Maine Office of Tourism
Visitor Tracking Research
2014 Calendar Year Annual Report

Prepared by

March 2015

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Research Objectives and Methodology

Research Objectives

- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors.

- This research program is designed to:
  - Profile Maine visitors in demographic terms, as well as in their travel patterns and habits;
  - Explore perceptions of Maine among visitors;
  - Learn about visitors' travel planning practices;
  - Describe both seasonal and regional visitation patterns of Maine visitors;
  - Estimate the number of visitors coming to Maine; and
  - Estimate levels of spending in Maine.

Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from two national online panels – Research Now and Instantly (formerly uSamp).

- Information is gathered using three main surveys on an ongoing basis:
  - **Maine Overnight Visitor Survey**
    - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
    - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.

  - **Maine Day Visitor Survey**
    - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who have taken a day trip in Maine that is at least 50 miles from home within the past four weeks.

  - **National Omnibus Survey**
    - Includes a nationally balanced sample of US residents; and
    - Used to determine the incidence of travel nationwide and Maine's share of that travel.

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Methodology

- This report outlines results from calendar year 2014, with travel occurring between December 2013 and November 2014.

- Data was collected between January 1st and December 15th 2014. The number of completed surveys collected for each research component are as follows:
  - Maine Overnight Visitor Survey – 2,930
  - Maine Day Visitor – 1,733
  - National Omnibus Survey – 17,675

- 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.*

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2014 in Context

Stormy winter kicks off 2014; widespread snow and ice storms throughout Northeast, Southeast, and Midwest.

- January and February saw several storms create travel problems. Major highways were closed, flights delayed, airports closed, and various power outages occurred.

- The Southeast United States experienced three major storms in January alone, paralyzing a region not accustomed to winter travel conditions.

Maine temperatures comparable to prior years, with higher than average precipitation during the months of July, October, and December.

- The 2014 temperatures in Maine were pretty much comparable to the 20-year average for the State, with the exception of October which showed higher than average temperatures, and March which showed lower than average temperatures.

- Precipitation in Maine varied from the 20-year average during several months – bringing higher than normal amounts in July, October, and December, and lower than average amounts in September and November.

Precipitation and Temperature – Maine 2014
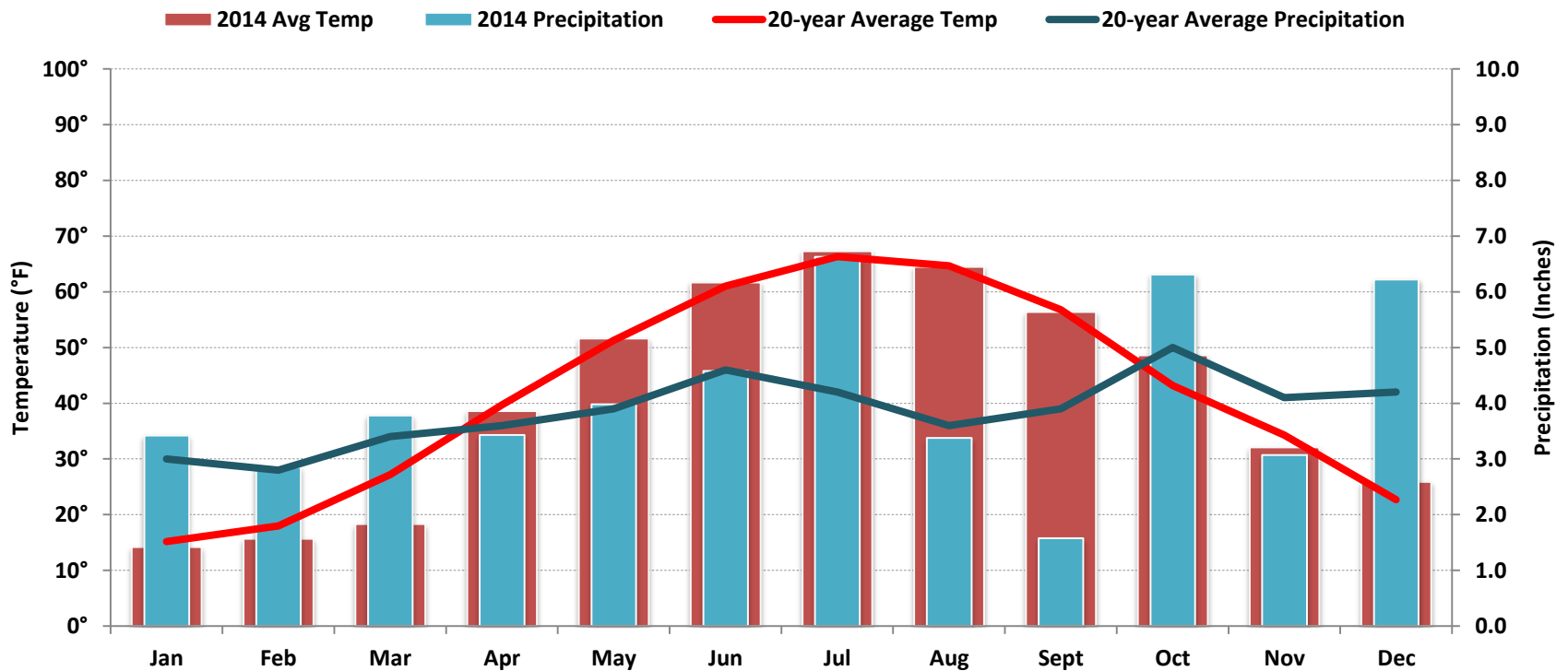
Data source: NOAA.gov

2014 brings promise for employment nationwide as best year for job growth since 1999.

- The unemployment level dropped to 5.6% in December, capping off a year of continual declines in unemployment.

Gas prices maintain high levels through most of 2014, beginning a descent during the Fall season.

- Maine's gasoline prices remained higher than the national average for most of 2014. During the late Spring, however, Maine experienced gas prices just about equal to the national average.

- Maine gas prices peaked in early July and experienced their lowest levels in December, a trend that continued into 2015.

18 Month Average Retail Price Chart

©2015 GasBuddy.com
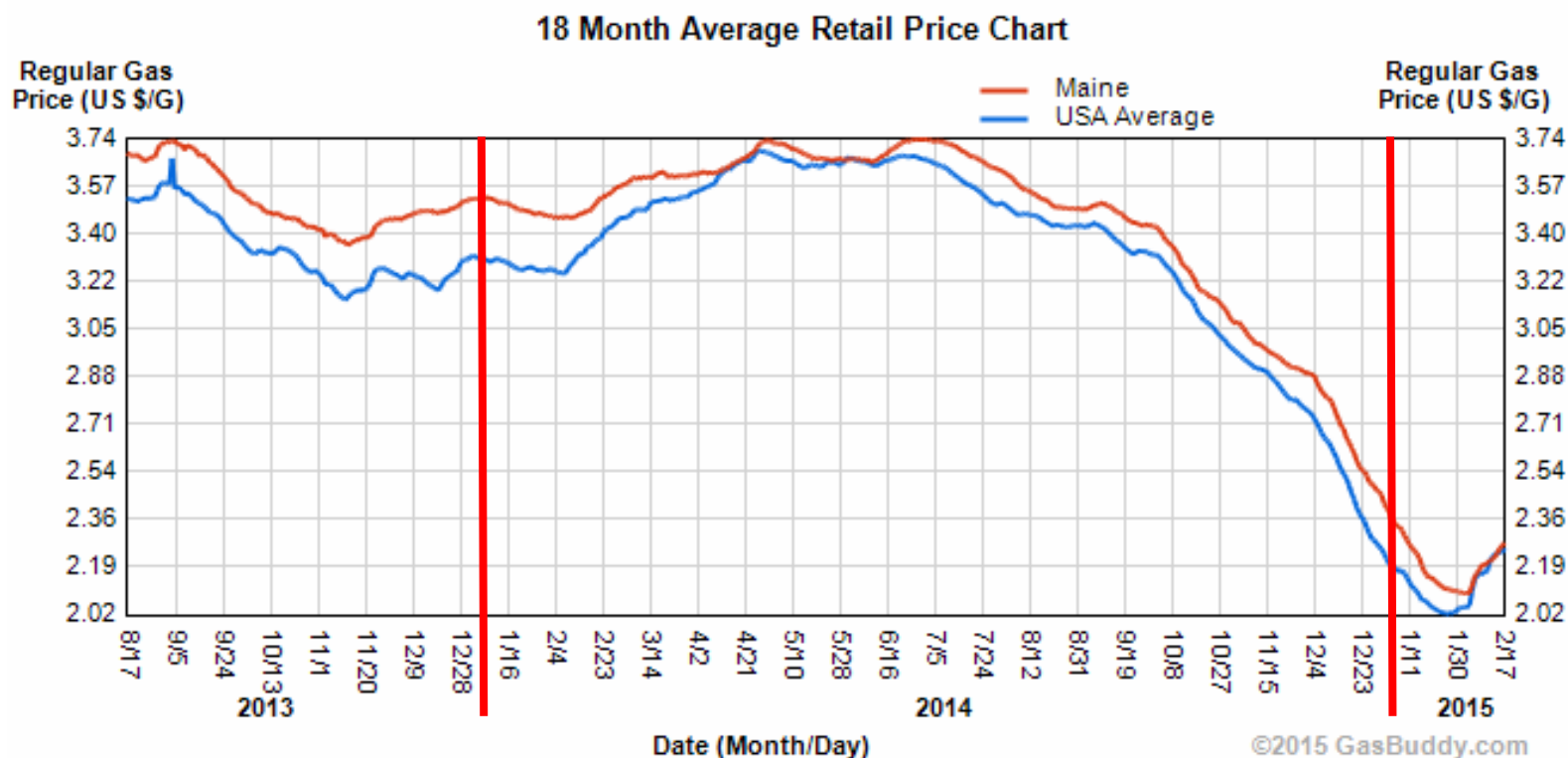
Travel Price Index* continues upward trend, still exceeding Consumer Price Index, indicating a relatively high cost of travel.
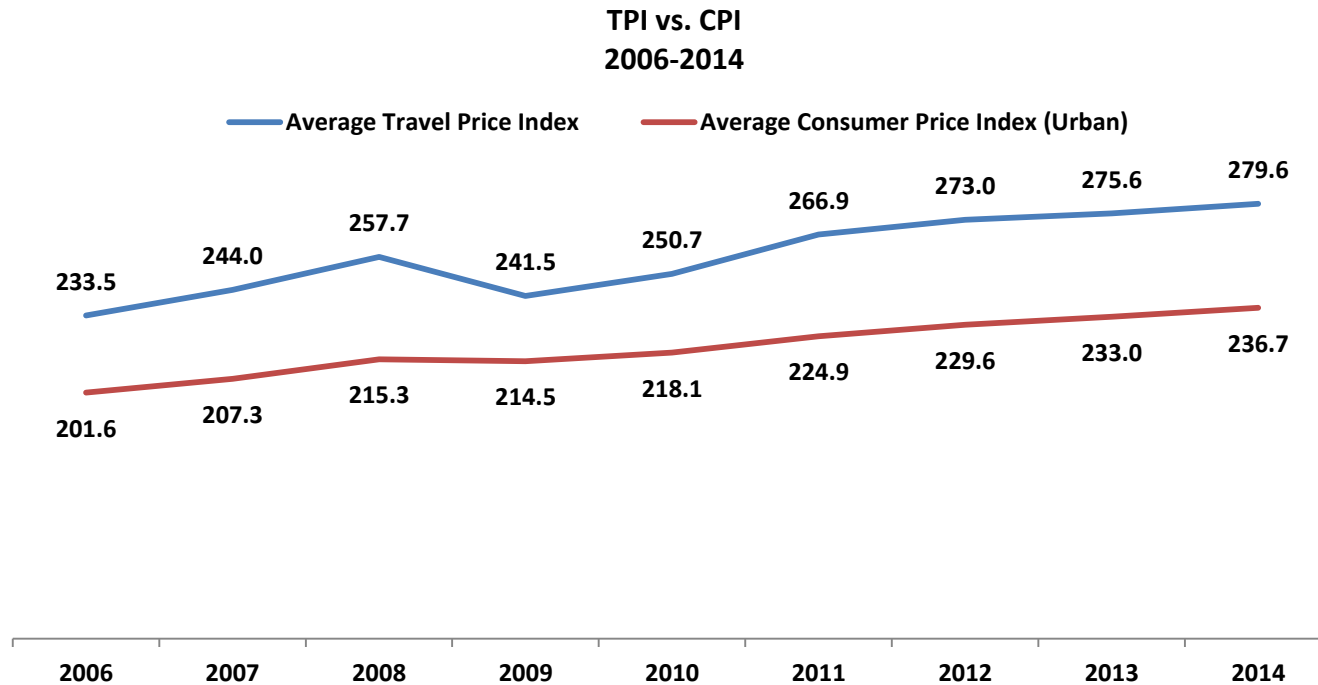
**TPI vs. CPI
2006-2014**

—— **Average Travel Price Index**   —— **Average Consumer Price Index (Urban)**

Average Travel Price Index: 233.5, 244.0, 257.7, 241.5, 250.7, 266.9, 273.0, 275.6, 279.6

Average Consumer Price Index (Urban): 201.6, 207.3, 215.3, 214.5, 218.1, 224.9, 229.6, 233.0, 236.7

2006 2007 2008 2009 2010 2011 2012 2013 2014

Canadian exchange rate has continued to decline, closing out 2014 at an average of 0.91 for the year.

Canadian Exchange Rate

2012 Average

1.0004

2013 Average

.9710

2014 Average

.9057

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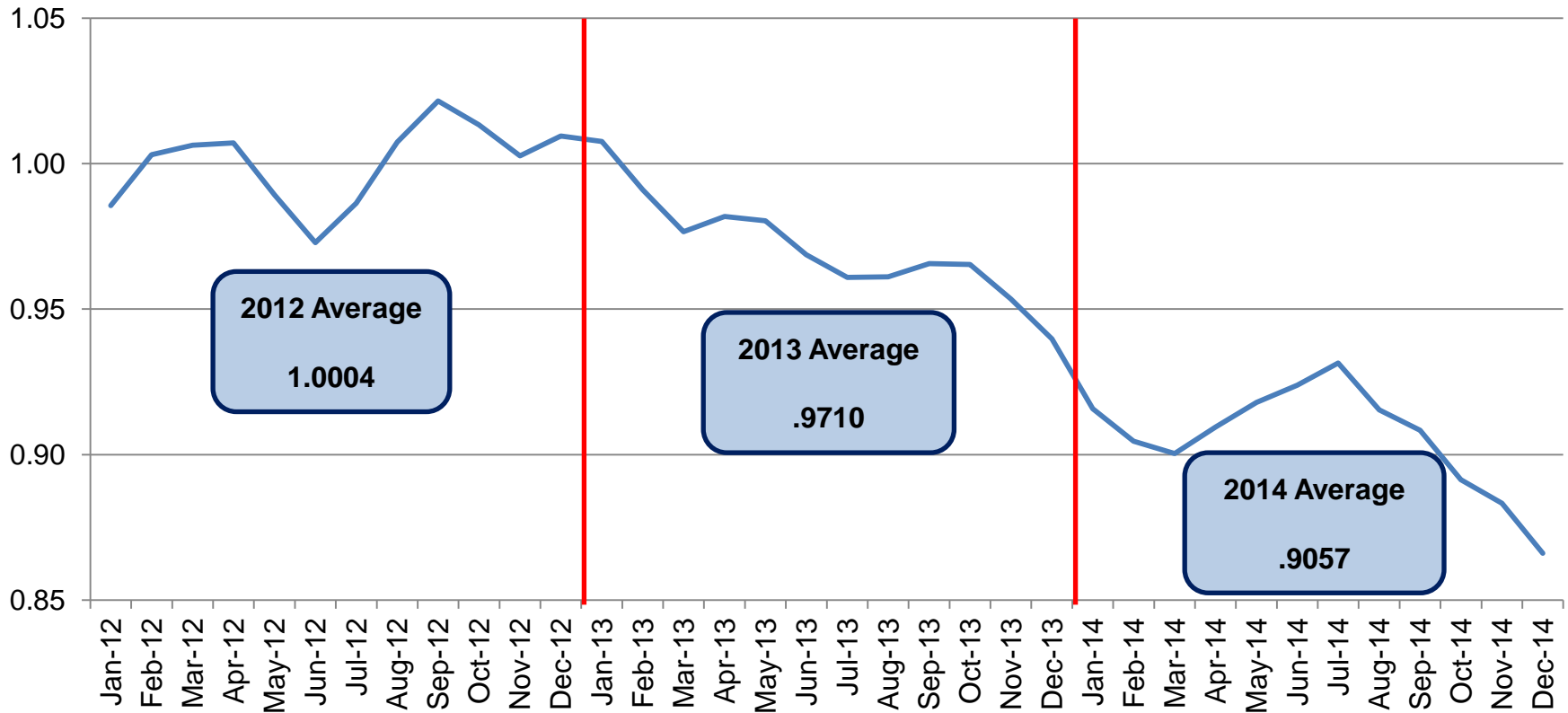
Baseline Visitor Statistics

Overnight travel among U.S. residents stable with 2013, yet still lower than levels seen in 2008-2011.

Proportion of U.S. Residents Taking a Trip

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

52%bcdefg
46%efg   47%efg   47%efg   44%g   43%g   41%

37%bcdefg
33%   35%befg   35%befg   32%   32%   32%

19%bcdefg
16%   17%befg   18%bcefg   16%   16%   15%

2008 [n=17,655] a	2009 [n=14,677] b	2010 [n=17,785] c	2011 [n=17,924] d	2012 [n=17,722] e	2013 [n=17,591] f	2014 [n=17,675] g
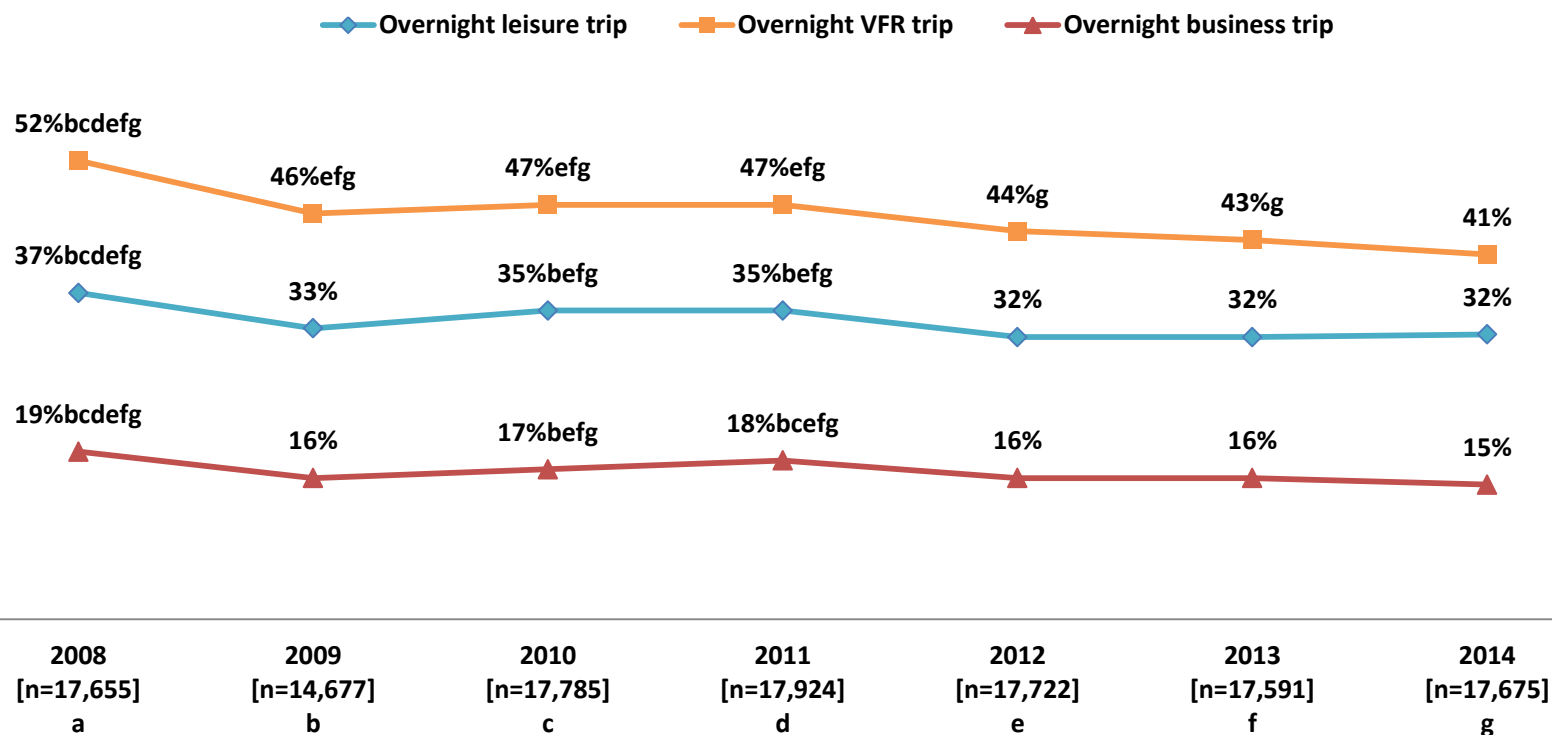
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

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Maine's overnight travel market share remains around 1%, lagging just behind CT and MA.

Maine's Overnight Market Share
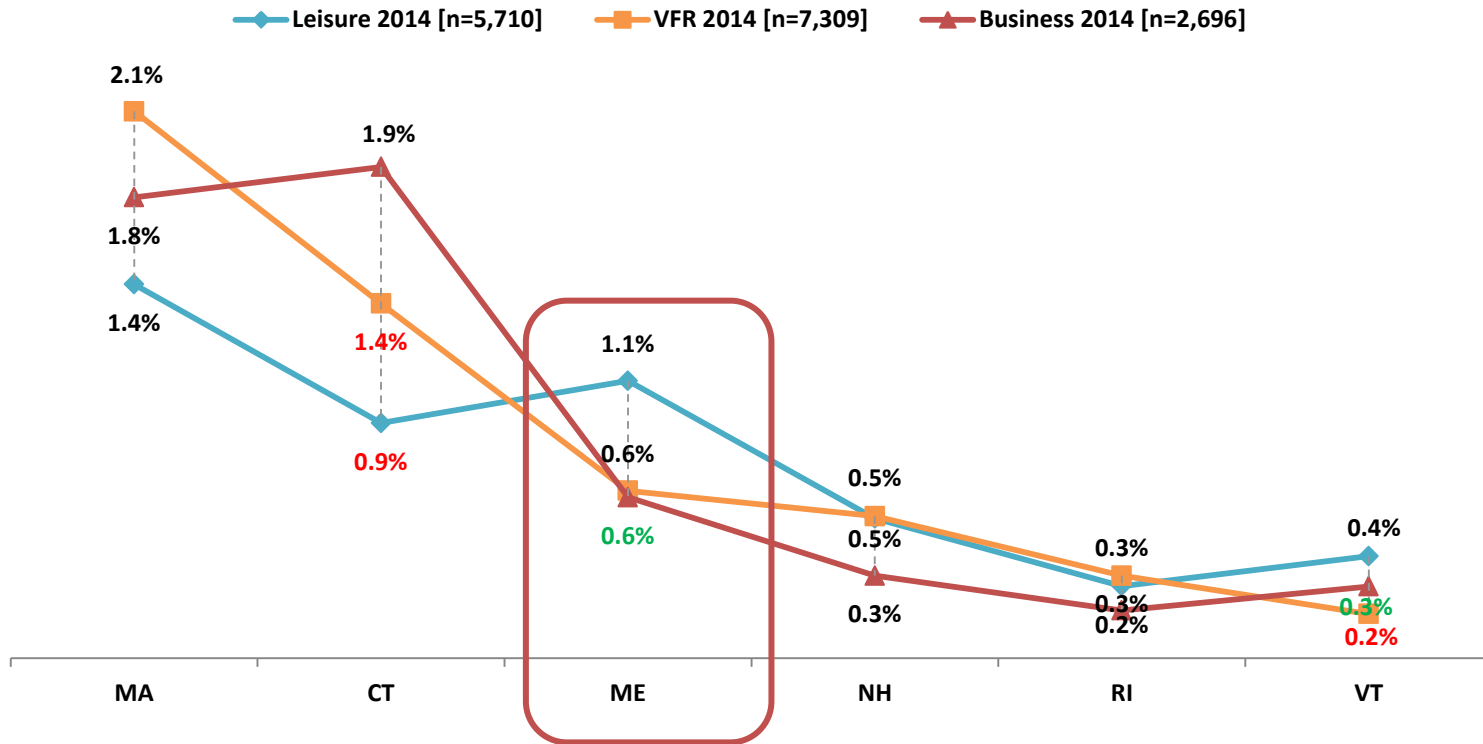
Leisure 2014 [n=5,710]   VFR 2014 [n=7,309]   Business 2014 [n=2,696]

	MA	CT	ME	NH	RI	VT
VFR	2.1%	1.4%	0.6%	0.5%	0.3%	0.3%
Business	1.8%	1.9%	0.6%	0.3%	0.2%	0.3%
Leisure	1.4%	0.9%	1.1%	0.5%	0.3%	0.4%

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Maine's estimated overnight visitation* up 4% over 2013, with greatest year-over-year percentage increase seen during the Fall season.

- A decrease in the number of *trips* taken to Maine was offset by an increase in average party size between 2013 and 2014, leading to an increase in the estimated number of visitors.

Tourism-Related Overnight Visitation

	2013 Total	2014				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**16,599,691**	**17,275,070**	**10,616,948**	**5,660,470**	**997,653**	**4.1%**
Winter	2,838,983	2,940,349	1,723,015	1,007,838	209,497	3.6%
Summer	9,060,262	9,153,821	5,762,638	2,952,140	439,043	1.0%
Fall	4,700,446	5,180,900	3,131,295	1,700,492	349,113	10.2%
NET Trips	**6,587,319**	**5,821,662**	**3,355,802**	**2,075,638**	**390,222**	**-11.6%**
Winter	1,199,202	900,761	517,719	309,435	73,607	-24.9%
Summer	3,570,489	3,046,174	1,776,350	1,089,614	180,210	-14.7%
Fall	1,817,628	1,874,727	1,061,733	676,589	136,405	3.1%

*For the purposes of visitation estimates, only visitors on tourism related trips are included.
Tourism related trips include:
- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

2014 saw increases in tourism-related visits from both residents and non-residents of Maine.

- Growth patterns of resident and non-resident visitors show some differences, with a larger percentage increase seen in resident overnight visitation than in non-resident visitation.

Tourism-Related Overnight Visitation

	2013 Total	2014				Y/Y % Difference
		Total	**Leisure**	**VFR**	**Business**	
NET Visitors	16,599,691	17,275,070	10,616,948	5,660,470	997,653	4.1%
Resident	1,097,571	1,295,167	558,474	646,383	90,310	18.0%
Non-Resident	15,502,120	15,979,902	10,058,473	5,014,086	907,342	3.1%
NET Trips	6,587,319	5,821,662	3,355,802	2,075,639	390,222	-11.6%
Resident	450,671	448,934	176,466	237,061	35,407	-0.4%
Non-Resident	6,136,648	5,372,728	3,179,336	1,838,578	354,815	-12.4%

For the purposes of visitation estimates, <u>only visitors on tourism related trips</u> 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.*

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Maine's estimated day visitation* up more than 7% over 2013, with the greatest year-over-year percentage increase seen during the Winter season.

Tourism-Related Day Visitation

	2013 Total	2014				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**19,196,009**	**20,619,830**	**12,297,869**	**7,391,735**	**930,227**	**7.4%**
Winter	2,312,087	2,663,407	1,571,546	962,553	129,309	15.2%
Summer	13,536,709	14,485,424	8,601,793	5,265,633	617,998	7.0%
Fall	3,347,213	3,471,000	2,124,530	1,163,549	182,920	3.7%
NET Trips	**7,608,470**	**7,520,635**	**4,488,793**	**2,662,796**	**369,048**	**-1.2%**
Winter	959,690	949,777	561,992	340,227	47,558	-1.0%
Summer	5,271,419	5,361,931	3,169,671	1,933,094	259,168	1.7%
Fall	1,377,361	1,208,927	757,130	389,475	62,322	-12.2%

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.*

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Non-resident day visitation experienced a large increase over 2013, with resident visitation down from 2013.

Tourism-Related Day Visitation

	2013 Total	2014				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**19,196,009**	**20,619,830**	**12,297,869**	**7,391,735**	**930,227**	**7.4%**
Resident	5,986,552	4,992,827	1,901,572	2,546,732	544,523	-16.6%
Non-Resident	13,209,457	15,627,004	10,396,297	4,845,003	385,704	18.3%
NET Trips	**7,608,470**	**7,520,635**	**4,488,793**	**2,662,794**	**369,048**	**-1.2%**
Resident	2,406,104	1,827,546	694,085	917,433	216,028	-24.0%
Non-Resident	5,202,366	5,693,089	3,794,708	1,745,361	153,020	9.4%

For the purposes of visitation estimates, only visitors on tourism related trips are included.
Tourism related trips include:
- *All leisure trips.*
- *VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.*
- *Business trips that are for a convention/conference/trade show or training/professional development.*

Visitors spend nearly $5.5 billion in Maine during 2014, 4.5% more than in 2013.

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

- *Note: The large year-over-year increase in recreation spending is largely due to a change in the recreation reporting categories utilized in the 2014 questionnaire, which led to increased recall of recreation expenditures..*

Direct Tourism Expenditures Tourism Related Trips*	Total 2013	Total 2014	Winter/Spring 2014	Summer 2014	Fall 2014	Y/Y % Difference
NET Spending	$5,233,137,187	$5,470,654,093	$778,656,371	$3,056,447,528	$1,635,550,193	4.5%
Retail Sales	$1,477,723,792	$1,470,663,741	$209,324,456	$821,657,974	$439,681,311	-0.5%
Lodging	$1,441,972,510	$1,505,195,347	$214,239,454	$840,950,738	$450,005,155	4.4%
Restaurant/Food	$1,391,625,467	$1,476,890,903	$210,210,789	$825,137,081	$441,543,033	6.1%
Gasoline	$511,313,008	$524,903,339	$74,711,236	$293,262,832	$156,929,271	2.7%
Recreation	$365,895,064	$447,480,128	$63,691,333	$250,006,582	$133,782,213	22.3%
Transportation	$44,607,346	$45,520,635	$6,479,103	$25,432,321	$13,609,211	2.0%

*For the purposes of expenditure estimates, visitors are defined as <u>all overnight visitors and all out of state day visitors on tourism related trips</u>. 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.*

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Overnight Trip Planning

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

- The proportion of travelers relying on *social media* to help them plan their trip has increased for the second year in a row (8% in 2012, 10% in 2013, and 18% in 2014). Increases from 2013 to 2014 were also seen for *friends/relatives/co-workers advice, travel guides/brochures,* and *travel magazines.*

- The type of trip these travelers are taking impacts the sources they consult for planning, with leisure and business travelers being more likely to consult the *Internet* and *travel guides, books, or magazines*. Conversely, business travelers are <u>less</u> likely to rely on the advice of *friends/relatives/co-workers*.

	NET 2014 (n=2930)	Leisure (n=1319) [a]	VFR (n=1142) [b]	Business (n=468) [c]	Winter (n=461) [d]	Summer (n=1519) [e]	Fall (n=950) [f]
The Internet	64%	72% bc	55%	64% b	63%	66%	62%
Friends/relatives/co-workers' advice	45%	38%	58% ac	34%	43%	44%	49% de
AAA	16%	17%	14%	19%	18%	16%	16%
Travel guides/brochures	17%	20% b	13%	19% b	14%	15%	22% de
Social Media	18%	14%	20% a	22% a	17%	19%	17%
Travel Books	10%	11% b	7%	18% ab	11%	9%	12%
Travel magazines	12%	13% b	8%	14% b	11%	10%	14%
Articles or travelogues	7%	7%	6%	12% ab	8%	7%	7%
Contact local convention and visitors bureaus	6%	6%	4%	13% ab	6%	6%	7%
Contact local Chambers of Commerce	5%	5%	4%	8% b	6%	6%	5%
Travel agent	5%	4%	4%	14% ab	6%	6%	5%
State tourism office	11%	12% b	8%	16% b	12%	11%	13%
Travel planning apps	11%	11%	9%	19% ab	11%	10%	14%
Other	10%	10% c	10% c	6%	7%	10% a	10% a

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

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

	NET 2014 (n=2930)	Residence				Repeat Visitation	
		Maine (n=352) [a]	New England (n=1159) [b]	Other US (n=955) [c]	Canada (n=465) [d]	First Time (n=553) [e]	Repeat (n=2377) [f]
The Internet	64%	47%	63%a	70%ab	68%	68%f	63%
Friends/relatives/co-workers' advice	45%	42%	44%	48%b	47%	51%f	44%
AAA	16%	9%	19% ad	18%ad	12%	19%	16%
Travel guides/brochures	17%	9%	15%a	23%ab	20% b	27%f	15%
Social Media	18%	18%	15%	22%b	18%	28%f	16%
Travel Books	10%	5%	6%	17% abd	12% b	20%f	8%
Travel magazines	12%	6%	8%	17% abd	13% b	19%f	10%
Articles or travelogues	7%	3%	6%a	10% abd	6%	12%f	6%
Contact local convention and visitors bureaus	6%	4%	5%	9% ab	7%	10%f	5%
Contact local Chambers of Commerce	5%	6%	5% c	7% d	3%	5%	5%
Travel agent	5%	2%	2%	10% abd	6% b	11%f	4%
State tourism office	11%	7%	10%	13%a	14%b	16%f	11%
Travel planning apps	11%	7%	9%	17%abd	9%	18%f	10%
Other	10%	19%bcd	12% cd	5%	6%	2%	11%e

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Overnight visitors staying in paid accommodations are also more likely to consult with various information sources when planning their visit to Maine.

	NET 2014 (n=2930)	Paid (n=2008) [a]	Unpaid (n=921) [b]	Yes (n=937) [c]	No (n=1992) [d]	<35 (n=849) [e]	35-44 (n=561) [f]	45-54 (n=593) [g]	55+ (n=927) [h]
		Accommodations		**Kids on Trip**		**Age**			
The Internet	64%	71% b	49%	67% d	63%	67% h	67% h	65%h	59%
Friends/relatives/co-workers' advice	45%	42%	52% a	53% d	42%	55% fgh	47% h	46% h	35%
AAA	16%	18% b	13%	19% d	15%	16%	16%	16%	17%
Travel guides/brochures	17%	20% b	12%	22% d	15%	21% gh	19% gh	14%	15%
Social Media	18%	18%	17%	28% d	13%	32% fgh	21% gh	15% h	5%
Travel Books	10%	12% b	8%	16% d	8%	17% fgh	12% gh	6%	6%
Travel magazines	12%	13% b	9%	18% d	8%	17% gh	14% gh	9%	7%
Articles or travelogues	7%	7%	6%	10% d	5%	10% gh	8% h	6%	5%
Contact local convention and visitors bureaus	6%	7% b	5%	8%	6%	8% h	9% h	6% h	3%
Contact local Chambers of Commerce	5%	6% b	4%	8% d	4%	5%	7% h	7%	4%
Travel agent	5%	5%	5%	8% d	4%	10% fgh	7% gh	3%h	1%
State tourism office	11%	13% b	8%	13%	11%	11%	13%	15% he	9%
Travel planning apps	11%	13% b	8%	17% d	9%	18% gh	15% gh	8%h	5%
Other	10%	7%	14% a	5%	11% c	5%	4%	9% ef	17% efg

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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The use of overnight trip planning resources shows minor changes between 2008 and 2014.

- After exhibiting a slight downward trend in previous years, *friends/relatives/co-workers' advice* was mentioned by a higher proportion of overnight visitors in 2014.
- Other resources showing more usage in 2014 than in prior years include *travel guides/brochures, social media,* and *travel magazines.*

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

Q16. When you were planning this recent trip in Maine, which of the following sources did you use?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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VisitMaine.com remains among top 3 online trip planning resources used by overnight visitors.

- Further, the proportion consulting *VisitMaine.com* increased over 2013 (28% to 32% in 2014).
- *TripAdvisor*, various *online search engines, Google Maps*, and the various *Maine Tourism Region websites* remain the most frequently utilized online planning resources for overnight visitors to Maine.

	NET 2014 (n=1994)	Leisure (n=993) [a]	VFR (n=680) [b]	Business (n=322) [c]	Winter (n=311) [d]	Summer (n=1063) [e]	Fall (n=621) [f]
Any (NET)	92%	92%	94%	91%	93%	91%	95%e
TripAdvisor	38%	39%	35%	38%	30%	38%d	41%d
VisitMaine.com	**32%**	**34%**	**30%**	**30%**	**32%**	**29%**	**36%e**
Online search engines (Google, Yahoo, etc.)	32%	33%	30%	32%	28%	32%	33%
Google maps	31%	31%	33%	27%	30%	30%	34%
Maine Tourism Region Websites (NET)	**26%**	**26%**	**26%**	**30%**	**25%**	**27%**	**26%**
Facebook	24%	16%	33%a	26%a	22%	23%	26%
Lodging/hotel/accommodation websites	21%	26%bc	15%	19%	20%	22%	20%
Booking websites (Expedia, Orbitz, etc.)	17%	17%	15%	21%b	18%	15%	20%
Mainetourism.com	16%	17%	15%	15%	18%	15%	17%
Google+	12%	11%	11%	15%	13%	11%	12%
YouTube	11%	9%	11%	18%ab	10%	10%	13%
Travel blogs	8%	6%	10%a	8%	7%	7%	10%
DiscoverNewEngland.com	8%	7%	7%	10%	5%	8%	8%
Twitter	7%	4%	8%a	17%ab	9%	6%	8%
Chambers of Commerce websites	6%	6%	6%	9%	5%	6%	8%
Airline websites	6%	3%	6%a	13%ab	6%	5%	7%
Zagat	4%	3%	3%	12%ab	5%	3%	5%
Convention and/or visitor bureau websites	4%	3%	2%	10%ab	4%	3%	4%
Other Maine travel web sites (Please specify)	1%	2%b	<1%	-	1%	1%	1%
Other (Please specify)	7%	8%b	5%	6%	5%	7%	7%
Did not use any of the above	5%	6%	5%	5%	6%c	7%c	2%

Q17. Which of the following web sites did you visit when planning this trip in Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Majority of Maine overnight visitors not considering other vacation destinations when planning this trip.

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

	2014 (n=2930)
Any (NET)	**26%**
New Hampshire	7%
Vermont	5%
Massachusetts	3%
New York	2%
Rhode Island	1%
Connecticut	1%
New Brunswick (NB)	<1%
Quebec (PQ) – Montreal	1%
Nova Scotia (NS)	<1%
Florida	2%
Ontario/Toronto (ON)	<1%
Maritimes - Prince Edward Island, Victoria Park	<1%
I didn't consider any others	**72%**

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

Outside New England	Maine, New England
<33%>	19%
1st time	**Repeat**
<38%>	23%
Paid Accommodations	**Unpaid Accommodations**
<28%>	20%
Kids on Trip	**No Kids**
<35%>	22%
18-44	**45+**
<32%>	20%

Q13. What other states or provinces, if any, did you consider for this specific trip?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Most overnight travelers research Maine while visiting the State.

- 2014 showed large increases in the proportion of overnight visitors that used their *mobile device* to research the local area while in Maine (53% versus 32% in 2013) and their *laptop* (36% versus 24% in 2013).

- Travelers who used their mobile device or laptop for additional research while in Maine reported mostly accessing apps/websites such as Google, TripAdvisor, Google Maps, Yelp, or Open Table.

Trip Research While in Maine

Any (NET)
- 74%
- 74%b
- 69%
- 84%ab

A mobile device (such as a smartphone or tablet)
- 53%
- 51%
- 54%
- 55%

Materials from my hotel, campground, etc.
- 24%
- 28%b
- 16%
- 32%b

A laptop
- 36%
- 31%
- 32%
- 56%ab

Other
- 2%
- 2%c
- 2%
- 1%

Legend:
- NET 2014 (n=2930)
- Leisure (n=1319) [a]
- VFR (n=1142) [b]
- Business (n=468) [c]
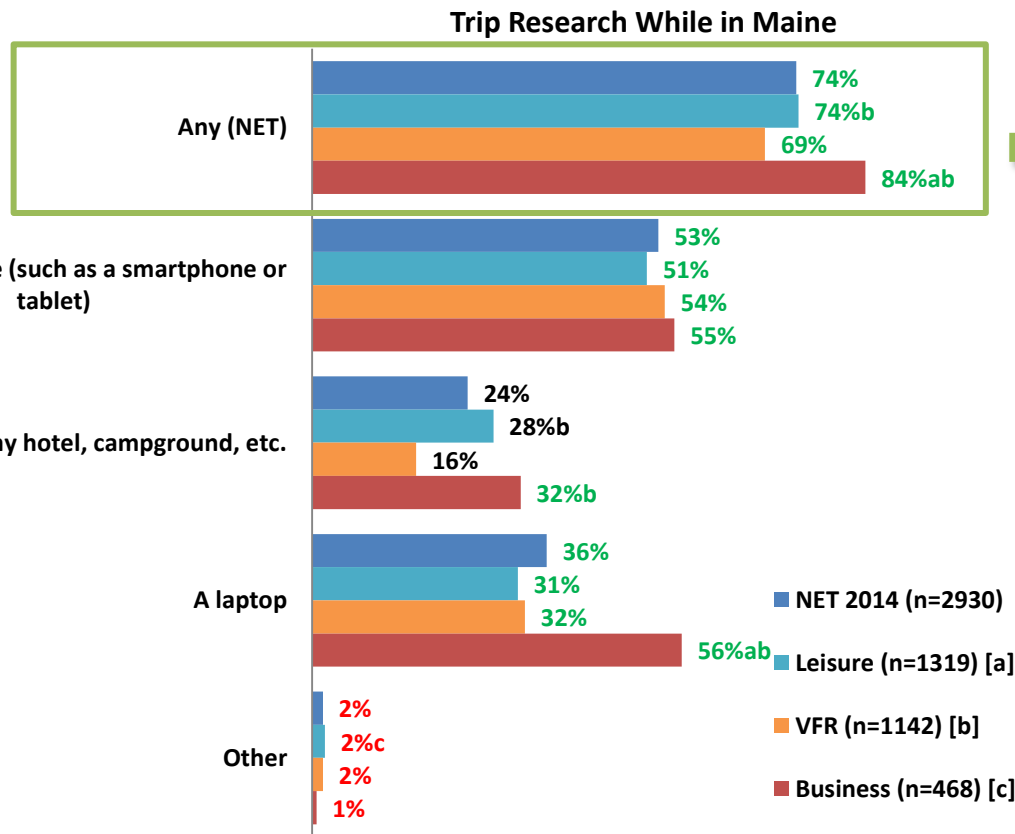
First time visitors, visitors **staying in paid accommodations**, visitors **traveling with children**, and visitors **younger than 55** are all more likely than their counterparts to continue researching Maine while visiting the State.

1st time	Repeat
<89%>	70%

Paid Accommodations	Unpaid Accommodations
<77%>	67%

Kids on Trip	No Kids
<85%>	69%

18-54	55+
<81%>	58%

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

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Overnight Visitor Travel Logistics

Average overnight travel party size around 3, with one-third bringing children.

- Like the prior year, 2014 showed another increase in the proportion of overnight visitors traveling with kids. Not surprisingly, travelers who were in Maine specifically to visit friends and relatives were more likely to be traveling with kids (37%) than were leisure (30%) or business travelers (25%).

- The Winter and Summer seasons attracted more visitors with children than the Fall season.

Travel Party Size and Composition

Average Travel Party Size 2014

US (n=2465)	Canada (n=465)
<3.0>	2.7
Paid (n=2008)	Unpaid (n=921)
<3.0>	2.7

- Percent Traveling with Children 2013
- Percent Traveling with Children 2014
- Average Number of People in Party 2013
- Average Number of People in Party 2014

% Traveling with Children 2014

Winter (n=461) a	Summer (n=1519) b	Fall (n=950) c
33%c	35%c	27%

2014 NET (n=2930)
2.7 — 2.9 — 25% — 32%

Leisure (n=1319) a
2.8 — 3.0 — 25% — 30%

VFR (n=1142) b
2.8 — 2.9 — 31% — 37%ac

Business (n=468) c
2.1 — 2.7 — 16% — 25%

Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q19. How many of these people were: Children?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Proportion of overnight visitors traveling with children continues upward trend for second year in a row.

- After remaining relatively stable for a few years, the proportion of visitors traveling with children appears to be on an upward swing, returning to the proportions seen back in 2008 and 2009.

Travel Party Size and Composition

■ Percent Traveling with Children ● Average Number of People in Travel Party

	2008	2009	2010	2011	2012	2013	2014
Avg. Number	2.7	2.7	2.6	2.7	2.7	2.7	2.9
Percent w/ Children	26%	26%	21%	22%	22%	25%	32%

Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q19. How many of these people were: Children?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
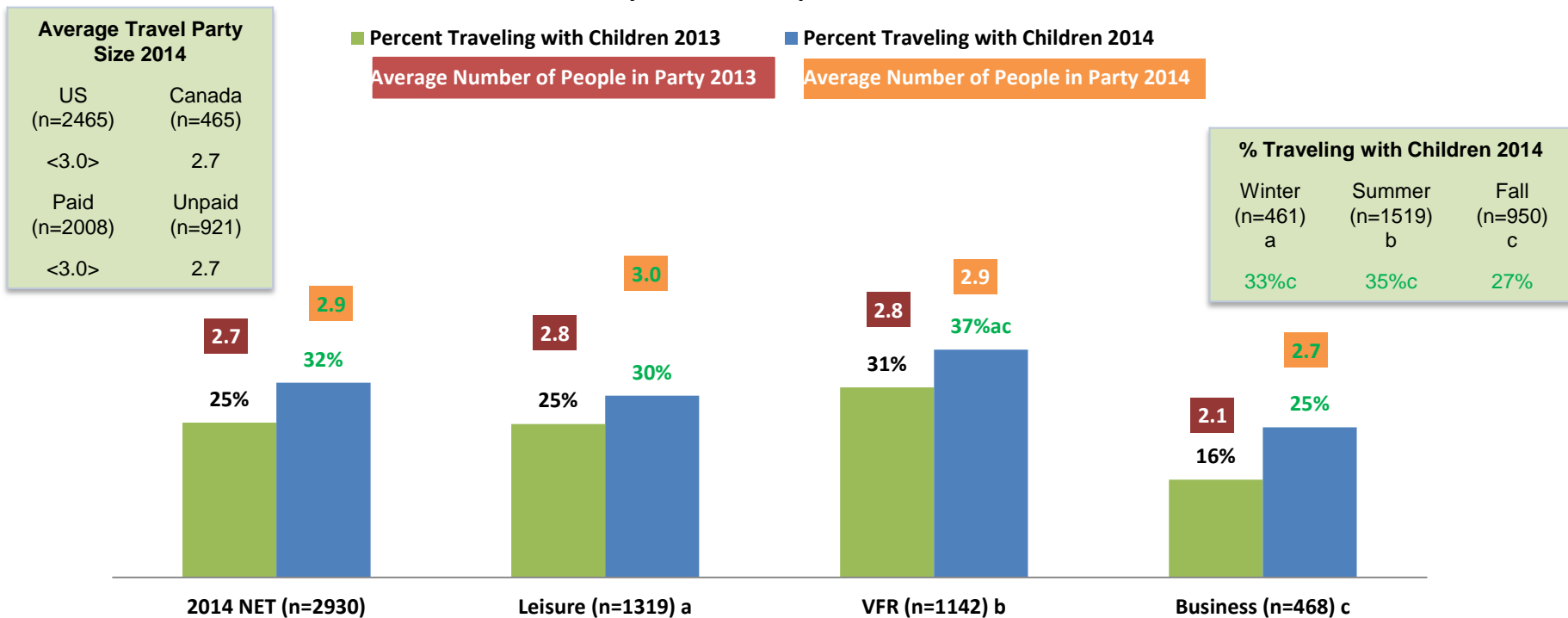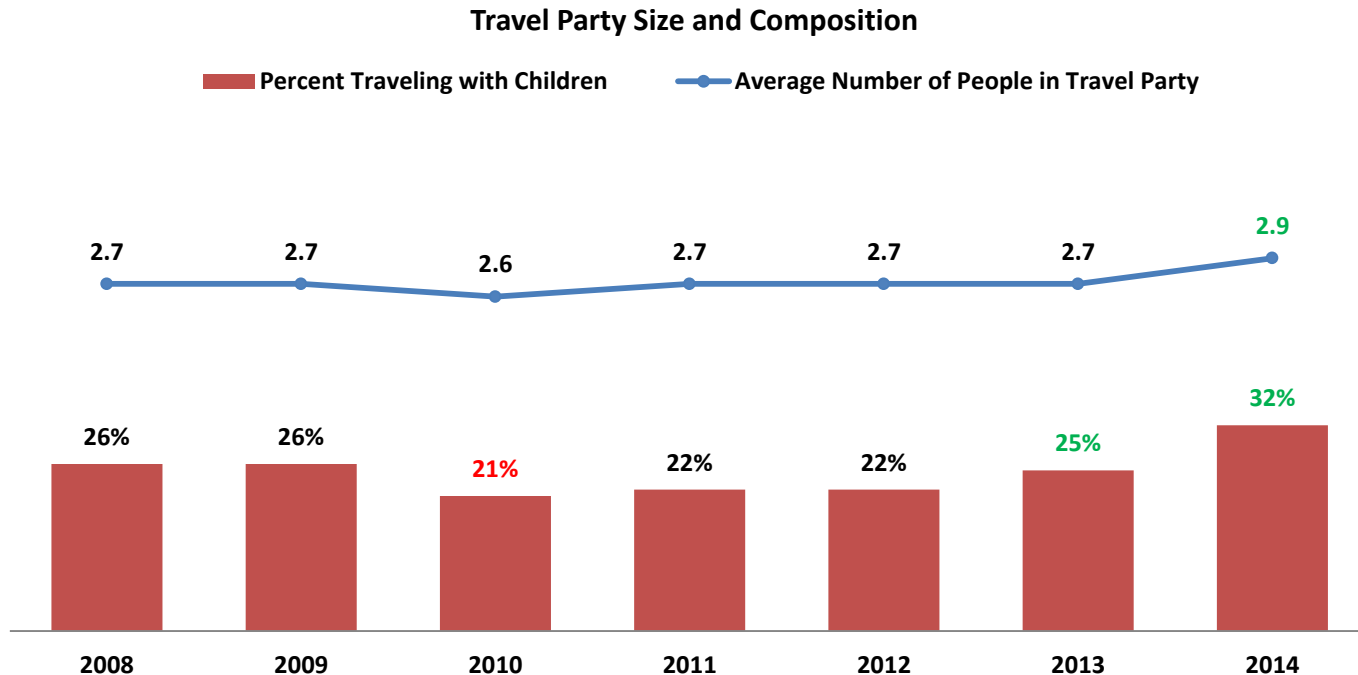
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Personal car remains dominant transportation mode among overnight guests traveling to Maine.

- 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.

Transportation Method

Personal car	
	76%
	83%c
	82%c
	44%

Airplane	
	10%
	6%
	7%
	28%ab

Rental car	
	9%
	6%
	7%
	19%ab

Train	
	1%
	1%
	1%
	3%

Other (NET)	
	4%
	5%
	3%
	5%

- 2014 NET (n=2930)
- Leisure (n=1319) a
- VFR (n=1142) b
- Business (n=468) c

Transportation Method
1st Time vs. Repeat Visitors

Personal car	
	53%
	<82%>

Rental car	
	<18%>
	6%

Airplane	
	<21%>
	7%

Train	
	2%
	1%

Other (NET)	
	5%
	4%

- 1st Time Vistor (n=553)
- Repeat Visitor (n=2377)

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

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

- As expected, leisure and business travelers are more likely to stay in paid accommodations, while VFR travelers are more likely to be staying in unpaid accommodations.
- Canadian visitors are more likely than US visitors to stay in paid accommodations (82% versus 66%). Conversely, US visitors are more likely than Canadians to stay in unpaid accommodations (34% versus 18%).

Paid Accommodations	
First Time Visitor (n=553)	Repeat Visitor (n=2377)
<77%>	66%

Paid Accommodations

Paid (NET)
- 69%
- 84%b
- 46%
- 82%b

Hotel, motel, or resort
- 52%
- 60%b
- 33%
- 75%ab

Inn or Bed & Breakfast
- 6%
- 8%bc
- 6%
- 3%

Cabin, cottage, condo, or vacation home that you rented
- 6%
- 9%bc
- 4%
- 3%

RV park or campground
- 2%
- 3%bc
- 1%
- 1%

Tent campground
- 1%
- 2%c
- 1%
- <1%

Legend:
- ■ 2014 NET (n=2930)
- ■ Leisure (n=1319) a
- ■ VFR (n=1142) b
- ■ Business (n=468) c

Unpaid Accommodations

Unpaid (NET)
- 31%
- 16%
- 54%ac
- 18%

Home, cabin, cottage, or condo of a friend, relative, or associate
- 23%
- 8%
- 46%ac
- 9%

Your own second home, cabin, cottage, or condo
- 4%
- 4%
- 4%
- 6%

At a free campground
- 1%
- 1%
- <1%
- 2%

Camping in a wilderness area
- 1%
- 2%
- 1%
- 1%

Legend:
- ■ 2014 NET (n=2930)
- ■ Leisure (n=1319) a
- ■ VFR (n=1142) b
- ■ Business (n=468) c

Q21. In which of the following types of accommodations did you spend the most nights on this trip to Maine?
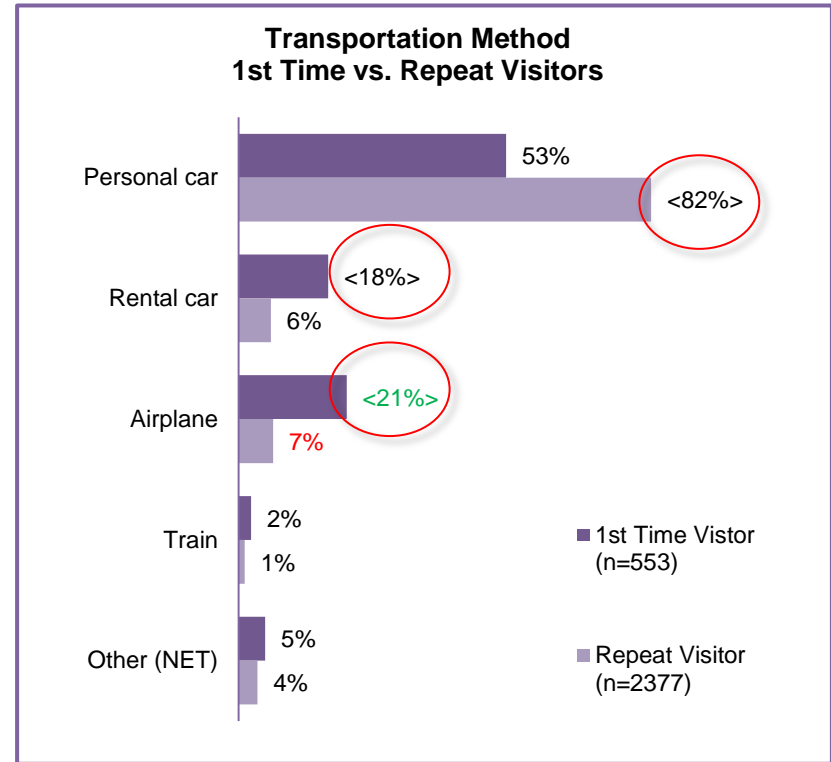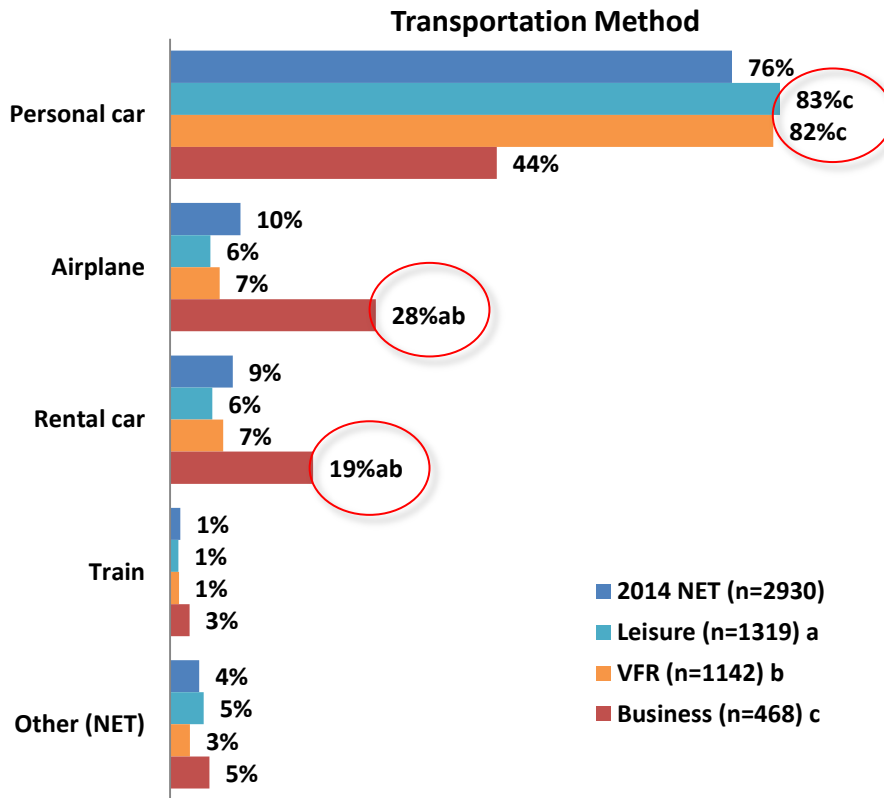<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Average length of stay among overnight visitors about 3 nights, down from 2013.

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

Average Nights Away from Home

	Kids on Trip		First-Time/Repeat Visitor		Season			Residence		
3.3	3.7b	3.2	3.6d	3.3	3.1	3.4e	3.3e	3.0	3.9hj	3.5h
2014 NET (n=2930)	Kids (n=937) a	No Kids (n=1992) b	First-Time Visitor (n=553) c	Repeat VIsitor (n=2377) d	Winter (n=461) e	Summer (n=1519) f	Fall (n=950) g	New England (n=1159) h	Other US (n=955) i	Canada (n=465) j

Q10. On this trip to Maine, how many nights were you away from home?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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2014 saw an increase in the proportion of visitors who came to Maine for the first time.

- 2014 showed a large increase in the proportion of first-time visitors (19% versus 14% in 2013).

- These first-time visitors are more likely to be visiting for leisure or business and also more likely to be from outside New England.
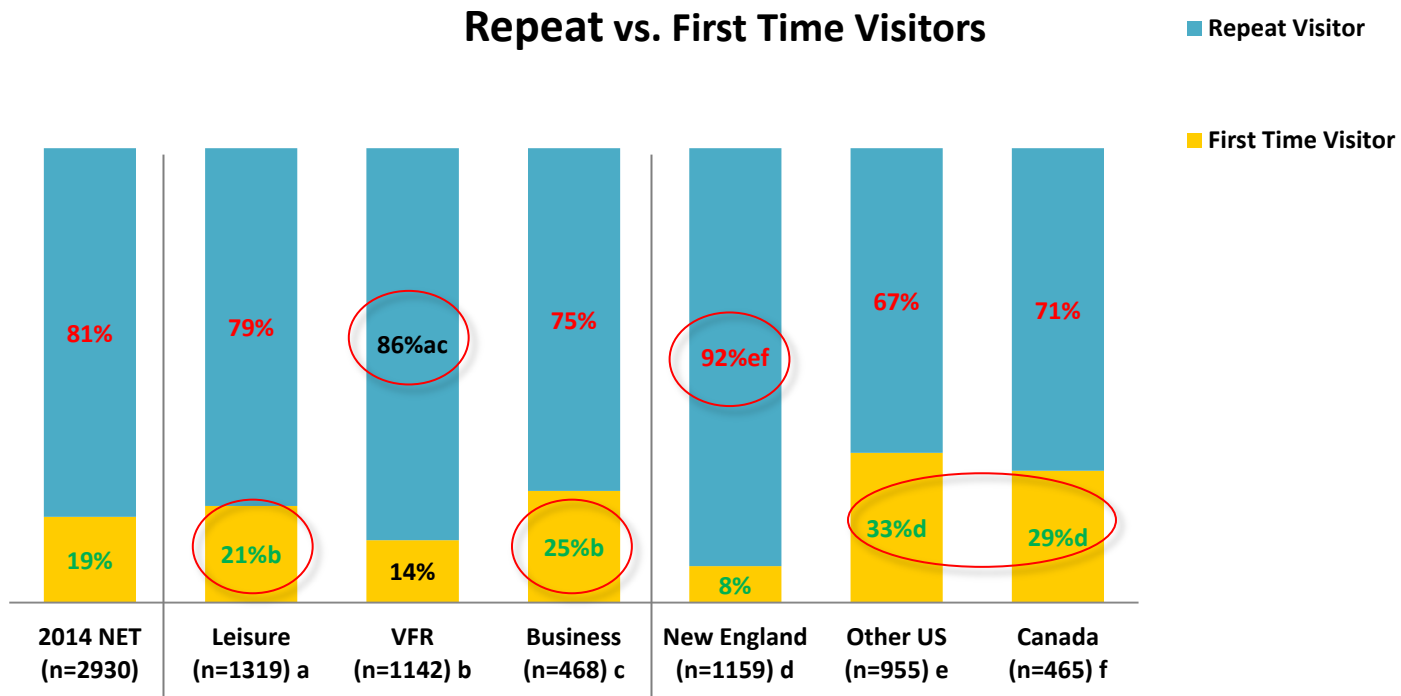
Repeat vs. First Time Visitors

■ Repeat Visitor

■ First Time Visitor

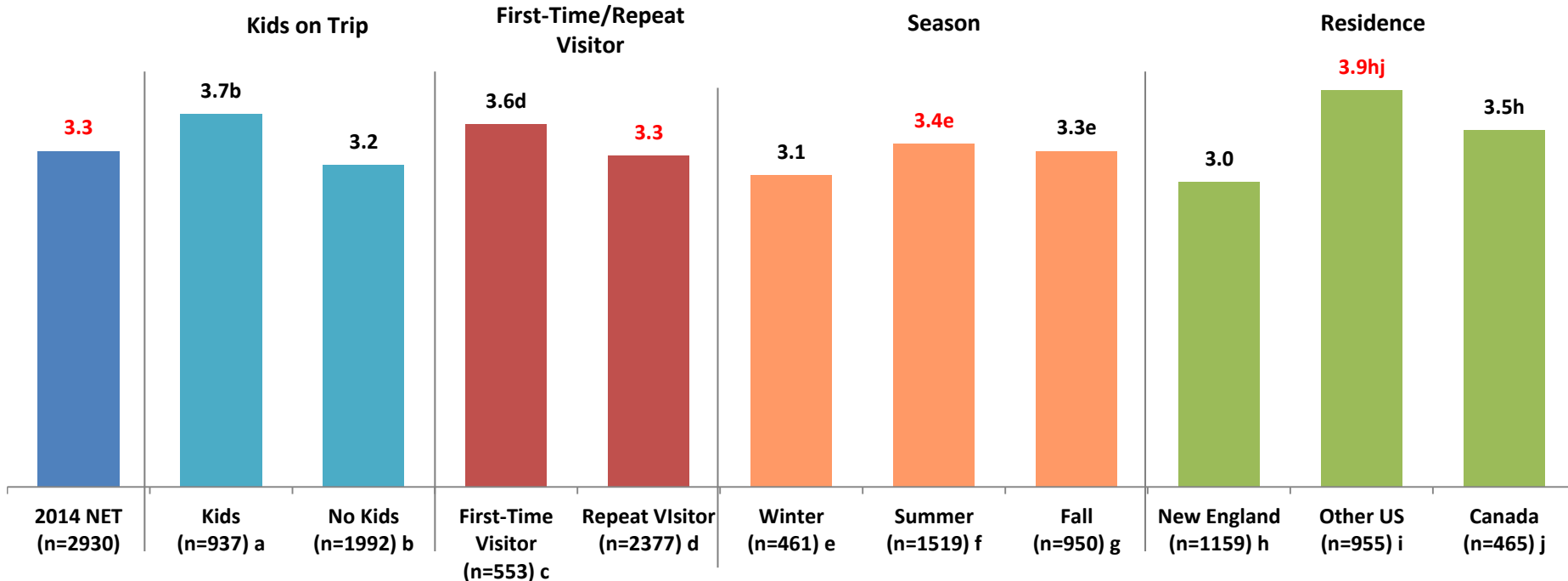|	2014 NET (n=2930)	Leisure (n=1319) a	VFR (n=1142) b	Business (n=468) c	New England (n=1159) d	Other US (n=955) e	Canada (n=465) f
Repeat Visitor	81%	79%	86%ac	75%	92%ef	67%	71%
First Time Visitor	19%	21%b	14%	25%b	8%	33%d	29%d

Q11. Was this your first visit in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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First-time visitors more likely to be seen during Summer and Fall seasons.

Younger travelers, those with **lower annual household incomes**, and those **traveling with children** are all more likely to be visiting Maine for the first time.

< 35 yrs (n=849)	35+ yrs (n=2081)
<31%>	14%

< $150k (n=2330)	$150k + (n=600)
<20%>	13%

Paid Accomm. (n=2008)	Unpaid Accomm. (n=921)
<21%>	14%

Kids on Trip (n=937)	No Kids on Trip (n=1992)
<22%>	18%

Repeat vs. First Time Visitors

	2014 NET (n=2930)	Winter (n=461) a	Summer (n=1519) b	Fall (n=950) c
Repeat	81%	85%bc	81%	79%
First Time	19%	15%	19%a	21%a

Q11. Was this your first visit in Maine?
a, b, c indicates significant difference at the 95% confidence level

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Proportion of first-time and repeat visitors stable from 2008-2013, with first-time visitation increasing in 2014.

Repeat vs. First Time Visitors Trend
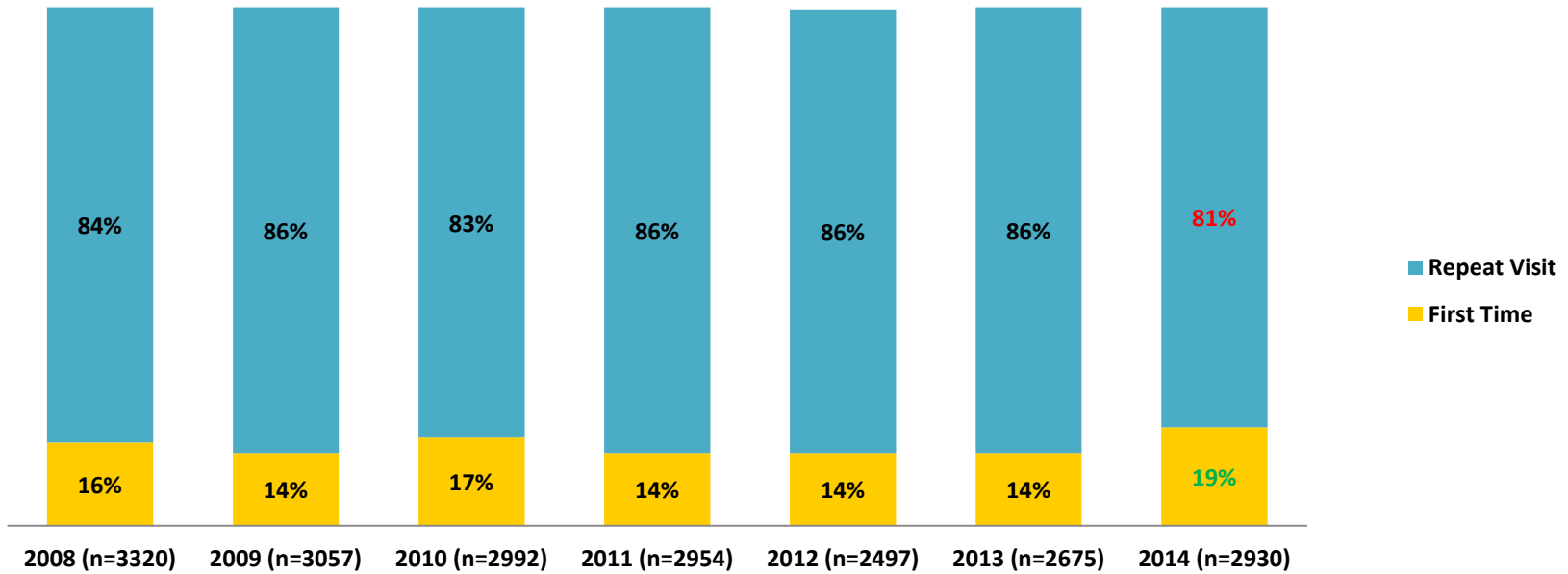
84%	86%	83%	86%	86%	86%	**81%**
16%	14%	17%	14%	14%	14%	**19%**
2008 (n=3320)	2009 (n=3057)	2010 (n=2992)	2011 (n=2954)	2012 (n=2497)	2013 (n=2675)	2014 (n=2930)

■ **Repeat Visit**
■ **First Time**

Q11. Was this your first visit in Maine?
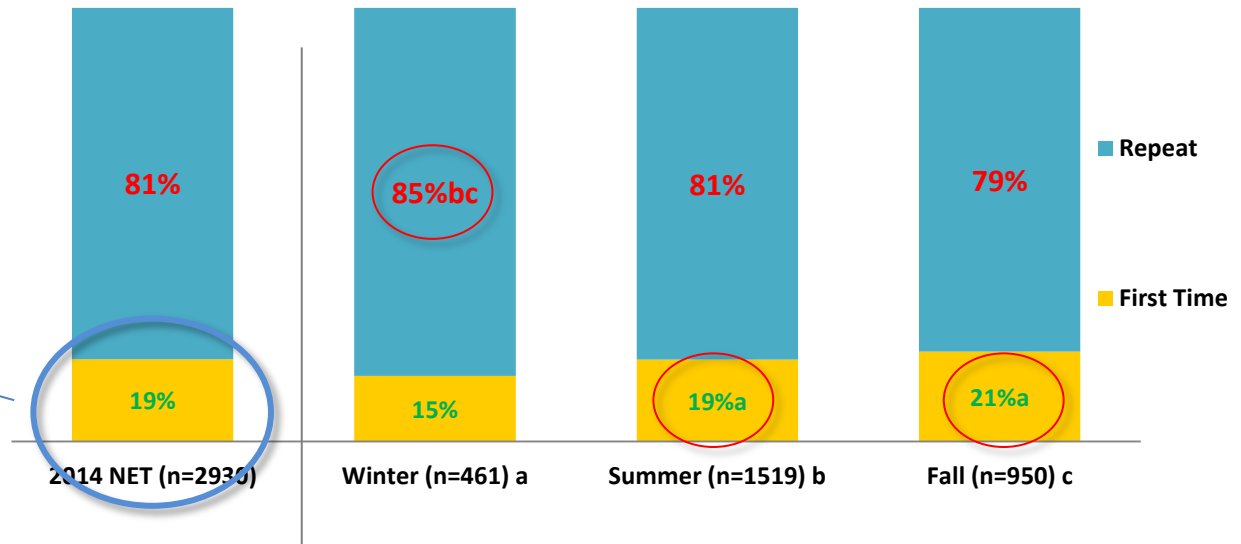<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Following two years of gains, proportion of Canadians visiting Maine returns to levels seen prior to 2012.

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

State/ Province of Residence

■ 2014 (n=2930)

United States (NET)	84%
New England (NET)	52%
Mid-Atlantic (NET)	33%
Canada (NET)	16%

MA 22% | **ME** 12% | **NH** 7% | **CT** 7% | **RI** 2% | **VT** 2%

NY 16% | **NJ** 7% | **PA** 7% | **MD** 3% | **DE** 1% | **D.C.** <1%

Ontario 7% | **Quebec** 4% | **New Brunswick** 3% | **Nova Scotia** 1%

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

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2014 brings higher proportion of visitors from New England than 2013.

- Summer travel to Maine is heavy on domestic overnight visitors, while Winter and Fall travel is more popular among Canadians. Canadian visitors from Nova Scotia are more apt to visit during the Winter months, while those from Ontario are more likely to be Fall season visitors.

- Business travelers are most likely arriving from New York, Pennsylvania, and Ontario.

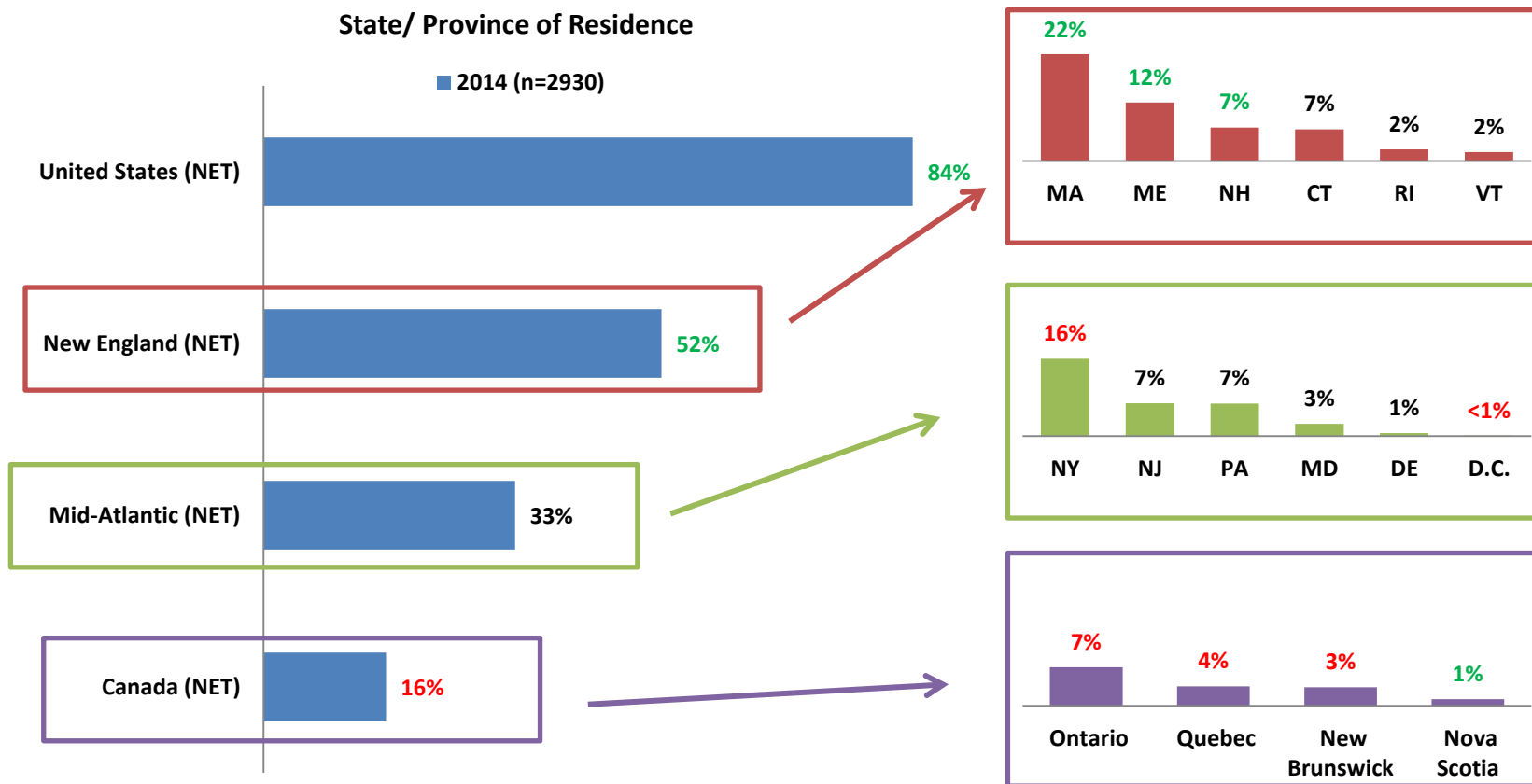|	NET 2014 (n=2930)	Leisure (n=1319) [a]	VFR (n=1142) [b]	Business (n=468) [c]	Winter (n=461) [d]	Summer (n=1519) [e]	Fall (n=950) [f]
United States (NET)	84%	81%	89%ac	81%	84%f	88%df	78%
New England (NET)	52%	50%c	58%c	39%	54%f	55%f	43%
Massachusetts	22%	23%c	25%c	13%	22%	23%	20%
Maine	12%	8%	15%a	15%a	13%	13%f	9%
Connecticut	7%	7%c	7%c	4%	7%	7%f	5%
New Hampshire	7%	7%	7%	5%	8%	7%	6%
Rhode Island	2%	2%	3%	2%	2%	3%	2%
Vermont	2%	2%c	2%c	<1%	2%	2%f	1%
Mid-Atlantic (NET)	33%	31%	31%	42%ab	30%	32%	34%
New York	16%	15%	15%	21%ab	14%	17%	15%
Pennsylvania	7%	6%	6%	9%ab	7%	6%	8%
New Jersey	7%	7%	6%	8%	7%	6%	8%
Maryland	3%	2%	2%	3%	2%	2%	3%
Delaware	1%	1%	<1%	1%	<1%	1%	<1%
Washington D.C.	<1%	<1%	<1%	-	<1%	<1%	-
Canada (NET)	16%	19%b	11%	19%b	16%e	12%	22%de
Ontario	7%	7%	6%	12%ab	6%	5%	11%de
Quebec	4%	6%b	1%	5%b	3%	3%	4%
New Brunswick	3%	6%bc	2%	1%	4%e	2%	5%e
Nova Scotia	1%	1%	1%	1%	3%ef	1%	1%
Newfoundland and Labrador	<1%	<1%	<1%	-	<1%	<1%	<1%
Prince Edward Island	<1%	<1%	<1%	-	-	<1%	<1%

State/ Province of Residence
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Mid-Atlantic region and Canada more likely to send first-time visitors to Maine, with visitors from New England more often repeat visitors.

- Within the Mid-Atlantic region, first-time visitors are more likely than repeat visitors to be coming from New York and Pennsylvania. Canadian first-time visitors are most likely to be from Ontario.
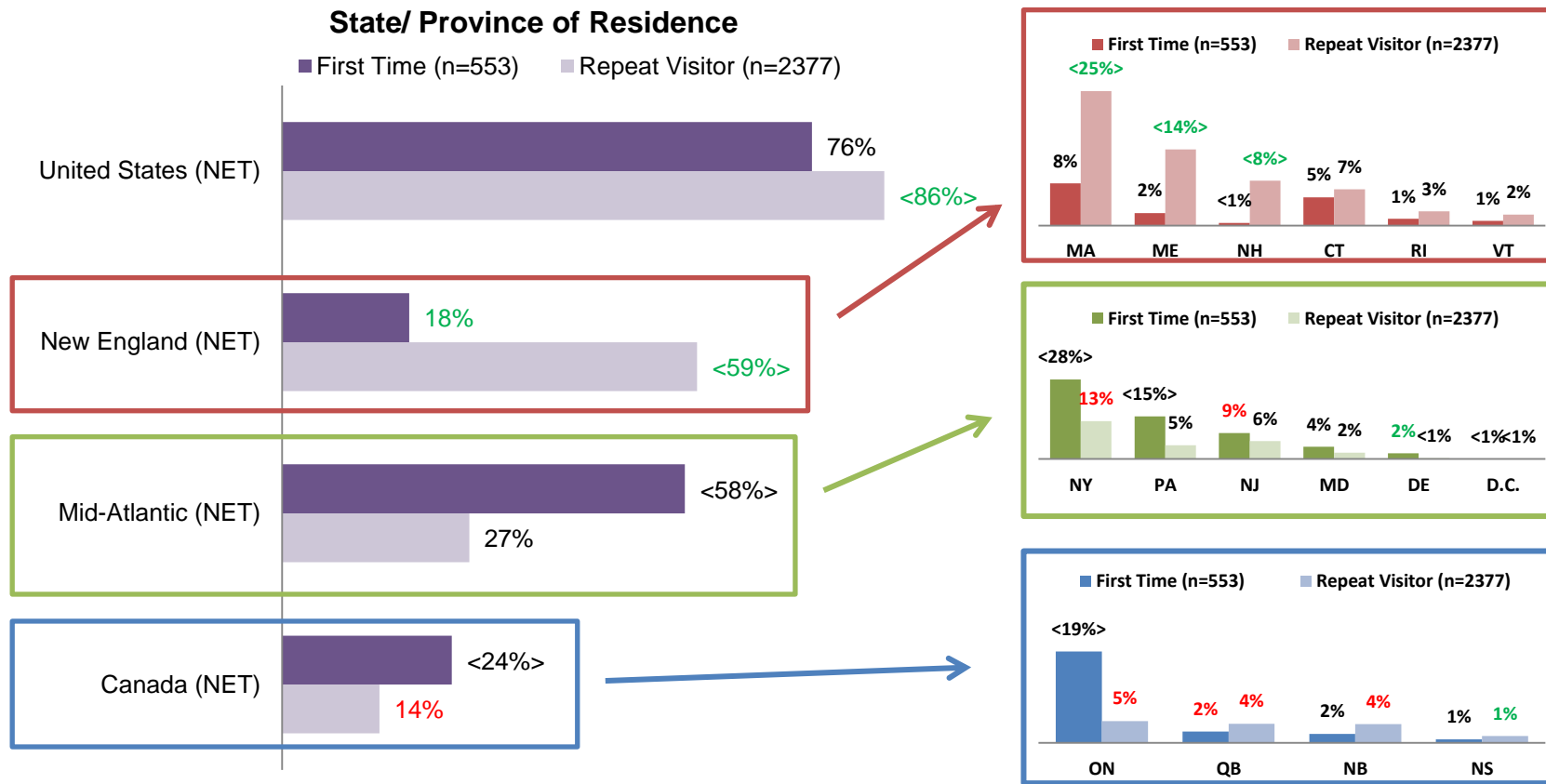
State/ Province of Residence

■ First Time (n=553) ■ Repeat Visitor (n=2377)

Following relative stability from 2008 to 2011, geographic sources of Maine overnight visitors fluctuate from 2012 through 2014.

Residence of Maine Visitors

Legend:
- New England (blue)
- Mid Atlantic (red)
- Canada (green)

X-axis: 2008 (n=3320), 2009 (n=3057), 2010 (n=2992), 2011 (n=2954), 2012 (n=2497), 2013 (n=2675), 2014 (n=2930)

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

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The Maine Overnight Visitor Experience

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

- As compared to 2013, the Maine Beaches region showed a slight drop in the proportion of overnight visitors listing it as the primary region they visited. Maine Lakes and Mountains and the Kennebec & Moose River Valley both showed increases in the proportion of overnight visitors arriving as compared to 2013.

Primary Region of Visit

Region	2013 NET (n=2675)	2014 NET (n=2930)
Maine Beaches [Southern Maine Coast]	26%	24%
Downeast & Acadia	16%	15%
Greater Portand & Casco Bay	15%	14%
Mid-Coast	12%	12%
The Maine Highlands	11%	13%
Maine Lakes and Mountains	10%	12%
Kennebec & Moose River Valley	5%	6%
Aroostook County	3%	3%

Q22. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Region of Visit – Primary and Secondary

■ Other Regions Visited
■ Primary Region Visited

Region	42%	31%	29%	26%	23%	23%	15%	8%
Other Regions Visited	18%	17%	17%	11%	11%	10%	9%	5%
Primary Region Visited	24%	14%	12%	15%	12%	13%	6%	3%

Maine Beaches | Greater Portand & Casco Bay | Mid-Coast | Downeast & Acadia | Maine Lakes and Mountains | The Maine Highlands | Kennebec & Moose River Valley | Aroostook County

Q22. What region in Maine was your primary destination?
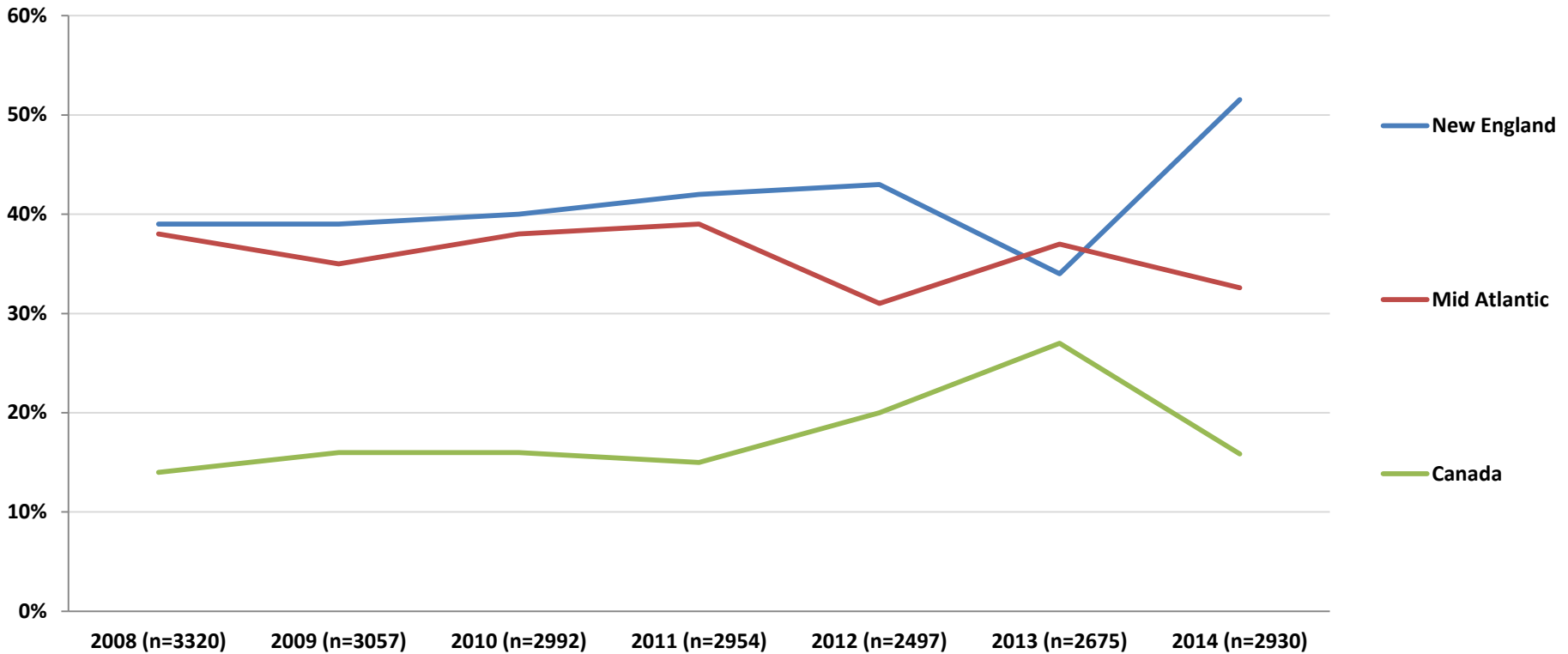Q24. What other regions, if any, did you visit while you were in Maine?
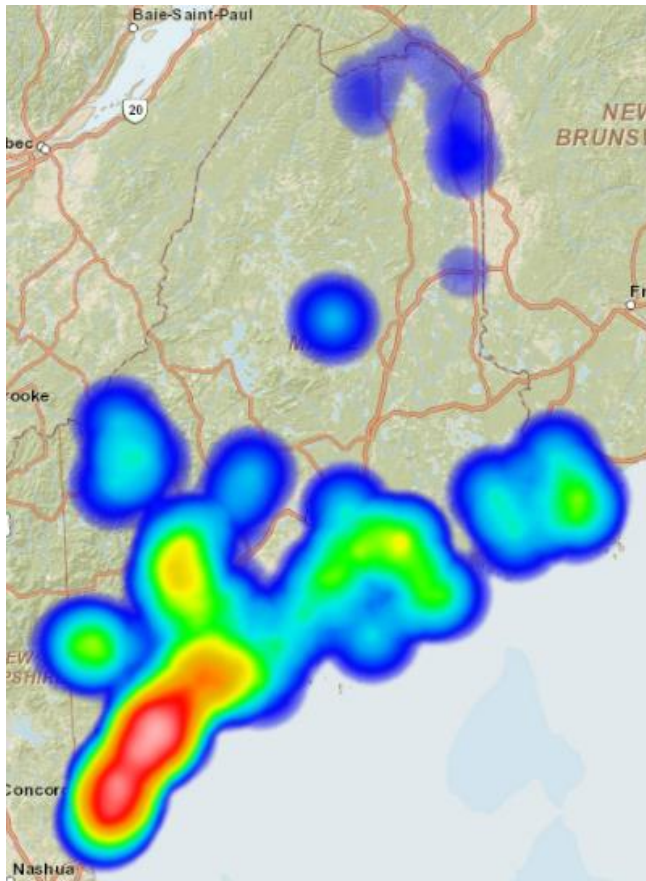<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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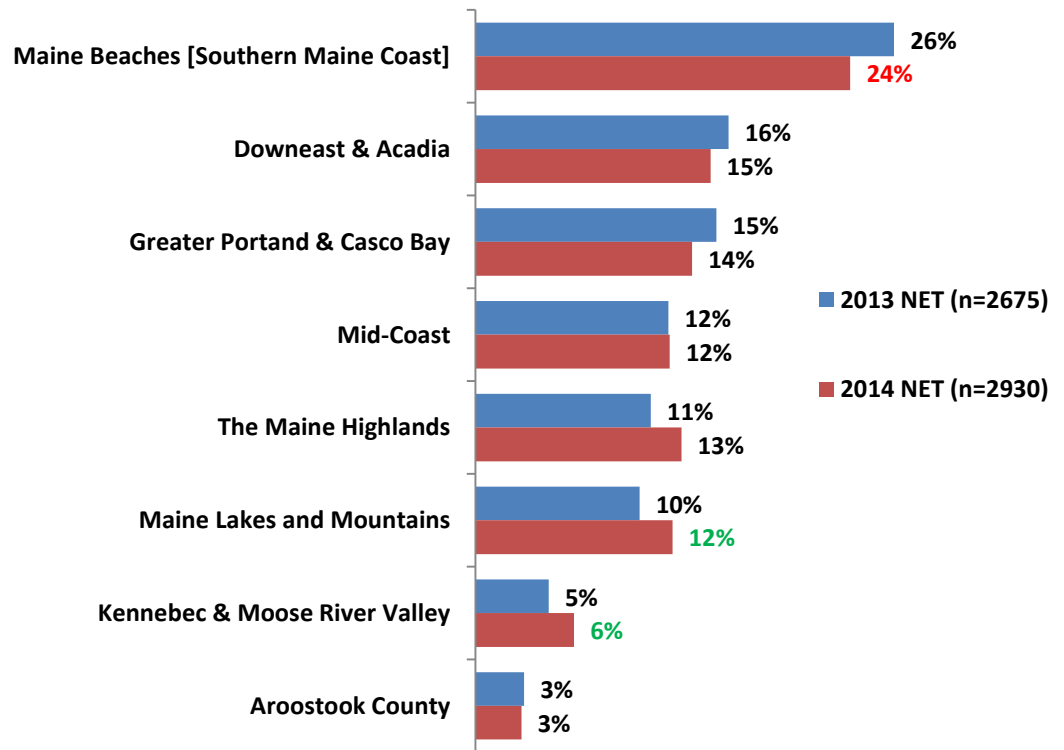
45

Primary regional overnight destinations show little seasonal variation.

- Two exceptions include:
  - Summer visitors coming to the Maine Beaches region, and
  - Winter and Summer travelers visiting the Kennebec & Moose River Valley.
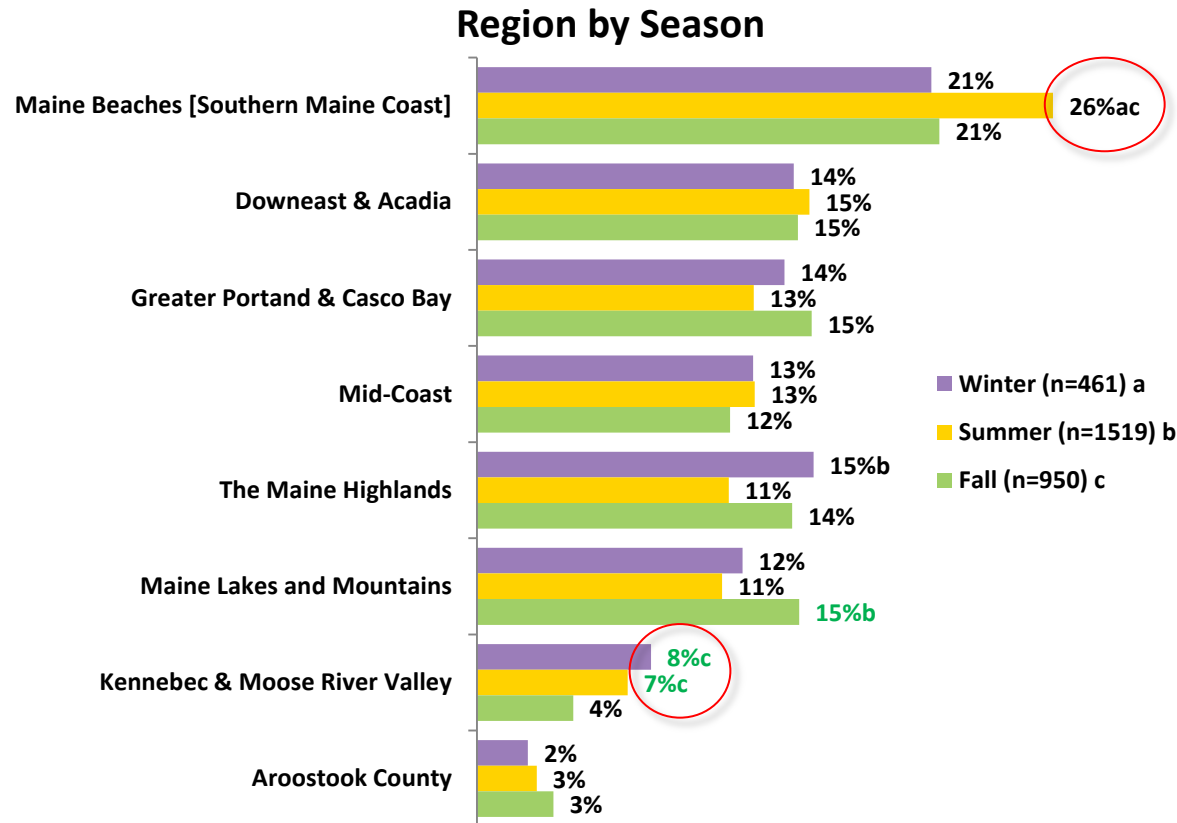
Region by Season

Region	Winter (n=461) a	Summer (n=1519) b	Fall (n=950) c
Maine Beaches [Southern Maine Coast]	21%	26%ac	21%
Downeast & Acadia	14%	15%	15%
Greater Portand & Casco Bay	14%	13%	15%
Mid-Coast	13%	13%	12%
The Maine Highlands	15%b	11%	14%
Maine Lakes and Mountains	12%	11%	15%b
Kennebec & Moose River Valley	8%c	7%c	4%
Aroostook County	2%	3%	3%

■ Winter (n=461) a
■ Summer (n=1519) b
■ Fall (n=950) c

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Leisure travelers more apt to visit Maine Beaches and Downeast regions.

- Business travelers are more prevalent in the Maine Highlands region.

Region by Trip Type

Maine Beaches [Southern Maine Coast]
- Leisure: **30%bc**
- VFR: **21%c**
- Business: **12%**

Downeast & Acadia
- Leisure: **18%bc**
- VFR: **13%**
- Business: **10%**

Greater Portland & Casco Bay
- Leisure: **13%**
- VFR: **13%**
- Business: **17%**

Mid-Coast
- Leisure: **11%**
- VFR: **13%**
- Business: **13%**

The Maine Highlands
- Leisure: **9%**
- VFR: **13%a**
- Business: **23%ab**

Maine Lakes and Mountains
- Leisure: **10%**
- VFR: **15%a**
- Business: **15%a**

Kennebec & Moose River Valley
- Leisure: **5%**
- VFR: **7%**
- Business: **7%**

Aroostook County
- Leisure: **3%**
- VFR: **3%**
- Business: **3%**

Legend:
- Leisure (n=1319) a
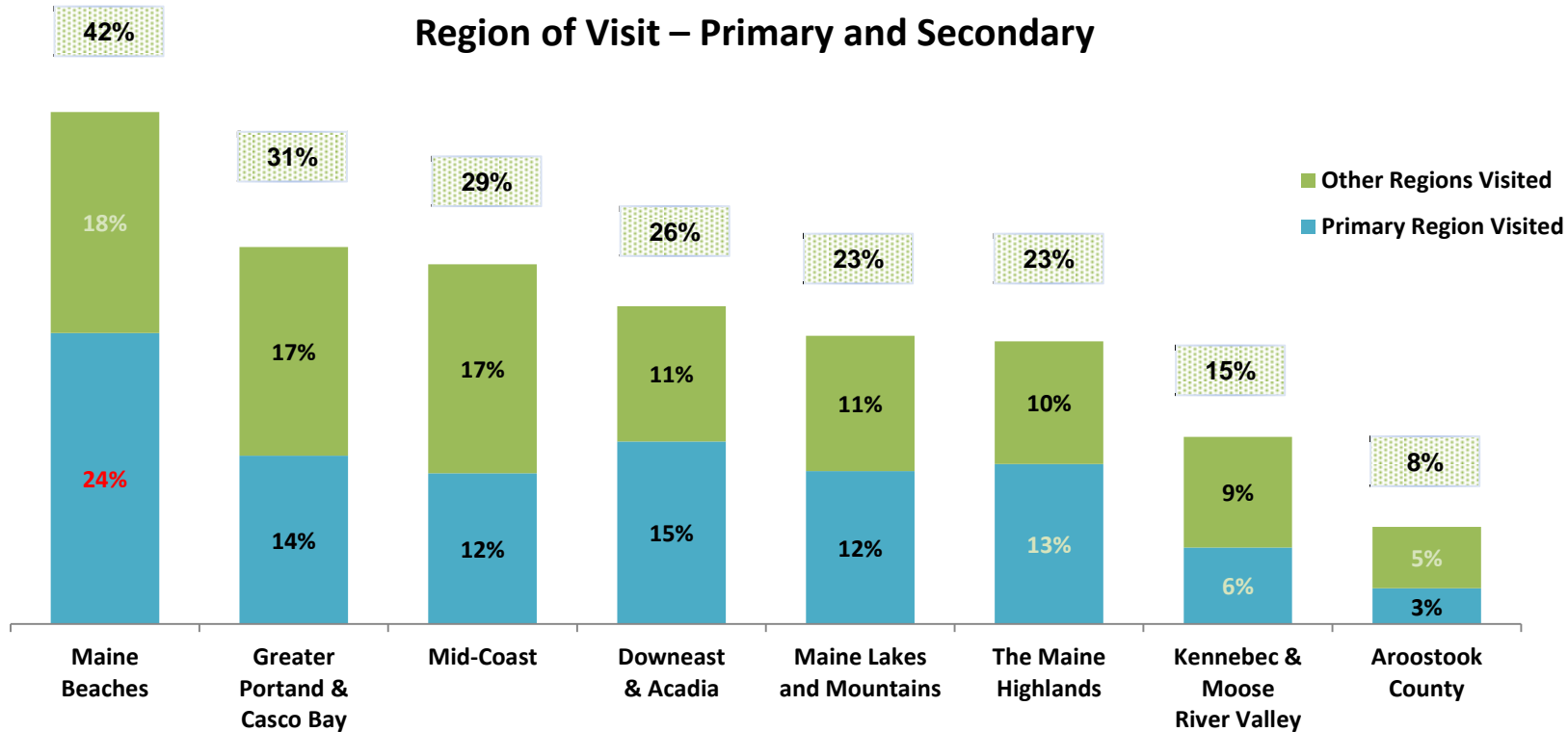- VFR (n=1142) b
- Business (n=468) c

Q22. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

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

Region by First-Time/Repeat Visitors

Region	First-Time Visitor	Repeat Visitor
Maine Beaches [Southern Maine Coast]	17%	25%a
Downeast & Acadia	19%b	14%
Greater Portland & Casco Bay	8%	15%a
Mid-Coast	14%	12%
The Maine Highlands	16%b	12%
Maine Lakes and Mountains	16%b	12%
Kennebec & Moose River Valley	6%	6%
Aroostook County	4%	3%

First-Time Visitor (n=553) a
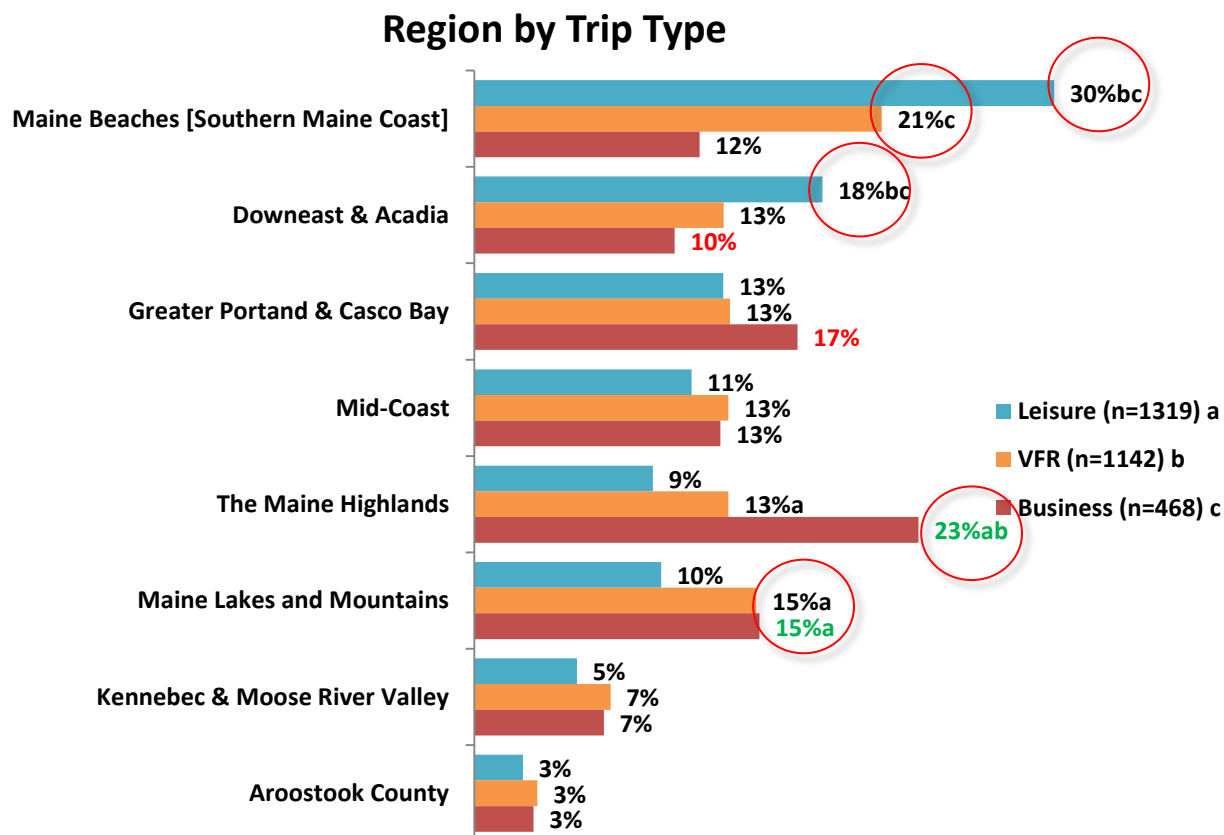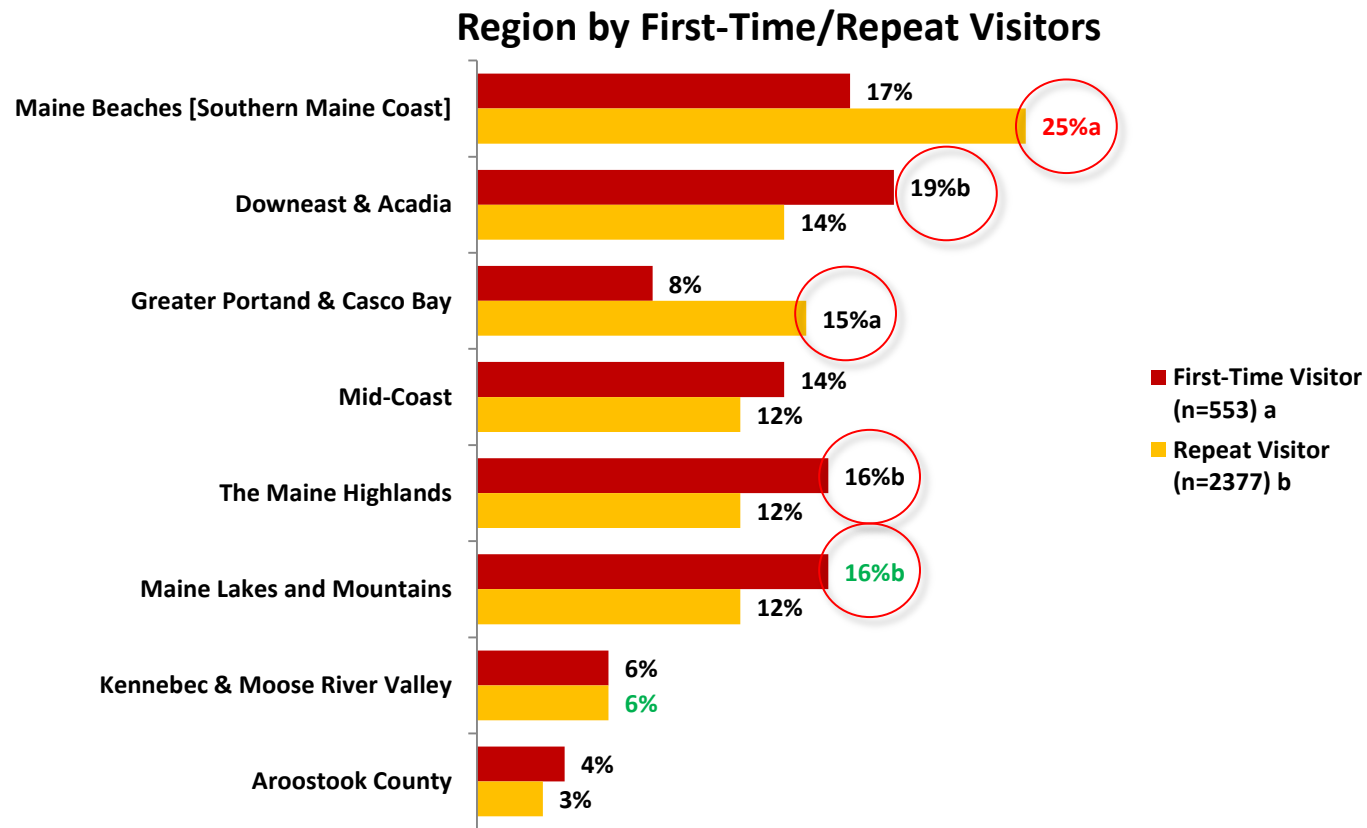**Repeat Visitor (n=2377) b**

Q22. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight visitors overwhelmingly express intent to recommend primary region visited to friends/relatives.

- Likelihood to recommend is highest for *Downeast & Acadia, the Mid-Coast,* and the *Maine Beaches region.*

Top 2 Box: Definitely/probably will recommend

Mean Number of Nights Spent

Region	Top 2 Box	Mean Nights
Downeast & Acadia [a] (n=435)	98% fgh	**1.99**
Mid-Coast [b] (n=360)	98% fgh	**1.46**
Maine Beaches [Southern Maine Coast] [c] (n=694)	98% fgh	1.84
Aroostook County [d] (n=81)	97%	**1.49**
Maine Lakes and Mountains [e] (n=365)	95%	1.82
Greater Portland & Casco Bay [f] (n=401)	94%	1.25
The Maine Highlands [g] (n=381)	93%	1.94
Kennebec & Moose River Valley [h] (n=183)	93%	1.56

Q23. How likely will you be to recommend the [primary region visited] region to friends or relatives?
Q25. How many nights did you spend in each of the region(s) you visited?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Primary purpose of VFR trip a general visit to see friends or relatives.

- The proportion of VFR travelers stating that their primary reason for visiting was to attend a *wedding* was higher in 2014 than in 2013 (12% versus 6%).

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

Primary Purpose of Overnight VFR Trips

■ VFR (n=1142)

Purpose	Percentage
General visit to see friends or relatives	61%
Wedding	12%
Holiday visit	12%
Family reunion	8%
Funeral	2%
Class reunion	1%
Other	4%

	Paid Accommodations (n=522)	Unpaid Accommodations (n=620)
General visit to see friends/relatives	50%	<70%>
Wedding	<19%>	6%
Holiday visit	<14%>	10%

Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
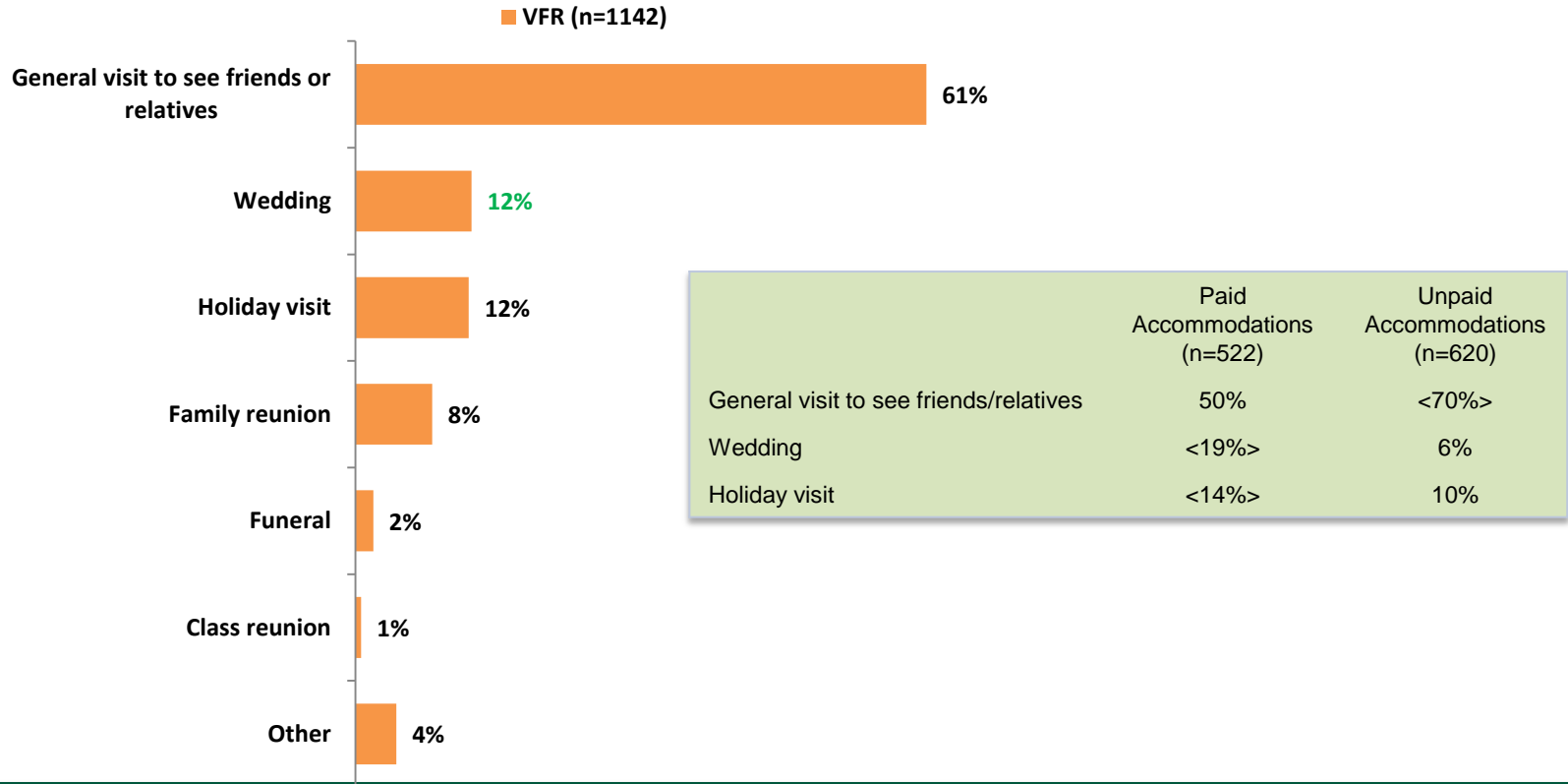<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Business travelers most likely in Maine for general meeting or convention/conference/trade show.

- Similar to 2013 results, business travelers in Maine for the first time are more likely than repeat visitors to be in Maine for a *convention/conference/trade show* (37% versus 21% among repeat visitors), once again illustrating the importance of convention/conference business in introducing Maine to potential future visitors.

- Compared to 2013, fewer business travelers indicated that they were in Maine for a *general meeting* (33% versus 44% in 2013), while a higher proportion were visiting for a *convention, conference, or trade show* (25% versus 17%).

Primary Purpose of Overnight Business Trips

■ Business (n=468)

Purpose	Percentage
Meeting	33%
Convention/Conference/Trade Show	25%
Training/Professional Development	18%
Sales/Service	15%
Other	9%

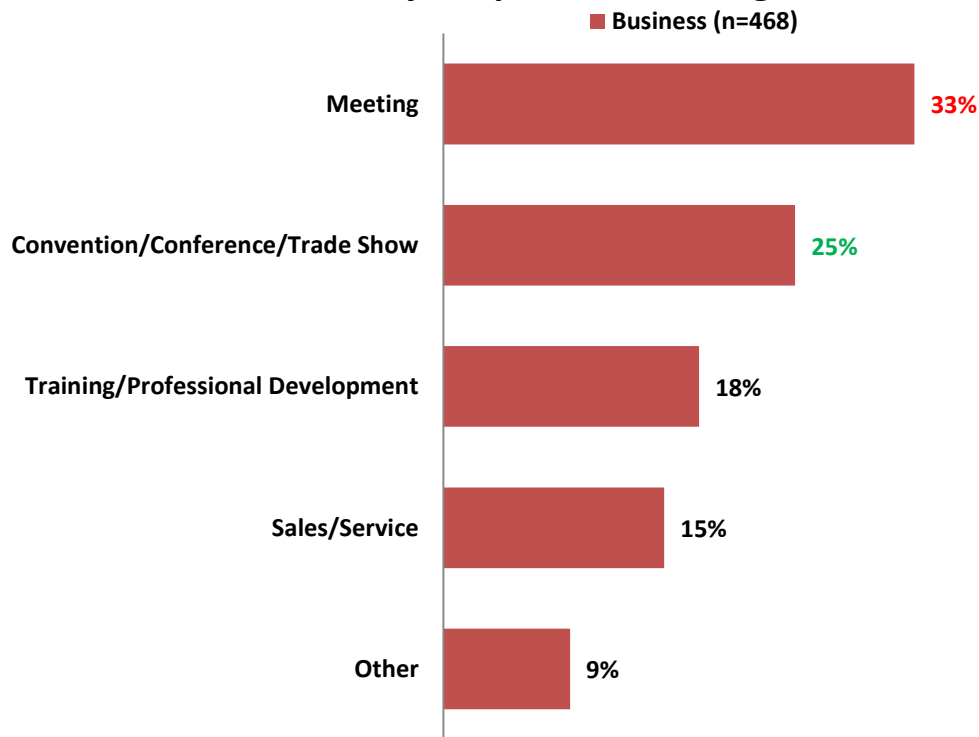Q8. What was the primary purpose of your most recent business trip in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Among those who selected *touring/sightseeing* as an interest area, more than half (52%) ranked it as the <u>most important</u> interest in their decision to visit Maine. A similar proportion of those who selected *family fun or children's activities* (48%) selected that interest as their most important.
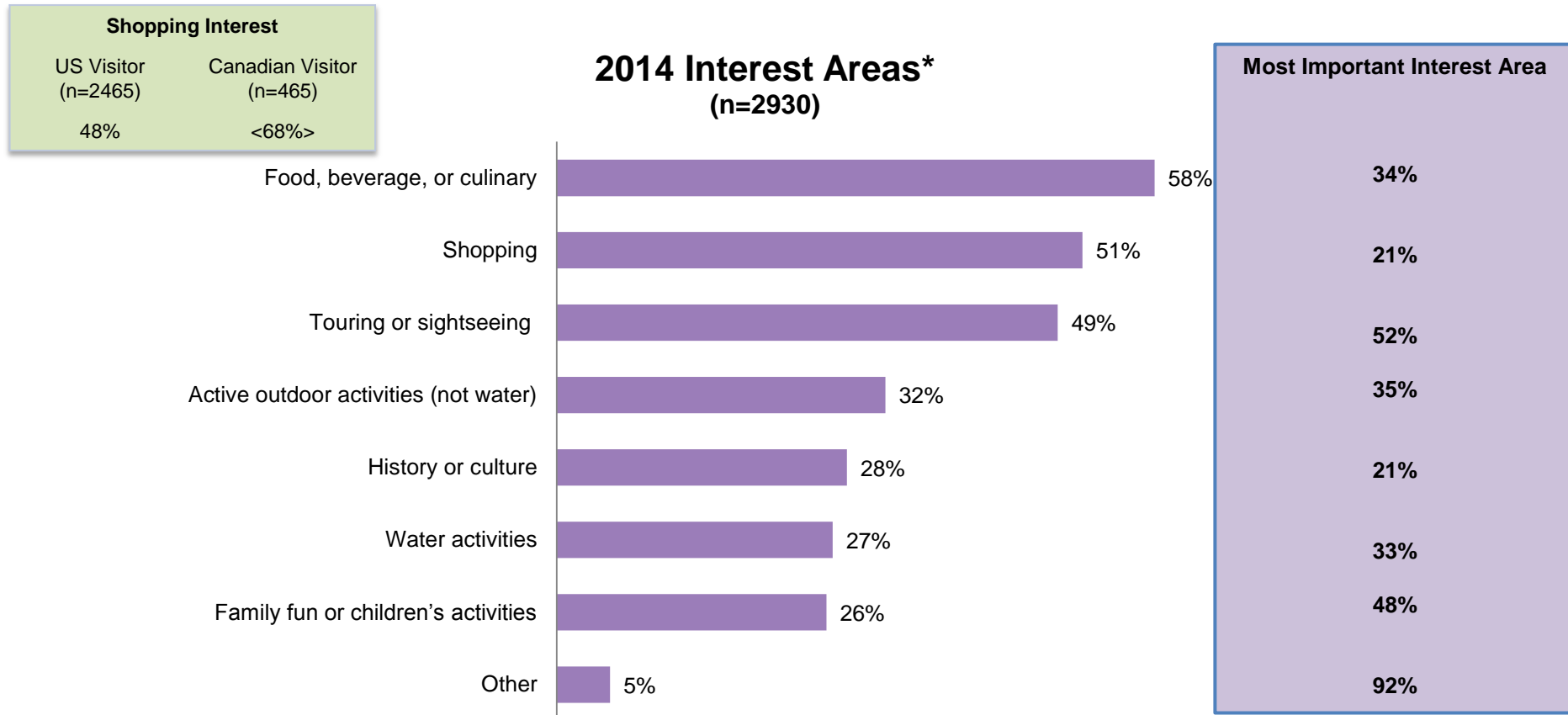
Shopping Interest	
US Visitor (n=2465)	Canadian Visitor (n=465)
48%	<68%>

2014 Interest Areas*
(n=2930)

Most Important Interest Area

Interest Area	2014 Interest Areas	Most Important Interest Area
Food, beverage, or culinary	58%	**34%**
Shopping	51%	**21%**
Touring or sightseeing	49%	**52%**
Active outdoor activities (not water)	32%	**35%**
History or culture	28%	**21%**
Water activities	27%	**33%**
Family fun or children's activities	26%	**48%**
Other	5%	**92%**

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Touring/sightseeing and *food/beverage/culinary* activities rank highest when analyzing both interest and importance.

2014 Interest Areas
Importance Index*
(n=2930)

Interest Area	Percentage
Touring or sightseeing	25%
Food, beverage, or culinary	20%
Family fun or children's activities	13%
Shopping	11%
Active outdoor activities (not water)	11%
Water activities	9%
History or culture	6%
Other	5%

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

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Interest areas differ by season, first-time/repeat visitor status, and presence of children.

- First-time visitors are more likely to be interested in *touring/sightseeing, active outdoor activities,* and *history/culture.* Not surprisingly, *water activities* are more likely to be an interest during the Summer months.

- Visitors traveling with children are more likely to list <u>all</u> interest areas except for *food/beverage/culinary* and *touring/sightseeing.*

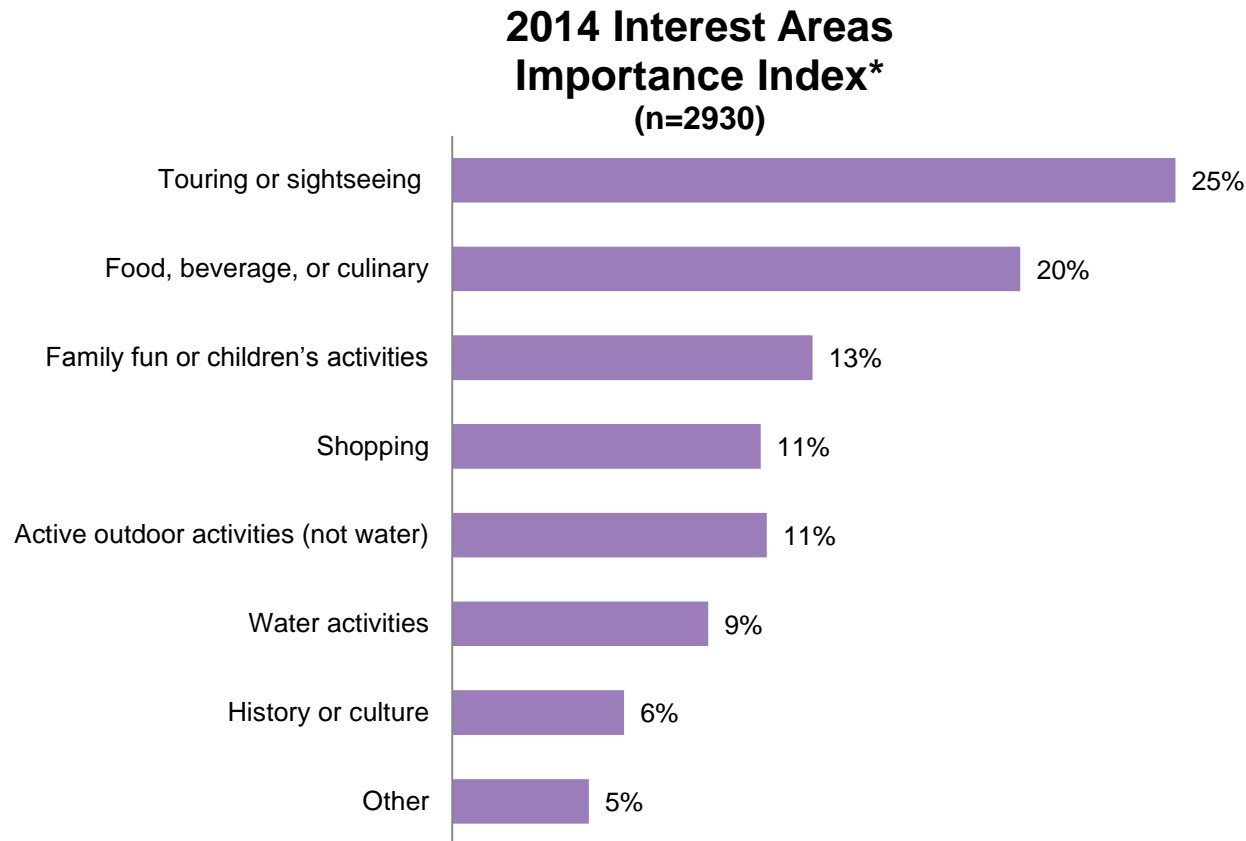| Interest Area	NET 2014 (n=2930)	Kids on Trip		First-Time/Repeat		Season		
		Kids (n=937) a	No Kids (n=1992) b	First-Time (n=553) c	Repeat (n=2377) d	Winter (n=461) e	Summer (n=1519) f	Fall (n=950) g
Food, beverage, or culinary	58%	55%	60%a	61%	58%	55%	58%	61%e
Shopping	51%	55%b	50%	47%	52%	57%f	47%	55%f
Touring or sightseeing	49%	50%	49%	66%d	45%	44%	47%	55%ef
Active outdoor activities (not water)	32%	42%b	27%	37%d	31%	32%	33%	30%
History or culture	28%	32%b	27%	43%d	25%	26%	27%	32%e
Water activities	27%	41%b	21%	29%	26%	17%	35%eg	19%
Family fun or children's activities	26%	59%b	11%	30%	26%	24%	28%	24%
Other	5%	3%	6%a	2%	6%c	6%	5%	5%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

Touring or Sightseeing Activities
(n=1434)

Activity	Percentage
Sightseeing	71%
Enjoying the ocean views or rocky coast	64%
Driving for pleasure	59%
Enjoying the mountain views	43%
Wildlife viewing or bird watching	25%
Viewing fall colors	25%
Taking tours of communities or local architecture	18%
Nature cruises or tours	15%
Other	2%
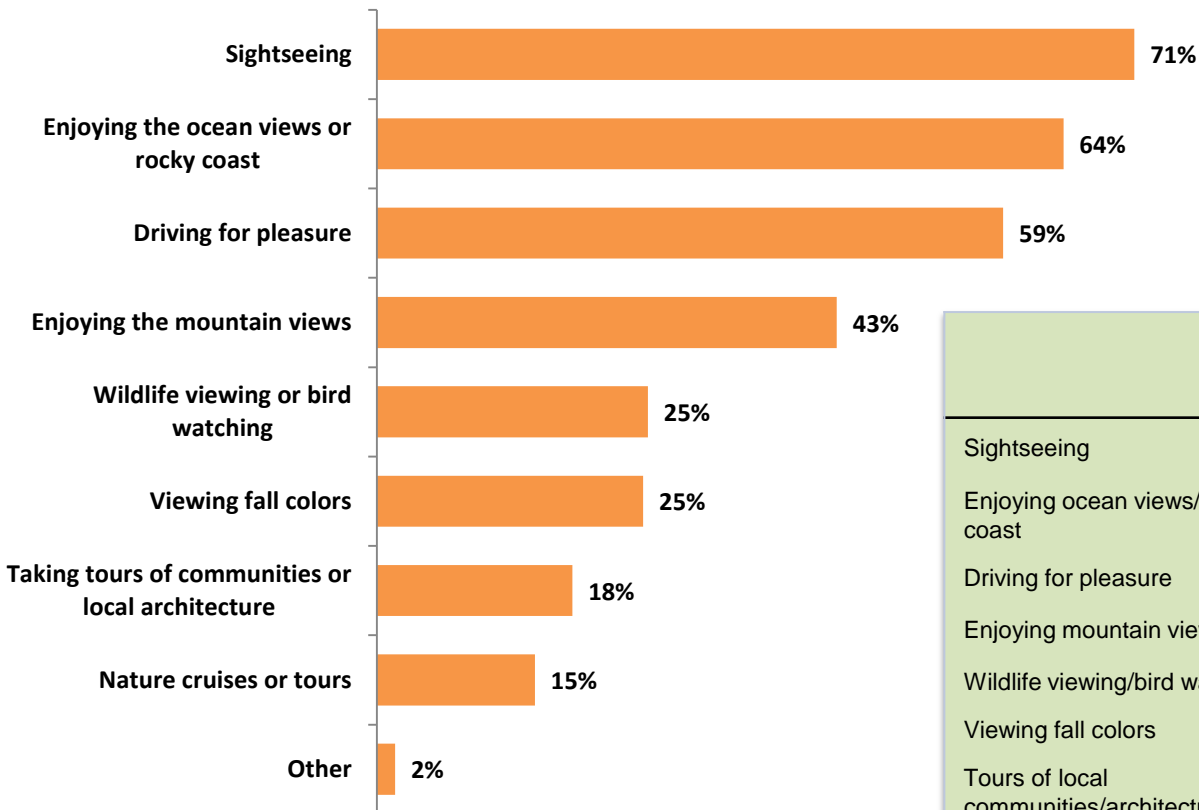
	First-Time (n=363) a	Repeat (n=1072) b	Kids (n=466) c	No Kids (n=968) d
Sightseeing	74%	70%	72%	70%
Enjoying ocean views/rocky coast	60%	66%	62%	66%
Driving for pleasure	52%	61%a	55%	60%
Enjoying mountain views	50%b	41%	53%d	38%
Wildlife viewing/bird watching	24%	26%	30%d	23%
Viewing fall colors	30%b	23%	29%	23%
Tours of local communities/architecture	21%	17%	22%d	17%
Nature cruises or tours	19%b	13%	21%d	12%

Q31. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- *Eating lobster or other local seafood* is especially popular during the Summer season, among domestic visitors, and among repeat visitors.

Food, Beverage, or Culinary Activities
(n=1711)

Activity	Percent
Ate lobster or other local seafood	61%
Consumed other locally produced Maine foods (i.e. blueberries, maple syrup, or apples)	45%
Enjoyed unique Maine food or beverages (i.e. whoopee pies or Moxie)	36%
Going to local brew pubs or craft breweries	35%
Visited Farmer's Markets	23%
Enjoyed high-end cuisine or five-star dining	20%
Enjoying local food at fairs or festivals	20%
Ate farm to table or organic cuisine	14%
Other	3%

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

Water Activities
(n=790)

Activity	%
Going to the beach	58%
Outdoor swimming (lake, ocean, river)	44%
Pool swimming (indoor or outdoor)	27%
Canoeing or kayaking	27%
Fishing (ocean, lake, stream, river, ice)	26%
Motor boating	14%
Sailing	11%
Water skiing or jet skiing	11%
White water rafting	9%
Surfing	6%
Other	2%

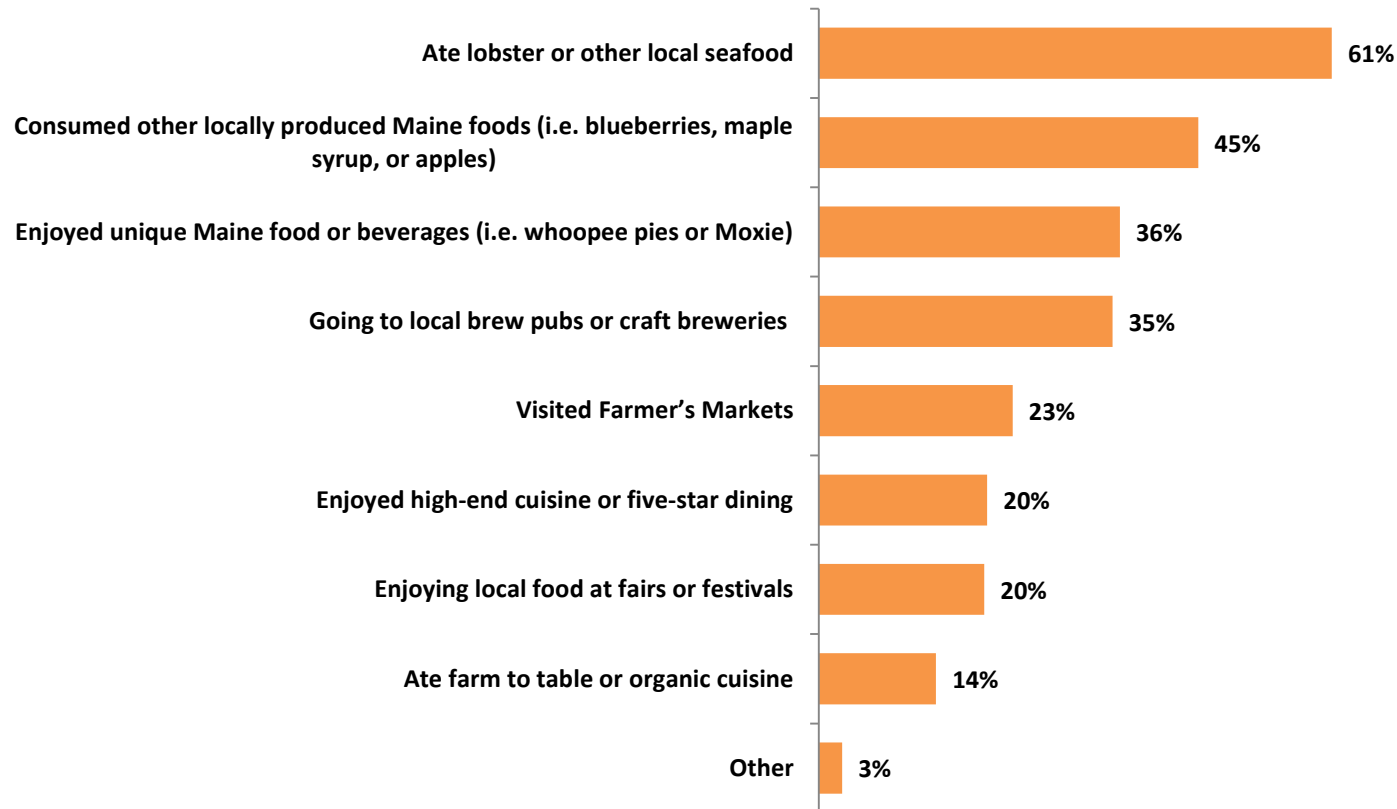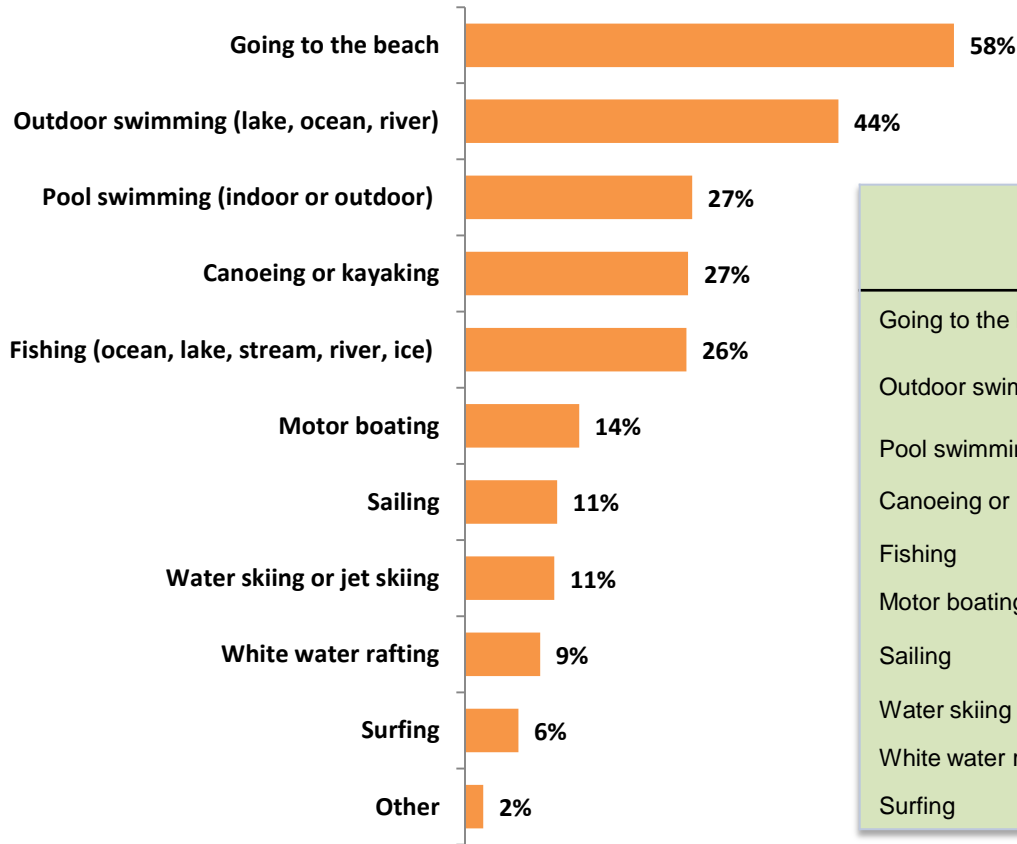|	First-Time (n=363) a	Repeat (n=1072) b	Kids (n=466) c	No Kids (n=968) d
Going to the beach	63%	57%	61%	55%
Outdoor swimming	38%	46%	49%	41%
Pool swimming	32%	26%	34%d	20%
Canoeing or kayaking	27%	27%	29%	25%
Fishing	31%	25%	34%d	20%
Motor boating	13%	14%	15%	12%
Sailing	16%	10%	10%	12%
Water skiing or jet skiing	17%b	9%	11%	11%
White water rafting	14%	8%	10%	8%
Surfing	15%b	4%	10%d	3%

Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- Not surprisingly, seasonal preferences are evident for the various outdoor activities, as shown in the table below.

Active Outdoor Activities – Non-Water (n=941)

Activity	Percent
Hiking, climbing, or backpacking	52%
Exploring State and National Parks	39%
Bicycling or mountain biking	19%
Camping	18%
Riding all-terrain vehicles	8%
Alpine skiing or snowboarding	7%
Nordic skiing	5%
Hunting (game or bird)	5%
Snowmobiling	4%
Snowshoeing	4%
Other	9%

	Winter (n=147) a	Summer (n=504) b	Fall (n=290) c
Hiking, climbing, or backpacking	42%	55%a	52%a
Exploring State and National Parks	32%	41%a	41%
Bicycling or mountain biking	12%	21%a	21%a
Camping	14%	19%	18%
Riding all-terrain vehicles	7%	8%	8%
Alpine skiing or snowboarding	20%bc	4%	6%
Nordic skiing	7%b	3%	9%b
Hunting (game or bird)	4%	5%	4%
Snowmobiling	8%b	2%	5%
Snowshoeing	8%b	2%	5%

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

History or Culture Activities
(n=831)

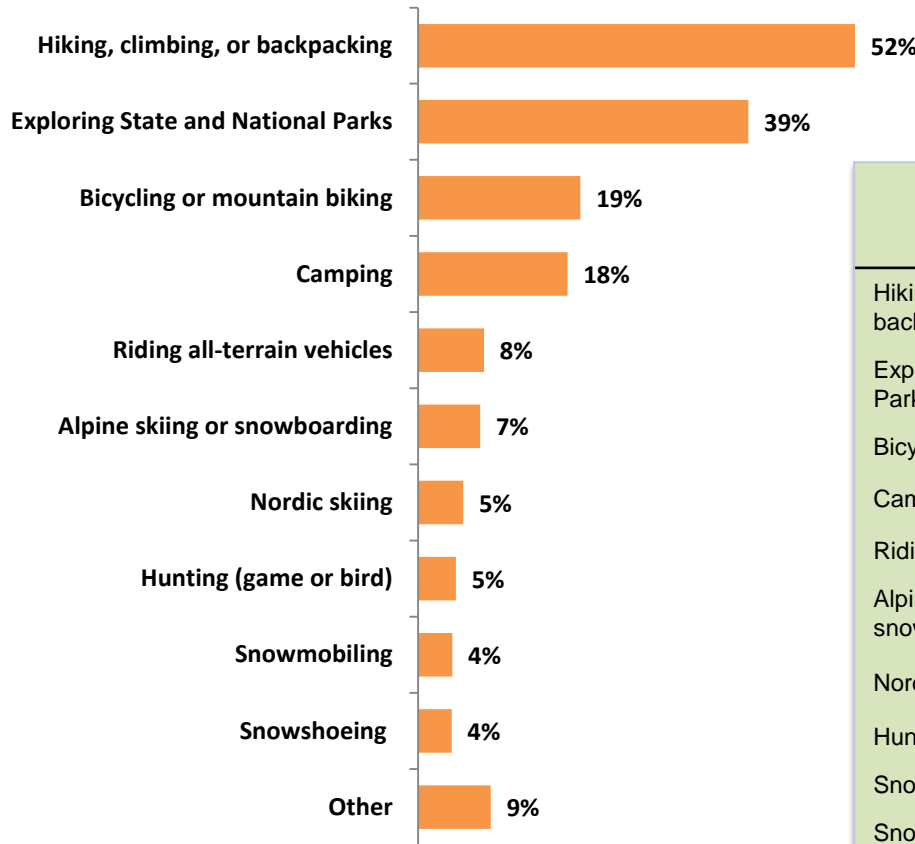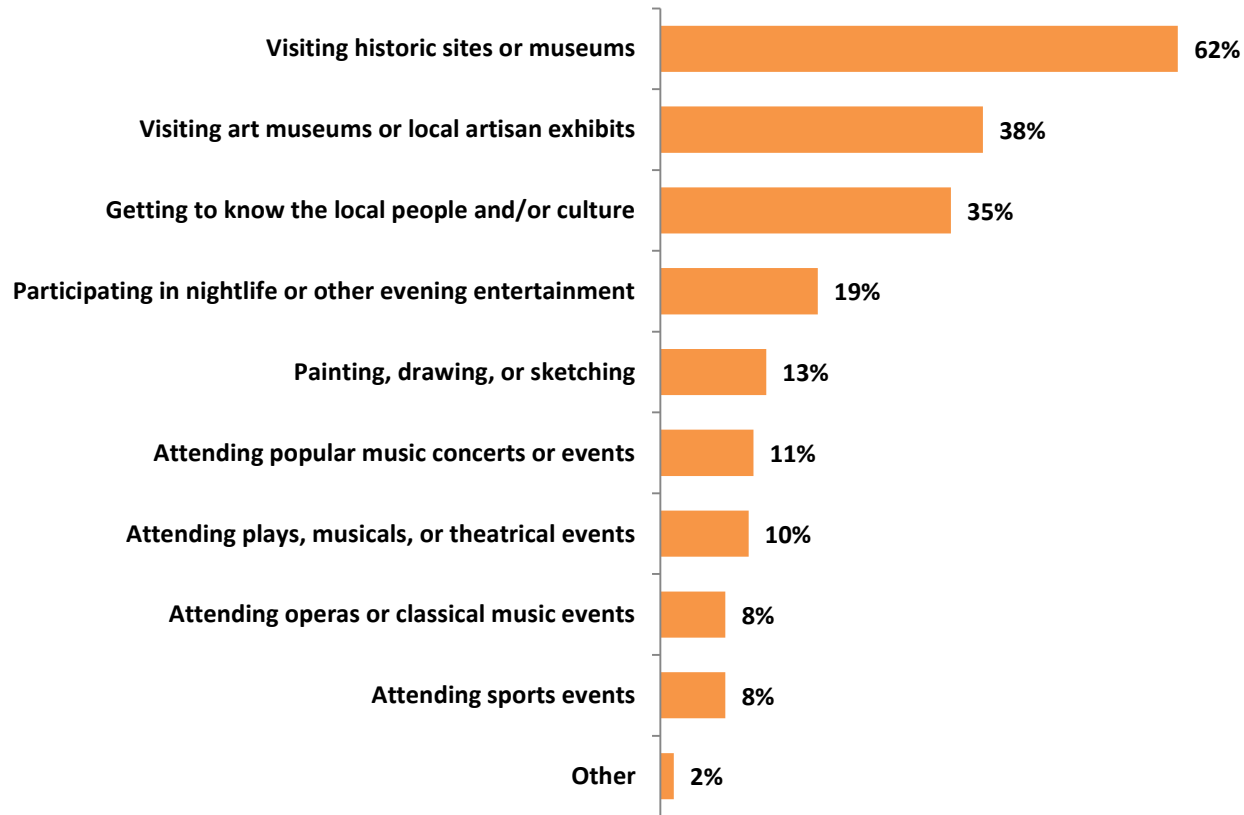| Activity	Percentage
Visiting historic sites or museums	62%
Visiting art museums or local artisan exhibits	38%
Getting to know the local people and/or culture	35%
Participating in nightlife or other evening entertainment	19%
Painting, drawing, or sketching	13%
Attending popular music concerts or events	11%
Attending plays, musicals, or theatrical events	10%
Attending operas or classical music events	8%
Attending sports events	8%
Other	2%

Q31. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

59

Majority of overnight visitors interested in shopping engage in *outlet shopping* while in Maine.

- While Canadian visitors are more likely to do some *general shopping at malls or downtown*, domestic visitors are more likely to mention shopping for *unique locally produced goods, antiques and local arts/crafts,* and *products with the "Made in Maine" identifier*.

Shopping Activities
(n=1505)

	US Visitor (n=1190) a	Canadian Visitor (n=314) b
Outlet shopping	55%	54%
General shopping at malls, downtown	34%	63%a
Shopping for gifts or souvenirs	37%	37%
Shopping for unique, locally produced goods	33%b	22%
Shopping for antiques, local arts and crafts	25%b	18%
Shopping for products with the "Made in Maine" identifier	23%b	13%

Q31. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Outdoor fun centers most popular activity for visitors interested in family fun/children's activities.

Family Fun/Children's Activities
(n=772)

Activity	Percentage
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	35%
Amusement or theme parks	25%
Animal parks or zoos	24%
Children's museums	23%
Water parks	22%
Agricultural fairs	12%
Horseback riding	11%
Summer camps	8%
Spectator sports	8%
Other	13%
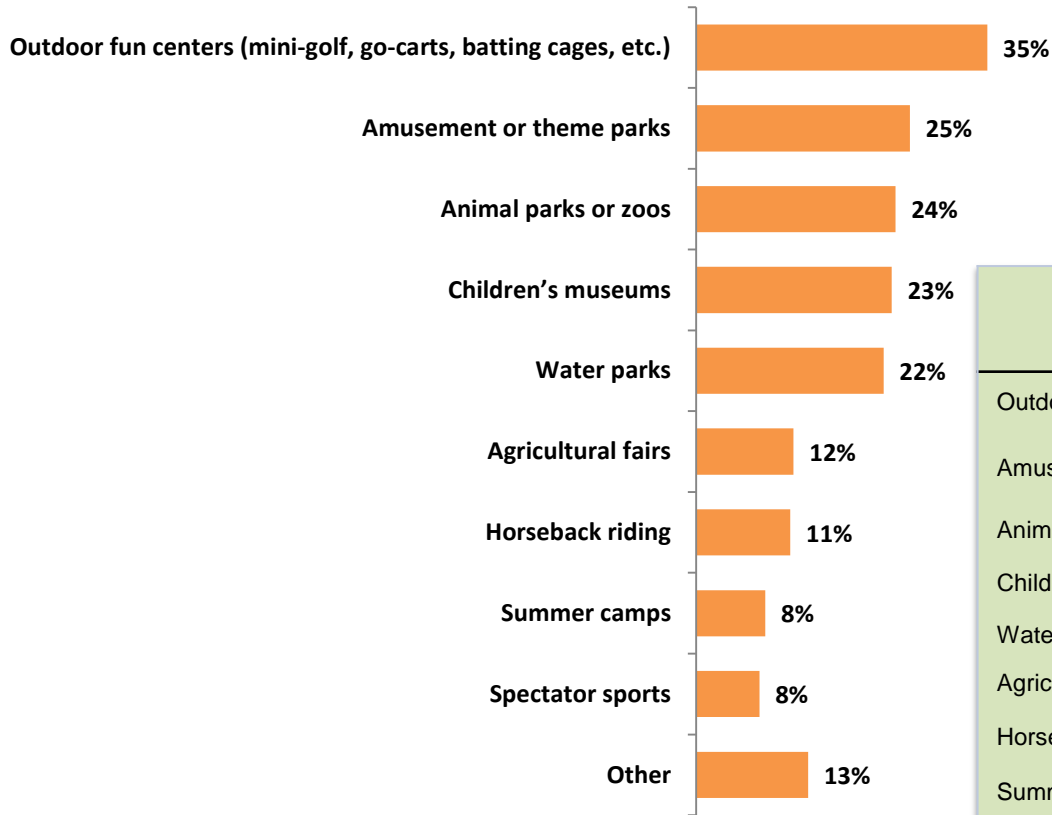
	First-Time (n=363) a	Repeat (n=1072) b	Kids (n=466) C	No Kids (n=968) d
Outdoor fun centers	32%	35%	38%d	27%
Amusement or theme parks	32%	24%	28%d	18%
Animal parks or zoos	32%b	21%	27%d	15%
Children's museums	34%b	20%	30%d	7%
Water parks	25%	22%	26%d	14%
Agricultural fairs	16%	10%	12%	10%
Horseback riding	18%b	9%	11%	11%
Summer camps	11%	8%	8%	8%
Spectator sports	11%	6%	7%	9%

Q31. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- More than half of overnight visitors report that Maine either *far exceeded their expectations* or was *somewhat above their expectations* in a number of categories, several related to Maine's people.

Maine Far Exceeded/Somewhat Above My Expectations*
(n=2930)

Top 2 Box ▬ Mean Rating 2014

Category	Mean Rating 2014	Top 2 Box
Overall experience	3.93	63%
Friendliness of people	3.85	58%
Overall quality of customer service	3.76	54%
Welcoming locals who make visitors feel comfortable	3.77	53%
Quality of dining	3.74	53%
Distinctive, genuine, and unique experiences	3.75	51%
Authentic communities with their own individual personalities	3.72	49%
Variety of activities available	3.68	49%
Overall value for the money	3.65	49%
Quality of lodging	3.68	48%
Accessible, diverse, and abundant shopping choices	3.63	46%
Availability of family dining	3.67	45%
Availability of lodging	3.63	44%
Great selection of family attractions and venues	3.65	43%
Availability of fine dining	3.60	43%

Q35. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
*The wording and rating scale used in this question was revised for the 2014 questionnaire; therefore, no comparisons can be made to prior years.

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Maine more likely to exceed visitor expectations on several attributes for first-time visitors than for repeat visitors.

- These attributes may point to areas where non-visitors have less desirable perceptions of Maine – perceptions that are changed once they experience a vacation in the State.

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

■ First-Time Visitor (n=553) a   ■ Repeat Visitor (n=2377) b

Attribute	First-Time Visitor	Repeat Visitor
Overall experience	64%	62%
Friendliness of people	62%	57%
Overall quality of customer service	57%	53%
Welcoming locals who make visitors feel comfortable	56%	52%
Quality of dining	57%	52%
Distinctive, genuine, and unique experiences	55%	51%
Authentic communities with their own individual personalities	53%	48%
Variety of activities available	55%b	47%
Overall value for the money	52%	48%
Quality of lodging	53%b	47%
Availability of family dining	48%	44%
Accessible, diverse, and abundant shopping choices	51%b	45%
Great selection of family attractions and venues	49%b	42%
Availability of fine dining	51%b	41%
Availability of lodging	51%b	42%

Q35. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
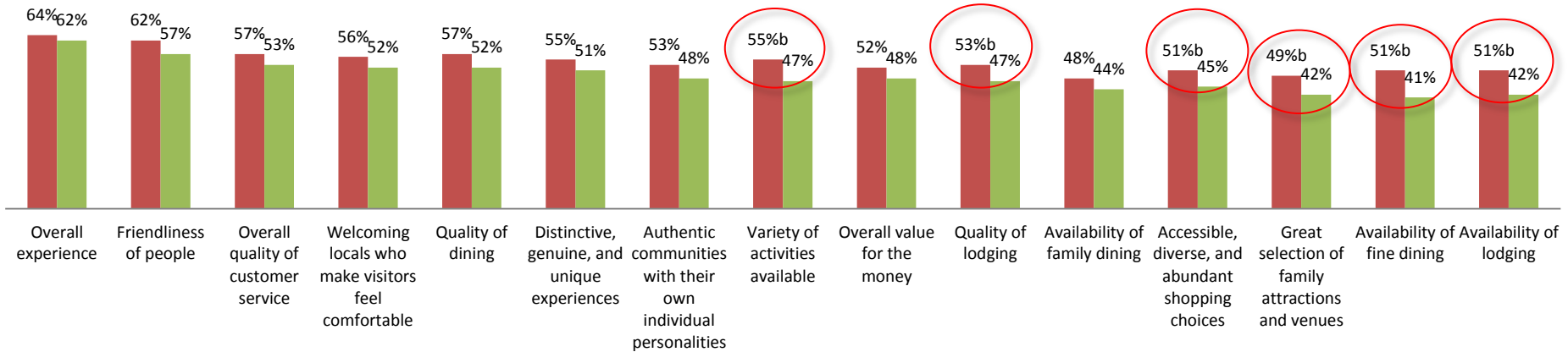a, b, c indicates significant difference at the 95% confidence level
*The wording and rating scale used in this question was revised for the 2014 questionnaire; therefore, no comparisons can be made to prior years.

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"Natural" and "Friendly" among top words chosen to describe Maine's personality.

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

Top Attributes of Maine
(n=2930)

Attribute	%
Natural	60%
Friendly	56%
Fun	44%
Authentic	42%
Genuine	42%
Family-oriented	40%
Adventurous	37%
Real	35%
Unique	30%
Active	29%
Inspiring	27%
Original	27%
Sincere	26%
Old-fashioned	25%
Vibrant	22%
Creative	19%
Open-minded	17%
Passionate	15%
Enthusiastic	15%

Other Attributes	
Imaginative	13%
Quirky	12%
Dynamic	11%
Offbeat	8%
Unexpected	7%
Reserved	6%
Unconventional	6%
Unusual	5%
Uninspiring	1%
Boring	1%
Stodgy	1%
Unpleasant	<1%
Fake	<1%
Other	2%

Q41. If Maine were a person, which of the following words would you choose to describe its personality?
*New question added in 2014; therefore, no comparisons can be made to prior years.

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Day Visitor Travel Logistics

Day visitors travel to Maine in groups of two to three, slightly more than 2013.

- Like overnight visitors to Maine, a higher proportion of day visitors traveled with children in 2014 as compared to 2013 (28% versus 22%).

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

Travel Party Size and Composition

■ Percent Traveling with Children 2013   ■ Percent Traveling with Children 2014
Average Number of People in Party 2013   Average Number of People in Party 2014

% Traveling with Children 2014		
Winter (n=220) a	Summer (n=1235) b	Fall (n=279) c
22%	28%a	31%a

2014 NET (n=1733)	Leisure (n=790) a	VFR (n=695) b	Business (n=249) c
2.5 / 2.7	2.6 / 2.8	2.5 / 2.7	2.1 / 2.5
22% → 28%	21% → 27%	26% → 31%	14% → 23%
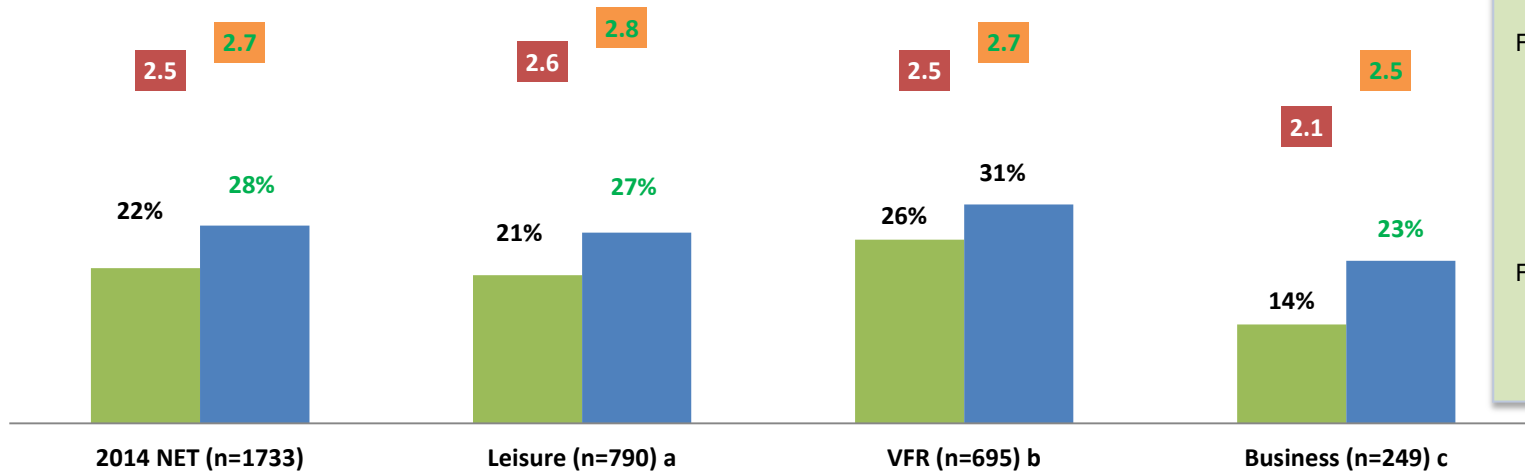
Average Travel Party Size 2014	
First-Time Visitor (n=95)	Repeat Visitor (n=1638)
<3.4>	2.7
% Traveling with Children	
First-Time Visitor (n=95)	Repeat Visitor (n=1638)
<45%>	27%

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2014 displays second year of increases in proportion of day visitors traveling with children, following consistent decreases from 2008 to 2012.

Travel Party Size and Composition

■ Percent Traveling with Children   ●—● Average Number of People in Travel Party

	2008	2009	2010	2011	2012	2013	2014
Average Number of People	2.8	2.5	2.5	2.5	2.4	2.5	2.7
Percent Traveling with Children	37%	26%	26%	22%	17%	22%	28%

Q14. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
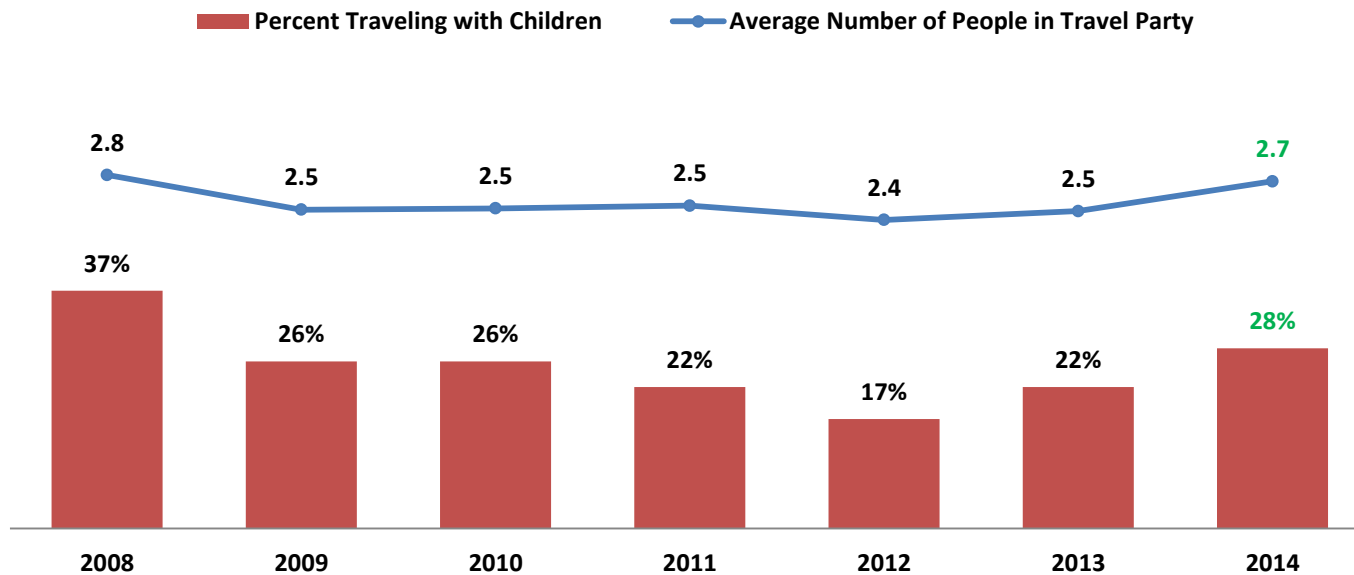Q15. How many of these people were: Children?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Nearly two-thirds of day visitors continue Maine research once arriving, a sizable increase over 2013.

- 2014 showed large increases in the proportion of overnight visitors that used their *mobile device* to research the local area while in Maine (45% versus 29% in 2013), and their *laptop* (24% versus 8% in 2013). Business travelers were more likely than leisure or VFR travelers to research Maine while visiting.

- 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, other Maine websites, Yelp, or Open Table.

Trip Research While in Maine

Any Research (NET)
- 62%
- 61%
- 59%
- 75%ab

A mobile device (such as a smartphone or tablet)
- 45%
- 44%
- 43%
- 55%ab

A laptop
- 24%
- 19%
- 25%a
- 39%ab

Materials from my hotel, campground, etc.
- 16%
- 17%
- 14%
- 20%

Other
- 4%
- 4%
- 3%
- 3%

Legend:
- 2014 NET (n=1733)
- Leisure (n=790) a
- VFR (n=695) b
- Business (n=249) c

First time visitors, visitors traveling **with children**, visitors **younger than 55**, and those traveling during the **Fall season** are all more likely than their counterparts to continue researching Maine while visiting the State.

1st time	Repeat
<89%>	61%

Fall Season	Winter or Summer Seasons
<68%>	61%

Kids on Trip	No Kids
<69%>	60%

18-54	55+
<70%>	49%

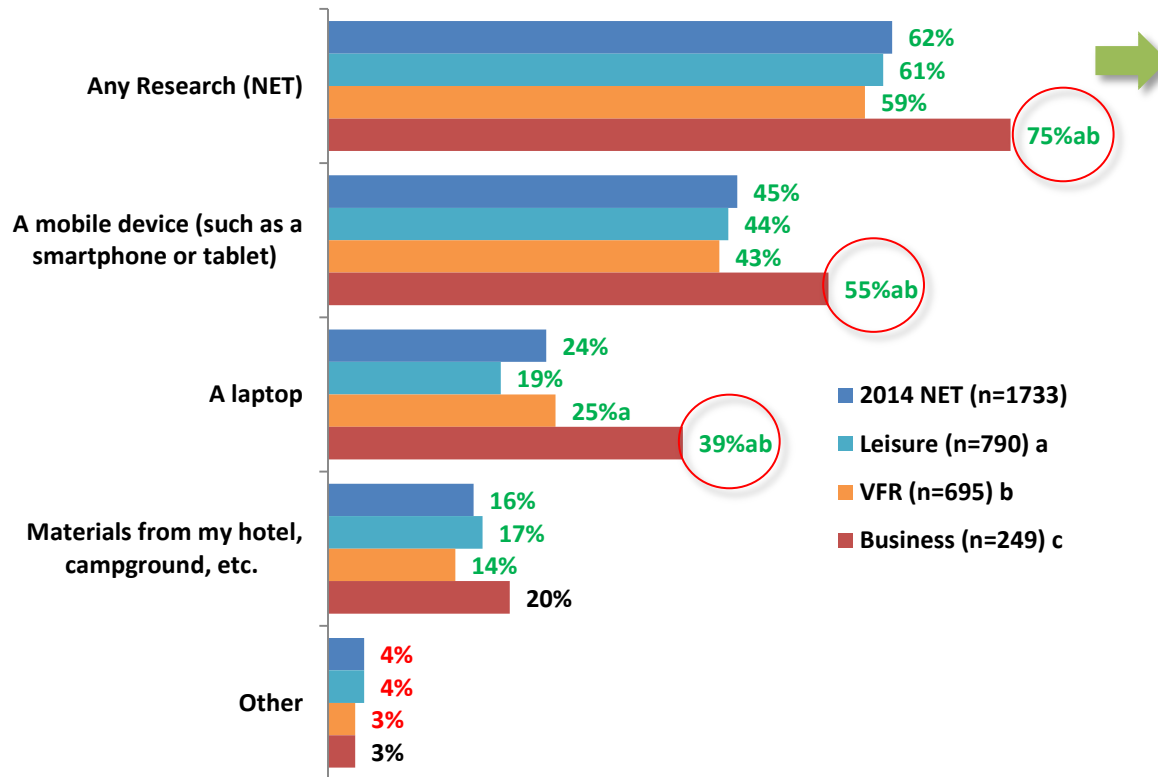Q24. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year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

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Continued evidence of strong visitor loyalty, with 95% of day visitors repeat visitors.

- 2014 showed a slight increase in the proportion of first-time leisure day visitors (7% versus 4% in 2013).

- Canadian day visitors are more likely than domestic day visitors to be visiting Maine for the first time (11% versus 5%). Among Canadian day visitors, those arriving from Quebec are more likely to be first-time visitors than are those arriving from the Maritime Provinces (26% versus 2%).

Repeat vs. First Time Visitors
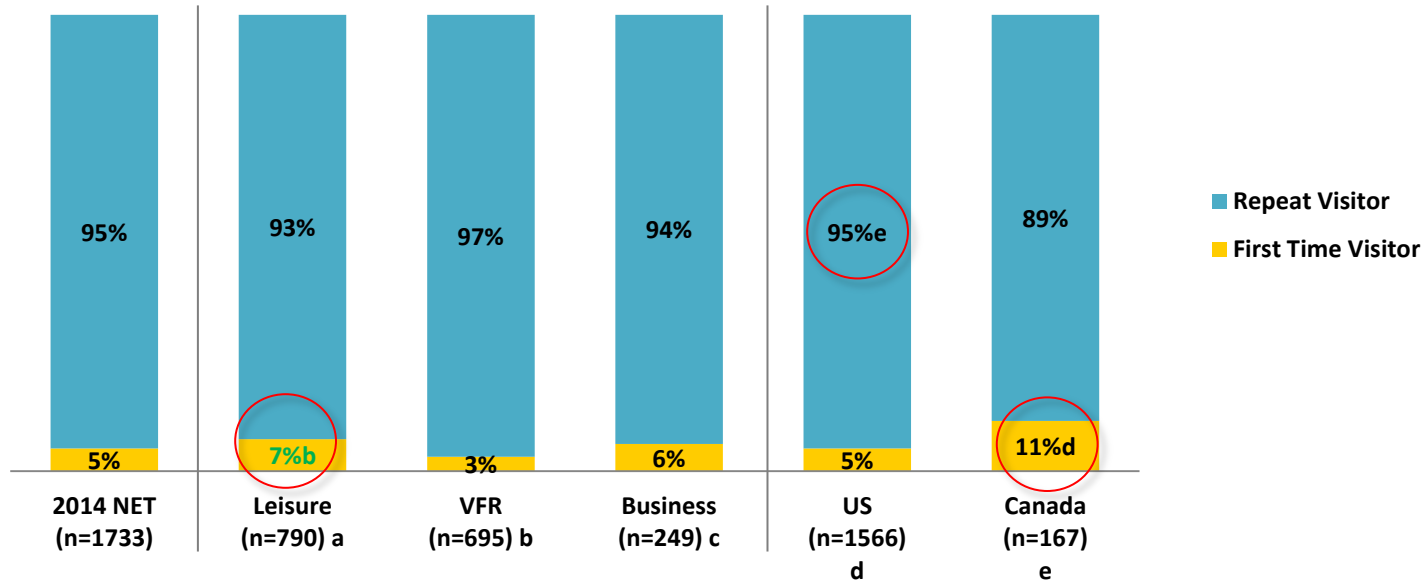
	2014 NET (n=1733)	Leisure (n=790) a	VFR (n=695) b	Business (n=249) c	US (n=1566) d	Canada (n=167) e
Repeat Visitor	95%	93%	97%	94%	95%e	89%
First Time Visitor	5%	7%b	3%	6%	5%	11%d

Q10. Was this your first trip to Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Summer and Fall seasons more likely to attract first-time day visitors than Winter season.

Younger visitors, those with **lower annual household incomes**, and those **traveling with children** are all more likely to be first-time visitors.

< 55 yrs (n=1081)	55+ yrs (n=653)
<8%>	1%
< $150k (n=1490)	$150k + (n=242)
<6%>	2%
Kids on Trip (n=483)	No Kids on Trip (n=1251)
<9%>	4%

Repeat vs. First Time Visitors

95% — 5%
2014 NET (n=1733)

97%bc — 3%
Winter (n=220) a

94% — 6%a
Summer (n=1235) b

94% — 6%a
Fall (n=279) c

- Repeat Visitor
- First Time Visitor

Q10. Was this your first trip to Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Relative proportion of first-time and repeat day visitors stable over past six years.

Repeat vs. First Time Visitors Trend 2009-2014

	2009	2010	2011	2012	2013	2014
Repeat Visit	95%	96%	95%	94%	96%	95%
First Time	5%	4%	5%	6%	4%	5%

Q10. Was this your first trip to Maine?
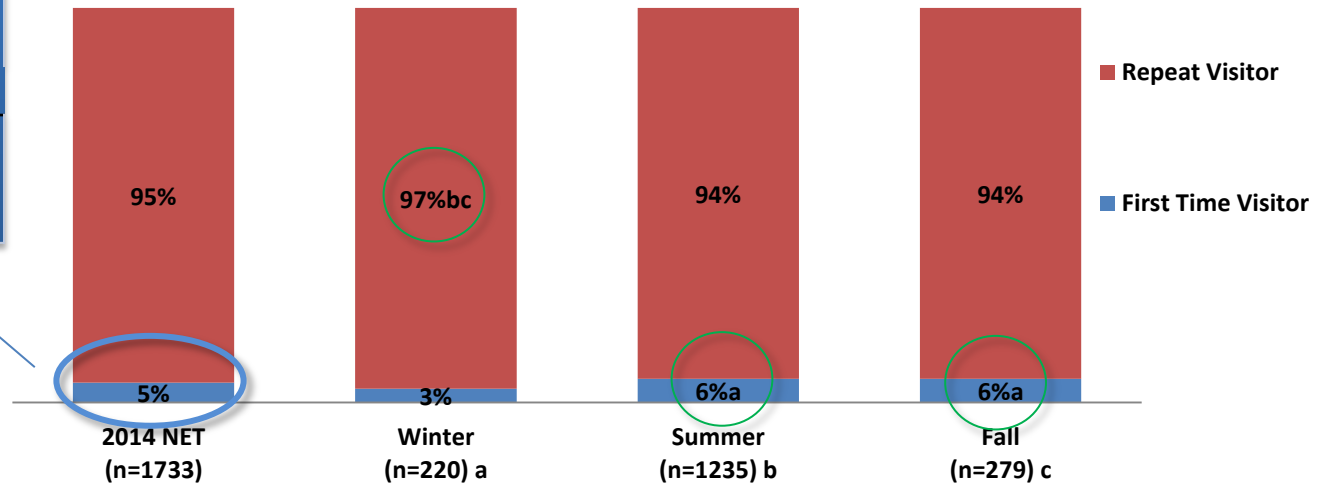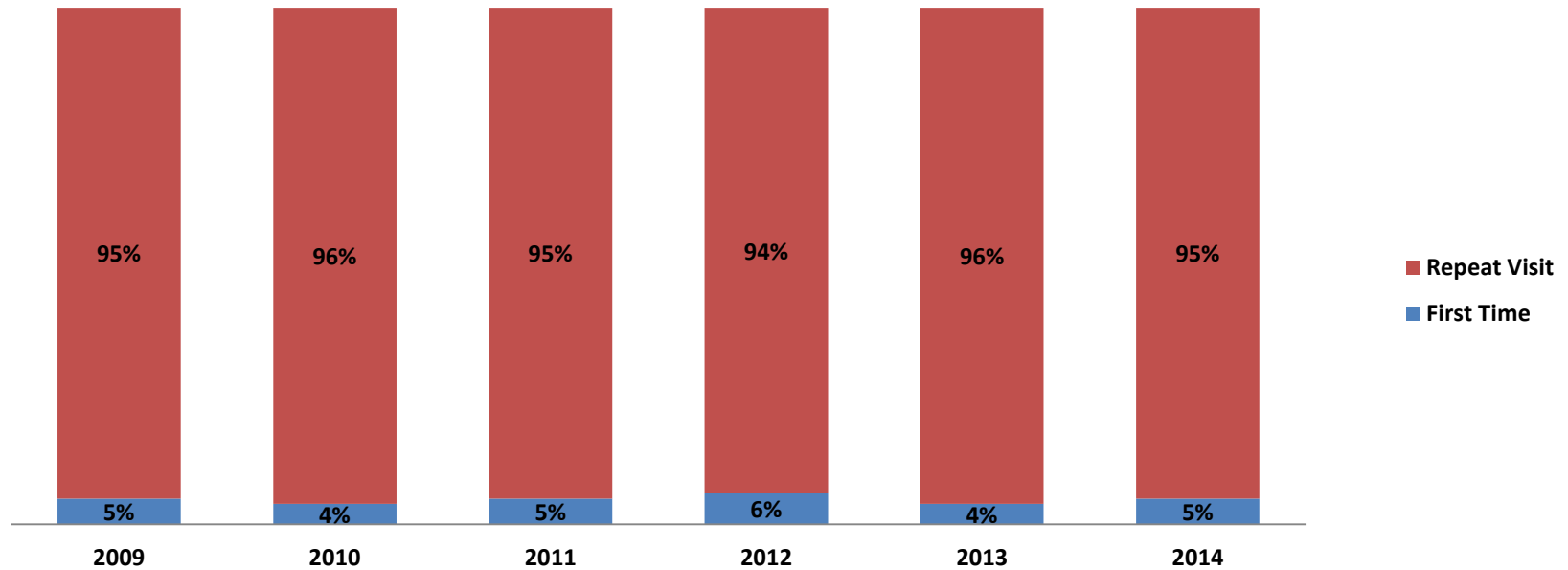<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- 2014 showed a drop in the proportion of in-state day visitors and a slight increase in the proportion arriving from Quebec.

State/ Province of Residence

■ 2014 NET (n=1733)

State/Province	2014 NET
U.S. NET	90%
Massachusetts	43%
Maine	29%
New Hampshire	15%
Rhode Island	2%
Vermont	1%
Canada NET	10%
New Brunswick	6%
Quebec	3%
Nova Scotia	<1%

	NET 2014 (n=1733)	First-Time Visitor (n=95) [a]	Repeat Visitor (n=1638) [b]
U.S. NET	90%	81%	91%a
Massachusetts	43%	53%	42%
Maine	29%	13%	30%a
New Hampshire	15%	5%	16%a
Rhode Island	2%	6%	2%
Vermont	1%	3%	1%
Canada NET	10%	19%b	9%
New Brunswick	6%	1%	6%a
Quebec	3%	17%b	3%
Nova Scotia	<1%	2%	<1%

Q2. In which state or province do you live?
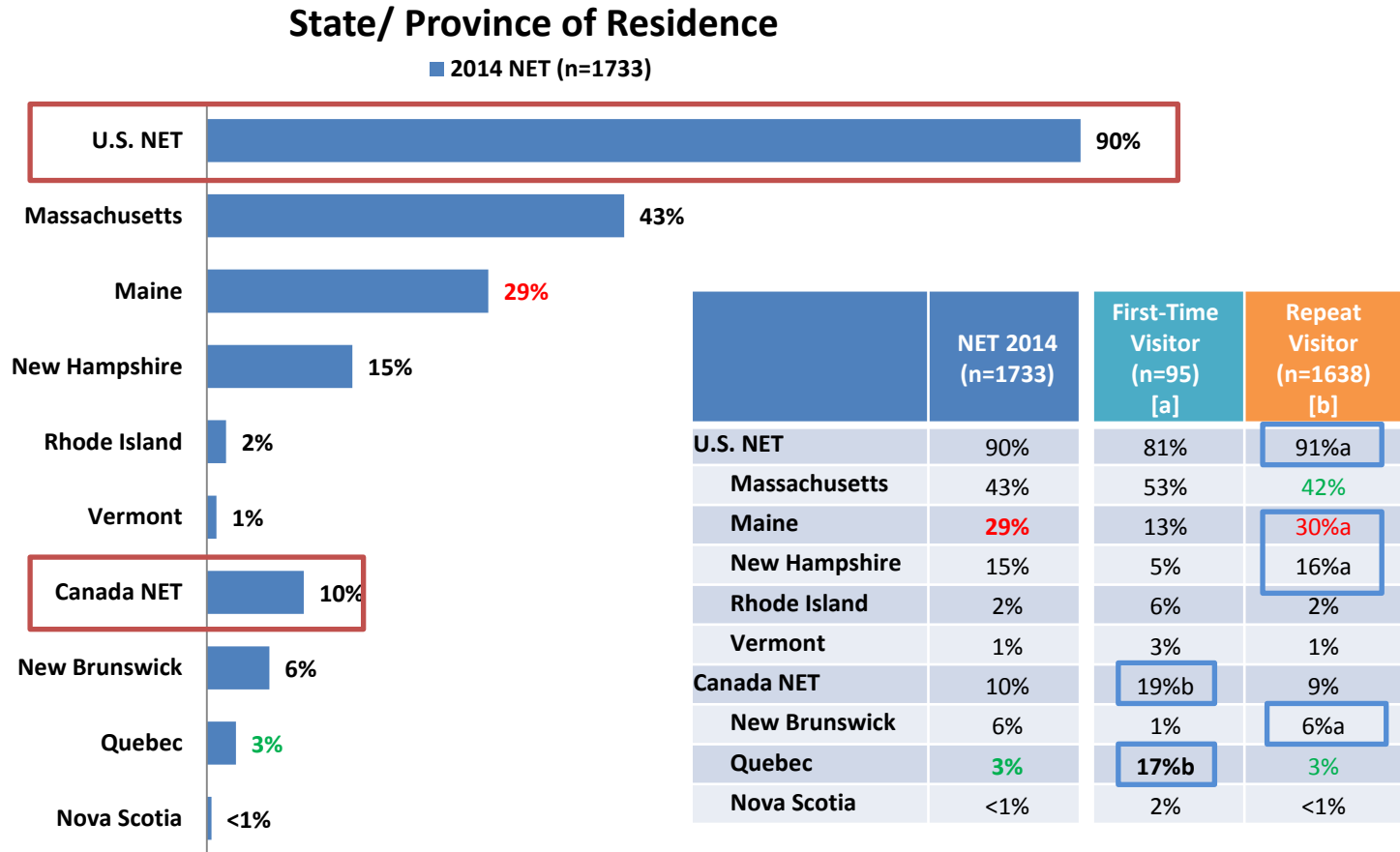<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day visitor origin exhibits differences by trip type and season of visit.

- Leisure visitors are most likely to come from Massachusetts, while business travelers are most likely to be in-state visitors.

- In-state day visitors are more prevalent during the Winter and Summer months, while day visitors from Vermont are most likely to visit during the Fall months.

	NET 2014 (n=1733)	Leisure (n=790) [a]	VFR (n=695) [b]	Business (n=249) [c]	Winter (n=220) [d]	Summer (n=1235) [e]	Fall (n=279) [f]
U.S. NET	90%	87%	95%ac	89%	89%	91%	89%
Massachusetts	43%	51%bc	39%c	26%	40%	43%	45%
Maine	29%	16%	35%a	54%ab	34%f	29%f	23%
New Hampshire	15%	17%c	16%c	8%	14%	16%	14%
Rhode Island	2%	2%	4%ac	1%	1%	2%d	4%d
Vermont	1%	1%	1%	-	<1%	1%	2%de
Canada NET	10%	13%b	5%	11%b	11%	9%	11%
New Brunswick	6%	7%b	4%	5%	7%	5%	7%
Quebec	3%	5%b	1%	5%b	3%	4%	3%
Nova Scotia	<1%	1%	<1%	1%	1%	<1%	1%

Q2. In which state or province do you live?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Originally seen in 2013, shift between proportion of in-state day visitors and those from Massachusetts more pronounced in 2014.

Residence of Maine Day Visitors

Legend: ME, MA, NH, NB, QC, VT, RI, NS

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The Maine Day Visitor Experience

Day visitation centered mostly around Maine Beaches region in 2014.

- As seen in the table below, US and Canadian day visitors differ in the primary regions they choose to visit in Maine.

Primary Region of Visit

Region	2014 NET (n=1733)
Maine Beaches [Southern Maine Coast]	35%
Greater Portland & Casco Bay	14%
Downeast & Acadia	12%
Mid-Coast	10%
Maine Lakes & Mountains	9%
The Maine Highlands	8%
Kennebec & Moose River Valley	6%
Aroostook County	4%

	US (n=1566) [a]	Canada (n=167) [b]
Maine Beaches	37%b	23%
Greater Portland	14%b	8%
Downeast/Acadia	11%	20%a
Mid-Coast	11%b	5%
Lakes & Mtns	9%b	4%
Highlands	7%	18%a
Kennebec & Moose River	7%	4%
Aroostook	2%	17%a

Q20. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Visitor origin influences primary region visited.

- Residents of New England are the most likely to visit the Maine Beaches region, when compared to residents of Maine and Canada. Conversely, residents of New England are *less* likely to have visited the Downeast & Acadia region.

- In-state day visitors are more likely than other New England residents and Canadians to visit the Mid-Coast region.

Region by Residence

Chart: Region by Residence, with bars for 2014 NET (n=1733), Maine (n=499) a, New England (n=1068) b, and Canada (n=167) c.

Region	2014 NET	Maine a	New England b	Canada c
Maine Beaches	35%	10%	49%ac	23%a
Greater Portland & Casco Bay	14%	15%c	14%c	8%
Downeast & Acadia	12%	19%b	7%	20%b
Mid-Coast	10%	16%bc	8%	5%
Maine Lakes & Mountains	9%	10%c	9%c	4%
The Maine Highlands	8%	14%b	4%	18%b
Kennebec & Moose River Valley	6%	9%c	6%	4%
Aroostook County	4%	4%b	1%	17%ab

Q20. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
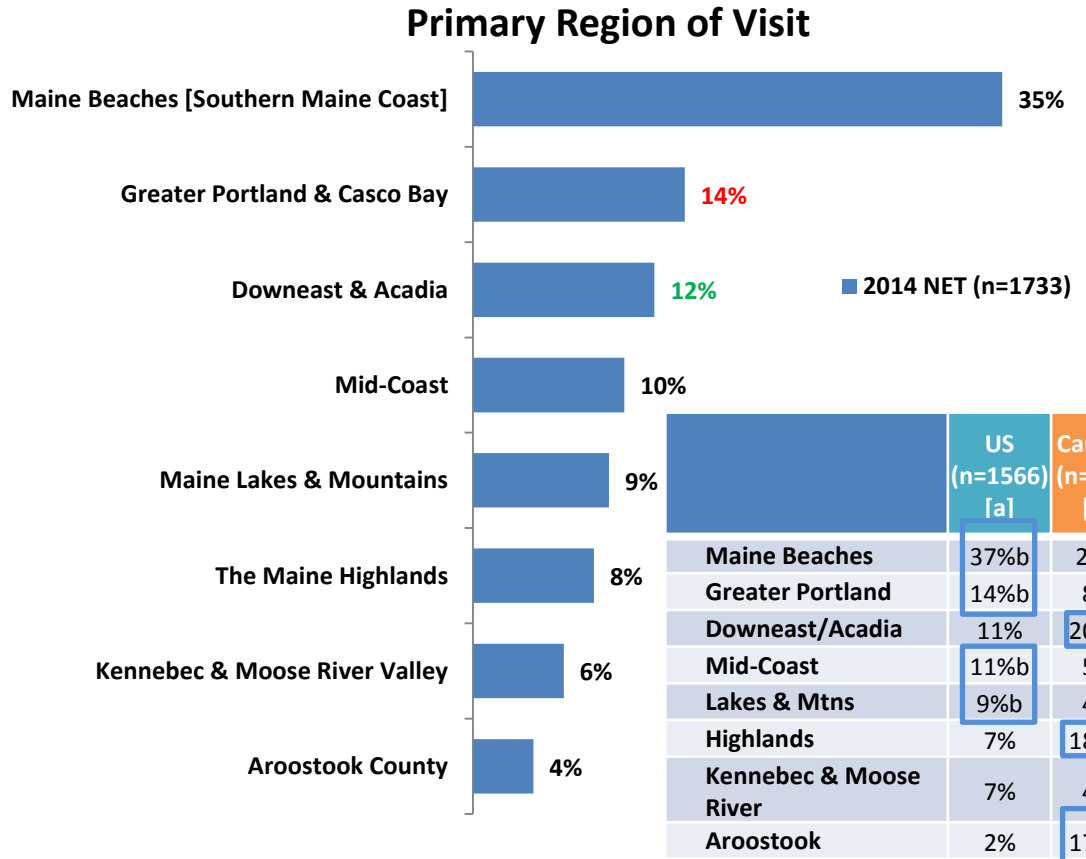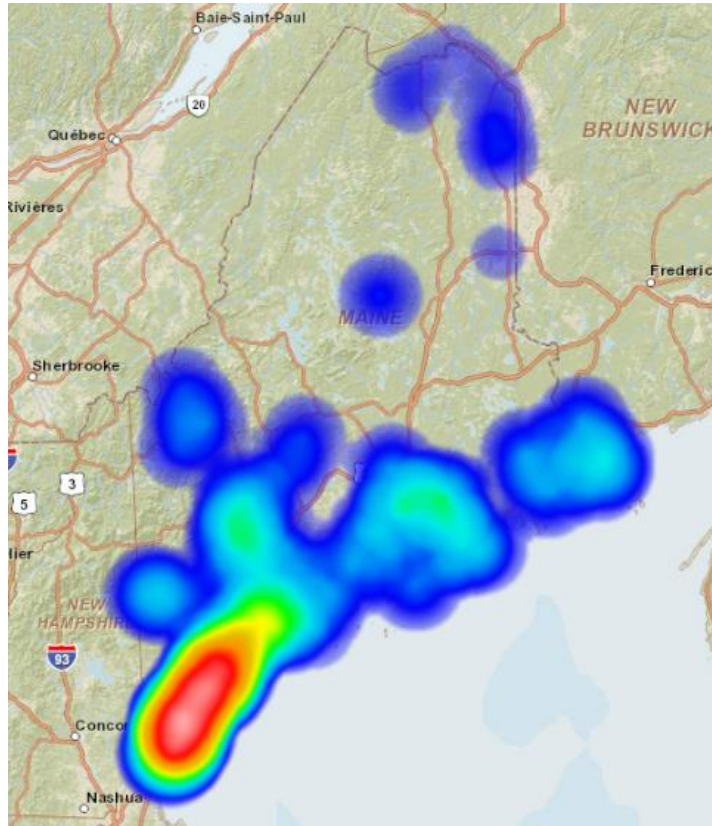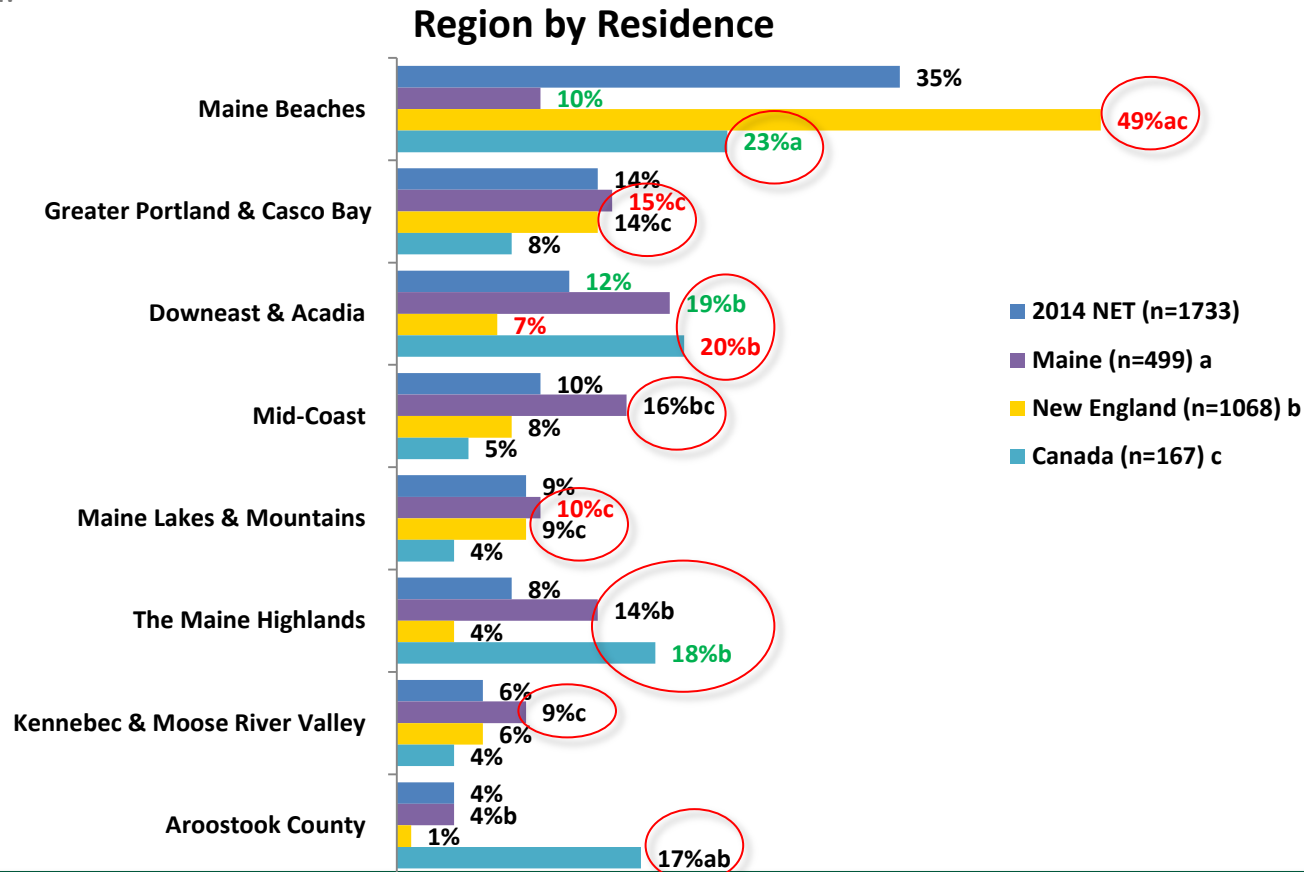Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day visitors show overwhelming intent to recommend Maine region visited to friends/relatives.

Likelihood to Recommend Region to Friends/Relatives

■ **Top 2 Box:**
Definitely/probably will recommend

Region	Value
Downeast & Acadia [a] (n=207)	98% g
Mid-Coast [b] (n=181)	97% g
Maine Beaches [Southern Maine Coast] [c] (n=613)	97% g
Greater Portland & Casco Bay [d] (n=240)	96%
Kennebec & Moose River Valley [e] (n=111)	95%
The Maine Highlands [f] (n=144)	92%
Maine Lakes and Mountains [g] (n=149)	91%
Aroostook County [h] (n=61)	90%
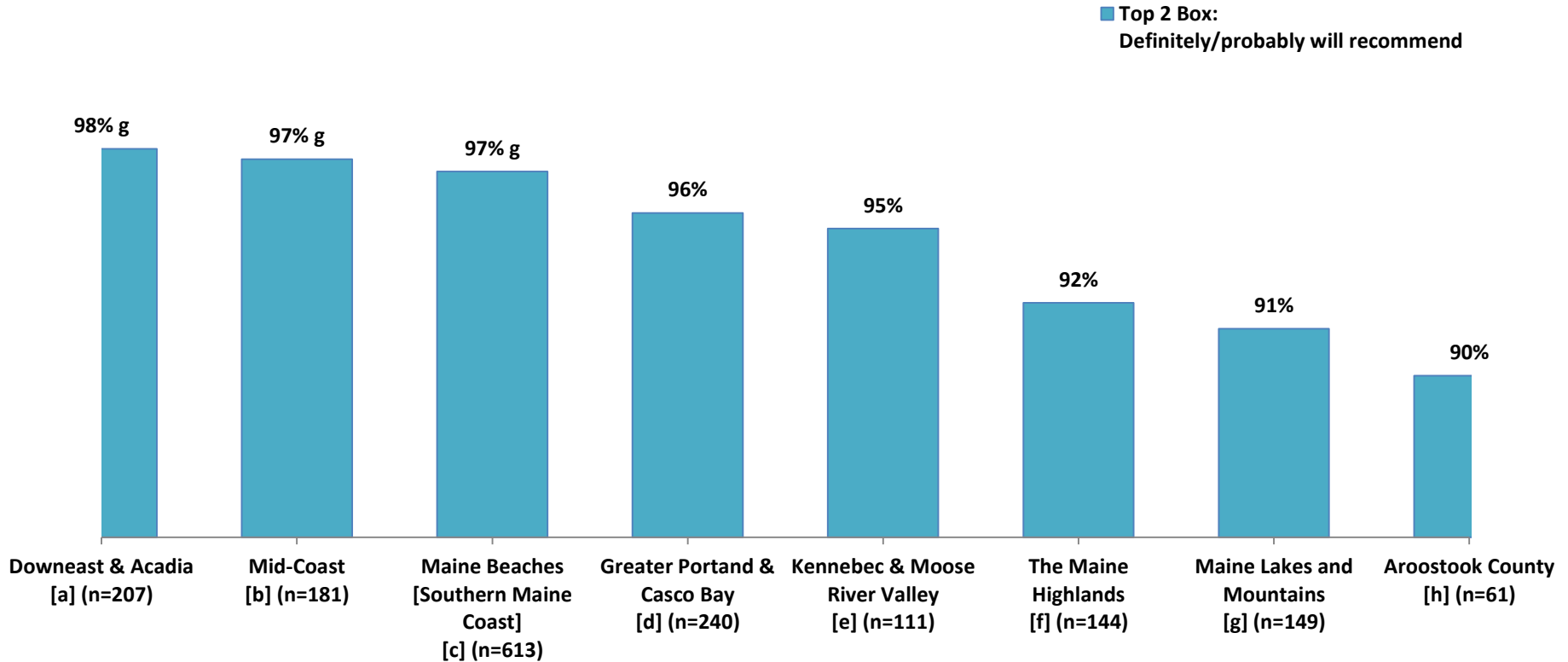
Q21. How likely will you be to recommend the [primary region visited] to friends or relatives?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Primary Purpose of Day VFR Trips

■ VFR (n=695)

Purpose	
General visit to see friends or relatives	75%
Family reunion	7%
Holiday visit	6%
Wedding	4%
Funeral	2%
Class reunion	1%
Other	5%
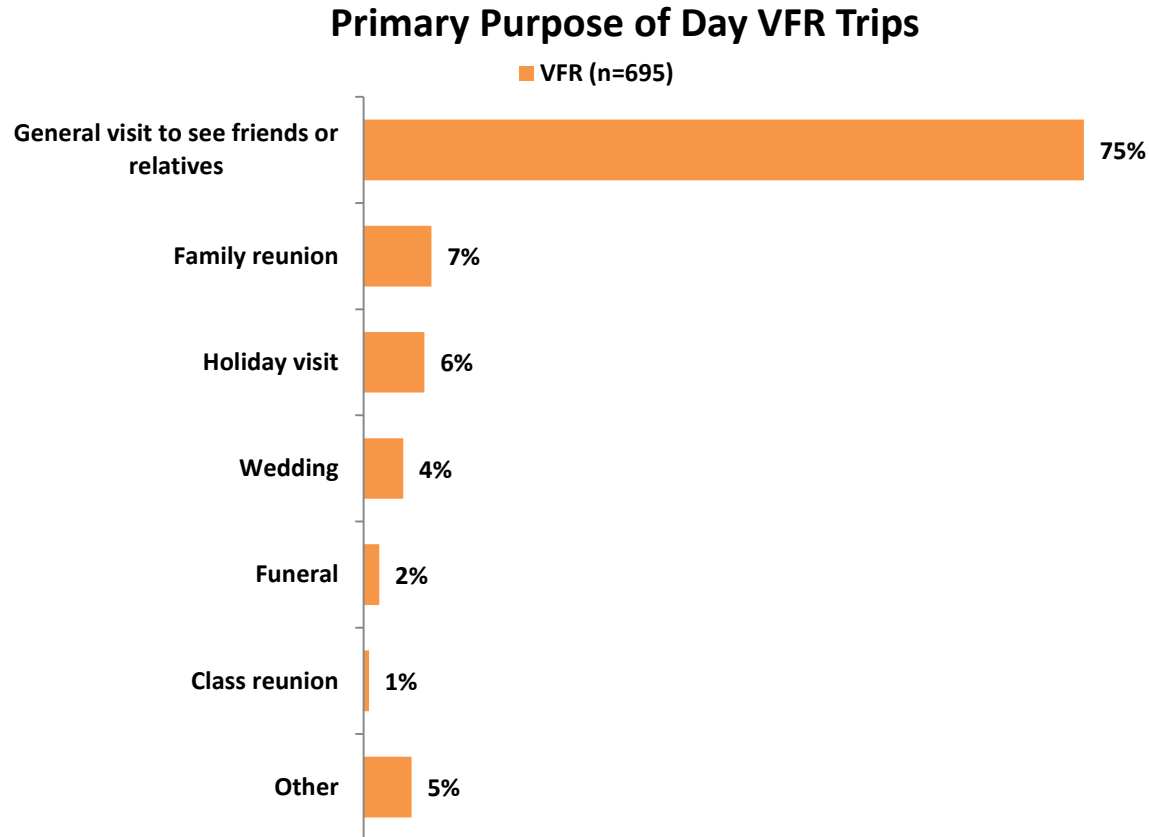
Q9. What was the primary purpose of your most recent day trip visit to friends or relatives in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General meetings primary draw for business day travel to Maine.

- Similar to overnight business travelers, day business travelers in Maine for the first time are more likely than repeat visitors to be visiting for a *convention/conference/trade show* (43% versus 12% among repeat visitors), once again illustrating the importance of convention/conference business in introducing Maine to potential future visitors.

Primary Purpose of Day Business Trips

■ Business (n=249)

Category	Percentage
Meeting	39%
Training or Professional Development	19%
Sales or Service	17%
Convention, Conference, or Trade Show	13%
Other	12%
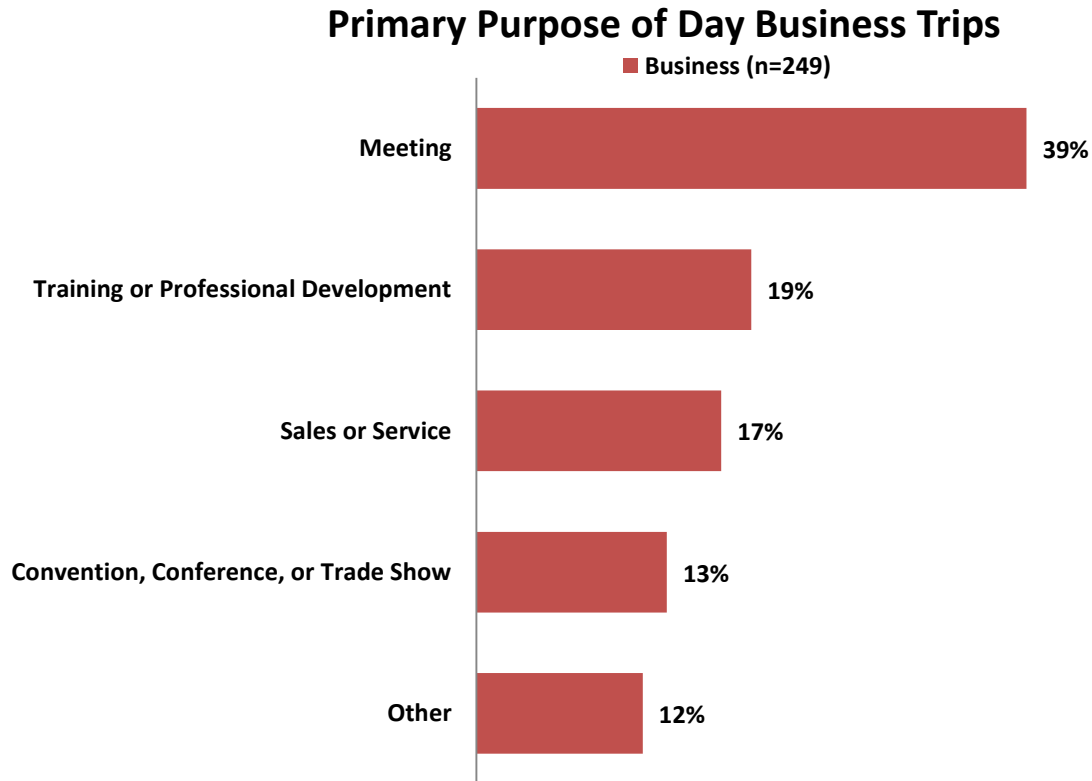
Q8. What was the primary purpose of your most recent business day trip in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Food/beverage/culinary activities and *shopping* most popular interest areas of overnight visitors.

- Among those who selected *family fun or children's activities* as an interest area, more than half (55%) ranked it as the most important interest in their decision to visit Maine. Forty-three percent of those who selected *touring/sightseeing* selected that interest as their most important.
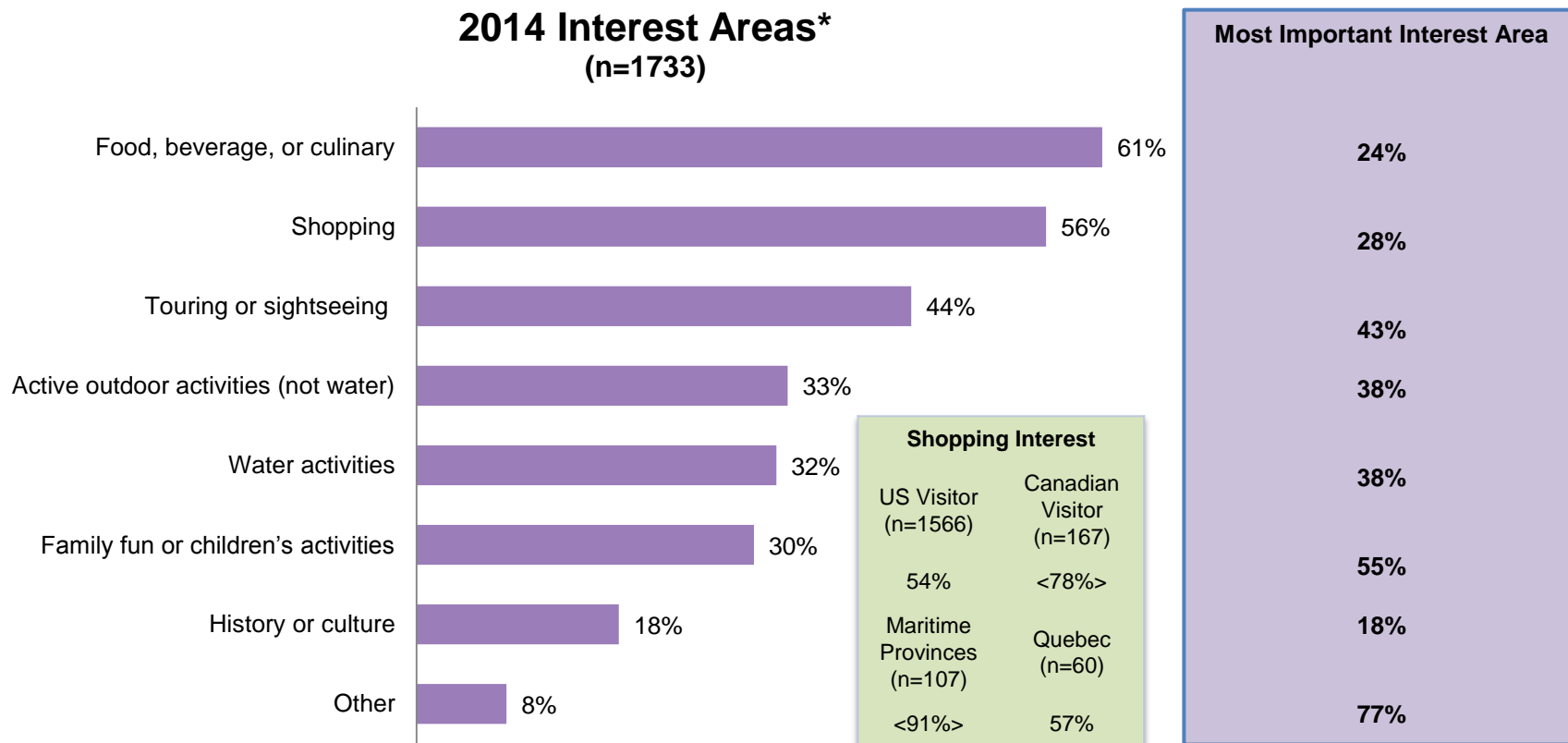
2014 Interest Areas*
(n=1733)

Most Important Interest Area

Interest Area	2014 %	Most Important %
Food, beverage, or culinary	61%	24%
Shopping	56%	28%
Touring or sightseeing	44%	43%
Active outdoor activities (not water)	33%	38%
Water activities	32%	38%
Family fun or children's activities	30%	55%
History or culture	18%	18%
Other	8%	77%

Shopping Interest

US Visitor (n=1566)	Canadian Visitor (n=167)
54%	<78%>
Maritime Provinces (n=107)	Quebec (n=60)
<91%>	57%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the <u>most important</u>.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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Touring/sightseeing activities rank highest when interest and importance are viewed in combination.

**2014 Interest Areas
Importance Index***
(n=1733)

Interest Area	Value
Touring or sightseeing	19%
Family fun or children's activities	17%
Shopping	16%
Food, beverage, or culinary	15%
Active outdoor activities (not water)	13%
Water activities	12%
History or culture	3%
Other	6%

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

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- Not surprisingly, *water activities* are more likely to be an interest during the Summer months. *Food/beverage/culinary* activities are more popular during the colder Fall and Winter months.

- Visitors traveling with children are more likely to list active interest areas such as *active outdoor activities, water activities*, and *family fun or children's activities.* These active interest areas are also more popular among younger travelers (< 35 yrs).

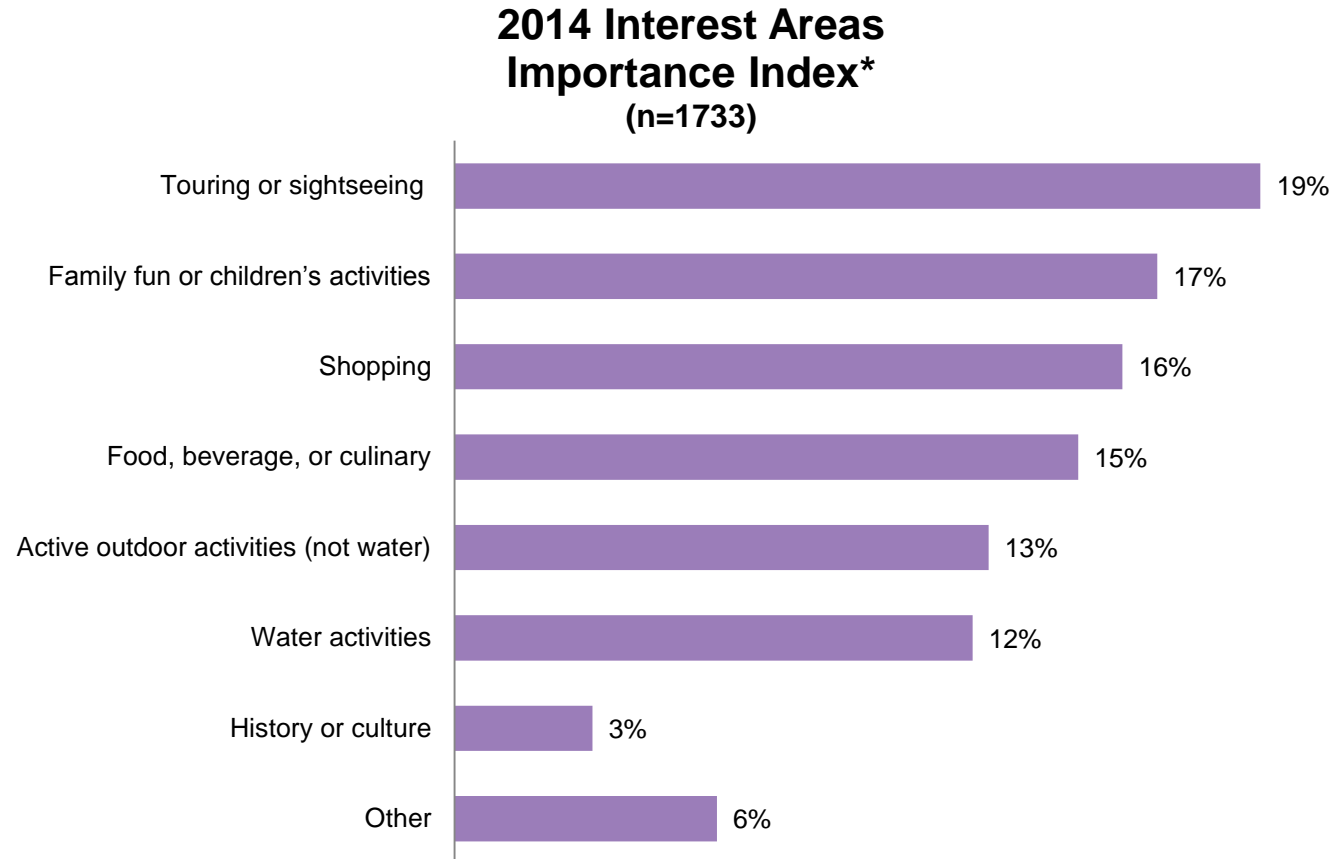| Interest Area	NET 2014 (n=1733)	Kids on Trip		Age				Season		
		Kids (n=483) a	No Kids (n=1251) b	<35 (n=420) c	35-44 (n=278) d	45-54 (n=383) e	55+ (n=653) f	Winter (n=220) g	Summer (n=1235) h	Fall (n=279) i
Food, beverage, or culinary	61%	58%	62%	59%	57%	61%	63%	61%	60%	65%
Shopping	56%	56%	56%	52%	58%	60%	56%	61%h	54%	61%h
Touring or sightseeing	44%	45%	44%	49%e	44%	39%	44%	42%	44%	47%
Active outdoor activities (not water)	33%	41%b	29%	47%def	37%f	29%	24%	30%	33%	35%
Water activities	32%	46%b	27%	40%ef	34%	30%	28%	18%	36%gi	26%g
Family fun or children's activities	30%	63%b	17%	42%ef	46%ef	25%f	18%	24%	31%g	30%g
History or culture	18%	18%	18%	19%	17%	19%	18%	17%	17%	22%h
Other	8%	4%	9%a	2%	7%c	7%c	12%cde	9%	8%	6%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- *General sightseeing* and *driving for pleasure* are also popular touring/sightseeing activities undertaken by day visitors.
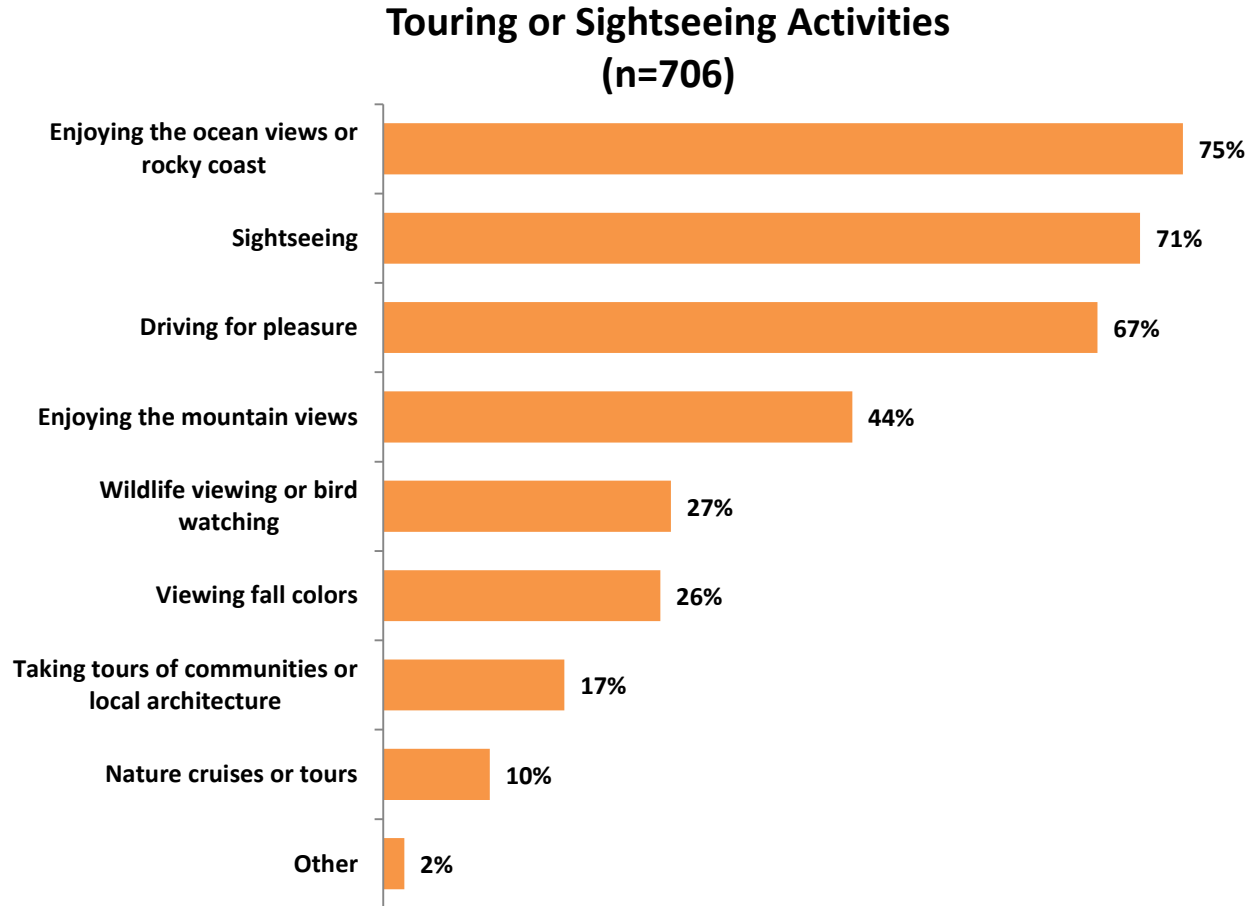
Touring or Sightseeing Activities
(n=706)

Activity	Percentage
Enjoying the ocean views or rocky coast	75%
Sightseeing	71%
Driving for pleasure	67%
Enjoying the mountain views	44%
Wildlife viewing or bird watching	27%
Viewing fall colors	26%
Taking tours of communities or local architecture	17%
Nature cruises or tours	10%
Other	2%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- First-time day visitors and 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.*

Food, Beverage, or Culinary Activities
(n=1053)

Activity	Percent
Ate lobster or other local seafood	64%
Consumed other locally produced Maine foods (i.e. blueberries, maple syrup, or apples)	48%
Enjoyed unique Maine food or beverages (i.e. whoopie pies or Moxie)	37%
Going to local brew pubs or craft breweries	34%
Enjoying local food at fairs or festivals	25%
Visited Farmer's Markets	22%
Enjoyed high-end cuisine or five-star dining	14%
Ate farm to table or organic cuisine	13%
Other	4%

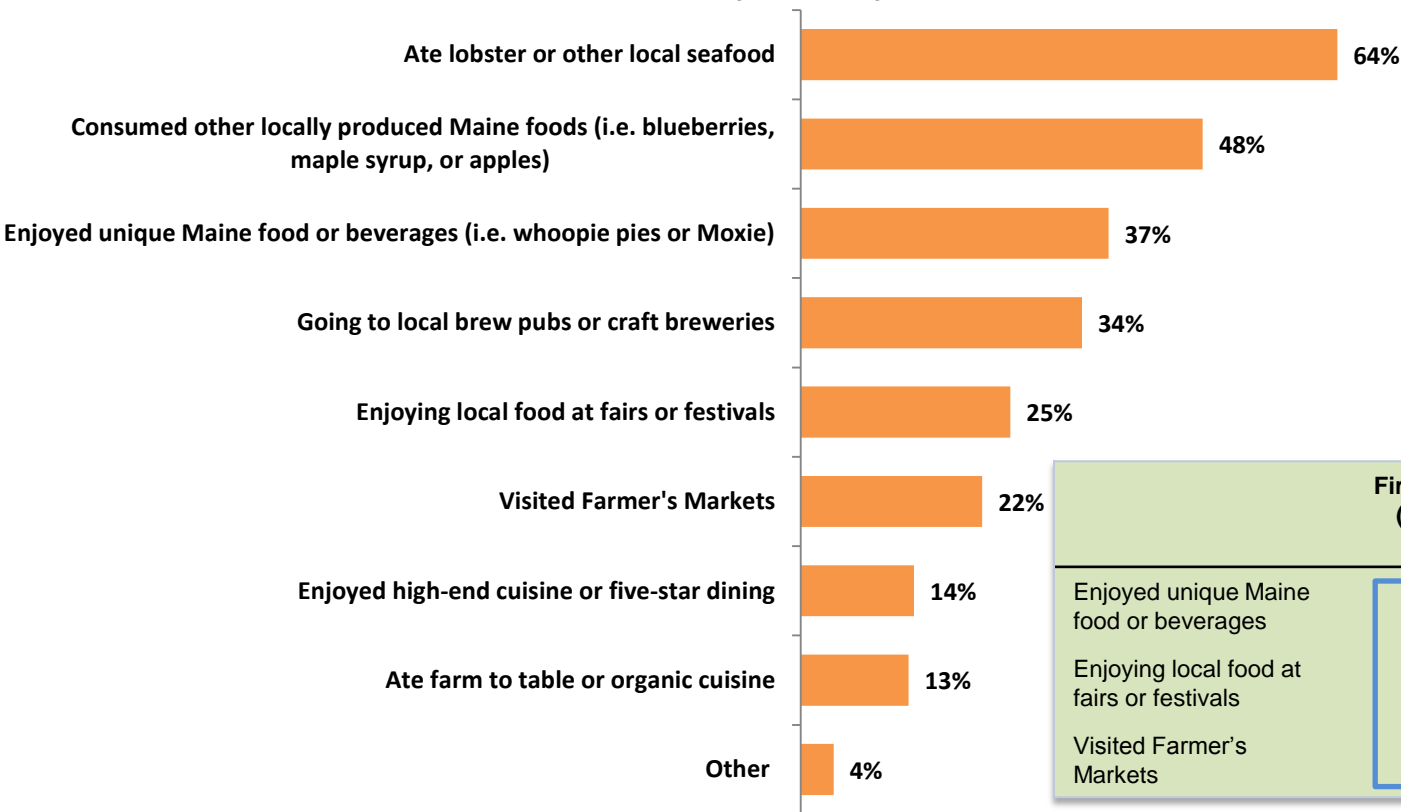|	First-Time (n=62) a	Repeat (n=991) b	Kids (n=279) c	No Kids (n=774) d
Enjoyed unique Maine food or beverages	54%b	36%	47%d	33%
Enjoying local food at fairs or festivals	41%b	24%	32%d	23%
Visited Farmer's Markets	37%b	21%	29%d	19%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- In-state day visitors and those traveling with children are more likely to participate in a number of activities, as seen in the table below.

Water Activities
(n=559)

Activity	%
Going to the beach	71%
Outdoor swimming (lake, ocean, river)	56%
Canoeing or kayaking	30%
Fishing (ocean, lake, stream, river, ice)	25%
Pool swimming (indoor or outdoor)	23%
Motor boating	12%
Water skiing or jet skiing	7%
Sailing	7%
White water rafting	6%
Surfing	5%
Other	3%

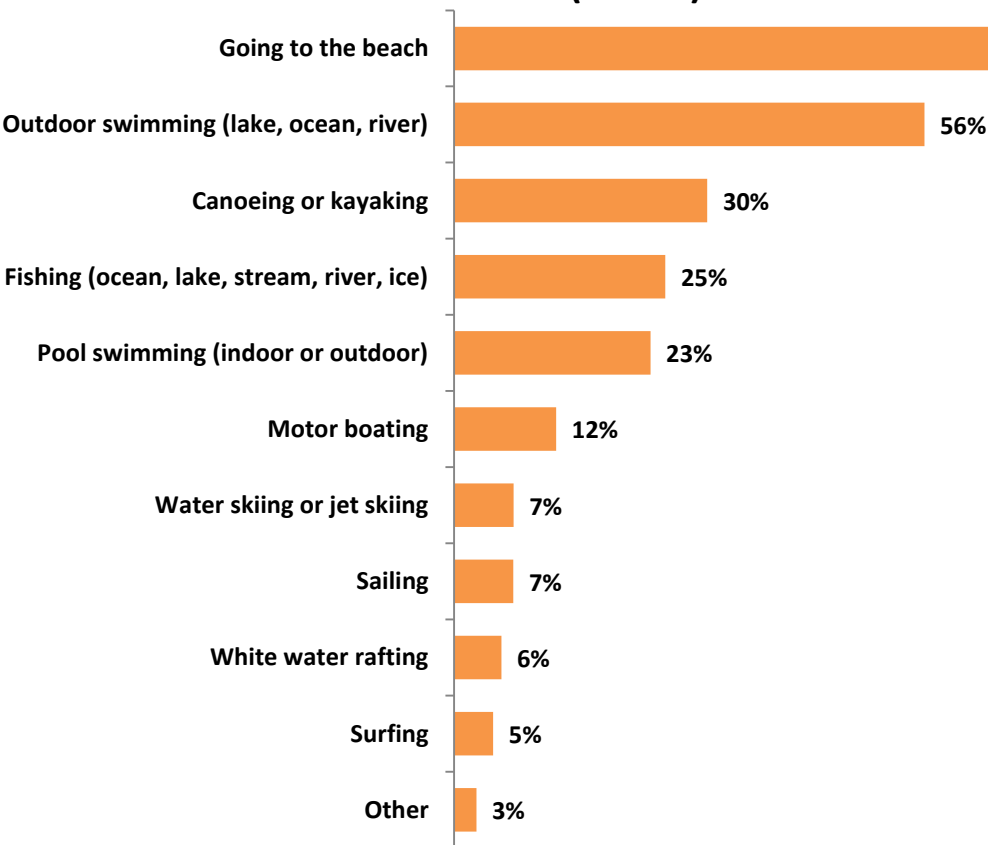|	Maine (n=127) a	New England (n=402) b	Canada (n=30) c	Kids (n=221) d	No Kids (n=338) e
Going to the beach	65%	72%	75%	76%e	67%
Outdoor swimming	66%b	53%	58%	68%e	48%
Canoeing or kayaking	41%bc	28%	15%	28%	32%
Fishing	36%bc	23%	12%	32%e	21%
Pool swimming	30%	21%	33%	27%	21%
Motor boating	12%bc	13%c	1%	8%	15%d
Water skiing or jet skiing	6%	8%	6%	8%	6%
Sailing	13%b	5%	11%	8%	7%
White water rafting	4%	7%	--	5%	6%
Surfing	4%	5%	11%	6%	4%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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Majority of day visitors interested in non-water active outdoor activities engage in *hiking/climbing/backpacking* while in Maine.
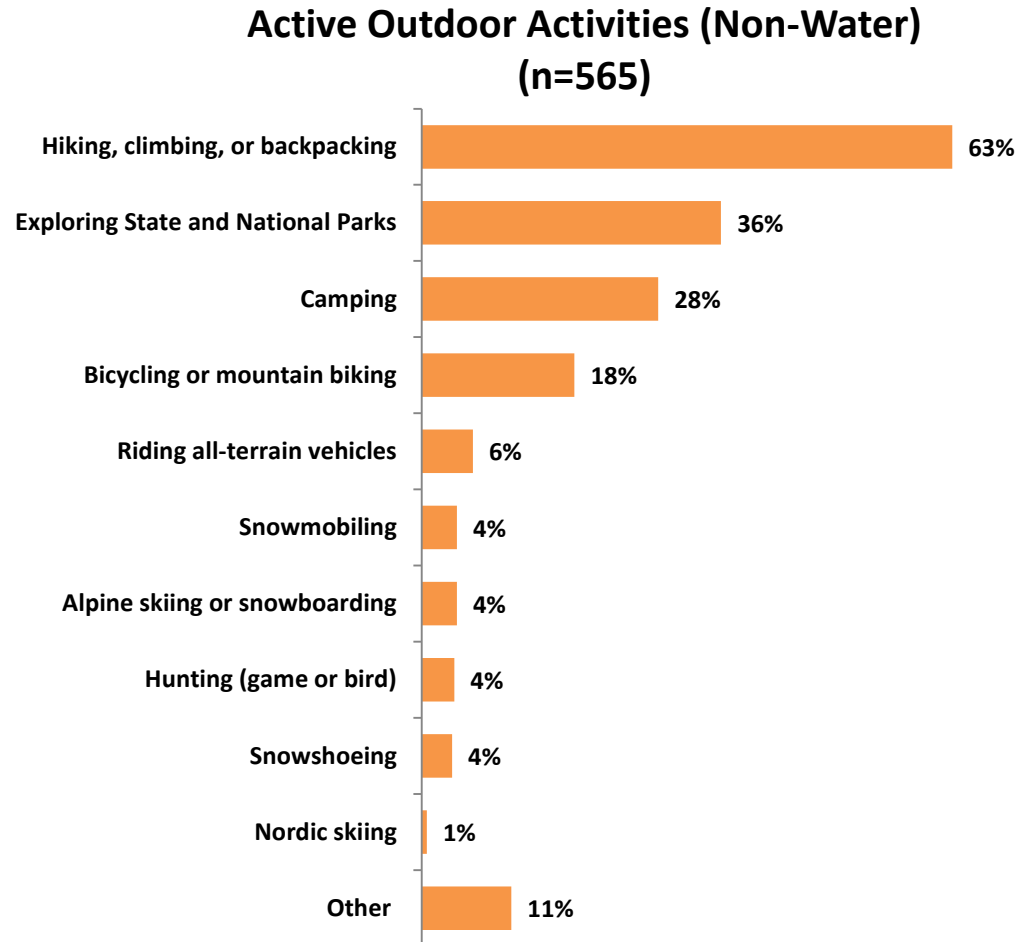
Active Outdoor Activities (Non-Water)
(n=565)

Activity	Percentage
Hiking, climbing, or backpacking	63%
Exploring State and National Parks	36%
Camping	28%
Bicycling or mountain biking	18%
Riding all-terrain vehicles	6%
Snowmobiling	4%
Alpine skiing or snowboarding	4%
Hunting (game or bird)	4%
Snowshoeing	4%
Nordic skiing	1%
Other	11%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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Visiting historic sites or museums most popular history/culture activity among visitors interested in this area.

- *Getting to know the local people and/or culture* and *visiting art museums or local artisan exhibits* were also popular activities among day visitors interested in history or culture.

History or Culture Activities
(n=315)

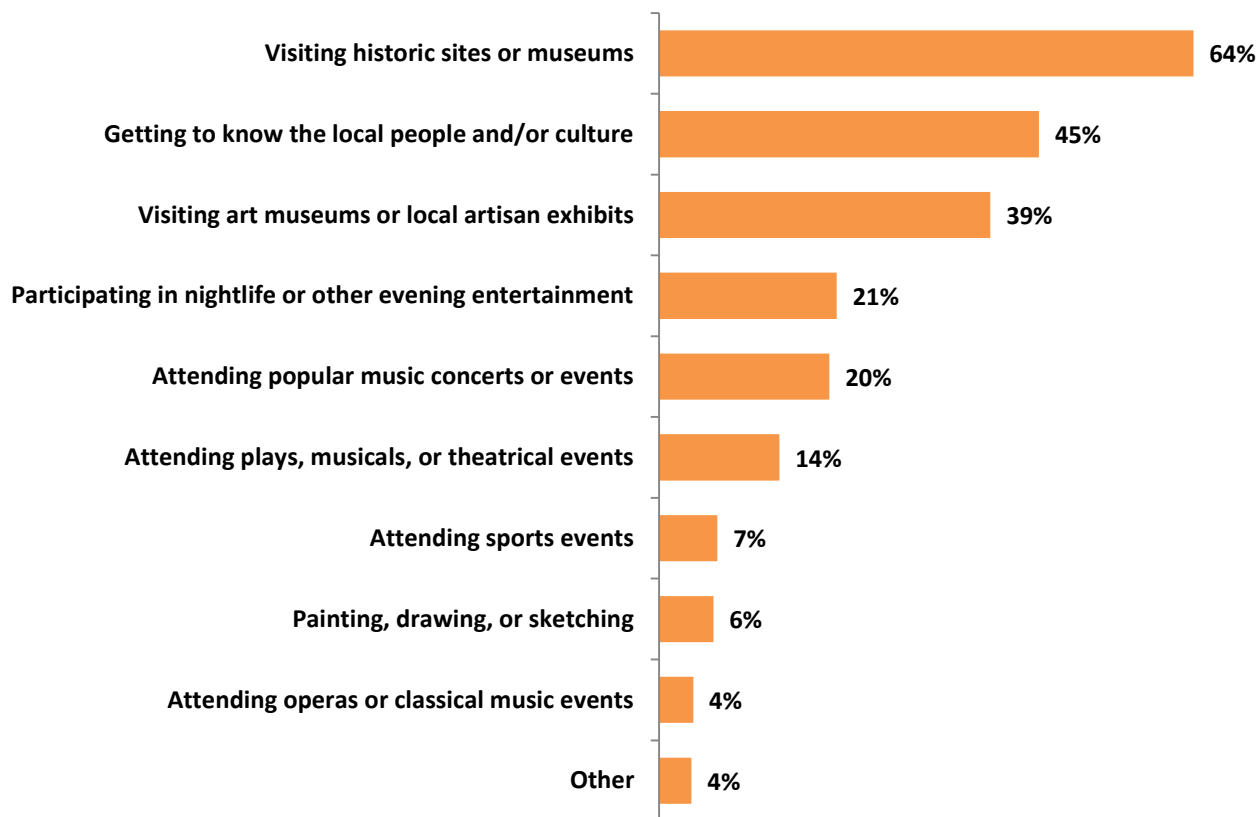| Activity	Percentage
Visiting historic sites or museums	64%
Getting to know the local people and/or culture	45%
Visiting art museums or local artisan exhibits	39%
Participating in nightlife or other evening entertainment	21%
Attending popular music concerts or events	20%
Attending plays, musicals, or theatrical events	14%
Attending sports events	7%
Painting, drawing, or sketching	6%
Attending operas or classical music events	4%
Other	4%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

- *General mall/downtown shopping* was also a common shopping activity, as was *shopping for unique, locally produced goods*.

**Shopping Activities
(n=972)**

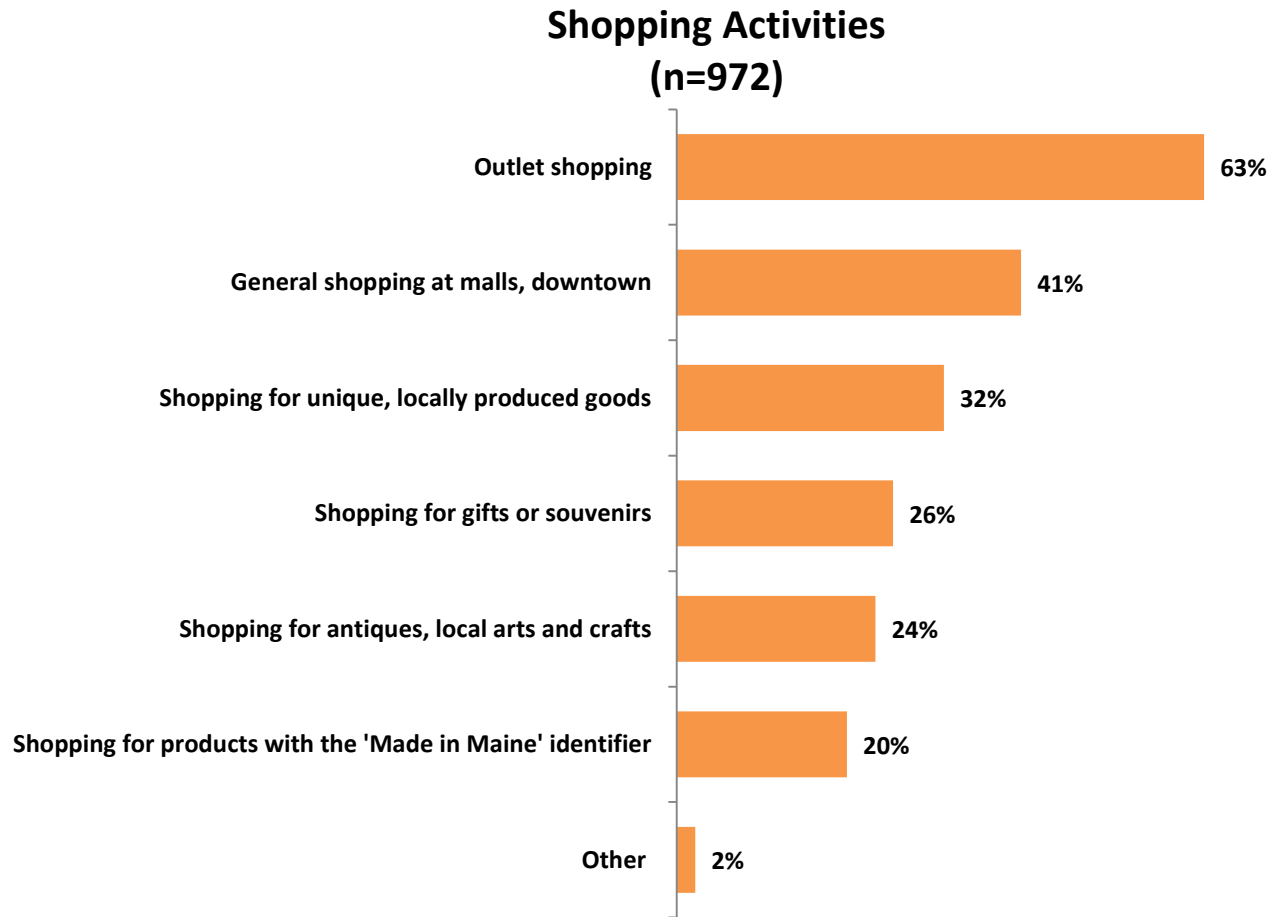| Activity	Percentage
Outlet shopping	63%
General shopping at malls, downtown	41%
Shopping for unique, locally produced goods	32%
Shopping for gifts or souvenirs	26%
Shopping for antiques, local arts and crafts	24%
Shopping for products with the 'Made in Maine' identifier	20%
Other	2%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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

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

Family Fun/Children's Activities
(n=515)

Activity	Percentage
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	41%
Animal parks or zoos	29%
Amusement or theme parks	21%
Water parks	20%
Children's museums	17%
Agricultural fairs	13%
Spectator sports	8%
Summer camps	7%
Horseback riding	6%
Other	19%

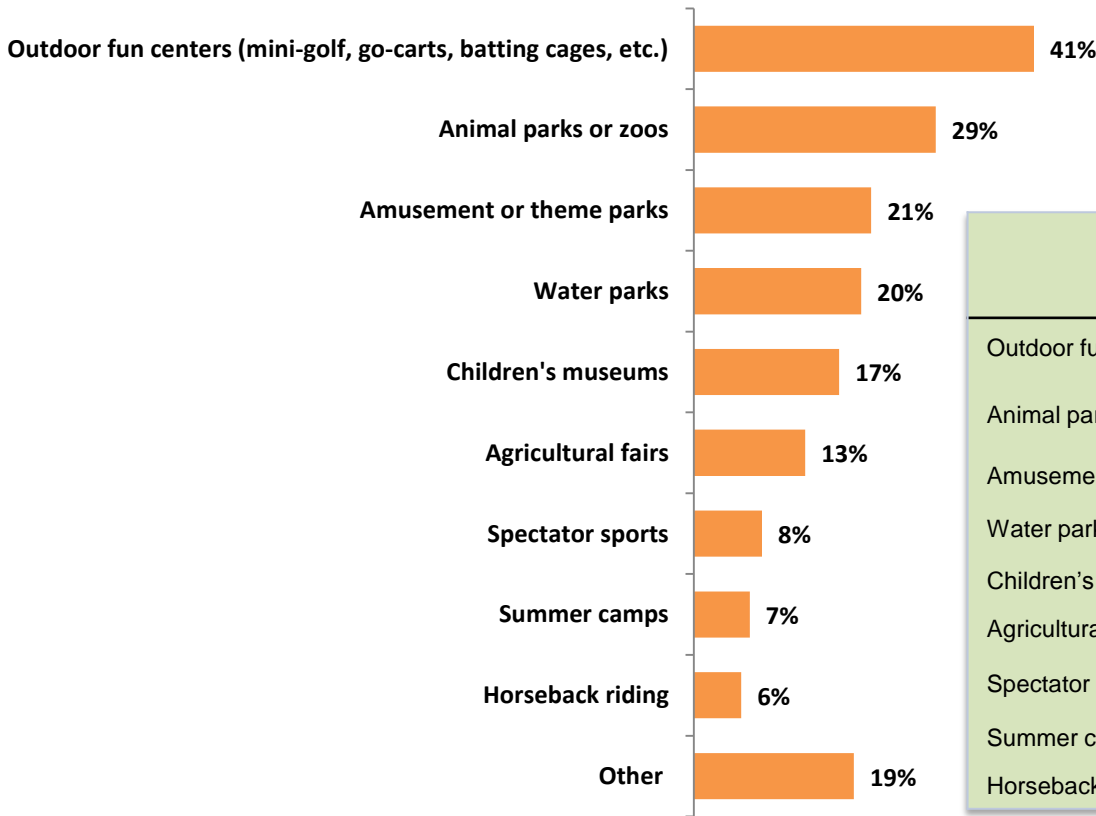|	<45 yrs (n=307) a	45+ yrs (n=208) b	Kids (n=302) c	No Kids (n=213) d
Outdoor fun centers	85%b	75%	42%	38%
Animal parks or zoos	71%b	38%	38%d	15%
Amusement or theme parks	58%b	18%	25%d	15%
Water parks	50%b	26%	24%d	14%
Children's museums	45%b	20%	24%d	7%
Agricultural fairs	24%	29%	13%	13%
Spectator sports	15%	17%	6%	11%
Summer camps	13%	13%	8%	5%
Horseback riding	17%b	4%	7%	3%

Q19. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
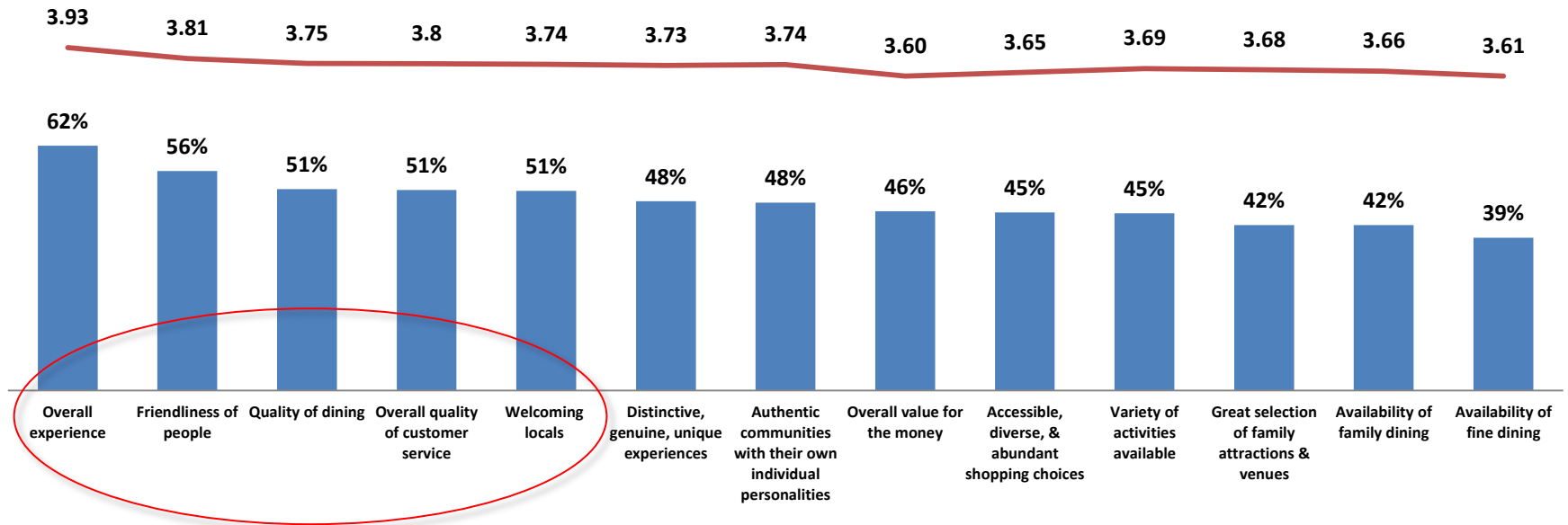*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

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Day visitors' expectations surpassed for *overall experience* provided and *friendliness of the people.*

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

Maine Far Exceeded/Somewhat Above My Expectations*
(n=1733)

Legend: Top 2 Box (bar) — Mean Rating (line)

Category	Mean Rating	Top 2 Box
Overall experience	3.93	62%
Friendliness of people	3.81	56%
Quality of dining	3.75	51%
Overall quality of customer service	3.8	51%
Welcoming locals	3.74	51%
Distinctive, genuine, unique experiences	3.73	48%
Authentic communities with their own individual personalities	3.74	48%
Overall value for the money	3.60	46%
Accessible, diverse, & abundant shopping choices	3.65	45%
Variety of activities available	3.69	45%
Great selection of family attractions & venues	3.68	42%
Availability of family dining	3.66	42%
Availability of fine dining	3.61	39%

Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*The wording and rating scale used in this question was revised for the 2014 questionnaire; therefore, no comparisons can be made to prior years.

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Fall day visitors more likely to report Maine exceeding expectations on most attributes.

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

	NET 2014 (n=1733)	Winter (n=220) [a]	Summer (n=1235) [b]	Fall (n=279) [c]
Overall experience	62%	59%	61%	70%ab
Friendliness of the people	56%	54%	55%	60%
Quality of dining	51%	48%	50%	60%ab
Overall quality of customer service	51%	49%	50%	57%ab
Welcoming locals	51%	47%	51%	55%a
Distinctive, genuine, unique experiences	48%	47%	47%	55%ab
Authentic communities with their own individual personalities	48%	45%	47%	54%ab
Overall value for the money	46%	42%	45%	53%ab
Accessible, diverse, and abundant shopping choices	45%	43%	44%	53%ab
Variety of activities available	45%	42%	45%	49%a
Great selection of family attractions and venues	42%	40%	42%	46%a
Availability of family dining	42%	38%	41%	50%ab
Availability of fine dining	39%	38%	38%	44%b

Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
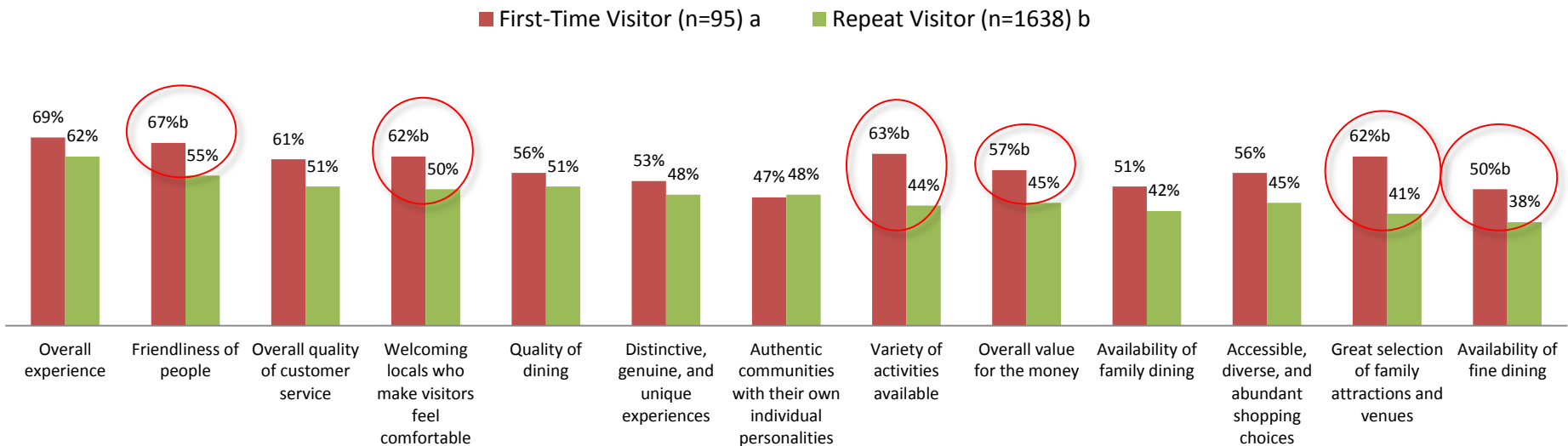<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*The wording and rating scale used in this question was revised for the 2014 questionnaire; therefore, no comparisons can be made to prior years.

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Maine more likely to exceed expectations on a number of attributes for first-time day visitors than for repeat visitors.

- These attributes may point to areas where non-visitors have less positive perceptions of Maine – perceptions that are changed once they experience a vacation in the State.

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

■ First-Time Visitor (n=95) a   ■ Repeat Visitor (n=1638) b

Attribute	First-Time Visitor	Repeat Visitor
Overall experience	69%	62%
Friendliness of people	67%b	55%
Overall quality of customer service	61%	51%
Welcoming locals who make visitors feel comfortable	62%b	50%
Quality of dining	56%	51%
Distinctive, genuine, and unique experiences	53%	48%
Authentic communities with their own individual personalities	47%	48%
Variety of activities available	63%b	44%
Overall value for the money	57%b	45%
Availability of family dining	51%	42%
Accessible, diverse, and abundant shopping choices	56%	45%
Great selection of family attractions and venues	62%b	41%
Availability of fine dining	50%b	38%

Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
a, b, c indicates significant difference at the 95% confidence level
*The wording and rating scale used in this question was revised for the 2014 questionnaire; therefore, no comparisons can be made to prior years.

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Domestic day visitors more likely to indicate Maine visit exceeded their expectations on several attributes than Canadian visitors.

Maine Far Exceeded/Somewhat Above My Expectations
(n=1733)

■ United States (n=1566) a   ■ Canada (n=167) b

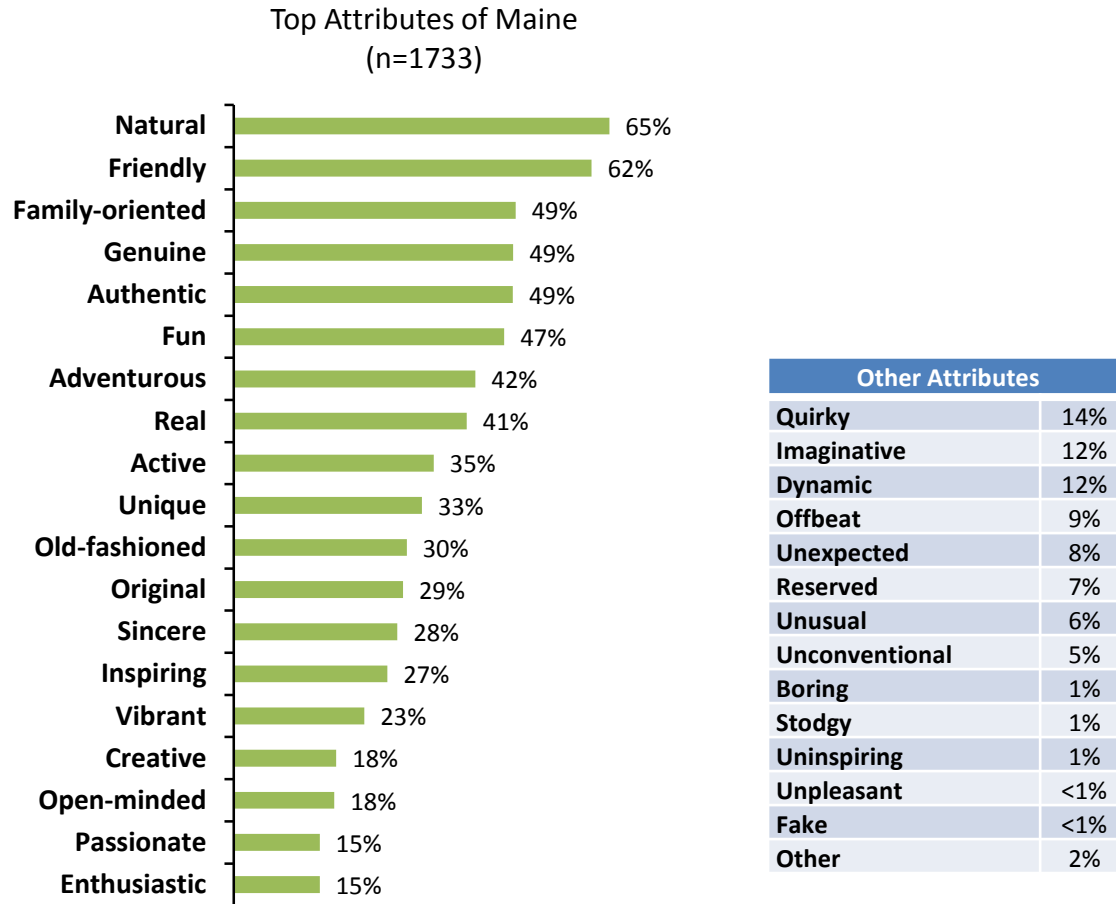| Attribute	United States	Canada
Overall experience	64%b	50%
Friendliness of people	56%	53%
Quality of dining	53%b	36%
Overall quality of customer service	51%	50%
Welcoming locals who make visitors feel comfortable	51%	49%
Distinctive, genuine, unique experiences	50%b	33%
Authentic communities with their own individual personalities	49%b	39%
Overall value for the money	46%	45%
Accessible, diverse, & abundant shopping choices	46%	42%
Variety of activities available	46%b	32%
Great selection of family attractions & venues	43%	32%
Availability of family dining	43%b	34%
Availability of fine dining	39%	34%

Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
*The wording and rating scale used in this question was revised for the 2014 questionnaire; therefore, no comparisons can be made to prior years.

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"Natural" and "Friendly" among top words selected by day visitors to describe Maine's personality.

- In results nearly identical to overnight visitors, nearly two-thirds of Maine's day visitors selected "natural" or "friendly" to describe Maine's personality, if Maine were a person. Words selected by 1% or fewer included *boring, stodgy, uninspiring, unpleasant,* and *fake*.

Top Attributes of Maine
(n=1733)

Attribute	%
Natural	65%
Friendly	62%
Family-oriented	49%
Genuine	49%
Authentic	49%
Fun	47%
Adventurous	42%
Real	41%
Active	35%
Unique	33%
Old-fashioned	30%
Original	29%
Sincere	28%
Inspiring	27%
Vibrant	23%
Creative	18%
Open-minded	18%
Passionate	15%
Enthusiastic	15%

Other Attributes	
Quirky	14%
Imaginative	12%
Dynamic	12%
Offbeat	9%
Unexpected	8%
Reserved	7%
Unusual	6%
Unconventional	5%
Boring	1%
Stodgy	1%
Uninspiring	1%
Unpleasant	<1%
Fake	<1%
Other	2%

Q33. If Maine were a person, which of the following words would you choose to describe its personality? Please check all that apply.

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Key Visitor Metrics

<u>Overnight</u> visitor spending averaged $1,000 per travel party, with highest proportion spent on lodging.

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

- *Note: The large year-over-year increase in recreation spending is largely due to a change in the 2014 questionnaire, which showed more recreation spending examples than in previous years. This change likely made it easier for respondents to call to mind their recreation spending.*

Overnight Visitor Spending

2014 Overnight Travel Spending	2013 Total (n=2675)	2014 Total (n=2930)	2014 Leisure (n=1319) (a)	2014 VFR (n=1142) (b)	2014 Business (n=468) (c)
Total Net Spending (Mean**)	$983.74	$1000.47	$1095.33b	$814.67	$1186.38b
Lodging (Median*)	$300	$325	$350	$300	$350
Transportation (Median*)	$100	$100	$100	$100	$100
Food (Median*)	$200	$160	$200	$150	$200
Retail Goods (Mean**)	$147.18	$144.17	$163.51b	$110.79	$171.13b
Recreation (Mean**)	$41.13	$64.71	$65.84	$60.91	$70.76

Medians excluding zero without outliers
*** Means including zero without outliers*

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

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<u>Day</u> visitor spending averaged just over $325 per travel party, with highest proportions spent on food and retail goods.

- Similar to overnight visitors, leisure and business day travelers spent the highest amounts in Maine.
- *Note: The large year-over-year increase in recreation spending is largely due to a change in the 2014 questionnaire, which showed more recreation spending examples than in previous years. This change likely made it easier for respondents to call to mind their recreation spending.*

Day Visitor Spending

2014 Day Travel Spending	2013 Total (n=1685)	2014 Total (n=1733)	2014 Leisure (n=790) (a)	2014 VFR (n=695) (b)	2014 Business (n=249) (c)
Net Spending (Mean**)	**$305.29**	**$327.37**	**$334.02**	**$318.26**	**$331.69**
Transportation (Median*)	$50	$60	$60	$65	$75
Food (Median*)	$60	$100	$100	$100	$100
Retail Goods (Mean**)	$84.25	$93.78	$104.65b	$82.94	$89.52
Recreation (Mean**)	$15.87	$38.56	$37.89	$38.71	$40.24

*Medians excluding zero without outliers
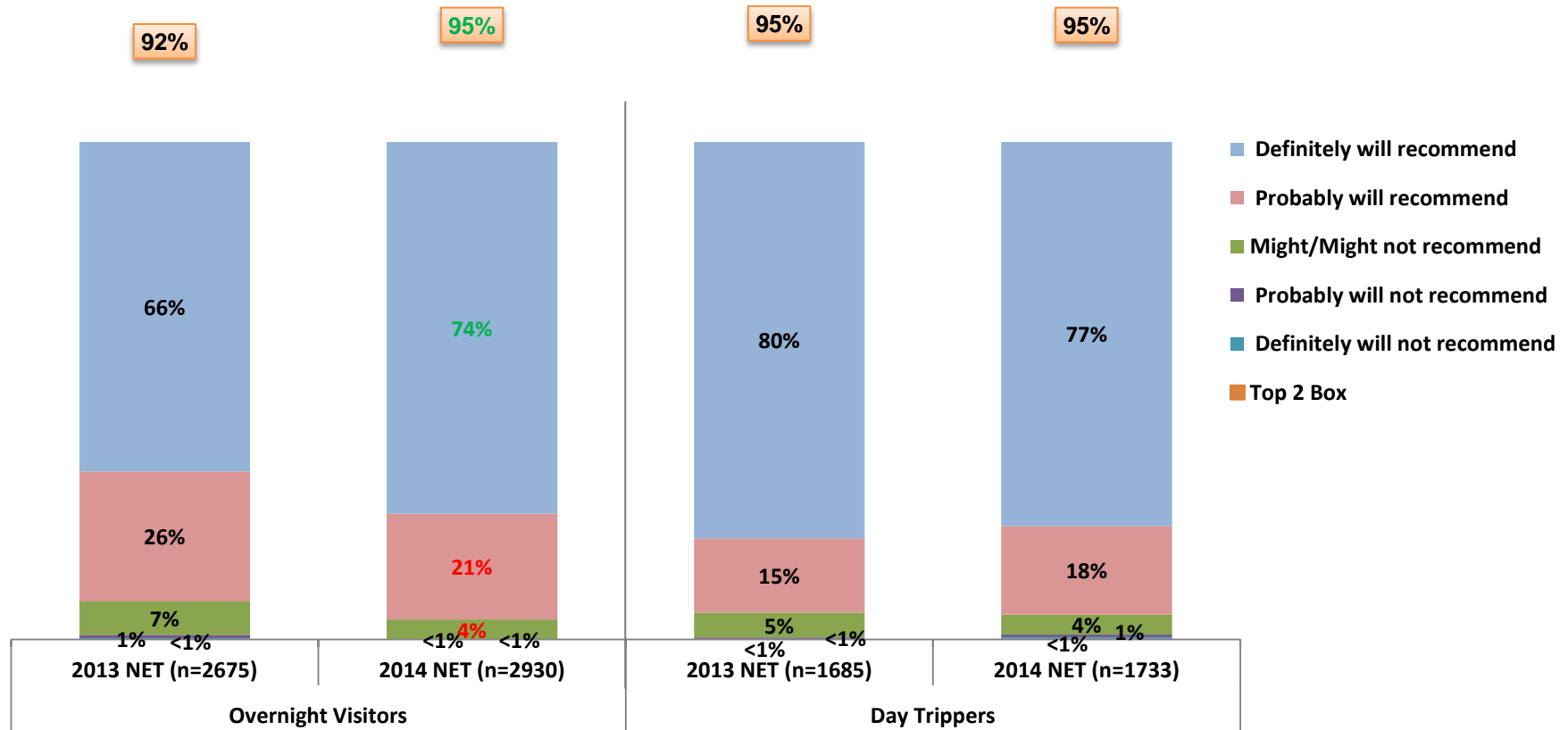*** Means including zero without outliers*

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

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

- Overnight visitors in 2014 appear to be even more decided in their intent to recommend Maine as a vacation destination than 2013 overnight visitors. Three-fourths of overnight visitors (74%) say they will *definitely* recommend Maine, as compared to two-thirds in 2013 (66%).

Likelihood to Recommend Maine

Legend:
- Definitely will recommend
- Probably will recommend
- Might/Might not recommend
- Probably will not recommend
- Definitely will not recommend
- Top 2 Box

Overnight Visitors
- 2013 NET (n=2675): 92%, 66%, 26%, 7%, 1%, <1%
- 2014 NET (n=2930): 95%, 74%, 21%, 4%, <1%, <1%

Day Trippers
- 2013 NET (n=1685): 95%, 80%, 15%, 5%, <1%, <1%
- 2014 NET (n=1733): 95%, 77%, 18%, 4%, <1%, 1%

Overnight Q39, Day Q31. How likely will you be to recommend Maine as a vacation destination to friends or relatives?
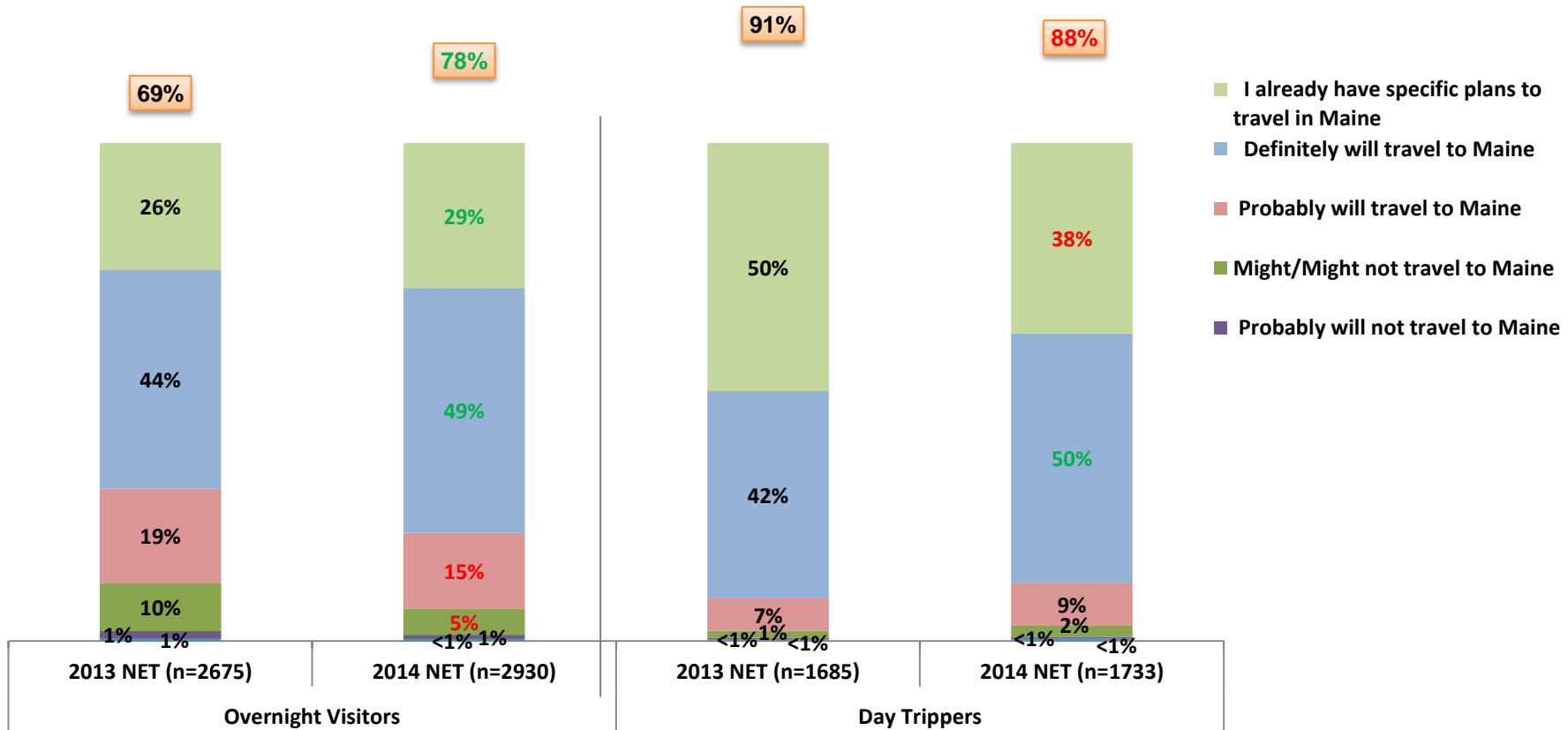<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Future intent to visit Maine also remains high and shows increase over 2013.

- Similar to the higher reported intent to recommend Maine as a vacation destination, a higher proportion of overnight visitors expressed an intent to _visit_ Maine again in the future as compared to 2013 overnight visitors (78% versus 69%).

Likelihood to Travel to Maine in Future

Legend:
- I already have specific plans to travel in Maine
- Definitely will travel to Maine
- Probably will travel to Maine
- Might/Might not travel to Maine
- Probably will not travel to Maine

Overnight Visitors:
- 2013 NET (n=2675): 69% — 26%, 44%, 19%, 10%, 1%, 1%
- 2014 NET (n=2930): 78% — 29%, 49%, 15%, 5%, <1%, 1%

Day Trippers:
- 2013 NET (n=1685): 91% — 50%, 42%, 7%, 1%, <1%, <1%
- 2014 NET (n=1733): 88% — 38%, 50%, 9%, 2%, <1%, <1%
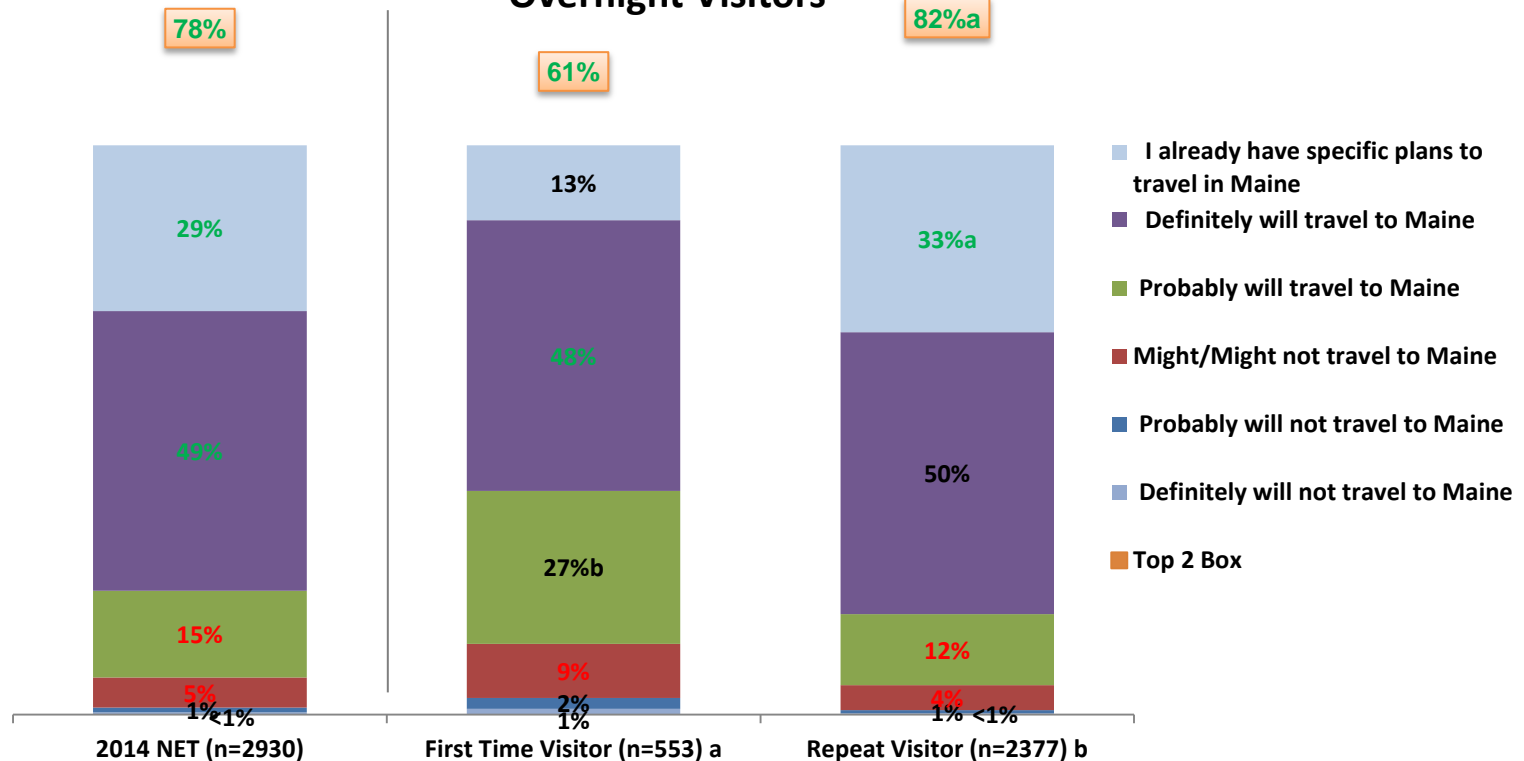
Overnight Q38, Day Q30. How likely will you be to travel in Maine in the next two years?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight visitors certain they will visit Maine in the next two years exhibit differences from other visitors.

- Younger overnight visitors (<45 yrs), those traveling with children, visitors during the Winter and Summer months, and those staying in unpaid accommodations all are more likely to report that they either *already have specific plans to travel in Maine in the next two years* or *definitely will travel to Maine.*

18-44 yrs (n=1410)	45+ yrs (n=1520)
<80%>	76%
Paid Accommodations (n=2008)	**Unpaid Accommodations (n=921)**
75%	<85%>
Kids on Trip (n=937)	**No Kids (n=1992)**
<83%>	76%

Winter (n=461) a	Summer (n=1519) b	Fall (n=950) c
82%c	79%c	75%

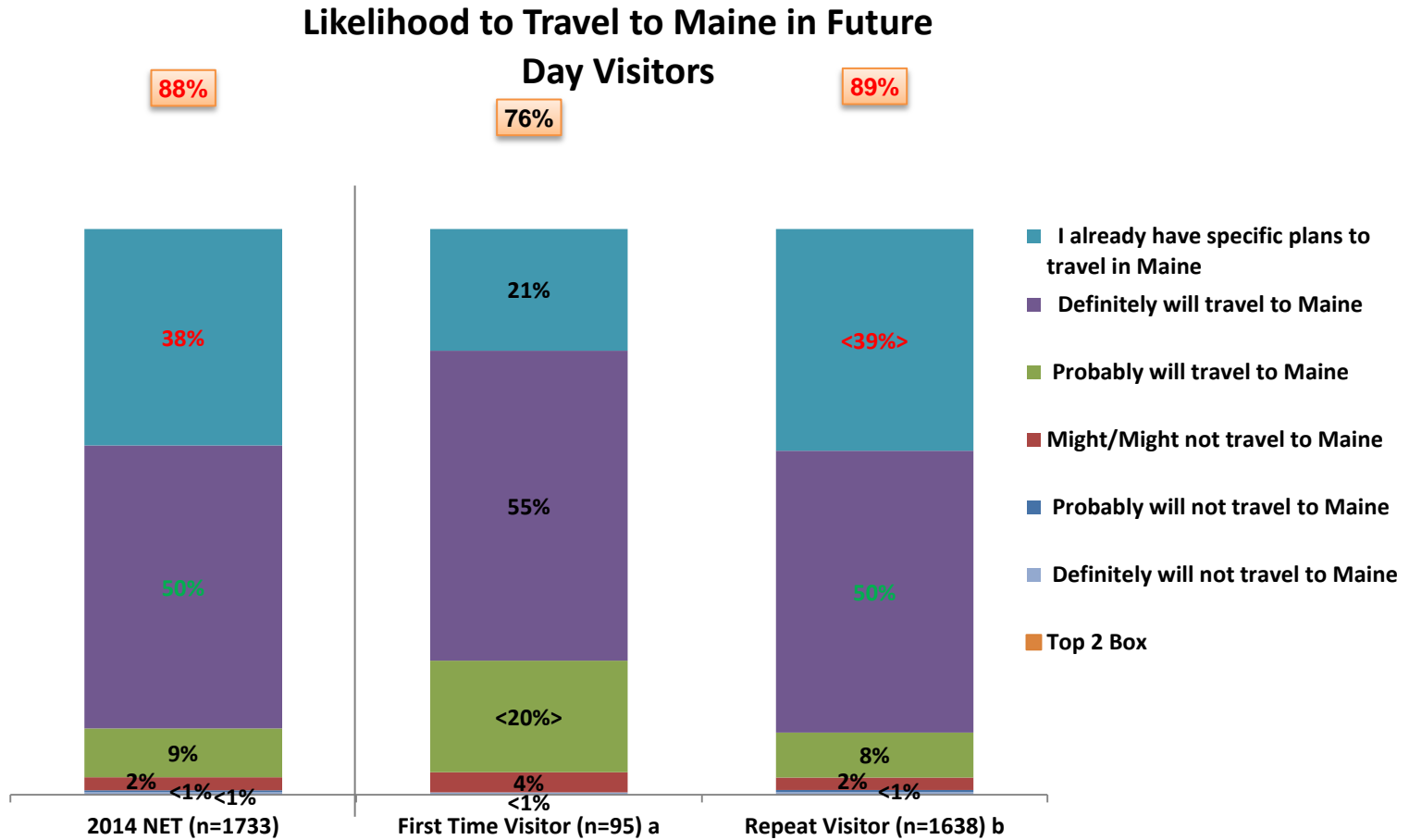Overnight Q38, Day Q30. How likely will you be to travel in Maine in the next two years?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight repeat visitors express higher future travel intent than first-time visitors.

Likelihood to Travel to Maine in Future
Overnight Visitors

2014 NET (n=2930)
- 78%
- 29%
- 49%
- 15%
- 5%
- 1% <1%

First Time Visitor (n=553) a
- 61%
- 13%
- 48%
- 27%b
- 9%
- 2%
- 1%

Repeat Visitor (n=2377) b
- 82%a
- 33%a
- 50%
- 12%
- 4%
- 1% <1%

Legend:
- I already have specific plans to travel in Maine
- Definitely will travel to Maine
- Probably will travel to Maine
- Might/Might not travel to Maine
- Probably will not travel to Maine
- Definitely will not travel to Maine
- Top 2 Box

Overnight Q38. How likely will you be to travel in Maine in the next two years?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Similarly, repeat day visitors more likely to express future travel intent than first-time day visitors.

Likelihood to Travel to Maine in Future
Day Visitors

Legend:
- ■ I already have specific plans to travel in Maine
- ■ Definitely will travel to Maine
- ■ Probably will travel to Maine
- ■ Might/Might not travel to Maine
- ■ Probably will not travel to Maine
- ■ Definitely will not travel to Maine
- ■ Top 2 Box

Chart data:

2014 NET (n=1733) — 88%
- 38%
- 50%
- 9%
- 2%
- <1%, <1%

First Time Visitor (n=95) a — 76%
- 21%
- 55%
- <20%>
- 4%
- <1%

Repeat Visitor (n=1638) b — 89%
- <39%>
- 50%
- 8%
- 2%
- <1%

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Demographic Profile

Visitor Demographics

	Overnight Visitors		Day Visitors	
	2013 **(n=2675)**	**2014** **(n=2930)**	**2013** **(n=1685)**	**2014** **(n=1733)**
Age:				
< 35	25%	**29%**	20%	**24%**
35 – 44	17%	19%	15%	16%
45 – 54	22%	20%	25%	22%
55 +	35%	**32%**	40%	38%
Mean Age (Years)	47.1	**45.4**	49.0	47.9
Income:				
< $50,000	11%	**16%**	19%	**22%**
$50,000 - $99,000	33%	**40%**	42%	43%
$100,000 +	45%	44%	39%	36%
Estimated Mean Income	$115,430	**$106,260**	$98,010	**$93,610**
Female	47%	**54%**	54%	56%
College Degree or Higher	81%	**73%**	72%	69%
Married	60%	**66%**	66%	64%
Employed Full Time	68%	**62%**	63%	**54%**

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

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Conclusions

Conclusions

- **Once more, Maine continued to outperform national averages in overnight travel during 2014.** While the proportion of Americans taking an overnight trip in the U.S. this past year remained stable with 2012 and 2013, Maine attracted 4% *more* overnight visitors than it had in 2013. Further, despite a difficult travel winter nationwide with continued stormy weather up and down the East Coast, even visitation during the Winter season was up over last year.

- **After continuous increases over the past two years, Canadian overnight visitation to Maine decreased in 2014, returning to levels seen prior to 2012.** Though still a primary market for Maine tourism, a sharply declining exchange rate has impacted Canadians' purchasing power in Maine, and possibly their motivation to travel to Maine. Canadians are more likely than Americans to shop while visiting Maine, so the impact of the exchange rate on their favored activity could likely play a role in this decreased visitation. Continued advertising in this core market educating them on the multitude of activities available in Maine *beyond shopping* would be advantageous to the Maine tourism industry.

Conclusions

- **The obvious necessity for a strong Internet and social media presence is well supported in visitors' planning and travel habits.** For seven years now, the Internet remains the top source of information for visitors planning a trip to Maine. In addition, the proportion of travelers relying on *social media* to help them plan their trip has increased for the second year in a row. This increase in social media usage can be seen across trip types, seasons, visitor origin, first-time and repeat visitor status, and accommodation type. In addition to travel planning, the majority of visitors to Maine report that they *continued to research things to do and places to see <u>while in Maine</u>*, further supporting the need for a strong online presence and a user-friendly and accessible website.

- **Maine tourism websites maintain a solid presence among online planning sources utilized.** For those travelers using the Internet to plan their trip to Maine, both *visitmaine.com* and the individual tourism region websites remain among the top 5 websites consulted. Aside from more general travel information websites such as TripAdvisor, Google, etc., these Maine-specific sites play a critical role in providing travelers and potential travelers with information on activities, locations to visit, etc.

Conclusions

- **Travel with children appears to be on the upswing, with the proportion of visitors bringing children on their trip to Maine increasing for the second year in a row.** Maine must continue to market the State as a family-friendly destination and highlight the numerous family activities available. Visitors traveling with children are more likely to have considered other destinations while thinking about their trip to Maine, illustrating the need for an even more aggressive marketing scheme to highlight the children's/family activities that Maine has to offer. These families also tend to stay in Maine longer – this fact, coupled with their larger party size, results in increased spending among this important group of travelers. Further exploration into the motivations, interests, and travel habits of this critical travel component is warranted.

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Conclusions

- **2014 experienced a sizable increase in the proportion of first-time visitors to Maine, pointing to a successful introduction of the State to new visitors through marketing and communications.** These first-time visitors are more apt to arrive from outside of New England, illustrating the success and continued need for a marketing presence further away from Maine's borders. These first-time visitors are also younger, less affluent, and more likely to be traveling with kids – all features that differentiate them from the traditional Maine visitor. Further, first-time visitors report higher ratings of Maine in terms of exceeding their expectations for a Maine vacation. An exploration of their views on these areas where Maine exceeded their expectations could reveal existing negative perceptions among those who haven't been to Maine.

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