

# Maine Office of Tourism Visitor Tracking Research 2008 Annual Report

*Prepared by*



providing direction in travel & tourism

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# Introduction and Methodology



# Introduction

- The Maine Office of Tourism has commissioned Davidson-Peterson Associates to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of both visitors and prospective visitors.
- This research program was designed to:
  - Profile Maine visitors and best prospects in demographic terms as well as in their travel patterns;
  - Explore perceptions of Maine among visitors and best prospects;
  - Understand why some travelers choose to visit Maine while others go elsewhere;
  - Describe both seasonal and regional visitation patterns of Maine visitors;
  - Explore what Maine visitors like and dislike about the locations in Maine they have visited; and
  - Estimate levels of spending in Maine by residents and non-resident visitors.

# Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the eRewards national online panel. Data is collected on an ongoing basis.
- Information is gathered using three main surveys:
  - Regional Travel Survey
  - Maine Day Visitor Survey
  - National Omnibus Survey

# Methodology

- Regional Travel Study
  - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
  - Respondents are screened and qualified for one of three different surveys:
    - Maine Overnight Visitor Survey – travelers have taken an overnight trip in Maine during the past four weeks;
    - Maine Prospect Survey – travelers have taken an overnight leisure trip to New England or the Atlantic Provinces in the past four weeks, but have not traveled to Maine in the past three years; and
    - Maine Future Opportunities Survey – travelers have taken an overnight leisure trip in the past four weeks, but not within Maine or its key competitive states/provinces.
- Maine Day Visitor Study
  - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who have taken a day trip in Maine within the past four weeks.
- National Omnibus Study
  - Includes a nationally balanced sample of US residents; and
  - Used to determine the incidence of travel nationwide and Maine's share of that travel.

# Methodology

- This topline report outlines results from travel occurring between late June 2008 and April 9, 2009.
- Data was collected between July 28, 2008 and May 9, 2009. The number of completed surveys collected for each research component are as follows:
  - Maine Overnight Visitor Survey – 3,320
  - Prospect Survey – 1,600
  - Future Opportunities Survey – 1,111
  - Maine Day Visitor – 1,890
  - National Omnibus Survey – 16,840

## 2008 in Context

- According to the NOAA, “The year 2008 in Portland, Maine will go into the record books as one of the wettest years ever recorded in the past 138 years.”

	2008	Deviation from Mean
Temperature	46.8	+1.1 degrees
Precipitation	61.24”	+15.4”
Snowfall	91.4”	+25.0”

– Internet Source: [forecast.weather.gov/product.php?site=NWS&prodcut=CLA&issuedby=PWM](http://forecast.weather.gov/product.php?site=NWS&prodcut=CLA&issuedby=PWM)

- The Canadian dollar was particularly strong from January through September, with the currency being on par with the US dollar on several occasions during this time period. For the year in aggregate, the average exchange rate was \$0.94 USD/\$1.0 CAD. Thus far in 2009, the average exchange rate is \$0.84 USD/\$1.0 CAD.
- Gasoline prices spiked to \$4.16 per gallon in New England the week of June 16. Prices remained above \$3.00 per gallon through mid-October before declining to \$1.74 a gallon by the end of the calendar year.
- The Consumer Confidence Index reading for January 2008 was 87.9. By December, the Index declined to 38.0, which was an all-time low at that time.

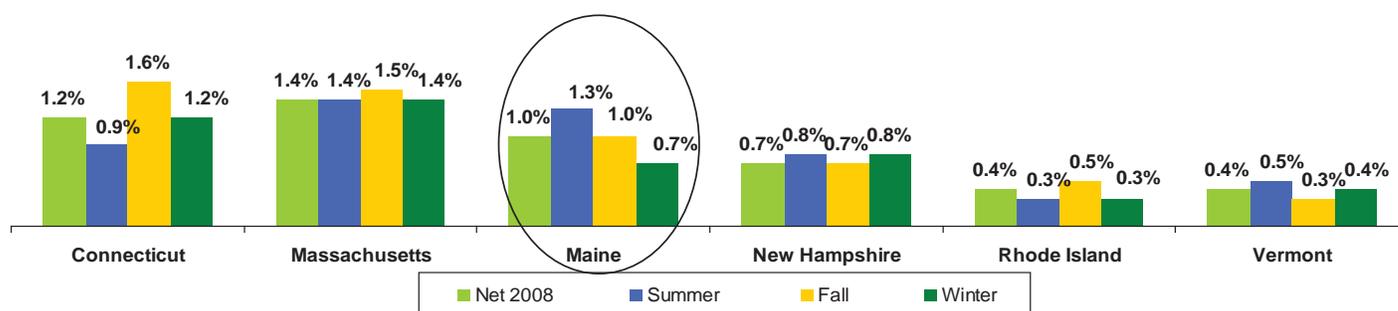
# Baseline Visitor Statistics



## Maine's Overnight Market Share Compared to New England – Leisure Travel

- Across 2008, Maine's share of leisure travel was below Connecticut and Massachusetts, but higher than New Hampshire, Rhode Island, and Vermont.
- Seasonally, Maine's share was highest in the summer and lowest in the winter. This seasonal market share pattern was not shared by any other New England state.

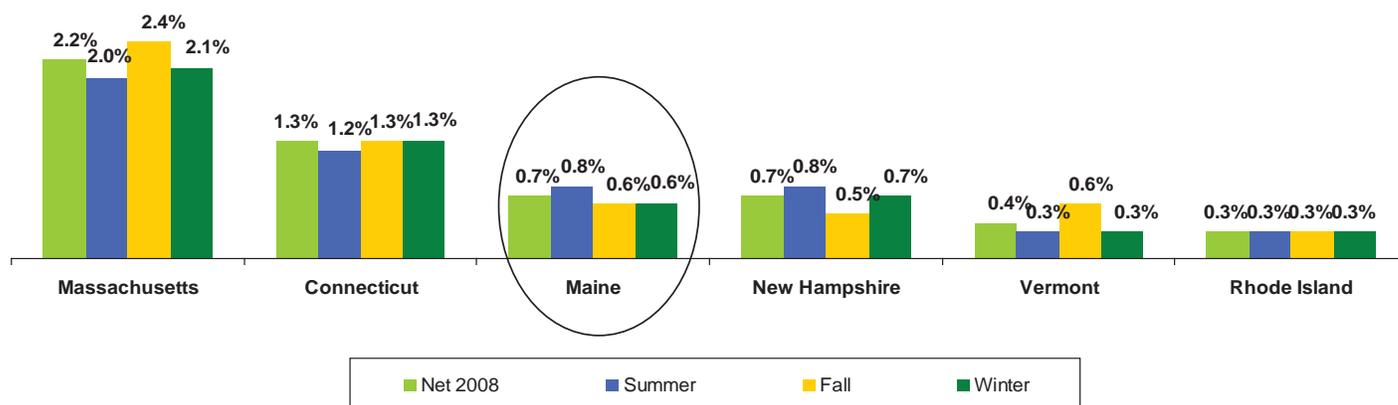
US Leisure Travel Market Share\*  
(Base=16,840)



# Maine's Overnight Market Share Compared to New England – VFR Travel

- Maine trailed Massachusetts and Connecticut by a wider margin for VFR travel compared with leisure travel.
- Maine was tied with New Hampshire for VFR travel in 2008, and led Vermont and Rhode Island.
- Unlike leisure travel market share, Maine's share of VFR travel was relatively consistent across the seasons.

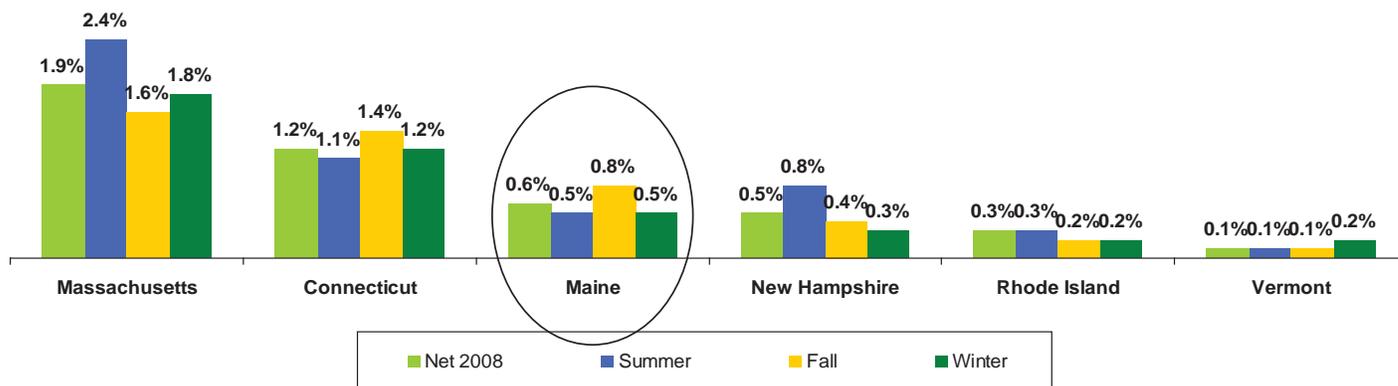
US Travel to Visit Friends/Relatives Market Share\*  
(Base=16,840)



## Maine's Overnight Market Share Compared to New England – *Business Travel*

- Business travel share across 2008 was similar to the VFR results. Maine trailed Massachusetts and Connecticut while it was on par with New Hampshire and ahead of Rhode Island and Vermont.
- Seasonally, there was a small increase in the fall compared to the summer and winter market share percentages.

**US Business Travel Market Share\***  
(Base=16,840)



# Estimated Visitation to Maine

In 2008:

- There were an estimated 6.2 million overnight trips and 6.4 million day trips made to Maine.
- This resulted in 15.4 million overnight visitors and 16.5 million day visitors to the state.

Overnight Travel*					Day Travel*			
	Leisure	Business	VFR	Total	Leisure	Business	VFR	Total
<b>Net 2008 Maine Trips</b>	2,660,382	885,725	2,628,344	6,174,450	3,060,995	1,219,597	2,126,669	6,407,262
<i>Non-Maine Residents</i>					1,577,327	658,582	1,148,401	3,384,310
<i>Maine Residents</i>					1,483,668	561,015	978,268	3,022,951
<b>Net 2008 Visitors</b>	7,374,080	1,863,850	6,184,518	15,422,448	8,501,963	2,362,249	5,664,612	16,528,824
<b>Summer Trips</b>	1,246,329	239,679	1,030,618	2,516,625	1,840,237	649,747	1,228,962	3,718,946
<b>Summer Visitors</b>	3,601,890	503,325	2,545,626	6,650,841	5,594,320	1,124,062	3,416,514	10,134,896
<b>Fall Trips</b>	998,238	462,598	949,544	2,410,381	653,822	309,705	496,726	1,460,253
<b>Fall Visitors</b>	2,645,332	989,960	2,193,446	5,828,739	1,444,948	730,905	1,261,683	3,437,535
<b>Winter Trips</b>	415,815	183,448	648,182	1,247,444	566,936	260,145	400,892	1,228,063
<b>Winter Visitors</b>	1,126,858	370,564	1,445,446	2,942,868	1,462,695	507,282	986,415	2,956,392

# Estimated Overnight Visitor Expenditures

In 2008:

- Overnight visitors spent an estimated \$5.8 billion on goods and services during their trips to Maine.
- Overnight leisure visitors spent the largest portion of the total – spending \$3.0 billion during their trips to Maine.
- Lodging accounts for the largest portion of overnight visitors' expenditures – amounting to \$2.0 billion of the total.

Additional details on spending for both overnight and leisure visitors by expenditure type is found on slides 69-82.

Overnight Travel*				
	Leisure	Business	VFR	Total
<b>Net Spending</b>	\$3,018,176,775	\$706,719,978	\$2,075,366,706	<b>\$5,800,263,459</b>
<b>Spending by Category:</b>				
<b>Lodging</b>	\$1,117,307,232	\$312,111,776	\$572,926,425	<b>\$2,002,345,433</b>
<b>Transportation</b>	\$409,459,394	\$113,045,082	\$386,839,670	<b>\$909,344,145</b>
<b>Food</b>	\$734,744,301	\$166,507,443	\$522,094,252	<b>\$1,423,345,996</b>
<b>Retail Goods</b>	\$597,787,835	\$77,128,933	\$459,145,413	<b>\$1,134,062,182</b>
<b>Recreation</b>	\$158,878,013	\$37,926,745	\$134,360,945	<b>\$331,165,703</b>

# Estimated Day Visitor Expenditures

- Non-Maine Residents who took a day trip to Maine spent \$1.04 billion dollars in Maine.
- Combined with the \$610 million spent on day trips by Maine residents, \$1.65 billion was spent by day visitors to Maine in 2008.

## Day Travel: Non-Maine Residents\*

	Leisure	Business	VFR	Total
<b>Net Spending</b>	\$561,843,877	\$212,985,419	\$270,000,559	<b>\$1,044,829,855</b>
<b>Spending by Category:</b>				
<b>Transportation</b>	\$108,567,417	\$66,009,674	\$78,516,176	<b>\$253,093,268</b>
<b>Food</b>	\$156,896,717	\$82,961,575	\$77,987,912	<b>\$317,846,203</b>
<b>Retail Goods</b>	\$250,432,208	\$47,516,691	\$95,719,223	<b>\$393,668,122</b>
<b>Recreation</b>	\$45,947,536	\$16,497,479	\$17,777,247	<b>\$80,222,262</b>

## Day Travel: Maine Residents\*

	Leisure	Business	VFR	Total
<b>Net Spending</b>	\$306,540,645	\$148,495,060	\$155,075,043	<b>\$610,110,749</b>
<b>Spending by Category:</b>				
<b>Transportation</b>	\$74,465,297	\$89,083,572	\$50,185,148	<b>\$213,734,017</b>
<b>Food</b>	\$81,572,067	\$32,213,481	\$51,075,372	<b>\$164,860,920</b>
<b>Retail Goods</b>	\$119,717,171	\$21,178,316	\$42,515,527	<b>\$183,411,014</b>
<b>Recreation</b>	\$30,786,111	\$6,019,691	\$11,298,995	<b>\$48,104,797</b>

Combined – Maine residents and Non-Residents spent \$1.65 billion in Maine last year.

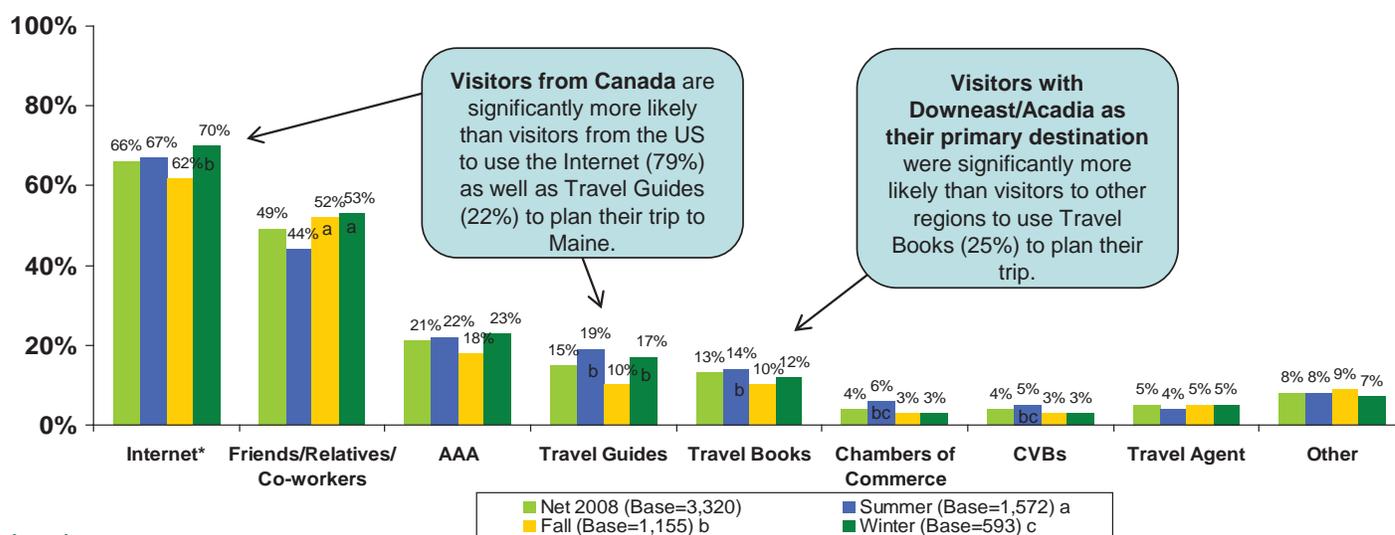
# Planning an Overnight Visit to Maine



# Travel Planning Sources

- The Internet and word-of-mouth were the dominant planning sources for overnight visitors to Maine.
- However, some specific traveler sub-groups show a higher than average propensity to use planning sources like Travel Guides and Travel Books. This shows that while the Internet plays a leading role in travel planning to Maine, some visitors still rely on offline sources to plan their trip to the state.

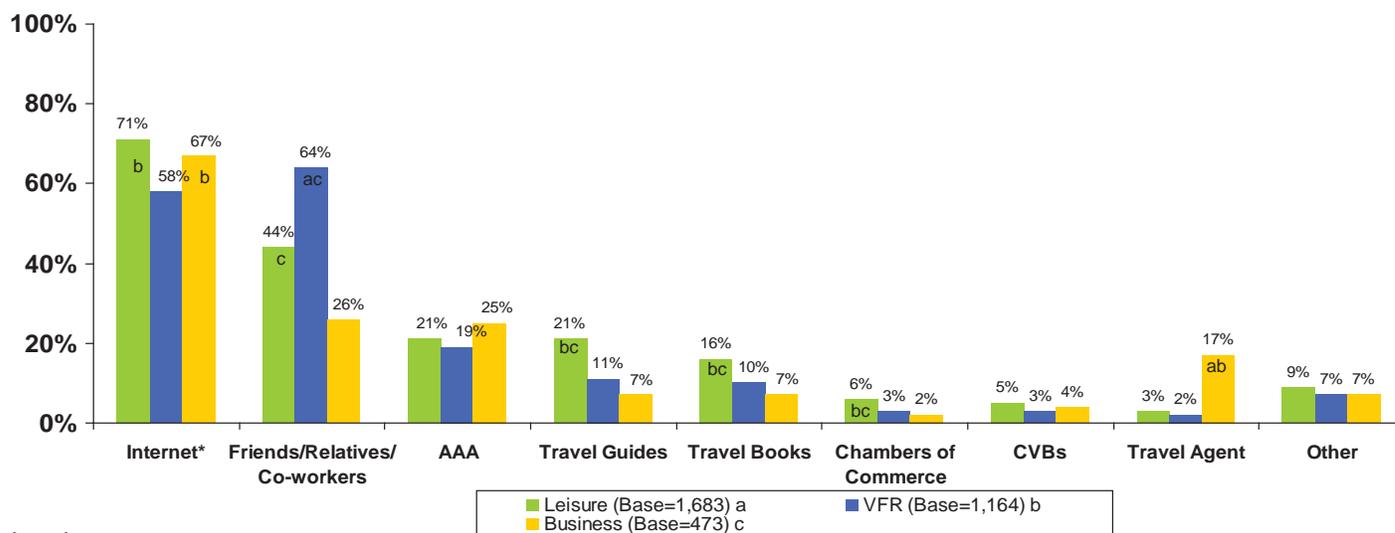
Travel Planning Sources



# Travel Planning Sources by Trip Type

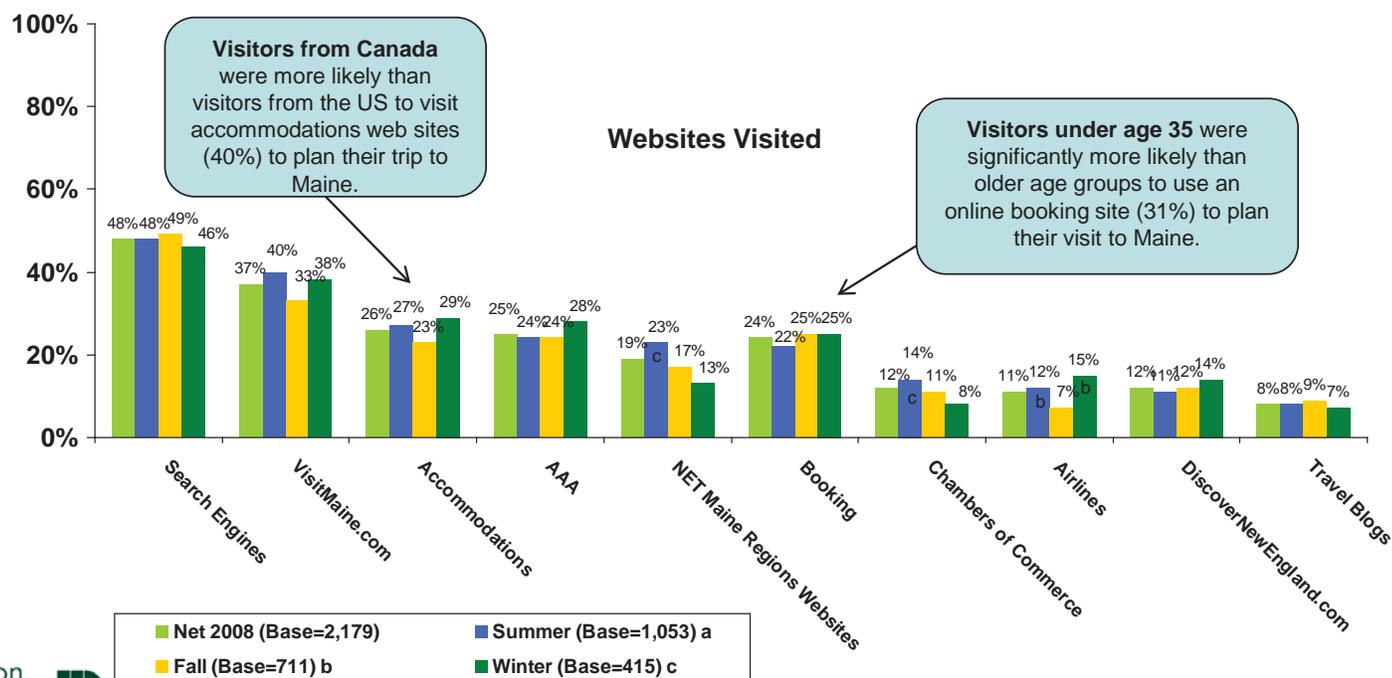
- Overnight leisure visitors are significantly more likely than VFR or business visitors to use sources like travel guides, travel books, and chambers of commerce to plan their trip to Maine.
- Overnight VFR visitors are significantly more likely than leisure or business visitors to use word-of-mouth – likely the people they’re visiting – to plan their trip to Maine.

Travel Planning Sources



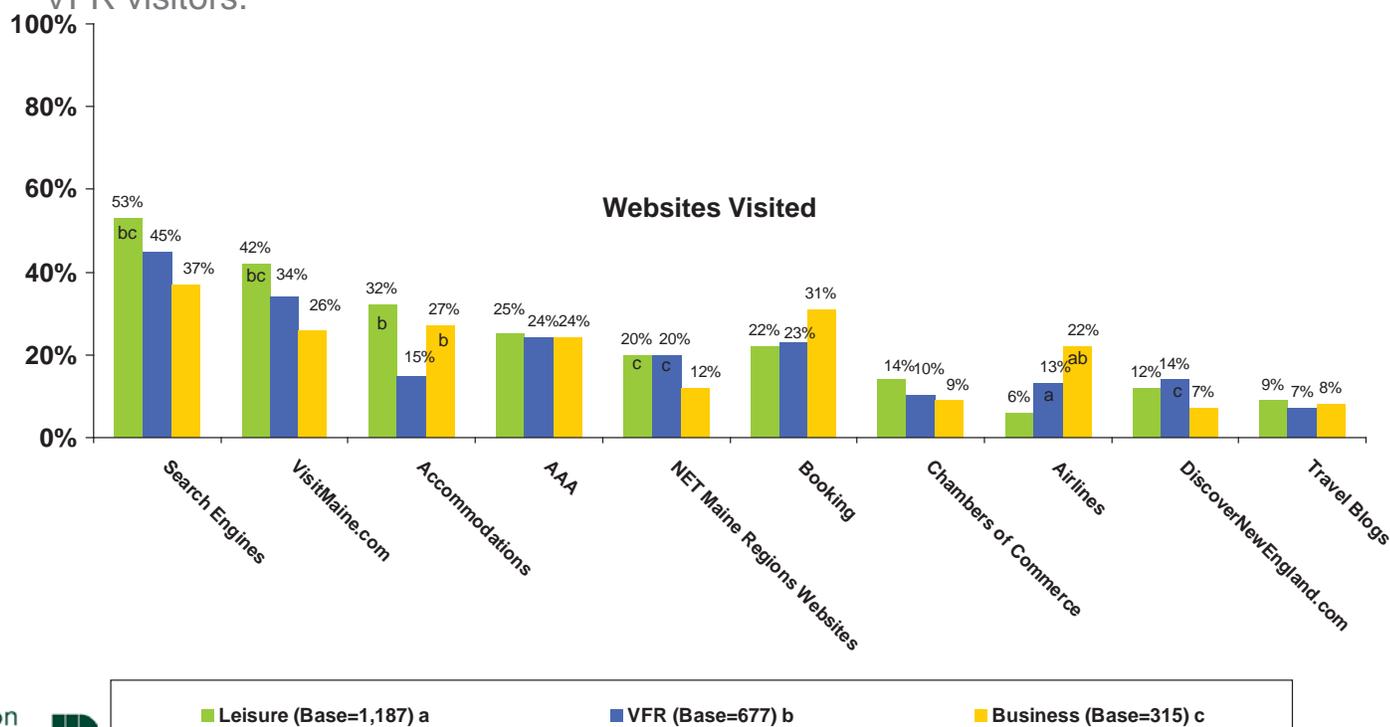
# Online Travel Planning

- Search engines and VisitMaine.com both play a leading role in online travel planning to Maine.
- The second tier of sites used to plan an overnight trip to Maine include accommodation sites, AAA, regional Maine sites, and travel booking sites.



# Online Travel Planning by Trip Type

- Overnight leisure visitors who use the web to plan their trip are significantly more likely than VFR or business visitors to use search engines or VisitMaine.com. This underscores the importance of SEO in connecting potential leisure visitors to VisitMaine.com and other key tourism sites for the state.
- Overnight business visitors gravitate toward airline sites more so than leisure or VFR visitors.



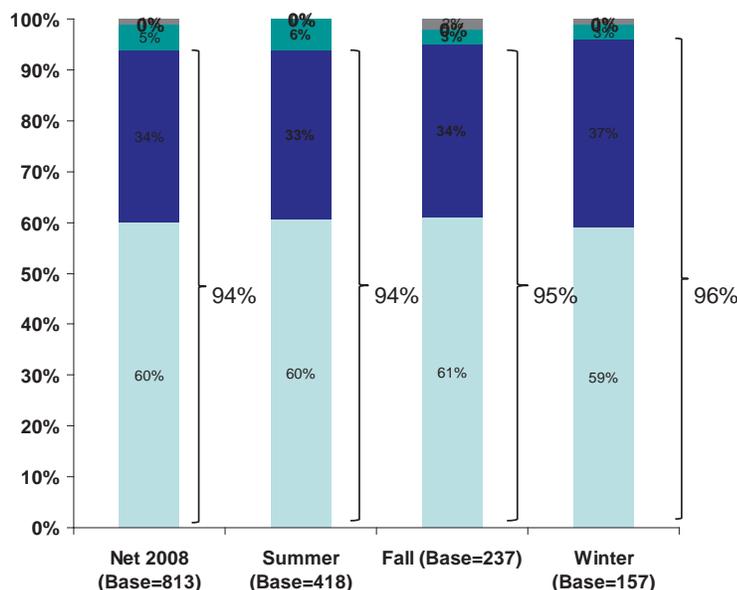
Regional Q18. Which of the following websites did you visit when planning this trip in Maine? (Please check all that apply)  
 a,b,c significant difference at the 95% confidence level

# VisitMaine.com

- VisitMaine.com satisfaction was consistent and extremely high across 2008.
- Accordingly, the vast majority of VisitMaine.com visitors reported that they found what they wanted on the site.

Across 2008, 87% of site visitors found the information they wanted on visitmaine.com

Satisfaction with VisitMaine.com



Respondents who went to VisitMaine.com provided feedback on what additional information they would like to see on the site. Some items mentioned by multiple visitors include:

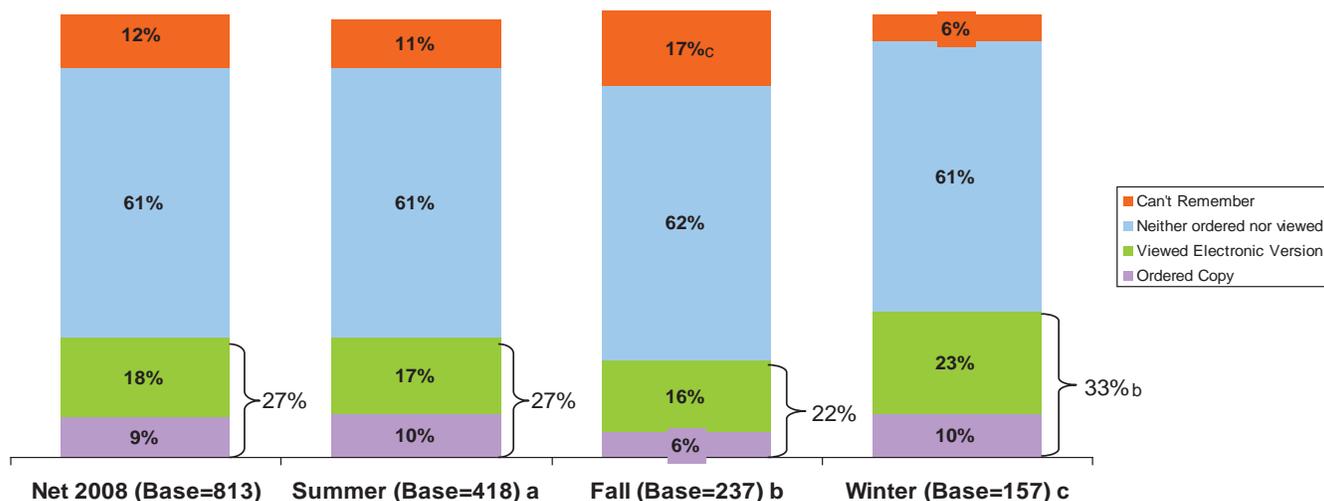
- More detailed accommodation information.
- More/better maps. Interactive maps.
- More information on local events.
- More information on smaller and/or specialty shops/restaurants.

Legend: Very pleased (light blue), Somewhat pleased (dark blue), Neither pleased nor displeased (teal), Somewhat displeased (light green), Very displeased (grey)

# “Maine Invites You” Travel Planner

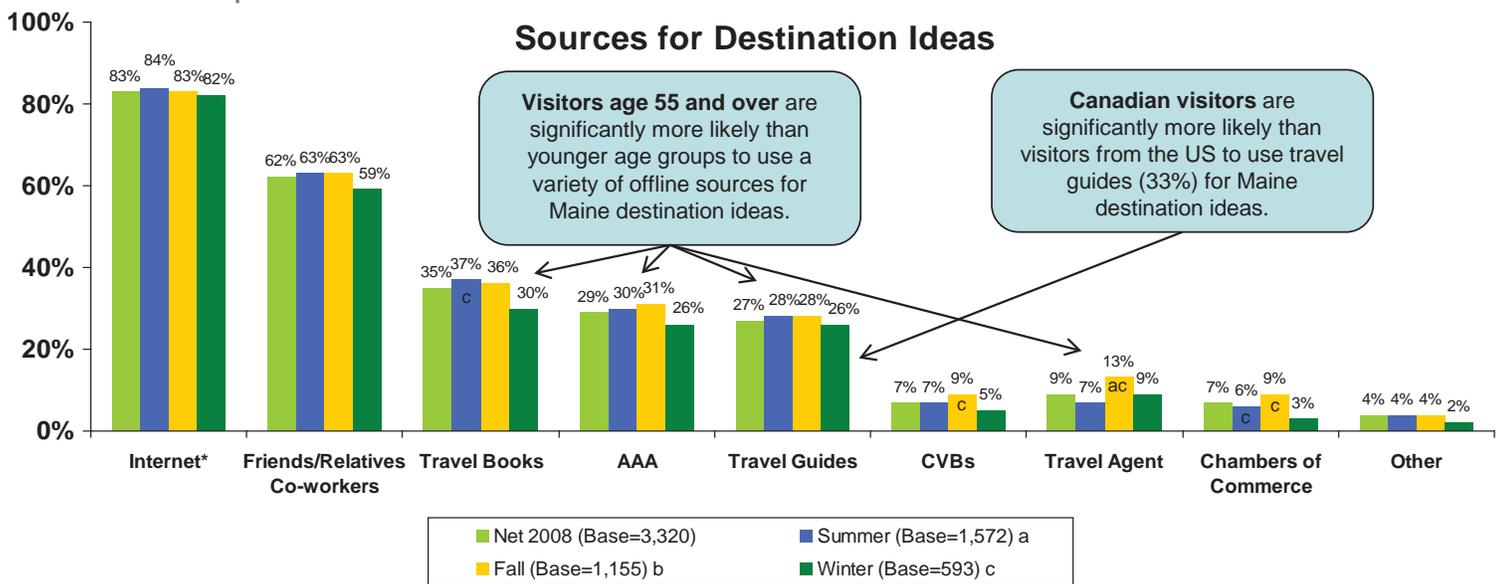
- Across 2008, approximately one-quarter of VisitMaine.com visitors viewed or ordered the “Maine Invites You” travel planner. As was highlighted in the Winter report, this increased to one-third of site visitors in the winter season.

Maine Invites You Travel Planner



# General Travel Planning Sources – Initial Ideas for Destinations

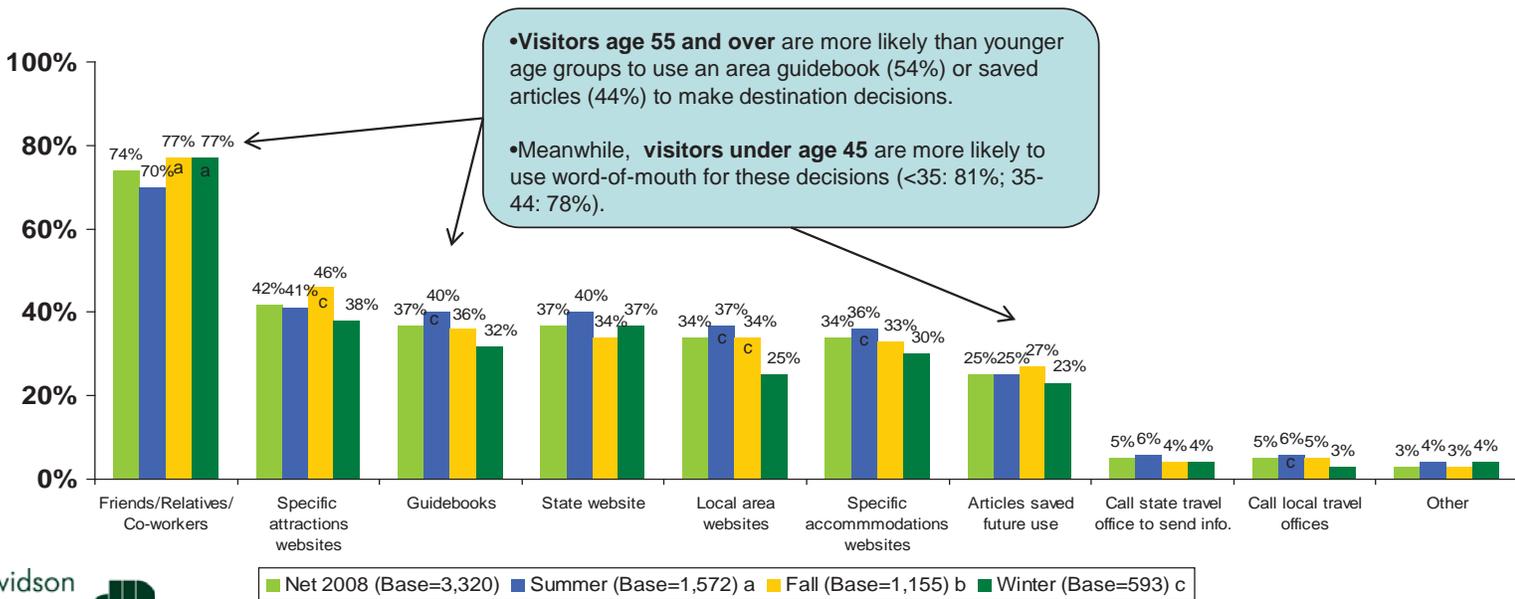
- As with general travel planning, overnight visitors to Maine also rely heavily on the Internet and word-of-mouth for specific destination ideas. This is especially the case for leisure and VFR visitors.
- Interestingly, visitors age 55 and over were significantly more likely than younger age groups to use a variety of different offline sources to plan their trip to Maine. Meanwhile, Canadians were more partial to Travel Guides than were their US counterparts.



# General Travel Planning Sources – Destination Decision

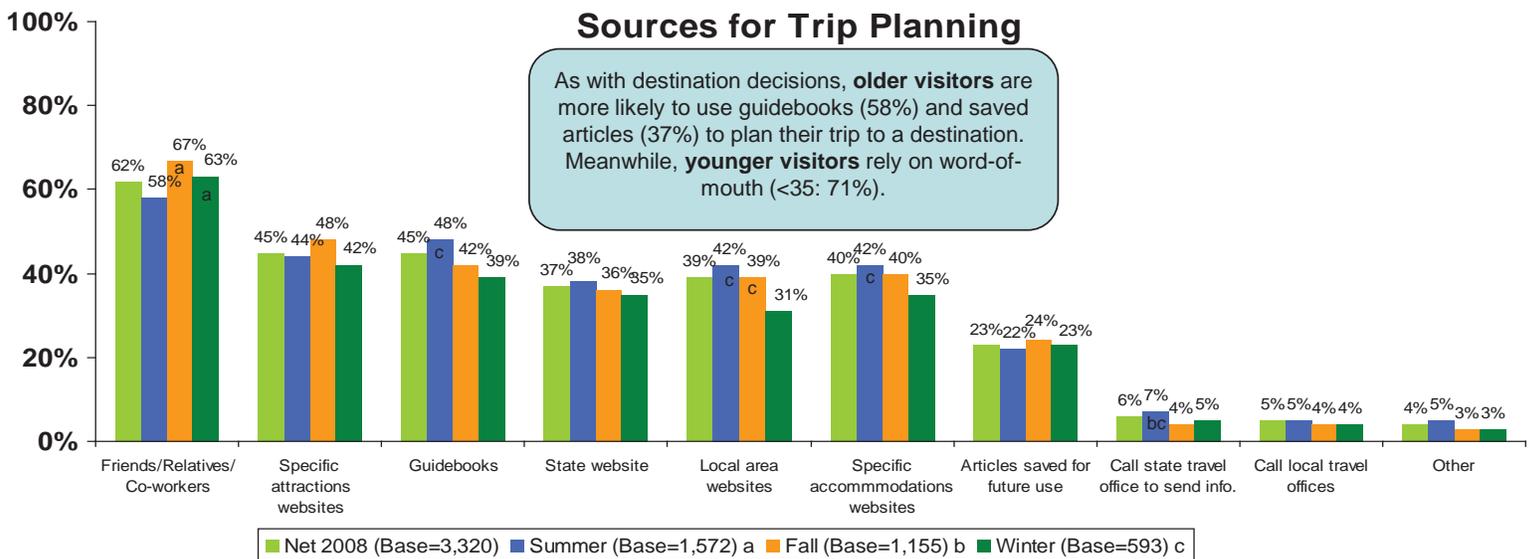
- When visitors decide between specific destinations, they are most likely to use word-of-mouth. VFR visitors are significantly more likely than leisure or business visitors to use word-of-mouth for their destination decisions.
- Aside from word-of-mouth, there is a second tier of information used by between one-quarter to just under half of visitors. This second tier includes attraction sites, state and local sites, guidebooks, accommodation sites, and saved articles.

## Sources for Destination Decisions



# General Travel Planning Sources – Trip Planning

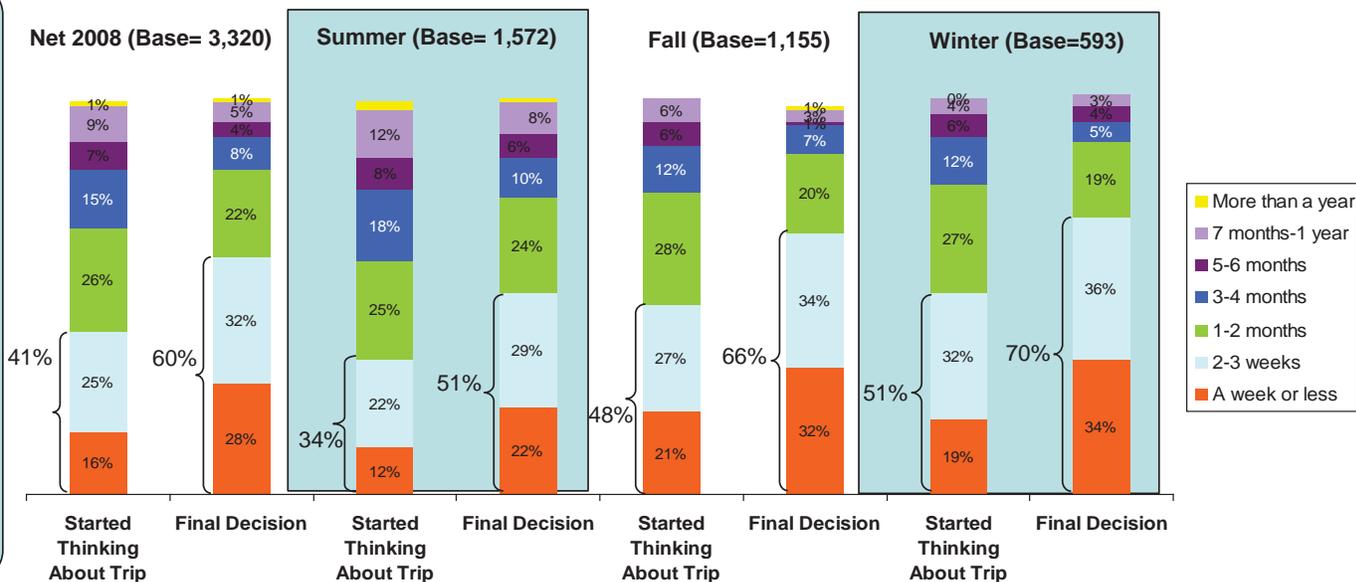
- The relative gap between use of word-of-mouth and the second tier of information sources cited on the last slide decreases once a destination has been chosen.
- However, the relative use of these sources across age groups remains consistent with the patterns exposed on the previous slide.



# Planning Time Frame

- Overnight trips to Maine had a shorter decision-making timeframe in the fall and winter versus the summer.
- Leisure and VFR visitors had a very similar decision-making timeframe, while business travelers were significantly more likely to make a decision within 2-3 weeks of the trip.

Decision Making Time Frame: Total Overnight Visitors

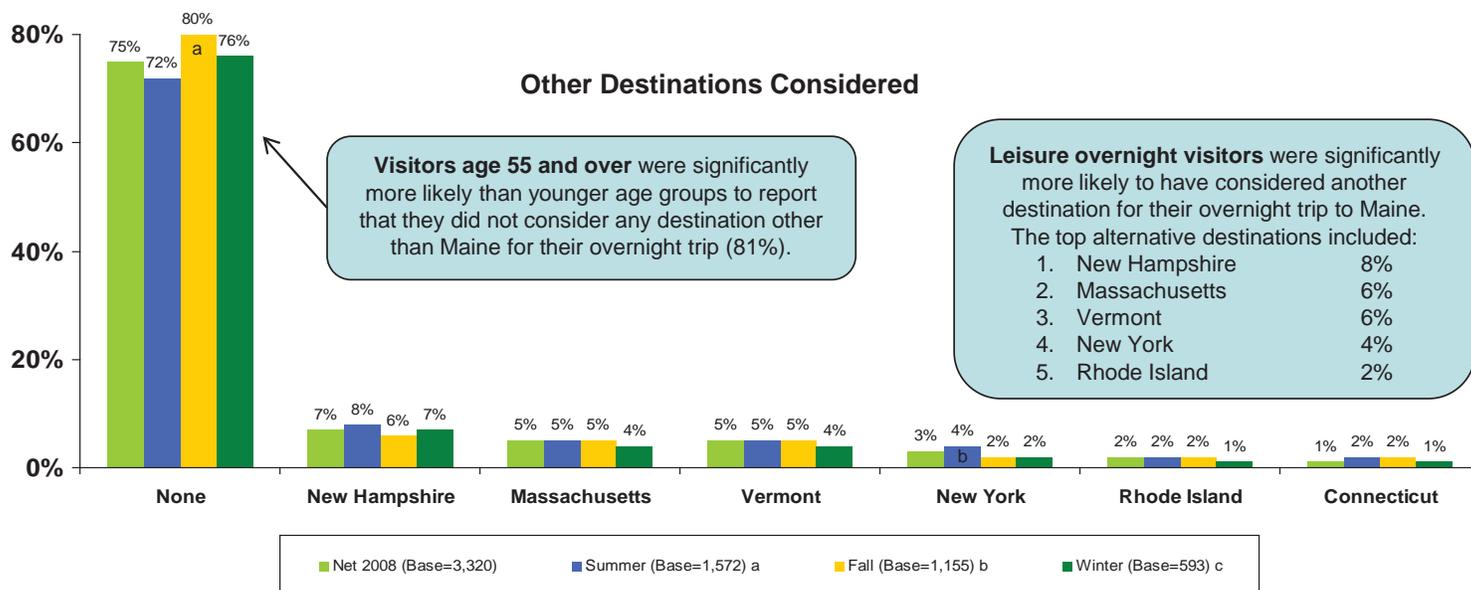


•Visitors under age 35 were more likely to decide to come to Maine within a week of their trip (33%).

•Visitors who live in Maine were also more likely to make their final decision within a week of their trip (42%).

# Other Destinations Considered

- Three-quarters of overnight visitors did not consider any other destinations for their trip to Maine. This was especially the case for visitors age 55+ versus younger age groups.
- Also, fewer overnight visitors considered another destination in the fall season compared with the summer season.



# The Maine Visitor Experience: Day and Overnight Visitors

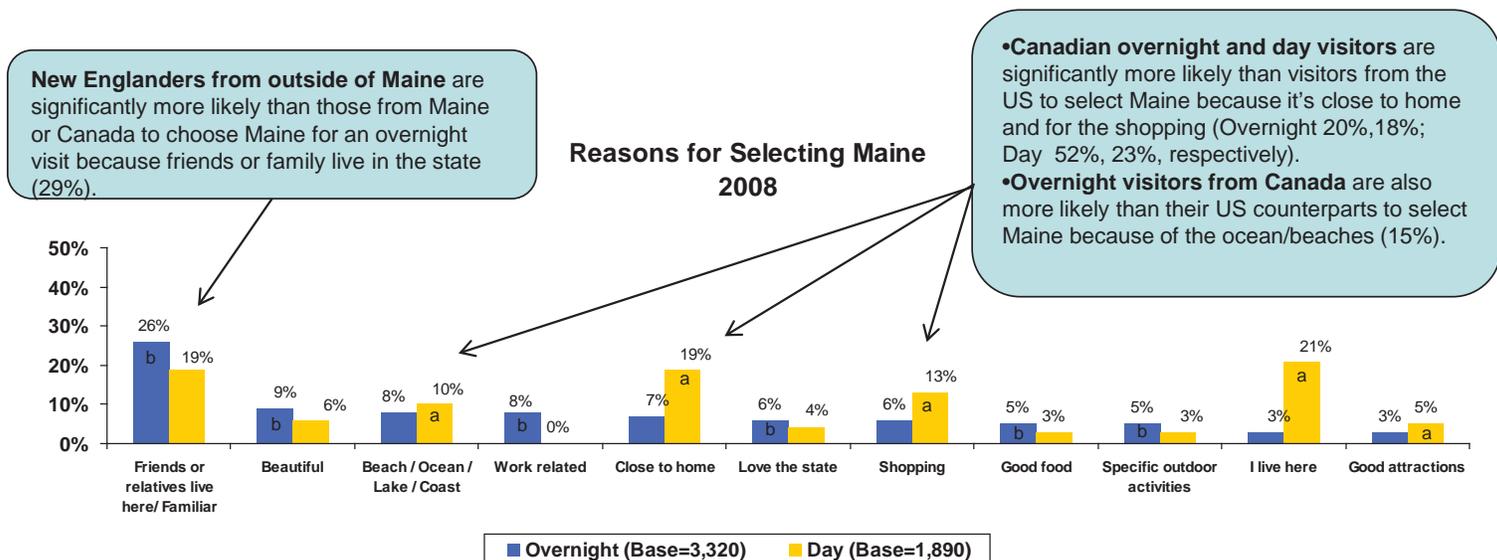


# The Maine Visitor Experience: Background and Regions



# Reasons for Selecting Maine

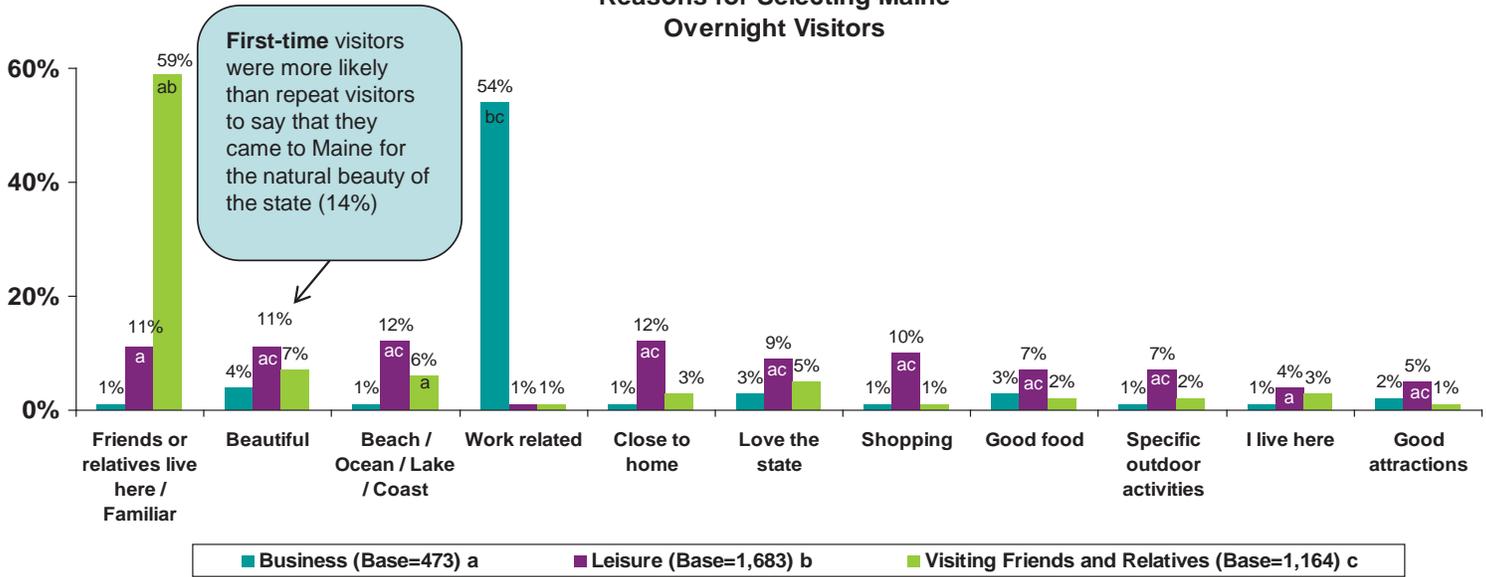
- Non-Maine New Englanders are more likely than their Maine and Canadian counterparts to visit Maine overnight to visit friends and family.
- Meanwhile, Canadian overnight and day visitors are more likely to point to shopping and the state's close proximity to home for their trip to Maine. Canadians' visitation to Maine to shop will be explored further in the presentation when analyzing the primary purpose of the trip and overall trip activities.



# Reasons for Selecting Maine by Trip Type: Overnight Visitors

- More than half of VFR overnight visitors report that they chose Maine to visit their friends or relatives. Likewise, most business overnight visitors cited work-related reasons as why they selected the state.
- Conversely, leisure overnight visitors were significantly more likely than VFR or business overnight visitors to choose Maine for reasons including: the beauty of the state, the beach/ocean/coast/lakes, proximity to home, shopping, loving the state, and others.

Reasons for Selecting Maine Overnight Visitors

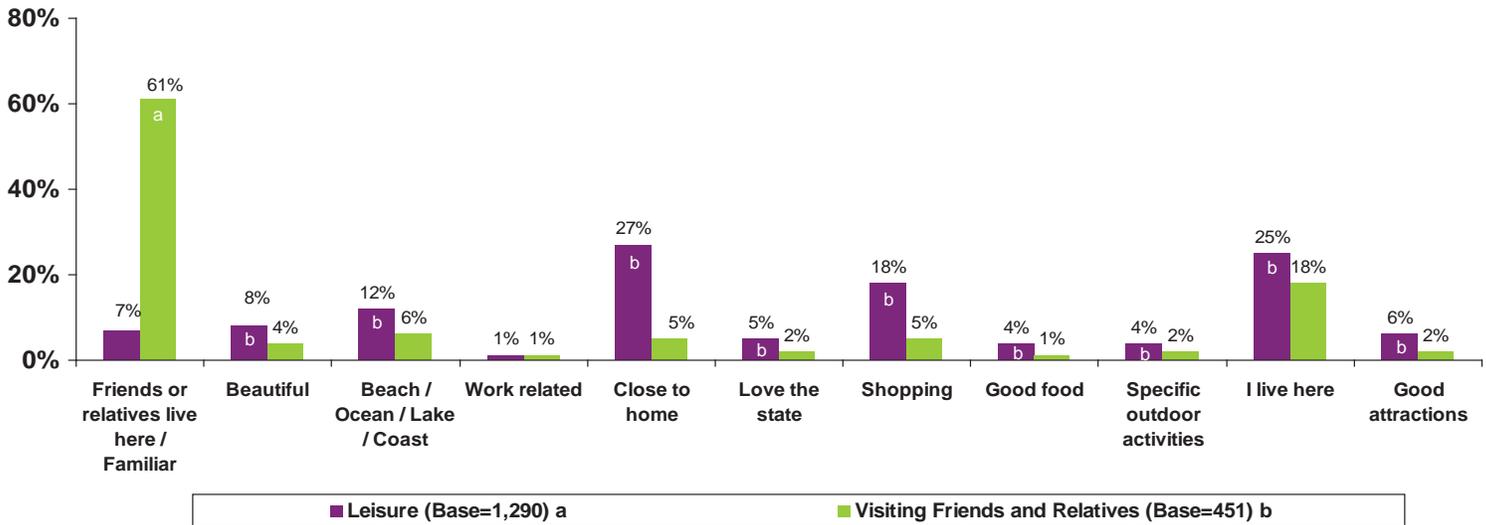


First-time visitors were more likely than repeat visitors to say that they came to Maine for the natural beauty of the state (14%)

# Reasons for Selecting Maine by Trip Type: Day Visitors

- In a similar pattern to overnight visitors, most VFR day visitors selected Maine to see family and friends. Meanwhile, leisure day visitors were significantly more likely to select Maine for other reasons including its proximity to home, the shopping, owning a property in Maine, or the beach/ocean/lakes/coast.

Reasons for Selecting Maine  
Day Visitors

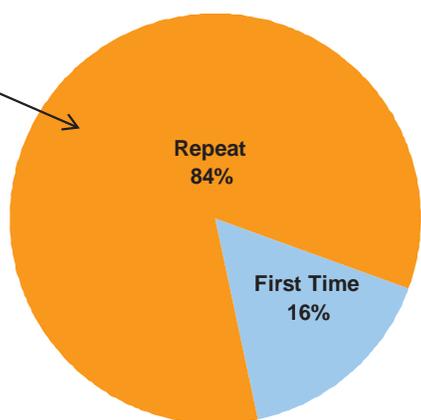


# Repeat versus First Time Visitors

- Overall, one-sixth of overnight visitors report that it was their first visit to Maine. This percentage increases to more than one-fifth to one-quarter for visitors who went to either the Highlands or Lakes/Mountains regions, respectively.

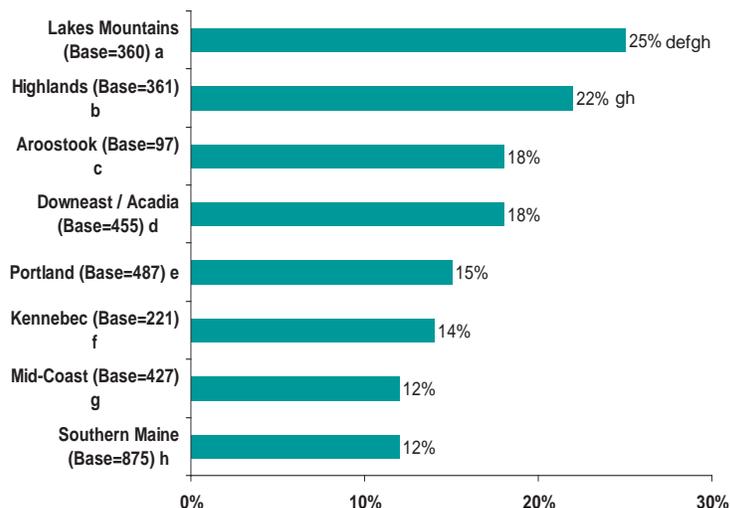
In 2008, the average overnight Maine visitor has been to Maine an average of 14 times in the past five years

**First Time Versus Repeat (Base=3,320)**



Leisure visitors are more often visiting Maine for the first time than those in Maine to see friends or relatives (19% vs. 13%).

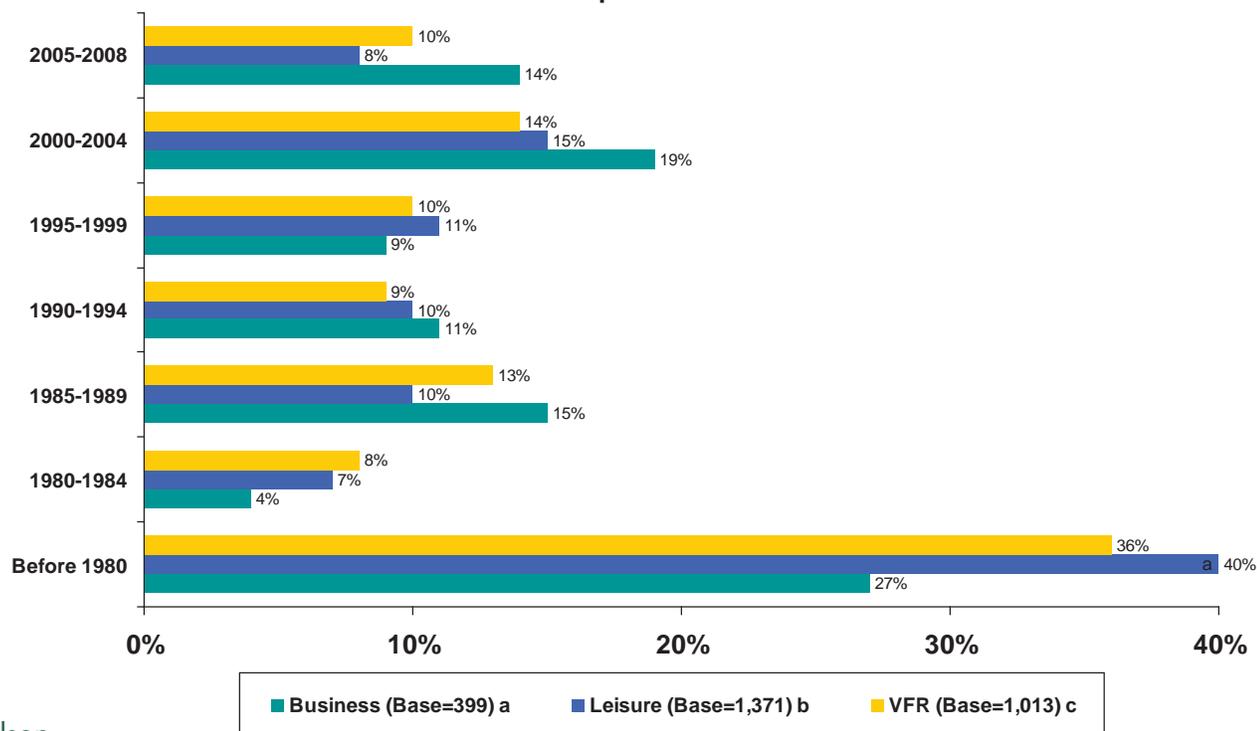
**Percent of Visitors to Each Region Who Were First-Time Maine Visitors (Base=3,320)**



# Year First Visited Maine by Trip Type: Overnight Visitors

- Across all trip types, the highest percentage of overnight visitors in each group report that they first came to Maine before 1980.
- Just under one-quarter of leisure overnight visitors report that they came to Maine for the first time since 2000.

Year that Repeat Visitors First Came to Maine

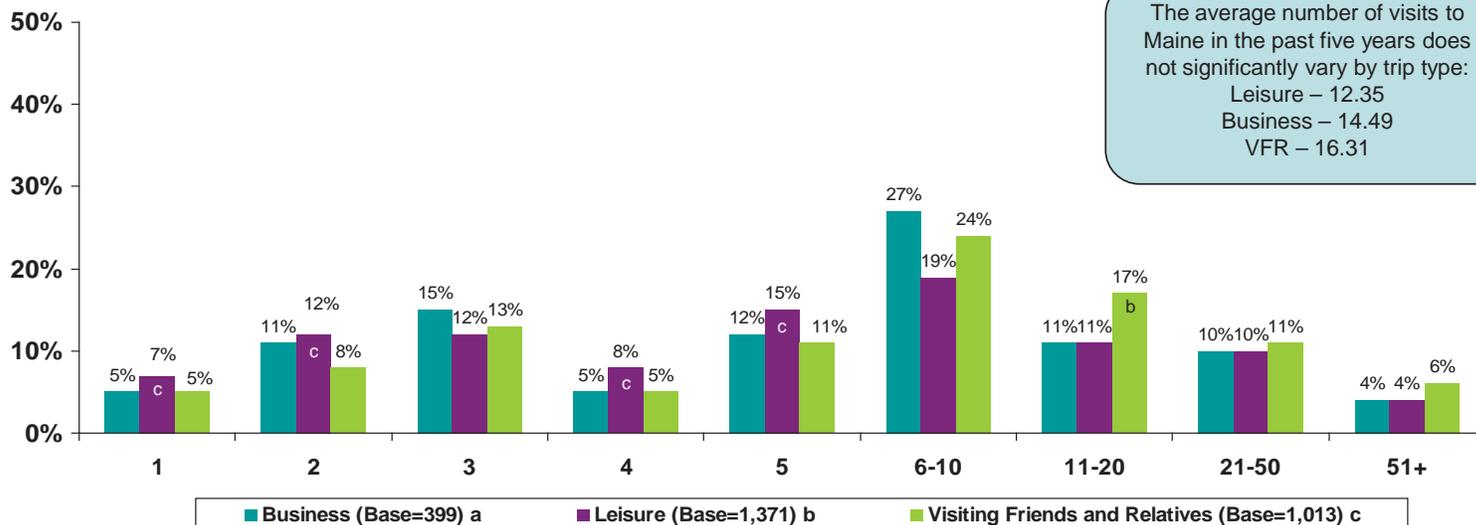


Regional Q11. In what year did you first visit Maine? a,b,c significant difference at 95% confidence level

# Number of Maine Visits by Trip Type

- The average number of trips taken to Maine in the past five years does not significantly vary by trip type. However, overnight leisure visitors are significantly more likely than VFR visitors to report that their most recent trip to Maine was their first or second trip to the state.

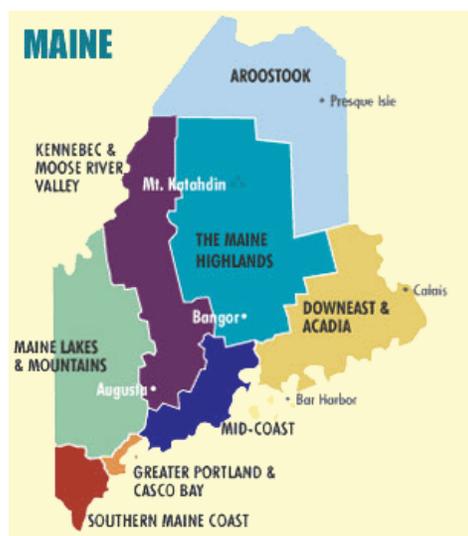
Visits in Maine Over Past Five Years  
Overnight Visitors



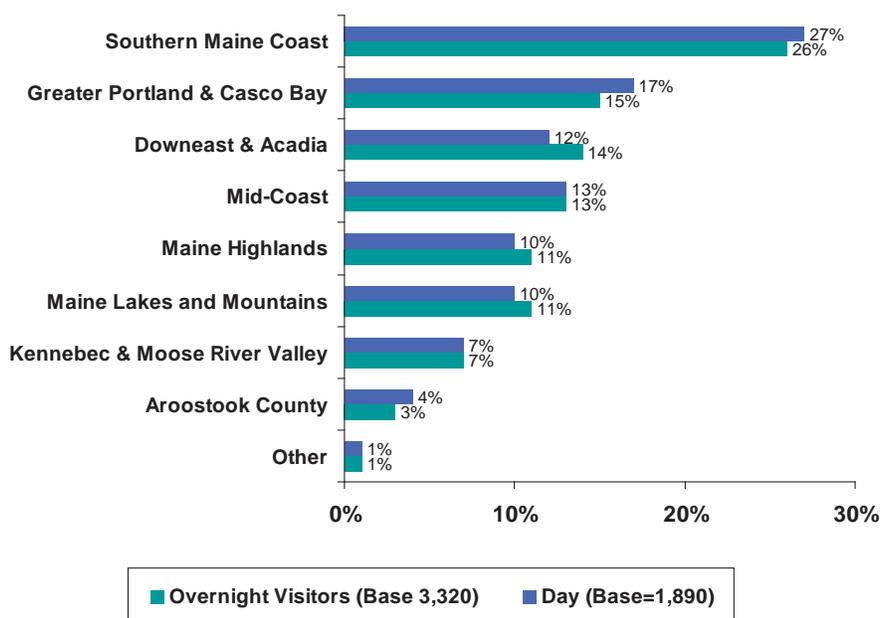
The average number of visits to Maine in the past five years does not significantly vary by trip type:  
 Leisure – 12.35  
 Business – 14.49  
 VFR – 16.31

# Regions Visited within Maine

- Across 2008, the Southern Maine Coast had the greatest percentage of both day and overnight visitors. This region was followed by Greater Portland and Downeast/Acadia.

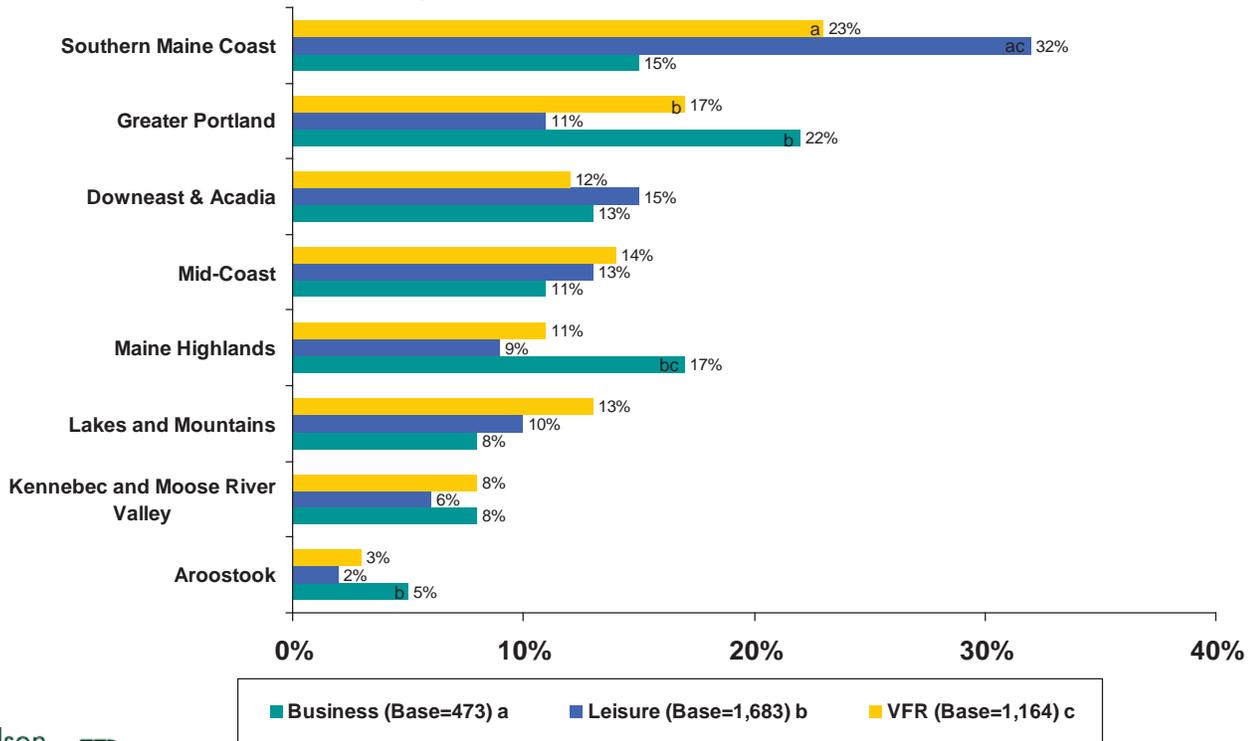


**Primary Region Visited Within Maine  
Net 2008**



# Primary Region by Trip Type: Overnight Visitors

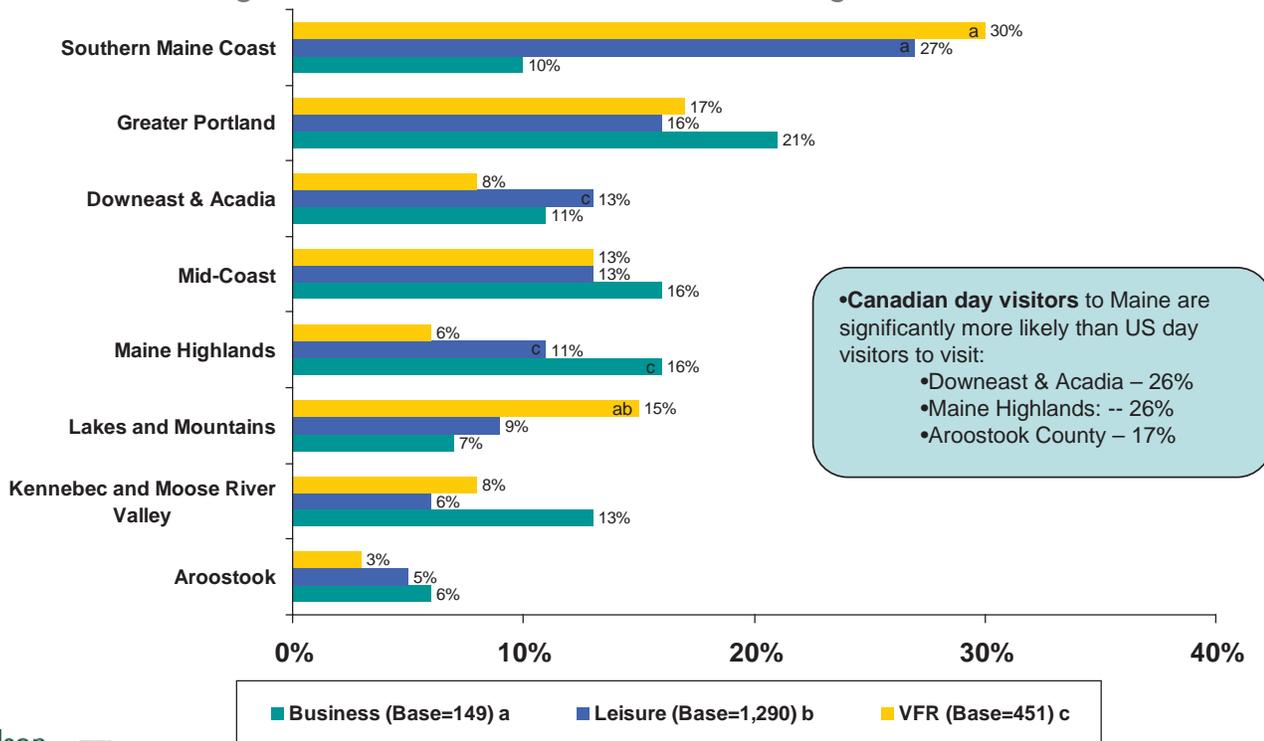
- Overnight leisure visitors are significantly more likely than business or VFR visitors to visit the Southern Maine Coast region as their primary destination.
- At the same time, overnight leisure visitors are significantly less likely than business or VFR visitors to have the Greater Portland region as the primary destination for their trip.



Regional Q28. What region in Maine was your primary destination? a,b,c significant difference at 95% confidence level

# Primary Region by Trip Type: Day Visitors

- Both leisure and VFR day visitors are significantly more likely than business day visitors to have the Southern Maine Coast region as their primary destination.
- Due to proximity to home, Canadian day visitors tend to have different primary regions than US day visitors. Canadians are significantly more likely than US visitors to go to Downeast/Acadia, the Maine Highlands, and Aroostook County.



## Regions Visited within Maine

- More overnight visitors went to the Southern Maine Coast region in the summer as opposed to the winter. Conversely, the percentage of day visitors who visited Southern Maine was statistically stable across the year.
- Downeast/Acadia saw a significantly higher percentage of both overnight and day visitors in the summer as opposed to the fall or winter.

	Overnight Visitors				Day Visitors			
	Net 2008 (n=3320) %	Summer (n=1572) a %	Fall (n=1155) b %	Winter (n=593) c %	Net 2008 (n=1890) %	Summer (n=1269) d %	Fall (n=354) e %	Winter (n=267) f %
Southern Maine Coast	26	30cd	25	19	27	25	29	28c
Portland/Casco Bay	15	14	15	16	17	16	19	19
Maine Lakes and Mountains	11	10	10	14f	10	10	13f	8
Mid-Coast	13	14c	12	10	13	14	12	11
Kennebec & Moose River Valleys	7	5	8	7	7	5	8	11cd
The Maine Highlands	11	7	13ae	18af	10	10a	7	12e
Downeast & Acadia	14	16bc	12e	12f	12	14ef	7	7
Aroostook	3	2	3	4	4	5a	5	3

# Primary and Secondary Regions Visited: Overnight Visitors

- Many of each region's primary visitors reported that they also visited other regions in Maine during their stay. The top secondary region for each primary region tended to cluster by geographic proximity to the primary region.

Percent of region's primary visitors who visited each other region of Maine

Other Regions Visited:	Primary Region Visited by Overnight Visitor							
	S. Maine Coast (n=875)	Greater Portland (n=487)	Lakes and Mtns. (n=360)	Mid-Coast (n=427)	Kenn. & Moose River Valleys (n=221)	Highlands (n=361)	Downeast & Acadia (n=455)	Aroostook (n=97*)
Southern Maine Coast		35%	23%	29%	16%	19%	23%	12%
Portland/Casco Bay	31%		21%	37%	19%	12%	21%	13%
Maine Lakes and Mountains	8%	10%		7%	10%	14%	6%	13%
Mid-Coast	13%	20%	16%		22%	23%	29%	14%
Kennebec & Moose River Valley	4%	4%	11%	7%		15%	8%	36%
The Maine Highlands	5%	7%	10%	9%	24%		25%	32%
Downeast & Acadia	9%	7%	8%	20%	9%	28%		18%
Aroostook	1%	2%	2%	1%	4%	14%	4%	
No Other Region	50%	41%	37%	30%	34%	26%	28%	29%

Regional Q28. What region in Maine was your primary destination?

Regional Q29. What other regions, if any, did you visit while you were in Maine?

Circles indicate top secondary region visited for each primary region.

\*Please note small sample size, data for this area should be used for directional purposes only.

# Primary and Secondary Regions Visited: Overnight Leisure Visitors

- Overnight leisure visitors have similar secondary region visitation patterns as the aggregate group of overnight visitors to the state.

Percent of region's primary visitors who visited each other region of Maine

Other Regions Visited:	Primary Region Visited by Overnight Leisure Visitor							
	S. Maine Coast (n=561)	Greater Portland (n=202)	Lakes and Mtns. (n=187)	Mid-Coast (n=227)	Kenn. & Moose River Valleys (n=99*)	Highlands (n=181)	Downeast & Acadia (n=282)	Aroostook (n=41*)
Southern Maine Coast		39%	20%	31%	14%	21%	28%	14%
Portland/Casco Bay	31%		16%	40%	11%	16%	24%	15%
Maine Lakes and Mountains	7%	11%		6%	14%	13%	5%	19%
Mid-Coast	14%	24%	17%		22%	20%	34%	19%
Kennebec & Moose River Valley	5%	2%	14%	6%		15%	8%	48%
The Maine Highlands	4%	8%	11%	10%	28%		20%	34%
Downeast & Acadia	8%	11%	10%	25%	9%	33%		18%
Aroostook	1%	3%	3%	1%	4%	20%	4%	
No Other Region	53%	29%	40%	29%	30%	18%	25%	19%

Regional Q28. What region in Maine was your primary destination?

Regional Q29. What other regions, if any, did you visit while you were in Maine?

Circles indicate top secondary region visited for each primary region.

\*Please note small sample sizes, data for these areas should be used for directional purposes only.

# Top City/Town Combinations Among Visitors

- While there are many unique combinations of locations visited within Maine, there are some combinations of destinations that are visited together more frequently than others.
- Most of the combinations that appeared most frequently are located in Southern Maine, such as trips centered around Portland or Kittery and including some surrounding destinations.

## Overnight Visitors

Combination	% of Trips
Acadia National Park – Bar Harbor	0.6
Kittery – York	0.5
Kittery – Ogunquit – Wells – York	0.4
Ogunquit – Wells	0.4
Portland – South Portland	0.4
Ogunquit – Wells – York	0.4
Freeport – Portland	0.3
Kennebunk – Kennebunkport	0.3
Kennebunkport – Kittery – Ogunquit – Wells – York	0.3
Kittery – Ogunquit	0.3
Old Orchard Beach – Saco	0.3

## Day Visitors

Combination	% of Trips
Kittery – York	1.7
Portland – South Portland	1.6
Freeport – Portland	0.9
Freeport – Portland – South Portland	0.8
Kittery – Ogunquit	0.7
Augusta – Waterville	0.6
Portland – Scarborough – South Portland	0.5
Kittery – Ogunquit – Wells – York	0.5
Kittery – Wells – York	0.5
Portland – Scarborough	0.5
Kennebunkport – Kittery	0.5
Ogunquit – York	0.5

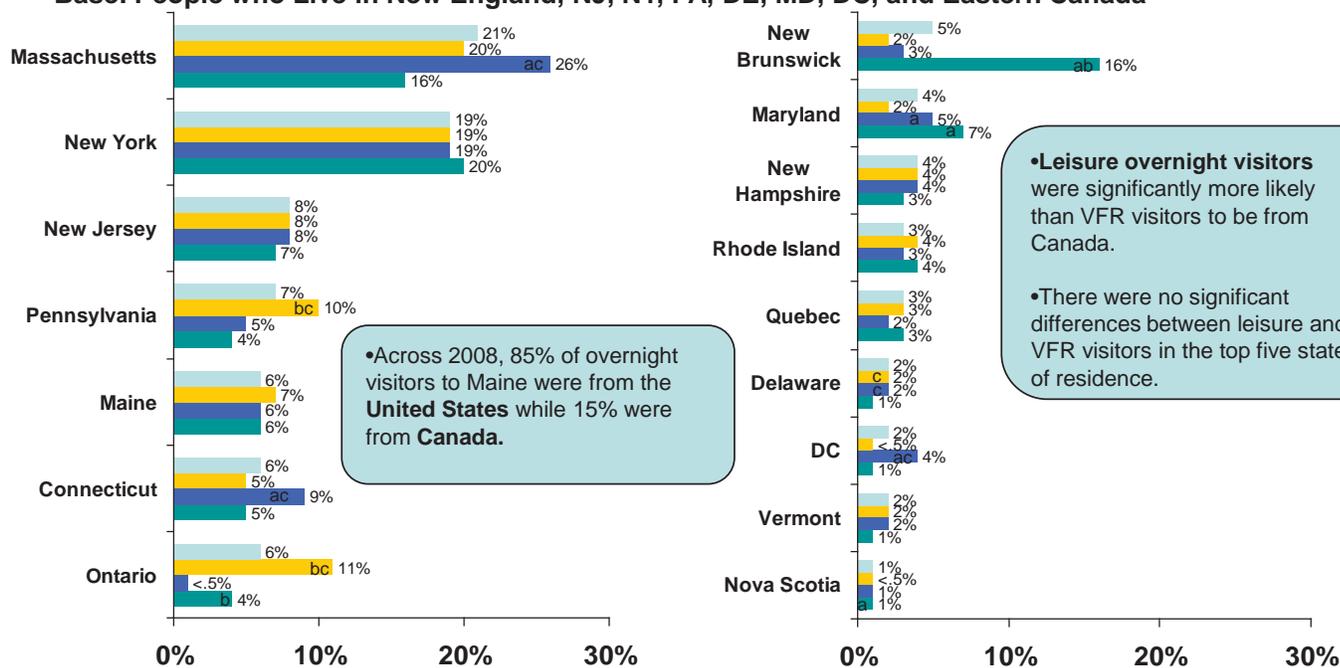
# The Maine Visitor Experience: Trip Details



# Residence of Maine Overnight Visitors

- The largest percentage of overnight visitors to Maine come from Massachusetts or New York.
- Fall attracts a significantly greater percentage of visitors from Massachusetts and Connecticut than do the other seasons.
- Summer attracts a greater percentage of visitors from Pennsylvania, and Ontario while winter attracts more people from New Brunswick.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada



•Across 2008, 85% of overnight visitors to Maine were from the United States while 15% were from Canada.

•Leisure overnight visitors were significantly more likely than VFR visitors to be from Canada.  
 •There were no significant differences between leisure and VFR visitors in the top five states of residence.

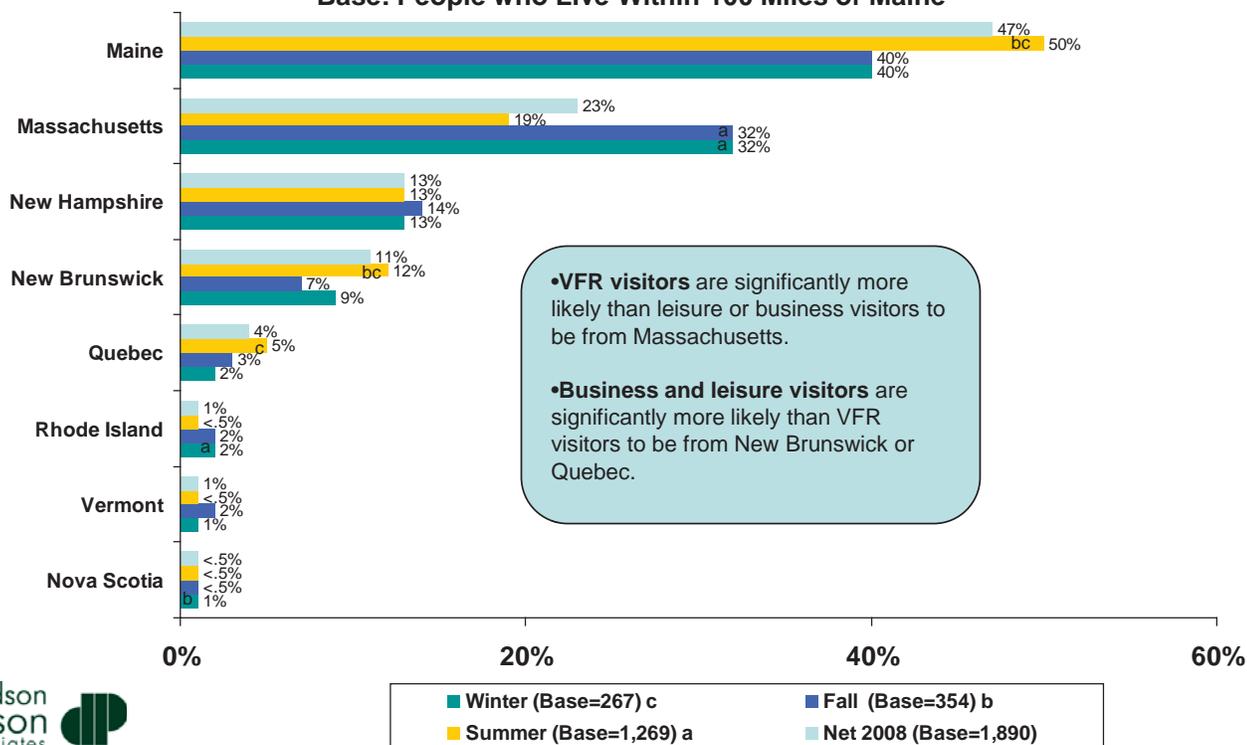


State/Province of residence. a, b, c significant difference at 95% confidence level

# Residence of Maine Day Visitors

- Day visitors from Maine make up the largest percentage of all day visitors to the state.
- Half of summer day visitors to Maine are from the state – a significantly higher percentage than in any other season.
- One-third of fall and winter day visitors to Maine are from Massachusetts – a significantly higher percentage than those who are from MA in the summer season.

Base: People who Live Within 100 Miles of Maine



## Travel Party Size to Maine

- **Overnight Visitors:** The average travel party size (including children) is 2.71 – a number which did not significantly change across the seasons.

- Travel party size did significantly vary by trip type:
  - Leisure – 2.99 (significantly greater than business and VFR)
  - VFR – 2.69 (significantly greater than business)
  - Business – 1.75

•31% of **Summer overnight visitors** traveled with at least one child – significantly more than fall overnight visitors.

•36% of **Summer day visitors** traveled with at least one child, also significantly higher than fall or winter day visitors.

- **Day Visitors:** The average party size for day visitors for 2008 was 2.75, with summer being the highest at 2.90, significantly higher than both fall (2.42), and winter (2.48).

- As with overnight visitors, party size varied by trip type:
  - Leisure – 2.90 (significantly greater than business and VFR)
  - VFR – 2.58 (significantly greater than business)
  - Business – 1.91

*Regional Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip in Maine? Regional Q25. How many of these people were children?*

*Day Q7. Including yourself and any children, how many people were in your immediate travel party on this trip? Day Q8. How many of these people were children?*

### •Traveling with children by trip type:

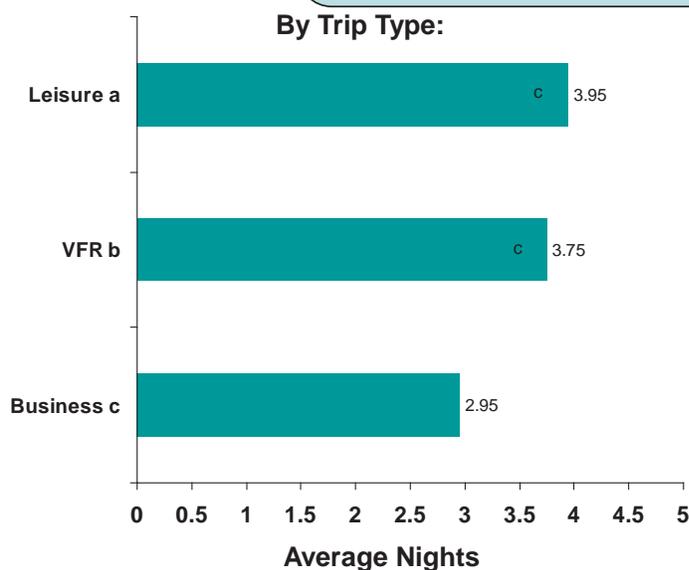
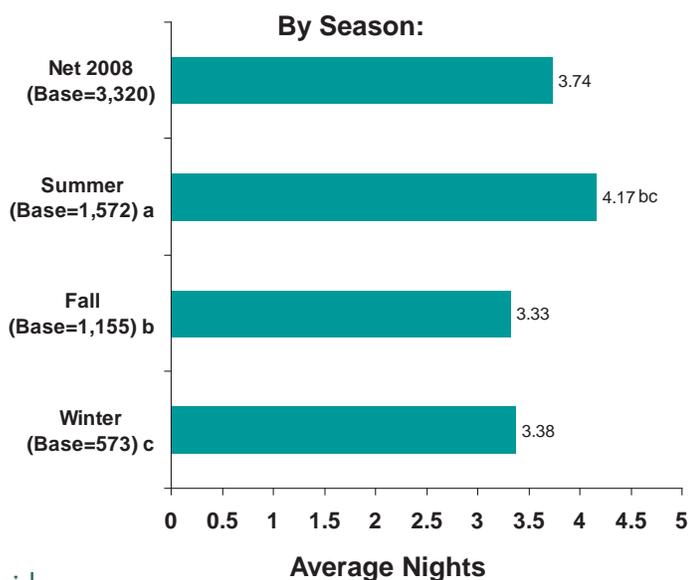
Overnight:	Day:
Leisure – 30%	Leisure – 37%
VFR – 28%	VFR – 43%
Business – 9%	Business – 10%

# Length of Stay in Maine

- Overnight visitors from Canada and those visiting from outside of New England stay significantly more nights on average than visitors from Maine or other parts of New England.
- The length of stay in a visitor's primary region did not significantly vary by the primary region visited within Maine.

•The average overnight visitor from **Canada** as well as the average overnight **US** visitor from **Outside of New England** stay an average of 4.24 nights, compared to 2.8 nights spent by Maine residents and 3.13 nights spent by other New Englanders.

The number of nights away from home while on this trip in Maine

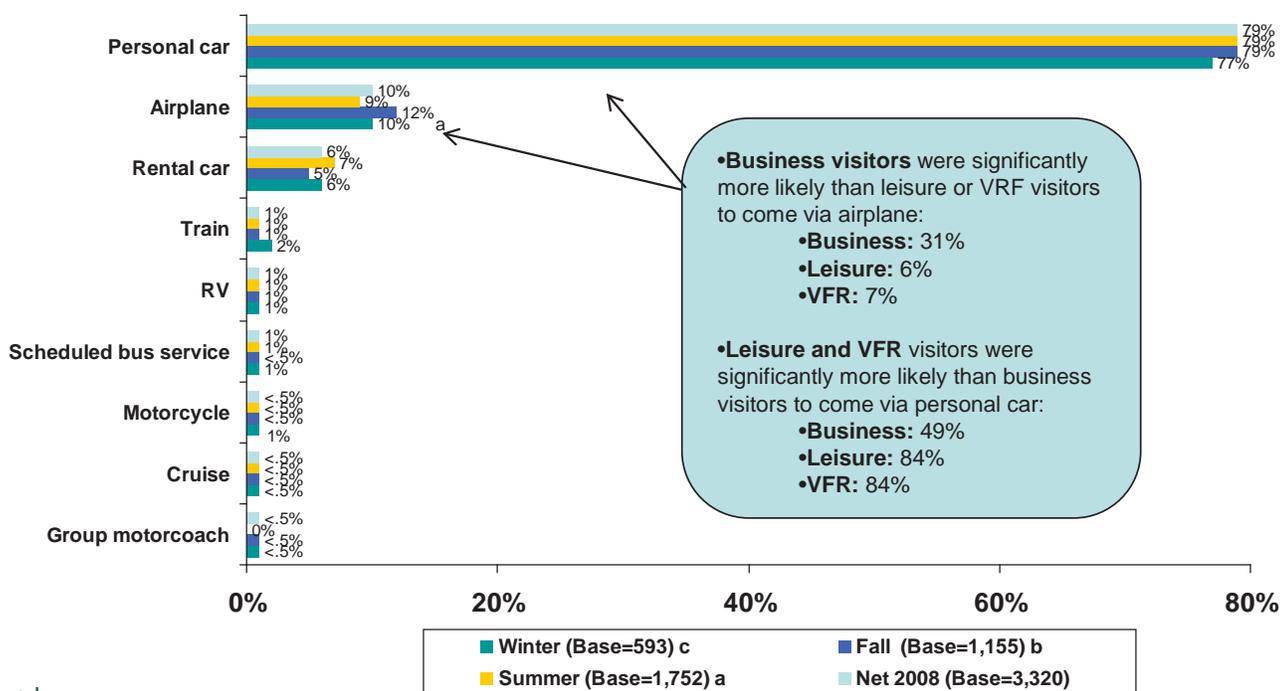


Regional Q8. On this trip to Maine, how many nights were you away from home?  
 Regional Q30. How many nights did you spend in the region(s) you visited?  
 a,b,c, significant difference at the 95% confidence level

# How Overnight Visitors Traveled to Maine

- Across the seasons, the vast majority of overnight visitors to Maine took their personal cars to travel to the state.
- While overnight business travelers were significantly more likely than leisure or VFR travelers to fly to Maine, a greater percentage of overnight business travelers took their personal car as opposed to flying to Maine.

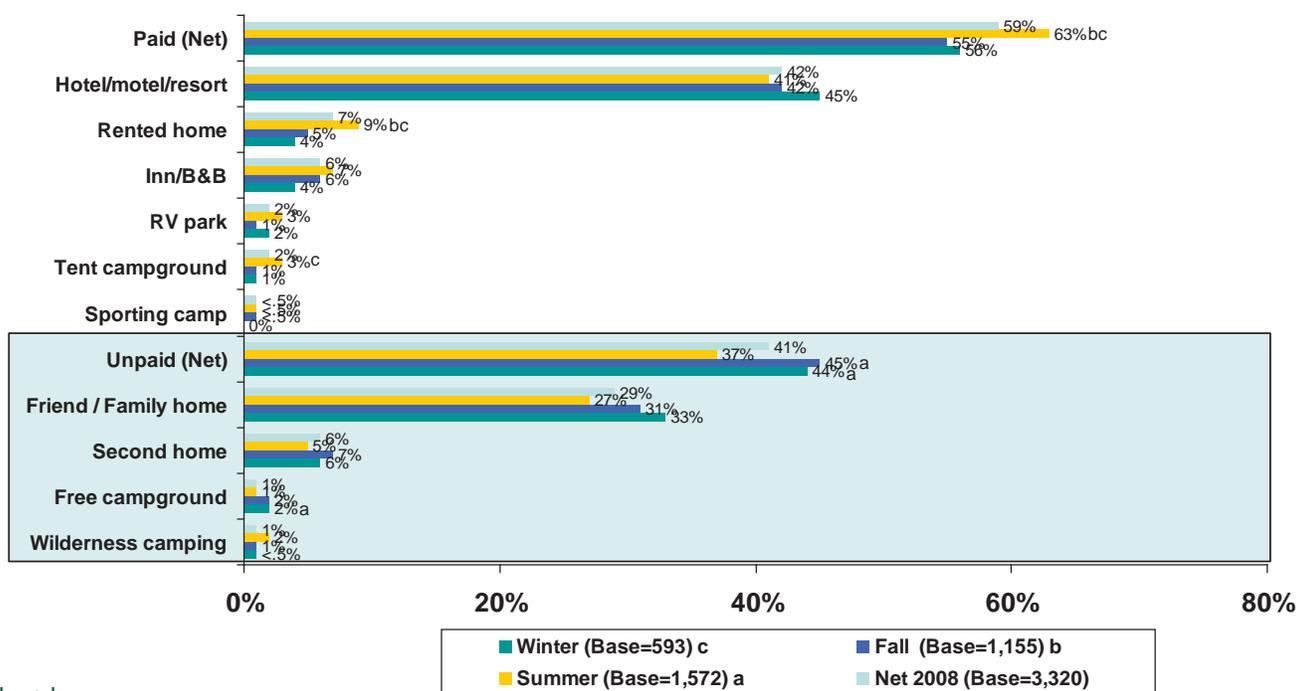
**Primary Transportation Source to Maine**



# Accommodation Type In Maine

- Across the seasons, the most used accommodation types among overnight visitors included hotels/motels/resorts and friend/family homes.
- The percentage of overnight visitors who stayed in paid accommodations was significantly higher in the summer versus the other seasons.
- The percent of overnight visitors who stayed in rented homes also peaks in the summer.

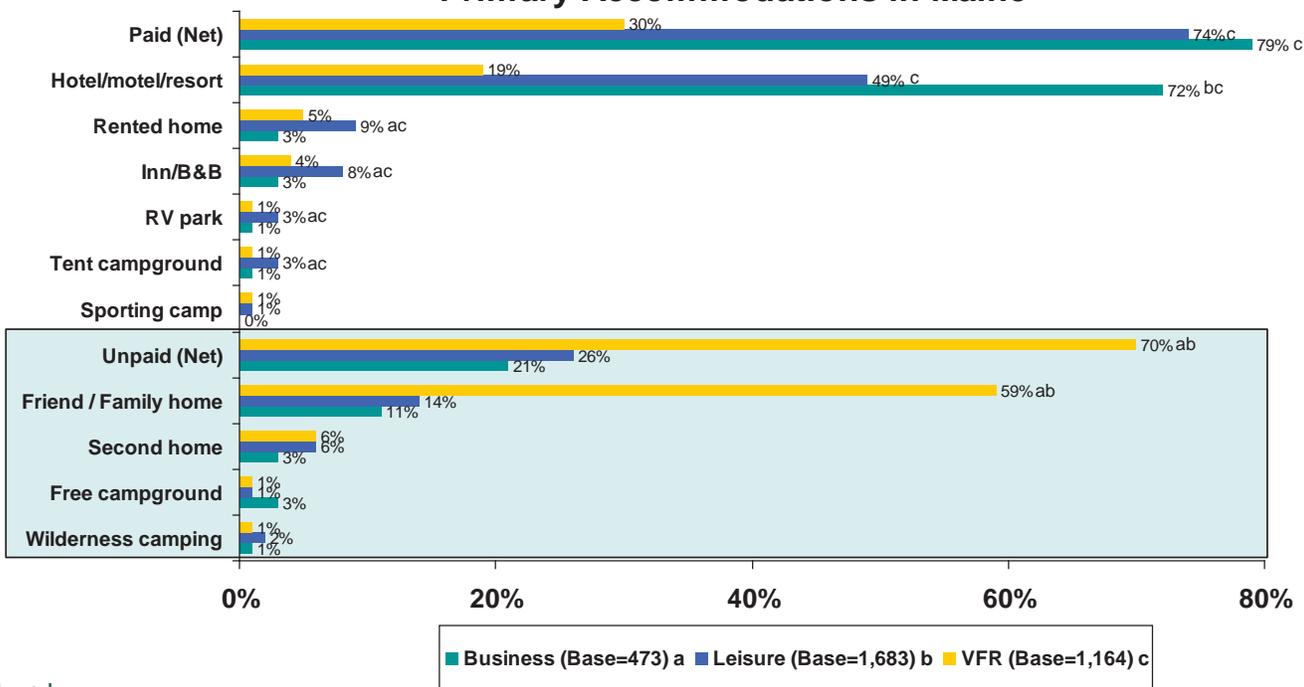
**Primary Accommodations in Maine**



# Accommodation Type In Maine by Trip Type

- Business and leisure visitors are significantly more likely than VFR visitors to use paid accommodations.
- Leisure visitors are significantly more likely than business or VFR visitors to stay in: a rented home, an Inn/B&B, an RV park, or a tent campground. Meanwhile, business visitors are more likely than leisure and VFR visitors to stay in hotels.

**Primary Accommodations in Maine**



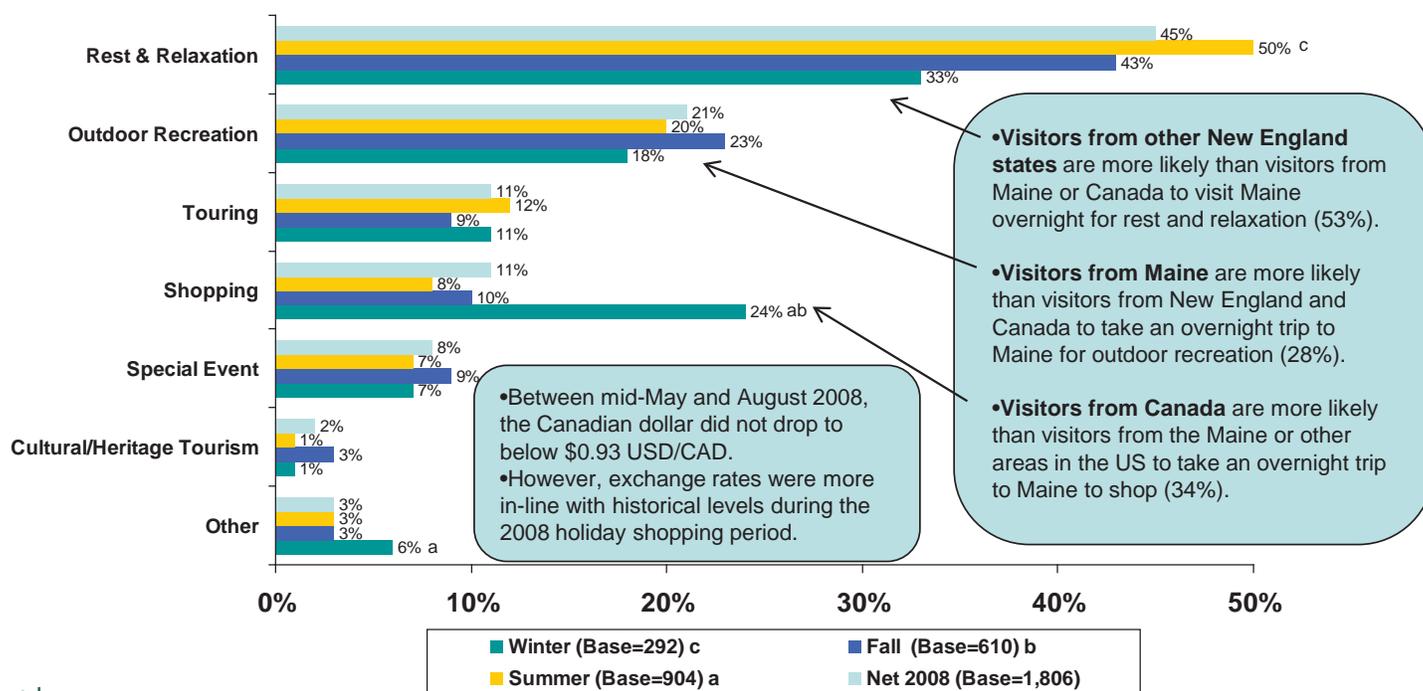
# The Maine Visitor Experience: Primary Purpose of Trip



# Primary Purpose of Overnight Leisure Trips

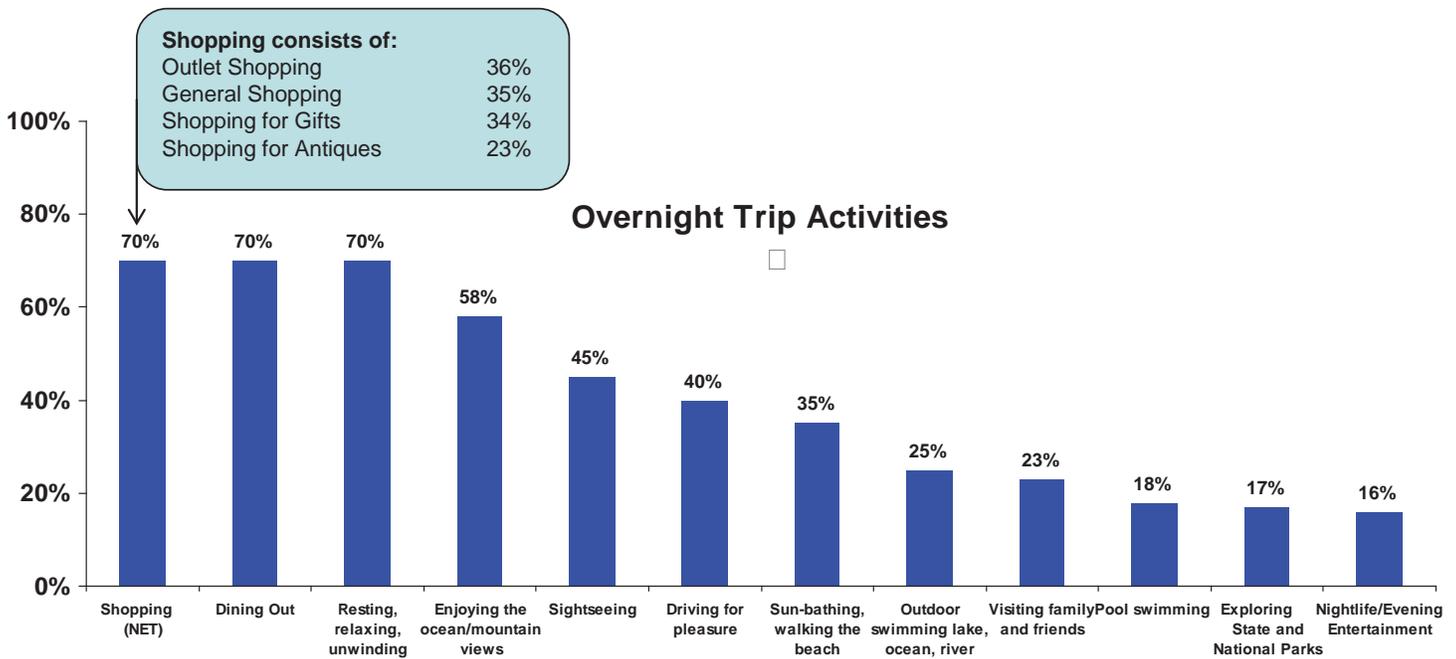
- Rest and relaxation was the primary purpose of overnight leisure trips to Maine.
- However, it's interesting to note that shopping was the most likely primary purpose cited by Canadian visitors. It's important to keep in mind that the exchange rate was particularly favorable for Canadian visitors throughout a large period in 2008, with the Canadian dollar frequently on-or-near par with the US dollar.

Primary Purpose of Overnight Leisure Trips



# Trip Activities Among Those who Want to Rest and Relax

- Shopping, dining out, and resting were the top trip activities among overnight visitors to Maine who said that the primary purpose of their trip was rest and relaxation.
- A second tier of trip activities for this group includes enjoying the views, sightseeing, driving for pleasure, and sunbathing.



Base= 810; Leisure travelers with Rest & Relaxation as primary trip purpose.



## Primary Purpose of Overnight Leisure Trip

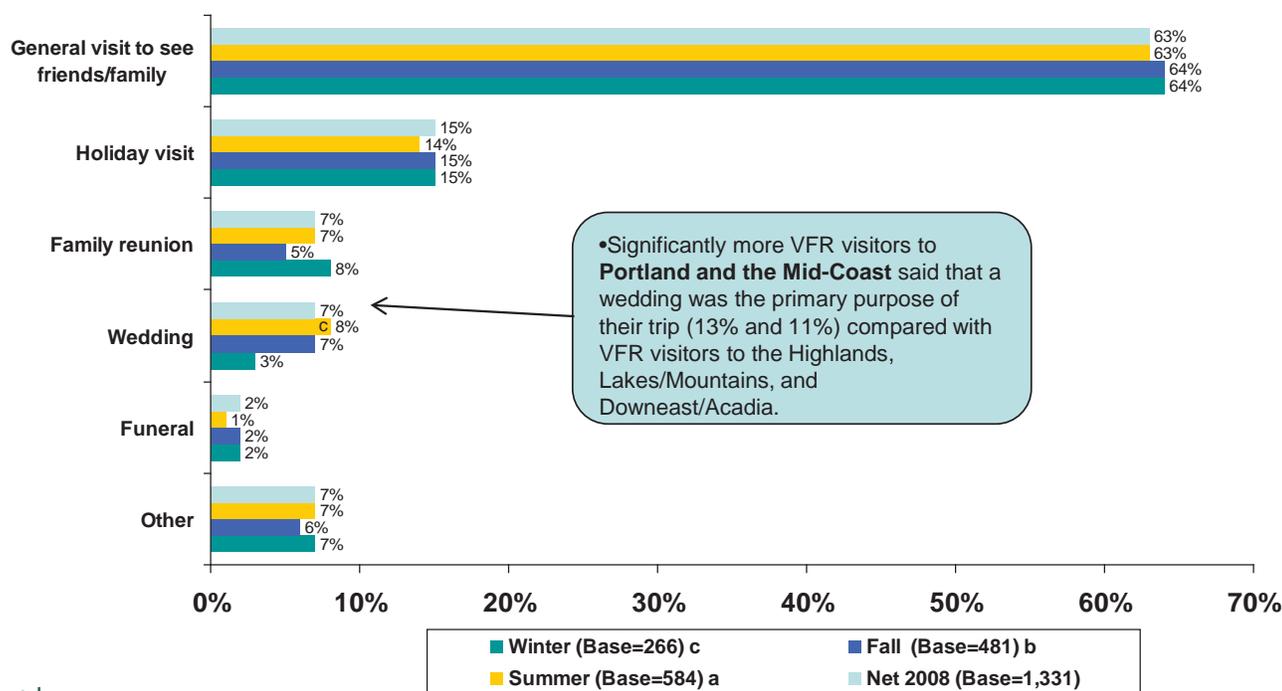
- Each Maine region stands out among others for the primary purpose of overnight leisure visits. For example, Southern Maine and the Mid-Coast regions have a significantly higher percentage of overnight visitors that cite rest and relaxation as their primary trip purpose.
- In contrast, Downeast/Acadia and Aroostook lead most regions for touring, the Kennebec region leads most regions for outdoor recreation, and the Highlands leads most regions for the highest percentage of overnight leisure visitors whose primary purpose is to shop.

	Primary Region Visited							
	Aroostook (n=41*) a	Kennebec (n=99*) b	Highlands (n=181) c	Lakes/ Mountains (n=187) d	Downeast/ Acadia (n=282) e	Mid- Coast (n=227) f	Greater Portland (n=202) g	S. Maine Coast (n=561) h
Rest & relaxation	22%	33%	28%	38%	32%	54% abcde	40%	60% abcdeg
Outdoor recreation	13%	46% acfgh	25% fh	34% fgh	32% fgh	11%	14%	12%
Touring	30% bcd fgh	4%	9%	11%	25% bcd fgh	8%	8%	6%
Shopping	26%	7%	27% bde f h	4%	5%	5%	15% de	12% de
Special event	3%	5%	6%	7%	1%	13% e	18% abcde h	7% e
Cultural/ Heritage	3%	<1%	1%	3%	1%	2%	1%	2%
Other	3%	4%	3%	2%	4%	7% h	4%	2%

# Primary Purpose of Overnight VFR Trips

- Most overnight VFR visitors to Maine report that the primary reason for their trip is a general visit to see friends and family.
- Visits for the holidays are a distant second among the primary reasons for an overnight VFR trip.

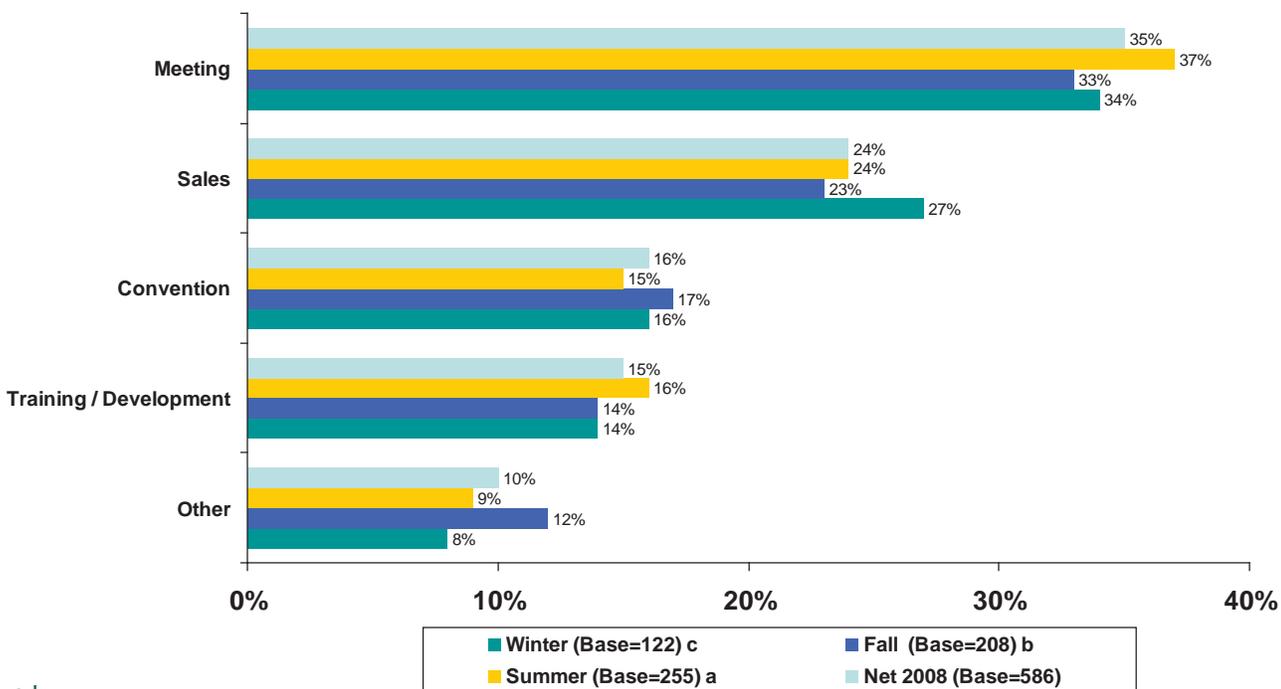
Primary Purpose of Overnight VFR Trips



# Primary Purpose of Overnight Business Trips

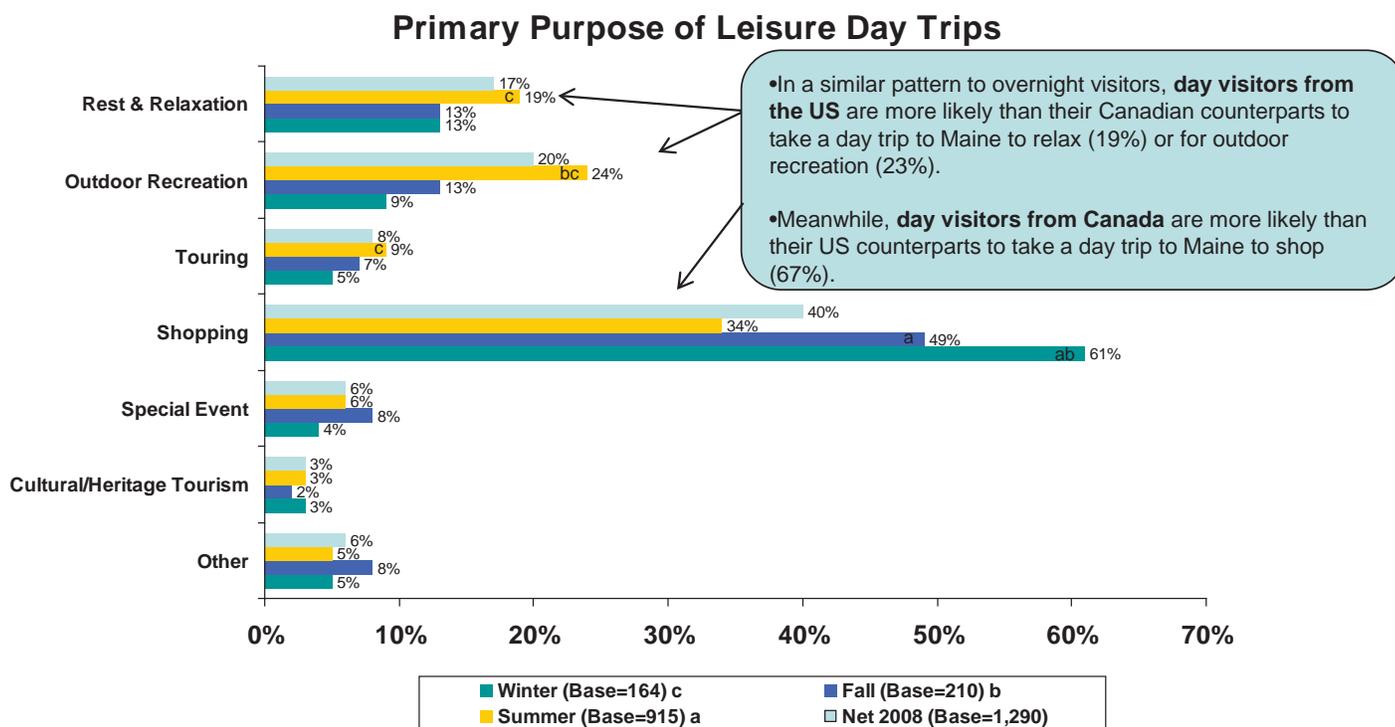
- The most widely cited purpose for overnight business travel to Maine was a meeting.
- However, the reasons given for business travel was scattered across meetings, sales, conventions, and training sessions. There was no clear dominant primary purpose given for overnight business travel to Maine as there was with leisure or VFR trips.

**Primary Purpose of Overnight Business Trips**



# Primary Purpose of Leisure Day Trips

- Canadians' attraction to shopping in Maine is also underscored by the primary purpose of leisure day trips to the state. While one-third of US residents report that shopping was the primary purpose of their leisure day trip, two-thirds of Canadians report this to be the case.



## Primary Purpose of Leisure Day Trips

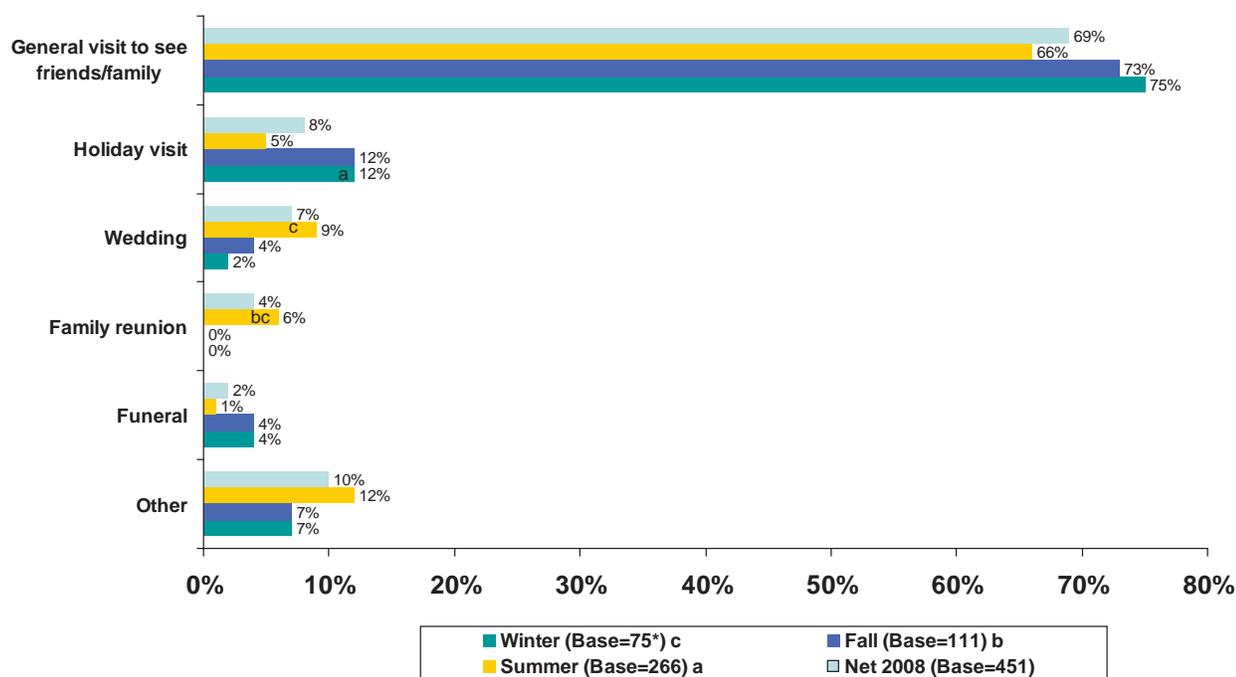
- The specific regions that stand out for different activities differs between day and overnight trips. For example:
  - The Lakes/Mountains region stood out for outdoor recreation among day trippers versus the Kennebec region for overnight visitors.
  - Aroostook stood out for shopping among day trippers versus the Highlands for overnight visitors.

	Primary Region Visited							
	Aroostook (n=61*) a	Kennebec (n=71*) b	Highlands (n=138) c	Lakes/ Mountains (n=113) d	Downeast/ Acadia (n=166) e	Mid- Coast (n=164) f	Greater Portland (n=210) g	S. Maine Coast (n=352) h
Rest & relaxation	4%	21% a	12%	14%	26% acfg	13%	12%	23% acfg
Outdoor recreation	8%	30% ag	19%	44% acefgh	19%	27% ag	9%	18% g
Touring	3%	1%	6%	14% b	14% b	9% b	6%	7% b
Shopping	78% bcdefgh	38% d	52% df	15%	36% d	24%	48% df	41% df
Special event	0%	2%	3%	5%	2%	17% bcdeh	10% e	4%
Cultural/ Heritage	4%	1%	0%	4%	1%	7% eh	6% eh	<.5%
Other	3%	6%	6%	5%	1%	5%	9% e	7% e

# Primary Purpose of VFR Day Trips

- Across the year – the primary purpose of VFR trips is to have a general visit with friends and family.
- Summer was the only season where day visitors mentioned that they visited Maine for a family reunion.
- Fall and winter were more popular among VFR day visitors to visit family and friends for the holidays.

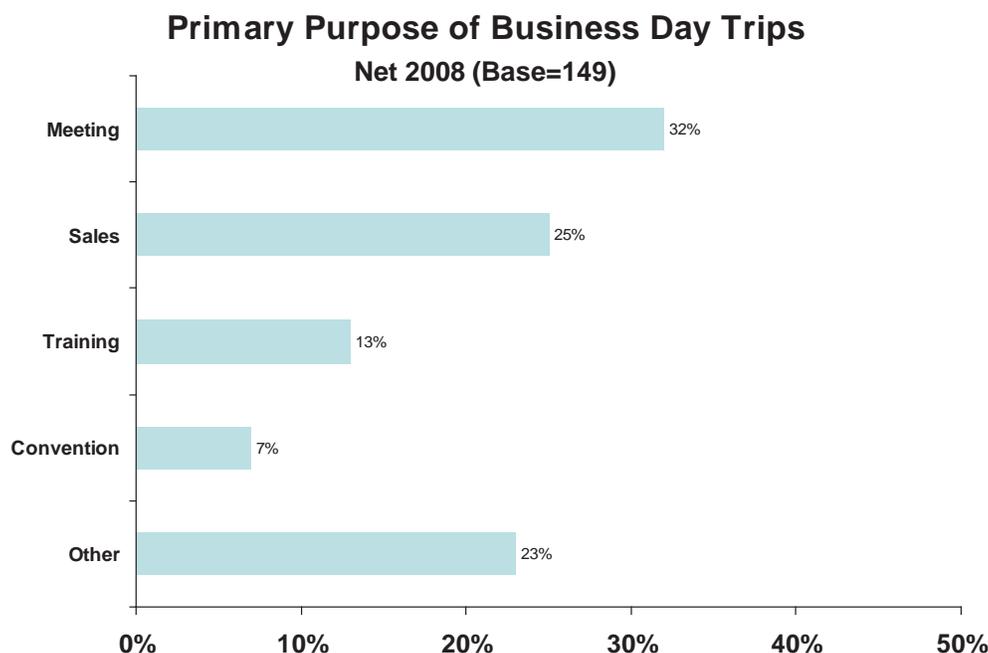
Primary Purpose of VFR Day Trips



Day Q3. What was the primary purpose of your most recent trip to visit friends or relatives in Maine? a,b,c significant difference at 95% confidence level. \*Please note small sample sizes, data for these areas should be used for directional purposes only.

## Primary Purpose of Business Day Trips

- As with overnight business trips to Maine, meetings are the primary purpose for approximately one-third of business day trips to the state.
- Also in a similar pattern to overnight day trips to Maine, there was no dominant primary purpose given among the population who took a business day trip to Maine.

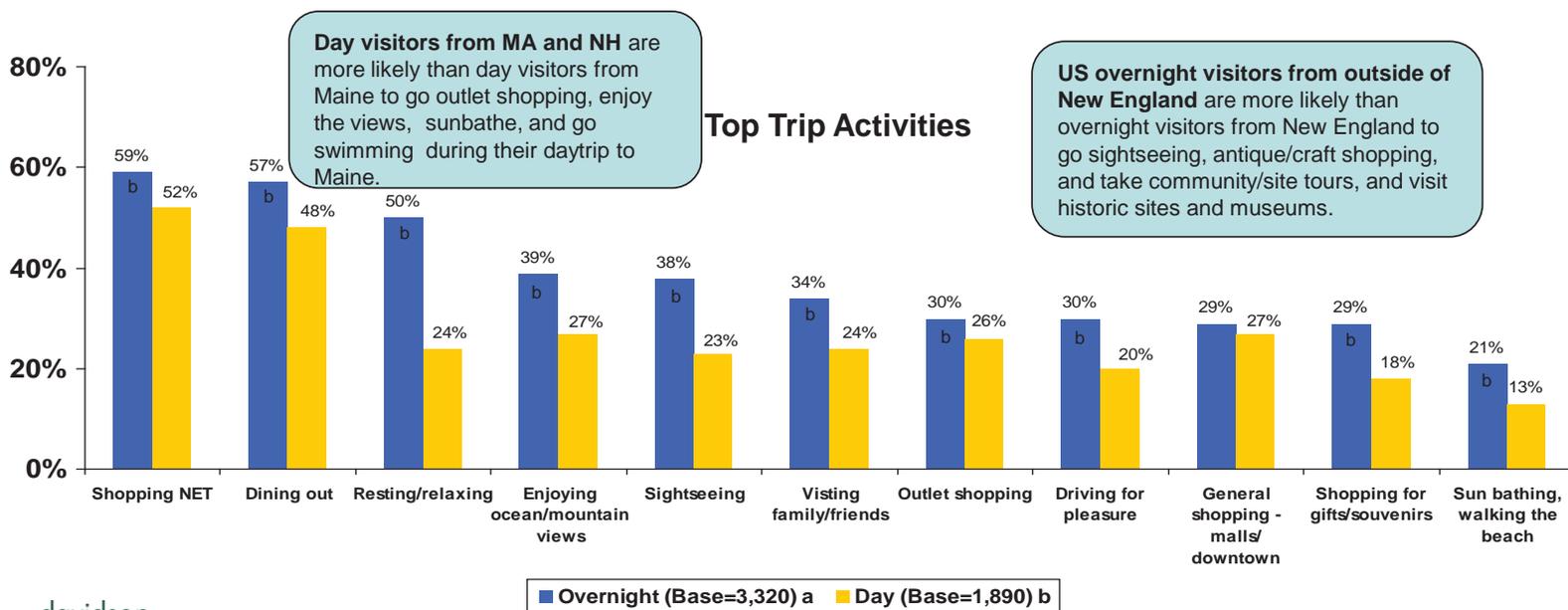


# The Maine Visitor Experience: Trip Activities



# Trip Activities

- In accordance with the primary purpose of their trip, Canadian visitors stand out relative to their US counterparts when it comes to shopping in Maine:
  - Three-quarters of Canadian day and overnight visitors shopped during their visit to Maine compared to about half of US visitors.
  - Shopping in malls/downtown was the most widely cited type of shopping among Canadian visitors, followed by outlet shopping.



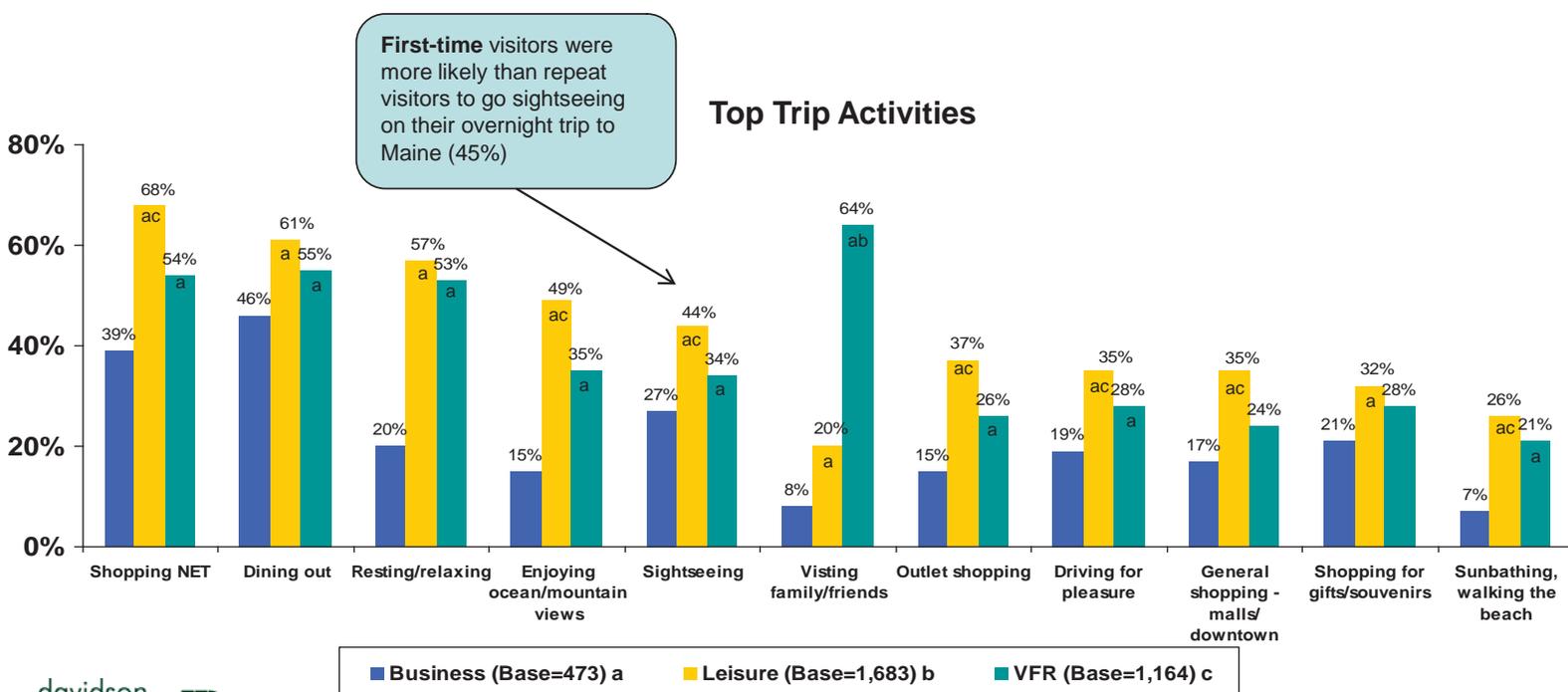
## Overnight Visitor Trip Activities

- Overnight visitors to Downeast/Acadia, the Mid-Coast, and Southern Maine regions are more likely than visitors to multiple other regions to appear more engaged in a variety of activities.

	Primary Region Visited							
	Aroostook (n=97*) a	Kennebec (n=221) b	Highlands (n=361) c	Lakes/ Mountains (n=360) d	Downeast/ Acadia (n=455) e	Mid-Coast (n=427) f	Greater Portland (n=487) g	S. Maine Coast (n=875) h
Shopping (NET)	41%	37%	52% b	45%	63% abd	63% abcd	59% abd	71% abcdg
Dining out	44%	49%	48%	49%	57%	64% abcd	57%	62% abcd
Resting/ Relaxing	32%	39%	42%	52% ab	55% abcg	57% abcg	43%	55% abcg
Enjoying views	15%	21%	27%	32% a	48% abcdg	49% abcdg	32% a	50% abcdg
Sightseeing	26%	24%	37% b	34%	53% abcdgh	44% abg	33%	38% b
Visiting family/ friends	33%	39% c	24%	42% ceh	30%	42% ceh	35% c	30%
Outlet shopping	11%	18%	29% a	24% a	23%	31% ab	30% ab	41% abcdefg
Driving for pleasure	16%	17%	30% b	25%	40% abdg	37% abdg	25%	31% ab
General shopping	15%	14%	29% b	23%	24% b	28% b	33% abd	37% abdef
Shopping for gifts/ souvenirs	14%	13%	19%	27% ab	36% abcg	29% abg	20%	40% acbdg

# Overnight Visitor Trip Activities by Trip Type

- Overnight leisure visitors are significantly more likely than VFR or business visitors to report that they engaged in a variety of activities while in Maine.
- Visiting family and friends is the only activity that VFR overnight visitors are significantly more likely than leisure visitors to engage in while in the state.



## Day Visitor Trip Activities

- As was seen in earlier slides in this section of the report, the Highlands and Aroostook both stand out among the regions when it comes to the percent of day visitors who shopped during their visit. With both of these regions, the primary shopping was in downtown/malls, suggesting high visitation among Canadian visitors.

	Aroostook (n=82*) a	Kennebec (n=128) b	Highlands (n=188) c	Lakes/ Mountains (n=190) d	Downeast/ Acadia (n=220) e	Mid- Coast (n=246) f	Greater Portland (n=318) g	S. Maine Coast (n=502) h
Shopping (NET)	60% bd	40%	62% bdfg	29%	53% d	46% d	49% d	63% bdfg
Dining out	44%	31%	58% bdf	33%	50% bd	44%	49% bd	55% bdf
Resting/ Relaxing	4%	15%	19% a	27% ab	33% abc	24% a	24% a	27% ab
Enjoying views	9%	13%	12%	23% ac	37% abcdg	33% abcg	20%	37% abcdg
Sightseeing	8%	12%	21% a	26% ab	31% abg	28% ab	21% a	23% ab
Visiting family/ friends	14%	34% ac	16%	33% ac	21%	22%	26%	25%
Outlet shopping	15%	8%	29% abd	16%	21% b	19% b	24% b	41% abcdefg
Driving for pleasure	19%	16%	13%	23%	28% cg	20%	16%	23% cg
General shopping	51% bdefgh	28%	42% bdfgh	17%	29% df	17%	28% df	23%
Shopping for gifts/ souvenirs	11%	11%	15%	12%	24% bd	19%	17%	21% bd

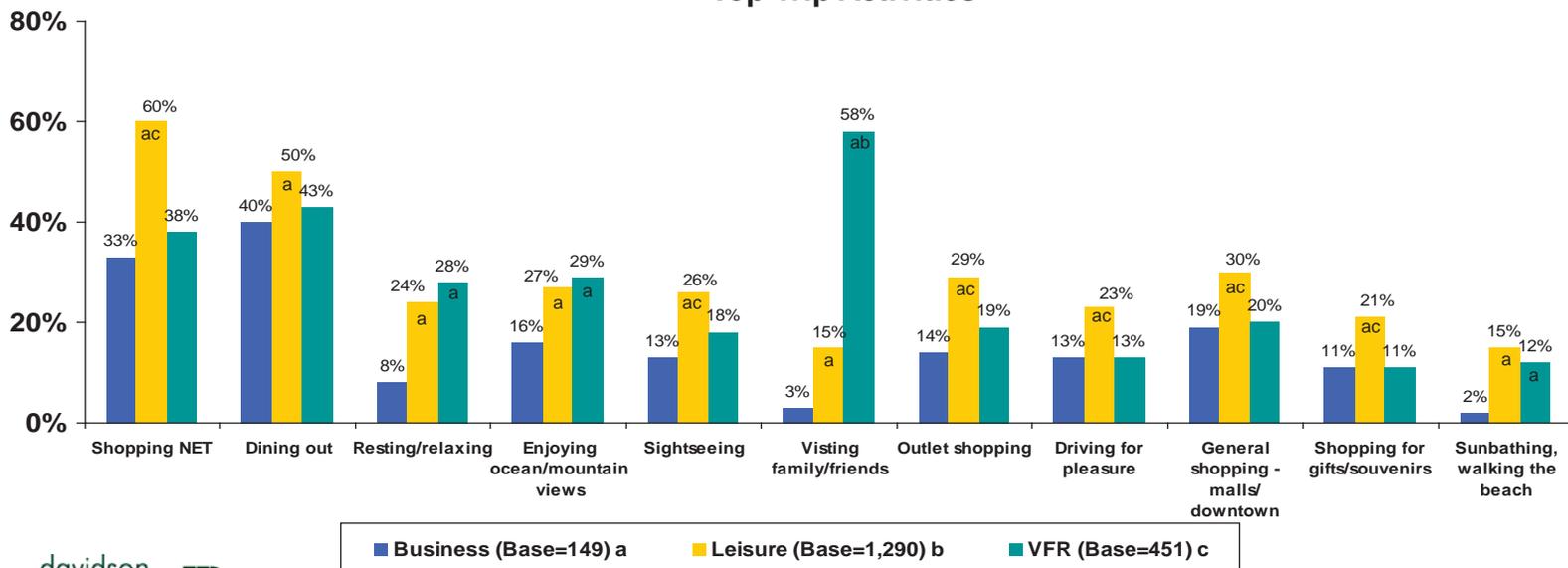
67

Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply)  
a,b,c notes significant difference at 95% confidence level. Data with zero responses (0%) not included in statistical testing. \*Please note small sample size, data for this area should be used for directional purposes only.

# Day Visitor Activities by Trip Type

- Day leisure visitors are significantly more likely than VFR or business day visitors to engage in a variety of activities while in Maine, including shopping, sightseeing, and driving for pleasure.
- In a similar pattern to overnight visitors, day VFR visitors are significantly more likely than either leisure or business travelers to report visiting family and friends.

Top Trip Activities



Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply) a,b,c, notes significant difference at 95% confidence level

# The Maine Visitor Experience: Expenditures

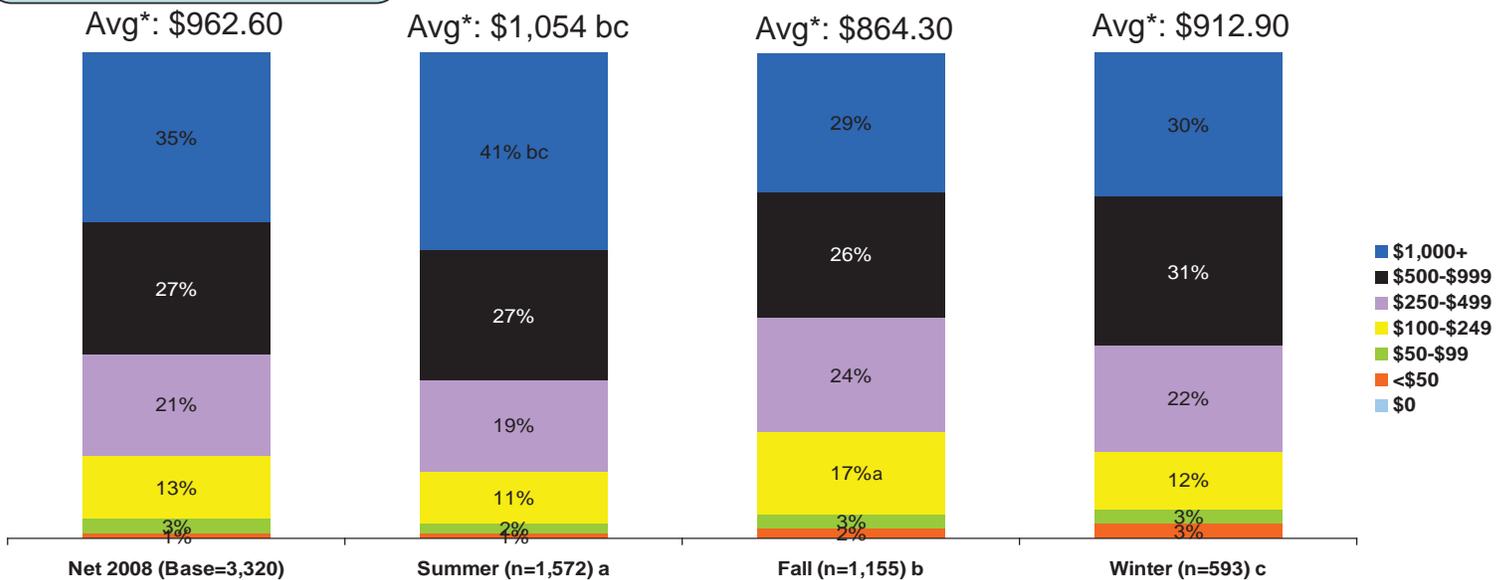


# Overnight Trip Expenditures: Net

- Overnight visitors during the summer spent more in total than visitors in the fall or winter.
- Demographically, young families with relatively high incomes spent more than other demographic groups while in Maine.

Visitors between age 35-44, those with kids, and those with higher incomes spent more in Maine than other demographic groups

## Self-Reported Spending: Total Amount for all Categories



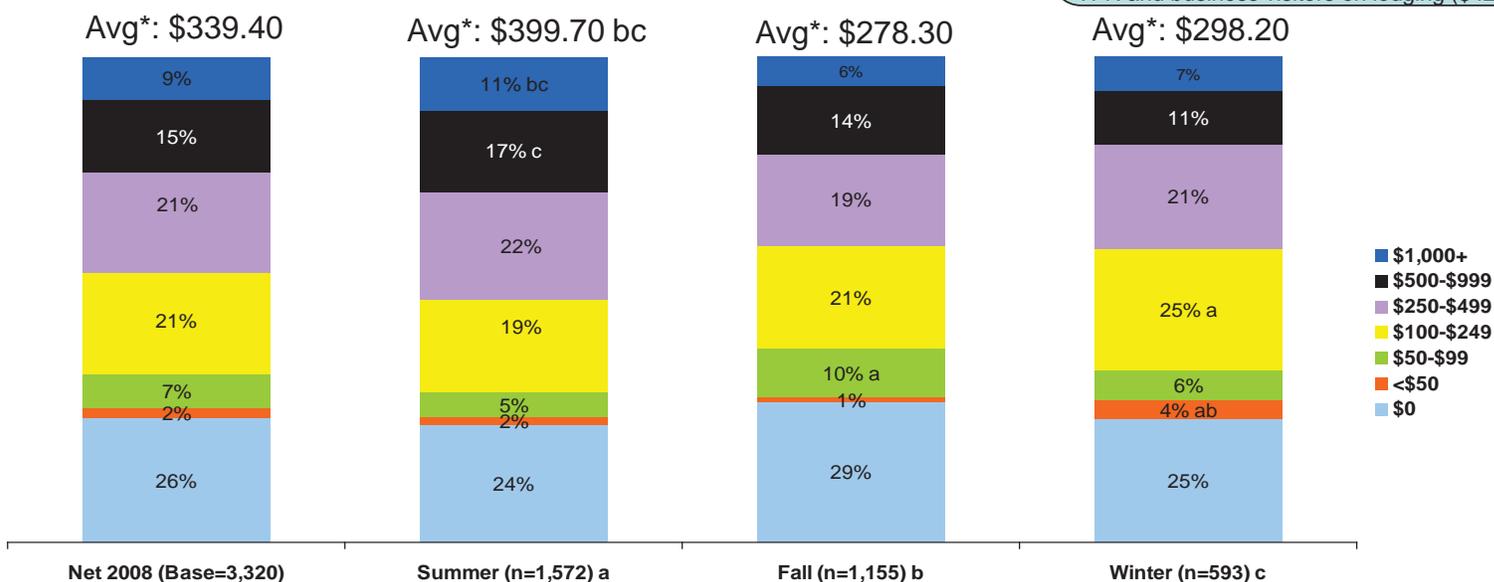
Regional Q33. Please tell us the total amount of money you and your immediate travel party spent on this trip in each of the categories listed below. Net. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero and exclude outliers

# Overnight Trip Expenditures: Lodging

- As with overall spending, summer overnight visitors spent more on lodging than fall and winter overnight visitors.
- Aside from the seasonal variation, Canadian visitors, first-time visitors, and leisure visitors spent more on lodging than other visitors.

**•Canadian visitors** spent significantly more than US visitors on their lodging (\$470)  
**•First time visitors** spend significantly more than repeat visitors on lodging (\$422)  
**•Leisure visitors** spent significantly more than VFR and business visitors on lodging (\$420)

## Self-Reported Spending: Lodging



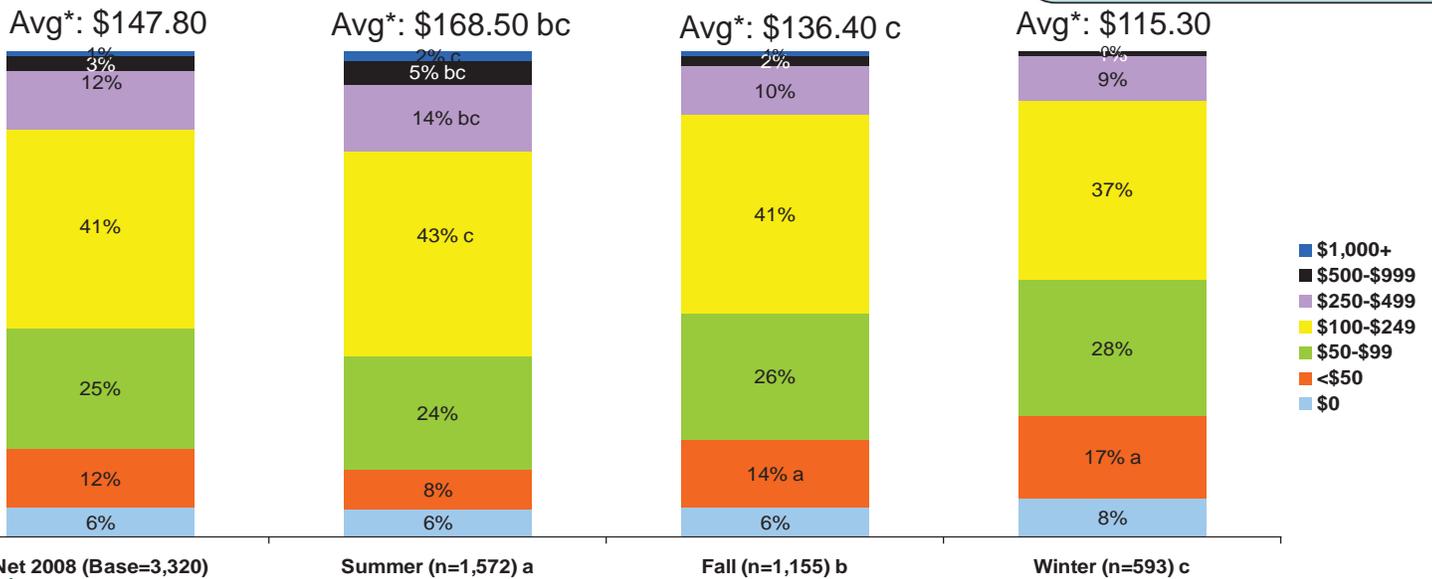
Regional Q33. Please tell us the total amount of money you and your immediate travel party spent on this trip in each of the categories listed below. Lodging Accommodations. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero and exclude outliers

# Overnight Trip Expenditures: Transportation

- In addition to the spending patterns mentioned in the callout below, visitors to the Kennebec, Highlands, Downeast/Acadia, and Mid-Coast regions all spent more on transportation than visitors to Portland and Southern Maine regions.

**•Canadian visitors** spent significantly more than US visitors on transportation (\$182)  
**•First time visitors** spent significantly more than repeat visitors on transportation (\$211)  
**•Leisure visitors** spent significantly more than business visitors on transportation (\$154)

## Self-Reported Spending: Transportation



Regional Q33. Please tell us the total amount of money you and your immediate travel party spent on this trip in each of the categories listed below. Transportation. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero and exclude outliers

# Overnight Trip Expenditures: Food

- Summer visitors and visitors to the Downeast/Acadia, Mid-Coast, and Southern Maine regions spent significantly more on food than visitors during other seasons or to most other regions.
- Canadian visitors and leisure visitors spent more on food than their counterparts.

## Self-Reported Spending: Food



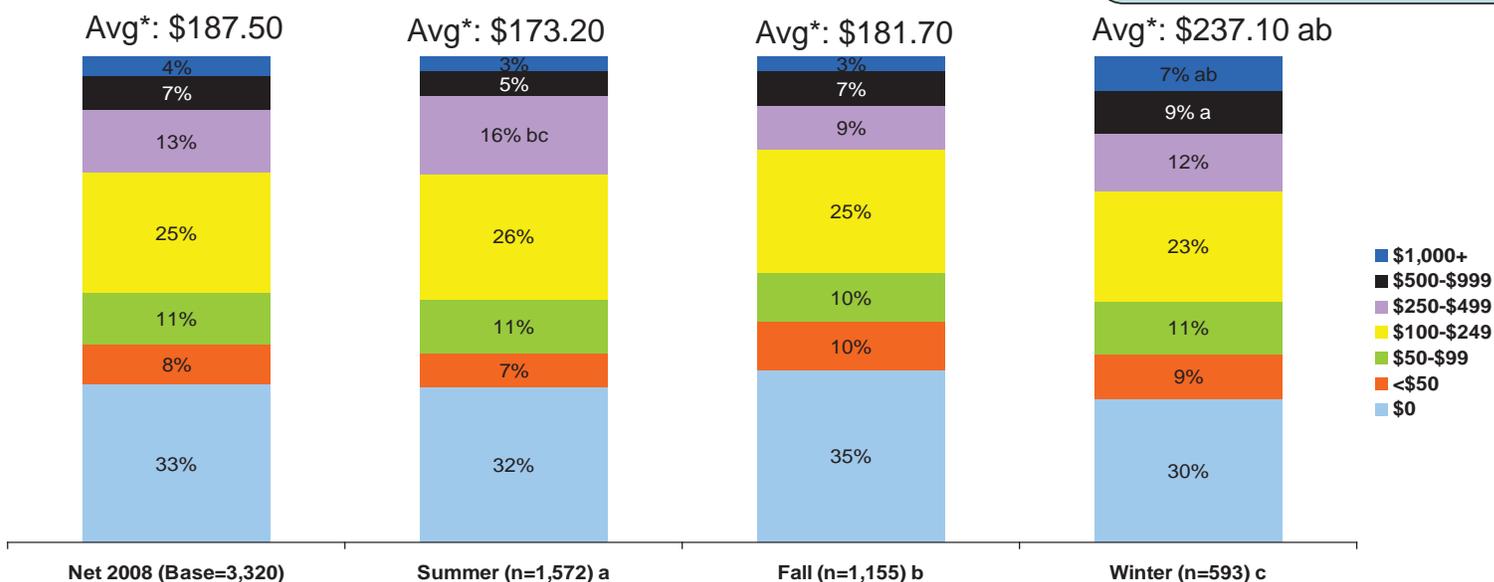
Regional Q33. Please tell us the total amount of money you and your immediate travel party spent on this trip in each of the categories listed below. Food. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero and exclude outliers

# Overnight Trip Expenditures: Retail Goods

- In contrast to other expenditures, spending on retail goods for winter overnight visitors to Maine is significantly higher than summer or fall overnight visitors to Maine. This underscores the importance of holiday shopping among visitors to the state.

•Canadian overnight visitors particularly stand out with their spending. Canadian overnight visitors spent an average of \$372 on retail goods during their trip compared to only \$155 among US visitors.

## Self-Reported Spending: Retail Goods



Regional Q33. Please tell us the total amount of money you and your immediate travel party spent on this trip in each of the categories listed below. Retail Goods. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero and exclude outliers

# Overnight Trip Expenditures: Recreation

- Unlike other expenditures, recreation spending was statistically stable across the different seasons.
- Notably, first-time visitors to Maine spent significantly more on recreation admissions and fees than returning visitors to the state.

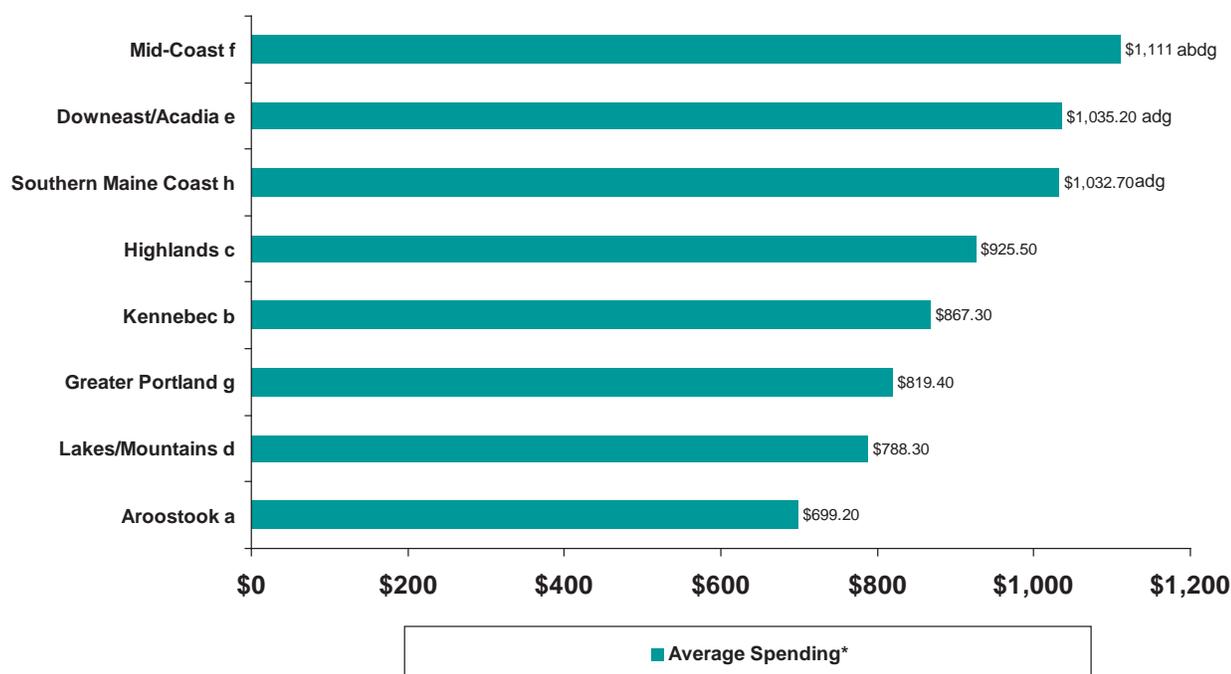
## Self-Reported Spending: Recreation (admissions/fees)



# Overnight Trip Expenditures by Region

- Overall spending among overnight visitors was highest among visitors to the Mid-Coast, Downeast/Acadia, and Southern Maine regions.
- In contrast, overnight visitors to Aroostook, the Lakes/Mountains, and Greater Portland spent significantly less than the three regions mentioned in the previous bullet.

## Self-Reported Spending: Total Amount Spent for All Categories



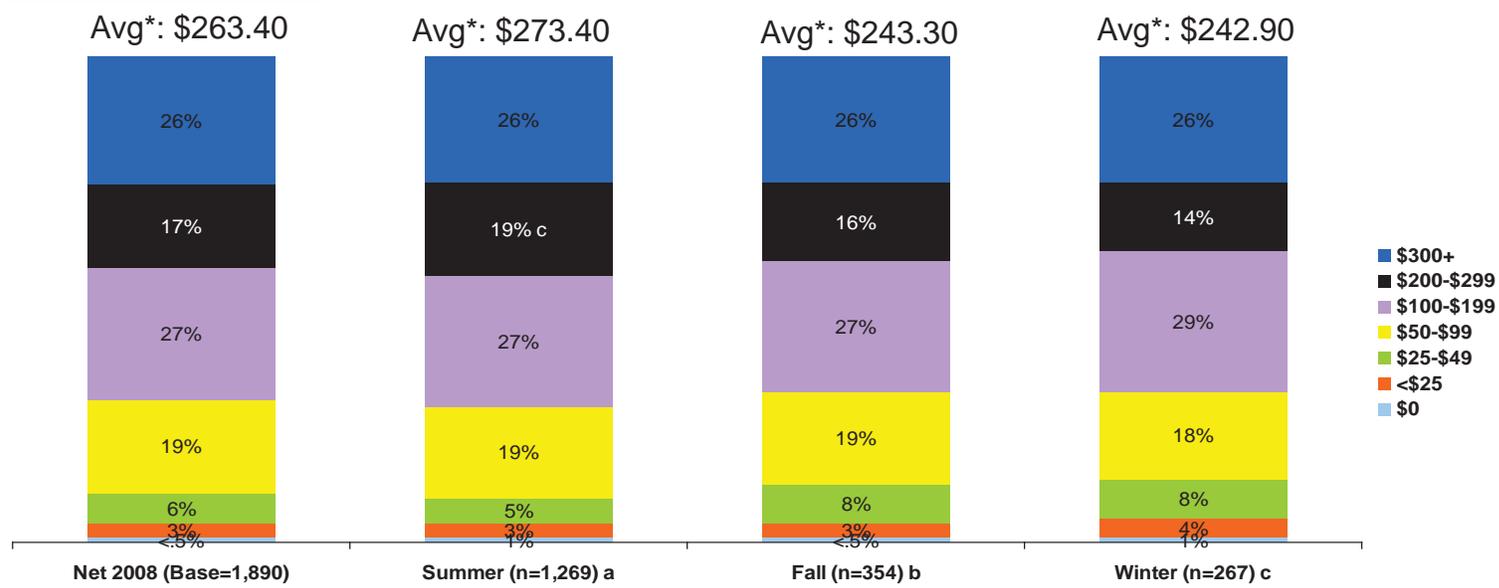
# Day Trip Expenditures: Net

- Business and leisure day visitors spend more on their trip to Maine than do VFR visitors. Likewise, Canadian day visitors spend more than US day visitors on their day trip to Maine.

**Day visitors to the Maine Highlands** spend more money on average (\$383) than day visitors to nearly any other region of Maine

Average spending by group:  
**Business:** \$297  
**Leisure:** \$282    **Canadian:** \$484  
**VFR:** \$200        **US:** \$224

## Self-Reported Spending: Total Amount for all Categories



Day Q14. 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. Net. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero

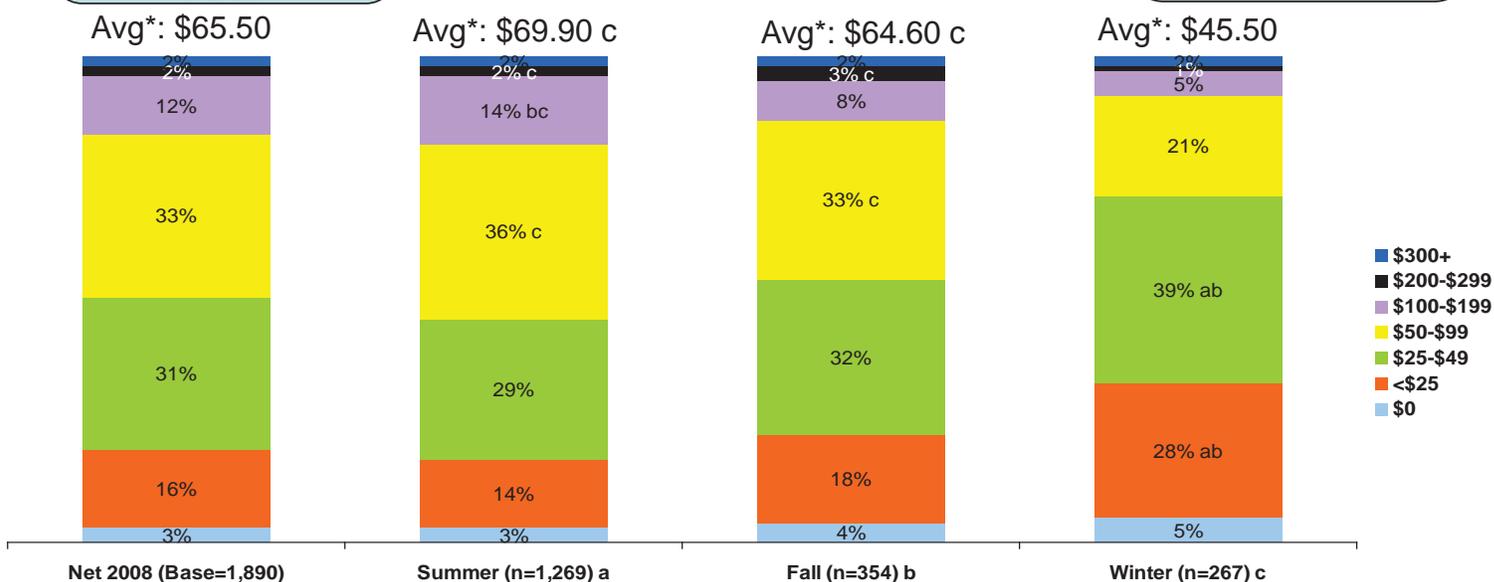
# Day Trip Expenditures: Transportation

- Day visitor transportation costs were significantly higher for summer and fall visitors than for winter visitors. This could partially be a function of high gas prices throughout the summer and fall.

**Day visitors to Southern Maine** spend less money on average (\$50) for transportation than day visitors to most other regions to Maine

**Business day visitors** spend more than Leisure or VFR day visitors on transportation (\$127). **First-time visitors** spend more than repeat visitors on transportation (\$138)

## Self-Reported Spending: Transportation



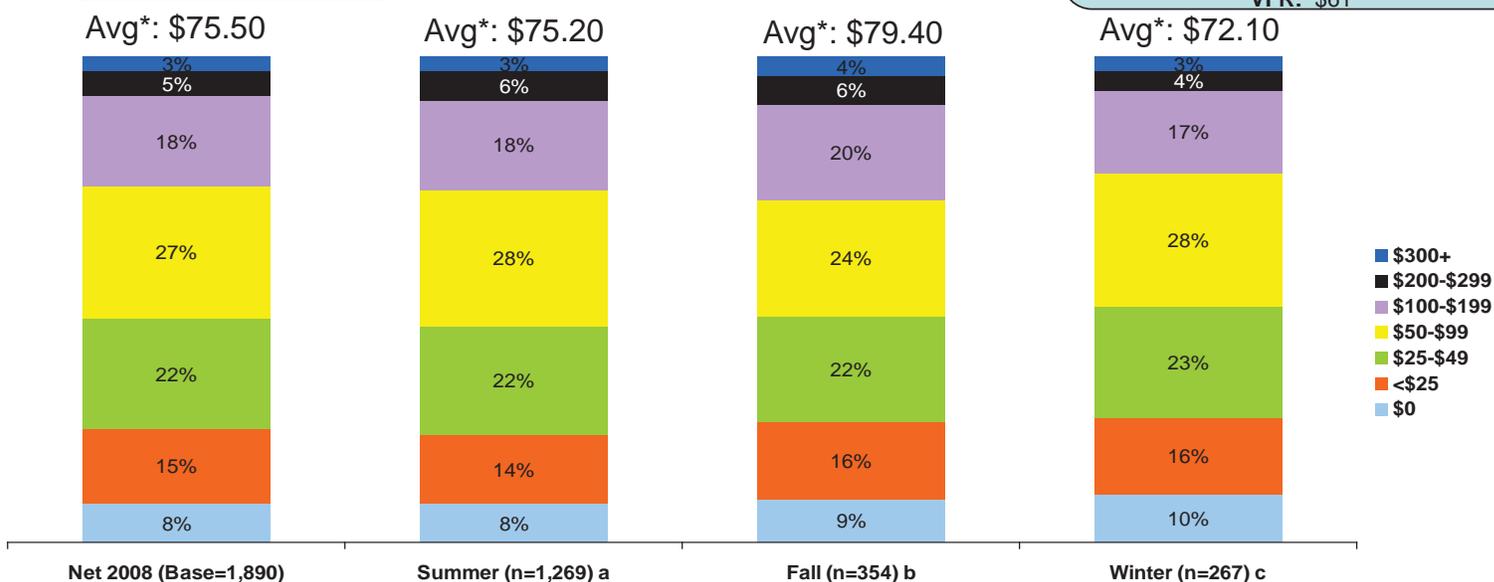
# Day Trip Expenditures: Food

- Food spending among day visitors is statistically consistent throughout the seasons.
- VFR day visitors spend significantly less than business or leisure day visitors.

**Day visitors to the Downeast/Acadia region** are more likely than other day visitors to spend \$300+ on food (8%)

**Business and Leisure day visitors** spend significantly more than VFR visitors on food  
**Business: \$94**  
**Leisure: \$79**  
**VFR: \$61**

## Self-Reported Spending: Food



# Day Trip Expenditures: Retail Goods

- Given that more than half of day visitors to the Maine Highlands cite shopping as the primary reason for their trip, it fits that this region also had statistically higher retail spending per visitor than most other regions.

Day visitors to the Maine Highlands spend more money on average for retail goods (\$172) than day visitors to most other regions

## Self-Reported Spending: Retail Goods

While business day visitors spend the most on transportation, they spend significantly less than leisure day visitors on retail goods  
**Business: \$56**  
**Leisure: \$122**  
**VFR: \$65**

Avg\*: \$103.20



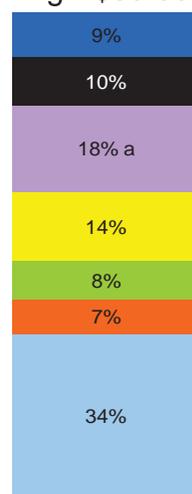
Net 2008 (Base=1,890)

Avg\*: \$104.00



Summer (n=1,269) a

Avg\*: \$89.90



Fall (n=354) b

Avg\*: \$116.90



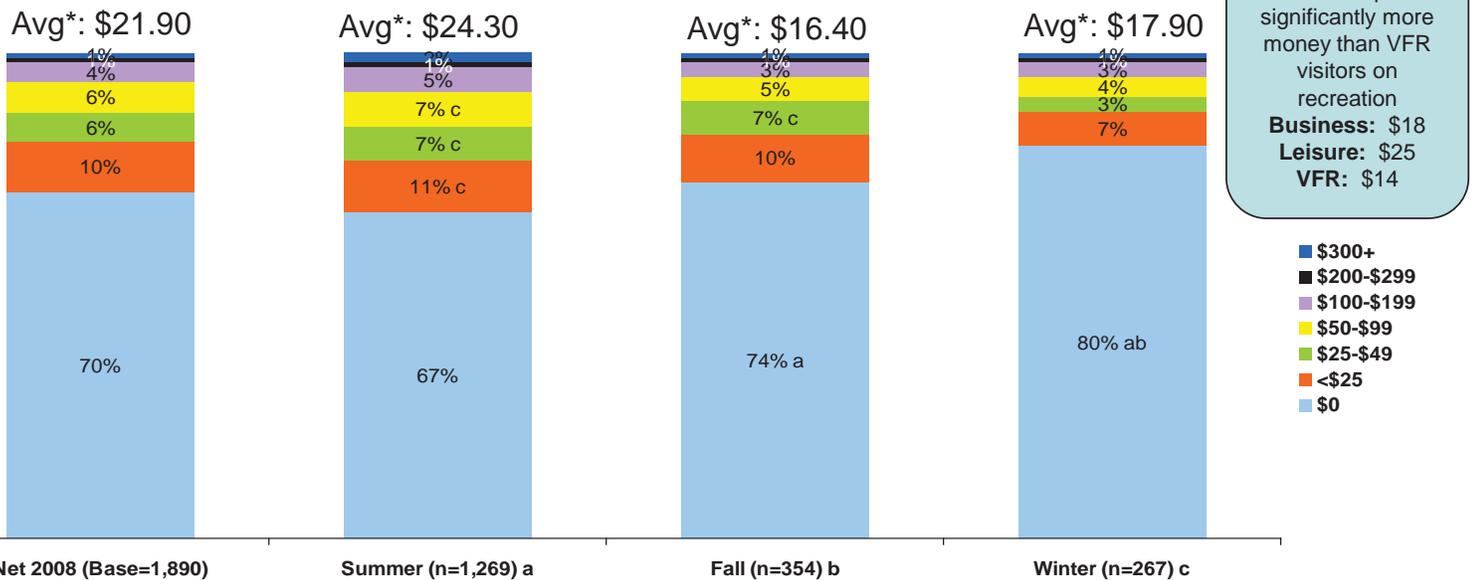
Winter (n=267) c

■ \$300+  
 ■ \$200-\$299  
 ■ \$100-\$199  
 ■ \$50-\$99  
 ■ \$25-\$49  
 ■ <\$25  
 ■ \$0

# Day Trip Expenditures: Recreation

- Day trip visitor spending on recreation admission and fees was statistically stable across the seasons in 2008.
- At the same time, leisure day visitors spent significantly more money – on average – on recreation compared to their VFR counterparts.

## Self-Reported Spending: Recreation

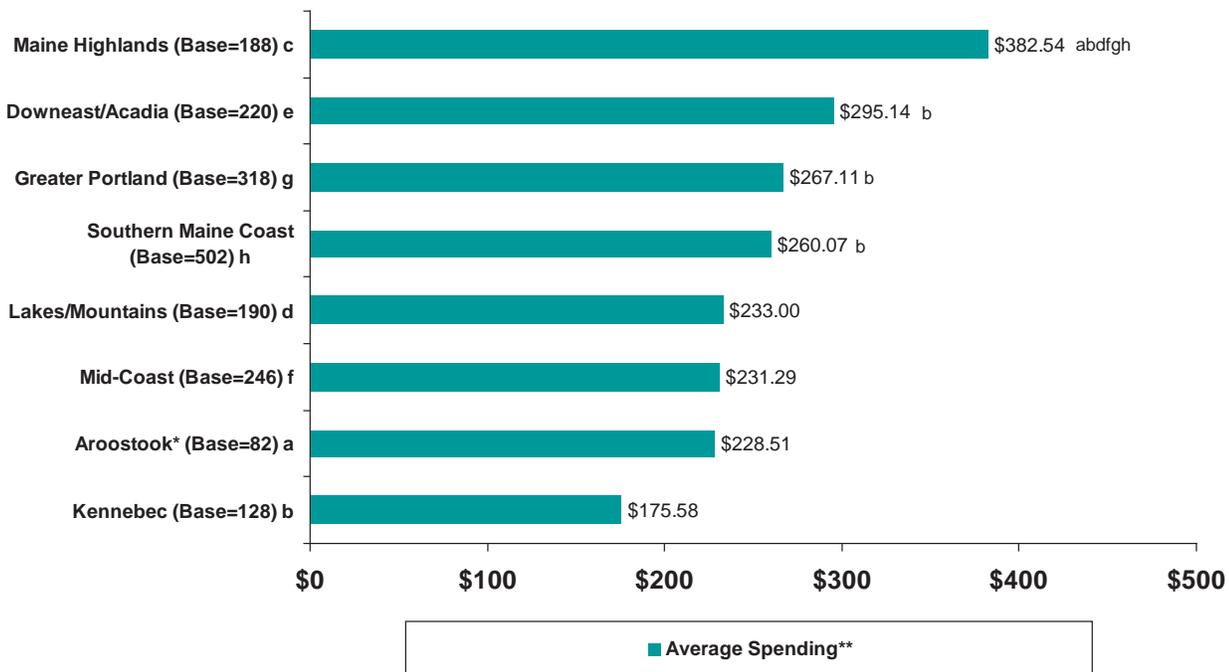


Day Q14. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below. Recreation. a,b,c, notes significant difference at 95% confidence level  
 \*Averages include zero

# Day Trip Expenditures by Region

- The average spending per day visitor to the Maine Highlands region was significantly higher than nearly every other region in Maine. This was primarily driven by the relatively high retail spending per Maine Highlands visitor when compared to visitors to other regions of the state.

## Self-Reported Spending: Total Amount for All Categories



Day Q14. Please tell us the total amount of money you and your immediate travel party spent on this trip in each of the categories listed below. Amount spent for all categories. \*Small sample size for these regions, data for this area should be used for directional purposes only. \*\*Averages include zero and exclude outliers

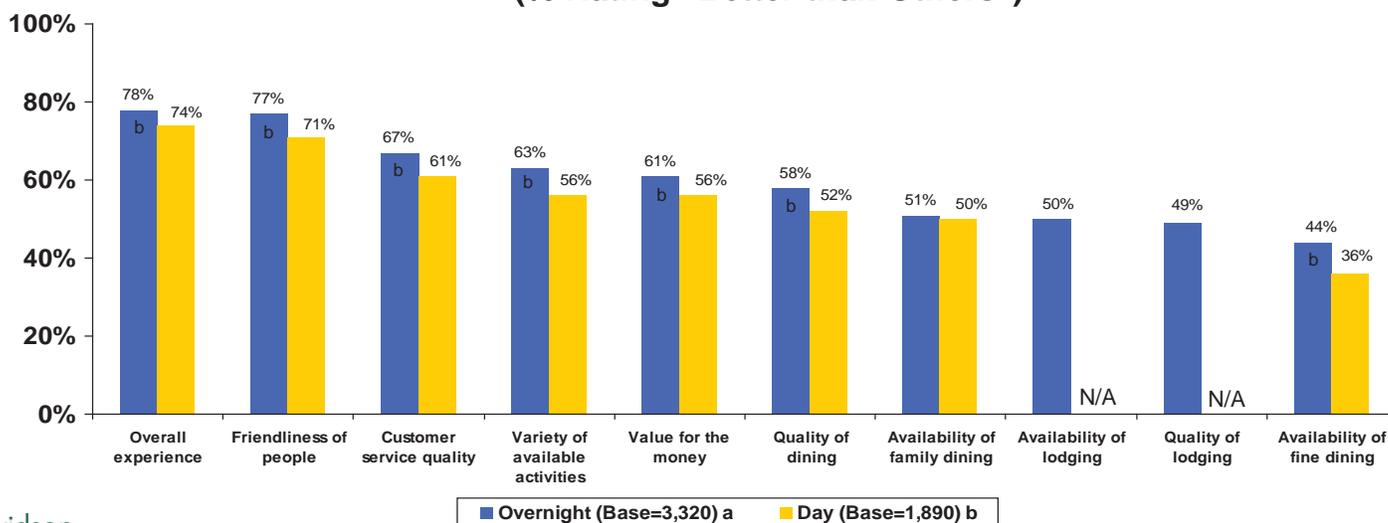
# Maine Trip Evaluation Measures



# Evaluation of Maine Trip as Compared to Other Destinations

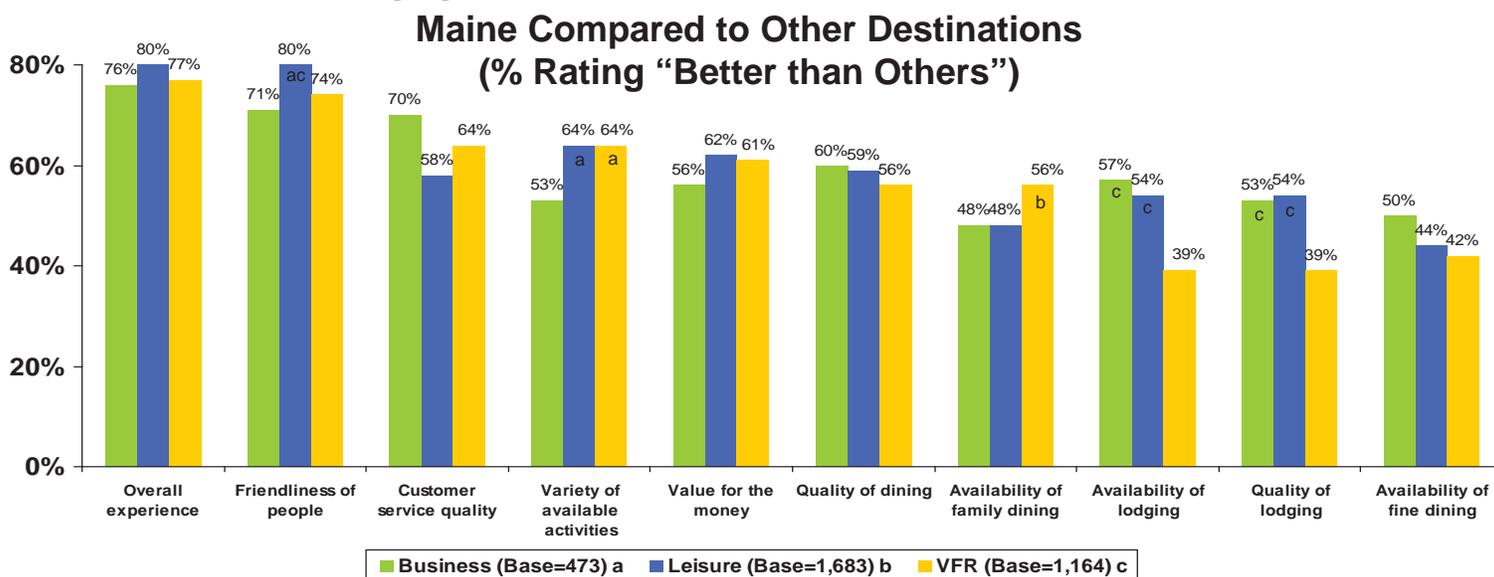
- Overnight visitors to Maine are significantly more likely than day visitors to rate Maine as “better than other destinations” for a variety of attributes including overall experience, friendliness, customer service, variety of activities, value, and dining.
- The quality and availability of lodging and dining options receive fewer top-two box mentions than other attributes, exposing a relative weakness for the state.

**Maine Compared with Other Destinations  
(% Rating "Better than Others")**



# Evaluation of Maine Trip Compared to Other Destinations: Overnight Visitors

- Most respondents of each trip type rate the overall experience in Maine as better than other destinations.
- Leisure overnight visitors are significantly more likely than VFR or business visitors to report that Maine people are friendlier than they are at other destinations.
- Likely due in part to the fact that many VFR overnight visitors do not use paid accommodations, this segment is less likely than leisure or business visitors to rate Maine’s lodging as better than other destinations.



# Evaluation of Overnight Maine Trip as Compared to Other Destinations

- The Mid-Coast, Portland, and Southern Maine regions receive generally higher scores than the Aroostook and Kennebec regions with the quality of dining and the availability of fine dining. **Top-Two Box Summary**

	Aroostook (n=97*) a	Kennebec (n=221) b	Highlands (n=361) c	Lakes/ Mountains (n=360) d	Downeast/ Acadia (n=455) e	Mid- Coast (n=427) f	Greater Portland (n=487) g	S. Maine Coast (n=875) h
Overall	72%	74%	74%	78%	83%	81%	78%	77%
Friendliness	67%	75%	68%	77%	80% c	83% ac	77%	76%
Service quality	63%	61%	64%	65%	72%	67%	67%	68%
Variety of activities	35%	65% a	51%	67% ac	70% ach	66% ac	65% ac	61% a
Value for the money	50%	53%	61%	63%	64%	65% g	55%	62%
Quality of dining	44%	40%	52%	54% b	58% b	64% abc	64% abcd	61% ab
Availability of family dining	35%	48%	48%	53% a	51%	55% a	49%	53% a
Availability of lodging	51%	40%	45%	50%	56% bg	52%	45%	52%
Quality of lodging	37%	38%	49%	47%	52% b	51% b	48%	52% b
Availability of fine dining	26%	28%	44% ab	40% b	49% ab	47% ab	49% ab	47% ab

# Evaluation of Overnight Maine Trip as Compared to Other Destinations

- Aroostook, Kennebec – and to a lesser extent, the Highlands – are more likely to be rated poorly than other regions on a wide variety of attributes.

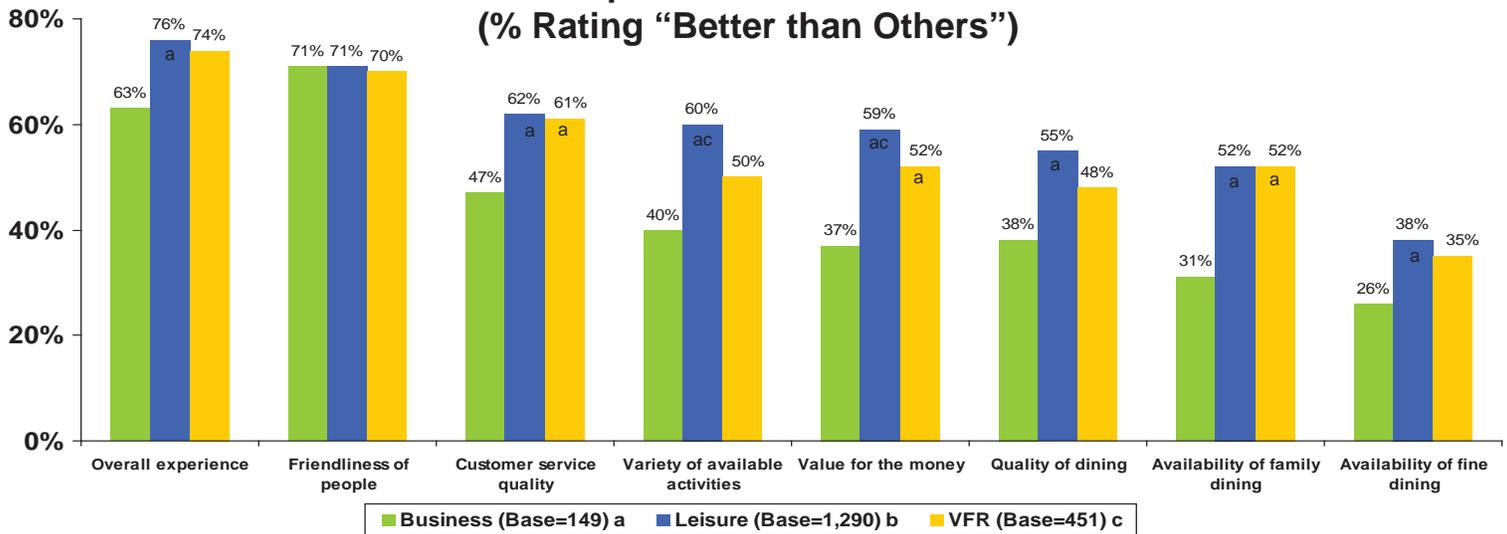
## Bottom-Two Box Summary (“Maine was one of the worst” or “Maine was not as good as most”)

	Aroostook (n=97*) a	Kennebec (n=221) b	Highlands (n=361) c	Lakes/ Mountains (n=360) d	Downeast/ Acadia (n=455) e	Mid- Coast (n=427) f	Greater Portland (n=487) g	S. Maine Coast (n=875) h
Availability of fine dining	23% efg	21% efgh	11%	13%	8%	8%	8%	11%
Availability of lodging	17% defgh	11% defh	10% defh	4%	4%	4%	6%	4%
Variety of activities	16% defgh	10% efg	11% defgh	5%	2%	2%	3%	5%
Value for the money	16% cdefgh	10% cdefg	4%	3%	3%	3%	3%	6% defg
Quality of dining	13% cdefgh	14% cdefgh	4%	4%	2%	3%	4%	4%
Quality of lodging	15% cdefgh	9% e	5%	4%	1%	3%	4%	3%
Friendliness of people	9% efg	7% e	5% e	4% e	1%	2%	3%	2%
Availability of family dining	14% cdefgh	5%	3%	4%	2%	1%	3%	2%
Service quality	12% defgh	9% defgh	6% efg	3%	1%	2%	2%	1%
Overall experience	13% cdefgh	9% cdefgh	2%	2%	1%	2%	2%	2%

# Evaluation of Maine Trip Compared to Other Destinations: Day Visitors

- Leisure and VFR day visitors rate Maine comparably compared to other destinations.
- As with overnight visitors to the state, most day visitors from all trip types think that Maine is better than other destinations for the overall experience, and friendliness of the people.

**Maine Compared to Other Destinations**  
(% Rating "Better than Others")



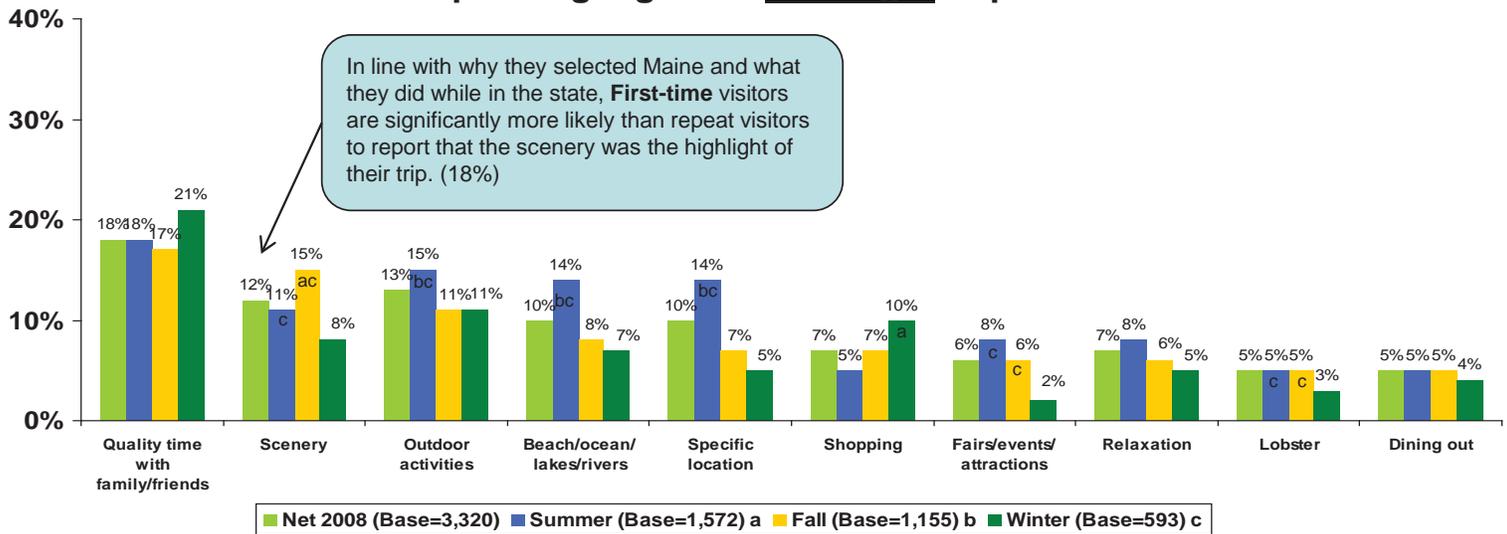
# Maine Trip Evaluation Measures: Highlight of Trip



# Highlight of Overnight Trip to Maine

- Across 2008, the top highlight of overnight visitors' trips to Maine was spending quality time with family and friends.
- Summer scored significantly higher than the other seasons for outdoor activities and water-based activities. Meanwhile, shopping was the highlight for significantly more overnight visitors in the winter rather than in other seasons.

Top 10 Highlights of Overnight Trips to Maine



## Highlight of Overnight Trip to Maine

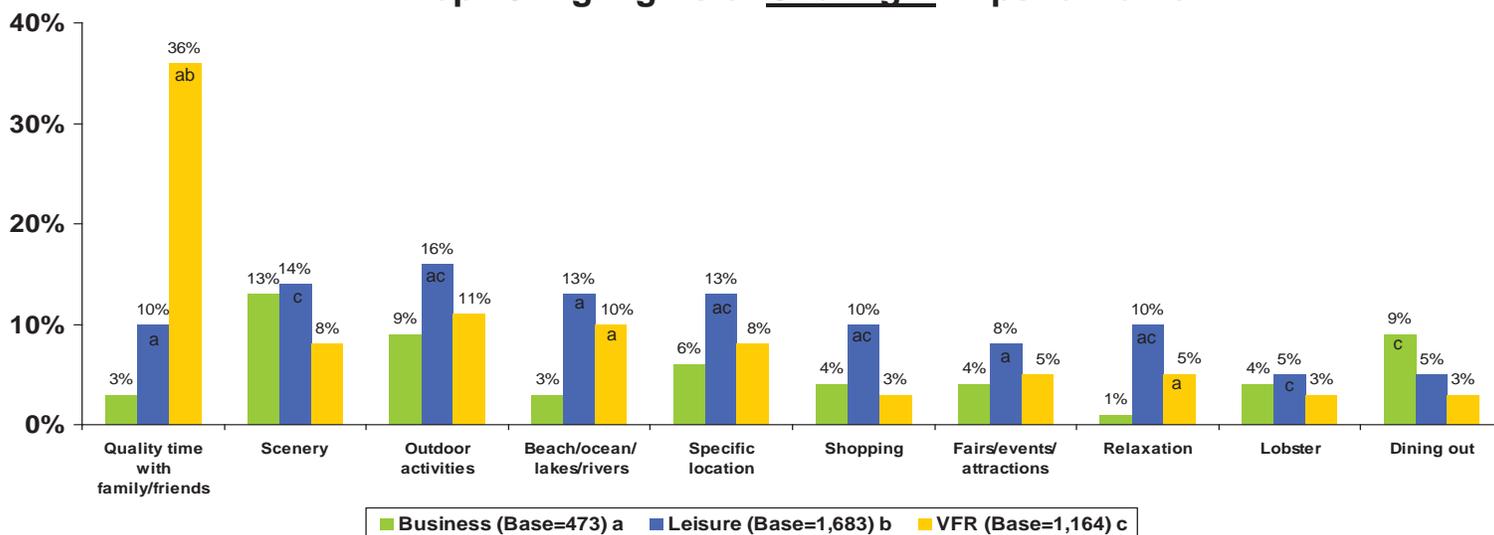
- Different regions of the state had their own highlights among overnight visitors to those respective areas.

	Aroostook (n=97*) a	Kennebec (n=221) b	Highlands (n=361) c	Lakes/ Mountains (n=360) d	Downeast/ Acadia (n=455) e	Mid- Coast (n=427) f	Greater Portland (n=487) g	S. Maine Coast (n=875) h
Time with family/friends	17%	19%	24%	22%	17%	19%	18%	16%
Scenery	17%	9%	12%	10%	16% h	15%	11%	10%
Outdoor activities	6%	22% agh	12%	22% acfgh	14%	13%	9%	10%
Beach/ocean/ lakes/rivers	2%	5%	3%	5%	6%	7%	7%	24% abcdefg
Specific location	5%	3%	7%	6%	25% abcd fgh	10% b	9%	8%
Shopping	6%	2%	10% bde	2%	3%	6% d	8% de	10% bde
Fairs/events	6%	5%	3%	6%	5%	8%	11% ceh	4%
Relaxation	1%	5%	4%	11% acg	6%	8% ag	4%	10% acg
Lobster	2%	1%	2%	1%	5% bcd	4%	8% abcdf	7% abcdf
Dining out	1%	2%	5%	1%	3%	8% abd	6%	6% d

# Highlight of Overnight Trip to Maine by Trip Type

- In line with overnight visitors' primary purpose of their trip to Maine, Leisure visitors were more likely than other types of visitors to point to outdoor activities, shopping, specific locations, and relaxation.
- Conversely, also in accordance with the primary purpose of their trip, VFR visitors really focus on the time they spent with family and friends as the highlight of their trip.

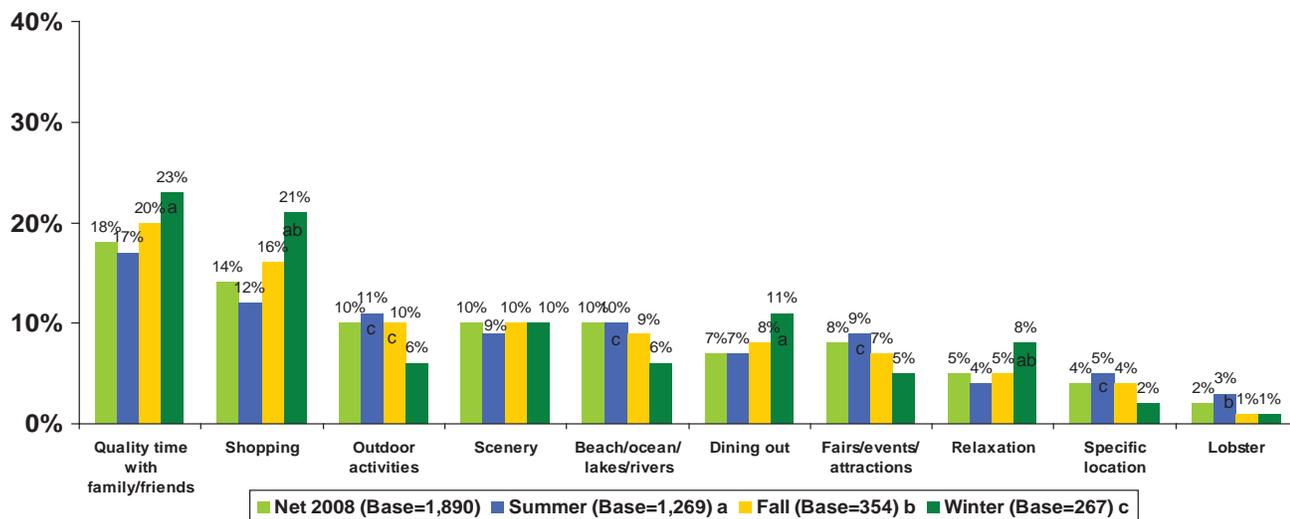
Top 10 Highlights of Overnight Trips to Maine



# Highlight of Day Trip to Maine

- Winter day visitors also were most likely to cite quality time with family/friends as the highlight of their trip to Maine. Shopping was also a highlight for 21% of winter day visitors.

## Top 10 Highlights of Day Trips to Maine



## Highlight of Day Trip to Maine

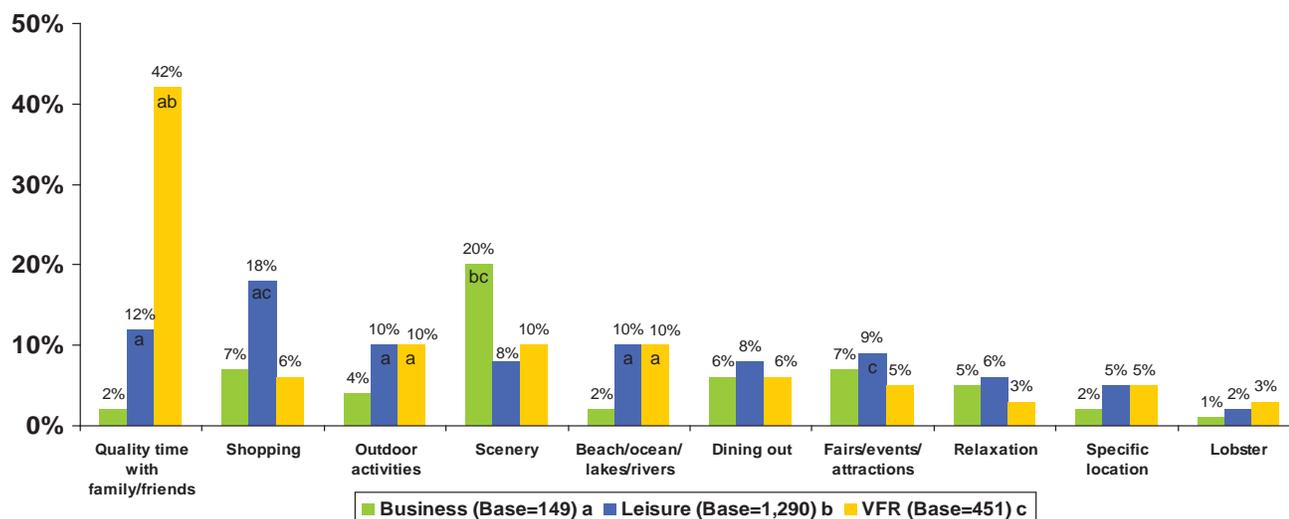
- Interestingly, the highlight of day visitors to Maine's different regions does not always mirror the highlight of overnight visitors to those regions.

	Aroostook (n=82*) a	Kennebec (n=128) b	Highlands (n=188) c	Lakes/ Mountains (n=190) d	Downeast/ Acadia (n=220) e	Mid- Coast (n=246) f	Greater Portland (n=318) g	S. Maine Coast (n=502) h
Time with family/friends	8%	29% acef	13%	26% ace	12%	16%	21% a	18%
Scenery	10%	12%	9%	13%	8%	15% g	6%	8%
Outdoor activities	6%	11%	12%	17% gh	13%	10%	7%	7%
Beach/ocean/ lakes/rivers	0%	1%	1%	5%	8% bc	8% bc	7% bc	22% bcdefg
Specific location	0%	1%	<.5%	3%	13% bcdfgh	5% bc	3%	5% bc
Shopping	44% bcdefgh	8%	18% df	3%	10%	9%	13% d	18% bdf
Fairs/events	3%	8% c	1%	6%	6%	14% acdh	12% ach	6% c
Relaxation	3%	5%	2%	5%	8%	4%	4%	6%
Lobster	0%	2%	0%	0%	3%	5% g	1%	3%
Dining out	0%	9% d	4%	2%	4%	7%	13% cde	11% cde

# Highlight of Day Trip to Maine by Trip Type

- Among leisure day visitors, shopping was the most cited highlight of their trip to Maine. This differs from overnight leisure visitors, who were more likely to cite outdoor activities rather than shopping as the highlight of their trip.
- Consistent with other VFR slides, quality time with friends and family was the most widely reported highlight of their day trip to Maine.

## Top 10 Highlights of Day Trips to Maine



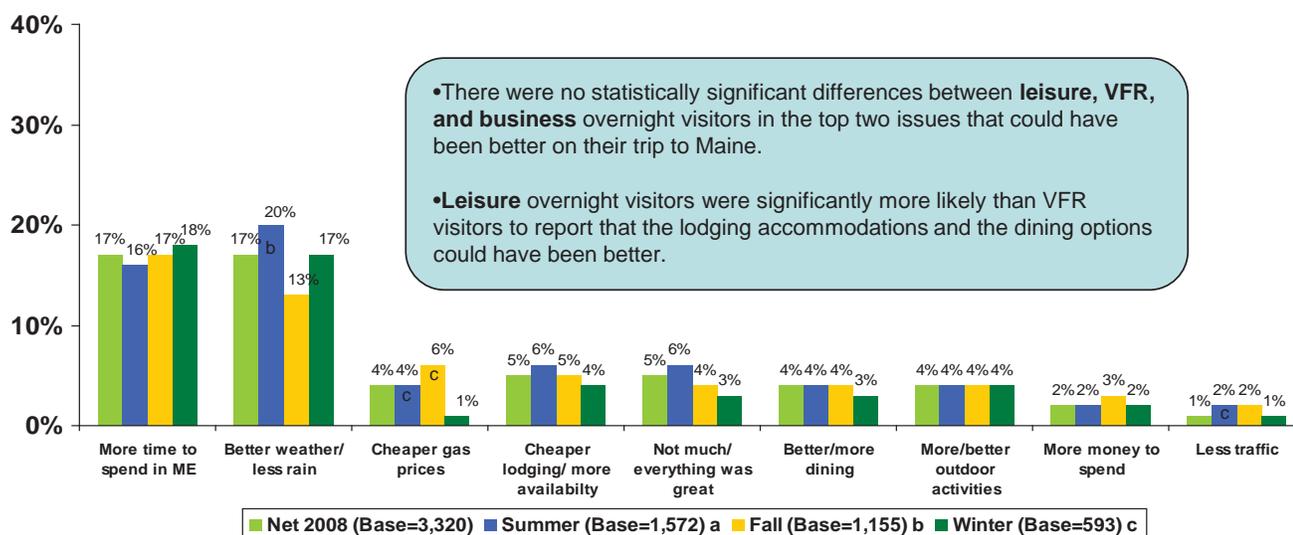
# Maine Trip Evaluation Measures: What Could Have Been Better



# Aspects of Overnight Trips that Could Have Been Better

- Across the seasons, the primary issues overnight visitors had with Maine were a lack of time and good weather.
- Summer and winter respondents were both more likely than fall respondents to report that the weather could have been better.
- Meanwhile, fall respondents were more likely than summer or winter respondents to wish for cheaper gas prices – potentially a function of the gas price spike in 2008.

What Could Have Been Better on Overnight Trips to Maine



# Aspects of Overnight Trips that Could Have Been Better

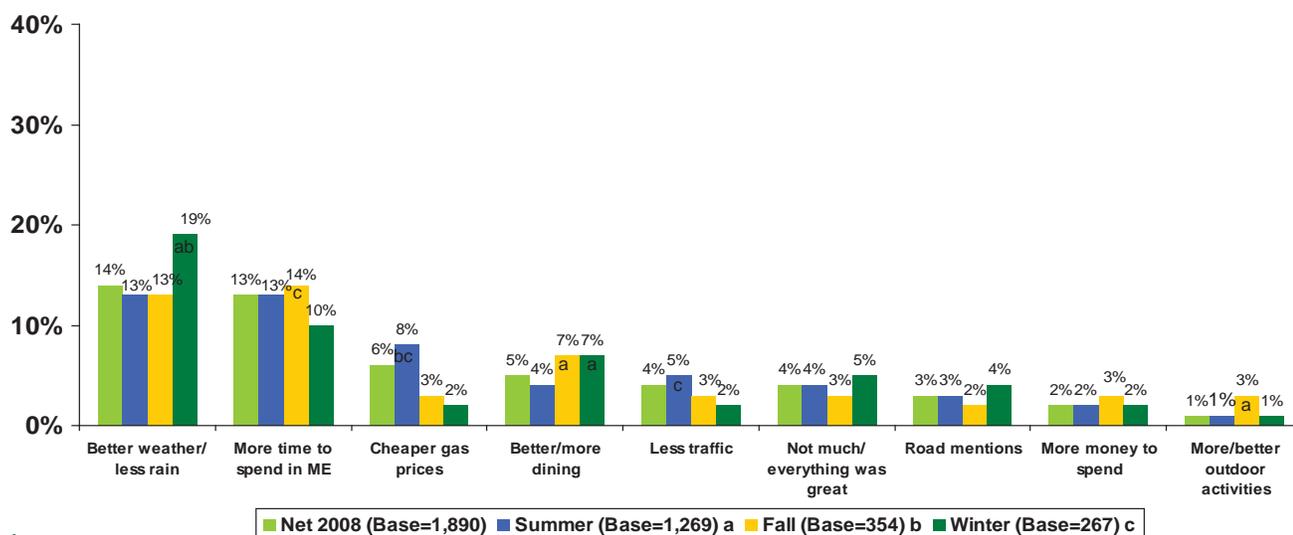
- Aspects of overnight trips that could have been better are relatively stable across the different regions. However, significantly more overnight visitors to the Kennebec region wish they had more money to spend while traffic was more of an issue in Aroostook.

	Aroostook (n=97*) a	Kennebec (n=221) b	Highlands (n=361) c	Lakes/ Mountains (n=360) d	Downeast/ Acadia (n=455) e	Mid- Coast (n=427) f	Greater Portland (n=487) g	S. Maine Coast (n=875) h
More time to spend	15%	14%	15%	15%	14%	21%	18%	18%
Better weather	8%	14%	14%	20% a	19% a	17%	14%	18% a
Cheaper gas prices	3%	3%	4%	6%	4%	5%	4%	3%
Cheaper lodging/More availability	10%	6%	8%	3%	4%	4%	8% d	4%
Not much	6%	5%	2%	6%	6%	5%	2%	5%
Better/More dining	5%	2%	4%	3%	2%	4%	3%	6% e
Better/More outdoor activities	6%	4%	3%	3%	3%	7% dgh	3%	3%
More money to spend	1%	9% acdefgh	2%	1%	2%	2%	2%	2%
Less traffic	9% bcdefgh	1%	1%	2%	1%	1%	<.5%	2% g

# Aspects of Day Trips that Could Have Been Better

- As with overnight visitors to the state, the largest percentage of day visitors point to the weather and a lack of time as their key issues with their visit.
- VFR day visitors were significantly more likely than business day visitors to point to gas prices as an issue with their day visit to Maine.
- Aside from that issue, responses were largely stable across trip types.

What Could Have Been Better on Day Trips to Maine



# Aspects of Day Trips that Could Have Been Better

- Consistent with the findings from overnight visitors, the aspects of day visitors' trips that could have been better were largely consistent across the regions.

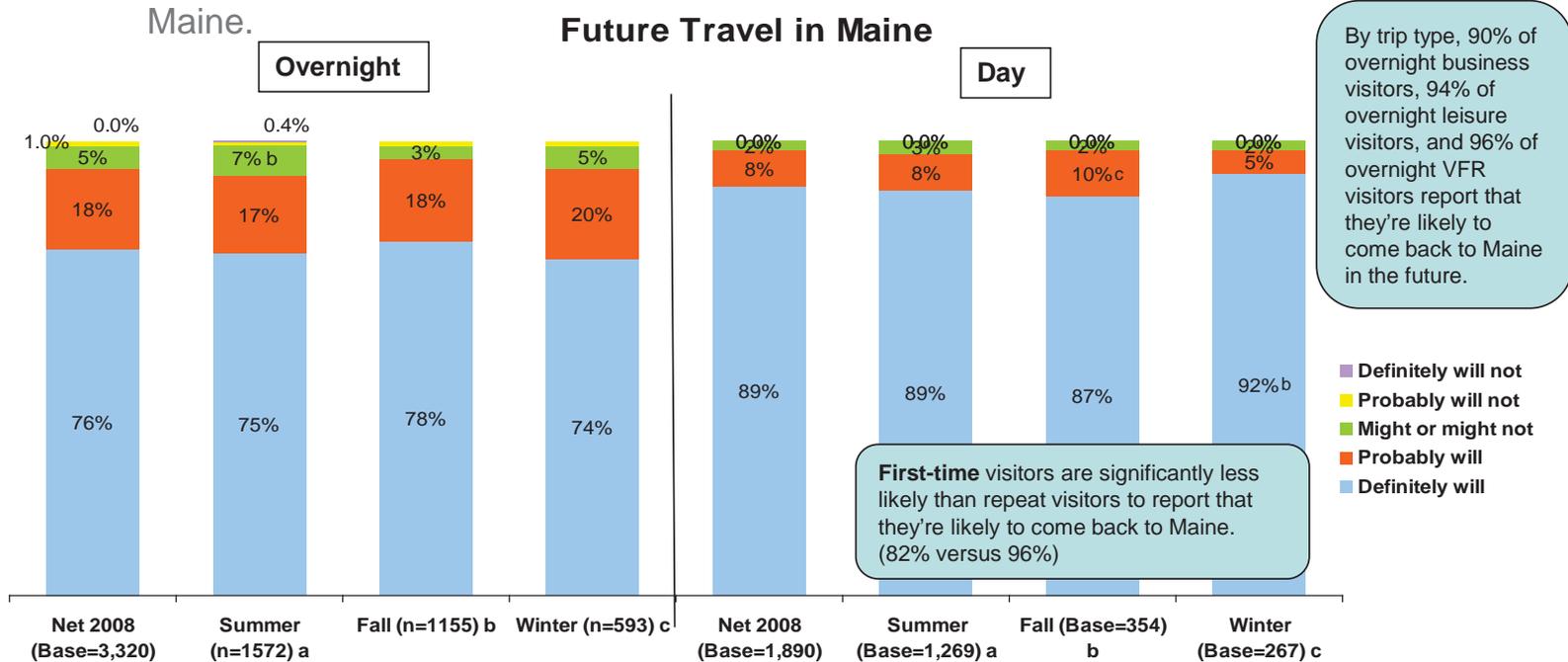
	Aroostook (n=82*) a	Kennebec (n=128) b	Highlands (n=188) c	Lakes/ Mountains (n=190) d	Downeast/ Acadia (n=220) e	Mid- Coast (n=246) f	Greater Portland (n=318) g	S. Maine Coast (n=502) h
Better weather	9%	14%	15%	19% e	9%	14%	14%	13%
More time to spend	19%	12%	7%	15%	17% c	16%	11%	10%
Cheaper gas prices	3%	7%	10% h	7%	7%	9% h	5%	4%
Better/More dining	4%	4%	7%	4%	5%	4%	4%	5%
Less traffic	0%	0%	3%	2%	2%	7% de	5% d	6% de
Not much	0%	6%	6%	2%	2%	6%	4%	4%
Road mentions	4%	6%	6% fgh	4%	7% fgh	<.5%	<.5%	1%
More money to spend	3%	1%	3%	1%	2%	1%	4%	2%
Better/More outdoor activities	0%	2%	1%	<.5%	1%	1%	1%	2%

# Maine Trip Evaluation Measures: Key Topline Metrics



# Future Travel in Maine

- Among overnight visitors, fall has the highest top-two box ratings for the likelihood to return to Maine. Day top-two box is statistically stable across the seasons.
- It's also important to note that the top-two box likelihood to return among overnight visitors is statistically stable across the primary regions visited in Maine.

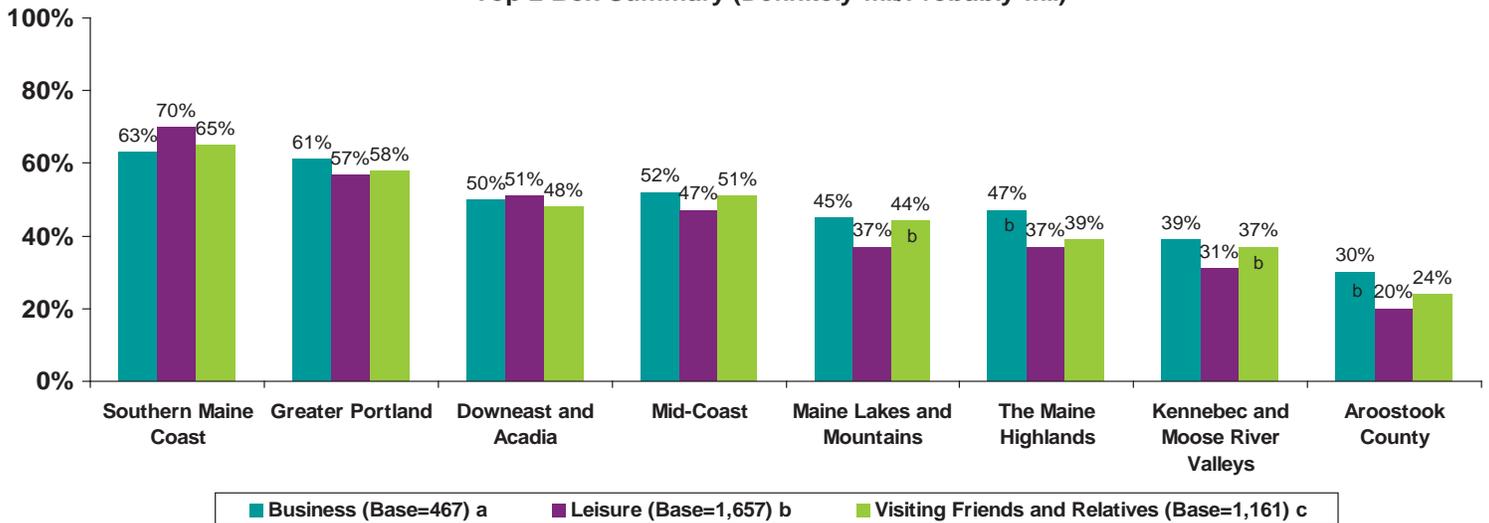


Regional Q37, Day Q19. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future? a,b,c notes significant difference at 95% confidence level.

# Future Travel to Each Region in Maine: Overnight Visitors

- Overall, a greater percentage of overnight visitors report that they are likely to visit more southern and coastal regions of Maine as opposed to more northern and inland regions in the future.
- The likelihood that overnight visitors to Maine will come again in the future to visit southern and coastal regions does not significantly vary by trip type.

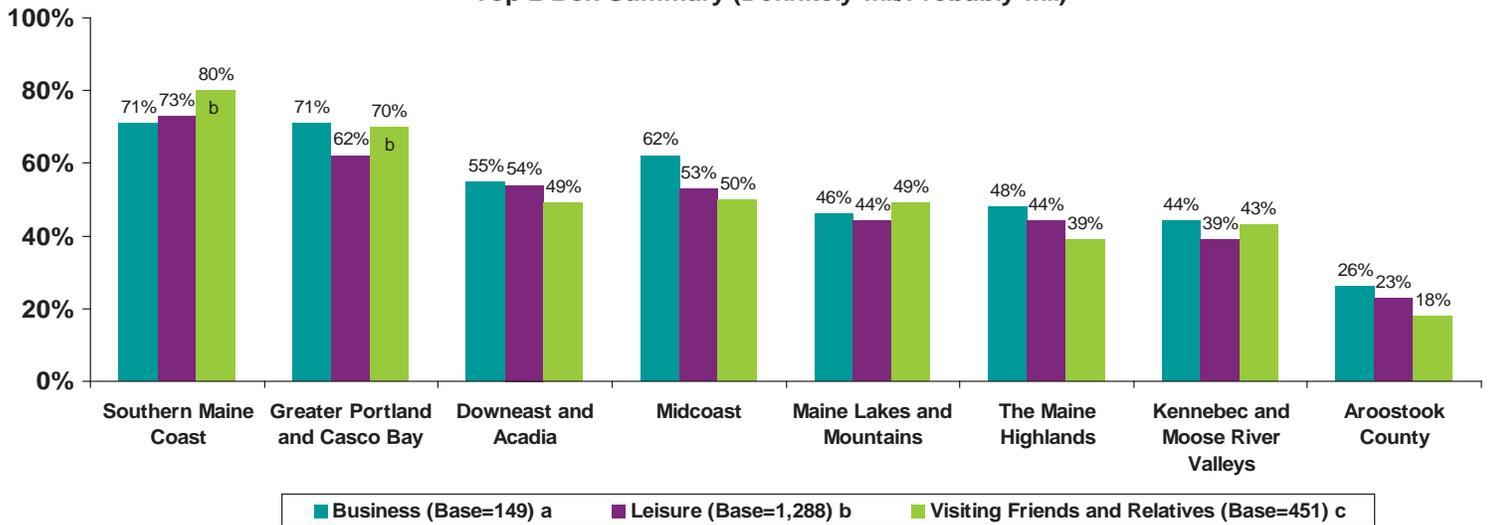
**Percent of All Overnight Visitors who are Likely to Travel to Each Region  
Top 2 Box Summary (Definitely will/Probably will)**



# Future Travel to Each Region in Maine: Day Visitors

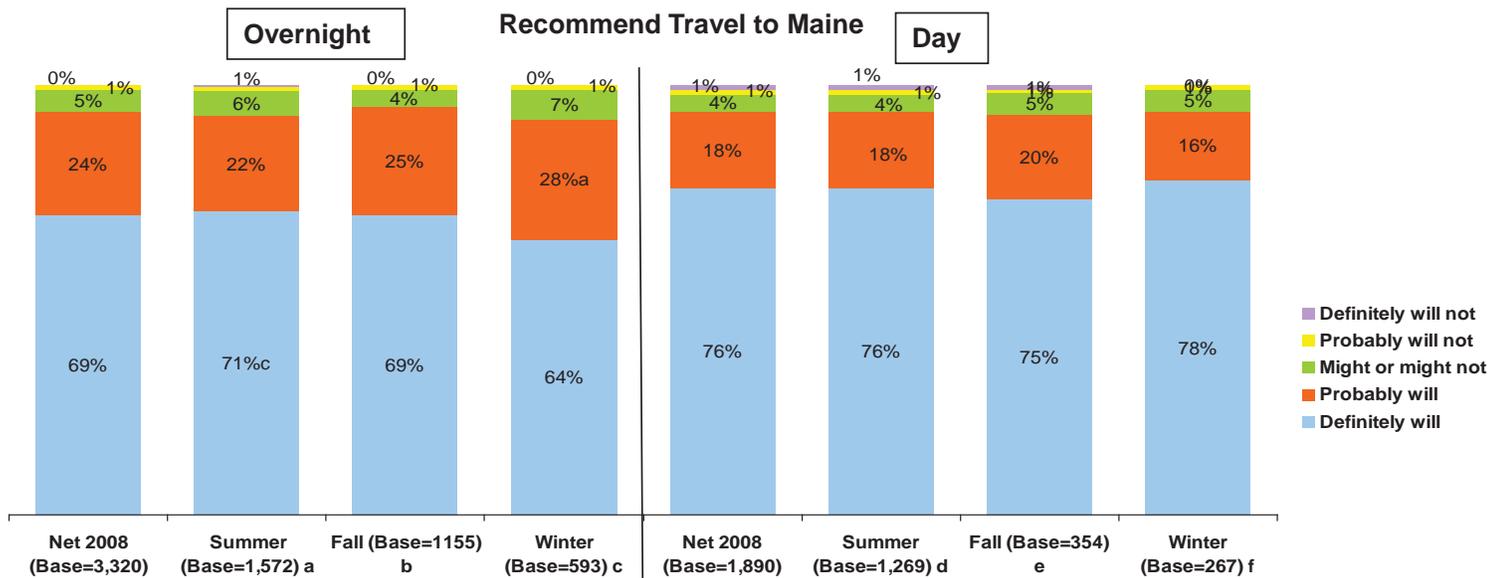
- The likelihood that VFR visitors will travel to the Southern Maine Coast and Greater Portland regions in the future is significantly higher than it is among leisure day visitors.
- Across all other regions, there are no significant differences in the likelihood to travel to the region in the future by trip type.

Percent of all Day Visitors who are Likely to Travel to Region  
Top 2 Box Summary (Definitely will/Probably will)



# Recommendation of Maine as a Travel Destination

- The likelihood that overnight and day visitors to Maine would recommend traveling to Maine does not significantly vary by the primary region visited by these travelers.
- The only significant seasonal difference is that summer overnight visitors are significantly more likely than winter visitors to say that they'll definitely recommend Maine.

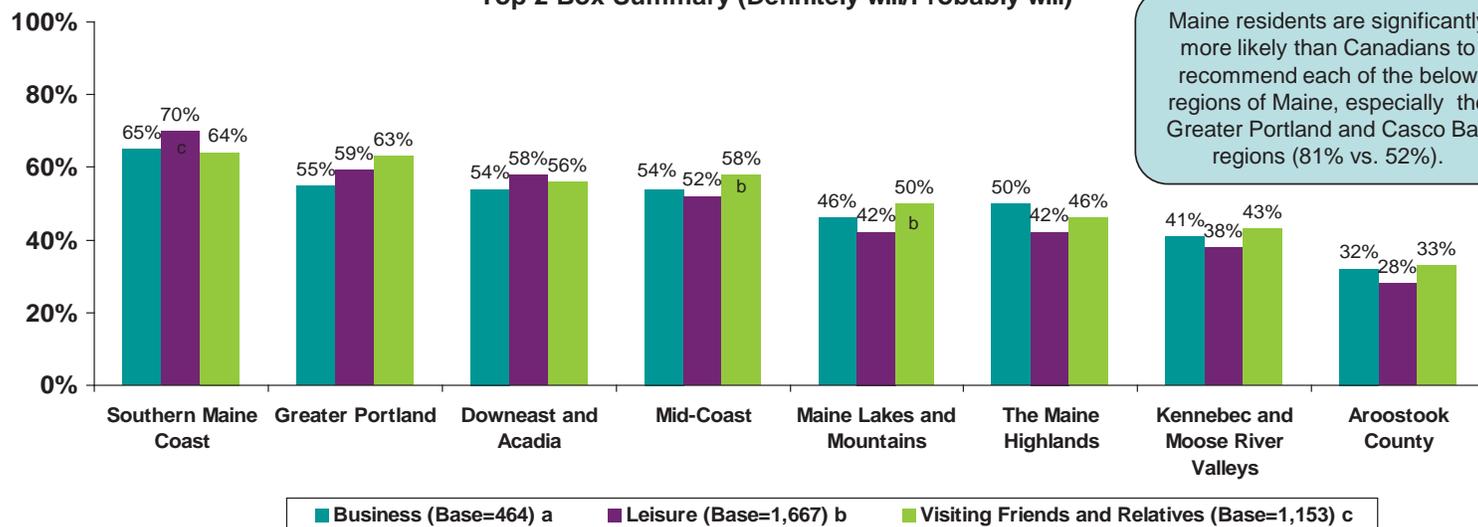


Regional Q38, Day Q19b. How likely will you be to recommend Maine as a vacation/travel destination to friends or relatives? a,b,c notes significant difference at the 95% confidence level

# Recommendation of Maine as a Travel Destination: Overnight Visitors

- Across all overnight visitors, regions that attract the most visitors have the highest recommendation rates among each trip type.
- Overnight leisure visitors are significantly more likely than VFR visitors to recommend the Southern Maine Coast as a place to travel.
- Meanwhile, VFR visitors are significantly more likely than leisure visitors to recommend the Mid-Coast and Lakes and Mountains regions of the state.

**Percent of All Overnight Visitors who are Likely to Recommend Each Region**  
**Top 2 Box Summary (Definitely will/Probably will)**



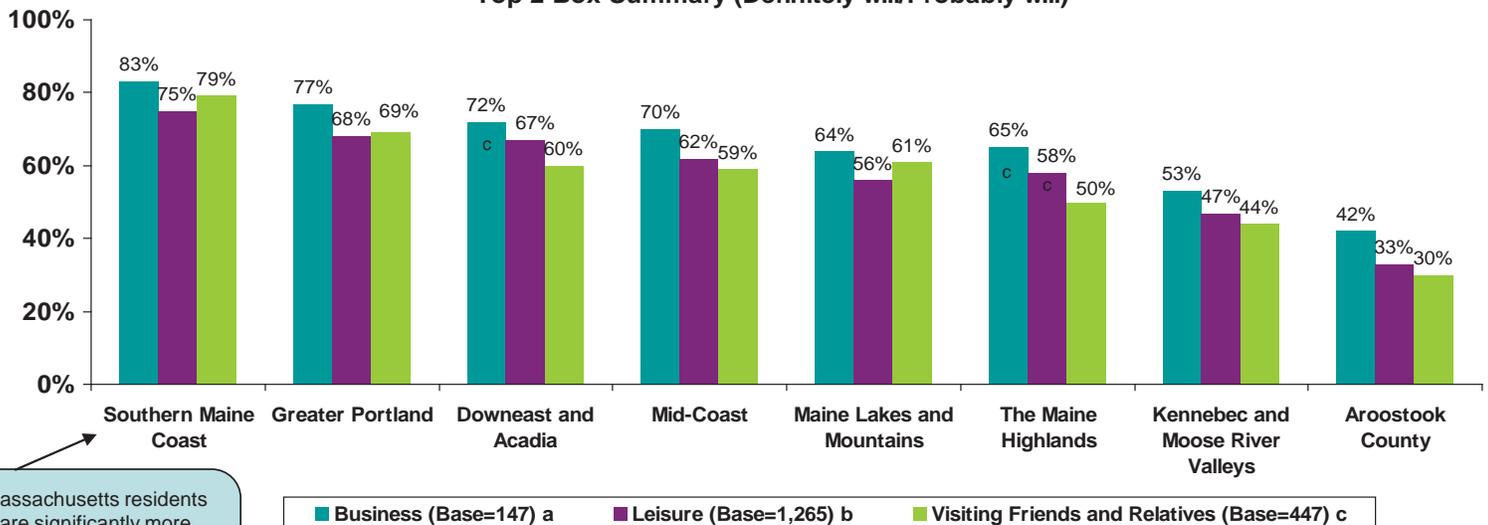
Maine residents are significantly more likely than Canadians to recommend each of the below regions of Maine, especially the Greater Portland and Casco Bay regions (81% vs. 52%).



# Recommendation of Maine as a Travel Destination: Day Visitors

- The overall ranking of each Maine region among day visitors mirrors the overall recommendation among overnight visitors reviewed on the previous slide.
- Interestingly, Massachusetts residents are significantly more likely than Maine residents to recommend the Southern Maine Coast as a place to visit.

Percent of All Day Visitors who are Likely to Recommend Each Region  
Top 2 Box Summary (Definitely will/Probably will)

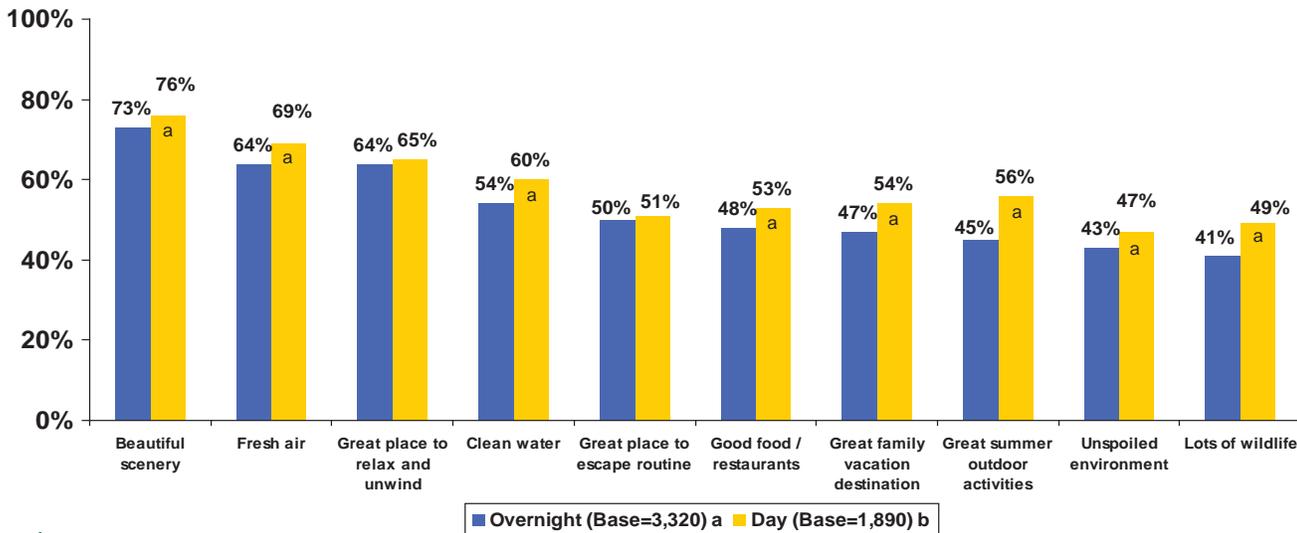


Massachusetts residents are significantly more likely than Mainers to recommend the Southern Maine Coast (82% vs. 75%).

# Descriptions of Maine – Most Frequently Selected

- The most widely cited phrases to describe Maine among both overnight and day visitors to the state include: beautiful scenery, fresh air, a great place to relax and unwind, clean water, and a great place to escape routine. At least half of both groups used those phrases to describe the state.

Phrases That Describe Maine  
2008

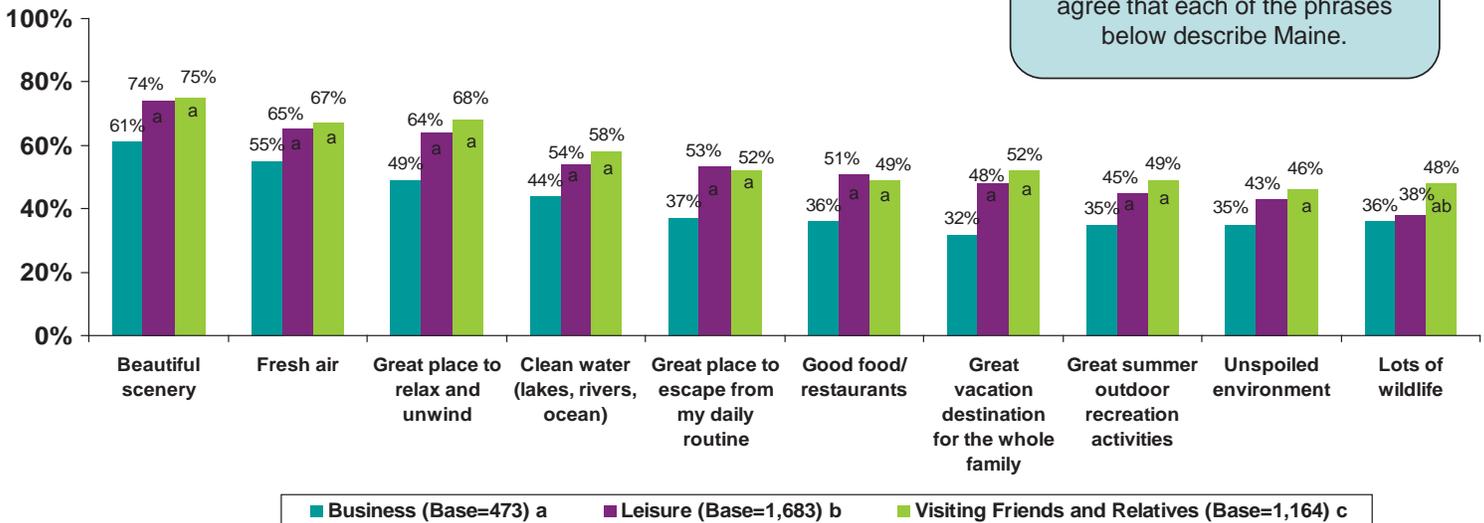


Regional Q39, Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination. (Please check as many or as few as apply) a,b,c notes significant difference at 95% confidence level.

# Descriptions of Maine Most Frequently Selected: Overnight Visitors

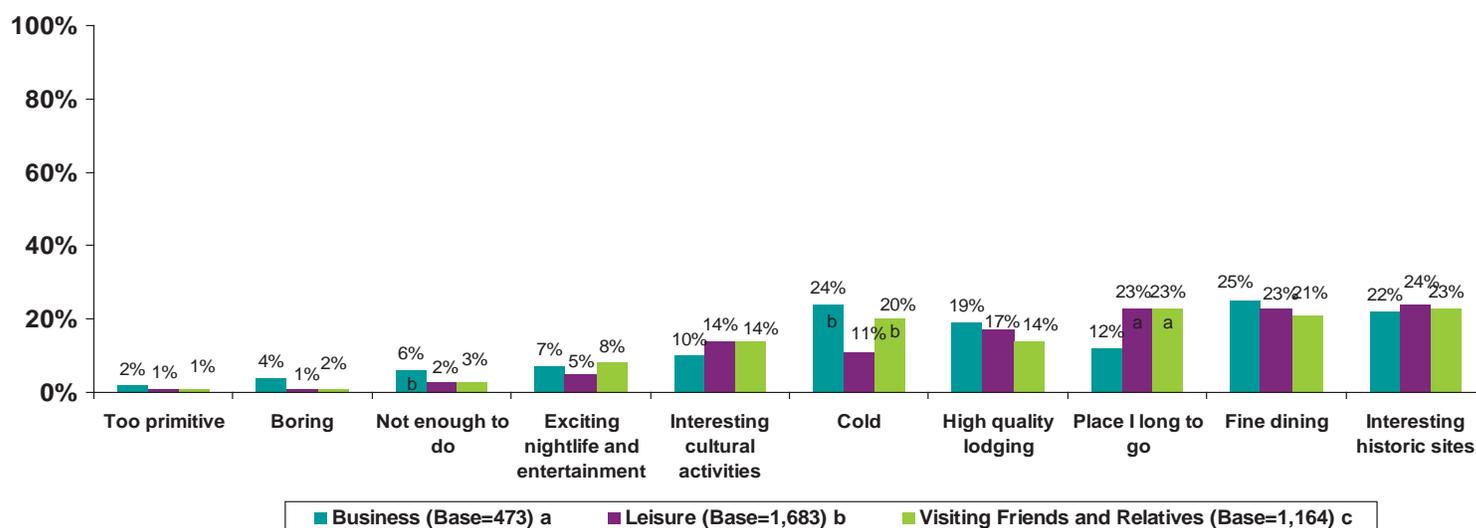
- Looking at descriptions of Maine by trip type, leisure and VFR overnight visitors to Maine were both significantly more likely than business visitors to describe Maine using the phrases below.
- The only significant difference between leisure and VFR visitors was that VFR visitors were more likely to say that Maine has a lot of wildlife.

Phrases That Describe Maine Overnight Visitors



# Descriptions of Maine Least Frequently Selected: Overnight Visitors

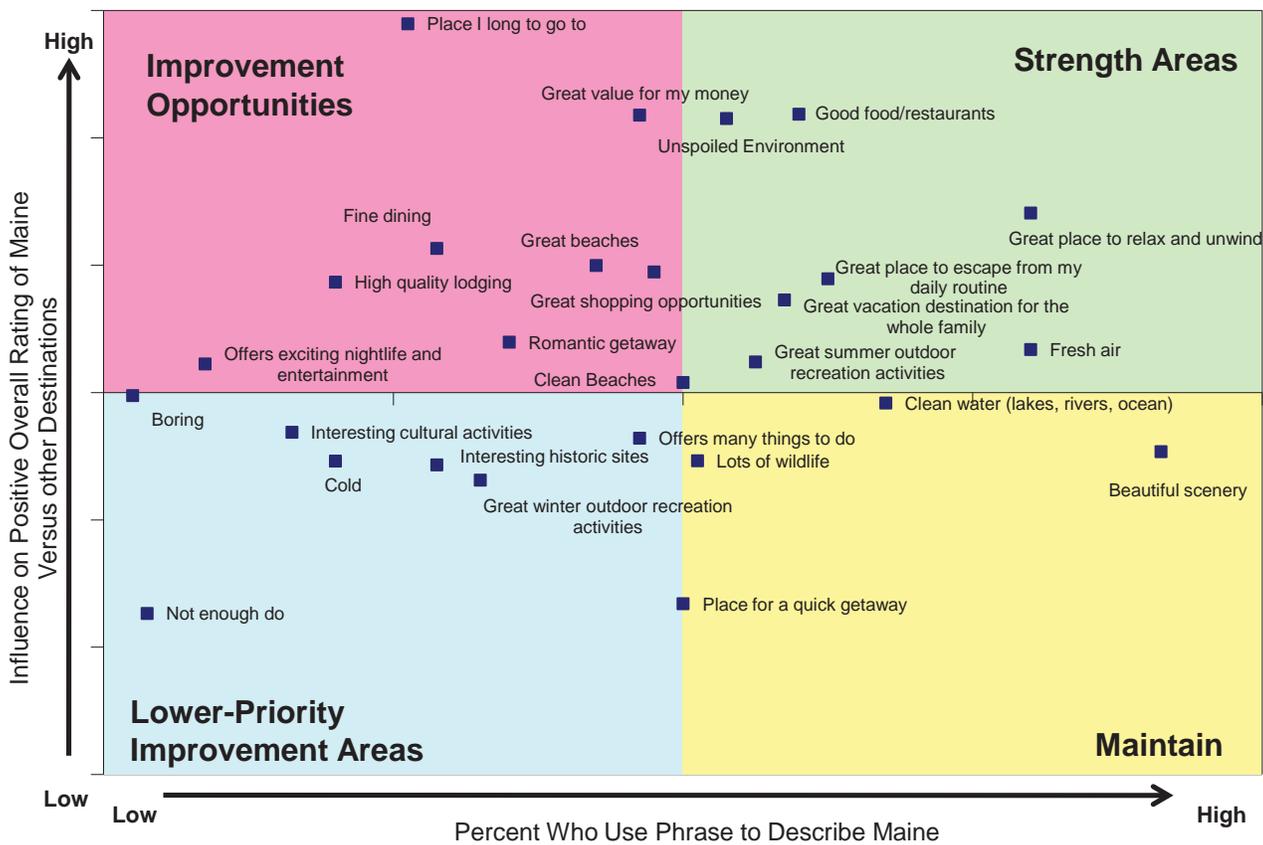
- Overnight visitors are not at all likely to call Maine primitive or boring. However, they're also not likely to report that Maine has exciting nightlife or entertainment.
- Also, one-quarter or fewer of overnight visitors from each trip type are likely to say that Maine has high quality lodging, fine dining, interesting cultural activities, or interesting historical sites.



# The Maine Quadrant Analysis

- In the following quadrant chart, we visually highlight the output of a regression model which shows the relationship between how overnight visitors described the state and their overall satisfaction with their experience visiting the state.
- The quadrant chart on the next page includes:
  - *Strength Areas*: Widely used descriptions of Maine by overnight visitors that drive a strong rating of the Overall Experience of Maine compared to other destinations.
  - *Maintenance Areas*: Widely used descriptions that do not do as much to drive a strong rating of the Overall Experience compared to other destinations.
  - *Improvement Areas*: Descriptions that were not widely used by overnight visitors that drive a strong rating of the Overall Experience compared to other destinations.
  - *Lower-Priority Improvement Areas* : Descriptions that were not widely used by overnight visitors that do not drive a strong rating.

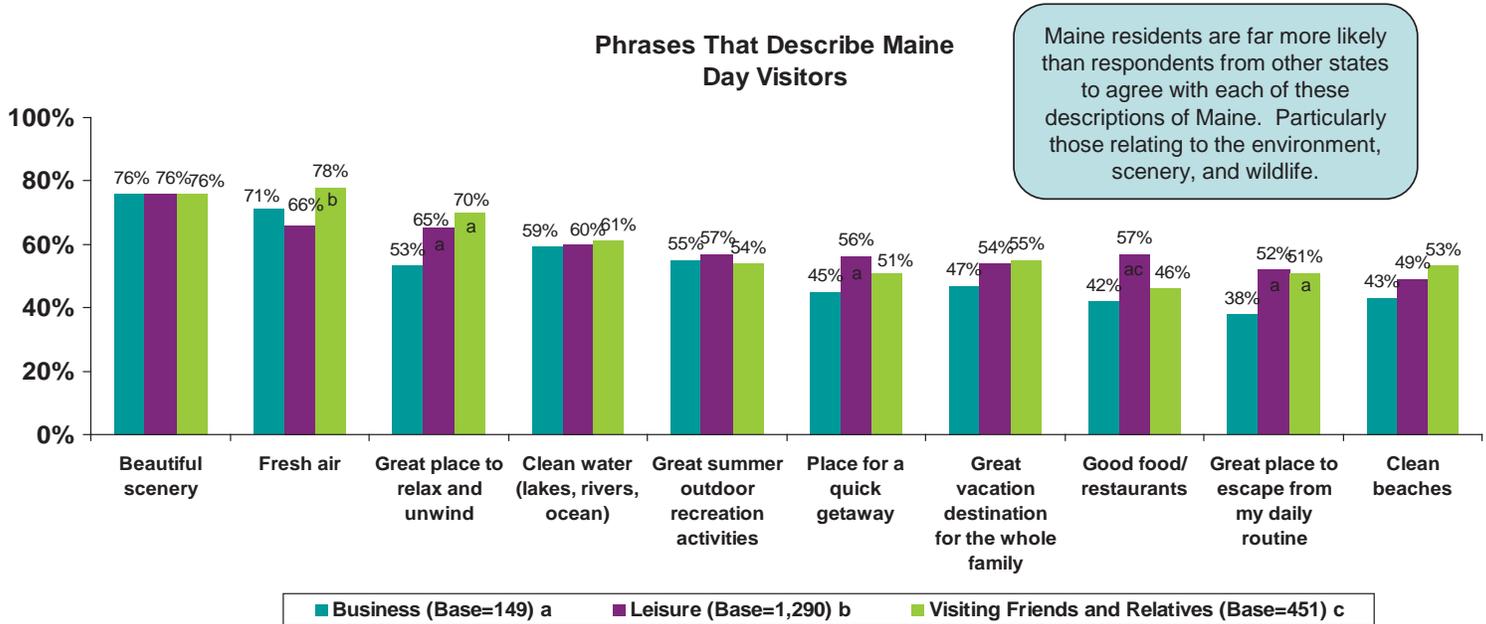
# Maine Quadrant Analysis Results



Regional Q34. Using the scale provided in the table below, please evaluate your trip in Maine as compared to other destinations you've visited. a,b,c notes significant difference at 95% confidence level.  
 Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination. (Please check as many or as few as apply)

# Descriptions of Maine Most Frequently Selected: Day Visitors

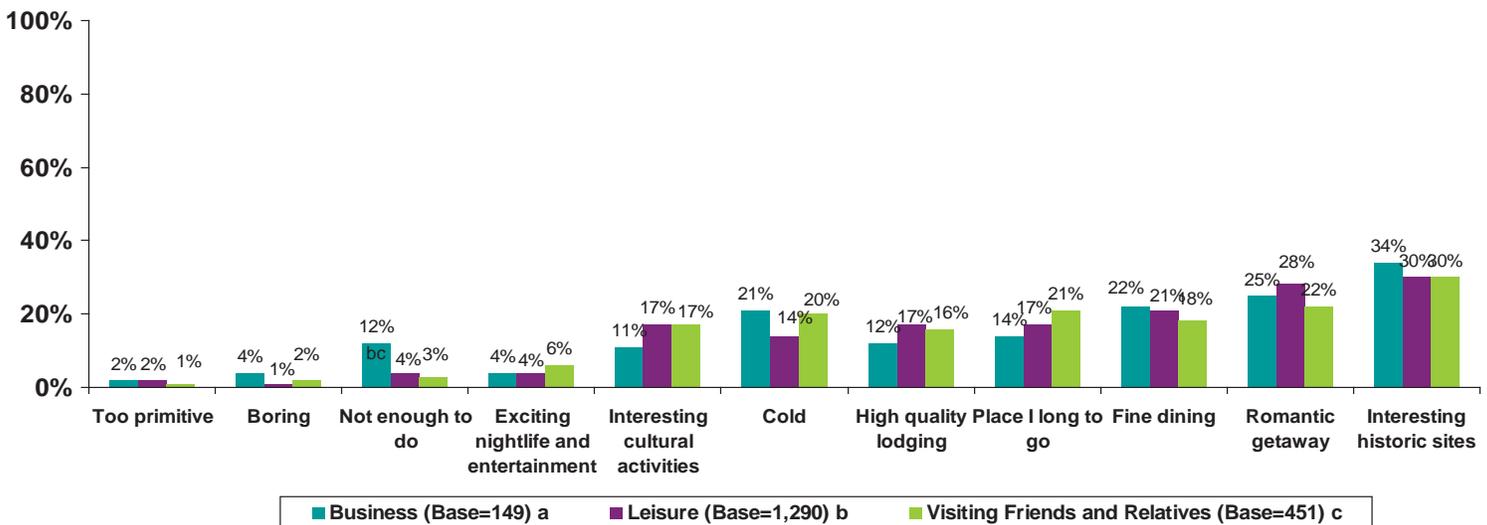
- In contrast to overnight visitors to Maine, the percentage of business day visitors who used the phrases below to describe the state was statistically on par with leisure and VFR day visitors.
- The primary exception to this was in calling Maine a great place to relax and unwind, which can be expected due to the nature of a business day visit.



Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination. (Please check as many or as few as apply.)  
 a,b,c, notes significant difference at 95% confidence level

# Descriptions of Maine Least Frequently Selected: Day Visitors

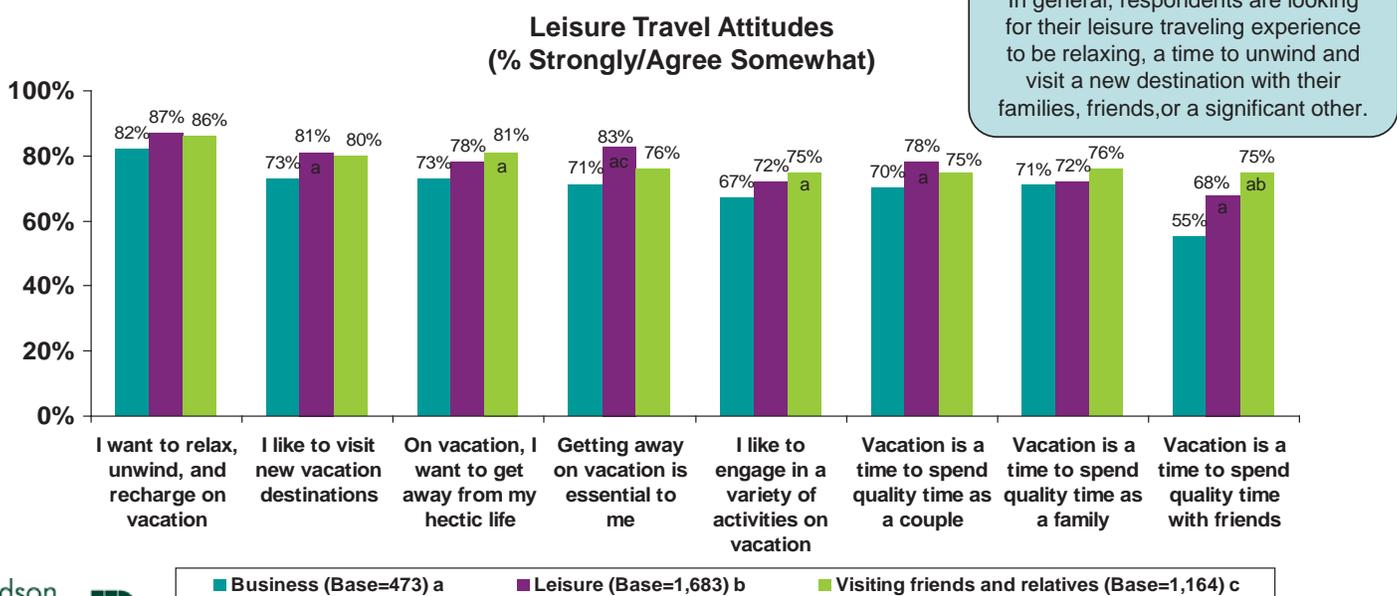
- Day visitors to Maine – like overnight visitors to Maine – are not likely to call Maine primitive or boring. Yet also as with overnight visitors, they are also not likely to call Maine a place with exciting nightlife, interesting cultural or historic attractions, or fine dining and lodging.



Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination. (Please check as many or as few as apply)  
 a,b,c, notes significant difference at 95% confidence level

# Attitudes Towards Leisure Travel – Most Agreed

- Maine overnight leisure visitors are significantly more likely than either business or VFR visitors to feel that “getting away on vacation is essential” to them.
- In line with their trip type, Maine overnight VFR visitors are significantly more likely than either leisure or business visitors to report that vacation is a good time to spend quality time with friends.
- Despite the fact that the question was focused on leisure travel attitudes, overnight business travelers were less likely than the other two segments to agree with several of the statements about relaxation and the importance of vacations.

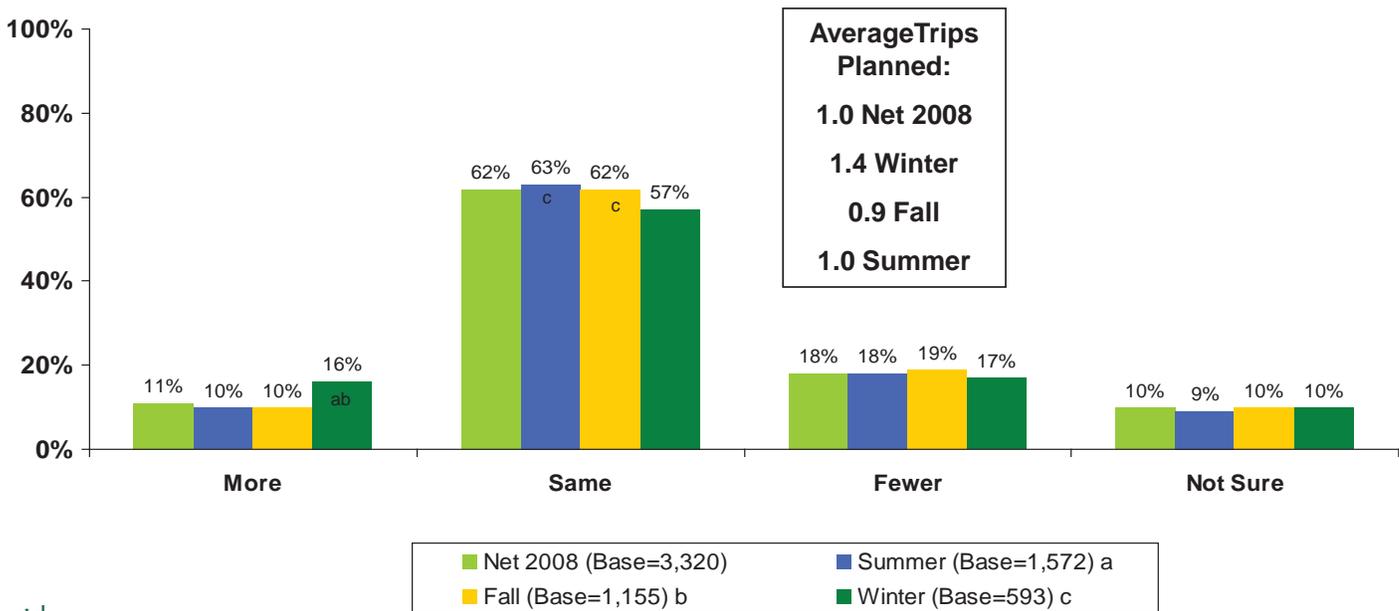


Regional Q47. Below is a list of statements about leisure travel. Please indicate how much you agree or disagree with each statement using the scale shown in the table below. a, b, c, notes significant difference at 95% confidence level

# Future Overnight Leisure Travel Intentions

- The percent of respondents who report that they plan to travel more on a year-over-year basis in the coming month was significantly higher in the winter as opposed to other seasons in 2008. As economic conditions, gas prices, and the exchange rate continue to fluctuate, year-over-year results for this question will provide particularly interesting insight into visitors' appetites for travel amidst an uncertain economic climate.

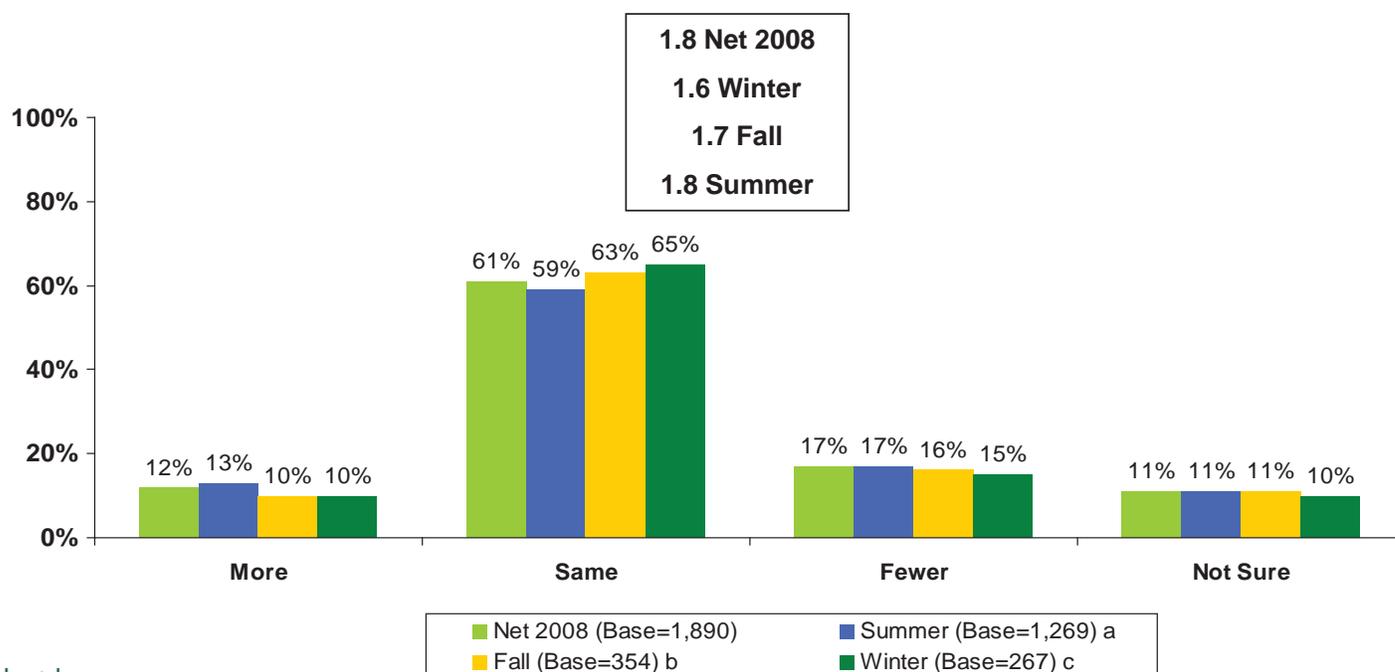
**Planned Leisure Trips in Next Month**



# Future Day Leisure Travel Intentions

- Unlike the travel intentions of overnight visitors, day visitors year-over-year travel intentions remained steady throughout 2008.
- As with the previous slide, year-over-year results for this data will be particularly interesting to gauge respondents' comfort level spending money on leisure travel in 2009.

**Planned Leisure Day Trips in Next Month**

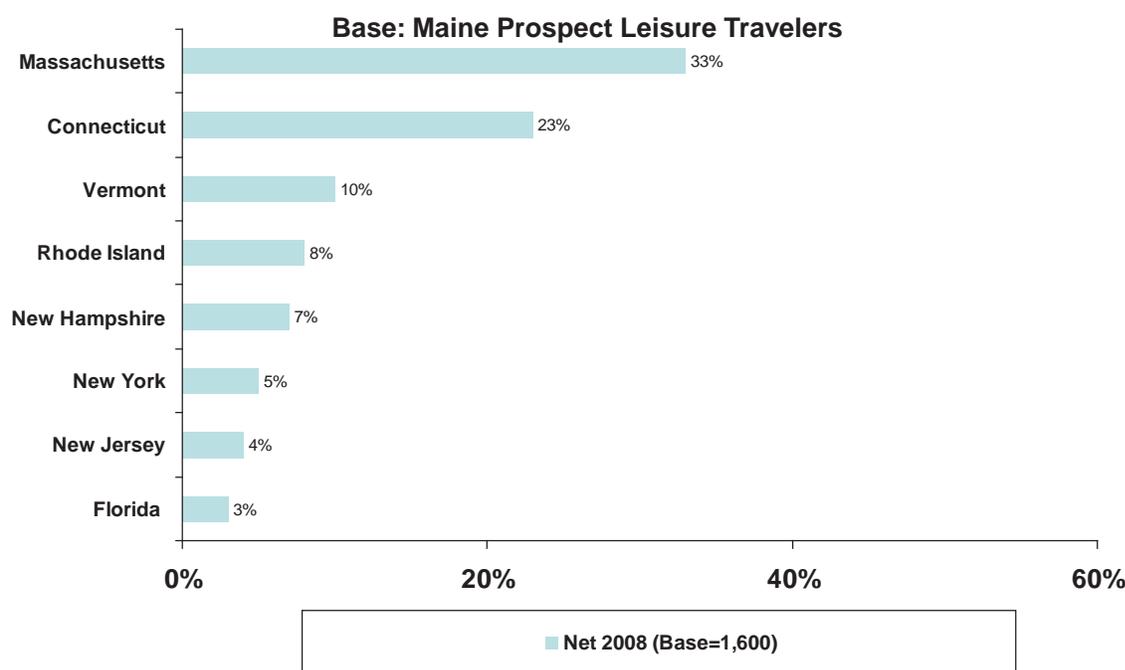


# Maine Visitor Prospects



# Where Prospects Traveled Instead of Maine

- Instead of traveling to Maine, one-third of prospects went to Massachusetts for their trip. This was followed by the one-quarter who went to Connecticut.
- Meanwhile, Vermont and New Hampshire were far behind the two leading states – both attracting one-tenth or less of the Prospect group in 2008.



# Prospects' Consideration of Maine as a Vacation Destination

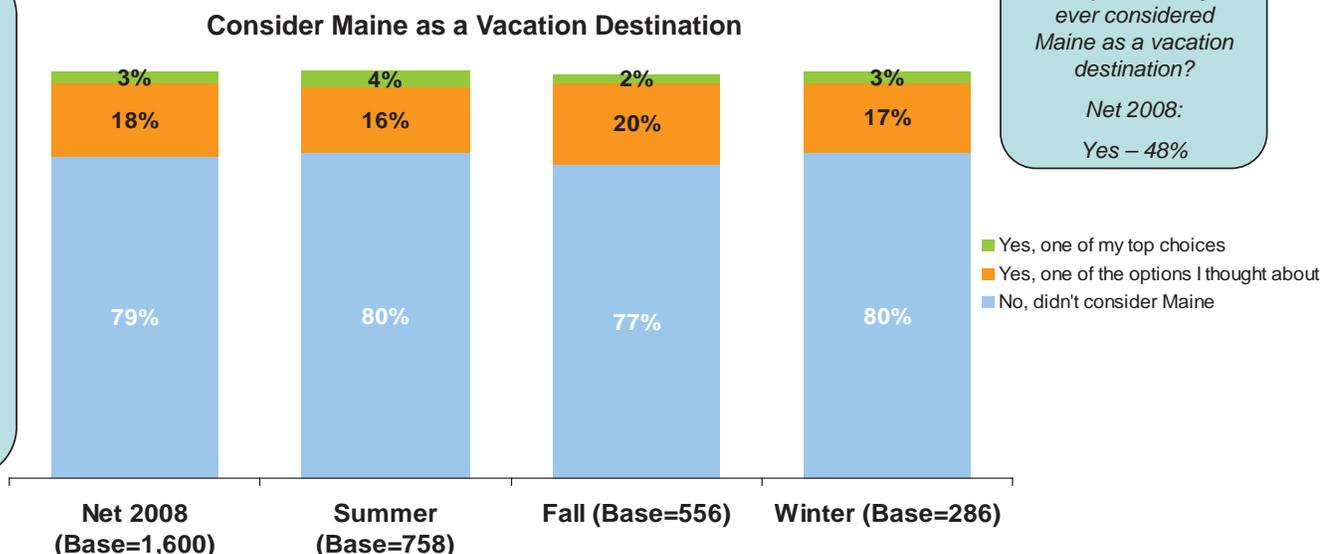
- While a clear majority of Maine Prospects did not consider Maine for their most recent leisure trip to a competing state – one half have considered Maine in the past.
- At the same time, the numbers from the previous slide show that many Maine Prospects would consider Maine for a future trip.

•32% of Maine Prospects report that they have taken a vacation or leisure trip to Maine in the past.

•65% of Maine Prospects report that they would consider Maine for a vacation or a short leisure trip in the future – even 61% of Maine Prospects who haven't been to Maine before report that they would consider it in the future.

*In the past, have you ever considered Maine as a vacation destination?*

Net 2008:  
Yes – 48%

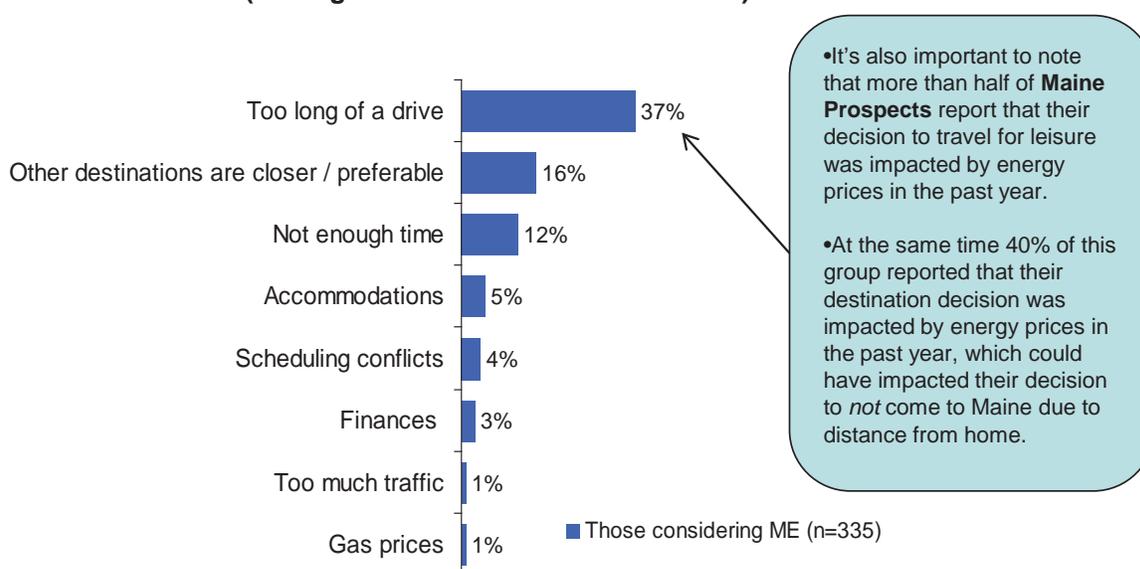


Regional Q76. Have you ever taken a vacation or leisure trip to Maine?  
 Regional Q78. While planning for your most recent visit in [state/province], did you consider Maine as a vacation destination?  
 Regional Q80. In the past, have you ever considered Maine as a vacation destination?  
 Regional Q81. In the future, would you ever consider traveling to Maine?

# Prospects' Reasons for Not Selecting Maine

- Of those who did consider Maine for their recent leisure trip, one-third did not choose the state because it was too far. As the next slide shows, distance is also an issue for the overall group of Maine Prospects.

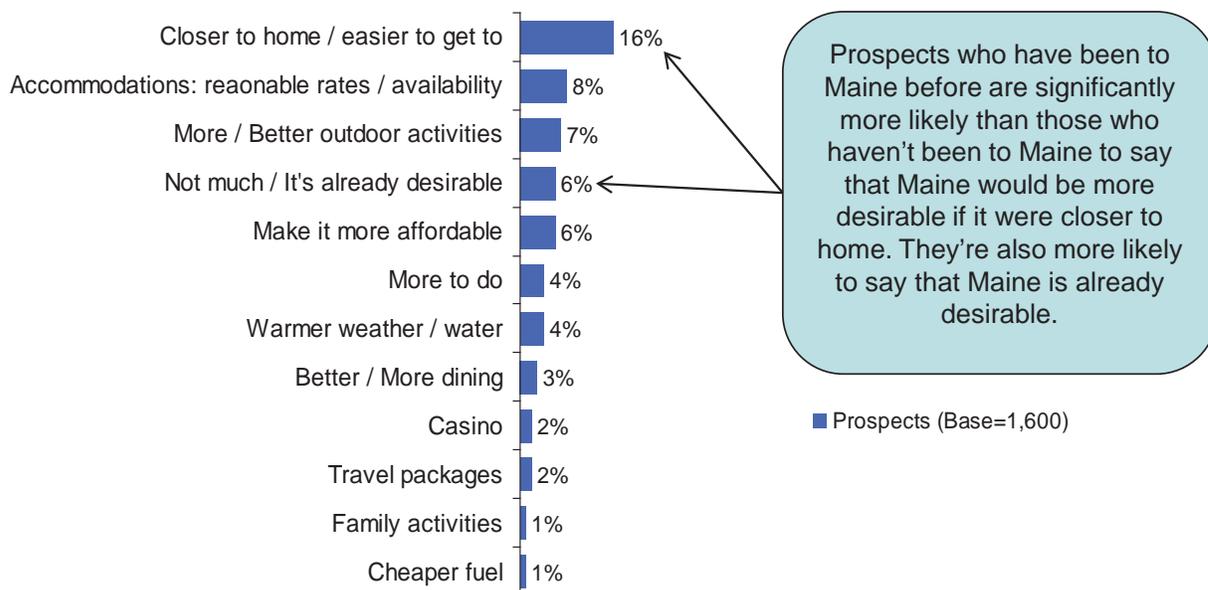
**Primary Reasons for Not Selecting Maine  
(Among Those Who Considered Maine)**



# How To Make Maine More Desirable to Prospects

- The most cited way to make Maine a more desirable place to visit among Maine Prospects is to make it closer to home/easier to get to. This answer received twice the percentage of the next most cited answer.

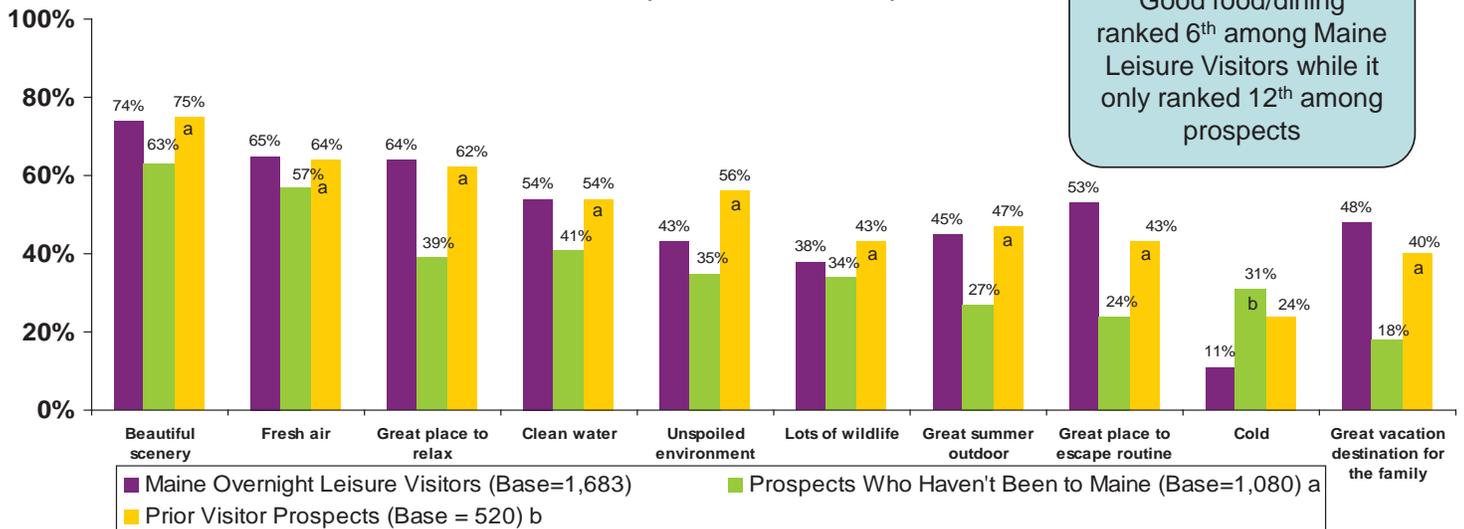
**What Maine Needs to Make it More Desirable to Prospects**



# Descriptions of Maine – Most Frequently Selected

- Maine Prospects who have been to the state before are equally likely as Maine leisure visitors to describe Maine using a variety of positive descriptions.
- However, Maine Prospects who haven't been to the state are less likely to apply these positive descriptions of Maine, likely due to their inexperience with the state.

**Phrases that Describe Maine**  
(Selected Attributes)



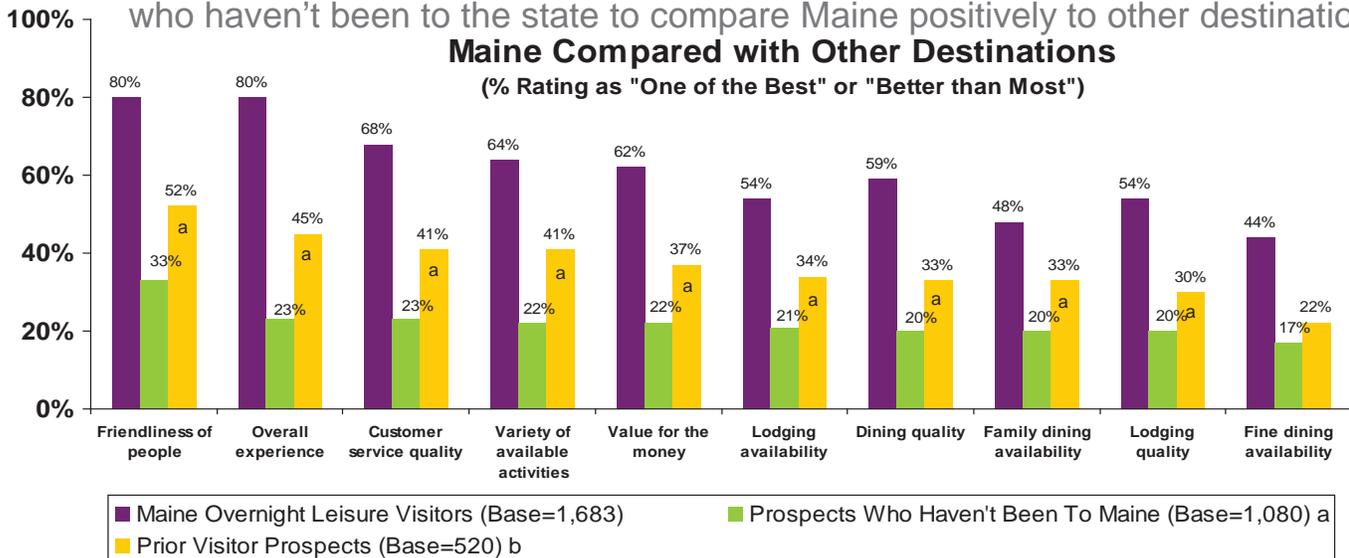
Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination. Please check as many or as few as apply.

Regional Q83. Although you may or may not have visited Maine in the past, from the list below, please select the phrases that you feel best describe Maine as a vacation destination. Please check as many or as few as apply.  
a,b,c, notes significant difference at 95% confidence level

# Evaluation of Maine as Vacation Destination

- While Maine Prospects who have been to Maine before use similar descriptions as Maine leisure visitors to describe the state, they are less likely to compare Maine positively to other destinations. This represents a large gap between the actual experience of a Maine visitor and the impression of what a Maine trip would be to non-visitors.
- Similar to the pattern seen with the descriptions of Maine on the previous slide, Maine Visitors who have been to Maine are significantly more likely than those who haven't been to the state to compare Maine positively to other destinations.

**Maine Compared with Other Destinations**  
(% Rating as "One of the Best" or "Better than Most")



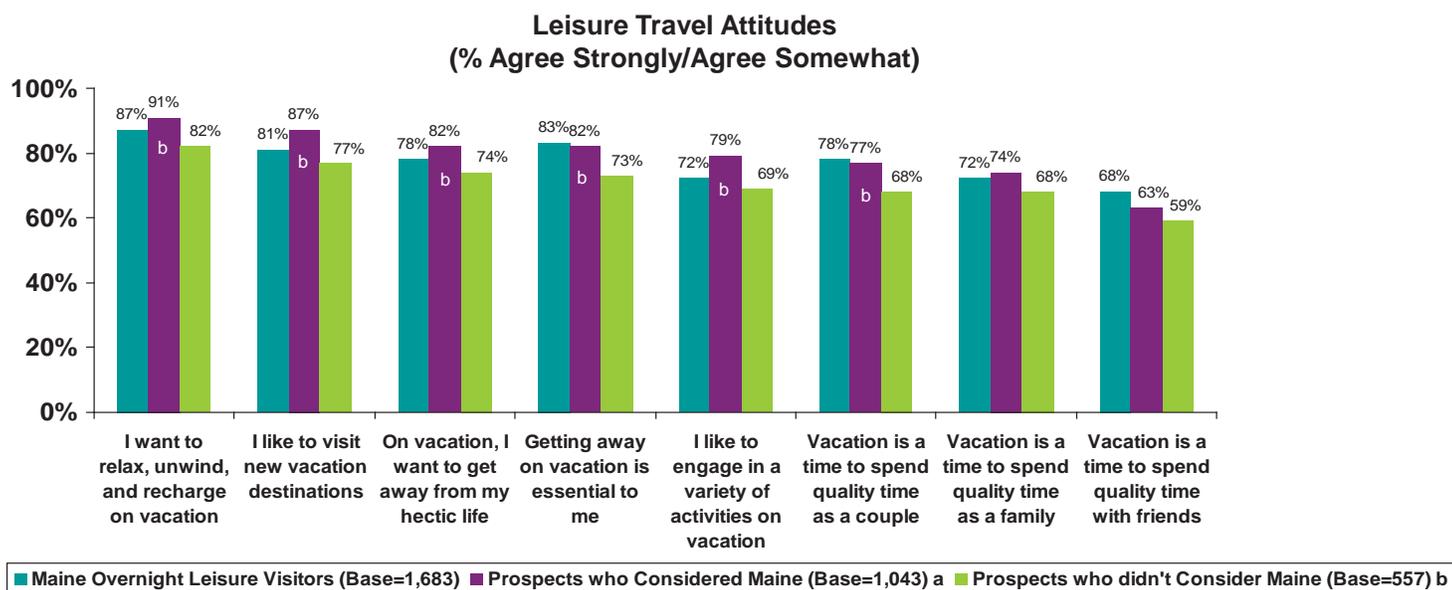
Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.

Regional Q84. Although you may or may not have visited Maine in the past, please indicate your impressions of Maine as a vacation destination as compared to other destinations you've visited using the scale below.

a,b,c, notes significant difference at 95% confidence level

# Attitudes Towards Leisure Travel – Most Agreed

- Attitudinally, Maine Prospects who considered Maine as a destination are significantly more likely than those who did not consider the state to agree with statements that relate to relaxation, escapism, adventure, and the necessity of travel.



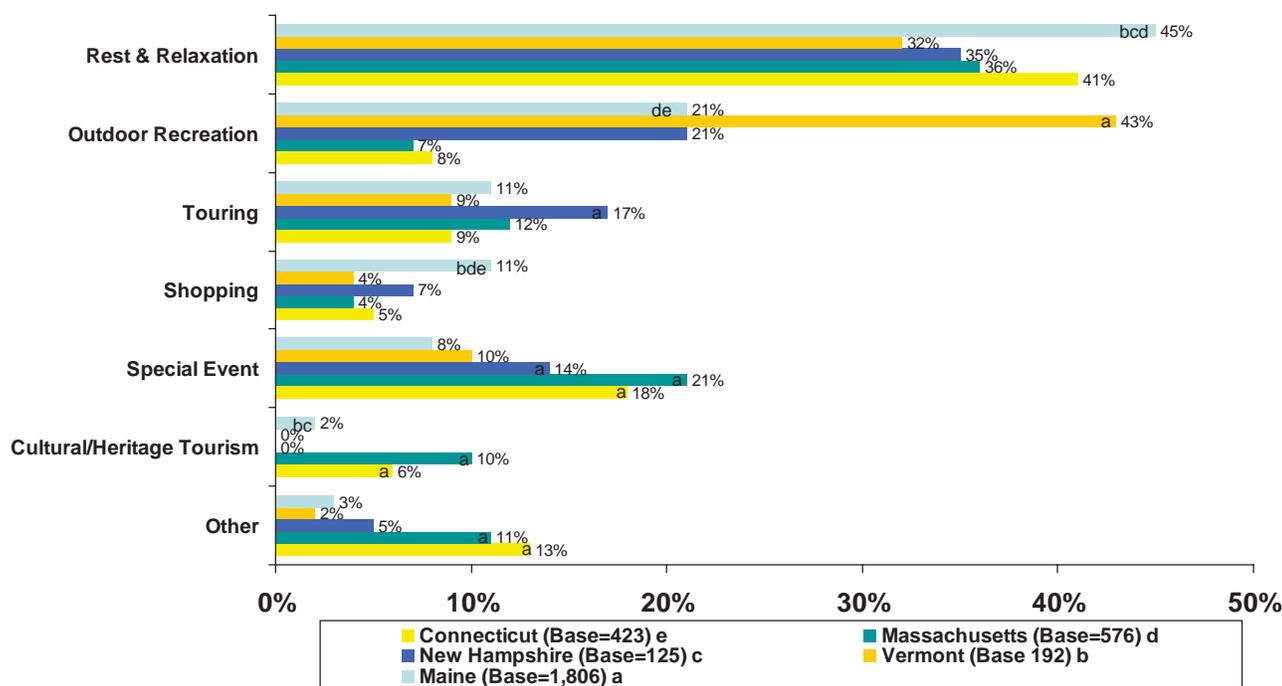
# An Overnight Trip to Maine vs. Prospects' Trips to NH, VT, MA, and CT



# Primary Purpose of Overnight Leisure Trips

- Prospects' leisure trips to Vermont were more focused on outdoor recreation than overnight visitors' leisure trips to Maine.
- Meanwhile, prospects' trips to Massachusetts and Connecticut were more focused on special events and cultural tourism than overnight visitors' leisure trips to Maine.

Primary Purpose of Overnight Leisure Trips

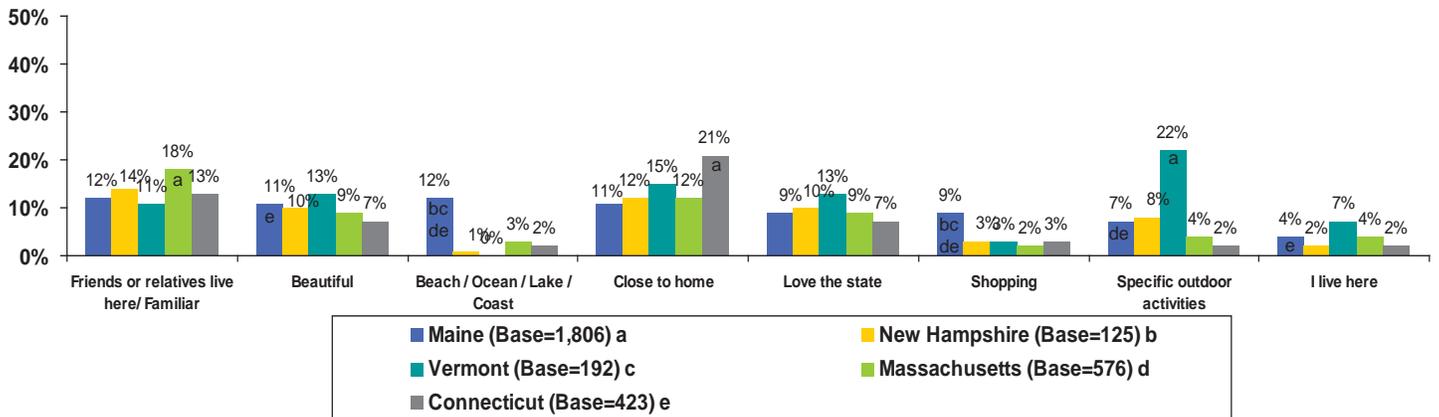


Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?  
 Regional Q55c. What was the primary purpose of the leisure trip to \_\_\_\_\_?  
 a,b,c notes significant difference at 95% confidence level. Tests on this slide are limited to ME v. NH/VT/MA/CT.

# Reasons for Selecting Destination

- In accordance with the primary reason for the trip, the top reason why prospects chose Vermont for their overnight leisure trip were specific outdoor activities.
- Overnight leisure visitors to Maine were more likely to select the beach/ocean/lake/coast or shopping as reasons why they chose to come to the state.

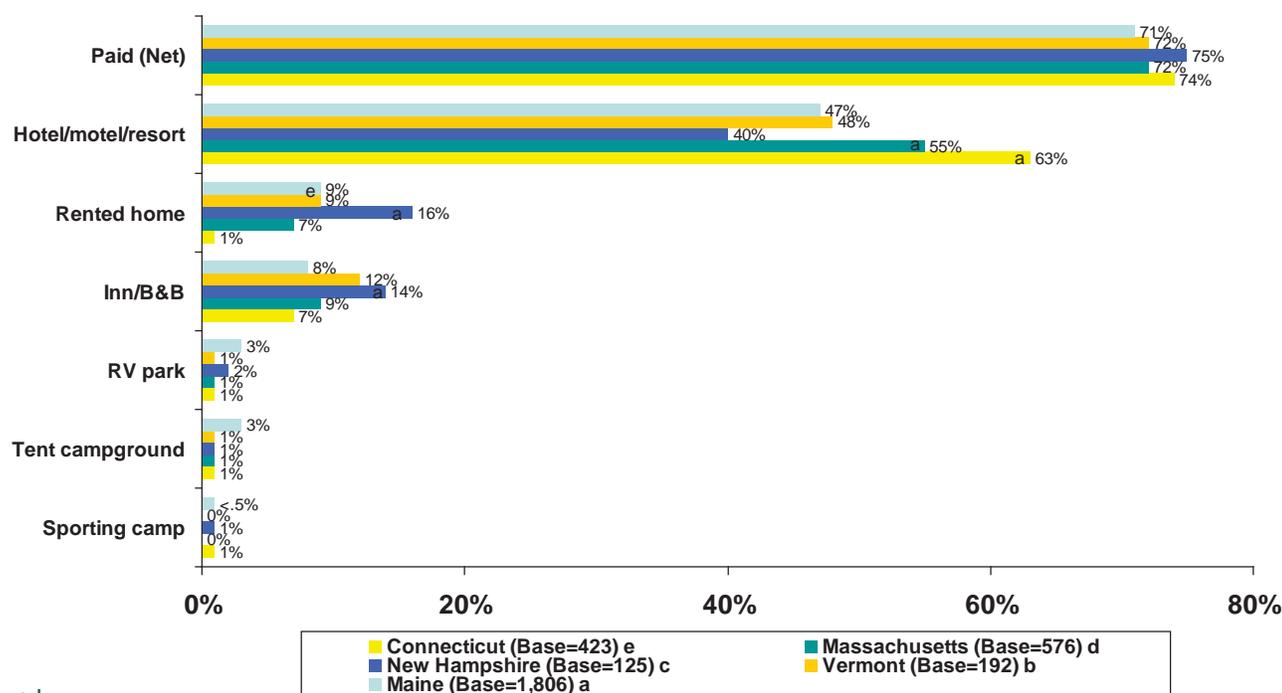
Reasons for Selecting Leisure Trip Destination



# Accommodation Type on Leisure Trip

- Overnight leisure visitors to New Hampshire are more likely than visitors to Maine to stay in a rented home or Inn/B&B.
- Leisure visitors to Massachusetts and Connecticut were more likely than leisure visitors to Maine to stay in a hotel, motel, or resort during their stay.

Primary Accommodations

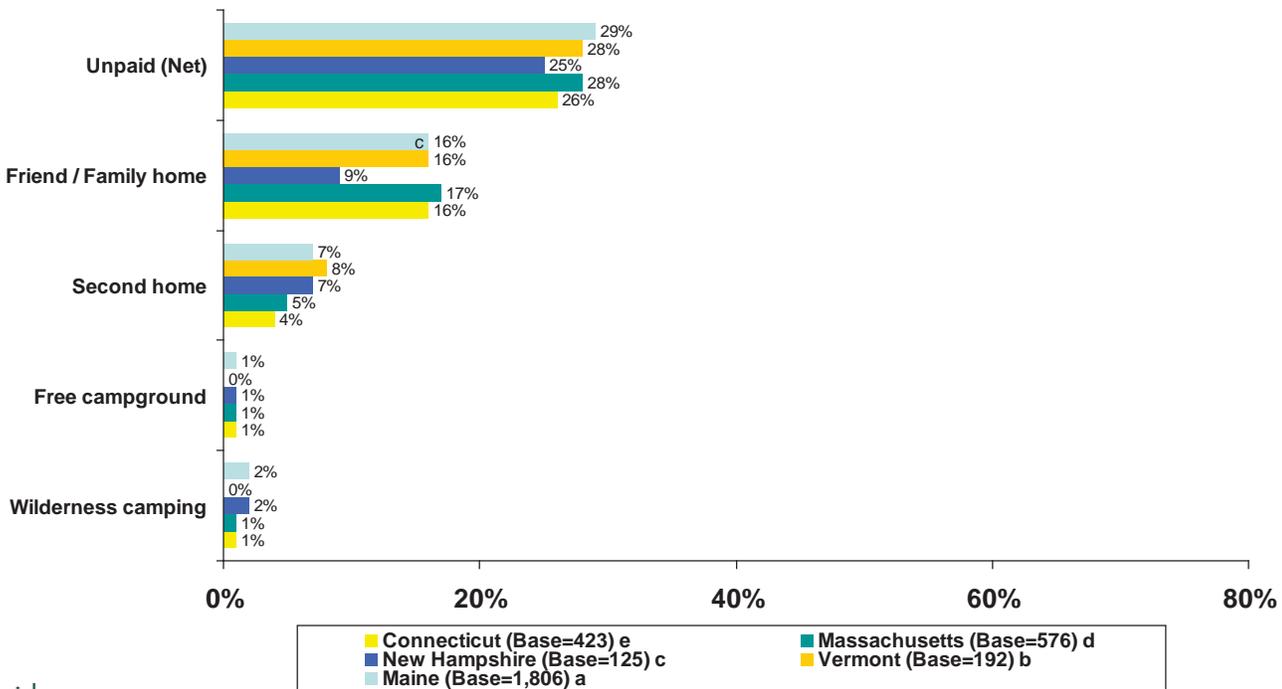


Regional Q27. In which of the following types of accommodations did you spend the most nights in Maine? Regional Q70. In which of the following types of accommodations did you spend the most nights in \_\_\_\_? a,b,c significant difference at 95% confidence level. Tests on this slide are limited to ME v. NH/VT/MA/CT.

# Accommodation Type on Leisure Trip - Continued

- Across the destinations, between one-quarter and one-third of overnight guests stay in unpaid accommodations – usually family/friends’ homes.

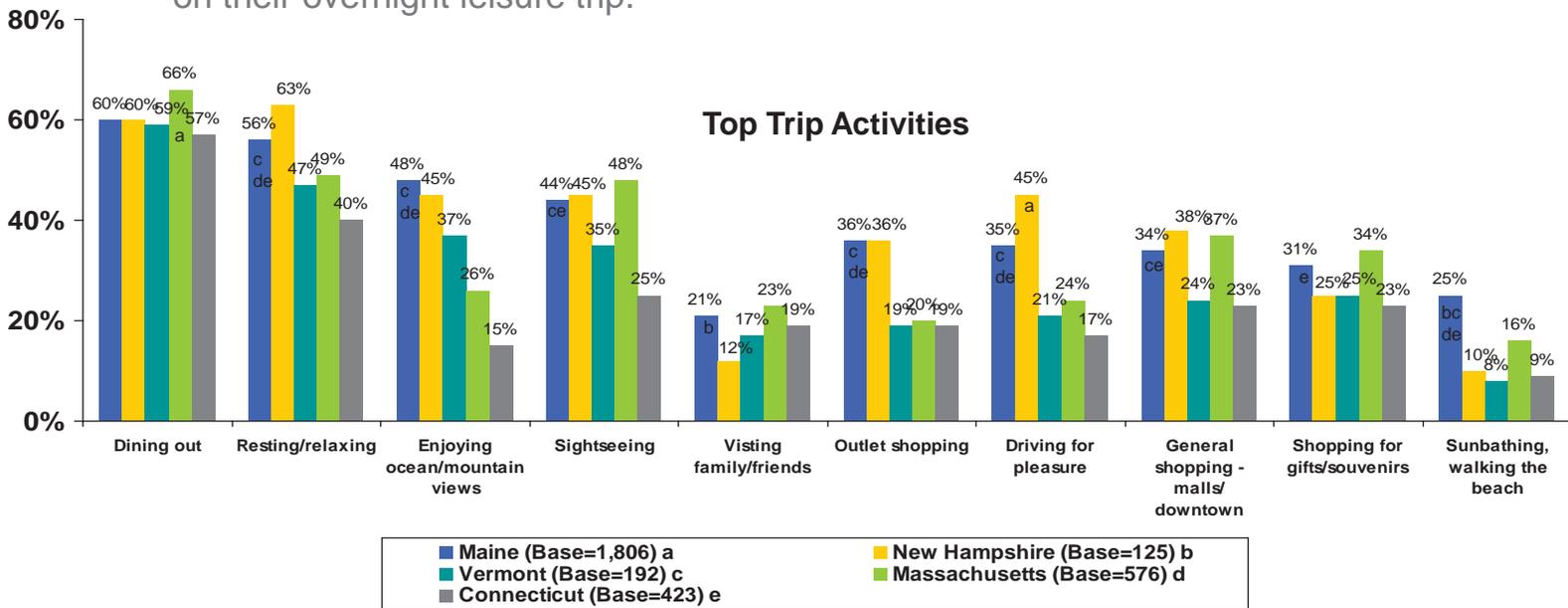
Primary Accommodations



Regional Q27. In which of the following types of accommodations did you spend the most nights in Maine?  
 Regional Q70. In which of the following types of accommodations did you spend the most nights in \_\_\_\_?  
 a,b,c significant difference at 95% confidence level. Tests on this slide are limited to ME v. NH/VT/MA/CT.

# Leisure Trip Activities

- With few exceptions, overnight leisure visitors to Maine and New Hampshire both report engaging in similar activities while on their trips.
- At the same time, Maine overnight visitors are significantly more likely than Vermont, Massachusetts, or Connecticut overnight visitors to say that they relaxed, enjoyed ocean/mountain views, shopped at outlets, or sunbathed while on their overnight leisure trip.

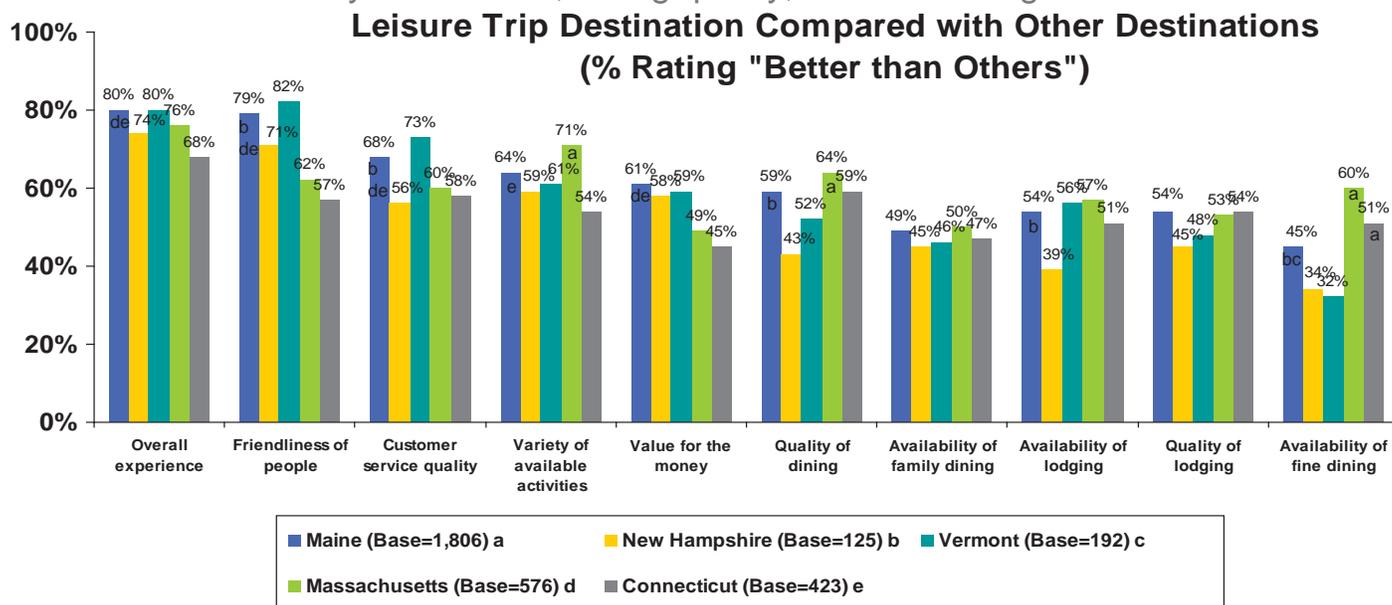


Regional Q32. In which of the following activities did you participate during this trip/your most recent trip in Maine? (Please check all that apply)

Regional Q71. In which of the following activities did you participate during this trip/your most recent trip in Maine? (Please check all that apply) a,b,c significant difference at 95% confidence level. Tests on this slide are limited to ME v. NH/VT/MA/CT.

# Evaluation of Leisure Trip Compared to Other Destinations

- Overnight leisure visitors to Maine and Vermont rate those respective destinations similarly when compared to other destinations. Interestingly, ratings for New Hampshire lagged on several attributes.
- Maine fares well compared to Massachusetts and Connecticut with the overall experience, friendliness, customer service and value. But Massachusetts trumps Maine on variety of activities, dining quality, and fine dining.



Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.

Regional Q72. Using the scale provided in the table below, please evaluate your trip in \_\_\_\_\_ as compared to other destinations you've visited. a,b,c significant difference at 95% confidence level. Tests on this slide are limited to ME v. NH/VT/MA/CT.

# Comparing Maine Visitors, Prospects, and Future Opportunities



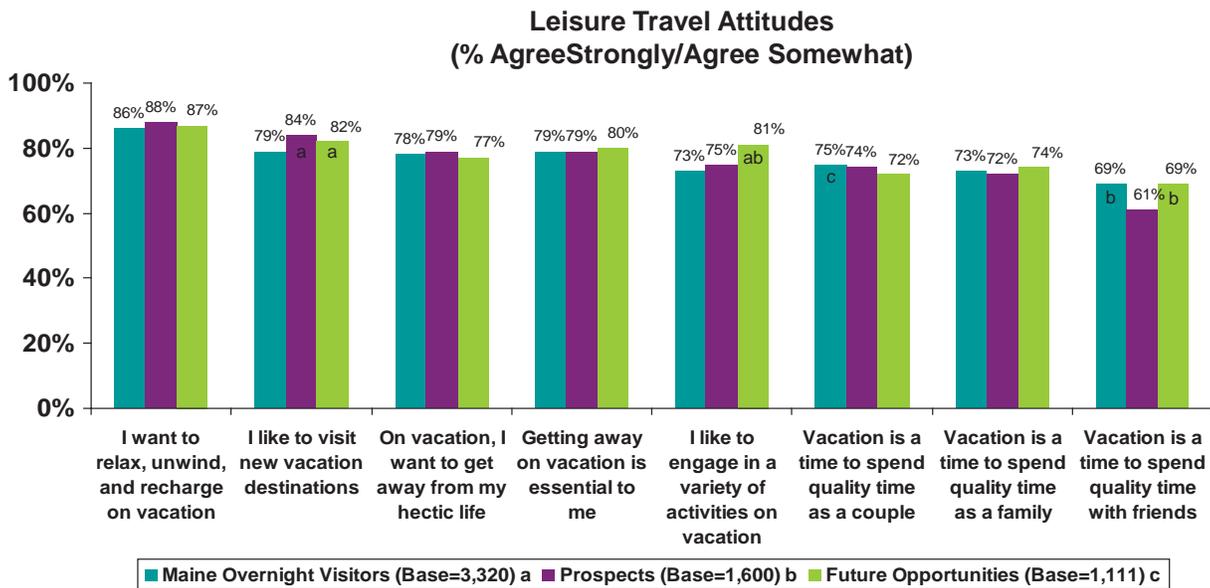
## Demographics

- Maine Overnight Visitors, Prospects, and Future Opportunities share a similar demographic profile.
- The primary differences between the groups include a higher percentage of Future Opportunities are between age 35-44 and they have a higher mean income than do Maine Overnight Visitors.

	ME Overnight Visitors (Base=3,220) a	Prospects (Base=1,600) b	Future Opportunities (Base=1,111) c
Mean Age	41.9	42.4	41.8
< 35	38%	38%	36%
35 - 44	19%	18%	26%
45 - 54	18%	17%	14%
55 +	25%	27%	24%
Mean Income	\$103,400	\$103,700	\$107,370
< \$50,000	16%	19%	18%
\$50,000 - \$99,000	36%	39%	37%
\$100,000 +	39%	43%	45%
Female	45%	47%	48%
College Degree or Higher	76%	69%	75%
Married	55%	56%	54%
Employed Full Time	65%	60%	61%

# Attitudes Towards Leisure Travel – Most Agreed

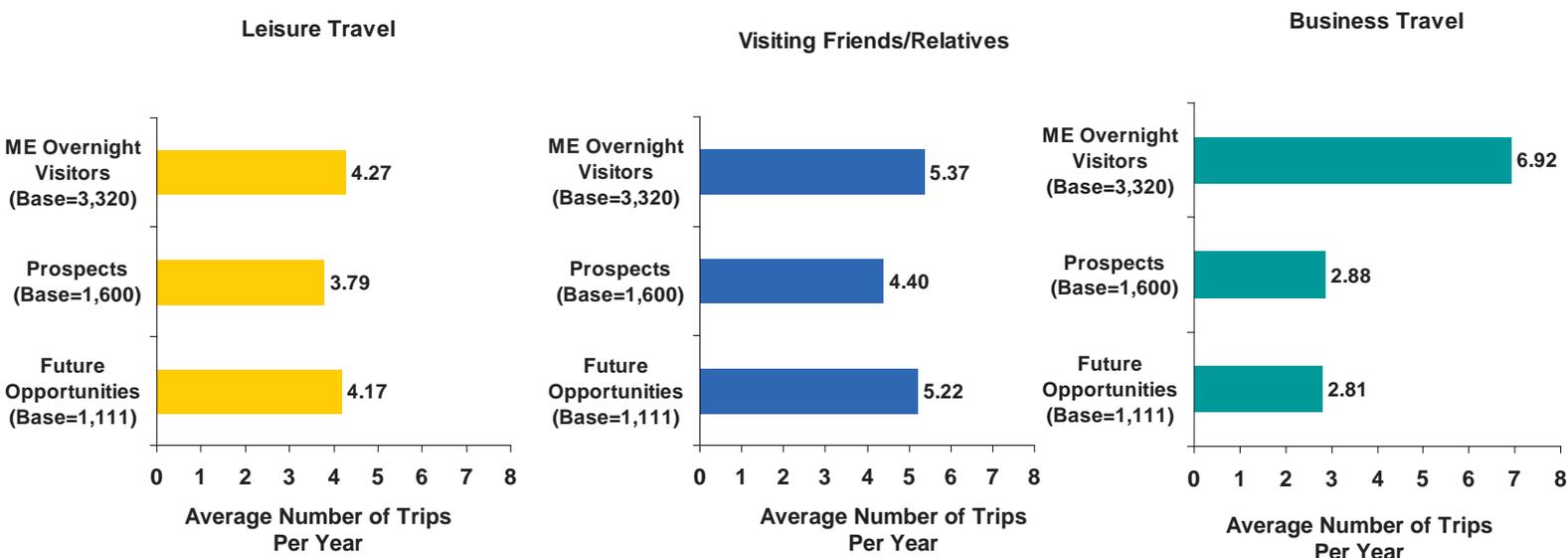
- Comparing the attitudes of Maine Overnight visitors with Prospects and Future Opportunities, both Prospects and Future Opportunities are significantly more likely to report that they like to explore new vacation destinations.
- Future Opportunities are also significantly more likely than both Maine Overnight Visitors and Prospects to say that they like to engage in a variety of activities while on vacation.



Regional Q47. Prospects Q92. Future Opportunity Q112. Below is a list of statements about leisure travel. Please indicate how much you agree or disagree with each statement using the scale shown in the table below. a,b,c, notes significant difference at 95% confidence level

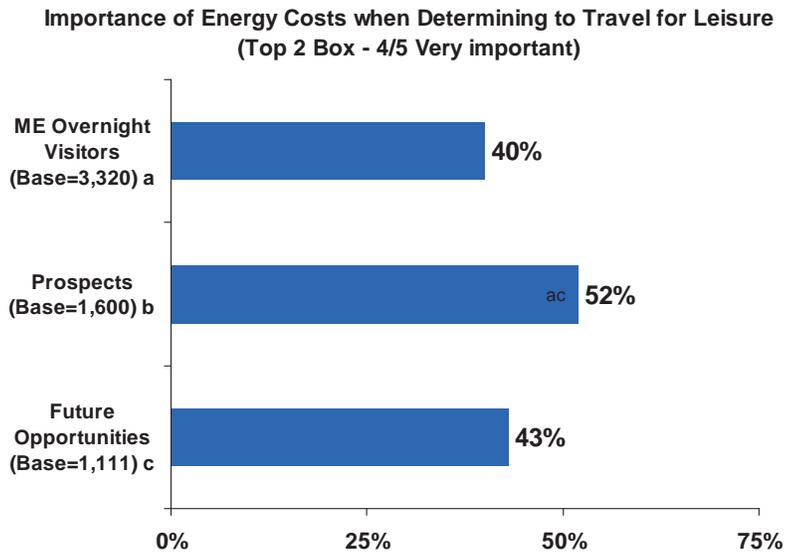
# Travel Frequency by Travel Type

- Visitors to Maine are generally more frequent travelers than are Prospects or Future Opportunities.
- Prospects take slightly fewer leisure and VFR trips than Maine Overnight Visitors and Future Opportunities on average.
- Maine Overnight Visitors take twice as many business trips on average than either Prospects or Future Opportunities.



# Importance of Energy Costs on the Decision to Travel

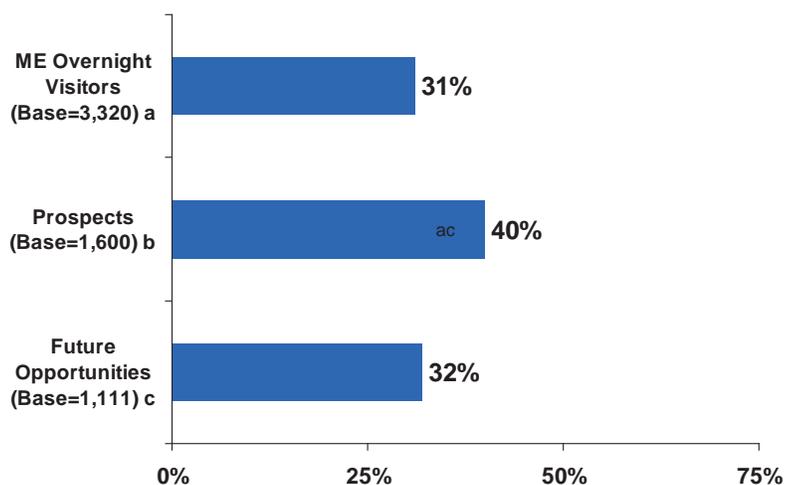
- Not only do Prospects travel slightly less on average than Maine Overnight Visitors or Future Opportunities, but their decision to travel for leisure was also significantly more likely to be impacted by energy prices in the past year.



# Importance of Energy Costs on Destination Decisions

- To follow up from the previous slide, Prospects' destination decisions were also more likely than Maine Overnight Visitors or Future Opportunities to be impacted by energy prices in the past year.
- This fact could have played a role in why some of these prospects did not come to Maine in 2008, especially in light of the fact that proximity to home was a top reason why Prospects did not come to Maine.

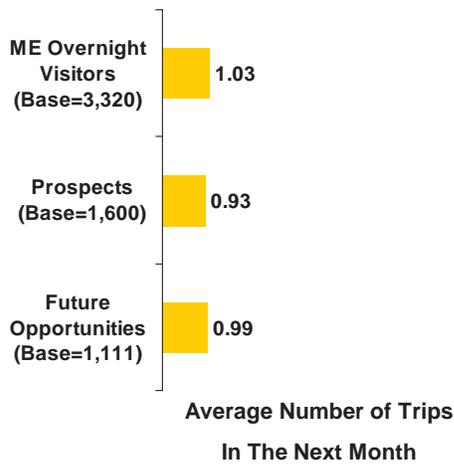
**Extent Energy Cost Figured into Most Recent Leisure Trip Destination  
(Top 2 Box - 4/5 Very important)**



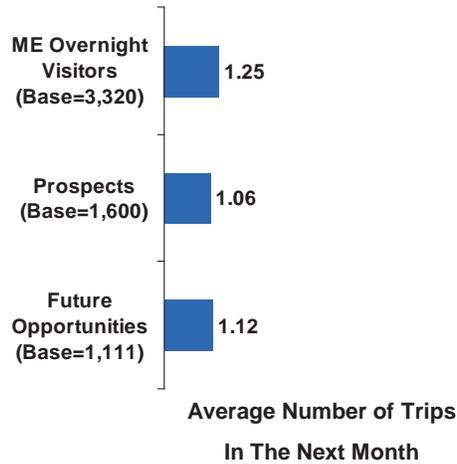
# Number of Intended Trips in Next Month

- Future travel intentions by trip type are very consistent across the three travel segments.

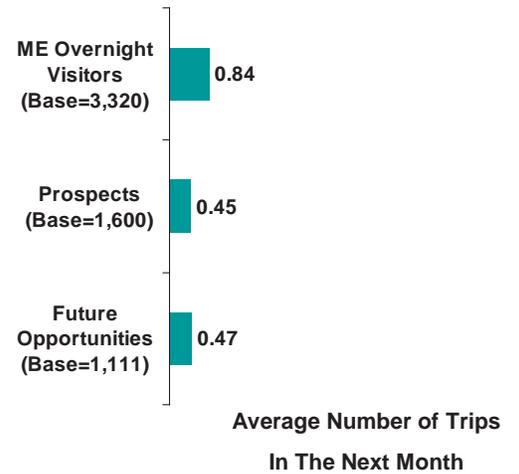
Leisure Travel



Visiting Friends/Relatives



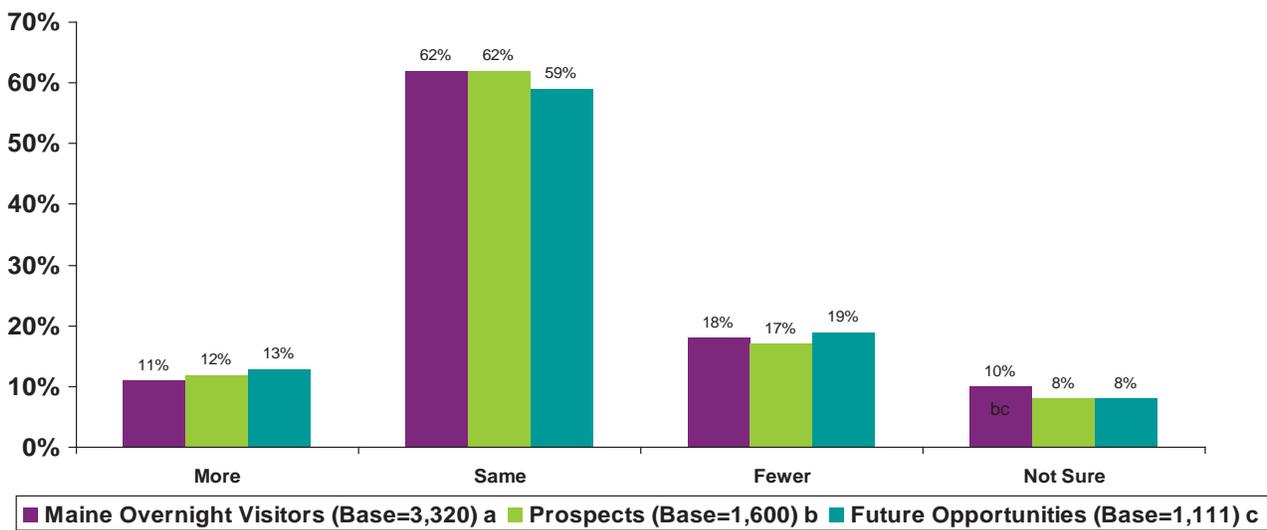
Business Travel



# Year-Over-Year Travel Frequency Comparison: Leisure

- Despite the economic climate, most respondents in each travel segment report that they will take the same number of leisure trips this year as they did last year at this time.

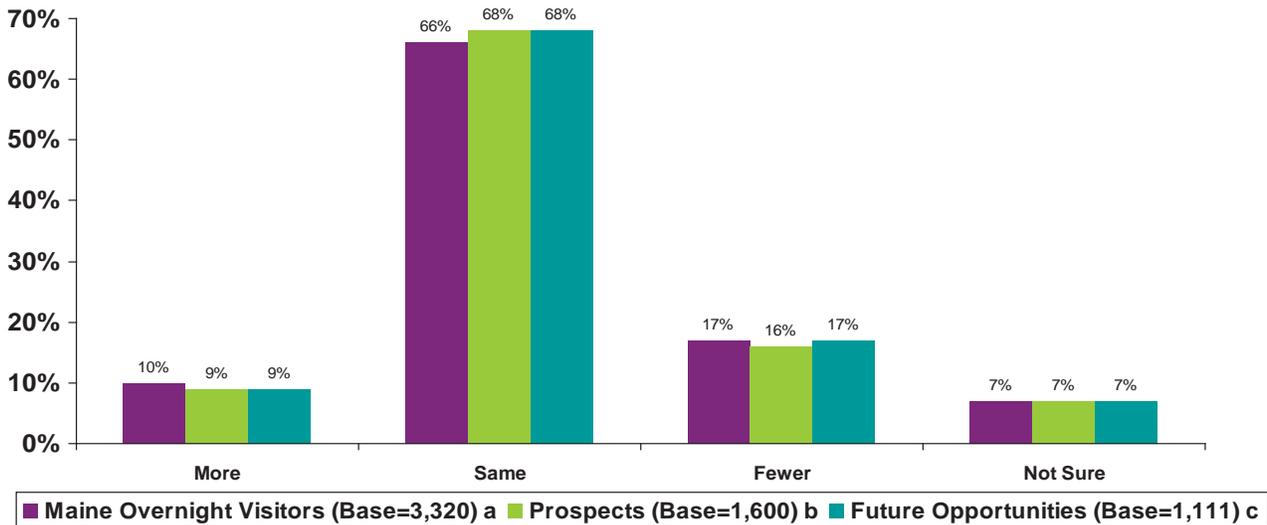
Year-over-year travel frequency comparison



# Year-Over-Year Travel Frequency Comparison: VFR

- Two-thirds of each travel segment reported that they will take the same number of trips to visit family and friends as they did last year.
- The higher percentage of respondents who report that their VFR travel frequency will stay the same -- compared to other trip types -- is likely related to the decreased costs associated with this type of travel as well as the draw/responsibility to visit family and friends.

Year-over-year travel frequency comparison

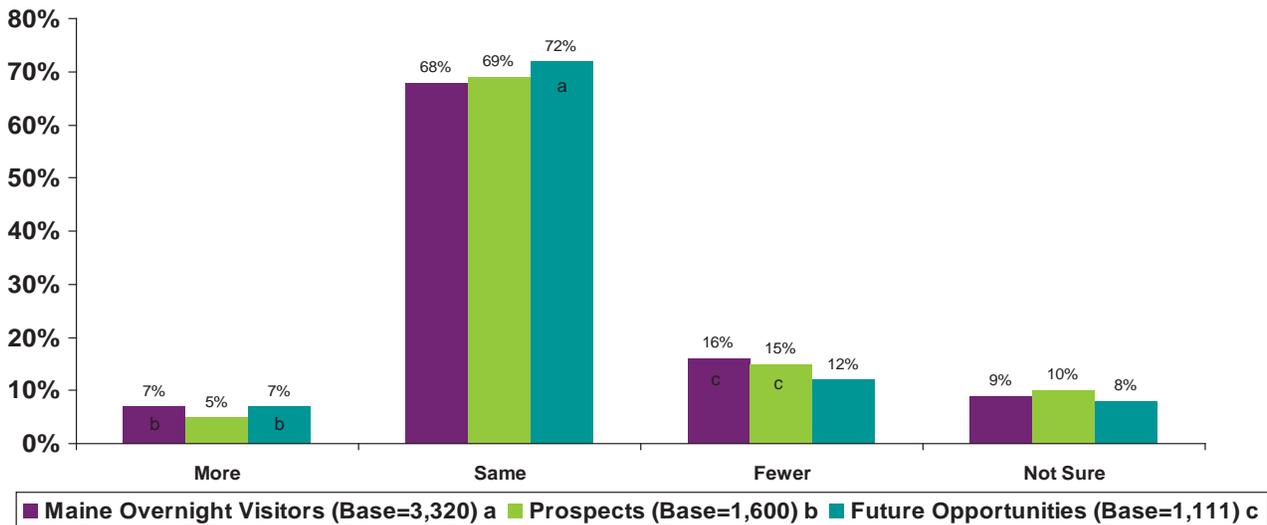


Regional Q46, Regional Q91. Regional Q111. In the next month, how many trips to you plan to take anywhere to visit friends or relatives – Is this more, the same, or fewer than the number of VFR trips during this same time last year? a,b,c, notes significant difference at 95% confidence level

# Year-Over-Year Travel Frequency Comparison: Business

- While aggregated year-over-year business travel frequency comparisons show similar patterns to VFR travel, there are significant differences across the travel segments. For example, Future Opportunities are significantly more likely to report that they will take the same number of business trips this year, while Maine Overnight Visitors and Prospects are both more likely to say that they will take fewer business trips during this period.

Year-over-year travel frequency comparison



Regional Q46, Regional Q91. Regional Q111. In the next month, how many trips to you plan to take anywhere for business – Is this more, the same, or fewer than the number of business trips during this same time last year? a,b,c, notes significant difference at 95% confidence level

# Summary & Conclusions



## Key Visitor Figures

- There were an estimated 6.2 million overnight trips and 6.4 million day trips to Maine in 2008, resulting in 15.4 million overnight visitors and 16.5 million day visitors to the state.
- Overnight visitors to Maine spent an estimated \$5.8 billion on goods and services during their trip while day visitors spent a \$1.65 billion in the state.
- Maine received 1% of the US leisure travel market in 2008 while receiving 0.7% of the VFR travel market and 0.6% of the business travel market. Each of these figures trail Massachusetts and Connecticut but are higher than other New England States.

# Trip Snapshot: Overnight Travel to Maine

- Overnight travelers cite a variety of reasons for selecting Maine. VFR visitors primarily report that their friends and family who are in the state are a primary draw. While leisure travelers also cite friends and family, they are equally likely to talk about the beauty, it's proximity to home, the coast, and shopping.
- About one-fifth of overnight visitors to Maine are from Massachusetts while another one-fifth are from New York, these two states represent the top two states of residence for overnight visitors. New Jersey is a distant third, representing 8% of overnight visitors.
- Approximately one-quarter of overnight visitors to Maine report that the Southern Maine Coast was their primary destination. This was followed by Greater Portland, Downeast/Acadia, and the Mid-Coast region, each of which received approximately half that percentage of overnight visitors.

## Trip Snapshot: Overnight Travel to Maine (continued)

- The vast majority of overnight visitors are repeat visitors. In fact, 40% of leisure overnight visitors took their first trip to Maine prior to 1980. Conversely, relatively few overnight visitors are new to the state in the past 5-10 years.
- Nearly half of overnight leisure visitors to Maine say that rest and relaxation was the primary purpose of their trip. This was followed by approximately one-fifth of this group who came to Maine with outdoor recreation as their primary purpose.
- More than half of overnight leisure visitors report shopping, dining out, and resting and relaxing while on their trip to the state. A second tier of activities included general sightseeing as well as enjoying the ocean/mountain views.
- Trip highlights for overnight leisure visitors included the scenery, outdoor activities, the beach/ocean/lakes/rivers, or a specific location that they visited during their trip to the state.

## Trip Snapshot: Overnight Travel to Maine (continued)

- During their overnight trip to Maine, Canadian visitors spend more on average than US visitors, Leisure visitors spend more than business or VFR visitors, and first-time visitors spend more than repeat visitors.
- As for what could have been improved, overnight visitors were most likely to report that they wish they had more time to spend in Maine or that they wish the weather had been better during their visit. Given the poor weather throughout June 2009, this trend in the data is likely to continue in the Summer 2009 topline report.
- At least 90% of overnight visitors from each trip type report that they're likely to return to Maine. Similarly, at least 90% of overnight visitors from each trip type say that they'd recommend Maine as a travel destination to family and friends.

## Trip Snapshot: Day Travel to Maine

- The more widely-cited reasons to select Maine for a day trip include the state's proximity to home for day visitors, friends and family who live in the state, and shopping. Throughout the report – including overnight and day visitors – shopping repeatedly surfaced as an important activity for Canadian visitors to the state.
- Just under one-half of day visitors to Maine are residents of the state. This is followed by approximately one-quarter who are from Massachusetts, 13% who are from New Hampshire, and 11% from New Brunswick.
- As with overnight visitors, the largest percentage of day visitors to the state report that the Southern Maine Coast was the primary region they visited. This is again followed by Greater Portland, Downeast/Acadia, and the Mid-Coast regions.

## Trip Snapshot: Day Travel to Maine (continued)

- Unlike overnight visitors, shopping was the most widely-cited primary purpose of day visitors' trip to Maine. As alluded to in the previous slide, this was especially the case for Canadian day visitors. Aside from shopping, other day visitors reported that outdoor recreation or rest and relaxation were the reasons why they selected the state for their visit.
- Also in contrast to overnight visitors, day visitors are less likely to report that they rested, enjoyed the views, or went sightseeing on their day visit to Maine. Instead, they are almost as likely as overnight visitors to say that they shopped and dined out during their trip.
- In accordance to day visitors' primary purpose of their trip to Maine, the top highlight among day leisure visitors was shopping. Meanwhile, VFR visitors point to time with family and friends as their highlight while business travelers point to the scenery.

## Trip Snapshot: Day Travel to Maine (continued)

- As was the case among overnight visitors to the state, day visitors are most likely to report that better weather and more time to spend in the state are aspects of the trip that could have been better. Aside from these top two reasons, cheaper gas prices were also cited as something that could have been better – likely a function of the 2008 gas price spike throughout the summer and fall.
- Likelihood to return to Maine and the likelihood to recommend Maine as a destination are all comfortably in the 90%-100% range among day visitors to the state. Impressively, there are no significant differences among day trip types in the responses to these questions. This shows a very strong attachment between day visitors and the state.

# Prospects and Opportunities

- There is little that is intrinsically different between people who visited Maine for a recent overnight trip, prospects who visited another state in the region – but not Maine, and future opportunities who live in the region but did not visit Maine or a key competitive state. They report similar demographic characteristics and attitudes towards travel. However, prospects are less frequent travelers and were more likely to have been impacted by gas prices last year.
- One-third of prospects visited Massachusetts and one-quarter visited Connecticut as opposed to Maine for their recent overnight leisure trip.
- While few prospects considered Maine for their most recent overnight leisure trip, there is clear opportunity for Maine to bring these people back to the state in the future. One half considered Maine for a vacation in the past and two-thirds would consider it for a future trip.

## Prospects and Opportunities (continued)

- The primary inhibitor that kept prospects from visiting Maine was that it was too long of a drive for their recent trip. Accordingly, distance was the top item selected as to how Maine can become a more desirable destination.
- While the state cannot control its location, it can highlight the ease with which regional tourists can get to the state as something to ease these concerns among prospects. Highlighting some gateway destinations that are not a long drive to these prospects can also soften the perception that it takes too long to get to Maine for a getaway.
- There is also a perception issue among prospects – especially those who haven't been to the state before. They are less likely than Maine's overnight visitors to agree that different positive phrases describe the state or that the state favorably compares to others among different positive attributes. A key in attracting more prospects will be to focus on decreasing the delta between overnight visitors to the state and prospects to make Maine a more appealing destination.

# Conclusions

- The importance of the Internet and word-of-mouth can't be underestimated for the trip-planning process. This highlights the importance of deliberately fostering positive word-of-mouth about the state as well as a thorough Internet strategy including additional detailed mapping services as well as more accommodation and local event information on VisitMaine.com.
- While the Internet is a primary source of trip planning information, some visitors – particularly older visitors and Canadian visitors – still rely on offline sources like travel books, guides, and travel agents. Therefore, these sources continue to be important despite the continued ascension of the Internet as a travel planning source.
- There is a short planning timeframe for overnight and day visits to Maine. This isn't likely to change in the short term given continued economic turbulence and fluctuations in gas prices. The short planning timeframe can create opportunities to leverage last-minute Internet deals, email marketing to regional visitors and prospects that highlights events that are coming up in the next few weeks.

# Conclusions

## *Strengths:*

- Visitors point to friends/family, shopping, beaches, beauty, and rest & relaxation as reasons for selecting Maine and the purpose of their trip. Many of these visitors see Maine as a unique place where they can unwind, escape their daily routine, and enjoy the outdoors.
- Shopping is also an important draw for visitors to the state – especially Canadians and day visitors. Canadians tend to focus their shopping on downtown areas where they can purchase less expensive goods (especially when the exchange rate is favorable as it was in 2008) while visitors from other areas focus more on outlet shopping for their deals.

# Conclusions

## *Strengths (continued):*

- Both overnight and day visitors to Maine point to a wide variety of items like the scenery, outdoor activities, shopping, and time with family and friends as the highlights of their visits. It is important to continue to leverage these items when speaking about the state as a destination. Doing so will remind past visitors about what they liked so much about the trip, which will be particularly effective given the extremely high likelihood to return and likelihood to recommend rates among visitors.

# Conclusions

## *Challenges:*

- There is currently a wide perception gap between visitors and prospects regarding Maine's strengths relative to other destinations. Maine needs to strike a difficult balance between marketing the state to cater to repeat visitors – and have high satisfaction with the state – and finding messages that attract more prospects. The challenge is to do so without alienating the core visitor and reducing return visitation rates.
- Related to the bullet above, while satisfaction among Maine visitors is high, most visitors have been to Maine before and have come to the state for years. The state needs to find ways attract more first-time visitors to ensure that visitation numbers do not contract over time.

# Conclusions

## *Challenges (continued):*

- Maine has a clear opportunity – and need – to highlight the wide range and quality of dining and lodging options in the state. The state does not fare as strongly compared to other destinations on these measures, and the quadrant analysis illustrates that these are opportunity areas that can help drive Overall Experience scores relative to other destinations. Highlighting these options will also help decrease the perception delta between visitors to the state and prospects – who are even less likely to think that Maine has enough quality dining and lodging options.
- Additionally, the quadrant analysis also shows a need to highlight the range of shopping opportunities in the state. Shopping is a positive driver of satisfaction for visitors to the state, yet fewer visitors than average selected it to describe the state.

# Appendix A: Towns/Cities Visited

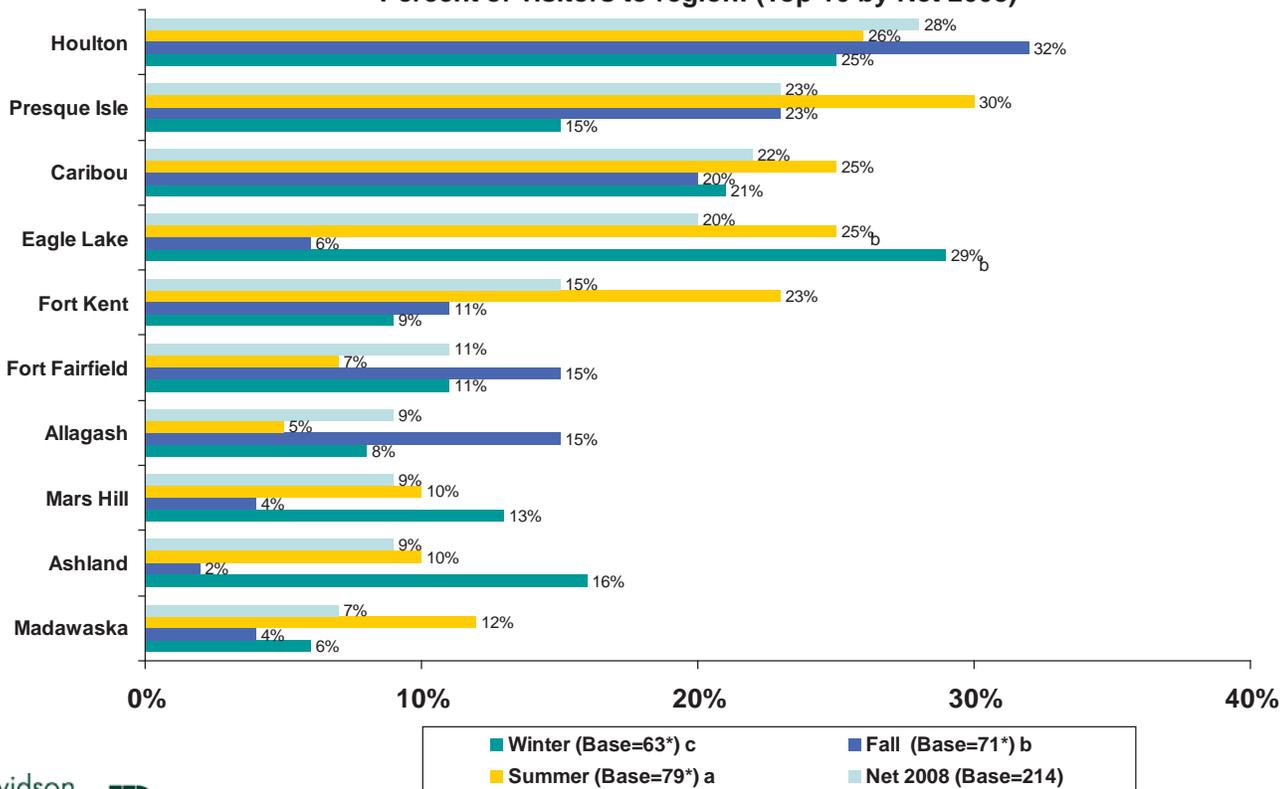


# Towns/Cities Visited: Overnight Visitors



# Towns & Cities Visited by Overnight Visitors: Aroostook County

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)

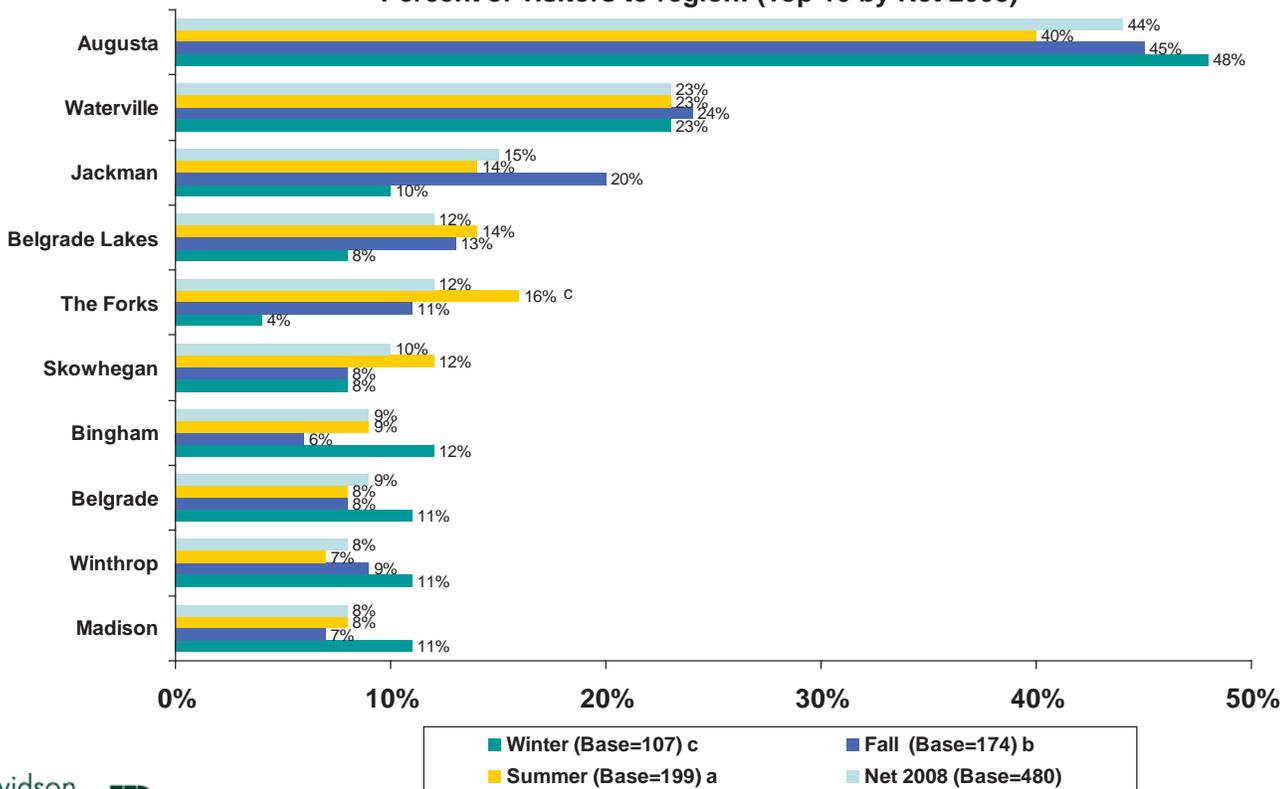


Regional Q31: Within the region you visited, what specific towns or cities did you visit?

\*Please note small sample sizes for each season. Data for these seasons should be used for directional purposes only.

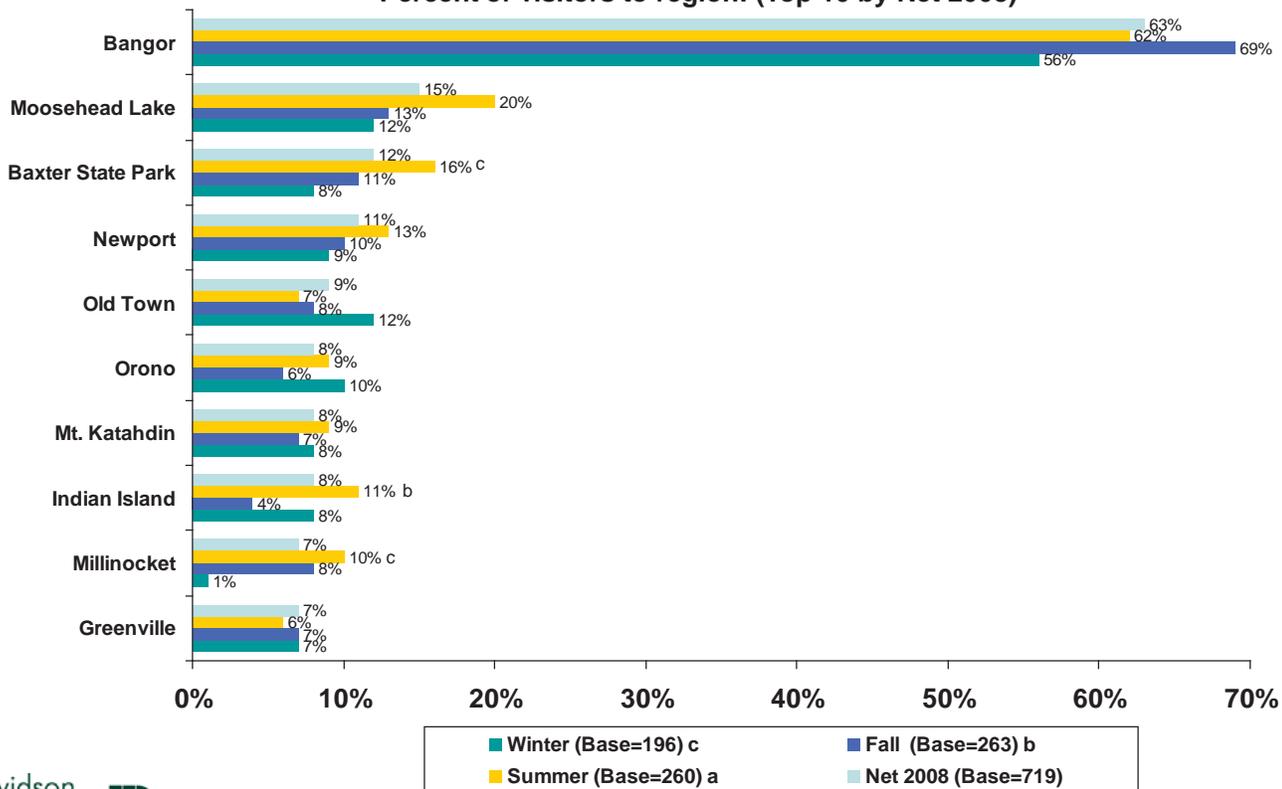
# Towns & Cities Visited by Overnight Visitors: Kennebec and Moose River Valleys

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



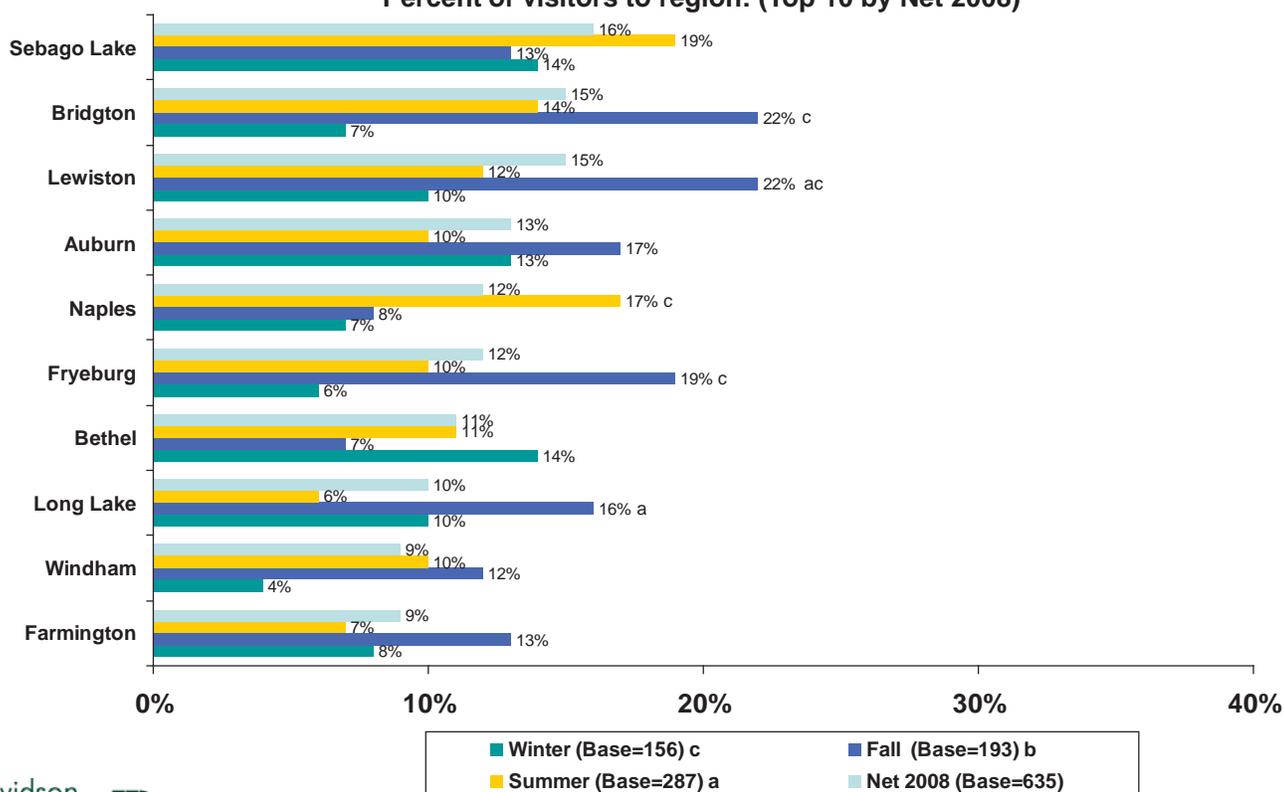
# Towns & Cities Visited by Overnight Visitors: Maine Highlands

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



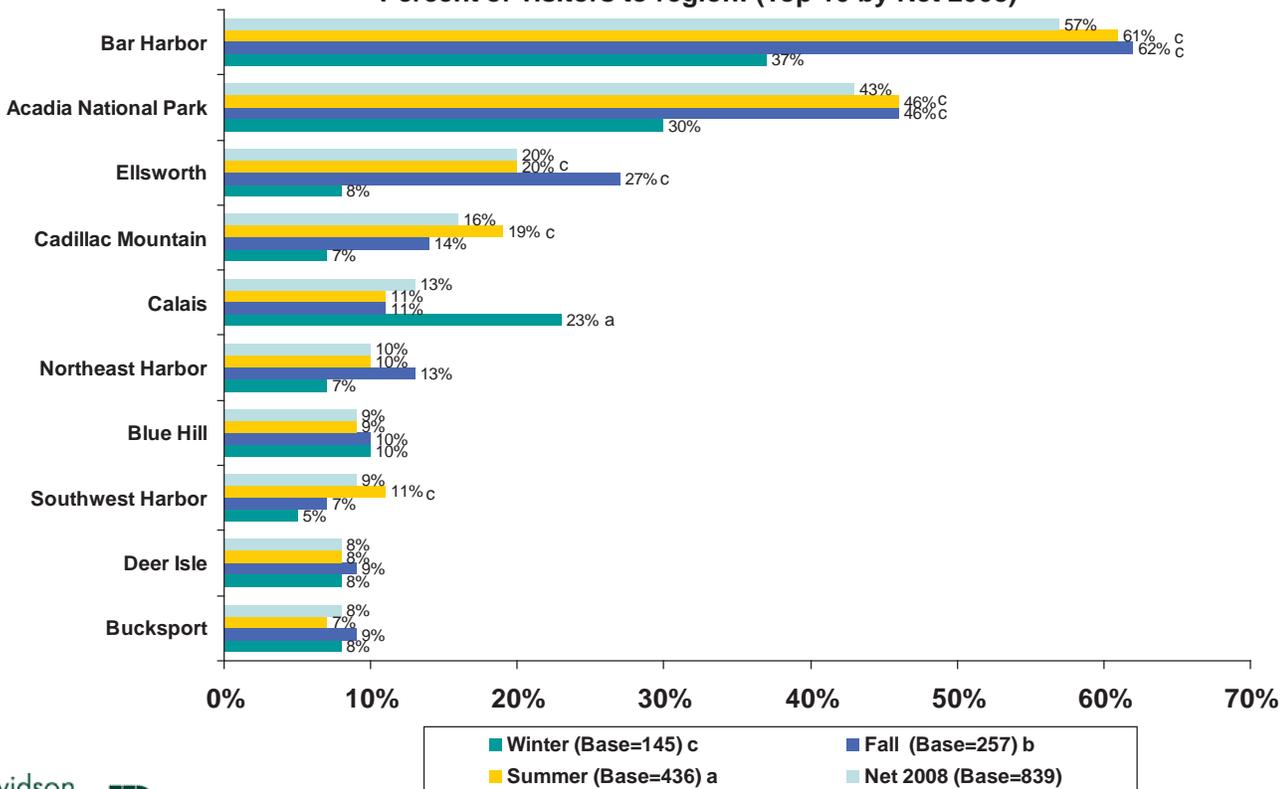
# Towns & Cities Visited by Overnight Visitors: Maine Lakes and Mountains

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



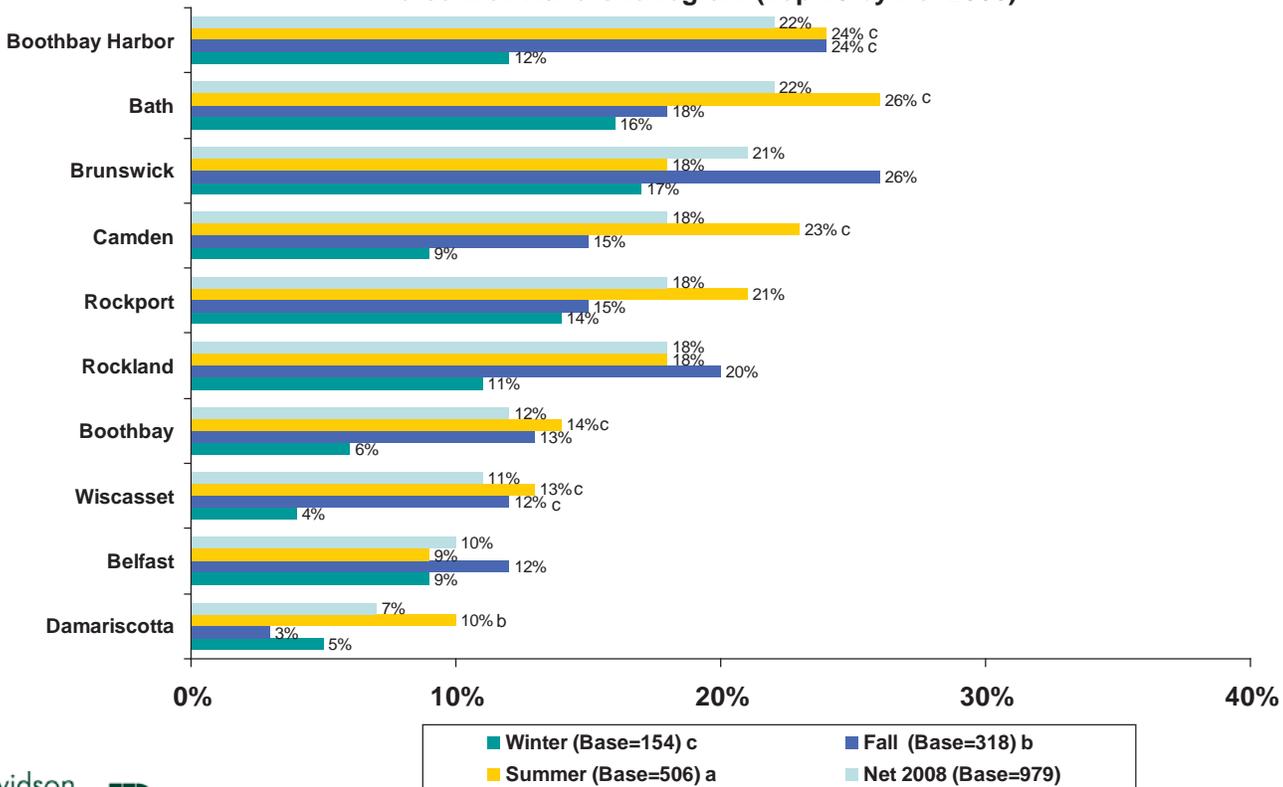
# Towns & Cities Visited by Overnight Visitors: Downeast and Acadia

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



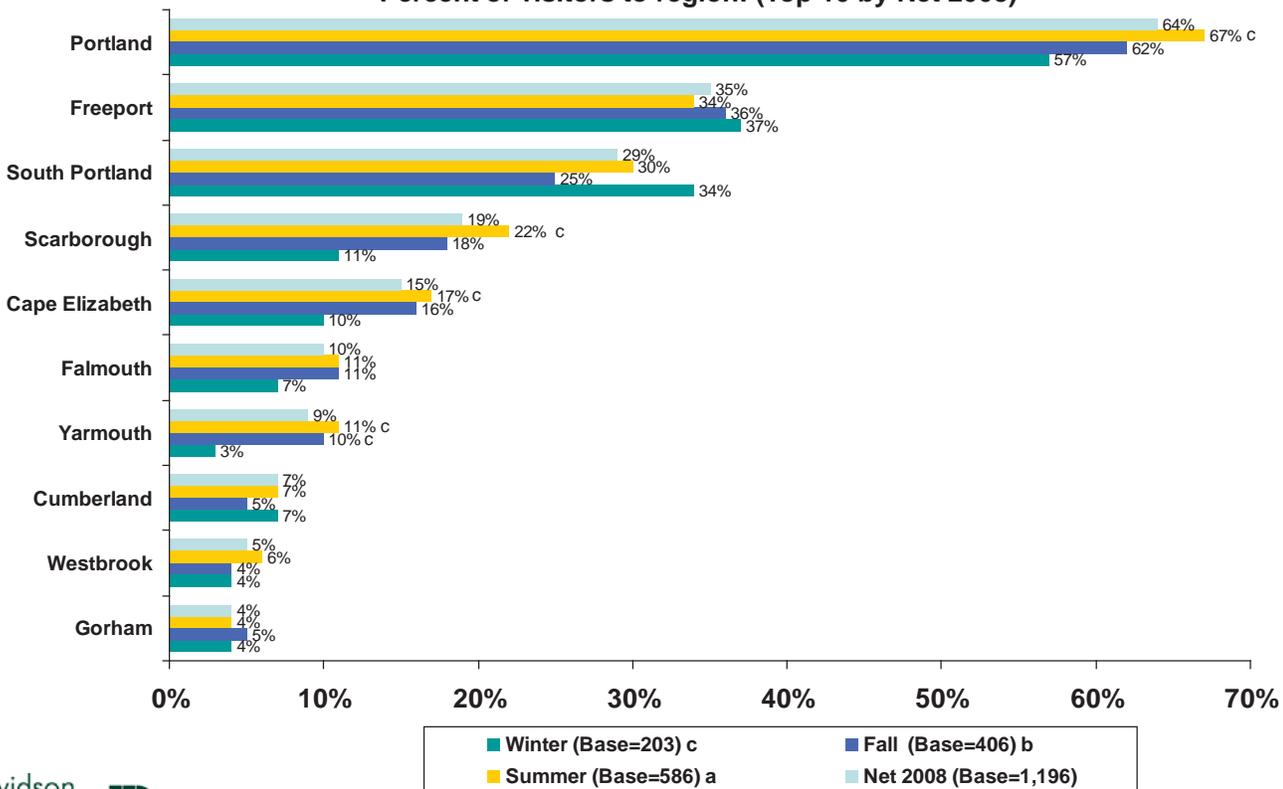
# Towns & Cities Visited by Overnight Visitors: Mid-Coast

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



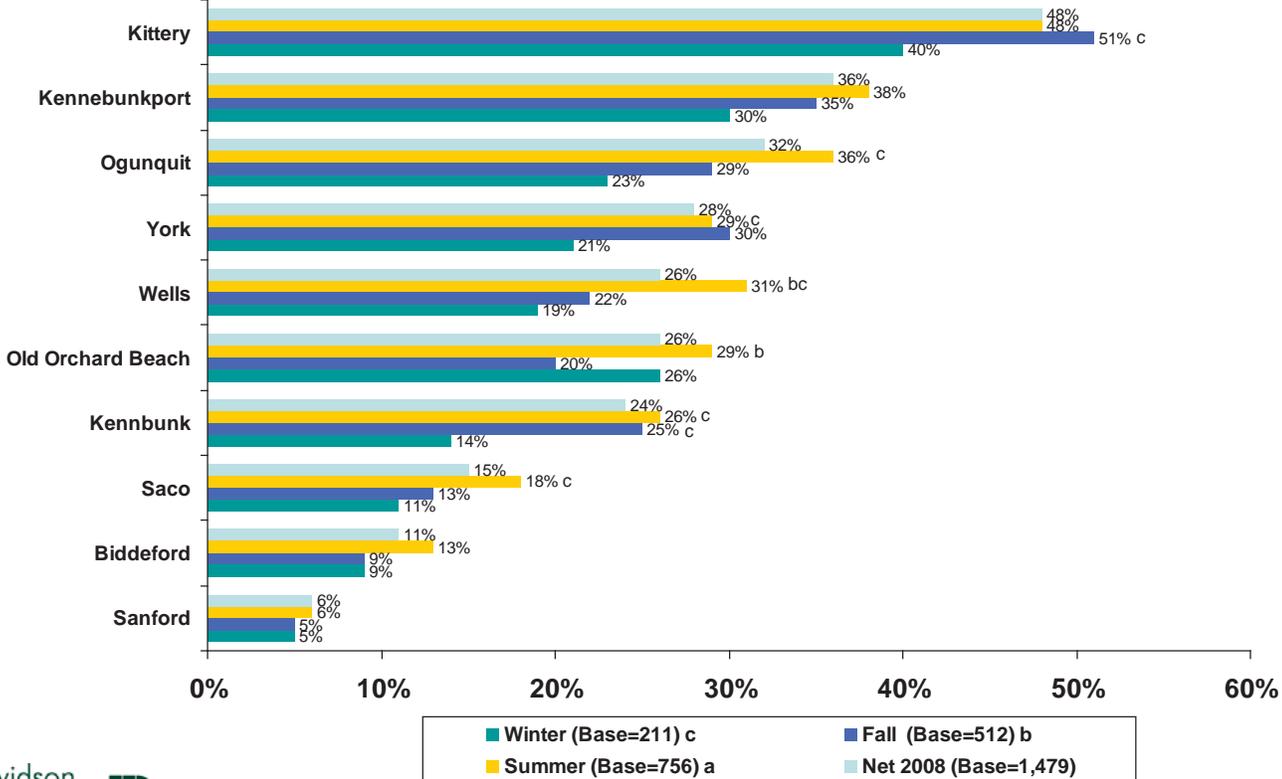
# Towns & Cities Visited by Overnight Visitors: Greater Portland

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



# Towns & Cities Visited by Overnight Visitors: Southern Maine Coast

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)

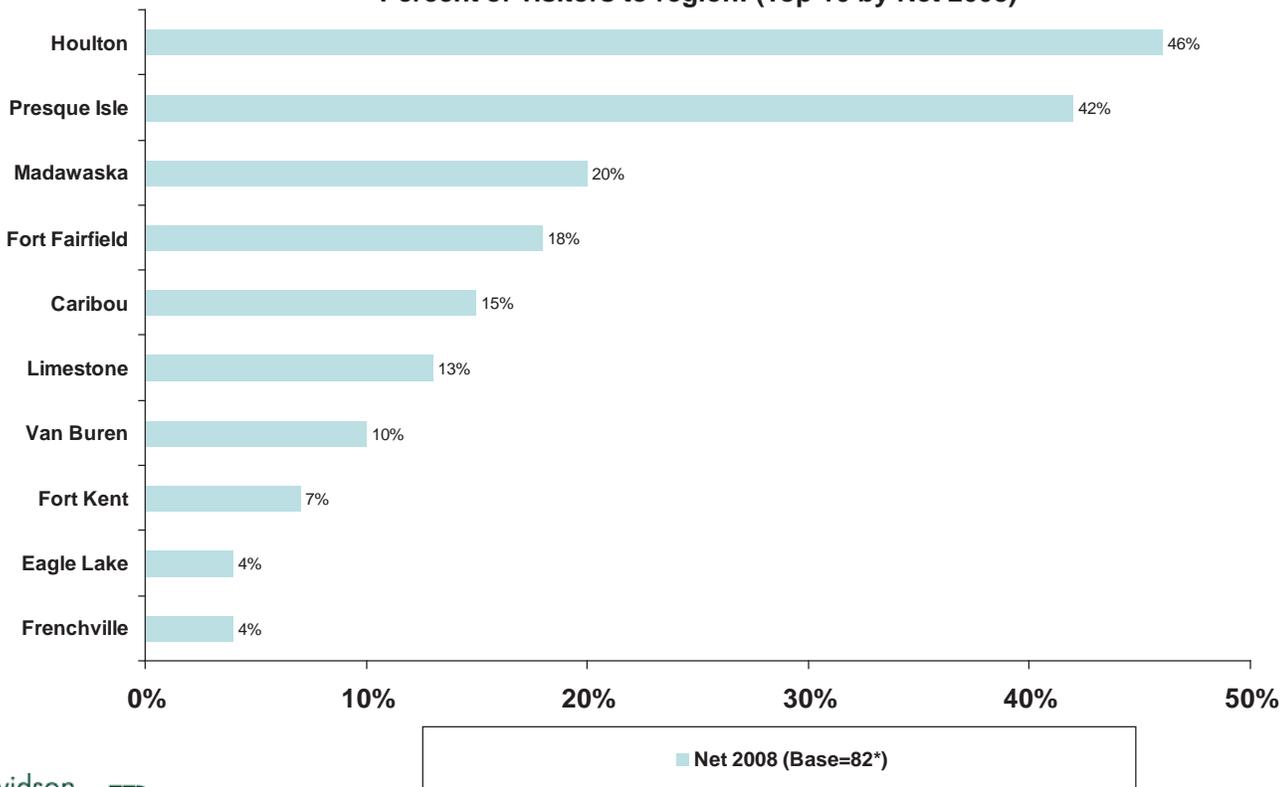


# Towns/Cities Visited: Day Visitors



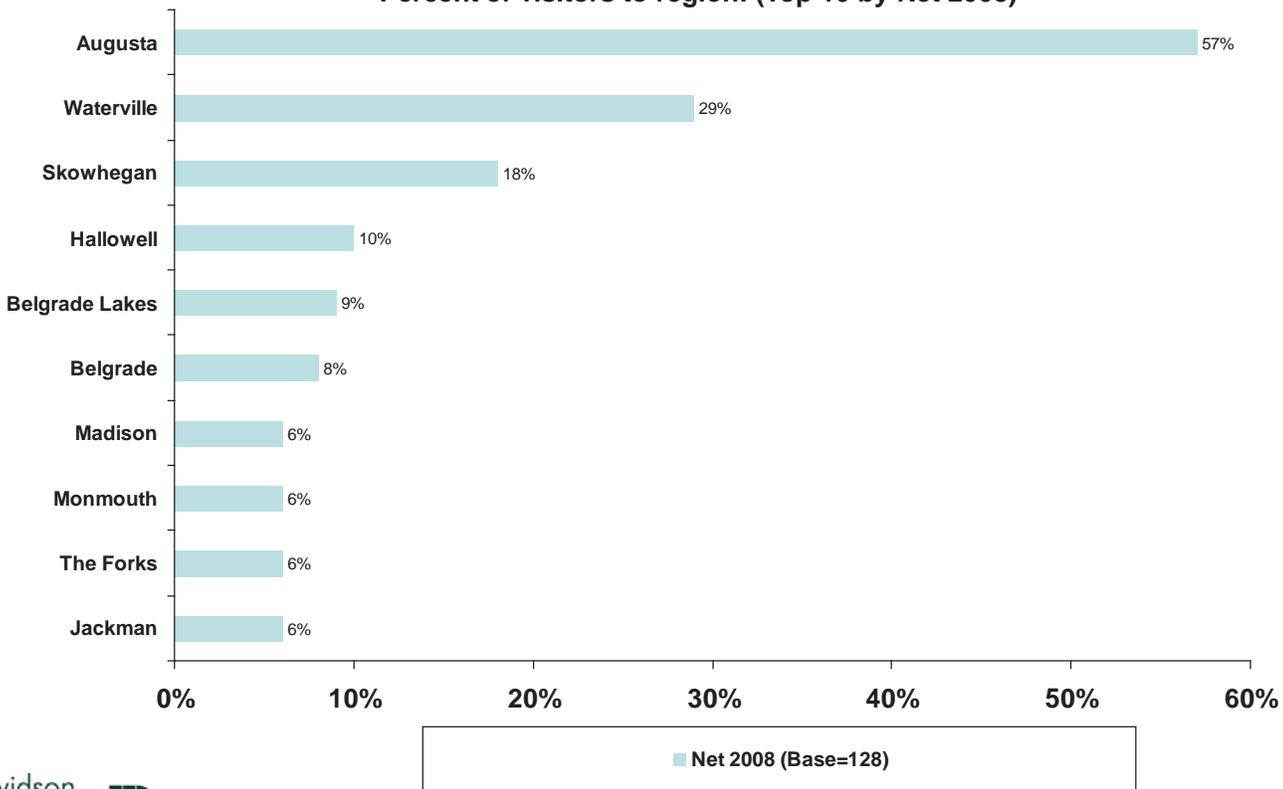
# Towns & Cities Visited by Day Visitors: Aroostook County

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



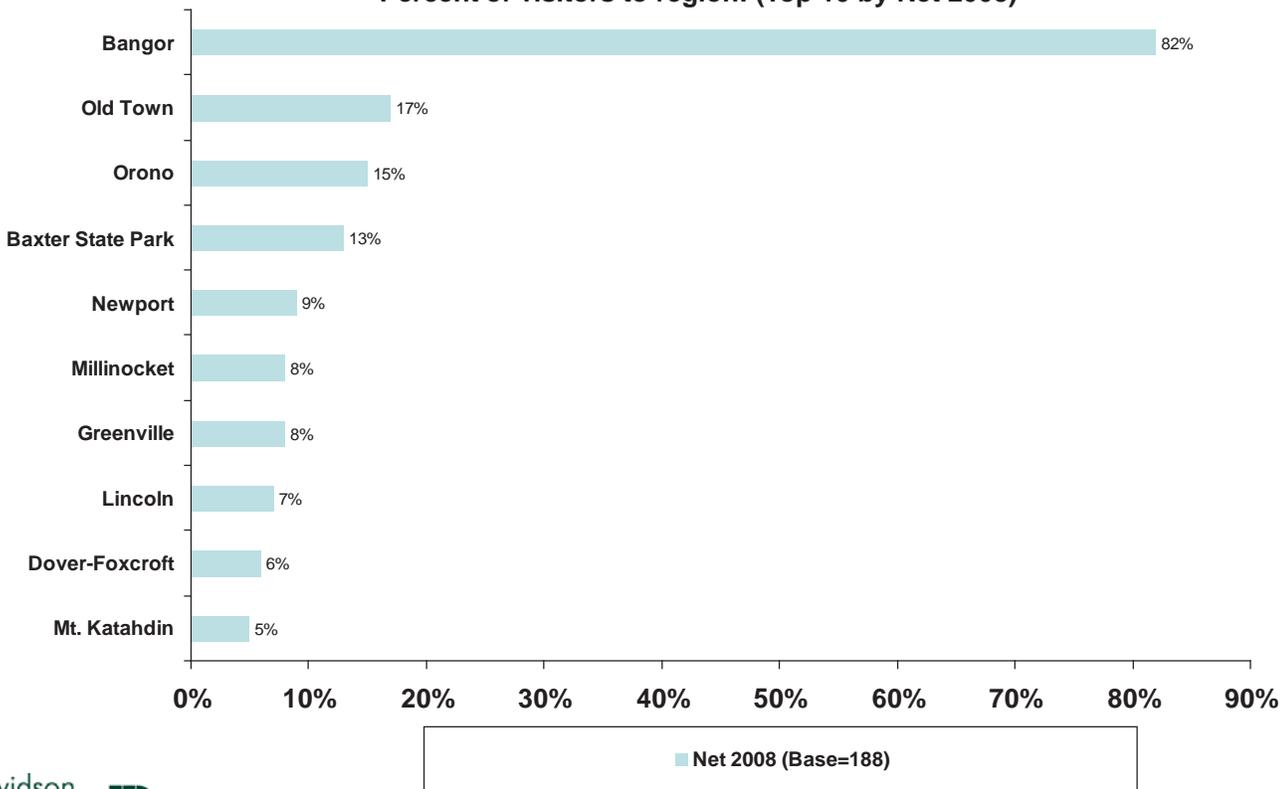
# Towns & Cities Visited by Day Visitors: Kennebec and Moose River Valleys

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



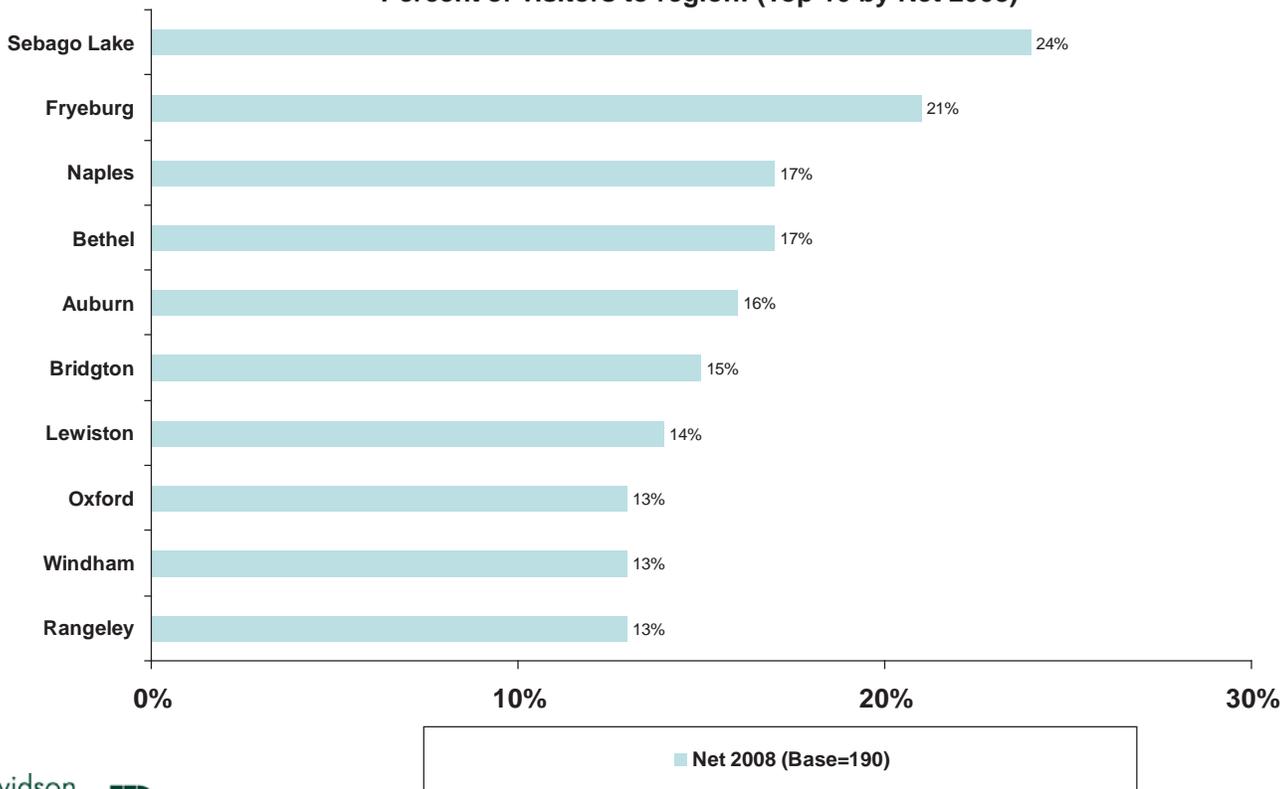
# Towns & Cities Visited by Day Visitors: Maine Highlands

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



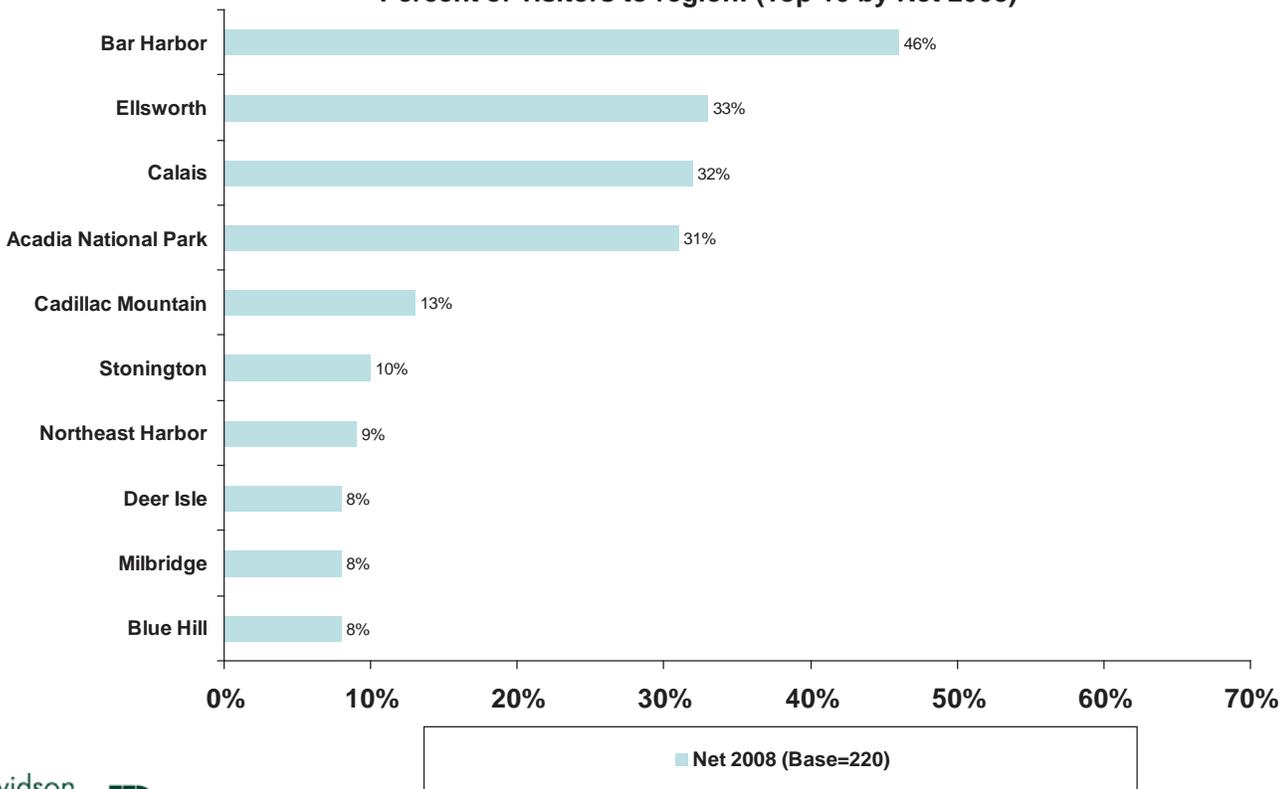
# Towns & Cities Visited by Day Visitors: Maine Lakes and Mountains

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



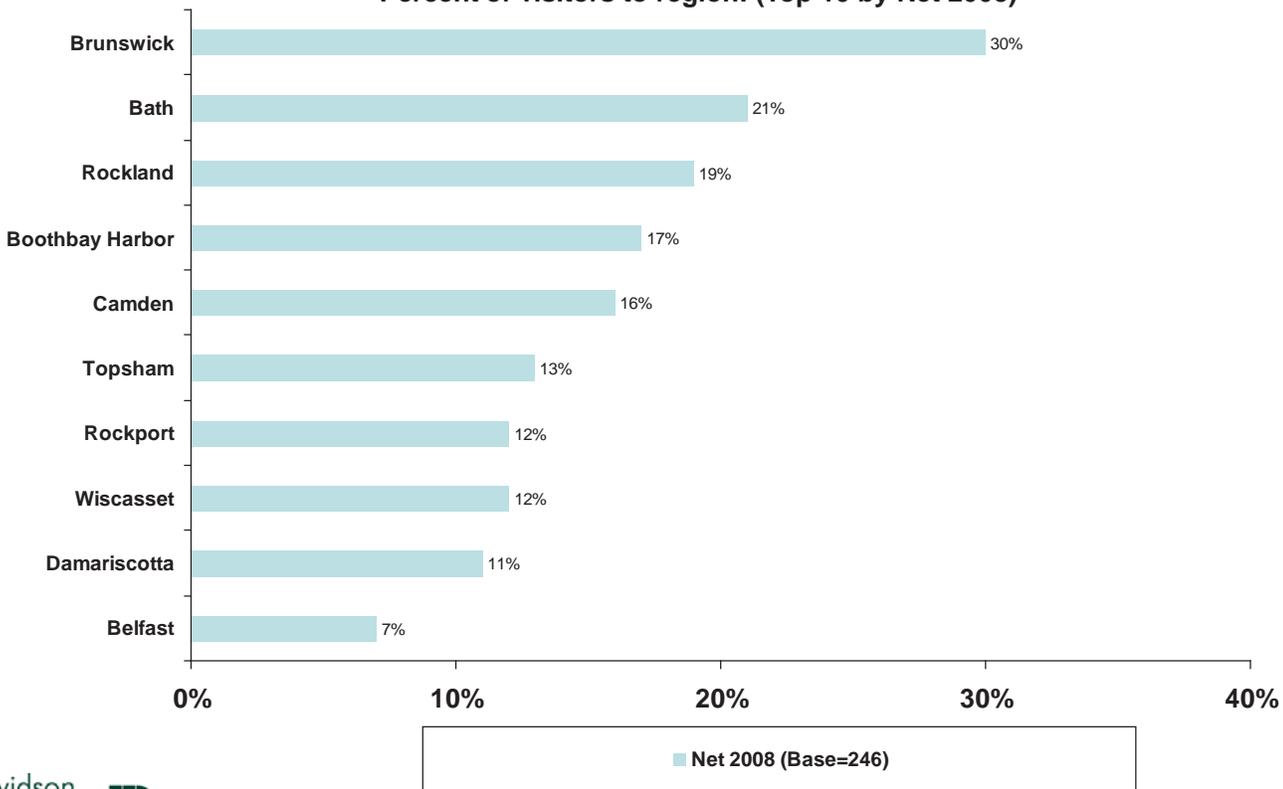
# Towns & Cities Visited by Day Visitors: Downeast and Acadia

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



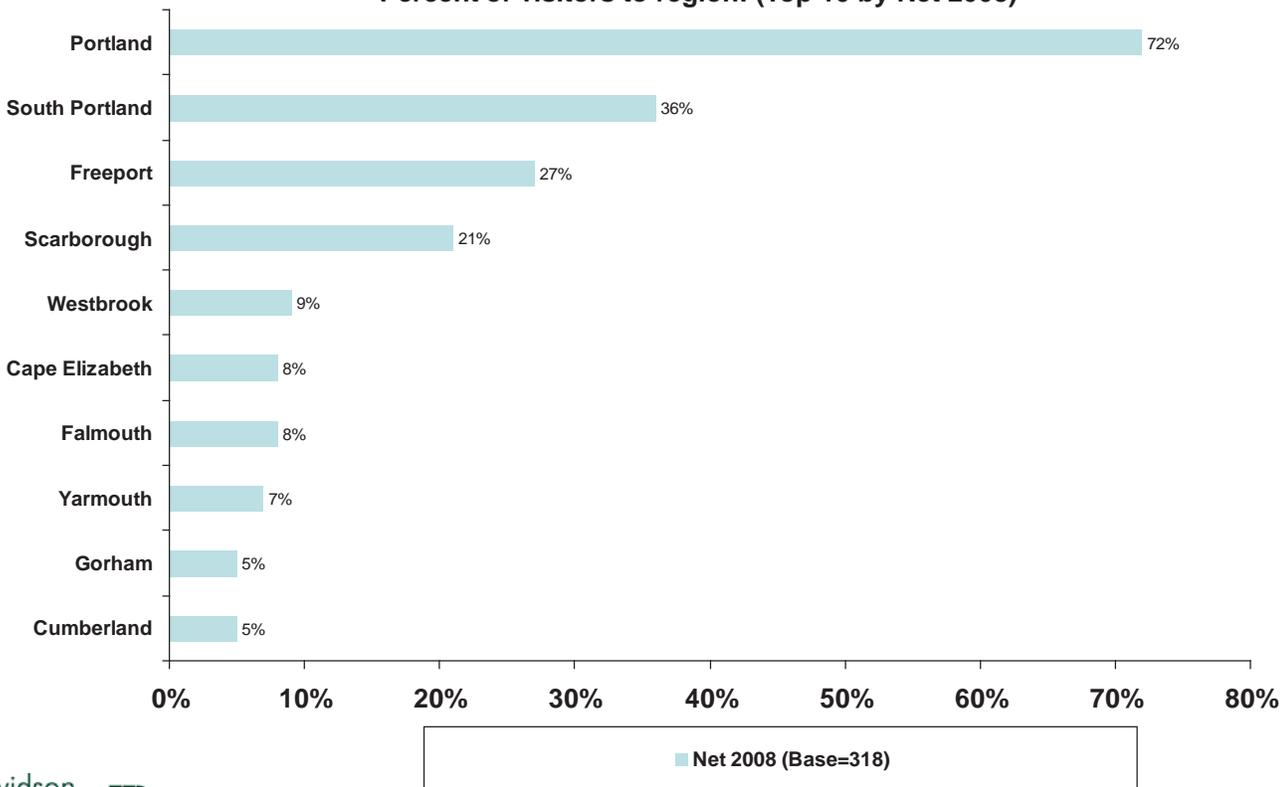
# Towns & Cities Visited by Day Visitors: Mid-Coast

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



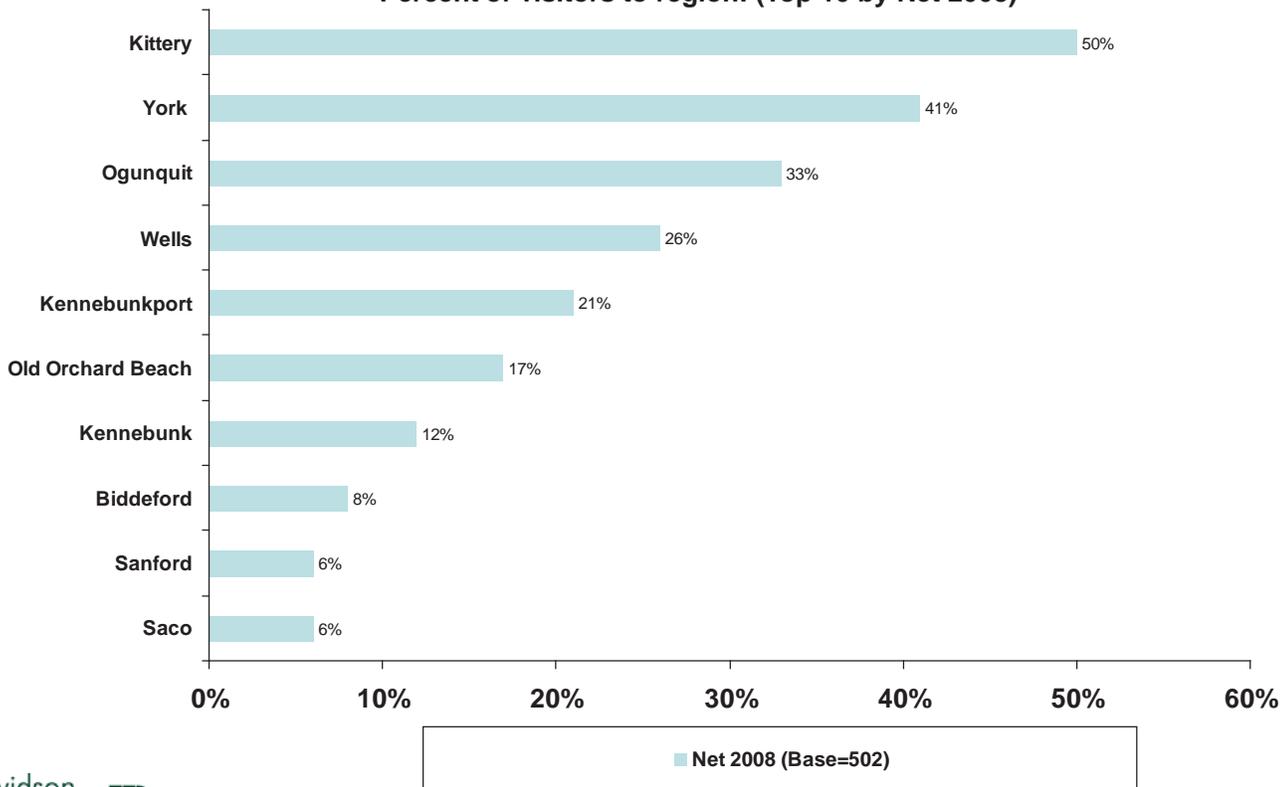
# Towns & Cities Visited by Day Visitors: Greater Portland

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



# Towns & Cities Visited by Day Visitors: Southern Maine Coast

Within the region you visited, what specific towns or cities did you visit?  
Percent of visitors to region: (Top 10 by Net 2008)



# Appendix B: Detailed Methodological Notes



# Statistics Comparison: DPA 2008 & Longwoods 2006

Metric	Longwoods 2006	DPA 2008	Notes:	DPA Implications:
<b>Overnight Visitation</b>	10,100,000	15,422,448	<ul style="list-style-type: none"> <li>•Longwoods did not include Canadian Visitors</li> <li>•Longwoods did not include children</li> </ul>	 
<b>Day Visitation</b>	31,700,000	16,528,824	<ul style="list-style-type: none"> <li>•Notes for overnight visitation apply to day trips as well.</li> <li>•Longwoods sample included all within 150 miles of Maine's borders (not including Canada). DPA sample includes all within a radius of 100 miles of Maine's borders.</li> <li>•Longwoods did not specify a minimum distance from home that was required to be considered a day trip. DPA specified that a day trip needed to be at least 50 miles away from home.</li> </ul>	  
<b>Expenditures (Net):</b>  <b>Overnight:</b> <b>Day:</b>	\$6,700,000,000  \$3,400,000,000 \$3,100,000,000	\$7,450,000,000  \$5,800,000,000 \$1,650,000,000	<ul style="list-style-type: none"> <li>•The difference in expenditures carries over from the difference in the number of day visitors estimated for the state.</li> <li>•On a per/trip level, expenditure figures are very consistent between DPA and Longwoods.</li> <li>•Relative spending by expenditure type is consistent between DPA and Longwoods.</li> </ul>	



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