
**A SUMMARY PROFILE OF
INTERNATIONAL VISITORS:**

Results for the Main Season: From June 27 to September 30

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SUMMARY PROFILE OF INTERNATIONAL VISITORS: RESULTS FOR THE MAIN SEASON: JUNE 27 – SEPTEMBER 30, 2007

- International visitors (outside Canada and the US) accounted for 4.9 percent of total visitors to Prince Edward Island during the study period in 2007. Approximately 60 percent were from Europe, 10 percent were from Japan and 30 percent were from other offshore countries.
- Almost all Japanese visitors were on pleasure trips (99 percent); this figure dropped to 86 percent for visitors from Europe and to 79 percent for visitors from other International origins.
- Japanese and European visitors were travelling on trips of just over two weeks in length (16 nights). Other International visitors were on month long trips (31 nights).
- PEI was the main destination for 77 percent of the travellers from Japan but they stayed only 4.2 nights (25 percent) on the Island. This was less than European visitors (5.0 nights) and only slightly more than visitors from other International origins (4.0 nights). This odd result for Japanese visitors may be due to trip motivation. Visiting PEI may be the main motivation for the trip, but visiting other destinations was also important.
- International visitors from all markets of origin stayed in hotels, motels, resorts, B&B's or inns much more than Canadian or American visitors; they spent between 42 and 66 percent of their total nights in this type of accommodation. This was up to three times the percentage of nights spent by Canadian and American visitors.
- European visitors spent a leading 36 percent of their nights in Anne's Land and the remainder were distributed throughout the Island in ratios fairly similar to US visitors. These visitors spent at least one night in almost all regions of the Island at above average rates with the exception of Summerside. However, their stays tended to be relatively short.
- Japanese visitors spent a far above average 71 percent of their nights in Charlottetown and the remaining 28 percent in Anne's Land. They did not spend any nights on PEI in other regions. Visitors from other International origins also spent a far above average 44 percent of their nights in Charlottetown; however, they spent a market low 8 percent of their nights in Anne's Land.
- Visitors from Europe took part in every one of the eight leading activities at above average rates but their participation rates fell to well below average for most of second level activities. As expected, Japanese visitors had very high participation rates for Anne of Green Gables related attractions and activities; 85 percent visited Anne attractions. In addition, 66 percent attended live theatre and shopped for souvenirs, while 31 percent visited Canada's birthplace attractions. These were all market highs. Visitors from other international origins were somewhat mixed in the activities participated in. They were market leaders in the top three activities: taking driving tours, going to the beach, and visiting historic and cultural attractions.
- Visitors from all three International markets of origin were very high spenders. Their average daily spending ranged from a low of \$83.41 for European visitors, to \$88.33 for Japanese visitors and on to a high of \$102.36 for visitors from other international origins. In comparison, North American visitors spent an average of approximately \$68 per person per day.
- European and Japanese visitors gave similar ratings for Island prices and value for money and the ratings were very similar to those given by US and Canadian visitors. Visitors from other International origins gave market high ratings for prices and value. European visitors gave

market low ratings for the variety of things to see and do on the Island, and for intention to revisit.

- Almost all Japanese visitors were first-time visitors (99 percent); 77 percent of visitors from Europe and other International origins were first-time visitors.
- The largest number of Japanese visitors were travelling as a group with three or more adults (45 percent). Parties consisting of two adults accounted for a leading 57 percent of visitor parties from Europe and 68 percent of visitors from other International origins. The ratio of family travellers ranged from 15 to 25 percent, which was low relative to Canadian visitors (34 percent) but similar to US visitors (18 percent).
- The age structure of Japanese visitors was very unique relative to other markets: almost one half (49 percent) were 18 to 34 years of age. This was more than double the ratio in this age category for any other market.
- International visitors were very well educated relative to Canadian visitors. This was especially the case with Japanese party heads where 74 percent had University or higher levels of education.
- European visitors have very high household incomes. A market leading 38 percent had incomes of \$125,000 or more. Japanese income levels did not reflect their high levels of education. They were very diverse which may reflect their younger age.

Understanding the Market

- European visitors are very thorough at seeing the Island's highlights but that is where their involvement stops – simply the highlights. Their participation in less popular activities falls to below or even well below average rates. They also do not rate their time on PEI very highly; European visitors gave market low ratings for variety of things to see and do and for intention to revisit.
- Japanese visitors are clearly a distinct market. They are the Island's youngest and most well educated visitors. They travel in groups of adults, and they spend most of their nights in Charlottetown in hotels, motels, inns or B&Bs. However, a significant minority (12 percent) of travel parties camp for an average of 8 nights in Anne's Land. These visitors appear to be here because of Anne and they visit many Anne attractions. They stay an average of about four nights, tour around, possibly relax at the beach, buy souvenirs, and leave happy.
- Visitors from other International origins come from many different countries thus their interests and travel patterns do differ. This is further emphasized by the fact that a surprisingly high 20 percent are travelling mainly to visit friends and relatives and 49 percent of the total nights spent on PEI are spent at the homes of friends and relatives.

Implications for Stakeholders

- The key to visitors from all International origins is they have relatively high incomes, and do not mind spending while they are on vacation. They spend more per person per day than visitors from any other market. The primary problem is there are relatively few International visitors, especially when compared to the Maritime market (50.5 percent of all visitors).
- Growing the International market will be an issue given the diverse countries these visitors are from, and the difficulty and expense in marketing to these visitors.

Results for International Visitors and Other Visitors

The following table provides summary exit survey data for visitors from international including European, Japanese and other countries' visitors.

	European Visitors	Japanese Visitors	Other Countries' Visitors	Canadian & US Visitors
Overall Situation – Total Overnight Visitors	3.0%	0.4%	1.4%	95.2%
Main Purpose of Trip				
<i>Pleasure</i>	86.0%	98.8%	79.3%	78.0%
<i>Visit friends and relatives</i>	12.6%	1.2%	19.9%	20.2%
<i>Other</i>	1.4%	0.0%	0.8%	1.8%
Main Destinations				
<i>PEI</i>	37.5%	76.6%	27.9%	84.2%
<i>Other destination</i>	56.0%	11.0%	71.9%	14.2%
<i>Uncertain/no answer</i>	6.6%	12.4%	0.2%	1.6%
Length of Trip				
<i>Nights on PEI</i>	4.99	4.20	3.98	4.99
<i>Total nights</i>	15.72	16.62	30.46	7.36
Type of Accommodation (by Travel Parties)				
<i>Hotel/motel/resort/B&B/inn</i>	66.1%	72.9%	56.0%	34.1%
<i>Cottage/cabin</i>	12.2%	1.7%	1.3%	20.3%
<i>Campground/trailer park</i>	9.2%	12.1%	7.1%	21.9%
<i>Friends/relatives</i>	5.8%	1.2%	32.6%	22.5%
<i>Other</i>	6.7%	12.1%	3.0%	1.3%
Type of Accommodation (by Trip Nights)				
<i>Hotel/motel/resort/B&B/inn</i>	44.9%	66.2%	42.2%	19.7%
<i>Cottage/cabin</i>	32.9%	2.1%	4.0%	32.2%
<i>Campground/trailer park</i>	7.2%	23.7%	4.1%	21.4%
<i>Friends/relatives</i>	11.9%	2.0%	48.8%	23.9%
<i>Other</i>	3.1%	5.9%	0.9%	2.7%
Length of Stay by Accommodation				
<i>Hotel/motel/resort/B&B/inn</i>	3.41	3.78	2.79	2.87
<i>Cottage/cabin</i>	9.78	5.50	11.35	6.76
<i>Campground/trailer park</i>	4.05	8.00	2.10	5.09
<i>Friends/relatives</i>	7.00	7.00	6.06	4.68
Overnight Stays by Region (by Travel Parties)				
<i>Charlottetown</i>	30.9%	83.1%	32.9%	28.6%
<i>Summerside</i>	3.1%	0.0%	1.5%	10.2%
<i>North Cape Coastal</i>	14.2%	0.0%	27.3%	7.2%
<i>Anne's Land</i>	27.9%	16.0%	14.8%	33.2%
<i>Charlotte's Shore</i>	9.6%	0.0%	10.6%	9.0%
<i>Points East Coastal</i>	14.2%	1.0%	12.8%	11.7%

Overnight Stays by Region (by Trip Nights)				
<i>Charlottetown</i>	23.2%	71.4%	44.0%	20.7%
<i>Summerside</i>	2.0%	0.0%	4.3%	6.6%
<i>North Cape Coastal</i>	11.0%	0.0%	18.9%	8.7%
<i>Anne's Land</i>	35.6%	28.3%	8.2%	37.4%
<i>Charlotte's Shore</i>	18.6%	0.0%	8.3%	11.3%
<i>Points East Coastal</i>	9.6%	0.2%	16.3%	15.4%
Length of Overnight Stay: For Visitors Staying in Region				
<i>Charlottetown</i>	2.64	3.53	4.89	3.11
<i>Summerside</i>	2.27	n/a	10.25	2.75
<i>North Cape Coastal</i>	2.71	n/a	2.56	5.19
<i>Anne's Land</i>	4.46	7.29	2.04	4.81
<i>Charlotte's Shore</i>	6.82	n/a	2.88	5.36
<i>Points East Coastal</i>	2.37	1.00	4.63	5.61
Activities Participated In				
<i>Sightseeing/driving tours</i>	89.9%	83.6%	91.9%	69.7%
<i>Going to the beach</i>	64.8%	54.5%	77.8%	56.4%
<i>Visiting historical/cultural attractions</i>	60.1%	57.4%	67.4%	32.6%
<i>Visiting Anne of Green Gables attractions</i>	44.4%	85.0%	47.6%	22.5%
<i>Shopping for crafts/souvenirs</i>	58.9%	66.3%	43.6%	52.8%
<i>Visiting national/provincial parks</i>	61.4%	35.0%	52.9%	36.7%
<i>Attending lobster dinners</i>	58.6%	53.8%	23.3%	28.2%
<i>Attending live theatre/plays</i>	19.2%	66.4%	20.9%	30.8%
<i>Going to a pubs/bars/nightclubs</i>	23.9%	28.7%	31.4%	15.8%
<i>Visiting Canada's birthplace attractions</i>	24.5%	31.0%	11.5%	11.8%
<i>Visiting friends/relatives</i>	15.3%	1.2%	34.1%	42.0%
<i>Visiting theme/amusement parks</i>	2.3%	15.1%	12.9%	17.9%
<i>Attending fairs/festivals/events</i>	8.8%	18.3%	2.8%	18.3%
<i>Participating in outdoor sports/activities</i>	5.8%	12.4%	4.9%	13.9%
<i>Playing golf</i>	7.5%	2.0%	4.3%	14.8%
<i>Attending sporting events as a spectator</i>	0.1%	0.8%	0.9%	4.7%
Spending				
<i>Average spending per person per night</i>	\$83.41	\$88.33	\$102.36	\$66.11
<i>Total expenditures per trip</i>	\$1,039.01	\$1,059.26	\$1,139.23	\$996.75
Trip Ratings				
<i>Prices of goods and services</i>	3.58	3.58	3.77	3.55
<i>Good value for money</i>	3.93	4.14	4.44	4.21
<i>Variety of things to see and do</i>	3.67	4.16	4.42	4.33
<i>Intention to revisit</i>	3.14	4.36	4.04	4.57
Visitation				
<i>First-time visitors</i>	76.7%	98.8%	76.9%	25.0%
<i>Repeat visitors</i>	23.3%	1.2%	23.1%	75.0%
<i>Return Visitation</i>				
Visited this year or within the past year	36.6%	0.0%	52.4%	60.1%

Two years ago	0.0%	0.0%	29.3%	13.6%
Three years ago	0.3%	0.0%	16.4%	4.6%
Four years ago	6.3%	100%	1.3%	4.2%
Five or more years ago	56.8%	0.0%	0.5%	17.5%
<i>Number of times visited in past 5 years</i>	4.85	2.00	2.80	7.21
Travel Party Composition				
<i>Travelling alone</i>	9.9%	2.5%	2.1%	5.4%
<i>Two adults</i>	57.1%	37.1%	68.1%	49.7%
<i>Three or more adults</i>	15.0%	45.1%	5.1%	12.0%
<i>Families with children</i>	18.0%	15.3%	24.7%	32.3%
Ages of Visitors				
<i>Under 18</i>	16.0%	5.2%	15.9%	20.4%
<i>18 – 34</i>	14.2%	48.9%	12.5%	17.5%
<i>35 – 54</i>	38.3%	29.7%	26.6%	34.0%
<i>55 and over</i>	31.5%	16.2%	45.1%	28.1%
Demographics of Survey Respondent				
<i>Education</i>				
High school or less	5.7%	3.6%	1.1%	13.4%
Some post secondary	1.5%	8.9%	20.2%	12.3%
Community college / technical school	19.8%	12.7%	22.2%	25.6%
University graduate and higher	64.4%	74.0%	51.6%	45.8%
<i>Employment</i>				
Full time	69.8%	69.5%	30.7%	55.6%
Part time or seasonally	4.0%	4.9%	11.3%	9.9%
Retired	23.0%	15.2%	48.0%	23.1%
Other	3.2%	10.4%	10.0%	11.3%
<i>Annual Household income</i>				
Under \$40,000	10.0%	18.3%	4.2%	10.4%
\$40,000 - \$79,999	16.2%	15.9%	14.1%	30.5%
\$80,000 - \$124,999	11.8%	5.5%	29.4%	25.6%
\$125,000 or more	37.7%	18.1%	16.8%	18.3%

Note: This report was written by the Tourism Research Centre (TRC) at the School of Business of the University of PEI. It is one of a series of in depth studies based on comprehensive data previously released in the report “Overall Results of the 2007 Exit Survey.” The data is for the main tourism season of June 27 to September 30, 2007 and is collected as visitors depart PEI at the Confederation Bridge, Charlottetown Airport, and Wood Islands Ferry (seasonally). This data is being collected for a full year and the survey is being managed by the TRC on behalf of Tourism PEI.

The Exit Survey gathers information on main purpose of the trip, length of stay, areas visited, accommodation used, size and composition of travel party, holiday activities, visitor spending, customer satisfaction, visitation data, place of origin, and traveller demographics. The results are based on 3,173 completed surveys collected from June 27 to September 30, 2007.

After careful analysis of the Exit Survey data, the reports will profile different segments of PEI visitors based on origin, travel party type, repeat visitation, and other characteristics. All reports are available on the TRC’s Website at: www.trc.upei.ca/exitsurvey.