

EXIT SURVEY REPORT SERIES: ES2023-24



# A PROFILE OF CULTURAL TOURISM IN PRINCE EDWARD ISLAND: RESULTS FROM THE 2023 EXIT SURVEY

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Prince Edward Island  
CANADA  
OFFICIAL TRAVEL DESTINATION OF THE NHL®



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# EXECUTIVE SUMMARY

## *The Size of the Cultural Tourism Market in Prince Edward Island Accounts for More than Half of the Total Overnight Pleasure Travel Market.*

- A total of 565,428 visitor parties were estimated to have visited PEI in 2023 by way of the three exit points (excluding cruise travellers and motor coach tourists).
- Approximately 80 percent of these parties (451,379 parties) stayed at least one night on PEI, while the remaining 114,049 parties (20%) visited PEI for a day trip.
- Of these overnight visitor parties, 91 percent (411,488 parties) primarily visited PEI for pleasure purposes including other purposes such as attending a wedding, attending a family reunion, and so on.
- Of all overnight pleasure travel parties or individual travellers that visited PEI (411,488 parties or 1,168,657 travellers), **the market size related to “culture”** was found to account for **54.8 percent (225,290 parties)** or **58.1 percent (678,663 travellers)** by using the two questions below:
  - 1) “culture” related elements as the primary features that attracted to PEI and
  - 2) “culture” related items as the travel activity participated in while travelling in PEI.

## EXECUTIVE SUMMARY *(cont'd)*

- **Culture-oriented travel parties** indicate those who were primarily attracted by at least one of the cultural features that attracted to PEI **AND** participated in at least one of the culture related activities while travelling in PEI (parties  $n=52,442$ ; 12.7% or individual travellers  $n =142,425$ ; 12.2%).
- **Accidental cultural travel parties** indicate those who were **NOT** primarily attracted by at least one of the cultural features that attracted to PEI **BUT** participated in at least one of the culture related activities while travelling in PEI (parties  $n=172,848$  42.0% or individual travellers  $n =536,238$ ; 45.9%).

### *Cultural Tourism Market can be Considered the Invaluable Travel Market in Prince Edward Island.*

- The size of “culture-oriented travel market” is relatively smaller than “accidental cultural travel market.”
- **“Culture-oriented tourists”** spend more but they stay shorter.
- **“Accidental cultural Tourists”** stay longer but spend average.
- Therefore, **“culture-oriented tourism market”** in terms of average spending per person per night basis and **“accidental cultural Tourism Market”** based on average length of overnight stays can be considered the **“invaluable travel markets”** for Prince Edward Island.

## EXECUTIVE SUMMARY *(cont'd)*

### ***Cultural Travel Parties Not Only Spend More, But Also Stay Longer than Non-Cultural Tourists.***

- Cultural tourists tended to spend more (\$148.29 vs. \$130.48 per person per night basis) and stay longer (5.11 nights vs. 4.03 nights) than non-cultural tourists.
- In terms of total expenditures in PEI, it was estimated that cultural travel parties spent approximately \$514,600,000 while non-cultural travel parties spent around \$257,400,000.

### ***Festival, Events, or Concerts, Anne of Green Gables, and Historic Sites are Key Cultural Features that Attracted to Prince Edward Island.***

- Festival, events, or concerts attracted approximately 23,700 overnight pleasure parties to travel to PEI in 2023 (6% of all overnight pleasure travel parties).
- World of Anne of Green Gables and L.M. Montgomery attracted approximately 15,300 parties to visit PEI.
- Historic sites attracted approximately 6,600 parties to travel to PEI.

## EXECUTIVE SUMMARY *(cont'd)*

*Visiting Historic/Heritage Sites, or Cultural Attractions, Visiting Anne of Green Gables and/or Lucy Maud Montgomery Attractions, Going to a Museum or Art Gallery, Attending a Festival, Event, or Concert, and Attending a Live Performance/Entertainment, Visiting a Theme, Fun or Amusement Park are Key Culture-related Activities in Prince Edward Island.*

- Visiting historic/heritage sites, or cultural attractions (26%) appeared to be the most popular cultural activity.
- Visiting Anne of Green Gables and/or Lucy Maud Montgomery attractions (21%) ranked the second most favourable cultural activity, followed by going to a museum or art gallery (14%), attending a festival, event, or concert (13%), attending a live performance/entertainment (11%), visiting a theme, fun or amusement park (10%), and taking part in an authentic PEI experience/hands-on learning activity (4%).

## EXECUTIVE SUMMARY *(cont'd)*

### *Cultural Tourists are More Likely to be from the United States and Overseas.*

- Cultural travel parties were more likely to be from the United States (10% vs. 4%, respectively) and overseas (2.3% vs. 1.2%), compared to non-cultural travel parties.
- Looking at the Canadian market, cultural travel parties were more likely to be from farther distant provinces from PEI (Quebec: 12% vs. 8%, respectively; Ontario: 21% vs. 13% respectively; other provinces excluding Atlantic Canadian provinces: 6% vs. 2% respectively), compared to non-cultural travel parties.
- Although overnight pleasure travel parties from the Maritime provinces were more likely to be non-cultural travel parties (70% of non-cultural travel parties), **surprisingly**, approximately 48 percent of cultural travel parties were from Maritime provinces (25% from New Brunswick and 23% from Nova Scotia).
- Nonetheless of the geographical proximity, residents of NB and NS are likely to perceive that PEI's culture is different from theirs. ***This implies that PEI has a very large untapped neighbouring market, literally, "next door" specifically in terms of appealing to them with cultural elements of PEI.***

## EXECUTIVE SUMMARY *(cont'd)*

### ***Cultural Travel parties are More Likely to Travel with their Families (including children under 18), be First-time Visitors to PEI, and Travel to PEI for the Purpose of a Holiday or Vacation and Attending Events, Festivals, and Attractions.***

- Cultural tourists tended to travel with their family members (including children under 18) (27% vs. 16%), compared to non-cultural tourists.
- More cultural tourists were first-time visitors to PEI (31% vs. 12%).
- More cultural tourists were more likely to travel to PEI for the Purpose of a Holiday or Vacation (56% vs. 30%) and attending events, festivals, and attractions (9% vs. 1%).

### ***Cultural Tourists were Very Pleased with Aspects of their Trip to PEI and Very Satisfied with their Trip, and Highly Likely to Visit PEI Again.***

- Around ten percent of cultural tourists indicated they experienced a problem or had a complaint about their trip to PEI while seven percent of non-cultural tourists had a complaint .
- Despite the complaints, 96 percent of cultural tourists reported that they were satisfied with their trip to PEI while 93 percent indicated that they would visit PEI again.

## EXECUTIVE SUMMARY *(cont'd)*

***Cultural Tourists are More Likely to be Those Who are Aged between 35 and 54, Those Who have a Child 17 Years and Younger, Those Who have a Mother Tongue other than English, Those Who have a Post Graduate Degree, and Those Who are Working Full-time.***

- More cultural tourists were aged between 35 and 54 (31% vs. 24%) and had a child (or children) 17 years and younger (23% vs. 18%), compared to non-cultural tourists.
- More cultural tourists had mother tongue languages other than English (22% vs. 17%).
- More cultural tourists had a post graduate degree (28% vs. 23%).
- More cultural tourists were working full-time (46% vs. 40%).

# 1. INTRODUCTION

- **A visitor exit survey** is a tool used to profile visitors and estimate their impact on a destination. It can capture visitor demographics and trip characteristics such as travel party size and composition, the purpose of their trip, regions visited, length of stay, type of accommodation used, activities participated in, expenditures, and trip evaluation.
- This report presents data collected via the **2023 PEI Travel Survey of Visitors (Exit Survey)**, from January 1 to December 31, 2023, from only same-day visitors to PEI.
- The main purposes of this report were:
  - 1) To identify cultural tourism market (overnight pleasure travel parties or travellers) and
  - 2) To provide detailed characteristics of their trips **by cultural tourism markets**.
- In total, 14,055 surveys were collected. Among these, 10,340 surveys (73.6%) were used to analyze the data for the 2023 exit survey. Among these, 8,638 samples (83.5%) were overnight pleasure travel parties. For this report, **5,790 samples (41.2%)** were used, and these were overnight pleasure travel parties related cultural elements as the primary feature that attracted them to PEI and/or culture-related items as the travel activity participated in while travelling in PEI were used for this report.
- **This report provides a profile of overnight pleasure travel parties (travellers) by Cultural Tourism Markets.**

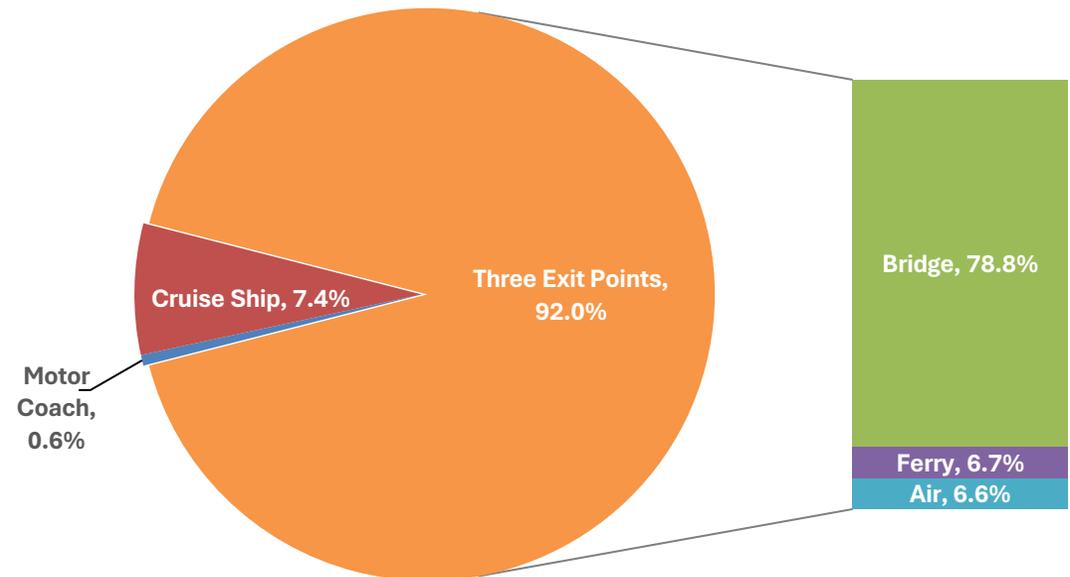
## 2. TRAVEL MARKET OVERVIEW IN 2023

### 2-1. Overview of Total Visitation in PEI

#### Highlights

- It was estimated that a total of approximately 1,615,500 *individual visitors* travelled to PEI during the period from January 1<sup>st</sup> to December 31<sup>st</sup>, 2023 (Figure 1).
- As shown in Figure 2, approximately 1,486,300 visitors (92%) exited PEI by way of the three exit points, excluding cruise travellers and motor coach tourists. These accounted for 565,400 *travel parties*.
- Of these, it was estimated that almost 80 percent (451,400 *parties*) stayed at least one night in PEI while 20 percent (114,000 *parties*) were same-day visitor parties (Figure 2)
- As presented in Figure 3, approximately 87 percent of those who stayed at least one night in PEI visited the province primarily for pleasure purposes (390,300 *parties*).

Figure 1: Total Visitation in 2023



Source: 2023 PEI Tourism Volume Model Estimation

## 2-2. Overall Market Situation in PEI

Figure 2: Total Travel Market in PEI (2023)  
(Total Visitor Parties N = 565,428)

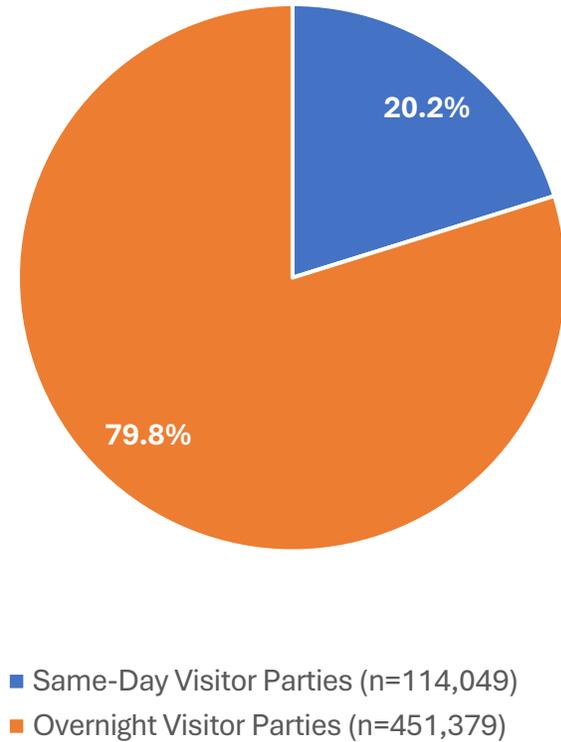
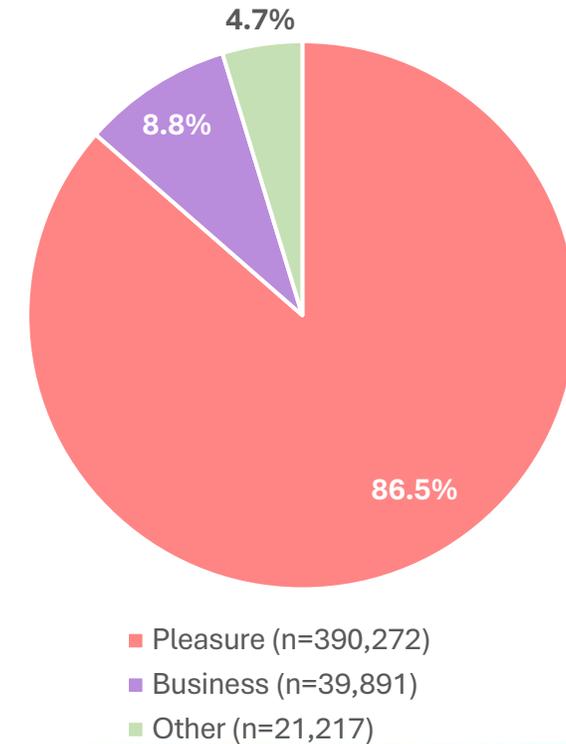


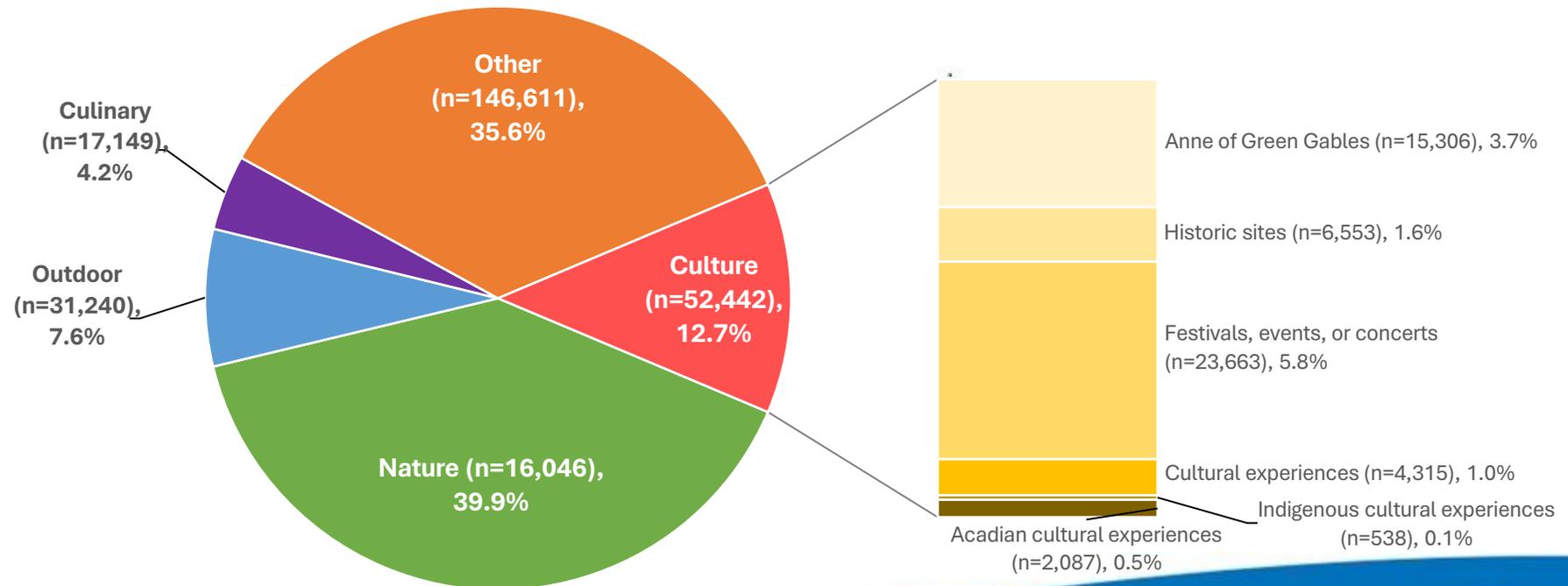
Figure 3: Overnight Travel Market in PEI (2023)  
(Total Overnight Parties N = 451,379)



### 3. MARKET INCIDENCE AND SIZE OF THE CULTURAL TOURISM IN PEI

#### 3-1. Market Incidence and Size of Cultural Tourism Market by Primary Feature that Attracted

Figure 4: Market Incidence and Size of Cultural Tourism Market by the Primary Feature in 2023



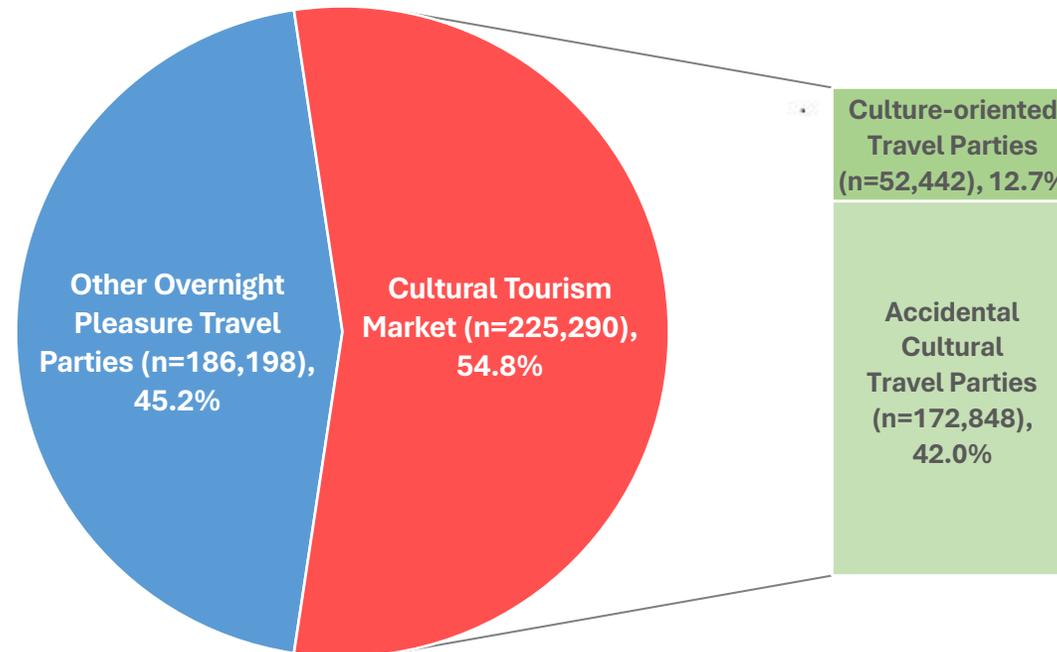
### 3-2. Market Incidence and Size of Cultural Tourism Market by Culture-related Activities Participated in

|   | Number of Overnight Pleasure Travel Parties | % of Total Overnight Pleasure Travel Parties |
|---|---|--|
| <b>MARKET SIZE OF CULTURE-BASED ACTIVITIES (NET)</b>                  | <b>225,290</b>                              | <b>54.7%</b>                                 |
| Visiting historic/heritage sites, or cultural attractions             | 106,721                                     | 25.9%  |
| Visiting Anne of Green Gables and/or Lucy Maud Montgomery attractions | 85,812                                      | 20.9%  |
| Going to a museum or art gallery                                      | 59,154                                      | 14.4%  |
| Attending a festival, event, or concert                               | 52,308                                      | 12.7%  |
| Attending a live performance/entertainment                            | 43,759                                      | 10.6%  |
| Visiting a theme, fun or amusement park                               | 42,140                                      | 10.2%  |
| Taking part in an authentic PEI experience/hands-on learning activity | 14,515                                      | 3.5%   |



### 3-3. Segmenting Cultural Tourism Market by A Mix of Primary Features that Attracted and Culture-related Activities Participated in

Figure 5: Segmenting Cultural Tourism Market in PEI in 2023

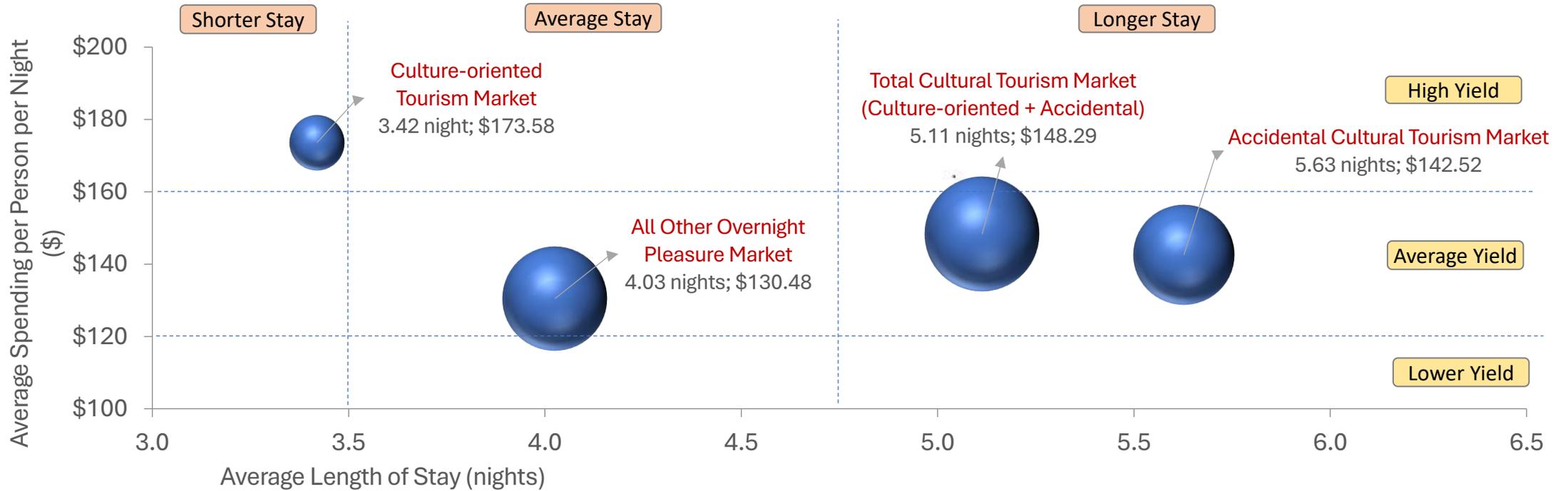


## Highlights

- As presented in Figure 5, of all overnight pleasure travel parties or individual travellers that visited PEI (411,488 parties or 1,168,657 travellers) in 2023, **the market size related to “culture”** was found to account for **54.8 percent (225,290 parties) of all overnight pleasure parties** or **58.1 percent (678,663 travellers) of all individual overnight pleasure travellers** by using the two questions below:
  - 1) “culture” related elements as the primary features that attracted to PEI and
  - 2) “culture” related items as the travel activity participated in while travelling in PEI.
- **Culture-oriented travel parties** indicates those who **were primarily attracted by** at least one of cultural features that attracted to PEI **AND** participated in at least one of culture related activities while travelling in PEI (parties  $n=52,442$ ; 12.7% or individual travellers  $n=142,425$ ; 12.2%).
- **Accidental cultural travel parties** indicates those who were **NOT** primarily attracted by at least one of cultural features that attracted to PEI **BUT** participated in at least one of culture related activities while travelling in PEI (parties  $n=172,848$  42.0% or individual travellers  $n=536,238$ ; 45.9%).
- ***This report provides a profile of cultural tourism market by these two markets: (1) Culture-oriented travel parties and (2) Accidental cultural travel parties.***

### 3-4. Identifying the Value of Cultural Tourism Market

Figure 6: The Value of Cultural Tourism Markets based on Market Size, Level of Yield, and Length of Stay



Note: **Culture-oriented travel parties** indicates those who **were primarily attracted by** at least one of cultural features that attracted to PEI **AND** participated in at least one of culture related activities while travelling in PEI (parties  $n=52,42$ ; 12.7% or individual travellers  $n=142,425$ ; 12.2%).

**Accidental cultural travel parties** indicates those who were **NOT** primarily attracted by at least one of cultural features that attracted to PEI **BUT** participated in at least one of culture related activities while travelling in PEI (parties  $n=172,848$ ; 42.0% or individual travellers  $n=536,238$ ; 45.9%).



## Highlights

- Figure 6 presents the overnight pleasure travel party segment by cultural tourism markets and other overnight pleasure market across the three dimensions:
  - 1) Market size based on number of parties estimated (relative size of the bubbles);
  - 2) Average length of stay in PEI; and
  - 3) Average spending per person per night.
- **The high-yield segment** (the highest average spending per person per night) includes “culture-oriented tourism market” (\$173.58) with average length of stays of 3.42 nights.
- **The average yield segment** consists of “cultural tourism market (total)” (\$148.29), “accidental cultural tourism market” (\$142.52), and “all other overnight pleasure market” (\$130.48) with average length of stays of 5.11, 5.63, and 4.03 nights, respectively.
- In PEI, the **cultural tourism market** was found to account for more than half of the total overnight pleasure market (54.8%). **“Culture-oriented Tourism Market”** in terms of average spending per person per night basis and **“Accidental Cultural Tourism Market”** based on average length of overnight stays can be considered the **“invaluable travel market”** for Prince Edward Island.
- **Total direct expenditures** by overnight pleasure travel parties related “cultural travel (total)” were estimated at **\$514.6 million** (culture-oriented = 84.5 million and accidental = \$430.1 million).

## 4. WHO VISITS PEI

### 4-1. Origin

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Canada</b>                           | 87.4%                           | 88.0%                              | <b>87.9%</b>                  |
| New Brunswick                           | <b>32.8%</b>                    | <b>23.0%</b>                       | <b>25.3%</b>                  |
| Nova Scotia                             | <b>29.7%</b>                    | <b>20.7%</b>                       | <b>22.8%</b>                  |
| Newfoundland and Labrador               | 1.0%                            | 1.1%                               | <b>1.1%</b>                   |
| Quebec                                  | <b>8.4%</b>                     | <b>13.5%</b>                       | <b>12.3%</b>                  |
| Ontario                                 | <b>10.7%</b>                    | <b>23.8%</b>                       | <b>20.7%</b>                  |
| Rest of Canada                          | 4.9%                            | 5.9%                               | <b>5.7%</b>                   |
| <b>United States</b>                    | 9.7%                            | 9.9%                               | <b>9.9%</b>                   |
| New England                             | 2.0%                            | 4.0%                               | <b>3.5%</b>                   |
| Middle Atlantic                         | 1.4%                            | 1.3%                               | <b>1.4%</b>                   |
| South Atlantic                          | 2.9%                            | 2.5%                               | <b>2.6%</b>                   |
| Rest of US                              | 3.4%                            | 2.1%                               | <b>2.4%</b>                   |
| <b>Overseas</b>                         | 2.9%                            | 2.1%                               | <b>2.3%</b>                   |

Note: **Culture-oriented travel parties** indicates those who **were primarily attracted by** at least one of cultural features that attracted to PEI **AND** participated in at least one of culture related activities while travelling in PEI; **Accidental cultural travel parties** indicates those who were **NOT** primarily attracted by at least one of cultural features that attracted to PEI **BUT** participated in at least one of culture related activities while travelling in PEI; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-2. Party Characteristics

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>                         | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| With my spouse/partner only (2 people)                          | <b>46.4%</b>                    | <b>40.9%</b>                       | 42.2%                         |
| As a family (including children under 18)                       | <b>13.8%</b>                    | <b>20.8%</b>                       | 19.2%                         |
| By myself/alone   | <b>7.0%</b>                     | <b>9.2%</b>                        | 8.7%                          |
| With friends  | <b>11.5%</b>                    | <b>5.7%</b>                        | 7.1%                          |
| With other family members (e.g., sister, brother, grandparents) | <b>7.1%</b>                     | <b>5.7%</b>                        | 6.0%                          |
| As a family (with no one under 18)                              | <b>4.7%</b>                     | <b>6.1%</b>                        | 5.7%                          |
| With other family/families (including children under 18)        | <b>2.8%</b>                     | <b>5.0%</b>                        | 4.5%                          |
| With one or more couples  | 3.0%                            | 3.5%                               | 3.4%                          |
| With family and friends   | 3.7%                            | 2.6%                               | 2.8%                          |
| Other   | 0.2%                            | 0.6%                               | 0.5%                          |

Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-3. Party Composition

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| Adult travelling alone                  | <b>7.0%</b>                     | <b>9.2%</b>                        | <b>8.7%</b>                   |
| 2 adults                                | <b>55.3%</b>                    | <b>47.3%</b>                       | <b>49.2%</b>                  |
| 3 or more adults                        | <b>19.7%</b>                    | <b>16.2%</b>                       | <b>17.0%</b>                  |
| Families *                              | <b>18.0%</b>                    | <b>27.3%</b>                       | <b>25.2%</b>                  |
| 1 adult with child(ren)                 | 1.3%                            | 1.7%                               | 1.6%                          |
| 2 adults with child(ren)                | <b>11.4%</b>                    | <b>14.7%</b>                       | <b>13.9%</b>                  |
| 3 or more adults with child(ren)        | <b>5.3%</b>                     | <b>10.9%</b>                       | <b>9.6%</b>                   |

Note: \* One, two, three or more adults travelling with child(ren) indicate family travel parties in this result; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-4. Age Composition

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| Young Adult (18 to 34) Travellers       | <b>3.7%</b>                     | <b>6.1%</b>                        | <b>5.6%</b>                   |
| Middle Aged (35 to 54) Travellers       | 9.6%                            | 8.1%                               | <b>8.4%</b>                   |
| Senior (55 and over) Travellers         | <b>47.7%</b>                    | <b>44.7%</b>                       | <b>45.4%</b>                  |
| Multi-generation Travellers             | <b>21.0%</b>                    | <b>13.7%</b>                       | <b>15.4%</b>                  |
| Adults with Child(ren) / Families       | <b>18.0%</b>                    | <b>27.3%</b>                       | <b>25.2%</b>                  |

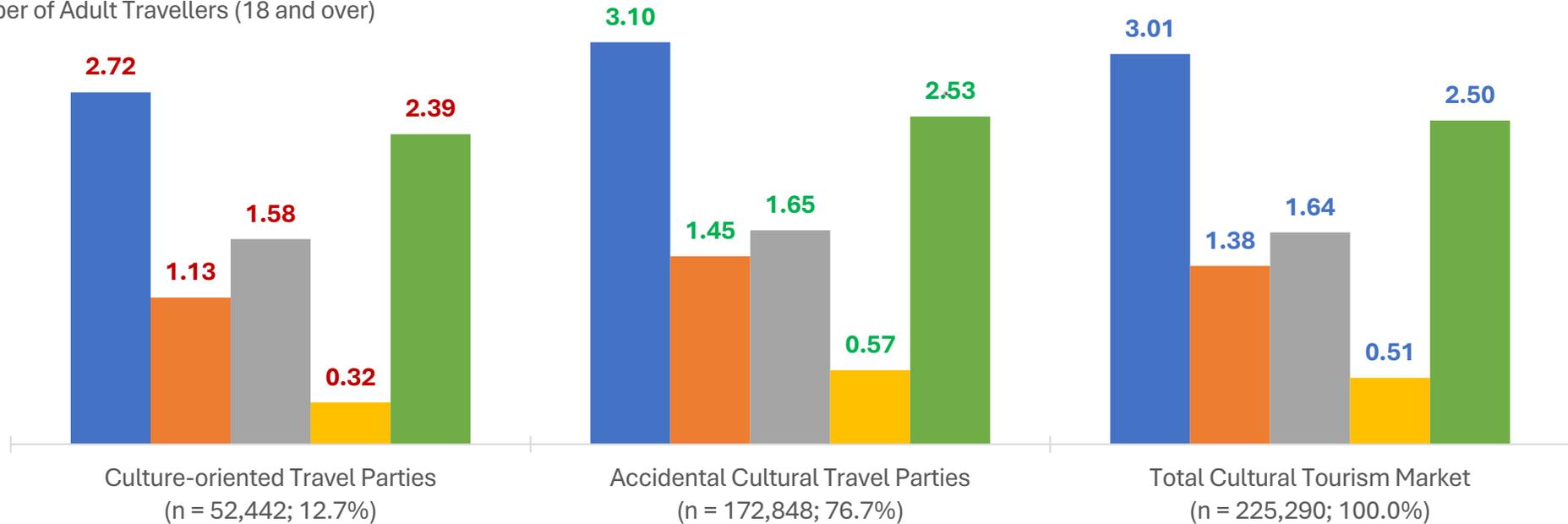
Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-5. Average Travel Party Size

Figure 7: Average Travel Party Size by Cultural Tourism Market

- Average Travel Party Size
- Average Number of Male Travellers
- Average Number of Female Travellers
- Average Number of Children Travellers (17 and under)
- Average Number of Adult Travellers (18 and over)



Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-6. Gender and Age of Individual Overnight Pleasure Travellers

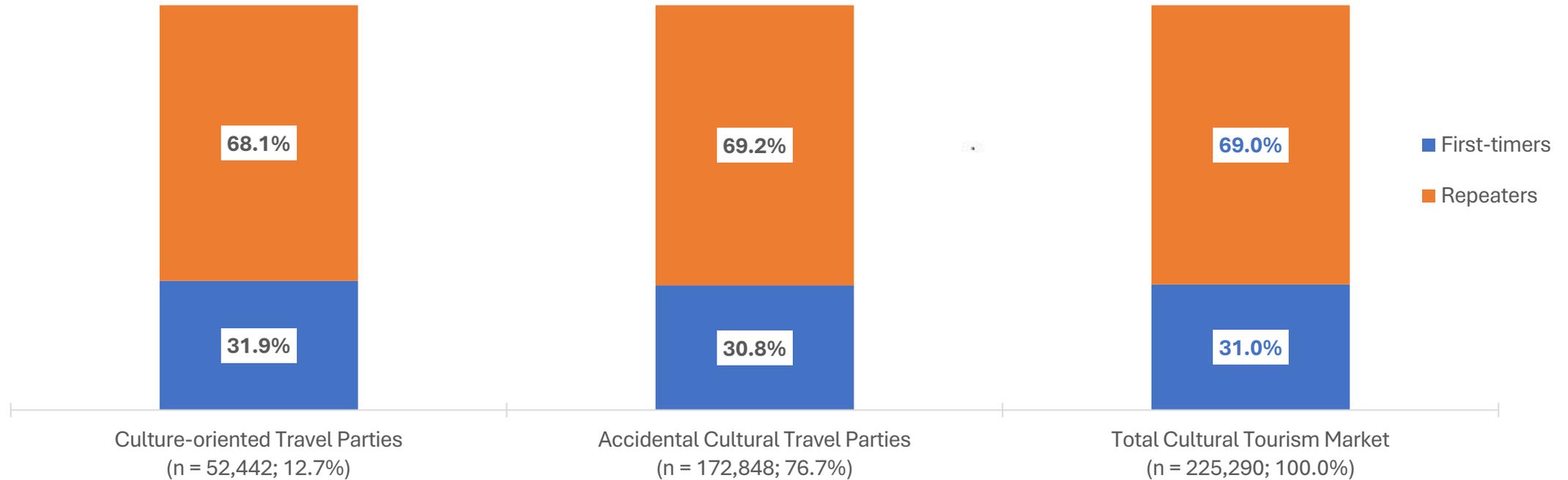
|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Individual Overnight Pleasure Travellers N (%)</b> | <b>142,425 (21.0%)</b>          | <b>536,238 (79.0%)</b>             | <b>678,663 (100.0%)</b>       |
| <b>Gender</b>   |                                 |                                    |                               |
| Male  | 41.7%                           | 46.8%                              | <b>45.7%</b>                  |
| Female  | 58.3%                           | 53.2%                              | <b>54.3%</b>                  |
| <b>Age</b>  |                                 |                                    |                               |
| Under 8 Years   | 4.0%                            | 8.4%                               | <b>7.5%</b>                   |
| 9-17 Years  | 7.8%                            | 10.0%                              | <b>9.6%</b>                   |
| 18-24 Years   | 4.0%                            | 3.4%                               | <b>3.5%</b>                   |
| 25-34 Years   | 6.2%                            | 8.8%                               | <b>8.3%</b>                   |
| 35-44 Years   | 13.0%                           | 12.2%                              | <b>12.4%</b>                  |
| 45-54 Years   | 13.5%                           | 12.2%                              | <b>12.4%</b>                  |
| 55-64 Years   | 19.8%                           | 19.1%                              | <b>19.2%</b>                  |
| 65-74 Years   | 22.7%                           | 20.6%                              | <b>21.0%</b>                  |
| 75 and Over   | 8.9%                            | 5.3%                               | <b>6.1%</b>                   |

Note: Results were based on multiple responses.



## 4-7. Type of Visitation

Figure 8: Type of Visitation by Cultural Tourism Market

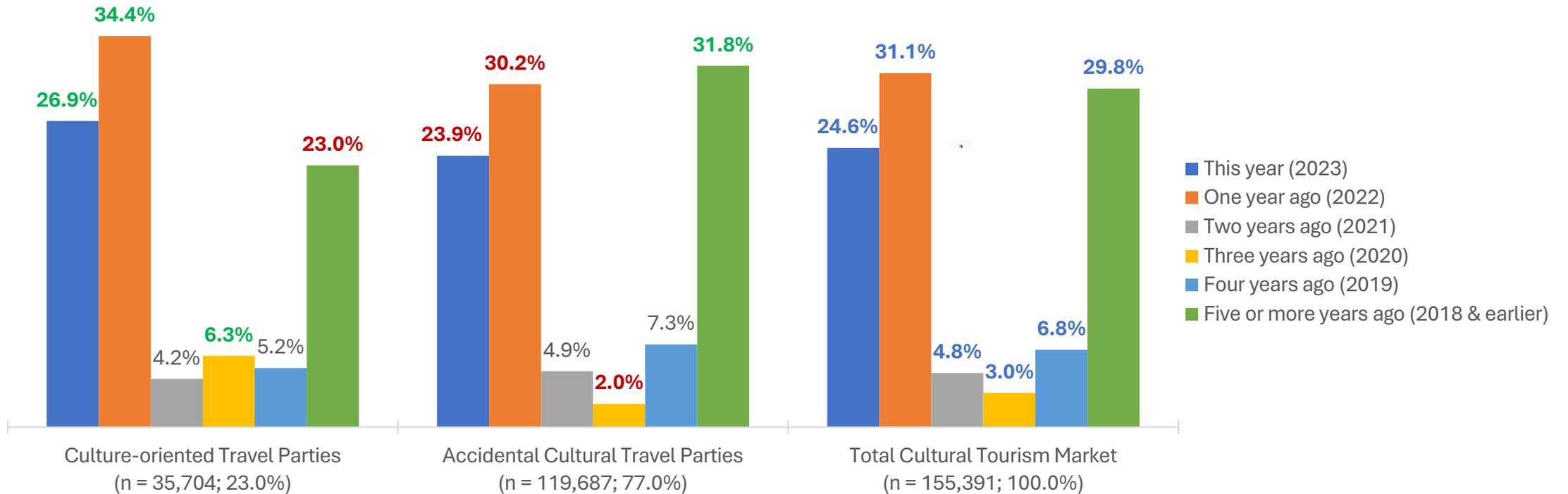


Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-8. Repeat Visit Pattern

Figure 9: Repeat Visit Pattern by Cultural Tourism Market

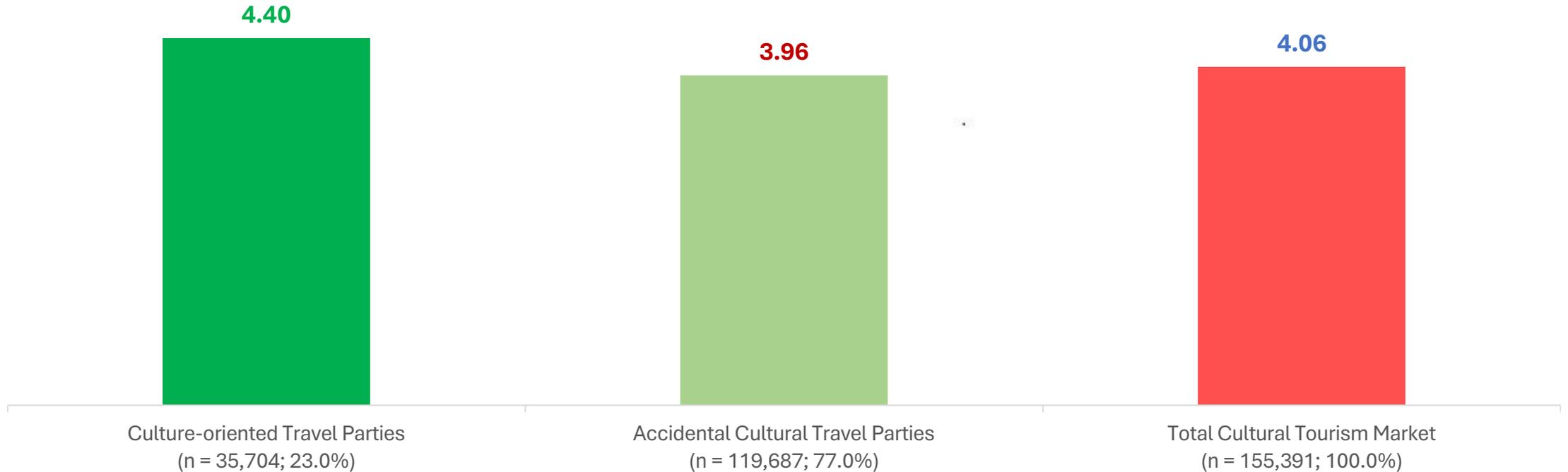


Note: Results were based on only repeat travel parties; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 4-9. Average Number of Times visited PEI in the Past Five Years

Figure 10: Average Number of Times visited PEI in the Past Five Years by Cultural Tourism Market



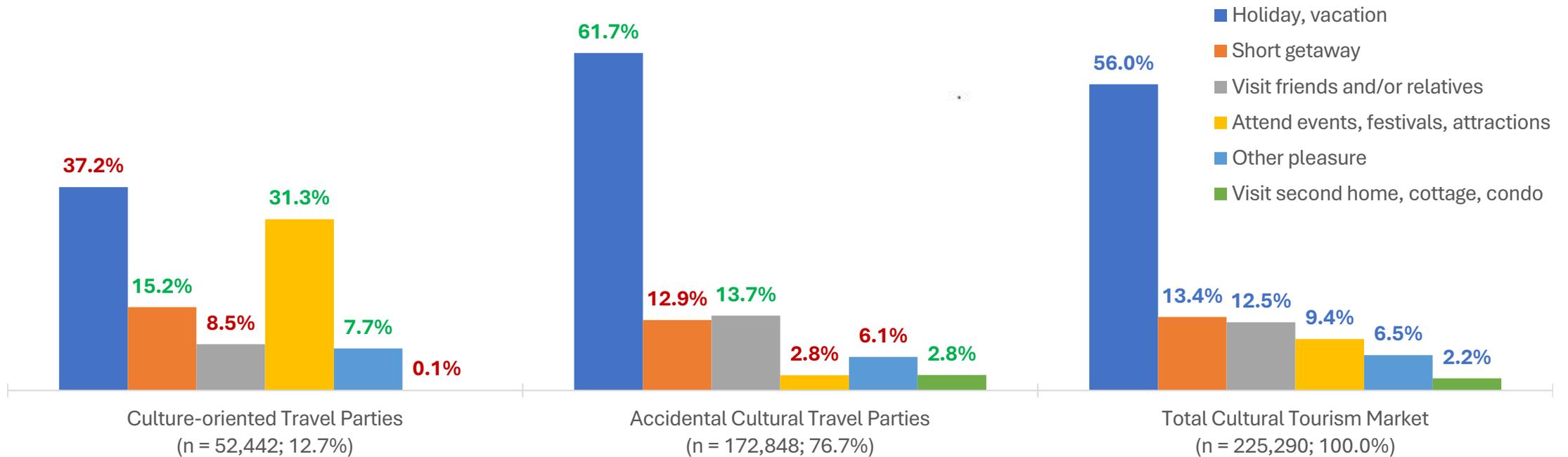
Note: Results were based on only repeat travel parties; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



# 5. WHY VISITORS COME

## 5-1. Primary Reason for the Trip to PEI

Figure 11: Primary Reason for the Trip to PEI by Cultural Tourism Market in 2023

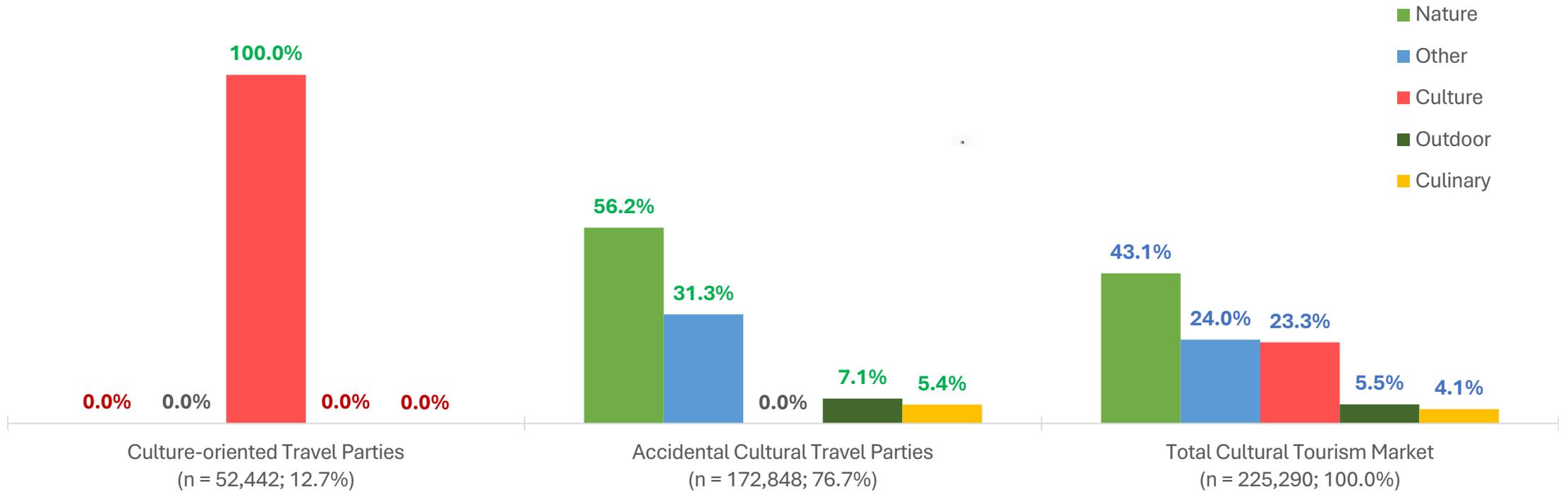


Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 5-2. Primary Features that Attracted

Figure 12: Primary Feature that Attracted to PEI by Cultural Tourism Market in 2023



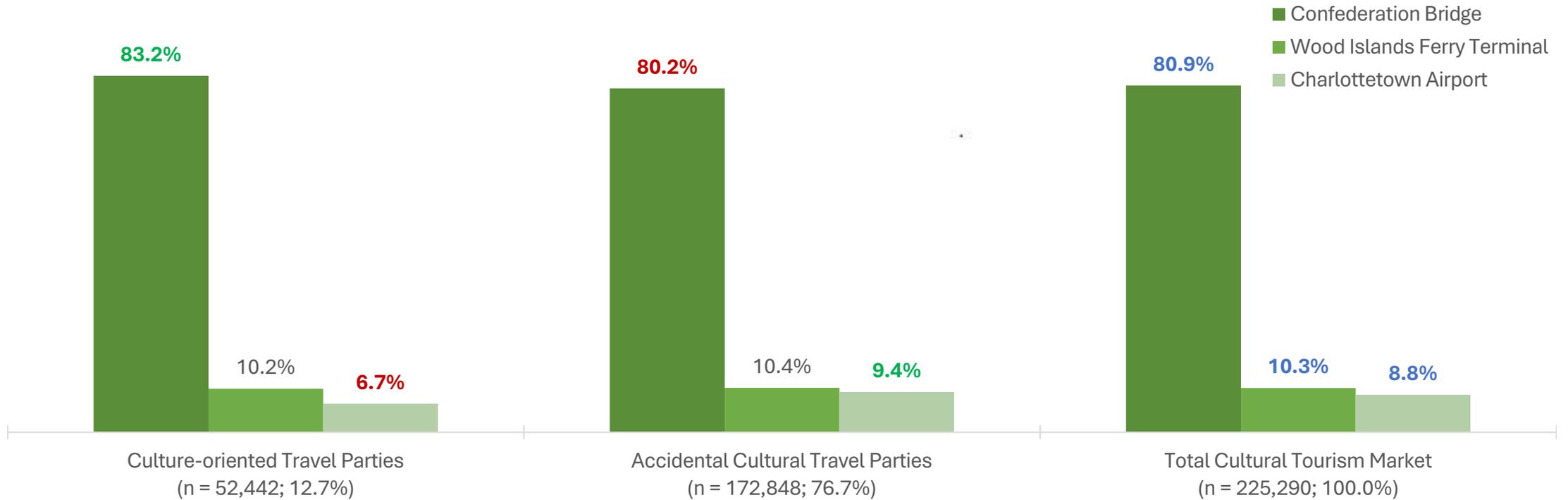
Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



# 6. HOW VISITORS COME

## 6-1. Entry Point

Figure 13: Entry Point by Cultural Tourism Market in 2023

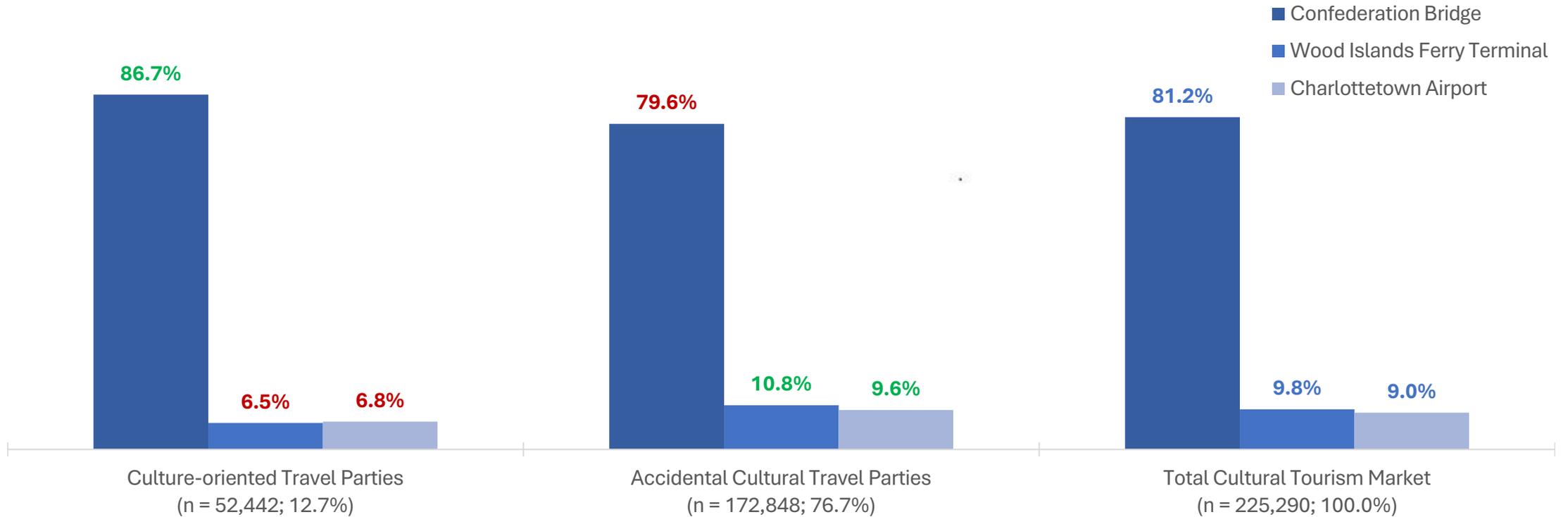


Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 6-2. Exit Point

Figure 14: Exit Point by Cultural Tourism Market in 2023

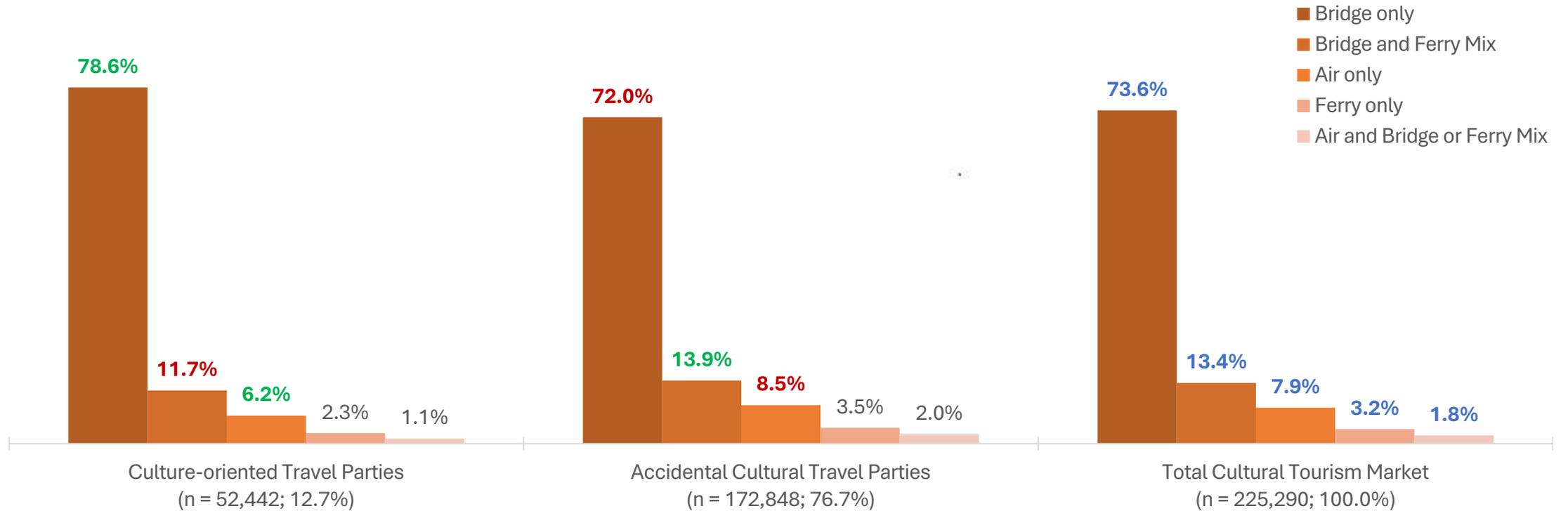


Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



### 6-3. Mix of Entry and Exit Points

Figure 15: Mix of Entry and Exit Points by Cultural Tourism Market in 2023



Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 6-4. Rental Vehicle Usage and Location of the Vehicle Pick-Up

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Rental Vehicle Usage</b>             |                                 |                                    |                               |
| Yes                                     | <b>32.4%</b>                    | <b>21.6%</b>                       | <b>23.5%</b>                  |
| No                                      | <b>67.6%</b>                    | <b>78.4%</b>                       | <b>76.5%</b>                  |
| <b>Location of the Vehicle Pick-Up</b>  | <b>7,657 (23.3%)</b>            | <b>25,158 (76.7%)</b>              | <b>32,815 (100.0%)</b>        |
| Nova Scotia                             | <b>48.0%</b>                    | <b>42.1%</b>                       | <b>43.5%</b>                  |
| Prince Edward Island                    | <b>28.6%</b>                    | <b>35.5%</b>                       | <b>33.9%</b>                  |
| New Brunswick                           | <b>5.4%</b>                     | <b>8.2%</b>                        | <b>7.5%</b>                   |
| New England state                       | <b>10.0%</b>                    | <b>5.4%</b>                        | <b>6.5%</b>                   |
| Ontario                                 | 1.4%                            | 3.8%                               | <b>3.3%</b>                   |
| Quebec                                  | 3.5%                            | 2.9%                               | <b>3.0%</b>                   |
| Other US state                          | 2.1%                            | 1.4%                               | <b>1.6%</b>                   |
| Other province                          | 1.0%                            | 0.6%                               | <b>0.7%</b>                   |

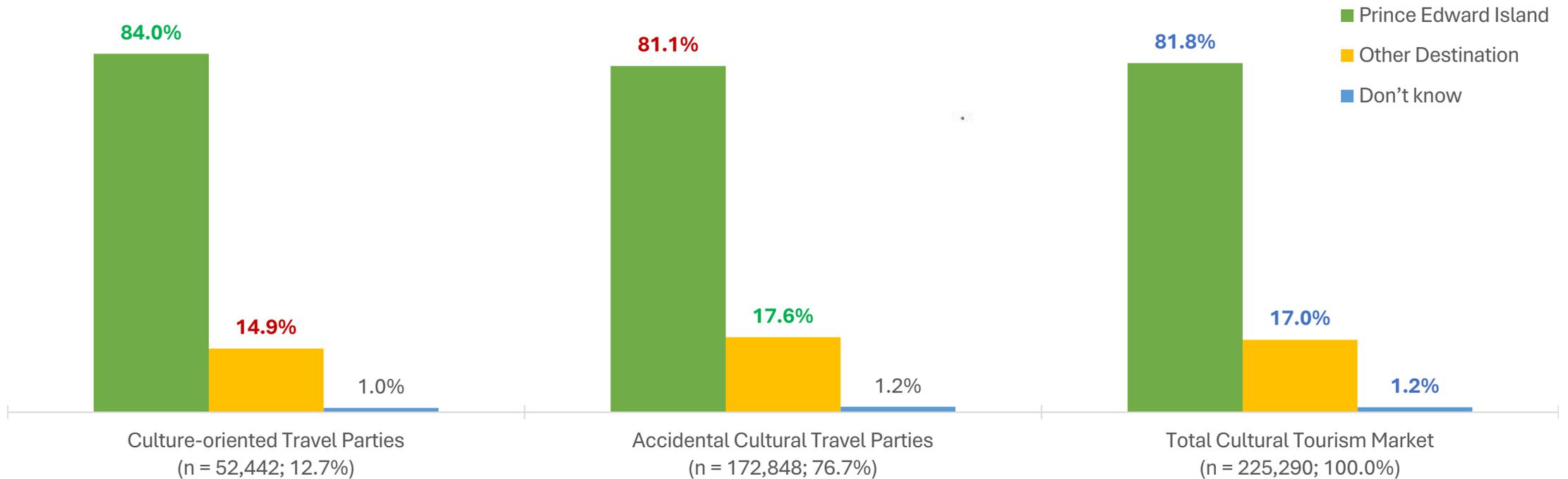
Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



# 7. WHERE VISITORS STAY

## 7-1. Primary Destination of the Trip

Figure 16: Primary Destination of the Trip by Cultural Tourism Market in 2023



Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 7-2. Trip Duration

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>   | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Average Trip Duration</b>  |                                 |                                    |                               |
| Total Nights of the Trip  | <b>6.29</b>                     | <b>9.68</b>                        | <b>8.89</b>                   |
| <b>Nights stayed in PEI</b>   | <b>3.42</b>                     | <b>5.63</b>                        | <b>5.11</b>                   |
| <b>(Nights in paid accommodations in PEI)</b>   | <b>(3.03)</b>                   | <b>(4.11)</b>                      | <b>(3.86)</b>                 |
| <b>(Nights in paid accommodations in PEI through a peer-to-peer lodging website such as Airbnb, VRBO, etc.)</b> | <b>(0.98)</b>                   | <b>(1.47)</b>                      | <b>(1.36)</b>                 |
| Nights stayed in New Brunswick  | <b>0.61</b>                     | <b>0.99</b>                        | <b>0.90</b>                   |
| Nights stayed in Nova Scotia  | <b>1.08</b>                     | <b>1.40</b>                        | <b>1.32</b>                   |
| Nights stayed in Newfoundland and Labrador  | <b>0.11</b>                     | <b>0.27</b>                        | <b>0.23</b>                   |
| Nights stayed in Magdalen Islands   | <b>0.06</b>                     | <b>0.12</b>                        | <b>0.11</b>                   |
| Nights stayed elsewhere   | <b>1.01</b>                     | <b>1.28</b>                        | <b>1.22</b>                   |

Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



### 7-3. Overnight Stays in PEI Region (Parties)

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>  | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Total Accumulated Parties Staying at Least One Night in the Specific Region *</b> |                                 |                                    |                               |
| Greater Charlottetown Area   | 58.1%                           | 40.2%                              | <b>44.3%</b>                  |
| Green Gables Shore   | 27.3%                           | 41.1%                              | <b>37.9%</b>                  |
| Points East Coastal Drive  | 6.0%                            | 16.2%                              | <b>13.8%</b>                  |
| Summerside   | 12.5%                           | 13.4%                              | <b>13.2%</b>                  |
| North Cape Coastal Drive   | 6.0%                            | 8.8%                               | <b>8.1%</b>                   |
| Red Sands Shore  | 3.2%                            | 8.2%                               | <b>7.1%</b>                   |
| <b>Total Overnight Stays (Parties)</b>   | <b>59,351</b>                   | <b>220,985</b>                     | <b>280,336</b>                |
| <b>(%)</b>   | <b>(21.2%)</b>                  | <b>(78.8%)</b>                     | <b>(100.0%)</b>               |

Note: \* Results were based on multiple responses; % was based on number of overnight pleasure parties in each segment.



## 7-4. Overnight Stays in PEI Region (Nights)

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>                                   | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Total Accumulated Nights Spent by Parties in the Specific Region *</b> |                                 |                                    |                               |
| Green Gables Shore  | 29.1%                           | 37.5%                              | 36.2%                         |
| Greater Charlottetown Area  | 47.3%                           | 26.4%                              | 29.6%                         |
| Points East Coastal Drive   | 5.3%                            | 14.4%                              | 13.0%                         |
| Summerside  | 11.2%                           | 7.9%                               | 8.4%                          |
| North Cape Coastal Drive  | 4.2%                            | 7.0%                               | 6.6%                          |
| Red Sands Shore   | 2.9%                            | 6.9%                               | 6.3%                          |
| <b>Total Overnight Stays (Nights)</b>                                     | <b>179,340</b>                  | <b>972,469</b>                     | <b>1,151,809</b>              |
| <b>(%)</b>  | <b>(15.6%)</b>                  | <b>(84.4%)</b>                     | <b>(100.0%)</b>               |

Note: \* Results were based on multiple responses; % was based on total overnight stays (nights) in each segment.



## 7-5. Average Length of Stay in PEI Region

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>  | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Average Number of Nights Stayed in PEI</b>  | <b>3.42</b>                     | <b>5.63</b>                        | <b>5.11</b>                   |
| <b>Average Number of Nights Spent in Each Region (For All Visitors Regardless of Each Region Stayed)</b> |                                 |                                    |                               |
| Green Gables Shore   | <b>1.00</b>                     | <b>2.11</b>                        | <b>1.85</b>                   |
| Greater Charlottetown Area   | <b>1.62</b>                     | <b>1.48</b>                        | <b>1.52</b>                   |
| Points East Coastal Drive  | <b>0.18</b>                     | <b>0.81</b>                        | <b>0.66</b>                   |
| Summerside Area  | <b>0.38</b>                     | <b>0.44</b>                        | <b>0.43</b>                   |
| North Cape Coastal Drive   | <b>0.14</b>                     | <b>0.39</b>                        | <b>0.34</b>                   |
| Red Sands Shore  | <b>0.10</b>                     | <b>0.39</b>                        | <b>0.32</b>                   |
| <b>Average Number of Nights Spent in Each Region (For Only Those Who Stayed in the Region)</b>           |                                 |                                    |                               |
| Green Gables Shore   | <b>3.65</b>                     | <b>5.14</b>                        | <b>4.89</b>                   |
| Points East Coastal Drive  | <b>3.00</b>                     | <b>5.01</b>                        | <b>4.80</b>                   |
| Red Sands Shore  | <b>3.11</b>                     | <b>4.71</b>                        | <b>4.54</b>                   |
| North Cape Coastal Drive   | <b>2.41</b>                     | <b>4.47</b>                        | <b>4.12</b>                   |
| Greater Charlottetown Area   | <b>2.78</b>                     | <b>3.70</b>                        | <b>3.42</b>                   |
| Summerside Area  | <b>3.05</b>                     | <b>3.30</b>                        | <b>3.25</b>                   |

Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 7-6. Overnight Stays in Type of Accommodation (Parties)

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>   | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Total Accumulated Parties Staying at Least One Night in the Specific Type of Accommodation *</b> |                                 |                                    |                               |
| Hotel, Motel, or Resort   | 50.4%                           | 29.3%                              | 34.2%                         |
| Cottage or Cabin  | 12.3%                           | 30.4%                              | 26.2%                         |
| Campground/Trailer (RV) Park  | 12.1%                           | 16.1%                              | 15.1%                         |
| Home of Friends or Relatives  | 9.9%                            | 15.6%                              | 14.3%                         |
| B&B or Tourist Home   | 10.7%                           | 8.5%                               | 9.0%                          |
| Inn   | 7.6%                            | 4.9%                               | 5.5%                          |
| Own Property  | 0.4%                            | 3.1%                               | 2.4%                          |
| Other (e.g., hostel)  | 1.9%                            | 2.4%                               | 2.3%                          |
| <b>Total Overnight Stays (Parties)</b>  | <b>55,177</b>                   | <b>190,479</b>                     | <b>245,656</b>                |
| <b>(%)</b>  | <b>(22.5%)</b>                  | <b>(77.5%)</b>                     | <b>(100.0%)</b>               |

Note: \* Results were based on multiple responses; % was based on number of overnight pleasure parties in each segment.

## 7-7. Overnight Stays in Type of Accommodation (Nights)

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>  | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Total Accumulated Nights Spent by Parties in the Specific Type of Accommodation *</b> |                                 |                                    |                               |
| Cottage or Cabin   | 14.3%                           | 31.5%                              | 28.9%                         |
| Hotel, Motel, or Resort  | 41.5%                           | 17.4%                              | 21.1%                         |
| Campground/Trailer (RV) Park   | 15.4%                           | 17.2%                              | 16.9%                         |
| B&B or Tourist Home  | 10.3%                           | 6.6%                               | 7.2%                          |
| Home of Friends or Relatives   | 10.0%                           | 15.6%                              | 14.7%                         |
| Inn  | 5.8%                            | 2.6%                               | 3.1%                          |
| Other (e.g., hostel)   | 2.0%                            | 1.9%                               | 1.9%                          |
| Own Property   | 0.8%                            | 7.2%                               | 6.2%                          |
| <b>Total Overnight Stays (Nights)</b>  | <b>179,340</b>                  | <b>972,469</b>                     | <b>1,151,809</b>              |
| <b>(%)</b>   | <b>(15.6%)</b>                  | <b>(84.4%)</b>                     | <b>(100.0%)</b>               |

Note: \* Results were based on multiple responses; % was based on number of total overnight stays (nights) in each segment.



## 7-8. Average Length of Stay in Type of Accommodation

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>  | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Average Number of Nights Stayed in PEI</b>  | <b>3.42</b>                     | <b>5.63</b>                        | <b>5.11</b>                   |
| <b>Average Number of Nights Spent in Each Type of Accommodation (For All Visitors Regardless of Each Type of Accommodation Stayed)</b> |                                 |                                    |                               |
| Cottage or Cabin   | <b>0.49</b>                     | <b>1.77</b>                        | <b>1.48</b>                   |
| Hotel, Motel, or Resort  | <b>1.42</b>                     | <b>0.98</b>                        | <b>1.08</b>                   |
| Campground/Trailer (RV) Park   | <b>0.53</b>                     | <b>0.97</b>                        | <b>0.86</b>                   |
| Home of Friends or Relatives   | <b>0.34</b>                     | <b>0.88</b>                        | <b>0.75</b>                   |
| B&B or Tourist Home  | 0.35                            | 0.37                               | <b>0.37</b>                   |
| Own Property   | <b>0.03</b>                     | <b>0.40</b>                        | <b>0.32</b>                   |
| Inn  | <b>0.20</b>                     | <b>0.15</b>                        | <b>0.16</b>                   |
| Other (e.g., hostel)   | <b>0.07</b>                     | <b>0.11</b>                        | <b>0.10</b>                   |
| <b>Average Number of Nights Spent in Each Type of Accommodation (For Only Those Who Stayed in Each Type of Accommodation)</b>          |                                 |                                    |                               |
| Own Property   | <b>7.60</b>                     | <b>13.13</b>                       | <b>12.94</b>                  |
| Campground/Trailer (RV) Park   | <b>4.34</b>                     | <b>6.02</b>                        | <b>5.71</b>                   |
| Cottage or Cabin   | <b>3.99</b>                     | <b>5.85</b>                        | <b>5.64</b>                   |
| Home of Friends or Relatives   | <b>3.45</b>                     | <b>5.62</b>                        | <b>5.27</b>                   |
| Other (e.g., hostel)   | <b>3.57</b>                     | <b>4.40</b>                        | <b>4.24</b>                   |
| B&B or Tourist Home  | <b>3.31</b>                     | <b>4.37</b>                        | <b>4.08</b>                   |
| Hotel, Motel, or Resort  | <b>2.81</b>                     | <b>3.34</b>                        | <b>3.16</b>                   |
| Inn  | <b>2.59</b>                     | <b>3.03</b>                        | <b>2.89</b>                   |

Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 7-9. PEI Regions Visited

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| Greater Charlottetown Area              | 77.6%                           | 78.0%                              | <b>77.9%</b>                  |
| Green Gables Shore                      | <b>58.1%</b>                    | <b>76.1%</b>                       | <b>71.9%</b>                  |
| Summerside Area                         | <b>34.5%</b>                    | <b>48.3%</b>                       | <b>45.1%</b>                  |
| Red Sands Shore                         | <b>29.1%</b>                    | <b>43.3%</b>                       | <b>40.0%</b>                  |
| Points East Coastal Drive               | <b>20.8%</b>                    | <b>42.5%</b>                       | <b>37.5%</b>                  |
| North Cape Coastal Drive                | <b>21.6%</b>                    | <b>30.8%</b>                       | <b>28.6%</b>                  |

Note: Results were based on multiple responses. A “visit” was defined as dining, visiting an attraction, or participating in an activity in the region, and not travelling through the region only; **Green Numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 8. WHAT VISITORS DO

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>                          | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| Driving tour (scenic drives/views)                               | 54.0%                           | 75.1%                              | 70.2%                         |
| Going to a full-service restaurant                               | 56.0%                           | 69.3%                              | 66.2%                         |
| Going to a beach   | 40.3%                           | 72.4%                              | 64.9%                         |
| Shopping for local products                                      | 47.9%                           | 64.2%                              | 60.4%                         |
| Sightseeing, appreciating pastoral or rural settings             | 41.1%                           | 62.1%                              | 57.2%                         |
| Visiting a national or provincial park                           | 41.3%                           | 59.6%                              | 55.3%                         |
| Sampling local culinary products                                 | 33.8%                           | 55.3%                              | 50.3%                         |
| <b>Visiting historic/heritage sites, or cultural attractions</b> | <b>36.9%</b>                    | <b>50.5%</b>                       | <b>47.4%</b>                  |
| Seeing natural wonders   | 31.6%                           | 52.0%                              | 47.3%                         |
| Shopping for general merchandise                                 | 35.2%                           | 50.3%                              | 46.8%                         |
| <b>Visiting Anne of Green Gables and related attractions</b>     | 37.1%                           | 38.4%                              | 38.1%                         |
| Visiting friends and/or relatives                                | 20.6%                           | 32.0%                              | 29.3%                         |
| <b>Going to a museum or art gallery</b>                          | <b>21.3%</b>                    | <b>27.8%</b>                       | <b>26.3%</b>                  |
| <b>Attending a festival, event, or concert</b>                   | <b>36.8%</b>                    | <b>19.1%</b>                       | <b>23.2%</b>                  |
| Using the Confederation Trail or other trails                    | 8.8%                            | 23.9%                              | 20.4%                         |

Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 8. WHAT VISITORS DO (cont'd)

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>                 | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| Attending a live performance/entertainment              | 22.1%                           | 18.6%                              | 19.4%                         |
| Visiting a theme, fun or amusement park                 | 10.3%                           | 21.3%                              | 18.7%                         |
| Participating in nature-based outdoor activities        | 6.3%                            | 17.0%                              | 14.5%                         |
| Participating in water-based activities                 | 4.4%                            | 17.3%                              | 14.3%                         |
| Experiencing night-life activities                      | 9.3%                            | 8.9%                               | 9.0%                          |
| Taking part in an authentic PEI experience              | 1.5%                            | 8.0%                               | 6.4%                          |
| Playing golf (not miniature)                            | 2.4%                            | 7.4%                               | 6.3%                          |
| Other   | 4.8%                            | 6.0%                               | 5.7%                          |
| Attending a sports event or tournament (as a spectator) | 9.6%                            | 3.4%                               | 4.8%                          |
| Going to a casino/racino (Charlottetown or Summerside)  | 3.8%                            | 4.1%                               | 4.0%                          |
| Participating in recreational fishing or hunting        | 0.6%                            | 5.0%                               | 4.0%                          |
| Health and wellness activities (yoga, spa, sauna, etc.) | 1.5%                            | 2.8%                               | 2.5%                          |
| Participating in recreational motorized activities      | 0.2%                            | 1.7%                               | 1.3%                          |
| Playing disc golf                                       | 0.6%                            | 0.6%                               | 0.6%                          |
| Participating in cold-weather activities                | 0.1%                            | 0.5%                               | 0.4%                          |

Note: **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 9. WHAT VISITORS SPEND

### 9-1. Estimated Total Direct Expenditures

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties <i>N</i> (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Estimated Total Direct Expenditures (%)</b> | <b>\$84,536,139</b>             | <b>\$430,074,701</b>               | <b>\$514,610,840</b>          |
| Travel packages (if purchased)                 | \$2,617,398                     | \$10,402,639                       | \$13,020,036                  |
| Accommodations                                 | \$29,782,280                    | \$172,041,969                      | \$201,824,249                 |
| Food and beverages at restaurants              | \$15,933,788                    | \$79,133,565                       | \$95,067,353                  |
| Food and beverages at stores                   | \$4,464,200                     | \$35,588,067                       | \$40,052,267                  |
| Vehicle operation                              | \$7,881,861                     | \$39,102,111                       | \$46,983,972                  |
| Car rentals in PEI and local transportation    | \$1,919,357                     | \$10,233,486                       | \$12,152,842                  |
| Shopping                                       | \$10,451,574                    | \$43,021,115                       | \$53,472,689                  |
| Recreation and entertainment                   | \$9,249,230                     | \$26,497,887                       | \$35,747,117                  |
| Other expenditures                             | \$2,236,452                     | \$14,053,863                       | \$16,290,315                  |

Note: Total expenditures in each season were calculated as follows: Number of overnight pleasure travel parties × average spending per party per visit or number of overnight pleasure travellers × average length of stay × average spending per person per night.



## 9-2. Percentage of Each Item of Estimated Total Direct Expenditures

|  | Culture-oriented<br>Travel Parties | Accidental Cultural<br>Travel Parties | Total<br>Cultural Tourism Market |
|--|------------------------------------|---------------------------------------|----------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>        | <b>52,442 (12.7%)</b>              | <b>172,848 (76.7%)</b>                | <b>225,290 (100.0%)</b>          |
| <b>Estimated Total Direct Expenditures (%)</b> | <b>(16.4%)</b>                     | <b>(83.6%)</b>                        | <b>(100.0%)</b>                  |
| Travel packages (if purchased)                 | 3.1%                               | 2.4%                                  | 2.5%                             |
| Accommodations                                 | 35.2%                              | 40.0%                                 | 39.2%                            |
| Food and beverages at restaurants              | 18.8%                              | 18.4%                                 | 18.5%                            |
| Food and beverages at stores                   | 5.3%                               | 8.3%                                  | 7.8%                             |
| Vehicle operation                              | 9.3%                               | 9.1%                                  | 9.1%                             |
| Car rentals in PEI and local transportation    | 2.3%                               | 2.4%                                  | 2.4%                             |
| Shopping                                       | 12.4%                              | 10.0%                                 | 10.4%                            |
| Recreation and entertainment                   | 10.9%                              | 6.2%                                  | 6.9%                             |
| Other expenditures                             | 2.6%                               | 3.3%                                  | 3.2%                             |



### 9-3. Average Spending per Party per Visit

|  | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|--|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>          | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Estimated Total Direct Expenditures (%)</b>   | <b>\$1,612.00</b>               | <b>\$2,488.16</b>                  | <b>\$2,284.22</b>             |
| Travel packages (if purchased)                   | \$49.91                         | \$60.18                            | \$57.79                       |
| Accommodations                                   | \$567.91                        | \$995.34                           | \$895.84                      |
| Food and beverages at restaurants                | \$303.84                        | \$457.82                           | \$421.98                      |
| Food and beverages at stores                     | \$85.13                         | \$205.89                           | \$177.78                      |
| Vehicle operation                                | \$150.30                        | \$226.22                           | \$208.55                      |
| Car rentals in PEI and local transportation      | \$36.60                         | \$59.21                            | \$53.94                       |
| Shopping   | \$199.30                        | \$248.90                           | \$237.35                      |
| Recreation and entertainment                     | \$176.37                        | \$153.30                           | \$158.67                      |
| Other expenditures                               | \$42.65                         | \$81.31                            | \$72.31                       |
| <b>Average Length of Stay (nights)</b>           | <b>3.42</b>                     | <b>5.63</b>                        | <b>5.11</b>                   |
| <b>Average Party Size (persons)</b>              | <b>2.72</b>                     | <b>3.10</b>                        | <b>3.01</b>                   |
| <b>Estimated Number of Individual Travellers</b> | <b>142,425 (21.0%)</b>          | <b>536,238 (79.0%)</b>             | <b>678,663 (100.0%)</b>       |



## 9-4. Average Spending per Person per Night

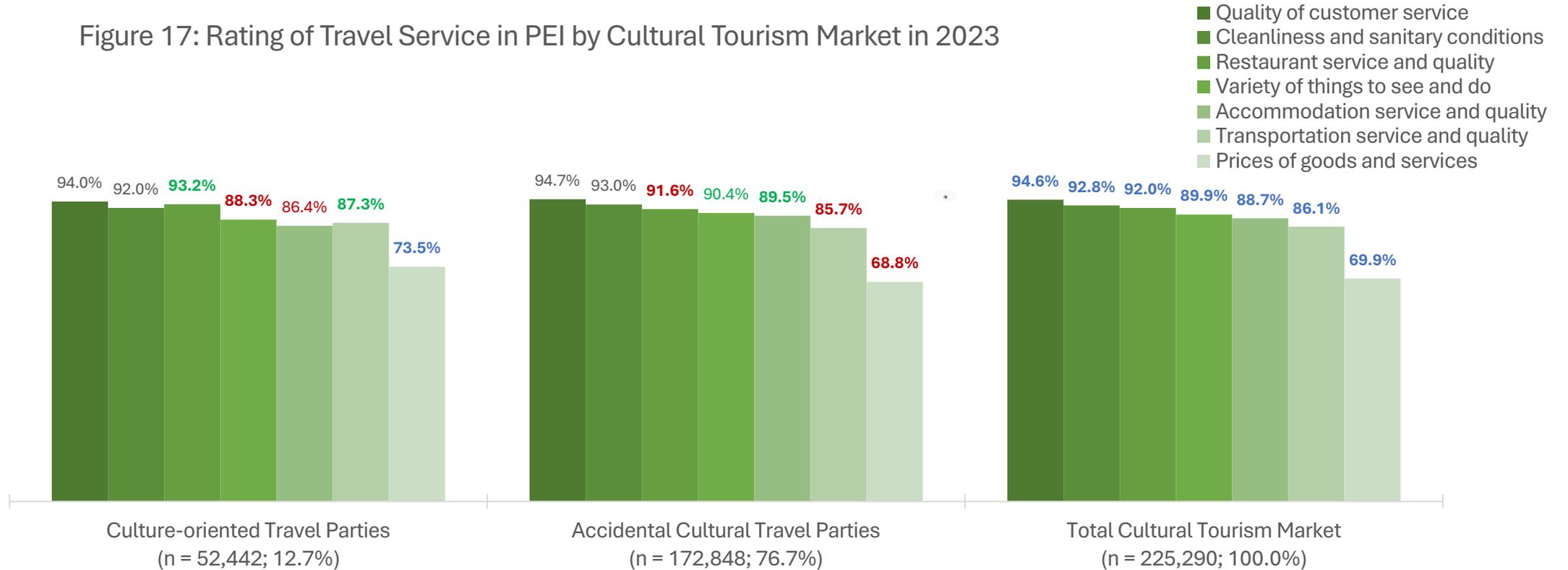
|  | Culture-oriented<br>Travel Parties | Accidental Cultural<br>Travel Parties | Total<br>Cultural Tourism Market |
|--|------------------------------------|---------------------------------------|----------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>          | <b>52,442 (12.7%)</b>              | <b>172,848 (76.7%)</b>                | <b>225,290 (100.0%)</b>          |
| <b>Estimated Total Direct Expenditures (%)</b>   | <b>\$173.58</b>                    | <b>\$142.52</b>                       | <b>\$148.29</b>                  |
| Travel packages (if purchased)                   | \$5.37                             | \$3.45                                | \$3.75                           |
| Accommodations                                   | \$61.15                            | \$57.01                               | \$58.16                          |
| Food and beverages at restaurants                | \$32.72                            | \$26.22                               | \$27.39                          |
| Food and beverages at stores                     | \$9.17                             | \$11.79                               | \$11.54                          |
| Vehicle operation                                | \$16.18                            | \$12.96                               | \$13.54                          |
| Car rentals in PEI and local transportation      | \$3.94                             | \$3.39                                | \$3.50                           |
| Shopping   | \$21.46                            | \$14.26                               | \$15.41                          |
| Recreation and entertainment                     | \$18.99                            | \$8.78                                | \$10.30                          |
| Other expenditures                               | \$4.59                             | \$4.66                                | \$4.69                           |
| <b>Average Length of Stay (nights)</b>           | <b>3.42</b>                        | <b>5.63</b>                           | <b>5.11</b>                      |
| <b>Average Party Size (persons)</b>              | <b>2.72</b>                        | <b>3.10</b>                           | <b>3.01</b>                      |
| <b>Estimated Number of Individual Travellers</b> | <b>142,425 (21.0%)</b>             | <b>536,238 (79.0%)</b>                | <b>678,663 (100.0%)</b>          |



# 10. HOW PEI RATES

## 10-1. Rating of Travel Services

Figure 17: Rating of Travel Service in PEI by Cultural Tourism Market in 2023

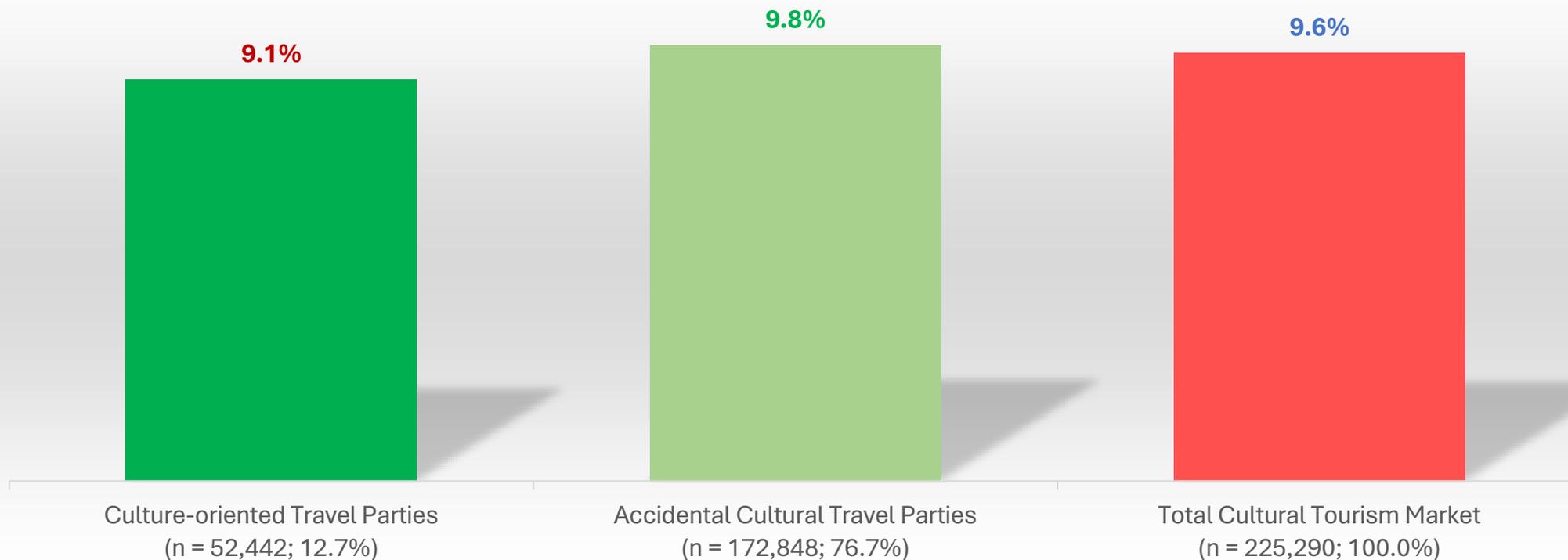


Note: Results were based on those who rated each of the items; while percent (%) indicates the percentage of respondents who rated the item 4 or 5 based on a 5-point Likert-type scale; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.



## 10-2. Instance of Complaints

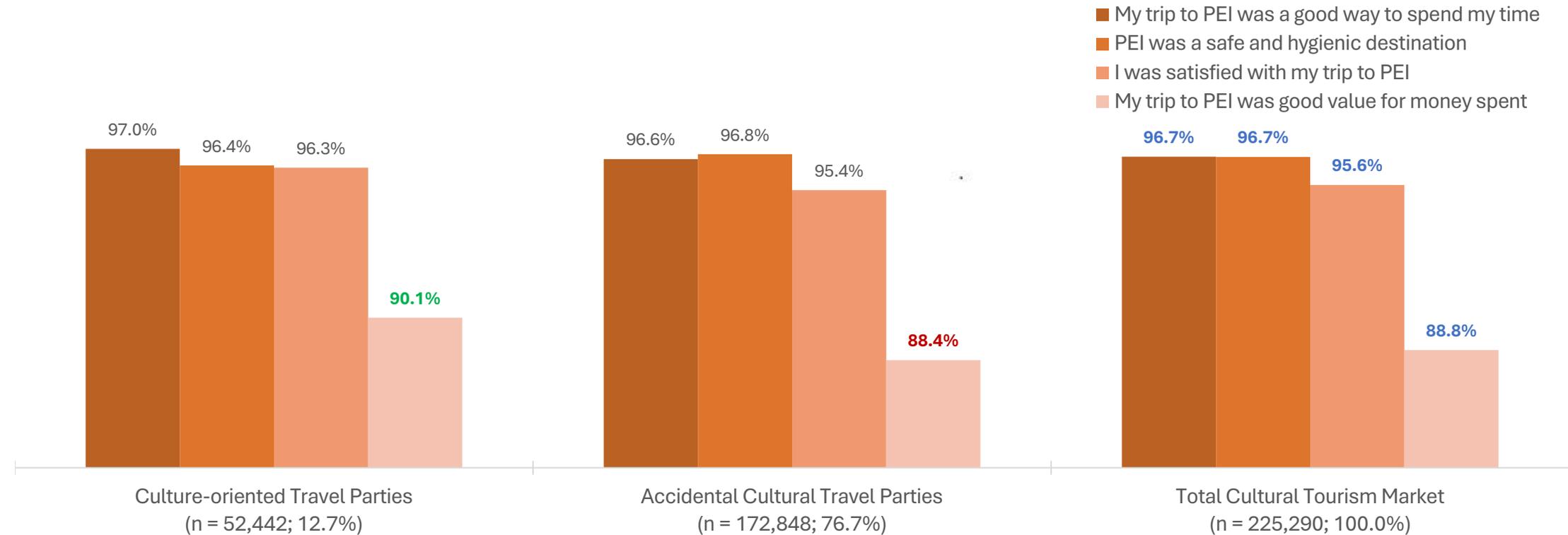
Figure 18: Instance of Complaints by Cultural Tourism Market in 2023



Note: **Green Bold Numbers** indicate significantly higher and **Red Bold Numbers** indicate significantly lower than the other group, at 95% confidence level.

## 10-3. Travel Evaluation and Overall Satisfaction

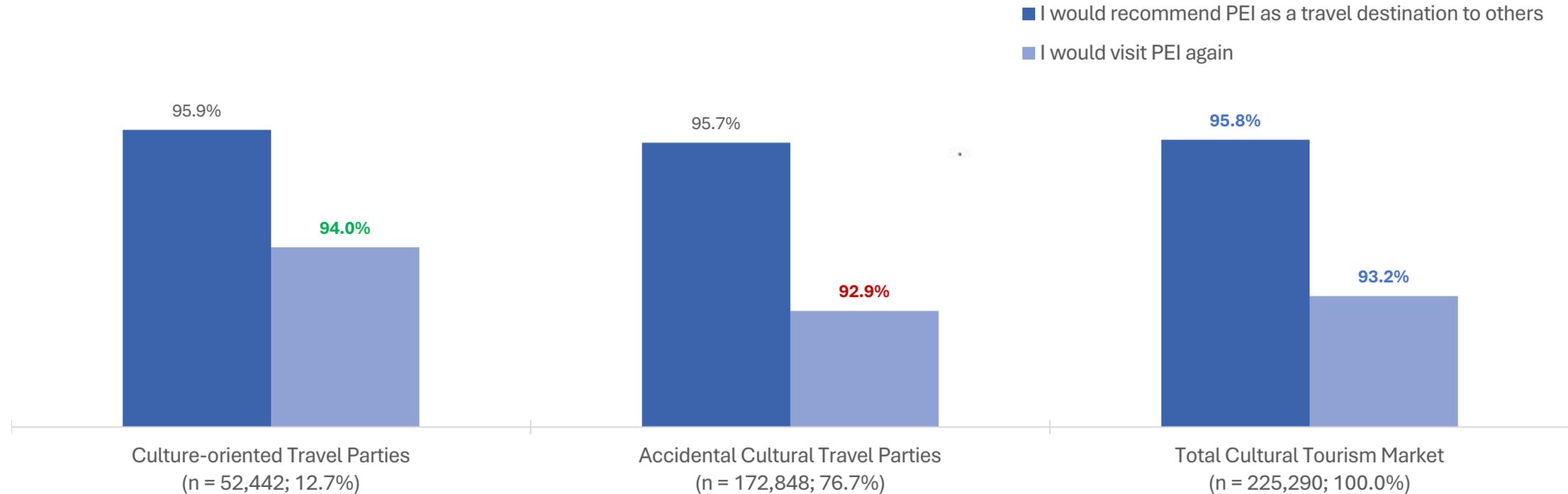
Figure 19: Travel Evaluation and Overall Satisfaction by Cultural Tourism Market in 2023



Note: Results were based on those who rated each of the items; while percent (%) indicates the percentage of respondents who rated the item 4 or 5 based on a 5-point Likert-type scale; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.

## 10-4. Future Behavioural Intentions

Figure 20: Future Behavioural Intentions by Cultural Tourism Market in 2023



Note: Results were based on those who rated each of the items; while percent (%) indicates the percentage of respondents who rated the item 4 or 5 based on a 5-point Likert-type scale; **Green numbers** indicate significantly higher and **red numbers** indicate significantly lower than the other group, at 95% confidence level.

## 11. Demographic Characteristics of Respondents

|   | Culture-oriented<br>Travel Parties | Accidental Cultural<br>Travel Parties | Total<br>Cultural Tourism Market |
|---|------------------------------------|---------------------------------------|----------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>              | <b>172,848 (76.7%)</b>                | <b>225,290 (100.0%)</b>          |
| <b>Gender</b>                           |                                    |                                       |                                  |
| Male                                    | 31.7%                              | 36.8%                                 | <b>35.6%</b>                     |
| Female                                  | 68.1%                              | 62.7%                                 | <b>64.0%</b>                     |
| Other                                   | 0.1%                               | 0.5%                                  | <b>0.4%</b>                      |
| <b>Age</b>                              |                                    |                                       |                                  |
| 18 to 24                                | 2.5%                               | 1.8%                                  | <b>2.0%</b>                      |
| 25 to 34                                | 7.2%                               | 9.1%                                  | <b>8.6%</b>                      |
| 35 to 44                                | 16.1%                              | 14.8%                                 | <b>15.1%</b>                     |
| 45 to 54                                | 15.9%                              | 15.5%                                 | <b>15.6%</b>                     |
| 55 to 64                                | 24.1%                              | 25.2%                                 | <b>24.9%</b>                     |
| 65 to 74                                | 25.2%                              | 26.3%                                 | <b>26.0%</b>                     |
| 75 and over                             | 9.0%                               | 7.3%                                  | <b>7.7%</b>                      |
| <b>Mother Tongue</b>                    |                                    |                                       |                                  |
| English                                 | 76.2%                              | 78.7%                                 | <b>78.1%</b>                     |
| French                                  | 18.4%                              | 16.7%                                 | <b>17.1%</b>                     |
| Other                                   | 5.5%                               | 4.6%                                  | <b>4.8%</b>                      |



## 11. Demographic Characteristics of Respondents (cont'd)

|   |               | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>                     |               | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Marital Status</b>                                       |               |                                 |                                    |                               |
| Single  |               | 18.7%                           | 15.9%                              | <b>16.6%</b>                  |
| Married/living common law                                   |               | 76.1%                           | 79.3%                              | <b>78.6%</b>                  |
| Other   |               | 5.2%                            | 4.8%                               | <b>4.8%</b>                   |
| <b>Average Number of Children Living in the Household *</b> |               |                                 |                                    |                               |
| Children 17 years and younger                               | Valid N       | 10,522                          | 40,102                             | <b>50,624</b>                 |
|   | (Valid %)     | (20.1%)                         | (23.2%)                            | <b>(22.5%)</b>                |
|   | <b>Avg. #</b> | <b>1.85</b>                     | <b>1.72</b>                        | <b>1.74</b>                   |
| Children 18 years and older                                 | Valid N       | 5,745                           | 28,668                             | <b>34,413</b>                 |
|   | (Valid %)     | (11.0%)                         | (16.6%)                            | <b>(15.3%)</b>                |
|   | <b>Avg. #</b> | <b>1.63</b>                     | <b>1.55</b>                        | <b>1.57</b>                   |

Note: \* Results were based on respondents who reported the number of children and had at least one child living in the household. The average number of children living in the household was based on the valid number of respondents, excluding '0'.



## 11. Demographic Characteristics of Respondents (cont'd)

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b>       | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Education</b>                              |                                 |                                    |                               |
| Some school                                   | 3.1%                            | 0.5%                               | <b>1.1%</b>                   |
| High school diploma                           | 9.5%                            | 9.5%                               | <b>9.5%</b>                   |
| Some post-secondary                           | 8.2%                            | 9.4%                               | <b>9.1%</b>                   |
| Graduated community/technical college         | 27.5%                           | 26.1%                              | <b>26.4%</b>                  |
| Graduated university (undergraduate)          | 23.0%                           | 26.4%                              | <b>25.6%</b>                  |
| Post graduate degree/Professional designation | 28.8%                           | 28.1%                              | <b>28.3%</b>                  |
| <b>Employment Status</b>                      |                                 |                                    |                               |
| Working full time                             | 45.1%                           | 46.5%                              | <b>46.2%</b>                  |
| Working part time or seasonally               | 6.3%                            | 7.3%                               | <b>7.1%</b>                   |
| Unemployed                                    | 1.5%                            | 0.9%                               | <b>1.0%</b>                   |
| Retraining or upgrading                       | 0.1%                            | 0.2%                               | <b>0.2%</b>                   |
| Retired                                       | 42.4%                           | 40.5%                              | <b>40.9%</b>                  |
| Homemaker                                     | 1.4%                            | 1.2%                               | <b>1.2%</b>                   |
| Student                                       | 0.7%                            | 1.8%                               | <b>1.5%</b>                   |
| Other   | 2.5%                            | 1.7%                               | <b>1.9%</b>                   |



## 11. Demographic Characteristics of Respondents *(cont'd)*

|   | Culture-oriented Travel Parties | Accidental Cultural Travel Parties | Total Cultural Tourism Market |
|---|---------------------------------|------------------------------------|-------------------------------|
| <b>Overnight Pleasure Parties N (%)</b> | <b>52,442 (12.7%)</b>           | <b>172,848 (76.7%)</b>             | <b>225,290 (100.0%)</b>       |
| <b>Annual Household Income</b>          |                                 |                                    |                               |
| Under \$40,000                          | 8.0%                            | 7.4%                               | <b>7.5%</b>                   |
| \$40,000 to \$59,999                    | 17.1%                           | 11.5%                              | <b>12.8%</b>                  |
| \$60,000 to \$79,999                    | 11.9%                           | 14.1%                              | <b>13.6%</b>                  |
| \$80,000 to \$99,999                    | 12.3%                           | 13.8%                              | <b>13.4%</b>                  |
| \$100,000 to \$124,999                  | 13.2%                           | 13.5%                              | <b>13.4%</b>                  |
| \$125,000 to \$149,999                  | 11.8%                           | 8.3%                               | <b>9.1%</b>                   |
| \$150,000 to \$174,999                  | 6.0%                            | 7.7%                               | <b>7.3%</b>                   |
| \$175,000 to \$199,999                  | 3.0%                            | 4.6%                               | <b>4.2%</b>                   |
| \$200,000 or more                       | 6.6%                            | 10.4%                              | <b>9.5%</b>                   |
| Not Stated                              | 10.0%                           | 8.7%                               | <b>9.0%</b>                   |

