

ORIGINAL

MAINE

Maine

Maine Office of Tourism

Canada Market Analysis Quantitative Survey Research Report

BVK

November 2016

ADVENTURE



Maine



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Background

- In discussions with the Maine Office of Tourism (MOT), a clear need was identified for a Canada-focused deep dive research investigation.
- Specifically, we need to ascertain underlying issues and identify any untapped opportunities in Eastern Canada, given the continued decline in visitation, the Canadian dollar exchange rate, and the historical contribution of Canada to the MOT's visitation.
- The outcome of this research needs to provide critical insights related to key issues that would guide future Canadian marcom efforts—for example, does it make sense to treat Canada like an in-state campaign; is more of a promotional versus ad strategy appropriate; where in Canada should MOT promote and why; and is it worth it to go all-in on French language translation (necessary for Quebec, Montreal, etc.)?



Research Objectives

- Gauge visitor volume from Canada and determine if it's likely to hold steady, increase, or decline in the near future
 - Quantify impact of exchange rate on visitation to Maine
- Fill in any holes/gaps in Canadian media habits that weren't covered in the 2014 Segmentation study
 - In Quebec, understand what proportion are predominantly French-speaking
- Understand the role advertising and promotions play in motivating past and future visitation
 - Confirm or deny a potential cultural nuance with Canadians observed in the prior qualitative phase—that they prefer to be directed on what to see/do in Maine vs. discover their own “Maine thing”
- For messaging purposes, prioritize the things to see/do that are likely to have the biggest impact driving future visitation
 - Understand the extent to which Canadian travelers would be interested in a two-nation vacation or Discover New England trip ideas



Methodology

- In concert with the MOT, BVK designed an online survey to address the research objectives.
- Eastern Canadian residents were sourced through Qualtrics which partners with many panel providers for robust sample sizes. Qualtrics furnished incentives to all respondents.
- To qualify for the study Canadian consumers met the following criteria:
 - Age 25-64
 - Mix of men and women
 - Trip decision-makers
 - Have taken at least one trip to the US in the past 2 years or plan to take a trip to the US in the next 12 months
 - Fall into one of Maine’s priority segments: “Balanced Achievers,” “Genuine Originals,” or “Social Sophisticates”
 - Reside in the eastern most provinces (Ontario, Quebec, New Brunswick, Nova Scotia, Prince Edward Island, and Newfoundland and Labrador)
- The survey was translated into French Canadian (Quebecois) and French verbatim responses were translated into English upon close of fielding.

Qualifying Rate*	Median Interview Length	Completed Surveys
36%	21 minutes	1,010

*Percent of respondents who qualified for our study upon completing screener questions and the segmentation algorithm.

Sampling

- Quotas were set by Province to ensure representativeness.
- Survey data were weighted by province to match the 2016 population distribution.

Province	2016 Population	2016 Pop. %	Desired Completes	Actual Completes	Actual Complete %
New Brunswick	756,800	3.1%	50	61	6.0%
Newfoundland and Labrador	530,100	2.1%	50	60	5.9%
Nova Scotia	949,500	3.8%	74	81	8.0%
Ontario	13,983,000	56.6%	511	490	48.5%
Prince Edward Island	148,600	0.6%	6	18	1.8%
Quebec	8,326,100	33.7%	309	300	29.7%
TOTAL	24,694,100	100.0%	1,000	1,010	100.0%

- Throughout this report, when results by Province are shown, results for Prince Edward Island by itself are not shown due to its small base size (fewer than 30 completed interviews). Rather, results from Prince Edward Island are rolled into the overall results along with the other Provinces.

Segment Membership

- During the first few days of fielding we captured segment membership for the first 1,176 people who entered the survey, regardless of whether they qualified. This allowed us to estimate segment sizes in the six Eastern Canadian provinces.
- Compared to the 2014 DPA study, in this survey, Social Sophisticates and Comfortable Pragmatists are more prevalent in the U.S. than in Eastern Canada. Whereas, Balanced Achievers, Obligated Traditionalists, and Ambivalent & Indifferent are more prevalent in Eastern Canada than in the U.S.
- That said, the total size of MOT's 3 priority segments, in aggregate, is statistically similar in both countries.

Segment	Segment Sizes in the U.S. (per 2014 DPA)	*	Segment Sizes in Eastern Canada	Completed Surveys	% of Respondents
Balanced Achievers	17%	<	26.4%	378	37.4%
Genuine Originals	23%		21.7%	349	34.6%
Social Sophisticates	23%	>	17.0%	283	28.0%
Comfortable Pragmatists	12%	>	2.7%	N/A	N/A
Obligated Traditionalists	22%	<	27.7%	N/A	N/A
Ambivalent & Indifferent	5%	<	7.4%	N/A	N/A
TOTAL				1,010	100%

Executive Summary



Snapshot: Perceptions and Brand Health

- Here is a summary of some key brand health metrics and perceptions of Maine among Eastern Canadians in Maine’s priority segments:

Destination Perceptions	Total n=1,010
Maine was recommended to respondent as a vacation destination	40%
Net Familiar with Maine (Somewhat or Very)	56%
Perceive Maine to be different from destinations in Canada	46%
Perceive Maine to be different from other destinations in New England	33%
Net Likely to visit in the next 2 years	23%
Have ever visited Maine	51%
Visited in the past 2 years	18%
Have recommended Maine as a destination to others	43%

- At least half are familiar with Maine or have ever visited Maine.
- Fewer than half have had Maine recommended to them or have themselves recommended Maine to others.
- Maine is perceived to be more different from Canada than it is from other New England states.
- This study shows (in the table on the left) that the intent to visit, by segment, hasn’t changed from what DPA reported in the 2014 Segmentation study.

Likely to Visit ME in next 2 years	2016 Results	2014 DPA Segmentation
Balanced Achievers	30%	29%
Genuine Originals	20%	23%
Social Sophisticates	18%	16%



Gauge Visitor Volume and the Impact of the Exchange Rate

- Nearly one-quarter (23%) of Eastern Canadian travelers in MOT's priority segments are likely to visit Maine in the next two years.
 - This is higher among Balanced Achievers (30%), past visitors to Maine (64%), residents of New Brunswick (67%), and residents of Nova Scotia (51%).
- But there is a lot of potential to tap: 9 in 10 Eastern Canadian travelers are very oriented to U.S. travel, saying they will visit the U.S. within the next year.
- Among past visitors who are likely to visit ME in the next two years; nearly two-thirds say they will visit as often as they have in the past, and one-fifth will visit more often.
 - Their reasons for continued/increased visitation include: it's a good destination/they like going to Maine, they visit frequently, it's beautiful, it's close to home, they like to shop there, there's still more for them to explore there, and to visit family or friends.
- For most Eastern Canadian travelers in MOT's priority segments the exchange rate is not a deterrent:
 - Only one-quarter say they're less likely to visit the U.S. or Maine due to the exchange rate – meaning three-quarters are likely to visit despite the exchange rate.
 - Only 1 in 6 say they only visit countries with favorable exchange rates while slightly more (1 in 5) say they *don't consider* the exchange rate when choosing a destination.
 - Half say they're more careful with their spending when the exchange rate is unfavorable.
 - With that said, the exchange rate is more of a deterrent in New Brunswick – they are significantly less likely to visit due to the exchange rate than other provinces.
 - For Balanced Achievers it plays a much stronger role in deciding what country to visit.



Understand the Role Advertising and Promotions Play in Motivating Visitation

- Slightly more than half (53.5%) of past visitors used some type of promotion on their most recent trip to Maine such as a discount (e.g., on lodging, dining, attractions/activities, coupon book, or a discount at a particular retailer/business).
 - Usage was particularly strong among Ontarians and Balanced Achievers.
- More than half (56%) of Eastern Canadian travelers in MOT's priority segments have been motivated to take a trip to any destination by a package deal – the top motivation by a statistically significant margin.
 - Other promotions that motivated a trip include: discounts on lodging or transportation – but equally as motivating were a review about the destination and an article or story about the destination.
 - Package deals have been particularly motivating for Social Sophisticates and those in Newfoundland and Labrador.
- More than half (59%) say they would be motivated to visit Maine in the future by a package deal (particularly Social Sophisticates) and equally as many would be motivated by a discount on lodging alone.
 - For those who would be motivated by a package deal it should include lodging at a minimum and one or more of the following: meals, drinks, an activity/attraction.
- While financial incentives rise to the top of the list, other factors that would motivate a trip to Maine include: a review online/in social media about Maine, an article or story online/in print/on TV about Maine, a commercial or advertisement for Maine, a commercial or ad for a particular activity/attraction, accommodation, or means of transportation in Maine.



Explore Potential Cultural Nuances Regarding Self-Directedness and Tradition/Nostalgia

- Based on the insights that emerged from the prior qualitative phase, our hypothesis was that Canadians may be less self-directed [than Americans] based on several comments heard in the focus groups.
- What we learned: overall Eastern Canadian travelers are equally as self-directed (want to learn about a destination on their own) as they are externally-directed (want to be directed or told what to see and do) when it comes to travel planning and destination discovery.
 - More than half of Eastern Canadian travelers place themselves in the middle of the scale for all statements related to externally-directed and self-directed travel planning and discovery.
 - Not surprisingly, past visitors are more self-directed than prospects by a significant margin.
 - Balanced Achievers are more externally-directed than the other segments.
- Our second hypothesis: re-analysis of the 2014 Segmentation study suggested that Eastern Canadians might favor more traditional/nostalgic destinations over new experiences/destinations.
- What we learned: given the multiple vacations (6.8) they've taken in the past 2 years, they do both – try new destinations and go back to old/traditional favorites.
 - Roughly half or more of Eastern Canadian travelers are in the middle of the scale when it comes to both repeating destinations (family traditions and nostalgia) and going places they've never been before.
 - However, past visitors favor maintaining traditions and taking vacations that are part of long held family traditions more than prospects.
 - Balanced Achievers favor maintaining traditions, visiting traditional destinations, going places that make them feel nostalgic, and going back to destinations they like more so than the other segments.

Prioritize Maine's Things to See/Do Based on Potential to Drive Visitation

The following combinations of two categories appeal to the broadest possible audience of between 60% and 68%:

- Scenic Byways + Beaches
- Scenic Byways + Shopping/Retail
- Beaches + Unique Maine Foods
- Towns/Villages + Unique Maine Foods
- Scenic Byways + Unique Maine Foods
- Scenic Byways + Family Fun
- History/Architecture + Beaches
- Shopping/Retail + Beaches

The same combinations, above, appeal to the broadest audience of prospects as well.

- The top interest areas (categories of Maine's things to see and do) for the sake of prioritizing messaging are:
 - Scenic Byways & Sightseeing, particularly:
 - Old Canada Road Scenic Byway, Bold Coast Scenic Byway, Coastal Maine Botanical Gardens, and Rangeley Lakes Scenic Byway
 - Beaches, particularly:
 - Old Orchard Beach, Ogunquit Beach, Higgins Beach
 - Unique Maine Foods, particularly:
 - Iconic Maine foods, Maine Foodie Tours, Chocolatiers
 - Towns & Villages, particularly:
 - Bar Harbor, Portland's waterfront
 - Shopping & Retail, particularly:
 - Kittery Shopping Outlets, Bangor Mall, The Maine Mall
- See slides 70-72 of this report for the interests that would be most effective in driving visitation for each segment, from each Province, and among prospects.



Explore Interest in Two-Nation Vacations and Discover New England Trip Ideas

- Nearly half of respondents visited areas outside of ME on their most recent trip to ME, especially MA, NH, NY, VT, QC, and NB.
 - Residents of Ontario and Nova Scotia were more likely than average to visit areas outside of ME during their most recent trip to ME.
- While fewer than one-quarter say they're likely to visit ME in the next two years, nearly half of respondents would be motivated to vacation in Maine by either:
 - A two-nation vacation that includes exploring NB and ME
 - Driving the corridor between Quebec and Bath
 - Exploring the Acadia regions of NB, QC, and ME
- Residents of Ontario and Quebec show the strongest interest in two-nation vacations.
- Balanced Achievers show more interest in two-nation vacations than the other two segments.
- Nearly two-thirds of respondents would be motivated to visit ME by a Discover New England road trip.
 - In particular, past visitors and Balanced Achievers show the strongest interest in a DNE road trip.



Understand Media Habits and Language Preferences

- A majority (85%) of Eastern Canadian travelers in MOT's priority segments regularly use the internet – statistically more than any other media channel.
 - Top sites visited include Google, TripAdvisor, CBC, Yahoo!, and CNN.
- More than half watch television and use social media sites.
 - Top social media sites visited include Facebook, Twitter, and Instagram.
- Fewer than half read the newspaper, approximately one-third read magazines, and fewer than one-third subscribe to Netflix.
 - Top newspapers read include Toronto Star, The Globe and Mail, La Presse/La Presse+, Le Journal de Montreal, and the National Post.
 - Top magazines read include Maclean's, National Geographic, People, Chatelaine, Canadian Living, and CAA Magazine.
- More than half of respondents speak English only at home, one in six respondents speak French only.
 - In Quebec, 41% speak French only while other provinces are 80% or more English speaking only.
- More than half of those who are French-speaking or who reside in French-speaking regions expect an English-speaking destination's materials to be in English and equally as many don't mind reading such materials in English because it helps them practice English before they travel.
- Just over one-third (39%) expect to see advertisements in French where they live but just as many (40%) don't feel strongly (are in the middle).
 - More Social Sophisticates expect to see ads in French where they live (48%).

Implications & Considerations





Content and Things to See/Do Spur Interest in a Maine Vacation

- Despite 56% of Eastern Canadian travelers feeling somewhat or very familiar with Maine and fully one-half having ever visited Maine for leisure purposes, only 23% say they're likely to visit in the next two years.
- When asked what types of content about Maine would motivate them to travel and when provided with specific examples of what Maine has to offer, motivation to visit jumped drastically.
- This suggests that despite strong familiarity, there's still a knowledge/content gap.
- From a content standpoint, the following types are likely to have the greatest impact on motivation to visit:
 - Top 10 list of things to see/do (would motivate 70% to visit)
 - Variety of itinerary suggestions including sights, activities/attractions, restaurants (would motivate 69% to visit)
 - Feedback from people who've visited before including reviews/blogs (would motivate 57% to visit)
- The specific interest categories to feature in the above types of content include scenic byways & sightseeing, beaches, unique Maine foods, towns & villages, and shopping and retail
 - We asked travelers about 16 interest categories, and of those, 15 categories were rated by 70% or more travelers as "nice to have" or "must have" for an ideal trip to Maine.
 - On average, travelers selected 4.6 interest categories as "must haves."



Two-Nation Vacations and DNE Trips Can Also Spur Interest in a Maine Vacation

- Partnerships/coops with neighboring provinces and other New England states through which mutually beneficial trip ideas and itineraries for two-nation and DNE trips do positively impact visitation. Maine will benefit from more visitors than would have otherwise come.
 - By itself, 23% of Eastern Canadians travelers say they'll visit Maine in the next two years. However Two-Nation Vacation trips ideas would motivate as many as 45%-50% to visit Maine:
 - 50% motivated by a two-nation trip exploring NB & ME
 - 48% motivated by a two-nation trip driving the corridor between QC and Bath
 - 45% motivated by a vacation exploring the Acadia regions of QC, NB, and ME
 - Similarly, Discover New England trip ideas would motivate nearly two-thirds (64%) of travelers to visit Maine.



Promotions and Discounts Would Spur Interest and Lengthen Stay

- While content alone may be enough to spur interest, package deals and discounts would help seal the deal (especially given the unfavorable exchange rate) and may lengthen their trip.
 - Types of promotions or discounts that would most impact motivation to visit:
 - A package deal inclusive of lodging, meals, drinks, an activity or attraction (would motivate 59% to visit)
 - A discount on lodging (would motivate 54% to visit)
- Further, package deals serve to lengthen the trip.
 - Past visitors report staying 3.7 nights on average.
 - Respondents who would be motivated by a package deal to visit say they would stay 4.8 nights, on average.
 - Travelers from Newfoundland and Labrador say they'd stay 5.5 nights, on average.



Canadians Are in the Middle on Tradition vs. New and on Self vs. External Directedness

- When it comes to seeking destinations that are traditional/nostalgic versus new destinations, Canadians are in the middle – they tend to do both. Some past visitors will continue to come back, but there are many out there seeking new experiences – examples of which should be included in MOT’s marcom.
- When it comes to being self-directed (wanting to discover and plan on their own) or being externally-directed (wanting the destination to tell them what to do), Canadians are again in the middle – roughly half don’t strongly agree or disagree with either but rather feel somewhat described by both.
 - This suggests that depending on segment, our “discover your Maine Thing” approach may need to be supported with more tangible suggestions than we have historically done in the U.S. that said, past visitors tend to be more self-directed.
 - For example, potential visitors will expect both an easily navigable website that allows them to research, discover, and plan (self-directed) as well as easy to consume content such as the top 10/iconic Maine sights and experiences, trip/itinerary suggestions, and reviews, feedback, or tips from past visitors (externally-directed).
- Even when it comes to the exchange rate, relatively few Canadians are on the extreme endpoints (strongly agreeing or disagreeing) that the exchange rate impacts their choice of destination or deters visitation. Many are careful about spending on their leisure trip; they do feel/notice the impact of the exchange rate but most aren’t deterred by it.



Target Balanced Achievers

- Of MOT's three priority segments, Balanced Achievers show the strongest interest in a Maine vacation in response to a variety of types of content:
 - Top 10 list, two-nation vacations, DNE, feedback/reviews from past visitors.
 - Of the 16 interest areas tested for their ability to drive motivation to visit, Balanced Achievers were more interested in 13 of them compared to one or both other segments.
- Balanced Achievers also have stronger familiarity with Maine than the other segments and more of them perceive it to be different from destinations in New England and Canada.
- However, they're also more sensitive to the exchange rate, so discounts on lodging and package deals will help them see the value in a Maine vacation.
- They're also more externally-directed than the other segments which means the website, marcom, and advertising should make it easy for them quickly pick up on the must-see things to see/do in Maine.
- Balanced Achievers are also the largest of MOT's three priority segments in Eastern Canada (26.4%) by this study's estimation.



Marcom Should Be Offered in French

- Not surprisingly, in Quebec it is recommended that collateral, advertising, and the website be translated into French Canadian for this audience. A strong portion of them (41%) speak French only and more than one-third expect materials in their market to be in French. In Quebec it's customary (and quite possibly legally mandated) for signs and advertising to show the French language first followed by English.

Detailed Findings



Travel Behavior

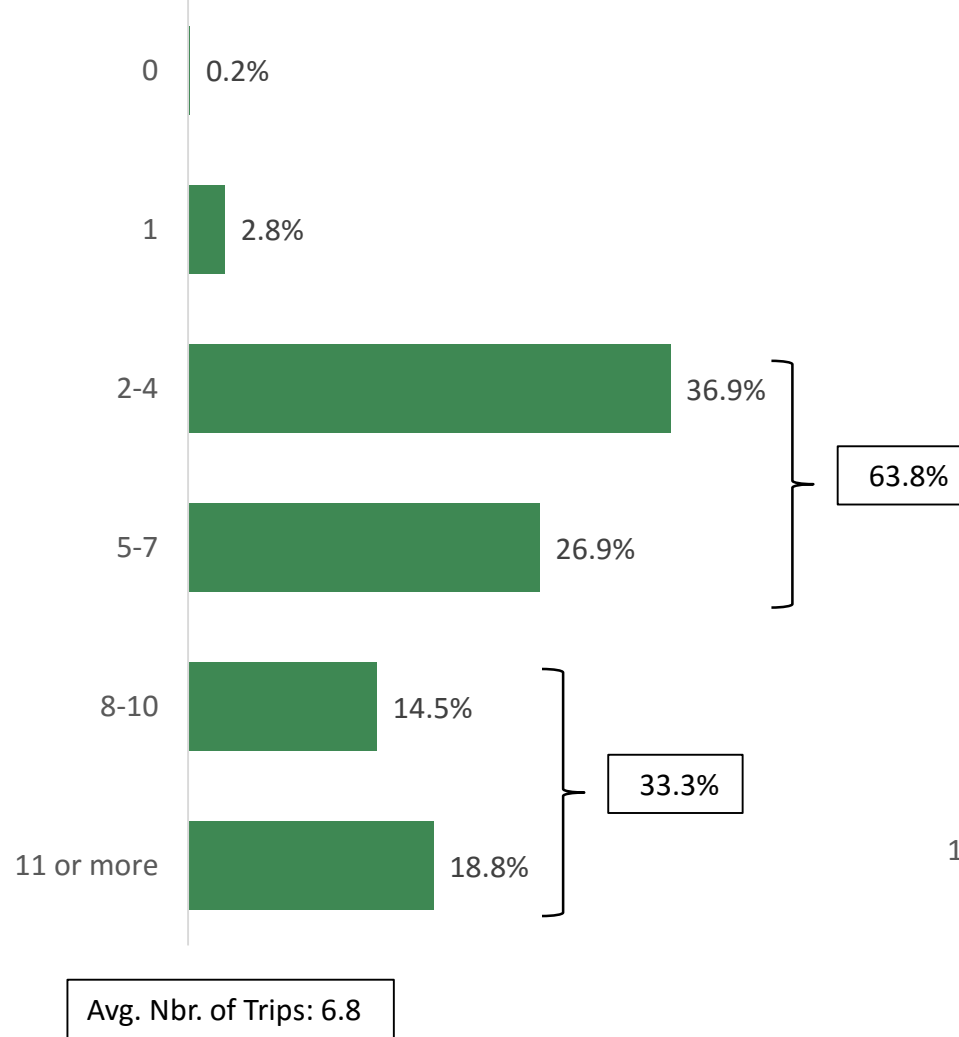


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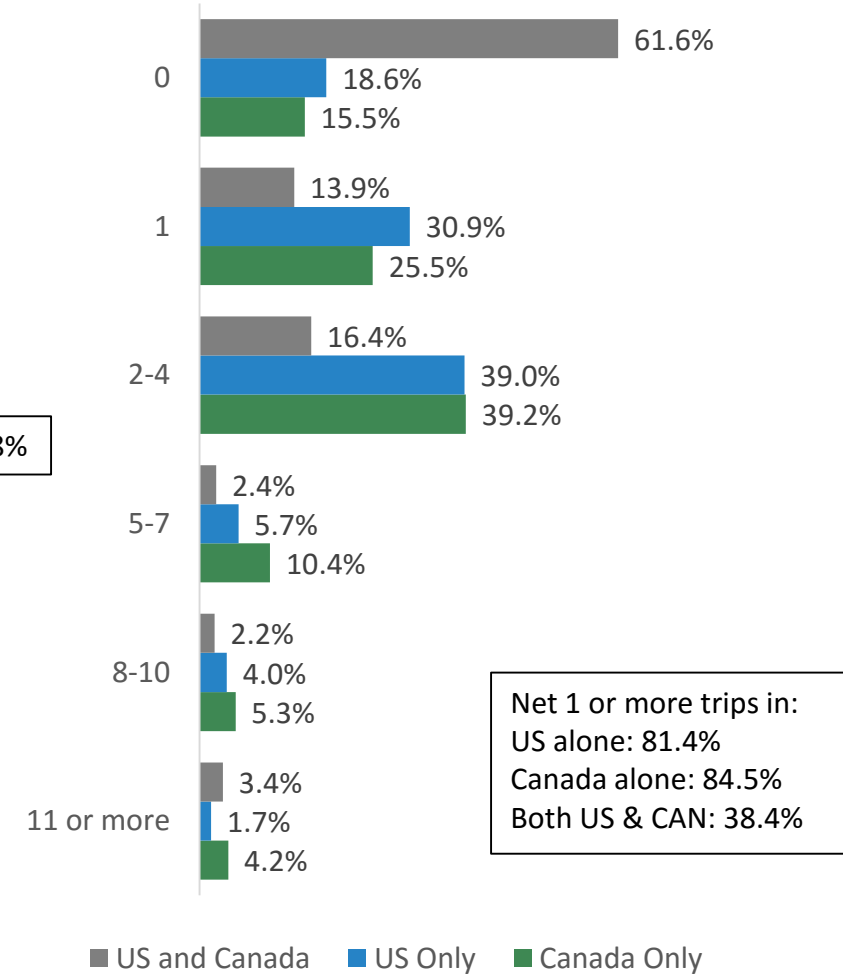
Recent Overnight Trips

- Eastern Canadians travelers in MOT's priority segments have taken an average of 6.8 trips in the past two years.
 - One-third have taken 8 or more trips in the past two years.
- More than one-third (38%) have taken a trip involving overnight stays in both Canada and the U.S. in the past 2 years.
 - 85% have taken 1 or more trips in Canada alone.
 - 81% have taken 1 or more trips in the U.S. alone.

Overnight Leisure Trips in Past Two Years



Overnight trips within US & Canada



T1. Over the past two years, how many overnight trips, if any, have you taken for leisure, vacation, or as a get-away to destinations that were 50 miles or more away from your home?
 Base: All Respondents, n=1,010

25 T2. Of the [T1] overnight leisure/vacation/get-away trips you took in the past two years, how many were within Canada and how many were in the U.S.?
 Base: All Respondents, n=1,010

Recent Overnight Trips by Segment

- Genuine Originals, on average, have taken more overnight trips in the past two years and more trips within Canada during that timeframe than the other priority segments.

Recent Overnight Trips	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Avg. Nbr. Overnight Trips in Past 2 Yrs.	6.2	7.9 AC	6.5
Avg. Nbr. Trips in US only	2.1	2.3	2.5
Avg. Nbr. Trips in Canada Only	2.6	3.9 AC	2.5
Avg. Nbr. Trips in Both US & Canada	1.5	1.6	1.1

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

T1. Over the past two years, how many overnight trips, if any, have you taken for leisure, vacation, or as a get-away to destinations that were 50 miles or more away from your home?
Base: All Respondents

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T2. Of the [T1] overnight leisure/vacation/get-away trips you took in the past two years, how many were within Canada and how many were in the U.S.?
Base: All Respondents

Maine

Recent Overnight Trips by Province

- Travelers in New Brunswick, NFL, and Nova Scotia take more trips, on average, than those in Quebec.
 - On average, more than half of their trips are in Canada only – significantly more than Ontarians and Quebecois.
- Those in New Brunswick and Ontario take more U.S.-only trips on average, than those in other provinces.

Recent Overnight Trips	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Avg. Nbr. Overnight Trips in Past 2 Yrs.	8.1 E	8.5 DE	8.4 DE	6.8	6.5
Avg. Nbr. Trips in US only	2.4 B	1.4	1.8	2.5 BCE	1.9
Avg. Nbr. Trips in Canada Only	4.4 DE	4.7 DE	4.9 DE	3.0 E	2.5
Avg. Nbr. Trips in Both US & Canada	1.2	1.3	1.9	1.4	1.4

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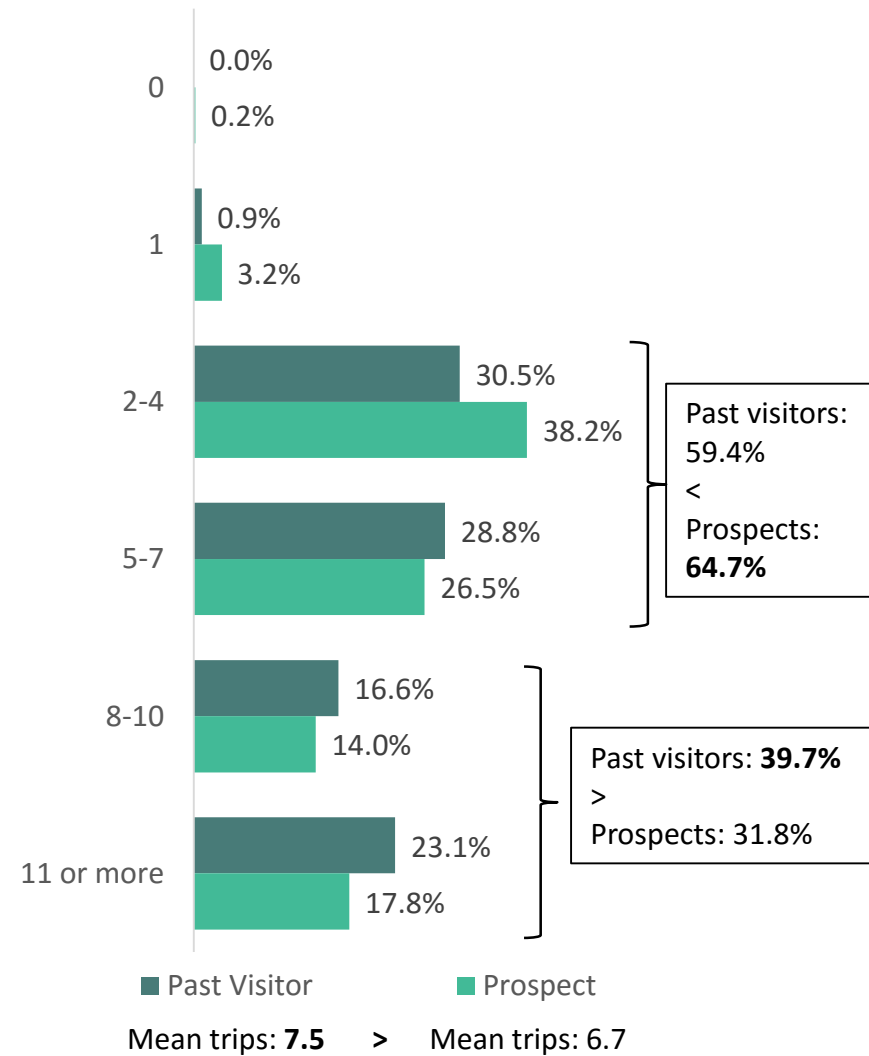
T1. Over the past two years, how many overnight trips, if any, have you taken for leisure, vacation, or as a get-away to destinations that were 50 miles or more away from your home?
Base: All Respondents

27 T2. Of the [T1] overnight leisure/vacation/get-away trips you took in the past two years, how many were within Canada and how many were in the U.S.?
Base: All Respondents

Recent Overnight Trips by Visitor Status

- Past visitors to Maine are more frequent travelers overall with 7.5 trips in the past two years compared to 6.7 among prospects.
- Past visitors have taken more trips, on average, that involved stays in both the U.S. and Canada than prospects (2.1 vs. 1.3).

Overnight Leisure Trips in Past Two Years



Overnight trips within US & Canada

Recent Trips	Past Visitors n=178 (A)	*	Prospects n=802 (B)
Avg. Nbr. Trips in US only	2.5		2.2
Avg. Nbr. Trips in Canada Only	3.2		3.0
Avg. Nbr. Trips in Both US & Canada	2.1	>	1.3

* < or > indicate statistically significant differences in between segments being compared

T1. Over the past two years, how many overnight trips, if any, have you taken for leisure, vacation, or as a get-away to destinations that were 50 miles or more away from your home? Base: All Respondents

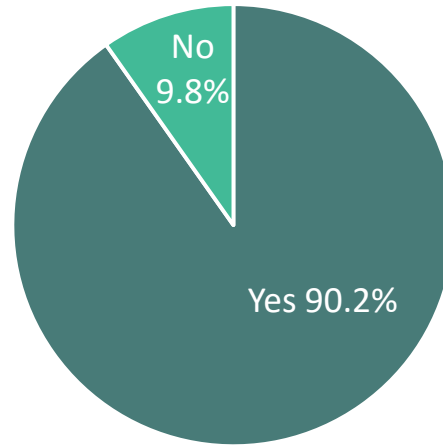
T2. Of the [T1] overnight leisure/vacation/get-away trips you took in the past two years, how many were within Canada and how many were in the U.S.? Base: All Respondents

Plan to Travel to the U.S. in the Next 12 Months

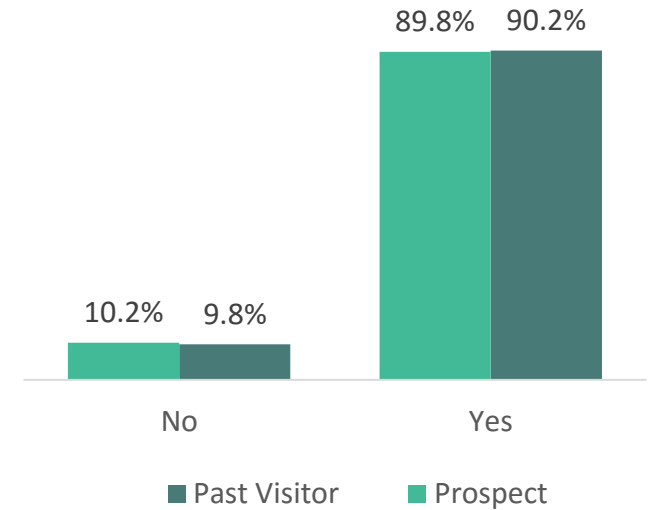
- A majority (90%) of Eastern Canadian travelers in MOT's priority segments plan to take an overnight trip in the U.S. in the next year.
- This is consistent across:
 - Past Visitors and Prospects
 - Provinces (not shown)
- More Balanced Achievers intend to travel to the U.S. in the next year than the other two priority segments.

Plan to Travel to the U.S. in the Next 12 Months

All Respondents



Past Visitors vs. Prospects



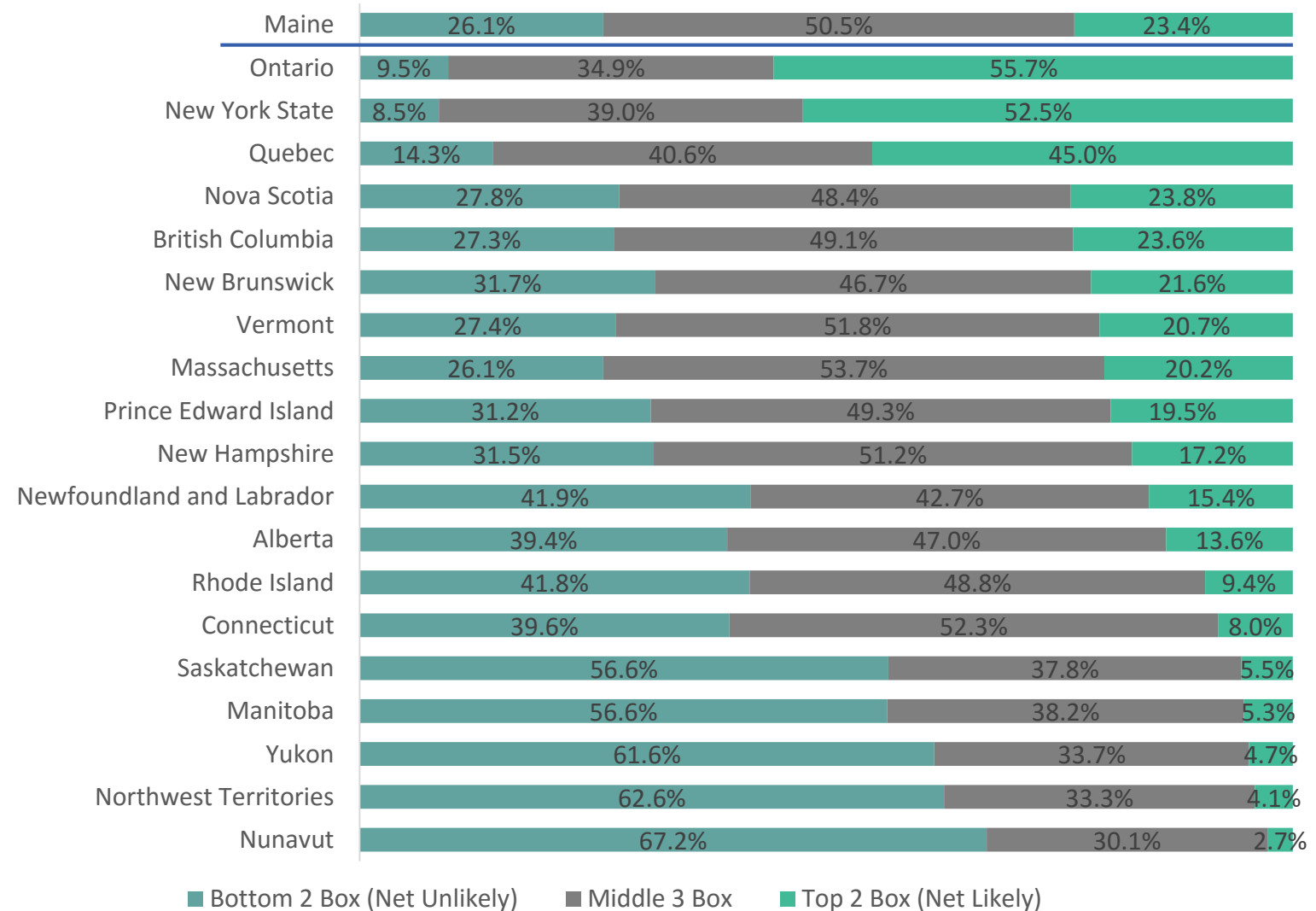
By Segment

Intend to Travel to the U.S.	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Yes	94.7% BC	87.6%	87.0%
No	5.3%	12.4% A	13.0% A

Visitation Likelihood by Destination

- Nearly one-quarter of Eastern Canadian travelers I MOT's priority segments are likely to visit Maine in the next two years.
- More than half are likely to visit Ontario and New York.
- Nearly one-half are likely to visit Quebec.

Leisure Travel Likelihood in the Next Two Years



More past visitors are net likely to visit ME in the next two years than prospects (64% vs. 15%).

Visitation Likelihood by Segment

- Significantly more Balanced Achievers are likely to visit nearly every destination measured than Social Sophisticates.

Net Likely to Visit (Top 2 Box)	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Canadian Destinations			
New Brunswick	27.2% BC	20.2%	15.3%
Nova Scotia	27.6% C	23.7%	18.5%
Prince Edward Island	22.6% C	20.3%	14.2%
Newfoundland and Labrador	19.8% C	14.9%	9.9%
Quebec	50.1% C	44.9%	38.0%
Ontario	56.6%	59.2% C	50.0%
British Columbia	31.6% BC	23.4% C	12.4%
Alberta	20.4% BC	9.8%	8.4%
U.S. Destinations			
Maine	30.1% BC	19.9%	17.9%
New Hampshire	23.0% BC	15.9%	10.6%
New York State	63.0% BC	46.8%	44.3%
Massachusetts	25.4% BC	19.1%	14.0%
Vermont	26.3% C	21.8% C	11.4%
Connecticut	14.5% BC	4.7%	2.7%
Rhode Island	18.4% BC	2.9%	4.3%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

T4. How likely are you to travel to the following destinations for a leisure trip/vacation/get-away in the next two years?

7-pt scale: 1- Extremely Unlikely 7 - Extremely Likely

Base: All Respondents

Visitation Likelihood by Province

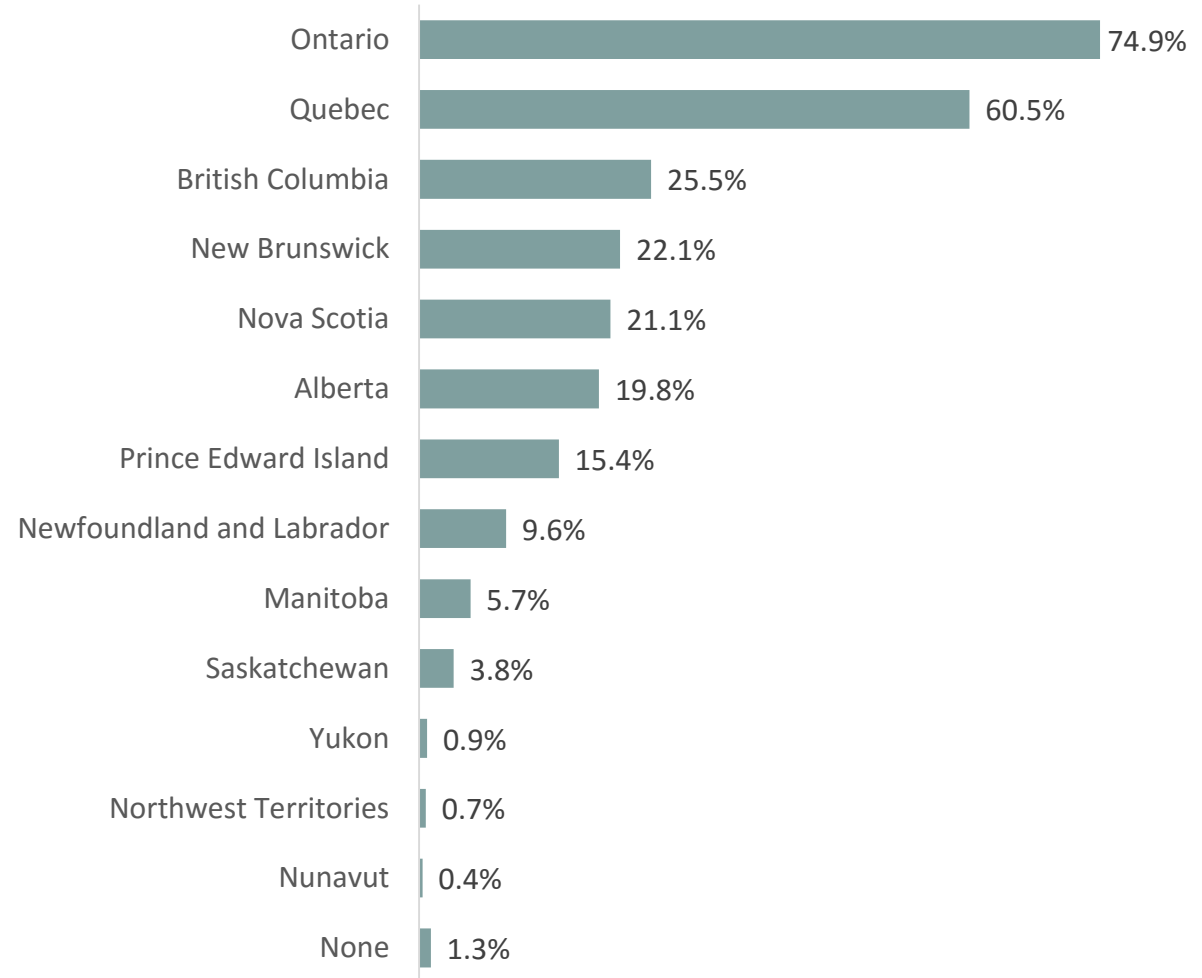
- Respondents in New Brunswick and Nova Scotia are significantly more likely to visit Maine than those in other provinces.
 - In NB, respondents are more likely to visit ME than all other U.S. states in the Northeast.
- Quebecois are more likely to visit ME than those in NFL and Ontario.
- Those in Quebec and Ontario are statistically more likely to visit NY than Maine.

Net Likely to Visit (Top 2 Box)	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Canadian Destinations					
New Brunswick	77.0% BCDE	16.7%	56.8% BDE	17.8%	18.3%
Nova Scotia	63.9% BDE	41.7% DE	77.8% BDE	23.9% E	11.3%
Prince Edward Island	50.8% BDE	18.3%	48.1% BDE	20.2% E	11.3%
Newfoundland and Labrador	16.4% E	71.7% ACDE	24.7% E	18.2% E	6.0%
Quebec	45.9% BC	20.0%	29.6%	37.6% B	61.0% ABCD
Ontario	32.8%	55.0% A	39.5%	64.3% ACE	45.3%
British Columbia	16.4%	10.0%	21.0%	30.0% ABE	15.0%
Alberta	11.5%	11.7%	16.0%	16.3% E	9.0%
U.S. Destinations					
Maine	67.2% BCDE	13.3%	50.6% BDE	15.3%	30.0% BD
New Hampshire	32.8% BDE	8.3%	44.4% BDE	13.1%	20.0% BD
New York State	27.9%	33.3%	34.6%	53.1% ABC	57.3% ABC
Massachusetts	21.3%	18.3%	22.2%	19.2%	21.7%
Vermont	13.1%	8.3%	11.1%	14.9%	33.3% ABCD
Connecticut	6.6%	5.0%	6.2%	7.6%	9.3%
Rhode Island	6.6%	8.3%	7.4%	10.4%	8.3%

Recent Visitation to Canadian Provinces

- Three-quarters of Eastern Canadian travelers in MOT's priority segments have visited Ontario in the past two years and 61% have visited Quebec.
- (*Note that 80% of respondents in this study live in one of these two provinces).
- One-quarter have visited British Columbia.

Leisure Visits to Canadian Provinces in the Past Two Years



Recent Visitation to Canada by Segment

- Fewer Social Sophisticates have recently visited Alberta than the other segments.
- More Genuine Originals have recently visited Nova Scotia than the other segments.

Recent Visitation to Canada	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Ontario	75.7%	77.4%	70.5%
Quebec	61.8%	59.8%	59.5%
British Columbia	28.4% C	26.2%	20.5%
Alberta	23.8% C	20.5% C	13.1%
New Brunswick	20.9%	24.9%	20.4%
Nova Scotia	17.6%	27.0% AC	18.7%
Prince Edward Island	15.3%	18.1%	12.1%
Newfoundland and Labrador	9.5%	12.5% C	6.1%
Manitoba	6.6%	4.9%	5.3%
Saskatchewan	3.3%	4.5%	3.7%
Yukon	1.3%	0.7%	0.5%
Northwest Territories	1.3%	0.4%	0.5%
Nunavut	0.3%	0.7%	0.0%
None	0.6%	1.7%	1.9%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

T5. In which Canadian provinces/territories have you visited for a leisure trip/vacation/get-away and stayed overnight during the past two years?

Base: Respondents who took a trip Canada in past two years



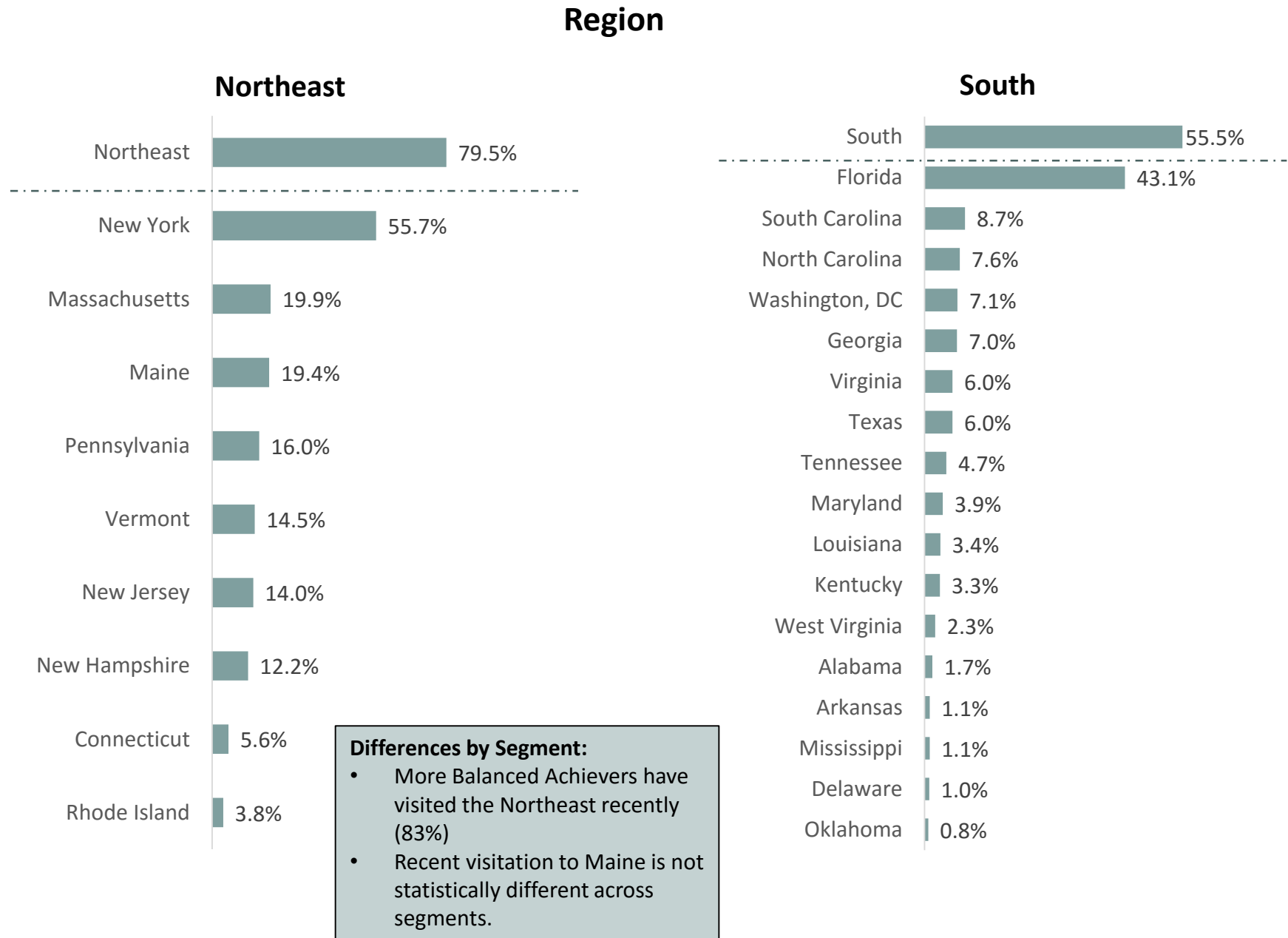
Recent Visitation to Canada by Province of Residence

- Residents of New Brunswick and Nova Scotia are more likely to have visited NB, NS, and PEI in the last two years than those living in other provinces.
 - Fewer Ontarians have visited New Brunswick than those living in the other Eastern Provinces.

Canadian Provinces Visited in Past 2 Years	New Brunswick n=58 (A)	NFL n=59 (B)	Nova Scotia n=80 (C)	Ontario n=452 (D)	Quebec n=267 (E)
Canadian Destinations:					
New Brunswick	84.5% BCDE	28.8% D	67.5% BDE	13.5%	23.6% D
Nova Scotia	72.4% BDE	50.8% DE	77.5% BDE	19.0% E	9.0%
Prince Edward Island	55.2% BDE	22.0%	55.0% BDE	12.2%	11.2%
Quebec	44.8%	33.9%	42.5%	53.3% B	79.0% ABCD
Ontario	39.7%	71.2% AC	47.5%	82.5% ACE	68.9% AC
Newfoundland and Labrador	13.8% E	76.3% ACDE	20.0% DE	9.3% E	3.7%
Alberta	12.1%	20.3%	15.0%	22.6% AE	16.1%
British Columbia	10.3%	8.5%	17.5%	32.1% ABCE	18.0% B
Manitoba	3.4%	1.7%	1.3%	7.5% BCE	3.4%

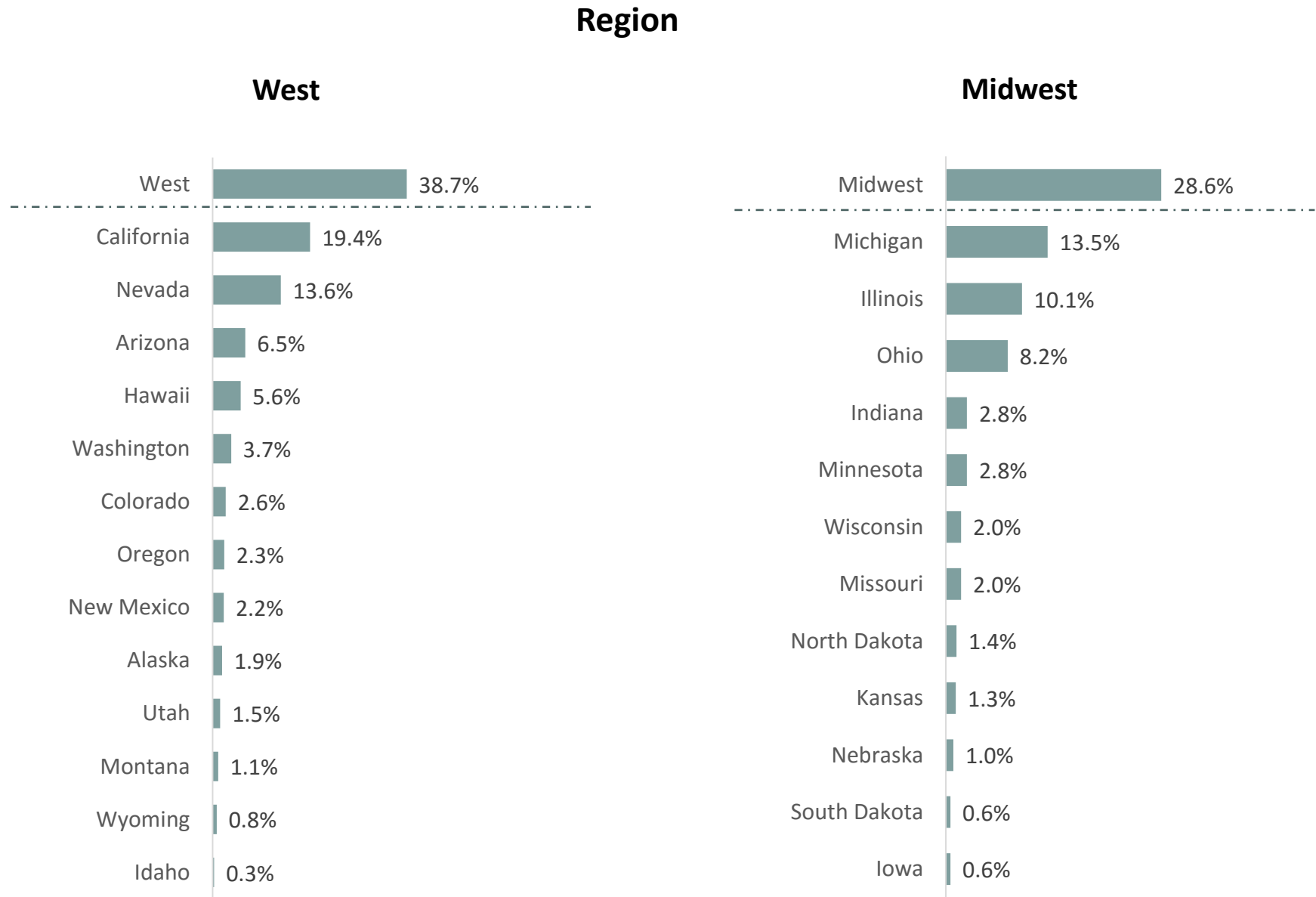
Recent Visitation to the U.S.

- A majority of Eastern Canadians in MOT's priority segments who've traveled to the U.S. in the past two years have visited the Northeastern U.S. (80%).
 - More than half have visited New York (56%).
- More than half have visited the Southern U.S. – the top destination being Florida (43%).



Recent Visitation to the U.S. (cont.)

- More than one-third of Eastern Canadians in MOT's priority segments have visited the Western U.S. – California and Nevada being the top destinations.
- More than one-quarter have visited the Midwestern U.S. – the top destinations being Michigan and Illinois.



Recent Visitation to the U.S. by Province

- Significantly more residents of New Brunswick and Nova Scotia have visited ME recently than those in other provinces.
 - Significantly more of them have visited ME than any other U.S. destination with the exception of FL.
- Among Quebecois, recent visitation to Maine was lower than NY; on par with FL, VT, MA, NJ, and NH; and higher than all other destinations.
- Top U.S. destinations among Ontarians were NY, FL, CA, MI, PA, MA, and NV.

	U.S. States Visited in Past 2 Years	New Brunswick n=51 (A)	NFL n=47 (B)	Nova Scotia n=67 (C)	Ontario n=451 (D)	Quebec n=270 (E)
U.S. Destinations:						
NORTHEAST	Maine	70.6% BDE	12.8%	59.7% BDE	8.6%	29.3% BD
	New York	35.3%	38.3%	32.8%	57.6% ABC	58.1% ABC
	Pennsylvania	5.9%	6.4%	4.5%	21.3% ABCE	9.6%
	Massachusetts	25.5% B	8.5%	29.9% BD	16.4%	25.2% BD
	New Jersey	3.9%	8.5%	3.0%	12.2%	19.6%
	Vermont	7.8%	6.4%	9.0%	8.0%	27.4% ABCD
	New Hampshire	33.3% BDE	6.4%	25.4% BD	7.1%	18.1% BD
	Connecticut	7.8%	0.0%	7.5%	5.8%	5.2%
SOUTH	Florida	47.1%	66.0% CDE	46.3%	43.5%	40.0%
	South Carolina	3.9%	4.3%	6.0%	10.6% AE	6.3%
	Washington, DC	2.0%	6.4%	9.0%	8.2% A	5.6%
MIDWEST	Michigan	2.0%	4.3%	0.0%	21.7% ABE	2.6%
	Illinois	2.0%	4.3%	7.5%	13.7% ABE	5.2%
	Ohio	2.0%	2.1%	1.5%	12.2% ABCE	3.0%
WEST	California	9.8%	8.5%	22.4% B	22.0% AB	16.3%
	Nevada	19.6%	17.0%	13.4%	14.6%	11.1%
	Arizona	5.9%	6.4%	7.5%	6.4%	6.7%
	Hawaii	5.9%	2.1%	11.9% BE	6.4%	3.7%

Past Visitors to Maine

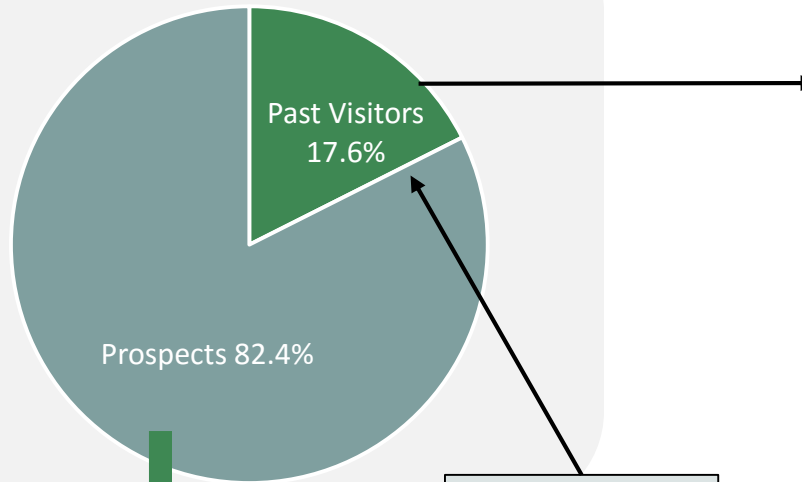


Maine

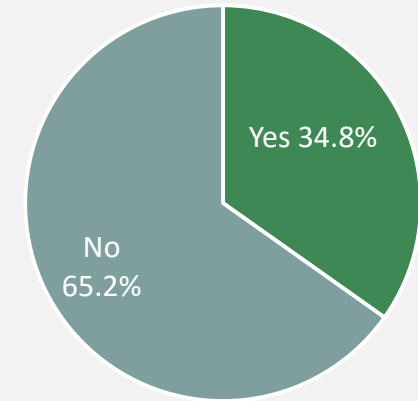
Past Visitors to Maine

- In total, half (51%) of respondents have ever visited Maine.
- Nearly one-fifth (18%) of Eastern Canadians in MOT's priority segments have visited Maine in the past 2 years (a.k.a. past visitors), and for two-thirds of them this was not their first trip.
- Among the remaining 82% (a.k.a. prospects), 40% have visited Maine more than 2 years ago.
- More than one-third of Eastern Canadians in MOT's priority segments who have visited Maine took one trip there in the past 5 years.
 - They've taken 1.6 trips to Maine, on average, in the past 5 years.

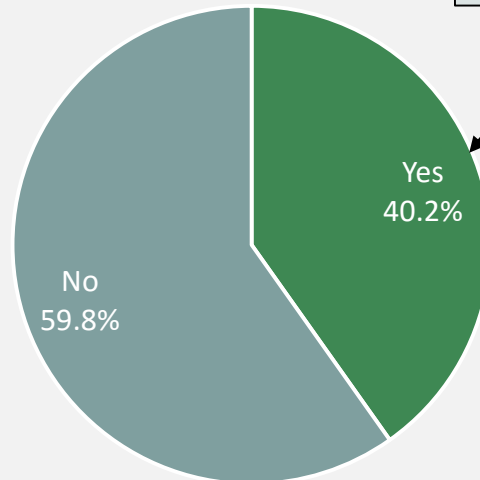
Past Visitors vs. Prospects



Past Visitors: Was This Your First Trip to ME?

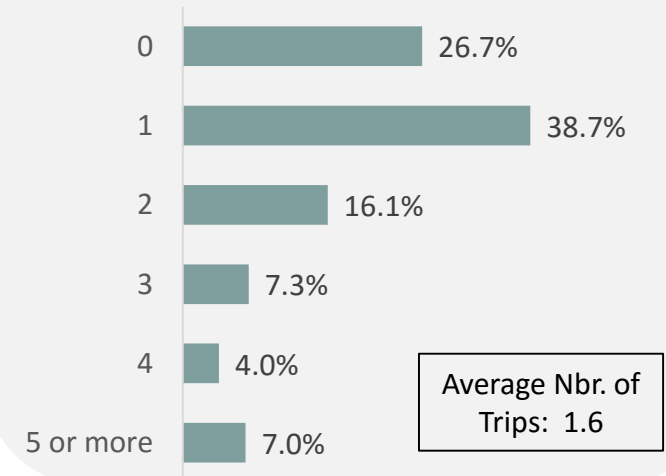


Ever Visited Maine



Overall 50.7% have ever been to Maine

Number of Leisure visits to Maine In the Past Five Years



QT6. In which U.S. state(s) have you visited for a leisure trip/vacation/get-away and stayed overnight during the past two years? – Maine

Base: All Respondents, n=1,010

T7. Have you ever been to Maine on a leisure trip/vacation/get-away? Base: Have not traveled to Maine in past 2 years, n=802

QV2. Thinking about your most recent leisure trip/vacation/get-away to Maine, was this your first leisure trip to Maine?

Base: Past Visitors n=208

V6. How many times, in total, have you visited Maine in the past 5 years for a leisure trip/vacation/get-away?

Base: Visited Maine/Past Visitor, n=546

Past Visitors to Maine by Province

- Past Visitors to Maine are over-represented in New Brunswick and Nova Scotia.
 - Prospects are over-represented in NFL, Ontario, and Quebec.
- Among prospects:
 - At least two-thirds in NB and NS have ever been to Maine
 - Half in Quebec have ever been to Maine
 - One-third in Ontario have ever been to Maine
- For more Ontarians this was their first trip to Maine.
- NB and NS averaged more trips to Maine in the past 5 years than other eastern provinces.

Past Visitor Behavior	New Brunswick (A)	NFL (B)	Nova Scotia (C)	Ontario (D)	Quebec (E)
Past Visitor Status	n=61	n=60	n=81	n=490	n=300
ME Past Visitor	59.0% BDE	10.0%	49.4% BDE	8.0%	26.3% BD
ME Prospect	41.0%	90.0% ACE	50.6%	92.0% ACE	73.7% AC
Past Visitors: What This Your First Trip to ME?	n=36	n=6	n=40	n=39	n=79
Yes	16.7%	+	12.5%	56.4% ACE	32.9% AC
No	83.3% DE	+	87.5% DE	43.6%	67.1% D
Prospects: Ever Visited to Maine?	n=25	n=54	n=41	n=451	n=221
Yes, have ever been to Maine	72.0%+	44.4%	68.3% BDE	32.6%	51.6% D
No, never been	28.0%+	55.6% C	31.7%	67.4% CE	48.4% C
Number of Times Visited Maine in Past 5 Years	n=54	n=30	n=68	n=186	n=193
0	5.6%	46.7% ACE	17.6% A	36.0% ACE	20.7% A
1	11.1%	33.3% A	22.1%	45.2% AC	38.9% AC
2 or more	61.1% BDE	13.3%	50.0% BDE	7.5%	18.7% D
Avg. Nbr. of Trips	4.2 BCDE	0.9	2.9 BDE	1.0	1.6 BD

QT6. In which U.S. state(s) have you visited for a leisure trip/vacation/get-away and stayed overnight during the past two years? – Maine
 Base: All Respondents
 T7. Have you ever been to Maine on a leisure trip/vacation/get-away? Base: Have not traveled to Maine in past 2 years
 QV2. Thinking about your most recent leisure trip/vacation/get-away to Maine, was this your first leisure trip to Maine? Base: Past Visitors
 V6. How many times, in total, have you visited Maine in the past 5 years for a leisure trip/vacation/get-away?
 Base: Visited Maine/Past Visitor

Motivations for Past Visitation

- Nearly half of past visitors to Maine were motivated to visit Maine due to its nature, beaches, oceans, or beautiful landscapes.
- Other motivating factors are its shopping and proximity.

Differences by Segment:

- Social Sophisticates were least motivated to visit by dining (1.1%).
- Balanced Achievers are least motivated by Maine's proximity (2.6%).

Motivations

Motivations for Visiting Maine	
Like to see nature/beaches/oceans/beautiful landscapes	47.5%
For shopping	16.3%
Close to me	10.7%
For adventure	9.3%
Good/like the place/like to go there	9.3%
For dining/to enjoy some good food	7.5%
On the way/passing through	6.6%
Good for rest/relaxing	5.8%
On vacation with family/friends	5.8%
Other activities/entertainment mentions	5.5%
Visit to family/friends	4.1%
Family/friends recommendations	3.9%
Other appeal mentions	3.5%
Business/job purpose	3.3%
Like to travel/explore more	3.1%

Motivations for Visiting Maine	
Like to see town/villages	2.9%
Economic/affordable	2.6%
Lobster festival	2.2%
Go there regularly/frequently/annually	2.1%
Go for summer vacations	2.0%
Good culture	2.0%
Like to see museums/historical places/park	1.8%
Vacation (unspecified)	1.8%
Good/friendly people	1.8%
Good atmosphere	1.3%
Family member likes to go there	1.3%
To see a concert	1.1%
Fun outing	0.8%
Other	9.0%

Motivations for Past Visitation to Maine by Province

- Past visitation to Maine was motivated primarily by shopping for those in New Brunswick and Nova Scotia.
- For Ontarians and Quebecois it was motivated by Maine's nature, beaches, the ocean, and beautiful landscapes.

Past Visitor Behavior	New Brunswick n=36 (A)	NFL n=6+ (B)	Nova Scotia n=40 (C)	Ontario n=39 (D)	Quebec n=79 (E)
For shopping	47.2% DE	+	55.0% DE	10.3%	2.5%
For adventure	16.7% C	+	2.5%	15.4% C	6.3%
Like to see nature/beach's/oceans/beautiful landscapes	19.4%	+	22.5%	43.6% AC	62.0% AC
Close to me	16.7%	+	10.0%	0.0%	15.2%
On the way/passing through	8.3%	+	15.0%	7.7%	3.8%
For dinning/to enjoy some good food	2.8%	+	5.0%	15.4% A	5.1%
On vacation with family/friends	13.9%	+	2.5%	7.7%	3.8%
Visit family/friends	2.8%	+	5.0%	7.7%	2.5%

+Caution: filtered base/small base size

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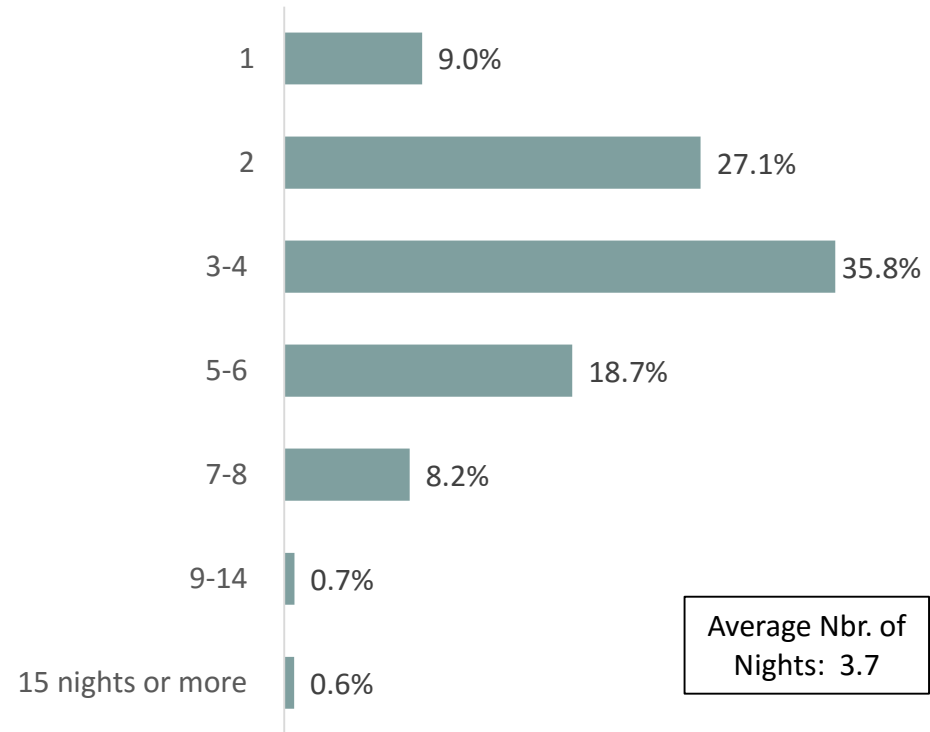
Length of Stay

- More than one-third of past visitors to Maine stayed 3-4 nights, and more than one-quarter (28%) stayed 5 or more nights.
- On average, past visitors to Maine from Eastern Canada (in MOT's priority segments) stayed for 3.7 nights.
- Quebecois stayed more nights, on average, than those in Nova Scotia and New Brunswick.

Differences by Segment:

- Social Sophisticates had a longer stay (4.1 nights, on average).

Number of Nights Spent in Maine

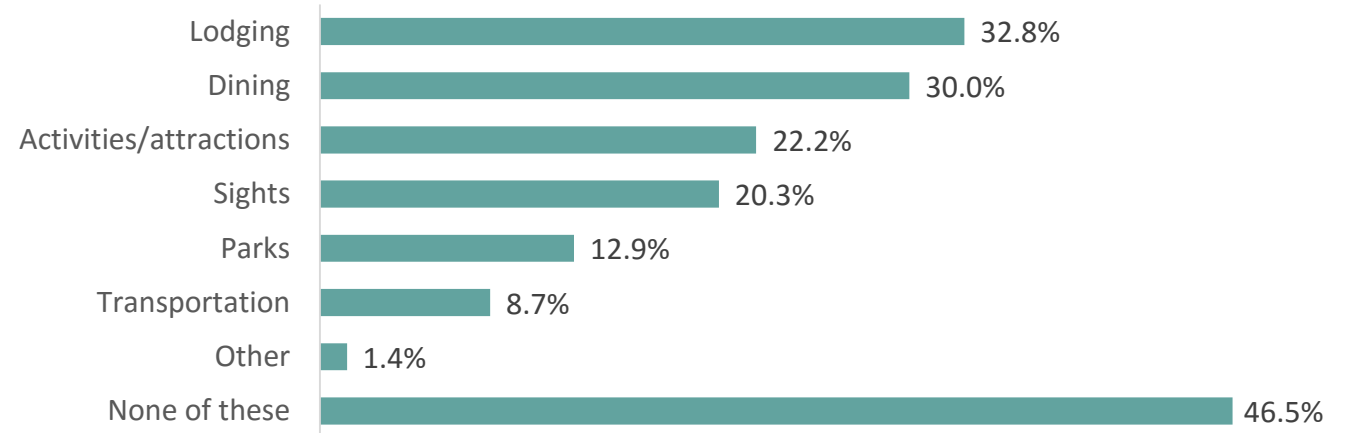


Number of Nights Spent in Maine	New Brunswick n=36 (A)	NFL n=6+ (B)	Nova Scotia n=40 (C)	Ontario n=39 (D)	Quebec n=79 (E)
1	8.3%	+	20.0% E	7.7%	6.3%
2	41.7% E	+	30.0%	28.2%	22.8%
3-4	33.3%	+	30.0%	30.8%	40.5%
5 or more	16.7%	+	20.0%	33.3%	30.4%
Average Nbr. of Nights	3.1	+	3.0	3.9 C	3.9 AC

Use of Promotions During Maine Trip

- Slightly more than half (53.5%) of past visitors to Maine used some type of promotion on their most recent trip to Maine.
- Top mentions include a promotion on lodging, dining, activities or attractions, and sightseeing.

Use of Promotions During Maine Trip



Description of Promotions	
DISCOUNT/COUPONS TYPE	57.0%
Accommodation/lodging/hotel discount	30.1%
Dinning/restaurant discount	15.8%
Other discount/coupons type mentions	15.0%
Attraction/activities discount/coupon	7.1%
Coupon book	4.4%
Museum coupons/discount	3.0%
Shopping coupons	1.0%
PROVIDERS	35.9%
Other provider mentions	14.6%
Online websites	10.2%
Tourism office	4.0%

Description of Promotions	
Employer/business	3.5%
Marriot hotel	2.3%
Stores/outlets	2.1%
MEDIUM	15.7%
Online	6.5%
Other medium mentions	4.7%
Email	3.5%
Magazine/newspaper	1.0%
Other	5.3%
NA/Nothing	18.4%
Don't Know	6.2%

V4a. On your most recent leisure trip/vacation/get-away to Maine did you use a coupon, promotion, discount/sale, or package deal at any time during your trip for any of the following? Base: (Have traveled to Maine in past 2 years), n=208

V4b. Please describe the coupon, promotion, discount/sale, or package deal you used during your most recent leisure trip/vacation/get-away to Maine—who offered it, what was it for/what did it include, what made it a good deal, where did you look for/find it, how did you receive it, etc.? Base: Any Promotion selected at QV4A, n=108

Use of Promotions During Maine Trip by Segment

- Balanced Achievers are more likely to have used a promotion on their most recent trip to Maine than other two priority segments.

Use of Promotions During Maine Trip	Balanced Achievers n=82 (A)	Genuine Originals n=73 (B)	Social Sophisticates n=53 (C)
NET Used Any Promotion	70.8% BC	43.0%	37.6%
Dining	44.6% BC	17.8%	20.0%
Lodging	41.6%	26.4%	25.7%
Sights	39.4% BC	6.9%	3.8%
Activities/attractions	36.8% BC	10.5%	11.6%
Parks	24.0% BC	4.9%	3.8%
Transportation	16.9% C	0.0%	5.3%
None of these	29.2%	57.0% A	62.4% A

Use of Promotions During Maine Trip by Province

- On their most recent trip to Maine, Ontarians are most likely to have used a transportation promotion.
- Both Ontarians and Quebecois were likely to have used a promotion on sights in Maine.

Use of Promotions During Maine Trip	New Brunswick n=36 (A)	NFL n=6+ (B)	Nova Scotia n=40 (C)	Ontario n=39 (D)	Quebec n=79 (E)
Lodging	33.3%	+	30.0%	33.3%	32.9%
Dining	27.8%	+	20.0%	43.6% C	26.6%
Activities/attractions	16.7%	+	12.5%	30.8% C	21.5%
Parks	13.9%	+	5.0%	15.4%	13.9%
Sights	5.6%	+	7.5%	28.2% AC	22.8% AC
Transportation	2.8%	+	5.0%	25.6% ACE	2.5%
None of these	47.2%	+	55.0% D	30.8%	51.9% D

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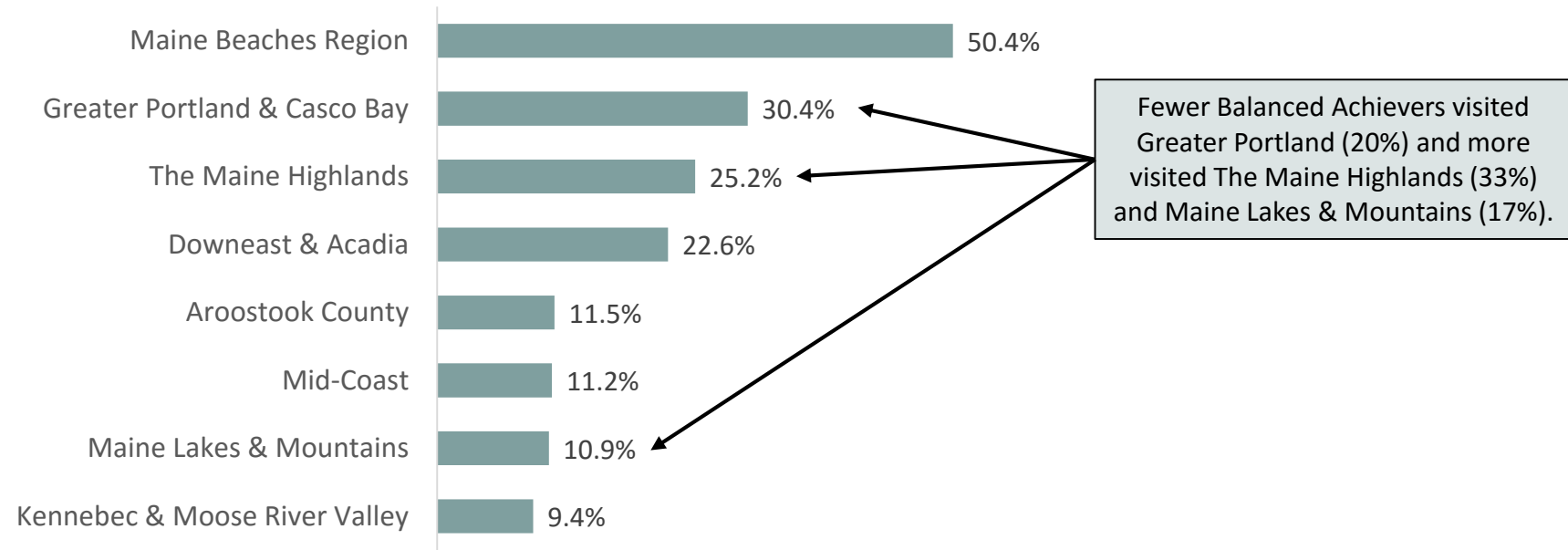
V4a. On your most recent leisure trip/vacation/get-away to Maine did you use a coupon, promotion, discount/sale, or package deal at any time during your trip for any of the following?

Base: (Have traveled to Maine in past 2 years)

Regions of Maine Visited

- One-half of past visitors from Eastern Canada (in MOT's priority segments) have visited the Maine Beaches Region.
- Nearly one-third have visited Greater Portland & Casco Bay; one-quarter visited the Maine Highlands; and slightly more than one-fifth visited Downeast & Acadia.
- Visitors from Nova Scotia are more likely to visit 5 out of 8 of Maine's regions than visitors from Quebec.
 - Quebecois are more likely to visit Maine's Beaches than those from other provinces.

Regions of Maine Visited on Leisure Trip

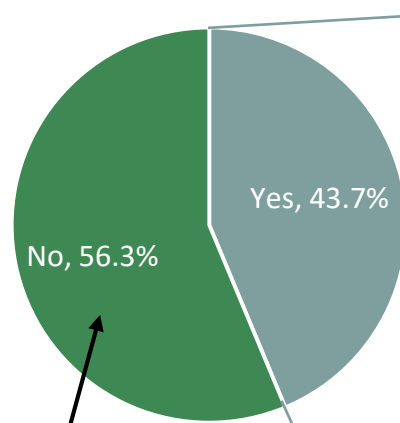


Regions of Maine Visited	New Brunswick n=36 (A)	NFL n=6+ (B)	Nova Scotia n=40 (C)	Ontario n=39 (D)	Quebec n=79 (E)
The Maine Highlands	44.4% E	+	50.0% E	30.8% E	12.7%
Greater Portland & Casco Bay	44.4%	+	42.5%	25.6%	26.6%
Downeast & Acadia	41.7% E	+	37.5% E	33.3% E	8.9%
Maine Beaches Region	27.8%	+	42.5%	33.3%	65.8% ACD
Aroostook County	13.9%	+	25.0% E	17.9%	5.1%
Kennebec & Moose River Valley	13.9%	+	20.0% E	12.8%	3.8%
Mid-Coast	5.6%	+	25.0% AE	17.9%	5.1%
Maine Lakes & Mountains	2.8%	+	12.5%	20.5% A	7.6%

Visited Areas Outside of Maine

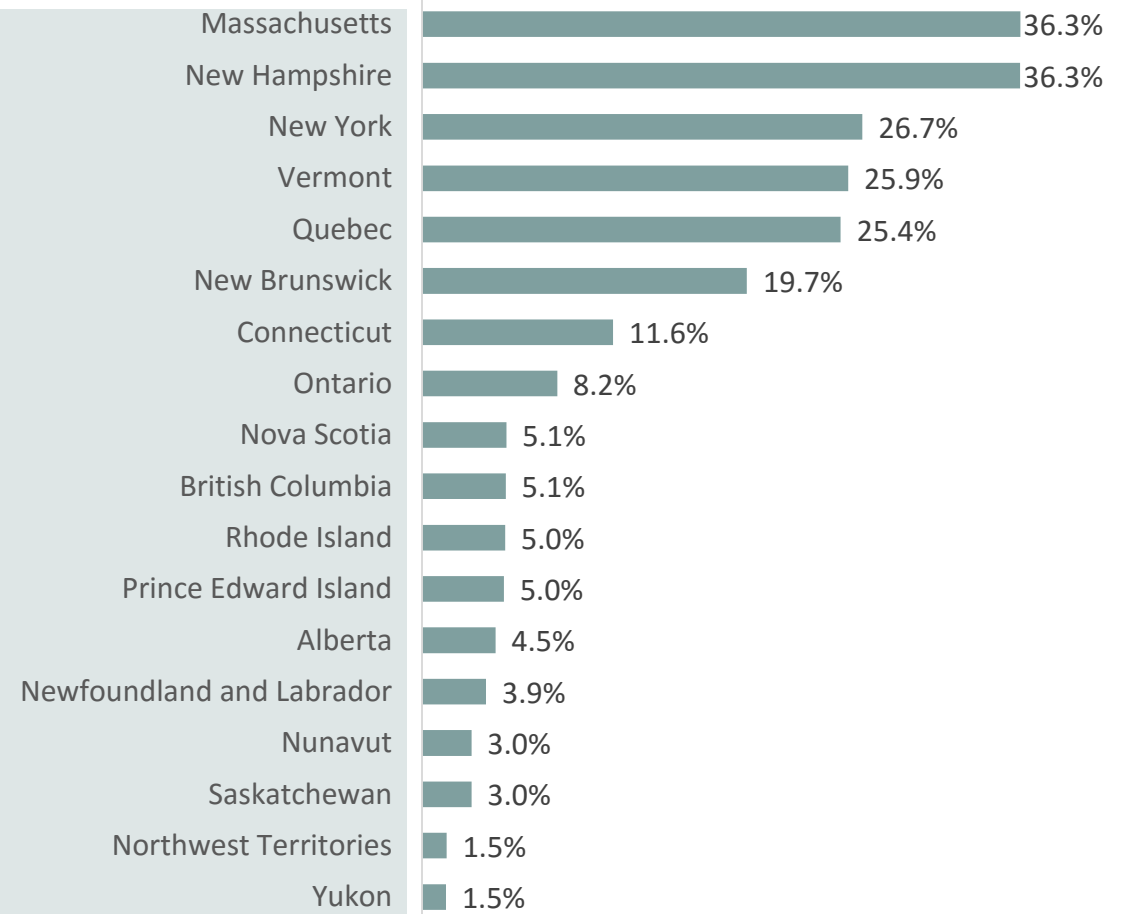
- Fewer than half of past visitors to Maine (44%) visited areas outside of Maine during their most recent trip.
- The top states visited by at least one-quarter of respondents are: MA, NH, NY, VT, or Quebec.
- More visitors from Nova Scotia and Ontario visited areas outside of Maine than those from New Brunswick.

Visited Regions Outside Maine



Social Sophisticates were least likely to visit areas outside of Maine (71%).

States/Provinces Visited Outside of Maine



	New Brunswick n=36 (A)	NFL n=6+ (B)	Nova Scotia n=40 (C)	Ontario n=39 (D)	Quebec n=79 (E)
Visited Areas Outside of Maine					
Yes	27.8%	+	50.0% A	53.8% A	40.5%
No	72.2% CD	+	50.0%	46.2%	59.5%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

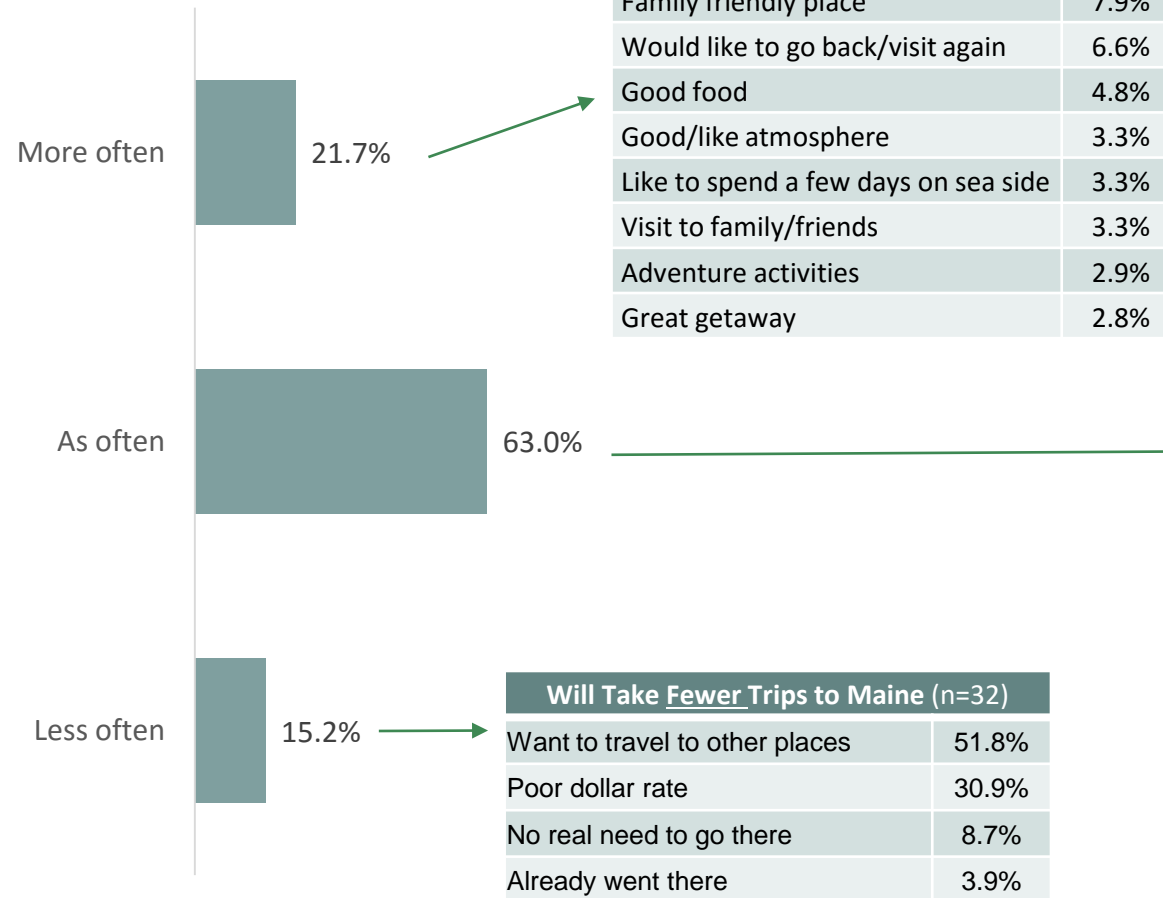
49 V9. During your most recent leisure trip/vacation/get-away to Maine, did you visit any areas outside of Maine? Base: Have traveled to Maine in past 2 years, n=208

V10. During your most recent leisure trip/vacation/get-away to Maine, where did you visit outside of Maine? Base: Visited outside of Maine, n=89

Intended Frequency of Future Visits to Maine

- One in five past visitors to Maine say they will take more trips in the future because they like going there, it's beautiful, there's still more to explore, to shop, and it's close to home.
- Nearly two-thirds say they will take as many trips because they go regularly, they like the destination, it's close to home, or they visit friends or family there.
- One in six say they will visit less often because they've already been and want to see other places or because of the exchange rate.

Intended Frequency of Visiting Maine in the Next Two Years



Will Take <u>More</u> Trips to Maine (n=37)	
Good place/like to go there	15.6%
Beautiful place	11.3%
There's more to explore	11.3%
Enjoyable/enjoyed there	9.8%
For shopping	9.3%
Close to me	9.0%
Family friendly place	7.9%
Would like to go back/visit again	6.6%
Good food	4.8%
Good/like atmosphere	3.3%
Like to spend a few days on sea side	3.3%
Visit to family/friends	3.3%
Adventure activities	2.9%
Great getaway	2.8%

Will Take <u>Fewer</u> Trips to Maine (n=32)	
Want to travel to other places	51.8%
Poor dollar rate	30.9%
No real need to go there	8.7%
Already went there	3.9%

Differences by Segment:

- More Balanced Achievers anticipate visiting Maine more often in the future (30%).

Will Take <u>As Many</u> Trips to Maine (n=122)	
Go there regularly/frequently/annually	17.8%
Good place/like to go there	14.8%
Close to me	10.3%
Visit to family/friends	7.4%
Enjoyable/enjoyed there	6.1%
For shopping	6.1%
Family friendly place	5.0%
More to explore	4.6%
Beautiful place	4.5%
Would like to go back/visit again	3.7%
Like to spend a few days on sea side	3.4%
On the way/passing through	3.2%
Other activities/entertainment mentions	2.2%
Go there regularly/frequently/annually	17.8%

V11. Earlier you said that you are to visit Maine in the next two years. Do you anticipate visiting Maine as often in the next two years, less often, or more often than you have in the last two years? Base: Past Visitor and likely to visit Maine in next two years, n=191

V12. What makes you say you'll take [PER V11 RESPONSE: "more trips" or "the same number of trips" or "fewer trips"] to Maine in the next two years? Base: Past Visitor and likely to visit Maine in next two years, n=191

Intended Frequency of Future Visits to ME by Province

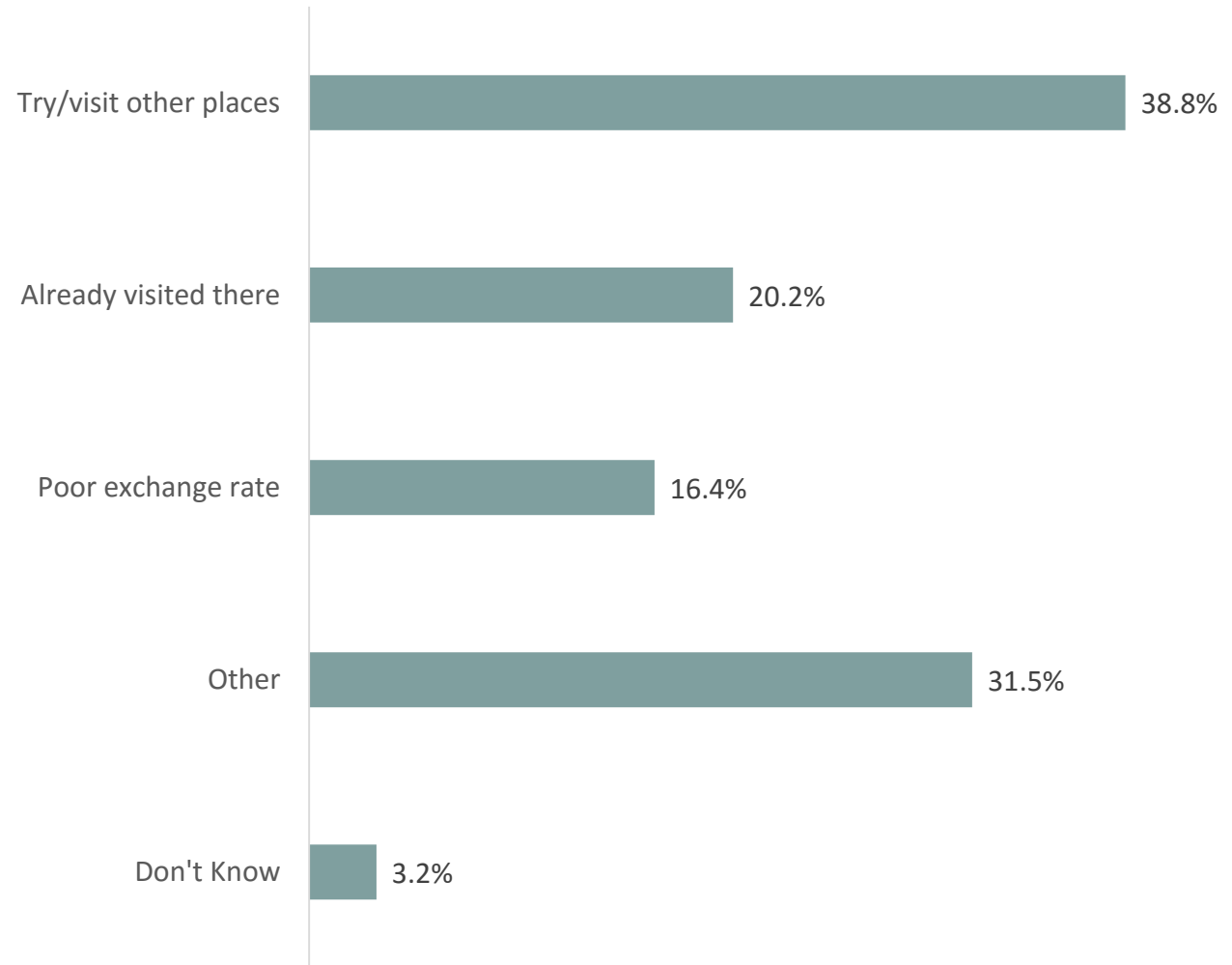
- Significantly more Ontarians say they'll visit Maine more often than those in New Brunswick and Nova Scotia.
- There are no other differences in future frequency of visiting Maine (as often or less often) by province.

Frequency of Future Visits	New Brunswick n=35 (A)	NFL n=5+ (B)	Nova Scotia n=37 (C)	Ontario n=36 (D)	Quebec n=70 (E)
More often	8.6%	+	16.2%	36.1% AC	18.6%
As often	65.7%	+	64.9%	52.8%	67.1%
Less often	25.7%	+	18.9%	11.1%	14.3%

Unlikely to Visit Maine in the Next 2 Years

- Very few past visitors (9%) said they are unlikely to visit Maine in the next two years.
- Top reasons for not visiting again include:
 - They want to visit other destinations, they don't repeat destinations, and the exchange rate is unfavorable.

***Reasons Unlikely to Visit Maine in the Next Two Years**

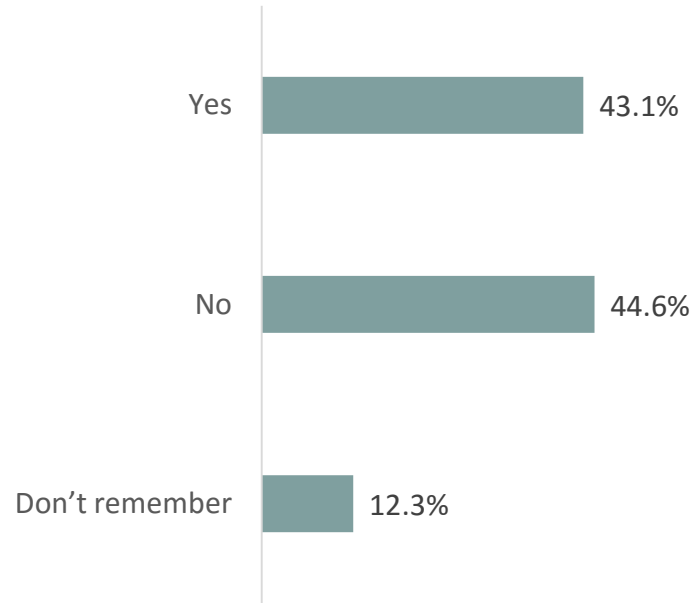


*Caution: small base; n=17

Maine Recommendation

- Fewer than half of all respondents (43%) have recommended Maine as a destination to others.
 - Among past visitors, a majority (80%) have recommended Maine to others.
 - Naturally, past visitors are significantly more likely to recommend Maine than prospects.
- More than one-third (40%) of all respondents have received a recommendation to visit Maine from others.
 - More than half (54%) of past visitors have received a recommendation.
 - Past visitors are significantly more likely to have received a recommendation than prospects.

Respondent Recommended Maine as a Leisure Destination to Others

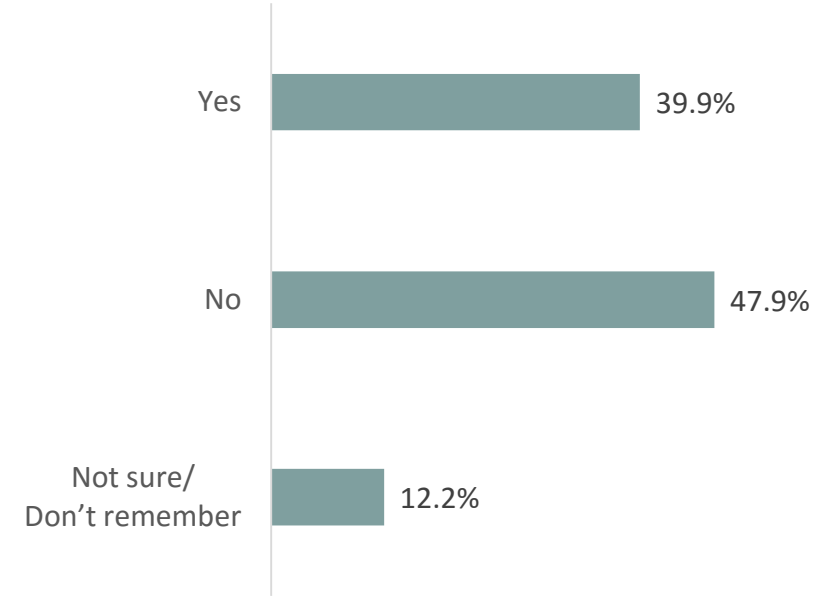


	Past Visitor	*	Prospect
Yes	80.3%	>	35.2%
No	12.5%	<	51.5%
Don't remember	7.2%	<	13.3%

Differences by Segment:

- More Balanced Achievers have recommended Maine to others than other segments have (50%).

Maine was Recommended as a Leisure Destination to Respondent by Others



	Past Visitor	*	Prospect
Yes	54.3%	>	38.8%
No	35.0%	<	50.7%
Don't remember	10.7%		12.5%

Differences by Segment:

- More Balanced Achievers have had Maine recommended to them than other segments have (45%).

Maine Recommendation by Province

- In NB, NS, and QC respondents are more likely to have recommended Maine as a leisure destination to others than those in NFL and ON.
- Respondents in NS and QC are more likely to have had Maine recommended to them than those in Ontario.

Respondent Recommended Maine as a Leisure Destination to Others	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Yes	67.2% BD	41.7%	66.7% BD	32.7%	55.3% D
No	19.7%	46.7% ACE	24.7%	55.1% ACE	32.0% A
Don't Remember	13.1%	11.7%	8.6%	12.2%	12.7%

Maine was Recommended as a Leisure Destination to Respondent by Others	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Yes	42.6%	36.7%	46.9% D	34.7%	47.3% D
No	42.6%	53.3%	40.7%	53.5% CE	40.0%
Not sure/don't remember	14.8%	10.0%	12.3%	11.8%	12.7%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

54 V14. Have you ever recommended Maine as a leisure/vacation/get-away destination to friends or relatives? Base: All Respondents

A7. Has anyone ever recommended Maine as a leisure trip/vacation/get-away destination to you? Base: All Respondents

Decision-Making, Familiarity, and Perceptions of Maine



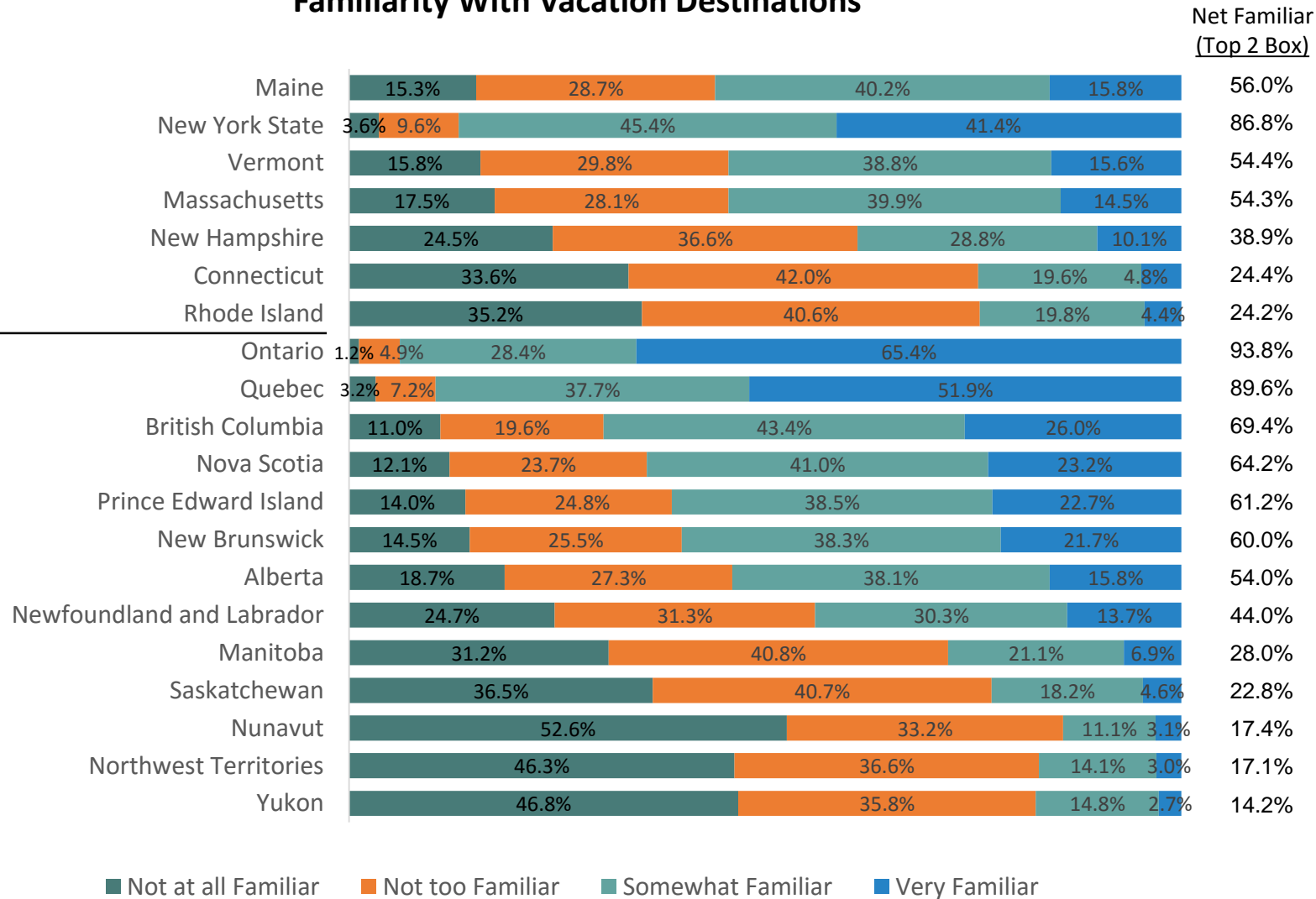
Maine

Destination Familiarity

- One in six Eastern Canadian travelers in MOT's priority segments consider themselves "very" familiar with Maine. More than half (56%) consider themselves net familiar (either "somewhat" or "very" familiar) with it.
- Eastern Canadian travelers in MOT's priority segments are statistically more familiar with Ontario (net 94%), Quebec (net 90%), New York (net 87%), British Columbia (net 69%), and Nova Scotia (net 64%) than with Maine.
- Familiarity with Maine is at parity with Prince Edward Island (net 61%), New Brunswick (net 60%), and Alberta (net 54%).



Familiarity With Vacation Destinations



Differences by Segment:

- More Balanced Achievers are net familiar with Maine (62%) than the other segments.
- Approximately half of Genuine Originals (46%) and Social Sophisticates (50%) say they are net unfamiliar with Maine.

Destination Familiarity by Province

- Familiarity with what Maine has to offer as a destination is highest among residents of NB and NS.
 - Other provinces are more familiar with NY than ME.
- Quebecois are more familiar with VT than those in other provinces.
- Residents of the Maritime Provinces tend to be more familiar with those provinces than residents of Quebec or Ontario.

	Net Familiar (Top 2 Box) With Each Destination	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
CANADA	Ontario	88.5%	93.3%	85.2%	99.2% ACE	86.3%
	Quebec	90.2% BC	61.7%	71.6%	87.6% BC	97.0% BCD
	British Columbia	49.2%	58.3%	46.9%	77.6% ABCE	61.0% C
	Nova Scotia	95.1% DE	93.3% DE	97.5% DE	68.8% E	47.3%
	Prince Edward Island	95.1% BDE	75.0% DE	93.8% BDE	62.7% E	50.3%
	Alberta	49.2%	65.0% E	49.4%	61.8% CE	40.7%
	New Brunswick	98.4% BDE	68.3% D	93.8% BDE	54.5%	60.7%
	Newfoundland and Labrador	63.9% DE	100.0% ACDE	74.1% DE	49.2% E	26.0%
	Manitoba	19.7%	26.7%	16.0%	34.5%	19.3%
	Saskatchewan	19.7%	16.7%	24.7%	25.5% ACE	18.7%
	Yukon	14.8%	18.3%	14.8%	21.8% E	10.7%
	Northwest Territories	11.5%	18.3%	12.3%	20.6% E	12.0%
Northeast U.S.	Nunavut	14.8%	18.3%	13.6%	16.7% E	9.7%
	New York State	68.9%	85.0% AC	69.1%	89.6% AC	86.0% AC
	Vermont	44.3%	33.3%	46.9%	48.2% B	68.3% ABCD
	Maine	86.9% BDE	58.3%	84.0% BDE	46.5%	65.3% D
	New Hampshire	65.6% BDE	35.0%	64.2% BDE	33.1%	43.3% D
	Massachusetts	52.5%	58.3%	55.6%	54.7%	53.3%
Connecticut	31.1%	31.7%	22.2%	25.1%	22.7%	
Rhode Island	24.6%	25.0%	17.3%	24.5%	24.7%	

Destination Familiarity by Visitor Status

- As expected, statistically more Maine past visitors are familiar with what Maine offers as a destination than prospects.
- Maine past visitors are also more familiar with PEI, NB, VT, NH, MA, and CT.

	Net Familiar (Top 2 Box) With Each Destination	Past Visitor n=208	*	Prospect n=802
CANADA	Ontario	90.6%		94.5%
	Quebec	89.6%		89.5%
	British Columbia	60.4%	<	71.3%
	Nova Scotia	65.4%		63.9%
	Prince Edward Island	70.8%	>	59.1%
	Alberta	47.7%		55.3%
	New Brunswick	75.0%	>	56.8%
	Newfoundland and Labrador	46.5%		43.5%
	Manitoba	26.8%		28.2%
	Saskatchewan	24.2%		22.5%
	Yukon	16.0%		17.8%
	Northwest Territories	15.6%		17.4%
Nunavut	15.7%		13.9%	
Northeast U.S.	New York State	82.7%		87.7%
	Vermont	65.8%	>	51.9%
	Maine	93.5%	>	48.0%
	New Hampshire	59.4%	>	34.5%
	Massachusetts	62.7%	>	52.6%
	Connecticut	32.3%	>	22.8%
	Rhode Island	28.8%		23.3%

Note that 80% of respondents in the study live in either Ontario or Quebec.

* < or > indicate statistically significant differences in between segments being compared

A1. How familiar are you, overall, with what the following places offer to see and do as vacation destinations?

4-pt scale: 1- Not at all Familiar 4 – Very Familiar

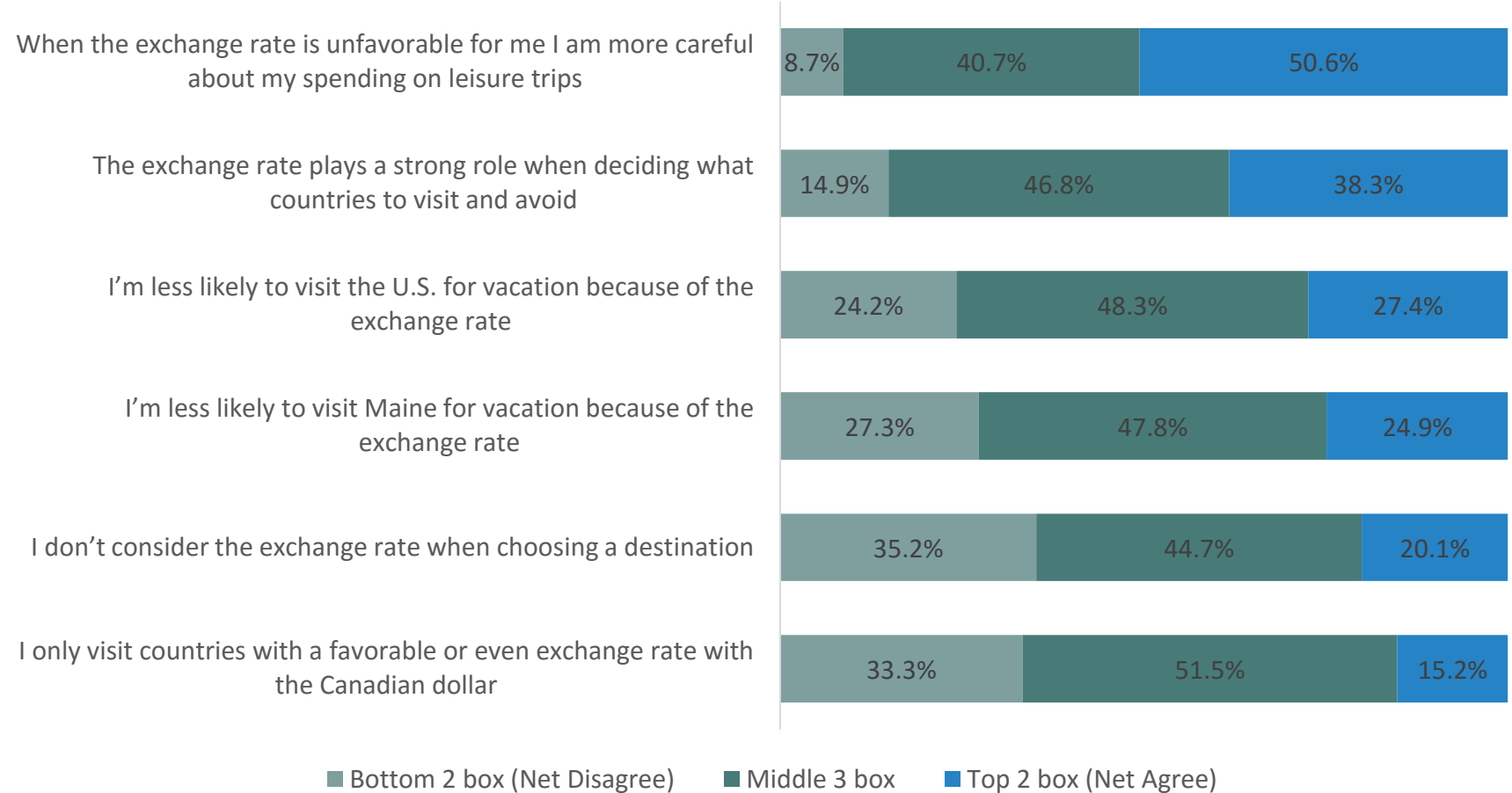
Base: All Respondents



Attitudes Toward the Exchange Rate

- For half (51%) of Eastern Canadian travelers in MOT’s priority segments, the exchange rate is not a deterrent – they still travel but spend more carefully.
- But, just over one-third (38%) indicate the exchange rate plays a role when deciding what countries to visit or avoid.
- Approximately one-quarter (27% and 25%) say they’re less likely to visit the U.S. and less likely to visit Maine because of the exchange rate.
- One in five say they don’t consider the exchange rate when choosing a destination.
- One in six say they only visit countries that have a favorable exchange rate.

Attitudes Towards Exchange Rates



Differences by Segment:

- Compared to other segments, more Balanced Achievers agree that:
 - The exchange rate plays a strong role in deciding what country to visit (43%) and that they only visit countries with a favorable or even exchange rate (25%).
 - They don’t consider the exchange rate when choosing a destination (27%).

Attitudes Toward the Exchange Rate by Province

- Residents of New Brunswick are more impacted by the exchange rate than those in other provinces.
 - More than half (59%) in NB say the exchange rate plays a strong role in their destination decision – more than those in the other provinces.

Attitudes Toward the Exchange Rate Net Agree (Top 2 Box)	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
When the exchange rate is unfavorable for me I am more careful about my spending on leisure trips	72.1% BDE	55.0%	56.8%	48.2%	51.3%
The exchange rate plays a strong role when deciding what countries to visit and avoid	59.0% BCDE	35.0%	38.3%	38.6%	36.0%
I'm less likely to visit the U.S. for vacation because of the exchange rate	41.0% BE	21.7%	30.9%	28.4%	24.3%
I'm less likely to visit Maine for vacation because of the exchange rate	37.7% BDE	18.3%	33.3% B	24.9%	23.3%
I only visit countries with a favorable or even exchange rate with the Canadian dollar	21.3%	11.7%	12.3%	15.7%	14.3%
I don't consider the exchange rate when choosing a destination	14.8%	13.3%	19.8%	20.4%	20.7%

There are no statistically significant differences in attitudes toward exchange rates between past visitors and prospects.

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters A2. Please rate the following statements on how strongly you agree or disagree with each when it comes to leisure trip/vacation/get-away travel decision-making.
 7-pt scale: 1- Strongly Disagree 7 – Strongly Agree Base: all respondents



Motivations For Any Destination

- More than half (56%) of Eastern Canadian travelers in MOT's priority segments have been motivated to take a trip in the past by a package deal – the top motivation by a statistically significant margin.
- Approximately one-third have been motivated by discounts on lodging, a review from online or social media, or an article or story.

Trip Motivations For Any Destination

Trip Motivations	
A package deal	55.9%
Discount or special rate on lodging in the destination	39.0%
A review online or in social media site	33.2%
An article or story online, in print, or on TV	31.5%
Coupon or discount on transportation	26.7%
A commercial or advertisement for the destination	24.3%
A commercial or advertisement for an attraction or activity in the destination	21.3%
A travel agent	21.0%
Coupon or discount on an activity or attraction in the destination	19.1%
A travel or adventure show/expo	16.1%
A commercial or advertisement for a specific place to stay	16.1%
Coupon or discount on dining in the destination	14.4%
A commercial or advertisement for means of transportation	13.3%
Friends/family/relatives recommendation	3.7%
Word of mouth	0.6%
Do my own research	0.5%
Sporting event	0.3%
Past experience	0.3%
Timeshare package	0.2%
Location	0.2%
Magazine/novel	0.2%
Other	1.8%
None of these	6.8%

Motivations For Any Destination by Segment

- More Balanced Achievers have been motivated to visit any destination in the past by a travel show or discount on dining than those in the other two segments.
 - They've been less motivated by a travel agent than the other segments.
- Genuine Originals have been more motivated by an article or story, recommendations of others, and by none of these.
- Social Sophisticates are more motivated by a package deal.

Trip Motivations For Any Destination	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
A package deal	55.0%	49.4%	64.9% AB
An article or story online, in print, or on TV	28.1%	40.4% AC	25.6%
Coupon or discount on an activity or attraction in the destination	23.1% C	17.2%	15.6%
A travel agent	22.7% B	15.3%	25.4% B
A travel or adventure show/expo	21.0% BC	15.1%	10.5%
Coupon or discount on dining in the destination	20.1% BC	9.5%	12.0%
A commercial or advertisement for a specific place to stay (e.g., hotel, B&B, resort, vacation rental, etc.)	19.5% C	14.2%	13.5%
Friends/family/relatives recommendation	1.4%	6.2% A	4.0%
None of these	4.6%	10.5% AC	5.6%

Motivations For Any Destination by Province

- Significantly more residents of NFL have been motivated by a package deal and discounts on transportation than those in other provinces.
- Ontarians have been more motivated to take a trip than Quebecois by a variety of promotions: package deal, online review, discount on transportation, discount on an attraction in destination, an article/story, an ad from a transportation brand.

Trip Motivations For Any Destination	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
A package deal	50.8%	75.0% ACDE	51.9%	60.0% E	49.0%
Discount or special rate on lodging in the destination	36.1%	46.7%	35.8%	41.4%	35.0%
A review online or in social media site (e.g., Yelp, TripAdvisor, etc.)	34.4%	43.3% E	35.8%	37.1% E	25.7%
A travel agent	27.9% C	26.7%	13.6%	20.8%	21.3%
A commercial or advertisement for the destination	23.0%	26.7%	23.5%	26.3%	21.0%
Coupon or discount on transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	23.0%	41.7% ACE	22.2%	30.0% E	21.0%
Coupon or discount on an activity or attraction in the destination	19.7%	21.7%	23.5%	21.6% E	14.0%
An article or story online, in print, or on TV	16.4%	35.0% A	34.6% AE	37.1% AE	22.7%
Coupon or discount on dining in the destination	16.4%	21.7%	13.6%	15.1%	12.3%
A commercial or advertisement for a specific place to stay (e.g., hotel, B&B, resort, vacation rental, etc.)	11.5%	16.7%	16.0%	17.1%	15.0%
A commercial or advertisement for means of transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	8.2%	23.3% AE	11.1%	15.1% E	10.3%
A commercial or advertisement for an attraction or activity in the destination	8.2%	20.0%	17.3%	23.7% A	19.3% A
A travel or adventure show/expo	8.2%	15.0%	12.3%	17.8% A	14.7%
Friends/family/relatives recommendation	4.9%	3.3%	2.5%	3.7%	3.7%
None of these	13.1%	5.0%	13.6% D	5.3%	8.0%

Package Deals That Motivated A Trip

- A majority of package deals that motivated a past trip had one or more inclusions (72%) such as lodging (34%), meals (27%), were all-inclusive (27%), airfare/flights (23%), or attractions (11%).
- One-third say the package deal included monetary benefits: good price (16%), coupons or discounts (12%), free deals (4%), or other things like gratuities and tips (3.5%).

Package Deals That Motivated A Trip

Motivating Package Deal Features	
INCLUSIONS	71.8%
Accommodations	34.0%
Meals	26.7%
All inclusive	26.6%
Airfare/flights	23.2%
Attractions/activities/entertainment	10.8%
Transportation	8.3%
Drinks	7.3%
Tours/excursions	5.3%
Cruise	2.5%
Other inclusions mentions	1.6%
MONETARY BENEFITS	33.8%
GOOD PRICE	16.1%
Good/low price	12.5%
Good/low price hotels	2.1%
Other good price mentions	2.0%
Good/low price flights	1.3%
COUPONS/DISCOUNTS	11.9%
Coupon/discount on an activities/attractions	4.5%
Discounted hotel price	4.1%
Coupon/discount on transportation	3.8%
Good discount/coupons	2.6%
Coupon/discount on dining	1.7%
Other coupons/discounts mentions	0.6%

Motivating Package Deal Features	
FREEBIES	4.0%
Other free deal mentions	1.9%
Free dining	1.2%
Free night stay	0.9%
MISCELLANEOUS MONETARY BENEFITS	3.5%
Gratuities/tip	2.0%
Other miscellaneous monetary benefit mentions	1.9%
LOCATION/DESTINATION	6.8%
Other location/destination mentions	4.4%
Good location/destination	2.6%
MISCELLANEOUS	1.7%
Good quality hotel	1.7%
Other	7.7%
NA/Nothing	1.1%
Don't Know	1.5%

Package Deals That Motivated A Trip by Province

- Respondents in Quebec were less likely to cite package inclusions than other provinces and were more likely to cite a good or low price.
- Significantly more Ontarians cite a multitude of package components and coupons/ discounts than Quebecois do.

Package Deals That Motivated A Trip	New Brunswick n=31 (A)	NFL n=45 (B)	Nova Scotia n=42 (C)	Ontario n=294 (D)	Quebec n=147 (E)
INCLUSIONS	74.2%	80.0% E	78.6% E	74.8% E	63.3%
Accommodations (hotels, resorts, lodging)	38.7%	48.9% E	38.1%	37.4% E	23.8%
All inclusive	32.3%	26.7%	35.7% E	29.9% E	18.4%
Meals (breakfast, dinner)	29.0%	37.8%	26.2%	27.9%	23.1%
Airfare/flights	29.0% E	42.2% E	28.6% E	27.2% E	11.6%
Attractions/activities/entertainment	12.9%	8.9%	14.3%	8.5%	15.0%
Drinks (Alcohol)	9.7%	15.6%	4.8%	7.8%	5.4%
Transportation (e.g., rental car, bus, ferry, hotel shuttle)	3.2%	11.1%	11.9%	10.2% E	4.1%
Tours/excursions	3.2%	2.2%	2.4%	4.4%	8.2%
MONETARY BENEFITS	29.0%	17.8%	38.1% B	33.7% B	36.1% B
COUPONS/DISCOUNTS	12.9%	6.7%	11.9%	15.6% BE	4.8%
Discounted hotel price	9.7%	4.4%	0.0%	5.8% E	0.7%
Coupon/discount on dining	6.5%	0.0%	2.4%	2.4%	0.0%
Coupon/discount on an activities/attractions	3.2%	0.0%	7.1%	6.1% E	1.4%
Coupon/discount on transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	0.0%	2.2%	0.0%	5.4% E	1.4%
GOOD PRICE	9.7%	4.4%	23.8% D	10.5%	28.6% ABD
Good/low price	6.5%	0.0%	21.4% D	6.5%	25.9% AD
Good/low price hotels	3.2%	4.4%	0.0%	2.0%	2.0%
FREE DEALS	0.0%	6.7%	2.4%	5.8% E	0.7%

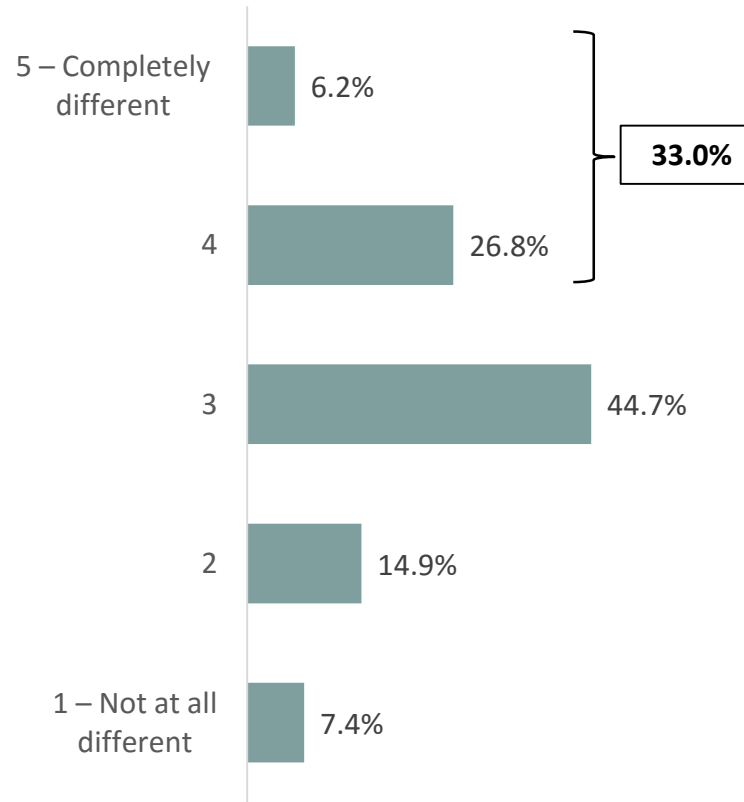
65 Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters
 A4. What was included in the package deal that motivated you to take a leisure trip/vacation/get-away in the past?

Base: A3 PACKAGE DEAL SELECTED

Perceived Differentiation of Maine

- One-third of Eastern Canadian travelers in MOT's priority segments perceive Maine to be different from other New England destinations and nearly half (45%) see it as neither different nor similar.
- Similarly, nearly half (46%) perceive Maine to be different from destinations in Canada - significantly more than the one-third (39%) who perceive it to be different from other states in New England.

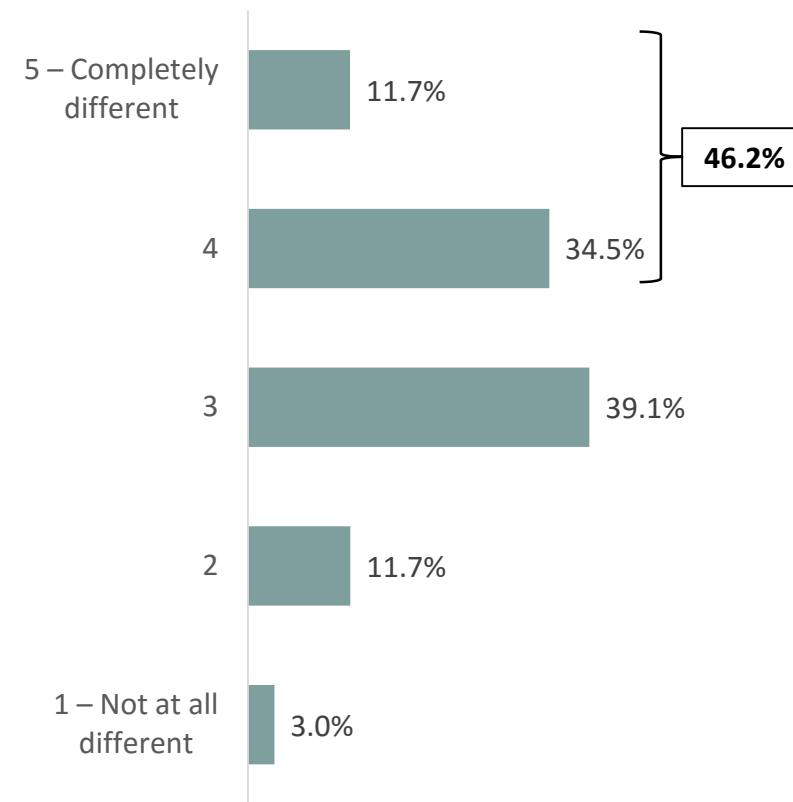
Difference Between Maine and New England as a Leisure Destination



Differences by Segment:

- More Balanced Achievers perceive Maine to be net different from other New England destinations than the other segments (46%).

Difference Between Maine and Other Destinations in Canada



Differences by Segment:

- More Balanced Achievers perceive Maine to be net different from Canadian destinations than the other segments (51%).

A5. How different do you think Maine is as a leisure/vacation/get-away destination from other destinations in the New England region of the U.S. ?
Base: All Respondents, n=1,010

A6. How different do you think Maine is as a leisure trip/vacation/get-away destination from other destinations in Canada?
Base: All Respondents, n=1,010

Perceived Differentiation of Maine by Province & Visitor Status

- There are few differences by province in Maine’s perceived differentiation from other New England States.
- Significantly more in ON and QC perceive Maine to be different from destinations in Canada than do those in NB and NS.
- Not surprisingly, past visitors to Maine are more likely to perceive it as different from New England states and different from destinations in Canada than prospects.

Difference Between Maine and New England as a Leisure Destination	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Net Different (Top 2 Box)	32.8%	26.7%	28.4%	33.7%	33.0%
Neutral	49.2%	36.7%	43.2%	41.2%	50.7% BD
Net Not Different (Bottom 2 Box)	18.0%	36.7% AE	28.4% E	25.1% E	16.3%

Difference Between Maine and Other Destinations in Canada	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Net Different (Top 2 Box)	29.5%	36.7%	33.3%	47.1% AC	48.3% AC
Neutral	45.9%	40.0%	38.3%	38.0%	40.0%
Net Not Different (Bottom 2 Box)	24.6% E	23.3% E	28.4% DE	14.9%	11.7%

Difference Between Maine and New England as a Leisure Destination	Past Visitor n=208	*	Prospect n=802	Difference Between Maine and Other Destinations in Canada	Past Visitor n=208	*	Prospect n=802
Net Different (Top 2 Box)	54.2%	>	28.5%	Net Different (Top 2 Box)	57.5%	>	43.7%
Neutral	39.5%		45.8%	Neutral	35.9%		39.8%
Net Not Different (Bottom 2 Box)	6.3%	<	25.7%	Net Not Different (Bottom 2 Box)	6.6%	<	16.5%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters
 * < or > indicate statistically significant differences in between segments being compared

A5. How different do you think Maine is as a leisure/vacation/get-away destination from other destinations in the New England region of the U.S?

Base: All Respondents

67 A6. How different do you think Maine is as a leisure trip/vacation/get-away destination from other destinations in Canada?

Base: All Respondents



Messaging Impact on Likelihood to Visit Maine

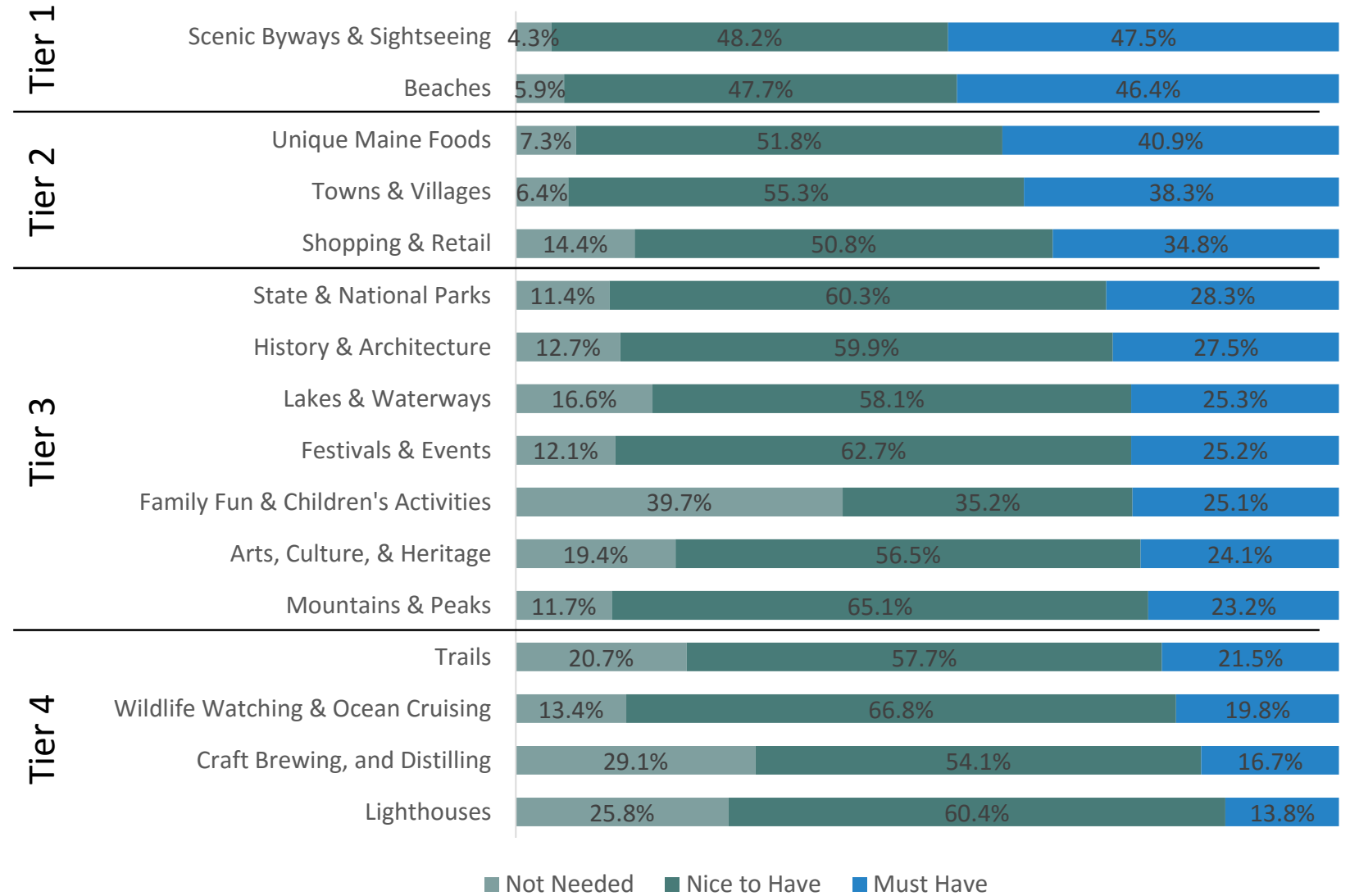


Maine

Interest Areas for an Ideal Vacation in Maine

- The top interest areas (“must haves”) for an ideal vacation in Maine are scenic byways & sightseeing and beaches.
 - These are favored by nearly half of Eastern Canadian travelers in MOT’s priority segments.
- Next most important “must haves” (to more than one-third of respondents) are unique Maine foods, towns & villages, and shopping & retail.
- State and national parks are a “must have” for more than one-quarter of respondents and a “nice to have” for 60% of them.
- Most interest areas are considered “nice to have” by between one-half and two-thirds of respondents - the exception being “family fun & children’s activities.”

Interest Areas/Types of Experiences For An Ideal Vacation in Maine



On average, respondents marked 4.6 items as “must have” for an ideal leisure trip in Maine.

Interest Areas for an Ideal Vacation in Maine by Segment

- More Balanced Achievers are interested in:
 - Festivals & Events, Mountains & Peaks, and Wildlife Watching, and Lighthouses than the other segments.
- More Genuine Originals are interested in Scenic Byways and Sightseeing than other segments
- Social Sophisticates are least interested in:
 - Towns & Villages, State & National Parks, Mountains & Peaks, Arts/Culture/Heritage, History & Architecture, Wildlife Watching, and Trails.

Interest Areas for an Ideal Vacation in Maine Rated: "Must Have"	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Beaches	49.5% B	37.4%	52.7% B
Scenic Byways & Sightseeing	46.3%	53.9% AC	41.6%
Towns & Villages	42.9% C	40.7% C	28.8%
Shopping & Retail	42.1% B	22.7%	38.8% B
Festivals & Events	36.2% BC	17.5%	18.7%
Family Fun & Children's Activities	32.6% B	14.0%	27.6% B
State & National Parks	32.5% C	34.4% C	14.9%
Mountains & Peaks	31.0% BC	24.0% C	11.0%
Lakes & Waterways	29.9% C	23.4%	20.8%
Arts, Culture, & Heritage	29.0% C	25.3% C	15.7%
History & Architecture	28.5% C	34.0% C	18.0%
Wildlife Watching & Ocean Cruising	25.8% BC	18.7% C	12.5%
Trails	23.8% C	27.9% C	10.6%
Lighthouses	19.4% BC	11.6%	8.4%

See Appendix for the descriptions that accompanied each interest category shown above.

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

P1. Please rate each of the following interest areas/types of experiences as "Must have," "Nice to have," or "Not needed" for an ideal leisure trip/vacation/get-away to Maine? 1- Must Have, 2- Nice to Have, 3 - Not Needed, Base: all respondents

Interest Areas for an Ideal Vacation in Maine by Province

- Significantly more Ontarians are interested in History & Architecture (as a “must have”) than other provinces.
- Significantly more in NFL and NS are interested in Shopping & Retail (as a “must have”) than those in Ontario and Quebec.
- New Brunswick is least interested in Festivals & Events (as a “must have”) of all eastern provinces.
- More Quebecois are interested in most (10) of these interest categories as “must haves” than those in New Brunswick.

Interest Areas for an Ideal Vacation in Maine Rated: “Must Have”	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Scenic Byways & Sightseeing	32.8%	41.7%	39.5%	47.8% A	50.0% A
Beaches	44.3%	51.7%	40.7%	40.8%	56.7% CD
Unique Maine Foods	27.9%	33.3%	29.6%	40.2% A	45.3% AC
Towns & Villages	27.9%	33.3%	37.0%	37.1%	42.0% A
Shopping & Retail	42.6%	50.0% DE	51.9% DE	33.7%	32.3%
History & Architecture	13.1%	16.7%	18.5%	31.6% ABCE	23.7% A
Lakes & Waterways	19.7%	15.0%	14.8%	27.8% BC	23.7%
Arts, Culture, & Heritage	8.2%	16.7%	19.8% A	26.5% A	22.7% A
Festivals & Events	9.8%	33.3% A	27.2% A	25.7% A	25.3% A
State & National Parks	16.4%	26.7%	28.4%	25.1%	35.0% AD
Family Fun & Children's Activities	21.3%	23.3%	21.0%	24.5%	27.0%
Mountains & Peaks	18.0%	16.7%	21.0%	21.4%	27.7% BD
Wildlife Watching & Ocean Cruising	9.8%	21.7%	14.8%	20.2% A	20.7% A
Trails	13.1%	26.7%	16.0%	20.0%	25.3% A
Craft Brewing, and Distilling	21.3%	18.3%	13.6%	16.7%	16.7%
Lighthouses	1.6%	13.3% A	7.4%	14.1% AC	15.3% AC

See Appendix for the descriptions that accompanied each interest category shown above.

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

P1. Please rate each of the following interest areas/types of experiences as “Must have,” “Nice to have,” or “Not needed” for an ideal leisure trip/vacation/get-away to Maine? 1- Must Have, 2- Nice to Have, 3 - Not Needed, Base: all respondents

Interest Areas for an Ideal Vacation in Maine by Visitor Status

- Notably, past visitors to Maine and prospects are largely alike in their “must haves” for a vacation in Maine, with two exceptions:
 - Past Visitors are more interested in Beaches than prospects.
 - Prospects are more interested in History & Architecture than past visitors.

Interest Areas for an Ideal Vacation in Maine Rated: “Must Have”	Past Visitor n=208	*	Prospect n=802
Beaches	53.7%	>	44.8%
Scenic Byways & Sightseeing	49.5%		47.0%
Towns & Villages	44.7%		36.9%
Shopping & Retail	39.6%		33.8%
Unique Maine Foods	36.7%		41.8%
State & National Parks	30.5%		27.8%
Lakes & Waterways	27.7%		24.7%
Family Fun & Children's Activities	27.6%		24.6%
Mountains & Peaks	25.8%		22.6%
Trails	23.3%		21.1%
Festivals & Events	21.9%		25.9%
Arts, Culture, & Heritage	20.9%		24.8%
Wildlife Watching & Ocean Cruising	19.7%		19.8%
Lighthouses	18.4%		12.8%
History & Architecture	17.7%	<	29.5%
Craft Brewing, and Distilling	16.9%		16.7%

* < or > indicate statistically significant differences in between segments being compared
See Appendix for the descriptions that accompanied each interest category shown above.

P1. Please rate each of the following interest areas/types of experiences as “Must have,” “Nice to have,” or “Not needed” for an ideal leisure trip/vacation/get-away to Maine? 1- Must Have, 2- Nice to Have, 3 - Not Needed, Base: all respondents

Specific Interests That Would Boost Likelihood to Visit

- For each category shown on the previous slides, respondents were asked what specific items of interest would make them more likely to visit Maine:
- Items at least 25% of respondents are interested in (shown in purple):
 - Old Canada Rd Scenic Byway
 - Old Orchard Beach
 - Ogunquit Beach
 - Bold Coast Scenic Byway
 - Iconic Maine Foods
 - Bar Harbor
 - Maine Foodie Tours
- Items 20%-25% of respondents are interested in (shown in red):
 - Coastal ME Botanical Gardens
 - Rangeley Lakes Scenic Byway
 - Higgins Beach
 - Chocolatiers
 - Portland's Waterfront
 - Kittery Shopping Outlets
 - Bangor & Maine Mall

Specific Interests That Would Improve Likelihood of Visiting Maine

Items that would improve likelihood of visiting Maine		
Tier 1	Scenic Byways & Sightseeing	47.5%
	Old Canada Road Scenic Byway	33.6%
	Bold Coast Scenic Byway	27.6%
	Coastal Maine Botanical Gardens	23.0%
	Rangeley Lakes Scenic Byway	21.7%
	Monhegan Island	18.9%
	Beaches	46.4%
	Old Orchard Beach	33.9%
	Ogunquit Beach	32.0%
	Higgins Beach	21.0%
Tier 2	Sebago Lake State Park	16.9%
	Reid State Park	15.5%
	Unique Maine Foods	40.9%
	Iconic Maine	29.6%
	Maine Foodie Tours	26.4%
	Chocolatiers	22.8%
	Machias Blueberry Festival	15.6%
	Pineland Farms	11.1%
	Towns & Villages	38.3%
	Bar Harbor	28.9%
Portland's Waterfront	24.2%	
Presque Isle	12.7%	
Camden	11.8%	
Bethel	10.3%	

Items that would improve likelihood of visiting Maine		
Tier 2	Shopping & Retail	34.8%
	Kittery Shopping Outlets	24.9%
	Bangor Mall & The Maine Mall	22.7%
	Uniquely Maine	15.0%
	L.L. Bean	13.8%
Tier 3	Center for Maine Craft	11.3%
	State & National Parks	28.3%
	Acadia National Park	19.4%
	Grafton Notch State Park	17.1%
	Popham Beach	14.9%
	Baxter State Park	14.2%
	Camden Hills State Park	13.5%
	History & Architecture	27.0%
	Fort Knox and Penobscot Narrows Bridge Observatory	15.8%
	Maine Maritime Museum	14.1%
	Hallowell Historic District	13.5%
	Maine State House / The Maine State Museum	11.6%
	Roosevelt Campobello International Park	10.7%
	Lakes & Waterways	23.8%
	Moosehead Lake	10.9%
Maine Island Trail	10.9%	
Kennebec River	8.7%	
Fishing	7.7%	
Allagash Wilderness Waterway	7.2%	



Specific Interests That Would Boost Likelihood to Visit (cont.)

- Tier 3 & 4 items, shown here, garner less widespread interest than items shown on the previous slide.

Specific Interests That Would Improve Likelihood of Visiting Maine (cont.)

Items that would improve likelihood of visiting Maine	
Tier 3	Festivals & Events 24.7%
	Pemaquid Oyster Festival 12.4%
	Darling's Waterfront Pavilion 12.0%
	American Folk Festival 9.3%
	Camden Windjammer Festival 9.0%
	Maine International Film Festival 7.4%
	Family Fun & Children's Activities 23.1%
	Palace Playland 14.7%
	Aquaboggan Water Park 13.6%
	Maine Wildlife Park 13.0%
	Funtown Splashtown USA 11.4%
	Seacoast Adventure 9.6%
	Arts, Culture & Heritage 21.4%
	Center of Maine Contemporary Art 9.7%
	Franco-American Heritage 9.0%
	Wabanaki Heritage 8.0%
Langlais Sculpture Tour 7.2%	
Portland Stage 7.0%	
Tier 4	Mountains & Peaks 20.4%
	Maine's High Peaks 11.5%
	Cadillac Mountain 11.0%
	Mt. Katahdin 8.5%
	Mt. Kineo 7.4%

Items that would improve likelihood of visiting Maine	
Tier 4	Trails 21.0%
	Appalachian Trail 15.2%
	Huts & Trails 10.2%
	East Coast Greenway 8.2%
	Carrabassett Trail System 5.3%
	Interconnected Trail System 3.6%
	Wildlife Watching/Ocean Cruising 19.8%
	Lobster Boat Tours 9.4%
	Atlantic Puffins 9.0%
	Windjammer Cruises 8.5%
Tier 4	Boothbay Harbor 8.2%
	Maine Birding Trail 7.5%
	Craft Brewing, and Distilling 11.5%
	Craft Brewing 11.5%
	Maine Beer Trail Passport 10.8%
	Distilleries & Wineries 10.8%
	Lighthouses 13.1%
	Bass Harbor Light 8.7%
	Portland Head Light 7.8%
	Cape Neddick "Nubble" Light 6.0%
West Quoddy Lighthouse 5.7%	
Pemaquid Point Light 5.6%	
None of these 2.6%	

See Appendix for the descriptions that accompanied each interest item shown above.

Specific Interests That Would Boost Likelihood to Visit by Segment

- More Social Sophisticates are interested in Old Orchard Beach, and Higgins Beach than the other segments.
- More Genuine Originals are interested in the Old Canada Road, Bold Coast, Rangeley Lakes Byway, Portland's Waterfront, Acadia, Hallowell District, and Appalachian Trail than the other segments.
- More Balanced Achievers are interested in Chocolatiers, Pemaquid Oyster Festival, Maine Wildlife Park, and Cadillac Mountain than the other segments.

	Specific Interests That Would Boost Likelihood to Visit	Balanced Achievers n=332 (A)	Genuine Originals n=303 (B)	Social Sophisticates n=252 (C)
Beach	Old Orchard Beach	32.3%	28.0%	43.1% AB
	Higgins Beach	19.2%	17.0%	28.2% AB
Scenic Byways & Sightseeing	Old Canada Road Scenic Byway	29.4%	42.7% AC	28.9%
	Bold Coast Scenic Byway	22.1%	36.0% AC	25.8%
	Rangeley Lakes Scenic Byway	17.6%	31.1% AC	16.5%
Maine Foods	Chocolatiers	27.2% BC	20.3%	19.5%
Shopping & Retail	Kittery Shopping Outlets	25.5% B	17.4%	32.7% B
	Bangor Mall & The Maine Mall	23.3% B	15.4%	30.4% B
Towns	Portland's Waterfront	22.1%	31.3% AC	18.7%
Festivals	Pemaquid Oyster Festival	16.3% BC	10.9%	8.7%
State & National Parks	Acadia National Park	19.5% C	28.0% AC	9.1%
	Grafton Notch State Park	17.5% C	23.6% C	9.0%
	Baxter State Park	16.1% C	18.5% C	6.4%
	Popham Beach	15.5% C	19.7% C	8.6%
	Camden Hills State Park	13.7% C	18.3% C	7.6%
History & Architecture	Fort Knox and Penobscot Narrows Bridge Observatory	17.2% C	19.8% C	9.2%
	Maine Maritime Museum	16.4% C	16.5% C	8.1%
	Hallowell Historic District	13.2% C	19.6% AC	6.7%
Family Fun & Children's Activities	Maine Wildlife Park	18.4% BC	9.8%	8.9%
	Palace Playland	16.5% B	8.8%	18.8% B
	Aquaboggan Water Park	15.6% B	8.0%	17.2% B
Mountains	Cadillac Mountain	16.4% BC	10.5% C	4.0%
Trails	Appalachian Trail	15.8% C	22.2% AC	6.1%

Specific Interests That Would Boost Likelihood to Visit by Province

- NB, NFL, and NS are more interested in shopping (Kittery, Bangor Mall, uniquely Maine) than Ontario and Quebec.
- Ontarians are more interested in the Hallowell Historic District than those in the Maritime Provinces.
- Quebecois are more interested in Ogunquit Beach than those in other provinces.
- In both ON and QC interest is higher for Higgins Beach, Old Canada Road, Bold Coast Byway, Maine Foodie Tours, iconic foods, Machias Blueberry Festival, Grafton Notch, Camden Hills, and Popham Beach.

	Specific Interests That Would Boost Likelihood to Visit	New Brunswick n=54 (A)	NFL n=53 (B)	Nova Scotia n=72 (C)	Ontario n=426 (D)	Quebec n=267 (E)
Beaches	Old Orchard Beach	33.3%	45.3% D	31.9%	26.3%	46.1% CD
	Ogunquit Beach	24.1%	30.2%	20.8%	27.7%	41.6% ACD
	Higgins Beach	7.4%	17.0%	8.3%	21.8% AC	22.8% AC
Shopping	Kittery Shopping Outlets	40.7% DE	43.4% DE	44.4% DE	25.4% E	18.7%
	Bangor Mall & The Maine Mall	33.3% E	47.2% DE	44.4% DE	21.8%	18.4%
	L.L. Bean	22.2%	30.2%	30.6%	12.7%	11.6%
	Uniquely Maine	5.6%	26.4% AE	19.4% A	16.9% AE	11.2%
Scenic Byways	Old Canada Road Scenic Byway	18.5%	28.3%	27.8%	35.0% A	33.7% A
	Monhegan Island	13.0%	17.0%	12.5%	18.5%	21.0%
	Bold Coast Scenic Byway	11.1%	24.5%	23.6%	30.3% A	25.5% A
Towns Villages	Bar Harbor	18.5%	34.0%	23.6%	29.6%	29.2%
	Portland's Waterfront	11.1%	32.1% A	26.4% A	24.9% A	23.6% A
Unique Maine Foods	Maine Foodie Tours	14.8%	22.6%	12.5%	27.9% AC	27.0% AC
	Iconic Maine	13.0%	20.8%	13.9%	32.9% ABC	28.5% AC
	Chocolatiers	13.0%	18.9%	15.3%	23.9% A	23.2%
	Machias Blueberry Festival	1.9%	15.1% A	11.1% A	19.2% AE	11.6% A
Fam Fun	Maine Wildlife Park	5.6%	17.0%	15.3%	14.6% A	10.5%
State & Nat'l Parks	Grafton Notch State Park	5.6%	17.0%	12.5%	16.0% A	20.6% A
	Camden Hills State Park	5.6%	13.2%	12.5%	12.9% A	15.4% A
	Popham Beach	3.7%	15.1% A	9.7%	14.3% A	17.6% A
History & Architect.	Maine Maritime Museum	11.1%	17.0%	6.9%	17.4% CE	9.7%
	Fort Knox & Penobscot Narrows Bridge Observatory	9.3%	15.1%	9.7%	18.1% AC	13.5%
	Hallowell Historic District	5.6%	9.4%	8.3%	16.9% ACE	9.7%
Trails	Appalachian Trail	9.3%	20.8%	8.3%	16.2% C	14.6%

See Appendix for the descriptions that accompanied each interest category shown above.
Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters

Specific Interests That Would Boost Likelihood to Visit by Visitor Status

- There are multitude of specific interests that would make prospects more likely to visit than past visitors in the categories of:
 - Beaches
 - Scenic Byways
 - Unique Maine Foods
 - State & National Parks
 - History & Architecture
 - Festivals & Events
 - Family Fun
 - Arts, Culture & Heritage
 - Huts & Trails
 - Craft Brewing & Distilling

	Specific Interests That Would Boost Likelihood to Visit	Past Visitor n=190	*	Prospect n=697
Beach	Higgins Beach	13.2%	<	22.8%
	Sebago Lake State Park	10.7%	<	18.2%
Byways	Bold Coast Scenic Byway	20.3%	<	29.3%
Unique Maine Foods	Iconic Maine	19.8%	<	31.8%
	Maine Foodie Tours	16.0%	<	28.7%
	Chocolatiers	14.8%	<	24.6%
	Machias Blueberry Festival	7.9%	<	17.4%
	Pineland Farms	5.1%	<	12.4%
State & Nat'l Parks	Grafton Notch State Park	10.1%	<	18.7%
	Baxter State Park	9.4%	<	15.2%
	Camden Hills State Park	7.8%	<	14.8%
History & Architecture	Fort Knox and Penobscot Narrows Bridge Observatory	6.7%	<	17.8%
	Hallowell Historic District	5.0%	<	15.4%
	Maine State House / The Maine State Museum	5.5%	<	13.0%
	Roosevelt Campobello International Park	5.6%	<	11.8%
Festivals	Pemaquid Oyster Festival	8.3%	<	13.3%
Family Fun	Seacoast Adventure	5.7%	<	10.5%
Arts, Culture	Center of Maine Contemporary Art	5.8%	<	10.6%
	Langlais Sculpture Tour	4.1%	<	7.9%
Trails	Huts & Trails	4.9%	<	11.4%
Craft Distilling	Distilleries & Wineries	5.9%	<	11.9%

See Appendix for the descriptions that accompanied each interest category shown above.

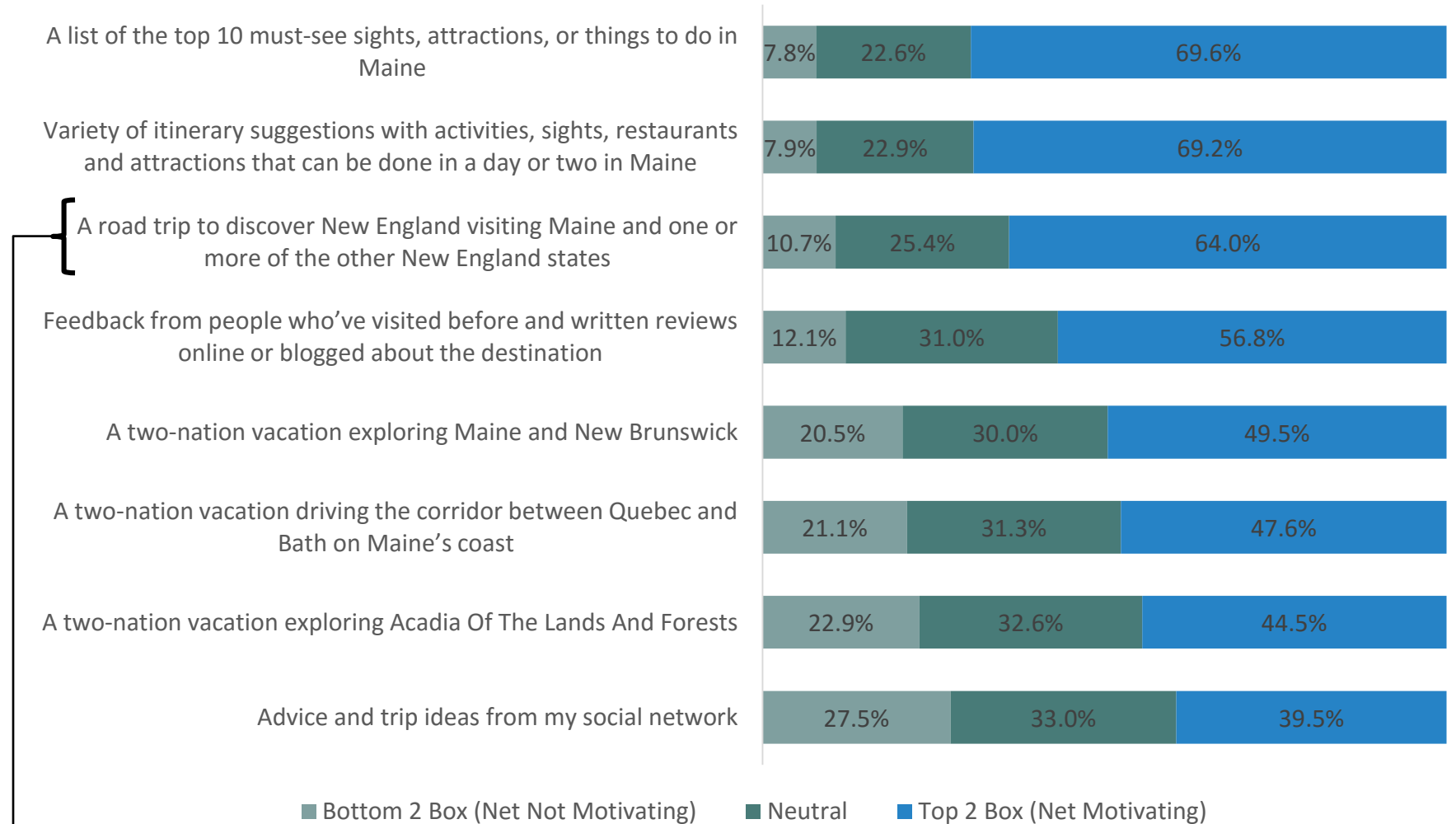
* < or > indicate statistically significant differences in between segments being compared

P2. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there ?
Base: "Must Have" an ideal leisure trip/vacation/get-away to Maine

Content That Would Motivate A Trip to Maine

- More than two-thirds of Eastern Canadian travelers in MOT's priority segments would be motivated to travel to Maine by a list of the top 10 sights and attractions and by a variety of itinerary suggestions.
- One-half or more would be motivated by a Discover New England road trip, a two-nation vacation exploring Maine and New Brunswick, or reviews/feedback from past visitors.
- Just under half would be motivated to visit by a two-nation vacation involving Maine & QC, or exploring the Acadia region.

Strength of factors motivating a trip to Maine



Past visitors are more interested in this than prospects (75% vs. 62%).

Content That Would Motivate A Trip to Maine by Segment

- More Balanced Achievers would be motivated to visit Maine by nearly all content types shown than the other two segments:
 - Must-see top 10 list
 - DNE road trip
 - Feedback and reviews from past visitors
 - Two-Nation vacations:
 - NB & ME
 - Quebec – Bath
 - Acadia regions of QC, NB, and ME
 - Advice from their social network

	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Content That Would Motivate A Trip to Maine			
A list of the top 10 must-see sights, attractions, or things to do in Maine	77.8% BC	65.9%	62.1%
Variety of itinerary suggestions with activities, sights, restaurants and attractions that can be done in a day or two in Maine	72.3% C	69.3%	64.5%
A road trip to discover New England visiting Maine and one or more of the other New England states: New Hampshire, Vermont, Connecticut, Rhode Island, Massachusetts	70.9% BC	61.8%	56.5%
Feedback from people who've visited before and written reviews online or blogged about the destination	63.4% BC	50.0%	55.6%
A two-nation vacation exploring Maine and New Brunswick	61.5% BC	42.5%	40.9%
A two-nation vacation driving the corridor between Quebec and Bath on Maine's coast	58.0% BC	42.2%	39.2%
A two-nation vacation exploring Acadia Of The Lands And Forests - a region spanning parts of Quebec, New Brunswick, and Maine	55.8% BC	42.3% C	30.9%
Advice and trip ideas from my social network	50.2% BC	29.0%	36.8%

Content That Would Motivate A Trip to Maine by Province

- Newfoundland and Labrador are more interested in a list of the top 10 must-see sights, attractions, and things to do in Maine than other provinces.
- Ontario and Quebec are more interested in two-nation vacations than the Maritime Provinces:
 - Exploring the Acadia regions of QC, NB, ME
 - Corridor between QC and Bath
 - Exploring ME and NB

	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Variety of itinerary suggestions with activities, sights, restaurants and attractions that can be done in a day or two in Maine	70.5%	75.0%	65.4%	69.4%	69.0%
A list of the top 10 must-see sights, attractions, or things to do in Maine	62.3%	80.0% ACD	65.4%	68.4%	72.0%
A road trip to discover New England visiting Maine and one or more of the other New England states.	57.4%	63.3%	70.4%	64.7%	62.7%
Feedback from people who've visited before and written reviews online or blogged about the destination	54.1%	61.7%	54.3%	57.1%	56.3%
Advice and trip ideas from my social network	52.5% CE	51.7% CE	32.1%	42.2% E	33.7%
A two-nation vacation exploring Maine and New Brunswick	42.6%	33.3%	30.9%	53.1% BC	47.7% BC
A two-nation vacation exploring Acadia Of The Lands And Forests - a region spanning parts of Quebec, New Brunswick, and Maine	34.4%	31.7%	32.1%	46.3% BC	45.0% BC
A two-nation vacation driving the corridor between Quebec and Bath on Maine's coast	31.1%	31.7%	33.3%	49.0% ABC	49.7% ABC

Motivations for Future Trip to Maine

- More than half of Eastern Canadian travelers in MOT's priority segments would be motivated to visit Maine by a package deal or a discount on lodging.
- Nearly one-third would be interested in discounts on transportation and on activities or attractions in Maine.
- Approximately one-quarter would be motivated by discounts on dining, reading reviews, or an article or story about the destination.

Motivational Factors for a Trip to Maine	
A package deal	58.9%
Discount or special rate on lodging in the destination	54.2%
Coupon or discount on transportation	31.4%
Coupon or discount on an activity or attraction in the destination	30.0%
Coupon or discount on dining in the destination	27.6%
A review online or in social media site	26.0%
An article or story online, in print, or on TV	24.2%
A commercial or advertisement for the destination	20.5%
A commercial or advertisement for an attraction or activity in the destination	17.9%
A commercial or advertisement for a specific place to stay	14.8%
A travel or adventure show/expo	12.8%
A travel agent	12.3%
A commercial or advertisement for means of transportation	9.1%
Other	2.9%
None of these	7.2%

Motivations for Future Trip to Maine by Segment

- More Balanced Achievers would be motivated by a travel agent, a travel show, or a commercial or advertisement to visit Maine than the other segments.
- Genuine Originals and Social Sophisticates would be more motivated by lodging discounts.
- Social Sophisticates would be more motivated by a package deal.

Motivations for Future Trip to Maine	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
A package deal	56.7%	53.2%	68.7% AB
Discount or special rate on lodging in the destination	46.9%	59.8% A	58.0% A
Coupon or discount on an activity or attraction in the destination	31.2%	25.5%	33.6% B
A commercial or advertisement for the destination	24.0% B	16.5%	20.2%
An article or story online, in print, or on TV	21.2%	29.1% A	22.5%
A travel agent	18.3% BC	5.0%	12.6% B
A travel or adventure show/expo	17.0% BC	11.2%	8.9%
A commercial or advertisement for a specific place to stay (e.g., hotel, B&B, resort, vacation rental, etc.)	13.8%	12.5%	19.1% B
A commercial or advertisement for means of transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	12.7% BC	7.3%	6.2%

Motivations for Future Trip to Maine by Province

- NFL would be more motivated to visit Maine by a discount on lodging than those in other provinces.
- NB would be more motivated to visit by a discount on dining.
- Ontarians would be more motivated to visit by a discount on transportation and an article or story about Maine.
- NFL, ON, and QC would be more motivated by a commercial or ad for Maine.

Motivations for Future Trip to Maine	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
A package deal	63.9%	66.7%	64.2%	59.0%	57.3%
Discount or special rate on lodging in the destination	62.3%	68.3% CDE	49.4%	54.9%	52.0%
Coupon or discount on transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	21.3%	46.7% AE	33.3%	36.5% AE	22.7%
Coupon or discount on an activity or attraction in the destination	37.7%	35.0%	35.8%	31.2%	26.0%
A review online or in social media site (e.g., Yelp, TripAdvisor, etc.)	19.7%	28.3%	21.0%	29.2% E	21.7%
Coupon or discount on dining in the destination	42.6% DE	31.7%	33.3%	29.0%	23.0%
An article or story online, in print, or on TV	18.0%	28.3%	16.0%	27.1% CE	20.7%
A commercial or advertisement for the destination	8.2%	21.7% A	17.3%	19.4% A	23.7% A
A commercial or advertisement for an attraction or activity in the destination	18.0%	21.7%	12.3%	17.6%	18.7%
A travel or adventure show/expo	13.1%	11.7%	8.6%	13.9%	11.7%
A commercial or advertisement for a specific place to stay (e.g., hotel, B&B, resort, vacation rental, etc.)	8.2%	25.0% AD	14.8%	13.3%	17.3% A
A travel agent	9.8%	13.3%	9.9%	11.8%	13.7%
A commercial or advertisement for means of transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	0.0%	10.0%	6.2%	10.8%	7.3%
Other	0.0%	0.0%	7.4%	2.4%	3.7%
None of these	11.5%	5.0%	9.9%	6.5%	7.7%

Motivations for Future Trip to Maine by Visitor Status

- More prospects would be motivated to take a future trip to Maine than past visitors via:
 - A package deal
 - Discount on transportation
 - An article or story about Maine
 - A travel or adventure show/expo

Motivations for Future Trip to Maine	Past Visitor n=208	*	Prospect n=802
A package deal	48.2%	<	61.1%
Discount or special rate on lodging in the destination	53.1%		54.5%
Coupon or discount on transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	20.8%	<	33.6%
Coupon or discount on an activity or attraction in the destination	26.7%		30.7%
Coupon or discount on dining in the destination	27.9%		27.5%
A review online or in social media site (e.g., Yelp, TripAdvisor, etc.)	21.9%		26.9%
An article or story online, in print, or on TV	16.8%	<	25.8%
A commercial or advertisement for the destination	18.6%		20.9%
A commercial or advertisement for an attraction or activity in the destination	18.4%		17.7%
A commercial or advertisement for a specific place to stay (e.g., hotel, B&B, resort, vacation rental, etc.)	14.8%		14.9%
A travel or adventure show/expo	8.3%	<	13.8%
A travel agent	11.2%		12.6%
A commercial or advertisement for means of transportation (e.g., airline, cruise ship, car rental company, ferry service, etc.)	5.9%		9.8%
Other	1.8%		3.1%
None of these	9.5%		6.7%

What a Package Deal Would Need to Include

- A majority of respondents expect a package deal to include lodging.
 - More than half expect it to include meals and drinks as well as an activity or attraction.
- More than half in NFL expect the package to include private transportation.
- NB are more interested in having meals included.
- More in Nova Scotia are interested in shopping/retail discounts.
- Ontarians are more interested in public transportation discounts.

What a Package Deal Would Need to Include	
Lodging	88.4%
Meals and drinks	59.4%
Meals	58.0%
An activity or attraction	57.6%
Public transportation (e.g., bus, ferry, hotel shuttle)	26.1%
Private transportation (e.g., rental car)	23.8%
Discount at a store or shopping mall	21.3%
Other	2.1%
None of these	1.2%

• Prospects are more interested in public transportation and private transportation included in the package deal than past visitors.
 • Past visitors are more interested in discounts at stores/malls than prospects.

What a Package Deal Would Need to Include	New Brunswick n=39 (A)	NFL n=40 (B)	Nova Scotia n=52 (C)	Ontario n=289 (D)	Quebec n=172 (E)
Lodging	92.3%	95.0% D	94.2% D	86.5%	90.1%
Meals	71.8% CE	60.0%	51.9%	58.8%	55.8%
Meals and drinks	69.2%	65.0%	51.9%	60.9%	56.4%
An activity or attraction	53.8%	55.0%	67.3%	57.8%	56.4%
Discount at a store or shopping mall	33.3%	30.0%	46.2% DE	19.7%	18.6%
Private transportation (e.g., rental car)	23.1%	52.5% ACDE	26.9%	27.0% E	15.7%
Public transportation (e.g., bus, ferry, hotel shuttle)	15.4%	27.5%	15.4%	29.4% AC	22.7%

What a Package Deal Would Need to Include by Segment

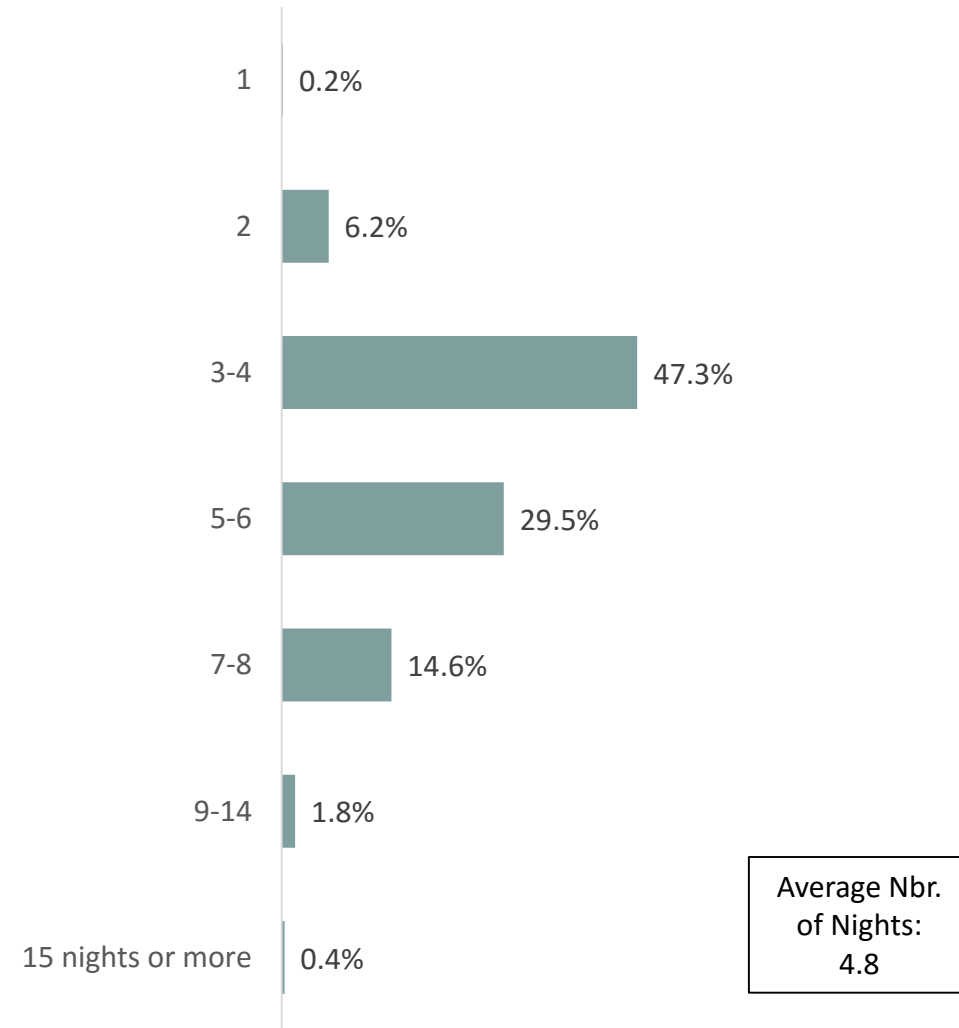
- Lodging is an expected inclusion of package deals more so among Genuine Originals and Social Sophisticates.
- Meals and drinks and discounts at stores are expected inclusions among Balanced Achievers and Social Sophisticates more so than Genuine Originals.

What a Package Deal Would Need to Include To Motivate a Trip to ME	Balanced Achievers n=216 (A)	Genuine Originals n=191 (B)	Social Sophisticates n=193 (C)
Lodging	81.8%	92.4% A	92.4% A
Meals and drinks	64.4% B	46.3%	65.7% B
An activity or attraction	62.1% C	58.4%	51.4%
Public transportation (e.g., bus, ferry, hotel shuttle)	31.0% C	23.8%	22.3%
Private transportation (e.g., rental car)	29.5% C	23.5%	17.2%
Discount at a store or shopping mall	25.4% B	14.2%	23.0% B

Package Deal: Length of Stay

- Among those who would be motivated by a package deal, nearly half (47%) would want the package it to be for a 3 or 4 night stay.
- By Province:
 - If they could get package deal, those from NFL would stay the most nights (5.5) on average, followed by ON (4.9) and QC (4.7).
- By Visitor Status:
 - Prospects would stay longer than past visitors, on average (4.8 vs. 4.4 nights) if they could get a package deal.

Number of Nights Would Stay in
Maine



Likeminded Brands and Cultural Nuances



Maine

Like-Minded Canadian Brands

- Eastern Canadian travelers in MOT's priority segments offered a diverse and fragmented list of like-minded Canadian brands that sync with MOT's Originality brand platform.
- Top mentions include [Roots Canada](#), [Mountain Equipment Coop](#), [Tim Hortons](#), and [Lululemon](#).
- Answers are continued on next slide.

Like-Minded Canadian Brands

Canadian Brands	First Mention	Total Mentions
BRANDS	18.4%	20.8%
Roots Canada	5.4%	7.2%
MEC (Mountain Equipment Co-op)	2.0%	2.9%
Tim Hortons	1.5%	3.1%
Other brands mentioned	2.5%	5.3%
Lululemon Athletica	0.9%	1.8%
Other clothing brands	0.9%	1.9%
Hudson's Bay	0.7%	1.9%
Other tour company mentions	0.6%	1.0%
Molson Coors	0.6%	0.9%
Molson Canadian	0.5%	1.0%
East Coast Lifestyle	0.4%	0.5%
Canadian Tire	0.3%	1.2%
Canada Goose	0.3%	1.0%
Air Canada	0.3%	0.8%
Westjet	0.3%	0.5%
Expedia	0.3%	0.3%
L.L.Bean	0.2%	0.5%
Kanuk	0.2%	0.5%
Other beauty company mentions	0.2%	0.2%
Globus journeys	0.1%	0.3%
NAMES OF PLACES	10.2%	13.1%
Other place mentions	2.3%	5.0%
Quebec	1.3%	2.3%
Nova Scotia	1.2%	2.3%
New Brunswick	1.1%	2.4%

Canadian Brands	First Mention	Total Mentions
Ontario	1.0%	1.6%
Newfoundland and Labrador	0.7%	1.6%
Prince Edward Island (PEI)	0.6%	1.9%
British Columbia	0.3%	0.8%
Muskoka	0.3%	0.3%
Gaspésie	0.3%	0.7%
Ogunquit	0.3%	0.6%
Cuba	0.2%	0.2%
Irving	0.2%	0.2%
Cape Breton Island	0.1%	0.4%
MISCELLANEOUS	4.1%	8.6%
Good/nice/great	0.7%	1.1%
Relaxing	0.6%	1.0%
Maple syrup	0.4%	1.2%
Unique/original	0.4%	0.5%
Old orchard	0.3%	0.6%
Beautiful	0.2%	0.8%
History	0.2%	0.3%
Authentic	0.2%	0.2%
Water	0.2%	0.5%
Shops/Shopping	0.1%	0.9%
Fun/enjoyable/exciting	0.1%	0.7%
Via rail	0.1%	0.5%
Maple leaf	0.1%	0.2%
Other festival mentions	0.1%	0.6%
Fresh	0.1%	0.6%

Like-Minded Canadian Brands (cont.)

- As occurred in the prior qualitative phase, many respondents had trouble answering this question:
 - Some responses are places (even Canadian provinces), foods, and activities they associate with Maine
 - More than half didn't answer the question (54% N/A or nothing and another 3% answered with "don't know")

Like-Minded Canadian Brands (cont.)

Canadian Brands	First Mention	Total Mentions
PLACES/ATTRACTIONS	2.5%	7.5%
Other beach mentions	1.0%	2.1%
Other mountain mentions	0.3%	1.1%
Other places/attractions mentions	0.3%	2.7%
Other park mentions	0.3%	1.5%
Nature	0.2%	1.0%
Scenic/scenery	0.2%	0.7%
Ocean/Sea/river	0.1%	0.6%
Lake	0.1%	0.2%
FOOD	2.1%	4.1%
Lobsters	1.2%	1.8%
Seafood	0.3%	1.2%
Other Food mentions	0.3%	0.7%
Other dairy product mentions	0.1%	0.2%
Blueberry	0.1%	0.2%
BREWERY	1.6%	3.4%
Other brewery mentions	0.8%	1.5%
Craft Beer	0.3%	0.6%
Moosehead	0.2%	0.4%
Canadian whisky/beer	0.2%	0.3%
Mill Street Brewery	0.1%	0.2%
ACTIVITIES	1.0%	3.3%
Other activities mentions	0.3%	1.3%
Sail	0.2%	0.3%
Sight tours	0.1%	0.2%
Canoeing	0.1%	0.2%

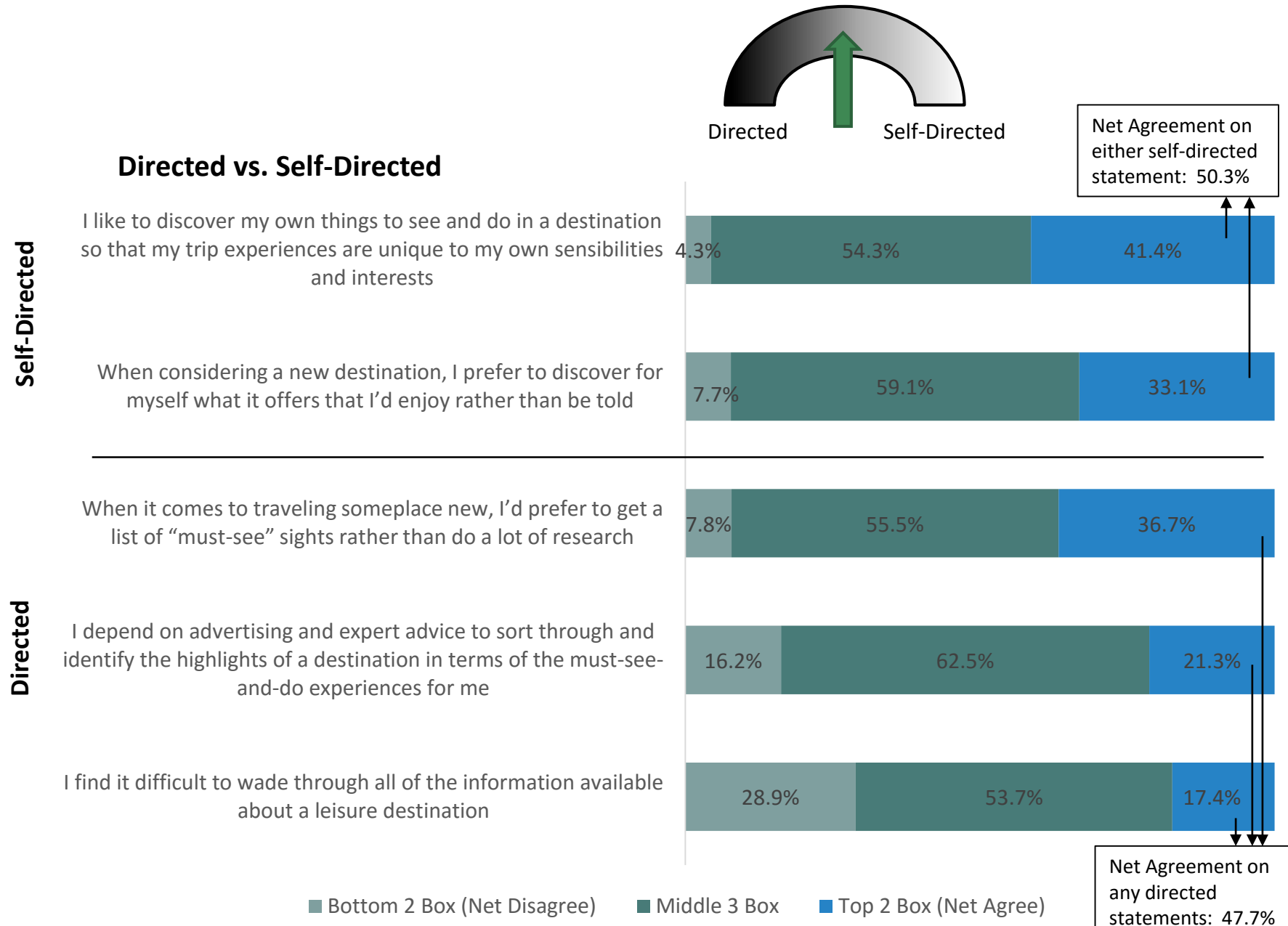
Canadian Brands	First Mention	Total Mentions
Other sports mentions	0.1%	0.6%
Fishing	0.1%	0.6%
Other shoe brand mentions	0.0%	0.3%
Bombardier	0.0%	0.2%
Tranquil	0.0%	0.2%
Niagara	0.0%	0.7%
Kittery	0.0%	0.3%
Montreal Downtown	0.0%	0.2%
Freeport	0.0%	0.2%
Friendly	0.0%	0.3%
Culture	0.0%	0.2%
MER	0.0%	0.2%
Master card	0.0%	0.2%
Visa	0.0%	0.2%
Romantic	0.0%	0.1%
Hotels/restaurants	0.0%	0.3%
Towns	0.0%	0.2%
Poutine	0.0%	0.3%
Labatts blue	0.0%	0.4%
Sleeman	0.0%	0.2%
Adventure	0.0%	0.3%
Hiking	0.0%	0.3%
Other	2.6%	7.9%
NA/Nothing	54.3%	54.5%
Don't Know	3.2%	3.1%

Externally-Directed vs. Self-Directed Travel Planning & Discovery

- Overall Eastern Canadian travelers in MOT's priority segments are equally as much self-directed as externally-directed when it comes to travel planning and destination discovery.
- More than half place themselves in the middle of the scale for all statements related to externally-directed and self-directed travel planning and discovery.

Notably, more past visitors are in net agreement with the self-directed statements than prospects (63% vs. 48%).

Directed vs. Self-Directed



Externally-Directed vs. Self-Directed by Segment

- Genuine Originals are least externally directed of the segments – fewer agree with the directed statements than do Balanced Achievers and Social Sophisticates.
- Balanced Achievers are simultaneously more Externally-Directed and more Self-Directed than Social Sophisticates.

Directed vs. Self-Directed Travel Planning & Discovery		Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Net Agree (Top 2 Box)				
DIRECTED	When it comes to traveling someplace new, I'd prefer to get a list of "must-see" sights rather than do a lot of research	47.8% BC	21.5%	38.9% B
	I depend on advertising and expert advice to sort through and identify the highlights of a destination in terms of the must-see-and-do experiences for me	32.2% BC	8.1%	21.4% B
	I find it difficult to wade through all of the information available about a leisure destination	26.5% BC	9.6%	13.6%
SELF-DIRECTED	I like to discover my own things to see and do in a destination so that my trip experiences are unique to my own sensibilities and interests	45.7% C	43.8% C	32.1%
	When considering a new destination, I prefer to discover for myself what it offers that I'd enjoy rather than be told	40.3% C	31.1% C	25.3%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters B2. To what extent do you agree or disagree with the following statements about when researching, planning, or traveling for a leisure trip/vacation/get-away in general?

7-pt scale: 1- Strongly Disagree 7 – Strongly Agree

Base: All Respondents

Externally-Directed vs. Self-Directed by Province

- Findings are fairly consistent across the eastern provinces with few meaningful differences.

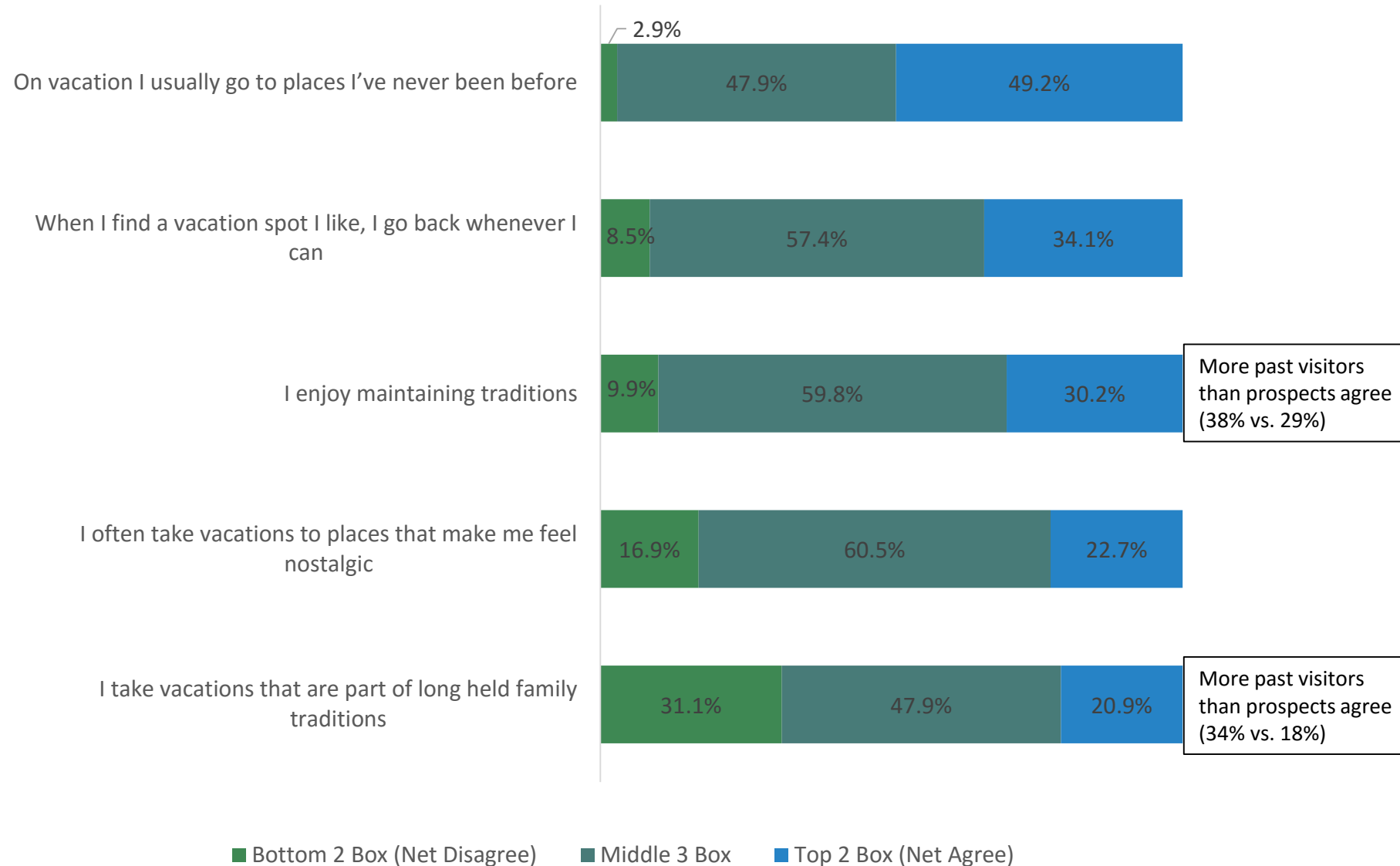
Directed vs. Self-Directed Travel Planning & Discovery		New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Net Agree (Top 2 Box)						
DIRECTED	When it comes to traveling someplace new, I'd prefer to get a list of "must-see" sights rather than do a lot of research	32.8%	36.7%	29.6%	34.7%	41.0%
	I find it difficult to wade through all of the information available about a leisure destination	21.3%	15.0%	13.6%	21.4% E	10.7%
	I depend on advertising and expert advice to sort through and identify the highlights of a destination in terms of the must-see-and-do experiences for me	19.7%	26.7% C	12.3%	22.0% C	20.7%
SELF-DIRECTED	I like to discover my own things to see and do in a destination so that my trip experiences are unique to my own sensibilities and interests	37.7%	30.0%	40.7%	40.4%	44.3% B
	When considering a new destination, I prefer to discover for myself what it offers that I'd enjoy rather than be told	24.6%	28.3%	32.1%	33.7%	33.3%

Letters in a cell indicate that cell is statistically greater than the cells indicated by the letters B2. To what extent do you agree or disagree with the following statements about when researching, planning, or traveling for a leisure trip/vacation/get-away in general?
7-pt scale: 1- Strongly Disagree 7 – Strongly Agree

Traditions vs. New Experiences

- Roughly half or more of Eastern Canadian travelers in MOT's priority segments are in the middle of the scale when it comes to both repeating destinations (family traditions and nostalgia) and going places they've never been before.
- This suggests, given the multiple vacations they take per year, that they do both – try new destinations and go back to old favorites.

Traditions vs. New Experiences



Traditions vs. New Experiences by Segment

- More so than the other segments, Balanced Achievers agree that they go back to vacation spots they like, enjoy maintaining traditions, take vacations that are nostalgic, and take vacations that are part of family traditions.
 - Genuine Originals agree least with these statements.

Traditions vs. New Experiences	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Net Agree (Top 2 Box)			
On vacation I usually go to places I've never been before	51.3%	49.9%	45.4%
When I find a vacation spot I like, I go back whenever I can	48.6% BC	19.4%	30.8% B
I enjoy maintaining traditions	45.5% BC	15.9%	25.6% B
I often take vacations to places that make me feel nostalgic	38.7% BC	10.0%	14.8%
I take vacations that are part of long held family traditions	34.3% BC	8.7%	16.3% B

Traditions vs. New Experiences by Province

- Few respondents in NFL take vacations that are part of long held family traditions compared to NS, ON, and QC.
- More Ontarians enjoy maintaining traditions and take vacations that make them feel nostalgic than Quebecois.
- Ontarians and Quebecois are more likely to go places they've never been on vacation before than in Nova Scotia.

Traditions vs. New Experiences	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Net Agree (Top 2 Box)					
On vacation I usually go to places I've never been before	42.6%	38.3%	34.6%	51.0% C	49.3% C
When I find a vacation spot I like, I go back whenever I can	36.1%	35.0%	40.7%	34.7%	32.0%
I enjoy maintaining traditions	24.6%	26.7%	37.0%	32.7% E	26.0%
I often take vacations to places that make me feel nostalgic	19.7%	21.7%	33.3% E	25.3% E	17.3%
I take vacations that are part of long held family traditions	18.0%	10.0%	23.5% B	21.4% B	20.7% B

Self-Reported Media Habits



Maine

Upcoming Events and Activities

- Nearly two-thirds (65%) of Eastern Canadian travelers learn of upcoming events online – by Google search, or on city/local websites.
- Some find out from newspapers/print ads, social networking sites, friends and family, TripAdvisor, on the radio, or on TV.

Sources: Upcoming Events, Concerts, Family Activities, etc.

Where They Learn About Upcoming Events and Activities	
ONLINE MEDIUM	65.4%
Web/Internet/online	42.8%
Google	14.6%
Other online medium mentions	5.3%
Websites	3.9%
City websites	3.4%
Email	2.6%
Local websites	0.9%
Ticketmaster	0.6%
PRINT MEDIUM	18.1%
Newspaper	14.9%
Magazines	2.8%
Travel literature/books/guides	1.7%
Montreal Gazette newspaper	0.4%
SOCIAL NETWORKING	19.7%
Facebook	10.7%
Social media	7.7%
Twitter	2.6%
Blogs	1.9%
BROADCAST MEDIA	10.3%
Radio	5.8%
TV	5.3%
Commercials/advertisements	1.1%
CBC	0.2%

Where They Learn About Upcoming Events and Activities	
WORLD-OF-MOUTH	14.6%
Friends/Family	12.1%
Word of mouth	3.7%
OTHER/CHANNEL UNSPECIFIED	7.8%
Out of Home (ex : Brochure/ flyers/ newsletter/posters)	3.5%
Concerts/festivals/fests/events	1.4%
Calendar of events	0.9%
News (medium unspecified)	1.1%
Media (medium unspecified)	0.8%
Community announcements	0.8%
TRAVEL COMPANY/SITES	13.0%
Trip advisor	5.7%
Other travel company/sites mentions	3.1%
Tourism websites	1.6%
Travel agent	1.3%
Tourist office/kiosk	1.3%
Travel agency	0.8%
Expedia	0.8%
Other	7.7%
NA/Nothing	3.1%
Don't Know	3.0%

Upcoming Events and Activities by Segment

- More Genuine Originals learn about upcoming local events through blogs, newspaper, or out-of-home than the other segments.
- More Social Sophisticates learn about upcoming local events online than the other segments.

Where They Learn About Upcoming Events and Activities	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
ONLINE MEDIUM (NET)	60.6%	67.7%	69.7% A
Web/Internet/online	40.7%	40.3%	48.8% AB
SOCIAL NETWORKING (NET)	16.1%	21.0%	23.3% A
Facebook	7.4%	11.7%	14.2% A
Blogs	1.2%	3.9% AC	0.6%
PRINT MEDIUM (NET)	13.6%	25.0% AC	16.3%
Newspaper	11.2%	21.3% AC	12.6%
BROADCAST MEDIA (NET)	6.9%	12.0% A	13.2% A
OTHER/CHANNEL UNSPECIFIED (NET)	4.3%	11.8% A	8.0%
Out-of-Home (ex : Brochure/flyers/newsletter/posters)	1.5%	6.6% AC	2.5%
NA/Nothing	5.7% BC	2.0%	0.8%
Don't Know	5.7% BC	0.6%	1.8%

Upcoming Events and Activities by Province

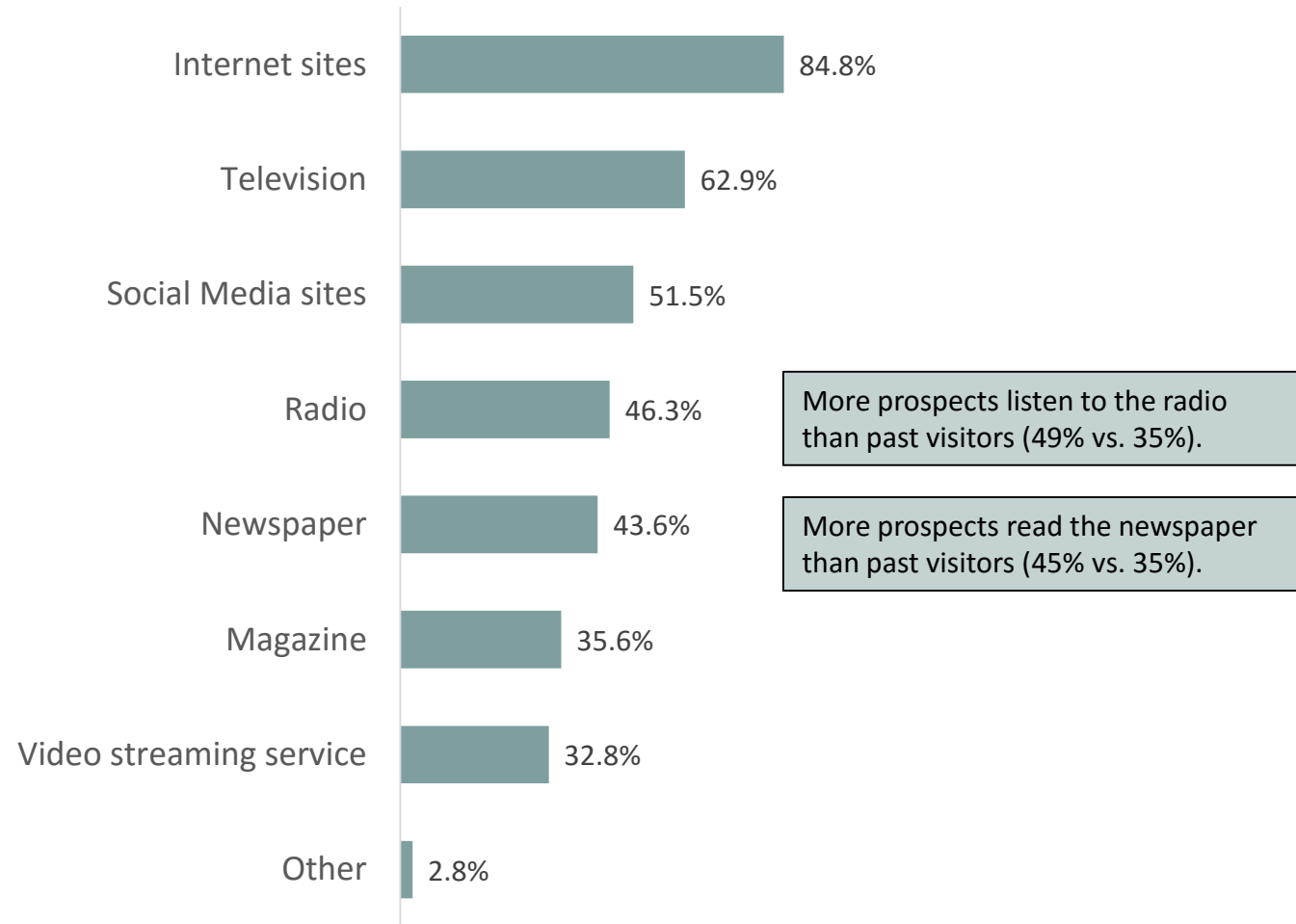
- Quebecois are more likely to learn about upcoming local events online than those in other provinces.
- NB, NFL, and NS are more likely to learn about upcoming local events through social media like Facebook than Ontario and Quebec.
- NFL are least likely to learn about upcoming events through a print medium like newspaper.

Where They Learn About Upcoming Events and Activities	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
ONLINE MEDIUM	50.8%	66.7%	55.6%	63.3%	71.7% ACD
Web/Internet/online	32.8%	46.7%	34.6%	37.6%	53.0% ACD
SOCIAL NETWORKING	31.1% E	38.3% DE	35.8% DE	20.4% E	14.0%
Facebook	24.6% DE	18.3% E	22.2% DE	10.8%	7.0%
Social media (unspecified)	6.6%	20.0% ADE	14.8% E	8.2%	5.0%
WORD-OF-MOUTH	23.0% E	16.7%	12.3%	17.3% E	9.3%
Friends/family	16.4%	15.0%	9.9%	14.5% E	7.7%
Word of mouth	6.6%	1.7%	2.5%	4.7% E	2.0%
PRINT MEDIUM	19.7% B	6.7%	18.5% B	20.4% BE	15.0% B
Newspaper	18.0% B	5.0%	12.3%	17.1% B	12.0% B
TRAVEL COMPANY/SITES	14.8%	11.7%	12.3%	12.9%	13.3%
Travel agent	3.3%	1.7%	0.0%	1.8% E	0.3%
Tourist office/kiosk	0.0%	0.0%	1.2%	0.4%	3.0% D
BROADCAST MEDIA	11.5%	15.0%	12.3%	11.6% E	7.3%
TV	4.9%	5.0%	7.4%	6.3% E	3.3%
OTHER/CHANNEL UNSPECIFIED	6.6%	8.3%	7.4%	9.6% E	5.0%
Out-of-Home (ex : Brochure/flyers/newsletter/posters)	3.3%	0.0%	2.5%	4.5% E	2.0%
Concerts/festivals/fests/events	0.0%	1.7%	1.2%	1.8% E	0.0%

Media Channels Used Regularly

- A majority (85%) of Eastern Canadian travelers in MOT's priority segments regularly use the internet – statistically more than any other channel.
- More than half watch television and use social media sites.
- Fewer than half read the newspaper and approximately one-third read magazines and subscribe to video streaming services.

Media Channels Regularly Used



Media Channels Used Regularly by Segment

- More Social Sophisticates regularly watch TV than the other segments.
- Fewer Balanced Achievers use the internet regularly compared to the other segments.

Media Channels Used Regularly	Balanced Achievers n=378 (A)	Genuine Originals n=349 (B)	Social Sophisticates n=283 (C)
Internet sites (other than social media)	79.2%	89.8% A	86.7% A
Television	59.8%	60.4%	70.3% AB
Social Media sites	53.6%	47.3%	53.7%
Radio	41.6%	52.7% A	45.3%
Newspaper	40.2%	47.5%	44.0%
Magazine	37.6% C	38.5% C	29.3%
Video streaming service (e.g., Netflix, Shomi, CraveTV, Crackle, etc.)	30.8%	36.0%	31.9%

Media Channels Used Regularly by Province

- Media channel consumption varies by province:
 - NFL have higher consumption of Internet and TV than other provinces.
 - Ontario has higher consumption of magazine and newspaper than the Maritime Provinces
 - Quebec has lower consumption than most other provinces of social media, TV, radio, and video streaming.

Media Channels Used Regularly	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Internet sites (other than social media)	85.2%	93.3% CDE	81.5%	84.9%	84.3%
Social Media sites	65.6% E	73.3% DE	65.4% E	55.5% E	40.3%
Television	62.3%	88.3% ACDE	69.1% E	67.3% E	53.0%
Radio	45.9% E	51.7% E	54.3% E	54.7% E	31.0%
Video streaming service (e.g., Netflix, Shomi, CraveTV, Crackle, etc.)	32.8% E	53.3% AE	44.4% E	41.2% E	16.0%
Magazine	24.6%	38.3%	24.7%	39.4% ACE	31.3%
Newspaper	21.3%	25.0%	42.0% AB	47.8% ABF	40.3% AB
Other	0.0%	0.0%	3.7%	2.0%	4.3%

Websites Visited Regularly

- Websites visited by Eastern Canadian travelers in MOT's priority segments are diverse and fragmented.
- Top mentions include:
 - Google (19%)
 - TripAdvisor (14%)
 - CBC (12%)
 - Yahoo! (9%)
 - CNN (8%)
 - MSN (7%)
 - YouTube (6%)
 - Expedia (5%)

Internet sites	n=856
Google/Google search	18.9%
Trip advisor	13.9%
CBC (Canadian Broadcasting Corporation)	12.3%
Yahoo!	9.2%
CNN	8.0%
Other travel sites mentions	7.8%
MSN	6.8%
Other news sites mentions	5.8%
YouTube	5.6%
Expedia	5.2%
La Presse	3.7%
Toronto star/star.com	3.4%
The Globe & Mail	3.3%
Amazon	2.9%
Facebook	2.8%
BBC	2.7%
CTV	2.6%
TVA	2.5%
The Weather network	2.5%
TSN (The Sports Network)	2.2%
ESPN	2.1%
Google news	2.1%

Internet sites	n=856
Pinterest	2.0%
Ebay	2.0%
Huffington Post	2.0%
Travelocity	1.9%
Sportsnet	1.7%
Various hotels site	1.5%
RDS	1.5%
TMZ	1.3%
Hotmail	1.2%
People.com	1.1%
Canoe	1.1%
Trivago	1.1%

Differences by Segment:

- Social Sophisticates are less likely than the other segments to visit CBC's website (8.4%) and more likely to visit TVA's (5.6%).
- Genuine Originals are less likely to:
 - visit Expedia (2.7%)
 - visit any social media site YouTube (3.7%)
- Genuine Originals are more likely to
 - read The Globe & Mail (6.2%)
 - read Google News (3.9%)

Social Media Sites Visited Regularly

- Most Eastern Canadian travelers in MOT's priority segments can be found on Facebook (89%).
- Other social sites they use include Twitter (38%), Instagram (27%), Pinterest (9%), and LinkedIn (8%).

More prospects use Facebook than past visitors (91% vs. 83%).

Social Media Sites Regularly Visited

Social Media Sites	n=542
SOCIAL MEDIA SITES	93.6%
Facebook	89.4%
Twitter	37.8%
Instagram	27.4%
Pinterest	9.3%
Snapchat	4.1%
LinkedIn	8.1%
Other social media sites mentions	1.3%
YouTube	5.1%
Tumblr	1.7%
Reddit	1.2%
Odnoklassniki	0.7%
MISCELLANEOUS SITES	7.8%
Google	3.6%
Radio	0.5%
CNN	1.0%

Social Media Sites	n=542
MSN	0.8%
IG	0.3%
CBC (Canadian Broadcasting Corporation)	0.3%
News	0.8%
Quora	0.3%
Yahoo!	0.4%
Yelp	0.4%
TRAVEL SITES	5.1%
Trip advisor	3.7%
Other travel sites mentions	1.4%
Expedia	0.4%
Travelocity	0.4%
Other	4.5%
NA/Nothing	0.4%
Don't Know	0.3%

Differences by Segment:

- More Balanced Achievers regularly use Snapchat (5.8%) and Google (6.0%).

Social Media Sites Visited Regularly by Province

- While the most ubiquitous social platform across all provinces is Facebook, statistically more respondents in NB and NS say they are on Facebook compared to ON and QC.

Social Media Sites Visited Regularly	New Brunswick n=40 (A)	NFL n=44 (B)	Nova Scotia n=53 (C)	Ontario n=272 (D)	Quebec n=121 (E)
SOCIAL MEDIA SITES	97.5% E	95.5%	100.0% DE	94.5%	89.3%
Facebook	97.5% DE	95.5%	96.2% DE	88.6%	87.6%
Twitter	32.5%	45.5% E	50.9% E	41.2% E	27.3%
Youtube	5.0%	0.0%	9.4% E	7.0% E	0.8%
Pinterest	2.5%	6.8%	5.7%	10.7% A	8.3%

Social Influencers Followed

- Overall, a minority (25%) of Eastern Canadian travelers in MOT's priority segments follow social influencers.
- Among those that do, some follow travel bloggers (2.5%), other bloggers (1.7%), actors or celebrities (6%), musicians (3%), politicians (2%), or authors (2%).

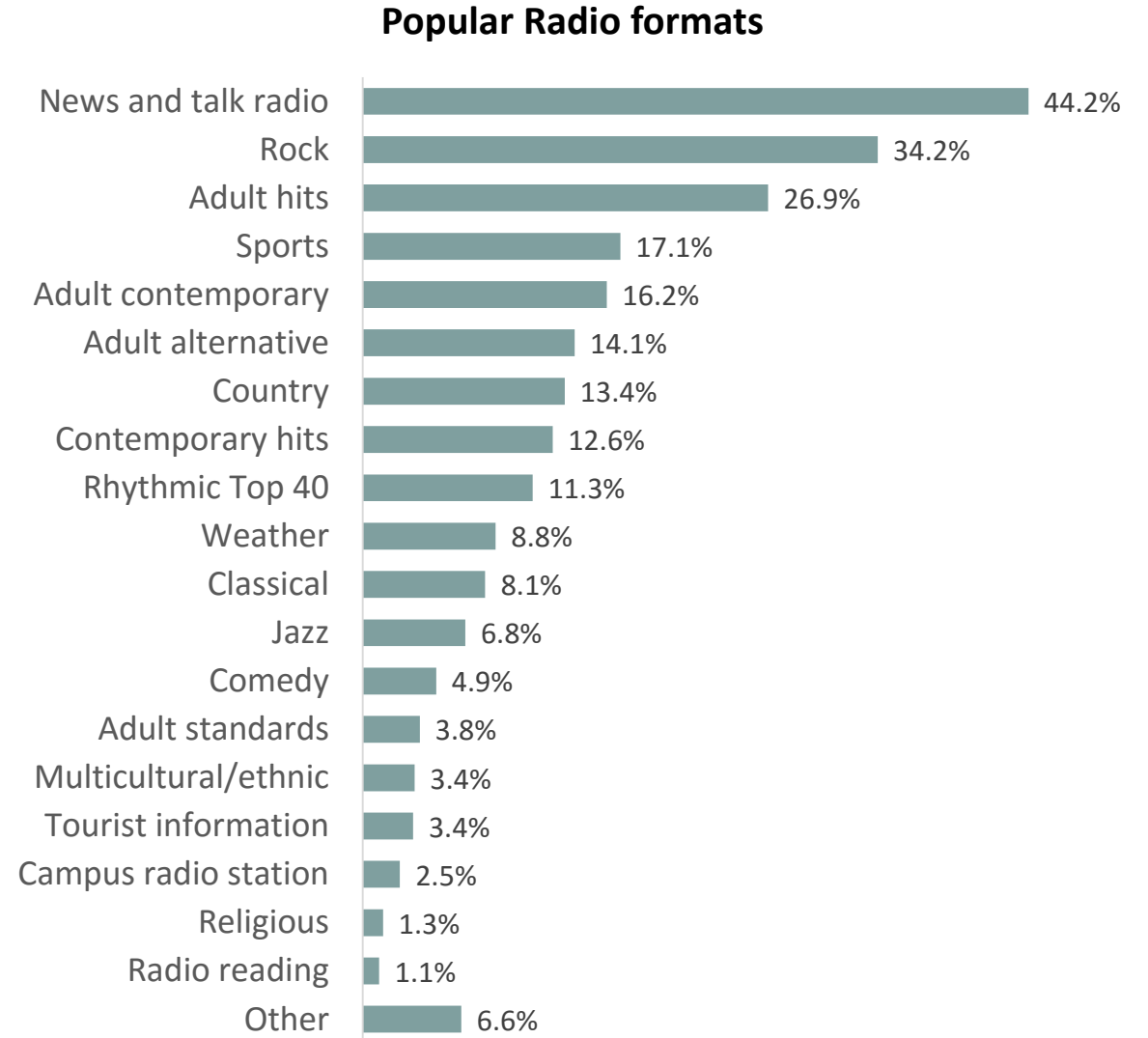
Social Influencers Followed

Social Influencers Followed	n=542
SOCIAL NETWORKING	11.5%
Facebook	5.3%
Travel bloggers/travel	2.5%
Bloggers/blogs	1.7%
Other social networking mentions	1.8%
Instagram	1.0%
Twitter	0.9%
YouTube	0.4%
ARTIST/CELEBRITY	5.9%
Other actors/celebrity mentions	4.0%
Musician/music stars	2.9%
MISCELLANEOUS	6.6%
Friends	1.8%
Politics	1.6%

Social Influencers Followed	n=542
Various authors mentions	1.8%
Google	0.4%
National Geographic	0.3%
Fashion	0.7%
News	0.3%
Sports mentions	0.3%
Arts	0.4%
TRAVEL COMPANY	1.4%
TripAdvisor	1.1%
Other travel company mentions	0.3%
Other	8.9%
NA/Nothing	73.9%
Don't Know	1.3%

Radio Formats

- The most listened-to radio format by a significant margin is news and talk radio (44%).
- Other mentions include rock (34%), adult hits (27%), sports (17%), and adult contemporary (16%).



Radio Formats by Segment

- More Balanced Achievers listen to tourist information than other segments.
- Fewer Social Sophisticates listen to classical, comedy, or jazz than other segments.
- Social Sophisticates are more likely to listen to adult hits, rhythmic top 40, and country.

Radio Formats	Balanced Achievers n=158 (A)	Genuine Originals n=186 (B)	Social Sophisticates n=128 (C)
Adult hits	29.6%	20.3%	32.6% B
Weather	13.5% B	5.2%	7.7%
Rhythmic Top 40	9.9%	8.0%	17.7% B
Classical	9.7% C	11.2% C	1.8%
Country	9.3%	12.3%	20.4% A
Comedy	8.4% C	3.9%	1.7%
Jazz	8.2% C	10.1% C	0.4%
Tourist information	7.4% BC	1.3%	0.9%

Radio Formats by Province

- There are few meaningful differences between provinces:
 - Quebecois are less likely to listen to Country than other provinces.

Popular Radio Formats	New Brunswick n=28+ (A)	NFL n=31 (B)	Nova Scotia n=44 (C)	Ontario n=268 (D)	Quebec n=93 (E)
Adult hits	50.0%	29.0%	29.5%	22.4%	36.6% D
Rock	39.3%	35.5%	38.6%	36.2%	26.9%
Country	25.0%	32.3% E	22.7% E	15.7% E	1.1%
Adult contemporary	21.4%	19.4%	25.0%	16.8%	11.8%
News and talk radio	17.9%	54.8%	52.3%	39.9%	57.0% D
Adult alternative	10.7%	12.9%	15.9%	14.9%	11.8%
Contemporary hits	10.7%	3.2%	6.8%	13.8% B	11.8%
Rhythmic Top 40	10.7%	9.7%	11.4%	10.8%	12.9%
Comedy	7.1%	0.0%	4.5%	5.2%	4.3%
Weather	7.1%	19.4%	4.5%	9.7%	6.5%
Jazz	3.6%	6.5%	2.3%	7.5%	6.5%
Adult standards	0.0%	6.5%	9.1%	4.1%	2.2%
Classical	0.0%	6.5%	6.8%	8.2%	9.7%
Multicultural/ethnic	0.0%	0.0%	0.0%	2.6%	7.5%
Sports	0.0%	12.9%	18.2%	20.5% E	9.7%
Tourist information	0.0%	12.9%	0.0%	3.4%	3.2%

Newspapers Read Regularly

- The top newspapers read by Eastern Canadian travelers in MOT's priority segments include:
 - Toronto Star (30%)
 - The Globe and Mail (25%)
 - La Press (13%)
 - Le Journal de Montreal (11%)

Newspapers Read Regularly

Newspapers	n=423
Toronto Star/The Star	30.20%
The Globe and Mail	24.50%
La Presse/La Presse+	13.40%
Le Journal de Montreal	10.60%
National Post	9.50%
Montreal Gazette/The Gazette	9.30%
Toronto Sun	9.10%
New York Times	6.30%
Metro	6.20%
Local newspaper	4.50%
Ottawa Citizen	4.00%
The Chronicle Herald	2.60%
Hamilton Spectator	2.60%
24 Hours	2.60%
Le Soleil	2.30%
Windsor Star	2.10%
Le Devoir	2.10%
Journal de Quebec	1.80%
Ottawa Sun	1.60%
Financial Post	1.60%
London Free Press	1.30%
The Record	1.30%
USA Today	1.30%
The Sun	1.30%
Les Affaires	1.30%
Washington Post	1.20%
St. Catharine's Standard	1.10%
Telegraph Journal	0.80%
La tribune	0.80%

Newspapers	n=423
Huffington Post	0.80%
Le Quotidien	0.80%
Financial Times	0.80%
Sault Star	0.50%
Kingston Whig	0.50%
Brantford Expositor	0.50%
Simcoe Reformer	0.50%
The Standard	0.50%
Barrie Examiner	0.50%
Le Droit	0.50%
The Daily Gleaner	0.50%
Cambridge Times	0.50%
Winnipeg Free Press	0.50%
Markham	0.50%
Wall Street Journal	0.50%
Chatham Daily News	0.50%
Le Nouvelliste	0.50%
Niagara	0.50%
Peterborough Examiner	0.50%
Standard Freeholder	0.50%
Cape Breton post	0.40%
Western Star	0.30%
Post	0.30%
Metro Halifax	0.20%
The Guardian	0.20%
The Telegram	0.20%
Other	15.50%
NA/Nothing	0.90%
Don't Know	0.30%

Newspapers Read Regularly by Segment

- More Genuine Originals read The Globe and Mail and the National Post than other segments.
- Balanced Achievers are more likely to read the Metro.

Newspapers Read Regularly	Balanced Achievers n=151 (A)	Genuine Originals n=154 (B)	Social Sophisticates n=118 (C)
The Globe and Mail	21.1%	32.4% AC	18.9%
Metro	10.0% B	3.6%	4.6%
National post	7.3%	14.5% AC	6.0%
New York Times	4.9%	11.1% C	1.9%
Ottawa Citizen	1.4%	4.4%	6.7% A
Le Devoir	0.7%	4.3% A	0.9%

Magazines Read Regularly

- Magazine interests are diverse and fragmented among Eastern Canadian travelers in MOT's priority segments.
- Top mentions include:
 - Maclean's (10%)
 - National Geographic (9%)
 - People (9%)
 - Chatelaine (9%)
 - Canadian Living (7%)
 - CAA (7%)
 - Time (6%)
 - Toronto Life (6%)

Magazines Read Regularly

Magazines	n=351
Maclean's	9.6%
National Geographic	9.1%
People	9.0%
Chatelaine	8.5%
Canadian Living	7.3%
CAA magazine	6.8%
Time	5.7%
Toronto Life	5.5%
Travel magazine	5.4%
Other travel magazine mentions	4.4%
Travel and leisure	4.4%
Vogue	3.7%
Other home/décor magazine mentions	3.7%
Conde Nast Traveler	3.6%
L'actualité	3.2%
Readers Digest	3.1%
Money Sense	3.1%
Other business/finance magazine mentions	3.1%
Cosmopolitan	3.1%
The Economist	2.8%
House and Home	2.6%
Other news/current affairs magazine mentions	2.4%
US Weekly	2.3%
Style at Home	2.3%
Coup de Pouce	2.2%
Canadian geographic	2.2%
Other lifestyle magazine mentions	2.1%
Men's Health	2.0%

Magazines	n=351
Cottage Life	1.9%
Other women magazine mentions	1.9%
Elle	1.9%
Food Network	1.9%
Other cooking/recipes magazine mentions	1.7%
Other science/technology magazine mentions	1.7%
Entertainment Weekly	1.7%
Zoomer	1.6%
Parents	1.6%
Other health/fitness magazine mentions	1.4%
Other sports magazine	1.4%
ROB/Report On Business	1.3%
Harpers Bazaar	1.3%
Other sports/activities magazine	1.3%
Other celebrity gossip/entertainment magazine mentions	1.3%
Other fashion magazine mentions	1.3%
Ricardo	1.3%
Women's Health	1.2%
Sportsnet	1.2%
Esquire	1.1%
New Yorker	1.1%
Bon Appetit	1.1%
Golf Digest	1.1%
Discover	1.1%
Explore	1.1%
Other car magazine mentions	1.1%
Enroute	1.1%

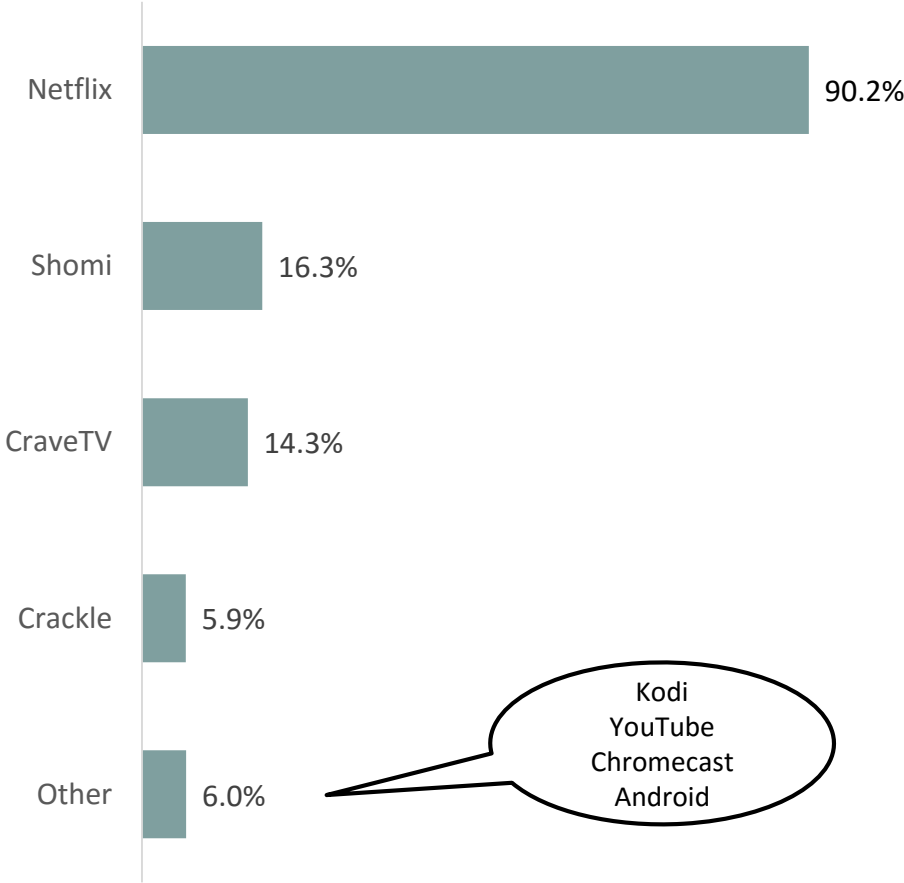
Differences by Segment:

- Genuine Originals are more likely to read Conde Nast Traveler (7.3%).
- Social Sophisticates are more likely to read People (15.6%) and US Weekly (8.8%).

Video Streaming Services Used

- Top video streaming services used by Eastern Canadian travelers in MOT's priority segments include:
 - Netflix (90%)
 - Shomi (16%)
 - CraveTV (14%)

Video streaming services regularly used



Language Preference

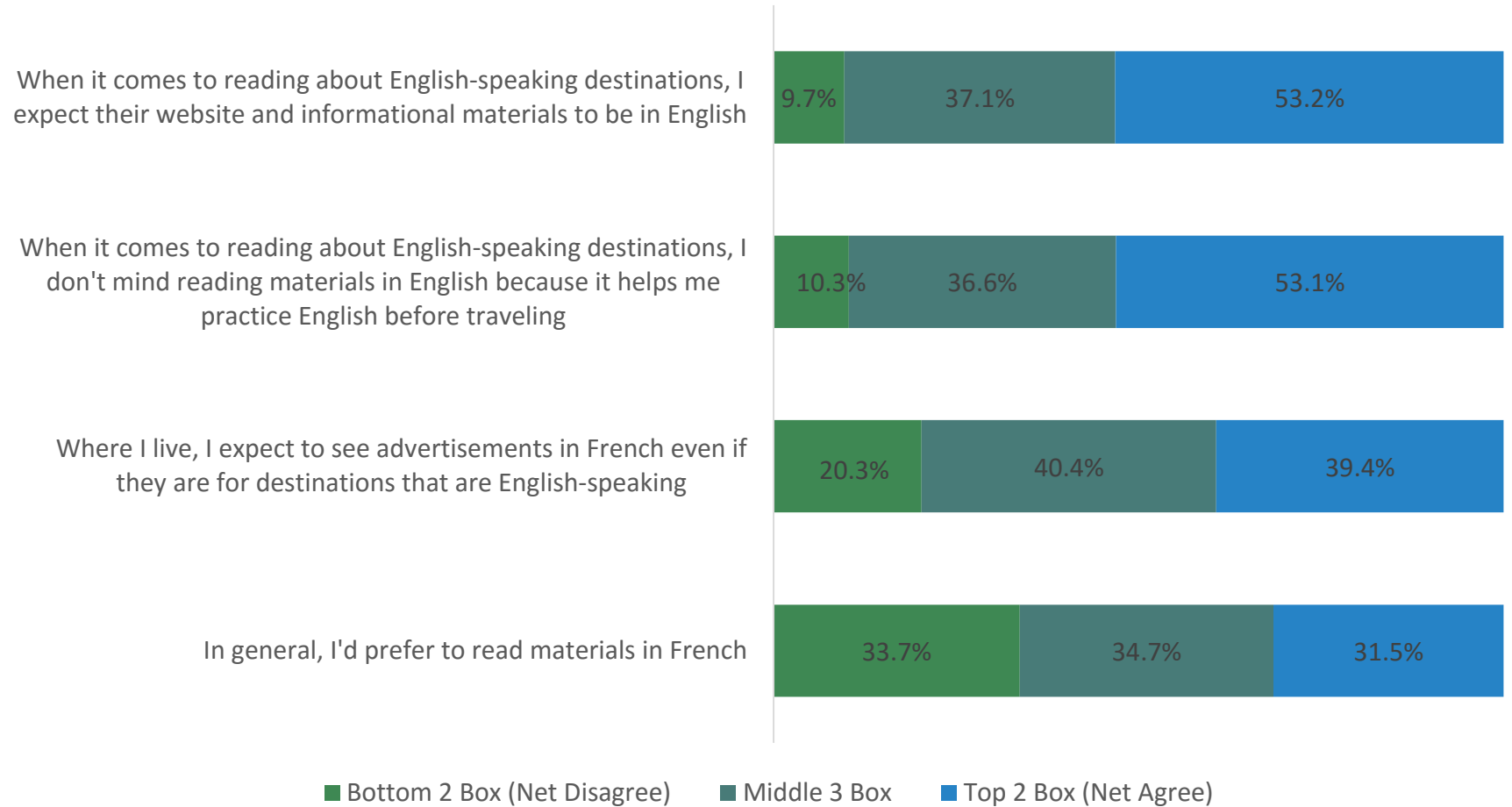


Maine

Language Preference

- More than half of those who are French-speaking or who reside in French-speaking regions expect an English-speaking destination's materials to be in English and equally as many don't mind reading such materials in English because it helps them practice English before they travel.
- That said, just over one-third (39%) expect to see advertisements in French where they live, but just as many (40%) don't feel strongly (are in middle).
- One-third prefer to read materials in French while another one-third disagree.

French Language Preferences



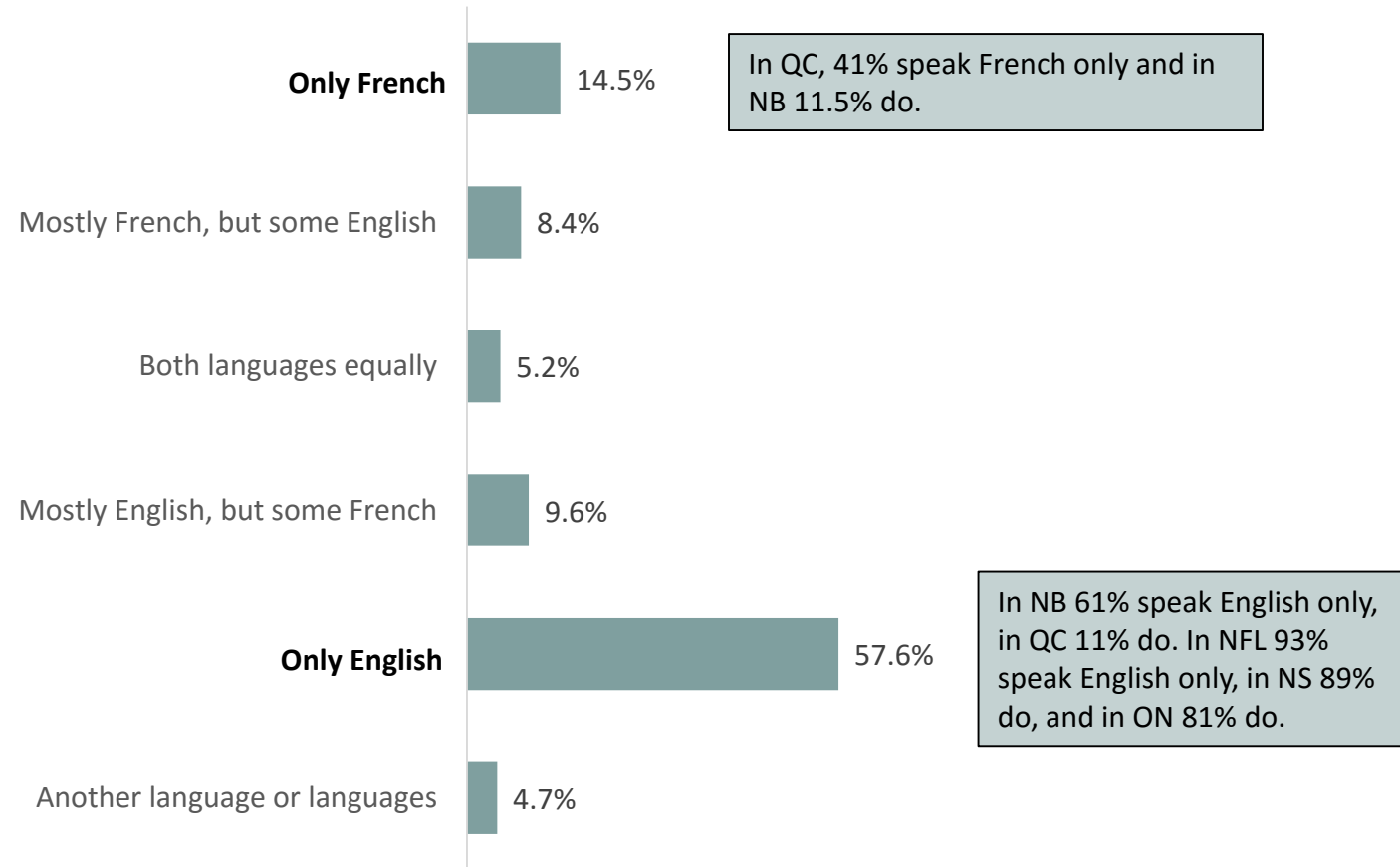
Differences by Segment:

- More Social Sophisticates agree that advertisements where they live should be in French (48.4%).
- Balanced Achievers and Social Sophisticates are both in stronger agreement that they prefer to read in French (36% and 39%).

Language Spoken

- Of all respondents surveyed, one in six (15%) say they speak only French at home.
- Nearly one-quarter (23%) speak a mix of French and English.
- More than half (58%) speak English only.

Language Spoken at Home



Differences by Segment:

- More Social Sophisticates speak French only (20.2%).
- Balanced Achievers are more likely to speak mostly French but some English (11.8%).
- Balanced Achievers and Genuine Originals are more likely to speak both languages equally (6.3% and 6.1%).
- Genuine Originals are more likely to speak English only (61%).

APPENDIX



Maine

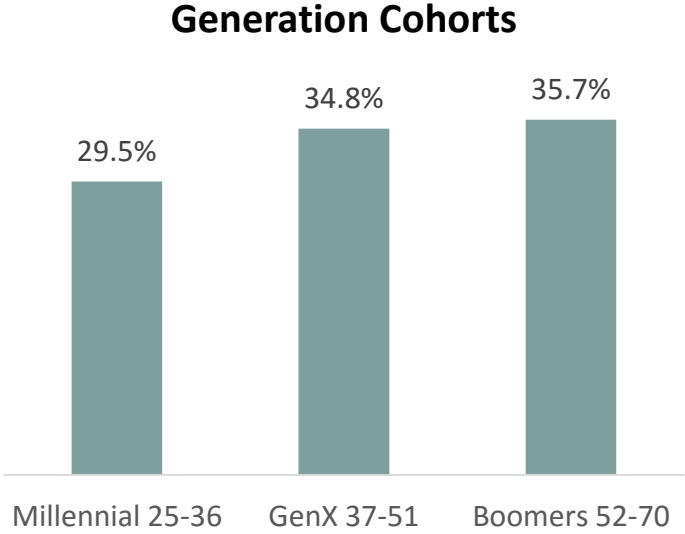
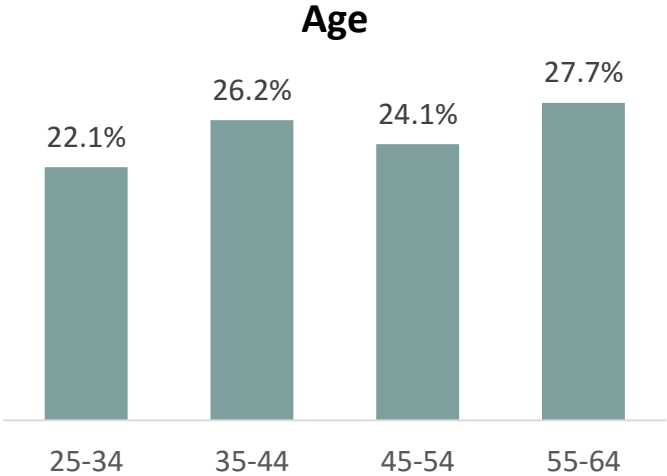
Respondent Profile



Maine

Demographics: Age & Cohort

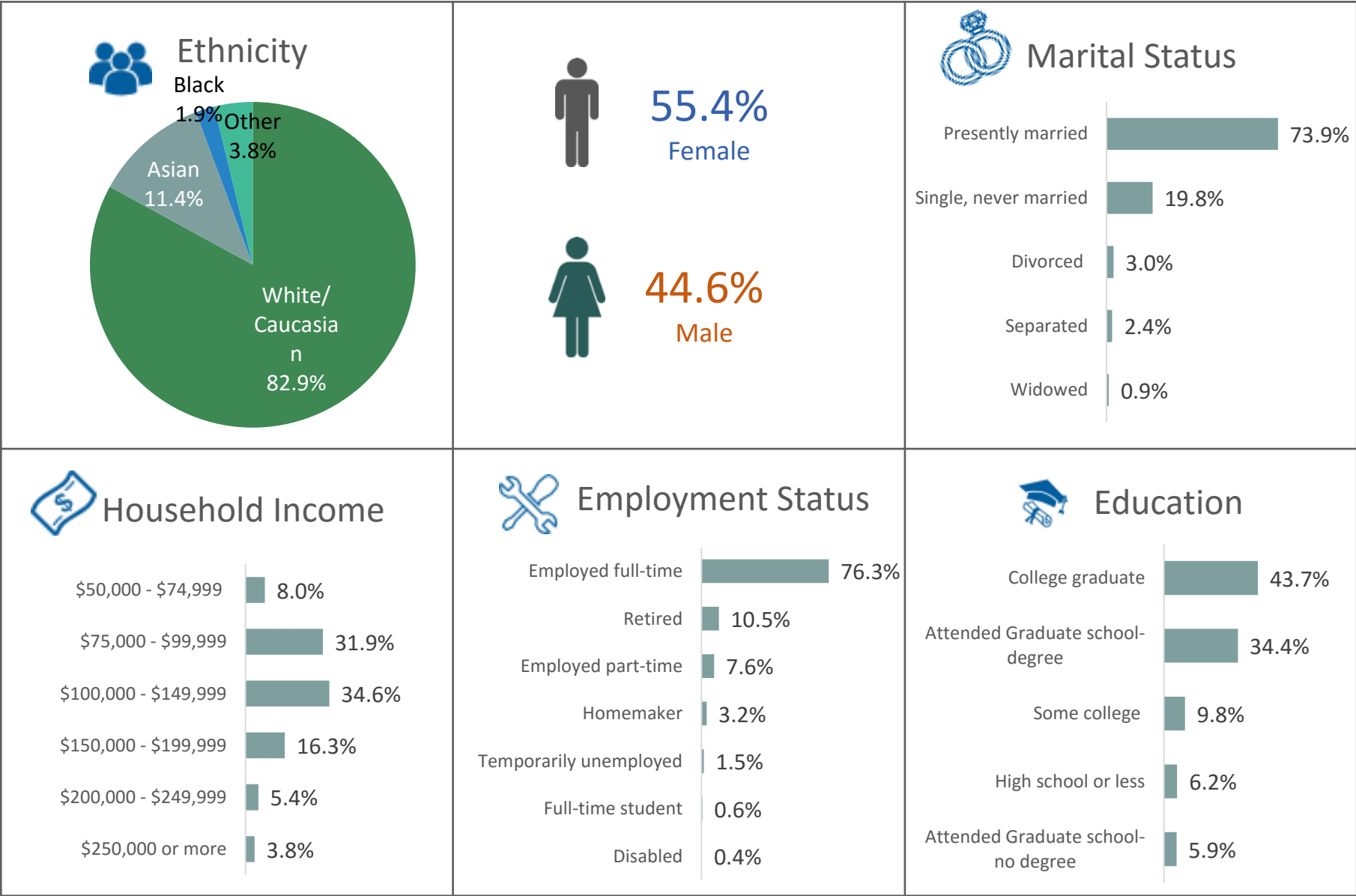
- To qualify for this study, respondents had to be ages 25-64.
- Respondents in this study represented all qualifying age groups and generational cohorts.



Demographics (cont.)

- A majority of respondents are employed full-time (76%), married (74%), and white (83%).
- Nearly half (44%) have a college degree and nearly as many have attended graduate school (40%).
- Statistically more men participated in this study than women.
- Two-thirds (66.5%) of respondents have a household income of \$75,000-\$149,999.

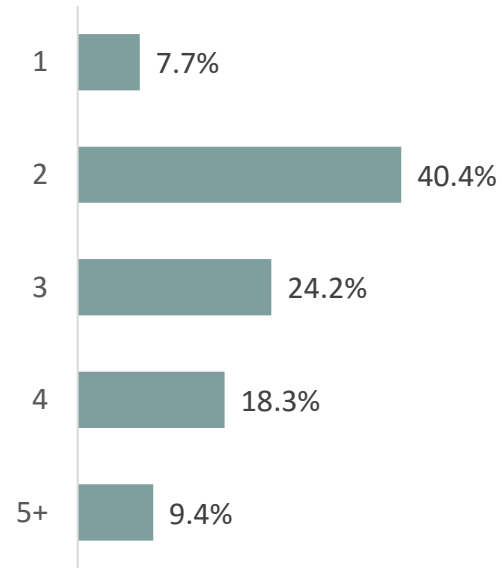
Respondent Profile Summary



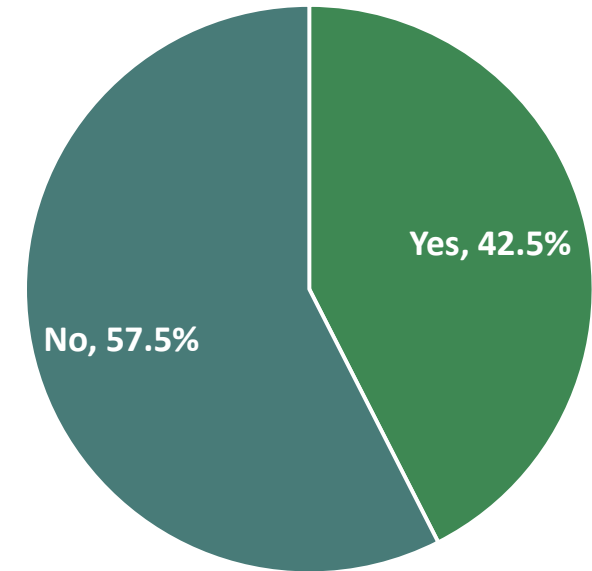
Demographics: Household Composition

- Four in ten respondents live in two-person households.
 - Most two-person households have no children present.
- More than half (52%) of respondents live in 3 or more person households.
- Fewer than half of households have children under 18 present (43%).

Number of people in household



Children Under 18 Present



Province & Segment

Province & Segment	New Brunswick n=61 (A)	NFL n=60 (B)	Nova Scotia n=81 (C)	Ontario n=490 (D)	Quebec n=300 (E)
Balanced Achievers	24.6%	21.7%	28.4%	40.4% ABC	42.0% ABC
Genuine Originals	44.3%	45.0% E	44.4% DE	32.0%	31.3%
Social Sophisticates	31.1%	33.3%	27.2%	27.6%	26.7%

- Balanced Achievers are over-represented in Ontario and Quebec compared to the other Provinces.
- There are more Genuine Originals in NFL and NS than in Quebec.
- Social Sophisticates are approximately equally distributed throughout the Eastern Provinces.

Messaging Impact – Verbiage Used In Questionnaire



Maine

P1 Interest Categories

- 16 interest categories were shown to respondents.
- Respondents who rated an interest category as a “must-have” (for an ideal vacation in Maine) were shown 3-5 specific interests/attractions/places/things to see/do related to that interest category and were asked which ones would make them more likely to visit Maine.

P1. Please rate each of the following interest areas/types of experiences as “Must have,” “Nice to have,” or “Not needed” for an ideal leisure trip/vacation/get-away to Maine
Festivals & Events (featuring local foods, local artisans, local vendors, hand-made crafts, internationally known artists & musicians, etc.)
Lakes & Waterways (fishing, fly-fishing, whitewater rafting, kayaking, canoeing, boating, wildlife viewing, nature, wilderness, etc.)
State & National Parks (36 state parks, 1 national forest, 1 national park, and 8 national wildlife refuges offer nature walks, hiking, backpacking, camping, birding, wildlife viewing, waterfalls, forests, foliage, unique plant life, wilderness, etc.)
History & Architecture (museums, old military outposts, historic forts, 19 th century architecture, maritime heritage, historical markers, border dispute zones, etc.)
Arts, Culture, & Heritage (Opera, theater, ballet, museums, sculpture, local artists, American artists, European masters, Native American culture, Franco American and Acadian culture)
Scenic Byways & Sightseeing (scenic drives, easily accessible look-out points and scenic vistas, natural landscapes featuring rivers, lakes, waterfalls, forests, flora, wildlife, mountains, coastline, botanical gardens, and ocean)
Trails (recreational trails for hiking, biking/mountain biking, snowmobiling, ATVing, Hut-to-Hut, etc.)
Shopping & Retail (outlet malls, indoor malls, home-grown brands like L.L. Bean and Tom’s of Maine, and local artisans offering their own hand-crafted wares)
Mountains & Peaks (over 70 mountains and peaks in the state - 14 of which have peaks over 1,200 meters, 420 km of the Appalachian mountain range are in Maine, there is skiing/snowboarding at Sunday River, Sugarloaf, and Camden Snow Bowl as well as hiking, zip-lining, and mountain biking)
Towns & Villages (historic ports, fishing villages, summer resort towns, sleepy seaside communities, inland towns and villages, cobblestone streets, big city nightlife)
Beaches (sandy beaches, sand dunes, ocean swimming, fresh water swimming, sun-bathing, shelling, surfing)
Lighthouses (60 lighthouses, including 18 th century and 19 th century lighthouses)
Wildlife Watching & Ocean Cruising (moose, puffins, whales & porpoises, eagles, National Historic Windjammer Cruises, lobster boats)
Craft Brewing, and Distilling (many craft breweries, craft distilleries, wineries, Maine Beer Trail, brewery tours, wine tastings, distillery tours)
Family Fun & Children’s Activities (aquarium, amusement parks, water park, roller coasters, water slides, mini-golf, go-karts, bumper boats, farms, children’s museum)
Unique Maine Foods (authentic, iconic, mouthwatering and classic foods endemic in the state of Maine’s culinary tradition)

P2 Specific Interests

In total there are 77 specific items in this question – most respondents did not see all of them.

P2. Now we're going to show you several specific examples of things to see and do that match the types of experiences you just indicated were "Must Haves" for you. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there. Check all that apply.

Festivals & Events

- Camden Windjammer Festival** - The Camden Windjammer Festival is the largest gathering of schooners on the East Coast and includes a Build-a-Boat Contest, Sea Dog show, pancake breakfast, chowder, and a fireworks show
- Maine International Film Festival**—10-day celebration of film presenting the very best of American independent and international cinema
- American Folk Festival**—features the nation's finest performing groups sharing the traditional arts of their region, culture and heritage on four stages along the Bangor waterfront
- Darling's Waterfront Pavilion**—this open-air amphitheater hosts internationally known artists like Jason Aldean, Def Leppard, Zac Brown Band, BB King, ZZ Top, Lady Antebellum, Miranda Lambert, Bob Dylan, Stone Temple Pilots and many more
- Pemaquid Oyster Festival** - features a great line-up of entertainment, food, educational exhibits and thousands of oysters fresh from the Damariscotta River

Lakes & Waterways

- Allagash Wilderness Waterway**—148km long, this uniquely northward river is a sportsman's paradise for anglers, paddlers and wildlife watchers
- Moosehead Lake**—at 64km long, it's Maine's largest body of water covered with coves, inlets, island and deep shorelines—great for sightseeing and angling
- Kennebec River**- with class II-IV rapids and huge waves at Big Mama and Whitewasher leading to an exciting plunge through Magic Falls, kayakers who enjoy playboating (or freestyle kayaking) will find plenty of holes to their liking between the dam at Harris Station and the village of West Forks
- Maine Island Trail**—America's first water trail designed to protect the fragile coastal environment and provide an organized recreational route for sea kayakers—it winds 603km through the Maine coast
- Fishing** – Maine's 6,000 lakes and ponds and endless coastal waterways offer abundant fishing whether traditional or fly fishing, fresh or salt water.

State & National Parks

- Grafton Notch State Park** – includes the Mahoosuc Mountain Range where Old Speck peaks at 1,274 meters, short and easy walks to impressive waterfalls and gorges, 19 of the most challenging kilometers of the Appalachian Trail, and some of the park's natural features are visible from the comfort of your car on the Grafton Notch Scenic Byway
- Baxter State Park**—over 84,984 hectares of wilderness including 46 peaks and ridges laced with 346km of hiking trails, it is home to rare alpine flowers, unique glacial formations, backcountry ponds and cascades
- Acadia National Park**—the only national park in all of New England, Acadia National Park offers unrivaled coastal beauty and activities for both leisurely hikers and adrenaline junkies
- Camden Hills State Park**—the park's signature scenic vista high atop Mt. Battie has sweeping views of Camden, Penobscot Bay, and surrounding islands
- Popham Beach**—one of Maine's rare geologic landforms on an otherwise craggy coastline is this long stretch of pristine and ever-changing sandy beach on the mouth of the Kennebec River

P2 Specific Interests (cont.)

P2. Now we're going to show you several specific examples of things to see and do that match the types of experiences you just indicated were "Must Haves" for you. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there. Check all that apply.

History & Architecture

- Hallowell Historic District** – settled in the 1760's, Hallowell grew to become a major port on the Kennebec River. One-half of the district's 450 buildings were built before 1865. Some of the more iconic buildings include the Hallowell Cotton Mill, Gage Row House, Governor Joseph R. Bodwell House, Gaslight Theater, Dr. John Hubbard Office Museum
- Maine State House / The Maine State Museum**—built by America's first native-born architect, Charles Bullfinch, and constructed of Maine granite, the 54 meter dome of the state house is one of the most distinguishing architectural features of the capital city of Augusta—it's adjacent to the Maine State Museum
- Roosevelt Campobello International Park**—located on Campobello Island in New Brunswick, and home of Franklin and Eleanor Roosevelt's summer house, it is a beacon of international cooperation as it's jointly administered by the people of the U.S. and Canada
- Maine Maritime Museum**—an 8-hectare campus that includes the only intact historic U.S. shipyard, a working Boatshop that keeps traditional wooden boatbuilding alive, daily lighthouse cruises, trolley tours, a pirate ship for children to play on, and more
- Fort Knox and Penobscot Narrows Bridge Observatory**—now a state historic site, the fort was initially constructed to fight the British in the War of 1812; the adjacent cable-stay bridge has 42-story pylons modeled after the Washington Monument that include an observatory atop the northern pylon with 360-degree views of Maine's beautiful landscape

Arts, Culture & Heritage

- Langlais Sculpture Tour** – in the heart of Kennebec Valley indoor and outdoor sculpture are served up by three charming and diverse towns: Augusta (largest outdoor sculpture collection in Maine), Waterville (a wild and beautiful art collection that reflects the history and diversity of its artistic residents), and Skowhegan (featuring the world's tallest Indian, standing 19 meters tall, modeled after the area's original inhabitants, the Wabanaki)
- Center of Maine Contemporary Art** – founded in 1952, the Center seeks to be a catalyst in stimulating the arts across the state by featuring works of professional artists with ties to Maine. Experience the Center's newly built, glass enclosed exhibition space that opened in June, 2016
- Portland Stage** – Maine's largest, fully professional, non-profit theater produces a season of 7 shows that play to over 50,000 people annually
- Franco-American Heritage**— a strong influence today in local culture because Franco-Americans are the largest ethnic group in Maine—you can experience it throughout the state at festivals like La Kermesse, Franco American Festival, Festival Franco Fun, and Le Festivale de la Bastille
- Wabanaki Heritage**—the Wabanaki, or People of the Dawn, called Maine home long before explorers did. You can immerse yourself in Maine's Native American culture by attending festivals like the Native American Festival and Basketmakers Sale and Demonstration, which feature basket-making, singing, drumming and storytelling

Mountains & Peaks

- Mt. Katahdin**—the highest mountain in Maine at 1,606 meters and the northern terminus of the Appalachian Trail
- Mt. Kineo**—containing the largest deposit of rhyolite in North America which early Natives used to make arrowheads and tools, it offers spectacular 360-degree views from an old converted fire tower platform
- Cadillac Mountain**—the tallest mountain on Mount Desert Island (the largest island in Maine) and the highest point along the North Atlantic seaboard, it's the first place to view a sunrise in the U.S.
- Maine's High Peaks** – the state of Maine has 14 mountains with elevation over 1,200 meters and two of them, Sugarloaf and Saddleback, offer skiing and snowboarding during the winter

P2 Specific Interests (cont.)

P2. Now we're going to show you several specific examples of things to see and do that match the types of experiences you just indicated were "Must Haves" for you. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there. Check all that apply.

Scenic Byways & Sightseeing

- Old Canada Road Scenic Byway**—Route 201 is a National Scenic Byway, one of less than 100 roads in the country chosen for its spectacular scenery – curving back and forth with the Kennebec River, the landscape is full with views of forests, mountains, and the river including Moxie Falls with a spectacular near 30-meter drop, it is Maine's highest and most easily accessible waterfall
- Monhegan Island** – 1.6 square kilometers in area, 16km from the mainland, only accessible by boat, there are no paved roads and no cars allowed on the island. Monhegan Island is home to a lighthouse and an artists' colony and offers an unhurried pace of life for artists and visitors seeking solitude and beautiful wilderness
- Bold Coast Scenic Byway** – a 200km scenic route running between Canada and Maine along the Narragus River, the Atlantic Coast, through blueberry country, past the Moosehorn National Wildlife Refuge, and past charming and historic villages
- Coastal Maine Botanical Gardens**—Ranked the #1 public garden by TripAdvisor, it includes 110 hectares of tidal shore, hiking trails, and a sculpture garden
- Rangeley Lakes Scenic Byway** – this drive follows Routes 17 and 4 around Rangeley Lake, along the Appalachian Mountains, and offers breathtaking views of Mooselookmeguntic and Upper Richardson Lakes

Trails

- Appalachian Trail** – 420 km of the trail's 3,476 km are in Maine, sections of the trail range from easy to difficult, the trail can be accessed from numerous parks in Maine for short day-hikes or longer overnight hikes, and campsites are spaced 24km to 32km apart along the trail
- Interconnected Trail System**—Over 3700km of snowmobile trails
- Carrabassett Trail System**—over 160km of connected trails for mountain biking enthusiasts looking for diverse terrain
- Huts & Trails**—a world-class system of backcountry trails and eco-lodges, featuring winding switchbacks, sandy paths along mountain streams, natural bridges and incredible views
- East Coast Greenway** – one of the country's most ambitious urban recreational trails at 4,800km, it links Canada to Key West, Florida and runs along the Atlantic Ocean

Shopping & Retail

- Bangor Mall & The Maine Mall** —Bangor Mall has over 80 stores and is the only enclosed regional mall within the top two-thirds of Maine and the Eastern Canadian provinces; The Maine Mall is in South Portland and features 120 stores and dining options
- L.L. Bean**—the flagship store in Freeport is open 24x7x365; the L.L. Bean Outdoor Discovery School teaches archery, stand-up paddle board, fly fishing and kayaking
- Kittery Shopping Outlets**—over 120 famous name outlet stores including Coach, Gap, Loft, Crate & Barrel, Eddie Bauer, Lululemon, Nike, Under Armour and the famous Kittery Trading Post
- Uniquely Maine** – while shopping in Maine, keep an eye out for uniquely Maine-made treasures by local artisans such as local ceramics created from the rich clay of Maine, a jacket to keep warm while skiing, a hand-hewn board for surfing the waves, even a wallet or bag made from recycled sailcloth
- Center for Maine Craft** – Maine's central location for craft sales, education, and activities; as many as 300 Maine craft artists from throughout the state may be represented at the center at any given time

P2 Specific Interests (cont.)

P2. Now we're going to show you several specific examples of things to see and do that match the types of experiences you just indicated were "Must Haves" for you. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there. Check all that apply.

Towns & Villages

- Bar Harbor**—one of Maine's most popular cities to visit, it was New England's premier summer resort town in the 19th century and home to summer estates for some of America's richest and powerful families, including the Rockefellers, Fords, and Vanderbilts
- Portland's Waterfront**—a unique and inviting blend of bustling piers of The Old Port, quaint cobblestone charm, and big city nightlife
- Bethel** - Situated between the White Mountain National Forest to the south and Maine's tallest mountains to the north, Bethel is the starting point for bicycle, automobile and hiking tour loops
- Presque Isle** - Presque Isle is the largest city in Aroostook County, Maine's northernmost county. The city is also the starting point for the world's largest scale model of the solar system and serves as the ideal home base to go snowmobiling, hunting, fishing, hiking or mountain biking
- Camden** – home to the Windjammer Festival where you can explore historic sail-powered schooners; hike 48km of trails or camp at one of 100 campsites in Camden Hills State Park; and at the Camden Snow Bowl you snow tube, ice skate, or toboggan down a 122 meter chute

Beaches

- Ogunquit Beach**—rated one of the Top 25 Beaches by TripAdvisor, this 5.6km peninsula of sandy beach forms a natural barrier between the Atlantic Ocean and the Ogunquit River and offers bodysurfing, chair and umbrella rentals, and endless seashell and driftwood treasure hunting
- Old Orchard Beach**— 11km of sandy beach, a century-old pier and an oceanfront amusement park, surrounded by shopping, dining, fishing, camping, saltwater marsh canoeing and nightly entertainment
- Higgins Beach** – near the mouth of the Spurwink River, the warm waters here make this white sand beach popular for board and bodysurfing, swimming, and kayaking.
- Reid State Park** – adorned with long, wide sand beaches that are both recreational and essential nesting areas for endangered least terns and piping plovers; you'll also find large sand dunes which are extremely rare in Maine
- Sebago Lake State Park** – nestled in the foothills of the White Mountains, Sebago Lake is Maine's deepest, second largest, and one of its purist. It offers sandy beaches on an inland, freshwater lake with mesmerizing water clarity.

Lighthouses

- West Quoddy Lighthouse**—on the easternmost point of the contiguous U.S., built in 1858, with distinctive red-and-white stripes, it remains an active aid to ship navigation through the Quoddy Narrows
- Pemaquid Point Light**—built in 1827, the station sits on a sloping, rocky promontory with ridges carved out by the sea, and its original Fresnel lens is still in use
- Portland Head Light**—commissioned by George Washington, it is Maine's oldest lighthouse, first built in 1791
- Cape Neddick "Nubble" Light**—built in 1879 on a tiny off-shore island or "nubble" it features a Victorian keeper's house with gingerbread trim and a ladder with miniature cast-iron lighthouses on its railing—making it one of the most often photographed lighthouses
- Bass Harbor Light** - Built in 1858, the Bass Harbor Head is one of the most frequently photographed Maine lights. It sits atop a rugged, pink rock cliff surrounded by dark evergreens. Located on the southern end of Mt. Desert Island, it's a cylindrical tower attached to the keeper's house by a short, enclosed passageway

P2 Specific Interests (cont.)

P2. Now we're going to show you several specific examples of things to see and do that match the types of experiences you just indicated were "Must Haves" for you. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there. Check all that apply.

Wildlife Watching/Ocean Cruising

- Boothbay Harbor**—the largest boating harbor north of Boston, you can take a cruise with a local captain, see lighthouses, puffins, whales and assorted seal life, with panoramic ocean vistas—or learn how to harvest Maine lobster
- Windjammer Cruises**—all-inclusive cruises on wooden sailing schooners, seven of which are designated as National Historic Landmarks, get you up-close to breathtaking wildlife like whales, eagles and porpoises, some of North America's most spectacular coastal scenery, and charming villages and unspoiled islands
- Lobster Boat Tours** – jump on board a lobster boat tour where you can join in on the adventure of catching lobster while learning how to tell if a lobster is male or female, the difference between hard and soft-shell lobster, and how to measure a lobster
- Atlantic Puffins** – Maine ocean islands provide the only nesting sites for Atlantic puffins in the United States – providing coastal habitat for more than 4,000 each summer. View puffins from a tour boat or close range behind blinds on Machias Seal Island, and stop in the Project Puffin Visitor Center in Rockland for hands-on exhibits
- Maine Birding Trail** – offers brochures, maps, and guides for exploring 620km of trails great for spotting some of the 330 bird species that can be found in Maine including Atlantic Puffins, Bald Eagles, Harlequin Duck, Razorbills, Arctic Terns, and many more

Craft Brewing, and Distilling

- Craft Brewing** – Partake in Maine's craft brew scene by touring one of its 50 breweries like Allagash, D.L. Geary Brewing Company, Oxbow Brewery, or Baxter Brewing Company
- Maine Beer Trail Passport**— Maine has around 50 breweries crafting hundreds of unique beers all connected by the Maine Beer Trail. With a Maine Beer Trail Passport you'll be awarded a Brewer's Guild hat after visiting 10 breweries; a t-shirt after 20 breweries
- Distilleries & Wineries** – tour some of Maine's craft distilleries and wineries like Maine Distilleries (Cold River Vodka, Cold River Blueberry Vodka, Cold River Gin) or Bartlett Winery

Family Fun & Children's Activities

- Maine Wildlife Park** - Owned and operated by the Maine Department of Inland Fisheries and Wildlife, this is a guaranteed opportunity to see a moose; plus white-tailed deer, black bears, bald eagles, mountain lions, porcupines, coyotes, hawks, owls, turtles, trophy trout, and more - over 30 species of native wildlife
- Palace Playland**—New England's largest beachfront amusement park with roller coasters, carnival games, water slides and Maine's largest arcade
- Funtown Splashtown USA**—New England's longest, tallest log-flume ride and the region's largest wooden roller coaster
- Aquaboggan Water Park**—100,260 cubic foot wave pool, water slides, bumper boats, go-karts and mini-golf
- Seacoast Adventure**—30 meter long Sky Swing, go-karts, slingshot trampoline, Ferris wheel, climbing wall, and mini-golf

P2 Specific Interests (cont.)

P2. Now we're going to show you several specific examples of things to see and do that match the types of experiences you just indicated were "Must Haves" for you. From the list below, please check the items that would make you more likely to visit Maine for a leisure or getaway trip if you knew they were available there. Check all that apply.

Unique Maine Foods

- Maine Foodie Tours** – this culinary tour curates classic Maine, and eclectic tasting experiences, that feature some favorite, local culinary artists including: chefs, cheesemongers, gourmet spice merchants, bakers, confectioners, mixologists, brewers and more
- Iconic Maine**—The lobster roll, whoopee pie (the official state treat), wild blueberries, maple syrup, a can of Moxie (perhaps the most debated of Maine's delicacies), the ploye (not quite bread, not exactly a pancake, and not completely a crepe), fiddleheads (as a side or sautéed and served up on their own, these wild-growing plants are the quintessential Maine find)
- Chocolatiers** – experience one of Maine's many chocolate confectioneries like Haven's Candies which offers guided factory tours, Dean's Sweets and Bayside Chocolates who source ingredients locally, and Black Dinah which was a semi-finalist in the prestigious James Beard Foundation Restaurant and Chef Awards.
- Pineland Farms** – an agricultural destination complete with lodging, 30km of recreational trails, educational demonstrations on sustainable farming and cheese making, farm animals that children can see and learn about, and a market selling produce, cheese, and meats fresh from the farm
- Machias Blueberry Festival**—Machias, known as the Blueberry Capital of the World since 95% of the world's blueberry crop is harvested here, hosts this festival which includes a blueberry pie-eating contest, the annual Blueberry Musical, and a craft fair

Websites Visited Regularly



Maine

Websites Visited Regularly

Internet sites	First Mention	Total Mention
MISCELLANEOUS SITES	24.1%	40.5%
CBC (Canadian Broadcasting Corporation)	7.0%	12.3%
Yahoo!	4.5%	9.2%
MSN	4.3%	6.8%
CTV	1.7%	2.6%
Netflix	0.7%	0.8%
TVA	0.7%	2.5%
RDS	0.6%	1.5%
IGN	0.4%	0.4%
Canoe	0.4%	1.1%
IMDB (The Internet Movie Database)	0.3%	0.7%
Various shopping sites	0.3%	0.7%
Various financial sites	0.3%	0.6%
Wikipedia	0.3%	0.7%
State websites	0.2%	0.2%
People.com	0.2%	1.1%
Various stock related sites	0.2%	0.2%
BuzzFeed	0.2%	0.7%
CAA (Canadian Automobile Association)	0.1%	0.7%
Indigo	0.1%	0.5%
CP24	0.1%	0.4%
Discovery	0.1%	0.4%
Sympatico	0.1%	0.4%
Local newspaper	0.1%	0.4%
Indeed	0.1%	0.3%
Pokemon Go	0.1%	0.2%
Soccer	0.1%	0.1%
Bloomberg	0.1%	0.3%
LCN	0.1%	0.4%
Kijiji	0.1%	1.0%
BabyCenter	0.1%	0.1%

Internet sites	First Mention	Total Mention
CBS	0.1%	0.3%
Various Banking Sites	0.0%	0.6%
Various art sites	0.0%	0.4%
Realtor.ca	0.0%	0.2%
Jezbel	0.0%	0.3%
Carnival cruise lines	0.0%	0.4%
Disney	0.0%	0.2%
Canadian Living	0.0%	0.1%
Yelp	0.0%	0.3%
ABC/American Broadcasting Company	0.0%	0.2%
Mountain Equipment Co0.0%op	0.0%	0.3%
Québec Concours	0.0%	0.3%
TV Line	0.0%	0.3%
Cracked	0.0%	0.3%
Perez Hilton	0.0%	0.3%
Pogo	0.0%	0.3%
Meteomedia	0.0%	0.1%
Music sites	0.0%	0.2%
Various health and wellness sites	0.0%	0.4%
Various online poker sites	0.0%	0.3%
Various beauty sites	0.0%	0.1%
TRAVEL SITES	19.5%	28.1%
Trip advisor	8.8%	13.9%
Other travel sites mentions	3.6%	7.8%
Expedia	2.4%	5.2%
Trivago	0.7%	1.1%
Travelocity	0.6%	1.9%
Travel zoo	0.4%	0.7%
Various hotels site	0.4%	1.5%
Cruise Critic	0.3%	0.9%
Ticket Master	0.3%	0.3%

Websites Visited Regularly (cont.)

Internet sites	First Mention	Total Mention
Sunwing	0.3%	0.5%
Voyage à rabais	0.3%	0.5%
Routard	0.3%	0.3%
Tourist/travel agencies	0.3%	0.4%
Hilton	0.1%	0.2%
Lonely Planet	0.1%	0.4%
Booking.com	0.1%	0.4%
Air Canada	0.1%	0.4%
Quoi faire aujourd'hui	0.1%	0.3%
Tourist Office	0.1%	0.4%
Kayak	0.1%	0.3%
iTravel 2000	0.1%	0.3%
Redtag	0.0%	0.3%
Air Transat	0.0%	0.4%
Vacations to go	0.0%	0.3%
Fodors	0.0%	0.3%
Orbitz	0.0%	0.3%
SellOffVacations	0.0%	0.1%
Voyage bergeron	0.0%	0.3%
Vacances Transat	0.0%	0.3%
Hotels.com	0.0%	0.2%
Voyage Forum	0.0%	0.3%
Air Canada vacations	0.0%	0.2%
NEWS SITES	17.3%	29.2%
CNN	3.9%	8.0%
Other news sites mentions	2.2%	5.8%
La Presse	1.9%	3.7%
Google news	1.3%	2.1%
The Globe & Mail	1.2%	3.3%
Toronto star/star.com	1.1%	3.4%
BBC	1.0%	2.7%

Internet sites	First Mention	Total Mention
TMZ	0.9%	1.3%
Huffington Post	0.8%	2.0%
680 news	0.5%	0.7%
Daily Mail	0.4%	0.5%
CNBC	0.3%	0.3%
CNET	0.3%	0.3%
Slashdot	0.3%	0.3%
Entertainment Tonight	0.2%	0.7%
NY Times (The New York Times)	0.2%	0.8%
The Guardian	0.2%	0.6%
Toronto Sun	0.1%	0.4%
Global News	0.1%	0.4%
USA TODAY	0.1%	0.5%
Fox News	0.1%	0.3%
The Chronicle Herald	0.1%	0.3%
National Post	0.0%	0.4%
Le Devoir	0.0%	0.4%
MSNBC	0.0%	0.3%
Washington Post	0.0%	0.2%
The Telegram	0.0%	0.1%
Euro news	0.0%	0.3%
SEARCH ENGINE	13.1%	19.2%
Google/Google search	12.9%	18.9%
Other search engine mentions	0.1%	0.4%
Bing	0.1%	0.3%
SOCIAL MEDIA SITES	4.8%	10.7%
Facebook	2.1%	2.8%
YouTube	1.6%	5.6%
Pinterest	0.8%	2.0%
Reddit	0.3%	0.5%
LinkedIn	0.0%	0.3%

Websites Visited Regularly (cont.)

Internet sites	First Mention	Total Mention
Other social media sites mentions	0.0%	0.3%
SPORTS SITES	2.2%	6.9%
TSN (The Sports Network)	0.7%	2.2%
Sportsnet	0.4%	1.7%
ESPN	0.3%	2.1%
NHL (National Hockey League)	0.3%	0.6%
Other sports sites mentions	0.3%	1.2%
NFL (National Football League)	0.1%	0.3%
MLB (Major League Baseball)	0.0%	0.4%
PGA (Professional Golfers' Association)	0.0%	0.4%
DansLesCoulisses	0.0%	0.3%
E-COMMERCE SITES	1.7%	4.6%
Amazon	1.0%	2.9%
Ebay	0.6%	2.0%
Etsy	0.1%	0.5%
Other e0.0%commerce sites mentions	0.0%	0.2%
WEATHER SITES	1.4%	4.1%
The Weather network	1.0%	2.5%
Other weather forecasting sites	0.3%	0.6%
The weather Channel	0.1%	0.9%
Environment Canada	0.0%	0.1%
ONLINE REWARD SITES	1.3%	3.2%
Swagbucks	0.3%	0.8%
Other online reward sites mentions	0.3%	0.7%
RedFlagDeals	0.3%	0.4%
Smart Canucks	0.1%	0.3%
Air Miles	0.1%	0.8%
Groupon	0.1%	0.4%
MAGAZINE SITES	0.4%	1.1%
Other magazine sites	0.3%	0.5%
Flipboard	0.1%	0.3%

Internet sites	First Mention	Total Mention
Cottage Life	0.0%	0.3%
GAMING SITES	0.4%	1.4%
Battle.net	0.3%	0.3%
Other video games site	0.1%	0.3%
Other online gaming sites	0.0%	0.8%
RADIO SITES	0.3%	0.8%
Other radio sites mentions	0.2%	0.6%
VOCM (Voice of the Common Man)	0.1%	0.3%
MAIL SITES	0.2%	1.9%
Hotmail	0.1%	1.2%
Email	0.1%	0.3%
Gmail	0.0%	0.3%
Outlook	0.0%	0.3%
RETAILER SITES	0.2%	1.0%
Other retailer sites mentions	0.2%	0.8%
Walmart	0.0%	0.1%
Toys "R" Us	0.0%	0.2%
REAL ESTATE SITES	0.1%	0.6%
MLS (Multiple listing service)	0.1%	0.3%
Other real estate sites	0.0%	0.3%
RECIPE SITES	0.1%	1.1%
Other cooking/recipe sites	0.1%	0.9%
All recipes	0.0%	0.2%
CLOTHING SITES	0.1%	0.5%
Other clothing sites mentions	0.1%	0.5%
Other	6.3%	17.9%
NA/Nothing	4.7%	4.7%
Don't Know	1.9%	1.7%

Magazines Read Regularly



Maine

Magazines Read Regularly

Magazines	First Mention	Total Mention
MISCELLANEOUS MAGAZINE	13.1%	23.7%
Toronto life	2.9%	5.5%
Readers Digest	1.8%	3.1%
Cottage Life	1.6%	1.9%
Coup de pouce	1.3%	2.2%
Discover	1.1%	1.1%
Explore	0.7%	1.1%
Zoomer	0.6%	1.6%
7 jours	0.6%	0.6%
Geo plein air	0.5%	0.5%
New Yorker	0.3%	1.1%
Essence	0.3%	0.6%
The Walrus	0.3%	0.6%
Popular science	0.3%	0.6%
Protégez-vous	0.3%	1.9%
Various space magazine mentions	0.3%	0.8%
Saltscapes	0.1%	0.6%
Consumer Reports	0.0%	0.7%
Model Railroader	0.0%	0.3%
Ottawa	0.0%	0.6%
Various foreign affairs/policy magazine	0.0%	1.0%
TRAVEL MAGAZINE	12.0%	18.8%
Travel magazine	4.1%	5.4%
Other travel magazine mentions	2.7%	4.4%
Conde Nast Traveler	2.2%	3.6%
Travel and leisure	1.7%	4.4%
Enroute	0.6%	1.1%
Traveler	0.3%	0.6%
Railways/trains	0.3%	0.3%
Lonely planet	0.0%	0.6%
Voyage	0.0%	0.6%

Magazines	First Mention	Total Mention
NEWS/CURRENT AFFAIRS MAGAZINE	11.4%	19.0%
Macleans	5.4%	9.6%
L'actualité	2.8%	3.2%
Time	2.2%	5.7%
Other news/current affairs magazine mentions	0.6%	2.4%
New York Times	0.3%	1.0%
Newsweek	0.0%	0.7%
LIFESTYLE MAGAZINE	9.5%	14.8%
Chatelaine	4.6%	8.5%
Canadian Living	3.7%	7.3%
Other lifestyle magazine mentions	1.1%	2.1%
Country living	0.1%	0.5%
Down home	0.0%	0.2%
FASHION/BEAUTY MAGAZINE	7.1%	13.2%
Cosmopolitan	1.1%	3.1%
Vogue	1.0%	3.7%
Harpers Bazaar	1.0%	1.3%
Esquire	0.6%	1.1%
GQ	0.6%	1.0%
Elle	0.6%	1.9%
Loulou	0.6%	1.0%
Vanity Fair	0.3%	1.0%
Flare	0.3%	0.6%
In style	0.3%	0.6%
Other fashion magazine mentions	0.3%	1.3%
Hello	0.1%	0.4%
CELEBRITY GOSSIP/ENTERTAINMENT MAGAZINE	6.6%	14.2%
People	3.7%	9.0%
Entertainment Weekly	1.1%	1.7%
US Weekly	0.5%	2.3%
Oprah	0.4%	0.7%

Magazines Read Regularly (cont.)

Magazines	First Mention	Total Mention
Rolling Stone	0.3%	1.0%
Star	0.3%	0.6%
Other celebrity gossip/entertainment magazine	0.3%	1.3%
In touch	0.0%	0.6%
Star système	0.0%	0.6%
CAR MAGAZINE	5.1%	8.2%
CAA magazine	4.2%	6.8%
Other car magazine mentions	1.0%	1.1%
Car and driver	0.0%	0.6%
GEOGRAPHIC MAGAZINE	5.0%	11.0%
National geographic	4.1%	9.1%
Canadian geographic	0.6%	2.2%
Géo	0.3%	0.6%
BUSINESS/FINANCE MAGAZINE	5.0%	10.2%
Other business/finance magazine	1.8%	3.1%
The Economist	1.6%	2.8%
Money sense	1.3%	3.1%
ROB/Report On Business	0.3%	1.3%
Les Affaires	0.0%	0.9%
Canadian Business	0.0%	0.6%
COOKING/RECIPES MAGAZINE	3.2%	7.5%
Food Network	1.0%	1.9%
Food and drink	0.6%	1.0%
Other cooking/recipes magazine	0.6%	1.7%
Ricardo	0.6%	1.3%
Food & Wine	0.3%	1.0%
Bon Appetit	0.0%	1.1%
Rachael Ray	0.0%	0.5%
Saveur	0.0%	0.4%
SPORTS/ACTIVITIES MAGAZINE	2.7%	6.9%
Other sports/activities magazine	1.0%	1.3%
Golf Digest	0.8%	1.1%

Magazines	First Mention	Total Mention
Hockey news	0.5%	1.0%
Sports illustrated	0.4%	1.0%
Sportsnet	0.0%	1.2%
Runners world	0.0%	0.6%
Other sports magazine	0.0%	1.4%
HOME/DECOR MAGAZINE	2.6%	7.2%
House and home	1.0%	2.6%
Style at home	1.0%	2.3%
Chez soi	0.3%	0.6%
Other home/décor magazine mentions	0.3%	3.7%
Decormag	0.0%	0.6%
HEALTH/FITNEES MAGAZINE	1.7%	4.9%
Women health	1.1%	1.2%
Men's Health	0.5%	2.0%
Woman's World	0.1%	0.5%
Other health/fitness magazine mentions	0.0%	1.4%
WOMEN'S MAGAZINE	1.6%	3.3%
Other women magazine mentions	1.3%	1.9%
Good Housekeeping	0.3%	0.4%
Best	0.0%	0.6%
Woman's Day	0.0%	0.6%
SCIENCE/TECHNOLOGY MAGAZINE	1.1%	2.1%
Other science/technology magazine mentions	0.8%	1.7%
Scientific American	0.3%	0.4%
FAMILY/PARENTING MAGAZINE	0.4%	2.2%
Parents	0.3%	1.6%
Todays Parent	0.1%	0.6%
Other family/parenting magazine mentions	0.0%	0.6%
Other	4.9%	10.0%
NA/Nothing	5.2%	5.2%
Don't Know	1.7%	0.9%