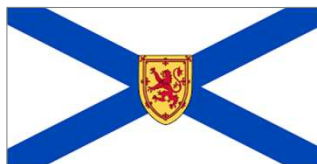


EXIT SURVEY REPORT SERIES: ES2023-14



NOVA SCOTIA

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

Prepared by:

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Department of Fisheries, Tourism, Sport and Culture

May 1, 2025

Prince Edward Island
CANADA
OFFICIAL TRAVEL DESTINATION OF THE NHL®



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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), ***Nova Scotia (NS) was Prince Edward Island (PEI)'s 2nd largest geographical travel market*** in terms of visitor arrivals and ***3rd largest market*** in overnight stays (total number of nights stayed) in PEI in 2023.
- ❑ These represent an estimated 384,100 individual visitors (26%) or 145,100 parties (26%) to PEI and 455,700 nights stayed (23%) in PEI. Of these, approximately 46 percent visited PEI during the July-August summer main season.
- ❑ Focusing on ***NS overnight pleasure travellers to PEI***, the number of individual overnight pleasure travellers accounted for 318,300 travellers (27%) or 108,300 parties (26%) and their overnight stays accounted for 424,200 nights (22%).
- ❑ The ***average party size*** and ***average trip duration*** for NS overnight pleasure travel parties were 2.94 persons and 3.92 nights, respectively.
- ❑ ***Total direct expenditures*** by NS overnight pleasure travel parties were estimated at approximately \$174 million.
- ❑ NS overnight pleasure travellers spent an average of \$1,607 *per party per visit* and \$140 *per person per night* on PEI.





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Market Overview *(cont'd)*

- ❑ Regarding **entry and exit points** when travelling to PEI, approximately 74 percent of NS overnight pleasure travel parties entered and exited PEI via the Confederation Bridge, 14 percent used a combination of the bridge and ferry, and 12 percent used the ferry service between PEI and Nova Scotia to enter and exit the province.
- ❑ With respect to **the trip purpose**, approximately 30 percent of NS overnight pleasure travel parties indicated that they travelled to PEI for a holiday or vacation, 28 percent travelled to PEI primarily to visit friends and/or relatives, and 21 percent travelled to PEI for a short getaway.
- ❑ In terms of **primary features that attracted** NS overnight pleasure travel parties to PEI, more than 23 percent were attracted by 'other features,' approximately 17 percent were attracted by 'beaches and coastline,' 17 percent of parties were attracted to PEI by 'restful and relaxing place,' 13 percent were attracted by 'natural beauty and pastoral settings,' and ten percent were attracted by 'festivals, events, or concerts.'
- ❑ Looking at **travel party characteristics**, approximately 41 percent of NS overnight pleasure travel parties travelled with their spouse/partner (two people), 17 percent travelled to PEI as a family (including children under 18), and 14 percent were single travellers.





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Market Overview *(cont'd)*

- ❑ In terms of *party composition*, the majority (78%) of NS overnight travel parties were comprised of only adults.
- ❑ Regarding *age composition* of NS overnight pleasure travel parties, 47 percent of parties were comprised of adults aged 55 and over (senior travellers), nine percent were between the ages of 35 and 54 (middle aged travellers), and seven percent were comprised of young adult travellers (aged 18 to 34).
- ❑ While approximately 23 percent of NS overnight pleasure travel parties were families (adults with children), 14 percent of overnight pleasure travel parties were comprised of travellers of varying age generations.
- ❑ Focusing on *individual NS overnight pleasure travellers to PEI*, overnight visitors were comprised of more females than males (51% versus 49%). Approximately 46 percent of NS overnight pleasure travellers were aged 55 and over, 27 percent were aged between 18 and 54, and 16 percent were aged 18 and under.
- ❑ Looking at *type of visitation to PEI and repeat visit pattern*, the vast majority (95%) of NS overnight pleasure travel parties had previously visited PEI. The majority of these parties had last visited PEI recently: 38 percent had last visited earlier in the same year of the trip in which they were surveyed, and 33 percent had last visited one year ago.





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Market Overview *(cont'd)*

- ❑ On average, NS repeat overnight pleasure travellers had visited PEI more than five times in the past five years, suggesting annual visits for some parties.
- ❑ According to the result of *total accumulated nights spent by NS parties in the specific region in PEI*, the most popular tourism regions were the Green Gables Shore region and the Greater Charlottetown Area. Approximately 35 percent of nights stayed were spent in the Green Gables Shore region and 31 percent were spent in the Greater Charlottetown Area.
- ❑ NS 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 NS travel parties, the most popular types of accommodation were home of friends or relatives (27%), cottage or cabin (25%), and hotel, motel or resort (20%).
- ❑ Regarding *PEI regions visited* while NS overnight pleasure travel parties were on PEI, the Greater Charlottetown Area (64%) was the most popular region, followed by the Green Gables Shore region (47%), the Points East Coastal Drive region (29%), Summerside Area (29%), the Red Sands Shore region (20%), and the North Cape Coastal Drive region (15%). 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.





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Market Overview *(cont'd)*

- ❑ NS overnight pleasure travel parties participated in a variety of **travel activities** while they were on PEI. Going to a full-service restaurant (55%), driving tour (scenic drives/views) (50%), visiting friends and/or relatives (47%), going to a beach (45%), shopping for local products (42%), and shopping for general merchandise (41%) were the most popular activities among NS overnight pleasure travel parties.
- ❑ **Other popular activities** engaged in by NS overnight pleasure travel parties include sightseeing, appreciating pastoral or rural settings (32%), visiting a national or provincial park (29%), sampling local culinary products (29%), and seeing natural wonders (20%).
- ❑ **Total direct expenditures** by NS overnight pleasure travel parties were estimated at approximately \$174 million. The items that accounted for the greatest proportion of total direct expenditures were accommodations (\$67.0 million; 39%), followed by food and beverage at restaurants, bars, hotels (\$30.4 million; 18%), shopping (\$18.3 million; 11%), vehicle operation (\$16.9 million; 10%), food and beverage at stores (\$12.5 million; 7%), recreation and entertainment (\$12.2 million; 7%), other expenses (\$8.1 million; 5%), travel package (\$7.9 million; 5%), and car rental and local transportation (\$0.7 million; 0.4%).





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Market Overview *(cont'd)*

- ☐ Visitors were asked to rank **PEI travel services, their trip evaluation, overall satisfaction, and future behavioural intention**.
- ☐ NS Overnight pleasure travel parties were pleased with aspects of their trip to PEI including restaurant services and quality (91%), the quality of customer service (91%), cleanliness and sanitary conditions (90%), variety of things to see and do (88%), accommodation service and quality (86%), transportation service and quality (86%), and prices of goods and services (67%).
- ☐ In terms of **complaints about their trip to PEI**, eleven percent of NS overnight pleasure travel parties indicated they experienced a problem or had a complaint about their trip to PEI, which was significantly higher than that of all overnight pleasure travel parties (8%).
- ☐ Despite the complaints regarding prices and taxes, 86 percent of NS overnight pleasure travel parties agreed that their trip to PEI was good value for money spent. Further, more than 95 percent of parties agreed that their trip to PEI was a good way to spend their time and they were satisfied with their trip to PEI.
- ☐ With respect to **future behavioural intentions**, the vast majority of NS overnight travel parties indicated that they would recommend PEI as a travel destination to others (95%) and they would visit PEI again (96%).



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Market Profile

Total Nova Scotia
Visitors to PEI in 2023

384,100

person arrivals

NS Overnight Pleasure
Travellers

318,300

person arrivals

NS Overnight Pleasure
Travel Parties

108,300

party arrivals

Average Party Size for NS
Overnight Pleasure
Travellers

2.94

persons

Total Overnight Stays in
PEI by NS Overnight
Pleasure Travellers

424,200

nights

Average Trip Duration in
PEI by NS Overnight
Pleasure Travellers

3.92

nights

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

2.57

nights

Estimated Total Direct
Expenditures in PEI by NS
Overnight Pleasure
Travellers

\$174.0

million

Average Spending by NS
Overnight Pleasure
Travellers

\$139.59

per person per night

Average Spending by NS
Overnight Pleasure
Travellers

\$1,606.54

per party per visit



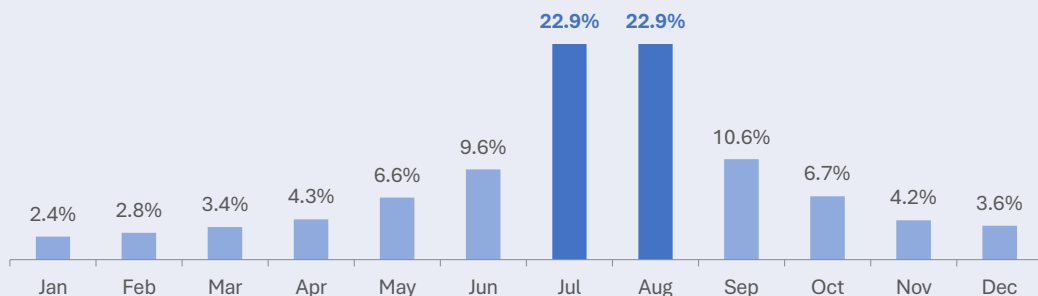


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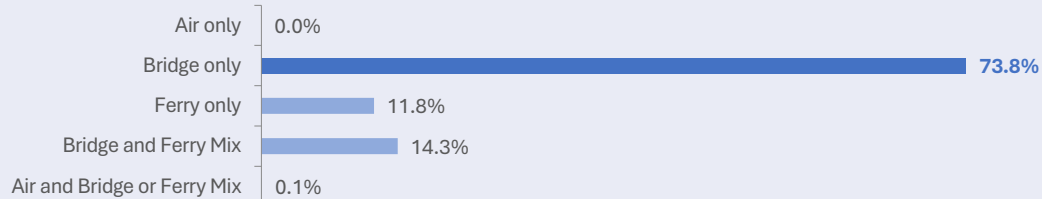


When Visitors Come and How Visits PEI

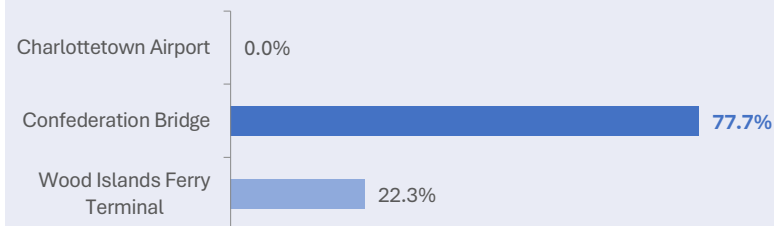
Month of Visit by NS Residents in 2023



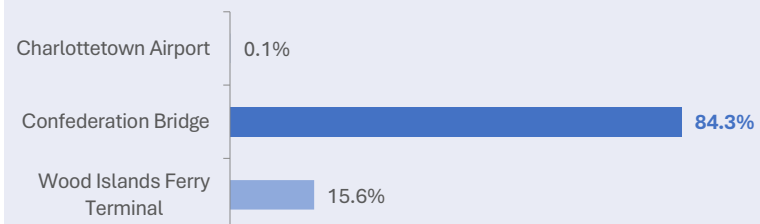
Mix of Entry and Exit Points



Entry Point



Exit Point



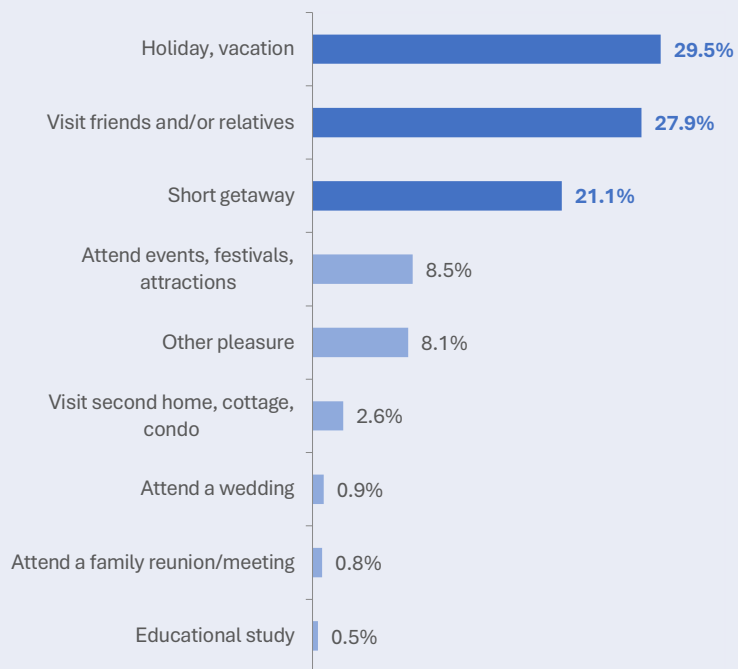


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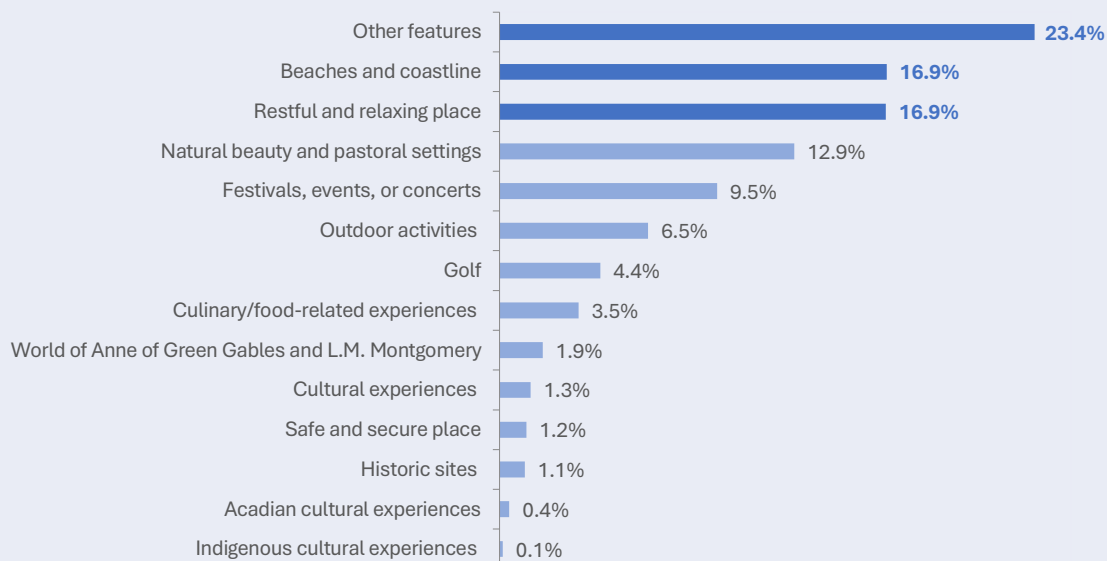


Why Visitors Come

Trip Purpose



Primary Features that Attracted



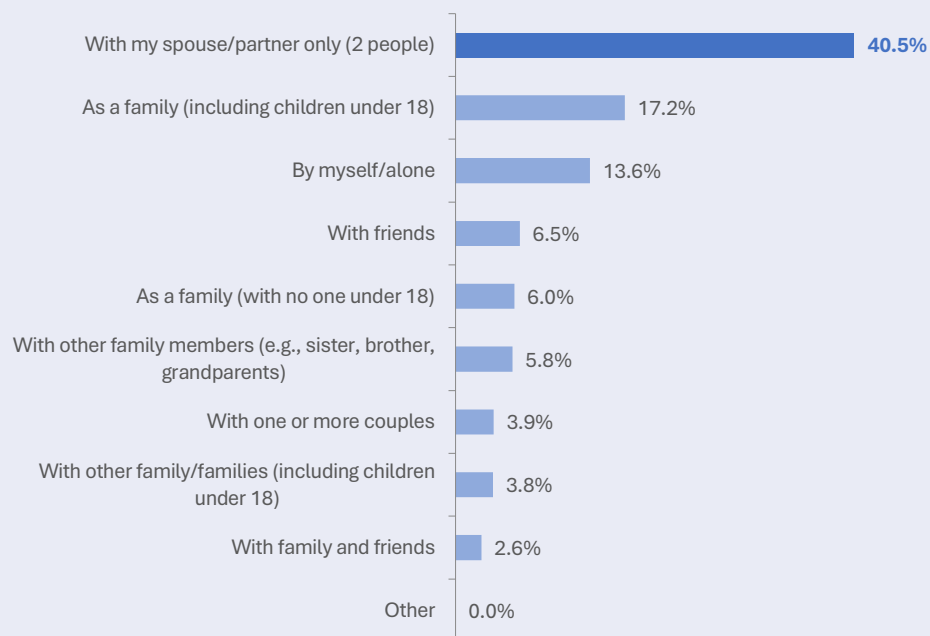


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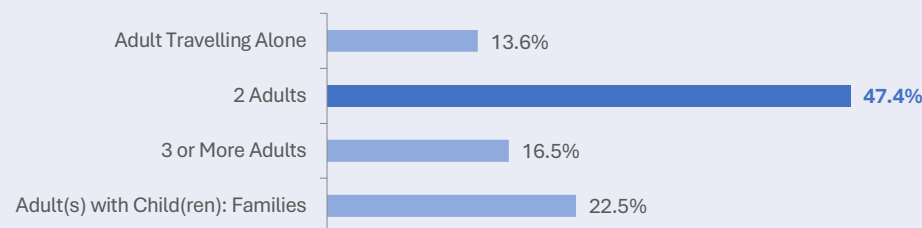


Who Visits PEI

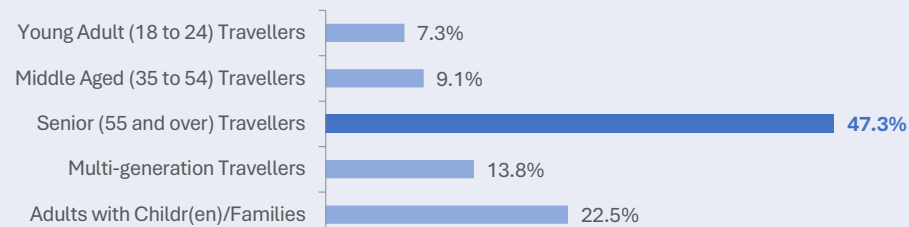
Party Characteristics



Party Composition



Age Composition



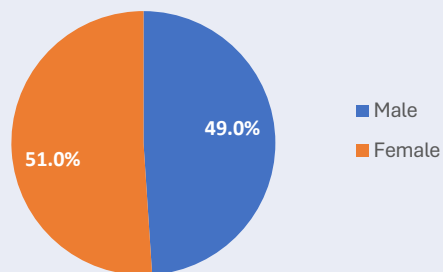


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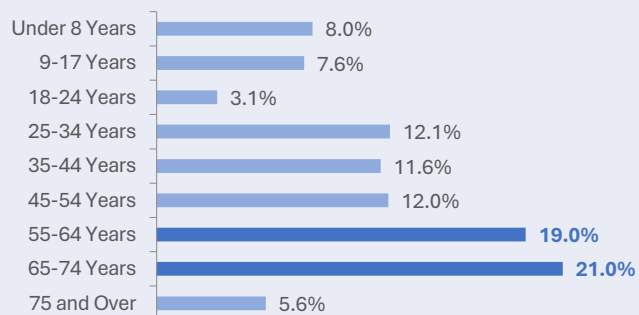


Who Visits PEI (cont'd)

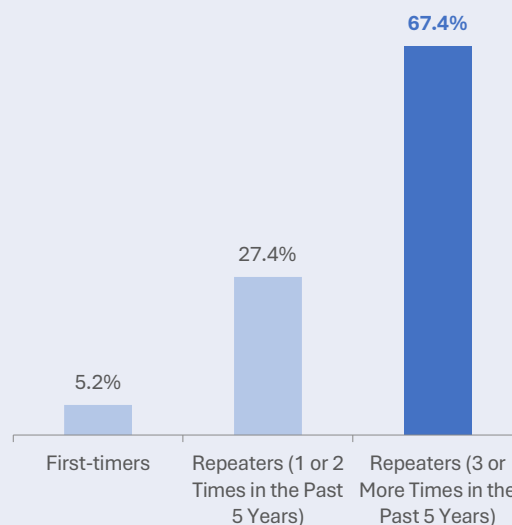
Gender of Individual Travellers



Age of Individual Travellers

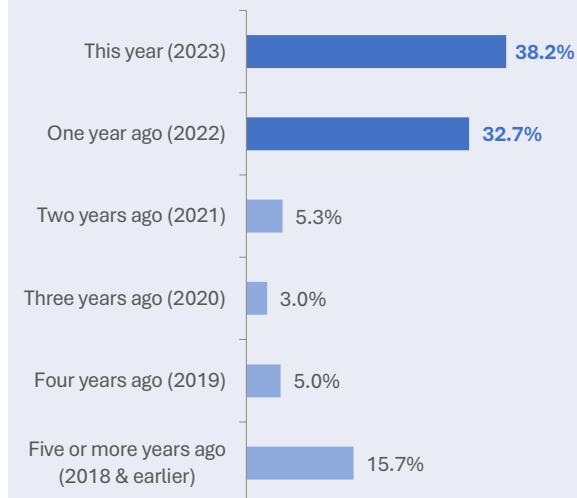


Type of Visitation



Repeat Visit Pattern

(Average Number of Times Visited PEI in the Past Five Years = 5.54 times)



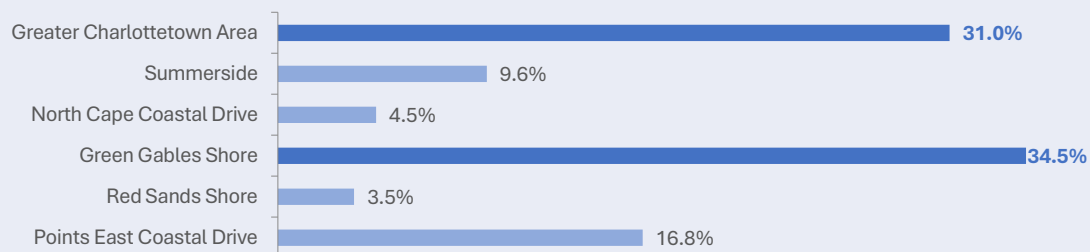


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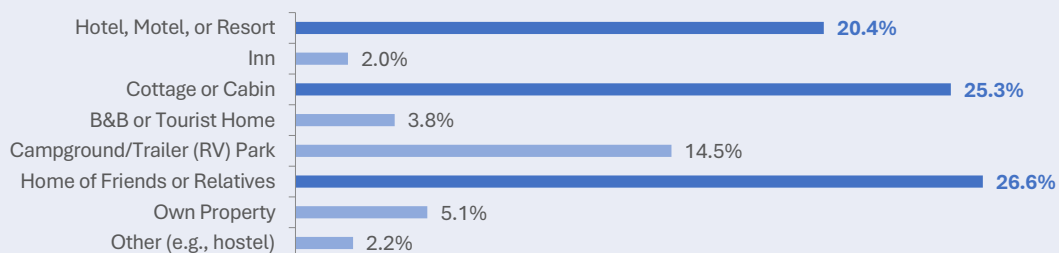


Where Visitors Stay

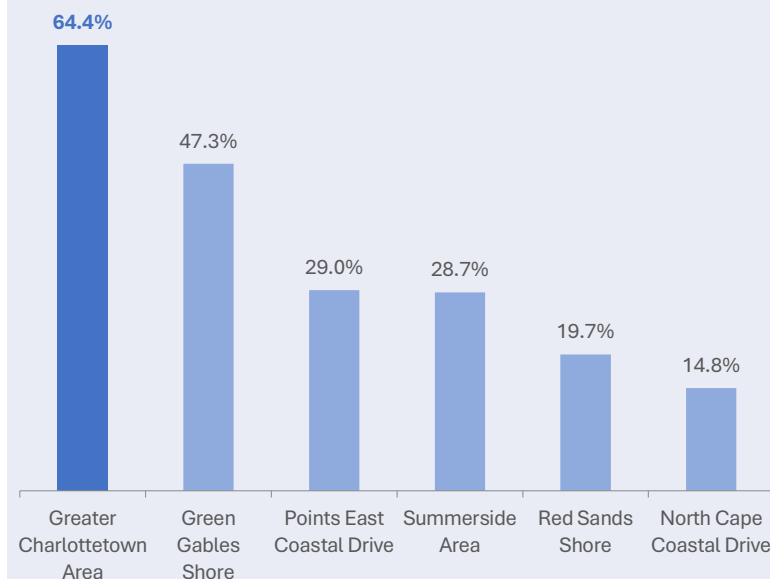
Overnight Stays in PEI Region (Percent based on Total Nights Stayed)



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



PEI Regions Visited



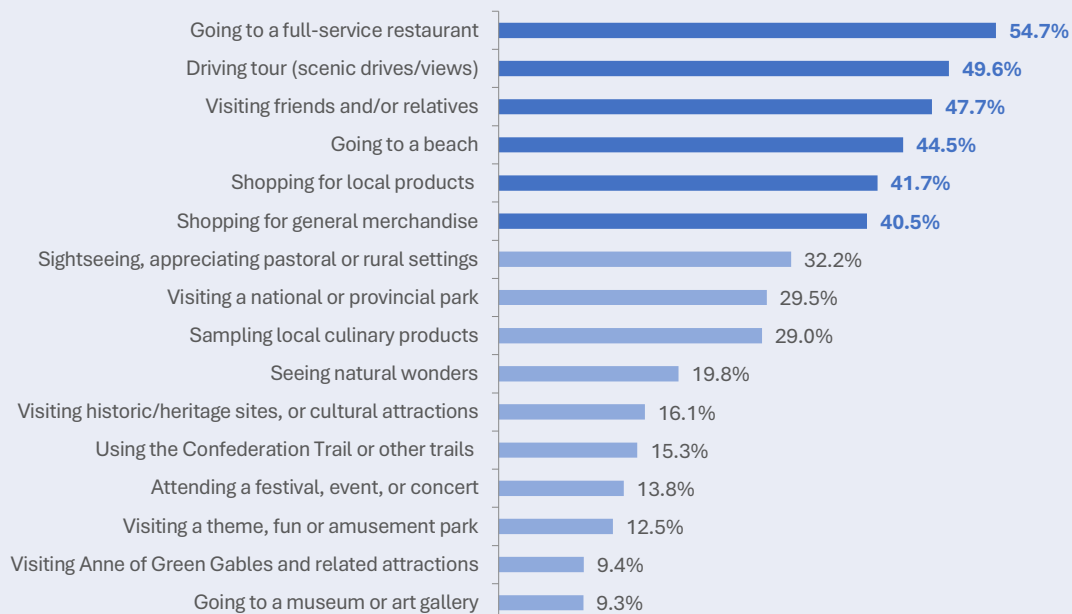


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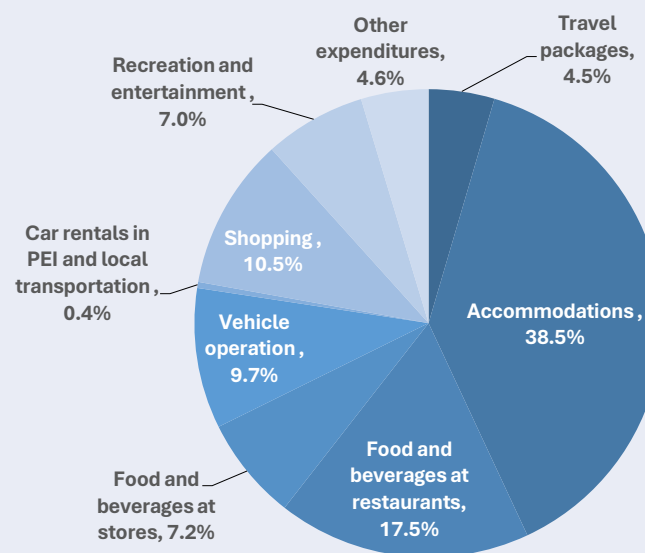
What Visitors Do

Top Activities Participated in



What Visitors Spend

Distribution of Travel Expenditures
(Total Direct Expenditures = \$174.0 million)



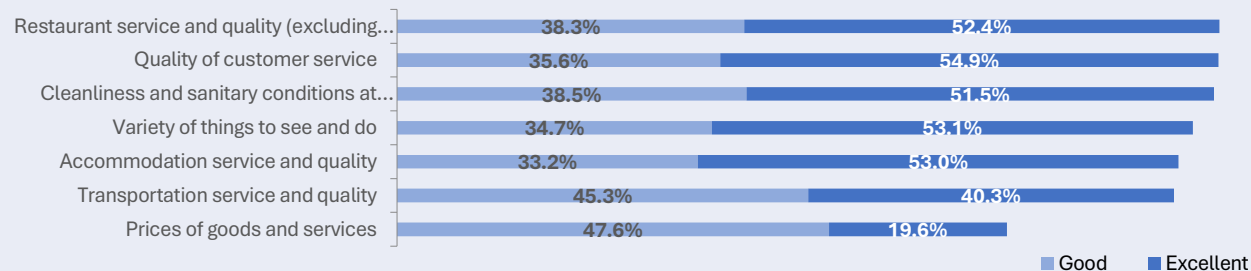


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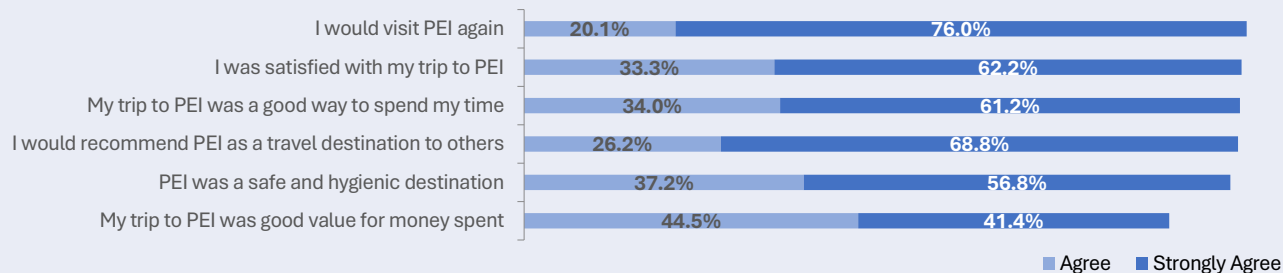


How PEI Rates

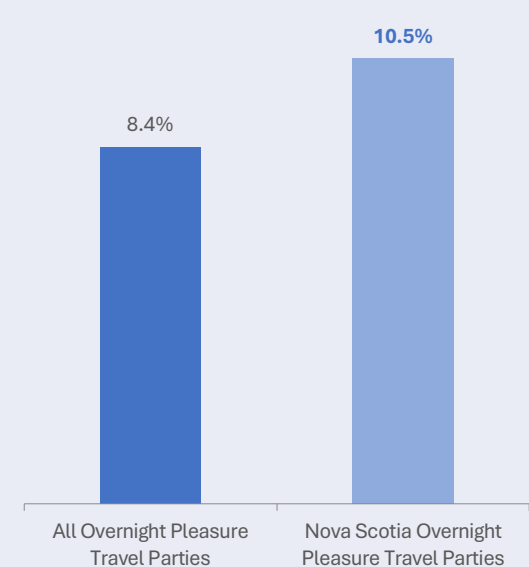
Rating of Travel Services and Quality



Travel Evaluation and Behavioural Intentions



Instance of Complaints





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Market Suggestions

Are Visitors from NS 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 NS 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 like the NB market.
- ☐ However, PEI may not be attracting a sizeable group of new visitors from NS; i.e., those who have never been to PEI or have not been to PEI in the past five plus years. NS visitors to PEI can be considered *“regular royal customers,”* that is, the type of tourists who tend to return to the same places.



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Market Suggestions *(cont'd)*

The Visiting Family and Friends (VFRs) Issue

- ☐ When asked for the main reason for travelling to PEI, approximately 28 percent of NS overnight pleasure parties indicated that they travelled to PEI primarily to visit friends and/or relatives (VFRs). Notably, this percentage of NS overnight VFRs is significantly higher during the winter months, ranging from 42 to 69 percent.
- ☐ This indicates that NS visitors to PEI include a significant amount of *“regular VFR related customers.”* This implies that, given the size of the NS VFR market and repeat visit patterns, this market composition is important to consider when developing PEI’s tourism strategy for the NS 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, NS overnight pleasure travellers indicated that they are primarily attracted to PEI for its **'other features' (23%)**, **'beaches and coastline' (17%)**, and **'restful and relaxing place' (17%)**.
- ☐ 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 NS 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 NS is geographically close to PEI.
- ☐ This is an important observation and reaffirms that PEI should do more to shore up awareness of strengths of its travel products and services.
- ☐ The finding suggest that PEI must be prepared to differentiate its range of travel experiences and services to appeal and attract more specific markets like NS and NB.





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Market Suggestions *(cont'd)*

Aspects of Travel Behaviour Issue

- ☐ Like NB visitors, NS overnight pleasure travellers engaged in non-VFR-related activities *at lower levels* than visitors from other places (except New Brunswick). 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, using the Confederation Trail or other trails, going to a museum or art gallery, and so on.
- ☐ 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 NS and NB, by focusing on travellers' benefits, preferences, and favourability.





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Market Suggestions *(cont'd)*

How can PEI Attract more NS Visitors to PEI?

- ☐ Future directions towards a differentiation strategy may include researching the neighbouring market (including NS and NB) 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.