
A PROFILE OF THE ANNE TOURISM MARKET: BASED ON THE 2007 EXIT SURVEY DATA

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1. INTRODUCTION

1.1 Background

Prince Edward Island (PEI), through Tourism Prince Edward Island (TPEI), has conducted exit surveys of visitors for over 25 years to identify the benefits of tourism to PEI, and to collect comprehensive statistics on these travellers and their trips. These exit surveys provide a wide range of information regarding tourists and the trip just completed. It has been conclusively demonstrated that exit surveys provide the most accurate information regarding visitors and their trips. Exit surveys should reflect the questions tourism decision-makers in both the private and public sectors have about the nature of tourism at their destination. These questions can be as varied as the stakeholders in the industry. They range from a need to statistically capture the size of the tourism industry to specific analysis on brand awareness or advertising effectiveness.

The exit survey was initially created to measure the volume of visitors and total tourism related expenditures; however, the survey quickly outgrew this initial mandate. It evolved and was being used to field more marketing-oriented questions. This approach of trying to make the core exit survey into a marketing research tool quickly showed its limitations. The survey grew in length to the point that by 2004 it took over 30 minutes to complete. Also, many marketing questions remained unanswered as the existing Survey was not able to accommodate additional issues.

In September 2006 the Tourism Research Centre (TRC) at the School of Business of the University of PEI was created. One of the objectives of the TRC was to revise the exit survey; both the questionnaire itself and the methodology. This was also connected to a mandate to make market research more focused and useful for all stakeholders in the tourism industry, particularly industry participants. Over the past 25 years, the needs of the industry have changed dramatically. They are facing a competitive landscape driven by a very demanding consumer.

Tourism operators are discovering that they are not facing a homogenous “tourism market”, but a multitude of different and very distinct market segments. Understanding these segments is the key to success in this new competitive industry. Tourism associations are facing questions, and need to measure the return on their efforts using timely data. The new exit survey provides a market research platform that collects data that will benefit all stakeholders in the industry, both operators and government agencies. The overall goal is to satisfy the needs of all stakeholders, and to make market research a useful tool to understand and segment current customers, examine emerging niche markets, and satisfy the need of smaller operators and associations.

The results of the exit survey will be made available in a timely manner to all stakeholders who wish to benefit from the results. The first report was released January 9, about 13 weeks after the end of the peak tourism season on September 30. This report is the first in a series of additional reports on the main season that are being released over the period from mid-January through to the end of March. The purpose of this report is to fully analyze the “Anne” visitors - those who travelled to PEI either primarily for the “world of Anne,” or who had visited Anne attractions while on PEI. This report only considers those who visited PEI during the period from June 27 (when the first completed survey was returned) to September 30, the cut-off date used for the report.

1.2 Objectives of the Study

The main objectives of the new exit survey are the following:

- To collect and distribute to all interested stakeholders statistics on the volume of visitors to PEI, and numerous indicators of the travel party and their travel experience. The indicators include:
 - point of entry and departure,
 - status of visitor based on first-time versus repeat visitor and daytrip or overnight visitor,
 - place or origin,
 - main purpose of trip,
 - size and ages of travel party,
 - other areas visited during the trip,
 - principal motivation for visiting PEI,
 - a summary of the activities engaged in while on PEI,
 - length of stay, in total, by region, and type of accommodation,
 - amount spent, in total, and in eight categories of expenditures,
 - frequency of visits to PEI,
 - ratings of six specific travel experiences,
 - overall view of PEI as a travel destination, and
 - basic demographic data of the visitors.
- To collect critical data to measure the overall importance of tourism to Prince Edward Island.
- To identify key market segments of visitors to PEI by travel motivation and activity.
- To gain a complete understanding regarding why people visit PEI, and why others do not.

1.3 Summary

- Visitor surveys require forethought, care and attention in their design and implementation. This is not only because of the investment necessary for this type of study, but also because industry stakeholders rely extensively on the collected information.
- Access to up-to-date and reliable visitor information for the destination is fundamental to the success of the tourism industry. Data sources that are rich both in scope and reliability are invaluable to a large number of users including tourism planners, marketers, economists, politicians, global tour operators, civic leaders, as well as persons making their living from investing and working in this sector.
- Today's tourism markets are not homogenous. Business is driven by a multitude of different and very distinct market segments. Understanding who these segments are and what motivates them

is the key to success in this highly competitive industry.

- The 2007 exit survey represents a major step in understanding the various market segments that visit PEI.
- The survey introduces a complete redesign and modernization of the exit surveys that have been completed in the past. The methodology has been redeveloped and much of the information the new exit survey collects is new.
- The results of the exit survey will be made available in a timely manner to all stakeholders who wish to benefit from the results. The first report was released 13 weeks after the end of the peak tourism season on September 30.
- The purpose of the recently released first report was to provide an overall snapshot of those who visited PEI during the period from June 27 (when the first completed survey was returned) to September 30, the cut-off date used for the report.
- This report is the first of at least six additional reports on the main season that will be released over the following ten weeks.

2. METHODOLOGY

2.1 Overview

Starting in the fall of 2006, the Tourism Research Centre (TRC) re-designed the exit survey and methodology to be used to implement the 2007 exit survey. The new survey began testing in May 2007 and was fully implemented in mid-June 2007. The new exit survey will collect data over a 12-month period, which is a significant change when compared to previous exit surveys. Prior to 2007, the exit survey was only administered in the June to September time period. The new methodology represents a significant shift in how the tourism industry collects information on visitors to PEI.

The 2007 exit survey with a new methodology has the potential to shape industry and government policy and marketing for travel and tourism in Prince Edward Island, but also to better understand visitors' behaviours and the impact of tourism on our community. Thus, the study will provide resources and insight information for better understandings of travellers and enable an invaluable contribution to tourism research while focusing on the major objectives of the study.

The survey questionnaire was significantly modified to collect relevant information for use by the industry and government. A copy of the new questionnaire is available on the TRC Website (<http://www.trc.upei.ca/exitsurvey>). In summary, questions were added, omitted, and re-structured for a cleaner survey that is easier to complete and takes the respondent less time to complete.

2.2 Data Collection Method Used for 2007 Exit Survey

The 2007 exit survey is now administered year-round instead of being restricted to the June to September period. Given the issues with phone surveys, it was decided a new approach was needed for data collection. At the bridge, an envelope containing a bilingual covering letter describing the survey, both an English and French survey, and a pre-paid return envelope is distributed on various days during the week to every non-Island vehicle. To date, the response rate to this survey distribution method has been very high - approximately 22% - with very high quality data collected.

At the ferry and airport, a self-administered survey is conducted. At these two departure points there are delays between the visitor arriving at the location and leaving the Island. Consequently, there is a captive market of visitors exiting PEI. This allows for surveys to be completed on site. In certain cases, visitors wish to take the survey with them thus are supplied with a stamped return envelope. The response rate to this survey distribution method has been very high with about 72% of those approached agreeing to complete the survey.

2.3 Sample Size and Distribution by Exit Point, Season, and Origin of Visitor

The goal over the full year was to have 4,150 surveys completed. In terms of statistical accuracy, a survey of this sample size has a sampling error of 1.5% with a 95% confidence interval. That is, if all tourists who visited PEI were surveyed, we would be 95% confident that the results of the exit survey would fall within a range of plus or minus 1.5% of the results of a summary of all visitors. An alternative way to picture this statistical concept is that if the same survey were conducted 100 times, the results reported here would be within a range of plus or minus 1.5% 95 times out of the 100 times the survey was conducted.

The distribution of surveys by exit point, season, and origin of the visitor was based on traffic

patterns as reported by the bridge, ferry, and airport, and the occupancy data collected by Tourism PEI. In summary, of the 4,150 surveys that were to be completed over the year, 65% or 2,700 were to be at the Bridge, 20% or 830 at the ferry, and 15% or 620 at the airport. The mix by visitor origin was 57% to Canadians, 29% to Americans, and 14% to visitors from other countries. The largest visitor markets surveyed were: Ontario, New England, Nova Scotia, New Brunswick, the rest of the US, Quebec, and the rest of Canada. The year was split into five seasons with the portion of the surveys completed as follows:

Main tourist month of July	28.8%
Main tourist month of August	29.7%
Spring shoulder season (May & June)	15.6%
Fall shoulder season (September & October)	16.8%
Winter Season (November to April)	9.1%

It should be noted that this distribution does not exactly match the actual travel data. In research, an exact match of sample to overall population data seldom occurs since certain travel markets must be over-sampled to ensure a valid sample is collected. In addition, for efficiency in data collection, certain exit points are over-sampled. This has occurred in the research design used in this study.

2.4 Discussion of the Data Used in this Exit Survey Report

As discussed earlier, the exit survey will be administered over the full year from mid-June 2007 to mid-June 2008. This report only considers the period from June 27 to September 30, 2007, which would be considered the main 2007 tourist season. In this period, a total of 3,173 surveys were collected. This is about 200 more surveys than the number that was planned based on the research plan and further lowers the survey's sampling error. This result also supports the revised methodology; reliable data can be collected using this new method.

The distribution of surveys actually collected over the three-month period indicates that the data actually collected closely matched the original sampling plan. With the data collected, it must be appropriately weighted to derive total information for all visitors to PEI. Weighting is used to improve the precision of the results for the data collected. For example, assuming the exit survey data is based on a random and representative sample of the population, the goal is to apply the sample data to the complete population of visitors. Given variations in respondent selection by exit point, it is highly unlikely that the survey data actually collected perfectly matches the exact population of visitors.

For example, visitors exiting PEI via the ferry were over-sampled. That is, on a percentage basis, more surveys were completed by visitors leaving PEI by ferry than should have been completed based on the actual traffic data. This is also the case for visitors from Nova Scotia and Ontario. In contrast, fewer surveys were completed by visitors from Newfoundland, the Mid-Atlantic States, and from overseas countries. In other words, the sample used in this study does not exactly match the "true" population of visitors. Given the over- and under-sampling that was part of the survey methodology this is not a surprise. However, the implication is that some statistical estimation and weighting is needed.

Without going into a detailed discussion of statistics, a direct or design weight is used to adjust visitor survey results so they match the overall population of all visitors. For example, from actual traffic data, we may know that 85.3% of PEI's overnight visitors are from Canada, 9.8% from the United States, and 4.9% from international countries. But, the sampling method used will under-sample the Canadian visitor group and over-sample the American and international visitor group. In presenting the results, design weights would be used that would "correct" the percentages to 85.3%, 9.8%, and 4.9%, of the total results, respectively. Therefore, the weights assigned to the surveys are used to obtain an exact match to the corresponding reliable sources of data for the overall population of visitors. The underlying sources are the actual traffic data from the three exit points, and the monthly occupancy reports from Tourism PEI.

3. A PROFILE OF TRAVELLERS WHO VISITED ANNE OF GREEN GABLES ATTRACTIONS

3.1 Volume of Travellers

Highlights:

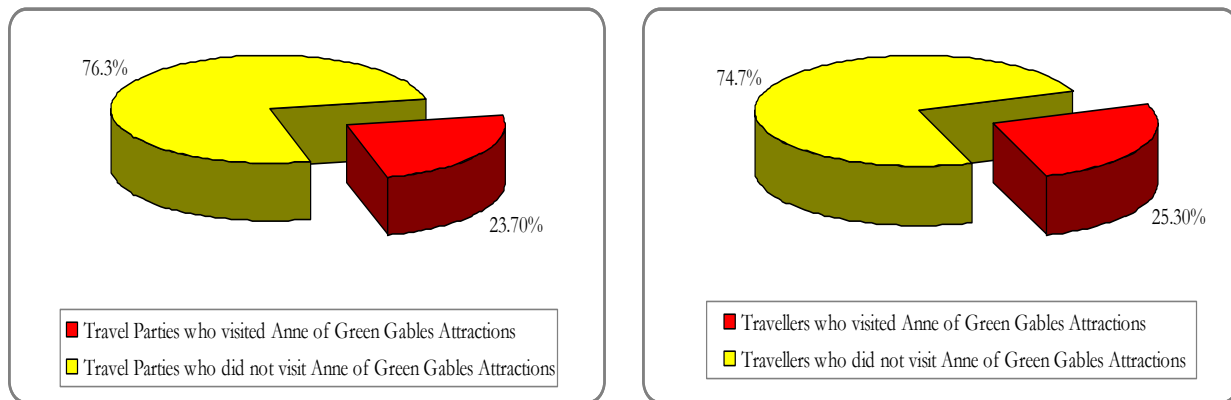
- A total of 53,000 overnight pleasure travel parties visited Anne of Green Gables attractions during the period from June 27 to September 30, 2007. This was equivalent to 23.7 percent of total pleasure visitors to PEI.
- The number of people per travel party averaged 3.2 travellers.
- As a result, a total of 169,500 travellers or 25.3% of total overnight pleasure travellers visited Anne attractions during the study period in 2007.

Table 3.1 Volume of Travellers who visited Anne of Green Gables Attractions

	Number of Travel Parties estimated	% of Parties	Number of Travellers estimated	% of Travellers
Overnight Pleasure	223,378		670,651	
Travellers who visited Anne of Green Gables Attractions	52,973	23.7%	169,514	25.3%

Note: Data is for the Period from June 27 to September 30, 2007.

Figure 3.1 Travellers who visited Anne of Green Gables Attractions vs. those who did not visit



3.2 Primary Reasons for the Trip

Highlights:

- More than one in four visitors on pleasure trips (27.8 percent) visited Anne attractions. This ratio fell to less than one in ten (8.9 percent) for visitors whose main trip purpose was to visit friends or relatives.
- Pleasure visitors accounted for 91.7 percent of total visitors to Anne attractions (48,600 parties). VFR visitors accounted for 7.5 percent (4,000 parties) and visitors travelling for other purposes accounted for the remaining 0.9 percent (500 parties).

Table 3.2 Primary Reasons for the Trip

Primary Reason for the Trip	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Pleasure	48,561 (91.7%)	27.8%	126,369 (74.2%)	72.2%	174,930 (78.3%)
VFR	3,952 (7.5%)	8.9%	40,539 (23.8%)	91.9%	44,491 (19.9%)
Other	459 (0.9%)	11.6%	3,498 (2.1%)	88.4%	3,957 (1.8%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.3 Geographical Tourism Markets

Highlights:

- There were very significant differences in the ratios of visitation to Anne attractions based on visitors' origins.
- In total 20.5 percent of Canadian visitors visited Anne attractions. Visitation ranged from a low of 7.7 percent for visitors from New Brunswick to a high of 49.4 percent for visitors from British Columbia.
- The overall visitation ratio for US visitors averaged 39.3 percent. It ranged from a low of 30.3 percent for visitors from New England to a high of 51.1 percent for visitors from the North and South Central States.
- International visitors had the highest overall ratio of visitation (49.0 percent). The ratio ranged from a low of 44.4 percent for visitors from Europe to a high of 85.0 percent for visitors from Japan.
- In terms of the actual number of visitors to Anne attractions, Canadians accounted for 73.7 percent of total visitors (39,000 parties); the US 16.2 percent (8,600 parties), while International markets accounted for 10.1 percent (5,300 parties).
- On an individual market basis, visitors from Ontario were first with 21.4 percent of total visitors to Anne attractions (11,300 parties), Nova Scotia was second at 19.1 percent (10,100 parties), while Quebec accounted for 18.0 percent (9,500 parties).
- Upon first glance at Table 3.3 it appears that the further visitors travelled to reach the Island, the more likely they were to visit Anne attractions. This is likely related to repeat visitation (see section 3.10); however, visitors from Newfoundland and Labrador are the second most-likely to visit an Anne attraction despite the province's proximity to PEI.

Table 3.3 Geographical Tourism Markets

Geographical Tourism Market	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Canada	39,042 (73.7%)	20.5%	151,572 (88.8%)	79.5%	190,614 (85.3%)
Newfoundland & Lab.	1,230 (2.3%)	47.1%	1,380 (0.8%)	52.9%	2,610 (1.2%)
New Brunswick	3,629 (6.9%)	7.7%	43,281 (25.4%)	92.3%	46,910 (21.0%)
Nova Scotia	10,112 (19.1%)	15.3%	55,860 (32.8%)	84.7%	65,972 (29.5%)
Quebec	9,534 (18.0%)	31.7%	20,526 (12.0%)	68.3%	30,060 (13.5%)
Ontario	11,312 (21.4%)	30.9%	25,285 (14.8%)	69.1%	36,597 (16.4%)
Alberta	1,624 (3.1%)	31.5%	3,527 (2.1%)	68.5%	5,151 (2.3%)
British Columbia	1,261 (2.4%)	49.4%	1,293 (0.8%)	50.6%	2,554 (1.1%)
Rest of Canada	340 (0.6%)	44.7%	420 (0.2%)	55.3%	760 (0.3%)
United States	8,600 (16.2%)	39.3%	13,278 (7.8%)	60.7%	21,878 (9.8%)
New England	3,344 (6.3%)	30.2%	7,726 (4.5%)	69.8%	11,070 (5.0%)
Middle Atlantic	1,023 (1.9%)	48.6%	1,083 (0.6%)	51.4%	2,106 (0.9%)
South Atlantic	1,241 (2.3%)	49.1%	1,284 (0.8%)	50.9%	2,525 (1.1%)
North & South Central	2,047 (3.9%)	51.1%	1,962 (1.2%)	48.9%	4,009 (1.8%)
Rest of US	945 (1.8%)	43.6%	1,223 (0.7%)	56.4%	2,168 (1.0%)
International	5,329 (10.1%)	49.0%	5,554 (3.3%)	51.0%	10,883 (4.9%)
Europe	2,971 (5.6%)	44.4%	3,725 (2.2%)	55.6%	6,696 (3.0%)
Japan	834 (1.6%)	85.0%	147 (0.1%)	15.0%	981 (0.4%)
Other Countries	1,524 (2.9%)	47.5%	1,682 (1.0%)	52.5%	3,206 (1.4%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.4 Gender and Age of Travellers

Highlights:

- Female visitors were more inclined to visit Anne attractions (26.9 percent of females visited as compared to 22.3 percent of males).
- In terms of actual number of visitors to Anne attractions, females outnumbered males by a ratio of approximately 60:40.
- Visitors in the 18-24 age categories were least likely to visit Anne attractions (16.7 percent). Visitors in the 65-74 age categories were most likely to visit (29.4 percent).
- Visitors in the middle age categories (35-54) accounted for a leading 52,900 Anne visitors (31.2% of total). Seniors (55 plus) accounted for only slightly less (52,200 visitors or 30.8 % of total).
- Approximately 20 percent of total visitors to Anne attractions were children under the age of 18 (34,100 visitors). Children under the age of 18 also accounted for an identical 20 percent of visitors who did not visit Anne attractions.
- Overall visitation tended to be higher among older visitors (55 plus). The highest ratio of visitation was among visitors in the 65 to 74 age category (29.4 percent).

Table 3.4 Gender and Age of Travellers

Gender and Age of Travellers	Travellers who visited Anne of Green Gables Attractions		Travellers who did not visit Anne of Green Gables Attractions		Total
	169,514	25.3%	501,137	74.7%	
Gender					
Male	69,176 (40.8%)	22.3%	241,265 (48.1%)	77.7%	310,441 (46.3%)
Female	94,281 (55.6%)	26.9%	256,248 (51.1%)	73.1%	350,529 (52.3%)
Not Stated	6,057 (3.6%)	62.6%	3,624 (0.7%)	37.4%	9,681 (1.4%)
Age					
0 – 8	14,666 (8.7%)	23.4%	47,993 (9.6%)	76.6%	62,659 (9.3%)
9 – 17	19,385 (11.4%)	27.4%	51,298 (10.2%)	72.6%	70,683 (10.5%)
18 – 24	6,939 (4.1%)	16.7%	34,537 (6.9%)	83.3%	41,476 (6.2%)
25 – 34	17,277 (10.2%)	23.4%	56,622 (11.3%)	76.6%	73,899 (11.0%)
35 – 44	24,881 (14.7%)	22.3%	86,598 (17.3%)	77.7%	111,479 (16.6%)
45 – 54	27,971 (16.5%)	24.7%	85,385 (17.0%)	75.3%	113,356 (16.9%)
55 – 64	28,140 (16.6%)	27.7%	73,452 (14.7%)	72.3%	101,592 (15.1%)
65 – 74	20,028 (11.8%)	29.4%	48,150 (9.6%)	70.6%	68,178 (10.2%)
74 and over	4,147 (2.4%)	23.5%	13,526 (2.7%)	76.5%	17,673 (2.6%)
Not Stated	6,080 (3.6%)	63.0%	3,576 (0.7%)	37.0%	9,656 (1.4%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.5 Composition of Travelling Party and Average Party Size

Highlights:

- About 26.1 percent of families travelling with children visited Anne attractions. This was slightly higher than the 22.6 percent of adult only travel parties who visited.
- The highest individual visitation ratio was two adults with children (26.9 percent). The lowest ratio was one adult travelling alone (12.9 percent). Interestingly, a single adult travelling with one or more child was the second most likely segment to **not** visit an Anne attraction.
- Because of the relatively high ratio of family travellers the average party size for visitors to Anne attractions was 3.2 persons per party. The average party size for non-visitors was 2.94.

Table 3.5 Composition of Travelling Party and Average Party Size

Party Composition and Party Size	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Party Composition					
Travelling alone	1,574 (3.0%)	12.9%	10,587 (6.2%)	87.1%	12,161 (5.4%)
2 adults	26,423 (49.9%)	23.6%	85,594 (50.2%)	76.4%	112,017 (50.1%)
3 or more adults	6,165 (11.6%)	22.8%	20,863 (12.2%)	77.2%	27,028 (12.1%)
Alone with child(ren)	687 (1.3%)	19.2%	2,895 (1.7%)	80.8%	3,582 (1.6%)
2 adults with child(ren)	13,970 (26.4%)	26.9%	38,030 (22.3%)	73.1%	52,000 (23.3%)
3 or more adults with child(ren)	3,822 (7.2%)	25.0%	11,475 (6.7%)	75.0%	15,297 (6.8%)
Child(ren) travelling alone	81 (0.2%)	25.6%	235 (0.1%)	74.4%	316 (0.1%)
Not Stated	252 (0.5%)	25.8%	725 (0.4%)	74.2%	977 (0.4%)
Party Size					
Average Party Size	3.20		2.94		3.00
Avg. Number of Adult Travellers	2.46		2.35		2.38
Avg. Number of Male Adults	1.26		1.27		1.27
Avg. Number of Female Adults	1.40		1.31		1.33
Avg. Number of Children	1.83		1.89		1.87

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row; Family travel represents 31.7% of the total pleasure travel parties, including alone with children, 2 adults with children, and 3 or more adults with children in composition of travelling party.

3.6 Primary Destination of the Trip and Trip Duration

Highlights:

- Possibly because of the low VFR factor, a higher ratio of visitors whose primary destination was not PEI visited Anne attractions (36.6 versus 21.2 percent).
- Visitors to Anne attractions tended to be on longer trips (10.5 nights versus 7.2 nights for non visitors), and they stayed longer on the Island (5.4 nights versus 4.9 nights).

Table 3.6 Primary Destination of the Trip and Trip Duration

Primary Destination and Trip Duration	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Primary Destination					
Prince Edward Island	38,792 (73.2%)	21.2%	144,201 (84.6%)	78.8%	182,993 (81.9%)
Other Destinations	13,329 (25.2%)	36.6%	23,101 (13.6%)	63.4%	36,430 (16.3%)
Don't know	307 (0.6%)	22.0%	1,090 (0.6%)	78.0%	1,397 (0.6%)
Not Stated	545 (1.0%)	21.3%	2,013 (1.2%)	78.7%	2,558 (1.1%)
Average Trip Duration (For those who visited the stated destination)					
Total Nights of the Trip		10.52		7.20	7.99
Nights stayed in PEI		5.37		4.85	4.97
Nights stayed in NB		2.72		2.77	2.75
Nights stayed in NS		5.39		4.86	5.05
Nights stayed in NL		9.28		5.58	7.21
Nights stayed in Magdalen Isl.		5.26		9.40	9.15

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.7 Overnight Destinations in PEI

Highlights:

- Not surprisingly the highest ratio of visitors to Anne attractions was among visitors who identified Anne's Land as an overnight destination (29.5 percent).
- Visitation ratios ranged from a low of 17.6 percent for visitors to the North Cape Coastal region to the high of 29.5 percent for Anne's Land.
- Visitors staying in regions other than Anne's Land, and Charlottetown and Summerside were less likely to visit Anne attractions. This trend is likely related to the higher instances of VFR travellers and the distance to the Anne attractions.

Table 3.7 Overnight Destinations (Tourism Regions) in PEI *

Overnight Destinations in PEI	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Charlottetown	19,638 (29.8%)	26.0%	55,864 (28.6%)	74.0%	75,502 (28.9%)
Summerside	6,589 (10.0%)	25.7%	19,045 (9.8%)	74.3%	25,634 (9.8%)
North Cape Costal	3,527 (5.4%)	17.6%	16,564 (8.5%)	82.4%	20,091 (7.7%)
Anne's Land	25,226 (38.3%)	29.5%	60,176 (30.9%)	70.5%	85,402 (32.7%)
Charlotte's Shore	4,479 (6.8%)	19.0%	19,076 (9.8%)	81.0%	23,555 (9.0%)
Points East Costal	6,427 (9.8%)	20.9%	24,325 (12.5%)	79.1%	30,752 (11.8%)
Total Overnight Stays	65,886	25.2%	195,050	74.8%	260,936

Note: * Multiple responses; Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.8 Type of Accommodations

Highlights:

- Visitation to Anne attractions was highest for those staying in B&B's (39.5%); hotels/motels/resorts (32.9%); and Inns (31.3%). Anne visitors are much more likely to stay in these more expensive accommodations than non-Anne visitors.
- Of the travel parties visiting Anne attractions, 31.4% stayed in hotels, motels, or resorts, the main “money” segment of the accommodation business. This is much higher than the 21.5% of the non-Anne visitors who stayed in these types of accommodations. Only 9.9% of the Anne visitors stayed with friends or relatives versus the 25.9% of non-Anne visitors.
- Both Anne and non-Anne visitors were equally likely to stay in cottage and at campgrounds.
- As discussed in section 3.6, travellers who visited Anne attractions spent more time, on average, on PEI. This is supported by Table 3.8 which shows longer stays by those who visited Anne attractions versus those who did not in each accommodation type, except “other”.

Table 3.8 Type of Accommodations used in PEI *

Type of Accommodations	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total	
	52,973	23.7%	170,405	76.3%	223,378	100.0%
Hotel/Motel/Resort	20,967 (31.4%)	32.9% (3.03)	42,765 (21.5%)	67.1% (2.54)	63,731 (24.0%)	(2.69)
Inn	3,714 (5.6%)	31.3% (2.77)	8,168 (4.1%)	68.7% (2.62)	11,883 (4.5%)	(2.67)
Cottage/Cabin	12,470 (18.6%)	23.8% (7.21)	39,897 (20.0%)	76.2% (6.71)	52,367 (19.7%)	(6.83)
Bed & Breakfast/Tourist Home	7,639 (11.4%)	39.5% (3.34)	11,687 (5.9%)	60.5% (2.76)	19,326 (7.3%)	(2.98)
Camping/Trailer Park	14,413 (21.6%)	25.6% (5.82)	41,920 (21.0%)	74.4% (4.84)	56,333 (21.2%)	(5.07)
Home of Friends or Relatives	6,618 (9.9%)	11.4% (7.12)	51,673 (25.9%)	88.6% (4.43)	58,293 (21.9%)	(4.73)
Other (e.g, Hostel)	1,045 (1.6%)	25.5% (4.56)	3,047 (1.5%)	74.5% (9.87)	4,093 (1.5%)	(8.51)
Total Stays	66,866	25.1%	199,157	74.9%	266,026	100.0%

Note: * Multiple responses. The numbers in the parentheses in the number columns indicate % within the column. For example, 31.4% of the travel parties visiting Anne attractions stayed in hotels, motels, or Inns. This is much higher than for non-Anne visitors. The numbers in parentheses in the percentage columns indicate the average number of nights stayed in each type of accommodations. For example, the travel parties visiting Anne attractions stayed an average of 3.03 nights in hotels, motels, or Inns. Again, this is much higher than for non-Anne visitors.

3.9 Rental Car Usage and Location

Highlights:

- A much higher ratio of visitors travelling in rental cars visited Anne attractions (47.9 percent versus 21.5 percent travelling by other means). The use of rental cars is often associated with visitors travelling from long distances, or those who are more willing to spend while travelling.
- Rental car users accounted for 17.2 percent of total visitors to Anne attractions.
- Over half of visitors who rented cars in Nova Scotia or in the US visited Anne attractions. This reinforces the first point made above. Interestingly, those renting cars in New Brunswick were significantly less likely to visit Anne attractions. In section 3.3 it was discussed how visitors from New Brunswick had very low visitation rates to Anne attractions. It's difficult to say if these two facts are related.

Table 3.9 Rental Car Usage and Location

Rental Car Usage and Location	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Rental Car Usage					
Yes	9,133 (17.2%)	47.9%	9,922 (5.8%)	52.1%	19,055 (8.5%)
No	43,840 (82.8%)	21.5%	160,483 (94.2%)	78.5%	204,323 (91.5%)
Location Car was Rented					
Prince Edward Island	2,680 (29.3%)	46.5%	3,080 (31.0%)	53.5%	5,760 (30.2%)
Nova Scotia	3,711 (40.6%)	51.3%	3,519 (35.5%)	48.7%	7,230 (37.9%)
New Brunswick	389 (4.3%)	30.2%	901 (9.1%)	69.8%	1,290 (6.8%)
Other Provinces	1,246 (13.6%)	44.2%	1,574 (15.9%)	55.8%	2,820 (14.8%)
United States	1,106 (12.1%)	56.6%	848 (8.5%)	43.4%	1,954 (10.3%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.10 Type of Visitation

Highlights:

- An equal number of first-time visitors were Anne and non-Anne visitors.
- However, first-time visitors visited Anne attractions at more than three times the ratio of repeat visitors (50.0 percent versus 13.7 percent).

Table 3.10 Type of Visitation

Type of Visitation	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
First-Time Visitors	30,667 (57.9%)	50.0%	30,635 (18.0%)	50.0%	61,302 (27.4%)
Repeat Visitors	21,901 (41.3%)	13.7%	138,534 (81.3%)	86.3%	160,435 (71.8%)
Not Stated	405 (0.8%)	24.7%	1,236 (0.7%)	75.3%	1,641 (0.7%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.11 Primary Feature that attracted First-Time Visitors to PEI

Highlights:

- Not surprisingly, if visitors indicated that the “World of Anne of Green Gables and Lucy Maud Montgomery” was the primary feature that attracted them to PEI, they were very likely to have visited Anne of Green Gables attractions while visiting the Island (97.4 percent did).
- In terms of visitors to Anne attractions, the largest share (39.2 percent - equivalent to 12,000 parties) identified the natural beauty and pastoral setting as the primary feature that attracted them to the Island. A majority of these first-time visitors visited Anne attractions. The world of Anne of Green Gables and Lucy Maud Montgomery ranked second accounting for approximately 6,400 travel parties or 20.7 percent of total visitors to Anne attractions.
- Beaches and coast line ranked third as a source of visitors to Anne attractions (5,500 parties or 17.9 percent of total visitors); however, only 38.6 percent of all visitors who cited Beaches as a main reason for visiting the Island visited Anne attractions during their trip.
- First-time visitors who stated the primary feature that attracted them to PEI was Canada’s birthplace attractions would be considered cultural tourists and they too were more likely to visit Anne attractions.

Table 3.11 Primary Feature that attracted First-Time Visitors to PEI

Primary Feature	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Natural beauty and pastoral settings	12,012 (39.2%)	53.4%	10,481 (34.2%)	46.6%	22,493 (36.7%)
Beaches and coast line	5,492 (17.9%)	38.6%	8,723 (28.5%)	61.4%	14,215 (23.2%)
World of Anne of Green Gables and Lucy Maud Montgomery	6,359 (20.7%)	97.4%	172 (0.6%)	2.6%	6,531 (10.7%)
Canada birthplace attractions	268 (0.9%)	67.7%	128 (0.4%)	32.3%	396 (0.6%)
Golf	268 (0.9%)	25.1%	799 (2.6%)	74.9%	1,067 (1.7%)
Culinary experience	477 (1.6%)	41.9%	662 (2.2%)	58.1%	1,139 (1.9%)
Outdoor activities	361 (1.2%)	41.0%	519 (1.7%)	59.0%	880 (1.4%)
Other features	3,216 (10.5%)	30.6%	7,289 (23.8%)	69.4%	10,505 (17.1%)
Not stated	2,216 (7.2%)	54.4%	1,861 (6.1%)	45.6%	4,077 (6.7%)

Note: * First-time visitors' responses only; Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.12 Last Trip to PEI and Number of Times visited in the Past 5 Years

Highlights:

- The largest number of returning visitors who visited Anne attractions (approximately 6,300 parties or 28.6 percent) had not been to the Island in five or more years.
- Although the ratio of visitors who had visited the Island the previous year and visited Anne attractions on their return visit this year was low (26.2 percent), the number of visitors in this category is so high they ranked second, accounting for 5,700 visiting parties or 26.2 percent of total attraction visitors.
- The highest ratio of visitation to Anne attractions was for visitors returning after four years - 30.3 percent of them visited an Anne attraction.
- It should be noted that Table 3.12 does not capture data on return visitation to Anne attractions – it is simply a return visit to PEI regardless of what activities were completed on the previous visit.

Table 3.12 Last Trip to PEI and Number of Times visited in the Past 5 Years *

Last Trip to PEI & Number of Times visited	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	21,901	13.7%	138,534	86.3%	160,435
Last Trip to PEI					
This Year (2007)	3,148 (14.4%)	8.6%	33,668 (24.3%)	91.4%	36,816 (22.9%)
One year ago (2006)	5,738 (26.2%)	10.6%	48,632 (35.1%)	89.4%	54,370 (33.9%)
Two years ago (2005)	2,729 (12.5%)	13.2%	17,934 (12.9%)	86.8%	20,663 (12.9%)
Three years ago (2004)	1,332 (6.1%)	18.8%	5,739 (4.1%)	81.2%	7,071 (4.4%)
Four years ago (2003)	1,961 (9.0%)	30.3%	4,509 (3.3%)	69.7%	6,470 (4.0%)
More than 5 years ago (2002 & earlier)	6,254 (28.6%)	23.0%	20,918 (15.1%)	77.0%	27,172 (16.9%)
Not Stated	737 (3.4%)	9.4%	7,134 (5.1%)	90.6%	7,871 (4.9%)
Average Number of Times visited in the Past 5 Years	5.14		7.45		7.17

Note: * Repeat visitors' responses only; Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.13 Other Travel Activities participated in

Highlights:

- The leading other activities visitors to Anne attractions took part in included sightseeing/driving tours (85.7%); going to the beach (68.2 %); visiting historical or cultural attractions (66.2%); and shopping for crafts or souvenirs (63.6%).
- Visitors to Anne attractions generally tended to take part in almost all travel activities at participation ratios above the norm. Exceptions included attending festivals, playing golf, attending sporting events, participating in sports or outdoor activities, visiting friends and/or relatives, and going to a bar/pub/lounge/night club. Visitors to Anne attractions participated in these activities at below average rates.
- Less than one half of visitors to Anne attractions (43.5 percent) attended a performance (live theatre, a play, or concert). This is surprising given the two Anne-based plays that are performed in Charlottetown (Anne of Green Gables) and Summerside (Anne and Gilbert), the two population centres on PEI. However, the percentage of Anne visitors who did attend a performance was almost double the percentage of non-Anne visitors.

Table 3.13 Travel Activities participated in PEI *

Travel Activity	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total	
	52,973	23.7%	170,405	76.3%	223,378	100.0%
Visiting friends and/or relatives	10,438	19.7%	80,541	47.6%	90,979	40.9%
Sightseeing/Driving tour	45,392	85.7%	111,606	66.0%	156,998	70.7%
Visiting historical and cultural attractions	35,053	66.2%	40,596	24.0%	75,649	34.0%
Visiting Canada's birthplace attractions/Founders' Hall	14,623	27.6%	12,720	7.5%	27,343	12.3%
Visiting a national or provincial park	27,505	51.9%	56,132	33.2%	83,637	37.6%
Visiting a theme, fun or amusement park	10,797	20.4%	27,754	16.4%	38,551	17.4%
Attending a festival, fair or event	7,345	13.9%	32,122	19.0%	39,467	17.8%
Attending a performance (live theatre, a play, a concert)	23,037	43.5%	44,700	26.4%	67,737	30.5%
Attending sports events or tournaments (as a spectator)	1,260	2.4%	8,650	5.1%	9,910	4.5%
Going to a beach	36,104	68.2%	90,384	53.4%	126,488	56.9%
Shopping for local craft/souvenir/antique	33,686	63.6%	83,794	49.5%	117,480	52.9%
Going to a lobster dinner (meal)	24,842	46.9%	40,019	23.6%	64,861	29.2%
Going to a bar/pub/lounge/nightclub	8,470	16.0%	27,702	16.4%	36,172	16.3%
Playing golf (not miniature)	5,003	9.4%	26,891	15.9%	31,894	14.4%
Participating in other sports and/or outdoor activities	6,386	12.1%	23,570	13.9%	29,956	13.5%

Note: * Multiple responses

3.14 Travel Expenditure

Highlights:

- On average, visitors to Anne attractions spent a total of \$1,255.81 per travel party per trip. This was 33 percent more than non-Anne visitors and 23 percent more than the total when all travellers are considered. Anne visitors visit PEI for longer periods of time, and spend more while here.
- Visitors to Anne attractions spent an average \$73.15 per person per night. This was 10.2 percent more than the average expenditures of non-Anne visitors (\$66.38 per night).
- Visitors to Anne attractions spent significantly more on accommodations (\$26.53 per person per night versus \$20.85 spent by non visitors) and in restaurants (\$13.86 versus \$12.46).
- Although visitors to Anne attractions tended to take part in many more travel activities than non-Anne visitors, their average expenditures on recreation and entertainment were not significantly higher (\$8.23 versus \$7.78).

Table 3.14 Travel Expenditures Estimated

Travel Expenditures	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total	
	52,973	23.7%	170,405	76.3%	223,378	100.0%
Total Expenditures Estimated	\$66,621,879		\$161,244,191		\$228,883,301	
Total Avg. Spending per Party per Visit	\$1,255.81		\$946.71		\$1,024.65	
Total Number of Visitors	169,514 (25.3%)		501,137 (74.7%)		670,651 (100.0%)	
Categories of Spending ^{a)}						
Total Avg. Spending per Person per Night (pppn)	\$110.56		\$97.79		\$100.80	
Accommodation	\$47.45		\$44.24		\$45.16	
Restaurants	\$23.95		\$24.05		\$24.02	
Food & Beverages at Stores	\$10.11		\$11.36		\$11.06	
Vehicle & Transportation	\$12.50		\$14.15		\$13.76	
Car Rental	\$27.33		\$32.02		\$30.09	
Shopping	\$17.57		\$19.05		\$18.68	
Recreation & Entertainment	\$15.75		\$20.42		\$19.07	
Other Expenditures	\$16.36		\$14.83		\$15.18	
Categories of Spending ^{b)}						
Total Avg. Spending per Person per Night (pppn)	\$73.15		\$66.38		\$68.65	
Accommodation	\$26.53		\$20.85		\$22.55	
Restaurants	\$13.86		\$12.40		\$12.91	
Food & Beverages at Stores	\$5.85		\$6.48		\$6.34	
Vehicle & Transportation	\$6.32		\$6.98		\$6.81	
Car Rental	\$1.35		\$0.74		\$0.94	
Shopping	\$8.49		\$8.21		\$8.33	
Recreation & Entertainment	\$8.23		\$7.78		\$7.93	
Other Expenditures	\$2.51		\$2.93		\$2.83	

Note: ^{a)} indicates average spending per person per night based only on those visitors who reported spending on that category, whereas ^{b)} indicates average spending per person per night based on all visitors. Total expenditures were calculated as follows: Number of parties (223,378) × average spending per trip (\$1,024.65) ≈ \$228,883,301 or total average spending per person per night (\$68.65) × average number of nights stayed (4.97) × number of visitors (670,651) ≈ \$228,883,301.

3.15 Rating of Travel Services, Complaints and Travel Evaluation

Highlights:

- Visitors to Anne attractions rated travel services almost identical to non-visitors. Both groups gave highest ratings and almost identical scores to “variety of things to see and do” (average score 4.3). Both groups gave almost identical low ratings to the price of goods and services.
- Visitors to Anne attractions gave their highest travel evaluation to “intend to recommend” (average score 4.5). This rating was almost identical to the rating given by non-Anne visitors.
- Those who had visited Anne attractions had lower intentions to revisit PEI than those who had not visited an Anne attraction. While the average scores are both high (4.33 versus 4.58), it may imply that those who visit Anne attractions are more likely to see their PEI vacations as a one-time occurrence.
- Visitors to Anne attractions were also more likely to have a complaint to share, with 16.2 percent indicating there were complaints regarding their visit. Compare this to 12.2 percent of non-Anne visitors. It should be noted that the complaint could refer to **any** part of their vacation to PEI. Potentially, it could be related to the fact that those visitors tended to have more active vacations and took in more activities; perhaps there were more opportunities for a negative experience to occur.

Table 3.15 Rating of Travel Services, Complaints, and Travel Evaluation

Rating of Travel Services, Complaint, and Travel Evaluation	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total	
	52,973	23.7%	170,405	76.3%	223,378	100.0%
Rating of Travel Services ^a						
Accommodation	4.21		4.29		4.27	
Restaurant	4.07		4.08		4.08	
Transportation	4.06		4.06		4.06	
Quality of Customer Service	4.23		4.20		4.20	
Prices of Goods & Services	3.53		3.56		3.56	
Variety of things to see and do	4.29		4.32		4.31	
Complaint ^b	8,564 (16.2%)	29.2%	20,813 (12.2%)	70.8%	29,377	100.0%
Travel Evaluation ^c						
Good Value for Money	4.18		4.20		4.19	
Good Way to Spend Time	4.43		4.43		4.43	
Intention to Revisit	4.33		4.58		4.52	
Intention to Recommendation	4.48		4.52		4.51	

Note: ^a Ratings of travel services are based on a 5-point quality measure scale (1 = very poor and 5 = excellent); ^b Number of travel parties and % of complaint; ^c Scores of travel evaluation are based on a 5-point Likert Type scale (1 = strongly disagree and 5 = strongly agree); Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.16 Demographics

3.16.1 Gender

Highlights:

- Almost two thirds (64.9 percent) of the questionnaires completed by visitors to Anne attractions were completed by females. This was slightly higher than the non-Anne visitors.

Table 3.16 Gender

Gender	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Male	17,868 (33.7%)	24.7%	54,332 (31.9%)	75.3%	72,200 (32.3%)
Female	34,387 (64.9%)	23.2%	113,698 (66.7%)	76.8%	148,085 (66.3%)
Not Stated	719 (1.4%)	23.2%	2,375 (1.4%)	76.8%	3,094 (1.4%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.16.2 Marital Status and Children Living in the Household

Highlights:

- In total 80.6 percent of visitors to Anne attractions lived in married or common law households, slightly lower than the non-Anne visitors.
- Households with children had an average 1.8 children per household.

Table 3.17 Marital Status and Children Living in the Household

Marital Status and Children Living in the Household	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	223,378
Marital Status					
Married or Living Common-law	42,695 (80.6%)	23.3%	140,272 (82.3%)	76.7%	182,967 (81.9%)
Single	9,146 (17.3%)	26.2%	25,722 (15.1%)	73.8%	34,868 (15.6%)
Not Stated	1,132 (2.1%)	20.4%	4,411 (2.6%)	79.6%	5,543 (2.5%)
Average Number of Children Living in the Household					
17 years and younger	1.82		1.87		1.86
18 years and older	1.79		1.71		1.73

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.16.3 Age

Highlights:

- Table 3.18 below refers to the age of the person filling in the survey - not the age ranges of those in the travel party. That being said, the differences between those filling out the survey that had visited Anne attractions versus those who had not are not material. The table tends to reflect the ages of visitors discussed in section 3.4.

Table 3.18 Age

Age	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
18 – 24	2,345 (4.4%)	20.1%	9,294 (5.5%)	79.9%	11,639 (5.2%)
25 – 34	8,273 (15.6%)	26.7%	22,769 (13.4%)	73.3%	31,042 (13.9%)
35 – 44	10,950 (20.7%)	21.5%	40,002 (23.5%)	78.5%	50,952 (22.8%)
45 – 54	12,929 (24.4%)	24.3%	40,286 (23.6%)	75.7%	53,215 (23.8%)
55 – 64	11,445 (21.6%)	26.3%	32,023 (18.8%)	73.7%	43,468 (19.5%)
65 – 74	5,258 (9.9%)	22.2%	18,426 (10.8%)	77.8%	23,684 (10.6%)
75 and over	1,126 (2.1%)	20.8%	4,287 (2.5%)	79.2%	5,413 (2.4%)
Not Stated	647 (1.2%)	16.3%	3,319 (1.9%)	83.7%	3,966 (1.8%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.16.4 Education Level

Highlights:

- More than one half (51.6 percent) of visitors to Anne attractions that completed the survey for their travel party had a university undergraduate degree or higher level of education. This compares to 44.9 percent for the non-Anne visitors.
- Visitation ratios were higher at higher education levels. They were highest for visitors who had completed their undergraduate degrees (26.7 percent visited Anne attractions). However, this doesn't necessarily reflect the education level of the entire travel party, just the person who filled in the survey.
- Visitation ratios were considerably lower for education levels at "some post secondary" or below.
- Anne attractions appeal to those with higher education levels than the average visitor. This suggests that the "Anne" theme may broaden the population of travellers who visit PEI.

Table 3.19 Education Level

Education Level	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Less than high school	607 (1.1%)	14.9%	3,465 (2.0%)	85.1%	4,072 (1.8%)
High school diploma	4,632 (8.7%)	18.7%	20,200 (11.9%)	81.3%	24,832 (11.1%)
Some post-secondary	4,934 (9.3%)	18.4%	21,948 (12.9%)	81.6%	26,882 (12.0%)
Graduated community/ technical college	14,162 (26.7%)	25.0%	42,475 (24.9%)	75.0%	56,637 (25.4%)
Graduated university (undergraduate)	16,363 (30.9%)	26.7%	44,885 (26.3%)	73.3%	61,248 (27.4%)
Post graduate degree/ Professional designation	10,968 (20.7%)	25.7%	31,735 (18.6%)	74.3%	42,703 (19.1%)
Not Stated	1,307 (2.5%)	18.7%	5,692 (3.3%)	81.3%	6,999 (3.1%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.16.5 Employment Status

Highlights:

- A majority of visitors who completed the survey and visited Anne attractions were working full time (30,500 parties or 57.5 percent of total). This was 2.3 percent higher than for the non-Anne visitors.
- At 23.4 percent of total, retired travellers were the second highest group to visit Anne attractions. This was similar to the non-Anne visitors.
- About 25 percent of those working full-time, part-time or seasonally, visited Anne attractions while on PEI.

Table 3.20 Employment Status

Employment Status	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Working full time	30,471 (57.5%)	24.5%	94,040 (55.2%)	75.5%	124,511 (55.7%)
Working part time or seasonally	5,623 (10.6%)	25.8%	16,136 (9.5%)	74.2%	21,759 (9.7%)
Unemployed	418 (0.8%)	17.8%	1,936 (1.1%)	82.2%	2,354 (1.1%)
Retraining or upgrading	40 (0.1%)	7.8%	473 (0.3%)	92.2%	513 (0.2%)
Retired	12,371 (23.4%)	23.6%	40,048 (23.5%)	76.4%	52,419 (23.5%)
Homemaker	2,235 (4.2%)	19.7%	9,085 (5.3%)	80.3%	11,320 (5.1%)
Student	841 (1.6%)	20.3%	3,310 (1.9%)	79.7%	4,151 (1.9%)
Other	366 (0.7%)	15.0%	2,080 (1.2%)	85.0%	2,446 (1.1%)
Not Stated	609 (1.1%)	15.6%	3,298 (1.9%)	84.4%	3,907 (1.7%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

3.16.6 Annual Household Income

Highlights:

- Visitation ratios ranged from a low of 18.8 percent for households with annual incomes of \$60,000 - \$79,999 to a high of 38.7 percent for households with annual incomes of \$150,000 - \$174,999.
- Although visitation rates tended to be higher for higher income households, more than 20 percent of total visitation to Anne attractions was from household with annual incomes of less than \$60,000.
- Visitors with incomes of \$100,000 or more accounted for 37.2 percent of the Anne visitors.

Table 3.21 Annual Household Income

Annual Household Income	Travel Parties who visited Anne of Green Gables Attractions		Travel Parties who did not visit Anne of Green Gables Attractions		Total
	52,973	23.7%	170,405	76.3%	
Under \$20,000	867 (1.6%)	21.7%	3,131 (1.8%)	78.3%	3,998 (1.8%)
\$20,000 to \$39,999	4,203 (8.0%)	22.0%	14,880 (8.7%)	78.0%	19,083 (8.6%)
\$40,000 to \$59,999	5,747 (10.9%)	19.7%	23,439 (13.8%)	80.3%	29,186 (13.1%)
\$60,000 to \$79,999	6,989 (13.2%)	18.8%	30,182 (17.7%)	81.2%	37,171 (16.7%)
\$80,000 to \$99,999	7,363 (14.0%)	28.3%	18,611 (10.9%)	71.7%	25,974 (11.6%)
\$100,000 to \$124,999	6,380 (12.1%)	21.1%	23,800 (14.0%)	78.9%	30,180 (13.5%)
\$125,000 to \$149,999	4,960 (9.4%)	30.9%	11,088 (6.5%)	69.1%	16,048 (7.2%)
\$150,000 to \$174,999	3,425 (6.5%)	38.7%	5,433 (3.2%)	61.3%	8,858 (4.0%)
\$175,000 to \$199,999	1,696 (3.2%)	33.4%	3,376 (2.0%)	66.6%	5,072 (2.3%)
\$200,000 to \$224,999	1,087 (2.1%)	23.0%	3,640 (2.1%)	77.0%	4,727 (2.1%)
\$225,000 to \$249,999	681 (1.3%)	38.2%	1,104 (0.6%)	61.8%	1,785 (0.8%)
\$250,000 or more	1,364 (2.6%)	24.2%	4,268 (2.5%)	75.8%	5,632 (2.5%)
Not Stated	8,009 (15.2%)	22.7%	27,282 (16.0%)	77.3%	35,291 (15.8%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4. A PROFILE OF FIRST-TIME TRAVELLERS WHO WERE ATTRACTED TO PEI BY THE WORLD OF ANNE OF GREEN GABLES AND LUCY MAUD MONTGOMERY

4.1 Volume of the First-Time Travellers

Highlights:

- Of the 61,300 overnight pleasure travel parties who visited PEI for the first time during the study period in 2007, approximately 10.7 percent or 6,500 were attracted to PEI by the world of Anne of Green Gables and the author, Lucy Maud Montgomery.
- Average number of people in each party was 3.43.
- The total volume of first-time visitors attracted to PEI because of the world of Anne of Green Gables was therefore equivalent to approximately 22,400 visitors. This represented 12.1 percent of total overnight first-time pleasure travellers during the period from June 27 to September 30, 2007.

Table 4.1 Volume of First-Time Travellers who were attracted to PEI by the World of Anne of Green Gables and Lucy Maud Montgomery

	Number of Travel Parties estimated	% of Parties	Number of Travellers estimated	% of Travellers
Overnight Pleasure	223,378		670,651	
First-Time Travellers	61,303	100.0%	185,748	100.0%
Travellers who were attracted to PEI by the World of Anne of Green Gables and Lucy Maud Montgomery	6,531	10.7%	22,401	12.1%
Travellers who were attracted to PEI by Other Features	54,772	89.3%	163,347	87.9%

Note: Estimation was for the Period from June 27 to September 30, 2007.

4.2 Primary Reasons for the Trip

Highlights:

- The vast majority (99.6 percent) of first-time visitors who visited because of Anne of Green Gables were on pleasure trips. Only 0.5 percent were on VFR trips. This result sharply contrasts with the overall result for all travel parties that showed that almost 20% of visitors travelled to PEI to visit friends or relatives.

Table 4.2 Primary Reasons for the Trip for First-Time Visitors

Primary Reason for the Trip	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531 (99.6%)	10.7%	54,772 (89.3%)	89.3%	
Pleasure	6,507 (99.6%)	11.7%	48,935 (89.3%)	88.3%	55,442 (90.4%)
VFR	25 (0.4%)	0.5%	5,257 (9.6%)	99.5%	5,282 (8.6%)
Other	0 (0.0%)	0.0%	579 (1.1%)	100.0%	579 (0.9%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.3 Geographical Tourism Markets

Highlights:

- Approximately one half of first-time visitors who were attracted primarily by Anne of Green Gables (49.8 percent) were from other Canadian provinces.
- International markets ranked ahead of the US as the second leading source (International: 29.0 percent; USA: 21.2 percent).
- Ontario was the largest individual market source for first-time “Anne” visitors (17.9 percent); followed by Quebec (12.8 percent) and Nova Scotia (12.2 percent).
- Europe ranked fourth as a source market (11.7 percent) and Japan alone ranked fifth (11.0 percent)
- Although individual market area volumes were low for the US, the ratio of visitors attracted primarily by Anne of Green Gables was higher for the US than it was for Canada (10.8 percent of US visitors attracted primarily by Anne versus 8.1 percent of Canadian visitors).
- Japan was in a tier of its own with 74.7 percent of first-time Japanese visitors attracted primarily by Anne.

Table 4.3 Geographical Tourism Markets of First-Time Visitors

Geographical Tourism Markets	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Canada	3,254 (49.8%)	8.1%	36,701 (67.0%)	91.9%	39,955 (65.2%)
Newfoundland & Lab.	0 (0.0%)	0.0%	722 (1.3%)	100.0%	722 (1.2%)
New Brunswick	133 (2.0%)	6.0%	2,072 (3.8%)	94.0%	2,205 (3.6%)
Nova Scotia	796 (12.2%)	13.9%	4,913 (9.0%)	86.1%	5,709 (9.3%)
Quebec	839 (12.8%)	6.3%	12,394 (22.6%)	93.7%	13,233 (21.6%)
Ontario	1,168 (17.9%)	8.0%	13,349 (24.4%)	92.0%	14,517 (23.7%)
Alberta	176 (2.7%)	11.0%	1,424 (2.6%)	89.0%	1,600 (2.6%)
British Columbia	124 (1.9%)	7.9%	1,449 (2.6%)	92.1%	1,573 (2.6%)
Rest of Canada	18 (0.3%)	4.5%	378 (0.7%)	95.5%	396 (0.6%)
United States	1,382 (21.2%)	10.8%	11,407 (20.8%)	89.2%	12,789 (20.9%)
New England	495 (7.6%)	10.5%	4,221 (7.7%)	89.5%	4,716 (7.7%)
Middle Atlantic	180 (2.8%)	11.5%	1,388 (2.5%)	88.5%	1,568 (2.6%)
South Atlantic	194 (3.0%)	11.2%	1,535 (2.8%)	88.8%	1,729 (2.8%)
North & South Central	396 (6.1%)	12.5%	2,766 (5.1%)	87.5%	3,162 (5.2%)
Rest of US	117 (1.8%)	7.2%	1,497 (2.7%)	92.8%	1,614 (2.6%)
International	1,896 (29.0%)	22.1%	6,664 (12.2%)	77.9%	8,560 (14.0%)
Europe	767 (11.7%)	14.9%	4,368 (8.0%)	85.1%	5,135 (8.4%)
Japan	718 (11.0%)	74.7%	243 (0.4%)	25.3%	961 (1.6%)
Other Countries	411 (6.3%)	16.7%	2,053 (3.7%)	83.3%	2,464 (4.0%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.4 Gender and Age of Travellers

Highlights:

- Females were attracted to PEI because of Anne of Green Gables by a ratio of almost 60:40 over males (57.3 percent of visitors female; 42.2 percent males).
- The largest number of first-time visitors attracted by Anne (18.2 percent or 4,100 visitors) were in the age bracket 55 to 64.
- Although the largest number of visitors (8,100 visitors or 36.0 percent) were 55 plus, 25 percent were under the age of 25.

Table 4.4 Gender and Age of First-Time Visitors

Gender and Age of Travellers	Travellers who were attracted to PEI by Anne of Green Gables		Travellers who were attracted to PEI by Other Features		Total
	22,401	12.1%	163,347	87.9%	
Gender					
Male	9,454 (42.2%)	11.2%	74,966 (45.9%)	88.8%	84,420 (45.4%)
Female	12,843 (57.3%)	13.0%	86,109 (52.7%)	87.0%	98,952 (53.3%)
Not Stated	104 (0.5%)	4.4%	2,272 (1.4%)	95.6%	2,376 (1.3%)
Age					
0 – 8	1,777 (7.9%)	13.4%	11,513 (7.0%)	86.6%	13,290 (7.2%)
9 – 17	2,742 (12.2%)	13.3%	17,846 (10.9%)	86.7%	20,588 (11.1%)
18 – 24	1,268 (5.7%)	11.6%	9,671 (5.9%)	88.4%	10,939 (5.9%)
25 – 34	2,639 (11.8%)	13.9%	16,409 (10.0%)	86.1%	19,048 (10.3%)
35 – 44	3,120 (13.9%)	10.2%	27,352 (16.7%)	89.8%	30,472 (16.4%)
45 – 54	2,688 (12.0%)	8.7%	28,138 (17.2%)	91.3%	30,826 (16.6%)
55 – 64	4,072 (18.2%)	12.2%	29,173 (17.9%)	87.8%	33,245 (17.9%)
65 – 74	3,535 (15.8%)	15.9%	18,700 (11.4%)	84.1%	22,235 (12.0%)
74 and over	461 (2.1%)	16.8%	2,278 (1.4%)	83.2%	2,739 (1.5%)
Not Stated	99 (0.4%)	4.2%	2,267 (1.4%)	95.8%	2,366 (1.3%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.5 Composition of Travelling Party and Average Party Size

Highlights:

- The ratio of first-time visitors attracted primarily by Anne of Green Gables was skewed decidedly toward family travellers (with children); however, the number of adult travellers is much larger so they account for more actual visitors.
- Anne of Green Gables was the main reason for 8.5 percent of first-time adult couples visiting the Island and it was the main reason for 14.2 percent of first-time typical family visitors (two adults with children).
- Because of the disproportionate number of family travellers the average party size for first-time visitors attracted by Anne was an above average 3.43 people per party.

Table 4.5 Composition of Travelling Party and Average Party Size of First-time Visitors

Party Composition and Party Size	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Party Composition					
Travelling alone	76 (1.2%)	3.5%	2,111 (3.9%)	96.5%	2,187 (3.6%)
2 adults	2,806 (43.0%)	8.5%	30,212 (55.2%)	91.5%	33,018 (53.9%)
3 or more adults	1,056 (16.2%)	14.2%	6,368 (11.6%)	85.8%	7,424 (12.1%)
Alone with child(ren)	159 (2.4%)	31.3%	349 (0.6%)	68.7%	508 (0.8%)
2 adults with child(ren)	1,882 (28.8%)	14.1%	11,479 (21.0%)	85.9%	13,361 (21.8%)
3 or more adults with child(ren)	552 (8.5%)	12.1%	3,994 (7.3%)	87.9%	4,546 (7.4%)
Child(ren) travelling alone	0 (0.0%)	0.0%	67 (0.1%)	100.0%	67 (0.1%)
Not Stated	0 (0.0%)	0.0%	191 (0.3%)	100.0%	191 (0.3%)
Party Size					
Average Party Size	3.43		2.99		3.03
Avg. Number of Adult Travellers	2.72		2.75		2.75
Avg. Number of Male Adults	1.45		1.71		1.68
Avg. Number of Female Adults	1.97		1.92		1.92
Avg. Number of Children	0.69		0.88		0.86

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row; Family travel represents 30% of the total first-time pleasure travel parties, including alone with children, 2 adults with children, and 3 or more adults with children in composition of travelling party.

4.6 Primary Destination of the Trip and Trip Duration

Highlights:

- Prince Edward Island was the primary destination for 58.6 percent of the first-time visitors attracted to the Island primarily by Anne of Green Gables.
- First-time visitors attracted primarily by Anne were on trips of above average length (11.6 nights). They spent a below average 3.5 nights (30.5 percent) of their total trip nights on PEI. This contrasts sharply with the overall results for all travellers who spent 62.2 percent of their travel nights on PEI.

Table 4.6 Primary Destination of the Trip and Trip Duration for First-Time Visitors

Primary Destination and Trip Duration	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Primary Destination					
Prince Edward Island	3,824 (58.6%)	9.8%	35,163 (64.2%)	90.2%	38,987 (63.6%)
Other Destinations	2,438 (37.3%)	11.5%	18,686 (34.1%)	88.5%	21,124 (34.5%)
Don't know	149 (2.3%)	21.6%	540 (1.0%)	78.4%	689 (1.1%)
Not Stated	120 (1.8%)	23.9%	383 (0.7%)	76.1%	503 (0.8%)
Average Trip Duration (For those who visited the stated destination)					
Total Nights of the Trip		11.58		10.36	10.49
Nights stayed in PEI		3.53		4.33	4.25
Nights stayed in NB		2.51		2.70	2.68
Nights stayed in NS		5.55		5.43	5.45
Nights stayed in NL		9.17		6.63	7.18
Nights stayed in Magdalen Isl.		n/a		6.50	6.50

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.7 Overnight Destinations in PEI

Highlights:

- A well above average ratio of first-time visitors attracted primarily by Anne stayed overnight in Charlottetown (38.2 percent versus 31.8 percent of first-time visitors who were not attracted by Anne).
- In terms of actual number of visitors, almost 3,000 first-time, “Anne” visitor parties stayed overnight in Charlottetown. Anne’s Land ranked second (2,600) and Points East a distant third (1,000 parties stayed overnight). These first-time Anne visitors primarily stay in the central region of PEI.

Table 4.7 Overnight Destinations (Tourism Regions) in PEI for First-Time Visitors*

Overnight Destinations in PEI	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Charlottetown	2,977 (38.2%)	11.8%	22,200 (31.8%)	88.2%	25,177 (32.4%)
Summerside	632 (8.1%)	8.5%	6,781 (9.7%)	91.5%	7,413 (9.5%)
North Cape Costal	223 (2.9%)	3.6%	5,995 (8.6%)	96.4%	6,218 (8.0%)
Anne's Land	2,643 (33.9%)	11.6%	20,225 (29.0%)	88.4%	22,868 (29.5%)
Charlotte's Shore	308 (3.9%)	6.0%	4,829 (6.9%)	94.0%	5,137 (6.6%)
Points East Costal	1,016 (12.0%)	9.4%	9,807 (14.0%)	90.6%	10,823 (13.9%)
Total Overnight Stays	7,799	10.0%	69,837	90.0%	77,636

Note: * Multiple responses; Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.8 Type of Accommodations

Highlights:

- First-time visitors attracted by Anne of Green Gables were three times as likely to stay in inns (17.0 percent versus 4.7 percent) and one third as likely to stay with friends or relatives (2.7 percent versus 9.7 percent) as first-time parties who were attracted to PEI for other reasons.
- In general, first-time visitors are much more likely to stay in hotels, motels, and resorts and inns than the repeat visitors. A surprising high number of first-time visitors stay in camp or trailer parks. At 23 percent overall, this is much higher than for repeat visitors.

Table 4.8 Type of Accommodations used in PEI by First-Time Visitors *

Type of Accommodations	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total	
	6,531	10.7%	54,772	89.3%	61,303	100.0%
Hotel/Motel/Resort	2,548 (32.1%)	10.3% (2.14)	22,148 (31.4%)	89.7% (2.69)	24,696 (31.5%)	(2.61)
Inn	1,346 (17.0%)	28.7% (3.19)	3,349 (4.7%)	71.3% (2.91)	4,695 (6.0%)	(3.00)
Cottage/Cabin	983 (12.4%)	8.3% (4.21)	10,901 (15.5%)	91.7% (5.32)	11,884 (15.1%)	(5.23)
Bed & Breakfast/Tourist Home	957 (12.1%)	9.6% (3.46)	8,979 (12.7%)	90.4% (3.30)	9,936 (12.7%)	(3.32)
Camping/Trailer Park	1,666 (21.0%)	9.2% (3.83)	16,391 (23.2%)	90.8% (4.57)	18,057 (23.0%)	(4.49)
Home of Friends or Relatives	213 (2.7%)	2.8% (3.92)	7,376 (10.5%)	97.2% (5.71)	7,589 (9.7%)	(5.66)
Other (e.g., Hostel)	217 (2.7%)	13.4% (1.69)	1,406 (2.0%)	86.6% (2.63)	1,623 (2.1%)	(2.48)
Total Stays	7,930	10.1%	70,550	89.9%	78,480	100.0%

Note: * Multiple responses; Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row; Numbers in parentheses indicate average number of nights stayed in each type of accommodations.

4.9 Rental Car Usage and Location

Highlights:

- First-time visitors attracted primarily because of Anne were much more likely to be travelling in rental cars than other visitors (29.0 percent versus 20.3 percent).
- A very high percent of the first-time visitors who were attracted to PEI because of Anne rented their cars in the US. This is consistent with the results presented in Table 4.6 showing that for the first-time Anne visitors, fewer of the total trip nights were spent in PEI.
- Based on the results in Table 4.3, it appears that many Japanese visitors rent cars in the US, and then drive to PEI. This would account for the results below. In addition, the results for PEI suggest that many Japanese visitors also rent cars on PEI.

Table 4.9 Rental Car Usage and Location by First-Time Visitors

Rental Car Usage and Location	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	61,303
Rental Car Usage					
Yes	1,894 (29.0%)	9.6%	11,110 (20.3%)	90.4%	13,004 (21.2%)
No	4,637 (71.0%)	14.6%	43,661 (79.7%)	85.4%	48,298 (78.8%)
Location Car was Rented					
Prince Edward Island	571 (30.1%)	15.0%	3,233 (29.1%)	85.0%	3,804 (29.3%)
Nova Scotia	364 (19.2%)	7.6%	4,420 (39.8%)	92.4%	4,784 (36.8%)
New Brunswick	89 (4.7%)	9.3%	865 (7.8%)	90.7%	954 (7.3%)
Other Provinces	367 (19.4%)	18.0%	1,670 (15.0%)	82.0%	2,037 (15.7%)
United States	504 (26.6%)	35.3%	922 (8.3%)	64.7%	1,426 (11.0%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.10 Travel Activity

Highlights:

- Not surprisingly, almost all (97.4 percent) of the first-time visitors who were attracted to PEI because of Anne of Green Gables visited Anne of Green Gables attractions while visiting the Island.
- Other leading travel activities by first-time visitors attracted primarily by Anne included: sightseeing/driving tours (81.1%); Visiting historical & cultural attractions (63.7%); going to the beach (58.2%) and shopping for local crafts and souvenirs (52.7%).
- In comparison to first-time visitors who were not attracted primarily by Anne of Green Gables, Anne visitors participated at below average rates in visiting friends & relatives and in outdoor, nature and sport related activities (visiting National Parks, going to the beach, golfing, and other outdoor activities).
- Although Anne visitors attended plays or live theatre at well above average rates (49.9 percent attended as compared to 32.9 percent of other first-time visitors), this still left one half of these visitors who did not attend a performance. In addition, it is important to note that 30.5 percent of all visitors to PEI attended plays or live theatre. It might have been expected that the first-time Anne visitors would have been more likely to attend an Anne performance.
- Again, this is surprising given that the very famous Anne of Green Gables musical is performed in Charlottetown where many of these first-time Anne visitors stay overnight.

Table 4.10 Travel Activities Participated in on PEI by First-Time Visitors *

Travel Activity	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total	
	6,531	10.7%	54,772	89.3%	61,303	100.0%
Visiting friends and/or relatives	296	4.5%	11,108	20.4%	11,404	18.7%
Sightseeing/Driving tour	5,295	81.1%	45,989	84.3%	51,284	83.9%
Visiting historical and cultural attractions	4,163	63.7%	28,376	52.0%	32,539	53.3%
Visiting Canada's birthplace attractions/Founders' Hall	1,490	22.8%	11,557	21.2%	13,047	21.4%
Visiting Anne of Green Gables attractions	6,359	97.4%	24,309	44.6%	30,668	50.2%
Visiting a national or provincial park	2,650	40.6%	26,700	48.9%	29,350	48.0%
Visiting a theme, fun or amusement park	636	9.7%	8,512	15.6%	9,148	15.0%
Attending a festival, fair or event	440	6.7%	7,433	13.6%	7,873	12.9%
Attending a performance (live theatre, a play, a concert)	3,256	49.9%	17,943	32.9%	21,199	34.7%
Attending sports events or tournaments (as a spectator)	0	0.0%	680	1.2%	680	1.1%
Going to a beach	3,798	58.2%	36,244	66.4%	40,042	65.5%
Shopping for local craft/souvenir/antique	3,442	52.7%	29,270	53.6%	32,712	53.5%
Going to a lobster dinner (meal)	2,743	42.0%	23,954	43.9%	26,697	43.7%
Going to a bar/pub/lounge/nightclub	868	13.3%	9,575	17.5%	10,443	17.1%
Playing golf (not miniature)	194	3.0%	5,452	10.0%	5,646	9.2%
Participating in other sports and/or outdoor activities	421	6.4%	6,810	12.5%	7,231	11.8%

Note: * Multiple responses

4.11 Travel Expenditure

Highlights:

- On average, first-time Anne visitors spent a total of \$1,064.95 per travel party per trip. This was less other first-time visitors; however Anne visitors visit PEI for shorter periods of time. Thus they spend more per visitor per night while here when only those travellers who reported spending money in a particular category are considered.
- First-time visitors attracted primarily by Anne of Green Gables spent an average of \$87.88 per person per night. This was almost identical to the average expenditures of other first-time visitors (\$87.84 per person per night) when all visitor spending is considered.
- Anne visitors tended to spend more on accommodation (\$36.35 per person per night versus \$32.91 spent by other first-time visitors). They also tended to spend more on recreation and entertainment (\$11.55 versus \$9.87). Their restaurant expenditures were below average (\$15.53 versus \$17.31).
- First-time Anne visitors were above average souvenir shoppers yet not by an exceptionally large amount (\$10.19 as compared to \$9.29 spent by other first-time visitors).

Table 4.11 Travel Expenditures Estimated by First-time Visitors

Travel Expenditures	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total	
	6,531	10.7%	54,772	89.3%	61,303	100.0%
Total Expenditures estimated	\$6,950,188		\$61,852,096		\$68,802,285	
Total Avg. Spending per Party per Visit	\$1,064.95		\$1,130.54		\$1,123.53	
Total Number of Visitors	22,401 (12.1%)		163,347 (87.9%)		185,748 (100.0%)	
Categories of Spending ^{a)}						
Total Avg. Spending per Person per Night (pppn)	\$118.90		\$113.99		\$114.52	
Accommodation	\$48.92		\$52.19		\$51.79	
Restaurants	\$23.58		\$27.20		\$26.80	
Food & Beverages at Stores	\$9.65		\$10.80		\$10.68	
Vehicle & Transportation	\$13.01		\$14.02		\$13.93	
Car Rental	\$26.23		\$31.20		\$30.55	
Shopping	\$22.00		\$17.66		\$18.13	
Recreation & Entertainment	\$19.17		\$17.27		\$17.53	
Other Expenditures	\$13.66		\$14.35		\$14.30	
Categories of Spending ^{b)}						
Total Avg. Spending per Person per Night (pppn)	\$87.88		\$87.44		\$87.25	
Accommodation	\$36.35		\$32.91		\$33.17	
Restaurants	\$15.53		\$17.31		\$17.09	
Food & Beverages at Stores	\$4.30		\$5.84		\$5.67	
Vehicle & Transportation	\$6.47		\$8.15		\$7.96	
Car Rental	\$2.62		\$1.89		\$1.95	
Shopping	\$10.19		\$9.29		\$9.35	
Recreation & Entertainment	\$11.55		\$9.87		\$10.01	
Other Expenditures	\$0.88		\$2.18		\$2.05	

Note: ^{a)} indicates average spending per person per night based only on those visitors who reported spending on that category, whereas ^{b)} indicates average spending per person per night based on all visitors. Total expenditures were calculated as follows: Number of parties (61,303) × average spending per trip (\$1,123.53) ≈ \$68,802,285 or total average spending per person per night (\$87.25) × average number of nights stayed (4.25) × number of visitors (185,748) ≈ \$68,802,285.

4.12 Rating of Travel Services, Complaints and Travel Evaluation

Highlights:

- First-time Anne visitors rated travel services almost identical to other first-time visitors as well as to total visitors.
- Highest ratings (4.24) were given for the variety of things to see and do. Lowest ratings were given for the prices of goods and services (3.50).
- Their intention to revisit showed the greatest deviation from the average. They rated their intentions 3.89. This was 7.1 percent below the average for other first-time visitors (4.19). As was suggested earlier, it seems that Anne visitors view PEI as a one-time destination.

Table 4.12 Rating of Travel Services, Complaints, and Travel Evaluation by First-Time Visitors

Rating of Travel Services, Complaint, and Travel Evaluation	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total	
	6,531	10.7%	54,772	89.3%	61,303	100.0%
Rating of Travel Services^a						
Accommodation	4.18		4.23		4.23	
Restaurant	3.96		4.06		4.05	
Transportation	3.93		4.04		4.03	
Quality of Customer Service	4.15		4.21		4.21	
Prices of Goods & Services	3.50		3.51		3.51	
Variety of things to see and do	4.24		4.27		4.26	
Complaint^b	790 (12.1%)	9.6%	7,475 (13.6%)	90.4%	8,265 (13.5%)	100.0%
Travel Evaluation^c						
Good Value for Money	4.03		4.13		4.12	
Good Way to Spend Time	4.29		4.36		4.35	
Intention to Revisit	3.89		4.19		4.16	
Intention to Recommendation	4.22		4.39		4.37	

Note: ^a Ratings of travel services are based on a 5-point quality measure scale (1 = very poor and 5 = excellent); ^b Number of travel parties and % of complaint; ^c Scores of travel evaluation are based on a 5-point Likert Type scale (1 = strongly disagree and 5 = strongly agree); Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.13 Demographics

4.13.1 Gender

Highlights:

- In total 63.5 percent of the questionnaires completed by Anne visitors were completed by females. This was above the female ratio for other first-time visitors (58.2 percent).

Table 4.13 Gender of First-Time Visitors who Completed the Survey

Gender	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	61,303
Male	2,341 (35.8%)	9.6%	22,162 (40.5%)	90.4%	24,503 (40.0%)
Female	4,148 (63.5%)	11.5%	31,860 (58.2%)	88.5%	36,008 (58.7%)
Not Stated	43 (0.7%)	5.4%	749 (1.4%)	94.6%	792 (1.3%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.13.2 Marital Status and Children Living in the Household

Highlights:

- More than three quarters (77.2 percent) of first-time, Anne visitors lived in married or common law households.
- An above average 22.0 percent were not married.
- Families with children in the household tended to be slightly smaller than the norm.

Table 4.14 Marital Status and Children Living in the Household of First-Time Visitors

Marital Status and Children Living in the Household	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	Count	Percentage	Count	Percentage	
	6,531	10.7%	54,772	89.3%	61,303
Marital Status					
Married or Living Common-law	5,041 (77.2%)	10.2%	44,195 (80.7%)	89.8%	49,236 (80.3%)
Not Married or Living Common-law	1,437 (22.0%)	13.5%	9,187 (16.8%)	86.5%	10,624 (17.3%)
Not Stated	53 (0.8%)	3.7%	1,389 (2.5%)	96.3%	1,442 (2.4%)
Average Number of Children Living in the Household					
17 years and younger	1.72		1.80		1.79
18 years and older	1.55		1.68		1.67

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.13.3 Age

Highlights:

- The largest number of first-time visitors who completed the exit survey and who were attracted to PEI primarily because of Anne of Green Gables were between the ages of 35 and 44 (23.6 percent) and 55 to 64 (23.7 percent). Together they accounted for almost one half (47.3 percent) of first-time visitors attracted mainly by Anne.
- While these age groups accounted for the largest numbers of visitors, the ratios of visitors attracted primarily because of Anne were highest for the 25 to 34 group (15.1 percent of first-time visitors visited because of Anne) and the youngest (18-24) age group (13.4 percent visited because of Anne).

Table 4.15 Age of First-Time Visitors Filling in the Survey

Age	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531 (6.5%)	10.7%	54,772 (5.1%)	89.3%	
18 – 24	426 (6.5%)	13.3%	2,775 (5.1%)	86.7%	3,201 (5.2%)
25 – 34	1,278 (19.6%)	15.1%	7,192 (13.1%)	84.9%	8,470 (13.8%)
35 – 44	1,538 (23.6%)	10.9%	12,571 (23.0%)	89.1%	14,109 (23.0%)
45 – 54	968 (14.8%)	6.8%	13,274 (24.2%)	93.2%	14,242 (23.2%)
55 – 64	1,546 (23.7%)	10.8%	12,707 (23.2%)	89.2%	14,253 (23.3%)
65 – 74	692 (10.6%)	11.8%	5,162 (9.4%)	88.2%	5,854 (9.5%)
75 and over	28 (0.4%)	4.9%	547 (1.0%)	95.1%	575 (0.9%)
Not Stated	53 (0.8%)	8.9%	544 (1.0%)	91.1%	597 (1.0%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.13.4 Education Level

Highlights:

- On the basis of education, survey respondents who were first-time visitors attracted because of Anne who had graduated from university made up the largest segment. They accounted for 41.4 percent of total first-time visitors attracted mainly by Anne. A well above average 14.0 percent of first-time visitors with this level of education identified Anne as the main motivator to visit the Island.
- This ratio fell by more than one half to 6.8 percent at the next (higher) level of education (post graduate).

Table 4.16 Education Level of First-Time Visitors Filling in the Survey

Education Level	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Less than high school	107 (1.6%)	21.7%	385 (0.7%)	78.3%	492 (0.8%)
High school diploma	329 (5.0%)	7.7%	3,930 (7.2%)	92.3%	4,259 (6.9%)
Some post-secondary	541 (8.3%)	10.7%	4,523 (8.3%)	89.3%	5,064 (8.3%)
Graduated community/ technical college	1,785 (27.3%)	10.5%	15,286 (27.9%)	89.5%	17,071 (27.8%)
Graduated university (undergraduate)	2,705 (41.4)	14.0%	16,562 (30.2%)	86.0%	19,267 (31.4%)
Post graduate degree/ Professional designation	895 (13.7%)	6.8%	12,298 (22.5%)	93.2%	13,193 (21.5%)
Not Stated	169 (2.6%)	8.6%	1,787 (3.3%)	91.4%	1,956 (3.2%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.13.5 Employment Status

Highlights:

- Students making their first visit to the Island were attracted primarily because of Anne at twice the average ratio (22.9 percent).
- Those working full time accounted for 56.5 percent of total first-time visitors attracted by Anne. However, they also make up a total of 59.1 percent of all first-time visitors, so the 56.5 percent is not unexpected. In comparison, those working part time or seasonally make up 7.1 percent of first-time visitors filling in the survey, but this rises to 13.5 percent for first-time visitors filling in the survey who were attracted by Anne.

Table 4.17 Employment Status of First-Time Visitors Filling in the Survey

Employment Status	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Working full time	3,692 (56.5%)	10.2%	32,567 (59.5%)	89.8%	36,259 (59.1%)
Working part time or seasonally	883 (13.5%)	20.4%	3,441 (6.3%)	79.6%	4,324 (7.1%)
Unemployed	0 (0.0%)	0.0%	374 (0.7%)	100.0%	374 (0.6%)
Retraining or upgrading	7 (0.1%)	8.1%	79 (0.1%)	91.9%	86 (0.1%)
Retired	1,338 (20.5%)	8.6%	14,143 (25.8%)	91.4%	15,481 (25.3%)
Homemaker	274 (4.2%)	12.1%	1,989 (3.6%)	87.9%	2,263 (3.7%)
Student	258 (4.0%)	22.9%	867 (1.6%)	77.1%	1,125 (1.8%)
Other	14 (0.2%)	2.8%	480 (0.9%)	97.2%	494 (0.8%)
Not Stated	64 (1.0%)	7.2%	831 (1.5%)	92.8%	895 (1.5%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

4.13.6 Annual Household Income

Highlights:

- The largest group of first-time Anne visitors (22.4 percent) had annual household incomes in the range \$60,000 to \$79,999.
- Almost 36 percent of first-time visitors attracted to PEI because of Anne recorded income levels of \$100,000 or more.
- Overall, income level and the incidence of first-time visitors attracted to PEI by Anne were not highly related.

Table 4.18 Annual Household Income of First-Time Visitors

Annual Household Income	Travel Parties who were attracted to PEI by Anne of Green Gables		Travel Parties who were attracted to PEI by Other Features		Total
	6,531	10.7%	54,772	89.3%	
Under \$20,000	157 (2.4%)	15.6%	852 (1.6%)	84.4%	1,009 (1.6%)
\$20,000 to \$39,999	543 (8.3%)	11.4%	4,238 (7.7%)	88.6%	4,781 (7.8%)
\$40,000 to \$59,999	479 (7.4%)	8.8%	4,969 (9.1%)	91.2%	5,448 (8.9%)
\$60,000 to \$79,999	1,392 (21.4%)	17.4%	6,591 (12.0%)	82.6%	7,983 (13.0%)
\$80,000 to \$99,999	488 (7.5%)	6.8%	6,730 (12.3%)	93.2%	7,218 (11.8%)
\$100,000 to \$124,999	412 (6.3%)	4.4%	8,867 (16.2%)	95.6%	9,279 (15.1%)
\$125,000 to \$149,999	883 (13.6%)	15.2%	4,913 (9.0%)	84.8%	5,796 (9.5%)
\$150,000 to \$174,999	253 (3.9%)	6.3%	3,738 (6.8%)	93.7%	3,991 (6.5%)
\$175,000 to \$199,999	71 (1.1%)	3.3%	2,105 (3.8%)	96.7%	2,176 (3.6%)
\$200,000 to \$224,999	352 (5.4%)	13.7%	2,221 (4.1%)	86.3%	2,573 (4.2%)
\$225,000 to \$249,999	137 (2.1%)	21.5%	500 (0.9%)	78.5%	637 (1.0%)
\$250,000 or more	220 (3.4%)	17.7%	1,024 (1.9%)	82.3%	1,244 (2.0%)
Not Stated	1,129 (17.3%)	12.4%	8,003 (14.6%)	87.6%	9,132 (14.9%)

Note: Percentages in parentheses indicate % within column (segment), whereas other percentages indicate % within row.

5. SUMMARY AND IMPLICATIONS

5.1 Visitors to Anne of Green Gables Attractions

- A total of 53,000 visitor parties, (169,000 people) visited Anne of Green Gables attractions during the study period in 2007. This was equivalent to a quarter (25.3 percent) of total pleasure visitors.
- Visitors to Anne attractions originated from all market areas. Canadian markets were the leading source of visitors (74 percent). The US ranked second (16 percent), and International markets supplied the remaining 10 percent.
- The ratios of visitation by origin were the reverse of volumes. Fuelled by Japanese visitors (75 percent visited Anne attractions), almost one half (49 percent) of International visitors visited Anne attractions. US visitors ranked second (39 percent visited) and Canadian visitors ranked a distant third (approximately 21 percent visited Anne attractions).
- Visitors to Anne attractions tended to be on longer trips (10.5 nights away from home as compared to 7.2 nights for non-Anne visitors). They stayed longer on the Island (5.4 nights vs. 4.9 nights for the non-Anne visitors) and they spent approximately 10 percent more per person per night (\$73.15)
- The leading reason visitors to Anne attractions travelled to PEI was the natural beauty and pastoral setting of the Island (39 percent). The world of Anne of Green Gables ranked second (21 percent).
- While visiting PEI, Anne visitors were much more likely to stay in paid accommodations (hotels, motels, resorts and especially B&B's and tourist homes) than were the average visitors to PEI (91.1% versus 78.1%). They were much less likely to stay with friends & relatives.
- Visitors who stayed in cottages or in campgrounds/trailer parks tended to visit Anne attractions at much lower rates than visitors staying in other types of commercial accommodation.
- Visitors to Anne attractions tended to participate in a wider variety of travel activities and at higher rates than non-visitors to Anne attractions. Exceptions were outdoor and sport related activities (including golf) where participation rates were lower.
- Well under one half of visitors to Anne attractions (43 percent) attended plays, performances or live theatre. This is surprising given that the very famous Anne of Green Gables musical is performed in Charlottetown where many of the Anne visitors stay overnight.
- Anne attractions drew a modestly above average ratio of family travellers (families accounted for 26.4 percent of visitors to Anne attractions and 23.5 percent of non visitors). A leading 31.2 percent of total visitors to Anne attractions were in the age range 35-54. Only slightly less (30.8 percent) were 55 plus. Children under 18 years of age accounted for 20 percent of total visitors to Anne attractions.
- While Anne attractions had fairly universal appeal to Island visitors, there were some notable weaknesses. Visitation was weak for return visitors. First-time visitors visited Anne attractions at more than three times the rate of returning visitors (50.0 percent of first-time visitors visited attractions as compared to only 13.7 percent of returning visitors).

- Other significant weaknesses in visitation to Anne attractions were found among visitors in the age range 18-34; among visitors with low levels of education; among VFR visitors and among visitors from Nova Scotia and especially New Brunswick.

5.2 First-time Visitors

- A total of 61,300 travel parties visited Prince Edward Island for the first time during the study period in 2007. Approximately 6,500 of these first-time visitor parties (10.7 percent) indicated the main reason they were attracted to the Island was because of Anne of Green Gables and the World of Lucy Maud Montgomery.
- The average party size was 3.43 people per party. This resulted in a total of 22,400 first-time visitors attracted mainly because of Anne (12.1 percent of total first-time visitors).
- First-time visitors attracted mainly because of Anne tended to run very close to the profile for all first-time visitors and to the profiles of total visitors to Anne attractions in some respects. In others there were notable differences.
- The largest numbers of visitors attracted primarily by Anne were from the other Canadian provinces (49.8 percent). International markets moved up from third to rank second (29.0 percent) and the US dropped to third (21.2 percent).
- The ratios of visitation (percent of first-time visitors attracted primarily by Anne versus those attracted by other features) followed the same rank order as visitation to Anne attractions. International ranked first (22.1 percent); the US second (10.8 percent) and Canada third (8.1 percent).
- First-time visitors attracted primarily by Anne were more likely to be female by a ratio of almost 60:40. An above average 14.1 percent of first-time family visitors were attracted by Anne as compared to only 8.5 percent of adult couple visitors.
- Prince Edward Island was not the main destination for 40 percent of the first-time visitors who visited the Island primarily because of Anne. This may not be surprising given the high incidence of international travellers who were first-time visitors.
- First-time visitors attracted mainly by Anne were on longer trips than other first-time visitors yet they stayed considerably less time on the Island (3.5 versus 4.3 nights). As a result Anne visitors spent only 30.4 percent of their trip nights on the Island as compared to 43.3 percent of nights spent by non-Anne visitors. This also contrasts sharply with average visitors to PEI who spent 62 percent of their time on PEI.
- First-time Anne visitors spent an average of \$87.88 per person per night which was almost identical to the average expenditure of other first-time visitors. Because of their shorter length of stay their total trip expenditures averaged \$1,065 as compared to \$1,131 for non-Anne visitors.
- First-time visitors attracted mainly by Anne tended to take part in many of the popular activities, such as going to the beach, at lower rates than other first-time visitors. Their interest appeared to be more focused on Anne related attractions and activities. Almost one half (49 percent) attended live theatre or plays, which were likely probably related to Anne of Green Gables. While this percentage was much higher than for the other visitors, it might still be considered disappointing for those presenting Anne related theatre.

- First-time visitors attracted mainly by Anne gave the Island good (on average) ratings with the exception of intent to revisit which they rated somewhat below average.

5.3 Implications

1. When viewed in a Maritime context, visitation to Anne of Green Gables attractions is very solid. With 25 percent of all pleasure travellers to the Island visiting Anne attractions in 2007, the capture or visitation rate is much higher than it is for major themed attractions such as Fortress Louisbourg or Kings Landing in neighbouring Nova Scotia and New Brunswick.
2. Anne of Green Gables benefits from very broad market appeal. While some segments perform better than others few segments perform so poorly that they would be considered out of market (no interest in Anne).
3. While visitation to Anne attractions is very solid there still appears to be room to move in terms of maximizing impact. Less than 50 percent of even the first-time visitors attracted mainly by Anne attended plays, performances or live theatre. Unless sell-outs are the norm, this should present an opportunity.
4. While the Anne concept has a number of strengths it also has limitations. The most significant and obvious limitation is a weakness in attracting repeat visitation. Visitation to Anne attractions by return visitors falls to less than one third the rate of first-time visitors (13.7 percent vs. 50.0 percent). For visitors returning within the past three years the visitation rate falls to only 8.7 percent. The message appears to imply that Anne attractions are good attractions but do not have the draw to make visitors return.
5. This message appears to be strongly reinforced by even Anne's most devoted followers. Visitors who were drawn to the Island mainly because of the World of Anne of Green Gables and Lucy Maud Montgomery visited Anne attractions but they did not stay long and they are less likely to return. The message appears to be, "We came to the Island because of Anne...we saw what we wanted to see...why come back?"
6. This combination of factors has two implications: first the regional market (NS &NB) has high repeat visitation to PEI and is essentially burnt-out on Anne (visitation rates to Anne attractions by these visitors are very low). This has implications in that NS and NB are very big markets for the Island and are very approachable from a marketing perspective – an ad campaign can be run for a fraction of what it would cost to run the same campaign in, for example, Ontario or New England. The second implication involves development of new Anne attractions or promotion. As the current Anne product has an extreme burn-out factor, any further development of the Anne theme must rely to a very large extent on what is new in order to draw visitation. What is already there has been experienced by visitors interested in Anne and they don't see a reason to go back.
7. Another problem or limitation facing expansion of the Anne of Green Gables theme is the segments with the highest potential (greatest interest) are often not the most important segments for the Island. While Anne carries a universal interest (to a degree) it is often the smaller segments that have the highest interest in Anne. In some cases these segments are so small the potential to impact total industry performance is limited. Examples include:
 - Ontario accounted for 24 percent of first-time visitors yet only 8 percent were mainly attracted by Anne. Interest was more than 50 percent higher for visitors from

the North and South Central US states (12.5 percent), yet they account for only 5 percent of first-time visitors.

- Adult couples accounted for 54 percent of first-time visitors, yet only 8.5 percent were attracted by Anne. Interest by families was 65 percent higher (14.1 percent) yet they account for only 22 percent of first-time visitors.
- Almost one quarter (23 percent) of students visiting for the first-time were attracted to the Island mainly by Anne yet they account for a very small 2 percent of first-time visitors. Retired persons, on the other hand, account for 25 percent of first-time visitors, yet only 8.6 percent were attracted by Anne.

6. FINAL THOUGHTS

The Exit Survey data shows 25 percent of travellers visited Anne of Green Gables attractions during the 2007 tourism season. This indicates Anne of Green is very much an integral part of the Prince Edward Island tourism product. It also suggests strong appeal as a secondary motivator for travel. The survey also proves the Anne tourism product provides potential as a primary motivator, as almost 11 percent of first-time travellers to Prince Edward Island visited primarily because of Anne of Green Gables attractions.

Anne's potential as a motivator is enhanced by the fact she has broad market appeal. While some segments are more interested than others, none of the Island's visitor segments appear to show unusually low or no interest.

At the present time, Anne appears to be somewhat of a primary motivator, however, a very troublesome finding is the fact that visitation is very weak for return visitors. This may require some further study to determine the underlying issue or problem. Also troublesome is the fact that well under half of the visitors to Anne attractions (43%) attended plays, performances or live theatre. Considering that Charlottetown has been using Anne of Green Gables – the Musical to headline the Charlottetown Festival for 43 years, and the play Anne and Gilbert recently finished its second successful year of production on PEI, this is concerning for two of PEI's most well known Anne attractions.

Perhaps the biggest concern from the data is the fact that return visitation to Anne attractions is very low. Decision makers need to know why this is the case. It is highly advisable to undertake some further research to determine the reason for this trend.

This weakness in return visitation to Anne attractions carries special implications for the visitor markets of Nova Scotia and New Brunswick, where return visitation is very high. These markets have not performed well in the Anne tourism category and a campaign specifically for these markets might be warranted. This campaign should be carefully considered and should be dependent on the research to determine why return visitation to Anne attractions is so low. The answer might be as simple as "been there, done that," so a marketing campaign that freshens the image of the Anne attractions, or that introduces new attractions may be required.