



Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report



Prepared by



March 2017

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Research Objectives and Methodology

Methodology

- This report outlines results from Calendar Year 2016, with travel occurring between December 2015 and November 2016.
- Data collection occurred monthly between January 5 and December 20, 2016. The number of completed surveys collected for each research component are as follows:

Research Component	Completed Surveys
Overnight Visitor Survey	2,909
Day Visitor Survey	1,762
National Omnibus Survey	21,910

- Throughout this report, the acronym VFR stands for “visiting friends or relatives.”
- *Statistical significance between subgroups was calculated at the 95% confidence level and is noted throughout by <> or a/b/c/etc.*
- *A statistically significant **increase** from the previous year is indicated throughout by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.*

Research Objectives

Three distinct online surveys are used to accomplish the five primary goals of this visitor tracking research.

Research Objectives	Survey Instruments		
	National Omnibus	Overnight Visitor	Day Visitor
Identify Maine's share of the U.S. travel market	✓		
Estimate the number of visitors who come to Maine	✓	✓	✓
Provide a profile of Maine visitors		✓	✓
Estimate the amount of spending devoted to tourism in Maine		✓	✓
Determine the Maine traveler's level of satisfaction and view of Maine		✓	✓

Description of Survey Instruments

National Omnibus Survey

- Nationally-representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine's borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

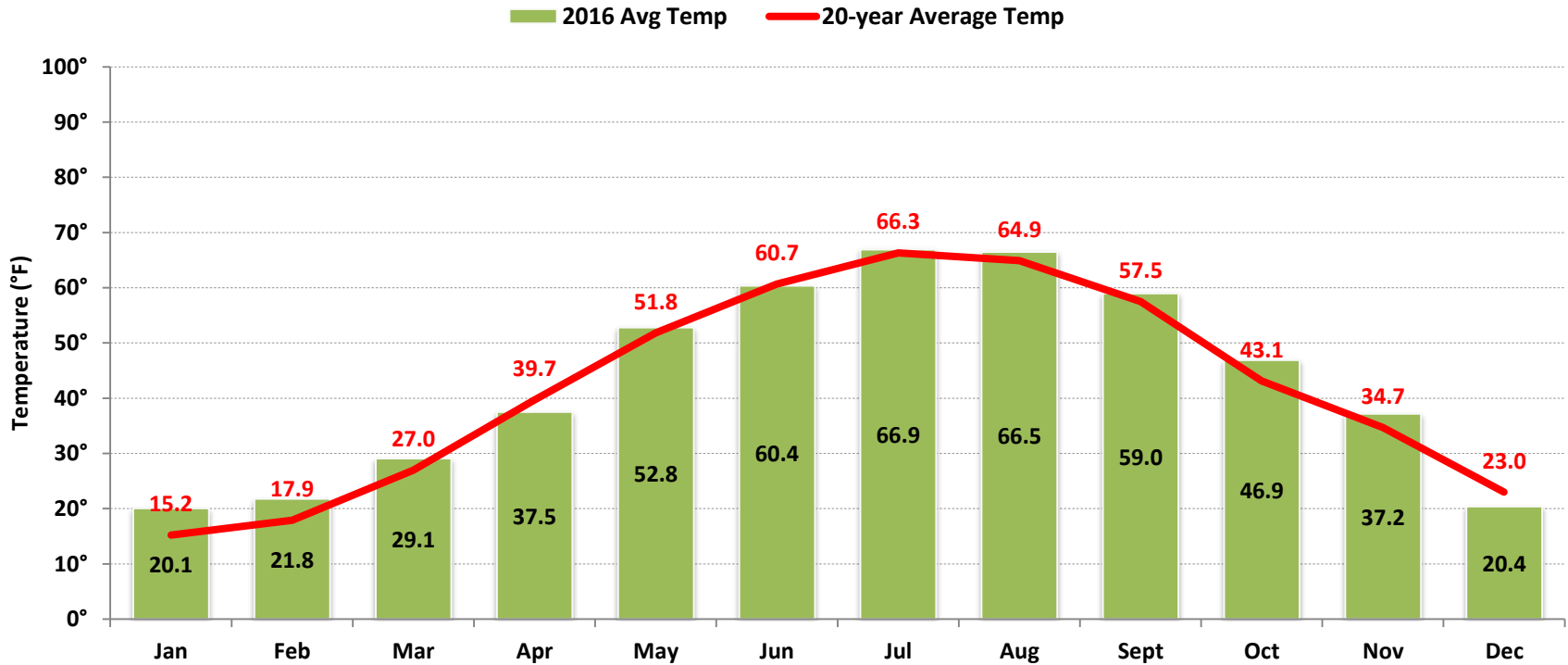
2016 in Context

2016 brought a favorable economic outlook for the United States, leading to an increased desire to travel.

- The stock market had a great year, with all major indices posting strong gains over 2015 (Dow: 13.4%, S&P: 9.5%, and Nasdaq: 7.5%).
- Gas prices remained low. The national average price of a gallon of gas was below \$2.50 for all of 2016 and even dipped below \$2 at the start of the year (AAA).
- Airfares dropped in 2016, making air travel more affordable. The average price of a flight in 2016 was 14% lower than in 2014 (Hopper).
- Home loan rates dropped significantly, with the average 30-year fixed rate mortgage at 3.79% (Bankrate.com). In comparison, the average 30-year fixed rate was 4.30% in 2014 and 3.99% in 2015.

Maine experienced average temperatures through most of 2016, with temperatures slightly above average for the first quarter and slightly below average in December.

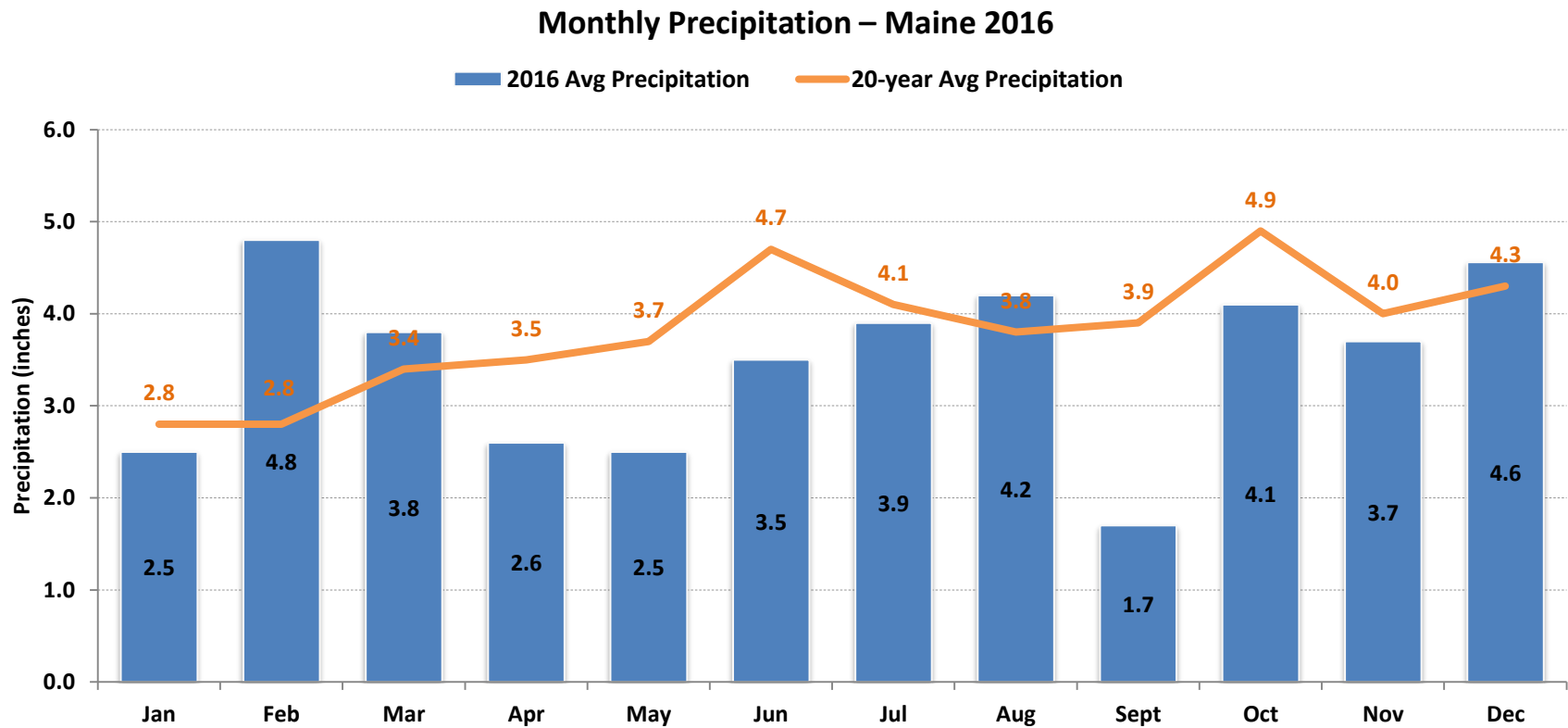
Average Monthly Temperature – Maine 2016



Data source: NOAA.gov

Precipitation in Maine varied from the 20-year average during most of 2016.

- 2016 brought higher than normal amounts of precipitation in February, March, August, and December, and lower than average amounts for most of the remaining months (especially September).

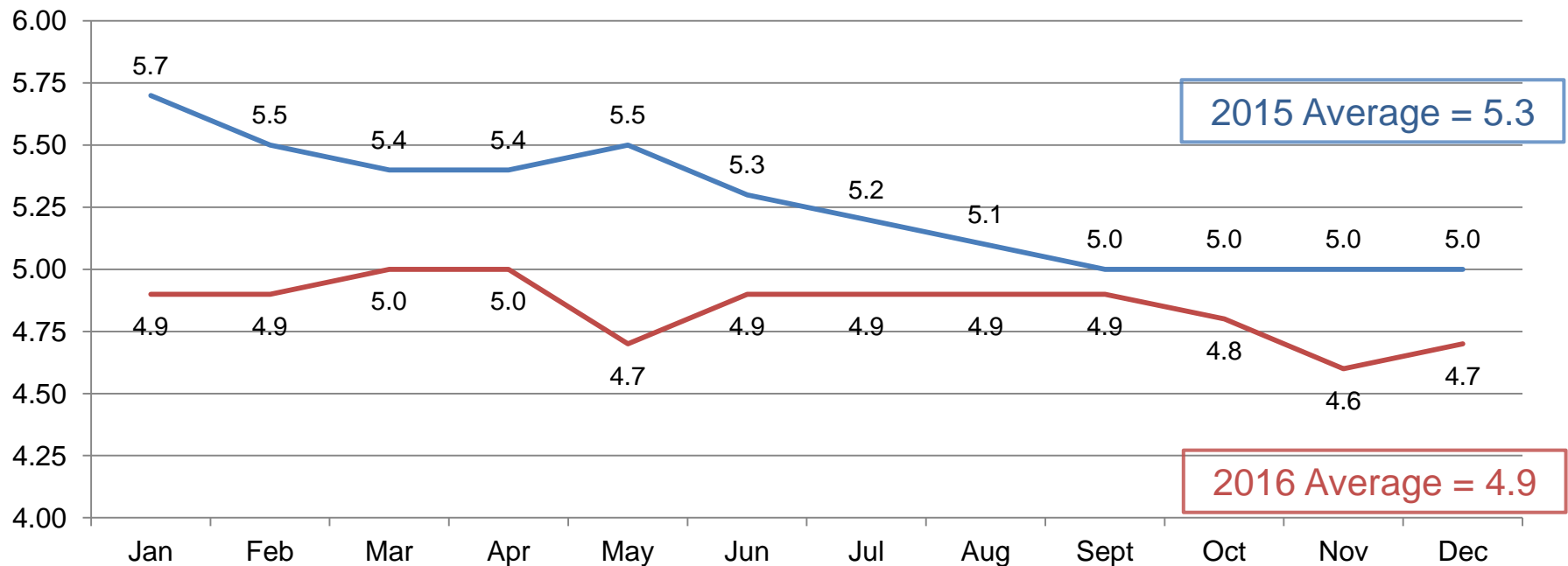


Data source: NOAA.gov

In 2016, the unemployment rate fell to its lowest level since 2009.

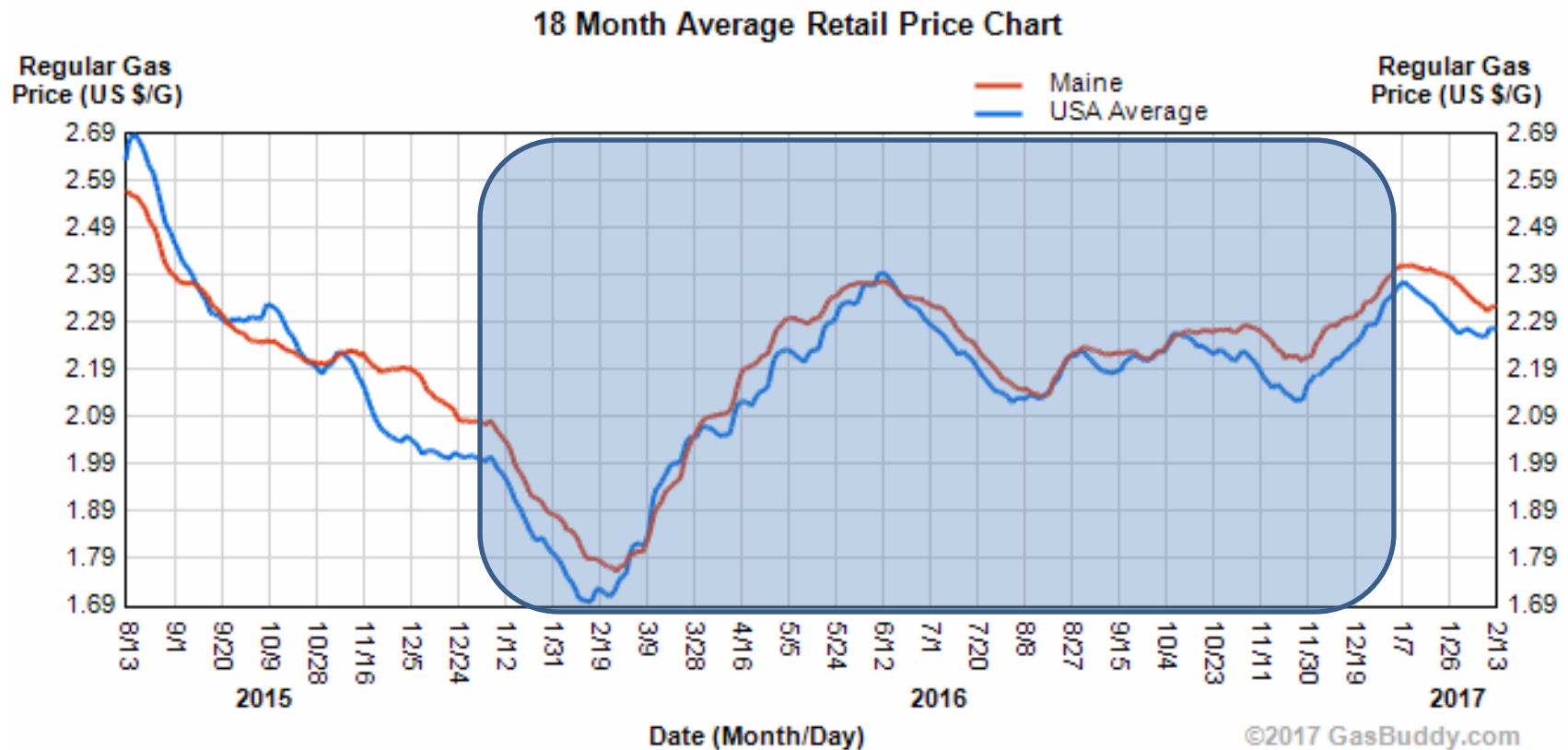
- The unemployment rate was lower in each month of 2016 than corresponding months the year before.

**United States Unemployment Rate by Month
2015-2016**

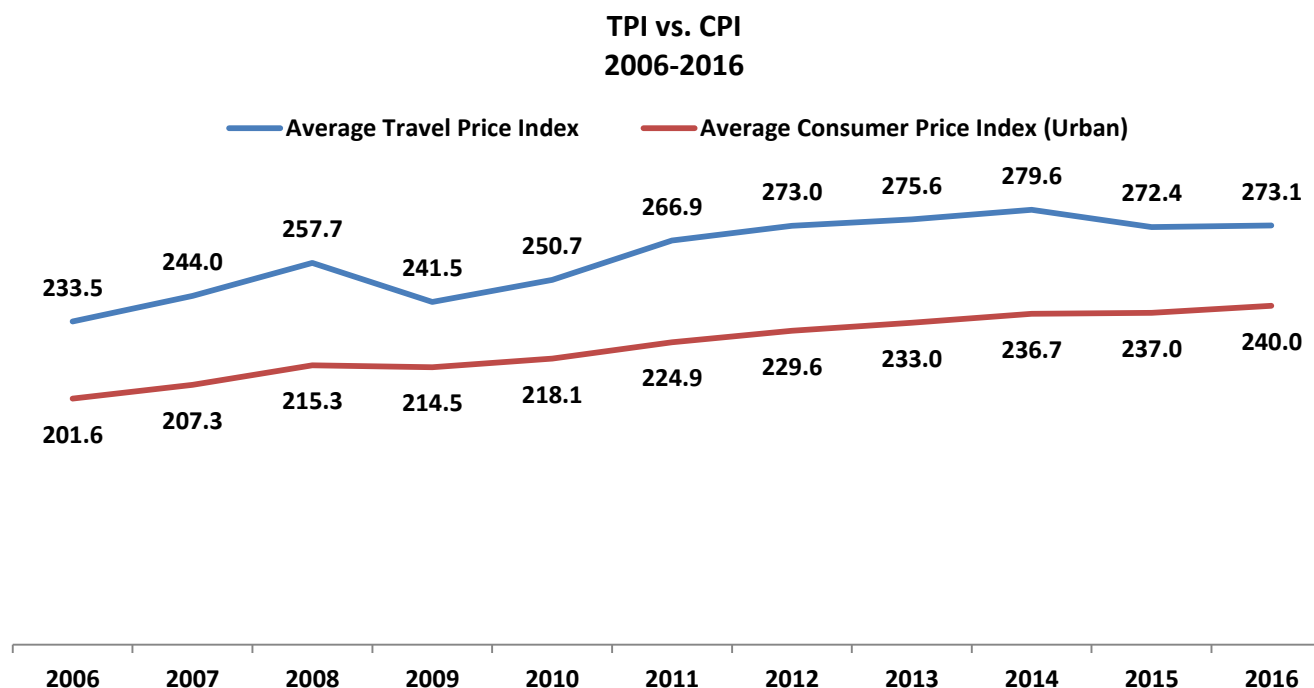


2016 gas prices continued the descent that began in late 2014, maintaining a lower average price as compared to 2014 and 2015.

- Maine's gasoline prices were above the national average for most of 2016, with a few exceptions.

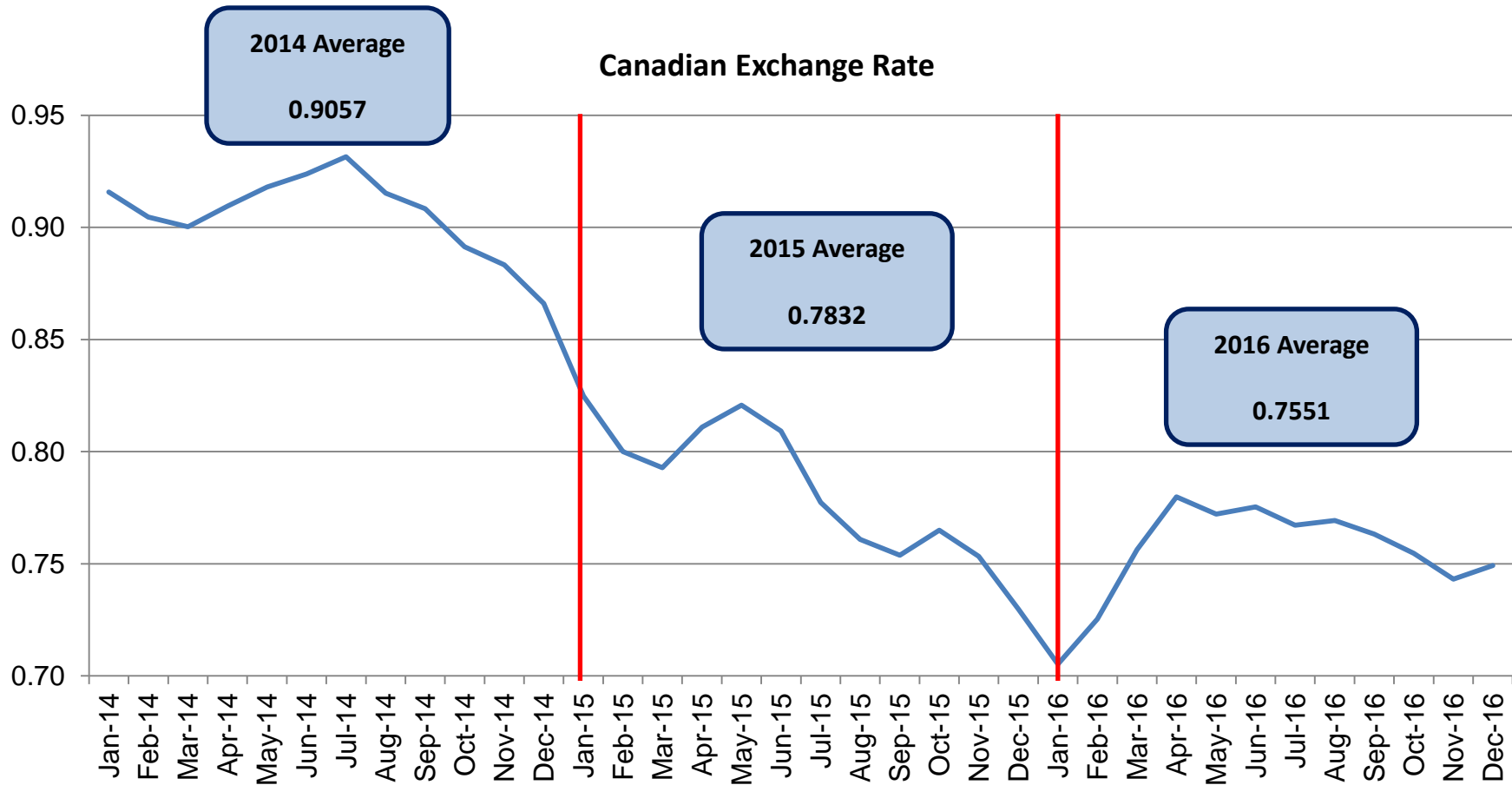


Though still exceeding the Consumer Price Index and indicating a relatively high cost of travel, the Travel Price Index* remained lower in 2016 than it was in 2013 & 2014.



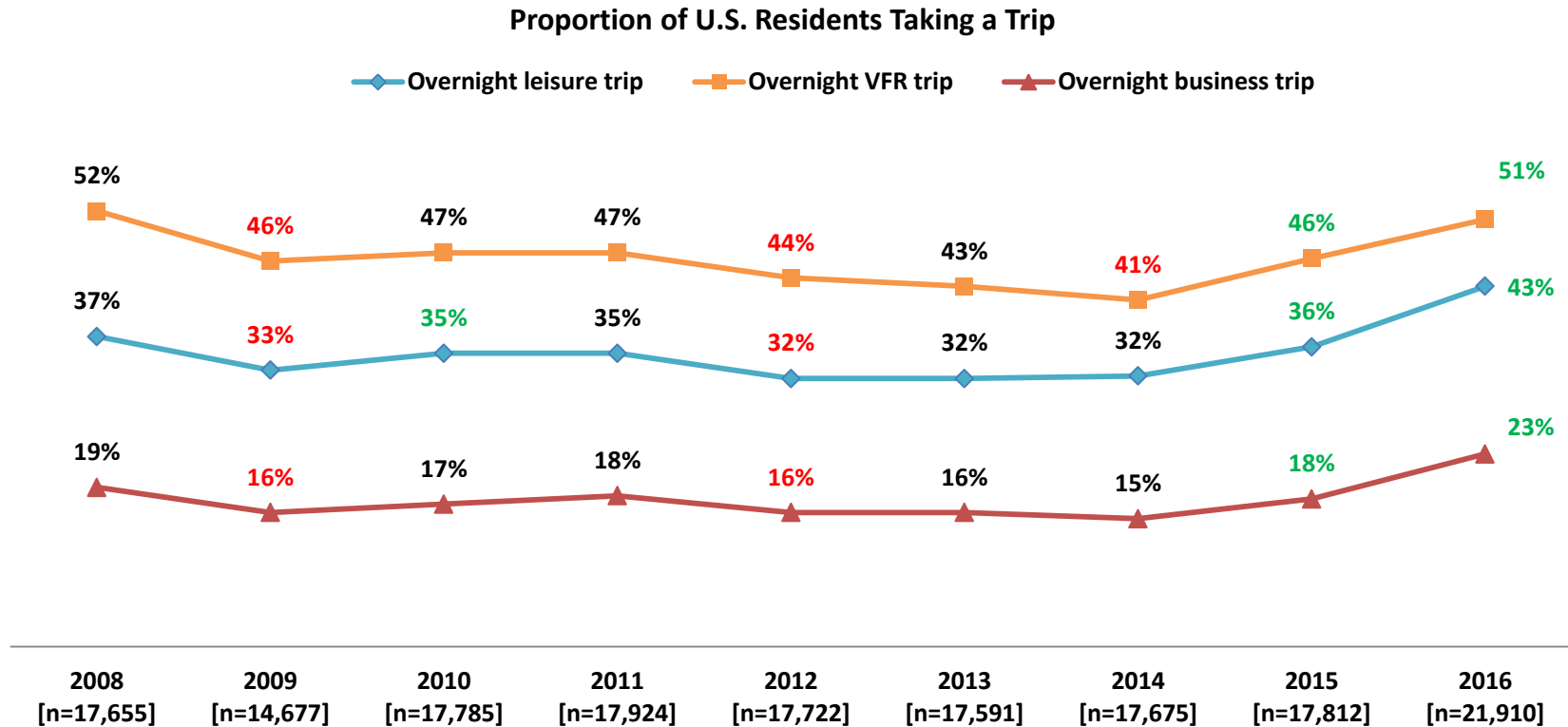
*"Developed by the U.S. Travel Association, the Travel Price Index (TPI) measures the seasonally unadjusted inflation rate of the cost of travel away from home in the United States. The TPI is based on U.S. Department of Labor price data collected for the monthly Consumer Price Index (CPI). The TPI is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

It has continued to be more expensive to travel to the U.S. from Canada due to the declining exchange rate.



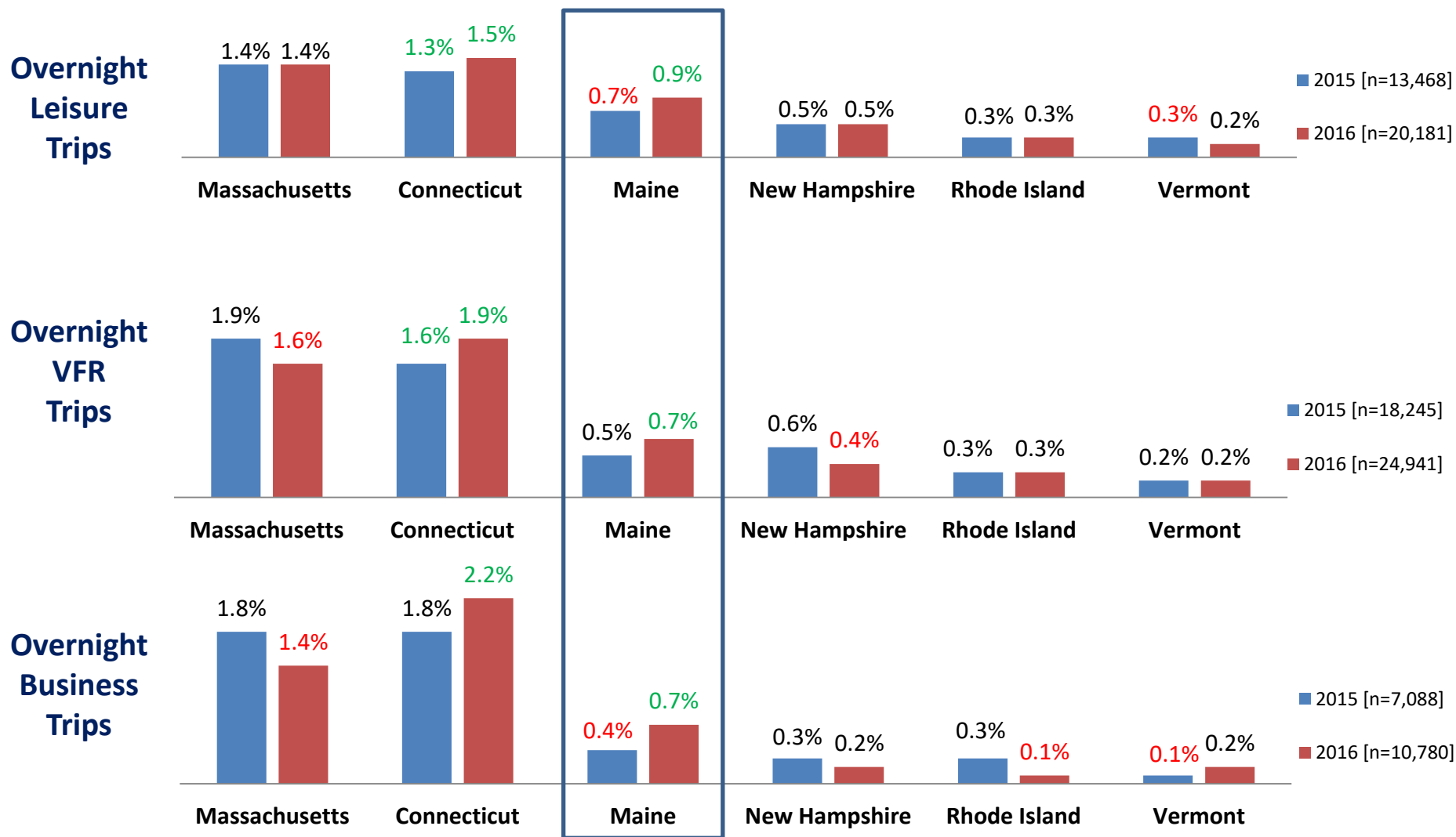
Baseline Visitor Statistics

Overnight travel among U.S. residents increased again in 2016, returning to levels not seen since 2008.



- The U.S. Travel Association's Travel Trends Index also reports a 2.4% growth in travel to and within the U.S. between January 2016 and January 2017.

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



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

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

Maine's estimated overnight visitation* was up nearly 5% over 2015, with the greatest percentage increase seen during the Fall season.

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

Tourism-Related Overnight Visitation

	2015 Total	2016				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	17,972,749	18,859,849	10,383,864	7,241,915	1,234,072	4.9%
Winter	3,003,827	3,089,183	1,751,969	1,097,797	239,417	2.8%
Summer	9,264,398	9,672,630	5,433,596	3,717,812	521,223	4.4%
Fall	5,704,524	6,098,036	3,198,299	2,426,306	473,432	6.9%
NET Trips	6,436,646	6,585,125	3,707,399	2,407,179	470,547	2.3%
Winter	1,062,710	1,095,034	630,742	384,818	79,475	3.0%
Summer	3,141,334	3,283,347	1,951,100	1,129,779	202,469	4.5%
Fall	2,232,602	2,206,743	1,125,558	892,583	188,603	-1.2%

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

Tourism-related trips include:

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

Maine's estimated day visitation* was up 3.5% over 2015, with the greatest year-over-year percentage increase seen during the Fall season.

Tourism-Related Day Visitation

	2015 Total	2016				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	21,563,121	22,314,546	13,698,274	7,702,528	913,744	3.5%
Winter	2,542,307	2,526,487	1,509,800	874,287	142,400	-0.6%
Summer	15,198,059	15,655,436	9,718,406	5,346,024	591,005	3.0%
Fall	3,822,755	4,132,624	2,470,068	1,482,217	180,339	8.1%
NET Trips	7,702,849	8,261,918	5,196,299	2,686,849	378,770	7.3%
Winter	925,825	947,850	571,079	320,103	56,668	2.4%
Summer	5,336,110	5,798,055	3,712,437	1,838,264	247,354	8.7%
Fall	1,440,914	1,516,013	912,783	528,482	74,748	5.2%

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

Tourism-related trips include:

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

During 2016, visitors spent nearly \$6 billion in Maine, 6% more than they did in 2015.

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

Direct Tourism Expenditures Tourism Related Trips*	Total 2015	Total 2016	Winter/Spring 2016	Summer 2016	Fall 2016	Y/Y % Difference
NET Spending	\$5,645,524,402	\$5,989,481,329	\$982,328,932	\$3,335,527,674	\$1,671,624,723	6.1%
Lodging	\$1,645,071,621	\$1,817,710,496	\$298,120,908	\$1,012,278,581	\$507,311,007	10.5%
Restaurant/Food	\$1,505,910,031	\$1,567,874,621	\$257,145,572	\$873,145,586	\$437,583,463	4.1%
Retail Sales	\$1,478,307,803	\$1,527,493,109	\$250,522,640	\$850,657,220	\$426,313,249	3.3%
Recreation	\$505,656,269	\$567,692,496	\$93,106,687	\$316,146,579	\$158,439,230	12.3%
Gasoline	\$463,985,391	\$459,877,857	\$75,424,114	\$256,104,867	\$128,348,876	-0.9%
Transportation	\$46,593,287	\$48,832,750	\$8,009,011	\$27,194,840	\$13,628,898	4.8%

*For the purposes of expenditure estimates, visitors are defined as all overnight visitors and all out of state day visitors on tourism-related trips.
Tourism-related trips include:

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

Overnight Trip Planning

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

- The type of trip these travelers are taking impacts the sources they consult for planning, with business travelers being more likely than leisure and VFR travelers to consult many of these sources.
- Leisure travelers are most likely to use the Internet when planning this recent trip to Maine.
- Travelers staying in paid accommodations are also more likely to consult a greater variety of sources when planning their trip to Maine.

Sources Used	2016 TOTAL (n=2909)	Leisure (n=1216) [a]	VFR (n=1168) [b]	Business (n=524) [c]	Paid Accommodations (n=1909) [d]	Unpaid Accommodations (n=1000) [e]
The Internet	62%	69% bc	55%	62% b	69% e	50%
Friends/relatives/co-workers' advice	46%	41% c	57% ac	34%	41%	56% d
Social Media such as Facebook, Twitter, etc.	24%	20%	25% a	31% a	24%	24%
Travel guides/brochures	17%	20% b	13%	19% b	19% e	13%
AAA	16%	16%	16%	17%	18% e	13%
Travel planning apps	15%	15%	12%	23% ab	17% e	11%
Travel magazines	11%	11% b	7%	17% ab	11%	9%
State tourism office	11%	12% b	8%	15% b	13% e	7%
Travel books	12%	12%	10%	15% b	13% e	9%
Articles or travelogues	7%	7% b	4%	14% ab	8%	6%
Local Convention and Visitors Bureaus	7%	7% b	4%	16% ab	8% e	5%
Travel agent	7%	5%	4%	19% ab	7%	6%
Local Chambers of Commerce	4%	4%	3%	8% ab	5% e	3%
Other	6%	6%	7%	5%	4%	9% d
AVERAGE # OF SOURCES CONSULTED	2.5	2.4 b	2.2	2.9 ab	2.6 e	2.2

Q18. When you were planning this recent trip in Maine, which of the following sources did you use?

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

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

Visitors less familiar with Maine are more likely to consult multiple sources when planning their overnight trip.

- Visitors traveling from outside of New England are more likely than those living closer to Maine to utilize many of these information sources when planning their trip to Maine.
- Similarly, first-time visitors are more likely than repeat visitors to consult multiple travel planning sources while planning this trip to Maine.

Sources Used	2016 TOTAL (n=2909)	Residence				Repeat Visitation	
		Maine (n=206) [a]	New England (n=1096) [b]	Other U.S. (n=1210) [c]	Canada (n=397) [d]	First-Time (n=659) [e]	Repeat (n=2250) [f]
The Internet	62%	48%	62% a	65% a	65% a	62%	62%
Friends/relatives/co-workers' advice	46%	43%	47% d	48% d	38%	45%	46%
Social Media such as Facebook, Twitter, etc.	24%	21%	21%	28% bd	20%	28% f	23%
Travel guides/brochures	17%	4%	14% a	21% ab	17% a	23% f	15%
AAA	16%	9%	19% ad	16% ad	10%	17%	16%
Travel planning apps	15%	10%	11%	18% ab	17% ab	19% f	14%
Travel magazines	11%	6%	7%	14% ab	13% ab	16% f	9%
State tourism office	11%	8%	9%	12%	14% ab	13%	10%
Travel books	12%	4%	9% a	15% ab	13% ab	15% f	10%
Articles or travelogues	7%	4%	5%	10% ab	7%	9%	7%
Local convention and visitors bureaus	7%	2%	5%	10% ab	8% ab	10% f	6%
Travel agent	7%	1%	2%	11% ab	12% ab	13% f	5%
Local Chambers of Commerce	4%	5%	4%	5%	4%	5%	4%
Other	6%	15% bcd	7% cd	4%	4%	2%	7% e
AVERAGE # OF SOURCES CONSULTED	2.5	1.8	2.2 a	2.8 ab	2.4	2.8 f	2.4

Q18. When you were planning this recent trip in Maine, which of the following sources did you use?

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

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

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

Sources Used	2016 TOTAL (n=2909)	Kids on Trip		Age	
		Yes (n=955) [a]	No (n=1954) [b]	<45 (n=1633) [c]	45+ (n=1276) [d]
The Internet	62%	67% b	60%	67% d	56%
Friends/relatives/co-workers' advice	46%	48%	45%	47%	45%
Social Media such as Facebook, Twitter, etc.	24%	30% b	21%	31% d	14%
Travel guides/brochures	17%	18%	17%	18% d	15%
AAA	16%	17%	16%	15%	18% c
Travel planning apps	15%	20% b	13%	19% d	10%
Travel magazines	11%	15% b	9%	13% d	7%
State tourism office	11%	13%	10%	11%	11%
Travel books	12%	14% b	10%	13% d	10%
Articles or travelogues	7%	6%	8%	9% d	5%
Local convention and visitors bureaus	7%	8%	7%	8%	7%
Travel agent	7%	8%	6%	10% d	3%
Local Chambers of Commerce	4%	3%	5% a	3%	6% c
Other	6%	4%	7% a	3%	10% c
AVERAGE # OF SOURCES CONSULTED	2.5	2.7 b	2.3	2.7 d	2.2

Q18. When you were planning this recent trip in Maine, which of the following sources did you use?

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

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

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

- Since its addition to the survey instrument in 2012, *social media* has exhibited increases in usage each year.

Sources Used	2008 (n=3320)	2009 (n=3057)	2010 (n=2992)	2011 (n=2954)	2012 (n=2497)	2013 (n=2675)	2014 (n=2930)	2015 (n=2779)	2016 (n=2909)
The Internet	66%	66%	66%	65%	63%	64%	64%	65%	62%
Friends/ relatives/ co-workers' advice	49%	43%	42%	42%	35%	34%	45%	44%	46%
Social Media	n/a	n/a	n/a	n/a	8%	10%	18%	20%	24%
Travel guides/ brochures	15%	16%	14%	15%	13%	12%	17%	20%	17%
AAA	21%	20%	20%	20%	18%	16%	16%	18%	16%
Travel planning apps	n/a	n/a	n/a	n/a	n/a	n/a	11%	14%	15%
Travel magazines	n/a	9%	9%	8%	8%	9%	12%	13%	11%
State tourism office	n/a	n/a	n/a	n/a	n/a	n/a	11%	12%	11%
Travel Books	13%	11%	10%	10%	8%	9%	10%	11%	12%
Articles or travelogues	n/a	8%	7%	7%	7%	7%	7%	8%	7%
Contact local convention and visitors bureaus	4%	5%	5%	5%	5%	5%	6%	7%	7%
Contact local Chambers of Commerce	4%	5%	4%	4%	0%	6%	5%	6%	4%
Travel agent	5%	6%	6%	4%	0%	4%	5%	6%	7%

Q18. When you were planning this recent trip in Maine, which of the following sources did you use?

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

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

- Business travelers and travelers from outside of New England are more likely to have visited multiple websites when planning their trip to Maine.

Websites Used (Base: Visitors Who Used Internet When Planning their Trip to Maine)	2016 TOTAL (n=1980)	Leisure (n=875) [a]	VFR (n=741) [b]	Business (n=365) [c]	Maine (n=114) [d]	New England (n=727) [e]	Other U.S. (n=860) [f]
Any (NET)	96%	96%	96%	97%	90%	94%	98% de
TripAdvisor	36%	37% b	31%	44% b	18%	35% d	39% d
VisitMaine.com	35%	38% b	31%	34%	14%	33% d	40% de
Google maps	34%	33%	35%	33%	36%	31%	34%
Online search engines	32%	32%	34% c	26%	35%	32%	33%
Facebook	31%	24%	34% a	40% a	38%	27%	36% e
Maine Tourism Region Websites (NET)	29%	31%	26%	30%	25%	31%	30%
Booking websites	21%	21%	16%	32% ab	12%	18%	24% d
Lodging/hotel/accommodation websites	19%	21% b	17%	19%	19%	23% f	18%
Mainetourism.com	16%	18% b	14%	14%	8%	17% d	15% d
Youtube	16%	14%	14%	23% ab	5%	9%	22% de
Google+	14%	11%	15% a	20% a	14%	12%	16%
Twitter	9%	7%	8%	14% ab	3%	5%	13% de
Travel blogs	9%	9%	7%	12% b	6%	5%	13% de
DiscoverNewEngland.com	8%	7%	7%	10%	3%	7%	9% d
Airline websites	6%	3%	6% a	13% ab	2%	1%	10% de
Chambers of Commerce websites	5%	4%	5%	8% a	8%	6%	5%
Zagat	5%	4%	3%	9% ab	-	3%	8% e
Convention and/or visitor bureau websites	4%	3%	2%	7% ab	-	2%	5% e
Frommers	3%	4% b	2%	2%	-	1%	4% e
Other Maine travel web sites (Please specify)	<1%	1%	<1%	-	<1%	1%	<1%
Other (Please specify)	2%	4% c	2%	1%	2%	4% f	2%

Q19. Which of the following web sites did you visit when planning this trip in Maine?

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

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

Half of Maine's overnight visitors used a peer-to-peer or shared network to book either lodging or transportation for their trip.

- For lodging, *Airbnb* is the most utilized shared network, while *Uber* is the most popular transportation network.
- Business travelers (74%) are much more likely than leisure (41%) or VFR (45%) travelers to have booked either their lodging or transportation using a shared network. Likewise, first-time visitors (68%) are more likely than repeat visitors (43%) to have used a shared network for lodging or transportation.

Websites Used (Base: Visitors Who Used Internet When Planning their Trip to Maine)	2016 TOTAL (n=2909)	Leisure (n=1216) [a]	VFR (n=1168) [b]	Business (n=524) [c]	First-Time Visitor (n=659) [d]	Repeat Visitor (n=2250) [e]
Any (NET)	48%	41%	45%	74% ab	68% e	43%
Lodging (NET)	43%	37%	40%	65% ab	62% e	38%
Airbnb	16%	14%	12%	30% ab	28% e	13%
VRBO (Vacation Rentals by Owner)	7%	7%	5%	12% ab	11% e	6%
One Fine Stay	7%	5%	5%	16% ab	14% e	5%
Flipkey	5%	2%	4%	13% ab	10% e	3%
Other lodging	13%	12% c	17% ac	8%	9%	14% d
Transportation (NET)	41%	33%	39% a	63% ab	55% e	37%
Uber	21%	16%	15%	46% ab	35% e	17%
Lyft	5%	3%	4%	10% ab	8% e	3%
Sidecar	4%	3%	3%	9% ab	8% e	3%
Other transportation	15%	14% c	20% ac	7%	10%	17% d
None of the above	52%	59% c	55% c	26%	32%	57% d

Q20. For this specific trip in Maine, which (if any) of the following peer-to-peer or shared networks did you use to book your lodging (AirBnB, VRBO, etc.) or transportation (Uber, Lyft, etc.)? Please check all that apply.

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

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

Younger visitors and those arriving from outside New England are more apt to use various shared networks for lodging or transportation.

- Maine residents are significantly *less* likely than all other visitors to use any shared networks for lodging or transportation needs during their trip.

Websites Used (Base: Visitors Who Used Internet When Planning their Trip to Maine)	2016 TOTAL (n=2909)	Maine (n=206) [a]	New England (n=1096) [b]	Other US (n=1210) [c]	Canada (n=397) [d]	<45 yrs (n=1633) [e]	45+ yrs (n=1276) [f]
Any (NET)	48%	29%	40% a	60% abd	48% ab	58% f	36%
Lodging (NET)	43%	28%	35%	53% abd	44% ab	50% f	34%
Airbnb	16%	4%	11% a	21% ab	19% ab	23% f	7%
VRBO (Vacation Rentals by Owner)	7%	3%	6%	9% a	8% a	9% f	5%
One Fine Stay	7%	4%	3%	10% ab	9% ab	10% f	3%
Flipkey	5%	<1%	2%	7% ab	7% ab	6% f	2%
Other Lodging	13%	16% d	15% d	12%	10%	9%	18% e
Transportation (NET)	41%	27%	35%	51% abd	37% a	49% f	31%
Uber	21%	5%	14% a	31% abd	19% ab	31% f	8%
Lyft	5%	<1%	1%	8% abd	5% ab	8% f	1%
Sidecar	4%	1%	2%	5% ab	8% abc	6% f	2%
Other Transportation	15%	20% cd	18% cd	13%	10%	11%	21% e
None of the above	52%	71% bcd	60% cd	40%	52% c	41%	64% e

Q20. For this specific trip in Maine, which (if any) of the following peer-to-peer or shared networks did you use to book your lodging (AirBnB, VRBO, etc.) or transportation (Uber, Lyft, etc.)? Please check all that apply.

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

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

The large majority of Maine's overnight visitors do not consider other vacation destinations when planning their trip.

- Of the 27% who did consider other destinations, the most frequently considered destinations included other New England states, New York, or Florida.

Other Destinations Considered	2016 (n=2909)
Didn't consider other destinations	71%
Any (NET)	27%
New Hampshire	7%
Vermont	6%
Massachusetts	3%
New York	3%
Florida	2%
Rhode Island	2%
Connecticut	1%
Maryland	1%
California	1%
New Jersey	1%

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

Outside New England	Maine, New England
<31%>	23%
1 st time	Repeat
<32%>	26%
Paid Accommodations	Unpaid Accommodations
<30%>	22%
Kids on Trip	No Kids
<32%>	25%
<45 yrs	45+ yrs
<32%>	22%

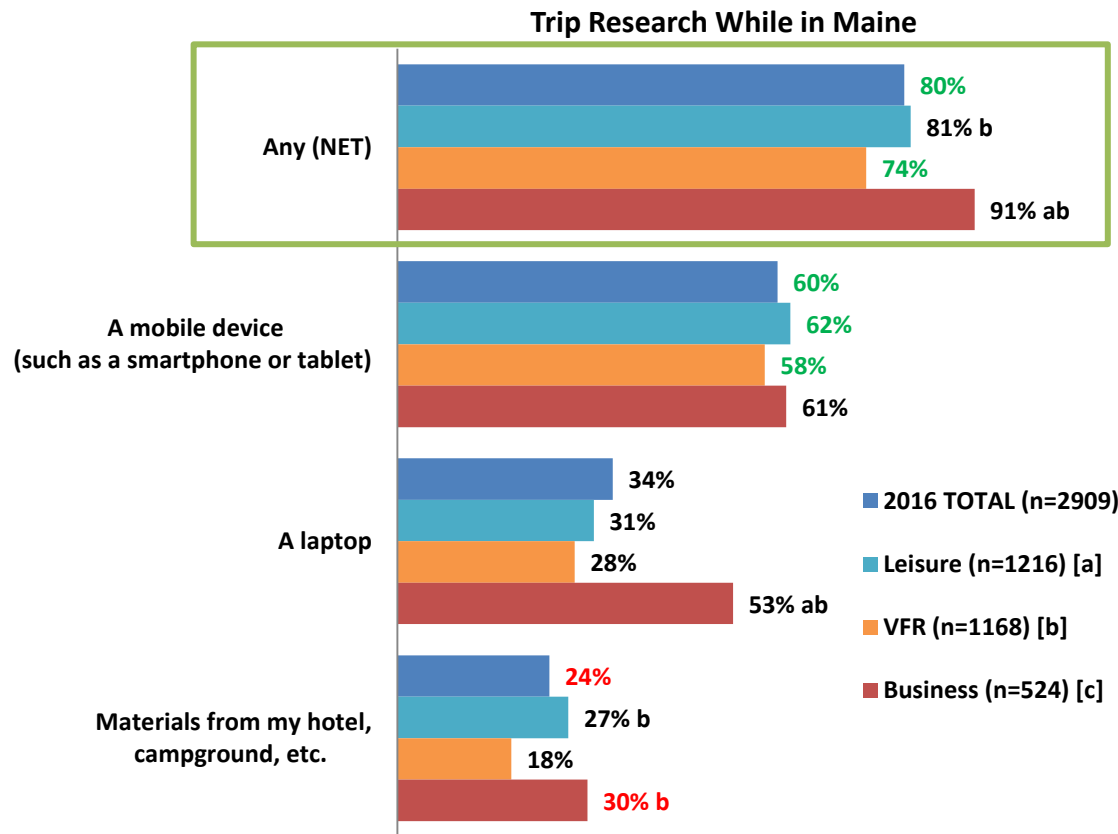
Q13. What other states or provinces, if any, did you consider for this specific trip?

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

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

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

- 2016 showed an increase in the proportion of overnight visitors using *mobile devices* (60% versus 54% in 2015) and a decrease in the proportion using materials from their *lodging* to research the local area while in Maine (24% versus 27% in 2015).
- Travelers who used their mobile device or laptop for additional research while in Maine reported mostly accessing apps/websites such as *Google, TripAdvisor, or Google Maps*.



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

1 st time	Repeat
<88%>	78%

Paid Accommodations	Unpaid Accommodations
<84%>	72%

Kids on Trip	No Kids
<84%>	78%

<45 yrs	45+ yrs
<89%>	69%

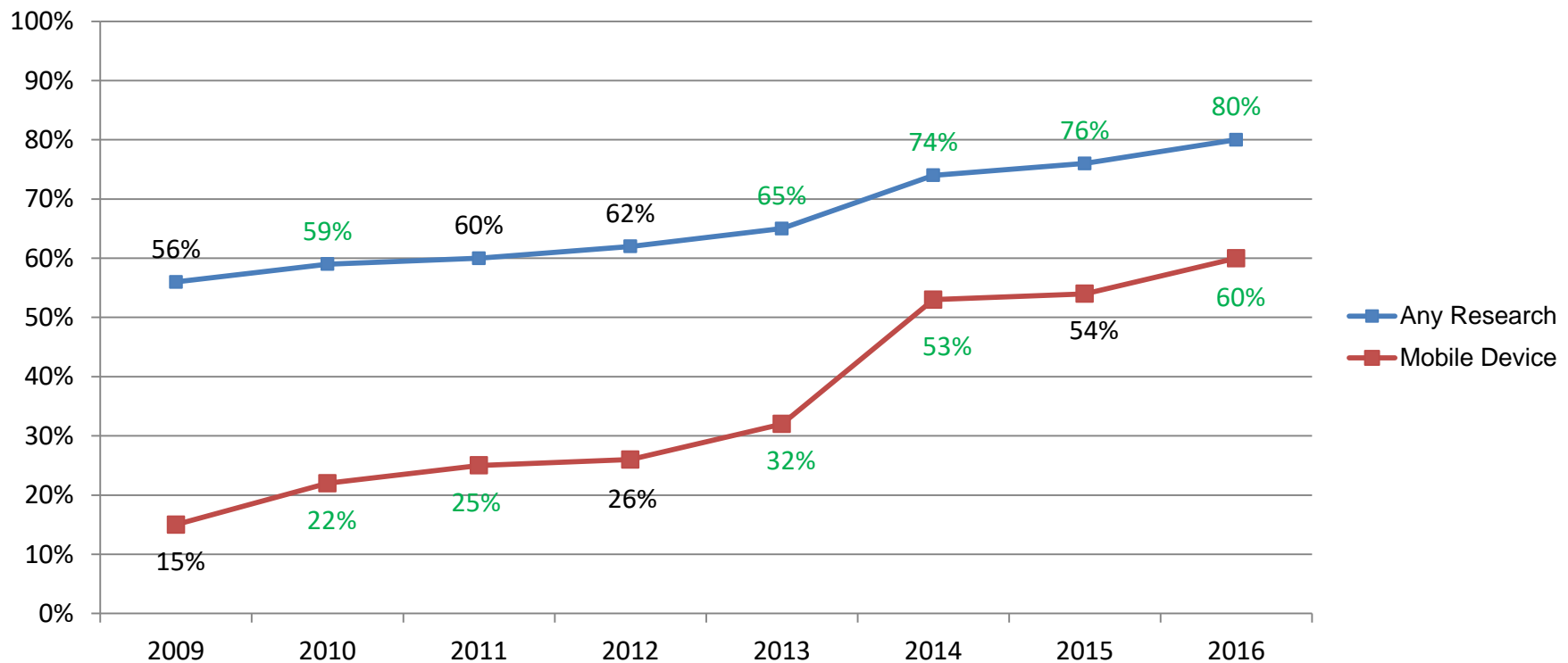
Q30. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

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

- This steady increase in travelers conducting travel research while in Maine could be tied to the increase in overall usage of mobile devices in the general population, as mobile devices also show an increase as a source for information when researching Maine while on their trip.

**Percent Researching Maine During Visit
2009 - 2016**



Q30. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

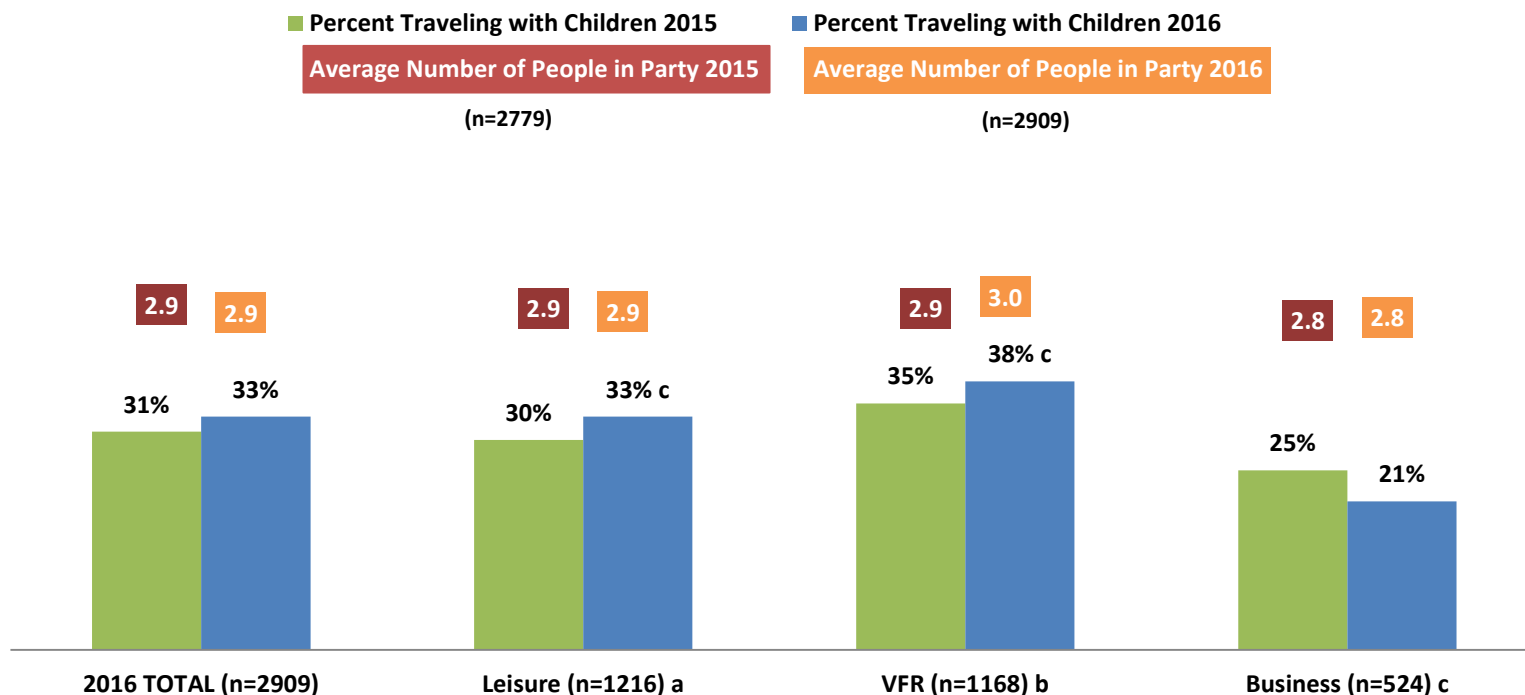
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitor Travel Logistics

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

- Not surprisingly, leisure and VFR travelers are more likely to be traveling with kids (33% and 38%, respectively) than are business travelers (21%).
- Americans, as well as visitors between the ages of 35 and 44 and those earning more than \$75,000 annually, are also more likely to be traveling with children.
- 2016 saw an increase in the proportion of Winter visitors traveling with children, as compared to the Winter 2015 season (38% versus 31%).

Travel Party Size and Composition



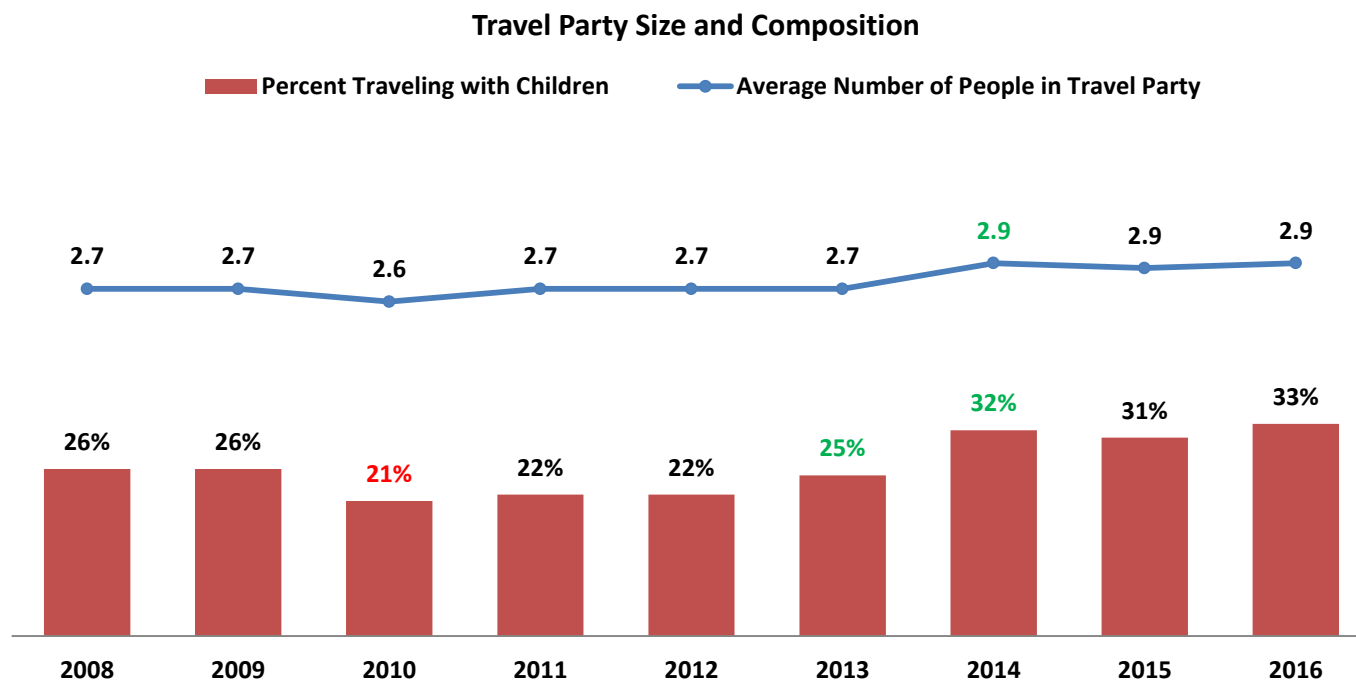
Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q22. How many of these people were: Children?

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

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

The proportion of overnight visitors traveling with children in 2016 is consistent with last year.



Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

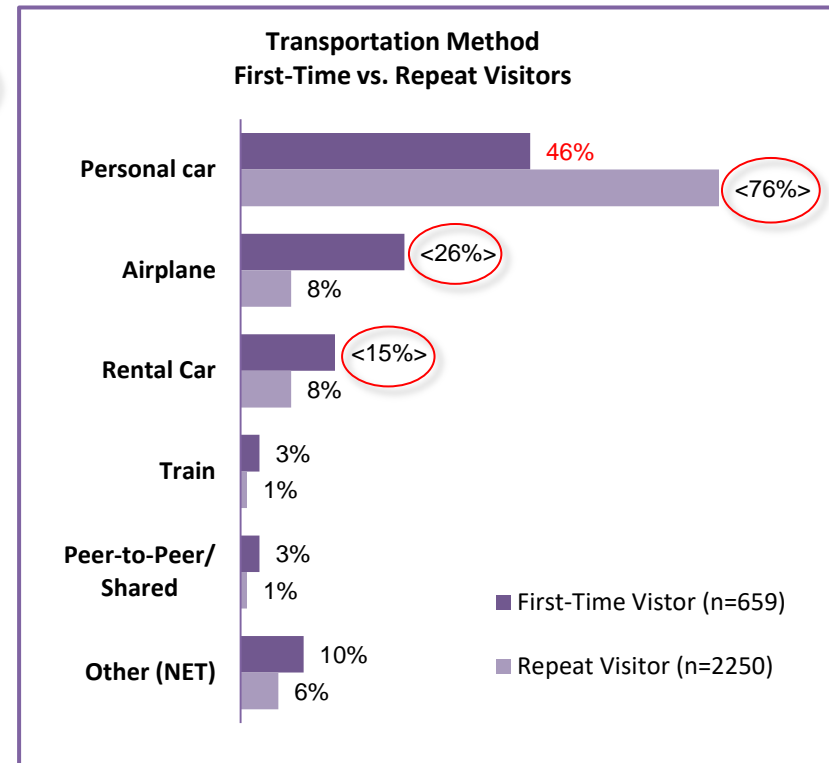
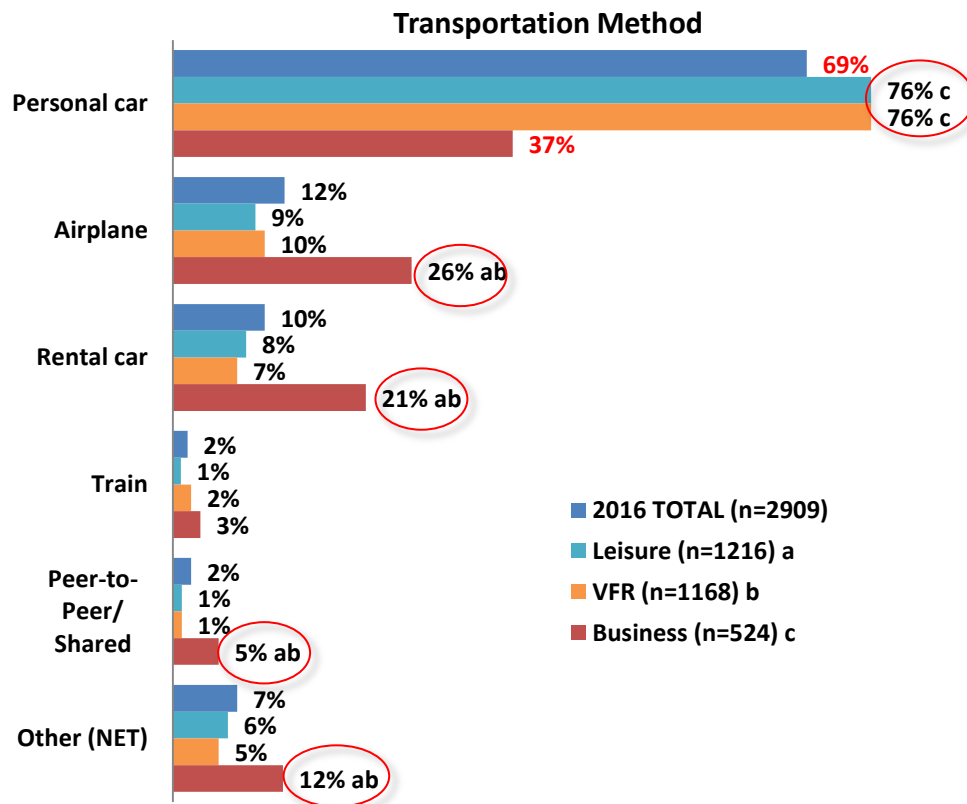
Q22. How many of these people were: Children?

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

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

The majority of overnight visitors use their personal car to travel to Maine.

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



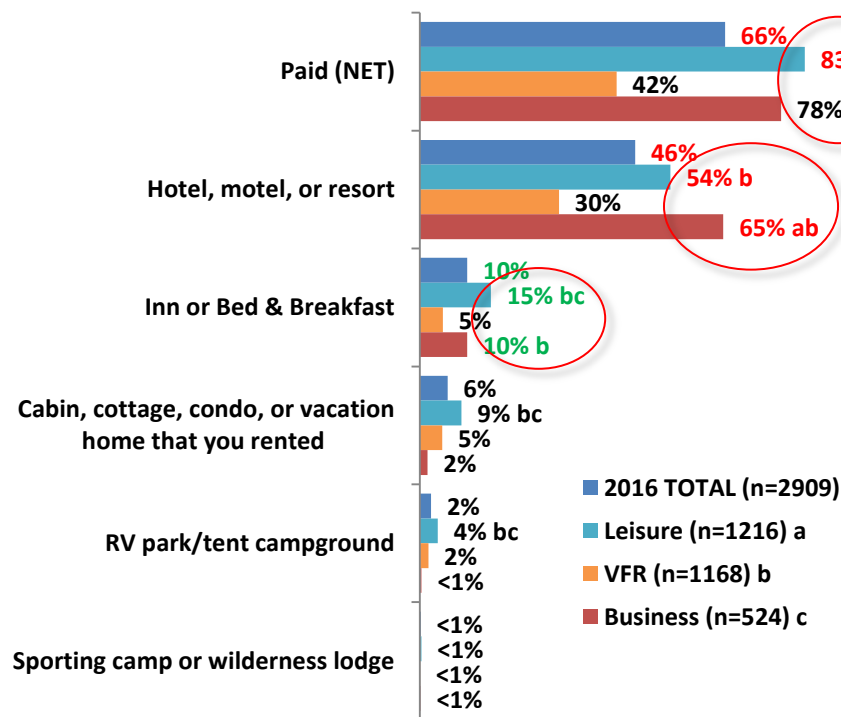
Q23. Which of the following types of transportation did you use to travel the most miles from your home to get to your Maine destination? <, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

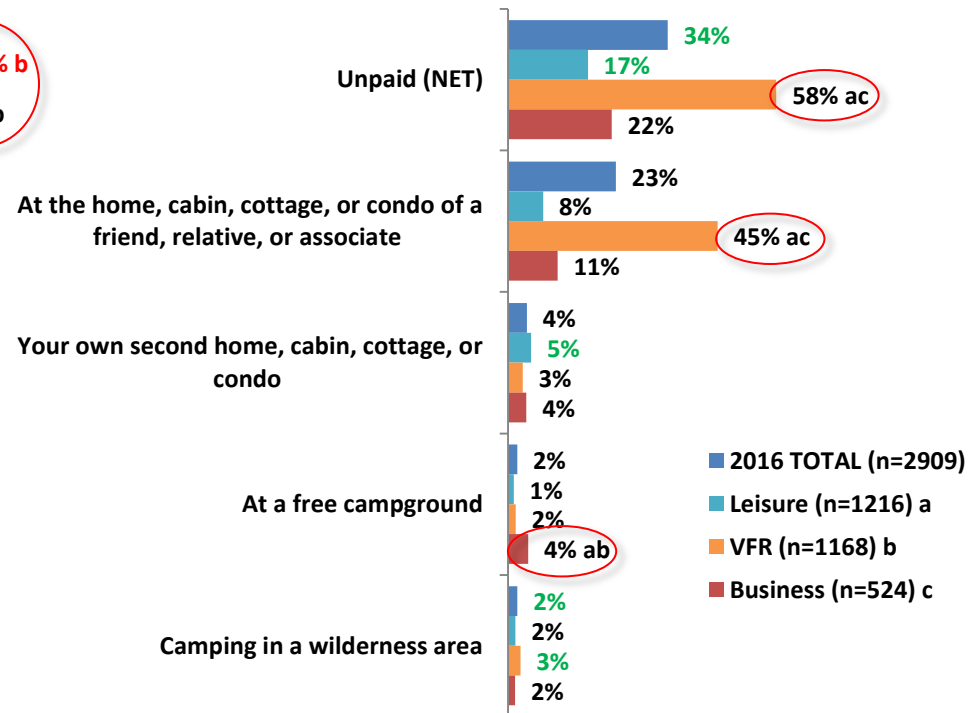
Paid accommodations are the principal lodging choice for Maine's overnight visitors, primarily *hotels/motels/resorts*.

- The proportion of overnight visitors staying in paid accommodations is lower in 2016 than it had been in 2015 (66% versus 71%), with the drop mostly seen in travelers staying at a *hotel/motel/resort* (46% versus 53% in 2015).
- Leisure and business travelers are most likely to stay in paid accommodations, while VFR travelers are most likely to be staying in unpaid accommodations.
- Canadian visitors (78% versus 64%), first-time visitors (72% versus 64%), and those between the ages of 35 and 44 (74%) are more likely than their counterparts to stay in paid accommodations.

Paid Accommodations



Unpaid Accommodations



Q24. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

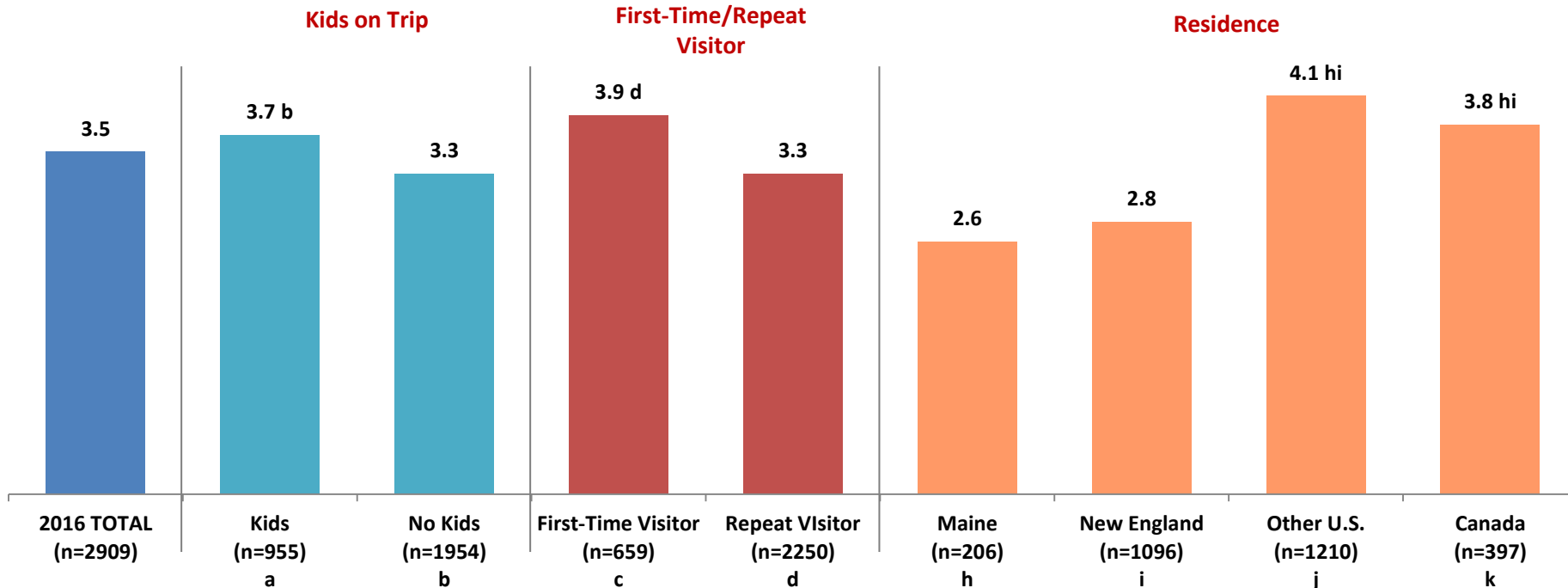
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

The average length of stay among overnight visitors falls between 3 and 4 nights.

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

Average Nights Away from Home



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

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

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

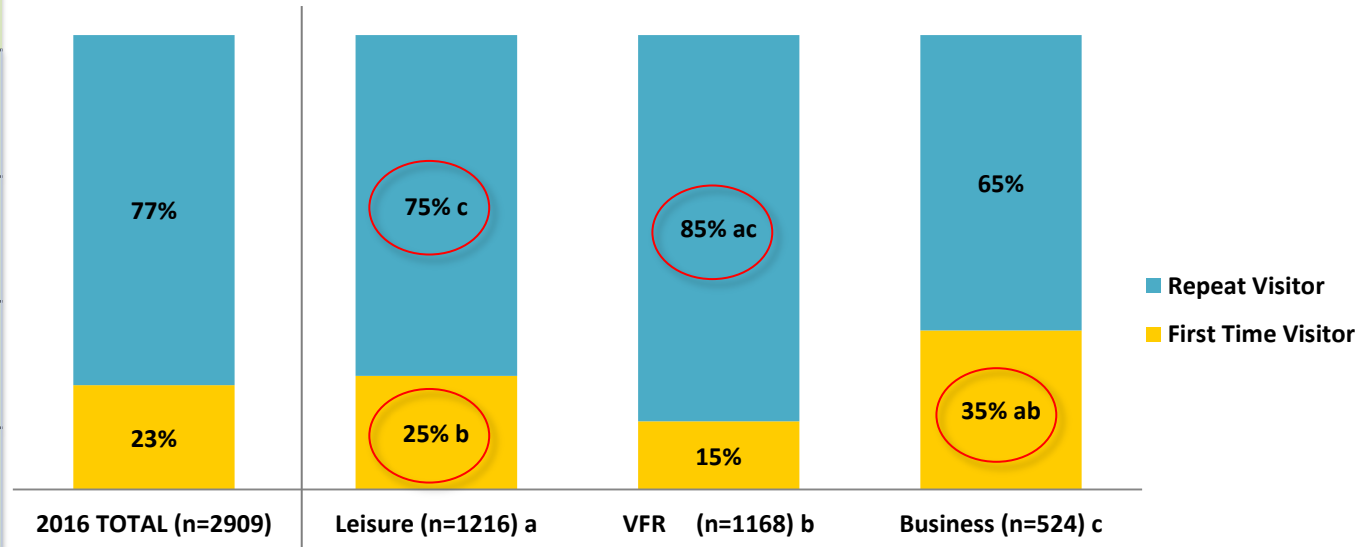
One-fourth of Maine's overnight visitors in 2016 were visiting the State for the first time.

- Business travelers are more likely than leisure or VFR travelers to be visiting Maine for the first time.
- While Canadians remain more likely than American travelers to be visiting Maine for the first time, Canadians in 2016 are even *more* likely to be visiting Maine for the first time than were Canadians in 2015 (34% versus 26%).

Younger travelers, those staying in paid accommodations, Canadians, and domestic visitors residing outside New England are all more likely to be visiting Maine for the first time.

< 45 yrs (n=1633)	45+ yrs (n=1276)
<30%>	13%
Paid Accom. (n=1909)	Unpaid Accom. (n=1000)
<25%>	19%
Outside New England (n=1210)	Maine, New England (n=1302)
<35%>	8%
Canada (n=397)	U.S. (n=2512)
<34%>	21%

Repeat vs. First-Time Visitors



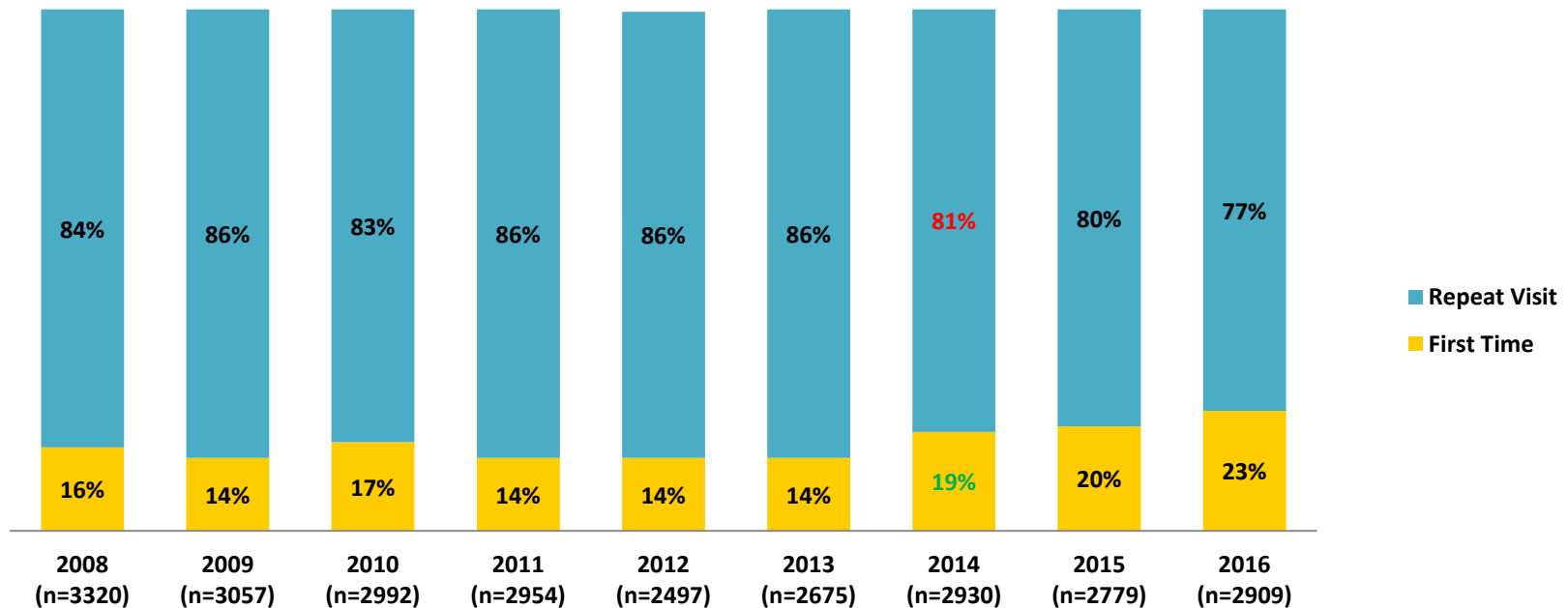
Q11. Was this your first visit in Maine?

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

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

The rate of first-time visitation has remained stable the past few years.

Repeat vs. First-Time Visitors Trend



Q11. Was this your first visit in Maine?

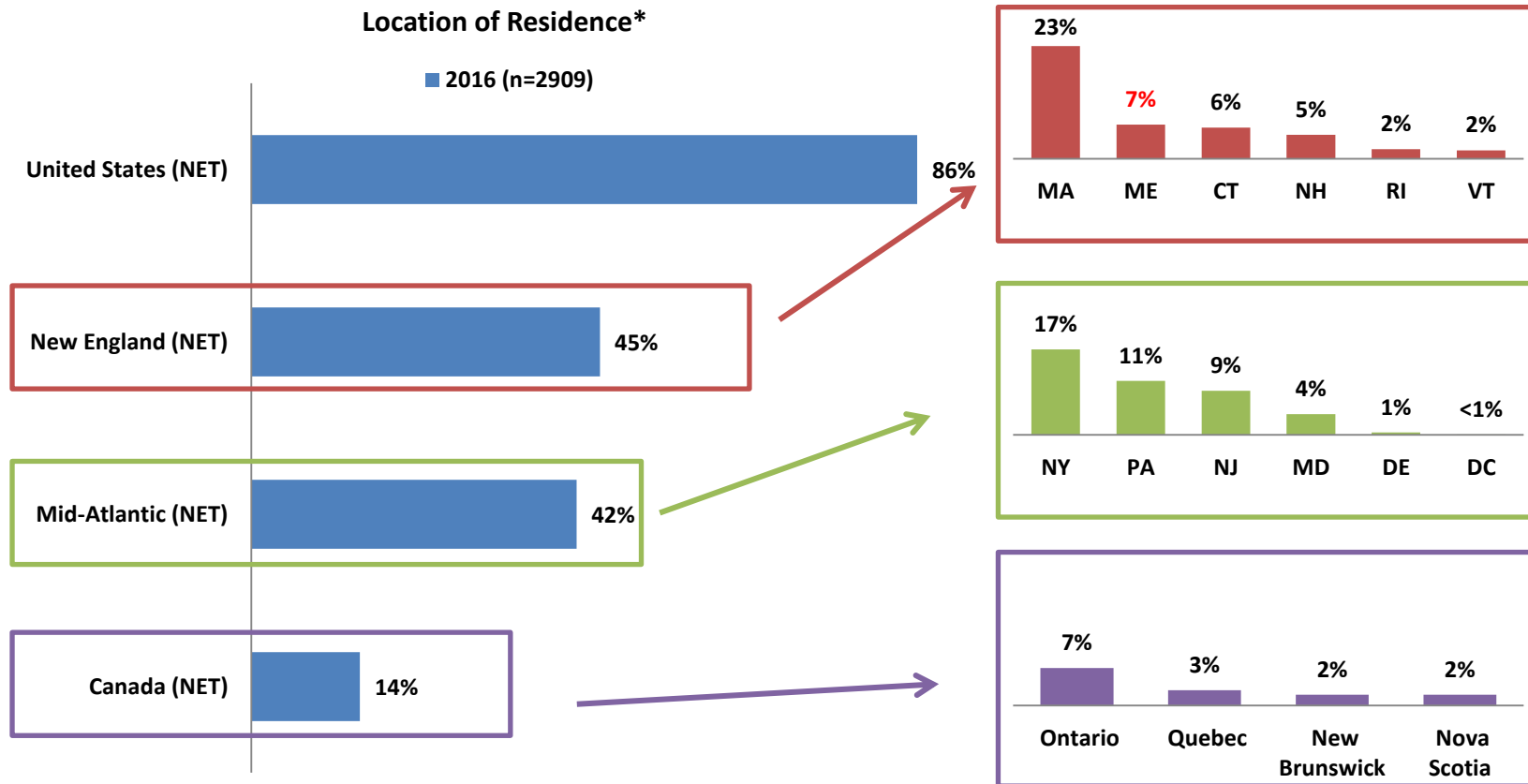
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Overnight Visitor Origin

Following two consecutive years of decreases, the proportion of Canadians visiting Maine remained stable in 2016.

- Massachusetts and New York continue to source the greatest proportion of overnight visitors to Maine, followed by Pennsylvania and New Jersey.
- The proportion of in-state overnight visitors dropped between 2015 and 2016.



*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

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

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

Visitors of certain age groups tend to arrive in Maine from different regions.

- Younger travelers are more likely to come from the Mid-Atlantic region, while older travelers come from New England.

	2016 TOTAL (n=2909)	<35 (n=983) [a]	35-44 (n=650) [b]	45-54 (n=516) [c]	55+ (n=760) d
United States (NET)	86%	88% b	83%	85%	89%
New England (NET)	45%	39%	42%	46% a	55% abc
Mid-Atlantic (NET)	42%	49% bcd	41%	39%	34%
Canada (NET)	14%	12%	17% a	15%	11%

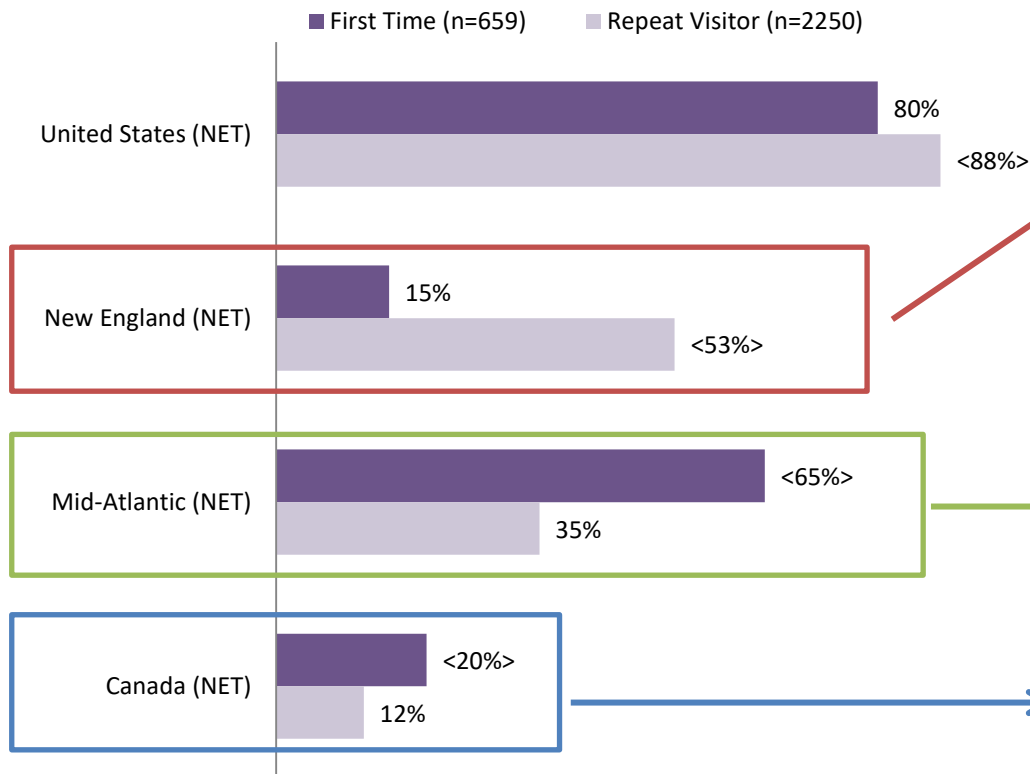
State/ Province of Residence

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

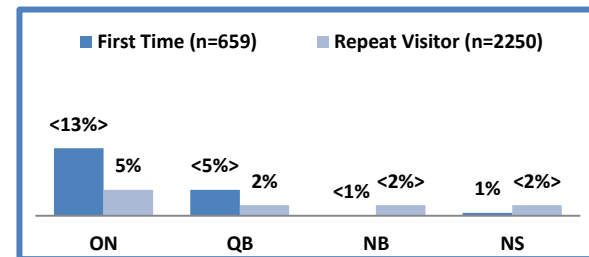
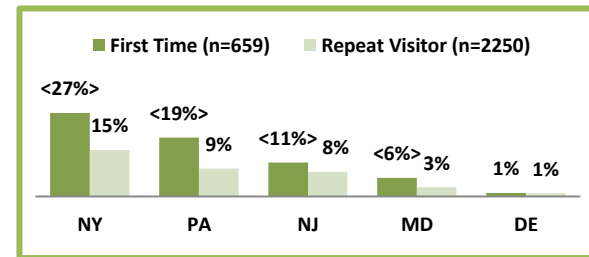
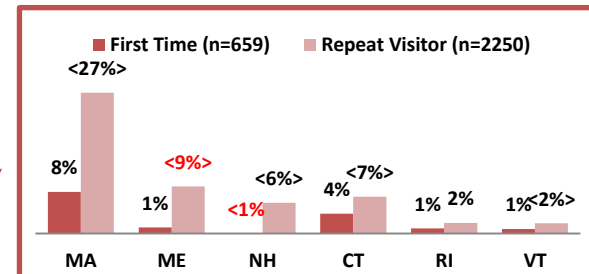
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Consistent with past years, the Mid-Atlantic region and Canada are more likely to send first-time visitors to Maine.

Percentage of First-Time and Repeat Visitors Residing in Each Region



Percentage of First-Time and Repeat Visitors Residing in Each State



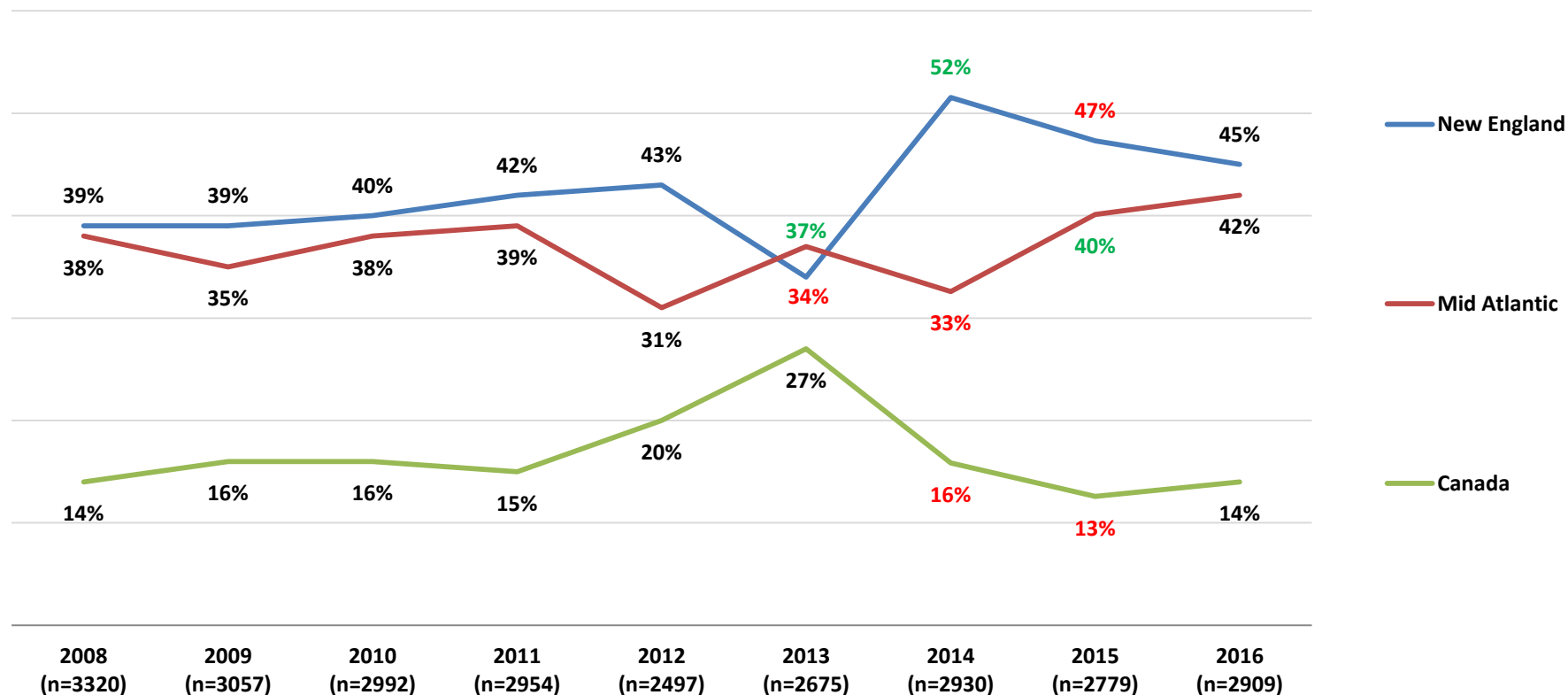
State/Province of Residence

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

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

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

Maine Overnight Visitor Origin



State/ Province of Residence

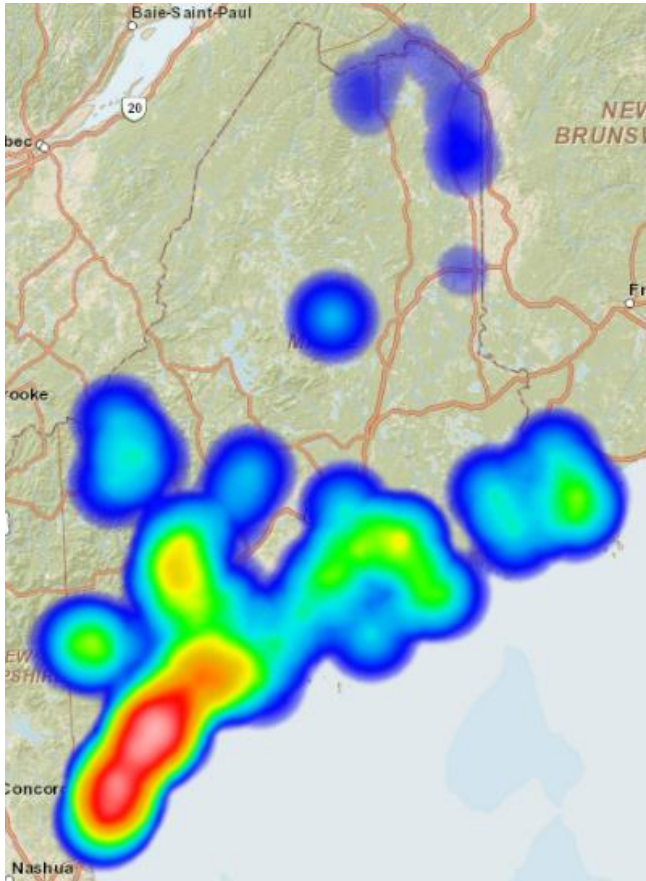
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

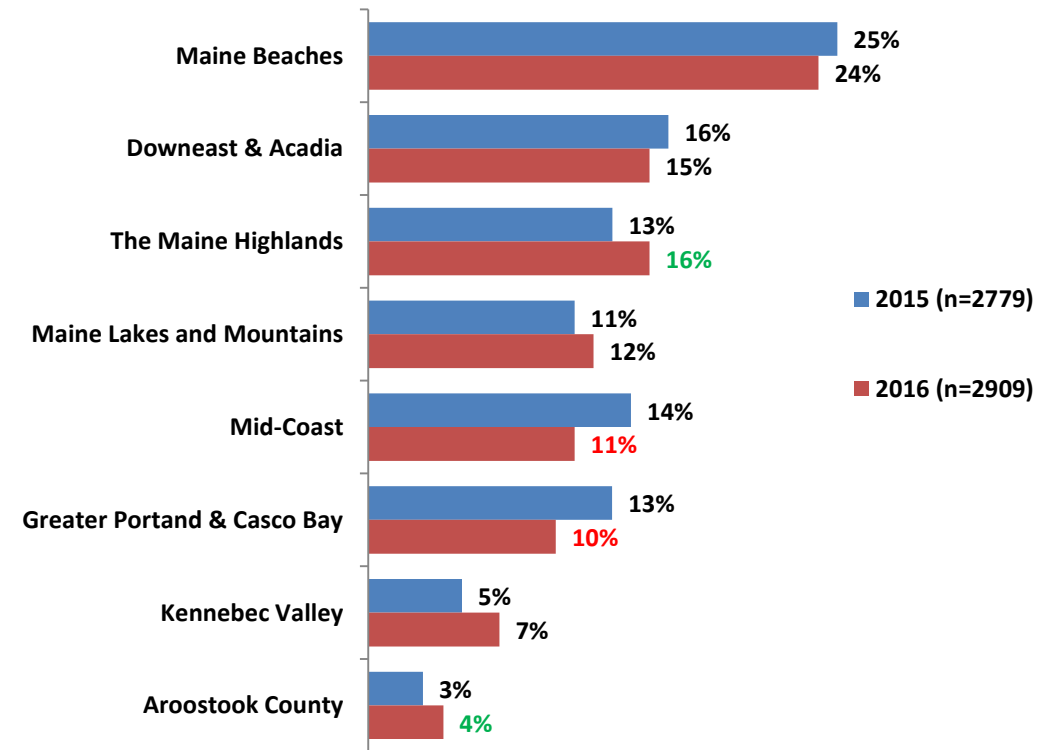
Overnight Visitor Experience in Maine

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

- Minor shifts in visitation to various regions include:
 - Increases in the proportion of travelers visiting the *Maine Highlands* and *Aroostook County*, and
 - Decreases in the proportion of travelers visiting the *Mid-Coast* and the *Greater Portland* region.



Primary Region of Visit

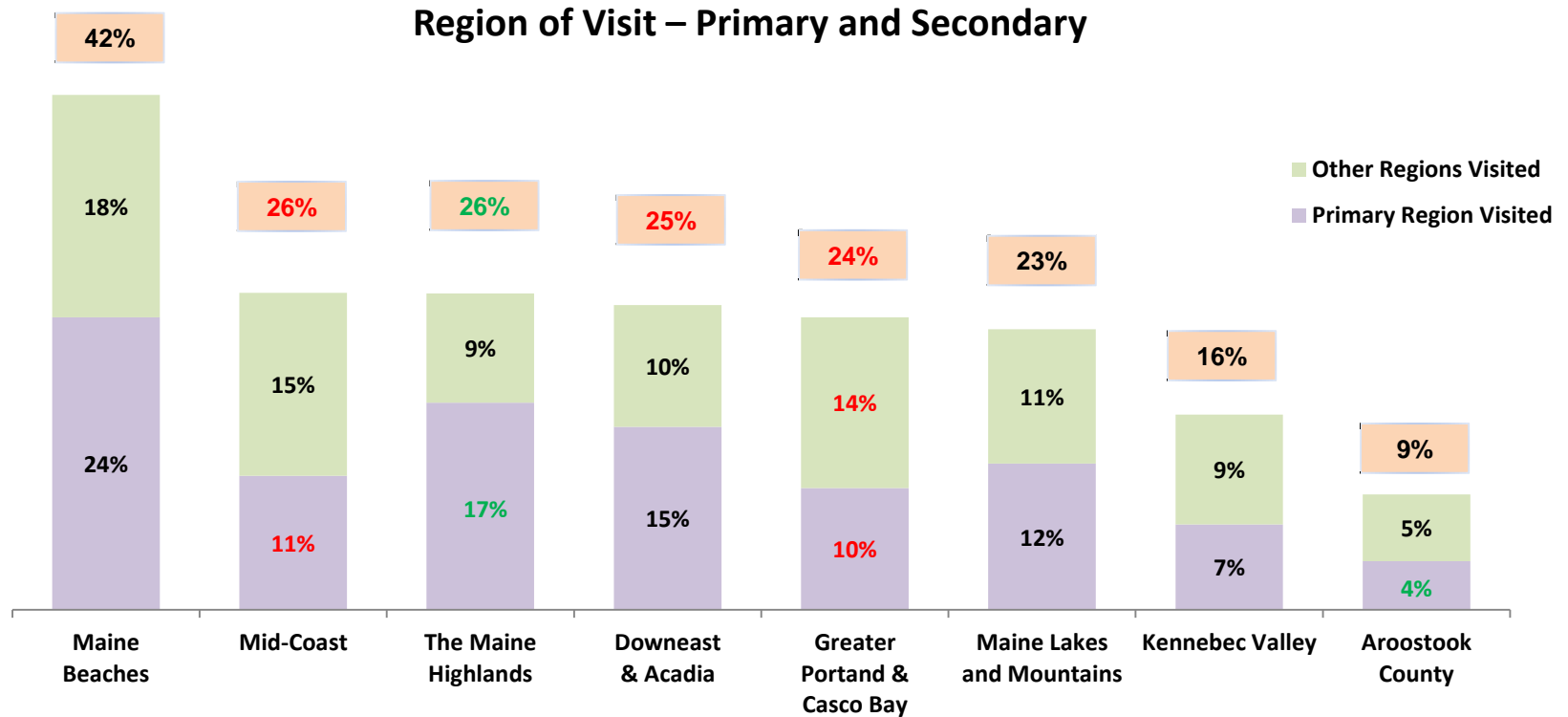


Q25. What region in Maine was your primary destination?

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

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

Overall visitation is also highest for the Maine Beaches region, followed by the Mid-Coast, Maine Highlands, and Downeast regions.



Q25. What region in Maine was your primary destination?

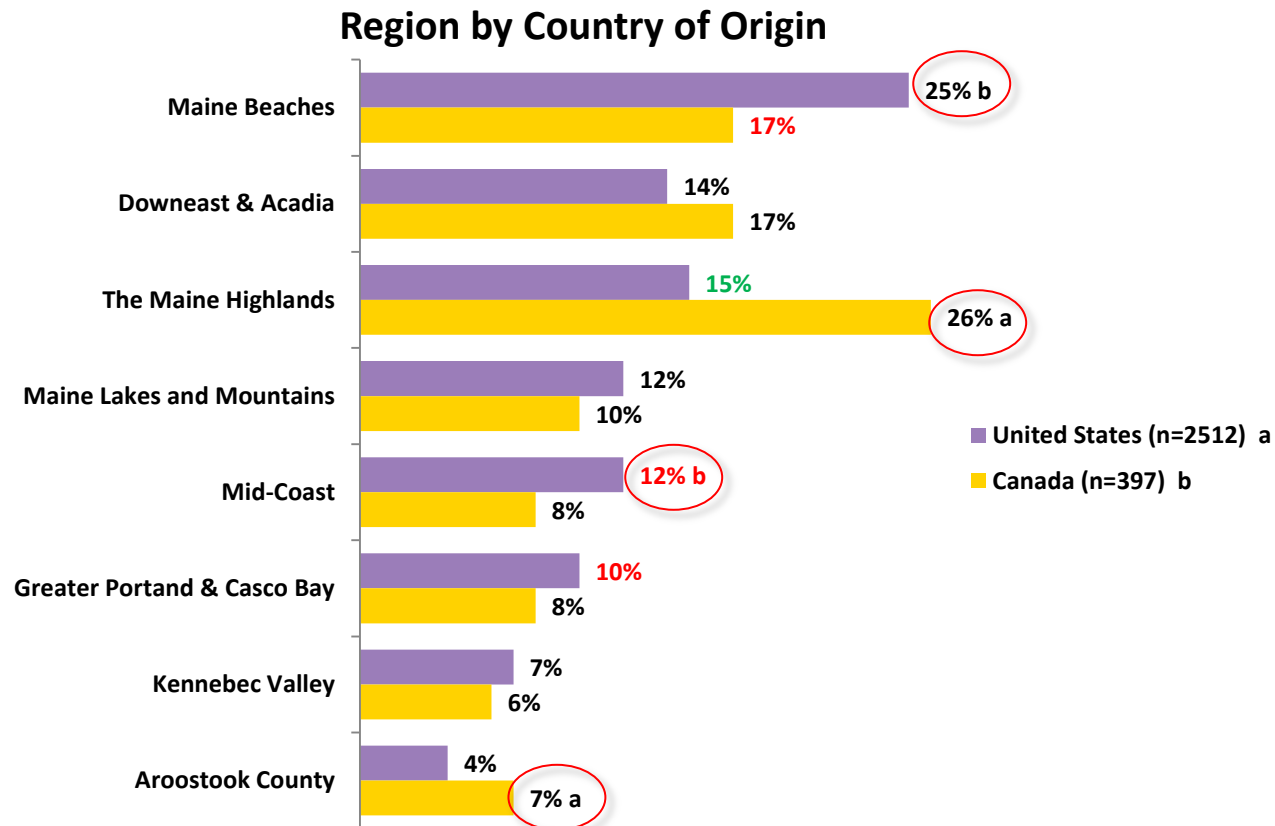
Q27. What other regions, if any, did you visit while you were in Maine?

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

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

Canadian and American travelers differ in some of the primary regions they visit in Maine.

- Canadians are more likely than American travelers to visit the *Maine Highlands* and *Aroostook County*, two regions that offer convenient border crossings.
- American travelers are more likely than Canadians to visit the *Maine Beaches* and the *Mid-Coast* region.



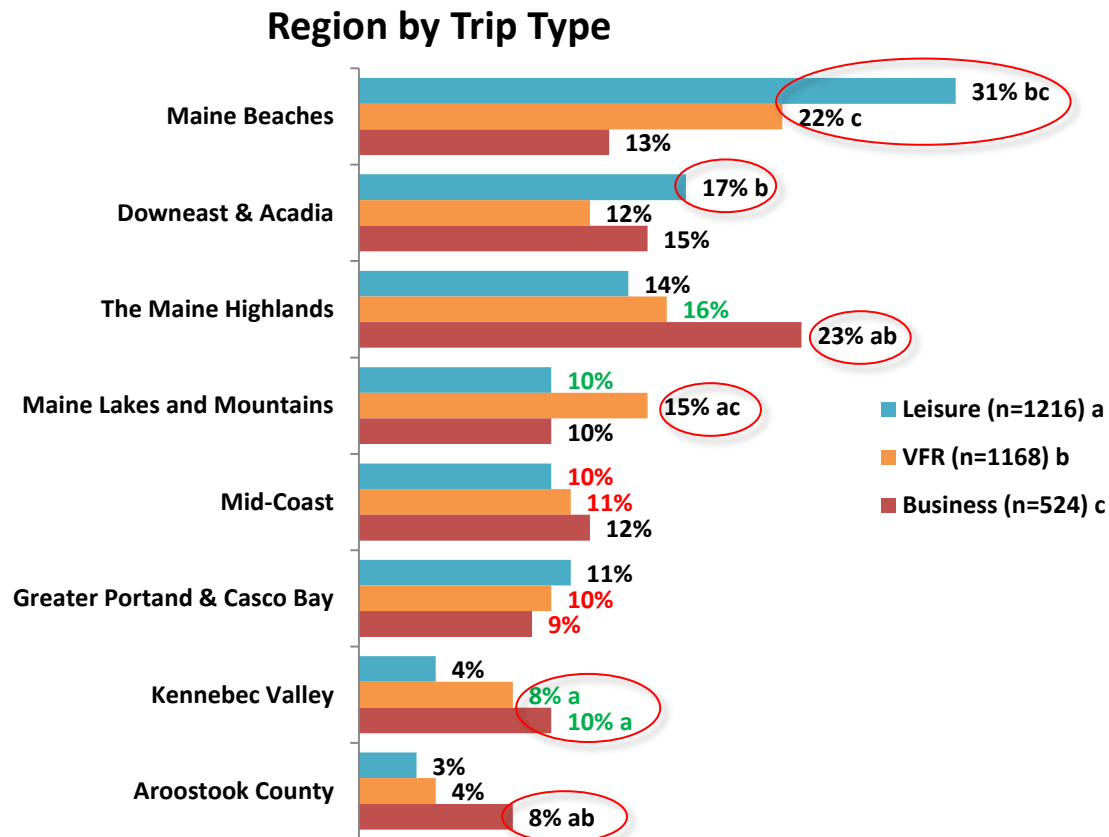
Q25. What region in Maine was your primary destination?

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

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

Trip type is also related to the primary Maine region travelers visit.

- The top visited region for business travelers is the *Maine Highlands* region, while the top visited region for leisure and VFR travelers is the *Maine Beaches* region.



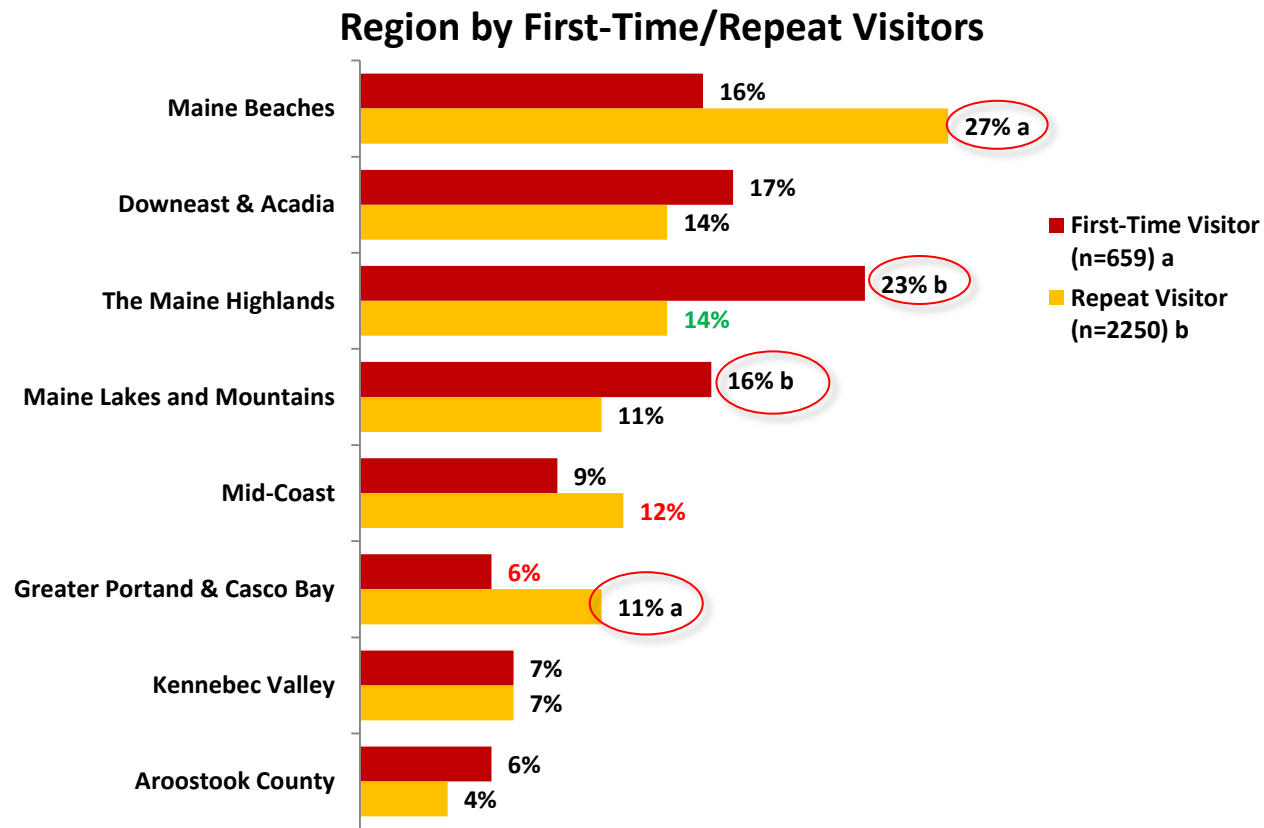
Q25. What region in Maine was your primary destination?

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

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

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

- First-time overnight visitors are more likely than repeat visitors to be visiting the *Maine Highlands* and the *Lakes and Mountains* regions, while repeat visitors are more likely to be visiting the *Maine Beaches* and the *Greater Portland/Casco Bay* regions.

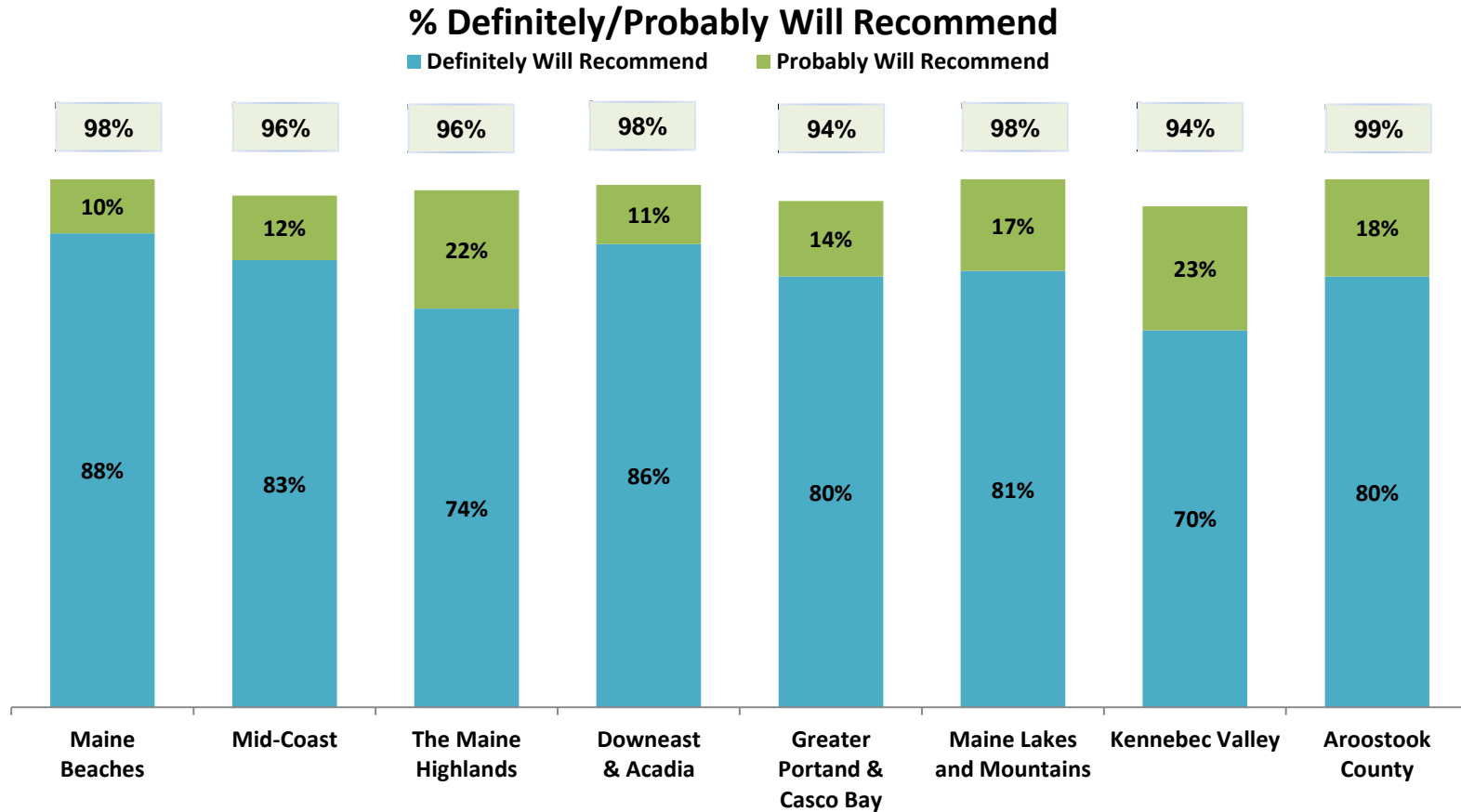


Q25. What region in Maine was your primary destination?

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

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

Overnight visitors overwhelmingly express a willingness to recommend the primary region they visited.

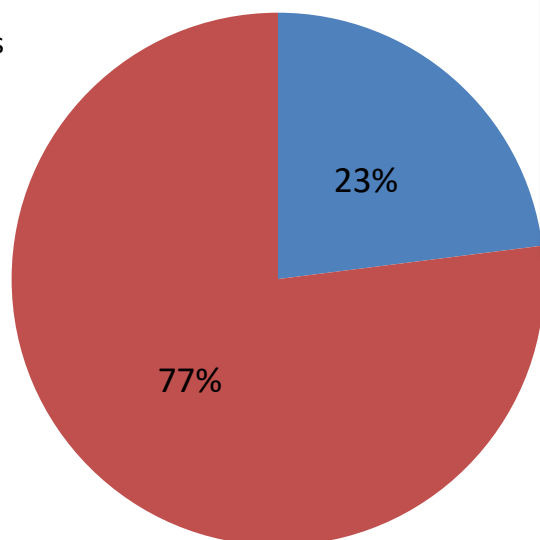


Three-fourths of Maine's overnight visitors stayed in Maine for their entire trip.

- Among the 23% who did visit nearby states/provinces while traveling to Maine, the highest proportion spent some time in nearby New Hampshire (49%).
- American travelers from outside New England, as well as first-time visitors, are more likely to have visited other states while on a trip to Maine.

Visited Nearby States/Provinces
2016 (n=2909)

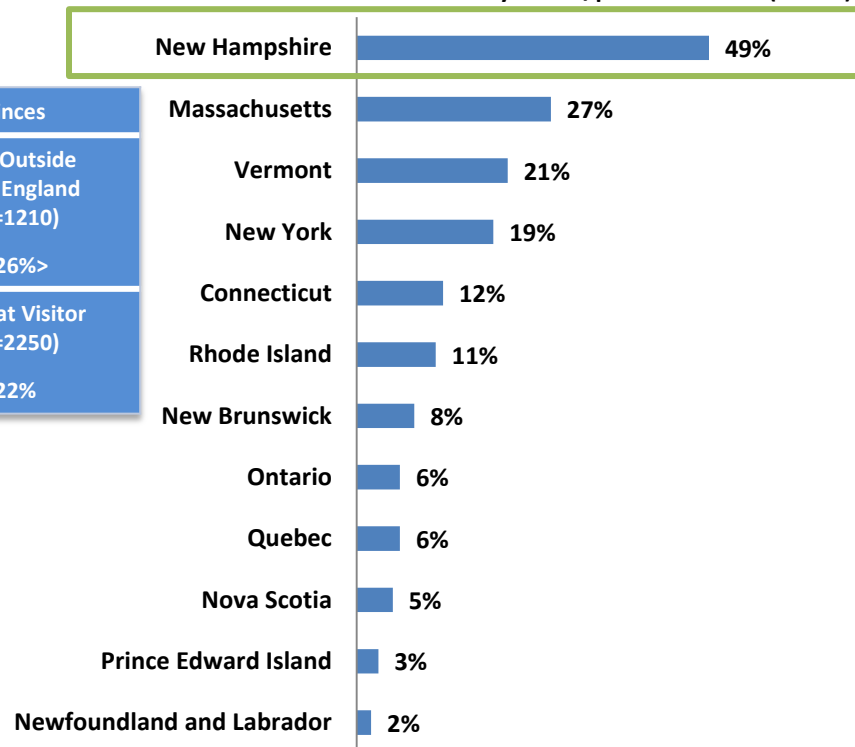
■ Yes
■ No



Visited Other States/Provinces	
Live in New England (n=1302)	Live Outside New England (n=1210)
19%	<26%>
First-Time Visitor (n=659)	Repeat Visitor (n=2250)
<28%>	22%

State/Province of Residence Visited

■ Travelers who also visited nearby states/provinces 2016 (n=665)



Q16. On this [Trip Type] to Maine, did you also visit any other nearby states or provinces?

Q17. What other states or provinces did you visit on this same trip?

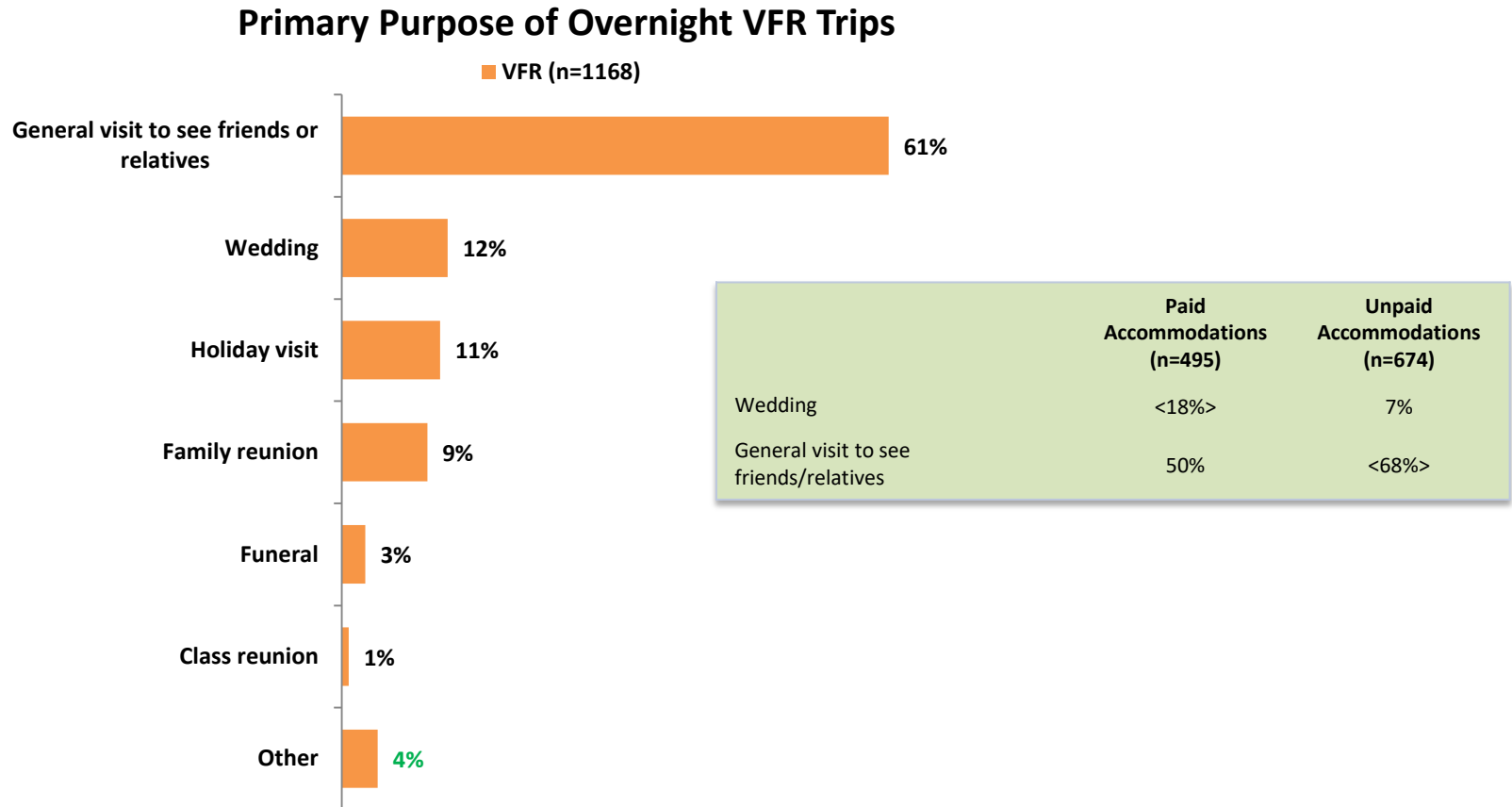
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Overnight Visitor Interest Areas and Activities

Overnight VFR trips to Maine in 2016 were most frequently a general visit to see friends or relatives.

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



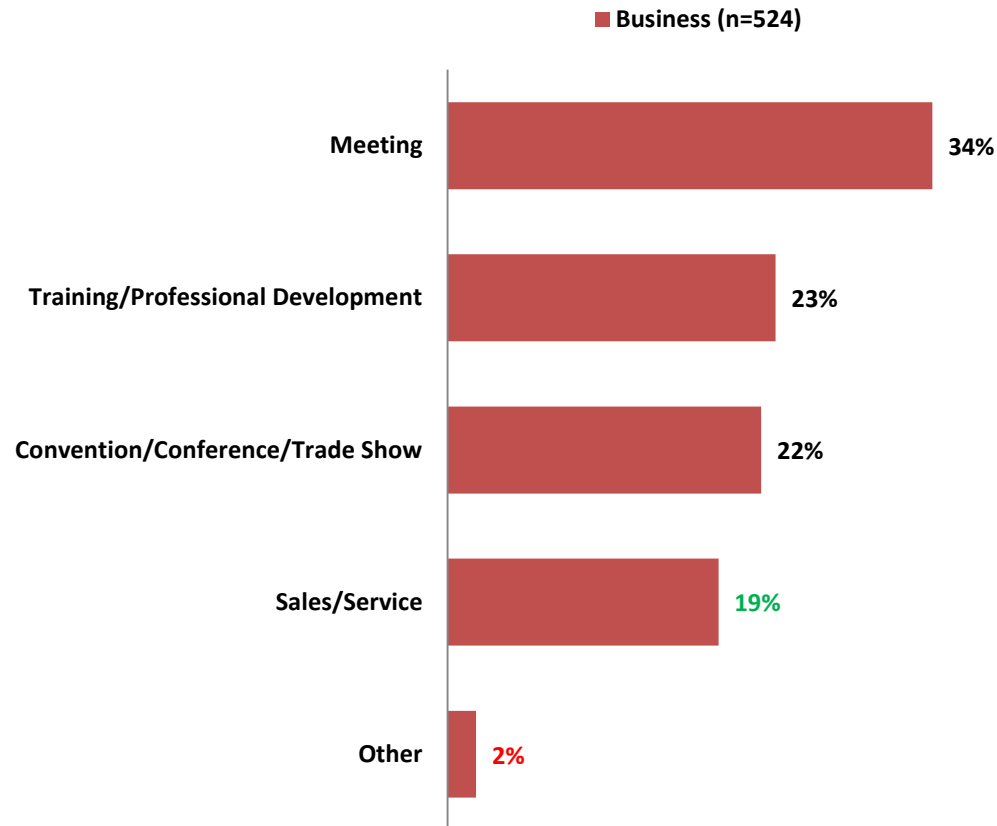
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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

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

Business travelers are most likely to come to Maine for a general meeting.

Primary Purpose of Overnight Business Trips



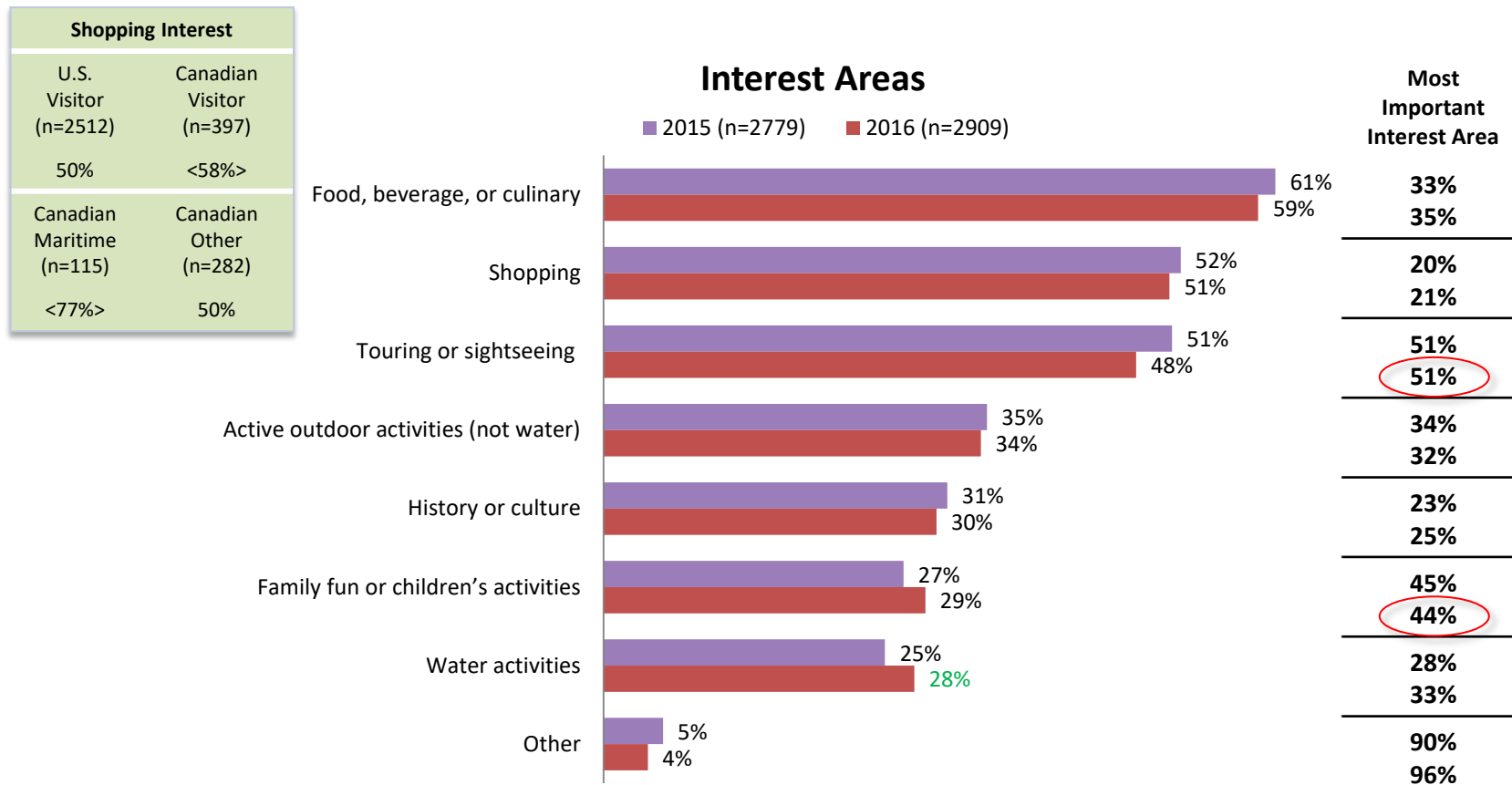
Q8. What was the primary purpose of your most recent business trip in Maine?

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

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

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

- Among those interested in *touring/sightseeing*, half (51%) rank it as the most important in their decision to visit Maine. A slightly lower proportion of those who are interested in *family fun or children's activities* (44%) say that interest is the most important.

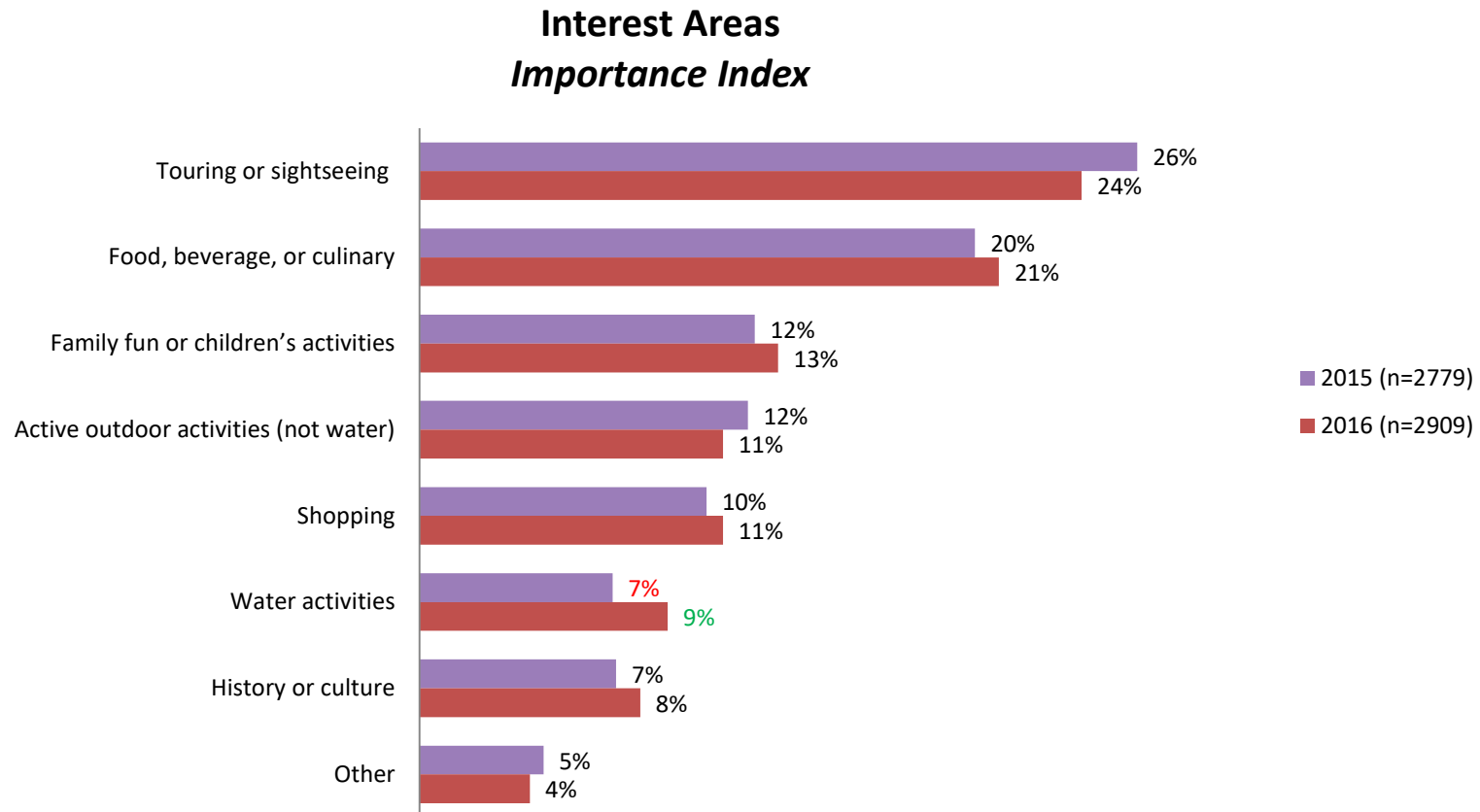


Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 55

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

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



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

Q32. Which of the following **interest areas** did you want to pursue during this trip to Maine? *Please check all that apply.*

Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 56

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

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

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

- Younger travelers (<45 yrs) are more likely to be interested in all but two interest areas, as shown in the table below. Repeat visitors are more likely to be interested in *shopping* while in the State.
- As expected, *active outdoor activities*, *water activities*, and *family fun/children's activities* are all more popular with travel parties that include children.

Interest Area	2016 TOTAL (n=2909)	Kids on Trip		First-Time/Repeat		Age	
		Kids (n=955) a	No Kids (n=1954) b	First-Time (n=659) c	Repeat (n=2250) d	< 45 yrs (n=1633) e	45+ yrs (n=1276) f
Food, beverage, or culinary	59%	59%	60%	59%	62%	59%	61%
Shopping	51%	52%	51%	46%	53% c	50%	52%
Touring or sightseeing	48%	49%	48%	51%	48%	51% f	45%
Active outdoor activities (not water)	34%	39% b	31%	33%	34%	40% f	26%
History or culture	30%	31%	29%	35% d	28%	33% f	26%
Family fun or children's activities	29%	60% b	13%	27%	29%	35% f	21%
Water activities	28%	38% b	23%	29%	28%	32% f	23%
Other	4%	2%	5% a	1%	5% c	2%	7% e

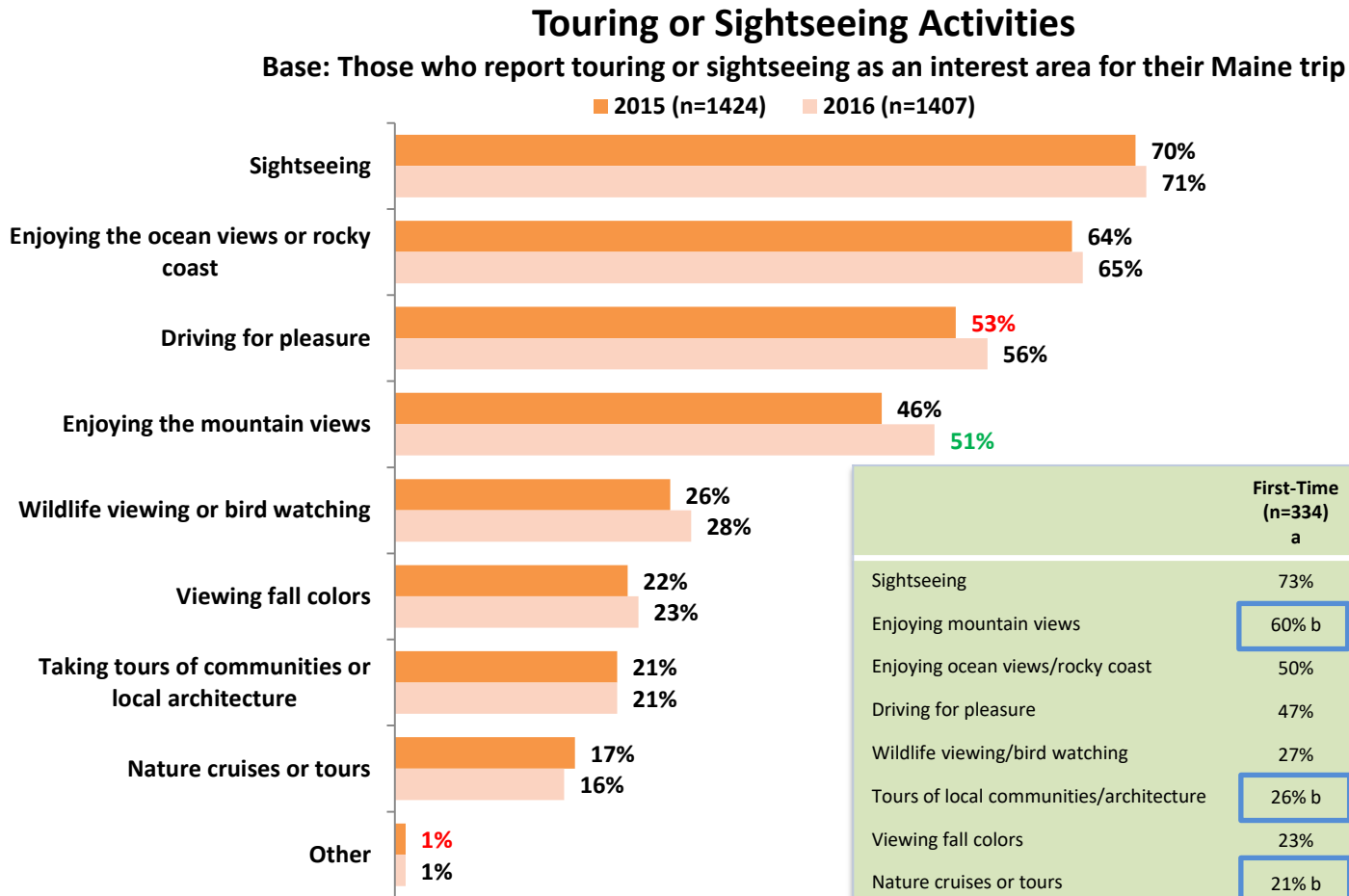
Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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

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

Looking specifically at the visitors who list touring/sightseeing as a broad interest area, *general sightseeing* activities are the most popular.

- Following as a close second is *enjoying the ocean views or rocky coast*.
- Enjoying the mountain views* is mentioned more often in 2016 than it was in 2015.



	First-Time (n=334) a	Repeat (n=1073) b	Kids (n=471) c	No Kids (n=936) d
Sightseeing	73%	71%	68%	73%
Enjoying mountain views	60% b	48%	59% d	47%
Enjoying ocean views/rocky coast	50%	70% a	64%	66%
Driving for pleasure	47%	59% a	55%	57%
Wildlife viewing/bird watching	27%	29%	33% d	26%
Tours of local communities/architecture	26% b	20%	24%	19%
Viewing fall colors	23%	23%	23%	23%
Nature cruises or tours	21% b	14%	16%	16%

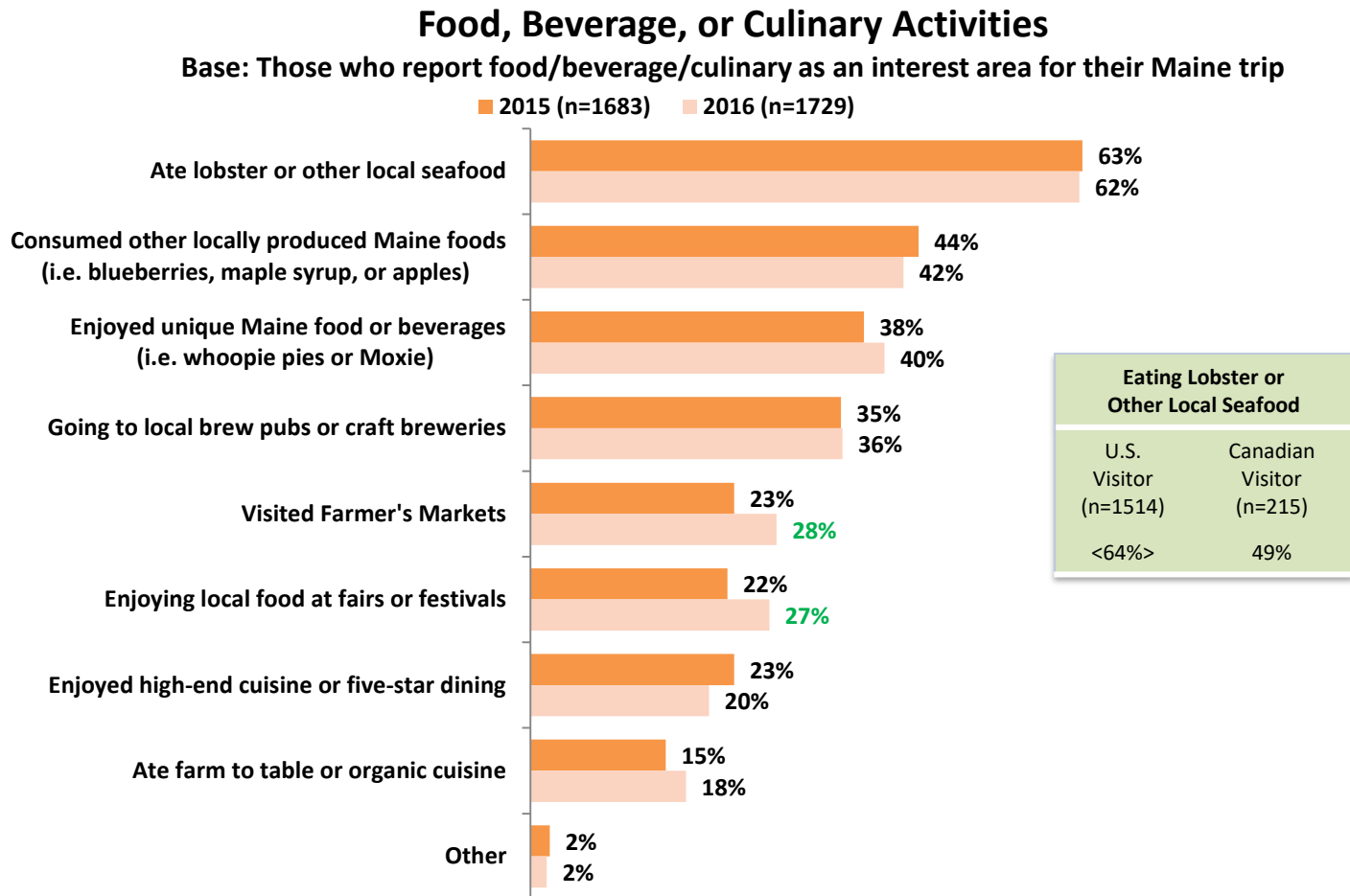
Q34. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

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

- Eating lobster or other local seafood is more popular among domestic visitors than it is among Canadian visitors (64% versus 49%).



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

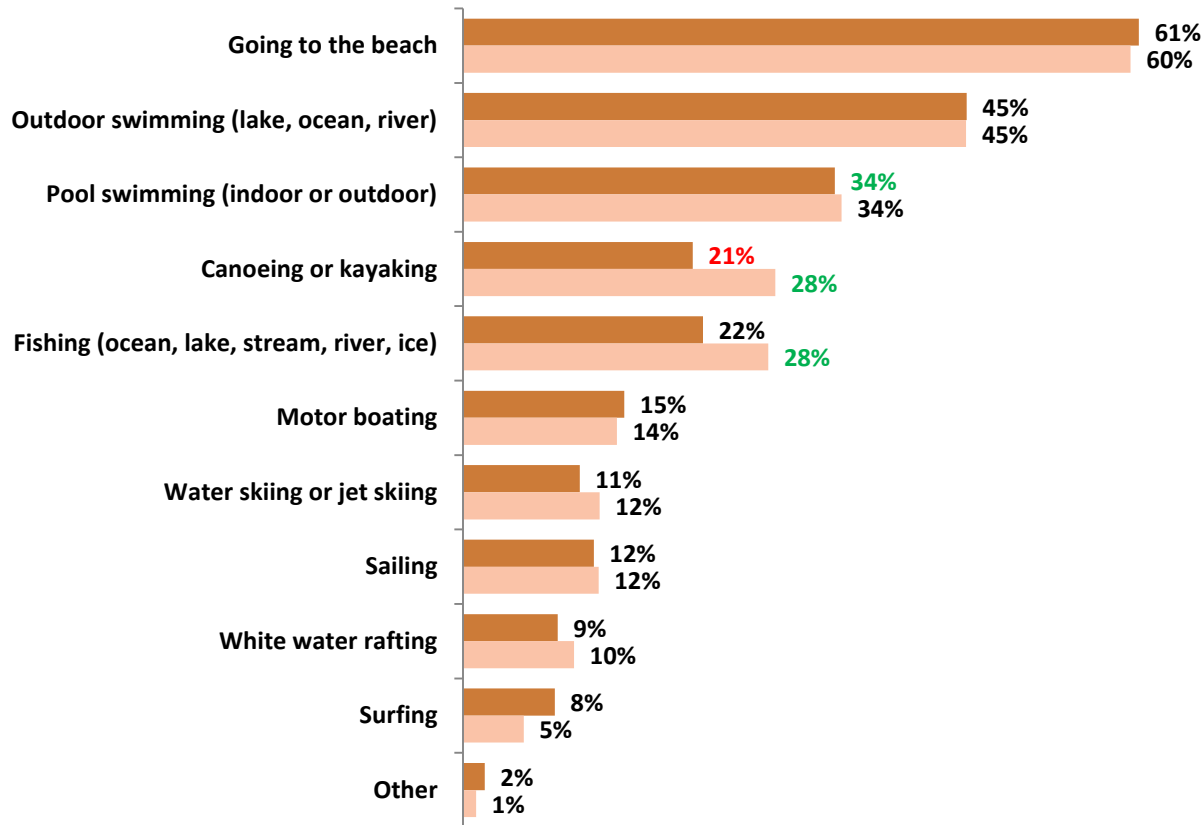
Going to the beach is the most frequently cited water activity among visitors selecting this interest area.

- Canoeing/kayaking and fishing appear to be more popular in 2016 than they were in 2015.

Water Activities

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

2015 (n=705) 2016 (n=823)



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

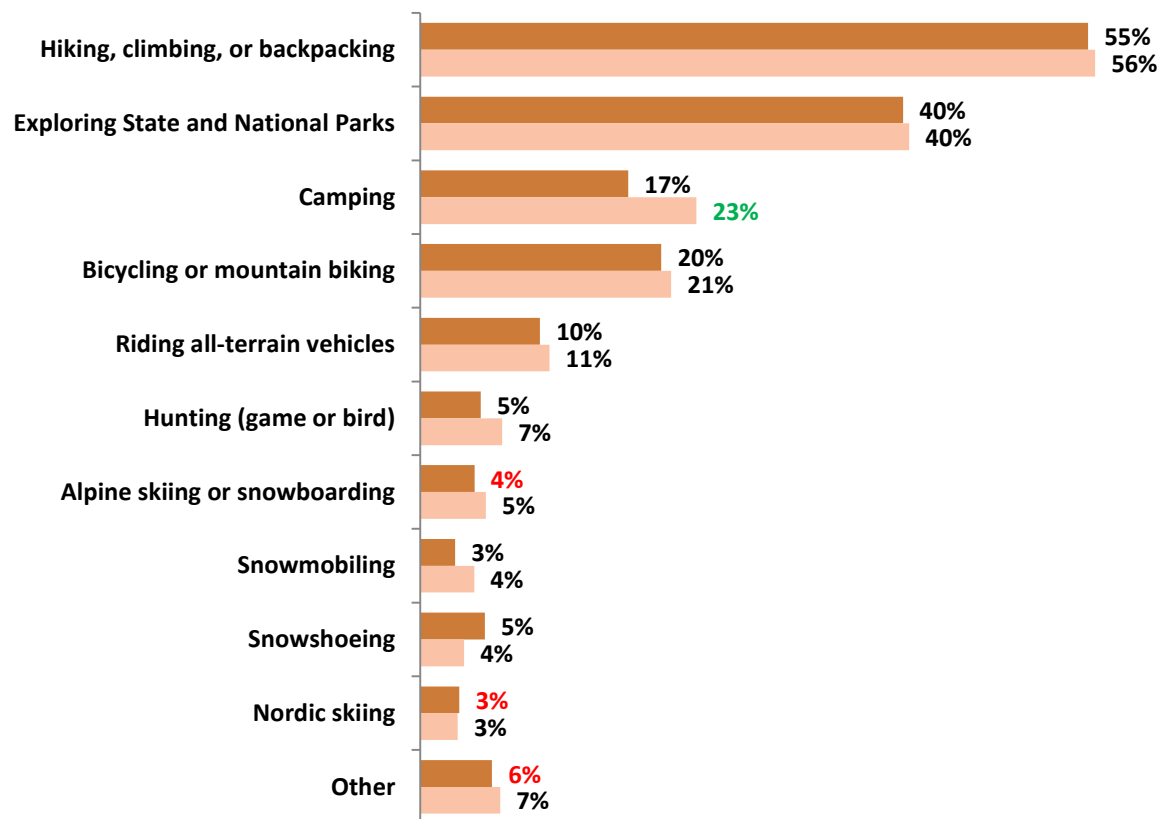
Hiking/climbing/backpacking and exploring State/National Parks are the top activities for visitors interested in outdoor recreation.

- In 2016, a higher proportion of visitors interested in active outdoor activities report having gone *camping* as compared to visitors in 2015.

Active Outdoor Activities – Non-Water

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

■ 2015 (n=961) ■ 2016 (n=985)



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

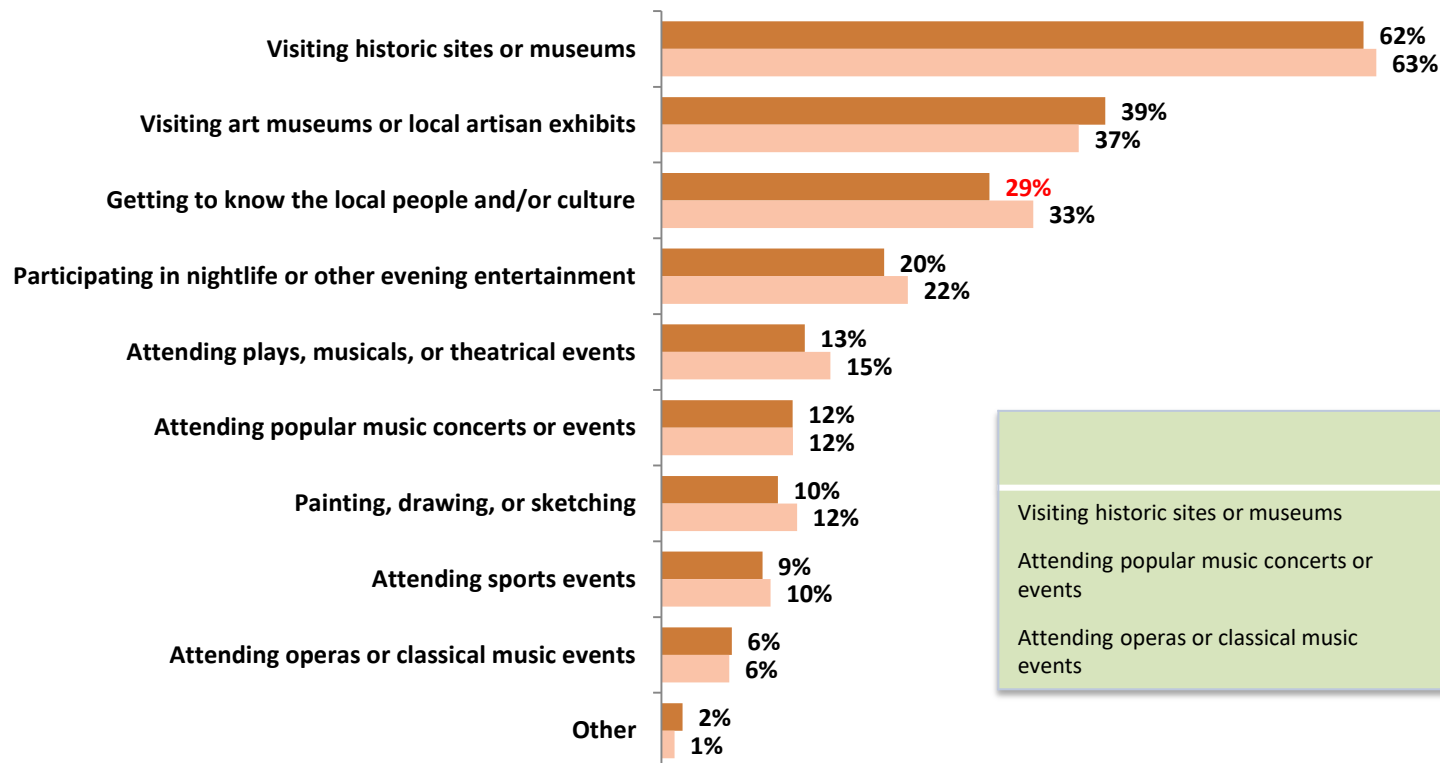
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

History or Culture Activities

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

2015 (n=861) 2016 (n=868)



	U.S. Visitors (n=739)	Canadian Visitors (n=129)
Visiting historic sites or museums	<65%>	56%
Attending popular music concerts or events	11%	<17%>
Attending operas or classical music events	5%	<11%>

Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

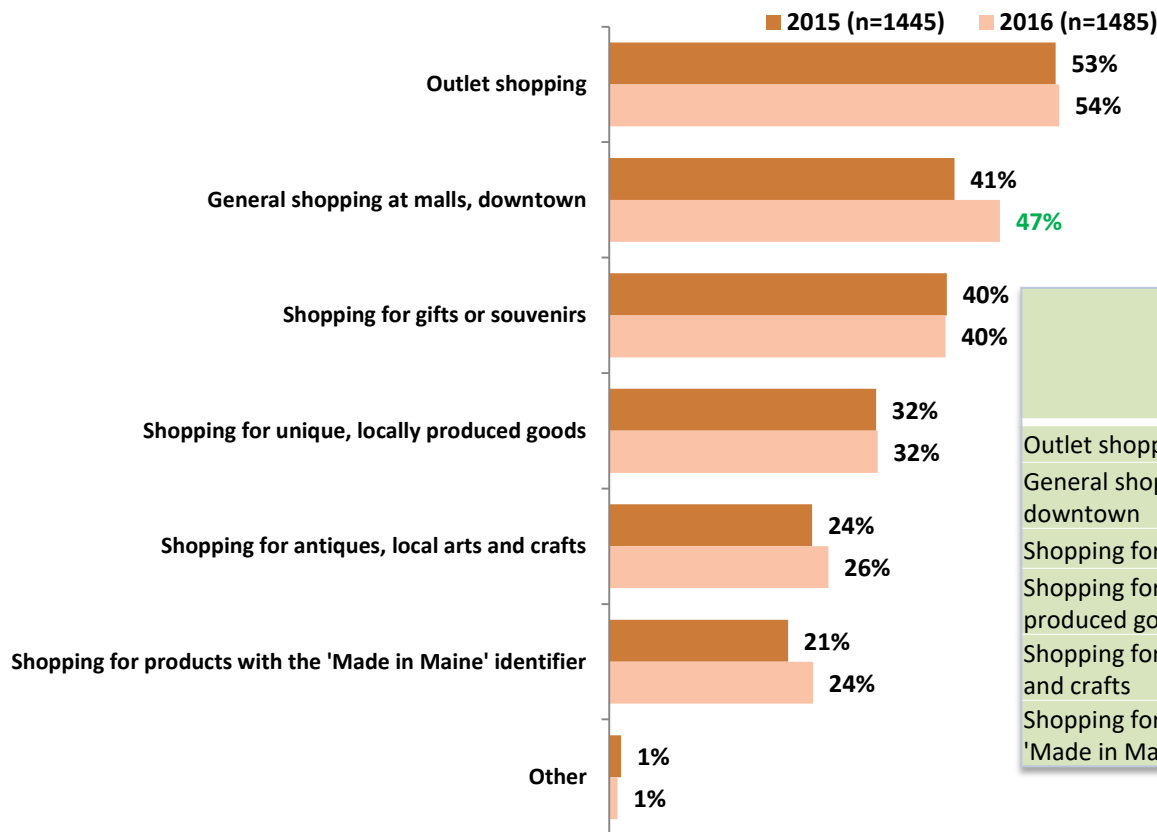
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of overnight visitors who are interested in shopping engage in *outlet shopping* or *general mall shopping* while in Maine.

- In-state visitors are more likely than out-of-state visitors to do some *general shopping at malls or downtown*.
- *Outlet shopping* is most popular among out-of-state New England residents, while *gift or souvenir shopping* and *shopping for locally produced goods* are most popular among domestic visitors who live outside of New England.

Shopping Activities

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



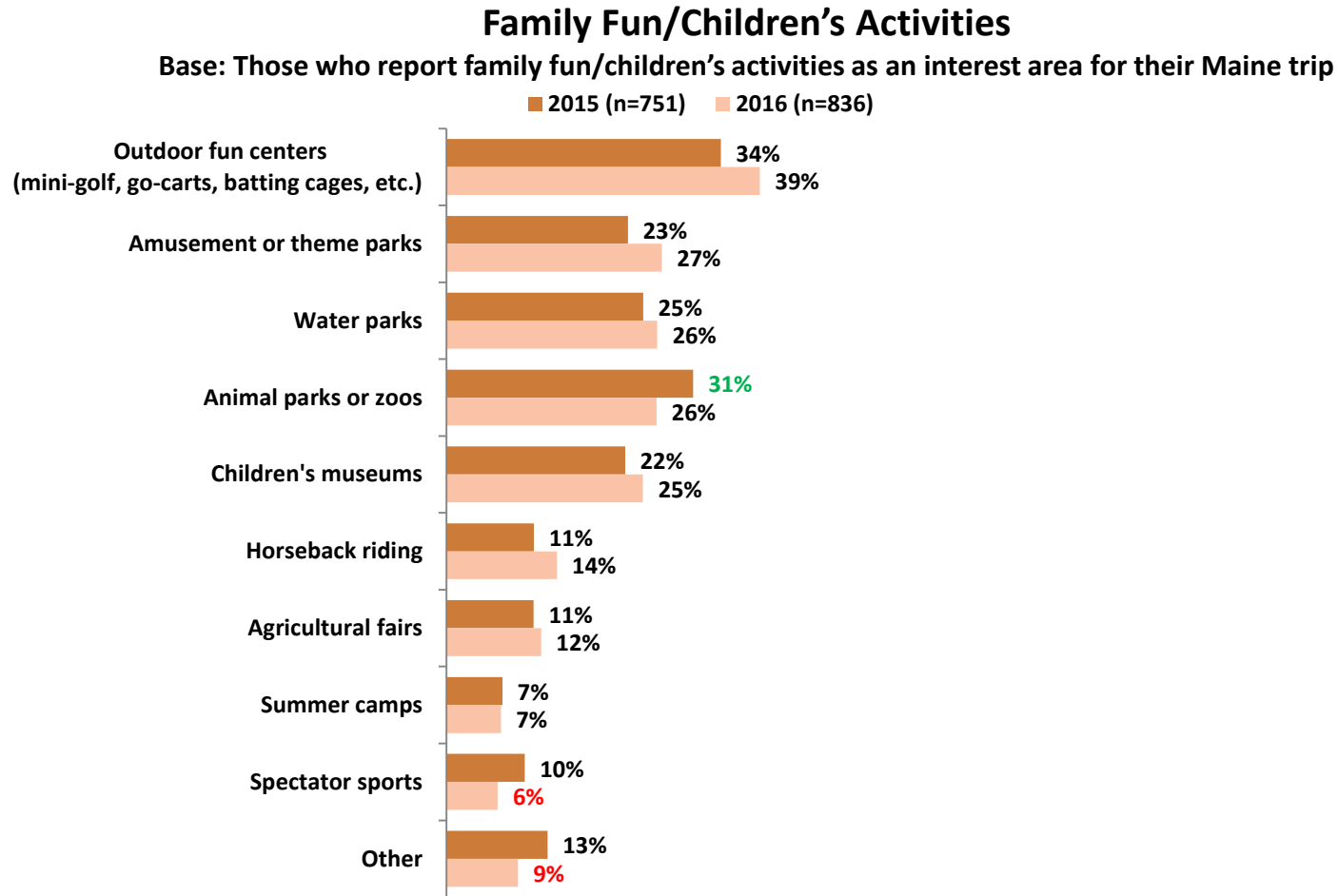
	Maine (n=88) a	New England (n=593) b	Other U.S. (n=574) c	Canada (n=229) d
Outlet shopping	46%	61% ac	47%	54%
General shopping at malls, downtown	74% bcd	38%	46% b	59% bc
Shopping for gifts or souvenirs	28%	37%	48% abd	33%
Shopping for unique, locally produced goods	23%	29%	38% abd	28%
Shopping for antiques, local arts and crafts	21%	29% d	27% d	17%
Shopping for products with the 'Made in Maine' identifier	27%	21%	29% bd	18%

Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

Outdoor fun centers are the most popular activities for those visitors who are interested in family fun/children's activities.



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

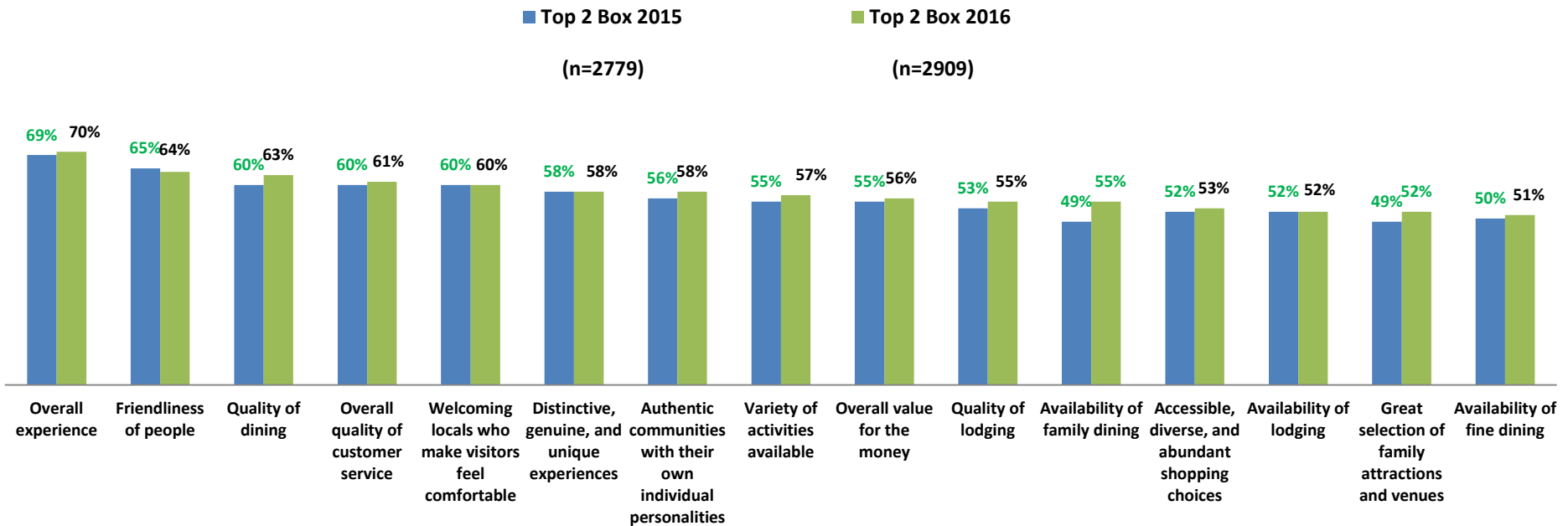
Overnight Visitor Evaluations

Maine rises well above visitor expectations for *overall experience* and several other categories.

2016 Annual Report

- At least half of overnight visitors report that Maine either *far exceeded their expectations* or was *somewhat above their expectations* in each of the tested categories.
- Maine was more likely to exceed visitor expectations in 2016 for *availability of family dining* and *great selection of family attractions and venues* than in 2015.

Maine Far Exceeded/Somewhat Above My Expectations



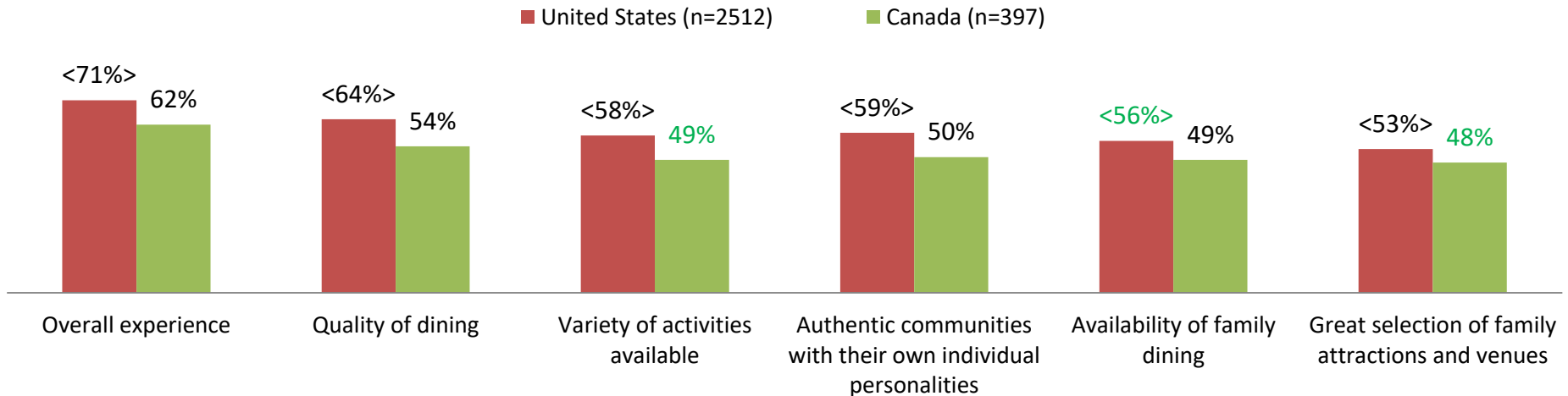
Q38. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

Maine is more likely to *exceed expectations* on several attributes among American visitors than among Canadians.

- American overnight visitors were more impressed with the *availability of family dining* in 2016, as compared to 2015.
- Higher proportions of Canadian overnight visitors in 2016 reported that Maine exceeded their expectations, as compared to 2015, on three attributes:
 - Variety of activities available,
 - Great selection of family attractions and venues, and
 - Offering a distinctive, genuine, and unique experience.

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



Q38. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

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

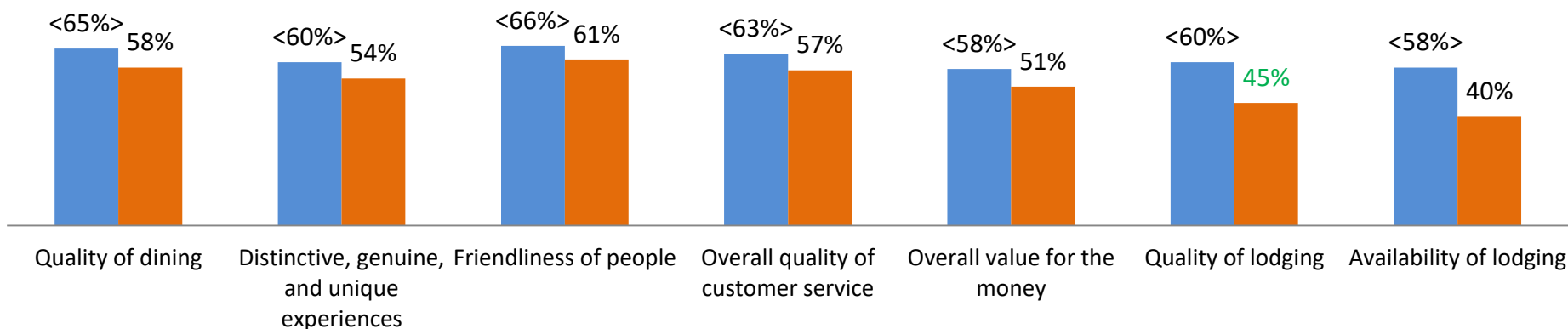
Visitors staying in paid accommodations give higher expectation ratings to several attributes, as compared to visitors staying in unpaid accommodations.

- Additional sub-groups that are more likely than their counterparts to report Maine exceeds their expectations on most attributes include:
 - Visitors traveling with children, and
 - Visitors under the age of 45.

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

■ Paid Accommodations (n=1909)

■ Unpaid Accommodations (n=1000)



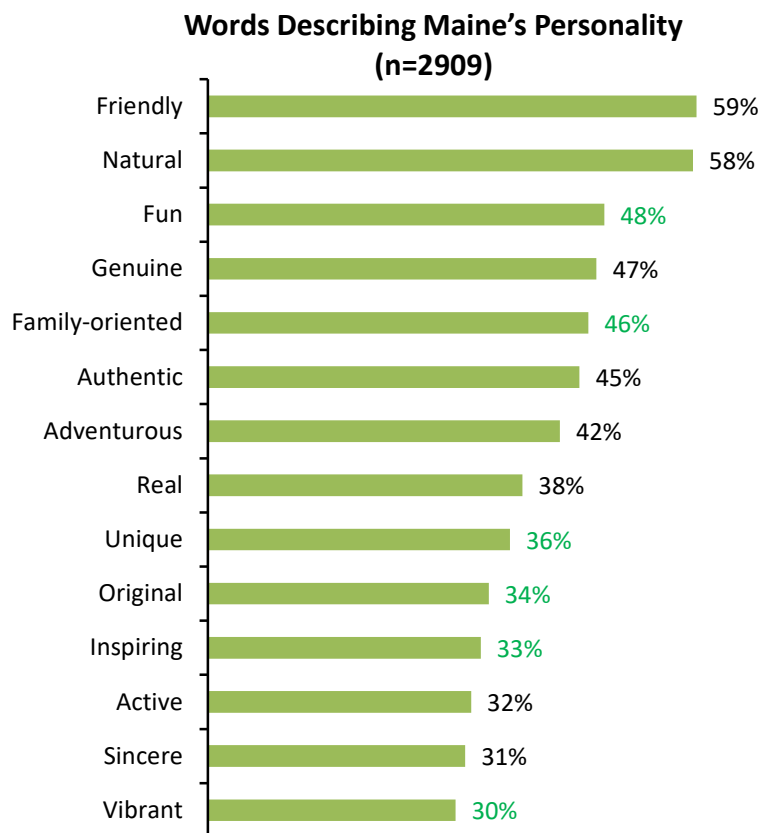
Q38. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

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

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

- Several words were selected by a higher proportion of visitors in 2016 than in 2015, including *fun*, *family-oriented*, *unique*, *original*, *inspiring*, *creative*, and *passionate*.



Less Frequently Mentioned	
Creative	25%
Old-fashioned	25%
Open-minded	21%
Passionate	20%
Enthusiastic	20%
Imaginative	19%
Dynamic	16%
Quirky	12%
Unexpected	8%
Reserved	8%
Offbeat	7%
Unusual	6%
Unconventional	5%
Stodgy	1%
Uninspiring	1%
Unpleasant	1%
Boring	1%
Fake	1%

Q44. If Maine were a person, which of the following words would you choose to describe its personality?

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

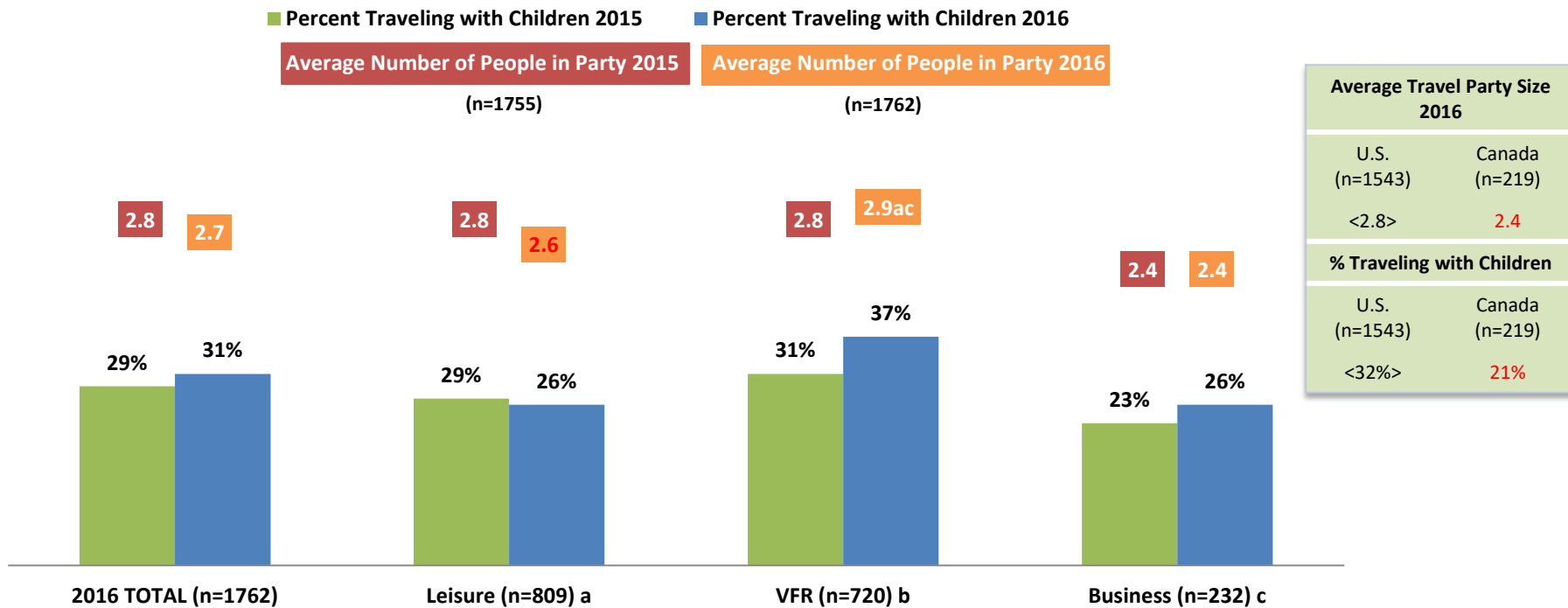
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitor Travel Logistics

Similar to overnight visitors, day visitors travel to Maine in groups of two to three, and one-third bring children.

- Americans travel in larger groups than Canadian visitors, and are also more likely to be traveling with children.
- Canadian day visitors traveled in smaller groups in 2016, as compared to 2015, and also were less likely to travel with children in 2016.

Travel Party Size and Composition



Q15. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

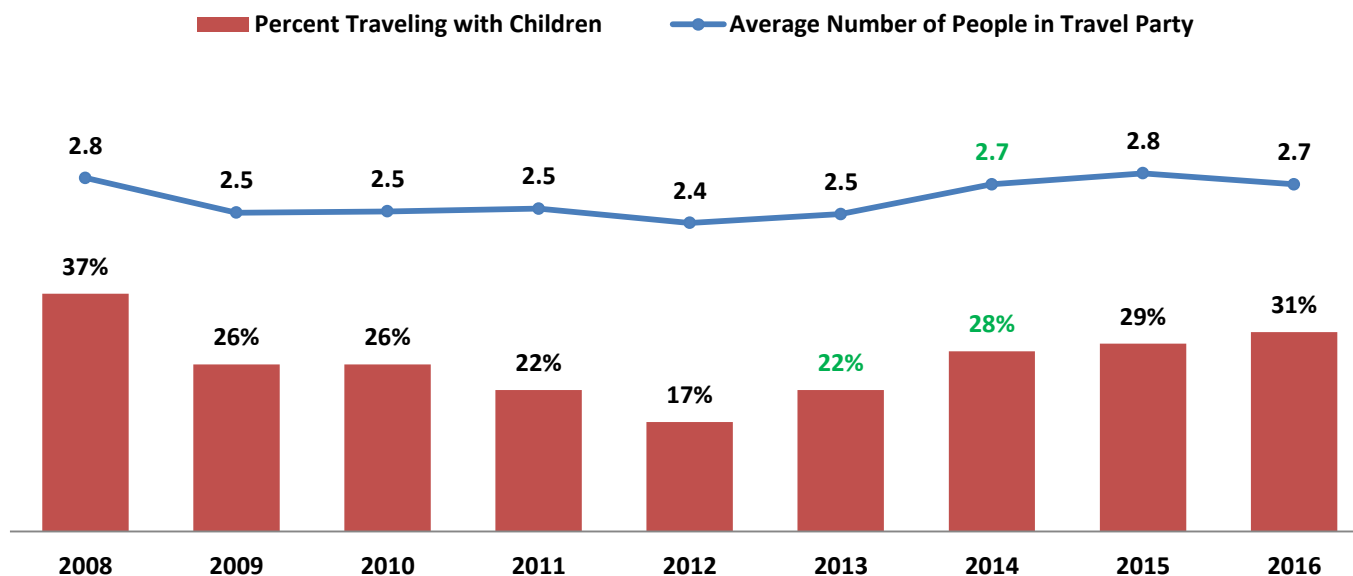
Q16. How many of these people were: Children?

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

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

After two years of increases in the proportion of day visitors traveling with children, the 2015 and 2016 proportions have remained consistent.

Travel Party Size and Composition



Q15. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q16. How many of these people were: Children?

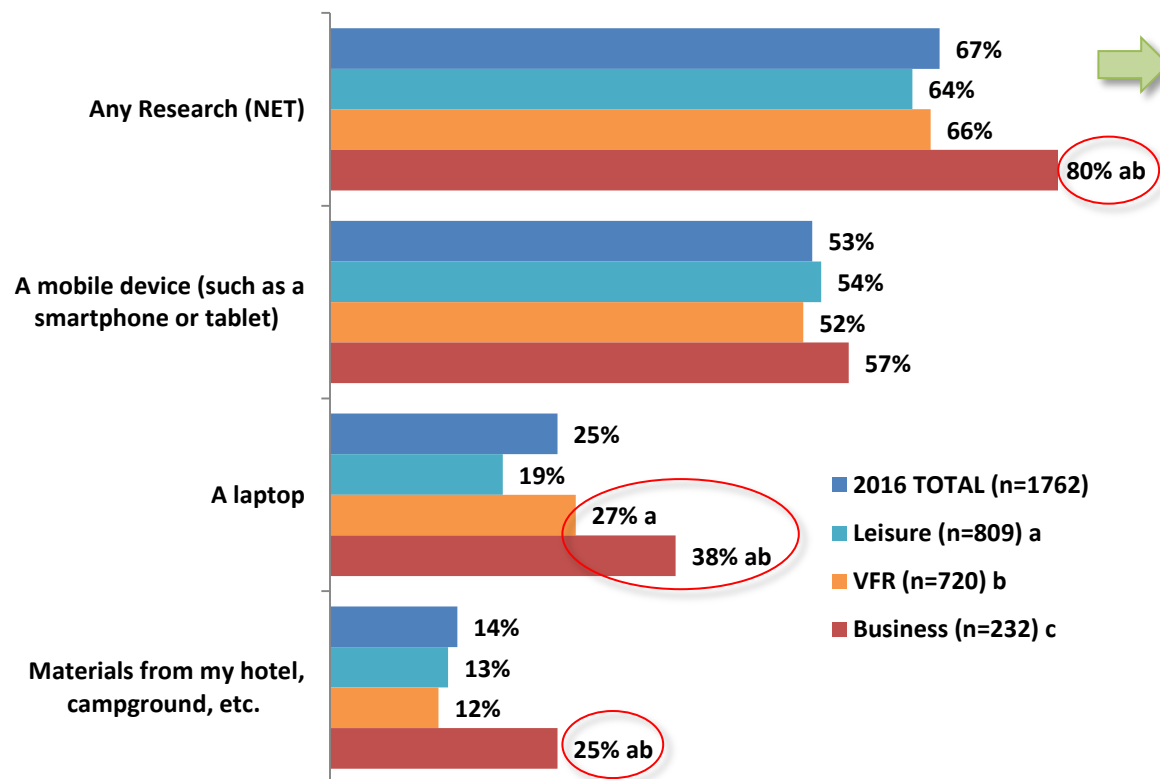
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

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

- Several types of travelers are more apt than their counterparts to continue researching Maine while in the State, including *business travelers, first-time visitors, younger travelers, Canadians, and those traveling with children.*
- Travelers who used their mobile device or laptop for additional research while in Maine reported mostly accessing apps/websites such as *Google, Google Maps, TripAdvisor, yelp, or other Maine websites.*

Trip Research While in Maine



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

First time	Repeat
<92%>	65%
<44 yrs	45+ yrs
<80%>	56%
U.S. Visitors	Canadian Visitors
65%	<77%>
Kids on Trip	No Kids
<78%>	62%

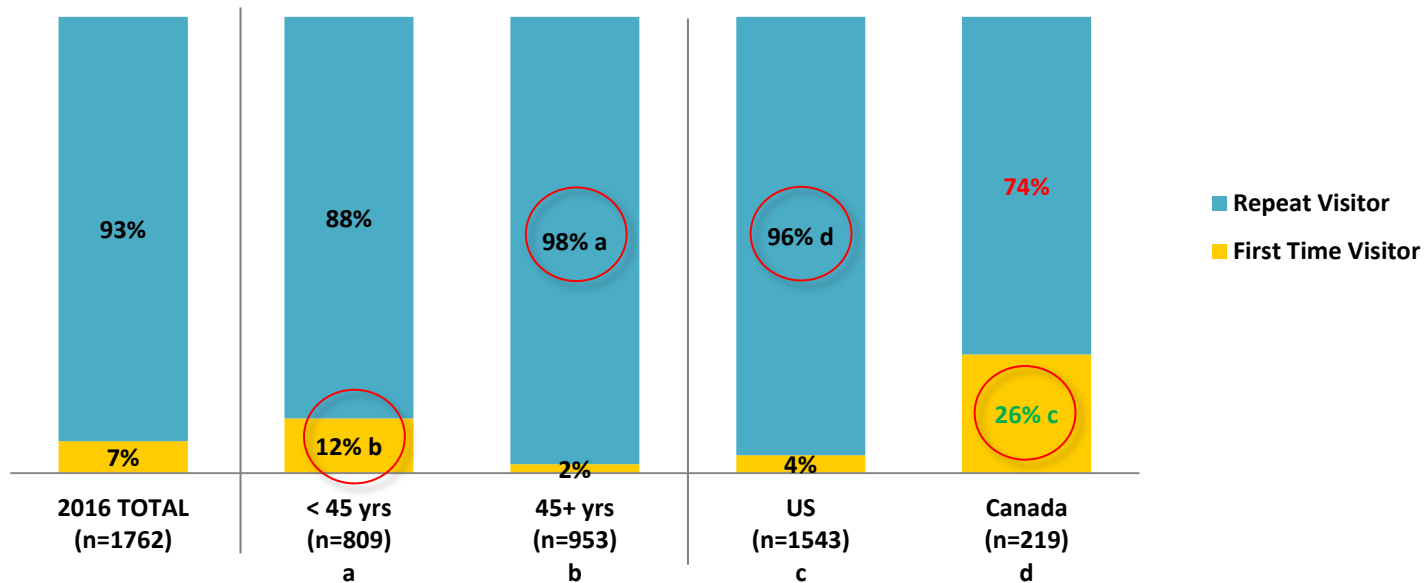
Q25. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Day visitors illustrate continued evidence of strong loyalty, with 93% being repeat visitors.

- Canadian day visitors are more likely than domestic day visitors to be visiting Maine for the first time (26% versus 4%), as are those under the age of 45 (12% versus 2%).
- 2016 showed an increase in the proportion of Canadians visiting for the first time (26% versus 17% in 2015).

Repeat vs. First Time Visitors



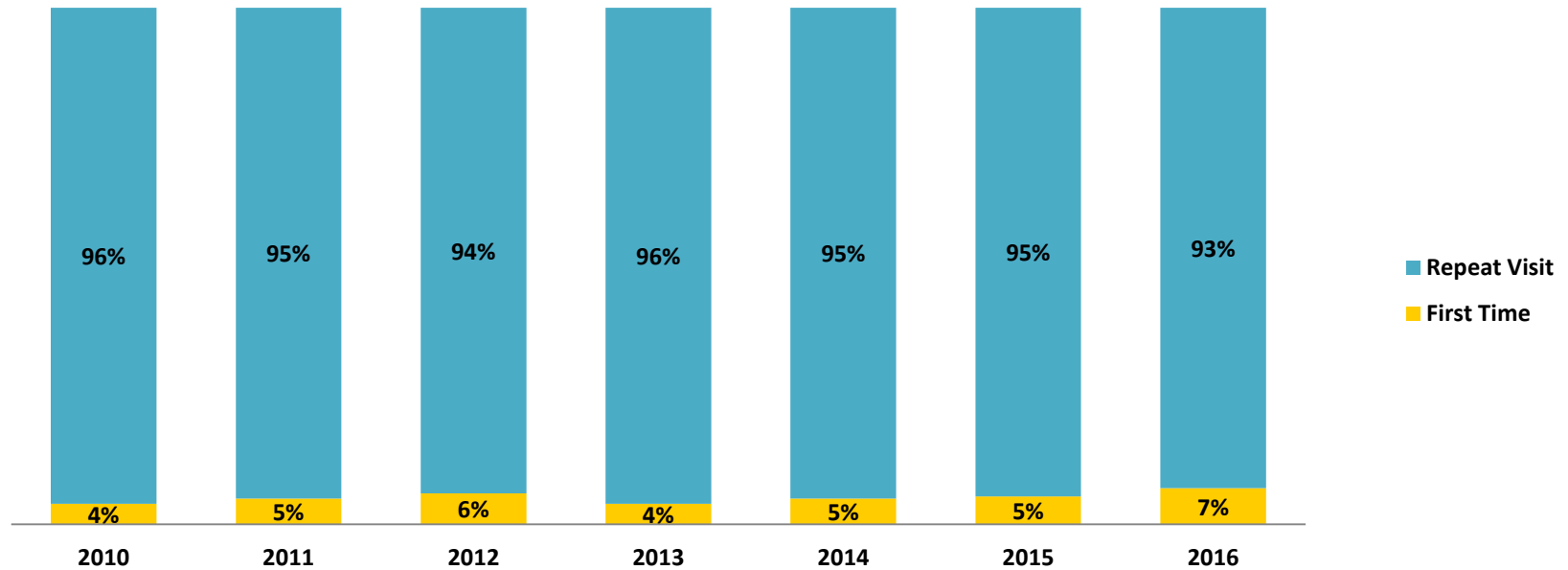
Q10. Was this your first trip to Maine?

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

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

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

Repeat vs. First Time Visitors Trend 2010 to 2016



Q10. Was this your first trip to Maine?

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

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

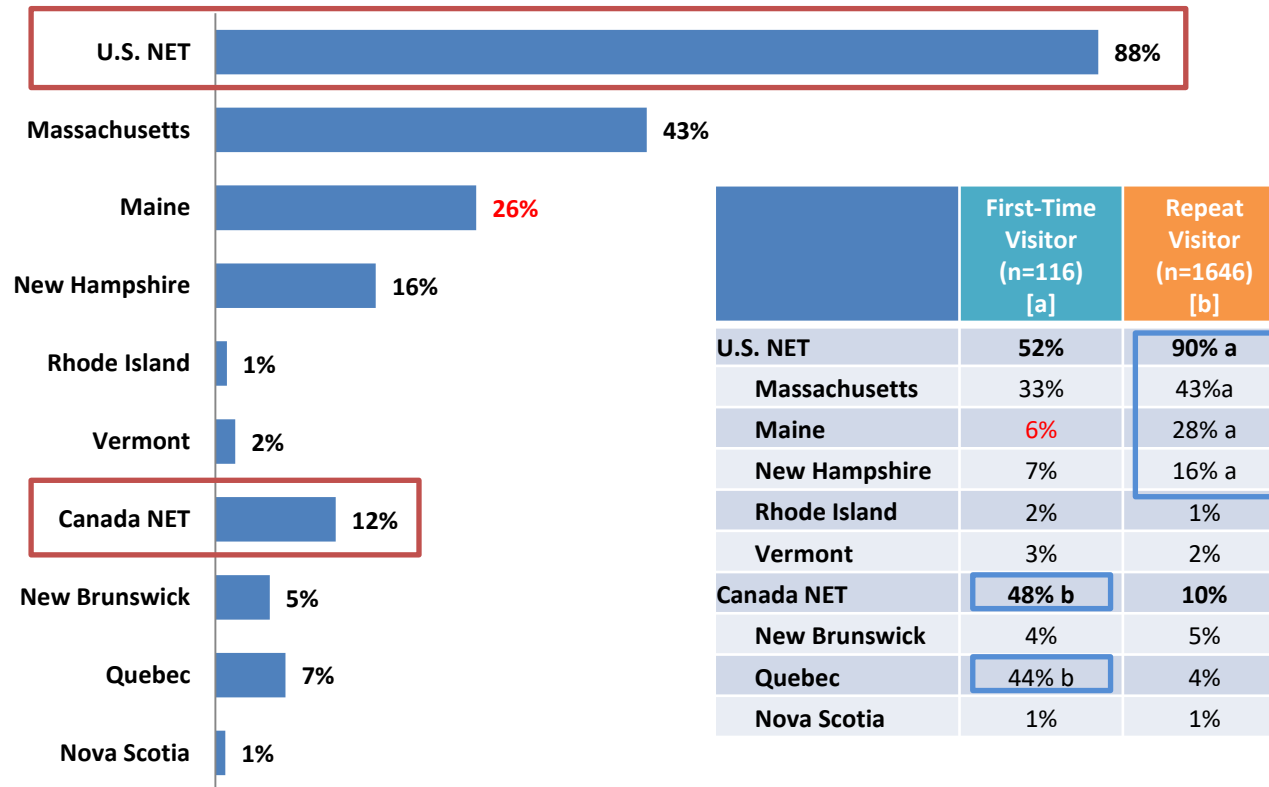
Day Visitor Origin

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

- Repeat day visitors are more likely to come from the U.S. than are first-time visitors.
- 2016 saw a lower proportion of in-state day visitors than 2015.

State/Province of Residence

■ 2016 NET (n=1762)



Q2. In which state or province do you live?

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

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

Day visitor origin varies by trip type.

- One-fifth of business travelers are from Canada, while only 7% of VFR travelers come from Canada.
- Conversely, nine in ten VFR travelers are from the U.S. (mostly Massachusetts and Maine), as are 85% of leisure travelers.

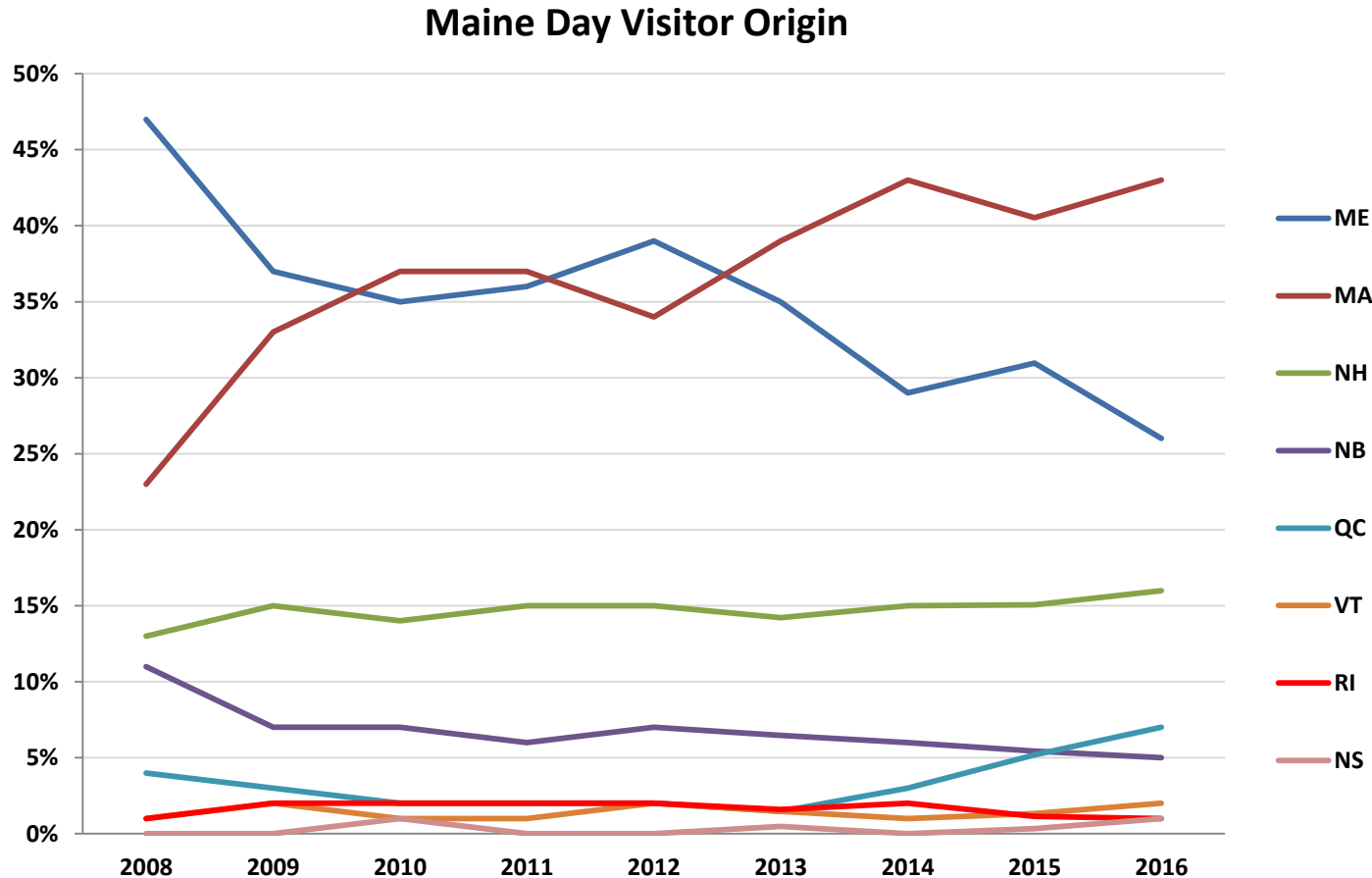
	2016 TOTAL (n=1762)	Leisure (n=809) [a]	VFR (n=720) [b]	Business (n=232) [c]
U.S. NET	88%	85%	93% ac	78%
Massachusetts	43%	47% c	41% c	33%
Maine	26%	17%	35% a	35% a
New Hampshire	16%	19% c	15% c	7%
Rhode Island	1%	2%	1%	1%
Vermont	2%	2%	2%	2%
Canada NET	12%	15% b	7%	22% b
New Brunswick	5%	7%	3%	4%
Quebec	7%	7%	3%	17% ab
Nova Scotia	1%	1%	1%	1%

Q2. In which state or province do you live?

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

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

The proportion of in-state day visitors appears to have declined between 2015 and 2016.



Q2. In which state or province do you live?

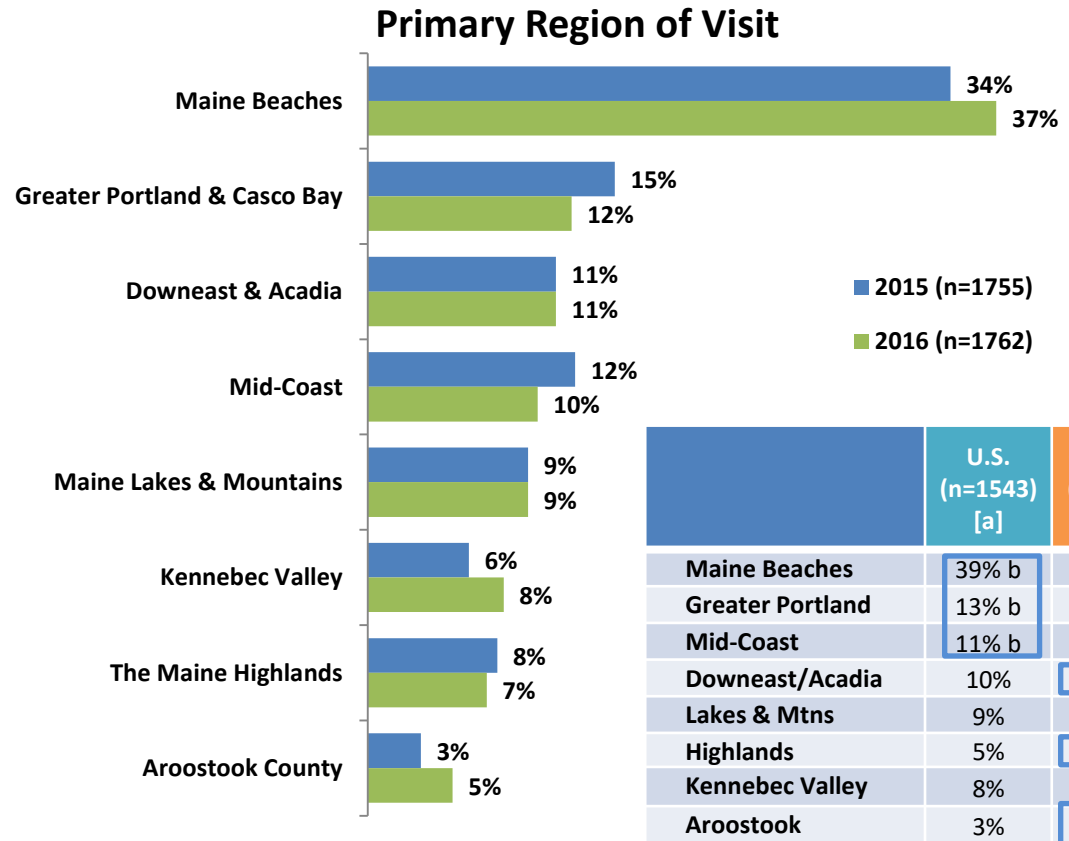
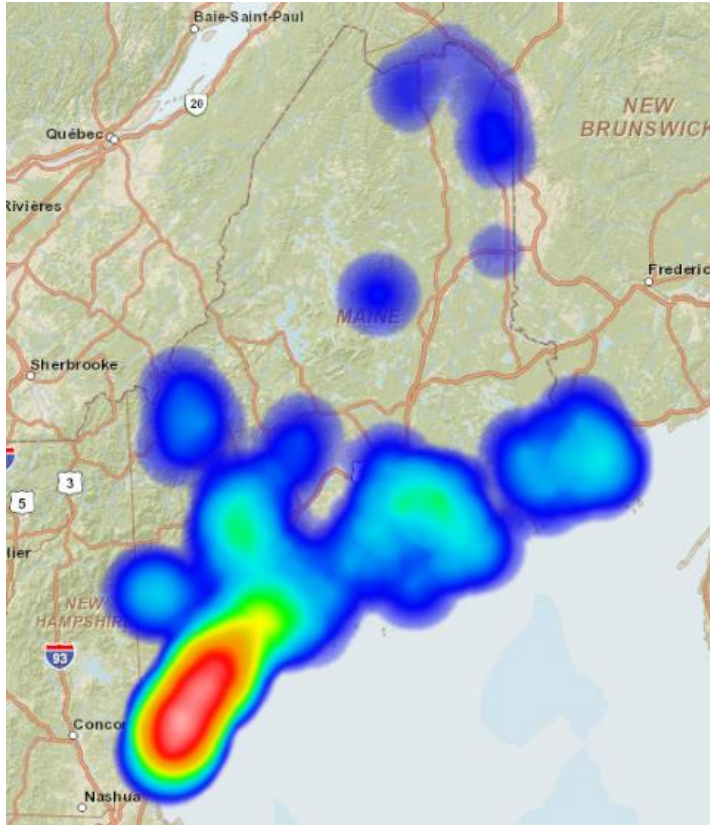
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Day Visitor Experience in Maine

Once again, day visitation centered around the Maine Beaches region in 2016.

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



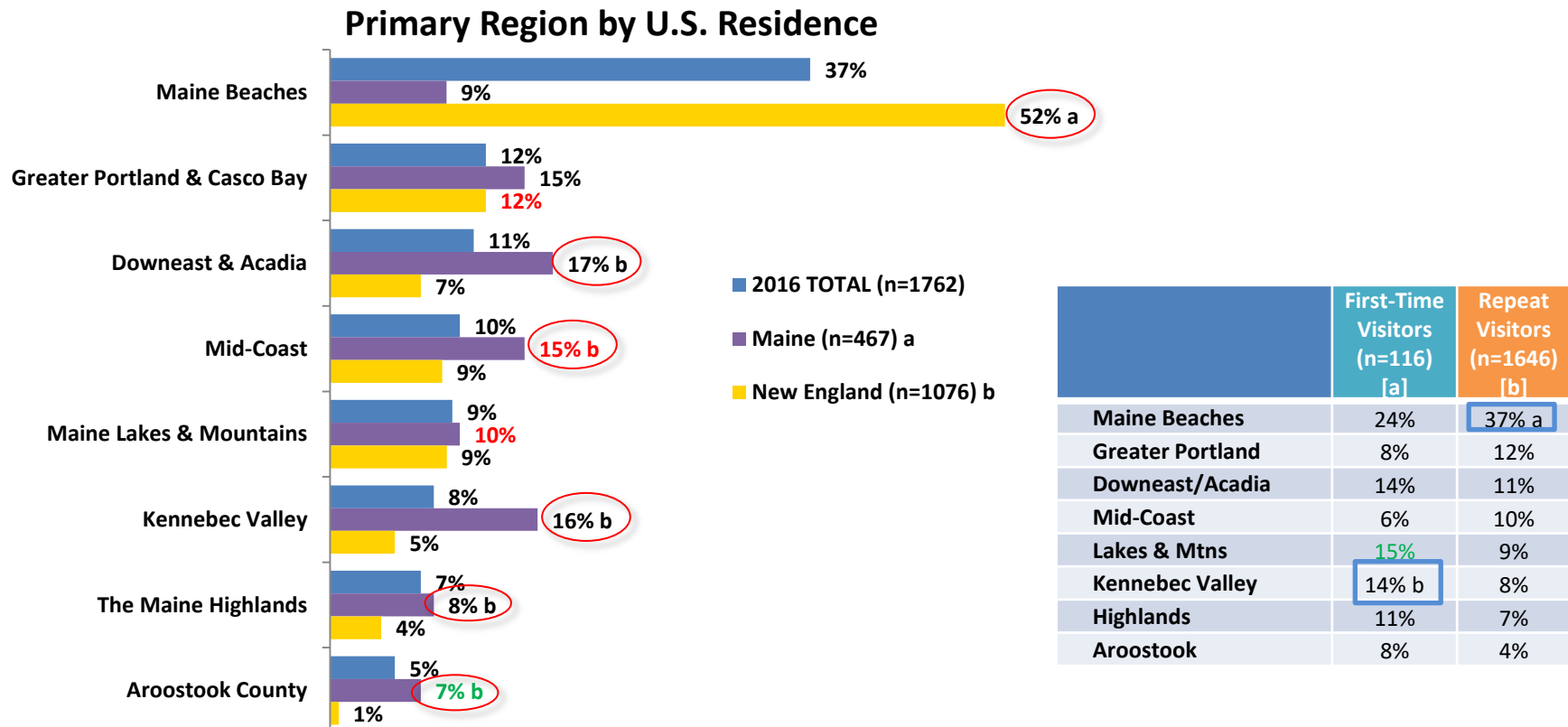
Q21. What region in Maine was your primary destination?

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

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

U.S. visitor origin influences the primary region visited, as does first-time/repeat visitor status.

- When compared to residents of Maine, residents of other New England states are more likely to visit the *Maine Beaches* region. In-state visitors are more likely to visit most of the remaining regions within Maine.
- First-time day visitors are more apt than repeat visitors to be seen in the *Kennebec Valley* region, while repeat visitors are more likely to visit the *Maine Beaches* region.

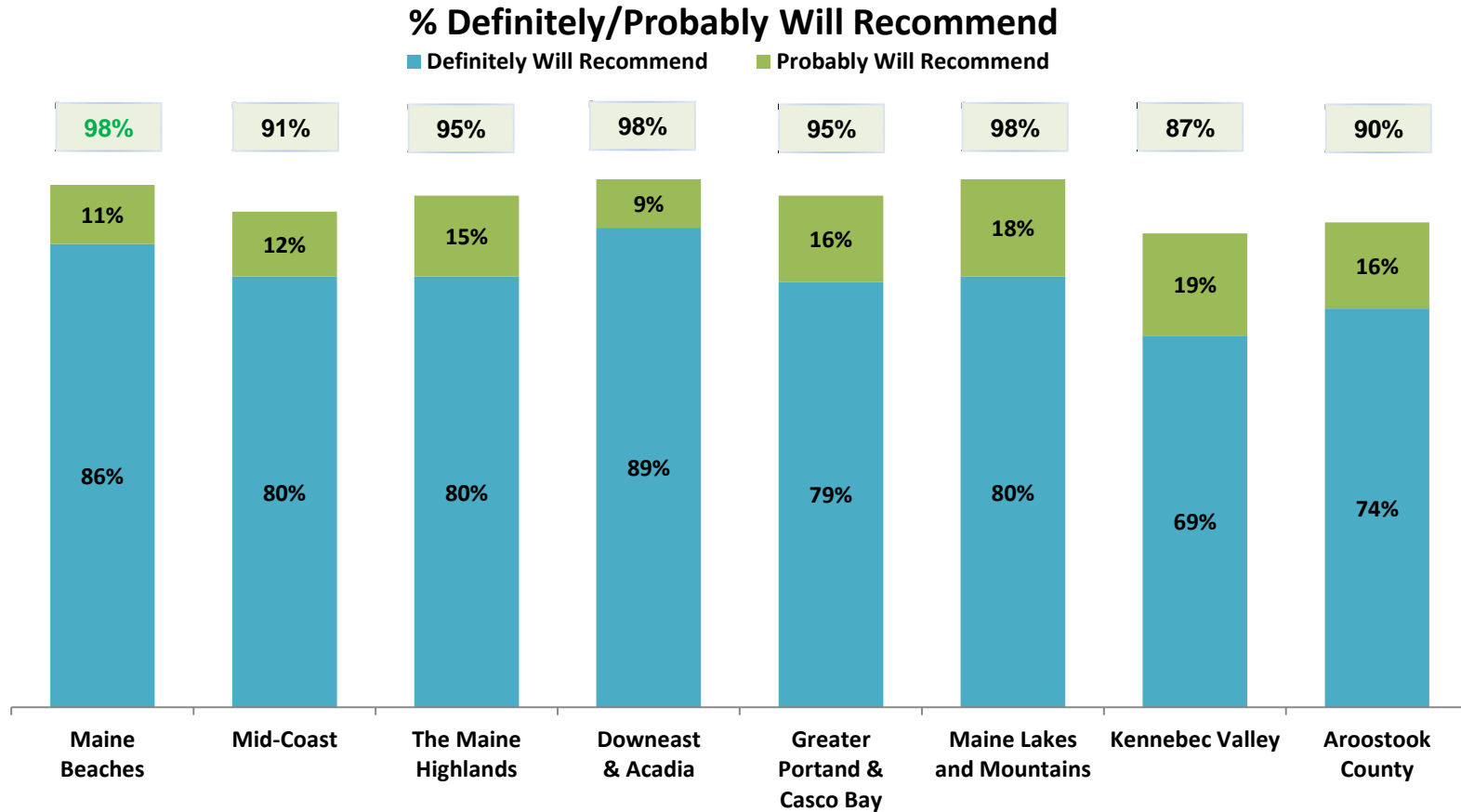


Q21. What region in Maine was your primary destination?

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

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

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



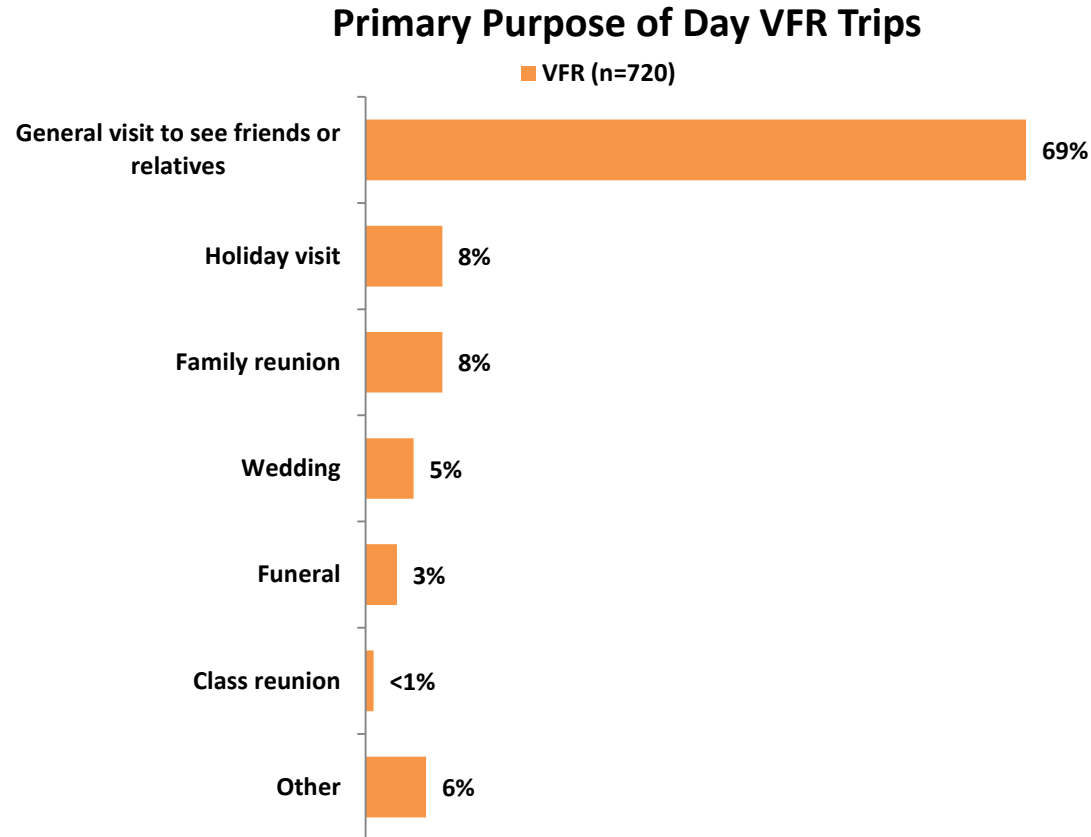
Q22. How likely will you be to recommend the [primary region visited] region to friends or relatives?

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

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

Day Visitor Interest Areas and Activities

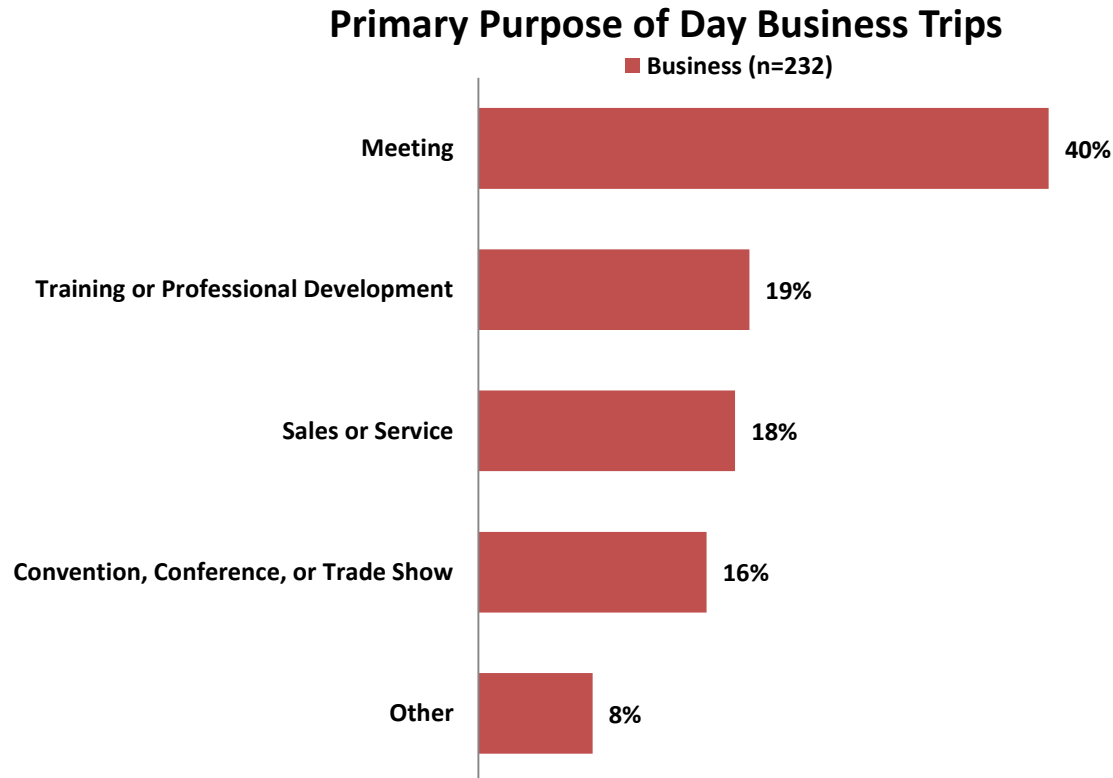
The vast majority of VFR day visitors are on a general visit to see friends or relatives.



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

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

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



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

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

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

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

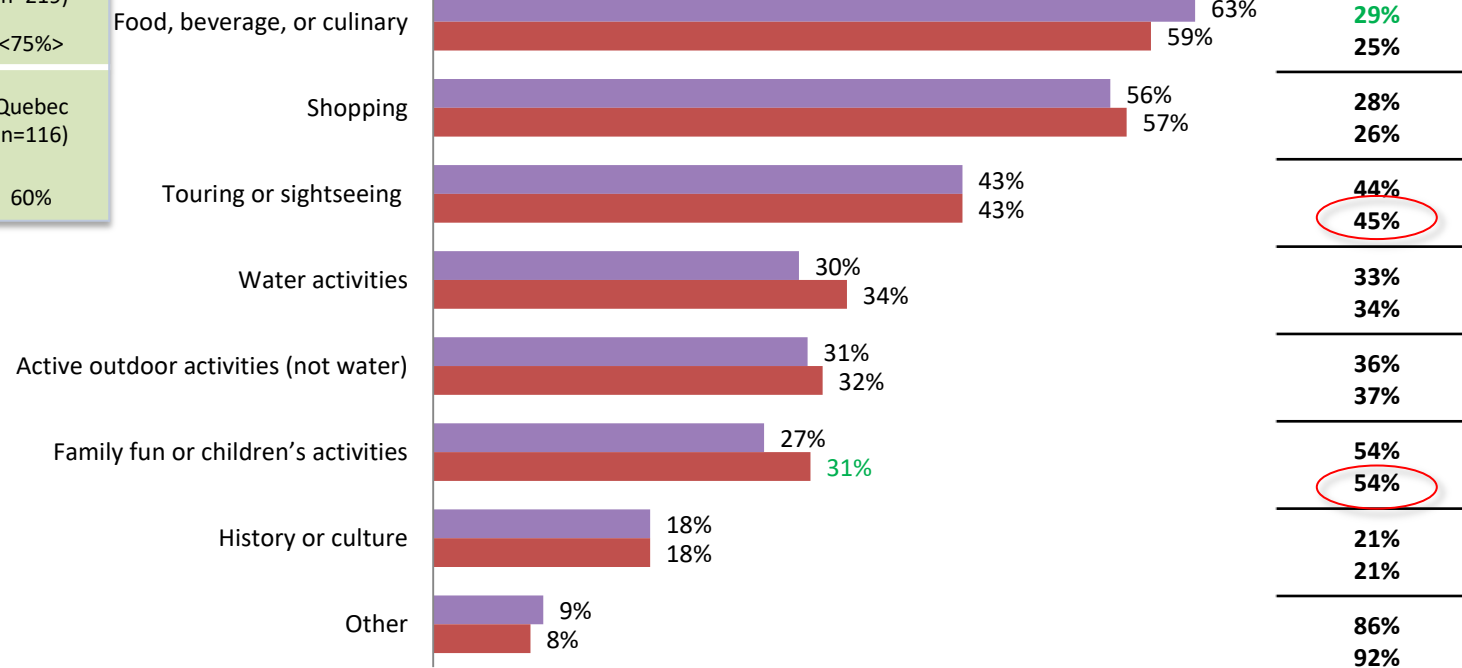
- Among those who select them as interest areas, about half say *family fun/children's activities* (54%) or *touring/sightseeing* (45%) are most important.

Shopping Interest 2016

U.S. Visitor (n=1543)	Canadian Visitor (n=219)
54%	<75%>
Maritime Provinces (n=103)	Quebec (n=116)
<93%>	60%

Interest Areas

■ 2015 (n=1755) ■ 2016 (n=1762)



Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

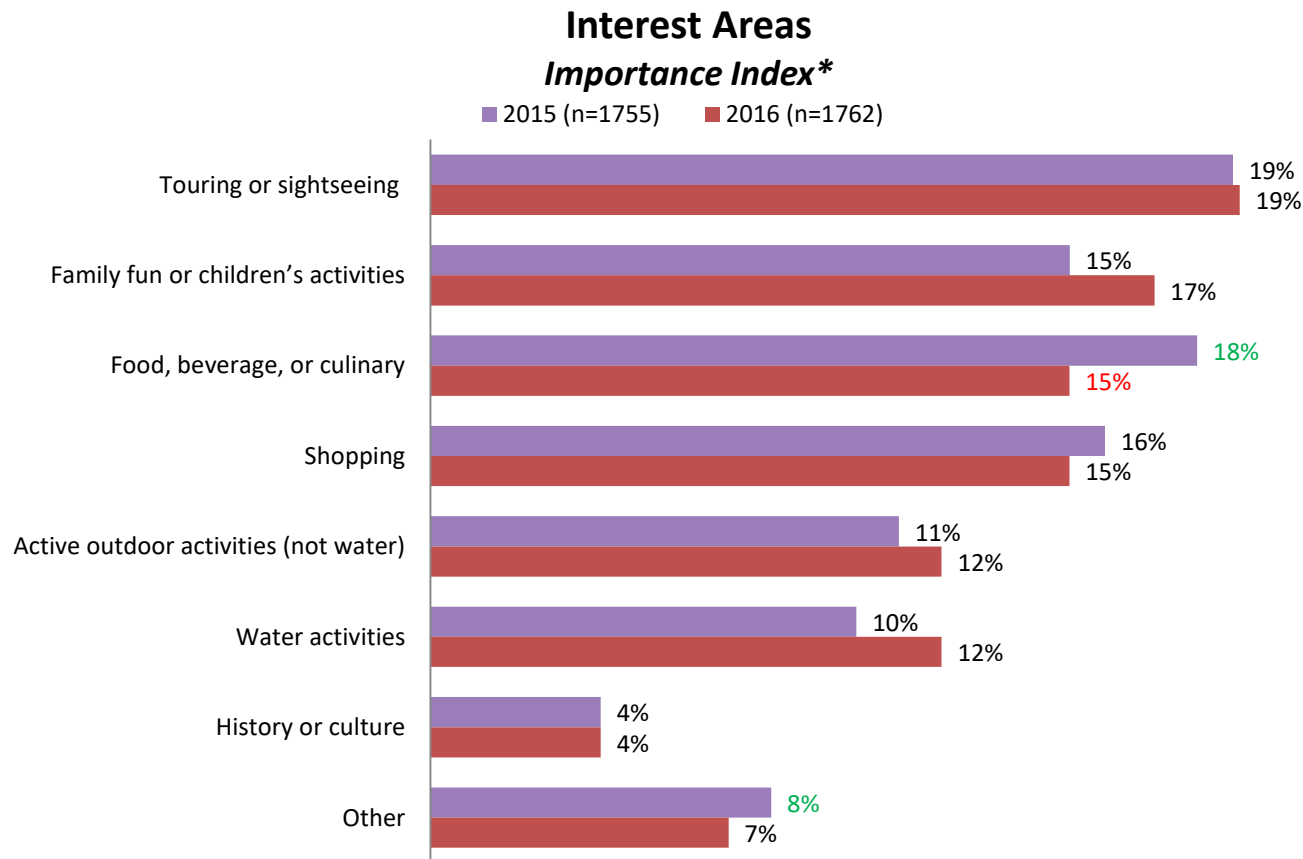
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 87

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

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

Touring/sightseeing and family fun/children's activities rank highest when interest and importance are analyzed in combination.

- After increasing between 2014 and 2015, the importance index for the *food/beverage/culinary* interest area dropped in 2016.



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

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 88

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

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

Day visitors' interest areas differ with age and residence.

- Canadian day visitors are more likely than domestic visitors to list *shopping* as an interest area, while domestic visitors are more likely to list *water, active outdoor, and family fun/children's activities*.
- Younger visitors (< 45 yrs) are more likely to list more active interest areas (*water, active outdoor, family fun*) as well as *food/beverage/culinary* and *history/culture*.

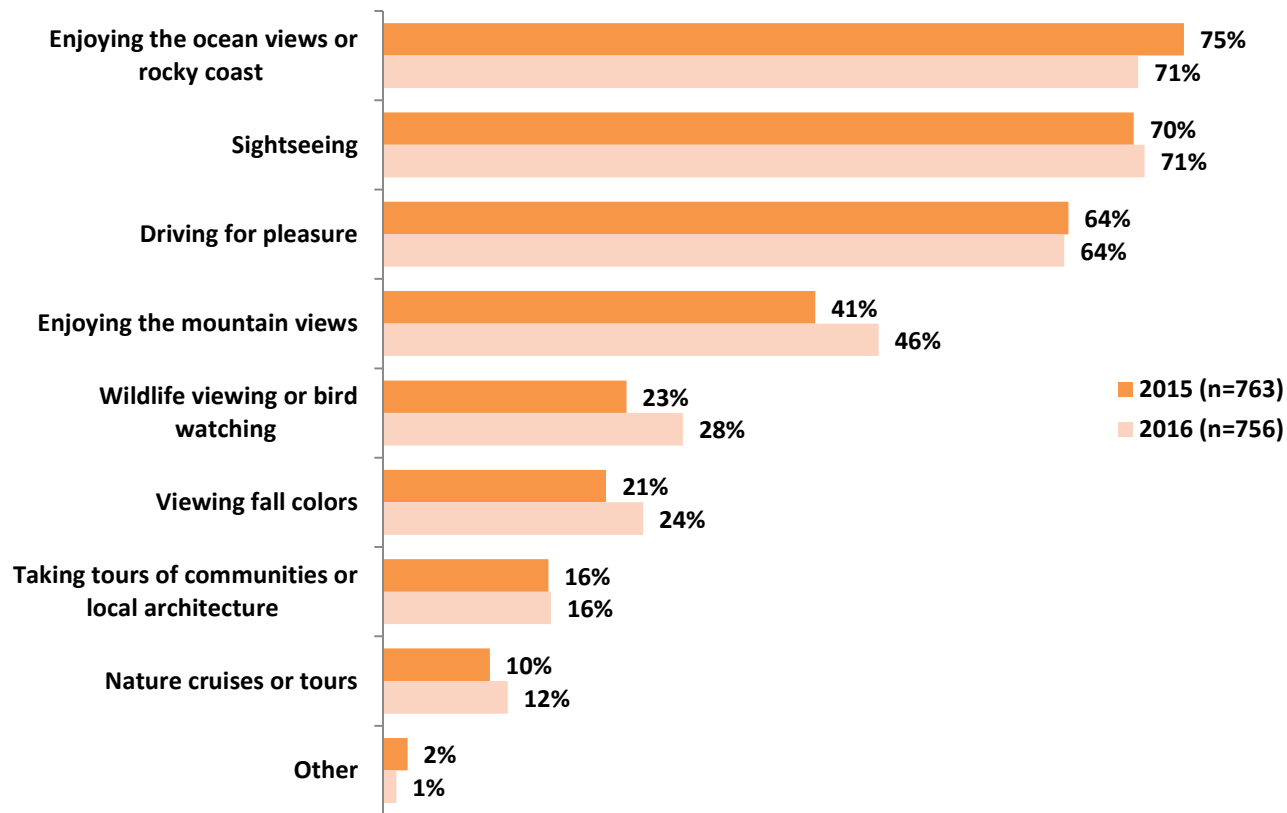
Interest Area	2016 TOTAL (n=1762)	Residence		Age	
		United States (n=1543) a	Canada (n=219) b	<45 yrs (n=809) c	45+ yrs (n=953) d
Food, beverage, or culinary	59%	60%	52%	63% d	56%
Shopping	57%	54%	75% a	58%	56%
Touring or sightseeing	43%	44%	38%	44%	42%
Water activities	34%	35% b	26%	38% d	30%
Active outdoor activities (not water)	32%	34% b	19%	44% d	22%
Family fun or children's activities	31%	33% b	20%	38% d	25%
History or culture	18%	18%	18%	20% d	15%
Other	8%	9% b	4%	5%	11% c

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

- *Driving for pleasure* is also a popular touring/sightseeing activity undertaken by day visitors.

Touring or Sightseeing Activities

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

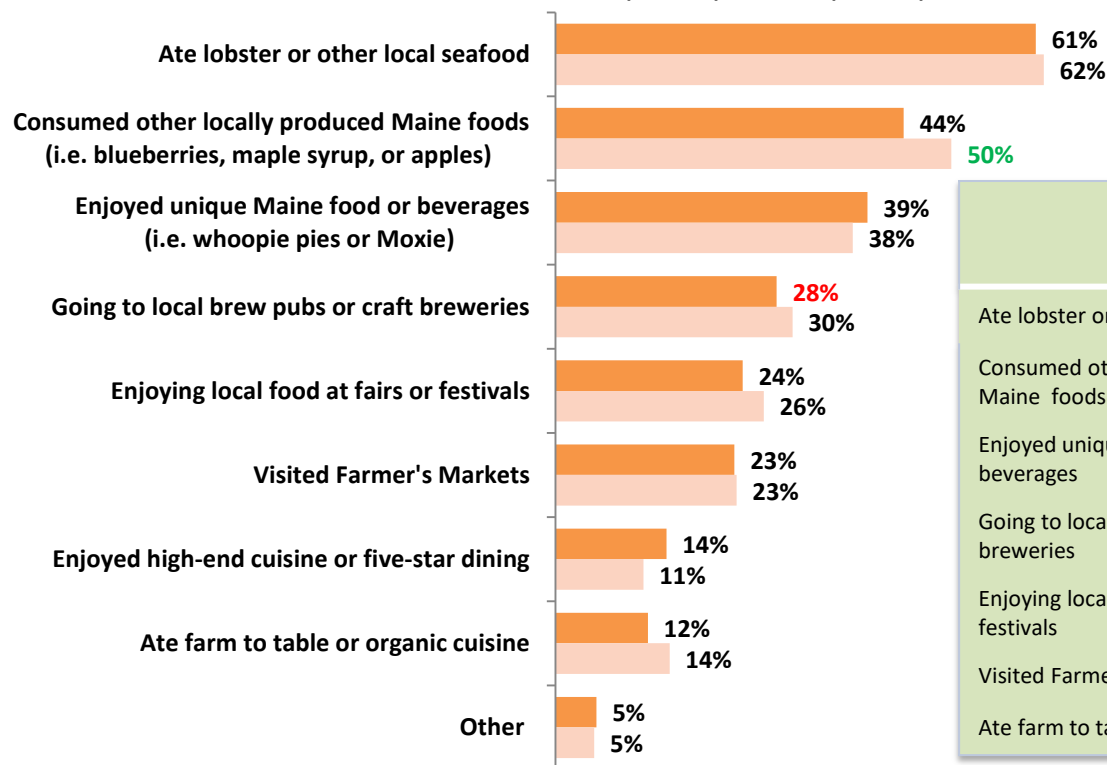
Eating lobster or local seafood is the most popular activity for day visitors interested in food/beverage/culinary activities.

- Those traveling with children are more likely to *enjoy unique Maine food or beverages, enjoy local food at fairs or festivals, and visit Farmer's Markets*.
- Business travelers are more likely than leisure or VFR travelers to visit *local brew pubs or craft breweries* while in Maine (42% versus 28%).

Food, Beverage, or Culinary Activities

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

2015 (n=1099) 2016 (n=1039)



	Kids (n=309) a	No Kids (n=730) b
Ate lobster or other local seafood	63%	61%
Consumed other locally produced Maine foods	56%	48%
Enjoyed unique Maine food or beverages	45%b	34%
Going to local brew pubs or craft breweries	28%	31%
Enjoying local food at fairs or festivals	38%b	21%
Visited Farmer's Markets	31%b	20%
Ate farm to table or organic cuisine	15%	14%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

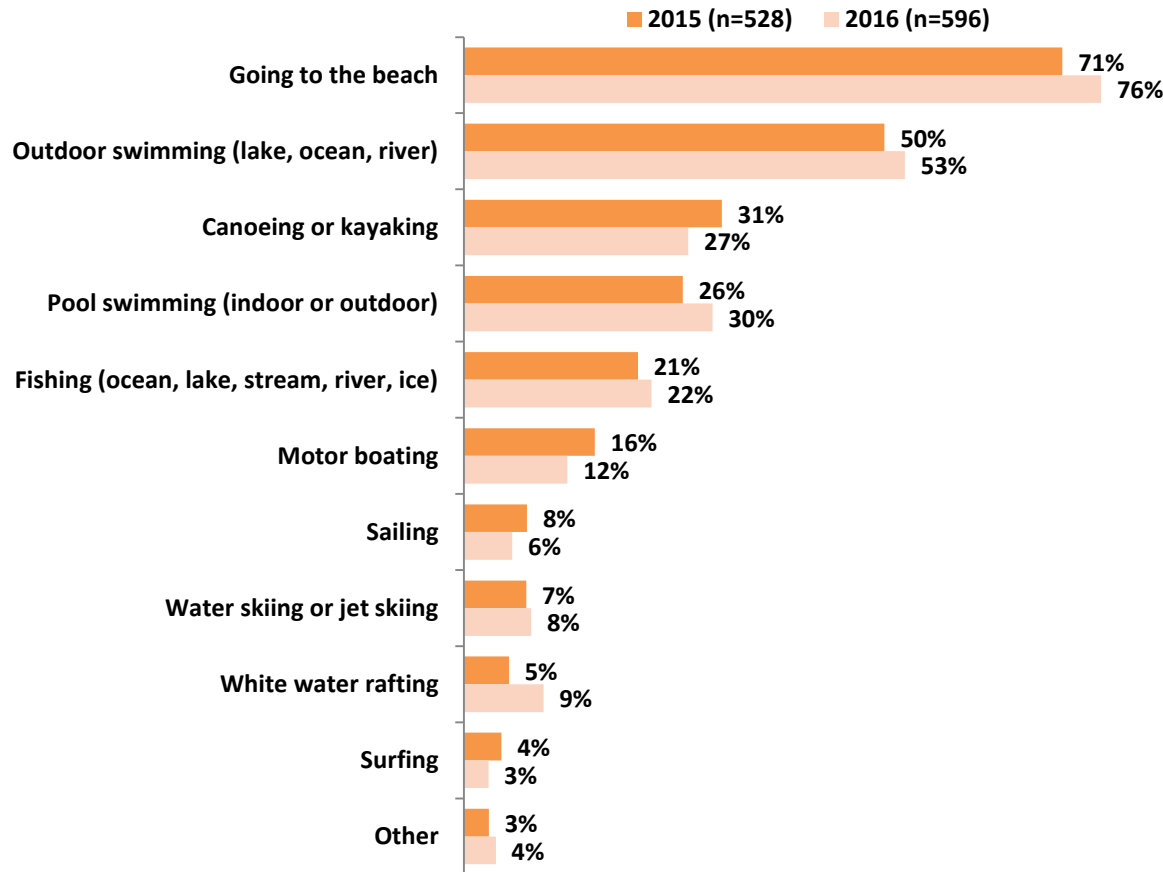
Among day visitors interested in water activities, *going to the beach* is the most popular activity.

2016 Annual Report

- Going to the beach is more popular among repeat visitors than among first-time visitors, and more popular among American visitors than Canadian visitors. In addition, non-resident domestic day visitors are more likely to go to the beach than are Maine residents.

Water Activities

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



Going to the Beach	
U.S. Visitor (n=539)	Canadian Visitor (n=56)
<80%>	41%
Maine (n=111)	Other New England (n=428)
69%	<82%>
First-Time Visitor (n=43)	Repeat Visitor (n=553)
52%	<78%>

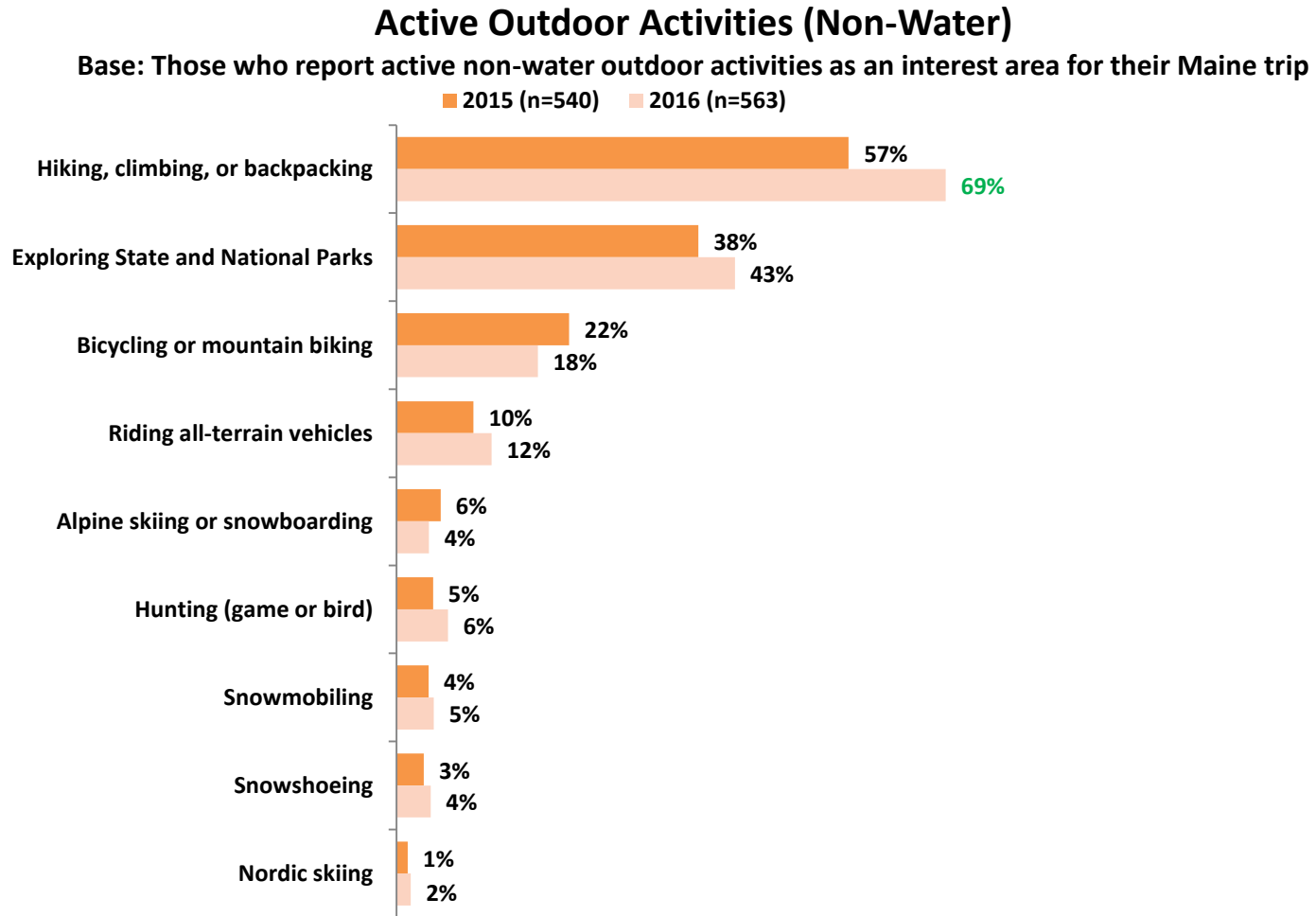
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

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

- *Hiking/climbing/backpacking* was even more popular in 2016 as compared to 2015 (69% versus 57%).



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

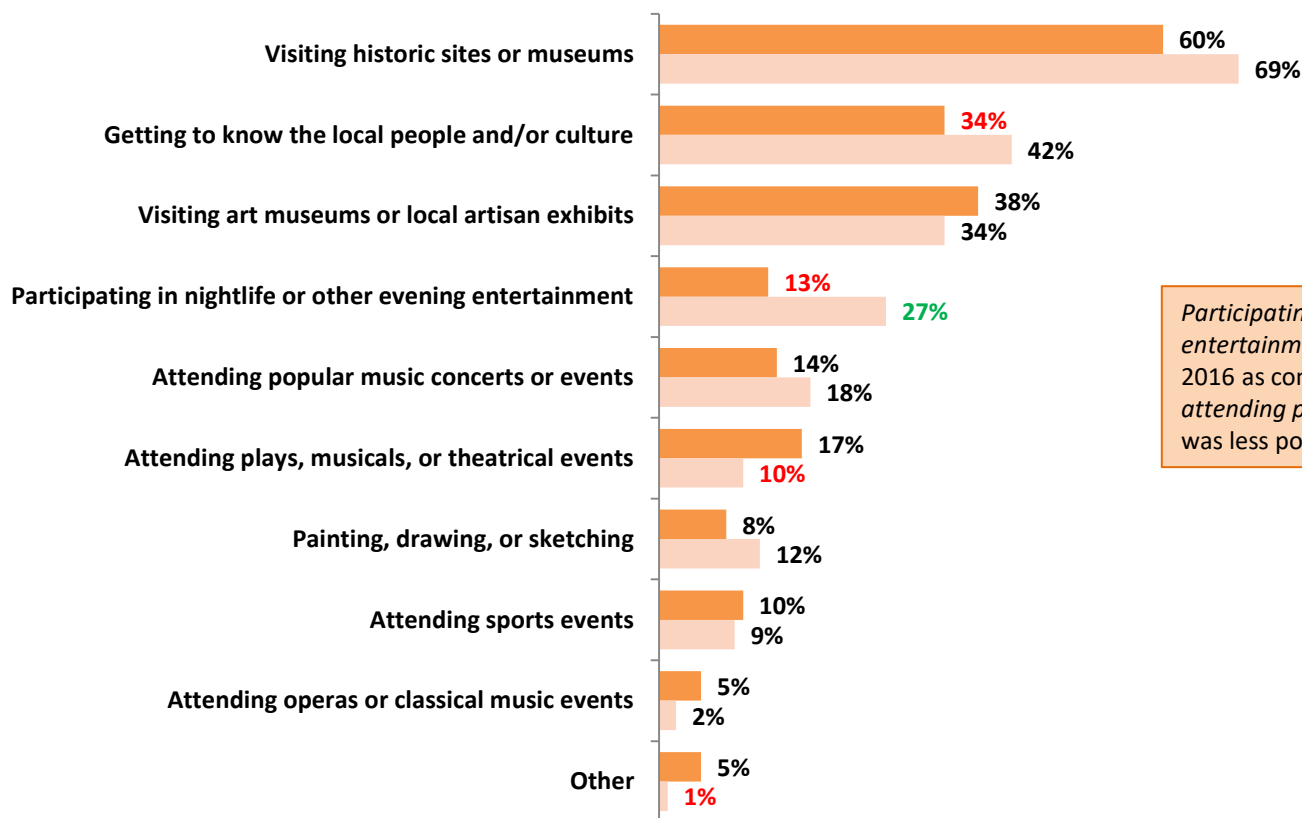
Visiting historic sites or museums is the most popular pursuit among day visitors interested in history/culture.

- Getting to know the local people and/or culture and visiting art museums or local artisan exhibits are also popular activities.

History or Culture Activities

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

2015 (n=313) 2016 (n=310)



Participating in nightlife/evening entertainment was much more popular in 2016 as compared to 2015, while attending plays/musicals/theatrical events was less popular.

Q20. In which of the following activities did you participate during this trip? Please check all that apply.

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

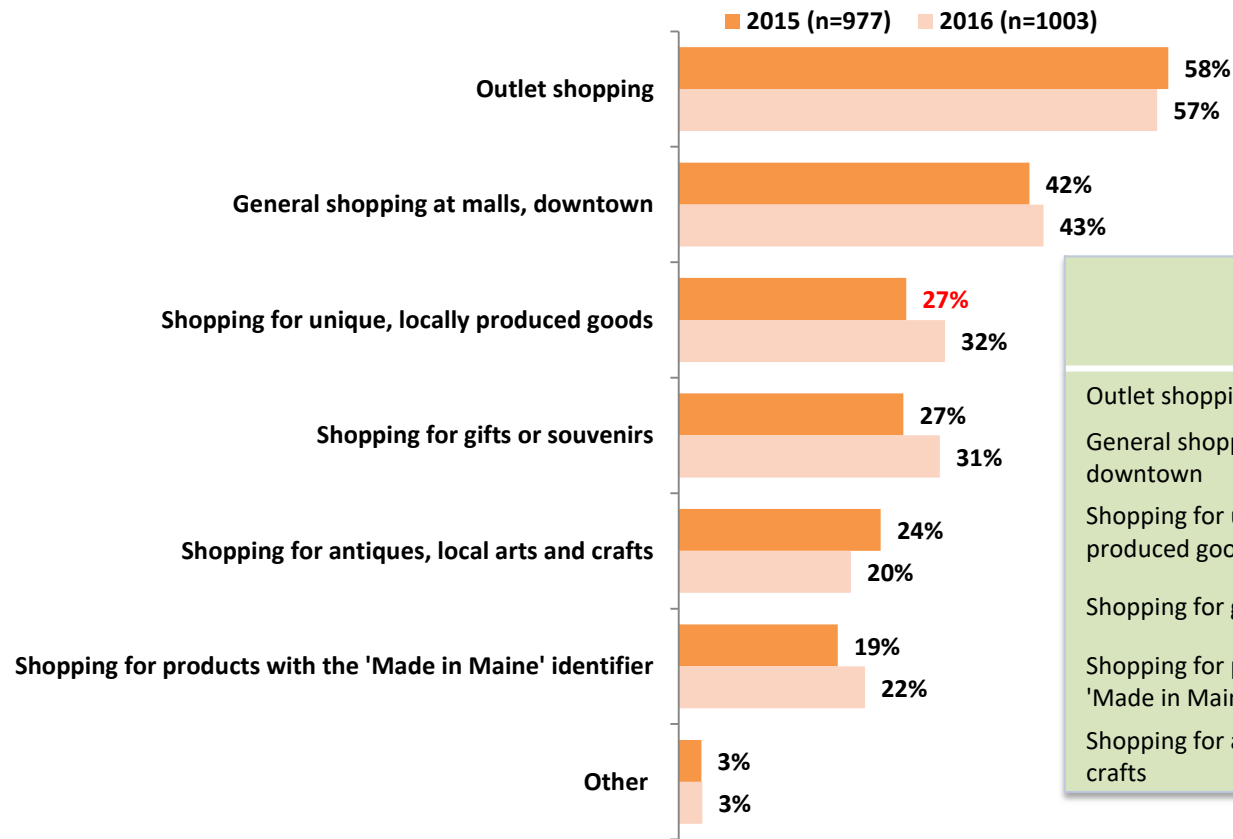
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- While Canadian day visitors are much more likely to do some *general mall/downtown shopping*, domestic day visitors are more likely to shop from various local merchants. Canadian and domestic day visitors are equally likely to shop at the outlets.

Shopping Activities

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



	U.S. (n=838) a	Canada (n=165) b
Outlet shopping	58%	54%
General shopping at malls, downtown	38%	69%a
Shopping for unique, locally produced goods	35%b	15%
Shopping for gifts or souvenirs	33%b	21%
Shopping for products with the 'Made in Maine' identifier	24%b	11%
Shopping for antiques, local arts and crafts	23%b	9%

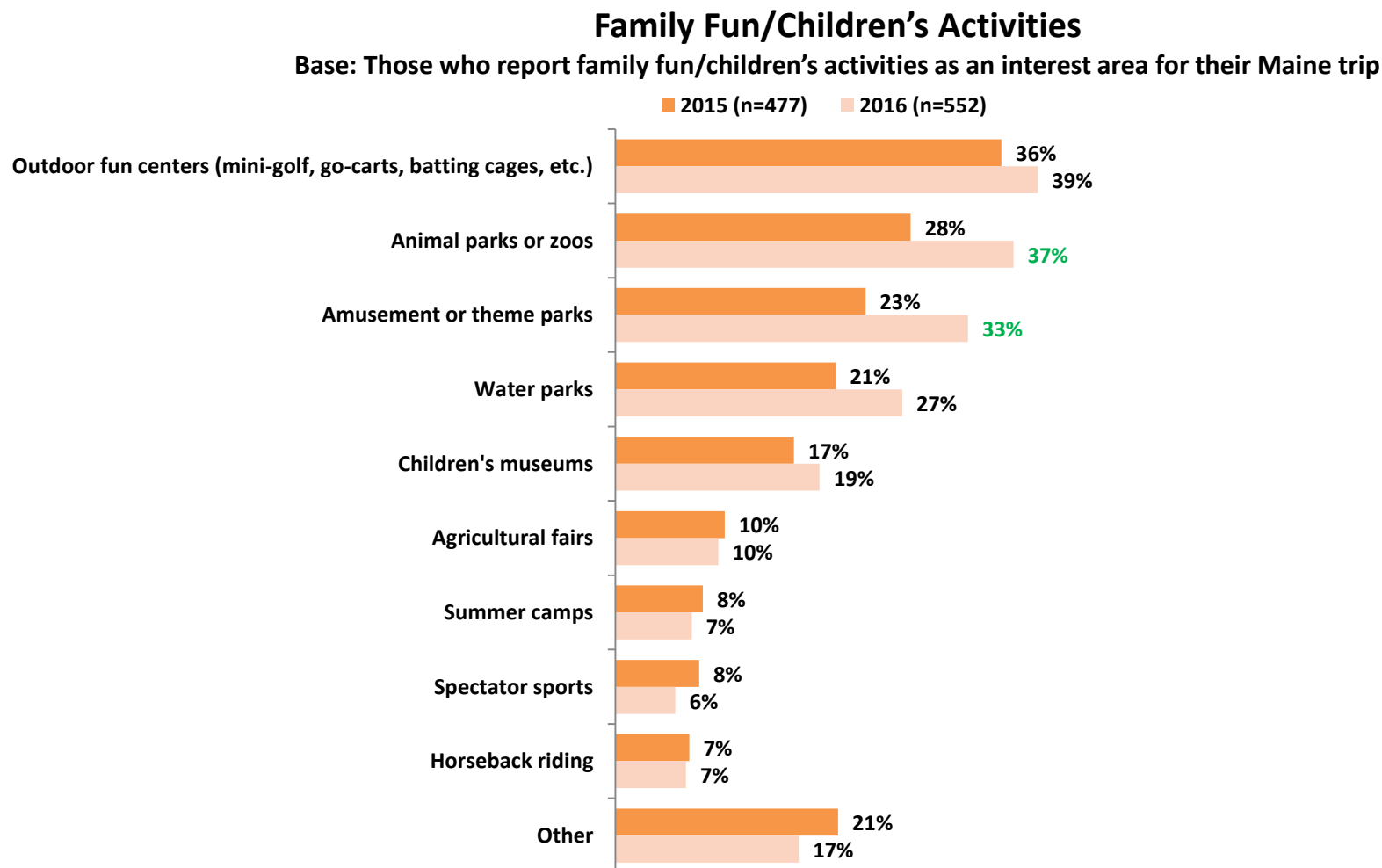
Q20. In which of the following activities did you participate during this trip? Please check all that apply.

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Among day visitors interested in family fun/children's activities, one-third or more enjoyed time at *outdoor fun centers or animal parks/zoos*.

- *Animal parks/zoos and amusement/theme parks* were both more popular among day visitors in 2016 than they had been in 2015.



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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Day Visitor Evaluations

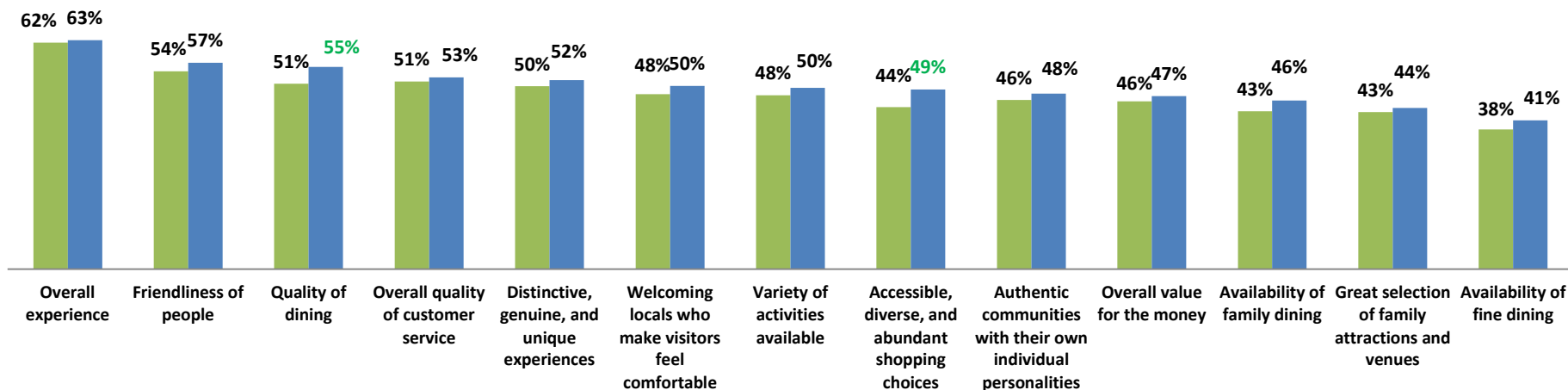
Day visitors were most likely to report that the *overall experience* and the *friendliness of the people* surpassed their expectations while visiting Maine.

- As compared to 2015, a higher proportion of day visitors in 2016 indicate that their Maine visit exceeded their expectations for *quality of dining* and *accessible, diverse, and abundant shopping choices*.
- First-time visitors are more likely than repeat visitors to report that Maine surpassed their expectations for *friendly people*, *shopping choices*, and *availability of fine dining*.

	First-Time Visitors (n=116) a	Repeat Visitors (n=1646) b
Friendliness of the people	68% b	56%
Accessible, diverse, and abundant shopping choices	60% b	48%
Availability of fine dining	57% b	40%

Maine Far Exceeded/Somewhat Above My Expectations

■ Top 2 Box 2015 (n=1755) ■ Top 2 Box 2016 (n=1762)



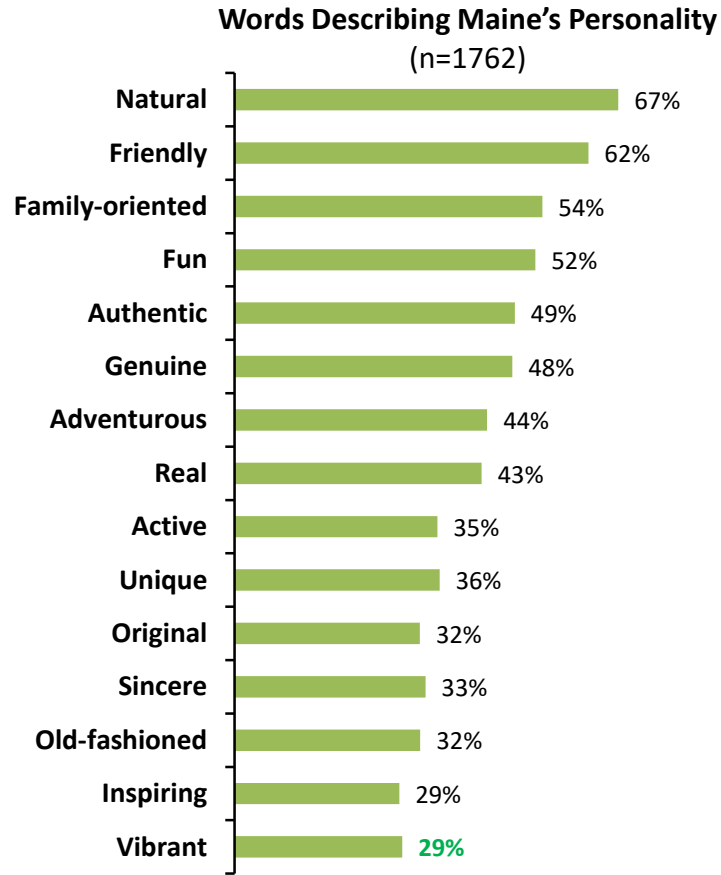
Q28. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

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

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

- 2016 day visitors were more likely than 2015 day visitors to use *vibrant* and *imaginative* to describe Maine’s personality.



Less Frequently Mentioned	
Creative	24%
Open-minded	20%
Enthusiastic	18%
Quirky	16%
Passionate	18%
Imaginative	17%
Dynamic	14%
Offbeat	10%
Unexpected	7%
Unconventional	5%
Reserved	6%
Unusual	6%
Boring	1%
Stodgy	1%
Uninspiring	1%

Q35. If Maine were a person, which of the following words would you choose to describe its personality? Please check all that apply.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Key Visitor Metrics

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

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

Average Trip Spending per Travel Party – Overnight Visitors*

2016 Overnight Travel Spending	2015 Total (n=2779)	2016 Total (n=2909)	2016 Leisure (n=1216) (a)	2016 VFR (n=1168) (b)	2016 Business (n=524) (c)
Total Net Spending	\$973	\$939	\$1,024 b	\$772	\$1,114 b
Lodging	\$521	\$500	\$494	\$449	\$586 ab
Percentage Spending	81%	82%	93%	63%	96%
Food	\$237	\$242	\$252 b	\$225	\$257 b
Percentage Spending	95%	93%	95% c	93%	89%
Retail Goods	\$203	\$196	\$210 b	\$169	\$216 b
Percentage Spending	69%	68%	72% bc	66%	65%
Transportation	\$139	\$132	\$128	\$125	\$162 ab
Percentage Spending	93%	90%	93% c	93% c	78%
Recreation	\$126	\$125	\$126	\$115	\$144 b
Percentage Spending	51%	51%	54% b	48%	49%

*Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category. This differs from previous years, where the average amount spent was based on all travelers, including those who did not spend money in the category. Expenditure data presented here will not match reports generated in prior years.

Q35. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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Day visitor spending averaged just under \$300 per travel party, with the highest proportions spent on *retail goods* and *food*.

- Business day travelers spent more money than travelers visiting for leisure or to visit friends/relatives.

Average Trip Spending per Travel Party – Day Visitors*

2016 Day Travel Spending	2015 Total (n=1755)	2016 Total (n=1762)	2016 Leisure (n=232) (a)	2016 VFR (n=809) (b)	2016 Business (n=720) (c)
Total Net Spending	\$287	\$294	\$275	\$293	\$364 ab
Retail Goods	\$126	\$128	\$112	\$138 a	\$160 a
Percentage Spending	65%	66%	71%	60% a	65%
Food	\$118	\$124	\$116	\$124	\$156 ab
Percentage Spending	95%	95%	97%	93% a	96%
Recreation	\$75	\$74	\$70	\$73	\$87
Percentage Spending	46%	49%	46%	50%	55%
Transportation	\$70	\$67	\$62	\$65	\$94 ab
Percentage Spending	95%	96%	94% b	97%	97%

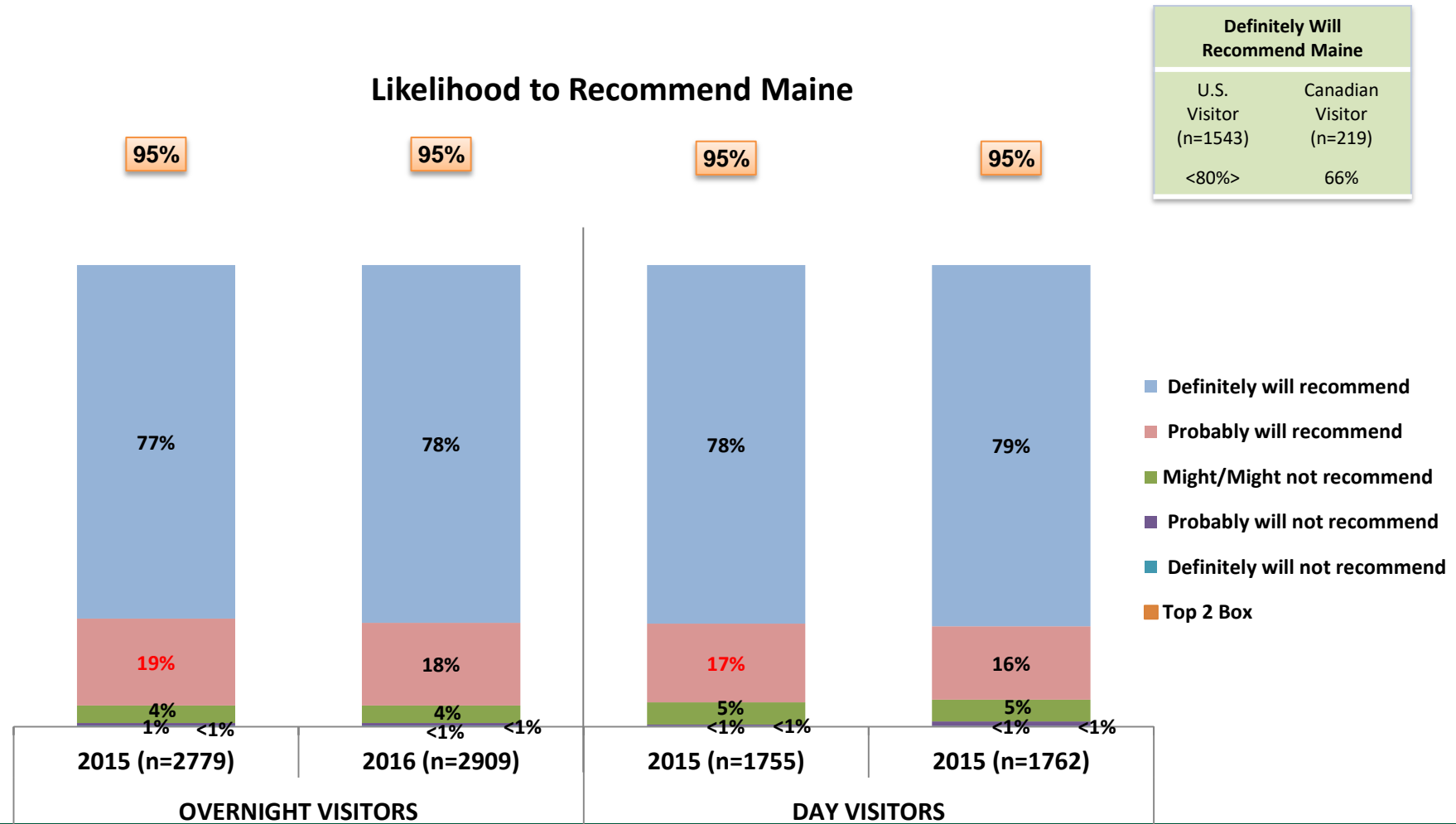
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Q35. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below. <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

- Domestic day visitors are more likely than Canadian day visitors to indicate that they *definitely will recommend* Maine as a vacation destination (80% versus 66%).



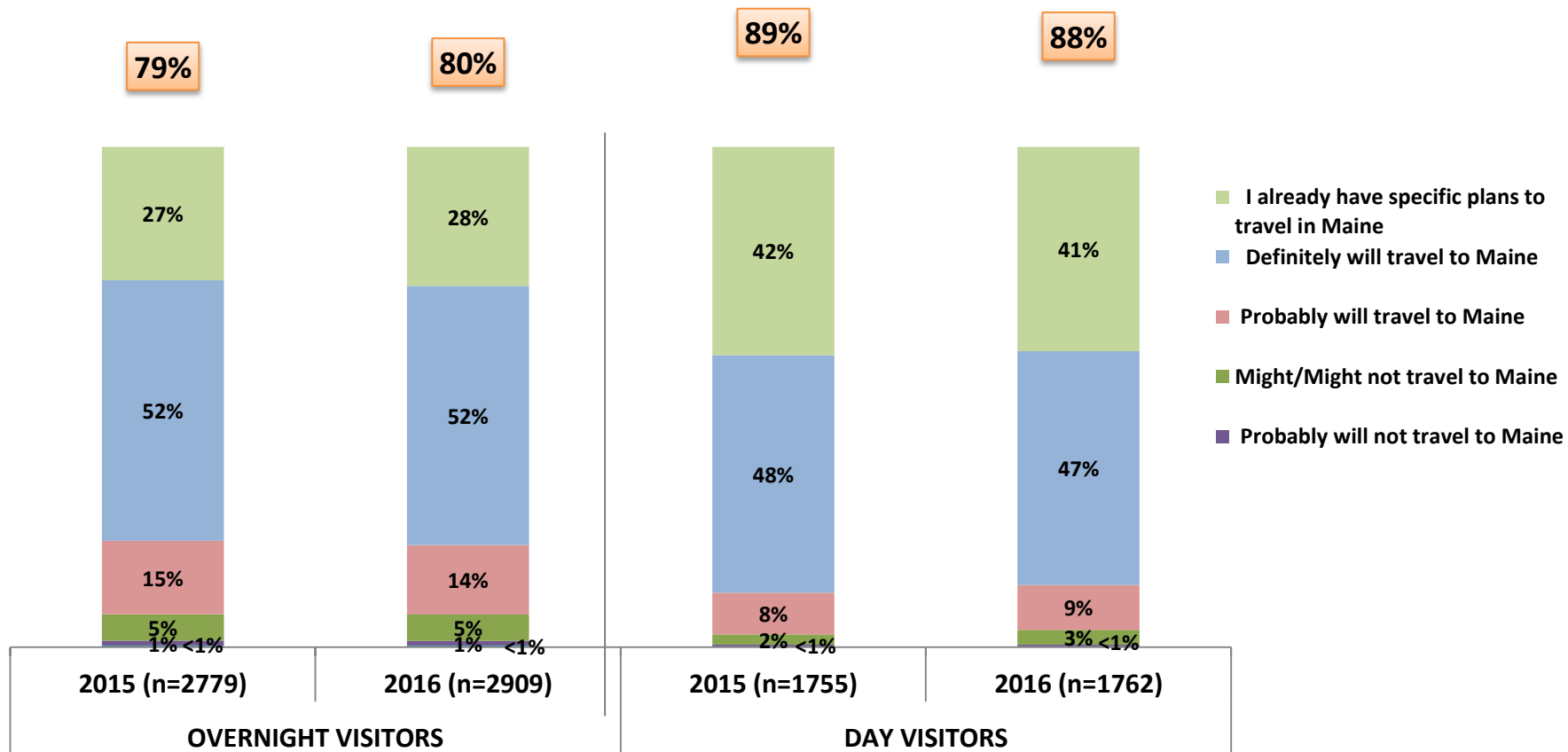
Overnight Q42, Day Q33. How likely will you be to recommend Maine as a vacation destination to friends or relatives?

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

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

Future intent to visit Maine also remains high.

Likelihood to Travel to Maine in Future



Overnight Q41, Day Q31. How likely will you be to travel in Maine in the next two years?

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

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

American overnight visitors, those traveling with children, travelers staying in unpaid accommodations, repeat visitors, and winter travelers are all more likely to express an intent to visit Maine again in the next two years.

Overnight Visitors <i>Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit</i>	
U.S. Resident (n=2512)	Canadian Resident (n=397)
<82%>	67%
Paid Accommodations (n=1909)	Unpaid Accommodations (n=1000)
76%	<88%>
Kids on Trip (n=955)	No Kids (n=1954)
<85%>	78%
First-Time Visitors (n=659)	Repeat Visitors (n=2250)
65%	<84%>

Overnight Visitors <i>Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit</i>		
Business (n=524) a	Leisure (n=1216) b	VFR (n=1168) c
80% b	73%	87% ab
Winter (n=478) a	Summer (n=1423) b	Fall (n=1007) c
87% bc	78%	79%

Overnight Q41, Day Q31. How likely will you be to travel in Maine in the next two years?

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

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

Repeat day visitors, Canadian day visitors from the Maritime provinces, and in-state day visitors are all more likely to express intent to visit Maine again in the next two years.

<u>Day Visitors</u> <i>Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit</i>	
Maritime Provinces (n=103)	Quebec (n=116)
<91%>	74%
Maine Resident (n=467)	New England Resident (n=1076)
<95%>	86%
First-Time Visitor (n=116)	Repeat Visitor (n=1646)
73%	<89%>

Overnight Q41, Day Q31. How likely will you be to travel in Maine in the next two years?

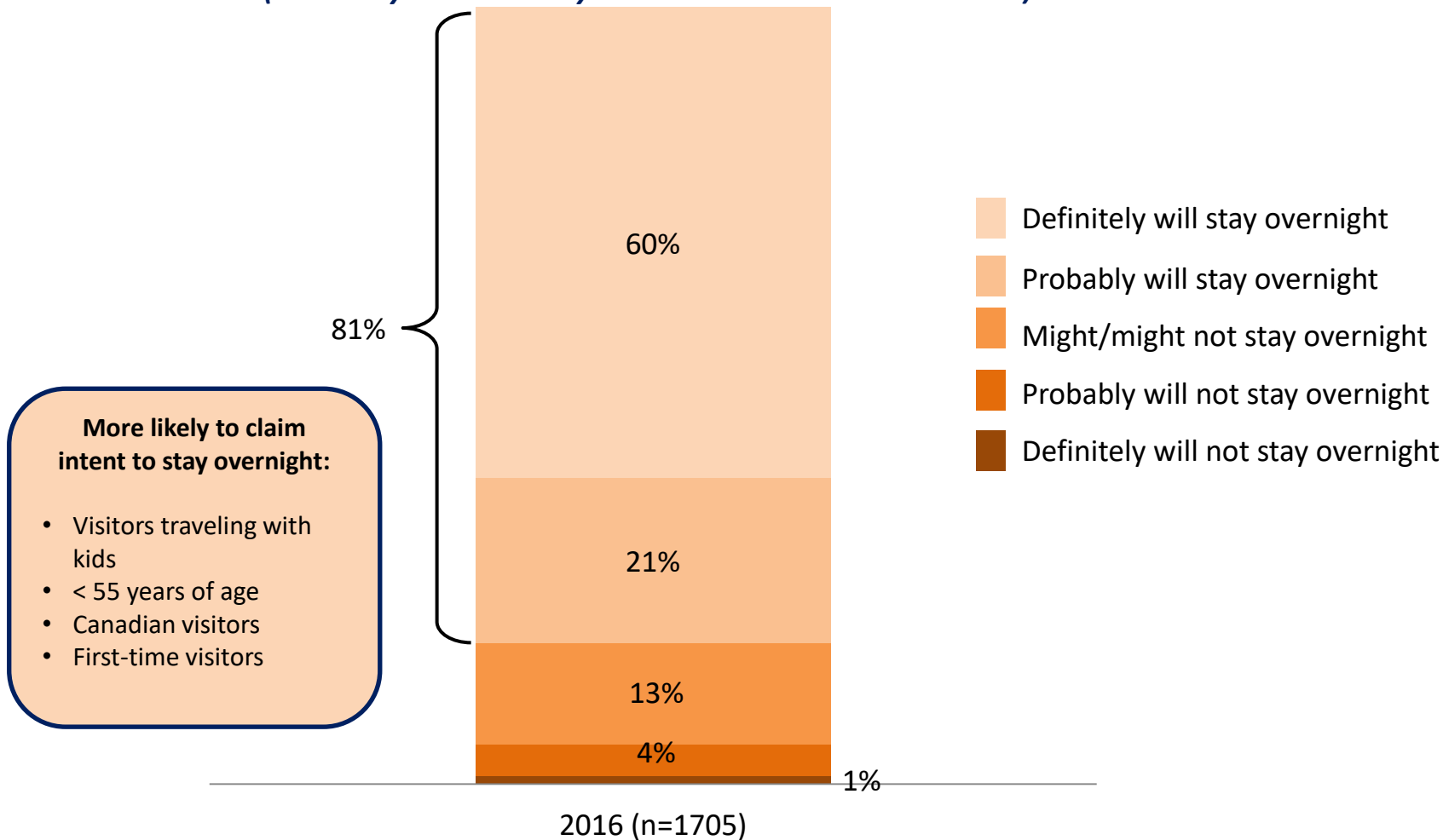
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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Among day visitors who are likely to visit Maine again in the next two years, four in five say they *definitely or probably will stay overnight* when they visit.

Likelihood of Staying Overnight in Maine in Next Two Years

(Base=Day Visitors Likely to Visit Maine in Next Two Years)



Day Q32. Assuming you travel in Maine again in the next two years, how likely are you to stay overnight in Maine on one or more of these trips?

Demographic Profile

Visitor Demographics

	Overnight Visitors		Day Visitors	
	2015 (n=2779)	2016 (n=2909)	2015 (n=1755)	2016 (n=1762)
Age:				
< 35	30%	34%	25%	28%
35 – 44	19%	22%	16%	18%
45 – 54	19%	18%	21%	19%
55 +	31%	26%	38%	35%
Mean Age (Years)	45.4	42.8	48.0	46.0
Income:				
< \$50,000	17%	20%	22%	26%
\$50,000 - \$99,000	41%	42%	43%	42%
\$100,000 +	42%	39%	35%	32%
Estimated Mean Income	\$103,770	\$98,650	\$93,020	\$88,130
Female	58%	60%	62%	75%
College Degree or Higher	73%	66%	68%	63%
Married	64%	56%	60%	56%
Employed Full Time	63%	66%	55%	52%

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

Visitor Segments

- Overnight visitors to Maine in 2016 are most likely to be categorized as *Balanced Achievers*. *Genuine Originals* make up the next largest proportion of overnight visitors to Maine in 2016.
- Day visitors are most likely to fall into these two visitor segments also, with a higher proportion of *Genuine Originals* (35%) than *Balanced Achievers* (27%).

	Overnight Visitors		Day Visitors	
	2015 (n=2779)	2016 (n=2909)	2015 (n=1755)	2016 (n=1762)
Priority Segments:				
Balanced Achievers	36%	42%	25%	27%
Genuine Originals	31%	28%	35%	35%
Social Sophisticates	8%	7%	9%	8%
Non-Priority Segments:				
Obligated Traditionalists	14%	10%	19%	19%
Comfortable Pragmatists	3%	2%	5%	4%

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

Conclusions

Conclusions

Continued Upward Trend in Visitation Estimates

- **The State of Maine posted strong year-over-year growth in tourism-related visitation estimates again in 2016, continuing the upward trend seen for several years now.** Capitalizing on favorable nationwide and state-wide economic influences, Maine succeeded in attracting 4.9% more overnight visitors than it had in 2015 and 3.5% more day visitors. Once again, Maine attracted a sizeable proportion of first-time visitors, successfully introducing new visitors to the State, while also bringing in a steady influx of repeat visitors. In addition, visitation during Maine's Fall season showed a larger year-over-year increase than did the Summer and Winter seasons for the third year in a row, suggesting that efforts to attract visitors to Maine during this shoulder season have been successful.

Conclusions

Need for a Continued Online Presence and Enhanced Social Media Marketing Strategy

- **As expected, the majority of travel research and trip planning now takes place online, with social media playing an increasingly important role in this process.** Nearly two-thirds of Maine overnight visitors used the Internet when planning their recent trip to Maine, continuing the Internet's top spot as a travel planning resource. Social media usage for travel planning continues to grow, with one-fourth of Maine visitors reporting social media as a resource when planning their most recent Maine trip. Since introducing social media as a trip planning resource in the 2008 questionnaire, the proportion using this resource has consistently increased each year, going from 8% to 24% in four years. Clearly, an online marketing presence is critical for any destination, including Maine, along with a strategic social media platform playing a vital marketing role as well.

Conclusions

Opportunity to Provide Real-Time, On-Site Information to Visitors

- **The proportion of visitors researching activities and attractions after arriving in Maine increased once again in 2016, continuing the steady rise seen since 2009.** Being away from home, the majority of these visitors are using a mobile device to conduct this research while traveling. This increasing dependence on real-time, on-site information while traveling presents an opportunity for the Office of Tourism to provide critical, timely information to these travelers. This could be achieved through a Maine travel app designed to provide detailed information to travelers on activities, attractions, restaurants, lodging, etc. An app would deliver a single location from which travelers could access information related to traveling in Maine, supplementing (and perhaps even linking to) the information currently found on www.visitmaine.com. Providing this information for travelers could help spread visitation to less-visited areas of the State, extending travelers' stays in Maine, and introducing new locales and activities to travelers.

Conclusions

Importance of Promoting Maine as a Family-Friendly Destination

- **Families traveling with children continue to make up a large and desirable contingent of Maine visitors.** The last four years have seen an increase in the proportion of Maine visitors traveling with children, with about one-third of travel parties including children. These visitors tend to stay in Maine for longer periods of time, spend more money, and show a higher intent to return to Maine and to recommend the State as a destination. In addition, one of Maine's priority visitor segments, the *Balanced Achievers*, are family-oriented and more likely to have children. Maine must continue to market the State as a family-friendly destination to maintain its attractiveness to these families traveling with children. Further exploration into the motivations, interests, and travel habits of this critical travel cohort is warranted.

Conclusions

Monitoring of In-State Visitation Warranted

- **This year saw a drop in the proportion of in-state visitors vacationing in Maine, both for overnight trips and day trips.** Though not alarming in its magnitude, continued monitoring is necessary to ensure that this drop doesn't signal an emerging trend among Maine residents. Among overnight visitors, this is the second consecutive year experiencing a drop in resident visitation. Though some may argue that resident spending isn't "new" money being brought into the State, the money spent by residents visiting other areas in the State supports the many tourist industries and local businesses that are crucial to the economic vitality of the State. In essence, these local tourists play an important role in keeping money in Maine. Maine must continue to promote the variety of experiences available in this large State. From shopping and beach excursions to white-water rafting and camping in the mountains, travel experiences found in the different regions of the State differ dramatically. Additional marketing should focus on these varied experiences available in Maine, with the goal of reminding residents of the numerous opportunities to explore new environments and experiences without ever leaving their home State.

Conclusions

Decline in Canadian Visitation Appears to Have Stabilized

- **Following two consecutive years of decreases, the proportion of Canadians visiting Maine remained the same in 2016 as in 2015, suggesting that the impact of the low exchange rate on Canadian visitation may have stabilized.** Despite a continued weak Canadian dollar, the decline in Canadian visitation appears to have potentially reached its lowest point over the past few years. Though still unfavorable for Canadians, the exchange rate does not appear to be declining any longer, providing some level of assurance that it may be on its way back up. 2016 showed an increase in the proportion of Canadians visiting Maine for the first time, suggesting the successful introduction of the State to new Canadian visitors. In 2016, Canadian visitors once again spent more money than U.S. visitors (particularly on lodging and retail purchases) and stayed in Maine longer while visiting. Continued marketing to this core market is critical in order to maintain, and eventually increase, levels of Canadian visitation when the exchange rate becomes more favorable for Canadians.



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