

EXIT SURVEY REPORT SERIES: ES2023-13



NEW BRUNSWICK

AS A TRAVEL MARKET FOR PEI: RESULTS FROM THE 2023 EXIT SURVEY

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Market Overview

- ❑ According to the results of PEI Tourism Value Model estimation and analysis of the 2023 PEI Travel Survey of Visitors (Exit Survey), ***New Brunswick (NB) was Prince Edward Island (PEI)'s 1st largest geographical travel market*** in terms of visitor arrivals and overnight stays (total number of nights stayed) in PEI in 2023.
- ❑ These represent an estimated 530,400 individual visitors (36%) or 208,800 parties (37%) to PEI and 478,500 nights stayed (24%) in PEI. Of these, approximately 39 percent visited PEI during the July-August summer main season, and not surprisingly, the vast majority of parties (97%) entered and exited PEI via the Confederation Bridge.
- ❑ Focusing on ***NB overnight pleasure travellers to PEI***, the number of individual overnight pleasure travellers accounted for 357,500 travellers (31%) or 130,700 parties (32%) and their overnight stays accounted for 445,200 nights (23%).
- ❑ The ***average party size*** and ***average trip duration*** for NB overnight pleasure travel parties were 2.74 persons and 3.41 nights, respectively.
- ❑ ***Total direct expenditures*** by NB overnight pleasure travel parties were estimated at approximately \$159 million.
- ❑ NB overnight pleasure travellers spent an average of \$1,215 *per party per visit* and \$130 *per person per night* on PEI.





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Market Overview *(cont'd)*

- ❑ With respect to *the trip purpose*, approximately 30 percent of NB overnight pleasure travel parties indicated that they travelled to PEI for a holiday or vacation, 27 percent travelled to PEI primarily to visit friends and/or relatives, and 22 percent travelled to PEI for a short getaway.
- ❑ In terms of *primary features that attracted* NB overnight pleasure travel parties to PEI, approximately 23 percent of parties were attracted to PEI by 'restful and relaxing place,' 22 percent were attracted by 'other features,' 18 percent were attracted by 'beaches and coastline,' and 13 percent were attracted by 'natural beauty and pastoral settings.'
- ❑ In terms of *travel party characteristics*, approximately 39 percent of NB overnight pleasure travel parties travelled with their spouse/partner (two people), 17 percent were single travellers, and 16 percent travelled to PEI as a family (including children under 18).
- ❑ Looking at *party composition*, the majority (79%) of NB overnight travel parties were comprised of only adults.
- ❑ Regarding *age composition* of NB overnight pleasure travel parties, approximately 49 percent of parties were comprised of adults aged 55 and over (senior travellers), approximately eight percent were between the ages of 35 and 54 (middle aged travellers), and six percent were comprised of young adult travellers (aged 18 to 34).





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Market Overview *(cont'd)*

- ❑ While approximately 21 percent of NB overnight pleasure travel parties were families (adults with children), 15 percent of overnight pleasure travel parties were comprised of travellers of varying age generations.
- ❑ Looking at *individual NB overnight pleasure travellers to PEI*, overnight visitors were comprised of more females than males (52% versus 48%). Almost half (49%) of NB overnight pleasure travellers were aged 55 and over, 37 percent were aged between 18 and 54, and 15 percent were aged 18 and under.
- ❑ In terms of *type of visitation to PEI and repeat visit pattern*, the vast majority (93%) of NB overnight pleasure travel parties had previously visited PEI. The majority of these parties had last visited PEI recently: 48 percent had last visited earlier in the same year of the trip in which they were surveyed, and 30 percent had last visited one year ago.
- ❑ On average, NB repeat overnight pleasure travellers had visited PEI approximately six times in the past five years, suggesting annual visits for some parties.
- ❑ According to the result of *total accumulated nights spent by NB parties in the specific region in PEI*, the most popular tourism regions were the Greater Charlottetown Area and the Green Gables Shore region. Approximately 34 percent of nights stayed were spent in the Greater Charlottetown Area and 32 percent were spent in the Green Gables Shore region.





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Market Overview *(cont'd)*

- ❑ NB overnight pleasure travel parties stayed in a variety of accommodation types while in PEI. According to the result of **total accumulated nights spent in the specific type of accommodation in PEI** by NB travel parties, the most popular types of accommodation were home of friends or relatives (27%), cottage or cabin (23%), and hotel, motel or resort (22%).
- ❑ Regarding **PEI regions visited** while NB overnight pleasure travel parties were on PEI, the Greater Charlottetown Area (63%) was the most popular region, followed by the Green Gables Shore region (46%), Summerside Area (35%), the Red Sands Shore region (22%), the Points East Coastal Drive region (20%), and the North Cape Coastal Drive region (19%). Note, a **“visit”** is defined as staying overnight, dining, visiting an attraction, or participating in an activity in the region, and does not include those travelling through the region only.
- ❑ NB overnight pleasure travel parties participated in a variety of **travel activities** while they were on PEI. Driving tour (scenic drives/views) (49%), going to a full-service restaurant (47%), and visiting friends and/or relatives (46%) were the most popular activities among NB overnight pleasure travel parties.





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Market Overview *(cont'd)*

- ❑ **Other popular activities** took part in by NB overnight pleasure travel parties included going to a beach (42%), shopping for general merchandise (42%), shopping for local products (40%), sightseeing, appreciating pastoral or rural settings (35%), visiting a national or provincial park (29%), sampling local culinary products (24%), and seeing natural wonders (22%).
- ❑ **Total direct expenditures** by NB overnight pleasure travel parties were estimated at approximately \$159 million. The items that accounted for the greatest proportion of total direct expenditures were accommodations (\$54.4 million; 34%), followed by food and beverage at restaurants, bars, hotels, including take-out (\$30.5 million; 19%), shopping (\$21.9 million; 14%), vehicle operation (\$17.1 million; 11%), recreation and entertainment (\$11.7 million; 7%), food and beverage at stores (\$11.6 million; 7%), other expenses (\$5.6 million; 4%), travel package (\$4.8 million; 3%), and car rental and local transportation (\$1.2 million; 1%).
- ❑ Visitors were asked to rank various **PEI travel services and evaluation, overall satisfaction, and behavioural intention**. Overall, NB overnight pleasure travel parties were pleased with aspects of their trip to PEI and highly intend to recommend PEI as a travel destination to others and visit PEI again.
- ❑ In terms of **complaints about their trip to PEI**, only seven percent of NB overnight pleasure travel parties indicated they experienced a problem or had a complaint about their trip to PEI, which was significantly lower than that of all overnight pleasure travel parties (8%).





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Market Profile

Total New Brunswick
Visitors to PEI in 2023

530,400

person arrivals

NB Overnight Pleasure
Travellers

357,500

person arrivals

NB Overnight Pleasure
Travel Parties

130,700

party arrivals

Average Party Size for NB
Overnight Pleasure
Travellers

2.74

persons

Total Overnight Stays in
PEI by NB Overnight
Pleasure Travellers

445,200

nights

Average Trip Duration in
PEI by NB Overnight
Pleasure Travellers

3.41

nights

Average Nights Stayed in
Paid Accommodation in
PEI by NB Overnight
Pleasure Travellers

2.61

nights

Estimated Total Direct
Expenditures in PEI by NB
Overnight Pleasure
Travellers

\$158.8

million

Average Spending by NB
Overnight Pleasure
Travellers

\$130.40

per person per night

Average Spending by NB
Overnight Pleasure
Travellers

\$1,214.91

per party per visit



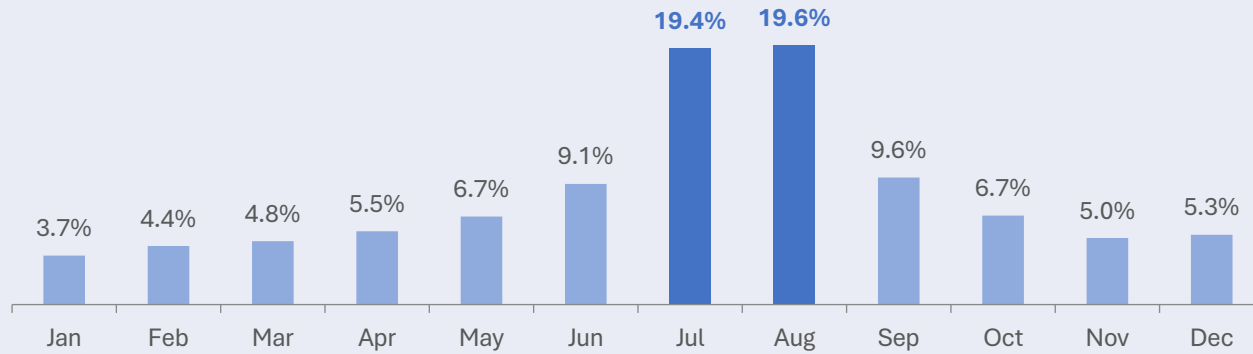


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When Visitors Come and How Visits PEI

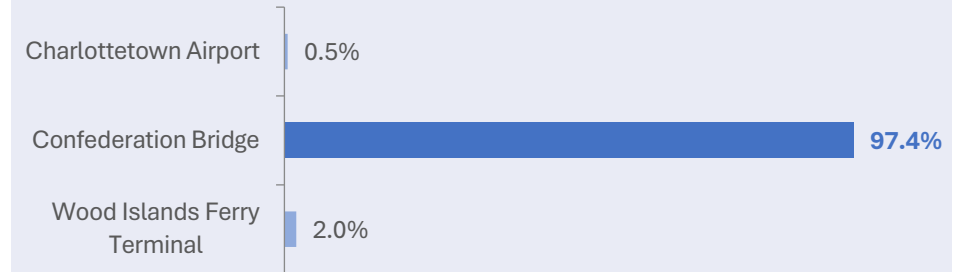
Month of Visit by NB Residents in 2023



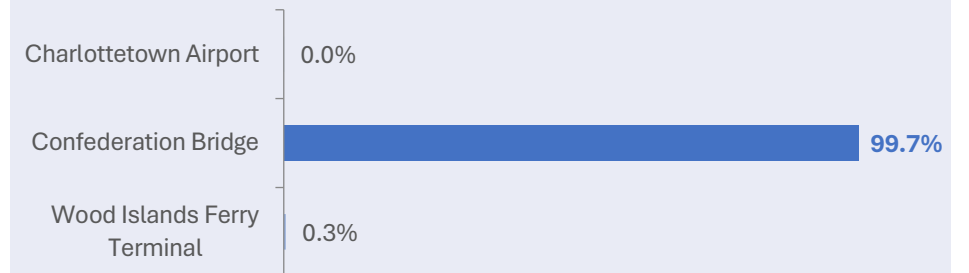
Mix of Entry and Exit Points



Entry Point



Exit Point



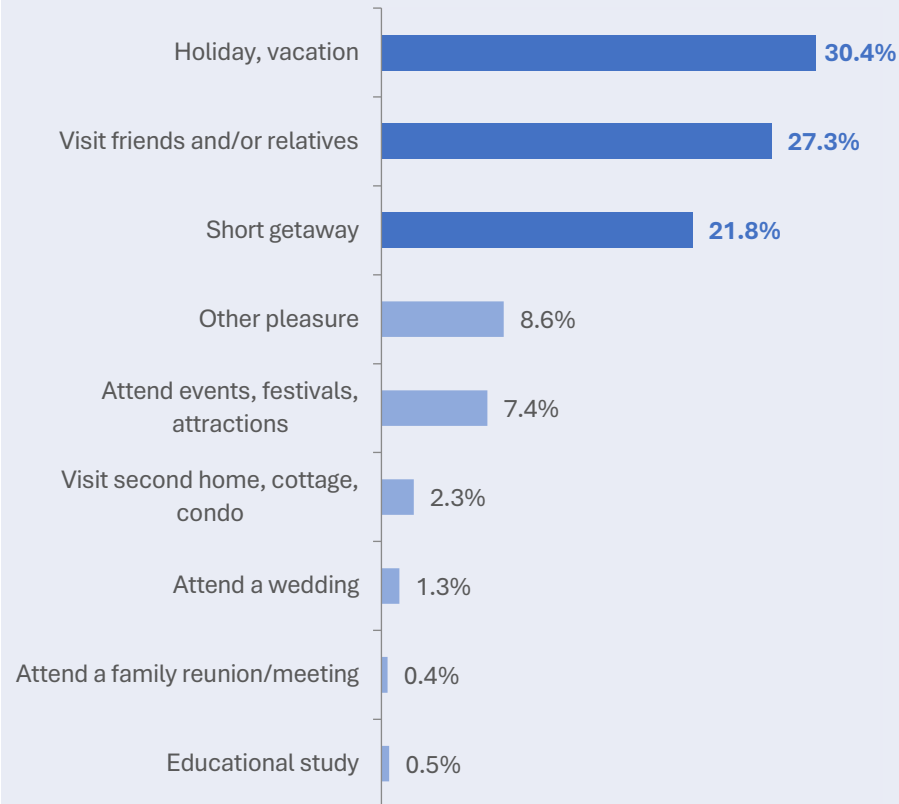


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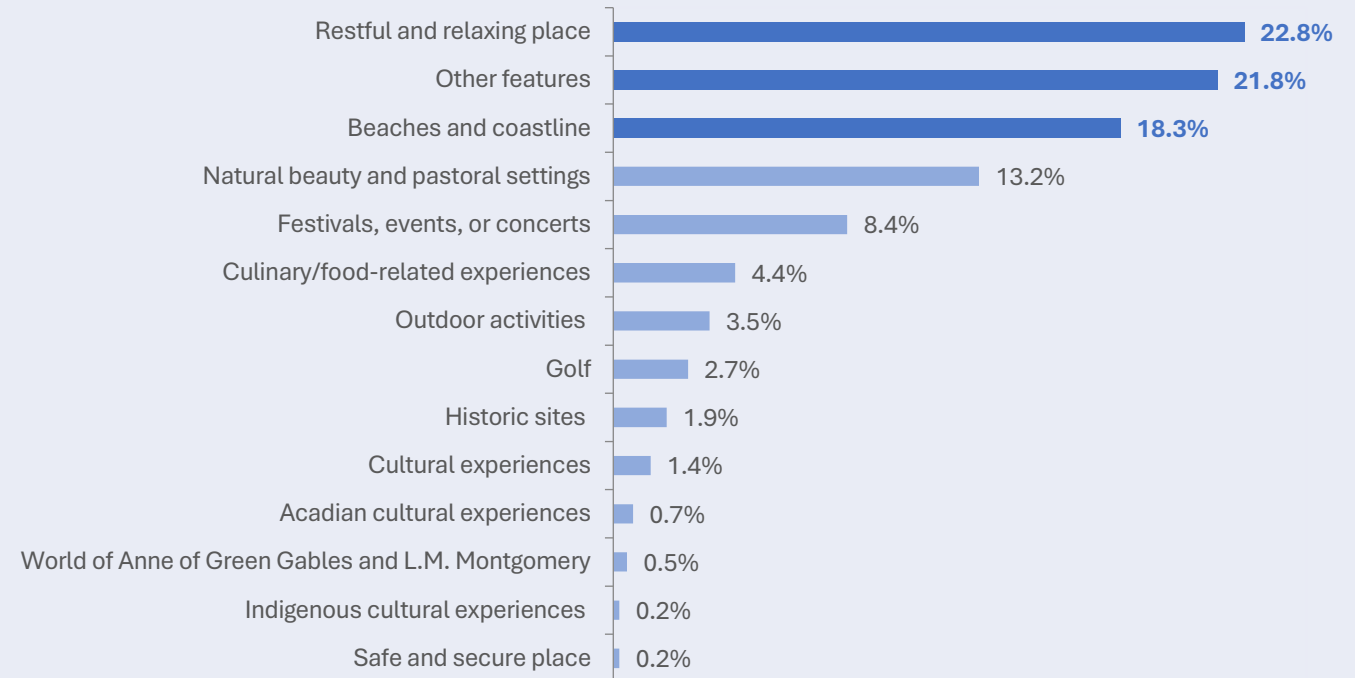


Why Visitors Come

Trip Purpose



Primary Features that Attracted



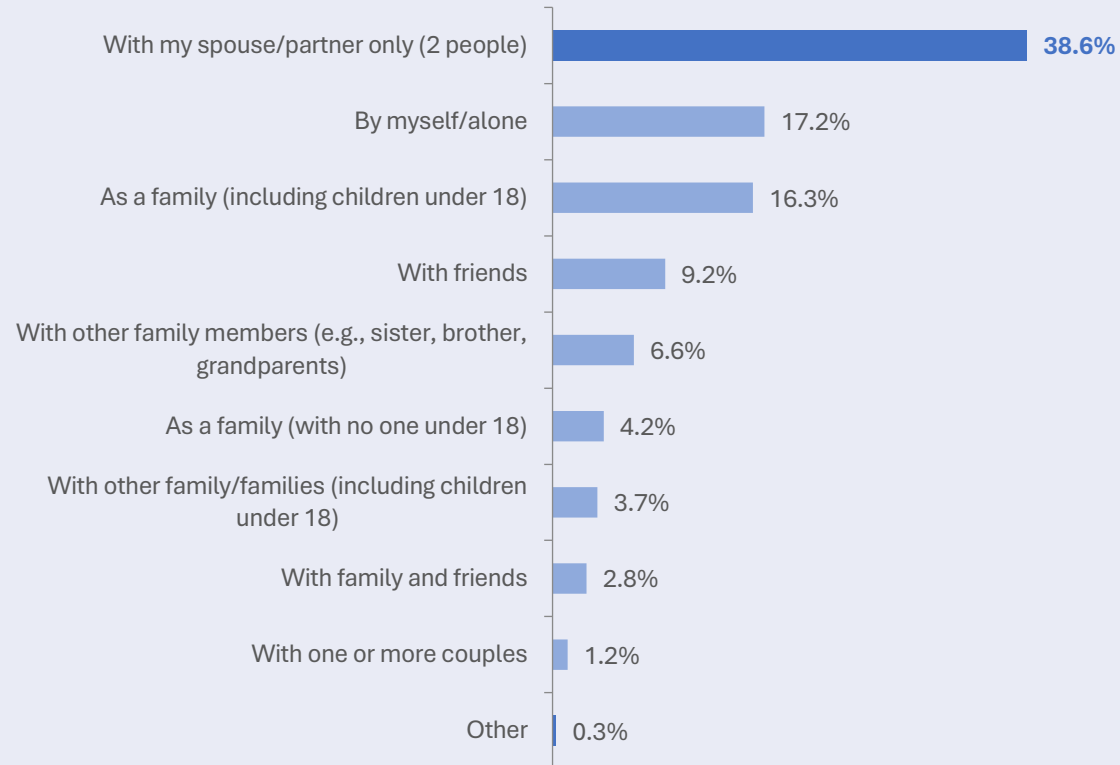


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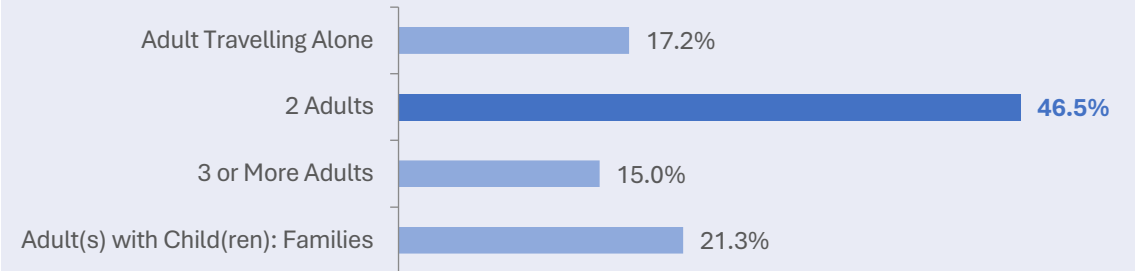


Who Visits PEI

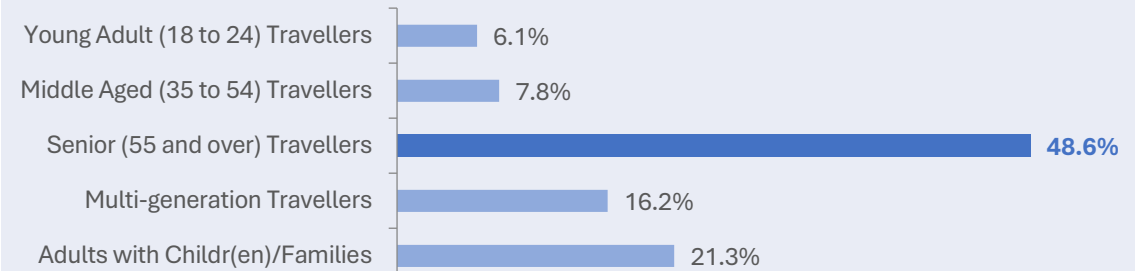
Party Characteristics



Party Composition



Age Composition



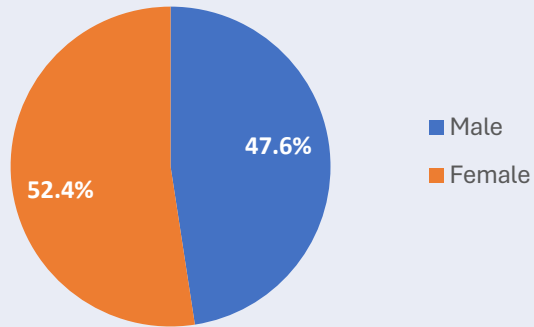


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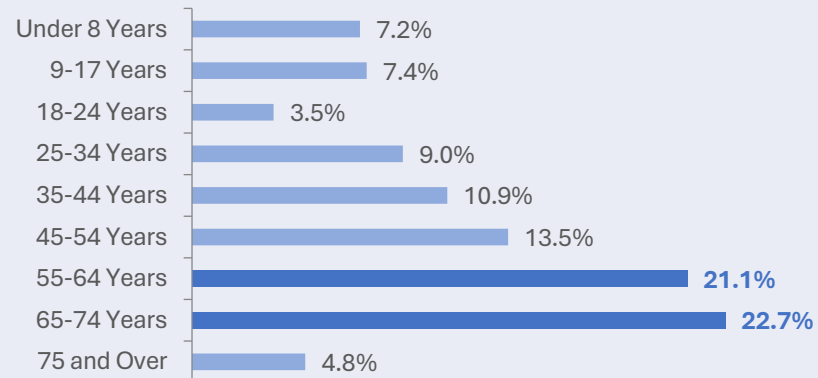


Who Visits PEI (cont'd)

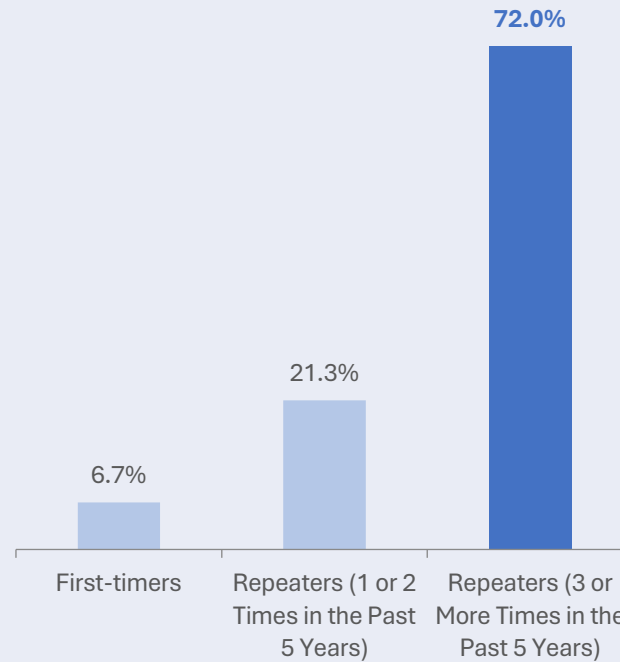
Gender of Individual Travellers



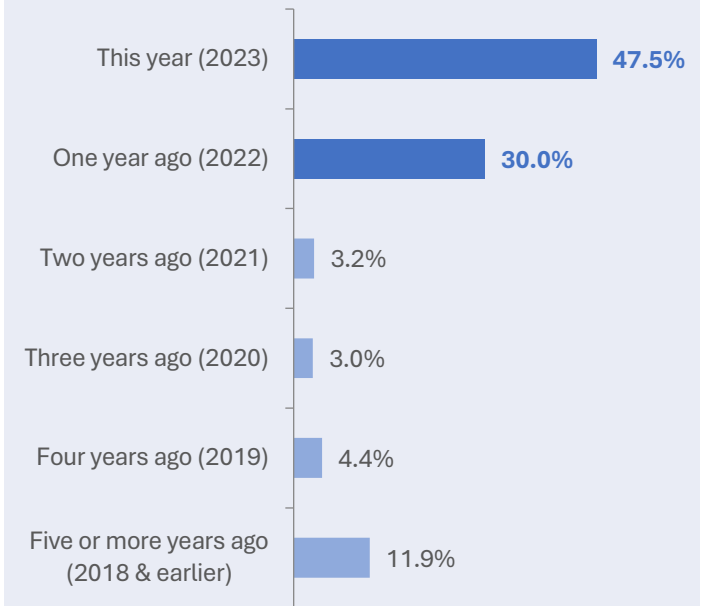
Age of Individual Travellers



Type of Visitation



Repeat Visit Pattern
(Average Number of Times Visited PEI in the Past Five Years = 6.04 times)



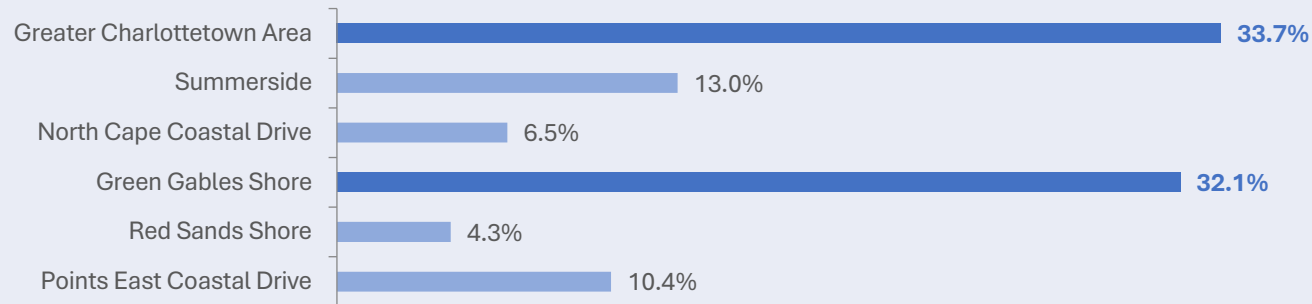


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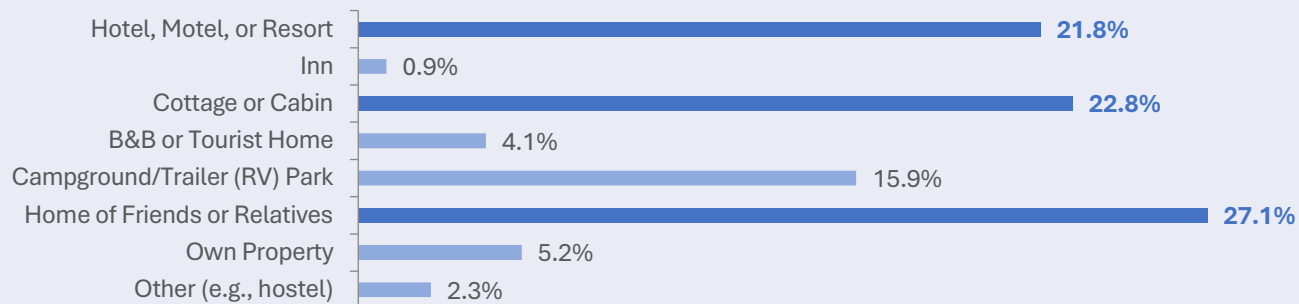


Where Visitors Stay

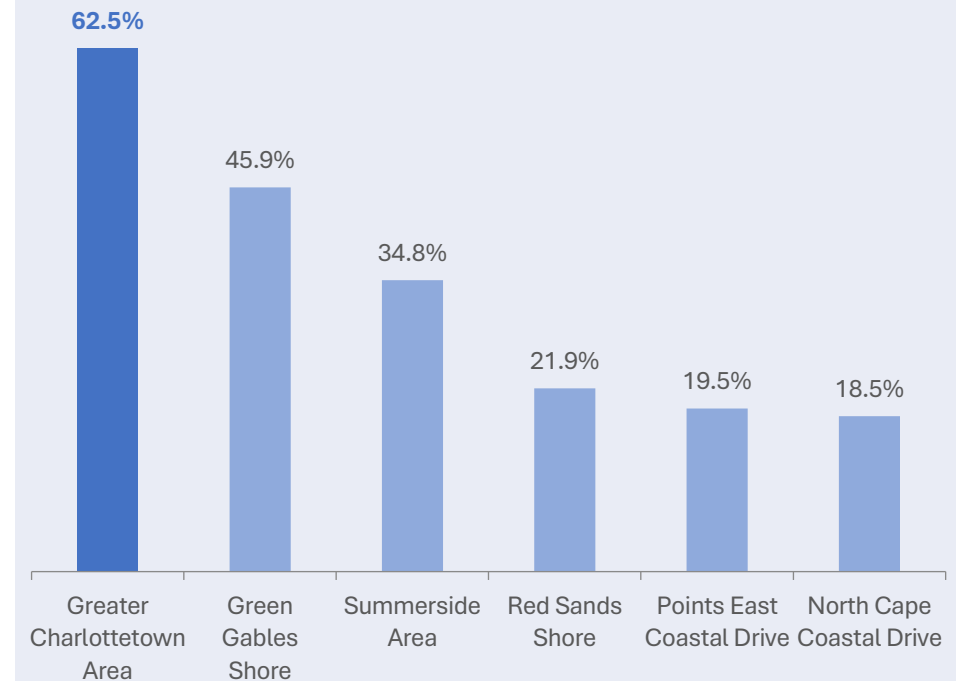
Overnight Stays in PEI Region (Percent based on Total Nights Stayed)



Overnight Stays in Type of Accommodation (Percent based on Total Nights Stayed)



PEI Regions Visited



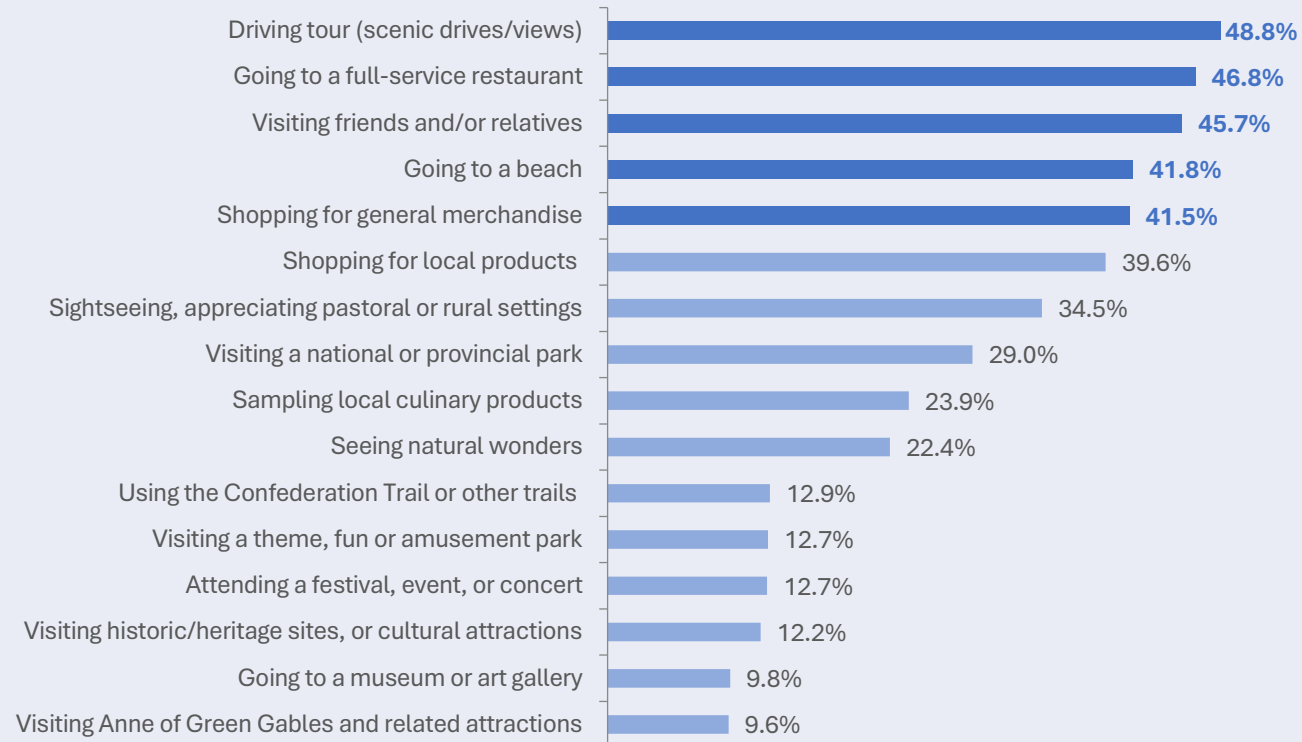


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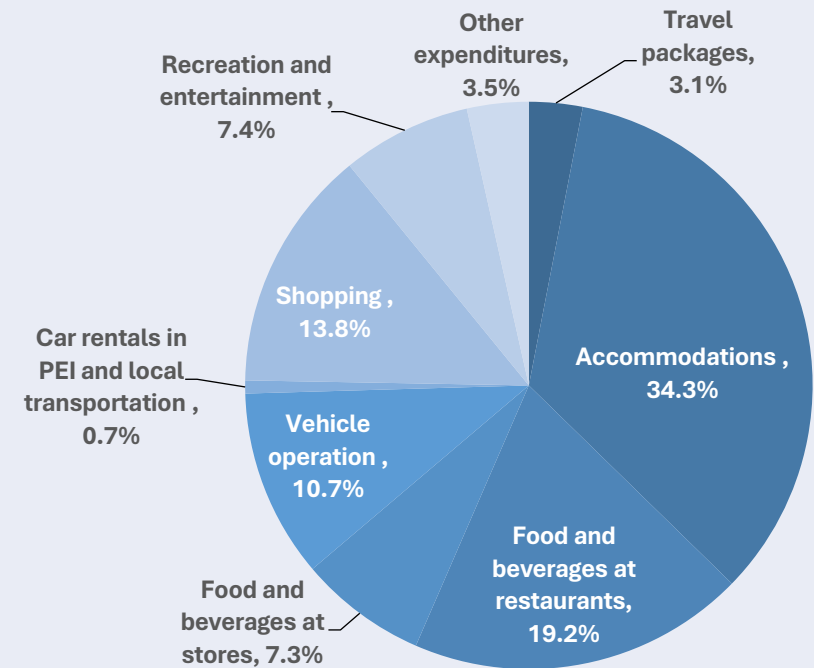
What Visitors Do

Top Activities Participated in



What Visitors Spend

Distribution of Travel Expenditures (Total Direct Expenditures = \$158.8 million)



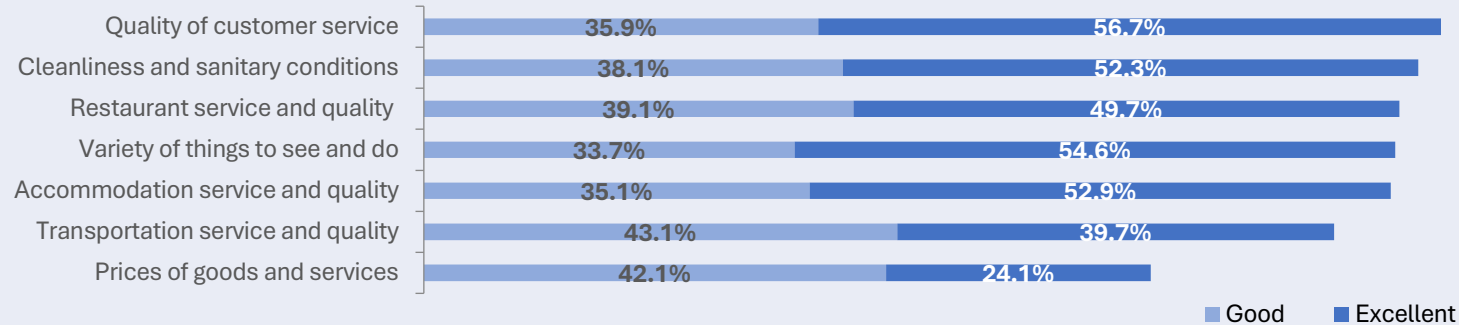


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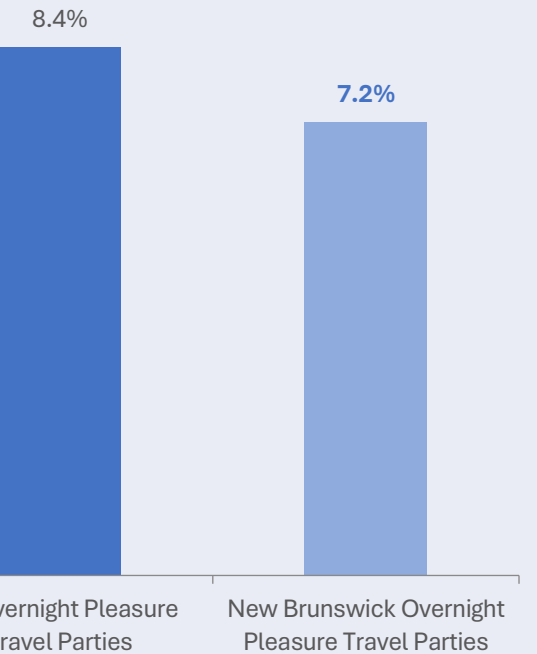


How PEI Rates

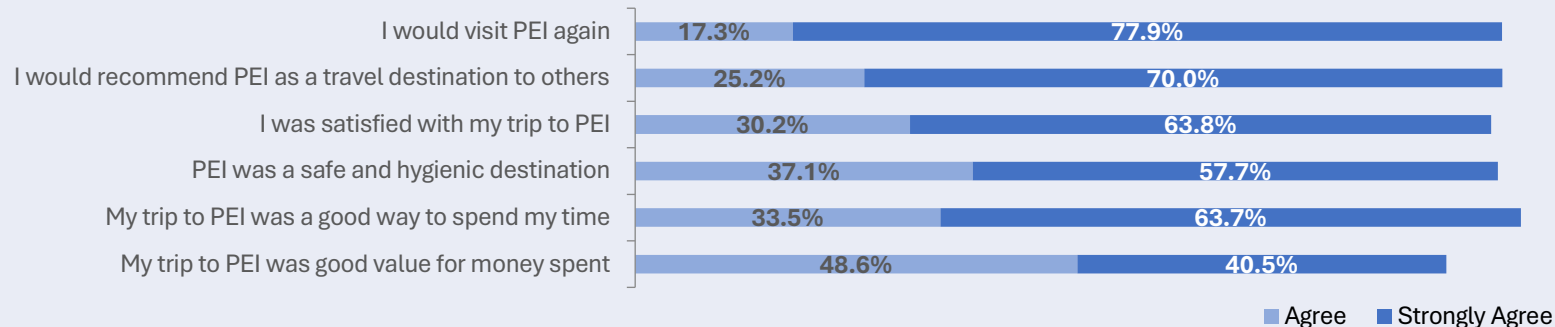
Rating of Travel Services and Quality



Instance of Complaints



Travel Evaluation and Behavioural Intentions





Market Suggestions

Are Visitors from NB Royal Customers?

- ☐ Of all overnight pleasure travel parties to PEI, 58 percent were from the Maritime provinces (New Brunswick; 32% and Nova Scotia; 26%). Based on these statistics, it suggests that PEI is doing well in the regional market (neighbouring provinces) for tourists.
- ☐ PEI is not only capturing share; it is locking it in as a repeat market. In fact, more than 80 percent of these overnight pleasure travellers (Maritime provinces) could be termed ***“regular clientele”*** - they return at least every second year.
- ☐ It could also mean that NB as a travel market for PEI consists of a group of regulars: those who come every year, in some cases multiple times, or every second year.
- ☐ However, PEI may not be attracting a sizeable group of new visitors from NB; i.e., those who have never been to PEI or have not been to PEI in the past five plus years. NB visitors to PEI can be considered ***“regular royal customers,”*** that is, the type of tourists who tend to return to the same places.





Market Suggestions *(cont'd)*

The Visiting Family and Friends (VFRs) Issue

- ❑ When asked for the main reason for travelling to PEI, approximately 27 percent of NB overnight pleasure parties indicated that they travelled to PEI primarily to visit friends and/or relatives (VFRs). Notably, this percentage of NB overnight VFRs is significantly higher during the winter months, ranging from 50 to 67 percent.
- ❑ This indicates that NB visitors to PEI include a significant amount of ***“regular VFR related customers.”*** This implies that, given the size of the NB VFR market and repeat visit patterns, this market composition is important to consider when developing PEI’s tourism strategy for the NB market, or when creating and implementing specific tourism promotions and advertising.
- ❑ Furthermore, this market composition such as VFRs is a particularly useful component in conjunction with others (e.g., winter regional sports tournament markets, winter concerts, events, related markets, etc.) as a tourism strategy for the winter off-season in PEI.





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Market Suggestions *(cont'd)*

Perception of PEI as a Travel Destination Issue

- ☐ Unlike other geographical travel markets for PEI, NB overnight pleasure travellers indicated that they are primarily attracted to PEI for its ***'restful and relaxing place' (23%)*** and ***'other features' (22%)***.
- ☐ Notably, the majority of items specified in the 'other features' were VFR-related, including reunions, funerals, weddings, former residents visiting their home province, and sports tournaments.
- ☐ This, again, indicates that NB visitors to PEI have a different perception or knowledge of PEI than those who are from other geographical areas because they may be familiar with PEI as a travel destination and NB is geographically close to PEI.





Market Suggestions *(cont'd)*

Aspects of Travel Behaviour Issue

- ☐ NB overnight pleasure travellers engaged in non-VFR-related activities **at lower levels** than visitors from other places (except Nova Scotia). This includes driving tours (scenic drives/views), going to a full-service restaurant, going to a beach, shopping for local products, sightseeing, appreciating pastoral or rural settings, visiting a national or provincial park, sampling local culinary products, seeing natural wonders, visiting historic/heritage sites, or cultural attractions, visiting Anne of Green Gables and related attractions, and using the Confederation Trail or other trails.
- ☐ For some, this may be due to summer vacation being part of a Maritime family tradition – a guaranteed, familiar good time. For others, this may be an issue of insufficient time or money to go elsewhere, or a desire to travel the short distance to PEI to perhaps visit a theme park or attend a festival or event. Overall, these are not travellers who are interested in visiting new destinations on a yearly basis.
- ☐ This suggests that PEI should adopt a differentiation strategy in its travel marketing to places, such as NB, by focusing on travellers' benefits, preferences, and favourability.





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Market Suggestions *(cont'd)*

How can PEI Attract more NB Visitors to PEI?

- ☐ Future directions towards a differentiation strategy may include researching the neighbouring market (including NB and NS) in relation to VFR-related travel to the Island, short getaway to PEI, and festivals/events related trip to PEI, and then developing a marketing plan that appeals to these groups of Maritime visitors to PEI.