

An aerial photograph of a coastal landscape. On the left, the ocean waves gently wash onto a wide, sandy beach. A paved road runs parallel to the beach, separating it from a lush green area that appears to be a golf course. To the right of the road, there is a body of water, possibly a bay or a lake, surrounded by dense evergreen trees. The overall scene is peaceful and scenic, with soft lighting suggesting early morning or late afternoon.

Year in Review - 2025

Tourism Industry Partner Day

March 26, 2026

*Prince
Edward
Island*
CANADA

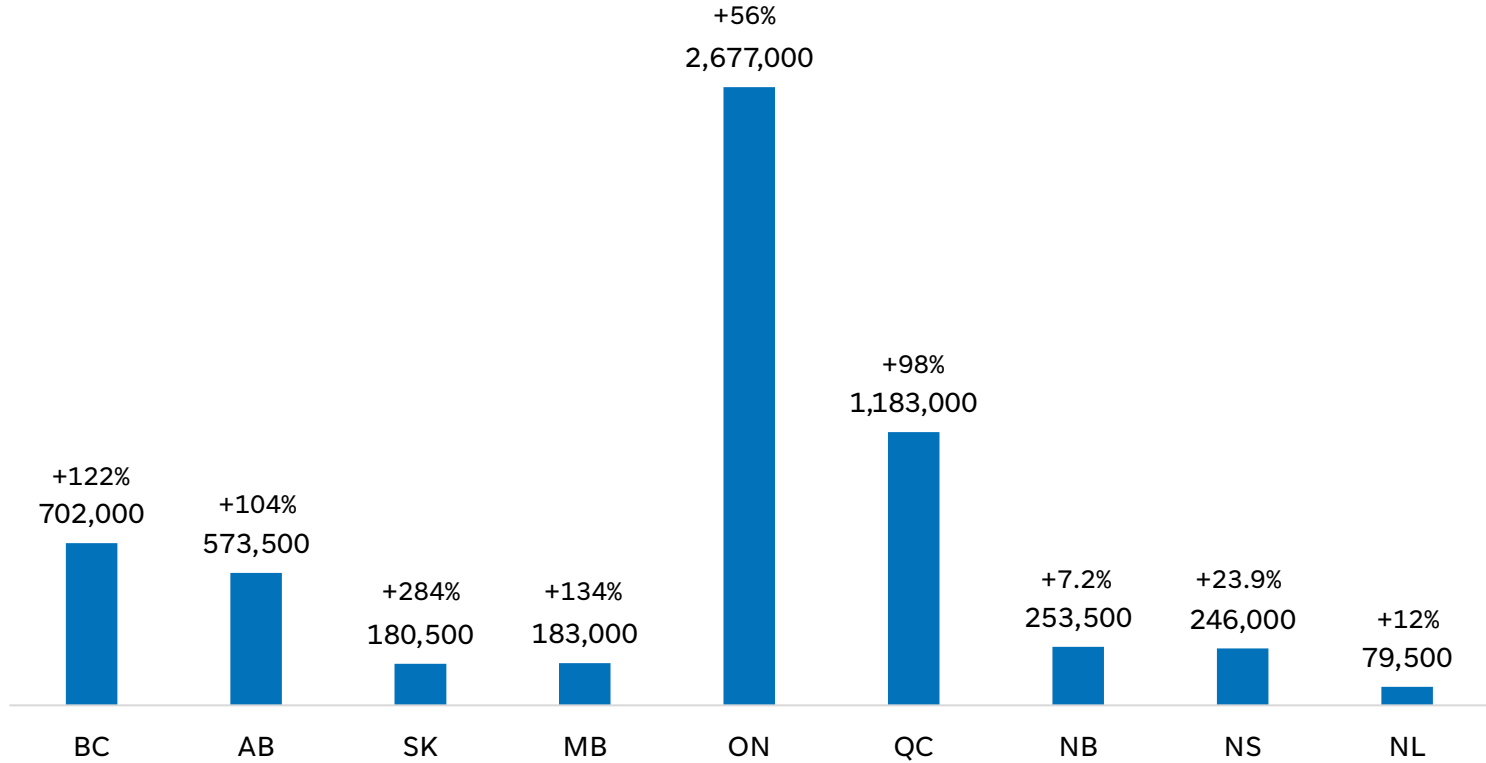
Market disruptions created an opportunity to capture new first-time domestic visitors, who continue to present the strongest immediate opportunity for PEI



Potential Out-of-Market Size



Out-of-Province Travellers Seriously Considering PEI in the Next Year



Key Insights

- Overall, there was a 13% increase in Canadian out-of-province travellers who were seriously considering PEI for a leisure trip over 2024 and a 72% increase over 2022.
- Ontario and Quebec represent significant source market opportunities due to their size, proximity to PEI, and degree of uncaptured potential travel demand.
- Nova Scotia and New Brunswick are significantly smaller markets, but PEI has been highly successful at converting potential demand, generating repeat visitation, and multiple visits per year from these markets. They remain critical to the success of PEI’s visitor economy.
- There is strong market potential and interest in PEI from Alberta and British Columbia; however, there are more obstacles to converting that demand potential (e.g. direct air access).

Source: 2024 Global Traveller Research Program Prince Edward Island Full Report, Destination Canada and 2021 Global Traveller Research Program Topline Report Prince Edward Island

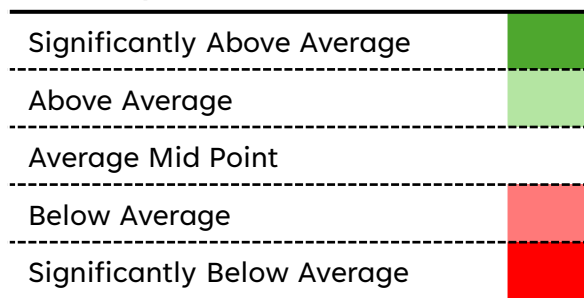
Travel Intent



Compared to the previous quarter (Q-o-Q) and the previous year (Y-o-Y, 2024)

Travel Intent	Q1,2025		Q2,2025		Q3,2025		Q4,2025	
	Q-o-Q	Y-o-Y	Q-o-Q	Y-o-Y	Q-o-Q	Y-o-Y	Q-o-Q	Y-o-Y
CAN to CAN	23%	14%	13%	39%	-4%	36%	-6%	25%
US to CAN	-1%	-9%	19%	10%	-15%	3%	-4%	-3%
CAN to US	-40%	-36%	-22%	-48%	2%	-45%	12%	-46%
Overseas to CAN	0%	1%	-2%	-3%	0%	0%	7%	5%
Overseas to US	-17%	-14%	-6%	-22%	1%	-19%	-1%	-23%

Heatmap



Key Insights

- Canadian residents' interest in domestic destinations travel intent was at an all-time high throughout the year, surpassing historical averages.
- US travel intent remained stable throughout the year, despite the continued geopolitical uncertainty.
- Canadians to US travel intent fell significantly year-over-year. This drop aligns with tariff tensions, weakening traveller confidence and perceived value.
- Travel intent from overseas markets toward Canada was stable throughout the year, likely contributing towards growth in overnight air arrivals.
- Overseas travel intent toward the U.S. declined with consistent year-over-year decreases across all quarters.

Travel Intent – Of the destinations considered, which are you most likely to visit?

Source: Destination Canada Market Signals Monthly Report, YouGov Destination Index

Paid Overnight Stays

Markets driving increased paid overnight stays in 2025



▲ 7% 🔥



▲ 7% 🔥



▲ 27% 🔥



▲ 18%



▲ 10%

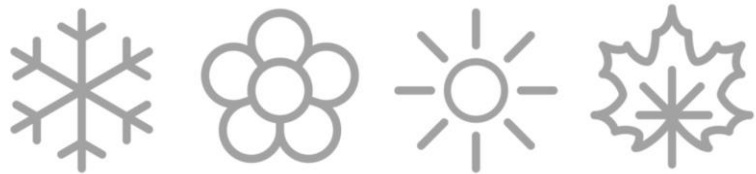


▲ 28% 🔥

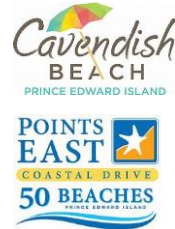
🔥 = Year-to-date, record-setting pace

Source: Tourism PEI, Occupancy Database, 2025

PEI's strategic focus on four-season tourism and seasonal dispersion of visitor activity is achieving results



Collaborative Multi-Pronged Approach



Partial Festival/Event Sample:

- Cavendish Literary Festival
- PEI Fibre Festival
- PEI Winter Bluegrass Festival
- Hot Chocolate Trail
- Eastern Kings ATV Weekend
- Charlottetown Christmas Festival
- Good Tidings on the North Shore

Leisure Visitation

- Goolahalla Festival
- Jack Frost
- Winterville



2025 snapshot:

- 85% of business events booked outside summer season
- 122 confirmed business events
- 15,476 delegates
- \$17.7 million in anticipated economic impact

Business Travel



2025 Events:

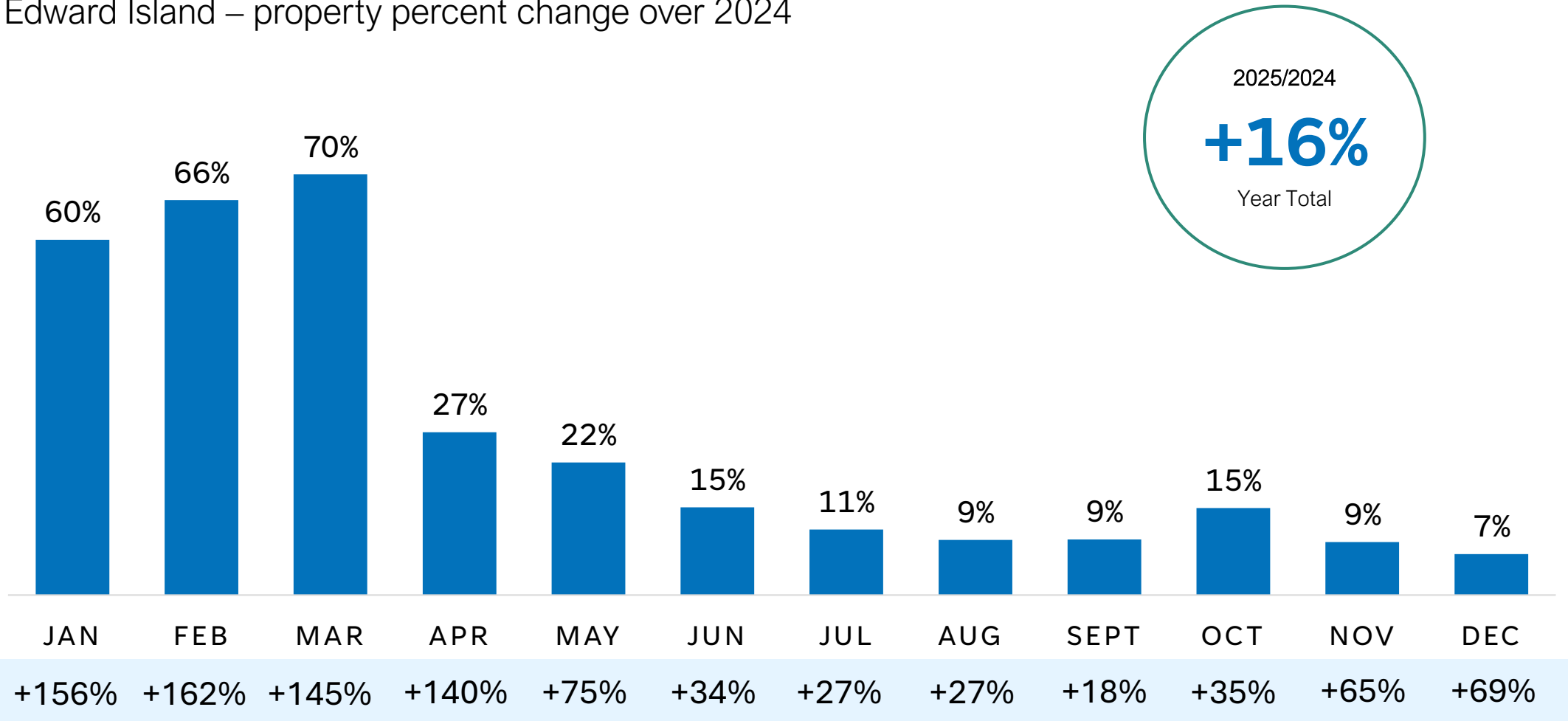
- Canadian Mixed Doubles Championship
- Women's Hockey Rivalry Series
- Noah Dobson's HockeyFest

Sport tourism

Operations Open



Prince Edward Island – property percent change over 2024

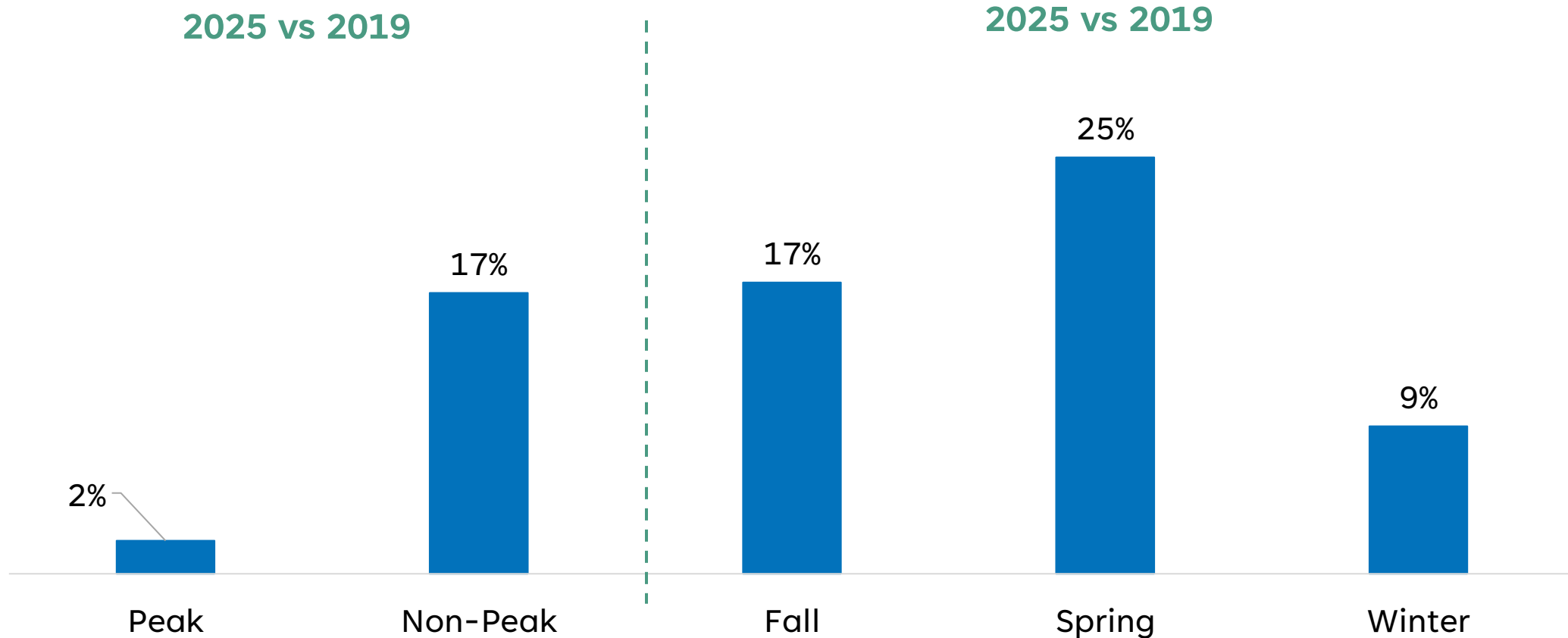


Source: Tourism PEI, CRM Occupancy Database

Room-Nights Sold



Prince Edward Island – growth in room-nights sold



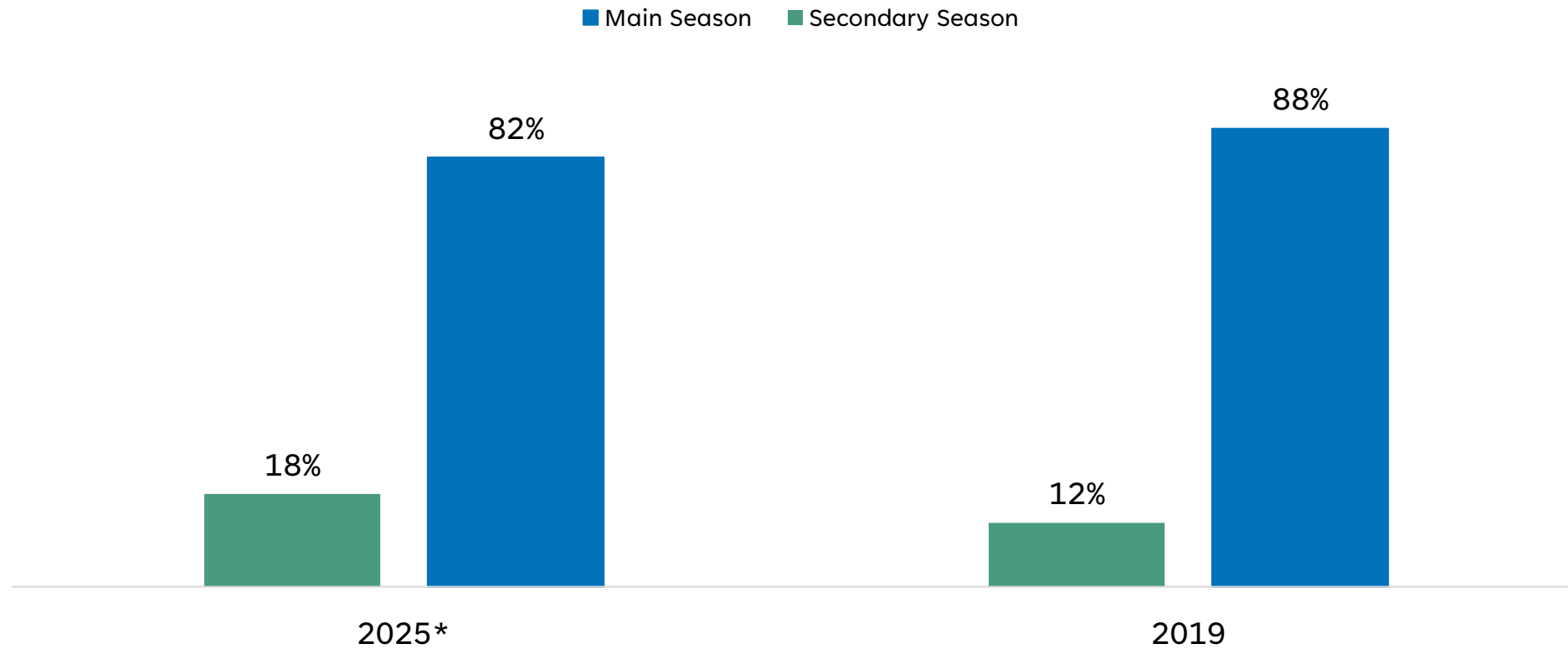
Legend: **Peak** = July and August, 2025 vs 2019; **Non-Peak** = January through June and October through December, 2025 vs 2019; **Fall** = September and October, 2025 vs 2019; **Spring** = May and June, 2025 vs 2019; and **Winter** = January through April and November through December, 2025 vs. 2019

Source: Tourism PEI, CRM Occupancy Database

Visitor Spending



Prince Edward Island – proportion of annual non-resident spending, main season vs off-season



Legend: Main Season = May through October; Secondary Season = November through April

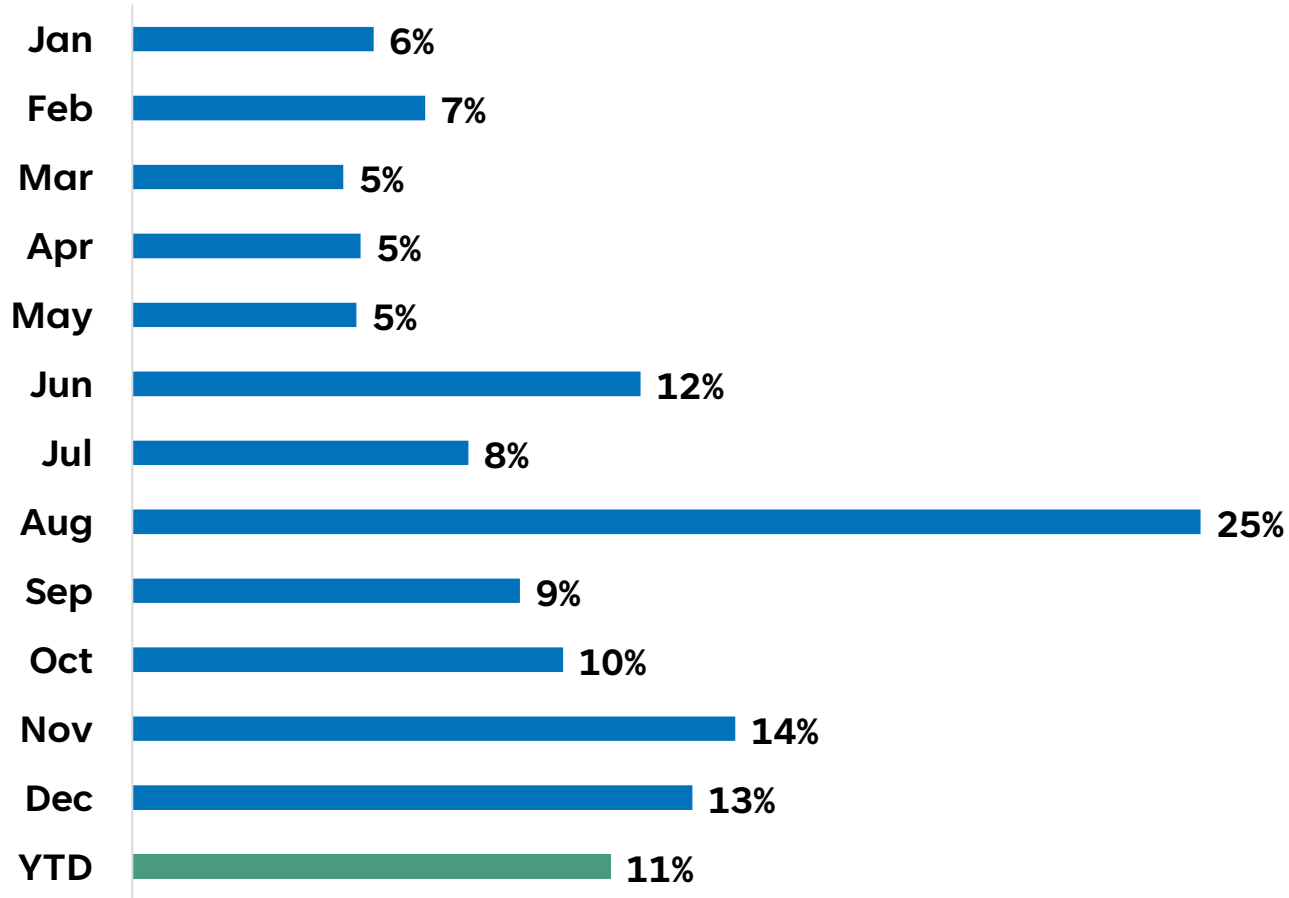
Source: Tourism PEI, Visitor Value Model, *preliminary estimates.

*2025 was a record-setting tourism year for PEI,
but challenges exist with potential to impede growth*

Bridge Traffic



Monthly bridge traffic 2025 vs 2024



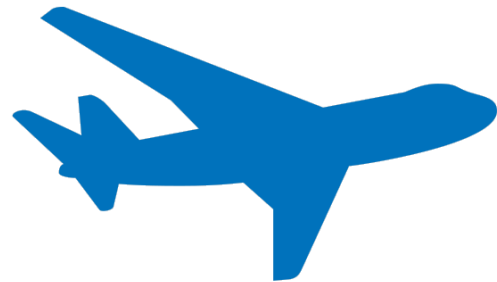
Key Insights

- Approximately 78% of all visitor traffic departs PEI via the Confederation Bridge, making it an important proxy for visitor volume to the Island.
- The Confederation Bridge has set new monthly traffic records 21 out of the last 24 months.
- Dramatic increase in bridge traffic for August, following the reduction in bridge fees.
- Overall, bridge traffic is up 11% compared to 2024.



Air Traffic

Monthly air traffic 2025 vs 2024



(enplanements and deplanements)

▼ 5%
YTD



(Air Seat Capacity)

▼ 7%
YTD



(Load Factor)

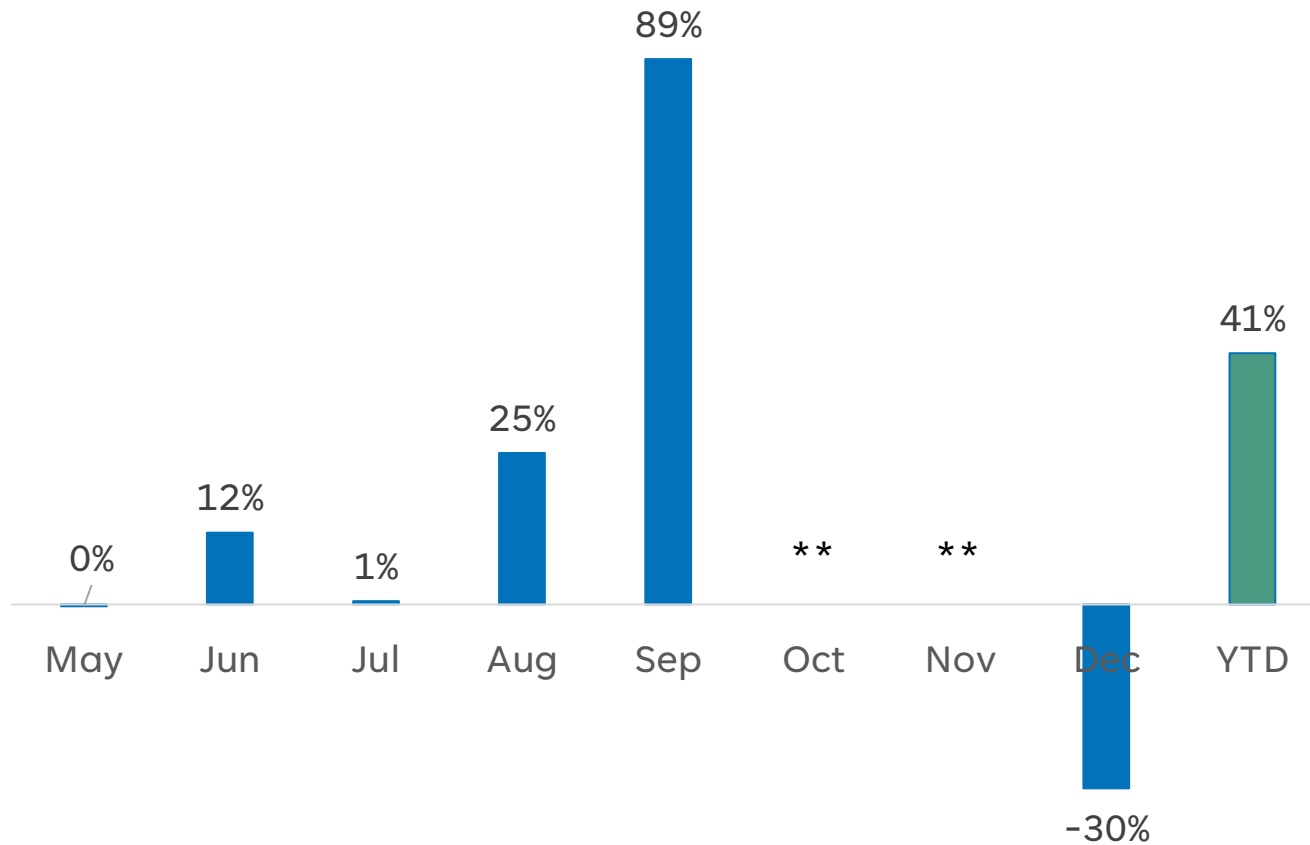
▲ 2%
YTD

Key Insights

- Approximately 6% all visitor traffic departs PEI via the Charlottetown Airport.
- Air access is foundational for facilitating long-haul travel.
- In 2025, PEI faced capacity constraints but maintained strong load factors, demonstrating continued demand for PEI flights.
- The Air Canada flight attendant strike resulted in suspended flights during August.
- May, September, and October 2025 achieved new monthly records for air traffic.

Ferry Traffic

Monthly ferry traffic 2025 vs 2024



Key Insights

- Approximately 8% of all visitor traffic departs PEI via the Wood Islands ferry terminal.
- There were new monthly ferry traffic records achieved in June, September and October, with overall traffic up 41% over 2024
- Overall, there has been a 74% reduction in the number of cancelled sailings in 2025 compared to 2024.
- Dredging at the ferry terminal has already begun and is on schedule to be completed prior to the start of the 2026 season.



Cruise Traffic



Key Insights

- Approximately 8% of all visitor traffic arrives via cruise ship.
- Cruise is an important segment for introducing first-time visitors to PEI, with 81% being first-time visitors, and 86% stating their intention to visit PEI in the future.
- 2024 was a record-setting year for cruise traffic, with 2019 being the previous record year.

Source: Port Charlottetown, total passengers and crew

Cruise&Ferry Itinerary Planning

THE ESSENTIAL GUIDE TO CRUISE ROUTE DESIGN

2026



Paid Overnight Stays

2025 vs 2024

Fixed-Roof



761,462

+10% over 2024

+

Campground



365,232

+1% over 2024

=

Overnight Stays



1,126,694

+7% over 2024

Regional Dispersion



PEI tourism regions room-nights sold, 2025 vs 2024



▲ 20% 🔥



▲ 18% 🔥



▲ 28% 🔥



▲ 19% 🔥

DISCOVER
CHARLOTTETOWN
PRINCE EDWARD ISLAND

▲ 2%

EXPLORE
Summerside
The City by the Sea

▲ 9%

🔥 = Year-to-date, record-setting pace

Source: Tourism PEI, Occupancy Database, 2025

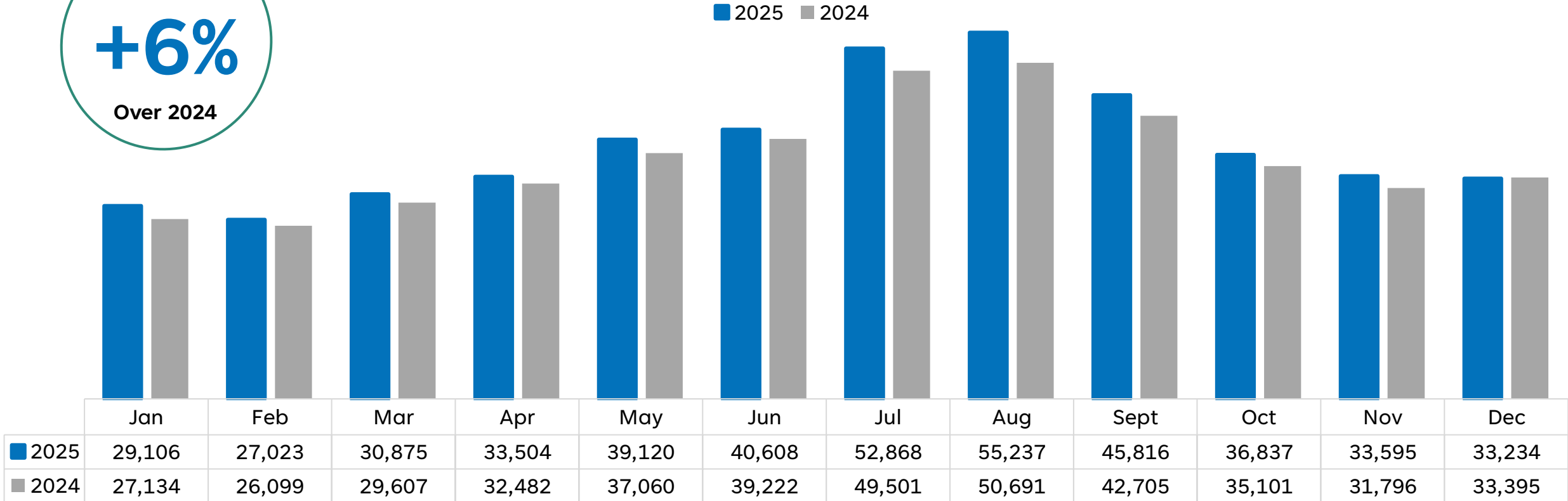
Food and Drinking Place Receipts



Prince Edward Island - January through December, CAD thousands

2025 YTD
+6%
Over 2024

■ 2025 ■ 2024



Source: Statistics Canada. Table 21-10-0019-01 Monthly survey of food services and drinking places (CAD x 1,000)

Golf PRINCE EDWARD ISLAND

2025 TOTALS

Vacation Bookings

616

+9%

over, 2024

Vacation Sales

\$2.63M

+25%

over 2024

AVG Booking Value

\$4,277

+14%

over 2024

AVG Length of Stay

3.84 nights

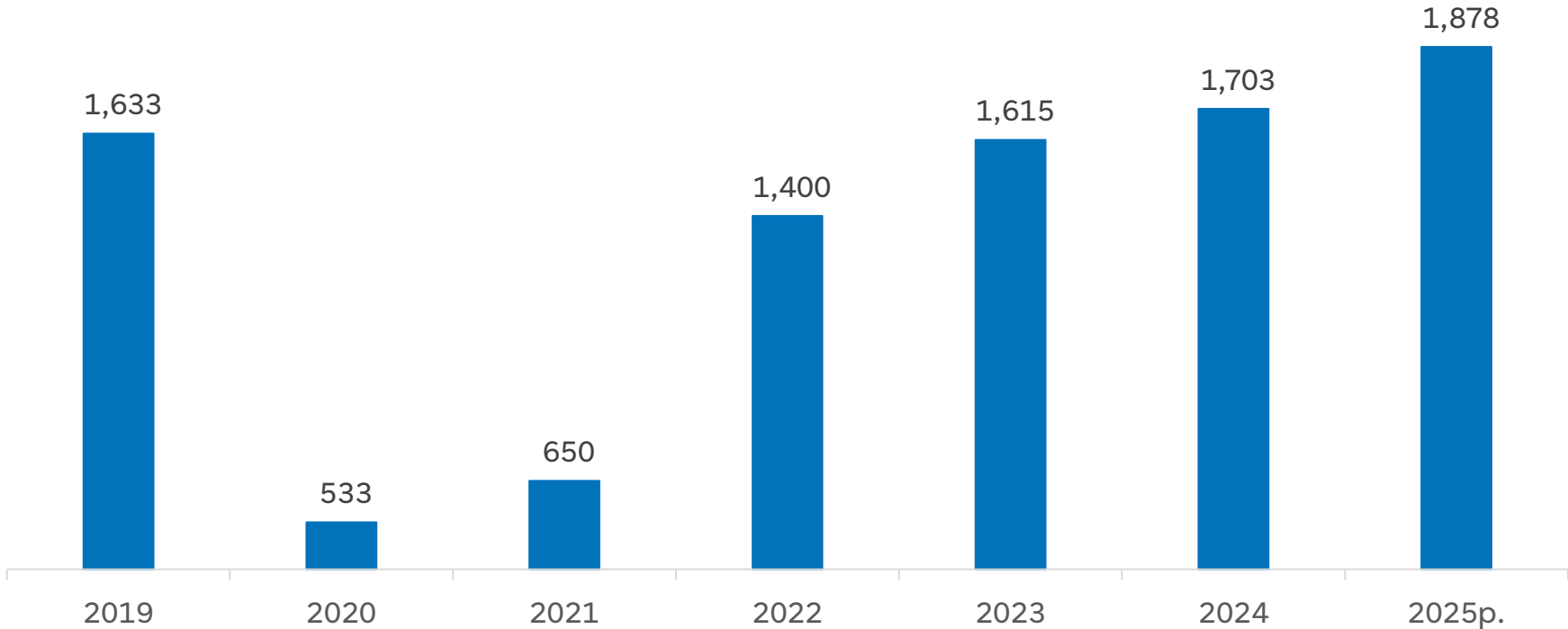
+11%

over 2024

Visitor Volume



Annual Non-Resident Visitors to PEI



2025
+10%
Over 2024

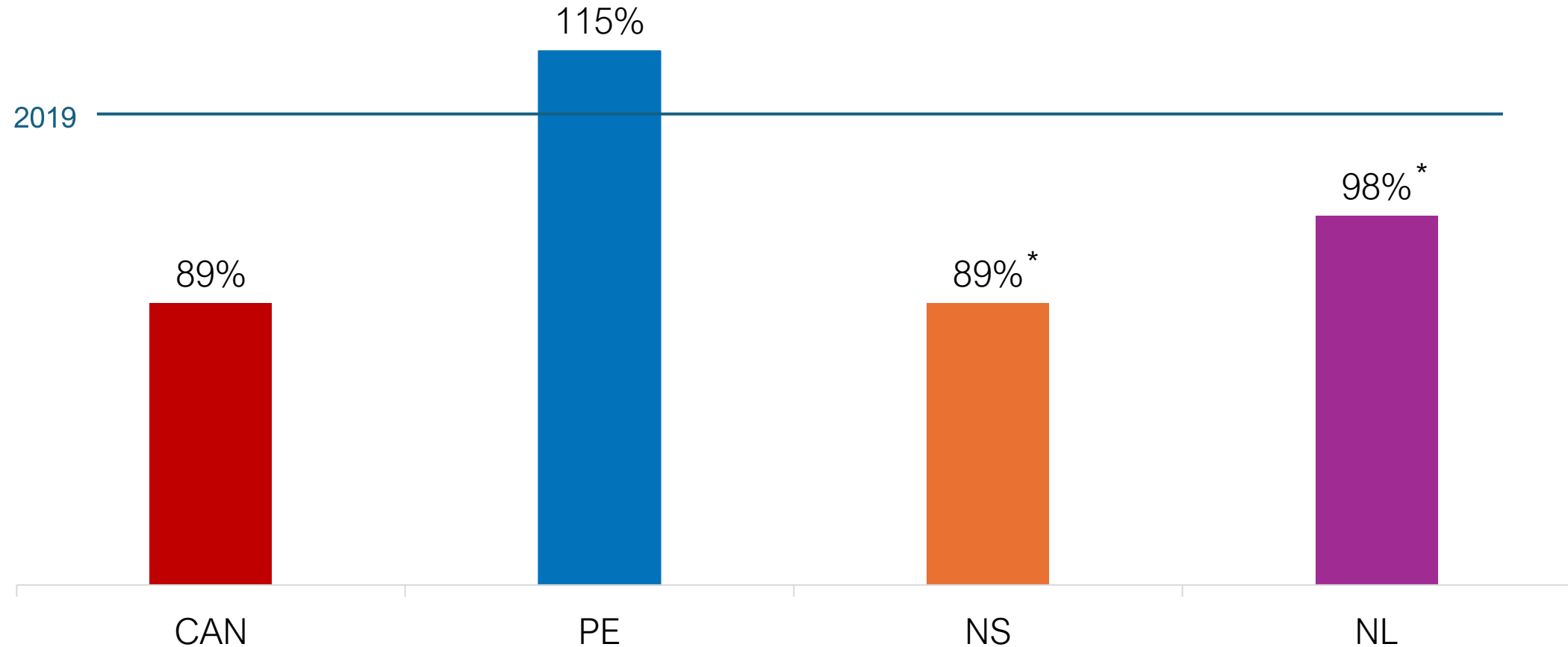
p. = preliminary estimate

Source: Tourism PEI, Value Model, March 2026

*PEI may be Canada's smallest province, but we are a
national tourism leader*

Visitor Volume

2025 projected as a percent of 2019 levels



Regional Occupancy Summary

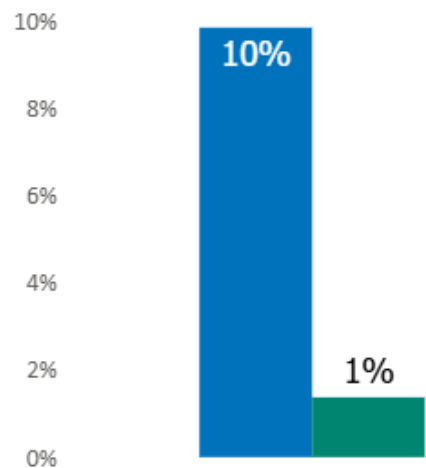


Year-to-date, room-nights sold over 2024



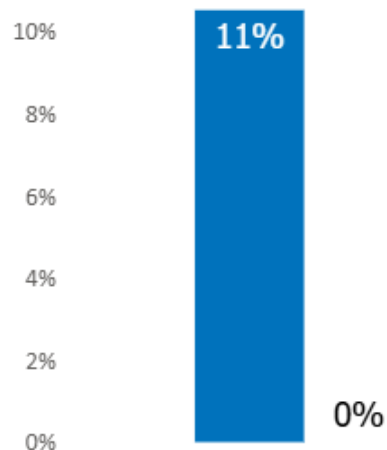
as of Dec 31 2025

● PEI ● NB



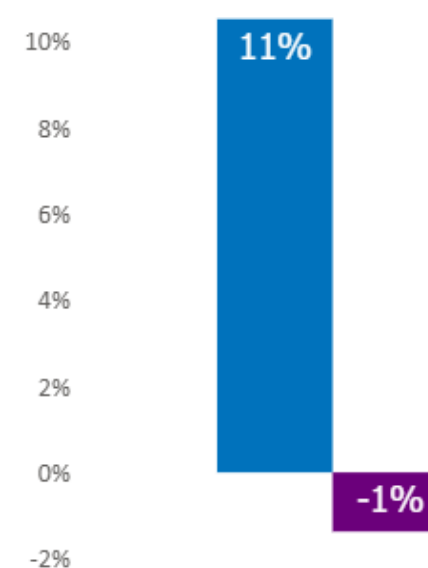
as of Sept 30 2025

● PEI ● NS



as of Sept 30 2025

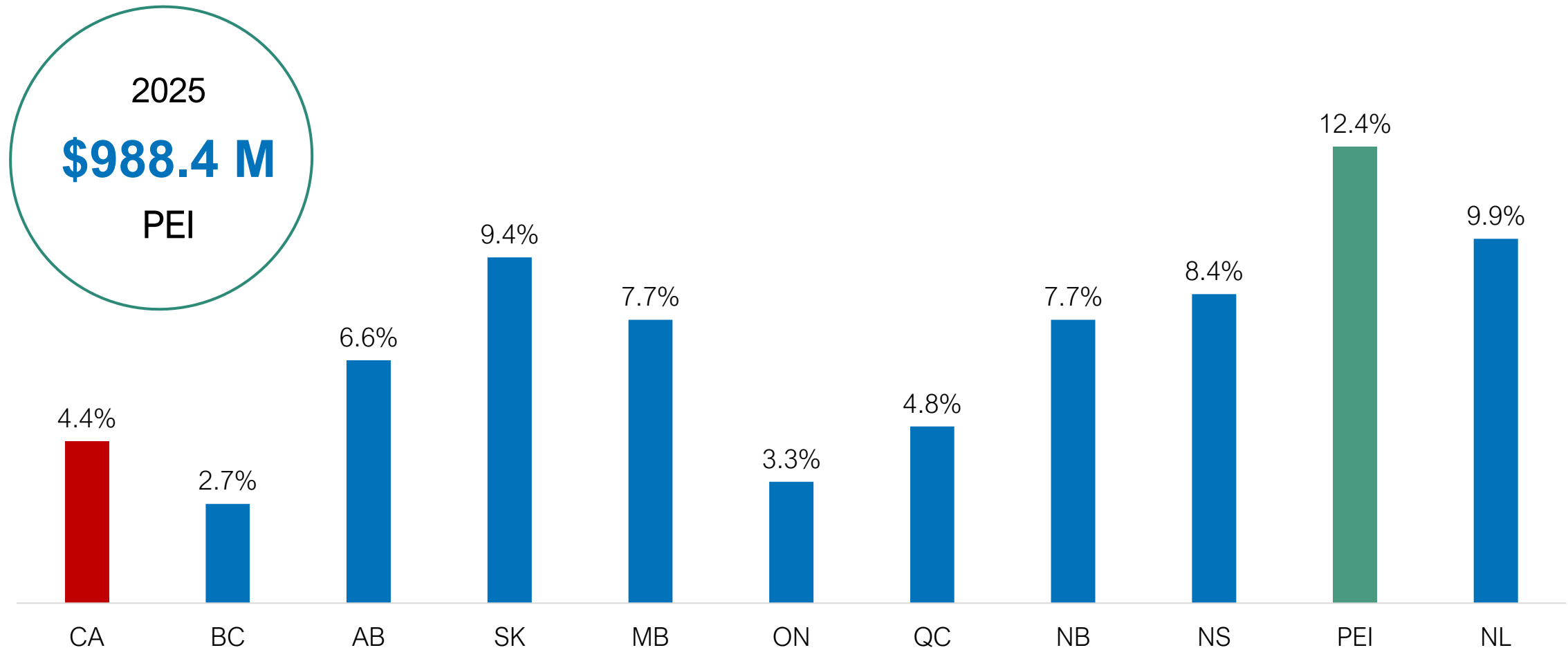
● PEI ● NL



Sources: Tourism PEI, Government of Nova Scotia, Government of New Brunswick, Government of Newfoundland and Labrador. All data subject to ongoing revisions from the various sources of data.

Visitor Spending

Annual Visitors Spending Growth, 2025 vs 2024



Source: Destination Canada

Looking to 2026



2026 YTD Performance

Bridge Traffic 
as of February 28, 2026



+17%

Air Traffic
as of February 28, 2026



+5%

Room-Nights Sold 
as of January 31, 2026



+14%

 YTD record-retting pace

Source: Straight Crossing Bridge Limited, Charlottetown Airport Authority, and Tourism PEI CRM Occupancy Database

Golf PRINCE EDWARD ISLAND

2026

as of February 28, 2026

Vacation Bookings

365

+53%

over 2025

Vacation Sales

\$2.3M

+81%

over 2025

AVG Booking Value

\$6,294

+18%

over 2025

AVG Length of Stay

4.06 nights

+5%

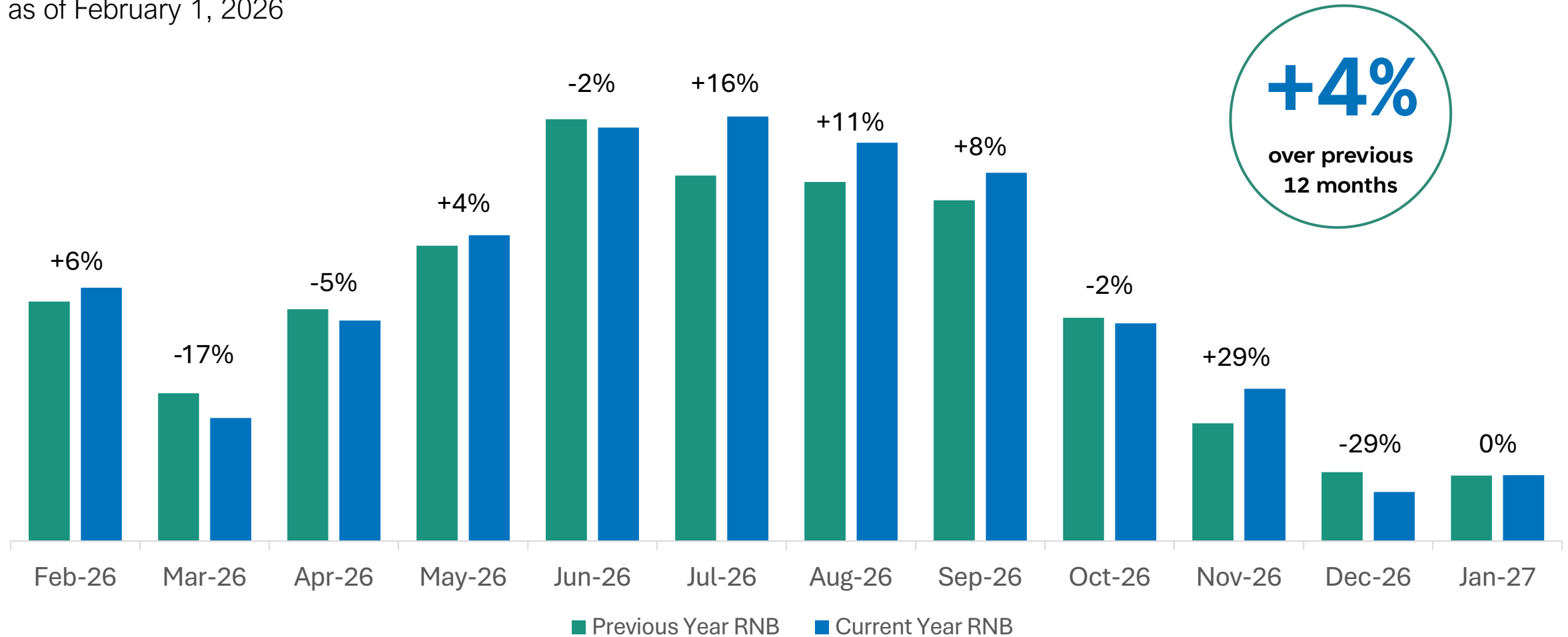
over 2025

Source: Golf PEI, compared to the same time previous year

Hotel Pacing



as of February 1, 2026



RNB: Room-nights Booked
Source: Hotel Pacing Reporting database.

Key Takeaways

2025 Summary



Market disruptions created an opportunity to capture new first-time domestic visitors, and PEI successfully targeted and capitalized on that opportunity.



PEI's strategic focus on four-season tourism and dispersion of visitor activity is achieving results.



2025 was a banner year for tourism on PEI, but challenges exist with the potential to impede growth.



PEI may be Canada's smallest province, but we are an aligned, ambitious, and focused local industry and a national tourism leader

2026 Considerations



We anticipate domestic markets will continue to be the main driver of visitation. We anticipate a light softening of the US market and modest growth from other international markets.



Current travel intent and pacing information for PEI is positive but does not suggest a repeat of the robust growth achieved in 2025, and external factors can materially influence outcomes



Increased frequency from Flair and WestJet to Calgary, a new Porter Montreal service, and larger Air Canada aircraft are contributing to an anticipated 8.5% summer capacity increase.



Ferry terminal dredging will be complete by the start of the season, and we have two functioning ferries, which should result in continued improvements in ferry service in 2026.

www.tourismpei.com/industry



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