

Recreational Hunter and Angler Market Report: Maine

Prepared for: Maine Office of Tourism and Department of Inland Fisheries & Wildlife

April 2015



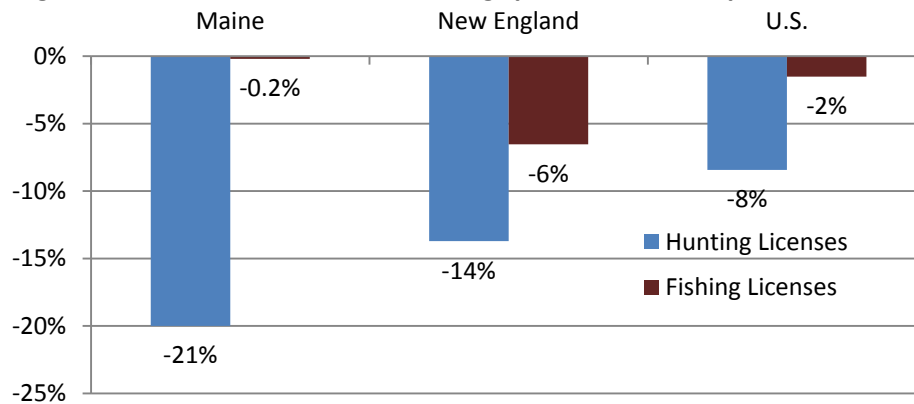
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This document is the third installment in a three-part series examining the economic contributions of hunting and fishing in Maine and the market potential for increased participation. The first report focuses on the economics of hunting in Maine. The second report focuses on the economics of fishing. This third report is a market analysis that looks at the preferences and amenities that attract sportsmen to hunting and fishing destinations in Maine and elsewhere.

Executive Summary

The number of sportsmen who come to Maine to fish and hunt, particularly hunters, is of concern due to the declining numbers over the past decade. In the most recent five-year period from 2009 through 2013, the change in numbers of licenses to hunt and fish in Maine has been mostly negative. Among nonresidents, Maine has lagged New England and the United States with a 20% drop in the number of hunting licenses, tags and permits (Figure E1). Conversely, there has been almost no change in non-resident fishing privileges sold in Maine, while New England and the U.S. have experienced a decline in sales.

Figure E1. Change in Maine's nonresident license, tags permits and stamps sold from 2009 to 2013.



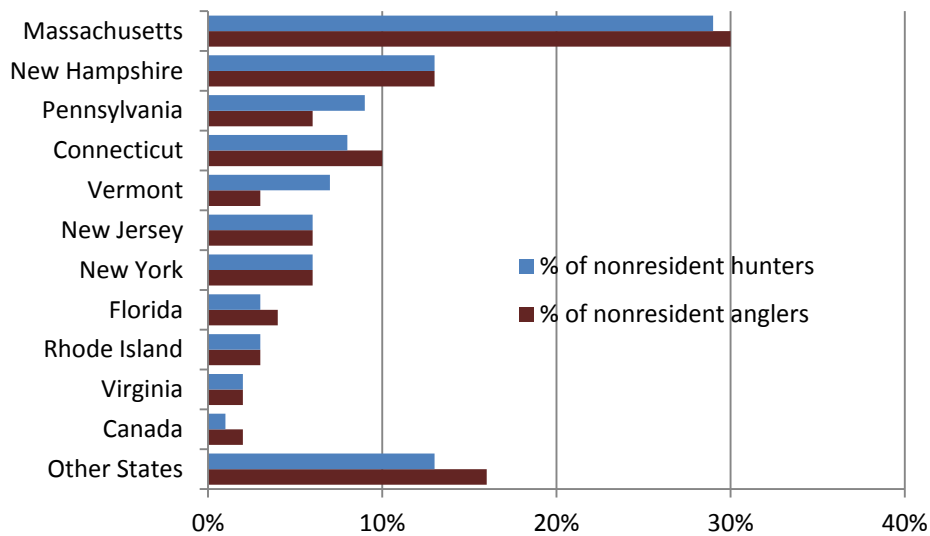
Maine competes with many other states, in the Northeast and elsewhere, to attract and retain both resident and nonresident sportsmen. Learning about the preferences of sportsmen provides insights for marketing efforts designed to appeal to sportsmen. Surveys of Maine licensed sportsmen along with hunters and anglers from throughout the Northeast were conducted to learn details about their sporting activity, their preferences, and the factors that impact their choice of destinations.

Throughout this report, two groups of sportsmen are characterized.

- 1) **Maine's Licensed Hunters and Anglers:** Resident and nonresident sportsmen and women who hunted or fished in Maine between 2009 and 2013, and
- 2) **Traveling Hunters or Anglers:** Hunters and anglers within Maine's market area, primarily the Northeast, who have travelled beyond their home state to hunt or fish but who have not hunted or fished in Maine.

Where do Maine's visiting sportsmen and women live?

Reflecting the regional nature of Maine's market for visiting sportsmen, Massachusetts and New Hampshire top the lists of nonresident hunters and anglers in 2013. In all, the New England states account for approximately 60% of visiting sportsmen while the Pennsylvania, New York and New Jersey contribute approximately 20% of sportsmen, combined. The remaining 20% to 25% come from other mid-Atlantic and Southeastern states. Canadian visitors account for fewer than 2% of all visiting sportsmen.

Figure E2. State of residence for Maine nonresident hunters and anglers in 2013.***What is Maine's place in the traveling sportsmen market?***

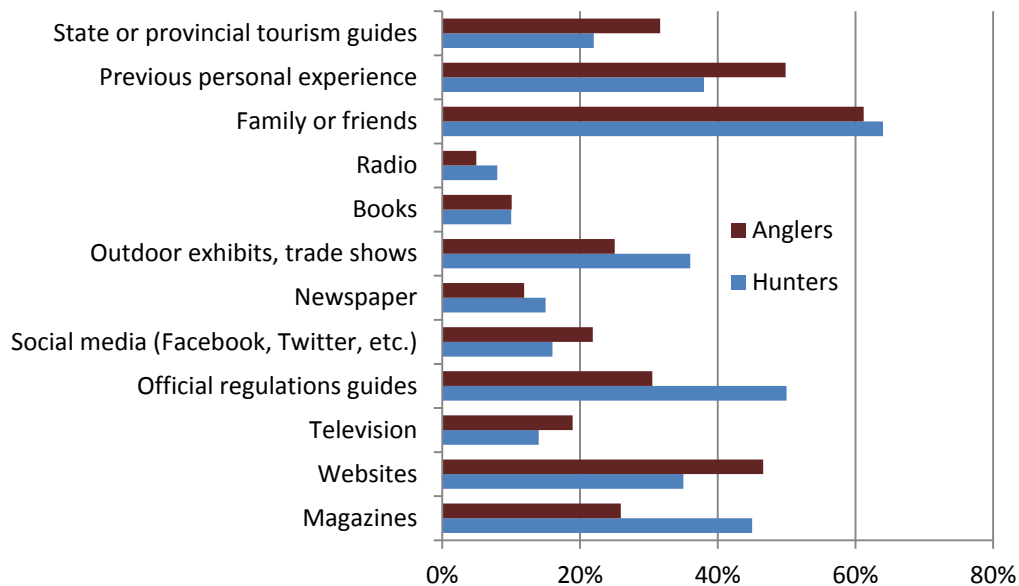
US sportsmen and women routinely travel between states to engage in hunting and fishing. These sportsmen represent the target market for increasing the sale of nonresident hunting and fishing licenses in Maine. The significance of each state depends on the total number of sportsmen who live there, their propensity to travel, and Maine's penetration into that traveling market. Findings indicate that, given the size of the traveling sportsmen market within Maine's primary "source" states for nonresident hunters and anglers, there remains growth potential to increase the state's level of penetration within that market.

Which locations are perceived to be the "Best" destinations to hunt and fish?

When asked to consider a number of specific hunting and fishing destinations and their associated characteristics such as climate, safety, pricing, and amenities, Maine's licensed resident and nonresident sportsmen almost exclusively identify Maine as among the "Best" amid several competing destinations. Among traveling anglers who have never fished or hunted in Maine, the results are somewhat different. Within that group, Maine ranks highest for safety and attractive natural setting compared to other destinations.

Where do sportsmen turn for information about places to hunt and fish?

The most popular sources of information for Maine licensed sportsmen about places to visit for hunting or fishing are family and friends, web sites and personal experience. The same is mostly true for traveling anglers and hunters, although they are much more likely to use outdoors exhibitions and trade shows to learn about new places to visit than Maine's current licensed sportsmen (Figure E3).

Figure E3. Sources of fishing and hunting information used by traveling sportsmen.***What defines a perfect hunting or fishing spot?***

Proximity of lodging (their own accommodations or paid overnight accommodations) to their hunting or fishing spot is cited as important by all hunters and anglers, whether they have visited Maine or not. Somewhat paradoxically, Maine's licensed and traveling hunters also list open land and remoteness as the top two important factors they look for in their ideal site. Similarly, Maine's licensed resident and nonresident anglers seek out natural beauty of an area as well as a spot that is remote but offers easy access. It is interesting to note that the feeling of safety and security, while high for all respondents, is cited as one of the two top site characteristics by the Traveling sportsmen group.

Abundance of game and live sightings of their target animal are cited by the overwhelming majority of hunters of all types (Maine licensed and Traveling hunters) as the top two sport-specific factors influencing the decision to hunt in Maine. The chance to catch many fish and the presence of native fish populations are cited by three quarters of all anglers (Maine licensed and Traveling hunters) as important factors influencing the decision to fish.

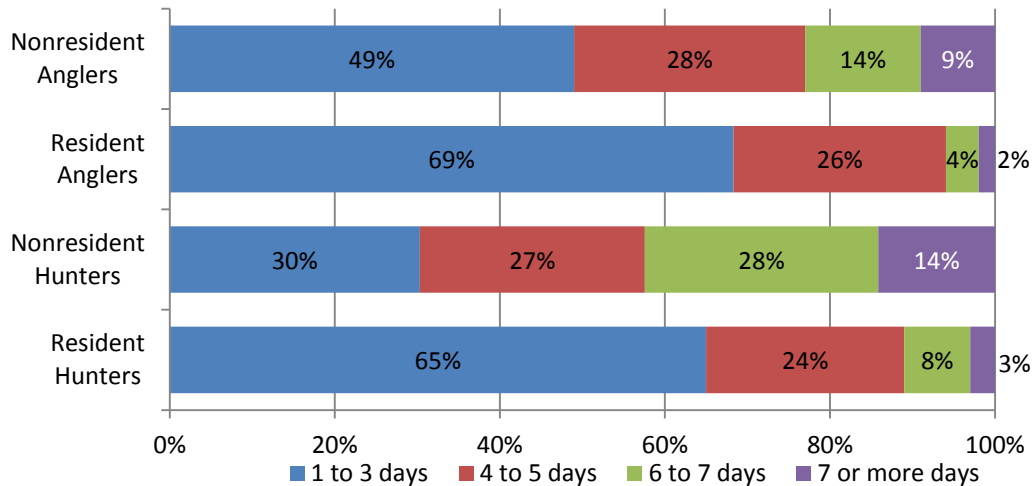
When hunters and anglers do travel to Maine, what are their trip characteristics?

In general, Maine's licensed hunters and anglers go hunting and fishing with other friends or family members. During trips when hunting and fishing occurred, Maine's licensed sportsmen and Traveling sportsmen alike spent time enjoying the scenery, sightseeing, and relaxing. A majority are satisfied with their trip, are highly likely to come to Maine again to hunt and fish, and to recommend hunting and fishing to others.

Maine's licensed resident hunters and anglers most commonly spend one night away from home during multi-day trips (Figure E4). They typically utilize unpaid lodging for their overnight accommodations. It is more common for Maine's licensed nonresident and Traveling hunters

and anglers to spend a larger period of time away from home. Those traveling sportsmen rely on paid lodging for their overnight accommodations.

Figure E4. Trip length among Maine’s licensed hunters and anglers.



What activities compete for free time among sportsmen?

Understanding the perceptions and expectations of hunters and anglers who actively hunt and fish, whether in Maine or not, provides critical information for the development of an action plan aimed at increasing the number of sportsmen and women who come to the state. It is also important to understand why active sportsmen might take a break or withdraw from hunting or fishing.

Sportsmen cite a variety of reasons for leaving or taking a hiatus from hunting or fishing. The most commonly cited reasons are: not enough time, takes time away from family, and other obligations such as work or family. Sportsmen may also be motivated to take a hiatus because others close to them prefer or have a commitment to other activities.

Insights for growing Maine’s population of hunters and anglers

Encouragingly, both sports have shown slight growth, either nationally or regionally. And, outside research indicates that there are likely more people who identify themselves as hunters or anglers in any given year than there are licenses sold, often the measure of participation within a sport.

Given that, recommendations from this outside research suggests that recruitment efforts prompting new hunters or anglers interested in the sport to take up the sport should be partnered with retention efforts prompting hunters and anglers taking a hiatus to return to the sport.¹ Hunters and anglers might need reminding about the fun and relaxation that can be had with family and friends when hunting or fishing.

¹ American Sportfishing Association, Responsive Management, Oregon Department of Fish and Wildlife, and Southwick Associates. 2013. Exploring Recent Increases in Hunting and Fishing Participation. U.S. Fish & Wildlife Service Multi-state Conservation Grant F12AP00142.

Table of Contents

Executive Summary.....	ii
Table of Contents.....	vi
Chapter 1 Introduction and background	8
<i>Maine sportsmen population trends</i>	8
<i>Data collection</i>	12
<i>Methodology</i>	13
<i>Maine’s sportsmen and Traveling sportsmen: Defining the groups</i>	14
Chapter 2 Identifying the competition when sportsmen travel to hunt or fish	16
<i>Frequency of out-of-state trips</i>	17
<i>Which state or province visited?</i>	18
<i>Preferred state or province</i>	20
<i>Ideal destinations</i>	22
Chapter 3 What are hunters and anglers looking for in a hunting or fishing spot?	43
<i>Sport specific factors</i>	43
<i>Service specific factors</i>	48
<i>Site specific factors</i>	51
Chapter 4 Information sources for trip planning	55
<i>Information sources</i>	55
<i>Top magazines, TV shows, and websites</i>	58
Chapter 5 Maine’s hunter or angler	63
<i>History with hunting or fishing in Maine</i>	63
<i>Personal reasons for hunting or fishing</i>	66
Chapter 6 Targeting traveling sportsmen in Maine’s market region.....	69
<i>Maine’s penetration into the traveling hunter and angler market</i>	72
<i>Geographic distribution of the Nation’s traveling hunters and anglers</i>	72
<i>Similarity index of the Nation’s hunters and anglers to Maine’s sportsmen</i>	78
Chapter 7 Trip characteristics when hunting and fishing occurred.....	80
<i>Travel party size and companions</i>	80
<i>Other activities</i>	87
<i>Location visited by traveling sportsmen</i>	91

<i>Trip Length</i>	94
<i>Accommodations</i>	96
Chapter 8 Trips utilizing a Lodge or Guide	100
<i>Lodging information</i>	100
<i>Lodging type</i>	101
<i>Lodging meals</i>	102
<i>Lodging services</i>	103
<i>Non-lodging services</i>	104
<i>Similarity index of the Nation’s hunters and anglers to Maine’s sportsmen who stayed at a lodge</i> ...	105
<i>Sources of information about guide services</i>	107
<i>Booking your guide</i>	109
Chapter 9 Satisfaction with the experience.....	110
<i>Overall satisfaction</i>	110
<i>Likelihood of hunting or fishing in Maine in the future</i>	113
<i>Likelihood of recommending Maine hunting or fishing to others</i>	115
Chapter 10 Key Insights	116
<i>Insights from the Maine licensed and Traveling sportsmen surveys</i>	116
<i>Insights gained from other research about hunter and angler recruitment and retention</i>	117
Index of Tables	119
Index of Figures.....	126

Chapter 1 Introduction and background

In 2014, the Maine Office of Tourism and the Department of Inland Fisheries and Wildlife (DIF&W) partnered with Southwick Associates to implement a three part study of existing and potential hunters and anglers. There were two primary goals to this work:

1. To examine the characteristics of resident and nonresident hunters and anglers in Maine, including statewide and regional activity as well as trip characteristics such as species sought, trip duration, purpose, destination, lodging and amenities sought.
2. To identify potential new recruits to Maine's population of sportsmen and women. New recruits are identified as individuals who are residents of other states and who travel beyond their home states to hunt or fish, but do not currently travel to Maine.

Two companion reports focus on the first goal and their findings show the important contributions of recreational hunting and fishing on state and local communities as a result of generated recreation-related spending, which in turn supports and creates jobs and builds future investments in open spaces and recreational areas.² As a destination, Maine has a lot to offer its resident and visiting sportsmen, based on the survey of those who recreationally hunt and fish. However, trends in the numbers of resident and visiting sportsmen highlight areas of concern.

This report focuses on the second goal, the results of which will be used to understand Maine's position in the recreational hunting and angling market and aid efforts used to attract more hunters and anglers to the state.

Maine sportsmen trends

According to a report submitted by the Task Force to Examine the Decline in the Number of Nonresident Hunters, the number of paid nonresident license holders who travel to the state to hunt or fish has been in decline, falling from a high of 41,500 in 2002 to 27,900 in 2010.³ More recently, Maine has continued to experience a drop in the size of its licensed resident and nonresident hunter population over the last five years (Table 1-1). According to the U.S. Fish and Wildlife Service's historical hunting license data, the number of hunting license holders in Maine fell from 196,000 to 189,000 between 2009 and 2013, a drop of 3%. The whole of New England (Connecticut, Massachusetts, Rhode Island, Vermont, New Hampshire, and Maine) experienced similar declines, falling by 4% from 458,000 to 439,000 license holders. Conversely, the number of licensed hunters grew just slightly across the nation, increasing by 1% from 14.5 million to 14.6 million over the period.

² Hunting in Maine in 2013: A statewide and regional analysis of participation and economic contributions. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. September 30, 2014.

Fishing in Maine in 2013: A statewide and regional analysis of participation and economic contributions. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. December 30, 2014.

³ *Executive Summary: Report on the Resolve to Establish a Task Force to Examine the Decline in the Number of Nonresident Hunters*. 125th Maine State Legislature, Chapter 51, LD 792.

Table 1-1. Number of licensed hunters and licenses sold in the nation, New England, and Maine from 2009 to 2013 ('000s)

Recreational hunting	2009	2010	2011	2012	2013	% change (2009 & 2013)
Nationwide						
License holders	14,454	14,448	14,975	14,961	14,631	1%
Total licenses, permits, etc. sold	35,276	34,083	34,656	35,711	36,394	3%
Resident licenses	32,049	30,873	31,518	32,519	33,439	4%
Nonresident licenses	3,227	3,209	3,138	3,192	2,955	-8%
New England (CT, MA, RI, VT, NH, ME)						
License holders	458	456	455	446	439	-4%
Total licenses, permits, etc. sold	1,057	1,056	1,035	1,206	1,014	-4%
Resident licenses	933	936	922	1,085	907	-3%
Nonresident licenses	124	120	115	121	107	-14%
Maine						
License holders	196	196	193	191	189	-3%
Total licenses, permits, etc. sold	279	276	264	261	252	-10%
Resident licenses	234	233	224	224	216	-7%
Nonresident licenses	45	43	40	37	36	-21%

Source: U.S. Fish & Wildlife Service Historical hunting license data⁴

As the population of licensed hunters has dropped in Maine and New England, the number of license, permits, and tags sold has also fallen. The decline in the number of hunting privilege items sold to residents in Maine has shown a steady decline of 7% among residents (Table 1-1). The decline in the number of hunting privilege items sold to nonresidents has fallen by 21%. New England has again experienced declines in the number of privileges sold, but to a slightly lesser extent. Nationally, the number of privileges sold has increased in total, precipitated by a rise of 4% among resident licenses and a decline of 8% among nonresidents.

On the other hand, the number of Maine's licensed resident and nonresident angler population has shown growth over the last five years (Table 1-2). According to the U.S. Fish and Wildlife Service's historical fishing license data, the number of fishing license holders in Maine grew from 273,000 to 289,000 between 2009 and 2013, an increase of 6%. New England experienced similar growth in the number of fishing license holders. The nation, however, experienced a slight decline in the number of fishing license holders, falling 1% from 28.1 million to 27.9 million, over the period.

⁴ U.S. Fish & Wildlife Service, Wildlife & Sport Fish Restoration Program. Historical License Data Index. Available: <http://wsfrprograms.fws.gov/Subpages/LicenseInfo/LicenseIndex.htm>

Table 1-2. Number of licensed anglers and licenses sold in the nation, New England, and Maine from 2009 to 2013 ('000s)

Recreational angling	2009	2010	2011	2012	2013	% change (2009 & 2013)
Nationwide						
License holders	28,139	28,391	28,397	29,324	27,948	-1%
Total licenses, permits, etc. sold	36,628	36,263	36,295	37,578	35,986	-2%
Resident licenses	30,029	29,717	29,914	30,830	29,487	-2%
Nonresident licenses	6,599	6,547	6,381	6,748	6,499	-2%
New England (CT, MA, RI, VT, NH, ME)						
License holders	873	901	912	943	916	5%
Total licenses, permits, etc. sold	1,200	1,243	1,216*	1,283	1,181	-2%
Resident licenses	955	987	974	1,030	952	0%
Nonresident licenses	245	256	247	253	229	-6%
Maine						
License holders**	273	279	280	288	289	6%
Total licenses, permits, etc. sold	263	266	262	266	262	-1%
Resident licenses	186	185	185	188	185	-1%
Nonresident licenses	77	80	77	79	77	0%

Source: U.S. Fish & Wildlife Service Historical fishing license data⁵

* Rhode Island did not report in 2011.

** "License holders" includes lifetime license holders. This value can be larger than the Total license, permits, etc. sold which reflects only privileges issued during a license year, particularly when lifetime license holders do not purchase supplementary privileges during that year.

The number of license, permits, and tags purchased has not shown similar growth. Among residents, the number of fishing licenses, permits & tags items sold has experienced a decline between 2009 and 2013 but has fluctuated within that period (Table 1-2). Among Maine's nonresident anglers, the number of licenses, permits, and tags purchased has also shown fluctuation but no growth trend. Nonresident license sales in New England have dropped by 6%, falling from 245,000 to 229,000 during the period. Resident licensed sales in New England remained stable. Despite the downward trend over the period between 2009 and 2013, the pattern of fluctuation among fishing license holders is also evident at the national level.

During this same time frame, from 2009 to 2013, Maine experienced a sharp increase in the number of lifetime licenses sold, rising by 76% among resident anglers and 77% among resident hunters which helped to buoy the downward trend in other paid license sales. This surge in resident lifetime licenses likely does not stem solely from an influx of new resident hunters and anglers into the sport but also from sportsmen shifting from one license type to another. Nevertheless, the management process of revenue earned from the sale of lifetime licenses provides a level of dedicated funding each year for DIF&W.

⁵ U.S. Fish & Wildlife Service, Wildlife & Sport Fish Restoration Program. Historical License Data Index. Available: <http://wsfrprograms.fws.gov/Subpages/LicenseInfo/LicenseIndex.htm>

Recreational expenditures associated with fishing and hunting directly support wildlife management and conservation efforts through license purchases. Hunters and anglers also support a number of jobs, associated income, and other economic activity through equipment and trip-related purchases. Fluctuating populations of the nation's angler and hunters and their spending impact these efforts and economic contributions. These impacts are particularly important in rural or remote areas facing economic challenges and where other sources of income may be limited.

In fact, hunters are estimated to spend an average of \$1,150 each year on trip and equipment related items (Table 1-3). Anglers are estimated to spend an average of \$1,429 each year on their trip and equipment related items. Over the last decade, hunter spending in Maine has remained fairly stable when adjusted for inflation, with a slight increase in spending during 2006. Angler spending, on the other hand, has steadily risen in real, inflation-adjusted dollars.

Table 1-3. Average annual spending for hunters and anglers: 2001 – 2013 (constant \$2013)

	2001	2006	2011	2013*
Hunting				
National	\$2,080	\$2,115	\$2,553	
New England	\$955	\$1,620	\$2,148	
Maine	\$1,213	\$1,570	\$1,131	\$1,154
Fishing				
National	\$1,376	\$1,621	\$1,307	
New England	\$767	\$966	\$931	
Maine	\$714	\$698	\$1,116	\$1,429

*Data sources are the National Survey of Fishing, Hunting, and Wildlife Associated Recreation and the two companion reports "Fishing in Maine in 2013" and "Hunting in Maine in 2013" authored by Southwick Associates.

Maine's wildlife areas and fisheries draw thousands of resident and non-resident sportsmen to take a trip to hunt or fish each year. These sportsmen spend more than \$200 million on goods and services (Table 1-4). Their direct spending cycles through the Maine economy and multiplied as it cycles through the state's economy supporting full- and part-time jobs, labor income, and economic value added.

Table 1-4. Estimated direct and total economic contribution of hunter and angler spending in Maine in 2013

	Total Annual Expenditures	Employment	Labor Income	State GDP (Value Added)	Total Output
Hunting	\$231,623,247	3,430	\$115,625,414	\$191,649,185	\$338,730,639
Fishing (freshwater)	\$208,808,028	3,330	\$104,792,016	\$175,954,478	\$319,178,335

Sources: The two companion reports "Fishing in Maine in 2013" and "Hunting in Maine in 2013" authored by Southwick Associates.

Data collection

This research effort draws on the results of the two earlier reports of Maine's hunters and anglers and combines that information with new information.

For the two companion reports, Maine's licensed hunters and anglers took part in an online survey conducted in 2014. The sampling frame for the survey was developed using historical license sales data provided by Maine's Department of Inland Fisheries and Wildlife (DIF&W) and included all persons who purchased a license, hunting or fishing, between 2009 and 2013. The sampling frame was narrowed to hunting and fishing license records that included an email address (Table 1-5).⁶ The survey of license buyers was implemented by sending an email invitation to all persons fitting those criteria.

Table 1-5. Target audience size for Maine licensed hunters and anglers

	Maine's licensed hunters			Maine's licensed anglers		
	Residents	Nonresidents	Total	Residents	Nonresidents	Total
Original email list	42,858	24,351	67,209	62,793	52,044	114,837
Undeliverable addresses	10,880	8,740	19,620	8,923	4,311	13,234
Net mailout	31,978	15,611	47,589	53,870	47,733	101,603
Net complete responses	5,496	3,530	9,026	6,827	8,181	15,008
<i>Response rate</i>	<i>17%</i>	<i>23%</i>	<i>19%</i>	<i>13%</i>	<i>17%</i>	<i>15%</i>

The survey was structured to gather general hunting and angling information plus detailed spending and participation information by activity type and sub-type (i.e. hunting or fishing; open water fishing or ice fishing) and tourism region. To avoid respondent fatigue from repeating detailed questions, the survey was designed to dynamically adjust to ask detailed questions of each respondent about only one activity type and sub-type they pursued. Procedures were in place to ensure adequate sample sizes for each type of sportsmen from which to build participation and spending estimates. For more detailed descriptions of data collection and methodology, please refer to the two companion reports.⁷

This research effort also involved an online survey but targeted the general population of sportsmen in Maine's market area. The specific target audience was sportsmen and women within Maine's market area who traveled outside of their state or province of residence for the purpose of hunting or fishing within the last year. The sample frame was selected from the top ten states represented among Maine's licensed nonresident sportsmen and women (Table 1-6). These ten states account for 81% of licensed nonresident hunters and 79% of licensed nonresident anglers. Canadian sportsmen and women represent approximately 1% of all nonresident sportsmen but were included within the sample

⁶ Maine DIF&W license sales records include email addresses for approximately one-half of sportsmen who purchased a license in the past five years.

⁷ Hunting in Maine in 2013: A statewide and regional analysis of participation and economic contributions. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. September 30, 2014.

Fishing in Maine in 2013: A statewide and regional analysis of participation and economic contributions. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. December 30, 2014.

given geographical proximity to Maine and the potential to expand the state's penetration into the Canadian market.

Table 1-6. Geographical distribution of the sampling frame for the survey of traveling sportsmen and women.

– Connecticut	– New York	– Vermont
– Florida	– Ohio	– Virginia
– Massachusetts	– Pennsylvania	– Canada
– New Hampshire	– Rhode Island	

Methodology

The survey of traveling hunters and anglers was conducted on a sample provided by Survey Sampling International, who directed respondents to the online questionnaire produced and managed by Southwick Associates. The resulting sample included a small proportion of people who had previously hunted or fished in Maine. Those people were omitted from all analyses in this report to provide a focus on potential sportsmen who have not hunted or fished in Maine.

Table 1-7. Target audience size for traveling sportsmen panelists

	Traveling sportsmen panelists
Original email list	1,464
Undeliverable addresses	na
Net mailout	1,464
Net complete responses*	772
<i>Response rate</i>	<i>53%</i>

* Note: Only a subset of this response population (those who had not traveled to Maine) is included in this analysis.

The raw survey data in each of the response files underwent several procedures to produce a final data set for analysis that accurately represents the nation's sportsmen and Maine's potential visitors.⁸ The demographic distribution of the resulting sample of traveling sportsmen was compared to respondents in the U.S. Fish and Wildlife Service's (USFWS) National Survey of Fishing, Hunting and Wildlife-Associated Recreation from the same set of states who traveled outside of their home states to hunt and or fish. A comparison of the study sample relative to the USFWS population is shown in Table 1-8. A rake weighting procedure was used to account for any differences. With the calculated weights applied to the analysis, the final samples were accurately reflective of the population of sportsmen on the relevant demographic measures.

⁸ Additional detail is provided in the two companion reports for hunting and fishing about the demographic distributions of the audience versus the responding sample.

Table 1-8. Demographic distribution of the target population among the traveling sportsmen sample versus respondents

Demographic	<u>Hunters</u>		<u>Anglers</u>	
	Target Population ¹	Survey Respondents	Target Population ¹	Survey Respondents
<u>Age Group:</u>				
16 to 29	13%	31%	17%	28%
30 to 44	27%	45%	25%	38%
45 to 59	32%	14%	32%	19%
60 and over	28%	9%	25%	15%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>138</i>	<i>242</i>	<i>456</i>	<i>776</i>
<u>Gender:</u>				
Male	91%	73%	77%	57%
Female	9%	27%	23%	43%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>138</i>	<i>197</i>	<i>456</i>	<i>552</i>
<u>Household Income:</u>				
Under \$25,000	1%	11%	4%	13%
\$25,000 - \$49,999	9%	17%	21%	22%
\$50,000 - \$99,999	35%	47%	29%	47%
\$100,000 or more	55%	25%	46%	18%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>128</i>	<i>197</i>	<i>405</i>	<i>552</i>
<u>Region of Residence:</u>				
Florida	33%	32%	7%	29%
New England	27%	8%	21%	12%
Northeast	40%	60%	72%	59%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>138</i>	<i>188</i>	<i>456</i>	<i>660</i>

The USFWS 2011 National Survey of Fishing, Hunting, and Wildlife Associated Recreation was used to characterize the target population.

Maine's sportsmen and Traveling sportsmen: Defining the groups

As a companion piece, this research explores sportsmen perceptions of Maine and other locales as they define their actual and ideal destinations to hunt or fish. It also looks at specific sport-, service-, and site-related factors influencing the decision to hunt and fish. And, it analyzes the existing traveling sportsmen market and Maine's position with that market. The goal of this final part of the research effort is to better understand the characteristics of the sportsmen who might and who do hunt and fish in Maine in order to better appreciate the state's assets and opportunities to strengthen its resident and nonresident sportsmen population.

It is important to be cognizant of the terminology used throughout this report to refer to the various surveys. The following terminology will be maintained for consistency and comparison purposes when referring to survey results:

Maine's Licensed Hunters and Anglers

The Maine's licensed hunter or angler group is defined to include both licensed resident and nonresident sportsmen and women who hunted or fished in Maine. Occasionally, results distinguish between licensed *resident* sportsmen and licensed *nonresident* sportsmen.

Traveling Hunters or Anglers within Maine's market region who have not hunted or fished in Maine

The Traveling hunter or angler group is defined as nonresident hunters and anglers who reside within Maine's market region, and have traveled outside of their own state or province of residence to hunt or fish in the last year but have not traveled to Maine. Occasionally, results are reported separately for traveling anglers *who are US residents* versus traveling *Canadian* anglers. Sample sizes were not large enough to separate traveling hunters by residency.

These two groups are designed to be mutually exclusive in an effort to differentiate the two groups and to better understand the characteristic differences between them.

The remainder of this report is organized into two parts. The first part (Sections 2 through 6) explore sportsmen who take a trip to hunt or fish (including residents who travel inside Maine); where they live, where have they traveled previously to hunt or fish, what are their preferred or ideal destinations, what factors are most influential on their decision to hunt or fish, and what types of information do they use to learn about a destination. The second part (Sections 7 through 9) explore the mechanics of a trip in which hunting or fishing occurred; who came along, where did they stay, trip planning duration, and overall satisfaction with the Maine experience for those who did hunt or fish in Maine.

Part 1-

Section 2: Identifying the competition when sportsmen travel to hunt or fish

Section 3: What are hunters and anglers looking for in a hunting and fishing spot

Section 4: Information sources for trip planning

Section 5: Maine's hunter or angler

Section 6: Targeting traveling sportsmen within Maine's market region

Part 2-

Section 7: Trip characteristics when hunting occurred

Section 8: Trips utilizing a Lodge or Guide

Section 9: Satisfaction with the experience

A brief paragraph introduces the topic area explored and its importance to the research effort. Each chapter is then broken down into subsections which include summarized key points followed by the supporting tables.

Chapter 2 Identifying the competition when sportsmen travel to hunt or fish

It is important for the management and marketing of Maine's hunting and fishing to understand how these opportunities are perceived by sportsmen and how Maine compares with competing states. In this section, Maine's licensed sportsmen and women are compared to traveling sportsmen and women to identify the frequency with which they participate in hunting and fishing, where they went, and to learn how their perceptions of Maine's outdoor experience compares with other locations believed to be primary competitors to Maine.

Respondents to both questionnaires were asked to report recent hunting and fishing destinations, satisfaction with their choices, and preferred destinations. Presented with a list of potential hunting and fishing destinations, respondents were asked to select their preferred destination and indicate which was the "best" for select characteristics such as best hunting/fishing, best prices, etc.. Locations against which Maine was compared were selected in concert with the DIF&W and represent locations perceived to be Maine's competitors. For hunting these areas included:

1. New England States other than Maine (NH, MA, RI, VT, CT)
2. Mid-Atlantic States (NJ, NY, PA)
3. Colorado
4. Montana
5. Wyoming
6. Canada - New Brunswick, Nova Scotia, Prince Edward Island
7. Canada - Newfoundland and Labrador
8. Canada - Quebec

For fishing these destinations included:

1. New England states other than Maine (NH, MA, RI, VT, CT)
2. Mid-Atlantic states (NJ, NY, PA)
3. Florida
4. Montana
5. Louisiana
6. Canada - New Brunswick, Nova Scotia, Prince Edward Island
7. Canada - Newfoundland and Labrador
8. Canada - Quebec

Traveling hunters and anglers ranked the same locations as licensed hunters and anglers, and were also allowed to indicate three additional locations, including:

1. Other US state
2. Canada - other province
3. Other country

Frequency of out-of-state trips

- Maine's licensed *resident* sportsmen are most likely to hunt or fish within Maine; few choose to travel (Table 2-1 and 2-3). In contrast, licensed *nonresident* sportsmen and traveling sportsmen travel frequently and regularly travel to hunt and fish (Table 2-1 through 2-4). Over 80% of traveling hunters and over 70% of traveling anglers take trips outside their state or province to hunt or fish at least once per year.

Table 2-1. Maine's Licensed Hunters: Did you take any trips outside of your home state or province in the last 5 years where the primary reason for the trip was to go hunting (include all types of hunting)?

Response	Residents	Nonresidents
I have not hunted outside my home state or province	86%	17%
Yes, I have hunted outside my home state or province	14%	83%
Total	100%	100%
Respondents	5,425	3,447

Table 2-2. Traveling Hunters within Maine's market region who have not hunted in Maine: About how often do you hunt in locations outside of your home state or province?

Response	US/Canada Residents
More than once a year	36%
Once a year	47%
About once every other year	7%
Once every three or four years	6%
Less than once every five years	5%
Total	100%
Respondents	101

Table 2-3. Maine's Licensed Anglers: Did you take any trips outside of your home state or province in the last 5 years where the primary reason for the trip was to go fishing (include all types of fishing)?

Response	Residents	Nonresidents
I have not fished outside my home state or province in the last five years	86%	29%
Yes, I have fished outside my home state or province in the last five years	14%	71%
Total	100%	100%
Respondents	6,659	7,916

Table 2-4. Traveling Anglers within Maine’s market region who have not fished in Maine: About how often do you fish in locations outside of your home state or province?

Response	US Residents	Canada Residents
More than once a year	41%	37%
Once a year	31%	23%
About once every other year	16%	16%
Once every three or four years	5%	14%
Less than once every five years	6%	10%
Total	100%	100%
Respondents	451	79

Which state or province visited?

- Among Maine’s licensed sportsmen— people who are already coming here or who reside here, Maine and other New England states have been “destinations” for hunting and fishing (Table 2-5 and 2-7).
- When Maine’s licensed sportsmen do travel to places other than Maine, they report the New England states (other than Maine), Mid-Atlantic States, and “other” unidentified states as the most common destinations for both hunting and fishing. Similarly, traveling sportsmen also reported the New England states (other than Maine) and Mid-Atlantic States as primary destination locations (Table 2-6 and 2-8). Traveling hunters also reported hunting in Colorado, Wyoming and Montana as destinations. Traveling anglers who are *U.S. residents* commonly reported taking fishing trips to Florida, while *Canadian residents* mostly reported taking trips to other Canadian provinces.

Table 2-5. Maine’s Licensed Hunters: Have you visited any of the following locations in the last five years where the primary reason was to go hunting? (select all that apply)

Option	Residents	Nonresidents
New England States other than Maine (NH, MA, RI, VT, CT)	35%	48%
Mid-Atlantic States (NJ, NY, PA)	20%	21%
Colorado	6%	7%
Montana	7%	7%
Wyoming	5%	6%
Canadian Maritime (New Brunswick, Nova Scotia, Prince Edward Island)	6%	4%
Newfoundland and Labrador	2%	3%
Quebec	6%	5%
Other Canadian province	4%	6%
Other US state	34%	33%
Other country	2%	3%
Respondents	909	2,939

Table 2-6. Traveling Hunters within Maine’s market region who have not hunted in Maine: *Not including your home state, did you hunt in any of the following locations in the last 5 years? (check all that apply)*

Option	US/Canada Residents
Mid-Atlantic states (NJ, NY, PA)	25%
Maine*	0%
New England states other than Maine (NH, MA, RI, VT, CT)	35%
Colorado	15%
Montana	14%
Wyoming	16%
Other U S state	22%
Canada - New Brunswick, Nova Scotia, Prince Edward Island	8%
Canada - Newfoundland and Labrador	2%
Canada - Quebec	3%
Canada - other province	2%
Other country	0%
Respondents	102

* Note: The Traveling sportsmen group is defined to include only those who have not traveled to Maine to hunt or fish.

Table 2-7. Maine’s Licensed Anglers: *Have you visited any of the following locations in the last five years where the primary reason was to go fishing? (select all that apply)*

Option	Residents	Nonresidents
New England States other than Maine (NH, MA, RI, VT, CT)	42%	47%
Mid-Atlantic States (NJ, NY, PA)	15%	24%
Florida	17%	18%
Montana	5%	9%
Louisiana	0%	3%
Canada - Canadian Maritime (New Brunswick, Nova Scotia, Prince Edward Island)	4%	3%
Canada - Newfoundland and Labrador	2%	1%
Canada - Quebec	4%	4%
Canada - Other province	5%	6%
Other State	26%	31%
Other Country	8%	6%
Respondents	1,616	6,147

Table 2-8. Traveling Anglers within Maine’s market region who have not fished in Maine: Not including your home state, did you fish in any of the following locations in the last 5 years? (check all that apply)

Option	US Residents	Canada Residents
Mid-Atlantic states (NJ, NY, PA)	47%	25%
Maine*	0%	0%
New England states other than Maine (NH, MA, RI, VT, CT)	32%	16%
Florida	36%	17%
Montana	4%	9%
Louisiana	6%	4%
Other U S state	22%	6%
Canada - New Brunswick, Nova Scotia, Prince Edward Island	3%	38%
Canada - Newfoundland and Labrador	0%	23%
Canada - Quebec	4%	29%
Canada - other province	5%	53%
Other country	6%	5%
Respondents	451	79

* Note: The Traveling sportsmen group is defined to include only those who have not traveled to Maine to hunt or fish.

Preferred state or province

- Given the opportunity, traveling hunters within Maine’s market region say that Wyoming or Montana are their top locations they would prefer to hunt, followed by New England States other than Maine (Table 2-9). Traveling anglers *who are US residents* reported the Mid-Atlantic States and Florida as the top two locations they would prefer to fish in if they had the opportunity; traveling *Canadian* anglers would prefer to fish the Canadian Maritimes (Table 2-10).

Table 2-9. Traveling Hunters within Maine’s market region who have not hunted in Maine: Of the following locations, which one would you prefer to hunt in if you had the opportunity?

Response	US/Canada Residents
Mid-Atlantic states (NJ, NY, PA)	12%
Maine	10%
New England state other than Maine (NH, MA, RI, VT, CT)	13%
Colorado	4%
Montana	21%
Wyoming	22%
Other U S state	9%
Canada - New Brunswick, Nova Scotia, Prince Edward Island	1%
Canada - Newfoundland and Labrador	2%
Canada - Quebec	2%
Canada - other province	2%
Other country	0%
Total	100%
Respondents	102

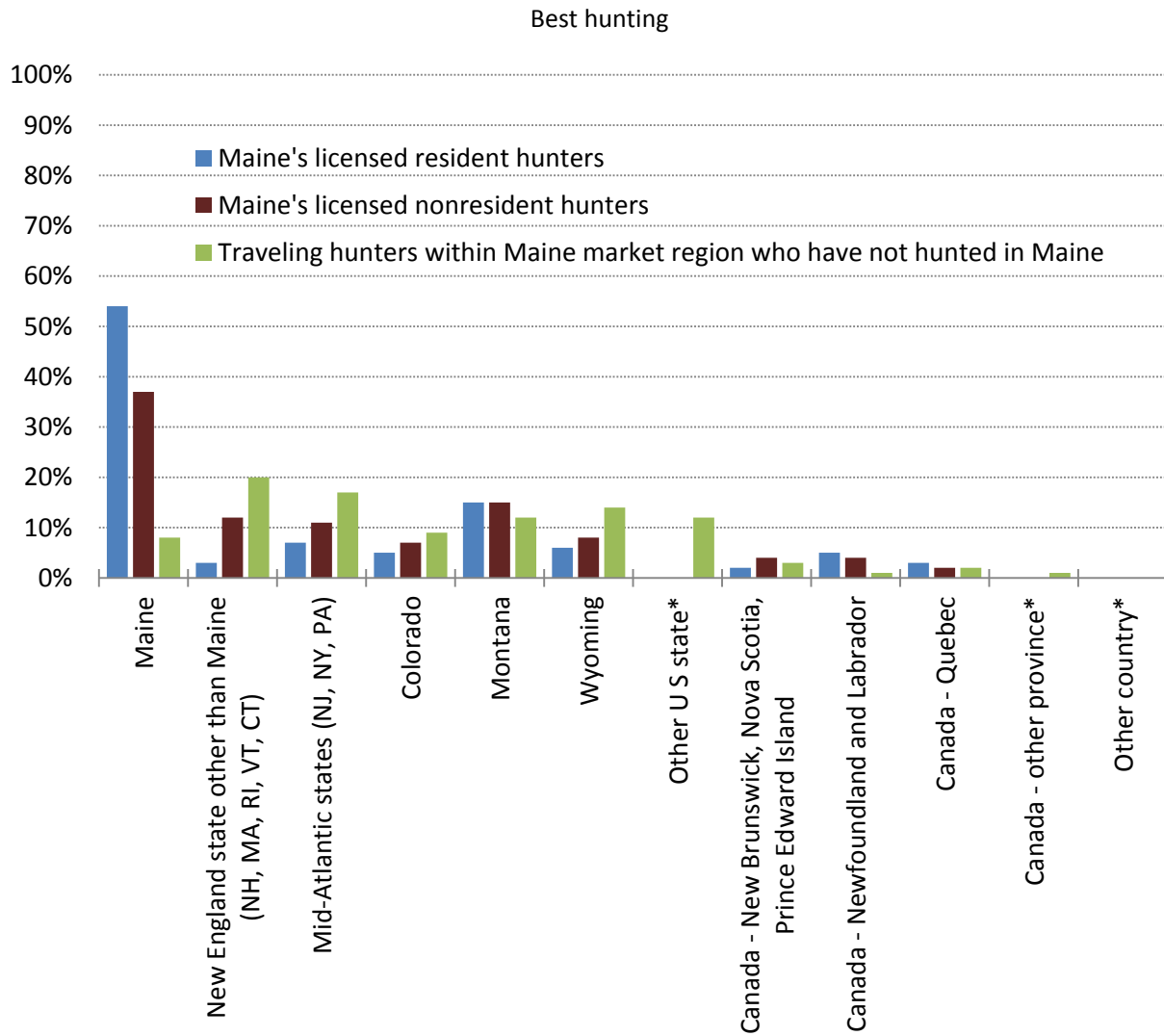
Table 2-10. Traveling Anglers within Maine’s market region who have not fished in Maine: Of the following locations, which one would you prefer to fish if you had the opportunity?

Response	US Residents	Canada Residents
Mid-Atlantic states (NJ, NY, PA)	19%	4%
Maine	14%	8%
New England state other than Maine (NH, MA, RI, VT, CT)	14%	5%
Florida	23%	9%
Montana	8%	3%
Louisiana	6%	1%
Other U S state	5%	2%
Canada - New Brunswick, Nova Scotia, Prince Edward Island	3%	21%
Canada - Newfoundland and Labrador	3%	11%
Canada - Quebec	1%	16%
Canada - other province	2%	19%
Other country	1%	1%
Total	100%	100%
Respondents	451	79

Ideal destinations

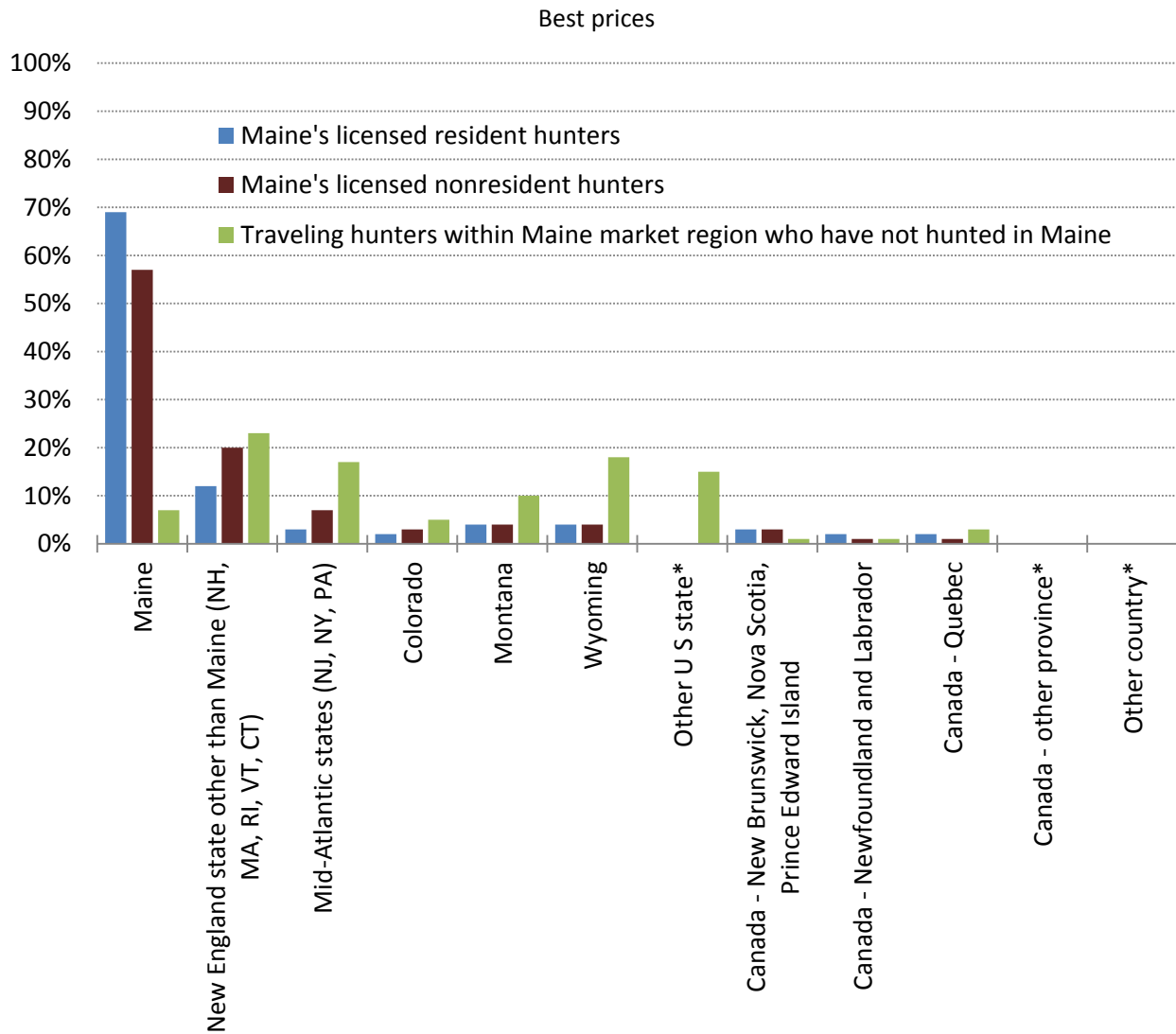
- Maine's *licensed* resident sportsmen – both hunters and anglers – consistently chose Maine as the “best” location to hunt and fish for all categories presented (Figure 2-1 through 2-20). Maine's licensed *nonresident* sportsmen ranked Maine as “best” among most categories, with the exception of some ancillary services; they reported other New England states as having the best transportation and dining/entertainment, with Maine and the Mid-Atlantic States being second and third, respectively. Maine's licensed *nonresident* anglers reported similar opinions, with other New England states providing the “best” transportation, dining/entertainment, followed by Maine in second place.
- Traveling hunters identified greater differences between preferred hunting destinations. For this group, Maine ranked highest for dining/entertainment, lodging, prices, and hunting. Wyoming ranks higher in safety, guide reputation and attractive setting and Colorado ranked higher in terms of fun outside of hunting. Other U.S. states and the Mid-Atlantic States came in higher than Maine for favorable climate and best transportation, respectively.
- Traveling anglers ranked Florida as offering the “best” in most categories. For fishing, the Mid-Atlantic States came in at a close second, and received the highest percentage of “best” votes for dining/entertainment. Maine ranked highest in only two categories: safety and attractive natural setting. For all other categories, it ranked among the lowest of all sites listed.

Figure 2-1. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Best hunting***



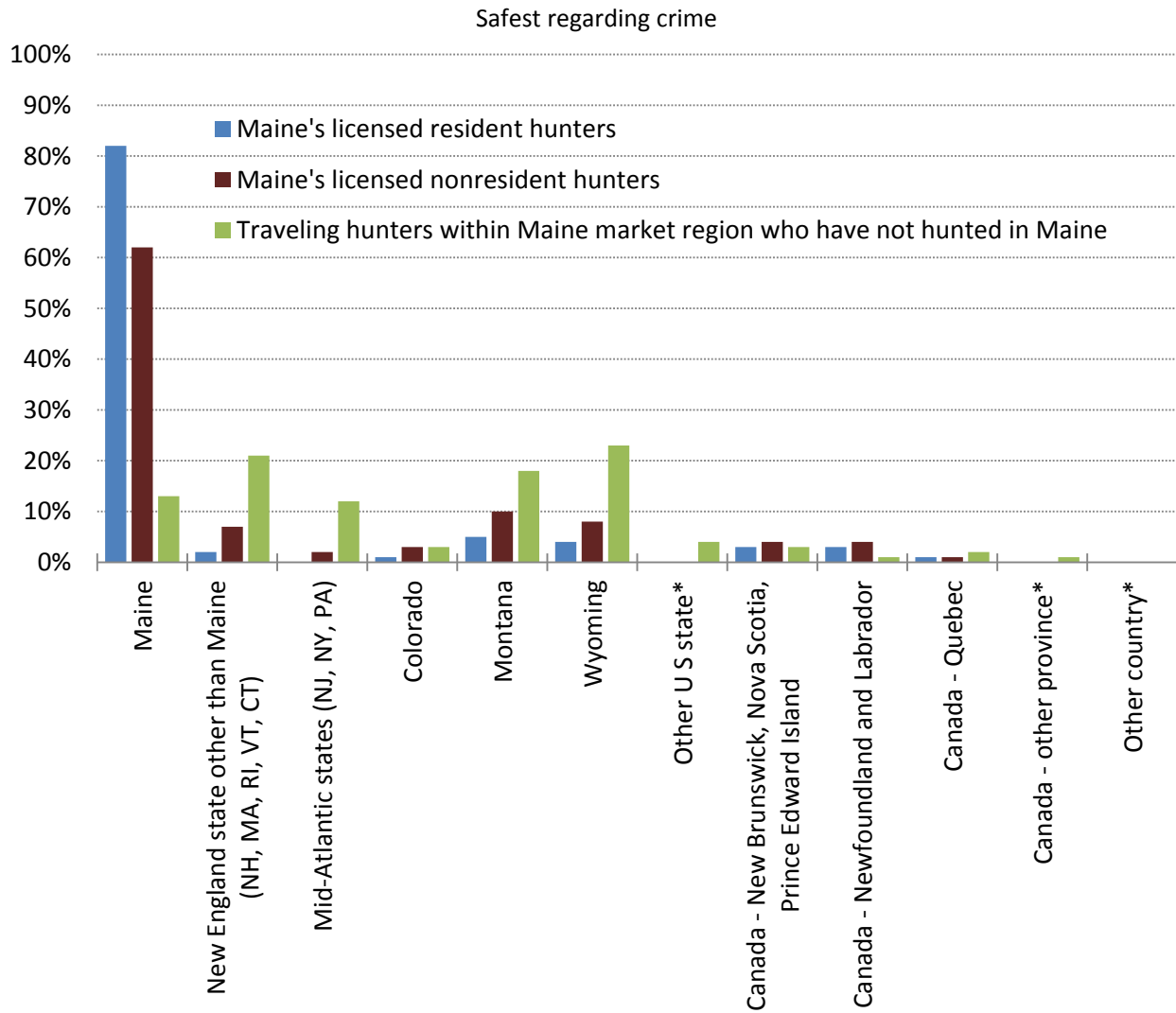
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-2. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Best prices***



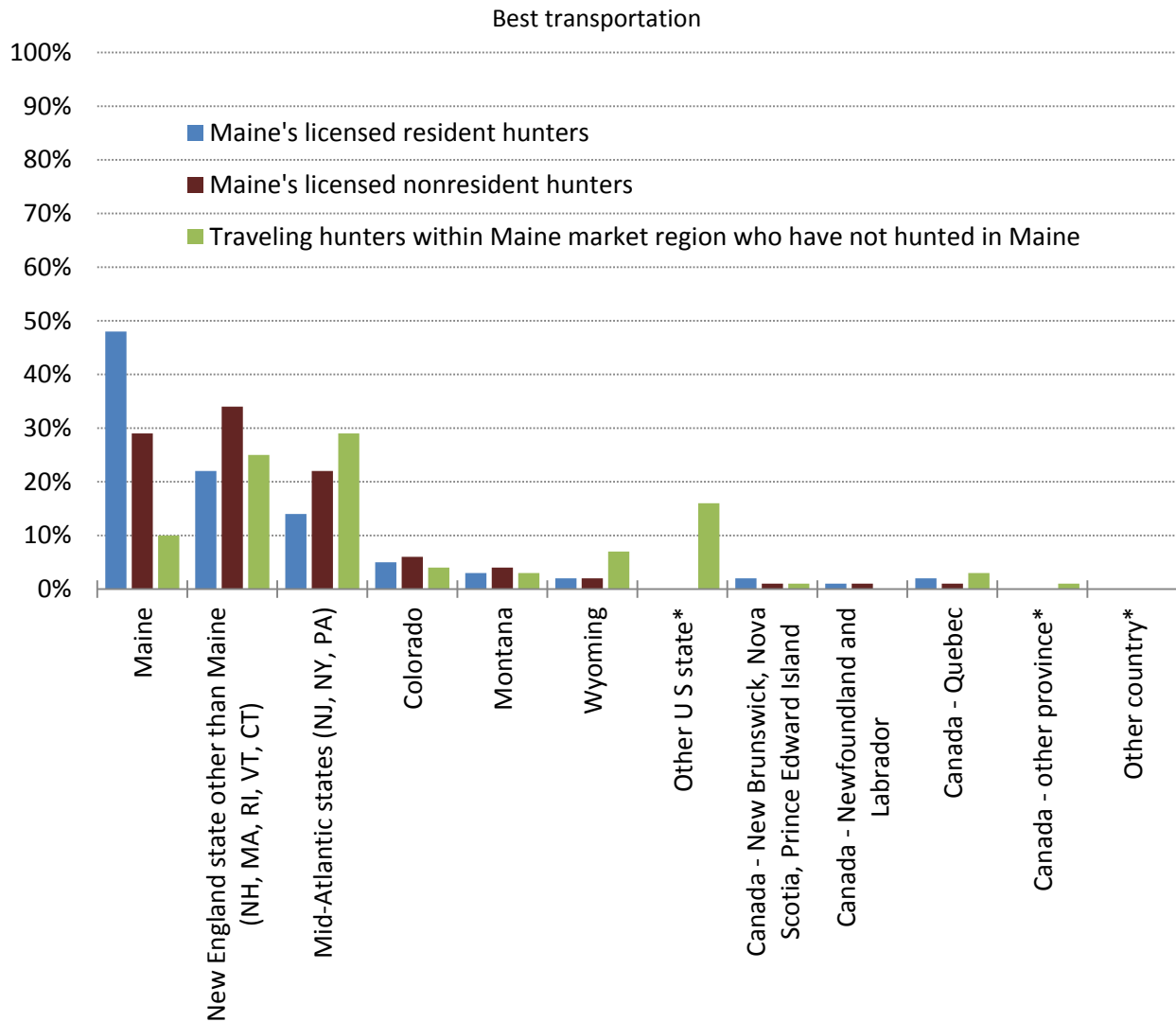
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-3. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Safest regarding crime***



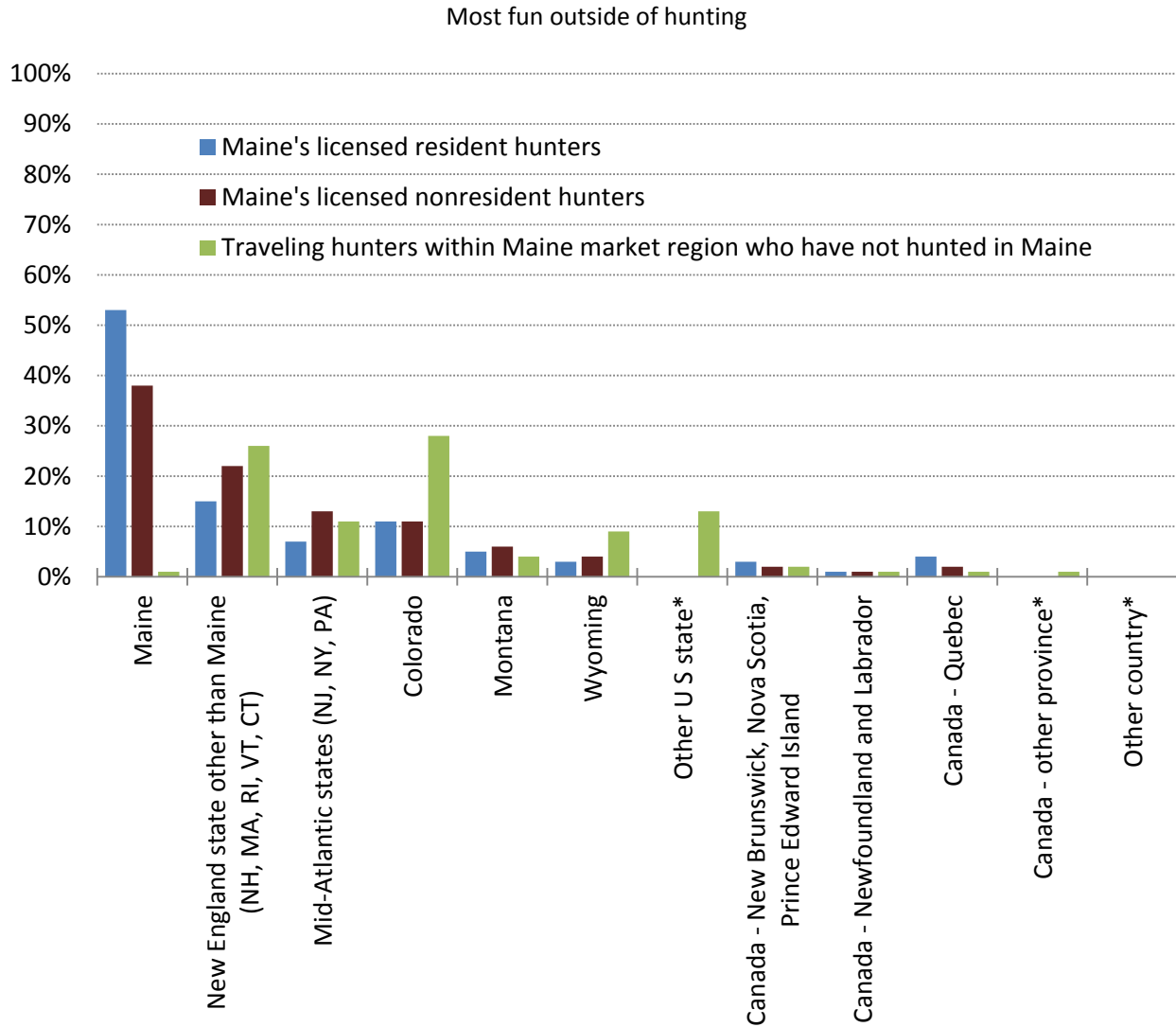
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-4. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Best transportation***



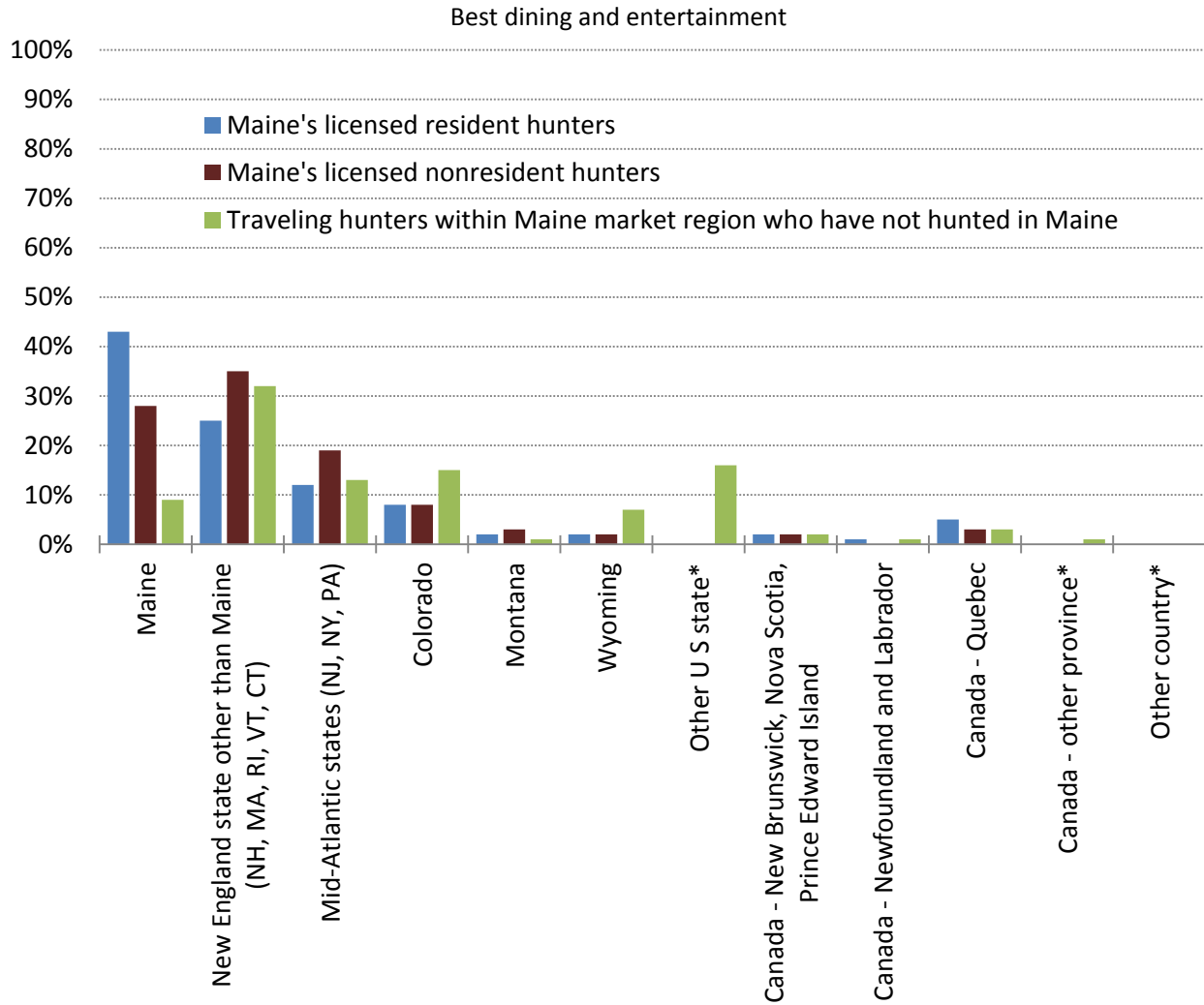
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-5. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Most fun outside of hunting***



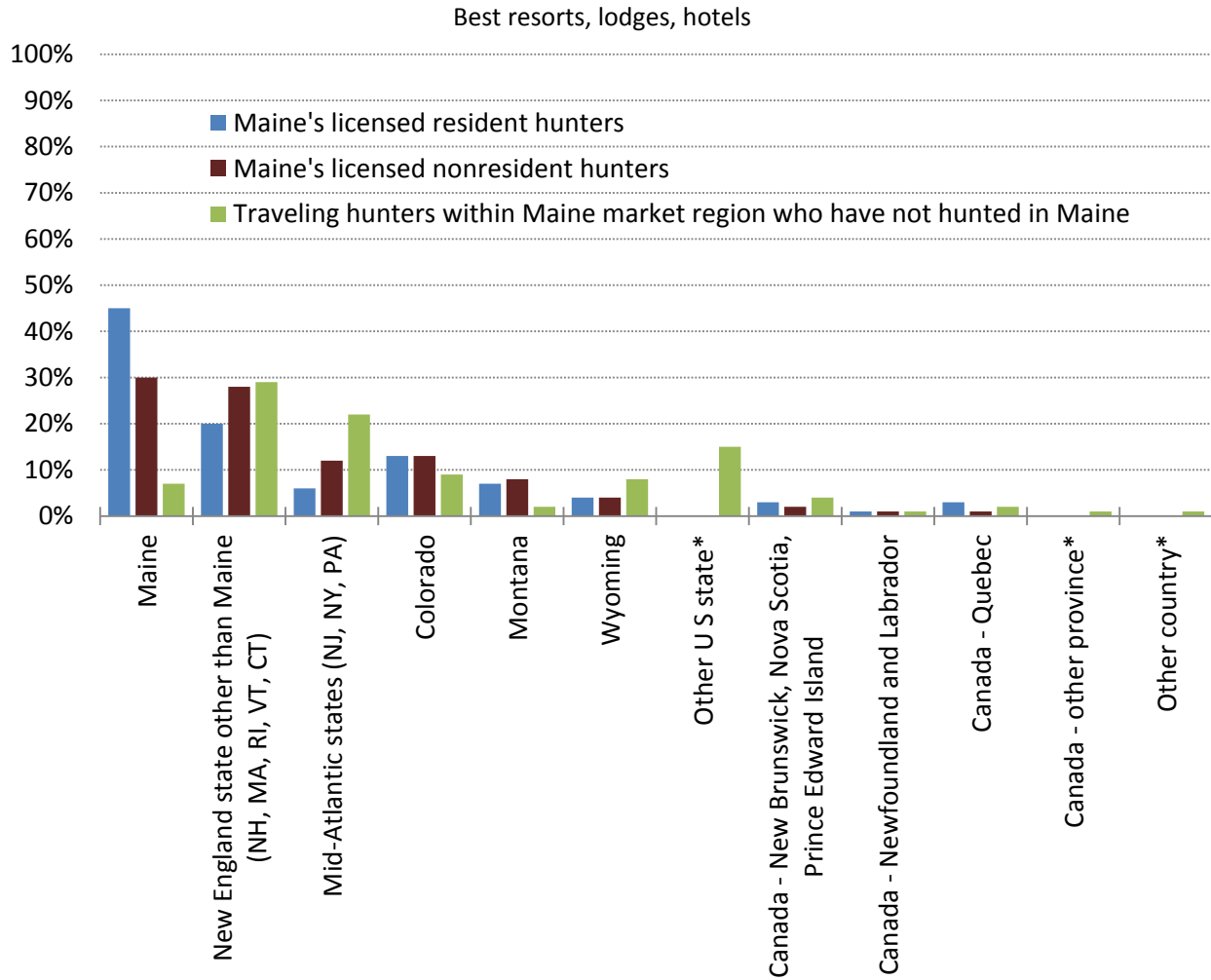
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-6. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Best dining & entertainment***



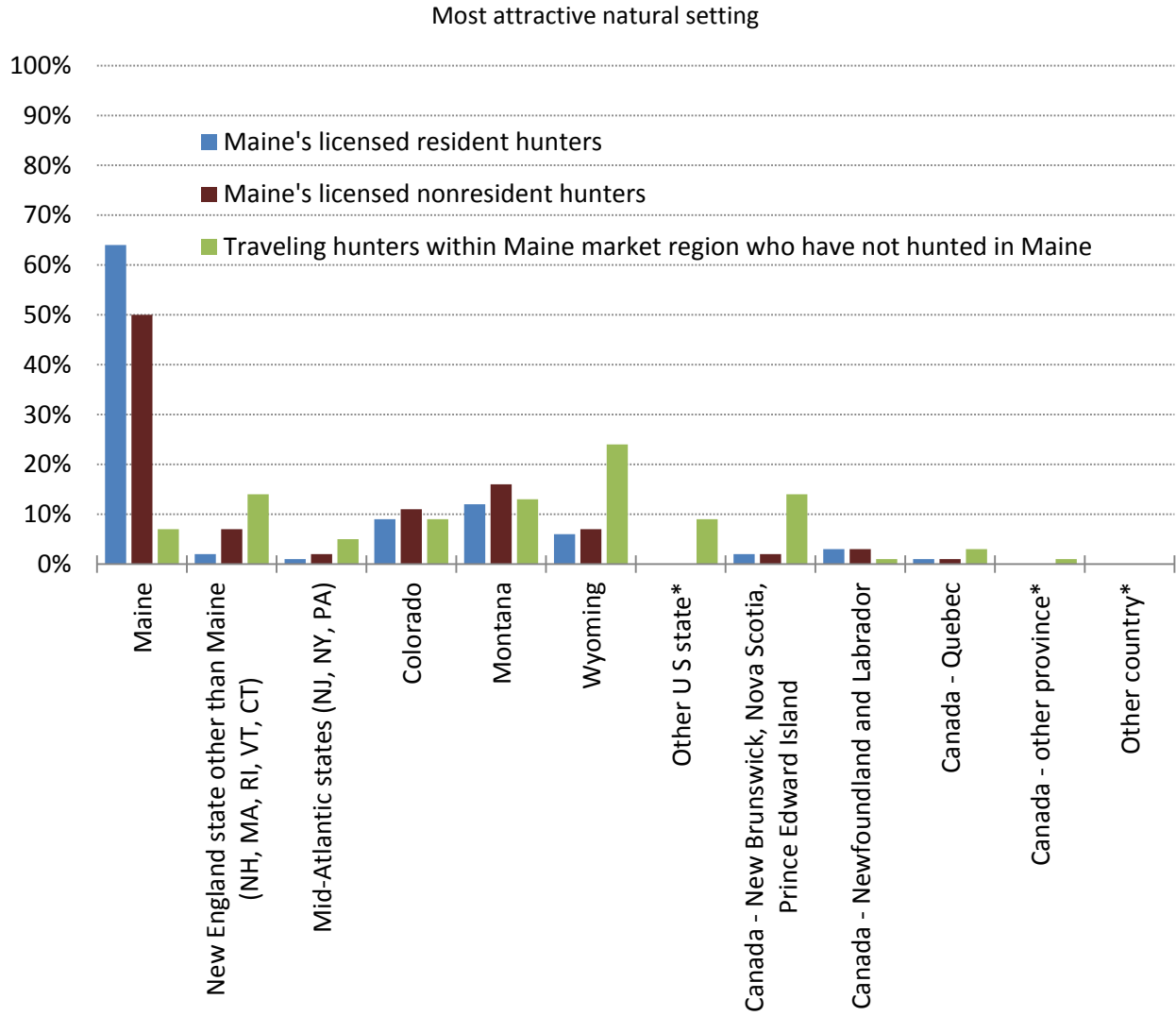
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-7. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Best resorts, lodges, hotels***



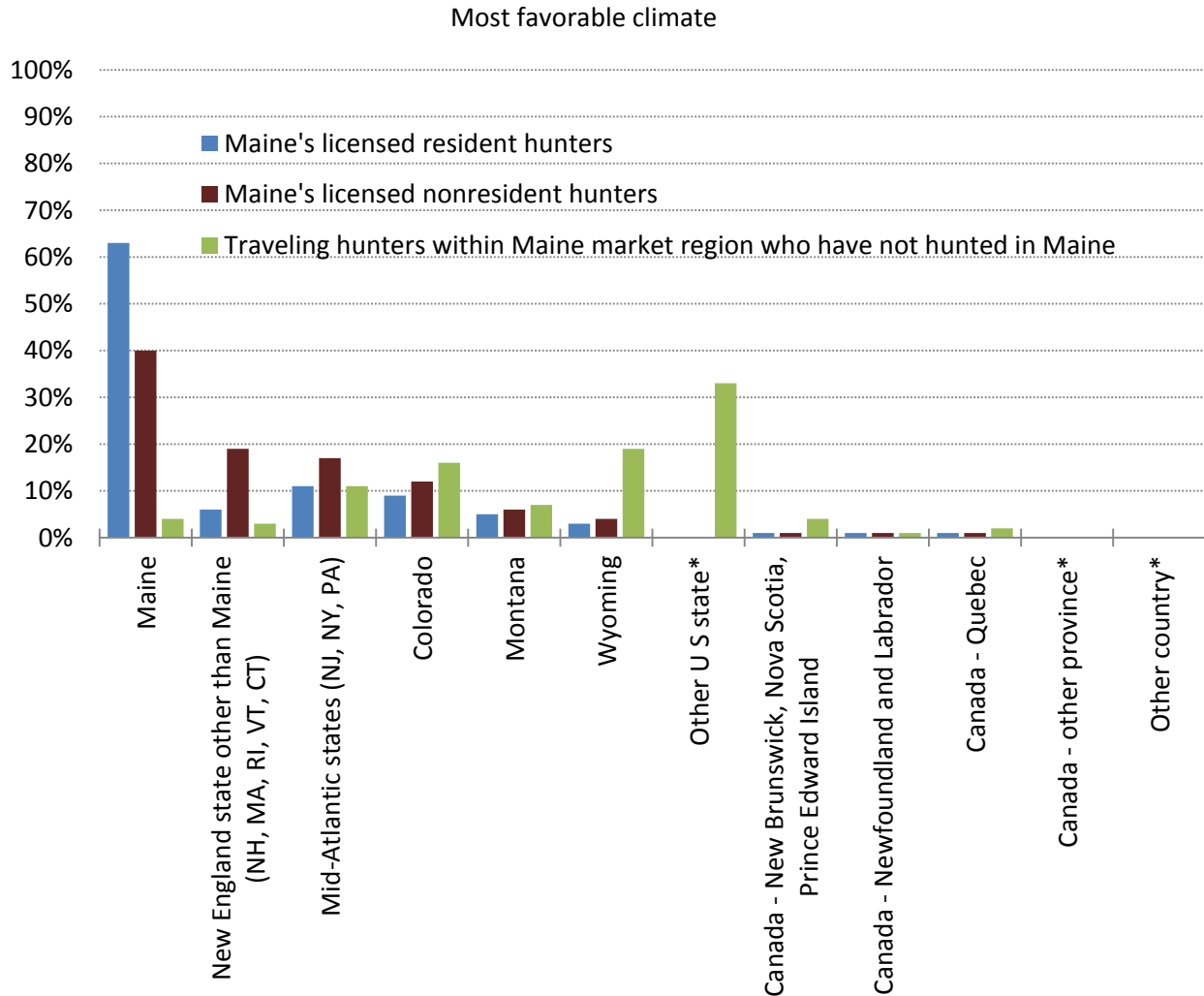
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-8. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Most attractive natural setting***



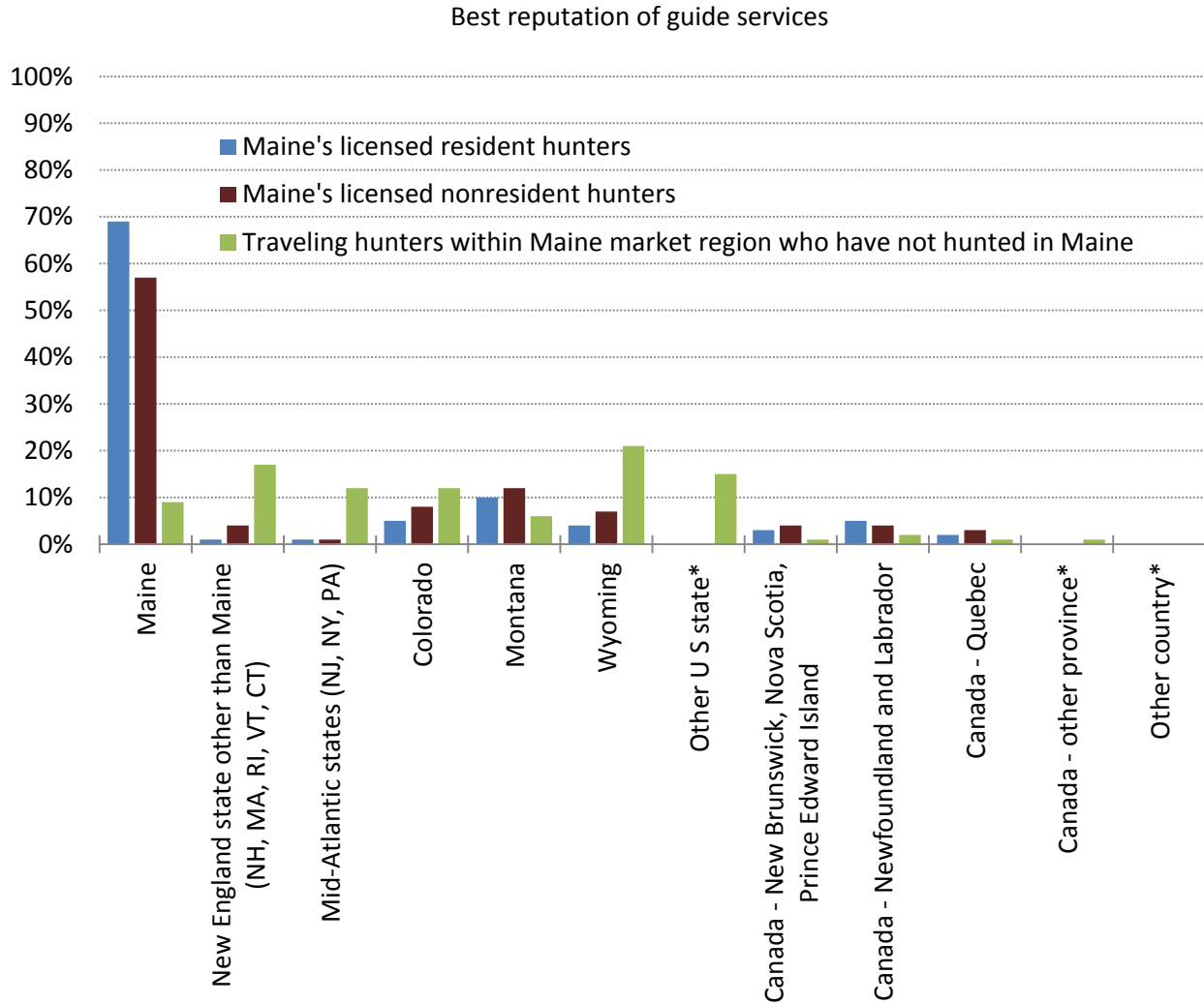
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-9. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Most favorable climate***



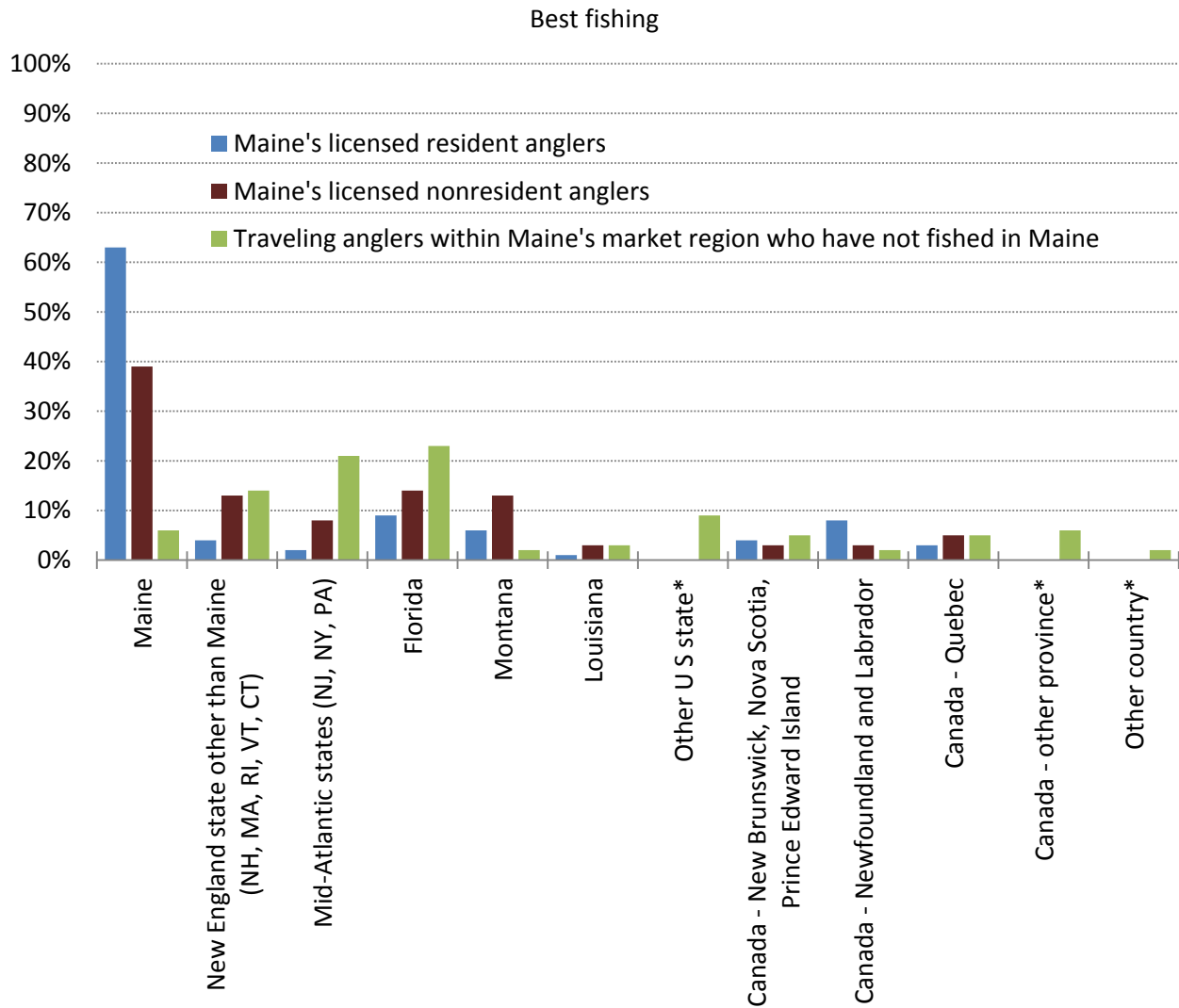
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-10. Maine’s Licensed and Traveling Hunters: *Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: **Best reputation of guide services***



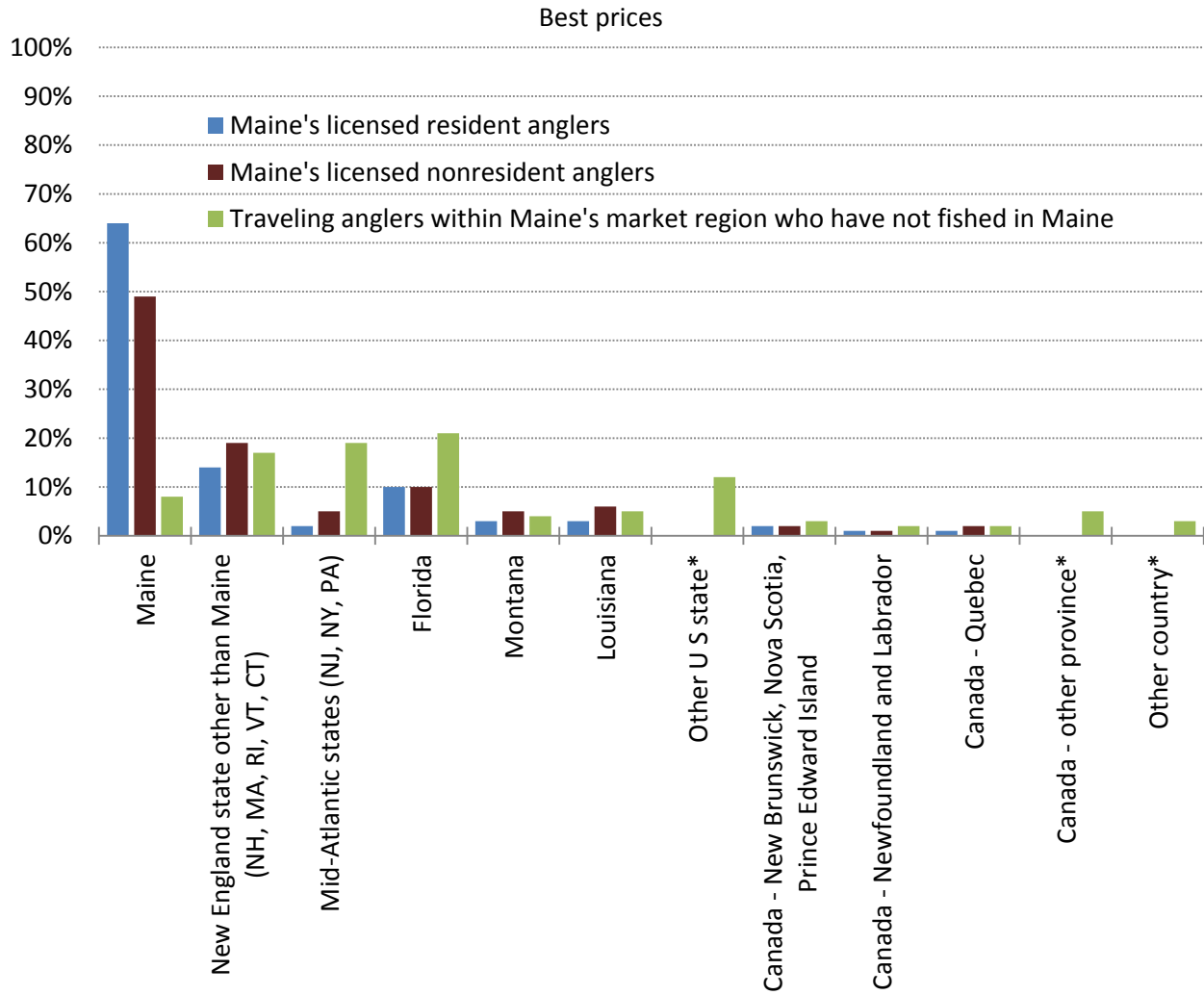
* Note: The question posed to Maine’s licensed hunters did not include these three possible selections.

Figure 2-11. Maine’s Licensed and Traveling Anglers: Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: *Best fishing*



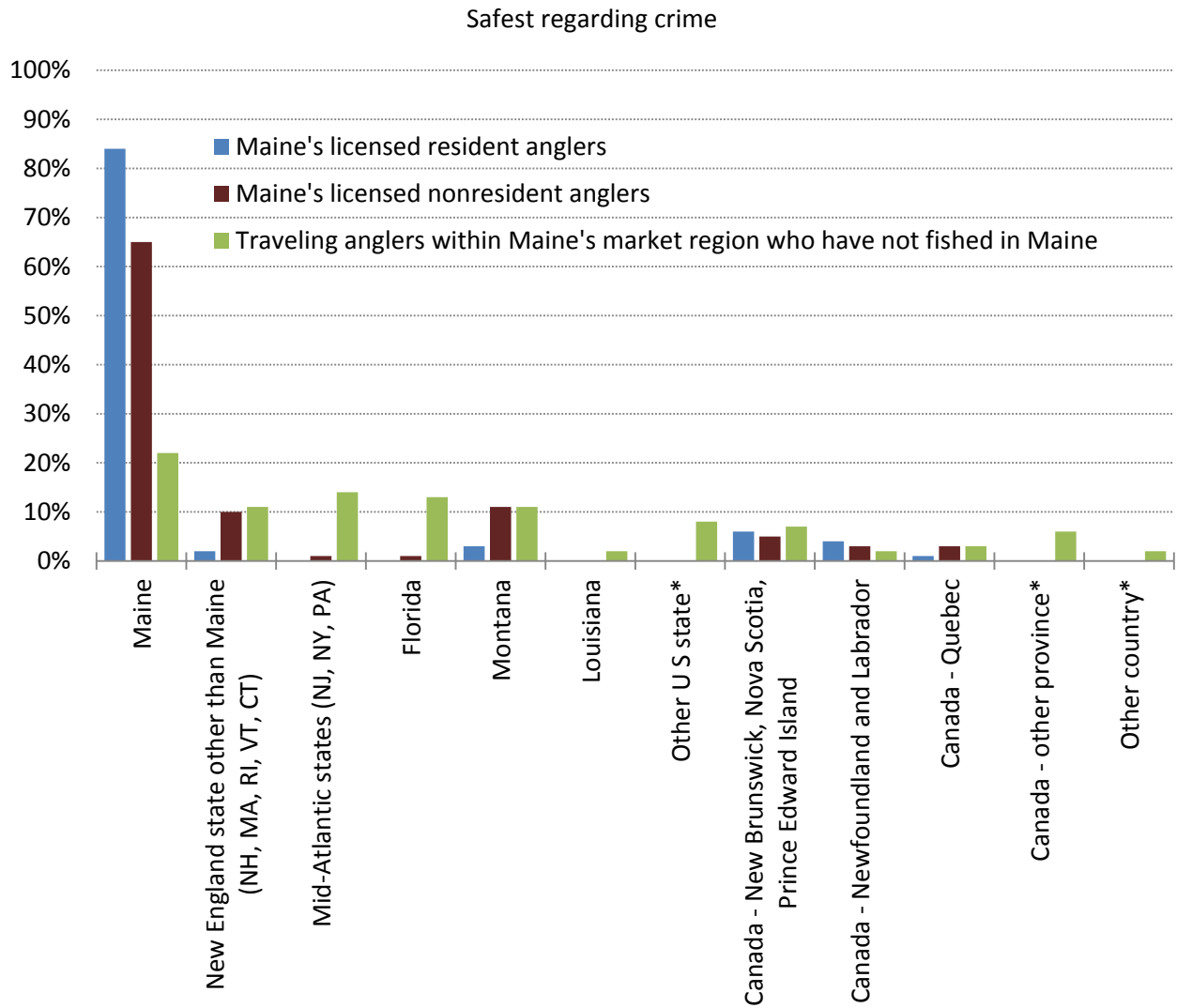
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-12. Maine’s Licensed and Traveling Anglers: Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: *Best prices*



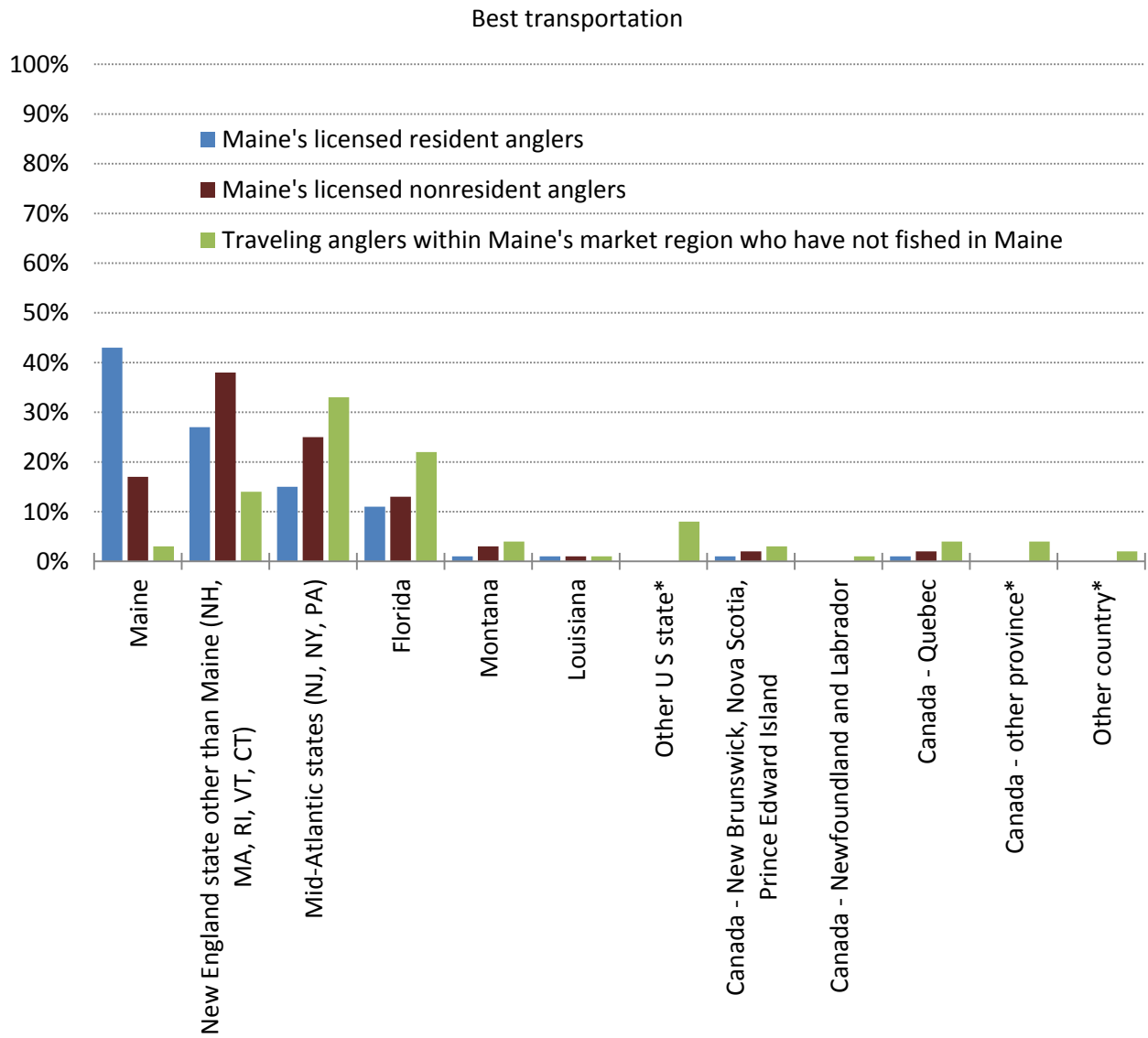
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-13. Maine’s Licensed and Traveling Anglers: *Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: **Safest regarding crime***



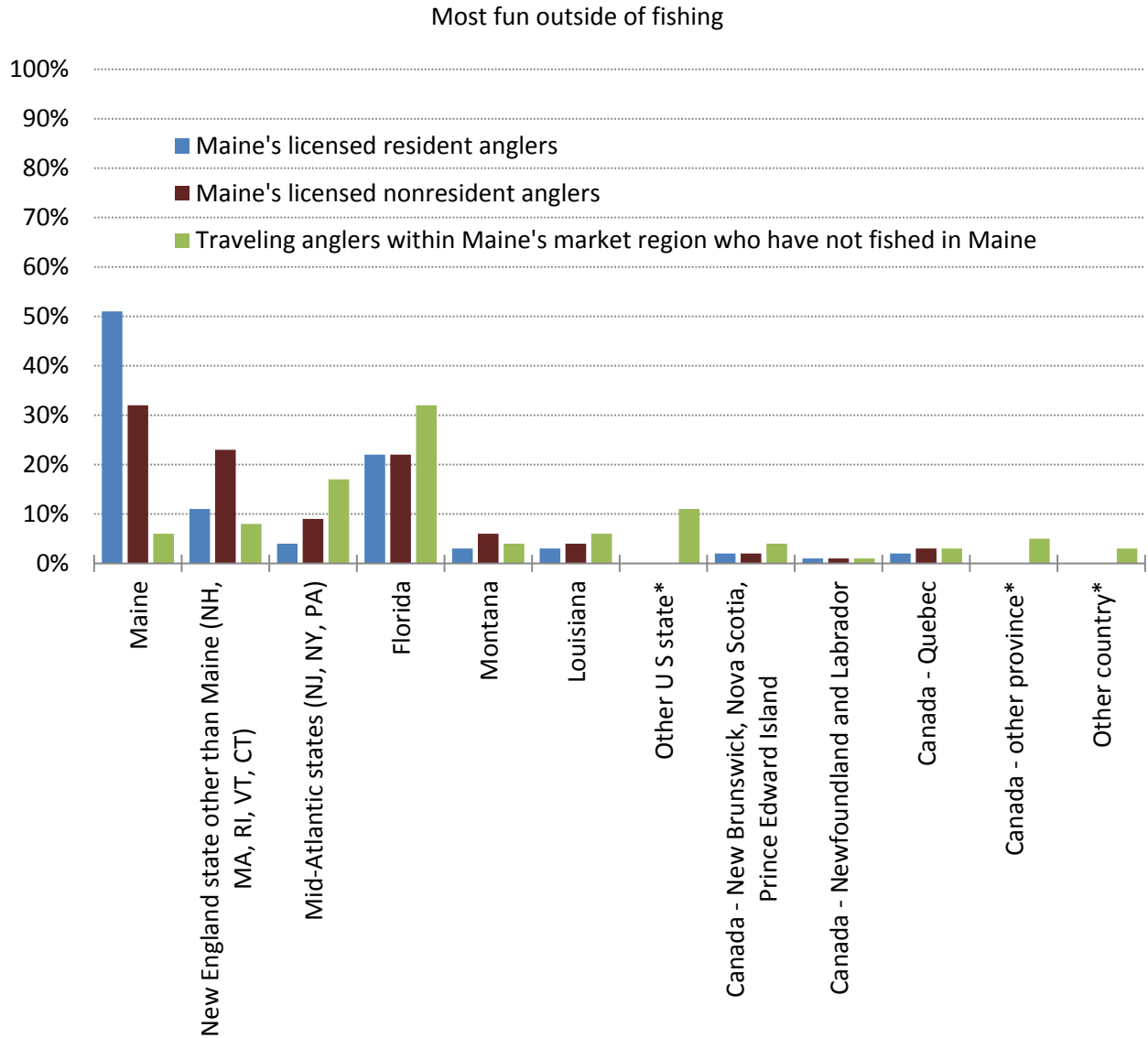
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-14. Maine’s Licensed and Traveling Anglers: *Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: **Best transportation***



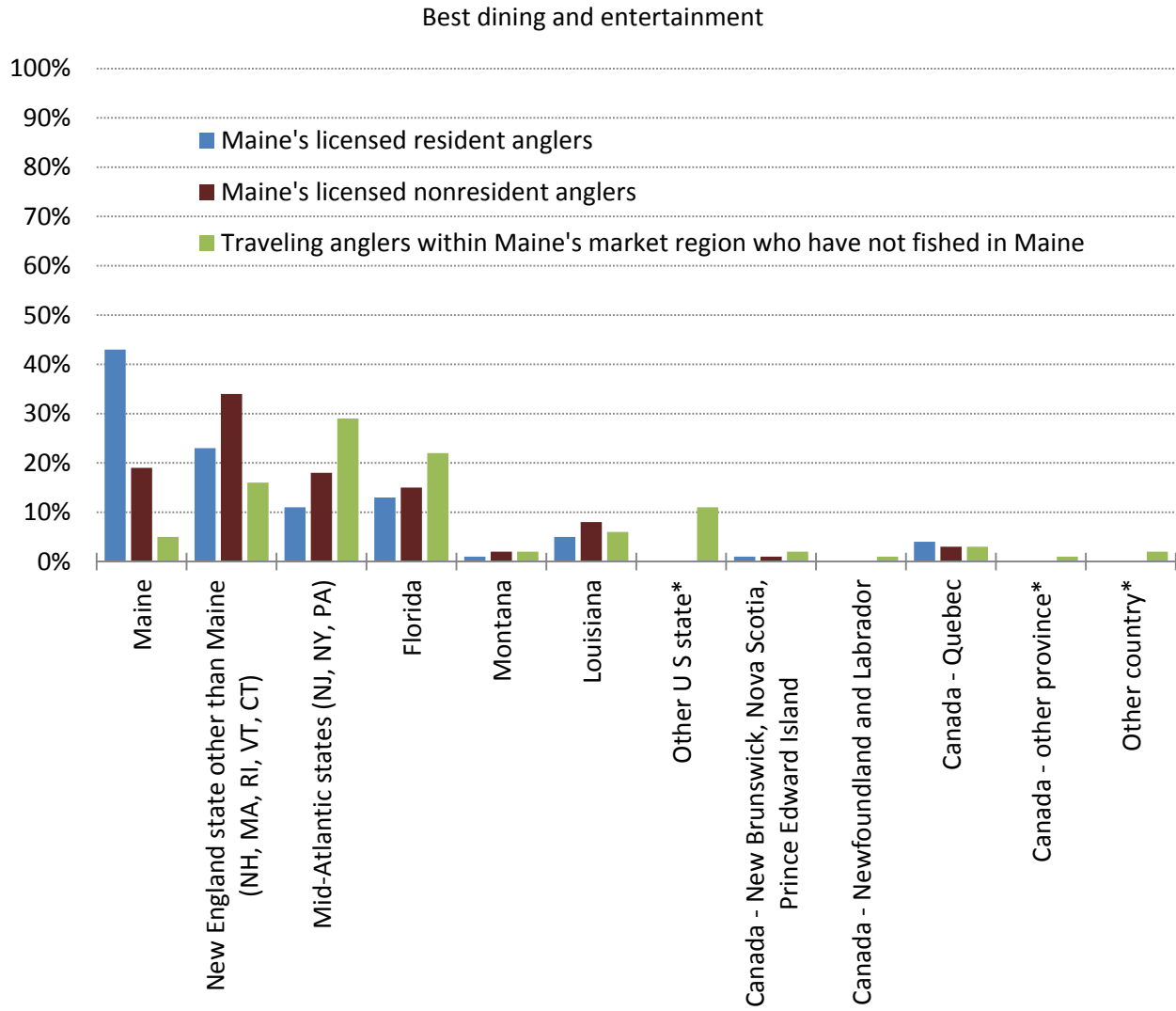
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-15. Maine’s Licensed and Traveling Anglers: Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: *Most fun outside of fishing*



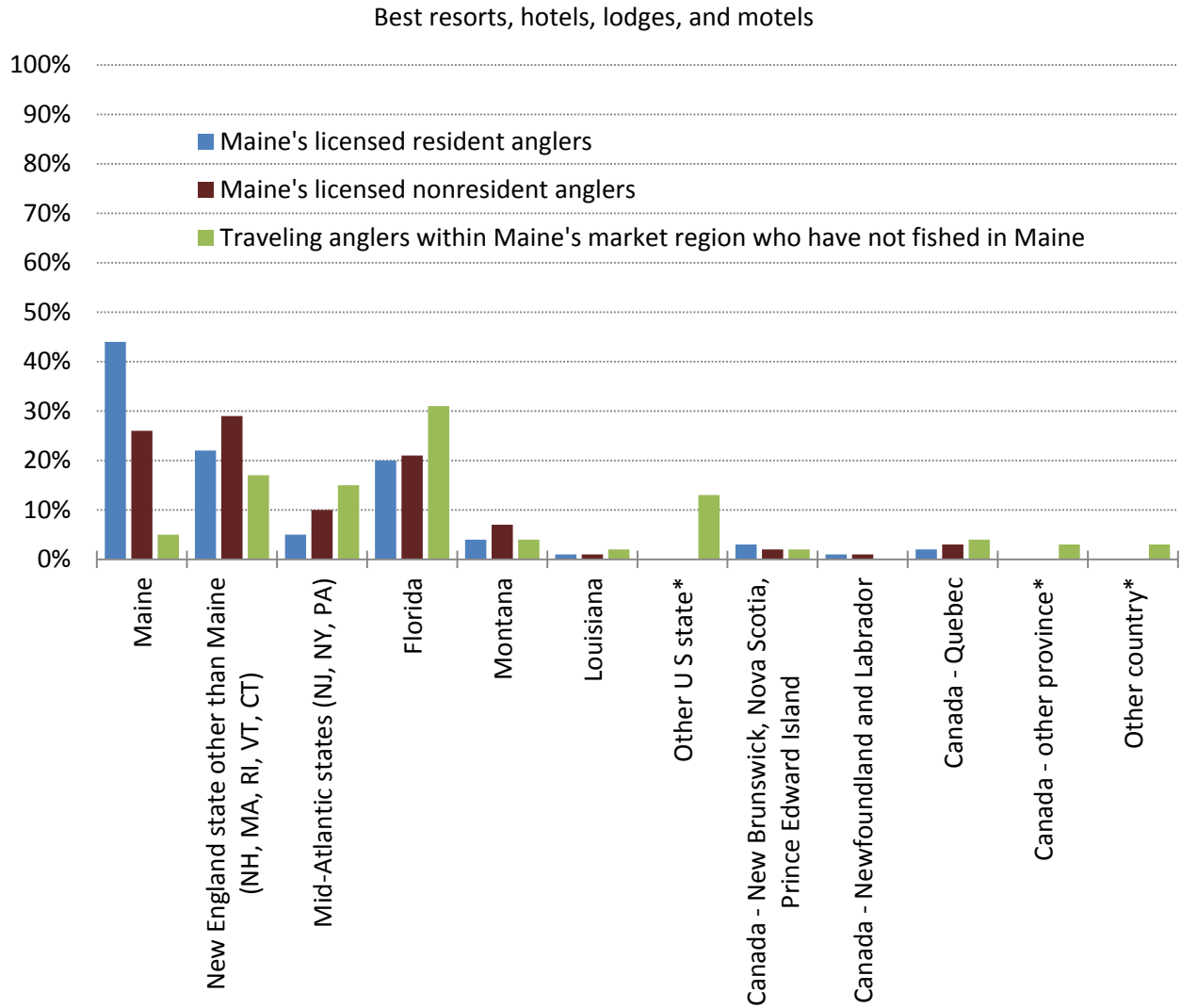
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-16. Maine’s Licensed and Traveling Anglers: *Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: **Best dining & entertainment***



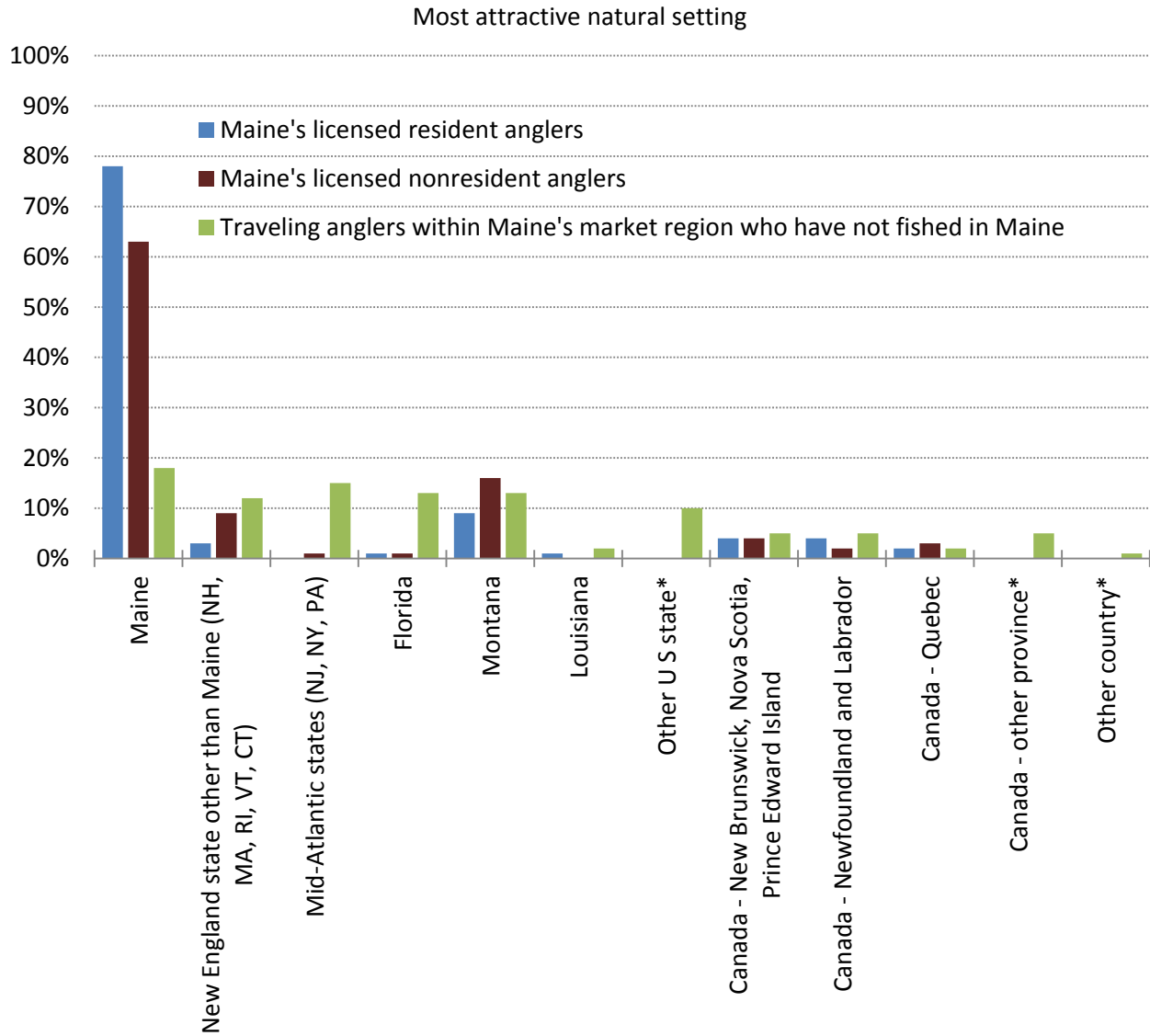
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-17. Maine’s Licensed and Traveling Anglers: Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: *Best resorts, hotels, lodges, and motels*



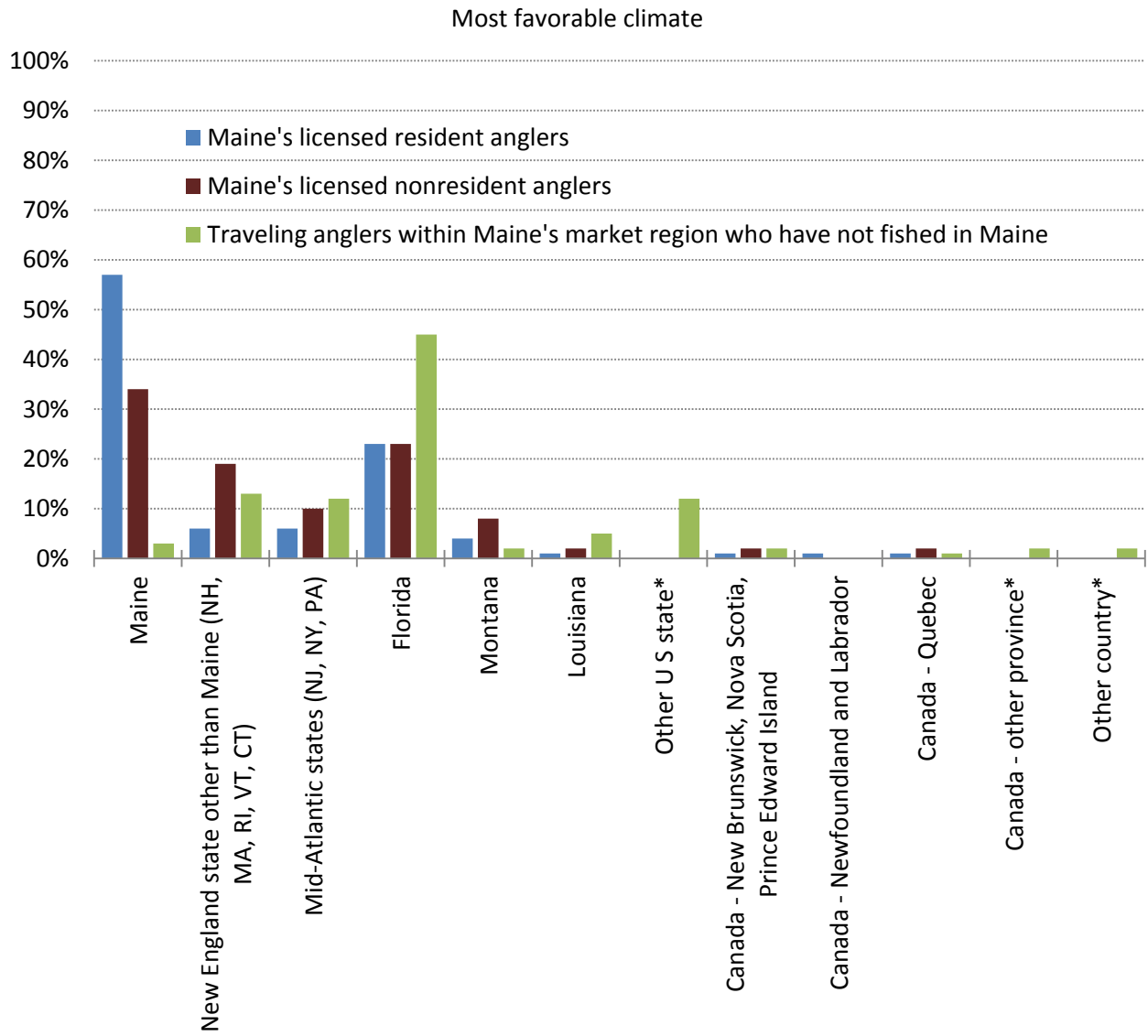
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-18. Maine’s Licensed and Traveling Anglers: Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: *Most attractive natural setting*



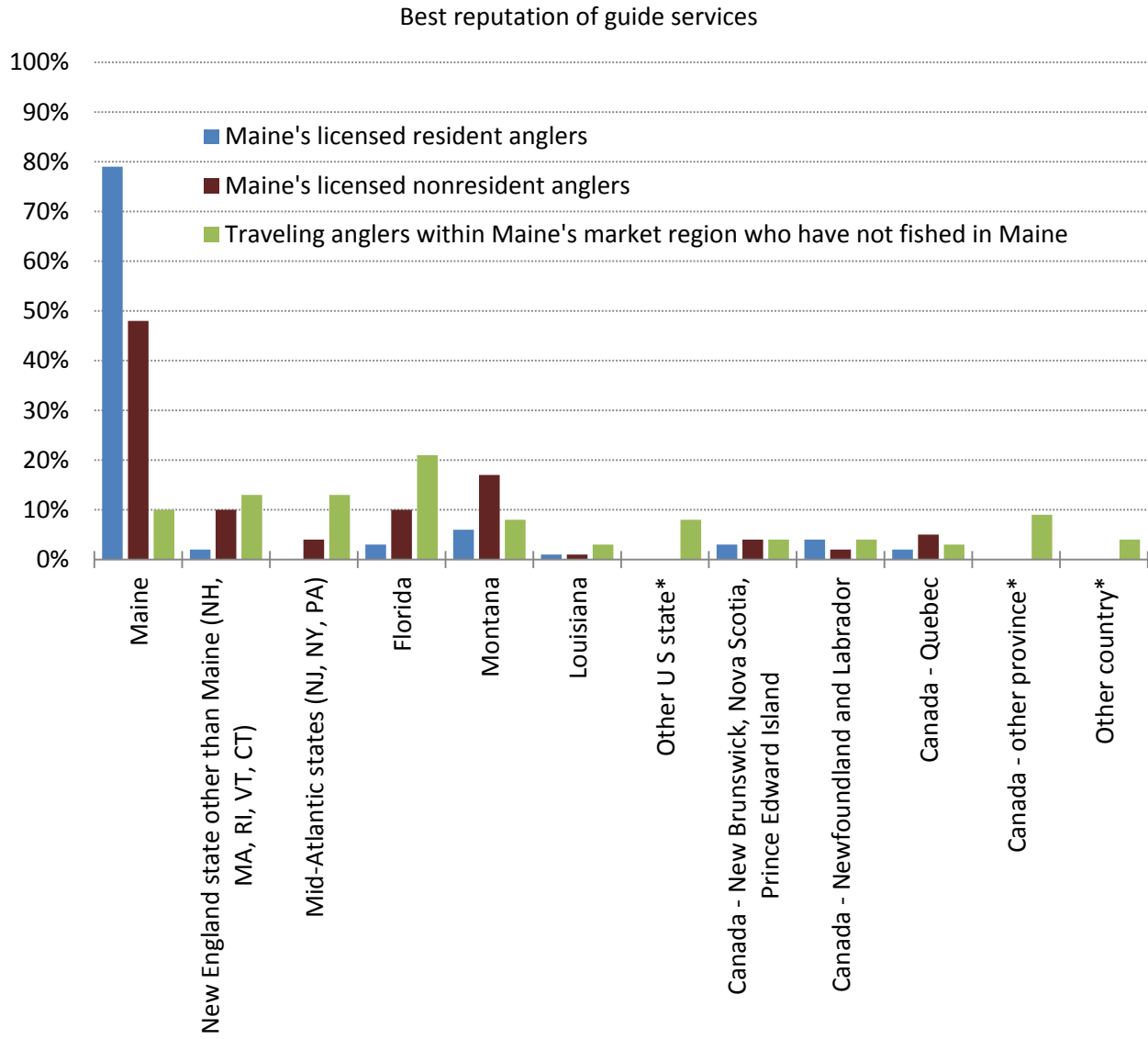
* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-19. Maine’s Licensed and Traveling Anglers: *Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: **Most favorable climate***



* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Figure 2-20. Maine’s Licensed and Traveling Anglers: Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: *Best reputation of guide services*



* Note: The question posed to Maine’s licensed anglers did not include these three possible selections.

Chapter 3 What are hunters and anglers looking for in a hunting or fishing spot?

A variety of factors may influence an individual's decision to hunt or fish in a specific location. Survey respondents were asked to express the importance of factors specific to (1) hunting and fishing, (2) services offered, and (3) site characteristics when choosing their sporting destination. Factors specific to hunting and fishing—or sport-specific factors—are generally related to the presence, visibility, and abundance of the species sought, ease of obtaining a license, and species-specific regulations. Services include the presence of food and lodging accommodations, stores selling sporting goods and repair services, and activities for nonhunting and nonfishing party members as well as the proximity of these services to the location hunted (or fished). Site characteristics refer to natural beauty, remoteness, land development, safety, and proximity to other hunters and/or anglers.

Some of these factors can be manipulated by resource managers, while others cannot. Nevertheless, knowledge of the importance of factors that contribute to peoples' decisions in choosing their sporting destinations can support decision-making by both resource managers and marketers by identifying factors sought by sportsmen and women when they are looking for their sporting destination.

Sport specific factors

- Maine's licensed hunters identified all but one sport specific factor as important in influencing the decision to hunt (Table 3-1). There is one exception; that being the availability to obtain a hunting license at a lodge. Abundance of game and live sightings of their target animal are cited by 90% or more of hunters of all types as the top two sport-specific factors influencing the decision to hunt in Maine.
- In addition to those two factors:
 - Bear hunters identify the length of the hunting season, the types of hunting methods allowed, and the cost of hunting licenses/permits as important factors.
 - Migratory waterfowl hunters identify the ability to hunt multiple species and length of hunting season as important factors.
 - Moose hunters identify the ability to obtain a permit for their desired location as an important factor.
 - Small game hunters identify the ability to hunt multiple species as an important factor.
- Traveling hunters identified the same two factors as being very important in choosing where they hunt: abundance of game and live sightings of their target animal (Table 3-2). For this group, factors were not as consistently ranked as somewhat or very important, relative to Maine's licensed hunters; no option was ranked as somewhat or very important by more than

72% of respondents. The ability to hunt multiple species, hunt on Sunday, and to obtain a hunting license at a lodge were reported to be the least important of all the factors presented.

- As with hunters, each of the sport-specific factors is identified as an important factor influencing where to fish, regardless of water type, for all of Maine’s licensed anglers (Table 3-3). Only one factor – abundance of trophy-sized fish – was cited by fewer than 50% of all respondents.
- The chance to catch many fish and the presence of native fish populations are cited by Maine’s licensed anglers as somewhat or very important factors influencing the decision to fish. Traveling anglers identified the abundance of legal-sized fish and the presence of native fish as the top two somewhat and very important factors (Table 3-4).

Table 3-1. Maine’s Licensed Hunters: How important are each of the following factors to you in choosing whether you hunt [selected species] in Maine?

Option	Not Important	Somewhat Important	Very Important	Total
<u>Residents</u>				
Ability to hunt multiple species	27%	39%	34%	100%
Availability of over-the-counter licenses/permits	37%	26%	37%	100%
Cost of hunting licenses/permits	21%	38%	41%	100%
Hunting license provided at lodge	80%	14%	6%	100%
Length of the hunting season	13%	40%	48%	100%
Number of other hunters	20%	45%	35%	100%
Ability to hunt on Sunday	32%	20%	48%	100%
Obtaining a permit for my desired zone	22%	29%	49%	100%
Special hunting regulations	28%	45%	27%	100%
Type of hunting methods allowed	24%	38%	38%	100%
Abundance of game	4%	31%	65%	100%
Abundance of trophy-sized game	38%	38%	25%	100%
Chance to shoot a trophy animal	43%	33%	24%	100%
Live sightings of target animal	8%	39%	53%	100%
Success of the hunt	26%	43%	31%	100%
<i>Respondents</i>				2,009

Table 3-1 (cont.). Maine's Licensed Hunters: *How important are each of the following factors to you in choosing whether you hunt [selected species] in Maine?*

Option	Not Important	Somewhat Important	Very Important	Total
Nonresidents				
Ability to hunt multiple species	35%	39%	26%	100%
Availability of over-the-counter licenses/permits	28%	30%	41%	100%
Cost of hunting licenses/permits	14%	42%	45%	100%
Hunting license provided at lodge	77%	17%	6%	100%
Length of the hunting season	20%	45%	34%	100%
Number of other hunters	22%	46%	32%	100%
Ability to hunt on Sunday	25%	26%	49%	100%
Obtaining a permit for my desired zone	27%	27%	45%	100%
Special hunting regulations	41%	41%	18%	100%
Type of hunting methods allowed	31%	37%	32%	100%
Abundance of game	5%	30%	65%	100%
Abundance of trophy-sized game	32%	40%	27%	100%
Chance to shoot a trophy animal	34%	38%	28%	100%
Live sightings of target animal	9%	36%	55%	100%
Success of the hunt	23%	44%	32%	100%
<i>Respondents</i>				<i>1,791</i>

Table 3-2. Traveling Hunters within Maine's market region who have not hunted in Maine: *How important are each of the following factors to you in choosing where you hunt outside of your home state or province?*

Option	Not important	Somewhat important	Very important	Total
Ability to hunt multiple species	32%	32%	36%	100%
Availability of over-the-counter licenses/permits	10%	32%	59%	100%
Cost of hunting licenses/permits	6%	36%	58%	100%
Hunting license available at lodge	21%	44%	35%	100%
Length of the hunting season	8%	46%	47%	100%
Number of other hunters	9%	35%	55%	100%
Ability to hunt on Sunday	27%	25%	48%	100%
Special hunting regulations	15%	51%	34%	100%
Type of hunting methods allowed	7%	46%	47%	100%
Abundance of game	2%	25%	72%	100%
Abundance of trophy-sized game	8%	56%	36%	100%
Chance to shoot a trophy animal	9%	54%	37%	100%
Live sightings of target animal	6%	31%	64%	100%
Success of the hunt	11%	32%	57%	100%
Respondents				97

Table 3-3. Maine's Licensed Anglers: How important are each of the following factors to you in choosing whether you go [open water fishing in freshwater / ice fishing] in Maine?

Option	Not Important	Somewhat Important	Very Important	Total
Residents				
Cost of fishing license	38%	46%	16%	100%
Length of the fishing season	40%	43%	18%	100%
Abundance of legal-sized fish	28%	42%	30%	100%
Abundance of trophy-sized fish	52%	33%	15%	100%
Type of tackle allowed (bait, artificial lures, artificial flies)	35%	41%	23%	100%
Complexity of fishing regulations	24%	42%	33%	100%
Ability to catch multiple species	31%	46%	23%	100%
Number of other anglers	31%	45%	24%	100%
Chance to catch a trophy fish	48%	35%	17%	100%
Chance to catch many fish	22%	48%	30%	100%
Diversity of fish species	34%	49%	17%	100%
Presence of native fish populations	18%	40%	41%	100%
Special fishing regulations	37%	45%	19%	100%
Well stocked fishery	25%	45%	30%	100%
<i>Residents</i>				2,883
Nonresidents				
Cost of fishing license	29%	50%	21%	100%
Length of the fishing season	50%	35%	15%	100%
Abundance of legal-sized fish	28%	41%	31%	100%
Abundance of trophy-sized fish	51%	33%	16%	100%
Type of tackle allowed (bait, artificial lures, artificial flies)	35%	46%	19%	100%
Complexity of fishing regulations	32%	46%	22%	100%
Ability to catch multiple species	31%	44%	24%	100%
Number of other anglers	28%	41%	30%	100%
Chance to catch a trophy fish	49%	34%	17%	100%
Chance to catch many fish	23%	46%	31%	100%
Diversity of fish species	32%	48%	19%	100%
Presence of native fish populations	21%	41%	38%	100%
Special fishing regulations	46%	44%	10%	100%
Well stocked fishery	35%	44%	21%	100%
<i>Nonresidents</i>				4,001

Table 3-4. Traveling Anglers within Maine’s market region who have not fished in Maine: How important are each of the following factors to you in choosing where you fish outside of your home state or province?

Option	Not important	Somewhat important	Very important	Total
Cost of fishing license	32%	46%	22%	100%
Length of the fishing season	21%	58%	20%	100%
Abundance of legal-sized fish	13%	43%	44%	100%
Abundance of trophy-sized fish	33%	40%	28%	100%
Type of tackle allowed (bait, artificial lures, artificial flies)	17%	55%	29%	100%
Complexity of fishing regulations	17%	49%	35%	100%
Ability to catch multiple species	17%	45%	38%	100%
Number of other anglers	23%	49%	29%	100%
Chance to catch a trophy fish	33%	41%	26%	100%
Chance to catch many fish	15%	48%	37%	100%
Diversity of fish species	18%	51%	31%	100%
Presence of native fish populations	16%	46%	39%	100%
Special fishing regulations	21%	54%	25%	100%
Well stocked fishery	16%	47%	37%	100%
Respondents				424

Service specific factors

- A majority of all Maine’s licensed hunters cited proximity to their camp or home as the most important service a hunting location can provide (Table 3-5). This is true regardless of species sought with the single exception being from moose hunters, who cite proximity to overnight accommodations as the most important service. Collectively, licensed *resident* hunters reported the availability of nearby businesses offering hunting gear and repair services as the second most important service a hunting location can provide, followed by availability of overnight accommodations. Licensed nonresident hunters reported the same two factors, but in reverse order.

- Traveling hunters report lower levels of importance for any particular factor in general (Table 3-6). Those that appear to be of greatest importance are the availability of overnight accommodations and proximity to food and lodging. Results also show that licensed *nonresident* hunters and traveling hunters place more importance on other factors such as restaurants and activities for non-hunters, relative to licensed *resident* hunters.

- Overall, Maine’s licensed anglers who fished open water reported proximity to home or camp and availability of overnight accommodations as most important amenities (Table 3-7 and 3-8). However, for those who ice fished, the top two most important factors are proximity to camp or home and proximity to sporting goods and repair services. Among traveling anglers, the most important services are lodging and proximity to food and lodging (Table 3-9).

Table 3-5. Maine’s Licensed Hunters: How important are each of the following services to you in choosing whether you hunt [selected species] in Maine?

Option	Not important	Somewhat important	Very Important	Total
Residents				
Availability of overnight accommodations	60%	26%	14%	100%
Close to motels, restaurants, etc.	77%	19%	5%	100%
Close to my camp or home	26%	38%	36%	100%
Nearby businesses offering hunting gear/repair services	56%	35%	10%	100%
Activities for nonhunters	72%	21%	7%	100%
				2,106
Nonresidents				
Availability of overnight accommodations	43%	24%	33%	100%
Close to motels, restaurants, etc.	65%	27%	8%	100%
Close to my camp or home	38%	35%	28%	100%
Nearby businesses offering hunting gear/repair services	50%	40%	10%	100%
Activities for nonhunters	70%	23%	7%	100%
				1,911

Table 3-6. Traveling Hunters within Maine’s market region who have not hunted in Maine: How important are each of the following services to you in choosing where you hunt outside of your home state or province?

Option	Not important	Somewhat important	Very important	Total
Availability of overnight accommodations	11%	33%	56%	100%
Close to motels, restaurants, etc.	15%	48%	37%	100%
Close to my camp or home	24%	48%	28%	100%
Nearby businesses offering hunting gear and repair services	29%	43%	28%	100%
Variety of lodging options	13%	48%	39%	100%
Amenities onsite	19%	52%	30%	100%
Activities for nonhunters	49%	24%	28%	100%
Respondents				97

Table 3-7. Maine’s Licensed Anglers: How important are each of the following services to you in choosing to go *open water* fishing in freshwater in Maine?

Option	Not important	Somewhat important	Very important	Total
<u>Residents</u>				
Availability of overnight accommodations	59%	30%	11%	100%
Close to motels, restaurants, etc.	78%	19%	3%	100%
Close to my camp or home	30%	47%	24%	100%
Nearby businesses offering fishing/boating gear and repair services	65%	30%	4%	100%
Activities for nonanglers	61%	27%	12%	100%
<i>Respondents</i>				2,250
<u>Nonresidents</u>				
Availability of overnight accommodations	38%	34%	29%	100%
Close to motels, restaurants, etc.	58%	32%	11%	100%
Close to my camp or home	42%	33%	24%	100%
Nearby businesses offering fishing/boating gear and repair services	52%	38%	10%	100%
Activities for nonanglers	57%	30%	13%	100%
<i>Respondents</i>				3,950

Table 3-8. Maine’s Licensed Anglers: How important are each of the following services to you in choosing to go ice fishing in Maine?

Option	Not important	Somewhat important	Very Important	Total
<u>Residents</u>				
Availability of overnight accommodations	67%	20%	12%	100%
Close to motels, restaurants, etc.	77%	15%	8%	100%
Close to my camp or home	18%	40%	42%	100%
Nearby businesses offering fishing, snowmobile, ATV gear and repair services	47%	40%	12%	100%
Activities for nonanglers	74%	20%	6%	100%
<i>Respondents</i>				848
<u>Nonresidents</u>				
Availability of overnight accommodations	57%	34%	9%	100%
Close to motels, restaurants, etc.	60%	37%	3%	100%
Close to my camp or home	37%	34%	29%	100%
Nearby businesses offering fishing, snowmobile, ATV gear and repair services	46%	37%	17%	100%
Activities for nonanglers	71%	20%	9%	100%
<i>Respondents</i>				409

Table 3-9. Traveling Anglers within Maine’s market region who have not fished in Maine: How important are each of the following services to you in choosing where you fish outside of your home state or province?

Option	Not important	Somewhat important	Very important	Total
Availability of overnight accommodations	16%	36%	48%	100%
Close to motels, restaurants, etc.	21%	44%	36%	100%
Close to my camp or home	27%	46%	27%	100%
Nearby businesses offering fishing/boating gear and repair services	30%	48%	22%	100%
Nearby businesses offering snowmobile or ATV gear and repair services	56%	35%	8%	100%
Variety of lodging options	24%	49%	27%	100%
Amenities onsite	25%	49%	26%	100%
Activities for nonanglers	32%	47%	21%	100%
<i>Respondents</i>				424

Site specific factors

- Regardless of residency, all of Maine’s licensed hunters expressed high levels of importance for all of the factors presented (Table 3-10). Availability of land open for hunting and a remote location are the most important site characteristics that hunters evaluate when choosing a place to hunt. Traveling hunters report similar preferences, with the availability of open land, a feeling of safety and security and the presence of a remote area as most important (Table 3-11).
- The natural beauty of the surrounding area and the remote location are the top two site characteristics that all of Maine’s licensed open water anglers evaluate when choosing their fishing location (Table 3-12 and 3-13). Maine’s licensed *resident* ice fishermen also reported that natural beauty is important in site choice, in addition to distance from home. Licensed nonresident ice fishermen reported natural beauty and remoteness as key factors in their consideration. Traveling anglers cited natural beauty and safety as the top two most important factors in selecting locations to fish (Table 3-14). It is notable, however, that in their ratings, they clearly recognize the need for open access to the fishery in order to participate in their sport.
- It is interesting to note that the feeling of safety and security, while high for all groups, is cited as one of the two top site characteristics by the Traveling sportsmen group.

Table 3-10. Maine’s Licensed Hunters: How important are each of the following site characteristics to you in choosing whether you hunt [selected species] in Maine?

Option	Not important	Somewhat important	Very important	Total
Residents				
Within driving distance	15%	44%	42%	100%
Feeling of security and safety	22%	36%	41%	100%
Availability of land open for hunting	2%	14%	84%	100%
Easy access from a road	23%	46%	32%	100%
Natural beauty of surrounding area	15%	45%	40%	100%
Remote area with few other people	7%	41%	52%	100%
Walk in access only	42%	45%	13%	100%
<i>Respondents</i>				<i>2,124</i>
Nonresidents				
Within driving distance	24%	44%	32%	100%
Feeling of security and safety	20%	41%	39%	100%
Availability of land open for hunting	3%	14%	83%	100%
Easy access from a road	20%	49%	31%	100%
Natural beauty of surrounding area	11%	41%	48%	100%
Remote area with few other people	6%	38%	56%	100%
Walk in access only	40%	47%	13%	100%
<i>Respondents</i>				<i>1,948</i>

Table 3-11. Traveling Hunters within Maine’s market region who have not hunted in Maine: Finally, how important are the following site characteristics to you in choosing where to hunt outside your home state or province?

Option	Not important	Somewhat important	Very important	Total
Within driving distance	22%	43%	35%	100%
Feeling of security and safety	11%	21%	68%	100%
Availability of land open for hunting	3%	21%	76%	100%
Easy access from a road	19%	31%	49%	100%
Natural beauty of surrounding area	7%	39%	55%	100%
Remote area with few other people	3%	36%	61%	100%
Walk in access only	30%	28%	42%	100%
Respondents				97

Table 3-12. Maine’s Licensed Anglers: How important are each of the following site characteristics to you in choosing to go *open water* fishing in freshwater in Maine?

Option	Not important	Somewhat important	Very important	Total
Residents				
Distance from home	18%	59%	23%	100%
Feeling of security and safety	29%	43%	28%	100%
Boat launch for trailered boat	48%	34%	18%	100%
Easy access from a road	24%	52%	24%	100%
Natural beauty of surrounding area	7%	36%	56%	100%
Remote area with few other people	16%	44%	40%	100%
Walk in access only	51%	38%	11%	100%
Developed Shoreline	68%	25%	7%	100%
Availability of public access	22%	44%	34%	100%
Easy to fish from shore	38%	39%	22%	100%
Plenty of parking on shore	47%	38%	16%	100%
Undeveloped shoreline	27%	39%	34%	100%
Respondents				2,274
Nonresidents				
Distance from home	39%	47%	14%	100%
Feeling of security and safety	28%	46%	26%	100%
Boat launch for trailered boat	59%	26%	15%	100%
Easy access from a road	29%	49%	22%	100%
Natural beauty of surrounding area	6%	27%	67%	100%
Remote area with few other people	13%	43%	44%	100%
Walk in access only	58%	34%	8%	100%
Developed Shoreline	77%	21%	2%	100%
Availability of public access	30%	42%	28%	100%
Easy to fish from shore	44%	39%	17%	100%
Plenty of parking on shore	49%	42%	9%	100%
Undeveloped shoreline	32%	36%	32%	100%
Respondents				4,004

Table 3-13. Maine's Licensed Anglers: How important are each of the following site characteristics to you in choosing to go ice fishing in freshwater in Maine?

Option	Not important	Somewhat important	Very important	Total
<u>Residents</u>				
Distance from home	13%	43%	44%	100%
Feeling of security and safety	22%	34%	44%	100%
Easy access from a road	16%	53%	31%	100%
Natural beauty of surrounding area	11%	46%	42%	100%
Remote area with few other people	18%	49%	33%	100%
Walk in access only	61%	31%	8%	100%
Developed Shoreline	67%	25%	9%	100%
Availability of public access	20%	50%	30%	100%
Easy to fish from shore	48%	39%	13%	100%
Plenty of parking on shore	40%	42%	17%	100%
Undeveloped shoreline	37%	39%	24%	100%
<i>Respondents</i>				<i>861</i>
<u>Nonresidents</u>				
Distance from home	44%	43%	13%	100%
Feeling of security and safety	47%	31%	21%	100%
Easy access from a road	31%	53%	17%	100%
Natural beauty of surrounding area	13%	29%	59%	100%
Remote area with few other people	21%	48%	31%	100%
Walk in access only	55%	32%	13%	100%
Developed Shoreline	75%	23%	1%	100%
Availability of public access	29%	38%	32%	100%
Easy to fish from shore	59%	26%	15%	100%
Plenty of parking on shore	45%	41%	15%	100%
Undeveloped shoreline	38%	41%	20%	100%
<i>Respondents</i>				<i>419</i>

Table 3-14. Traveling Anglers within Maine’s market region who have not fished in Maine: Finally, how important are the following site characteristics to you in choosing where to fish outside of your home state or province?

Option	Not important	Somewhat important	Very important	Total
Distance from home	18%	52%	31%	100%
Feeling of security and safety	8%	44%	48%	100%
Availability of public access	11%	51%	39%	100%
Boat launch for trailered boat	29%	39%	32%	100%
Easy access from a road	10%	51%	39%	100%
Easy to fish from the shore	14%	44%	42%	100%
Plenty of parking on shore	20%	46%	33%	100%
Developed shoreline	28%	48%	23%	100%
Natural beauty of surrounding area	6%	43%	51%	100%
Remote area with few other people	19%	51%	30%	100%
Walk in access only	40%	46%	14%	100%
Undeveloped shoreline	34%	51%	15%	100%
Respondents				424

Chapter 4 Information sources for trip planning

Knowing where sportsmen and women go for information about hunting and fishing destinations can aid in development of strategic marketing plans. In this chapter, the sources people consult when selecting places to hunt and fish are identified for both licensed and traveling sportsmen and women. Information sources included people, such as family and friends, as well as media, such as websites, newspapers, radio and television. This information is paired with results of Southwick Associates' most recent application of its Media Monitor (SAMM), an online consumer panel survey that tracks hunter, angler, and shooter's media consumption preferences.

Information sources

- The most popular source of information about places to visit for hunting among Maine's licensed sportsmen is family and friends (Table 4-1). A significant percentage of them also draw from personal experience and website research. Outside of a sportsman's trusted circle of companions, there are multiple avenues to connect with new or returning sportsmen. Maine's licensed hunters also tend to consult magazines and state hunting regulations. No other information source was listed by more than 30% of licensed sportsmen. However, trade shows were cited as an important information source by 25% Maine's *nonresident* licensed hunters, compared with only 12% of *resident* licensed hunters.
- Traveling hunters report using similar information sources when considering hunting destinations but appear to use more sources more frequently than Maine's licensed hunters (Table 4-2). Traveling hunters reported family and friends, hunting regulations, and magazines as the most frequently used information, followed by personal experience, trade shows and website research. Each of these options was cited by more than 30% of respondents.
- Maine's licensed anglers reported the same top three information sources as licensed hunters – family and friends, websites and personal experience (Table 4-3). No other source was reported by more than 30% of respondents. Maine's licensed *nonresident* anglers are more likely to consult more information sources than resident anglers, particularly state tourism guides, fishing regulations and magazines.
- The top three information sources listed by traveling anglers – both U.S. residents and Canadians – are family and friends, personal experience and website research (Table 4-4). Traveling anglers who are U.S. residents also reported use of fishing regulations and tourism guides. Canadians reported they commonly consult tourism guides, magazines, trade shows and television as well. No other means of information was cited by more than 30% of respondents.

Table 4-1. Maine's Licensed Hunters: *Typically, what sources of information do you use when looking for information about places to visit for hunting? (select all that apply)*

Option	Residents	Nonresidents
Magazines	32%	38%
Websites	46%	56%
Television	15%	15%
State hunting regulations	34%	37%
Social media	14%	10%
Newspaper	6%	3%
Outdoor exhibitions, hunting/fishing fairs and shows	12%	25%
Books	11%	9%
Radio	3%	1%
Family and friends	71%	68%
Previous personal experience	47%	56%
State tourism guides	13%	13%
Other	3%	4%
None of the above	6%	2%
Respondents	5,456	3,473

Table 4-2. Traveling Hunters within Maine's market region who have not hunted in Maine: *Typically, what sources of information do you use when looking for information about places to visit for hunting? (check all that apply)*

Option	US/Canada Residents
Magazines	45%
Websites	35%
Television	14%
State or provincial hunting regulation guides	50%
Social media (for example, Facebook or Twitter)	16%
Newspaper	15%
Outdoor exhibitions, hunting/fishing fairs and shows	36%
Books	10%
Radio	8%
Family or friends	64%
Previous personal experience	38%
State or provincial tourism guides	22%
Other, please describe	0%
None of the above	5%
Respondents	102

Table 4-3. Maine's Licensed Anglers: *Typically, what sources of information do you use when looking for information about out-of-town places to fish? (select all that apply)*

Option	Residents	Nonresidents
Magazines	17%	27%
Websites	48%	63%
Television	9%	8%
State or provincial fishing regulation guides	18%	21%
Social media (for example, Facebook or Twitter)	16%	13%
Newspaper	6%	3%
Outdoor exhibitions and hunting/fishing fairs and shows	10%	16%
Books	8%	15%
Radio	2%	1%
Family or friends	65%	63%
Previous personal experience	31%	43%
State tourism guides	18%	25%
Other, please describe	3%	4%
None of the above	11%	4%
Respondents	6,711	8,022

Table 4-4. Traveling Anglers within Maine's market region who have not fished in Maine: *Typically, what sources of information do you use when looking for information about places to visit for fishing? (check all that apply)*

Option	US Residents	Canada Residents
Magazines	24%	37%
Websites	46%	50%
Television	17%	30%
State or provincial fishing regulation guides	32%	22%
Social media (for example, Facebook or Twitter)	22%	21%
Newspaper	11%	17%
Outdoor exhibitions, hunting/fishing fairs and shows	24%	31%
Books	8%	22%
Radio	3%	16%
Family or friends	60%	68%
Previous personal experience	50%	49%
State or provincial tourism guides	30%	41%
Other, please describe	2%	0%
None of the above	4%	2%
Respondents	451	79

Top magazines, TV shows, and websites

- When visiting the web for information, licensed hunters overwhelmingly reported looking at state/provincial fish and game websites and hunting lodge websites (Table 4-5). Traveling hunters report using the same two websites but also report high levels of use (above 50% of respondents) of local hunting websites and websites sponsored by state/provincial parks and tourism agencies (Table 4-6).
- Generally, anglers are more likely to draw from a wider variety of sites, with Maine’s licensed *nonresident* anglers and traveling anglers using a greater variety than Maine’s licensed *resident* anglers (Table 4-11 and 4-12). The top websites reported by Maine’s licensed anglers include state/provincial fish and game websites, local hunting/fishing sites, and hunting lodge websites, in addition to state/provincial parks and tourism sites. Traveling anglers consult the same websites, with the one exception being that they use local sites less frequently.
- The Southwick Associates Media Monitor (SAMM) survey is an online consumer panel survey that tracks hunter, angler, and shooter’s media consumption preferences. Results from the most recent Southwick Associates Media Monitor augment the survey results by providing insights as to the various websites, magazines and television shows that hunters and anglers report viewing or reading.
 - Among hunters who reside in Maine’s market region, we find the top two (Table 4-7 through 4-10):
 - Websites visited (other than state agency sites) — *Ducks Unlimited* and *North American Hunting Club*
 - Magazines read — *Field & Stream* and *North American Hunter*
 - TV shows watched — *Real Tree Outdoors* and *Jim Shockey’s Hunting Adventures*
 - Social media sites used — Facebook and Twitter
 - Among anglers who reside in Maine’s market region and responded to SAMM survey, we find the top two (Table 4-13 through 4-16):
 - Websites visited (other than state agency sites) — *North American Fishing Club* and *Florida Sportsman*
 - Magazines read — *Field & Stream* and *North American Fisherman*
 - TV shows watched — *The Bassmasters* and *River Monsters*
 - Social media sites used — Facebook and YouTube

Table 4-5. Maine’s Licensed Hunters: Which websites do you visit? (select all that apply)

Option	Residents	Nonresidents
State or provincial fish and game websites	85%	83%
State or provincial tourism websites	23%	17%
State or provincial parks websites	22%	15%
Lodge or hunting camp websites	57%	71%
Respondents	2,646	1,869

Table 4-6. Traveling Hunters within Maine’s market region who have not hunted in Maine: Which websites do you visit? (check all that apply)

Option	US/Canada Residents
State or provincial fish and wildlife agency websites	79%
State or provincial tourism websites	54%
State or provincial parks websites	55%
Lodge or hunting camp websites	62%
Websites associated with magazines or TV shows	30%
Local hunting websites	60%
National hunting websites not affiliated with magazines or TV shows	10%
Respondents	45

Table 4-7. Top ten websites visited by hunters responding to Southwick Associates Media Monitor (SAMM) survey

Top 10 Websites	Percent of Hunters
Ducks Unlimited (ducks.org, du.org)	5%
Pennsylvania Game Commission (pgc.state.pa.us)	5%
New York State DEC (decny.gov)	5%
North American Hunting Club (NAHC) (huntingclub.com, hunt10.com)	4%
Field & Stream (fieldandstream.com)	4%
Cabela's (cabelas.com)	3%
Refuge (refugeforms.com)	3%
Bowhunt or Die (bowhunting.com)	3%
Facebook (facebook.com)	2%
Growing Deer TV (growingdeer.tv)	2%
Respondents	423

Table 4-8. Top ten magazines read by hunters responding to Southwick Associates Media Monitor (SAMM) survey

Top 10 Magazines	Percent of Hunters
Field & Stream	35%
North American Hunter	34%
American Hunter	26%
American Rifleman	21%
Outdoor Life	20%
North American Fisherman	14%
Guns & Ammo	14%
Ducks Unlimited	13%
Pennsylvania Game & Fish	12%
Deer & Deer Hunting	11%
Respondents	423

Table 4-9. Top ten TV shows watched by hunters responding to Southwick Associates Media Monitor (SAMM) survey

Top 10 TV Shows	Percent of Hunters
Real Tree Outdoors (Outdoor Channel)	17%
Jim Shockey's Hunting Adventures (Outdoor Channel)	14%
Ted Nugent Spirit of the Wild (Outdoor Channel)	14%
Bone Collector (Outdoor Channel)	13%
Remington Country (Outdoor Channel)	12%
American Rifleman TV (Outdoor Channel)	11%
Shooting USA (Outdoor Channel)	10%
Primos Truth about Hunting (Outdoor Channel)	8%
North American Hunter (Pursuit Channel)	8%
Alaska; The Last Frontier (Discovery Channel)	8%
<i>Respondents</i>	<i>423</i>

Table 4-10. Top ten social media sites used by hunters responding to Southwick Associates Media Monitor (SAMM) survey

Top 5 Social Media Sites	Percent of Hunters
Facebook	22%
Twitter	8%
YouTube	7%
Google+	2%
LinkedIn	1%
<i>Respondents</i>	<i>423</i>

Table 4-11. Maine's Licensed Anglers: Which websites do you visit? (select all that apply)

Option	Residents	Nonresidents
State or provincial fish and wildlife agency websites	66%	75%
State or provincial tourism websites	37%	38%
State or provincial parks websites	38%	40%
Lodge or fishing camp websites	38%	47%
Local fishing and/or hunting websites	38%	50%
Websites associated with magazine or television shows	19%	14%
National fishing websites not affiliated with a magazine or TV show	8%	15%
<i>Respondents</i>	<i>3,551</i>	<i>4,969</i>

Table 4-12. Traveling Anglers within Maine's market region who have not fished in Maine: Which websites do you visit? (check all that apply)

Option	US Residents	Canada Residents
State or provincial fish and wildlife agency websites	69%	73%
State or provincial tourism websites	52%	60%
State or provincial parks websites	43%	58%
Lodge or fishing camp websites	38%	66%
Websites associated with magazines or TV shows	28%	29%
Local fishing websites	42%	25%
National fishing websites not affiliated with magazines or TV shows	17%	29%
Respondents	223	42

Table 4-13. Top ten websites visited by anglers responding to Southwick Associates Media Monitor (SAMM) survey

Top 10 Websites	Percent of Anglers
North American Fishing Club (fishingclub.com) (NAFC.com)	8%
Ohio Department of Natural Resources (DNR.State.OH.US)	7%
Michigan Department of Natural Resources (Michigan.gov/dnr)	6%
Florida Sportsman (floridasportsman.com)	5%
Bass Angler's Sportsmen Society (B.A.S.S.) (bassmaster.com, bassresource.com)	5%
Florida Fish and Wildlife Conservation Commission (myfwc.com)	5%
Pennsylvania Game Commission (pgc.state.pa.us)	4%
Facebook (facebook.com)	4%
Field & Stream (fieldandstream.com)	3%
Ducks Unlimited (ducks.org, du.org)	3%
Respondents	379

Table 4-14. Top ten magazines read by anglers responding to Southwick Associates Media Monitor (SAMM) survey

Top 10 Magazines	Percent of Anglers
Field & Stream	20%
North American Fisherman	18%
In-Fisherman	13%
Bassmaster (BASS)	13%
Florida Sportsman	11%
Outdoor Life	10%
North American Hunter	10%
American Hunter	9%
American Rifleman	8%
Saltwater Sportsman	8%
Respondents	379

Table 4-15. Top ten TV shows watched by anglers responding to Southwick Associates Media Monitor (SAMM) survey

Top 10 TV Shows	Percent of Anglers
The Bassmasters (Outdoor Channel)	14%
River Monsters (Animal Planet)	13%
The Bass Pros (Outdoor Channel)	13%
Major League Fishing (Outdoor Channel)	11%
Bassmasters (ESPN/ESPN2)	11%
In-Fisherman (Sportsman Channel)	10%
Lindner's Fishing Edge (Outdoor Channel)	9%
Bassmaster Classic (ESPN/ESPN2)	7%
Bill Dance Outdoors (NBC Sports)	7%
Wicked Tuna (National Geographic)	7%
Respondents	379

Table 4-16. Top ten social media sites used by anglers responding to Southwick Associates Media Monitor (SAMM) survey

Top 5 Social Media Sites	Percent of Anglers
Facebook	22%
YouTube	9%
Twitter	7%
LinkedIn	2%
Google+	2%
Respondents	379

Chapter 5 Maine's hunter or angler

Monitoring the frequency with which people hunt and fish in Maine and their reasons for participating in a sport highlights their level of experience in and familiarity with Maine, as well as some of the reasons why they participate in sporting activity in Maine. Here, respondents were asked when they first hunted and fished in Maine and how often they do so. They were also asked why they choose to hunt and fish.

History with hunting or fishing in Maine

- Between 15% and 18% percent of Maine's licensed *resident* hunters began hunting in the state on a regular basis during each of the decades since 1970 (Figure 5-1). Conversely, the greatest percentage of licensed *nonresident* hunters share that they regularly began hunting in Maine within the last five years. While a majority of licensed hunters reported they hunt in Maine at least once per year, licensed *residents* report hunting more frequently than *nonresidents* reflecting a strong level of avidity among *residents* (Figure 5-2).
- Between 16% and 18% percent of Maine's licensed anglers indicate they began fishing in the state during each of the decades between 1970 and 2000 (Figure 5-3). The state experienced slightly smaller growth in the angling population between 2000 and 2010 when only 10% licensed *resident* anglers indicated they started fishing during that time. Conversely, a substantial proportion of licensed *nonresident* anglers do not have a long history of fishing in Maine. The greatest percent of *nonresident* anglers report that they began fishing in Maine within the last five years.
- Almost half of the licensed *resident* anglers fish in the state every year or every other year (Figure 5-4). In comparison, licensed *nonresident* anglers fish Maine's waters much less frequently.

Figure 5-1. Maine's Licensed Hunters: *As best as you can recall, when did you first hunt in Maine?*

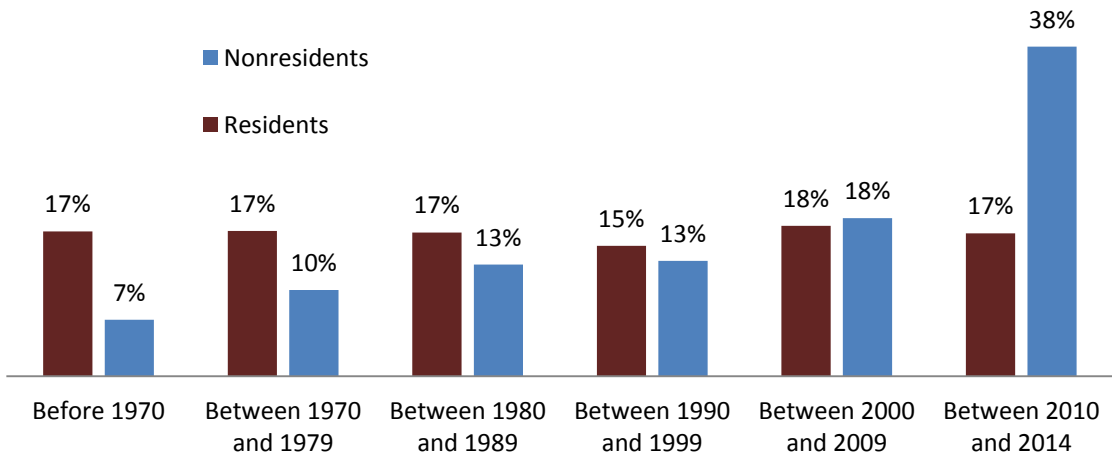


Figure 5-2. Maine's Licensed Hunters: *About how often do you hunt in Maine?*

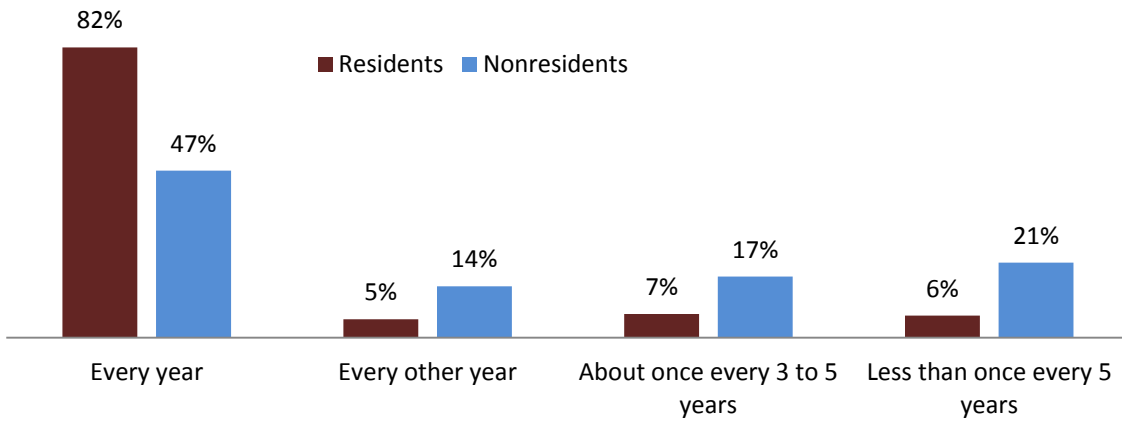


Figure 5-3. Maine's Licensed Anglers: *As best as you can recall, when did you first fish in Maine?*

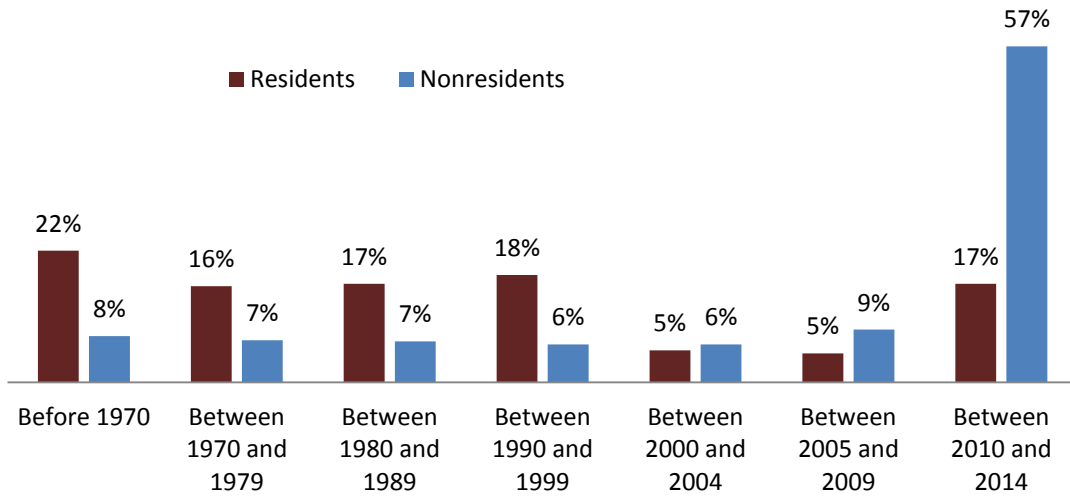
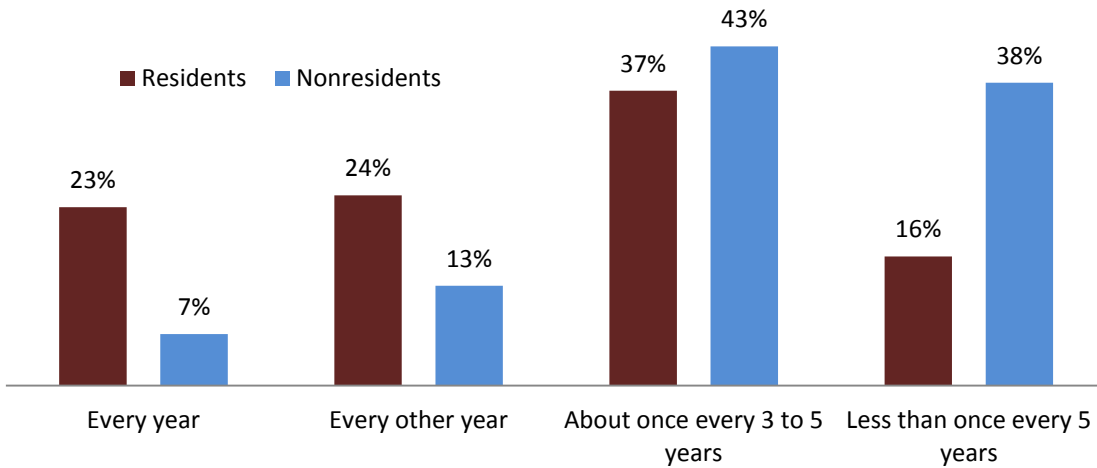


Figure 5-4. Maine's Licensed Anglers: *About how often do you fish in Maine?*



Personal reasons for hunting or fishing

- The Maine Office of Tourism was interested in learning why people hunt or fish and whether they consider hunting and fishing trips a “vacation”, meaning that for them it is a leisure activity. We gain slightly different insights from the slightly different questions shown to Maine’s licensed sportsmen and women and to the traveling sportsmen and women. While a majority of Maine’s *resident* and *nonresident* hunters consider hunting to be a vacation, nonresidents feel this way significantly more often than *residents* do (Table 5-1). Maine’s licensed *resident* and *nonresident* anglers reported responses similar to licensed hunters (Table 5-3). Here again, a majority of both groups reported fishing to at least sometimes be a vacation, *nonresidents* are more likely to always consider fishing to be a vacation.
- Traveling sportsmen and women were asked a different question. Results show traveling hunters most enjoy the opportunity to be outdoors and close to nature, and simply enjoy hunting (Table 5-2). For them, hunting is for relaxation, to get away, and for recreation. The top four reasons for fishing as reported by traveling anglers, whether they are US residents or Canadian residents are the same, although the order of importance differs slightly (Table 5-4). Both groups reported they fish for recreation; relaxation or to get away; to be with family and friends; and to be outdoors and close to nature.

Table 5-1. Maine’s Licensed Hunters: Is hunting a leisure activity that you consider to be a vacation? (select one response)

Response	Residents	Nonresidents
Always	53%	75%
Sometimes	40%	23%
Never	7%	3%
Total	100%	100%
Respondents	2,155	1,925

Table 5-2. Traveling Hunters within Maine's market region who have not hunted in Maine: Which of the following represents the most important reasons why you hunt? (check all that apply)

Option	US/Canada Residents
For the excitement of the chase	41%
To be outdoors or close to nature	74%
To be with family and friends	48%
For recreation or fun	57%
For the sport	39%
I enjoy it	68%
For the meat	50%
Tradition	28%
Exercise / good for health	52%
For the challenge	49%
For relaxation or to get away	60%
Conservation, game management	10%
For the trophy	14%
Like to work with dogs	0%
Respondents	102

Table 5-3. Maine's Licensed Anglers: Is fishing a leisure activity that you consider to be a vacation? (select one response)

Response	Residents	Nonresidents
Always	52%	72%
Sometimes	43%	27%
Never	5%	1%
Total	100%	100%
Respondents	2,993	3,519

Table 5-4. Traveling Anglers within Maine's market region who have not fished in Maine:
Which of the following represents the most important reasons why you fish? (check all that apply)

Option	US Residents	Canada Residents
For the sport	53%	49%
For recreation or fun	82%	82%
For relaxation or to get away	68%	59%
To be with family and friends	61%	62%
To catch fresh fish to eat	46%	44%
To be outdoors or close to nature	60%	62%
For the thrill of the catch	54%	46%
For the challenge	36%	26%
To catch a lot of fish	18%	23%
To catch large fish	24%	27%
Tradition	19%	26%
Exercise/good for health	20%	32%
Other, please describe	1%	0%
Respondents	451	79

Chapter 6 Targeting traveling sportsmen in Maine's market region

US sportsmen and women routinely travel between states and to other countries to engage in hunting and fishing. In order to understand how prevalent that travel is nationally the US Fish and Wildlife Service (USFWS) reports the number of US hunters and anglers in each state who travel beyond their state of residence to hunt or fish. Here, this information is used to identify states within the continental US with high numbers of traveling hunters and anglers, and to compare that to the states that contribute to Maine's population of nonresident licensed hunters and anglers, or Maine's penetration. Maine's market penetration rate for a particular state is defined as the number of hunters or anglers who have purchased a Maine license in that state per 1,000 hunters (or anglers) in that state who traveled to hunt or fish in 2011, as reported by the USFWS. Results identify potential untapped populations of sportsmen and women and provide a pictorial representation of the proximity of states contributing to Maine's licensed hunters and anglers compared to states with high numbers of traveling anglers.

Using the demographic and geographic characteristics of Maine's existing licensed sportsmen population, it is possible to identify other locations within the continental United States that fit the same profile using a tool developed by ESRI for their ArcGIS platform. The tool works by developing a "Similarity Index" value which can be viewed as the relative level of similarity between hunters or anglers in one location versus those hunters and anglers who have traveled to Maine to hunt and fish. In this chapter we present two maps, one for hunters and one for anglers which identifies populations throughout the US that are similar to Maine's licensed hunters and anglers, and therefore, shows potentially untapped markets or places from which potentially new hunters or anglers could be recruited.

Geographic distribution of Maine's licensed nonresident hunters and anglers

- Among Maine's resident population, 13% of people participate in hunting activities and 18% of people participate in angling activities.⁹ This level of participation is higher than at the National level (6% hunting and 14% fishing) or at the New England Census Division (4% hunting and 12% fishing).¹⁰ While resident hunters and anglers make up the majority of the state's sportsmen population and license sales, nonresidents who travel to the state to hunt or fish are also an important component of that group.
- The largest proportion of Maine's licensed nonresident hunters in 2013 resides in Massachusetts, followed by New Hampshire and Pennsylvania (Table 6-1). Reviewing the geographical distribution of Maine's nonresident hunters based on license sales between 2009

⁹ U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

¹⁰ *ibid*

and 2013, the majority of Maine's nonresident hunters reside in the Northeast and Mid-Atlantic regions (Figure 6-1).

- The largest proportion of Maine's licensed nonresident anglers in 2013 resides in Massachusetts, followed by New Hampshire and Connecticut (Table 6-2). Exploring the geographical distribution of Maine's nonresident anglers based on license sales between 2009 and 2013, the majority of Maine's nonresident anglers reside in the Northeast and Mid-Atlantic regions, as well (Figure 6-2).

Table 6-1. Maine's licensed nonresident hunters by state of residence in 2013

State	Count	% of nonresident hunters
Massachusetts	7,767	29%
New Hampshire	3,495	13%
Pennsylvania	2,479	9%
Connecticut	2,095	8%
Vermont	1,936	7%
New York	1,622	6%
New Jersey	1,508	6%
Rhode Island	911	3%
Florida	718	3%
Virginia	490	2%
Other States	3,558	13%
Canada	388	1%

Figure 6-1. Geographic distribution of Maine hunters who purchased a license between 2009 and 2013

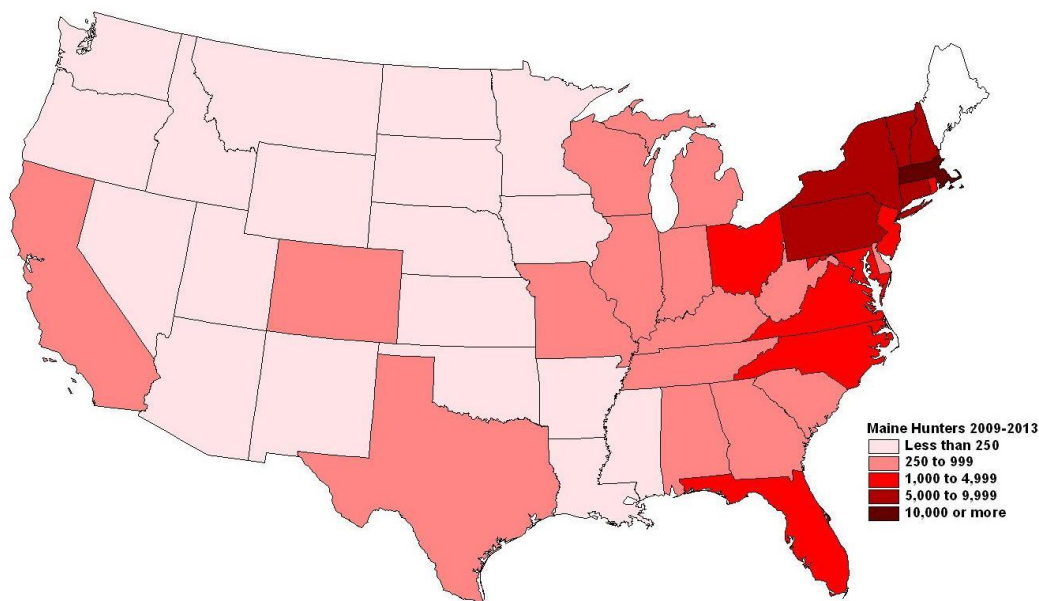
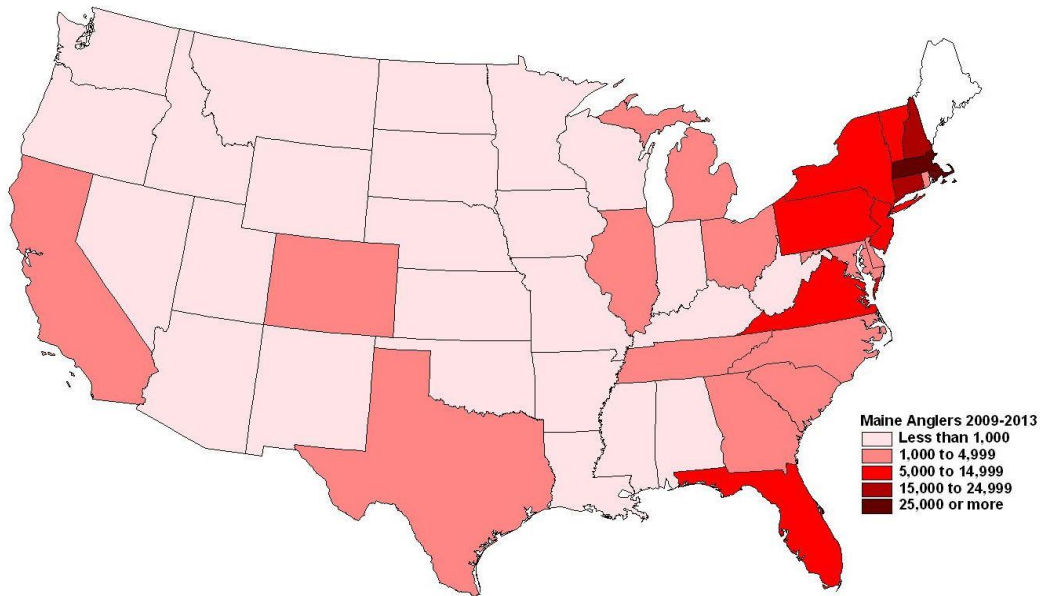


Table 6-2. Maine's licensed nonresident anglers by state of residence in 2013

State	Count	% of nonresident anglers
Massachusetts	22,042	30%
New Hampshire	9,463	13%
Connecticut	6,914	10%
New York	4,284	6%
Pennsylvania	4,234	6%
New Jersey	4,156	6%
Florida	2,698	4%
Vermont	2,007	3%
Rhode Island	2,000	3%
Virginia	1,791	2%
Other States	11,858	16%
Canada	1,164	2%

Figure 6-2. Geographic distribution of Maine's anglers who purchased a license between 2009 and 2013

Geographic distribution of the Nation's traveling hunters and anglers

- Figures 6-3 and 6-4 show the number of US hunters and anglers who traveled beyond their state of residence to hunt or fish in 2011 by state. The data source is the USFWS National Survey of Fishing, Hunting, and Wildlife-Associated Recreation. The majority of traveling hunters reside in the Midwest and the South Census Regions. Traveling anglers are much more widely dispersed across the US, yet the highest concentrations are also in the Midwest and South Census Regions.
- In conjunction, Tables 6-3 and 6-4 show the top fifteen states with the highest propensity for traveling sportsmen, where propensity is calculated as the number of hunters, for example, who report they travel as a proportion of all hunters with that state. Many of the states within Maine's market region are also among the states with sportsmen who have higher propensity to travel to hunt and fish.

Figure 6-3. Geographical distribution of the Nation's traveling hunters in 2011 (Data source: U.S. Census Bureau Fishing, hunting, and wildlife-associated recreation survey)

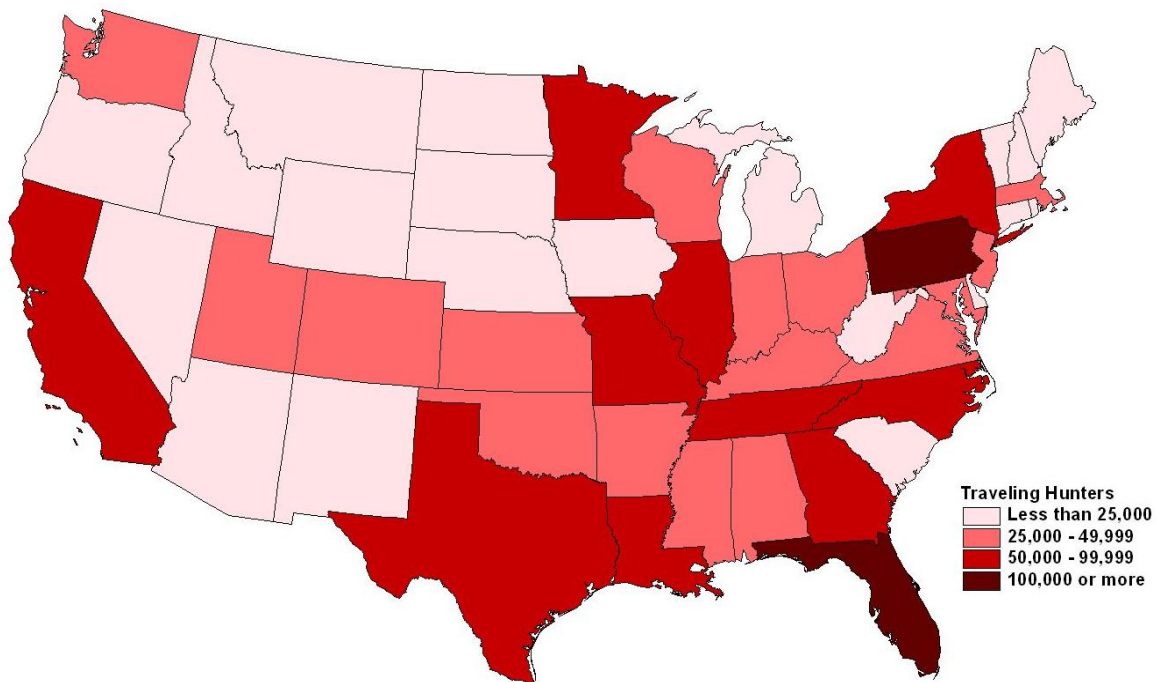


Table 6-3. Fifteen states with the highest propensity of hunters to travel outside of their home state

State of residency	Residents who hunted out-of--state	Propensity to travel
National average		14%
Connecticut	53,106	65%
Massachusetts	31,322	48%
Nevada	23,341	48%
Florida	146,316	44%
Maryland	36,083	41%
New Jersey	46,891	41%
New Hampshire	17,473	40%
Minnesota	185,907	39%
South Carolina	91,841	39%
Rhode Island	6,023	35%
California	154,359	33%
Delaware	7,043	31%
Louisiana	79,179	27%
Georgia	81,784	26%
Arkansas	79,363	25%

Figure 6-4. Geographical distribution of the Nation's traveling anglers in 2011 (Data source: U.S. Census Bureau Fishing, hunting, and wildlife-associated recreation survey)

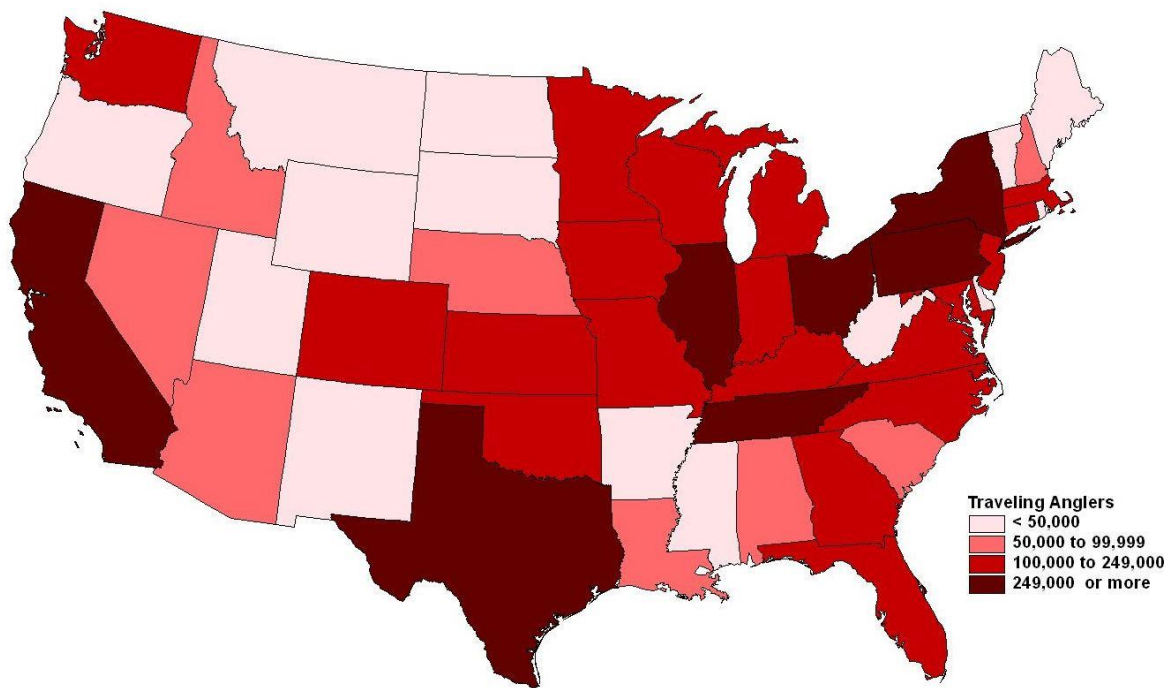


Table 6-4. Fifteen states with the highest propensity of anglers to travel outside of their home state

State of residency	Residents who fished out-of--state	Propensity to travel
National average		21%
Delaware	49,039	53%
Connecticut	172,936	51%
Nevada	67,644	43%
Maryland	170,821	42%
Massachusetts	174,739	38%
Illinois	443,307	36%
New Jersey	243,043	36%
North Dakota	27,308	36%
New Hampshire	57,615	35%
Nebraska	68,319	35%
Tennessee	274,491	33%
Ohio	450,752	31%
Pennsylvania	311,119	31%
Rhode Island	27,945	30%
Iowa	150,511	29%

Maine's penetration into the traveling hunter and angler market

- Exploring all 50 states from the perspective of where Traveling sportsmen went to hunt, Maine ranks 24th and currently captures 2% of the market of traveling hunters (Table 6-5). Geographically, Maine has a greater penetration into the traveling sportsmen market in the Northeast region of the country, by recruiting anglers who reside in those areas (Figure 6-5).
- Among the Traveling sportsmen who fish, Maine ranks 19th, currently capturing 2% of the market of traveling anglers (Table 6-7). Geographically, Maine has penetrated the angler market in the Northeast, as well as the Mid-Atlantic and Florida to some degree (Figure 6-6).
- Tables 6-6 and 6-8 show the percent of the traveling sportsmen market captured by Maine across other states in Maine's potential sportsmen market. Findings indicate that, given the size of the traveling sportsmen market in the top ten "source" states for nonresident hunters and anglers, there remains growth potential to increase the state's level of penetration within that market.

Table 6-5. Top states within the Nation's hunting sportsmen travel market

Rank	State where hunting took place	% of total traveling hunter market	Rank	State where hunting took place	% of total traveling hunter market
<u>Nationally</u>			<u>Regionally</u>		
1	South Dakota	6%	10	New York	4%
2	Wisconsin	6%	12	Pennsylvania	3%
3	Colorado	5%	24	Maine	2%
4	Kansas	5%	33	Vermont	1%
5	Virginia	5%	42	New Hampshire	1%
6	Missouri	4%	44	Rhode Island	0.2%
7	Tennessee	4%	46	Massachusetts	0.2%
8	Georgia	4%	48	Connecticut	0.2%
9	Idaho	4%	49	New Jersey	0.02%
10	New York	4%			

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

Figure 6-5. Maine's penetration rate into the traveling hunter market (ME hunter per 1,000 U.S. traveling hunters) in 2011

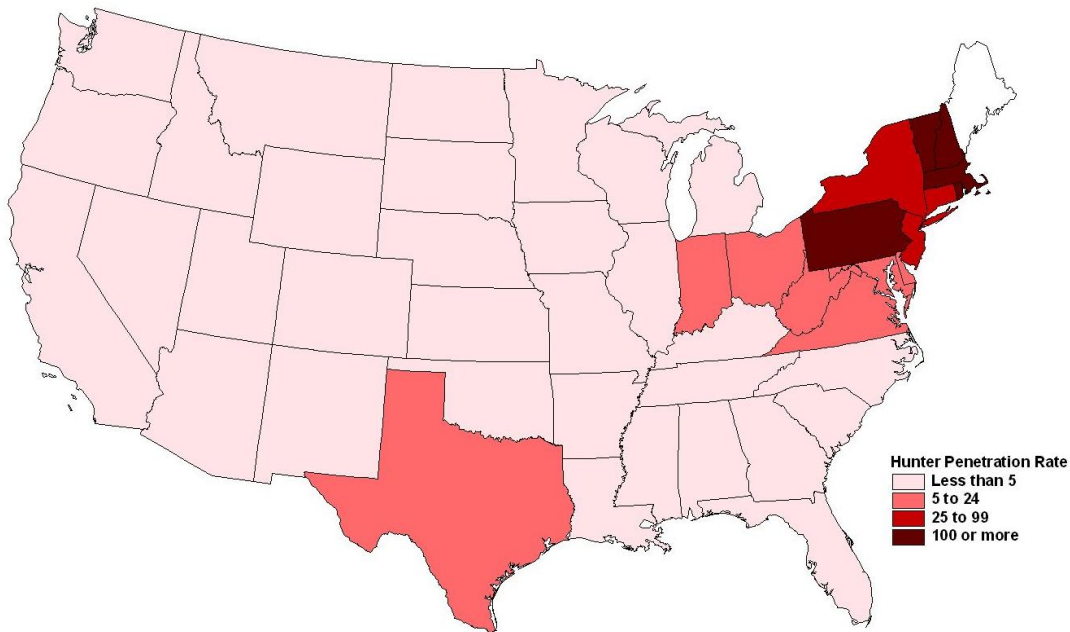


Table 6-6. Percent of the traveling hunter market captured by Maine

State of Residence	Traveling Hunters*	Hunted in Maine**	% traveling to Maine to hunt
Massachusetts	31,322	7,767	24.8%
New Hampshire	17,473	3,495	20.0%
Vermont	12,430	1,936	15.6%
Rhode Island	6,023	911	15.1%
Pennsylvania	18,664	2,479	13.3%
New York	15,605	1,622	10.4%
Connecticut	53,106	2,095	3.9%
New Jersey	46,891	1,508	3.2%
Virginia	62,057	490	0.8%
Florida	146,316	718	0.5%
Total	409,886	23,021	5.6%

*Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

**Source: Maine DIFW hunting license sales records, 2013.

Table 6-7. Top states within the Nation's fishing sportsmen travel market

Rank	State where fishing took place	% of traveling angler market	Rank	State where fishing took place	% of traveling angler market
<u>Nationally</u>			<u>Regionally</u>		
1	Florida	15%	6	New York	4%
2	Michigan	4%	9	New Jersey	3%
3	Wisconsin	4%	11	Pennsylvania	3%
4	North Carolina	4%	18	Massachusetts	2%
5	Alaska	4%	19	Maine	2%
6	New York	4%	23	Vermont	1%
7	Oregon	3%	31	Rhode Island	1%
8	Minnesota	3%	38	New Hampshire	1%
9	New Jersey	3%	40	Connecticut	1%
10	Missouri	3%			

Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

Figure 6-6. Maine's penetration rate into the traveling angler market (ME angler per 1,000 U.S. traveling angler) in 2011

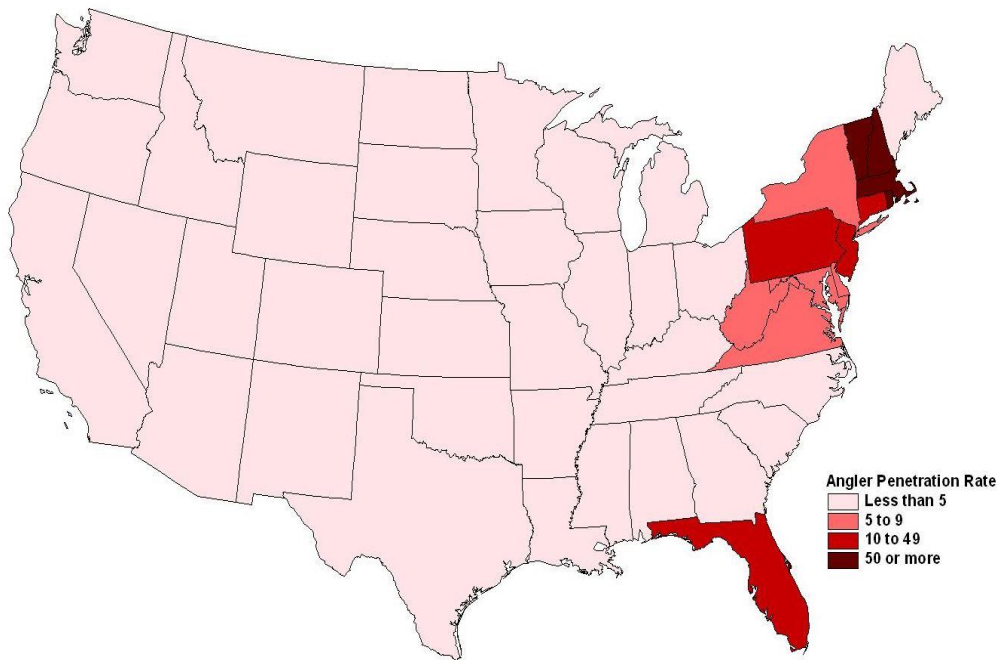


Table 6-8. Percent of the traveling angler market captured by Maine

State of Residence	Traveling Anglers*	Fished in Maine**	% traveling to Maine to fish
New Hampshire	57,615	9,463	16.4%
Vermont	19,415	2,007	10.3%
Rhode Island	27,945	2,000	7.2%
Massachusetts	174,739	4,284	2.5%
Connecticut	172,936	6,914	4.0%
Florida	149,314	2,698	1.8%
New Jersey	243,043	4,156	1.7%
Pennsylvania	311,119	4,234	1.4%
New York	390,923	4,284	1.1%
Virginia	170,325	1,791	1.1%
Total	1,717,375	41,831	2.4%

*Source: 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

**Source: Maine DIFW hunting license sales records, 2013.

Similarity index of the Nation's hunters and anglers to Maine's sportsmen

- Using the demographic and geographic characteristics of Maine's existing licensed sportsmen population, it is possible to identify other locations within the continental United States that fit the same profile using a tool developed by ESRI for their ArcGIS platform. The tool works by developing a "Similarity Index" value which can be viewed as the relative level of similarity between hunters or anglers in one location versus those hunters and anglers who have traveled to Maine to hunt and fish. A higher score indicates a higher similarity of the local population to the typical Maine licensed nonresident hunter or angler. The goal is to identify potential market areas from which to recruit new Traveling hunter and anglers.
- The similarity of the population in the Northeast to Maine's hunters and anglers is not surprising given that this area where the state has the largest degree of market penetration. There is also a high degree of similarity across the central US and the Northwest US. In fact, at first glance Figures 6-7 and 6-8 show "high" levels of similarity across the nation which in turn suggest that there are a number of potential market areas to explore.
- However, propensity to travel also plays a key role in Maine's ability to recruit sportsmen from within a particular state or region. Distance can also play a key role in Maine's ability to successfully penetrate a market and recruit Traveling sportsmen.
- In other words, it is not necessarily practical to devote time and energy to achieve a high level of penetration into the northern California market when many other hunting or fishing destinations are geographically closer. Areas within the Northeast and the Mid-Atlantic present opportunities to recruit new Traveling sportsmen and retain Maine's nonresident licensed sportsmen given their proximity and propensity to travel.

Figure 6-7. Maine hunter similarity index

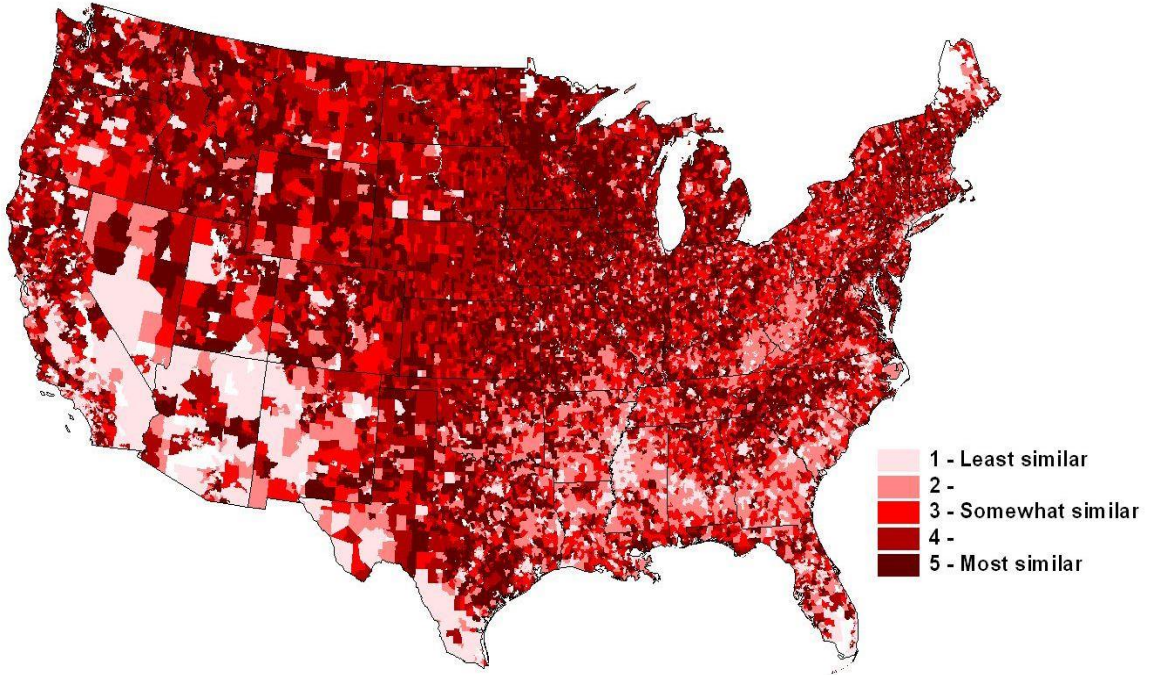
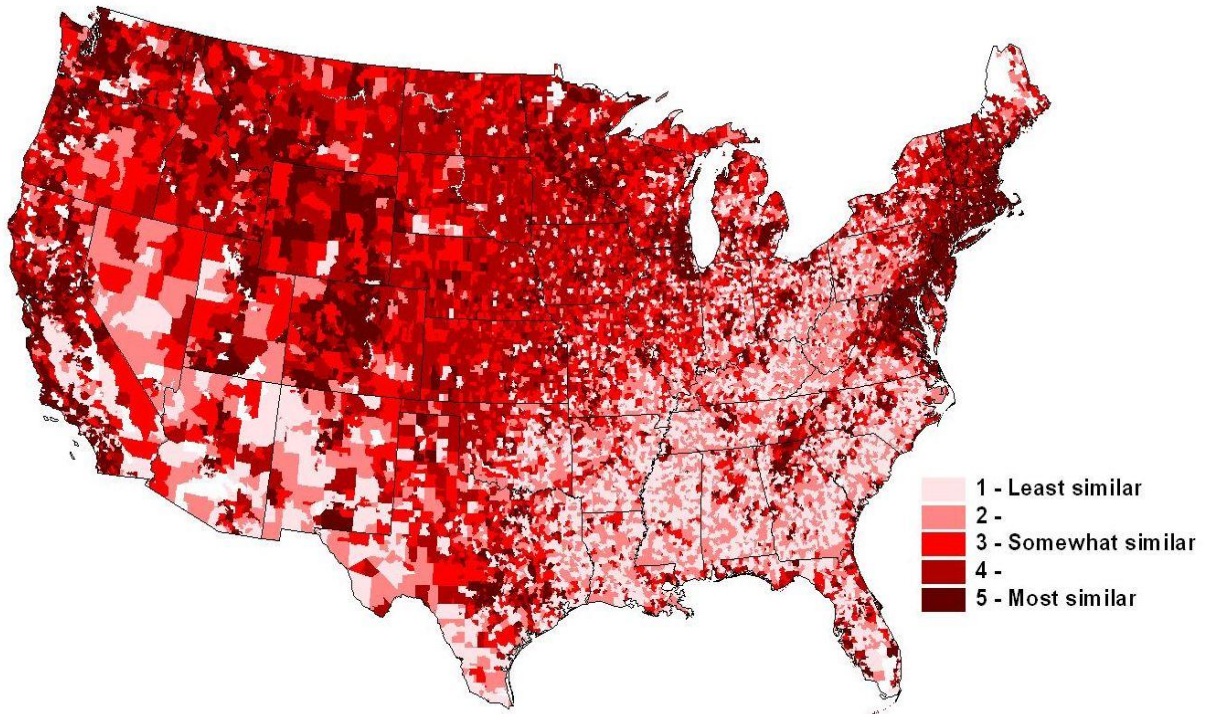


Figure 6-8. Maine angler similarity index



Chapter 7 Trip characteristics when hunting and fishing occurred

This section identifies the typical characteristics of hunting and fishing trips by licensed and traveling sportsmen and women. Results identify the experience people are planning for and how they plan it. Trip characteristics include party size and composition; species sought; trip length and type (e.g., vacation, business, etc.); advance planning timeframe; accommodations; and booking characteristics.

Results include two different types of hunting and fishing trips: 1) when the primary purpose was hunting or fishing and 2) when hunting or fishing was a secondary purpose. To a large extent the questions posed in each of the surveys allow for aggregation of these two groups and reflect all trips when hunting and fishing occurred. However, in those instances when the questions do not allow for aggregation, the results are presented separately and notation of the purpose reflected in the results is included.

Travel party size and companions

- In general, Maine's licensed hunters and anglers go hunting and fishing with other friends or family members. Among Maine's licensed hunters, it is more likely that the travel consists of someone other than their spouse or children regardless of the length of the trip, one-day or multi-day (Table 7-1 through 7-4). Traveling hunters also hunt with companions; however, they are more likely to bring their children when they travel to hunt, relative to Maine's licensed resident or nonresident hunters (Table 7-5 and 7-6).
- Among anglers, whether Maine licensed anglers or Traveling anglers, they are more likely to be accompanied by close family members such as a spouse, significant other, or children (Table 7-7 through 7-12).

Table 7-1. Maine's Licensed Hunters: Hunting multi-day: Typically, did you hunt [selected species] by yourself or with other people?

Response	Residents	Nonresidents
I typically hunted alone	29%	14%
I usually hunted with others	71%	86%
Total	100%	100%
Respondents	2,278	2,113

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-2. Maine's Licensed Hunters: Typically, who accompanied you on your multiple-day trip(s) [in/to] Maine in 2013 where the primary reason of the trip(s) was to hunt [selected species]?

Option	Residents	Nonresidents
my spouse, girlfriend or boyfriend	19%	6%
children	11%	6%
other family or friends	82%	89%
Other	3%	6%
Respondents	1,642	1,795

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-3. Maine's Licensed Hunters: Hunting one-day: Typically, did you hunt [selected species] by yourself or with other people? And, who accompanied you?

Response	Residents	Nonresidents
I typically hunted alone	31%	27%
Usually with other people	69%	73%
Total	100%	100%
Respondents	1,693	180

Hunting companions	Residents	Nonresidents
my spouse, girlfriend or boyfriend	16%	6%
children	15%	8%
other family or friends	83%	76%
Other	4%	6%
Respondents	1,103	131

Note: Results only reflect trips when hunting was primary purpose. Companion table for secondary purpose is Table 7-4 below.

Table 7-4. Maine's Licensed Hunters: Typically, who accompanied you on your one-day [selected species] hunting trip(s) while you were [away from home / visiting Maine] for other reasons during 2013?

Option	Residents	Nonresidents
I typically hunted alone	30%	18%
my spouse, girlfriend or boyfriend	18%	7%
children	8%	3%
other family or friends	54%	63%
Other	1%	6%
Respondents	359	228

Note: Results only reflect trips when hunting was secondary purpose.

Table 7-5. Traveling Hunters within Maine’s market region who have not hunted in Maine: Did you hunt alone or were you accompanied by other people?

Response	US/Canada Residents
I hunted alone	18%
I hunted with others	82%
Total	100%
Respondents	99

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-6. Traveling Hunters within Maine’s market region who have not hunted in Maine: Who accompanied you on your most recent experience hunting outside of your home state or province? (check all that apply)

Option	US/Canada Residents
My spouse, girlfriend or boyfriend	16%
Children	29%
Other family or friends	66%
Coworkers	3%
Other, please explain	2%
Respondents	77

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-7. Maine’s Licensed Anglers: Fishing multi-day: Typically, did you fish [selected type] by yourself or with other people? And, who accompanied you?

Response	Residents	Nonresidents
I typically fished alone	11%	11%
I usually fished with others	89%	89%
Total	100%	100%
Respondents	2,953	3,515
Fishing companion	Residents	Nonresidents
my spouse, girlfriend or boyfriend	20%	11%
children	67%	76%
other family or friends	6%	4%
Other	7%	6%
Respondents	2,491	3,087

Note: Results only reflect trips when fishing was primary purpose. Companion table for secondary purpose is Table 7-8 below.

Table 7-8. Maine’s Licensed Anglers: Typically, did you go [open water fishing in freshwater / ice fishing] alone or were you accompanied by other people? And, who went fishing with you?

Response	Residents	Nonresidents
I typically fished alone	18%	17%
I usually fished with others	82%	83%
Total	100%	100%
Respondents	305	701

Fishing companion	Residents	Nonresidents
Usually with children	21%	28%
Usually I fished with other family or friends	59%	69%
Fished with coworkers	7%	3%
Other, please explain	9%	3%
Respondents	239	541

Note: Results only reflect trips when fishing was secondary purpose.

Table 7-9. Maine’s Licensed Anglers: Typically, did you go [open water fishing in freshwater / ice fishing] by yourself or with other people on one-day trips?

Response	Residents	Nonresidents
I typically fished alone	13%	16%
Usually with other people	87%	84%
Total	100%	100%
Respondents	2,734	551

Option	Residents	Nonresidents
my spouse, girlfriend or boyfriend	32%	20%
children	25%	14%
other family or friends	75%	72%
Other	6%	8%
Respondents	2,208	460

Note: Results only reflect trips when fishing was primary purpose. Companion table for secondary purpose is Table 7-10 below.

Table 7-10. Maine’s Licensed Anglers: *Typically, who accompanied you on your one-day [open water/ice] fishing trip(s) while you were [visiting Maine/away from home] for other reasons during 2013?*

Option	Residents	Nonresidents
my spouse, girlfriend or boyfriend	34%	24%
children	21%	18%
other family or friends	65%	71%
co-workers	7%	3%
Other	5%	3%
Respondents	744	1,245

Note: Results only reflect trips when fishing was secondary purpose.

Table 7-11. Traveling Anglers within Maine’s market region who have not fished in Maine: *Did you fish alone or were you accompanied by other people?*

Response	US/Canada Residents
I fished alone	21%
I fished with others	79%
Total	100%
Respondents	434

Note: Results reflect trips when fishing was primary or secondary purpose.

Table 7-12. Traveling Anglers within Maine’s market region who have not fished in Maine: *Who accompanied you on your most recent experience fishing outside of your home state or province? (check all that apply)*

Option	US/Canada Residents
My spouse, girlfriend or boyfriend	56%
Children	33%
Other family or friends	65%
Coworkers	6%
Other, please explain	1%
Respondents	355

Note: Results reflect trips when fishing was primary or secondary purpose.

Species or water type pursued

Species or water type pursued

- Maine’s licensed hunters who identify themselves as having “taken a trip” are most commonly moose hunters (Table 7-13). While only 30% of deer hunters identify themselves as having “taken a trip” to hunt deer in Maine during 2013. These results are likely highly influenced by the respondent’s perceived definition of what would constitute a trip. (Additional detailed information about species pursued among Maine’s licensed sportsmen can be found in the two companion reports). Traveling hunters most frequently pursued deer when on a hunting trip (Table 7-15).
- Traveling anglers most frequently fished on open water on their most recent trip outside of their home state or province (Table 7-16 and 7-17). And, they fished for Bass or Trout.

Table 7-13. Maine’s Licensed Hunters: Did you take any trips [in/to] Maine during 2013 for the primary reason of hunting [selected species]?

Response	bear	deer	migratory waterfowl	moose	small game	turkey	upland game bird
<u>Residents</u>							
Yes	52%	30%	49%	86%	45%	34%	55%
No	48%	70%	51%	14%	55%	66%	45%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>363</i>	<i>1,859</i>	<i>372</i>	<i>209</i>	<i>619</i>	<i>542</i>	<i>951</i>
<u>Nonresidents</u>							
Yes	83%	89%	73%	93%	67%	71%	79%
No	17%	11%	27%	7%	33%	29%	21%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>475</i>	<i>997</i>	<i>108</i>	<i>75</i>	<i>286</i>	<i>74</i>	<i>485</i>

Note: Results reflect only trips when primary purpose was hunting.

Table 7-14. Maine’s Licensed Hunters: When you hunted moose in Maine during 2013, were you

Option	Residents	Nonresidents
the permittee (permit holder)	47.9%	55.7%
a subpermittee	24.4%	33.4%
a member of the moose hunting party	31.4%	16.6%
<i>Respondents</i>	<i>458</i>	<i>140</i>

Note: Results reflect only trips when primary purpose was hunting.

Table 7-15. Traveling Hunters within Maine’s market region who have not hunted in Maine: What did you hunt for on your most recent trip outside your home state or province? (check all that apply)

Option	US/Canada Residents
Deer	82%
Upland game birds (ruffed grouse (partridge), woodcock, pheasant)	9%
Turkey	31%
Migratory waterfowl (ducks or geese)	6%
Small game (rabbit, bobcat, coyote, raccoon, red fox, squirrel, crow, other small game)	13%
Bear	8%
Moose	14%
Caribou	4%
Elk	20%
Other, please explain	6%
Respondents	99

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-16. Traveling Anglers within Maine’s market region who have not fished in Maine: What type of fishing did you do on your most recent trip outside of your home state or province? (check all that apply)

Option	US/Canada Residents
Fished in freshwater (lakes, ponds, brooks, streams, rivers)	97%
Ice fished on freshwater (lakes, ponds, brooks, streams, rivers)	16%
Fished in saltwater (coastal bays, tidal portions of brooks, streams and rivers, or ocean waters off the coast)	26%
Respondents	434

Note: Results reflect trips when fishing was primary or secondary purpose.

Table 7-17. Traveling Anglers within Maine’s market region who have not fished in Maine: Did you fish for...? (select all that apply)

Option	US/Canada Residents
Trout	56%
Salmon	31%
Bass	68%
Crappie	22%
Pike or Muskie	29%
Catfish	30%
Other type of fish	26%
Respondents	434

Note: Results reflect trips when fishing was primary or secondary purpose.

Other activities

- During trips when hunting occurred, the majority of Maine’s licensed sportsmen and Traveling sportsmen say that they also spent time enjoying the scenery, sightseeing, and relaxing (Table 7-18 through 7-21). The same holds true for the majority of Maine’s licensed sportsmen and Traveling sportsmen during trips when fishing occurred (Table 7-22 through 7-24).

Table 7-18. Maine’s Licensed Hunters: Considering all of your trips [in/to] Maine when the primary purpose was for hunting [selected species], what other activities did you participate in during your trip(s) in 2013?

Option	Residents	Nonresidents
Business	5%	4%
Enjoying the scenery	61%	56%
Family/personal event	8%	6%
Hunting other types of wildlife	41%	20%
Leaf peeping, viewing foliage	25%	9%
Freshwater fishing	24%	16%
Shopping	9%	23%
Visiting family or friends	29%	32%
Resting, relaxing, unwinding	63%	63%
Other outdoor activity	30%	26%
Other	4%	4%
Respondents	2,153	1,904

Note: Results reflect only trips when primary purpose was hunting.

Table 7-19. Maine's Licensed Hunters: On trips in 2013 when hunting was a secondary purpose, what was the primary reason for [your trips / visiting Maine]?

Response	Residents	Nonresidents
Staying at a camp, summer home, or seasonal residence	42%	37%
Business	12%	3%
Vacation, but hunting was not the primary reason for the trip	11%	22%
Attending a special event (concert, fair, festival, sports)	1%	0%
Attending a personal special event (wedding, reunion, etc.)	6%	7%
Other	28%	31%
Total	100%	100%
Respondents	654	625

Note: Results reflect only trips when secondary purpose was hunting.

Table 7-20. Traveling Hunters within Maine's market region who have not hunted in Maine: What other activities did you participate in on your most recent trip during which you went hunting outside of your home state or province? (check all that apply)

Option	US/Canada Residents
Business	4%
Enjoying the scenery, sightseeing	42%
Family/personal event (wedding, reunion, etc.)	10%
Leaf peeping, viewing foliage	5%
Freshwater fishing	29%
Shopping	5%
Visiting family or friends	17%
Resting, relaxing, unwinding	57%
Other outdoor activities	20%
Other	9%
Respondents	70

Note: Results reflect only trips when primary purpose was hunting.

Table 7-21. Traveling Hunters within Maine’s market region who have not hunted in Maine: What was the primary [or secondary]* reason for your most recent trip during which you also went hunting outside of your home state or province?

Response	US/Canada Residents
Vacation, hunting was the reason for the trip	75%
Business	2%
Vacation, but hunting was not the primary reason for the trip	15%
Attending a personal special event (wedding, reunion, etc.)	4%
Staying at a camp, summer home, or seasonal residence	1%
Other	3%
Total	100%
Respondents	99

*Results reflect trips when primary or secondary purpose was hunting.

Table 7-22. Maine’s Licensed Anglers: On these trips in 2013 when fishing was a secondary purpose, what was the primary reason for [your trips / visiting Maine]?

Response	Residents	Nonresidents
Staying at a camp, summer home, or seasonal residence	44%	31%
Business	3%	2%
Vacation, but fishing was not the primary reason for the trip	28%	49%
Attending a special event (concert, fair, festival, sports,	2%	0%
Attending a personal special event (wedding, reunion, etc.)	6%	6%
Other	16%	11%
Total	100%	100%
Respondents	1,788	3,332

Note: Results reflect only trips when secondary purpose was fishing.

Table 7-23. Traveling Anglers within Maine's market region who have not fished in Maine: What other activities did you participate in during your most recent trip during which you went fishing outside of your home state or province? (check all that apply)

Option	US/Canada Residents
Business	6%
Enjoying the scenery, sightseeing	71%
Family/personal event (wedding, reunion, etc.)	22%
Leaf peeping, viewing foliage	6%
Hunting	6%
Shopping	23%
Visiting family or friends	24%
Resting, relaxing, unwinding	59%
Other outdoor activities	21%
Other	0%
Respondents	211

Note: Results reflect only trips when primary purpose was fishing.

Table 7-24. Traveling Anglers within Maine's market region who have not fished in Maine: What was the primary reason [or secondary reason]* for your most recent trip during which you also went fishing outside of your home state or province?

Response	US Residents	Canada Residents
Vacation, fishing was the primary reason for the trip	51%	35%
Business	3%	2%
Vacation, but fishing was not the primary reason for the trip	36%	41%
Attending a personal special event (wedding, reunion, etc.)	1%	5%
Staying at a camp, summer home, or seasonal residence	4%	12%
Other	5%	5%
Total	100%	100%
Respondents	360	74

*Results reflect trips when primary and secondary purpose was fishing.

Location visited by traveling sportsmen

- Roughly 54% of Traveling hunters who reside within Maine’s market region visited other New England States and Mid-Atlantic States (Table 7-25).
- Roughly 45% of traveling anglers who reside within Maine’s market region visited other New England States and Mid-Atlantic States (Table 7-26).

Table 7-25. Traveling Hunters within Maine’s market region who have not hunted in Maine: *Where did you go on your most recent trip?*

Response	US/Canada Residents
Mid-Atlantic states (NJ, NY, PA)	23%
Maine	0%
New England state other than Maine (NH, MA, RI, VT, CT)	31%
Colorado	4%
Montana	4%
Wyoming	13%
Other U S state	18%
Canada - New Brunswick, Nova Scotia, Prince Edward Island	4%
Canada - Newfoundland and Labrador	0%
Canada - Quebec	2%
Canada - other province	0%
Other country	0%
Total	100%
Respondents	99

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-26. Traveling Anglers within Maine’s market region who have not fished in Maine: *Where did you go on the most recent trip?*

Response	US/Canada Residents
Mid-Atlantic states (NJ, NY, PA)	29%
Maine	0%
New England state other than Maine (NH, MA, RI, VT, CT)	16%
Florida	19%
Montana	2%
Louisiana	2%
Other U S state	17%
Canada - New Brunswick, Nova Scotia, Prince Edward Island	2%
Canada - Newfoundland and Labrador	1%
Canada - Quebec	2%
Canada - other province	9%
Other country	1%
Total	100%
Respondents	434

Note: Results reflect trips when fishing was primary or secondary purpose.

Advanced planning timeframe

- Maine’s licensed resident hunters typically take one month or less to plan for a hunting trip (Table 7-27). Both Maine’s licensed nonresident and Traveling hunters can take anywhere between one month to one year to plan for a hunting trip (Table 7-27 and 7-28).
- Maine’s licensed resident anglers also typically take one month or less to plan for a freshwater fishing trip (Table 7-29). Both Maine’s licensed nonresident and Traveling anglers can take anywhere between one month to one year to plan for a fishing trip (Table 7-29 and 7-30).

Table 7-27. Maine’s Licensed Hunters: *How far in advance of your trip do you start to make plans?*

Response	Residents	Nonresidents
Less than a week	38%	5%
2 to 4 weeks	31%	13%
1 to 6 months	22%	41%
6 to 12 months	9%	36%
More than a year	1%	5%
Total	100%	100%
Respondents	2,150	1,923

Note: Results reflect only trips when primary purpose was hunting.

Table 7-28. Traveling Hunters within Maine’s market region who have not hunted in Maine: How far in advance of your trip did you start to make plans?

Response	US/Canada Residents
Less than a week	6%
2 to 4 weeks	31%
1 to 6 months	32%
6 to 12 months	26%
More than a year	6%
Total	100%
Respondents	99

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-29. Maine’s Licensed Anglers: How far in advance of your trip do you start to make plans?

Response	Residents	Nonresidents
Less than a week	50%	6%
2 to 4 weeks	30%	17%
1 to 6 months	16%	52%
6 to 12 months	4%	23%
More than a year	0%	2%
Total	100%	100%
Respondents	2,992	3,512

Note: Results reflect only trips when primary purpose was fishing.

Table 7-30. Traveling Anglers within Maine’s market region who have not fished in Maine: How far in advance of your trip did you start to make plans?

Response	US/Canada Residents
Less than a week	15%
2 to 4 weeks	25%
1 to 6 months	42%
6 to 12 months	14%
More than a year	2%
Total	100%
Respondents	434

Note: Results reflect trips when fishing was primary or secondary purpose.

Trip Length

- Among Maine’s licensed resident hunters who take multi-day trips a trip length of 1 to 3 days is most common (Table 7-31). Maine’s licensed nonresident hunters can spend anywhere between 1 and 7 days away from home.
- Traveling hunters are very diverse across trip lengths (Table 7-32). While the most common trip length is 6 to 7 days, roughly 20% of hunters indicated that they took shorter trips (between 1 day and 5 days) and longer trips (more than 7 days).
- Among Maine’s licensed resident anglers who take multi-day trips a trip length of 1 to 3 days is also most common (Table 7-33). Maine’s licensed nonresident anglers often spend between 1 and 5 days away from home.
- Traveling anglers are most commonly taking 1 to 3 day trips or 6 to 7 day trips, perhaps long weekends or vacation weeks, to go fishing (Table 7-34).

Table 7-31. Maine’s Licensed Hunters: Trip duration

Response	Residents	Nonresidents
1 to 3 days	65%	30%
4 to 5 days	24%	27%
6 to 7 days	8%	28%
More than 7 days	3%	14%
Total	100%	100%
Respondents	1,182	1,750

Note: Results reflect trips when hunting was primary or secondary purpose. Calculated using reported total days and total trips from multi-day trip respondents.

Table 7-32. Traveling Hunters within Maine’s market region who have not hunted in Maine: Including travel time, how long was the trip?

Response	US/Canada Residents
Less than one day (I left and returned on the same day)	3%
1 to 3 days	35%
4 to 5 days	21%
6 to 7 days	22%
More than 7 days	19%
Total	100%
Respondents	99

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-33. Maine's Licensed Anglers: Trip duration

<i>Response</i>	<i>Residents</i>	<i>Nonresidents</i>
1 to 3 days	69%	49%
4 to 5 days	26%	28%
6 to 7 days	4%	14%
More than 7 days	2%	9%
Total	100%	100%
Respondents	1,722	3,455

Note: Results reflect trips when fishing was primary or secondary purpose.
 Calculated using reported total days and total trips from multi-day trip respondents.

Table 7-34. Traveling Anglers within Maine's market region who have not fished in Maine: Including travel time, how long was the trip?

<i>Response</i>	<i>US/Canada Residents</i>
Less than one day (I left and returned on the same day)	17%
1 to 3 days	26%
4 to 5 days	19%
6 to 7 days	20%
More than 7 days	17%
Total	100%
Respondents	434

Note: Results reflect trips when fishing was primary or secondary purpose.

Accommodations

- Maine’s licensed hunters who took a multi-day hunting trip most commonly stay in unpaid accommodations such as a relative’s or associate’s lodging (43% residents and 37% nonresidents) or their own lodging (18% residents and 14% nonresidents) (Table 7-35). Those who do stay in paid accommodations book their accommodations over the phone or directly with the lodge (Table 7-36).
- Traveling hunters who take a trip that includes hunting typically stay in paid accommodations, hotel, motel, or resort, specifically, and make their reservations online (Table 7-37 and 7-38).
- Thirty five percent of Maine’s resident anglers stay in unpaid accommodations (second home or a relative’s home) when traveling to fish (Table 7-39 and 7-40). Maine’s nonresident anglers also rely on relative’s homes or a rented cabin, condo, or vacation home. Those who do stay in paid accommodations book their accommodations over the phone (residents) or online (residents).
- Traveling anglers typically stay in paid accommodations, hotel, motel, or resort, specifically, and make their reservations online (Table 7-41 and 7-42).

Table 7-35. Maine’s Licensed Hunters: Where did you stay? (check all that apply)

Option	Residents	Nonresidents
Paid Accommodations	34%	53%
Hotel, motel, resort	6%	7%
Inn or bed and breakfast	1%	2%
Rented lodging	15%	14%
Campground or RV part	6%	1%
Sporting or wilderness camp or lodge	11%	31%
Other paid accommodation	1%	2%
Unpaid Accommodations	69%	51%
Lodging owned by respondent	24%	14%
Relative or associate's lodging	47%	35%
A free campground or campsite	8%	1%
Other unpaid accommodation	6%	3%
Respondents	1,272	1,876

Table 7-36. Maine’s Licensed Hunters: Hunting multi-day: How do you usually book your hotel/lodge/guide/travel?

Option	Residents	Nonresidents
Through a travel agency	1%	0%
Direct with a lodge/guide	32%	54%
Online	14%	15%
Over the phone	39%	26%
Via email	7%	5%
Other	21%	11%
Respondents	420	905

Table 7-37. Traveling Hunters within Maine’s market region who have not hunted in Maine: Where did you stay? (check all that apply)

Option	US/Canada Residents
Paid Accommodations	63%
Hotel, motel, resort	29%
Inn or bed and breakfast	7%
Rented cabin, cottage, condo, vacation home	19%
Campground or RV park	4%
Sporting or wilderness camp or lodge	13%
Other paid accommodation	1%
Unpaid Accommodations	45%
My own second home, cabin, cottage, condo	8%
At the home, cabin, cottage or condo of a friend, relative or associate	27%
A free campground or campsites	2%
Other free accommodation	11%
Respondents	94

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-38. Traveling Hunters within Maine’s market region who have not hunted in Maine: How did you book your accommodations? (check all that apply)

Option	US/Canada Residents
Through a travel agency	9%
Direct with a lodge/guide	15%
Booked through an outdoor outfitter	8%
Booked online	37%
Booked over the phone	11%
Booked via email	1%
Booked at a hunting/outdoor show or expo	0%
Other	30%
Respondents	94

Note: Results reflect trips when hunting was primary or secondary purpose.

Table 7-39. Maine's Licensed Anglers: Where did you stay? (check all that apply)

Option	Residents	Nonresidents
Paid Accommodations	49%	70%
Hotel, motel, resort	5%	10%
Inn or bed and breakfast	3%	2%
Rented lodging	24%	28%
Campground or RV part	14%	18%
Sporting or wilderness camp or lodge	11%	20%
Other paid accommodation	1%	0%
Unpaid Accommodations	51%	31%
Lodging owned by respondent	16%	5%
Relative or associate's lodging	31%	25%
A free campground or campsite	17%	5%
Other unpaid accommodation	10%	2%
Respondents	1,787	3,360

Table 7-40. Maine's Licensed Anglers: Fishing multi-day: How do you usually book your hotel/lodge/guide/travel?

Option	Residents	Nonresidents
Through a travel agency	0%	0%
Direct with a lodge/guide	22%	32%
Online	31%	38%
Over the phone	40%	20%
Via email	6%	7%
At fishing/outdoor show or expo	0%	1%
Other	18%	11%
Respondents	954	2,027

Table 7-41. Traveling Anglers within Maine’s market region who have not fished in Maine: Where did you stay? (check all that apply)

Option	US/Canada Residents
Paid Accommodations	75%
Hotel, motel, resort	40%
Inn or bed and breakfast	10%
Rented cabin, cottage, condo, vacation home	25%
Campground or RV park	14%
Sporting or wilderness camp or lodge	7%
Other paid accommodation	3%
Unpaid Accommodations	30%
My own second home, cabin, cottage, condo	6%
At the home, cabin, cottage or condo of a friend, relative or associate	21%
A free campground or campsites	3%
Other free accommodation	2%
Respondents	355

Note: Results reflect trips when fishing was primary or secondary purpose.

Table 7-42. Traveling Anglers within Maine’s market region who have not fished in Maine: How did you book your accommodations? (check all that apply)

Option	US/Canada Residents
Through a travel agency	9%
Direct with a lodge/guide	19%
Booked through an outdoor outfitter	8%
Booked online	39%
Booked over the phone	11%
Booked via email	4%
Booked at a fishing/outdoor show or expo	1%
Other	26%
Respondents	355

Note: Results reflect trips when fishing was primary or secondary purpose.

Chapter 8 Trips utilizing a Lodge or Guide

A select group of questions about the use of lodges, guides, and outfitters was asked of traveling sportsmen and women. The intent was to gain an understanding of the prevalence of lodge and guide use. For this effort, the terms lodge and outfitter are used. The percent of sportsmen who reported using a lodge is small. Caution is warranted when using these findings due to the limited sample size.

Lodging information

- Word of mouth plays an important role in the advertising process for hunting lodges (Table 8-1 and 8-2). Almost half (45%) of traveling hunters who use lodges learn about them through friends and family and another 39% use social media. They also turn to standard media outlets (magazine, website, and television) to learn about lodges. Standard media outlets play a larger role among traveling anglers. Sixty percent say they learned about their lodges on television, and roughly one third learned about lodges through a magazine or website.

Table 8-1. Traveling Hunters within Maine’s market region who have not hunted in Maine: How did you learn about the lodge? (check all that apply)

Option	US/Canada Residents
Advertisement in a magazine	35%
Advertisement on a website	38%
Advertisement on television	37%
Advertisement in other media	8%
Social media (for example, Facebook or Twitter)	39%
Heard about it at a sportsman’s show	12%
Recommended by friend or family	45%
Personal experience	16%
Magazine or online article	7%
Website listing	2%
Other	0%
Don’t recall	14%
Respondents*	26

* Estimates based on a small sample size

Table 8-2. Traveling Anglers within Maine’s market region who have not fished in Maine: How did you learn about the lodge? (check all that apply)

Option	US/Canada Residents
Advertisement in magazine	37%
Advertisement on a website	32%
Advertisement on television	60%
Advertisement in other media	20%
Social media (for example, Facebook or Twitter)	27%
Heard about it at a sportsman’s show	21%
Recommended by friend or family	29%
Personal experience	29%
Magazine or online article	17%
Website listing	24%
Other	6%
Don’t recall	0%
Respondents	34

Lodging type

- Traveling hunters who stay at a lodge most commonly stay in a separate cabin on premise near the main lodge building while traveling anglers most commonly stay in a room in the main lodge building (Table 8-3 and 8-4). Roughly one third of traveling hunters and two thirds of traveling anglers elect to use the full meal plan (Table 8-5 and 8-6).

Table 8-3. Traveling Hunters within Maine’s market region who have not hunted in Maine: Did you stay in:

Response	US/Canada Residents
Room(s) at the lodge	25%
Cabin(s) on premise	39%
Remote cabin(s) off premise	24%
My own recreational vehicle or tent	3%
Other	8%
Total	100%
Respondents*	26

* Estimates based on a small sample size

Table 8-4. Traveling Anglers within Maine's market region who have not fished in Maine: *Did you stay in:*

Response	US/Canada Residents
Room(s) at the lodge	57%
Cabin(s) on premise	29%
Remote cabin(s) off premise	8%
My own recreational vehicle or tent	6%
Other	0%
Total	100%
Respondents	34

Lodging meals

Table 8-5. Traveling Hunters within Maine's market region who have not hunted in Maine: *For meals, did you...?*

Response	US/Canada Residents
Use the full American plan (three meals daily)	37%
Take meals at the lodge at your convenience	34%
Provide your own meals	29%
Other, please specify:	0%
Total	100%
Respondents*	26

* Estimates based on a small sample size

Table 8-6. Traveling Anglers within Maine's market region who have not fished in Maine: *For meals, did you...?*

Response	US/Canada Residents
Use the full American plan (three meals daily)	61%
Take meals at the lodge at your convenience	25%
Provide your own meals	10%
Other, please specify:	3%
Total	100%
Respondents	34

Lodging services

- The types of services used by traveling sportsmen are dependent on the services available at the lodge. Hunting lodges were reported to offer fewer services relative to fishing lodges. Traveling hunters reported most commonly using cell phone service, a hunting license provided by or at the lodge, and guide services (Table 8-7). For traveling anglers, the most commonly utilized services included transportation, light housekeeping, and fish processing (Table 8-8).

Table 8-7. Traveling Hunters within Maine’s market region who have not hunted in Maine: What other services provided through the lodge did you use on your most recent trip?

Option	Used this service	Did not use this service	Not available at this lodge	Total
Light housekeeping service	23%	50%	28%	100%
Hunting guide	53%	39%	8%	100%
Boat rental/use	27%	44%	29%	100%
ATV rental/use	29%	42%	29%	100%
Transportation to and from lodge/camp (flight, car/truck, shuttle, boat)	35%	42%	22%	100%
Pilot to fly you to hunting locations	17%	54%	29%	100%
Package tours	23%	49%	28%	100%
Hunting license provided at the lodge	49%	42%	8%	100%
Meat processing	36%	55%	8%	100%
Internet access	33%	25%	42%	100%
Cell phone reception	48%	26%	25%	100%
Respondents*				26

* Estimates based on a small sample size

Table 8-8. Traveling Anglers within Maine’s market region who have not fished in Maine: What other services provided through the lodge did you use on your most recent trip?

Option	Used this service	Did not use this service	Not available at this lodge	Total
Light housekeeping service	79%	17%	4%	100%
Fishing guide	47%	51%	2%	100%
Boat rental/use	42%	56%	2%	100%
ATV rental/use	47%	36%	17%	100%
Transportation to and from lodge/camp (flight, car/truck, shuttle, boat)	80%	15%	5%	100%
Pilot to fly you to fishing locations	53%	37%	10%	100%
Package tours	42%	47%	12%	100%
Fishing license provided at the lodge	58%	25%	17%	100%
Meat/fish processing	71%	19%	10%	100%
Internet access	33%	50%	17%	100%
Cell phone reception	30%	53%	17%	100%
Respondents				34

Non-lodging services

- Hunting guides and boat rentals are the most commonly hired non-lodging service among traveling hunters (Table 8-9). Transportation to and from the lodge and boat rentals are the most commonly hired non-lodging service among traveling anglers (Table 8-10).

Table 8-9. Traveling Hunters within Maine’s market region who have not hunted in Maine: *Please indicate which services you hired directly from someone other than a lodge (check all that apply)*

Option	US/Canada Residents
Hunting guide	46%
Boat rental/use	43%
Transportation to and from lodge/camp (flight, car/truck, shuttle, boat)	22%
Pilot hired to fly you to hunting locations	9%
Other, please explain	14%
I did not hire any of the above services on my most recent trip	32%
Respondents*	26

* Estimates based on a small sample size

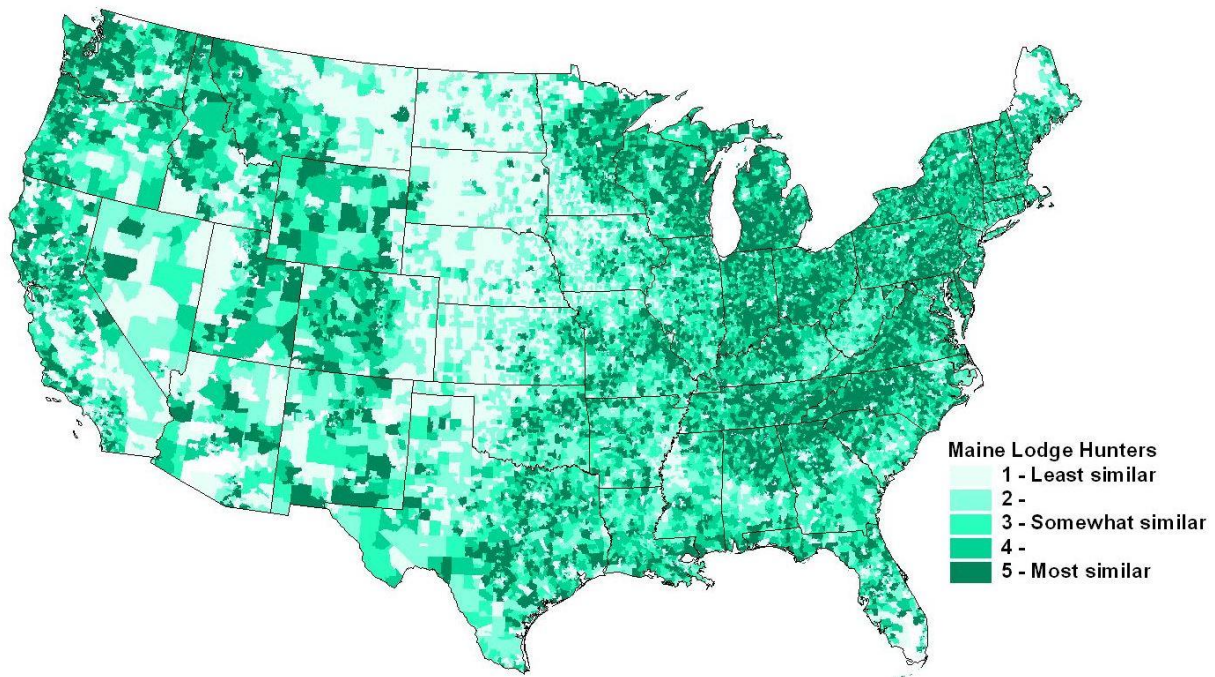
Table 8-10. Traveling Anglers within Maine’s market region who have not fished in Maine: *Please indicate which services you hired directly from someone other than a lodge (check all that apply)*

Option	US/Canada Residents
Fishing guide	25%
Boat rental/use	50%
Transportation to and from lodge/camp (flight, car/truck, shuttle, boat)	60%
Pilot hired to fly you to fishing locations	11%
Other, please explain	0%
I did not hire any of the above services on my most recent trip	8%
Respondents	34

Similarity index of the Nation's hunters and anglers to Maine's sportsmen who stayed at a lodge

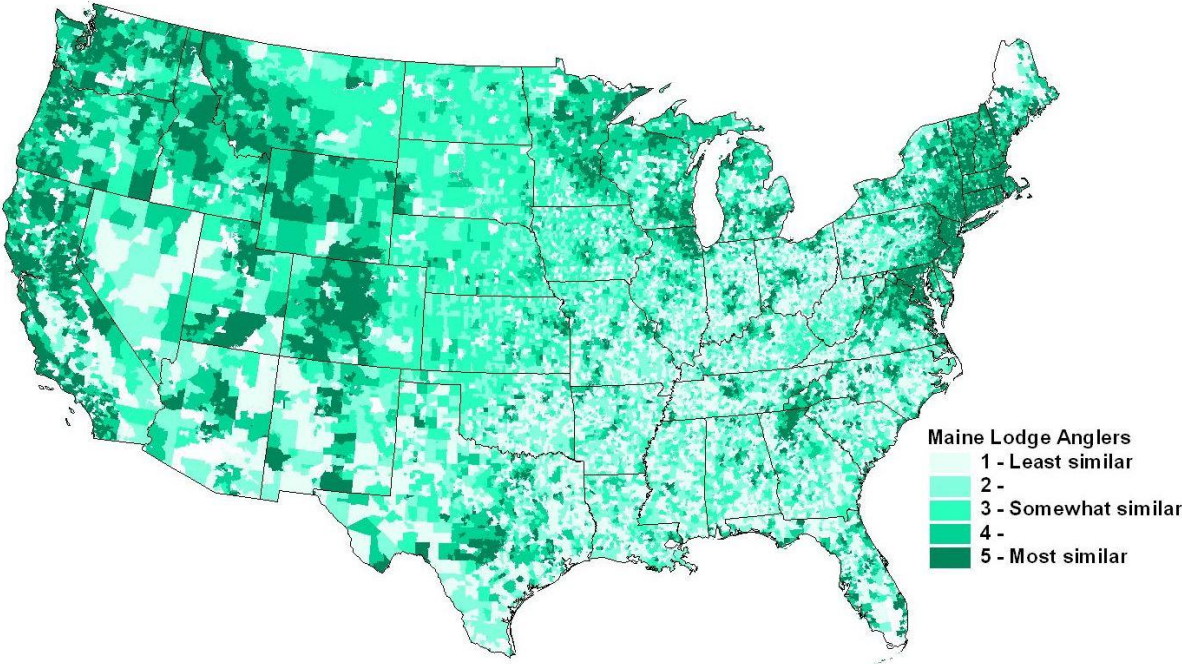
- Similar to the Similarity Index map presented earlier, the maps below reflect the degree to which the population of every zip code in the US compares to the profile of the typical traveling sportsmen and women who stayed in a lodge. Recall that a higher score indicates a higher similarity of the local population to the typical lodge user.
- The similarity of the population in the Northeast to Maine's hunters and anglers is not surprising given that this area where the state has the largest degree of market penetration (Figure 8-1 and 8-2). There is also a high degree of similarity concentrated in areas of the central US and the Northwest US.
- Again, it is not necessarily practical to devote time and energy to achieve a high level of recruitment from areas along the west coast which appear to have a high degree of similarity to Maine hunters and anglers who stayed in a lodge when many other hunting or fishing destinations are geographically closer. Areas within the Northeast and the Mid-Atlantic present opportunities to recruit new Traveling sportsmen and retain Maine's nonresident licensed sportsmen given their proximity and propensity to travel.

Figure 8-1. Similarity Index for hunters who spent an overnight at a lodge



Note: Map represents similarity to both traveling hunters as well as Maine hunters who reported spending a night at a lodge as part of a hunting trip.

Figure 8-2. Similarity Index for anglers who spent an overnight at a lodge



Note: Map represents similarity to both traveling anglers as well as Maine anglers who reported spending a night at a lodge as part of a fishing trip.

Sources of information about guide services

- The majority of traveling hunters and anglers do not hire a hunting or fishing guide, 76% and 85% respectively (Tables 8-11 and 8-12).
- As was the case with hunting lodges, word of mouth plays an important role in the advertising process for guides (Table 8-13). Twenty percent of hunters who use guides learn about them through friends and family and another 33% have personal experience. They also turn to standard media outlets (magazine, website, and television) to learn about the guide.
- Standard media outlets play a larger role among traveling anglers (Table 8-14). Forty one percent say they learned about the guide through a magazine or website. And, roughly one quarter learned about the guide through television. Another 20% have personal experience with the guide or the guide is recommended by the lodge.

Table 8-11. Traveling Hunters within Maine’s market region who have not hunted in Maine: *Did you hire a hunting guide on your most recent trip?*

Response	US/Canada Residents
Yes	24%
No	76%
Total	100%
Respondents	171

Table 8-12. Traveling Anglers within Maine’s market region who have not fished in Maine: *Did you hire a fishing guide on your most recent trip?*

Response	US/Canada Residents
Yes	15%
No	85%
Total	100%
Respondents	613

Table 8-13. Traveling Hunters within Maine’s market region who have not hunted in Maine: How did you learn about your guide? (check all that apply)

Option	US/Canada Residents
Advertisement in a magazine	39%
Advertisement on a website	17%
Advertisement on television	31%
Advertisement in other media	9%
Social media (for example, Facebook or Twitter)	10%
Recommended by lodge	7%
Heard about guide at a sportsman’s show	8%
Recommended by friend or family	20%
Personal experience	33%
Magazine or online article	7%
Website listing	8%
Other	4%
Don’t recall	0%
Respondents	42

Table 8-14. Traveling Anglers within Maine’s market region who have not fished in Maine: How did you learn about your guide? (check all that apply)

Option	US/Canada Residents
Advertisement in magazine	41%
Advertisement on a website	41%
Advertisement on television	25%
Advertisement in other media	18%
Social media (for example, Facebook or Twitter)	15%
Recommended by lodge	23%
Heard about guide at a sportsman’s show	11%
Recommended by friend or family	18%
Personal experience	22%
Magazine or online article	14%
Website listing	14%
Other	1%
Don’t recall	0%
Respondents	113

Booking your guide

- Guide bookings are made through the guide or the lodge for traveling hunters and anglers (Tables 8-15 and 8-16). Travel agencies also provide assistance with guide bookings for approximately one quarter of hunters and anglers.

Table 8-15. Traveling Hunters within Maine’s market region who have not hunted in Maine: How did you book your guide?

Response	US/Canada Residents
Through a travel agency	26%
Booked direct with a lodge/guide	58%
Booked through an outdoor outfitter	2%
Booked online	10%
Booked over the phone	2%
Booked via email	1%
Other, please explain	0%
Total	100%
Respondents	42

Table 8-16. Traveling Anglers within Maine’s market region who have not fished in Maine: How did you book your guide?

Response	US/Canada Residents
Through a travel agency	23%
Booked direct with a lodge/guide	40%
Booked through an outdoor outfitter	9%
Booked online	16%
Booked over the phone	9%
Booked via email	3%
Other, please explain:	0%
Total	100%
Respondents	113

Chapter 9 Satisfaction with the experience

Understanding how hunters and anglers, whether they be Maine's licensed or Traveling sportsmen, feel about their recent hunting and fishing experience can provide insight into what is good and what could use some improvement. In the case of Maine's licensed sportsmen, it shows managers the types of hunting and fishing that people are coming to Maine for, and whether they would return in the future to do so again or even recommend Maine to others for the same experience.

Here, Traveling sportsmen provide their level of satisfaction with their most recent experience. Also, licensed hunters and anglers provided their levels of satisfaction for their most recent hunter and/or fishing experiences in Maine and indicated the likelihood that they would return to hunt or fish Maine's woods and waters in the future. Hunters reported their satisfaction by species hunted (bear, deer, moose, small game, turkey, upland game birds, and migratory waterfowl). Anglers reported their satisfaction by type of freshwater fishing (open water or ice fishing). All Maine's licensed sportsmen and women were asked if they would return to hunt and/or fish in Maine again, and whether they would recommend Maine's hunting and fishing to others.

Traveling sportsmen were also asked a similar series of questions; exploring reasons why they had not hunted or fished in Maine, if they were likely to hunt or fish in Maine in the future, and if they would recommend Maine as a hunting and fishing destination to others. The extremely small respondent sample sizes unfortunately prevent the reporting of those results.

Overall satisfaction

- Eighty percent or more of all of Maine's licensed sportsmen are either very satisfied or satisfied by their typical hunting or fishing experience (Table 9-1 and 9-2). Licensed *nonresident* hunters tended to indicate a slightly higher level of satisfaction noted by the larger percentage of nonresident respondents selecting very satisfied relative to satisfied.
- Licensed *resident* hunters who pursued migratory waterfowl, deer, or upland game reported the lowest levels of satisfaction, relative to hunters pursuing other species. Similarly, licensed *nonresident* hunters who pursued migratory waterfowl, deer, and moose reported the lowest levels of satisfaction.
- Licensed *resident* ice fishermen showed a slightly lower level of satisfaction with their typical trip, relative to *resident* open water anglers. The opposite holds true for licensed *nonresidents*.
- Traveling Sportsmen who travel to hunt or fish were overwhelmingly satisfied with their most recent trip outside of their home state or province (Table 9-3 and 9-4).

Table 9-1. Maine's Licensed Hunters: Overall, how satisfied were you with your typical [selected species] hunting experience in Maine during 2013?

Response	bear	deer	migratory waterfowl	moose	small game	turkey	upland game bird
Residents							
Very Dissatisfied	3%	2%	2%	4%	1%	0%	3%
Dissatisfied	3%	11%	11%	6%	6%	8%	8%
Satisfied	38%	59%	65%	22%	66%	63%	60%
Very Satisfied	56%	28%	23%	67%	27%	29%	29%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>203</i>	<i>628</i>	<i>188</i>	<i>180</i>	<i>292</i>	<i>175</i>	<i>556</i>
Nonresidents							
Very Dissatisfied	0%	2%	2%	5%	0%	0%	2%
Dissatisfied	4%	9%	6%	6%	6%	5%	5%
Satisfied	25%	58%	47%	17%	44%	40%	46%
Very Satisfied	70%	30%	46%	73%	49%	55%	48%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>378</i>	<i>862</i>	<i>89</i>	<i>66</i>	<i>212</i>	<i>61</i>	<i>391</i>

Table 9-2. Maine's Licensed Anglers: Overall, how satisfied were you with your typical [open water fishing in freshwater / ice fishing] experience in Maine during 2013?

Response	ice fishing	open water fishing in freshwater
Residents		
Very Dissatisfied	1%	0%
Dissatisfied	6%	5%
Satisfied	48%	52%
Very Satisfied	45%	42%
<i>Total</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>872</i>	<i>2,303</i>
Nonresidents		
Very Dissatisfied	1%	1%
Dissatisfied	3%	6%
Satisfied	53%	43%
Very Satisfied	43%	50%
<i>Total</i>	<i>100%</i>	<i>100%</i>
<i>Respondents</i>	<i>424</i>	<i>4,087</i>

Table 9-3. Traveling Hunters within Maine’s market region who have not hunted in Maine:
Overall, how satisfied were you with your most recent experience hunting outside of your home state or province?

Response	%
Very Satisfied	74%
Satisfied	24%
Dissatisfied	2%
Very Dissatisfied	0%
Total	100%
Respondents	42

Table 9-4. Traveling Anglers within Maine’s market region who have not fished in Maine:
Overall, how satisfied were you with your most recent experience fishing outside of your home state or province?

Response	US Residents	Canada Residents
Very Satisfied	57%	38%
Satisfied	42%	59%
Dissatisfied	0%	2%
Very Dissatisfied	0%	1%
Total	100%	100%
Respondents	355	74

Likelihood of hunting or fishing in Maine in the future

- In the future, Maine’s licensed hunters are most likely to hunt deer and upland game birds (Figure 9-1). Licensed *resident* hunters are least likely to hunt bear and migratory waterfowl: licensed *nonresident* hunters are least likely to hunt migratory waterfowl and turkey.
- With respect to fishing, Maine’s licensed anglers – both *resident* and *nonresident* – are likely to fish Maine’s waters again in the future (Figure 9-2). Licensed *resident* anglers appear somewhat ambivalent about ice fishing, although they are more likely to engage in the sport than *nonresidents*, who are decidedly unlikely to ice fish in Maine in the future.

Figure 9-1. Maine’s Licensed Hunters: How likely are you to hunt in Maine in the future?

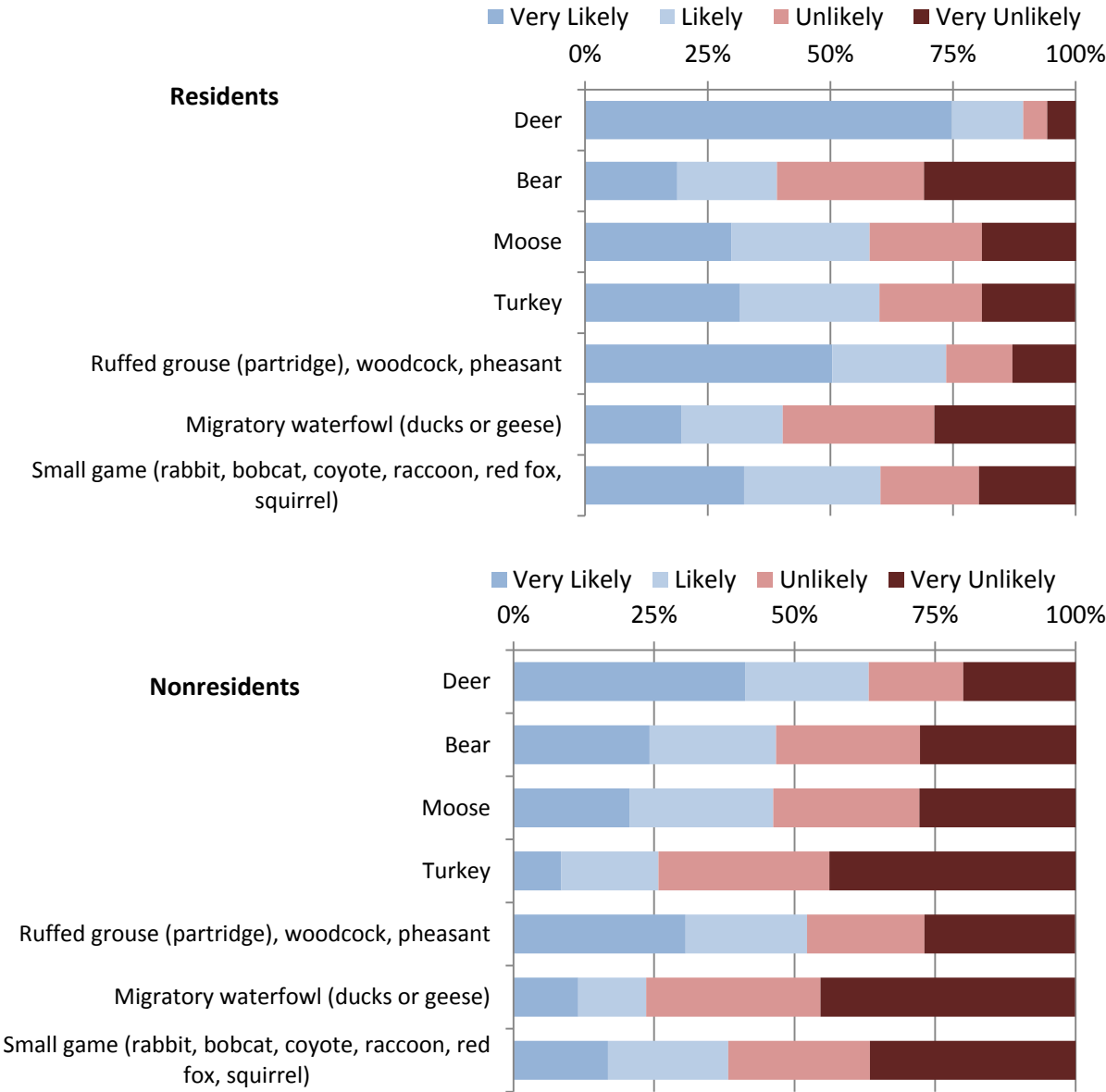
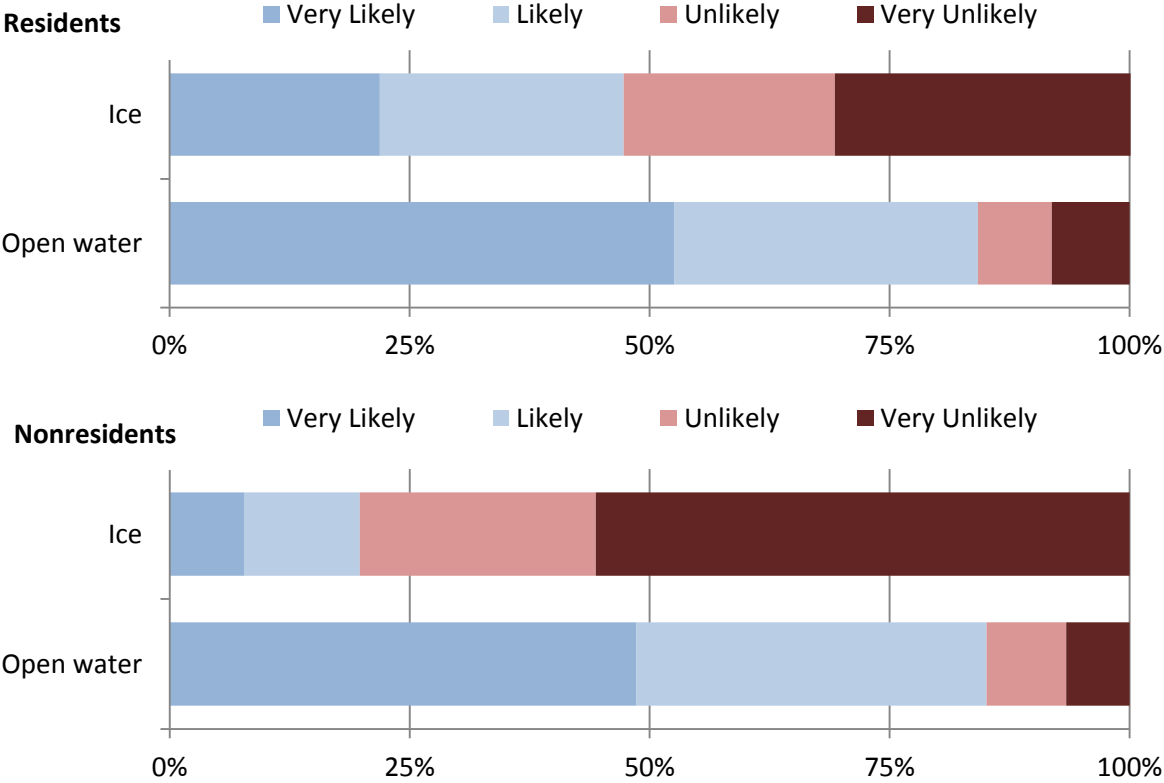


Figure 9-2. Maine’s Licensed Anglers: *How likely are you to fish on lakes, ponds, brooks, streams or rivers in Maine in the future?*



Likelihood of recommending Maine hunting or fishing to others

- An overwhelming majority of Maine’s licensed sportsmen and women are likely to recommend hunting and fishing in Maine to others (Figure 9-3 and 9-4).

Figure 9-3. Maine’s Licensed Hunters: *How likely are you to recommend hunting in Maine to others? (select one response)*

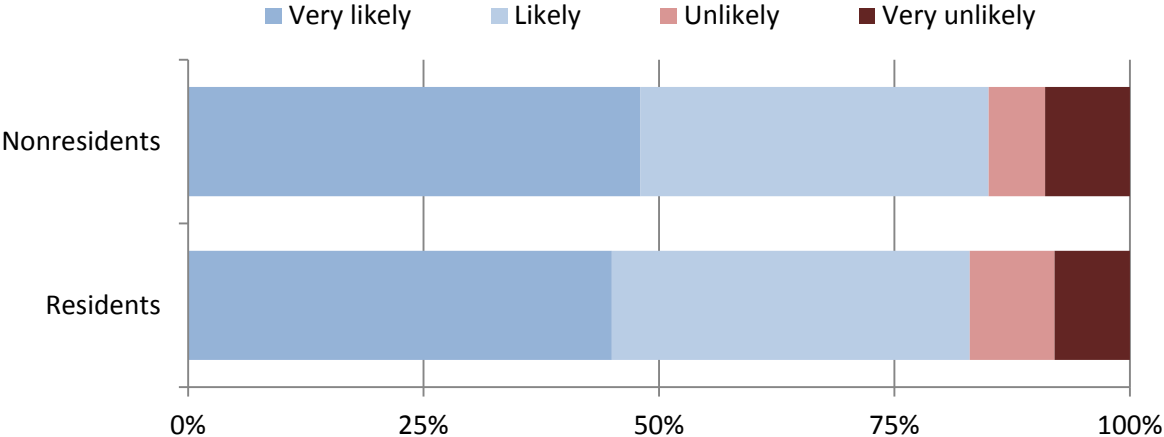
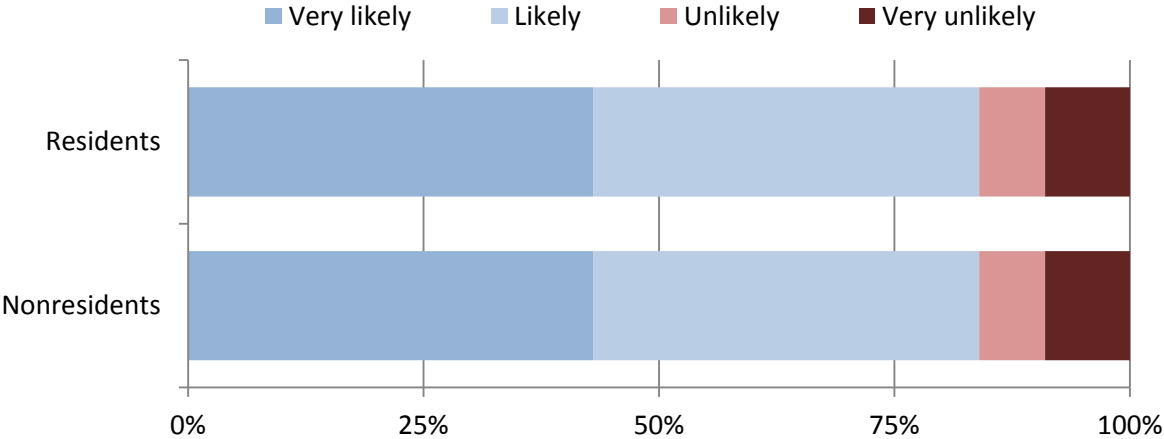


Figure 9-4. Maine’s Licensed Anglers: *How likely are you to recommend fishing in Maine to others? (select one response)*



Chapter 10 Key Insights

Insights from the Maine licensed and Traveling sportsmen surveys

- The state of Maine is well positioned as one of the “Best” destinations among Maine licensed hunters and anglers across a majority of attributes that are important to them - ranging from climate, safety, pricing, and amenities. Maine’s particular strengths among Traveling sportsmen are its attractive natural setting and its sense of safety.
 - The state’s natural amenities, beauty and sense of security or safety are also identified to be among the most important characteristics of a site that hunters and anglers say are important when making the decision to hunt or fish.
- The abundance of game species and the ability to target native populations are critical factors that influence destination choices. Maine Department of Inland Fisheries & Wildlife supports management and conservation efforts aimed at maintaining healthy populations of native species.
- Interestingly, one of the key destination factors for hunters and anglers is the remoteness of the location. However, travel distance also factors into their decision. The geographical size and travel distance to the more remote areas can be a challenge to bring sportsmen to the state. Among traveling sportsmen, it may be important to highlight other services in the area for non-sportsmen to influence the travel decision.
- Maine’s primary market from which to recruit visiting hunters and anglers is the Northeast, North Atlantic, and mid-Atlantic regions. Findings indicate that, given the size of the traveling sportsmen market in those areas, there remains growth potential to increase the state’s level of penetration within that market.
- Word-of-mouth is an important marketing tool among Maine’s sportsmen. Both hunters and anglers rely on recommendations from friends or family about hunting and fishing destinations. Maine sportsmen report a high degree of satisfaction with their hunting and fishing trips in Maine and are likely to recommend the experience to friends and family
- Traditional media outlets such as television, magazine, and online are also effective means to reach sportsmen. Top media titles consumed by sportsmen in Maine’s market area include The Bassmasters (TV), Field & Stream (magazine), and North American Hunting Club (online), among others.
- When not hunting or fishing, sportsmen and their travel companions are typically enjoying the opportunity to relax and unwind and to see the local sights.

Insights gained from other research about hunter and angler recruitment and retention

- Nationally, only 15% of anglers typically purchase a license five out of five years.¹¹ Among hunters, 35% of resident hunters and 7% of nonresident hunters typically purchase a licensed five out of five years.¹² And, the number of hunters and anglers had been on the decline since the early 1990's.¹³
- Sportsmen cite a variety of reasons for not hunting or fishing. The most commonly cited reasons are: not enough time, takes time away from family, and other obligations such as work or family.¹⁴ The argument of “not enough time” can actually be reflective of shifting preferences and other activities providing the same or more benefits than hunting or fishing had in the past.
- When hunters and anglers take a hiatus from the sport, the largest percent of sportsmen (41% for hunters and 38% for anglers) return within 3 years.¹⁵ A recent effort, spearheaded by the Recreational Boating and Fishing Foundation, focused on lowering the rate of lapsing anglers or shortening the time away from the sport through used communication and outreach to encourage anglers to renew their license. Findings show that that these efforts have not been effective at reducing the rate of lapsing by a significant degree.
- What competes for free time among sportsmen? Among anglers, the most commonly cited preferred indoor recreational activity is relaxing or watching TV. The most commonly preferred outdoor activities included hiking, camping, hunting, and gardening.¹⁶ A similar study has not been completed for hunters but it is possible the same preferences exist, particularly given the number of sportsmen who both hunt and fish.

¹¹ Southwick Associates and Responsive Management. 2011. Understanding Activities that Compete with Recreational Fishing. Prepared for the American Sport Fishing Association under a U.S. Fish and Wildlife Service Grant VA M-24-R.

¹² Southwick Associates. 2010. *A Portrait of Hunters and Hunting License Trends: National Report*. Prepared for the National Shooting Sports Foundation.

¹³ U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

¹⁴ American Sportfishing Association, Responsive Management, Oregon Department of Fish and Wildlife, and Southwick Associates. 2013. Exploring Recent Increases in Hunting and Fishing Participation. U.S. Fish & Wildlife Service Multi-state Conservation Grant F12AP00142.

¹⁵ Ibid.

¹⁶ Southwick Associates and Responsive Management. 2011. Understanding Activities that Compete with Recreational Fishing. Prepared for the American Sport Fishing Association under a U.S. Fish and Wildlife Service Grant VA M-24-R.

- Encouragingly, both sports have shown slight growth.¹⁷ And, analysis of license databases and lapse rates indicates that there are likely more people who identify themselves as hunters or anglers in any given year than there are licenses sold, often used as the measure of participation within a sport.
- Findings show that recruitment efforts to prompt new hunters or anglers interested in the sport to take up the sport should be partnered with retention efforts to prompt hunters and anglers taking a hiatus to return to the sport.¹⁸ Hunters and angler may be motivated to take a hiatus because others close to them prefer or have a commitment to other activities. Hunters and anglers might need reminding about the fun and relaxation that can be had with family and friends when hunting or fishing.

¹⁷ American Sportfishing Association, Responsive Management, Oregon Department of Fish and Wildlife, and Southwick Associates. 2013. Exploring Recent Increases in Hunting and Fishing Participation. U.S. Fish & Wildlife Service Multi-state Conservation Grant F12AP00142.

¹⁸ Ibid.

Index of Tables

Table 1-1. Number of licensed hunters and licenses sold in the nation, New England, and Maine from 2009 to 2013 ('000s)	9
Table 1-2. Number of licensed anglers and licenses sold in the nation, New England, and Maine from 2009 to 2013 ('000s)	10
Table 1-3. Average annual spending for hunters and anglers: 2001 – 2013 (constant \$2013)	11
Table 1-4. Estimated direct and total economic contribution of hunter and angler spending in Maine in 2013	11
Table 1-5. Target audience size for Maine licensed hunters and anglers.....	12
Table 1-6. Geographical distribution of the sampling frame for the survey of traveling sportsmen and women.	13
Table 1-7. Target audience size for traveling sportsmen panelists	13
Table 1-8. Demographic distribution of the target population among the traveling sportsmen sample versus respondents.....	14
Table 2-1. Maine’s Licensed Hunters: <i>Did you take any trips outside of your home state or province in the last 5 years where the primary reason for the trip was to go hunting (include all types of hunting)?</i>	17
Table 2-2. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>About how often do you hunt in locations outside of your home state or province?</i>	17
Table 2-3. Maine’s Licensed Anglers: <i>Did you take any trips outside of your home state or province in the last 5 years where the primary reason for the trip was to go fishing (include all types of fishing)?</i>	17
Table 2-4. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>About how often do you fish in locations outside of your home state or province?</i>	18
Table 2-5. Maine’s Licensed Hunters: <i>Have you visited any of the following locations in the last five years where the primary reason was to go hunting? (select all that apply)</i>	18
Table 2-6. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Not including your home state, did you hunt in any of the following locations in the last 5 years? (check all that apply)</i>	19
Table 2-7. Maine’s Licensed Anglers: <i>Have you visited any of the following locations in the last five years where the primary reason was to go fishing? (select all that apply)</i>	19
Table 2-8. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Not including your home state, did you fish in any of the following locations in the last 5 years? (check all that apply)</i>	20
Table 2-9. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Of the following locations, which one would you prefer to hunt in if you had the opportunity?</i>	21
Table 2-10. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Of the following locations, which one would you prefer to fish if you had the opportunity?</i>	21
Table 3-1. Maine’s Licensed Hunters: <i>How important are each of the following factors to you in choosing whether you hunt [selected species] in Maine?</i>	44

Table 3-2. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>How important are each of the following factors to you in choosing where you hunt outside of your home state or province?</i>	45
Table 3-3. Maine's Licensed Anglers: <i>How important are each of the following factors to you in choosing whether you go [open water fishing in freshwater / ice fishing] in Maine?</i>	46
Table 3-4. Traveling Anglers within Maine's market region who have not fished in Maine: <i>How important are each of the following factors to you in choosing where you fish outside of your home state or province?</i>	47
Table 3-5. Maine's Licensed Hunters: <i>How important are each of the following services to you in choosing whether you hunt [selected species] in Maine?</i>	48
Table 3-6. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>How important are each of the following services to you in choosing where you hunt outside of your home state or province?</i>	49
Table 3-7. Maine's Licensed Anglers: <i>How important are each of the following services to you in choosing to go open water fishing in freshwater in Maine?</i>	49
Table 3-8. Maine's Licensed Anglers: <i>How important are each of the following services to you in choosing to go ice fishing in Maine?</i>	50
Table 3-9. Traveling Anglers within Maine's market region who have not fished in Maine: <i>How important are each of the following services to you in choosing where you fish outside of your home state or province?</i>	50
Table 3-10. Maine's Licensed Hunters: <i>How important are each of the following site characteristics to you in choosing whether you hunt [selected species] in Maine?</i>	51
Table 3-11. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Finally, how important are the following site characteristics to you in choosing where to hunt outside your home state or province?</i>	52
Table 3-12. Maine's Licensed Anglers: <i>How important are each of the following site characteristics to you in choosing to go open water fishing in freshwater in Maine?</i>	52
Table 3-13. Maine's Licensed Anglers: <i>How important are each of the following site characteristics to you in choosing to go ice fishing in freshwater in Maine?</i>	53
Table 3-14. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Finally, how important are the following site characteristics to you in choosing where to fish outside of your home state or province?</i>	54
Table 4-1. Maine's Licensed Hunters: <i>Typically, what sources of information do you use when looking for information about places to visit for hunting? (select all that apply)</i>	56
Table 4-2. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Typically, what sources of information do you use when looking for information about places to visit for hunting? (check all that apply)</i>	56
Table 4-3. Maine's Licensed Anglers: <i>Typically, what sources of information do you use when looking for information about out-of-town places to fish? (select all that apply)</i>	57
Table 4-4. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Typically, what sources of information do you use when looking for information about places to visit for fishing? (check all that apply)</i>	57

Table 4-5. Maine’s Licensed Hunters: <i>Which websites do you visit? (select all that apply)</i>	58
Table 4-6. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Which websites do you visit? (check all that apply)</i>	59
Table 4-7. Top ten websites visited by hunters responding to Southwick Associates Media Monitor (SAMM) survey	59
Table 4-8. Top ten magazines read by hunters responding to Southwick Associates Media Monitor (SAMM) survey	59
Table 4-9. Top ten TV shows watched by hunters responding to Southwick Associates Media Monitor (SAMM) survey	60
Table 4-10. Top ten social media sites used by hunters responding to Southwick Associates Media Monitor (SAMM) survey	60
Table 4-11. Maine’s Licensed Anglers: <i>Which websites do you visit? (select all that apply)</i>	60
Table 4-12. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Which websites do you visit? (check all that apply)</i>	61
Table 4-13. Top ten websites visited by anglers responding to Southwick Associates Media Monitor (SAMM) survey	61
Table 4-14. Top ten magazines read by anglers responding to Southwick Associates Media Monitor (SAMM) survey	61
Table 4-15. Top ten TV shows watched by anglers responding to Southwick Associates Media Monitor (SAMM) survey	62
Table 4-16. Top ten social media sites used by anglers responding to Southwick Associates Media Monitor (SAMM) survey	62
Table 5-1. Maine’s Licensed Hunters: <i>Is hunting a leisure activity that you consider to be a vacation? (select one response)</i>	66
Table 5-2. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Which of the following represents the most important reasons why you hunt? (check all that apply)</i>	67
Table 5-3. Maine’s Licensed Anglers: <i>Is fishing a leisure activity that you consider to be a vacation? (select one response)</i>	67
Table 5-4. Traveling Anglers within Maine's Market Region who have not fished in Maine: <i>Which of the following represents the most important reasons why you fish? (check all that apply)</i>	68
Table 6-1. Maine’s licensed nonresident hunters by state of residence in 2013	70
Table 6-2. Maine’s licensed nonresident anglers by state of residence in 2013	71
Table 6-3. Fifteen states with the highest propensity of hunters to travel outside of their home state ..	73
Table 6-4. Fifteen states with the highest propensity of anglers to travel outside of their home state ...	74
Table 6-5. Top states within the Nation’s hunting sportsmen travel market.....	75
Table 6-6. Percent of the traveling hunter market captured by Maine.....	76
Table 6-7. Top states within the Nation’s fishing sportsmen travel market.....	76
Table 6-8. Percent of the traveling angler market captured by Maine	77
Table 7-1. Maine’s Licensed Hunters: <i>Hunting multi-day: Typically, did you hunt [selected species] by yourself or with other people?</i>	80

Table 7-2. Maine's Licensed Hunters: <i>Typically, who accompanied you on your multiple-day trip(s) [in/to] Maine in 2013 where the primary reason of the trip(s) was to hunt [selected species]?</i>	81
Table 7-3. Maine's Licensed Hunters: <i>Hunting one-day: Typically, did you hunt [selected species] by yourself or with other people? And, who accompanied you?</i>	81
Table 7-4. Maine's Licensed Hunters: <i>Typically, who accompanied you on your one-day [selected species] hunting trip(s) while you were [away from home / visiting Maine] for other reasons during 2013?</i>	81
Table 7-5. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Did you hunt alone or were you accompanied by other people?</i>	82
Table 7-6. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Who accompanied you on your most recent experience hunting outside of your home state or province? (check all that apply)</i>	82
Table 7-7. Maine's Licensed Anglers: <i>Fishing multi-day: Typically, did you fish [selected type] by yourself or with other people? And, who accompanied you?</i>	82
Table 7-8. Maine's Licensed Anglers: <i>Typically, did you go [open water fishing in freshwater / ice fishing] alone or were you accompanied by other people? And, who went fishing with you?</i>	83
Table 7-9. Maine's Licensed Anglers: <i>Typically, did you go [open water fishing in freshwater / ice fishing] by yourself or with other people on one-day trips?</i>	83
Table 7-10. Maine's Licensed Anglers: <i>Typically, who accompanied you on your one-day [open water/ice] fishing trip(s) while you were [visiting Maine/away from home] for other reasons during 2013?</i>	84
Table 7-11. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Did you fish alone or were you accompanied by other people?</i>	84
Table 7-12. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Who accompanied you on your most recent experience fishing outside of your home state or province? (check all that apply)</i>	84
Table 7-13. Maine's Licensed Hunters: <i>Did you take any trips [in/to] Maine during 2013 for the primary reason of hunting [selected species]?</i>	85
Table 7-14. Maine's Licensed Hunters: <i>When you hunted moose in Maine during 2013, were you</i>	85
Table 7-15. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>What did you hunt for on your most recent trip outside your home state or province? (check all that apply)</i>	86
Table 7-16. Traveling Anglers within Maine's market region who have not fished in Maine: <i>What type of fishing did you do on your most recent trip outside of your home state or province? (check all that apply)</i>	86
Table 7-17. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Did you fish for...? (select all that apply)</i>	87
Table 7-18. Maine's Licensed Hunters: <i>Considering all of your trips [in/to] Maine when the primary purpose was for hunting [selected species], what other activities did you participate in during your trip(s) in 2013?</i>	87

Table 7-19. Maine's Licensed Hunters: <i>On trips in 2013 when hunting was a secondary purpose, what was the primary reason for [your trips / visiting Maine]?</i>	88
Table 7-20. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>What other activities did you participate in on your most recent trip during which you went hunting outside of your home state or province? (check all that apply)</i>	88
Table 7-21. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>What was the primary [or secondary]* reason for your most recent trip during which you also went hunting outside of your home state or province?</i>	89
Table 7-22. Maine's Licensed Anglers: <i>On these trips in 2013 when fishing was a secondary purpose, what was the primary reason for [your trips / visiting Maine]?</i>	89
Table 7-23. Traveling Anglers within Maine's Market Region who have not fished in Maine: <i>What other activities did you participate in during your most recent trip during which you went fishing outside of your home state or province? (check all that apply)</i>	90
Table 7-24. Traveling Anglers within Maine's market region who have not fished in Maine: <i>What was the primary reason [or secondary reason]* for your most recent trip during which you also went fishing outside of your home state or province?</i>	90
Table 7-25. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Where did you go on your most recent trip?</i>	91
Table 7-26. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Where did you go on the most recent trip?</i>	92
Table 7-27. Maine's Licensed Hunters: <i>How far in advance of your trip do you start to make plans?</i>	92
Table 7-28. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>How far in advance of your trip did you start to make plans?</i>	93
Table 7-29. Maine's Licensed Anglers: <i>How far in advance of your trip do you start to make plans?</i>	93
Table 7-30. Traveling Anglers within Maine's market region who have not fished in Maine: <i>How far in advance of your trip did you start to make plans?</i>	93
Table 7-31. Maine's Licensed Hunters: <i>Trip duration</i>	94
Table 7-32. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Including travel time, how long was the trip?</i>	94
Table 7-33. Maine's Licensed Anglers: <i>Trip duration</i>	95
Table 7-34. Traveling Anglers within Maine's market region who have not fished in Maine: <i>Including travel time, how long was the trip?</i>	95
Table 7-35. Maine's Licensed Hunters: <i>Where did you stay? (check all that apply)</i>	96
Table 7-36. Maine's Licensed Hunters: <i>Hunting multi-day: How do you usually book your hotel/lodge/guide/travel?</i>	96
Table 7-37. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>Where did you stay? (check all that apply)</i>	97
Table 7-38. Traveling Hunters within Maine's market region who have not hunted in Maine: <i>How did you book your accommodations? (check all that apply)</i>	97
Table 7-39. Maine's Licensed Anglers: <i>Where did you stay? (check all that apply)</i>	98
Table 7-40. Maine's Licensed Anglers: <i>Fishing multi-day: How do you usually book your hotel/lodge/guide/travel?</i>	98

Table 7-41. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Where did you stay? (check all that apply)</i>	99
Table 7-42. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>How did you book your accommodations? (check all that apply)</i>	99
Table 8-1. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>How did you learn about the lodge? (check all that apply)</i>	100
Table 8-2. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>How did you learn about the lodge? (check all that apply)</i>	101
Table 8-3. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Did you stay in:</i>	101
Table 8-4. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Did you stay in:</i>	102
Table 8-5. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>For meals, did you...?</i>	102
Table 8-6. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>For meals, did you...?</i>	102
Table 8-7. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>What other services provided through the lodge did you use on your most recent trip?</i>	103
Table 8-8. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>What other services provided through the lodge did you use on your most recent trip?</i>	103
Table 8-9. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Please indicate which services you hired directly from someone other than a lodge (check all that apply)</i>	104
Table 8-10. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Please indicate which services you hired directly from someone other than a lodge (check all that apply)</i>	104
Table 8-11. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Did you hire a hunting guide on your most recent trip?</i>	107
Table 8-12. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Did you hire a fishing guide on your most recent trip?</i>	107
Table 8-13. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>How did you learn about your guide? (check all that apply)</i>	108
Table 8-14. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>How did you learn about your guide? (check all that apply)</i>	108
Table 8-15. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>How did you book your guide?</i>	109
Table 8-16. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>How did you book your guide?</i>	109
Table 9-1. Maine’s Licensed Hunters: <i>Overall, how satisfied were you with your typical [selected species] hunting experience in Maine during 2013?</i>	111
Table 9-2. Maine’s Licensed Anglers: <i>Overall, how satisfied were you with your typical [open water fishing in freshwater / ice fishing] experience in Maine during 2013?</i>	111

Table 9-3. Traveling Hunters within Maine’s market region who have not hunted in Maine: <i>Overall, how satisfied were you with your most recent experience hunting outside of your home state or province?</i>	112
Table 9-4. Traveling Anglers within Maine’s market region who have not fished in Maine: <i>Overall, how satisfied were you with your most recent experience fishing outside of your home state or province?</i>	112

Index of Figures

Figure 2-1. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Best hunting</i>	23
Figure 2-2. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Best prices</i>	24
Figure 2-3. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Safest regarding crime</i>	25
Figure 2-4. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Best transportation</i>	26
Figure 2-5. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Most fun outside of hunting</i>	27
Figure 2-6. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Best dining & entertainment</i>	28
Figure 2-7. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Best resorts, lodges, hotels</i>	29
Figure 2-8. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Most attractive natural setting</i>	30
Figure 2-9. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Most favorable climate</i>	31
Figure 2-10. Maine’s Licensed and Traveling Hunters: <i>Considering these hunting destinations — even if you have never hunted there before — please tell us which location you think has: Best reputation of guide services</i>	32
Figure 2-11. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Best fishing</i>	33
Figure 2-12. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Best prices</i>	34
Figure 2-13. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Safest regarding crime</i>	35

Figure 2-14. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Best transportation</i>	36
Figure 2-15. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Most fun outside of fishing</i>	37
Figure 2-16. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Best dining & entertainment</i>	38
Figure 2-17. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Best resorts, hotels, lodges, and motels</i>	39
Figure 2-18. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Most attractive natural setting</i>	40
Figure 2-19. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Most favorable climate</i>	41
Figure 2-20. Maine’s Licensed and Traveling Anglers: <i>Considering these fishing destinations — even if you have never fished there before — please tell us which location you think has: Best reputation of guide services</i>	42
Figure 5-1. Maine's Licensed Hunters: <i>As best as you can recall, when did you first hunt in Maine?</i>	64
Figure 5-2. Maine's Licensed Hunters: <i>About how often do you hunt in Maine?</i>	64
Figure 5-3. Maine's Licensed Anglers: <i>As best as you can recall, when did you first fish in Maine?</i>	65
Figure 5-4. Maine's Licensed Anglers: <i>About how often do you fish in Maine?</i>	65
Figure 6-1. Geographic distribution of Maine hunters who purchased a license between 2009 and 2013	70
Figure 6-2. Geographic distribution of Maine’s anglers who purchased a license between 2009 and 2013	71
Figure 6-3. Geographical distribution of the Nation’s traveling hunters in 2011 (Data source: U.S. Census Bureau Fishing, hunting, and wildlife-associated recreation survey).....	72
Figure 6-4. Geographical distribution of the Nation’s traveling anglers in 2011 (Data source: U.S. Census Bureau Fishing, hunting, and wildlife-associated recreation survey).....	73
Figure 6-5. Maine’s penetration rate into the traveling hunter market (ME hunter per 1,000 U.S. traveling hunters) in 2011	75
Figure 6-6. Maine’s penetration rate into the traveling angler market (ME angler per 1,000 U.S. traveling angler) in 2011	77
Figure 6-7. Maine hunter similarity index.....	79
Figure 6-8. Maine angler similarity index.....	79
Figure 8-1. Similarity Index to Maine hunters who stayed at a lodge	105
Figure 8-2. Similarity index to Maine anglers who stayed at a lodge	106
Figure 9-1. Maine’s Licensed Hunters: <i>How likely are you to hunt in Maine in the future?</i>	113

Figure 9-2. Maine’s Licensed Anglers: *How likely are you to fish on lakes, ponds, brooks, streams or rivers in Maine in the future?*..... 114

Figure 9-3. Maine’s Licensed Hunters: *How likely are you to recommend hunting in Maine to others? (select one response)* 115

Figure 9-4. Maine’s Licensed Anglers: *How likely are you to recommend fishing in Maine to others? (select one response)* 115