

2007 PEI Exit Survey: OVERVIEW OF RESULTS MAIN SEASON

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Background

- The TRC was created as a Tourism Advisory Council initiative to improve the competitiveness of PEI tourism.
- The TRC is funded by ACOA, Tourism PEI, and the University of PEI.
- The funding model was an 18-month “pilot project” that officially began in April 2006.
- A new funding proposal is being reviewed by ACOA and the Department of Tourism.

Mission of the TRC

- To be an independent agency dedicated to academic accuracy and the integrity of data analysis.
- To expand tourism research capacity on PEI.
- To become a one-stop resource for relevant and timely information and intelligence to all stakeholders in the tourism industry.
- To produce reports and distribute information that will answer key questions and serve as real tools for decision makers.

2007 Exit Survey

- Starting in the fall of 2006, the TRC re-designed the survey and the methodology to be used to implement the exit survey.
- Key Changes - Collects data on:
 - Place of origin, not region
 - Each member of travel party
 - Car rental
 - Primary destination and primary reason for taking trip
 - Number of nights stayed, in total, by region, and type of accommodation

Major Changes (cont)

- For first time visitors, collects data on the primary feature that attracted them to PEI.
- For repeat visitors, collects data on number of previous visits and when.
- Asks for ratings on: Accommodation, restaurant, and transportation service and quality; quality of customer service; price/value; and variety of things to see and do.

Major Changes (cont)

- Asks visitors to rate the following:
 - My trip to PEI was good value for money spent.
 - My trip to PEI was a good way to spend my time.
 - I will visit PEI again.
 - I will recommend PEI as a travel destination to others.

- Collects more precise demographic data.

The Methodology

- Exit survey is now administered year-around instead of just during the June to September period.
- The intercept and follow-up phone call method of collecting surveys was changed.
- Direct intercepts are now used at two exit points: Airport and Wood Islands. Mail back surveys distributed at the Bridge.

The Methodology

- Goal - 4,150 surveys completed over the year: 65% (2,700) at the Bridge, 20% at ferry, 15% at airport.
- Mix by visitor origin: 57% Canada, 29% US, 14% International.
- Largest visitor markets surveyed: Ontario, New England, NS, NB, Rest of US, Quebec, Rest of Canada.
- Overweight certain markets to ensure valid sample.

The Methodology

- Tested revised survey and methodology in May, early June.
- Launched survey mid-June. First completed surveys received June 27.
- 3,173 surveys collected by September 30.
- Bridge response rate: very solid 22%.
- Data quality is very high.

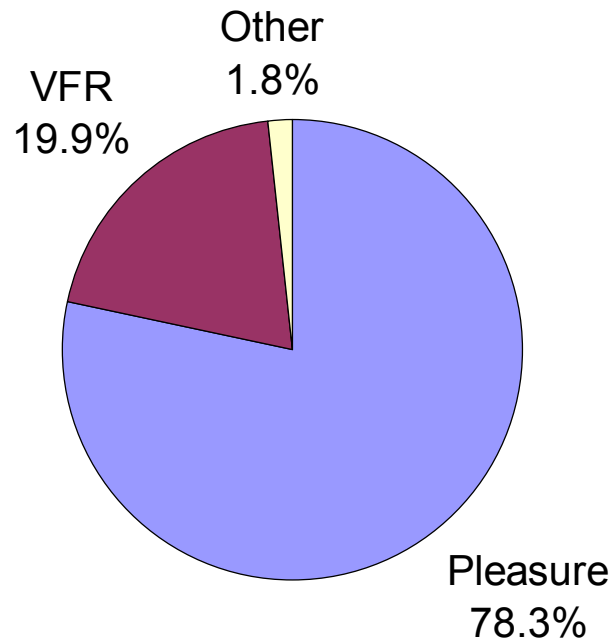
Results for Main Season

Geographical Tourism Markets	Number of Travel Parties	% of Travel Parties	Average Travel Party Size	Number of Visitors estimated	Average Spending per Party	Total Expenditures estimated	% of Expenditures
Overnight Pleasure	223,378	100.0%	2.97	663,952	\$1,024.65	\$228,883,301	100.0%
Canada	190,616	85.3%	3.02	575,790	\$1,001.34	\$190,870,504	83.4%
New Brunswick	46,910	21.0%	3.11	145,765	\$765.62	\$35,915,583	15.7%
Nova Scotia	65,972	29.5%	3.11	204,862	\$803.76	\$53,025,878	23.2%
Quebec	30,060	13.5%	2.84	85,464	\$1,191.81	\$35,825,591	15.7%
Ontario	36,598	16.4%	3.04	111,341	\$1,358.46	\$49,716,630	21.7%
Alberta	5,152	2.3%	2.45	12,612	\$1,681.09	\$8,660,244	3.8%
British Columbia	2,554	1.1%	2.23	5,703	\$1,160.97	\$2,964,947	1.3%
Rest of Canada	3,370	1.5%	2.35	1,786	\$1,195.72	\$908,772	0.4%
United States	21,879	9.8%	2.73	59,663	\$1,203.36	\$26,328,286	11.5%
New England	11,070	5.0%	2.92	32,368	\$1,196.41	\$13,244,744	5.8%
Middle Atlantic	2,107	0.9%	2.45	5,151	\$1,227.42	\$2,585,607	1.1%
South Atlantic	2,525	1.1%	3.03	7,661	\$1,228.29	\$3,101,462	1.4%
North & South Central	4,009	1.8%	2.50	10,014	\$1,184.06	\$4,746,776	2.1%
Rest of US	2,168	1.0%	2.06	4,470	\$1,222.12	\$2,649,696	1.2%
International	10,883	4.9%	2.62	28,499	\$1,073.61	\$11,684,511	5.1%
Europe	6,696	3.0%	2.48	16,636	\$1,039.01	\$6,956,799	3.0%
Japan	982	0.4%	2.95	2,900	\$1,095.26	\$1,075,072	0.5%
Other Countries	3,206	1.4%	2.80	8,963	\$1,139.23	\$3,652,640	1.6%

Results for Main Season

- Detailed Data Provided on the Following Figures and Tables

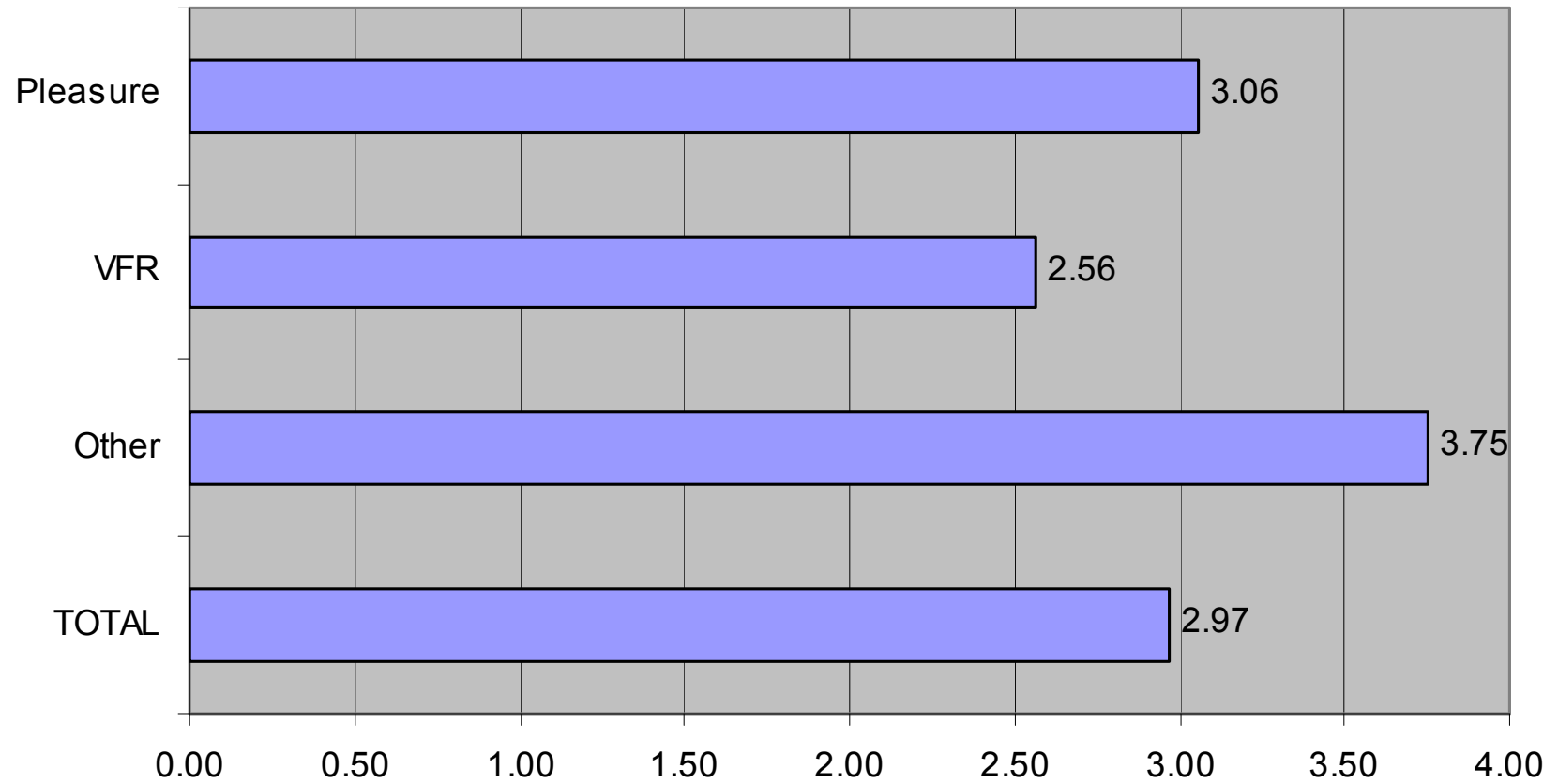
Primary Reason for Trip



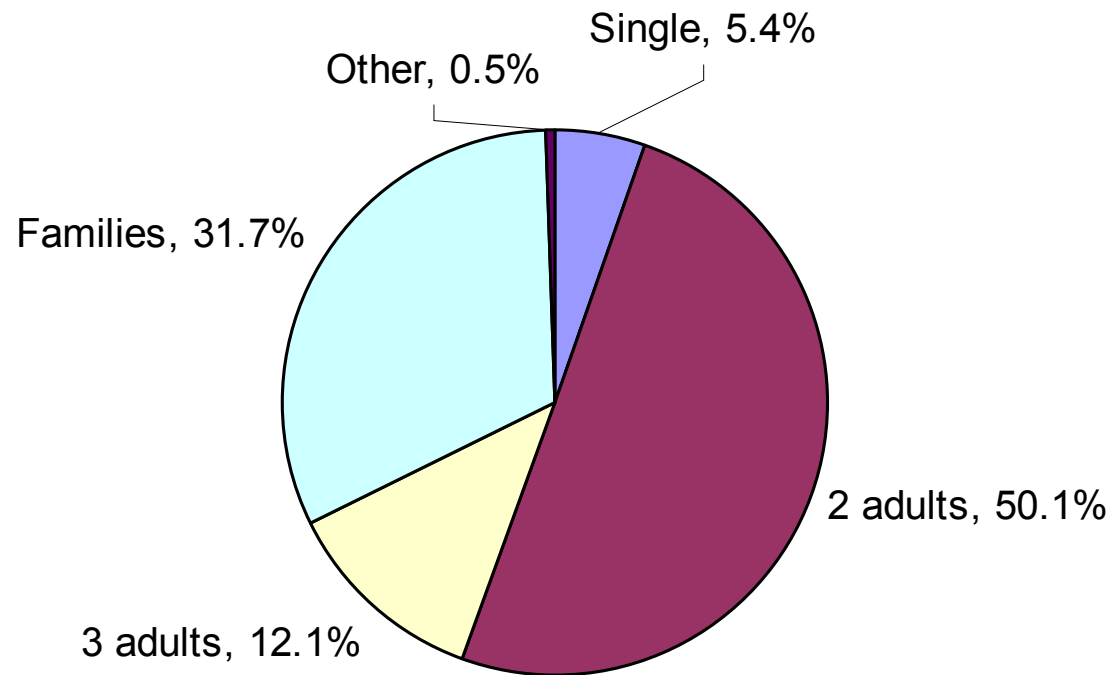
Note: **Pleasure trips** include holiday, vacation, short getaway, visiting second home, attending events, festivals and attractions, and other pleasure purposes; **Other trips** include attending a wedding, attending a family reunion/meeting, educational study, and other purposes visits.

	<u>Pleasure</u>	<u>VFR</u>	<u>Other</u>	<u>Total</u>
Average Party Size	3.06	2.56	3.75	2.97
Total Nights of Trip	8.27	6.98	6.69	7.98
Nights in PEI	4.97	5.04	4.71	4.98

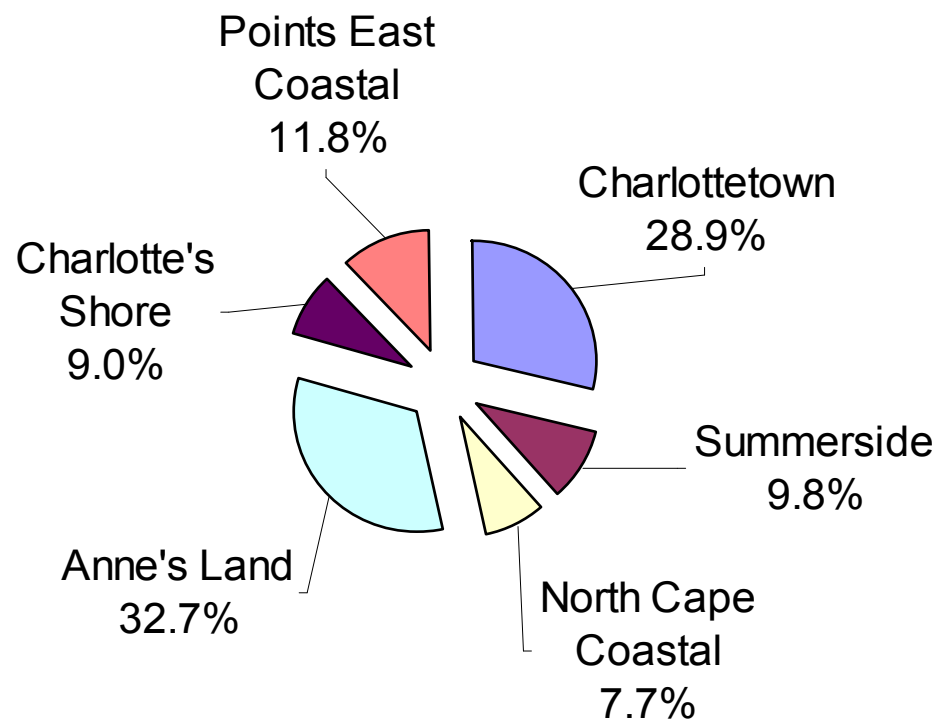
Average Party Size



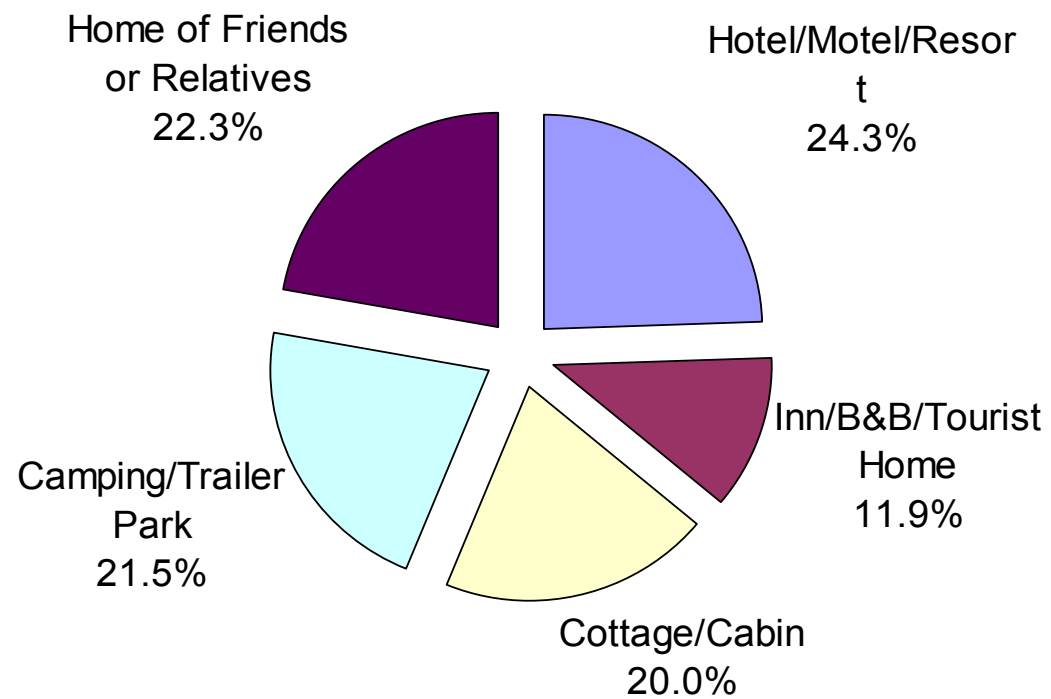
Type of Party



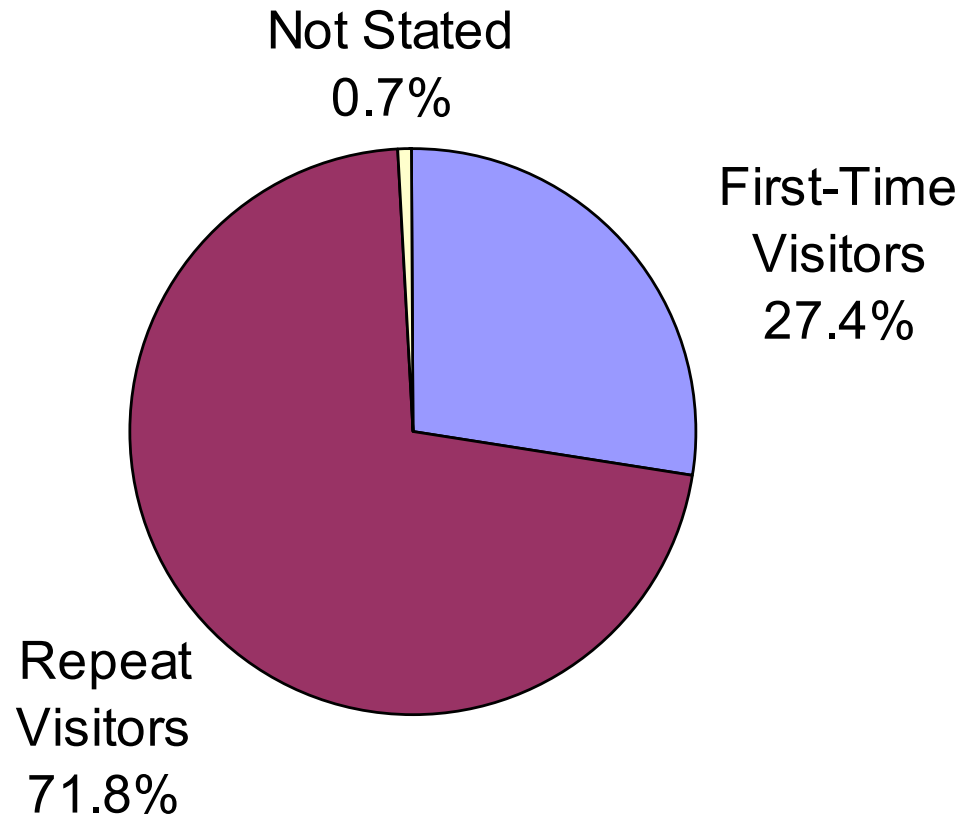
Area Stayed Overnight



Types of Accommodation Used

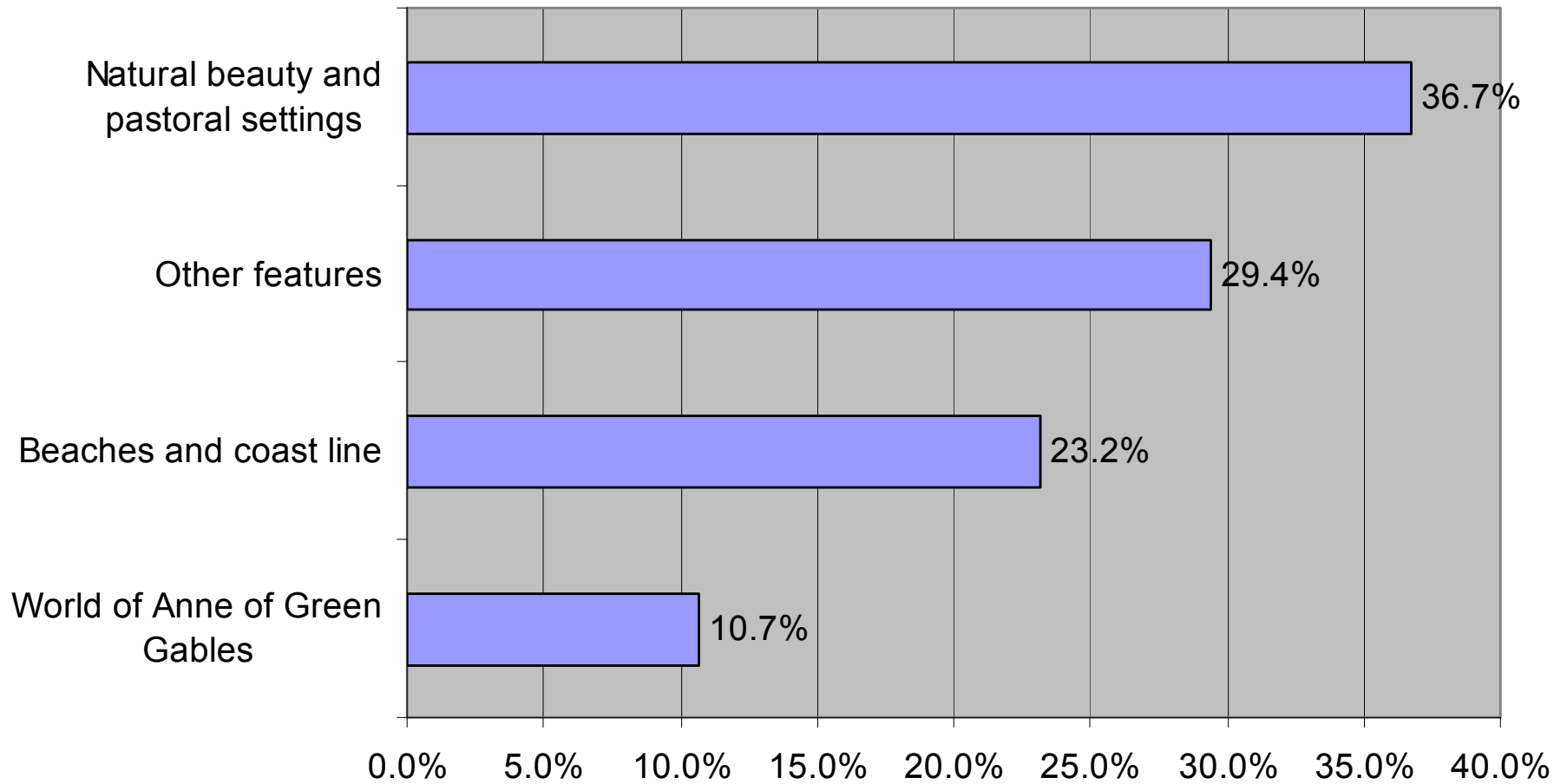


Mix of Visitors: First-Time/Repeat

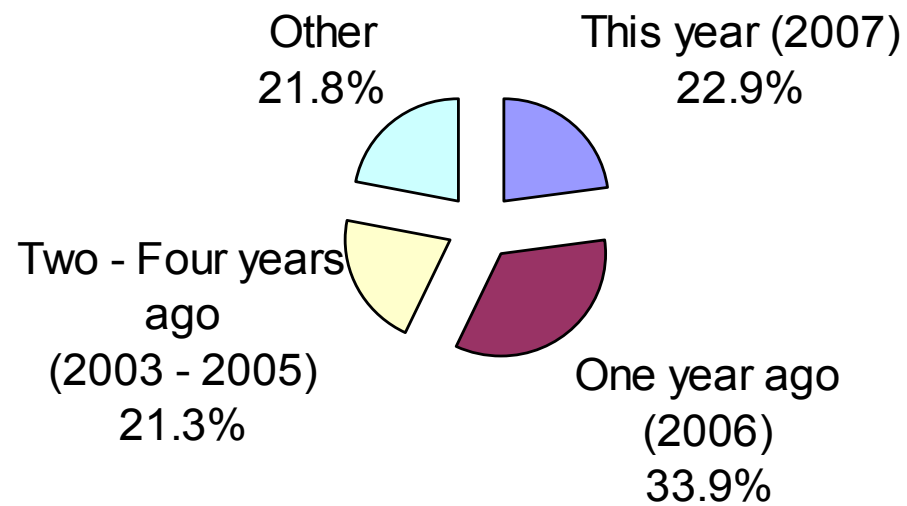


	Pleasure	VFR	Other
First-Time Visitors	31.7%	11.9%	14.6%

Primary Feature that Attracted First-Time Visitors

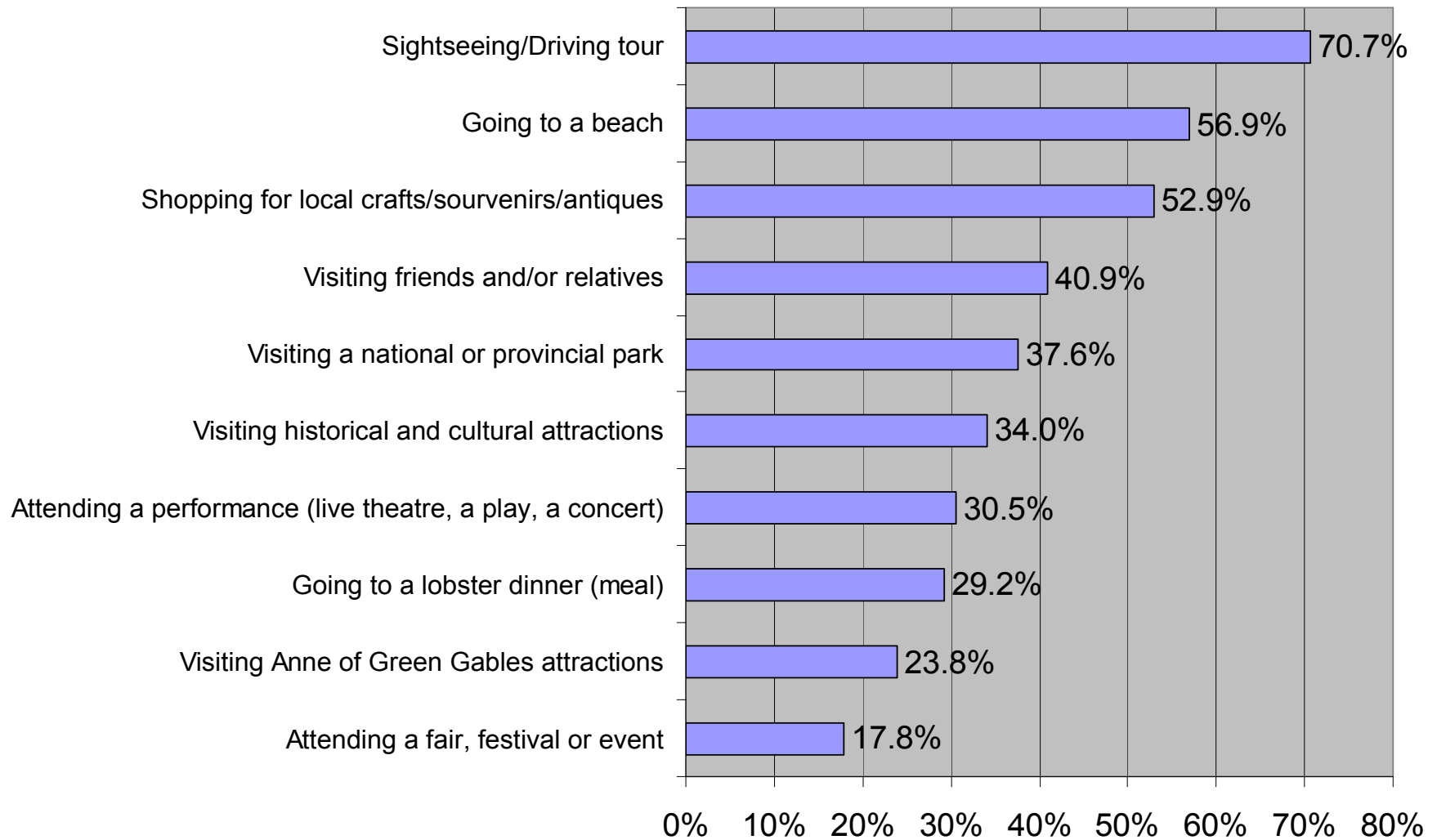


Repeat Visitors: Last Trip Taken



	Pleasure	VFR	Other	Total
Average Number of Times Visited	6.75	8.41	6.64	7.17

Travel Activities



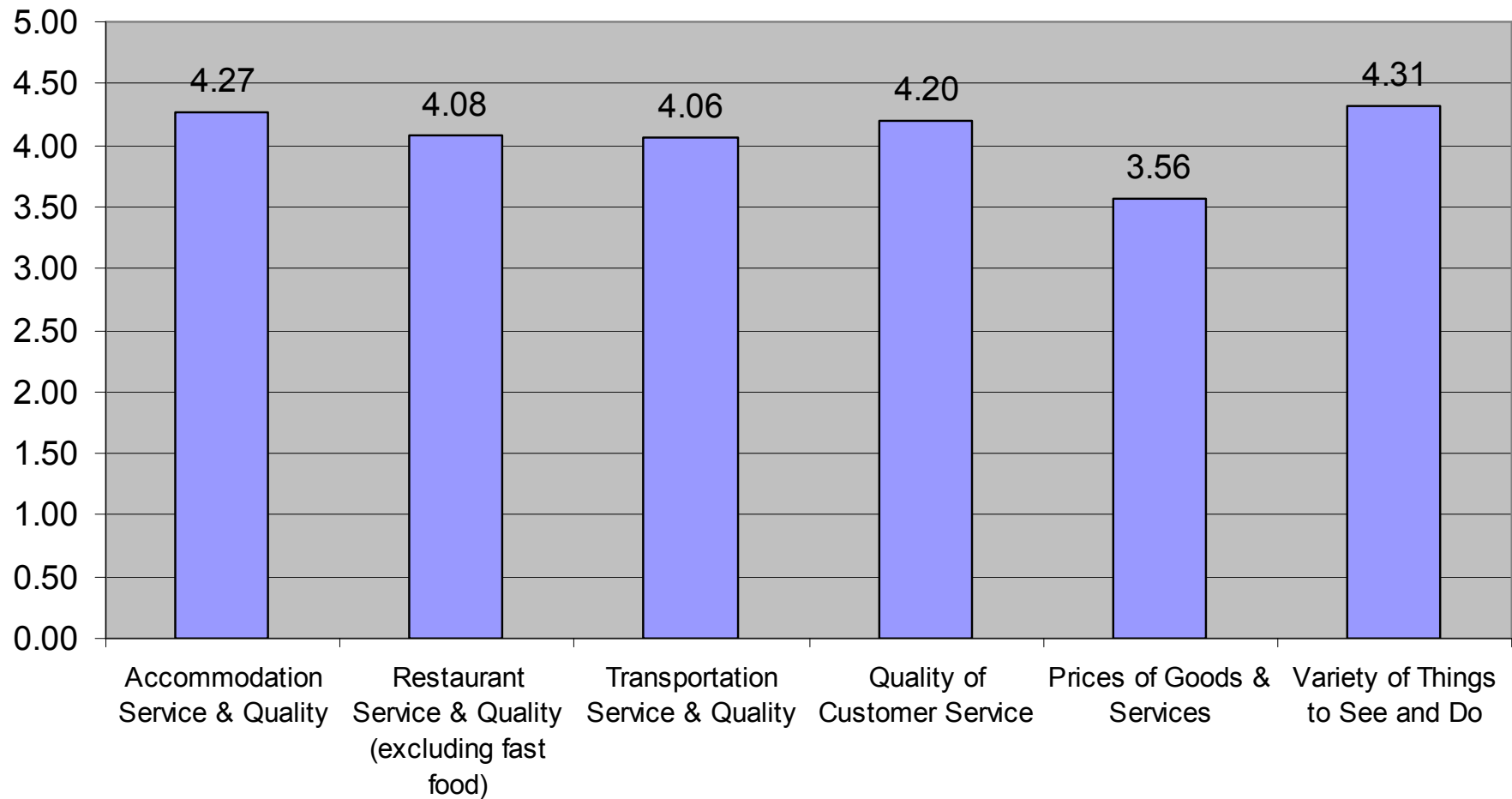
Estimated Travel Spending per Person per Night by Category

Accommodation	\$45.16
Restaurants	\$24.02
Food & Beverages at Stores	\$11.06
Vehicle & Transportation	\$13.76
Car Rental	\$30.09
Shopping	\$18.68
Recreation & Entertainment	\$19.07
Other Expenditures	\$15.18
Spending per Person per Night	\$100.80

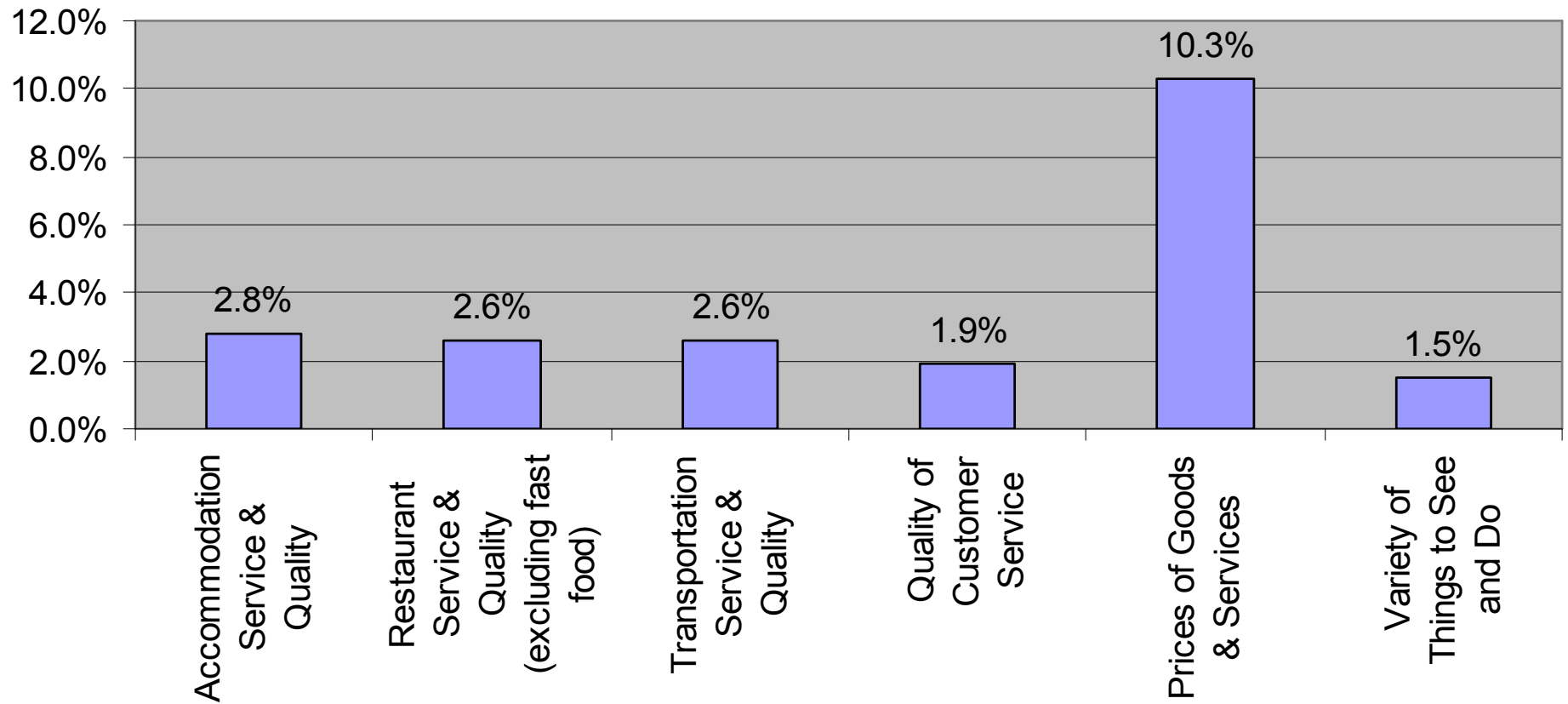
Total Expenditures =
\$228,883,301

Spending per Trip
(Party) = \$1,024.65

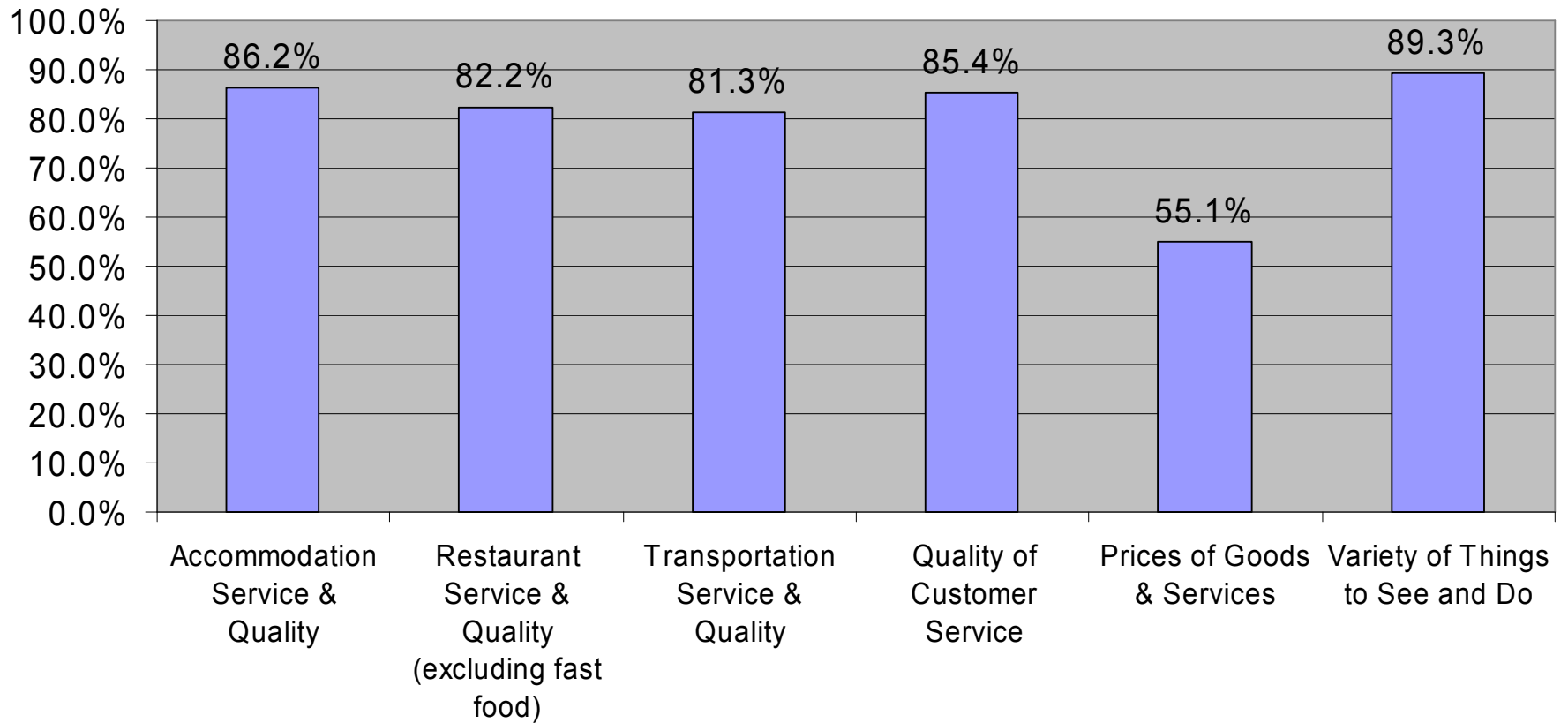
Rating of Travel Services



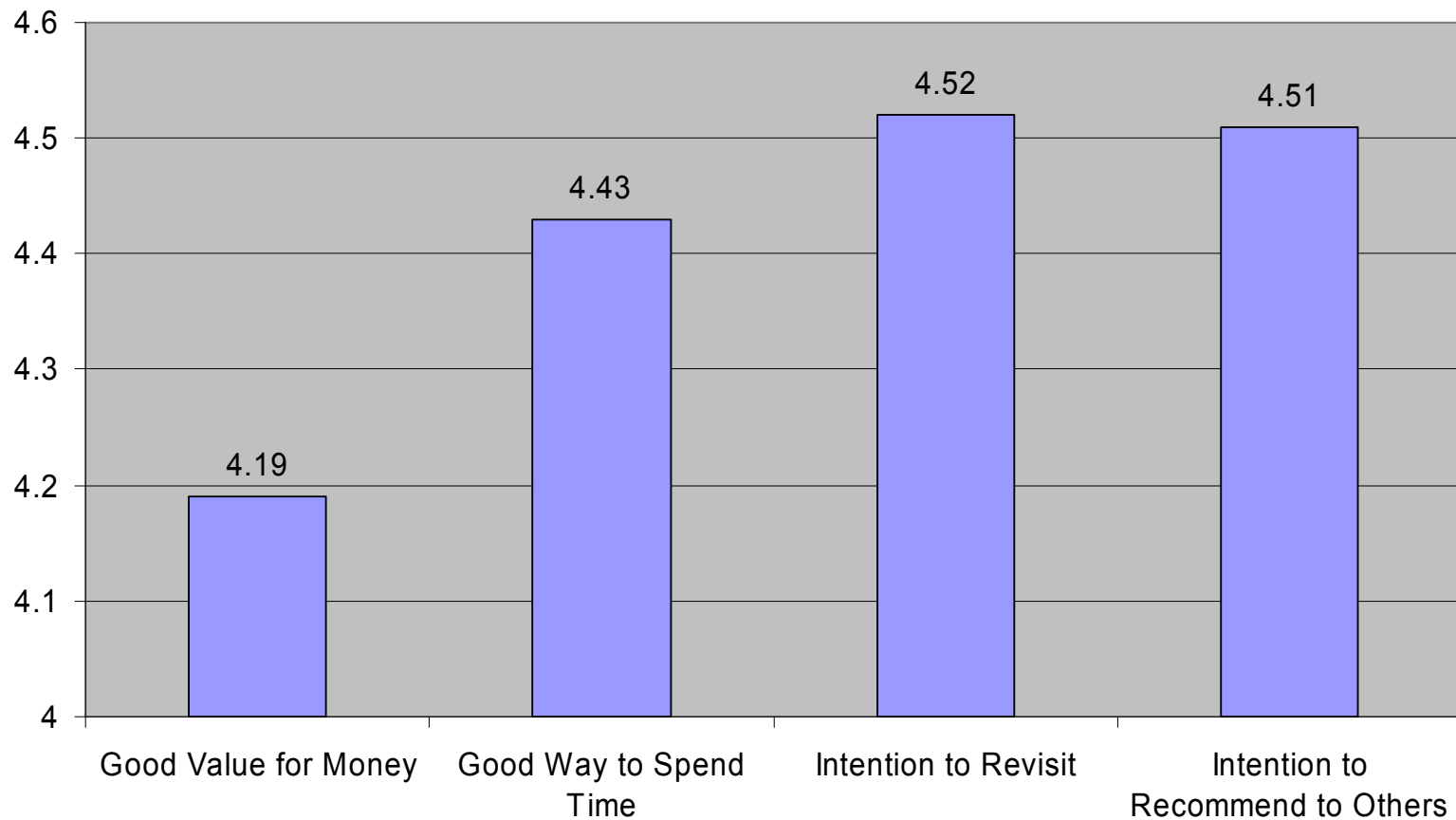
Travel Services: Percent Selecting Very Poor or Poor



Travel Services: Percent Selecting Good or Excellent

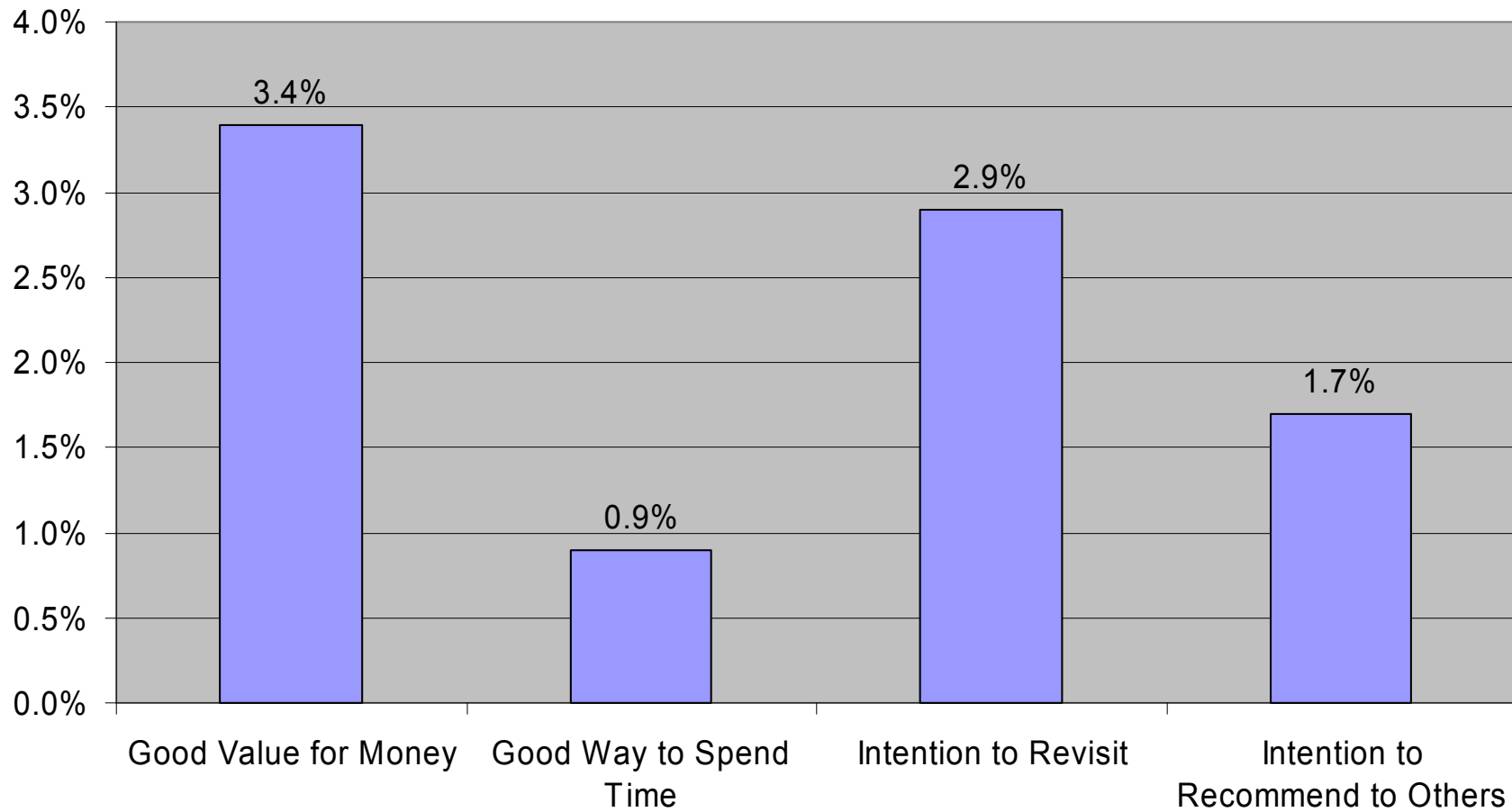


Overall Rating of PEI as a Destination

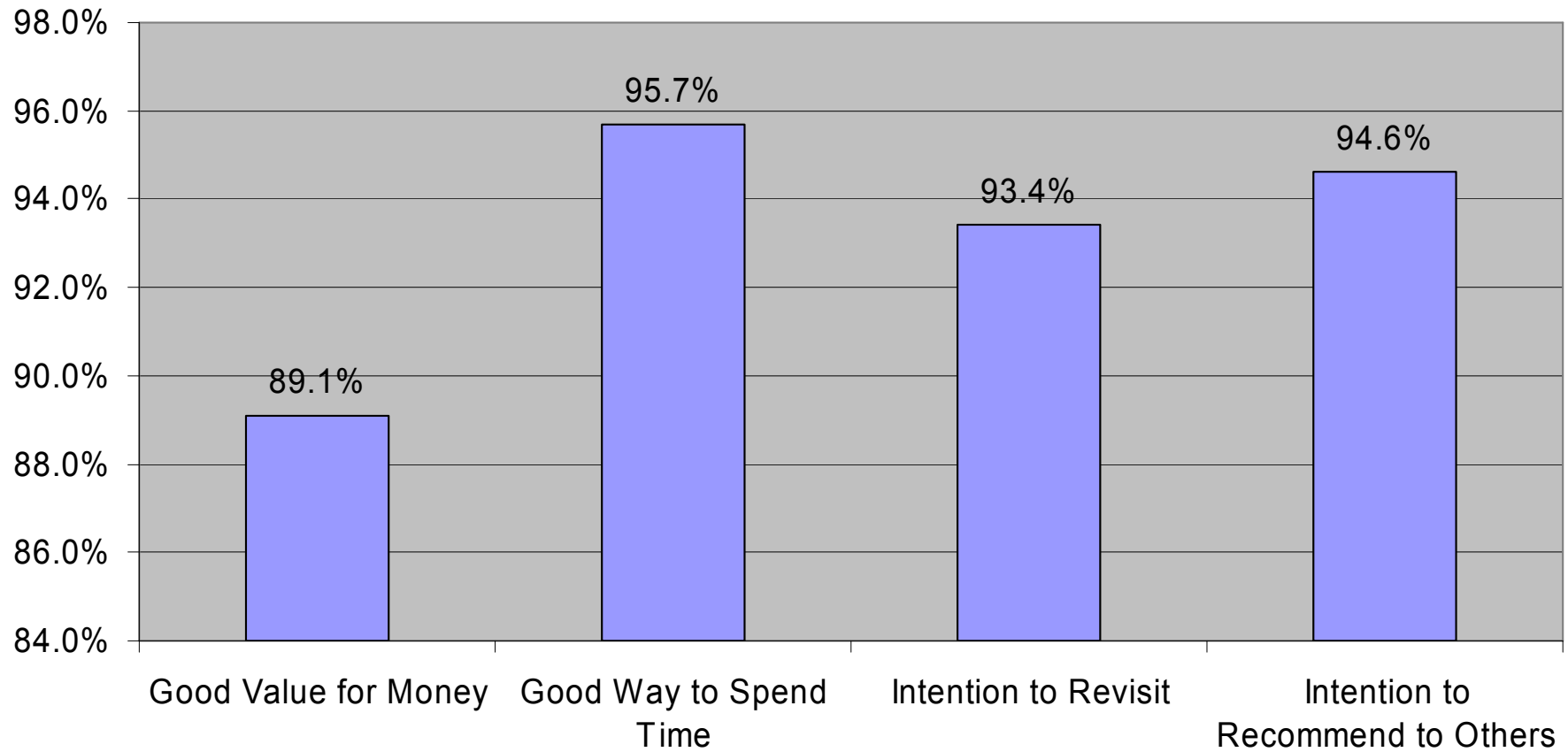


Only 13.2% of travel parties had complaints

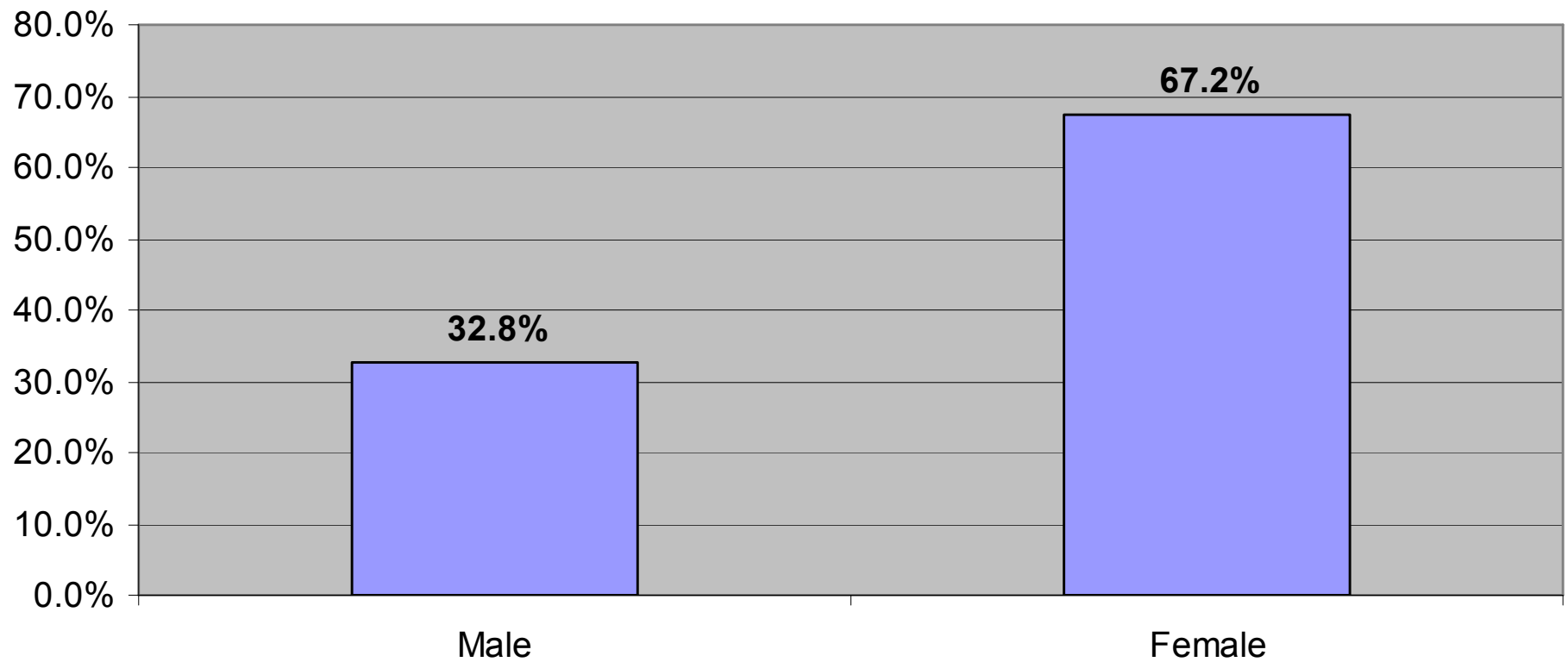
Overall Rating of PEI: Percent Disagreeing



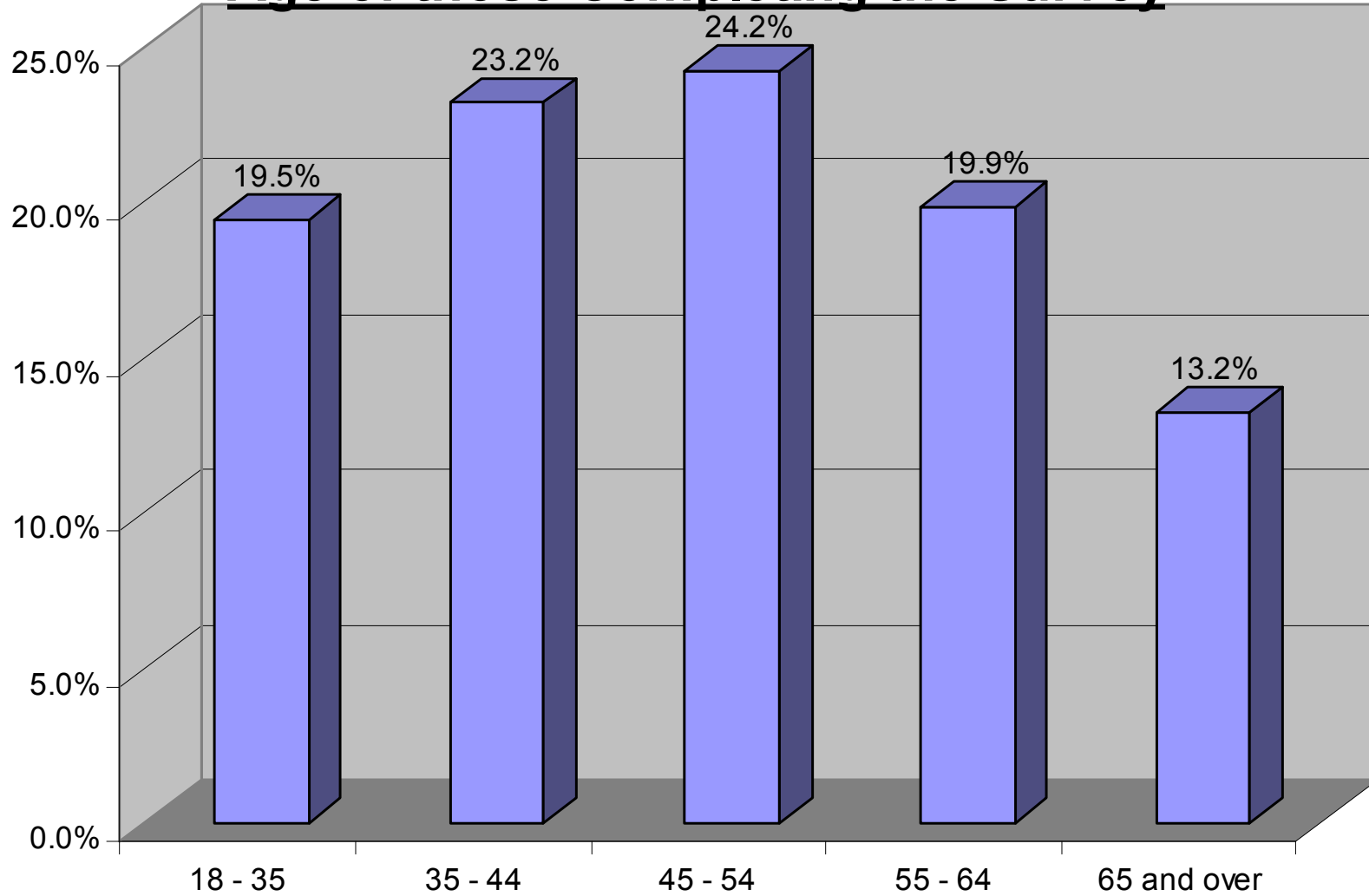
Overall Rating of PEI: Percent Agreeing



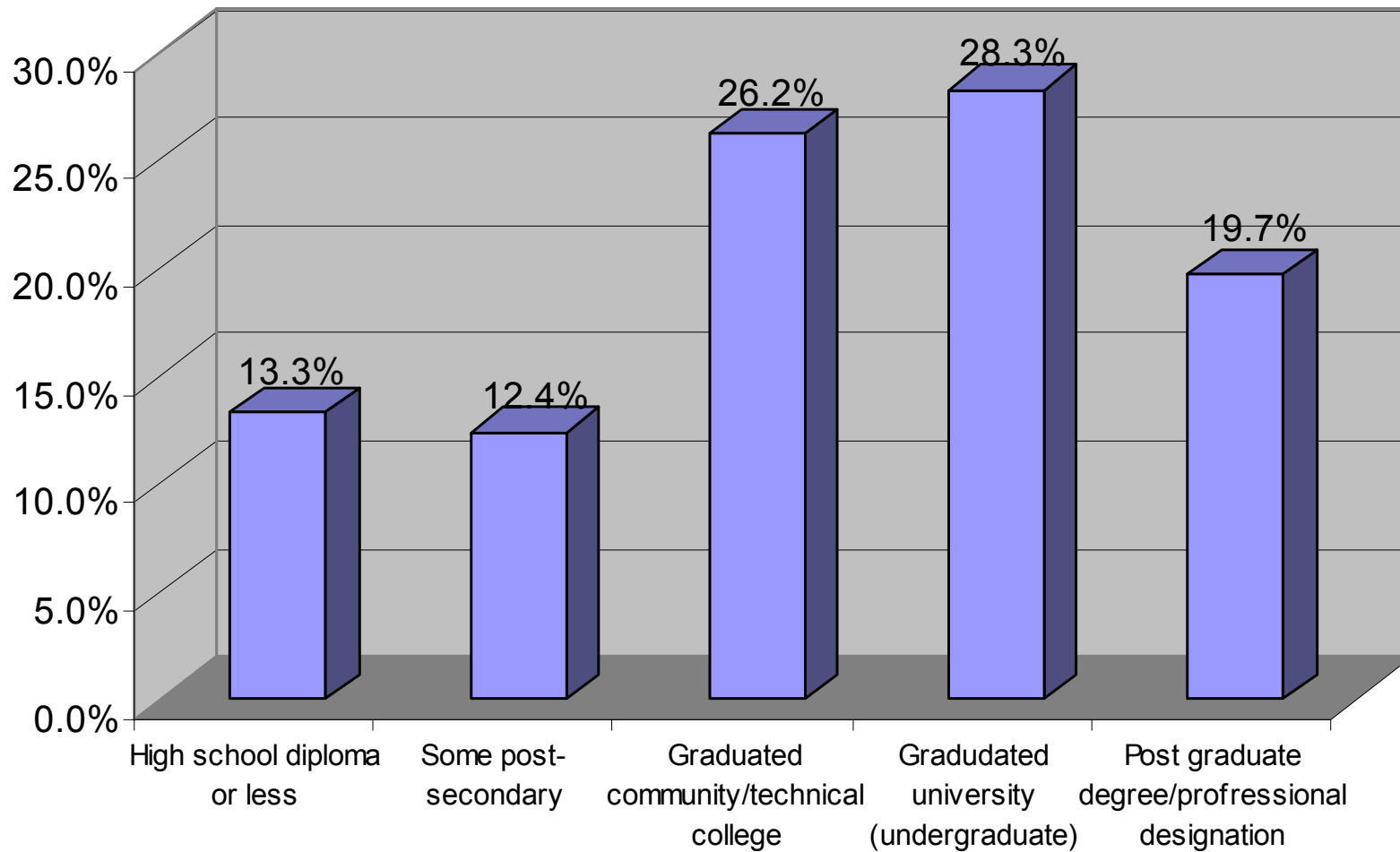
Gender of Those Completing the Survey



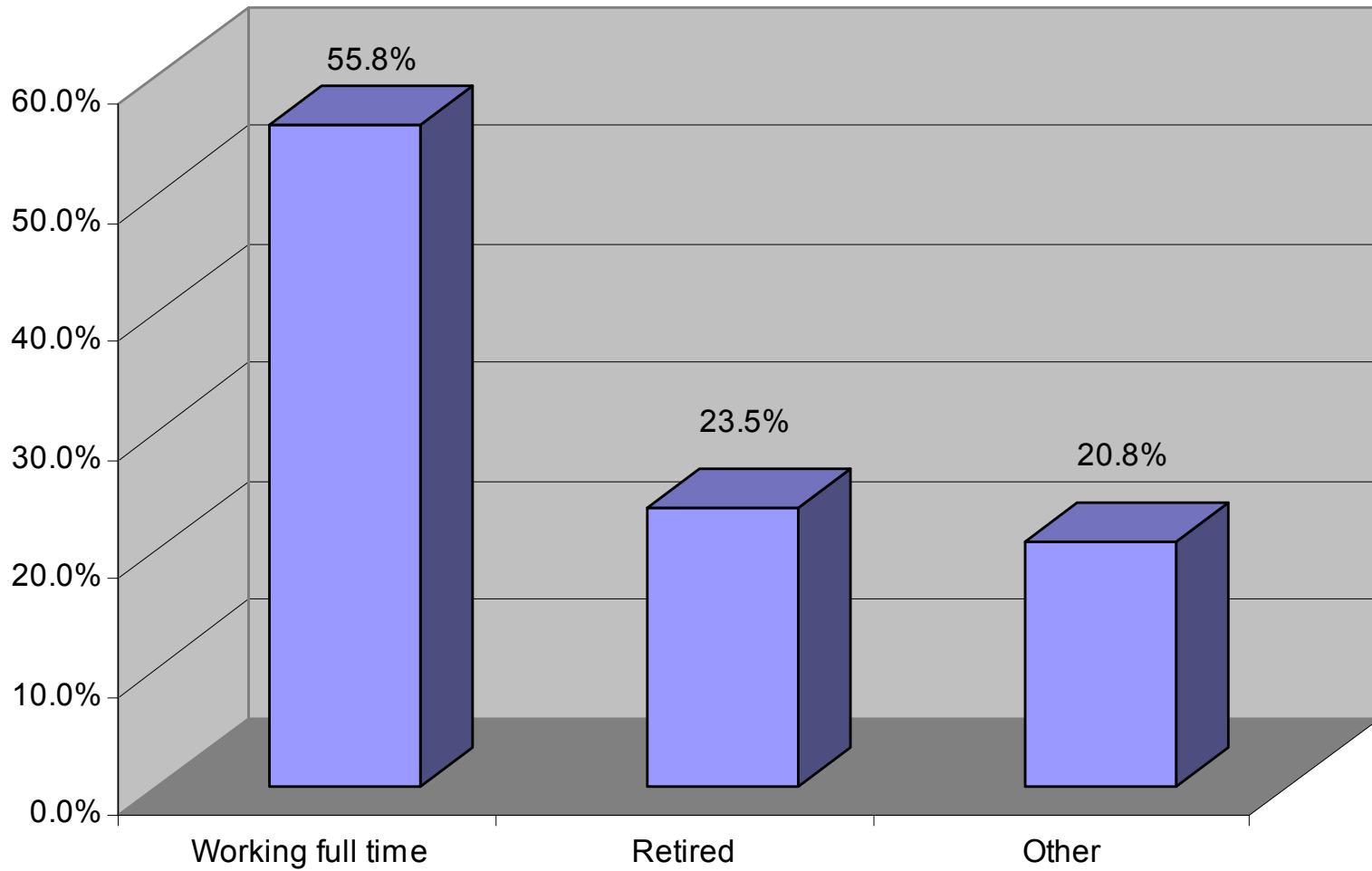
Age of those Completing the Survey



Education Level



Employment Status



Annual Household Income

