

A PROFILE OF CRUISE SHIP TRAVELLERS TO PEI

- Results from the 2023 PEI Travel Survey
of Cruise Ship Passengers -

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Courtesy photos from
Charlottetown' Harbour
Authority Inc.'s official
website

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Executive Summary

Executive Summary



- A travel survey of cruise ship passengers is a tool used to measure the impact of cruise ship passengers on a destination and to profile these visitors.
- In 2023, a travel survey of cruise ship passengers was conducted in Prince Edward Island (PEI). The main purposes of the 2023 Prince Edward Island (PEI) travel survey of cruise ship passengers were to provide a full range of statistics on the volume of cruise ship passengers to PEI and profile detailed characteristics of their visits.
- The sampling frame was collected via online surveys by using email addresses for cruise ship passengers collected at the Charlottetown Harbour from April 26 to November 4, 2023 (3,424 email addresses for online survey). In total, **1,105 samples** were finally used for further analysis of the 2023 PEI cruise travel study.
- The final data for the analysis was prepared through processes such as error detection, data imputation, and bias adjustment, and weighting techniques were used in the estimation process attempt to reduce the effect of biases and were also performed to determine aggregate cruise ship passenger parties' characteristics. In terms of statistical accuracy, a sample of this size has a sampling error of **±2.91** percent at a 95 percent confidence level.

Executive Summary (cont'd)



- In 2023, a total of **119,488 cruise ship passengers** aboard **89 cruise ships** visited PEI. On average, cruise ship passenger travel parties consisted of 2.78 people. Nearly all parties were comprised of only adults. It was estimated that **42,961 cruise travel parties** visited PEI in 2023.
- Overall, 65 percent of cruise travel parties were from the United States while 22 percent were from another country and 13 percent were from Canada.
- Over half of cruise parties (58.6%) travelled with their spouse or partner, about 10 percent travelled with other family members (e.g., sister, brother, grandparents, etc.), and 8 percent travelled with one or more couples.
- Nearly 68 percent of parties were comprised of two adults and 25 percent of parties were comprised of three or more adults. Only 2 percent of parties included children.
- About 81 percent of parties were comprised of adults who were aged 55 and over while 3 percent of parties were comprised of adults between the ages of 35 and 54 and 13 percent of parties consisted of travellers of various age generations. Less than one percent of parties were comprised of millennials (aged 18 to 34).

Executive Summary (cont'd)



- About 56 percent of individual cruise ship passengers were female. Nearly eighty-six percent of passengers were aged 55 or older, with 65 to 74 years old representing 46 percent of cruise ship visitors to PEI in 2023.
- Approximately 19 percent of cruise travel parties had previously visited PEI, the majority had not visited recently. More than two-thirds of repeat parties (68.5%) had last visited PEI in 2018 or earlier, about 19 percent of repeat parties had last visited PEI in 2019, and 4 percent had last visited PEI in 2022.
- About 54 percent of cruise ship passengers took an organized shore excursion while they were in port in PEI. The majority (79.2%) of those who took a shore excursion booked the excursion before they left their home to travel to the ship's departure port. About 11 percent booked the excursion after they boarded the cruise ship and 10 percent did not book the excursion in advance of their arrival in PEI.
- About 87 percent of those who pre-booked the shore excursion did so through the cruise ship provider while 9 percent booked the excursion directly with the excursion provider. The remainder (3.9%) booked the excursion through other means such as a travel agent.

Executive Summary (cont'd)



- The most popular types of means of transportation used for organized shore excursions were tour bus, walking, mini-bus or van, and horse carriage.
- Aside from shore excursions, cruise travellers participated in a variety of activities while in PEI. The most popular activity among cruise ship passengers was shopping for local products (crafts, souvenirs and/or antiques). About 52 percent of cruise ship passengers took part in this activity.
- Other popular activities included:
 - Walking and hiking, sampling local culinary products, visiting historical and cultural attractions,
 - Sightseeing, appreciating pastoral or rural settings, visiting Founder's Food Hall,
 - Shopping for general merchandise, going to a full-service restaurant,
 - Visiting Anne of Green Gables and/or Lucy Maud Montgomery attractions,
 - Driving tour (scenic drives/views) and seeing natural wonders.

Executive Summary (cont'd)



- The majority of cruise travellers to PEI indicated that the following ***cruise related factors*** were relatively, importantly considered in choosing or booking a cruise to Canada-New England:
 - Itineraries of the Canada-New England cruise;
 - Ports (cities/towns/destinations) included in the cruise;
 - Timing (season, month, date) of travel by the Canada-New England cruise; and
 - The cruise is suitable for my travel party (family, friends, etc.).
- In addition, the majority of cruise ship passengers indicated that the following ***destinations/ports related factors*** were relatively, importantly considered in choosing or booking a cruise to Canada-New England:
 - Beautiful scenery and landscapes;
 - Destination ports are safe places;
 - Touring multiple destinations;
 - Natural wonders and attractions; and
 - Historic/heritage sites, or cultural attractions.

Executive Summary (cont'd)



- Total estimated direct expenditures by cruise ship passengers to PEI in 2023 totalled more than ***\$16.5 million***.
- The items that accounted for the greatest proportion of direct expenditures were organized shore excursions (\$8.3 million or 50.2% of total expenditures), shopping (\$4.1 million, or 24.7%), and restaurants and bars (\$2.3 million, 13.9%).
- On average, cruise ship passengers spent ***\$138.35 per person per day*** and ***\$384.79 per party per day*** while in PEI.
- Excluding spending on organized shore excursions, cruise travellers to PEI in 2023 spent an average of \$68.84 per person per day while average spending per party per day was \$191.48.
- The vast majority of cruise travellers to PEI indicated they were pleased with various aspects of their visit to PEI. In particular, cleanliness and sanitary conditions at the port, restaurants, attractions, etc., safety and security in Charlottetown, PEI, welcome provided to cruise ship passengers, quality of customer service, and quality of port facilities were rated highly by cruise ship passengers.

Executive Summary (cont'd)



- About 89 percent of cruise ship passengers agreed that their time spent in Charlottetown and PEI was excellent and they were satisfied with their time in PEI and 86 percent agreed that their trip to PEI was good value for money spent.
- Nearly 92 percent of cruise travellers agreed they would recommend PEI as a travel destination to others and 87 percent agreed they would visit PEI again.
- Overall, only 4.3 percent of cruise travel parties indicated they experienced a problem or had a complaint that would impact their decision to visit PEI in the future or deter them from recommending PEI as a travel destination to others.
- The majority of cruise travellers to PEI indicated that the following ***motivation factors were important to return to vacation in PEI in the future:***
 - More to see & do, places/towns, and people/residents;
 - Beauty, food & beverage, scenery, more time, Island, clean, and cruise related;
 - PEI/Charlottetown, friendly, family/relatives/friends, Anne of Green Gables, activities, safe, and heritage/historic.

1. Introduction

1-1. Study Background (4)

1-2. Study Purpose (5)

1-1. Study Background

- A travel survey of cruise ship passengers is a tool used to measure the impact of cruise ship passengers on a destination and to profile these visitors.
- This survey can capture demographic information of visitors and trip characteristics such as the ages of visitors, travel party size, activities participated in, expenditures, trip evaluation, and future travel behaviours.
- For Prince Edward Island (PEI), a travel survey of cruise ship passengers was originally developed as a supplement to the year-long PEI visitors exit survey that is conducted periodically. The 2018-2019 PEI visitor exit survey was conducted from July 1, 2018 to June 30, 2019 to update existing historical information about visitors to PEI.
- The PEI travel survey of cruise ship passengers were also conducted in 2010, 2014, 2019, and 2023 for the same purposes to update existing historical information about cruise ship passengers.
- The 2023 travel survey of cruise ship passengers was conducted from April 26 to November 4 for 65 of the 89 ships.
- More details about the methodology of the 2023 PEI travel cruise ship passengers are provided in Chapter 2.

1-2. Study Purpose

- The main purpose of the 2023 PEI cruise ship passenger survey was to provide a full range of statistics on the volume of cruise ship passengers to PEI and detailed characteristics of their visits such as travel party size, ages of visitors, activities and shore excursions participated in, expenditures, and trip evaluation.
- The study pursued five broad objectives:
 - To update existing historical information on cruise ship passengers and crew arrivals to PEI.
 - To gather information regarding cruise ship traveller behaviours.
 - To identify key market segments of cruise ship travellers to PEI.
 - To enhance our knowledge and understanding of tourism (in general, and for PEI).
 - To collect critical data to measure the overall importance of tourism in PEI.

2. Methodology

2-1. Sampling Procedure (7)

2-2. Survey Statistics (8)

2-3. Data Processing and Weighting (11)

2-4. Survey Instrument (14)

2-1. Sampling Procedure

Target Population

- The target population was cruise ship passengers who arrived at the Charlottetown port during the 2023 cruise ship season (April to November).
- It was agreed that the surveys would be conducted online through an email request. Email addresses for cruise ship passengers were randomly collected for 64 ships from April 26 to November 4, 2023. Hired survey staff stayed at the Charlottetown Harbour to talk to passengers and seek their participation in the survey. If a passenger agreed to participate in the survey, their name, email address, place of residence and gender were recorded.
- The target population did not include cruise ship crew.

Online Survey

- The survey was emailed to selected passengers of 64 groups to complete the online survey of the 2023 cruise ship. Each group received emails reminding them to complete the survey.
- Responding to the survey was voluntary.

2-2. Survey Statistics

Survey Invitation and Samples

- As presented in Table 1, in total, 3,424 email addresses were invited to cruise ship passengers and 1,316 surveys were collected.
- Of these, 1,105 surveys were finally used for further analysis. This represents a collection rate of 38.4 percent based on total number of email addresses collected and a use rate of 84.0 percent based on all collected samples as presented.
- Eighty-nine cruise ships arrived in Charlottetown during 2023. Of these, surveys were distributed to passengers of 65 cruise ships, resulting in a survey conduct rate of 66.7 percent of total cruise ships.

Sample Size and Margin of Error

- In terms of statistical accuracy, the actual margin of error for each segment will vary due to variations in the sample size.
- As shown in Table 2, overall, a sample of this size has a sampling error of **±2.91** percent at a 95 percent confidence level, though the margins of error for the three sub-groups of seasons are higher (April-May = ±11.93%; June-August = ±6.98%; and September-November = ±3.32).
- Note that this is a guideline only. The same caution should be applied when interpreting significance testing throughout this report.

2-2. Survey Statistics (cont'd)

Table 1: Summary of Cruise Ship Surveys, Survey Statistics, and Samples by Month

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Total
Cruise Ship Arrivals									
Total Number of Cruise Ship Arrivals	1	11	6	4	7	28	29	3	89
(% of total cruise ships)	(13.8%)	(13.8%)	(14.9%)	(13.8%)	(14.9%)	(37.9%)	(32.2%)	(1.1%)	(100.0%)
Number of Cruise Ships Surveyed	1	5	4	4	5	21	22	3	65
(% of cruise ships surveyed)	(1.5%)	(7.7%)	(6.2%)	(6.2%)	(7.7%)	(32.3%)	(33.8%)	(4.6%)	(100.0%)
Survey Conduct Rate (of all surveyed cruise ships)	100.0%	45.5%	66.7%	100.0%	71.4%	75.0%	75.9%	100.0%	73.0%
Sampling Frame and Samples									
Total Number of Email Addresses Collected, Invited	45	167	140	161	283	1,258	1,270	100	3,424
(% of email addresses collected)	(1.3%)	(4.9%)	(4.1%)	(4.7%)	(8.3%)	(36.7%)	(37.1%)	(2.9%)	(100.0%)
Number of Survey Samples Collected	25	56	62	64	104	518	454	33	1,316
(% of survey samples collected)	(1.9%)	(4.3%)	(4.7%)	(4.9%)	(7.9%)	(39.4%)	(34.5%)	(2.5%)	(100.0%)
Collection Rate (of all surveys invited)	55.6%	33.5%	44.3%	39.8%	36.7%	41.2%	35.7%	33.0%	38.4%
Number of Survey Samples Used ^{a)}	21	49	45	55	88	433	383	31	1,105
(% of survey samples used)	(1.9%)	(4.4%)	(4.1%)	(5.0%)	(8.0%)	(39.2%)	(34.7%)	(2.8%)	(100.0%)
Use Rate (of all collected samples)	84.0%	87.5%	72.6%	85.9%	84.6%	83.6%	84.4%	93.9%	84.0%
Samples Weighted ^{b)}	535	2,479	1,992	2,014	3,631	14,854	16,199	1,257	42,961
(% of samples weighted)	(1.2%)	(5.8%)	(4.6%)	(4.7%)	(8.5%)	(34.6%)	(37.7%)	(2.9%)	(100.0%)

Note: ^{a)} and ^{b)} Samples were weighted to align with the total target population (estimated cruise ship passenger travel parties) by month. Weighting scores were calculated by using a mix of the number of cruise ship passengers by month, passenger emails and survey data. Further analyses are based on the total estimated number of cruise ship travel parties (Total $n = 42,961$). These parties represent 119,488 individual cruise ship travellers.

2-2. Survey Statistics (cont'd)



Table 2: Sample Size and Margin of Error

	Sample Size	Margin of Error ^{a)}
By Season		
April - May	66	±11.93
June - August	192	±6.98
September - November	847	±3.32
By Origin		
Canada	163	±7.57
United States	742	±3.55
Other	200	±6.86
Total	1,105	±2.91

Note: ^{a)} Margin of error indicates % of total number of cruise ship travel parties used in each sub-group at the 95% confidence level.

2-3. Data Processing and Weighting

Data Processing and Error Detection

- This study of PEI cruise ship passengers involved many steps of data processing.
- All online survey data were reviewed to determine if they were complete and coherent.
- Electronic verifications were also made to identify any outliers and to correct them.
- Statistical reliability and validity tests, and consistency controls were conducted during this process.

Data Imputation

- For the 2023 PEI travel survey of cruise ship passengers, some data was imputed. For example, missing travel party size and/or total trip spending were imputed if the remainder of the fields on the questionnaire was valid.
- Total imputation was carried out for all the factors above and for strata that were outside the scope of the questionnaire distribution.
- Total imputation was also performed for any in-scope factors that received an insufficient number of surveys for some specific segments to meet minimum requirements (combination of minimum number of questionnaires and maximum weight) based on the monthly cruise ship passenger counts.

2-3. Data Processing and Weighting (cont'd)

Bias Adjustment and Weighting the Sample

- For estimation purposes, the responses obtained through the questionnaires must be treated as a simple random sample from the total cruise ship arrivals in each stratum (by month).
- The data may be subject to some degree of “distribution bias” due to the fact that not all categories of cruise ships and passengers are represented in the distribution or to a “non-response bias” due to the fact that the individuals replying may not be representative of the cruise ship traveller population.
- Weighting techniques were used in the estimation process attempt to reduce the effect of biases and were also performed to determine aggregate cruise ship passenger parties’ characteristics. Therefore, using the calculated weights, estimates can be obtained for a variety of cruise ship traveller characteristics. These estimates take the form of totals, averages and percentages, and can be obtained at different levels.
- For this report, the final survey sample was weighted by month (April to November for the 2023 cruise ship season) to align it with the total cruise ship passenger parties.

2-3. Data Processing and Weighting (cont'd)

- Weighting factors were calculated by using a mix of actual cruise ship data provided by the Charlottetown Harbour Authority Inc. and results obtained from the online surveys.
- According to the data of cruise ship arrivals and information from the 2023 PEI travel survey of cruise ship passengers, it was estimated that 42,961 cruise ship passenger travel parties (based on 119,488 individual cruise ship travellers) arrived at the Charlottetown port during the 2023 cruise ship season.
- These figures were used to weight the survey data by month and adjust the survey results. Therefore, results in this report are based on the weighting values rather than on the raw scores of the sample.
- However, note that results may not reflect all actual responses of each party or individuals in the party because the application of the weighting scheme was based only on the number of passenger parties by cruise ship arrival months, not based on all survey questions.

2-4. Survey Instrument

- The PEI cruise ship passenger survey gathers information on the travel habits of cruise ship passengers visiting the province. Below is a list of information available from the questionnaire:
 - Usual place of residence (country, province/state, postal code/zip code, city)
 - Travel party size
 - Age and gender composition of travel party
 - Participation in organized shore excursion(s), method of booking, cost of excursion, type of transportations used for excursion, and satisfaction with the excursion
 - Participation in other activities while in PEI
 - Total expenditures in PEI, including six categories of spending such as food and beverage at restaurants and bars, food and beverage at stores, shopping, recreation and entertainment, car rentals and local transportation, and other
 - Evaluation of trip in PEI
 - Previous visitation to PEI
 - Intentions to revisit PEI
 - Instance of problems or complaints
 - Demographic information
 - Respondents' comments

3. CRUISE MARKET TRENDS

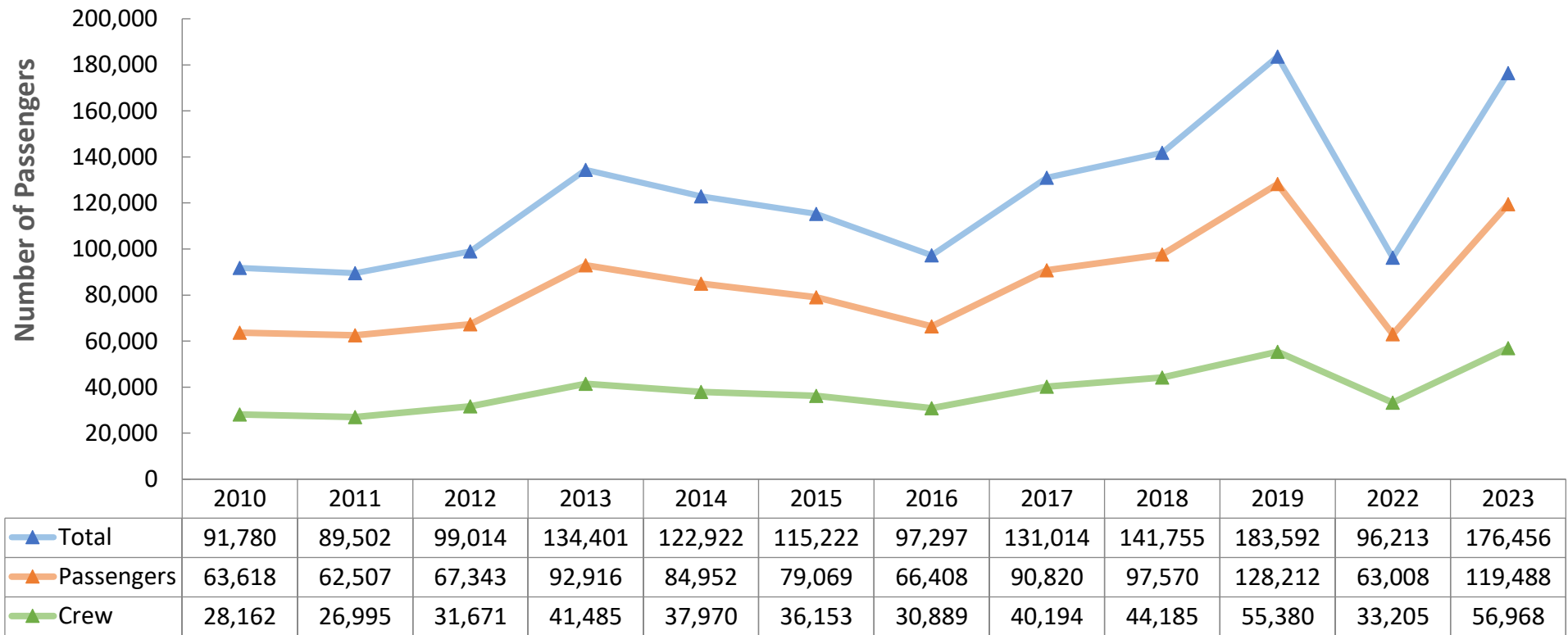
3-1. Trends in Cruise Ship Arrivals at Charlottetown (16)

3-2. Summary of Past Survey Results (17)

3-1. Trends in Cruise Ship Arrivals at Charlottetown



Figure 1
Trends in Cruise Ship Passenger and Crew Arrivals at Charlottetown



Data source: Charlottetown Harbour Authority Inc.; No cruise ship arrivals in 2020 and 2021 due to the COVID-19 Pandemic.

3-2. Summary of Past Cruise Survey Results



Table 3: Overview of Visitation and Summary of Past Cruise Survey Results

	2007	2008	2010	2014	2019	2023	% Change over 2019
Number of Ships ^{a)}	15	36	42	64	87	89	+2.3%
Number of Passengers ^{a)}	19,358	57,236	63,618	84,952	128,212	119,488	-6.8%
Number of Crew ^{b)}	8,882	25,730	28,162	37,970	55,380	56,968	+2.9%
Number of Passenger Travel Parties ^{c)}	7,934	23,950	23,568	29,852	45,126	42,961	-4.8%
Average Passenger Travel Party Size ^{c)}	2.44	2.45	2.70	2.85	2.84	2.78	-2.1%
Average Spending per Person per Day ^{c)*}	\$39.04	\$50.27	\$75.75	\$88.43	\$114.46	\$138.35	+20.9%
Average Spending per Party per Day ^{c)*}	\$95.14	\$123.20	\$204.49	\$251.66	\$325.20	\$384.79	+18.3%
Total Estimated Direct Expenditures ^{c)*}	\$755,732	\$2,949,750	\$4,819,345	\$7,512,550	\$14,674,910	\$16,531,132	+12.6%

Note: ^{a)} Actual numbers were provided by the Charlottetown Harbour Authority Inc.

^{b)} Crew members were not considered for further analysis in this report.

^{c)} Estimated numbers were based on the results of each year of the Prince Edward Island travel survey of cruise ship passengers.

* Due to differences in the expenditure questions in the survey between 2007/2008 and 2010/2014/2019/2023, expenditure results for 2007 and 2008 should not be compared with 2010, 2014, 2019, or 2023; Total estimated direct expenditures were calculated as follows: number of passengers × average spending per person *or* number of passenger travel parties × average spending per party.

4. Key Indicators of Cruise Ships during the 2023 Season

Table 4: Key Indicators of Cruise Ship Arrivals and Passengers during the 2023 Season

	Apr-May	Jun-Aug	Sep-Nov	Total
Statistics of Cruise Ship Arrivals to Charlottetown in 2023 ^{a)}				
Total Number of Cruise Ship Arrivals	12	17	60	89
(% of cruise ship arrivals)	(13.5%)	(19.1%)	(67.4%)	(100.0%)
Total Number of Cruise Ship Passengers	8,339	22,865	88,284	119,488
(% of cruise ship passengers)	(7.0%)	(19.1%)	(73.9%)	(100.0%)
Estimated Cruise Ship Passenger Travel Parties ^{b)}				
Average Party Size	2.78	2.99	2.73	2.78
Estimated Number of Cruise Ship Travel Parties	2,900	7,751	32,310	42,961
(% of cruise ship travel parties)	(6.8%)	(18.0%)	(75.2%)	(100.0%)
Estimated Expenditures ^{b)}				
Average Spending per Person per Day	\$142.29	\$154.16	\$133.88	\$138.35
Average Spending per Party per Day	\$395.17	\$460.38	\$365.82	\$384.79
Estimated Total Direct Expenditures	\$1,186,586	\$3,524,797	\$11,819,749	\$16,531,132

Note: ^{a)} Information about the number of cruise ship arrivals and passengers in each month was provided by the Charlottetown Harbour Authority Inc.

^{b)} Estimates were based on the results of the 2023 Prince Edward Island travel survey of cruise ship passengers.

5. Who Visits PEI

5-1. Origin of Cruise Travel Parties (21)

5-2. Party Composition (23)

5-3. Age Composition (25)

5-4. Party Size (26)

5-5. Gender of Individual Cruise Travellers (27)

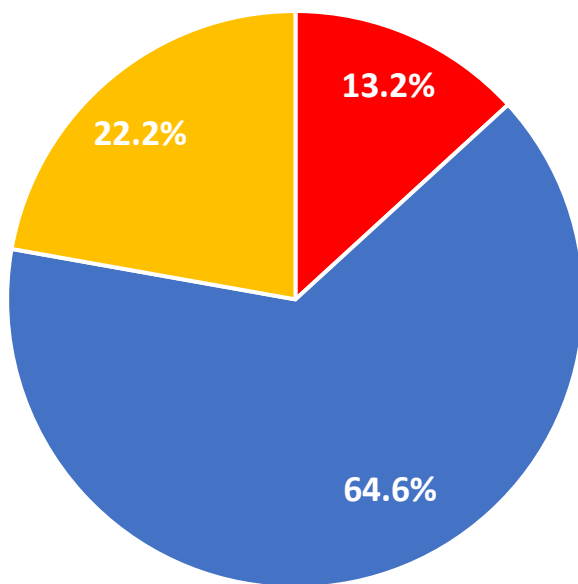
5-6. Age of Individual Cruise Travellers (28)

5-7. Type of Visitation and Repeat Visit Pattern (29)

5-1. Origin of Cruise Travel Parties

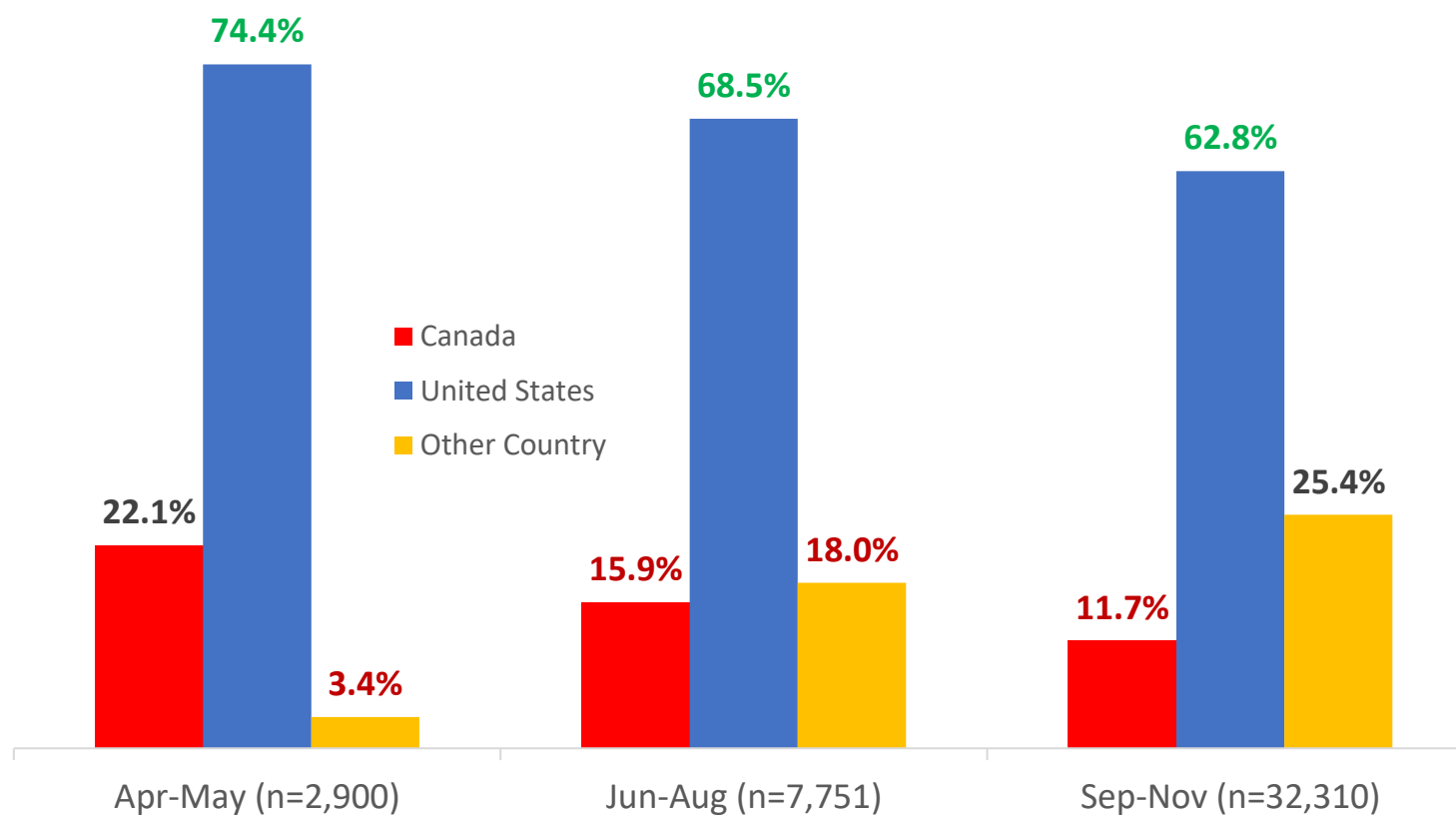
Figure 2
Country of Cruise Travel Parties

Total N = 42,961 Parties



- Canada (n=5,665)
- United States (n=27,771)
- Other Country (n=9,525)

Figure 3
Country of Cruise Travel Parties by Season



Note: **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-1. Origin of Cruise Travel Parties (cont'd)

Table 5: Origin of Cruise Travel Parties by Season

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Canada	22.1%	15.9%	11.7%	13.2%
Alberta	5.2%	1.4%	1.5%	1.8%
British Columbia	4.6%	4.9%	2.5%	3.1%
Manitoba & Saskatchewan	0.0%	0.0%	0.3%	0.2%
Ontario	7.1%	7.5%	4.7%	5.4%
Quebec	5.2%	2.2%	2.6%	2.7%
Rest of Canada	0.0%	0.0%	0.1%	0.1%
United States	74.4%	68.5%	62.8%	64.6%
New England	4.2%	8.9%	3.0%	4.1%
Middle Atlantic	7.4%	4.5%	6.8%	6.4%
South Atlantic	32.0%	16.8%	18.1%	18.8%
East North Central	2.1%	9.8%	7.0%	7.2%
West North Central	3.2%	4.3%	3.5%	3.6%
East South Central	4.2%	4.6%	1.6%	2.3%
West South Central	6.4%	6.6%	7.7%	7.4%
Mountain	3.2%	5.9%	6.6%	6.2%
Pacific, Alaska & Hawaii	11.7%	7.2%	8.6%	8.5%
Other country	3.4%	15.5%	25.4%	22.2%
European countries	1.5%	8.1%	23.0%	18.8%
Other countries	2.0%	7.5%	2.5%	3.3%

Note: The data was not weighted by origin information of actual passengers so the results may not reflect the actual origin of cruise ship passengers; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-2. Party Composition

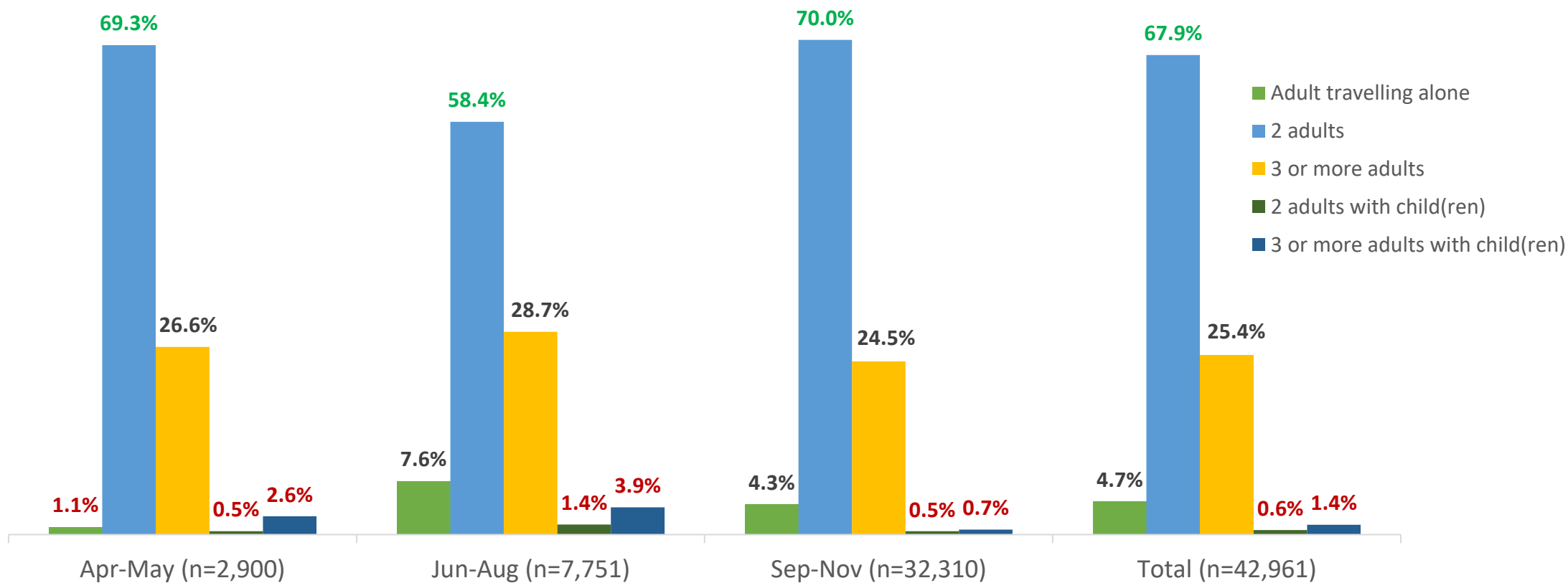
Table 6: Party Composition by Season

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
By myself/alone	1.1%	7.6%	4.3%	4.7%
With my spouse/partner only (2 people)	53.4%	48.5%	61.5%	58.6%
With one or more couples	2.4%	7.9%	8.0%	7.6%
As a family (including children under 18)	1.8%	4.1%	0.6%	1.3%
As a family (with no one under 18)	11.8%	8.1%	2.5%	4.2%
With other family/families (including children under 18)	0.0%	1.1%	0.4%	0.5%
With other family members (e.g., sister, brother, grandparents)	13.1%	9.7%	9.2%	9.6%
With friends	10.8%	5.4%	6.7%	6.7%
With family and friends	3.4%	4.2%	5.6%	5.2%
Other	2.1%	3.3%	1.1%	1.6%

Note: '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-2. Party Composition (cont'd)

Figure 4
Party Composition by Season

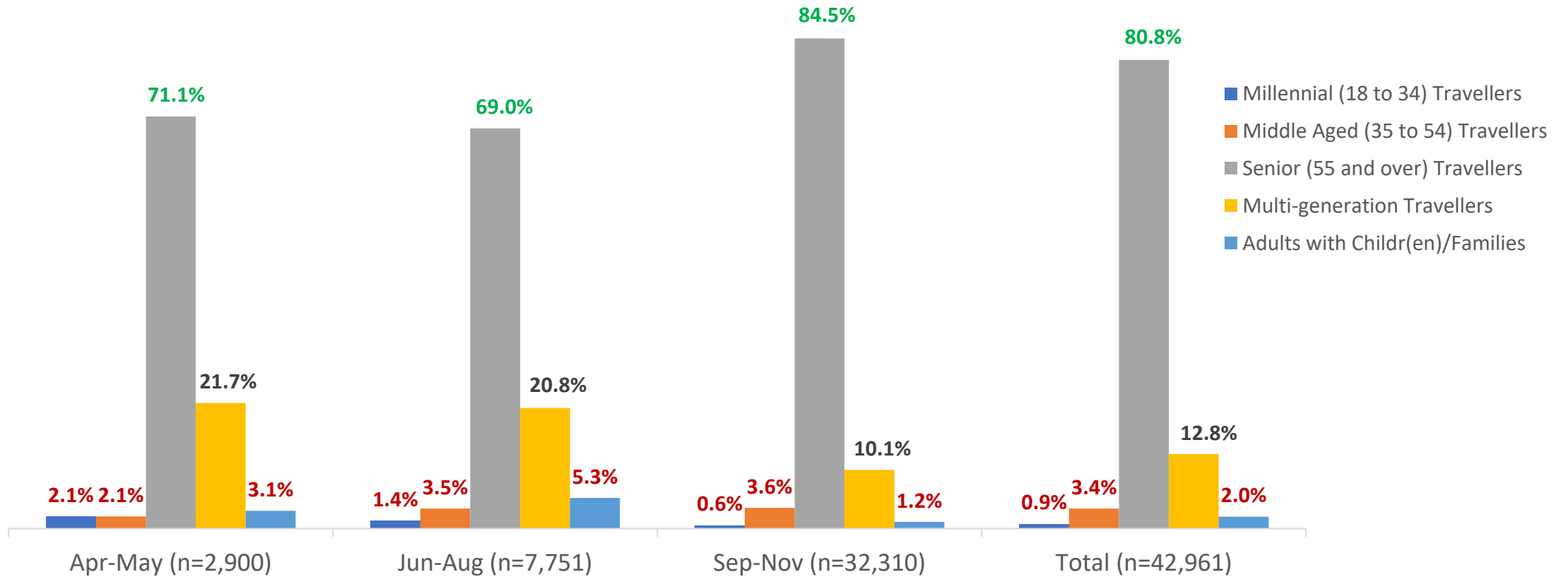


Note: **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-3. Age Composition



Figure 5
Age Composition by Season



Note: **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-4. Party Size

Figure 6
Average Party Size by Season

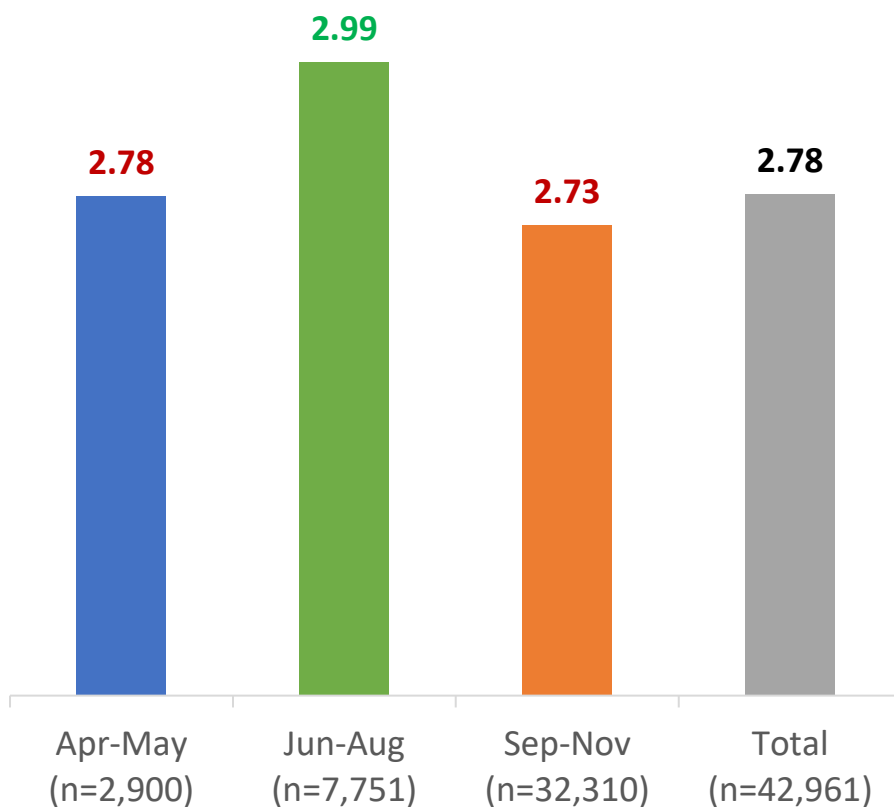


Table 7: Average Party Size by Season

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Average Party Size	2.78	2.99	2.73	2.78
Avg. Number of Male	1.27	1.27	1.22	1.23
Avg. Number of Female	1.50	1.72	1.52	1.55
Avg. Number of Children	0.06	0.11	0.02	0.04
Avg. Number of Adults	2.72	2.88	2.72	2.74

Note: **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-5. Gender of Individual Cruise Travellers

Figure 7
Gender of Individual Cruise Travellers

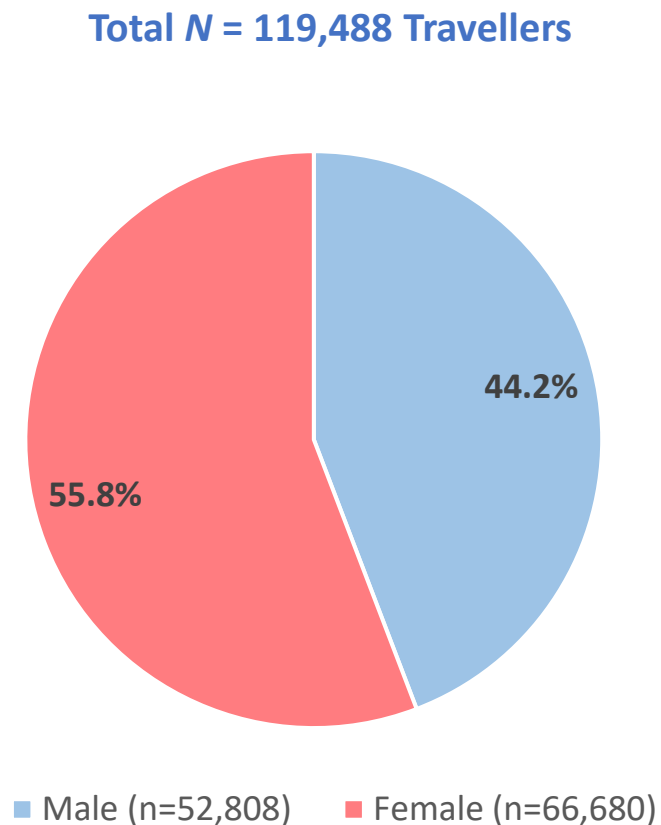
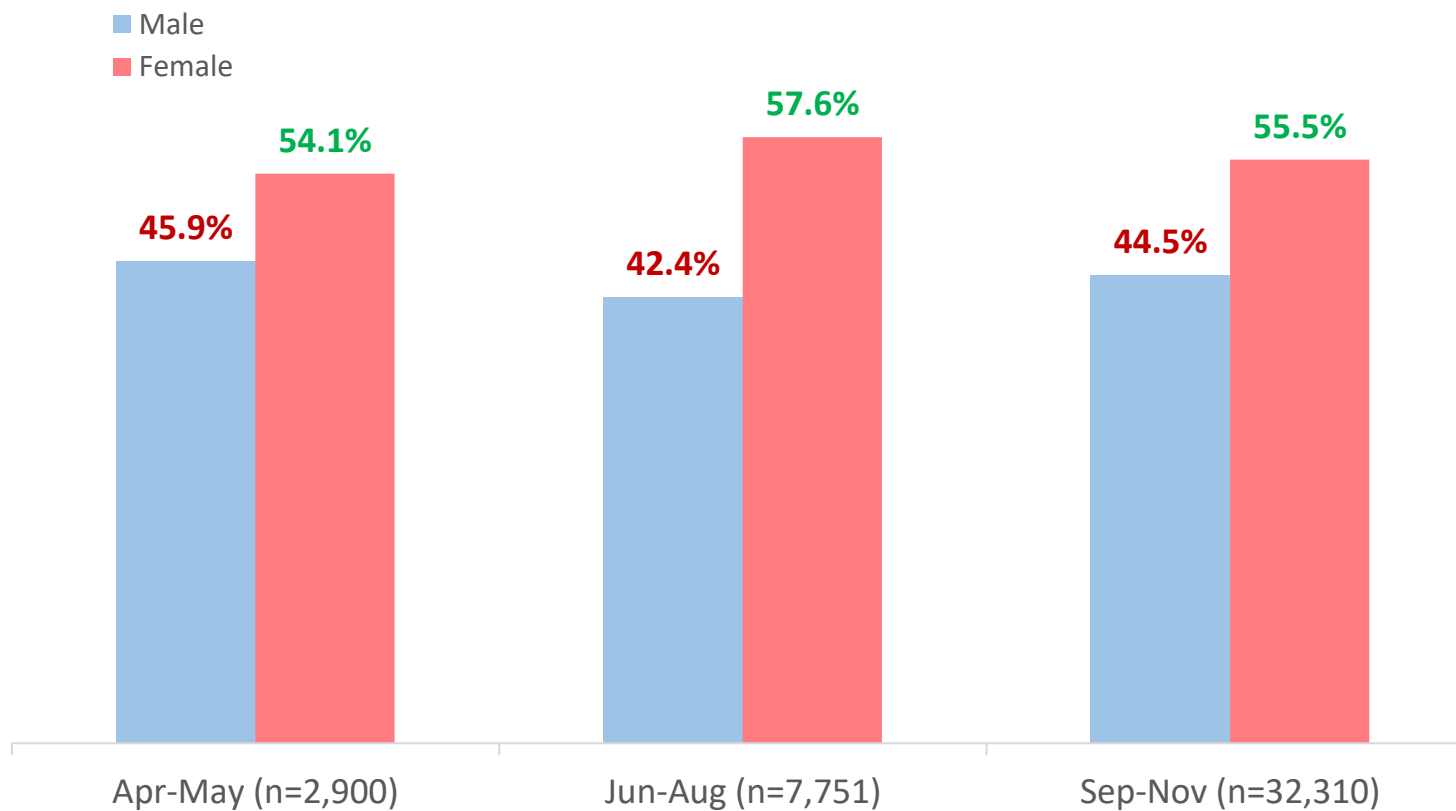


Figure 8
Gender of Individual Cruise Travellers by Season



Note: **Green Bold Number** indicates significantly higher than another group at 95% confidence level, **Red Bold Number** indicates significantly lower than another group.

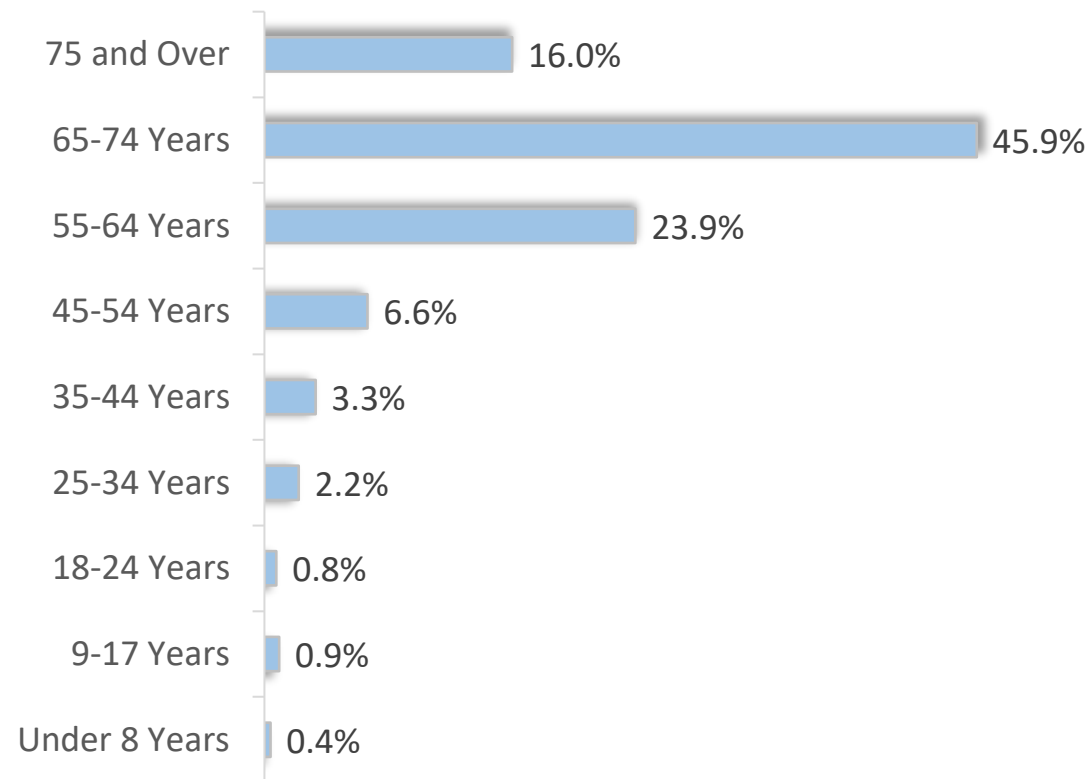
5-6. Age of Individual Cruise Travellers

Table 8: Age of Individual Cruise Travellers by Season

	Apr-May (n=8,339; 7.0%)	Jun-Aug (n=22,865; 19.1%)	Sep-Nov (n=88,284; 73.9%)	Total (n=119,488; 100.0%)
Under 8 Years	1.9%	0.2%	0.3%	0.4%
9 – 17 Years	0.2%	3.5%	0.3%	0.9%
18 – 24 Years	2.5%	2.4%	0.2%	0.8%
25 – 34 Years	9.2%	2.6%	1.5%	2.2%
35 – 44 Years	6.2%	5.4%	2.5%	3.3%
45 – 54 Years	4.8%	11.2%	5.6%	6.6%
55 – 64 Years	31.8%	21.0%	23.9%	23.9%
65 – 74 Years	29.8%	37.1%	49.7%	45.9%
75 Years and over	13.7%	16.6%	16.0%	16.0%

Figure 9

Age of Individual Cruise Travellers



Note: **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

5-7. Type of Visitation and Repeat Visit Pattern



Figure 10
Type of Visitation by Season

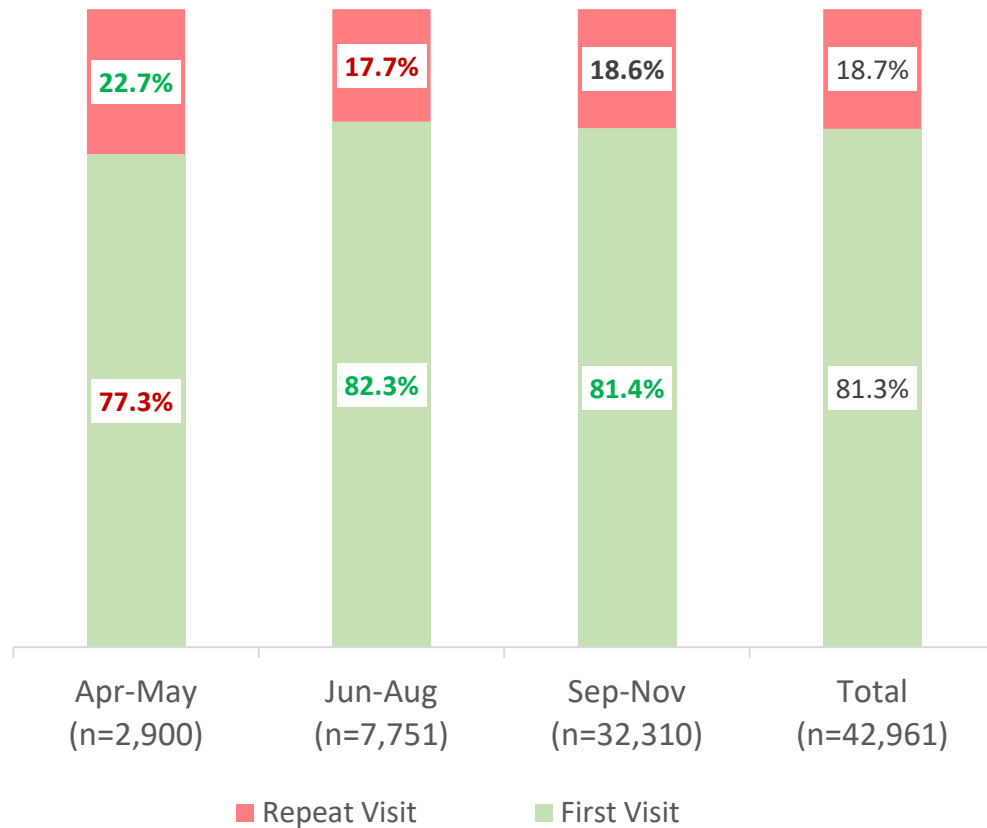


Table 9: Repeat Travel Parties' Most Recent Trip to PEI by Season

	Apr-May (n=2,659; 8.2%)	Jun-Aug (n=1,369; 17.0%)	Sep-Nov (n=6,020; 74.8%)	Total (n=8,048; 100.0%)
Most Recent Trip to PEI				
This year (2023)	0.0%	2.2%	4.3%	3.6%
One year ago (2022)	3.1%	6.3%	3.8%	4.1%
Two years ago (2021)	0.0%	0.0%	2.3%	1.7%
Three years ago (2020)	5.0%	7.6%	1.8%	3.0%
Four years ago (2019)	18.4%	13.7%	20.3%	19.0%
Five or more years ago (2018 & earlier)	73.6%	70.2%	67.6%	68.5%
Average Number of Times Visited PEI				
Average Number of Times Visited PEI for an Overnight Trip in the Past Five Years (excluding this cruise ship visit)	0.56	0.36	0.77	0.68
Average Number of Times Visited PEI by Cruise Ship Travel in the Past Years (excluding this cruise ship visit)	0.37	0.50	0.62	0.58

Note: '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups. **Green**

6. What Factors Cruise Travellers Importantly Consider

6-1. Important Factors or Reasons for Booking the Cruise (31)

6-2. Importance of Cruise related Factors (31)

6-3. Importance of Destinations/Ports related Factors (33)

6-1. Important Factors or Reasons for Booking the Cruise

Key Themes

The following key themes about *important factors or reasons to consider when booking the cruise to Canada-New England* were summarized by Artificial Intelligence.

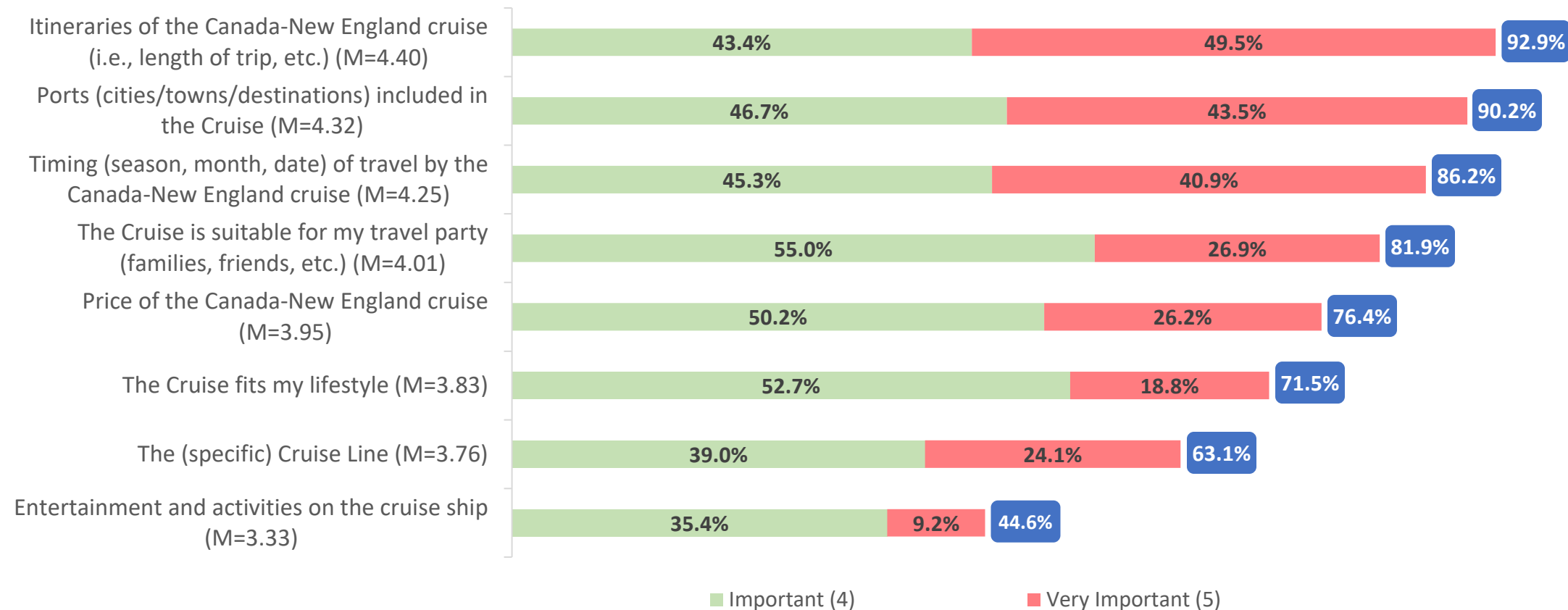
- 1) Desire to see new places
- 2) Appreciation of scenery and nature
- 3) Cruise experience and ports
- 4) Seasonal preferences
- 5) Historical and cultural interest
- 6) Affordability and value for money
- 7) Convenience and accessibility
- 8) Family and social factors
- 9) Attractions and excursions
- 10) Safety and security
- 11) Positive perception of Canada
- 12) Local cuisine
- 13) Ease of leaving Boston
- 14) Time and duration

Base: 2,658 important factors or reasons from 1,062 respondents who reported at least one factor or reason to consider when booking the cruise to Canada-New England.

Note: Results were based on up to three responses to an open-ended question.

6-2. Importance of Cruise related Factors

Figure 12
Importance of Cruise related Factors



Base: All cruise travel parties (n=42,961)

Note: "Important" was for those who gave a rating of 4, while "Very Important" was for those who gave a rating of 5; M (mean values) were based on a five-point Likert-type scale (1=not at all important; 2=unimportant; 3=neither important nor unimportant; 4=important; and 5=very important).

6-2. Importance of Cruise related Factors (cont'd)

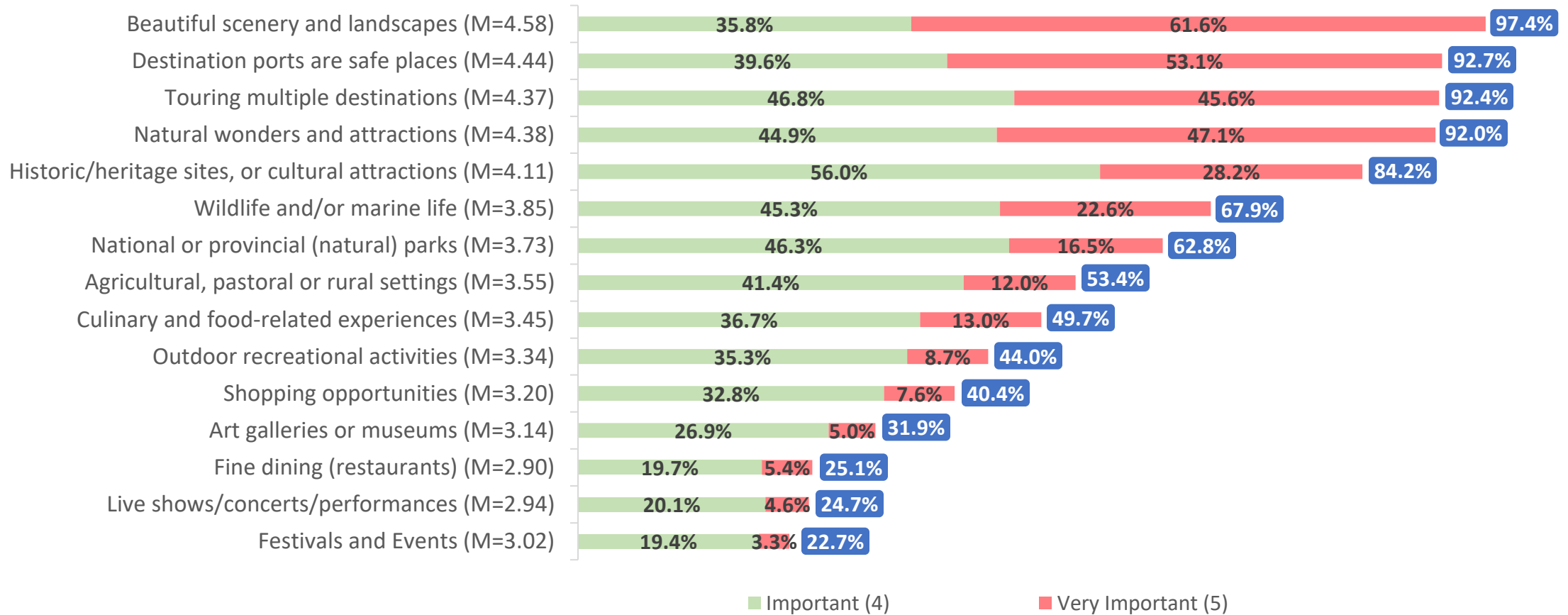
Table 10: Importance of Cruise related Factors by Season

	Apr-May (n=2,900; 6.8%)		Jun-Aug (n=7,751; 18.0%)		Sep-Nov (n=32,310; 75.2%)		Total (n=42,961; 100.0%)	
	Mean	%	Mean	%	Mean	%	Mean	%
Itineraries of the Canada-New England cruise (i.e., length of trip, etc.)	4.46	89.6%	4.39	86.6%	4.40	93.2%	4.40	91.8%
Ports (cities/towns/destinations) included in the Cruise	4.44	92.0%	4.32	83.5%	4.31	90.3%	4.32	89.1%
Timing (season, month, date) of travel by the Canada-New England cruise	3.79	66.3%	4.22	80.4%	4.29	88.1%	4.25	85.3%
The Cruise is suitable for my travel party (families, friends, etc.)	3.99	80.7%	4.03	80.7%	4.01	81.1%	4.01	81.0%
Price of the Canada-New England cruise	4.04	78.8%	3.93	73.3%	3.94	75.8%	3.95	75.5%
The Cruise fits my lifestyle	3.87	69.1%	3.79	67.5%	3.84	71.6%	3.83	70.7%
The (specific) Cruise Line	3.86	69.9%	3.67	55.3%	3.77	63.4%	3.76	62.4%
Entertainment and activities on the cruise ship	3.27	41.7%	3.28	37.9%	3.35	45.9%	3.33	44.1%

Note: While mean values were based on a five-point Likert-type scale (1=not at all important; 2=unimportant; 3=neither important nor unimportant; 4=important; and 5=very important), percentages (%) were based on those who gave a rating of 4 or 5; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

6-3. Importance of Destinations/Ports related Factors

Figure 13
Importance of Destinations/Ports related Factors



Base: All cruise travel parties (n=42,961)

Note: "Important" was for those who gave a rating of 4, while "Very Important" was for those who gave a rating of 5; M (mean values) were based on a five-point Likert-type scale (1=not at all important; 2=unimportant; 3=neither important nor unimportant; 4=important; and 5=very important).

6-3. Importance of Destinations/Ports related Factors (cont'd)

Table 11: Importance of Destinations/Ports related Factors by Season

	Apr-May (n=2,900; 6.8%)		Jun-Aug (n=7,751; 18.0%)		Sep-Nov (n=32,310; 75.2%)		Total (n=42,961; 100.0%)	
	Mean	%	Mean	%	Mean	%	Mean	%
Beautiful scenery and landscapes	4.69	95.4%	4.58	91.3%	4.58	97.5%	4.58	96.3%
Destination ports are safe places	4.48	91.2%	4.43	86.0%	4.44	93.0%	4.44	91.6%
Touring multiple destinations	4.31	84.8%	4.33	86.8%	4.38	93.0%	4.37	91.3%
Natural wonders and attractions	4.40	90.8%	4.40	85.3%	4.37	92.3%	4.38	90.9%
Historic/heritage sites, or cultural attractions	4.20	87.0%	4.19	80.0%	4.08	83.6%	4.11	83.2%
Wildlife and/or marine life	3.81	66.0%	3.92	66.6%	3.84	67.3%	3.85	67.1%
National or provincial (natural) parks	3.89	69.7%	3.74	61.9%	3.71	61.3%	3.73	62.0%
Agricultural, pastoral or rural settings	3.63	56.9%	3.58	52.8%	3.53	52.4%	3.55	52.8%
Culinary and food-related experiences	3.57	51.3%	3.45	45.0%	3.44	50.0%	3.45	49.1%
Outdoor recreational activities	3.47	47.3%	3.35	41.1%	3.33	43.8%	3.34	43.5%
Shopping opportunities	3.09	33.7%	3.16	39.2%	3.22	40.7%	3.20	39.9%
Art galleries or museums	3.30	37.3%	3.18	30.7%	3.12	31.2%	3.14	31.5%
Fine dining (restaurants)	2.72	23.6%	2.89	22.9%	2.91	25.4%	2.90	24.9%
Live shows/concerts/performances	2.71	17.9%	2.90	23.2%	2.97	25.4%	2.94	24.5%
Festivals and Events	2.71	11.0%	3.01	23.9%	3.05	23.1%	3.02	22.4%

Note: While mean values were based on a five-point Likert-type scale (1=not at all important; 2=unimportant; 3=neither important nor unimportant; 4=important; and 5=very important), percentages (%) were based on those who gave a rating of 4 or 5; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

7. What Cruise Travellers Do

7-1. Organized Shore Excursion (36)

7-2. Activities Participated in While in PEI (40)

7-1. Organized Shore Excursion

Figure 14
Organized Shore Excursion
Taken by Season

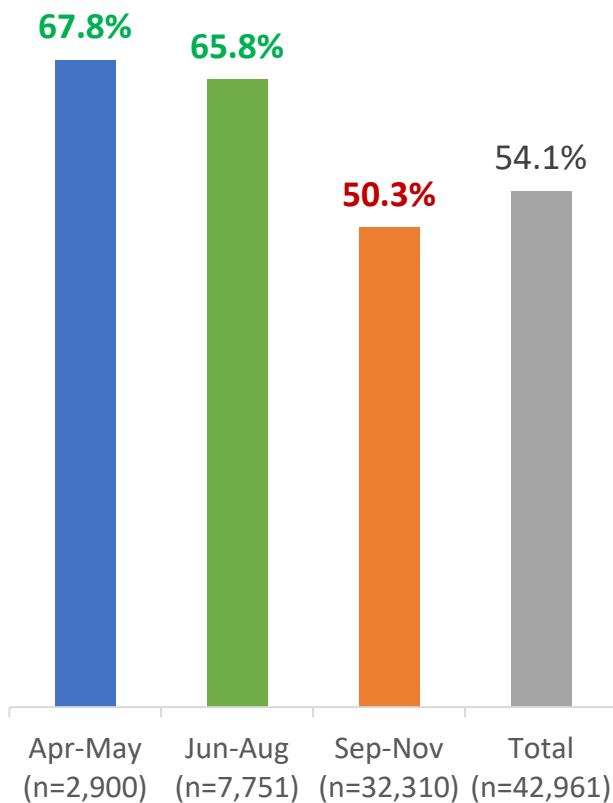


Figure 15
Average Number of Shore
Excursion(s) Taken by Season

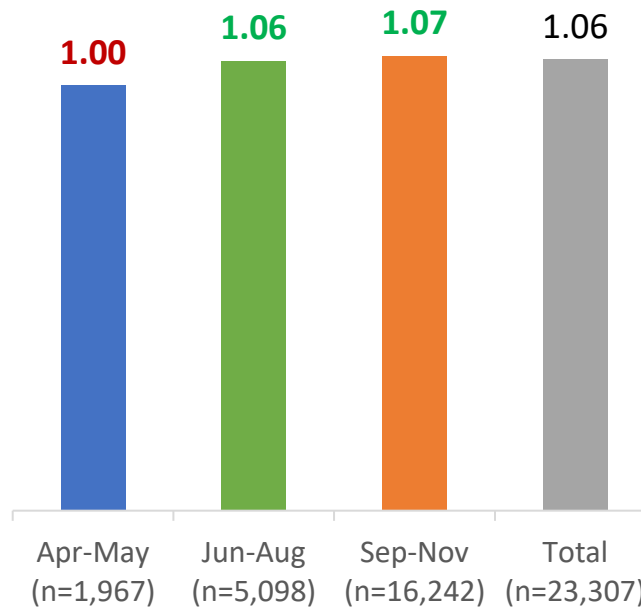
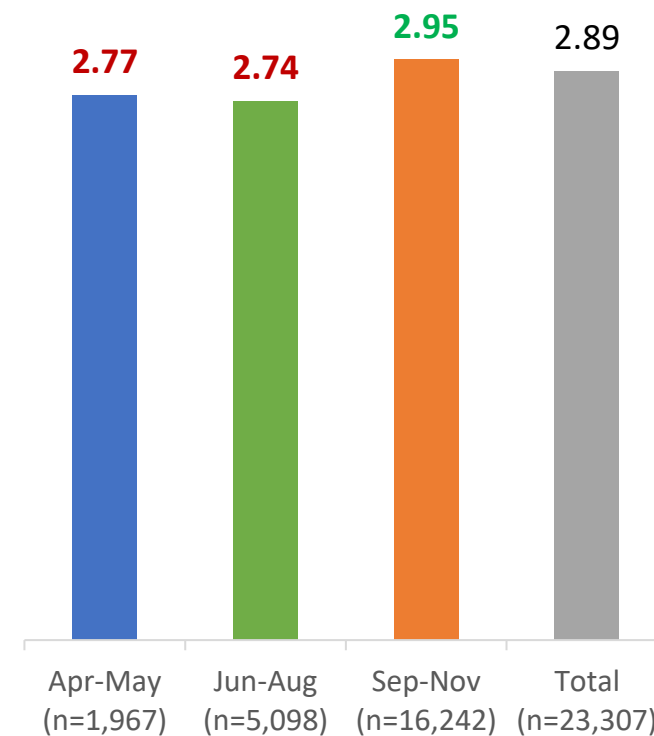


Figure 16
Average Number of People
Participated in Shore
Excursion by Season



Note: **Green Bold Number** indicates significantly higher than another group at 95% confidence level, **Red Bold Number** indicates significantly lower than another group.

7-1. Organized Shore Excursion (cont'd)

Table 12: Timing of Booking and Booking Method of Organized Shore Excursion by Season

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
When did you book your shore excursion? ^{a)}	(n=1,967; 8.4%)	(n=5,098; 21.9%)	(n=16,242; 69.7%)	(n=23,307; 100.0%)
Before I departed	79.8%	86.2%	77.1%	79.2%
After boarding the ship	13.7%	8.1%	11.9%	11.3%
I did not pre-book my excursion and purchased it upon arrival in Charlottetown	6.5%	5.7%	10.9%	9.5%
How did you book your shore excursion? ^{b)}	(n=1,839; 8.7%)	(n=4,806; 22.8%)	(n=14,464; 68.5%)	(n=21,109; 100.0%)
Through the cruise ship provider (online, by telephone, or through shore excursion staff)	92.4%	88.4%	85.8%	86.9%
Directly with operator/excursion provider (online, by telephone, in person, etc.)	7.6%	6.5%	10.3%	9.2%
Other	0.0%	5.1%	3.9%	3.9%

Note: '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

^{a)} Result was based on those who took an organized shore excursion while in port (n=23,307).

^{b)} Result was based on those who took an organized shore excursion while in port and booked the shore excursion before departing from their home or after boarding the ship (n=21,109).

7-1. Organized Shore Excursion (cont'd)

Table 13: Type of Transportation Used and Rating of Organized Shore Excursion by Season

	Apr-May (n=2,900; 6.8%)		Jun-Aug (n=7,751; 18.0%)		Sep-Nov (n=32,310; 75.2%)		Total (n=42,961; 100.0%)	
Type of Transportation ^{a)}	(n=1,967; 8.4%)		(n=5,098; 21.9%)		(n=16,242; 69.7%)		(n=23,307; 100.0%)	
Tour bus or organized coach tour	66.6%		85.1%		70.4%		73.2%	
Walking	32.2%		20.3%		27.3%		26.2%	
Mini-bus/Van	6.4%		3.1%		6.3%		5.6%	
Horse carriage	1.7%		3.4%		6.0%		5.1%	
Other	0.0%		1.0%		1.6%		1.3%	
Taxi/Limousine	0.0%		0.8%		1.0%		0.9%	
Rental car	0.0%		0.0%		0.8%		0.5%	
Boat, other than cruise ship	0.0%		0.8%		0.5%		0.5%	
Public bus	3.2%		0.0%		0.3%		0.5%	
Harbour Hippo	0.0%		0.6%		0.4%		0.4%	
Bicycle (biking, cycling)	0.0%		0.0%		0.5%		0.4%	
	Mean	%	Mean	%	Mean	%	Mean	%
Rating of the Shore Excursion ^{b)}	4.06	77.5%	4.41	88.0%	4.31	84.0%	4.31	84.3%

Note: '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

^{a)} Result was based on those who took an organized shore excursion while in port and multiple responses (n=23,307).

^{b)} While mean values were based on a five-point Likert-type scale (1=not at all important; 2=unimportant; 3=neither important nor unimportant; and 5=very important), percent (%) was based on those who gave a rating of 4 or 5.

7-1. Organized Shore Excursion (cont'd)

Figure 17

Average Spending Per Person on Shore Excursion by Season

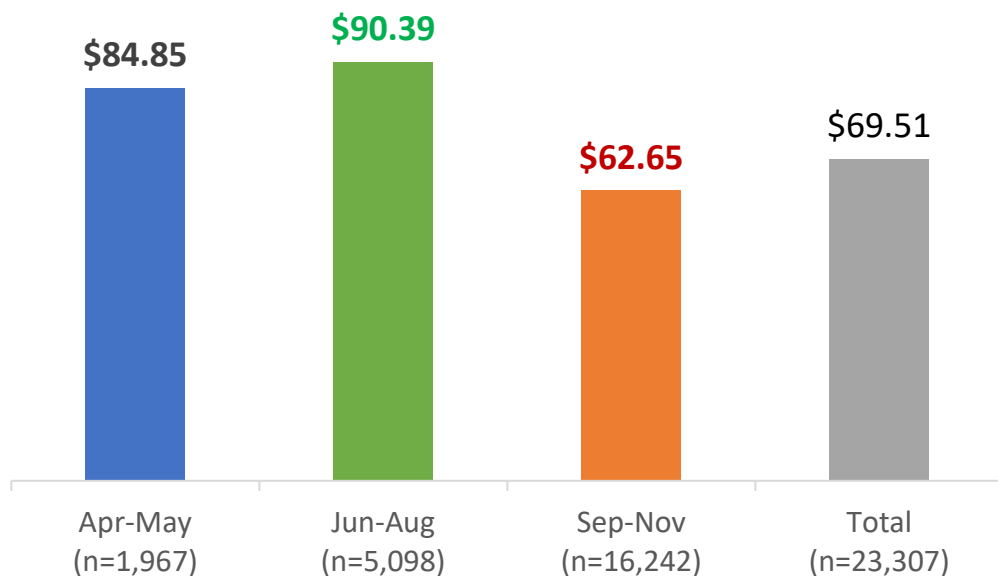
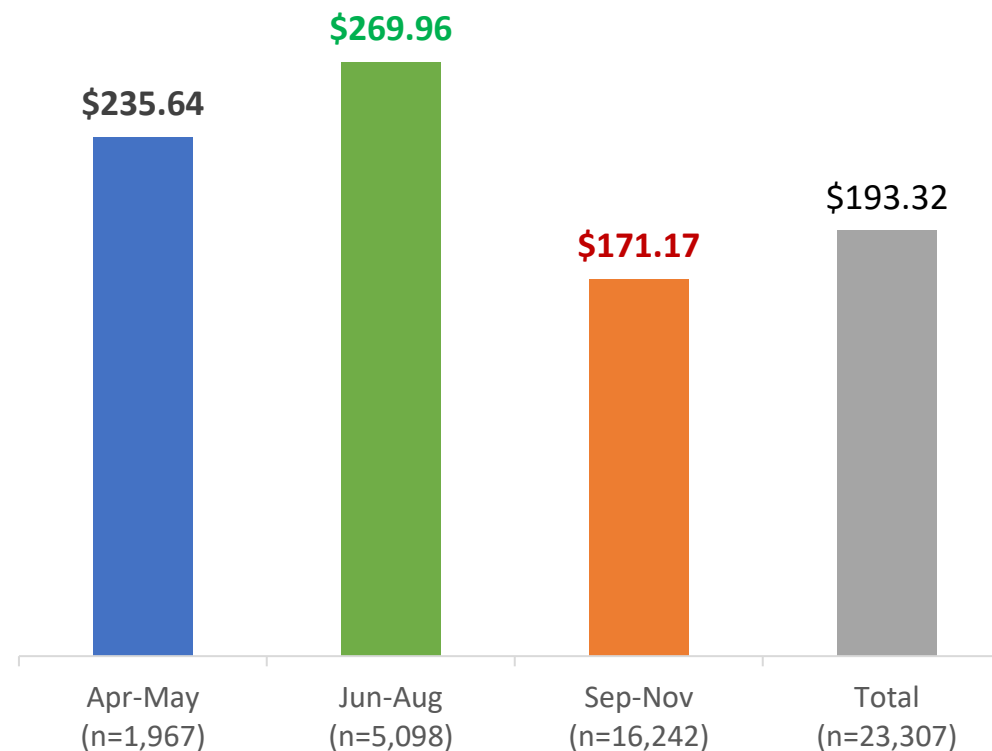


Figure 18

Average Spending per Party on Shore Excursion by Season



Note: **Green Bold Number** indicates significantly higher than another group at 95% confidence level, **Red Bold Number** indicates significantly lower than another group.

7-2. Activities Participated in While in PEI

Table 14: Top Activities Participated in While in PEI by Season

	Apr-May (n=2,829; 6.7%)	Jun-Aug (n=7,325; 17.2%)	Sep-Nov (n=32,310; 76.1%)	Total (n=42,464; 100.0%)
Shopping for local products	53.6%	48.5%	53.0%	52.3%
Walking, hiking	52.7%	31.8%	40.6%	39.9%
Sampling local culinary products	41.7%	27.1%	35.1%	34.2%
Visiting historic/heritage sites, or cultural attractions	34.9%	32.5%	29.9%	30.7%
Sightseeing, appreciating pastoral or rural settings	22.4%	21.3%	27.9%	26.4%
Visiting Founder's Food Hall	20.4%	24.7%	26.0%	25.4%
Shopping for general merchandise	13.9%	20.8%	27.1%	25.1%
Going to a full-service restaurant	19.8%	15.1%	16.6%	16.5%
Visiting Anne of Green Gables related attractions	20.1%	20.3%	13.1%	14.8%
Driving tour (scenic drives/views)	12.6%	13.3%	11.7%	12.0%
Seeing natural wonders	16.1%	11.7%	11.6%	11.9%
Visiting a national or provincial park	14.0%	9.5%	7.3%	8.1%
Going to a museum or art gallery	10.3%	9.1%	6.6%	7.3%
Using the Confederation Trail or other trails	0.0%	5.4%	6.0%	5.5%

Note: Valid Cruise Travel Parties (n=42,464) and indicates only those who reported the activities they participated in while in PEI; "0.0%" indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

7-2. Activities Participated in While in PEI (cont'd)

Table 15: Bottom Activities Participated in While in PEI by Season

	Apr-May (n=2,829; 6.7%)	Jun-Aug (n=7,325; 17.2%)	Sep-Nov (n=32,310; 76.1%)	Total (n=42,464; 100.0%)
Going to a beach	2.2%	3.1%	3.4%	3.3%
Attending a festival, event, or concert	0.0%	1.1%	3.2%	2.6%
Attending a live performance/entertainment	0.0%	3.0%	2.2%	2.2%
Participating in nature-based outdoor activities	3.5%	0.0%	2.5%	2.2%
Visiting friends and/or relatives	0.0%	2.7%	1.9%	1.9%
Biking, cycling, scootering	0.0%	1.4%	1.3%	1.2%
Taking part in an authentic PEI experience/hands-on learning activity (clam digging, pottery, etc.)	0.0%	1.1%	0.7%	0.7%
Going to a casino/racino (Charlottetown or Summerside)	0.0%	0.6%	0.4%	0.4%
Experiencing night-life activities	0.0%	0.0%	0.4%	0.3%
Playing golf (not miniature)	0.0%	0.0%	0.3%	0.3%
Participating in recreational motorized activities	0.0%	0.4%	0.2%	0.2%
Participating in recreational fishing or hunting	0.0%	0.0%	0.3%	0.2%
Health and wellness activities (yoga, spa, sauna, etc.)	0.0%	0.0%	0.2%	0.1%
Other	8.6%	9.8%	6.5%	7.2%

Note: Valid Cruise Travel Parties (n=42,464) and indicates only those who reported the activities they participated in while in PEI; "0.0%" indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

8. How Cruise Travellers Spend

- 8-1. Allocation of Travel Expenditures (43)
- 8-2. Estimated Total Direct Travel Expenditures (43)
- 8-3. Estimated Average Spending per Person (44)
- 8-4. Estimated Average Spending per Party (45)

8-1. Allocation of Travel Expenditures

Figure 19
% of Expenditures, including Shore Excursions
by Cruise Travellers

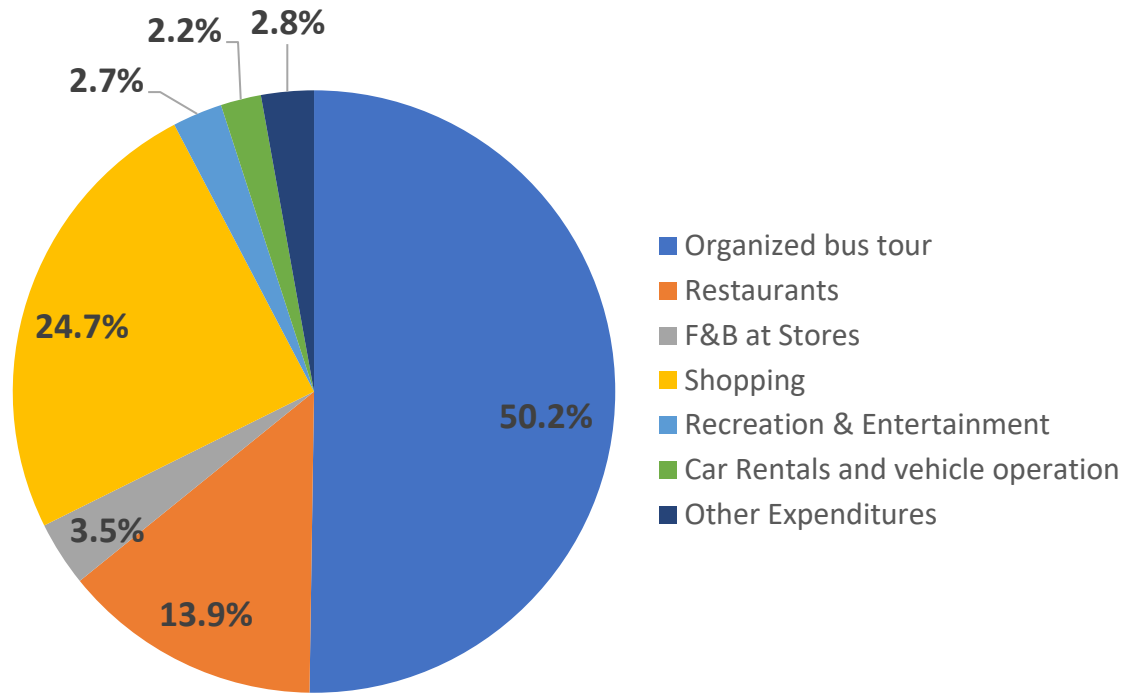
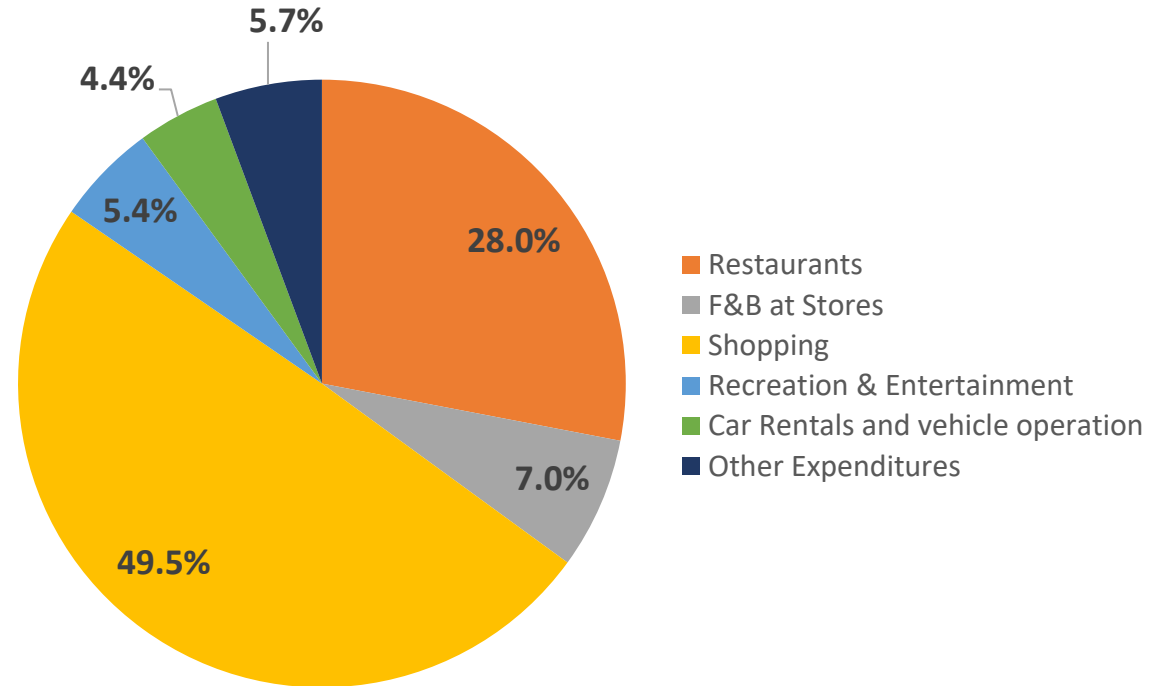


Figure 20
% of Expenditures, excluding Shore Excursions
by Cruise Travellers



8-2. Estimated Total Direct Expenditures



Table 16: Estimated Total Direct Expenditures by Cruise Travellers to PEI in 2023

	Apr-May		Jun-Aug		Sep-Nov		Total	
Number of Individual Passengers (%)	8,339	(7.0%)	22,865	(19.1%)	88,284	(73.9%)	119,488	(100.0%)
Number of Passenger Parties (%)	2,900	(6.8%)	7,751	(18.0%)	32,310	(75.2%)	42,961	(100.0%)
Total Direct Expenditures	\$1,186,586	(7.2%)	\$3,524,797	(21.3%)	\$11,819,749	(71.5%)	\$16,531,132	(100.0%)
Organized Shore Excursion	\$707,581	59.6%	\$2,066,875	58.6%	\$5,530,682	46.8%	\$8,305,138	50.2%
Restaurants and Bars	\$135,414	11.4%	\$358,176	10.2%	\$1,810,984	15.3%	\$2,304,573	13.9%
Food and Beverage at Stores	\$35,378	3.0%	\$120,676	3.4%	\$420,377	3.6%	\$576,430	3.5%
Shopping	\$237,884	20.0%	\$744,128	21.1%	\$3,093,716	26.2%	\$4,075,729	24.7%
Recreation and Entertainment	\$36,535	3.1%	\$70,739	2.0%	\$335,730	2.8%	\$443,004	2.7%
Car Rentals and Local Transportation	\$19,364	1.6%	\$46,395	1.3%	\$293,109	2.5%	\$358,869	2.2%
Other Expenses	\$14,430	1.2%	\$117,808	3.3%	\$335,151	2.8%	\$467,388	2.8%

Note: Total direct expenditures were calculated as follows: average spending per person per day (\$138.35) × number of cruise ship passengers (119,488) ≈ \$16,531,000 or average spending per party per day (\$384.79) × number of cruise ship passenger parties (42,961) ≈ \$16,531,000.

8-3. Estimated Average Spending per Person per Day



Table 17: Estimated Average Spending per Person per Day in 2023

	Apr-May		Jun-Aug		Sep-Nov		Total	
Number of Individual Passengers (%)	8,339	(7.0%)	22,865	(19.1%)	88,284	(73.9%)	119,488	(100.0%)
Number of Passenger Parties (%)	2,900	(6.8%)	7,751	(18.0%)	32,310	(75.2%)	42,961	(100.0%)
Average Spending per Person per Day	\$142.29	100.0%	\$154.16	100.0%	\$133.88	100.0%	\$138.35	100.0%
Organized Shore Excursion	\$84.85	59.6%	\$90.39	58.6%	\$62.65	46.8%	\$69.51	50.2%
Restaurants and Bars	\$16.24	11.4%	\$15.66	10.2%	\$20.51	15.3%	\$19.29	13.9%
Food and Beverage at Stores	\$4.24	3.0%	\$5.28	3.4%	\$4.76	3.6%	\$4.82	3.5%
Shopping	\$28.53	20.0%	\$32.54	21.1%	\$35.04	26.2%	\$34.11	24.7%
Recreation and Entertainment	\$4.38	3.1%	\$3.09	2.0%	\$3.80	2.8%	\$3.71	2.7%
Car Rentals and Local Transportation	\$2.32	1.6%	\$2.03	1.3%	\$3.32	2.5%	\$3.00	2.2%
Other Expenses	\$1.73	1.2%	\$5.15	3.3%	\$3.80	2.8%	\$3.91	2.8%

8-4. Estimated Average Spending per Party per Day



Table 18: Estimated Average Spending per Party per Day in 2023

	Apr-May		Jun-Aug		Sep-Nov		Total	
Number of Individual Passengers (%)	8,339	(7.0%)	22,865	(19.1%)	88,284	(73.9%)	119,488	(100.0%)
Number of Passenger Parties (%)	2,900	(6.8%)	7,751	(18.0%)	32,310	(75.2%)	42,961	(100.0%)
Average Spending per Party per Day	\$395.17	100.0%	\$460.38	100.0%	\$365.82	100.0%	\$384.79	100.0%
Organized Shore Excursion	\$235.64	59.6%	\$269.96	58.6%	\$171.17	46.8%	\$193.32	50.2%
Restaurants and Bars	\$45.10	11.4%	\$46.78	10.2%	\$56.05	15.3%	\$53.64	13.9%
Food and Beverage at Stores	\$11.78	3.0%	\$15.76	3.4%	\$13.01	3.6%	\$13.42	3.5%
Shopping	\$79.22	20.0%	\$97.19	21.1%	\$95.75	26.2%	\$94.87	24.7%
Recreation and Entertainment	\$12.17	3.1%	\$9.24	2.0%	\$10.39	2.8%	\$10.31	2.7%
Car Rentals and Local Transportation	\$6.45	1.6%	\$6.06	1.3%	\$9.07	2.5%	\$8.35	2.2%
Other Expenses	\$4.81	1.2%	\$15.39	3.3%	\$10.37	2.8%	\$10.88	2.8%

9. How PEI Rates

9-1. Rating of Aspects of the Trip to PEI (47)

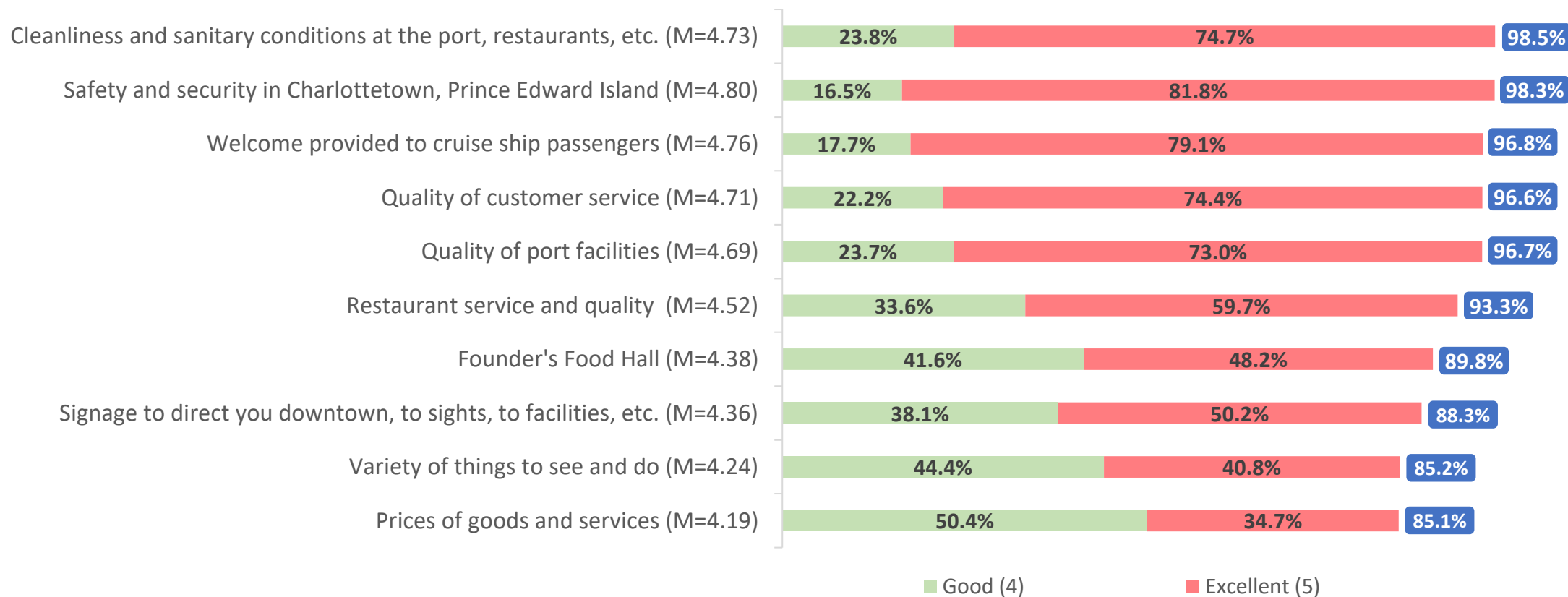
9-2. Evaluation of the Trip and Satisfaction (49)

9-3. Behavioural Intentions (51)

9-4. Instances of Complaints (53)

9-1. Rating of Aspects of the Trip to PEI

Figure 21
Rating of Aspects of the Trip to PEI



Base: All cruise travel parties (n=42,961)

Note: "Good" was for those who gave a rating of 4, while "Excellent" was for those who gave a rating of 5; M (mean values) were based on a five-point Likert-type quality measure scale (1=very poor; 2=poor; 3=average; 4=good; and 5=very important).

9-1. Rating of Aspects of the Trip to PEI (cont'd)

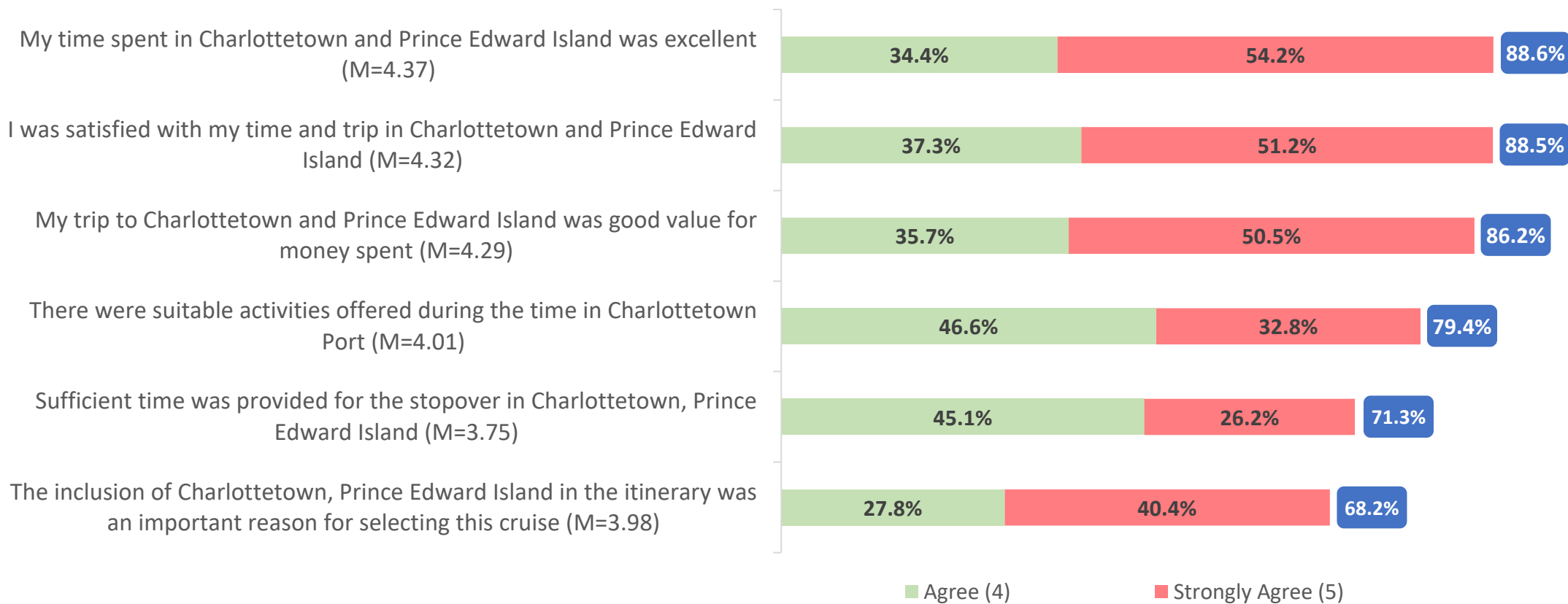
Table 19: Rating of Aspects of the Trip to PEI by Season

	Apr-May (n=2,900; 6.8%)		Jun-Aug (n=7,751; 18.0%)		Sep-Nov (n=32,310; 75.2%)		Total (n=42,961; 100.0%)	
	Mean	%	Mean	%	Mean	%	Mean	%
Quality of port facilities	4.83	96.4%	4.72	89.3%	4.67	89.8%	4.69	90.2%
Safety and security in Charlottetown, Prince Edward Island	4.89	95.3%	4.80	86.0%	4.79	90.6%	4.80	90.1%
Welcome provided to cruise ship passengers	4.85	96.4%	4.76	87.9%	4.75	88.9%	4.76	89.2%
Cleanliness and sanitary conditions at the port, restaurants, attractions, etc.	4.74	91.1%	4.75	85.3%	4.72	89.7%	4.73	89.0%
Quality of customer service	4.74	91.4%	4.72	85.8%	4.70	87.3%	4.71	87.3%
Variety of things to see and do	4.36	86.8%	4.31	74.7%	4.21	77.0%	4.24	77.2%
Signage to direct you downtown, to sights, to facilities, etc.	4.44	80.4%	4.36	69.4%	4.36	76.0%	4.36	75.1%
Prices of goods and services	4.20	76.2%	4.19	68.5%	4.18	75.8%	4.19	74.5%
Restaurant service and quality (quality of food & beverage at restaurants)	4.45	50.6%	4.45	49.7%	4.54	56.5%	4.52	54.9%
Founder's Food Hall	4.44	34.4%	4.41	56.6%	4.37	55.3%	4.38	54.1%

Note: While mean values were based on a five-point Likert-type quality measure scale (1=very poor; 2=poor; 3=average; 4=good; and 5=excellent), percent (%) was based on those who gave a rating of 4 or 5; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

9-2. Evaluation of the Trip and Satisfaction

Figure 22
Evaluation of the Trip and Satisfaction



Base: All cruise travel parties (n=42,961)

Note: "Agree" was for those who gave a rating of 4, while "Strongly Agree" was for those who gave a rating of 5; M (mean values) were based on a five-point Likert-type scale (1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; and 5=strongly agree).

9-2. Evaluation of the Trip and Satisfaction (cont'd)

Table 20: Evaluation of the Trip and Satisfaction by Season

	Apr-May (n=2,900; 6.8%)		Jun-Aug (n=7,751; 18.0%)		Sep-Nov (n=32,310; 75.2%)		Total (n=42,961; 100.0%)	
	Mean	%	Mean	%	Mean	%	Mean	%
My time spent in Charlottetown and Prince Edward Island was excellent	4.34	82.6%	4.42	79.8%	4.37	82.8%	4.37	82.3%
I was satisfied with my time and trip in Charlottetown and Prince Edward Island	4.31	82.7%	4.38	82.8%	4.31	81.8%	4.32	82.0%
My trip to Charlottetown and Prince Edward Island was good value for money spent	4.40	84.7%	4.35	79.4%	4.27	78.0%	4.29	78.7%
There were suitable activities offered during the time in Charlottetown Port	4.09	78.5%	4.15	75.3%	3.98	71.1%	4.01	72.4%
Sufficient time was provided for the stopover in Charlottetown, Prince Edward Island	3.85	74.3%	3.60	61.5%	3.78	66.8%	3.75	66.3%
The inclusion of Charlottetown, Prince Edward Island in the itinerary was an important reason for selecting this cruise	4.24	75.5%	4.16	69.1%	3.91	59.3%	3.98	62.2%

Note: While mean values were based on a five-point Likert-type scale (1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; and 5=strongly agree), percent (%) was based on those who gave a rating of 4 or 5; **Green Bold Number** indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

9-3. Behavioural Intentions



Figure 23

Intention to Recommend PEI as a Travel Destination to Others by Season

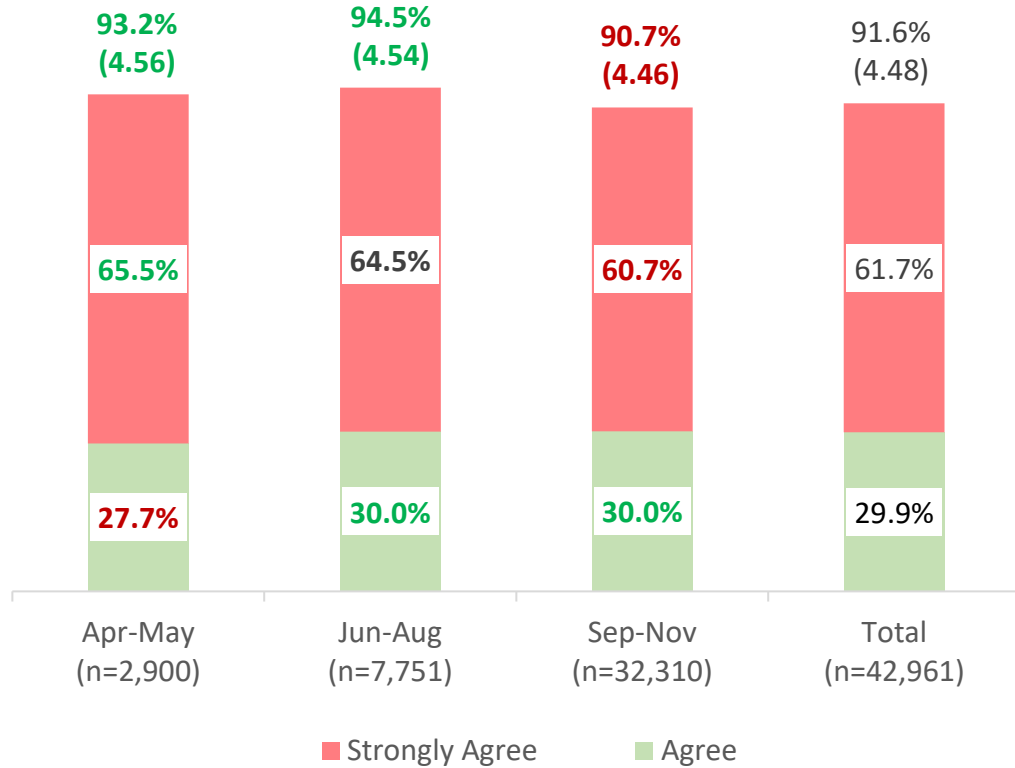
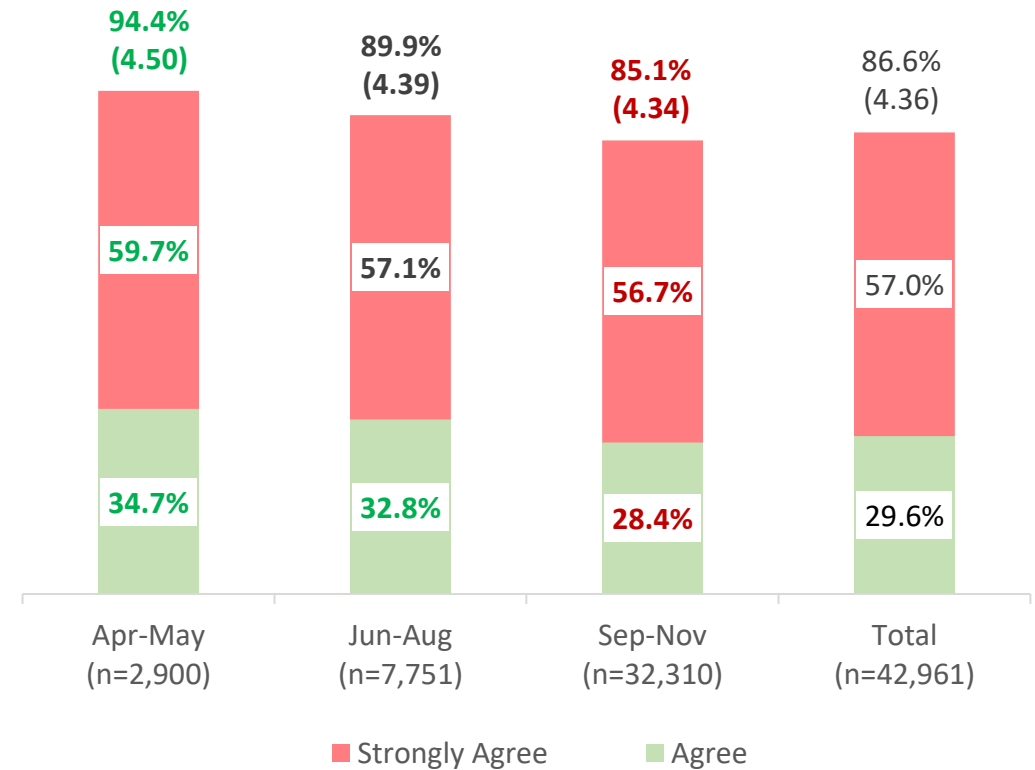


Figure 24

Intention to Visit PEI in the Future by Season



Note: Numbers in parentheses indicate mean values based on a five-point Likert-type scale (1=strongly disagree; 2=disagree; 3=neither agree nor disagree; 4=agree; and 5=strongly agree); **Green Bold Number** indicates significantly higher than another group at 95% confidence level, **Red Bold Number** indicates significantly lower than another group.

9-3. Behavioural Intentions (cont'd)

Table 21: Returning to PEI for Vacation in the Future and How to Return to PEI by Season

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Will you return to vacation in PEI in the future? ^{a)}				
Yes, within the next 12 months (1 year)	1.3%	0.8%	4.1%	3.3%
Yes, at some point after a year	29.9%	29.7%	28.3%	28.7%
I may return	35.4%	41.8%	40.5%	40.4%
I am unlikely to return	7.6%	7.5%	12.0%	10.9%
No, I will not return	2.2%	2.5%	1.8%	2.0%
Don't know/not sure	23.6%	17.7%	13.3%	14.7%
Would you tell us how you plan to return to PEI? ^{b)}	(n=1,932; 6.2%)	(n=5,608; 18.0%)	(n=23,562; 75.8%)	(n=31,103; 100.0%)
By cruise ship	22.5%	21.2%	29.4%	27.6%
By air	8.7%	11.7%	14.4%	13.6%
By car, motor coach, etc. (land transportation)	18.7%	21.9%	17.8%	18.6%
Don't know/not sure	50.1%	45.2%	38.4%	40.3%

Note: ^{a)} Result was based on all passenger parties (Total N = 42,961).

^{b)} Result was based on those who planned to return to PEI for vacation in the future (n=31,103).

Green Bold Number indicates significantly higher than other groups at 95% confidence level, **Red Bold Number** indicates significantly lower than other groups.

9-4. Motivations for Returning to Travel to PEI in the Future

Key Themes

These key themes about *motivations to return to vacation in Prince Edward Island in the future* were summarized by Artificial Intelligence.

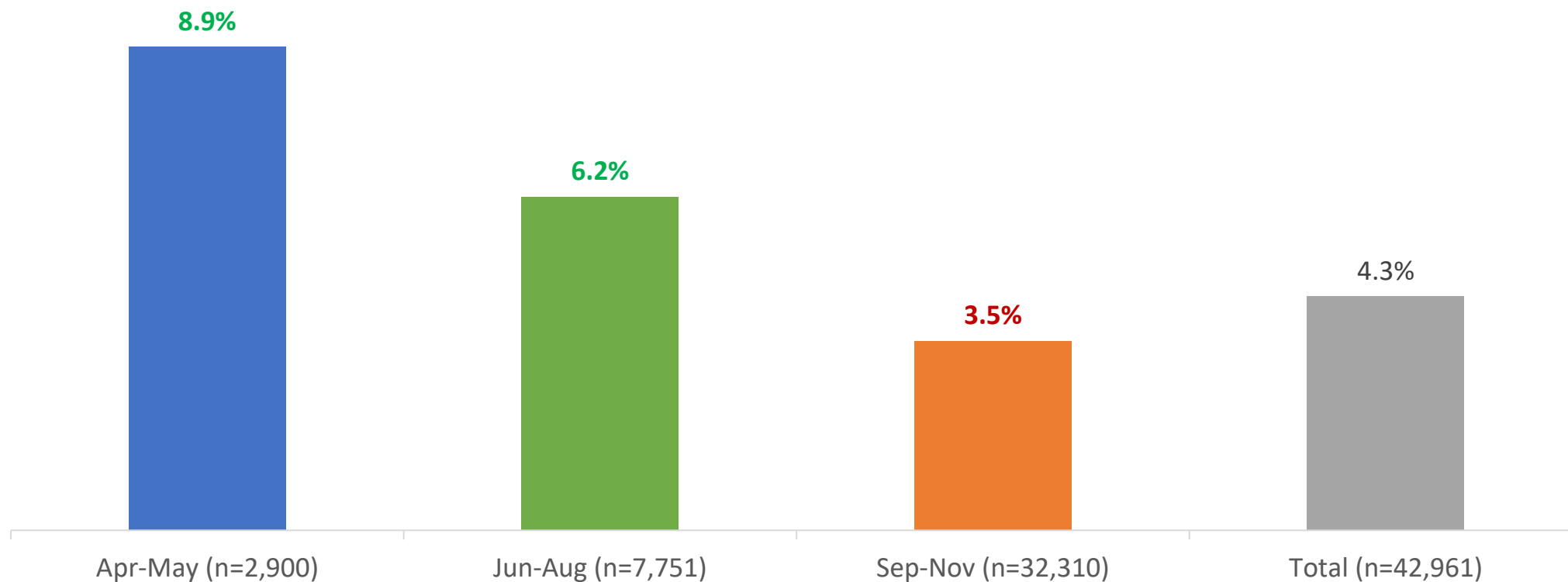
- 1) Natural beauty and scenery
- 2) Friendliness and hospitality
- 3) Exploration, leisure, and activities
- 4) Desire for return visits
- 5) Positive impressions
- 6) Cruise experience
- 7) Interest in Anne of Green Gables
- 8) Family and personal connections
- 9) Food and culinary experience

Base: 1,685 motivations from 713 respondents who reported at least one motivation to return to vacation in Prince Edward Island in the future.

Note: Results were based on up to three responses to an open-ended question.

9-5. Instances of Complaints

Figure 26
Instance of Complaints by Season



Note: **Green Bold Number** indicates significantly higher than another group at 95% confidence level, **Red Bold Number** indicates significantly lower than another group.

9-6. Key Themes of Complaints

These key themes about complaints were summarized by Artificial Intelligence.

1) **Unpleasant Incidents**

A negative experience with a racist individual on board was mentioned, reflecting a concern for passenger safety and the need for effective crew response.

2) **Disembarkation / Embarkation Issues**

Limited exit points on the boat and issues with gangplanks causing delays were highlighted, suggesting room for improvement in the logistics of passenger movement.

3) **Weather Conditions**

Complaints about unexpected heat and humidity in Canada, particularly in certain businesses lacking air conditioning, indicate a need for climate control considerations in public spaces.

4) **Mixed reviews on Excursions**

Some participants found excursions to be expensive for their duration, and there were mixed reviews on the quality and content of specific tours, including disappointment with the Anne of Green Gables experience

5) **Currency and Payment issues**

Challenges with payment methods, refusal of credit cards, and difficulties exchanging currency were raised as concerns, impacting overall experience, particularly related to dining expenses

9-6. Key Themes of Complaints (cont'd)

6) **Insufficient Time and Rushed Tours**

Multiple instances were noted where the duration of tours, limited time at attractions, and long bus journeys affected the quality of the experience, causing frustration among passengers.

7) **Transportation Issues**

Complaints about buses lacking air conditioning, breakdowns, and uncomfortable conditions during long journeys contribute to the perception of a less-than-ideal transportation experience

8) **Accessibility Concerns**

Issues related to uneven ground, lack of wheelchair accessibility, and challenges faced by individuals with mobility concerns were highlighted, suggesting a need for improved infrastructure

9) **Cruise Ship size and Impact on Local Area**

Concerns about large cruise ships negatively affecting local businesses, traffic congestion, and limited access due to ship size indicate environmental and community impact considerations

10) **Communication and Signage Problems**

Lack of clear signage, issues with street signs, and challenges finding public restrooms indicate a need for improved communication and navigational guidance for tourists

9-6. Key Themes of Complaints (cont'd)

11) Tour Guide Quality

Passengers expressed dissatisfaction with certain tour guides, emphasizing the importance of knowledgeable guides who enhance the overall experience.

12) Shopping and Customer Experience

Poor customer service experiences at stores, lack of assistance, and difficulty finding prices contribute to a less positive perception of the retail environment.

13) Booking and Availability of Excursions

Passengers reported challenges in booking excursions due to limited availability, suggesting a better need for communication regarding tour options and alternatives.

14) Cultural Sensitivity and Friendliness

Instances of unfriendly behaviour towards tourists, particularly French Canadians, were mentioned, highlighting the importance of cultural sensitivity and positive interactions.

15) Restaurant and Venue Closures

Issues related to venue closures, such as military museum becoming a bar, suggest a need for updated information and accurate representations in promotional materials.

10. Comments from Survey Respondents

10-1. Major Topics of Comments

As a result of analyzing the latent semantic analysis in the texting mining tool by using contexts of survey respondents' comments, the following 22 related major topics were produced.

Table 22: Major Topics of Comments

	Words		Words
Topic 1	love, PEI, visit, time, explore	Topic 12	stop
Topic 2	cruise ship, excursion, offer, cruise line	Topic 13	nice, trip, travel, tour
Topic 3	bus	Topic 14	place
Topic 4	tour, inform, spend	Topic 15	area, shop, good, food
Topic 5	enjoyed, walking	Topic 16	stay, longer
Topic 6	beautiful, people	Topic 17	help
Topic 7	island, PEI/Charlottetown, guide, close	Topic 18	welcoming, found
Topic 8	great, port, day	Topic 19	back, local, thing
Topic 9	Friend	Topic 20	return, feel
Topic 10	Anne of Green Gables	Topic 21	experience, cities, wonder, excel
Topic 11	town	Topic 22	Canada, lot, felt

Base: 418 respondents who reported comments about the cruise trip to Charlottetown, PEI.

Note: Result was based on the word cloud analysis of the text mining tools and up to three responses to an open-ended question.

10-2. Keywords of Comments

Keywords

- The word cloud for *comments by survey respondents* covers a wider range of topics (high number of keywords with a high frequency of occurrence). The term is centered around the keyword, *PEI/Charlottetown*.
- The cloud is also built around the keywords: *tour/travel/trip, love, cruise ship, visit, and time*.
- The third important keywords include *enjoyed, beautiful, Anne of Green Gables, port, and great*.

Base: 418 respondents who reported comments about the cruise trip to Charlottetown, PEI.

Note: Result was based on the word cloud analysis of the text mining tools and up to three responses to an open-ended question.

Figure 27
Keywords for motivations to return



11. Demographic Characteristics of Survey Respondents

Table 23: Demographic Characteristics of Survey Respondents by Season

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Gender				
Male	34.4%	29.1%	30.0%	30.2%
Female	65.6%	70.4%	69.9%	69.7%
Other	0.0%	0.5%	0.1%	0.2%
Age				
18 - 24	1.3%	2.0%	0.1%	0.5%
25 - 34	3.4%	1.9%	1.5%	1.7%
35 - 44	4.2%	4.2%	1.7%	2.3%
45 - 54	3.9%	9.3%	6.9%	7.2%
55 - 64	42.1%	27.3%	27.1%	28.2%
65 - 74	34.8%	42.1%	49.0%	46.8%
75 and over	10.3%	13.1%	13.7%	13.3%

Note: Demographic profiles are based on weighted values; '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments.

Table 23: Demographic Characteristics (cont'd)

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Mother Tongue				
English	94.5%	88.8%	94.0%	93.1%
French	3.4%	2.7%	1.8%	2.0%
Other	2.2%	8.5%	4.3%	4.9%
Current Marital Status				
Single	14.9%	18.7%	12.8%	13.9%
Married or living common law	79.8%	77.1%	82.0%	81.0%
Other	5.3%	4.2%	5.2%	5.0%
Average Number of Children in the Household				
17 years and younger ^{a)}	0.03	0.08	0.04	0.05
18 years and older ^{a)}	0.29	0.27	0.22	0.23
17 years and younger ^{b)}	2.00	1.32	1.48	1.44
18 years and older ^{b)}	1.99	1.52	1.59	1.60

Note: Demographic profiles are based on weighted values; ^{a)} based on all respondents; ^{b)} based on those who have.

Table 23: Demographic Characteristics (cont'd)

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Level of Education				
Some school	0.0%	0.0%	0.8%	0.6%
High school diploma	11.7%	5.8%	5.6%	6.0%
Some post-secondary	4.6%	9.1%	12.5%	11.4%
Graduated community/technical college	18.6%	11.5%	18.2%	17.1%
Graduated university (undergraduate degree)	33.2%	30.5%	31.7%	31.6%
Post graduate degree/professional designation	32.0%	43.2%	31.1%	33.3%
Current Employment Status				
Working full time	29.3%	26.5%	20.7%	22.3%
Working part time or seasonally	14.6%	7.6%	6.7%	7.4%
Unemployed	0.0%	0.4%	0.2%	0.2%
Retraining or upgrading	0.0%	0.0%	0.2%	0.2%
Retired	55.0%	61.8%	68.2%	66.2%
Homemaker	1.1%	1.6%	2.2%	2.0%
Student	0.0%	1.0%	0.0%	0.2%
Other	0.0%	1.1%	1.9%	1.6%

Note: '0.0%' indicates 'not applicable' rather than 'zero' because there are no samples in the specific segments; Demographic profiles are based on weighted values.

Table 23: Demographic Characteristics (cont'd)

	Apr-May (n=2,900; 6.8%)	Jun-Aug (n=7,751; 18.0%)	Sep-Nov (n=32,310; 75.2%)	Total (n=42,961; 100.0%)
Total Household Income (before taxes and deductions) in 2022				
Under \$40,000	7.1%	4.6%	5.4%	5.4%
\$40,000 to \$59,999	8.1%	4.0%	6.4%	6.1%
\$60,000 to \$79,999	5.7%	10.6%	10.2%	9.9%
\$80,000 to \$99,999	4.7%	9.3%	10.5%	9.9%
\$100,000 to \$124,999	9.0%	14.9%	11.8%	12.2%
\$125,000 to \$149,999	8.4%	10.1%	7.7%	8.2%
\$150,000 to \$174,999	10.8%	4.7%	6.3%	6.3%
\$175,000 to \$199,999	7.4%	4.2%	3.7%	4.0%
\$200,000 or more	8.4%	11.0%	11.5%	11.2%
Not Answered	30.2%	26.7%	26.5%	26.8%

Note: Demographic profiles are based on weighted values.