Maine Office of Tourism
Visitor Tracking Research
2013 Calendar Year Annual Report

Prepared by

dpa
providing direction
in travel & tourism

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Research Objectives and Methodology

Research Objectives

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

- This research program is designed to:
  - Profile Maine visitors in demographic terms as well as in their travel patterns;
  - Explore perceptions of Maine among visitors;
  - Understand why some travelers choose to visit Maine;
  - 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.

Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the ResearchNow national online panel.

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

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

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

Methodology

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

- Data was collected between January 1st and December 15th 2013. The number of completed surveys collected for each research component are as follows:
  - Maine Overnight Visitor Survey – 2,675
  - Maine Day Visitor – 1,685
  - National Omnibus Survey – 17,591

- Throughout this report, the acronym VFR stands for "visiting friends or relatives."

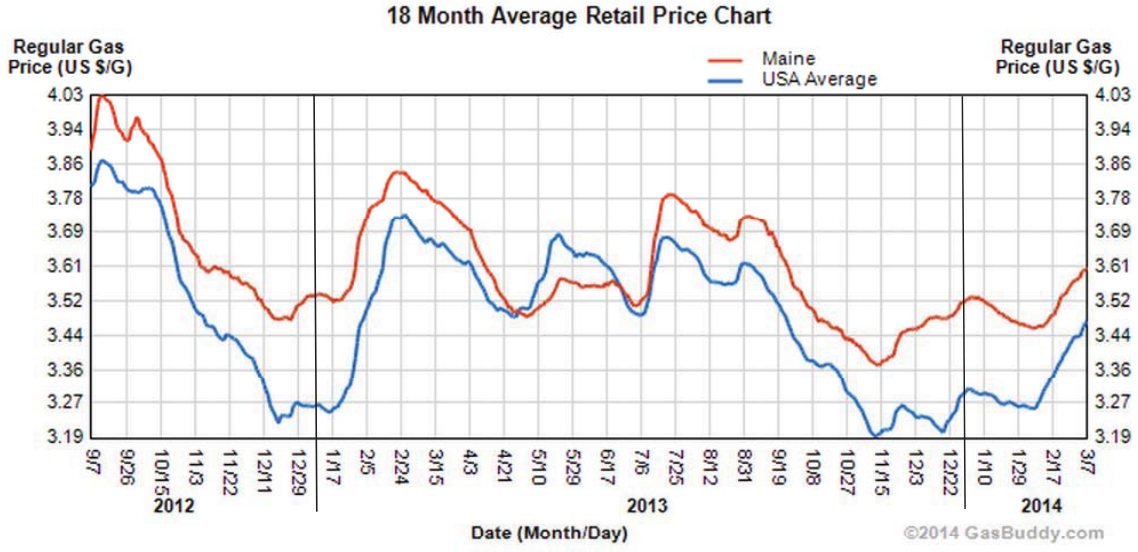
- ***Statistical significance between subgroups was calculated at the 95% confidence level and is noted throughout by <>, and/or a/b/c/etc.***

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

2013 in Context

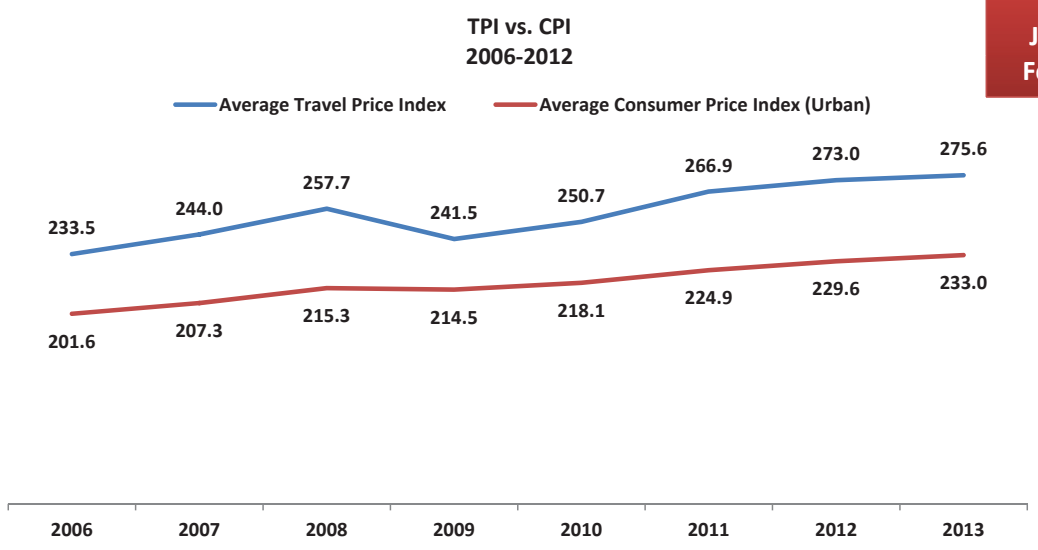
Gas prices drop from 2012 levels, though Maine prices still higher than national average for most of year.

- Dropping from 2012, Maine's gasoline prices were still higher than the national average for most of 2013. From mid-May through the end of June, however, Maine experienced lower gas prices than the national average.
- Maine gas prices peaked in February and again in July, while experiencing their lowest levels in November.



Travel Price Index* exhibits modest increase over 2012 and continues to exceed Consumer Price Index, showing a continued relatively high cost of travel.

Travel Price Index for 2014:
January – 267.6
February – 272.2



*"Developed by the U.S. Travel Association, the Travel Price Index (TPI) measures the seasonally unadjusted inflation rate of the cost of travel away from home in the United States. The TPI is based on U.S. Department of Labor price data collected for the monthly Consumer Price Index (CPI). The TPI is released monthly and is directly comparable to the CPI." - Source: U.S. Travel Association
**Note: 1982-1984 = 100

Sequester & government shutdown impact national economy and travel during the summer and fall of 2013.

- The 2013 summer travel season began with the first debt ceiling debate and a sequester that furloughed many government workers. Indirectly, this impacted Maine travel due to a slow down in the overall economy. Directly, the furlough impacted Maine by postponing the open date for Acadia National Park.

- Fall 2013 delivered a government shutdown from October 1st through October 16th, which closed the offices and suspended services of all non-essential government offices and programs, including the temporary closure of Acadia National Park. This had a widespread effect on the national economy, including travel.

Image Source: Acadia National Park courtesy of the Wikimedia Commons
Image Source: Portland International Jetport courtesy of the Wikimedia Commons

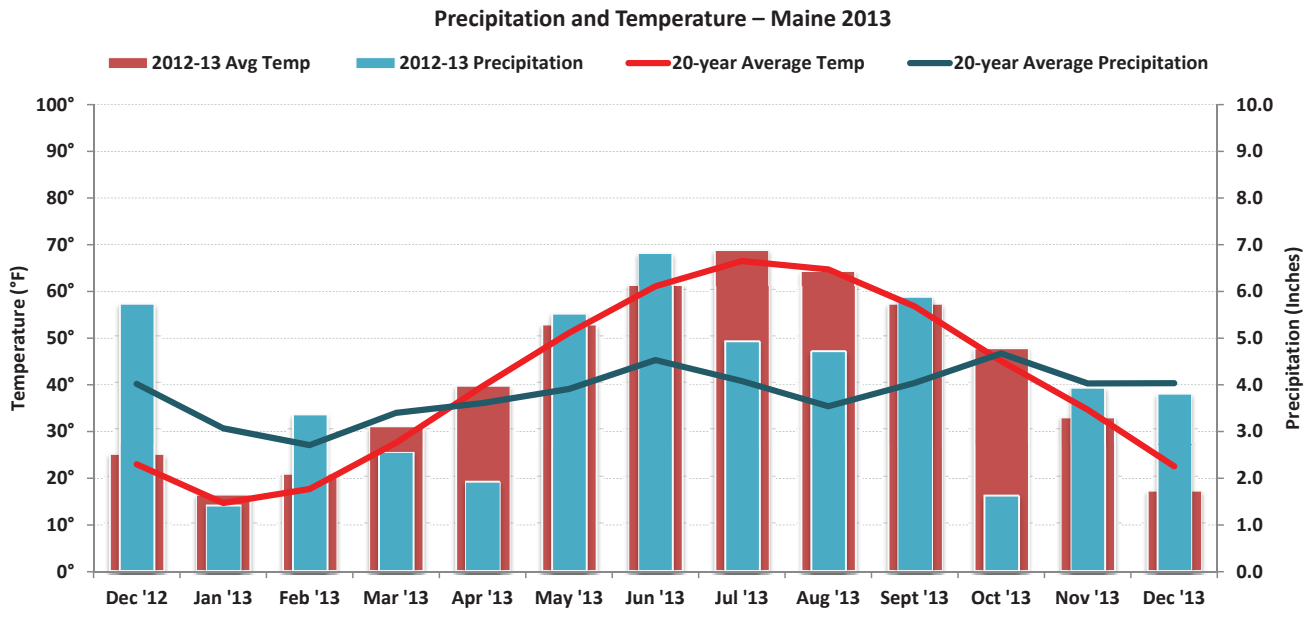
Nor'easter "Nemo" hits the Northeast in February 2013, slowing travel.

- During February 2013, nor'easter "Nemo" hit the Northeast, bringing high winds and dumping snow across the northern part of the United States and parts of eastern Canada.

Image Source: NASA courtesy of the Wikimedia Commons

Maine temperatures comparable to prior years, with higher than average precipitation during the summer travel season.

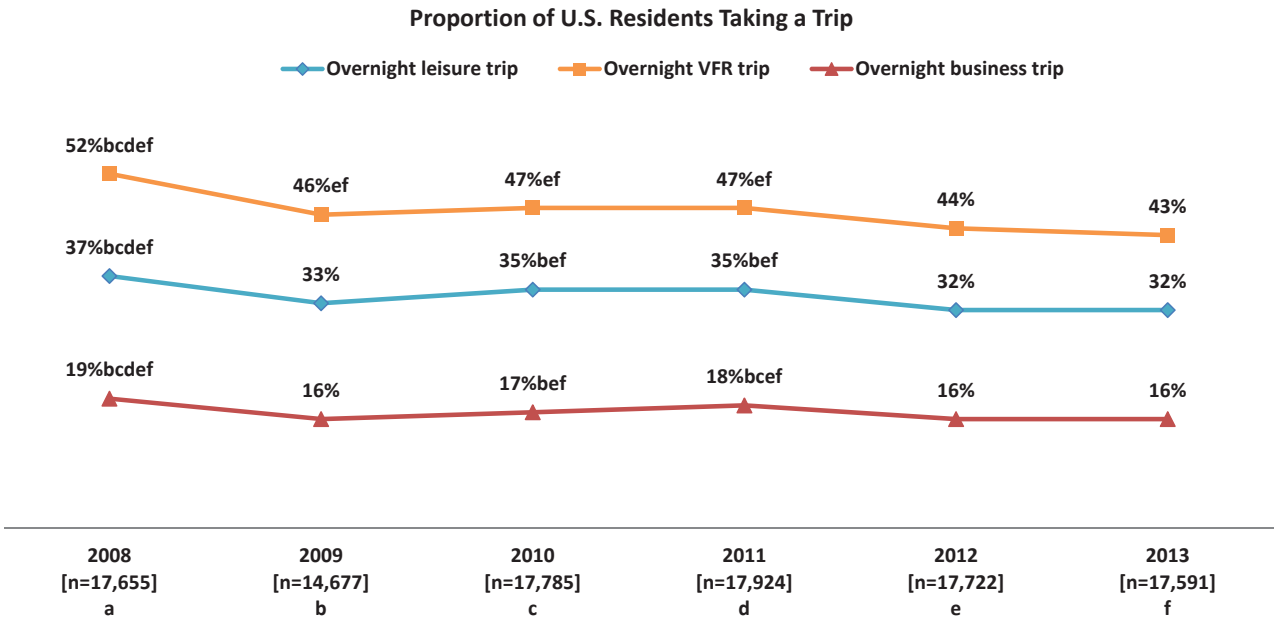
- The 2013 temperatures in Maine were comparable to the 20-year average for the State.
- Precipitation in Maine was higher than average during the summer season, and lower than average during the late winter months and early spring.



Data source: NOAA.gov

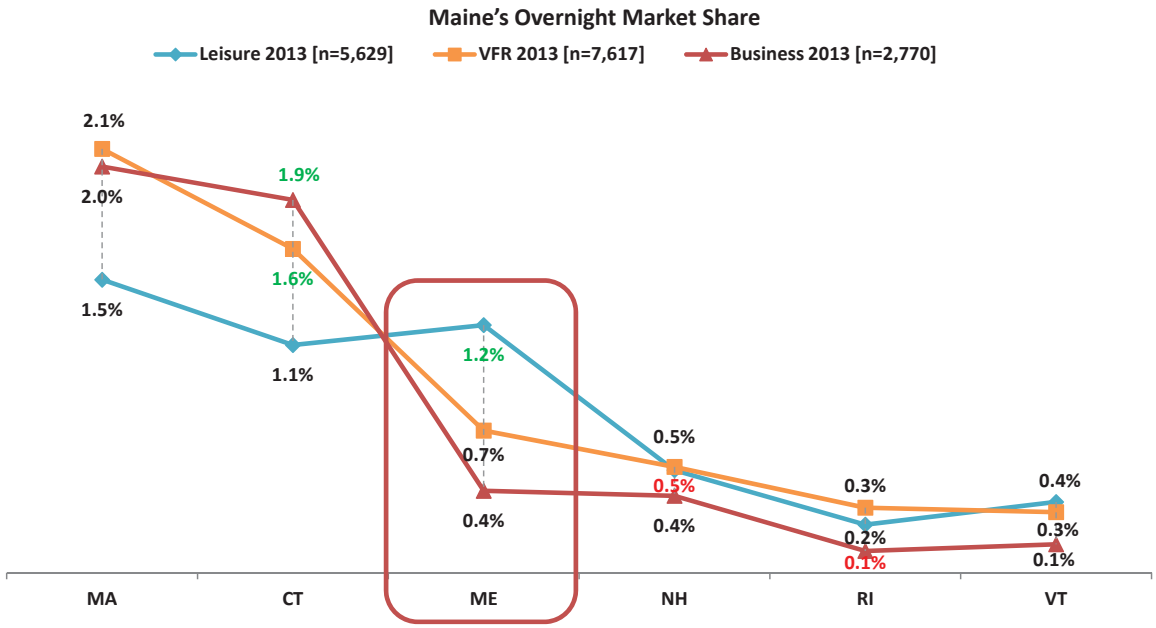
Baseline Visitor Statistics

Overnight travel among U.S. residents stable with 2012, yet still lower than levels seen in 2008-2011.



Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

Maine experiences slight increase in overnight leisure travel market share, on par with CT and lagging behind MA.



Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Estimated overnight visitation* to Maine increased nearly 5% over 2012 estimates, with the greatest year-over-year percentage increase seen during the Winter season.

Tourism-Related Overnight Visitation

	2012 Total	2013				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**15,843,035**	**16,599,691**	**10,195,297**	**5,879,314**	**525,080**	**4.8%**
Winter	2,525,782	2,838,983	1,799,203	967,350	72,430	12.4%
Summer	8,725,048	9,060,262	5,449,913	3,370,870	239,479	3.8%
Fall	4,592,205	4,700,446	2,946,181	1,541,094	213,171	2.4%
NET Trips	**6,128,547**	**6,587,319**	**3,777,737**	**2,552,183**	**257,399**	**7.5%**
Winter	1,050,436	1,199,202	705,570	456,297	37,335	14.2%
Summer	3,175,914	3,570,489	1,960,400	1,491,535	118,554	12.4%
Fall	1,902,197	1,817,628	1,111,767	604,351	101,510	-4.4%

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

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

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Growth patterns differed between resident and non-resident visitors, with a *decrease* in Maine resident overnight visitation and an *increase* in non-resident visitation.

Tourism-Related Overnight Visitation

	2012 Total	2013				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**15,843,035**	**16,599,691**	**10,195,297**	**5,879,314**	**525,080**	**4.8%**
Resident	1,204,751	1,097,571	451,056	595,036	51,478	-8.9%
Non-Resident	14,638,283	15,502,120	9,744,241	5,284,278	473,602	5.9%
NET Trips	**6,128,547**	**6,587,319**	**3,777,737**	**2,552,183**	**257,399**	**7.5%**
Resident	474,489	450,671	167,133	258,303	25,235	-5.0%
Non-Resident	5,654,058	6,136,648	3,610,604	2,293,881	232,164	8.5%

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Estimated day visitation* to Maine increased more than 14% over 2012 estimates, with the greatest year-over-year percentage increase seen during the Winter and Summer seasons.

Tourism-Related Day Visitation

	2012 Total	2013				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**16,779,562**	**19,196,009**	**12,101,829**	**5,950,384**	**1,143,796**	**14.4%**
Winter	1,979,971	2,312,087	1,419,092	718,156	174,839	16.8%
Summer	11,422,366	13,536,709	8,672,794	4,086,224	777,691	18.5%
Fall	3,377,225	3,347,213	2,009,943	1,146,004	191,266	-0.9%
NET Trips	**6,732,433**	**7,608,470**	**4,702,658**	**2,360,428**	**545,385**	**13.0%**
Winter	874,520	959,690	593,762	289,579	76,349	9.7%
Summer	4,517,734	5,271,419	3,285,149	1,608,750	377,521	16.7%
Fall	1,340,180	1,377,361	823,747	462,099	91,515	2.8%

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

- *All leisure trips.*
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- *Business trips that are for a convention/conference/trade show or training/professional development.*

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Unlike overnight visitation estimates, resident day visitation in 2013 showed a large percentage increase over 2012 estimates.

Tourism-Related Day Visitation

	2012 Total	2013				Y/Y % Difference
		Total	Leisure	VFR	Business	
NET Visitors	**16,779,562**	**19,196,009**	**12,101,829**	**5,950,384**	**1,143,796**	**14.4%**
Resident	4,922,451	5,986,552	3,088,876	2,194,718	702,958	21.6%
Non-Resident	11,857,112	13,209,457	9,012,953	3,755,667	440,838	11.4%
NET Trips	**6,732,433**	**7,608,470**	**4,702,658**	**2,360,428**	**545,385**	**13.0%**
Resident	2,027,872	2,406,104	1,200,309	870,612	335,184	18.7%
Non-Resident	4,704,561	5,202,366	3,502,349	1,489,817	210,200	10.6%

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

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

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Visitors spent an estimated $5.2 billion in Maine during 2013, a 6.5% increase over 2012 spending estimates.

- Retail sales, lodging, and food expenditures comprised the highest proportions of visitor spending.
- Lodging expenditures and transportation expenditures (other than gas) showed the largest year-over-year percentage increases from 2012 to 2013.

Direct Tourism Expenditures Tourism Related Trips*	Total 2012	Total 2013	Winter/Spring 2013	Summer 2013	Fall 2013	Y/Y % Difference
NET Spending	$4,914,488,943	$ 5,233,137,187	$793,336,482	$3,265,972,538	$1,173,828,167	6.5%
Retail Sales	$1,428,207,407	$1,477,723,792	$224,020,918	$922,239,405	$331,463,470	3.5%
Lodging	$ 1,271,033,750	$1,441,972,510	$218,601,072	$899,927,223	$323,444,215	13.4%
Restaurant/Food	$1,332,158,202	$1,391,625,467	$210,968,529	$868,505,907	$312,151,032	4.5%
Gasoline	$ 503,795,830	$511,313,008	$77,514,357	$319,107,675	$114,690,976	1.5%
Recreation	$340,460,298	$365,895,064	$55,469,1940	$228,353,125	$82,072,745	7.5%
Transportation	$38,833,456	$ 44,607,346	$6,762,413	$27,839,203	$10,005,730	14.9%

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

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

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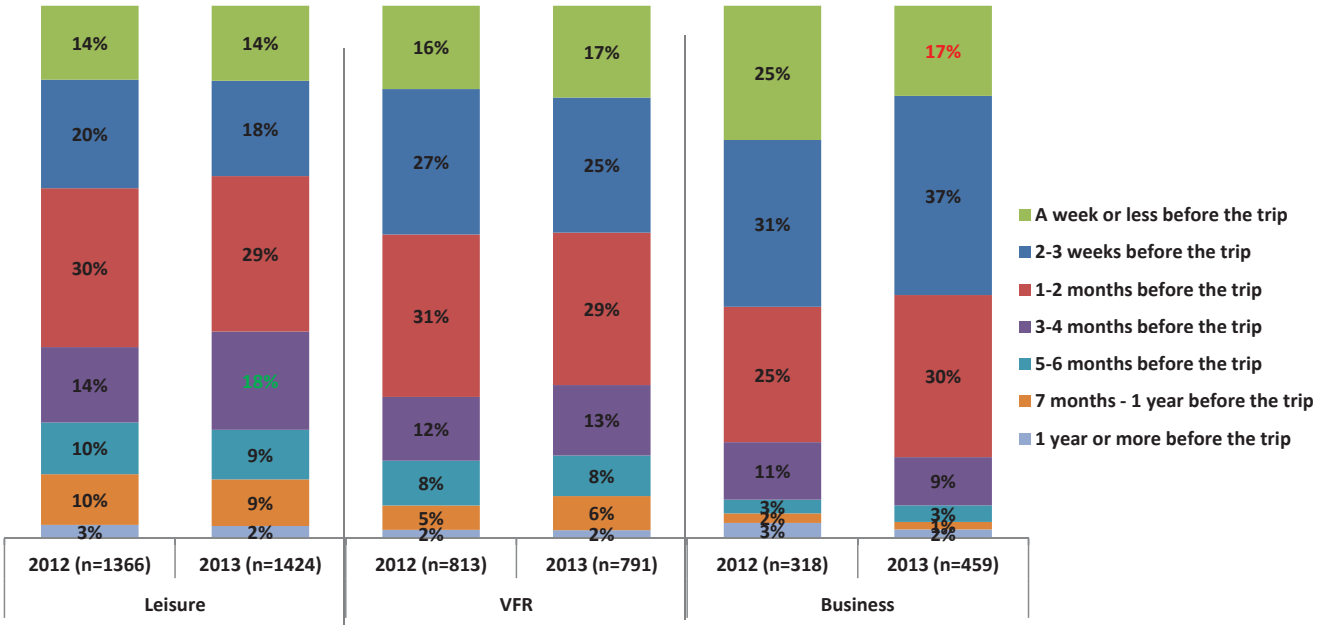
Maine Overnight Trip Planning

The majority of Maine overnight visitors started thinking about their trips to ME less than two months before traveling.

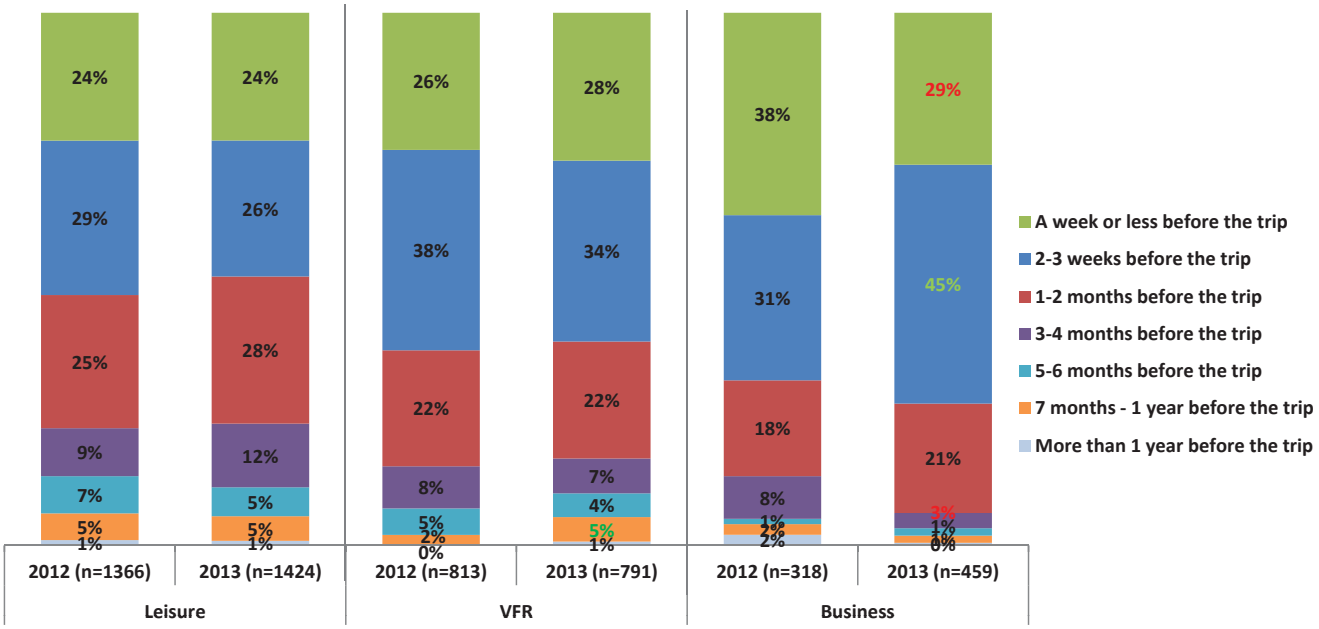
- Business travelers had the shortest trip planning timeframe, followed by those visiting friends and relative and then leisure travelers.



Regional Q12. When you were planning this overnight trip to Maine, when did you first start thinking about it?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

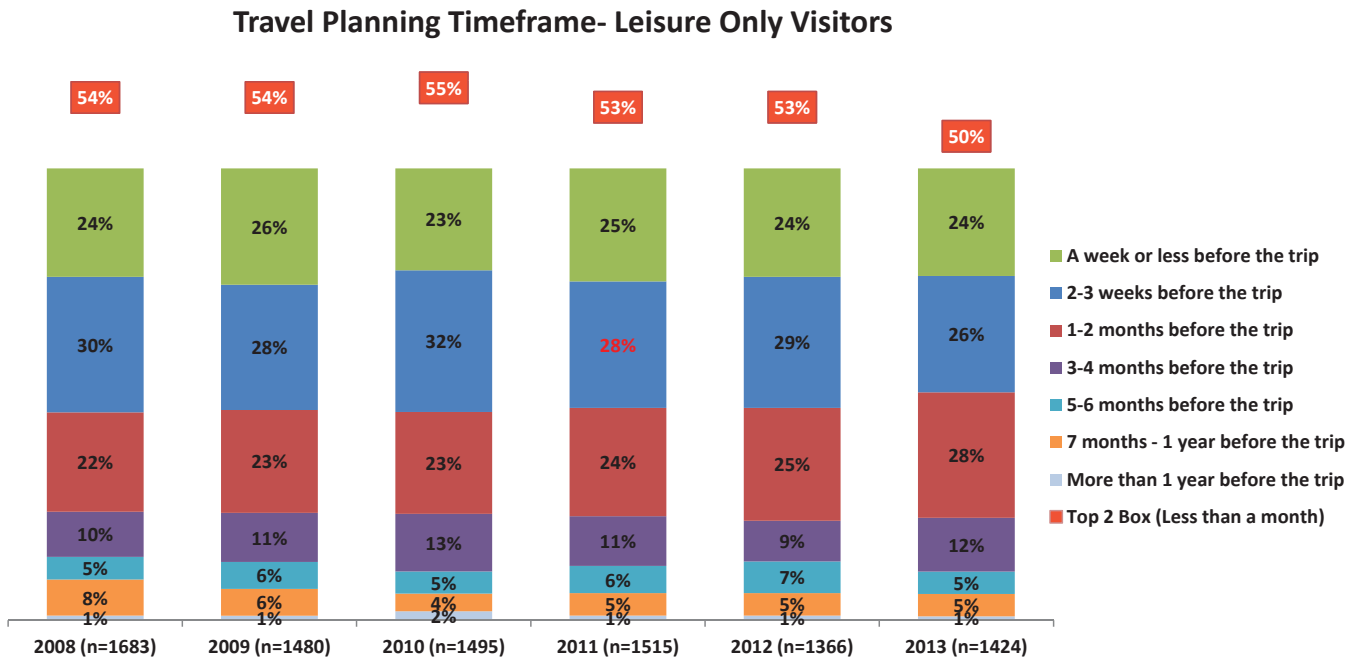
The vast majority of Maine's overnight visitors made their final decision to come to Maine within two months of traveling.

- Again, business travelers had the shortest decision making timeframe, with 95% of them taking this trip to Maine within two months of having decided to do so. Three-fourths of business travelers headed to Maine within three weeks of making the decision to travel.



Regional Q13. When did you finally decide to take this specific trip to Maine?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The leisure travel planning timeframe has remained relatively unchanged since 2008.



Regional Q13. When did you finally decide to take this specific trip to Maine?
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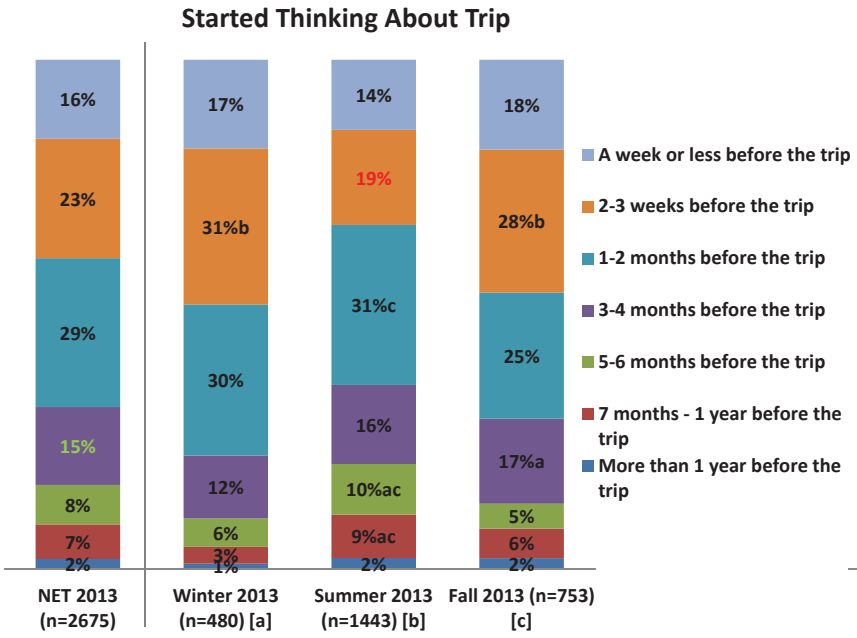
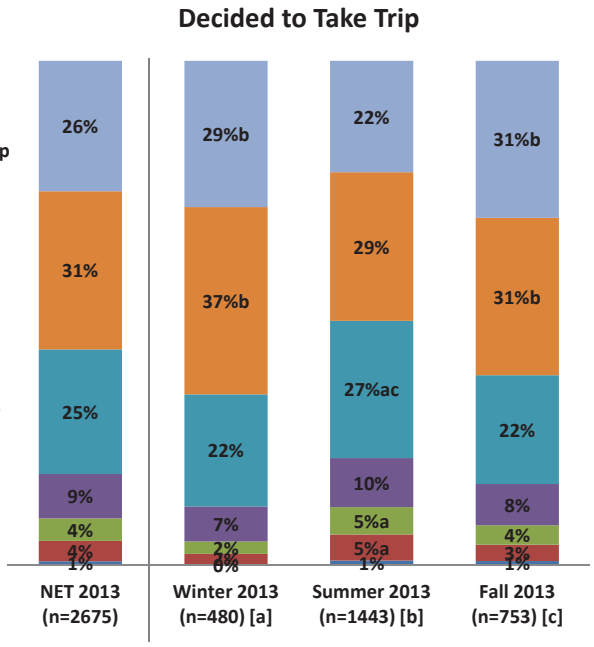
Summer travelers continue to exhibit the longest travel planning horizon.





Regional Q12. When you were planning this most recent overnight trip in Maine, when did you first start thinking about it?
Regional Q13. When did you finally decide to take this specific trip in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The Internet and the advice of family/friends remain the most widely used trip planning resources for travelers planning an overnight trip to Maine.

- The proportion of travelers relying on *social media* to help them plan their trip has increased from 2012 to 2013 (8% to 10%).
- The type of trip these travelers are taking impacts the sources they consult for planning, with leisure and business travelers being more likely to consult the Internet or local Chambers of Commerce.

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]	Winter (n=480) [d]	Summer (n=1443) [e]	Fall (n=753) [f]
Any (NET)	98%	99%	97%	99%	98%	98%	98%
The Internet	64%	71%bc	52%	62%b	64%	67%f	59%
Friends/relatives/co-workers' advice	34%	30%c	50%ac	21%	34%	35%	33%
AAA	16%	17%b	13%	17%	19%f	16%	13%
Travel guides/brochures	12%	14%b	9%	12%	12%	13%	11%
Social Media	10%	10%	11%	9%	7%	11%d	10%
Travel Books	9%	10%b	7%	9%	8%	11%f	6%
Travel magazines	9%	9%	7%	12%b	8%	11%f	6%
Articles or travelogues	7%	8%	7%	7%	7%	8%f	6%
Contact local convention and visitors bureaus	6%	7%b	4%	7%	7%	5%	6%
Contact local Chambers of Commerce	5%	5%b	3%	6%b	5%	5%	4%
Travel agent	4%	3%	2%	9%ab	4%	3%	5%
Other	9%	7%	11%a	8%	8%	8%	10%

Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Visitors from outside of New England are more likely to consult a number of sources when planning their trip.

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

	NET 2013 (n=2675)	Residence			Repeat Visitation	
		New England (n=769) [a]	Other US (n=1018) [b]	Canada (n=717) [c]	First Time (n=370) [d]	Repeat (n=2305) [e]
Any (NET)	98%	97%	99%a	99%a	99%	98%
The Internet	64%	57%	69%a	68%a	67%	63%
Friends/relatives/co-workers' advice	34%	42%c	38%c	18%	34%	34%
AAA	16%	15%	18%	15%	18%	15%
Travel guides/brochures	12%	8%	17%ac	12%a	19%e	11%
Social Media	10%	9%	13%ac	8%	20%e	9%
Travel Books	9%	5%	15%ac	8%a	17%e	8%
Travel magazines	9%	5%	14%ac	8%a	16%e	8%
Articles or travelogues	7%	4%	10%a	8%a	13%e	6%
Contact local convention and visitors bureaus	6%	2%	7%a	9%a	10%e	5%
Contact local Chambers of Commerce	5%	3%	5%a	6%a	10%e	4%
Travel agent	4%	2%	5%a	6%a	7%	3%
Other	9%	13%bc	6%	5%	2%	10%d

Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The overall resources being used to plan overnight trips haven't changed significantly between 2008 and 2013.

- A slight downward trend in usage of *travel books* and the *advice of friends/relatives/co-workers* can be seen.

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

Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?
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VisitMaine.com remains among the top 3 online trip planning resources utilized by overnight visitors.

- Year-over-year increases were seen in the proportion of overnight visitors consulting TripAdvisor, airline websites, and YouTube.
- Travelers visiting Maine during the Fall season are the least likely to use any of the listed websites to plan their trip to Maine.

	NET 2013 (n=1787)	Leisure (n=1046) [a]	VFR (n=442) [b]	Business (n=299) [c]	Winter (n=316) [d]	Summer (n=1003) [e]	Fall (n=467) [f]
Any (NET)	94%	94%	92%	95%	95%f	95%f	90%
Google maps	33%	35%b	29%	32%	34%	34%	31%
TripAdvisor	33%	37%bc	29%	26%	32%	36%f	28%
VisitMaine.com	**28%**	**32%bc**	**22%**	**22%**	**24%**	**30%d**	**25%**
Online search engines (Google, Yahoo, etc.)	25%	27%	23%	22%	28%	25%	24%
Maine Tourism Region Websites (NET)	**24%**	**25%**	**24%**	**22%**	**22%**	**25%**	**24%**
Accommodation web sites	17%	22%bc	9%	14%	16%	17%	19%
AAA	17%	16%	18%	21%	22%f	17%	14%
Mainetourism.com	17%	19%	15%	16%	16%	18%	16%
Booking web sites (Expedia, Orbitz, etc.)	16%	16%	16%	14%	19%f	16%f	12%
Google+	13%	8%	16%a	22%a	16%	12%	11%
Facebook	12%	9%	19%a	13%	13%	11%	14%
Chambers of Commerce web sites	8%	9%b	5%	10%b	8%	9%	8%
Airline web sites	7%	4%	8%a	15%ab	8%f	8%f	3%
Travel blogs	7%	7%	7%	6%	6%	7%	6%
YouTube	6%	5%	7%	11%a	5%	7%	7%
Zagat.com	5%	4%	8%c	6%	5%	6%	4%
DiscoverNewEngland.org	5%	5%c	7%c	2%	5%	6%	4%
Other Maine travel web sites (Please specify)	1%	1%	1%	1%	1%	1%	1%
Other (Please specify)	8%	9%	7%	6%	6%	8%	8%
Did not use any of the above	6%	6%	8%	5%	5%	5%	10%ab

Regional Q18. Which of the following web sites did you visit when planning this trip in Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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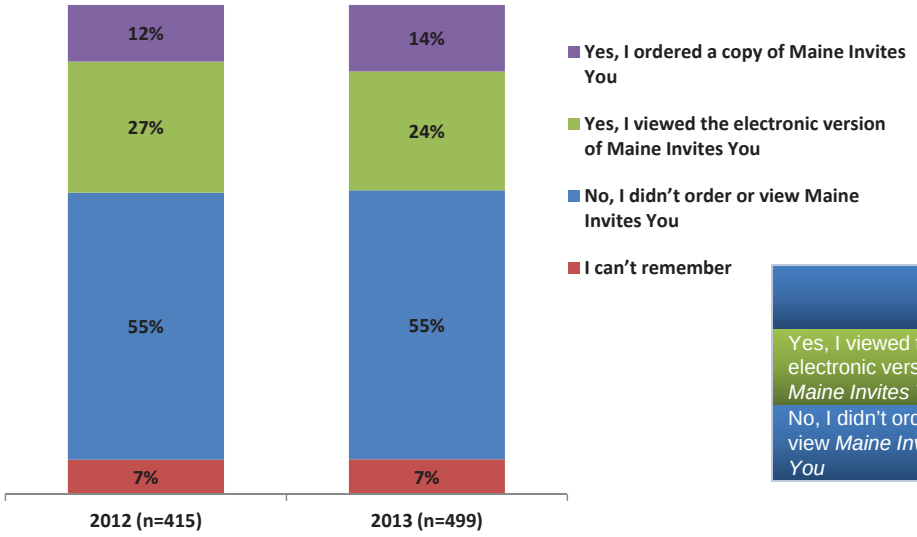
A strong minority of those viewing the VisitMaine.com website either ordered or viewed "Maine Invites You."

- Business travelers were most likely to order a copy of *Maine Invites You* (27% versus 11% of leisure travelers and 12% of VFR travelers).
- Canadian visitors are more likely than domestic visitors to have viewed the electronic version of this publication (35% versus 20%), while US visitors are more likely to have not ordered or viewed this publication (60% versus 44% of Canadians).

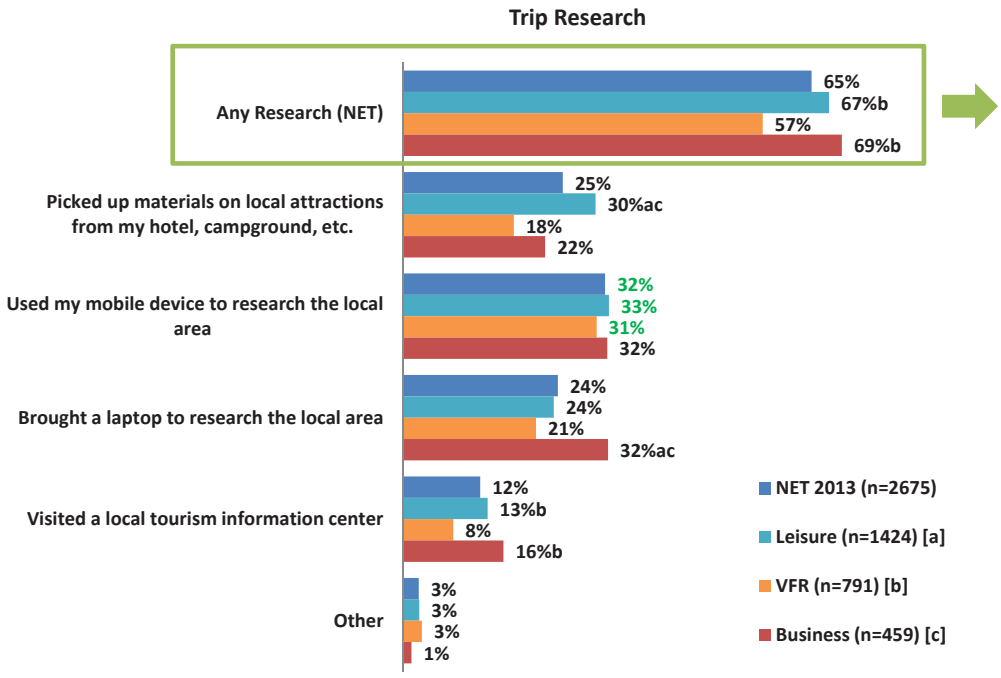


	US Total (n=351)	Canada (n=148)
Yes, I viewed the electronic version of *Maine Invites You*	20%	<35%>
No, I didn't order or view *Maine Invites You*	<60%>	44%

Regional Q23. While on the VisitMaine.com website, did you order a copy of or view the electronic version of the Maine Invites You travel planner?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Most travelers continue to research Maine while visiting the State.

- 2013 showed an increase in the proportion of overnight visitors that used their mobile device to research the local area while in Maine (32% versus 26% in 2012).



First time visitors, visitors **staying in paid accommodations**, visitors **with children**, and visitors **younger than 55** are all more likely than their counterparts to continue researching Maine while visiting the State.

1st time	**Repeat**
<80%>	62%
Paid Accommodations	**Unpaid Accommodations**
<68%>	57%
Have Kids	**No Kids**
<73%>	61%
18-55	**55+**
<70%>	55%

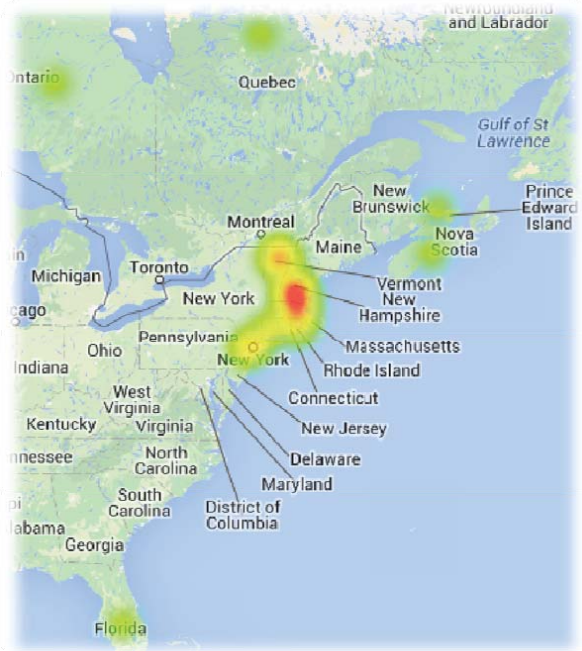
Regional Q31d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitor Travel Logistics

The majority of Maine overnight visitors did not consider any other destination for this specific trip.

- Of the 23% who did consider other destinations, most of these destinations were other New England states, New York, or the eastern Canadian provinces.

	2013 (n=2675)	Leisure (n=1424) a	VFR (n=791) b	Business (n=459) c
Any (NET)	23%	30%bc	16%	15%
New Hampshire	8%	11%bc	4%	3%
Vermont	6%	8%bc	3%	2%
Massachusetts	5%	7%bc	3%	1%
New York	3%	3%b	1%	4%b
Rhode Island	2%	3%bc	1%	<1%
Connecticut	2%	2%	1%	2%
New Brunswick (NB)	1%	1%	1%	1%
Quebec (PQ) – Montreal	1%	1%	1%	1%
Nova Scotia (NS)	1%	1%	1%	-
Florida	1%	1%	1%	<1%
Ontario/Toronto (ON)	1%	1%	1%	1%
Maritimes - Prince Edward Island, Victoria Park	1%	1%	1%	-
I didn't consider any others	74%	68%	82%a	81%a



Regional Q15. What other states or provinces, if any, did you consider for this specific trip?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

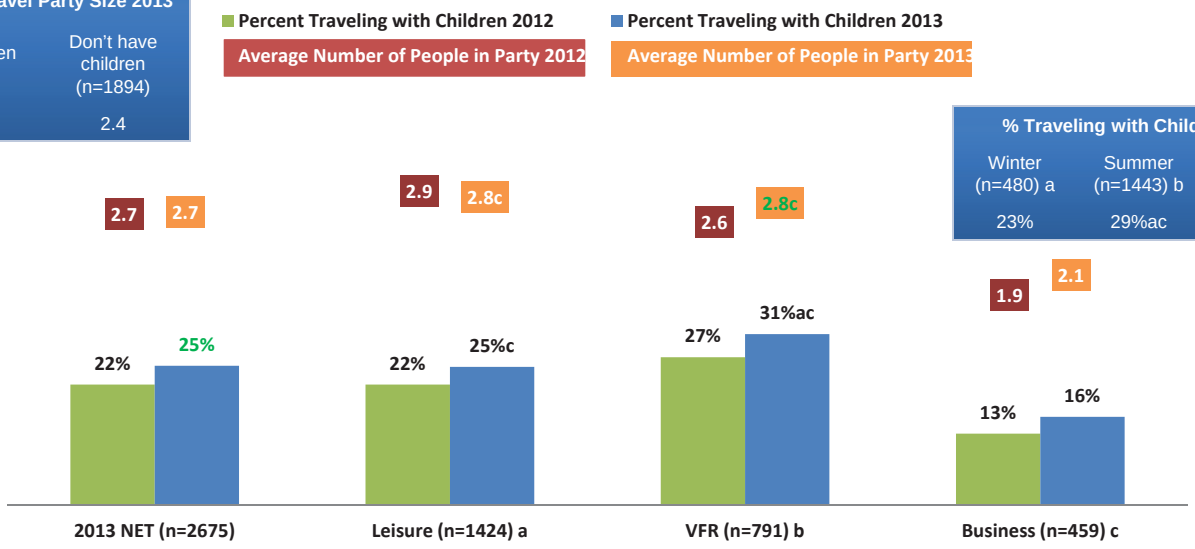
On average, overnight visitors to Maine are traveling in parties of 3, with one-fourth bringing children on their trip.

- 2013 saw an increase in the proportion of overnight visitors traveling with kids. Not surprisingly, travelers who were in Maine specifically to visit friends and relatives were more likely to be traveling with kids than leisure or business travelers.
- Summer travel appears to attract more visitors with children.

Average Travel Party Size 2013

Have children (n=781)	Don't have children (n=1894)
<3.4>	2.4

Travel Party Size and Composition



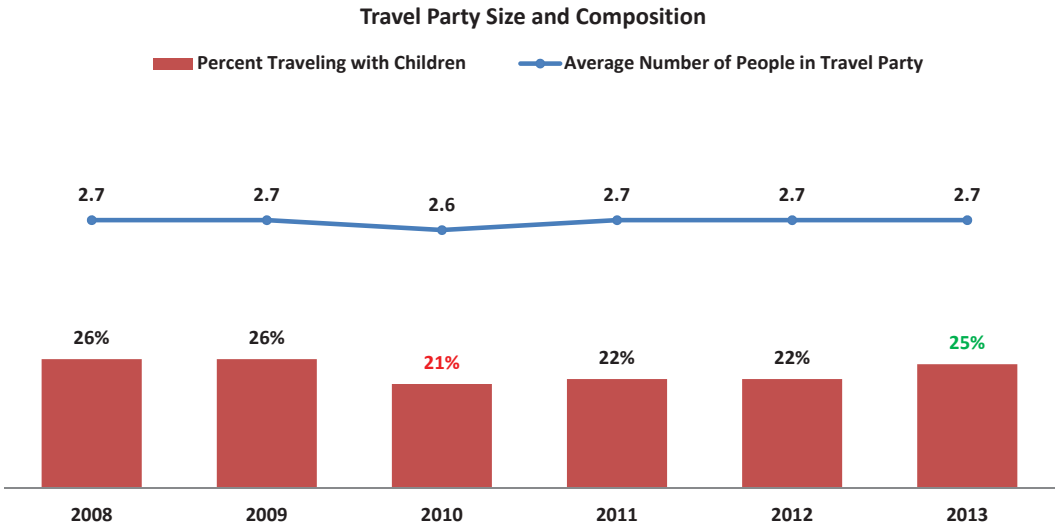
% Traveling with Children 2013

Winter (n=480) a	Summer (n=1443) b	Fall (n=753) c
23%	29%ac	20%

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

Average party size remained stable from 2008-2013, while the percentage traveling with kids has fluctuated somewhat.

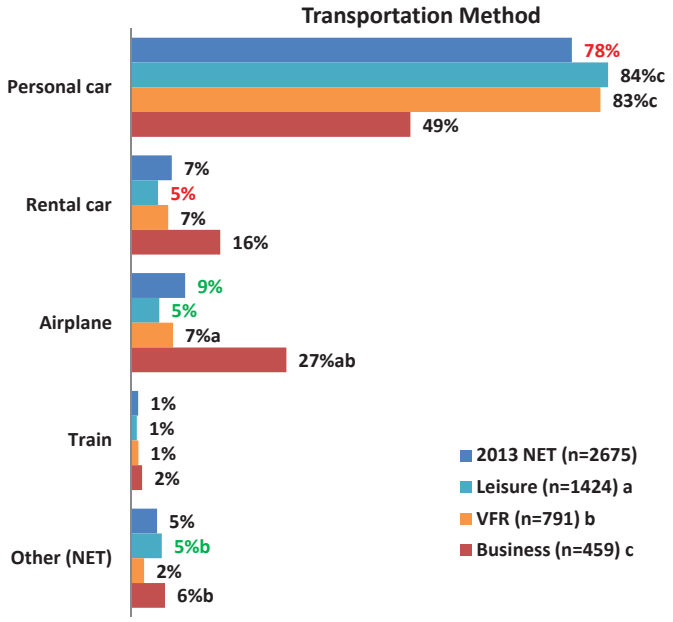
- The proportion of overnight travelers bringing children when they visit Maine dropped between 2009 and 2010, remained stable for a few years, and then showed a slight increase from 2012 to 2013.

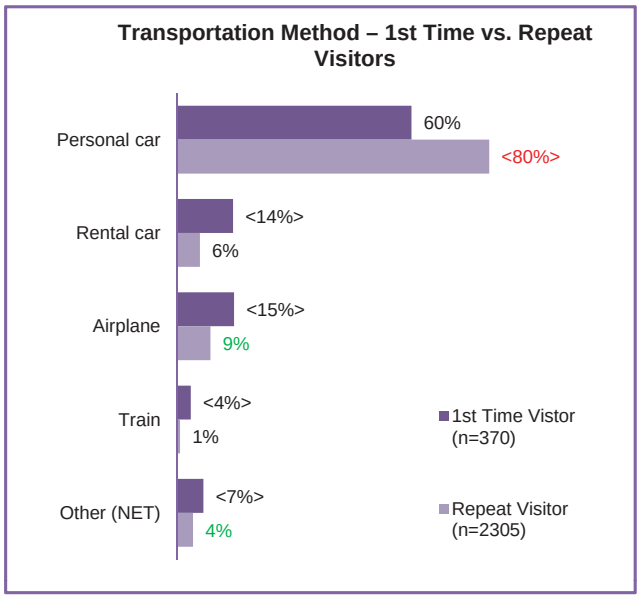


Regional Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Regional Q25. How many of these people were: Children?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text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

The personal car remains by far the dominant transportation mode for traveling to Maine among overnight guests.

- 2013 showed an increase in the proportion of visitors traveling to Maine by airplane and a decrease in the proportion arriving in their personal cars.
- Leisure and VFR travelers are the most likely to be using their personal car to travel to Maine, while business travelers are most likely to be arriving by airplane.
- Repeat visitors are more likely to use a personal car to travel to Maine, while first-time visitors are more likely to use all other means of transportation.

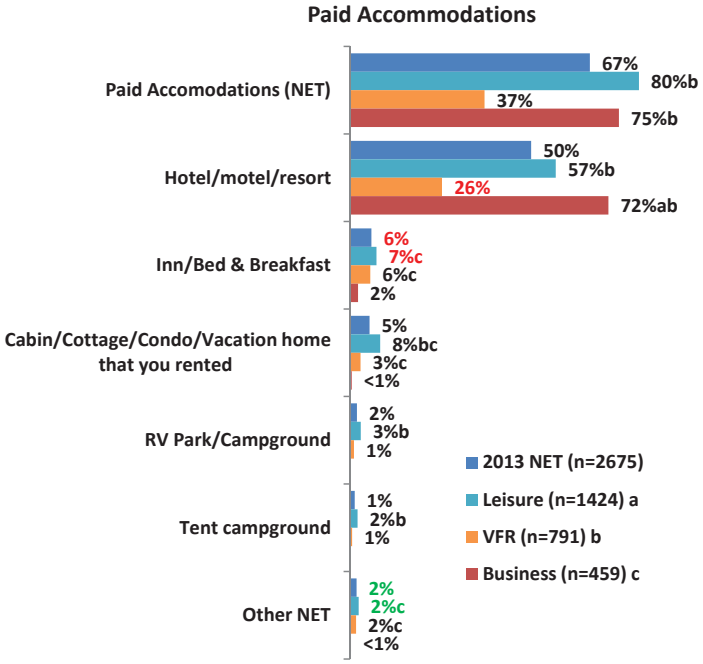


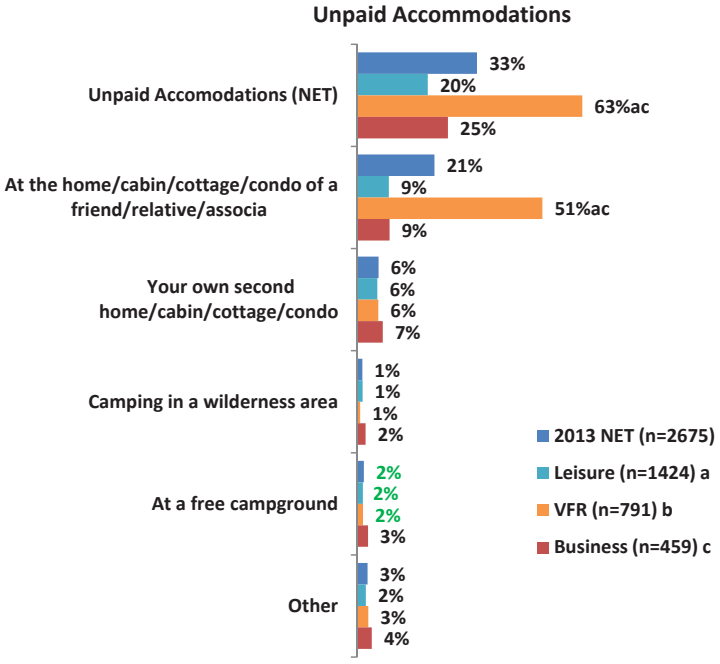


Regional Q26. Which of the following types of transportation did you use to travel the most miles from your home to get to your Maine destination?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Paid accommodations remain the primary lodging choice for Maine's overnight visitors, with most staying in hotels/motels/resorts.

- As expected, leisure and business travelers are more likely to stay in paid accommodations, while VFR travelers are more likely to be staying in unpaid accommodations.
- Canadian visitors are more likely than US visitors to stay in paid accommodations (78% versus 63%). Conversely, US visitors are more likely than Canadians to stay in unpaid accommodations (37% versus 22%).



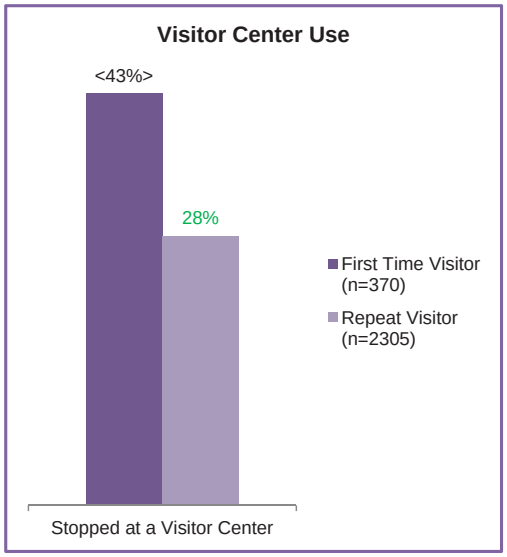


Regional Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Though visited by a minority of overnight travelers, Maine's Visitor Centers were used by a higher proportion of visitors in 2013 as compared to 2012.

- Business travelers are more likely than leisure and VFR travelers to stop at one of Maine's Visitor Centers, especially the ones located in Yarmouth and Houlton.
- Maine's Visitor Centers are more widely used by first-time visitors than repeat visitors (43% versus 28%).
- The Visitor Centers also appear to be more of a draw for travelers with children (39% versus 26% of those without children) and those under the age of 55 (34% versus 22% of those 55 years of age and older).

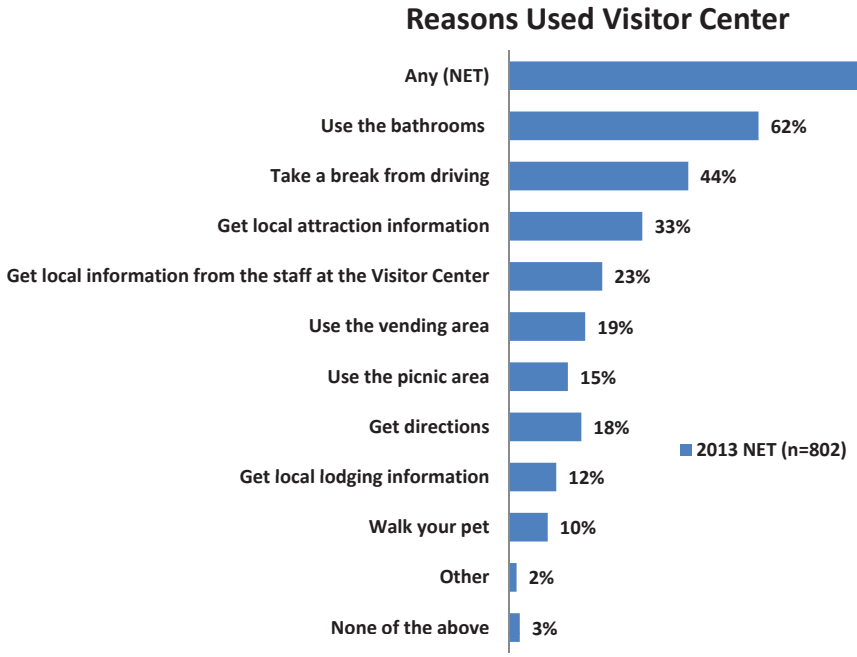
	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]
Any Visitor Center (NET)	30%	28%	29%	38%ab
Kittery	14%	14%	14%	13%
Yarmouth	5%	4%	4%	8%ab
Hampden North	4%	3%	5%a	7%a
Hampden South	4%	4%	4%	6%
Calais	4%	4%	4%	7%a
Houlton	3%	2%	3%	7%ab
West Gardiner	2%	1%	3%a	3%
Fryeburg	2%	2%	2%	2%
None of the above	70%	72%c	71%c	62%



Regional Q31a. Once you arrived in Maine did you stop at any of the Maine Visitor Centers?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The primary reason travelers stopped at any of Maine's Visitor Centers was to use the bathrooms.

- *Taking a break from driving* and *getting local attraction information* were also common reasons that visitors stopped at the Visitor Centers.



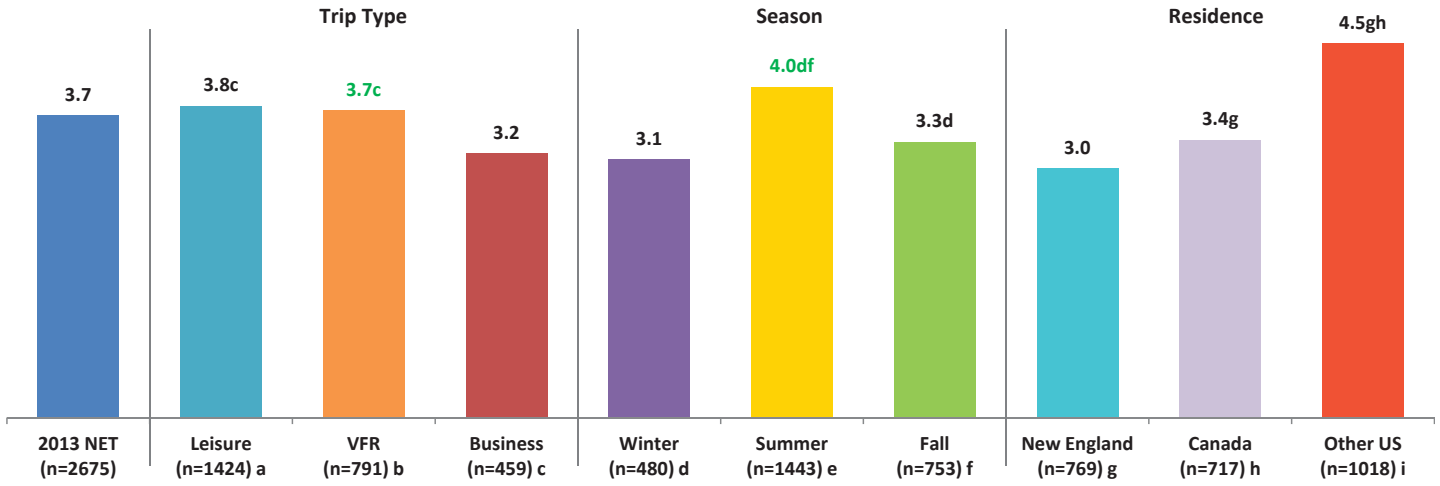
	Leisure (n=394) a	VFR (n=231) b	Business (n=177) c
Any (NET)	97%	98%	98%
Use the bathrooms	62%	66%c	54%
Take a break from driving	44%	51%c	35%
Get local attraction information	36%b	26%	35%
Get local information from the staff at the Visitor Center	23%	20%	27%
Use the vending area	17%	20%	20%
Use the picnic area	16%c	18%c	8%
Get directions	21%b	11%	21%b
Get local lodging information	11%	11%	13%
Walk your pet	10%	12%	6%
Other	3%	2%	<1%
None of the above	3%	2%	2%

Regional Q31b. What did you utilize the Maine Visitor Center(s) for during your visit?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

In 2013, overnight travelers stayed in Maine an average of 4 nights, with summer travelers and those from outside New England staying the longest.

- As shown in the chart below, length of stay was longest among leisure and VFR travelers, those traveling during the summer months, and domestic travelers from outside of New England.

Average Nights Away from Home

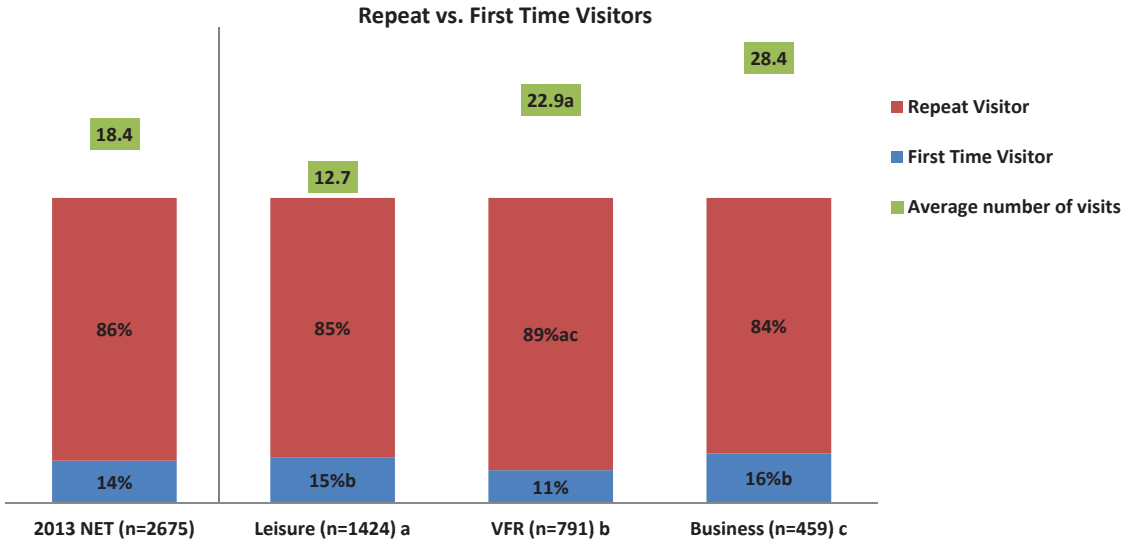


Regional Q8. On this trip to Maine, how many nights were you away from home?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The Maine Overnight Visitor Experience

Maine's visitor loyalty continues to be demonstrated through its high repeat visitation.

- As expected, VFR travelers are most likely to be repeat visitors.
- Business travelers, on average, have taken the greatest number of trips to Maine in the past five years.

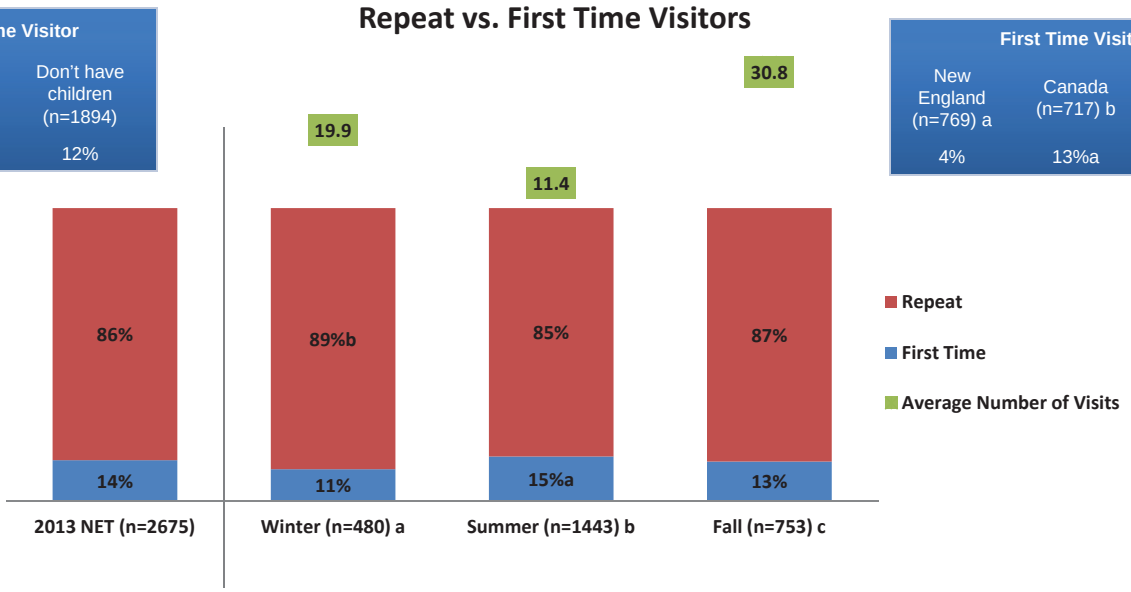


Regional Q9. Was this your first visit in Maine?
Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

There is very little seasonal variability seen in the proportion of first-time and repeat visitors.

- Fall travelers appear to have taken more trips in Maine, on average, in the past five years than travelers visiting Maine during the Summer or Winter seasons.
- Domestic visitors from outside of New England are the most likely to be first-time visitors to Maine (24% versus 14% of all visitors), as are those traveling with children (18% versus 12% traveling without children).

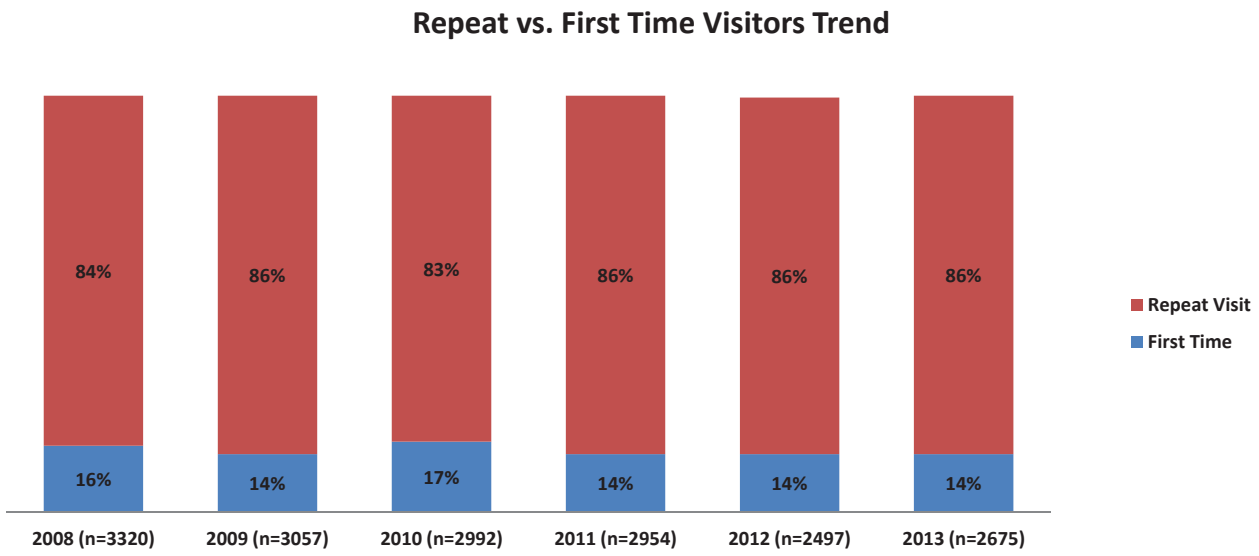
First Time Visitor	
Have children (n=781)	Don't have children (n=1894)
<18%>	12%



First Time Visitor		
New England (n=769) a	Canada (n=717) b	Other US (n=1018) c
4%	13%a	24%ab

Regional Q9. Was this your first visit in Maine?
Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?
a, b, c indicates significant difference at the 95% confidence level

The high proportion of repeat visitors to Maine has remained stable from 2008-2013.



Regional Q9. Was this your first visit in Maine?
Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Travelers continue to visit Maine for its beautiful scenery, coastline, and relaxing atmosphere.

- Leisure travelers are more likely to list several reasons for selecting Maine, from its *beautiful scenery* and *relaxing atmosphere* to its *good accommodations* and *outdoor recreation options*.

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]
Beautiful scenery	47%	57%bc	44%c	23%
Enjoy the coastline	43%	55%bc	39%c	15%
Relaxing atmosphere	43%	50%bc	42%c	22%
Easy to get to	34%	40%bc	32%c	17%
Good food	33%	39%bc	30%c	18%
Affordable	31%	35%bc	30%c	16%
Good accommodations	25%	31%bc	20%	16%
Outdoor recreation options	25%	30%bc	23%c	11%
What I am familiar with/It's tradition	24%	25%c	30%ac	11%
Lots to do	24%	27%c	25%c	12%
Interesting attractions	19%	23%c	19%c	9%
To view the mountains and wildlife	19%	24%bc	17%c	8%
Location of special event (such as festival, wedding, graduation, summer camp)	14%	9%	24%ac	14%
It's different from other places	14%	16%bc	12%	10%
Interesting history/culture	12%	13%	11%	9%
Work related trip	11%	2%	3%	53%ab
Have a summer home/timeshare/place to stay there	11%	9%c	18%ac	5%
It was recommended to me	9%	9%	9%	8%
Other (Please specify)	13%	9%	23%ac	8%

Regional Q16. Thinking about all the places you could have chosen to visit on this trip, why did you choose Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine's summer visitors are drawn to the State for its beauty, atmosphere, and outdoor recreation.

	NET 2013 (n=2675)	Winter (n=480) [a]	Summer (n=1443) [b]	Fall (n=753) [c]	Paid Accommodations (n=1785) [d]	Unpaid Accommodations (n=890) [e]
Beautiful scenery	47%	40%	51%ac	43%	47%	46%
Enjoy the coastline	43%	35%	47%ac	40%	46%e	37%
Relaxing atmosphere	43%	37%	48%ac	37%	42%	44%
Easy to get to	34%	33%	31%	39%b	34%	33%
Good food	33%	32%	34%	31%	34%	31%
Affordable	31%	30%	30%	32%	31%	30%
Good accommodations	25%	24%	27%	23%	28%e	19%
Outdoor recreation options	25%	20%	28%ac	21%	23%	27%
What I am familiar with/It's tradition	24%	20%	24%	27%a	21%	30%d
Lots to do	24%	19%	27%ac	22%	24%	25%
Interesting attractions	19%	14%	22%ac	17%	19%	20%
To view the mountains and wildlife	19%	17%	21%	17%	19%	20%
Location of special event (such as festival, wedding, graduation, summer camp)	14%	15%	14%	15%	12%	19%d
It's different from other places	14%	11%	16%ac	11%	14%	13%
Interesting history/culture	12%	11%	13%	11%	11%	14%d
Work related trip	11%	16%bc	10%	9%	13%e	7%
Have a summer home/timeshare/place to stay there	11%	9%	11%	11%	4%	25%d
It was recommended to me	9%	9%	10%	8%	10%e	7%
Other	13%	13%	12%	15%	10%	19%d

Regional Q16. Thinking about all the places you could have chosen to visit on this trip, why did you choose Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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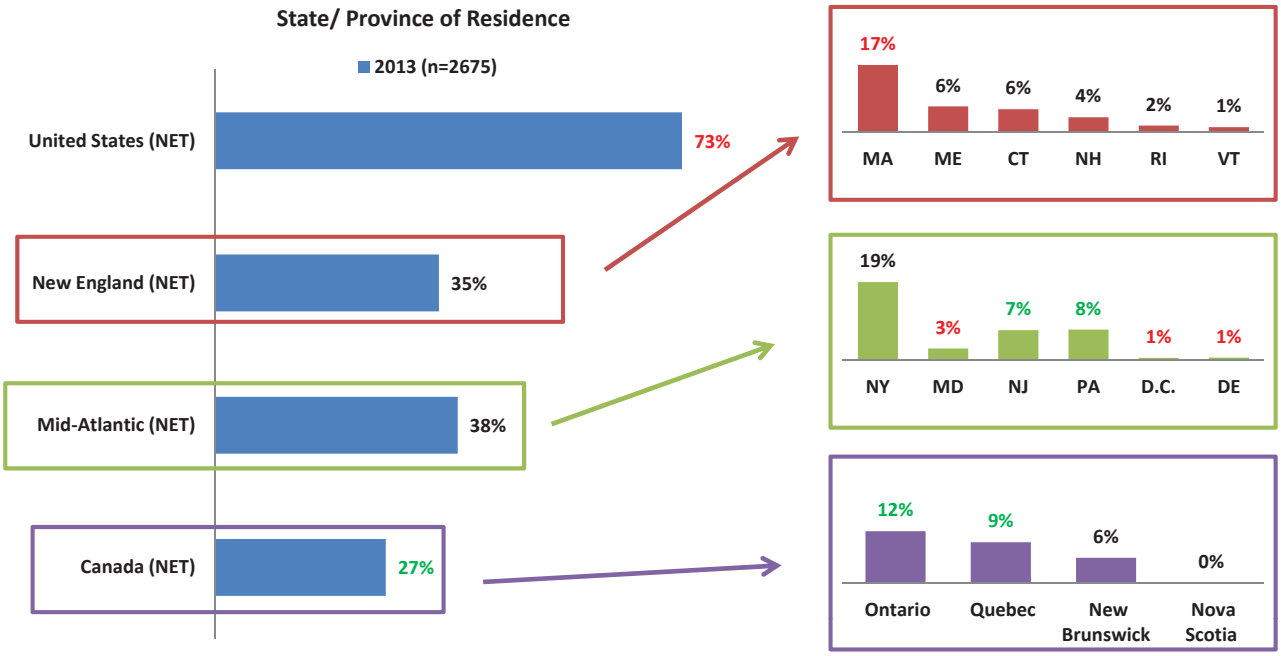
2013 showed a drop in the proportion of US visitors to Maine and an increase in the proportion of Canadian visitors, as compared to 2012.

- This increase in Canadian visitation continues a trend also seen in 2012, as compared to 2011.
- Massachusetts and New York continue to source the greatest proportion of overnight visitors to Maine, with Ontario and Quebec also pulling in about one-tenth of Maine's overnight visitors in 2013.



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

VFR travelers are most likely to be coming from Massachusetts and Connecticut.

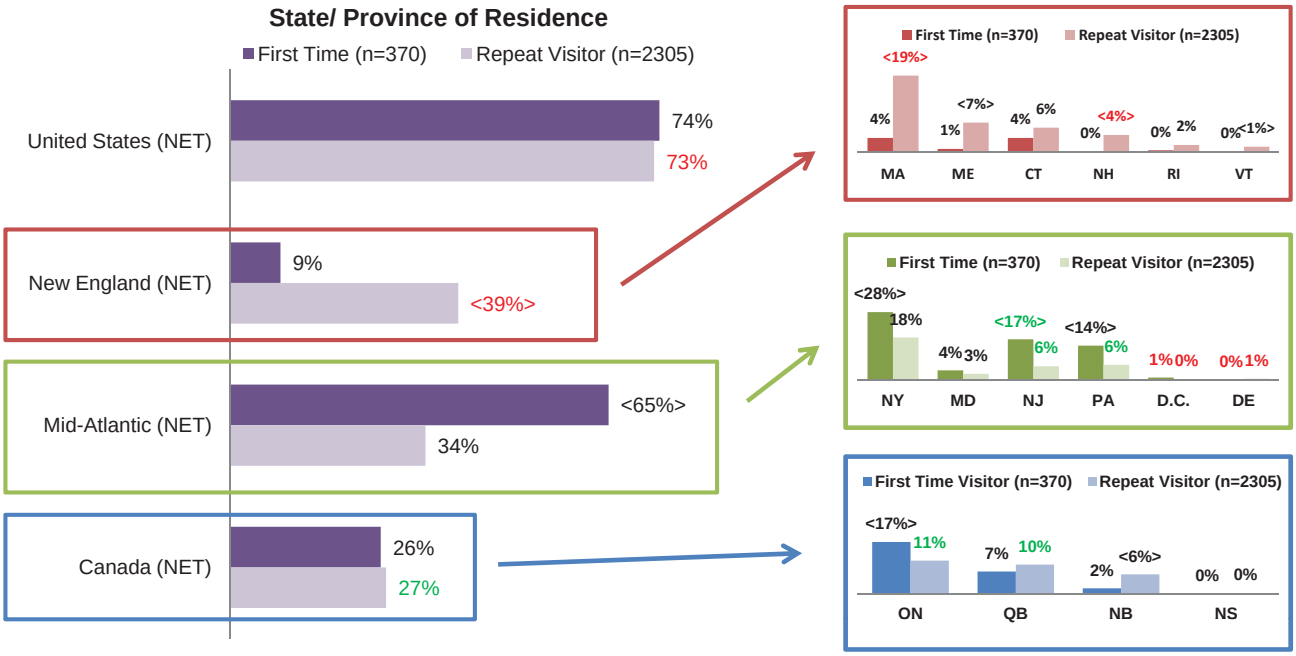
- Summer travel to Maine is more popular among visitors from the Mid-Atlantic region than Winter and Fall travel, while winter travel is more popular among Canadians.

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]	Winter (n=480) [d]	Summer (n=1443) [e]	Fall (n=753) [f]
United States (NET)	**73%**	69%	86%ac	65%	66%	77%df	71%d
New England (NET)	35%	32%	48%c	24%	37%	27%	49%e
Massachusetts	17%	16%c	21%ac	10%	20%e	14%	20%e
Maine	6%	4%	10%a	6%	5%e	2%	15%de
Connecticut	6%	5%	8%ac	3%	5%	6%	6%
New Hampshire	4%	3%	5%	2%	3%	3%	5%
Rhode Island	2%	2%	2%	1%	2%	1%	2%
Vermont	1%	1%	2%	1%	1%	1%	2%
Mid-Atlantic (NET)	38%	37%	38%	42%	29%	49%	22%
New York	19%	20%	20%	18%	16%	24%df	12%
Pennsylvania	**8%**	7%	8%	9%	5%	11%df	3%
New Jersey	**7%**	7%	6%	9%	6%	10%df	4%
Maryland	3%	2%	3%	5%	2%	4%df	2%
Delaware	**1%**	1%	1%	1%	0%	1%	1%
Washington D.C.	**1%**	0%	1%a	0%	1%	1%f	0%
Canada (NET)	**27%**	31%b	14%	35%b	34%ef	23%	29%e
Ontario	**12%**	12%b	6%	21%ab	20%ef	11%f	8%
Quebec	**9%**	11%b	6%	10%b	8%	10%d	9%
New Brunswick	6%	9%bc	2%	3%	6%e	2%	12%de
Nova Scotia	0%	0%	0%	1%	0%	0%	0%

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

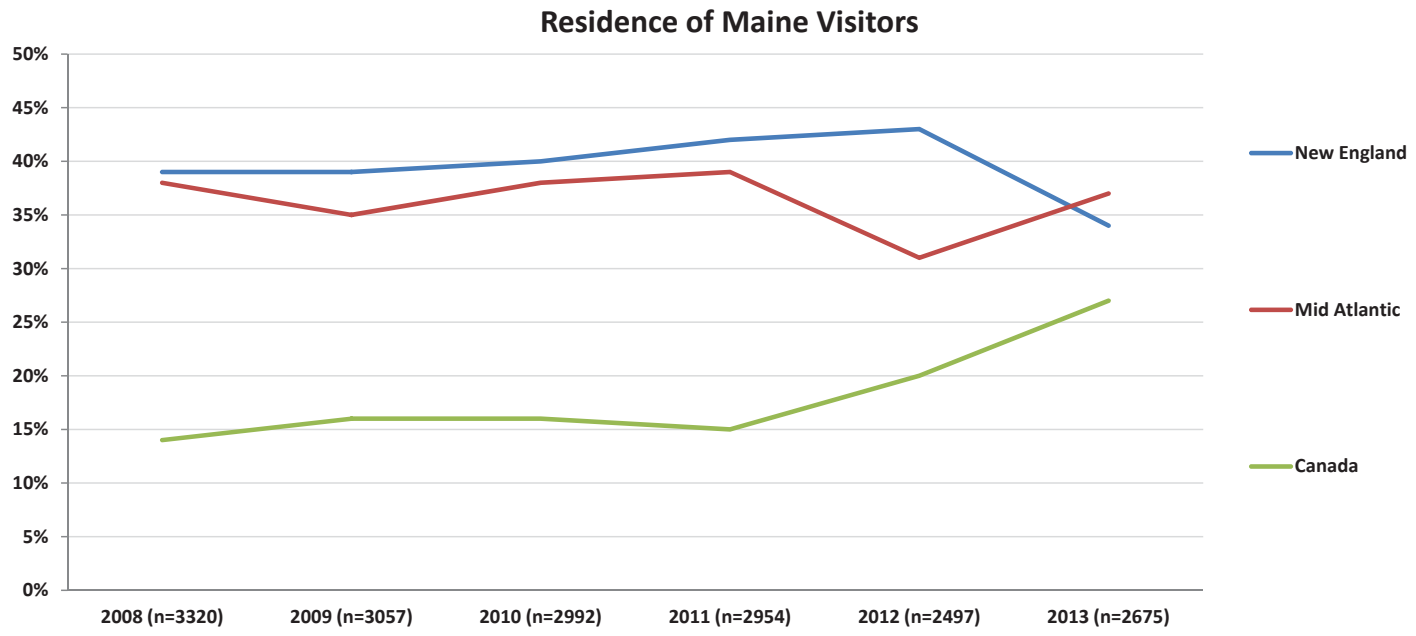
The Mid-Atlantic region sends more first-time visitors to Maine, while visitors arriving from New England are more likely to be repeat visitors.

- Within the Mid-Atlantic region, first-time visitors are more likely than repeat visitors to be coming from New York, New Jersey, and Pennsylvania.
- Canadian first-time visitors are most likely to be from Ontario, while repeat visitors from New Brunswick are more prevalent.



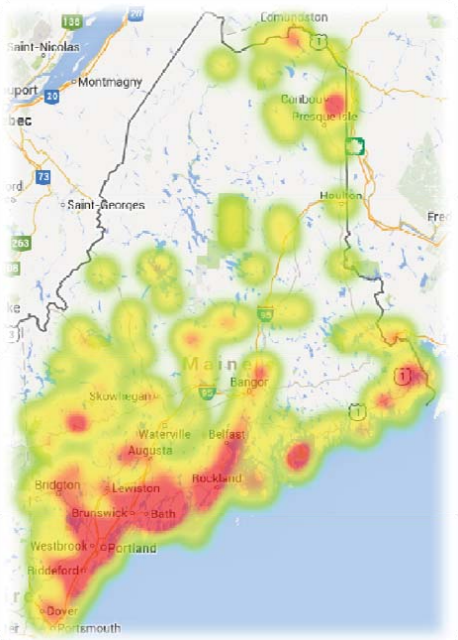
State/ Province of Residence
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

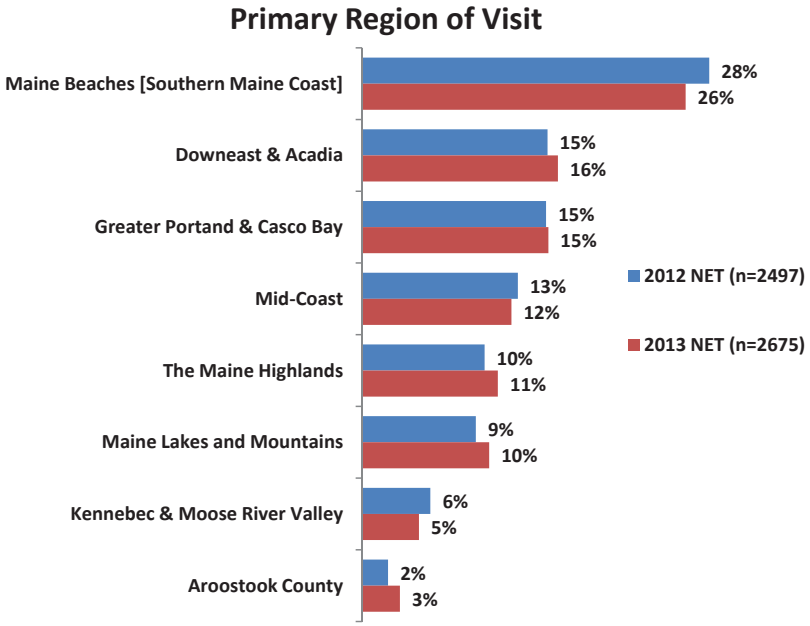
After showing relative stability between 2008 and 2011, the geographic sources of Maine overnight visitors has fluctuated in 2012 and 2013.



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

Regional visitation patterns in Maine remain unchanged over prior years, with the Maine Beaches attracting the highest proportion of overnight visitors.

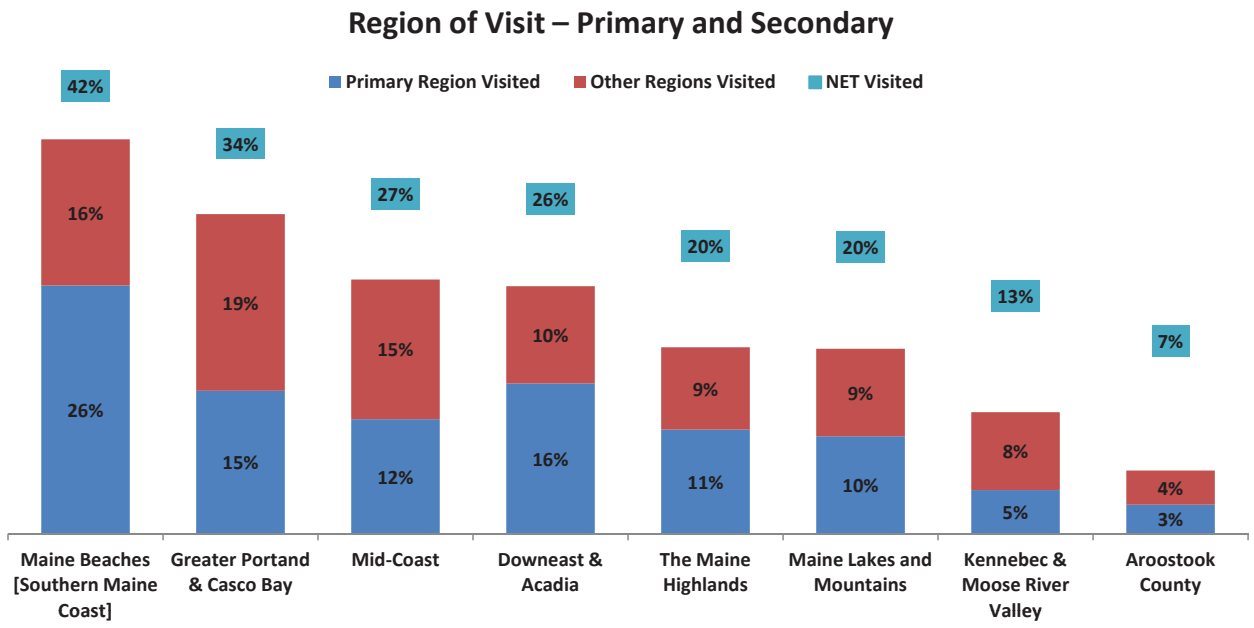




Regional Q28. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The Greater Portland/Casco Bay region showed the highest proportion of overnight visitors listing it as a *secondary* region they visited while in Maine.

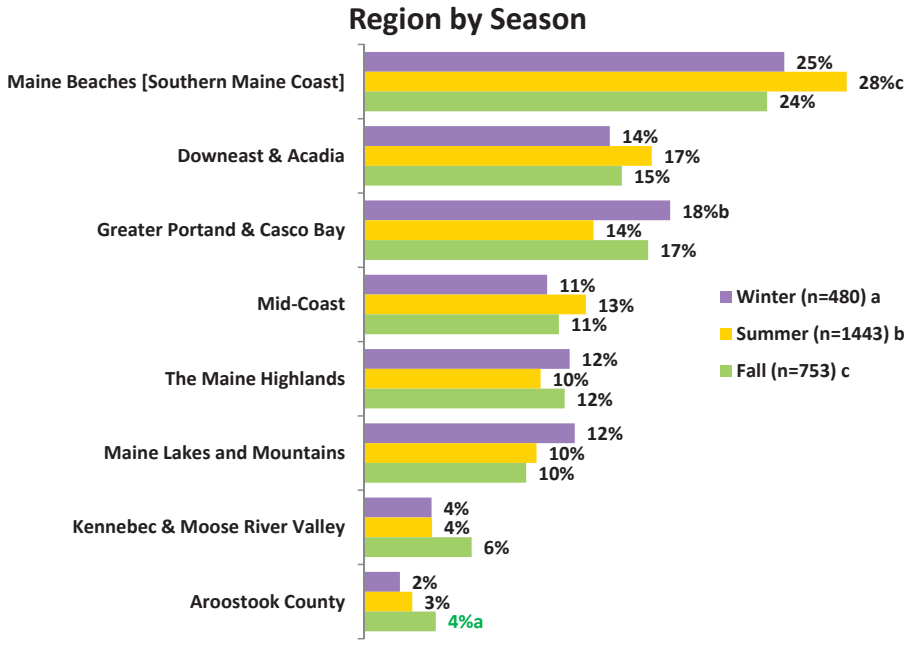
- When adding travelers' primary regional destination in Maine to secondary regions they also visited while in Maine, the Maine Beaches remains the most visited regional destination in Maine for 2013. Greater Portland/Casco Bay region comes in next, followed by the Mid-Coast and Downeast/Acadia regions.



Regional Q28. What region in Maine was your primary destination?
Q29. What other regions, if any, did you visit while you were in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Very little seasonal variation is seen in the primary regional destinations of Maine's overnight visitors.

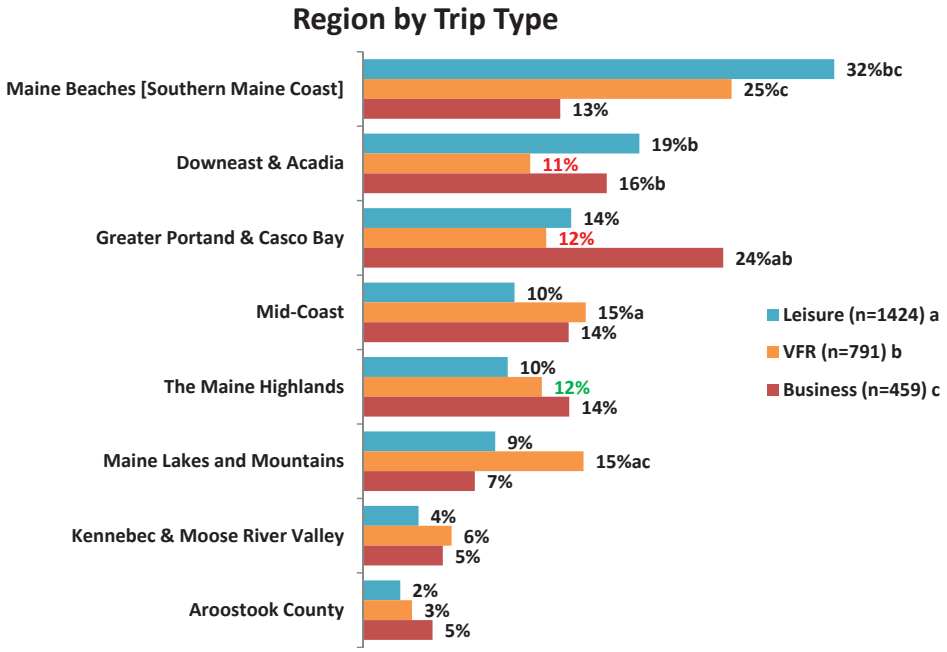
- One exception is the Maine Beaches area, which not surprisingly is more apt to attract summer visitors.



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

Leisure travelers are more apt to be visiting the Maine Beaches region, while business travelers are more likely to visit the Greater Portland region.

- VFR travelers are more prevalent in the Maine Lakes & Mountains region than are leisure and business travelers.

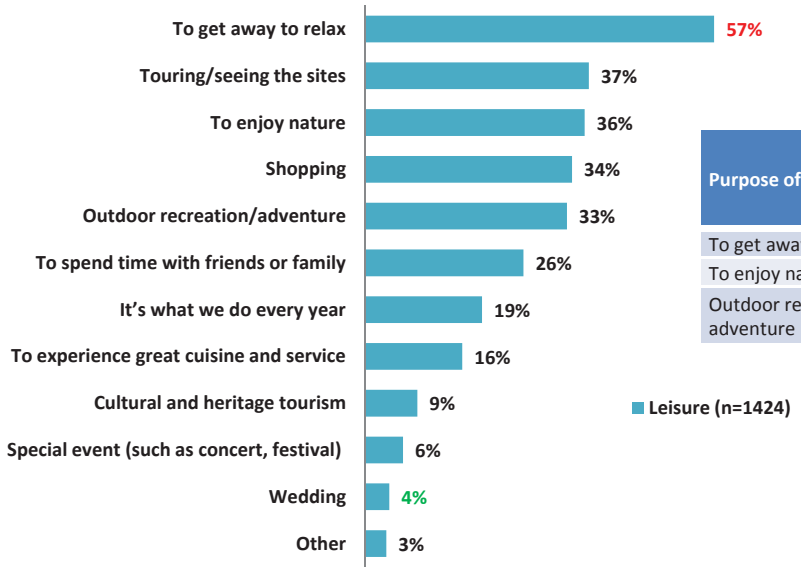


Regional Q28. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight leisure travelers continue to visit Maine in order to get away to relax.

- Enjoying nature, seeing the sites, outdoor recreation, and shopping round out the next most popular reasons people visited Maine in 2013.
- Summer leisure visitors are more likely than visitors during Winter or Fall to be visiting Maine *to get away to relax, to enjoy nature,* and for *outdoor recreation/adventure*.

Primary Purpose of Overnight Leisure Trips

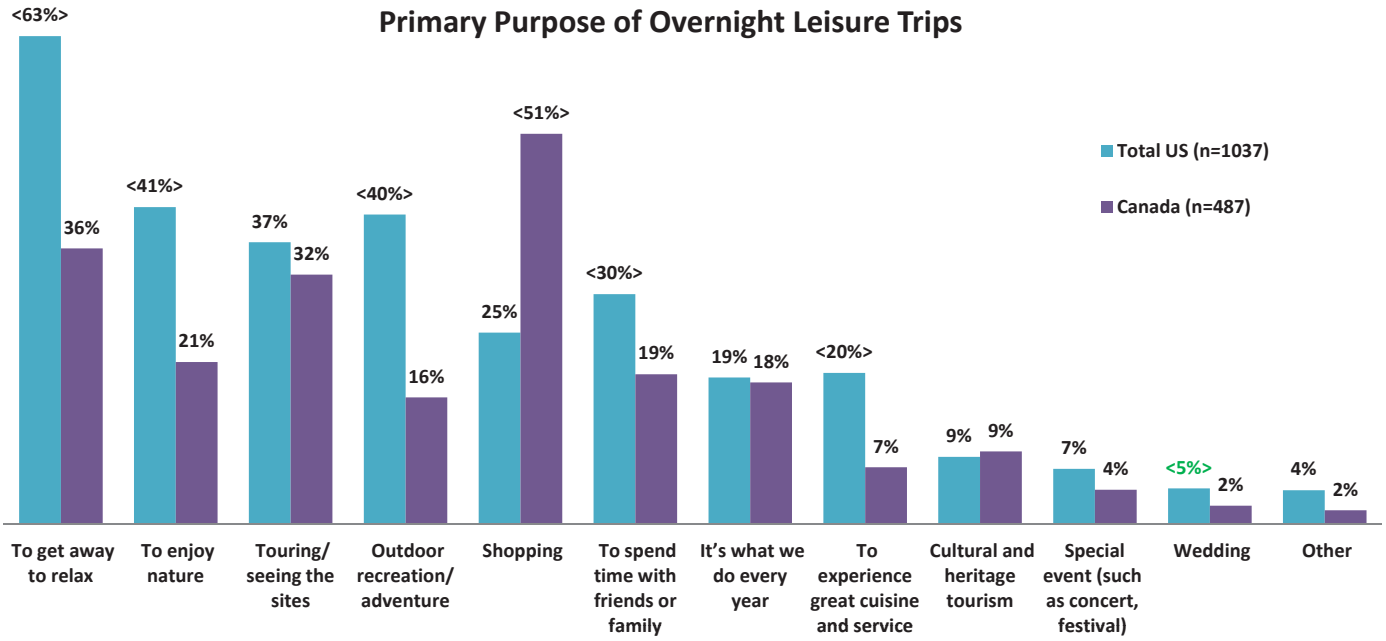


Purpose of trip by season	Winter (n=246) [d]	Summer (n=910) [e]	Fall (n=451) [f]
To get away to relax	50%	59%ac	49%
To enjoy nature	28%	40%ac	30%
Outdoor recreation/ adventure	27%	38%ac	26%

Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?
*Includes Wedding before 06/2012. Due to the revision in answer options in 2012, direct comparisons between 2011 and 2012 data can not be made.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

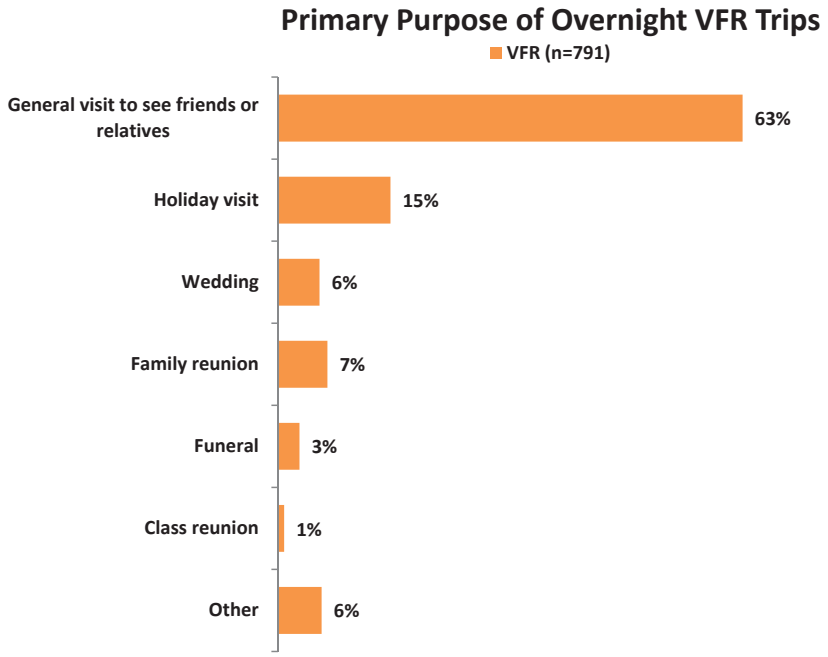
Canadian visitors continue to vacation in Maine primarily for shopping.

- Domestic visitors are more likely than Canadians to be visiting Maine *to get away to relax, to enjoy nature,* for *outdoor recreation, to spend time with friends or family*, and *to experience great cuisine and service*.



Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?
*Includes Wedding before 06/2012. Due to the revision in answer options in 2012, direct comparisons between 2011 and 2012 data can not be made.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

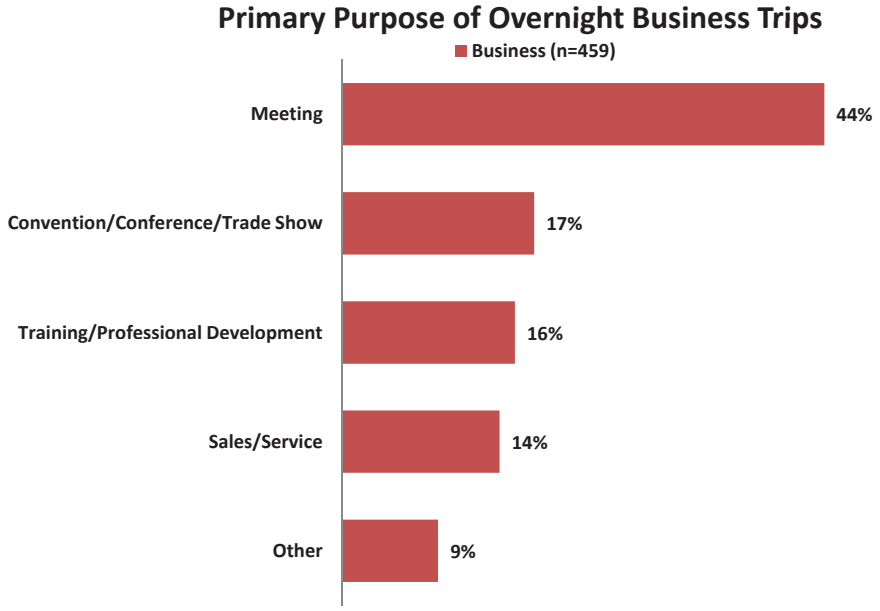
The most widely cited primary trip purpose for VFR travelers was a general visit to see friends or relatives.



Regional Q6. What was the primary purpose of your most recent visit to friends or relatives in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

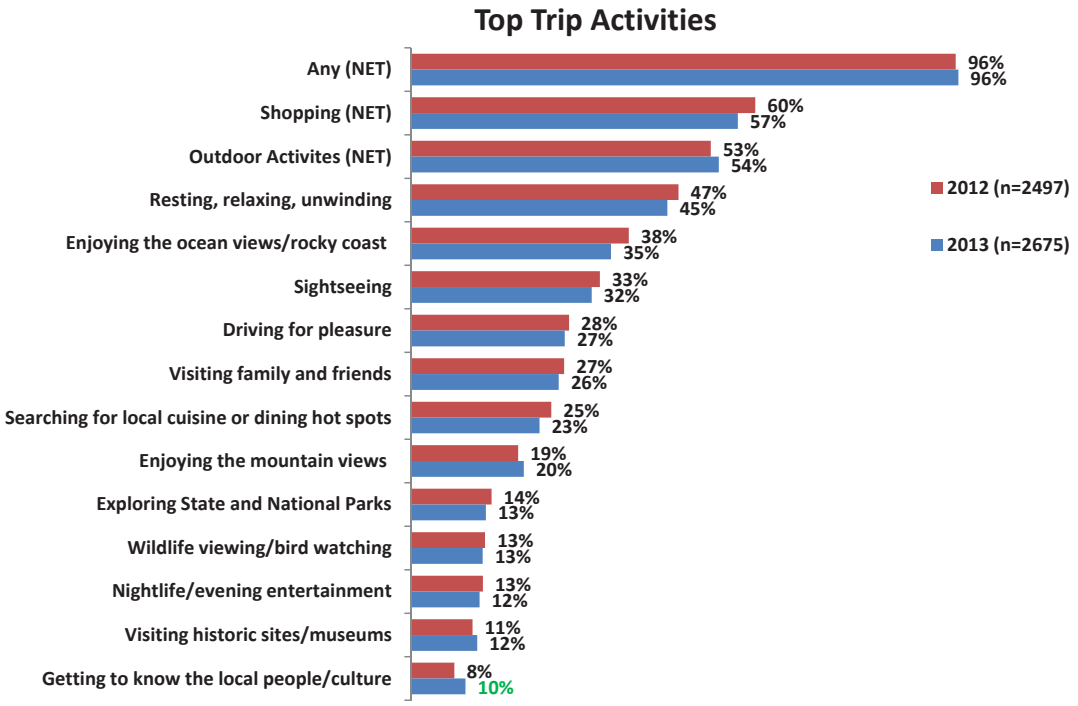
Business travelers are most likely to be staying in Maine for a general meeting, especially Canadian business travelers.

- Business travelers in Maine for the first time are more likely than repeat visitors to be in Maine for a convention/conference/trade show (32% versus 15% among repeat visitors), illustrating the importance of convention/conference business in introducing Maine to potential future visitors.



Regional Q5. What was the primary purpose of your most recent business trip in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Unchanged from prior years, more than half of Maine's overnight visitors enjoyed *shopping* and various *outdoor activities.*



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Logically, the activities travelers pursue while visiting Maine differ by trip type and season of visit.

- Summer visitors are more likely to be enjoying outdoor activities, rest and relaxation, the ocean, and dining out than are those visiting during other seasons.

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]	Winter (n=480) [d]	Summer (n=1443) [e]	Fall (n=753) [f]
Any (NET)	96%	99%bc	97%c	85%	93%	97%d	96%d
Shopping (NET)	57%	65%bc	53%c	40%	56%	57%	58%
Outdoor Activities (NET)	54%	59%c	55%c	37%	42%	62%df	46%
Resting, relaxing, unwinding	45%	51%c	49%c	19%	37%	49%df	42%
Enjoying the ocean views/rocky coast	35%	44%bc	32%c	13%	27%	40%df	31%
Sightseeing	32%	38%bc	26%	21%	29%	34%f	29%
Driving for pleasure	27%	33%bc	24%c	13%	26%	27%	27%
Visiting family and friends	26%	13%	59%ac	10%	23%	26%	28%
Searching for local cuisine or dining hot spots	23%	26%c	22%c	12%	18%	26%df	19%
Enjoying the mountain views	20%	24%bc	18%c	10%	19%	21%	17%
Exploring State and National Parks	13%	16%bc	12%c	6%	9%	15%d	13%
Wildlife viewing/bird watching	13%	13%c	13%	9%	11%	13%	12%
Nightlife/evening entertainment	12%	10%	14%a	13%	14%	12%	11%
Visiting historic sites/museums	12%	14%bc	9%	9%	11%	13%	10%
Getting to know the local people/culture	10%	10%c	11%c	6%	8%	11%	8%
Viewing fall colors	9%	10%c	8%	6%	6%e	4%	20%de
Visiting art museums or local artisan exhibits	7%	8%	7%	6%	7%	8%	7%
Nature cruises/tours	7%	10%bc	4%	5%	4%	10%df	5%
Attending fairs or festivals	7%	6%	10%ac	5%	5%	8%d	7%
Taking tours of communities or local architecture	7%	7%c	5%	8%	4%	8%	6%
Amusement park/water park	5%	6%c	5%	3%	4%	5%	4%
Other	4%	3%	4%	4%	4%	3%	4%
None of the above	4%	1%	3%a	15%ab	7%ef	3%	4%

Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine's parks, historic sites, and fall colors are more popular among first-time visitors than repeat visitors.

- Repeat visitors are more likely than first-time visitors to be shopping and enjoying the ocean and mountain views while visiting Maine.

	NET 2013 (n=2675)	First Time Visitor (n=357) a	Repeat Visitor (n=2305) b	Paid Accommodations (n=1785) c	Unpaid Accommodations (n=890) d
Any (NET)	96%	95%	96%	96%	97%
Shopping (NET)	57%	46%	59%a	61%d	50%
Outdoor Activites (NET)	54%	59%	53%	52%	58%c
Resting, relaxing, unwinding	45%	39%b	31%	43%	49%c
Enjoying the ocean views/rocky coast	35%	33%	47%a	38%d	29%
Sightseeing	32%	32%	36%	35%d	26%
Driving for pleasure	27%	24%	27%	29%d	24%
Visiting family and friends	26%	23%	19%	14%	50%c
Searching for local cuisine or dining hot spots	23%	19%	23%	25%d	19%
Enjoying the mountain views	20%	18%	27%a	19%	21%
Exploring State and National Parks	13%	17%b	11%	13%	13%
Wildlife viewing/bird watching	13%	17%	13%	11%	16%c
Nightlife/evening entertainment	12%	14%	11%	11%	13%
Visiting historic sites/museums	12%	13%b	7%	13%d	9%
Getting to know the local people/culture	10%	11%	13%	9%	11%
Viewing fall colors	9%	11%b	6%	8%	9%
Visiting art museums or local artisan exhibits	7%	10%	7%	7%	7%
Nature cruises/tours	7%	10%	10%	9%d	5%
Attending fairs or festivals	7%	9%	9%	6%	10%c
Taking tours of communities or local architecture	7%	9%	7%	7%	6%
Amusement park/water park	5%	8%b	4%	4%	7%c
Other	4%	2%	4%	4%	3%
None of the above	4%	5%	4%	4%	3%

Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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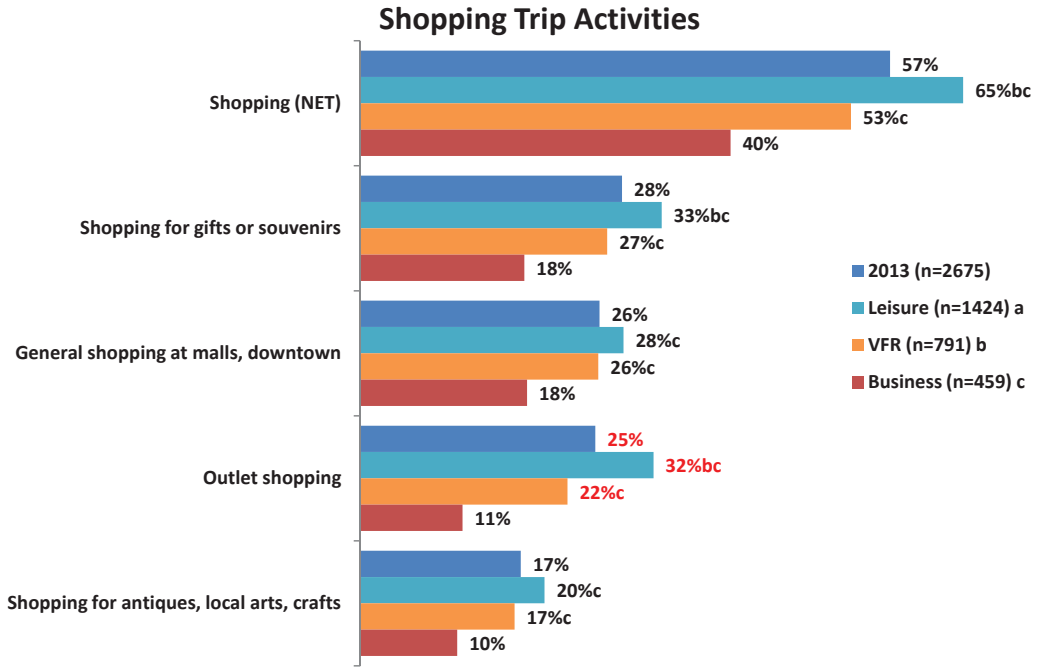
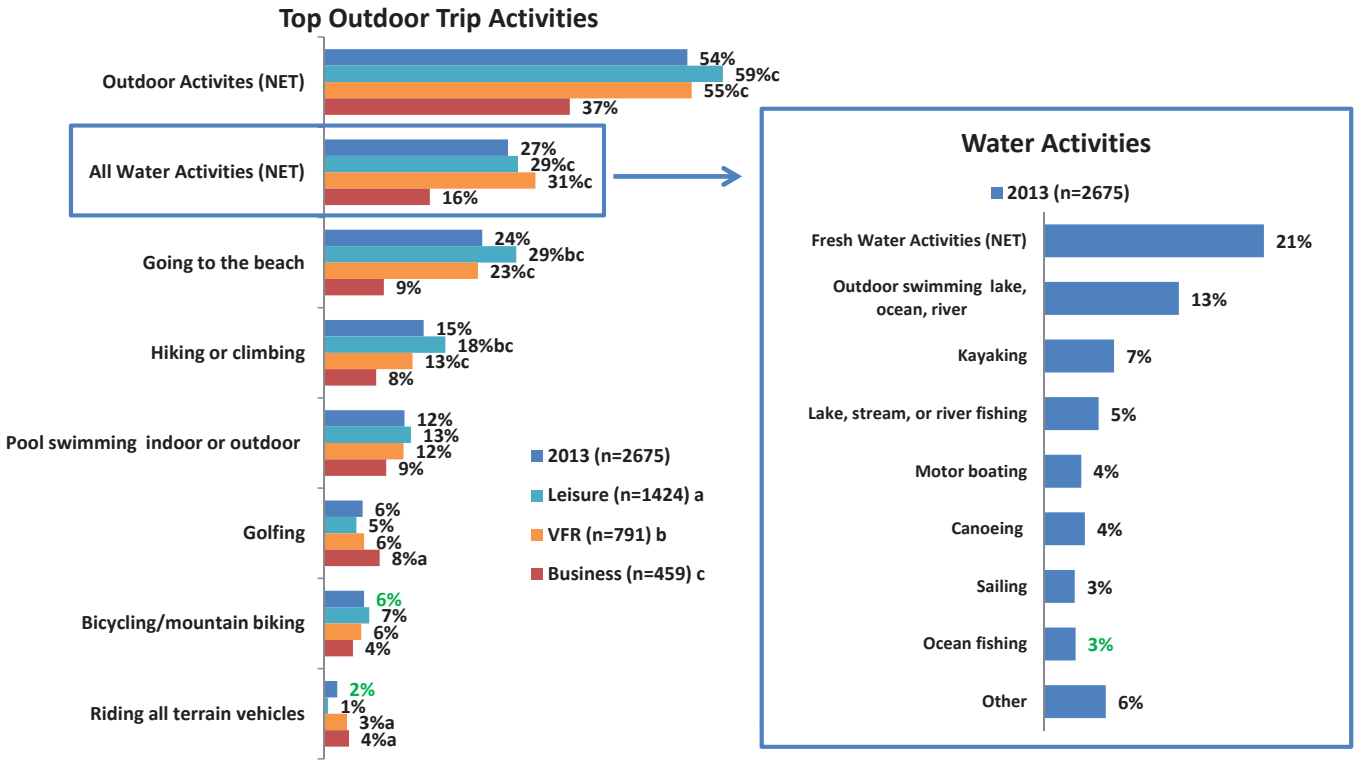
Shopping activities are spread out relatively evenly between the different types of shopping.

- Outlet shopping shows a decrease from 2012 levels (25% versus 31% in 2012).



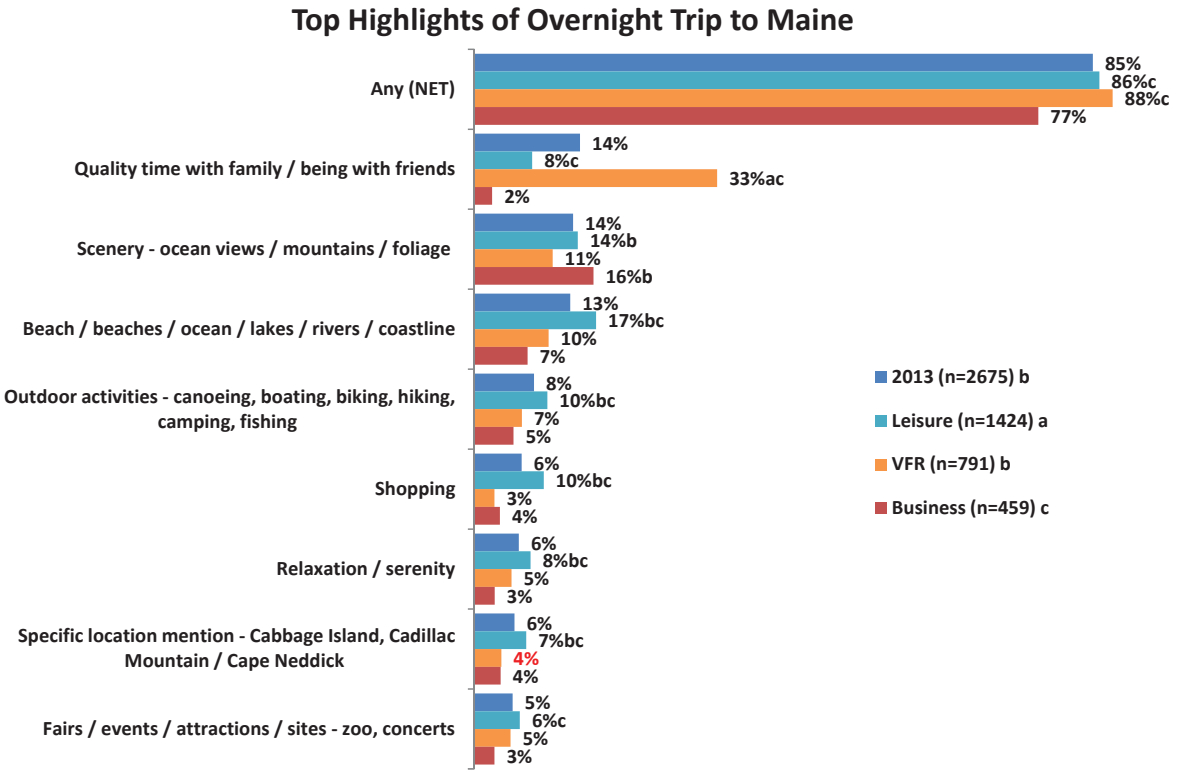
Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Various water activities and going to the beach remain the top outdoor activities among 2013 overnight visitors.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The main highlights of visitors' trips to Maine include quality time spent with family/friends, enjoying Maine's scenery, and enjoying various coastal areas.



Regional Q35. What was the highlight of this specific trip to Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Visitors' top complaints about their trip to Maine center around wanting more time to spend here and poor weather.

- One-third of Maine's overnight visitors didn't cite anything that could have been better on this trip in Maine.

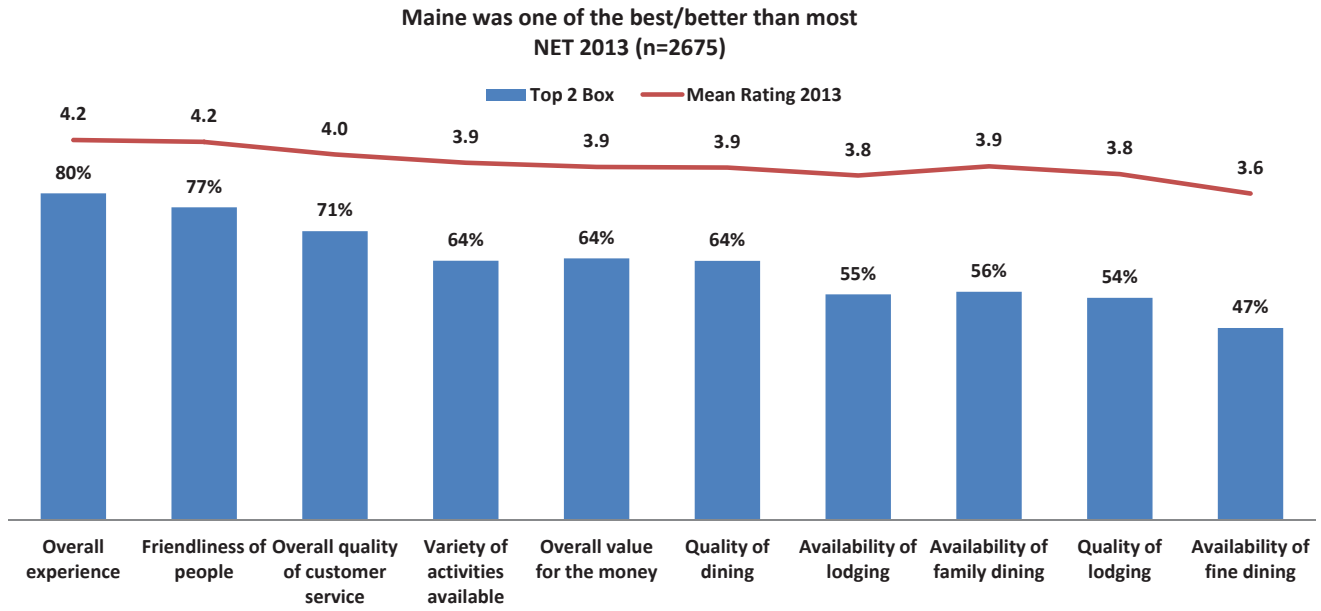
Top Aspects That Could Have Been Better on Overnight Trip in Maine - By Trip Type & Season

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]	Winter (n=480) [d]	Summer (n=1443) [e]	Fall (n=753) [f]
Any (NET)	**66%**	**66%**	**67%**	**62%**	**62%**	**70%df**	**60%**
More time to spend	18%	15%	21%a	24%a	19%	19%	17%
Better weather / less rain	15%	17%c	15%c	8%	17%f	15%	12%
Not much / everything was great	6%	6%c	7%c	4%	3%	8%df	5%
Lodging accommodations - cheaper, availability, need updating	5%	7%bc	3%	3%	3%	6%d	5%
Better dining / more restaurants / bars	4%	3%	3%	6%	3%	4%	4%
Cheaper prices - not specific	2%	2%	2%	1%	3%	2%	2%
Less traffic	2%	2%	2%	1%	1%	2%	1%
Logistical issues - fighting family members, didn't like camper, car broke down	1%	1%	2%	1%	2%	1%	2%
Less driving time	1%	1%	2%	1%	1%	2%	1%
Cheaper fuel / gas prices	1%	1%	1%	1%	1%	1%	1%
More to do	1%	1%	1%	-	1%	<1%	2%
Shopping - more outlets, better deals, longer hours	1%	1%	1%	1%	1%	1%	1%
More money to spend	1%	1%b	<1%	-	1%f	1%	<1%
Less work	1%	-	-	3%	2%ef	<1%	<1%
Other	7%	7%	6%	9%	6%	7%	8%
None/nothing/na	**21%**	**21%**	**21%**	**25%**	**24%e**	**18%**	**25%e**
No Answer	**12%**	**13%**	**11%**	**12%**	**13%**	**11%**	**15%e**

Regional Q36. What do you wish could have been better on this trip in Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

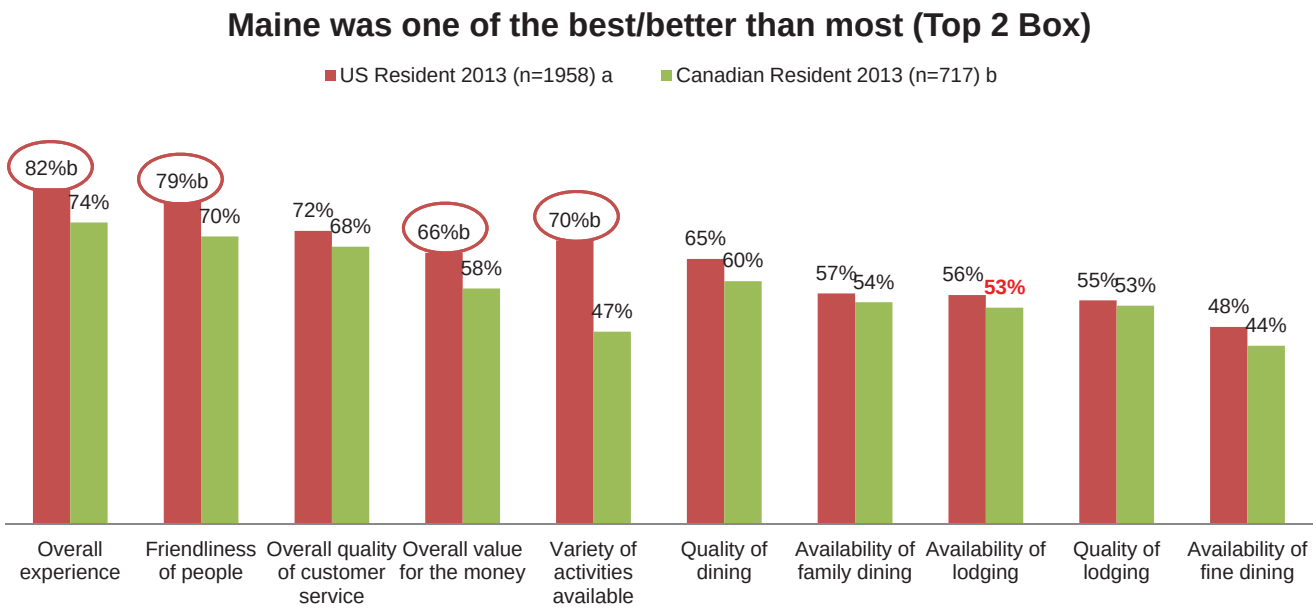
Maine continues to shine in comparison to other destinations due to its friendly people and superb customer service, along with a quality overall experience.

- Summer visitors, as well as those traveling with kids, are more apt to highly rate Maine for the *variety of activities available*, illustrating the summer options available in Maine for family travel.



Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Domestic visitors are more likely than their Canadian counterparts to rate Maine higher than other destinations on a number of attributes.



Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight visitors are most apt to describe Maine as having beautiful scenery, fresh air, and being a great place to relax and unwind.

- Summer visitors most associate Maine with the descriptors "fresh air" and "great place to escape my daily routine."

Phrases that Best Describe Maine – Top Descriptors

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]	Winter (n=480) [d]	Summer (n=1443) [e]	Fall (n=753) [f]
Beautiful scenery	68%	68%c	74%ac	59%	64%	69%	68%
Fresh air	61%	62%c	67%ac	49%	57%	64%df	58%
Great place to relax and unwind	59%	61%c	63%c	46%	55%	61%d	59%
Clean water (lakes, rivers, ocean)	49%	49%	53%c	43%	47%	51%	48%
Good food/restaurants	48%	50%c	51%c	39%	48%	48%	49%
Great place to escape from my daily routine	48%	49%c	50%c	39%	45%	52%df	41%
Great vacation destination for the whole family	45%	46%c	50%c	34%	40%	47%d	45%
Clean beaches	43%	44%c	46%c	35%	44%	43%	43%
Great summer outdoor recreation activities	42%	41%c	49%c	34%	40%	44%	41%
Unspoiled environment	39%	39%	42%	36%	38%	42%f	34%
Great beaches	37%	39%c	40%c	27%	38%	37%	38%
Lots of wildlife	37%	33%	44%ac	36%	35%	36%	39%
Great value for my money	35%	36%	38%c	30%	38%	33%	37%
Place for a quick getaway	35%	37%c	36%c	25%	38%	33%	37%
Great shopping opportunities	32%	35%c	33%c	20%	34%	30%	35%
Offers many things to do	32%	34%c	33%c	24%	27%	33%d	34%d

Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Phrases that overnight visitors are least likely to associate with Maine include: *too primitive, boring, not enough to do,* and *offers exciting nightlife and entertainment*.

Phrases that Best Describe Maine – Lowest Descriptors

	NET 2013 (n=2675)	Leisure (n=1424) [a]	VFR (n=791) [b]	Business (n=459) [c]	Winter (n=480) [d]	Summer (n=1443) [e]	Fall (n=753) [f]
Romantic getaway	25%	24%	27%	27%	26%	26%	23%
Fine dining	24%	23%	24%	26%	22%	24%	23%
Interesting historic sites	21%	20%	22%	21%	24%e	19%	21%
Great winter outdoor recreation activities	20%	17%	26%a	20%	24%e	16%	24%e
Place I long to go to	18%	19%c	21%c	13%	16%	20%f	15%
High quality lodging	17%	18%	15%	19%	18%	16%	19%
Cold	12%	9%	18%a	13%	15%e	11%	14%
Interesting cultural activities	11%	10%	14%a	10%	11%	11%	12%
Offers exciting nightlife and entertainment	5%	4%	7%a	5%	7%	4%	5%
Not enough to do	3%	2%	4%a	3%	2%	2%	3%
Boring	2%	2%	2%	2%	1%	2%	2%
Too primitive	1%	1%	2%	2%	2%	1%	1%

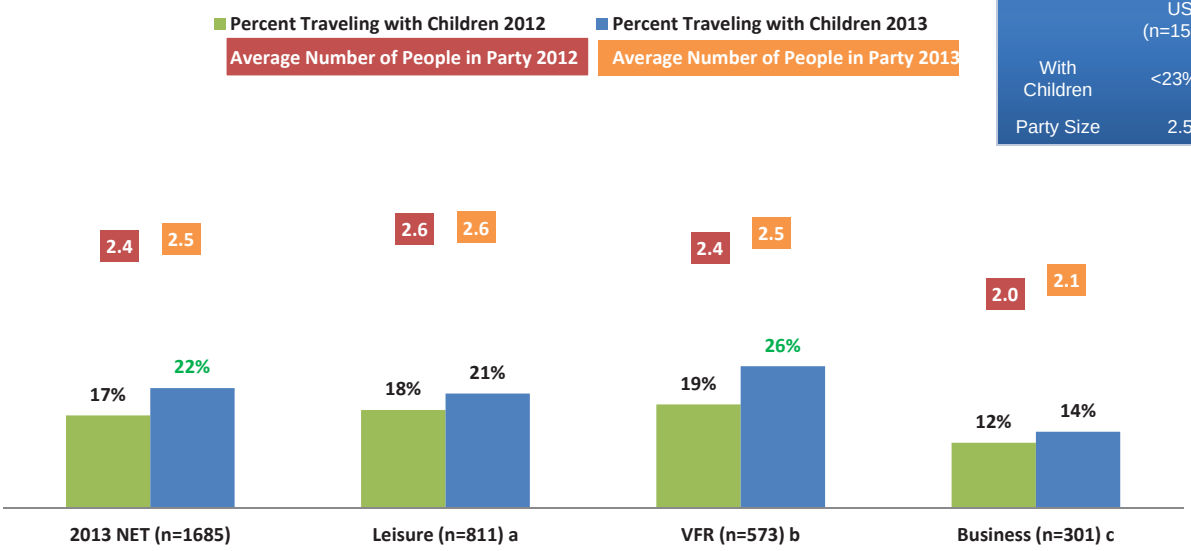
Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitor Travel Logistics

On average, day visitors to Maine traveled in groups of 2-3 people in 2013, with one-fifth traveling with children.

- Similar to overnight visitors, 2013 day visitors showed an increase over 2012 in the proportion traveling with children. This increase was evident in every trip type segment except for business travel.
- Domestic day visitors are more likely to be traveling with children than Canadians (27% versus 13%), and also travel in slightly larger groups (average party size of 2.5 versus 2.2).

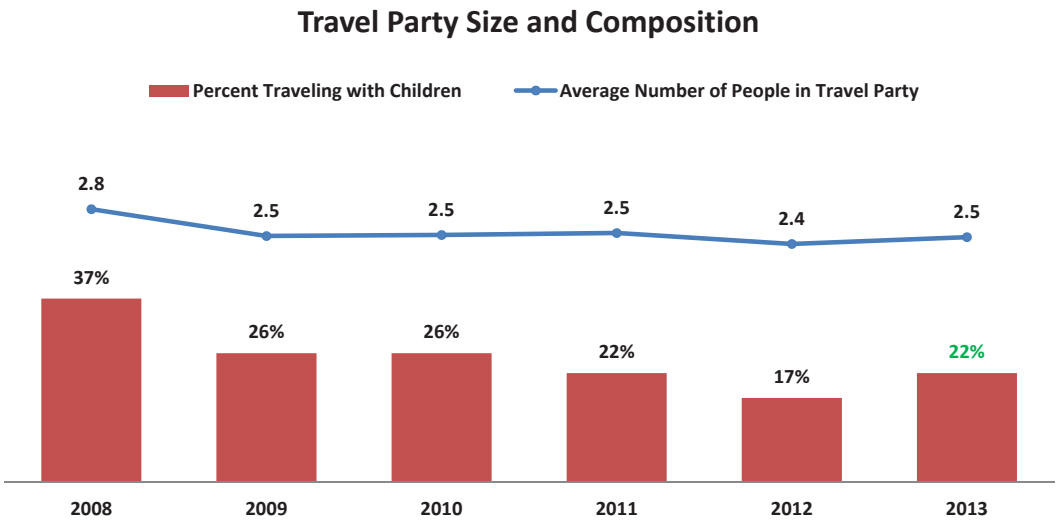
Travel Party Size and Composition



	US (n=1543)	Canada (n=142)
With Children	<23%>	12%
Party Size	2.5	2.2

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

From 2008-2013, the proportion of day visitors traveling with children has fluctuated somewhat, but has remained relatively steady the last three years.



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

Visitor Center usage is fairly low among day visitors, with only one in five stopping at a center while in Maine.

- Marking the southern entry point to Maine, Kittery is the most used Visitor Center among day visitors.
- Business travelers are the most likely to use the Visitor Center located in Hampden North.

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]	Business (n=301) [c]	Winter (n=215) [d]	Summer (n=1167) [e]	Fall (n=303) [f]
Any Visitor Center (NET)	20%	17%	21%	26%a	21%	19%	23%
Kittery	13%	12%	15%	11%	14%	12%	14%
Yarmouth	2%	1%	3%a	3%	3%	2%	3%
West Gardiner	2%	1%	3%a	4%a	2%	3%f	1%
Hampden North	1%	0%	1%	3%	0%	1%	1%
Houlton	2%	1%	1%	4%ab	1%	1%	2%
Calais	1%	1%	2%	1%	1%	1%	2%
Hampden South	1%	1%	0%	2%	0%	1%	1%
Fryeburg	1%	1%	1%	2%	2%	1%	2%
None of the above	80%	83%c	79%	74%	79%	81%	77%

Day Q12a. Once you arrived in Maine did you stop at any of the Maine Visitor Centers?
*Note: Added Summer 2010. **Start Summer 2009.
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Bathroom stops remain the primary reason for a stop at any of the Visitor Centers.

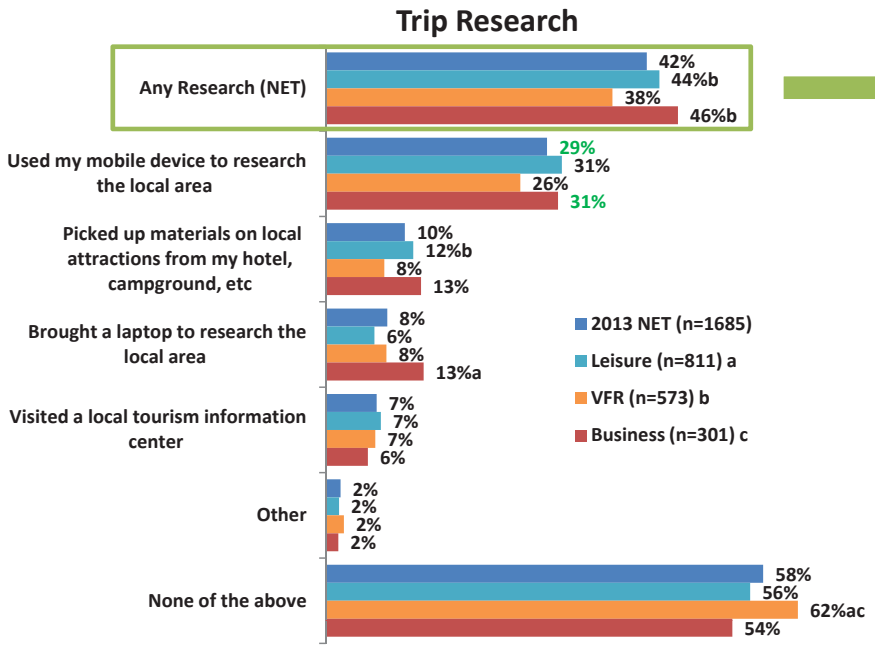
- *Taking a break from driving* and *getting local attraction information* were also common reasons that visitors stopped at the Visitor Centers.

	Leisure (n=136) a	VFR (n=122) b	Business (n=77) c
Any (NET)	99%	96%	99%
Use the bathrooms	76%c	76%	63%
Take a break from driving	51%	60%	61%
Get local attraction information	32%	35%	38%
Get local information from the staff at the Visitor Center	21%	16%	27%
Use the vending area	11%	22%a	18%
Get directions	5%	10%	20%a
Walk your pet	5%	12%a	16%a
Use the picnic area	9%	13%	23%a
Get local lodging information	9%	8%	9%
Other	2%	4%	6%
None of the above	1%	4%ac	1%

Day Q12b. What did you utilize the Maine Visitor Center(s) for during your visit?
Day Q12c. Was there anything specific you were looking for at the Visitor Center that you could not find or wish was provided?
*Base less than 100, use for directional purposes only.
a, b, c indicates significant difference at the 95% confidence level

A significant minority of day visitors continue to research Maine once they arrive in the State.

- 2013 showed an increase over 2012 in the proportion of day visitors who used their mobile device to research the local area once they arrived in Maine.



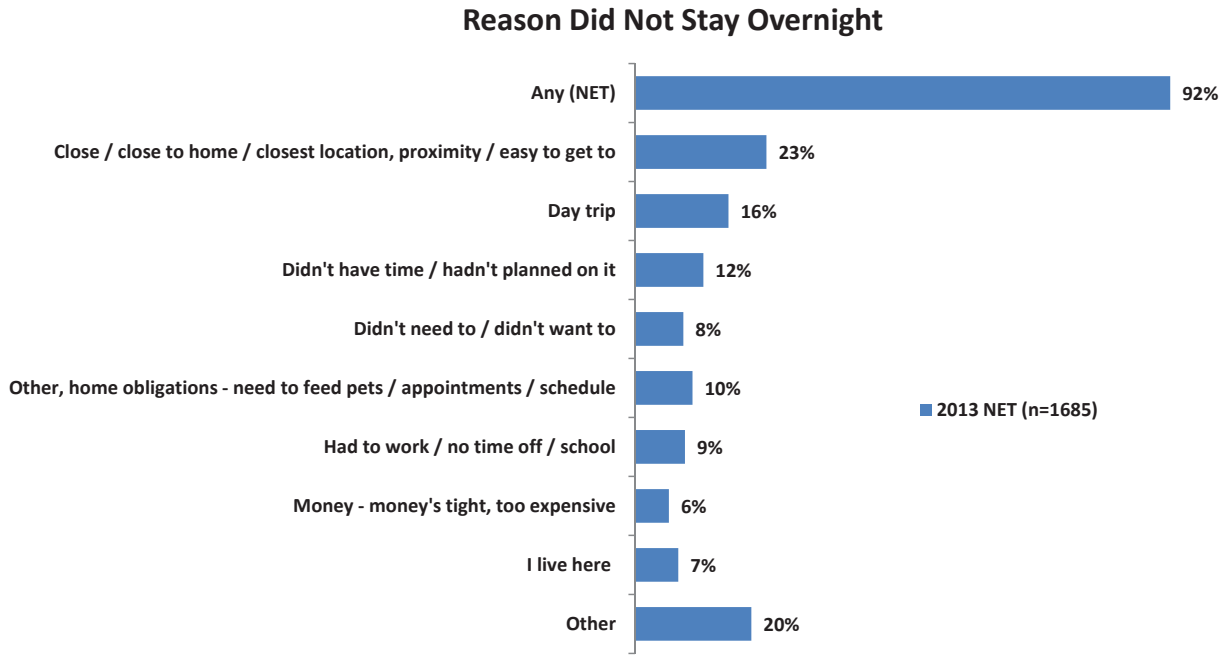
First time visitors, visitors **from the US**, visitors **with children**, **younger** visitors, and visitors **with incomes greater than $75,000** are all more likely than their counterparts to continue researching Maine while visiting.

1st time	Repeat
<68%>	41%
US	**Canada**
<44%>	29%
Have Kids	**No Kids**
<50%>	40%
<$75,000	**$75,000+**
37%	<46%>

18-34 a	35-44 b	44-54 c	55+ d
54%cd	45%d	42%	36%

Day Q12d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine's proximity to home, and the fact that they had only planned on visiting for the day, were among the most cited reasons day visitors did not spend the night in Maine.



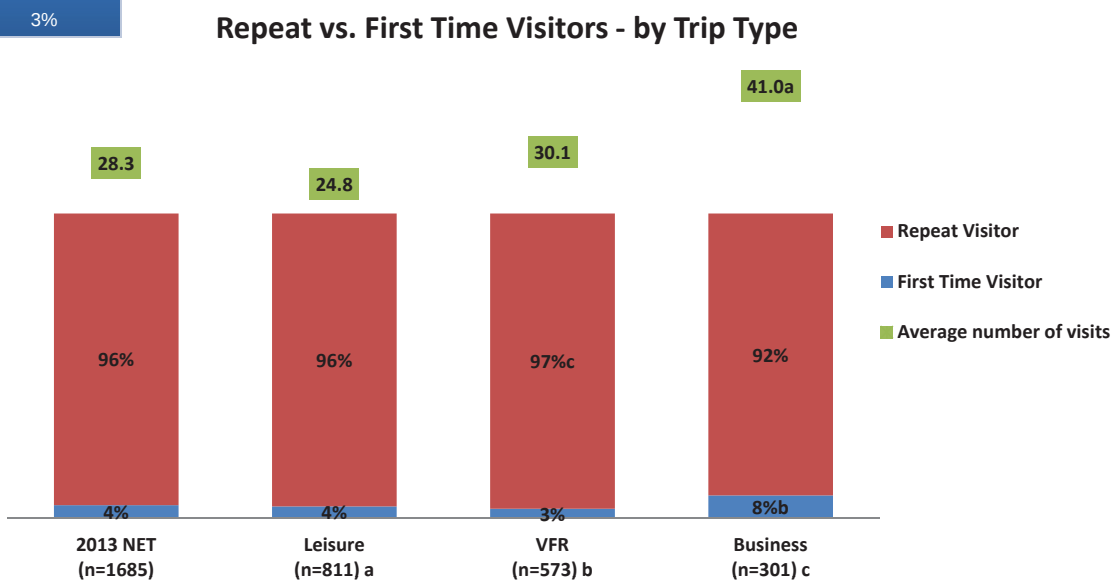
Day Q18. Why didn't you stay overnight at this destination while visiting Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The Maine Day Visitor Experience

Maine day visitors illustrate a strong visitor loyalty, with more than 95% being repeat visitors.

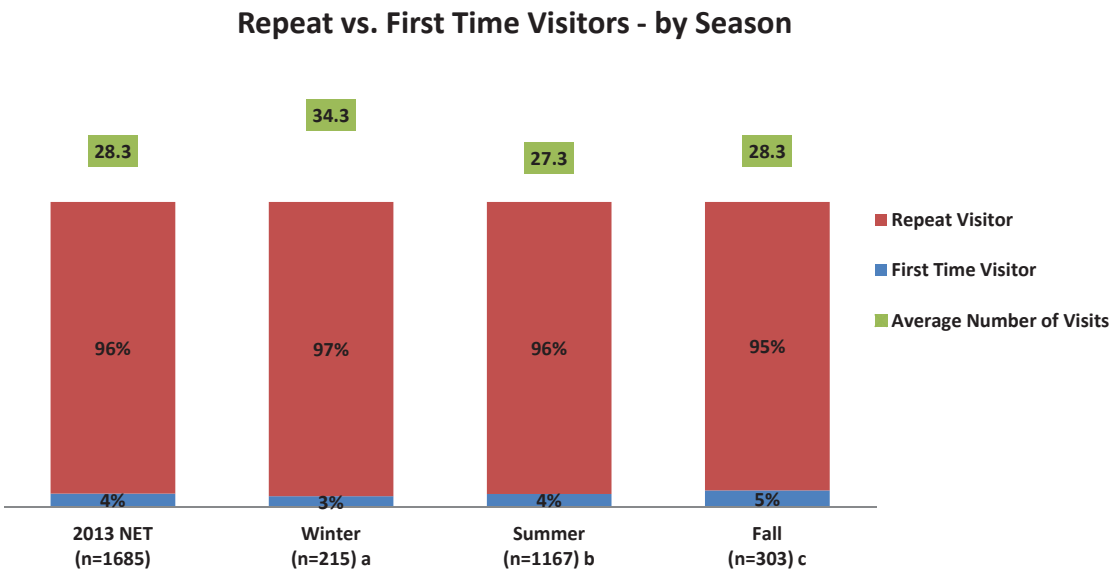
- Younger travelers under the age of 35 are more likely to be visiting Maine for the first time than are those 35 years of age and older (9% versus 3%).

First Time Visitor	
<35 (n=340)	35+ (n=1345)
<9%>	3%



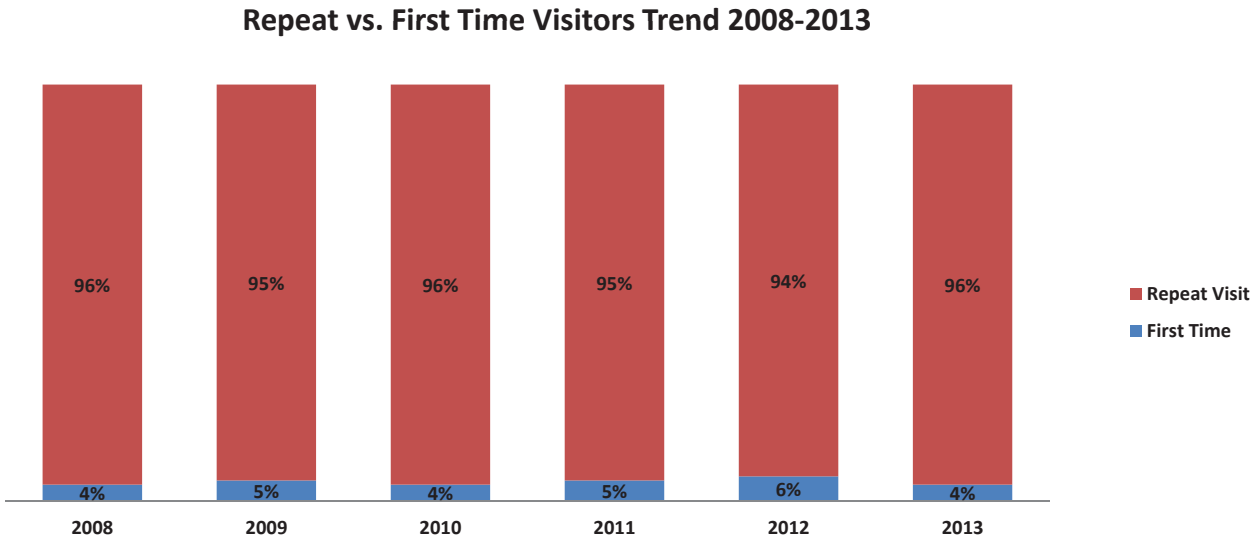
Day Q4. Was this your first trip to Maine? Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years? ** This question was added to the questionnaire in Summer 2012, so no data is available for the Winter 2011/2012 season.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

There is no seasonal variability seen in the proportion of first-time and repeat day visitors to Maine.



Day Q4. Was this your first trip to Maine? Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years? ** This question was added to the questionnaire in Summer 2012, so no data is available for the Winter 2011/2012 season.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Over the past six years, the relative proportion of first-time and repeat day visitors to Maine has not changed.



Day Q4. Was this your first trip to Maine? Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years? ** This question was added to the questionnaire in Summer 2012, so no data is available for the Winter 2011/2012 season.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day visitors are primarily drawn to Maine because of personal ties to the State and its proximity to their home.

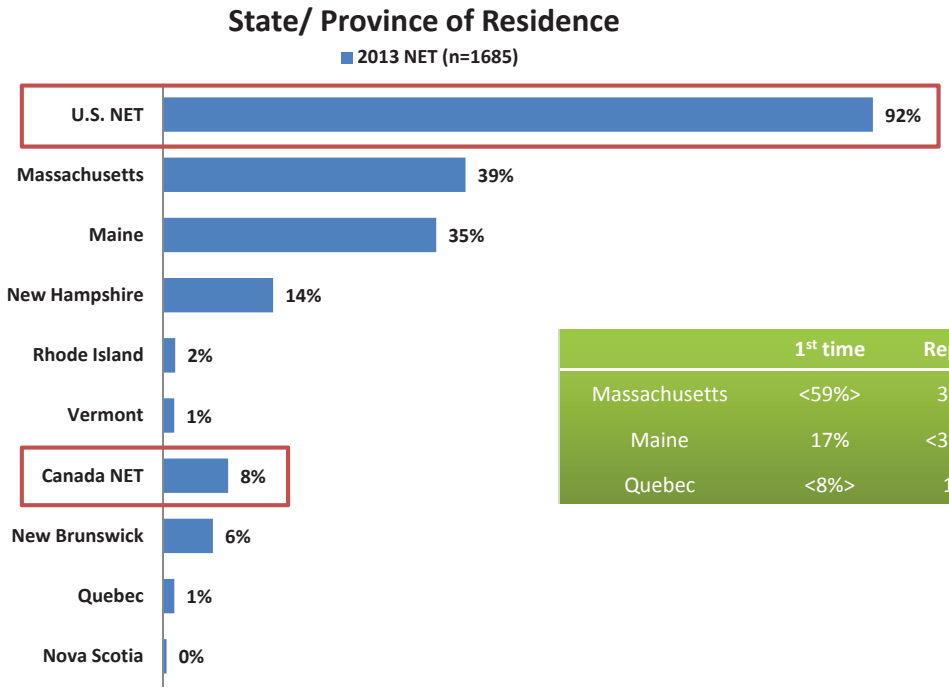
- Maine's beaches/coastal areas and shopping opportunities are also top reasons that day visitors chose to visit Maine.

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]
Any (NET)	80%	98%	98%
Friends, relatives live here / where I'm from / familiar	20%	5%	50%a
I live here / have summer, 2nd home / timeshare	14%	14%	23%a
Close / close to home / closest location / proximity / easy to get to	14%	24%b	7%
Beaches / ocean / lakes / coast	12%	19%b	8%
Shopping - outlet shopping, mall	11%	20%b	5%
Good food / good seafood	6%	9%b	4%
Scenery / ocean views / foliage	6%	8%b	5%
Love the state, city, area / like it there / enjoy it	5%	7%	5%
Beautiful - scenery, beaches / natural beauty	5%	6%	6%
Good attractions / museums / zoo / craft fairs / events	3%	6%b	2%
Specific outdoor activities - canoeing, boating, camping, fishing, golf	3%	5%b	2%
Relaxing atmosphere / easy to travel in	3%	5%b	2%
Mountains / nature / wildlife	2%	3%	2%
Things to do - not specific	2%	3%	2%
Unique place / diverse state / new things to explore / never visited before / haven't been for a while	2%	2%	1%
Other	3%	4%	3%
None / nothing / na	1%	1%	1%
No Answer	19%	1%	1%

Day Q6. Thinking about all the places you could have chosen to visit for this specific trip, why did you choose Maine?
*Not asked of Business Travelers.
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Massachusetts and Quebec are more likely to send first-time day visitors to Maine, while in-state day visitors are logically more likely to be repeat visitors.



	1st time	Repeat
Massachusetts	<59%>	38%
Maine	17%	<36%>
Quebec	<8%>	1%

Q1A. In what State or Province do you reside?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

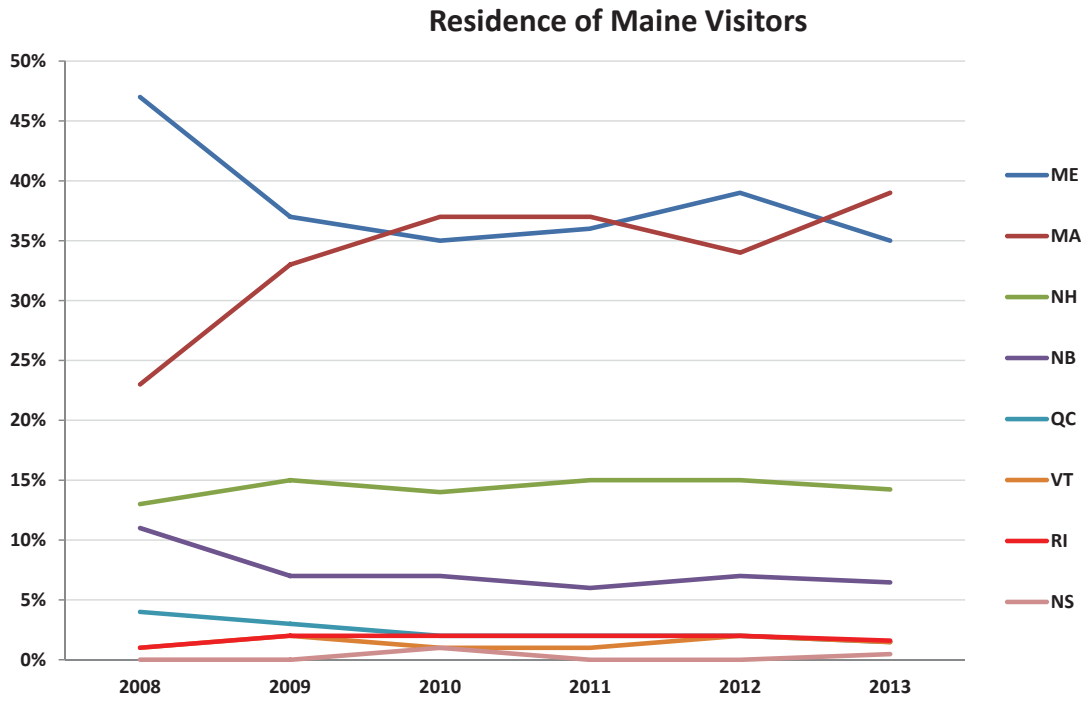
Day visitors from New Brunswick are most likely to be visiting Maine for leisure travel and visiting during the winter months.

- Massachusetts sends a higher proportion of leisure and VFR day visitors to Maine, while in-state day visitors are more likely to be traveling for business.

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]	Business (n=301) [c]	Winter (n=215) [d]	Summer (n=1167) [e]	Fall (n=303) [f]
U.S. NET	92%	87%	97%ac	93%a	89%	92%	91%
Massachusetts	39%	44%c	39%c	24%	36%	40%	37%
Maine	35%	26%	38%a	55%ab	37%	35%	36%
New Hampshire	14%	14%	16%	12%	14%	14%	14%
Rhode Island	2%	1%	2%	1%	1%	2%	2%
Vermont	1%	2%c	1%	0%	1%	2%	2%
Canada NET	8%	13%bc	3%	7%b	11%	8%	9%
New Brunswick	6%	12%bc	2%	2%	10%ef	6%	6%
Quebec	1%	1%	1%	4%ab	1%	1%	3%e
Nova Scotia	0%	0%	1%	1%	-	1%	0%

Q1A. In what State or Province do you reside?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The proportion of day visitors from Maine's neighboring states and provinces has been relatively stable over the years, with some shifts seen between in-state visitors and those from Massachusetts.



Q1A. In what State or Province do you reside?
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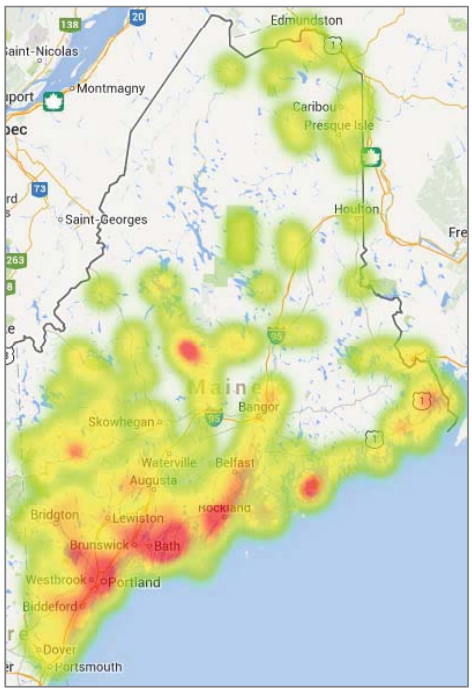
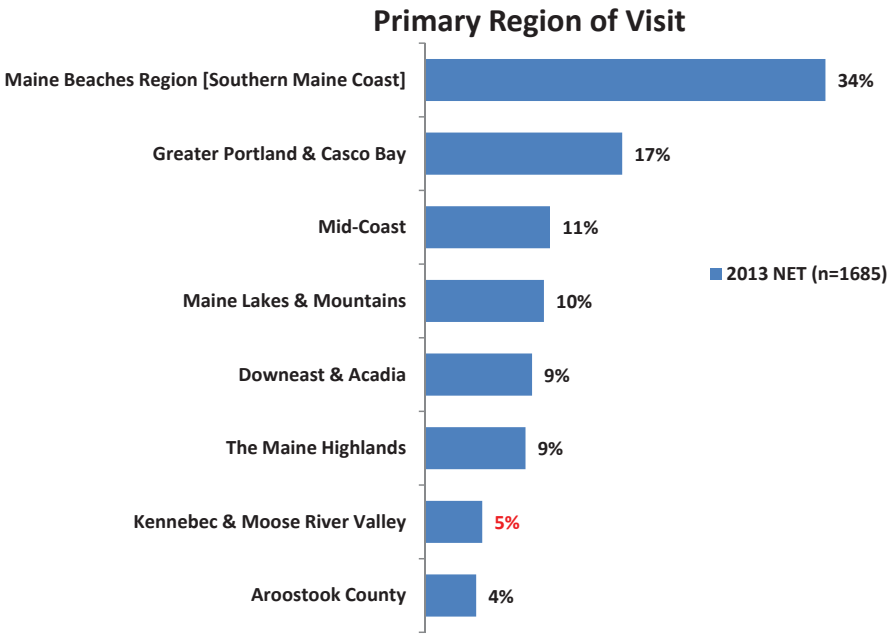
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day visitation centers around the Maine Beaches and Greater Portland/Casco Bay regions.

- The Maine Highlands attracted a higher proportion of day visitors who have children than who don't have children (12% versus 7%).

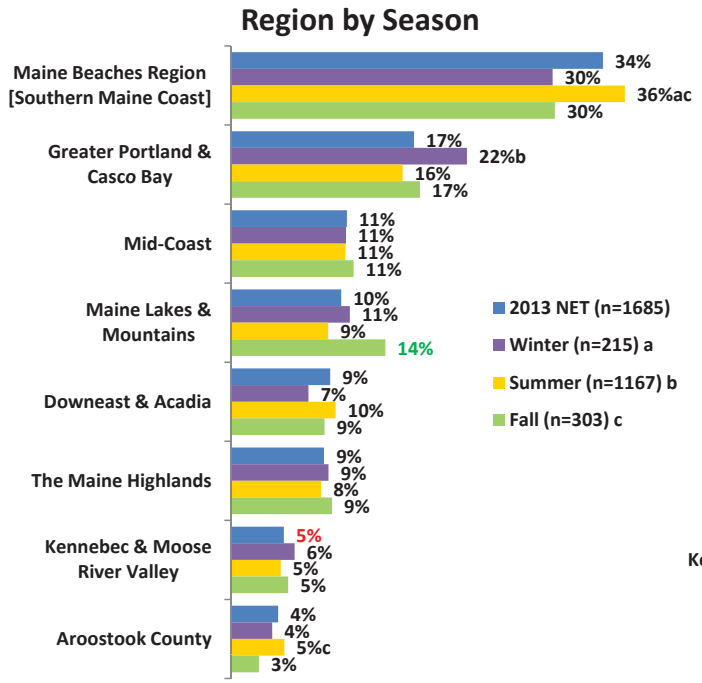


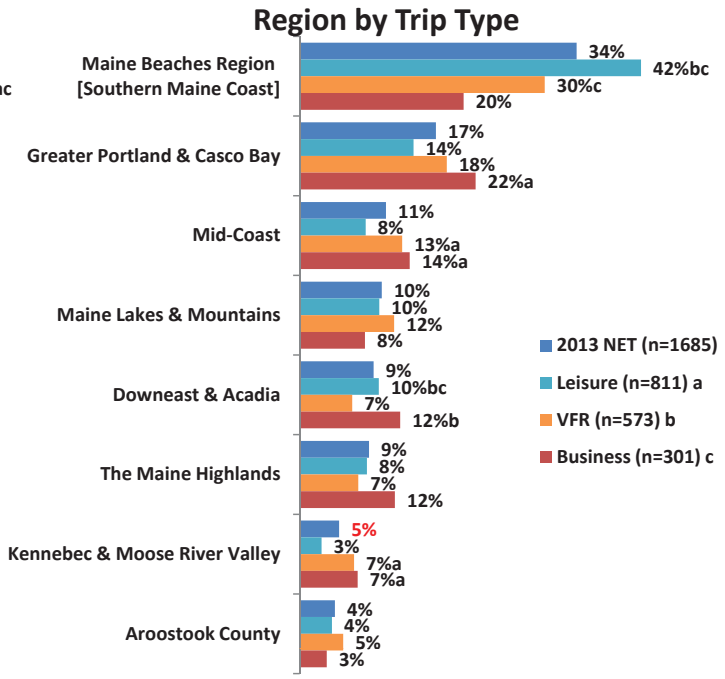


Day Q11. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Very little seasonal variation was seen in the primary regions visited, with the exception of summer day visitors being more likely to visit the Maine Beaches Region than winter or fall visitors.

- Day visitors on a leisure trip are more likely to visit the Maine Beaches region or the Downeast/Acadia region. Leisure travelers are less likely to be visiting the Mid-Coast or Kennebec & Moose River Valley regions.

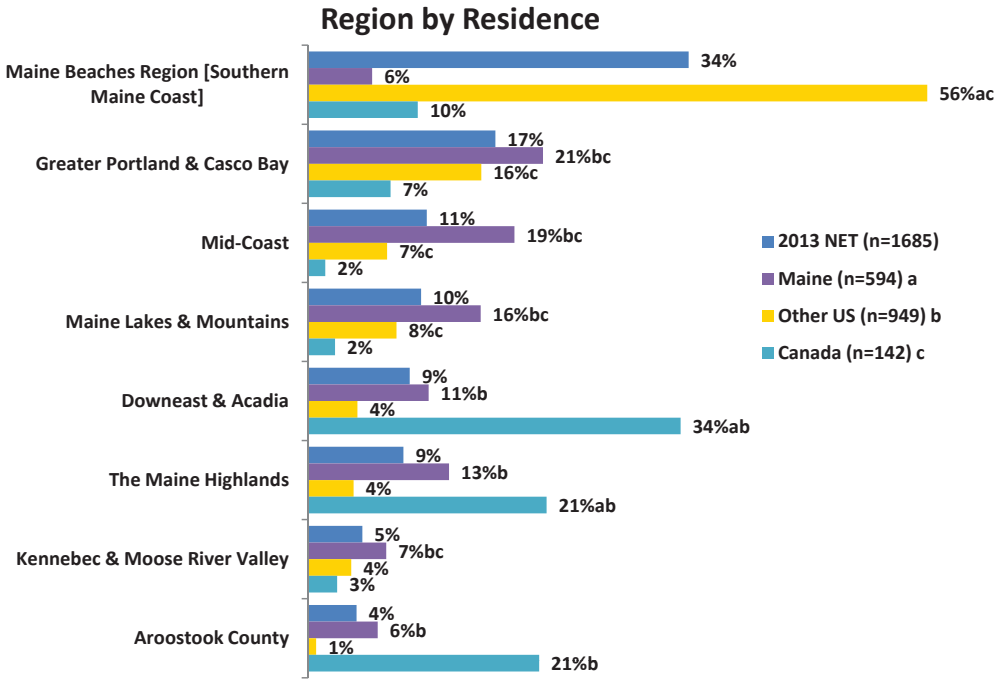




Day Q11. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Domestic and Canadian visitation is driven to different regions in Maine.

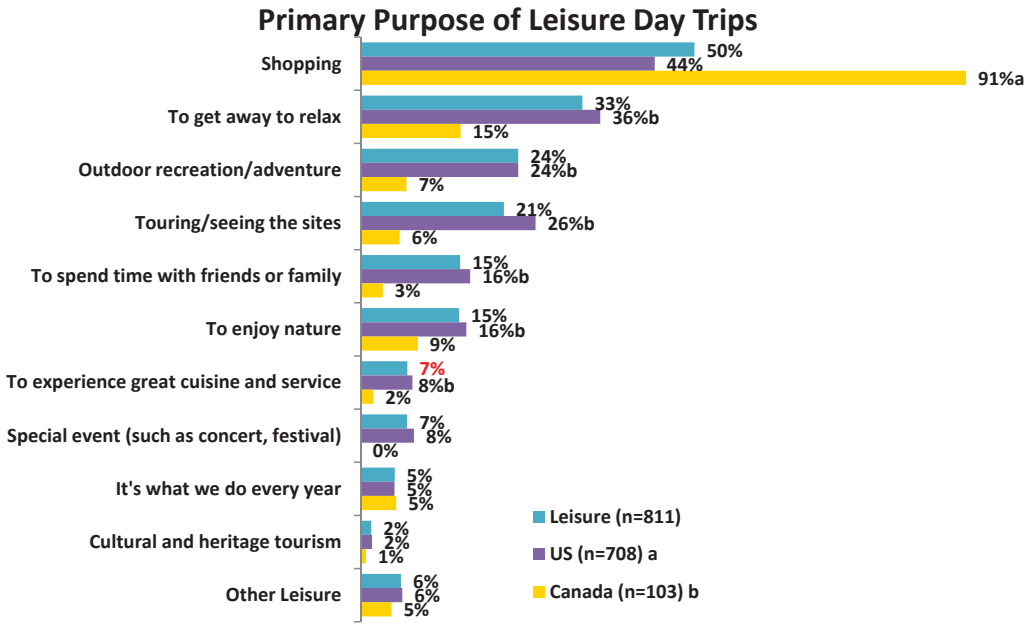
- As expected, Canadian day visitation is stronger in two of the regions bordering Canada – the Downeast & Acadia region and Aroostook County.



Day Q11. What region in Maine was your primary destination?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

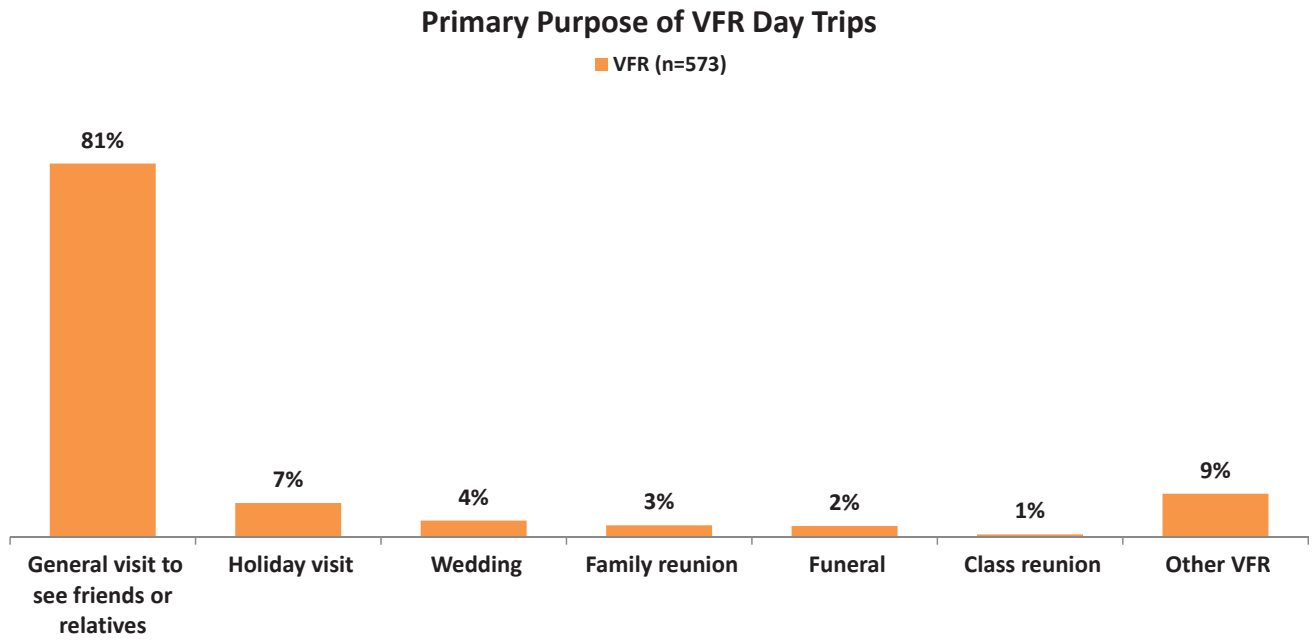
Shopping remains the primary draw to Maine among leisure day visitors, especially Canadian visitors.

- Nine in ten Canadian day leisure visitors came to Maine primarily to shop, as compared to 44% of domestic visitors.
- Domestic day leisure visitors were more likely than Canadian visitors to visit for a number of other reasons, as seen in the chart below.



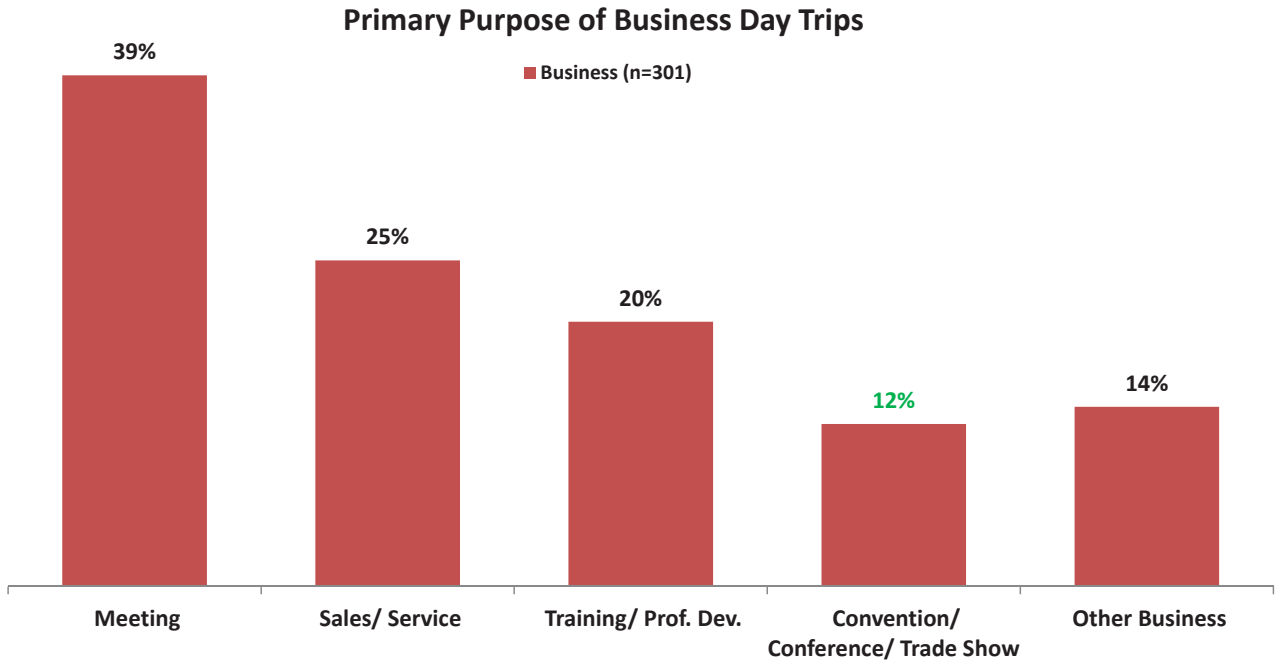
Day Q3. What was the primary purpose of your most recent leisure day trip in Maine?
**Asked in 2012 only. Due to revisions during 2012 in the answer options, direct comparisons between the 2011 and 2012 data can not be made.*
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The vast majority of VFR day trips to Maine were for a general visit to see friends/relatives.



Day Q3. What was the primary purpose of your most recent day trip to visit friends or relatives in Maine?
a, b, c indicates significant difference at the 95% confidence level

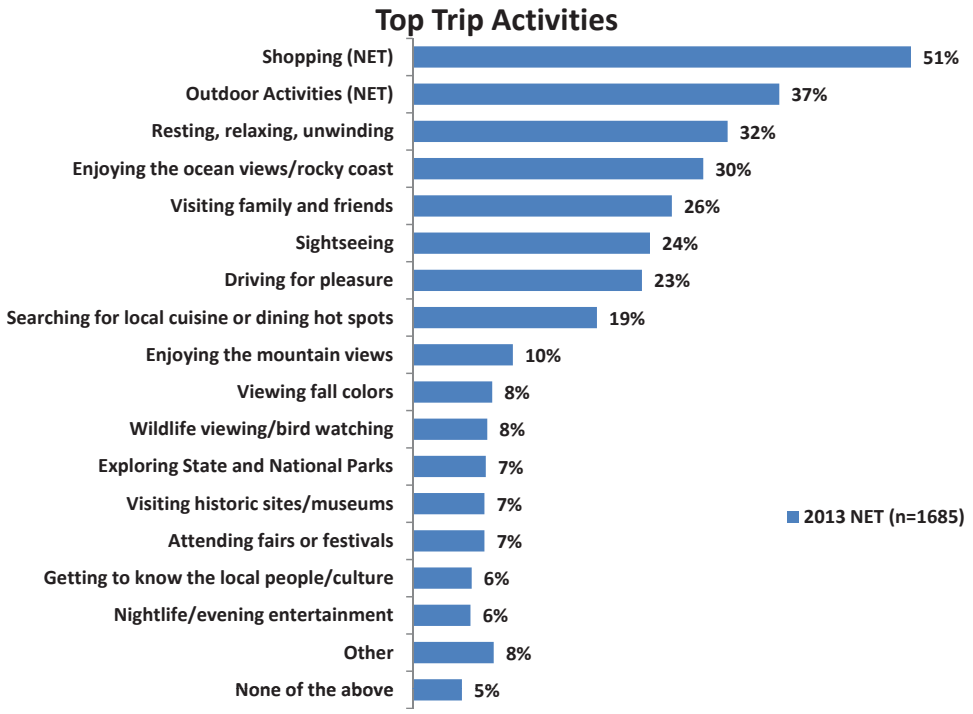
General meetings were the primary draw for business day travel to Maine, followed by sales/service.



Day Q3. What was the primary purpose of your most recent business day trip in Maine?
a, b, c indicates significant difference at the 95% confidence level
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Various shopping and outdoor activities are the most popular activities among day visitors to Maine.

- More passive activities such as *resting, relaxing, unwinding* and *enjoying the ocean views/rocky coast* are the next most popular among day visitors.



Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Seasonal variations can be seen in the activities pursued by day visitors.

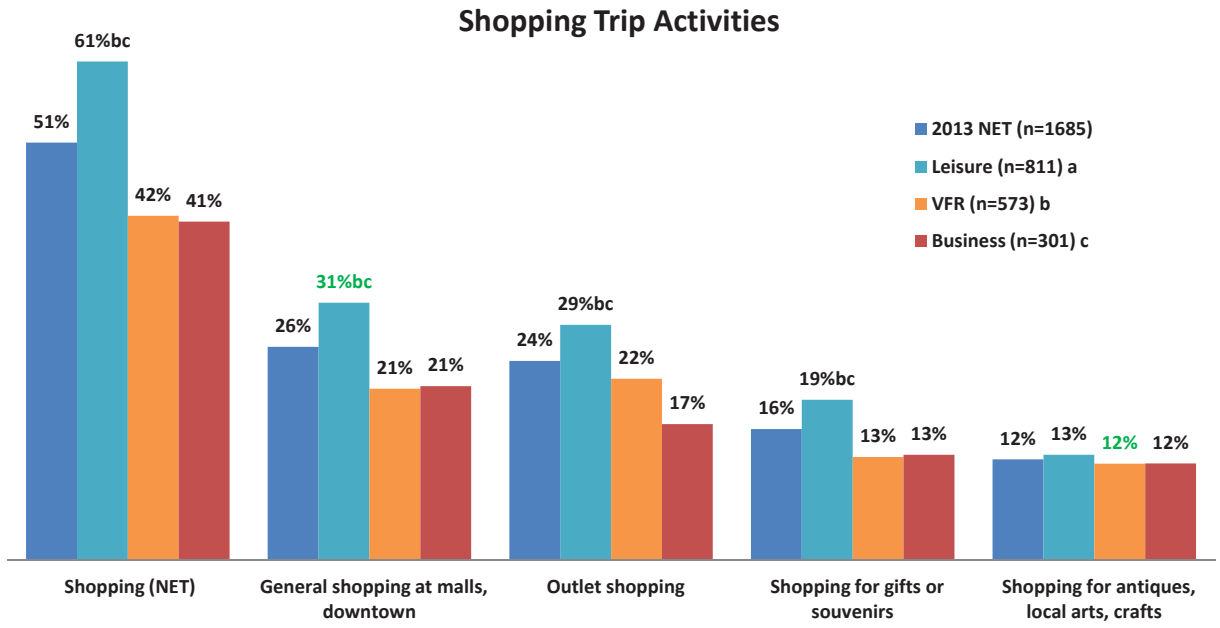
- Shopping is more common among winter day visitors than summer or fall visitors, while outdoor activities, R&R, and enjoying the ocean views/rocky coast are more common among summer visitors. As expected, fall day visitors are more likely to be viewing fall colors and attending fairs or festivals.

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]	Business (n=301) [c]	Winter (n=215) [d]	Summer (n=1167) [e]	Fall (n=303) [f]
Shopping (NET)	51%	61%bc	42%	41%	58%ef	50%	50%
Outdoor Activities (NET)	37%	39%c	40%c	28%	26%	42%ac	29%
Resting, relaxing, unwinding	32%	34%bc	35%c	20%	25%	34%ac	29%
Enjoying the ocean views/rocky coast	30%	34%c	28%c	20%	26%	32%ac	24%
Visiting family and friends	26%	8%	56%ac	18%a	25%	27%	26%
Sightseeing	24%	28%bc	22%	19%	18%	26%a	23%
Driving for pleasure	23%	27%bc	22%	16%	22%	25%c	19%
Searching for local cuisine or dining hot spots	19%	23%b	14%	17%	18%	19%	20%
Enjoying the mountain views	10%	11%	10%	10%	8%	10%	13%a
Viewing fall colors	8%	8%	9%	8%	5%	4%	24%ab
Wildlife viewing/bird watching	8%	7%	7%	9%	7%	8%	6%
Exploring State and National Parks	7%	8%	8%	5%	5%	8%a	8%a
Visiting historic sites/museums	7%	7%	8%	7%	6%	7%	7%
Attending fairs or festivals	7%	7%	9%	6%	3%	7%a	12%ab
Getting to know the local people/culture	6%	6%	6%	6%	4%	7%c	4%
Nightlife/evening entertainment	6%	3%	8%a	8%a	4%	6%	6%
Other	8%	10%b	5%	10%	9%	8%	7%
None of the above	5%	1%	5%a	14%ab	6%	5%	4%

Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

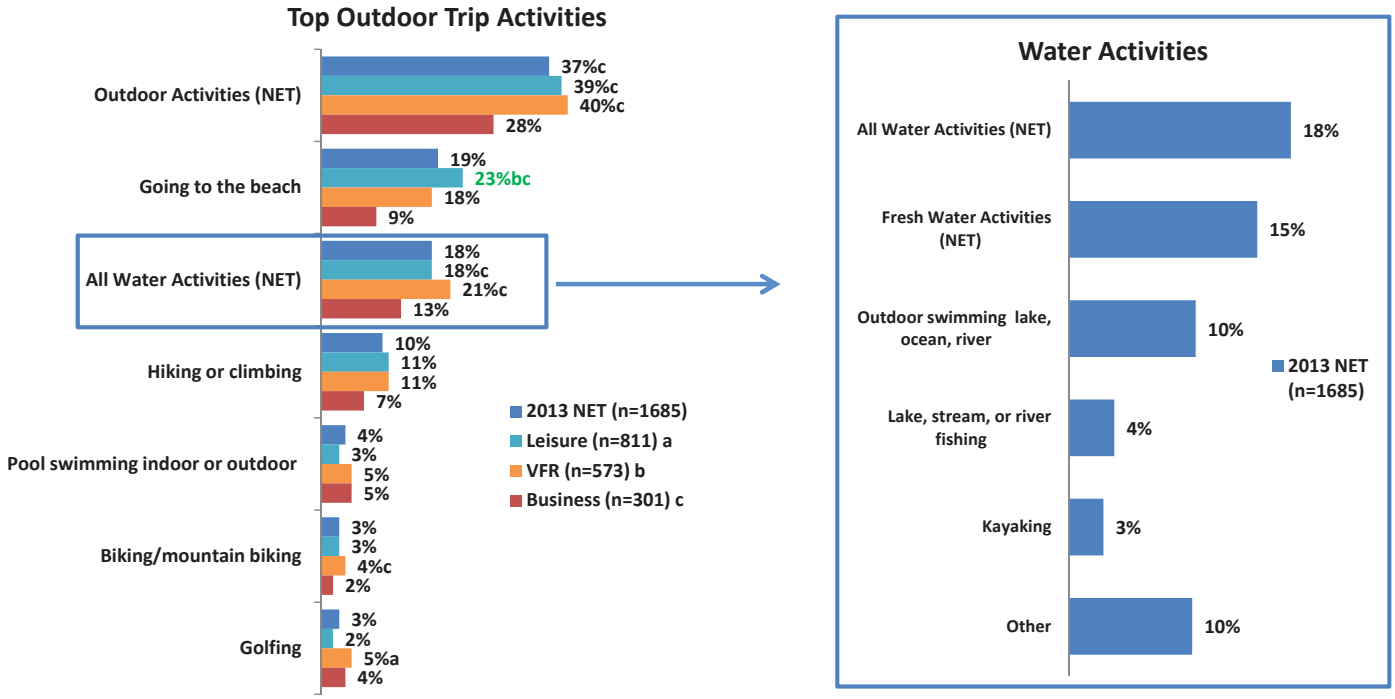
Reported levels of shopping were consistently higher among leisure day visitors.

- General shopping at malls/downtown and outlet shopping were among the most widely pursued shopping activities among day visitors.



Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply)
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

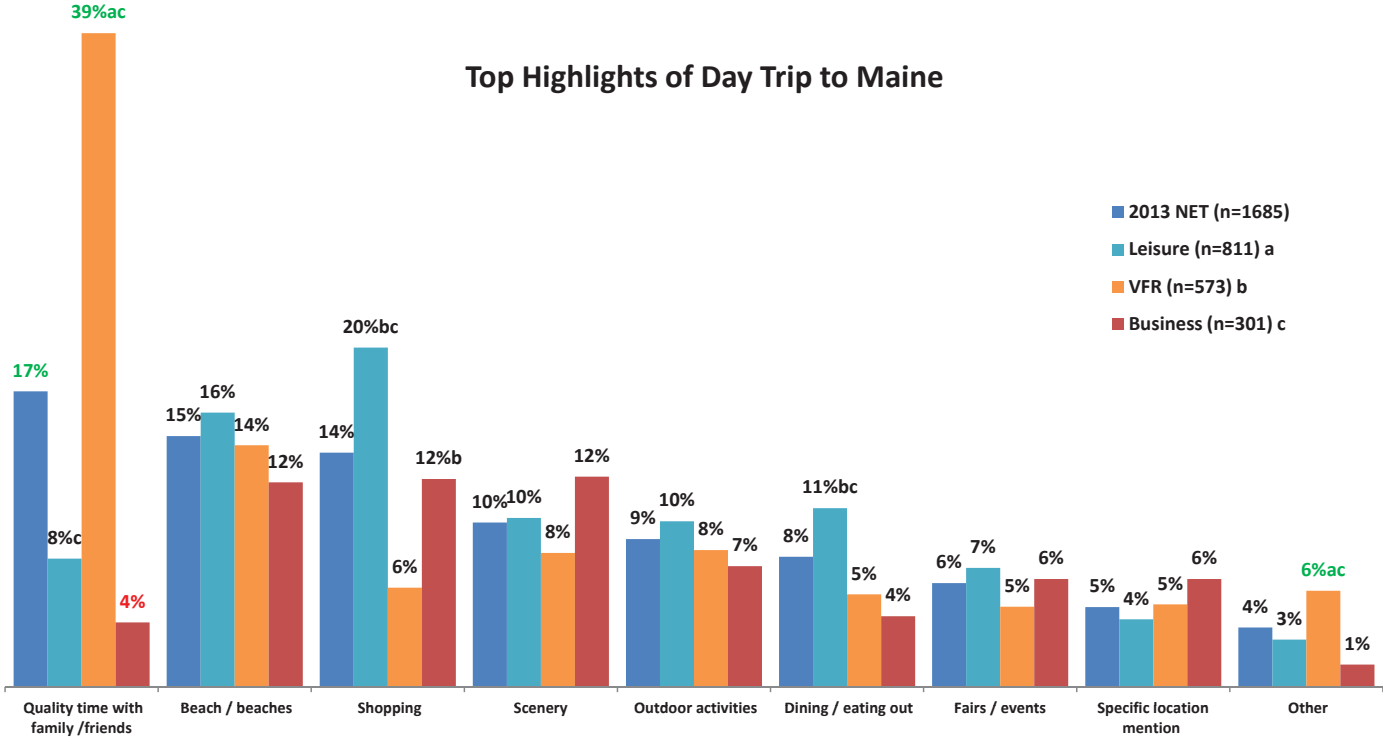
Day visitors' outdoor trip activities centered around going to the beach and other water activities.



Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply)
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

People, beaches/lakes, and shopping highlight day visitors' trips to Maine.

- After experiencing a drop between 2011 and 2012, the percentage of day visitors citing *quality time with family/friends* as the highlight of their trip increased in 2013 back to the levels seen in prior years.



Day Q16. What was the highlight of your day trip in Maine?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Like overnight visitors, day visitors' top complaints about their trip center around wanting more time to spend here and poor weather.

- *Better weather* was cited by a greater proportion of day visitors in 2013 than in 2012 (13% versus 9%), as was *better dining/more restaurants/bars* (7% versus 5%).
- Summer travelers were the most likely to list something that could have been better on their trip (67% versus 59% of winter travelers and 60% of fall travelers). Business travelers were more likely than leisure or VFR travelers to complain about dining/restaurants/bars (11% versus 6% each of leisure and VFR travelers).

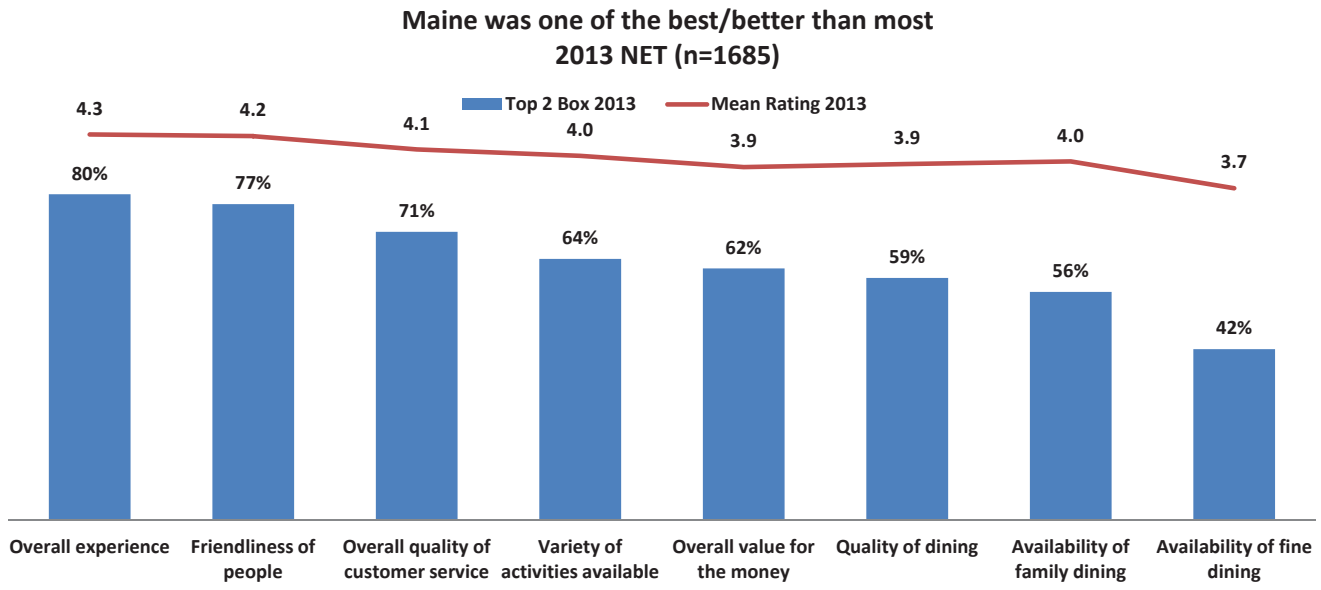
Top Aspects That Could Have Been Better on Day Trip in Maine - By Trip Type & Season

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]	Business (n=301) [c]	Winter (n=215) [d]	Summer (n=1167) [e]	Fall (n=303) [f]
Any (NET)	65%	64%	67%	62%	59%	67%df	60%
More time to spend	14%	12%	16%	18%a	12%	15%	12%
Better weather / less rain	13%	12%	15%c	9%	16%	12%	12%
Not much / everything was great	7%	8%c	7%	4%	5%	8%	5%
Better dining / more restaurants / bars	7%	6%	6%	11%ab	7%	7%	7%
Less traffic	5%	7%b	4%	4%	2%	6%d	4%
Parking - limited, to far away, need free / crowded parking lot	2%	2%	2%	1%	1%	2%d	2%
Lower taxes, tolls	2%	2%	3%c	1%	2%	2%	1%
Shopping - more outlets, better deals, longer hours	2%	3%	1%	1%	2%	2%	3%
Road mentions - construction, condition	2%	2%	1%	2%	1%	2%	1%
Cheaper fuel / gas prices	2%	1%	2%	1%	1%	2%	2%
Cheaper prices - not specific	1%	1%	1%	1%	3%ef	1%	1%
Less driving time	1%	1%	2%c	0%	1%	1%	1%
More money to spend	1%	1%	1%	1%		1%	1%
Crowds	1%	1%	1%	1%	0%	1%	1%
More to do	1%	1%	1%	1%	0%	1%	2%de
Lodging accommodations - cheaper, availability, need updating	1%	1%	0%	1%	1%	0%	1%
Other	5%	5%	6%	5%	4%	6%	5%
None / nothing	24%	24%	24%	22%	31%e	21%	28%e
No Answer	11%	10%	10%	15%	10%	11%	11%

Day Q17. What do you wish could have been better?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

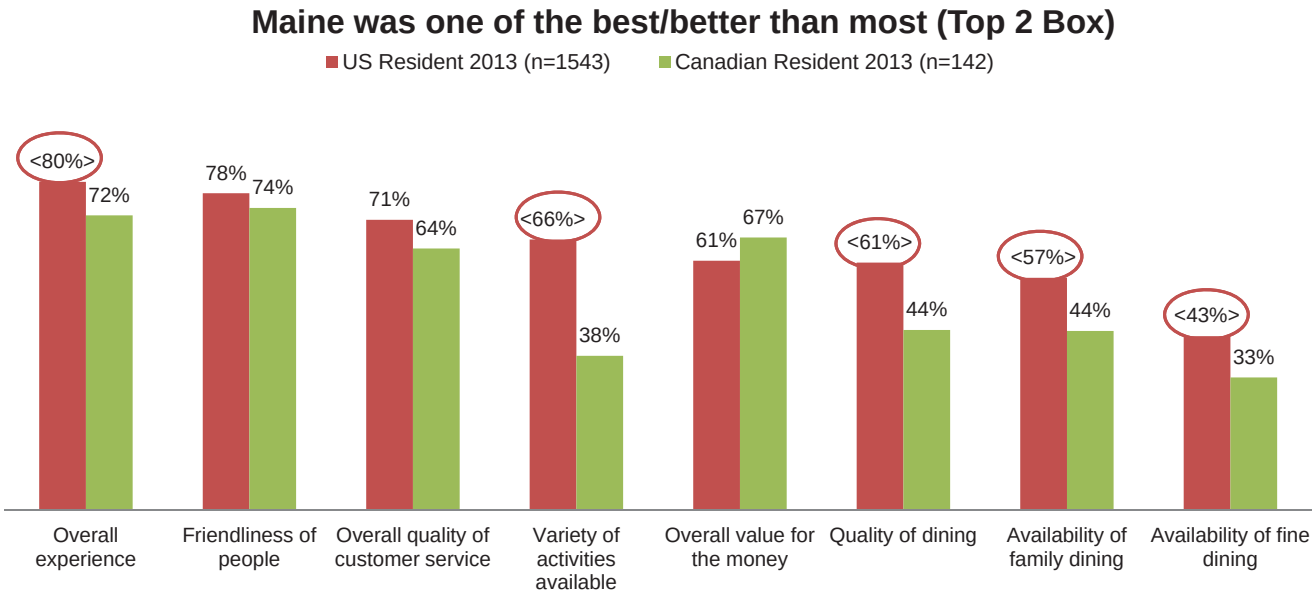
Maine continues to shine as a day trip destination due to its friendly people and superb customer service, along with a quality overall experience.

- Day visitors 55 years of age and older gave Maine higher ratings for its *availability of fine dining* than their younger counterparts (mean rating of 3.8 versus 3.6).



Q13. Using the scale provided in the table below, please evaluate your day trip in Maine as compared to other destinations you've visited.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Domestic day visitors are more likely than their Canadian counterparts to rate Maine higher than other destinations on a number of attributes.



Q13. Using the scale provided in the table below, please evaluate your day trip in Maine as compared to other destinations you've visited.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Just like overnight visitors, Maine day visitors are most apt to describe Maine as having beautiful scenery, fresh air, and being a great place to relax and unwind.

- Leisure visitors are most likely to find Maine best described by the phrase *place for a quick getaway* (62% versus 55% among VFR travelers and 50% among business travelers).

Phrases that Best Describe Maine – Top Descriptors

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]	Business (n=301) [c]	Winter (n=215) [d]	Summer (n=1167) [e]	Fall (n=303) [f]
Beautiful scenery	77%	77%c	79%c	70%	74%	78%f	73%
Fresh air	70%	68%	75%ac	63%	69%	71%	66%
Great place to relax and unwind	68%	68%	69%	63%	67%	68%	67%
Clean water (lakes, rivers, ocean)	59%	55%	63%a	62%	58%	60%	56%
Good food/restaurants	59%	60%	59%	55%	59%	59%	57%
Place for a quick getaway	57%	62%bc	55%	50%	61%f	59%f	50%
Great summer outdoor recreation activities	56%	53%	61%a	57%	53%	58%f	52%
Great place to escape from my daily routine	53%	55%	51%	50%	52%	54%	50%
Clean beaches	53%	53%	55%	48%	49%	54%	51%
Great vacation destination for the whole family	52%	50%	55%	52%	54%	52%	50%

Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Similar to their ratings of Maine in comparison to other destinations, domestic visitors are more likely than Canadians to cite numerous phrases as vacation descriptors of Maine.

Phrases that Best Describe Maine – Top Descriptors

	NET 2013 (n=1685)	US (n=1543) [a]	Canada (n=142) [b]	First Time Visitor (n=73) [c]	Repeat Visitor (n=1612) [d]
Beautiful scenery	77%	79%b	49%	68%	77%
Fresh air	70%	72%b	45%	66%	70%
Great place to relax and unwind	68%	70%b	40%	52%	68%c
Clean water (lakes, rivers, ocean)	59%	62%b	27%	26%	60%c
Good food/restaurants	59%	60%b	51%	50%	59%
Place for a quick getaway	57%	58%b	45%	42%	58%c
Great summer outdoor recreation activities	56%	60%b	17%	41%	57%c
Great place to escape from my daily routine	53%	54%b	35%	49%	53%
Clean beaches	53%	55%b	24%	37%	53%c
Great vacation destination for the whole family	52%	54%b	32%	40%	53%c

Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Phrases that day visitors are least likely to associate with Maine include: *too primitive, boring,* and *not enough to do*.

Phrases that Best Describe Maine – Lowest Descriptors

	NET 2013 (n=1685)	Leisure (n=811) [a]	VFR (n=573) [b]	Business (n=301) [c]	Winter (n=215) [d]	Summer (n=1167) [e]	Fall (n=303) [f]
Great beaches	48%	50%c	49%	42%	44%	50%d	46%
Great shopping opportunities	45%	52%bc	40%	36%	43%	46%	42%
Unspoiled environment	43%	42%	45%	45%	43%	44%	43%
Lots of wildlife	42%	37%	47%a	44%	44%	40%	45%
Great value for my money	41%	43%	39%	39%	45%	41%	39%
Offers many things to do	40%	38%	43%	43%	38%	42%	36%
Great winter outdoor recreation activities	32%	29%	33%	36%	37%e	30%	33%
Interesting historic sites	27%	22%	32%a	31%a	28%	26%	30%
Romantic getaway	26%	25%	26%	29%	26%	26%	26%
Fine dining	23%	22%	22%	27%	25%	22%	24%
Place I long to go to	21%	20%	22%	23%	21%	22%	21%
High quality lodging	16%	15%	16%	21%	18%	16%	17%
Interesting cultural activities	16%	13%	18%a	22%a	19%	16%	16%
Cold	11%	10%	12%	15%a	18%ef	10%	13%e
Offers exciting nightlife and entertainment	6%	6%	7%	7%	6%	7%	5%
Not enough to do	2%	1%	3%	3%	2%	2%	3%
Boring	1%	1%	1%	1%	2%e	0%	2%e
Too primitive	0%	0%	1%a	0%	0%	0%	1%

Day Q15. From the list below, please select the phrases that you feel best describe Maine as a vacation destination.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Key Visitor Metrics

Overnight visitor spending averaged just under $1,000 per travel party, with lodging and food expenses making up the highest proportions of spending.

- Visitor spending in 2013 was higher than in 2012, particularly in lodging, retail goods, and recreation.
- Leisure travelers spent the highest amounts of money while visiting Maine, followed by business travelers. Those visiting friends and relatives spent less.

Overnight Visitor Spending

2013 Overnight Travel Spending	2012 Total (n=2497)	2013 Total (n=2675)	2013 Leisure (n=1424) (a)	2013 VFR (n=791) (b)	2013 Business (n=459) (c)
Total Net Spending (Mean)**	**$856.59**	**$984.40**	**$1,126.24**	**$763.39**	**$925.74**
Lodging (Median*)	$200	$250	$300	$90	$280
Transportation (Median*)	$100	$100	$100	$100	$80
Food (Median*)	$200	$200	$230	$180	$175
Retail Goods (Mean**)	$136.28	$147.18	$180.17	$104.97	$117.62
Recreation (Mean**)	$30.72	$41.13	$46.18	$38.46	$30.10

**Medians include zero without outliers*
*** Means including zero without outliers*
#VFR Spending is reported using the mean including zero without outliers because over half of VFR visitors reported spending $0 on lodging.

Regional Q33. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day visitor spending averaged just over $300 per travel party, with the highest percentage being spent on retail goods.

- Differing from overnight visitors, business day travelers spent the highest amounts in Maine, followed by leisure travelers.

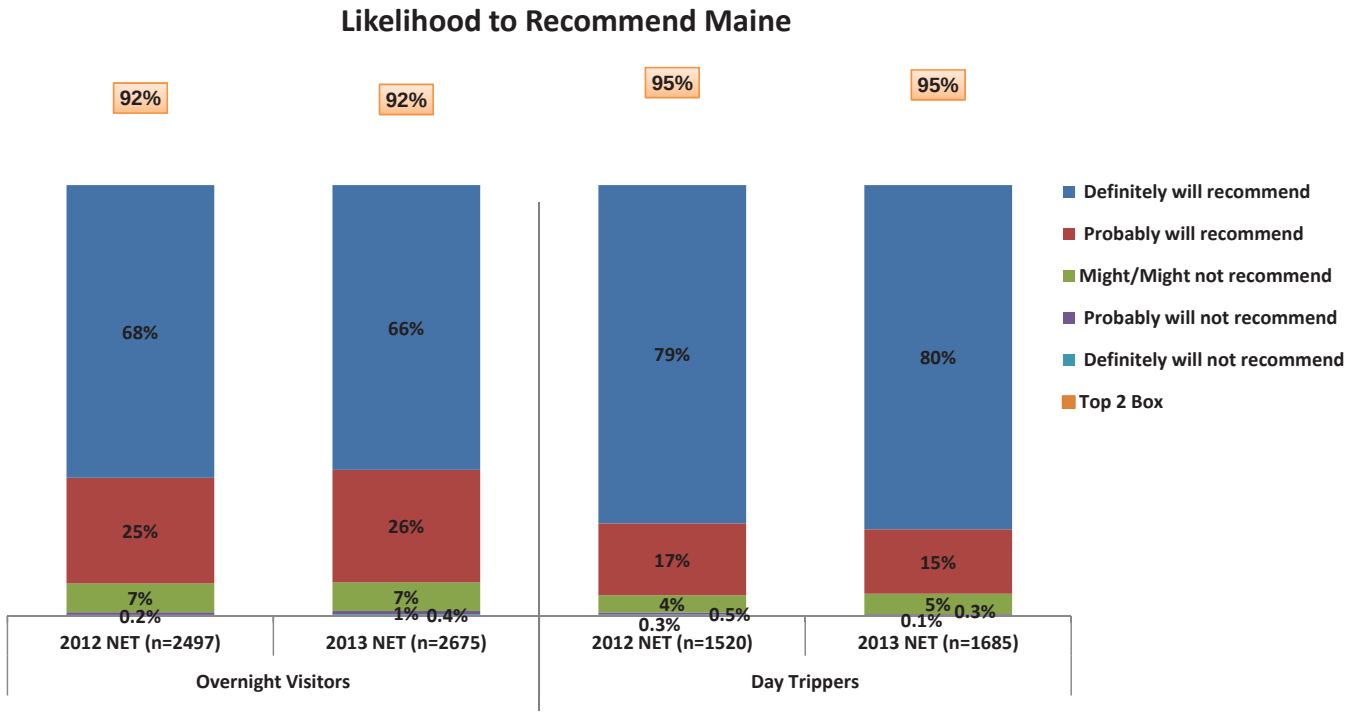
Day Visitor Spending

2013 Day Travel Spending	2012 Total (n=1520)	2013 Total (n=1685)	2013 Leisure (n=811) (a)	2013 VFR (n=573) (b)	2013 Business (n=301) (c)
Net Spending (Mean)**	**$287.70**	**$305.29**	**$306.07**	**$296.36**	**$320.18**
Transportation (Median*)	$50	$50	$50	$50	$60
Food (Median*)	$58	$60	$60	$60	$68
Retail Goods (Mean**)	$85.82	$84.25	$95.06b	$70.47	$81.36
Recreation (Mean**)	$15.09	$15.87	$14.80	$16.82	$16.93

**Medians include zero without outliers*
*** Means including zero without outliers*
#VFR Spending is reported using the mean including zero without outliers because over half of VFR visitors reported spending $0 on lodging.

Day Q14. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine visitors overwhelmingly claim intent to recommend the State as a vacation destination to family and/or friends.



Regional Q38, Day Q19b. How likely will you be to recommend Maine as a vacation destination to friends or relatives?
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
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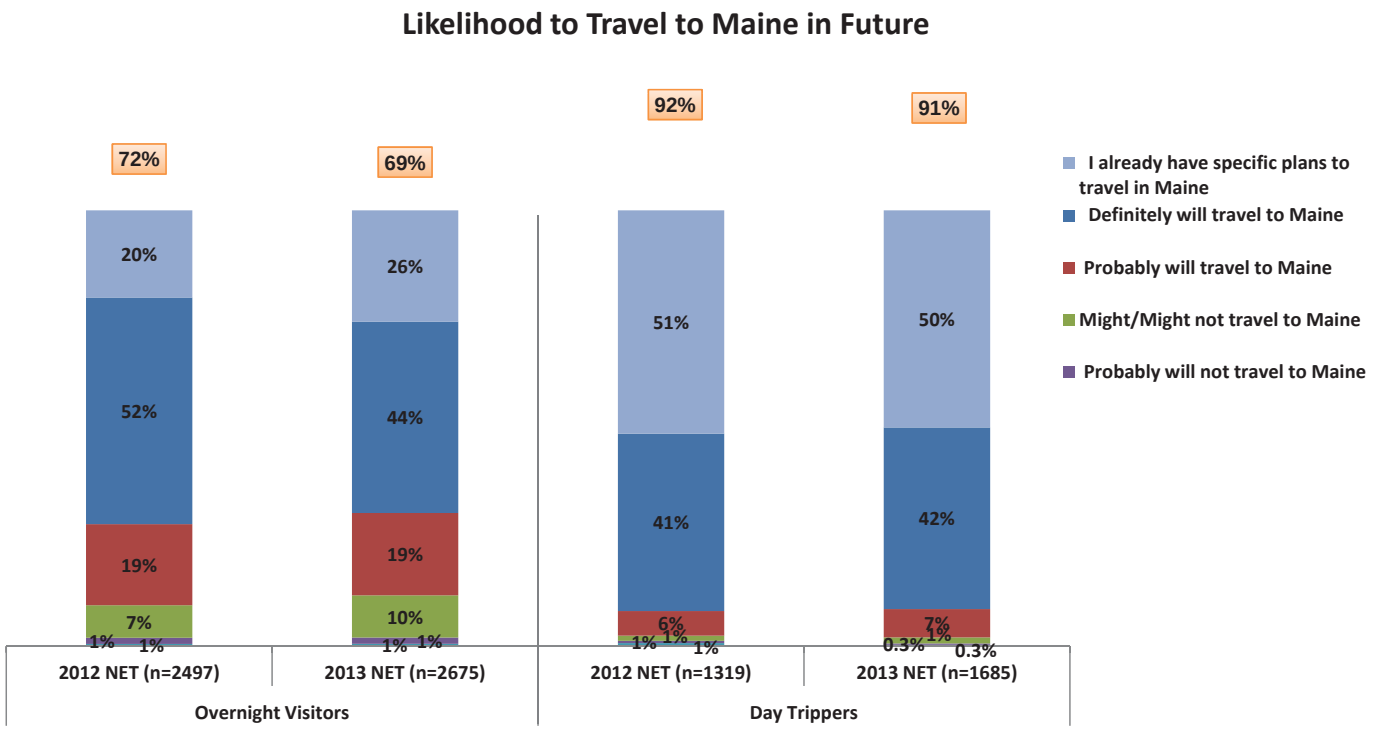
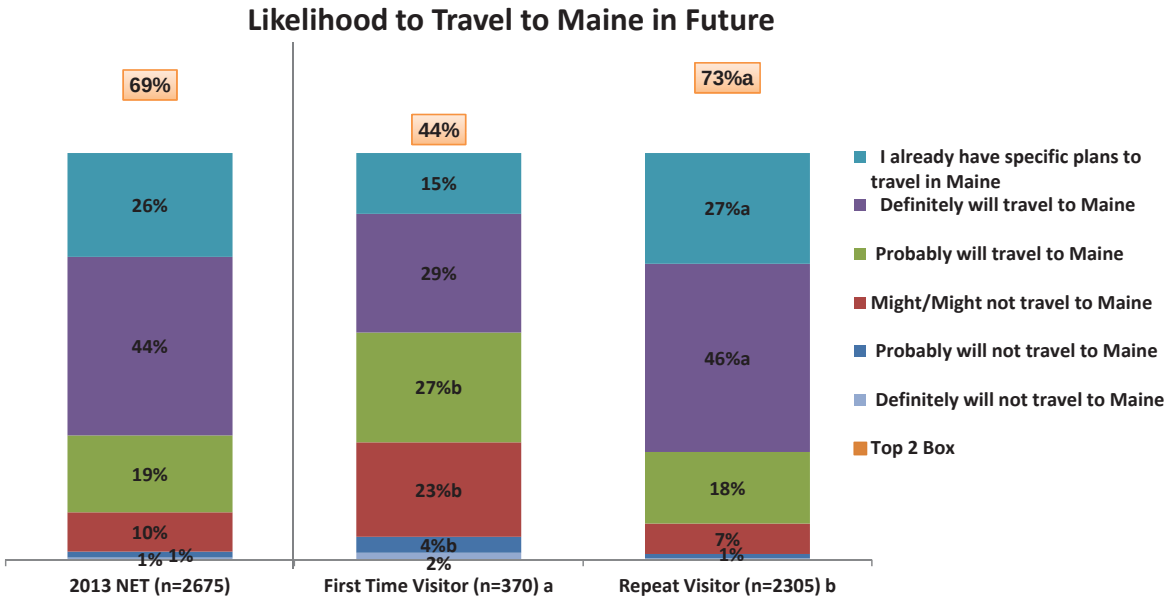
Future travel intent is very strong among Maine visitors, especially day visitors.



Regional Q37, Day Q19. How likely will you be to travel in Maine in the next two years?
*Added Summer 2012.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight repeat visitors are even more likely to express future travel intent than first-time visitors.

- Overnight visitors coming to Maine for the first time in 2013 are more likely than 2012 first-time visitors to indicate that they *already have specific plans to travel in Maine* in the next two years (15% versus 5%).



Regional Q37, Day Q19. How likely will you be to travel in Maine in the next two years?
*Added Summer 2012.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
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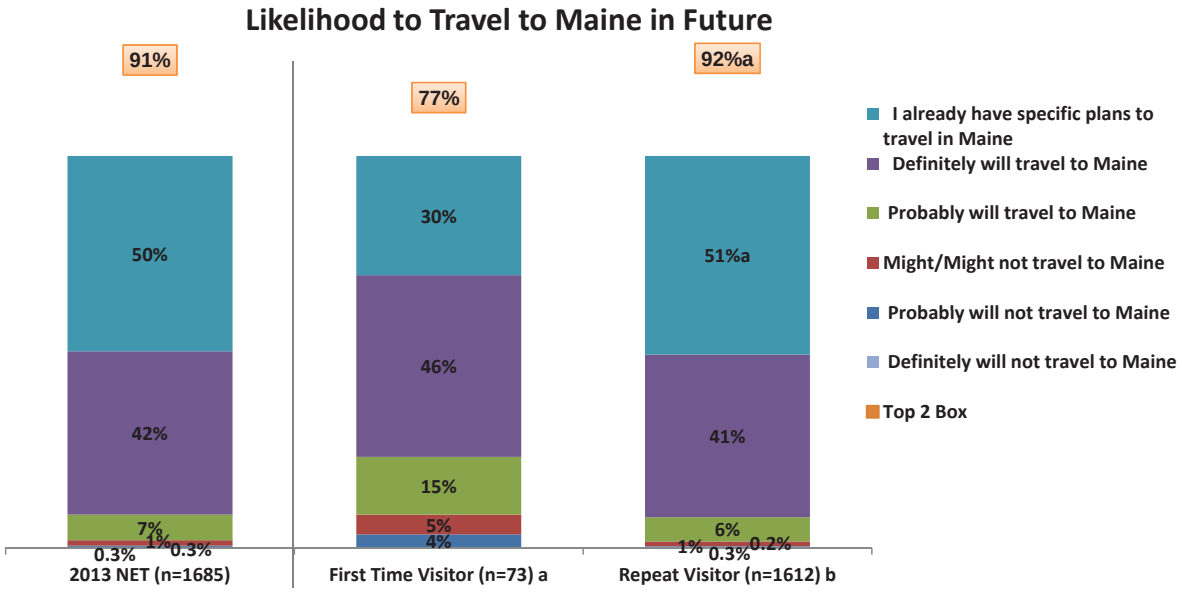
Repeat day visitors are also more likely to express future travel intent than first-time visitors.



Regional Q37, Day Q19. How likely will you be to travel in Maine in the next two years?
*Added Summer 2012.
<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Demographic Profile

Visitor Demographics

	Overnight Visitors		Day Visitors	
	2012 (n=2497)	2013 (n=2675)	2012 (n=1520)	2013 (n=1685)
Age:				
< 35	26%	25%	24%	**20%**
35 – 44	17%	17%	16%	15%
45 – 54	21%	22%	21%	25%
55 +	36%	35%	39%	40%
Mean Age (Years)	47.3	47.1	47.8	49.0
Income:				
< $50,000	11%	11%	16%	19%
$50,000 - $99,000	32%	33%	42%	42%
$100,000 +	43%	45%	41%	39%
Estimated Mean Income	$113,620	$115,427	$101,380	$98,014
Female	48%	47%	49%	**54%**
College Degree or Higher	80%	81%	73%	72%
Married	60%	60%	62%	66%
Employed Full Time	62%	**68%**	63%	63%

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

Conclusions

Conclusions

- **In 2013, Maine continued to outperform national averages in overnight travel.** While the proportion of Americans taking an overnight trip in the U.S. this past year remained stable with 2012, Maine attracted nearly 5% *more* overnight visitors than it had in 2012. This increase was evident despite several factors - a continued high cost of travel (as measured by the Travel Price Index), a summer with above-average amounts of rain, and a government shutdown and sequester which delayed the opening of Acadia National Park.

- **Visitation growth varied seasonally, suggesting an opportunity to grow tourism activity during Maine's less-traveled seasons.** While the Winter and Summer seasons showed year-over-year growth for both overnight and day visitation, visitation during the Fall remained relatively flat from 2012 to 2013. Promotion of Fall activities should be expanded to remind potential visitors of all there is to do in the State during the span of time between a beach vacation and a ski vacation. Maine's various autumn offerings, such as leaf-peeping, festivals, apple-picking, hiking, etc. can all be heavily promoted during the Summer and Fall seasons, reminding visitors of all there is to do in the State year-round.

Conclusions

- **A continued Internet and social media presence is imperative for all of Maine's marketing initiatives.** Unchanged over the last five years, the Internet remains visitors' top source of information when planning their trip to Maine. Two-thirds of visitors report consulting the Internet when planning their most recent trip. Also, ten percent used some form of Social Media when planning their trip, a significant increase over 2012, and a component that is likely to continue growing in the coming years. In addition, the advice of friends/relatives/co-workers remains the second most popular source (after the Internet) of trip planning information – a source that can easily be extended in reach through the use of social media.

- **In addition to strong Internet and social media initiatives, Maine must also continue to provide an easy and informative mobile presence.** Two-thirds of Maine's visitors continue to research locations and activities once they are in the State, and the highest proportion (32%) report using a mobile device to conduct additional research while traveling.

Conclusions

- **Maine maintains strong visitor loyalty, with more than nine in ten visitors reporting intent to recommend Maine as a vacation destination, and a similar proportion reporting intent to visit Maine again within the next two years.** In addition, Maine attracts a high proportion of repeat visitors, further demonstrating solid visitor loyalty. The enthusiasm and recommendations of these loyal visitors can be used in various forms of social media promotion, further capitalizing on potential visitors' usage of the Internet, social media, and recommendations of friends/relatives when making vacation plans.

- **Canadian visitation to Maine increased year-over-year for the second year in a row, continuing to provide a fundamental core market for Maine tourism.** With Canadian visitors more likely than their US counterparts to stay in paid accommodations and spend their time shopping, the average amount of money spent by Canadian visitors in Maine surpasses that spent by Americans. Still, Canadians continue to rate Maine less favorably than US visitors, prompting an additional opportunity for an even greater influx of Canadian visitors and expenditures in the State of Maine. Increased advertising in this core market to educate them of the multitude of activities available in Maine beyond shopping would be advantageous to the Maine tourism industry.

Conclusions

- **While nearly all visitors to Maine are familiar with its beaches, as well as the City of Portland and its surrounding towns, there is a lack of familiarity among some with areas further north and west in the State.** The ongoing challenge is to pull these beach-goers and shoppers further north and "into the woods," so to speak, to explore and experience all that Maine has to offer. Recommended itineraries to extend that beach vacation for a few more days to explore a lakeside retreat in western Maine, or to cap off that shopping trip with a visit to a Maine museum can serve to entice current visitors with a future trip to Maine to enjoy other areas the State has to offer.

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