


Île-du-Prince-Édouard
Prince Edward Island

2014
Inc.



Integrated Analysis & Evaluation Report

Economic Spin-Offs of the Activities of Prince Edward Island 2014

**Integrated Analysis & Evaluation Report
Economic Spin-Offs of the Activities of PEI 2014**



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1.0 Executive Summary

PEI 2014 was focused on a 150th anniversary year that celebrated and commemorated the historic Charlottetown Conference of 1864 and Prince Edward Island's role in the formation of Canada. In August of 2011 a non-profit entity was incorporated as PEI 2014 Inc. with a mission to build pride and awareness among Island residents and visitors about Prince Edward Island's important role as the Birthplace of Confederation; provide increased economic impact through tourism visitation to Prince Edward Island; and to act as a catalyst for Canada's 150th Birthday celebrations in 2017.

PEI 2014 Inc. delivered on this mission by creating a year of celebration with five major productions developed and hosted, other events receiving support and 161 events/projects in communities across PEI receiving grants through the PEI 2014 Fund.

The PEI 2014 Production Events varied in length from hours to a 70 day event. Attendance at the events ranged from 5,000 to over 140,000 and appealed to a wide variety of ages. Many of the PEI 2014 Production Events attracted party sizes larger than the average of 2.94 for PEI in general. The highest percentage of attendees at all events were Islanders except for the Founders Week Concert which attracted more attendees from NS and New Brunswick. The Founders Week Concert had the highest attendee total direct expenditures, and food and beverage was the highest expenditure category when all events were combined.

PEI 2014 Inc. provided support to some major events like East Coast Music Week and Big Red Music Festival. Support was also provided to Meetings & Conventions PEI including the funding of a Development Manager to promote PEI 2014 to delegates and planners and encourage them to host their event in PEI in 2014 and incorporate a PEI 2014 element in their agenda. A 69% increase in the number of meeting and conventions held, a 64% increase in delegates, and a 72% increase in room nights was achieved. Eighty-one percent (81%) of the delegates visited the province outside the main tourism season of July and August.

The PEI 2014 Fund provided almost \$4.7 million in grant funding to 161 events/projects, helping project recipients to leverage an additional \$1.7 million in other government funding and \$1.1 million in corporate, individual or foundation support. Eighty-nine percent (89%) of recipients indicated they would not have been able to host the event without PEI 2014 Inc. support. The other 11% of

recipients indicated the support had allowed them to enhance their project or event. Over 455,000 attendees participated in the events/projects organized by grant recipients. It is important to note that one individual may have participated in multiple events/projects or attended more than one day of a multi-day event.

PEI 2014 Programming strengthened arts, culture and heritage and Canadian pride and identity through various PEI 2014 Production Events, East Coast Music Week and PEI 2014 Fund Events/Projects.

The percentage of attendees rating their level of agreement a “4 or 5” on a Likert scale (1=strongly disagree to 5 = strongly agree) with various statements about strengthening arts, culture, heritage or Canadian pride and identity is shown below.

Indicator Supporting Strengthening Arts, Culture, Heritage and Canadian Identity and Pride	Percentage of Attendees at PEI 2014 Production Events & East Coast Music Week Agreeing that event...
Provided local Island talent with exposure to a broader audience	66% to 96%
Enhanced community spirit and participation	73% to 84%
Encouraged participation in a variety of cultural activities by PEI residents	56% to 79%
Enhanced pride amongst Islanders	69% to 78%
Strengthened Canadian pride and identity	51% to 74%
Strengthened arts, culture and heritage platforms in PEI	53% to 76%
Encouraged more cultural exchanges between local residents and tourists	46% to 70%
Increased local cultural identity	47% to 71%
Increased awareness and knowledge of PEI’s role in Canadian Confederation across Canada	34% to 76%

PEI 2014 Fund Events/Projects also supported these outcomes in a variety of ways.

PEI 2014 left a positive legacy for Islanders through:

- Commemorative projects like bronze statues of PEI Father of Confederation, William Henry Pope in Charlottetown and the Chair of the Quebec Conference, Étienne-Paschal Taché, in Quebec City;
- Hosting for the first time some major national conferences like the New Canada Conference, the Governor General, Lieutenant Governors and Territorial Commissioners Annual Gathering, and the National 4-H Citizenship Seminar;
- Provision of WorldHost internationally recognized customer service and hospitality training for over 1,260 individuals in PEI's tourism industry; and
- Engaging over 3,500 students in PEI's secondary schools through the RBC Celebrate 2014 School Program by providing curriculum activities, visits to historical sites and other activities.

PEI hosted a professionally organized celebration that provided attendees with a first class memorable experience. Attendee satisfaction at events was very high – ranging from 77% to 98% – with 60% or more of resident attendees and 53% or more of non-resident attendees indicating they would recommend PEI 2014 events to others. Ninety percent (90%) of attendees rated services provided in English as “4 or 5” on a Likert scale of 1 (very poor) to 5 (excellent). Service in French was rated “4 or 5” by 62% to 79% of attendees. The mean value of language service ratings across events was 3.79 or above. Overall, PEI 2014 Production Events provided good accessibility to event sites for seniors or those requiring wheelchair access, with 58.5% to 89% of attendees providing a rating of “4 or 5”.

PEI 2014 was a tourism and economic success. Prior to the 2014 year, the Tourism Advisory Council of PEI set a target of 5% increased tourism revenues for 2014 considering the impact the PEI 2014 Celebrations could potentially have. In a year in which tourism expenditure in Canada was up 3.3% over 2013 and only 3% in the neighbouring province of NB, PEI was able to achieve a 5.1% increase in expenditures over 2013 and the highest level of expenditures in any of the past 10 years. Expenditure analysis performed by the Centre for Tourism Research reveals the PEI 2014 Celebrations accounted for 10% of total direct tourism expenditures in 2014.

Tourism spending resulted in **a contribution to gross domestic product** directly related to PEI 2014 Celebrations **of \$39.3 million, sustained 799 person years of employment, and contributed \$17.7 million in taxes.** PEI 2014 Celebrations did not happen without a significant investment in

planning, marketing and implementation. Total expenditures over the 42 month period of planning, implementation and wrap-up totalled \$26.7 million. The investment to support these activities came from provincial, federal and municipal governments in the amount of \$26 million with other sources like corporate sponsorship, in-kind services and event ticket sales contributing \$1.4 million. This significant investment not only contributed to the 5.1% increase in tourism expenditures and 2.7% increase in visitation, PEI 2014 Inc. expenditures also made a non-recurring contribution to PEI's economy of \$25.2 million in gross domestic product and the creation or maintenance of 542 full-time equivalent jobs. Federal, provincial and municipal tax revenues were increased by \$11.8 million.

Description	Expenditure	Employment Impacts	Impact on Gross Domestic Product	Tax Impacts	Total Impact
PEI 2014 related tourism spending	\$40,300,000	799	\$39,300,000	\$17,700,000	\$57,000,000
PEI 2014 Inc. expenditures	26,700,000	542	<u>25,200,000</u>	<u>11,800,000</u>	<u>37,000,000</u>
			<u>\$64,500,000</u>	<u>\$29,500,000</u>	<u>\$94,000,000</u>
Return on \$26 million in public investment			<u>\$2.48</u>		<u>\$3.62</u>

PEI 2014 Celebrations built pride and awareness among Island residents and other Canadians about PEI's important role in Confederation and resulted in good economic value for PEI. The \$26 million investment of public money for hosting the yearlong celebration generated 2.5 times more in gross domestic product due to the tourism expenditure and the organizational expenditures associated with the event. If all the taxes collected by the various levels of government are taken into account, this ratio climbs to 3.6. For every \$1.00 of public money invested \$3.62 was contributed to gross domestic product and taxes.

2.0 A Year of Celebration

PEI 2014 was focused on the 150th anniversary year that celebrated and commemorated the historic Charlottetown Conference of 1864 and Prince Edward Island's (PEI's) role in the formation of Canada. The Conference was originally intended as a forum for the delegates to discuss the union of New Brunswick (NB), Nova Scotia (NS) and PEI. However, with the addition of delegates from the Province of Canada, the Conference became the starting point for the joining of the British North American colonies into the Confederation of Canada three years later in 1867.

The mission for PEI 2014 Inc., the non-profit organization created to manage the PEI 2014 Celebrations, was to build pride and awareness among Island residents and visitors about Prince Edward Island's important role as the Birthplace of Confederation; provide increased economic impact through tourism visitation to Prince Edward Island; and to act as a catalyst for Canada's 150th Birthday celebrations in 2017. The mission was supported with the following goals and objectives:

- Host a professionally-organized celebration that provides attendees with a first-class memorable experience.
- Create a sense of pride among Islanders and visitors.
- Emphasize and celebrate the pivotal role played by the 1864 Charlottetown Conference in our nation's history.
- Offer something meaningful to all Islanders and Canadians who visit.
- Celebrate the rich diversity Islanders bring to nation building.
- Showcase PEI and Canada's best in arts, culture and heritage.
- Motivate people to visit and take part in the celebrations.
- Leave a positive legacy for Islanders and all Canadians beyond 2014 by increasing recognition of PEI's identity as the Birthplace of Confederation.

The year of celebration included five major events developed and presented specifically for 2014 (PEI 2014 Productions, Section 2.1), one time funding support to existing events to make enhancements in their programming for the 2014 celebratory year (PEI 2014 Supported Programming, Section 2.2), and a grant fund (PEI 2014 Fund, Section 2.3) to provide opportunities across the

Province and throughout the year, for residents and visitors to share in the celebration of PEI culture and PEI's role in Canadian Confederation.

2.1 PEI 2014 Productions

The five major events developed and presented specifically for 2014 included: 1) New Year's Eve (NYE) Opening Celebration, 2) Canada Day, 3) Celebration Zone, 4) Founders Week and 5) New Year's Eve (NYE) Finale.

- 1) The NYE Opening Celebration was held on December 31, 2013, in Charlottetown, PEI. It included indoor and outdoor components. The outdoor component was free, family oriented and featured live entertainment, buskers, children's play area, fireworks, opening ceremonies, ice sculptures, and more at Murphy's Community Centre and Great George Street. The indoor component was a ticketed concert at the PEI Convention Centre featuring More Soul, Lennie Gallant and Johnny Reid.
- 2) Canada Day 2014 was held on July 1, 2014, at the Charlottetown Event Grounds. It was a free event that featured musical performances by local and national artists, fireworks, and other activities in celebration of the birthday of the nation.
- 3) The Celebration Zone was a 70-day cultural festival held from July 1 to September 7, 2014, at Confederation Landing Park on the Charlottetown waterfront. The festival featured interactive pavilions, live entertainment, historical displays, children's play area, chef demonstrations and tastings, movie nights and more. Entrance to the Celebration Zone was free of charge for the duration of the festival.
- 4) Founders Week was a celebration of the Fathers of Confederation and the week the delegates gathered in Charlottetown, 150 years prior, to take part in the discussions of Confederation at the 1864 Charlottetown Conference. Running August 28 to September 7, 2014, Founders Week was the pinnacle of the 2014 celebrations. The week consisted of three main events, in addition to the many smaller events taking place throughout the province, to celebrate this important week in Island and Canadian heritage. The Founders Week Concert was held on August 30, 2014, headlining Shania Twain and featuring Corey Hart and PEI's own Trinity Bradshaw and ending with a fireworks display over Charlottetown Harbour. The Tall Ships were held in both Charlottetown (August 28 - 31) and Summerside (August 31 - September 1) featuring public deck tours and sailing tours. The Feast of the Fathers, associated with the Fall Flavours Culinary Festival, featuring a four course meal, historical re-enactments, live entertainment and commemorative ceremonies was held on September 6, 2014.

- 5) The PEI 2014 NYE Finale was held on December 31, 2014, at Credit Union Place in Summerside and was the final event of a year-long celebration to commemorate the 150th anniversary of the 1864 Charlottetown Conference. The NYE Finale included a free family event featured activities such as bowling, skating, swimming, children's play area, buskers, ice sculptures, horse and wagon rides, live entertainment, closing ceremonies and fireworks. In addition to the free family event, there was an indoor ticketed concert in the Eastlink Arena that featured Burton Cummings, The Rankin Family and Doc Walker.

Sections 2.1.1 to 2.1.6 present a profile of attendees who participated in the PEI 2014 Productions.

2.1.1 Attendance at PEI 2014 Productions

Attendance at PEI 2014 Productions varied greatly by event with attendance ranging from almost 5,500 at the NYE Opening to over 140,000 for the multi-day Celebration Zone.¹

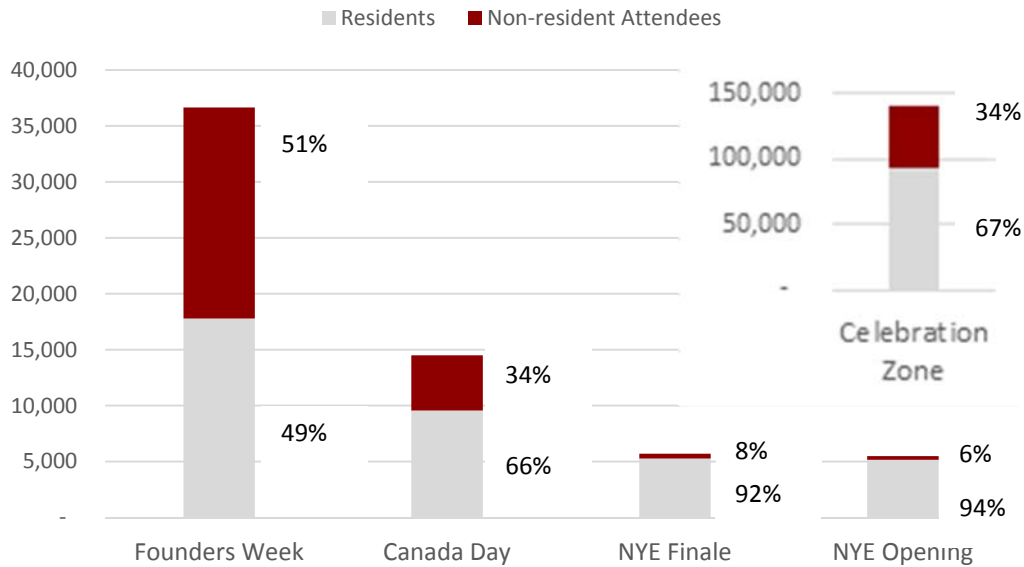
Approximately 207,800 people entered the Celebration Zone gates over the 70 days. Adjusting for multiple entrances, an estimated **140,018 unique attendees** visited the Celebration Zone over the 70 days. Approximately 67% of the attendees were residents.

All combined there were 36,645 attendees to Founders Week events. This could include attendees attending more than one event. Fifty-one percent (51%) of attendees were non-residents. There were an estimated **22,000 attendees** at the Founders Week Concert with the largest majority (60%) being non-residents. Also during Founders Week an estimated **11,200 people** attended the Tall Ships in Charlottetown and an estimated **3,200 people** attended the Tall Ships in Summerside. Approximately 61% of Tall Ships attendees were residents. In addition, **245 people** attended the Feast of the Fathers with 56% of attendees being residents.

There were an estimated **14,500 unique attendees** at Canada Day 2014 at the Charlottetown Event Grounds and 66% of these attendees were residents.

The NYE Opening Celebration had an estimated **5,487 unique attendees** while the NYE Finale Celebration had an estimated **5,709 unique attendees**. Ninety-two percent (92%) of attendees at the NYE Opening and Finale Celebrations were residents.

Figure 1: PEI 2014 Productions attracted from 5,487 to 140,018 unique attendees.²



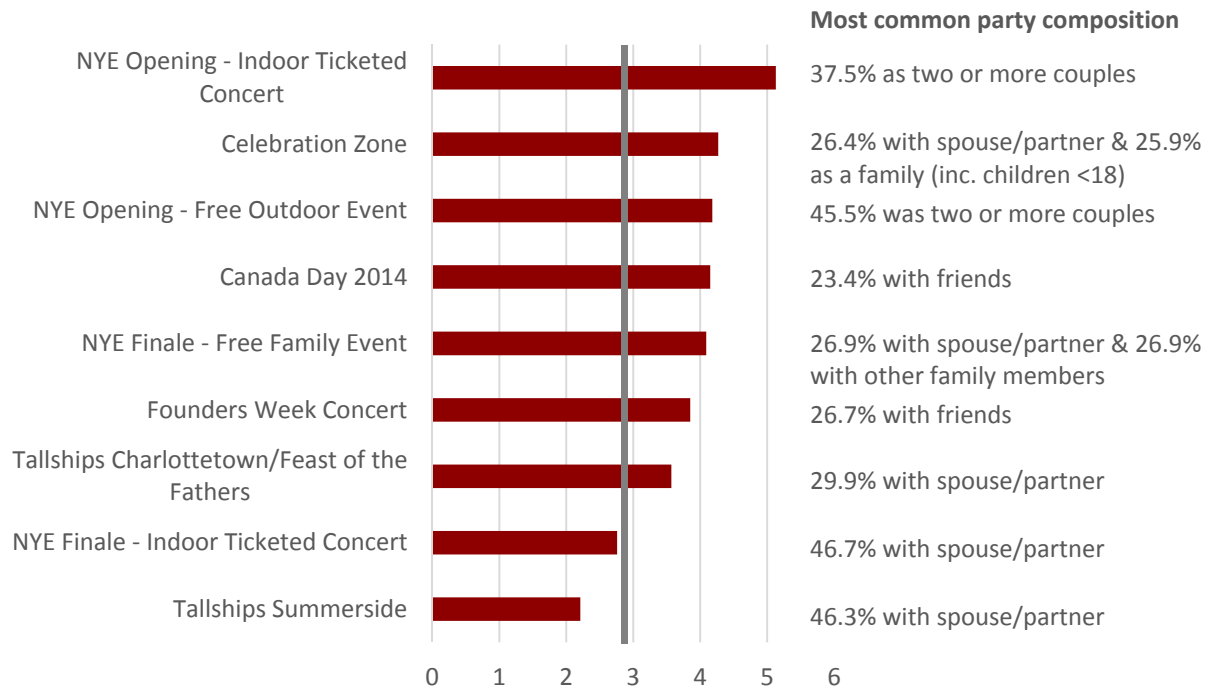
Approximately 16% of parties (68,611 parties) who visited PEI in 2014 participated in the PEI 2014 Celebrations during their trip to PEI. With an average party size of 2.94 this would indicate that approximately 202,000 non-residents attended at least one PEI 2014 event. An additional 6% were not sure if they had participated or not. Participation levels were greatest by overnight visitor parties from Ontario (23.5%) and the New England States (20.8%).³

2.1.2 Average party size and composition of PEI 2014 Productions

Many of the PEI 2014 Productions attracted a larger than average party size when compared to the average party size of 2.94⁴ for all visitors to PEI.

Figure 2: Average non-resident party size for PEI 2014 Productions ranged from 2.2 to 5.1 compared to an average party size of 2.94 for all visitors to PEI.⁵

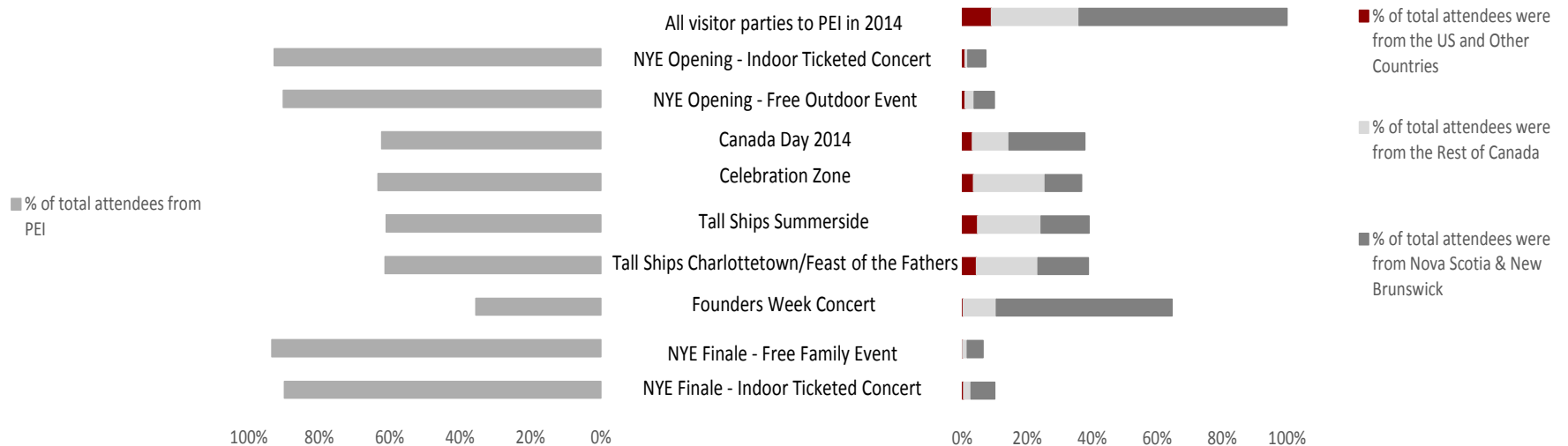
Average party size for all same-day and overnight visitors to PEI was 2.94 and 78% of these parties were comprised of adults only.



2.1.3 Origin of attendees at PEI 2014 Productions

In all PEI Productions except for the Founders week concert, the greatest percentage of attendees were from PEI. Founders Week Concert attracted the highest percentage of attendees from NS and NB.

Figure 3: PEI 2014 Productions motivated Islanders to take part in the celebration.⁶



Founders Week Concert had the highest percentage of visitors from NS and NB, Celebration Zone had the highest percentage of visitors from the rest of Canada and Tall Ships Summerside had the highest percentage of total attendees from the US and other countries.

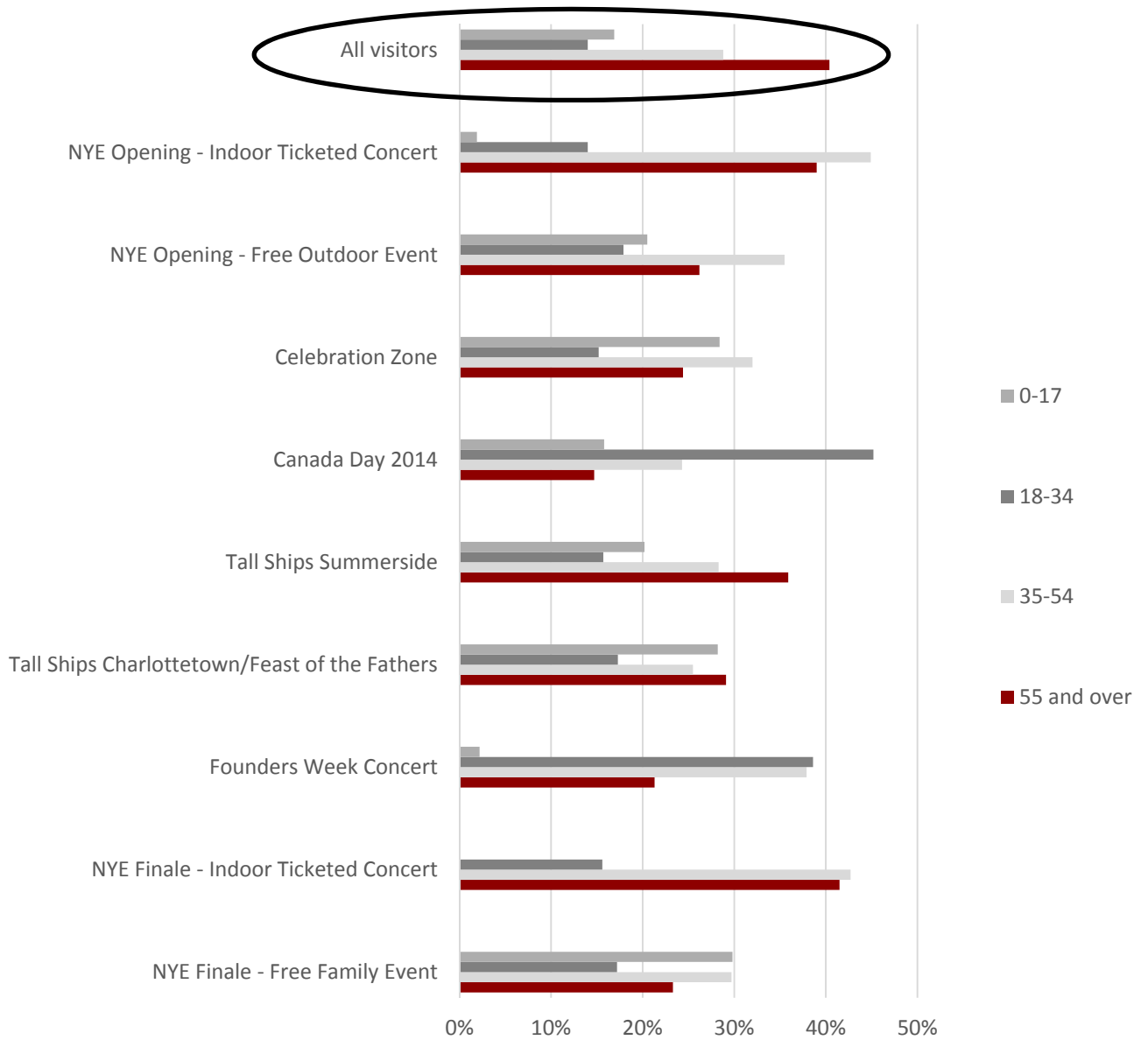
2.1.4 Gender of attendees at PEI 2014 Productions

Amongst all the PEI 2014 Productions visitor attendees the percentage of male attendees was slightly lower (43%) than the overall male proportion of total visitors to the Island and the percentage of female attendees was slightly higher (56%). Overall visitation to PEI in 2014 consisted of 47% males and 53% females.⁷

2.1.5 Age of attendees at PEI 2014 Productions

The age profile varied significantly by PEI 2014 Production event with the NYE Finale – Family Free Event having the highest percentage of attendees aged 0 to 17, Canada Day having the highest percentage of attendees aged 18 to 34, NYE Opening Indoor ticketed event having the highest percentage of attendees age 35 to 54, and the NYE Finale – Indoor ticketed concert having the highest percentage of attendees over the age of 55. The highest percentage of visitors in general to PEI in 2014 were over the age of 55.⁸

Figure 4: The PEI 2014 Productions appealed to a wide variety of ages and had something to offer all Islanders and Canadians who visited.⁹



2.1.6 Direct spending by PEI 2014 Productions attendees

Average spending per day/night for all PEI Productions (except for Celebration Zone) was higher by non-resident than resident. The highest overall spending occurred at the Founders Week Concert followed by the Celebration Zone. The highest average spending per day/night by non-residents occurred at the Founders Week Concert and the highest average spending per day/night by residents occurred at the NYE Opening Celebrations. Total direct spending as a result of PEI 2014 Production Events is estimated at almost \$14.9 million, with 69% of that being non-resident spending. Canada Day 2014, Celebration Zone, the NYE Opening and Finale family events, and Tall Ships Charlottetown and Summerside were free events.

Table 1: Attendees of the Founders Week Concert had the largest amount of direct spending as a result of a PEI 2014 Production Event.¹⁰

PEI 2014 Production	Total Direct Spending	Direct Spending of Non-resident Attendees	Average Spending per day/night ⁽¹⁾ Resident	Average Spending per day/night Non-resident
NYE Opening Celebrations	\$ 612,850	\$ 115,722	\$ 71.99	\$ 90.43
Canada Day 2014	1,160,956	923,374	\$ 24.28	\$ 34.21
Celebration Zone	5,824,676	3,940,797	\$ 20.05	\$ 12.39
Founders Week Concert	5,878,261	4,316,146	\$ 47.16	\$ 94.72
Tall Ships Charlottetown and Feast of the Fathers	874,201	748,303	\$ 15.79	\$ 57.20
Tall Ships Summerside	155,611	114,932	\$ 20.25	\$ 41.93
NYE Finale	<u>360,901</u>	<u>90,009</u>	\$ 33.51	\$ 44.68
Total	<u>\$14,867,456</u>	<u>\$10,249,283</u>		

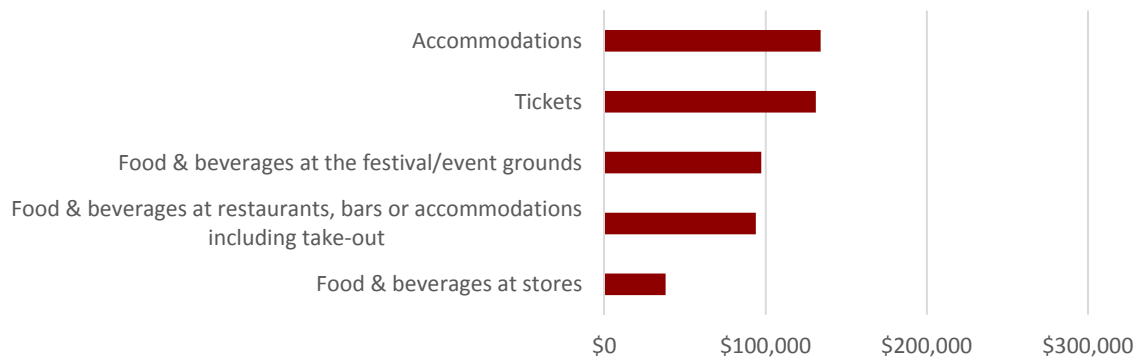
⁽¹⁾ Average spending per day/night does not include departing costs (bridge, ferry or airport fees) or event tickets.

The following shows the top five direct expenditure categories of attendees at the PEI 2014 Productions.

NYE Opening Celebration

The highest spending category for non-residents was accommodations, while the category with the highest expenditures for residents was ticket purchases.

Figure 5: The top 5 expenditure categories of attendees of the NYE Opening Celebration accounted for 81% of total direct spending of \$613,000.¹¹



Canada Day Celebrations (free admission)

The highest spending category for non-residents was accommodations, while the category with the highest expenditures for residents was food and beverages at the event grounds.

Figure 6: The top 5 expenditure categories of attendees of the Canada Day Celebrations accounted for 80% of total direct spending of \$1.16 million.¹²



Celebration Zone (free admission)

The highest spending category for non-residents was accommodations, while the category with the highest expenditures for residents was food and beverages at the festival/event grounds.

Figure 7: The top 5 expenditure categories of attendees of the Celebration Zone accounted for 77% of total direct spending of \$5.8 million.¹³



Founders Week Concert

The highest spending category for both non-residents and residents was ticket purchases.

Figure 8: The top 5 expenditure categories of attendees of the Founders Week Concert accounted for 81% of total direct spending of \$5.9 million.¹⁴



Tall Ships Charlottetown (free admission) and Feast of the Fathers

The highest spending category for non-residents and residents was food and beverages at restaurants, bars or accommodations including take-out.

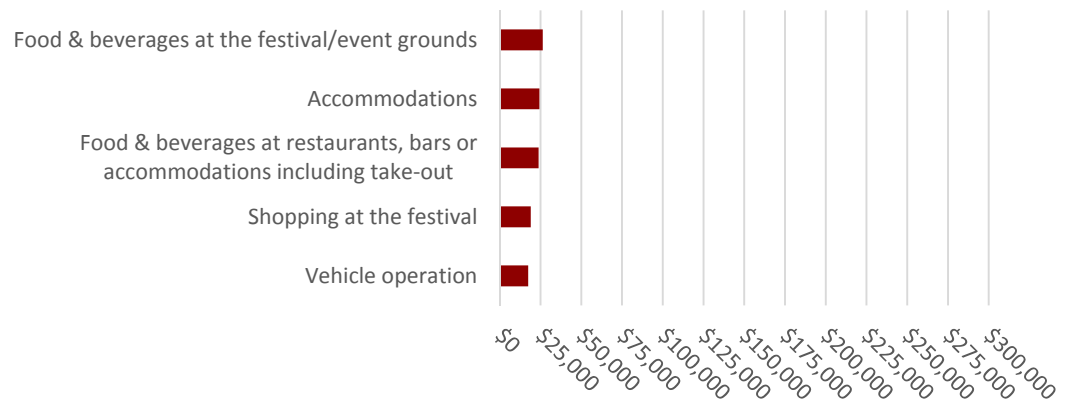
Figure 9: The top 5 expenditure categories of attendees of the Tall Ships Charlottetown and Feast of the Fathers accounted for 80% of total direct spending of \$874,000.¹⁵



Tall Ships Summerside (free admission)

The highest spending category for non-residents was accommodations, while the category with the highest category of expenditures for residents was food and beverages at restaurants, bars or accommodations including takeout.

Figure 10: The top 5 expenditure categories of attendees of the Tall Ships Summerside accounted for 71% of total direct spending of \$156,000.¹⁶



NYE Finale Celebrations

The highest spending category for non-residents was accommodations, while the category with the highest category of expenditures for residents was ticket purchases.

Figure 11: The top 5 expenditure categories of attendees of the NYE Finale accounted for 81% of total direct spending of \$361,000.¹⁷



All PEI 2014 Celebrations

Total expenditures that resulted from the PEI 2014 Celebrations were over \$40.3 million, accounting for 10.1% of total direct tourism expenditures in PEI in 2014. Expenditures by overnight visitor parties accounted for almost all (79%) of this spending. Direct tourism expenditures that resulted from the PEI 2014 Celebrations were estimated by the Centre for Tourism Research (CTR) at the Tourism Industry Association of PEI (TIAPEI) using several sources of information. For non-residents, the expenditures were estimated using the results from the 2014 PEI visitor exit survey, 2014 PEI survey of motor coach passengers, 2014 PEI survey of cruise ship passengers, and the 2014 PEI survey of Meetings & Conventions PEI delegates. From these survey results, the influence factor of the PEI 2014 Celebrations/events on the decision to travel to PEI was applied to each expenditure category to determine the expenditures that resulted from the PEI 2014 Celebrations. The expenditure amount also includes residents' expenditures only for those residents who travelled more than 40 kilometres one-way to attend a PEI 2014 event. Expenditures for this group of residents that resulted from the PEI 2014 Celebrations were estimated using the results of the surveys of attendees of PEI 2014 Production and Supported Events and four events that were recipients of large grants from the PEI 2014 Fund.¹⁸

The top three expenditure categories - food and beverage at restaurants, bars, or accommodations including take-out, accommodations, and shopping for general merchandise - comprised 72% of total direct spending.

Average spending per day/night for same day visitors was \$50.03 while overnight visitors spent on average \$86.54 per day/night.¹⁹

Figure 12: Direct spending on food and beverage at restaurants, bars, or accommodations including take-out accounted for \$18.4 million, the greatest proportion (46%) of PEI 2014 influenced spending.²⁰



2.2 PEI 2014 Supported Programming

PEI 2014 Inc. provided one time funding support to East Coast Music Week (ECMW), the Big Red Music Festival (Big Red) and Meetings & Conventions PEI (M&C PEI) to make enhancements to their programming for the 2014 celebratory year. Supported programming showcased PEI and Canada's best in arts, culture and heritage, motivated people to visit and take part in PEI 2014 Celebrations and increased recognition of PEI's identity as the Birthplace of Confederation. This section excludes grant funding provided under the PEI 2014 Fund. The PEI 2014 Fund is addressed in Section 2.3.

East Coast Music Week 2014 was held in Charlottetown from April 2 to April 6, 2014, and was sponsored in part by PEI 2014 Inc. East Coast Music Week is an annual event organized by the East Coast Music Association to develop, promote and celebrate East Coast Music and its artists. The location rotates between the four Atlantic Canadian provinces. To coincide with the PEI 2014 Celebrations, ECMW was held in PEI in 2014, one year earlier than it was originally scheduled to be held.

The Big Red Music Festival was a multi-day music festival held in Charlottetown on June 28, June 29 and July 12, 2014, at the Charlottetown Event Grounds. The festival featured entertainment by Marianas Trench, Lights, Sam Roberts Band, Hey Rosetta!, The Killers, and Death Cab for Cutie, among others.

Funding support provided to M&C PEI enabled the organization to create, direct and manage a term position, Meetings Development Manager. This position worked with meeting and convention planners and delegates in 2013 to increase awareness of the historical significance of 2014 and to encourage return visits in 2014 to participate in the celebrations. The position collaborated with various stakeholders to develop 2014 promotional items and to integrate 2014 themes into meeting itineraries. Another focus of the position was the creation of pre- and post- programs for Meetings & Conventions PEI delegates to encourage extended stays.

Sections 2.2.1 to 2.2.6 present a profile of attendees who participated in PEI 2014 Supported Events.

2.2.1 Attendance at PEI 2014 Supported Events

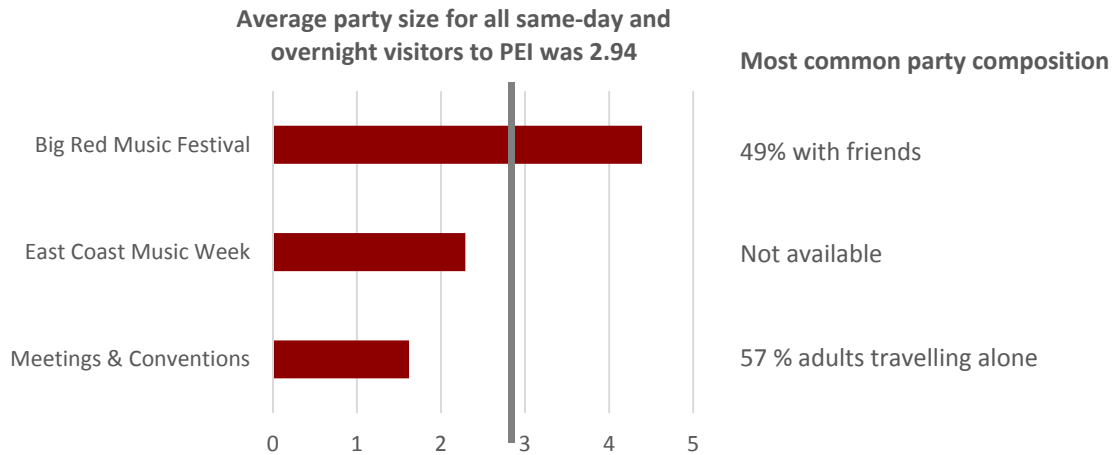
PEI 2014 Supported Events attracted various attendance levels:

- East Coast Music Week attracted an estimated **4,137 unique attendees**. ECMW was held in April outside of the main tourism season and 38% of attendees were non-residents.²¹
- Over the three days of the Big Red Music Festival there were an estimated **8,122 total attendees**. Forty-six percent (46%) of attendees were non-residents.²²
- The 194 Meetings & Conventions PEI held in 2014 attracted an estimated **21,167 delegates**.²³ Eight-four percent (84%) of M&C PEI delegates were non-residents. Non-resident M&C PEI delegates attracted over 11,000 party members. Meetings and conventions were held throughout the year with 81% of M&C PEI delegates being hosted outside of the main tourism season of July and August.²⁴

2.2.2 Average party size and composition at PEI Supported Events

Similar to PEI 2014 Production Events, the party size varied for the Supported Events.

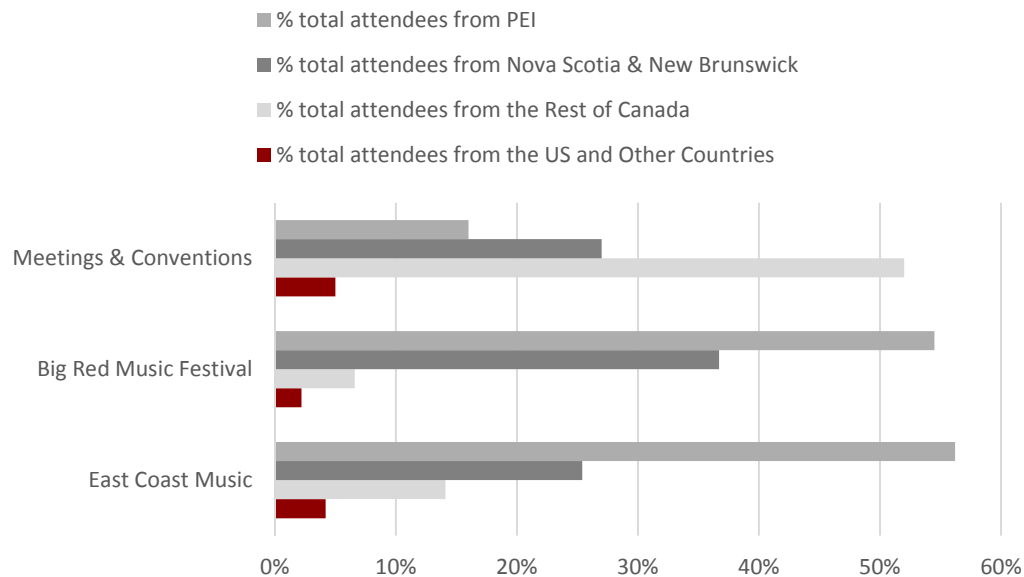
Figure 13: Average non-resident party size for PEI 2014 Supported Events ranged from 1.62 to 4.39. ²⁵



2.2.3 Origin of attendees at PEI 2014 Supported Events

Meetings & Conventions PEI attracted the highest percentage of attendees from Canadian origin outside of the Maritime Provinces. Big Red and ECMW had the highest percentage of attendees from PEI.

Figure 14: Meetings & Conventions PEI had the highest percentage of attendees from outside of PEI.²⁶



2.2.4 Gender of attendees at PEI 2014 Supported Events

The gender of attendees at PEI 2014 Supported Events was captured for Meetings & Conventions PEI and the Big Red Music Festival only. Meetings & Conventions PEI survey respondents consisted of 47% males and 53% females, the same profile as overall visitation to PEI while the Big Red Music Festival had less males at 43% and more females at 57%.²⁷

2.2.5 Age of attendees at PEI 2014 Supported Events

The age profile of attendees at PEI 2014 Supported Events was captured for Meetings & Conventions PEI and the Big Red Music Festival only. The age profile of attendees at the Big Red Music Festival was younger with the majority of attendees (64%) falling into the 18 to 34 years of age category. Forty-one percent (41%) of non-resident Meetings & Conventions PEI delegates were 35-54 (41%) while 45% of non-resident delegates were 55 years of age and over.²⁸

2.2.6 Direct spending by attendees at PEI 2014 Supported Events

Direct spending at PEI 2014 Supported Events totalled over \$22.3 million. It is important to note it is difficult with the Supported Events to determine the influence of PEI 2014 in attracting attendees. It was not the rotation year for PEI to host ECMW. The PEI 2014 Celebration was the reason PEI was chosen to host the event. Big Red attendees were surveyed as to the influence of the festival on their decision to travel to Charlottetown/PEI but not specifically the PEI 2014 Celebrations.

In the case of Meetings & Conventions PEI, and based on survey results, those delegates who were aware of PEI 2014 Celebrations before travelling to PEI indicated the celebrations had a 35.7% influence on their travel decision. When calculated based on all non-resident M&C PEI delegates, regardless of awareness and attendance at the PEI 2014 Celebrations, the influence factor is reduced to 2.1%. Estimated direct spending by non-resident M&C PEI delegates and their party members resulting from the PEI 2014 Celebrations has been estimated at \$588,210. With regards to Meetings & Conventions PEI, the decision factor as to the location of the meeting or convention is made by the organizer and not the delegates. The research plan for PEI 2014 Celebrations did include gathering information from Meetings & Conventions PEI organizers, however the survey response rate was too low to generate a statistically valid report. It is also important to note that overall, from 2013 to 2014 there was a:

- 69% increase in the number of Meetings & Conventions held in PEI (79 more)
- 64% increase in the number of non-resident and resident M&C PEI delegates attending (8,289 more)
- 72% increase in the number of guestrooms sold (16,103 more) ²⁹

Another factor contributing to an increase in Meetings & Conventions held in PEI during 2014 was an increase in capacity to host M&C PEI delegates with the opening of the PEI Convention Centre in August 2013.

Table 2: Direct spending generated by attendees of PEI 2014 Supported Events³⁰

PEI 2014 Supported Events	Total Direct Spending	Direct Spending of Non-resident Attendees	Average Spending per day/night Resident	Average Spending per day/night Non-resident
ECMW	\$ 858,457	\$ 676,074	\$17.30	\$105.88
Big Red Music Festival	1,183,880	757,761	\$49.39	\$125.02
Meetings & Conventions	20,270,515	20,270,515	n/a	\$178.71
Total	<u>\$22,312,852</u>	<u>\$21,704,350</u>		

The following shows the top five direct expenditure categories of PEI 2014 Supported Events.

East Coast Music Week

The highest spending category for non-residents was accommodations, while the category with the highest category of expenditures for residents was ticket purchases.

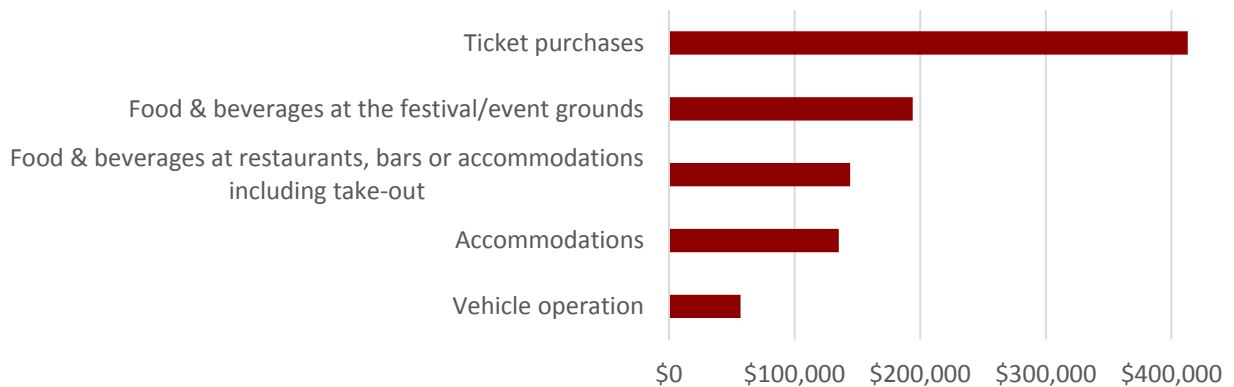
Figure 15: The top 5 expenditure categories of attendees of ECMW accounted for 83% of total direct spending of \$858,000.³¹



Big Red Music Festival

The highest spending category for both residents and non-residents was ticket purchases.

Figure 16: The top 5 expenditure categories of attendees of the Big Red Music Festival accounted for 80% of total direct spending of \$1.18 million.³²



Meetings & Conventions PEI

Only non-resident spending was captured for Meetings & Conventions PEI delegates.

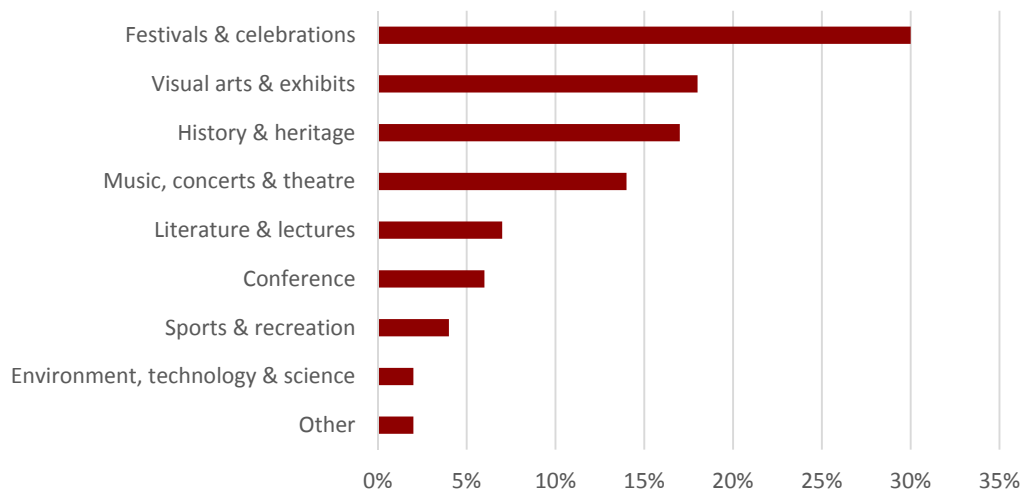
Figure 17: The top 5 expenditure categories of non-resident Meetings & Conventions PEI delegates and their party members accounted for 89% of total direct spending of \$20.3 million.³³



2.3 PEI 2014 Fund

The PEI 2014 Fund was created to provide opportunities, across the Province and throughout the year, for residents and visitors to share in the celebration of PEI culture, and PEI's role in Canadian Confederation. From the outset, this encouraged people to come together to reflect on the meaning of 1864 and to plan an event that would help to inform Islanders and Canadians and enhance appreciation of Canadian history. A variety of types of projects were funded.

Figure 18: Festivals and celebrations were the most frequent type of PEI 2014 Fund project with 30% of grants fitting this category.³⁴



2.3.1 PEI 2014 Fund grants leveraged \$2.8 million in additional funding

One hundred and sixty (161) grants received \$4,687,000 in funding from PEI 2014 and leveraged another \$1,709,000 from other provincial, federal or municipal government funding, and \$1,126,000 in corporate, individual or foundation funding. Eighty-two percent (82%) of the leveraged funding was in cash and 18% in-kind. Revenue from the events in the form of admission fees and purchases on site were estimated at \$1,182,305. PEI 2014 Fund supported project organizers spent an estimated \$8,340,000 (cash: \$7,837,000 and in-kind: \$504,000) on programming, publicity & marketing, and administration expenses.³⁵ A listing of PEI 2014 Funded Events/Projects is included in Appendix 2.

2.3.2 PEI 2014 Fund provided small, midsize and large grants³⁶

There were three categories of grants. Forty-one (41) large grants (\$25,001 to \$200,000) were awarded and received 78% of the funding. The PEI 2014 Fund could contribute up to 75% of the proposed total budget for large projects. Large projects leveraged an average of \$56,000 in cash and in-kind contributions from the private and public sectors per project.

Fifty-seven (57) midsize grants (\$2,015 to \$25,000) were awarded and received 19.5% of the funding. The Fund could contribute up to 75% of the proposed total budget for midsize projects. Midsize projects leveraged an average of \$7,400 in cash and in-kind contributions per project.

Sixty-three (63) small grants (up to \$2,014) were awarded and received 2.5% of the funding. The Fund could contribute up to 90% of the proposed total budget for small projects. Small projects leveraged an average of \$1,900 in cash and in-kind contributions per project.

2.3.3 Attendance/participation in PEI 2014 Fund Events/Projects

PEI 2014 Fund Events/Projects were attended or participated in by an estimated 455,200 attendees. Approximately 31% of attendees were estimated by grant recipients to be non-resident.³⁷ It is important to note that one individual may have participated in multiple events/projects or attended more than one day of a multi-day event.

A few examples of unique or enhanced project elements the PEI 2014 Fund enabled

....

Creation of a 70 page graphic novel about PEI and Confederation.

Creation of multi-media components such as early tourism publications, old retail catalogues, photos from the Public Archives and Records office, lady's journals from the 1860's and images on shipbuilding.

Creation of a Gold Cup Parade float depicting the Confederation theme and a replica of Province House gifted to the City for future use.

Planting of a Confederation Forest.

A diverse group of Aboriginal young people from across Canada came together to reflect on the lasting impact of Confederation.

2.3.4 PEI 2014 Fund provided the opportunity for events/projects to be implemented

Based on information provided by the grant recipients, 89% of the PEI 2014 Fund projects could not have been implemented without the Fund's support. These projects included elements that were created specifically to celebrate or commemorate historical events related to the 1864 period in PEI. Of the 11% which could have been implemented without the PEI 2014 Fund contribution, these were annual or repeat events but recipients unanimously noted the PEI 2014 Fund enabled them to include new elements in their event for 2014.³⁸

2.3.5 PEI 2014 Fund supported Rock the Boat MusicFest and Kings Playhouse 2014 Summer Programming

Additional research was conducted with participants of four large grant recipient events. The survey response rate for two of the events was not sufficient to generate statistically accurate data. Details of the results from the other two events are presented as follows:

The **Rock the Boat MusicFest** took place in Tyne Valley, PEI, on August 2, 2014. Rock the Boat MusicFest was part of the Tyne Valley Oyster Festival and featured an outdoor concert held at Green Park, which is located in the North Cape Coastal Drive region of PEI. The event featured five performers including Blue Rodeo, Alan Doyle and Jimmy Rankin.

Rock the Boat MusicFest greatly enhanced the existing Tyne Valley Oyster Festival, and showcased the western part of PEI including the North Cape Coastal Drive region. The year 2014 was the first year of the event, which was made possible through funding from the PEI 2014 Fund. The event was also repeated in 2015.³⁹

An estimated 3,564 people attended Rock the Boat MusicFest. Sixty-six percent (66%) of attendees were residents, while 34% of the attendees were non-residents. The majority of non-residents were from Canada with the largest percentage (38%) originating from Ontario.

The **summer programming at the King’s Playhouse** in Georgetown featured 18 performances of the *Drowsy Chaperone* which took place between June 29 and August 27, and trolley tours in Georgetown on July 17-20.

King’s Playhouse is a theatre located in Georgetown that has been hosting numerous events and productions every year for 120 years. The theatre was a recipient of funding from the PEI 2014 Fund to assist with the enhancement of their summer programming in 2014.⁴⁰

*There were an estimated 3,758 total attendees of both the *Drowsy Chaperone* and the Georgetown trolley tours. Seventy-six (76%) percent of attendees were PEI residents. The majority of the 24% of non-resident attendees were from Canada with the largest percentage (31%) originating from Ontario.*

Table 3: Direct spending generated by attendees at the two PEI 2014 Fund events surveyed.⁴¹

PEI 2014 Funded Projects	Total Direct Spending	Direct Spending of Non-resident Attendees	Average Spending per day/night Resident	Average Spending per day/night Non-resident
Rock the Boat MusicFest	\$ 417,620	\$ 213,111	\$ 51.72	\$ 40.13
Kings Playhouse 2014 Summer Programming	\$ 121,477	\$ 26,794	\$ 20.62	\$ 5.17

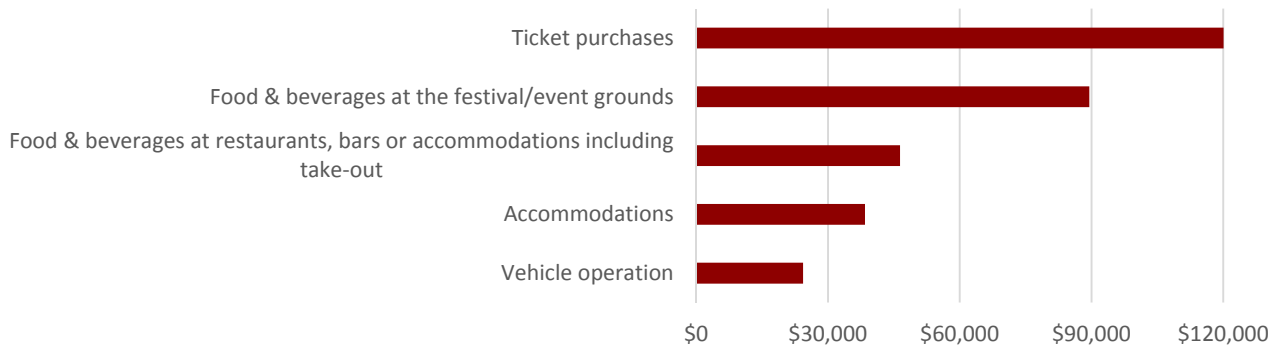
Direct spending of the approximately 448,000 attendees at other PEI 2014 Funded projects was not captured.

The following shows the top five direct expenditure categories of the two events.

Rock the Boat MusicFest

The highest spending category for both residents and non-residents was ticket purchases.

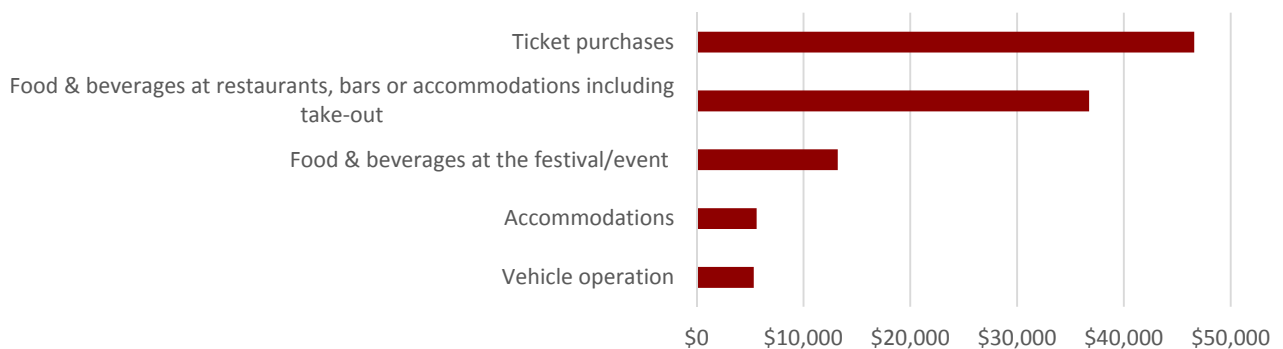
Figure 19: Top 5 expenditure categories of attendees of Rock the Boat MusicFest accounted for 76% of total direct spending of \$417,600.⁴²



King's Playhouse Summer Programming

The highest spending category for both residents and non-residents was ticket purchases.

Figure 20: The top 5 expenditure categories of attendees of the King's Playhouse Summer Programming accounted for 88% of total direct spending of \$121,000.⁴³



Further detail on these two projects is shared in other sections of this report.

3.0 PEI 2014 Programming Strengthened Arts, Culture, Heritage and Canadian Pride and Identity

Arts, culture and heritage have an important role in creating vibrant communities that attract residents and visitors alike. Statistics Canada's Culture Satellite Account (CSA) and other studies have helped to quantify the economic contribution of arts, culture and heritage to Canada but the social, more qualitative benefits are harder to define and measure. For this project, the following indicators were used to help evaluate how programming, events and activities helped to strengthen arts, culture, heritage and Canadian pride and identity.

- Provided local Island talent with exposure to a broader audience
- Enhanced community spirit and participation
- Encouraged participation in a variety of cultural activities by PEI residents
- Enhanced pride amongst Islanders
- Strengthened Canadian pride and identity
- Strengthened arts, culture and heritage platforms in PEI
- Encouraged more cultural exchanges between local residents and tourists
- Increased local cultural identity
- Increased awareness and knowledge of PEI's role in Canadian Confederation across Canada

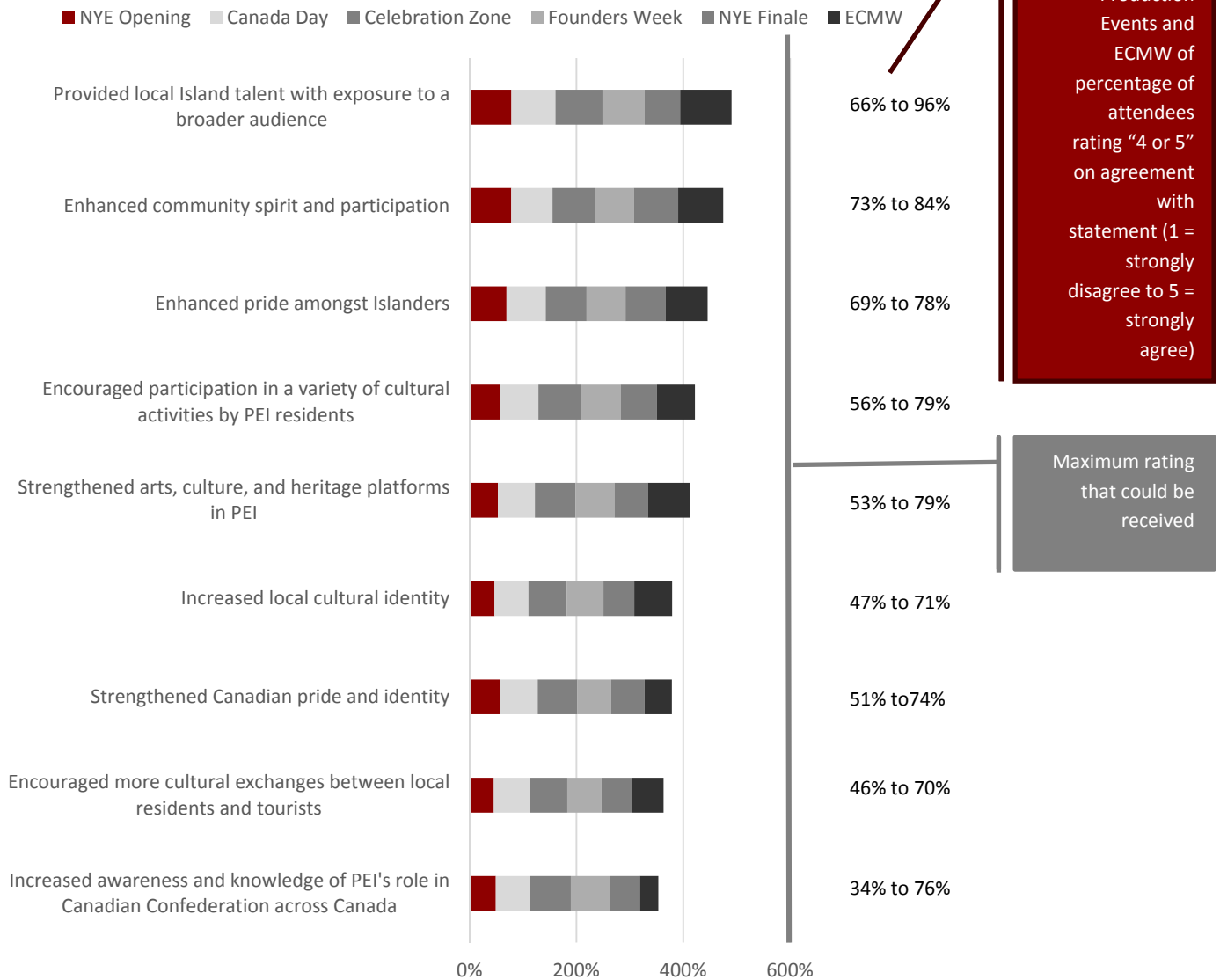
Arts, culture and heritage are often closely linked and interwoven, and the contributions of the individual PEI 2014 Celebrations were rarely limited to just one indicator. This section presents some of the most typical ways the various PEI 2014 programming, events and festivities achieved the desired indicators.

PEI 2014 Production Events and ECMW

Surveys were conducted with resident and non-resident attendees of the PEI 2014 Productions (NYE Opening & Finale Celebrations, Canada Day, Celebration Zone and Founders Week) and ECMW 2014, which received funding support from PEI 2014 Inc. The surveys revealed attendee's rating of their level of agreement with

various statements about strengthening arts, culture, heritage or Canadian pride and identity using a “4 or 5” on a Likert scale (1=strongly disagree to 5 = strongly agree). Results for ratings of “4 or 5” are shown below.

Figure 21: A large percentage of attendees at PEI 2014 Production Events and ECMW perceived that arts, culture, heritage and Canadian pride and identity were strengthened.⁴⁴



PEI 2014 Fund Events/Projects

The PEI 2014 Fund was created to support projects that encouraged creativity, innovation, community connections and diverse participation in every corner of PEI. Some specific PEI 2014 Fund goals included:

- Providing opportunities for residents and visitors across PEI to share in the celebration of our culture and our role in Canadian Confederation
- Supporting a range of arts, culture heritage and civic-focused activities that created pride, excitement and enthusiasm for the 150th anniversary of the 1864 Charlottetown Conference
- Facilitating new, or expanding upon existing, cultural or community partnerships
- Acknowledging all voices including First Nations, youth, women, Acadians and others through a celebration of their creativity, art, culture and history
- Fostering dialogue that recognized PEI's and Canada's heritage and providing thoughtful planning for our future
- Mobilizing communities to share in the planning and implementation of the 2014 celebration

Recipients of PEI 2014 Fund grants provided activity reports which included information on how their projects or events:

- Fostered a sense of belonging and feeling of pride for Islanders and Canadians
- Increased appreciation for the arts, culture and/or heritage
- Provided a lasting benefit

The following sections provide examples of projects and events supported by PEI 2014 Inc. funding that demonstrated how the desired outcomes of PEI 2014 were achieved. There were numerous projects that strengthened arts, culture, heritage and Canadian pride and identity.

3.1 Provided local Island talent with exposure to a broader audience

The Community of Afton received a PEI 2014 Fund grant to feature **a concert of Island artists** on the banks of Port-la-Joye/Fort Amherst.

*“All three performers at Fort Amherst were **fantastic and we received many positive comments** from those in attendance of how much they enjoyed the performance of local talent. The concert was in a*

*wonderful location and is a showcase of the history of PEI. The **crowds were given a show of local talent**; feeling of co-operation among the volunteer committees; and a sense of pride in our beautiful communities on the South Shore of PEI. Exposure of the wonderful talent and skills of many Islanders created a wonderful memory of a great day of music and friendship.”*

- Event Organizer

3.2 Enhanced community spirit and participation

The Argyle Shore Women’s Institute received a PEI 2014 Fund grant to organize a **Community Variety Concert** which featured both **amateur and professional performers**, the majority of whom were residents of Argyle Shore or who have a connection to the community.

*“At one time, Argyle Shore produced its own variety shows, using local talent who volunteered their performance time. As the population ages and demographics change, the previous level of participation dwindled. **This project brought out many of the people who had previously participated in these community events as well as their children and***

***grandchildren.** The concert also attracted many new residents of Argyle Shore and those with community connections. The concert generated positive comments and appears to have sparked **a revived interest and resurgence of vitality to participate in the community.**”*

-Event Organizer

3.3 Encouraged participation in a variety of cultural activities by PEI residents

Art in the Open was a free, interactive summer event that highlighted Charlottetown's vibrant art scene, its downtown heritage spaces, its exhibition venues and its diverse cultural traditions. The **event invited the greater community to engage in the creation and appreciation of art** in its various forms.

*"By bringing a high level of art to the community we were able to catch the attention of a broad audience and have the **opportunity to introduce a wide demographic to contemporary art**. By its nature the festival is accessible, inviting and interactive. For some, the festival serves as an introduction to contemporary art, while for others it renews an existing appreciation for the arts. Several of the projects incorporated locals in their final performance, which deepens the community connection to the event. As many as 400 Islanders took part in the crowd parade, and dozens of people from the Island - and from away - took part in the workshops and opportunities for artist collaboration. From this they gain new skills, new appreciation for the arts, and will likely share that experience with their friends and family."*

-Event Organizer

3.4 Enhanced pride amongst Islanders

STORY was a theatrical production, featuring songs and stories focused on PEI's history and heritage.

*"A **sense of belonging** and the **feeling of pride for Islanders** are two of the most poignant themes that resonate throughout **STORY**. The show tirelessly exemplifies and fosters this throughout each scene.*

Whether it be in a recounting of the memories forged through time spent waiting at the ferry terminal, the verses that speak of how an Island is a dramatically separate place, in not only its geography but its identity, or displayed in the music and lyrics of the artists, as they sing about growing up and leaving the Island only to find their way back again."

-Event Organizer

3.5 Strengthened Canadian pride and identity

The Canada Pavilion at the Celebration Zone **celebrated Canadian and Island pride, accomplishments, creativity, visual arts, history, athletes, and PEI's aboriginal community.** The Pavilion was also host to a show in partnership with the Mi'kmaq Confederacy of PEI that encouraged performing arts experience and training among youth from PEI's aboriginal community and host to *14 Books, One Island* to encourage literacy and celebrate Canadian literacy. Interactive activities such as "Ask an Athlete" and "Who's your Father?" were also components of the Canada Pavilion.

The PEI 2014 Fund provided a grant for The Heritage Canada National Trust annual national conference, the largest heritage conservation conference in Canada, attracting 350-425 attendees each year. It is a unique forum where the **full spectrum of Canada's heritage sector comes together** to learn and network: from volunteers and students, to professionals, policy-makers and craftspeople.

*"The conference had a strong focus on highlighting and learning from the heritage achievements and solutions generated by PEI and Canadian communities, and this **undoubtedly helped to foster a feeling of pride for local and national delegates.** The conference will also push beyond urban Charlottetown to address the challenges and opportunities for rural heritage in PEI and foreground the way heritage interests overlap with those of land trust, watershed, and natural history*

*groups. [1] Learning Tours - A wide array of well-attended learning tours got delegates out into PEI's fabled rural landscape and around historic Charlottetown providing new insights for locals and visitors alike. The tours included (a) adapting and sustaining heritage churches (b) adapting and sustaining heritage lighthouses (c) Summerside downtown regeneration (d) Mi'kmaq heritage landscapes (e) Social enterprise and heritage in Charlottetown (f) Acadian PEI (g) PEI National Park, Green Gables, and historic seascapes (h) Landscapes of Confederation walking tour in Charlottetown (i) Adaptive reuse tour of downtown Charlottetown. [2] Conference learning sessions - **the conference featured a coast-coast range of over 80 speakers presenting on topics related to PEI and Canadian heritage achievements in heritage conservation over the last four decades.**"*

-Event Organizer

3.6 Strengthened arts, culture and heritage platforms in PEI

There were many creative ways in which PEI 2014 Celebrations strengthened arts, culture and heritage platforms in PEI. These included **art exhibits, published literature, audio recordings, short-film productions, theatrical showcases, local artisan displays and historical interpretations**. In addition, the province was also honoured to welcome Their Royal Highnesses, The Prince of Wales and The Duchess of Cornwall, on Victoria Day weekend in 2014, further **supporting an appreciation of PEI and Canada's heritage**.

The **Art Works Here project** which received a PEI 2014 Fund grant consisted of creating 12 new pieces of artwork to be installed on the Main Street and waterfront areas of Montague, with a goal of beautifying the Main Street, providing local artists a platform to display their talent, and promoting Montague as a cultural tourism destination.

*"Montague has always been rich in arts, culture and heritage, but until recent years, this was not on display. **Artisans on Main and the art trail have really given a new appreciation for the arts in our region**, and the local [residents] and businesses have witnessed the payoff. There are many talented artists in Eastern PEI, but they are rarely given the opportunity to display their talents for all to see. **Many local businesses have bought into the idea of supporting the arts**, as they have been helping the Town in beautifying our streets."*

-Event Organizer

3.7 Encouraged more cultural exchanges between local residents and tourists

In engaging in cultural exchanges with visitors from Canada and abroad, Islanders gain from expanded knowledge and understanding, and non-residents learn more about the Island's arts, culture and heritage direct from the source. **Through conferences, symposiums and other events, Islanders embraced the opportunity to connect with non-residents**, who were experiencing first-hand what the Island has to offer.

The **National 4-H Citizenship Seminar** received a grant under the PEI 2014 Fund.

*"This was the **first time a national 4-H program had been held on PEI**. The PEI members in attendance took a lead role during the seminar in **educating the rest of the participants about Island culture and a real sense of pride was evident** in the fact that they were able to show off their home province."*

-Event Organizer

3.8 Increased local cultural identity

"Don't Ye Know Theatre" is a growing organization whose members are

The Don't You Know Theatre Company produced a play **depicting the history of the Elmira Railway Station and Museum** and tales surrounding it at the Eastern Kings Community Centre. They also performed free puppet shows at the Elmira Railway Museum and East Point Lighthouse and performed character walkabouts at a free, 1864 style picnic with heritage games, entertainment, and cake and ice cream at the Eastern Kings Community Centre.

*committed to **offering cultural and heritage education and entertainment** to both locals and visitors. "The End of the Line" was based on both history and folklore of the Elmira Railway Museum. The history of the station has been preserved by the PEI Museum and Heritage Foundation and this history was brought to life on the stage through music, narrative and dance. **The young participants in the theater company became aware of this important heritage** and its position in the community and how it relates to our Island history."*

-Event Organizer

3.9 Increased awareness and knowledge of PEI's role in Canadian Confederation across Canada

PEI 2014 Inc. was a title sponsor of the Confederation Players, **young bilingual actors who brought history alive through guided walking tours of historic Charlottetown, performed historical re-enactments, and made special event appearances** as the Ladies and Fathers of Confederation. They educated visitors and Islanders with the story of the 1864 Charlottetown Conference. In addition to performing historical vignettes and providing guided walking tours they participated in five PEI 2014 Production Events and were engaged as special guests at many national conferences held in PEI during 2014.

The PEI 2014 Fund provided a grant to the **Gold Cup Parade** which has been an Island institution for the last 50 years and continues to be an integral part of PEI's summertime activities to enable them **to honour the 2014 Celebration by adopting the Confederation theme "2014 – Celebrating 150 Years of the 1864 Conference."**

*"The Gold Cup Parade is an Island tradition for over 50 years bringing together generations of Islanders to enjoy the morning long event. In 2014, a news conference announcing this year's Confederation theme was held in June along with an **extensive pre-event marketing campaign both on and off Island promoting the 2014 parade theme.** The Gold Cup Parade has grown to be the largest street parade in Eastern Canada and runs for two hours through the streets of downtown Charlottetown as well as being broadcast live on Eastlink Television throughout PEI and NS."*

-Event Organizer

4.0 PEI 2014 Left a Positive Legacy for Islanders

One of the intentions of PEI 2014 was to educate and leave a legacy for Islanders and Canadians beyond 2014 by increasing the recognition of PEI's identity as the Birthplace of Confederation. This was accomplished through a variety of PEI 2014 supported initiatives and events held provincially and nationally.

4.1 Knowledge of the 1864 Charlottetown Conference has increased

To help measure the knowledge of the 1864 Charlottetown Conference before and after the PEI 2014 Celebration Year, the following questions were added to pre- and post- event surveys, conducted in September/October of 2013 and again in March/April of 2015, with PEI residents and non-residents belonging to two online panels managed by the CTR.

1. Have you ever heard of the 1864 Charlottetown Conference?



PEI 2014 Fund - Art

- PEI 2014 Sesquicentennial Art Commissions and Collection
- Diversity Fountain
- History is Art
- A Day at the Circus: September 1, 1864 Through the Eyes of a Child
- Eptek Art & Culture Centre Costumes
- Strong Roots, Tall Branches, Bright Futures: Our Tree of Life Mural
- Fierté de notre village (murals)
- Historic Hillsborough River Commons (entranceway landscaping and public art)
- Great George Heritage Walk
- Paint the Shed
- Artist on the Boardwalk
- Commemorative Mural - Silver Threads Club
- 1864 Costumes J.A. MacDonald Era
- Art Works Here Producing a Public Art Trail On-site
- Celebrating Cardigan's Shipbuilding Heritage
- Frank Ledwell Literacy Legacy Project
- For the Love of Art, Community & PEI



**PEI 2014 Fund
- Display/Exhibits**

- IMAGINE 1864 Summerside Yesterday, Today and Tomorrow
- Heritage Photographic Exhibit
- Digging into the Past: An Archaeological Discovery in Malpeque Bay
- The Old Stock
- The Tale of a Town – PEI
- Keep Your Stick on the Ice: Portraits of Girls in Hockey
- Pierre Jacques Pioneer Cemetery
- 1864 Conference – Point Prim Lighthouse
- Kingston Historical Project
- Recueil – Histoire de l-époque!
- Tryon Peoples' Cemetery Memorial Celebration
- Kelvin Grove – Our Community History Through the Architectural Heritage
- Trésors du Musée acadien: 50 ans de bâtir une collection du patrimoine acadien de l'île
- Farming Homegrown Pride – Celebration of the History and Culture of our Farms
- Newspapers Canada Front Pages Collection

2. If you have heard of the 1864 Charlottetown Conference, on a scale of 1 (not at all knowledgeable) to 5 (very knowledgeable), please rate your knowledge of the 1864 Charlottetown Conference?
3. What was the main result of the 1864 Charlottetown Conference? (Respondents were asked to select from a pre-set list. The correct response was - *It started the discussions that eventually led to Canadian Confederation.*
4. Respondents were also asked to indicate their level of agreement on a scale from 1 (strongly disagree) to 5 (strongly agree), with a number of statements relating to attitudes towards the 1864 Conference (See Table 4 and 5).

The number of resident panel members who had **heard of** the 1864 Charlottetown Conference increased from 96% in 2013 to 98% in 2014. Amongst non-resident panel members, the number who had heard of the 1864 Charlottetown Conference increased from 65% in 2013 to 83% in 2014.⁴⁵

The mean value of resident panelist's **assessment of their knowledge** of the 1864 Charlottetown Conference increased from 3.29 in 2013 to 3.49 in 2014. Amongst non-resident panelists the mean value increased from 3.01 in 2013 to 3.18 in 2014.⁴⁶

The percentage of resident panelists who could **identify the main result** of the 1864 Charlottetown Conference increased from 72% in 2013 to 81% in

2014. Amongst non-resident panelists the percentage increased from 55% in 2013 to 64% in 2014.⁴⁷

Tables 4 and 5 show the change in **attitude** ratings of resident and non-resident panelists from 2013 to 2014.

Table 4: The mean value (5= strongly agree) increased for 4 out of 5 attitude statements with resident panelists from 2013 to 2014.⁴⁸

Attitude Statements	2013	2014
Charlottetown’s designation as the “Birthplace of Confederation” is important	4.19	4.27
I am proud of PEI’s role in Canadian Confederation	4.11	4.24
There is value in celebrating and showcasing the Island’s historical role in Canadian Confederation	4.05	4.07
The 1864 Charlottetown Conference is important in defining PEI’s identity within Canada	3.99	4.03
When friends of family visit PEI, I encourage them to learn about the province’s role in Confederation and visit related sites	3.49	3.43

Table 5: The mean value (5= strongly agree) increased for 3 out of 4 attitude statements with non-resident panelists from 2013 to 2014.⁴⁹

Attitude Statements	2013	2014
The 1864 Charlottetown Conference is an important part of Canada’s history	4.46	4.49
The 1864 Charlottetown Conference was a catalyst for the formation of Canada	4.33	4.39
The Sesquicentennial of the 1864 Charlottetown Conference is an important event for all Canadians that should be recognized and celebrated	4.16	4.18
I am interested in learning more about the 1864 Charlottetown Conference and its role in Confederation	3.86	3.73

It is reasonable to assume CTR survey panel members would have a fairly high level of awareness and knowledge of PEI’s heritage and culture by virtue of being involved in the CTR panels. The four questions noted above were also asked in pre-event surveys conducted with a random sample of PEI residents and Canadians in other provinces in January/February of 2014 and results are shown in Table 6. The resident random sample group had slightly lower percentage and mean scores than the resident panel groups. The percentage and mean scores of

the random sample non-resident group were much lower than those of the non-resident panelists.

Table 6: Random sample survey results were lower than resident and non-resident panelists survey results.⁵⁰

Survey Question	Resident Group	Non-resident Group
Heard of the 1864 Charlottetown Conference	95%	40%
Assessed knowledge of the 1864 Charlottetown Conference	3.25 mean value	2.66 mean value
Identification of main result of the 1864 Charlottetown Conference	63%	36%
<i>Charlottetown's designation as the "Birthplace of Confederation" is important</i>	4.22 mean value	N/A
<i>The 1864 Charlottetown Conference is an important part of Canada's history</i>	N/A	4.18 mean value

Post event research with a random sample of residents and non-resident had not been completed at the time of writing this report.

4.2 The role of PEI and Quebec in achieving Canadian Confederation was commemorated through a number of projects

Discussions about Confederation commenced at the Charlottetown Conference and continued a month later at the Quebec Conference. PEI and Quebec collaborated on a number of projects during PEI 2014 Founders Week (August 31 to September 7) to help commemorate the role both provinces played in achieving Canadian Confederation, including:

- A Tall Ships tour from PEI to Quebec City.
- A bronze statue of William Henry Pope, PEI Father of Confederation and Colonial Secretary in 1864 was unveiled in Charlottetown. A second bronze statue depicting the Chair of the Quebec Conference, Étienne-Paschal Taché greeting Maritime delegates as they arrived to attend the Quebec Conference was unveiled in Quebec City.



**PEI 2014 Fund
- Living Project**

- Island Agriculture: Honouring the Past, Shaping the Future (Farm Centre)
- Commemorative Projects Come to Life
- Confederation Forest Project
- Development of Interpretive Trail
- The Forgotten Father, Robert Poore Haythorne – Interpretative Signage
- Centre Expo Festival
- Legacy Garden at Farm Centre

- Audio/Music

- PEI Symphony Presents 'Celebrate Canada!'
- Music PEI Commemorative CD
- 150 Years of Song
- Letters from the Manse Audio Recording

- A collaboration between the Holland College School of Performing Arts (PEI), the École de danse de Québec and the Quebec City dance company to create a contemporary dance, March/Memory/Dance 2014. The new work was performed in Charlottetown and Old Quebec.
- Designation of June 10-15 as 1864 week in Charlottetown with June 14 declared Quebec Day. The Mayor of Quebec City was on hand to participate in a flag raising ceremony, PEI/Quebec musical exchange, unveiling of the Quebec Garden at Confederation Landing Park, dedication of twin PEI/Quebec seats in the Homburg Theatre at the Confederation Centre of the Arts and a church service, parade and guest book signing.

Other commemorative activities included:

- The release of a new gold collector coin to commemorate the 150th Anniversary of the Charlottetown and Quebec Conferences by the Royal Canadian Mint.
- The issuance of a new commemorative envelope by Canada Post featuring the archival photograph of the Fathers of Confederation in Charlottetown.
- The full connection of the Confederation Trail, PEI's portion of the Trans Canada Trail.

Fifty-eight (58) or 36% of the PEI 2014 Fund Projects were considered legacy projects in that they created a commemorative item that would last beyond the year of celebrations. However, PEI 2014 Fund support for many single event type activities also contributed to building a legacy.

Thirty-nine percent (39%) of PEI 2014 Fund grant recipients noted the experience of having a PEI 2014 project/event helped to build new connections within their community, generate increased awareness of their community and foster new ideas for future events/projects. These outcomes, though intangible, were viewed as having lasting benefits to the community and to ongoing events. In addition, the PEI 2014 Fund assisted in expanding the capacity of various organizations across the Island.

4.3 PEI had the opportunity to host a number of new or National conferences

PEI 2014 Inc. support provided the opportunity for PEI to host a number of new conferences and some major national conferences for the first time.



PEI 2014 Fund - Book/Publication

- Once Upon a Time in Charlottetown: A Foal, Five Kittens and Confederation
- 1864: The Cradle – Illustrative Novel
- Government House Legacy, Research and Interpretation Project
- Genealogy of the PEI Fathers of Confederation
- Epktek Photos Then and Now
- Irish Literacy Society History
- Crossing the Strait
- Children's Book: The Village that Loved Oysters a Tad Too Much
- Public Archives 2014 Almanac

-Video

- The Women of Confederation
- The Lebanese Community on PEI
- Remember Me
- Preserving and Celebrating the History of the PEI Potato Industry



PEI 2014 Legacy

- Sculpture of William Pope; Charlottetown Waterfront
- Sculpture of Étienne-Paschai Taché; Quebec City
- PEI 2014 Theme Song
- Video/photos from celebrations and events
- PEI 2014 contacts database
- Curriculum: 40 online teaching activities in English and French
- Encounters with Canada Education Module; Ottawa
- Aboriginal Youth and Confederation – Learning from the Past and Building for the Future
- A Bold Tomorrow: Women, Leadership and Visioning Canada's Future
- PEI 2014 Winter Celebration Snowmobile Ride
- The Guardians of Confederation
- 2014 Heritage Canada Foundation Annual National Conference: Heritage Revitalization in an Age of Collaboration
- National 4-H Citizenship Seminar
- O'Brien Awards

New conferences included:

- New Canada Conference – 100 delegates ages 19-24 met in PEI for a three-day conference, examining Canada's future and defining a public agenda for the next fifty years, and produced *The New Canada Conference Ideabook*, to help inform and define a public agenda for Canada.
- Annual Conference of the Governor General, Lieutenant Governors and Territorial Commissioners provided an opportunity for education, collaboration and discussion of the role, responsibilities, issues and opportunities of the representatives of the Crown in Canada.
- In partnership with Newspapers Canada, hosted a national newspaper competition titled *The History of the Nation of Canada's Front Pages* to showcase the many ways in which newspapers have shaped Canadian identity and captured our nation's history.

A number of other National Conferences were funded through the PEI 2014 Fund to enable them to be hosted by PEI in 2014. These included:

- National 4-H Citizenship Seminar
- Aboriginal Youth and Confederation – Learning from the Past and Building for the Future
- A Bold Tomorrow: Women, Leadership and Visioning Canada's Future
- O'Brien Awards

- PEI 2014 Winter Celebration Snowmobile Ride
- The Guardians of Confederation
- 2014 Heritage Canada Foundation Annual National Conference: Heritage Revitalization in an Age of Collaboration

4.4 Tourism operations received internationally recognized training

The Tourism Industry Association of PEI (TIAPEI) recognized the tourism potential of PEI 2014 and saw it as an opportune time to provide customer service training to the tourism industry and create awareness about the 2014 celebrations. With funding support from PEI 2014, TIAPEI acquired the rights to offer WorldHost training to tourism operators and their staff, beginning in the fall of 2013 and continuing into the future, as a legacy of the PEI 2014 Celebrations. WorldHost is an internationally recognized training program, first developed in British Columbia, which focuses on the skills and techniques required to provide exceptional customer service and hospitality.

TIAPEI's goal was to train 1,000 customer service professionals. At the end of 2014, 1,261 individuals had received WorldHost training through 72 workshops held at locations across the Province. Participants at over 40% of the workshops noted one of the most useful things they learned at the workshop was information about PEI in general or PEI 2014 in particular.⁵¹

4.5 Students from kindergarten to grade 12 were engaged in the celebrations

An intended objective of PEI 2014 Inc. was to engage students from kindergarten to grade 12 (K-12) in the celebrations marking the sesquicentennial anniversary of the 1864 Charlottetown Conference.

Through funding support from PEI 2014 Inc. and a corporate sponsor, RBC, the RBC Celebrate 2014 School Program was created to reach the 20,000 students and 1,500 teachers in 57 English and 6 French schools in the PEI K-12 community.

The goals of the program were threefold:

- 1) To develop meaningful and interactive in-school and field trip activities related to the theme of 2014 celebrations,
- 2) To develop activities that build pride and awareness among students, educators and parents on the historical significance of the 1864 conference, and
- 3) To leave a learning legacy with regard to PEI's history and role in nation building.

The principal activities and outcomes of the program included:⁵²



Visits to historical sites/events

- 9 sites :
 - Province House
 - Government House
 - Confederation Centre Art Gallery
 - Confederation Players
 - Founders Hall
 - Roma at Three Rivers
 - The Farmers Bank and Doucet House
 - Eptek Centre
 - Acadian Museum in Miscouche
- 3,500 student and 130 teacher participants



Newsletters

- Bilingual paper on Charlottetown Conference
- 9 bilingual newsletters distributed to teachers on historical topics and resources



Other activities

- A historical play tour to Grade 6 classes in 14 schools
- 1,700 students attend another historical play
- PEI 2014 related special edition print materials distributed to schools
- Historical information pieces developed



Development of curriculum activities

- 43 in English; 40 in French
- Customized to various grade levels and existing curriculum
- Available to teachers, students, parents and community members on the PEI 2014 website

Approximately 11.5% of PEI educators participated in a survey at the end of 2014 about the RBC Celebrate 2014 School Program to help measure the level of pride and awareness fostered by the program. Seventy-one percent (71%) felt the RBC Celebrate 2014 School Program increased their own awareness or that of their students of the importance of the Charlottetown Conference. Forty-eight percent (48%) felt the program increased their own pride and identity as an Islander or that of their students. Twenty-four percent (24%) felt program activities will be useful in the future.⁵³

Additionally, over 3,500 youth from across Canada learned about the characters, political circumstances and social activities that forged the beginnings of Canada, through their participation in the PEI 2014 educational module at the Encounters with Canada program in Ottawa.

5.0 PEI 2014 Celebrations Attracted Attendees and Provided a Memorable Experience

5.1 A variety of marketing and promotion sources informed attendees about the celebration

A national promotional tour called The Island Roadshow – Celebrating the Birthplace of Confederation travelled to eight major Canadian cities in October and November of 2013, targeting travel influencers. It told PEI's story and invited Canadians to join the celebrations in 2014 through a cabaret style show with multi-media, music, dance, comedy and a reception featuring Island delicacies. The Island Roadshow generated positive media attention with 106 media outlets or representatives, multiple TV appearances, radio interviews, over 240 media stories in major newspapers across Canada, and activity on social media. Almost 20.6 million media impressions were generated from the Island Roadshow. Media impressions include such measurements as the number of people who may have seen a media story, heard something on the radio, watched something on TV, or read something on a web page or blog.

The PEI 2014 Celebrations utilized multiple social media channels to communicate with the general public and potential participants including a PEI 2014 website, Facebook page, Twitter account, and You Tube videos. From January 2012 to January 2015 there were⁵⁴:

- <http://pei2014.ca>
- 444,376 visits - 93% from Canada - 7% from US, UK, India, France, Japan
 - Peak visitation May to August 2014 - 85,464 visits in August 2015

- <http://tourismpei.com>
- 4,244,657 visits



- PEI2014 10,332 likes
- Î.-P.-É 2014 374 likes



- PEI2014 4,980 followers
- Î.-P.-É 2014 353 followers



- Over 1.2 million views
- 97% for 'More Reasons than Ever to Come to PEI in 2014' contest

The yearlong event also received unpaid media coverage in various off-Island media channels such as news websites, television, community and daily

newspapers, blogs and radio. Between May of 2009 and October 2014, these media channels reached approximately 13.5 million people. The value of this coverage (as estimated by Media Miser) was \$270,104.⁵⁵

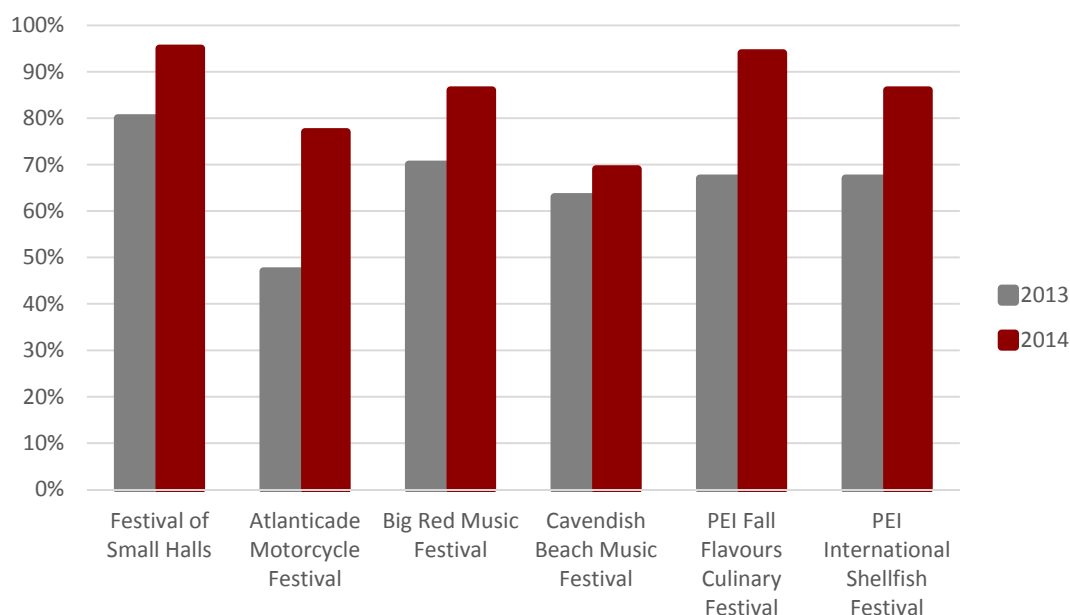
Based on survey results of the various PEI 2014 Production and Supported Events a variety of information sources were used by residents and non-residents to learn about the events. The most frequently used information source per event is noted in Table 7. If another information source was within 5% of the most frequent in terms of use it is also included.

Table 7: A variety of information sources were used by attendee parties to find out about PEI 2014 Celebration events.⁵⁶

Event	Most frequently used information sources	
	Resident	Non-resident
NYE Opening Celebration	Media news item/commentary (67%)	Recommendations from other people (66%)
Canada Day 2014	Facebook (45%) PEI 2014 website (44%)	PEI 2014 website (33%)
Celebration Zone	Outdoor signage (43%)	In Charlottetown and saw venue (34%)
Founders Week Concert	Radio (56%)	Radio (33%) Face book (28%)
Tall Ships Charlottetown and the Feast of the Fathers	PEI 2014 website (29%) Radio (25%)	In Charlottetown and saw venue (27%) Recommendations from other people (25%)
Tall Ships Summerside	Ad or story in the local newspaper (30%) In Summerside and saw venue (27%)	In Summerside and saw venue (34%)
NYE Finale Celebration	Radio (42%)	Recommendations from other people (50%)
ECMW	Not available	Not available
Big Red Music Festival	Attended previously (40%) Facebook (38%) Radio ad (36%)	Facebook (40%)
Meetings & Conventions	Not available	Mentioned at conference (52%)
Rock the Boat MusicFest	Recommendations from other people (36%) Facebook (31%)	Recommendations from other people (53%)
King's Playhouse 2014 Summer Programming	Recommendations from other people (64%)	Recommendations from other people (49%)

Attendees were asked in surveys that were conducted for Signature events and festivals held during the 2013 and 2014 years to indicate their level of awareness of the PEI 2014 Celebrations and interest in attending the events. A Likert scale of 1 (not at all interested) to 7 (very interested) was used. A range of 47% to 80% rated their awareness of the PEI 2014 Celebrations as a “6 or 7” in 2013. In 2014 awareness increased significantly with a range of 69% to 95%. There was an increase in awareness of both resident and non-resident attendees of these Signature Events. Awareness amongst resident attendees in 2014 was between 96% and 99%, up from 2013 where awareness ranged from 75% to 91%. Awareness amongst non-residents had ranged from 14% to 50% in 2013, increasing in 2014 to range from 56% to 87%.⁵⁷

Figure 22: Awareness of PEI 2014 Celebrations changed significantly from 2013 to 2014 indicating that marketing and promotion efforts were effective.⁵⁸



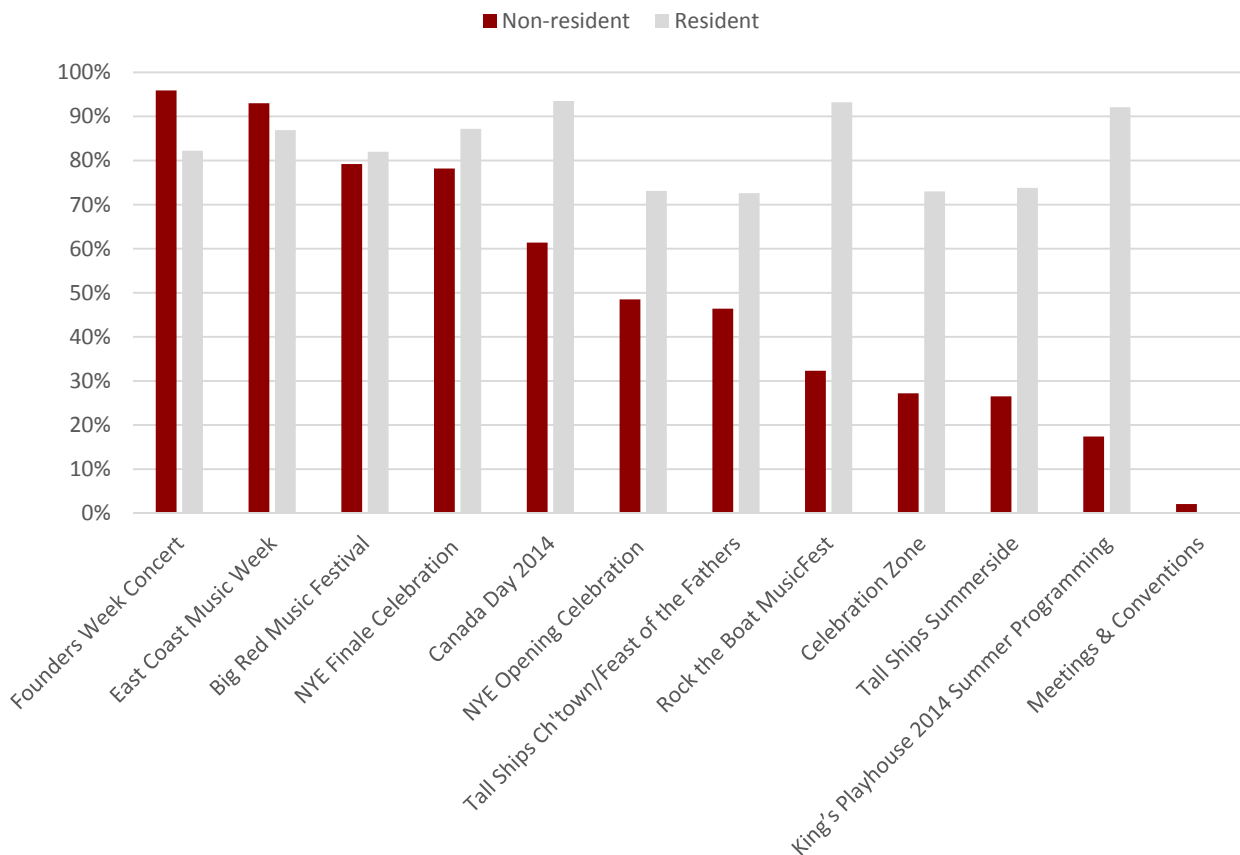
5.2 PEI 2014 programming motivated people to visit and take part in the celebration

Non-residents were more aware of concert events like the Founders Week Concert and Big Red Music Week before travelling to PEI (91% to 96%), while awareness for events like the Celebration Zone had lower awareness (53%) before travelling. Other PEI 2014 Production and Supported Events had awareness levels ranging

from 61% to 86%. PEI 2014 Fund Events where attendees were surveyed had awareness levels ranging from 32% (Kings Playhouse 2014 Summer Programming) to 77% (Rock the Boat MusicFest).⁵⁹

Non-residents indicated that the influence of the PEI 2014 Production or Supported event on their travel to PEI ranged from 2% (Meetings & Conventions PEI) to 96% (Founders Week Concert). PEI residents were most influenced to travel to the host region by Canada Day activities at the Charlottetown Event Grounds (94%). Rock the Boat MusicFest and Kings Playhouse 2014 Summer Programming also had a strong influence on PEI resident’s decision to travel to the host region.⁶⁰

Figure 23: Founders Week Concert had the greatest influence of all PEI 2014 Production or Supported Events on non-resident’s decision to travel to PEI.⁶¹



The percentage of first time non-resident visitors to PEI attending PEI 2014 Production or Supported Events ranged from 6.0% (Big Red Music Festival) to 30% (Meetings & Conventions PEI delegates). For the two PEI 2014 Fund Events where attendees were surveyed the percentage of first time non-resident visitors attending ranged from 11% (Rock the Boat MusicFest) to 16% (Kings Playhouse 2014 Summer Programming).⁶²

The percentage of non-resident parties, rating a “4 or 5” on a Likert scale where 1 = not at all likely and 5= definitely likely, in regards to likelihood of travelling to PEI for another PEI 2014 Production or Supported Event ranged from 17% (Founders Week Concert) to 34% (Canada Day). For the two PEI 2014 Fund Events where attendees were surveyed the likelihood (using same Likert scale) of travelling to PEI for another PEI 2014 Production or Supported Event ranged from 7% (Kings Playhouse 2014 Summer Programming) to 24% (Rock the Boat MusicFest).⁶³

5.3 PEI hosted a professionally organized celebration that provided attendees with a first class memorable experience

Attendees at PEI 2014 Production and Supported Events were surveyed as to their overall satisfaction, service in both official languages of Canada and accessibility of event sites. Results are presented in Sections 5.3.1 to 5.3.3.

5.3.1 Attendee satisfaction at PEI 2014 Production and Supported Events was high

A very important aspect in evaluating any event, is the overall satisfaction of attendees. Surveys of attendees of the various events that took place throughout 2014 included questions to gauge satisfaction.

The PEI 2014 Production Events were generally well received and attendees were overall satisfied. The percentage of favourable responses to the overall satisfaction with each event ranged from a low of 77% to a high of 92% of attendees who rated events “4 or 5” on a Likert scale where 1 = very dissatisfied and 5 = very satisfied. Other events supported by PEI 2014 had very high satisfaction levels (90% to 98% using the same Likert scale). Common areas for most of the events in which satisfaction was lower related to selection of food and beverage, cost of food and beverage, and ease of parking. Overall the satisfaction of attendees was generally

good, with only minor differences between resident and non-resident responses in some circumstances.

Resident and non-resident attendees at the PEI 2014 Production and Supported Events were asked about their likelihood of taking part in more or recommending PEI 2014 events to others. Fifty percent (50%) or more of resident attendees rated the likelihood of taking part in more PEI 2014 events a “4 or 5” (using a Likert scale where 1 = strongly disagree and 5=strongly agree) and 60% or more of resident attendees rated the likelihood of recommending PEI 2014 events to others a “4 or 5” using the same Likert scale. In all cases the likelihood of recommending was higher than the likelihood of attending themselves.

Using the same Likert scale, 21% or more of non-resident attendees rated their likelihood of taking part in more PEI 2014 events a “4 or 5” and 53% or more of non-resident attendees rated the likelihood of recommending PEI 2014 events to others a “4 or 5”. Similar to residents, the likelihood of recommending was higher than the likelihood of attending themselves. Given the decision to attend another PEI 2014 event by a non-resident would involve the additional expense of travel to PEI, it was not surprising that the percentages for non-residents were lower than residents in most of the events. In the case of PEI 2014 Supported Events, the survey questions in relation to the likelihood of attending more events or recommending to others were worded differently. They referred to the specific event attended or recommending PEI in general and not to PEI 2014 Celebrations specifically. In the case of the two specific PEI 2014 Fund events the questions were similarly worded to the PEI 2014 Production Events survey questions.

Residents were asked in surveys that were conducted for PEI 2014 Production and Supported Events and other major events and festivals held during the 2014 year (Jack Frost Children’s Winterfest, Festival of Small Halls, Atlanticade Motorcycle Festival, Cavendish Beach Music Festival, PEI Fall Flavours Culinary Festival, and PEI International Shellfish Festival) to indicate their level of agreement with the statement “I am supportive of the PEI 2014 Celebrations.” A Likert scale of 1 (strongly disagree) to 5 (strongly agree) was used. A range of 63% to 86% rated their support of the PEI 2014 Celebrations a “4 or 5”. The mean value ranged from 3.76 to 4.32 out of 5. Overall there was a strong level of support for PEI 2014 Celebrations by those who attended PEI 2014 events and other events during 2014 with the strongest support received at PEI 2014 Production or Supported Events (77% to 86% rated a “4 or 5”). Residents at non-supported events had support levels ranging from 63% to 78% rating a “4 or 5”.⁶⁴

Table 8: Attendee party satisfaction and likelihood of attending other and likelihood of recommending PEI 2014 Production and Supported Events.⁶⁵

Event	% of Attendees Satisfied with Event	Resident likelihood of attending more events	Non-resident likelihood of attending more events	Resident likelihood of recommending to others	Non-resident likelihood of recommending to others
NYE Finale Celebration – free family event	92%	n/a	n/a	n/a	n/a
NYE Finale Celebration – indoor ticketed concert	91%	n/a	n/a	n/a	n/a
Celebration Zone	91%	71%	22%	82%	70%
Tall Ships Charlottetown and the Feast of the Fathers	89%	58%	32%	60%	66%
NYE Opening Celebration – free outdoor event	89%	83%	53%	83%	53%
Founders Week Concert	88%	50%	21%	68%	59%
Canada Day 2014	88%	80%	42%	80%	83%
NYE Opening Celebration – indoor ticketed concert	82%	83%	53%	83%	53%
Tall Ships Summerside	77%	66%	22%	75%	65%
ECMW	98%	83%	77%	95%	81%
Rock the Boat MusicFest	98%	68%	40%	74%	71%
King’s Playhouse 2014 Summer Programming	96%	67%	29%	77%	69%
Meetings & Conventions	94%	n/a	93%	n/a	95%
Big Red Music Festival	90%	67%	30%	70%	57%

5.3.2 Service in both official languages was rated as good or excellent by 62% or more of attendees and represented at almost 50% of PEI 2014 Fund Events/Projects

An evaluation of service in both official languages of Canada was completed for the five PEI 2014 Production Events. East Coast Music Week attendees were also asked to evaluate the services provided in the official languages. Attendees of these events were asked to rate the services provided in the official language applicable to them and their travel party while attending the event, using a Likert scale from 1 (very poor) to 5 (excellent).

All events scored well in their service in English with both residents and non-residents, with 90% or more attendees rating their service in English at a “4 or 5”. Service in French, meanwhile, was lower in all events. Evaluations for service in French at the events ranged from a low of 62% (Tall Ships, Summerside) and a high of 79% (Tall Ships, Charlottetown and Feast of the Fathers) of residents and non-residents rating their service in French at a “4 or 5”. The mean value of ratings ranged from 3.79 to 4.29 for French and 4.62 to 4.77 for English.⁶⁶

In addition to the aforementioned events, many of the events/projects supported by the PEI 2014 Fund represented both of Canada’s official languages. Based on the reports provided by PEI 2014 Fund recipients, 48% of recipients reported that both Canada’s official languages were represented in their project or event. The percent representation was highest among large size grant recipients at 63%. Small fund projects with more limited resources had official language representation of some type at 40% of their projects or events.⁶⁷

5.3.3 PEI 2014 provided good accessibility at PEI 2014 Production Events and 83% of PEI 2014 Fund event sites were accessible

Accessibility of the event sites including factors such as wheelchair access and ease of access for seniors was an important consideration in the planning of PEI 2014 Production Events. This aspect was rated on a Likert scale (1=very poor; 5=excellent). The percentage of residents and non-residents who rated the accessibility of sites a 4 or 5 ranged from 58.5% for the NYE Opening Celebration free outdoor event to a high of 89% for the Celebration Zone. Other PEI 2014 Production Events ranged from 63.4% to 87.7% in rating a “4 or 5” for accessibility of sites. The mean value of ratings ranged from 3.53 to 4.98. Overall PEI 2014 provided good accessibility at the Production Events.⁶⁸

Eighty-three percent (83%) of event sites supported by the PEI 2014 Fund were accessible to persons with disabilities and 10 of the midsize and large grants received an Accessibility Designation from Access Advisor PEI (8 full mobile accessible and 2 partially accessible). The two large grant projects which had more detailed research completed were rated on a Likert scale (1=very poor; 5=excellent) in terms of accessibility. The percentage of residents and non-residents who rated the accessibility of sites a 4 or 5 were 93.1% for King's Playhouse 2014 Summer Programming and 79.8% for Rock the Boat MusicFest. The mean value of ratings respectively were 4.66 and 4.18.⁶⁹

6.0 PEI 2014 Celebrations were a Tourism and Economic Success

In recognition of the PEI 2014 Celebrations occurring the Tourism Advisory Council of Prince Edward Island had set a target of 5% increased tourism revenues for 2014. This was exceeded with a 5.1% increase.⁷⁰ Total direct tourism expenditures were the highest experienced in any of the past 10 years. 2014 experienced the highest visitation in the last 10 years and exceeded 2013 visitation by 2.7%.⁷¹

A comparison of 2014 tourism indicators to the 2013 year shows an increase in traffic indicators such as bridge, air and motorcoach but a decline in ferry and cruise. It is important to note that cruise had achieved a significant increase of 36% in 2013. Overnight stays were up 6.4%, the largest increase in the five years of data shown in Table 9. Year to date indicators for 2015 as of September, 2015, show an increase in overnight stays over 2014 of 2%, improving on the 2014 record.⁷²

Table 9: A comparison of tourism indicators 2010 to 2015 YTD (Sept.)⁷³

	2015 – YTD (as of Sept.)	2014	2013	2012	2011	2010
Traffic						
-Bridge ⁷⁴	6.0%	2.3%	-3.0%	-0.6%	-3.7%	7.7%
-Air ⁷⁵	-2.4%	7.3%	-0.3%	4.3%	-1.5%	4.3%
-Ferry ⁷⁶	9.8%	-3.3%	-3.0%	2.1%	-4.9%	2.7%
-Cruise ships ⁷⁷	-1.7%	-8.5%	35.7%	10.6%	-2.5%	7.2%
-Motorcoach ⁷⁸	8.6%	1.3%	2.8%	-11.8%	13.8%	7.4%
Overnight stays⁷⁹	2.0%	6.4%	1.2%	-0.2%	-1.6%	1.5%

Spending by tourists in PEI circulates and re-circulates within the economy, multiplying the effects of the original expenditures on overall economic activity. This process is referred to as the economic multiplier effect and operates at several levels. The initial expenditures of the tourists on accommodation and food are generally referred to as the direct costs of operation and their effects are referred to as the direct effects. Subsequent purchases by suppliers of materials and services to sustain the original and derivative expenditures are called the indirect effects. The induced effects emerge when workers in the sectors

stimulated by initial and indirect expenditures spend their additional incomes on consumer goods and services. The effects of the spending by tourists in PEI in 2014 and particularly as it relates to the PEI 2014 Celebrations are shared in Section 6.1.

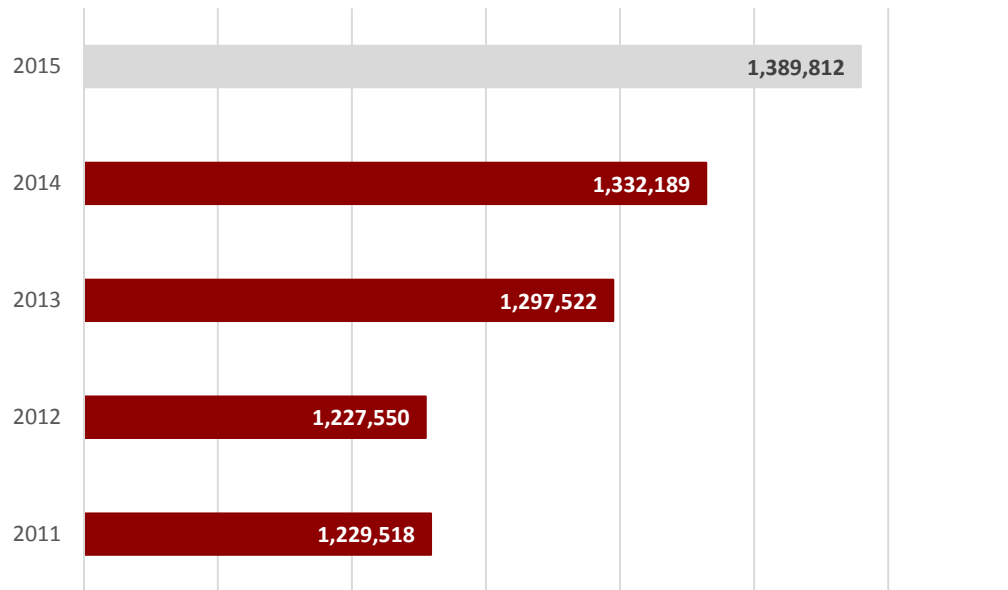
PEI 2014 Inc. was tasked with organizing and promoting the PEI 2014 Celebrations. An effort of this scale involves methodical preparation, rigorous planning and promotion. Considerable effort and resources went in to planning and implementing the PEI 2014 Celebrations with expenditures of \$26.7 million. These expenditures also generated a large stream of economic benefits for PEI which are shared in Section 6.2.

6.1 Direct tourism expenditures resulting from the PEI 2014 Celebrations had an impact on the economy

6.1.1 A total tourism visitation increase of 2.7%

2014 experienced the **highest visitation in the last 10 years**. Visitation in the province in 2014 was 1,332,189, **a 2.7% increase** over 2013. As of the end of September, 2015 visitation was up 5.8% compared to the same time period in 2014 and forecast for the 2015 year is that visitation will be up by 4.3% for the year. Ninety-three percent (93%) of visiting parties stayed at least one night in PEI in 2014, up slightly (1%) from 2012.⁸⁰

Figure 24: Visitation in the province in 2014 was 1,332,189, a 2.7% increase over 2013⁸¹



Note: 2015 figures include forecasted numbers for October to December.

PEI's increase in visitation was slightly below the national average but exceeded NB and Newfoundland and Labrador (NL) growth. Canada experienced a 3.2% increase in international visitors from 2013 to 2014 while a 3% increase in overall visitation was experienced in NS and 2% in NB and NL. Globally the visitation increase was 4.7%.⁸²

Overall, 68.2 % of parties who visited PEI in 2014 were aware of the PEI 2014 Celebrations before they travelled to PEI. Visitor parties from NB and NS had the greatest awareness at over 70%. The US and the rest of Canada had over 60% awareness.⁸³

Those who were aware of, and participated in, the PEI 2014 Celebrations indicated that the celebrations accounted for 29.2% of their decision to travel to PEI in 2014. For same-day parties the influence was 48.4%. For overnight visitors, the level of influence was highest for visitors from NS (41.5%) and NB (33%).⁸⁴

Although the influence was significant for parties who were aware of the PEI 2014 Celebrations before travelling (29% to 48%), when all parties (regardless of their awareness of or participation in the PEI 2014 Celebrations) are considered the

overall influence of the PEI 2014 Celebrations on all visitors' decision to visit PEI in 2014 declines to 4.6%.⁸⁵

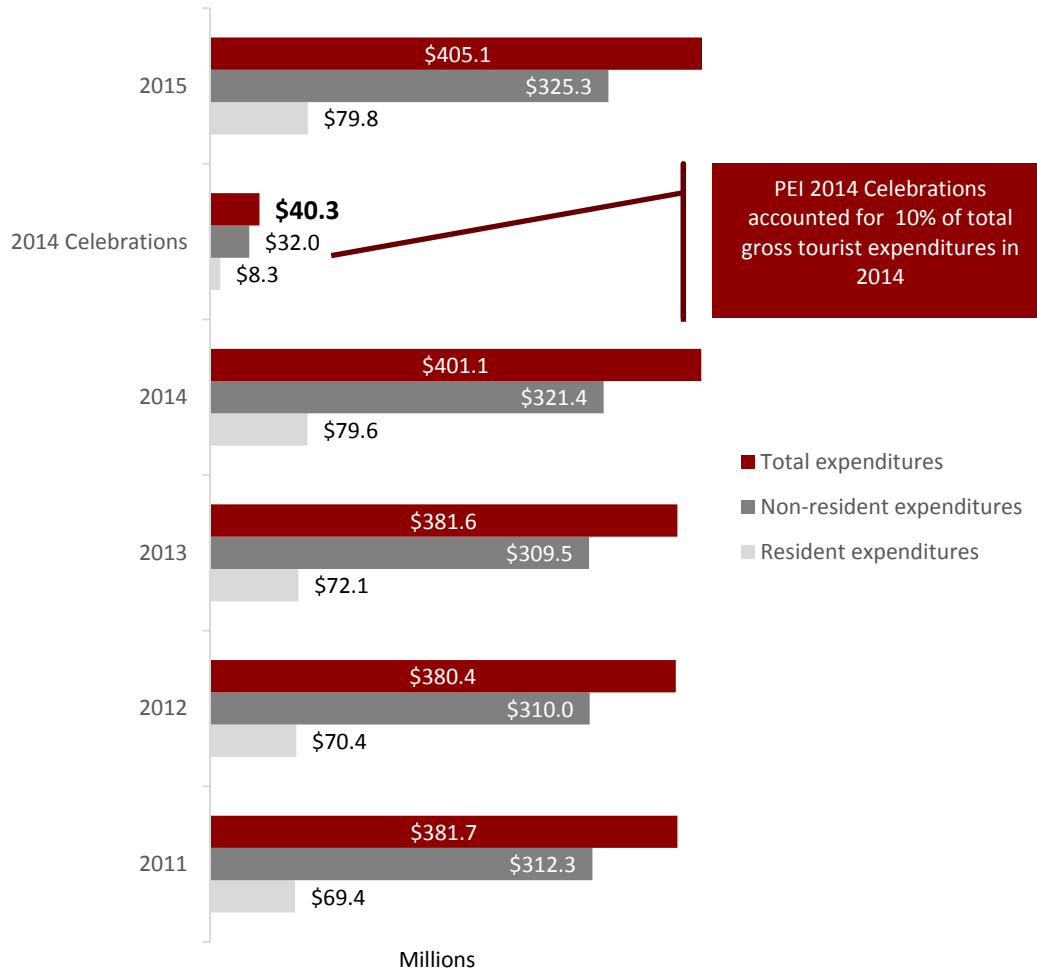
6.1.2 A 5.1% increase in direct tourism expenditures

Direct tourism expenditures (residents and non-residents) were \$401.1 million in the province in 2014, **a 5.1% increase over 2013 and a higher level than any of the past 10 years**. Total expenditures that resulted from the PEI 2014 Celebrations were estimated at **over \$40.3 million**, accounting for **10% of total** estimated direct tourism expenditures in 2014.⁸⁶

Direct tourism expenditures that resulted from the PEI 2014 Celebrations were estimated by CTR using several sources of information. For non-residents, the expenditures were estimated using the results from the 2014 PEI visitor exit survey, 2014 PEI survey of motor coach passengers, 2014 PEI survey of cruise ship passengers, and the 2014 PEI survey of Meetings & Conventions PEI delegates. From these survey results, the influence factor of the PEI 2014 Celebrations/ events on the decision to travel to PEI was applied to each expenditure category to determine the expenditures that resulted from the PEI 2014 Celebrations. The expenditure amount also includes residents' expenditures only for those residents who travelled more than 40 kilometres one-way to attend a PEI 2014 event. Expenditures for this group of residents that resulted from the PEI 2014 Celebrations were estimated using the results of the surveys of attendees of PEI 2014 Production and Supported Events and four events that were recipients of large grants from the PEI 2014 Fund.

It is important to note that although the percentage increase in visitation fell behind the national percentage increase in visitation, the percentage increase in direct tourism expenditures exceeded the percentage increase in direct tourism expenditures for Canada and NB and was almost on par with NL. Tourism expenditure in Canada overall was up 3.3% in 2014, following a 1.1% gain in 2013. Prince Edward Island had experienced a 0.3% increase in 2013. Elsewhere in the region, increases from 2013 to 2014 were 3% in NB and 5.2% in NL. Results were not yet public for NS at the time of writing this report.⁸⁷

Figure 25: Direct tourism expenditures increased by \$19.5 million or 5.1% over 2013. PEI 2014 Celebrations accounted for \$40.3 million of direct tourism expenditures.⁸⁸



Note: 2015 figures include forecasted numbers for October to December.

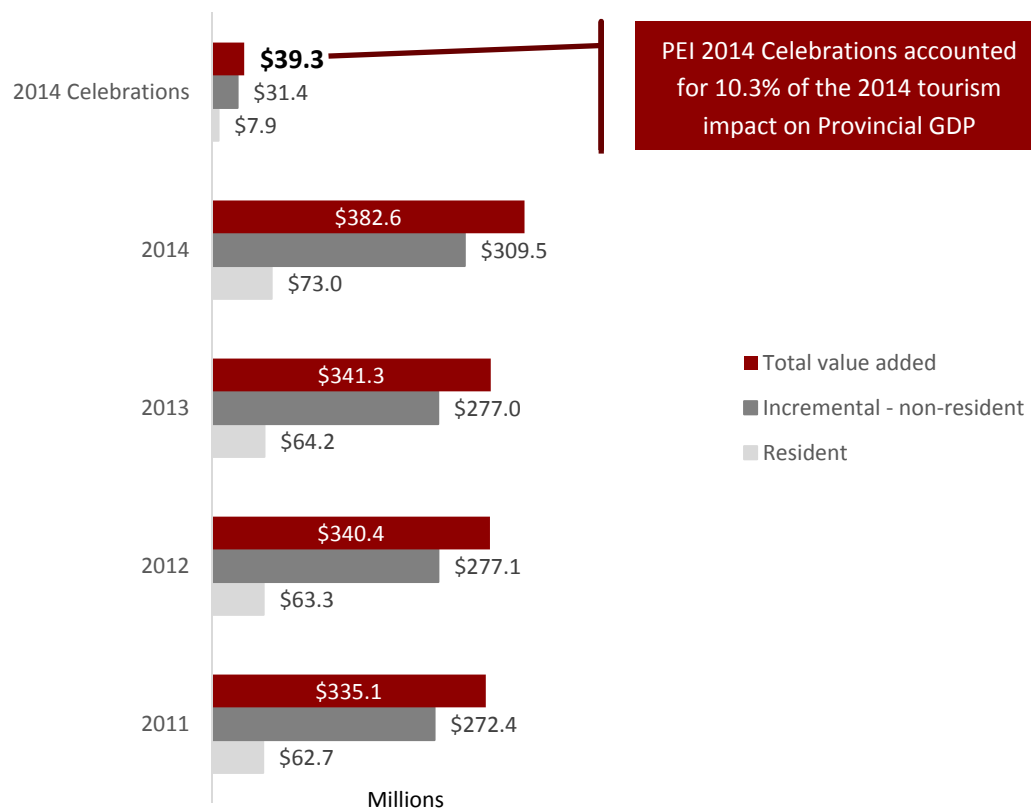
6.1.3 PEI 2014 Celebrations contributed \$39.3 million to provincial GDP (10% of the 2014 tourism contribution to GDP)

Tourism expenditure of over \$401 million resulted in a contribution of about \$382.6 million to the provincial gross domestic product (GDP) in 2014, a \$41.3 million (or 12%) increase over 2013. GDP is one of the primary measures used to evaluate the health of the economy. An increase in GDP is a sign the economy is doing well. Eighty-one percent (81%) of GDP results from non-resident tourism

expenditures and can be considered incremental. Tourism accounted for 6.4% of the provincial GDP in 2014.⁸⁹

PEI 2014 Celebrations accounted for **\$39.3 million of the contribution to the provincial GDP** in 2014 a significant component of the increase over 2013. Eighty percent (80%) of the impact on provincial GDP results from non-resident expenditure.⁹⁰

Figure 26: Tourist expenditures impacted GDP by \$382.6 million in 2014 an increase of \$41.3 million or 12% over 2013. PEI 2014 Celebrations contributed \$39.3 million in GDP.⁹¹



6.1.4 PEI 2014 Celebrations sustained 799 person years of employment

A total of 7,741 person years (full-time equivalent (FTE)) of employment were sustained by total tourism expenditures in the province in 2014, an increase of 339 FTEs compared to 2013. Of the total, 6,361 person years can be considered as

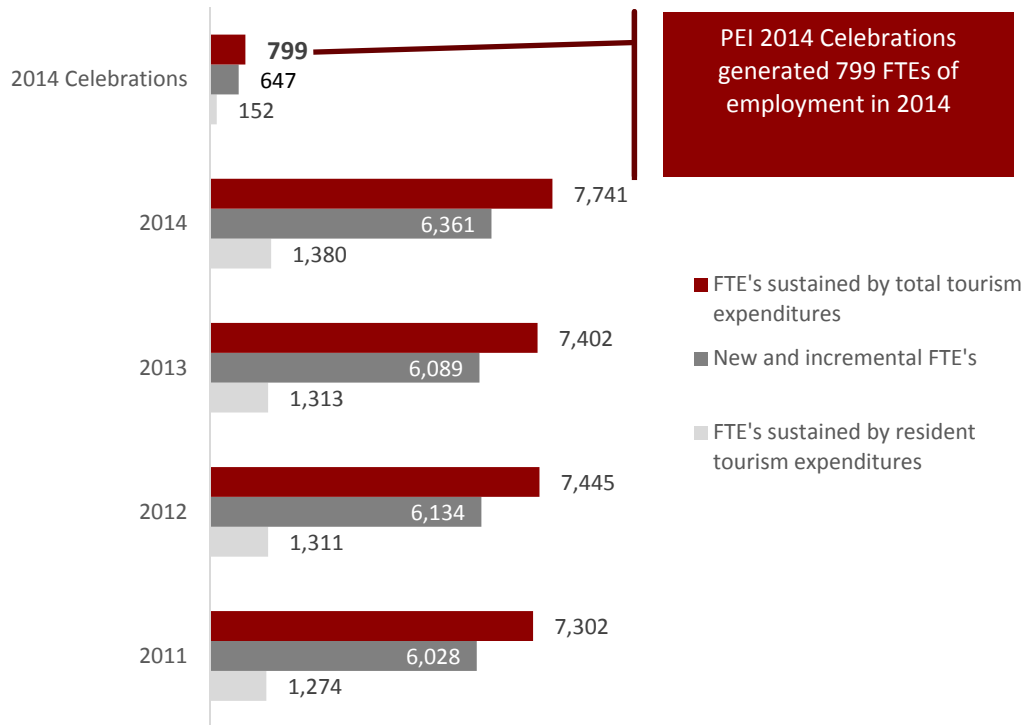
new and incremental employment. Of the 7,741 person years of employment 4,180 is direct employment with 3,561 being indirect and induced FTE jobs.⁹²

A total of **799 person years of employment** (647 new and incremental) were generated by the incremental tourism expenditures associated with the PEI 2014 Celebrations, indicating that without the PEI 2014 Celebrations the 2013 levels would not have been exceeded or even met. Of the 799 person years of employment 442 is direct employment with 357 being indirect and induced FTE jobs.⁹³

Table 10: PEI 2014 Celebrations sustained 799 person years of employment⁹⁴

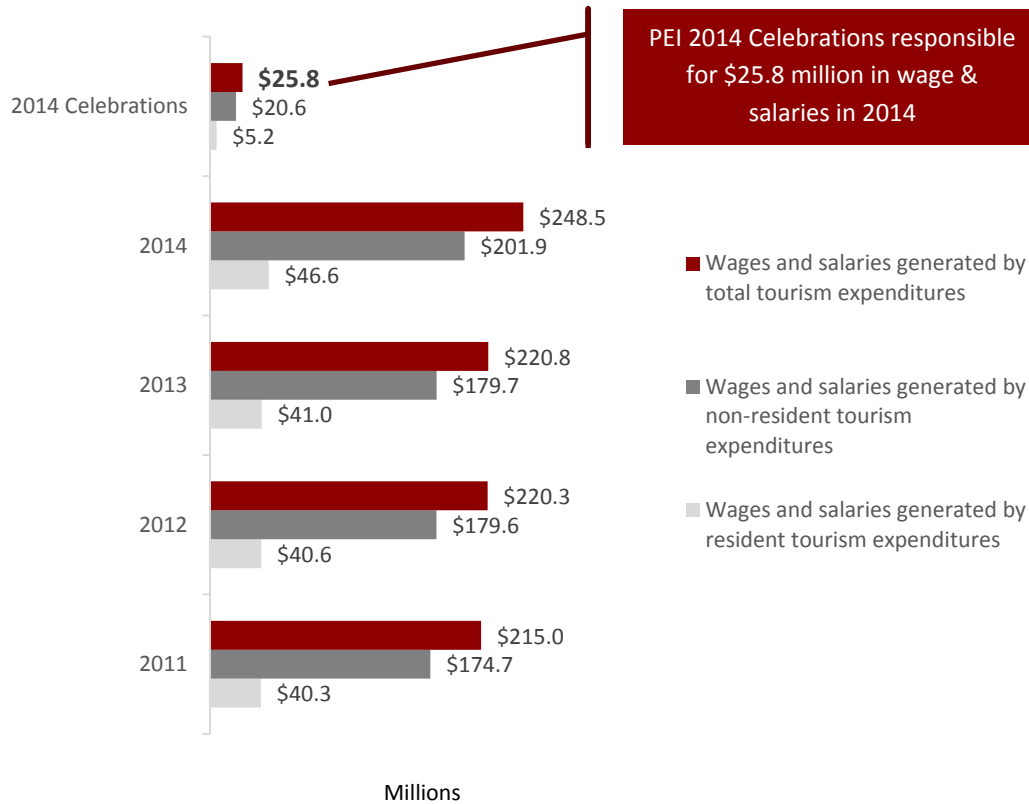
	Employment (person years) Non-resident spending impact	Employment (person years) Resident spending impact	Total Employment (person years)
Direct	363	79	442
Indirect & induced	284	73	357
Total	<u>647</u>	<u>152</u>	<u>799</u>

Figure 27: 7,741 person years (FTE) of employment are sustained by 2014 tourism expenditures, an increase of 339 FTEs over 2013. PEI 2014 Celebrations accounted for 799 FTEs.⁹⁵



Wages and salaries generated by the total tourism expenditures were approximately \$248.5 million in 2014, an increase of \$27.7 million over 2013. The **wages and salaries** generated by the incremental tourism expenditures of PEI 2014 Celebrations were almost **\$25.8 million** accounting for the majority of the increase over 2013.⁹⁶

Figure 28: 2014 tourism expenditures generated wages and salaries of \$248.5 million, a \$27.7 million or 12.6% increase over 2013. PEI 2014 Celebrations accounted for 25.8 million in generated wages and salaries.⁹⁷

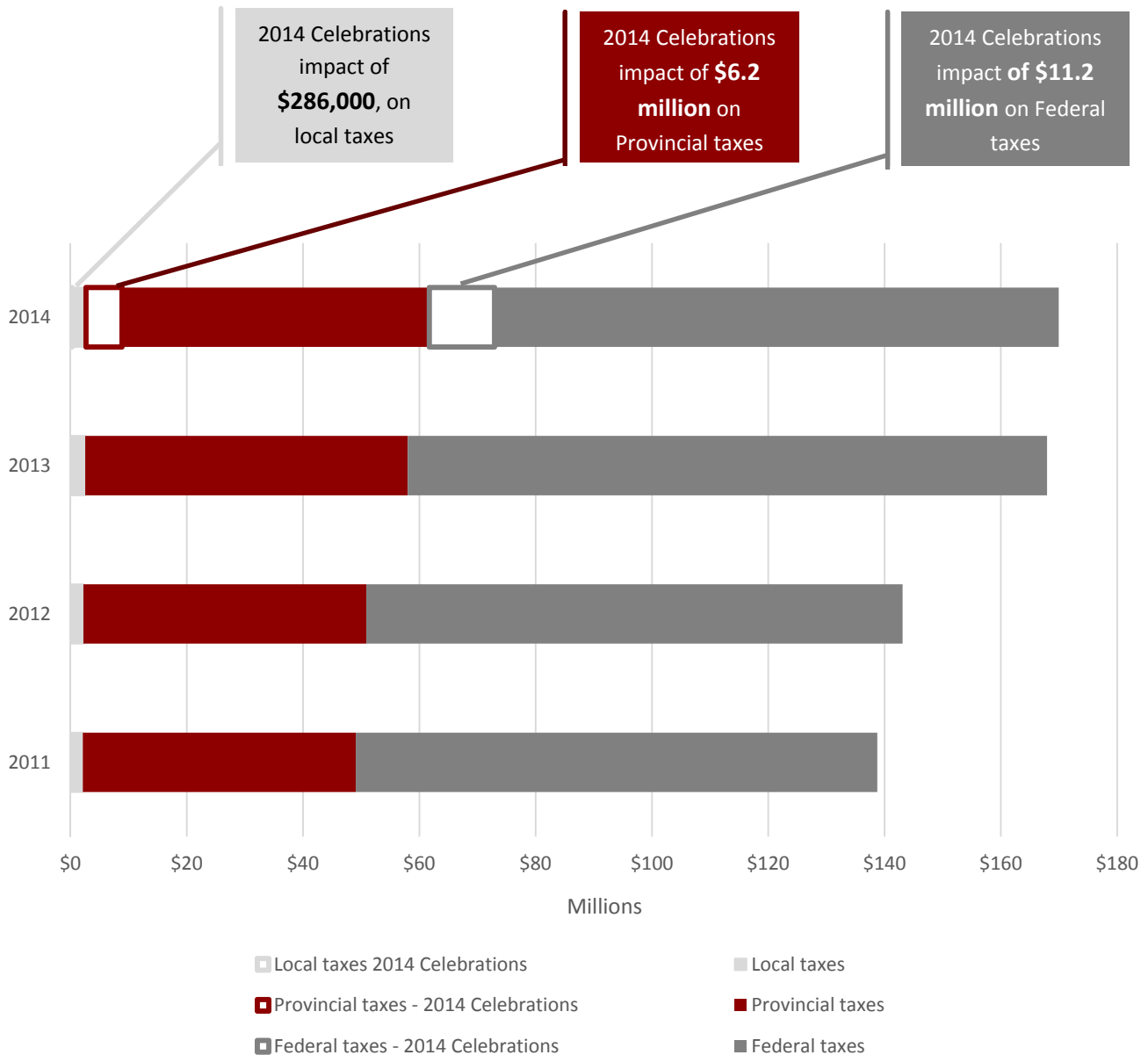


6.1.5 Tourism expenditures influenced by PEI 2014 Celebrations contributed \$17.7 million in taxes

The three levels of government recovered \$169.9 million in tax revenues on the tourism impacts in 2014. Federal government collected \$108.2 million in 2014, an increase of \$5.3 million over 2013. Provincial government collected \$59.0 million in 2014, an increase of \$3.5 million over 2013. Local governments collected almost \$2.7 million in 2014, an increase of \$136,000 over 2013.⁹⁸

The PEI 2014 Celebrations contributed a total of almost **\$17.7 million in taxes** with \$11.2 million to the federal government, \$6.2 million to the provincial government and \$286,000 to local governments. All three levels of government would have experienced a decline in taxes compared to 2013 had the PEI 2014 Celebrations not been held in 2014.⁹⁹

Figure 29: The three levels of government recovered \$169.9 million in tax revenues on the tourism impact of 2014, an increase of \$8.9 million over 2013. PEI 2014 Celebrations contributed \$17.7 million in tax revenues.¹⁰⁰



Tax revenues contributed by the PEI 2014 Celebrations consisted of a variety of tax types federally, provincially and locally. Table 11 shows the impact by type.

Table 11: Tax Impacts of Tourism Incremental Expenditures PEI 2014 Celebrations (Thousands of 2014 Dollars)¹⁰¹

Tax Revenue by Type	Federal	Provincial	Local	Total
Personal income tax	\$ 5,224	\$ 2,878	\$ -	\$ 8,102
Indirect business tax	-	2,512	-	2,512
Goods & services tax	1,539	-	-	1,539
Corporate profit taxes	787	399	-	1,186
Property and business tax	-	-	286	286
Employment insurance	1,390	-	-	1,390
Workers compensation insurance	-	391	-	391
CPP contributions	2,271	-	-	2,271
Total	\$ 11,211	\$ 6,180	\$ 286	\$ 17,677

6.2 PEI 2014 Inc. organizational expenditures had an impact on the economy

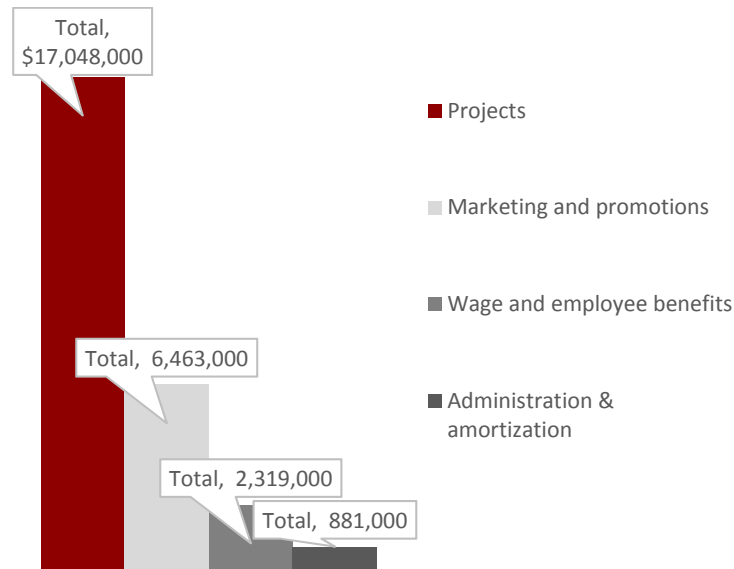
Planning for 2014 to be a yearlong celebration for PEI and Canada began in 2011 with the establishment of PEI 2014 Inc., a non-profit entity under the laws of PEI to plan, manage, and execute the commemorative activities for the 150th anniversary of the 1864 historic events leading to Confederation.

With input from Islanders through the PEI 2014 Planning Forum held in December of 2011, PEI 2014 Inc. worked with many federal and provincial government partners to design an engaging and memorable program for residents and visitors; a program that was to honour the past, celebrate the present and plan a bold tomorrow.

6.2.1 Organizational expenditures

Total expenditures for the PEI 2014 Celebrations were incurred over a 42 month period from August 24, 2011 to March 31, 2015 and amounted to \$26.7 million.

Figure 30: PEI 2014 Inc. incurred \$26.7 million in expenditures (August 24, 2011 to March 31, 2015).¹⁰²



Sixty-four percent (64%) or over \$17 million of total expenditures went towards various **projects** including five major PEI Production Events and programs developed and presented specifically for 2014 and one time funding to support a number of existing PEI festivals and events for enhancements in 2014. This also included almost \$4.7 million in grants (PEI 2014 Fund) to support community groups and arts and heritage organizations to create a special project or event for the Sesquicentennial. Approximately \$8.6 million was expended on event management and programming for the numerous events that occurred throughout 2014.¹⁰³

Marketing and promotions activities represented 24% or almost \$6.4 million of total expenditures and included advertising by way of broadcasting, online and social media, print, market research, promotional materials, web and creative services along with various other activities.¹⁰⁴

Wages, employee benefits and administration comprised 12% or \$3.2 million of the total expenditures. Administration costs were primarily spent on communication, office supplies, transportation and travel.¹⁰⁵

6.2.2 PEI 2014 Inc. expenditures contributed \$25.2 million to provincial GDP

PEI 2014 Inc. expenditures resulted in a contribution of about \$25.2 million to GDP over the August 24, 2011 to March 31, 2015 period. The economic impacts associated with these expenditures are not recurrent and represent the sum of the contributions over the forty-two month period noted above.¹⁰⁶

6.2.3 PEI 2014 Inc. expenditures created or maintained 542 person years of employment

The operating expenditures of \$26.7 million served to create or maintain **542 FTE jobs** in PEI during the period August 24, 2011 to March 31, 2015 (planning and implementation phases) and over **\$17.5 million in wages and salaries**. The largest employment contribution was made by the projects' related expenditures with over 388 person years (72% of total FTEs).¹⁰⁷

Table 12: PEI 2014 Inc. sustained 542 person years of employment¹⁰⁸

	Administrative Expenditures	Marketing Expenditures	Projects Expenditures	Total Employment (person years)
Direct	7	74	222	302
Indirect & induced	6	67	166	240
Total	<u>13</u>	<u>141</u>	<u>388</u>	<u>542</u>

6.2.4 PEI 2014 Inc. expenditures contributed \$11.8 million in taxes

On the fiscal level and the level of incidental taxation, the Federal government collected \$7.7 million in revenue, the PEI provincial government gained \$3.9 million and local governments benefited from \$157,000 in taxes for a total of almost **\$11.8 million in taxes**.¹⁰⁹

Table 13: Tax Impacts of PEI 2014 Inc. Expenditures (Thousands of 2014 Dollars).¹¹⁰

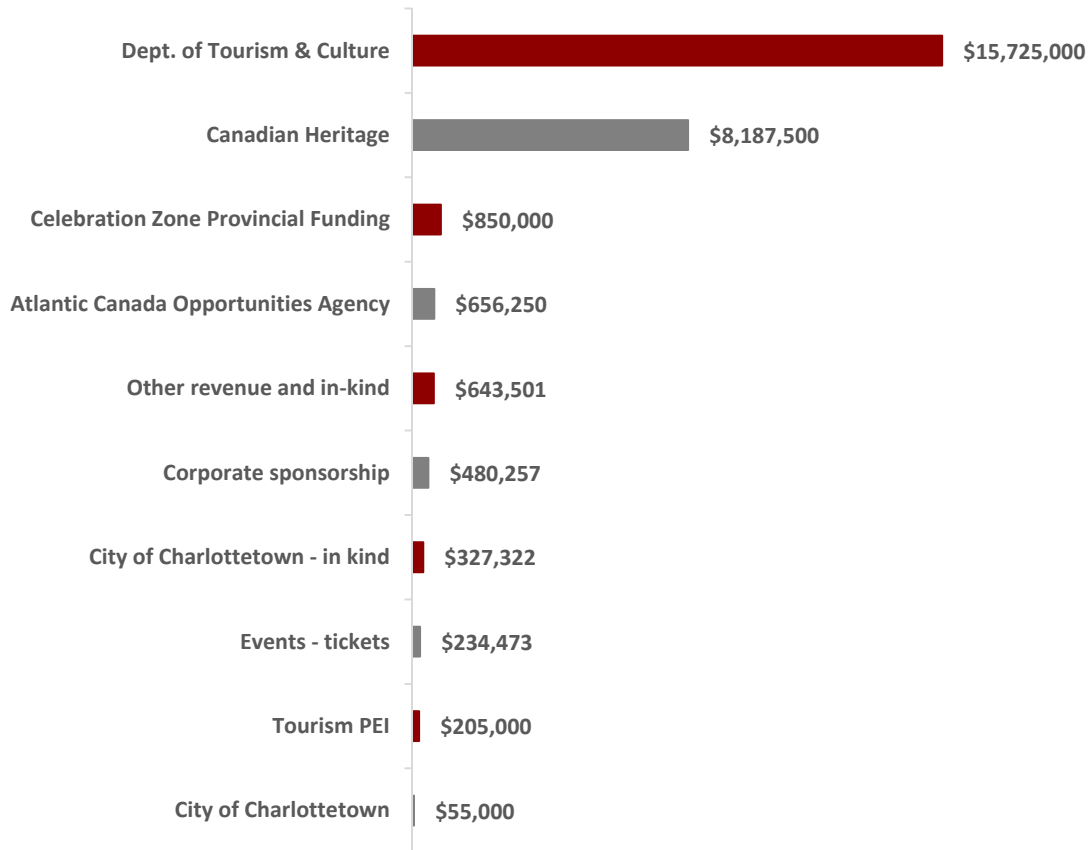
Tax Revenue by Type	Federal	Provincial	Local	Total
Personal income tax	\$ 3,643	\$ 2,007	\$ -	\$ 5,650
Indirect business tax	-	1,376	-	1,376
Goods & services tax	1,075	-	-	1,075
Corporate profit taxes	449	228	-	677
Property and business tax	-	-	157	157
Employment insurance	970	-	-	970
Workers compensation insurance	-	273	-	273
CPP contributions	<u>1,584</u>	<u>-</u>	<u>-</u>	<u>1,584</u>
Total	<u>\$ 7,721</u>	<u>\$ 3,884</u>	<u>\$ 157</u>	<u>\$ 11,762</u>

6.2.5 Revenue

Revenue of almost \$27.4 million was received toward the PEI 2014 Celebrations. Approximately \$26 million was received from federal, provincial and municipal government sources while corporate sponsorship, in-kind, and event ticket sales comprised \$1.4 million in revenue.¹¹¹

Seven provinces (NS, Ontario, Alberta, Manitoba, British Columbia, NB and Saskatchewan) signed on to take part in the PEI 2014 Celebration Zone, sponsoring a week whereby they showcased their unique cultural and culinary offerings, and provided a combined contribution of \$850,000.¹¹²

Figure 31: PEI 2014 Inc. received revenue of \$27.4 million from various sources (August 24, 2011 to March 31, 2015).¹¹³



6.3 Summary of economic impact of tourism spending and organizational expenditures

PEI 2014 Celebrations built pride and awareness among Island residents and other Canadians about PEI's important role in Confederation and resulted in good economic value for PEI. The \$26 million investment of public money for hosting the yearlong celebration generated 2.5 times more in gross domestic product due to the tourism expenditure and the organizational expenditures associated with the event. If all the taxes collected by the various levels of government are taken into account, this ratio climbs to 3.6. For every \$1.00 of public money invested \$3.62 was contributed to gross domestic product and taxes.

Table 14: Every \$1.00 in public investment resulted in a \$3.60 return on investment¹⁴

Description	Expenditure	Employment Impacts	Impact on Gross Domestic Product	Tax Impacts	Total Impact
PEI 2014 related tourism spending	\$40,300,000	799	\$39,300,000	\$17,700,000	\$57,000,000
PEI 2014 Inc. expenditures	26,700,000	542	<u>25,200,000</u>	<u>11,800,000</u>	<u>37,000,000</u>
			<u>\$64,500,000</u>	<u>\$29,500,000</u>	<u>\$94,000,000</u>
Return on \$26 million in public investment			<u>\$2.48</u>		<u>\$3.62</u>

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- ⁴⁵ PEI 2014: PEI Perspectives Panel Benchmark Study Year 2, Page 14, Table 6
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⁵⁰ Pre-Event Study of PEI Celebrations: Perceptions of PEI Residents, Page 18, Table 4-3;
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⁵¹ Information provided by TIAPEI based on registration information and a summary of
their workshop evaluation forms

⁵² PEI 2014 Student Engagement Final Report to Prince Edward Island 2014 Inc., Pages 4,
5, 8, and 9

⁵³ PEI 2014 Student Engagement Final Report to Prince Edward Island 2014 Inc., Pages 3
and 11

⁵⁴ PEI 2014 Inc. PEI2014.ca Website Report
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⁵⁵ PEI 2014 Inc. Media Report

⁵⁶ PEI 2014 Celebrations: A Profile of New Year's Eve 2014 Opening Celebration
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⁷¹ 2013 and 2014 Estimated Visitation by Month and Origin: Total

⁷² Prince Edward Island Tourism Indicators 2010-2014; September 2015

⁷³ Prince Edward Island Tourism Indicators 2010-2014; September 2015

⁷⁴ Prince Edward Island Tourism Indicators 2010-2014; September 2015; Source: Strait Crossing Bridge Limited. Data is the percentage change of the counts of non-resident vehicles leaving PEI at Confederation Bridge against the same period of last year.

⁷⁵ Prince Edward Island Tourism Indicators 2010-2014; September 2015; Source: Charlottetown Airport Authority. Data is the percentage change of the number of air passengers enplaning and deplaning at the Charlottetown Airport against the same period of last year.

⁷⁶ Prince Edward Island Tourism Indicators 2010-2014; September 2015; Source: Northumberland Ferries Limited. Data is the percentage change of the counts of vehicles leaving PEI via the Wood Island Ferry against the same period of last year.

⁷⁷ Prince Edward Island Tourism Indicators 2010-2014; September 2015; Source: Charlottetown Harbour Authority Inc. Data is the percentage change of the total number of passengers and crew on the cruise ships that visit the Historic Charlottetown Seaport against the same period of last year.

⁷⁸ Prince Edward Island Tourism Indicators 2010-2014; September 2015; Source: Tourism PEI. Motorcoach is the short form of “motorcoach tour”, which is defined as group tours that are transported via large and well-powered bus to their destination, itinerary activities and back. Data is the percentage change of the total number of room-nights sold to motorcoach passengers against the same period of last year.

⁷⁹ Prince Edward Island Tourism Indicators 2010-2014; September 2015; The number of room-nights and site-nights sold (combined) in each month. The number is calculated based on reports submitted by all licensed fixed-roof and campground operations in PEI and includes motorcoach figures.

⁸⁰ 2005 to 2015 Estimated Visitation by Month and Origin: Total
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⁸¹ 2011 to 2015 Estimated Visitation by Month and Origin: Total

⁸² Canada Tourism Snapshot, December 2014, Volume 10, Issue 12
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⁸³ Overall Results of the 2014 PEI Exit Survey, Page 35, Table 5-2; Page 38, Table 5-5

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- 87 Statistics Canada, The Daily, Friday, March 27, 2015, Page 3
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- 88 Centre for Tourism Research, Trends in PEI Tourism Expenditures Estimates (2005 – 2015(F))
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¹⁰¹ The Economic Impact of Tourism Expenditures in Prince Edward Island 2014, Page 17, Table 6

¹⁰² Audited financial statements for the 220 day period ended March 31, 2012 and for the years ended March 31, 2013 to March 31, 2015

¹⁰³ Audited financial statements for the 220 day period ended March 31, 2012 and for the years ended March 31, 2013 to March 31, 2015

¹⁰⁴ Audited financial statements for the 220 day period ended March 31, 2012 and for the years ended March 31, 2013 to March 31, 2015

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- ¹¹⁴ The Economic Impact of Tourism Expenditures in Prince Edward Island 2014, Page 13, Table 4
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APPENDIX 1 – Methodology

Study Context and Mandate

To help determine the overall impact of PEI 2014 programming and investments, a PEI 2014 Research and Evaluation Committee was formed to monitor and guide research activities. The Committee included representatives of PEI 2014 Inc., the PEI Department of Economic Development and Tourism (formerly the Department of Tourism and Culture), the Centre for Tourism Research (CTR) at TIAPEI (formerly the Tourism Research Centre at UPEI) and an independent contractor, MRSB Consulting Services (MRSB). The objectives of the study to analyse and evaluate the PEI 2014 project were:

- To measure the economic impact of the PEI 2014 project to the overall tourism industry
- To measure the socio-cultural impact of the PEI 2014 project
- To measure the long term impact of the PEI 2014 project
- To measure the economic impact of major PEI 2014 celebration programs
- To profile participants of the year-long celebration

MRSB's role was to provide overall project management to the evaluation process, contribute to the design of the evaluation framework, provide advice on the development of evaluation tools, analyse and integrate data from all sources, and prepare a final evaluation report. Other project stakeholders were responsible for conducting the research and reporting on research findings.

Research Methodology

Research Conducted by Centre for Tourism Research

The PEI Department of Economic Development and Tourism conducts a regular program of research to report on annual tourism performance. In 2014, it was supplemented by additional research with attendees of 2014 specific events and final reports submitted by PEI 2014 funding recipients. PEI 2014 related questions were also added to regularly scheduled resident and non-resident and event surveys for two years prior to 2014 and one year after to assist with the evaluation process. The specific data sources are provided in Appendix II. A summary of research follows:

- Pre-and post-PEI 2014 event benchmarking reports prepared by the Centre for Tourism Research at TIAPEI (CTR)

- PEI 2014 event specific research reports prepared by the Centre for Tourism Research at TIAPEI (CTR)
- Annual tourism research (e.g. Volume and Value Reports, Conversion Studies, Exit Surveys) conducted by the Centre for Tourism Research at TIAPEI (CTR)

Event research conducted by CTR aimed to collect information to be used in the overall evaluation of the PEI 2014 celebrations and included:

- Direct spending that resulted from the event
- Attendance at the event with a breakdown by PEI residents and non-residents
- Level of influence of event on non-residents' decision to visit PEI
- Perceptions of economic, socio-cultural and environmental impacts of the event
- Support for the PEI 2014 celebrations
- Customer satisfaction with the event

CTR research was primarily conducted through the use of online surveys with PEI resident and non-resident attendees at the events. Surveys were primarily distributed by email. Individuals hired by CTR explained the research aspect to attendees at events and email addresses were collected. Within days of the event surveys were distributed by email. Two reminder emails were sent to those who had not completed the survey by a certain date. Some surveys were distributed, completed and returned in hard copy and then entered into the database by CTR. The sample sizes for each of the surveys varied depending on the total population but overall the sampling error range was 6 % or less with a confidence level of 95%. MRSB Consulting Services had the opportunity to provide feedback on the various surveys developed during the research phase.

Economic Impact Assessment

Econometric Research Limited was commissioned by Tourism PEI to prepare an independent analysis of the importance and contributions of the tourism sector to PEI's economy in 2014 and to highlight the incremental contributions of the PEI 2014 Celebrations to the tourism base of the Province, focusing particularly on the contributions of the industry to PEI's gross domestic product (GDP), provincial employment, tax base and diversification of the economy. Information from the Centre for Tourism Research at TIAPEI's report, Prince Edward Island 2014 Tourism Expenditures Estimation and 2015 Expenditures Forecast, 2015 was used to calculate the economic contributions.

Econometric Research Limited was also commissioned by Tourism PEI to prepare an independent analysis of the economic contributions of the volumes of

expenditures of PEI 2014 Inc. during the period August, 2011 to March 31, 2015, focusing particularly on the contributions of the organization to PEI's gross domestic product (GDP), provincial employment, and tax base. Expenditure information from the audited financial statements for Prince Edward Island 2014 Inc. for the 220 day period ended March 31, 2012 and for the years ended March 31, 2013, 2014 and 2015 was used to calculate the economic contributions.

Econometric Research Limited uses a unique Demand Economic Impact Model for PEI which they developed for Tourism PEI. The model utilizes a large set of economic and technical databases that are regularly published by Statistics Canada including but not limited to inter-provincial input-output tables, employment by sector, taxes by type of tax and the level of government collecting it, and prices of products. The model has been used in PEI since the 2005 tourism year and is part of a family of models that have been used for tourism economic impact assessments in Alberta, Ontario and Quebec.

Gross Domestic Product (GDP) or value added represents net output generated by the initial expenditures in the province. It is typically the sum of wages, rent, interest and profits in addition to indirect business taxes and depreciation minus subsidies.

Employment refers to the total person years (full-time equivalent jobs) generated by the facility and its sustaining activities.

The impact system generates a large number of taxes (income taxes, HST, liquor and tobacco taxes, etc.) each of which is linked with the level of government receiving it.

Benefits to the economy result through (1) direct increases in business activity in response to the direct expenditures of tourists on such items as accommodation, food, transportation, entertainment and retail; (2) indirectly by the operations of businesses which provide services and products to tourism facilities and establishments that directly sustain these facilities' operations and capacities in order to meet the demands of their visitors; and (3) through the expenditures of the incomes of the employees of the facilities and the businesses affected directly and indirectly by their operations and visitors.

A dollar spent by a tourist in PEI circulates and re-circulates within the economy, multiplying the effects of the original expenditures on overall economic activity, the economic **multiplier effect**.

Direct effects occur from initial expenditures of tourists on such items as accommodation, food, transportation, entertainment and retail. Initial expenditures include the amount of expenditures directly made by both resident

and non-resident tourists. The input data used specifically differentiates between the expenditures of residents, typically assumed to represent a recirculation of money, and those made by non-residents that are typically considered “new money” and therefore incremental to the economy. It is important to note that part of the expenditures of residents could represent import substitution as they could have been spent outside PEI by residents going elsewhere. Direct expenditures only partially capture economic impacts. The economy is a complex whole of interdependent and interacting activities with some significant indirect and induced impacts associated with direct expenditures.

Indirect effects result from the subsequent purchases by suppliers of materials and services to sustain the original and derivative expenditures.

The **induced effects** emerge when the workers in the sectors stimulated by the initial and indirect expenditures spend their additional incomes on consumer goods and services.

Other Research

PEI 2014 Fund Projects

With the assistance of MRSB Consulting Services final activity reports were designed to capture information for evaluative purposes from recipients of small, medium and large sized grants from the PEI 2014 Fund. Information collected from recipients included information on attendance/participation, official language representation, site accessibility, how the project or event increased the appreciation for arts, culture and heritage, lasting benefits, and financial information including leveraging of additional funds.

In addition to the event reports additional research was conducted by CTR for two of the large fund events Rock the Boat MusicFest and Kings Playhouse 2014 Summer Programming. Event research conducted by CTR aimed to collect the same information as in its other event surveys.

Meetings & Conventions

In addition to research conducted by CTR, a final report was also provided by the Meetings & Conventions PEI 2014 Development Manager.

Media

Information on tourism media coverage was compiled by the Department of Tourism using Google Analytics and MediaMiser

Student Engagement

The Lowther Group provided a final report on the student engagement program which included an analysis of the results based on a survey of educators and Google Analytics. The survey design was reviewed by MRSB Consulting Service

APPENDIX 2 – Listing of PEI 2014 Fund Events/Projects

Projects Supported by PEI 2014 Fund Grants

Large Grants (\$25,001 to 200,000)

1. City of Charlottetown - Commemorative Projects Come to Life
2. Charlottetown Area Development Corporation - Historic Hillsborough River Commons
3. Farm Centre Association - Island Agriculture: Honouring the Past, Shaping the Future
4. Women's Network Inc. - A Bold Vision: Women Leaders Imaging Canada's Future
5. Recreation PEI Inc. - Celebrating 150 Years with 150 Community Programs and Celebrations
6. Wyatt Heritage Properties Incorporated - IMAGINE 1864: Summerside Yesterday, Today and Tomorrow
7. PEI Association for Newcomers to Canada - 2014 DiverseCity Festival Island-Wide
8. Town of Montague - Art Works Here: Producing a Public Art Trail On-Site
9. Centre Expo-Festival Center Ltd - Musical Village Programming
10. Prince Edward Island Council of the Arts - PEI 2014 Sesquicentennial Art Commissions and Collection
11. University of PEI - Guardians of Confederation
12. Mi'kmaq Confederacy of PEI - Aboriginal Youth and Confederation - Learning from the Past and Building for the Future
13. Town of Georgetown operating as King's Playhouse - King's Playhouse Expanded Summer Season
14. Fathers of Confederation Buildings Trust - Canada Rocks
15. The College of Piping and Celtic Performing Arts of Canada - Homecoming 2014 Summerside Highland Gathering
16. Charlottetown Area Development Corporation - Great George Heritage Walk
17. Tyne Valley and Area Sports Center - Tyne Valley Oyster Festival Rock the Boat Music Fest
18. The Culinary Institute of Canada, Holland College - Feast of the Fathers Celebration
19. Town of Stratford - Diversity Fountain
20. Fathers of Confederation Buildings Trust - Oh Canada
21. Environmental Coalition of PEI - Confederation Forest Project
22. Prince Edward Island Museum and Heritage Foundation 2014 - Heritage Canada Foundation Annual National Conference: Heritage Revitalization in an Age of Collaboration.
23. Fédération culturelle de l'Île-du-Prince-Édouard - ManiFest Jeunesse
24. This Town is Small - Art in the Open
25. PEI Symphony Orchestra - PEI Symphony Presents 'Celebrate Canada!'
26. Young at Heart Musical Theatre for Seniors Inc. - Dr. Magnificent's Travelling Musical Medicine Show
27. Canadian 4-H Council - National 4-H Citizenship Seminar
28. Black Islanders Cooperative - The Old Stock
29. Societe Saint-Thomas D'Aquin - La Fête nationale des Acadiens et Acadiennes
30. PEI Wildlife Federation (Souris Branch) - Eco -Tours in Eastern Kings
31. Prince Edward Island Harness Racing Association Inc. - O'Brien National Harness Racing Awards

32. Prince Edward Island Museum and Heritage Foundation - Digging into the Past: An Archaeological Discovery in Malpeque Bay
33. Sir Andrew Macphail Homestead Foundation - Remembering The Master's Wife
34. Charlottetown Parade Committee - 2014 Gold Cup Parade
35. Prince Edward Island Museum and Heritage Foundation - Elmira "Don't Ye Know Theatre" Summer Stock Productions
36. PEI Literacy Alliance - Once Upon a Time in Charlottetown: A Foal, Five Kittens, and Confederation
37. Pat and The Elephant - Pat and the Elephant Celebrating PEI2014
38. Wood Islands & Area Development Corporation - Crossing The Strait
39. Regional Cultural/Event Centre Inc., doing business as Harbourfront Theatre - The Ballad of Stompin' Tom
40. Basket Weavers of PEI Cooperative Ltd. - The History and the Skills of the Basket Weavers of PEI
41. Prince Edward Island Harness Racing Association Inc. - Confederation Challenge

Midsize Grants (\$2,015 to \$25,000)

1. PEI Snowmobile Association - PEI 2014 Winter Celebration Snowmobile Ride
2. PEI Jazz and Blues Festival - 2014 TD PEI Jazz & Blues Festival
3. Regional Cultural/Event Centre Inc., doing business as Harbourfront Theatre - The Tale of a Town - PEI
4. The Guild - Island Songs and Stories
5. City of Summerside - The Island Way: 2014 National Storytellers Conteurs du Canada Conference of Canada
6. Friends of Seacow Head Lighthouse Inc. - We'll Leave the Light On - A Community Reunion Celebrating 150 years of Seacow Head Lighthouse
7. PEI Provincial Exhibition Inc. - Old Home Week - Exploring Agriculture & Life on PEI in 1864
8. Souris Harbour Authority - 150 Sailing Challenge
9. Prince Edward Island Agriculture Sector Council - Farming Homegrown Pride - Celebration of the History and Culture of our Farms
10. Town of Stratford - Kaleidoscope 2014 Festival
11. PEI Council of the Arts - 1864: The Cradle
12. Princetown United Church Margate Pastoral Charge - Historical Malpeque (Makpaak) 1864-2014
13. PEI Women's Institute - The Women of Confederation
14. The Guild - 1864: The Tall Hat Chronicles
15. North Cape Coastal Tourism Area Partnership Inc. - Expansion of the Up West Winterfest
16. Friends of the Gatehouse Co-operative Limited - Government House Legacy and Research and Interpretation Project
17. PEI Crafts Council - Canadian Crafts Federation 2014 Conference
18. Eptek Art & Culture Centre/PEI Museum - Eptek Summer Exhibitions
19. La Voix Acadienne - Recueil - Histoire de l'époque!
20. The Village of Abrams Village - Fierté de notre village
21. Artisans on Main - Montague Paint it Beautiful
22. PEI Crafts Council - Frank Ledwell Literacy Legacy Project
23. Community of Afton - Afton: A Celebration of Community and History
24. Indian River Festival Association Inc. - 2014 Choral Celebration
25. Fathers of Confederation Buildings Trust - Banquet
26. Summerside Community Choir - PEI 2014 Tour
27. Le Conseil Rev. S. E Perry Inc. - Festival du bon vieux temps
28. PEI Division, Navy League of Canada - Cadet Ceremonial Review
29. Three Rivers Roma Inc. - Celebrate Three Rivers: Saluting Our Pioneers
30. Point Prim Lighthouse Society Inc. - 1864 Conference
31. PEI Genealogical Society Inc. - Genealogy of the P.E.I. Fathers of Confederation
32. Music PEI - Music PEI Commemorative CD
33. Saint Dunstan's University - SDU Class of '64/PEI 2014/Fr. Allan MacDonald Scholarship
34. West Prince Arts Council - Celebrating the Arts in West Prince
35. Island Trails Inc. - Uncover the Island
36. Kellys Cross Area Improvement Association Inc. - Kellys Cross Family Fun Festival
37. Fathers of Confederation Buildings Trust - Youth Chorus Island Tour
38. Discover Charlottetown Inc. - Farm Day in the City 2014

39. Cardigan Area Heritage Association Inc. - Celebrating Cardigan's Shipbuilding Heritage
40. Canadian Lebanese Association - The Lebanese Community on Prince Edward Island
41. The Crapaud Community Hall - Youth Theatre and Concert Production
42. Prince Edward Island Museum and Heritage Foundation - Maritime Regional Heritage Fair
43. Municipality of Bonshaw - Celebrating the History of Bonshaw, Through Photos, Stories, Walks and Song
44. West Prince Ventures Ltd. - Strength in Youth
45. Boys & Girls Club of Summerside - Happy Birthday Canada
46. Belfast Historical Society Inc. - Lecture Series, History Heritage and Culture
47. Prince Edward Island Co-operative Council - 150 Years in Song
48. Trinity Clifton Pastoral Charge (United Church of Canada) - Trinity Clifton Celebrates 2014
49. Community of Miltonvale Park - Miltonvale Park -2014 Minutes of Stories and Song
50. Voluntary Resource Council - For the Love of Art, Community & PEI
51. Downtown Charlottetown Inc. - John A.'s Tweets
52. Culture PEI - Marketing, Promotion & Audience Development Workshops
53. Canadian Potato Museum - Preserving and Celebrating the History of the PEI Potato Industry
54. Jeunesse Acadienne Ltee - Camp RE-LÈVE
55. Community of Hunter River - History is Art
56. PEI Rural Beautification - Heritage Garden Competition
57. Kensington Art Co-op - Paint the Shed

Small Grants (up to \$2,014)

1. L'Association du Musée acadien de l'Île-du-Prince-Édouard incorporée - Exposition virtuelle "Le Musée acadien fête ses 50 ans : 1964 - 2014"
2. L'Association du Musée acadien de l'Île-du-Prince-Édouard incorporée - Trésors du Musée acadien : 50 ans de bâtir une collection du patrimoine acadien de l'Île
3. Prince Edward Island Museum and Heritage Foundation - Eptek Photos Then and Now
4. Federation culturelle de l'IPE - Festival Hiver Divers
5. PEI Family Violence Prevention Services Inc. - Keep Your Stick on the Ice: Portraits of Girls in Hockey
6. Prince Edward Island Advisory Council on the Status of Women - Women and Song 150: International Women's Day Cabaret
7. West Royalty Elementary Home and School Association - A Day at The Circus: September 1, 1864 Through the Eyes of a Child
8. Green's Shore Quilters Guild - 2014 Green's Shore Quilt Show
9. Ellipses-Artists Collective - Letters from the Manse
10. Irish Literacy Association of Fort Augustus - Irish Literacy Society History
11. Royal Commonwealth Society PEI Branch - Public Lecture
12. Prince Edward Island Museum and Heritage Foundation - Eptek Craft Demonstrations
13. The Marshfield Pioneer Cemetery Trust Fund Committee - The Forgotten Father, Robert Poore Haythorne
14. Prince Street School - Strong Roots, Tall Branches, Bright Futures: Our Tree of Life Mural
15. Resort Municipality of Stanley Bridge, Hope River, Bayview, Cavendish and North Rustico - Heritage Community Day
16. Community of Grand Tracadie - Celebrating Our Community 2014
17. Community of Miltonvale Park - Miltonvale Park - 2014 Canada Day
18. Three Rivers Roma Inc. - 1864 Costumes: A.A. MacDonald Era
19. Town of Cornwall - Canada Day Celebrations 2014
20. Spiritual Assembly of the Baha'is of Charlottetown - Harp in the Hills for Seniors
21. Eastern Kings Community Access Group - A Traditional 1864 Picnic
22. Kelvin Grove Women's Institute Kelvin Grove - Our Community History Through the Architectural Heritage
23. PEI Advisory Council on the Status of Women - Women of Influence Garden Party
24. Town of Borden Carleton - Town Gateway Days
25. Knutsford Women's Institute - Knutsford W.I. 2014 Tea Party
26. Culture PEI - Culture Days Kick-Off
27. Kindred Spirits Quilt Guild - Crazy Quilt Reflections of 1864 in 2014
28. Argyle Shore Women's Institute - Argyle Shore 2014 Celebration Concert
29. Community of Mount Stewart - Heritage River Festival
30. Tyne Valley Friends of the Library - Children's Book: The Village that Loved Oysters A Tad Too Much
31. Prince Edward Island Museum and Heritage Foundation - Beaconsfield Costuming Project
32. St. Augustine's Roman Catholic Parish Inc. - St. Augustine's Celebrates 2014 - 175 Years In Review
33. Ringette Prince Edward Island Inc. - 2014 Atlantic Ringette Championships

34. Prince Edward Island Museum and Heritage Foundation - Heritage Photographic Exhibit Project
35. Friends of Elmira - Strawberry Social 2014
36. The Silver Threads Club - Commemorative Mural
37. Alberton Historical Preservation Foundation Inc. - Historical Vignettes
38. Somerset Festival Committee - Somerset Festival Celebration of Bands - 2014
39. Charlottetown District 4-H - Celebrating 4-H as part of Canada's Heritage
40. Friends of St. Andrews Chapel Ltd. - St. Andrew's Commemorative Lecture
41. Caledonian Club of PEI - Commemorate the 150th Anniversary of the St. Andrews Dinner 2014
42. Kensington Art Co-Op - Artist on the Boardwalk
43. Prince Edward Island Museum and Heritage Foundation - Provincial Heritage Fair & Touring Exhibition
44. Belfast Historical Society - Tartan Day in Belfast
45. Wheatley River 4-H Club - The Wheatley River Picnic
46. West Point Community Enhancement Committee - Pioneer Jacques Pioneer Cemetery
47. Friends of the Farm - Soaring to New Heights
48. Crapaud Exhibition - Crapaud Exhibition Concert
49. Clyde River Women's Institute - Period Garden Party and Heritage Walk
50. Morell Community Municipality - Development of Interpretive Trail
51. Fort Augustus Irish Descendants Association - Fort Augustus Irish Settlers Days
52. École La-Belle-Cloche - De la lecture pour mieux se connaître notre passé
53. PEI 4-H - Local Heritage MEAL - Meet Eat And Learn
54. Prince Edward Island Museum and Heritage Foundation - Eptek Costumes
55. Tryon Peoples' Cemetery Inc. - Tryon Peoples' Cemetery Memorial Celebration
56. Victoria Women's Institute - Legacy Project
57. Albany Lions Club - Albany Historical Project
58. North Shore Community Council - Celebrating the 1864 Conference and Educational Heritage, From the Confederation Era to Modern Times
59. Parkview Senior Citizens Club - Sesquicentennial Historic Picnic
60. Community of Kingston - Kingston Historical Project
61. Winsloe Road Hall - Winsloe Road Heritage Days
62. Prince Edward Island Museum and Heritage Foundation - PEI Potato Pitchin' Championship
63. Alzheimer Society of PEI - Remember Me

APPENDIX 3 – Bibliography

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