

# Maine Office of Tourism Visitor Tracking Research 2015 Calendar Year Annual Report

*Prepared by*



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# Research Objectives and Methodology



# Research Objectives

- 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 and habits;
  - Explore perceptions of Maine among visitors;
  - Learn about visitors' travel planning practices;
  - Describe both seasonal and regional visitation patterns of Maine visitors;
  - Estimate the number of visitors coming to Maine; and
  - Estimate levels of spending in Maine.

# Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from two national online panels – Research Now and Instantly (formerly uSamp).
- Information is gathered using three main surveys on an ongoing basis:
  - **Maine Overnight Visitor Survey**
    - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada; and
    - Have taken an overnight trip to Maine in the past four weeks.
  - **Maine Day Visitor Survey**
    - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders; and
    - 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 2015, with travel occurring between December 2014 and November 2015.
- Data collection occurred monthly between January 5 and December 15, 2015. The number of completed surveys collected for each research component are as follows:
  - Maine Overnight Visitor Survey – 2,779
  - Maine Day Visitor – 1,755
  - National Omnibus Survey – 17,812
- Throughout this report, the acronym VFR stands for “visiting friends or relatives.”
- *Statistical significance between subgroups was calculated at the 95% confidence level and is noted throughout by <> or a/b/c/etc.*
- *A statistically significant **increase** from the previous year is indicated throughout by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.*

# 2015 in Context



# The first months of 2015 brought snow and cold to parts of the Northeast, breaking records for snowfall totals and cold temperatures.

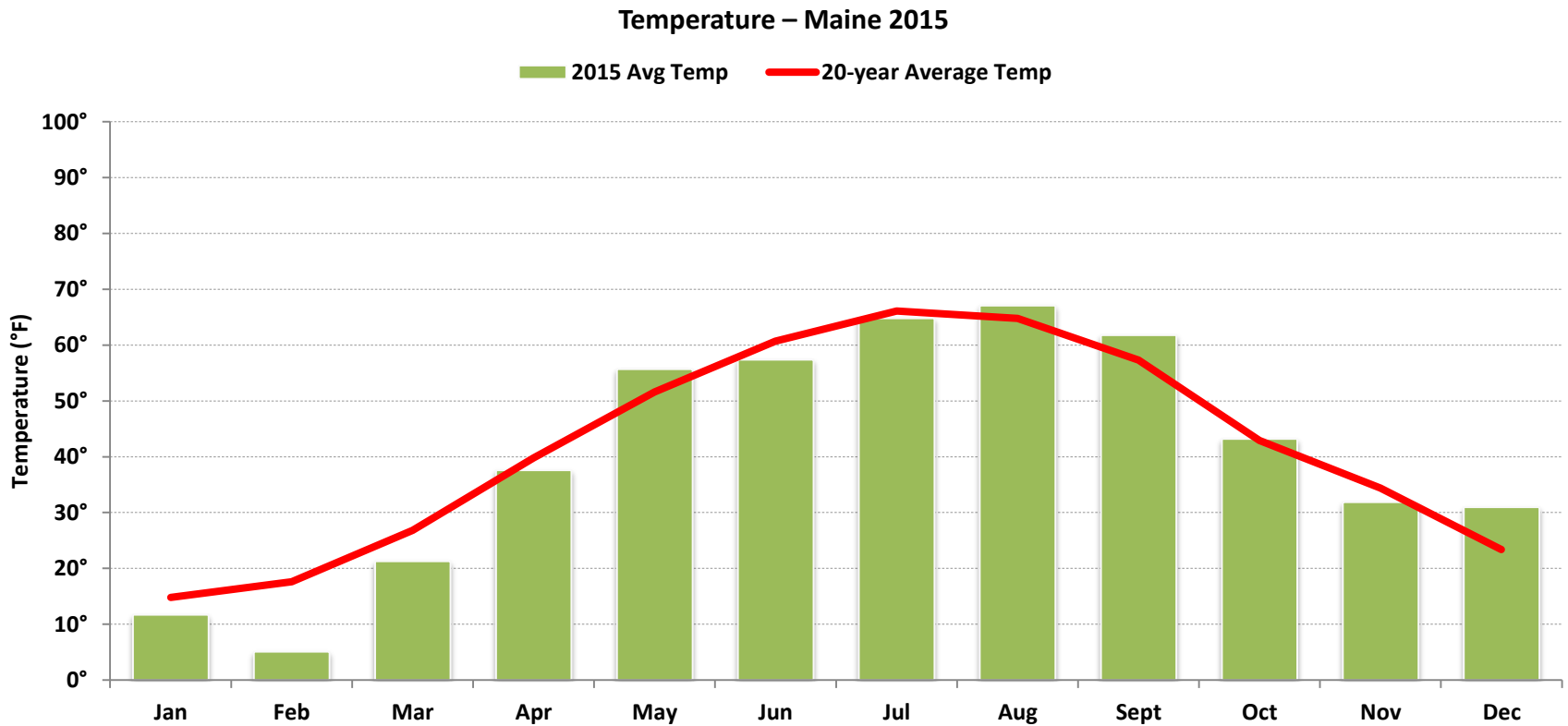
- Boston, Providence, and Worcester all set snowfall records for their respective cities, while Bangor had the 2<sup>nd</sup> highest snowfall season on record at 139 inches.





# Though 2015 started off cold, with temperatures below average for the first three months, the year ended with an atypically warm December.

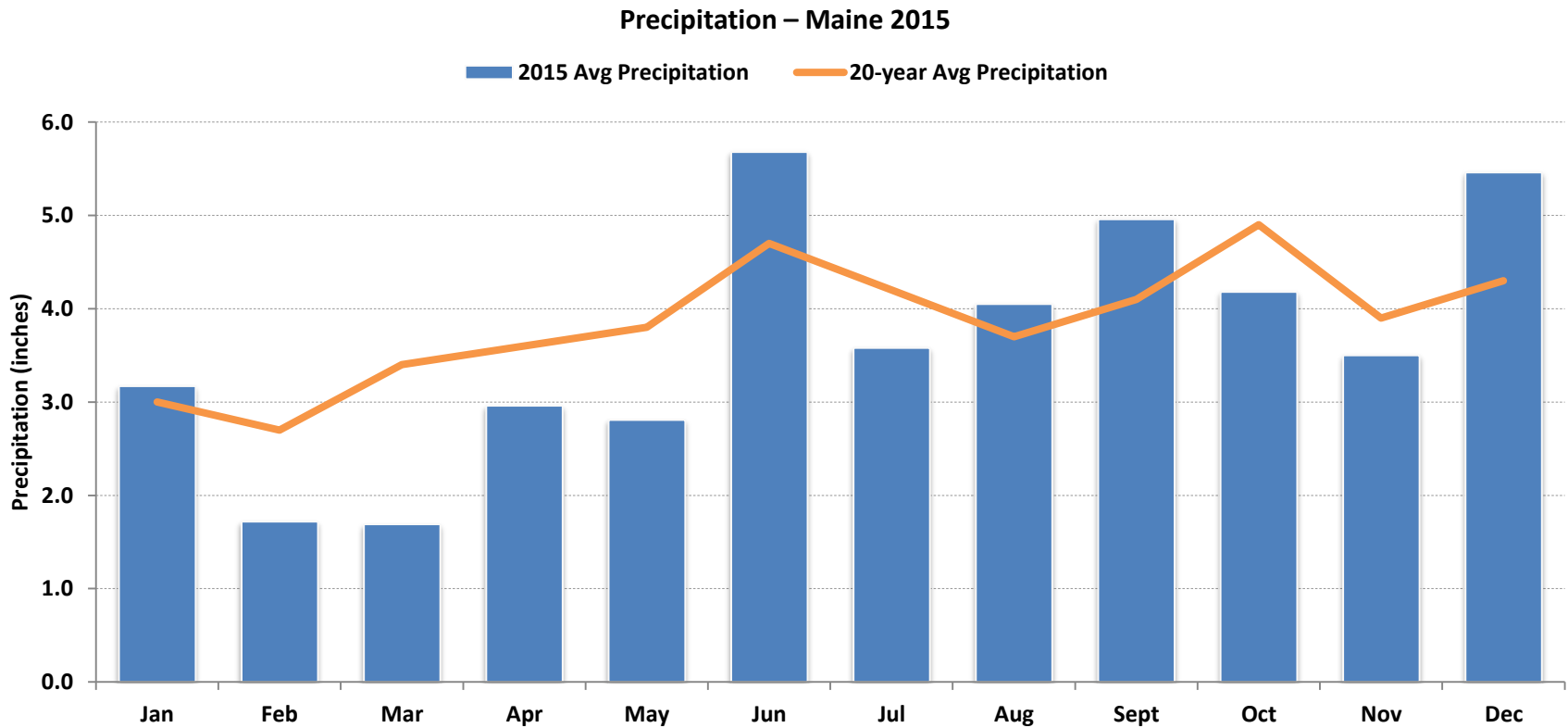
- 2015 spring and summer temperatures in Maine were pretty much comparable to the 20-year average for the State.



Data source: NOAA.gov

## Precipitation in Maine varied from the 20-year average during most months of 2015 – some above and some below.

- 2015 brought higher than normal amounts of precipitation in June, August, September, and December, and lower than average amounts for most of the remaining months.

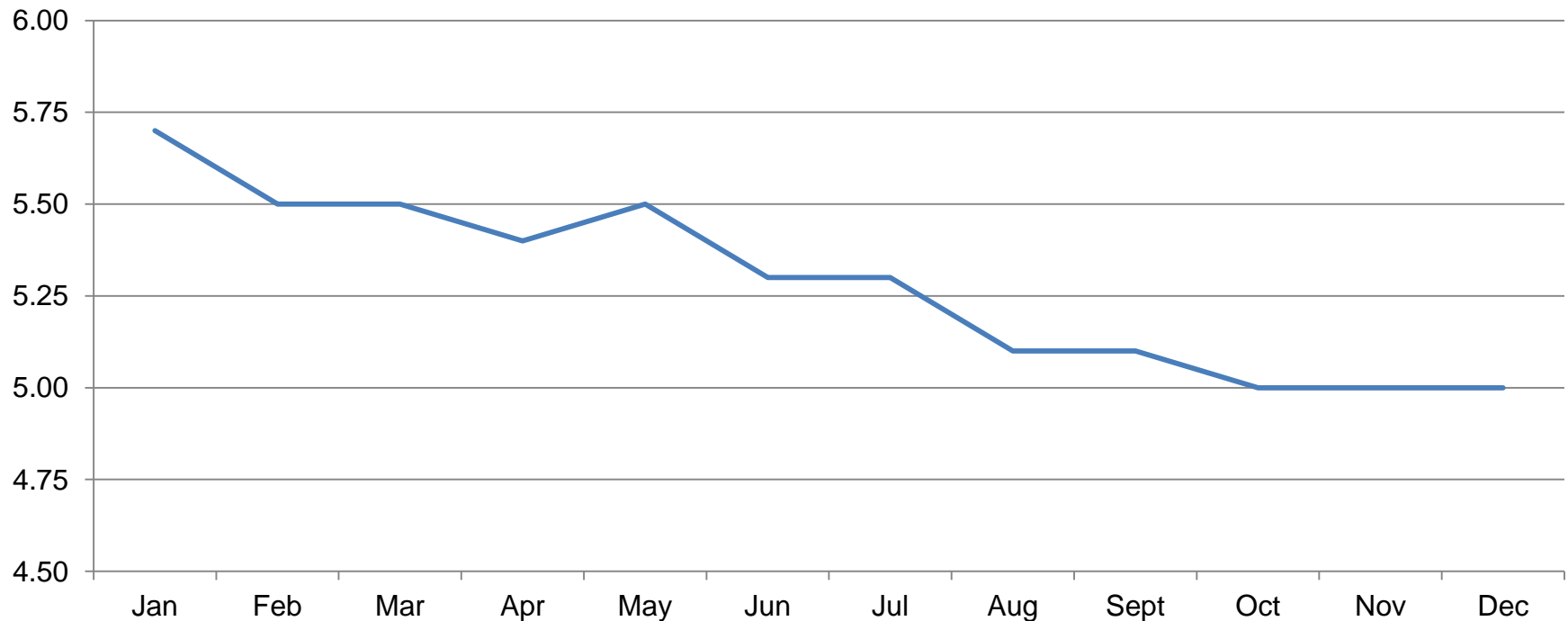


Data source: NOAA.gov

# 2015 unemployment rate fell to its lowest level since April 2008.

- The unemployment level continued the decline seen from 2013 through 2014, ending 2015 at 5.0%.

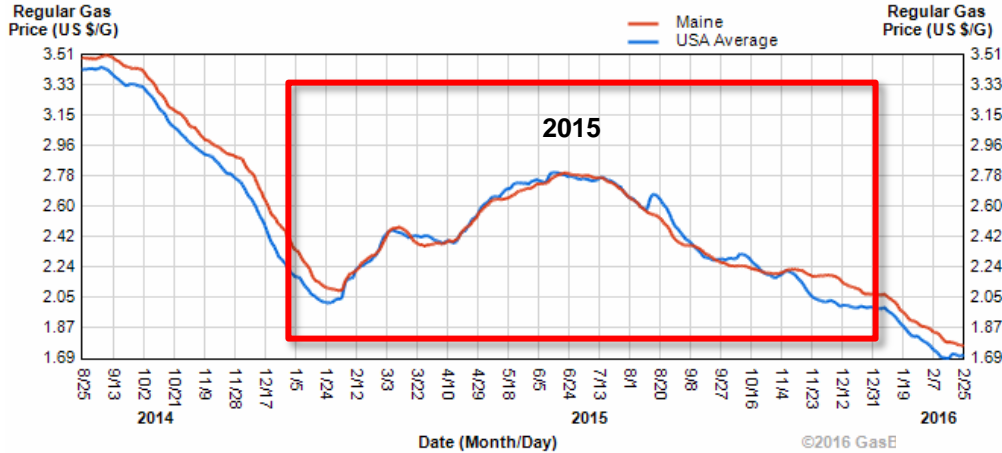
### 2015 United States Unemployment Rate by Month



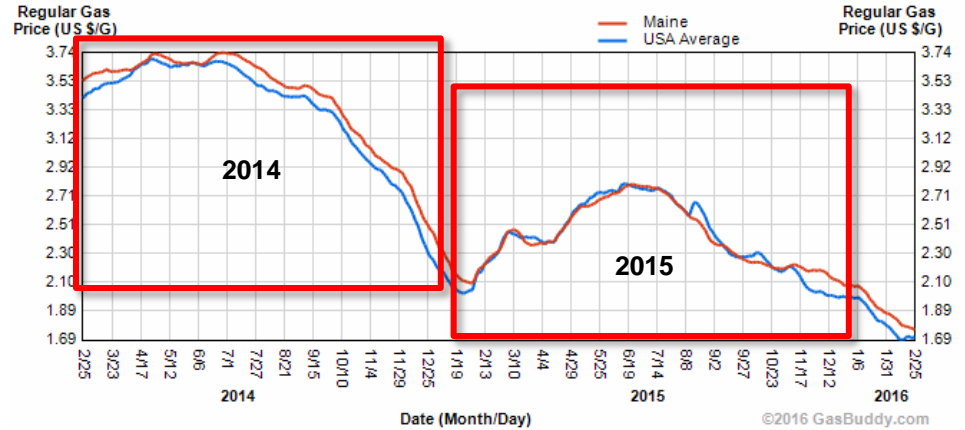
# Gas prices continued the descent begun in late 2014, maintaining a lower average price for 2015.

- Maine's gasoline prices were about equal to the national average for most of 2015, with the exception of January and November/December, when gasoline in Maine cost more than the national average.

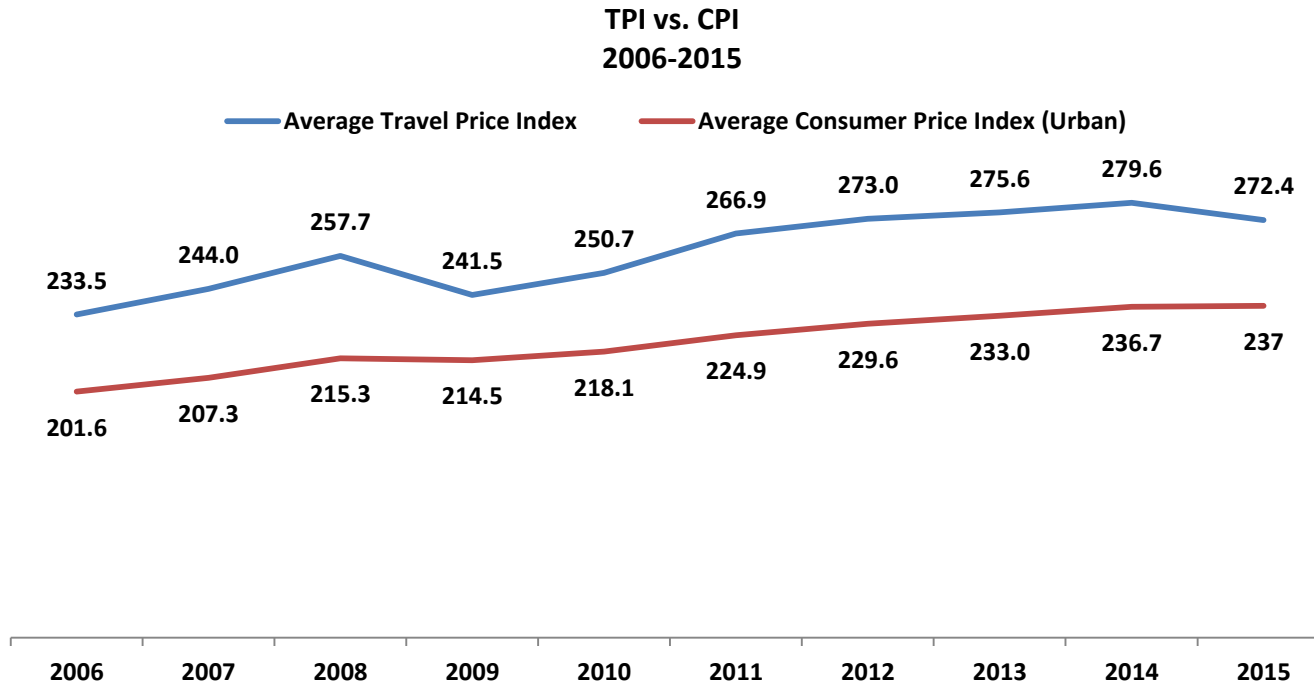
18 Month Average Retail Price Chart



24 Month Average Retail Price Chart



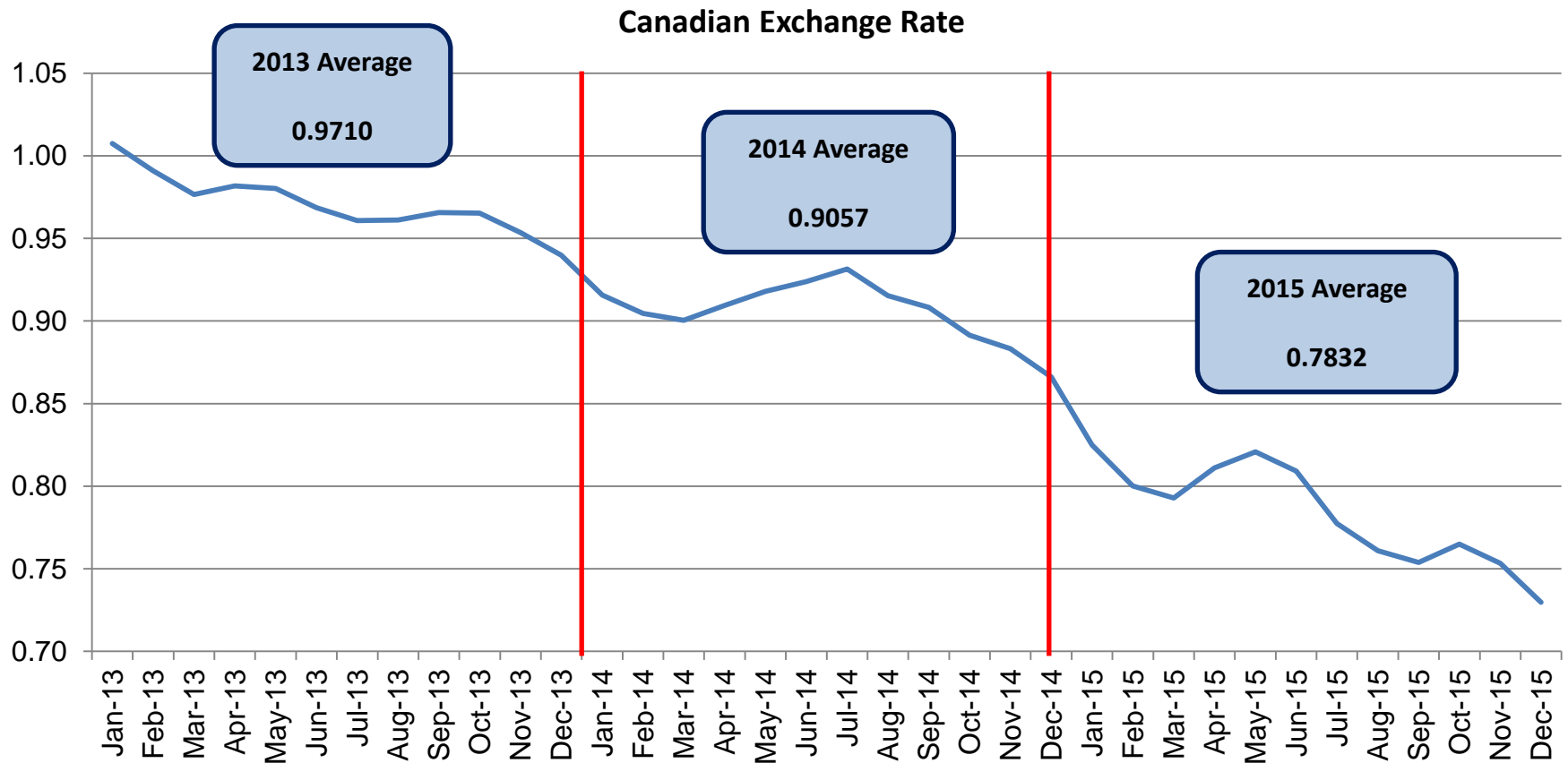
# Still exceeding the Consumer Price Index and indicating a relatively high cost of travel, the Travel Price Index\* showed its first year-over-year decrease since 2009.



\*"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

# The Canadian exchange rate continued its sharp decline, closing out 2015 at an average of 0.78 for the year.



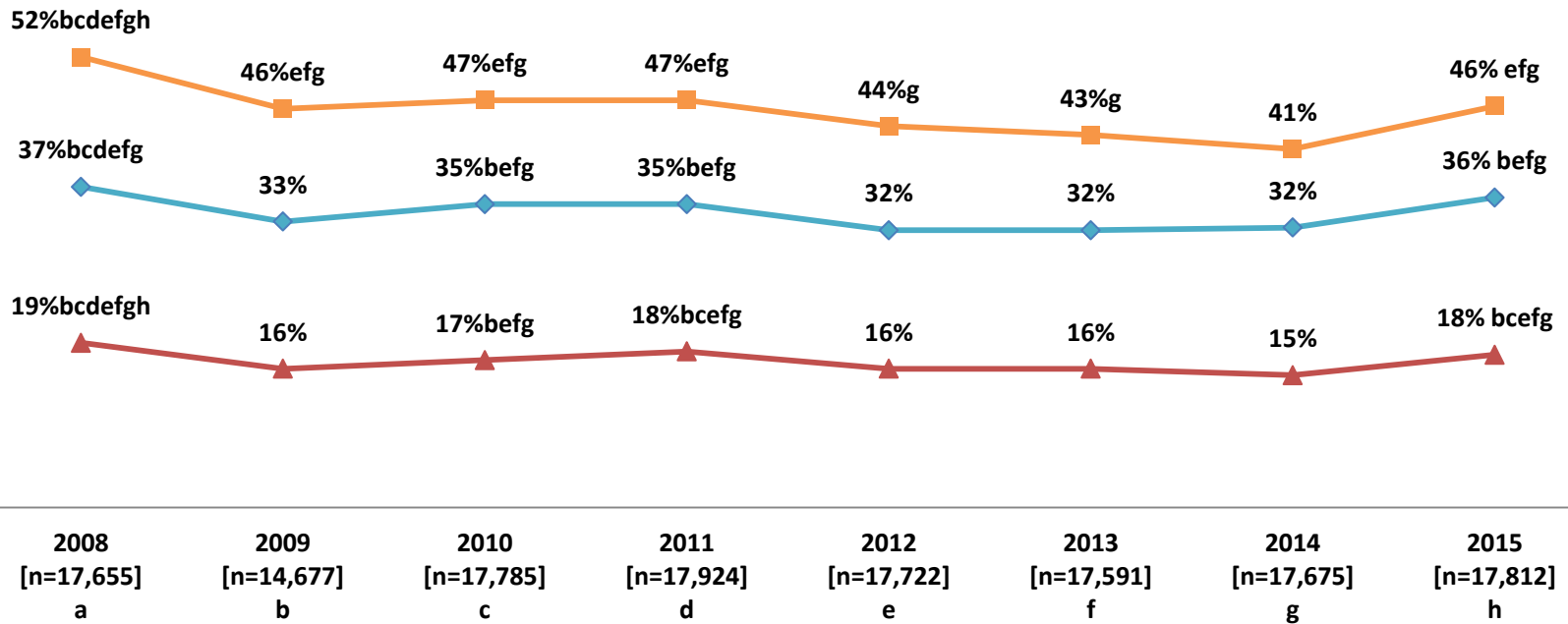
# Baseline Visitor Statistics



# Overnight travel among U.S. residents increased for the first time in three years, inching back toward levels seen in 2008.

Proportion of U.S. Residents Taking a Trip

◆ Overnight leisure trip    ■ Overnight VFR trip    ▲ Overnight business trip

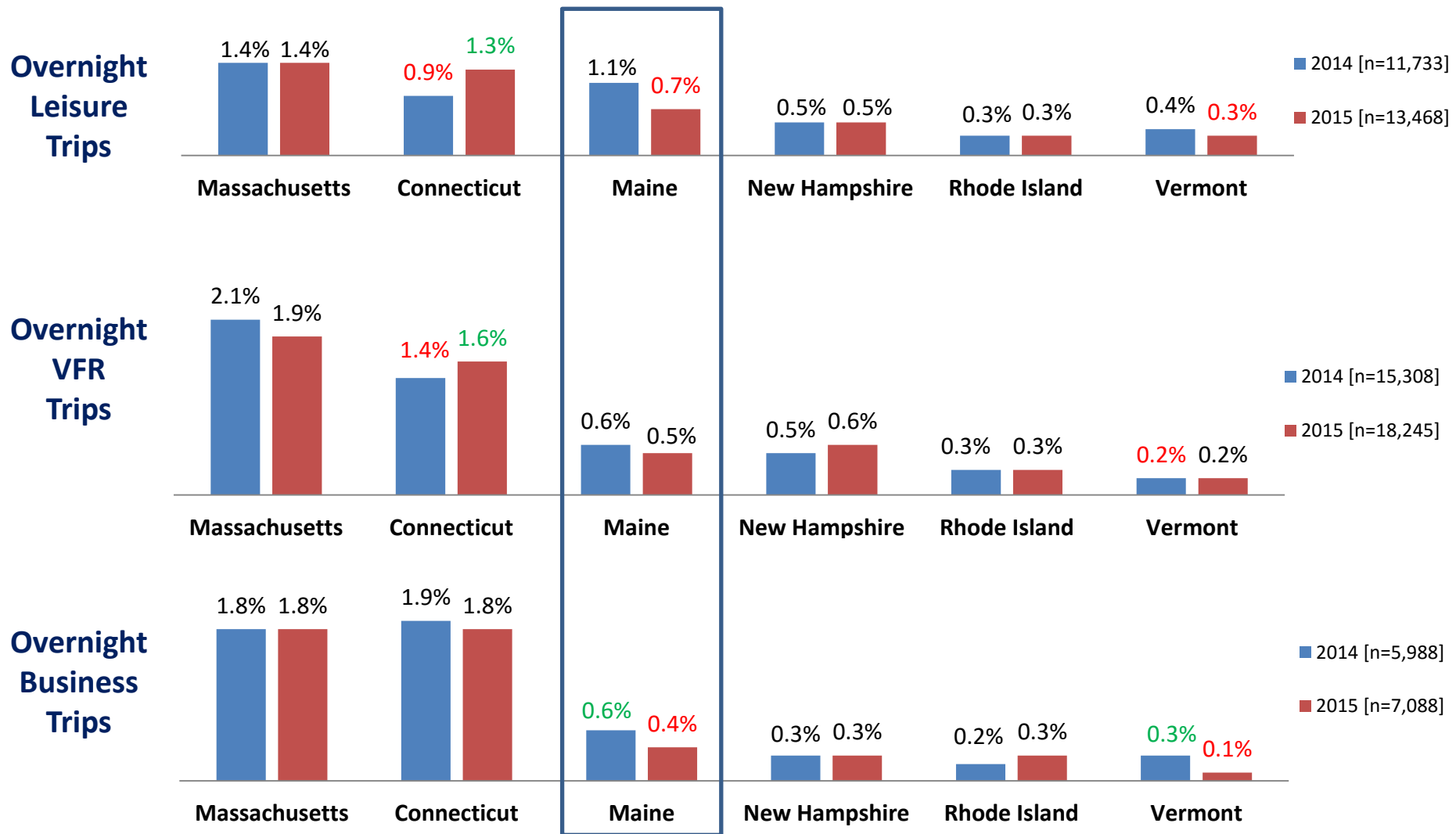


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.



# Maine continues to hold on to about 1% of the national overnight leisure travel market.



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.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Maine's estimated overnight visitation\* was up 4% over 2014, with the greatest year-over-year percentage increase seen during the Fall season.

- This is the second year in a row where the Fall season showed the greatest year-over-year percentage increase in overnight visitation.

## Tourism-Related Overnight Visitation

	2014 Total	2015				Y/Y % Difference
		Total	Leisure	VFR	Business	
<b>NET Visitors</b>	<b>17,275,070</b>	<b>17,972,749</b>	<b>9,195,987</b>	<b>7,619,290</b>	<b>1,157,471</b>	<b>4.0%</b>
Winter	2,940,349	3,003,827	1,737,157	1,030,233	236,437	2.2%
Summer	9,153,821	9,264,398	5,218,148	3,440,246	606,004	1.2%
Fall	5,180,900	5,704,524	2,240,682	3,148,812	315,030	10.1%
<b>NET Trips</b>	<b>5,821,662</b>	<b>6,436,646</b>	<b>3,170,357</b>	<b>2,815,076</b>	<b>451,214</b>	<b>10.6%</b>
Winter	900,761	1,062,710	601,092	369,259	92,358	18.0%
Summer	3,046,174	3,141,334	1,739,383	1,186,292	215,660	3.1%
Fall	1,874,727	2,232,602	829,882	1,259,525	143,196	19.1%

\*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.

**Maine's estimated day visitation\* was up more than 4% over 2014, with the greatest year-over-year percentage increase seen during the Fall season.**

## Tourism-Related Day Visitation

	2014 Total	2015				Y/Y % Difference
		Total	Leisure	VFR	Business	
<b>NET Visitors</b>	<b>20,619,830</b>	<b>21,563,121</b>	<b>13,565,947</b>	<b>7,376,388</b>	<b>620,786</b>	<b>4.6%</b>
Winter	2,663,407	2,542,307	1,602,845	845,565	93,897	-4.5%
Summer	14,485,424	15,198,059	9,634,824	5,156,273	406,962	4.9%
Fall	3,471,000	3,822,755	2,328,278	1,374,550	119,927	10.1%
<b>NET Trips</b>	<b>7,520,635</b>	<b>7,702,849</b>	<b>4,814,975</b>	<b>2,630,471</b>	<b>257,403</b>	<b>2.4%</b>
Winter	949,777	925,825	562,402	323,970	39,452	-2.5%
Summer	5,361,931	5,336,110	3,357,082	1,815,590	163,439	-0.5%
Fall	1,208,927	1,440,914	895,491	490,911	54,512	19.2%

\*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.

# Visitors spent more than \$5.6 billion in Maine during 2015, 3.2% more than in 2014.

- Lodging, food expenditures, and retail sales comprised the highest proportions of visitor spending.

Direct Tourism Expenditures Tourism Related Trips*	Total 2014	Total 2015	Winter/Spring 2015	Summer 2015	Fall 2015	Y/Y % Difference
NET Spending	\$5,470,654,093	\$5,645,524,402	\$861,305,546	\$3,019,695,740	\$1,764,523,115	3.2%
Lodging	\$1,505,195,347	\$1,645,071,621	\$250,979,220	\$879,921,051	\$514,171,350	9.3%
Restaurant/Food	\$1,476,890,903	\$1,505,910,031	\$229,748,128	\$805,485,865	\$470,676,038	2.0%
Retail Sales	\$1,470,663,741	\$1,478,307,803	\$225,537,013	\$790,721,899	\$462,048,891	0.5%
Recreation	\$447,480,128	\$505,656,269	\$77,145,101	\$270,467,006	\$158,044,162	13.0%
Gasoline	\$524,903,339	\$463,985,391	\$70,787,612	\$248,177,956	\$145,019,823	-11.6%
Transportation	\$45,520,635	\$46,593,287	\$7,108,473	\$24,921,963	\$14,562,851	2.4%

\*For the purposes of expenditure estimates, visitors are defined as all overnight visitors and all out of state day 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.

# Overnight Trip Planning



# The Internet and the advice of family/friends remain the most widely used overnight trip planning resources.

- The type of trip these travelers are taking impacts the sources they consult for planning, with business travelers being more likely than leisure and VFR travelers to consult many of these sources.
- Leisure travelers are most likely (and significantly more so than VFR or business travelers) to use the Internet when planning this recent trip to Maine.

Sources Used	NET 2015 (n=2779)	Leisure (n=1249) [a]	VFR (n=1036) [b]	Business (n=494) [c]	Winter (n=458) [d]	Summer (n=1336) [e]	Fall (n=985) [f]
The Internet	65%	75% bc	54%	65% b	61%	66% d	67% d
Friends/relatives/co-workers' advice	44%	39%	54% ac	35%	45%	44%	44%
Social Media such as Facebook, Twitter, etc.	20%	17%	19%	31% ab	21%	18%	23% e
Travel guides/brochures	20%	22% b	15%	26% b	20%	19%	21%
AAA	18%	19%	16%	20%	18%	18%	18%
Travel planning apps	14%	11%	10%	28% ab	11%	12%	16% de
Travel magazines	13%	12%	9%	21% ab	15% e	11%	14% e
State tourism office	12%	12% b	8%	21% ab	14%	11%	12%
Travel books	11%	12% b	7%	19% ab	11%	12%	11%
Articles or travelogues	8%	8%	6%	12% ab	8%	8%	8%
Local convention and visitors bureaus	7%	7% b	4%	15% ab	8%	6%	9%
Travel agent	6%	4%	4%	16% ab	8%	5%	7%
Local Chambers of Commerce	6%	6% b	3%	9% b	7%	5%	6%
Other	8%	7% c	12% ac	4%	9%	7%	10%
<b>AVERAGE # OF ITEMS SELECTED</b>	<b>2.5</b>	<b>2.5 b</b>	<b>2.2</b>	<b>3.2 ab</b>	<b>2.6</b>	<b>2.4</b>	<b>2.7 e</b>

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Visitors from outside New England are more likely to consult multiple sources when planning their overnight trip.

- As expected, first-time visitors to Maine are also more likely than repeat visitors to utilize many of these information sources when planning their trip to Maine.

Sources Used	NET 2015 (n=2779)	Residence				Repeat Visitation	
		Maine (n=282) [a]	New England (n=1033) [b]	Other US (n=1115) [c]	Canada (n=350) [d]	First Time (n=557) [e]	Repeat (n=2223) [f]
The Internet	65%	53%	62% ad	70% ab	72% a	67%	65%
Friends/relatives/co-workers' advice	44%	38%	46% d	44%	39%	44%	44%
Social Media such as Facebook, Twitter, etc.	20%	17%	14%	28% abd	16%	32% f	17%
Travel guides/brochures	20%	7%	14% a	30% abd	19% ab	26% f	19%
AAA	18%	13%	20% ad	20% ad	9%	24% f	16%
Travel planning apps	14%	4%	9% a	21% abd	11% a	25% f	11%
Travel magazines	13%	6%	8%	18% abd	12% ab	22% f	10%
State tourism office	12%	7%	8%	16% ab	14% ab	17% f	11%
Travel books	11%	2%	8% a	18% abd	9% a	20% f	9%
Articles or travelogues	8%	5%	6%	11% abd	6%	13% f	7%
Local convention and visitors bureaus	7%	5%	5%	11% abd	7%	10% f	7%
Travel agent	6%	-	3%	10% b	10% b	15% f	4%
Local Chambers of Commerce	6%	5%	4%	7% b	5%	7%	5%
Other	8%	19% bcd	12% cd	3%	5%	1%	10% e
<b>AVERAGE # OF ITEMS SELECTED</b>	<b>2.5</b>	<b>1.8</b>	<b>2.2 a</b>	<b>3.1 abd</b>	<b>2.3</b>	<b>3.3 f</b>	<b>2.4</b>

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Younger visitors and those traveling with children are more likely to utilize multiple information sources when planning.

Sources Used	NET 2015 (n=2779)	Kids on Trip		Age			
		Yes (n=858) [a]	No (n=1922) [b]	<35 (n=840) [c]	35-44 (n=541) [d]	45-54 (n=531) [e]	55+ (n=867) [f]
The Internet	65%	67%	65%	69% f	72% f	67% f	58%
Friends/relatives/co-workers' advice	44%	51% b	41%	50% ef	49% ef	38%	38%
Social Media such as Facebook, Twitter, etc.	20%	30% b	16%	35% def	28% ef	12% f	6%
Travel guides/brochures	20%	28% b	17%	23% ef	28% ef	17%	14%
AAA	18%	21% b	16%	16%	19%	17%	19%
Travel planning apps	14%	21% b	10%	22% ef	18% ef	9%	5%
Travel magazines	13%	15% b	11%	17% ef	20% ef	6%	8%
State tourism office	12%	18% b	9%	15% ef	15% ef	8%	10%
Travel books	11%	16% b	9%	15% ef	16% ef	5%	9% e
Articles or travelogues	8%	10% b	7%	11% ef	12% ef	4%	6%
Local convention and visitors bureaus	7%	9%	7%	8%	10% ef	6%	6%
Travel agent	6%	8%	6%	10% ef	9% ef	5%	2%
Local Chambers of Commerce	6%	9% b	4%	7% e	6% e	3%	5%
Other	8%	3%	11% a	2%	3%	10% cd	17% cde
<b>AVERAGE # OF ITEMS SELECTED</b>	<b>2.5</b>	<b>3.1 b</b>	<b>2.3</b>	<b>3.0 ef</b>	<b>3.0 ef</b>	<b>2.1</b>	<b>2.0</b>

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# The usage of various overnight trip planning resources shows minor changes since 2008.

- After showing a trend of relative stability in previous years, *travel guides/brochures* was mentioned by a higher proportion of overnight visitors for the second year in a row, suggesting the continued importance of this printed information source for potential visitors.
- Since its addition to the survey instrument in 2012, *social media* had exhibited consistent increases in usage in 2013 and 2014, but appears to have stabilized between 2014 and 2015.

Sources Used	2008 (n=3320) a	2009 (n=3057) b	2010 (n=2992) c	2011 (n=2954) d	2012 (n=2497) e	2013 (n=2675) f	2014 (n=2930) g	2015 (n=2779) h
The Internet	66%	66%	66%	65%	63%	64%	64%	65%
Friends/ relatives/ co-workers' advice	49%	43%	42%	42%	35%	34%	45%	44%
Travel guides/ brochures	15%	16%	14%	15%	13%	12%	17%	20%
Social Media	n/a	n/a	n/a	n/a	8%	10%	18%	20%
AAA	21%	20%	20%	20%	18%	16%	16%	18%
Travel planning apps	n/a	n/a	n/a	n/a	n/a	n/a	11%	14%
Travel magazines	n/a	9%	9%	8%	8%	9%	12%	13%
State tourism office	n/a	n/a	n/a	n/a	n/a	n/a	11%	12%
Travel Books	13%	11%	10%	10%	8%	9%	10%	11%
Articles or travelogues	n/a	8%	7%	7%	7%	7%	7%	8%
Contact local convention and visitors bureaus	4%	5%	5%	5%	5%	5%	6%	7%
Contact local Chambers of Commerce	4%	5%	4%	4%	0%	6%	5%	6%
Travel agent	5%	6%	6%	4%	0%	4%	5%	6%

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# VisitMaine.com and Maine Tourism Region websites remain among the top 5 online trip planning websites used.

- *TripAdvisor, VisitMaine.com, Google Maps, various online search engines, and the various Maine Tourism Region websites remain the most frequently utilized online planning resources for overnight visitors to Maine.*

Websites Used	NET 2015 (n=1961)	Leisure (n=972) [a]	VFR (n=617) [b]	Business (n=371) [c]	Maine (n=166) [d]	New England (n=680) [e]	Other US (n=849) [f]
Any (NET)	94%	94%	93%	95%	87%	92%	97%de
TripAdvisor	42%	43% b	36%	50% ab	21%	39%d	49%de
<b>VisitMaine.com</b>	<b>34%</b>	<b>33%</b>	<b>31%</b>	<b>38%</b>	<b>23%</b>	<b>28%</b>	<b>41%de</b>
Google maps	31%	30%	31%	32%	20%	29%	34%d
Online search engines	30%	31%	30%	28%	22%	31%	31%
<b>Maine Tourism Region Websites (NET)</b>	<b>28%</b>	<b>25%</b>	<b>28%</b>	<b>36% ab</b>	<b>30%</b>	<b>27%</b>	<b>30%</b>
Facebook	27%	19%	32% a	41% ab	26%	21%	34%e
Lodging/hotel/accommodation websites	22%	26% bc	18%	16%	16%	26%df	20%
Booking websites	21%	20%	19%	27% ab	10%	16%	27%de
Mainetourism.com	17%	17%	15%	18%	12%	14%	20%de
Youtube	14%	11%	13%	24% ab	4%	7%	22%de
Google+	11%	8%	12%	18% ab	7%	9%	14%de
Twitter	9%	5%	8% a	21% ab	1%	4%	15%de
Travel blogs	9%	6%	8%	15% ab	1%	6%d	13%de
DiscoverNewEngland.com	8%	6%	9%	13% a	12%	7%	9%
Airline websites	6%	4%	5%	15% ab	2%	1%	11%de
Chambers of Commerce websites	6%	7% b	4%	8% b	4%	4%	9%e
Zagat	5%	3%	5%	11% ab	<1%	3%d	9%de
Convention and/or visitor bureau websites	4%	3%	3%	9% ab	4%	3%	5%e
Frommers	4%	3%	2%	7% ab	5%	3%	4%
Other Maine travel web sites (Please specify)	1%	2% b	<1%	-	3%	1%	1%
Other (Please specify)	6%	8% bc	4% c	2%	5%	7%	5%
Did not use any of the above	4%	4%	6%	4%	11%f	6%f	2%

Q17. Which of the following web sites did you visit when planning this trip in Maine?

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

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# First-time visitors, younger visitors, and those traveling with children are more likely to have consulted several online planning resources.

Websites Used	NET 2015 (n=1961)	First-Time Visitor (n=422) [a]	Repeat Visitor (n=1538) [b]	Kids on Trip (n=639) [c]	No Kids (n=1322) [d]	< 45 yrs (n=1070) [e]	45+ yrs (n=890) [f]
Any (NET)	94%	98%b	93%	97%d	93%	97%f	91%
TripAdvisor	42%	48%b	40%	47%d	40%	46%f	38%
<b>VisitMaine.com</b>	<b>34%</b>	<b>42%b</b>	<b>31%</b>	<b>43%d</b>	<b>29%</b>	<b>39%f</b>	<b>27%</b>
Google maps	31%	31%	31%	29%	32%	35%f	25%
Online search engines	30%	34%	29%	30%	30%	34%f	25%
<b>Maine Tourism Region Websites (NET)</b>	<b>28%</b>	<b>36%b</b>	<b>26%</b>	<b>38%d</b>	<b>23%</b>	<b>31%f</b>	<b>25%</b>
Facebook	27%	37%b	24%	39%d	21%	39%f	13%
Lodging/hotel/accommodation websites	22%	19%	22%	19%	23%	17%	27%e
Booking websites	21%	25%	20%	23%	20%	26%f	14%
Mainetourism.com	17%	22%b	15%	21%d	15%	18%	16%
Youtube	14%	24%b	11%	22%d	10%	22%f	5%
Google+	11%	15%b	10%	16%d	9%	14%f	8%
Twitter	9%	16%b	7%	14%d	7%	15%f	2%
Travel blogs	9%	17%b	7%	12%	7%	14%f	3%
DiscoverNewEngland.com	8%	14%b	6%	14%d	5%	11%f	5%
Airline websites	6%	11%b	5%	9%d	5%	9%f	4%
Chambers of Commerce websites	6%	6%	6%	7%	5%	5%	7%
Zagat	5%	8%b	4%	8%d	4%	7%f	3%
Convention and/or visitor bureau websites	4%	6%b	3%	5%	4%	5%f	2%
Frommers	4%	5%	3%	5%d	3%	4%	3%
Other Maine travel web sites (Please specify)	1%	1%	1%	<1%	2%c	1%	2%
Other (Please specify)	6%	3%	6%a	3%	7%c	3%	9%e
Did not use any of the above	4%	1%	5%a	2%	6%c	3%	6%e

Q17. Which of the following web sites did you visit when planning this trip in Maine?

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

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The majority of Maine overnight visitors did not consider other vacation destinations when planning this trip.

- Of the 26% who did consider other destinations, most of these were other New England states, New York, Florida, or the eastern Canadian provinces.

Other Destinations Considered	2015 (n=2779)
Didn't consider other destinations	72%
Any (NET)	26%
New Hampshire	7%
Vermont	4%
Massachusetts	4%
New York	2%
Florida	2%
Connecticut	1%
Rhode Island	1%
California	1%
Pennsylvania	1%
Quebec (PQ) – Montreal	1%
Nova Scotia (NS)	<1%
New Brunswick (NB)	<1%

First time visitors, those living outside New England, visitors staying in paid accommodations, visitors traveling with children, and visitors younger than 45 are all more likely than their counterparts to have considered other destinations.

Outside New England	Maine, New England
<35%>	19%
1 <sup>st</sup> time	Repeat
<42%>	23%
Paid Accommodations	Unpaid Accommodations
<29%>	20%
Kids on Trip	No Kids
<34%>	23%
18-44	45+
<33%>	20%

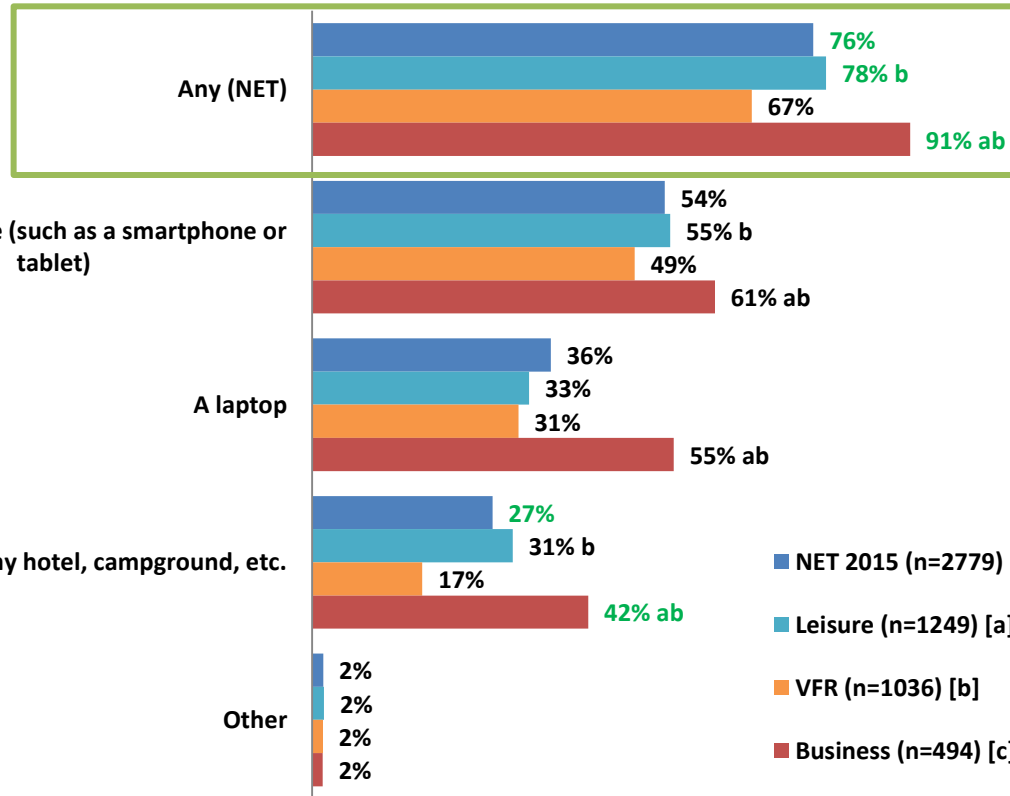
Q13. What other states or provinces, if any, did you consider for this specific trip?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year. <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Most overnight travelers continue their research after arriving in Maine, especially business travelers.

- 2015 showed an increase in the proportion of overnight visitors using materials from their *hotel, campground, etc.* to research the local area while in Maine (27% versus 24% in 2014). After showing large increases in usage between 2013 and 2014, *mobile devices* and *laptops* did not show any increase in 2015.
- Travelers who used their mobile device or laptop for additional research while in Maine reported mostly accessing apps/websites such as Google, TripAdvisor, or Google Maps.

Trip Research While in Maine



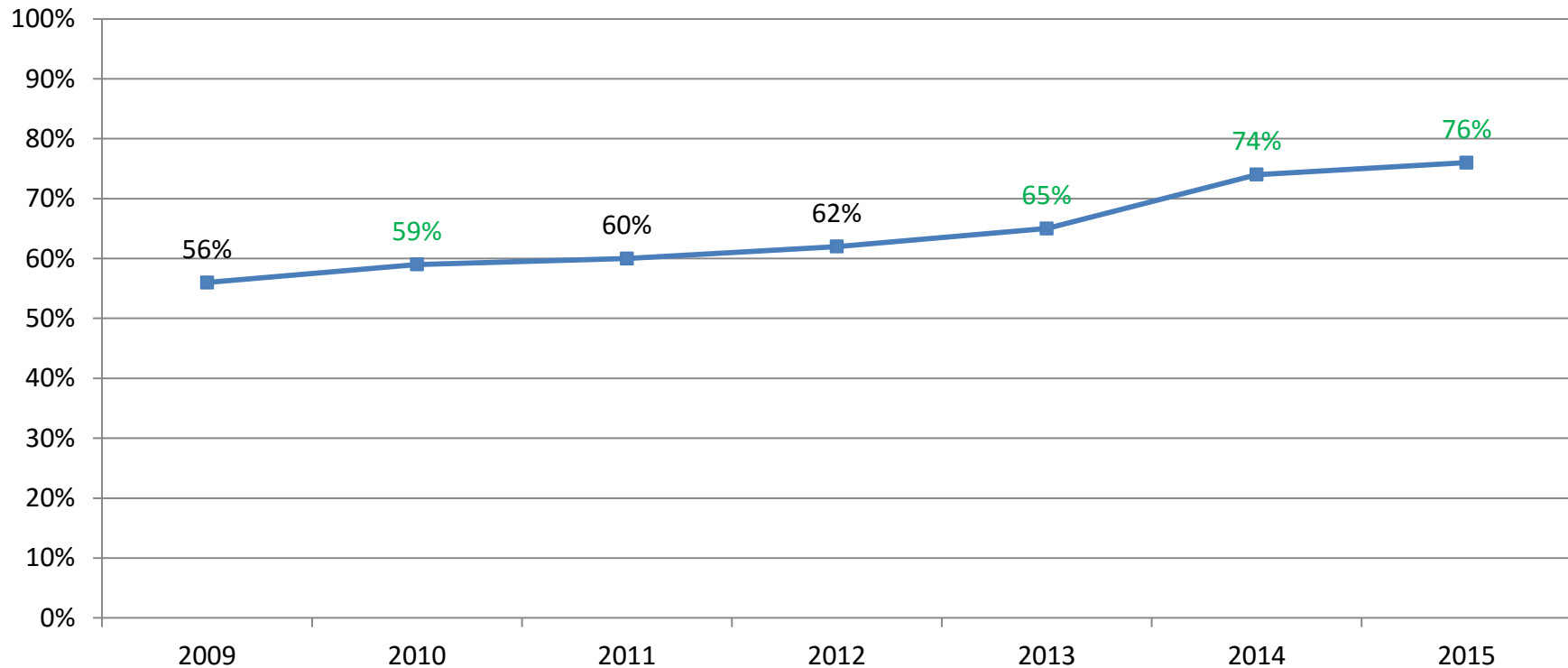
First time visitors, visitors staying in paid accommodations, visitors traveling with children, and visitors younger than 45 are all more likely than their counterparts to continue researching Maine while visiting.

1 <sup>st</sup> time	Repeat
<91%>	73%
Paid Accommodations	Unpaid Accommodations
<81%>	66%
Kids on Trip	No Kids
<86%>	72%
18-44	45+
<89%>	64%

Q27. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The percentage of visitors researching Maine while they are visiting the State has been increasing since 2009.

Percent Researching Maine During Visit  
2009 - 2015



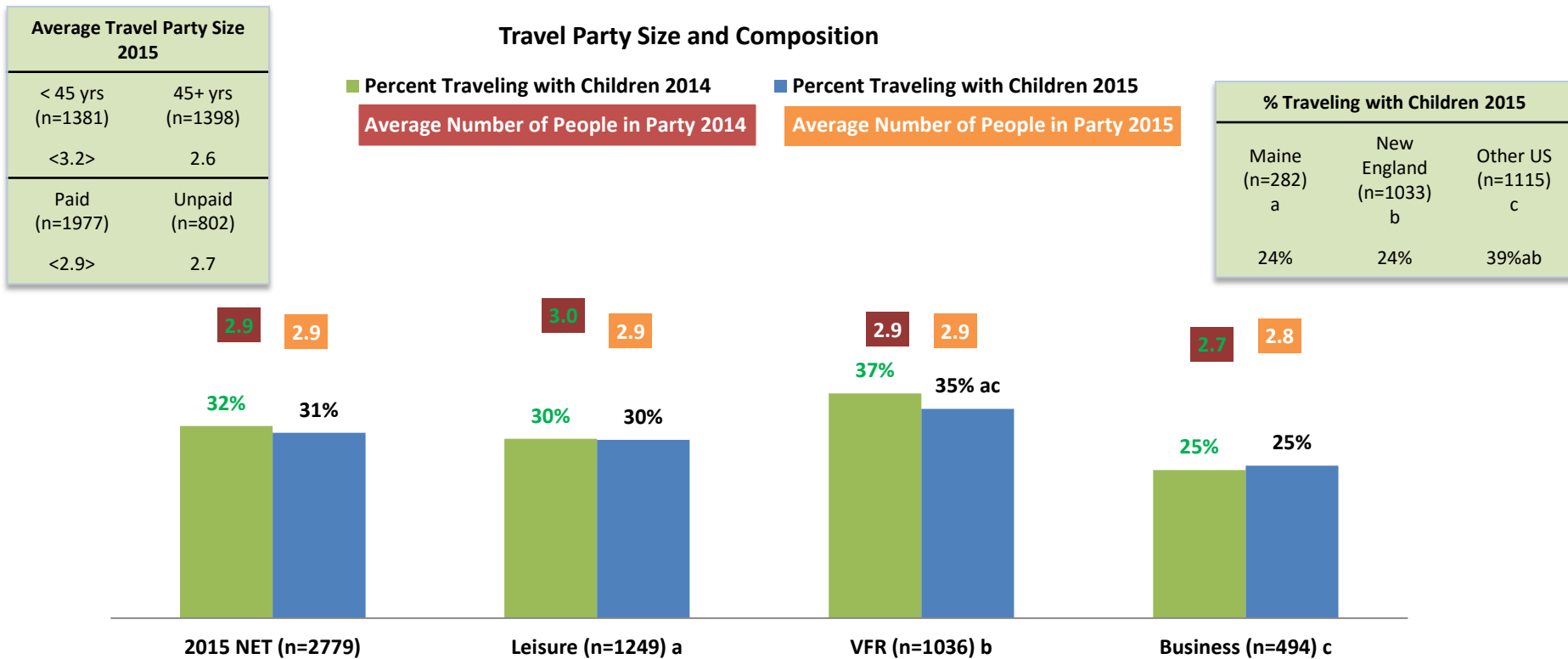
Q27. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight Visitor Travel Logistics



# On average, overnight visitors travel in parties of 3, and one-third bring children.

- Not surprisingly, VFR travelers were more likely to be traveling with kids (35%) than were leisure (30%) or business travelers (25%).
- Visitors from outside of New England, as well as first-time visitors, were also more likely to be traveling with children.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q19. How many of these people were: Children?

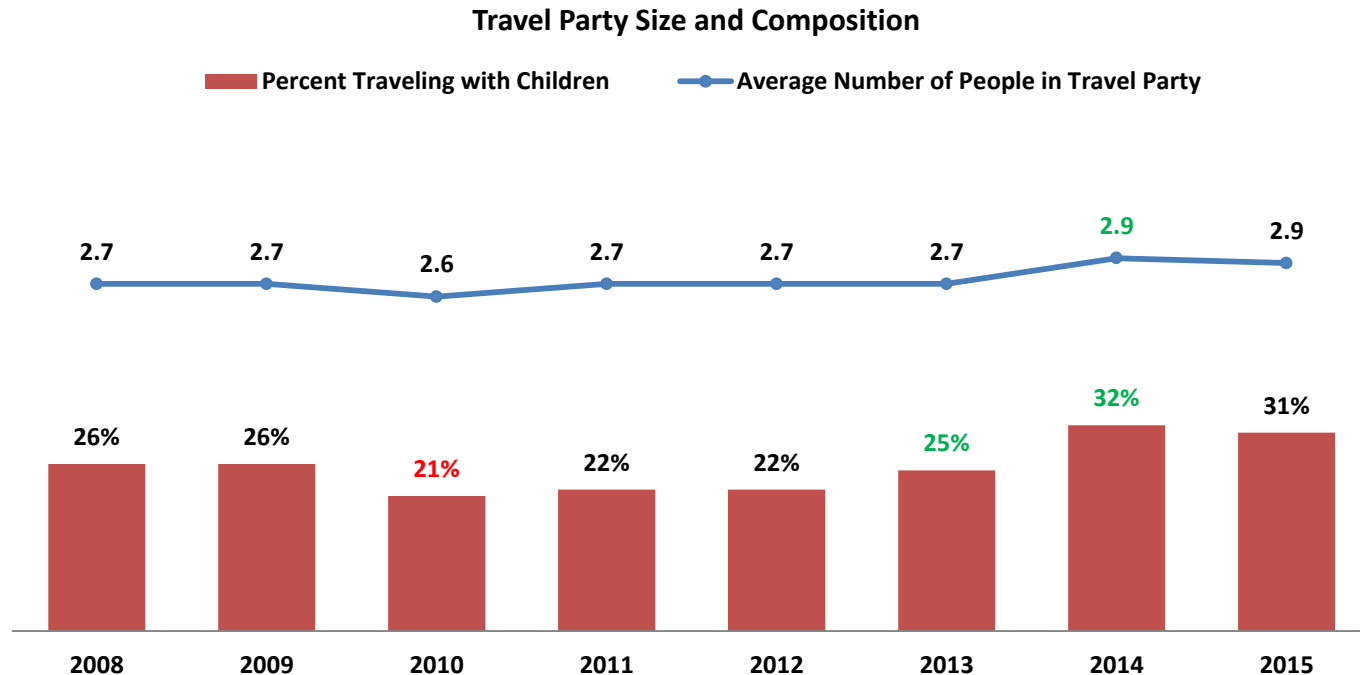
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# The proportion of overnight visitors traveling with children is consistent with last year.

- After two years of increases, the proportion of visitors traveling with children appears to have stabilized.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

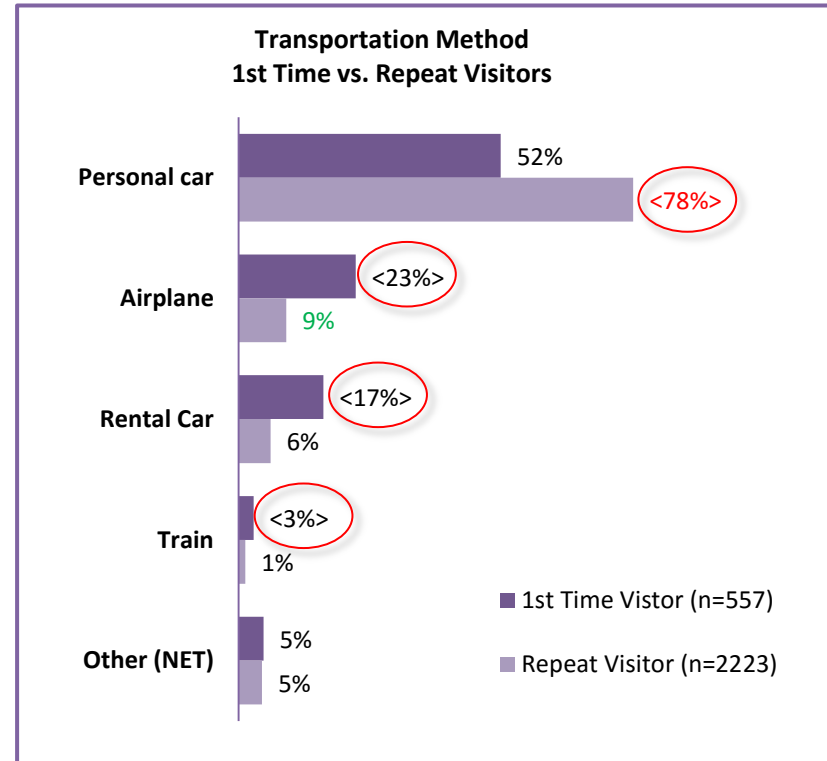
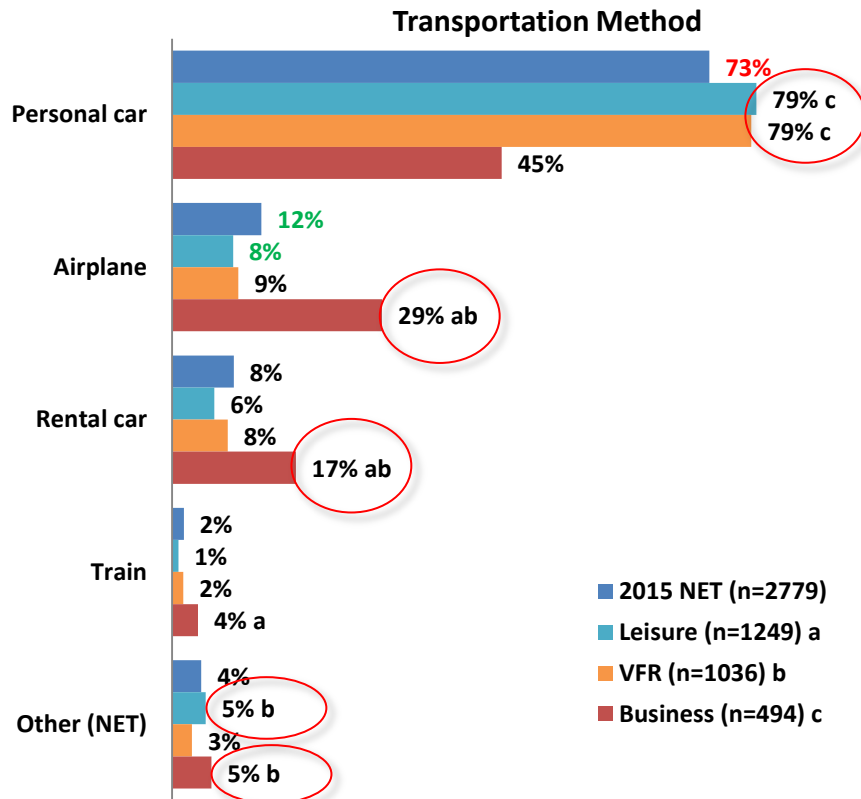
Q19. How many of these people were: Children?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The majority of overnight visitors use their personal car as a transportation mode, though slightly fewer than last year.

- Leisure and VFR travelers are the most likely to be using their personal car to travel to Maine, while business travelers are most likely to be arriving by airplane or rental car.
- Repeat visitors are more likely to use a personal car to travel to Maine, while first-time visitors are more likely to travel in a rental car or airplane.

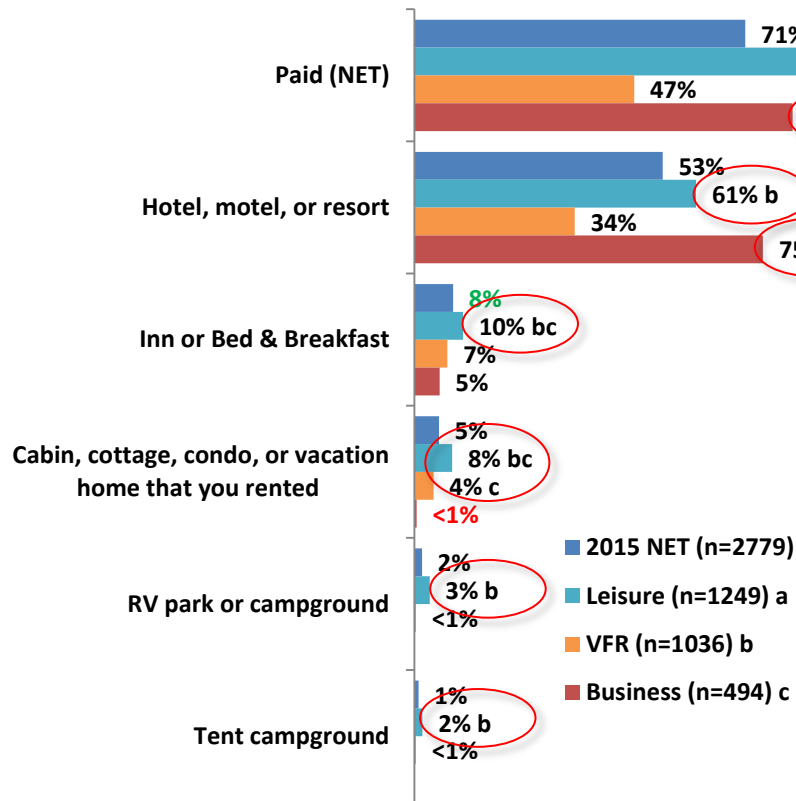


Q20. Which of the following types of transportation did you use to travel the most miles from your home to get to your Maine destination?  
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

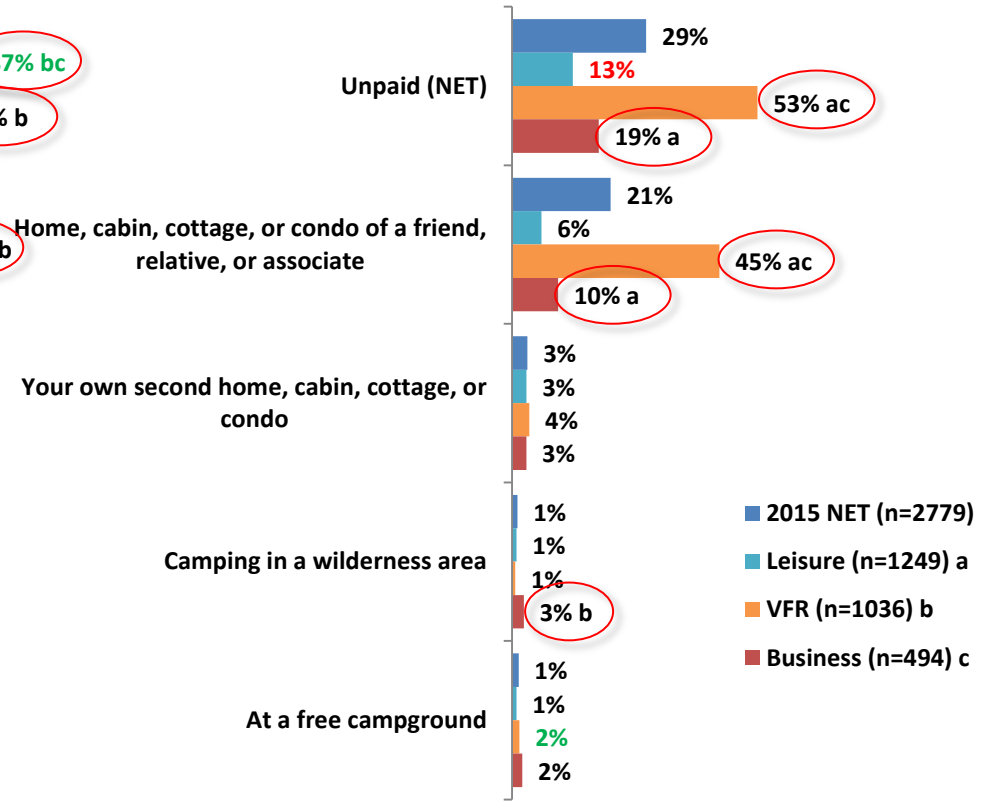
# Paid accommodations are the principal lodging choice for Maine's overnight visitors, primarily hotels/motels/resorts.

- As expected, leisure and business travelers are more likely to stay in paid accommodations, while VFR travelers are more likely to be staying in unpaid accommodations.
- Canadian visitors are more likely than US visitors to stay in paid accommodations (81% versus 70%). Conversely, US visitors are more likely than Canadians to stay in unpaid accommodations (30% versus 19%).

**Paid Accommodations**



**Unpaid Accommodations**



Q21. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

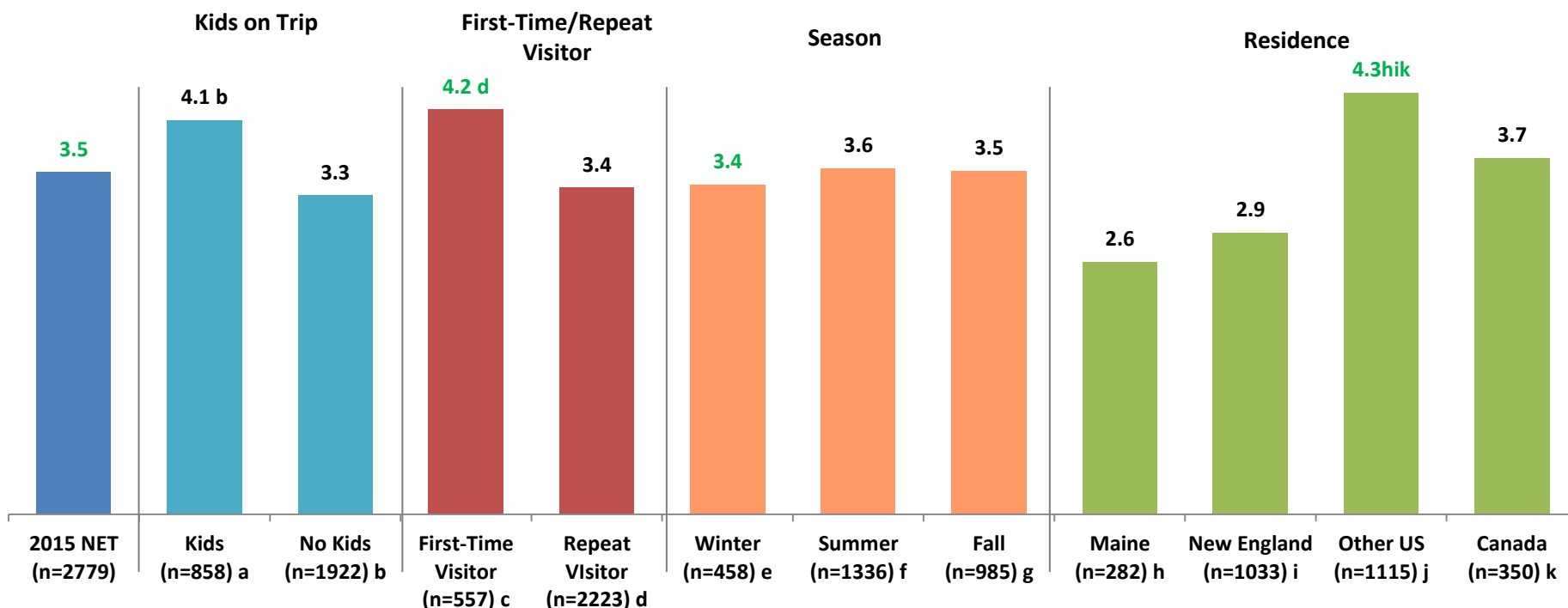
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The average length of stay among overnight visitors falls between 3 and 4 nights and is up from 2014.

- As shown in the chart below, length of stay was longest among those traveling with children, first time visitors, and domestic travelers from outside of New England.

### Average Nights Away from Home



Q10. On this trip to Maine, how many nights were you away from home?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

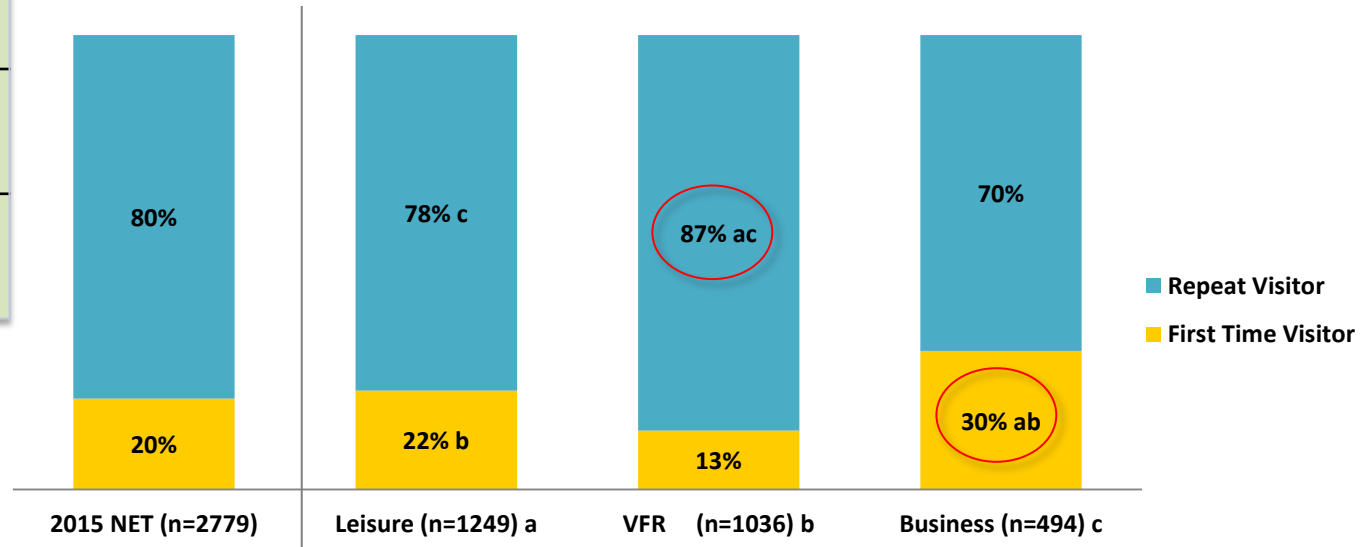
# One-fifth of Maine’s overnight visitors were visiting the State for the first time.

- These first-time visitors are more likely to be visiting for business or leisure.

Younger travelers, those staying in paid accommodations, and those traveling with children are all more likely to be visiting Maine for the first time.

< 45 yrs (n=1381)	45+ yrs (n=1398)
<31%>	9%
Paid Accom. (n=1977)	Unpaid Accom. (n=802)
<22%>	15%
Kids on Trip (n=858)	No Kids on Trip (n=1922)
<28%>	16%

### Repeat vs. First Time Visitors



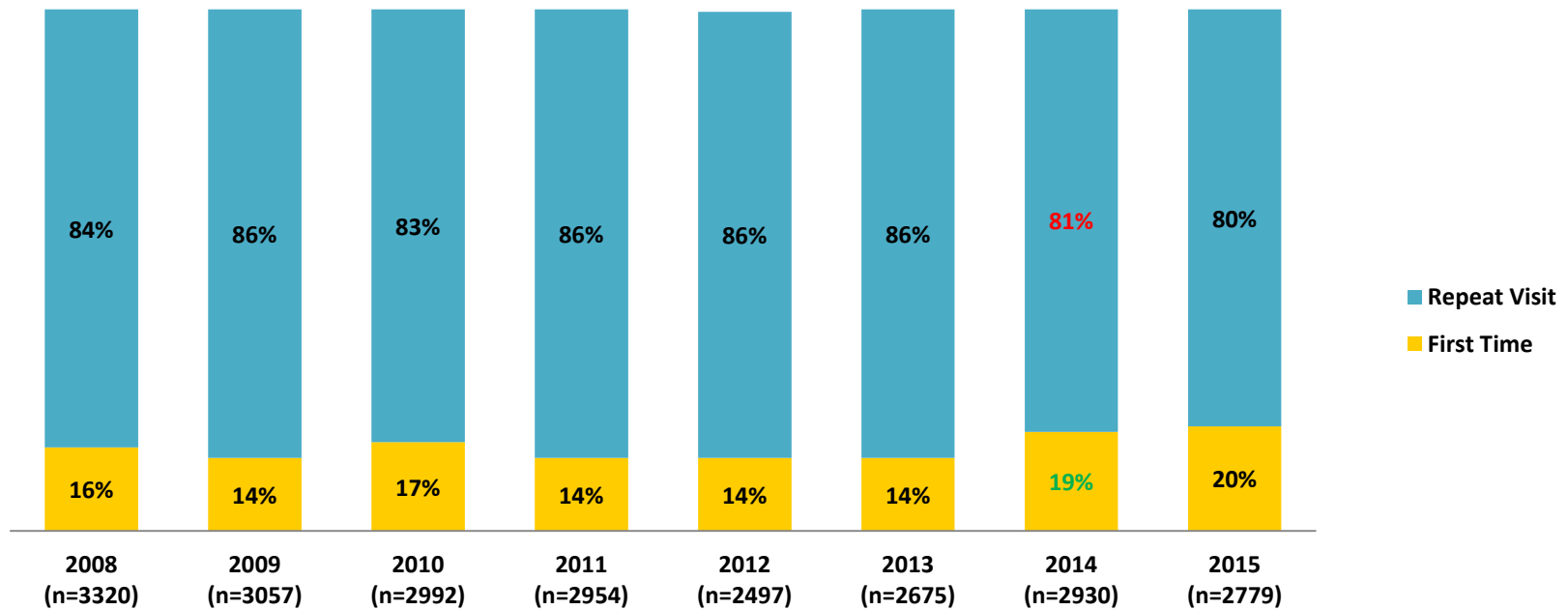
Q11. Was this your first visit in Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# After experiencing relative stability from 2008 to 2013, first-time visitation increased in 2014 and remained at that level in 2015.

### Repeat vs. First Time Visitors Trend



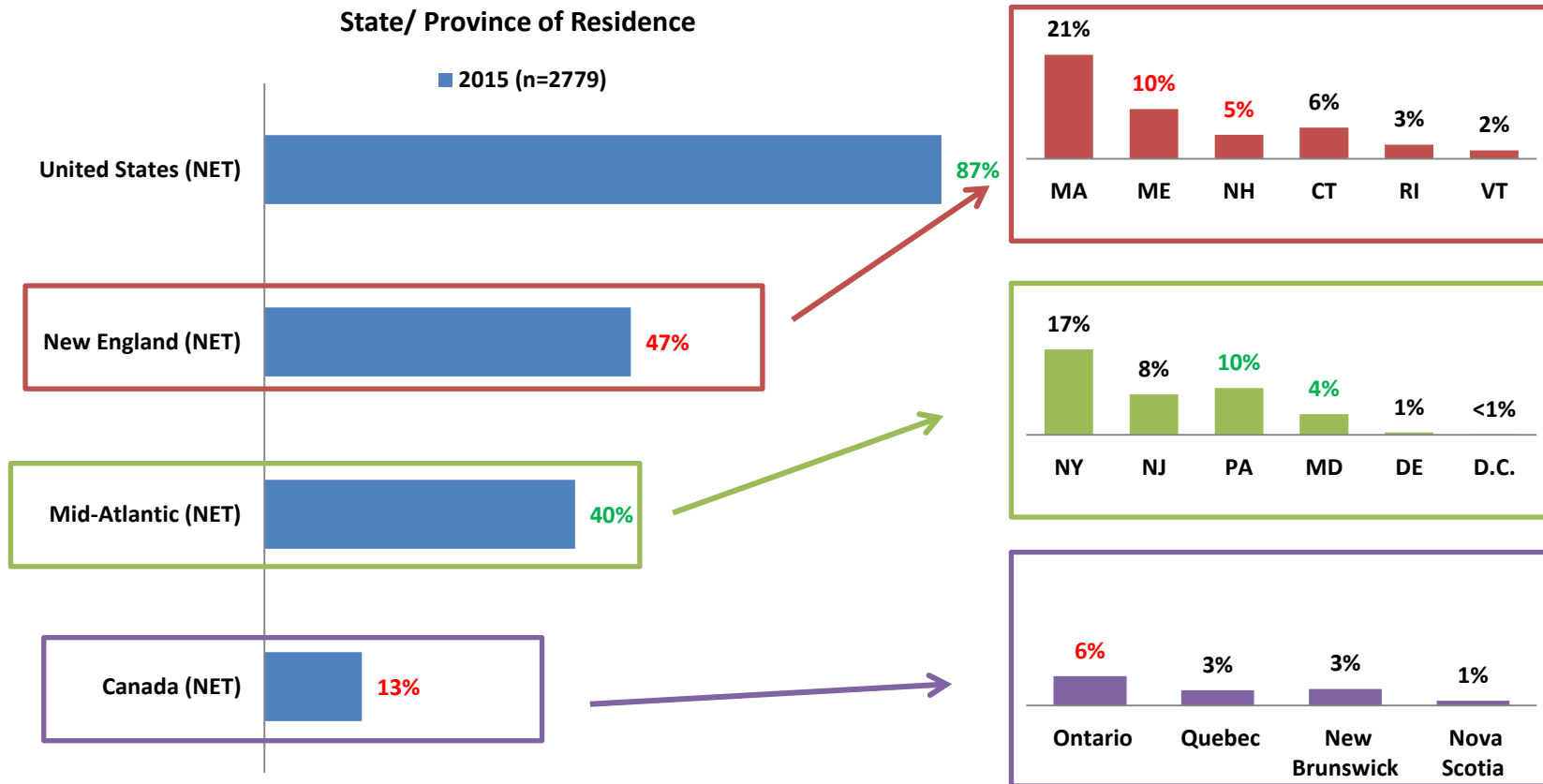
Q11. Was this your first visit in Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The proportion of Canadians visiting Maine dropped for the second year. Growth in domestic visitation was primarily seen from the Mid-Atlantic region.

- Massachusetts and New York continue to source the greatest proportion of overnight visitors to Maine, followed by Maine, Pennsylvania, and New Jersey.



State/ Province of Residence

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# VFR travelers are more likely to come from ME or MA, while business travelers are more likely to arrive from NY.

	NET 2015 (n=2779)	Leisure (n=1249) [a]	VFR (n=1036) [b]	Business (n=494) [c]
<b>United States (NET)</b>	87%	85%	92% ac	85%
<b>New England (NET)</b>	47%	45% c	59% ac	30%
Massachusetts	21%	21% c	26% ac	11%
Maine	10%	8%	13% ac	10%
New Hampshire	5%	4%	6%	4%
Connecticut	6%	7% c	8% c	2%
Rhode Island	3%	3%	3%	3%
Vermont	2%	2% c	2% c	<1%
<b>Mid-Atlantic (NET)</b>	40%	40% b	33%	55% ab
New York	17%	17% b	13%	28% ab
New Jersey	8%	9%	7%	9%
Pennsylvania	10%	10%	8%	12%
Maryland	4%	3%	4%	7% a
Delaware	1%	<1%	1%	<1%
District of Columbia	<1%	<1%	-	-
<b>Canada (NET)</b>	13%	15% b	8%	15% b
Ontario	6%	5%	4%	9% b
Quebec	3%	4%	2%	3%
New Brunswick	3%	5% bc	1%	2%
Nova Scotia	1%	1%	1%	1%
Newfoundland and Labrador	<1%	<1%	<1%	<1%
Prince Edward Island	<1%	<1%	<1%	-

State/ Province of Residence

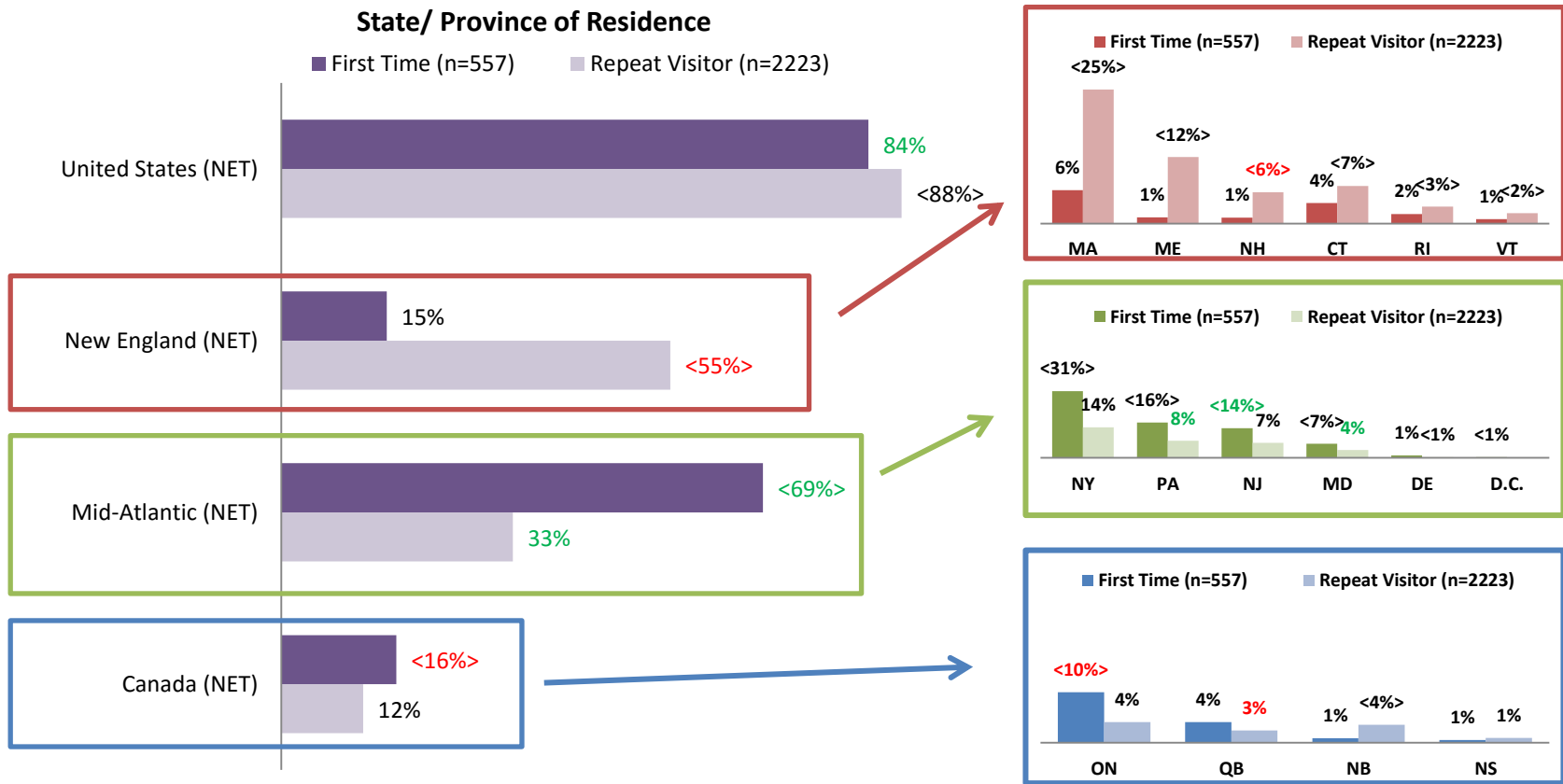
a, b, c indicates significant difference at the 95% confidence level

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



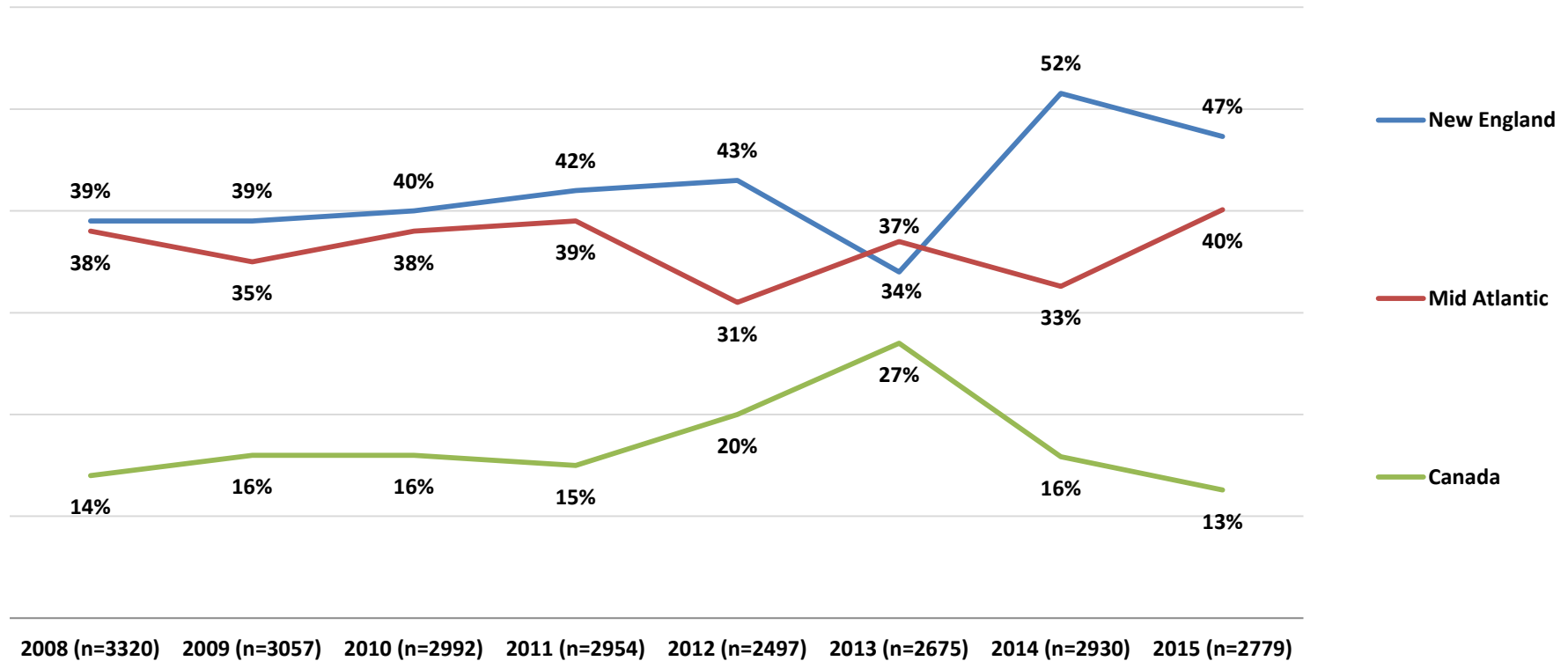
# The Mid-Atlantic region and Canada are more likely to send first-time visitors to Maine.

- While Canadian visitors overall are more likely to be first-time visitors, residents of New Brunswick are more likely to be repeat visitors.



# Following relative stability from 2008 to 2011, geographic sources of Maine overnight visitors fluctuated from 2012 through 2015.

## Maine Overnight Visitor Origin



State/ Province of Residence

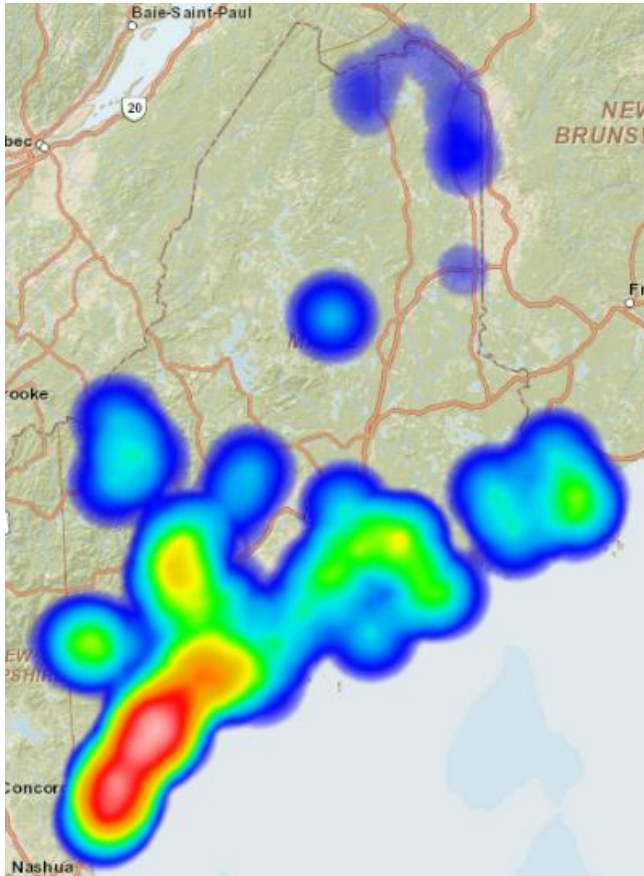
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

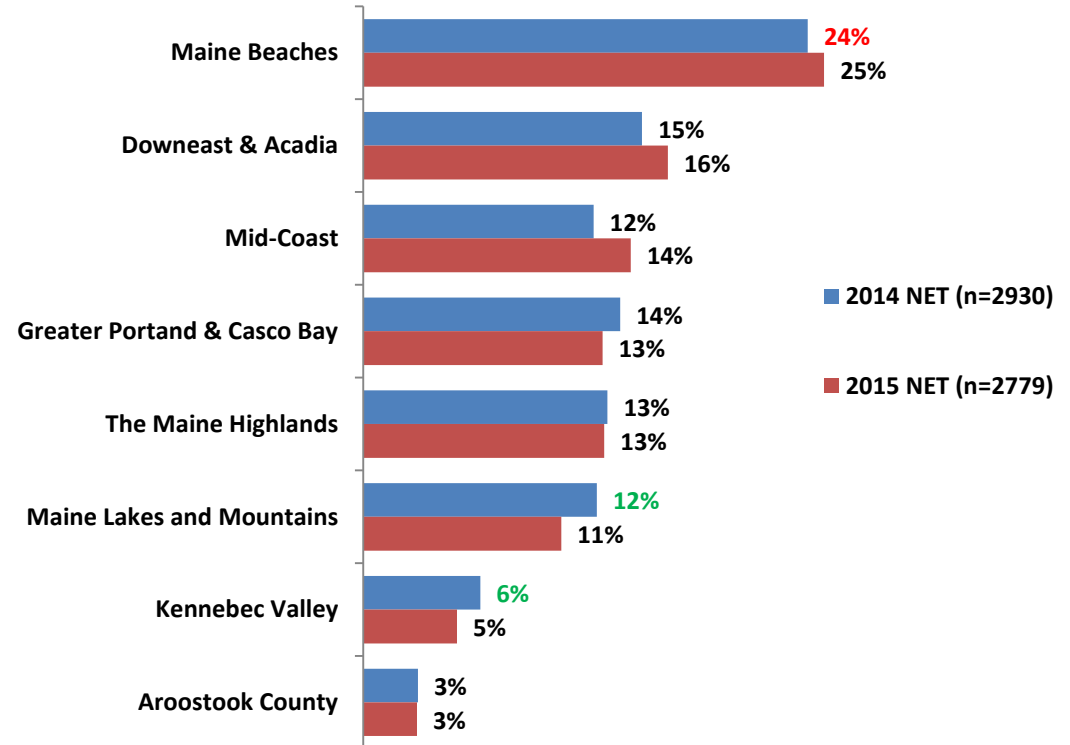
# The Maine Overnight Visitor Experience



# Primary regional visitation patterns remain unchanged, with the Maine Beaches region attracting the highest proportion of overnight visitors.



### Primary Region of Visit

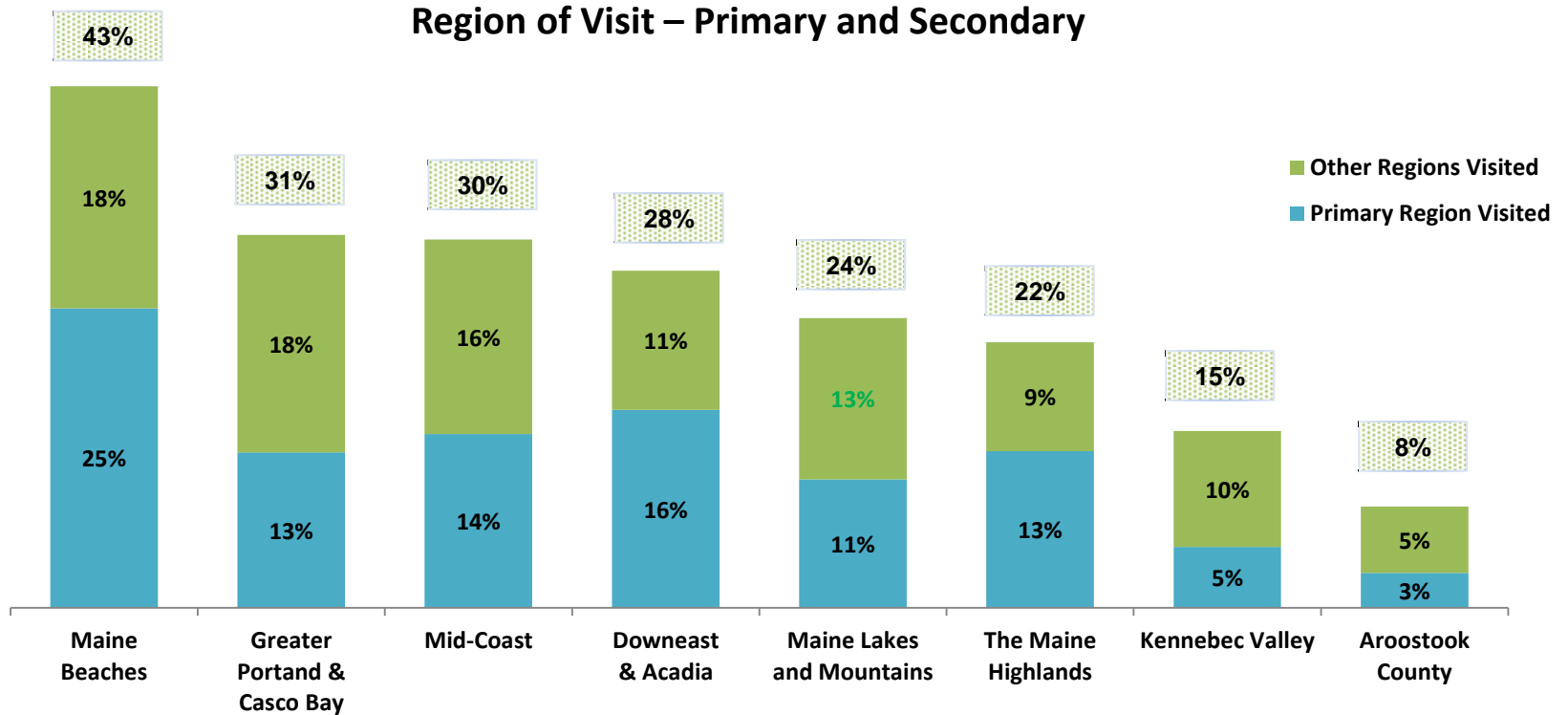


Q22. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overall visitation is also highest for the Maine Beaches region, followed by the Greater Portland/Casco Bay and Mid-Coast regions.



Q22. What region in Maine was your primary destination?

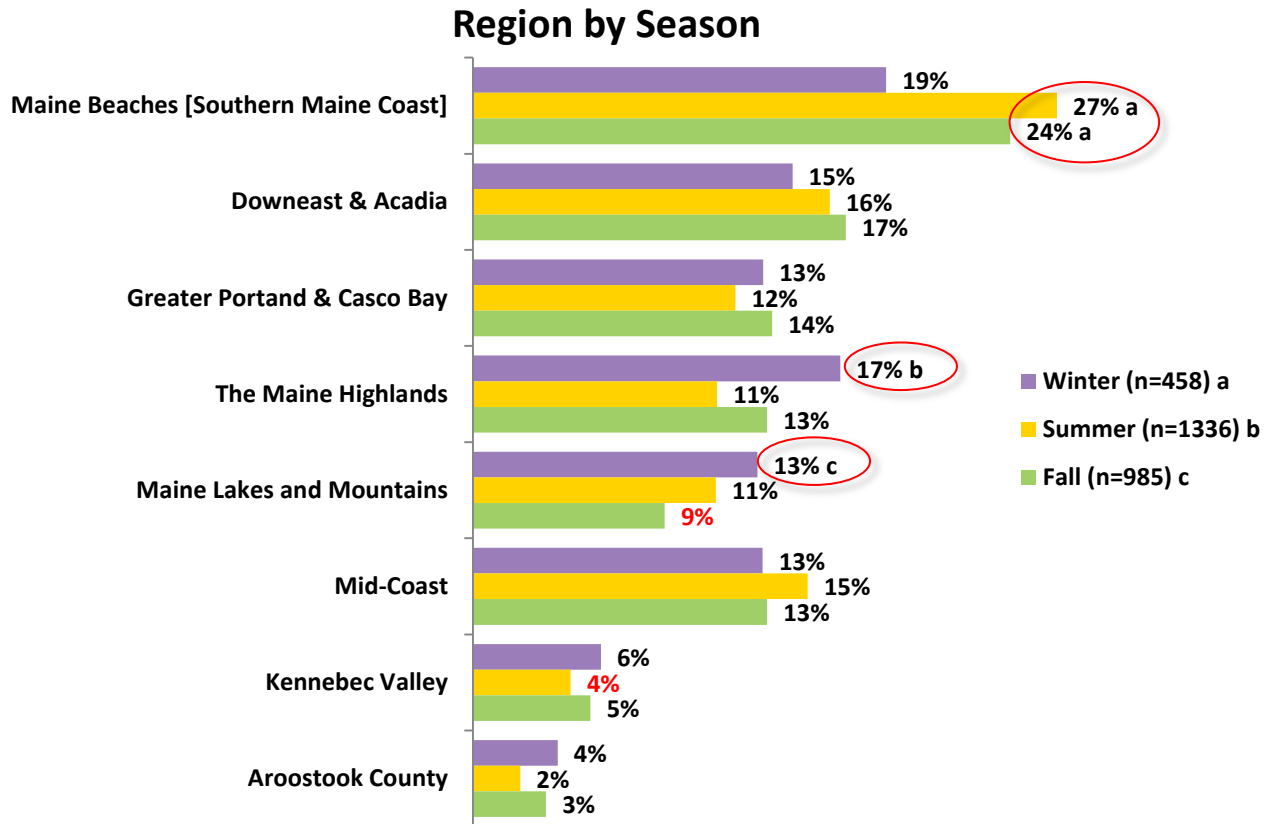
Q24. What other regions, if any, did you visit while you were in Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Primary regional overnight destinations show little seasonal variation with a few exceptions.

- Exceptions include:
  - Summer and Fall visitors are more likely to visit the Maine Beaches region, and
  - Winter travelers are more likely to visit the Maine Highlands and Lakes & Mountains regions.



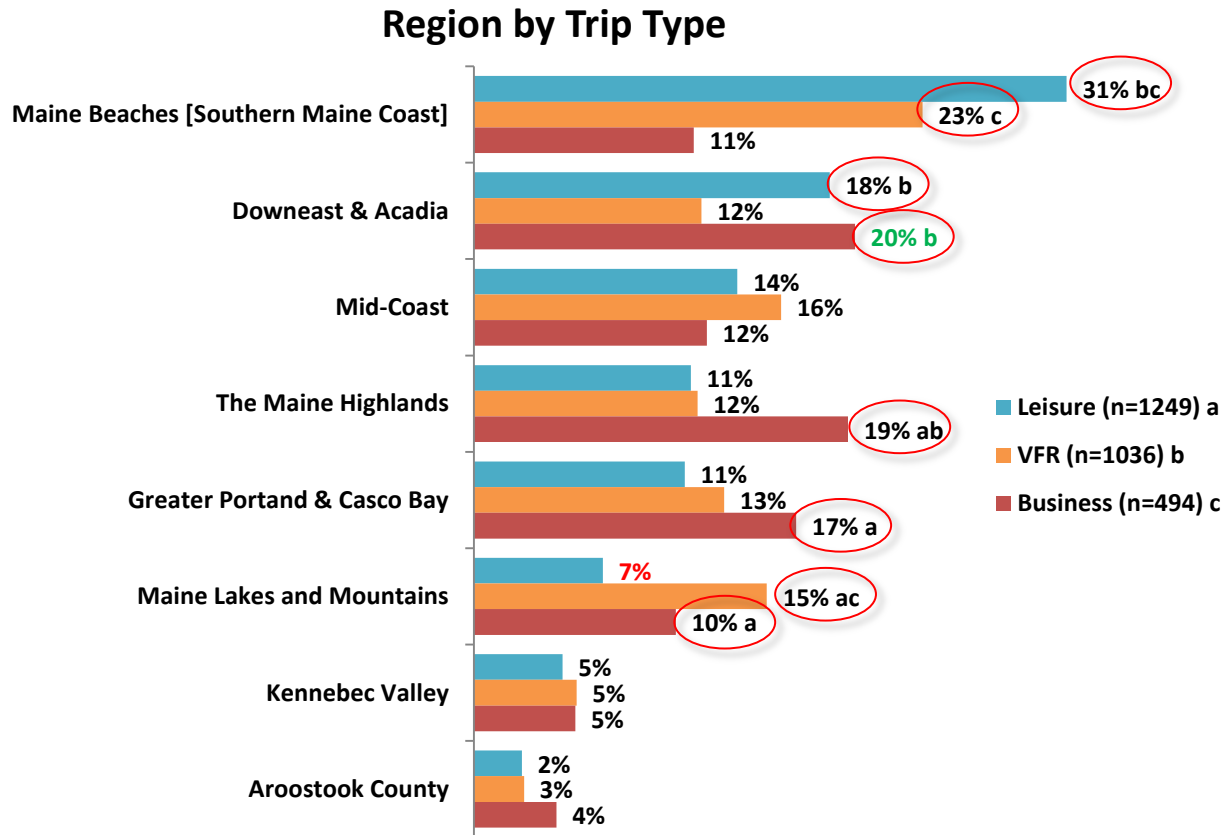
Q22. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The type of trip taken has an impact on the Maine region visited as a primary destination.

- Business travelers are more prevalent than leisure or VFR travelers in the Maine Highlands region, while leisure travelers are more apt to be seen in the Maine Beaches region. VFR travelers are more likely than other types of travelers to visit the Lakes and Mountains region.



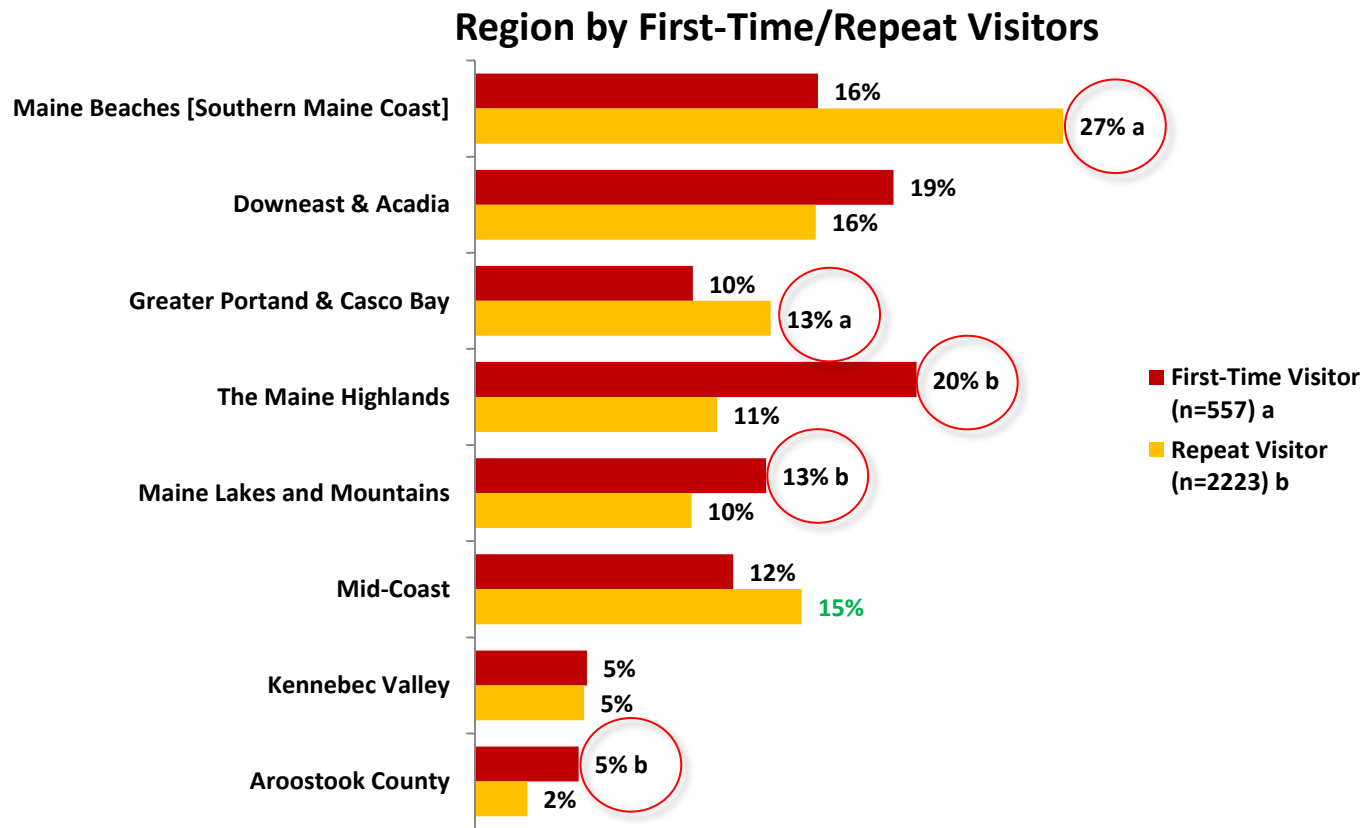
Q22. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Regional destinations differ between first-time and repeat overnight visitors.

- First-time visitors are more likely than repeat visitors to be primarily visiting the Maine Highlands, the Maine Lakes & Mountains region, and Aroostook County.
- Repeat visitors are more likely to be in Maine to visit the Maine Beaches region and the Greater Portland & Casco Bay region.



Q22. What region in Maine was your primary destination?

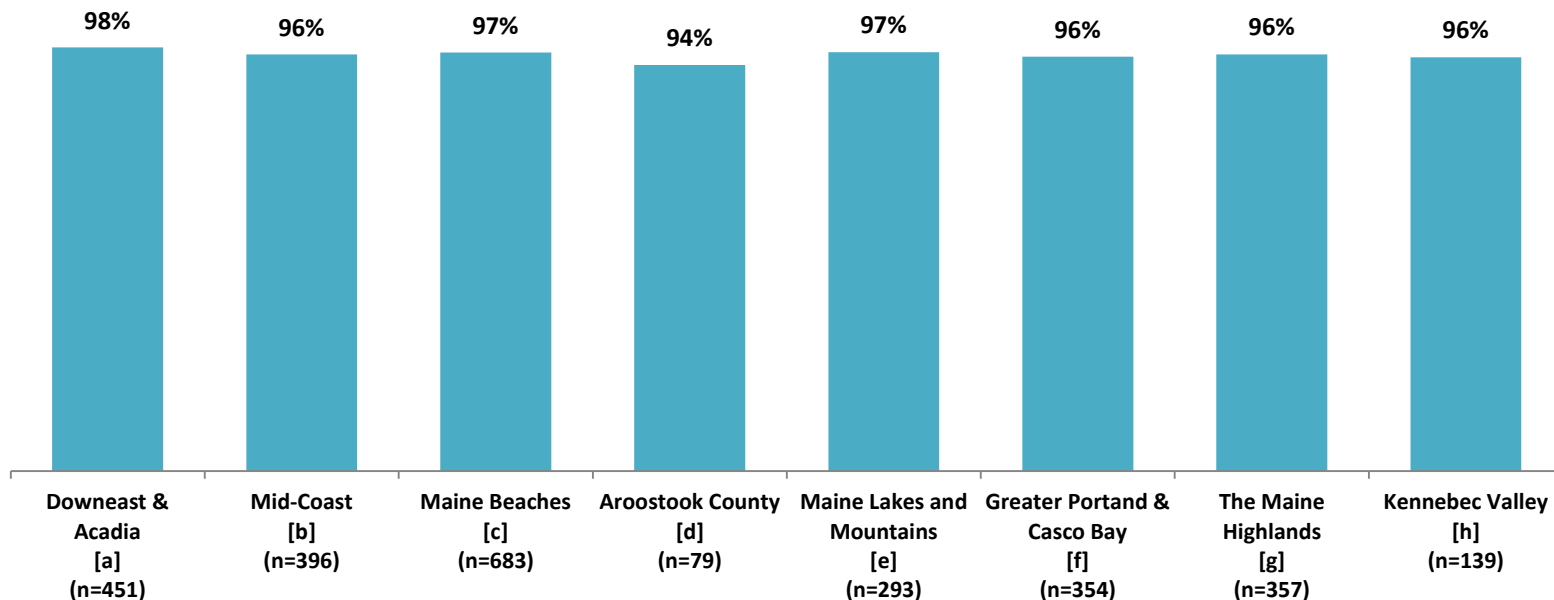
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# Overnight visitors overwhelmingly express the intent to recommend the primary region they visited.

% Definitely/Probably Will Recommend



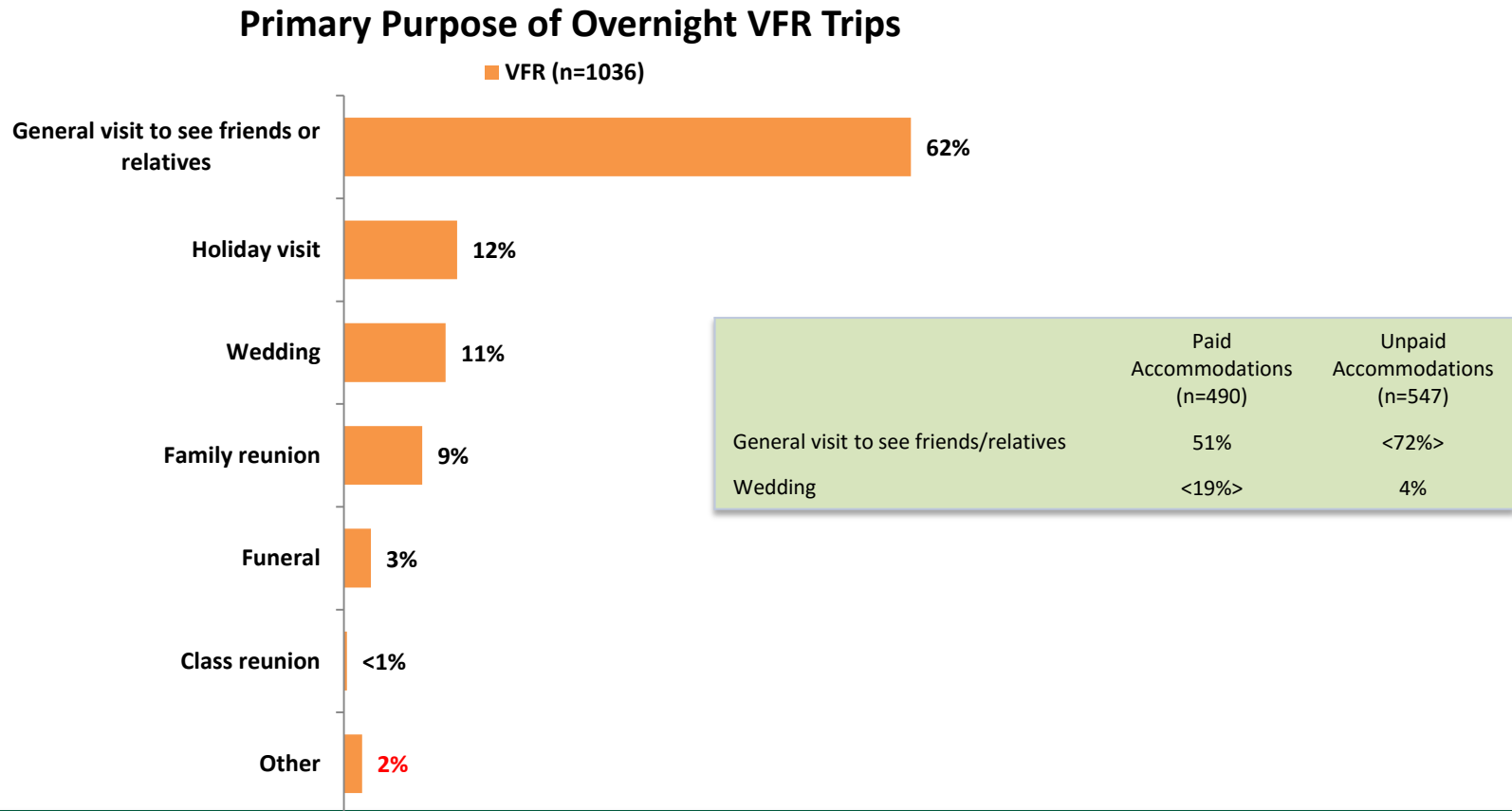
Q23. How likely will you be to recommend the [primary region visited] region to friends or relatives?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight VFR trips to Maine were most frequently a general visit to see friends or relatives.

- While those on a general visit to see friends or relatives are more likely to be staying in unpaid accommodations, those visiting for a wedding are more likely to be staying in paid accommodations.



Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

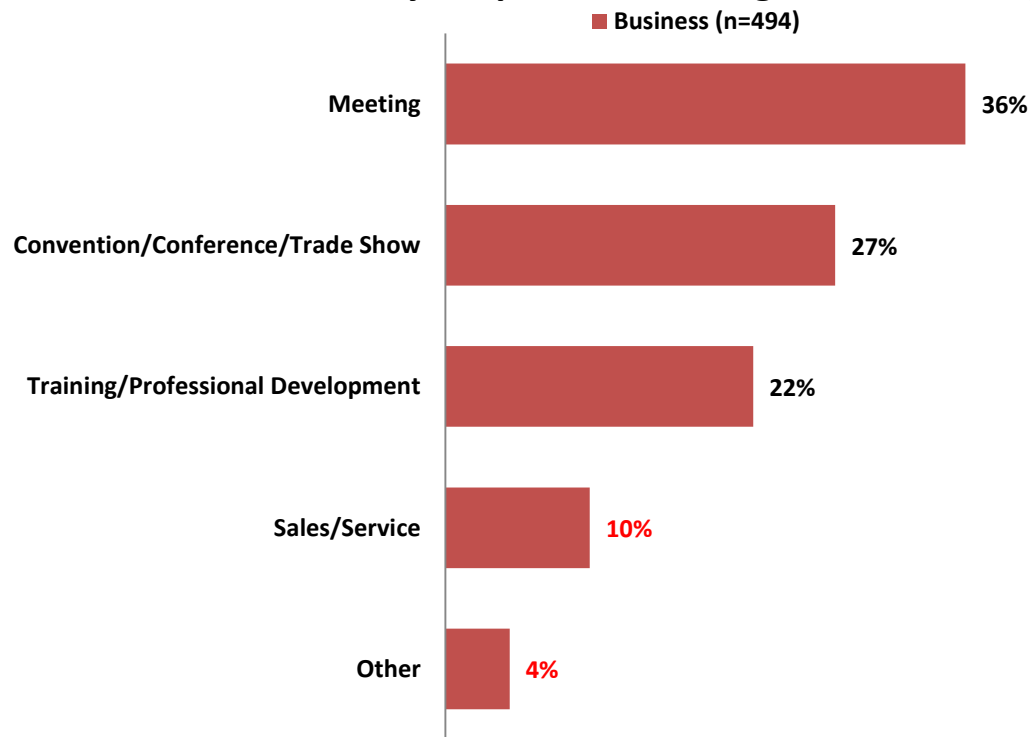
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Business travelers are most likely in Maine for a general meeting.

- Business travelers in Maine for the first time are more likely than repeat visitors to be in Maine for *training/professional development* (32% versus 17% among repeat visitors).
- Younger business travelers are also more likely than older travelers to be visiting Maine for *training/professional development* (29% of those under 35 years of age versus 14% of those 35 and older).

## Primary Purpose of Overnight Business Trips



Q8. What was the primary purpose of your most recent business trip in Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

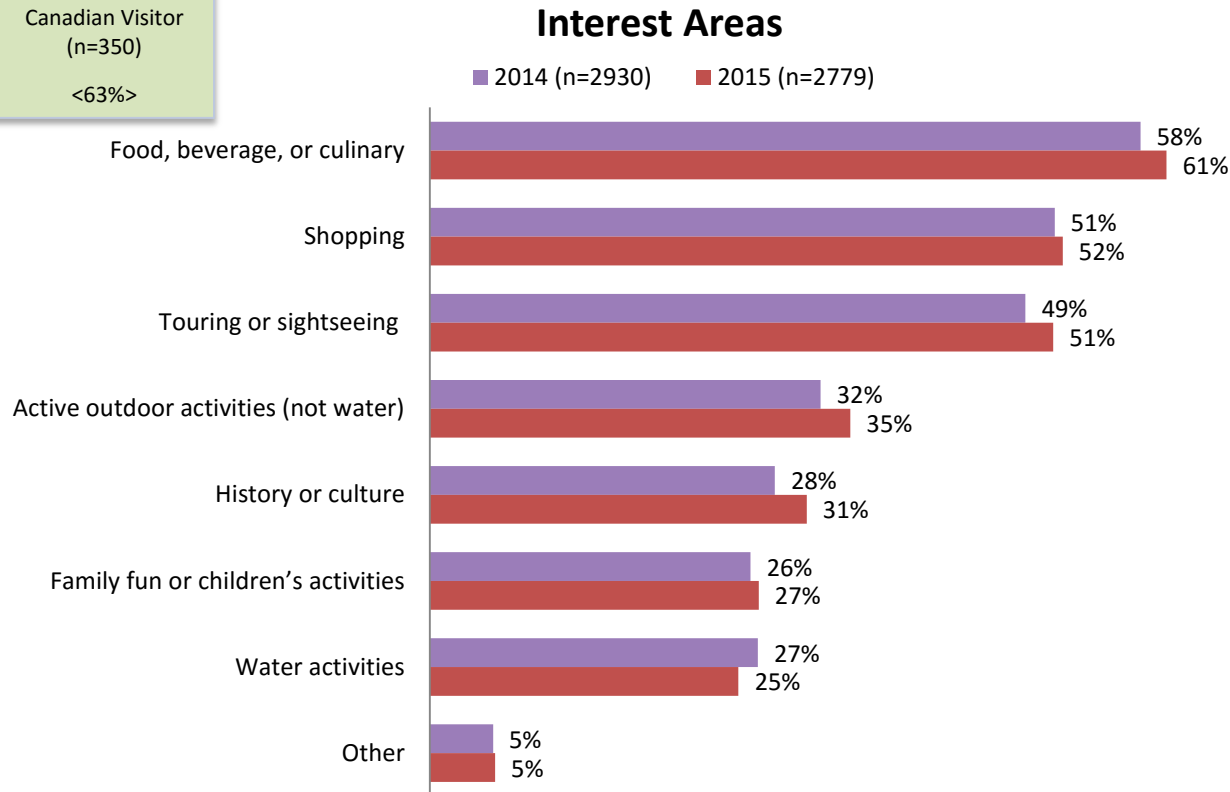
# Food/beverage/culinary activities, shopping, and touring/sightseeing remain the most popular interest areas of overnight visitors.

- Among those who selected *touring/sightseeing* as an interest area, half (51%) ranked it as the most important interest in their decision to visit Maine. A slightly lower proportion of those who selected *family fun or children’s activities* (45%) selected that interest as their most important.

**Shopping Interest**

US Visitor (n=2430)      Canadian Visitor (n=350)

50%      <63%>

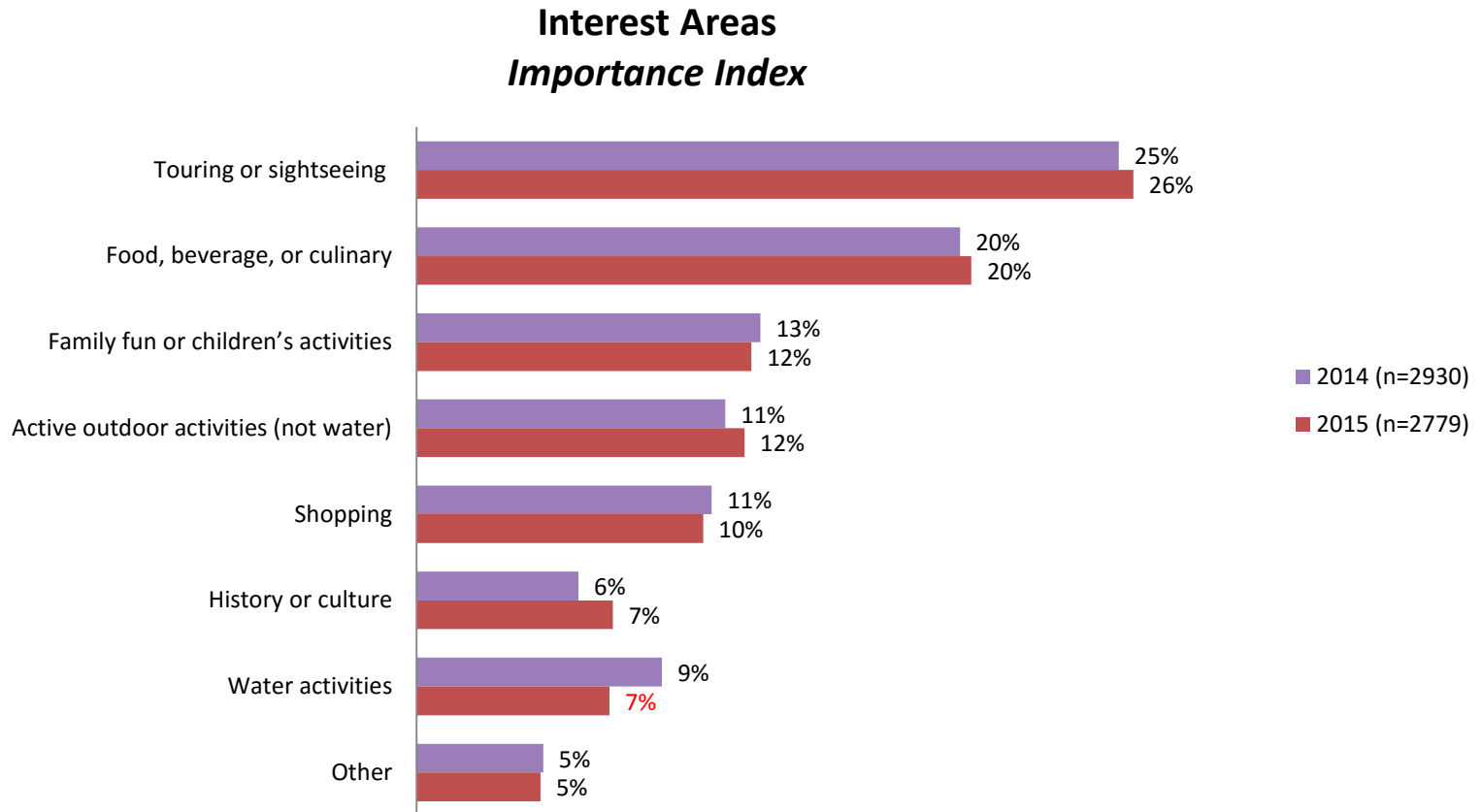


	2014	2015
Food, beverage, or culinary	34%	33%
Shopping	21%	20%
Touring or sightseeing	52%	51%
Active outdoor activities (not water)	35%	34%
History or culture	21%	23%
Family fun or children’s activities	48%	45%
Water activities	33%	28%
Other	92%	90%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 52  
 <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Touring/sightseeing and food/beverage/culinary activities rank highest when analyzing both interest and importance in deciding to visit.



**\*Importance Index = percentage selecting category as interest area X percentage listing same interest area as #1 most important**

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Interest areas differ by season, first-time/repeat visitor status, and presence of children in their travel party.

- First-time visitors and those traveling with children are more likely to be interested in all but two interest areas, as shown in the table below. Repeat visitors are more likely to be interested in *shopping* while in the State.
- Not surprisingly, *water activities* are more likely to be an interest during the Summer months, while *touring/sightseeing* are more likely to be an interest during the Fall.

Interest Area	NET 2015 (n=2779)	Kids on Trip		First-Time/Repeat		Season		
		Kids (n=858) a	No Kids (n=1922) b	First-Time (n=557) c	Repeat (n=2223) d	Winter (n=458) e	Summer (n=1336) f	Fall (n=985) g
Food, beverage, or culinary	61%	58%	62%	58%	61%	57%	62% e	61%
Shopping	52%	55%	51%	46%	54% c	55%	52%	51%
Touring or sightseeing	51%	56% b	49%	61% d	49%	47%	49%	56% ef
Active outdoor activities (not water)	35%	45% b	30%	42% d	33%	34%	36%	33%
History or culture	31%	39% b	27%	43% d	28%	32%	30%	31%
Family fun or children's activities	27%	62% b	11%	33% d	25%	25%	28%	27%
Water activities	25%	39% b	19%	31% d	24%	19%	32% eg	20%
Other	5%	2%	7% a	1%	7% c	4%	5%	6%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*  
 <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

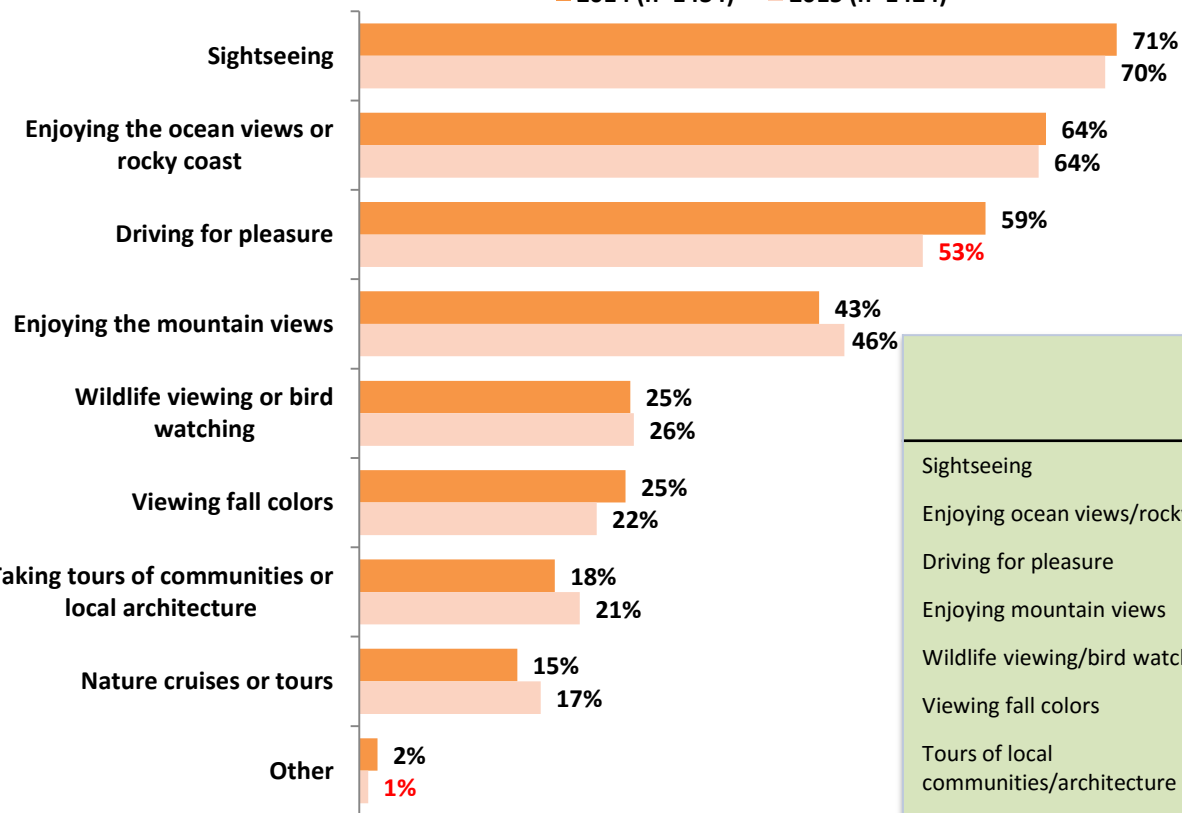
# Visitors listing touring/sightseeing as an interest area are most likely to engage in *general sightseeing* activities while visiting Maine.

- Following as a close second are mentions of *enjoying ocean views/rocky coast*. *Driving for pleasure* is mentioned less often in 2015 than it was in 2014.

## Touring or Sightseeing Activities

Base: Those who report touring or sightseeing as an interest area for this Maine trip

2014 (n=1434) 2015 (n=1424)



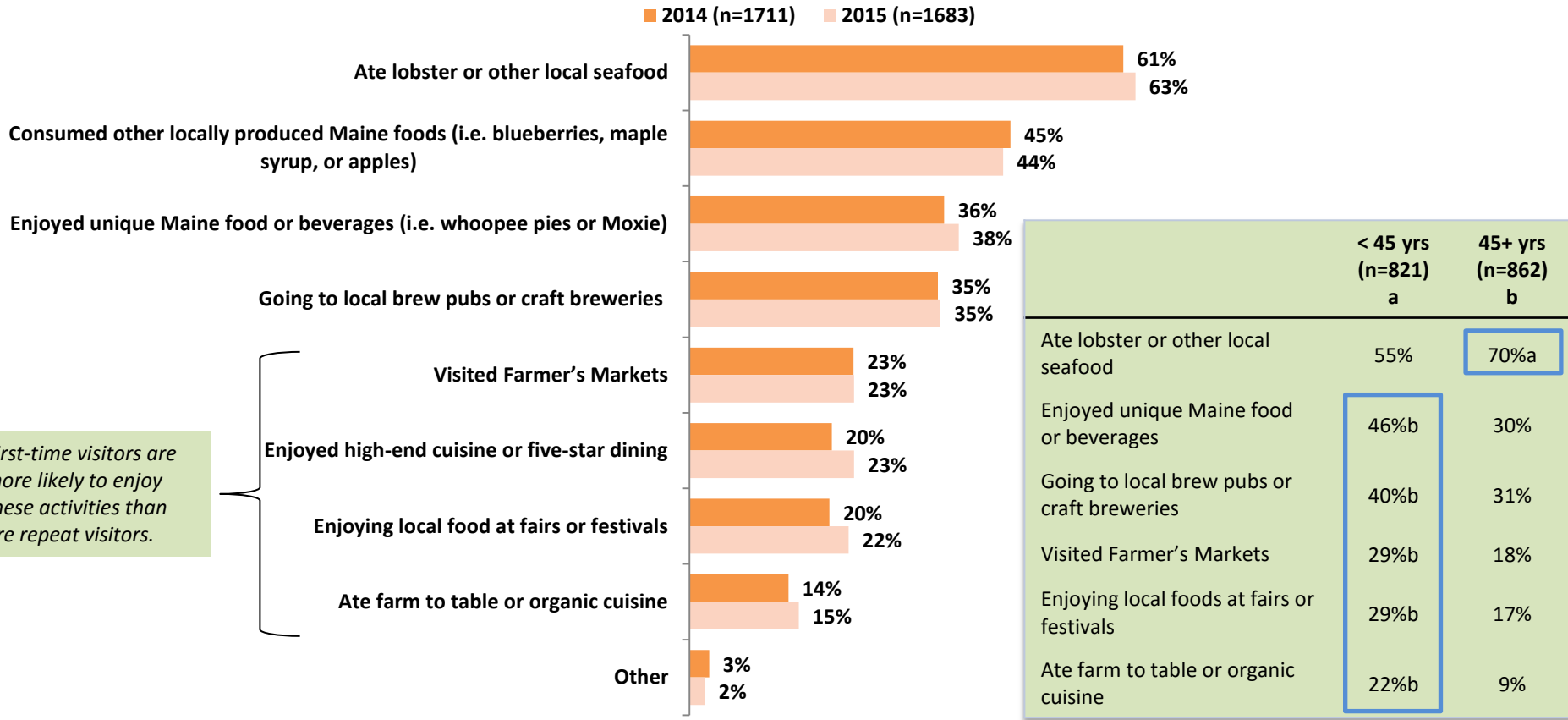
	First-Time (n=340) a	Repeat (n=1084) b	Kids (n=477) c	No Kids (n=947) d
Sightseeing	74%	69%	74% d	68%
Enjoying ocean views/rocky coast	57%	66% a	65%	63%
Driving for pleasure	42%	56% a	50%	54%
Enjoying mountain views	54% b	43%	56% d	40%
Wildlife viewing/bird watching	30%	24%	34% d	22%
Viewing fall colors	25%	21%	24%	22%
Tours of local communities/architecture	27% b	19%	27% d	17%
Nature cruises or tours	24% b	15%	26% d	13%

Q31. In which of the following activities did you participate during this trip? *Please check all that apply.* <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Eating lobster or local seafood is the most popular activity among visitors interested in food/beverage/culinary activities.

- Eating lobster or other local seafood is more popular among domestic visitors than it is among Canadian visitors (65% versus 43%).

**Food, Beverage, or Culinary Activities**  
 Base: Those who report food/beverage/culinary as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? Please check all that apply. <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

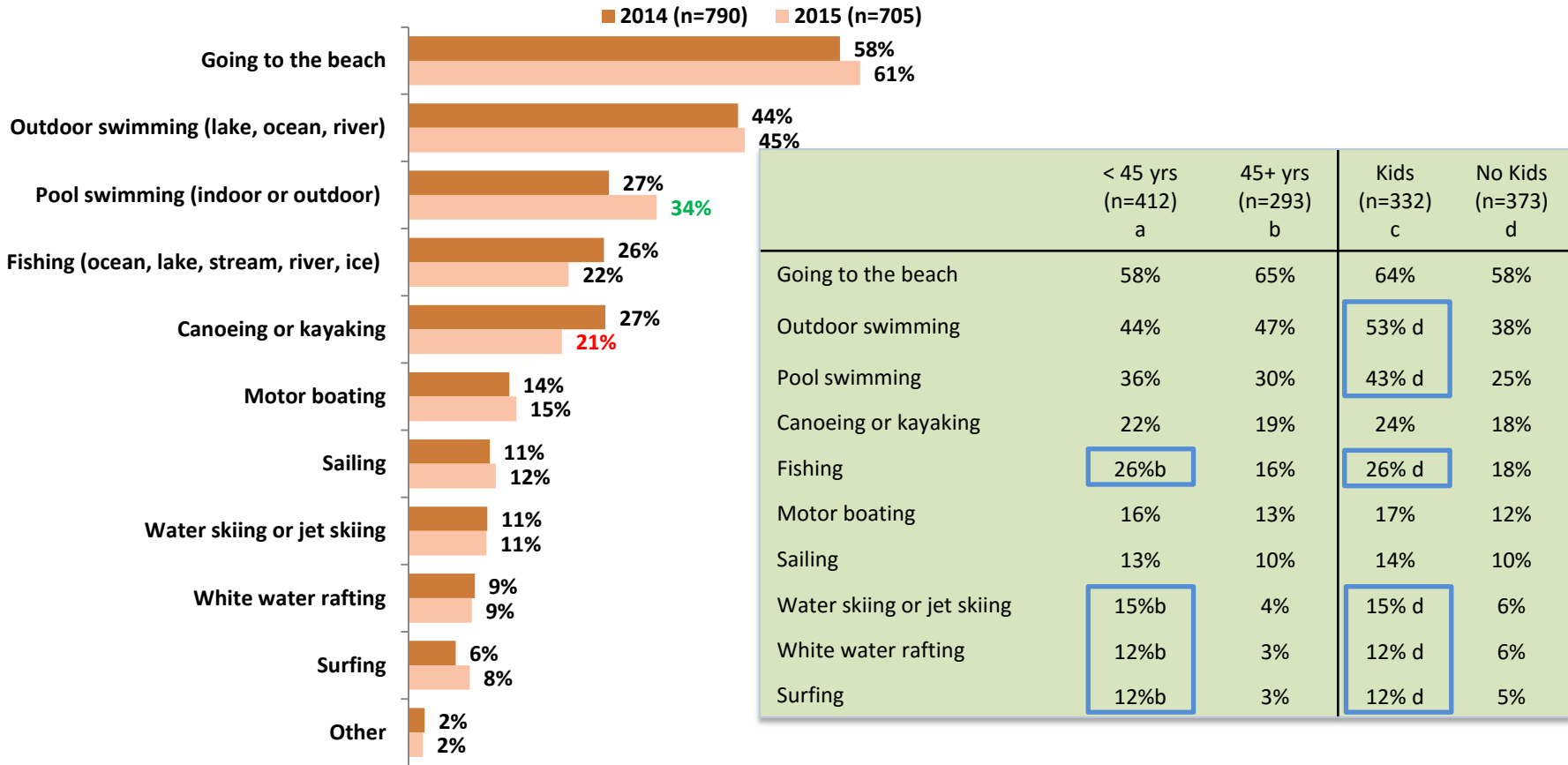


# Going to the beach was the most frequently cited water activity among visitors selecting this interest area.

- Visitors under the age of 45 and those traveling with children are more likely to engage in an array of water activities such as *water skiing/jet skiing, white water rafting, and surfing*.

## Water Activities

Base: Those who report water activities as an interest area for this Maine trip

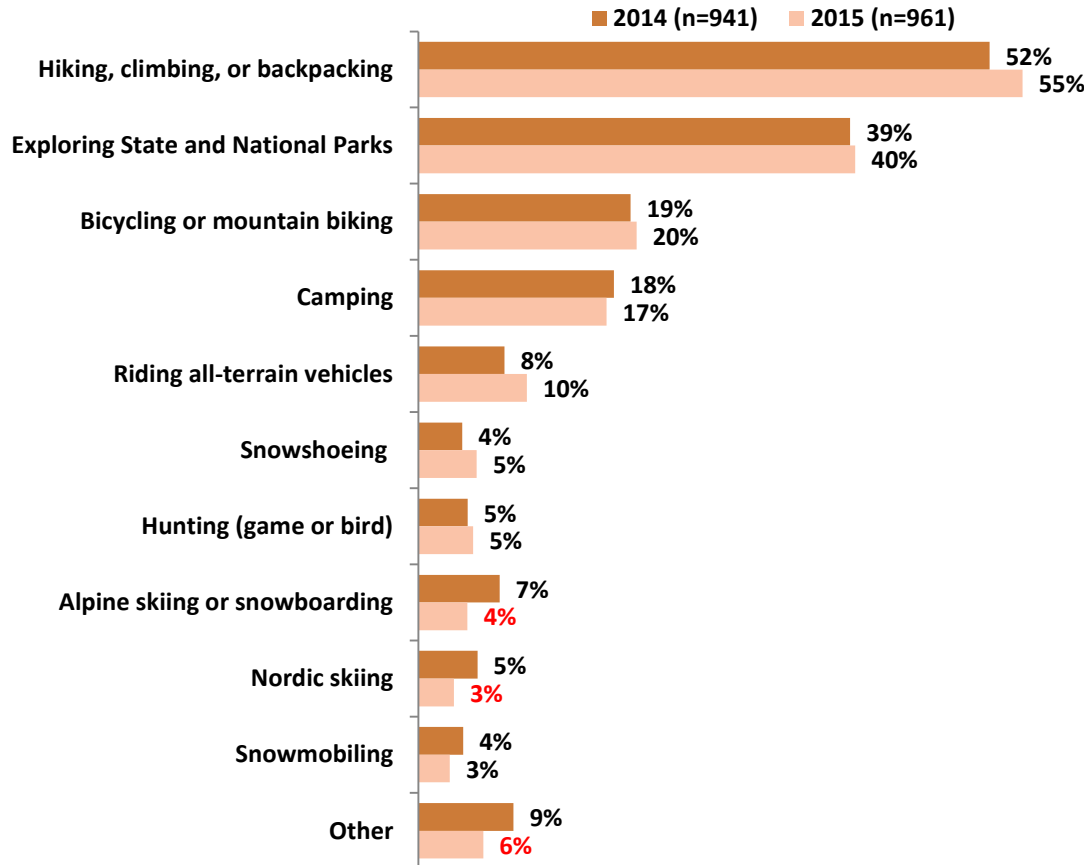


Q31. In which of the following activities did you participate during this trip? Please check all that apply. <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Hiking/climbing/backpacking and exploring State/National Parks are the top activities for visitors interested in outdoor recreation.

## Active Outdoor Activities – Non-Water

Base: Those who report active non-water outdoor activities as an interest area for this Maine trip



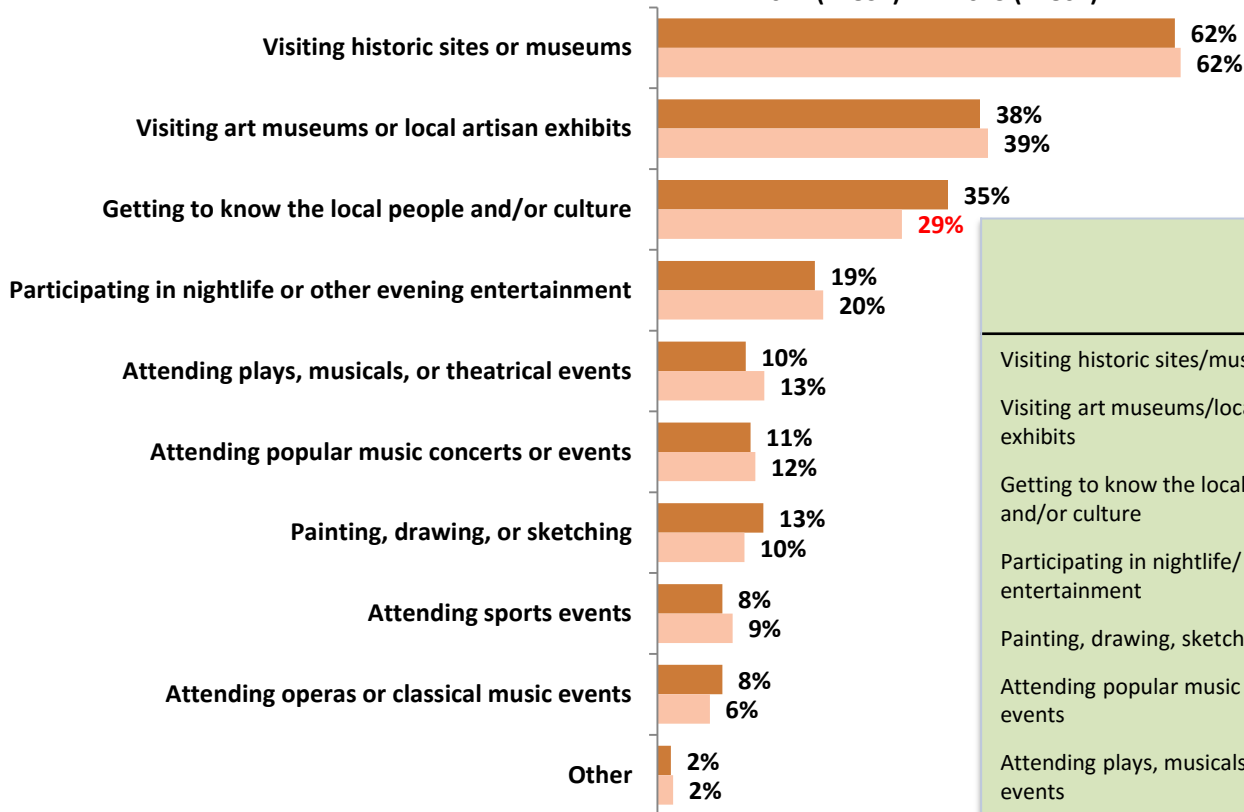
Q31. In which of the following activities did you participate during this trip? Please check all that apply.  
 <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Visiting historic sites/museums is the most prevalent activity among overnight visitors interested in history or culture.

## History or Culture Activities

Base: Those who report history or culture as an interest area for this Maine trip

2014 (n=831) 2015 (n=861)



	< 45 yrs (n=518) a	45+ yrs (n=343) b	Kids (n=332) c	No Kids (n=373) d
Visiting historic sites/museums	58%	69%a	59%	64%
Visiting art museums/local artisan exhibits	35%	46%a	40%	39%
Getting to know the local people and/or culture	27%	33%	32%	27%
Participating in nightlife/ evening entertainment	23%b	15%	21%	19%
Painting, drawing, sketching	14%b	5%	15%b	8%
Attending popular music concerts or events	14%b	8%	13%	11%
Attending plays, musicals, or theatrical events	17%b	6%	17%b	10%
Attending operas or classical music events	8%b	3%	9%b	4%
Attending sports events	13%b	3%	15%b	5%

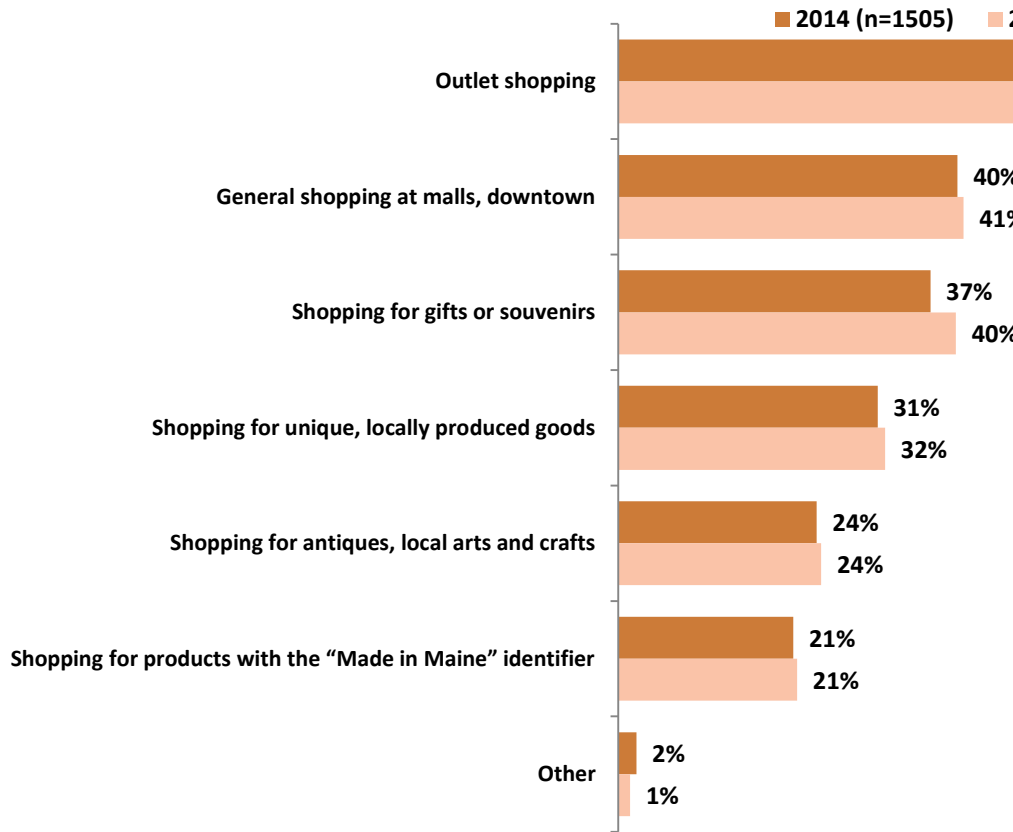
Q31. In which of the following activities did you participate during this trip? Please check all that apply.  
 <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Half of overnight visitors who are interested in shopping engage in *outlet shopping* while in Maine.

- While Canadian visitors are more likely than out-of-state domestic visitors to do some *general shopping at malls or downtown*, domestic visitors are more likely to mention shopping for *antiques and local arts/crafts*.
- Outlet shopping* is most popular among out-of-state New England residents, while *gift or souvenir* shopping is most popular among domestic visitors outside of New England.

## Shopping Activities

Base: Those who report shopping as an interest area for this Maine trip



	Maine (n=112) a	New England (n=554) b	Other US (n=558) c	Canada (n=221) d
Outlet shopping	31%	63%acd	47%	54%a
General shopping at malls, downtown	56%bc	35%	38%	57%bc
Shopping for gifts or souvenirs	30%	36%	49%abd	35%
Shopping for unique, locally produced goods	26%	31%d	37%d	22%
Shopping for antiques, local arts and crafts	26%d	25%d	28%d	13%
Shopping for products with "Made in Maine" identifier	26%	16%	28%bd	17%

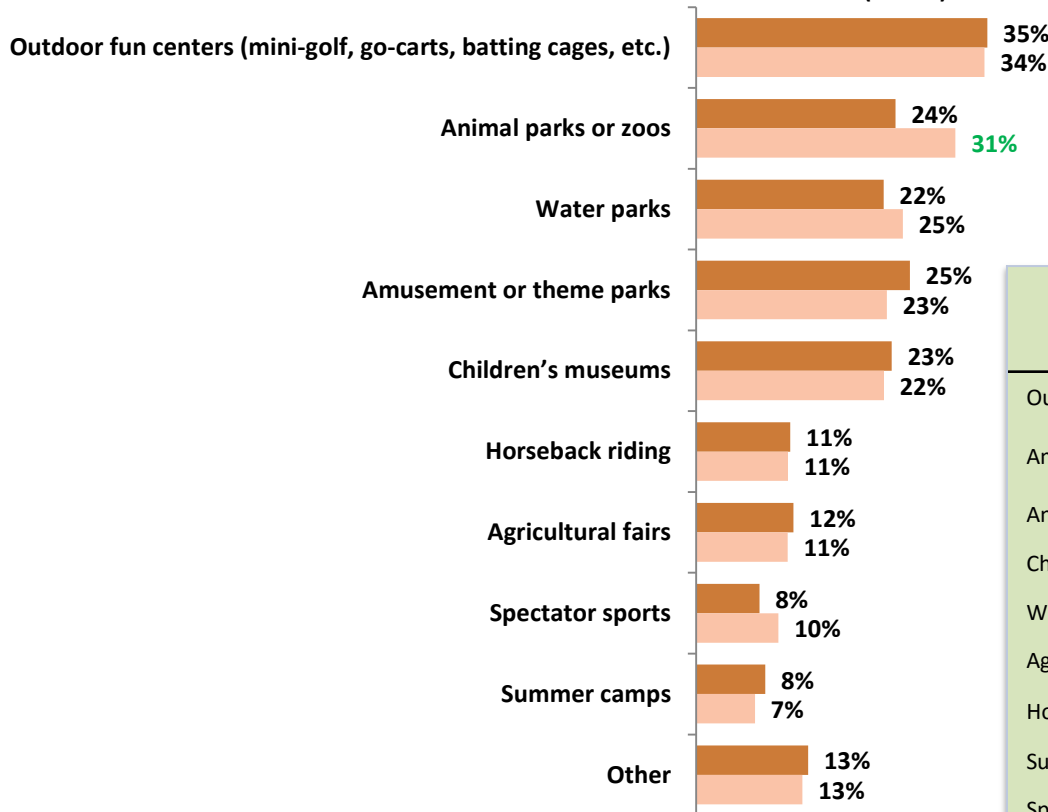
Q31. In which of the following activities did you participate during this trip? Please check all that apply.  
 <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Outdoor fun centers and animal parks/zoos are the most popular activities for visitors interested in family fun/children’s activities.

## Family Fun/Children’s Activities

Base: Those who report family fun/children’s activities as an interest area for this Maine trip

2014 (n=772) 2015 (n=751)



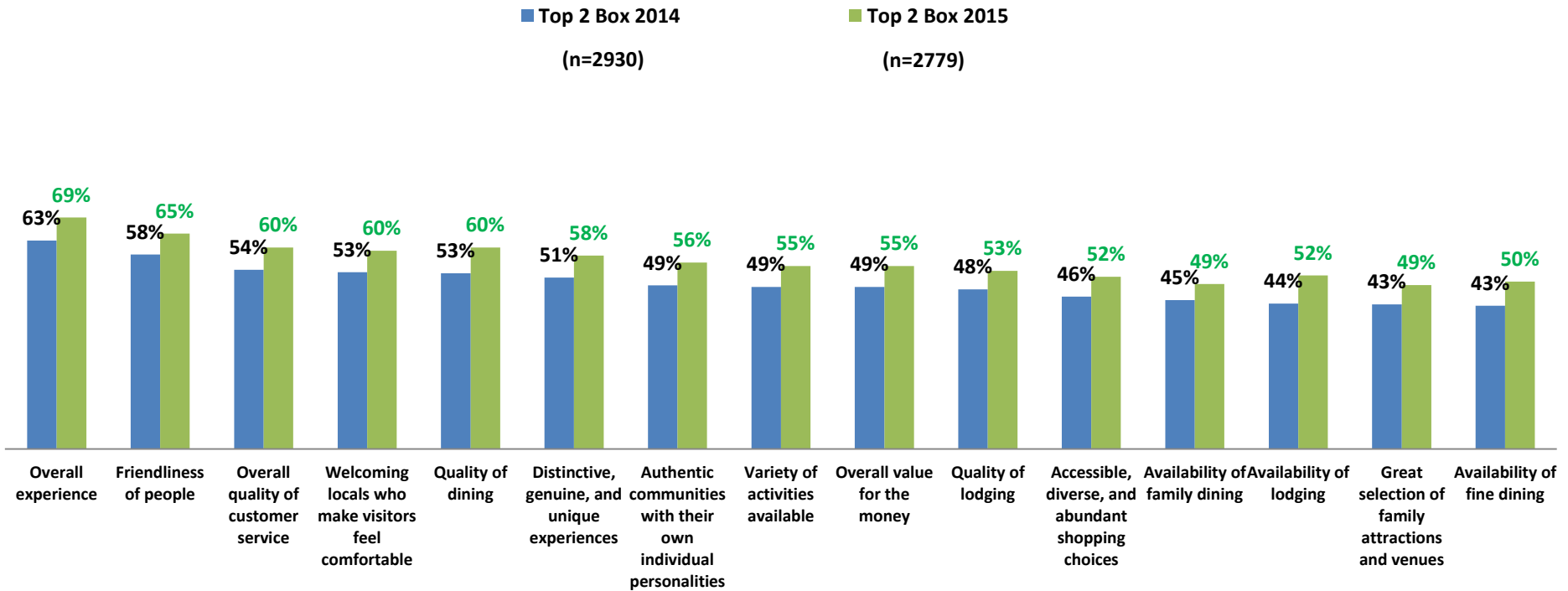
	First-Time (n=186) a	Repeat (n=566) b	Kids (n=534) c	No Kids (n=217) d
Outdoor fun centers	34%	34%	39% d	24%
Amusement or theme parks	20%	23%	26% d	15%
Animal parks or zoos	35%	30%	34% d	23%
Children’s museums	32% b	19%	29% d	7%
Water parks	28%	24%	29% d	15%
Agricultural fairs	16% b	9%	10%	13%
Horseback riding	17% b	9%	11%	10%
Summer camps	11%	6%	7%	8%
Spectator sports	14%	9%	8%	13%

Q31. In which of the following activities did you participate during this trip? Please check all that apply. <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Maine rises well above visitor expectations for overall experience and friendliness of its people.

- At least half of overnight visitors report that Maine either *far exceeded their expectations* or was *somewhat above their expectations* in all categories.

## Maine Far Exceeded/Somewhat Above My Expectations

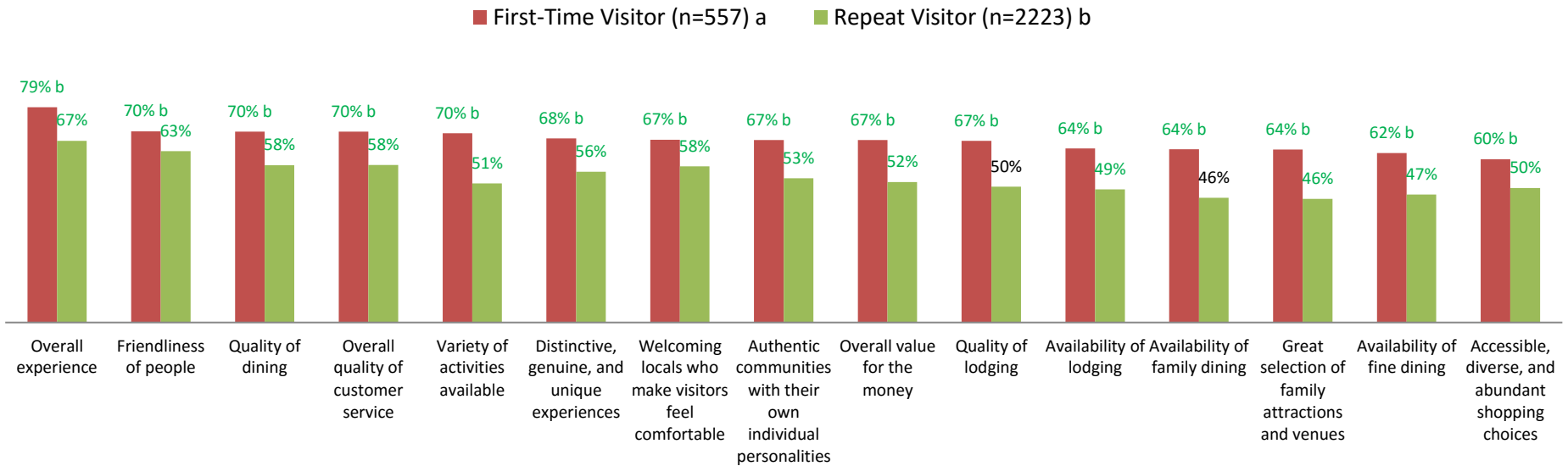


Q35. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

# Maine is more likely to exceed expectations on all attributes among first-time visitors than among repeat visitors.

- Several other sub-groups are more likely to report Maine exceeds their expectations on most attributes:
  - Visitors staying in paid accommodations;
  - US visitors;
  - Visitors traveling with children; and
  - Visitors under the age of 45.

## Maine Far Exceeded/Somewhat Above My Expectations (Top 2 Box)



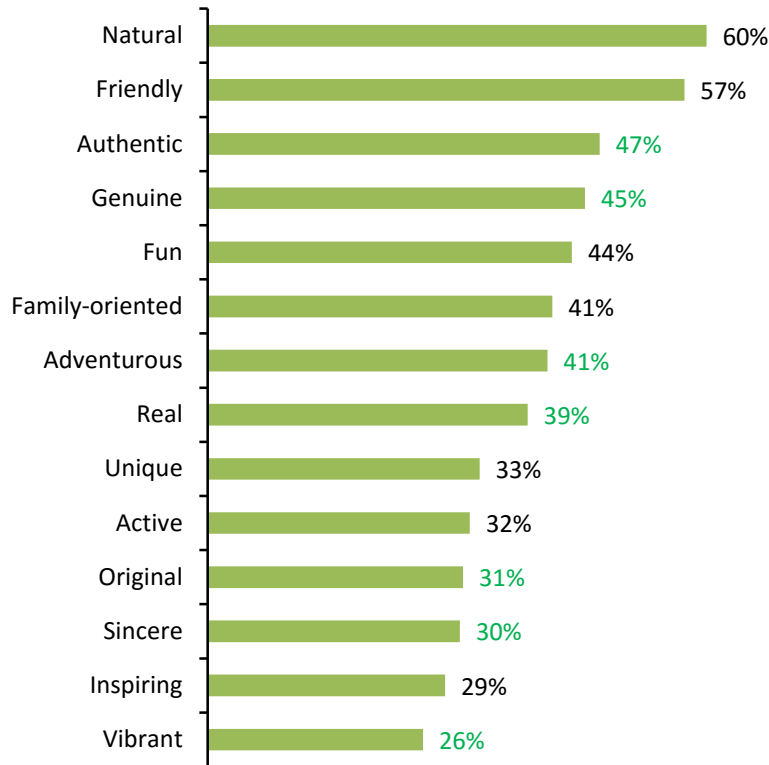
Q35. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

# “Natural” and “Friendly” are among the top words chosen to describe Maine’s personality.

- More than half of overnight visitors selected “natural” or “friendly” as words to describe Maine’s personality, if Maine were a person. Words selected by 1% or fewer included *stodgy, boring, fake, unpleasant, and uninspiring.*

**Words Describing Maine’s Personality**  
(n=2779)



Less Frequently Mentioned	
Old-fashioned	23%
Creative	20%
Open-minded	20%
Enthusiastic	19%
Passionate	17%
Imaginative	17%
Dynamic	14%
Quirky	12%
Unexpected	9%
Offbeat	8%
Reserved	7%
Unusual	6%
Unconventional	5%
Stodgy	1%
Boring	1%
Fake	1%
Unpleasant	1%
Uninspiring	<1%
Other	2%

Q41. If Maine were a person, which of the following words would you choose to describe its personality?



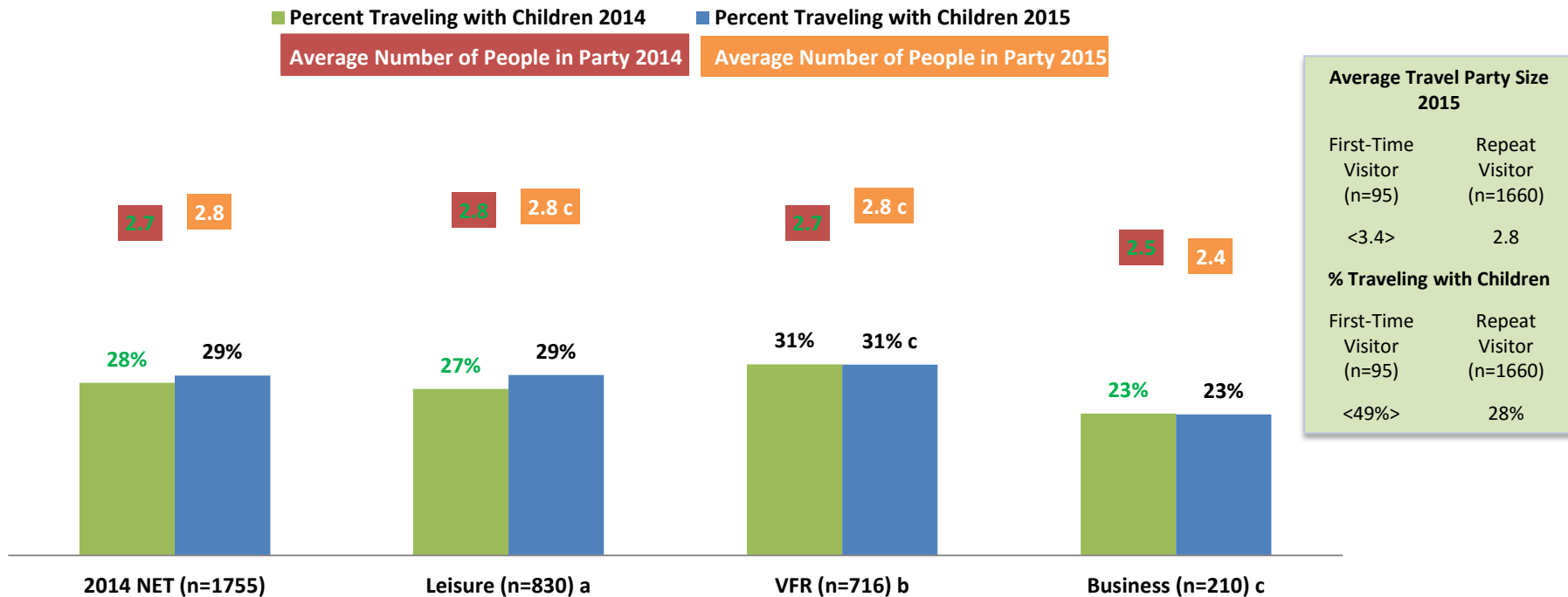
# Day Visitor Travel Logistics



# Day visitors travel to Maine in groups of two to three, and one-fourth bring children.

- As seen in the charts below, first-time day visitors travel in larger groups than repeat visitors, and are also more likely to be traveling with children.

## Travel Party Size and Composition



Q14. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

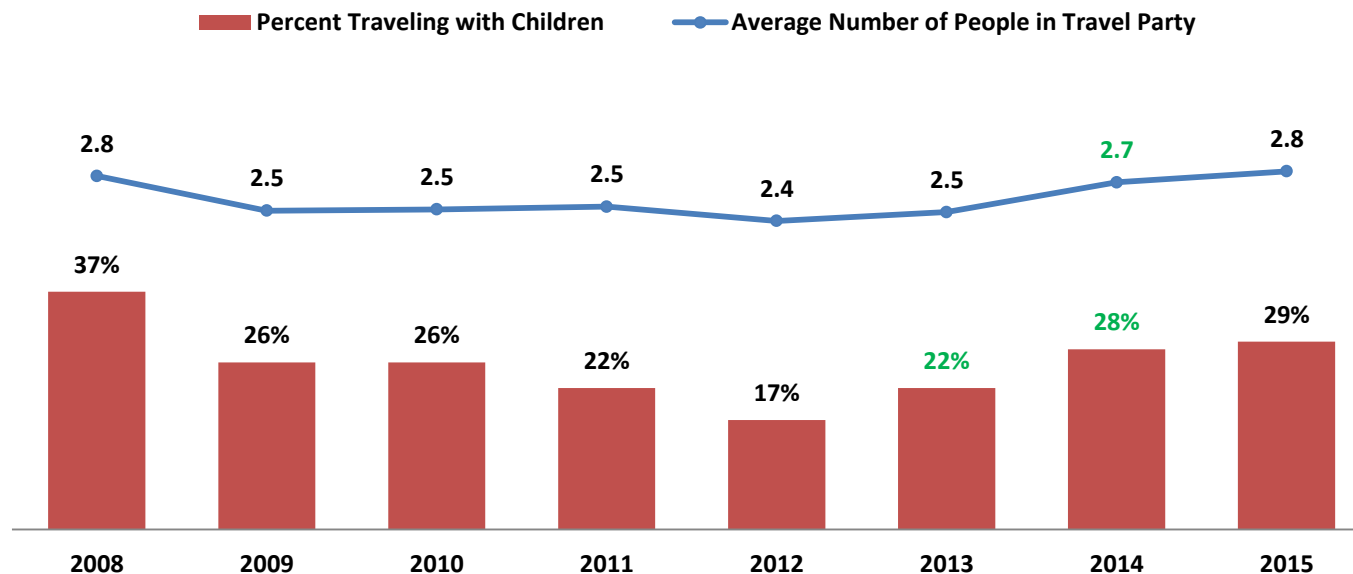
Q15. How many of these people were: Children?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

After two years of increases in the proportion of day visitors traveling with children, the 2015 proportion is consistent with the prior year.

## Travel Party Size and Composition



Q14. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q15. How many of these people were: Children?

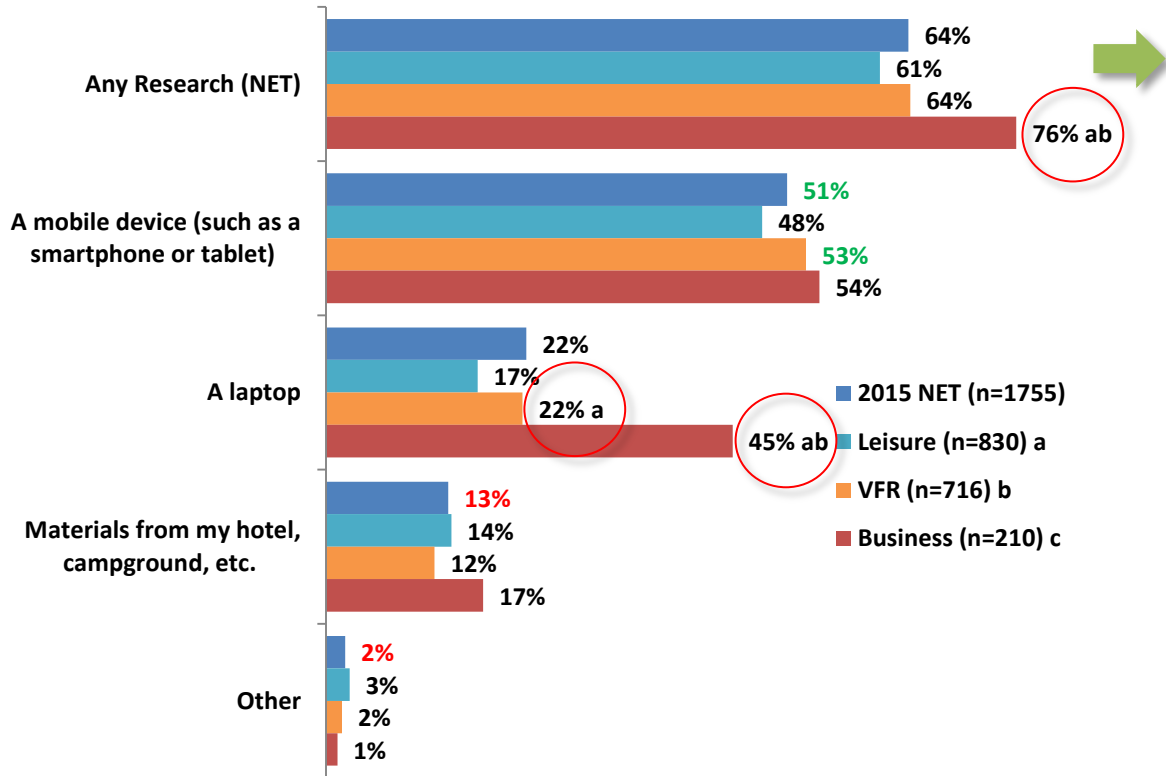
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Nearly two-thirds of day visitors continue to research Maine after they've arrived in the State.

- 2015 showed another increase in the proportion of overnight visitors that used their *mobile device* to research the local area while in Maine (51% versus 45% in 2014)
- Travelers who used their mobile device or laptop for additional research while in Maine reported mostly accessing apps/websites such as Google, Google Maps, TripAdvisor, yelp, or other Maine websites.

### Trip Research While in Maine



**First time visitors, visitors traveling with children, and visitors younger than 45 are all more likely than their counterparts to continue researching Maine while visiting the State.**

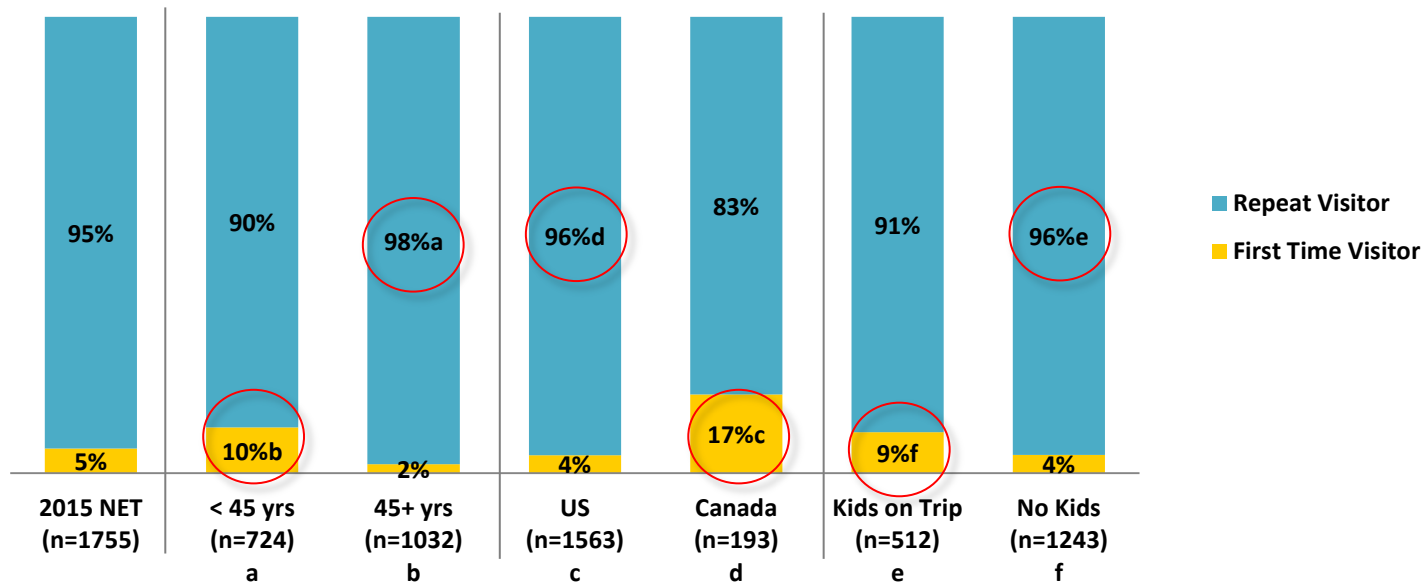
First time	Repeat
<93%>	62%
18-44 yrs	45+ yrs
<79%>	53%
Kids on Trip	No Kids
<76%>	59%

Q24. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitors illustrate continued evidence of strong visitor loyalty, with 95% being repeat visitors.

- Canadian day visitors are more likely than domestic day visitors to be visiting Maine for the first time (17% versus 4%), as are those traveling with kids and those under the age of 45.
- 2015 showed an increase in the proportion of first-time day visitors during the winter season (6% versus 3% in 2014).

## Repeat vs. First Time Visitors



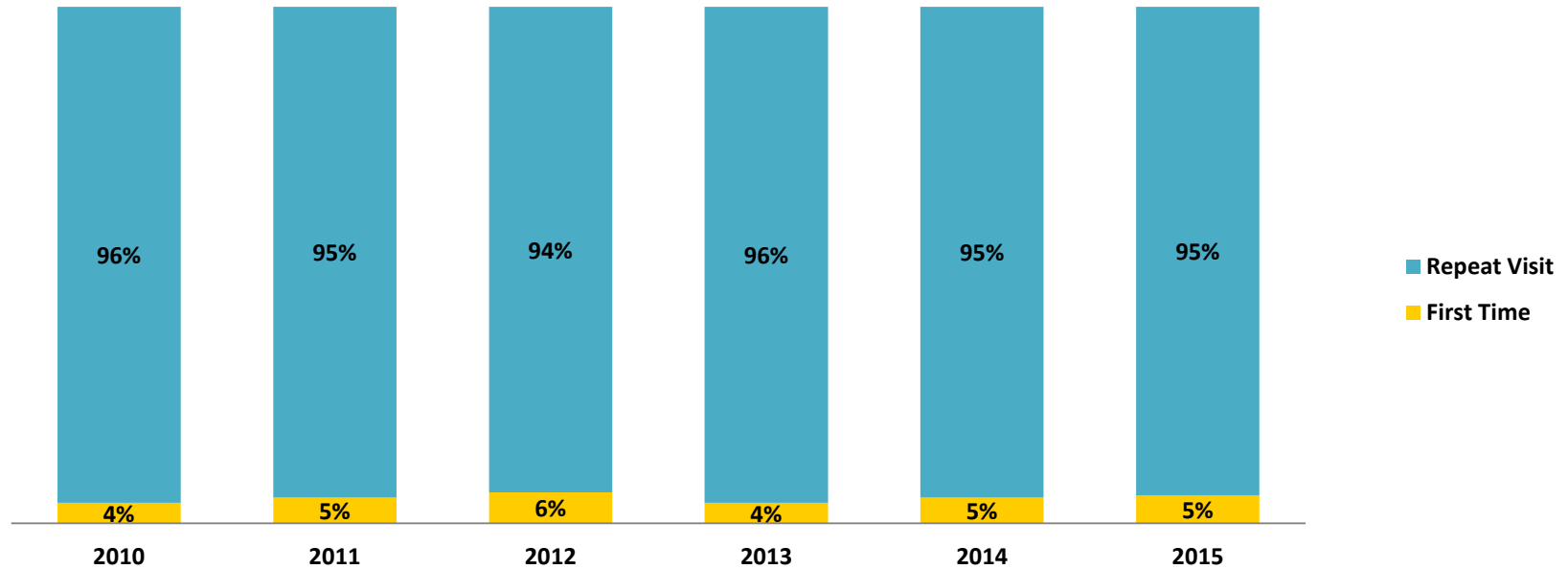
Q10. Was this your first trip to Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The relative proportion of first-time and repeat day visitors has been stable over the past six years.

## Repeat vs. First Time Visitors Trend 2010 to 2015



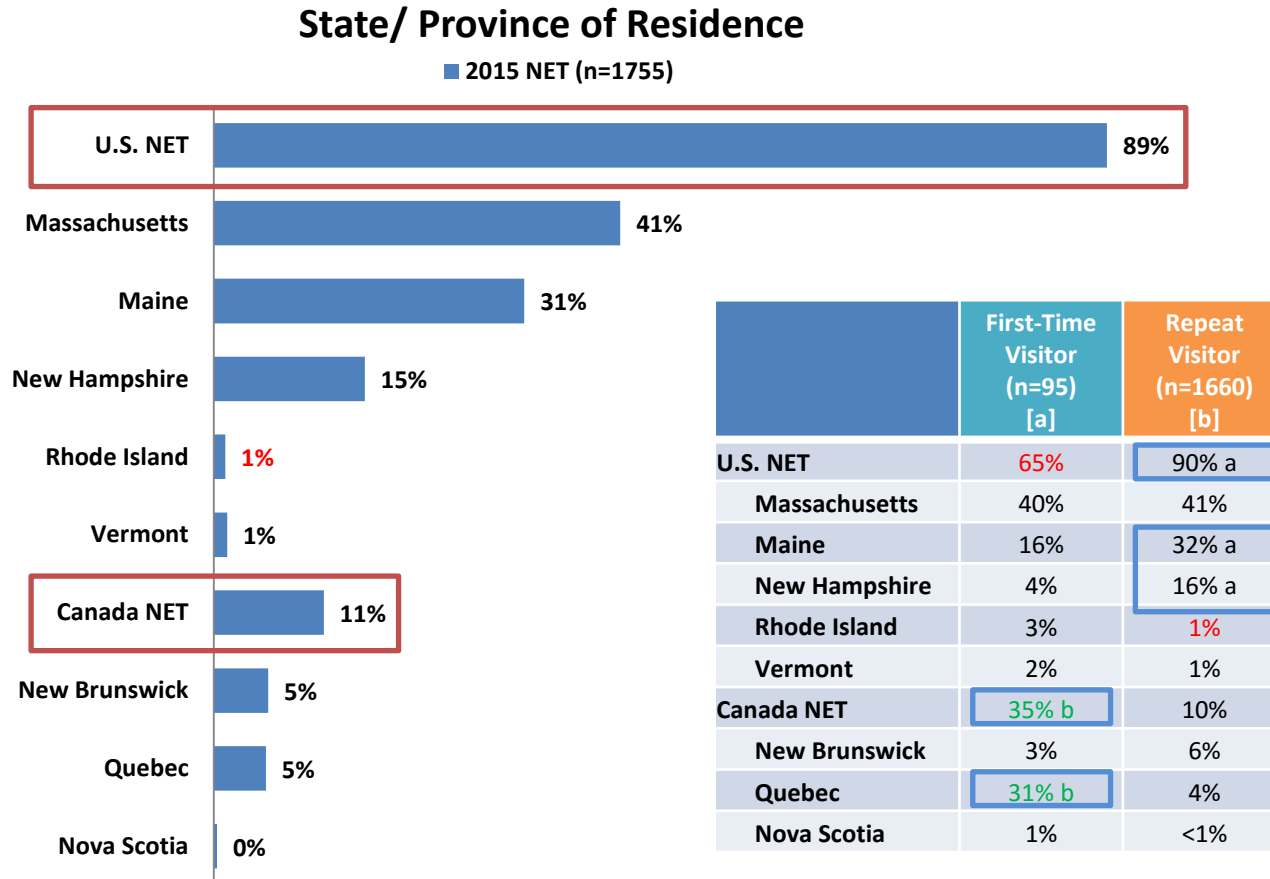
Q10. Was this your first trip to Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Massachusetts and Maine continue to provide the highest proportions of Maine day visitors.

- Repeat day visitors are more likely to come from the U.S. than are first-time visitors, particularly from Maine and New Hampshire.



Q2. In which state or province do you live?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitor origin varies by trip type and season of visit.

- Leisure visitors are most likely to come from Massachusetts; business travelers are most likely to be in-state visitors; and VFR visitors are most likely to be from Massachusetts and Maine.
- US day visitors are more prevalent during the Winter and Summer months, while day visitors from Canada are most likely to visit during the Fall months.

	NET 2015 (n=1755)	Leisure (n=830) [a]	VFR (n=716) [b]	Business (n=210) [c]	Winter (n=215) [d]	Summer (n=1209) [e]	Fall (n=331) [f]
<b>U.S. NET</b>	89%	85%	94% a	88%	89% f	91% f	83%
<b>Massachusetts</b>	41%	46% bc	39% c	27%	37%	42%	37%
<b>Maine</b>	31%	18%	40% a	52% ab	33%	32%	27%
<b>New Hampshire</b>	15%	19% bc	13% c	7%	16%	15%	15%
<b>Rhode Island</b>	1%	2%	1%	1%	1%	1%	2% e
<b>Vermont</b>	1%	1%	1%	2%	2%	1%	1%
<b>Canada NET</b>	11%	15% b	6%	12%	11%	9%	17% de
<b>New Brunswick</b>	5%	8% b	3%	5%	6%	5%	7%
<b>Quebec</b>	5%	6%	4%	6%	4%	4%	10% de
<b>Nova Scotia</b>	<1%	<1%	<1%	<1%	1%	<1%	<1%

Q2. In which state or province do you live?

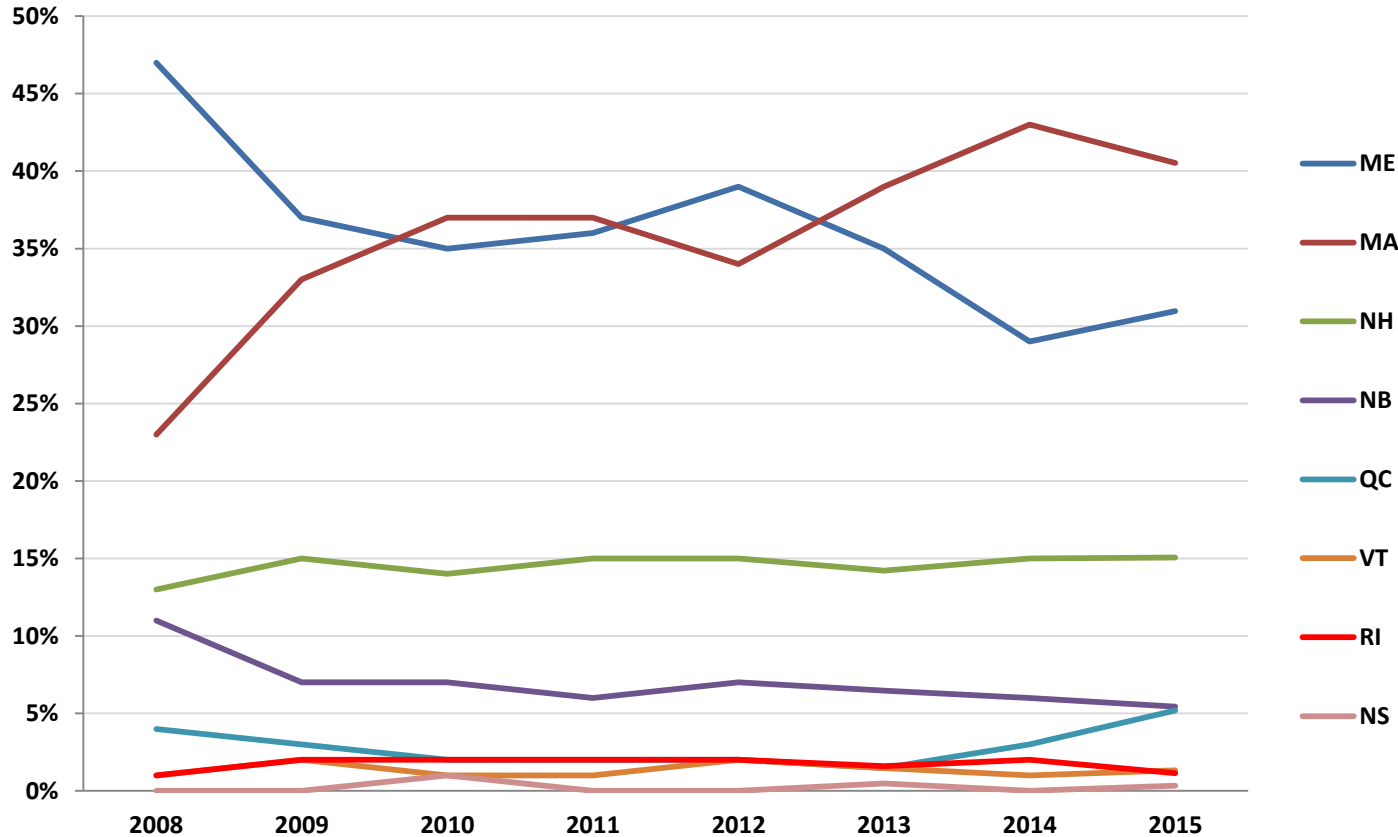
a, b, c indicates significant difference at the 95% confidence level

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# The sizable shift between the proportion of in-state day visitors and those from Massachusetts in 2014 appears to be stabilizing.

## Maine Day Visitor Origin



Q2. In which state or province do you live?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

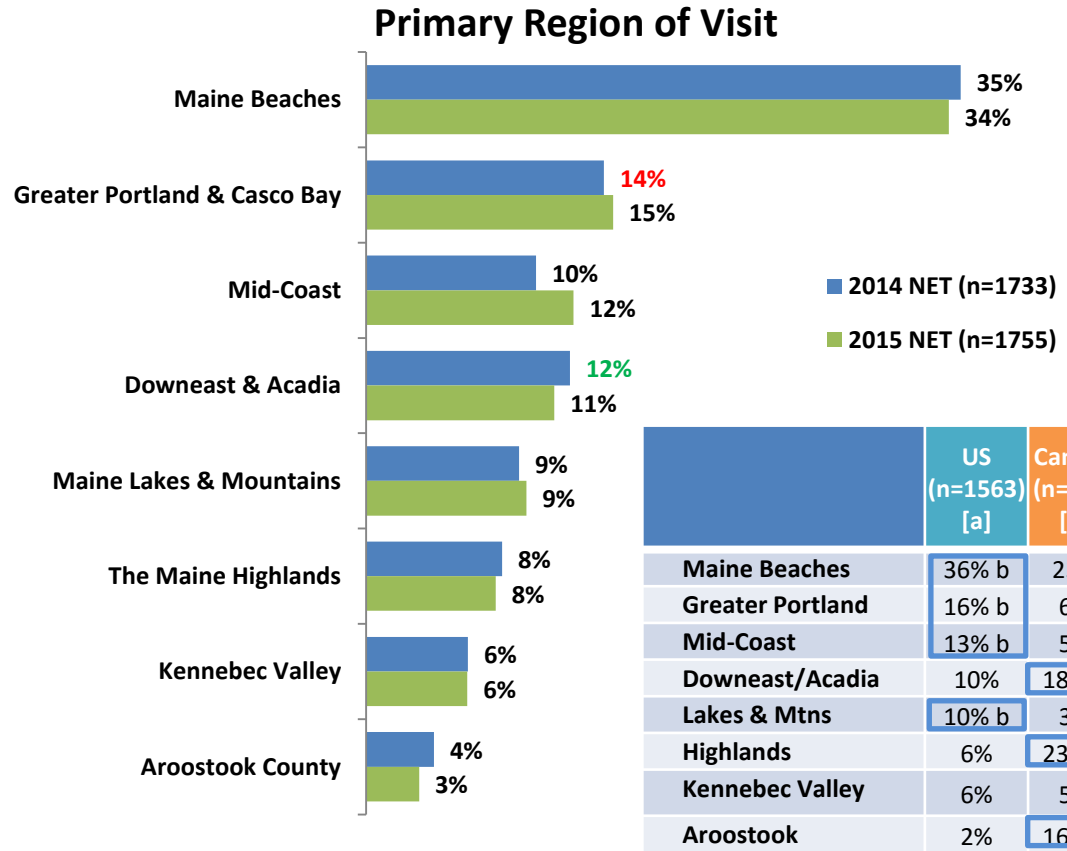
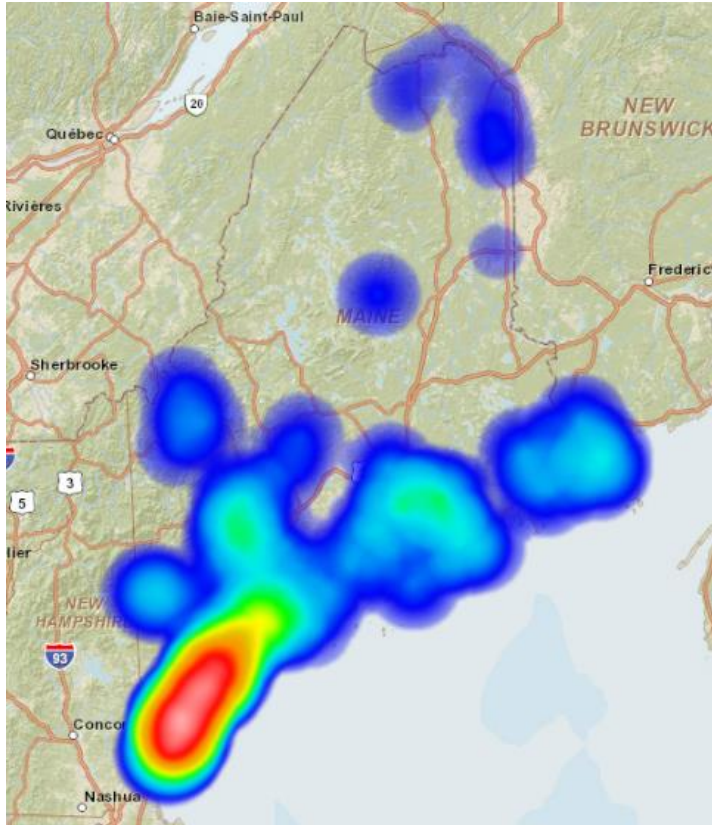
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The Maine Day Visitor Experience



# Once again, day visitation centered mostly around the Maine Beaches region in 2015.

- As seen in the table below, US and Canadian day visitors differ in the primary regions they choose to visit in Maine. Canadian day visitors are more likely than US visitors to be drawn to the *Downeast/Acadia* region, the *Maine Highlands*, and *Aroostook County*.



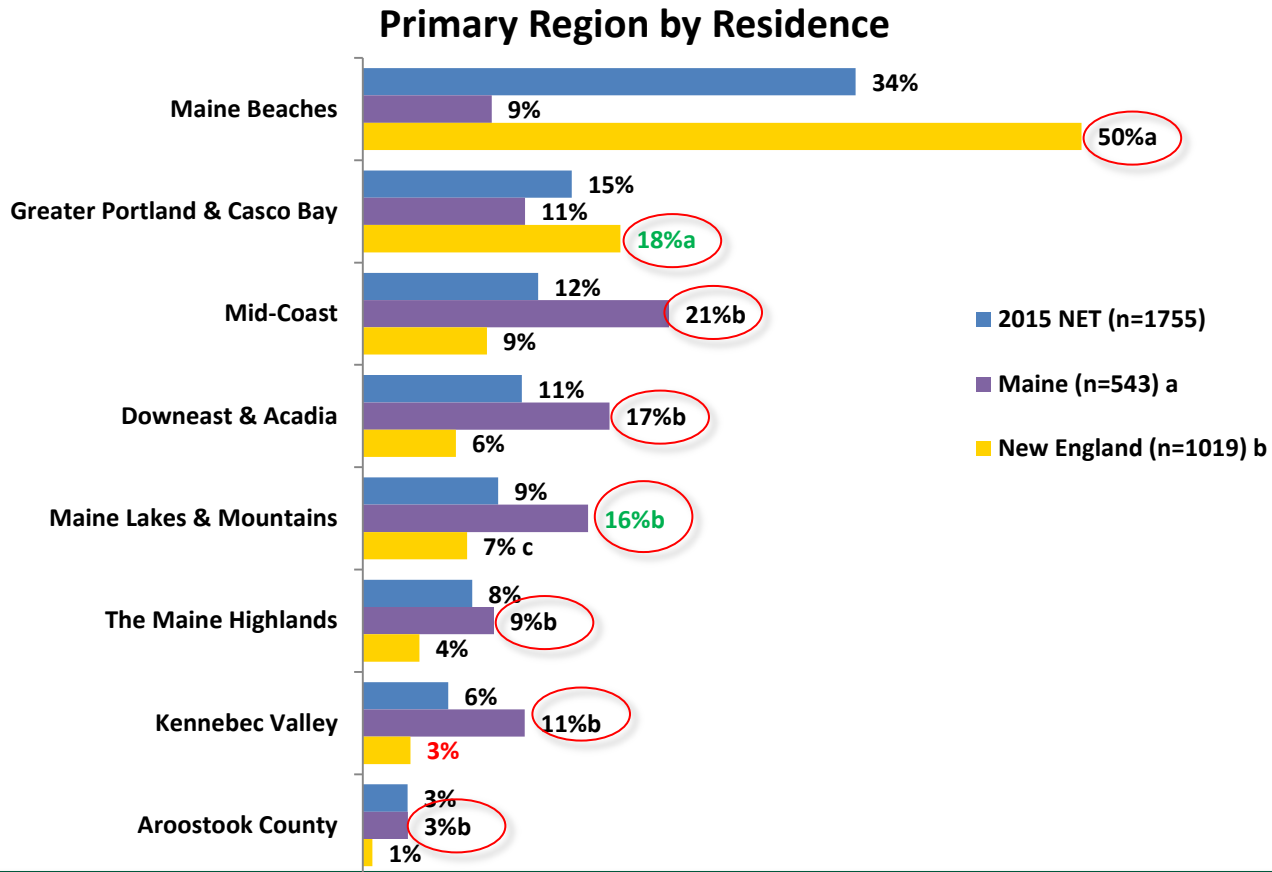
Q20. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# U.S. visitor origin also influences the primary region visited.

- When compared to residents of Maine, residents of other New England states are more likely to visit the *Maine Beaches* and *Greater Portland* regions. In-state visitors are more likely to visit the remaining regions within Maine.



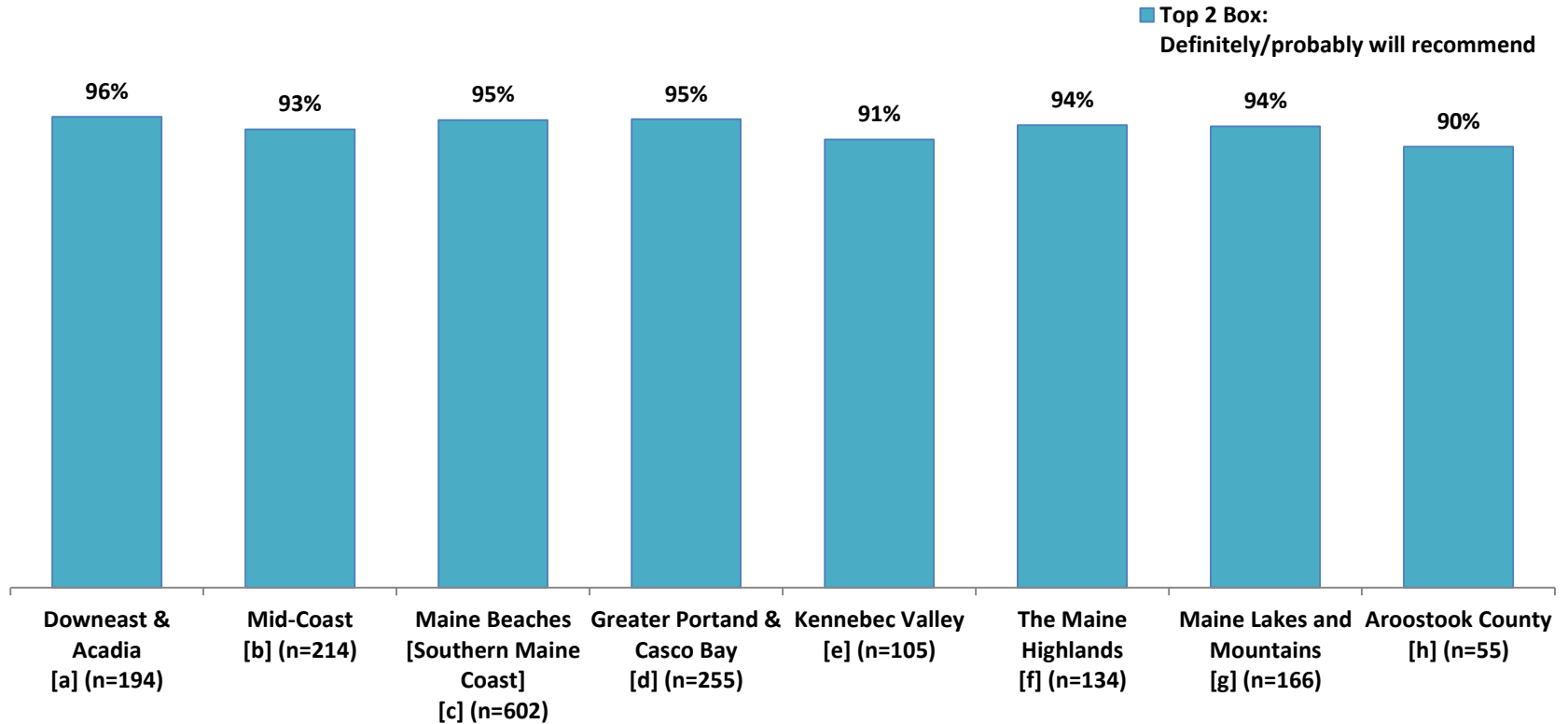
Q20. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitors show overwhelming intent to recommend the primary region they visited to friends/relatives.

Likelihood to Recommend Region to Friends/Relatives

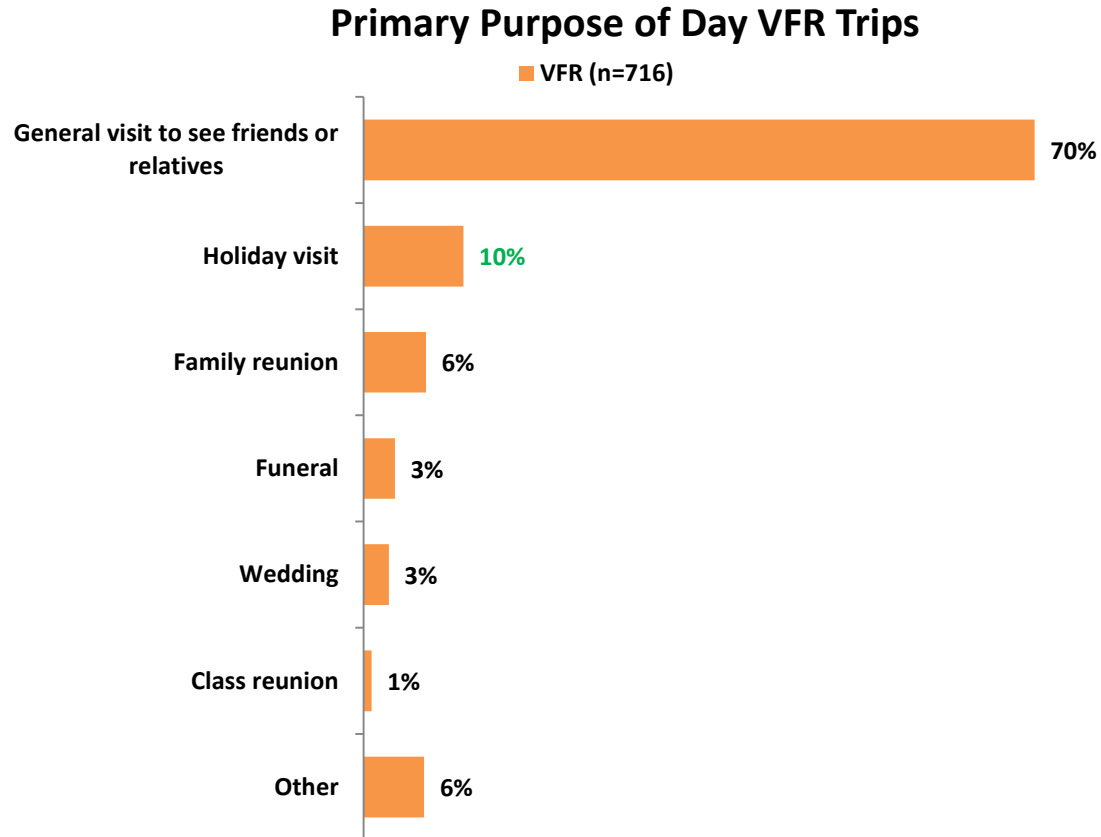


Q21. How likely will you be to recommend the [primary region visited] to friends or relatives?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

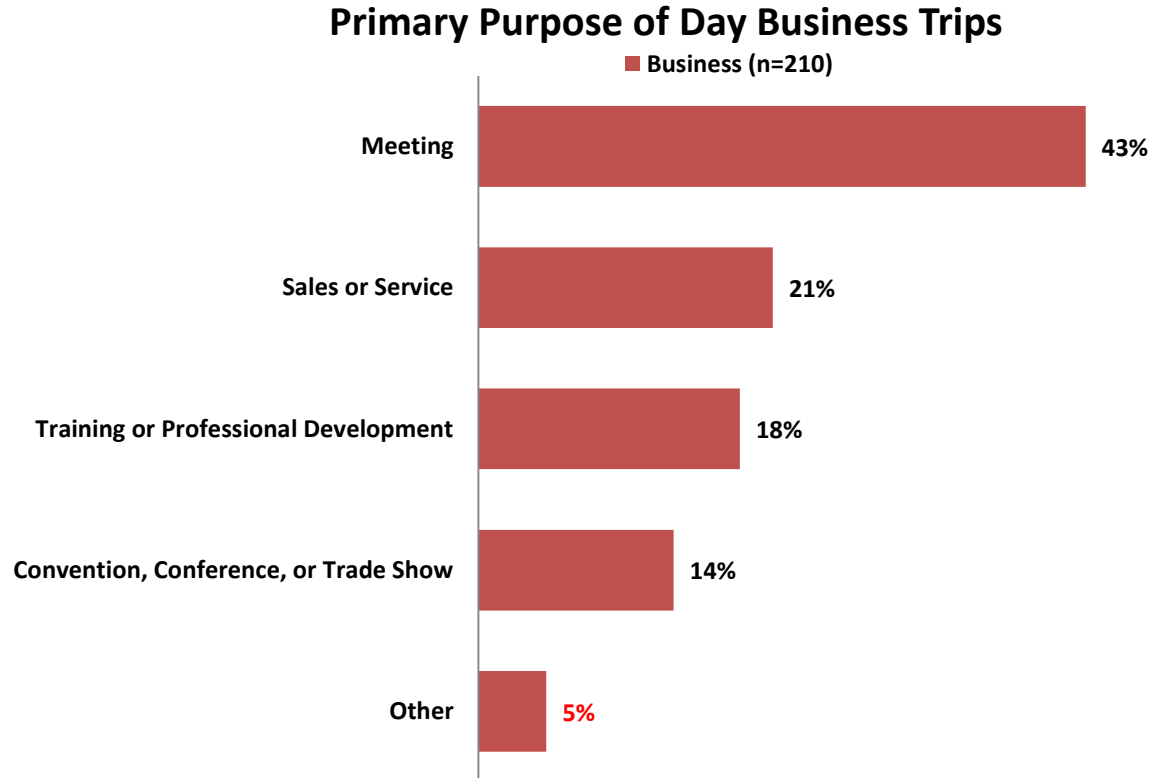
# Most VFR day visitors are on a general visit to see friends or relatives.



Q9. What was the primary purpose of your most recent day trip visit to friends or relatives in Maine?  
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# General meetings are the primary draw for business day travel to Maine.



Q8. What was the primary purpose of your most recent business day trip in Maine?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

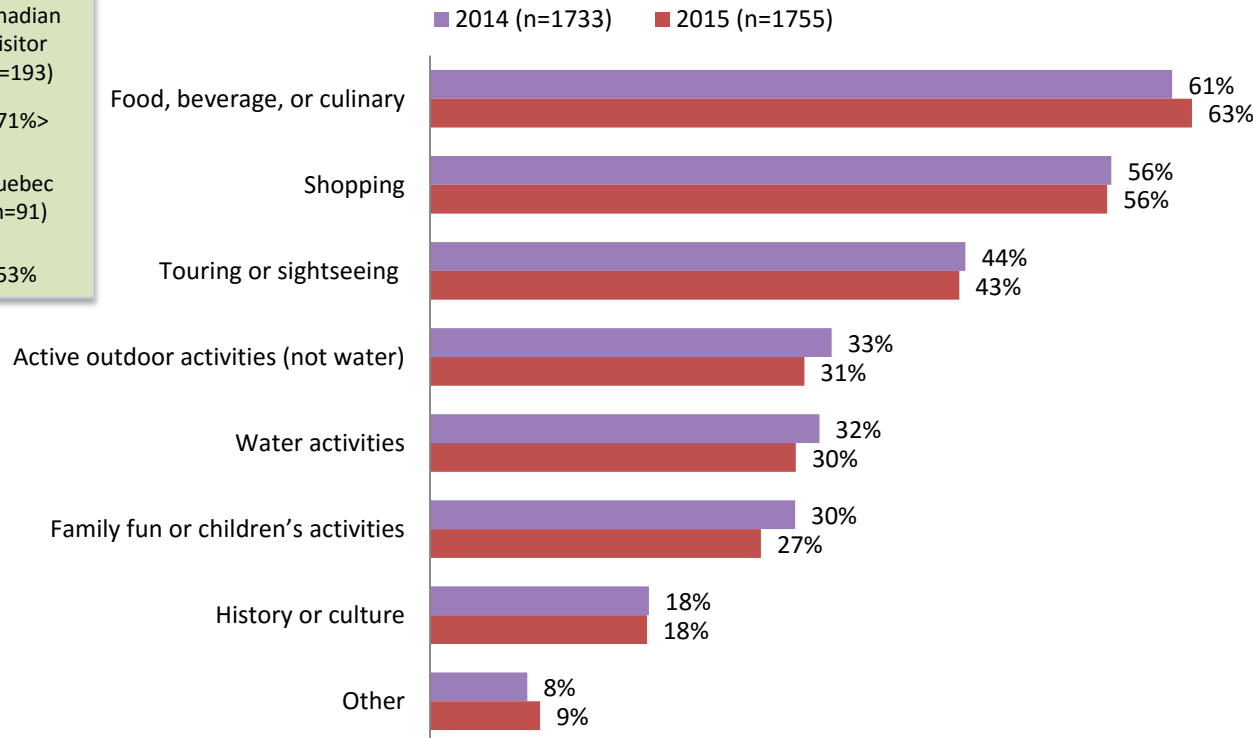
# Food/beverage/culinary activities and shopping are the most popular interest areas of day visitors.

- Among those who selected *family fun or children’s activities* as an interest area, more than half (54%) ranked it as the most important interest in their decision to visit Maine. Forty-four percent of those who selected *touring/sightseeing* selected that interest as their most important.

### Shopping Interest 2015

US Visitor (n=1563)	Canadian Visitor (n=193)
54%	<71%>
Maritime Provinces (n=101)	Quebec (n=91)
<86%>	53%

### Interest Areas



### Most Important Interest Area

2014	2015
24%	29%
28%	28%
43%	44%
38%	36%
38%	33%
55%	54%
18%	21%
77%	86%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 80

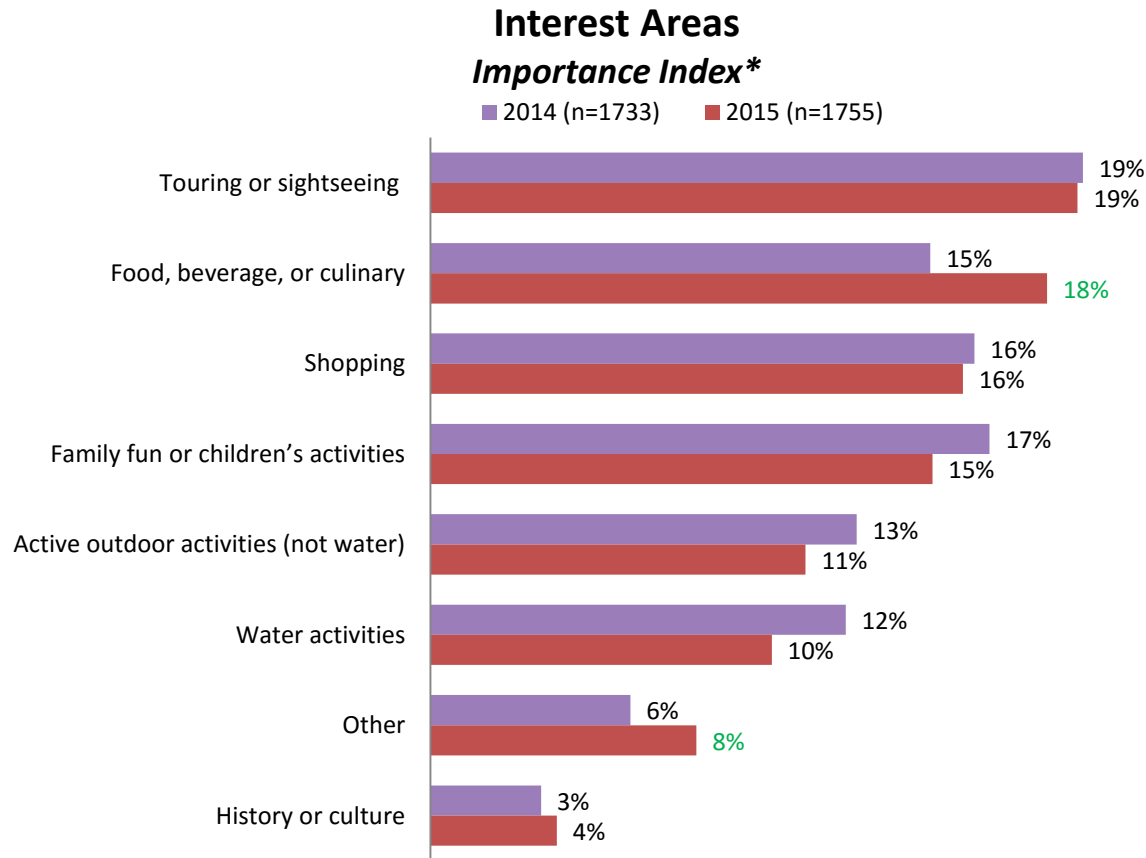
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# Touring/sightseeing and food/beverage/culinary activities rank highest when interest and importance are analyzed in combination.

- The importance index for the *food/beverage/culinary* interest area has increased between 2014 and 2015.



\*Importance Index = percentage selecting category as interest area X percentage listing same interest area as most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? Please check all that apply.

Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 81

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

# Day visitors' interest areas differ depending on age, season of visit, and presence of children.

- Not surprisingly, *water activities* are more likely to be an interest during the Summer months. *Touring/sightseeing* activities are more popular during the Summer and Fall months.
- Visitors traveling with children are more likely to list active interest areas such as *active outdoor activities*, *water activities*, *family fun or children's activities*, and *shopping*. These active interest areas are also more popular among younger travelers (< 45 years).

Interest Area	NET 2015 (n=1755)	Kids on Trip		Age		Season		
		Kids (n=512) a	No Kids (n=1243) b	<45 (n=724) c	45+ (n=1032) d	Winter (n=215) e	Summer (n=1209) f	Fall (n=331) g
Food, beverage, or culinary	63%	62%	63%	67% <sup>d</sup>	59%	61%	64%	59%
Shopping	56%	63% <sup>b</sup>	52%	61% <sup>d</sup>	52%	57%	56%	54%
Touring or sightseeing	43%	45%	43%	42%	44%	34%	44% <sup>e</sup>	46% <sup>e</sup>
Active outdoor activities (not water)	31%	39% <sup>b</sup>	27%	41% <sup>d</sup>	23%	29%	31%	31%
Water activities	30%	42% <sup>b</sup>	25%	37% <sup>d</sup>	25%	16%	35% <sup>eg</sup>	20%
Family fun or children's activities	27%	59% <sup>b</sup>	14%	39% <sup>d</sup>	19%	24%	28%	27%
History or culture	18%	20%	17%	18%	17%	16%	18%	19%
Other	9%	4%	11% <sup>a</sup>	4%	13% <sup>c</sup>	8%	9%	10%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

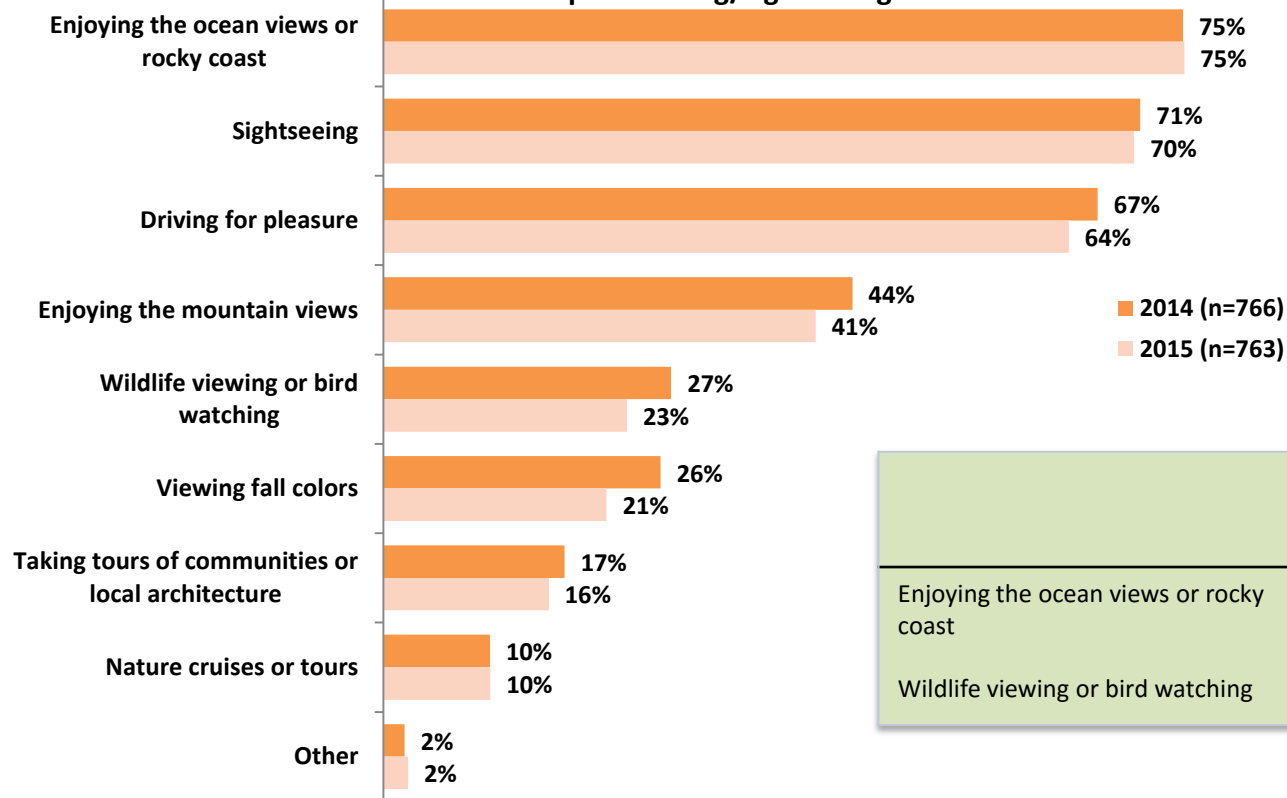
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitors who selected touring/sightseeing as an interest area are most likely to *enjoy the ocean views or rocky coast*.

- *General sightseeing* and *driving for pleasure* are also popular touring/sightseeing activities undertaken by day visitors.
- Day visitors 45 years of age and older are more likely to spend time *enjoying the ocean views or rocky coast* while in Maine, while those under the age of 45 are more likely to do some *wildlife viewing or bird watching*.

## Touring or Sightseeing Activities

Base: Those who report touring/sightseeing as an interest area for this Maine trip



	< 45 yrs (n=307) a	45+ yrs (n=457) b
Enjoying the ocean views or rocky coast	70%	79% <sup>a</sup>
Wildlife viewing or bird watching	28% <sup>b</sup>	20%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

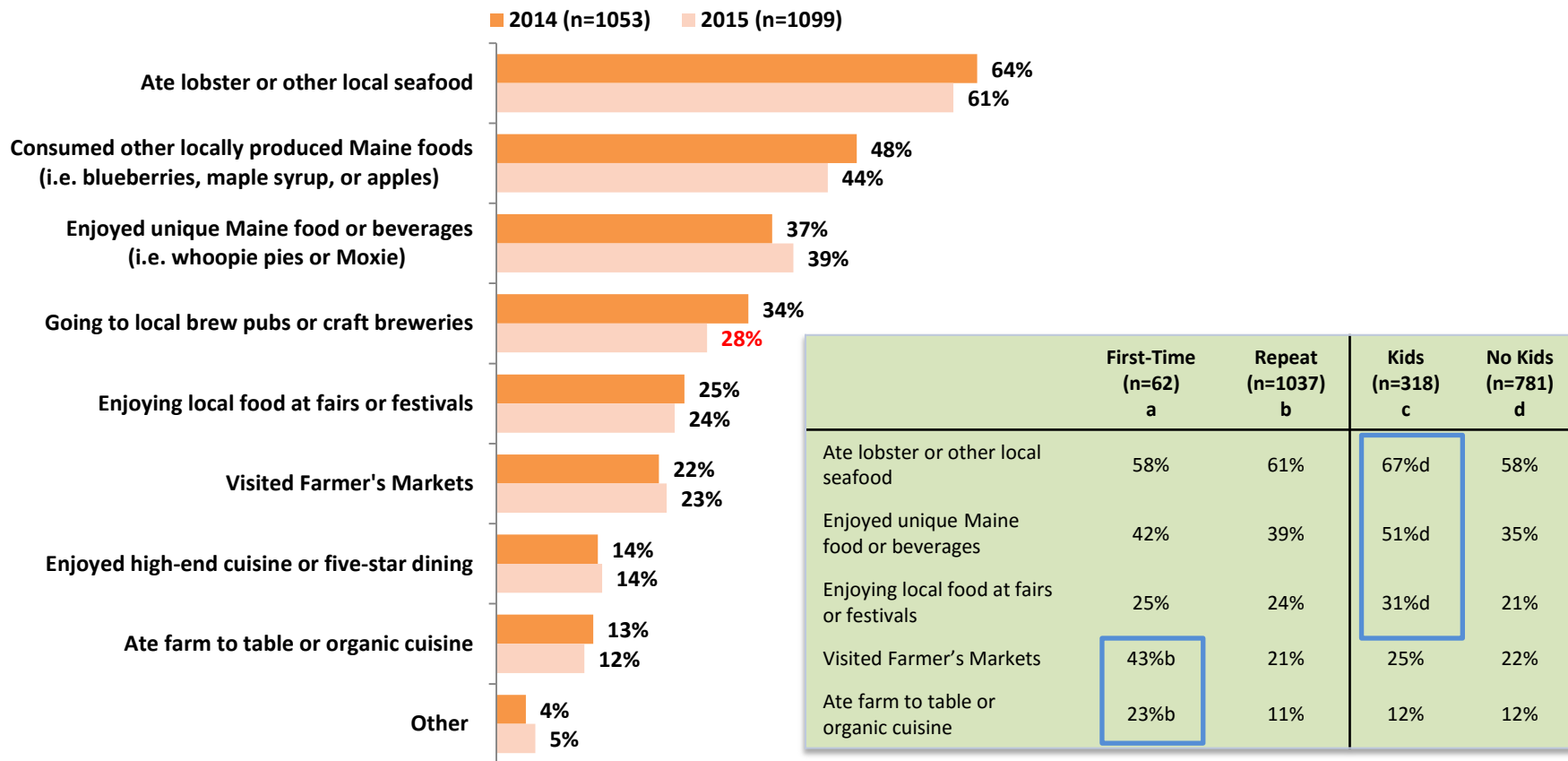
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Eating lobster or local seafood is the most popular activity for day visitors interested in food/beverage/culinary activities.

- Those traveling with children are more likely to eat lobster or local seafood, enjoy unique Maine food or beverages, and enjoy local food at fairs or festivals.

## Food, Beverage, or Culinary Activities

Base: Those who report food/beverage/culinary activities as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

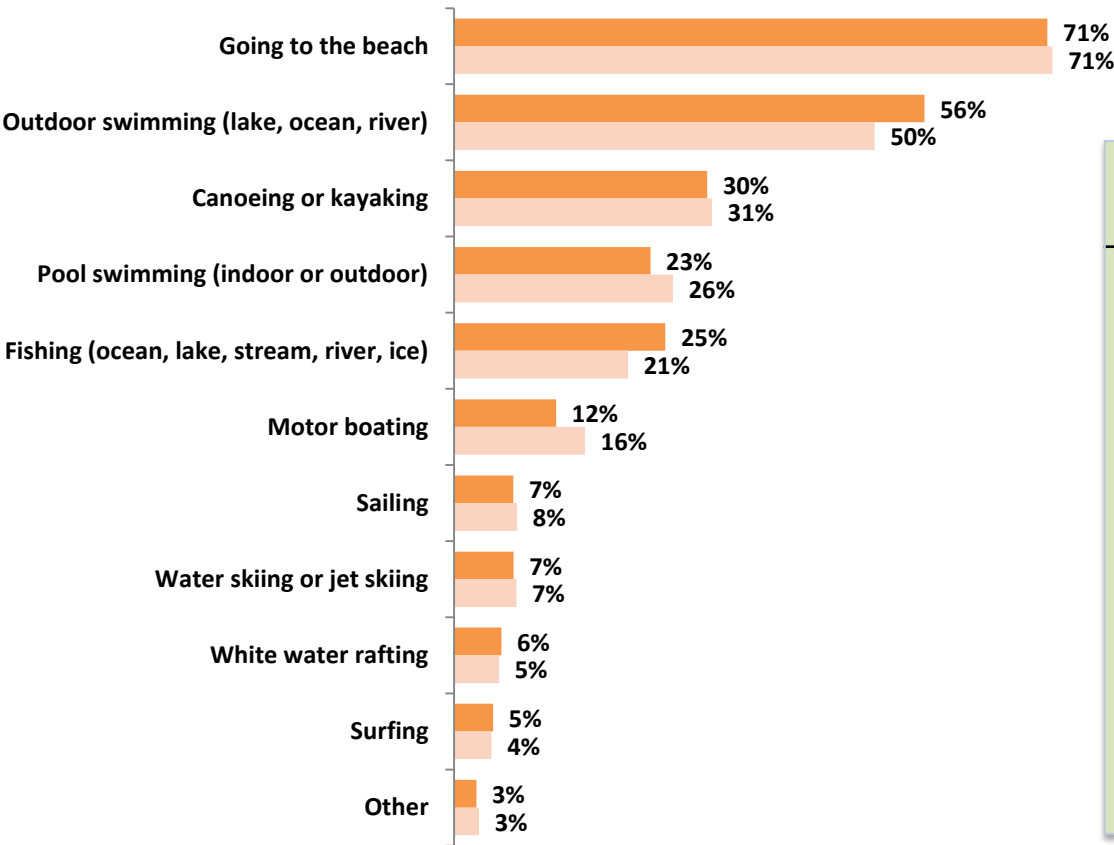
# Among day visitors interested in water activities, going to the beach is the most popular activity.

- Younger day visitors are more likely to participate in a number of water activities, as seen in the table below. Those traveling with children are more likely to do some *pool swimming, fishing, or water skiing/jet skiing* while in Maine.

## Water Activities

Base: Those who report water activities as an interest area for this Maine trip

2014 (n=559) 2015 (n=528)



	< 45 yrs (n=280) a	45+ yrs (n=258) b	Kids (n=216) c	No Kids (n=311) d
Going to the beach	72%	71%	74%	70%
Outdoor swimming	56% <sup>b</sup>	44%	56%	46%
Canoeing or kayaking	30%	32%	33%	29%
Pool swimming	37% <sup>b</sup>	15%	36% <sup>d</sup>	19%
Fishing	30% <sup>b</sup>	12%	28% <sup>d</sup>	16%
Motor boating	14%	18%	16%	16%
Sailing	9%	6%	5%	9%
Water skiing or jet skiing	11% <sup>b</sup>	4%	11% <sup>d</sup>	5%
White water rafting	8% <sup>b</sup>	2%	8%	3%
Surfing	7% <sup>b</sup>	2%	6%	3%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

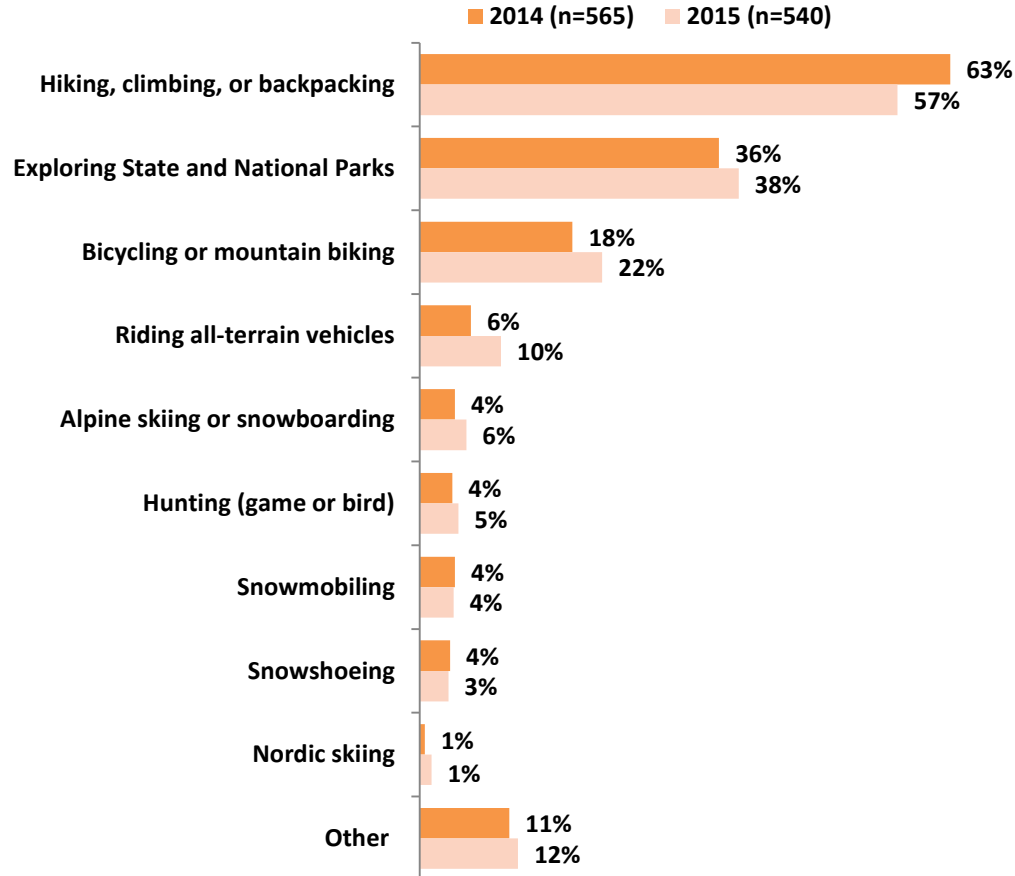
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The majority of day visitors interested in non-water active outdoor activities engage in *hiking/climbing/backpacking* while in Maine.

## Active Outdoor Activities (Non-Water)

Base: Those who report active non-water outdoor activities as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

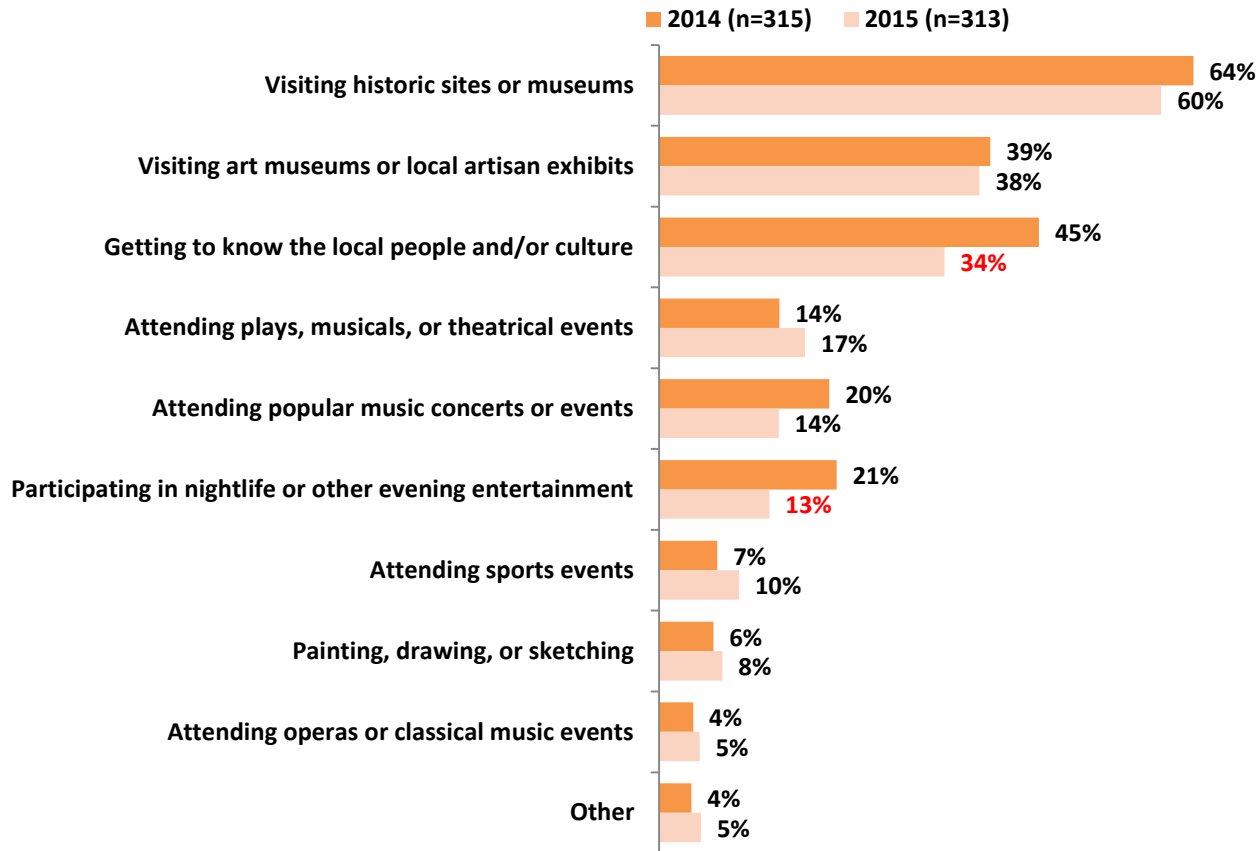
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Visiting historic sites or museums is the most popular pursuit among day visitors interested in history/culture.

- Visiting art museums or local artisan exhibits and getting to know the local people and/or culture were also popular activities.

## History or Culture Activities

Base: Those who report history or culture as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitors who are interested in shopping are most likely to shop at the *outlets* while in Maine.

- Canadian day visitors are more likely to do some *general mall/downtown shopping*, while domestic day visitors are more likely to shop for *unique, locally produced goods, antiques and local arts/crafts, and products with the 'Made in Maine' identifier*.

## Shopping Activities

Base: Those who report shopping as an interest area for this Maine trip

2014 (n=972) 2015 (n=977)



	US (n=841) a	Canada (n=136) b
Outlet shopping	58%	60%
General shopping at malls, downtown	38%	65% <sup>a</sup>
Shopping for unique, locally produced goods	29% <sup>b</sup>	15%
Shopping for gifts or souvenirs	27%	23%
Shopping for antiques, local arts and crafts	26% <sup>b</sup>	11%
Shopping for products with the "Made in Maine" identifier	20% <sup>b</sup>	13%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



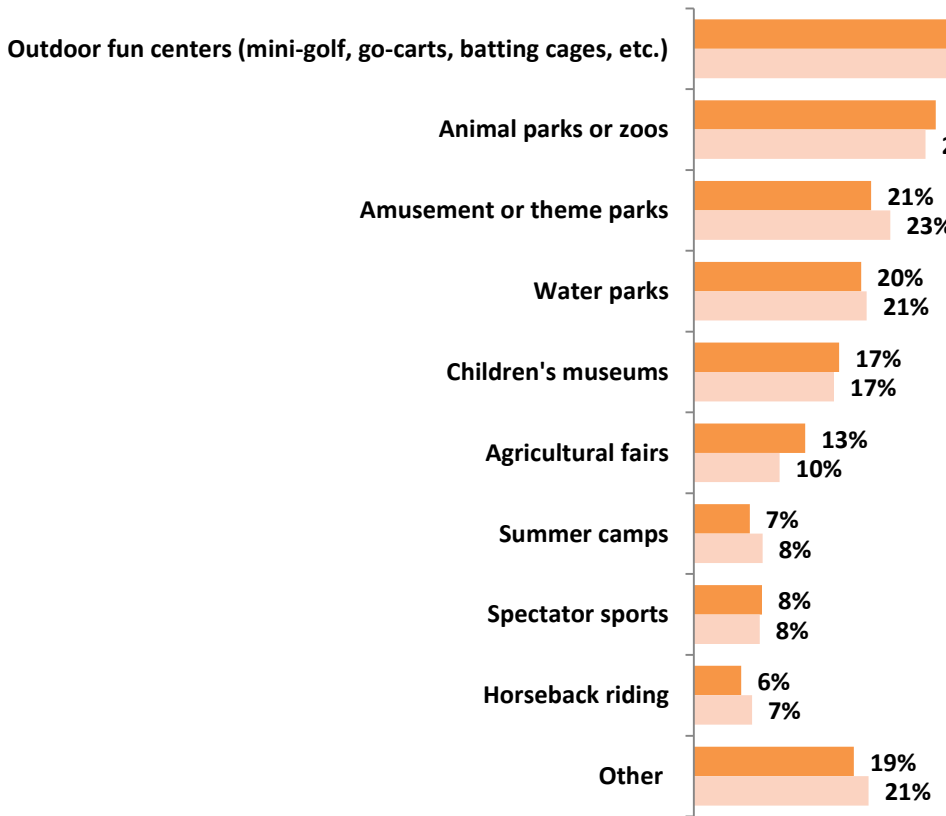
# Among day visitors interested in family fun/children’s activities, the highest proportion enjoyed time at *outdoor fun centers*.

- As expected, several family fun/children’s activities are more popular among younger day visitors (< 45 years) and day visitors traveling with children.

## Family Fun/Children’s Activities

Base: Those who report family fun/children’s activities as an interest area for this Maine trip

2014 (n=515) 2015 (n=477)



	<45 yrs (n=284) a	45+ yrs (n=193) b	Kids (n=302) c	No Kids (n=213) d
Outdoor fun centers	45% b	23%	45% d	20%
Animal parks or zoos	37% b	14%	36% d	13%
Amusement or theme parks	28% b	17%	28% d	16%
Water parks	25% b	13%	23%	17%
Children's museums	21% b	11%	21% d	10%
Agricultural fairs	9%	12%	10%	11%
Summer camps	11% b	5%	9%	7%
Spectator sports	7%	9%	7%	9%
Horseback riding	9% b	3%	6%	9%

Q19. In which of the following activities did you participate during this trip? Please check all that apply.

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

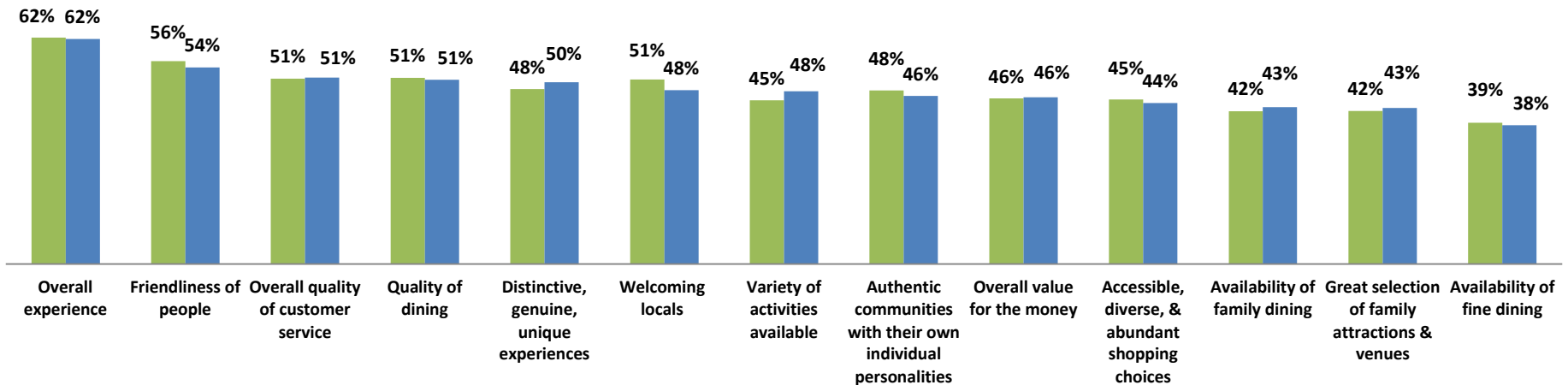
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitors gave the highest marks for the *overall experience* and the *friendliness of the people* having surpassed their expectations.

- More than half of day visitors indicate that their Maine visit either *far exceeded their expectations* or was *somewhat above their expectations* in a number of categories, several again related to Maine’s people.

## Maine Far Exceeded/Somewhat Above My Expectations\*

■ Top 2 Box 2014 (n=1733)    ■ Top 2 Box 2015 (n=1755)



Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Younger day visitors are more likely to report that Maine exceeded their expectations on most attributes.

## Maine Far Exceeded/Somewhat Above My Expectations (Top 2 Box)

	NET 2015 (n=1755)	< 45 yrs (n=724) [a]	45+ yrs (n=1032) [b]	Kids on Trip (n=512) c	No Kids on Trip (n=1243) d
Overall experience	62%	66%b	59%	64%	61%
Friendliness of people	54%	56%	53%	56%	54%
Quality of dining	51%	54%b	48%	53%	50%
Overall quality of customer service	51%	55%b	49%	56%d	50%
Distinctive, genuine, and unique experiences	50%	55%b	47%	55%d	48%
Welcoming locals who make visitors feel comfortable	48%	52%b	45%	52%	46%
Variety of activities available	48%	54%b	43%	56%d	44%
Authentic communities with their own individual personalities	46%	52%b	42%	50%	45%
Overall value for the money	46%	51%b	43%	48%	45%
Accessible, diverse, and abundant shopping choices	44%	48%b	42%	47%	43%
Great selection of family attractions and venues	43%	50%b	38%	53%d	39%
Availability of family dining	43%	49%b	39%	53%d	39%
Availability of fine dining	38%	41%	37%	41%	37%

Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

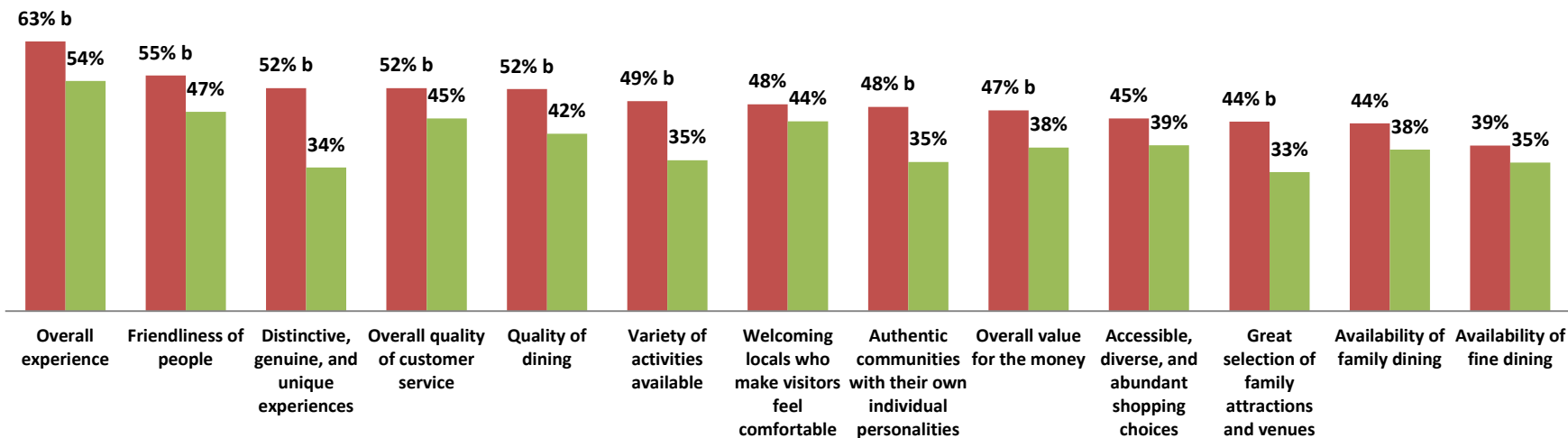
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Domestic day visitors are more likely than Canadian visitors to indicate that Maine exceeded their expectations on many attributes.

## Maine Far Exceeded/Somewhat Above My Expectations

■ United States (n=1563) a    ■ Canada (n=193) b



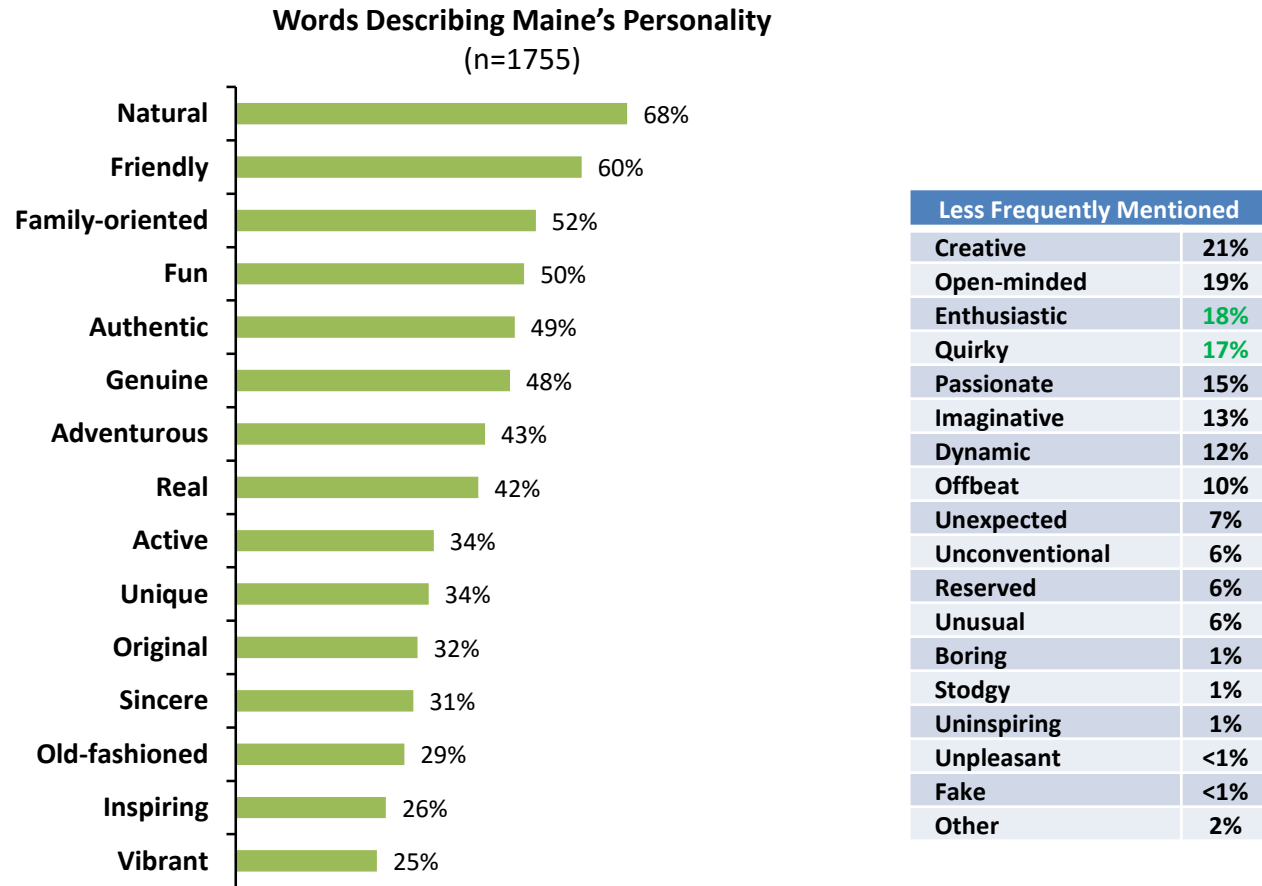
Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# “Natural” and “Friendly” are among the top words selected by day visitors to describe Maine’s personality.

- Two-thirds of Maine’s day visitors selected “natural” to describe Maine’s personality, if Maine were a person. Nearly as many (60%) selected “friendly.” Words selected by 1% or fewer included *boring*, *stodgy*, *uninspiring*, *unpleasant*, and *fake*.



Q33. If Maine were a person, which of the following words would you choose to describe its personality? Please check all that apply.  
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Key Visitor Metrics



# Overnight visitor spending averaged just under \$1,000 per travel party, with the highest proportion spent on lodging.

- Business and leisure travelers spent significantly more money than travelers visiting friends and relatives.

## Overnight Visitor Spending Average Expenditures per Travel Party\*

2015 Overnight Travel Spending	2014 Total (n=2930)	2015 Total (n=2779)	2015 Leisure (n=1249) (a)	2015 VFR (n=1036) (b)	2015 Business (n=494) (c)
<b>Total Net Spending</b>	\$906	<b>\$966</b>	<b>\$1,033 b</b>	\$761	<b>\$1,229 ab</b>
Lodging	\$365	<b>\$417</b>	\$448 b	\$266	<b>\$657 ab</b>
Food	\$218	\$219	\$236 bc	\$202	\$212
Retail Goods	\$129	\$140	\$154 b	\$119	\$147 b
Transportation	\$141	<b>\$128</b>	\$130	<b>\$119</b>	\$146 b
Recreation	\$54	<b>\$62</b>	<b>\$65 b</b>	\$55	\$68 b

\*Reported figures represent the average amount of money spent per travel party, including parties that spent \$0.

Q32. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below. <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day visitor spending averaged just under \$300 per travel party, with the highest proportion spent on food.

- Unlike overnight visitors, day travelers visiting Maine for different reasons (leisure, business, VFR) spent about the same amount of money.
- Leisure day visitors spent less in 2015, on average, than did 2014 leisure day visitors.

## Day Visitor Spending Average Expenditures per Travel Party\*

2015 Day Travel Spending	2014 Total (n=1733)	2015 Total (n=1755)	2015 Leisure (n=830) (a)	2015 VFR (n=716) (b)	2015 Business (n=210) (c)
<b>Net Spending</b>	\$304	<b>\$283</b>	<b>\$280</b>	\$281	\$298
Food	\$113	\$108	\$103	\$111	\$121
Retail Goods	\$85	\$79	\$87	\$74	\$68
Transportation	\$73	<b>\$65</b>	<b>\$62</b>	\$67	\$72
Recreation	\$32	\$30	\$29	\$29	\$37

\*Reported figures represent the average amount of money spent per travel party, including parties that spent \$0.

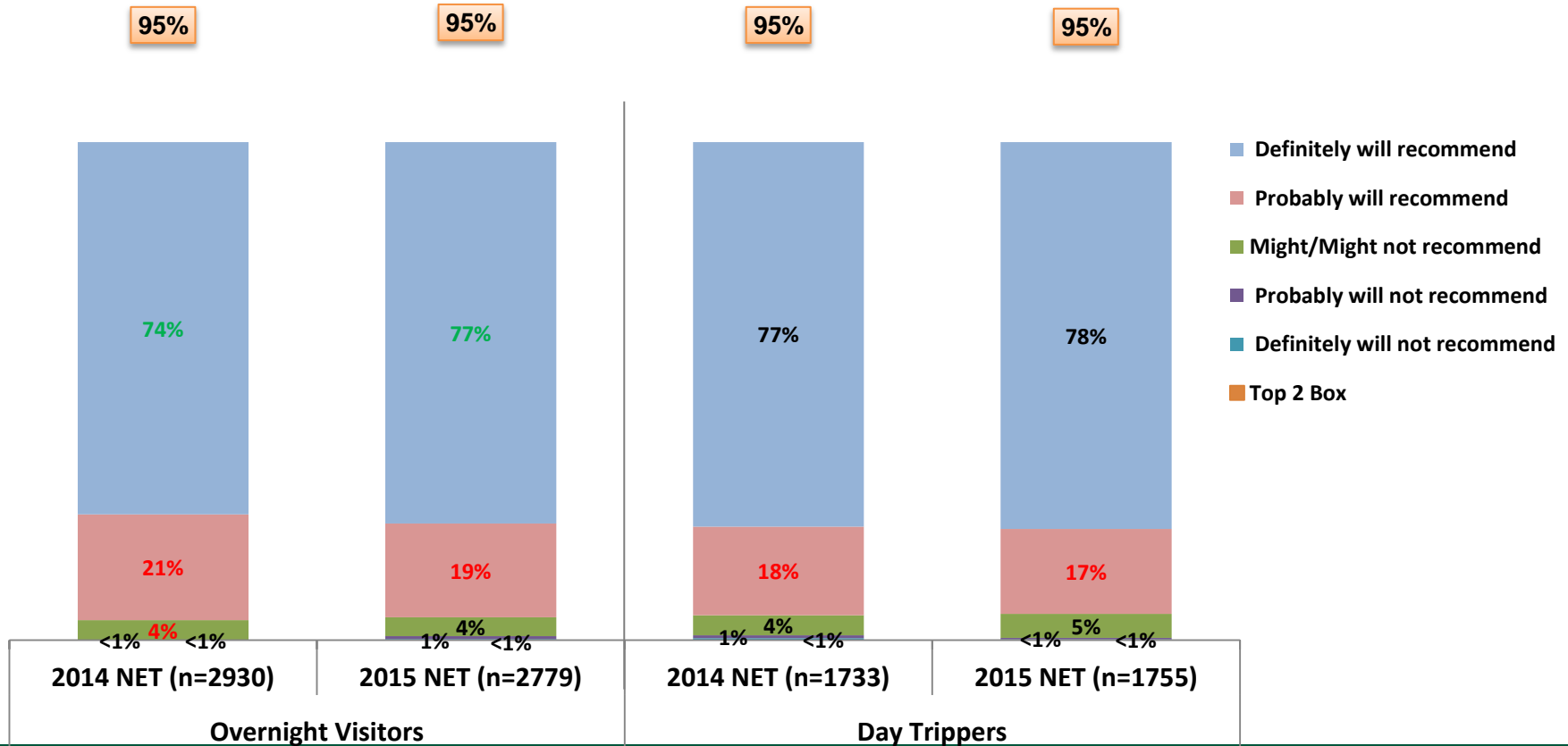
Q26. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below. <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# Maine visitors continue to express a high claimed intent to recommend the State to family and/or friends.

- Domestic day visitors are more likely than Canadian day visitors to indicate that they plan to recommend Maine as a vacation destination (95% versus 91%). Similarly, day visitors traveling with children are more likely to recommend Maine (97% versus 94% of those traveling without children).

## Likelihood to Recommend Maine



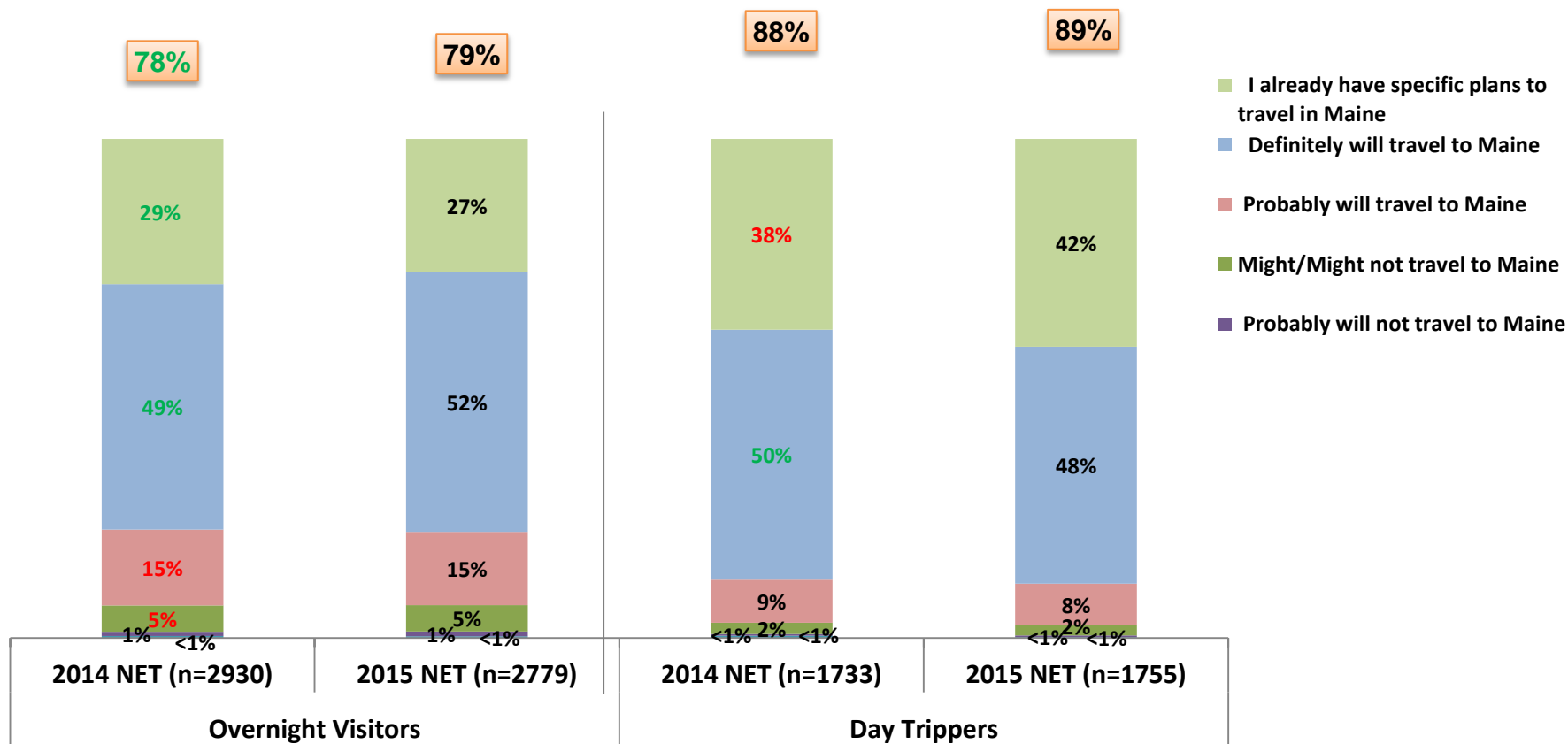
Overnight Q39, Day Q31. How likely will you be to recommend Maine as a vacation destination to friends or relatives?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Future intent to visit Maine also remains high.

## Likelihood to Travel to Maine in Future



Overnight Q38, Day Q30. How likely will you be to travel in Maine in the next two years?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Visitors who are certain that they will visit Maine in the next two years exhibit differences from other visitors.

- Both domestic overnight and day visitors are more likely to report that they either *already have specific plans to travel in Maine in the next two years* or *definitely will travel to Maine* than are Canadian visitors.
- Overnight visitors staying in unpaid accommodations, as well as those traveling with children are also more likely to indicate that they will visit Maine in the next two years.

<u>Overnight Visitors</u> <i>Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit</i>	
US Resident (n=2430)	Canadian Resident (n=350)
<79%>	74%
Paid Accommodations (n=1977)	Unpaid Accommodations (n=802)
76%	<85%>
Kids on Trip (n=858)	No Kids (n=1922)
<83%>	77%

<u>Day Visitors</u> <i>Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit</i>	
US Resident (n=1563)	Canadian Resident (n=193)
<91%>	75%
Maine Resident (n=543)	New England Resident (n=1019)
<96%>	88%
First-Time Visitor (n=95)	Repeat Visitor (n=1660)
79%	<90%>

Overnight Q38, Day Q30. How likely will you be to travel in Maine in the next two years?

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Demographic Profile



# Visitor Demographics

	Overnight Visitors		Day Visitors	
	2014 (n=2930)	2015 (n=2779)	2014 (n=1733)	2015 (n=1755)
<b>Age:</b>				
< 35	29%	30%	24%	25%
35 – 44	19%	19%	16%	16%
45 – 54	20%	19%	22%	21%
55 +	32%	31%	38%	38%
Mean Age (Years)	45.4	45.4	47.9	48.0
<b>Income:</b>				
< \$50,000	16%	17%	22%	22%
\$50,000 - \$99,000	40%	41%	43%	43%
\$100,000 +	44%	42%	36%	35%
Estimated Mean Income	\$106,260	\$103,770	\$93,610	\$93,020
Female	54%	58%	56%	62%
College Degree or Higher	73%	73%	69%	68%
Married	66%	64%	64%	60%
Employed Full Time	62%	63%	54%	55%

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Conclusions



# Conclusions

- **Once again, the State of Maine exhibited strong year-over-year growth in tourism-related visitation to the State, capitalizing on positive nationwide economic influences.** In 2015, Maine enjoyed a substantial increase in both overnight (+4.0%) and day (+4.6%) visitation to the State. With declining gas prices, declining unemployment, and a declining Travel Price Index, vacation was more affordable for most travelers in 2015 than it had been in 2014. Notably, visitation during Maine's Fall season showed a larger year-over-year increase than did the Summer and Winter seasons for the second year in a row, suggesting the success of efforts to attract visitors to Maine during this shoulder season.
- **Though Canada remains a core travel market for Maine, the prolonged decline of the exchange rate continues to impact Canadians' purchasing power in Maine.** Maine experienced its largest year-over-year decline in Canadian visitation during the less-busy Fall season, yet held onto stable year-over-year visitation rates during the busy Summer season (and similarly during the Winter season). Continued marketing to this core market can help to improve the levels of Canadian visitation when conditions return to a more favorable economic climate for Canadians.

# Conclusions

- **Though the Internet and the recommendation of friends/family members remain the top resources visitors consulted when planning their visit to Maine, 2015 showed another increase in the proportion of visitors using *travel guides/brochures*.** In addition, when asked about research they continued to do once they were in Maine, 2015 showed a higher proportion using *materials from their hotel/campground*. Undoubtedly, an online presence is critical these days, but the survey results among Maine visitors point to the importance of destinations not abandoning the more traditional printed information delivery mediums. Clearly, these sources are still relevant and useful to visitors, and the data suggests that their importance could even be on an upswing.
- **Maine visitor satisfaction levels remain very high, and the majority of visitors also said they will spread the word about their positive experiences to family and friends.** At least half of Maine's overnight visitors in 2015 indicate that Maine either *exceeded* or was *somewhat above* their expectations in all 15 listed categories, and 95% of visitors indicate that they will recommend the State to friends/family as a destination. Considering the prevalence of Internet usage and specifically social media usage when planning vacation, Maine should consider continued expansion of its social media campaign aimed at leveraging this visitor satisfaction.



# Conclusions

- **After seeing increases in the proportion of visitors traveling with children over the past two years, this proportion appears to have stabilized in 2015.** Still, this group of visitors represents an attractive traveler cohort for the State of Maine and warrants targeted marketing focused on this group's travel priorities.
  - Specifically, visitors traveling with children tend to stay in Maine longer (one additional night, on average) and spend more money (approximately \$500 more for overnight visitors and \$100 more for day visitors) than their counterparts traveling *without* children. They are more likely to be visiting Maine for the first time and report higher levels of intent to visit again, suggesting that a strong potential exists for them to become future repeat visitors to the State.
  - In addition, visitors traveling with children are more likely to visit some of the less-visited regions in Maine, spreading tourism benefits to areas of the State in need of this additional visitation. Maine must continue to market the State as a family-friendly destination to maintain its attractiveness as a destination to these families traveling with children. Further exploration into the motivations, interests, and travel habits of this critical travel cohort is warranted.



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