

Maine Office of Tourism Visitor Tracking Research 2012 Calendar Year Annual Report

Prepared by



April 2013

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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 is designed to:
 - Profile Maine visitors in demographic terms as well as in their travel patterns;
 - Explore perceptions of Maine among visitors;
 - Understand why some travelers choose to visit Maine;
 - 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 *ResearchNow* national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - **Regional Travel Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **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 that is at least 50 miles from home 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

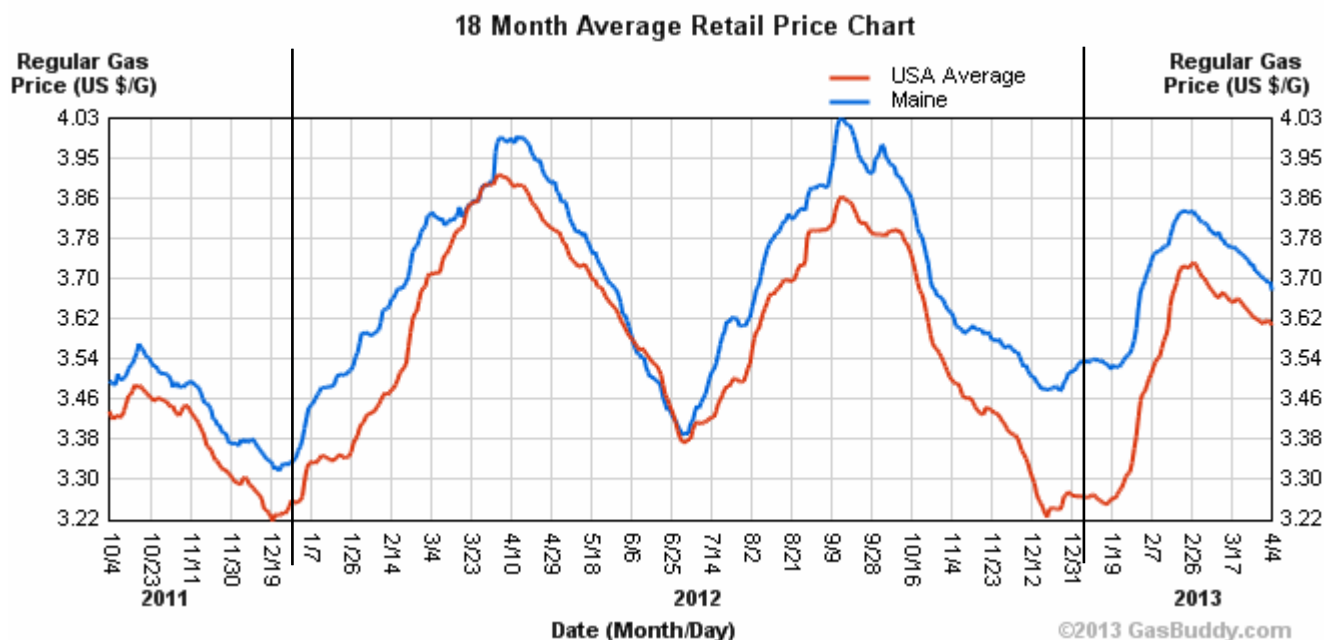
- This report outlines results from calendar year 2012, with travel occurring between January 2012 and December 2012.
- Data was collected between January 1st and December 15th 2012. The number of completed surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,497
 - Maine Day Visitor – 1,520
 - National Omnibus Survey – 17,722
- Throughout this report, the acronym VFR stands for “visiting friends or relatives.”

2012 in Context



Gas Prices

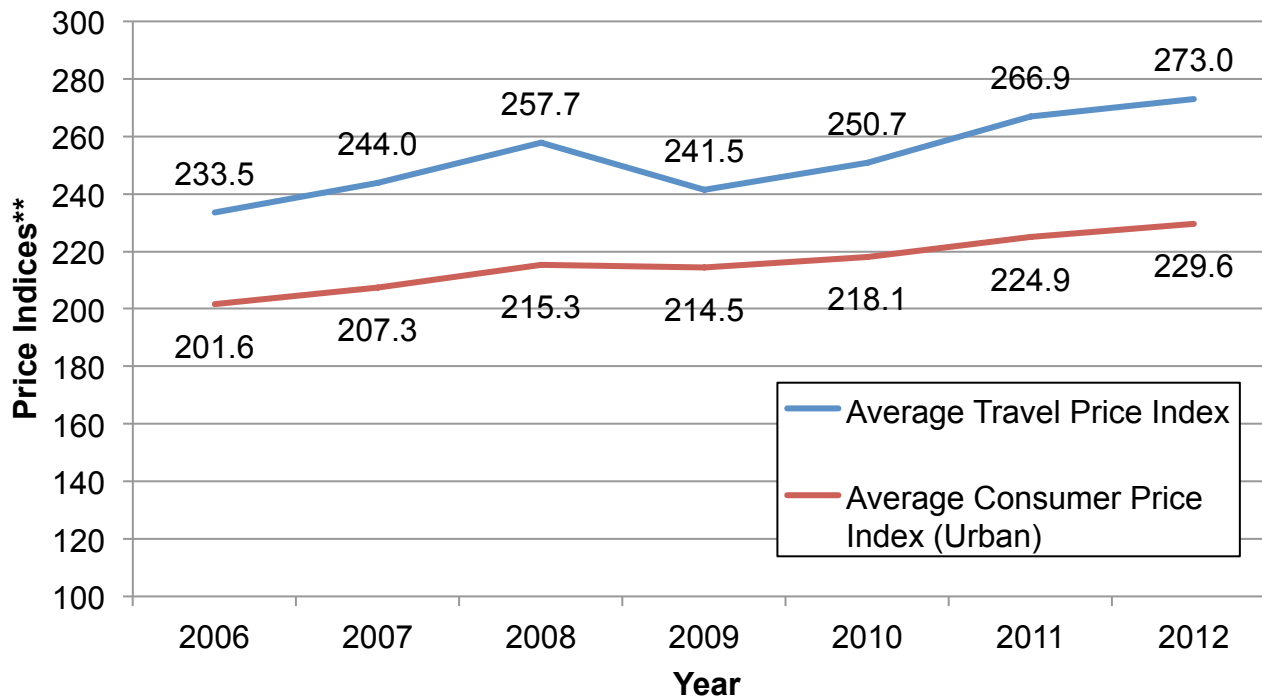
- 2012 began with the average price of gas steadily increasing, reaching a high in mid-April and then dropping as we headed into the busy summer travel season. Prices picked up soon again, however, rising through late summer and peaking at just over \$4.00 per gallon in September. Gas prices in Maine spent most of 2012 higher than the national average.
- Nationally, in 2013, gas prices are projected to peak in the summer and then fall slowly but steadily into the fall.



Travel Price Index

- After a slight stumble between 2008 and 2009, the Travel Price Index* returned to a pattern of consistent increases seen in yearly averages, and continues to exceed the Consumer Price Index. This presents a continued high cost of travel nationwide.
- The U.S. Travel Association projects that the Travel Price Index will continue to increase at a 3.0% rate for each of the next two years (2013 and 2014).

**TPI vs. CPI
2006-2012**



Travel Price Index for 2013:
January – 266.0
February – 273.6
March – 278.4

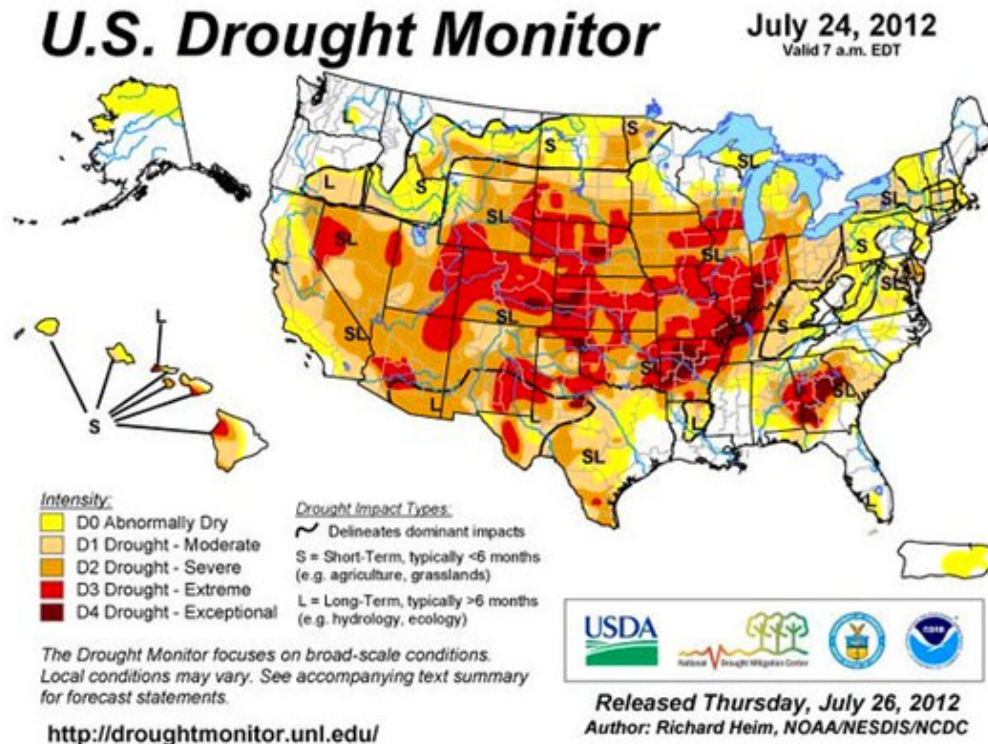
“Developed by the U.S. Travel Association, the Travel Price Index (TPI) measures the seasonally unadjusted inflation rate of the cost of travel away from home in the United States. The TPI is based on U.S. Department of Labor price data collected for the monthly Consumer Price Index (CPI). The TPI is released monthly and is directly comparable to the CPI.” - Source: U.S. Travel Association

***Note: 1982-1984 = 100*

National Weather

- 2012 was the warmest year on record in the United States, causing droughts across the mid-west and contributing to a number of wildfires in Colorado/Utah.
- A number of other unexpected and severe weather patterns hit locations throughout the US, including many tornadoes, severe tropical storms and hurricanes, thunderstorms, and unusual snow patterns.

Drought hits US hard during 2012 – Predicted to continue in 2013



**Note: 1984 = 100

Source: US Drought Monitor – NOAA.gov

National Weather – Hurricane Sandy

- During October 2012, Hurricane Sandy hit the eastern coast of the United States, causing billions of dollars of damage to buildings, infrastructure, and natural habitats.
- In the short term, Hurricane Sandy disrupted travel patterns throughout the US due to delayed or cancelled flights, dangerous road conditions, and economic uncertainty.
- The long term effects of Hurricane Sandy on travel behaviors are unclear; however continued severe storm patterns could bring more travel disruptions and further economic uncertainty.

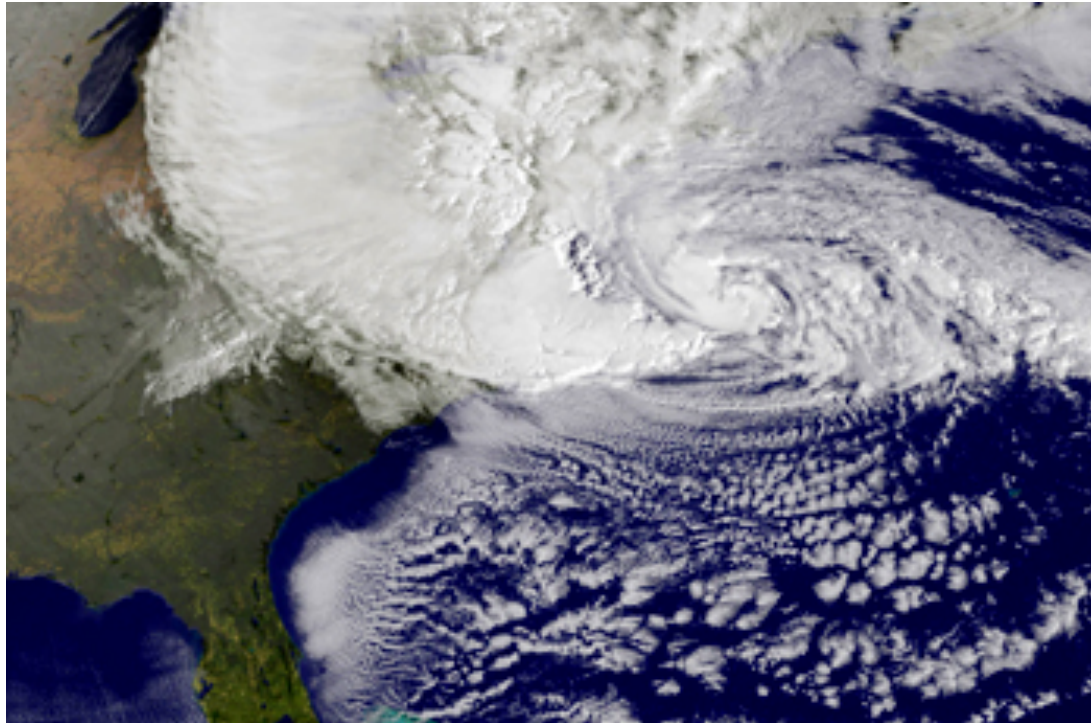
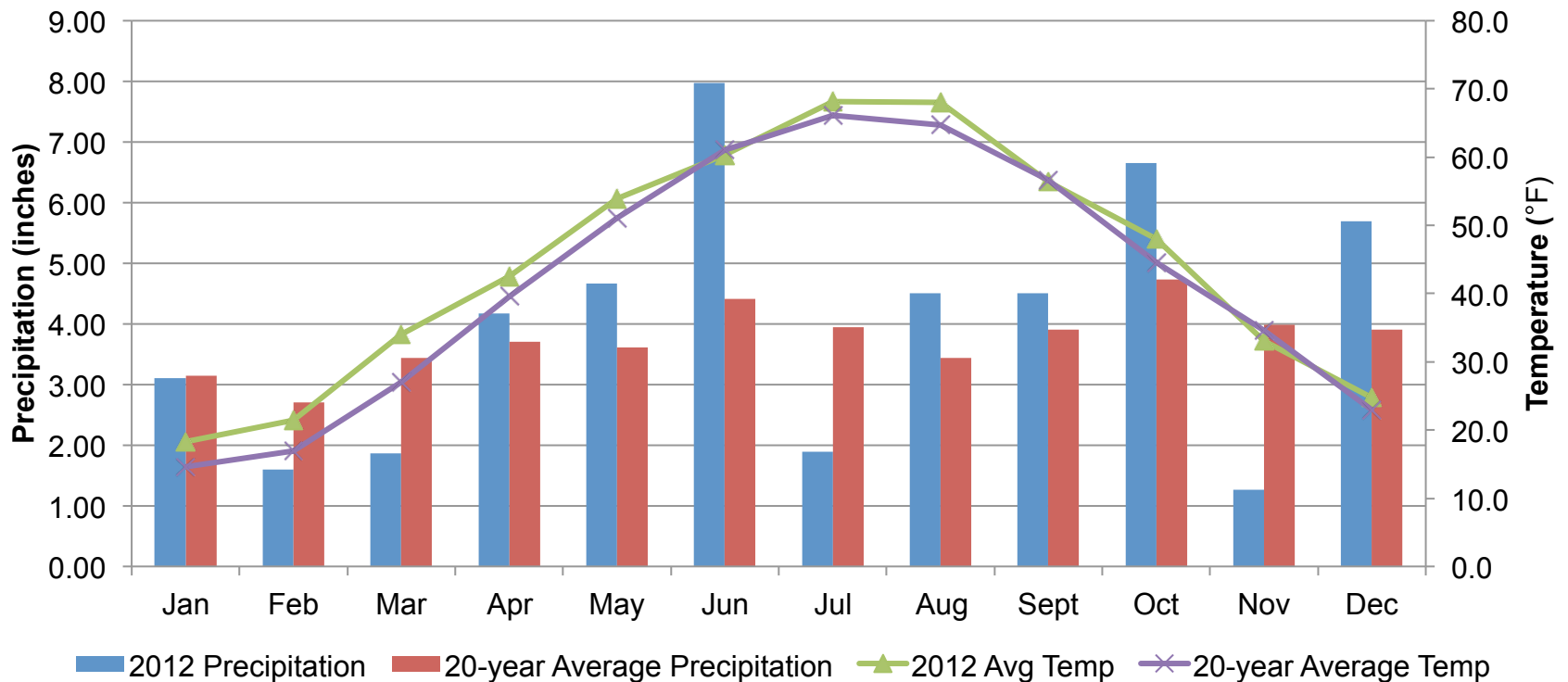


Image Source: Bloomberg News

Maine Weather

- Temperature and precipitation in Maine were both above average during 2012. Near drought conditions in February and March, however, provided difficult snow conditions for winter sports and contributed to a shorter winter travel season in Maine.
- June posed a particularly difficult month for weather, with temperatures just below average for the month and precipitation far above average.

Precipitation and Temperature – Maine 2012



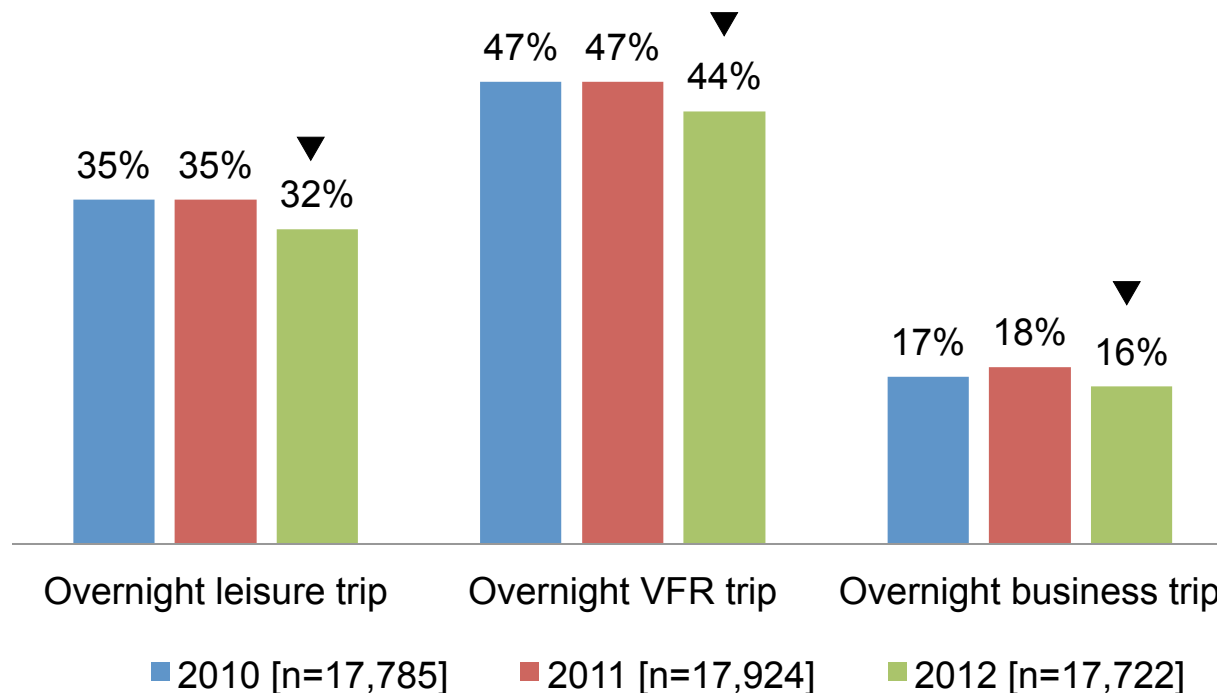
Baseline Visitor Statistics



Overnight Travel Among U.S. Residents

- The proportion of U.S. residents taking an overnight trip has dropped slightly in 2012 from consistent levels seen in 2010 and 2011. Drops were seen across the board in leisure trips, business trips, and trips to visit friends and relatives.

Proportion of U.S. Residents Taking a Trip



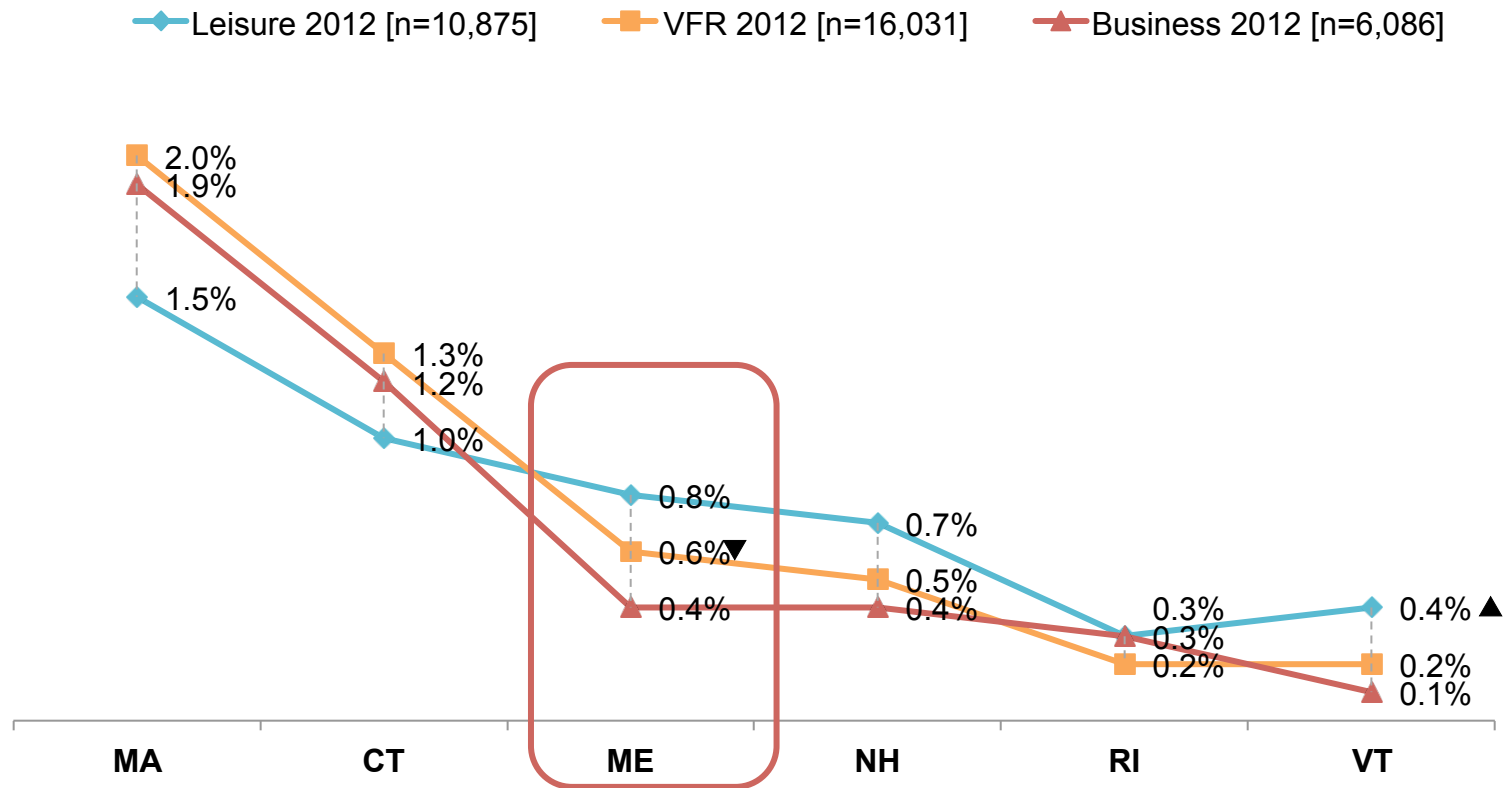
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Maine's Overnight Market Share – Trip Type

- Maine continues to take in about 1% of the total overnight leisure trips across the United States, just about equal to its New England neighbors. Maine falls slightly behind Massachusetts and Connecticut for market share, and just ahead of New Hampshire, Vermont, and Rhode Island. Maine's market share remains consistent with prior years and across seasons (shown in the following slides).

Maine's Overnight Market Share



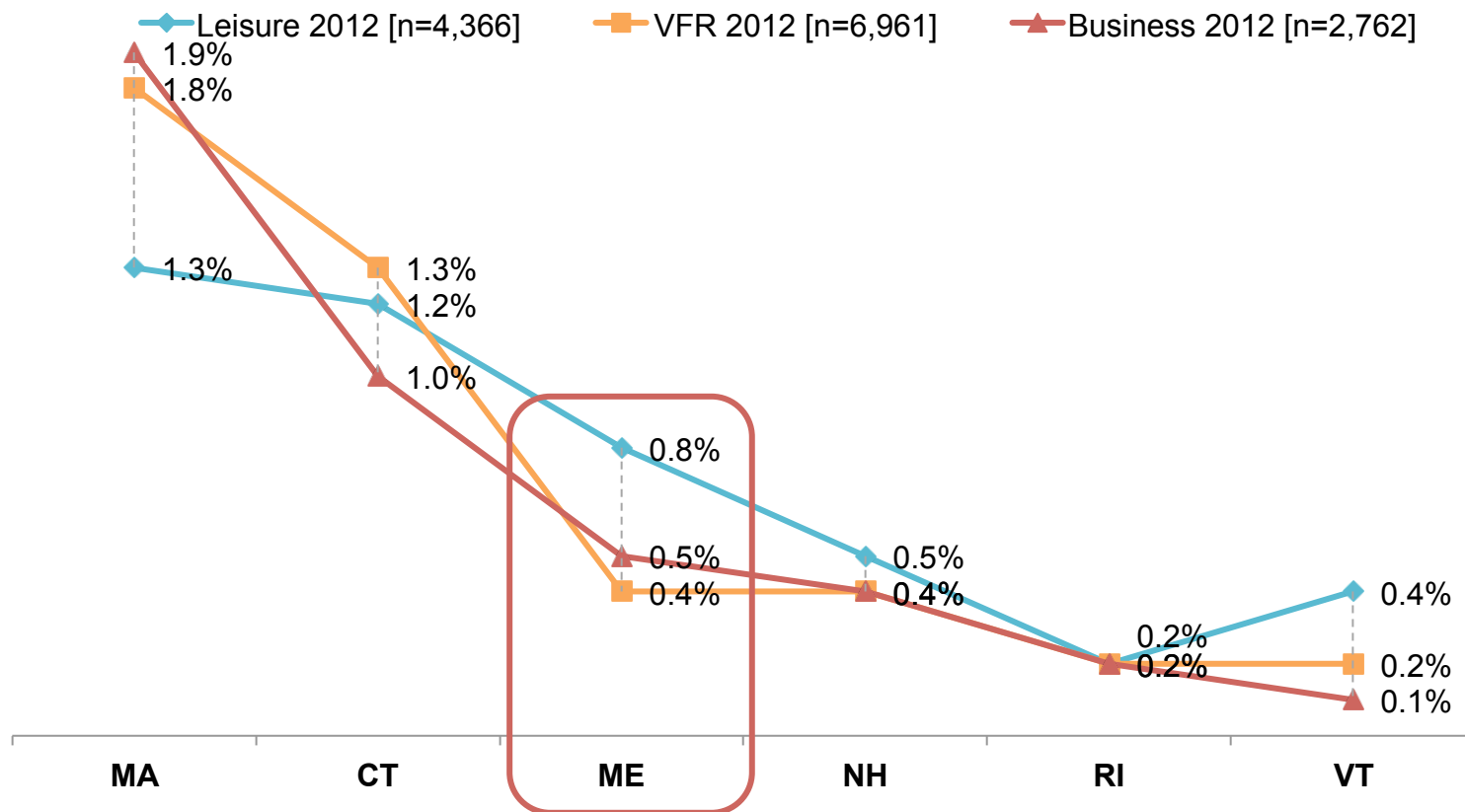
Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Maine's Overnight Market Share – WINTER

- Maine's market share of overnight leisure travel during the winter tracks closely behind Massachusetts and Connecticut and slightly outpaces the remaining New England states of New Hampshire, Rhode Island, and Vermont.

Maine's Overnight WINTER Market Share



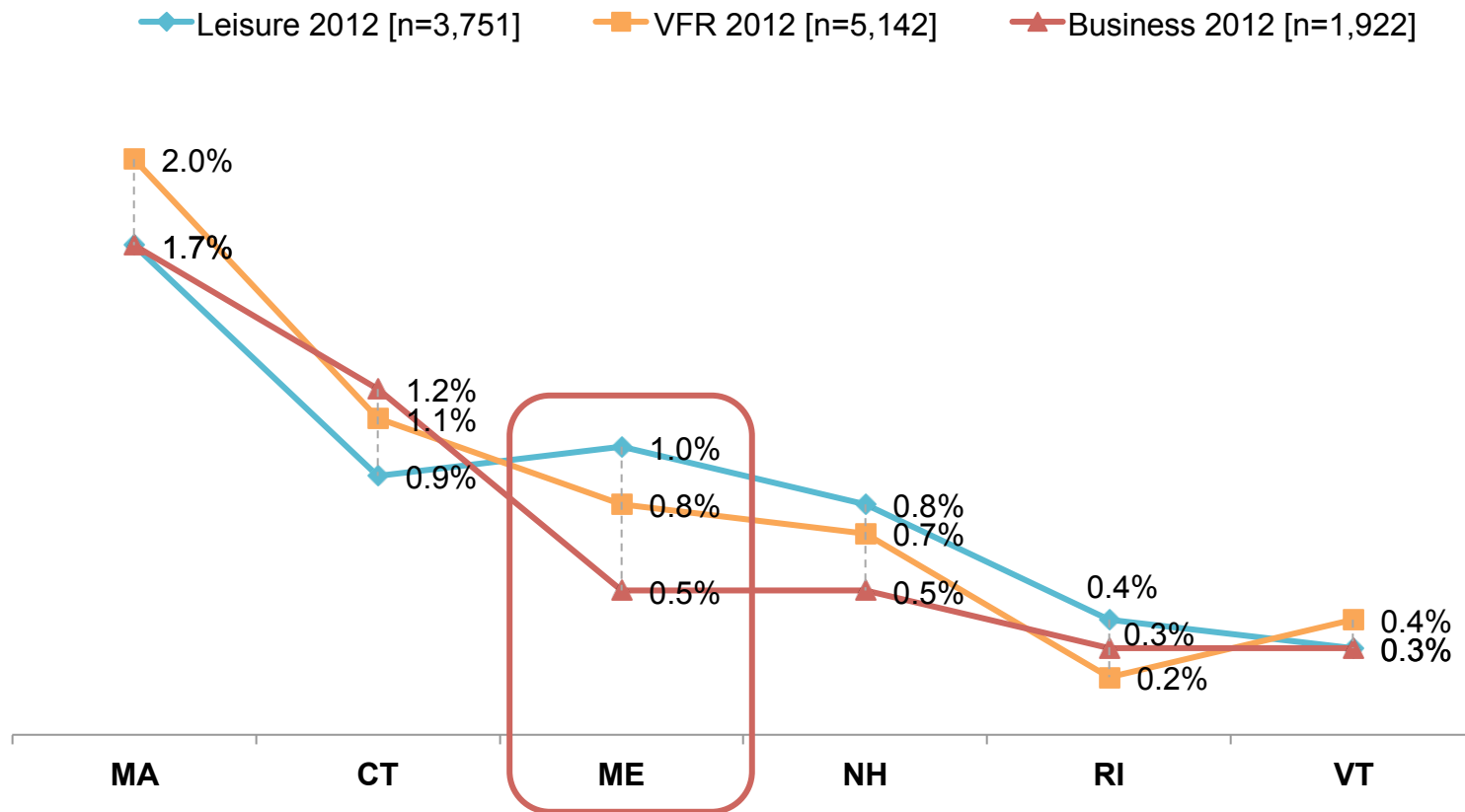
Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Maine's Overnight Market Share – SUMMER

- Maine's summer market share of overnight leisure travel is highest during the summer season, tracking closely behind only Massachusetts and surpassing the remaining New England states.

Maine's Overnight SUMMER Market Share



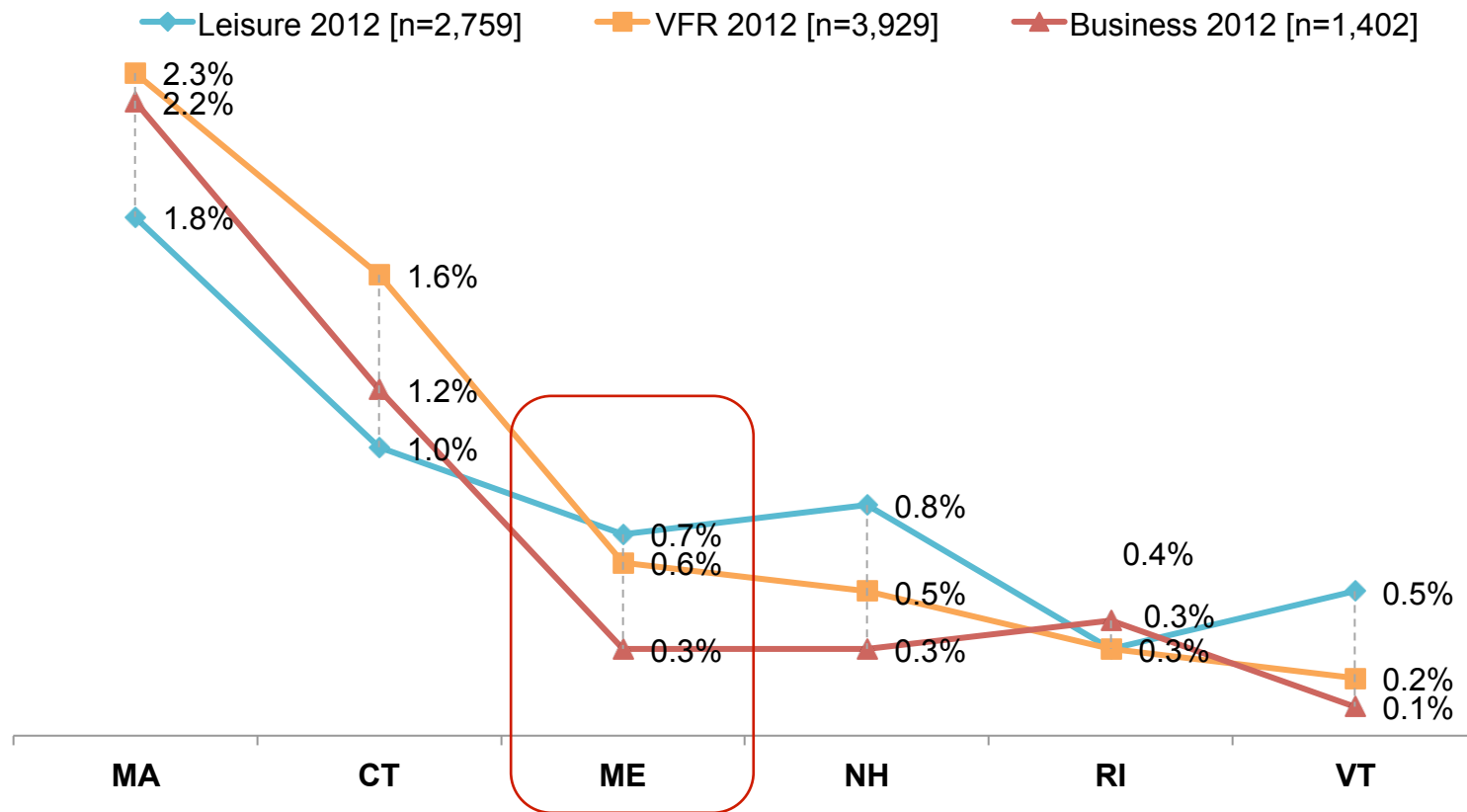
Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Maine's Overnight Market Share – FALL

- Maine's relative market share for overnight leisure travel is lowest during the fall season, where Massachusetts, Connecticut, and New Hampshire all have higher market shares.

Maine's Overnight FALL Market Share



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.

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Estimated Overnight Visitation to Maine*

- Maine entertained nearly 16 million overnight visitors in 2012, a 4.7% increase over the estimated number of overnight visitors in 2011. Two-thirds of those visitors came to Maine for a leisure trip, and the summer season attracted the highest proportion of overnight visitors to the State, with 55% visiting during the summer months.
- Winter visitation showed the largest year-over-year increase at nearly 7%, with summer and fall visitation showing smaller increases (4.7% and 3.5%, respectively).

	Tourism-Related Overnight Visitation					
	2012				2011	Y/Y Change
	Leisure	VFR	Business	Total	Total	
Net Trips	3,777,343	1,986,903	364,301	6,128,547	6,089,866	0.6%
Net Visitors	10,451,959	4,705,193	685,883	15,843,035	15,133,881	4.7%
Winter Trips	597,734	377,487	75,216	1,050,436	965,893	8.8%
Winter Visitors	1,572,042	807,821	145,919	2,525,782	2,361,907	6.9%
Summer Trips	2,043,119	971,392	161,403	3,175,914	3,241,639	-2.0%
Summer Visitors	5,925,044	2,525,619	274,385	8,725,048	8,333,341	4.7%
Fall Trips	1,136,490	638,024	127,682	1,902,197	1,882,334	1.1%
Fall Visitors	2,954,873	1,371,753	265,579	4,592,205	4,438,633	3.5%

*For the purposes of visitation estimates, only visitors on tourism related trips are included.

Tourism related trips include:

- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

Estimated Overnight Visitation to Maine*

- Maine's increase in overnight visitation between 2011 and 2012 was buoyed by an increase in out-of-state visitation. In-state visitation, on the other hand, experienced a 5.2% decline in 2012 as compared with 2011.

	Tourism-Related Overnight Visitation					
	2012				2011	Y/Y Change
	Leisure	VFR	Business	Total	Total	
Net Trips	3,777,343	1,986,903	364,301	6,128,547	6,089,866	0.6%
Net Visitors	10,451,959	4,705,193	685,883	15,843,035	15,133,881	4.7%
Resident Trips	262,700	162,999	48,790	474,489	524,176	-9.5%
Resident Visitors	726,893	385,999	91,859	1,204,751	1,270,186	-5.2%
Non-Resident Trips	3,514,643	1,823,904	315,511	5,654,058	5,565,690	1.6%
Non-Resident Visitors	9,725,066	4,319,194	594,023	14,638,283	13,863,695	5.6%

*For the purposes of visitation estimates, only visitors on tourism related trips are included.

Tourism related trips include:

- All leisure trips.
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- Business trips that are for a convention/conference/trade show or training/professional development.

Estimated Day-Trip Visitation to Maine*

- Tourism-related day visitation in 2012 showed overall stability with 2011, presenting a slight decline of 1.8%. Nearly 17 million day visitors came to the State in 2012. Like overnight visitors, two-thirds of these day visitors were on leisure trips.
- Though seasonal declines in day visitation to Maine were all relatively small, the winter season showed the sharpest decline at 2.5%. This is not surprising considering the poor snow conditions in early 2012, likely impacting day visitation among winter sports enthusiasts.

	Tourism-Related Day Visitation					
	2012				2011	Y/Y Change
	Leisure	VFR	Business	Total	Total	
Net Trips	4,402,533	1,876,129	453,771	6,732,433	6,659,365	1.1%
Net Visitors	11,400,250	4,517,509	861,804	16,779,563	17,086,916	-1.8%
Winter Trips	542,993	267,261	64,266	874,520	825,519	5.9%
Winter Visitors	1,238,024	614,701	127,246	1,979,971	2,030,848	-2.5%
Summer Trips	2,960,849	1,245,464	311,420	4,517,734	4,488,446	0.7%
Summer Visitors	7,816,642	3,001,568	604,156	11,422,366	11,620,295	-1.7%
Fall Trips	898,691	363,403	78,085	1,340,180	1,345,400	-0.4%
Fall Visitors	2,345,584	901,239	130,403	3,377,225	3,435,773	-1.7%

*For the purposes of visitation estimates, only visitors on tourism related trips are included.

Tourism related trips include:

- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

Estimated Day-Trip Visitation to Maine*

- Maine's tourism-related day trip visitation to Maine remained relatively stable with 2011 thanks to a sizeable increase in out-of-state visitation. The 24.9% drop in in-state day visitation was countered by a strong 12.6% increase in non-resident day visitation.

	Tourism-Related Day Visitation					
	2012				2011	
	Leisure	VFR	Business	Total	Total	Y/Y Change
Net Trips	4,402,533	1,876,129	453,771	6,732,433	6,659,365	1.1%
Net Visitors	11,400,250	4,517,509	861,804	16,779,563	17,086,916	-1.8%
Resident Trips	1,052,660	677,212	297,999	2,027,872	2,587,858	-21.6%
Resident Visitors	2,725,838	1,630,652	565,961	4,922,451	6,552,458	-24.9%
Non-Resident Trips	3,349,873	1,198,916	155,772	4,704,561	4,071,507	15.5%
Non-Resident Visitors	8,674,412	2,886,857	295,843	11,857,112	10,534,457	12.6%

*For the purposes of visitation estimates, only visitors on tourism related trips are included.

Tourism related trips include:

- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

Estimated Visitor Expenditures*

- Non-resident visitors to Maine on tourism related trips accounted for nearly \$5 billion in spending while in Maine, a (0.9%) increase over 2011. Spending on retail goods and food make up more than half of these tourism expenditures in 2012.
- Half of that spending took place during the busy summer tourism season, with the fall season accounting for over \$1.5 billion of direct tourism spending.

Direct Tourism Expenditures Non-Resident Tourism Related Trips*				
	Winter/Spring 2012	Summer 2012	Fall 2012	Total
Net Spending	\$872,941,077	\$2,537,109,568	\$1,566,510,699	\$4,976,561,344
Lodging	\$222,952,656	\$647,987,971	\$400,093,123	\$1,271,033,750
Transportation	\$88,371,075	\$256,841,046	\$158,583,709	\$503,795,830
Gasoline	\$17,699,946	\$51,442,993	\$31,762,917	\$100,905,856
Food	\$233,674,526	\$679,149,936	\$419,333,739	\$1,332,158,202
Retail Goods	\$250,522,565	\$728,116,952	\$449,567,890	\$1,428,207,407
Recreation	\$59,720,309	\$173,570,669	\$107,169,321	\$340,460,298

*For the purposes of expenditure estimates, visitors are defined as out of state visitors on tourism related trips.

Tourism related trips include:

- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

Maine Overnight Trip Planning



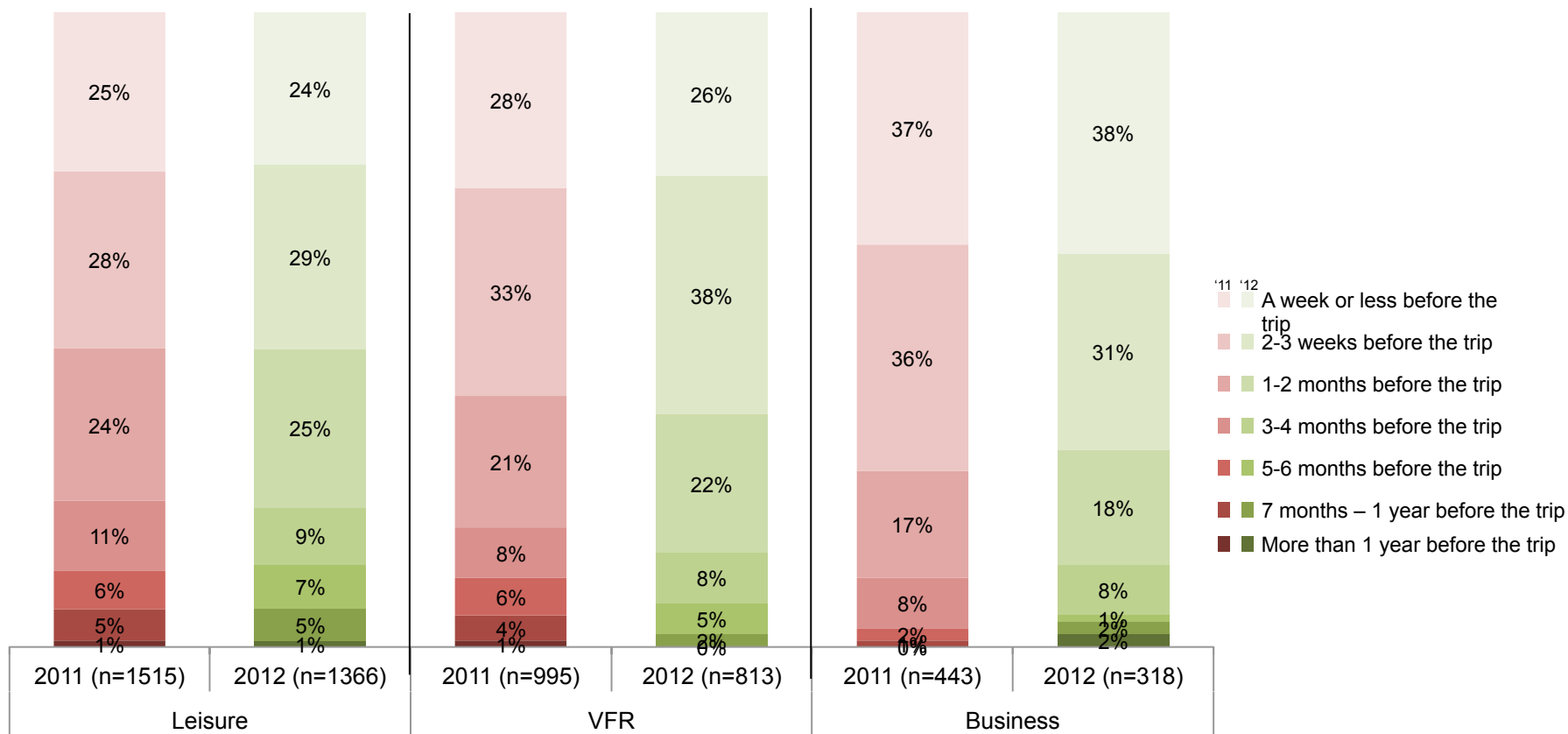
Planning Timeframe: Began to Think About Trip

- Across all trip types, there were no significant year-over-year changes in the time period that elapsed between when a traveler began thinking about their trip to Maine and when they went on that trip.
- The charts below illustrate that leisure trip planning begins the furthest in advance (23% planning five or more months in advance), followed by VFR trips (15%), and finally business trips (8%).



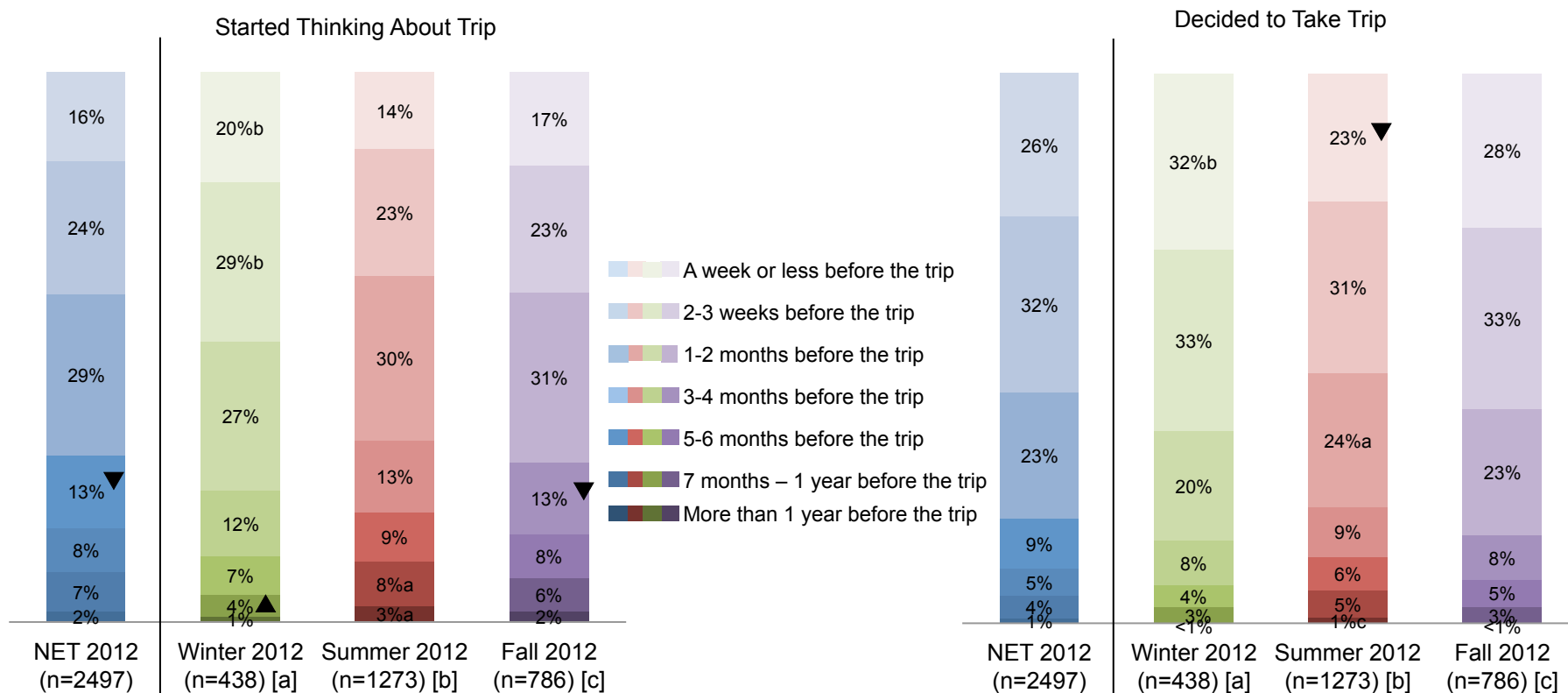
Planning Timeframe: Decided to Take Trip

- In 2012, the planning horizon for how far in advance travelers made the final decision to take a trip was statistically stable with 2011.
- The decision making time-frame is still primarily within three weeks of traveling to Maine, with at least three-fourths of travelers deciding to take their trip within two months.



Planning Timeframe by Season

- Overnight winter trips to Maine had a shorter planning timeframe versus trips taken in the summer and fall. The timing of the final decision to take a trip, however, was relatively consistent across seasons.
- As would be expected, the shortest trip-planning timeframes can be found among travelers staying in unpaid accommodations, repeat visitors, and nearby visitors from Maine and other New England states.



Trip Planning Resources

- Consistent with prior years, the Internet remains the most widely used trip planning source for overnight trips to Maine, especially among leisure travelers. The advice of friends and family also remains an important resource, though the proportion depending on this resource has dropped from 2011 (42%).

	NET 2012 (n=2497)	Leisure (n=1366) [a]	VFR (n=813) [b]	Business (n=813) [c]
The Internet	63%	71%bc	51%	58%
Friends/relatives/co-workers' advice	35%▼	29%	49%ac	25%
AAA	18%	19%	15%	23%b
Travel guides/brochures	13%	16%b	9%	12%
Social Media	8%	9%	8%	8%
Travel Books	8%	10%b	6%	7%
Travel magazines	8%	8%	7%	10%
Articles or travelogues	7%	8%b	6%	6%
Contact local convention and visitors bureaus	5%	7%b	3%	4%

	NET 2012 (n=2497)	Winter (n=438) [d]	Summer (n=1273) [e]	Fall (n=786) [f]
The Internet	63%	62%	63%	63%
Friends/ relatives/ co-workers' advice	35%▼	37%e	33%▼	38%
AAA	18%	18%	16%▼	21%
Travel guides/ brochures	13%	10%▼	12%	17%de
Social Media	8%	8%	7%	11%
Travel Books	8%	8%▼	7%	10%
Travel magazines	8%	8%▼	7%	9%
Articles or travelogues	7%	5%▼	6%▼	11%de
Contact local convention and visitors bureaus	5%	5%	3%▼	8%e

Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?

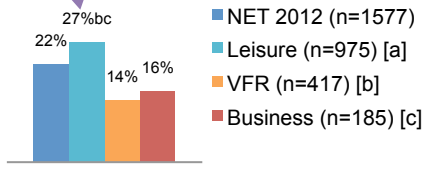
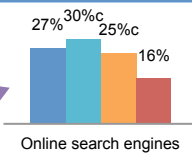
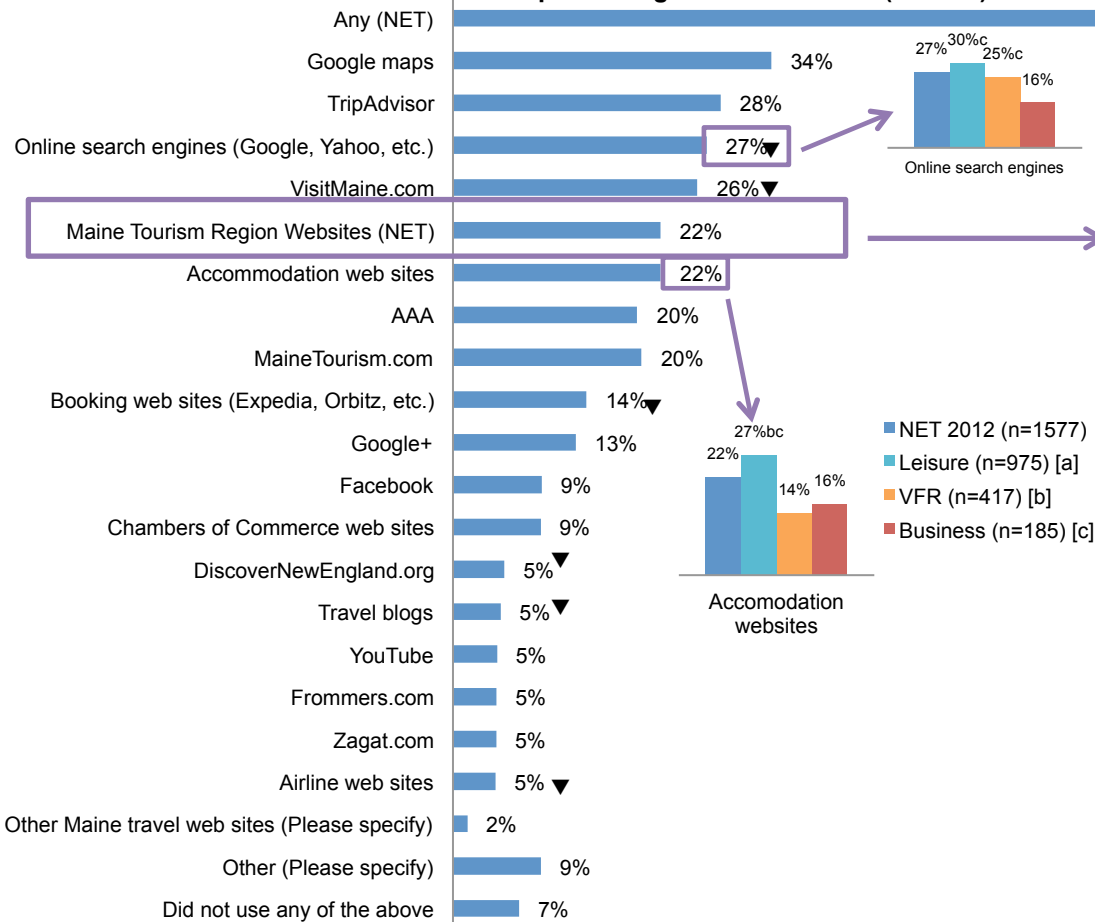
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

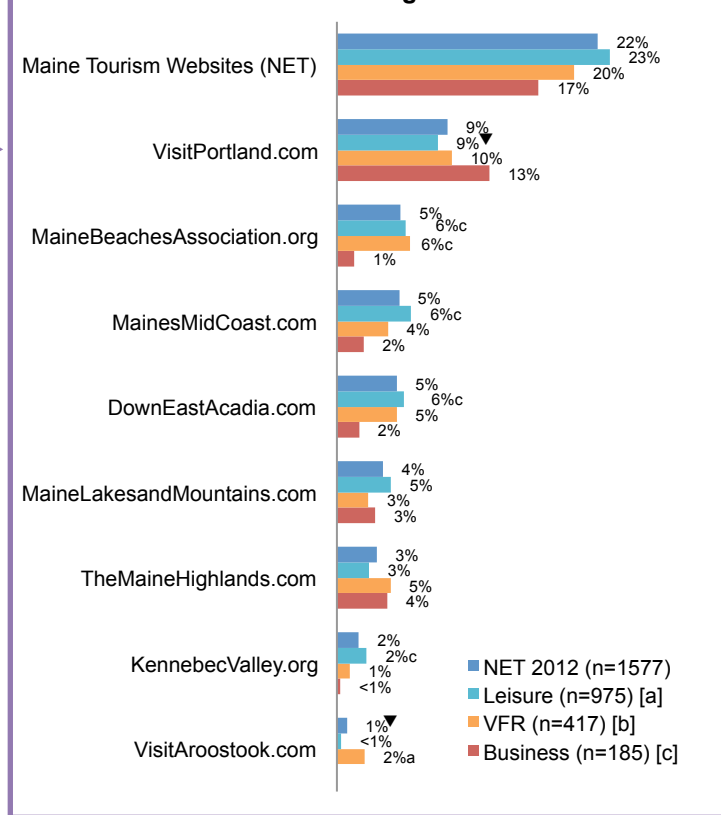
Online Trip Planning Resources

- Though the use of online planning sources overall was statistically stable with 2011 usage, some resources showed a decline in usage for 2012 (online search engines, VisitMaine.com, and booking websites are a few examples). Accommodation websites and online search engines were more widely used by leisure travelers.

Online Trip Planning Resources Used (n=1577)



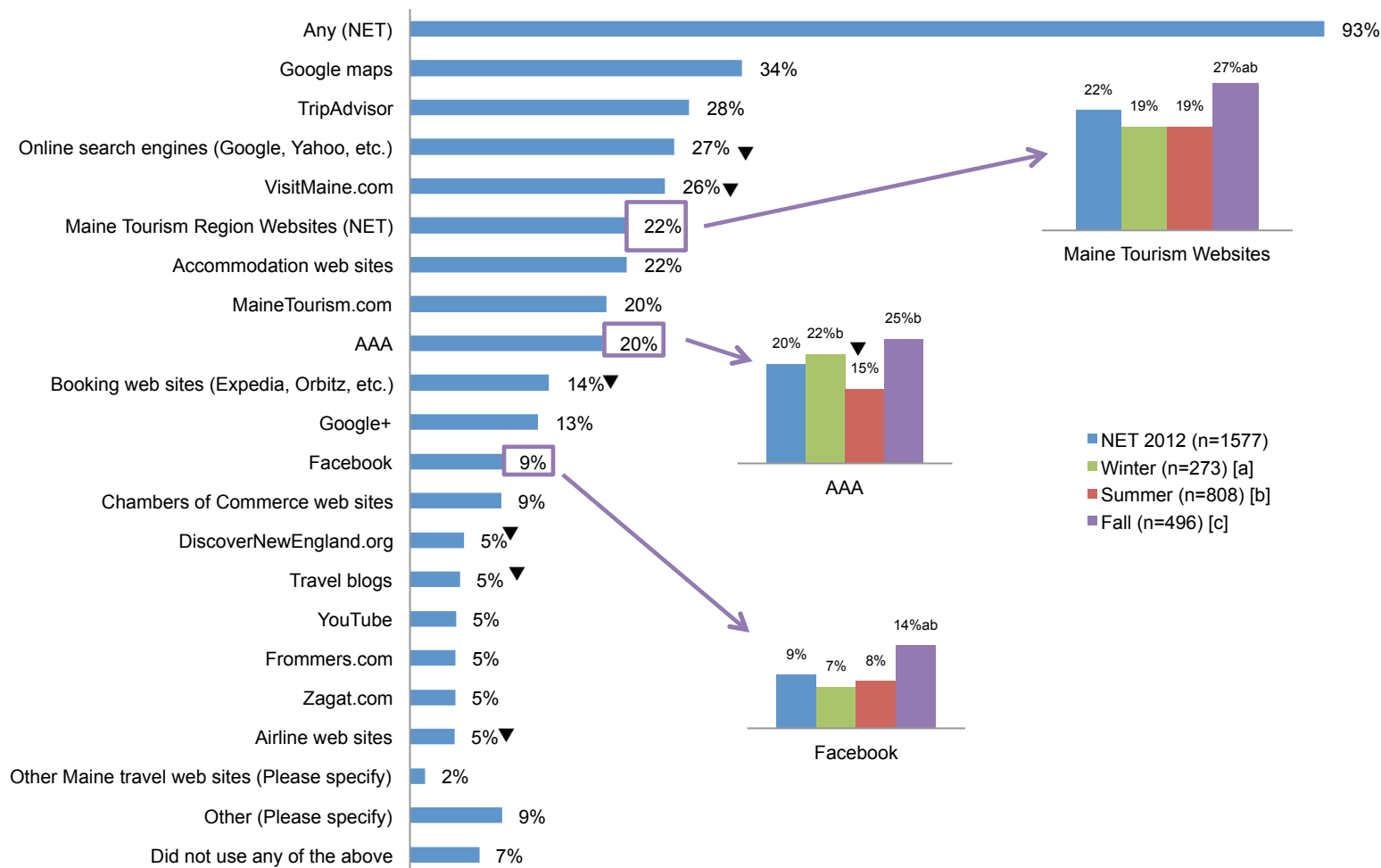
Maine Tourism Region Websites



Online Trip Planning Resources by Season

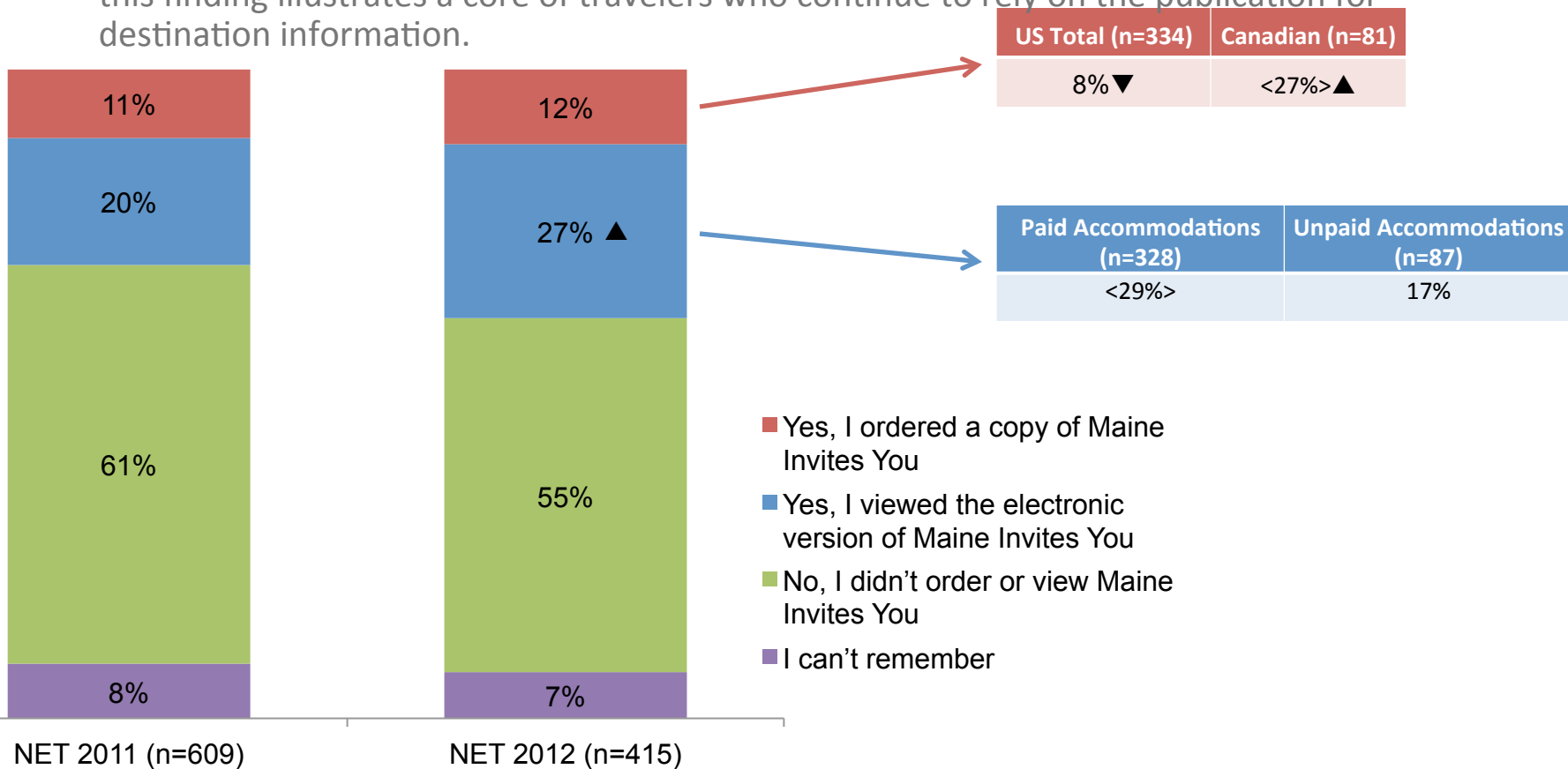
- Some seasonal differences can be seen in the online trip planning resources used by travelers. For example, travelers during the Fall season are more likely to consult with Maine Tourism Region websites and Facebook, while both Winter and Fall travelers are more likely to consult with the AAA website than are Summer travelers.

Online Trip Planning Resources Used (n=1577)



Maine Invites You Usage Through VisitMaine.com

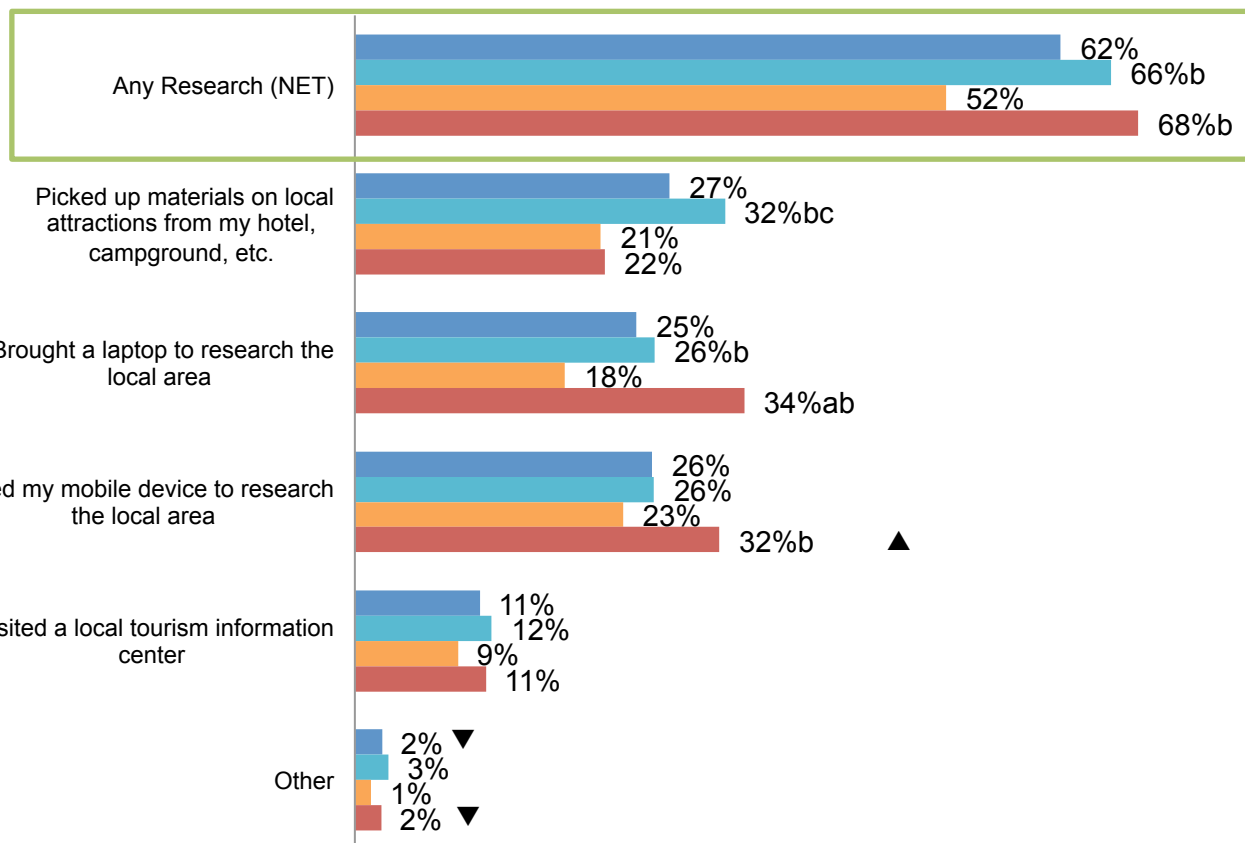
- Two in five overnight visitors to Maine who went to VisitMaine.com either viewed an electronic copy or ordered a hard copy of *Maine Invites You*. This is an increase over the proportion who acted likewise in 2011 (31%), and is primarily driven by a greater proportion of travelers who viewed the electronic version of this publication. Overall, this finding illustrates a core of travelers who continue to rely on the publication for destination information.



Trip Research While in Maine

- Consistent with 2011, nearly two-thirds of overnight visitors conducted research on their destination after arriving. Not surprisingly, this was higher among leisure and business travelers. Business travelers also showed a significant increase over 2011 in the usage of their mobile device to research the local area.

Trip Research



First-time visitors to Maine are significantly more likely to conduct additional research after arriving in Maine (82% versus 58% of repeat visitors).

Travelers staying in paid accommodations are also more likely to research their destination during their trip (67% versus 51% of visitors not paying for their accommodations).

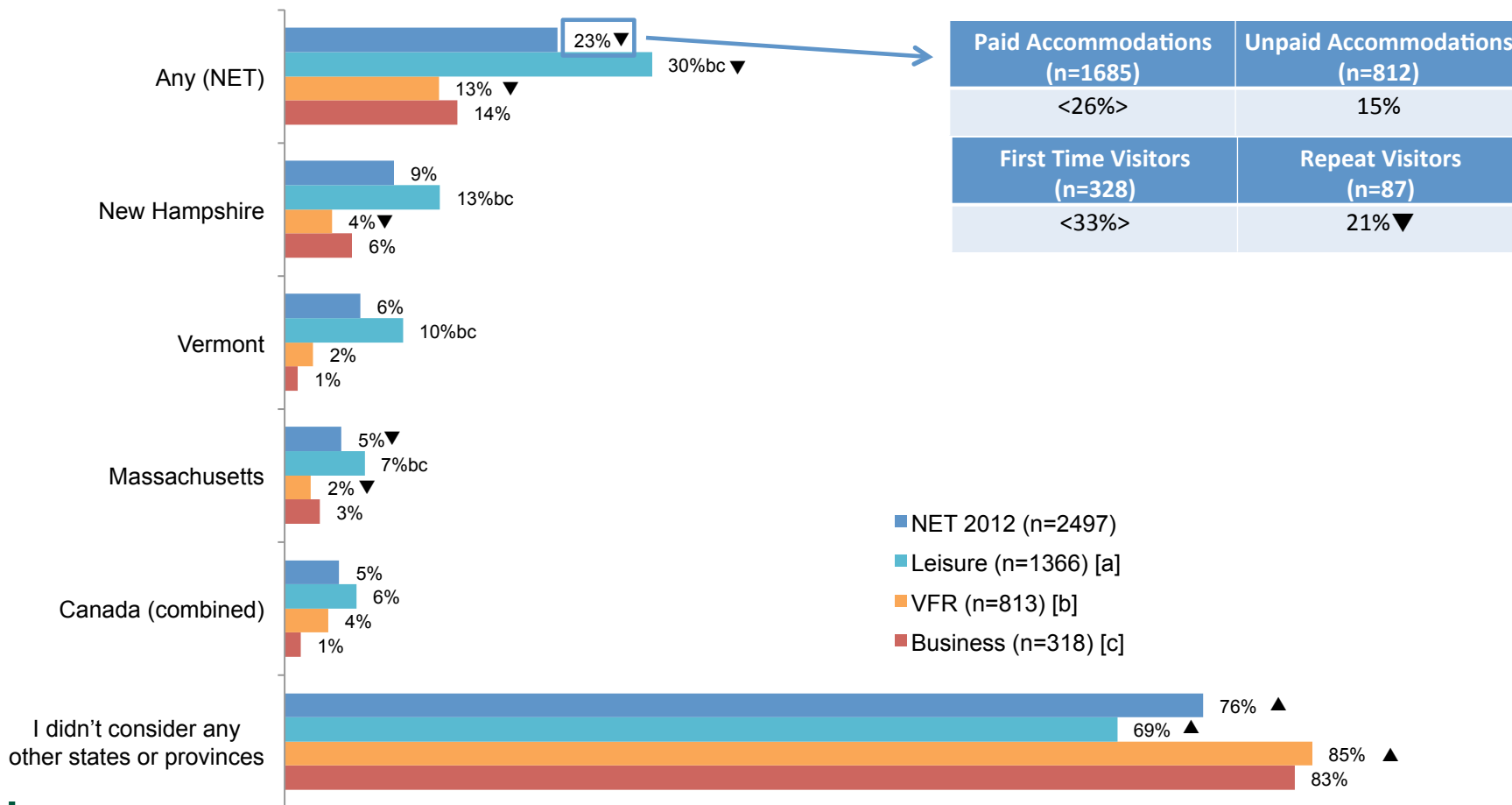
- NET 2012 (n=2497)
- Leisure (n=1366) [a]
- VFR (n=813) [b]
- Business (n=318) [c]

Overnight Visitor Travel Logistics



Other Destinations Considered

- Overall, three-fourths of overnight visitors to Maine did not consider any other destination when planning their trip, a significant increase over 2011 (69%). However, it's important to note that one-fourth of visitors still *did* consider other destinations for this trip, though this proportion is down slightly from 2011 (29%).
- Leisure travelers are more likely to have considered other destinations, with most taking a closer look at New Hampshire, Vermont, and Massachusetts.



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

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

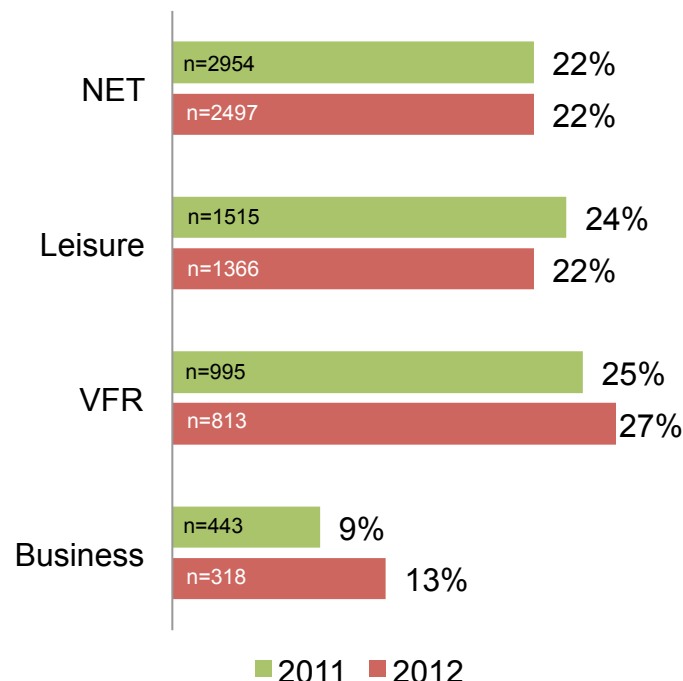
Travel Party Size and Composition

- Travel party size and the proportion of visitors traveling with children are both consistent with what was seen in 2011.
- As would be expected, business travelers travel with fewer people, and likewise are less likely to be traveling with children.

Average Number of People in Travel Party



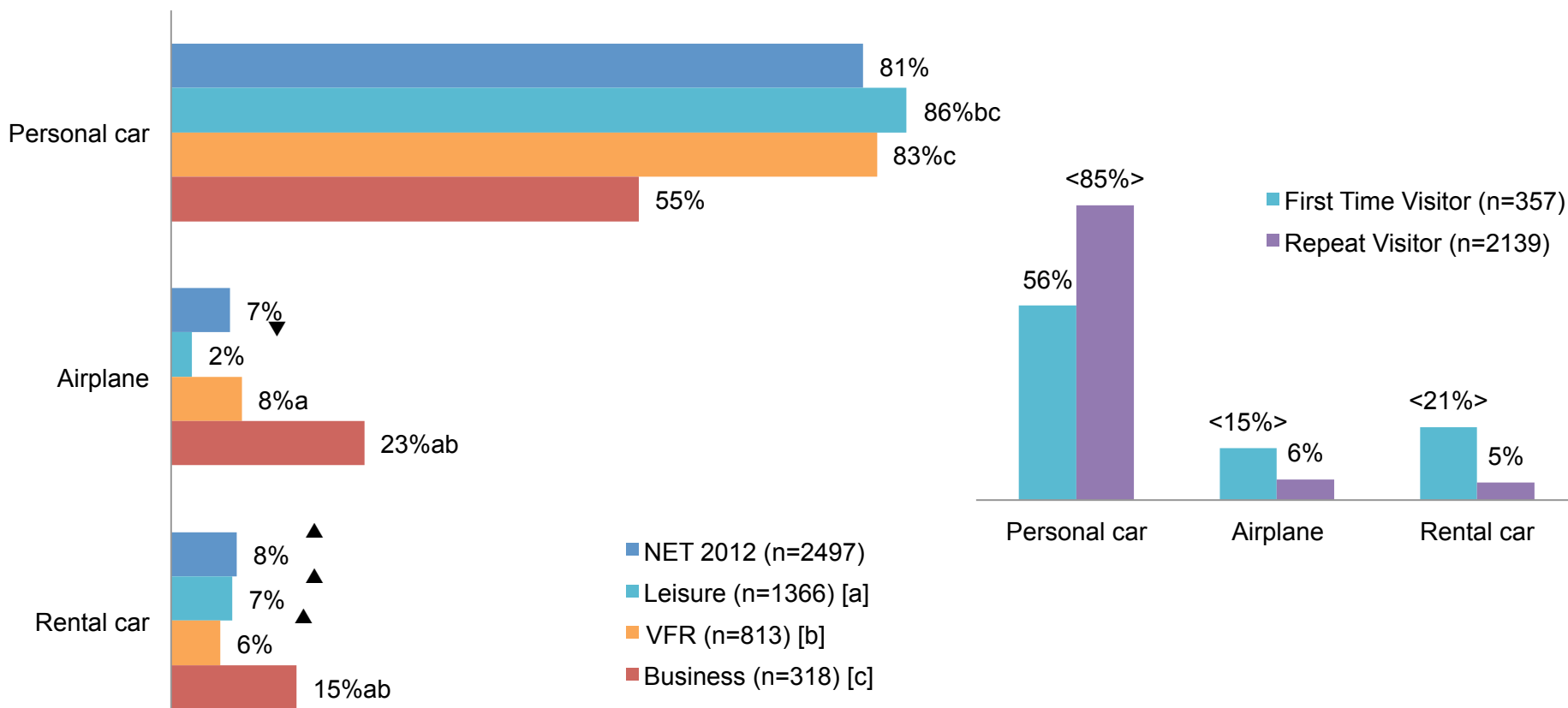
Percent Traveling with Children



Transportation Method

- The personal car remains by far the dominant transportation mode for traveling to Maine for an overnight visit, especially among leisure travelers and those visiting friends and relatives.
- First-time and repeat visitors show differences in their preferred mode of transportation, with repeat visitors being more likely to take their personal car and first-time visitors more likely to travel by airplane or rental car.

Transportation Method



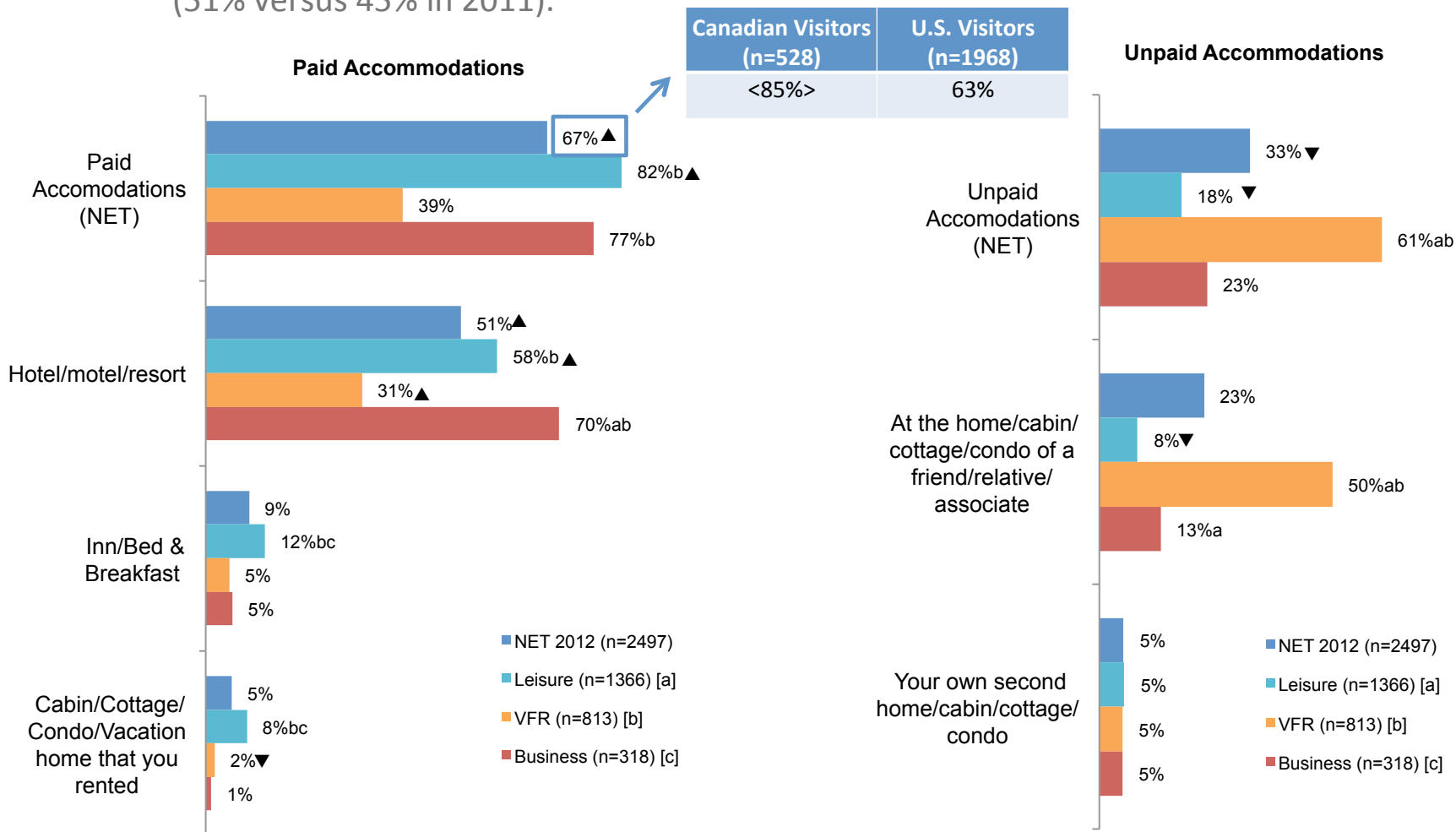
Regional Q26. Which of the following types of transportation did you use to travel the most miles from your home to get to your Maine destination?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Accommodations

- Two-thirds of overnight visitors to Maine stayed in paid accommodations during their 2012 trip to Maine, a significant increase over the proportion seen in 2011 (63%). This increase was primarily driven by an increase in travelers staying in a hotel/motel/resort (51% versus 45% in 2011).



Regional Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

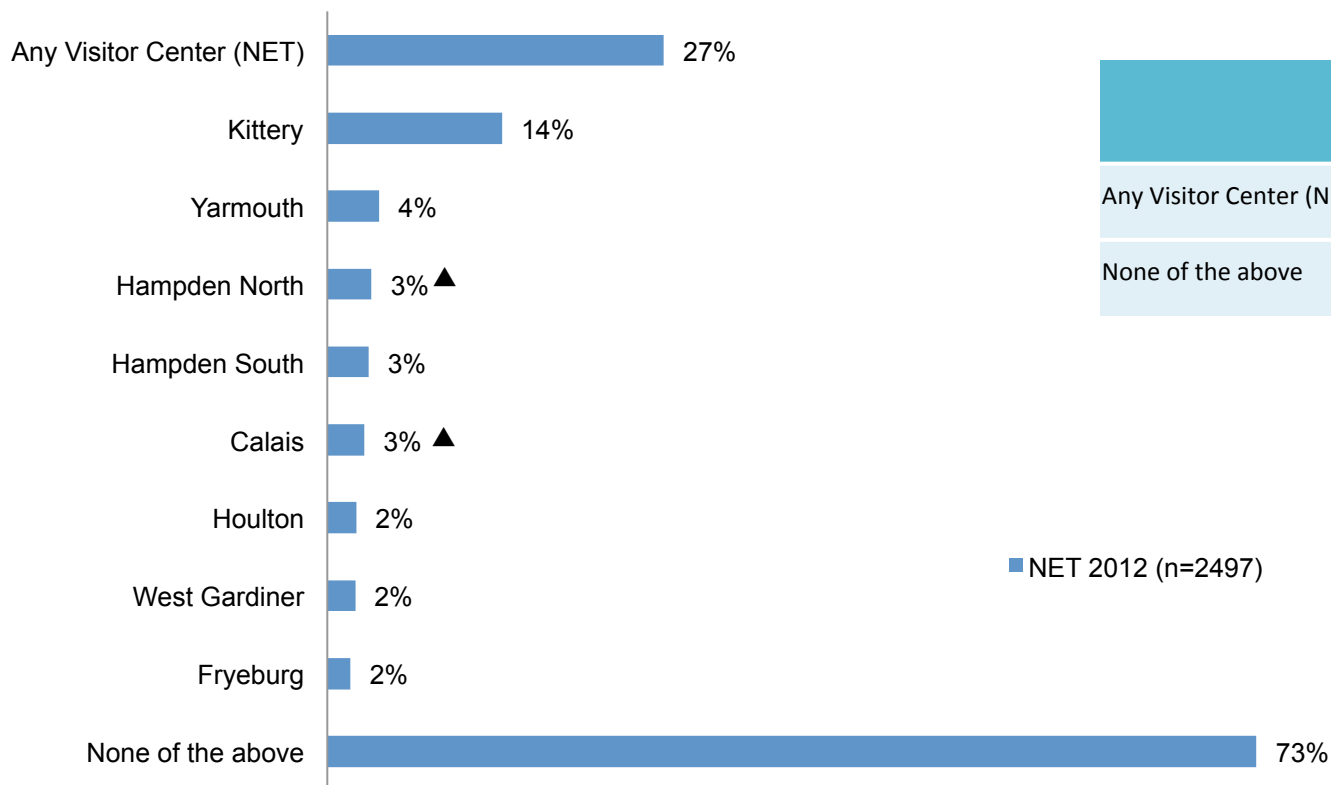
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Visitor Center Usage

- In 2012, one-fourth of overnight visitors reported using a Visitor Center during their trip to Maine. The Kittery Visitor’s Center was used by the largest percentage of overnight visitors, serving as a gateway to Maine for visitors from Southern New England and beyond as they enter the state on the Maine Turnpike. Though the Hampden North and Calais Visitor Centers had shown decreases in reported usage from 2010 to 2011, levels reported in 2012 are up once again to 2010 levels.

Visitor Centers Used

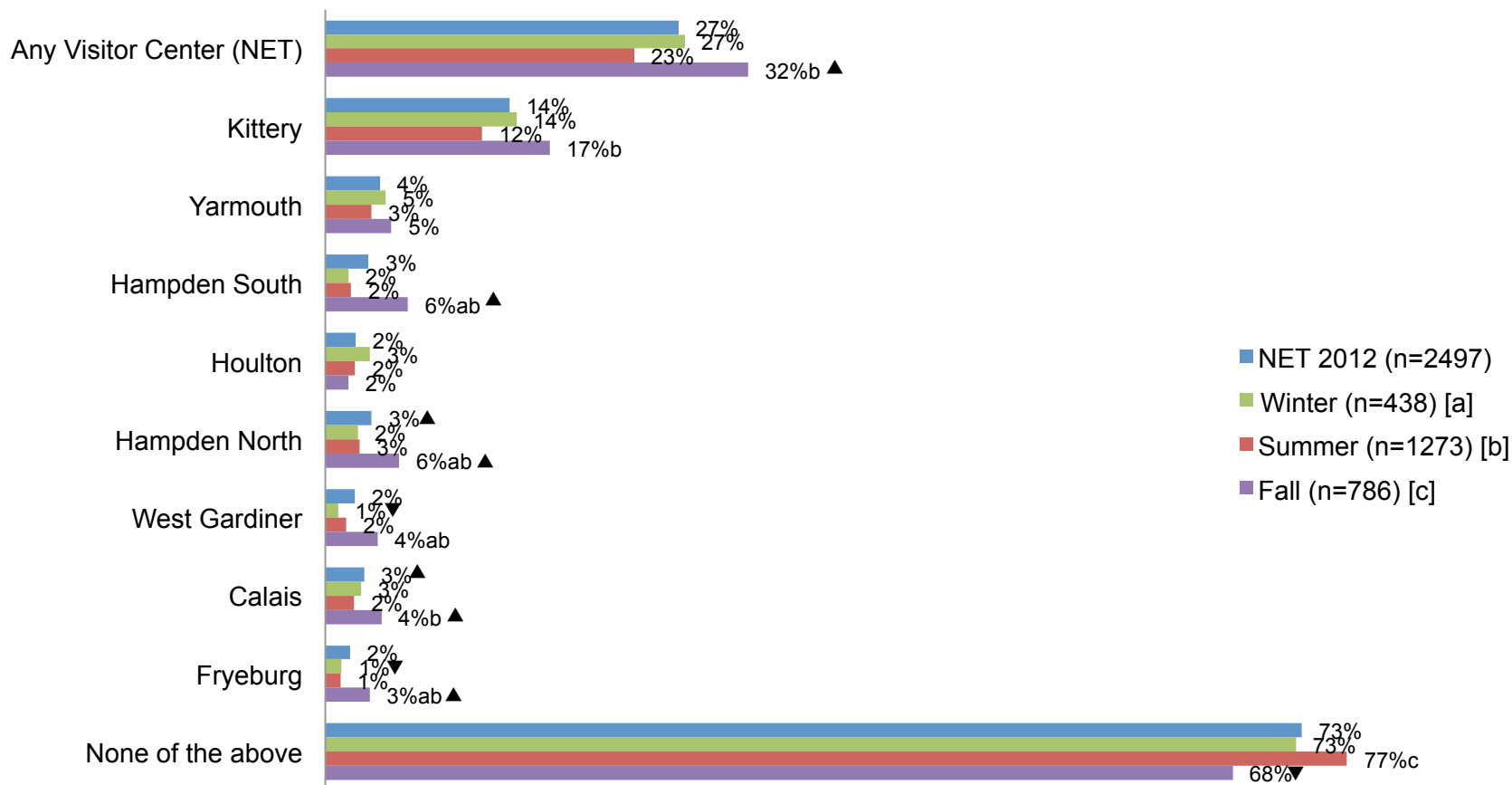


	Leisure (n=1366) [a]	VFR (n=813) [b]	Business (n=318) [c]
Any Visitor Center (NET)	24%	27%▲	35%ab
None of the above	76%c	73%c▼	65%

Visitor Center Usage by Season

- Seasonal differences are evident in Visitor Center usage, with Fall travelers reporting more usage of the centers than summer and winter travelers. Fall travelers also showed an increase in Visitor Center usage over 2011. While one-third of Fall travelers stopped at a Maine Visitor Center in 2012, only one-fifth did so in 2011.

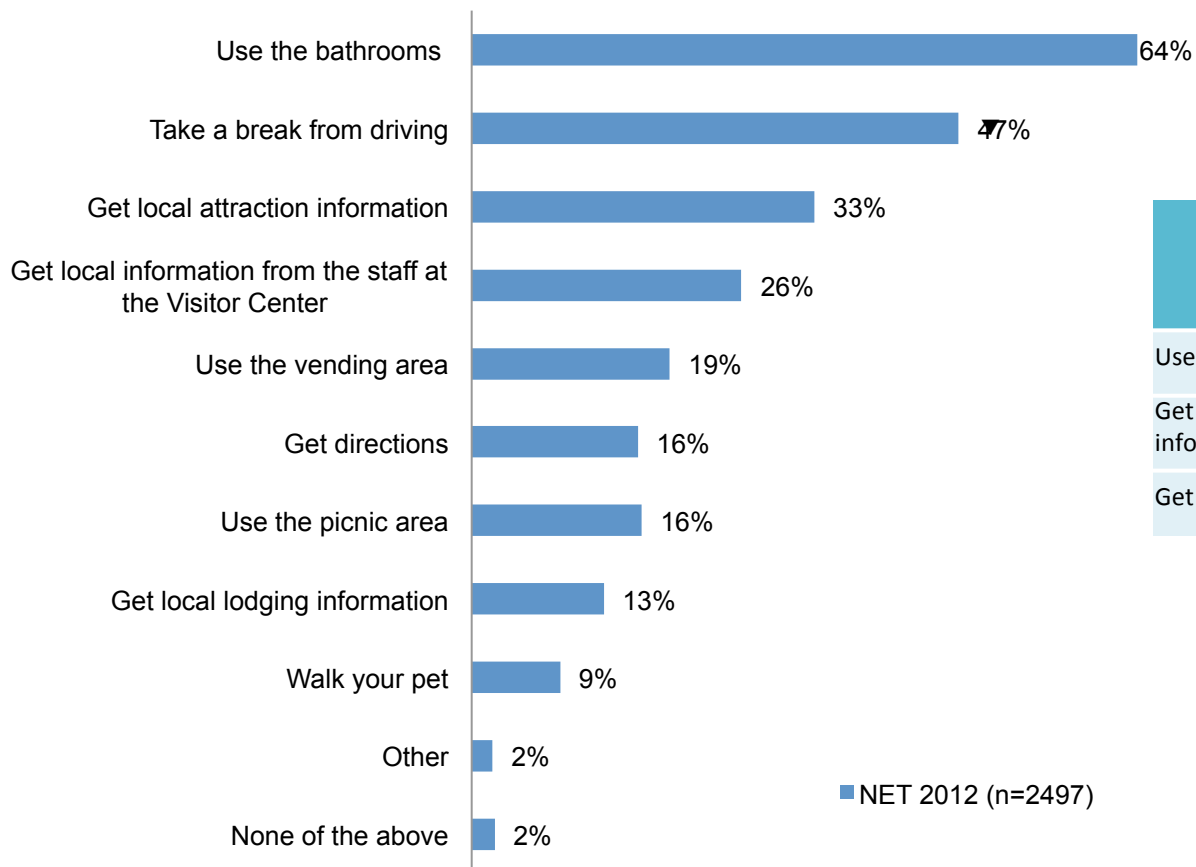
Visitor Centers Used



Reasons for Visitor Center Usage

- Two-thirds of overnight visitors who went to a Maine Visitor Center reported using the bathrooms at the Center, while half just needed to take a break from driving. Between one-quarter and one-third used the facility to either get local information from staff or to obtain local attraction information.

Reasons Used Visitor Center

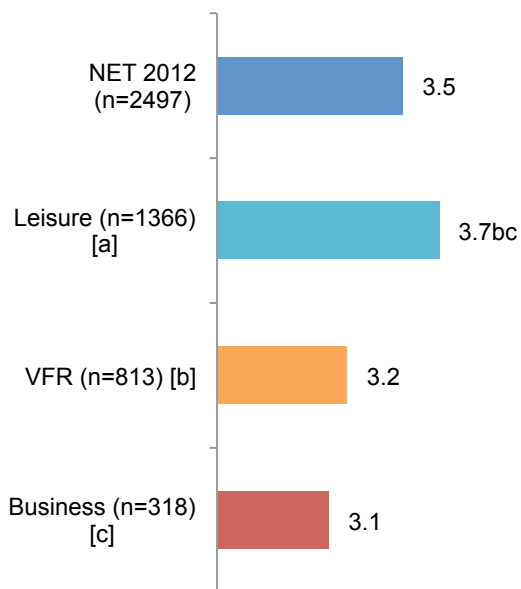


	Leisure (n=1366) [a]	VFR (n=813) [b]	Business (n=318) [c]
Use the bathroom	69% ^c	62%	52%
Get local attraction information	42% ^{bc}	24%	24%
Get directions	13%	14%	29% ^{ab}

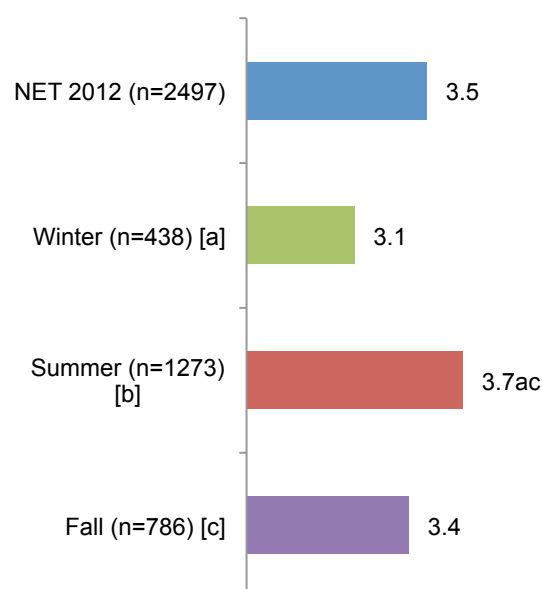
Length of Stay in Maine

- On average, overnight visitors to Maine stayed for 3-4 nights. Leisure travelers, and those visiting during the summer months, stayed in Maine a bit longer.
- Overnight visitors from Canada and those visiting from outside of New England also stay significantly more nights on average than visitors from Maine or other parts of New England.

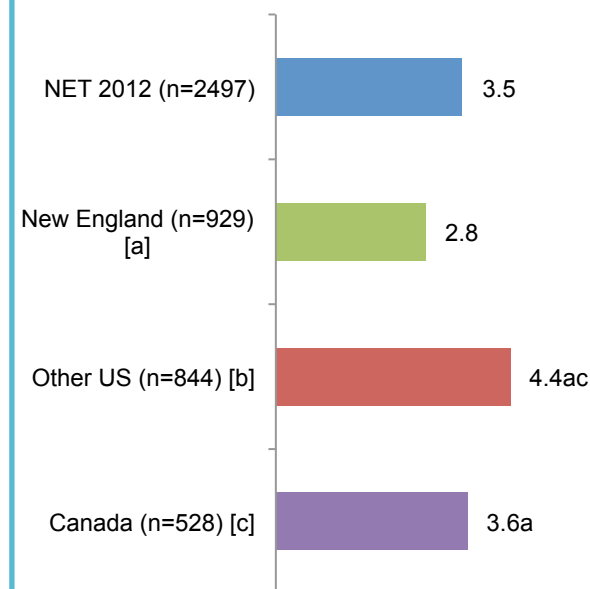
Average nights away from home by Trip Type



Average nights away from home by Season



Average nights away from home by residence



Regional Q8. On this trip to Maine, how many nights were you away from home?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

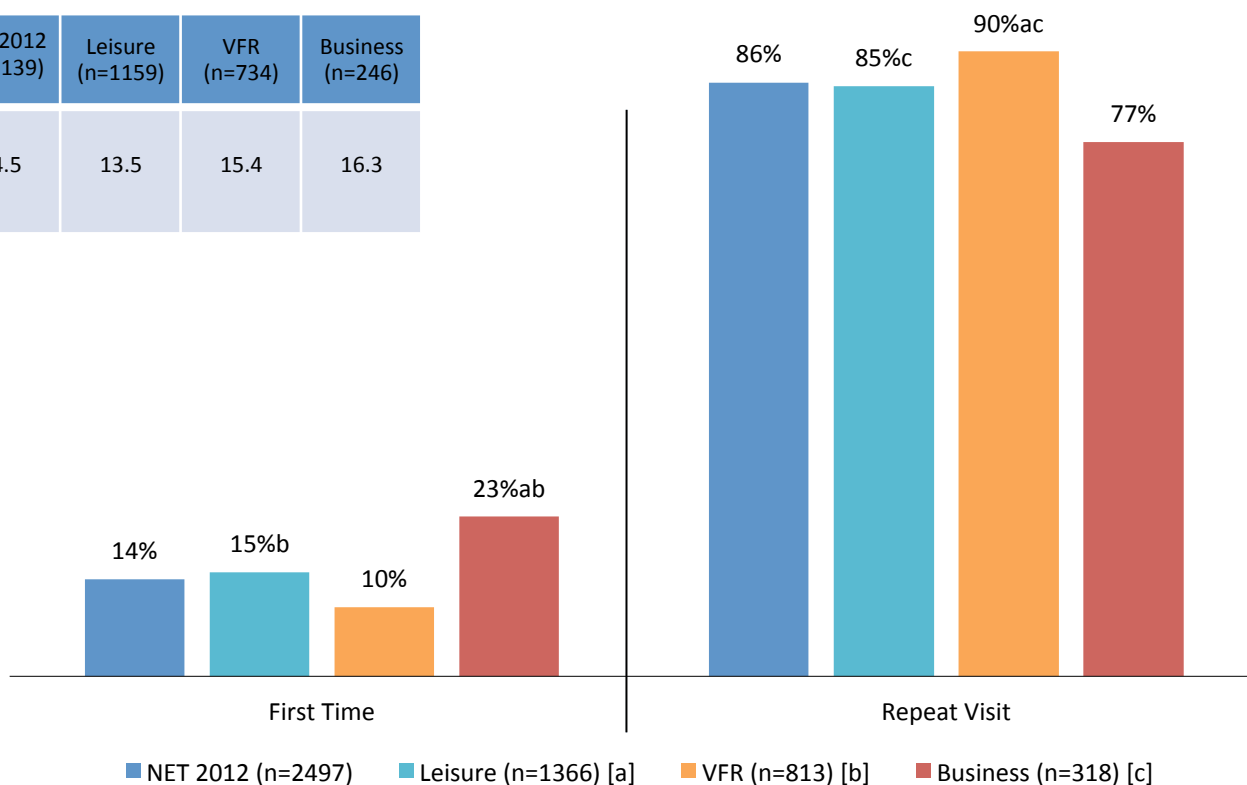
The Maine Overnight Visitor Experience



Repeat versus First Time Visitors by Trip Type

- Fewer than one-in-six visitors to the state are first time visitors. Though the proportion of first-time visitors had dropped from 17% in 2010 to 14% in 2011, this proportion remains at 14% for 2012.
- Business travelers are more likely to be visiting Maine for the first time.

Overnight Visitors	NET 2012 (n=2139)	Leisure (n=1159)	VFR (n=734)	Business (n=246)
Average number of trips to Maine in past 5 years	14.5	13.5	15.4	16.3



Regional Q9. Was this your first visit in Maine?

Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

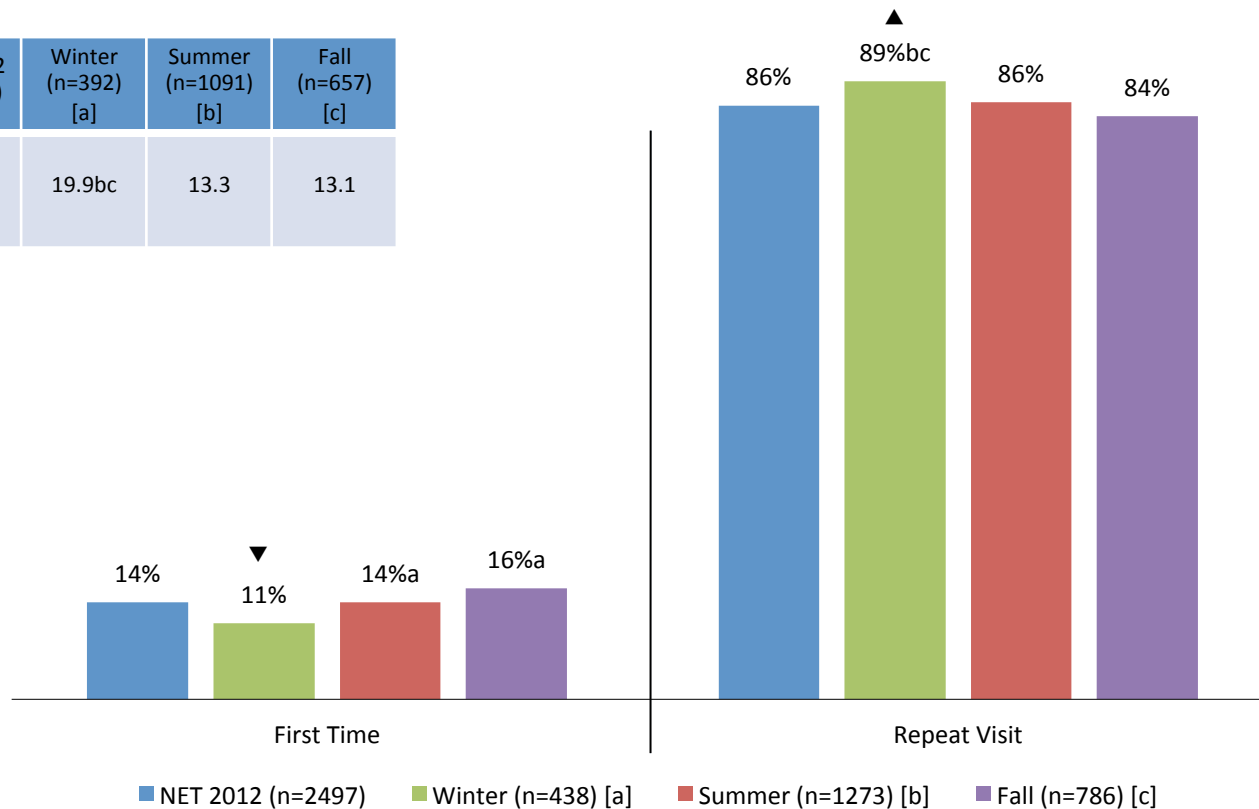
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Repeat versus First Time Visitors by Season

- 2012 saw a greater proportion of repeat visitors during the Winter season, as compared to the Fall and Summer seasons. The proportion of repeat visitors during the Winter is also higher than in 2011.

Overnight Visitors	NET 2012 (n=2139)	Winter (n=392) [a]	Summer (n=1091) [b]	Fall (n=657) [c]
Average number of trips to Maine in past 5 years	14.5	19.9bc	13.3	13.1



Regional Q9. Was this your first visit in Maine?

Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Reasons for Selecting Maine

- Maine's *beautiful scenery, relaxing atmosphere, and coastline* are among the top reasons travelers decided to visit Maine.
- Leisure travelers are more likely to list several reasons for selecting Maine.

	NET 2012 (n=2497)	Leisure (n=1366) [a]	VFR (n=813) [b]	Business (n=318) [c]
Beautiful scenery	52%	61%bc	46%c	28%
Relaxing atmosphere	47%	54%bc	45%c	22%
Enjoy the coastline	47%	57%bc	40%c	22%
Easy to get to	38%	47%bc	31%c	19%
Good food	35%	39%bc	31%c	24%
Affordable	34%	41%bc	28%c	18%
Good accommodations	28%	34%bc	19%	21%
Lots to do	26%	30%bc	23%	18%
Outdoor recreation options	26%	30%bc	25%c	13%
What I am familiar with/It's tradition	25%	28%c	27%c	8%
Interesting attractions	22%	27%bc	17%	16%
To view the mountains and wildlife	20%	23%c	20%c	11%
It's different from other places	14%	16%c	13%	9%
Have a summer home/timeshare/place to stay there	13%	10%	20%ac	7%
Interesting history/culture	12%	12%	11%	11%
Location of special event (such as festival, wedding, graduation, summer camp)	11%	7%	16%a	15%a
Work related trip	9%	2%	2%	59%ab
It was recommended to me	9%	10%b	7%	12%b
Other	14%	8%	24%ac	9%

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

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

Reasons for Selecting Maine

- Summer and Fall visitors are more likely than Winter visitors to mention *beautiful scenery, enjoying the coastline, and outdoor recreation options* as reasons they selected Maine for their vacation destination.

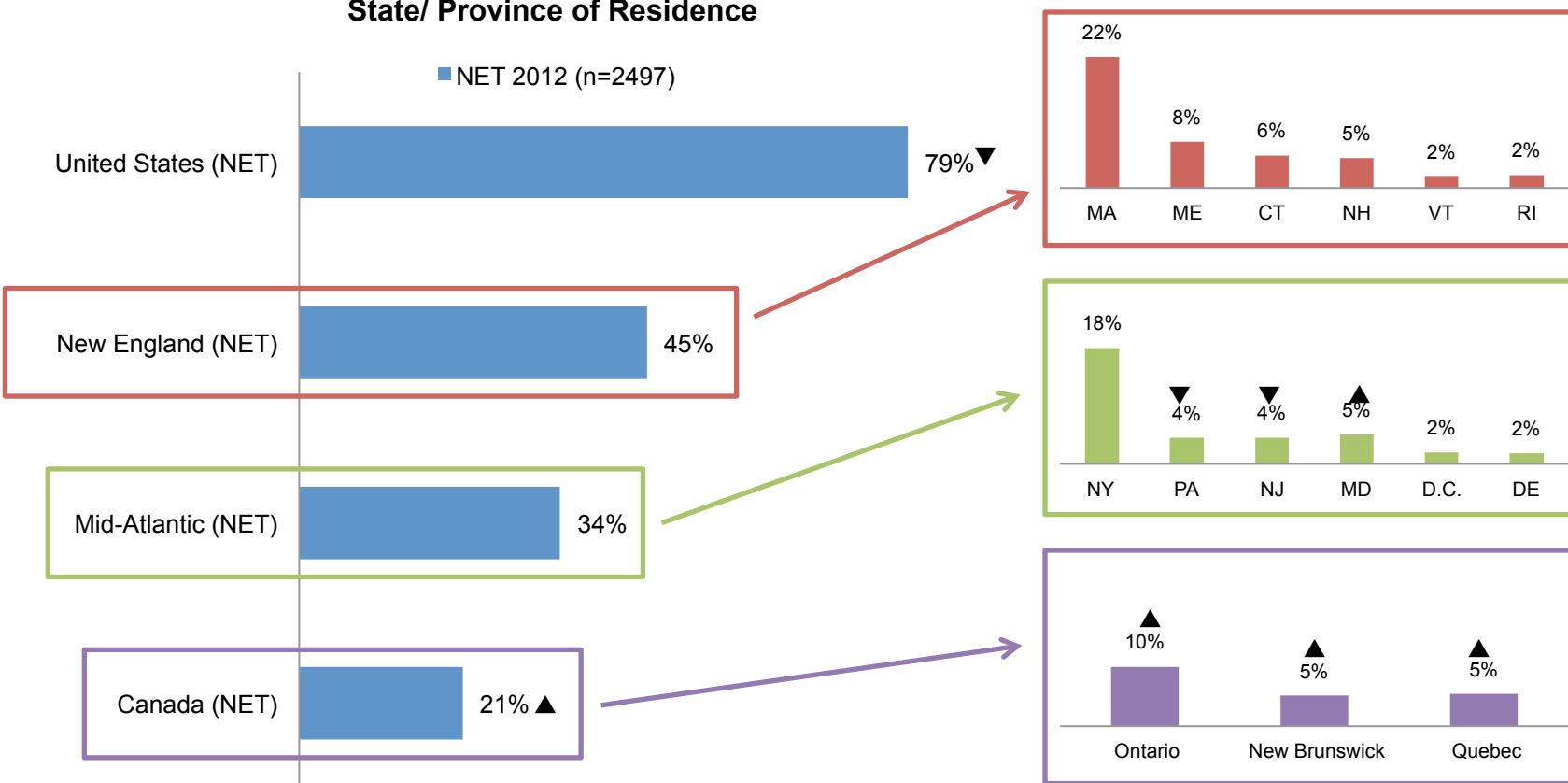
	NET 2012 (n=2497)	Winter (n=438) [a]	Summer (n=1273) [b]	Fall (n=786) [c]	Paid Accommodations (n=1685) [d]	Unpaid Accommodations (n=812) [e]
Beautiful scenery	52%	45%	52%a	55%a	52%	50%
Relaxing atmosphere	47%	45%	48%	47%	47%	48%
Enjoy the coastline	47%	40%	50%a	46%a	50%e	41%
Easy to get to	38%	37%	38%	39%	39%	36%
Good food	35%	33%	36%	33%	35%	33%
Affordable	34%	37%b	32%	35%	34%	34%
Good accommodations	28%	28%	28%	27%	32%e	18%
Lots to do	26%	23%	27%	27%	27%	24%
Outdoor recreation options	26%	22%	27%a	29%a	25%	30%d
What I am familiar with/It's tradition	25%	27%	26%	23%	23%	29%d
Interesting attractions	22%	20%	20%	27%ab	25%e	17%
To view the mountains and wildlife	20%	20%	20%	22%	20%	21%
It's different from other places	14%	13%	14%	14%	14%	13%
Have a summer home/ timeshare/ place to stay there	13%	14%	14%	11%	5%	30%d
Interesting history/culture	12%	10%	11%	13%	12%	10%
Location of special event (such as festival, wedding, graduation, summer camp)	11%	12%	11%	11%	10%	13%
Work related trip	9%	13%b	8%	10%	11%e	6%
It was recommended to me	9%	7%	10%a	10%	11%e	6%
Other	14%	16%	14%	12%	11%	19%d

Regional Q16. Thinking about all the places you could have chosen to visit on this trip, why did you choose Maine?
a, b, c indicates significant difference at the 95% confidence level

Residence of Maine Overnight Visitors

- Massachusetts and New York continue to source the greatest percentage of overnight visitors to Maine, each representing approximately one-fifth of overnight visitors to the State.
- Comparing 2012 to 2011, there were significant increases in the percentage of overnight visitors from Canada, specifically during the Summer season. Though visitation from Pennsylvania had shown an increase from 2010 to 2011, it appears as though 2012 visitation has retreated back to levels seen in 2010.

State/ Province of Residence



State/ Province of Residence

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Residence of Maine Overnight Visitors

- Travelers from Massachusetts, New Brunswick, or Quebec are more likely to be on a leisure trip, while travelers from Pennsylvania, Maryland, or Ontario are more likely to be in Maine on business.
- The Fall season appears to draw in travelers from Washington DC and Delaware.

	NET 2012 (n=2497)	Leisure (n=1366) [a]	VFR (n=813) [b]	Business (n=318) [c]	Winter (n=438) [d]	Summer (n=1273) [e]	Fall (n=786) [f]
United States (NET)	79% ▼	74%	88% ^{ac}	75%	85% ^{ef}	75%	81% ^e
New England (NET)	45%	43%	52%	35%	53%	41%	46%
MA	22%	22% ^c	26% ^c	14%	26%	21%	22%
ME	8%	7%	9%	8%	11% ^e	6%	9%
CT	6%	6%	5%	7%	6%	5%	5%
NH	5%	5%	6%	3%	4%	5%	6%
VT	2%	2%	3%	1%	3%	2%	1%
RI	2%	2%	3%	2%	3%	2%	2%
Mid-Atlantic (NET)	34%	31%	37%	40%	32%	34%	35%
NY	18%	17%	19%	20%	17%	20%	16%
PA	4% ▼	3%	4%	8% ^{ab}	7% ^{ef}	4%	2%
NJ	4% ▼	4%	5%	3%	5%	3%	5%
MD	5% ▲	4%	5%	8% ^{ab}	3%	5% ^d	5% ^d
Washington, DC	2%	2%	2%	0%	<1%	1%	4% ^{de}
DE	2%	2%	2%	<1%	<1%	1%	3% ^{de}
Canada (NET)	21% ▲	26% ^b	12%	25% ^b	15%	25% ^{df}	19% ^d
Ontario	10% ▲	9%	9%	18% ^{ab}	7%	13% ^{df}	7%
New Brunswick	5% ▲	8% ^{bc}	1%	3%	7% ^e	5%	5%
Quebec	5% ▲	8% ^{bc}	2%	5%	1%	7% ^a	6% ^a

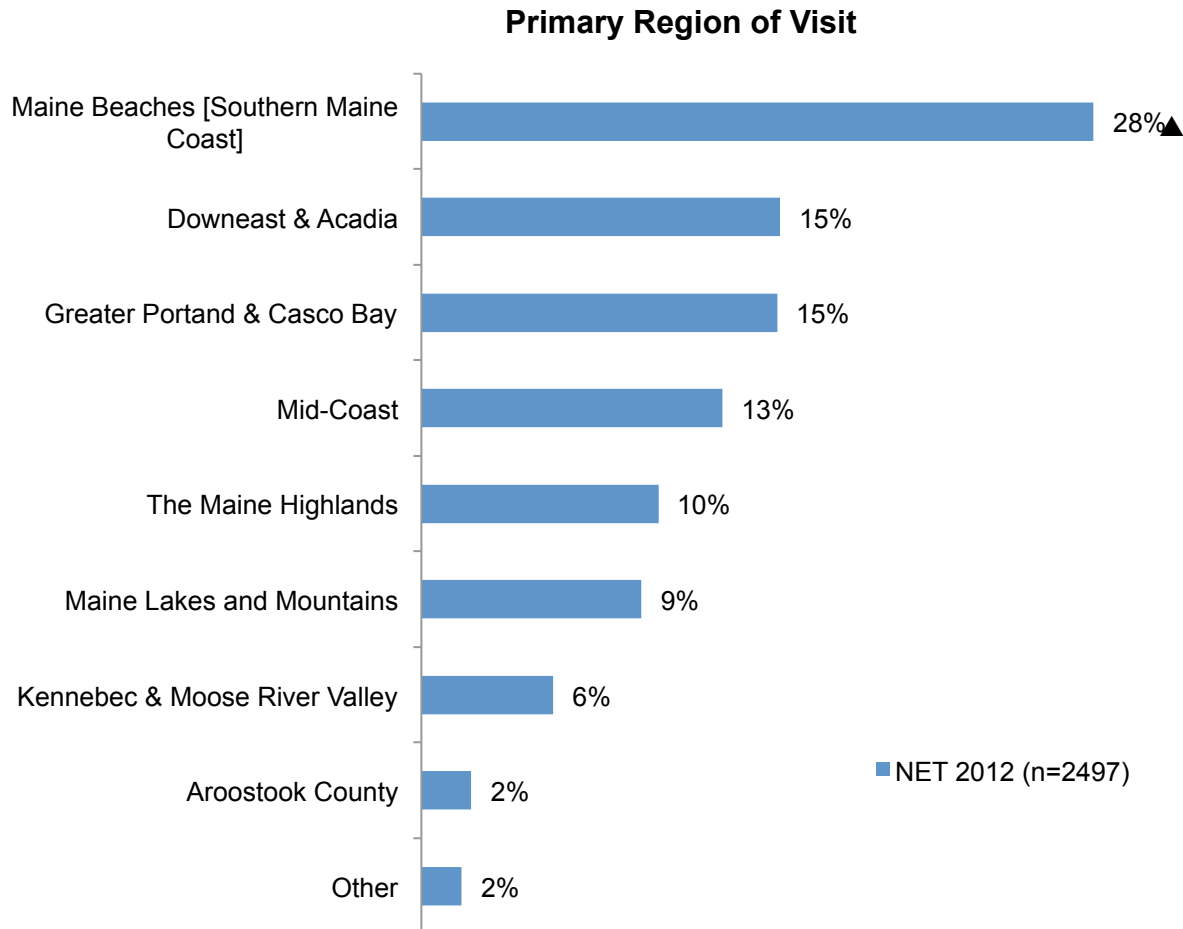
State/ Province of Residence

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Primary Region of Visit to Maine

- The Maine Beaches, Greater Portland, and the Downeast & Acadia regions remain the most widely visited regions in Maine.
- The Maine Beaches experienced an increase in visitation over 2011, primarily driven by an increase during the Winter season.



Regional Q28. What region in Maine was your primary destination?

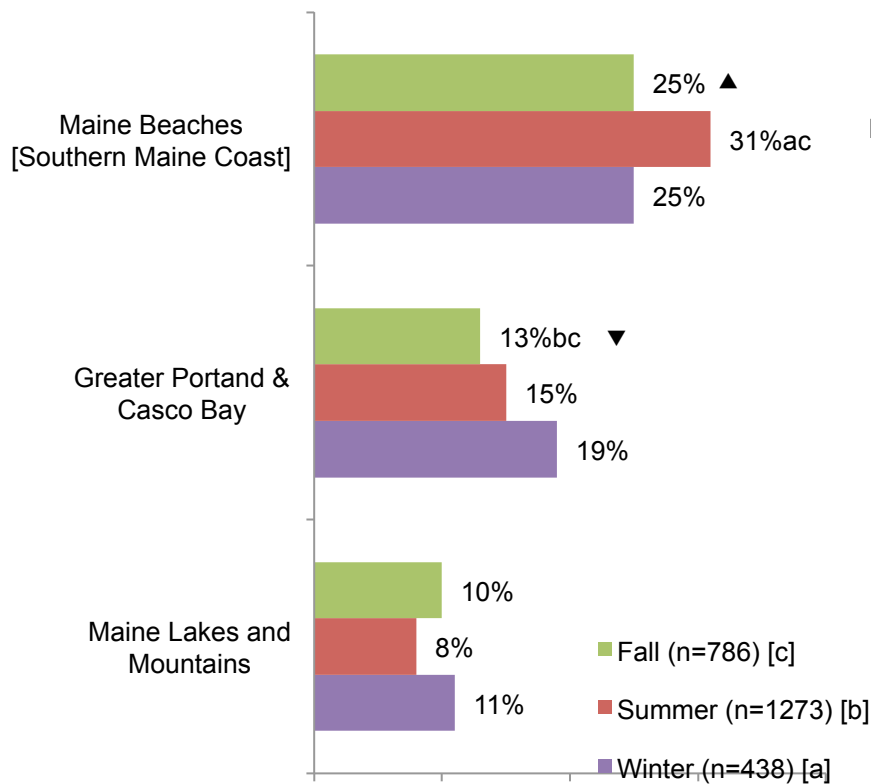
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

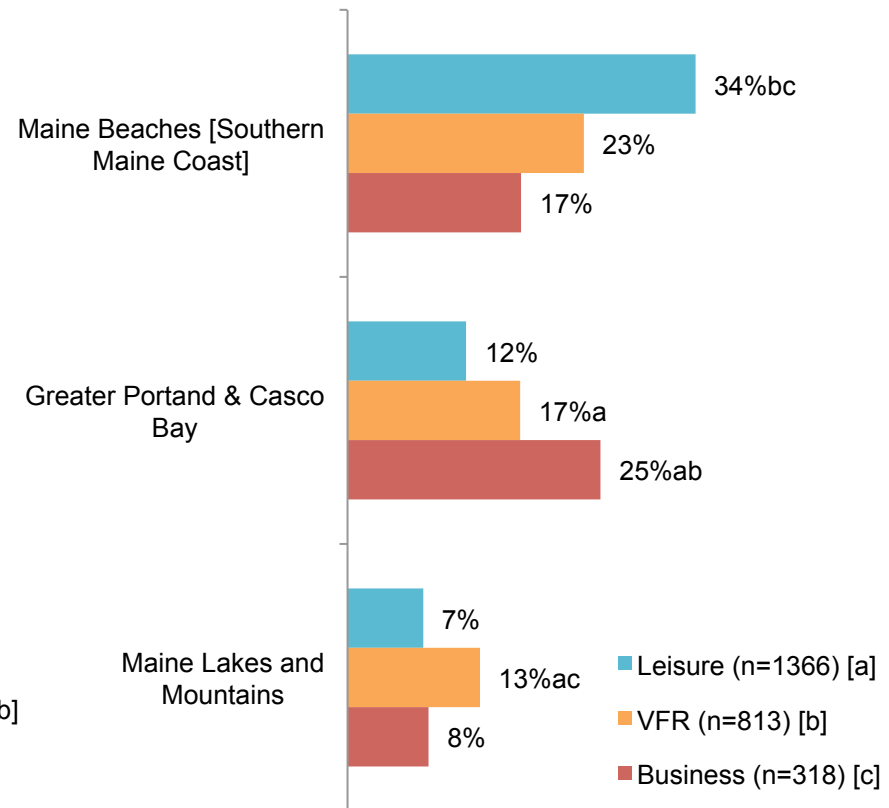
Primary Region of Visit to Maine

- Seasonal and trip type variations can be seen in some of the primary regions visited, with Summer travelers more likely to be visiting the Maine Beaches/Southern Maine Coast and Fall travelers more likely to be visiting Greater Portland & Casco Bay.
- Business travelers are more apt to be visiting the Greater Portland & Casco Bay region, with leisure visitors traveling through the Maine Beaches region.

Region by Season



Region by Trip Type



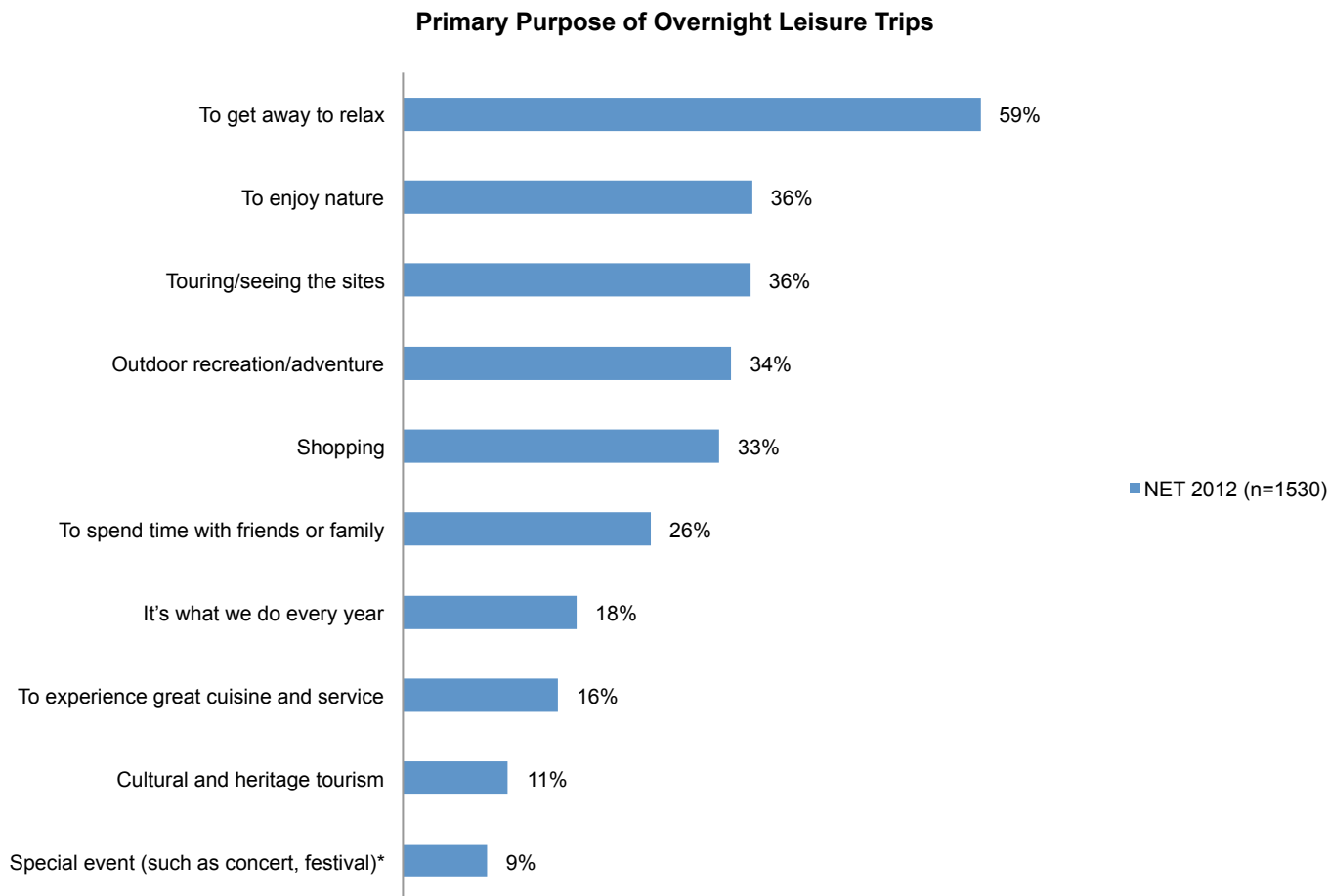
Regional Q28. What region in Maine was your primary destination?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Primary Purpose of Overnight Leisure Trips

- Two-fifths of overnight leisure visitors to Maine reported that *getting away to relax* was the primary purpose of their visit, making this the most widely-cited primary trip purpose for the State. *Enjoying nature, touring/seeing the sites, outdoor recreation, and shopping* were each mentioned by one-third of overnight visitors.



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

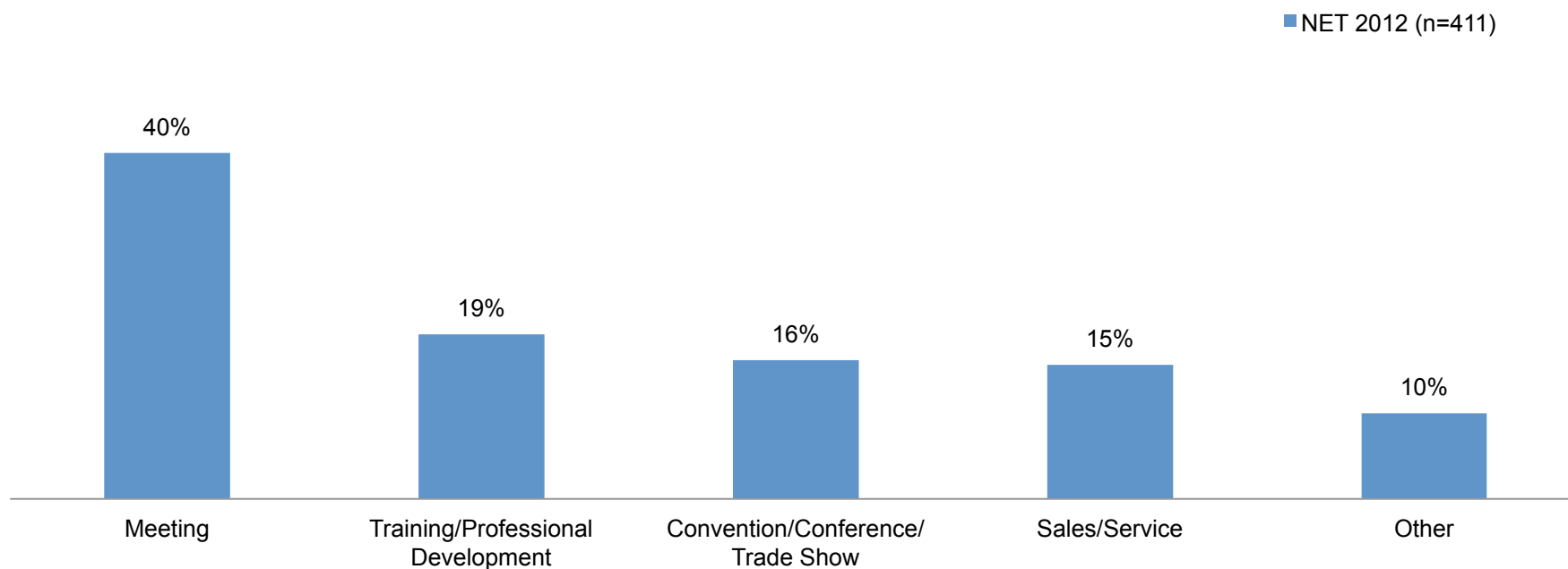
*Includes Wedding before 06/2012. Due to the revision in answer options in 2012, direct comparisons between 2011 and 2012 data can not be made.

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

Primary Purpose of Overnight Business Trips

- More than one-third of business travelers to Maine reported that a meeting was the primary purpose of their trip. This was followed by training/professional development.

Primary Purpose of Overnight Business Trips

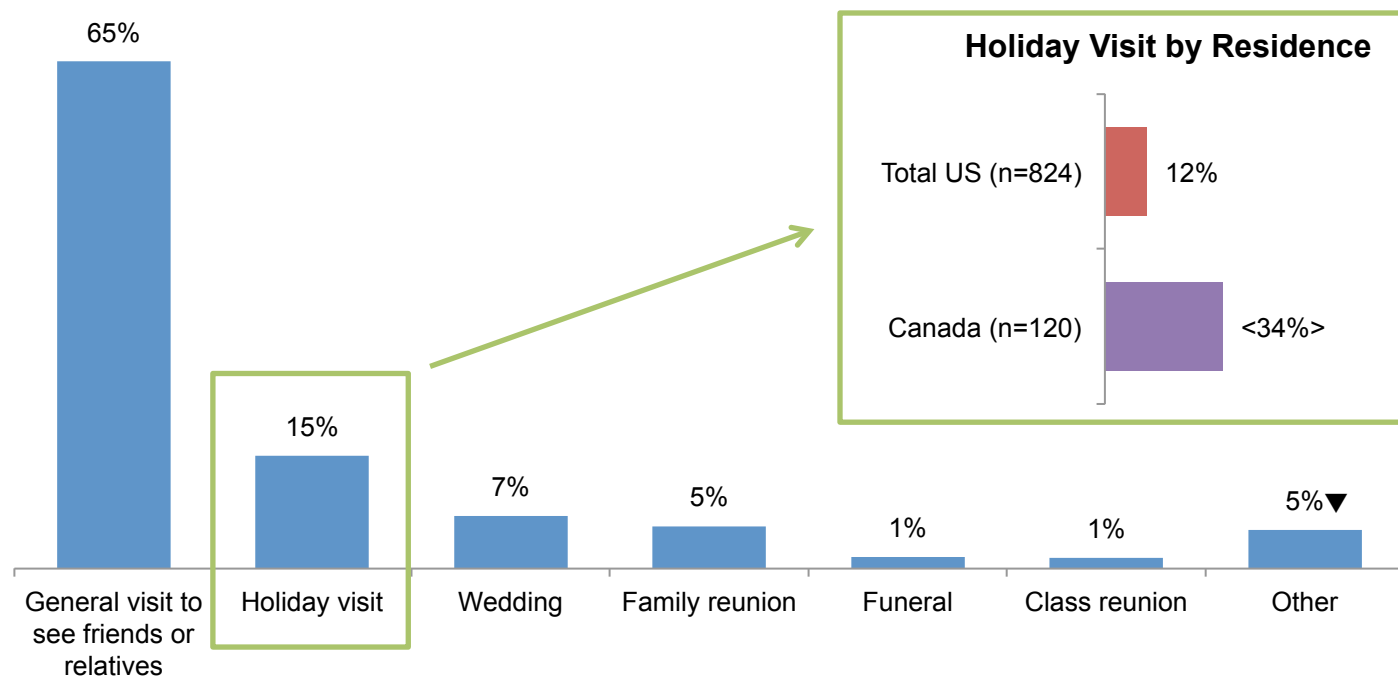


Primary Purpose of Overnight VFR Trips

- Two-thirds of travelers visiting friends/relatives reported that the primary purpose of their trip to Maine was a general visit to see friends or relatives. As expected, this was overwhelmingly the most widely-cited purpose of these trips.
- VFR travelers from Canada are more likely than those from other areas to have come to Maine for a holiday visit.

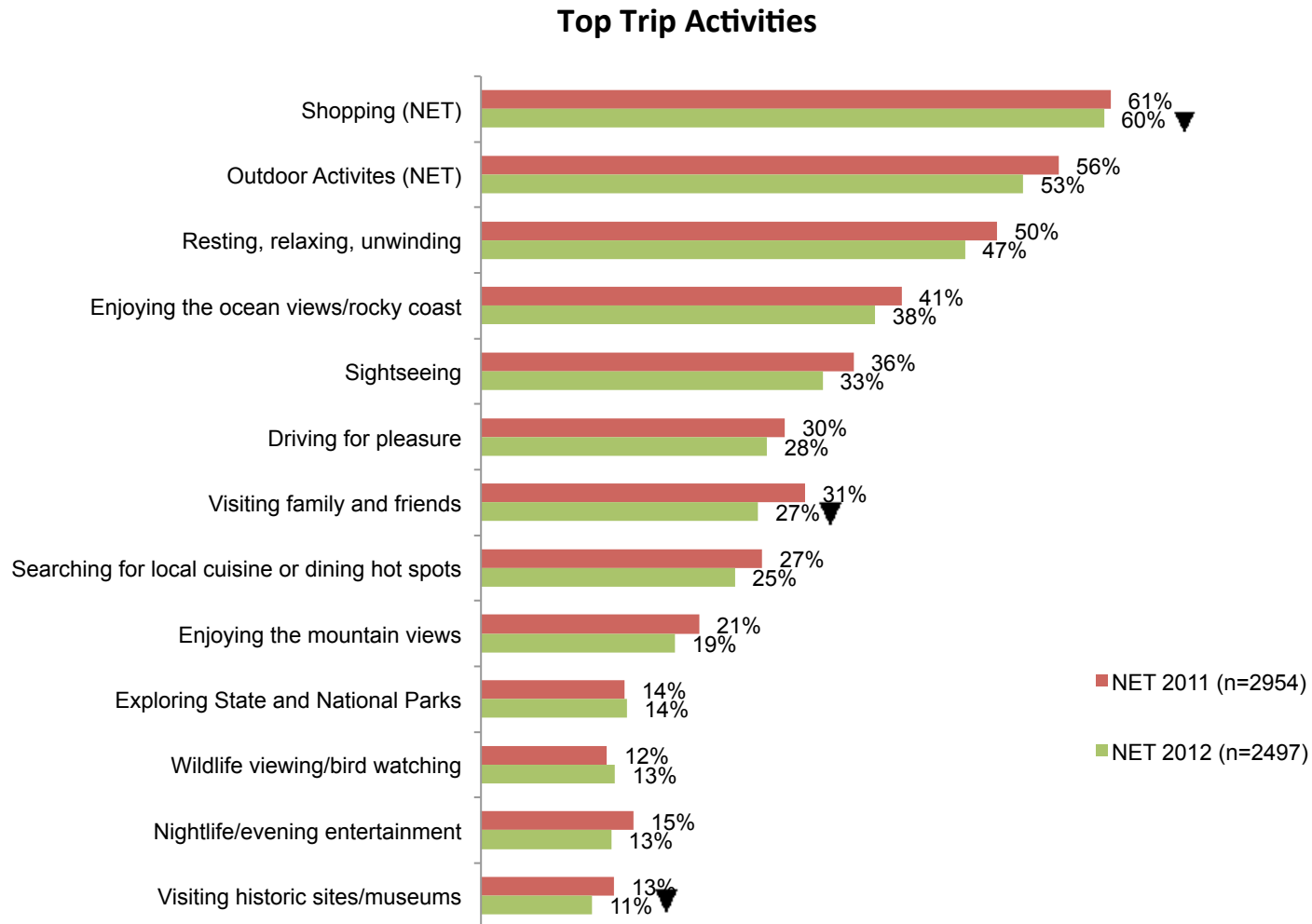
Primary Purpose of Overnight VFR Trips

■ NET 2012 (n=944)



Top Trip Activities

- *Shopping and outdoor activities* are the top trip activities among overnight visitors to Maine, enjoyed by more than half of this group while they are in the state. Half of visitors reported spending time *resting, relaxing, and unwinding* while in Maine.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Top Trip Activities

- Repeat visitors to Maine are more likely than first-time visitors to *shop, rest and relax, and drive for pleasure* while in Maine.

	NET 2012 (n=635)	First Time Visitor (n=357)	Repeat Visitor (n=2139)	Paid Accommodations (n=1685)	Unpaid Accommodations (n=812)
Shopping (NET)	60%▼	50%	<62%>	<64%>	53%
Outdoor Activities (NET)	53%	57%	52%	52%	55%
Resting, relaxing, unwinding	47%	35%▼	<49%>	45%	<51%>
Enjoying the ocean views/rocky coast	38%	38%▼	38%	<40%>	34%
Sightseeing	33%	37%	33%	<36%>	26%▼
Driving for pleasure	28%	22%	<29%>▼	<30%>	24%
Visiting family and friends	27%▼	13%	<29%>	14%▼	<53%>
Searching for local cuisine or dining hot spots	25%	24%	25%	<26%>▼	21%
Enjoying the mountain views	19%	22%	18%	19%	18%
Exploring State and National Parks	14%	17%	14%	<15%>	11%
Wildlife viewing/bird watching	13%	16%	12%	13%	13%
Nightlife/evening entertainment	13%	16%	12%▼	13%	12%▼
Visiting historic sites/museums	11%▼	<14%>▼	10%	<12%>	8%▼

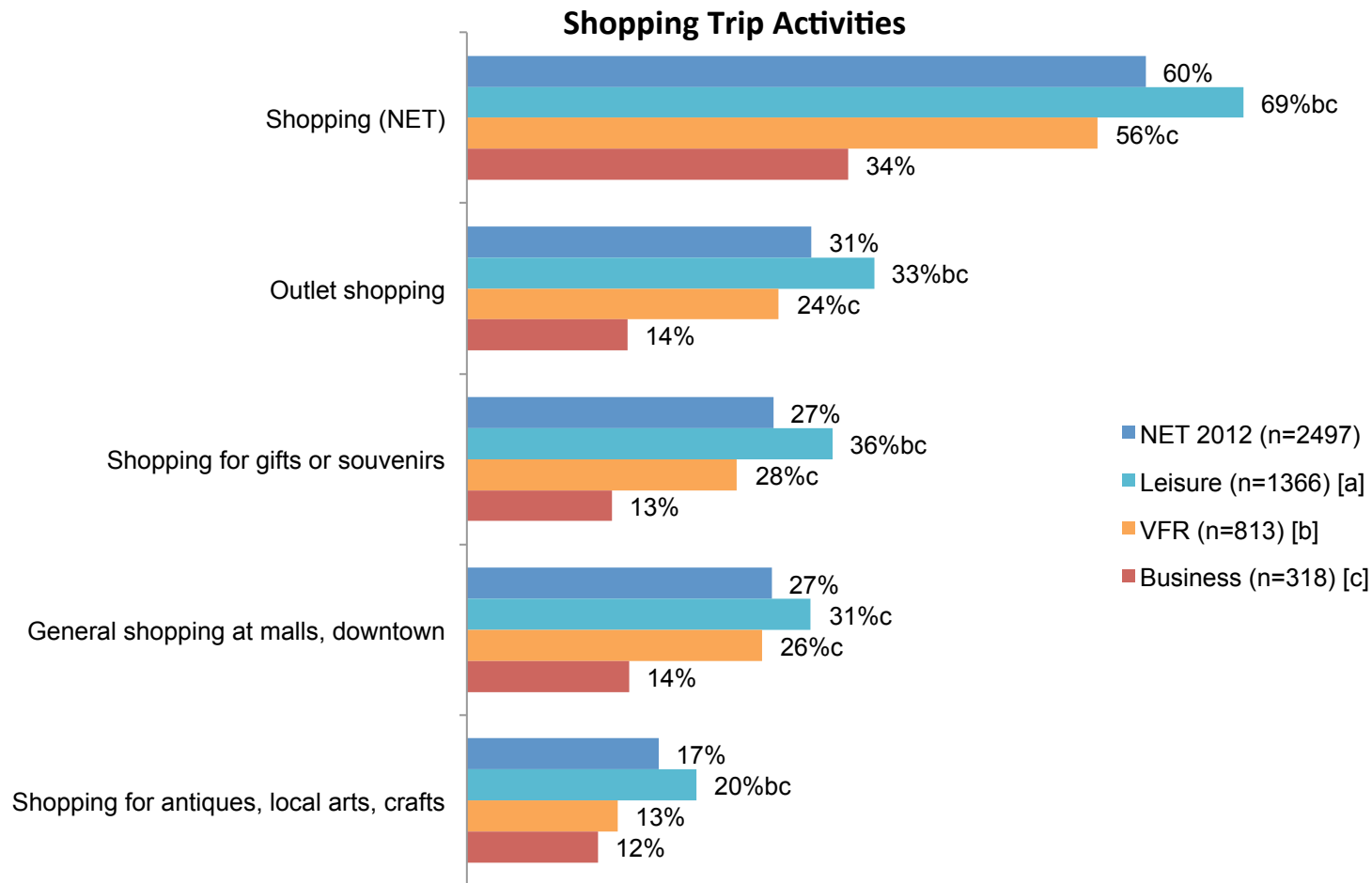
Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Shopping Activities

- Leisure and VFR travelers are most likely to shop while visiting Maine, significantly more so than business travelers. Overall, shopping for gifts and souvenirs showed a decrease from 2011 (31%), returning to levels previously seen in 2010.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)

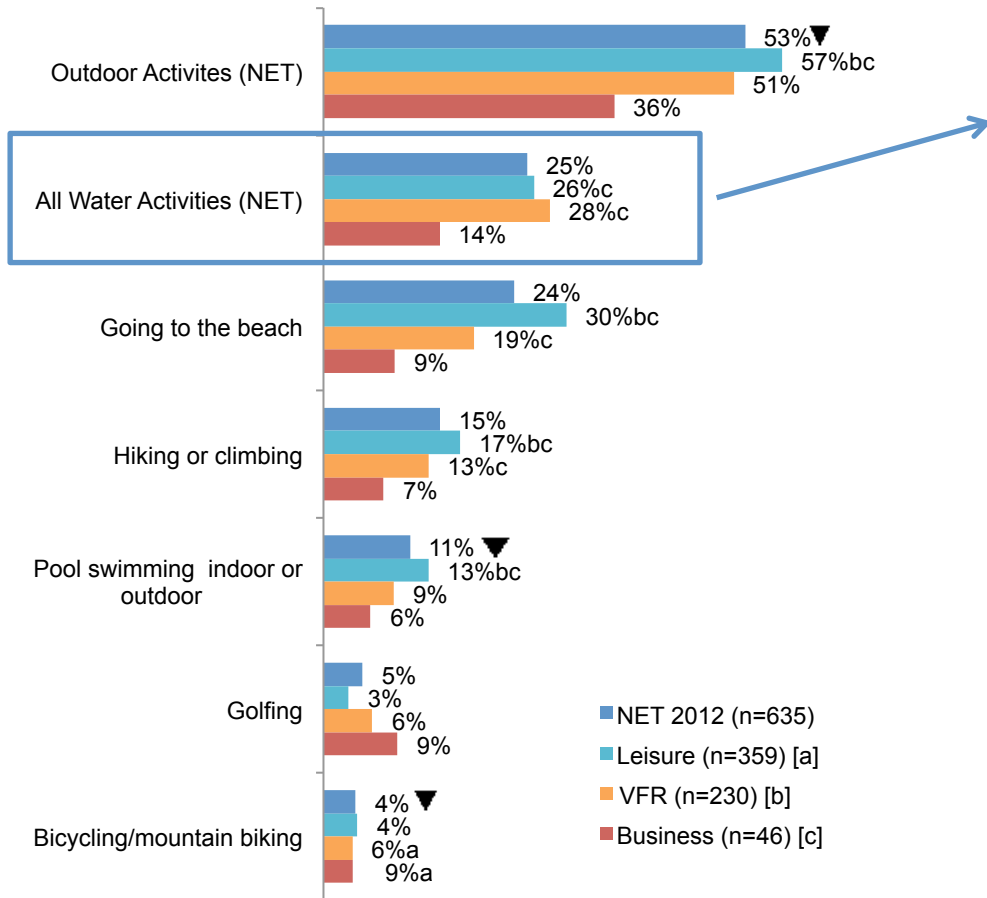
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

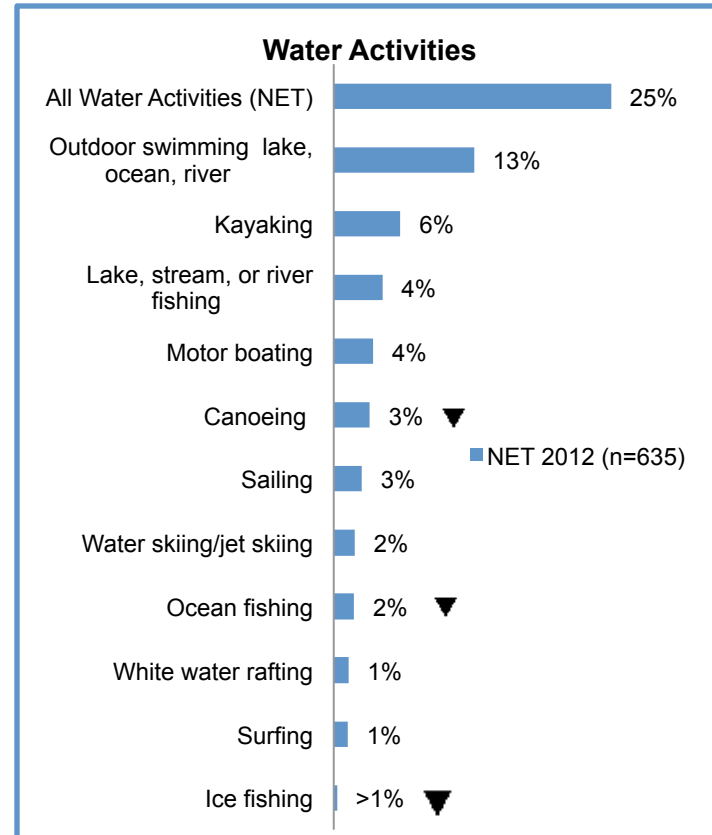
Outdoor Activities

- Overnight visitors to Maine in 2012 enjoyed a variety of outdoor activities, with many enjoying various water activities or hiking/climbing activities.

Outdoor Trip Activities



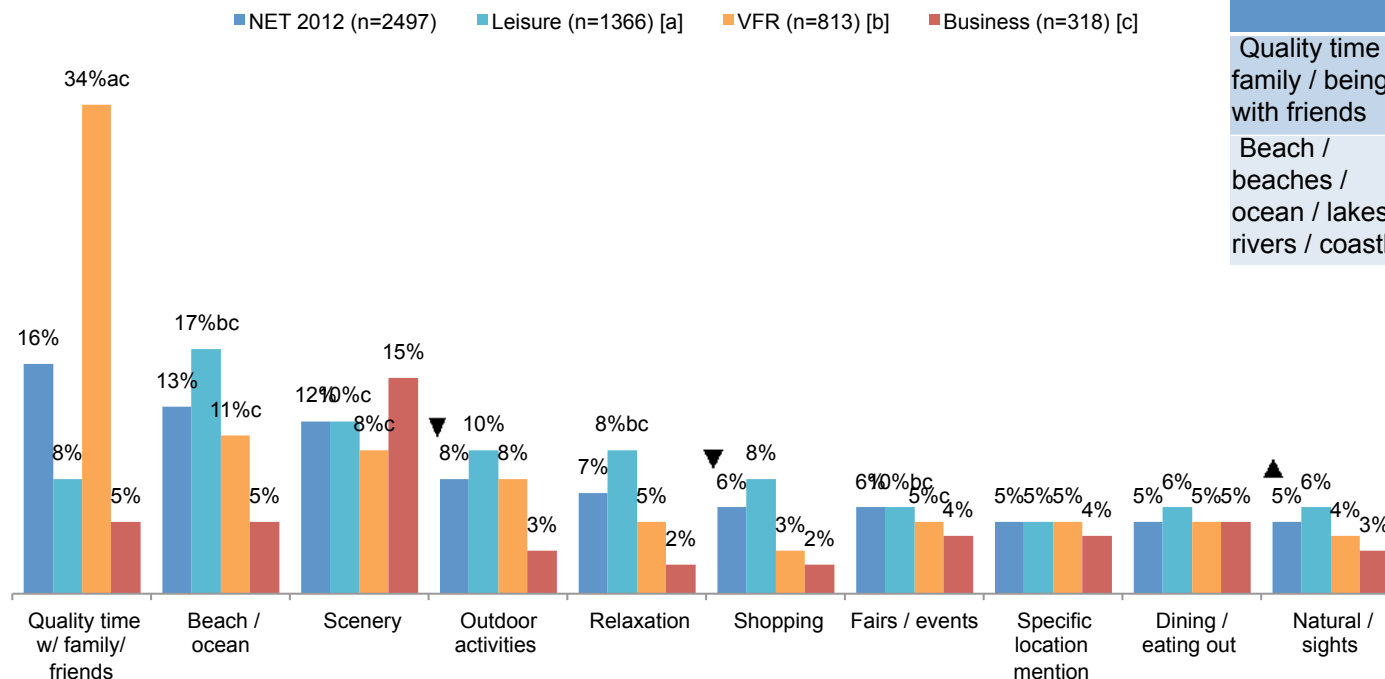
Water Activities



Highlight of Overnight Trip to Maine

- Visitors recall a variety of highlights of their trip to the state. The chart below illustrates those highlights mentioned by at least 5% of travelers. Notably, significant year-over-year decreases were reported in the percent of overnight visitors to Maine who felt that *outdoor activities* or *shopping* was the highlight of their trip.
- Differences can be seen based on the type of trip taken to Maine. Examples include: VFR travelers being more likely to mention *quality time with family/friends* as the highlight of their trip and leisure travelers being more likely to cite *beach/ocean* and *relaxation*.

Highlight of Overnight Trip to Maine



	Winter (n=438) [a]	Summer (n=1273) [b]	Fall (n=786) [c]
Quality time with family / being with friends	20% ^{bc}	16%	15%
Beach / beaches / ocean / lakes / rivers / coastline	8%	16% ^{ac}	12%

Regional Q35. What was the highlight of this specific trip to Maine?

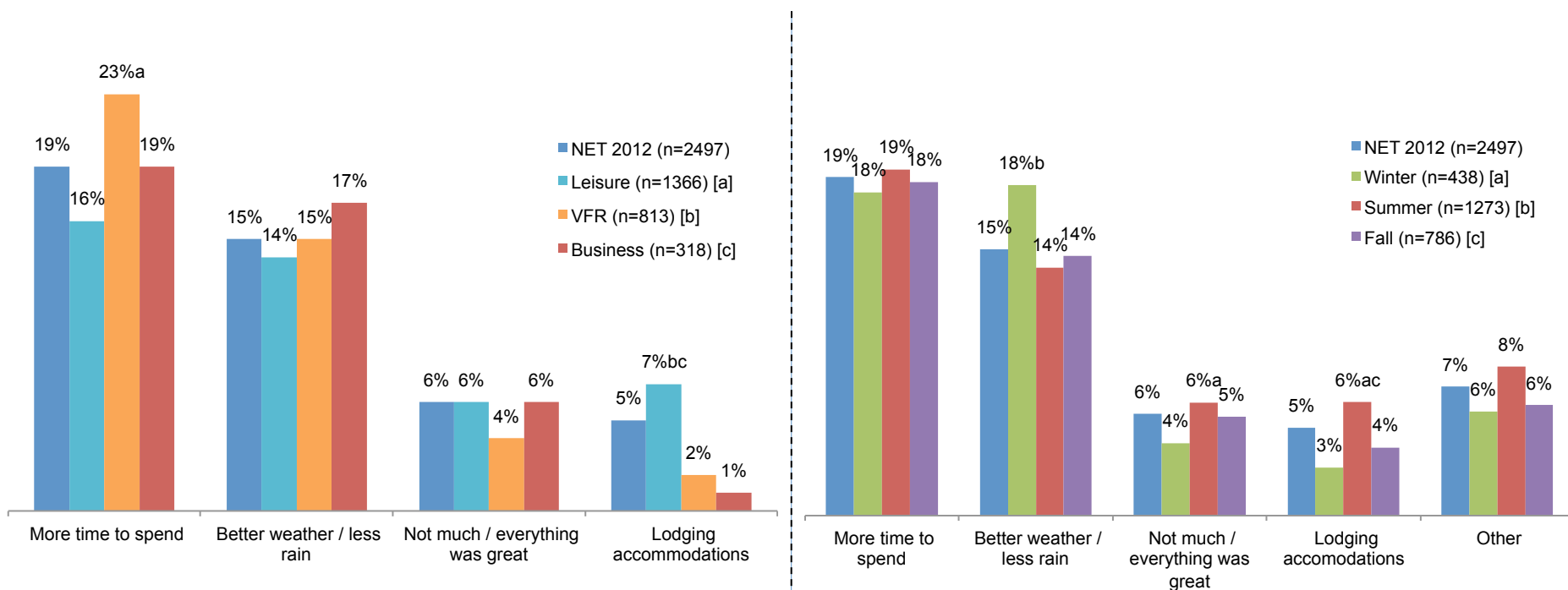
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Aspects of Trip That Could Have Been Better

- One-fifth of Maine visitors listed *having more time to spend* as an item that could have been better on their trip to Maine. *Better weather/less rain* continues to be one of the top cited aspects of vacation that could have been better, though fewer leisure visitors mentioned this in 2012 than in 2011.
- Though only mentioned by 5% of travelers, lodging accommodations was a concern, more so among Summer visitors.

Top Aspects That Could Have Been Better on Overnight Trip in Maine- By Trip Type & Season

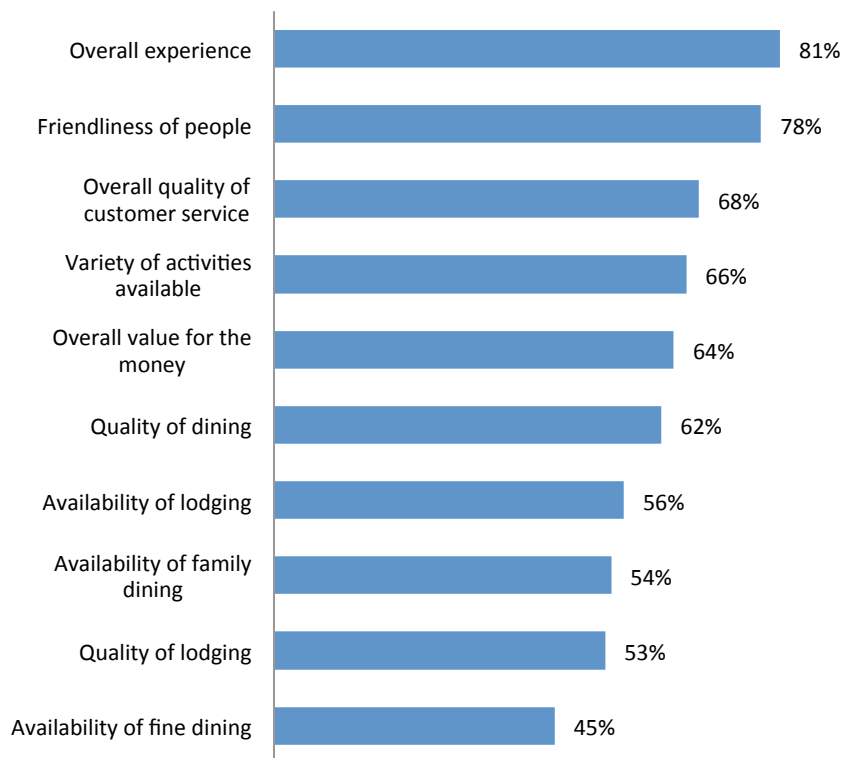


Comparison of Maine to Other Destinations

- Maine continues to rate favorably against other destinations on a number of attributes, with virtually no change in these ratings between 2011 and 2012. One exception is in the *availability of lodging* which received a higher rating in 2012 than it had in 2011.

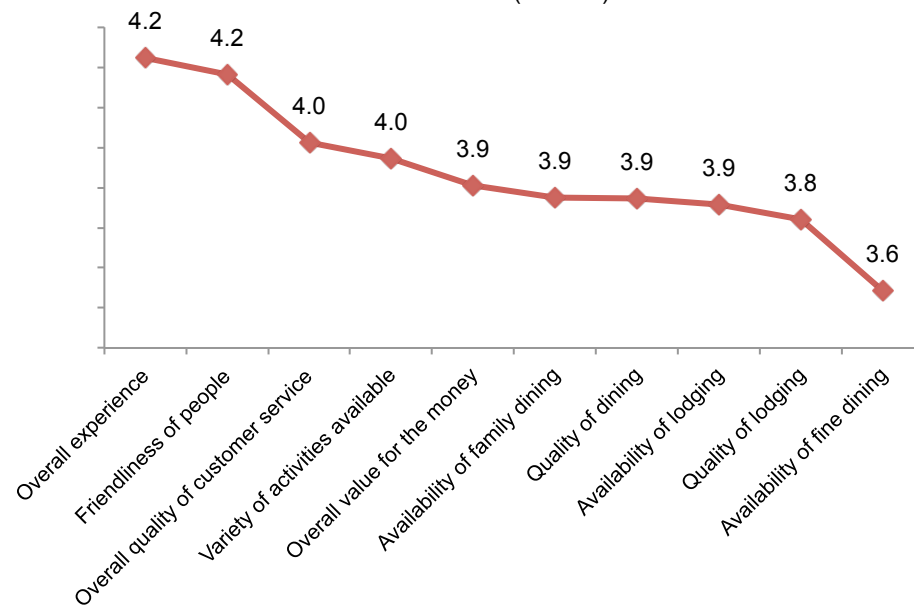
**Top Two Box Summary:
Maine was one of the best/better than most**

■ NET 2012 (n=2497)



**Mean Rating
(5-point scale)**

◆ NET 2012 (n=2497)



Phrases that Best Describe Maine – Top Descriptors

- There were significant year-over-year changes in the percent of overnight visitors who used some of the following phrases to describe Maine, though most appear to be drops that have returned to levels reported in earlier years (2008-2010). *Fresh air*, however, was selected by significantly fewer travelers in 2012 than it had been in 2008-2011.
- Importantly, the proportion selecting the phrase *great beaches* to describe Maine is higher in 2012 than in any of the previous four years (2008-2011).

	NET 2012 (n=2497)	Leisure (n=1366) (a)	VFR (n=813) (b)	Business (n=318) (c)
Beautiful scenery	70%▼	74%bc	69%c▼	59%▼
Fresh air	62%▼	63%▼	64%c▼	56%
Great place to relax and unwind	62%▼	67%bc	61%c▼	46%▼
Good food/restaurants	52%▼	56%bc	48%	46%
Clean water (lakes, rivers, ocean)	50%▼	51%c▼	54%c▼	39%▼
Great place to escape from my daily routine	49%▼	53%c	48%c	32%
Great vacation destination for the whole family	47%	49%c	49%c	34%
Great summer outdoor recreation activities	45%	44%c	51%ac	31%
Clean beaches	45%	47%c	44%c	35%
Great beaches	42%▲	44%c	44%c	32%
Unspoiled environment	41%▼	39%	45%a	37%

Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Phrases that Best Describe Maine – Lowest Descriptors

- The phrases that are less often used to describe Maine by overnight visitors also saw the same pattern as those used more often, with some significant drops but most returning to prior years' levels. Exceptions to this include *interesting historic sites* and *cold*, which were both selected by fewer travelers in 2012 than in any of the prior four years (2008-2011).

	NET 2012 (n=2497)	Leisure (n=1366) (a)	VFR (n=813) (b)	Business (n=318) (c)
Place for a quick getaway	39%▼	43%bc	35%	28%
Great value for my money	39%	42%bc	36%	30%
Great shopping opportunities	38%	42%bc	34%c	26%
Offers many things to do	36%	37%c	38%c	27%
Lots of wildlife	36%	34%	39%▼	36%
Romantic getaway	25%▼	27%c	25%	20%
Fine dining	24%	25%	23%	25%
Great winter outdoor recreation activities	21%▼	19%	26%ac▼	17%
Interesting historic sites	21%▼	20%	22%	18%▼
Place I long to go to	19%	21%c	19%	13%
High quality lodging	19%	22%bc	15%	14%
Interesting cultural activities	14%	14%	14%	16%
Cold	11%▼	9%	12%▼	12%
Offers exciting nightlife and entertainment	5%▼	5%	5%	5%
Not enough to do	2%	2%	3%	3%
Too primitive	1%	1%	2%a	1%
Boring	1%	1%	1%	2%

Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

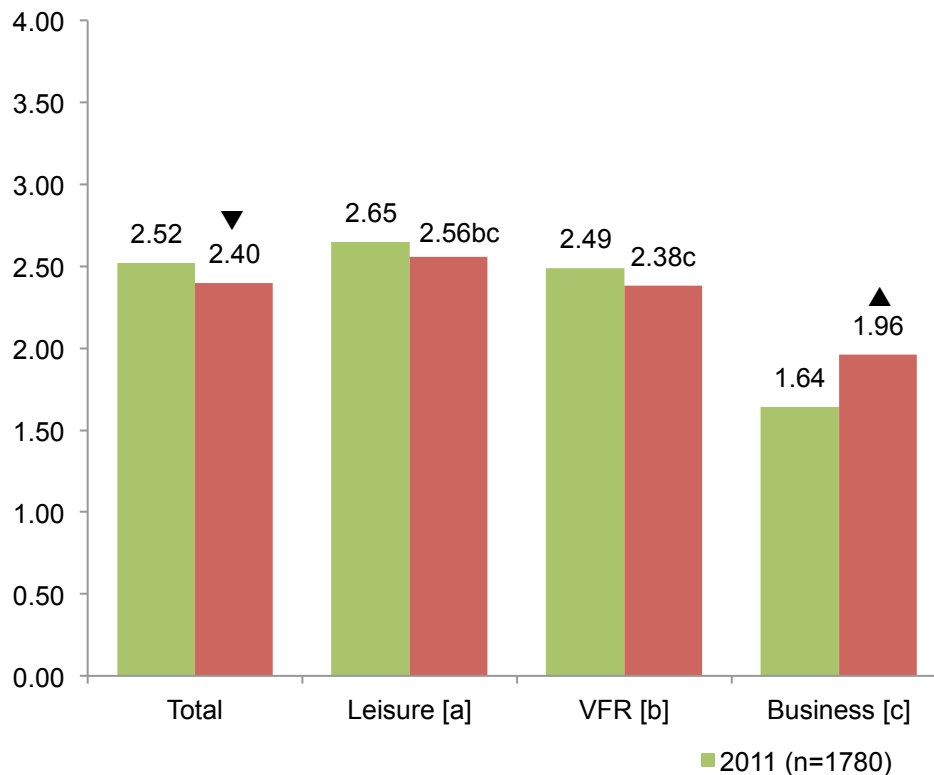
Day Visitor Travel Logistics



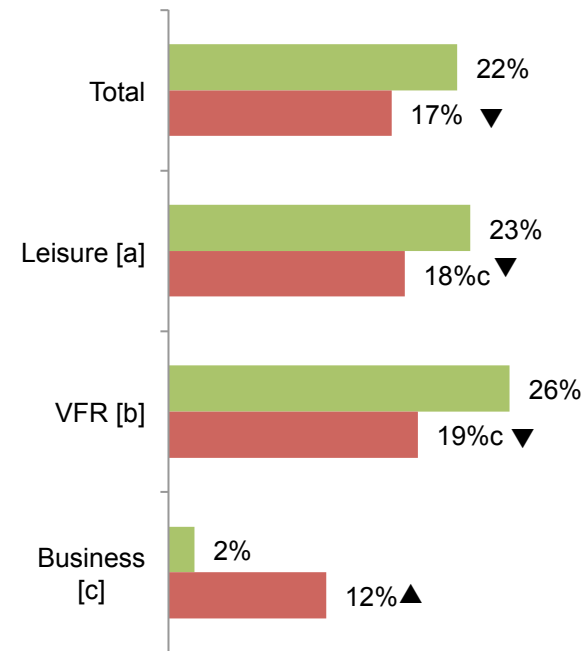
Travel Party Size and Composition

- Overall day traveler party size appears to have dropped somewhat since 2011 in all travel categories except for business travel.
- Interestingly, business travelers showed an *increase* in traveling with children, while all other types of travelers showed a *decrease* in the proportion traveling with children.

Mean Number of People in Travel Party



Percent Traveling with Children



Day Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Day Q8. How many of these people were: Children?

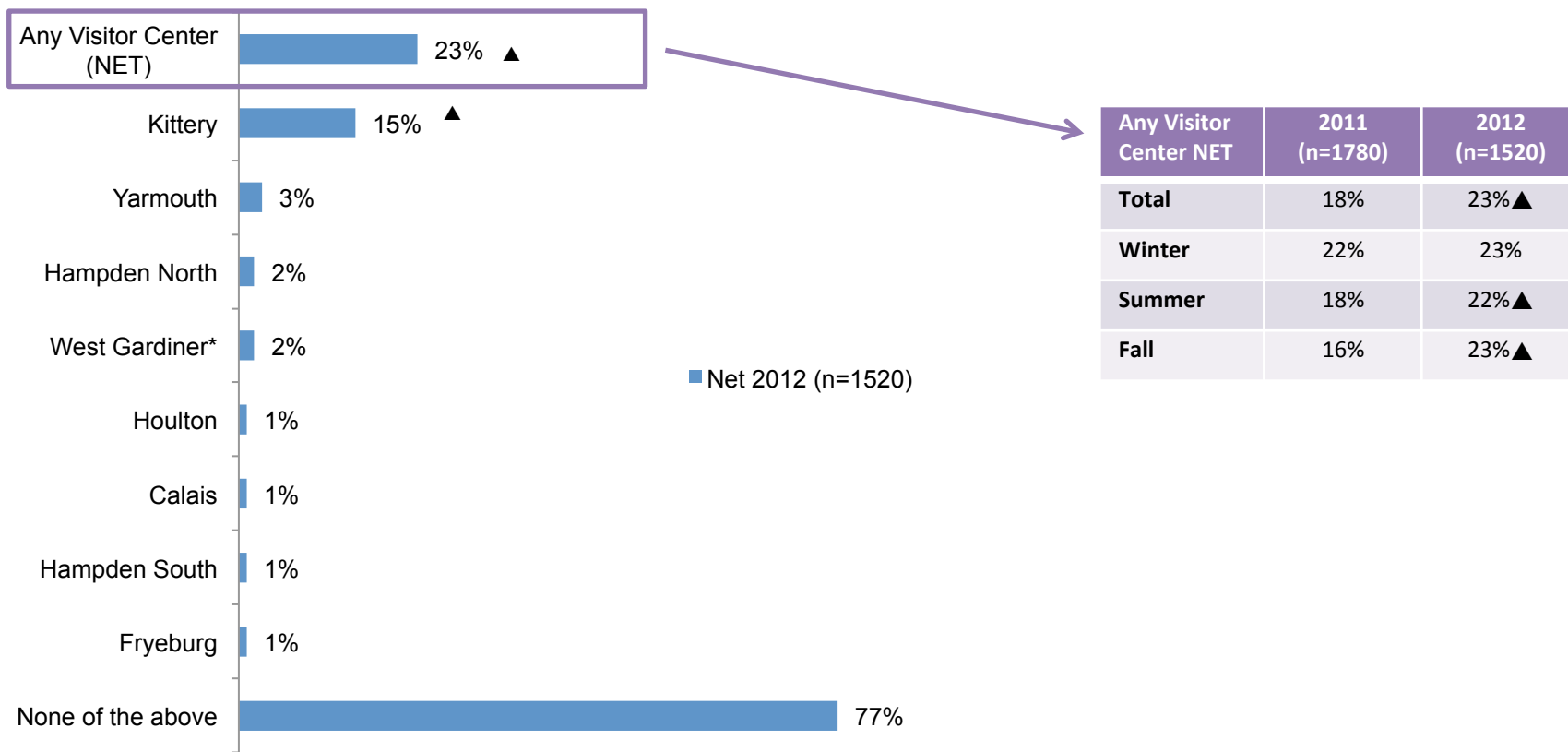
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Visitor Center Usage While in Maine

- One-fourth of day visitors to Maine stopped at a Maine Visitor Center while in the State, about the same proportion as overnight visitors. This represents an increase over 2011, when one-fifth of day visitors stopped at a Visitor Center. The Kittery Center appears to be the main driver of this 2011-2012 increase, as do the Summer and Fall seasons.

Visitor Centers Stopped into by Total Travelers**



Day Q12a. Once you arrived in Maine did you stop at any of the Maine Visitor Centers?

*Note: Added Summer 2010. **Start Summer 2009.

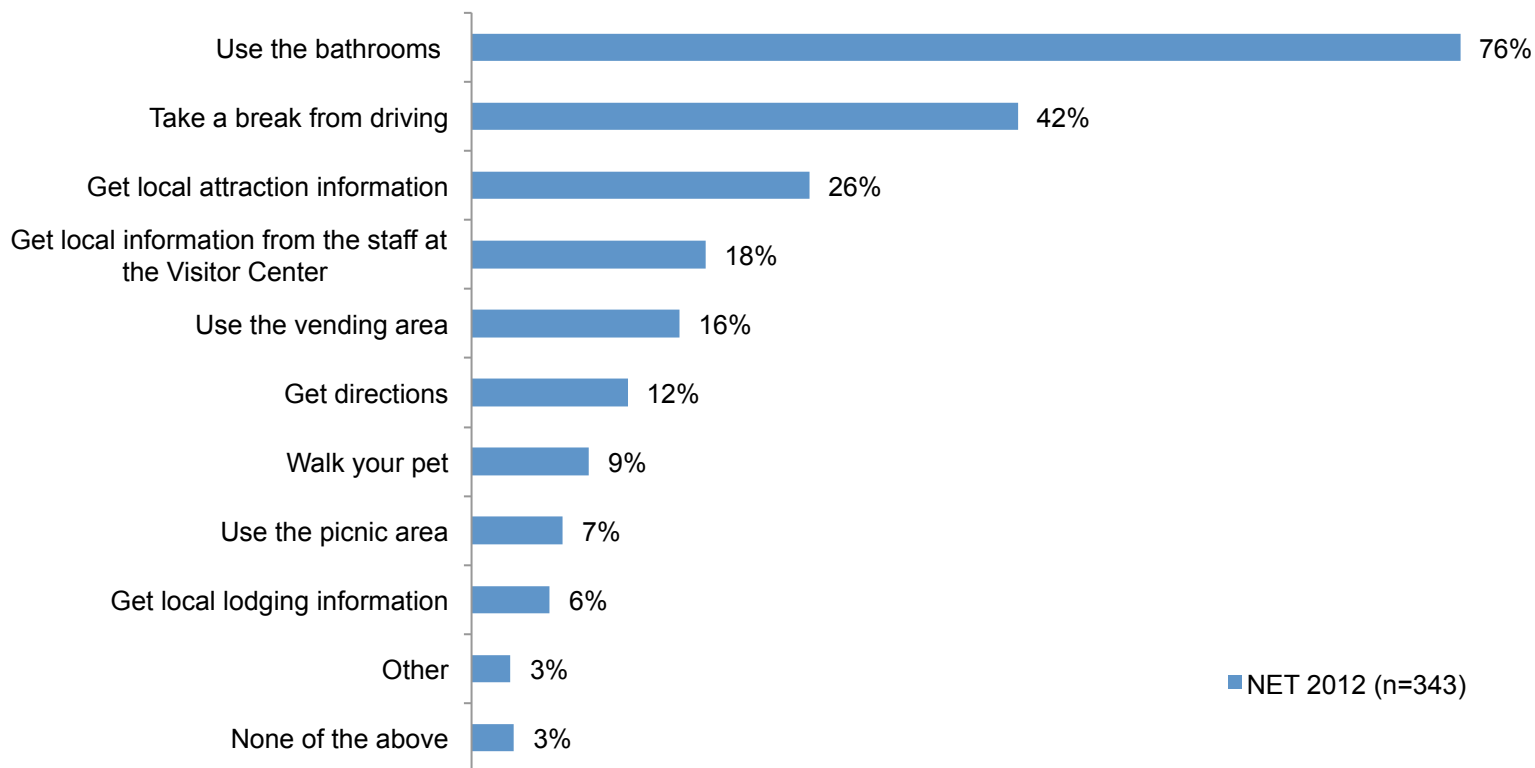
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Reasons for Visitor Center Usage

- Using the bathrooms is still the most popular use among day visitors who went to a Maine Visitor Center. None of the stated reasons showed any significant change from 2011.

Reasons for Visitor Center Usage



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

Day Q12c. Was there anything specific you were looking for at the Visitor Center that you could not find or wish was provided?

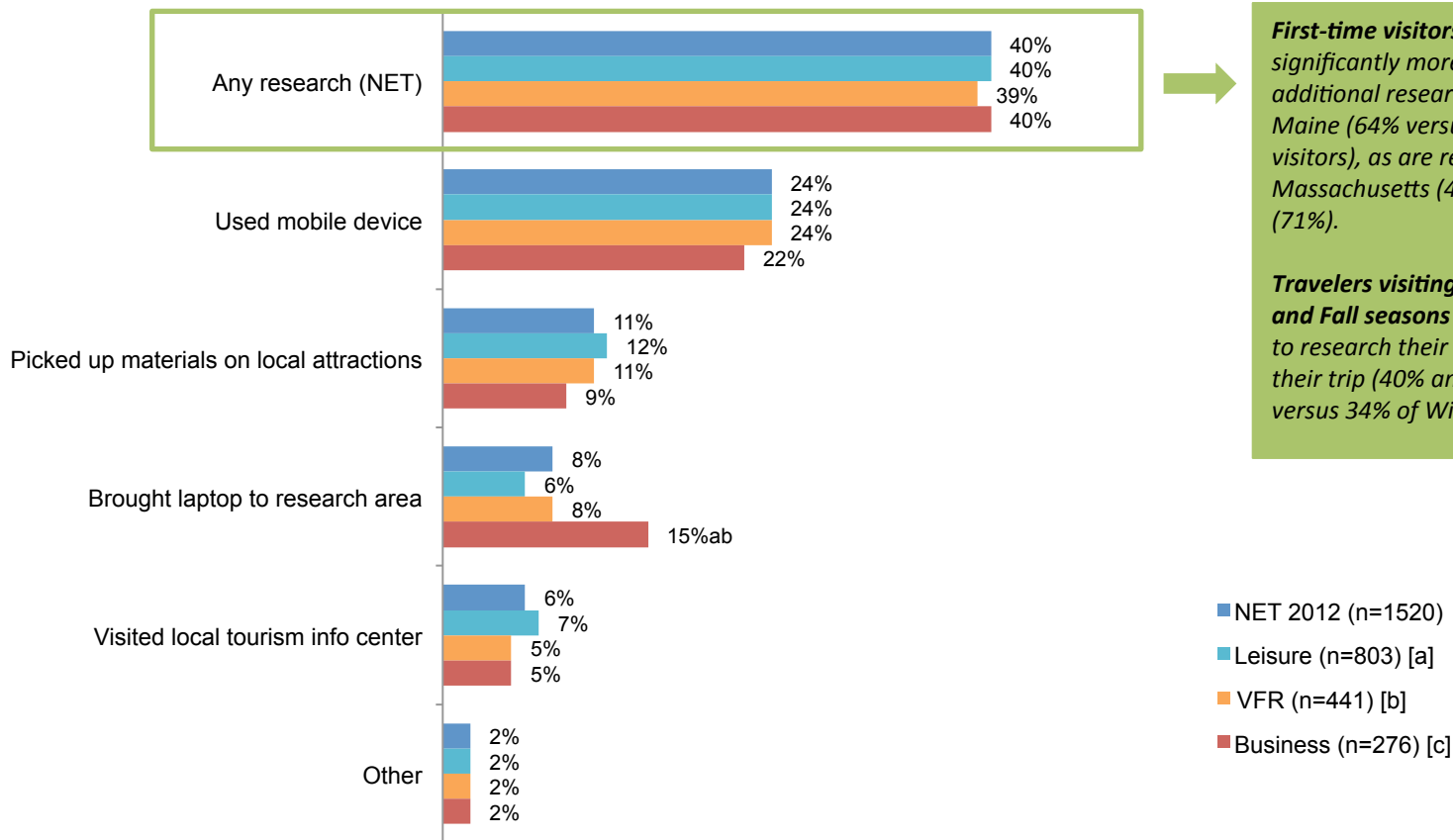
*Base less than 100, use for directional purposes only.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Trip Research While in Maine

- Consistent with levels seen in 2011, two in five day visitors conducted research on Maine while vacationing. This is much less than the level reported by overnight visitors (62%).
- Though the proportion of day visitors conducting research in Maine while visiting is lower than for overnight visitors, the proportion using a mobile device to conduct this research is the same among both overnight and day visitors.



First-time visitors to Maine are significantly more likely to conduct additional research after arriving in Maine (64% versus 39% of repeat visitors), as are residents of Massachusetts (49%) and Vermont (71%).

Travelers visiting during the Summer and Fall seasons are also more likely to research their destination during their trip (40% and 41%, respectively, versus 34% of Winter visitors).

■ NET 2012 (n=1520)
 ■ Leisure (n=803) [a]
 ■ VFR (n=441) [b]
 ■ Business (n=276) [c]

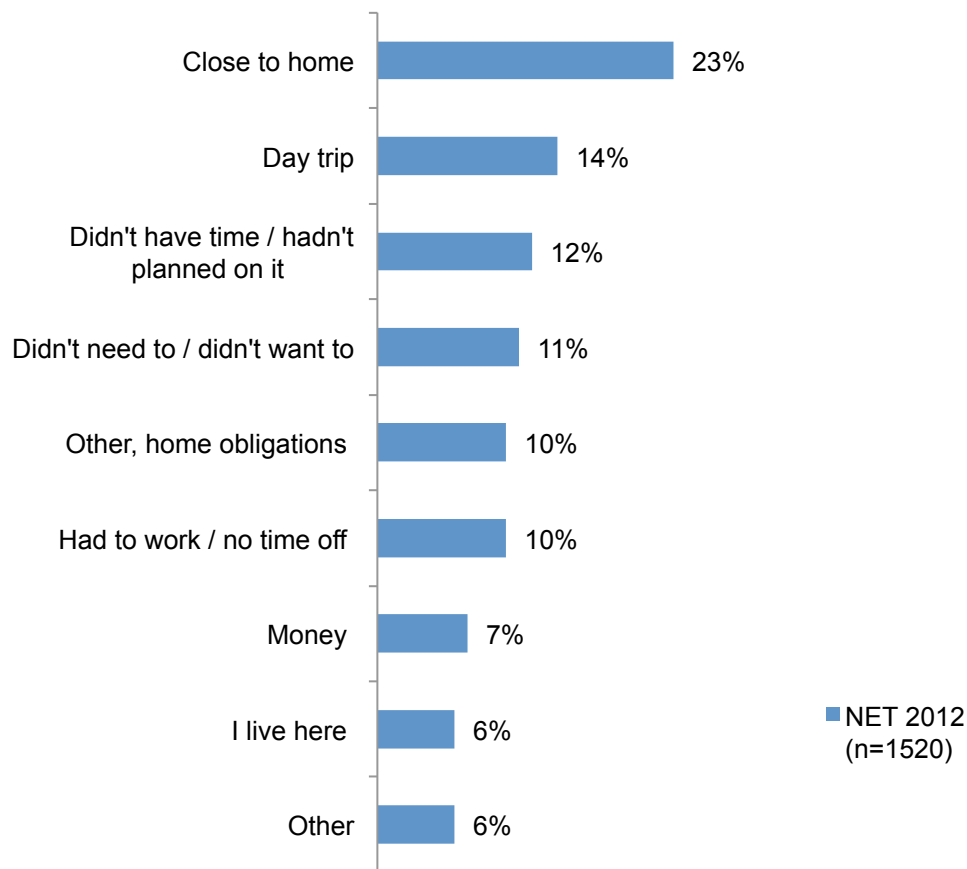
Day Q12d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Why Day Visitors Did Not Stay Overnight

- When day visitors were asked why they did not spend the night in Maine, one-fourth reported that Maine was close to home. The trip being a planned day trip or having obligations at home were other commonly cited reasons.



Day Q18. Why didn't you stay overnight at this destination while visiting Maine?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

The Maine Day Visitor Experience

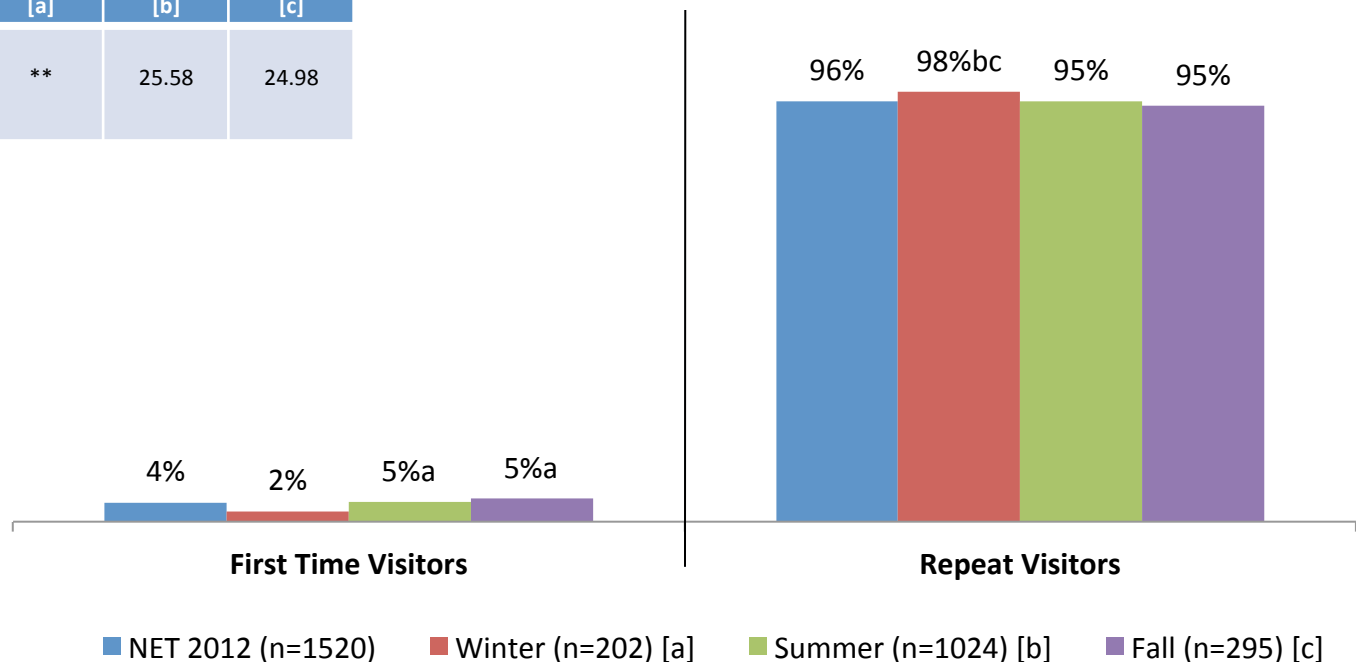


Repeat versus First-Time Visitors

- Day visitors are much more likely than overnight visitors to be repeat visitors to Maine. In fact, nearly all day visitors surveyed reported that they have been to Maine before.
- First-time day visitors to Maine were more likely to have visited during the Summer or Fall seasons.

Day Visitors	NET 2012 (n=1520)	Winter (n=202) [a]	Summer (n=1024) [b]	Fall (n=295) [c]
Average number of trips to Maine in past 5 years	25.45	**	25.58	24.98

First Trip to Maine?



Day Q4. Was this your first trip to Maine?

Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

** This question was added to the questionnaire in Summer 2012, so no data is available for the Winter 2011/2012 season.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Reasons for Selecting Maine*

- There was a significant year-over-year decrease in the percentage of day visitors who selected Maine because it was *close* or they *live in the State*. There was a higher proportion of day visitors stating that they chose to take this day trip in Maine because of Maine's *good food/seafood*.

	NET 2012 (n=1520)	Leisure (n=803) [a]	VFR (n=441) [b]
Friends, relatives live here / where I'm from / familiar	18%	4%	55%a
Close / close to home / closest location / proximity / easy to get to	16%▼	25%b	8%
Shopping - outlet shopping, mall	12%	20%b	3%
Beaches / ocean / lakes / coast	11%	17%b	8%
I live here / have summer, 2nd home / timeshare	11%▼	13%	17%
Beautiful - scenery, beaches / natural beauty	7%	9%	8%
Good food / good seafood	7%▲	12%b	2%
Love the state, city, area / like it there / enjoy it	4%▼	4%	6%
Good attractions / museums / zoo / craft fairs / events	4%	8%b	1%
Scenery / ocean views / foliage	3%	4%	4%
Relaxing atmosphere / easy to travel in	3%	4%	2%
Specific outdoor activities - canoeing, boating, camping, fishing, golf	3%	4%b	2%
Other	5%	6%	6%

Day Q6. Thinking about all the places you could have chosen to visit for this specific trip, why did you choose Maine?

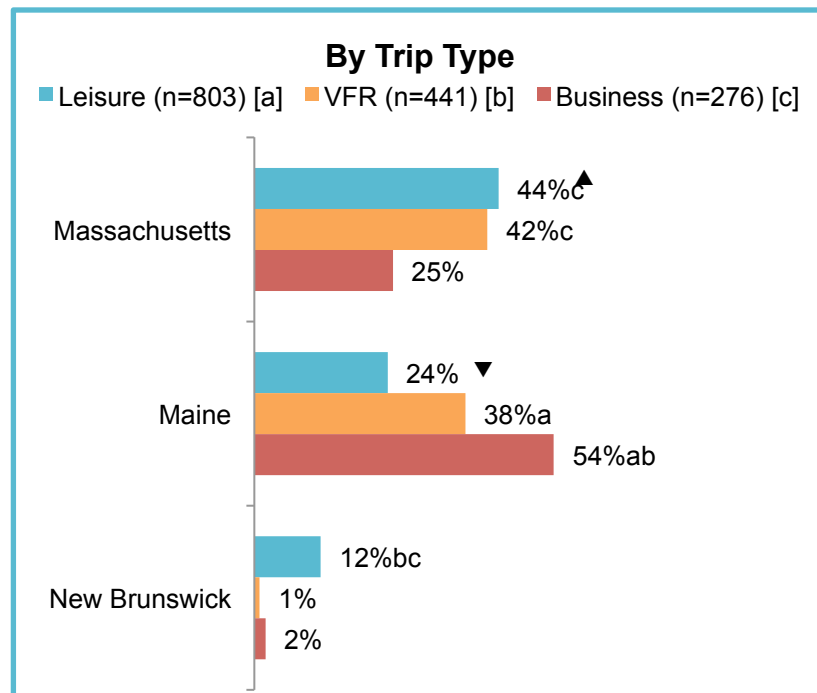
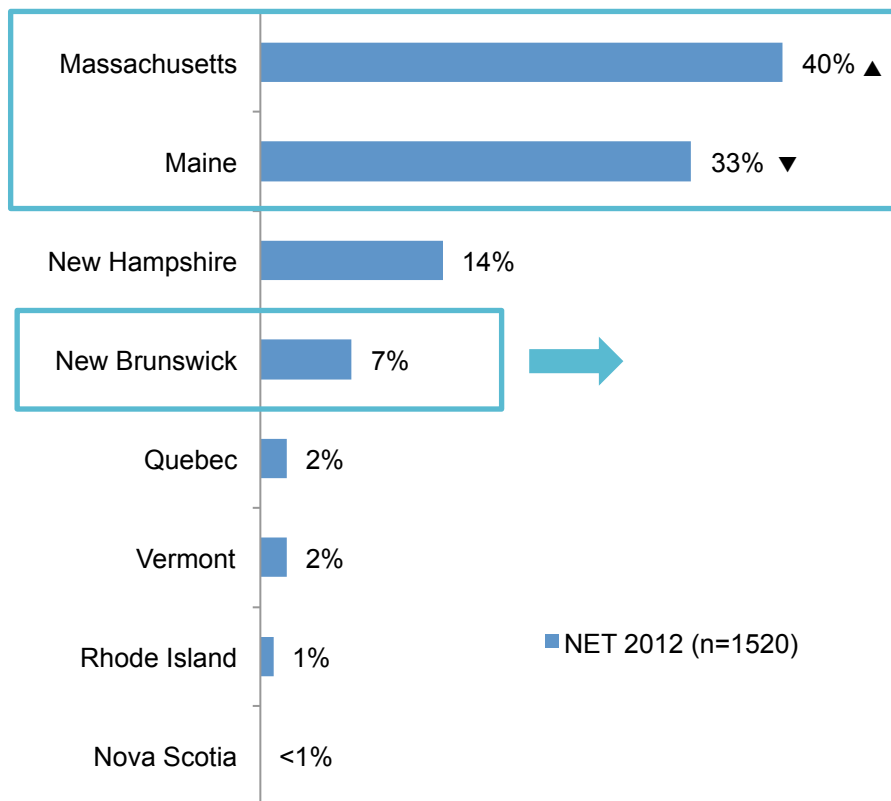
*Not asked of Business Travelers.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Residence of Maine Day Visitors

- After seeing an increase in the proportion of day visitors from within Maine between 2010 and 2011, the levels seen in 2012 have returned to those seen in 2010. Conversely, day visitation from Massachusetts appears to have increased over 2011. Canadian day visitation remained stable in 2012.
- Visitors from Massachusetts and New Brunswick are most likely to be on a leisure trip or visiting friends/relatives, while in-state day visitors are more likely to be on a business trip.



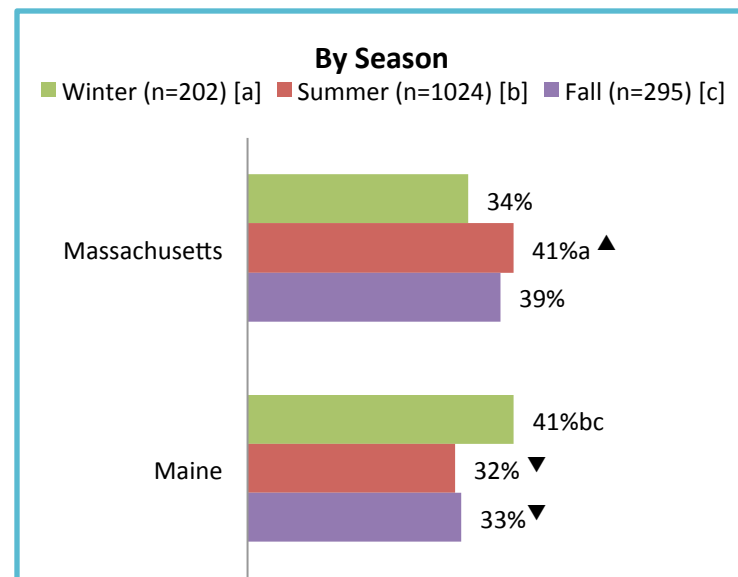
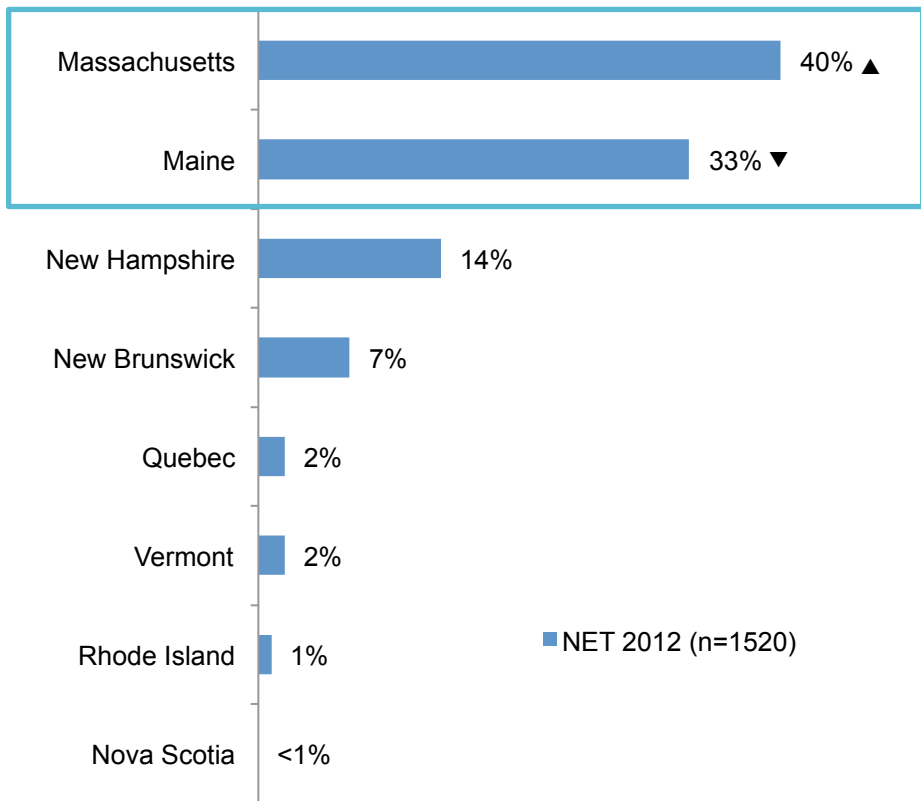
Day Q1a. In what state or province do you reside?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

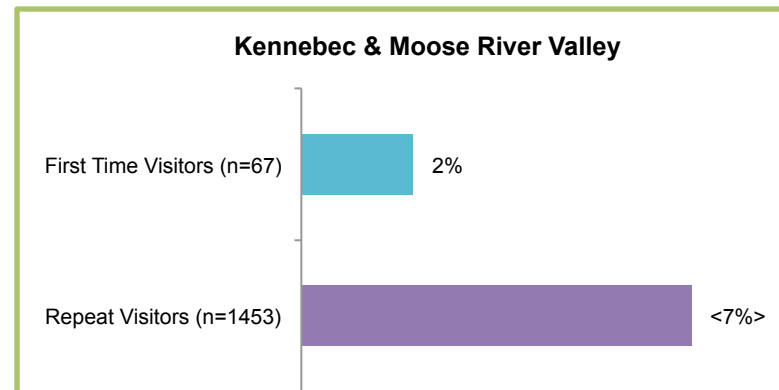
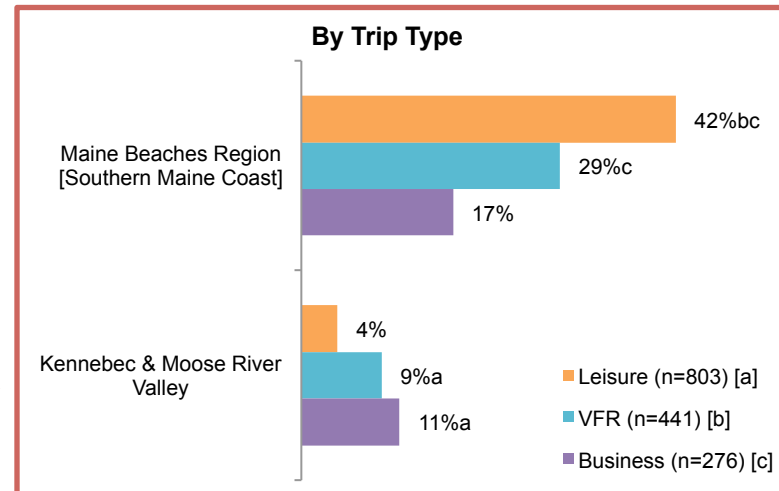
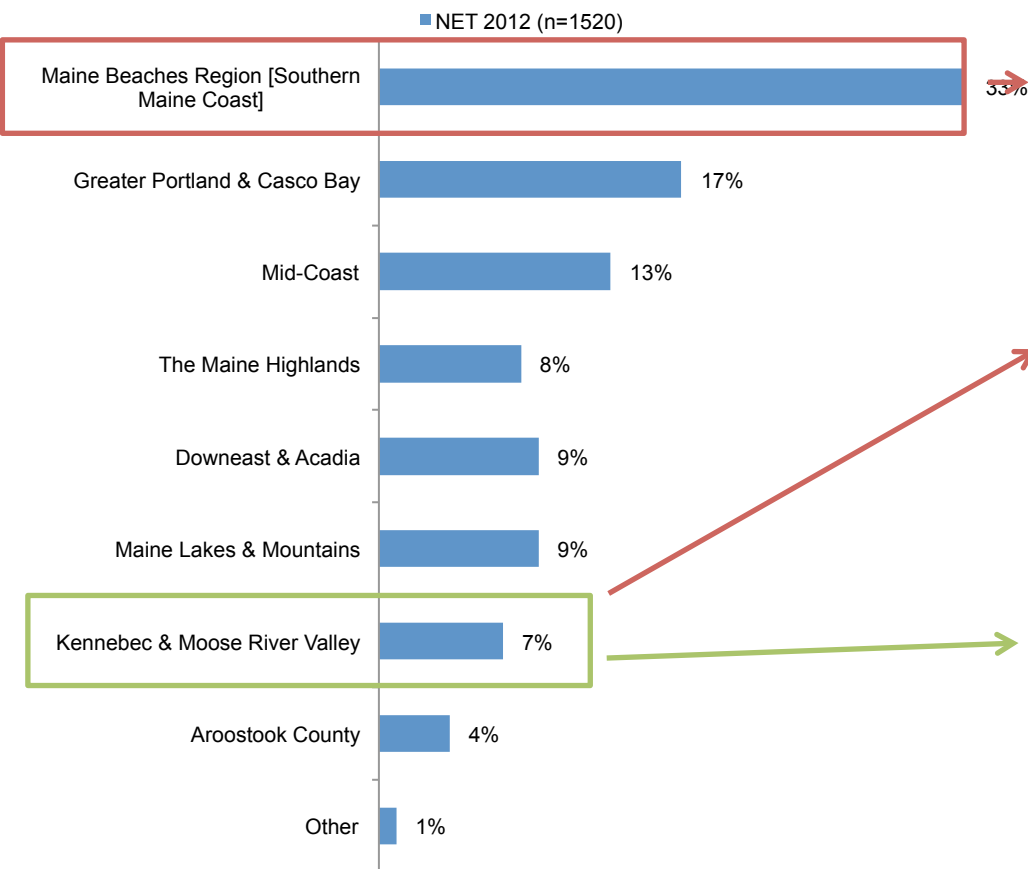
Residence of Maine Day Visitors

- The increase in the proportion of visitation from Massachusetts is largely driven by an increase in the share of Summer day visitation from that state. Likewise, the drop for in-state day travel appears to be driven by the Summer and Fall seasons. In-state day visitation during the Winter season remains strong.
- Two-thirds of first-time day visitors are from Massachusetts, as compared to 38% of repeat visitors. This out-of-state drive market provides a broad base for future repeat visitation to Maine.



Primary Region of Visit to Maine

- Similar to overnight visitors, the Maine Beaches Region saw the greatest proportion of day visitors, particularly among leisure visitors.



Day Q11. What region in Maine was your primary destination?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Primary Region of Visit to Maine

- Canadian day visitors were more likely than their U.S. counterparts to visit *The Maine Highlands, Downeast & Acadia*, and *Aroostook County*. This logically follows drive patterns into the State of Maine from Canada due to border crossings in each of these regions.

	NET 2012 (n=1520)	Total US (n=1374)	Canada (n=146)
Maine Beaches Region [Southern Maine Coast]	33%	<36%>	9%
Greater Portland & Casco Bay	17%	<18%>	8%
Mid-Coast	13%	<14%>	2%
The Maine Highlands	8%	6%	<21%>
Downeast & Acadia	9%	6%	<30%>
Maine Lakes & Mountains	9%	<9%>	5%▲
Kennebec & Moose River Valley	7%	<7%>	2%
Aroostook County	4%	2%	<22%>
Other	1%	1%	1%

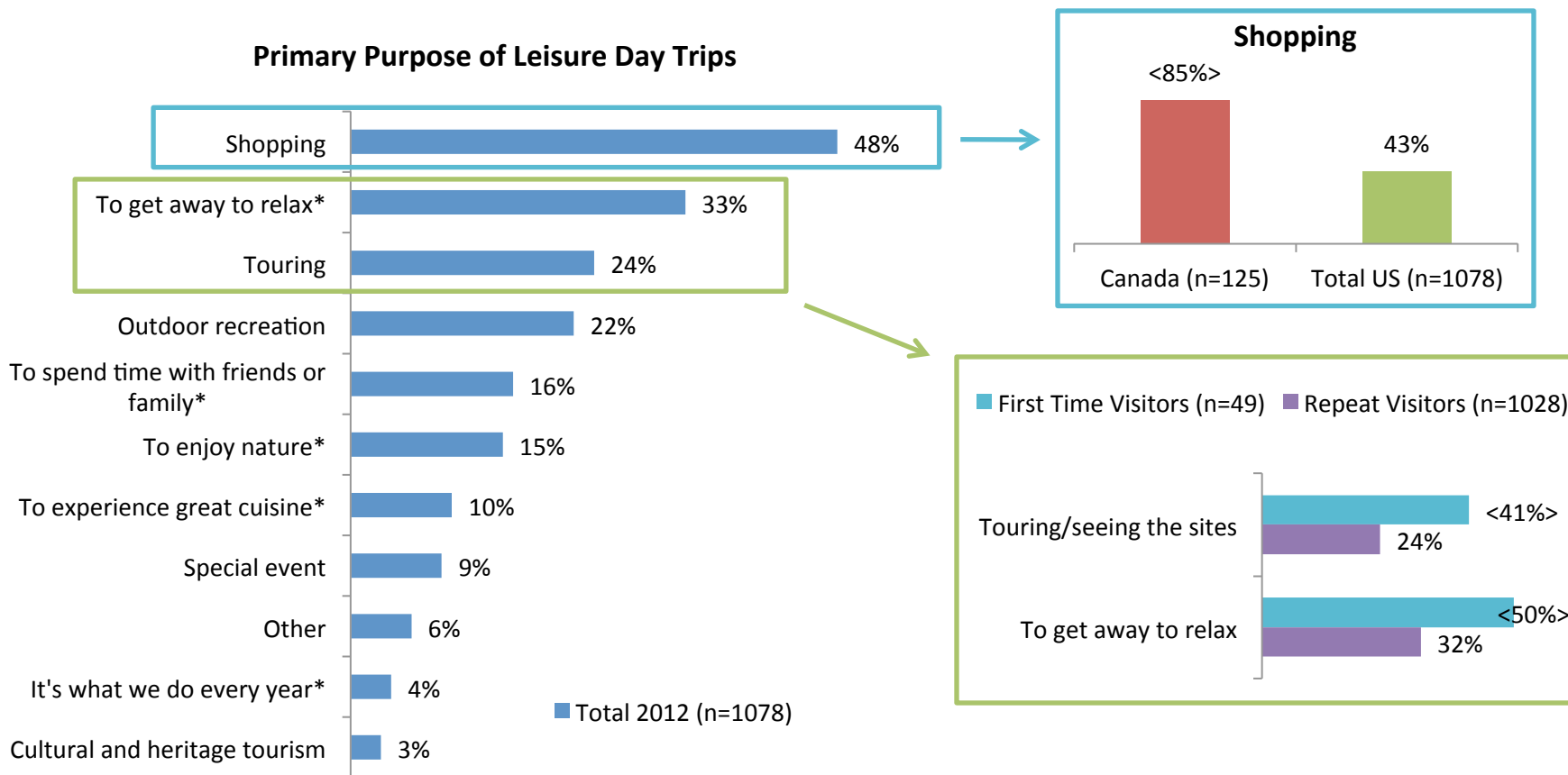
Day Q11. What region in Maine was your primary destination?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Primary Purpose of Leisure Day Trips

- Half of leisure day visitors to Maine reported that shopping was the primary purpose of their trip. Canadians' attraction to shopping in Maine is underscored by the primary purpose of leisure day trips to the state. While 43% of US residents report that shopping was the primary purpose of their leisure day trip, nearly double that proportion (85%) of Canadians report this to be the case.



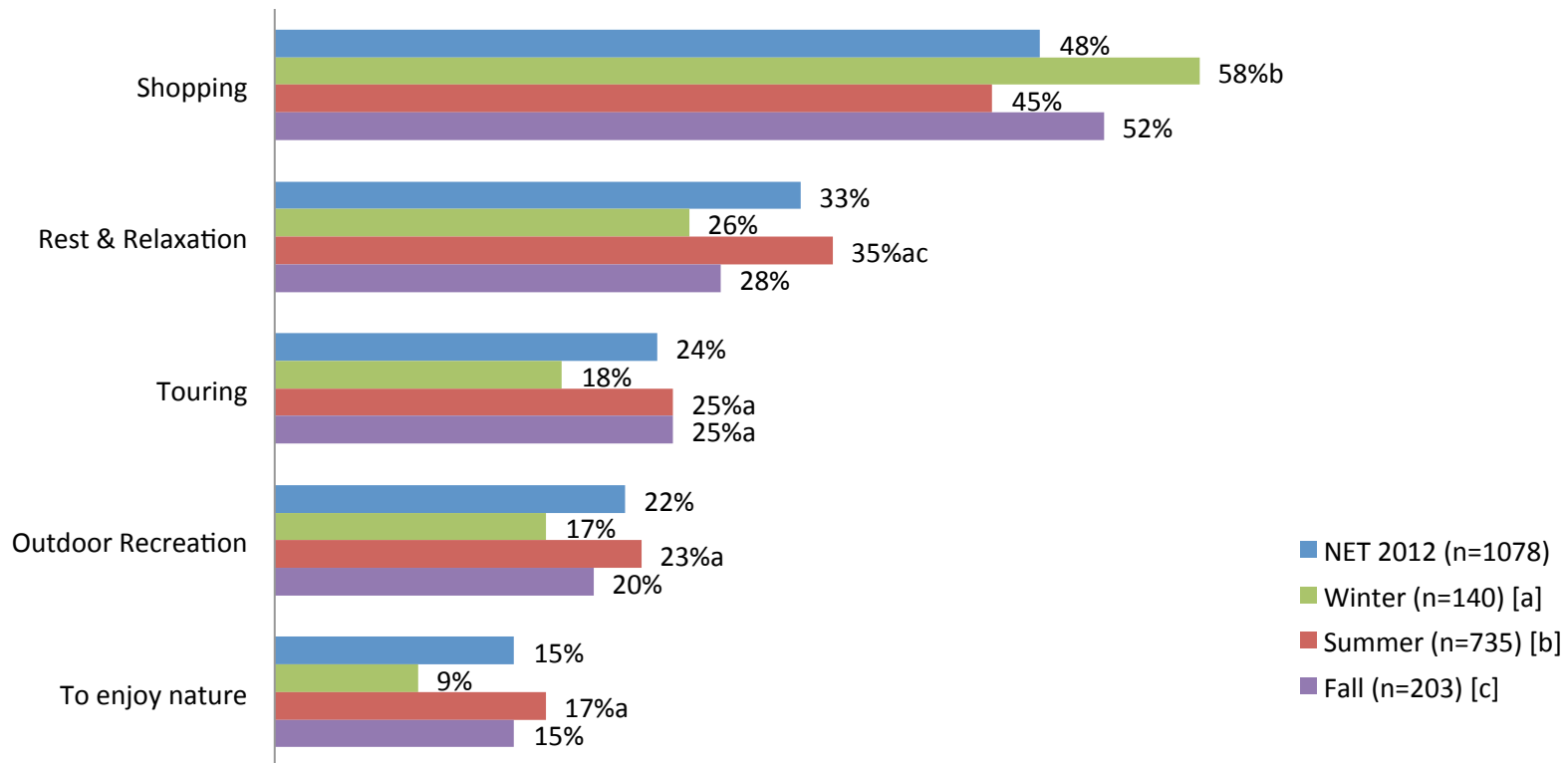
Day Q3. What was the primary purpose of your most recent leisure day trip in Maine?

*Asked in 2012 only. Due to revisions during 2012 in the answer options, direct comparisons between the 2011 and 2012 data can not be made.

Primary Purpose of Leisure Day Trips

- Seasonal variations in trip purpose can be seen in shopping, relaxing, touring/sightseeing, and enjoying nature.

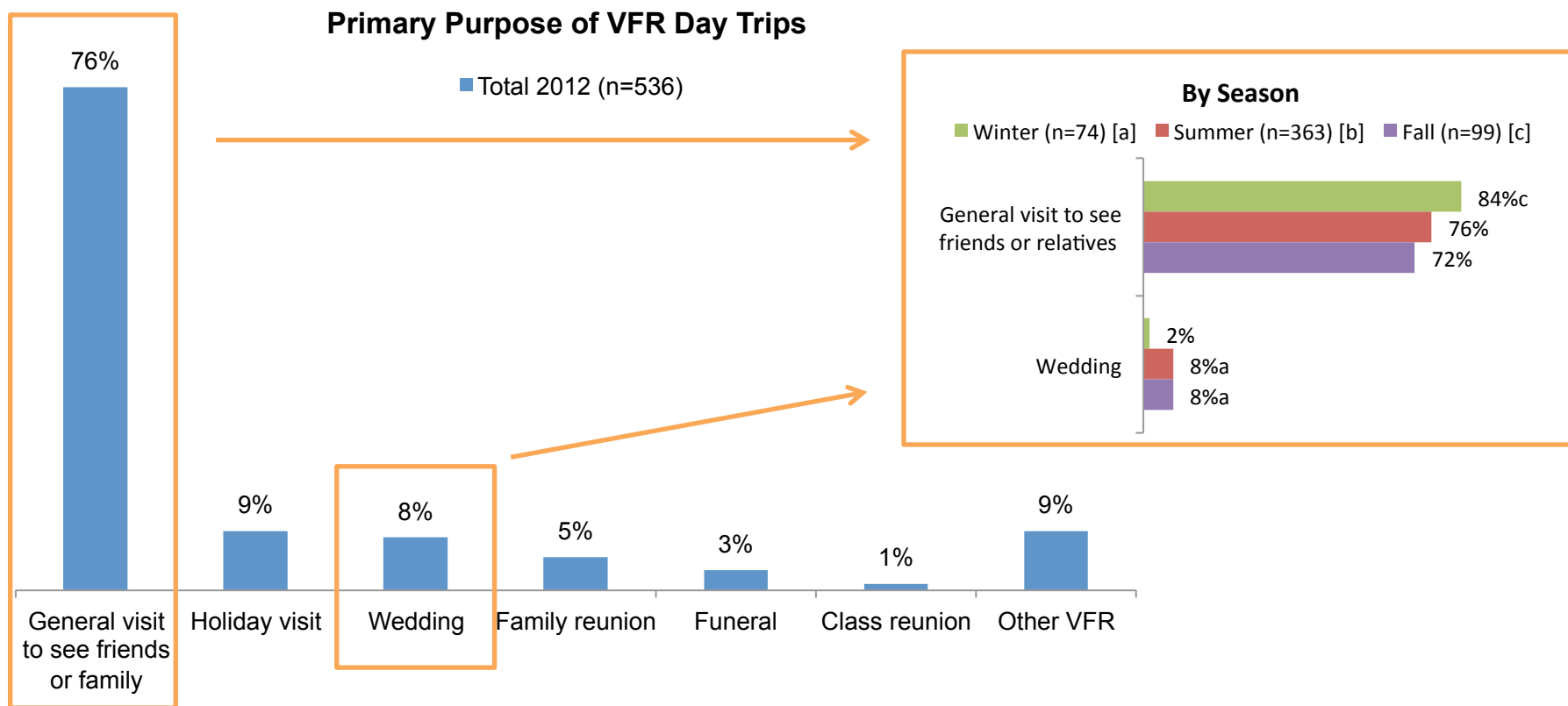
Primary Purpose of Leisure Day Trips



Day Q3. What was the primary purpose of your most recent leisure trip in Maine?
a, b, c indicates significant difference at the 95% confidence level

Primary Purpose of VFR Day Trips

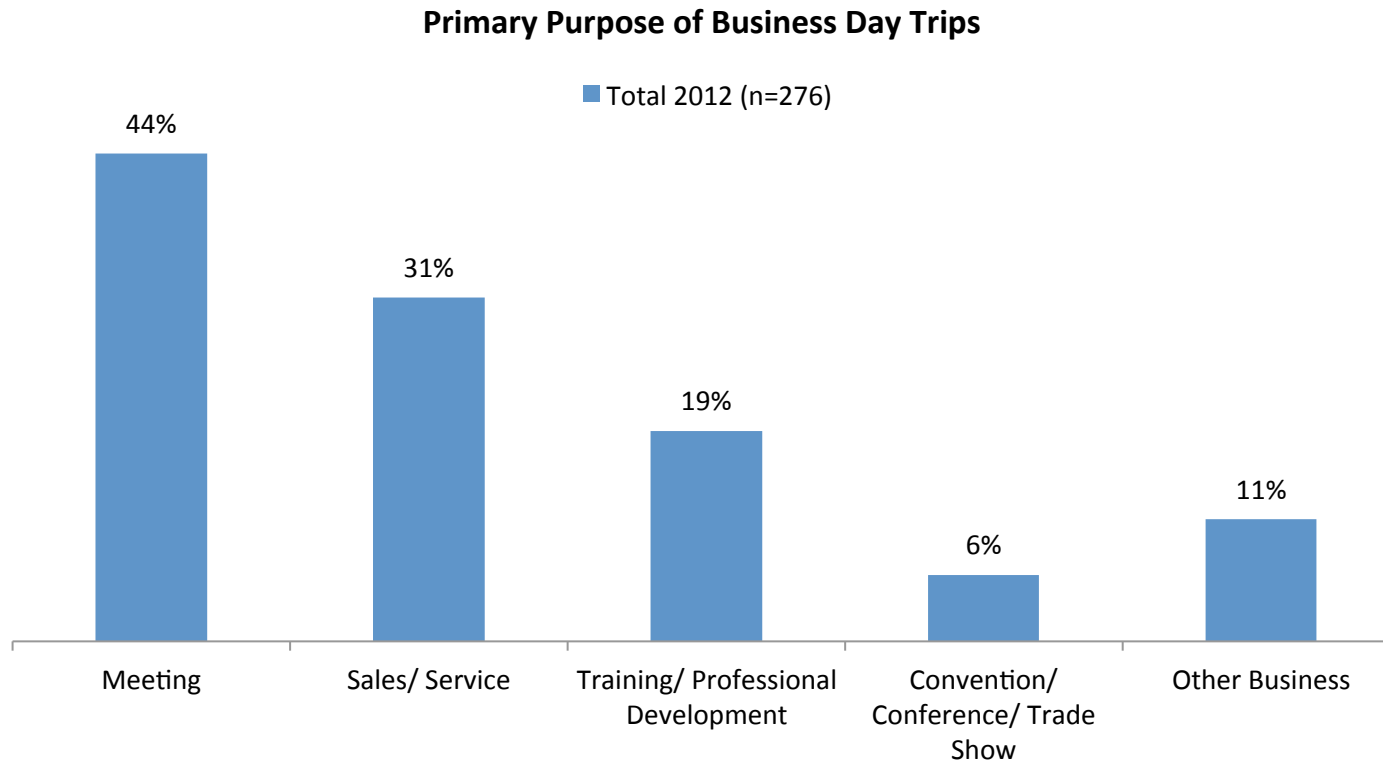
- As expected, three-quarters of VFR day trips to Maine are general trips to see friends or relatives.
- Seasonal differences can be seen for *weddings* (Fall) and *general trips to see friends/relatives* (Winter).



Day Q3. What was the primary purpose of your most recent day trip to visit friends or relatives in Maine?
 a, b, c indicates significant difference at the 95% confidence level

Primary Purpose of Business Day Trips

- Two-fifths of business day visitors to Maine reported that they came to Maine for a meeting, while one-fourth came to Maine for sales or service.



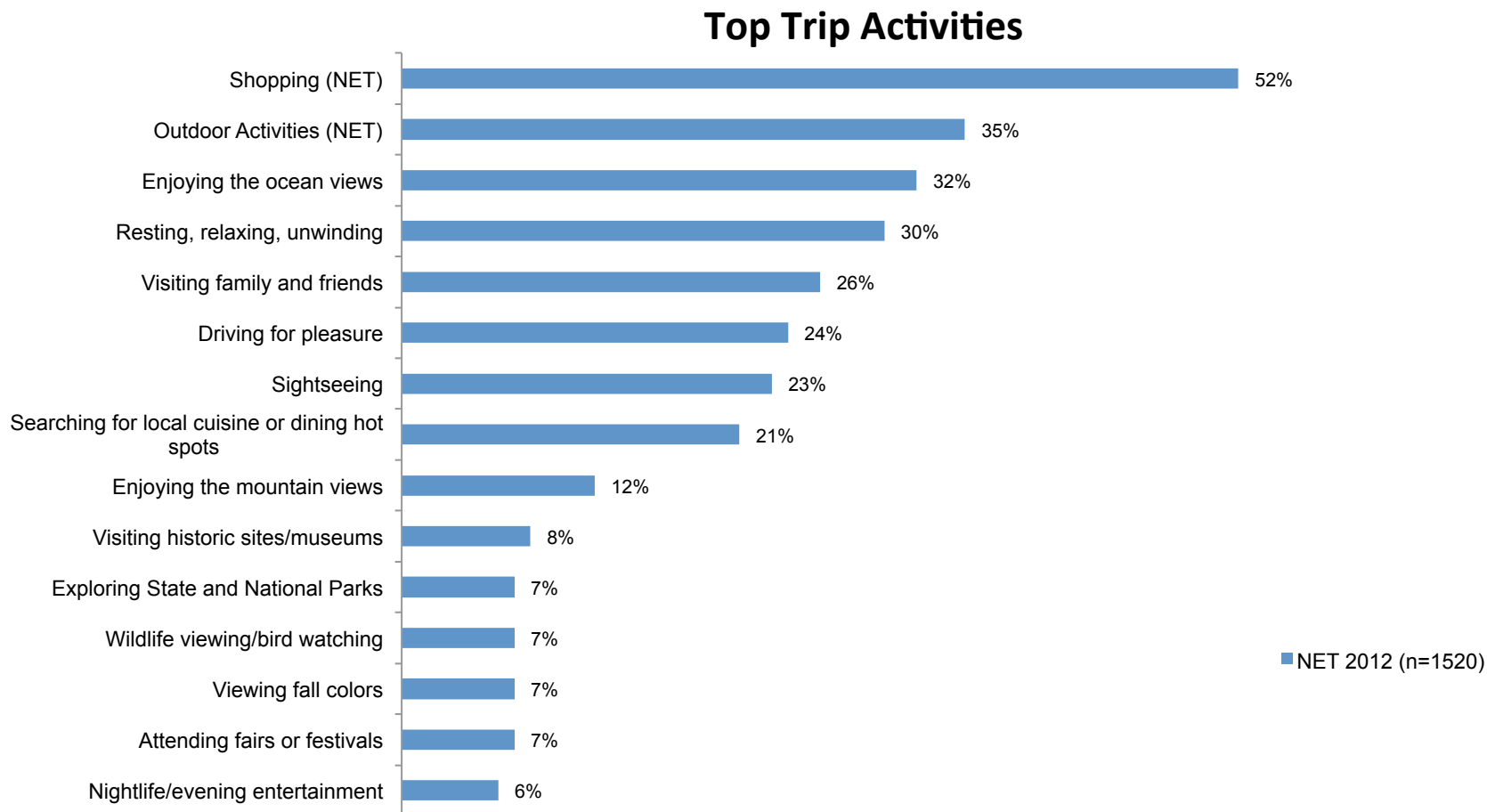
Day Q3. What was the primary purpose of your most recent business day trip in Maine?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Day Visitor Trip Activities

- *Shopping* continues to be the most popular activity among day visitors, followed by *outdoor activities* and *enjoying ocean views*. Overall, trip activities among day visitors remain consistent with 2011.



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

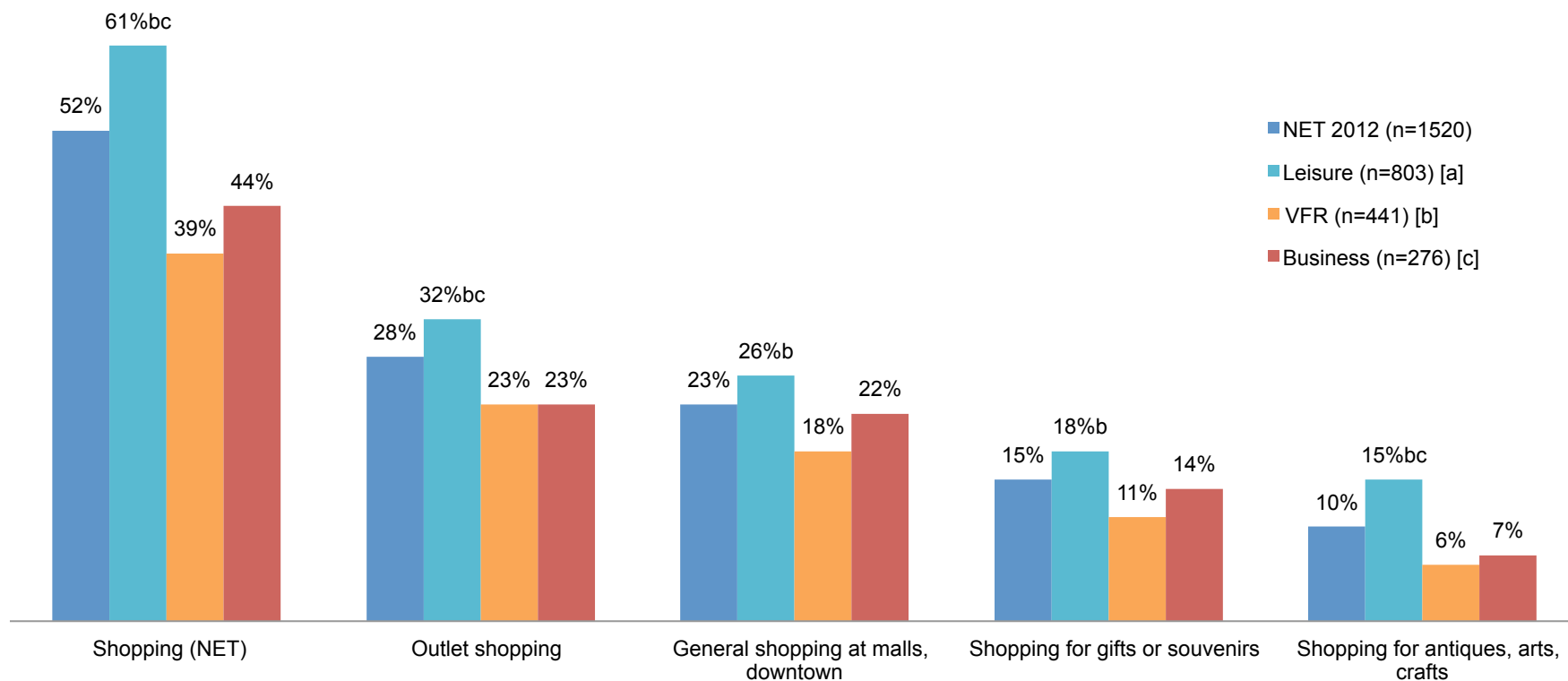
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Shopping Activities

- Day visitors to Maine continued to take advantage of Maine's shopping opportunities with a focus on outlet shopping and general shopping at malls and downtown areas.
- Reported levels of shopping were consistently higher among leisure visitors.

Shopping Trip Activities



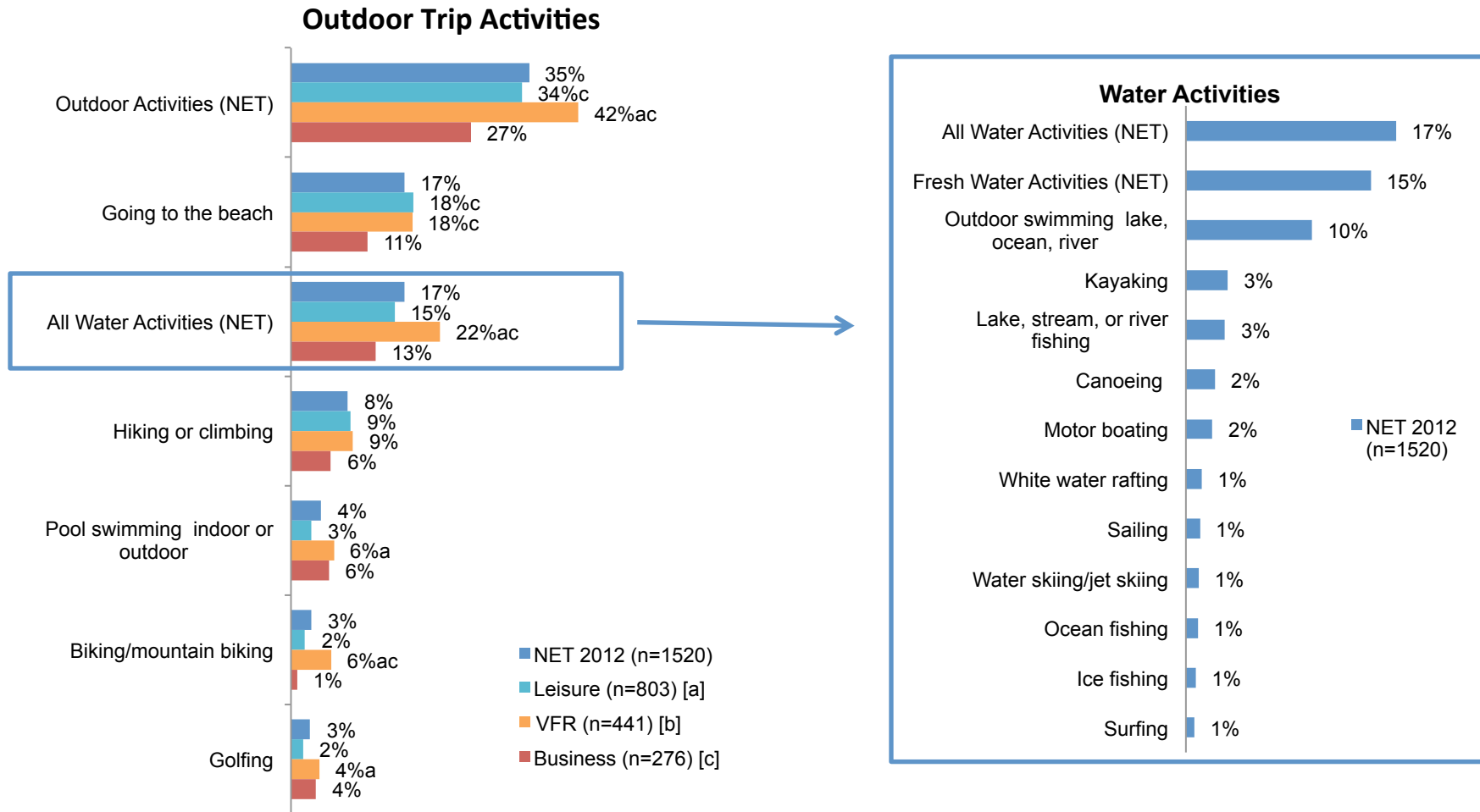
Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply)

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Outdoor Activities

- Among outdoor activities, day visitors mostly enjoyed various *water activities* and *going to the beach*, similar to overnight visitors.



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

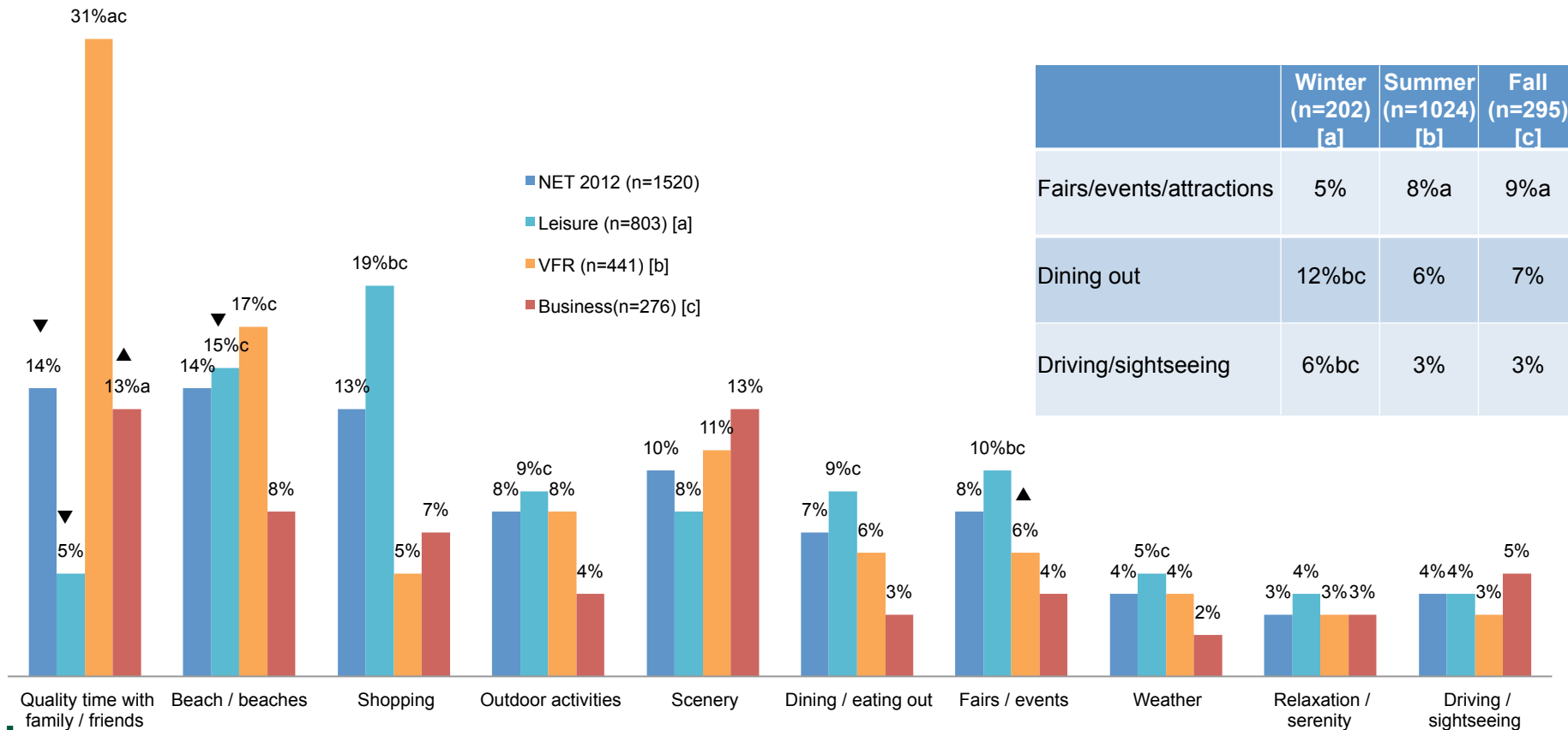
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Highlight of Day Trip to Maine

- Day visitors to Maine continue to report *quality time with friends/family*, the *beach*, and *shopping* as highlights of their trip. Interestingly, though, quality time with friends/family was down overall from 2011.

Top Highlights of Day Trip to Maine



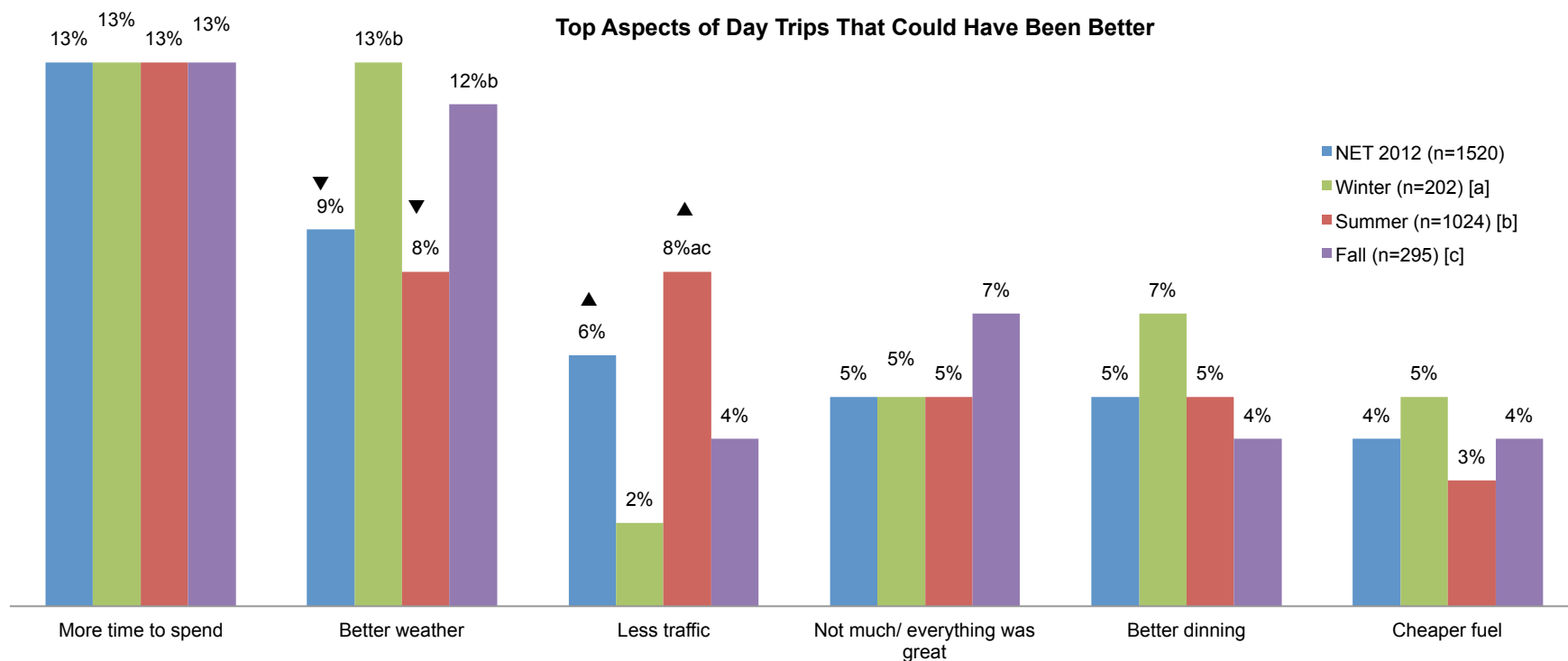
Day Q16. What was the highlight of your day trip in Maine?

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Aspects of Day Trips that Could Have Been Better

- As with overnight visitors to the state, the largest percentage of day visitors point to the weather and a lack of time as their key issues with their visit. Responses were stable across trip types.
- Weather was less of a concern in 2012 than it had been in 2011, particularly among summer visitors. Traffic, on the other hand, was more of a concern in 2012, and more so among summer visitors.



Day Q17. What do you wish could have been better?

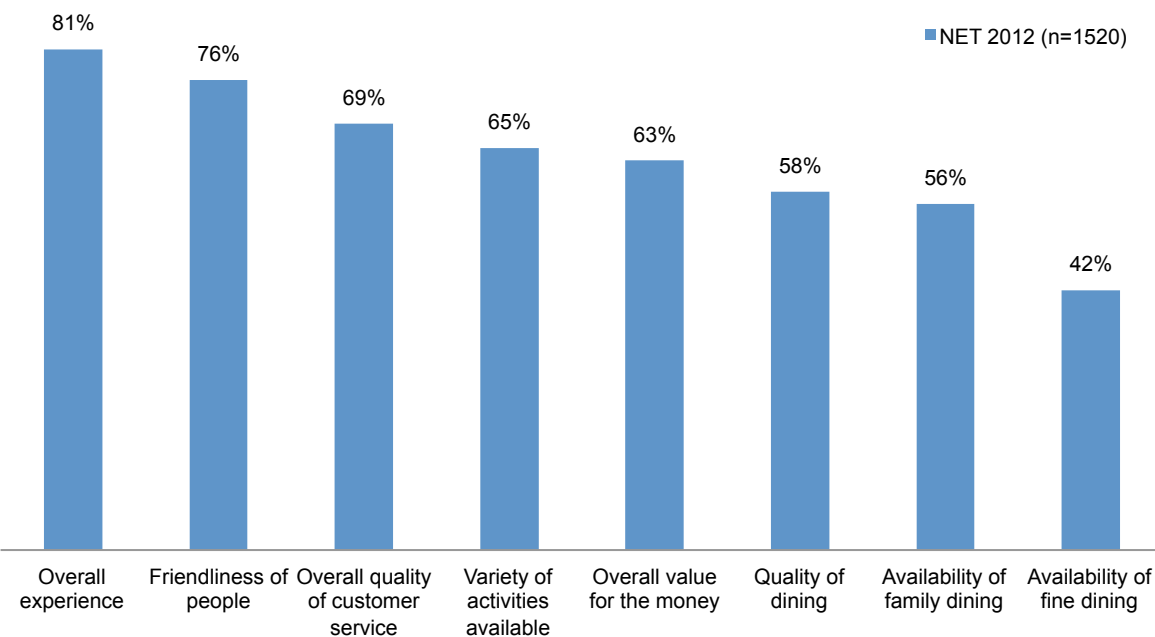
a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Comparison of Maine to Other Destinations

- Day visitors continue to see Maine's strength as a destination, rating particularly well the overall experience and friendliness of the people. Overall ratings of Maine are consistent with 2011, with a few higher ratings among business travelers in 2012 (*overall quality of customer service, availability of family dining, and variety of activities available*).
- Day visitors from the United States rate Maine more favorably on a number of attributes as compared to Canadian day visitors, a pattern also seen among overnight visitors.

Top Two Box Summary: Maine was one of the best/better than most



	Total US (n=1374)	Canada (n=146)
Overall experience	<82%>	65%
Friendliness of people	<77%>	65%
Overall quality of customer service	<70%>	61%
Variety of activities available	<67%>	39%
Overall value for the money	63%	66%
Quality of dining	<60%>	38%
Availability of family dining	<57%>	41%
Availability of fine dining	<44%>	27%

Phrases that Best Describe Maine – Top Descriptors

- Day visitors used a number of phrases to describe Maine, showing very little variation from the descriptors used by overnight visitors. *Beautiful scenery, fresh air, and a great place to relax/unwind* were all selected by at least two-thirds of day visitors.
- Also like overnight visitors, some phrases showed a decrease from 2011 in the proportion selecting them to describe Maine. This was seen particularly among leisure visitors.

	NET 2012 (n=1520)	Leisure (n=803) (a)	VFR (n=441) (b)	Business (n=276) (c)
Beautiful scenery	76%	76%	79%	73%▼
Fresh air	68%▼	67%▼	72%	65%▼
Great place to relax / unwind	67%	67%	69%	66%
Clean water	57%▼	54%▼	59%	64%a
Outdoor recreation activities	54%▼	51%▼	60%a	52%
Place for a quick getaway	58%	63%bc	53%	50%
Good food / restaurants	54%	57%c	52%	48%
Great family vacation destination	52%▼	51%▼	57%	50%
Escape from my daily routine	51%▼	52%▼	53%	44%
Clean beaches	49%▼	50%c▼	52%c	39%
Great beaches	49%	49%▼	53%	44%
Unspoiled environment	45%	43%▼	45%	49%
Great shopping opportunities	43%▼	50%bc▼	37%	32%

Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Phrases that Best Describe Maine – Lowest Descriptors

- The phrases that are less often used to describe Maine by day visitors also saw the same pattern as those used more often, with some significant drops seen between 2011 and 2012 but most returning to previously seen levels in 2010 and earlier.

	NET 2012 (n=1520)	Leisure (n=803) (a)	VFR (n=441) (b)	Business (n=276) (c)
Lots of wildlife	43%▼	39%▼	45%	48%a
Great value for my money	39%	43%b	35%	36%
Offers many things to do	39%	41%	37%	37%
Great winter outdoor recreation activities	34%	31%▼	36%	40%a
Interesting historic sites	26%▼	25%▼	26%	29%
Romantic getaway	25%▼	21%▼	29%a	27%
Fine dining	23%	21%	25%	25%
Place I long to go to	18%	16%▼	23%a▲	17%▲
High quality lodging	16%	16%	16%	16%
Interesting cultural activities	15%	15%	12%	18%
Cold	14%	10%	19%a	16%

Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Key Visitor Metrics



Overnight Visitor Spending

- Overnight leisure travelers overall spent less per trip in 2012 than in 2011, returning to levels seen in 2009 and 2010. Significant drops in *retail* and *recreation* spending were seen, particularly among VFR travelers.

2012 Overnight Travel Spending	2011 Total	2012 Total	2012 Leisure (n=1366) (a)	2012 VFR (n=813) (b)	2012 Business (n=318) (c)
Net Spending (Mean**)	\$921.75	\$856.59▼	\$990.39bc	\$625.98	\$871.74b
Spending by Category:					
Lodging (Median*)	\$200	\$200	\$300.00	\$204.00#	\$250.00
Transportation (Median*)	\$100	\$100	\$100.00	\$90.00	\$100.00
Food (Median*)	\$170	\$200	\$205.00	\$140.00	\$150.00
Retail Goods (Mean**)	\$178.61	\$136.28▼	\$168.71bc▼	\$93.93▼	\$105.28
Recreation (Mean**)	\$38.88	\$30.72▼	\$35.54b	\$23.15▼	\$29.38

*Medians include zero without outliers

** Means including zero without outliers

#VFR Spending is reported using the mean including zero without outliers because over half of VFR visitors reported spending \$0 on lodging. Regional Q33. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below. a, b, c indicates significant difference at the 95% confidence level

Day Visitor Spending

- Unlike overnight visitors, day visitors to Maine spent more on average in 2012 than they did in 2011. This increase was seen across all trip types.

2012 Day Travel Spending	2011 Total	2012 Total	2012 Leisure (n=803) (a)	2012 VFR (n=441) (b)	2012 Business (n=276) (c)
Net Spending (Mean**)	\$217.22	\$287.70▲	\$307.10bc▲	\$265.48▲	\$266.73▲
Spending by Category:					
Transportation (Median*)	\$50	\$50	\$50.00	\$50.00	\$50.00
Food (Median*)	\$50	\$58	\$60.00	\$60.00	\$50.00
Retail Goods (Mean**)	\$84.81	\$85.82	\$109.24bc	\$53.53	\$69.25▲
Recreation (Mean**)	\$13.04	\$15.09	\$15.82c	\$16.57c	\$10.62

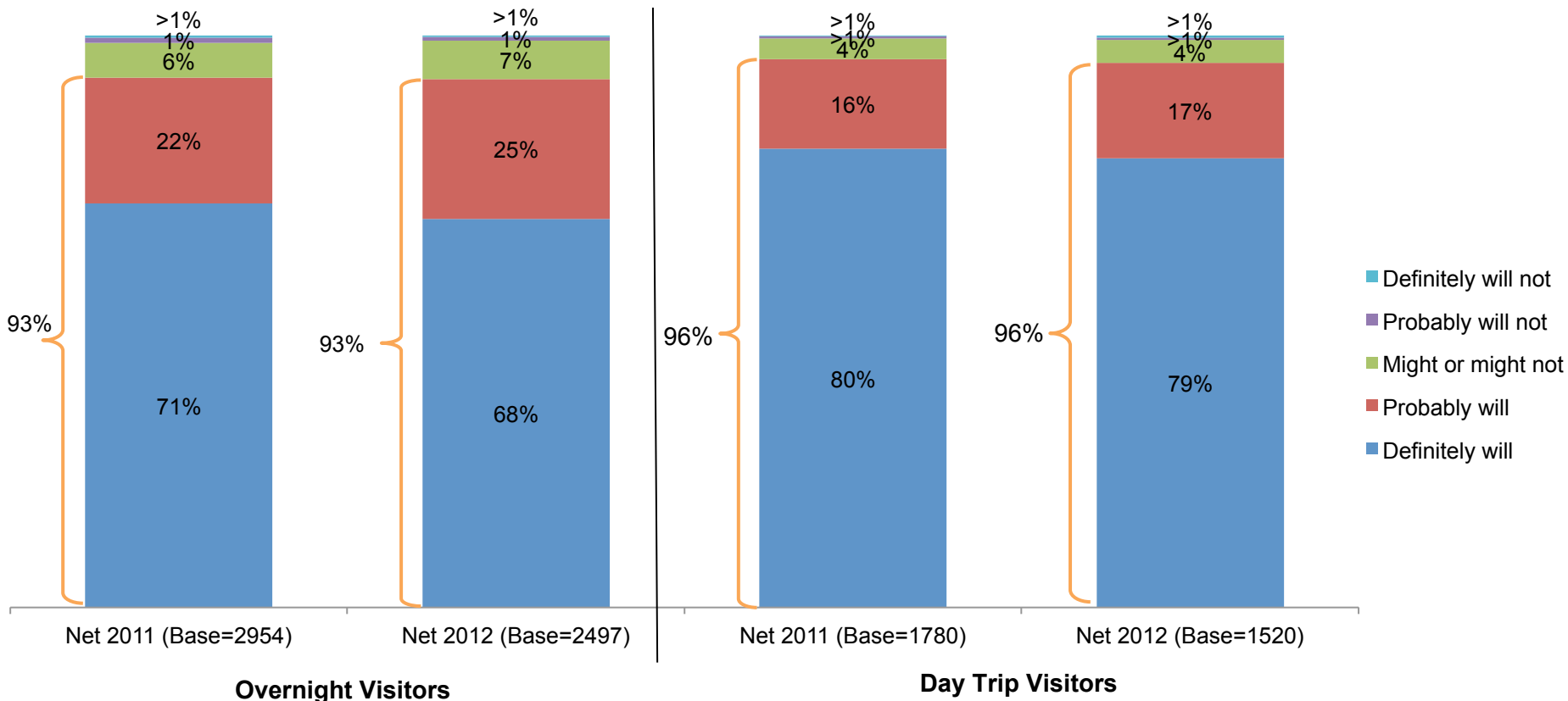
*Medians include zero without outliers

** Means including zero without outliers

#VFR Spending is reported using the mean including zero without outliers because over half of VFR visitors reported spending \$0 on lodging. Day Q14. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below. a, b, c indicates significant difference at the 95% confidence level

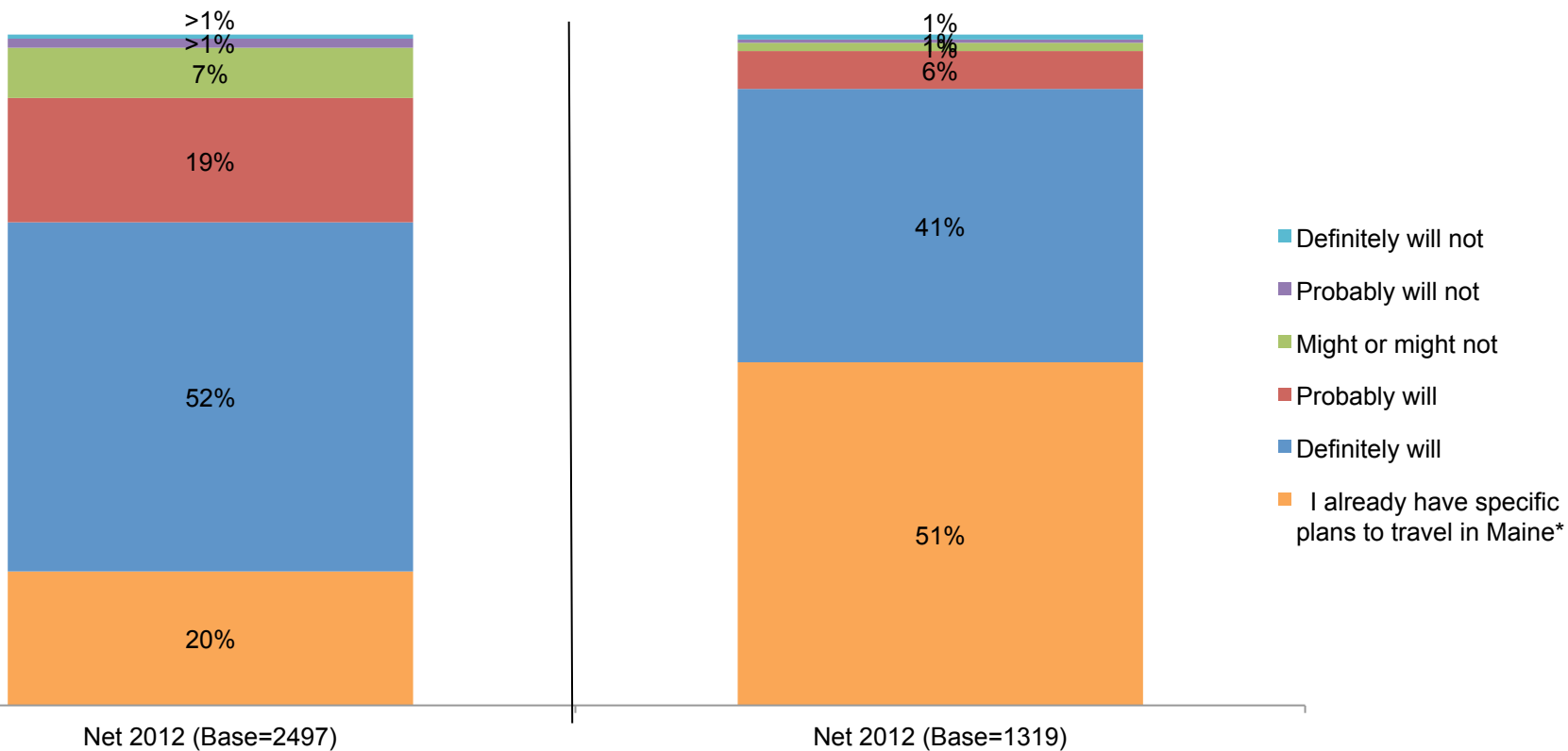
Likelihood to Recommend Maine

- Consistent with prior years, likelihood to recommend Maine is very strong among both overnight and day visitors. More than nine in ten visitors report that they will *probably* or *definitely* recommend Maine as a vacation destination to friends or relatives, with day visitors showing even more likelihood to recommend than overnight visitors.



Future Travel in Maine

- High continued repeat visitation to Maine appears likely, as 72% of overnight visitors and 92% of day visitors report *already having specific plans to travel in Maine* or that they *definitely will travel in Maine*.



Overnight Visitors

Day Trip Visitors

Regional Q37, Day Q19. How likely will you be to travel in Maine in the next two years?

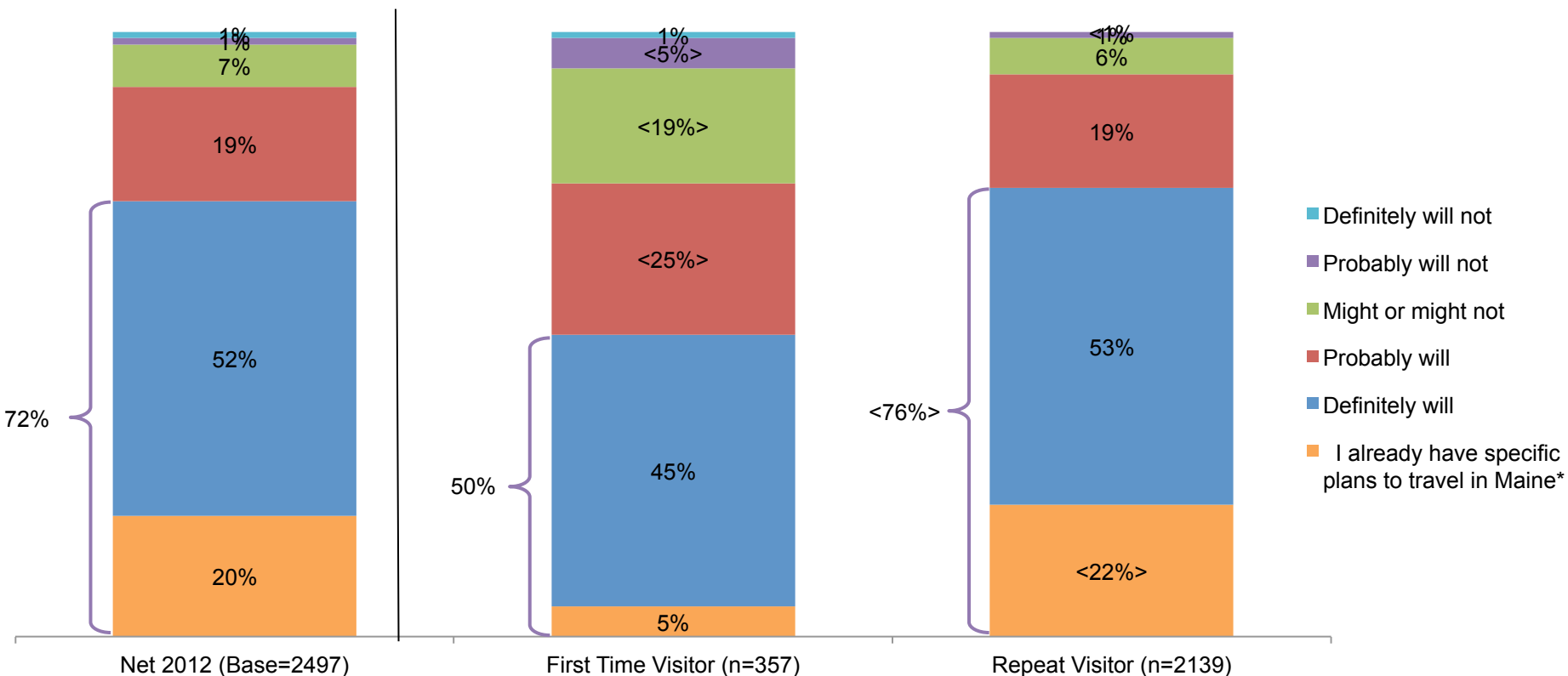
*Added Summer 2012. Due to revisions in the answer options in 2012, direct comparisons between 2011 and 2012 data can not be made

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

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Future Travel in Maine – Overnight Visitors

- Repeat overnight visitors express a higher intent to travel to Maine in the future than first-time visitors. Three-fourths of repeat visitors either already have specific plans to travel in Maine or indicate that they definitely will do so, as compared with half of first-time visitors.



Regional Q37, Day Q19. How likely will you be to travel in Maine in the next two years?

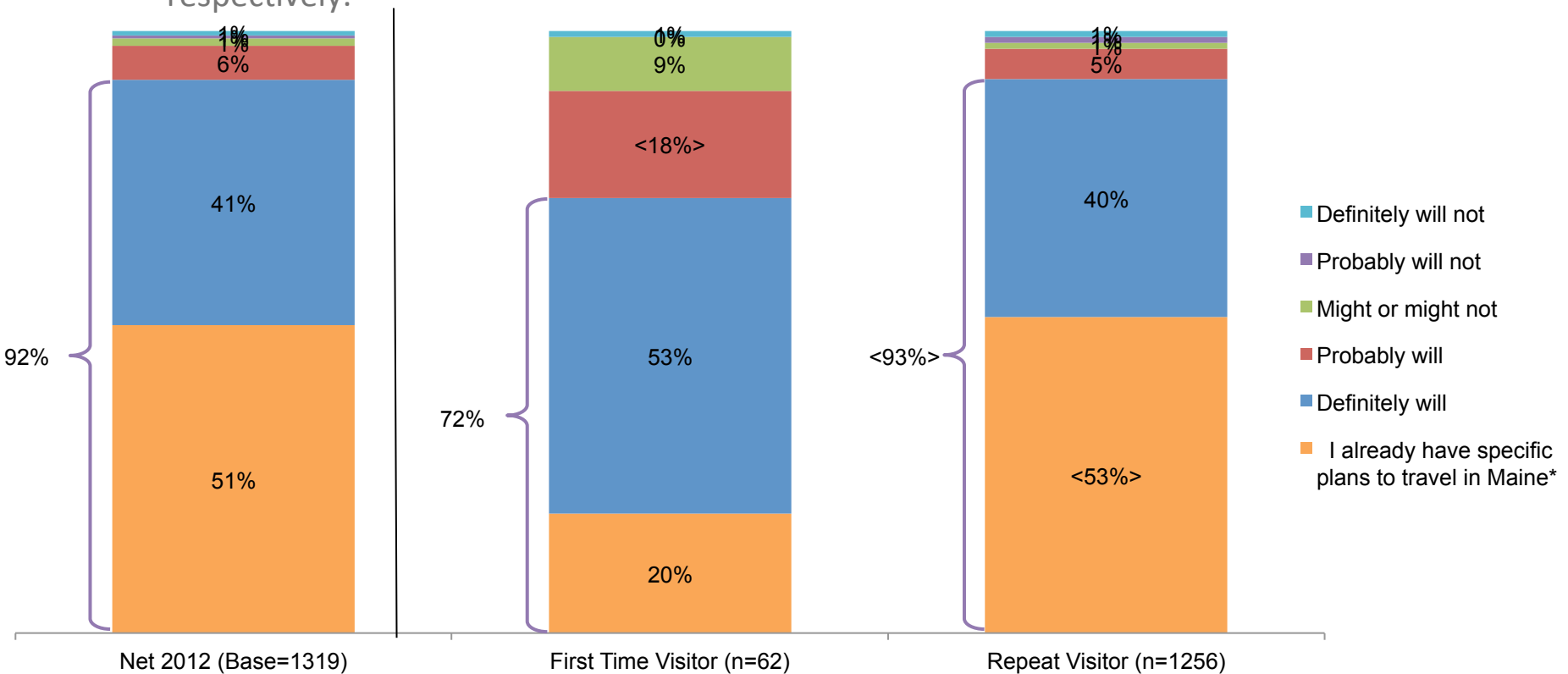
*Added Summer 2012.

< > indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Future Travel in Maine – Day Trippers

- Similar to overnight visitors, repeat day visitors appear more likely to travel to Maine in the future than first-time day visitors. More than half of repeat day visitors *already have specific plans to travel in Maine* and an additional 40% report that they definitely will travel in Maine. This compares to 20% and 53% of first-time day visitors, respectively.



Demographic Profile



Visitor Demographics

- The overall demographic profile of visitors to Maine hasn't shifted dramatically between 2011 and 2012, though this year did see a slight increase in age and household income of both day and overnight visitors to Maine.

	Overnight Visitors		Day Visitors	
	2011 (n=2954)	2012 (n=2497)	2011 (n=1780)	2012 (n=1520)
Age:				
< 35	31%	26%▼	27%	24%▼
35 - 44	18%	17%	16%	16%
45 - 54	20%	21%	22%	21%
55 +	31%	36%▲	35%	39%▲
Mean Age (Years)	44.6	47.3	46.3	47.8▲
Income:				
< \$50,000	13%	11%	21%	16%▼
\$50,000 - \$99,000	33%	32%	45%	42%
\$100,000 +	40%	43%▲	34%	41%▲
Mean Income (Thousands)	\$109,800	\$113,620	\$93,400	\$101,380
Female	54%	48%▼	64%	49%▼
College Degree or Higher	78%	80%	71%	73%
Married	58%	60%	60%	62%
Employed Full Time	65%	62%▼	61%	63%

Conclusions



Conclusions

- Though the proportion of U.S. residents taking an overnight trip within the U.S. dropped slightly in 2012, Maine visitation was stable for the year, with an increase in overnight tourism-related visitation estimates from 2011 to 2012. This increase in overnight visitation helped to offset a drop in average visitor spending, leading to a modest increase in total direct tourism expenditures for the year.
- Poor snow conditions in early 2012, a rainy June, and Hurricane Sandy impacting a large portion of Maine's target market all presented challenges in 2012. In addition, gas prices continued their ascent after a dip during spring and early summer, and the Travel Price Index continued to rise nationally. Yet, Maine still attracted more overnight visitors this year, visitors who express strong intent to return to Maine and recommend the State to others.

Conclusions

- Massachusetts continues to send the largest share of both overnight and day visitors to Maine. In addition, visitation levels from Massachusetts are consistent across the seasons – from summertime beach-goers to autumn leaf-peepers and winter skiers. Maine’s continued presence in the minds of Massachusetts residents is crucial in order to maintain this solid local market. As Massachusetts overnight visitors are more likely to be repeat visitors, there is an opportunity to tap an even greater pool of these visitors by attracting more first-time overnight visitors to Maine from Massachusetts.
- Canadian visitation to the State increased in 2012, presenting another core drive market for Maine. In addition to spending the bulk of their money shopping, these visitors are more likely than U.S. residents to stay in paid accommodations while visiting Maine and they stay longer – both components for providing more revenue for the State’s lodging properties. When asked to rate Maine in comparison to other destinations, however, Canadian visitors do not rate the State as favorably as do U.S. residents. It is important that Maine’s variety of all-season activities be stressed with this core opportunity market for Maine, promoting a year-round destination on their doorstep.

Conclusions

- Even more so than before, Maine must maintain a strong online presence as the Internet remains the most widely used trip planning source for overnight trips to Maine. Potential visitors are using online resources to select vacation destinations, and then using these same resources for planning their trip. In addition, travelers' mobile devices continue to grow as a prime information source for the destination while on vacation, underscoring the importance of Maine having a strong mobile presence as well.



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