Maine Office of Tourism
Visitor Tracking Research
2017 Calendar Year Annual Report

Prepared by

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March 2018

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Research Objectives and Methodology

Methodology

- This report outlines results from calendar year 2017, with travel occurring between December 2016 and November 2017.

- Data collection occurred monthly between January 4 and December 13, 2017. The number of completed surveys collected for each research component are as follows:

Research Component	Completed Surveys
Overnight Visitor Survey	2,922
Day Visitor Survey	1,782
National Omnibus Survey	22,070

- *Statistical significance of differences between subgroups was calculated at the 95% confidence level and is noted throughout by <> or a/b/c/etc.*

- *A statistically significant increase from the previous year is indicated throughout by green text, and a significant decrease from the previous year is indicated by red text.*

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Research Objectives

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

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

Description of Survey Instruments

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

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

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

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2017 in Context

Maine experienced average temperatures through most of 2017, with temperatures slightly above average in January and during the early fall months. March and December were colder than usual.

Average Monthly Temperature – Maine 2017

Legend: 2017 Avg Temp (green bars), 20-year Avg Temp (red line)

Month	2017 Avg Temp	20-year Avg Temp
Jan	21.5	15.6
Feb	20.7	18.0
Mar	22.4	27.0
Apr	42.2	39.9
May	50.8	52.0
Jun	61.0	60.7
Jul	65.2	66.2
Aug	63.4	65.0
Sept	61.3	57.8
Oct	51.9	43.5
Nov	32.4	34.7
Dec	16.9	22.8

Data source: NOAA.gov

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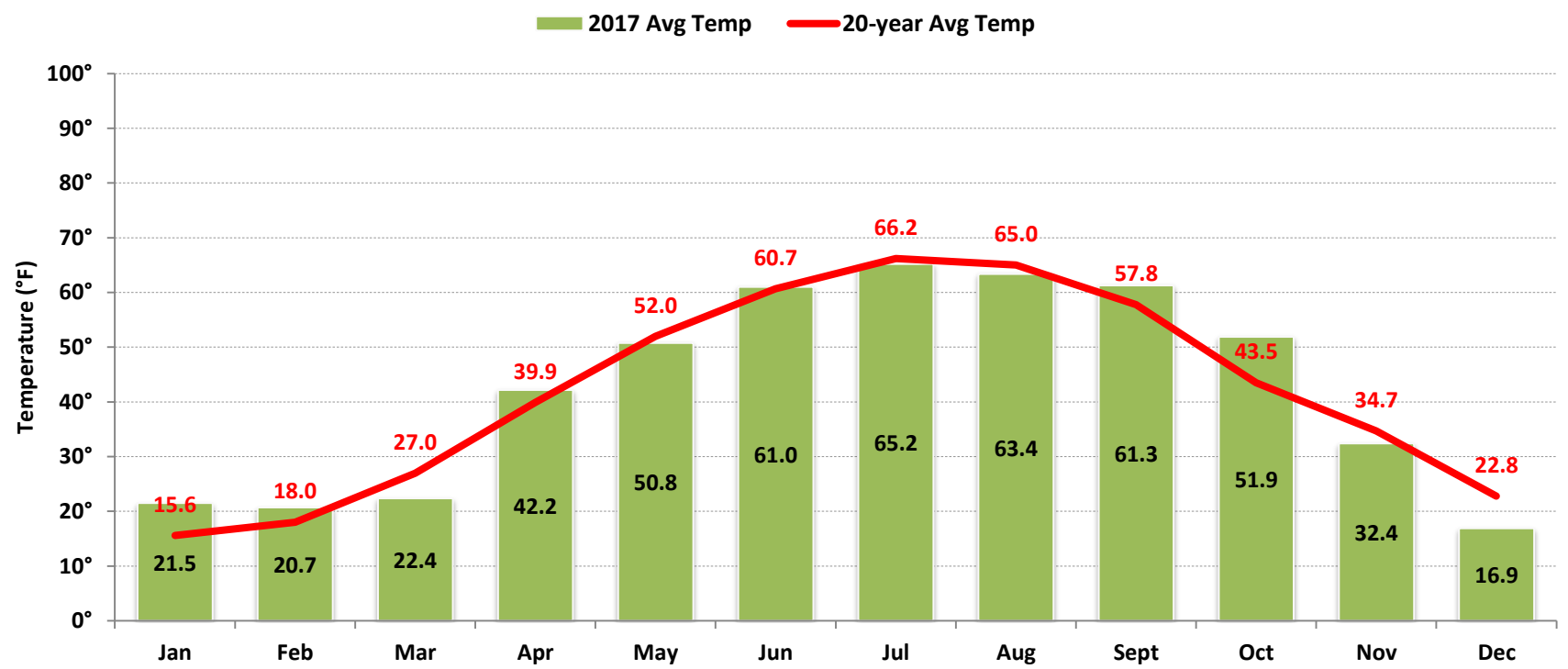
Precipitation in Maine varied from the 20-year average during most of 2017.

- 2017 brought higher than normal amounts of precipitation in January, February, April, May, and October, and lower than average amounts for the remaining months.

Monthly Precipitation – Maine 2017

■ 2017 Avg Precipitation ━━ 20-year Avg Precipitation

Data source: NOAA.gov

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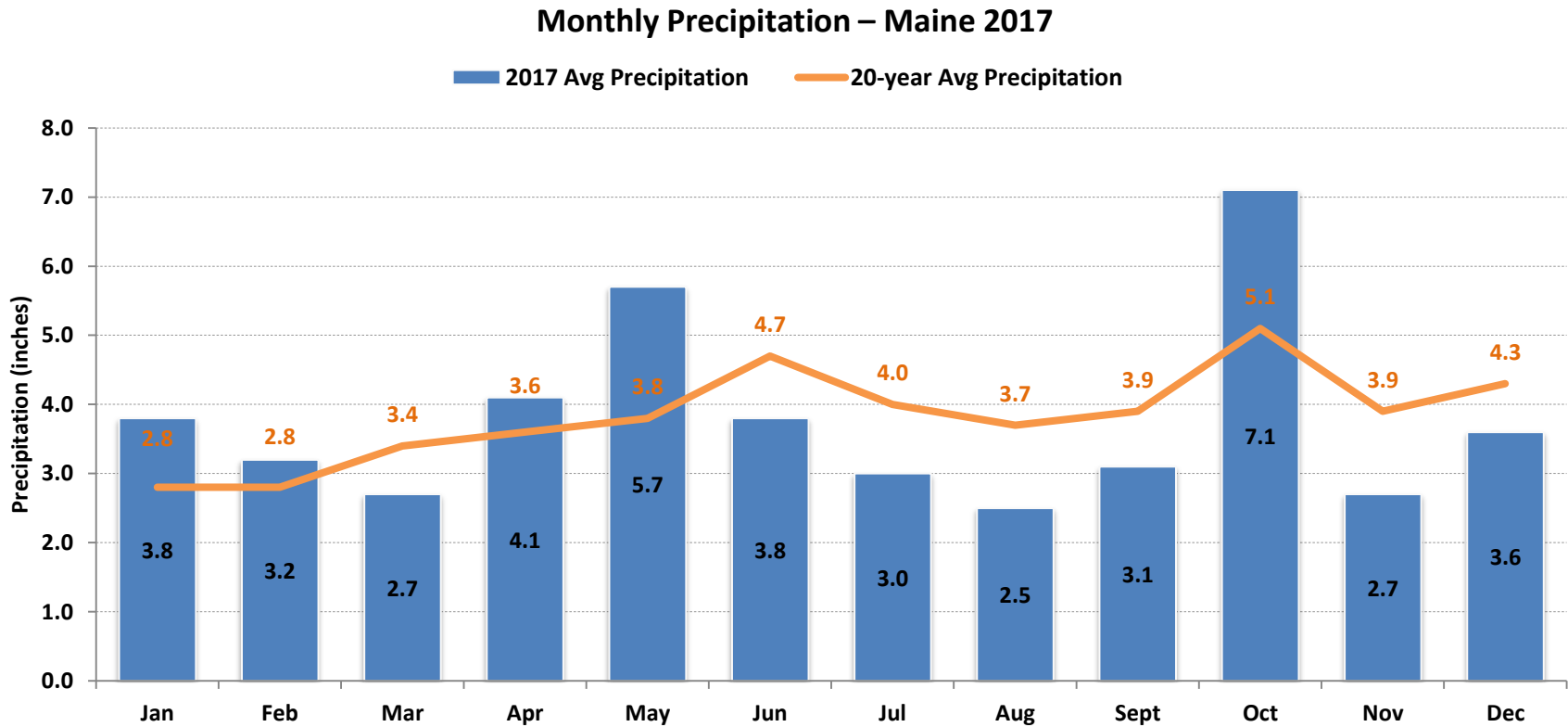
In 2017, the unemployment rate fell to its lowest level since 2000.

- The unemployment rate was lower in each month of 2017 than corresponding months the two years before.

**United States Unemployment Rate by Month
2015-2017**

2015 Average = 5.3
2016 Average = 4.9
2017 Average = 4.4

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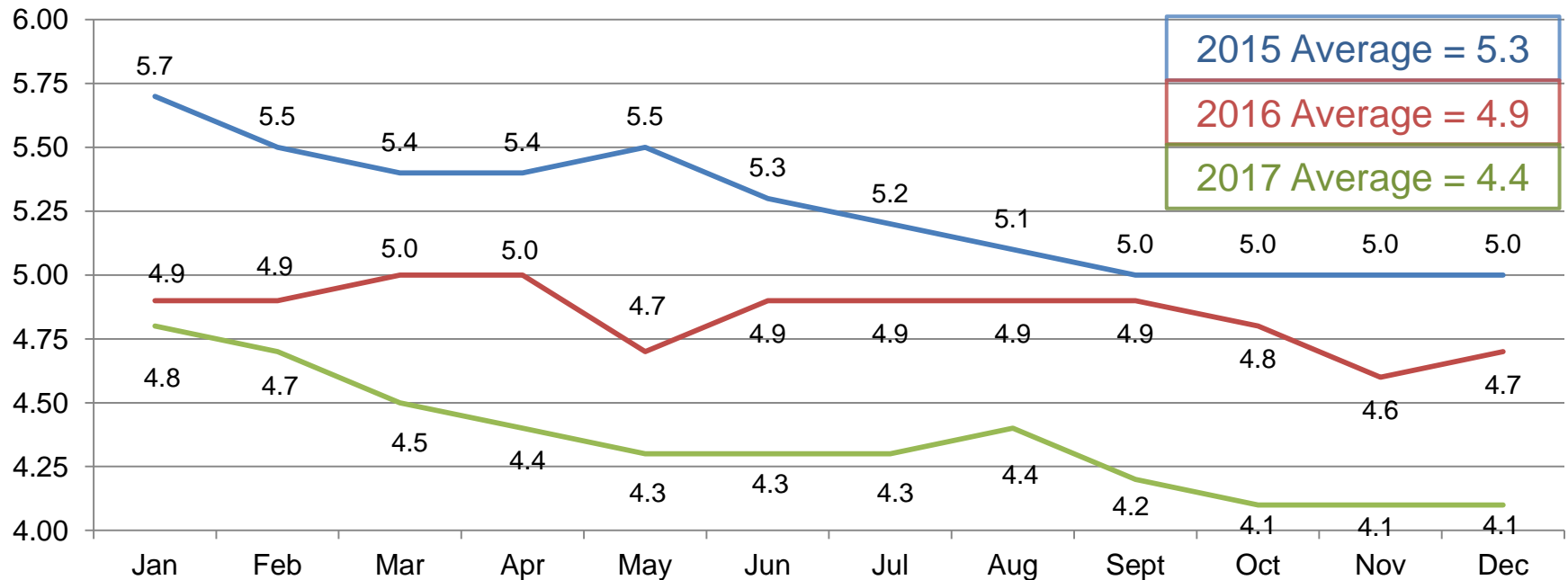
Gas prices rose significantly in early September of 2017, declining modestly in the remaining months of the year.

- Average gas prices nationwide in 2017 ($2.53) were higher than in 2016 ($2.25).

18 Month Average Retail Price Chart
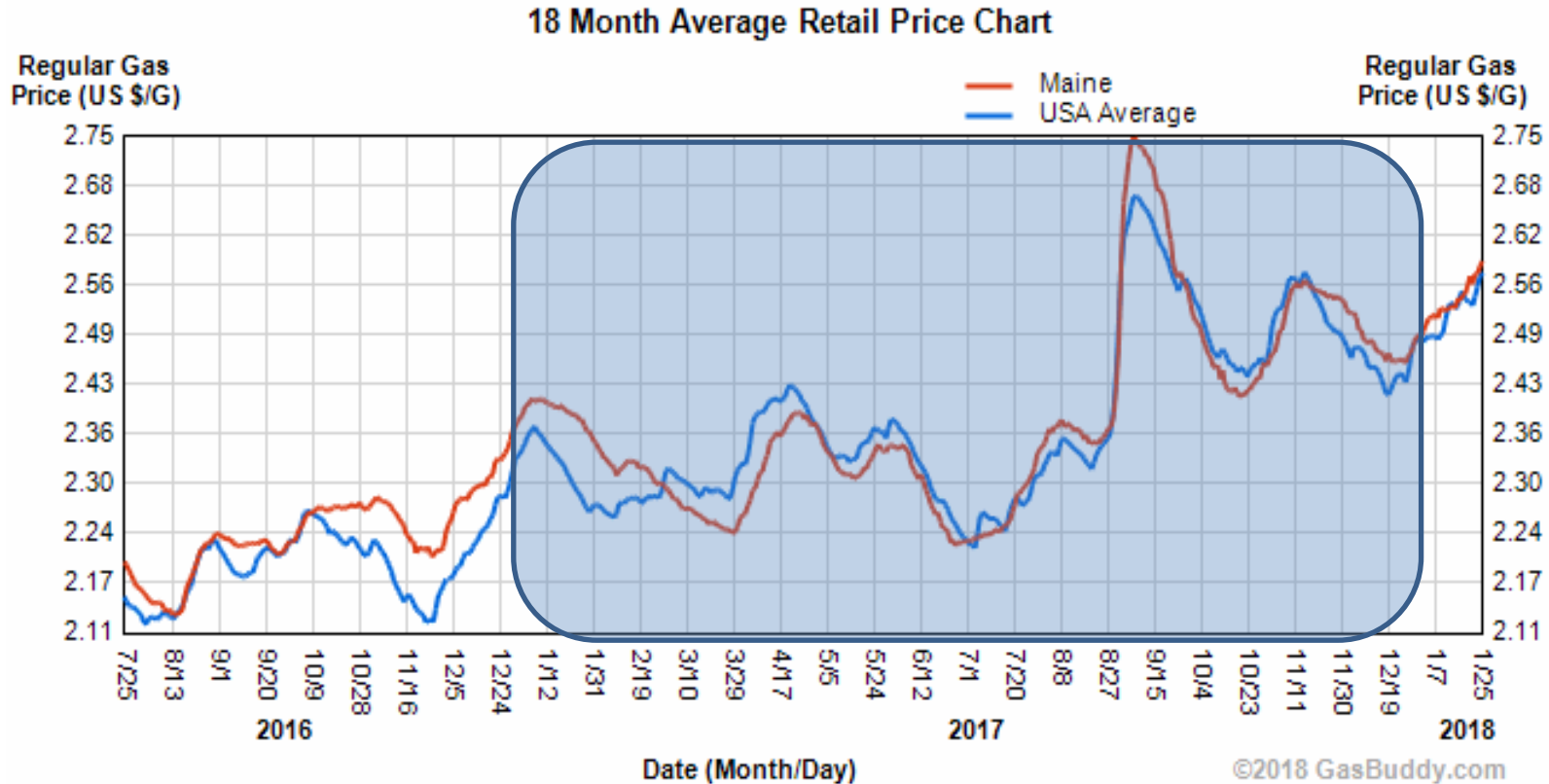
The Travel Price Index* remains higher than the Consumer Price Index, indicating a relatively high cost of travel.

- The 2017 Travel Price Index was higher than in 2015 and 2016, returning to the high index levels measured in 2014.
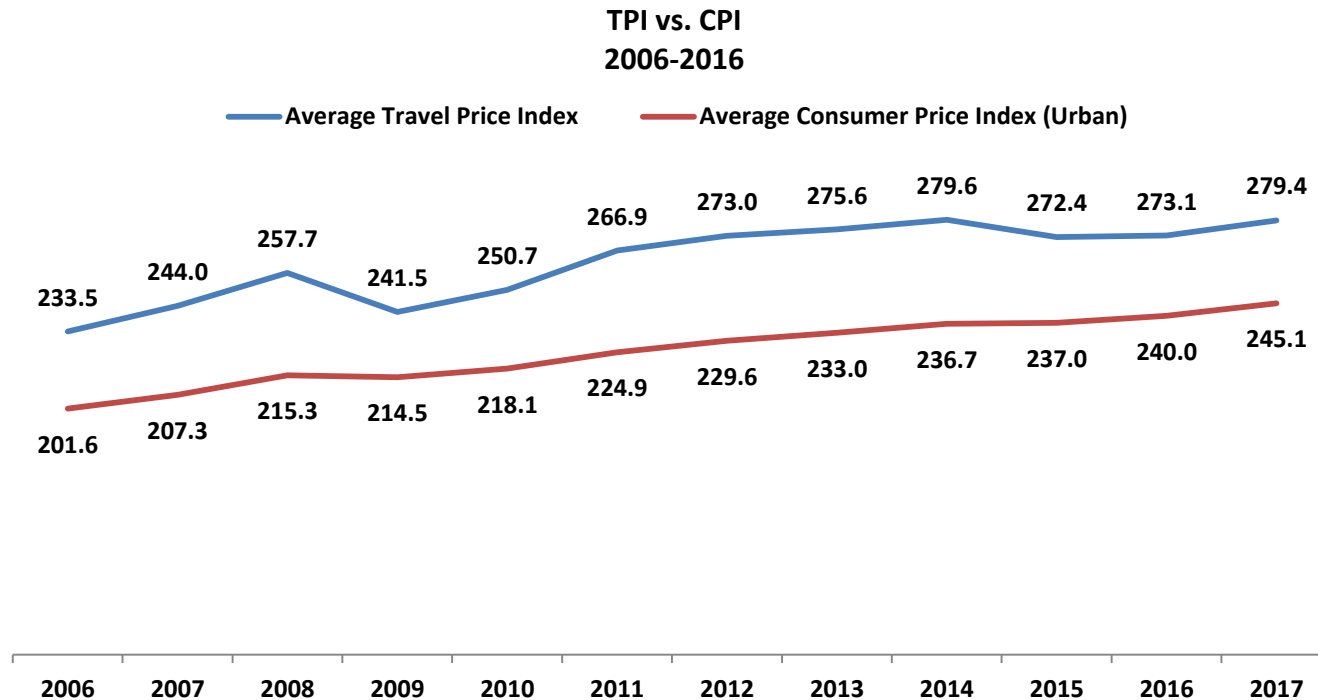
TPI vs. CPI
2006-2016

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

233.5   244.0   257.7   241.5   250.7   266.9   273.0   275.6   279.6   272.4   273.1   279.4

201.6   207.3   215.3   214.5   218.1   224.9   229.6   233.0   236.7   237.0   240.0   245.1

| 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |

Though it continues to be expensive to travel to the U.S. from Canada, 2017 showed a slight upswing in Canadians' purchasing power in the U.S., particularly in the summer and fall.

Canadian Exchange Rate

2015 Average
0.7832

2016 Average
0.7551

2017 Average
0.7710
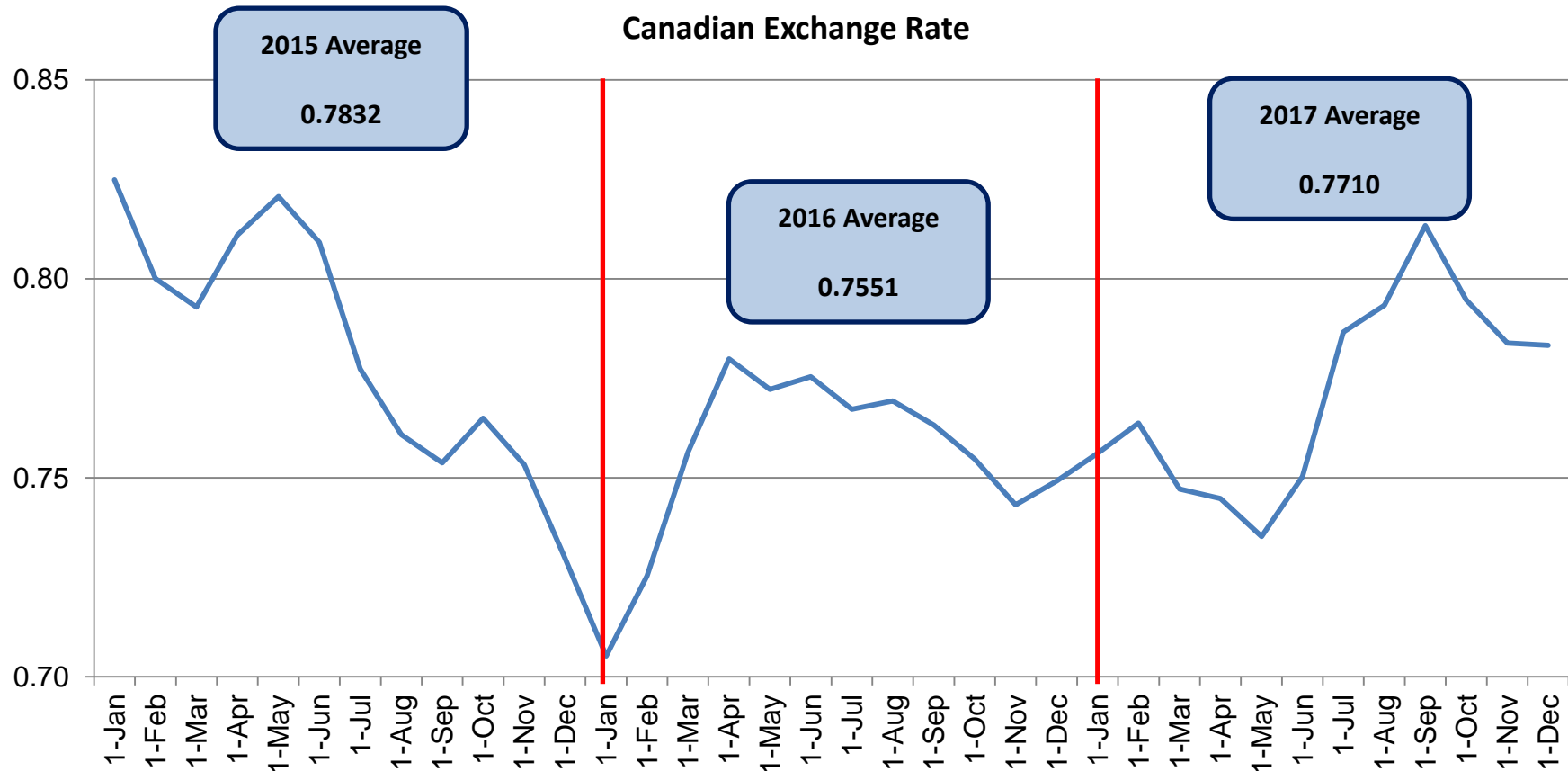
Baseline Visitor Statistics

More Americans took overnight leisure trips in 2017 than any year since 2008. Overnight business travel held steady at its recent highs.

Proportion of U.S. Residents Taking a Trip*

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

	2008 [n=17,655]	2009 [n=14,677]	2010 [n=17,785]	2011 [n=17,924]	2012 [n=17,722]	2013 [n=17,591]	2014 [n=17,675]	2015 [n=17,812]	2016 [n=21,910]	2017 [n=22,070]
Overnight VFR trip	52%	46%	47%	47%	44%	43%	41%	46%	51%	52%
Overnight leisure trip	37%	33%	35%	35%	32%	32%	32%	36%	43%	44%
Overnight business trip	19%	16%	17%	18%	16%	16%	15%	18%	23%	22%

Combining leisure and VFR travel results in a NET leisure/VFR travel figure of 62% for 2017 (as compared to 61% for 2016).

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

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Maine captures less than 1% of the national overnight leisure travel market.

Overnight Leisure Trips

State	2016	2017
Massachusetts	1.5%	1.1%
Connecticut	1.7%	1.7%
Maine	0.8%	0.5%
New Hampshire	0.5%	0.4%
Rhode Island	0.3%	0.2%
Vermont	0.2%	0.2%

■ 2016 [n=45,121]
■ 2017 [n=46,862]

Overnight Business Trips

State	2016	2017
Massachusetts	1.4%	1.3%
Connecticut	2.2%	2.0%
Maine	0.7%	0.4%
New Hampshire	0.2%	0.2%
Rhode Island	0.1%	0.2%
Vermont	0.2%	0.2%

■ 2016 [n=10,780]
■ 2017 [n=10,703]
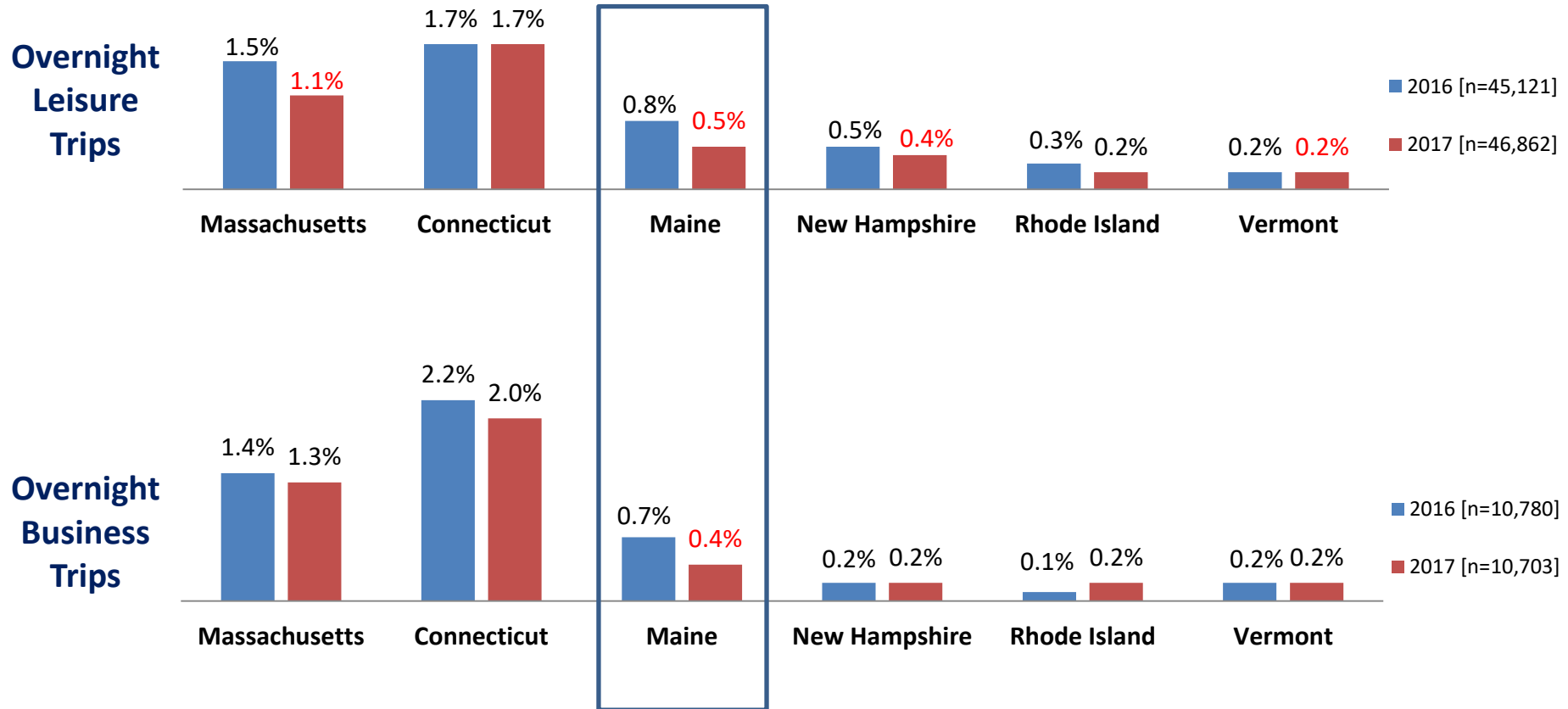
Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Maine's estimated overnight visitation* was up more than 7% over 2016, with the greatest percentage increase seen during the winter season.

Tourism-Related Overnight Visitation
(Number of Visitors)
[M=Million; K=Thousands]

	2016 Total	2017				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**18.86 M**	**20.25 M**	**11.03 M**	**8.00 M**	**1.22 M**	**7.4%**
Winter	3.09 M	3.49 M	1.93 M	1.34 M	220 K	13.1%
Summer	9.67 M	10.48 M	5.78 M	4.15 M	545 K	8.3%
Fall	6.10 M	6.28 M	3.31 M	2.51 M	453 K	2.9%
NET Trips	**6.59 M**	**6.81 M**	**3.63 M**	**2.62 M**	**566 K**	**3.5%**
Winter	1.10 M	1.25 M	670 K	461 K	115 K	13.7%
Summer	3.28 M	3.21 M	1.75 M	1.25 M	222 K	-2.1%
Fall	2.21 M	2.35 M	1.21 M	912 K	230 K	6.6%

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

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Maine's estimated day visitation* was up 3.5% over 2016, with the greatest year-over-year percentage increase also seen during the winter season.

Tourism-Related Day Visitation
(Number of Visitors)
[M=Million; K=Thousands]

	2016 Total	2017				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**22.31 M**	**23.09 M**	**14.14 M**	**8.09 M**	**859 K**	**3.5%**
Winter	2.53 M	2.92 M	1.77 M	1.01 M	137 K	15.5%
Summer	15.66 M	15.78 M	9.75 M	5.48 M	557 K	0.8%
Fall	4.13 M	4.39 M	2.62 M	1.60 M	165 K	6.3%
NET Trips	**8.26 M**	**8.55 M**	**5.33 M**	**2.83 M**	**388 K**	**3.5%**
Winter	948 K	1.13 M	676 K	385 K	68 K	19.1%
Summer	5.80 M	5.84 M	3.72 M	1.88 M	242 K	0.8%
Fall	1.52 M	1.58 M	936 K	568 K	78 K	4.3%

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

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During 2017, visitors spent more than $6 billion in Maine, nearly one-third of which was spent on *lodging*.

- *Lodging, food,* and *retail sales* continue to comprise the highest proportions of visitor spending.

Direct Tourism Expenditures
Tourism-Related Trips
($ Millions)

Direct Tourism Expenditures Tourism Related Trips*	Total 2016	Total 2017	Winter 2017	Summer 2017	Fall 2017	Y/Y % Difference
NET Spending	**$5,990**	**$6,010**	**$1,010**	**$3,150**	**$1,850**	**0.4%**
Lodging	$1,820	**$1,760**	$300	$920	$540	-3.2%
Restaurant/Food	$1,570	**$1,600**	$270	$840	$490	2.0%
Retail Sales	$1,530	**$1,520**	$260	$790	$470	-0.7%
Recreation	$570	**$620**	$100	$320	$190	8.5%
Gasoline	$460	**$470**	$80	$250	$150	3.0%
Transportation	$49	**$50**	$8	$30	$20	0.6%

*For the purposes of expenditure estimates, visitors are defined as <u>all overnight visitors and all out-of-state day visitors on tourism-related trips</u>. Tourism-related trips include:
- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

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Overnight Trip Planning

The Internet is the most widely used overnight trip planning resource, followed by the advice of family/friends.

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

Sources Used	2017 TOTAL (n=2,922)	Leisure (n=2,545) [a]	Business (n=377) [b]	Paid Accommodations (n=1,848) [c]	Unpaid Accommodations (n=1,074) [d]
The Internet	64%	64% b	57%	72% d	49%
Friends/relatives/co-workers' advice	45%	47% b	36%	39%	55% c
Social Media such as Facebook, Twitter, etc.	24%	25%	22%	24%	25%
Travel guides/brochures	14%	14%	15%	16% d	11%
AAA	13%	12%	18% a	15% d	10%
Travel planning apps	13%	12%	18% a	14% d	10%
Travel books	8%	7%	14% a	9%	7%
State tourism office	8%	7%	10%	9% d	6%
Travel magazines	7%	6%	10%	7%	6%
Local convention and visitors bureaus	6%	5%	11% a	6%	5%
Articles or travelogues	5%	5%	8%	6%	5%
Travel agent	5%	3%	17% a	5%	6%
Local Chambers of Commerce	4%	4%	8% a	5%	4%
Other	8%	8%	6%	7%	10% c
AVERAGE # OF SOURCES CONSULTED	*2.2*	*2.2*	*2.5 a*	*2.3 d*	*2.1*

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Several groups of travelers consult a greater number of sources when planning their overnight trip, as compared to their counterparts.

- **Balanced Achievers**: 2.6 sources (versus 2.2 for Genuine Originals & Social Sophisticates)

- **Travelers under the age of 35**: 2.4 sources (versus 2.2 for those 35 and older)

- **Americans residing outside New England**: 2.7 sources (versus 1.7 for Maine residents and 2.1 for New England residents)

- **Visitors traveling with children**: 2.5 sources (versus 2.1 for those traveling without children)

- **First-time visitors**: 2.8 sources (versus 2.1 for repeat visitors)

Q21. When you were planning this recent trip in Maine, which of the following sources did you use?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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The usage of various overnight trip planning resources has changed somewhat since 2008.

- Travelers' usage of *social media* for trip planning has risen dramatically over the last several years, while usage levels for most other planning resources have remained relatively stable.

Sources Used	2008 (n=3,320)	2009 (n=3,057)	2010 (n=2,992)	2011 (n=2,954)	2012 (n=2,497)	2013 (n=2,675)	2014 (n=2,930)	2015 (n=2,779)	2016 (n=2,909)	2017 (n=2,922)
The Internet	66%	66%	66%	65%	63%	64%	64%	65%	62%	64%
Friends/ relatives/ co-workers' advice	49%	43%	42%	42%	35%	34%	45%	44%	46%	45%
Social Media	n/a	n/a	n/a	n/a	8%	10%	18%	20%	24%	24%
Travel guides/ brochures	15%	16%	14%	15%	13%	12%	17%	20%	17%	14%
AAA	21%	20%	20%	20%	18%	16%	16%	18%	16%	13%
Travel planning apps	n/a	n/a	n/a	n/a	n/a	n/a	11%	14%	15%	13%
Travel magazines	n/a	9%	9%	8%	8%	9%	12%	13%	11%	7%
State tourism office	n/a	n/a	n/a	n/a	n/a	n/a	11%	12%	11%	8%
Travel Books	13%	11%	10%	10%	8%	9%	10%	11%	12%	8%
Articles or travelogues	n/a	8%	7%	7%	7%	7%	7%	8%	7%	5%
Contact local convention and visitors bureaus	4%	5%	5%	5%	5%	5%	6%	7%	7%	6%
Contact local Chambers of Commerce	4%	5%	4%	4%	0%	6%	5%	6%	4%	4%
Travel agent	5%	6%	6%	4%	0%	4%	5%	6%	7%	5%

Q21. When you were planning this recent trip in Maine, which of the following sources did you use?
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Despite decreases from 2016, VisitMaine.com and Maine Tourism Region websites remain among the top trip planning web sites used.

Websites Used (Base: Visitors Who Used the Internet When Planning their Trip to Maine)	2017 TOTAL (n=2,033)	Leisure (n=1,789) [a]	Business (n=244) [b]	Maine (n=266) [c]	New England (n=911) [d]	Mid-Atlantic (n=604) [e]
Any (NET)	94%	94%	94%	84%	95% c	96% c
TripAdvisor	36%	36%	37%	20%	36% c	39% c
VisitMaine.com	29%	30% b	21%	16%	30% c	35% c
Google maps	33%	32%	39%	26%	31%	37% c
Online search engines	33%	33%	27%	25%	33% c	35% c
Facebook	28%	28%	30%	32%	28%	30%
Maine Tourism Region Websites (NET)	25%	24%	30%	26%	24%	28%
Booking websites	22%	22%	21%	12%	22% c	25% c
Lodging/hotel/accommodation websites	18%	18%	17%	12%	22% ce	17%
Mainetourism.com	13%	13%	13%	8%	12%	15% c
Youtube	15%	13%	26% a	9%	11%	21% cd
Google+	12%	11%	25% a	9%	10%	16% cd
Travel blogs	8%	7%	14% a	1%	6% c	13% cd
Twitter	6%	5%	17% a	5%	4%	11% cd
DiscoverNewEngland.com	7%	7%	8%	2%	8% c	8% c
Airline websites	6%	4%	16% a	3%	2%	11% cd
Chambers of Commerce websites	4%	4%	8% a	1%	5% c	5% c
Zagat	4%	3%	10% a	1%	4%	7% cd
Convention and/or visitor bureau websites	4%	3%	12% a	2%	3%	5% c
LonelyPlanet	4%	3%	7%	1%	3% c	5% c
Tripit	3%	2%	6% a	<1%	2% c	6% cd
Fodors	3%	2%	5% a	1%	2%	4% cd
Frommers	2%	2%	5%	--	1%	4% d
Jetsetter	1%	1%	5% a	--	1%	3% d
Vimeo	2%	1%	9% a	<1%	2%	4% cd
igougo	1%	<1%	4% a	1%	--	2% c
Other Maine travel web sites	1%	1% b	<1%	1%	1%	2%
Other	4%	4% b	<1%	2%	5% c	3%

Q22. Which of the following web sites did you visit when planning this trip in Maine?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- *Airbnb* is the most utilized shared network for lodging, while *Uber* is the most popular transportation network.

- Business travelers are much more likely than leisure travelers to have used a shared network for their lodging or transportation. Likewise, first-time visitors are more likely than repeat visitors to have used a shared network for lodging or transportation.

Used Peer-to-Peer Network
2017
(n=2922)

- ■ Yes
- ■ No

55%   45%
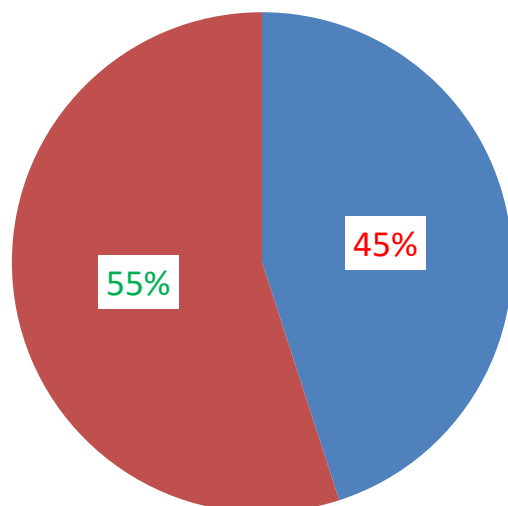
Peer-to-Peer Networks Used	2017 TOTAL (n=2922)	Leisure (n=2545) [a]	Business (n=377) [b]	First-Time Visitor (n=598) [c]	Repeat Visitor (n=2324) [d]
Any (NET)	45%	42%	**66% a**	64% d	41%
Lodging (NET)	41%	39%	**57% a**	58% d	37%
Airbnb	16%	15%	26% a	30% d	13%
VRBO (Vacation Rentals by Owner)	7%	7%	9%	12% d	6%
One Fine Stay	4%	3%	12% a	10% d	3%
Flipkey	3%	2%	10% a	8% d	2%
Other lodging	15%	15% b	11%	9%	16% c
Transportation (NET)	38%	34%	61% a	56% d	33%
Uber	17%	14%	38% a	34% d	13%
Lyft	6%	5%	14% a	12% d	4%
Sidecar	3%	2%	8% a	8% e	2%
Other transportation	16%	17% b	11%	13%	17% c

Q23. For this specific trip in Maine, which (if any) of the following peer-to-peer or shared networks did you use to book your lodging (AirBnB, VRBO, etc.) or transportation (Uber, Lyft, etc.)? Please check all that apply.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Certain groups of travelers are more apt to use shared networks, as compared to their counterparts.

- Younger visitors, those from Mid-Atlantic states, and visitors categorized as *Balanced Achievers* are all more likely to utilize shared networks to book their lodging or transportation.

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

Peer-to-Peer Networks Used	2017 TOTAL (n=2922)	Residence				Age		Visitor Segment		
		Maine (n=420) [a]	New England (n=1337) [b]	Mid-Atlantic (n=818) [c]	Canada (n=346) [d]	<45 yrs (n=1814) [e]	45+ yrs (n=1108) [f]	Balanced Achievers (n=1000) [g]	Genuine Originals (n=947) [h]	Social Sophisticates (n=258) [i]
Any (NET)	**45%**	**34%**	**42% a**	**56% abd**	**46% a**	**51% f**	**35%**	**58% hi**	**37%**	**37%**
Lodging (NET)	**41%**	**32%**	**38% a**	**50% abd**	**42% a**	**46% f**	**33%**	**53% hi**	**34%**	**32%**
Airbnb	16%	8%	14% a	21% ab	23% ab	23% f	6%	25% hi	11%	8%
VRBO (Vacation Rentals by Owner)	7%	4%	7%	10% abd	5%	8% f	5%	10% h	5%	6%
One Fine Stay	4%	3%	2%	8% ab	7% ab	6% f	2%	8% hi	1%	1%
Flipkey	3%	1%	1%	6% abd	3% b	4% f	2%	5% hi	<1%	<1%
Other Lodging	15%	17% d	17% cd	13% d	8%	12%	20% e	14%	19% g	18%
Transportation (NET)	**38%**	**30%**	**33%**	**49% abd**	**38% a**	**43% f**	**29%**	**49% hi**	**29%**	**30%**
Uber	17%	9%	12%	27% ab	23% ab	24% f	7%	28% hi	9%	8%
Lyft	6%	2%	4%	11% abd	5% a	8% f	2%	11% hi	1%	1%
Sidecar	3%	2%	1%	6% ab	5% ab	4% f	1%	5% hi	1%	1%
Other Transportation	16%	19% d	18% cd	14% d	8%	13%	20% e	14%	19% g	22% g

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

- Of the 23% who <u>did</u> consider other destinations, the most frequently considered destinations included other New England states and New York.

Other Destinations Considered	2017 (n=2922)
Didn't consider other destinations	74%
Any (NET)	23%
New Hampshire	6%
Vermont	5%
Massachusetts	2%
New York	2%
Florida	1%
Rhode Island	1%
Connecticut	1%
California	1%
Nova Scotia	1%

Several groups of travelers are more likely than their counterparts to **have considered other destinations**.

Mid-Atlantic (n=818)	Maine, New England (n=1757)
<27%>	20%

First-Time Visitors (n=598)	Repeat Visitors (n=2324)
<32%>	20%

Paid Accommodations (n=1848)	Unpaid Accommodations (n=1074)
<25%>	18%

Kids on Trip (n=936)	No Kids (n=1986)
<27%>	21%

<45 yrs (n=1814)	45+ yrs (n=1108)
<25%>	19%

Q16. What other states or provinces, if any, did you consider for this specific trip?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Three-fourths of overnight travelers continue to research Maine after arriving for their trip, particularly business travelers.

- Three in five travelers report using a mobile device (smartphone or tablet) to continue researching places to go or things to do in Maine while visiting.

Trip Research While in Maine

Any (NET)
- 76%
- 75%
- 83% a

A mobile device (such as a smartphone or tablet)
- 60%
- 60%
- 58%

A laptop
- 31%
- 28%
- 53% a

Materials from my hotel, campground, etc.
- 22%
- 21%
- 23%

Legend:
- 2017 TOTAL (n=2922)
- Leisure (n=2545) [a]
- Business (n=377) [b]

Several groups of travelers are more likely than their counterparts to continue researching Maine while visiting the State.

First-Time Visitor (n=598)	Repeat Visitor (n=2324)
<86%>	74%
Paid Accommodations (n=1848)	**Unpaid Accommodations (n=1074)**
<80%>	70%
Kids on Trip (n=936)	**No Kids (n=1986)**
<81%>	74%
<45 yrs (n=1814)	**45+ yrs (n=1108)**
<82%>	66%

Q33. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Following four consecutive years of increases, the proportion of visitors continuing to research Maine while on their trip decreased in 2017.

- The proportion using a mobile device to conduct research about Maine held steady, though.

Percent Researching Maine During Visit
2009 - 2017

Legend: Any Research, Mobile Device

Any Research values: 56% (2009), 59% (2010), 60% (2011), 62% (2012), 65% (2013), 74% (2014), 76% (2015), 80% (2016), 76% (2017)

Mobile Device values: 15% (2009), 22% (2010), 25% (2011), 26% (2012), 32% (2013), 53% (2014), 54% (2015), 60% (2016), 60% (2017)
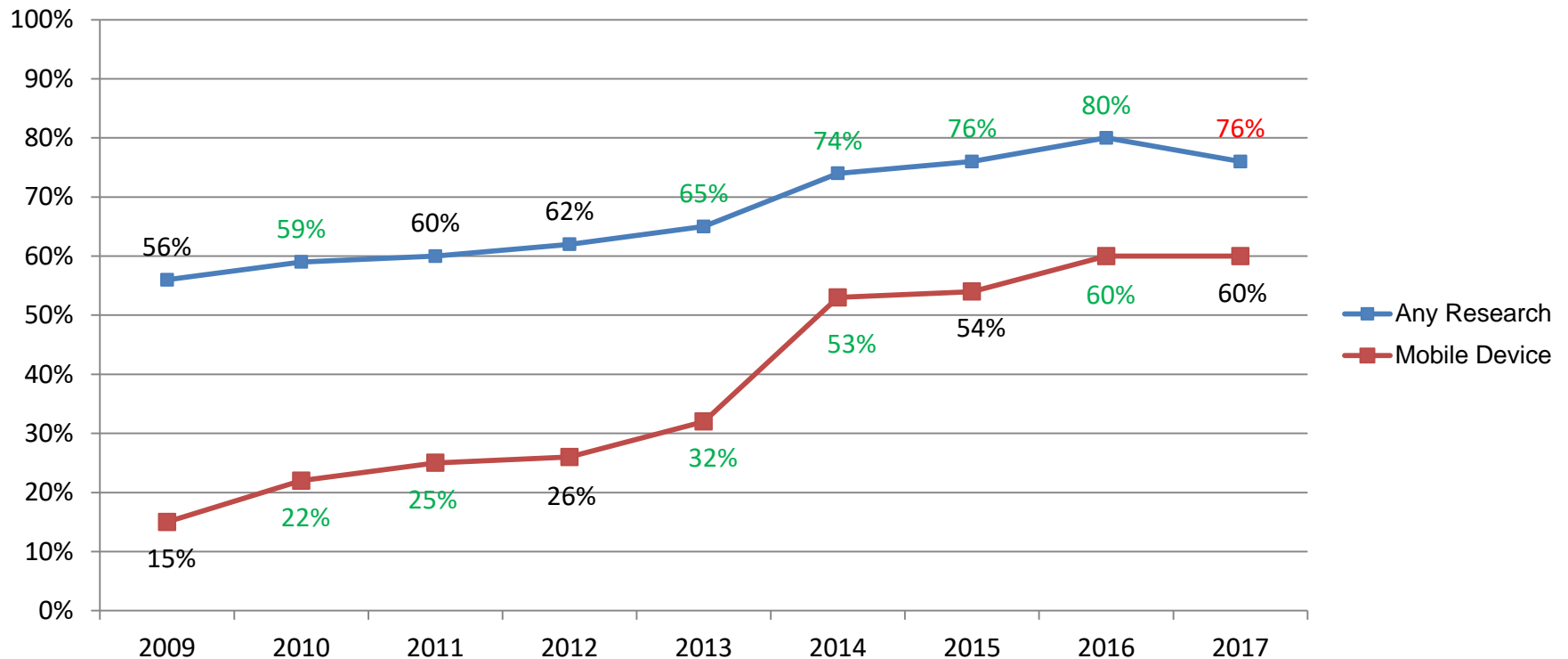
Q30. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight Visitor Travel Logistics

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

- Not surprisingly, leisure travelers are more likely to be traveling with kids than are business travelers.
- American visitors are more likely to be traveling with kids than are Canadian visitors.

Travel Party Size and Composition

■ Percent Traveling with Children 2016 ■ Percent Traveling with Children 2017

Average Number of People in Party 2016   Average Number of People in Party 2017

(n=2909)   **(n=2922)**

	TOTAL	Leisure [a]	Business [b]	Americans [c]	Canadians [d]
Avg # 2016	2.9	2.9	2.8	2.9	2.7
Avg # 2017	3.0	3.1 b	2.6	3.1 d	2.5
% w/ children 2016	33%	35%	21%	34%	24%
% w/ children 2017	32%	34% b	19%	33% d	25%

Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
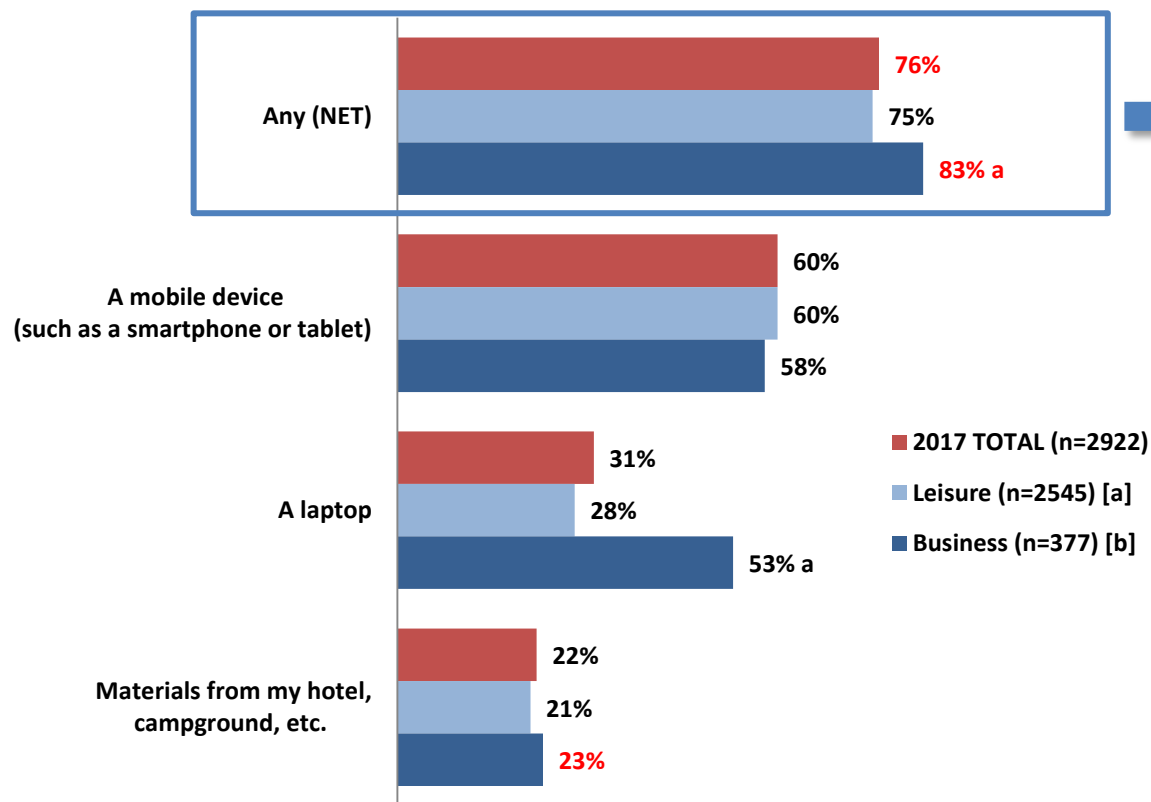Q25. How many of these people were: Children?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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The proportion of overnight visitors traveling with children in 2017 and the average travel party size is consistent with the last three years.

Travel Party Size and Composition

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

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Average Number of People in Travel Party	2.7	2.7	2.6	2.7	2.7	2.7	2.9	2.9	2.9	3.0
Percent Traveling with Children	26%	26%	21%	22%	22%	25%	32%	31%	33%	32%
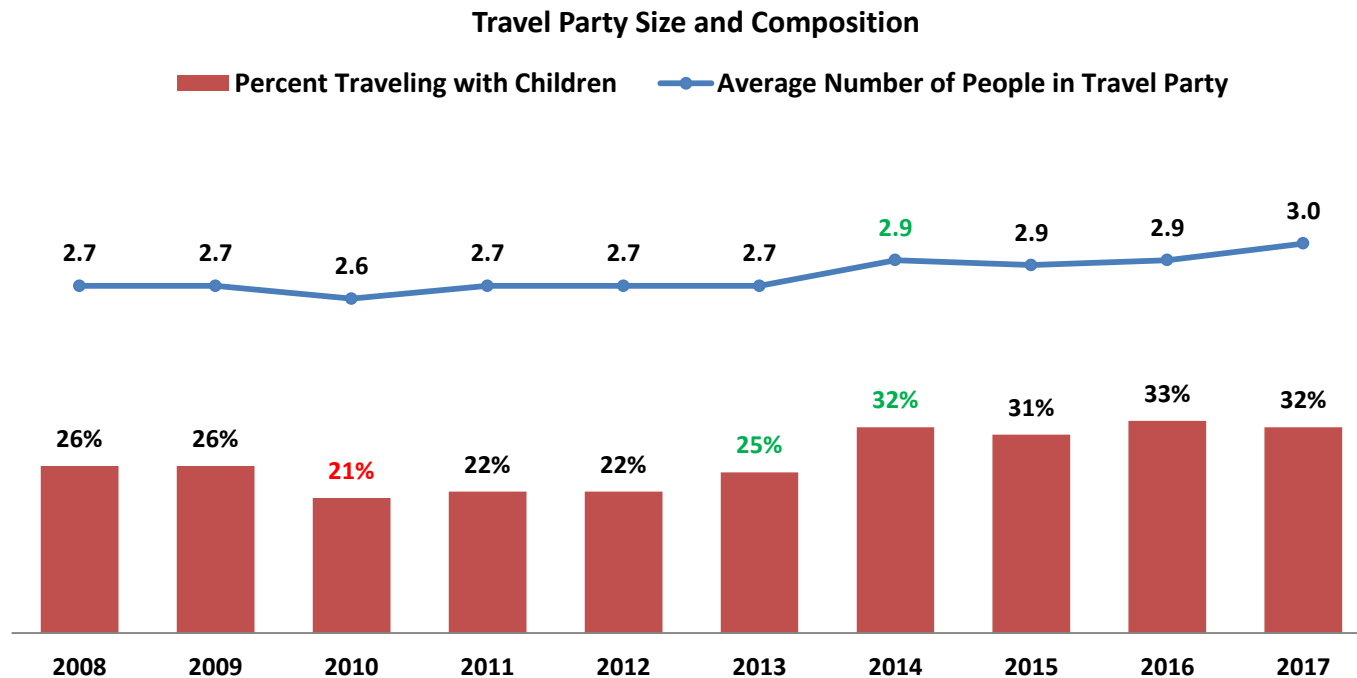
Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q22. How many of these people were: Children?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Three in four overnight visitors use their personal car to travel to Maine.

- Leisure travelers and repeat visitors are more likely to be using their personal car to travel to Maine, while business travelers and first-time visitors are more likely to be arriving in a rental car or flying to Maine.

Transportation Method

Method		
Personal car	73%	77% b / 45%
Airplane	10%	8% / 20% a
Rental car	8%	7% / 17% a
Train	2%	1% / 3%
Peer-to-Peer/ Shared	2%	1% / 5% a
Other (NET)	6%	6% / 9%

■ 2017 TOTAL (n=2922)
■ Leisure (n=2545) a
■ Business (n=377) b

Transportation Method
First-Time vs. Repeat Visitors

Method	First-Time	Repeat
Personal car	47%	<80%>
Airplane	<24%>	6%
Rental Car	<15%>	6%
Peer-to-Peer/ Shared	<3%>	1%
Other (NET)	11%	7%

■ First-Time Vistor (n=598)
■ Repeat Visitor (n=2324)

Q26. Which of the following types of transportation did you use to travel the most miles from your home to get to your Maine destination?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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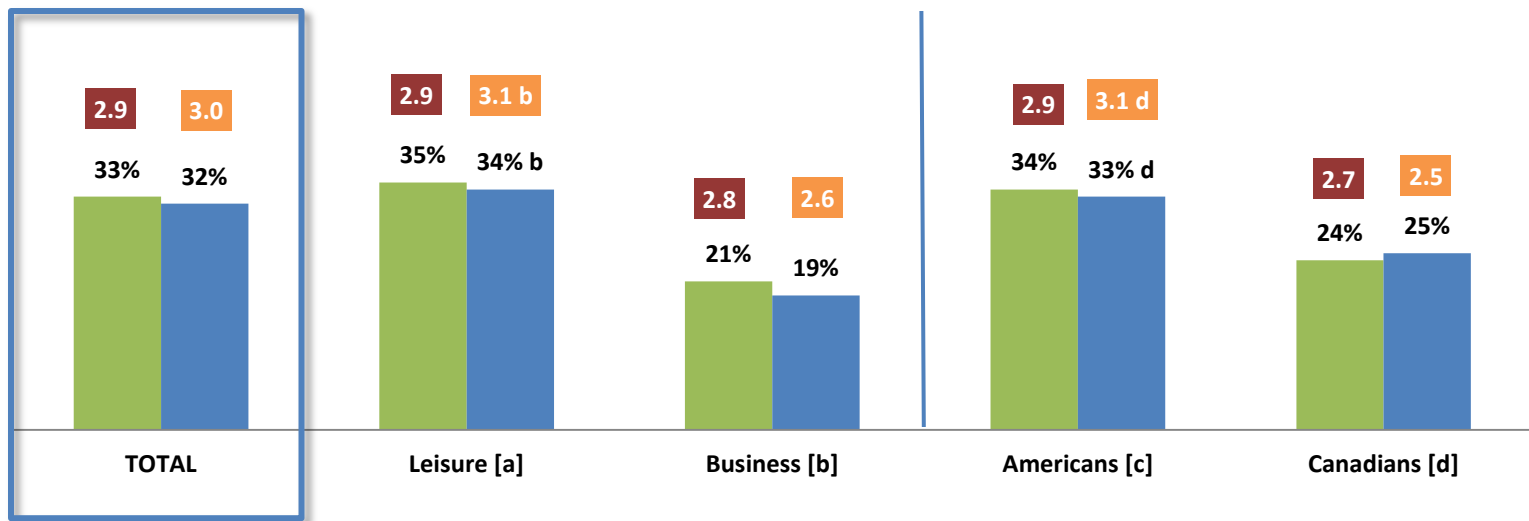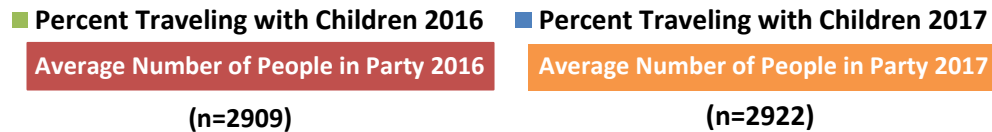providing direction
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Hotels/motels/resorts are the principal lodging choice for Maine's overnight visitors.

- 2017 saw an <u>increase</u> in the proportion of overnight visitors staying in a *cabin/cottage/vacation home*, and a <u>decrease</u> in the proportion staying in a *hotel/motel/resort* or *inn/bed & breakfast*.

Paid Accommodations

Paid (NET)	63%
Hotel, motel, or resort	**43%**
Inn or Bed & Breakfast	**7%**
Cabin, cottage, condo, or vacation home that you rented	**8%**
RV park/tent campground	3%
Sporting camp or wilderness lodge	<1%

■ 2017 TOTAL (n=2922)

Unpaid Accommodations

Unpaid (NET)	37%
Home, cabin, cottage, or condo of a friend, relative, or associate	25%
Your own second home, cabin, cottage, or condo	**5%**
Camping in a wilderness area	2%
At a free campground	2%

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Various groups of travelers are more likely to stay in paid accommodations while visiting Maine.

- Overnight visitors who are more likely to stay in <u>paid</u> accommodations when visiting Maine include: first-time visitors, business travelers, Canadian visitors, and travelers with household incomes of $75,000 or more.

Proportion of Visitors Staying in Paid Accommodations

First-Time/Repeat Visitor	Trip Type	Residence	Household Income

2017 TOTAL (n=2922)	First-Time Visitor (n=598) a	Repeat VIsitor (n=2324) b	Business (n=377) c	Leisure (n=2545) d	Americans (n=2576) e	Canadians (n=346) f	<$75k (n=1297) g	$75k + (n=1624) h
63%	69% a	62%	74% d	62%	62%	75% e	57%	68% g
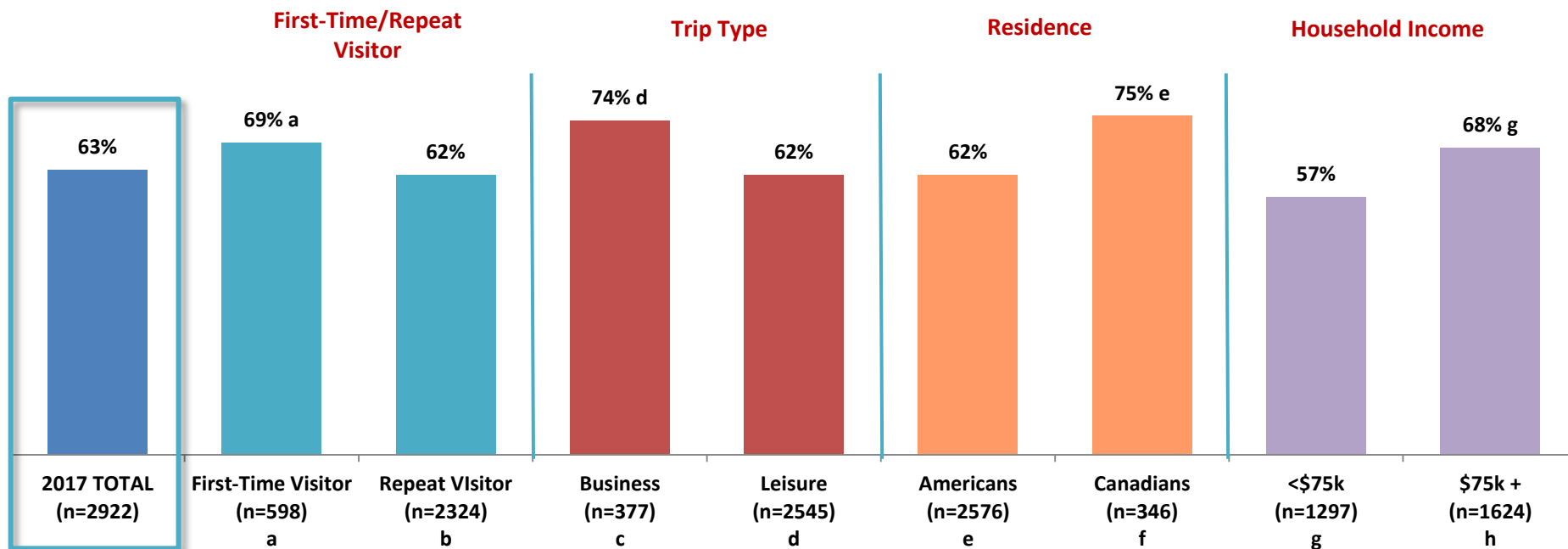
Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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On average, overnight visitors are staying in Maine for three nights.

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

Average Nights Away from Home

Kids on Trip **First-Time/Repeat Visitor** **Residence**

	Value
2017 TOTAL (n=2922)	3.3
Kids (n=936) a	3.7 b
No Kids (n=1986) b	3.1
First-Time Visitor (n=598) c	3.8 d
Repeat VIsitor (n=2324) d	3.1
Maine (n=420) h	2.4
New England (n=1337) i	2.8 h
Mid-Atlantic (n=818) j	4.2 hi
Canada (n=346) k	3.9 hi

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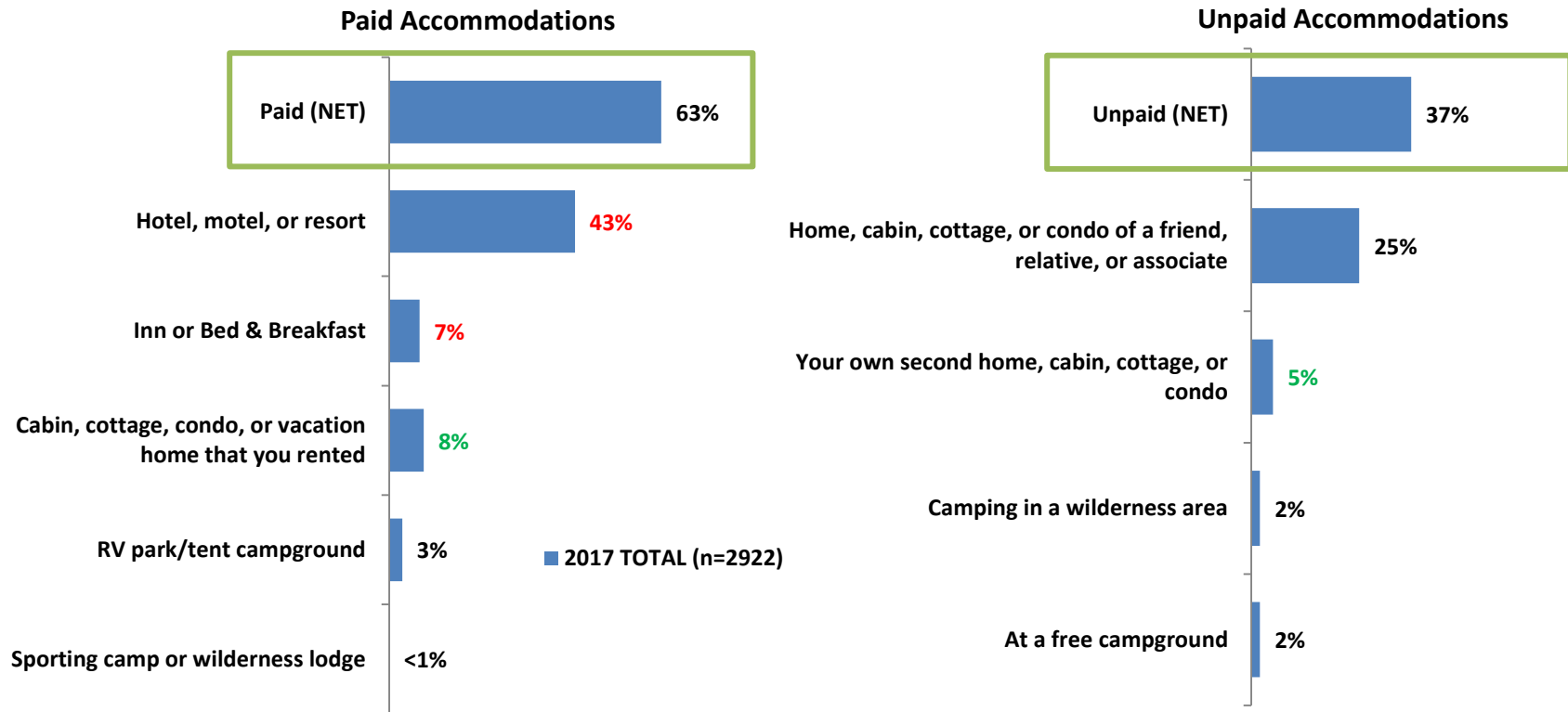 <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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One-fifth of Maine's overnight visitors in 2017 were visiting the State for the first time.

- Business travelers are more likely than leisure travelers to be visiting Maine for the first time.
- While Canadians remain more likely than American travelers to be visiting Maine for the first time, Canadians in 2017 are even *more* likely to be visiting Maine for the first time than were Canadians in 2016 (42% versus 34%).

Repeat vs. First-Time Visitors

	2017 TOTAL (n=2922)	Leisure (n=2545) a	Business (n=377) b	Americans (n=2576) c	Canadians (n=346) d
Repeat Visitor	80%	81% b	70%	82% d	58%
First-Time Visitor	20%	19%	30% a	18%	42% c

Legend: ■ Repeat Visitor ■ First-Time Visitor

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

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Several groups of travelers are more likely than their counterparts to be visiting Maine for the first time.

- Travelers more likely to be first-time visitors to Maine include those who are:
    - Under the age of 45;
    - Staying in paid accommodations;
    - Arriving from outside New England;
    - Categorized as Balanced Achievers; and
    - Visiting during the winter season.

< 45 yrs (n=1814)	45+ yrs (n=1108)
<25%>	12%
Paid Accomm. (n=1848)	**Unpaid Accomm.** (n=1074)
<22%>	17%
Mid-Atlantic (n=818)	**Maine, New England** (n=1757)
<41%>	7%

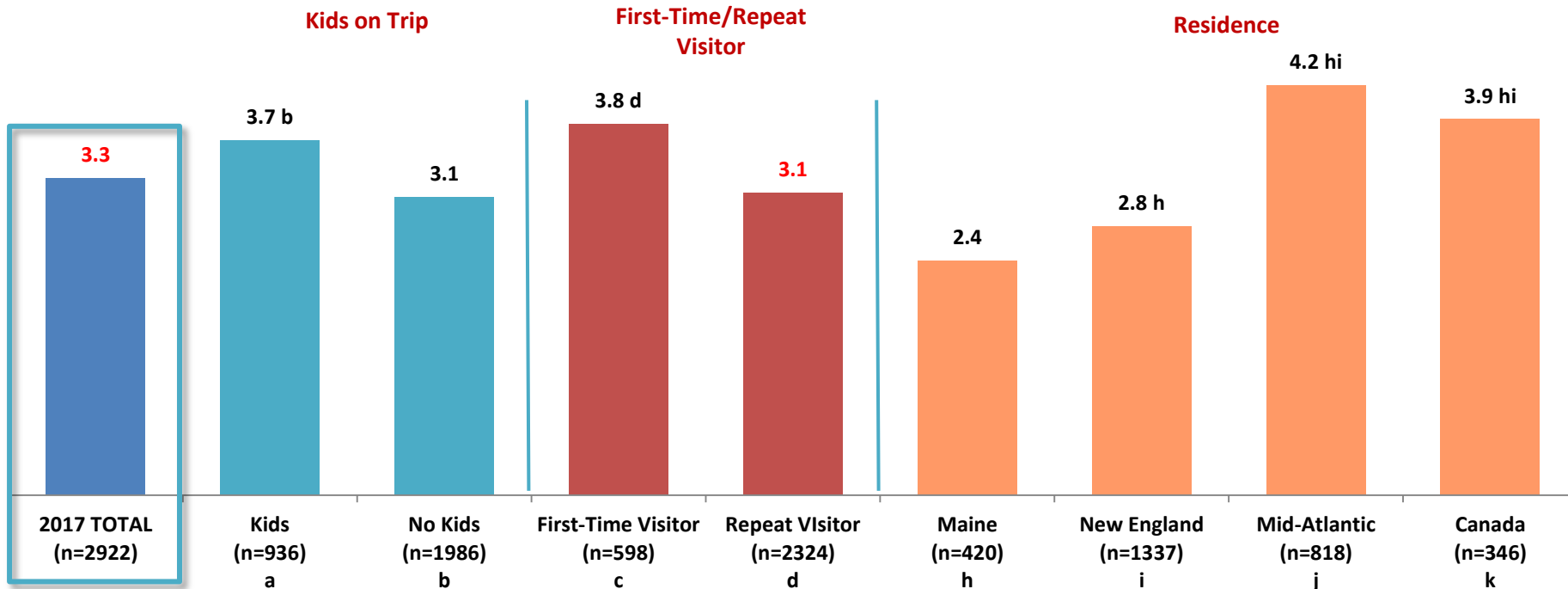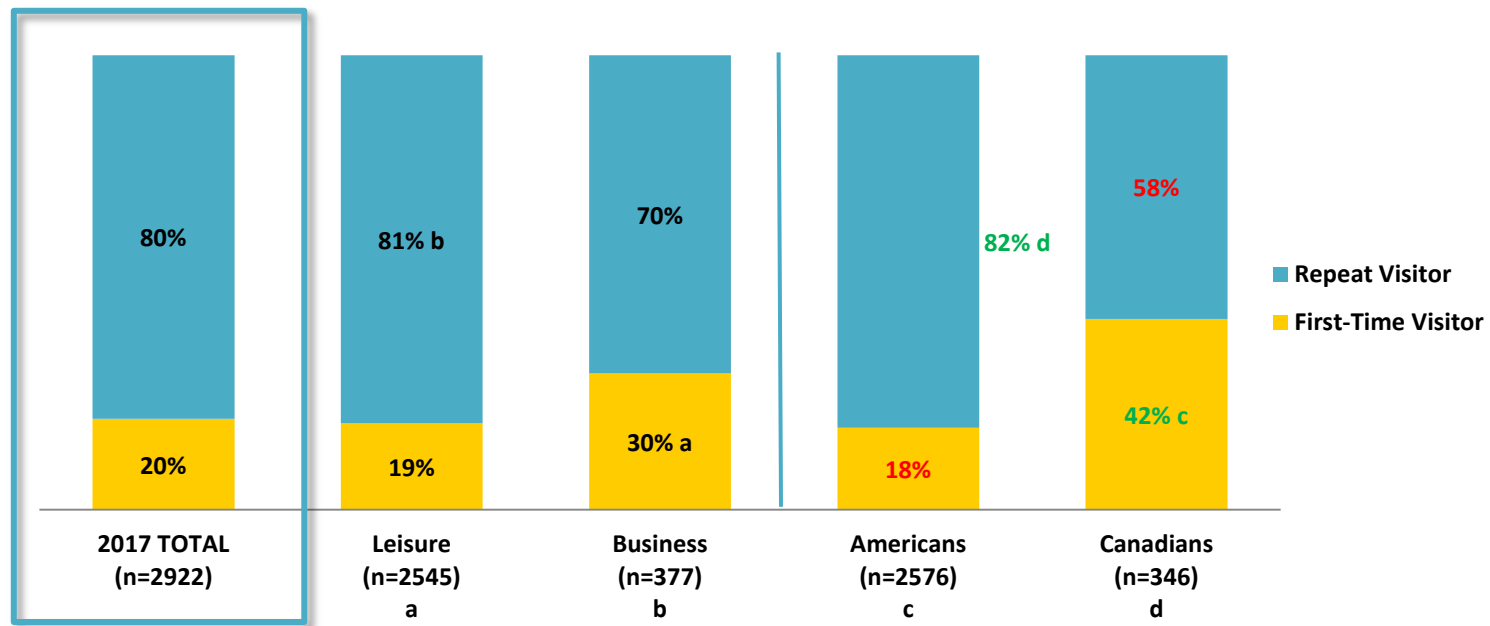| Balanced Achievers (n=1000) a	Genuine Originals (n=947) b	Social Sophisticates (n=258) c
29% bc	13%	13%
Winter (n=528) a	**Summer** (n=1375) b	**Fall** (n=1019) C
27% bc	19%	19%

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

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

Repeat vs. First-Time Visitors Trend

Year	Repeat Visitor	First-Time Visitor
2008 (n=3320)	84%	16%
2009 (n=3057)	86%	14%
2010 (n=2992)	83%	17%
2011 (n=2954)	86%	14%
2012 (n=2497)	86%	14%
2013 (n=2675)	86%	14%
2014 (n=2930)	81%	19%
2015 (n=2779)	80%	20%
2016 (n=2909)	77%	23%
2017 (n=2922)	80%	20%

Q11. Was this your first visit in Maine?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight Visitor Origin

The proportions of Americans and Canadians visiting Maine remained stable in 2017.

- Massachusetts continues to source the greatest proportion of overnight visitors to Maine.
- The proportion of overnight visitors from New England increased between 2016 and 2017 (45% to 60%), while the proportion arriving from the Mid-Atlantic states decreased (42% to 28%).

Location of Residence*

■ 2017 (n=2922)

Region	Value
United States (NET)	88%
New England (NET)	60%
Mid-Atlantic (NET)	28%
Canada (NET)	12%

New England: MA 26%, ME 14%, NH 8%, CT 7%, RI 2%, VT 2%

Mid-Atlantic: NY 14%, PA 6%, NJ 6%, MD 2%, DE <1%, DC <1%

Canada: Ontario 8%, Quebec 2%, New Brunswick 1%, Nova Scotia 1%

Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The origin of visitors varies by season, visitor segment, and lodging.

- Travelers visiting during the summer and fall seasons are more likely to be from New England, while winter visitors are more likely to be Canadian.

- Visitors categorized as *Balanced Achievers* are most likely to be from the Mid-Atlantic states, while *Genuine Originals* and *Social Sophisticates* are more likely to be from New England.

- Visitors staying in paid accommodations are more likely to come from Canada than are visitors staying in unpaid accommodations.

	2017 TOTAL (n=2922)	Season of Visit			Visitor Segment			Accommodations	
		Winter (n=528) a	Summer (n=1375) b	Fall (n=1019) c	Balanced Achievers (n=1000) d	Genuine Originals (n=947) e	Social Sophisticates (n=258) f	Paid (n=1848) g	Unpaid (n=1074) h
United States	88%	84%	91% a	87%	85%	92% d	91%	86%	92% g
New England	60%	54%	62% a	61% a	51%	70% d	68% d	57%	65% g
Mid-Atlantic	28%	31%	29%	26%	34% ef	22%	23%	29%	27%
Canada	12%	16% b	9%	13%	15% e	8%	9%	14% h	8%

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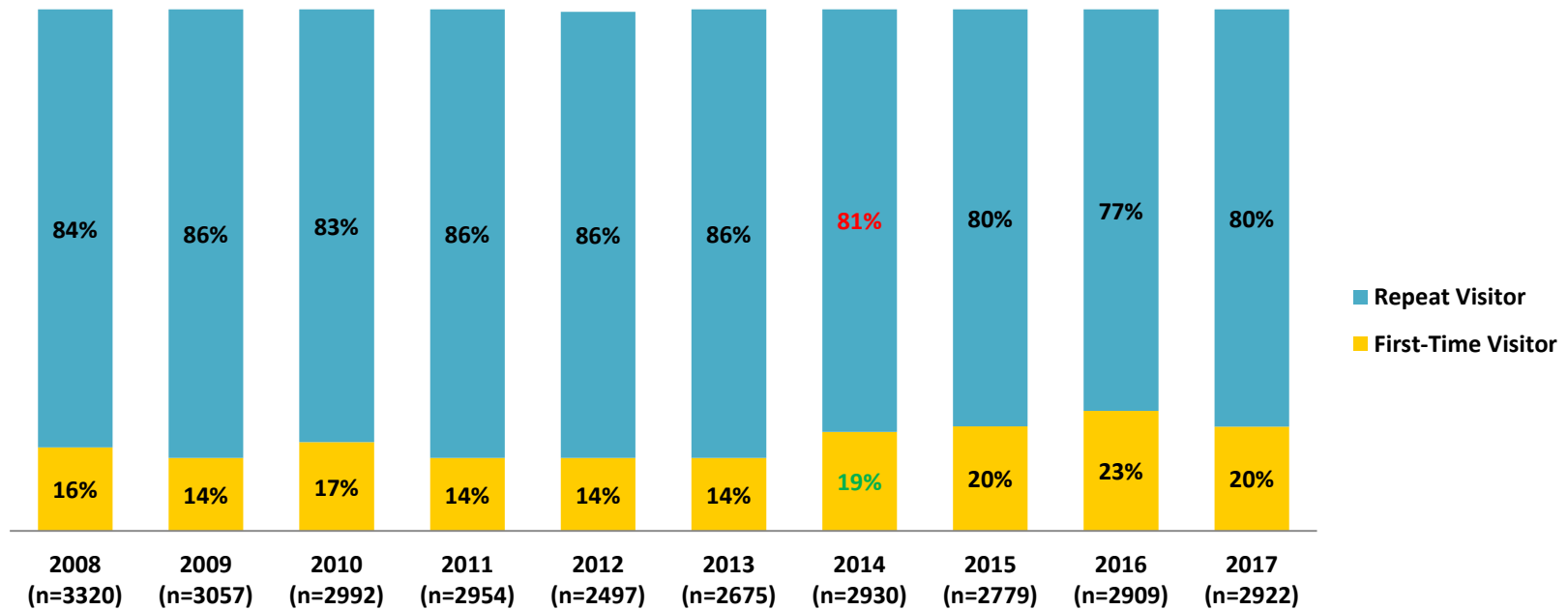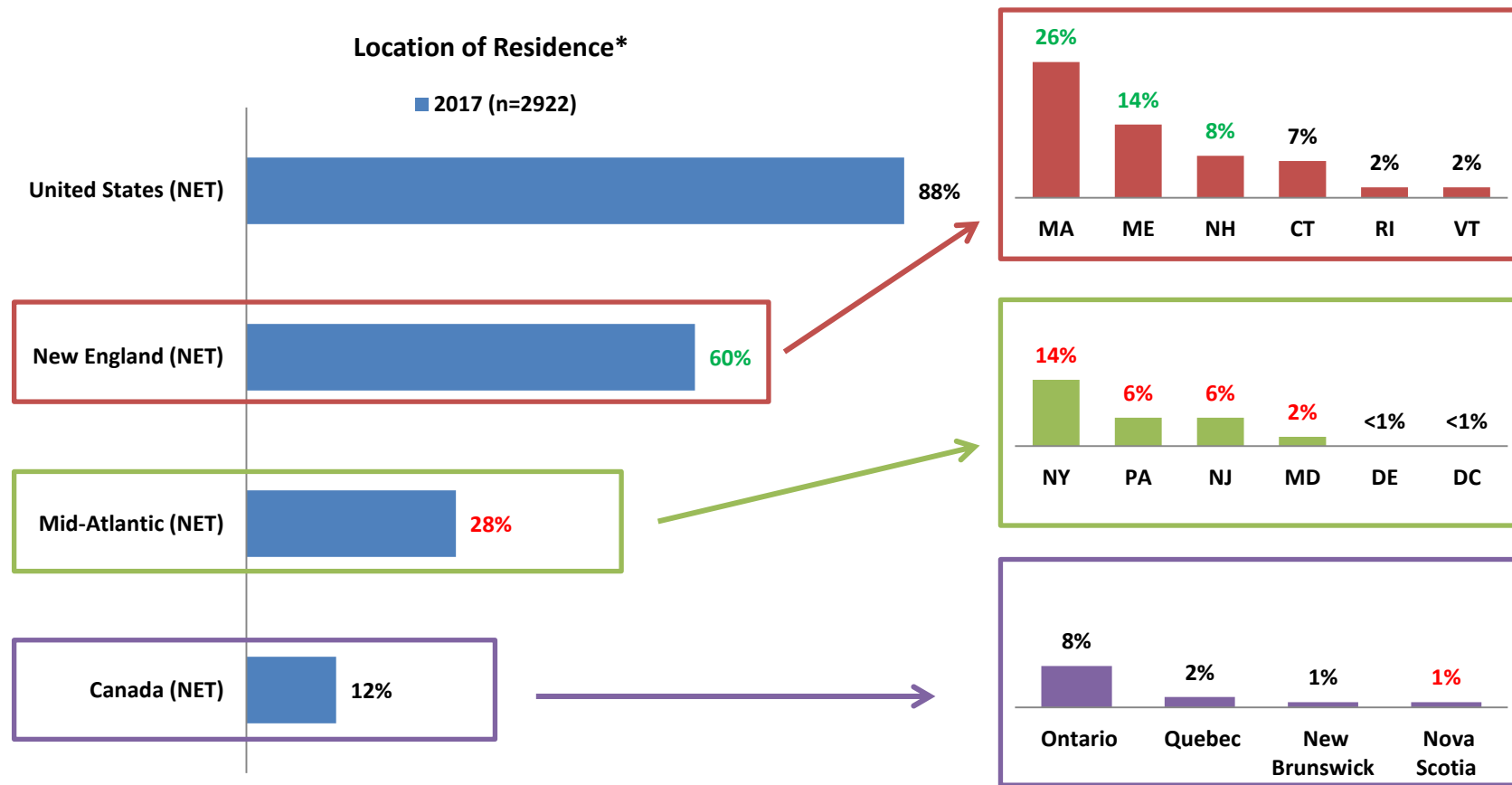<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Ontario and New York are the most likely to send first-time visitors to Maine, as compared to other states and provinces.

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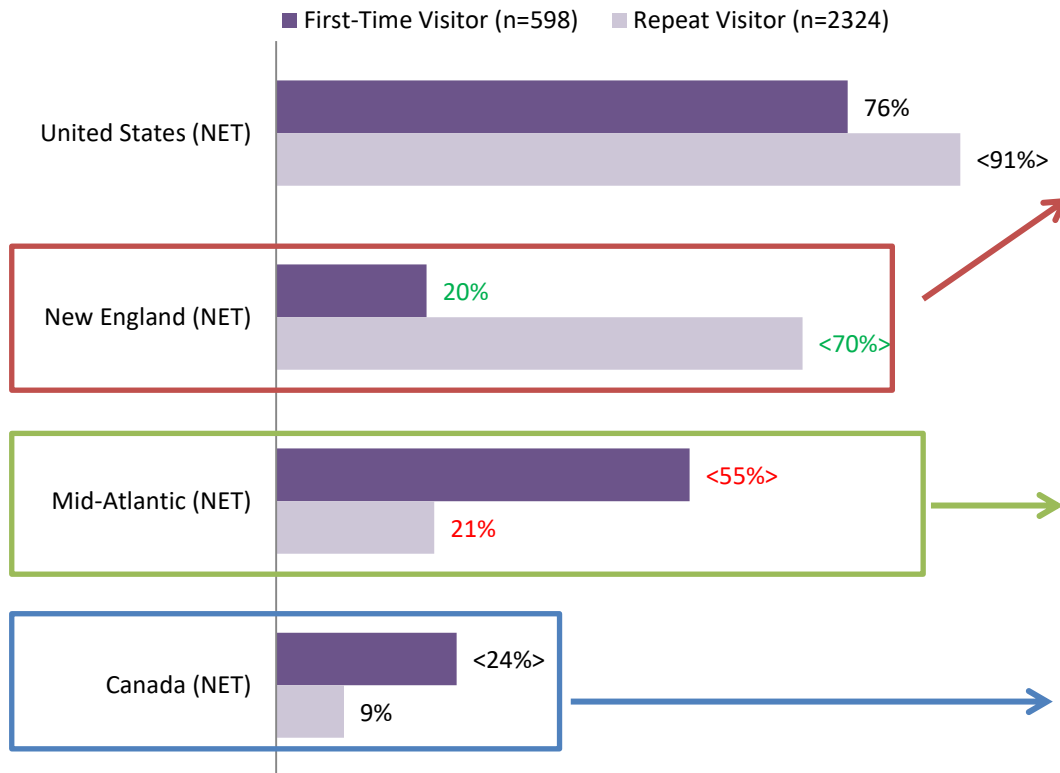
Percentage of First-Time and Repeat Visitors Residing in Each State

■ First-Time Visitor (n=598) ■ Repeat Visitor (n=2324)

United States (NET): 76% / <91%>

New England (NET): 20% / <70%>
- MA <31%> 10%
- ME <17%> 2%
- NH <10%> 1%
- CT <8%> 4%
- RI 2% 2%
- VT 1% <2%>

Mid-Atlantic (NET): <55%> / 21%
- NY <28%> 10%
- PA <10%> 5%
- NJ <11%> 4%
- MD <5%> 2%
- DE 1% <1%

Canada (NET): <24%> / 9%
- ON <19%> 5%
- QB 4% 2%
- NB <1% 1%
- NS <1% 1%

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

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Following relative stability from 2008 to 2011, geographic sources of Maine's overnight visitors have fluctuated from 2012 through 2017.

Maine Overnight Visitor Origin

New England
Mid Atlantic
Canada

2008 (n=3320)	2009 (n=3057)	2010 (n=2992)	2011 (n=2954)	2012 (n=2497)	2013 (n=2675)	2014 (n=2930)	2015 (n=2779)	2016 (n=2909)	2017 (n=2922)

New England: 39%, 39%, 40%, 42%, 43%, 37%, 52%, 47%, 45%, 60%

Mid Atlantic: 38%, 35%, 38%, 39%, 31%, 34%, 33%, 40%, 42%, 28%

Canada: 14%, 16%, 16%, 15%, 20%, 27%, 16%, 13%, 14%, 12%

State/ Province of Residence
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight Visitor Experience in Maine

Regional visitation patterns remain mostly stable, with the highest proportion of overnight visitors reporting that the Maine Beaches region was their primary destination.

- Minor shifts in visitation can be seen:
  - An <u>increase</u> in the proportion of travelers listing the *Greater Portland* region as their primary destination, and
  - A <u>decrease</u> in the proportion of travelers listing the *Maine Highlands* region as their primary destination.

Primary Region of Visit

Region	2016 (n=2909)	2017 (n=2922)
Maine Beaches	24%	23%
Downeast & Acadia	15%	15%
The Maine Highlands	16%	14%
Greater Portand & Casco Bay	10%	14%
Maine Lakes and Mountains	12%	12%
Mid-Coast	11%	10%
Kennebec Valley	7%	6%
Aroostook County	4%	4%

Q28. What region in Maine was your primary destination?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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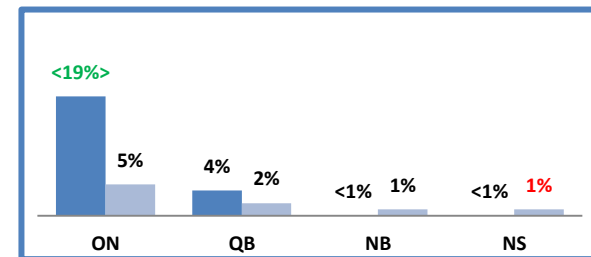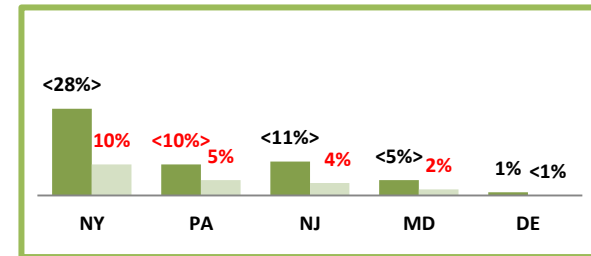providing direction
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<u>Overall</u> visitation is also highest for the Maine Beaches region, followed by the Greater Portland and Downeast regions.

- The following types of travelers visited a greater number of regions, on average, than their counterparts:
  - First-time visitors (2.0 regions),
  - Visitors traveling with children (1.9),
  - Balanced Achievers (2.0),
  - Maine residents (1.9), and
  - Travelers residing outside New England (2.0).

Region of Visit – Primary and Secondary

Average # of Regions Visited: **1.8**

Legend:
- Other Regions Visited
- Primary Region Visited

Region	Other Regions Visited	Primary Region Visited	Total
Maine Beaches	17%	23%	40%
Greater Portland & Casco Bay	15%	14%	28%
Downeast & Acadia	9%	15%	25%
Mid-Coast	12%	10%	22%
The Maine Highlands	7%	14%	21%
Maine Lakes and Mountains	9%	12%	21%
Kennebec Valley	7%	6%	13%
Aroostook County	4%	4%	8%
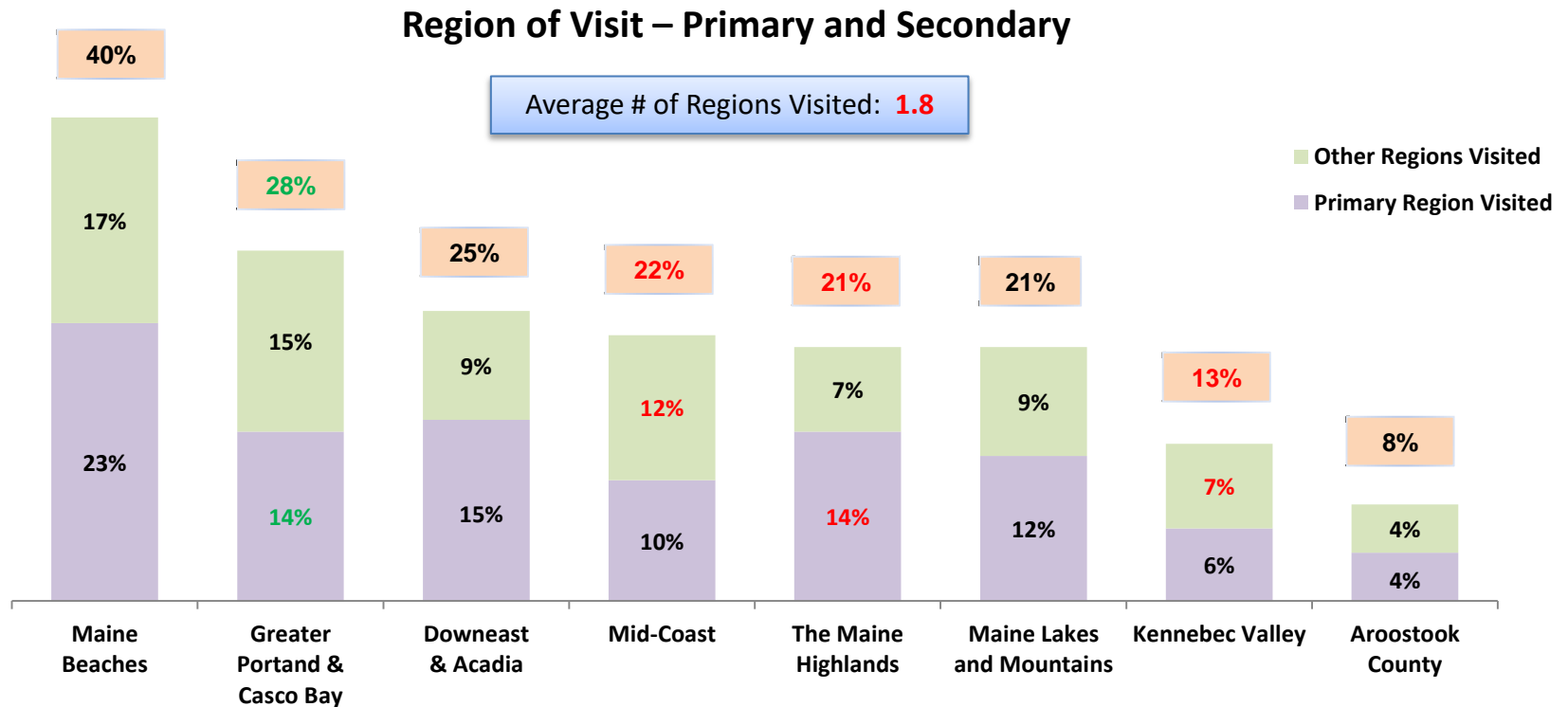
Q28. What region in Maine was your primary destination?
Q30. What other regions, if any, did you visit while you were in Maine?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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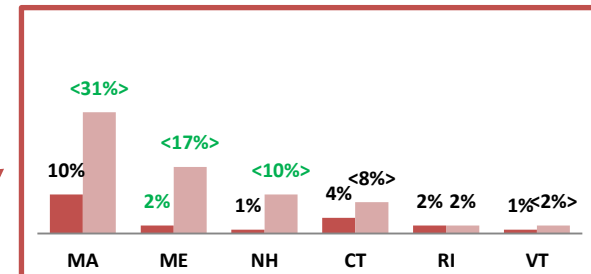providing direction
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Canadian and American travelers differ in some of the primary regions they visit in Maine.

- Canadians are more likely than American travelers to visit the *Maine Highlands* and *Downeast & Acadia*.
- American travelers are more likely than Canadians to visit the *Maine Beaches* and the *Greater Portland* regions.
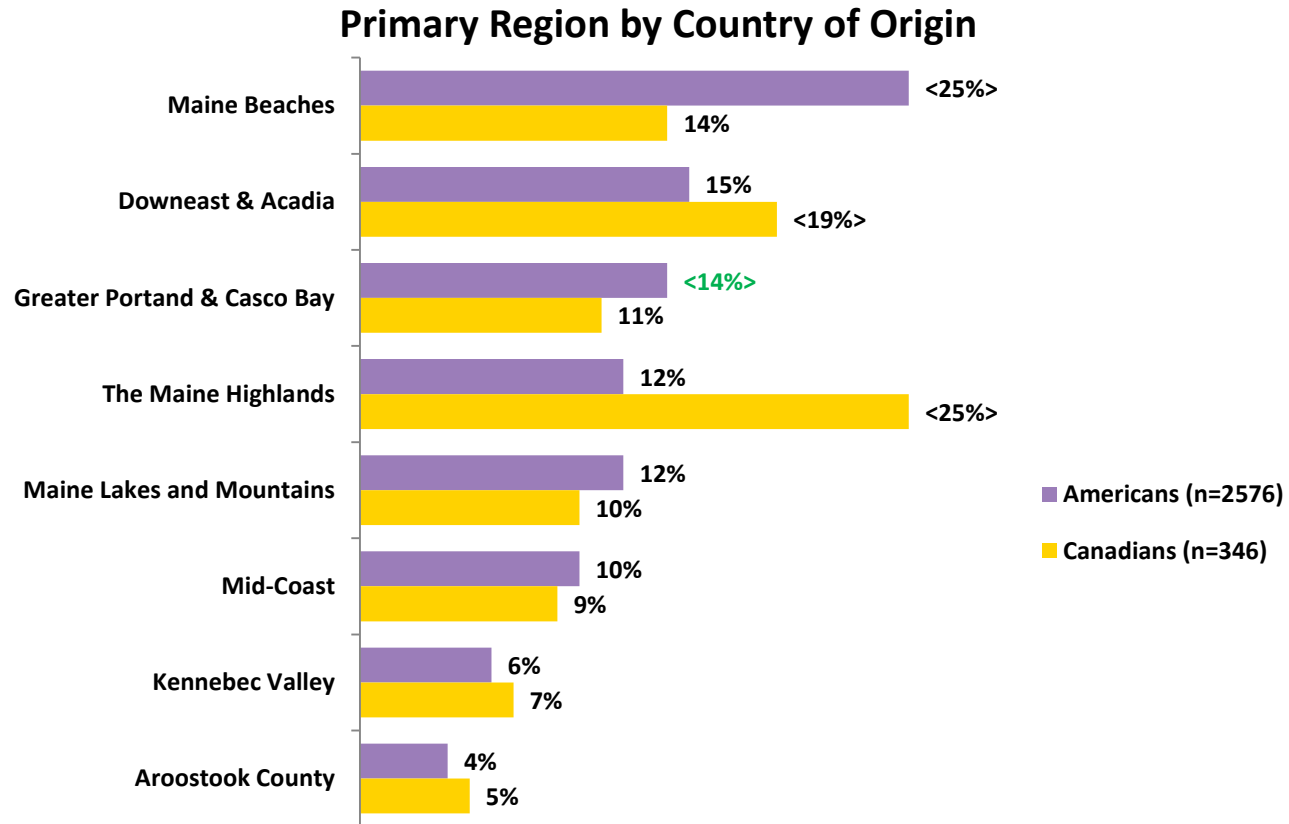
Primary Region by Country of Origin

Region	Americans	Canadians
Maine Beaches	<25%>	14%
Downeast & Acadia	15%	<19%>
Greater Portland & Casco Bay	<14%>	11%
The Maine Highlands	12%	<25%>
Maine Lakes and Mountains	12%	10%
Mid-Coast	10%	9%
Kennebec Valley	6%	7%
Aroostook County	4%	5%

■ Americans (n=2576)
■ Canadians (n=346)

Q28. What region in Maine was your primary destination?
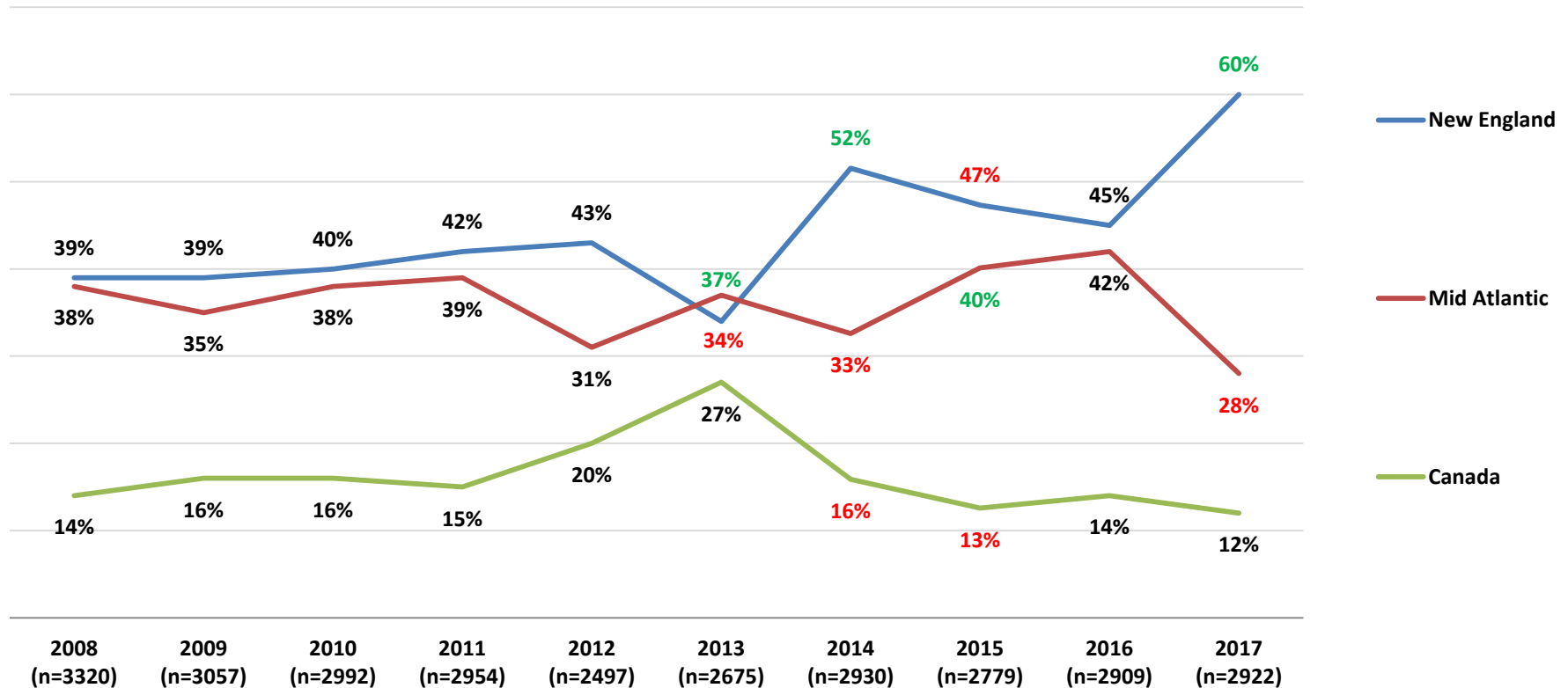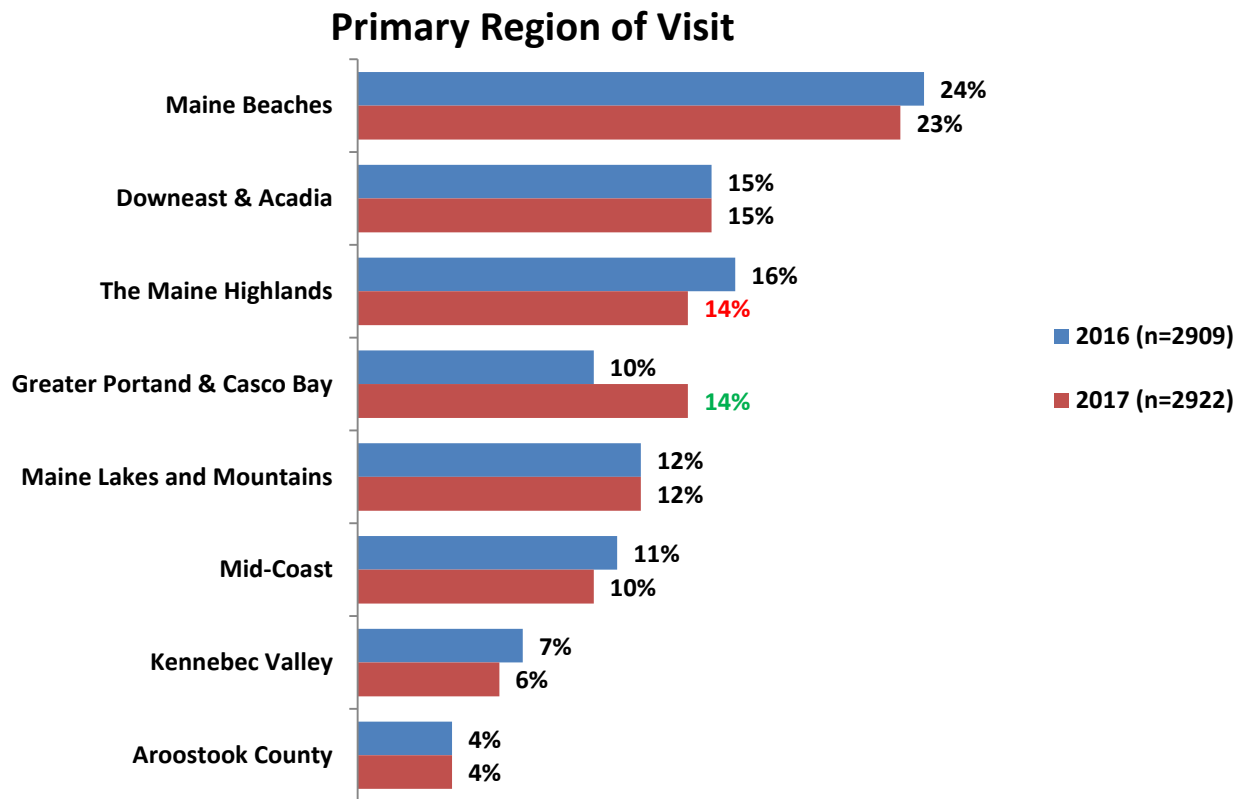<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Leisure travelers overall are more likely to visit the *Maine Beaches* and the *Downeast & Acadia* regions than are business travelers.
- Business travelers, on the other hand, are more likely than leisure travelers to visit the *Maine Highlands* region and the *Kennebec Valley* region.
- The most popular regions for business travelers are the *Maine Highlands* region and the *Greater Portland* region, while the most popular region for leisure travelers is the *Maine Beaches* region.

Primary Region by Trip Type

Region	Leisure	Business
Maine Beaches	<25%>	11%
Downeast & Acadia	<16%>	12%
The Maine Highlands	13%	<21%>
Greater Portand & Casco Bay	13%	17%
Maine Lakes and Mountains	12%	11%
Mid-Coast	10%	10%
Kennebec Valley	6%	<11%>
Aroostook County	4%	7%

Leisure (n=2545)
Business (n=377)

Q28. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- First-time overnight visitors are more likely than repeat visitors to be visiting the *Maine Highlands* region and *Aroostook County* as their primary destinations. Repeat visitors, on the other hand, are more likely to list the *Maine Beaches* and *Greater Portland/Casco Bay* regions as their primary destinations.

Primary Region by First-Time/Repeat Visitors

Region	First-Time Visitor (n=598)	Repeat Visitor (n=2324)
Maine Beaches	17%	<25%>
Downeast & Acadia	18%	15%
Greater Portland & Casco Bay	9%	<15%>
The Maine Highlands	<17%>	13%
Maine Lakes and Mountains	12%	12%
Mid-Coast	11%	10%
Kennebec Valley	7%	6%
Aroostook County	<7%>	4%

■ First-Time Visitor (n=598)
■ Repeat Visitor (n=2324)

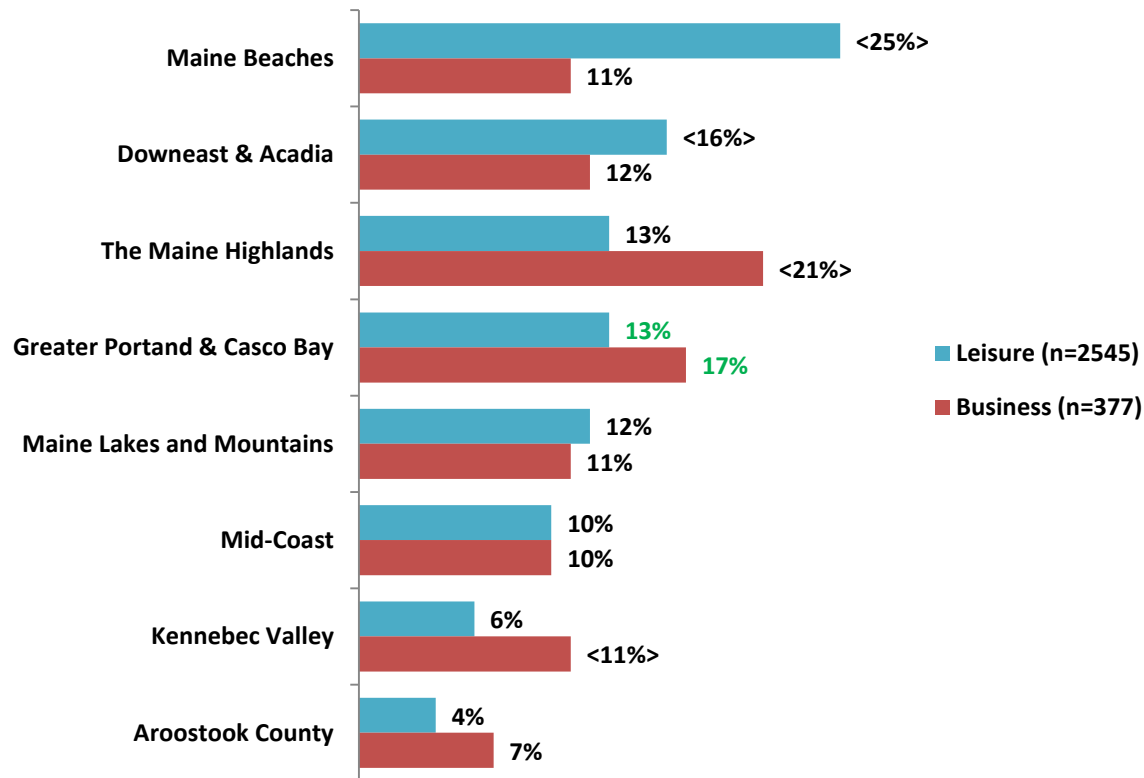Q28. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Regional destinations also differ by the type of accommodations travelers stay in while visiting.

- Overnight visitors staying in paid accommodations are more likely than those staying in unpaid accommodations to state that the *Maine Beaches, Downeast & Acadia,* and *Greater Portland* regions are their primary destinations.

- Those staying in <u>unpaid</u> accommodations are more likely to list the *Maine Highlands, Lakes & Mountains,* and *Kennebec Valley* regions as their primary destinations.

Primary Region by Accommodations

Region	Paid Accommodations (n=1848)	Unpaid Accommodations (n=1074)
Maine Beaches	<26%>	18%
Downeast & Acadia	<18%>	12%
Greater Portand & Casco Bay	<15%>	11%
The Maine Highlands	12%	<16%>
Maine Lakes and Mountains	9%	<16%>
Mid-Coast	10%	10%
Kennebec Valley	5%	<9%>
Aroostook County	4%	6%

■ Paid Accommodations (n=1848)
■ Unpaid Accommodations (n=1074)

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

- Travelers listing the *Downeast & Acadia* region and the *Maine Beaches* region as their primary destination are more likely to state that they <u>definitely will recommend</u> that region to friends or relatives, as compared to visitors listing any of the other regions as their primary destination.
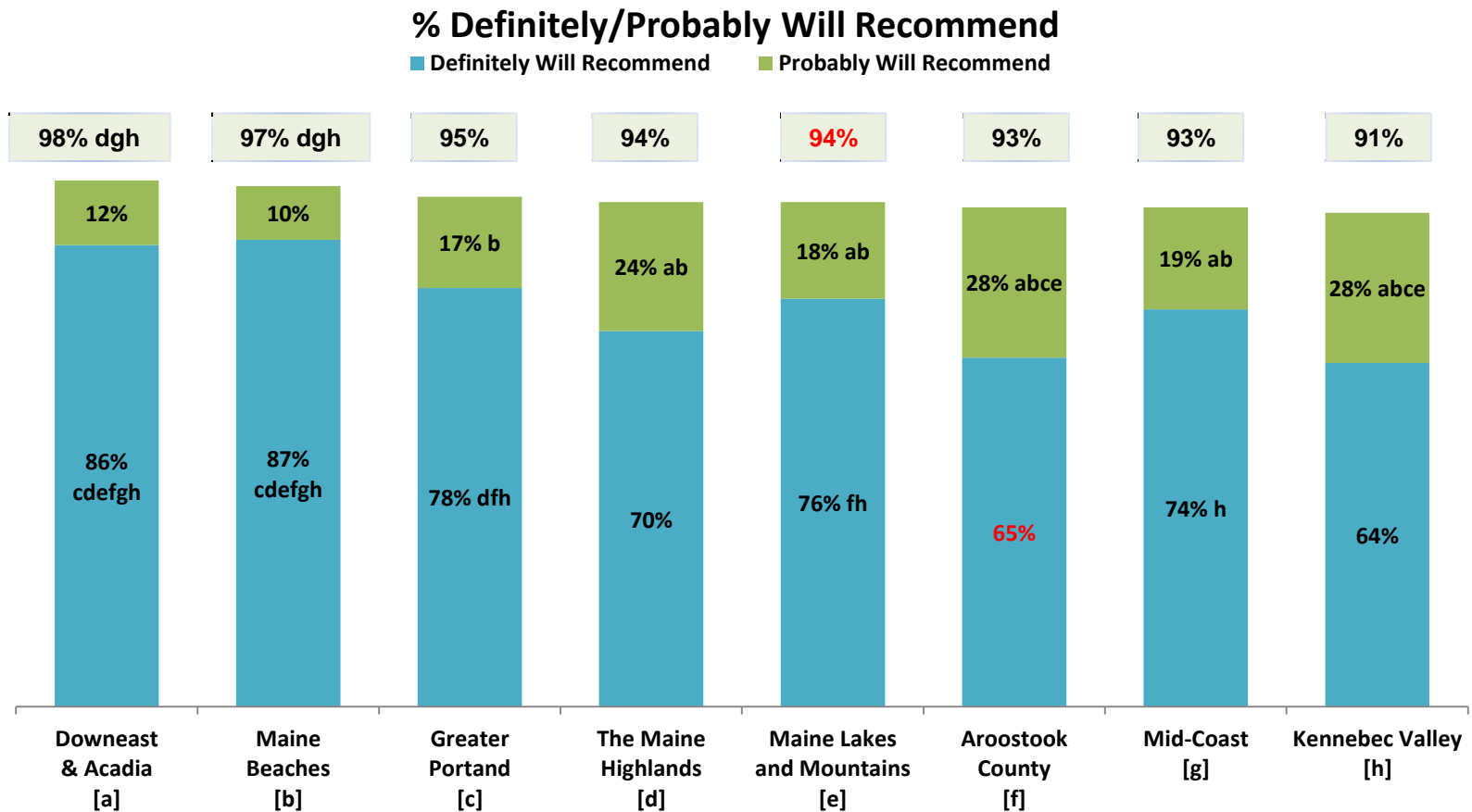
% Definitely/Probably Will Recommend

- Definitely Will Recommend
- Probably Will Recommend

	Downeast & Acadia [a]	Maine Beaches [b]	Greater Portland [c]	The Maine Highlands [d]	Maine Lakes and Mountains [e]	Aroostook County [f]	Mid-Coast [g]	Kennebec Valley [h]
Total	98% dgh	97% dgh	95%	94%	94%	93%	93%	91%
Probably Will Recommend	12%	10%	17% b	24% ab	18% ab	28% abce	19% ab	28% abce
Definitely Will Recommend	86% cdefgh	87% cdefgh	78% dfh	70%	76% fh	65%	74% h	64%

Q29. How likely will you be to recommend the [primary region visited] region to friends or relatives?
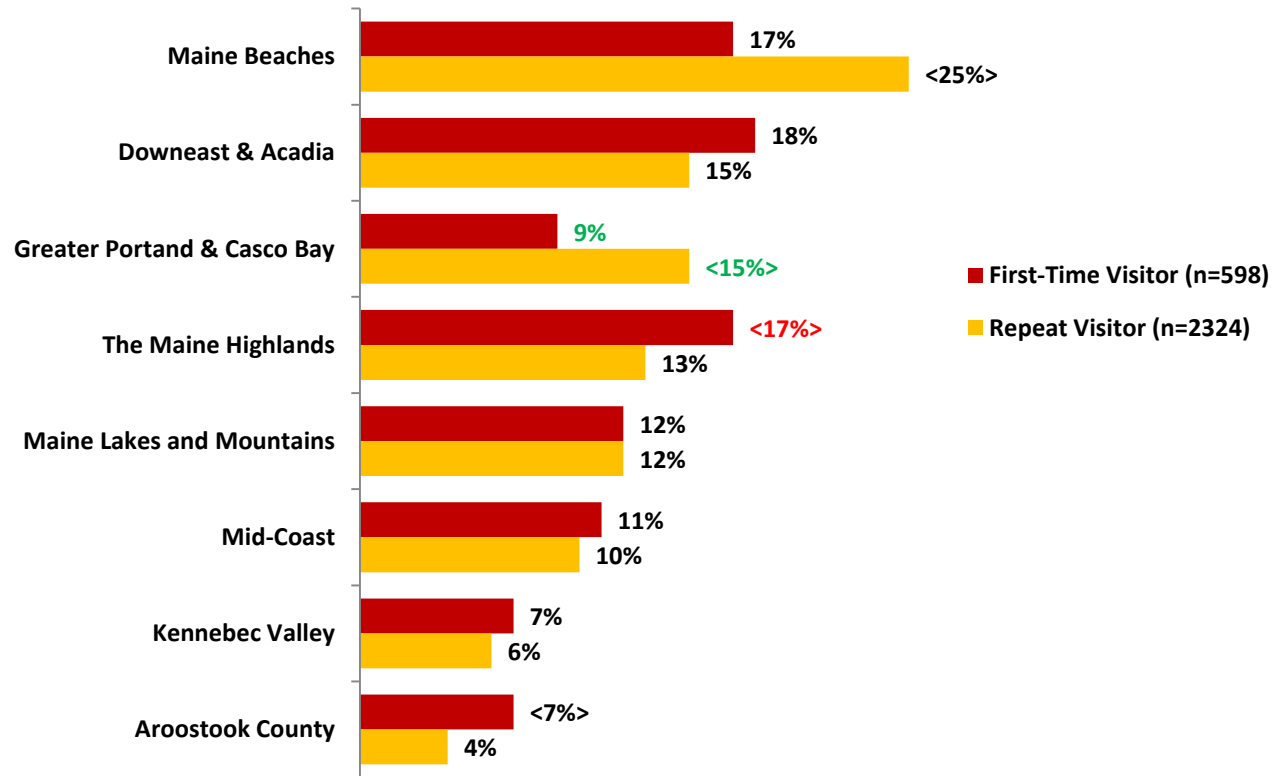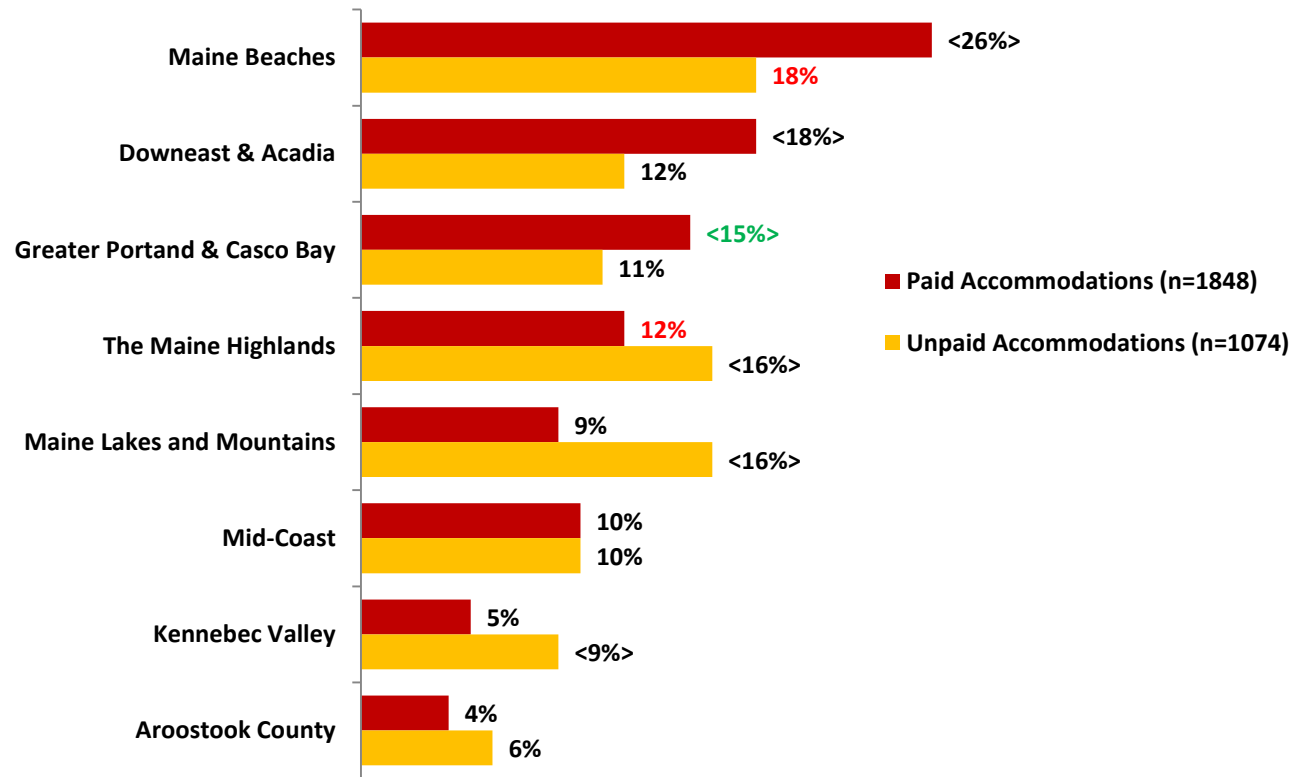<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Four-fifths of Maine's overnight visitors stayed in Maine for their entire trip.

- Among the 19% who also visited nearby states/provinces while traveling to Maine, the highest proportion spent some time in New Hampshire.

- American travelers from outside New England, first-time visitors, travelers staying in unpaid accommodations, and those traveling with children are all more likely to have visited other states while on their trip to Maine.

State/Province of Residence Visited
■ Travelers who also visited nearby states/provinces 2017 (n=560)
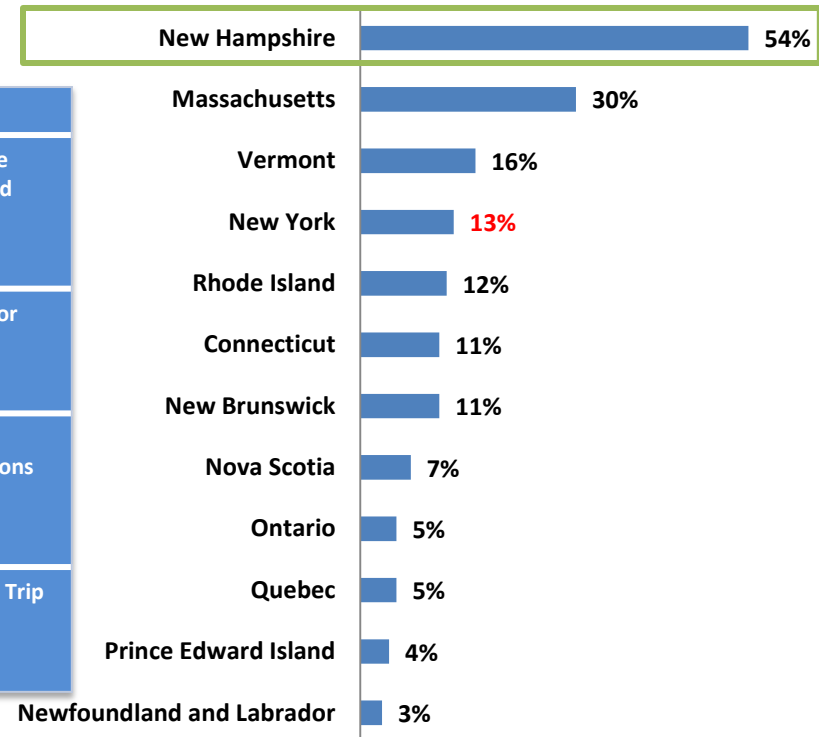
State/Province	%
New Hampshire	54%
Massachusetts	30%
Vermont	16%
New York	13%
Rhode Island	12%
Connecticut	11%
New Brunswick	11%
Nova Scotia	7%
Ontario	5%
Quebec	5%
Prince Edward Island	4%
Newfoundland and Labrador	3%

Visited Nearby States/Providences
2017 (n=2922)

■ Yes
■ No

19%
81%

Visited Other States/Provinces

Live in New England (n=1757)	Live Outside New England (n=818)
16%	<26%>

First-Time Visitor (n=598)	Repeat Visitor (n=2324)
<26%>	17%

Paid Accommodations (n=1848)	Unpaid Accommodations (n=1074)
18%	<21%>

Children on Trip (n=936)	No Children on Trip (n=1986)
<23%>	17%

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Overnight Visitor
Interest Areas and Activities

Overnight VFR trips to Maine in 2017 were most frequently a general visit to see friends or relatives.

Primary Purpose of Overnight VFR Trips

■ VFR (n=1224)

Purpose	Percentage
General visit to see friends or relatives	60%
Holiday visit	13%
Wedding	11%
Family reunion	9%
Funeral	3%
Class reunion	<1%
Other	3%
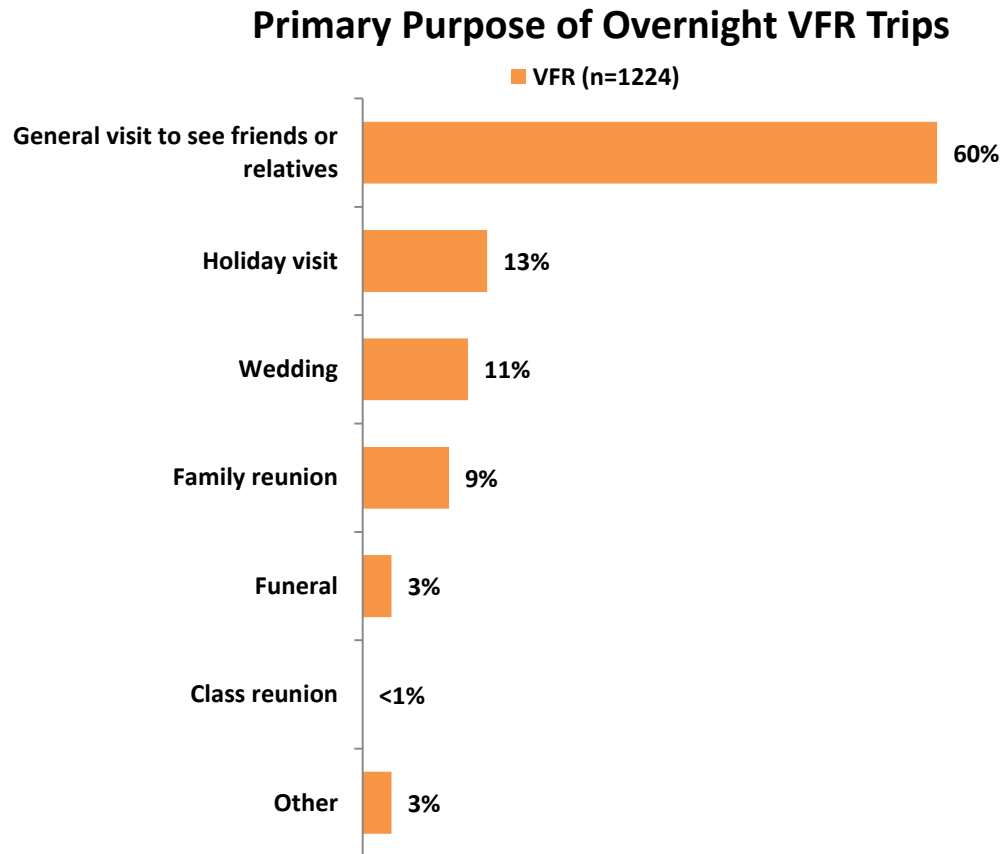
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

54

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

- American business travelers are more likely than Canadian business travelers to be in Maine for *training/professional development*, while Canadians are more likely to be in Maine for a *general meeting*.

Primary Purpose of Overnight Business Trips

■ Business (n=377)

	Americans (n=297)	Canadians (n=80)
Meeting	32%	<46%>
Training/ Professional Development	<25%>	13%

- Meeting — 35%
- Convention/Conference/Trade Show — 24%
- Training/Professional Development — 22%
- Sales/Service — 16%
- Other — 3%

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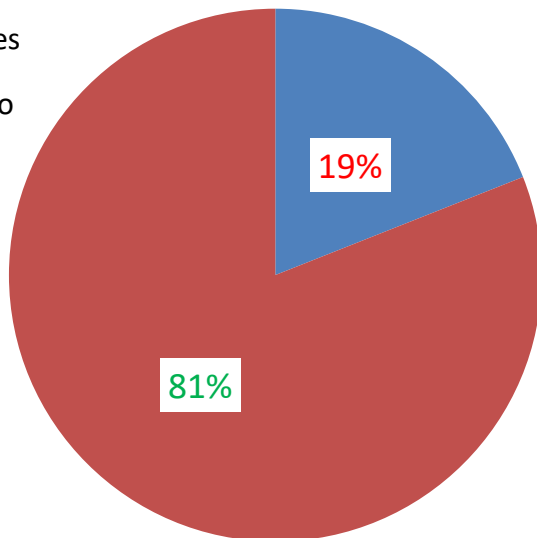Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Food/beverage/culinary activities remain the most popular interest area among overnight visitors in 2017.

- *Shopping* and *touring/sightseeing* follow closely behind.
- Among those interested in *touring/sightseeing*, half rank it as the <u>most important</u> in their decision to visit Maine. Similarly, half of those who are interested in *family fun or children's activities* say that interest area was the most important.
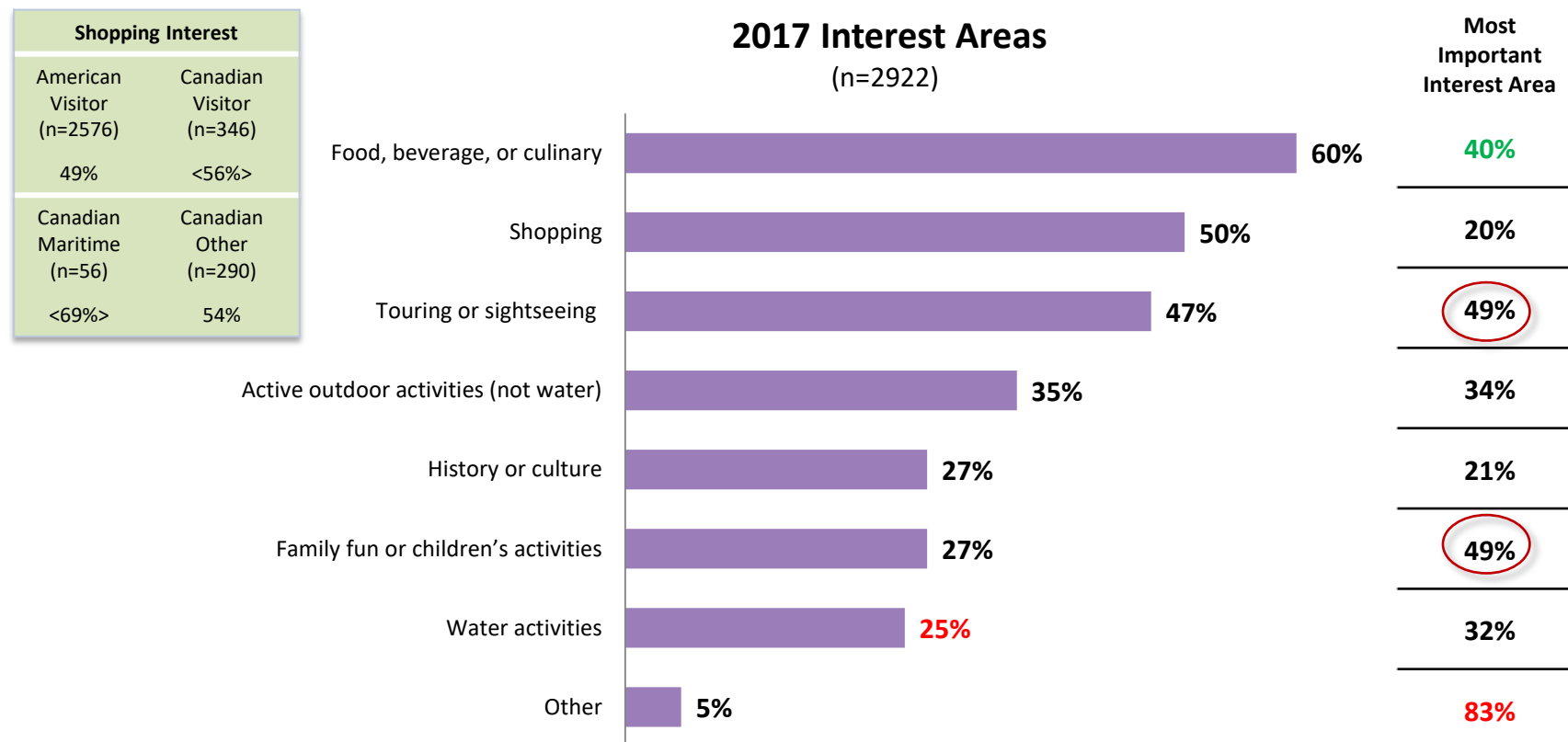
Shopping Interest	
American Visitor (n=2576)	Canadian Visitor (n=346)
49%	<56%>
Canadian Maritime (n=56)	Canadian Other (n=290)
<69%>	54%

2017 Interest Areas
(n=2922)

Most Important Interest Area

Interest Area	2017	Most Important
Food, beverage, or culinary	60%	**40%**
Shopping	50%	20%
Touring or sightseeing	47%	(49%)
Active outdoor activities (not water)	35%	34%
History or culture	27%	21%
Family fun or children's activities	27%	(49%)
Water activities	25%	32%
Other	5%	83%

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When analyzing <u>both interest and importance</u> in deciding to visit, *food/beverage/culinary* and *touring/sightseeing* activities rank highest.

- *Food/beverage/culinary* activities score <u>higher</u> on the Importance Index in 2017 than in 2016 (24% versus 21% in 2016), while *history/culture* activities score <u>lower</u> in 2017 (6% versus 8% in 2016).

2017 Interest Areas
Importance Index

Interest Area	Value
Food, beverage, or culinary	24%
Touring or sightseeing	23%
Family fun or children's activities	13%
Active outdoor activities (not water)	12%
Shopping	10%
Water activities	8%
History or culture	6%
Other	4%

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

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Interest areas differ by age, number of previous visits, and presence of children in the travel party.

- As expected, *water activities* and *family fun/children's activities* are more popular with travel parties that include children.
- First-time visitors are more likely to be interested in *touring/sightseeing, history/culture,* and *water activities* than are repeat visitors.

Interest Area	2017 TOTAL (n=2922)	Kids on Trip		First-Time Visitor/ Repeat Visitor		Age		Accommodations	
		Kids (n=936) a	No Kids (n=1986) b	First-Time (n=598) c	Repeat (n=2324) d	< 45 yrs (n=1814) e	45+ yrs (n=1108) f	Paid (n=1848) g	Unpaid (n=1074) h
Food, beverage, or culinary	60%	57%	62% a	60%	60%	60%	61%	64% h	54%
Shopping	50%	52%	49%	49%	50%	47%	55% e	52% h	46%
Touring or sightseeing	47%	47%	47%	56% d	45%	47%	47%	52% h	39%
Active outdoor activities (not water)	35%	37%	34%	36%	35%	40% f	27%	36%	35%
History or culture	27%	29%	26%	39% d	24%	27%	27%	29% h	24%
Family fun or children's activities	27%	59% b	13%	25%	28%	31% f	21%	23%	34% g
Water activities	25%	34% b	21%	29% d	24%	27% f	22%	24%	26%
Other	5%	2%	6% a	2%	6% c	2%	9% e	4%	5%

Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Travelers' interest areas also vary by visitor segment classification.

- Travelers categorized as Social Sophisticates are more likely to be interested in *food/beverage/culinary* activities than are those categorized as Balanced Achievers or Genuine Originals. Genuine Originals are the <u>least likely</u> to be interested in *shopping*.

- Genuine Originals are more likely than the remaining visitor segments to be interested in *active outdoor (non-water)* activities.

- Balanced Achievers are more likely to be interested in *history or culture* activities.

Interest Areas by Visitor Segment

Legend: ■ Balanced Achievers (n=1000) a   ■ Genuine Originals (n=947) b   ■ Social Sophisticates (n=258) c

Interest Area	Balanced Achievers	Genuine Originals	Social Sophisticates
Food/ beverage/ culinary	61%	62%	71% ab
Shopping	58% b	44%	61% b
Active Outdoor (not water)	37%	43% ac	31%
Water activities	28% b	23%	23%
Touring or sightseeing	54%	50%	46%
Family fun or children's activities	32% b	21%	27%
History or culture	34% bc	29% c	17%

Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
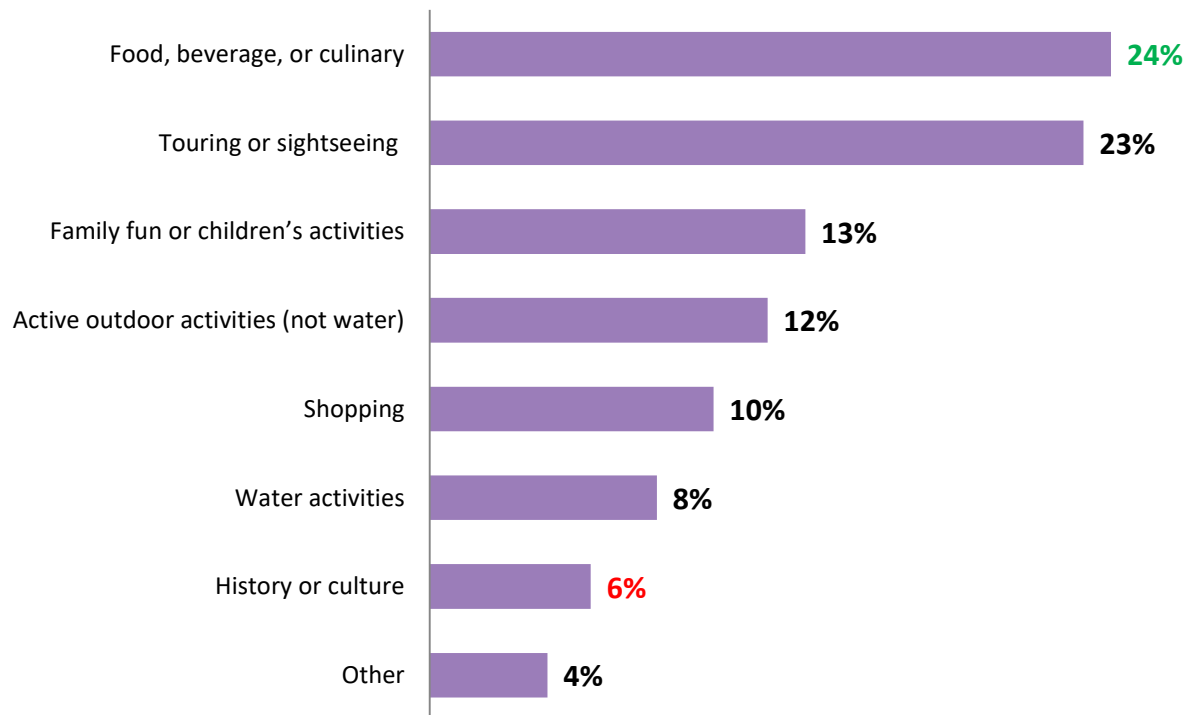<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
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Looking specifically at visitors who list touring/sightseeing as a broad interest area, *general sightseeing* activities are the most popular.

- Following as a close second is *enjoying the ocean views or rocky coast*.
- Visitors categorized as Balanced Achievers and Genuine Originals differ in the types of touring/sightseeing activities they participate in while visiting Maine.

Touring or Sightseeing Activities

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

■ 2016 (n=1407) ■ 2017 (n=1383)

Activity	2016	2017
Sightseeing	71%	73%
Enjoying the ocean views or rocky coast	65%	65%
Driving for pleasure	56%	57%
Enjoying the mountain views	51%	48%
Wildlife viewing or bird watching	28%	27%
Viewing fall colors	23%	24%
Taking tours of communities or local architecture	21%	19%
Nature cruises or tours	16%	16%

	Balanced Achievers (n=539) a	Genuine Originals (n=472) b	Social Soph. (n=119) c
Sightseeing	69%	79% a	72%
Enjoying ocean views/rocky coast	56%	76% a	70% a
Driving for pleasure	55%	67% a	58%
Enjoying mountain views	50%	49%	49%
Wildlife viewing/bird watching	29% c	30% c	12%
Viewing fall colors	30% bc	21%	18%
Tours of local communities/architecture	24% b	16%	26%
Nature cruises or tours	22% bc	14%	11%

Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
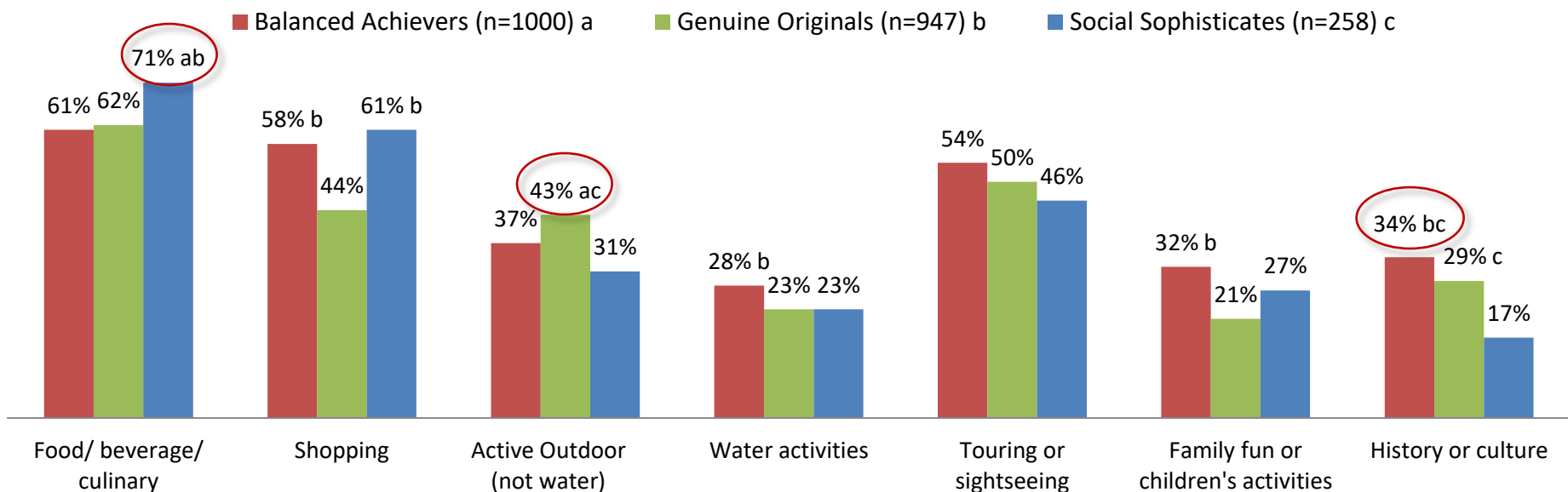<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- *Eating lobster or other local seafood* is more popular among domestic visitors than it is among Canadian visitors.

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

■ 2016 (n=1729)　■ 2017 (n=1761)

Activity	2016	2017
Ate lobster or other local seafood	62%	59%
Consumed other locally produced Maine foods (i.e., blueberries, maple syrup, or apples)	42%	48%
Enjoyed unique Maine food or beverages (i.e., whoopie pies or Moxie)	40%	42%
Going to local brew pubs or craft breweries	36%	34%
Visited Farmer's Markets	28%	24%
Enjoying local food at fairs or festivals	27%	22%
Enjoyed high-end cuisine or five-star dining	20%	18%
Ate farm to table or organic cuisine	18%	16%

Eating Lobster or Other Local Seafood	
American Visitor (n=1558)	Canadian Visitor (n=204)
<60%>	51%

Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
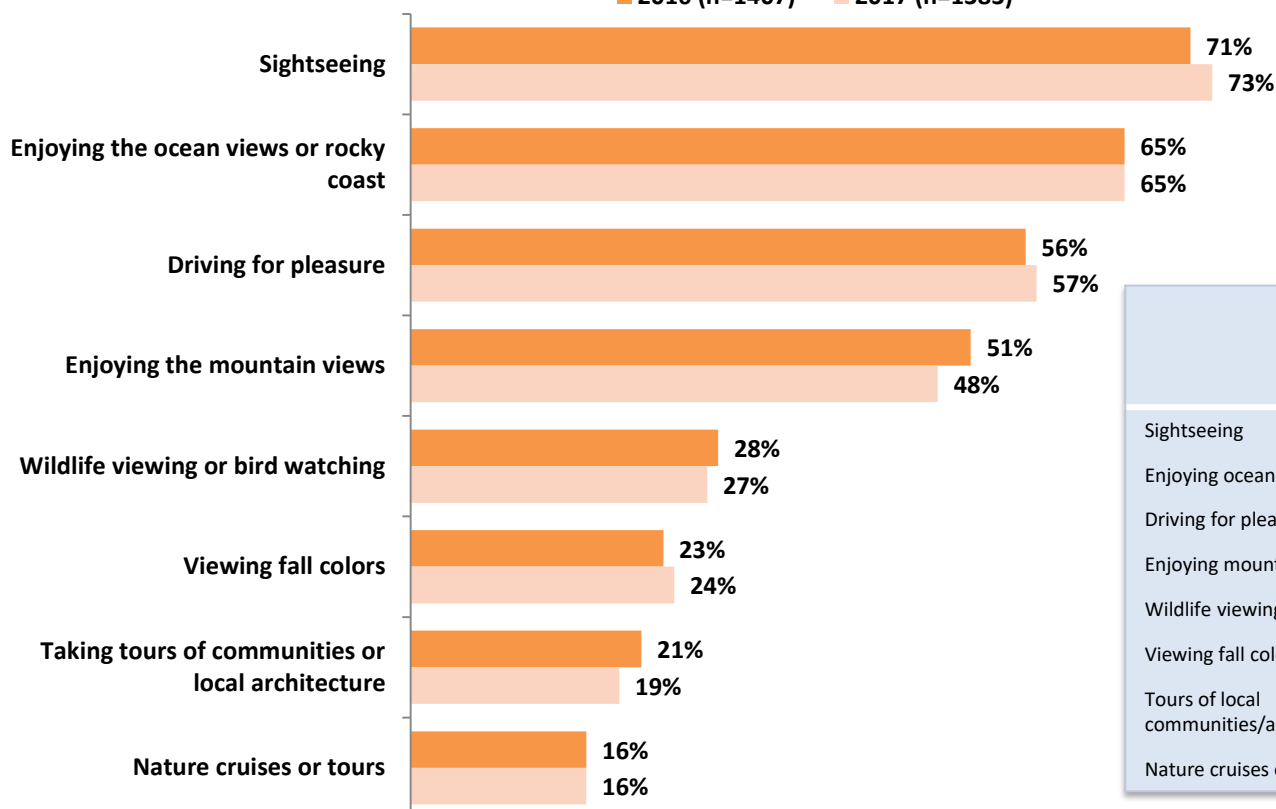
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Going to the beach is the most frequently cited water activity among visitors selecting this interest area.

- A greater proportion of travelers interested in water activities report *going to the beach* while in Maine in 2017, as compared to 2016.

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

■ 2016 (n=823) ■ 2017 (n=723)

Activity	2016	2017
Going to the beach	60%	67%
Outdoor swimming (lake, ocean, river)	45%	46%
Pool swimming (indoor or outdoor)	34%	33%
Canoeing or kayaking	28%	30%
Fishing (ocean, lake, stream, river, ice)	28%	24%
Motor boating	14%	14%
Water skiing or jet skiing	12%	11%
Sailing	12%	9%
White water rafting	10%	9%
Surfing	5%	5%

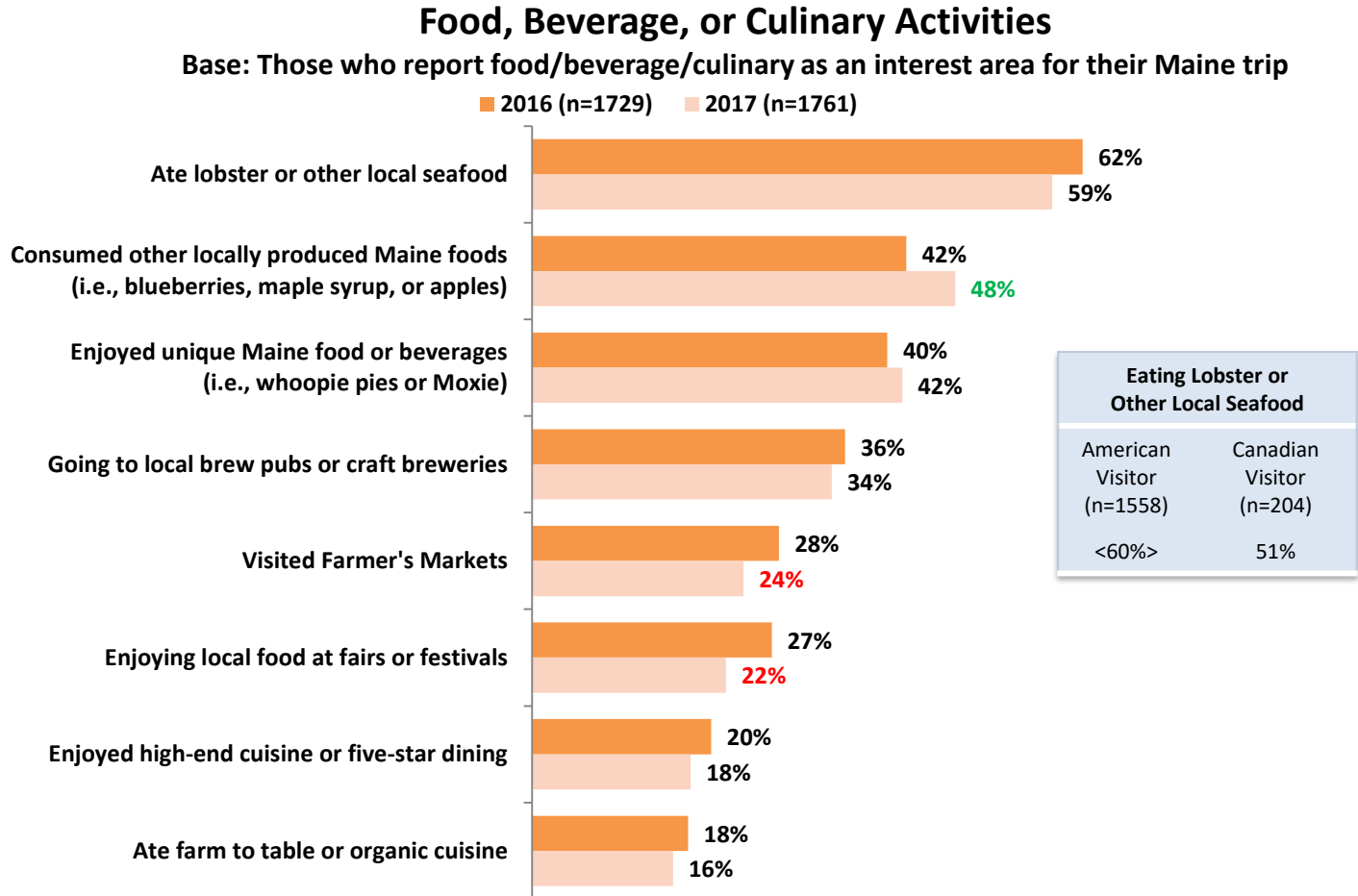|	Balanced Achievers (n=283) a	Genuine Originals (n=219) b	Social Soph. (n=60) c
Going to the beach	62%	74% a	86% a
Outdoor swimming (lake, ocean, river)	44%	45%	64% ab
Pool swimming (indoor or outdoor)	36% b	25%	44% b
Canoeing or kayaking	33%	34%	19%
Fishing (ocean, lake, stream, river, ice)	34% bc	15%	19%
Motor boating	16%	11%	14%
Water skiing or jet skiing	19% bc	4%	6%
Sailing	13% bc	6%	3%
White water rafting	13% bc	3%	1%
Surfing	9% bc	<1%	3%

Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Hiking/climbing/backpacking is the top activity for visitors interested in outdoor recreation, followed by *exploring State and National Parks*.

- Travelers categorized as *Balanced Achievers* are more likely to have participated in several of these active outdoor activities, as compared to travelers categorized as *Genuine Originals* or *Social Sophisticates.*

Active Outdoor Activities – Non-Water

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

■ 2016 (n=985) ■ 2017 (n=1032)

Hiking, climbing, or backpacking	56% / 60%
Exploring State and National Parks	40% / 40%
Camping	23% / 22%
Bicycling or mountain biking	21% / 16%
Riding all-terrain vehicles	11% / 10%
Hunting (game or bird)	7% / 5%
Alpine skiing or snowboarding	5% / 4%
Snowmobiling	4% / 3%
Snowshoeing	4% / 3%
Nordic skiing	3% / 2%

	Balanced Achievers (n=283) a	Genuine Originals (n=219) b	Social Soph. (n=60) c
Hiking/climbing/backpacking	50%	69% a	63%
Exploring State & Nat'l Parks	40%	44%	44%
Camping	28% bc	21% c	6%
Bicycling or mountain biking	19%	13%	9%
Riding all-terrain vehicles	17% bc	6%	9%
Hunting (game or bird)	9% bc	1%	1%
Alpine skiing or snowboarding	6% bc	2%	1%
Snowmobiling	6% b	1%	2%
Snowshoeing	6% b	1%	--
Nordic skiing	5% b	<1%	--

Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
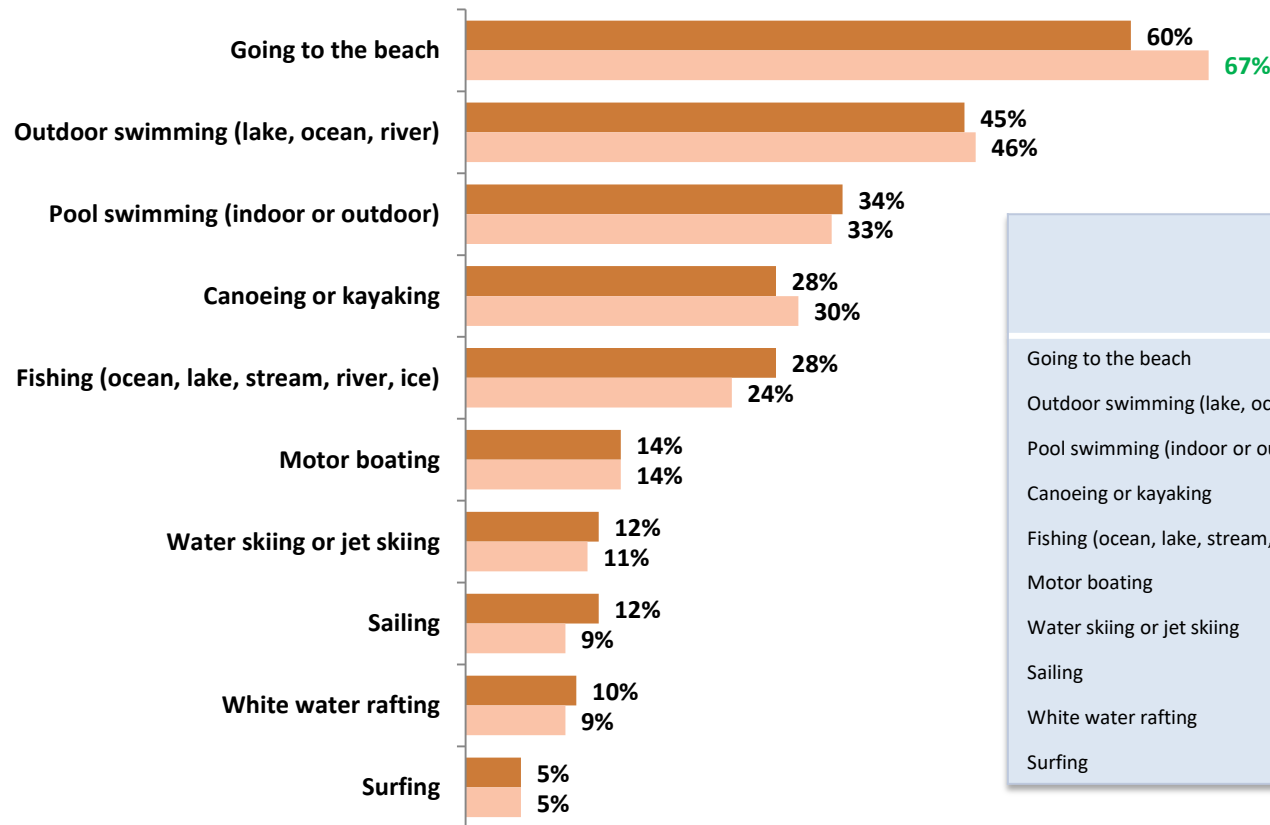
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Visiting historic sites/museums is the most prevalent activity among overnight visitors interested in history or culture.

- Among visitors interested in history or culture activities, those categorized as *Balanced Achievers* are more likely to have participated in several of these activities.

History or Culture Activities

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

■ 2016 (n=868) ■ 2017 (n=786)

Activity	2016	2017
Visiting historic sites or museums	63%	61%
Visiting art museums or local artisan exhibits	37%	41%
Getting to know the local people and/or culture	33%	38%
Participating in nightlife or other evening entertainment	22%	22%
Attending popular music concerts or events	12%	15%
Attending plays, musicals, or theatrical events	15%	13%
Painting, drawing, or sketching	12%	10%
Attending sports events	10%	9%
Attending operas or classical music events	6%	6%

	Balanced Achievers (n=343) a	Genuine Originals (n=277) B	Social Soph. (n=45)* c
Visiting historic sites or museums	57%	70% a	64%
Visiting art museums or local artisan exhibits	42%	43%	44%
Getting to know the local people and/or culture	36%	43%	38%
Participating in nightlife or other evening entertainment	27% b	18%	16%
Attending popular music concerts or events	21% bc	10%	4%
Attending plays, musicals, or theatrical events	20% bc	7%	4%
Painting, drawing, or sketching	14% bc	8%	2%
Attending sports events	17% b	1%	8%
Attending operas or classical music events	11% bc	2%	3%

Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
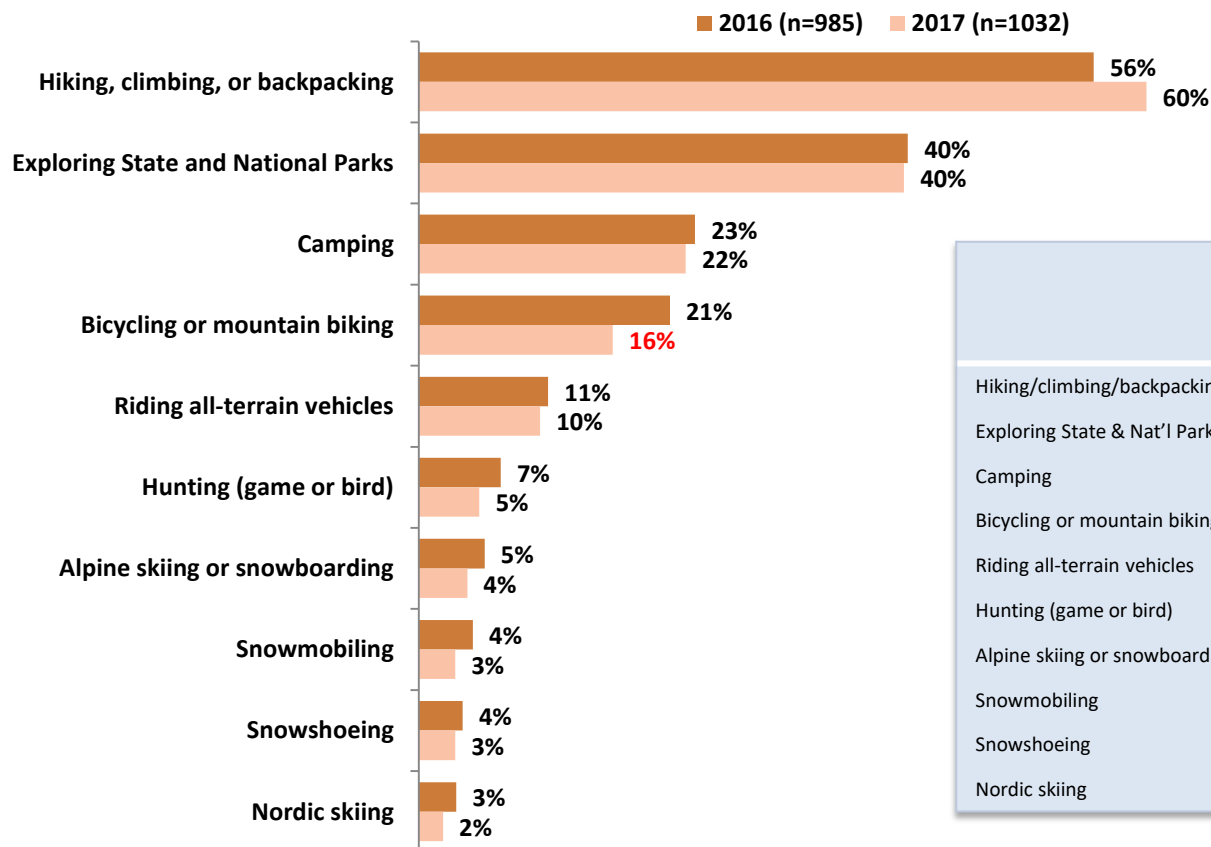Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- *Outlet* shopping is most popular among out-of-state visitors, especially those from New England.
- In-state visitors are more likely than out-of-state visitors to do some *general shopping at malls or downtown*.

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

■ 2016 (n=1485) ■ 2017 (n=1464)

Activity	2016	2017
Outlet shopping	54%	52%
General shopping at malls, downtown	47%	43%
Shopping for gifts or souvenirs	40%	42%
Shopping for unique, locally produced goods	32%	32%
Shopping for antiques, local arts and crafts	26%	22%
Shopping for products with the 'Made in Maine' identifier	24%	24%

	Maine (n=163) a	New England (n=705) b	Mid-Atlantic (n=401) c	Canada (n=195) d
Outlet shopping	37%	58% acd	48% a	50% a
General shopping at malls, downtown	63% bcd	39%	37%	52% bc
Shopping for gifts or souvenirs	30%	39% a	52% abd	39%
Shopping for unique, locally produced goods	28%	33% d	37% d	24%
Shopping for antiques, local arts and crafts	22%	21% d	26% d	14%
Shopping for products with the 'Made in Maine' identifier	29% d	22% d	30% bd	15%

Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
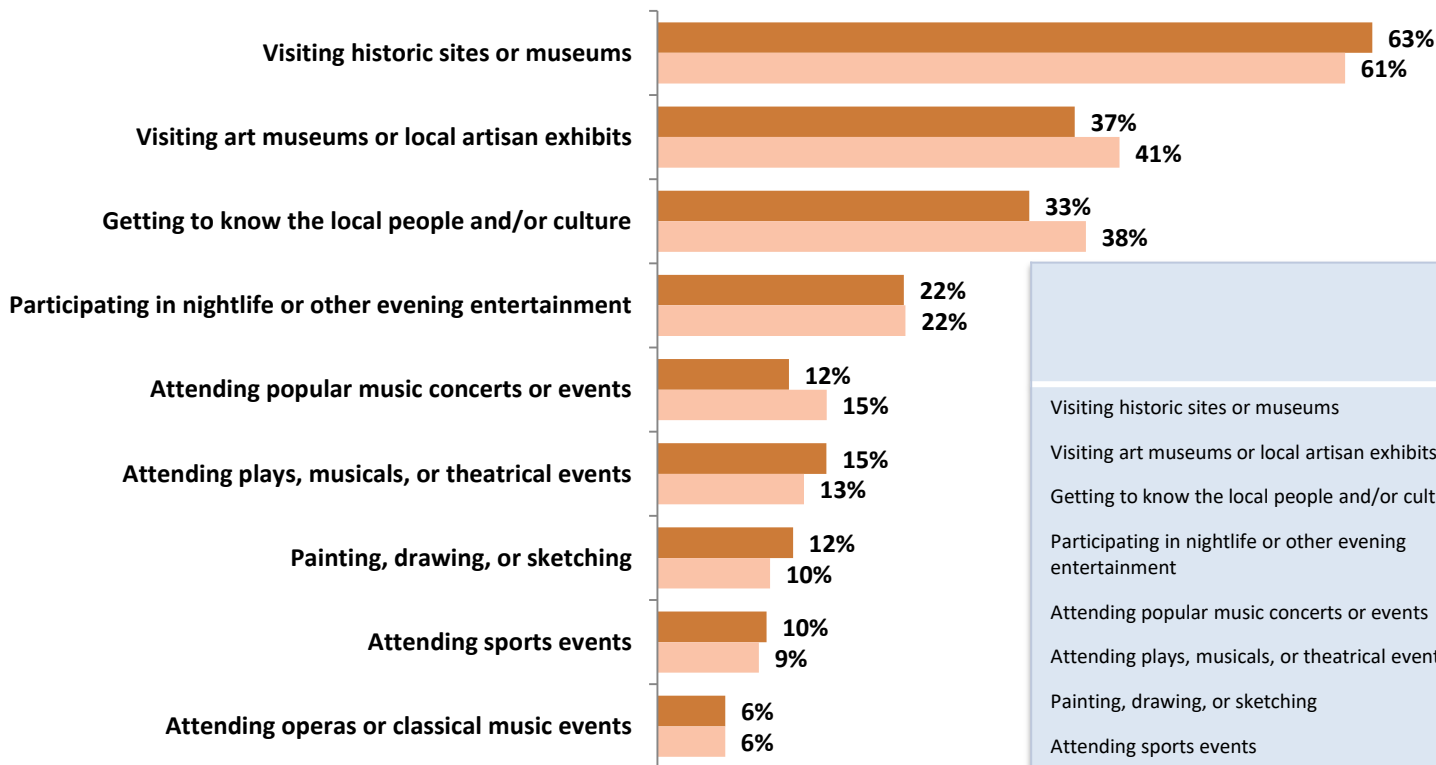
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65

Visiting *outdoor fun centers* is the most popular activity among those visitors interested in family fun/children's activities.
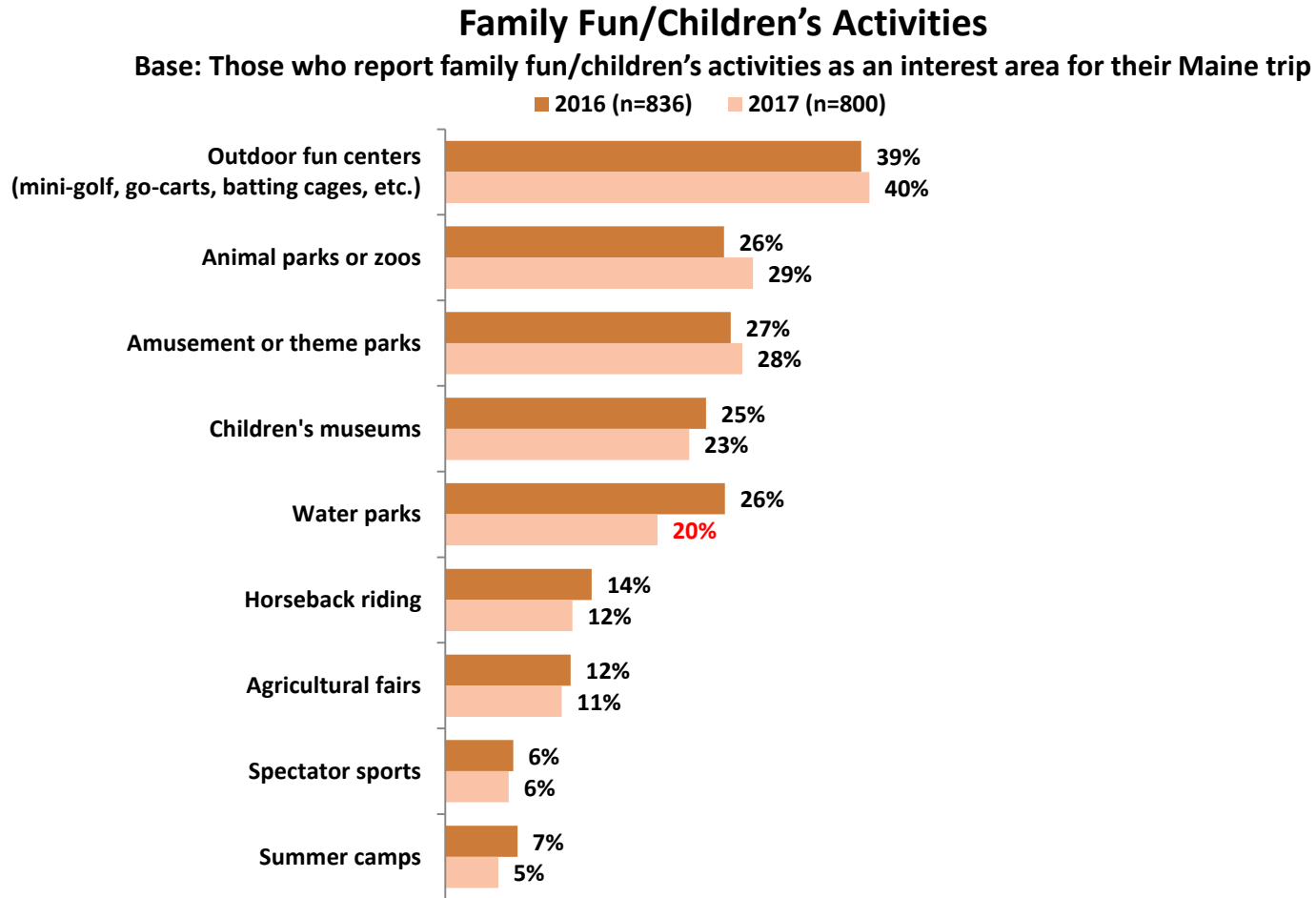
Family Fun/Children's Activities

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

■ 2016 (n=836) ■ 2017 (n=800)

Activity	2016	2017
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	39%	40%
Animal parks or zoos	26%	29%
Amusement or theme parks	27%	28%
Children's museums	25%	23%
Water parks	26%	20%
Horseback riding	14%	12%
Agricultural fairs	12%	11%
Spectator sports	6%	6%
Summer camps	7%	5%

Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
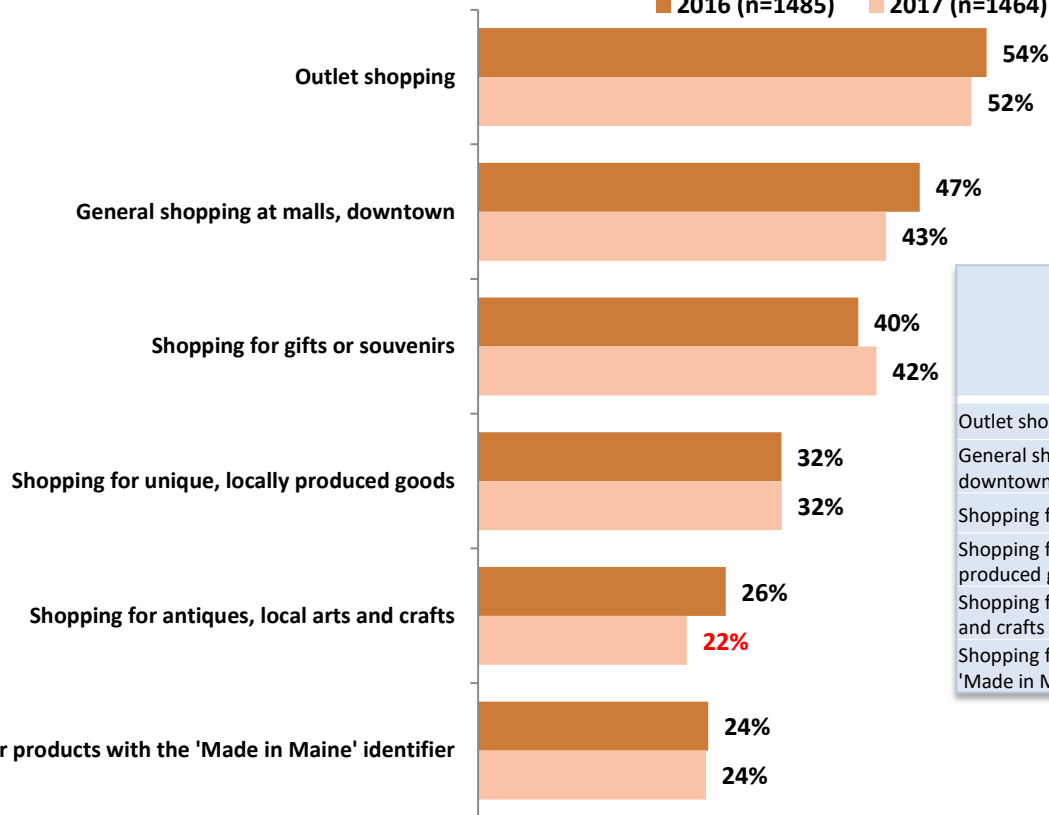
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Overnight Visitor Evaluations

Two-thirds of overnight visitors report that Maine exceeded their expectations for *overall experience.*

- After *overall experience,* visitor expectations were most exceeded for the *friendliness of Maine's people.*

- Visitors in 2017 are less likely than their counterparts a year earlier to say that Maine exceeded their expectations in each of these areas. This is likely related to a dramatic increase in travelers from Maine over the past year. Mainers are more likely than others to select "not applicable" when asked to evaluate these areas of Maine's performance, possibly because they are already familiar with the state and know what it has to offer as a vacation destination. So more travelers from Maine means more visitors provided a rating of "not applicable," reducing the overall share who say that Maine exceeded their expectations in these areas.

> **Traveler groups more likely to report that Maine exceeded their expectations on the majority of tested attributes:**
> - Balanced Achievers,
> - Americans,
> - Travelers staying in paid accommodations, and
> - Residents of Mid-Atlantic states.

Maine Far Exceeded/Somewhat Above My Expectations

■ Top 2 Box 2016 (n=2909) ■ Top 2 Box 2017 (n=2922)

Attribute	Top 2 Box 2016	Top 2 Box 2017
Overall experience	70%	66%
Friendliness of people	64%	60%
Welcoming locals who make visitors feel comfortable	60%	55%
Quality of dining	63%	54%
Overall quality of customer service	61%	54%
Distinctive, genuine, and unique experiences	58%	54%
Variety of activities available	57%	51%
Authentic communities with their own individual personalities	58%	50%
Overall value for the money	56%	50%
Great selection of family attractions and venues	52%	48%
Quality of lodging	55%	47%
Availability of family dining	55%	46%
Accessible, diverse, and abundant shopping choices	53%	46%
Availability of lodging	52%	46%
Availability of fine dining	51%	43%

Q41. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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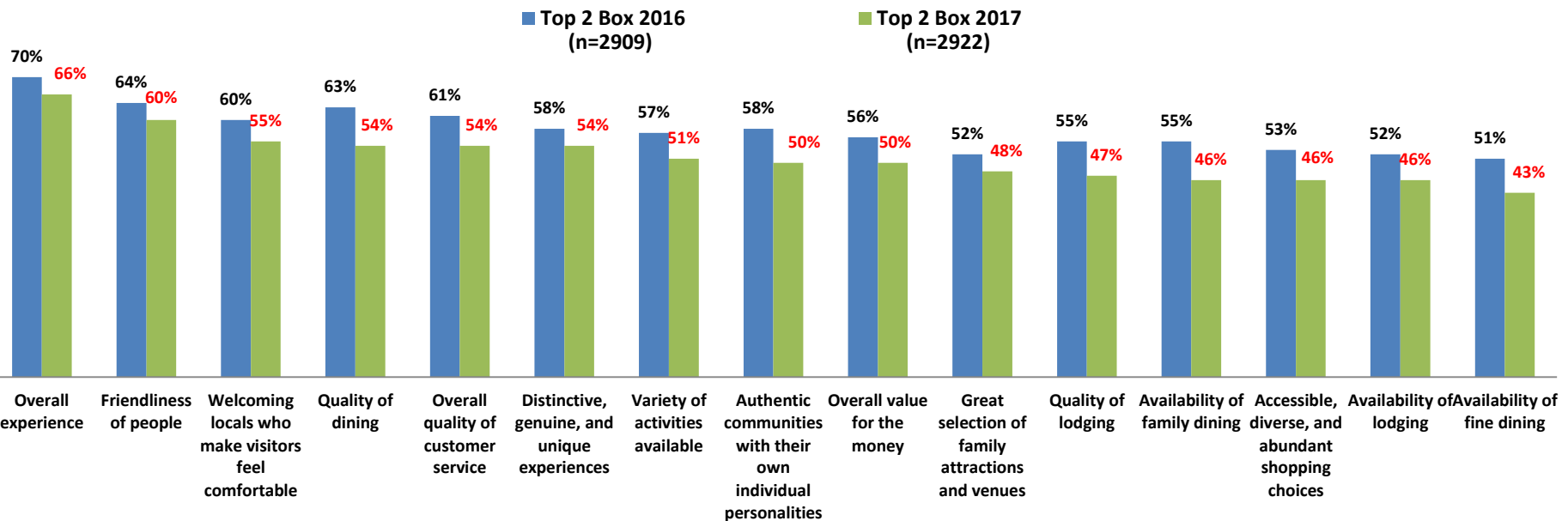
"Natural" and "Friendly" are still among the top words chosen to describe Maine's personality.

- *Natural* and *adventurous* were selected by a higher proportion of visitors in 2017 than in 2016, while *original* was selected by a <u>lower</u> proportion of visitors in 2017.

Words Describing Maine's Personality
(n=2922)

Word	%
Natural	63%
Friendly	58%
Fun	47%
Authentic	46%
Adventurous	46%
Family-oriented	45%
Genuine	44%
Real	39%
Unique	34%
Active	34%
Inspiring	31%
Sincere	30%
Original	29%
Vibrant	29%

Less Frequently Mentioned	
Old-fashioned	26%
Creative	23%
Open-minded	22%
Passionate	19%
Enthusiastic	19%
Imaginative	17%
Dynamic	14%
Quirky	13%
Offbeat	9%
Unexpected	7%
Reserved	7%
Unusual	5%
Unconventional	5%
Stodgy	1%
Uninspiring	1%
Unpleasant	1%
Boring	1%
Fake	1%

Q47. If Maine were a person, which of the following words would you choose to describe its personality?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day Visitor Travel Logistics

Similar to overnight visitors, the typical day visitor to Maine travels in groups of three, and one-third bring children.

- Day visitors traveling in Maine during the winter months are the least likely to be traveling with children.

- Visitors categorized as *Balanced Achievers* are significantly more likely to be traveling with children than are those categorized as *Genuine Originals* or *Social Sophisticates.*
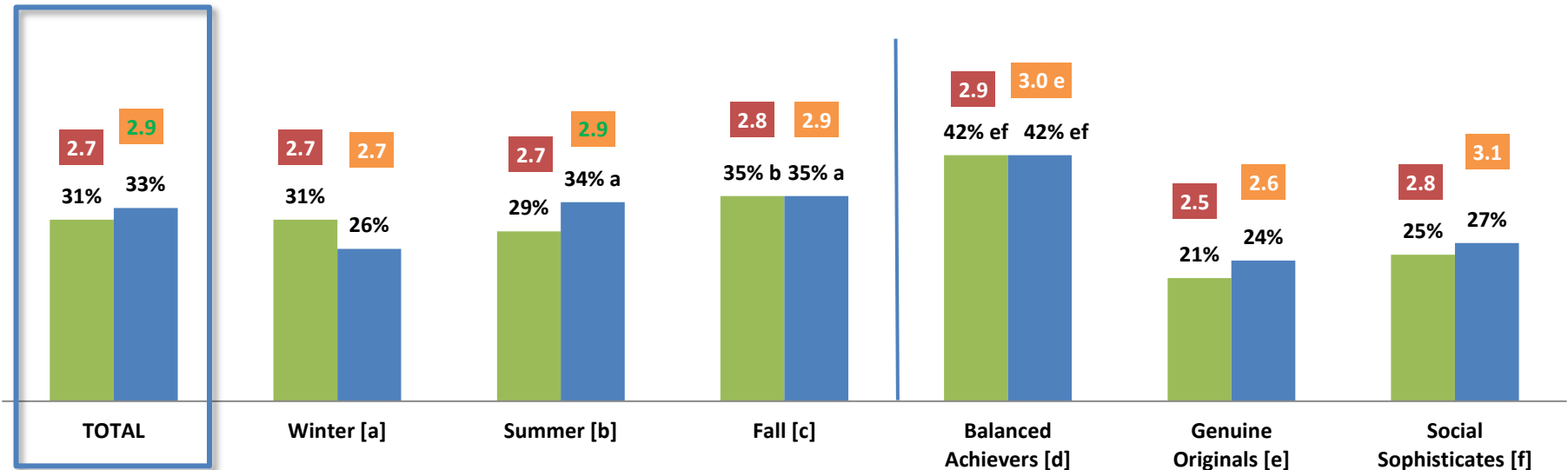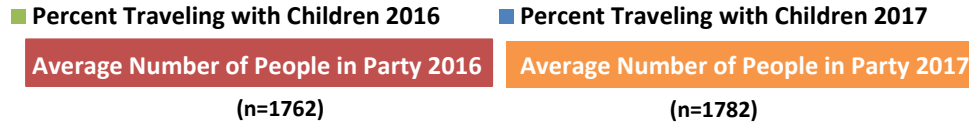
Average Travel Party Size 2017	
New England (n=1027)	Maine (n=572)
<3.1>	2.6

% Traveling with Children	
Americans (n=1599)	Canadians (n=183)
<34%>	26%

Travel Party Size and Composition

■ Percent Traveling with Children 2016   ■ Percent Traveling with Children 2017

Average Number of People in Party 2016   **Average Number of People in Party 2017**

(n=1762)   (n=1782)

	TOTAL	Winter [a]	Summer [b]	Fall [c]	Balanced Achievers [d]	Genuine Originals [e]	Social Sophisticates [f]
Avg People 2016	2.7	2.7	2.7	2.8	2.9	2.5	2.8
Avg People 2017	2.9	2.7	2.9	2.9	3.0 e	2.6	3.1
% Children 2016	31%	31%	29%	35% b	42% ef	21%	25%
% Children 2017	33%	26%	34% a	35% a	42% ef	24%	27%

Q15. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q16. How many of these people were: Children?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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The average party size among day visitors to Maine showed a slight increase in 2017, as compared to 2016.

Travel Party Size and Composition

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

2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
2.8	2.5	2.5	2.5	2.4	2.5	2.7	2.8	2.7	2.9
37%	26%	26%	22%	17%	22%	28%	29%	31%	33%

Q15. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
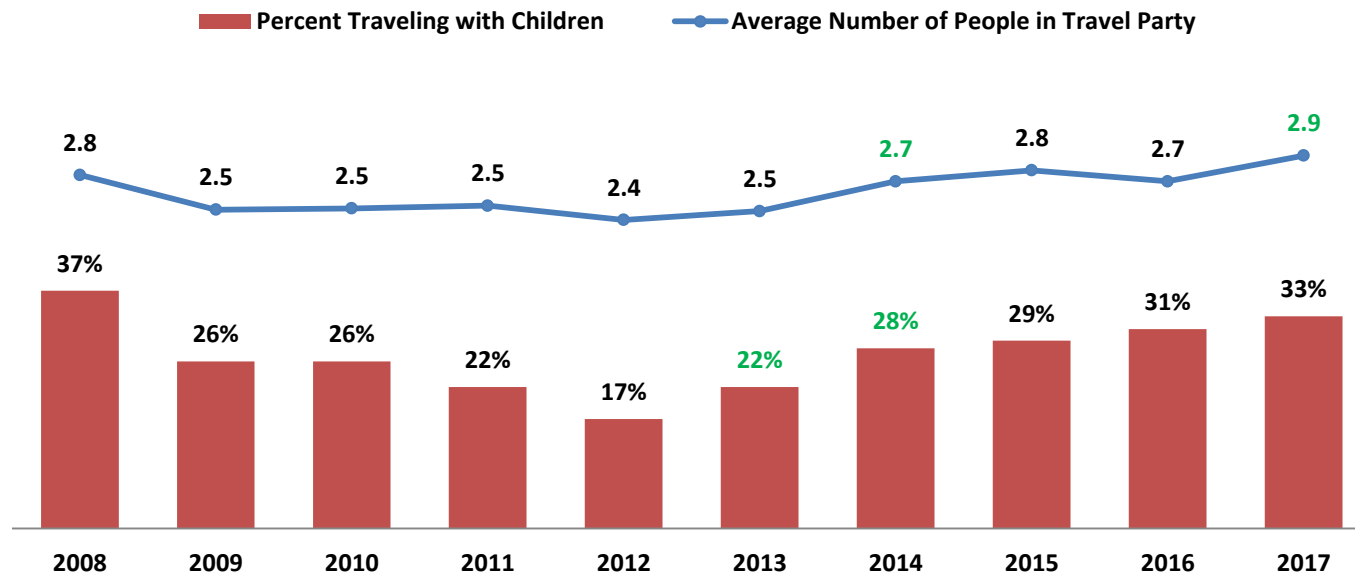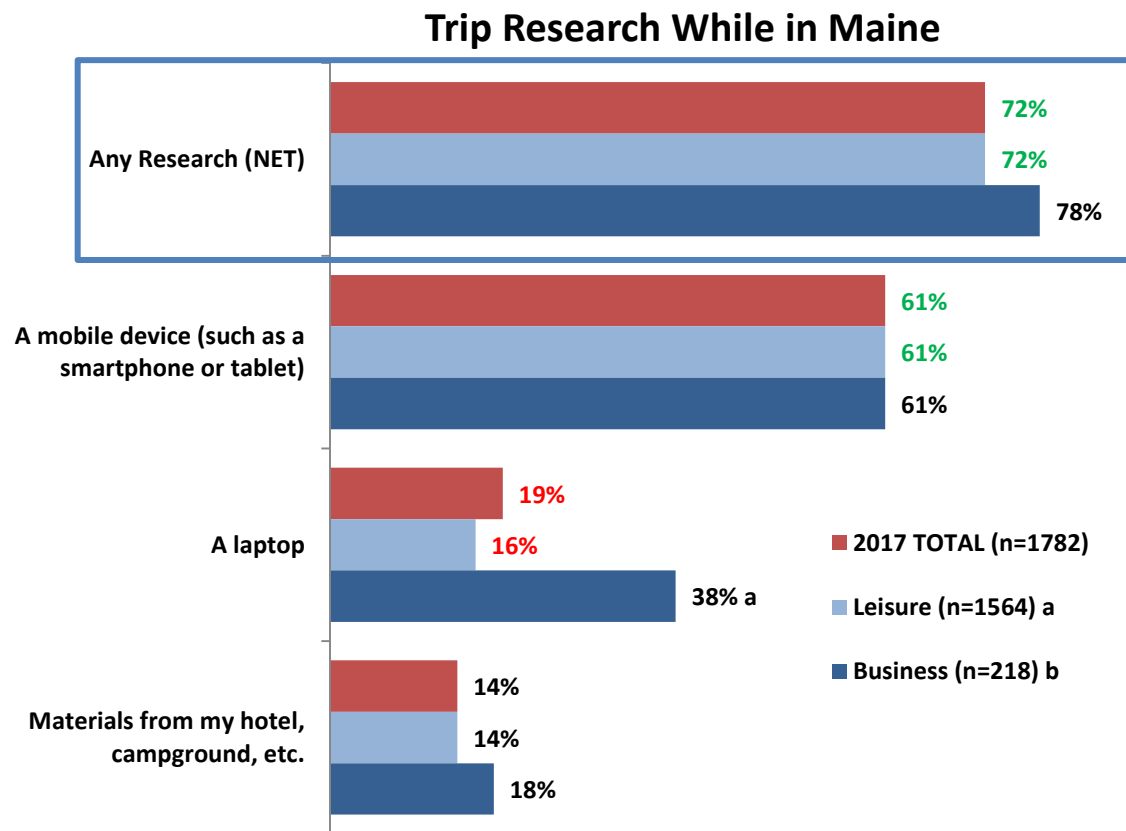Q16. How many of these people were: Children?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- The proportion of day visitors reporting that they continued to research Maine while on their day trip <u>increased</u> in 2017, as compared to 2016 (72% versus 67% in 2016).

- Several types of travelers are more apt than their counterparts to continue researching Maine while in the State, including *first-time visitors, younger travelers,* and *those traveling with children.*

Trip Research While in Maine

Any Research (NET)
- 2017 TOTAL: 72%
- Leisure: 72%
- Business: 78%

A mobile device (such as a smartphone or tablet)
- 2017 TOTAL: 61%
- Leisure: 61%
- Business: 61%

A laptop
- 2017 TOTAL: 19%
- Leisure: 16%
- Business: 38% a

Materials from my hotel, campground, etc.
- 2017 TOTAL: 14%
- Leisure: 14%
- Business: 18%

Legend:
- ■ 2017 TOTAL (n=1782)
- ■ Leisure (n=1564) a
- ■ Business (n=218) b

Several groups of day visitors are more likely than their counterparts to continue researching Maine while visiting the State.

First-Time Visitor	Repeat Visitor
<87%>	71%
<45 yrs	**45+ yrs**
<84%>	60%
Kids on Trip	**No Kids**
<81%>	68%

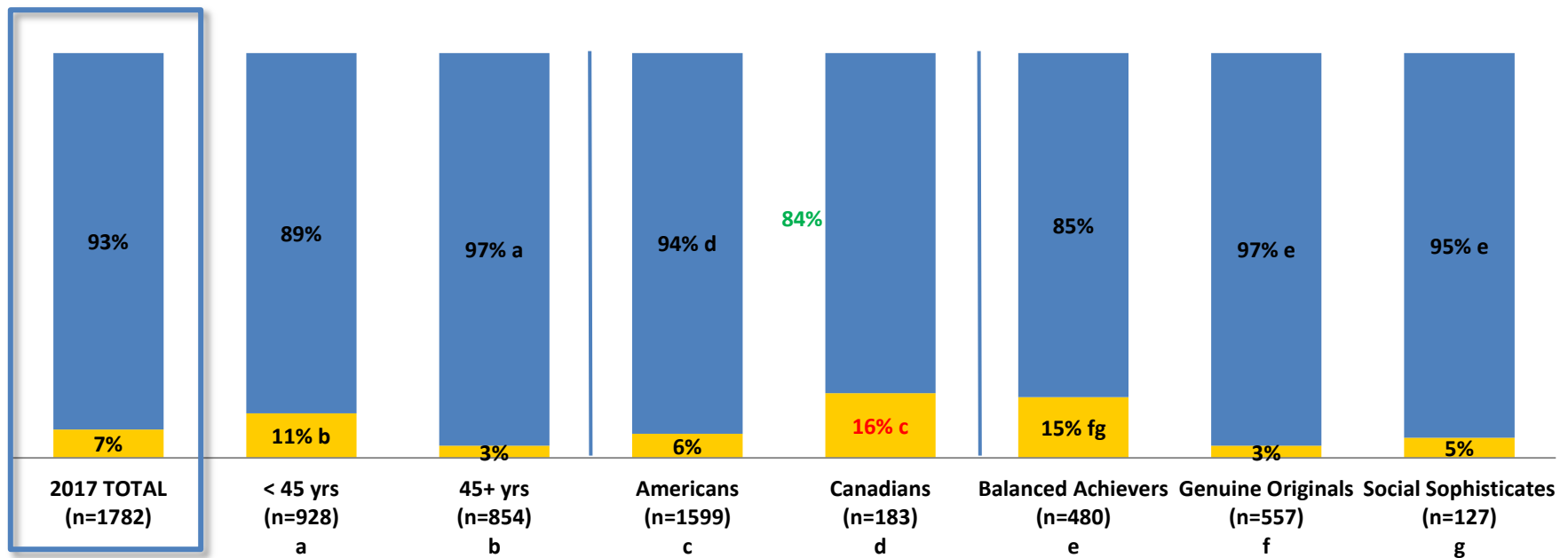Q25. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year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

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

- Canadian day visitors are more likely than domestic day visitors to be visiting Maine for the first time.
- Younger day visitors (<45 years old) and travelers categorized as *Balanced Achievers* are also more likely to be visiting Maine for the first time.

Repeat vs. First Time Visitors

■ Repeat Visitor
■ First Time Visitor

	2017 TOTAL (n=1782)	< 45 yrs (n=928) a	45+ yrs (n=854) b	Americans (n=1599) c	Canadians (n=183) d	Balanced Achievers (n=480) e	Genuine Originals (n=557) f	Social Sophisticates (n=127) g
Repeat Visitor	93%	89%	97% a	94% d	84%	85%	97% e	95% e
First Time Visitor	7%	11% b	3%	6%	16% c	15% fg	3%	5%

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

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

Repeat vs. First-Time Visitors Trend 2010 to 2017

96%	95%	94%	96%	95%	95%	93%	93%
4%	5%	6%	4%	5%	5%	7%	7%
2010	2011	2012	2013	2014	2015	2016	2017

■ Repeat Visitor
■ First-Time Visitor

Q10. Was this your first trip to Maine?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day Visitor Origin

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

- 2017 saw a year-over-year increase in the proportion of in-state day visitors (32% versus 26% in 2016), similar to what was seen among 2017 overnight visitors.

- Leisure day visitors are more likely to be residents of the New England states of Massachusetts, Rhode Island, and Vermont. Business day travelers are most likely to be residents of Maine.

State/Province of Residence

■ 2017 NET (n=1782)

	First-Time Visitor (n=131) [a]	Repeat Visitor (n=1651) [b]
U.S.	78%	91% a
Canada	22% b	9%

Bar chart:
- U.S. (NET): 90%
- Massachusetts: 37%
- Maine: 32%
- New Hampshire: 18%
- Rhode Island: 2%
- Vermont: 1%
- Canada (NET): 10%
- New Brunswick: 5%
- Quebec: 5%
- Nova Scotia: <1%

	2017 TOTAL (n=1782)	Leisure (n=1564) [a]	Business (n=218) [b]
U.S. (NET)	90%	90%	88%
Massachusetts	37%	38% b	25%
Maine	32%	30%	50% a
New Hampshire	18%	19%	14%
Rhode Island	2%	2% b	<1%
Vermont	1%	2% b	<1%
Canada (NET)	10%	10%	12%
New Brunswick	5%	5%	3%
Quebec	5%	4%	8%
Nova Scotia	<1%	<1%	1%

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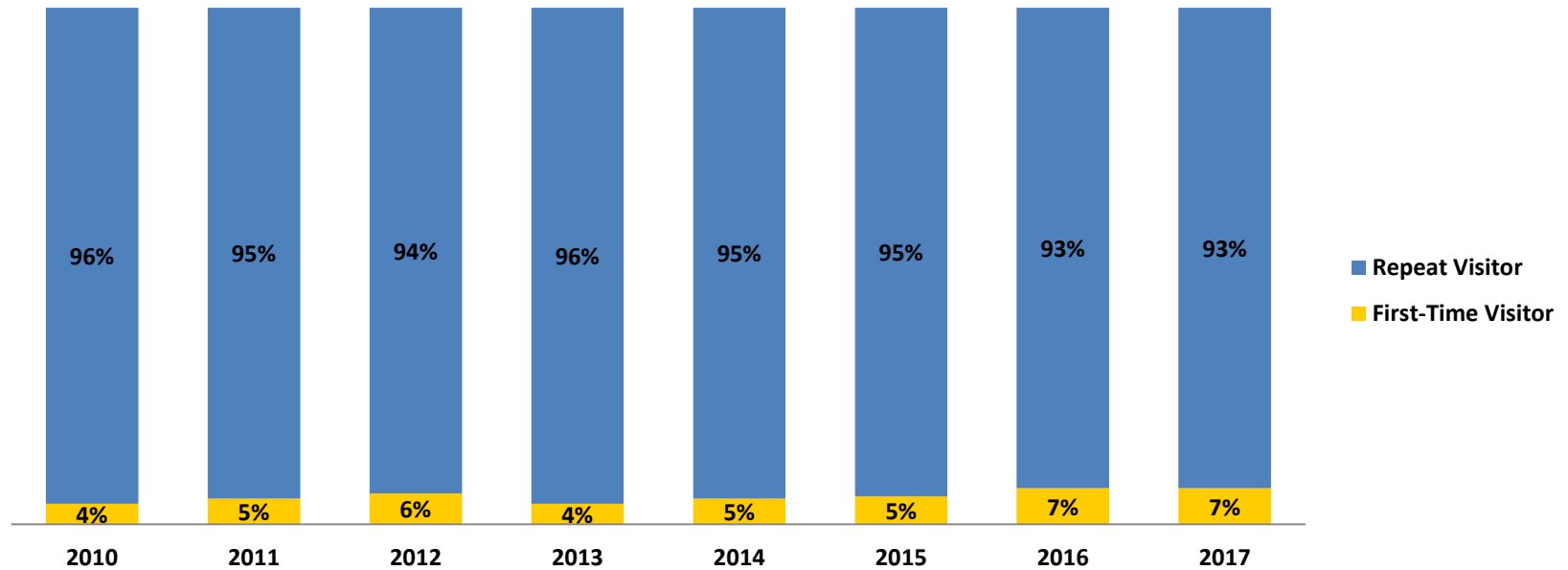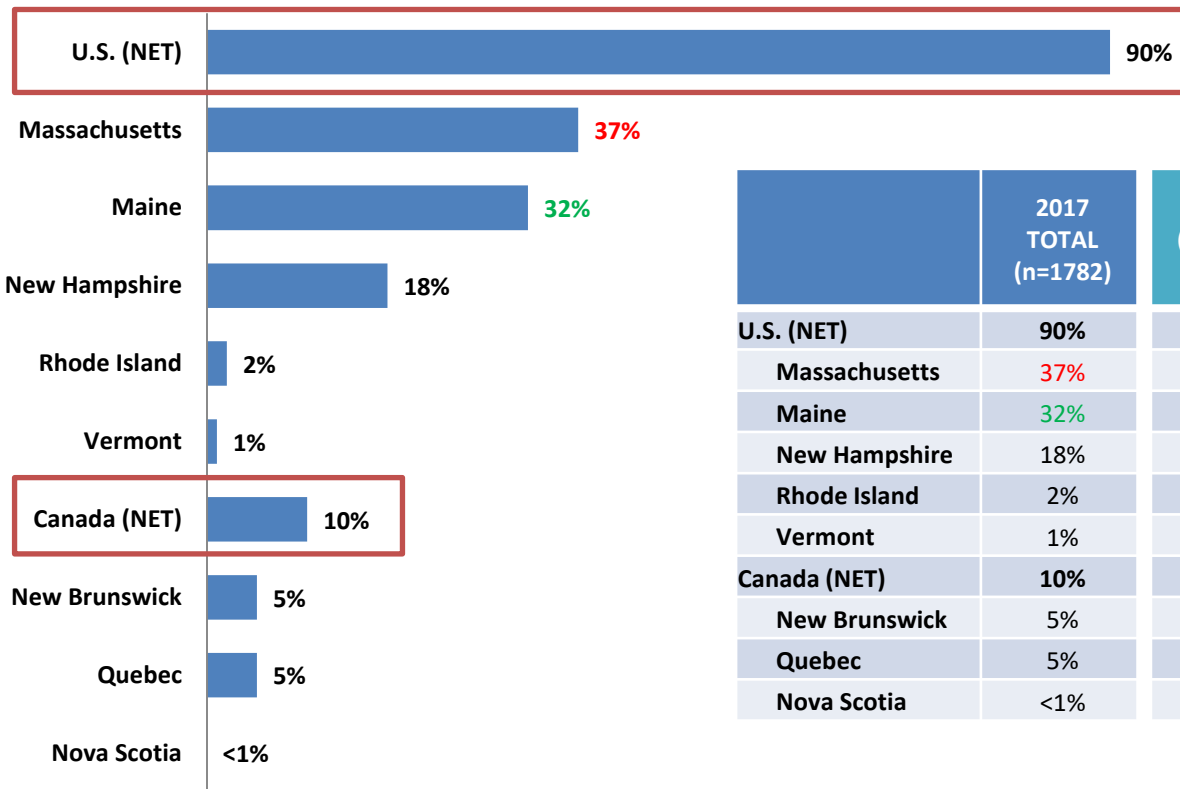<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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The proportion of in-state day visitors increased sharply between 2016 and 2017, while the share from Massachusetts declined.

Day Visitor Origin
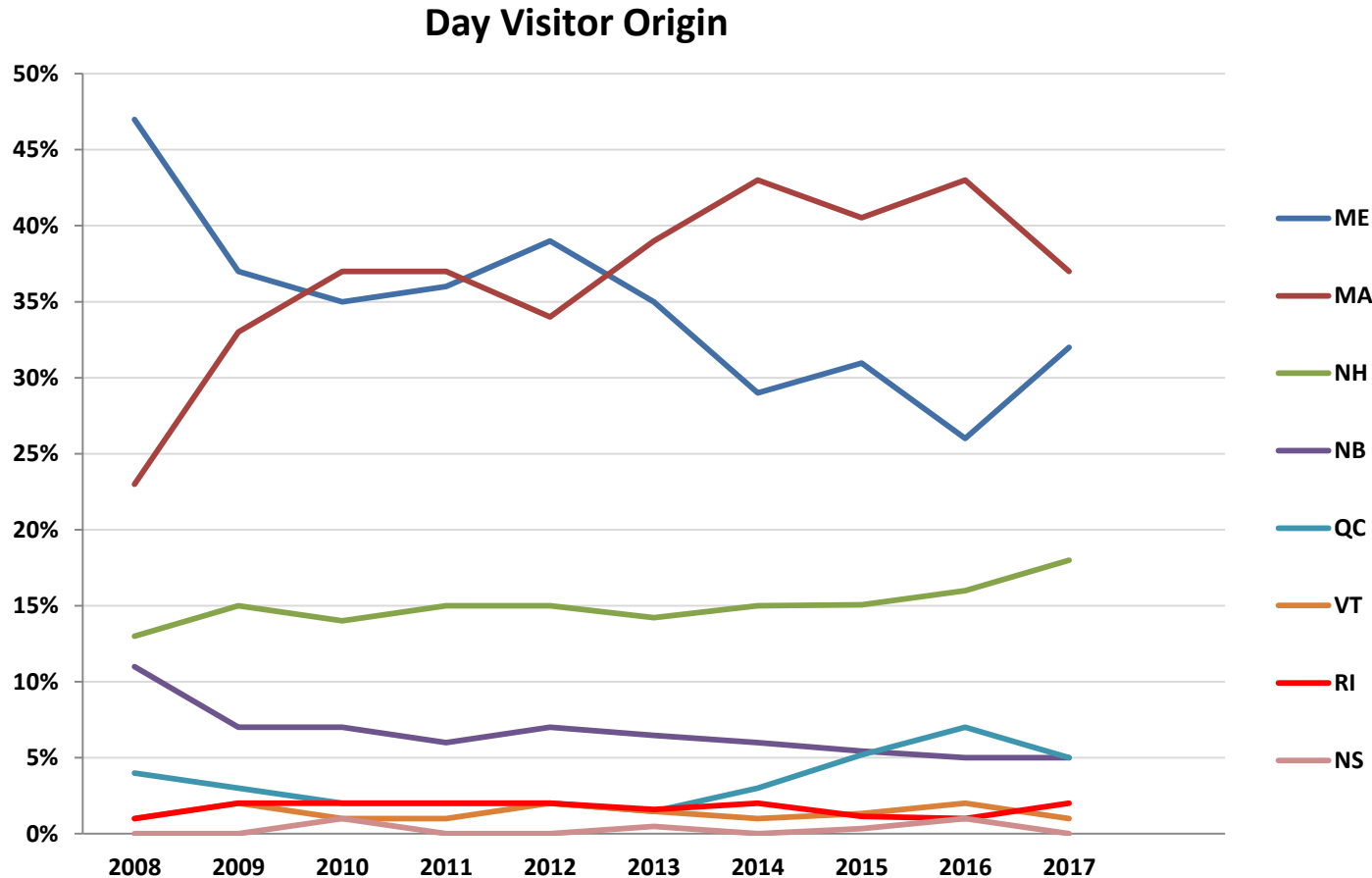
Q2. In which state or province do you live?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day Visitor Experience in Maine

Once again, day visitation centered around the Maine Beaches region in 2017.

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

Primary Region of Visit

Region	2016 (n=1762)	2017 (n=1782)
Maine Beaches	37%	35%
Greater Portland & Casco Bay	12%	13%
Downeast & Acadia	11%	13%
Mid-Coast	10%	10%
Maine Lakes & Mountains	9%	10%
The Maine Highlands	7%	8%
Kennebec Valley	8%	7%
Aroostook County	5%	4%

	Americans (n=1599) [a]	Canadians (n=183) [b]
Maine Beaches	36% b	25%
Greater Portland	14% b	4%
Mid-Coast	10% b	3%
Downeast/Acadia	11%	24% a
Lakes & Mtns	11% b	6%
Highlands	7%	18% a
Kennebec Valley	7% b	2%
Aroostook	2%	15% a

Q21. What region in Maine was your primary destination?
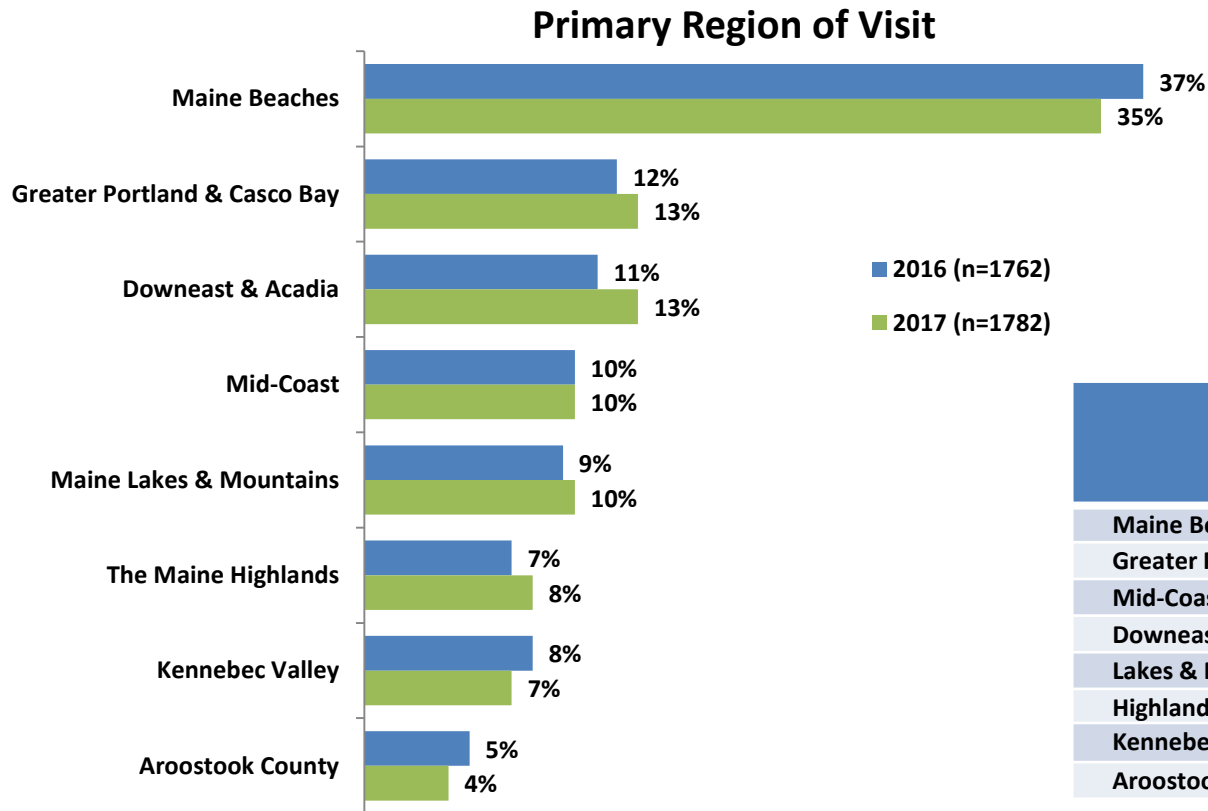<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Domestic visitors' primary regional destination is influenced by whether or not they live in Maine.

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

- First-time day visitors are more apt than repeat visitors to be seen in the *Lakes & Mountains* region, while repeat visitors are more likely to visit the *Greater Portland* region.

Primary Region by U.S. Residence

Region	2017 TOTAL (n=1782)	Maine (n=572)	New England (n=1027)
Maine Beaches	35%	12%	<49%>
Greater Portland & Casco Bay	13%	13%	14%
Downeast & Acadia	13%	<16%>	8%
Maine Lakes & Mountains	10%	11%	11%
Mid-Coast	10%	<18%>	7%
The Maine Highlands	8%	<11%>	4%
Kennebec Valley	7%	<13%>	4%
Aroostook County	4%	4%	1%

	First-Time Visitors (n=131) [a]	Repeat Visitors (n=1651) [b]
Greater Portland	6%	13% a
Lakes & Mountains	21% b	10%

	Balanced Achievers (n=480) [a]	Genuine Originals (n=557) [b]	Social Sophisticates (n=127) [c]
Maine Beaches	33%	34%	49% ab
Lakes & Mountains	14% c	11% c	4%

Q21. What region in Maine was your primary destination?
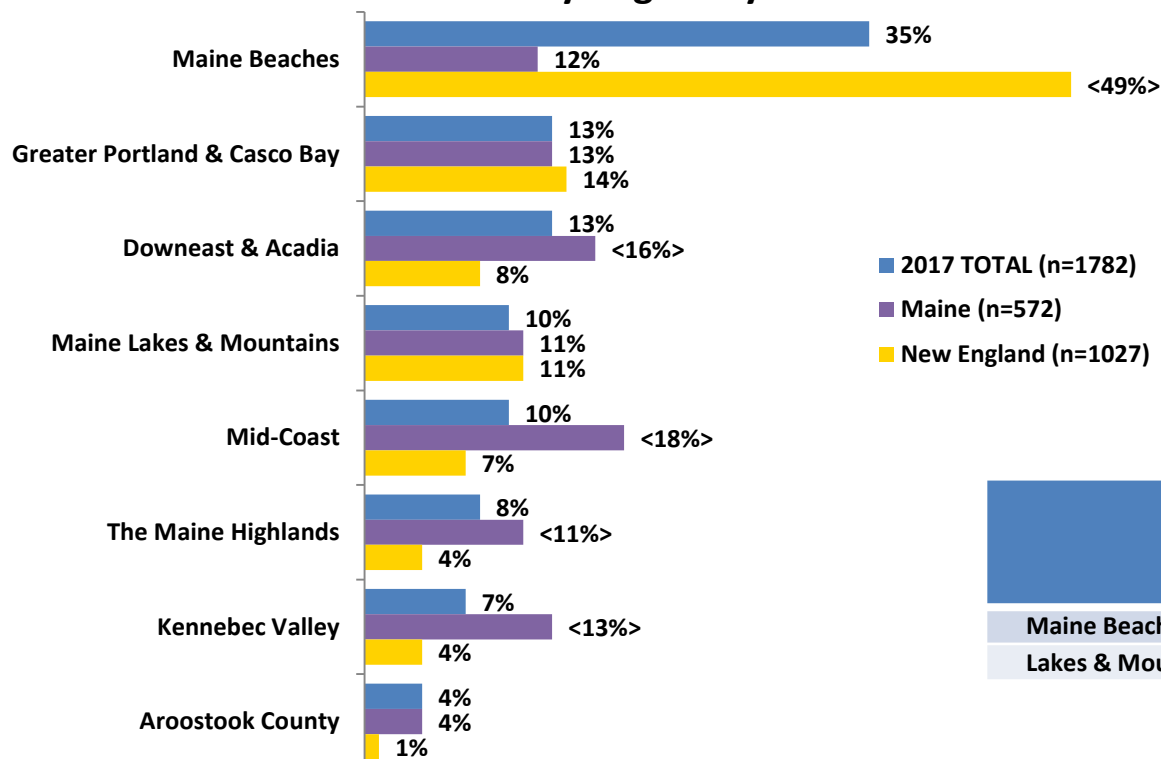<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day visitors show overwhelming intent to recommend the primary region they visited to friends/relatives.
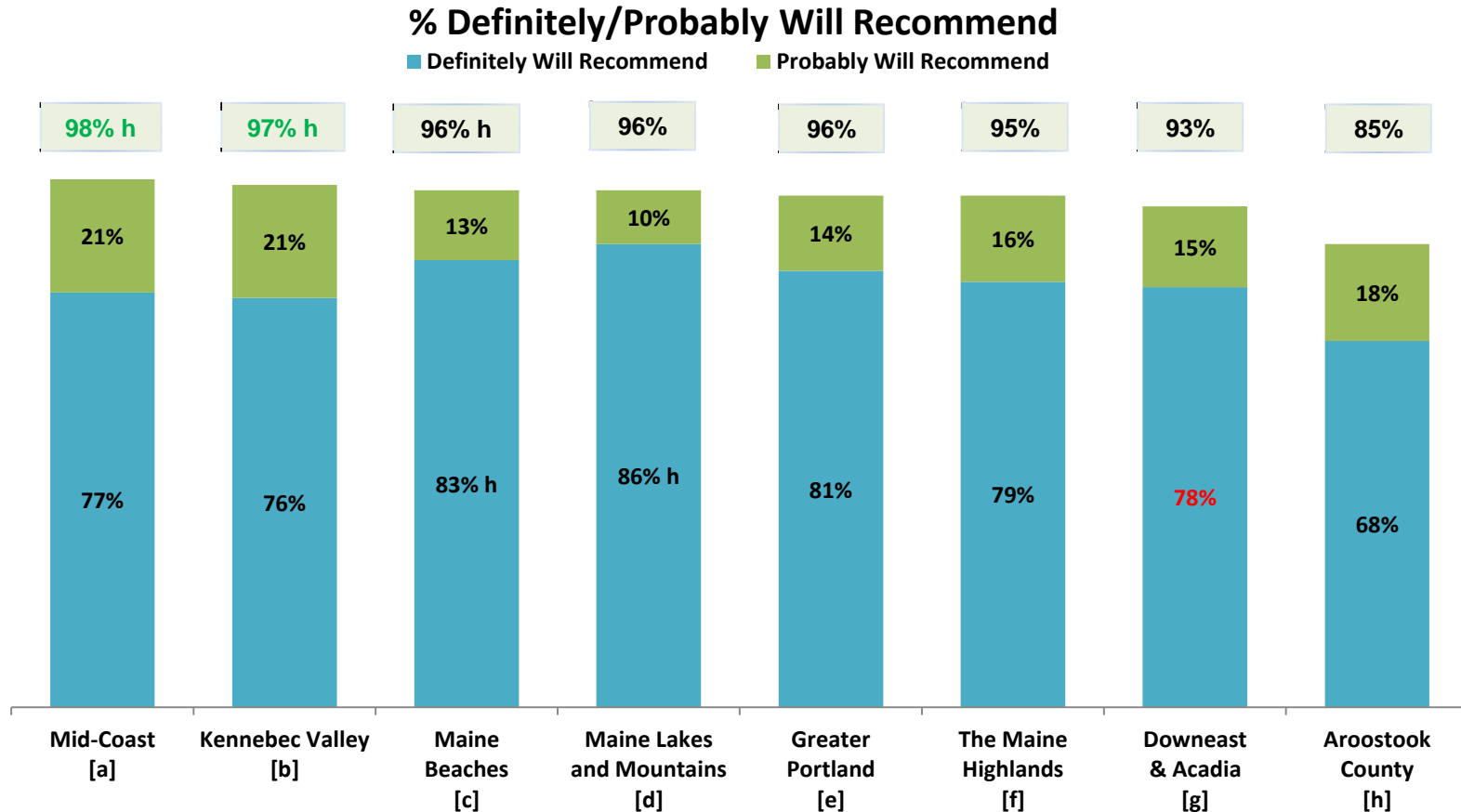
% Definitely/Probably Will Recommend

■ Definitely Will Recommend   ■ Probably Will Recommend

Region	Definitely Will Recommend	Probably Will Recommend	Total
Mid-Coast [a]	77%	21%	98% h
Kennebec Valley [b]	76%	21%	97% h
Maine Beaches [c]	83% h	13%	96% h
Maine Lakes and Mountains [d]	86% h	10%	96%
Greater Portland [e]	81%	14%	96%
The Maine Highlands [f]	79%	16%	95%
Downeast & Acadia [g]	78%	15%	93%
Aroostook County [h]	68%	18%	85%

Q22. How likely will you be to recommend the [primary region visited] region to friends or relatives?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
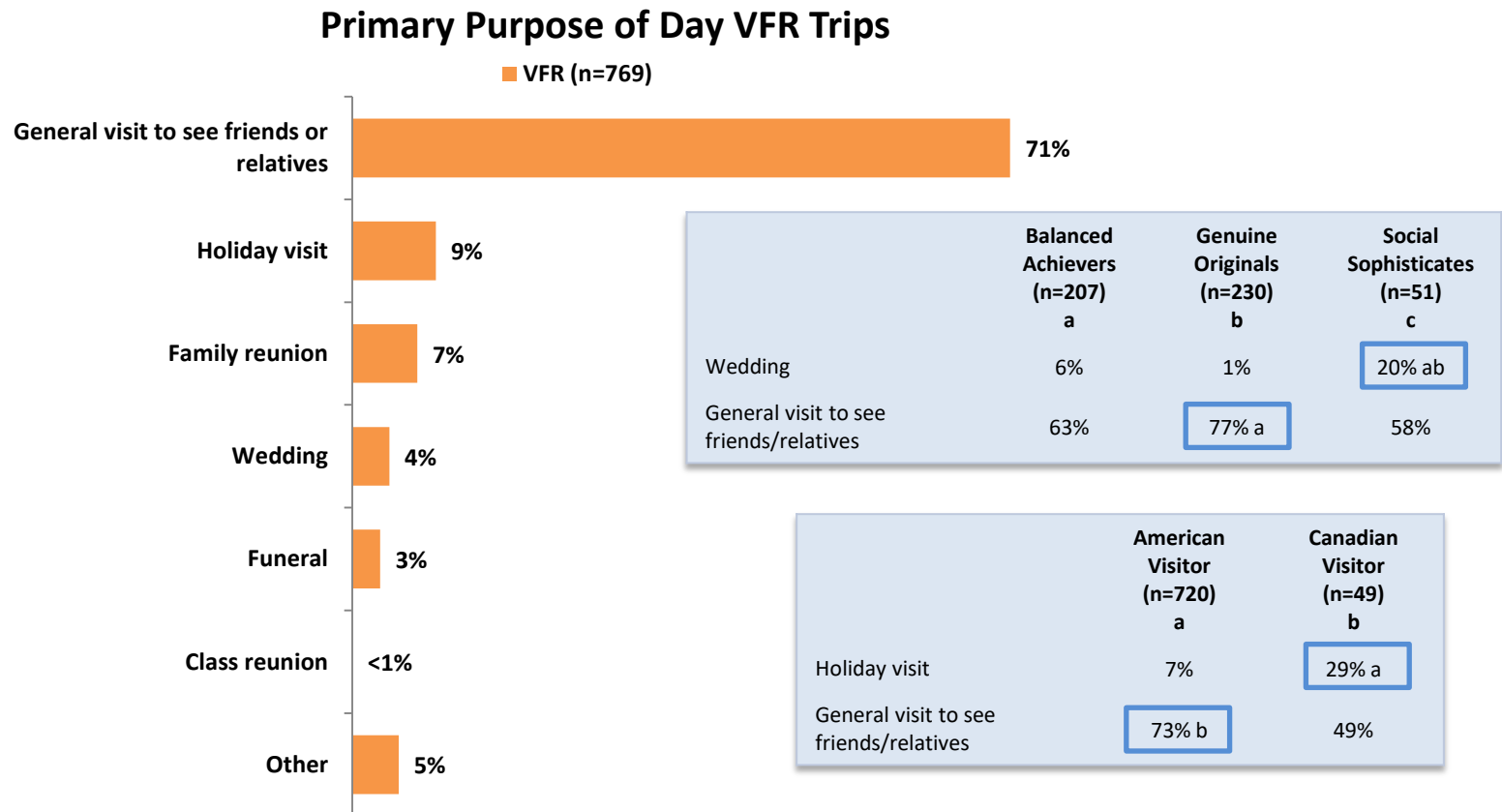
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Day Visitor
Interest Areas and Activities

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

- Day visitors categorized as *Social Sophisticates* are more likely to be in Maine to attend a <u>wedding</u>, as compared to visitors categorized as *Balanced Achievers* or *Genuine Originals*.

Primary Purpose of Day VFR Trips

VFR (n=769)

Purpose	Percent
General visit to see friends or relatives	71%
Holiday visit	9%
Family reunion	7%
Wedding	4%
Funeral	3%
Class reunion	<1%
Other	5%

	Balanced Achievers (n=207) a	Genuine Originals (n=230) b	Social Sophisticates (n=51) c
Wedding	6%	1%	20% ab
General visit to see friends/relatives	63%	77% a	58%

	American Visitor (n=720) a	Canadian Visitor (n=49) b
Holiday visit	7%	29% a
General visit to see friends/relatives	73% b	49%

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

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

Primary Purpose of Day Business Trips

■ Business (n=218)

Purpose	Percentage
Meeting	33%
Training or Professional Development	22%
Sales or Service	19%
Convention, Conference, or Trade Show	13%
Other	13%
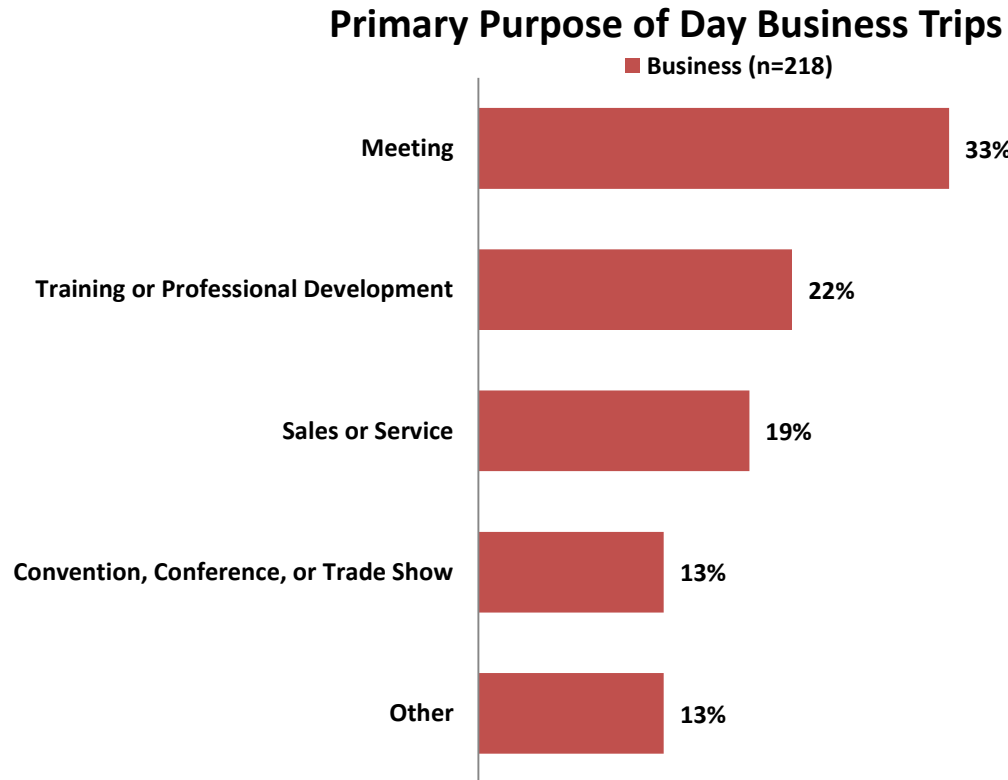
Q8. What was the primary purpose of your most recent business day trip in Maine?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Food/beverage/culinary activities and *shopping* are the most popular interest areas of day visitors.
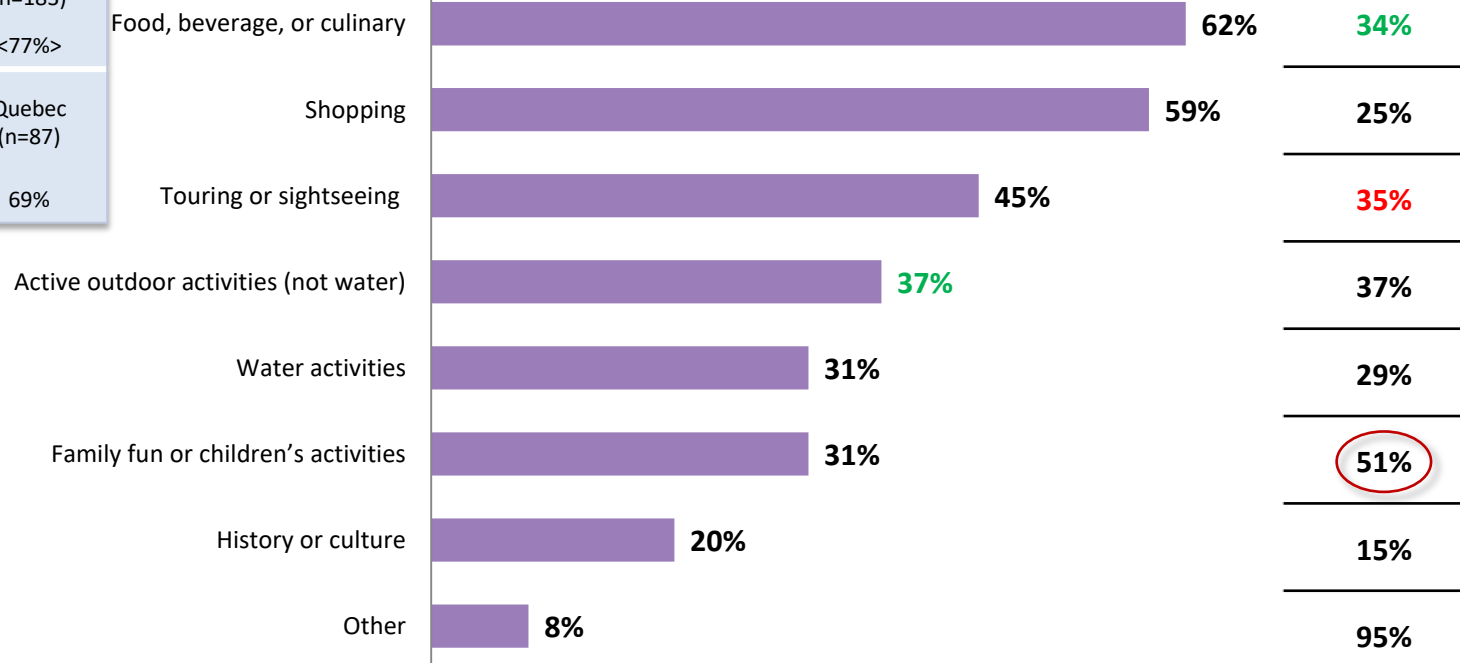
- Among all seven interest areas specified in the survey, *family fun/children's activities* are the most likely to be considered the <u>most important</u> interest in their decision to come to Maine.

Shopping Interest 2017	
American Visitor (n=1599)	Canadian Visitor (n=183)
57%	<77%>
Maritime Provinces (n=96)	Quebec (n=87)
<84%>	69%

2017 Interest Areas
(n=1782)

Most Important Interest Area

Interest Area	2017 Interest	Most Important
Food, beverage, or culinary	62%	**34%**
Shopping	59%	25%
Touring or sightseeing	45%	**35%**
Active outdoor activities (not water)	37%	37%
Water activities	31%	29%
Family fun or children's activities	31%	51%
History or culture	20%	15%
Other	8%	95%

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the <u>most important</u>.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Food/beverage/culinary activities rank highest when interest and importance are analyzed in combination.

- When viewing 2017 interest areas in terms of the Importance Index, *touring/sightseeing* activities fall to second place behind *food/beverage/culinary* activities, switching relative rankings from 2016.

2017 Interest Areas
*Importance Index**

Interest Area	Value
Food, beverage, or culinary	21%
Touring or sightseeing	16%
Family fun or children's activities	16%
Shopping	15%
Active outdoor activities (not water)	14%
Water activities	9%
History or culture	3%
Other	8%

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

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
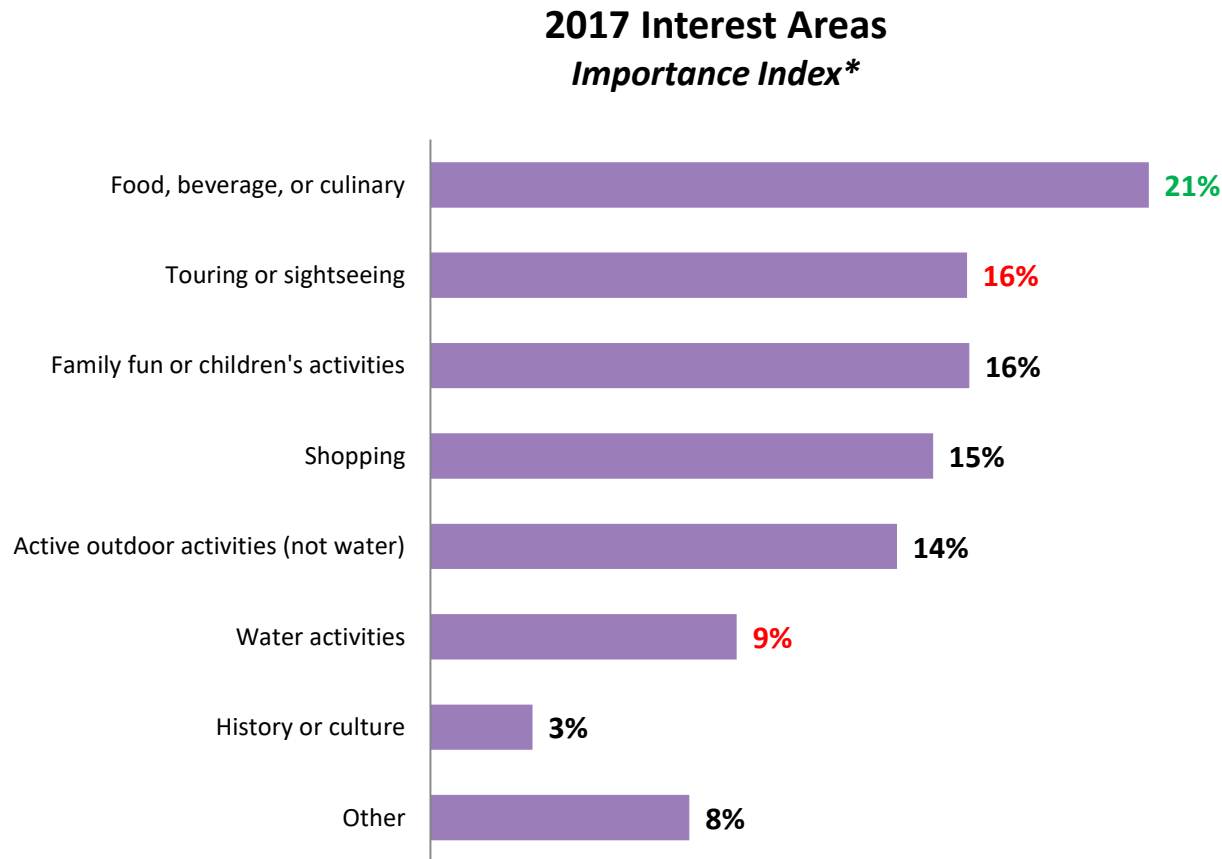Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day visitors' interest areas differ with residence, age, and visitor segment.

- Canadian day visitors are more likely than domestic visitors to list *shopping* as an interest area, while domestic visitors are more likely to list a wide variety of interest areas.
- Younger visitors (< 45 yrs) are also more likely than older visitors to list a variety of interests.
- *Balanced Achievers* are more likely to be interested in *family fun/children's activities* than are *Genuine Originals* and *Social Sophisticates*. *Genuine Originals* are the least likely to be interested in shopping.

Interest Area	2017 TOTAL (n=1782)	Residence		Age		Visitor Segment		
		United States (n=1599) a	Canada (n=183) b	<45 yrs (n=928) c	45+ yrs (n=854) d	Balanced Achievers (n=480) e	Genuine Originals (n=557) f	Social Sophisticates (n=127) g
Food, beverage, or culinary	62%	63% b	52%	66% d	57%	64%	62%	70%
Shopping	59%	57%	77% a	57%	61%	65% f	56%	70% f
Touring or sightseeing	45%	46% b	35%	49% d	41%	52%	48%	55%
Active outdoor activities (not water)	37%	39% b	22%	45% d	29%	42%	40%	33%
Water Activities	31%	31% b	23%	37% d	24%	35%	30%	37%
Family fun or children's activities	31%	32% b	20%	37% d	25%	40% fg	24%	25%
History or culture	20%	20%	19%	21%	19%	24%	25%	21%
Other	8%	7%	8%	3%	12% c	6%	9%	3%

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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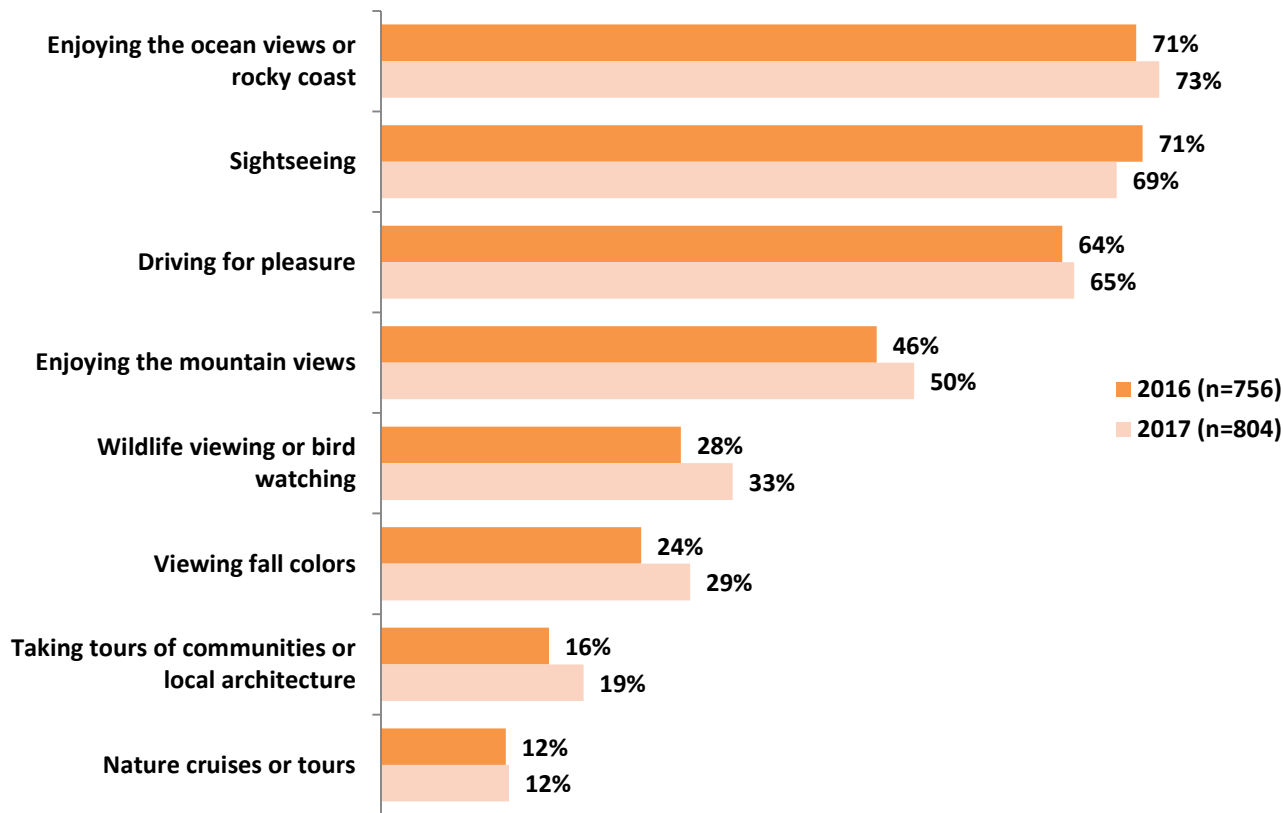providing direction in travel & tourism

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

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

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

Activity	2016 (n=756)	2017 (n=804)
Enjoying the ocean views or rocky coast	71%	73%
Sightseeing	71%	69%
Driving for pleasure	64%	65%
Enjoying the mountain views	46%	50%
Wildlife viewing or bird watching	28%	33%
Viewing fall colors	24%	29%
Taking tours of communities or local architecture	16%	19%
Nature cruises or tours	12%	12%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
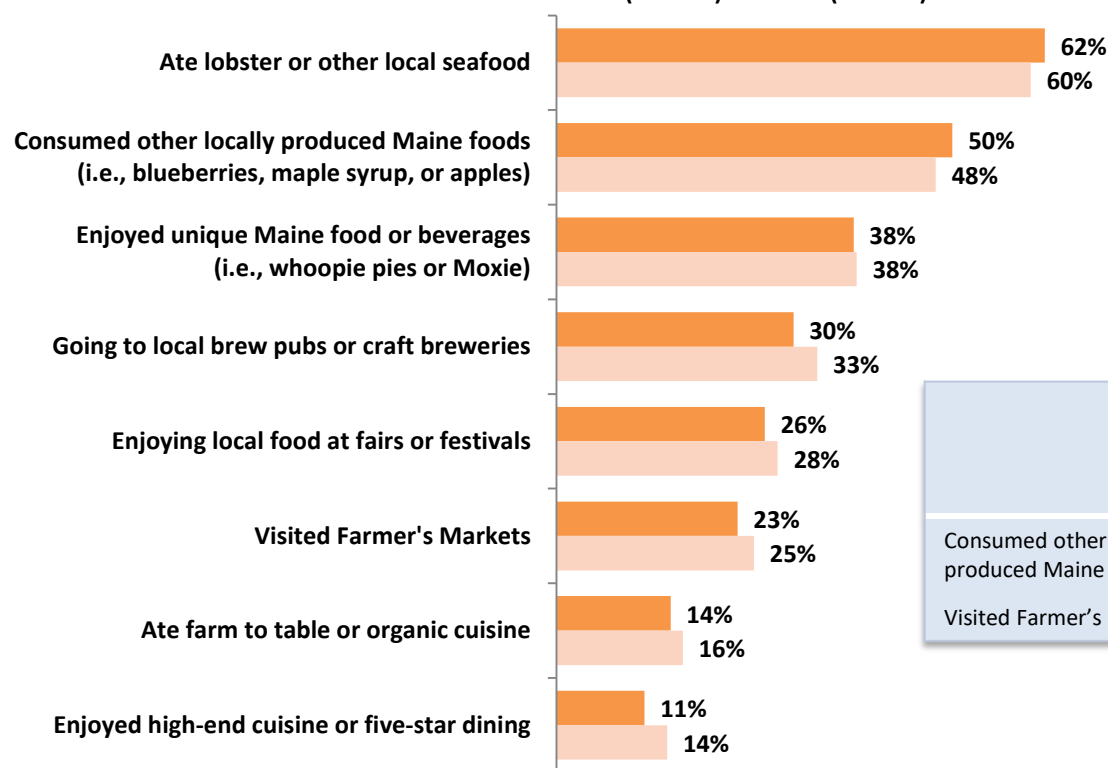
89

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

- Half of day visitors interested in food/beverage/culinary activities *consumed other locally produced Maine foods* while visiting.

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

■ 2016 (n=1039) ■ 2017 (n=1096)

Activity	2016	2017
Ate lobster or other local seafood	62%	60%
Consumed other locally produced Maine foods (i.e., blueberries, maple syrup, or apples)	50%	48%
Enjoyed unique Maine food or beverages (i.e., whoopie pies or Moxie)	38%	38%
Going to local brew pubs or craft breweries	30%	33%
Enjoying local food at fairs or festivals	26%	28%
Visited Farmer's Markets	23%	25%
Ate farm to table or organic cuisine	14%	16%
Enjoyed high-end cuisine or five-star dining	11%	14%

	Balanced Achievers (n=309) a	Genuine Originals (n=346) b	Social Sophisticates (n=89) c
Consumed other locally produced Maine foods	42%	57% a	59% a
Visited Farmer's Markets	34% bc	22%	19%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
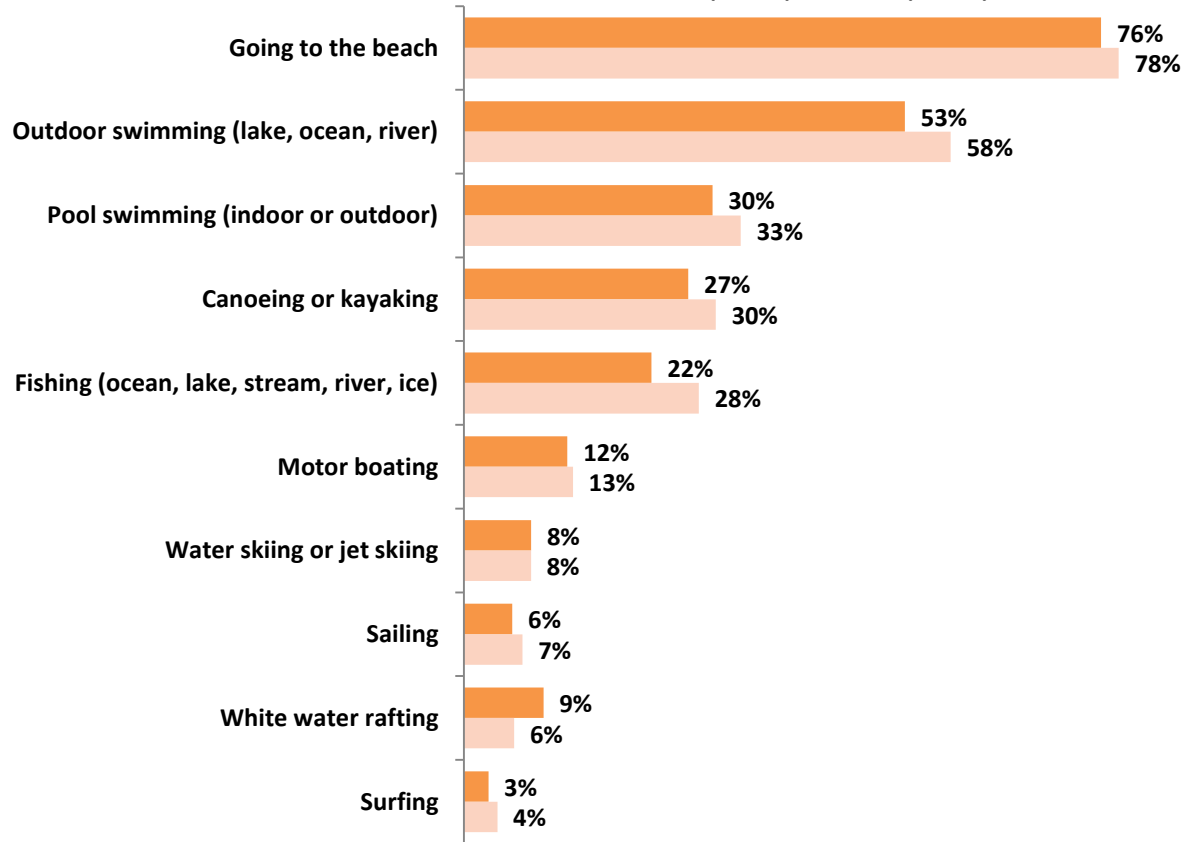Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Among day visitors interested in water activities, *going to the beach* is the most popular water-based vacation pursuit.

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

■ **2016 (n=596)**   ■ **2017 (n=544)**

Activity	2016	2017
Going to the beach	76%	78%
Outdoor swimming (lake, ocean, river)	53%	58%
Pool swimming (indoor or outdoor)	30%	33%
Canoeing or kayaking	27%	30%
Fishing (ocean, lake, stream, river, ice)	22%	28%
Motor boating	12%	13%
Water skiing or jet skiing	8%	8%
Sailing	6%	7%
White water rafting	9%	6%
Surfing	3%	4%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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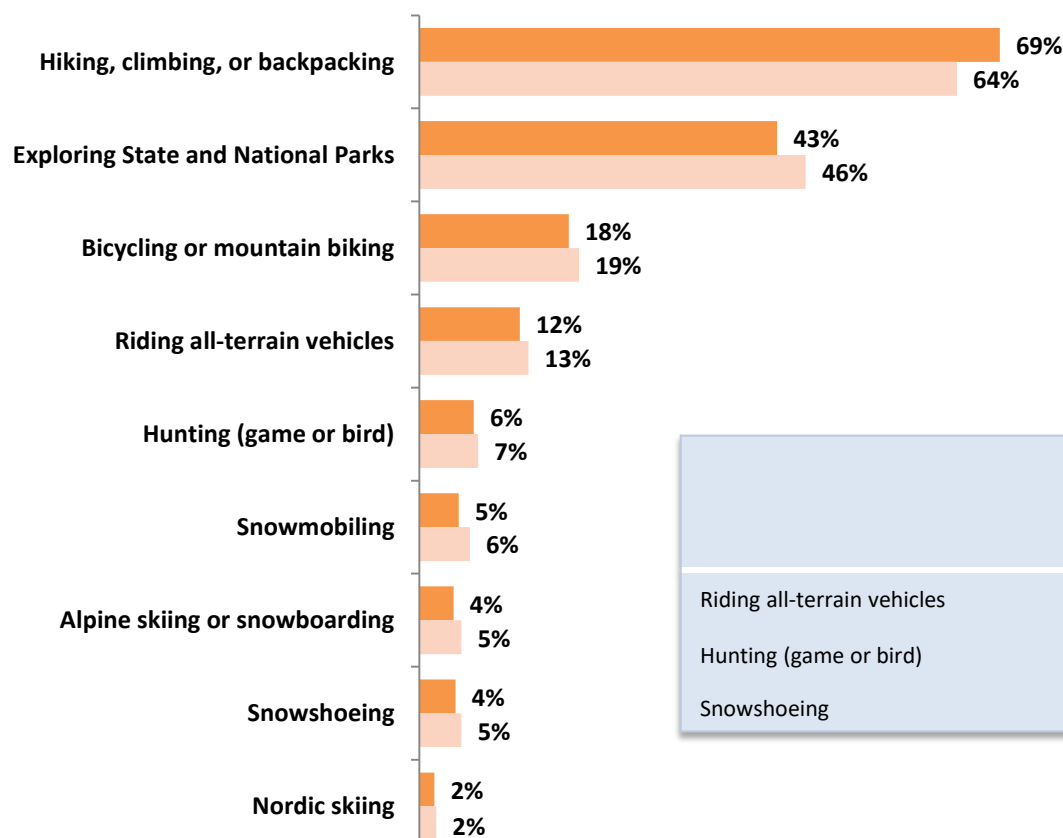providing direction
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The majority of day visitors interested in non-aquatic active outdoor activities engage in *hiking/climbing/backpacking* while in Maine.

- Nearly half of day visitors interested in non-aquatic outdoor activities *explore State and National Parks* while visiting Maine.
- Residents of Maine are more likely than out-of-state visitors to enjoy *riding all-terrain vehicles, hunting,* and *snowshoeing* while traveling in Maine.

Active Outdoor Activities (Non-Water)

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

■ 2016 (n=563) ■ 2017 (n=664)

Activity	2016	2017
Hiking, climbing, or backpacking	69%	64%
Exploring State and National Parks	43%	46%
Bicycling or mountain biking	18%	19%
Riding all-terrain vehicles	12%	13%
Hunting (game or bird)	6%	7%
Snowmobiling	5%	6%
Alpine skiing or snowboarding	4%	5%
Snowshoeing	4%	5%
Nordic skiing	2%	2%

	Maine Residents (n=220) a	Other New England States (n=404) b
Riding all-terrain vehicles	21% b	9%
Hunting (game or bird)	13% b	5%
Snowshoeing	10% b	2%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
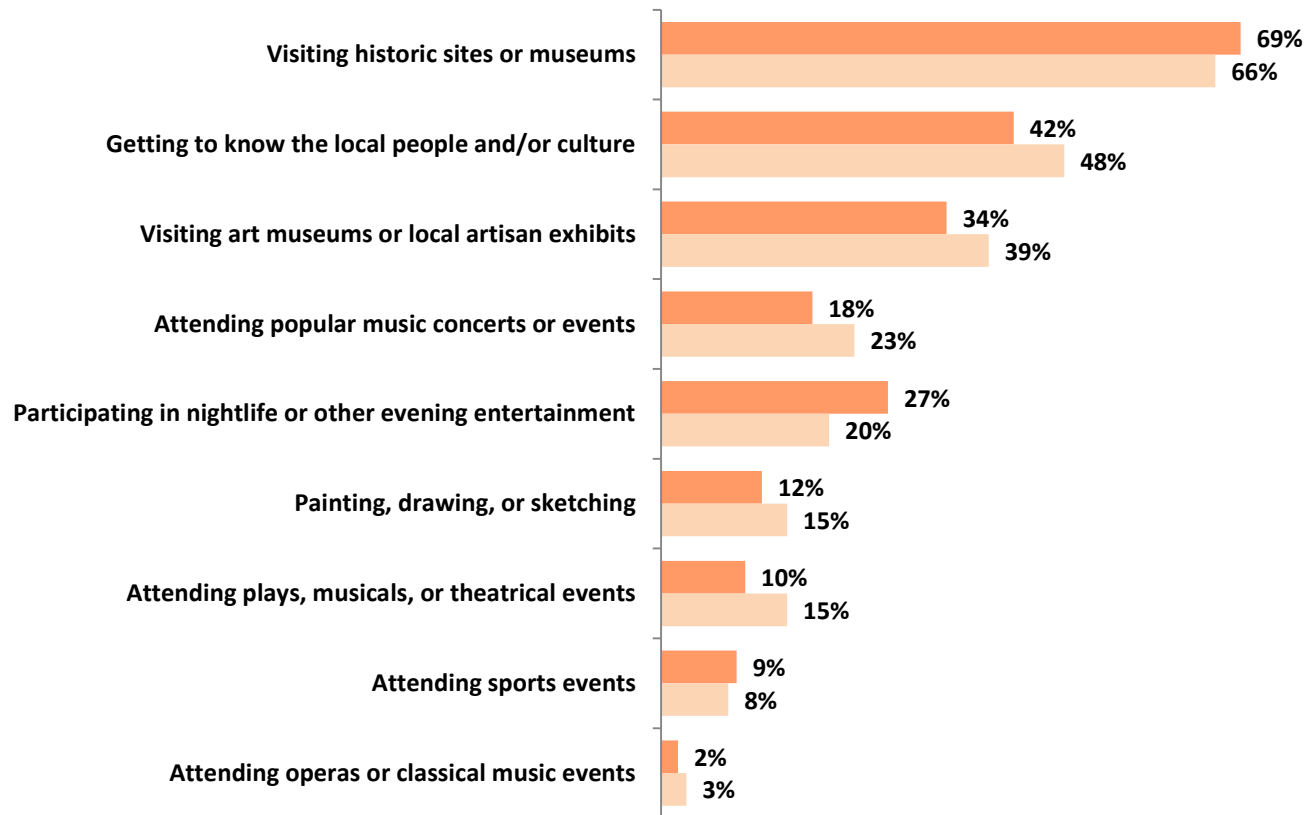
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Visiting historic sites or museums is the most popular pursuit among day visitors interested in history/culture.

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

History or Culture Activities

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

■ 2016 (n=310) ■ 2017 (n=358)

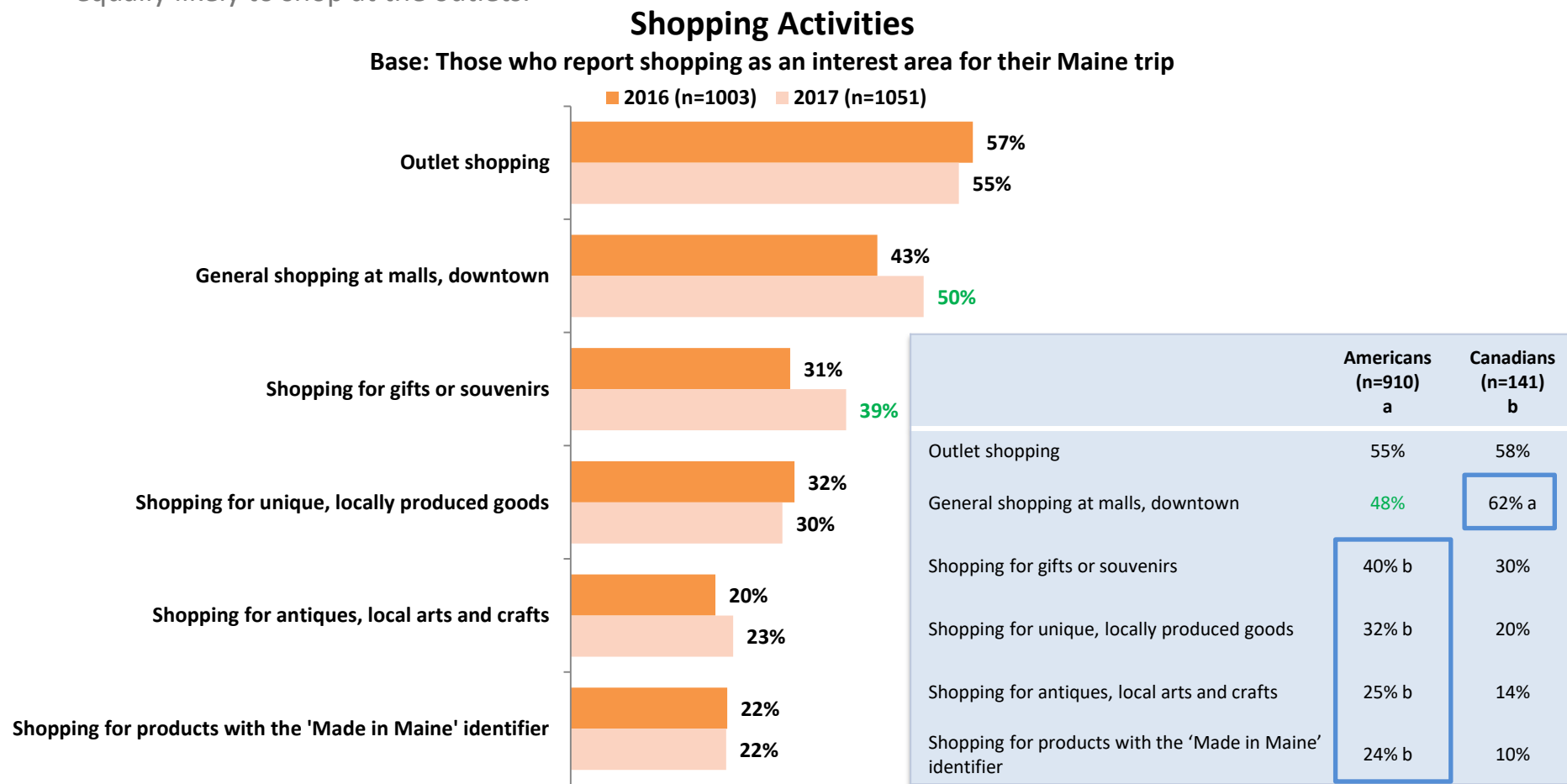| Activity	2016	2017
Visiting historic sites or museums	69%	66%
Getting to know the local people and/or culture	42%	48%
Visiting art museums or local artisan exhibits	34%	39%
Attending popular music concerts or events	18%	23%
Participating in nightlife or other evening entertainment	27%	20%
Painting, drawing, or sketching	12%	15%
Attending plays, musicals, or theatrical events	10%	15%
Attending sports events	9%	8%
Attending operas or classical music events	2%	3%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day visitors interested in shopping are most likely to shop at the *outlets* while in Maine, followed by *general mall/downtown shopping*.

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

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

■ 2016 (n=1003) ■ 2017 (n=1051)

Shopping Activity	2016	2017
Outlet shopping	57%	55%
General shopping at malls, downtown	43%	50%
Shopping for gifts or souvenirs	31%	39%
Shopping for unique, locally produced goods	32%	30%
Shopping for antiques, local arts and crafts	20%	23%
Shopping for products with the 'Made in Maine' identifier	22%	22%

	Americans (n=910) a	Canadians (n=141) b
Outlet shopping	55%	58%
General shopping at malls, downtown	48%	62% a
Shopping for gifts or souvenirs	40% b	30%
Shopping for unique, locally produced goods	32% b	20%
Shopping for antiques, local arts and crafts	25% b	14%
Shopping for products with the 'Made in Maine' identifier	24% b	10%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
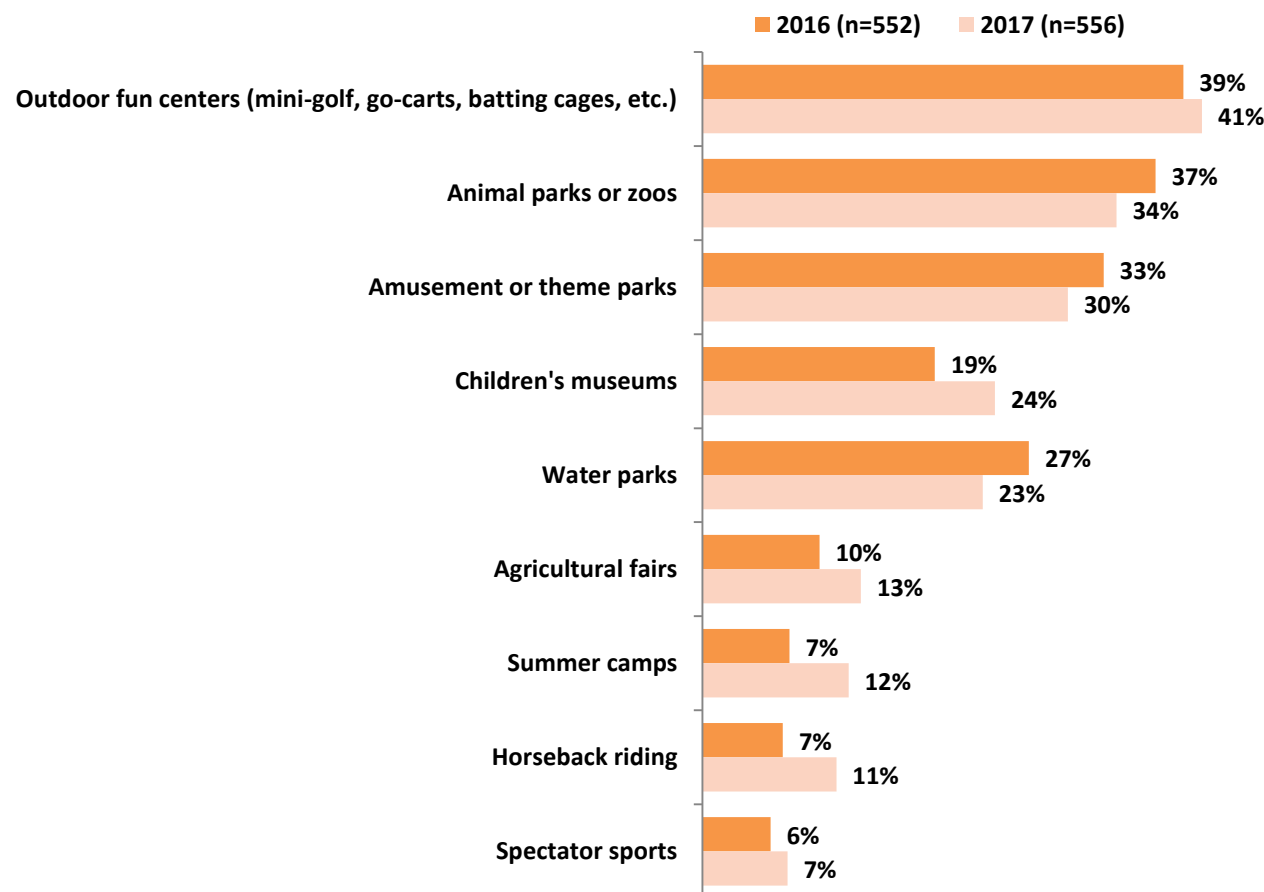<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Among day visitors interested in family fun/children's activities, *outdoor fun centers* are the most popular children's activity.

- *Animal parks or zoos* and *amusement or theme parks* are also popular among day visitors interested in family fun/children's activities.

Family Fun/Children's Activities
Base: Those who report family fun/children's activities as an interest area for their Maine trip

■ 2016 (n=552)　■ 2017 (n=556)

Activity	2016	2017
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	39%	41%
Animal parks or zoos	37%	34%
Amusement or theme parks	33%	30%
Children's museums	19%	24%
Water parks	27%	23%
Agricultural fairs	10%	13%
Summer camps	7%	12%
Horseback riding	7%	11%
Spectator sports	6%	7%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day Visitor Evaluations

Day visitors report that the *overall experience* surpassed their expectations while visiting Maine.

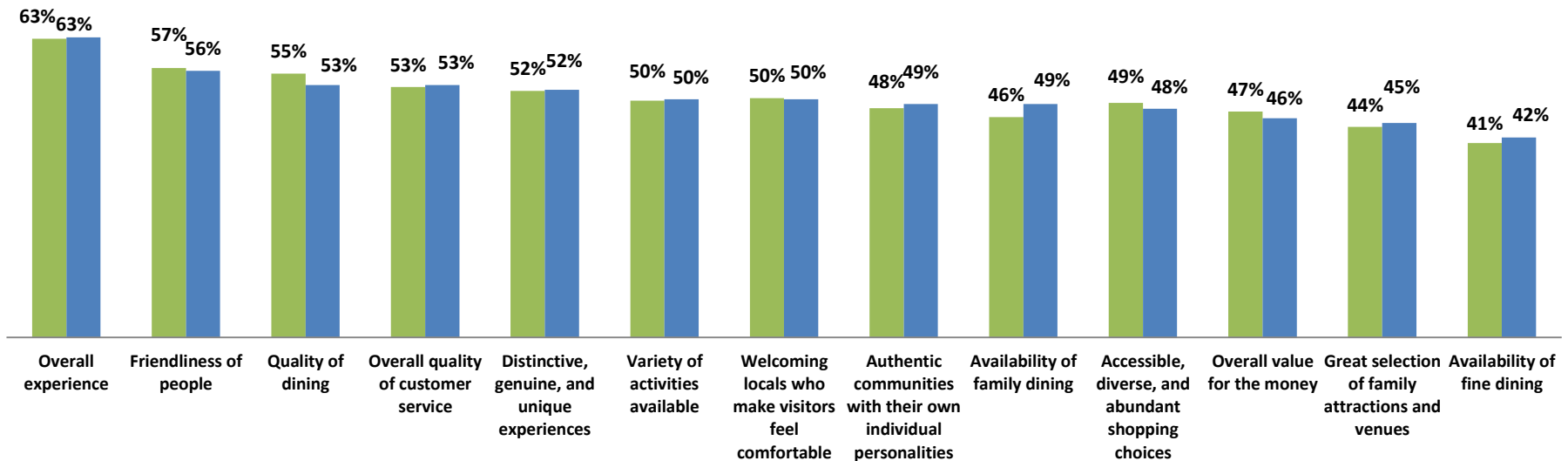- After *overall experience*, visitor expectations were most exceeded for the *friendliness of Maine's people*.

> **Traveler groups more likely to report that Maine exceeded their expectations on the majority of tested attributes:**
>
> - Balanced Achievers, and
> - Americans.

Maine Far Exceeded/Somewhat Above My Expectations

■ Top 2 Box 2016 (n=1762)   ■ Top 2 Box 2017 (n=1782)

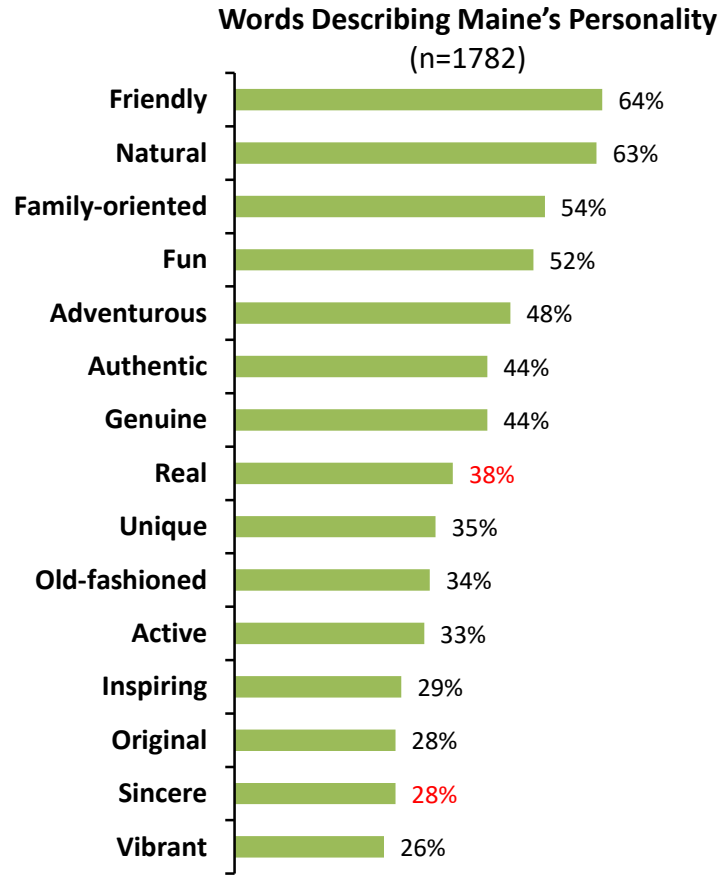| Attribute	2016	2017
Overall experience	63%	63%
Friendliness of people	57%	56%
Quality of dining	55%	53%
Overall quality of customer service	53%	53%
Distinctive, genuine, and unique experiences	52%	52%
Variety of activities available	50%	50%
Welcoming locals who make visitors feel comfortable	50%	50%
Authentic communities with their own individual personalities	48%	49%
Availability of family dining	46%	49%
Accessible, diverse, and abundant shopping choices	49%	48%
Overall value for the money	47%	46%
Great selection of family attractions and venues	44%	45%
Availability of fine dining	41%	42%

Q28. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- 2017 day visitors were less likely than 2016 day visitors to use *real* and *sincere* to describe Maine's personality.

Words Describing Maine's Personality
(n=1782)

Word	%
Friendly	64%
Natural	63%
Family-oriented	54%
Fun	52%
Adventurous	48%
Authentic	44%
Genuine	44%
Real	38%
Unique	35%
Old-fashioned	34%
Active	33%
Inspiring	29%
Original	28%
Sincere	28%
Vibrant	26%

Less Frequently Mentioned	
Creative	22%
Open-minded	19%
Passionate	18%
Enthusiastic	18%
Imaginative	17%
Quirky	13%
Dynamic	13%
Unexpected	8%
Offbeat	8%
Unusual	7%
Reserved	7%
Unconventional	6%
Boring	1%
Uninspiring	1%
Stodgy	1%

Q35. If Maine were a person, which of the following words would you choose to describe its personality? Please check all that apply. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Key Visitor Metrics

<u>Overnight</u> visitor spending averages $854 per travel party, with the highest proportion spent on *lodging*.

- Overnight visitor spending is lower in 2017, as compared to 2016. Overall, 2017 saw a <u>decrease</u> in the proportion of overnight visitors who spent any money in the *lodging, retail,* and *recreation* categories.

Average Trip Spending per Travel Party – Overnight Visitors*

Overnight Travel Spending	2016 Total (n=2909)	2017 Total (n=2922)	2017 Leisure (n=2545)	2017 Business (n=377)
Total Net Spending	$939	$854	$831	<$1010>
Lodging	$500	$491	$479	$555
Percentage Spending	82%	76%	73%	<91%>
Food	$242	$225	$226	$218
Percentage Spending	93%	93%	93%	90%
Retail Goods	$196	$179	$175	$213
Percentage Spending	68%	64%	<65%>	57%
Transportation	$132	$123	$120	$139
Percentage Spending	90%	90%	<91%>	84%
Recreation	$125	$114	$114	$120
Percentage Spending	51%	46%	<47%>	40%

Business travelers continue to spend <u>more</u>, on average, than leisure travelers. Also, while leisure travelers spent <u>less</u> in 2017 as compared to 2016, business travelers maintained similar spending levels overall between the two years (with the exception of a slight drop in food expenditures).

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

Q38. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Day visitor spending in 2017 is very close to 2016 day visitor spending.

Average Trip Spending per Travel Party – Day Visitors*

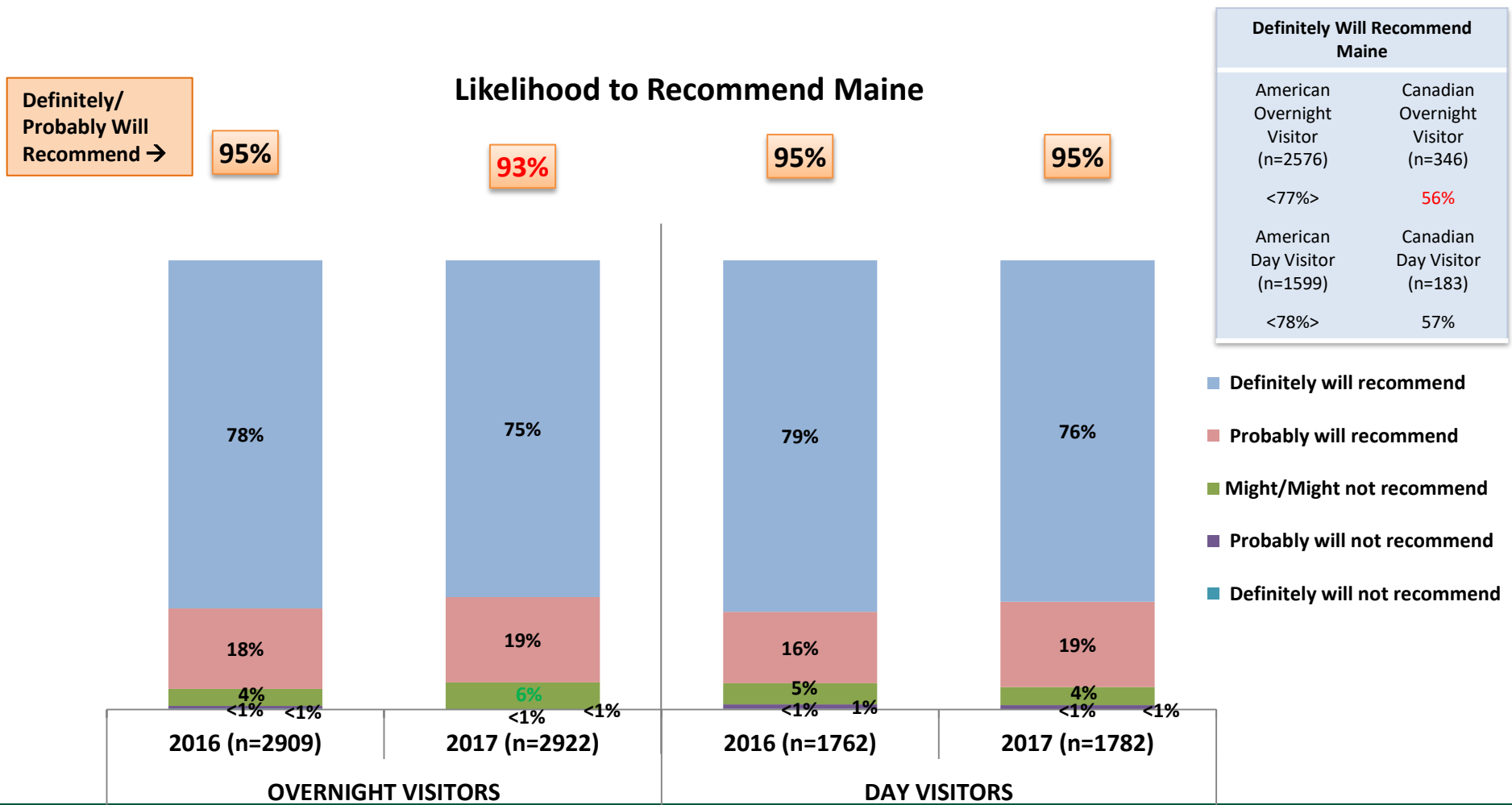| Day Travel Spending	2016 Total (n=1762)	2017 Total (n=1782)	2017 Leisure (n=1564)	2017 Business (n=218)
Total Net Spending	**$294**	**$303**	**$301**	**$320**
Retail Goods	**$128**	**$129**	**$126**	**$152**
Percentage Spending	*66%*	*68%*	*69%*	*67%*
Food	**$124**	**$127**	**$126**	**$129**
Percentage Spending	*95%*	*96%*	*96%*	*92%*
Recreation	**$74**	**$76**	**$74**	**<$94>**
Percentage Spending	*49%*	*54%*	*53%*	*60%*
Transportation	**$67**	**$68**	**$67**	**$76**
Percentage Spending	*96%*	*96%*	*96%*	*97%*

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

Q27. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Among both overnight and day visitors, domestic visitors are more likely than Canadian visitors to indicate that they *definitely will recommend* Maine as a vacation destination

Likelihood to Recommend Maine

Definitely/ Probably Will Recommend →

95%   **93%**   **95%**   **95%**

Definitely Will Recommend Maine

	American Overnight Visitor (n=2576)	Canadian Overnight Visitor (n=346)
	<77%>	56%
	American Day Visitor (n=1599)	Canadian Day Visitor (n=183)
	<78%>	57%

- Definitely will recommend
- Probably will recommend
- Might/Might not recommend
- Probably will not recommend
- Definitely will not recommend

OVERNIGHT VISITORS — 2016 (n=2909): 78%, 18%, 4%, <1%, <1%; 2017 (n=2922): 75%, 19%, 6%, <1%, <1%

DAY VISITORS — 2016 (n=1762): 79%, 16%, 5%, <1%, 1%; 2017 (n=1782): 76%, 19%, 4%, <1%, <1%
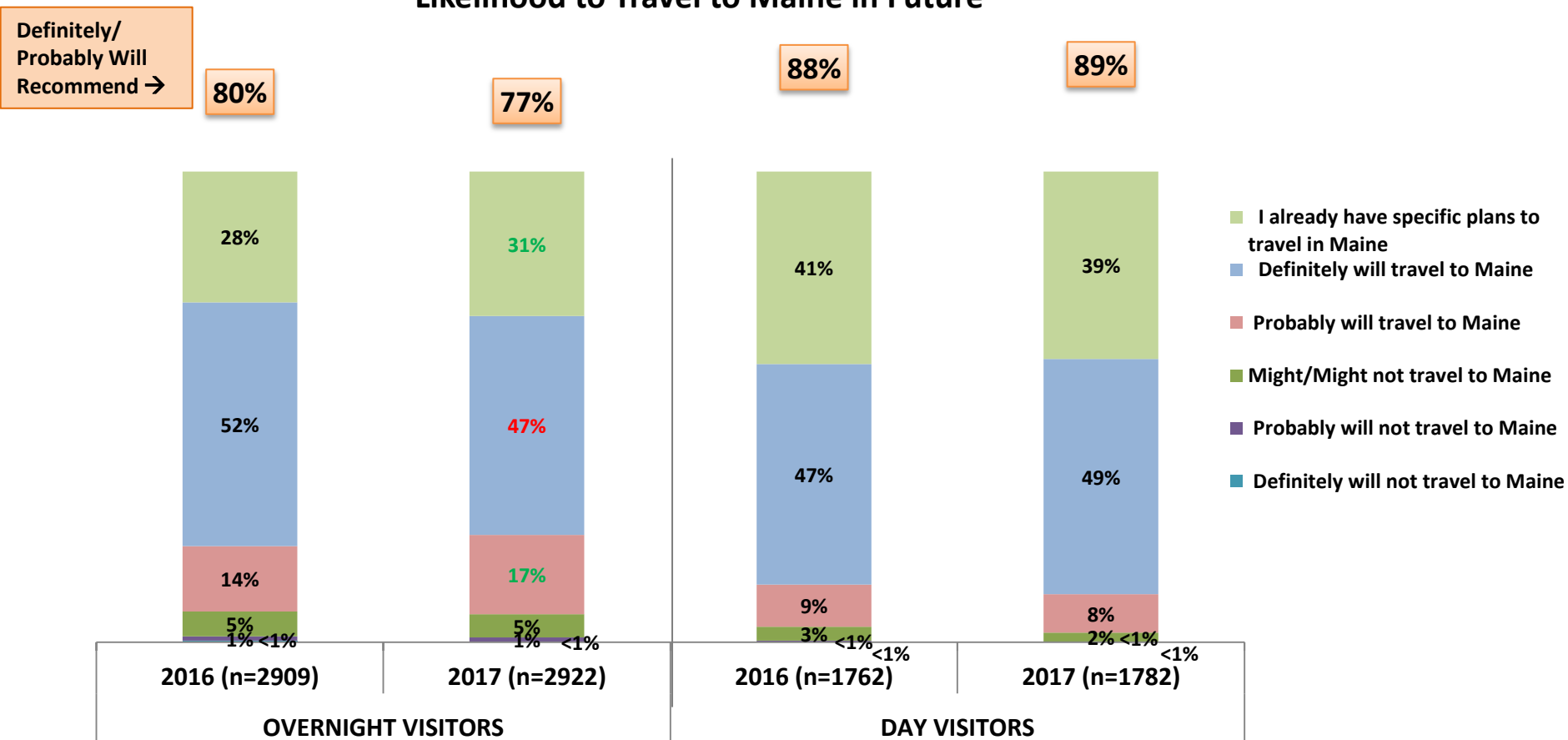
Overnight Q45, Day Q33. How likely will you be to recommend Maine as a vacation destination to friends or relatives? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Future intent to visit Maine also remains high.

Likelihood to Travel to Maine in Future

Definitely/
Probably Will
Recommend →

80% | **77%** | **88%** | **89%**

OVERNIGHT VISITORS

2016 (n=2909)
- 28%
- 52%
- 14%
- 5%
- 1% <1%

2017 (n=2922)
- 31%
- 47%
- 17%
- 5%
- 1% <1%

DAY VISITORS

2016 (n=1762)
- 41%
- 47%
- 9%
- 3%
- <1% <1%

2017 (n=1782)
- 39%
- 49%
- 8%
- 2% <1%
- <1%

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

Overnight Q44, Day Q31. How likely will you be to travel in Maine in the next two years?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Several groups of overnight travelers are more likely to express an intent to visit Maine again in the next two years than their counterparts.

Overnight Visitors
Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit

Americans (n=2576)	Canadians (n=346)
<80%>	**59%**
New England Resident (n=1757)	Mid-Atlantic Resident (n=818)
<85%>	68%
Paid Accommodations (n=1848)	Unpaid Accommodations (n=1074)
73%	<84%>
First-Time Visitors (n=598)	Repeat Visitors (n=2324)
61%	<81%>
Kids on Trip (n=936)	No Kids (n=1986)
<81%>	76%

Overnight Visitors
Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit

Balanced Achievers (n=1000) a	Genuine Originals (n=947) b	Social Sophisticates (n=258) c
84% bc	77%	72%

Q44. How likely will you be to travel in Maine in the next two years?
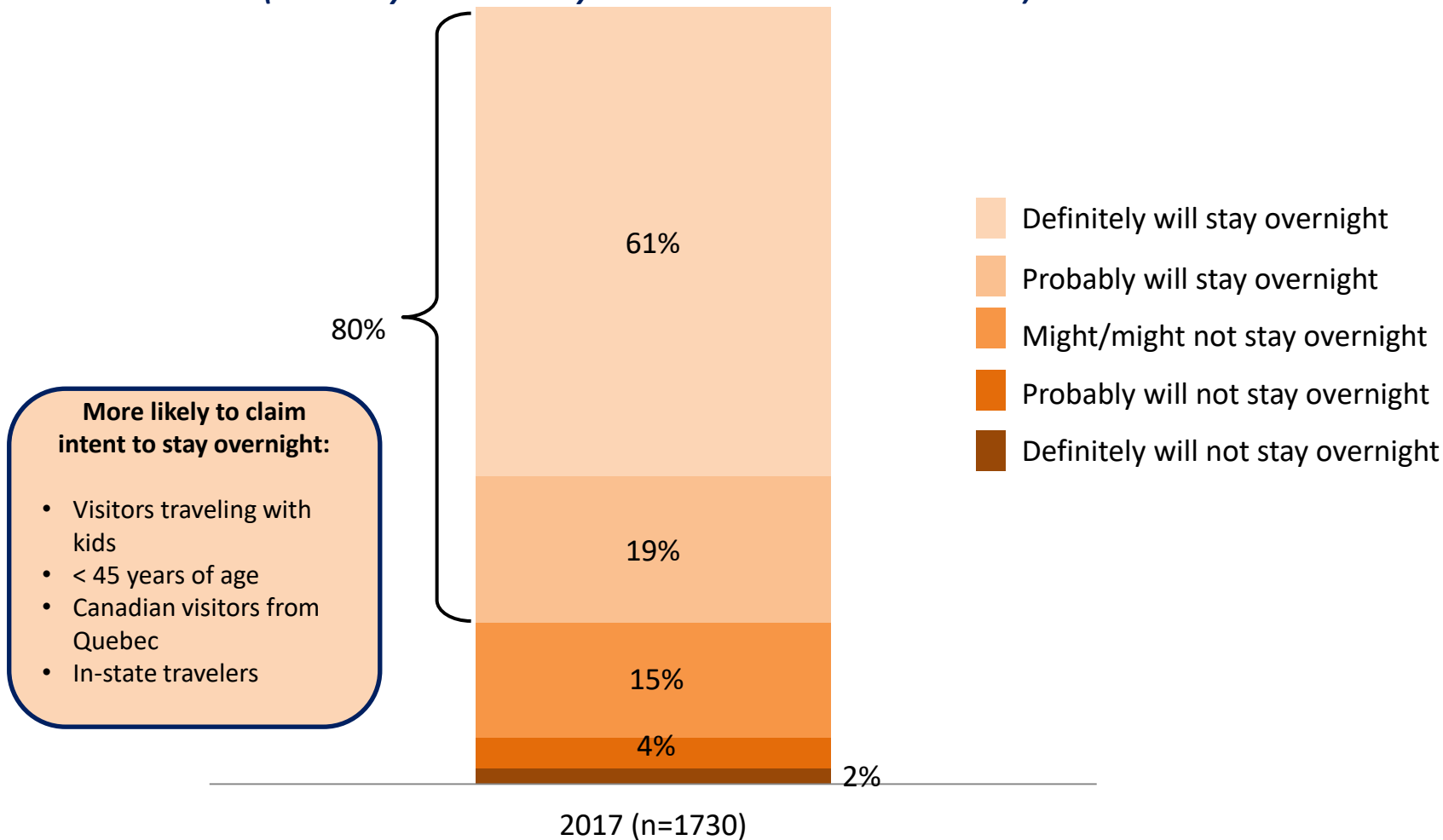<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Day Visitors *Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit*	
First-Time Visitor **(n=131)** 65%	**Repeat Visitor** **(n=1651)** <91%>
Americans **(n=1599)** <90%>	**Canadians** **(n=183)** 80%
Maine Resident **(n=572)** <94%>	**New England Resident** **(n=1027)** 87%

Q31. How likely will you be to travel in Maine in the next two years?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Likelihood of Staying Overnight in Maine in Next Two Years
(Base=Day Visitors Likely to Visit Maine in Next Two Years)

Legend:
- Definitely will stay overnight
- Probably will stay overnight
- Might/might not stay overnight
- Probably will not stay overnight
- Definitely will not stay overnight

Chart values:
- 80% (bracket covering top two segments)
- 61%
- 19%
- 15%
- 4%
- 2%

2017 (n=1730)

More likely to claim intent to stay overnight:

- Visitors traveling with kids
- < 45 years of age
- Canadian visitors from Quebec
- In-state travelers

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

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Demographic Profile

Visitor Demographics

	Overnight Visitors		Day Visitors	
	2016 **(n=2909)**	**2017** **(n=2922)**	**2016** **(n=1762)**	**2017** **(n=1782)**
Age:				
< 35	34%	39%	28%	33%
35 – 44	22%	23%	18%	19%
45 – 54	18%	16%	19%	19%
55 +	26%	22%	35%	29%
Mean Age (Years)	42.8	40.7	46.0	44.0
Income:				
< $50,000	20%	23%	26%	32%
$50,000 - $99,999	42%	43%	42%	41%
$100,000 +	39%	34%	32%	27%
Estimated Mean Income	$98,650	$92,650	$88,130	$80,750
Female	60%	70%	75%	76%
College Degree or Higher	66%	65%	63%	54%
Married	56%	50%	56%	48%
Employed Full Time	66%	62%	52%	52%

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

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Visitor Segments

- Overnight visitors to Maine in 2017 are most likely to be categorized as *Balanced Achievers* or *Genuine Originals*.

  – The proportion of overnight visitors categorized as *Balanced Achievers* decreased from 2016 to 2017, while the proportions categorized as *Genuine Originals* or *Social Sophisticates* increased slightly.

- Day visitors are most likely to fall into these two visitor segments also, with a higher proportion of *Genuine Originals* (31%) than *Balanced Achievers* (27%).

	Overnight Visitors		Day Visitors	
	2016 (n=2909)	2017 (n=2922)	2016 (n=1762)	2017 (n=1782)
Priority Segments:				
Balanced Achievers	42%	34%	27%	27%
Genuine Originals	28%	32%	35%	31%
Social Sophisticates	7%	9%	8%	7%

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

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Conclusions

Conclusions

Continued Upward Trend in Visitation

- **The State of Maine posted strong year-over-year growth in tourism-related visitation again in 2017, continuing the upward trend seen for several years now.** Maine succeeded in attracting 7.4% more overnight visitors than it had in 2016 and 3.5% more day visitors, combining for a 5.3% gain in <u>overall</u> visitation. Once again, Maine attracted a sizeable proportion of first-time visitors, successfully introducing new visitors to the State, while also bringing in a steady influx of repeat visitors.

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Conclusions

Evidence of Strong Visitor Loyalty Persists

- **Maine visitors exhibit many signs of loyalty towards the State as a travel destination.** Three-fourths of overnight visitors in 2017 did <u>not</u> consider any other destinations for their recent trip to Maine, already knowing in advance that Maine was their top-choice destination. In addition, four in five visitors stayed in Maine exclusively for their vacation without venturing to neighboring states or provinces during their stay. A strong desire to recommend Maine as a destination (more than nine in ten visitors will recommend) and high levels of future intent to visit Maine again (more than three in four visitors plan to visit again in the next two years) provide further confirmation of this loyalty to Maine as a travel destination.

Conclusions

Importance of Promoting Maine as a Family-Friendly Destination

- **Families traveling with children continue to make up a large and desirable contingent of Maine visitors.** For the last four years, one-third of travel parties to Maine have included children. Examining the travel habits and preferences of these visitors, we see that they tend to stay in Maine for longer periods of time, visit a wider geographic area within the State, spend more money, and show a higher intent to return to the State. Maine must continue to market itself as a family-friendly destination to maintain its attractiveness to these families traveling with children. Further exploration into the motivations, interests, and travel habits of this critical travel cohort is warranted.

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Conclusions

Canadian Visitation Rates Remain Stable

- **Following two consecutive years of decreases, the proportion of Canadians visiting Maine has remained the same since 2015, suggesting that the impact of the low exchange rate on Canadian visitation may have stabilized.** Despite a continued weak Canadian dollar, the decline in Canadian visitation appears to have potentially slowed over the past few years. 2017 also showed the second year-over-year increase in the proportion of Canadians visiting Maine for the first time, suggesting the successful introduction of the State to new Canadian visitors despite the weak Canadian dollar. In 2017, Canadian visitors continued their trend of spending more money than U.S. visitors (particularly on lodging and retail purchases) and staying in Maine longer while visiting. They also are more likely than U.S. visitors to stay in paid accommodations while visiting the State. Continued marketing to this core market is critical in order to maintain, and eventually increase, levels of Canadian visitation when the exchange rate becomes more favorable for Canadians.

Conclusions

Potential to Market the People of Maine as a Key Destination Asset

- **Local Maine residents remain a highly-rated aspect of a Maine vacation.** When visitors were asked to rate the level at which Maine either didn't meet, met, or exceeded their expectations on 15 different attributes, the three attributes that are a direct reflection of Maine's people rated in the top five for having exceeded visitor expectations. These attributes include: *friendliness of the people, welcoming locals who make visitors feel comfortable,* and *overall quality of customer service*. Visitors' appreciation for the kind and helpful nature of Maine residents supports an ongoing promotion of the individual friendly "faces" of Maine with which visitors will be greeted if they visit the State.

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