

**Maine Office of Tourism
Visitor Tracking Research
2011-2012 Winter/Spring Season
Topline Report**

Prepared by



July 2012

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Introduction and Methodology



Introduction

- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors.
- This research program was designed to:
 - Profile Maine visitors in demographic terms as well as in their travel patterns;
 - Explore perceptions of Maine among visitors;
 - Describe both seasonal and regional visitation patterns of Maine visitors;
 - Explore what Maine visitors like and dislike about the locations in Maine they have visited; and
 - Estimate levels of spending in Maine by residents and non-resident visitors.

Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the Research Now national online panel. Data is collected on an ongoing basis.
- Information is gathered using three main surveys:
 - Regional Travel Survey
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada; and have taken an overnight trip in Maine during the past four weeks.
 - Maine Day Visitor Survey
 - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who have taken a day trip in Maine within the past four weeks.
 - National Omnibus Survey
 - Includes a nationally balanced sample of US residents; and
 - Used to determine the incidence of travel nationwide and Maine's share of that travel.

Methodology

- This topline report outlines results from travel occurring between December 2011 and April 2012. It also compares to data collected during the prior two comparable seasons.
- Data was collected between February 1, 2012 and May 14, 2012. The number of completed surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 825
 - Maine Day Visitor Survey – 451
 - National Omnibus Survey – 6,707
- The report summarizes key measures from data collected for the winter 2012 season. Some seasonal adjustments may be made in the annual report.
- Whenever possible, winter 2012 data was compared to winter 2011 and winter 2010 data to show significant year-over-year differences.
- In this report, the year specified relates to the calendar year corresponding with January through March. Past winter reports were identified based on fiscal year.

Research Context

- **Weather:**

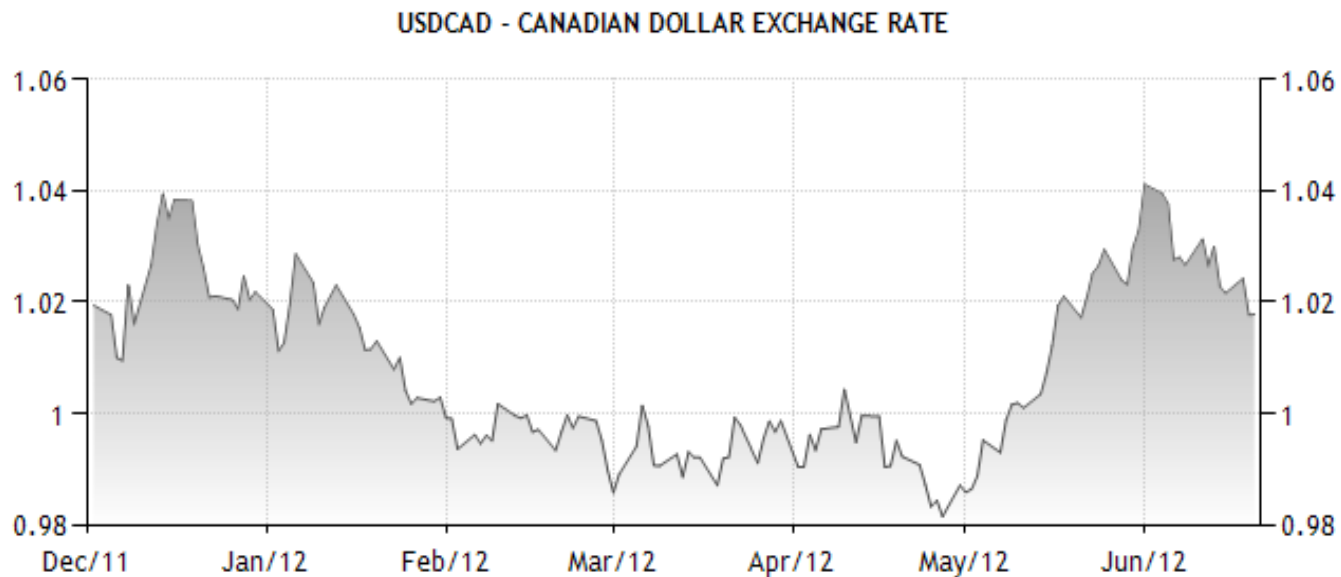
- The weather in winter 2012 is noted as being one of the mildest winters in recent history. Average temperatures for December, January, and February were nearly 5 degrees above normal with March being close to 8 degrees above normal.
- In addition to the mild temperatures there was also less precipitation than in a typical Maine winter, impacting the winter outdoor recreation season.

| | December | January | February | March | April |
|-----------------------------------------------------------|----------------|----------------|-----------------|-----------------|----------------|
| Average Temperature (vs.30-year average) | 33.3 (+4.5) | 26.9 (+4.6) | 30.6 (+5.1) | 41.2 (+7.7) | 47.0 (+3.0) |
| Measured Precipitation in Inches (vs. 30-year average) | 3.51 (-.51) | 4.29 (+.91) | 1.47 (-1.78) | 2.05 (-2.19) | 4.84 (+.52) |
| (NOAA.gov) | | | | | |

Research Context

- **Economy:**

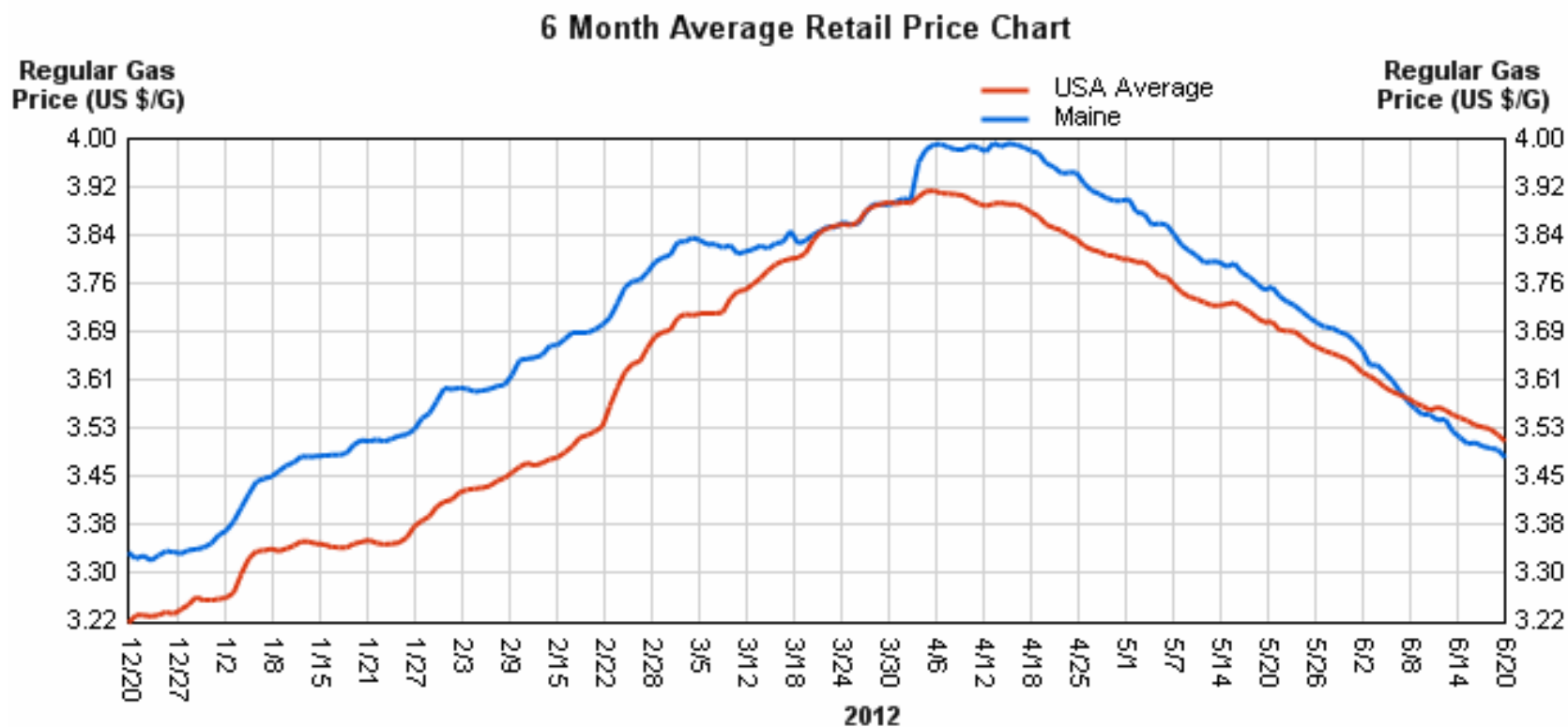
- **Employment:** The unemployment rate continued to fall, with April ending at an 7% unemployment rate in Maine. (Bureau of Labor Statistics)
- **Canadian Dollar:** The Canadian dollar remains fairly stable to the US dollar with a small spike seen in mid-December and returning to near unity in February, March, and April.



SOURCE: WWW.TRADINGECONOMICS.COM | OTC INTERBANK

Research Context

- **Gas Prices:** Maine gas prices tend to be slightly higher than the national average. Regional and national gas prices saw a steady increase in price per gallon – peaking in April at \$4.00 a gallon, but since then the price per gallon has eased.

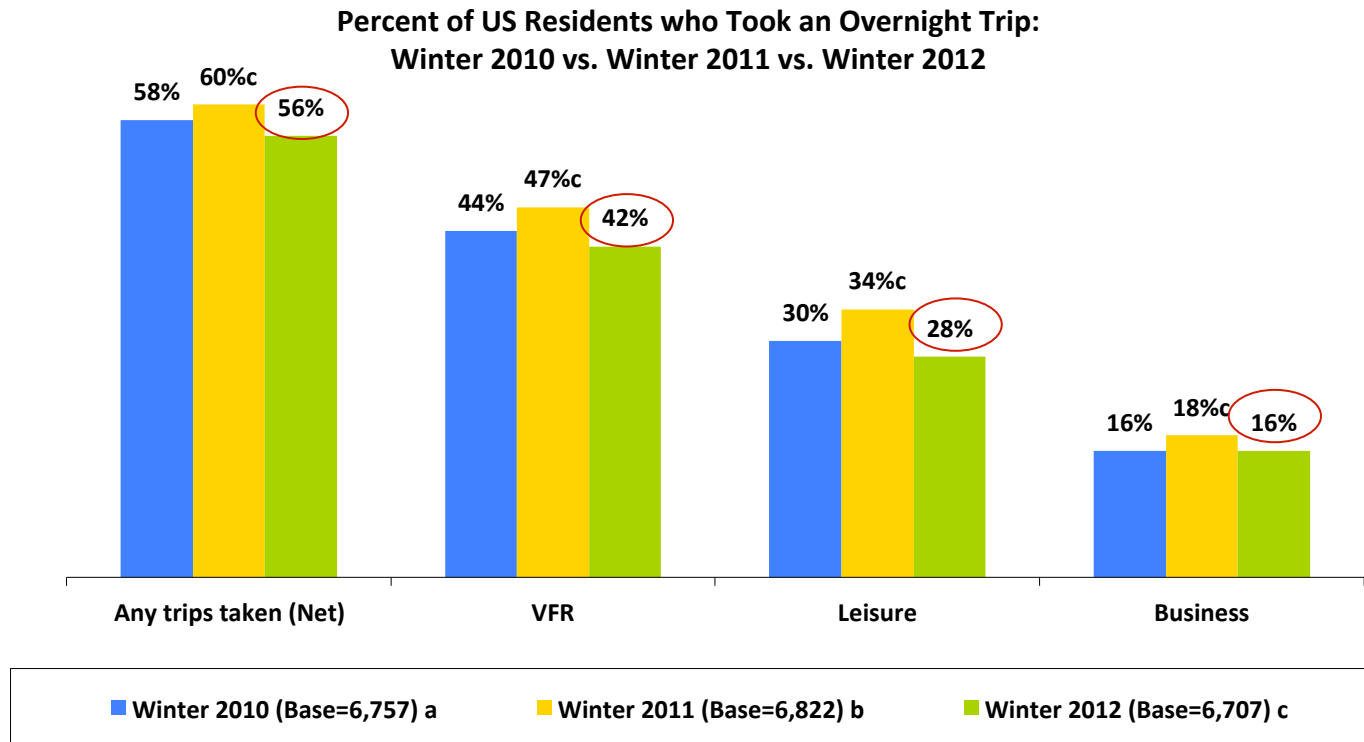


Maine's Overnight Travel Market Share



National Overnight Travel Context

- On a national level, travel is down year-over-year in all categories for the winter/spring season.



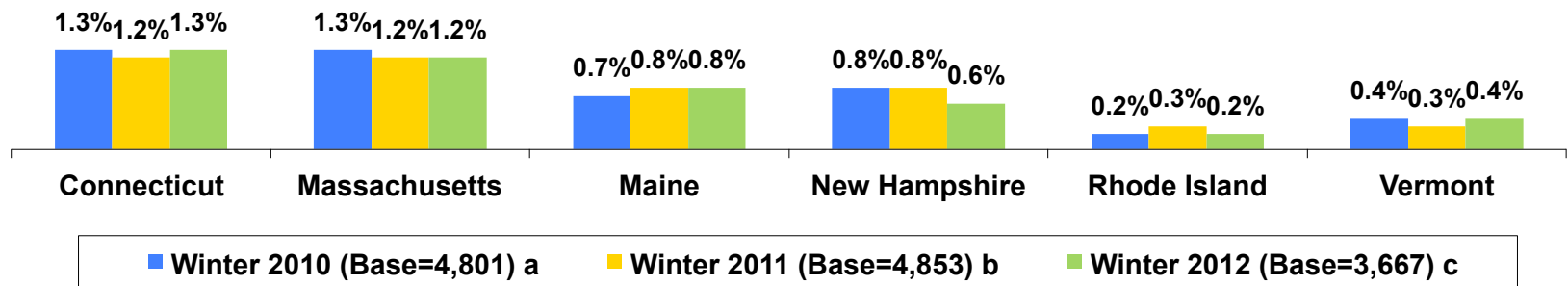
a, b, c significant difference at the 95% confidence level

Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

Maine's Overnight Market Share Compared to New England – *Leisure Travel*

- Travel shares to the New England region, including Maine, remain constant compared to last year.

US Leisure Travel Market Share*



a,b,c notes significant difference at the 95% confidence level.

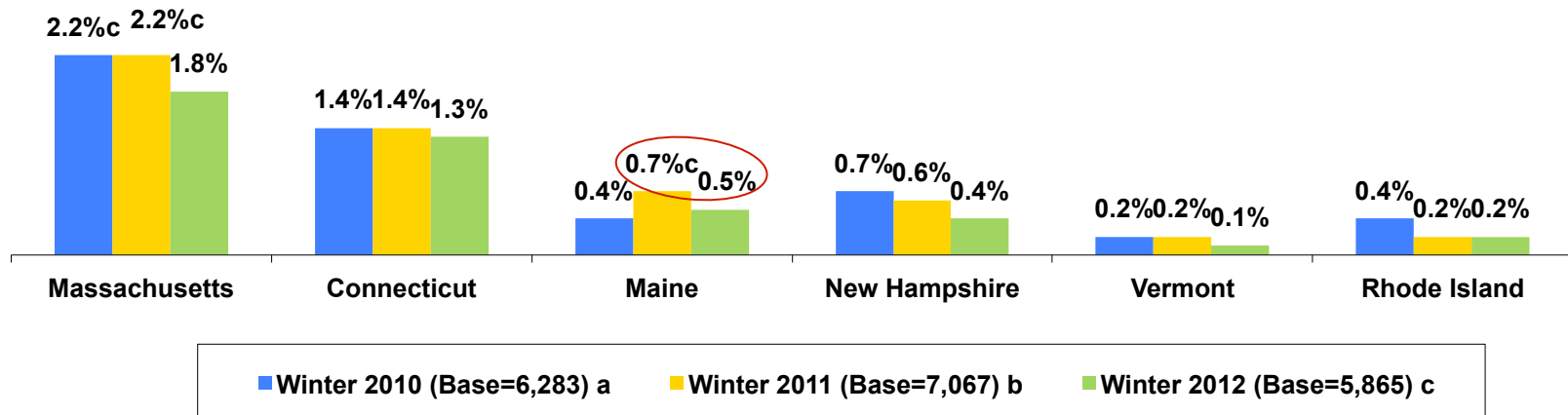
Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips?

*Share of total trips taken by U.S. residents

Maine's Overnight Market Share Compared to New England – VFR Travel

- The share of VFR travel to Maine decreased slightly in winter 2012, returning to levels seen in 2010. This decrease is likely due in part to the overall mild winter experienced by the New England region.
- Massachusetts also experienced a significant decrease in VFR travel compared to prior years.

US Travel to Visit Friends/Relatives Market Share*



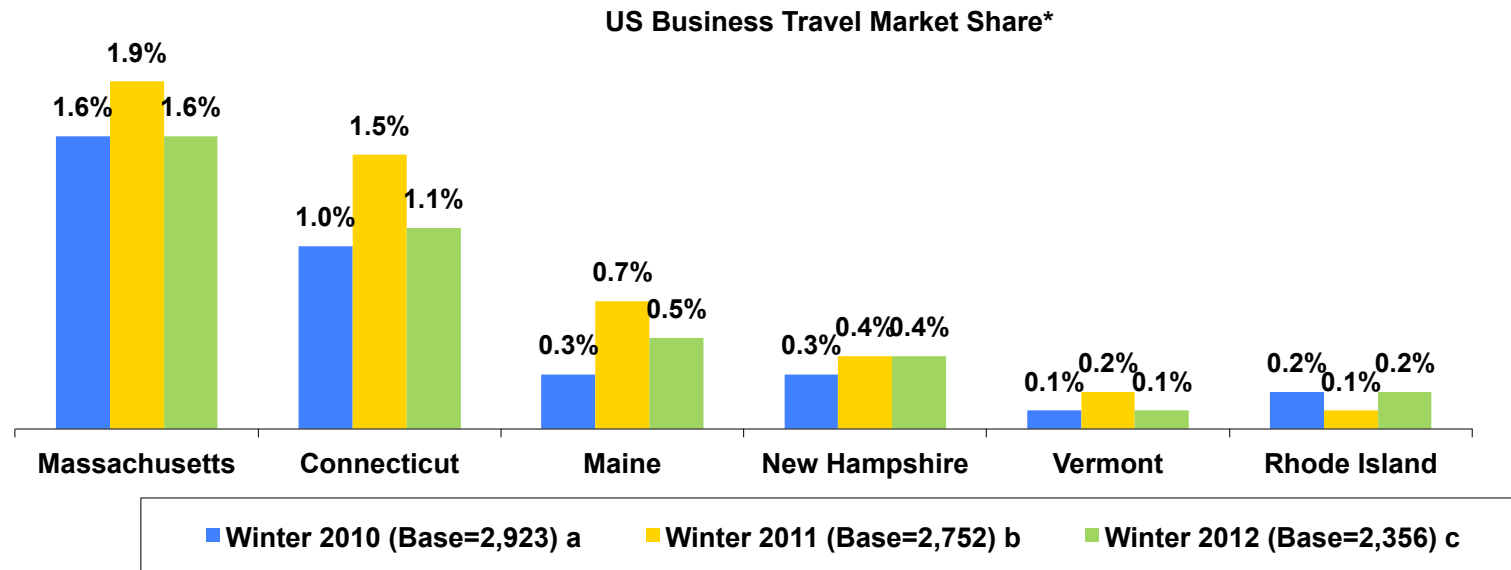
a,b,c indicates significant difference at the 95% confidence level

Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips?

*Share of total trips taken by U.S. residents.

Maine's Overnight Market Share Compared to New England – *Business Travel*

- Maine's overnight business travel share remains constant as compared to the same period in prior years.
- Business travel shares in other New England states also remained stable.



a, b, c indicates significant difference at the 95% confidence level

Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips?

** Share of total trips taken by U.S. residents.*

Winter Visitation to Maine



Estimated Visitation to Maine*

- There were an estimated 1.2 million overnight trips to Maine in winter 2012, resulting in 2.9 million overnight visitors. Despite weather conditions, this represents a small year-over-year increase in the number of visitors to the state in winter 2011.
- Similar to the year-over-year increase in overnight visitation, there was a slight increase in day visitors in winter 2011. This resulted in about 2.5 million day visitors to Maine during this period.
- It is worth noting that during winter 2012 VFR was down, particularly among overnight visitors, with that decline being offset by increases in leisure.

| Overnight Visitation | | | | | |
|-------------------------|-----------|---------|----------|-----------|--------------|
| | Leisure | VFR | Business | Total | 2011 v. 2012 |
| Overnight Trips 2012 | 597,734 | 434,083 | 213,559 | 1,245,377 | +3.0% |
| Overnight Visitors 2012 | 1,572,042 | 928,937 | 414,305 | 2,915,284 | +1.1% |
| Day Visitation | | | | | |
| | Leisure | VFR | Business | Total | 2011 v. 2012 |
| Day Trips 2012 | 542,993 | 314,425 | 265,695 | 1,123,114 | +5.3% |
| Day Visitors 2012 | 1,238,024 | 723,178 | 526,077 | 2,487,279 | +0.1% |

**Note: Visitation estimates provided here are preliminary and reflect visitation between mid-December through May. Adjustments may be made to these estimates in the annual report to account for seasonal fluctuations.*

Maine Travel Profile Overnight and Day Visitors



Visitor Profile



Demographics

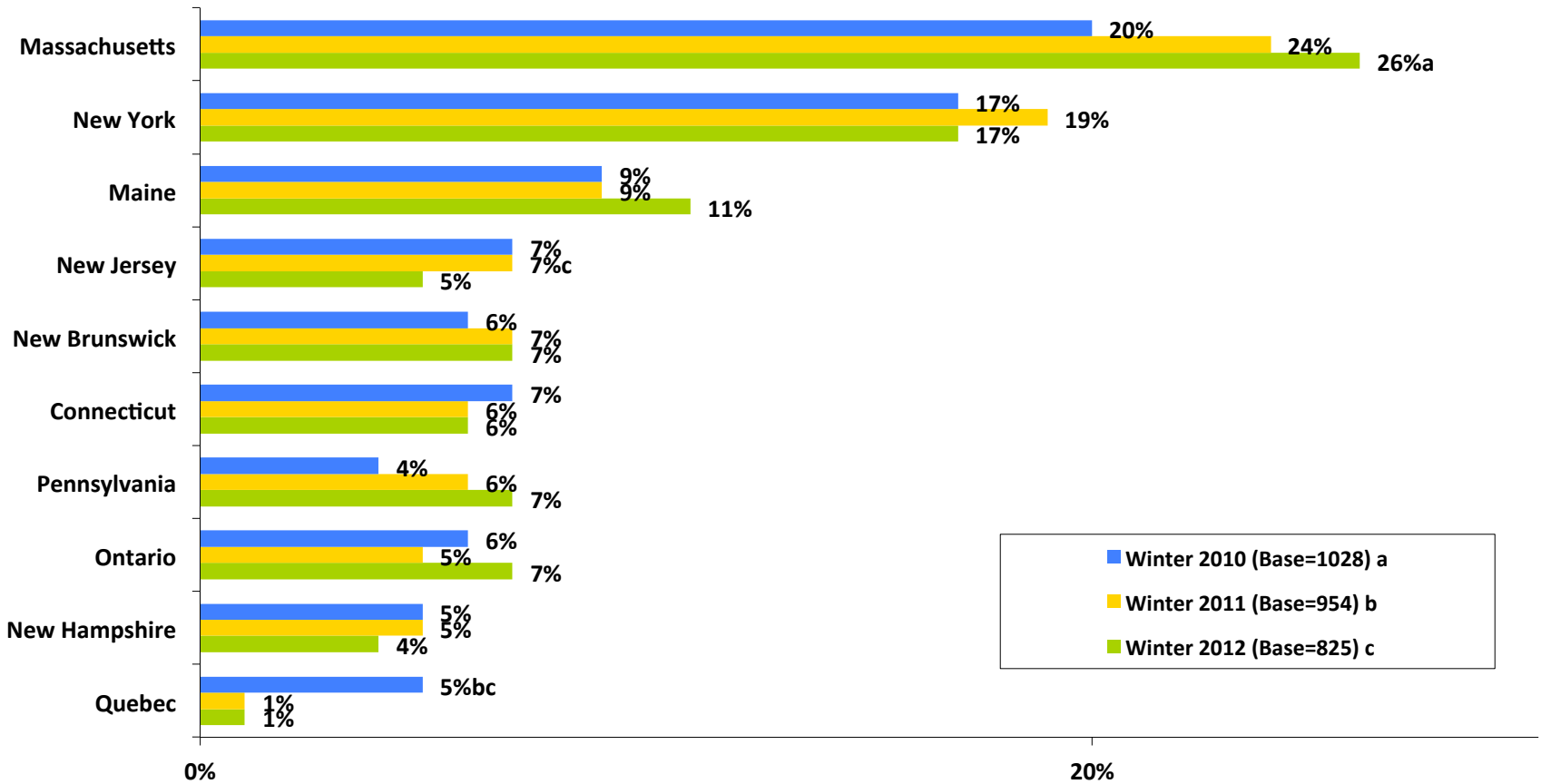
- Particularly among overnight visitors, this winter drew more older visitors to Maine than we have seen in prior years. This is likely driven by the poor snow conditions attracting fewer outdoor winter recreation enthusiasts.

| | Overnight Visitors | | | Day Visitors | | |
|--------------------------|------------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | Winter 2010 (Base=1028) a | Winter 2011 (Base=954) b | Winter 2012 (Base=825) c | Winter 2010 (Base=561) d | Winter 2011 (Base=509) e | Winter 2012 (Base=451) f |
| Age | | | | | | |
| < 35 | 40% | 37% | 28% | 25%f | 23% | 18% |
| 35 – 44 | 18% | 18% | 16% | 17% | 17% | 16% |
| 45 – 54 | 19% | 20% | 21% | 22% | 22% | 21% |
| 55 + | 23% | 25% | 36%ab | 35% | 38% | 45%e |
| Mean | 42.0 | 42.7 | 46.9ab | 47.6 | 48.0 | 50.6e |
| Income | | | | | | |
| < \$50,000 | 15% | 14% | 14% | 24% | 22% | 18% |
| \$50,000 - \$99,000 | 32% | 33% | 36% | 44% | 43% | 40% |
| \$100,000 + | 37% | 40% | 35% | 32% | 35% | 42% |
| Mean | 102,040 | \$107,820a | \$103,690 | \$85,980 | \$92,400d | \$99,320d |
| Female | 44% | 52%a | 46% | 46% | 55%f | 46% |
| College Degree or Higher | 79% | 80% | 80% | 72% | 72% | 72% |
| Married | 54% | 55% | 60%a | 64% | 62% | 64% |
| Employed Full Time | 67% | 67% | 62% | 58% | 54% | 62%e |

a, b, c/d, e, f indicates significant difference at the 95% confidence level

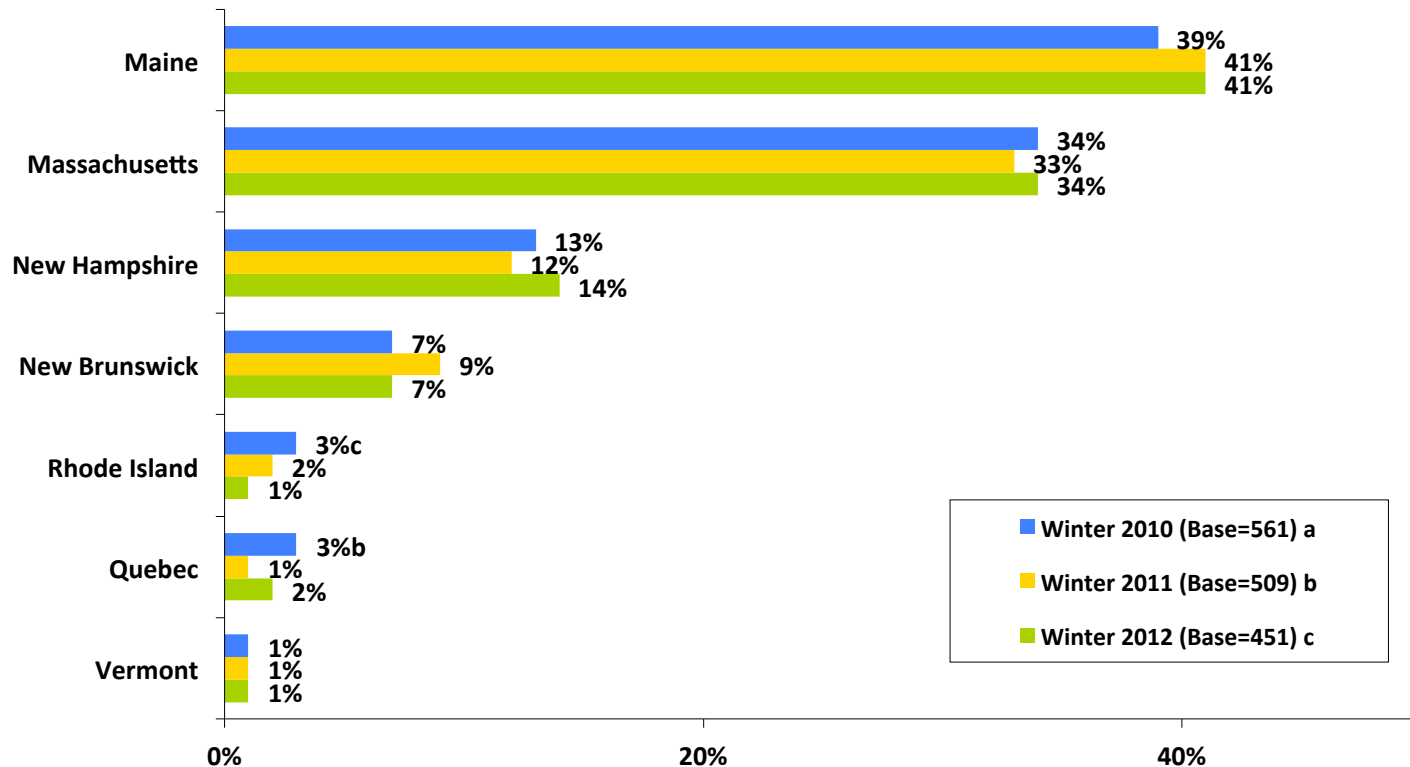
Residence of Maine Overnight Visitors

- Overnight visitation to Maine this winter was led by visitation from Massachusetts, followed by New York.



Residence of Maine Day Visitors

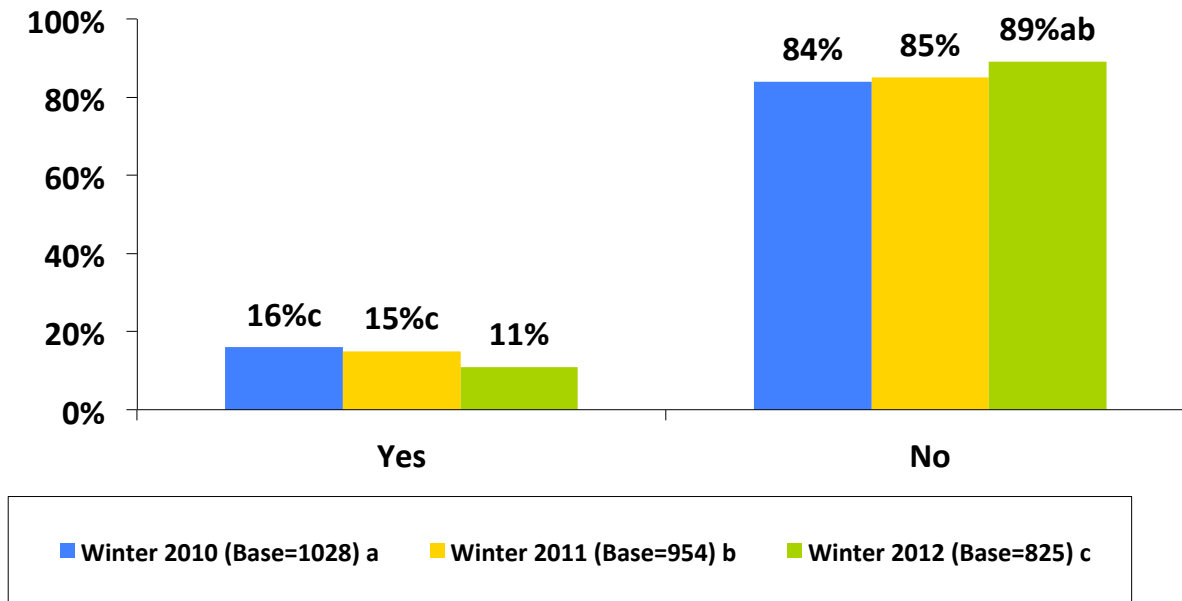
- There is no year-over-year changes in the residential profile of day visitors to Maine in 2012, as those traveling within the state, or coming from Massachusetts make up the majority of day visitors.



Repeat versus First Time Overnight Visitors

- Repeat visitation among overnight visitors increased significantly in winter 2012. Consequently, those who report visiting Maine for the first time is significantly lower compared to previous years.

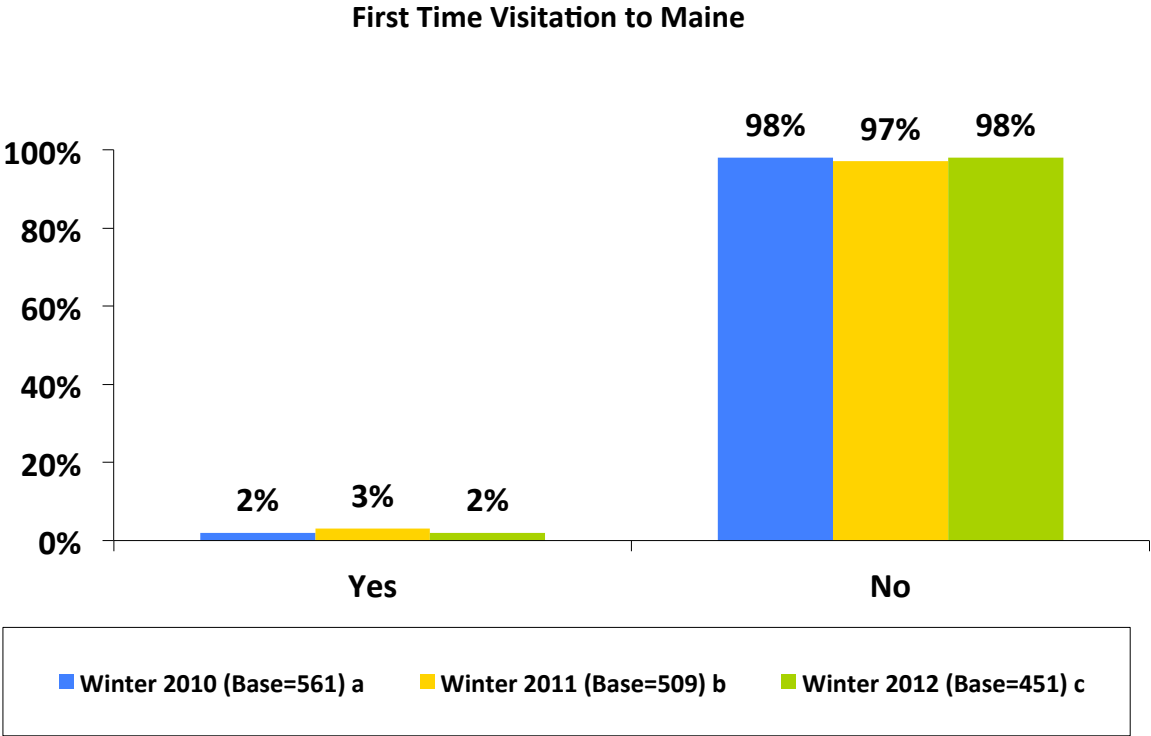
First Time Visitation to Maine



*a,b,c indicates significant difference at the 95% confidence level
Regional Q9. Was this your first visit in Maine?*

Repeat versus First Time Day Visitors

- The percentage of day visitors to Maine who reported that it was their first visit to the state remained consistent with prior years.



*a, b, c indicate significant difference at the 95% confidence level
Day Q4. Was this your first trip to Maine?*

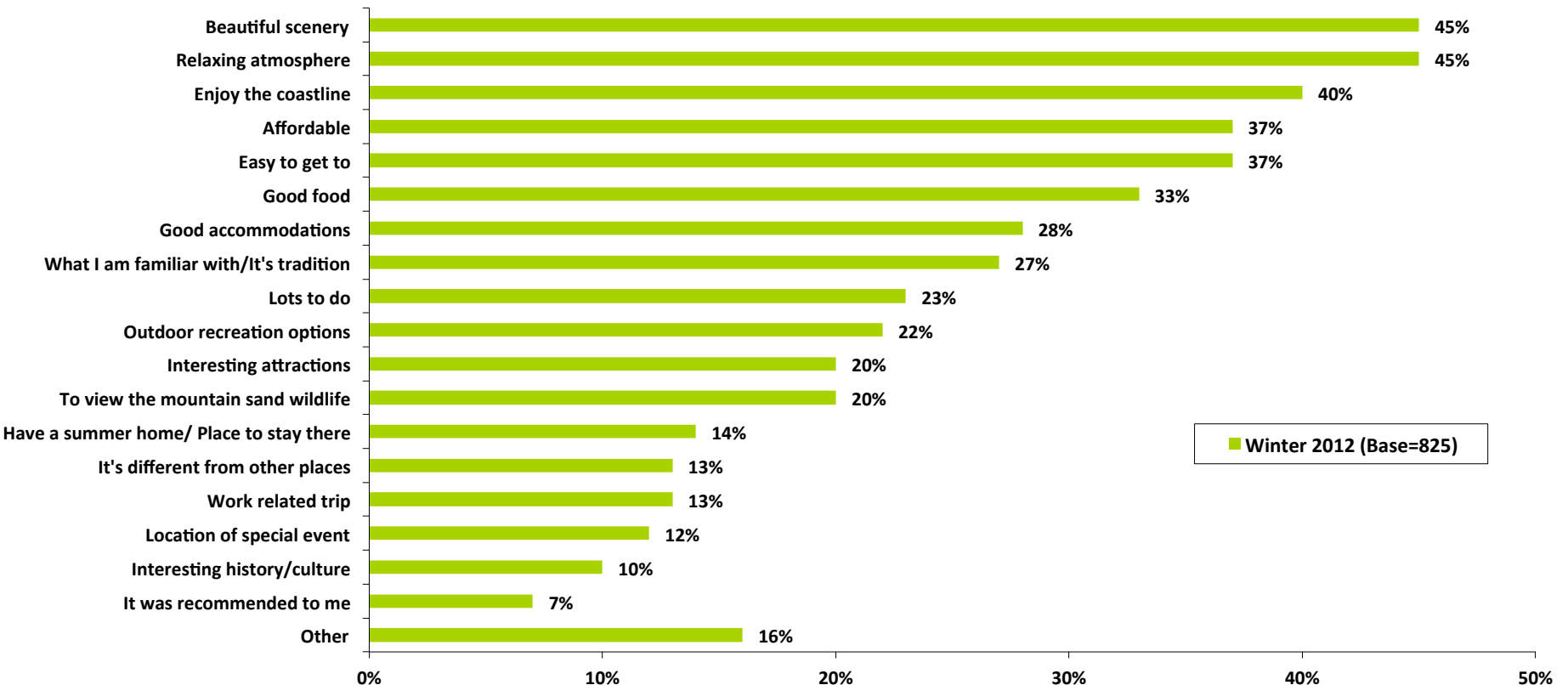
Trip Profile



Reasons for Selecting Maine – Overnight Visitors

- *Beautiful scenery, relaxing atmosphere, and the coastline are top reasons why overnight visitors select Maine as a travel destination. Affordability, convenience, and food were also motivating factors in choosing Maine.*

Reasons for Selecting Maine



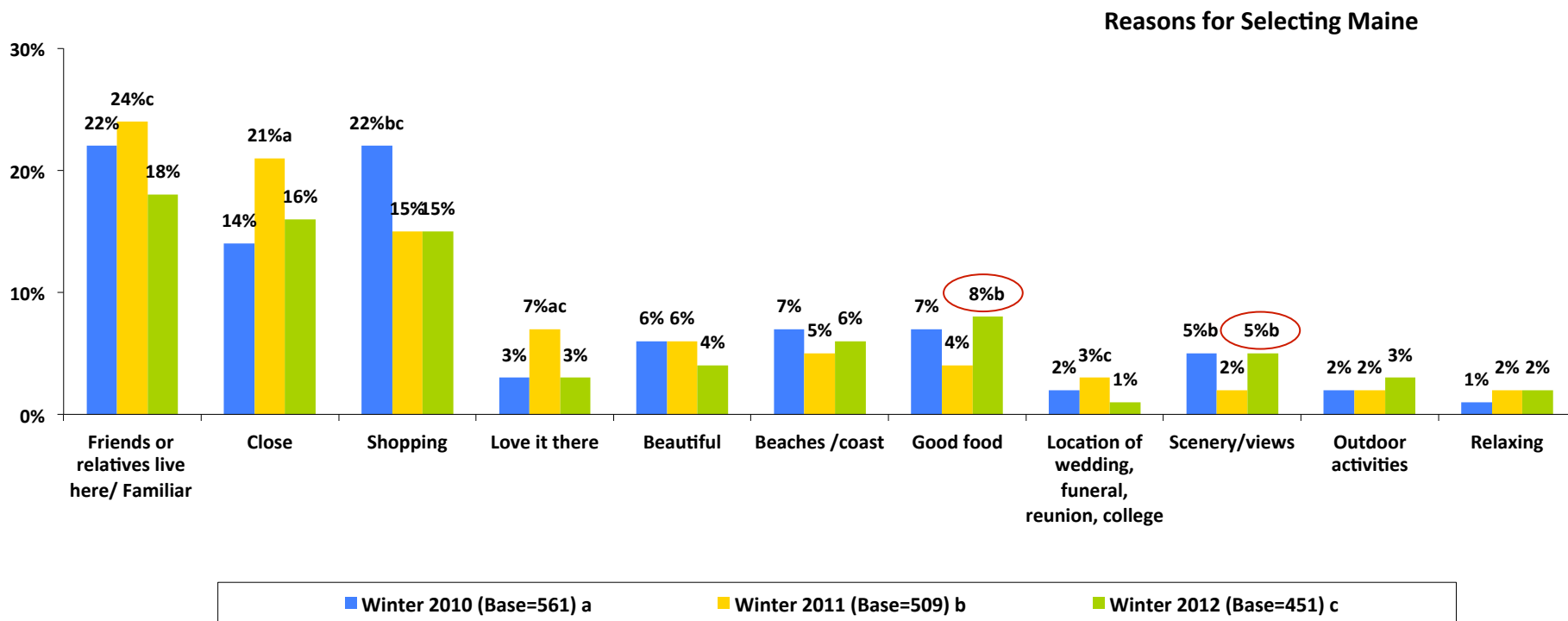
a,b,c indicates significant difference at the 95% confidence level

Regional Q16. Thinking about all the places you could have chosen to visit on this trip, why did you choose Maine? Please check all that apply.

**Note: Question revised in 2012 to be pre-coded rather than open end - no longer comparable to previous years data*

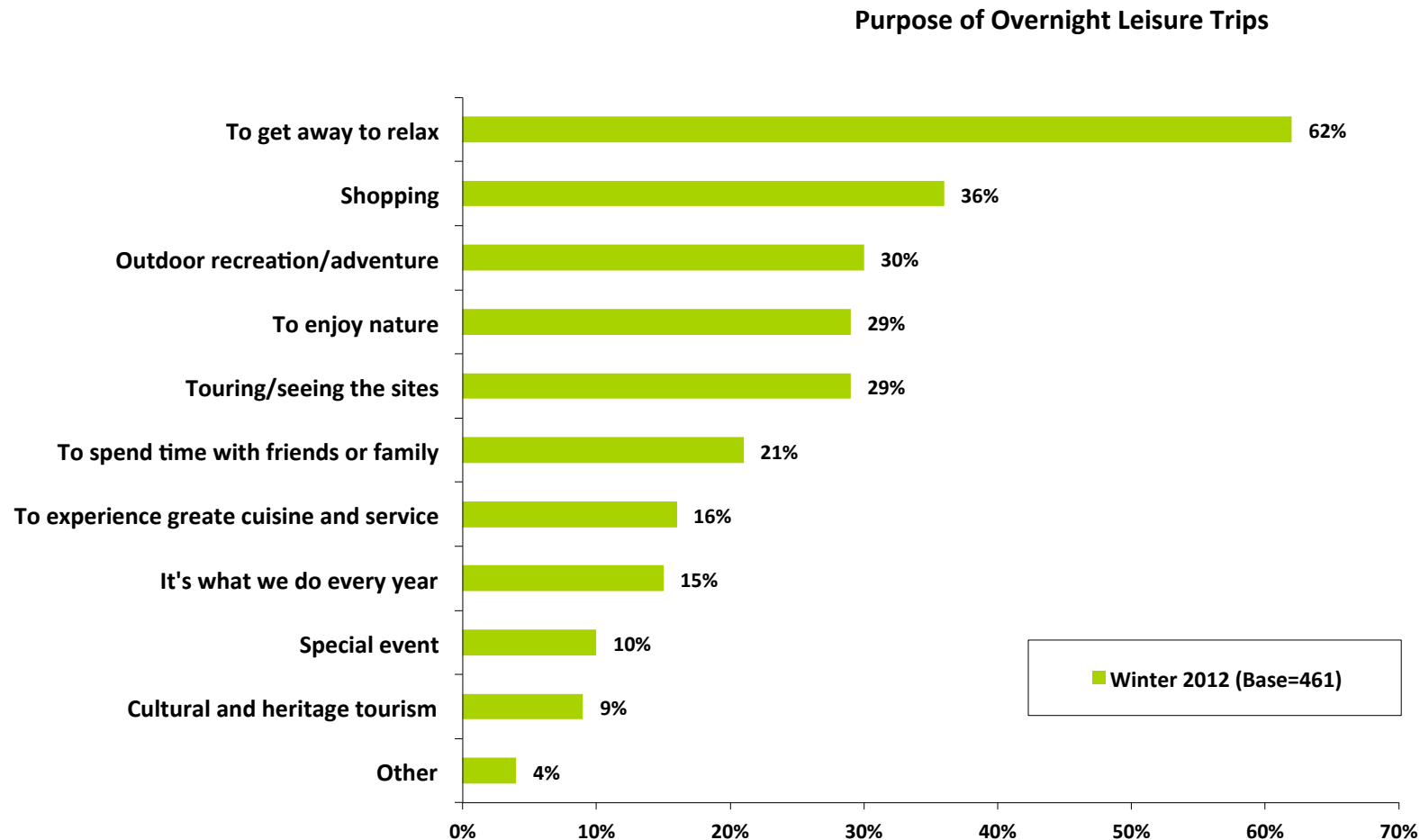
Reasons for Selecting Maine – Day Visitors

- The most popular reasons for day visitors to visit Maine are visiting friends and/or family, their proximity to Maine, and also shopping.
- *Good food* and *scenery/views* saw significant increases as the reason for traveling to Maine in the winter of 2012



Purpose of Overnight Leisure Trips

- *Relaxation, shopping and outdoor recreation* are the most commonly cited reasons overnight visitors choose to visit Maine during the winter/spring season.



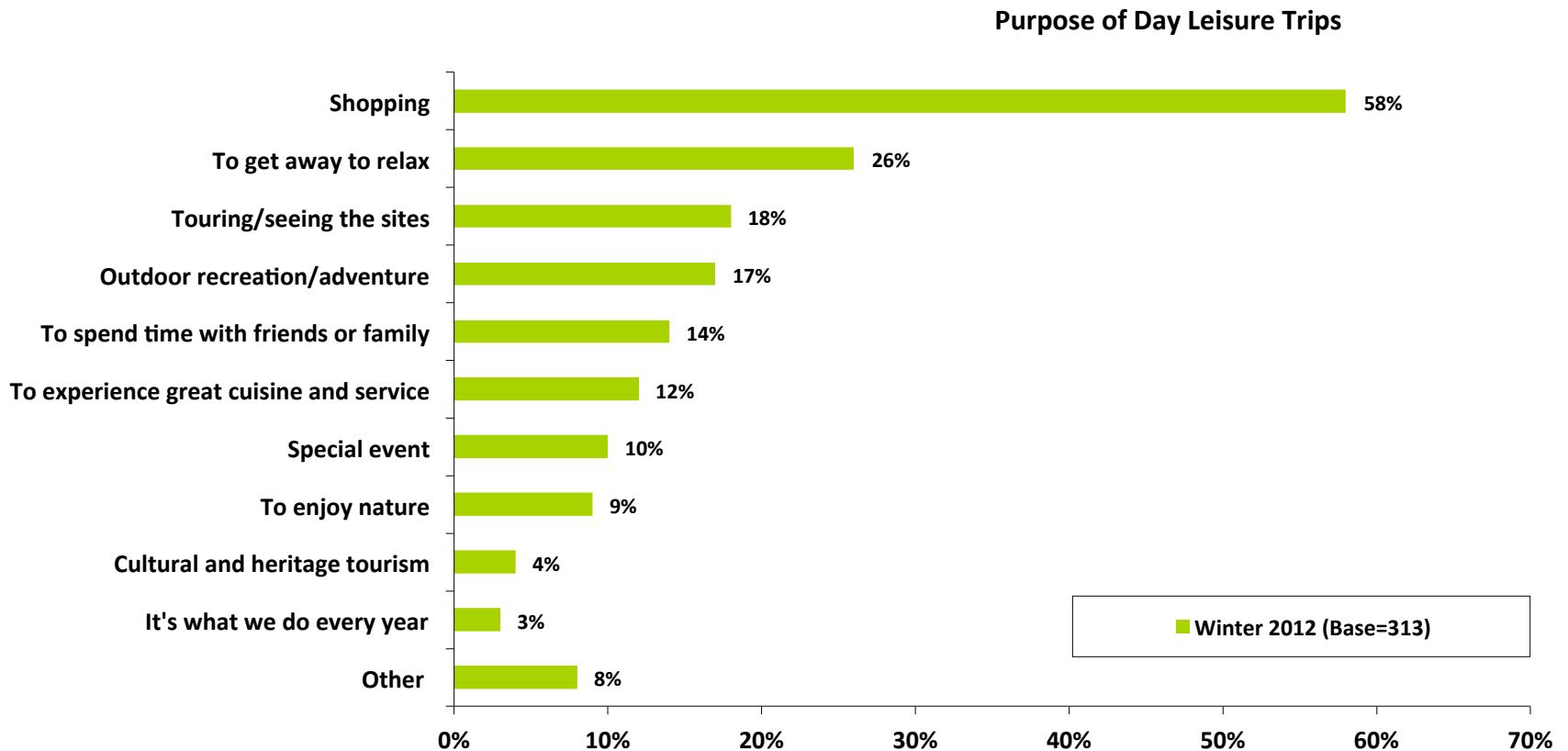
a,b indicates significant difference at the 95% confidence level

Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?

Note: Question revised in 2012 to be multi-punch no longer comparable to previous years data

Purpose of Leisure Day Trips

- Similar to overnight visitors, *shopping* and *relaxation* are common reasons day visitors choose to come to Maine.



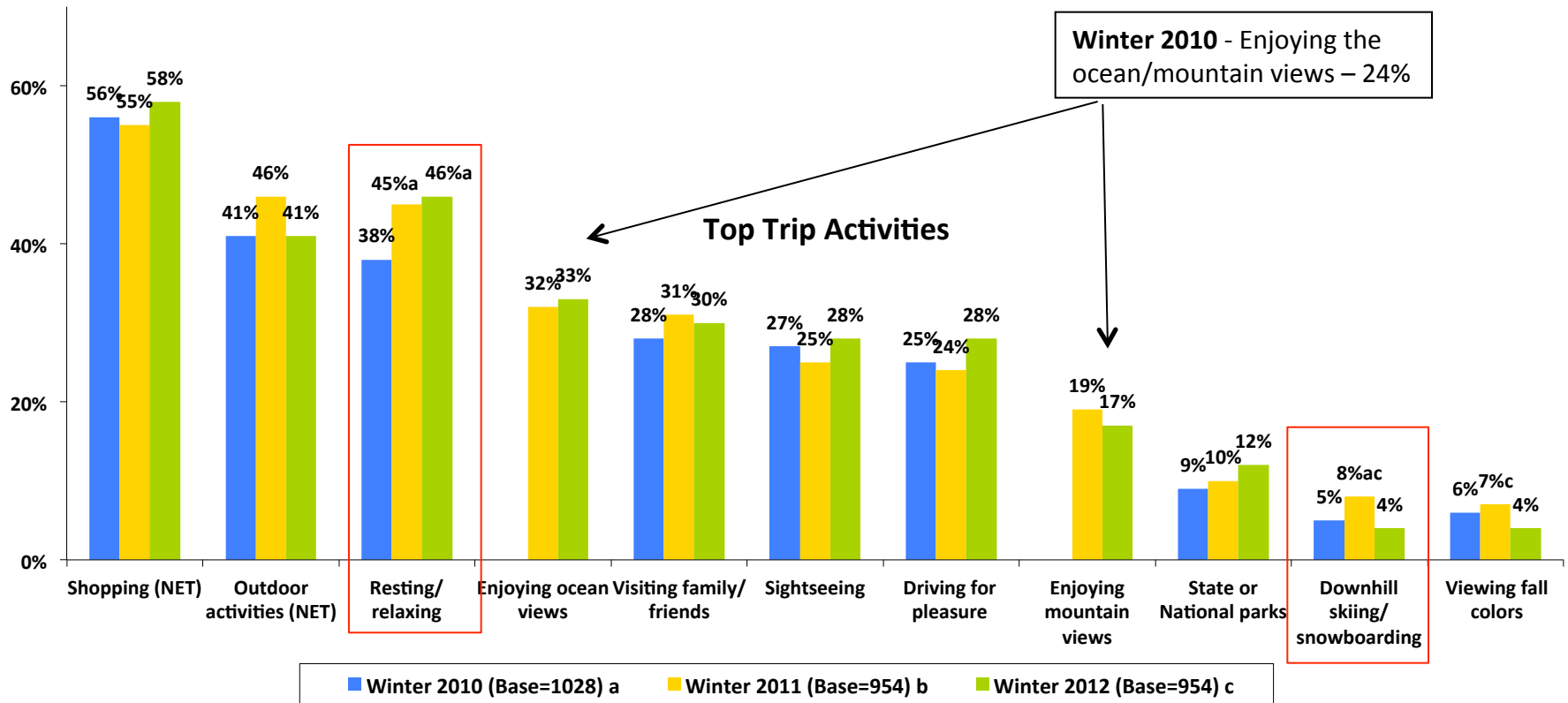
Regions Visited within Maine

- The Maine Beaches and Greater Portland / Casco Bay continue to be the most common regional destinations among all visitors in 2012.
- Aroostook County saw a significant decline in overnight visitors in winter 2012 when compared to 2011, while Maine Lakes and Mountains continues to see a directional increase in day visitors compared to prior years.

| | Overnight Visitors | | | Day Visitors | | |
|-------------------------------|------------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| | Winter 2010 (n=1,028) a % | Winter 2011 (n=954) b % | Winter 2012 (n=825) c % | Winter 2010 (n=561) d % | Winter 2011 (n=509) e % | Winter 2012 (n=451) f % |
| The Maine Beaches | 24% | 19% | 25% ^b | 34% | 29% | 29% |
| Greater Portland / Casco Bay | 18% | 19% | 19% | 20% | 21% | 20% |
| The Maine Highlands | 16% ^c | 14% | 11% | 8% | 12% | 10% |
| Downeast & Acadia | 11% | 13% | 12% | 7% | 9% | 6% |
| Maine Lakes & Mountains | 10% | 12% | 11% | 7% | 9% | 11% ^d |
| Mid-Coast | 10% | 11% | 13% | 9% | 8% | 10% |
| Kennebec & Moose River Valley | 8% | 6% | 6% | 9% | 6% | 9% |
| Aroostook County | 2% | 5% ^{ac} | 2% | 3% | 4% | 4% |

Trip Activities – Overnight Visitors

- Notably, resting / relaxing continues to maintain its upward trend seen in winter 2011, joining shopping and outdoor recreation among the most common trip activities.
- Downhill skiing / snowboarding declined to 2010 levels following a spike in 2011. A mild winter most likely contributed to this decline.



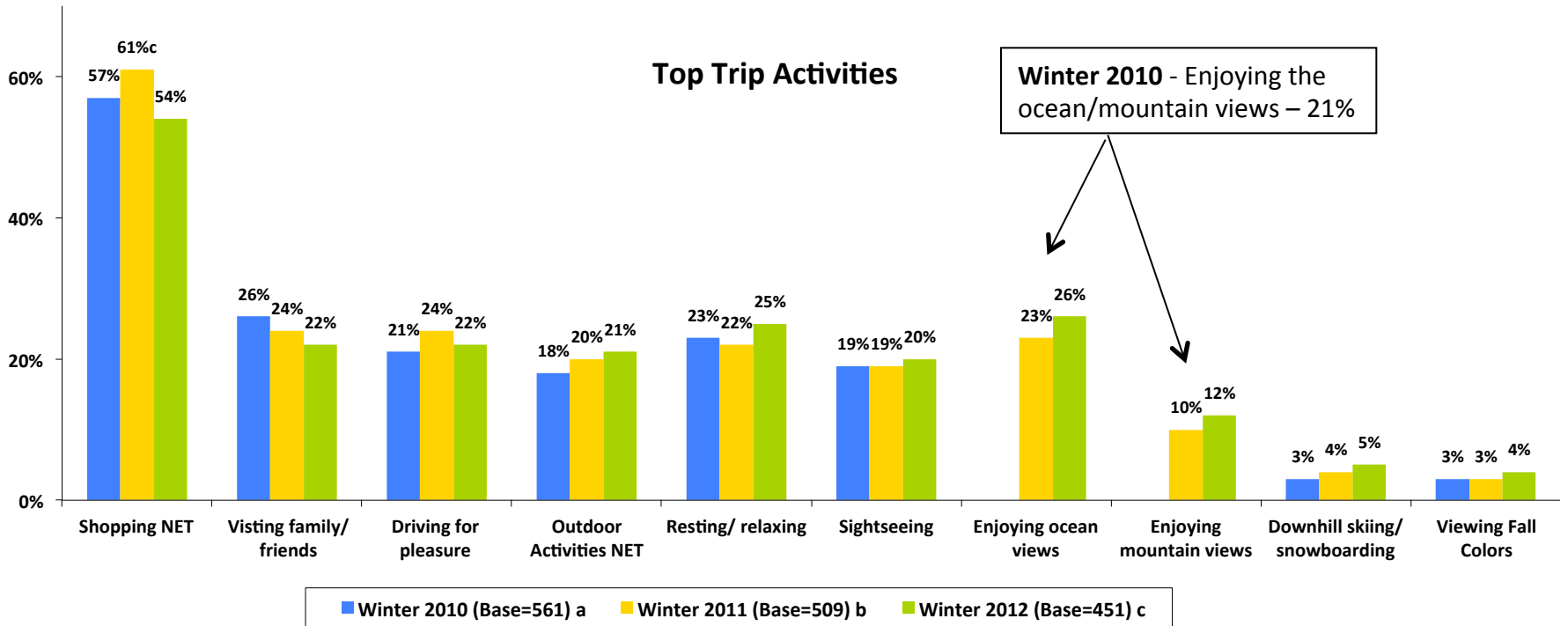
a,b,c indicates significant difference at the 95% confidence level

Regional Q32. In which of the following activities did you participate during this trip/your most recent trip in Maine? (Please check all that apply)

Note: Enjoying ocean/mountain views changed to two separate answers in 2011.

Trip Activities – Day Visitors

- Although mentioned less frequently in winter 2012, shopping remains the dominant day visitor activity travelers report doing during their trip.
- Overall, day visitor activities are similar to those engaged in during prior years.



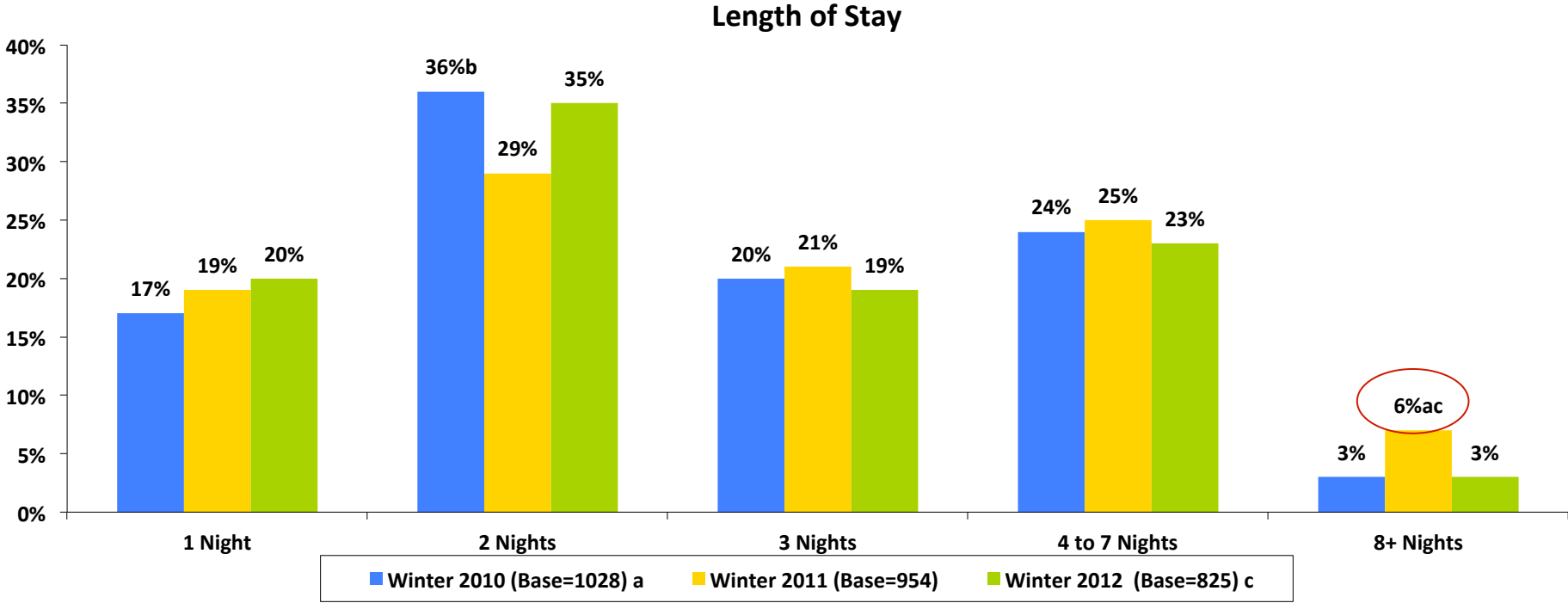
a,b,c indicates significant difference at the 95% confidence level

Day Q10. In which of the following activities did you participate during this trip/your most recent trip in Maine? (Please check all that apply).

Note: Enjoying ocean/mountain views changed to two separate answers in 2011.

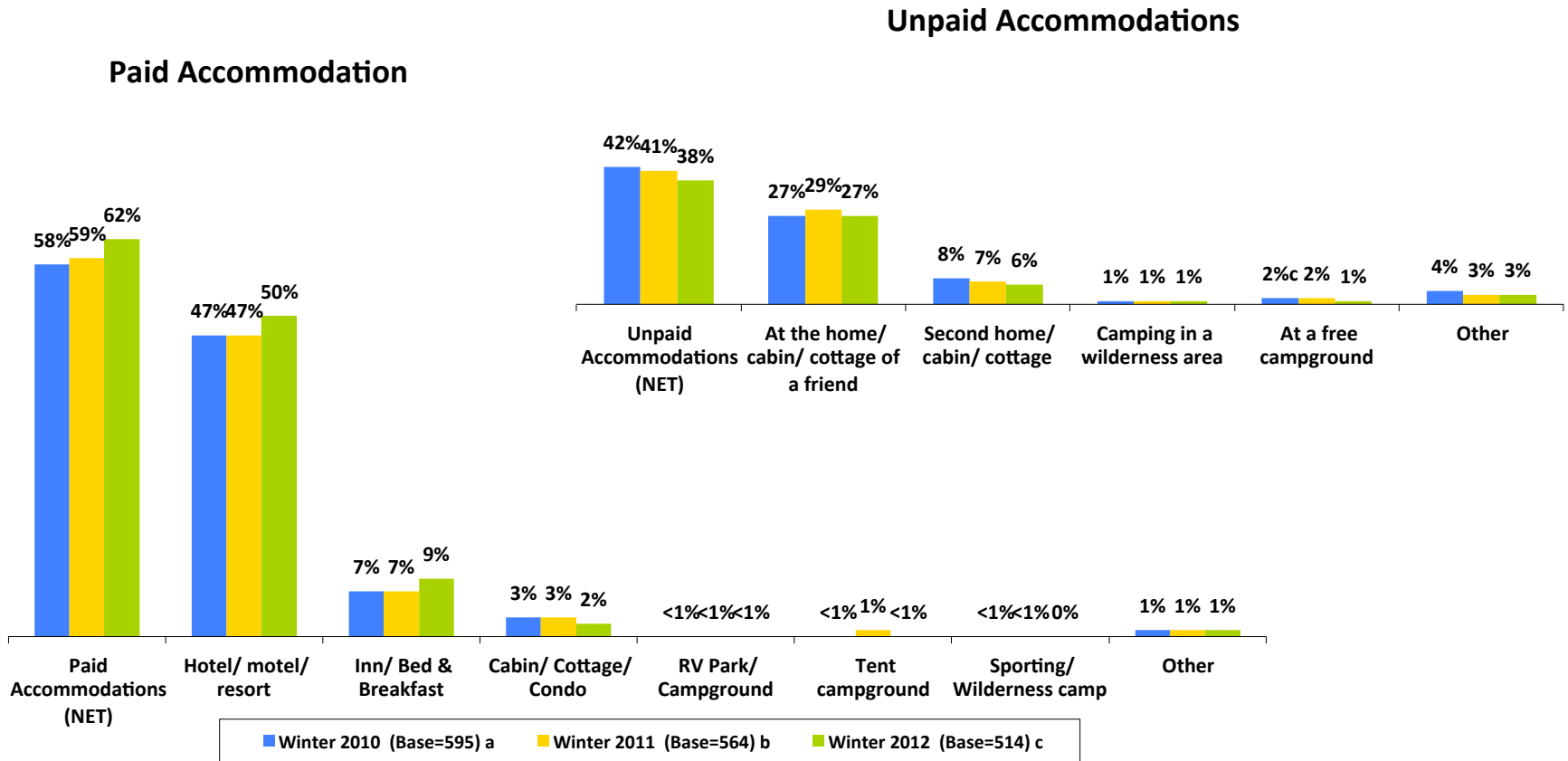
Length of Stay

- Maine visitors tended to spend less time in Maine than last year (an average of 3.1 nights in winter of 2012 vs. 3.3 in winter of 2011). This is driven in part by a reduction in visitors spending eight nights or more on their trip.



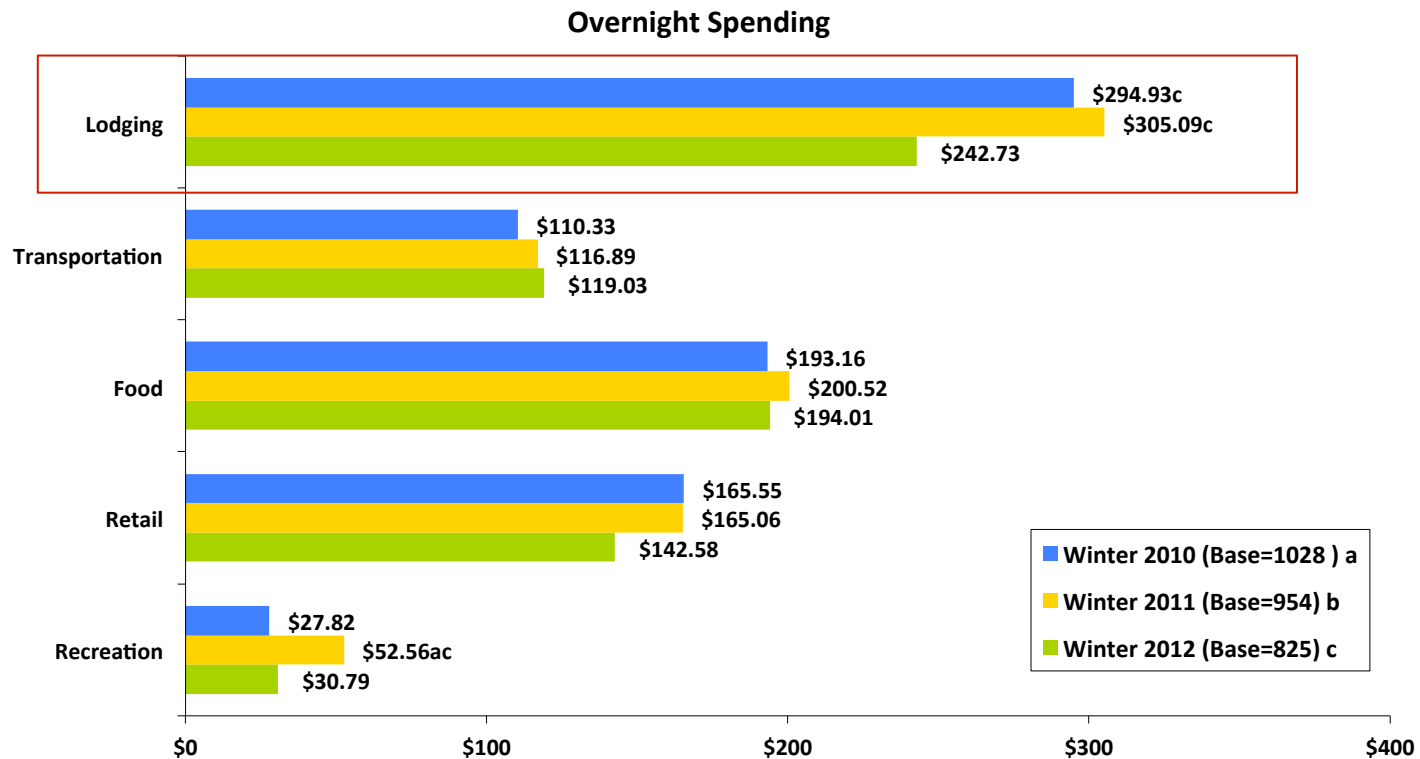
Accommodations in Maine

- Positively, this season's share of visitors staying in paid accommodations remained consistent with last year, with the half choosing to stay in a hotel/motel/resort.



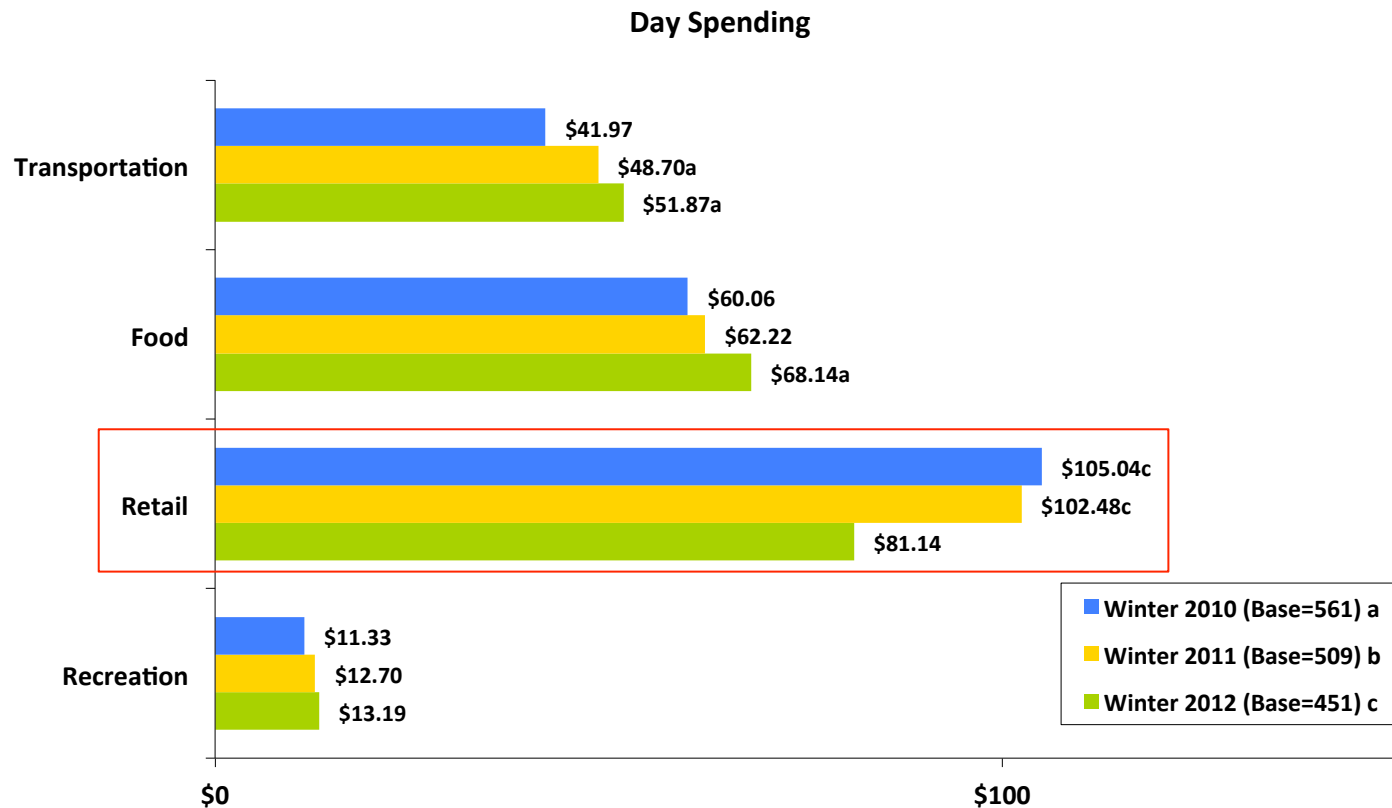
Overnight Trip Spending Per Trip

- Lodging spending per trip decreased significantly compared to prior years, driven by a decrease in hotel spending. This is the result of several factors, including shorter trip lengths and a move away from more expensive lodging associated with winter outdoor recreation activities.
- Spending in other categories remained statistically stable, with the exception of recreation which declined to 2010 levels.



Day Trip Spending

- Transportation and recreation spending for winter 2012 day visitors remained constant, while spending on food continues to steadily increase.
- Related to the decrease in shopping done by day visitors, retail spending declined significantly compared to prior winter seasons. Some of this may be continued recessionary concerns as well as the impact of the mid-season spike in gas prices taking a greater share of wallet.



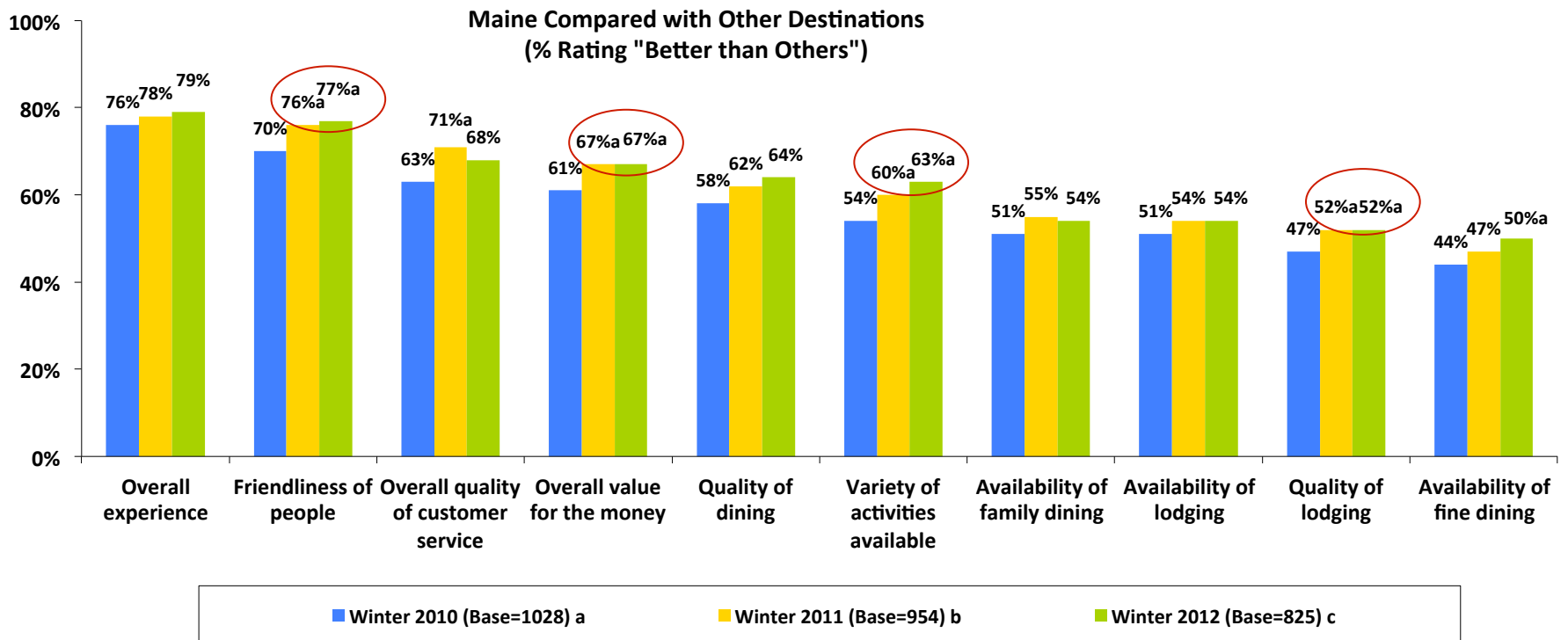
*a, b, c indicates significant difference at the 95% confidence level
Day Q14. Please tell us the total amount of money you and your immediate travel party spent on this trip to Maine.*

Trip Evaluation



Evaluation of Maine Compared to Other Destinations – Overnight Visitors

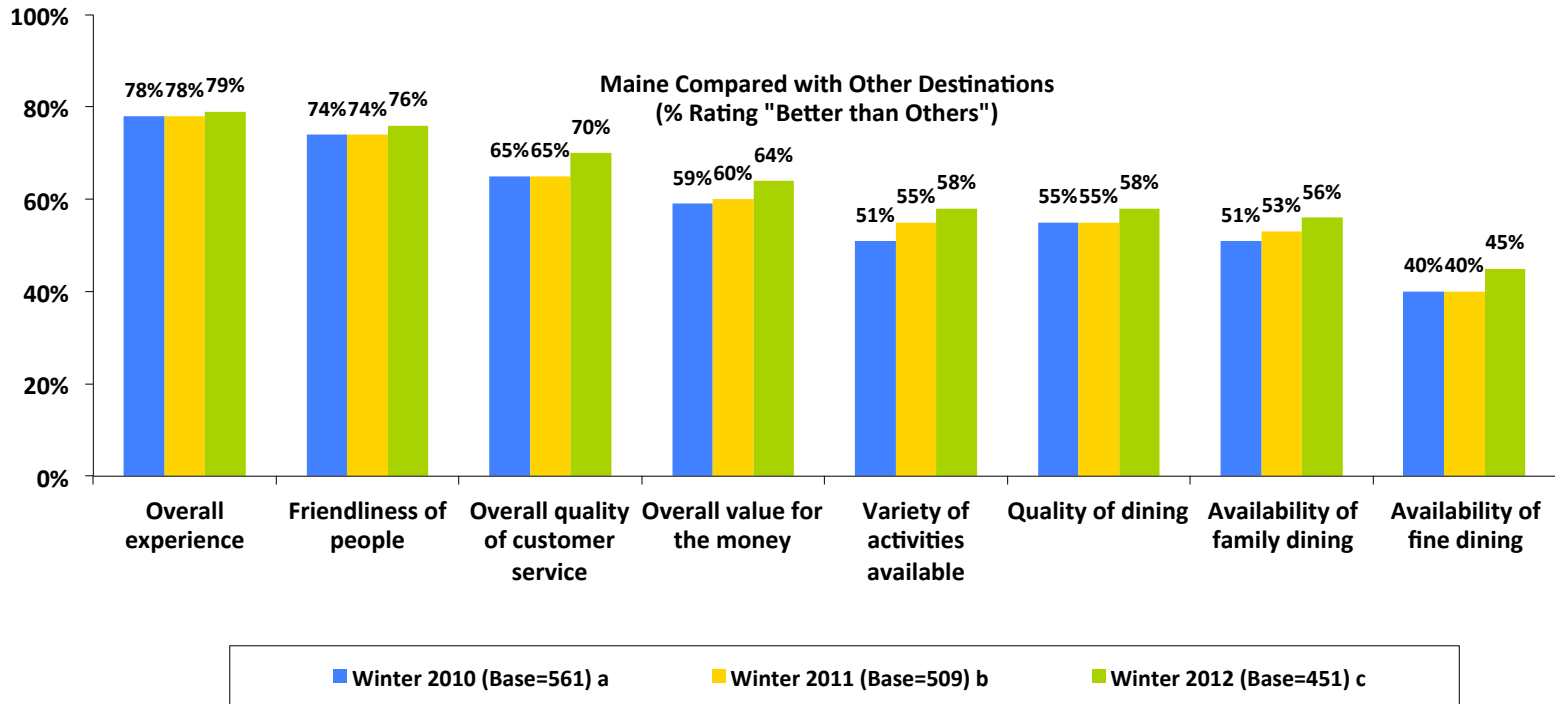
- Overnight visitors continue to rate Maine favorably across most attributes. *Friendliness of the people, value for the money, variety of activities, and quality of lodging* continue to trend higher than in the winter 2010.



a, b, c indicates significant difference at the 95% confidence level
 Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.

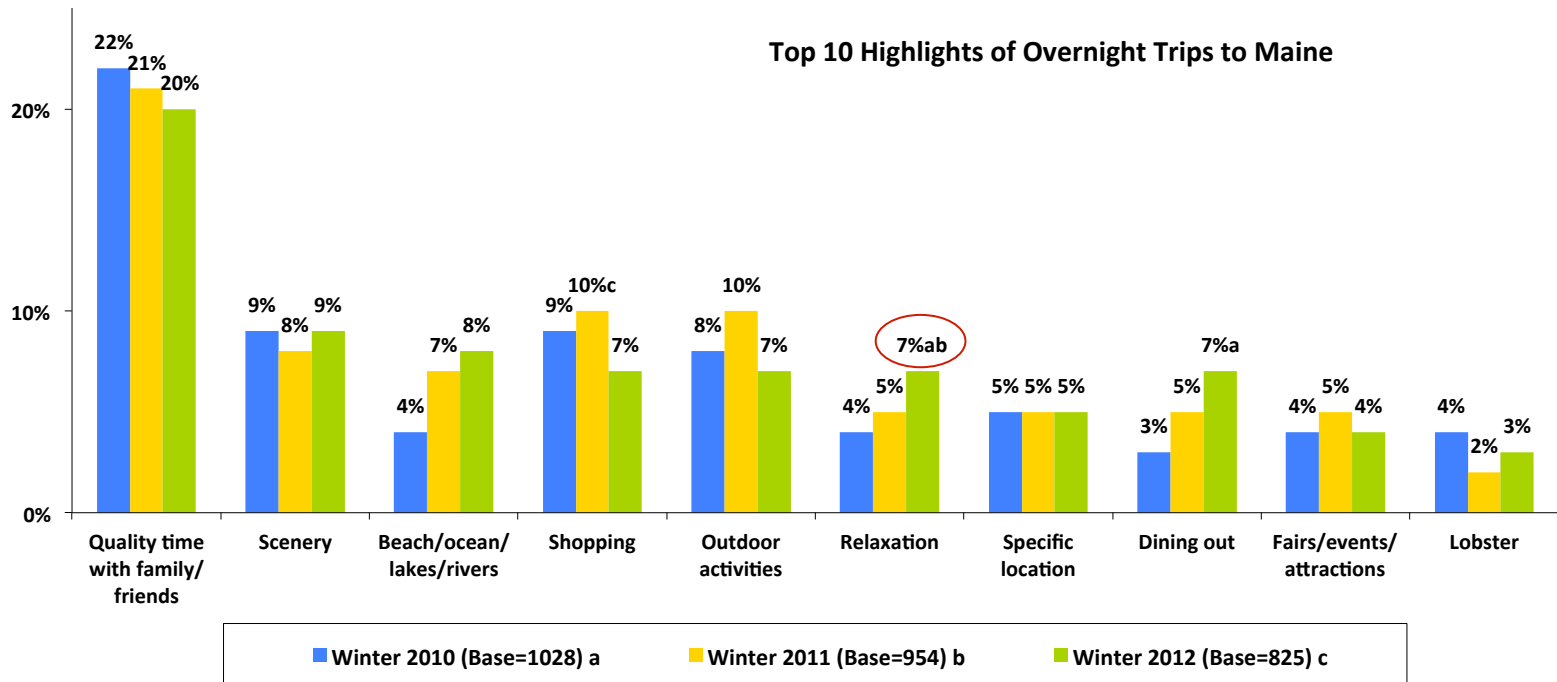
Evaluation of Maine Compared to Other Destinations – Day Visitors

- Perceptions of Maine relative to other destinations remain stable between winter 2012 and winter 2011.
- Maine scores particularly well against other destinations in *overall experience* and *friendliness of people*.



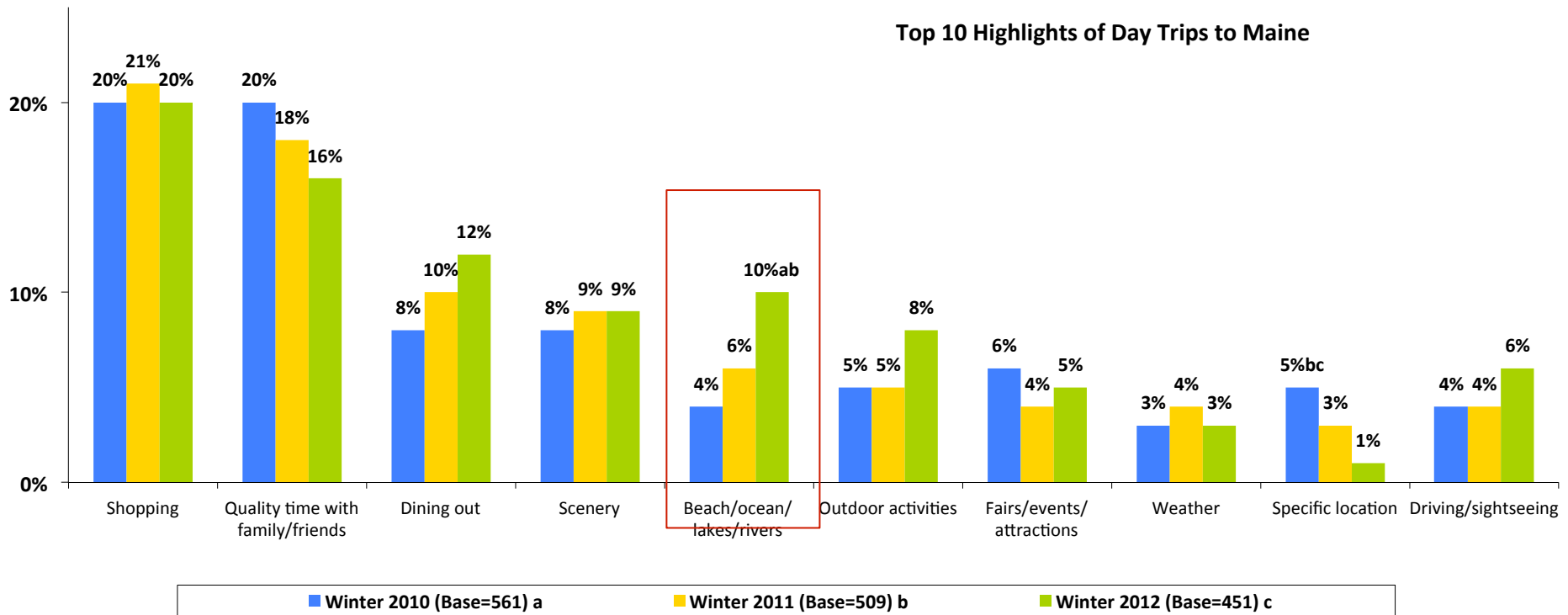
Highlight of Overnight Trip to Maine

- *Quality time with family/friends* continues to be the most frequently cited highlight of overnight travelers' trips to Maine.
- *Relaxation* is noted more frequently as a highlight than in prior years.



Highlight of Day Trip to Maine

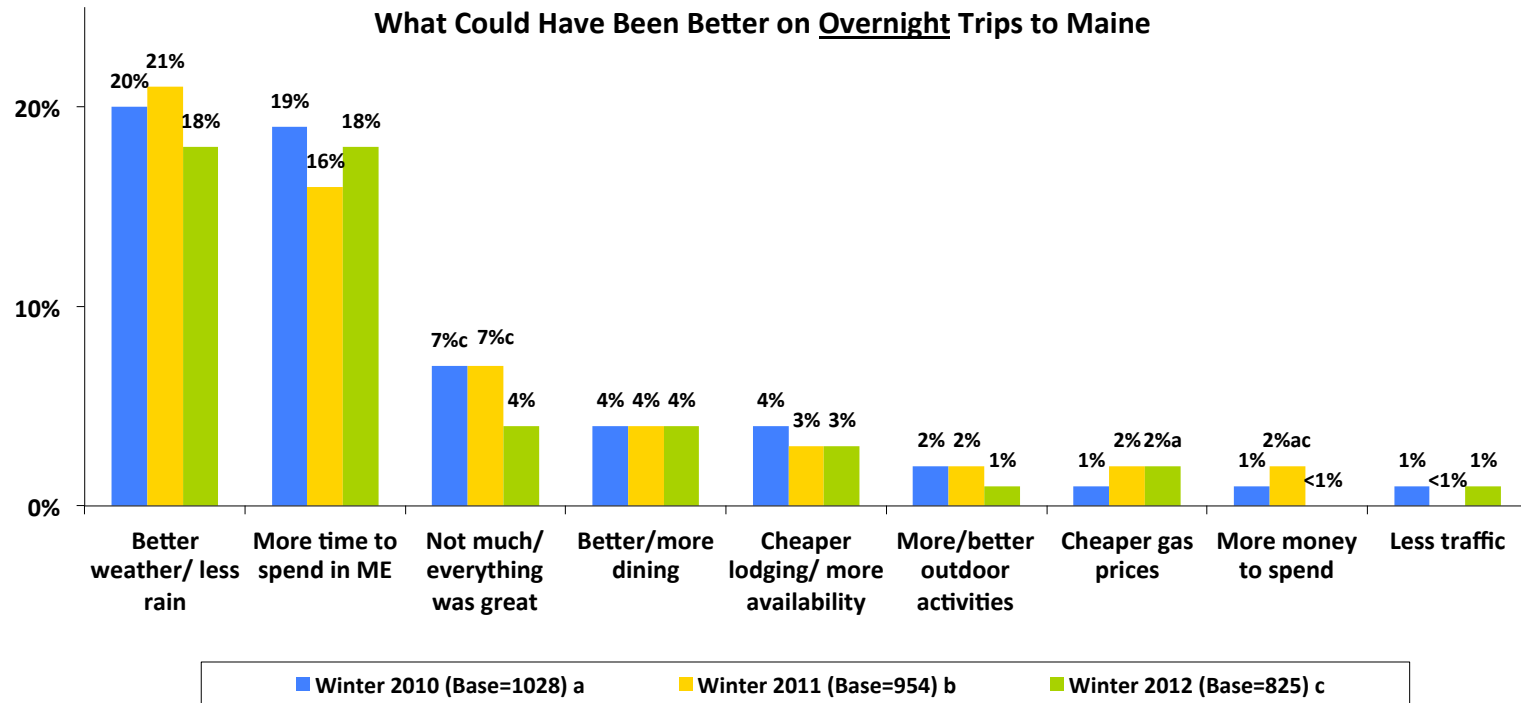
- *Shopping and spending quality time with friends* are most often cited as a highlight of a day trip to Maine.
- Notably, Maine's water features including beaches, lakes, and rivers were significantly more likely to be mentioned as a highlight compared to prior years. This could be linked to milder temperatures, particularly in early spring.



*a, b, c indicates significant difference at the 95% confidence level
Day Q16. What was the highlight of your day trip in Maine?*

Aspects of Overnight Trips that Could Have Been Better

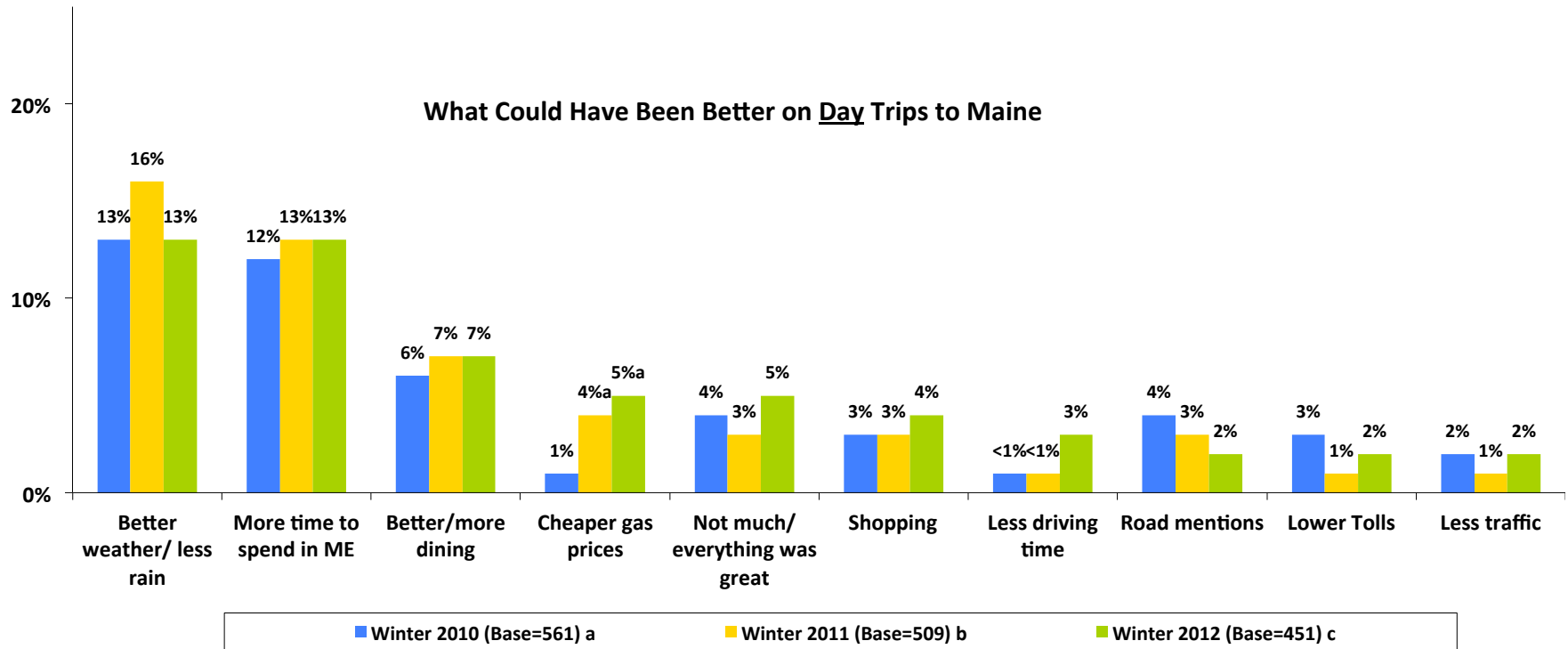
- Improved weather, and more time to spend in the state were most commonly cited items that could be improved on an overnight trip to Maine.



a, b, c indicates significant difference at the 95% confidence level
 Regional Q36. What do you wish could have been better on this trip in Maine?

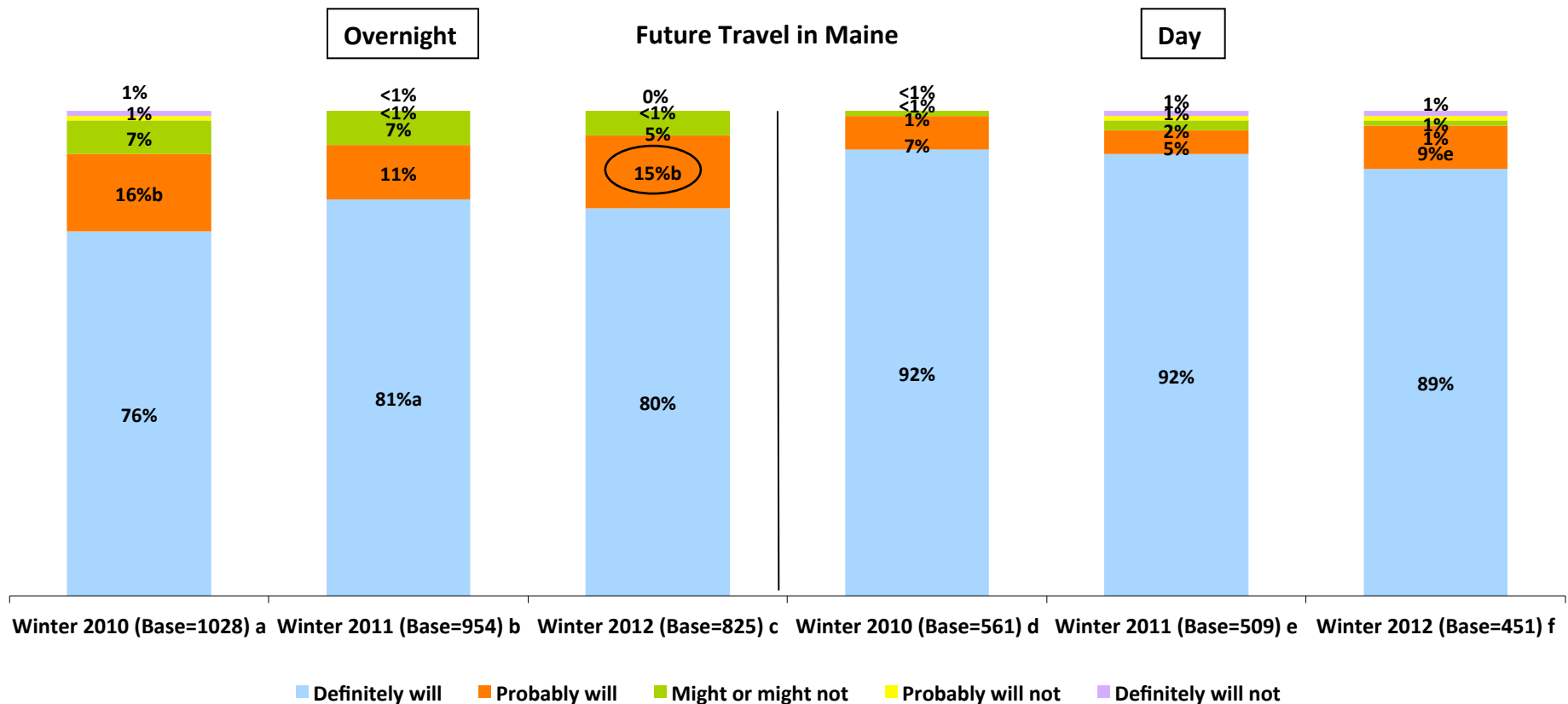
Aspects of Day Trips that Could Have Been Better

- As with overnight, the most commonly mentioned items that could be improved are the *weather* and having *more time to spend in Maine*.
- Not surprisingly given the spike in prices during the spring, visitors wishing for cheaper gas prices remained a more common complaint compared to winter 2010.



Future Travel in Maine

- Future Maine travel intentions continue to be strong among both overnight visitors and day visitors to the state, with 95% of overnight visitors reporting that they *definitely/probably will* return to Maine in the future. Nearly all day visitors report this as well.



a, b, c, d, e, f indicates significant difference at the 95% confidence level
 Regional Q37, Day Q19. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

Future Region Visits

- The Maine Beaches and Greater Portland area continue to be the most commonly cited future destination for travel in Maine for both overnight and day visitors.
- Significantly fewer overnight visitors plan to visit the Kennebec and Moose River Valley and the Aroostook County regions versus winter 2011 overnight travelers.

| Total Travelers Likely to Take Maine Trip in Future | Overnight Visitors | | | Day Visitors | | |
|-----------------------------------------------------|-------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| | Winter 2010 (n=1011) | Winter 2011 (n=947) | Winter 2012 (n=822) | Winter 2010 (n=559) | Winter 2011 (n=501) | Winter 2012 (n=448) |
| | a % | b % | c % | d % | e % | f % |
| The Maine Beaches | 64% | 67% | 67% | 80% | 76% | 77% |
| Greater Portland and Casco Bay | 62% | 63% | 61% | 70% | 70% | 69% |
| Downeast and Acadia | 52% | 53% | 53% | 53% | 52% | 56% |
| Midcoast | 50% | 52% | 51% | 57% | 53% | 53% |
| Maine Lakes and Mountains | 42% | 45% | 42% | 47% | 43% | 48% |
| The Maine Highlands | 45% | 46% | 42% | 39% | 41% | 43% |
| Kennebec and Moose River Valley | 41%^c | 39%^c | 33% | 40% | 42% | 45% |
| Aroostook County | 26% | 29%^c | 24% | 20% | 20% | 25% |

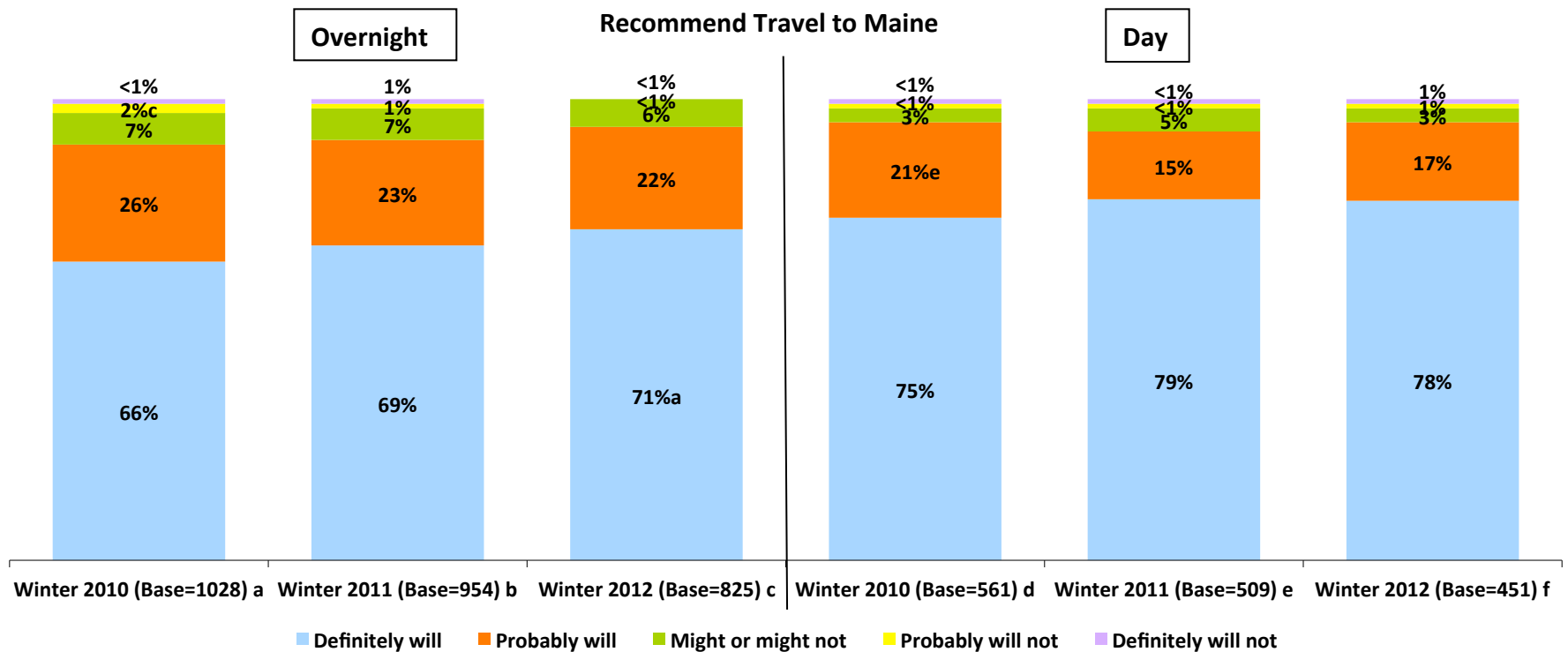
a, b, c / d, e, f indicate significant difference at the 95% confidence level

Regional Q37a. How likely will you be to take a trip to any of the following regions of Maine in the future?

Day Q19a. How likely will you be to take a day trip to any of the following regions of Maine in the future?

Recommendation of Maine as a Travel Destination

- Recommendation of Maine remains high among visitors, with the vast majority reporting that they *definitely/probably* recommend Maine to a friend or relative.



a, b, c, d, e, f notes significant difference at the 95% confidence level
 Regional Q38, Day Q19b. How likely will you be to recommend Maine as a vacation/travel destination to friends or relatives?

Future Region Recommendations

- Recommendation of the Maine beaches to family and friends remains consistent versus last year among all travelers.
- Interestingly, recommendations to explore the Greater Portland and Casco Bay region has decreased significantly among overnight visitors, but has increased significantly among day visitors.
- Recommendations to visit Maine Lakes and Mountains and The Maine Highlands has also increased among day visitors.

| Total Travelers Likely to Recommend Maine | Overnight Visitors | | | Day Visitors | | |
|-------------------------------------------|-----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| | Winter 2010 (n=1006) a % | Winter 2011 (n=943) b % | Winter 2012 (n=824) c % | Winter 2010 (n=558) d % | Winter 2011 (n=506) e % | Winter 2012 (n=445) f % |
| The Maine Beaches | 66% | 72%^a | 69% | 76% | 79% | 80% |
| Greater Portland and Casco Bay | 68%^c | 70%^c | 62% | 69% | 75%^d | 80%^d |
| Downeast and Acadia | 60% | 60% | 61% | 69% | 72% | 73% |
| Midcoast | 60% | 60% | 61% | 64% | 69% | 66% |
| Maine Lakes and Mountains | 50% | 52% | 50% | 53% | 60%^d | 63%^d |
| The Maine Highlands | 50% | 52% | 48% | 50% | 59%^d | 60%^d |
| Kennebec and Moose River Valley | 43% | 45% | 41% | 47% | 48% | 54%^d |
| Aroostook County | 37% | 37% | 33% | 36% | 38% | 41% |

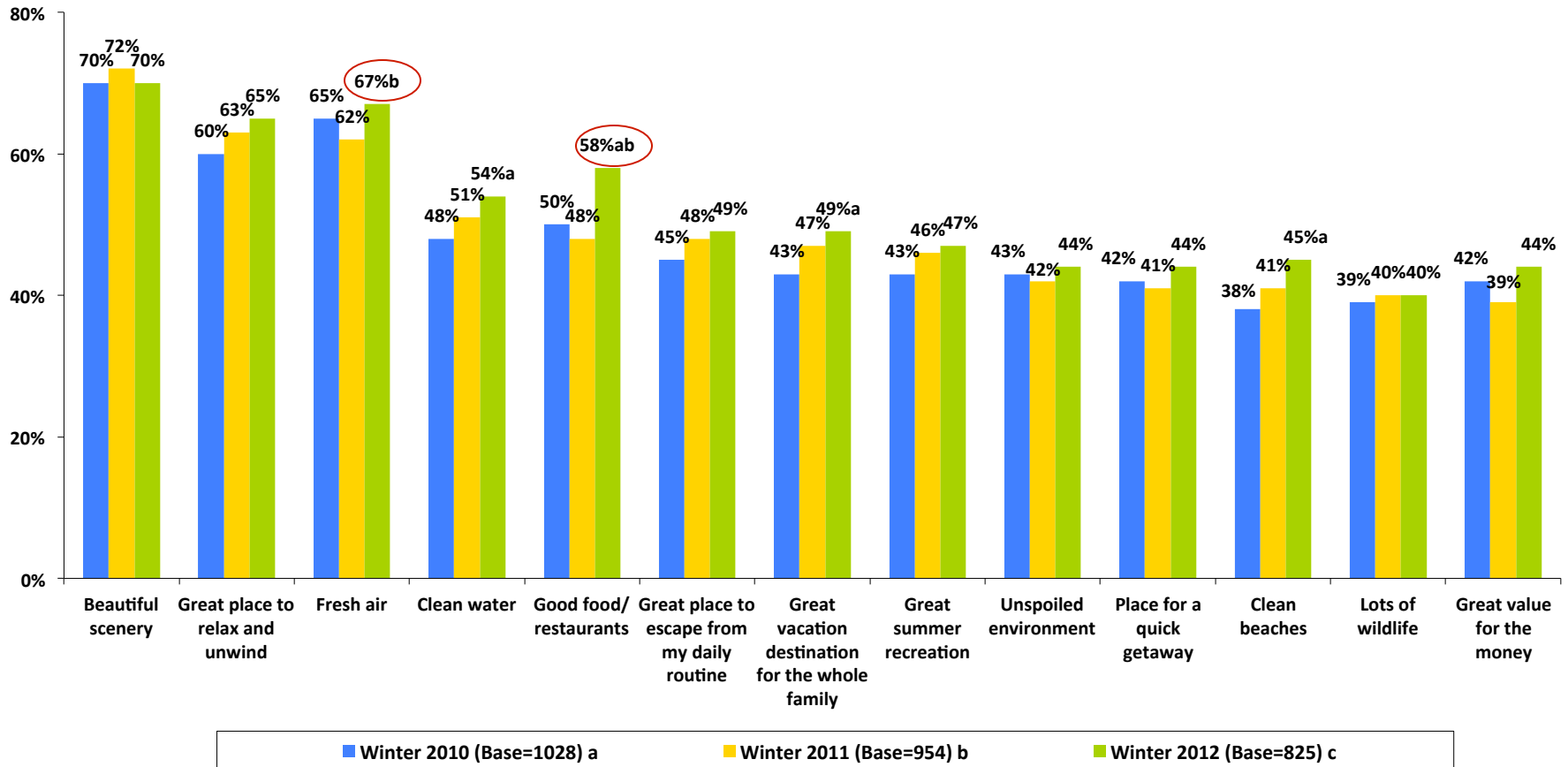
a, b, c / d, e, f indicate significant difference at the 95% confidence level

Regional Q38a. How likely will you be to recommend any of the following Maine regions to friends or relatives?

Day Q19c. How likely will you be to recommend any of the following Maine regions to friends or relatives?

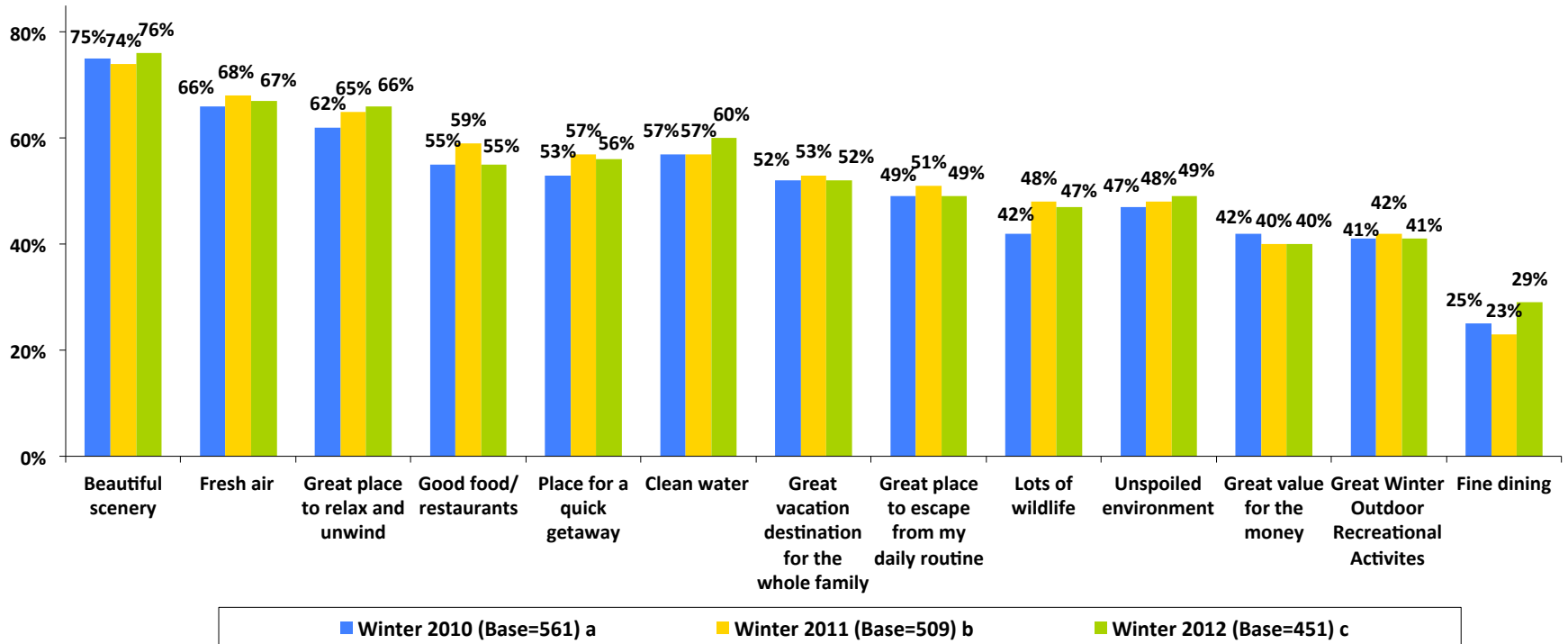
Descriptions of Maine – Overnight Visitors

- Descriptors of Maine remained relatively consistent with prior years except for *fresh air* and *good food/restaurants* which both showed significant increases compared to last year.



Descriptions of Maine – Day Visitors

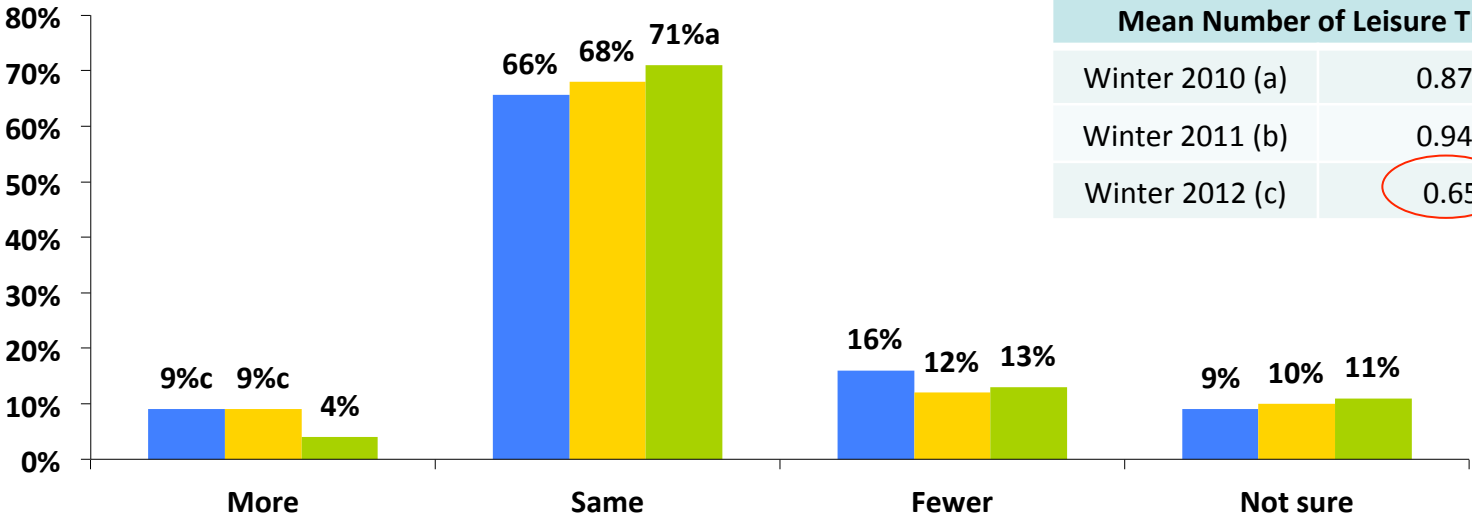
- *Beautiful scenery, fresh air, and a great place to relax and unwind* continue to be the most used descriptors of Maine by day visitors. Overall, year-over-year ratings remain consistent.



Future Overnight Leisure Travel Intentions

- Although fewer travelers mention planning to travel *more* compared to previous years, the vast majority report planning to travel the same number of trips within the next month.
- Notably, the average number of planned leisure trips has significantly decreased for winter 2012 compared to both 2010 and 2011.

Planned Leisure Trips in Next Month

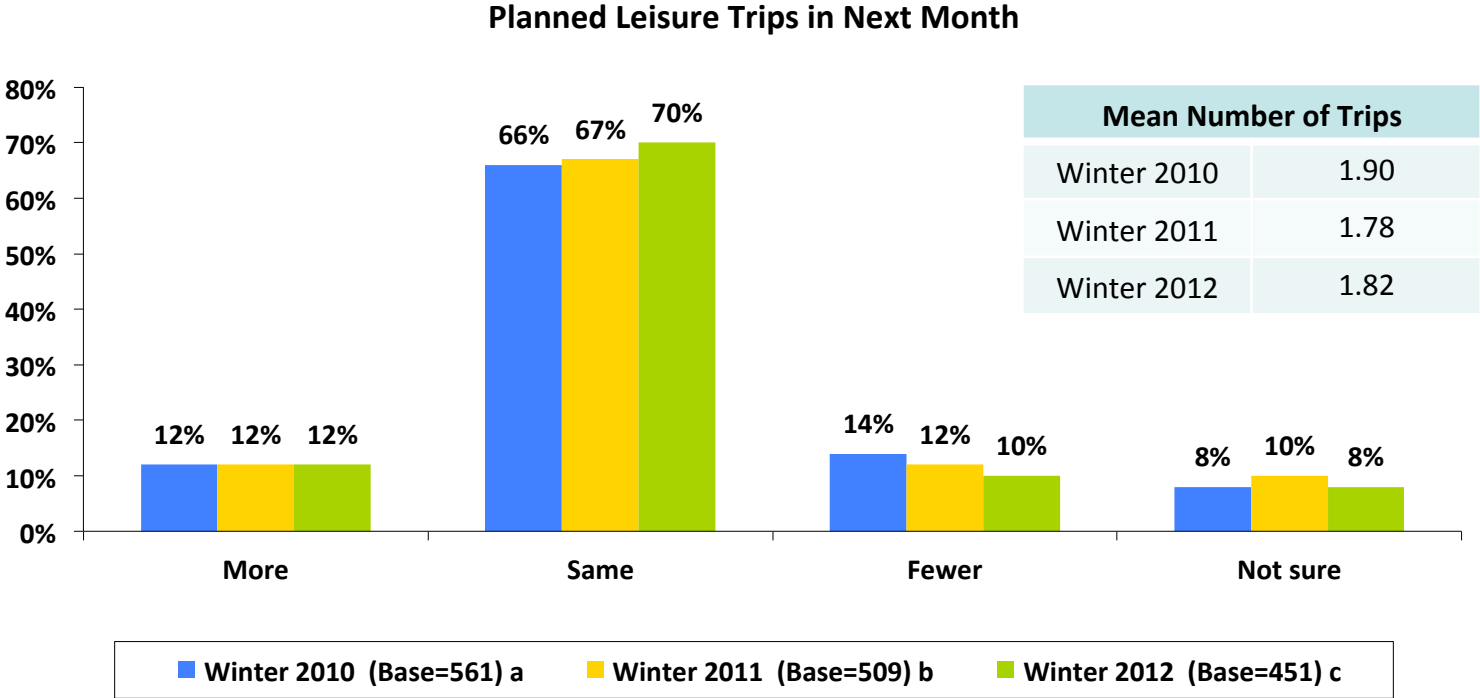


| Mean Number of Leisure Trips | |
|------------------------------|-------|
| Winter 2010 (a) | 0.87c |
| Winter 2011 (b) | 0.94c |
| Winter 2012 (c) | 0.65 |

■ Winter 2010 (Base=1028) a
 ■ Winter 2011 (Base=954) b
 ■ Winter 2012 (Base=825) c

Future Day Leisure Travel Intentions

- Future day travel intentions have remained consistent over the past three winter seasons.



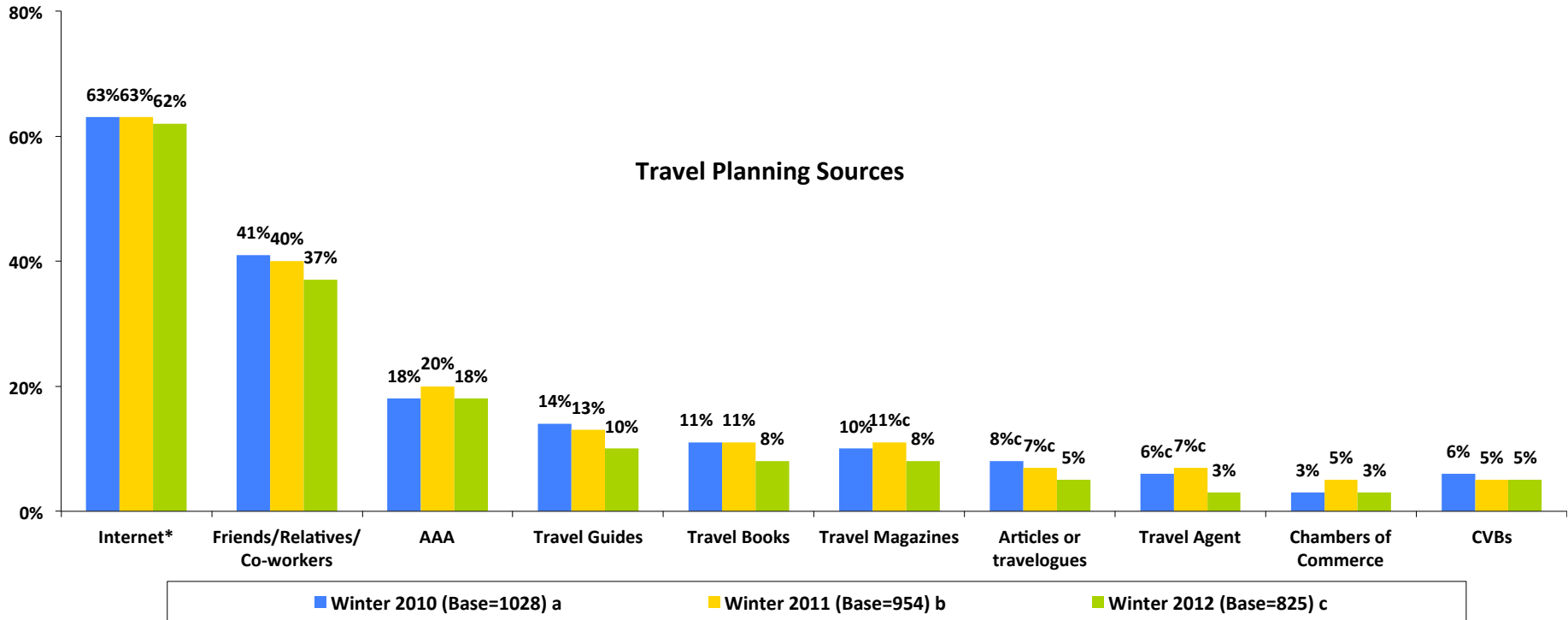
a, b, c notes significant difference at the 95% confidence level
 Q23_5. In the next month, how many trips do you plan to take anywhere for business, leisure, or to visit friends or relatives?
 Q23_6. Is this more, the same, or fewer than the number of business trips you took during this same period last year?

Maine Overnight Visitor Winter Trip Planning



Travel Planning Sources

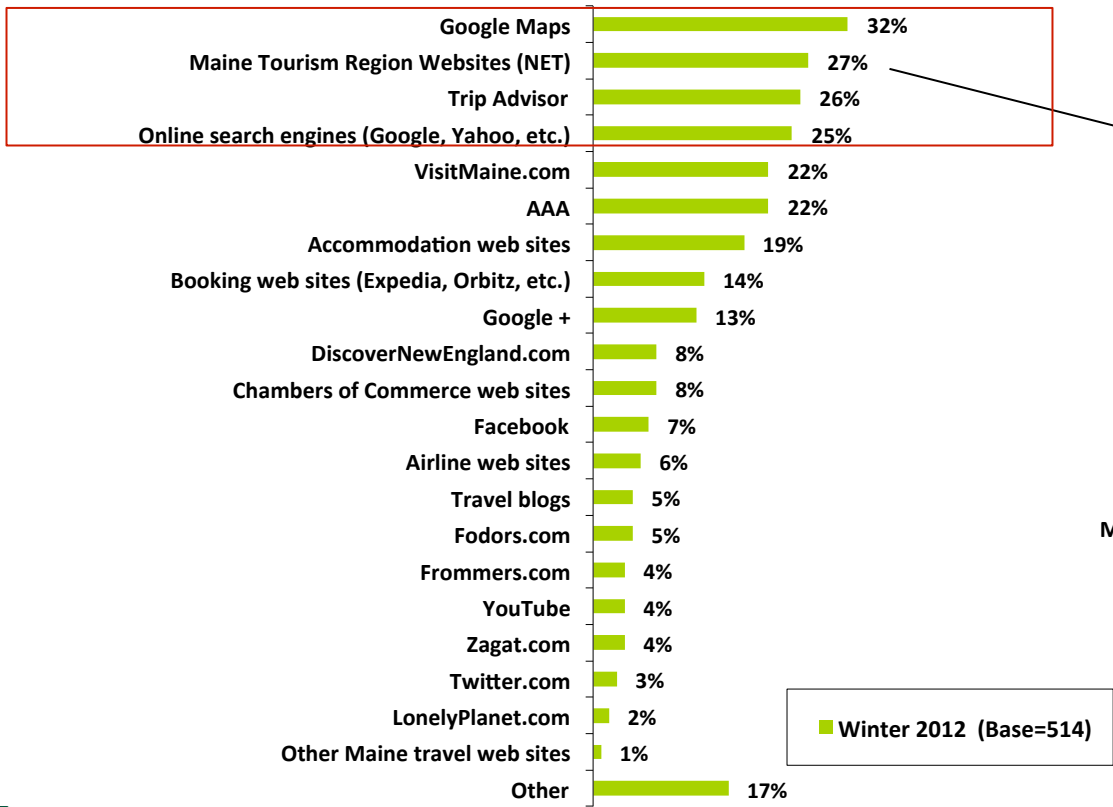
- As with previous years, the *Internet* continues to be the most widely used planning source for overnight visitors to Maine, followed by *friends/relatives/co-workers* and, to a lesser extent, *AAA*.



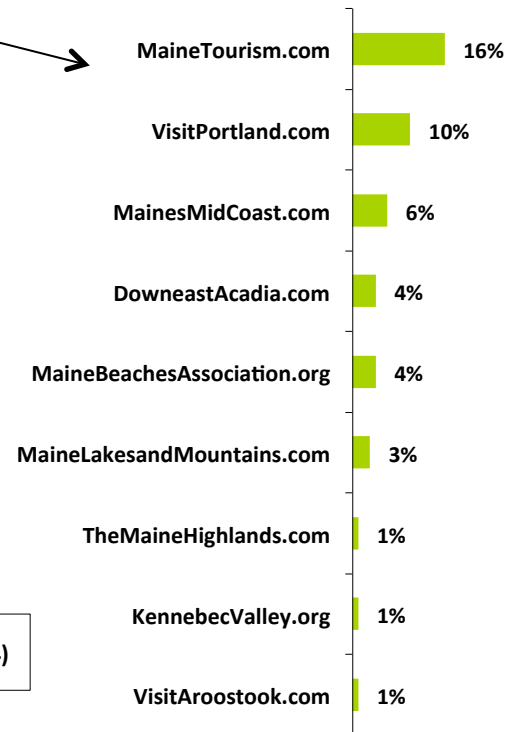
Online Travel Planning

- When doing online travel planning, finding the way is important among travelers, as Google Maps is the most frequently cited resource.
- Also popular are Maine Tourism Region Websites, consumer reviews and opinions from Trip Advisor, as well as general use of online search engines.

Websites Visited
(Base=Those who used Internet to plan trip)



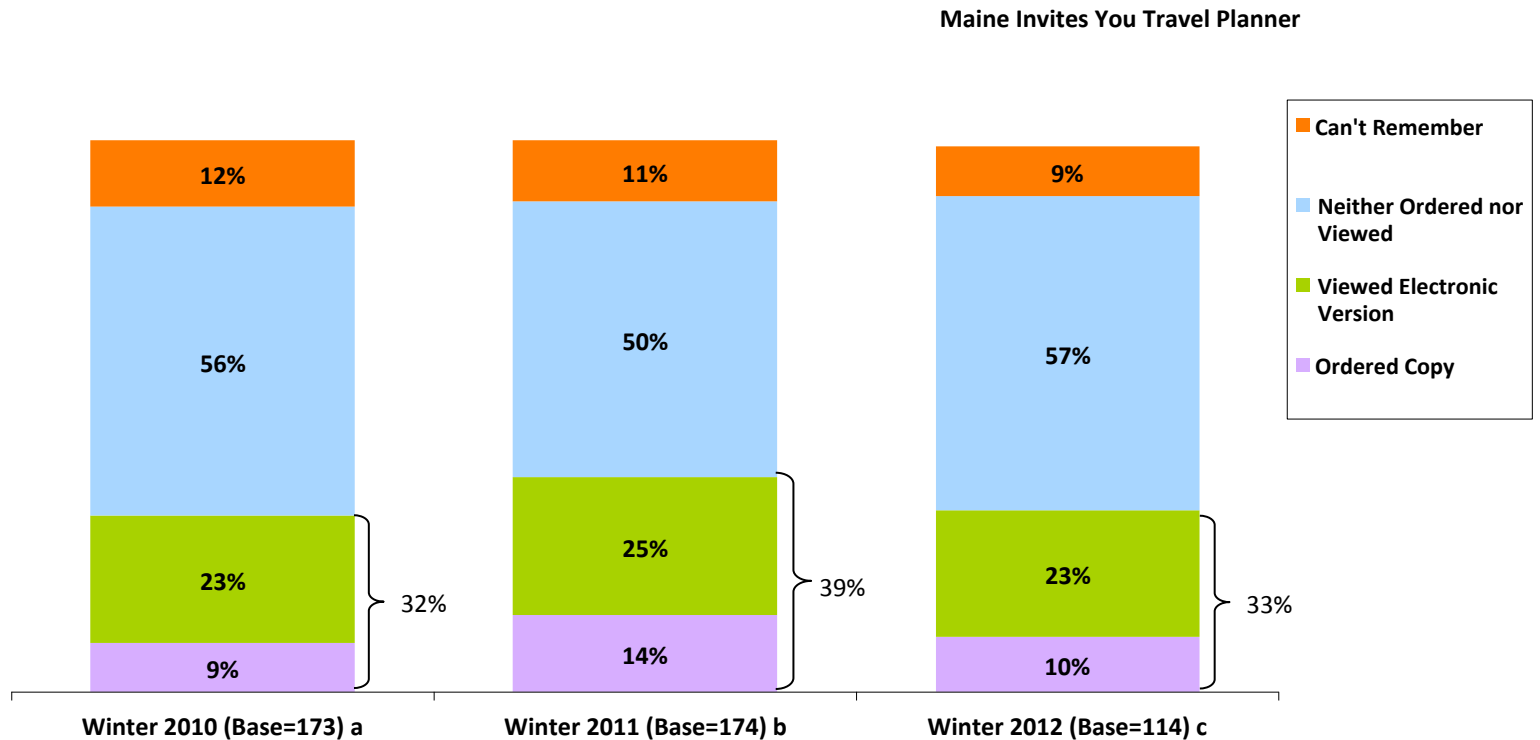
Maine Tourism Region Websites



a, b, c indicate significant difference at the 95% confidence level
 Regional Q18. Which of the following websites did you visit when planning this trip in Maine? (Please check all that apply)
 Question options changed in 2012/2012

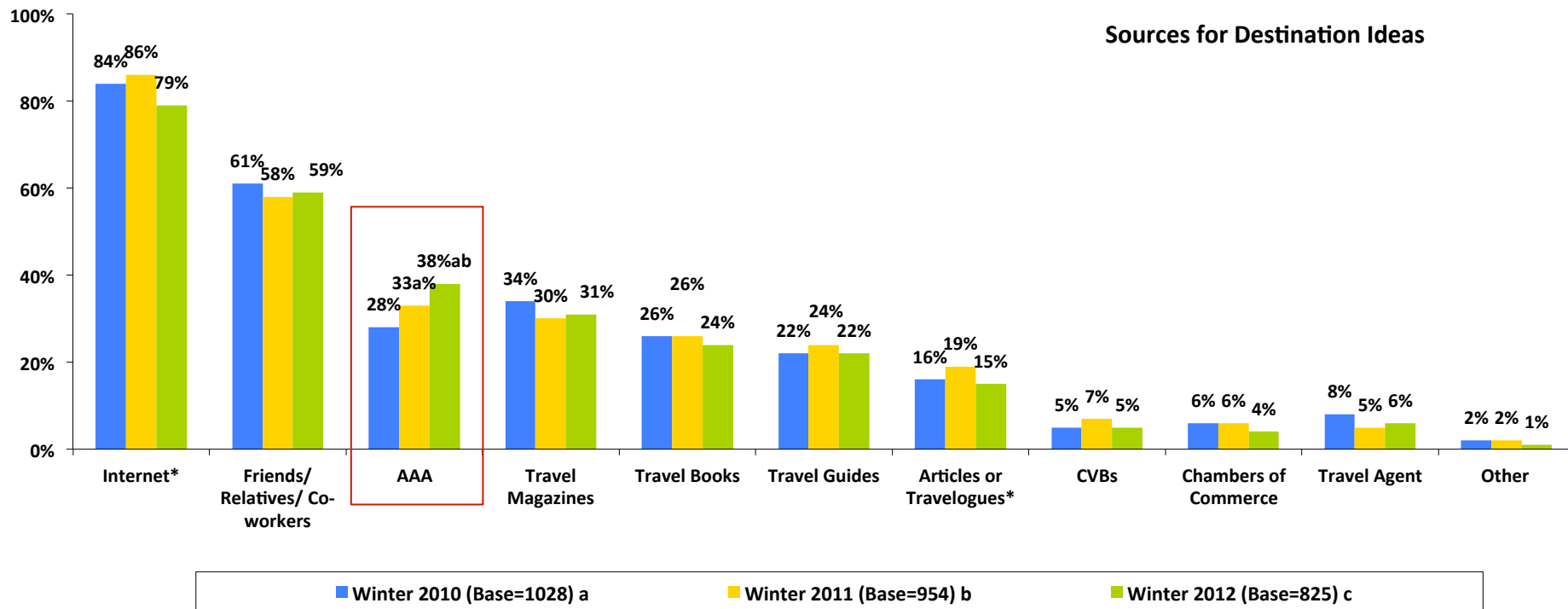
Maine Invites You Travel Planner

- The percentage of VisitMaine.com site visitors who either ordered or viewed the electronic version of *Maine Invites You* remained stable with prior years.



General Travel Planning Sources – Initial Ideas for Destinations

- Internet and word of mouth remain the most prevalent sources of information for Maine travel ideas in winter 2012. Usage of AAA continues to increase in popularity with overnight travelers.



a,b,c notes significant difference at 95% confidence level.

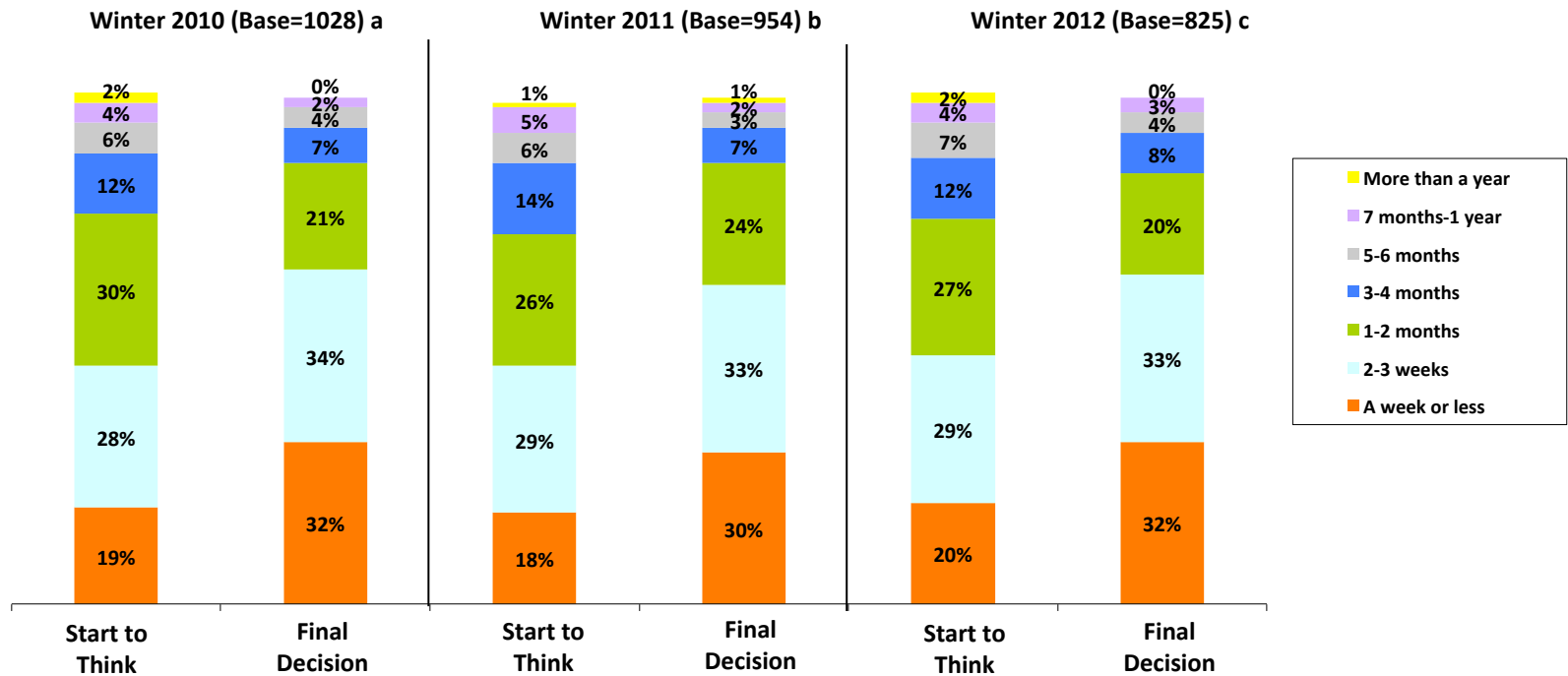
Regional Q42. When are planning a vacation or leisure trip, where do you typically get ideas for different places to visit? (Please check all that apply.)

*Note: Online data collection method used

Planning Time Frame – Overnight Visitors

- The time frame in which travelers are starting to think about and decide on their trip remains consistent with prior winter seasons – two-thirds are making their final decisions within three weeks of travel.

Decision-Making Time Frame

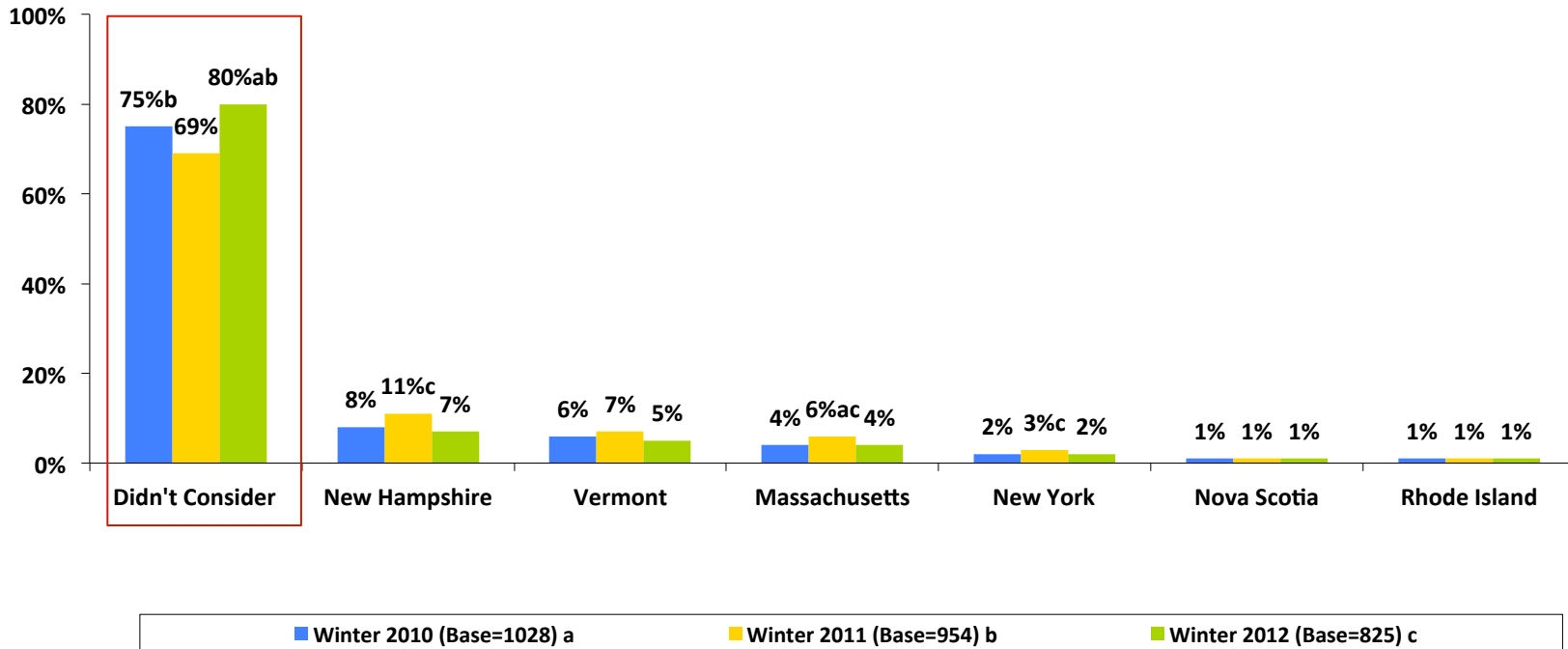


a,b,c indicates significant difference at the 95% confidence level
 Regional Q12. When you were planning this most recent overnight trip in Maine, when did you first start thinking about it?
 Regional Q13. When did you finally decide to take this specific trip in Maine?

Other Destinations Considered – Overnight Visitors

- Eight-in-ten overnight visitors to visit Maine during winter 2012 did not consider any destination aside from Maine, representing a significant increase compared to winter 2010 and 2011.

Other Destinations Considered



a,b,c indicates significant difference at the 95% confidence level.

Regional Q15. What other states or provinces, if any, did you consider for this specific trip?

First Time Versus Repeat Visitors



Overnight First Time Visitor Demographics

- Similar to 2011, overnight first time visitors in 2012 are younger than repeat visitors. However both groups are older this year than in the prior year.
- First time visits from Canadian residents have increased significantly compared to 2011, particularly among those who reside in Ontario.

| Overnight Visitors | | | | |
|--------------------|------------------------------------|--------------------------------|-----------------------------------|--------------------------------|
| | First Time 2011 (Base=140) a | Repeat 2011 (Base=814) b | First Time 2012 (Base=88) c | Repeat 2012 (Base=737) d |
| Mean Age | 33.1 | 44.3 | 37.0 | 48.1b |
| < 35 | 57% | 34%d | 58% | 24% |
| 35 - 44 | 27%c | 16% | 12% | 16% |
| 45 - 54 | 13% | 21% | 15% | 21% |
| 55 + | 1% | 29% | 14%a | 38%b |
| Residence | | | | |
| New York | 39% | 16% | 27% | 15% |
| New Jersey | 20%c | 5% | 8% | 5% |
| Pennsylvania | 12% | 5% | 11% | 6% |
| Canada (NET) | 7% | 15% | 25%a | 14% |
| Ontario | 7% | 4% | 22%a | 5% |
| Maryland | 5% | 3% | 4% | 2% |
| Massachusetts | 5% | 27% | 11% | 27% |
| Connecticut | 4% | 6% | 1% | 7% |
| Washington D.C. | 3% | 2% | 4% | - |
| Delaware | 1% | 2%d | - | <1% |
| New Hampshire | 1% | 5% | 1% | 5% |
| Rhode Island | 1% | 2% | 4% | 3% |
| Maine | 1% | 10% | - | 12% |
| Vermont | - | 2% | 3% | 3% |
| New Brunswick | - | 8% | - | 8% |
| Quebec | - | 2%d | 3% | 1% |
| Nova Scotia | - | 0% | - | 0% |

Overnight First Time Visitation by Region

- Repeat overnight visitors were more likely to visit the Maine beaches and less likely to visit Aroostook County this winter versus winter 2011.

| | Overnight Visitors | | | |
|-------------------------------|------------------------------------|--------------------------------|-----------------------------------|--------------------------------|
| | First Time 2011 (Base=140) a | Repeat 2011 (Base=814) b | First Time 2012 (Base=88) c | Repeat 2012 (Base=737) d |
| The Maine Beaches | 14% | 20% | 15% | 26% ^b |
| Greater Portland & Casco Bay | 5% | 21% | 12% | 20% |
| The Maine Highlands | 18% | 13% | 11% | 11% |
| Downeast & Acadia | 23% | 11% | 20% | 11% |
| Mid-Coast | 7% | 12% | 12% | 13% |
| Maine Lakes and Mountains | 19% | 11% | 15% | 10% |
| Kennebec & Moose River Valley | 5% | 6% | 10% | 5% |
| Aroostook County | 9% | 4% ^d | 3% | 2% |

Day First Time Visitor Demographics

- Similar to overnight visitors, repeat day visitors tended to skew a bit older compared to last year.

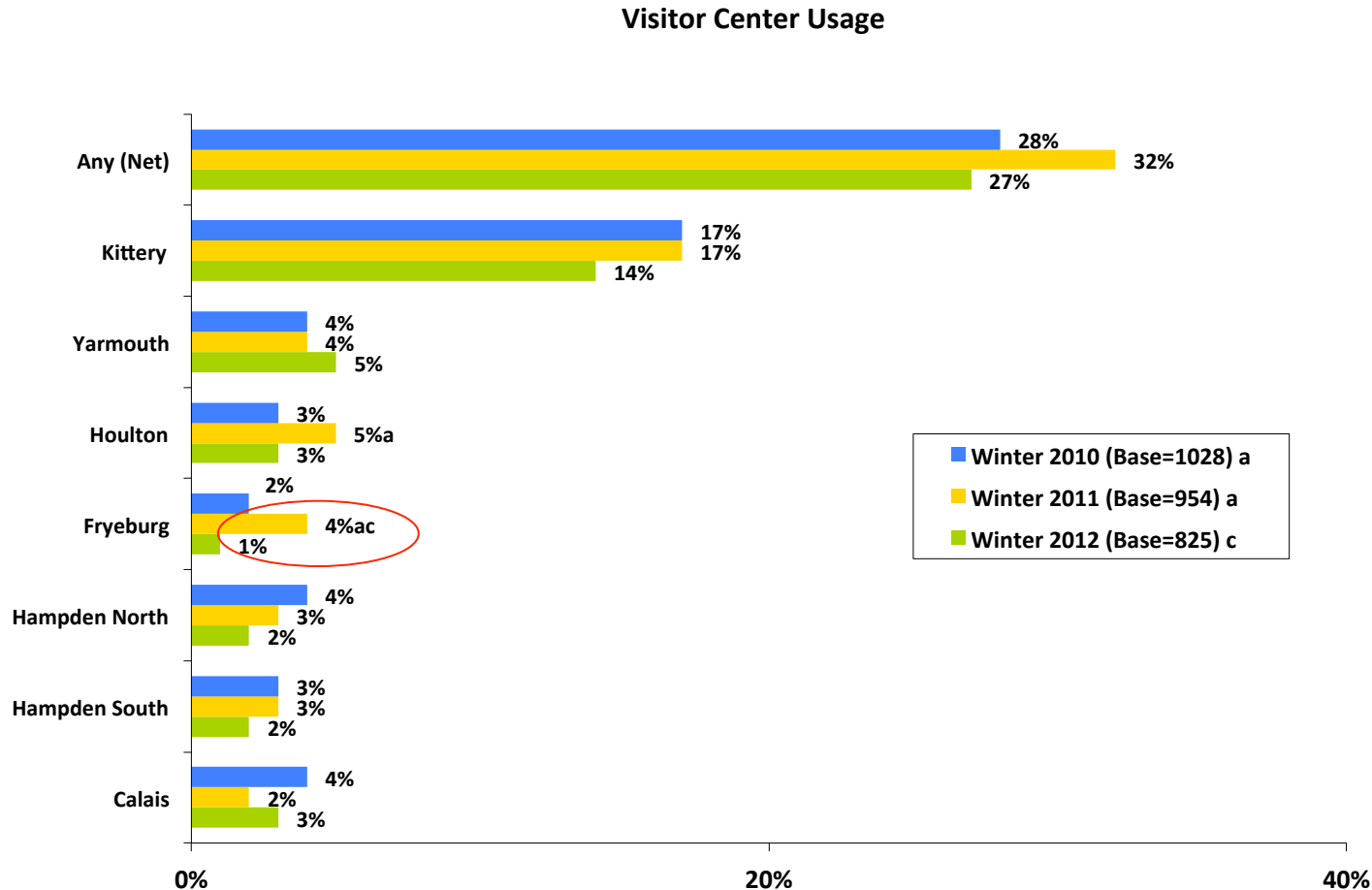
| Day Visitors | | | | |
|---------------|------------------------------------|--------------------------------|------------------------------------|--------------------------------|
| | First Time 2011 (Base=16*) a | Repeat 2011 (Base=493) b | First Time 2012 (Base=11*) c | Repeat 2012 (Base=440) d |
| Mean Age | 38.4 | 48.4 | 41.6 | 50.8b |
| < 35 | 31% | 22% | 47% | 18% |
| 35 - 44 | 34% | 17% | 10% | 16% |
| 45 - 54 | 28% | 22% | 36% | 20% |
| 55 + | 7% | 39% | 7% | 46%b |
| Residence | | | | |
| Maine | 22% | 42% | 13% | 42% |
| Massachusetts | 65% | 32% | 57% | 33% |
| New Hampshire | 11% | 12% | 16% | 14% |
| New Brunswick | 3% | 9% | - | 7% |
| Quebec | - | 1% | 14% | 2% |
| Rhode Island | - | 2% | - | 1% |
| Vermont | - | 1% | - | 1% |
| Nova Scotia | - | 0% | - | 0% |

Visitor Centers



Maine Visitor Center Usage – Overnight Visitors

- Among overnight visitors, there was a significant decrease in stops at the Fryeburg Visitor Center. The remaining centers have similar levels of visitation in winter 2012 compared to winter 2011.



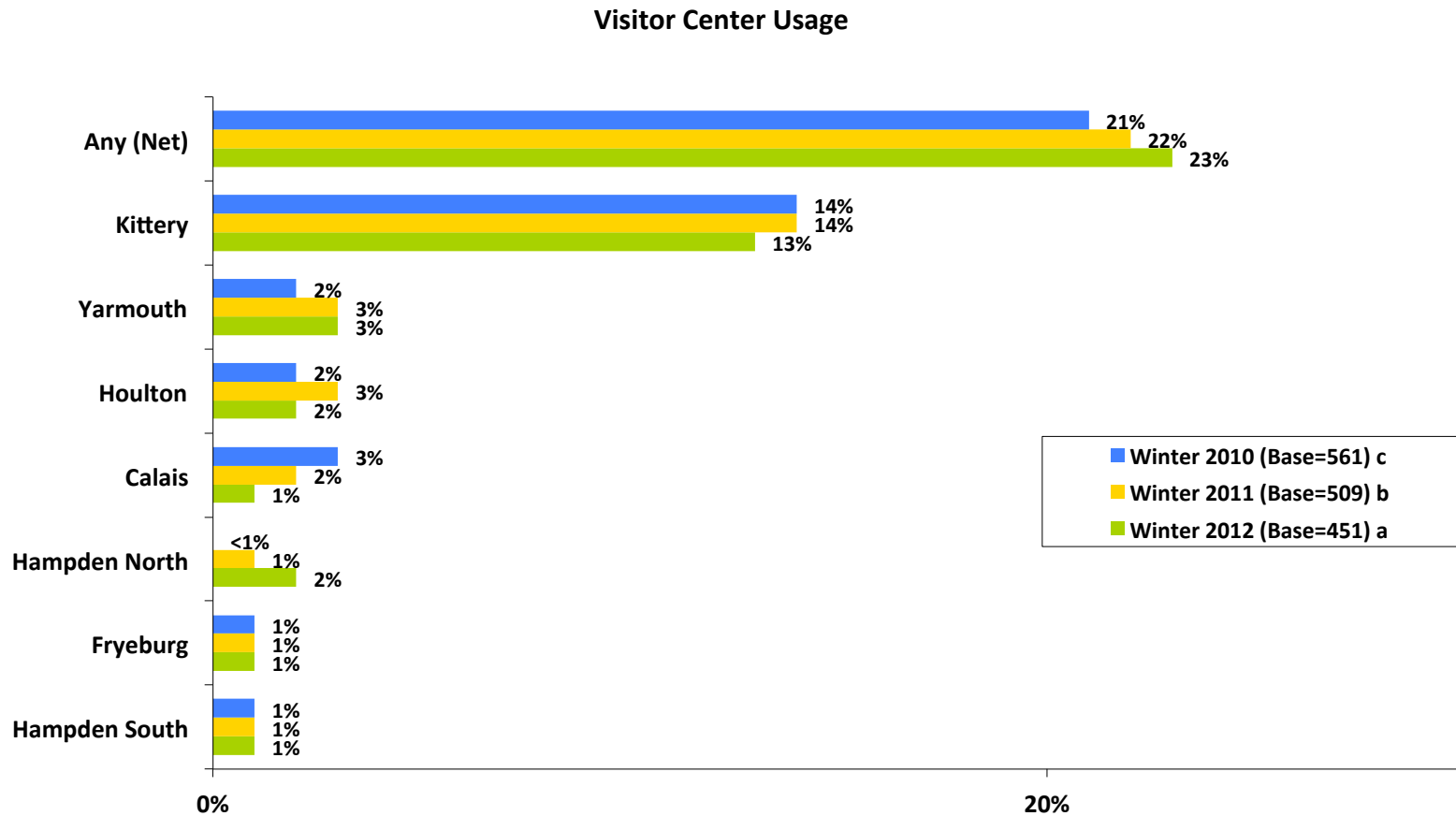
a,b,c indicates significant difference at the 95% confidence level

Regional Q31a. Once you arrived in Maine did you stop in at any of the Maine Visitor Centers? Please select all Visitor Centers you stopped into below.

Note: Question added in 2010.

Maine Visitor Center Usage – Day Visitors

- There were no significant year-to-year differences in the percentage of day visitors who went to any of the Maine Visitor Centers during winter 2012 as compared to winter 2011 and 2010.



a,b indicates significant difference at the 95% confidence level

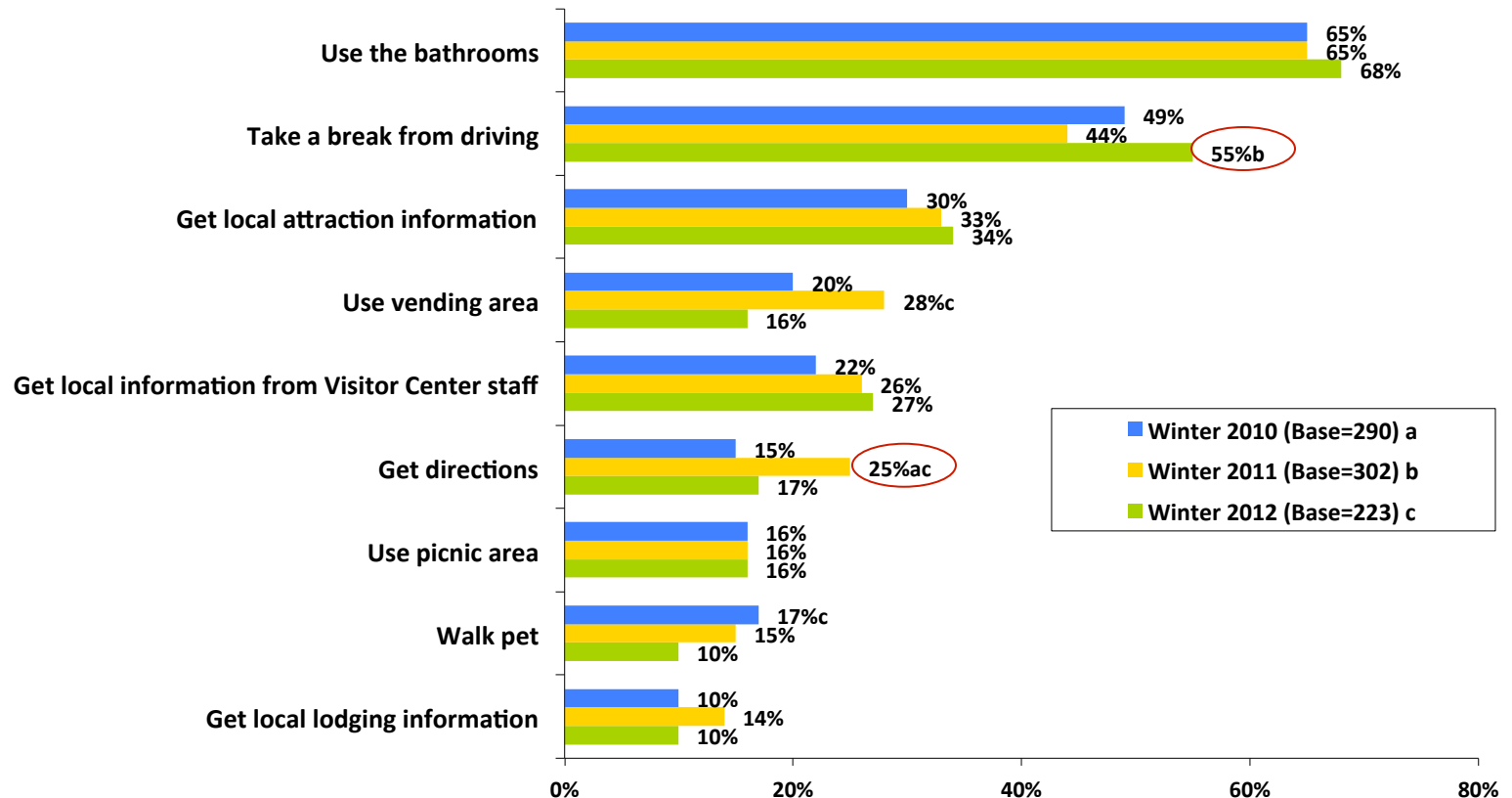
Day Q12a. Once you arrived in Maine did you stop in at any of the Maine Visitor Centers? Please select all Visitor Centers you stopped into below.

Note: Question added in 2010.

Maine Visitor Center Usage – Overnight Visitors

- Use of the restroom remains the most common activity at the visitor centers, followed by taking a break from driving, which increased significantly versus winter 2011. Visitor Center users were less likely to need directions than in winter 2011.

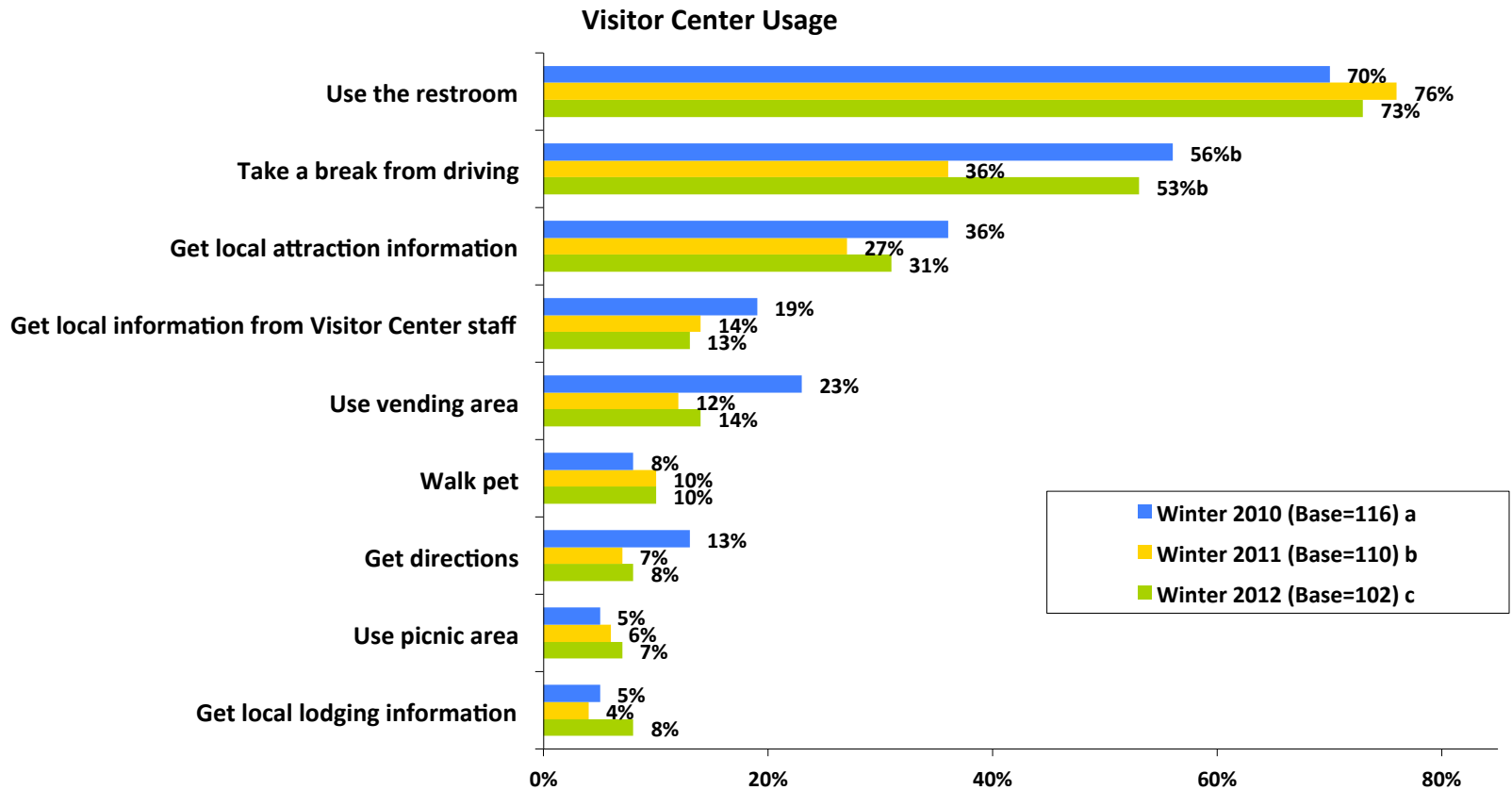
Visitor Center Usage



a,b,c indicates significant difference at the 95% confidence level
 Regional Q31b. What did you utilize the Maine Visitor Center(s) for during your visit?

Maine Visitor Center Usage – Day Visitors

- For day visitors, use of the restroom remains the most common practice at visitor centers.
- Taking a break from driving increased significantly versus winter 2011 returning to levels seen in winter 2010.



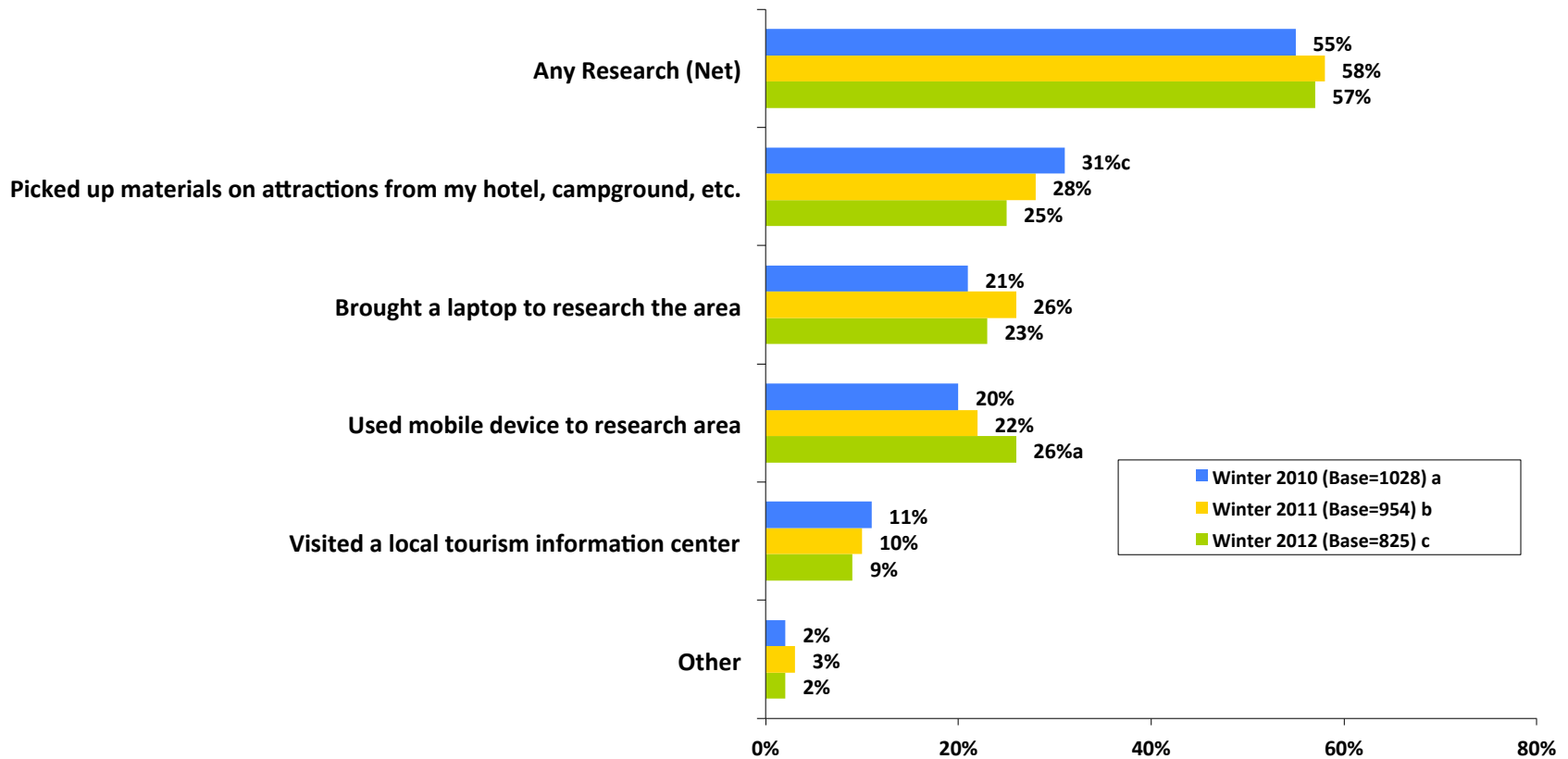
a,b indicates significant difference at the 95% confidence level

Day Q12b. What did you utilize the Maine Visitor Center(s) for during your visit?

Note: Question added in 2010.

Research While In Maine – Overnight Visitors

- Slightly over half of overnight visitors report researching places and activities once arriving in Maine. Not surprising, usage of a mobile device continues to increase in popularity when researching these activities.



a,b,c indicates significant difference at the 95% confidence level

Regional Q31d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?

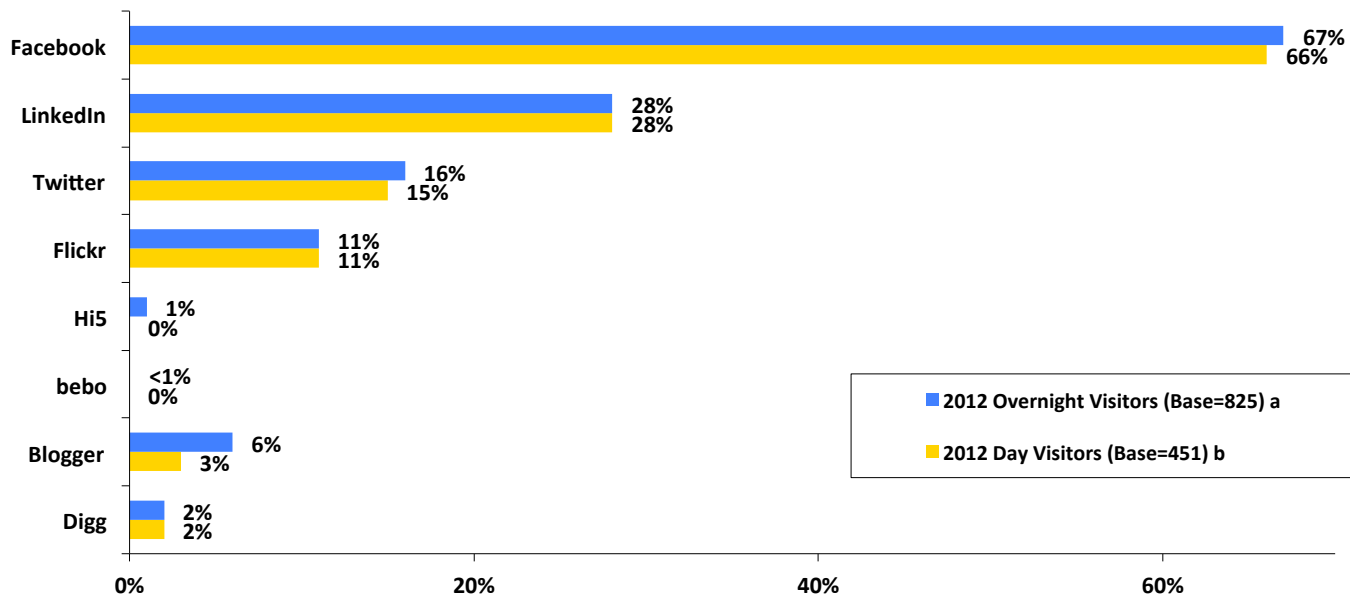
Search Engines & Social Networking



Social Networking Site Usage – Maine Visitors

- Reflecting the national trends, Facebook continues to be the most widely used social networking site among visitors to Maine during winter 2012. While not as frequently used by visitors, LinkedIn and Twitter were also noted.

Social Networking Sites Used on a Regular Basis



a,b indicates significant difference at the 95% confidence level

Regional Q51a, Day Q27a. Which of the following Internet, blogging, or social networking services do you use on a regular basis?

Conclusions



Conclusions

- **Despite economic softness and deterrent weather conditions, visitation to Maine remained stable.** Overnight travel generally maintained visitation trends versus winter 2011, while day visitation for the season also remained steady. This is a positive sign, particularly given the uncertain national travel outlook. However, intended future travel is down, suggesting a competitive marketplace in upcoming seasons.
- **While visitation was solid, per trip spending was down, due to decreases in lodging and retail expenditures.** While Maine enjoyed a similar level of visitation to winter 2011, the makeup of those visitors was slightly different. Visitors were more likely to be older, and to have been to Maine in the past. They were less likely to engage in winter outdoor recreation activities, and overall took shorter trips. All of these factors point to slightly lower spending on accommodations and retail merchandise per trip than seen in winter 2011.
- **Top of mind descriptors paint a picture of a beautiful place to come to relax.** *Beautiful scenery, great place to relax and unwind, as well as fresh air* continue to be top of mind descriptors for Maine travelers. Positively, mentions of *good food/restaurants* increased significantly among overnight visitors. In fact, spending on food remained at prior levels, as visitors were more likely to enjoy a relaxing trip enjoying the beauty of Maine as well as the great food available.
- **First time visitation was a struggle.** It is a huge positive that despite unfavorable conditions for winter outdoor recreation in many areas of the state, Maine was still able to draw visitors. However, it will continue to be an important challenge to find ways to bring in younger, first-time visitors when the conditions are less than perfect.



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