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## A PROFILE OF VISITORS FROM THE U.S.:

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

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## TABLE OF CONTENTS

|   |           |
|---|-----------|
| <b>SUMMARY OF REPORT.....</b>   | <b>3</b>  |
| <b>UNDERSTANDING THE MARKET.....</b>  | <b>5</b>  |
| <b>IMPLICATIONS FOR STAKEHOLDERS.....</b>                                       | <b>6</b>  |
| <b>1. U.S. MARKET: OVERALL SITUATION.....</b>                                   | <b>7</b>  |
| <b>2. MAIN PURPOSE OF TRIP .....</b>  | <b>8</b>  |
| <b>3. MAIN DESTINATIONS .....</b>   | <b>8</b>  |
| <b>4. LENGTH OF TRIP AND NIGHTS STAYED.....</b>                                 | <b>8</b>  |
| <b>6. LENGTH OF STAY BY ACCOMMODATION .....</b>                                 | <b>10</b> |
| <b>7. OVERNIGHT STAYS BY REGION .....</b>                                       | <b>11</b> |
| <b>8. LENGTH OF OVERNIGHT STAY BY REGION.....</b>                               | <b>11</b> |
| <b>9. ACTIVITIES PARTICIPATED IN: THE TOP FOUR ACTIVITIES .....</b>             | <b>12</b> |
| <b>10. ACTIVITIES PARTICIPATED IN: THE LEADING SECOND LEVEL ACTIVITIES.....</b> | <b>13</b> |
| <b>11. ACTIVITIES PARTICIPATED IN: LOW LEVEL ACTIVITIES .....</b>               | <b>13</b> |
| <b>12. ACTIVITIES PARTICIPATED IN: LOWEST LEVEL ACTIVITIES.....</b>             | <b>14</b> |
| <b>13. AVERAGE SPENDING .....</b>   | <b>14</b> |
| <b>14. TOTAL EXPENDITURES PER TRIP.....</b>                                     | <b>15</b> |
| <b>15. TRIP RATINGS.....</b>  | <b>15</b> |
| <b>16. FIRST-TIME VISITATION .....</b>  | <b>16</b> |
| <b>17. RETURN VISITATION.....</b>   | <b>16</b> |
| <b>18. NUMBER OF TIMES VISITED IN PAST FIVE YEARS.....</b>                      | <b>17</b> |
| <b>19. COMPOSITIONS OF TRAVEL PARTIES .....</b>                                 | <b>17</b> |
| <b>20. AGE OF VISITORS .....</b>  | <b>18</b> |
| <b>21. EDUCATION.....</b>   | <b>18</b> |
| <b>22. EMPLOYMENT STATUS.....</b>   | <b>19</b> |
| <b>23. HOUSEHOLD INCOME.....</b>  | <b>19</b> |

## Summary of Report

Visitors from the United States accounted for 9.8 percent of Prince Edward Island's total visitors, 11.3 percent of total direct expenditures, and 12.4 percent of total nights stayed on PEI during the study period in 2007. The Island's US visitors divided almost evenly between those who live in the New England States (5 percent of total visitors) and those who live in states outside the New England region (4.8 percent).

Visitors from New England and from states outside New England were similar in that approximately 85 percent of visitors from both regions were visiting the Island on pleasure trips, and about 12 percent were visiting friends or relatives. This latter result was the lowest for the various origin markets considered. Other than this, the two travel groups are very different. Both groups of US visitors emerged as distinct visitor segments with many unique characteristics.

When compared to visitors from outside the Maritimes, New England visitors were travelling on relatively short trips that averaged 9.5 nights away from home. However, PEI was the main destination for 85 percent of these visitors. In addition, visitors from New England spent an average of 7.4 nights on PEI, which was equivalent to 78 percent of their total trip away from home.

US visitors from states outside New England were travelling on longer trips; they averaged 13.1 nights away from home. Prince Edward Island was the main destination for only 59 percent of these trips and their stays on PEI were relatively short, averaging only 5.2 nights. This was equivalent to 40 percent of their total trip time.

New England visitors were unique in that they spent more than one half (54 percent) of their total trip nights on the Island in cottages. This was easily the highest of all the origin markets considered. With so many of their nights spent in cottages, they spent a market low of only 16 percent of their nights in hotels, motels, resorts, B&Bs, or inns.

US visitors from outside New England were the opposite. They spent 32 percent of their trip nights in hotel, motel, or resort accommodations. This was second only to International visitors. Only 28 percent of their nights were spent in cottages. In addition, US visitors from outside New England enjoy camping; 22 percent of their nights were in campgrounds, second only to Maritime visitors.

The differences between these US segments extended to where they spent their time on the Island. Visitors from both US regions spent approximately the same share of their nights in Anne's Land (New England 34 percent of nights, distant states 37 percent). However, only 28 percent of travel parties from New England spent a night in Charlottetown, the lowest level recorded by all visitors when analyzed by place of origin.

As a result, New England visitors spent a market low of only 18 percent of their nights in Charlottetown while US visitors from outside New England spent 27 percent of their nights in Charlottetown, second only to International visitors. Visitors from New England also spent a much higher percentage of their nights in the Points East and North Cape areas. In both cases, visitors from New England recorded the highest percentage of nights spent in these two non-central areas.

In addition, if New England visitors stayed overnight in a destination region they tended to stay for a longer than average time. These visitors recorded the longest average length of stay for all

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six regions on PEI. US visitors from outside New England were the opposite. They had the shortest average length of stay in five of the six destination regions.

Taking sightseeing or driving tours was the leading activity for visitors from both US markets and they shared a common below average interest in shopping for crafts or souvenirs. Outside these two activities the two groups separated again in terms of their interests and participation rates. US visitors from outside New England were very thorough sightseers. They visited all types of attractions and did the “touristy” things at above average rates.

Some notably high participation rates included visiting Anne of Green Gables attractions (49 percent visited, the highest among all visitors), attending lobster dinners (46 percent), and visiting historic and cultural attractions (55 percent). However, these visitors’ participation rates for golf, other outdoor activities, and even going to the beach tended to run below the norms for visitors from most other markets.

Vacationers from New England visited National or Provincial Parks and historic and cultural attractions at above average rates but their interest in any other types of attractions and especially those that could be considered “touristy” fell to well below average rates. A notable exception was attending live theatre and plays; 43 percent attended – the highest of all visitor markets. New England visitors visited Anne of Green Gables attractions at below average rates (30 percent). In comparison to visitors from more distant US states, New Englanders were much more active. They played golf, participated in outdoor activities and even attended fairs and festivals at market leading ratios.

Visitors from New England were the Island’s lowest spending visitors on a per person per day basis. They spent an average of only \$53.05 per person per day. This was likely due to the very high percent of nights stayed at cottages and the low percent of nights stayed at hotels, motels, and resorts. At the opposite extreme, visitors from more distant US States were the Island’s highest spending visitors on a per person per day basis. At an average of \$92.35 per person per day, these visitors spent 74 percent more than those from New England. However, since New England visitors stayed for a longer period of time on PEI, total trip expenditures ended up being almost identical to visitors from other US states. Visitors from New England spent a total of \$1,196 per party per trip, while US visitors from outside New England spent \$1,210 per party per trip.

At least some of the differences in the travel patterns between New England visitors and those who came from outside New England can be explained by differences in the characteristics of the people themselves. US visitors from both market areas shared the characteristics of being very well educated (68 percent had university or higher levels of education) and having high household incomes. Beyond these aspects they differed in a number of key areas.

The demographics and characteristics of New England visitors tended to resemble those of Canadian visitors from outside the Maritimes. More than one half (57 percent) were making a return visit to the Island. One quarter (25 percent) were travelling as families accompanied by children and less than one third (31 percent) were retired.

Visitors from outside New England were considerably older (66 percent were 55 or more years of age), almost one half (49 percent) were retired, a market low of 11 percent were travelling as families with children, and only 25 percent had been to the Island before.

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US visitors from New England and from states outside New England differed in many respects in terms of who they were and what they did while visiting the Island. Despite these differences they gave the Island almost identical trip ratings in all categories. Both groups gave the Island its lowest ratings for the prices of goods and services. The ratings were identical (3.3) and they were the lowest given by any of the Island's visitor markets.

## **Understanding the Market**

Visitors from all US markets have three characteristics in common: they are very well educated, they have a great deal of money, and more than visitors from any other origin market they believe prices on the Island are on the edge of being somewhat high.

While it may appear somewhat illogical that the Island's wealthiest visitors are also its most price sensitive, it is important to recognize that many American visitors come from areas where prices for many goods, especially accommodations and food and beverage, are lower than in Canada. As well, the Canadian dollar has been steadily increasing against the American dollar, effectively pushing the prices of all Canadian purchased goods and services upwards. Other than these points in common, US visitors from New England and from states outside New England are very different.

More than one half of New England visitors have been to the Island before. Almost one third could be classified as "regular customers" - they were also here in 2006. Possibly because so many are returning they appear to have developed their own "take" on the Island and they seem very comfortable pursuing what they find of personal interest. Many will rent a cottage where they will stay for two weeks, an above average number will golf, many will forego Charlottetown in order to spend more time at the Island's Eastern and Western ends and, while they are not a good source of visitors for Anne attractions (or many things considered "touristy"), they are the Island's best customers for plays and live theatre.

US visitors from outside New England are older, wealthier, and like to tour. Since most have come a long way and this is their visit to PEI, they see the Island thoroughly. Taking sightseeing or driving tours is their leading activity and while touring they visit National and Provincial parks as well as historic, cultural, and Anne of Green Gables attractions. Attending live theatre and lobster dinners are also popular with these visitors. They visit many attractions while on PEI.

These are good visitors because they want to visit many areas and attractions; however, they are "seers" and not "doers." Activities, including those on the Island, appear to have limited appeal to them. In addition, they are on multi-province touring trips (PEI is not the main or only destination). Typically such trips are relatively unstructured and fairly flexible. This offers some degree of potential (offer them more to see and there is a good chance they will have the flexibility to stay longer).

The downside is, disappoint them and they will use the same flexibility to move on to another destination or Province. This is further reinforced when it is considered that only 26 percent of these visitors visit family or friends while on PEI, the lowest level of any of the origin markets.

## Implications for Stakeholders

### 1. New England Touring Visitors

It is positive that Prince Edward Island is the main destination for 85 percent of its New England visitors but it raises the question “where is the New England touring market?” During the study period in 2007 New England visitation to Atlantic Canada was expected to be in the range of 80,000 to 90,000 overnight travel parties.<sup>1</sup> Unless there has been a very significant and recent change in travel patterns the large majority of these trips were touring vacation trips.

The exit survey shows that approximately 11,100 New England travel parties visited PEI during the study period (about 13 percent of total New England visitors to Atlantic Canada). Since 85 percent of these trips were destination trips to PEI, this implies that only about 1,700 trips (party visits) were New England visitors who were touring the Maritimes. The Maritime touring market has a maximum potential of about 70,000 travel parties. If only 1,700 of these parties are visiting PEI, the Island’s capture rate appears very low. On the positive side, it seems that many of the New England visitors to PEI have a tie to PEI: either friends and/or family or perhaps a second home. This is a positive as these visitors are likely committed to visiting PEI regardless of the level of the Canadian dollar or the price of fuel.

### 2. US Seniors Market

Visitors to PEI from states outside New England are a good market and in many respects they are the expected market: well-educated with high incomes, dominated by older (senior) travellers, and heavily skewed toward the retired segment. Unfortunately, they are the “tourers and sightseers,” the activities are missing. They have the look of the “old seniors” market...the market as it was ten years ago. Missing are the “new seniors,” who have also been termed the “active 60s;” those travellers who are 60 plus, but who think and act like they are 50. This is where the numbers, spending, travel time, and market growth are and will be in the future. This is the market with great potential for all destinations.

### 3. US Young Adults

Atlantic Canada has never been particularly strong as a destination for young US adults, but the ratios found in this study are almost shocking. Only 4 percent of US visitors to PEI from outside New England were 18 to 34 years of age. At the opposite extreme, 66 percent were 55 or older.

Many studies have suggested that Canada’s image does not lend itself to the under 35 travel group. It has been suggested that Canada struggles in this market due to the lack of an “upbeat, excitement factor” that appeals to Americans under 35. But, 4 percent versus 66 percent goes beyond struggling. This result implies that either young America perceives that PEI is a destination for senior citizens, or that this specific target market has not been the focus of the marketing campaigns developed for the US market.

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<sup>1</sup> This is based on data obtained from International Travel Survey (ITS) 2006 (Statistics Canada) and International Travel, Advance Information, December 2007 (Statistics Canada: 66.001-P)

## Methodology

Data presented in this report was gathered via the PEI Visitor Exit Survey. In the fall of 2006, the Tourism Research Centre (TRC) re-designed the exit survey and methodology to be used to implement the 2007 exit survey. The new survey began testing in May 2007 and was fully implemented in mid-June 2007. The new exit survey will collect data over a 12-month period, which is a significant change when compared to previous exit surveys. Prior to 2007, the exit survey was only administered in the June to September time period. The new methodology represents a significant shift in how the tourism industry collects information on visitors to PEI.

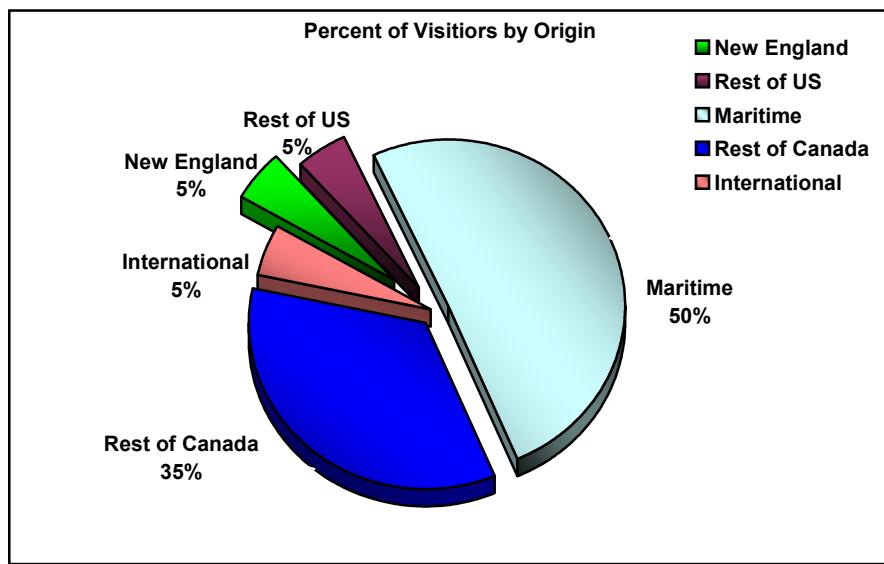
The 2007 exit survey with a new methodology has the potential to shape industry and government policy and marketing for travel and tourism in Prince Edward Island, but also to better understand visitors' behaviours and the impact of tourism on our community. Thus, the study will provide resources and insight information for better understandings of travellers and enable an invaluable contribution to tourism research while focusing on the major objectives of the study.

The survey questionnaire was significantly modified to collect relevant information for use by the industry and government. A copy of the new questionnaire is available on the TRC Website (<http://www.trc.upei.ca/exitssurvey>). In summary, questions were added, omitted, and re-structured for a cleaner survey that is easier to complete and takes the respondent less time to complete.

The results presented in this report are for pleasure visitors that spent at least one night on PEI. Separate surveys of business, motor coach, and cruise ship visitors are also being completed by the TRC. The results for these types of visitors are not included in the results presented in this report. For more information on the Exit Survey methodology, please see the TRC's report titled "Overall Results of the 2007 Prince Edward Island Exit Survey: Results from the Main Season: From June 27 to September 30."

## 1. U.S. Market: Overall Situation

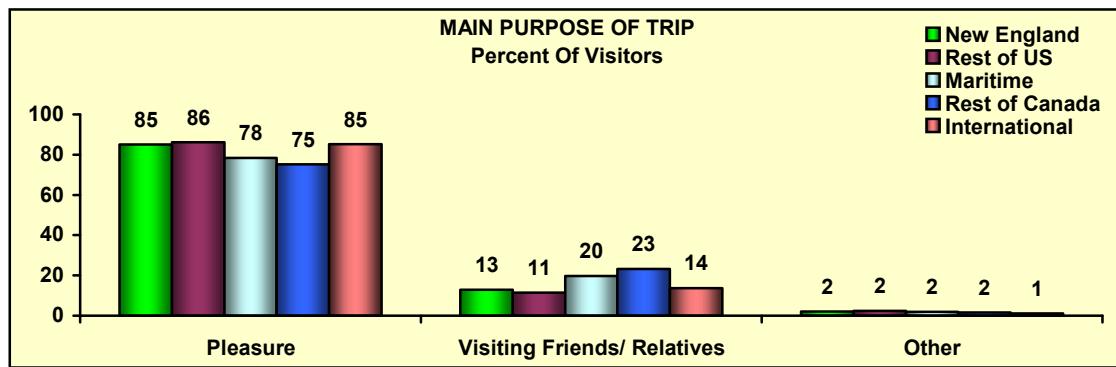
Visitors from the US accounted for 9.8 percent of total visitors to Prince Edward Island during the study period in 2007. This was equivalent to 21,879 travel parties. US visitors divided almost equally between New England (5 percent) and all other US States (4.8 percent). The US is the Island's fourth largest market of origin after the Maritimes, Ontario, and Quebec. The number of visitors from Quebec is significantly larger than the number from the US (13.5 percent versus 9.8 percent).



## 2. Main Purpose of Trip

A vast majority of US visitors travelled to the Island on pleasure trips. An almost identical 85 percent of New England visitors and 86 percent of visitors from the rest of the US were travelling for the main purpose of pleasure.

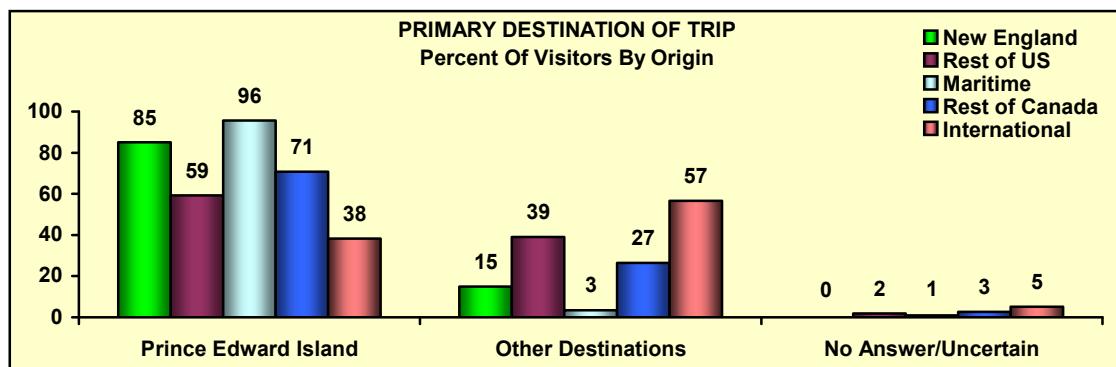
Only 13 percent of New England visitors and 11 percent of visitors from other States visited the Island mainly to visit friends or relatives. The visiting friends and relatives component was considerably below the ratio for both Maritime visitors (20 percent) and visitors from the rest of Canada (23 percent).



## 3. Main Destinations

Prince Edward Island was the main destination for 85 percent of New England trips but it was the main destination for only 59 percent of the trips taken by visitors from the rest of the US.

The result for the New England market was far higher than the results for visitors from any of the origin markets other than the Maritimes. In contrast, the destination ratio for visitors from other US States was lower than any market except International.

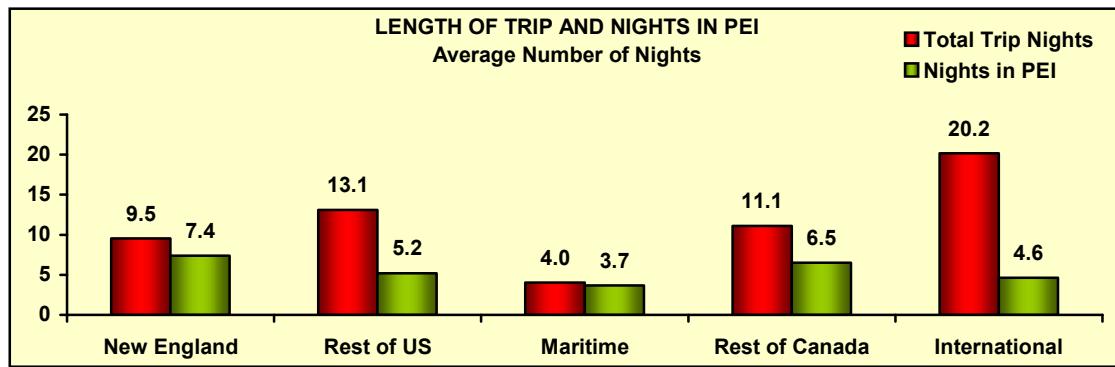


## 4. Length of Trip and Nights Stayed

When compared to visitors from outside the Maritimes, New England visitors were travelling on relatively short trips that averaged 9.5 nights away from home. However, PEI was the main destination for 85 percent of these visitors. In addition, 7.4 nights (or 78 percent of their total trip nights), were spent

on PEI. New England visitors had the longest average length of stay on the Island and allocated PEI the highest percent of trip nights when compared to all other non-Maritime markets.

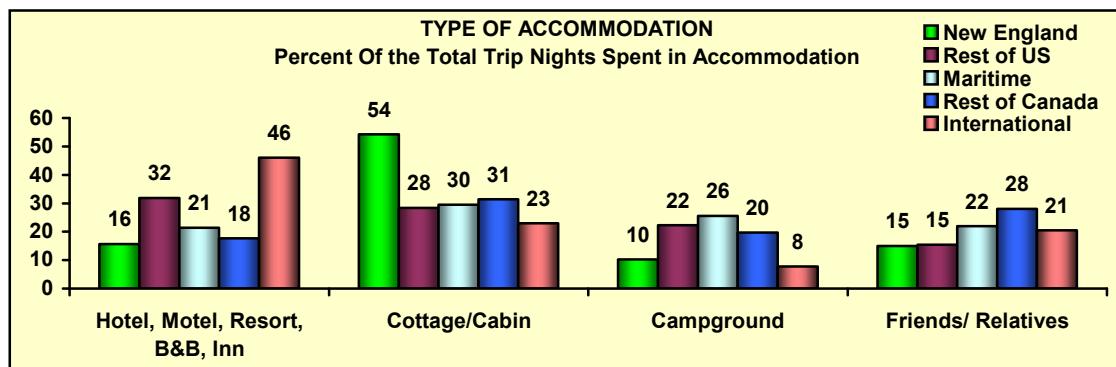
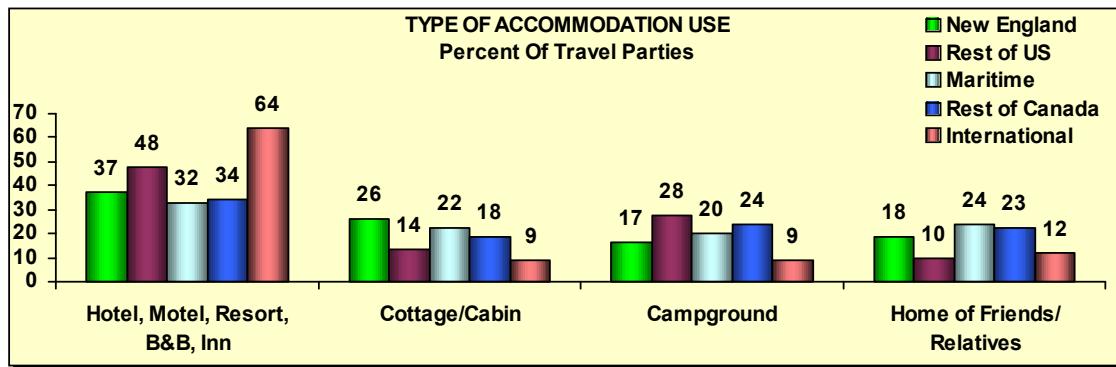
Visitors from other areas of the US other than New England were on longer trips that averaged 13.1 nights away from home. This was the second longest of any of the origin markets. However, these visitors spent only 5.2 nights (40 percent) of their total trip nights on PEI.



## 5. Type of Accommodation Used

Type of accommodation has been broken up into two tables: one depicting the percent of travel parties staying at least one night at the various types of accommodation, the other showing the percent of total trip nights spent at each accommodation type. US visitors' choices of accommodation are dramatically different depending on origin. New England visitors were more likely to stay in cottages than visitors from any other market area. A leading 26 percent of visitors from New England stayed in cottages for at least one night. Of the total nights spent on PEI, New England visitors spent 54 percent of them in cottages. This latter figure was far above the rate for any other market. Canadian visitors from outside the Maritimes ranked a distant second with only 31 percent trip nights spent in cottages.

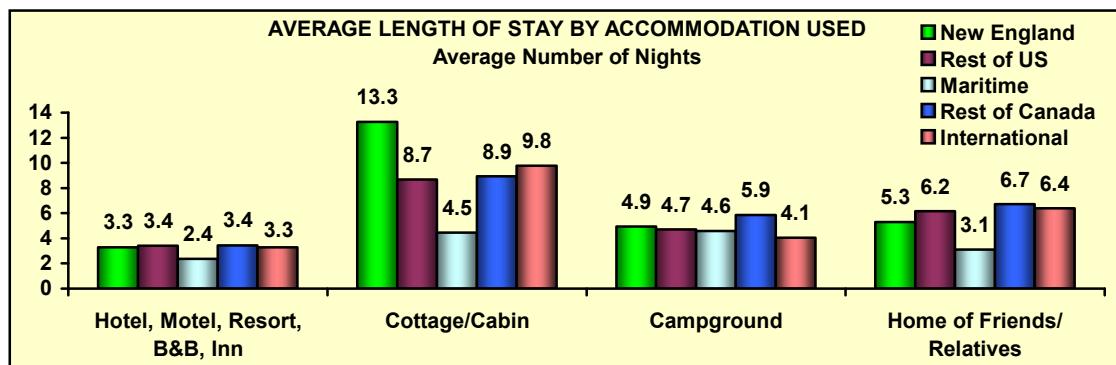
US visitors from outside New England spent only 28 percent of their nights in cottages, which was very much in line with overall averages. However, at 32 percent of total nights, they led all markets except International visitors in terms of nights spent in hotels, motels, inns or B&Bs. Since hotels, motels, and resorts are the "money sector" of the accommodation industry, this is a very positive result. In contrast, New England visitors spent a very low 16 percent of their total nights in hotel, motel, and resort accommodation. This is surprising given that 37 percent of the travel parties from New England spent at least one night in these types of accommodations, which was in line with Canadian visitors. In addition, 28 percent of US visitors from outside New England spent at least one night at campgrounds, the highest rate recorded for any origin. Campgrounds accounted for 22 percent of all nights spent on PEI, the second highest after the Maritime market. This difference in accommodation choice for these two categories of US visitors is pronounced.



## 6. Length of Stay by Accommodation

The average length of stay in hotel, motel, resort, B&B and inn accommodation for both New England visitors and for US visitors from outside New England was almost identical to the average length of stay for visitors who used this type of accommodation from all markets outside the Maritimes (average 3.3 to 3.4 nights).

The length of stay for New England cottage users was a remarkably long 13.3 nights. A high percentage of US visitors from outside New England stayed in campgrounds yet their average length of stay was on par with campers from other markets (average 4.7 nights).

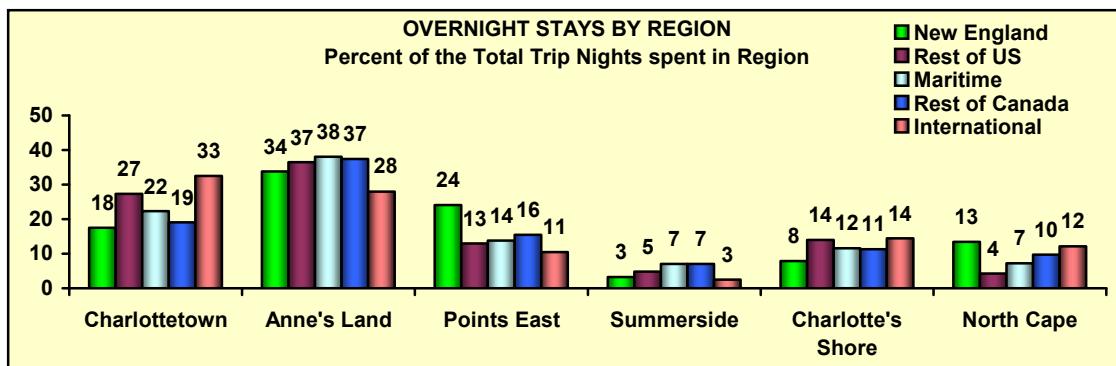
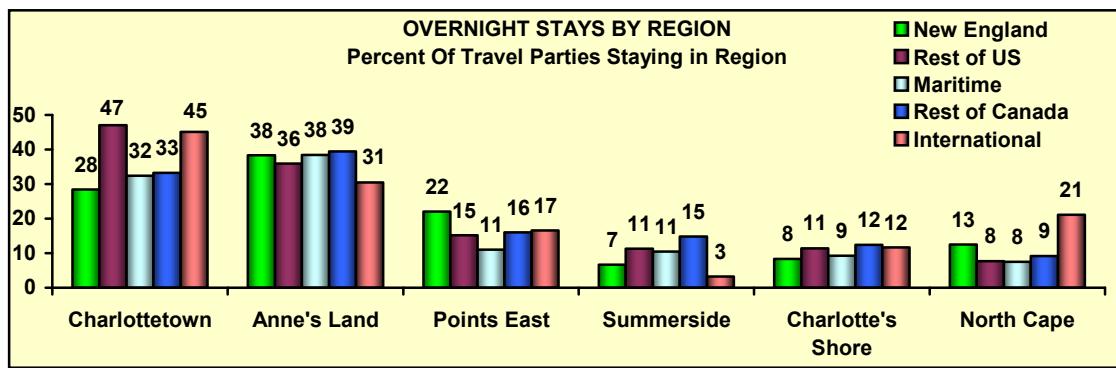


## 7. Overnight Stays by Region

This information is presented in two ways. The first Figure provides the percent of travel parties, from the five origins, that spent at least one night in one of the six travel regions. The second Figure provides the percentage of the total trip nights spent in one of the six travel regions by visitor origin.

The leading Island destination for New England visitors was Anne's Land with 38 percent of visitors spending at least one night in the area. Overall, these visitors spent 34 percent of their trip nights in this region. Points East ranked a surprising strong second accounting for 22 percent of travel parties spending at least one night, and 24 percent of nights. Charlottetown ranked third accounting for only 18 percent of total trip nights. Note, however, that 28 percent of New England visitors spent at least one night in Charlottetown. Obviously, New England visitors spent very short period of time in Charlottetown. New England was the only market that did not rank Charlottetown first or second in terms of percentage of nights spent on PEI.

At 36 percent of visitors spending at least one night in the area and 37 percent of total nights, Anne's Land was also the leading destination for nights spent by US visitors from outside New England. Also, in direct contrast to the New England market, Charlottetown ranked a very strong second. A leading 47 percent of visitors from distant US states spent at least one night in Charlottetown, accounting for an above average 27 percent of their total trip nights in the city. The remaining nights of US visitors from outside New England were distributed across PEI at rates similar to visitors from Canadian markets.

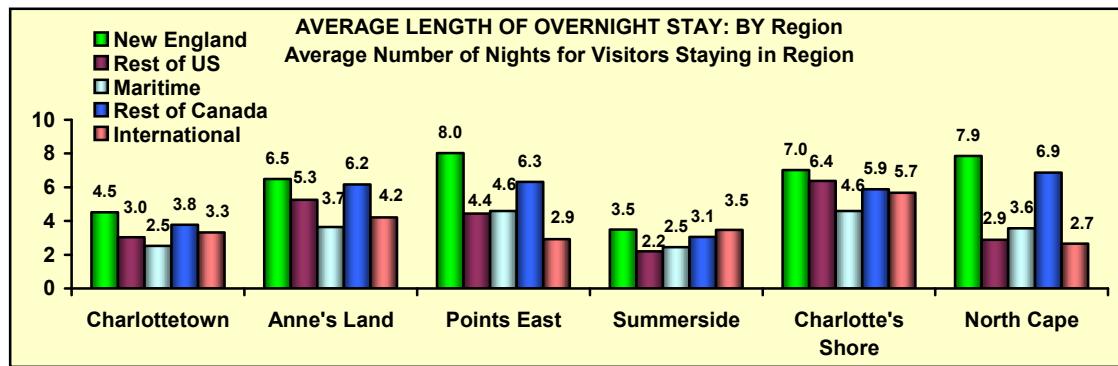


## 8. Length of Overnight Stay by Region

This Figure provides the average number of nights spent in the region by those visitors who stayed at least one night in the area. This length of stay data is provided by visitor origin. If New England visitors

stayed overnight in a region they tended to stay a very long time. This was true for all destination regions. New England visitors had the highest average length of stay in all six regions for those who had spent at least one night in the region. Their average length of stay was especially long (averaging 7 to 8 nights) in the three less travelled regions of Points East, North Cape and Charlotte's Shore.

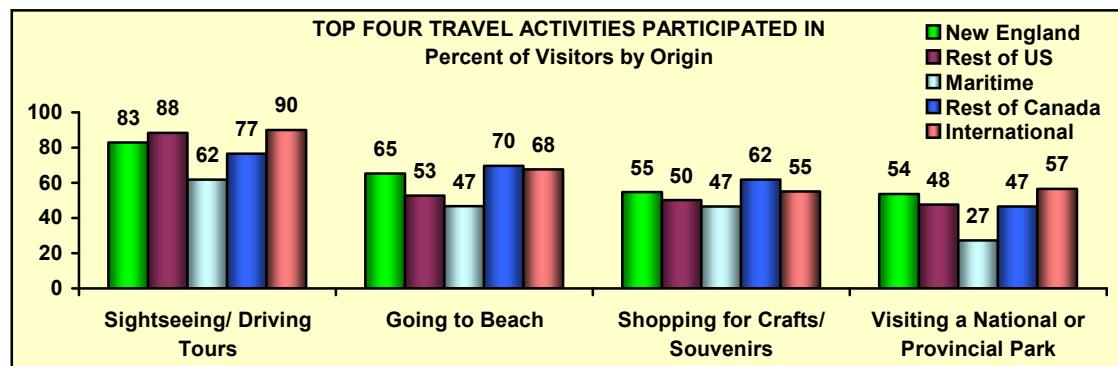
US visitors from outside New England were almost the opposite. With the exception of Charlotte's Shore, where they spent an above average 6.4 nights, these visitors tended to stay shorter periods of time in all destinations. Their average lengths of stay were below average in five of the six destination regions. This is due to the fact that these visitors spent a relatively low portion of their trip on PEI.



## 9. Activities Participated In: The Top Four Activities

The patterns of activity participation tended to be similar for visitors from New England and for US visitors from more distant states although the actual ratios of participation differed. US visitors tended to be more interested in sightseeing/touring and visiting locations such as National and Provincial Parks and much less interested in going to the beach or shopping than non-Maritime Canadian visitors.

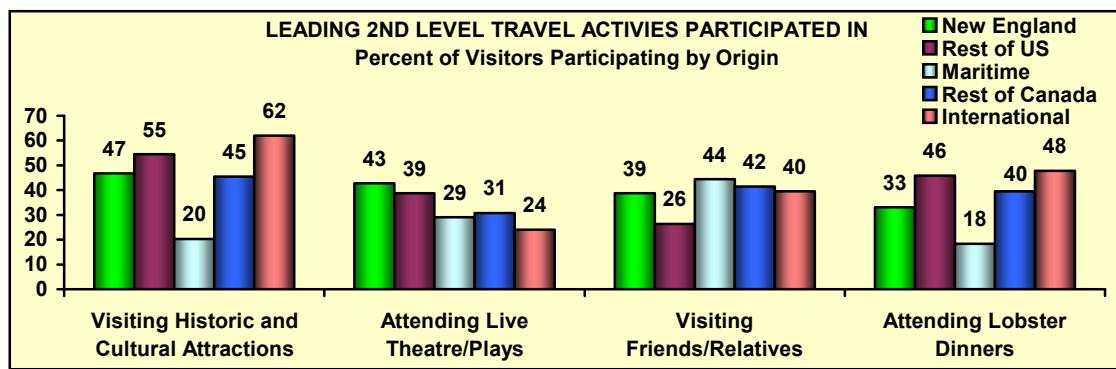
At 83 percent, touring/sightseeing was easily the leading activity participated in by New England visitors and especially by US visitors from outside New England where 88 percent indicated that they toured the Island. This was the second highest level recorded. Going to the beach ranked a distant second for visitors from both areas (65 percent of New England visitors and only 53 percent of visitors from more distant states went to the beach).



## 10. Activities Participated In: The Leading Second Level Activities

US visitors from outside New England toured the Island extensively and they visited or took part in tourist oriented attractions and activities at ratios that were above the norm for visitors from other markets. More than half (55 percent) visited historic and cultural attractions, 46 percent attended lobster dinners and 39 percent attended live theatre or plays. These visitors were much less likely to visit friends or relatives, only 26 percent recorded doing so. This was the lowest level recorded, by far, for visitors from any market.

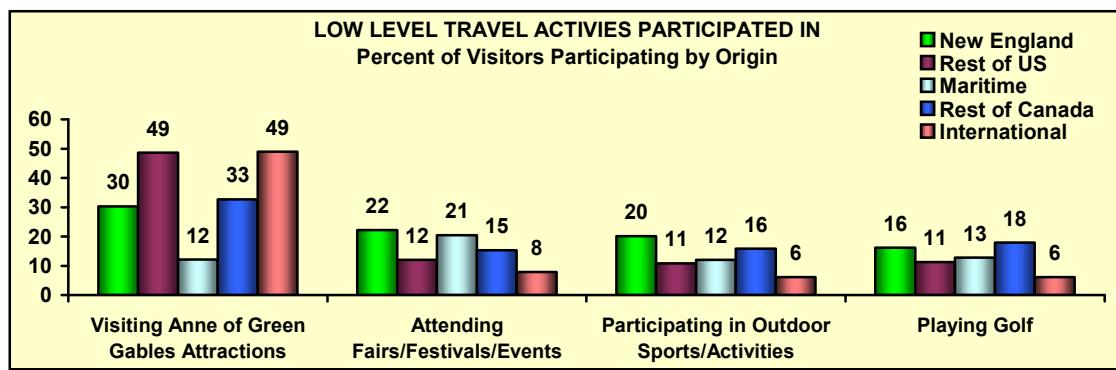
New England visitors tended to visit historic and cultural attractions or attend lobster dinners at lower rates than their counterparts from other areas in the US. Their participation rates in these activities were more in line with Canadian averages. However, at 43 percent, New England visitors attended theatre or plays at a higher ratio than visitors from any other market of origin.



## 11. Activities Participated In: Low Level Activities

US visitors from outside New England visit tourist attractions on the Island at above average rates and this includes Anne of Green Gables attractions. At 49 percent, their visitation rates for Anne attractions equalled that of International visitors. This did not hold true for visitors from New England; only 30 percent visited Anne attractions, a rate very similar to the Canadian average.

New England visitors tended to be much more active. Fairs and festivals were attended by 22 percent of New England visitors (only 12 percent of other US visitors attended), 20 percent participated in outdoor sports or activities (only 11 percent of other US visitors participated) and 16 percent played golf as compared to only 11 percent of US visitors from outside New England.

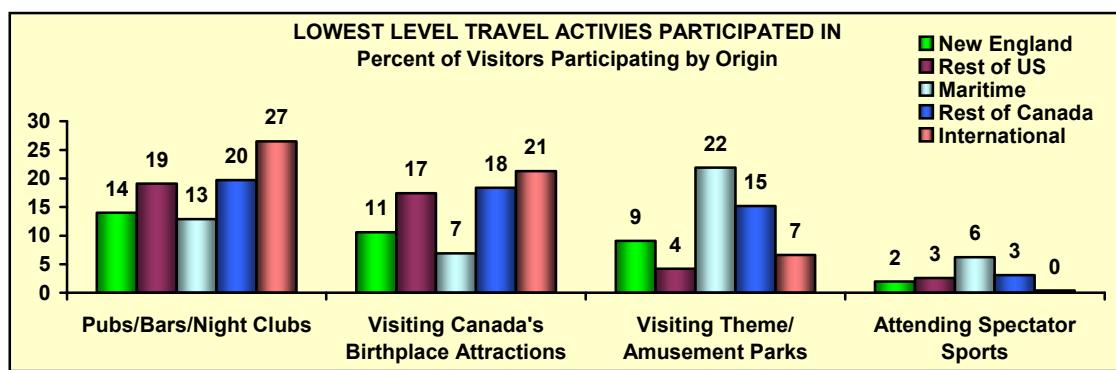


## 12. Activities Participated In: Lowest Level Activities

A very low ratio of New England visitors went to bars or pubs (14 percent). Only 11 percent of New England visitors visited Canada's birthplace attractions, 9 percent visited theme parks and only 2 percent attended spectator sports.

US visitors from outside New England visited bars and pubs at a higher ratio (19 percent) and they visited Canada's birthplace attractions at a much higher ratio (17 percent). Both ratios were much closer to the ratio for Canadian visitors from outside the Maritimes rather than the ratios for New England visitors.

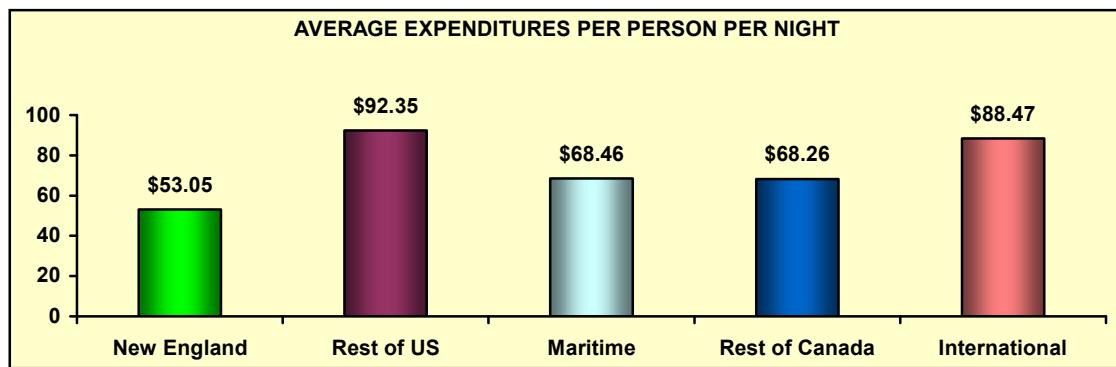
Visits to theme and amusement parks were very low for visitors from all US markets.



## 13. Average Spending

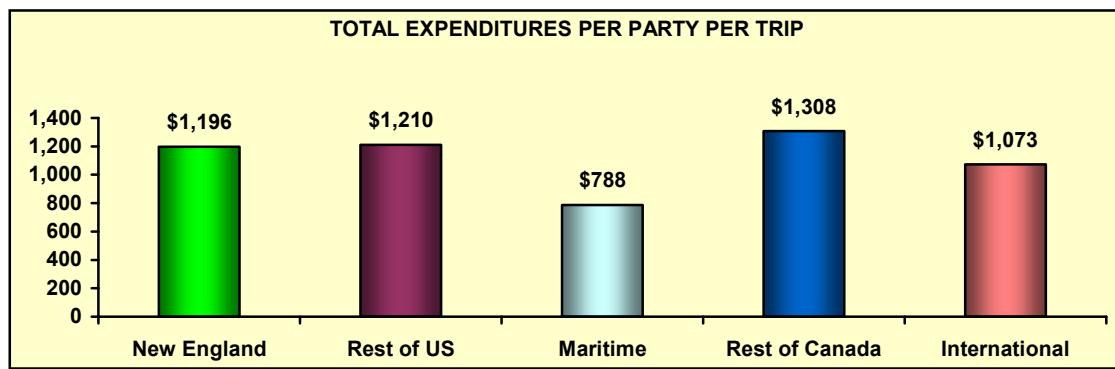
New England visitors spent on average only \$53.05 per person per night. This was the lowest average expenditure for visitors from any origin market. This low expenditure may have been influenced by the fact that more than one in four (26 percent) stayed in cottages, stayed almost two weeks (13.3 nights) on average, accounting for 54 percent of their total nights on PEI. The average nightly rate for such long stays would be relatively low on a per person basis. Also contributing to this result is the low number of nights New England visitors spent in hotels, motels, and resorts, and the fact that many in this group appear to be seers and not doers.

At the opposite extreme, US visitors from outside New England were the Island's highest spending visitors on an average per person per night basis. They spent an average \$92.35 per person per night, which was 74 percent more than the New England average and 35 percent more than the average for Canadian visitors from outside the Maritimes who spent an average \$68.26 per person per night. This is likely due to the high percentage of nights spent in hotels, motels, and resorts.



## 14. Total Expenditures per Trip

Although the average daily expenditures of New England visitors were low, their stays on the Island were long (average 7.4 nights). This led to a balancing out of total trip expenditures. New England visitors spent an average \$1,196 per party per trip, which was within 12 percent of the average \$1,210 spent per trip by US visitors from outside the New England region. Average trip expenditures for US visitors overall tended to be approximately 7 percent less than the average \$1,308 spent per trip by Canadian visitors from outside the Maritimes.

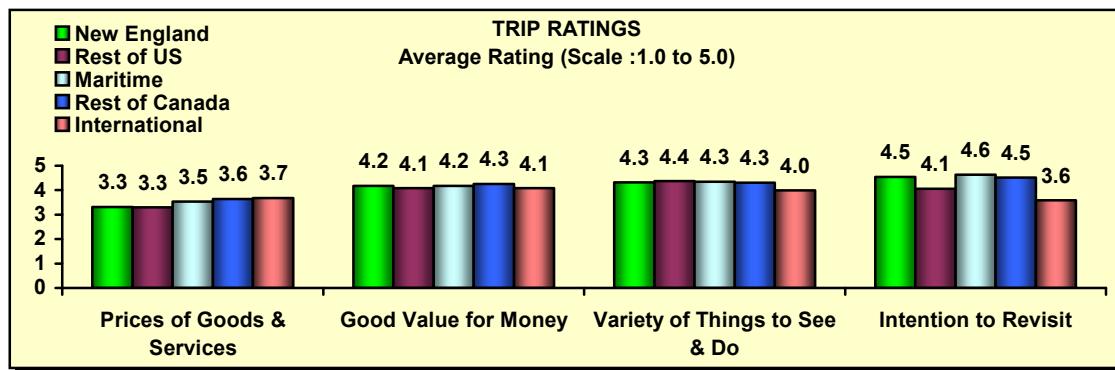


## 15. Trip Ratings

With the exception of “intention to revisit”, trip ratings between New England visitors and US visitors from outside New England tended to be almost identical.

Not surprisingly, visitors from distant US states view the Island as a long trip with the probability of revisiting relatively low (rating 4.1). New England visitors are much closer which makes PEI much more accessible (average rating 4.5).

US visitors from both markets gave the Island its lowest ratings for the prices of goods and services. These ratings were below the ratings given in this category by visitors from all other markets (average 3.3 versus 3.6 for visitors from non Maritime Canadian markets and 3.7 for International visitors).

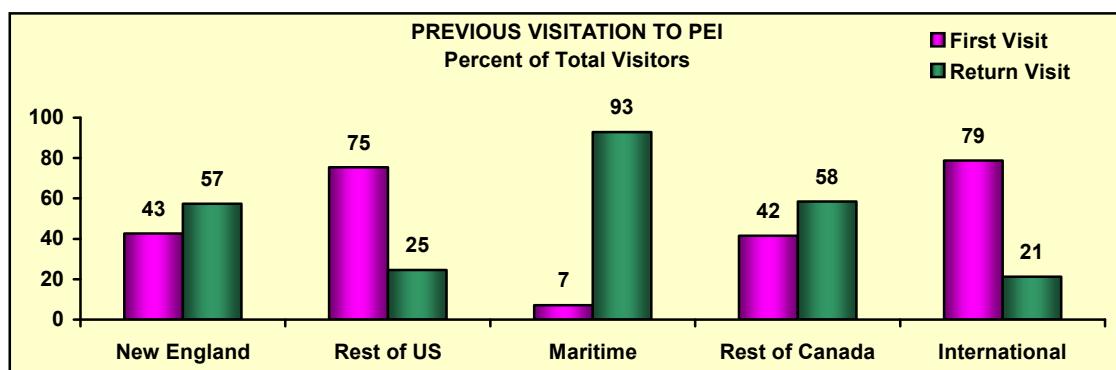


## VISITOR CHARACTERISTICS

### 16. First-Time Visitation

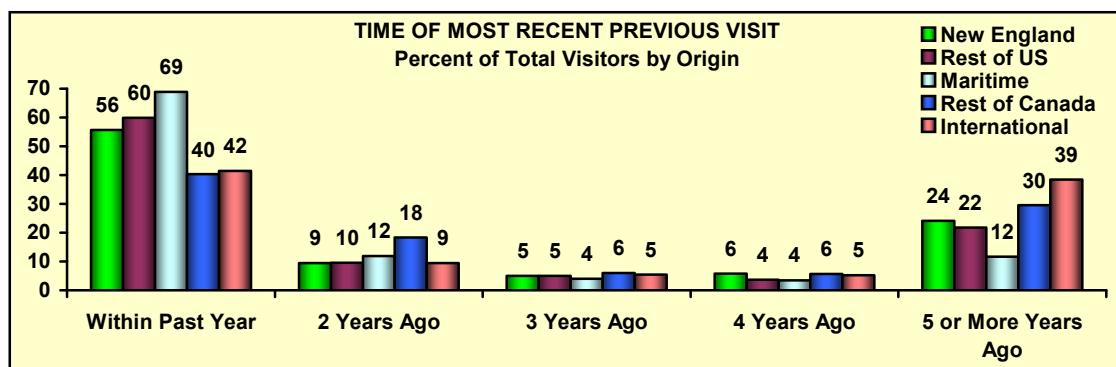
Well over one half (57 percent) of New England visitors were making a return visit to the Island. This was much higher than the ratio for US visitors from more distant states. Only 25 percent of visitors from States outside New England had been to PEI before. The 75 percent first-time visitation ratio for US visitors from outside New England was much higher than the Canadian ratio (42 percent first time visitors).

The New England ratio for first-time visitation (43 percent) was almost identical to the first-time visitor ratio for Canadian visitors from outside the Maritimes (42 percent). The very high level of first-time visitors from non-New England states explains the high rates of visits to historic, cultural and Anne of Green Gables attractions, and also the high attendance for lobster dinners.



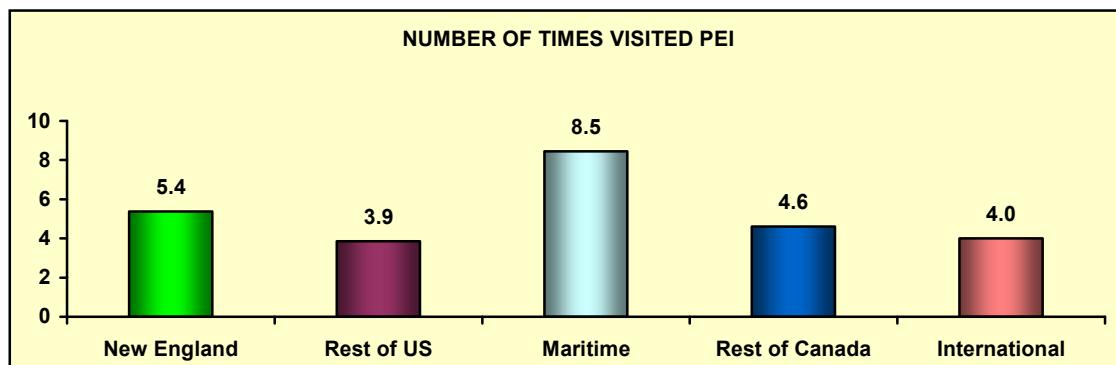
### 17. Return Visitation

A very high 56 percent of return visitors from New England were returning after visiting within the past year. This is equivalent to 32 percent of total New England visitors. The return visitation ratio for US visitors from outside New England was relatively low (25 percent), but among those returning a remarkably high 60 percent had visited within the past year. While this ratio is high it is equivalent to only 15 percent of total visitors from these distant states. This may be an indication of visitors who own a second home on PEI. Among return visitors from all markets, the ratios of US visitors who return within one year is well above the average for all other origins except the Maritimes.



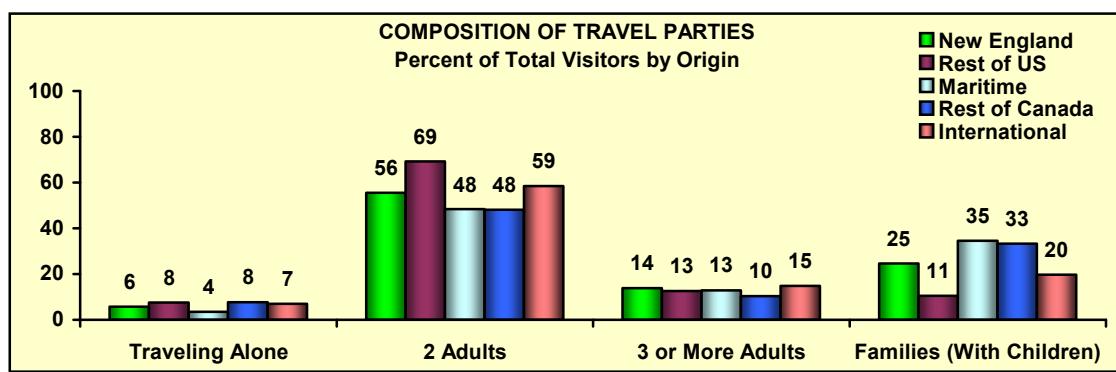
## 18. Number of Times Visited in Past Five Years

Return visitors from New England indicated they have visited the Island almost once a year for the past five years (average 5.4 visits in the past five years). This was well below the average for return visitors from the Maritimes (average 8.5 visits in five years) yet it was above the average for visitors from the rest of Canada (average 4.6 visits). Return visitors from more distant US states indicated they had visited the Island a below average 3.9 times in the past five years.



## 19. Compositions of Travel Parties

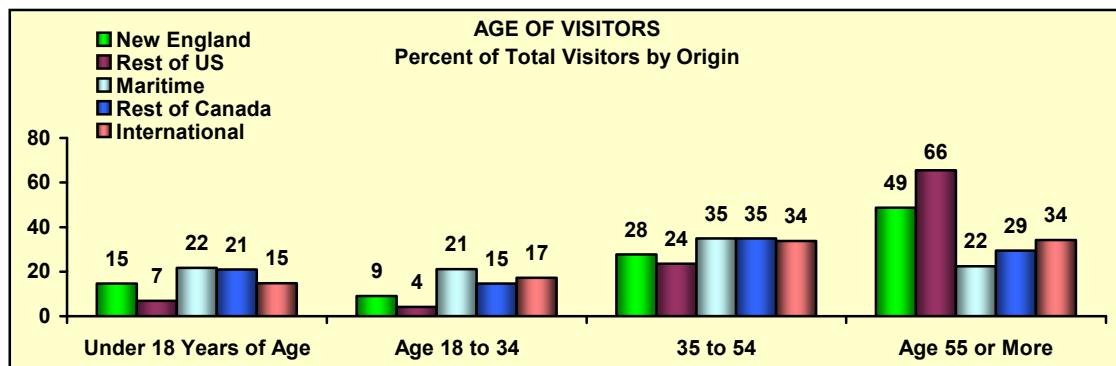
US visitors from all markets are much less likely to be family travellers than visitors from any other origin market except International. This is especially true of US visitors from outside New England. Only 11 percent of these visitors were travelling as a family with children. New England visitors had a much higher ratio of family travellers (25 percent), yet this ratio was well below the ratio for Canadian visitors from outside the Maritimes (33 percent). Parties consisting of two adults dominated visitation from distant US markets (69 percent of parties) and it ran above average for New England visitation (56 percent of parties).



## 20. Age of Visitors

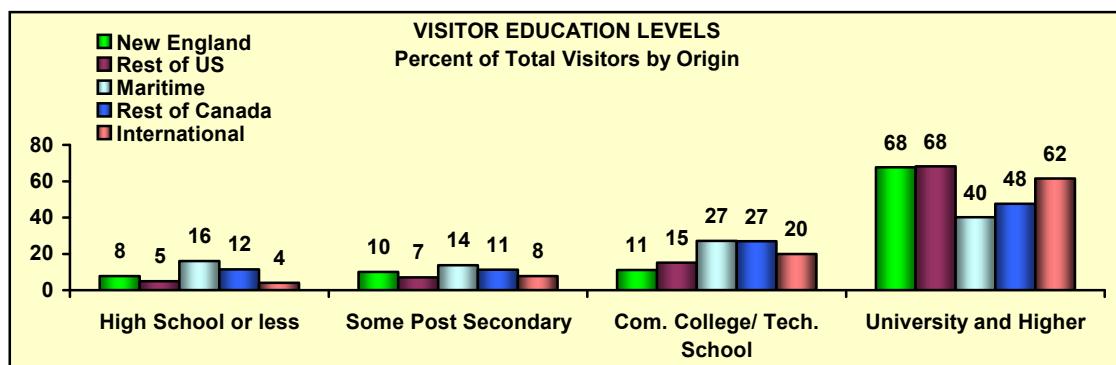
US visitors from all markets were very skewed toward older age levels. Two thirds (66 percent) of visitors from distant US states were 55 or more years of age. The ratio for New England visitors was considerably lower yet well above average (49 percent were 55 or more years of age).

US visitation was extremely weak in the 18 to 34 age category. Only 9 percent of total New England visitors and 4 percent of visitors from more distant US states fell in this age group. These ratios were far below average compared to all other markets of origin. The 35 to 54 age category was also very low for visitors from distant US states (24 percent). It was somewhat better yet still below average for New England visitors (28 percent).



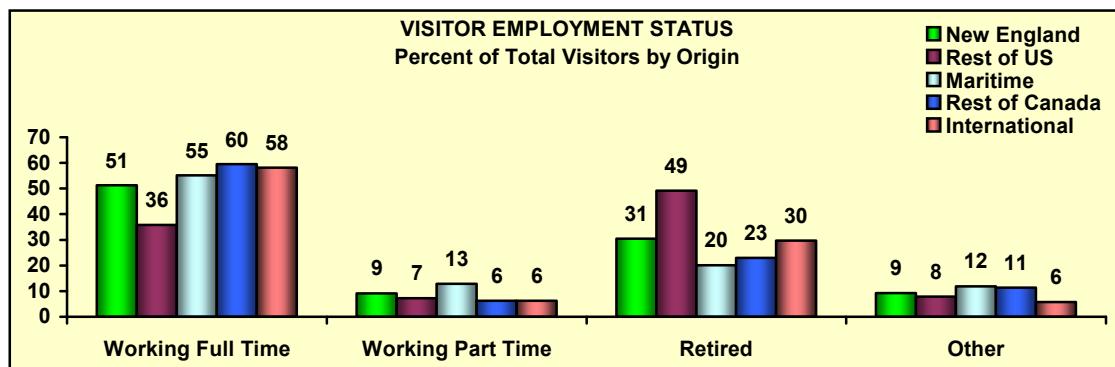
## 21. Education

Education levels for all US visitors who completed the exit survey were far above average compared to visitors from Canada and even International markets. More than two thirds (68 percent) of the heads of parties from both New England and distant US states had University or higher levels of education. This compares with only 48 percent of Canadian visitors from outside the Maritimes and 62 percent of International visitors. An additional 11 percent of New England visitors and 15 percent of visitors from distant US states had graduated Community College or Technical School.



## 22. Employment Status

More US visitors who completed the exit survey were retired than are visitors from any other origin market. Almost one half (49 percent) of US visitors from outside New England are retired. This ratio drops to 31 percent for visitors from New England which is much lower yet still above average. Only 51 percent of New England visitors indicated they are working full time. This ratio drops to 36 percent for US visitors from outside the New England States.



## 23. Household Income

The annual household incomes of US visitors tend to run very high overall and especially high for US visitors from outside New England. More than one third (35 percent) of visitors from outside New England have household incomes of \$125,000 or more. An additional 27 percent have incomes of \$80,000 to \$124,999.

Annual household incomes of New England visitors were considerably lower; they tended to match very closely with the incomes of Canadian visitors from outside the Maritimes. More than one in four New England visitors (27 percent) reported annual household incomes of \$125,000 or more. The Canadian equivalent was 26 percent.

