



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

Regional Insights: Maine Highlands



Prepared by



May 2018

Table of Contents

| | |
|---|-----------|
| Research Objectives and Methodology | 3 |
| Overnight Visitors: | |
| Traveler Description | 7 |
| Trip Experience | 12 |
| Day Visitors: | |
| Traveler Description | 26 |
| Trip Experience | 31 |
| Comparison of Maine Highlands Visitors to All Maine Visitors | 43 |

Research Objectives and Methodology

Research Objectives and Methodology

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

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

Description of Survey Instruments

National Travel Survey

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

Overnight Visitor Survey

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

Day Visitor Survey

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

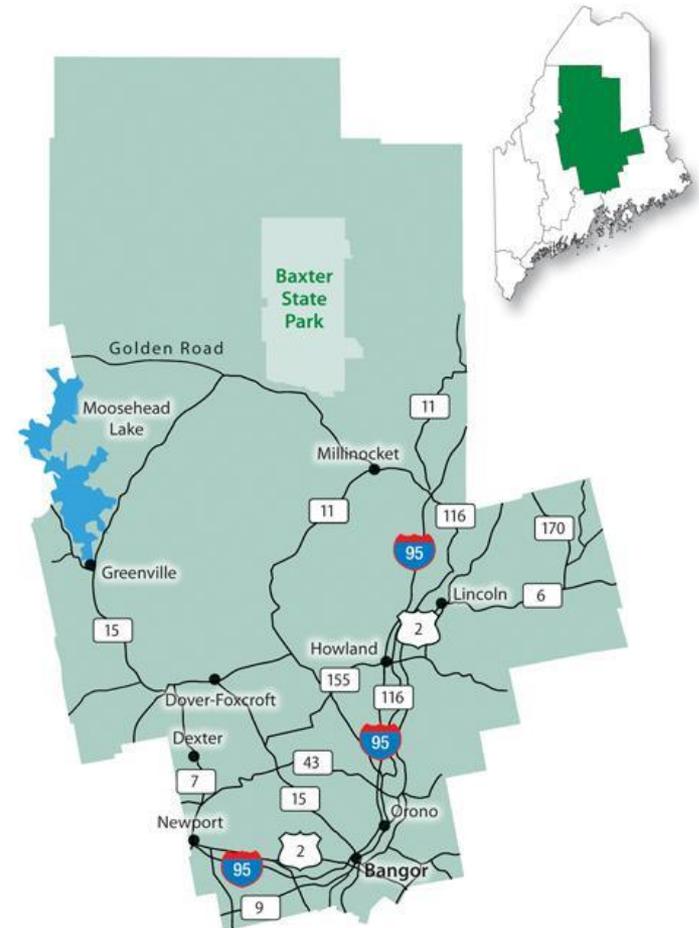
Research Objectives and Methodology

- Survey results were collected during calendar year 2017, for travel to Maine occurring between December 2016 and November 2017. The number of respondents participating in each survey statewide is:

| Research Component | 2017 Completed Surveys |
|--------------------------|------------------------|
| Overnight Visitor Survey | 2,922 |
| Day Visitor Survey | 1,782 |
| National Travel Survey | 22,070 |

Research Objectives and Methodology

- The following report provides a profile of visitors and their trips to the **Maine Highlands** tourism region during 2017, including:
 - 402 overnight visitors, and
 - 138 day visitors.
- Throughout this report, data for the **Maine Highlands** tourism region will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by < >. *(A statistically significant difference means the observed difference is more than would be expected by chance 95 out of 100 times.)*
- Statistically significant differences between 2016 and 2017 are also highlighted for both the Maine Highlands region and the State of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.



Overnight Visitors: Traveler Description

Overnight Visitor Demographics

- Overnight visitors to the Maine Highlands region are, on average, 38 years old and have average annual household incomes of about \$87,000. Nearly two-thirds have at least a college degree, and two in five are married. Six in ten are employed full-time.
- Maine Highlands visitors tend to be younger and are less likely to be married and have lower household incomes than visitors to the State of Maine as a whole.

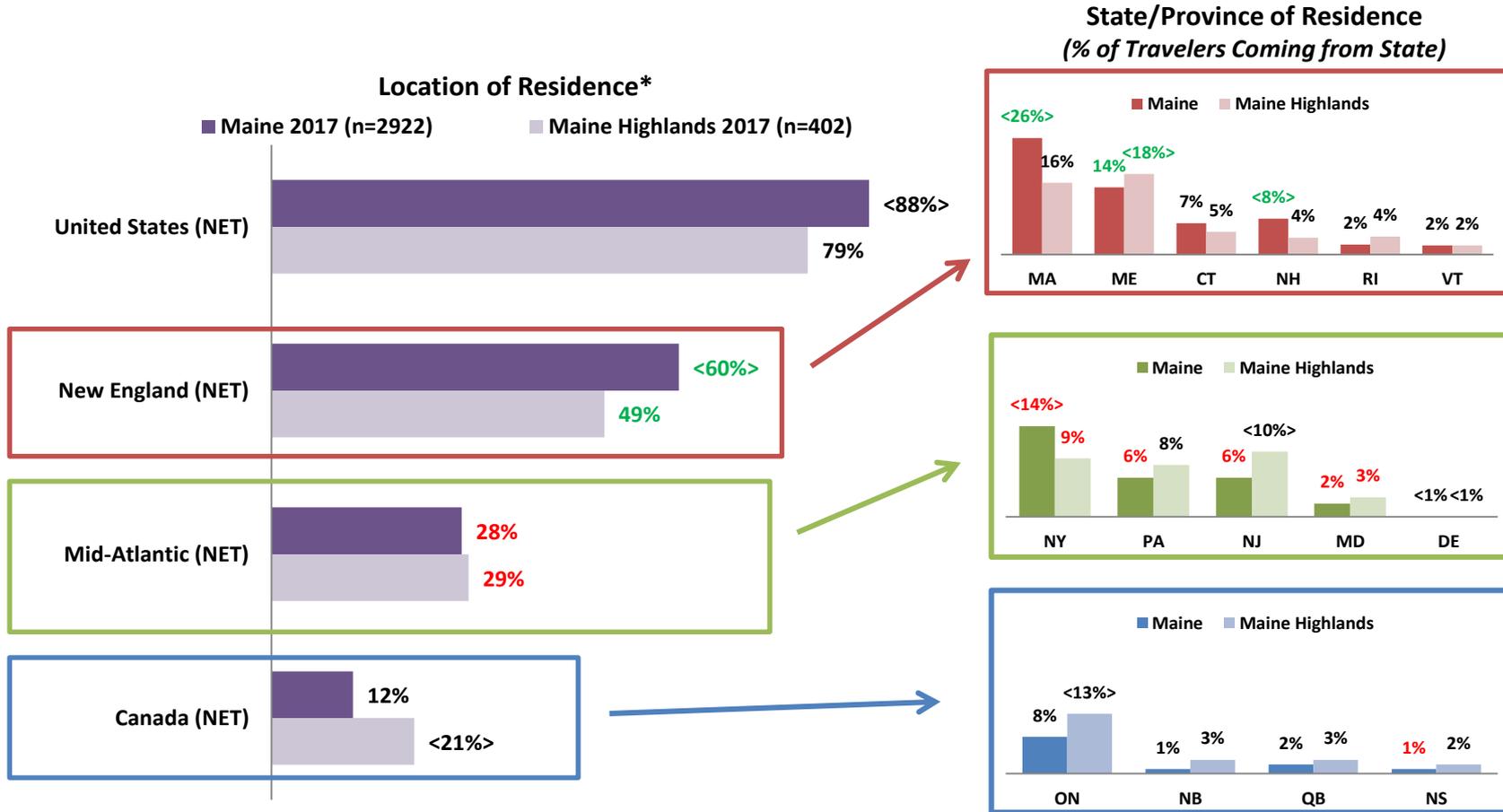
| Overnight Visitors | Maine 2017 (n=2922) | Maine Highlands 2017 (n=402) |
|--------------------------|---------------------------|------------------------------------|
| Age: | | |
| < 35 | 39% | <45%> |
| 35 - 44 | 23% | 25% |
| 45 - 54 | 16% | 17% |
| 55 + | 22% | 12% |
| Mean Age (Years) | <40.7> | 37.5 |
| Income: | | |
| < \$50,000 | 23% | 28% |
| \$50,000 - \$99,999 | 43% | 42% |
| \$100,000 + | 34% | 30% |
| Mean Income | <\$92,700> | \$86,600 |
| Female | 70% | 66% |
| College Degree or Higher | 65% | 63% |
| Married | <50%> | 43% |
| Employed Full-Time | 62% | 62% |

<> indicates a significant difference between this region and the State 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.

Three-fourths of overnight visitors to the Maine Highlands region are from the United States.

- Compared to the State of Maine as a whole, the Maine Highlands region attracts a greater proportion of overnight visitors from Canada, and a lesser proportion from the United States (especially New England).
- Overnight visitors to the Maine Highlands are less likely than visitors to Maine overall to come from Massachusetts, New Hampshire, and New York. They are more likely to come from Maine, New Jersey, and Ontario.



*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

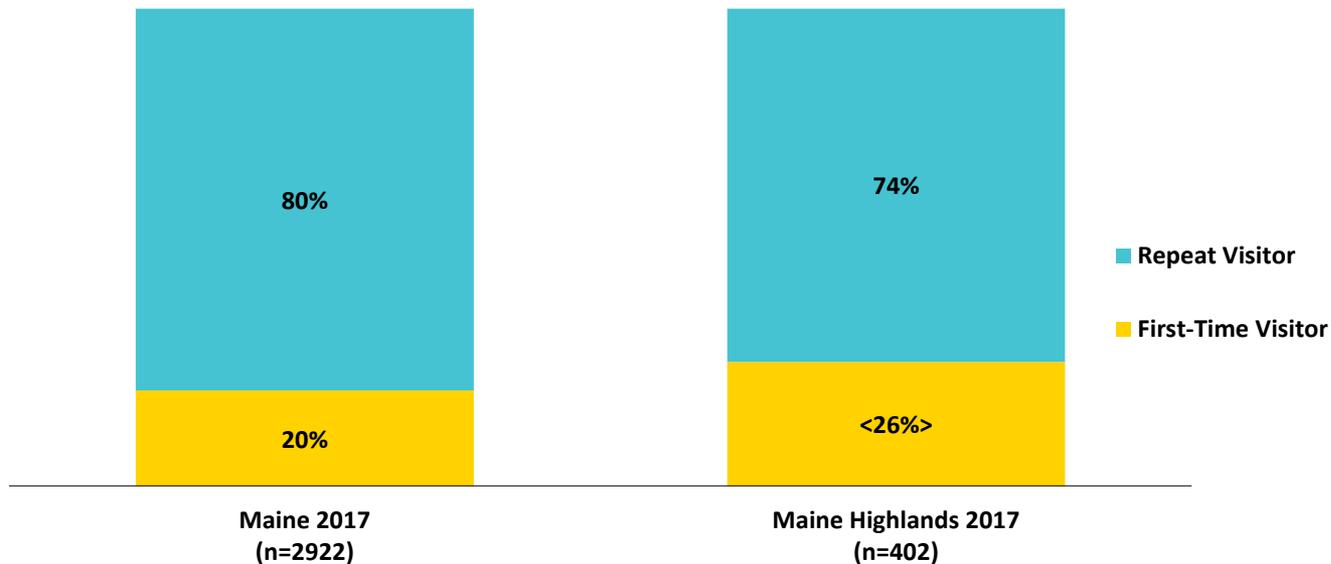
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

One-fourth of overnight visitors to the Maine Highlands region are visiting for the first time.

- Overnight visitors to the Maine Highlands region are more likely to be visiting Maine for the first time than are visitors to the State as a whole.

Repeat vs. First-Time Visitors

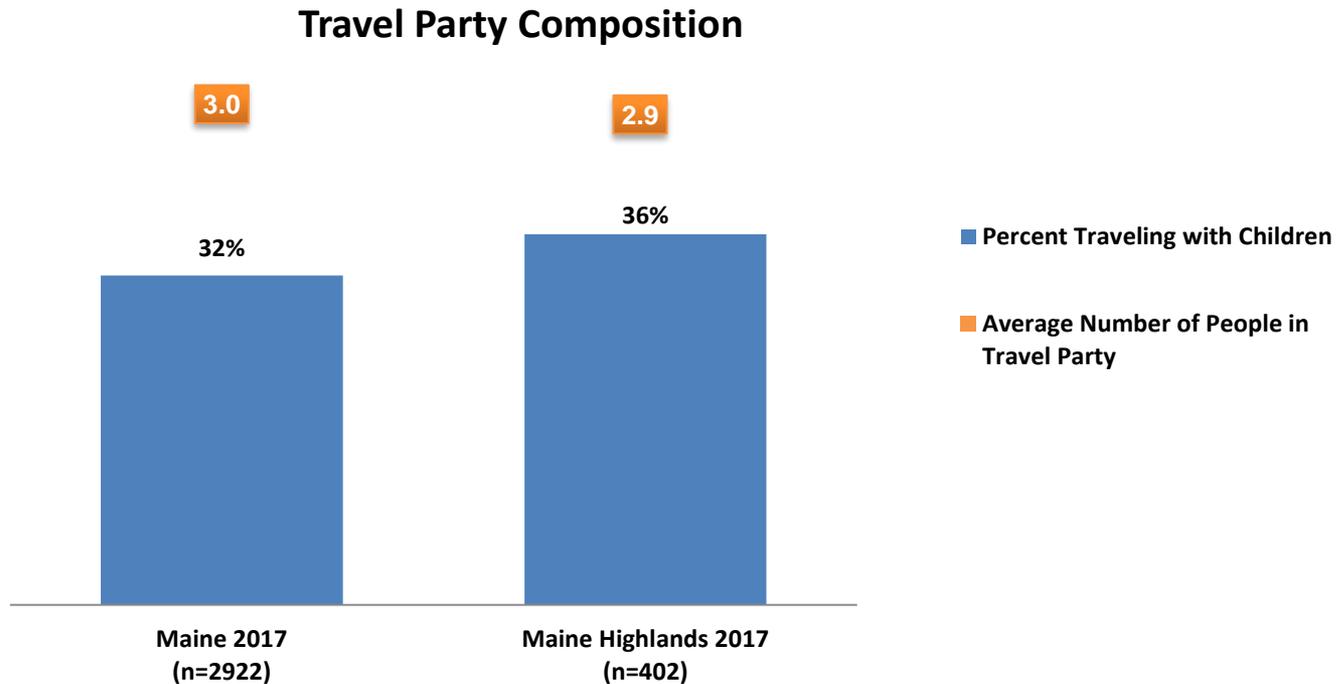


Q11. Was this your first visit in Maine?

<> indicates a significant difference between this region and the State 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 average overnight visitor to the Maine Highlands region is traveling in a party of three, and one-third are traveling with children.



Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q25. How many of these people were: Children?

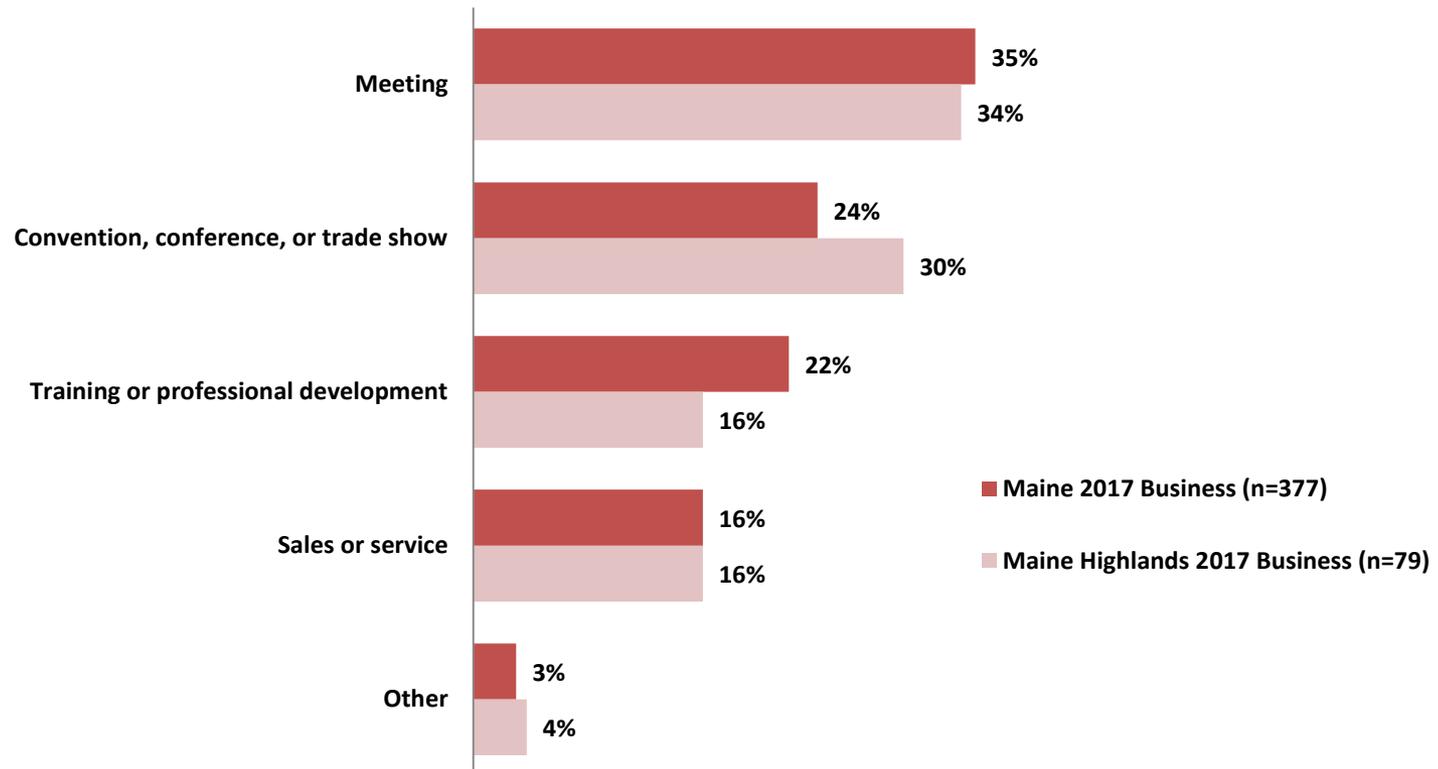
<> indicates a significant difference between this region and the State at the 95% confidence level.

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Overnight Visitors: Trip Experience

A meeting or a convention/conference/trade show are the top reasons for an overnight business trip to the Maine Highlands region.

Primary Purpose of Overnight Business Trips



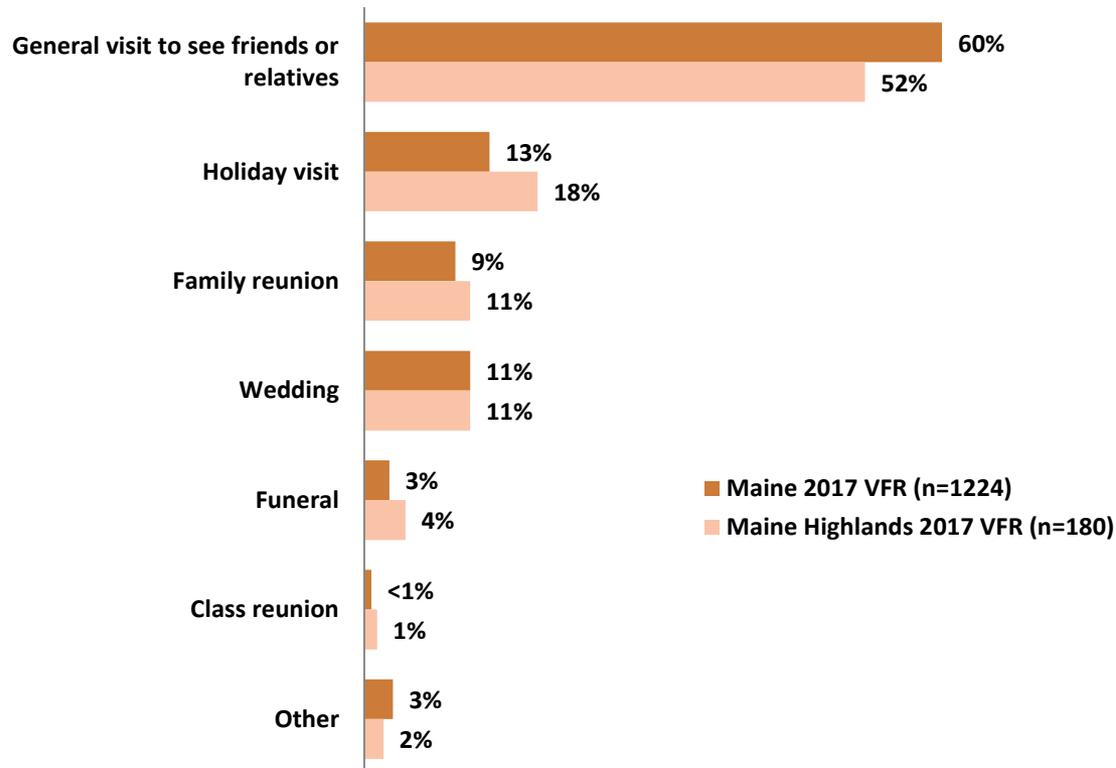
Q8. What was the primary purpose of your most recent business trip in Maine?

<> indicates a significant difference between this region and the State 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 VFR travelers to the region most often cite a *general visit to see friends/relatives* as the primary purpose of their trip.

Primary Purpose of Overnight VFR* Trips



Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

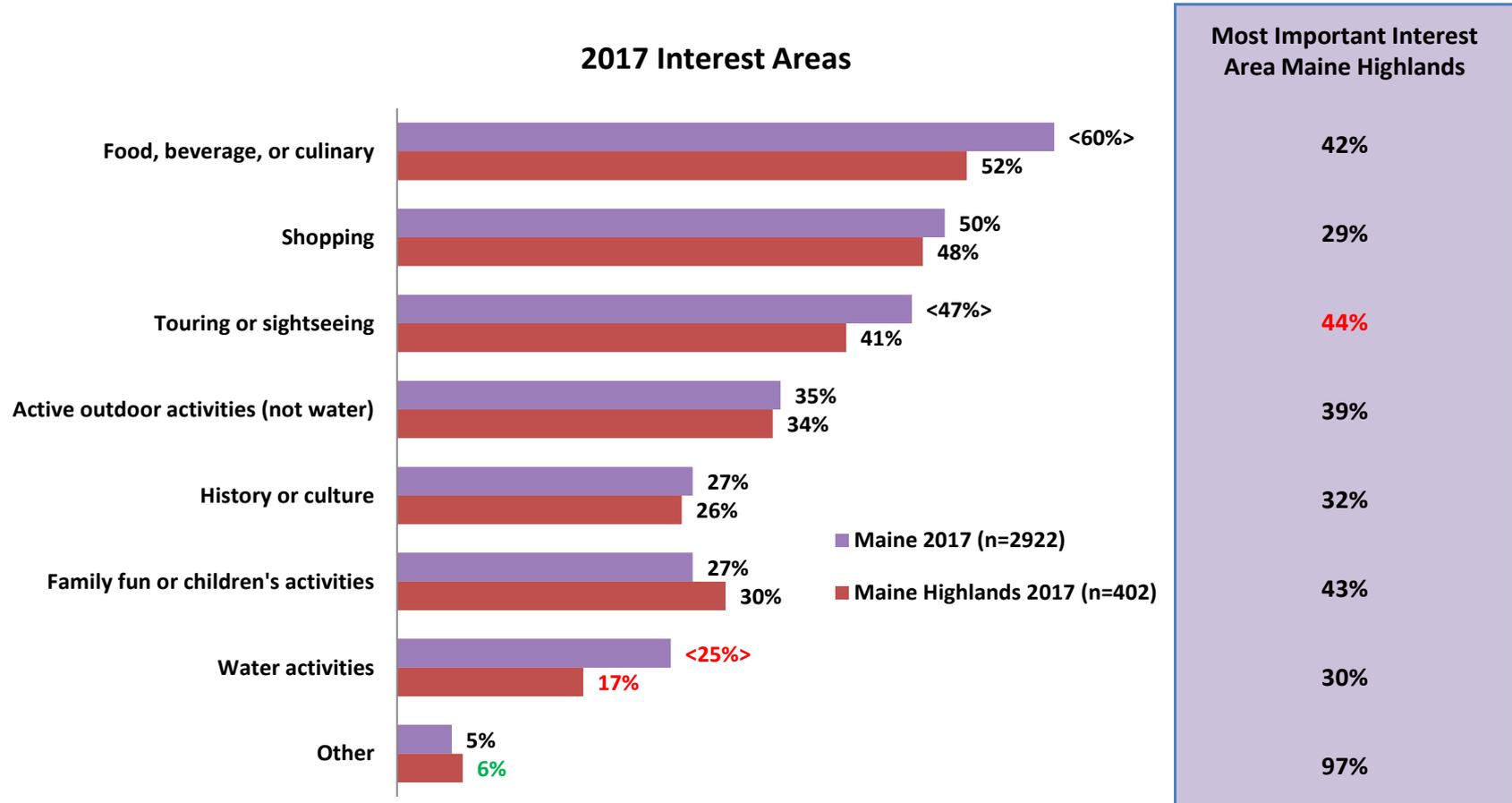
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

*VFR = Visiting Friends and Relatives

Half of overnight travelers to the Maine Highlands region are interested in pursuing *food/beverage/culinary* activities or *shopping* while in the area.

- Overnight visitors to the Maine Highlands region are less likely than visitors to the State as a whole to be interested in *food/beverage/culinary* activities, *touring/sightseeing*, and *water activities* while visiting.



Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

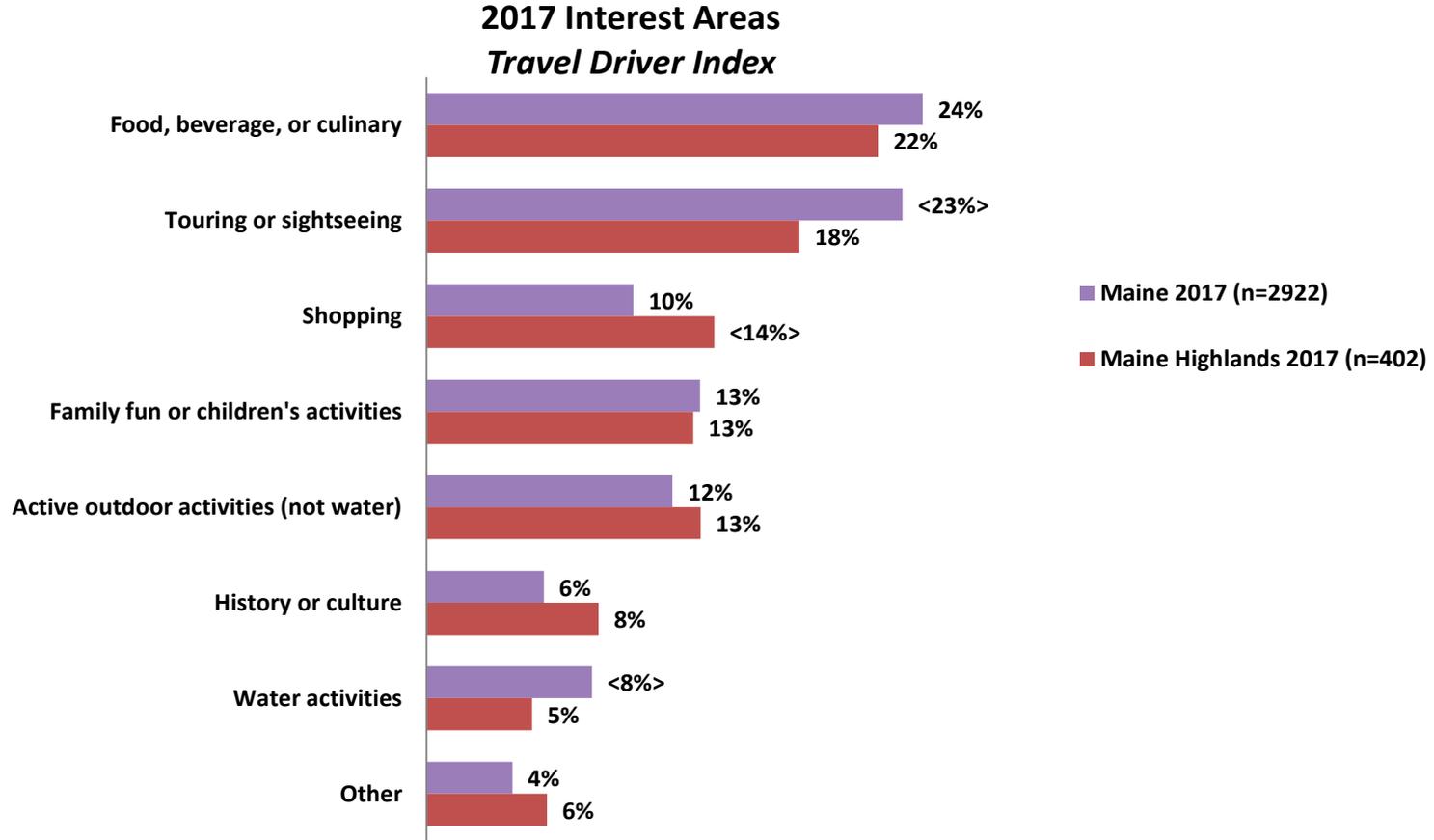
Q36. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

<> indicates a significant difference between this region and the State 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.

When considering both interest and importance in deciding to visit, food/beverage/culinary activities rank highest among overnight visitors to the Maine Highlands region, followed by touring/sightseeing.

- Shopping is a stronger visitation driver to the Maine Highlands region than for the rest of the State, while touring/sightseeing and water activities are not as strong drivers for the Maine Highlands region as compared to the rest of the State.



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important



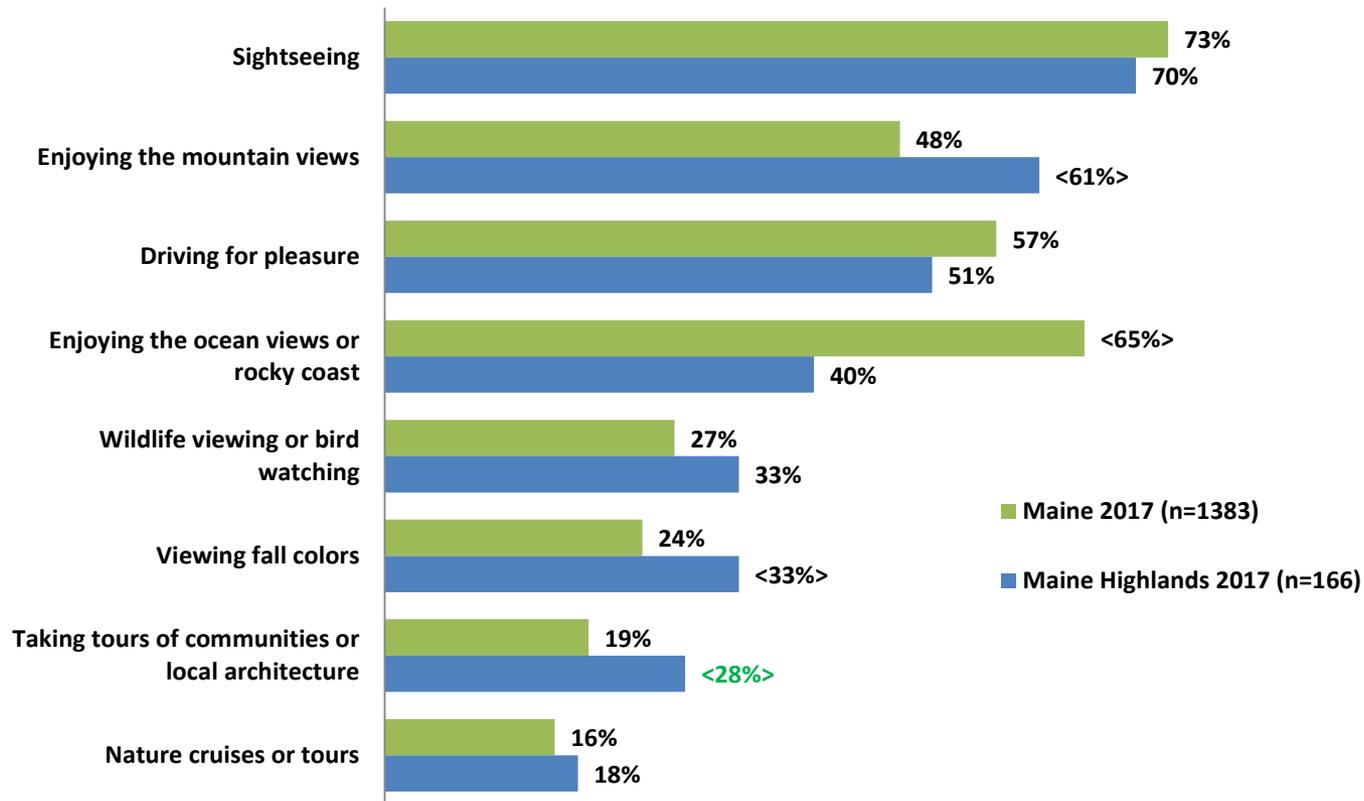
Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q36. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 16
 <> indicates a significant difference between this region and the State at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General sightseeing is the most common touring/sightseeing activity of overnight visitors to the Maine Highlands region, followed by enjoying the mountain views

- Maine Highlands visitors are more likely to enjoy mountain views, view fall colors, and take tours of communities or local architecture compared to visitors to Maine overall, but less likely to enjoy the ocean views.

Touring or Sightseeing Activities

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



Q37. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between this region and the State at the 95% confidence level.

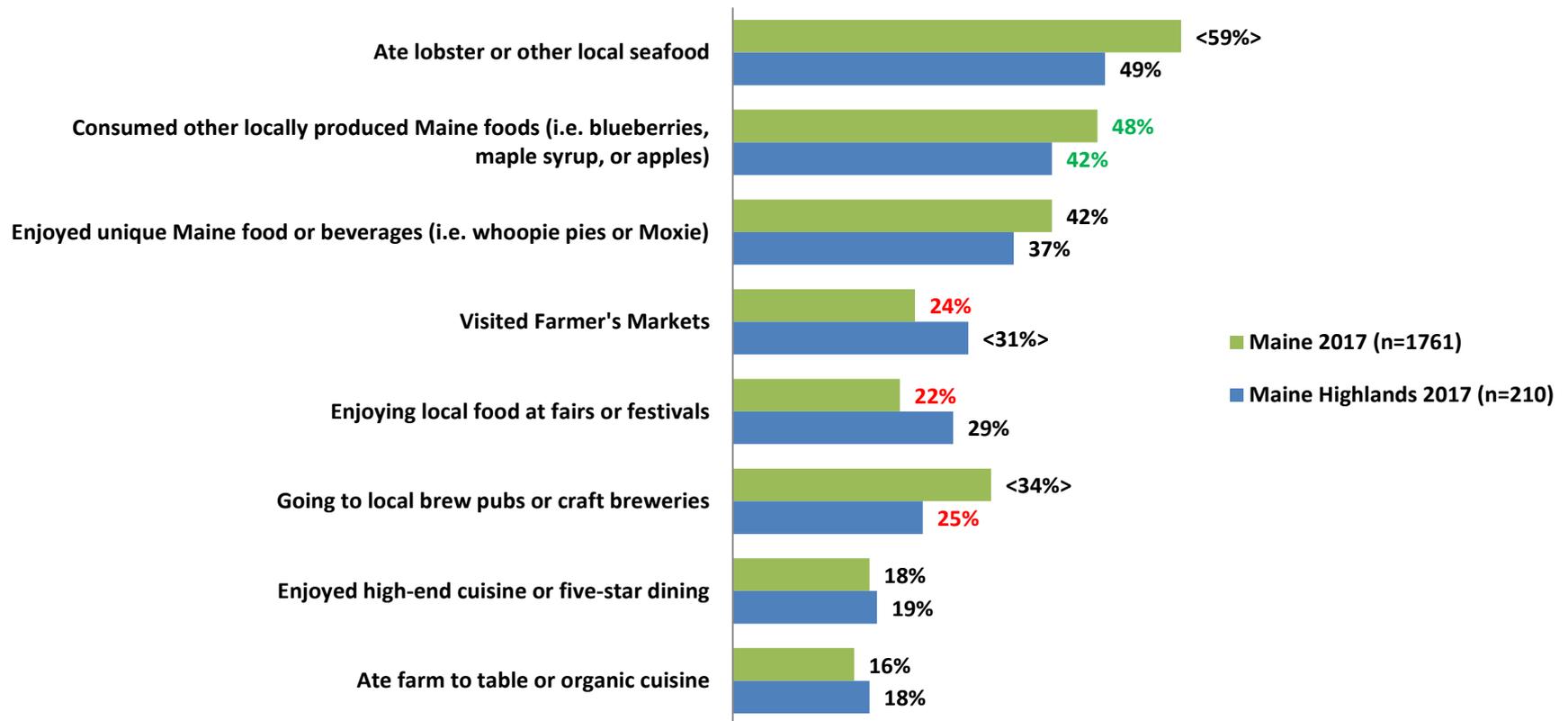
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common food/beverage/culinary activity among Maine Highlands overnight visitors is *eating lobster or other local seafood*.

- *Eating lobster/other local seafood* and *going to local brew pubs or craft breweries* are both less popular among Maine Highlands visitors than among visitors to Maine as a whole. *Visiting Farmer's Markets*, however, is more popular among this region's overnight visitors.

Food, Beverage, or Culinary Activities

Base: Those who report food, beverage, or culinary as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

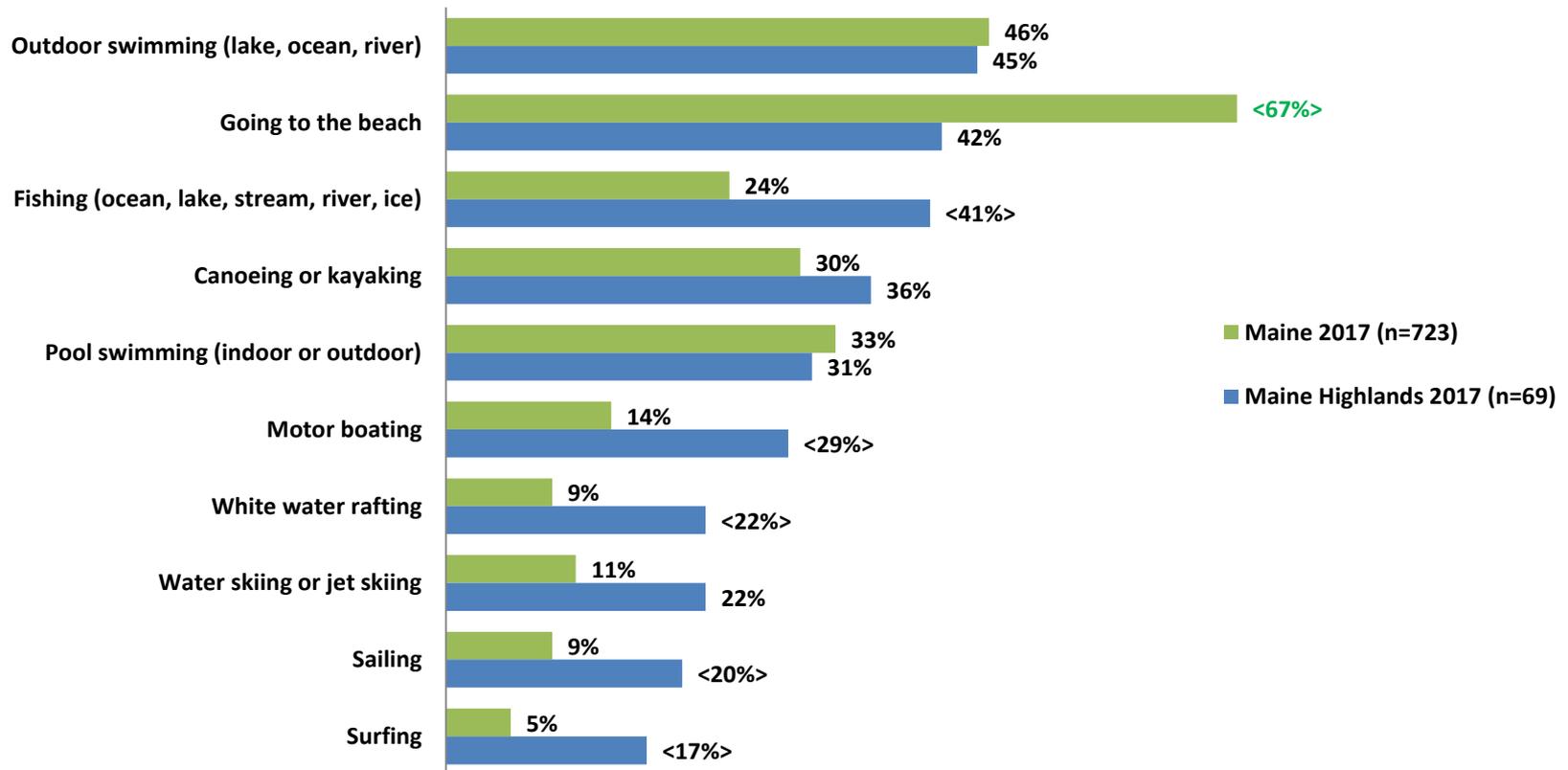
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common water activities among overnight visitors to this region are *outdoor swimming, going to the beach, and fishing.*

- Overnight visitors to the Maine Highlands region are less likely than visitors to the State overall to *go to the beach* while in Maine, but more likely to participate in several other water activities, as shown in the chart below.

Water Activities

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

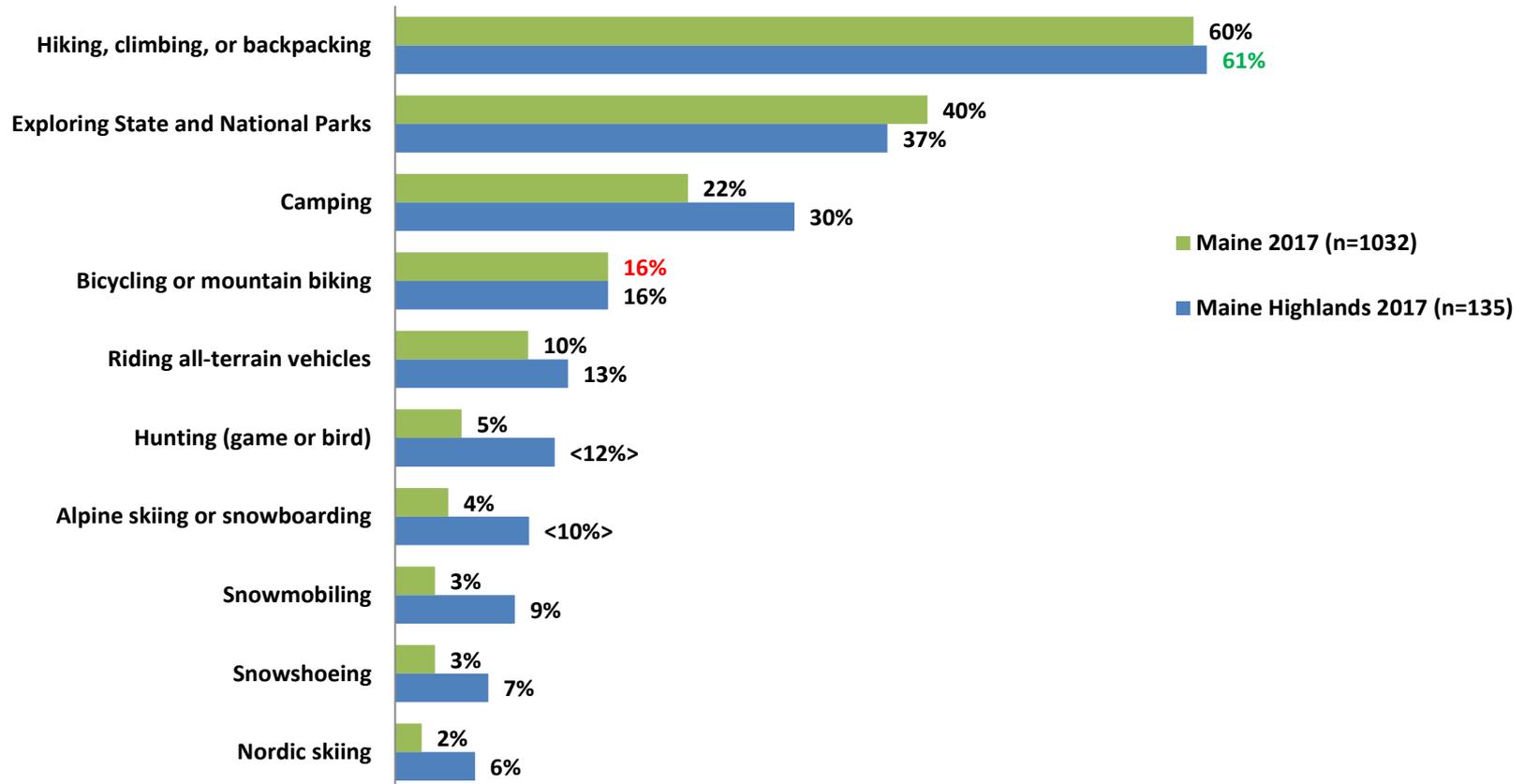
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in five overnight visitors interested in active outdoor activities *hike/climb/backpack* during their overnight visit to the Maine Highlands region.

- *Hunting* and *alpine skiing/snowboarding* are more popular among overnight visitors to the Maine Highlands region than among visitors to Maine as a whole.

Active Outdoor Activities – Non-Water

Base: Those who report outdoor activities as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

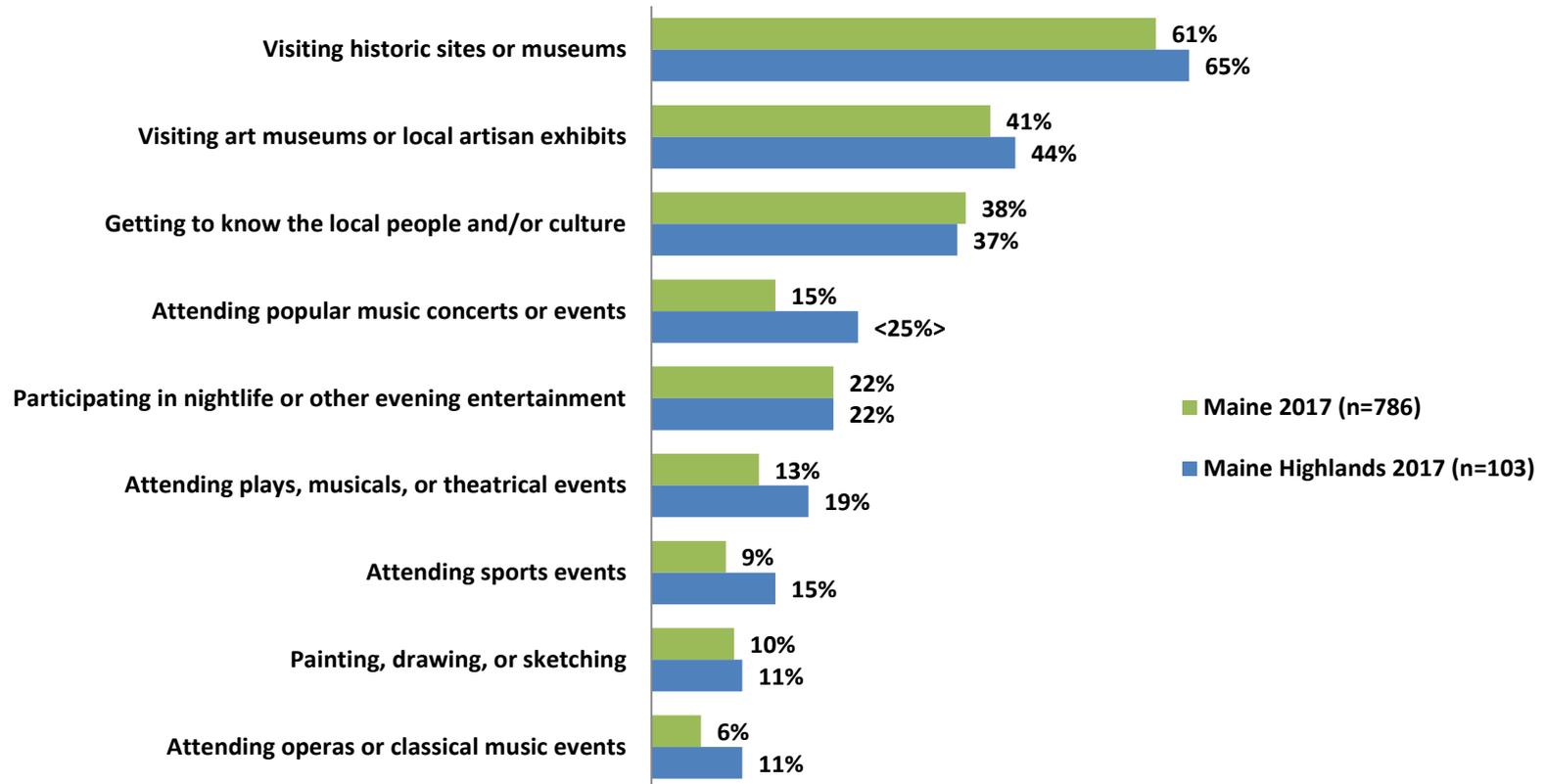
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two-thirds of Maine Highlands visitors interested in history or culture activities *visit historic sites/museums* while in the area.

- *Attending popular music concerts or events* is a more popular history/culture activity among Maine Highlands visitors, as compared to Maine visitors overall.

History or Culture Activities

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



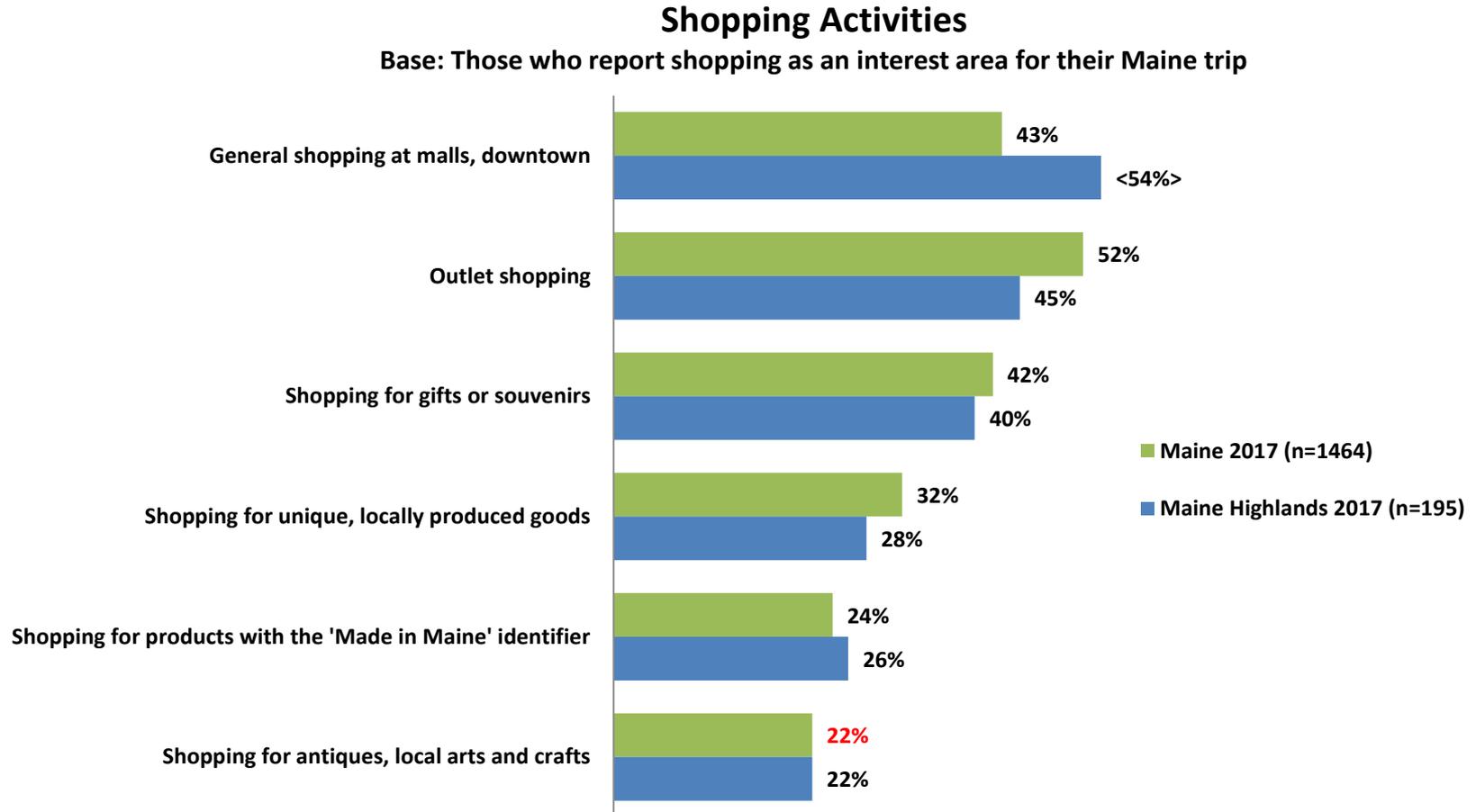
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

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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.

General shopping at malls/downtown is the most common shopping activity participated in by overnight visitors to the region who are interested in shopping.

- Maine Highlands visitors are more likely than Maine visitors overall to do some *general shopping in malls or downtown*.



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

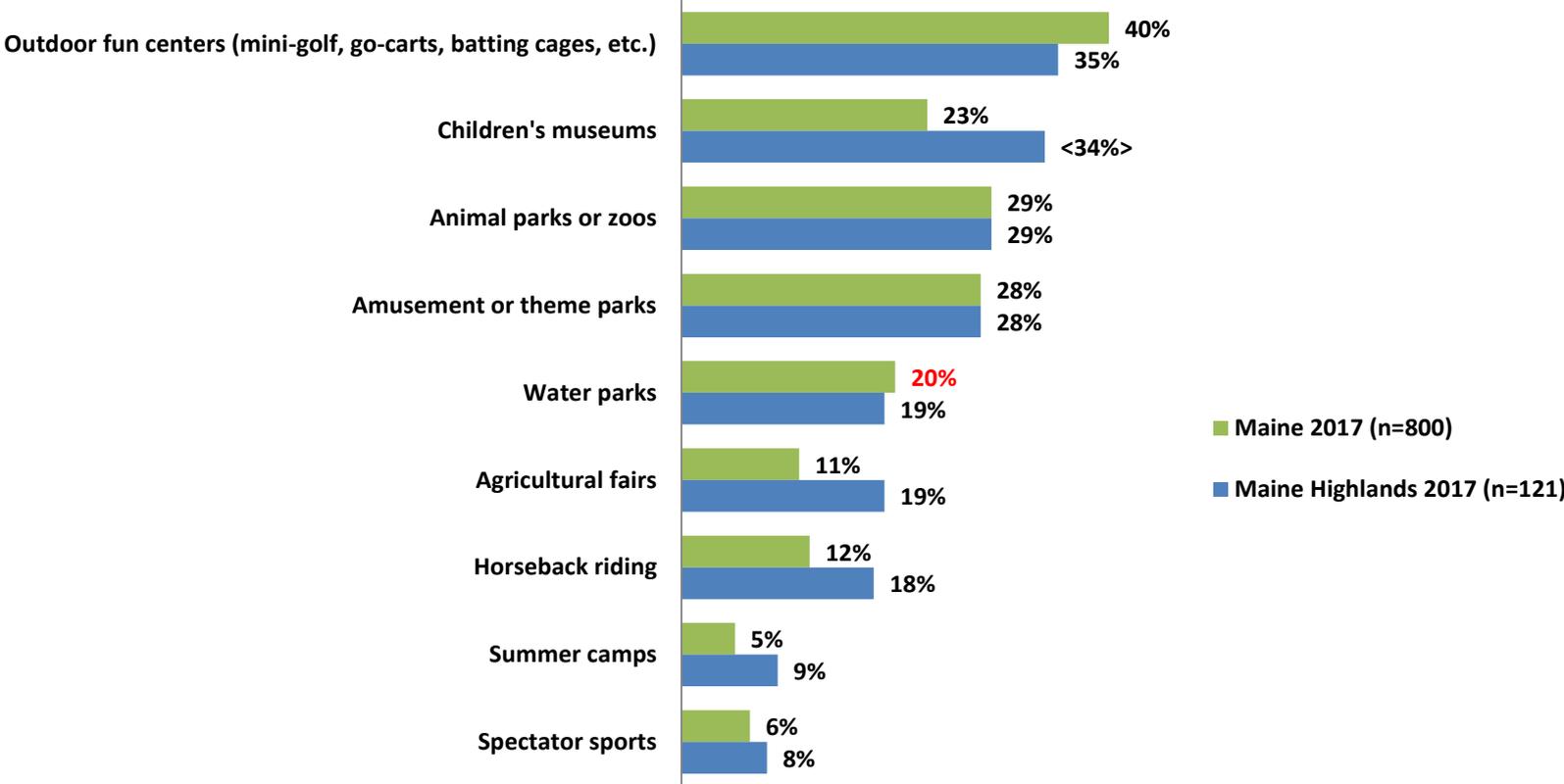
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight visitors to the Maine Highlands region who are interested in family fun/children’s activities participate in a wide variety of these types of activities.

- Children’s museums are a more popular activity among overnight visitors to the Maine Highlands region, as compared to the rest of the State.

Family Fun/Children’s Activities

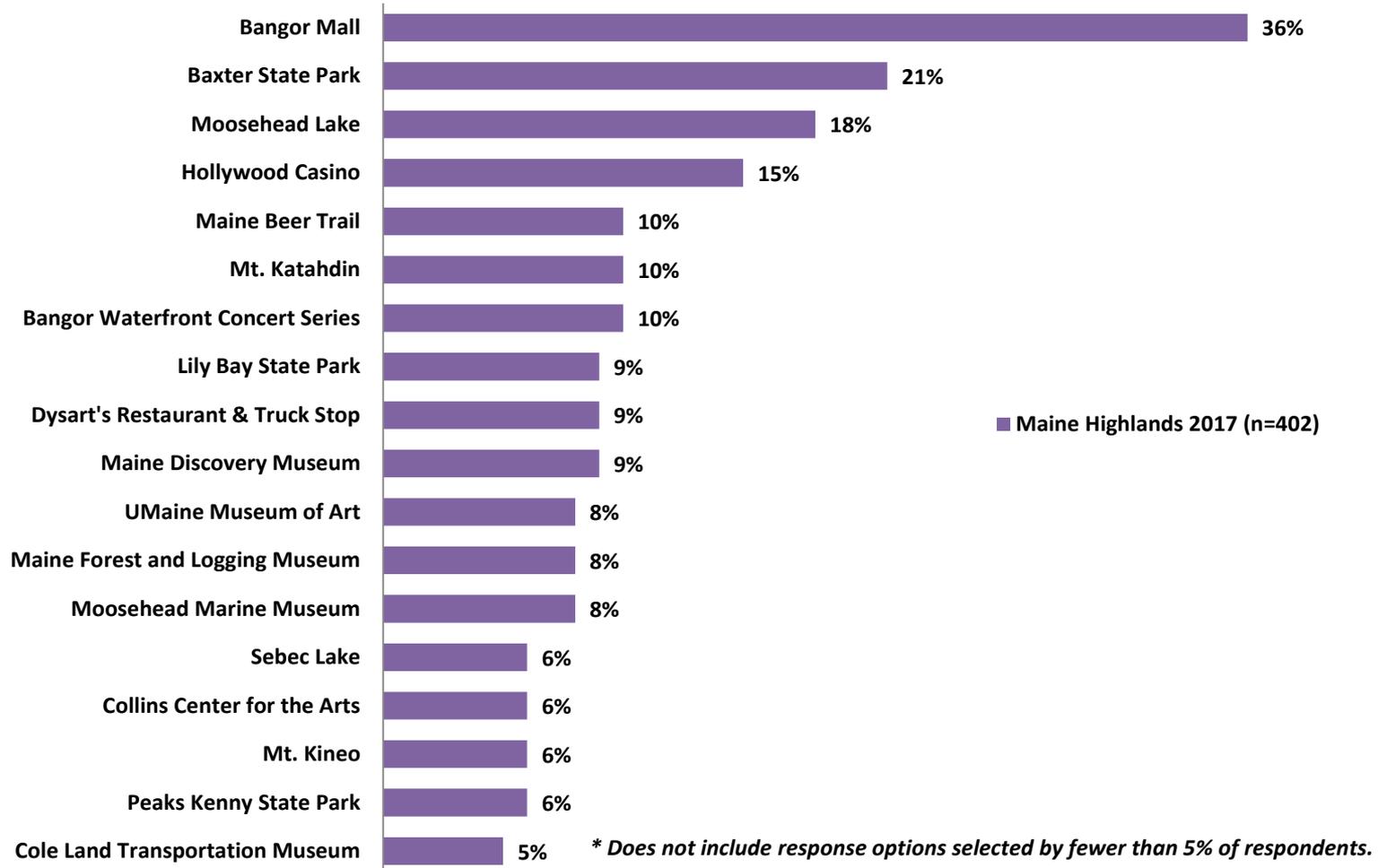
Base: Those who report family fun/children’s activities as an interest area for their Maine trip



Q37. In which of the following activities did you participate during this trip? Please check all that apply.
 <> indicates a significant difference between this region and the State at the 95% confidence level.
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One in three overnight visitors to the Maine Highlands visited the Bangor Mall while in the region.

Top Attractions/Locations Visited*

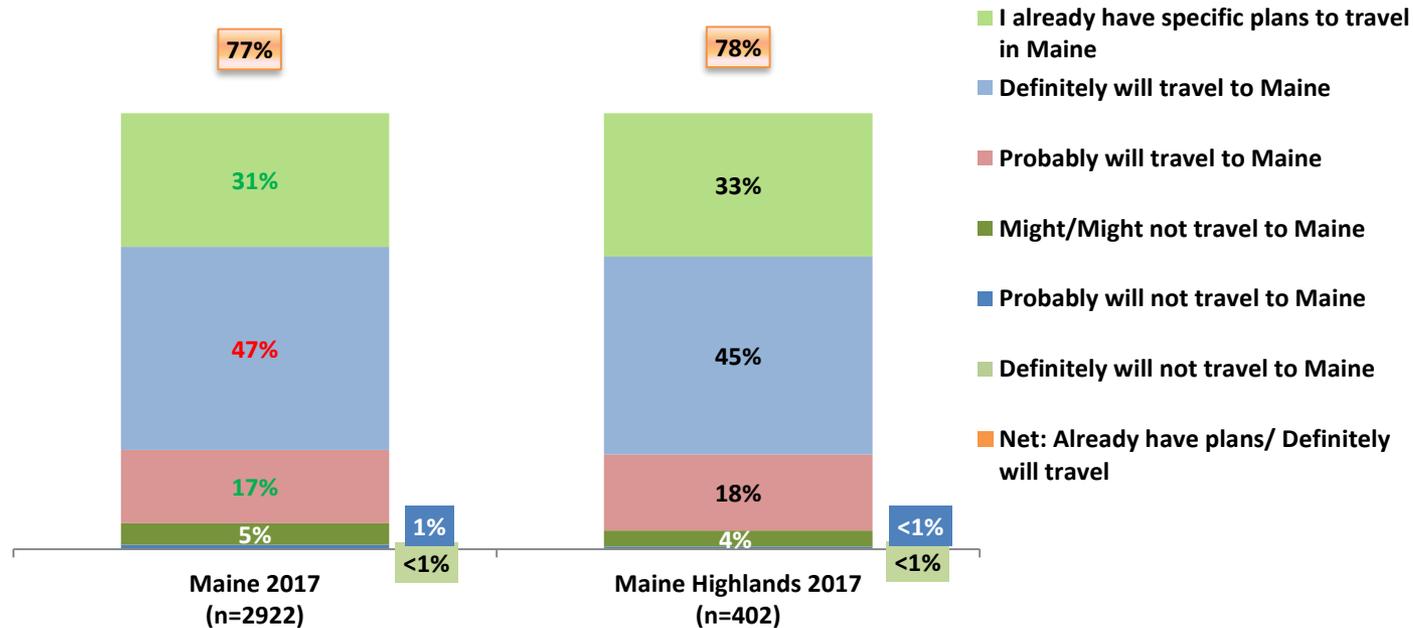


Q32: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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

A strong majority of overnight visitors to the Maine Highlands plan to return to Maine in the next two years (78%).

Future Travel Likelihood



Q44. How likely will you be to travel in Maine in the next two years?

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Day Visitors: Traveler Description

Day Visitor Demographics

- Day visitors to the Maine Highlands region average 40 years of age, and have annual household incomes of about \$66,000. More than half have a college degree, and 52% are employed full-time. One-third are married.
- Day visitors to the Maine Highlands tourism region are younger than Maine visitors overall, have lower annual household incomes, and are less likely to be married.

| Day Visitors | Maine 2017 (n=1782) | Maine Highlands 2017 (n=138) |
|--------------------------|---------------------------|------------------------------------|
| Age: | | |
| < 35 | 33% | 42% |
| 35 - 44 | 19% | 22% |
| 45 - 54 | 19% | 17% |
| 55 + | <29%> | 19% |
| Mean Age (Years) | <44.1> | 39.8 |
| Income: | | |
| < \$50,000 | 32% | <45%> |
| \$50,000 - \$99,999 | 41% | 40% |
| \$100,000 + | 27% | 15% |
| Mean Income | <\$80,800> | \$66,200 |
| Female | 76% | 78% |
| College Degree or Higher | 54% | 55% |
| Married | <48%> | 35% |
| Employed Full-Time | 52% | 52% |

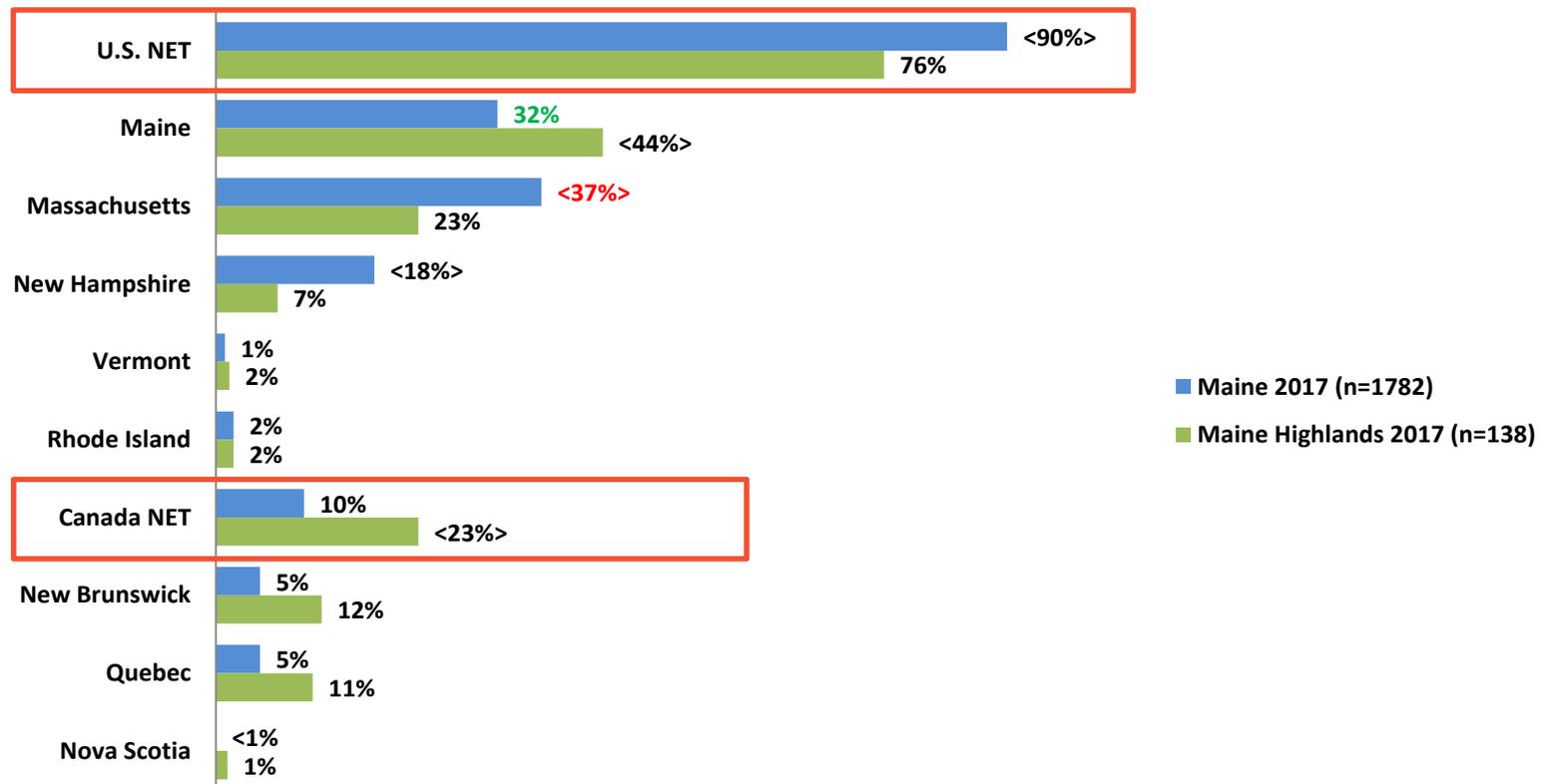
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Three-fourths of day visitors to the Maine Highlands arrive from the United States, while one-fourth come from Canada.

- As compared to day visitors to the State of Maine as a whole, day visitors to the Maine Highlands region are significantly more likely to be from Canada.
- Looking at specific states and provinces, day visitors to the Maine Highlands region are less likely to be from Massachusetts and New Hampshire, but more likely to be from Maine.

State/ Province of Residence



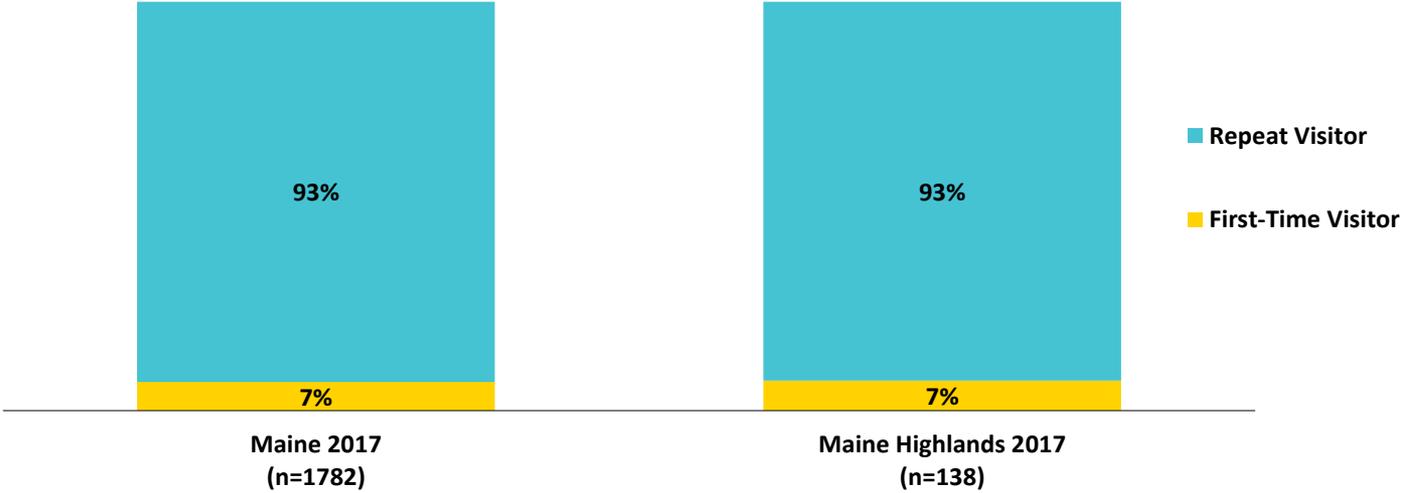
Q2. In what State or Province do you reside?

<> indicates a significant difference between this region and the State 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.

Nine in ten day visitors to the Maine Highlands have previously visited Maine.

Repeat vs. First-Time Visitors

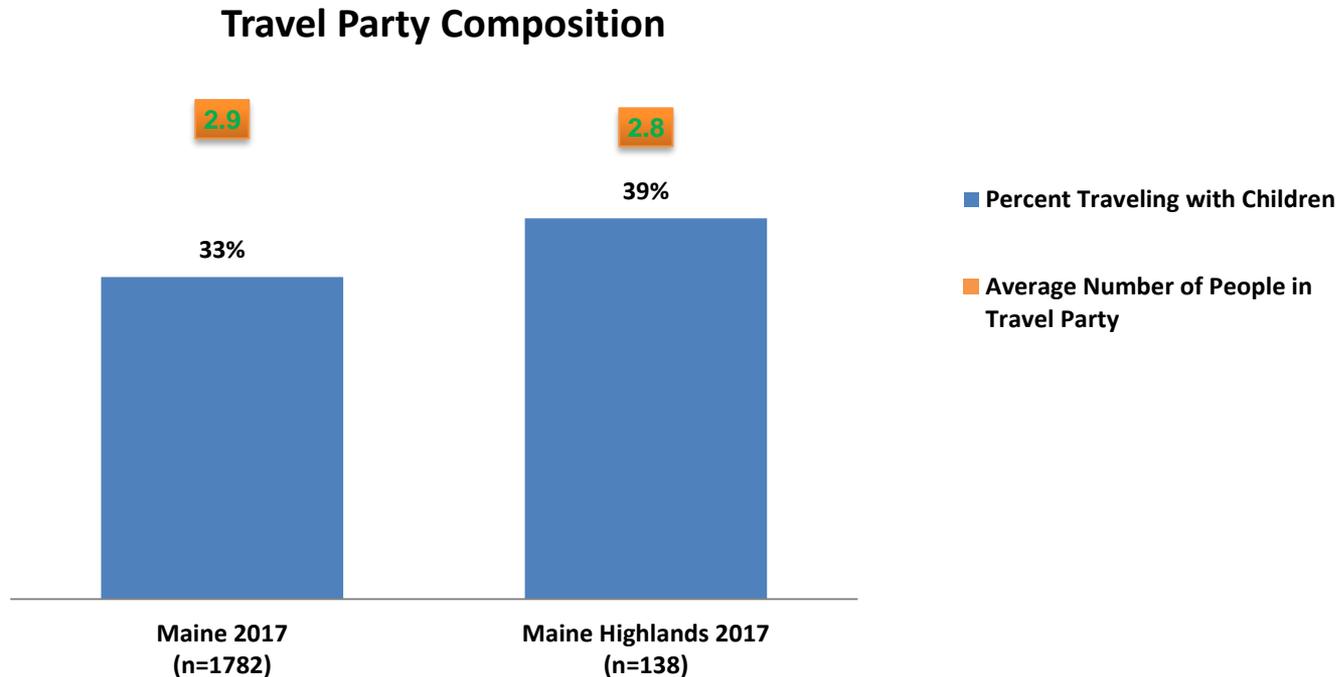


Q10. Was this your first trip to Maine?

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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.

On average, day visitors to the Maine Highlands region travel in parties of three, and two in five are traveling with children.



Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q16. How many of these people were: Children

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Day Visitors: Trip Experience

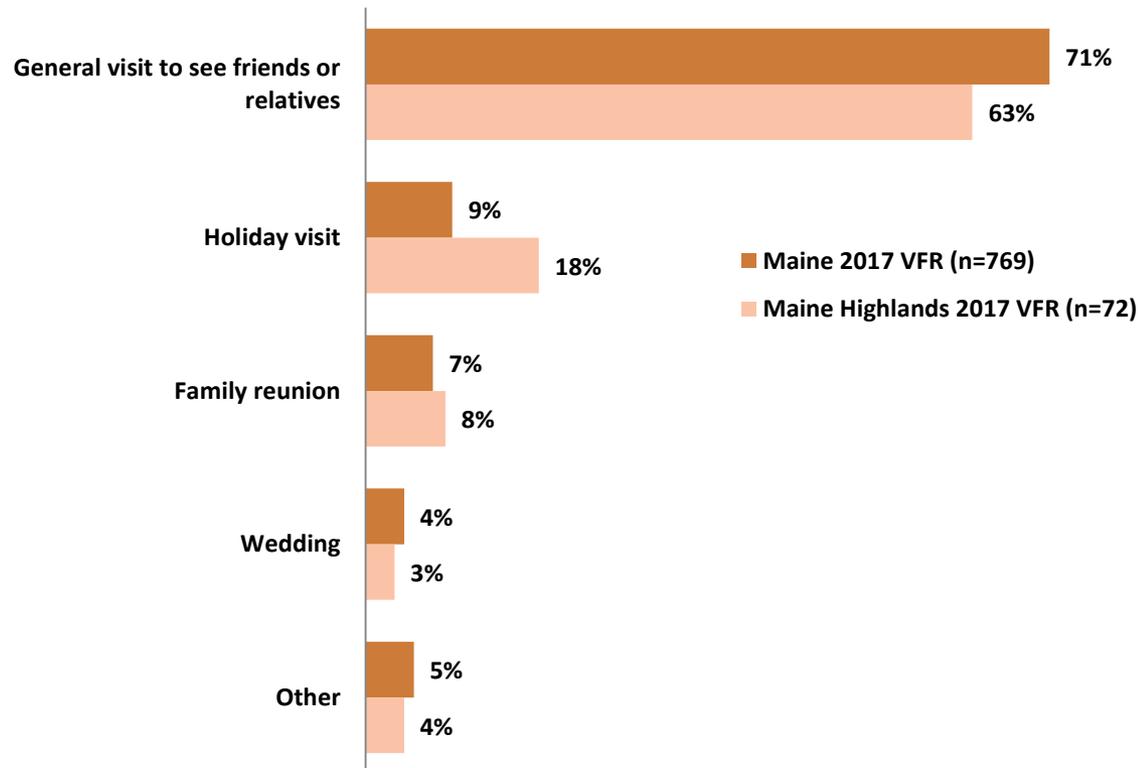
Sample Size Exclusions

Data for some questions is not presented on the following pages because the sample sizes are too small. The results not shown include:

- Primary Purpose of Business Trips (n=16)

Two-thirds of VFR day visitors cite a *general visit to see friends/relatives* as the primary purpose of their trip.

Primary Purpose of Day VFR* Trips



Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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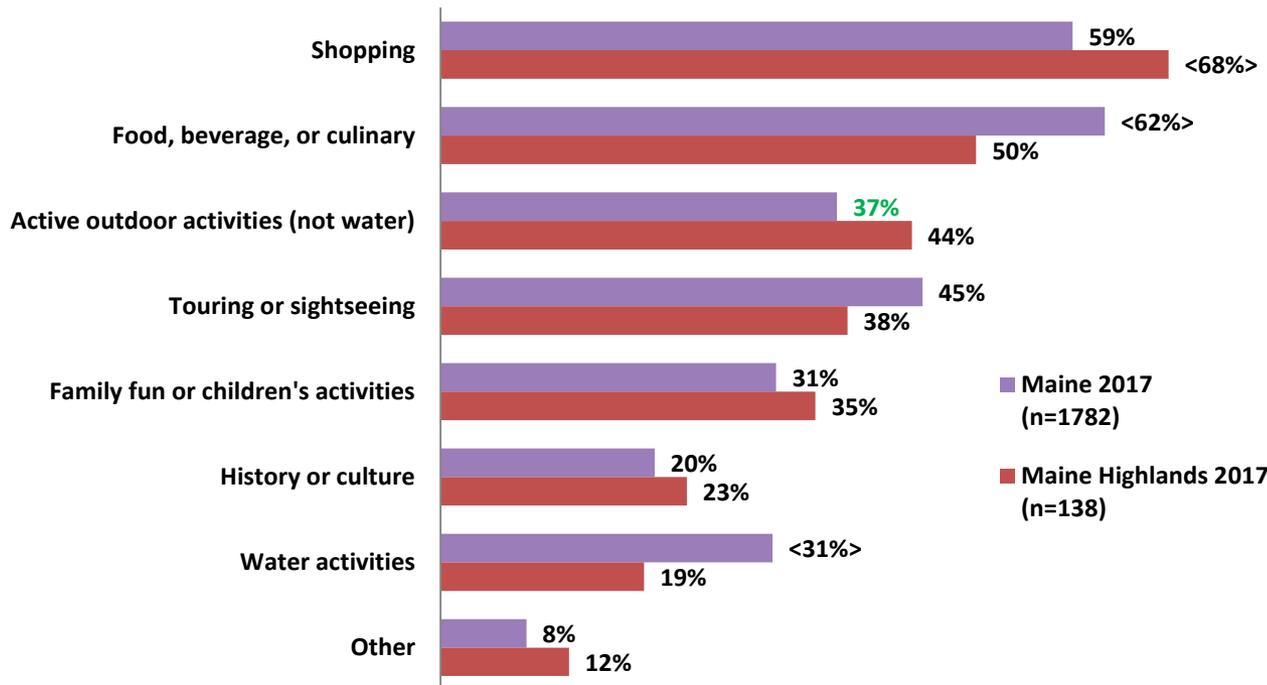
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*VFR = Visiting Friends and Relatives

Shopping is the most common interest area of day visitors to the Maine Highlands region.

- Day visitors to the Maine Highlands region are more likely than day visitors to the State of Maine as a whole to be interested in *shopping*, and less likely to be interested in *food/beverage/culinary activities* and *water activities*.
- More than half of visitors interested in *family fun or children's activities* rate those activities as the most important consideration in their decision to visit.

2017 Interest Areas



| Most Important Interest Area Maine Highlands | |
|---|-----|
| | 24% |
| | 31% |
| | 42% |
| | 40% |
| | 54% |
| | 16% |
| | 8% |
| | 89% |

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

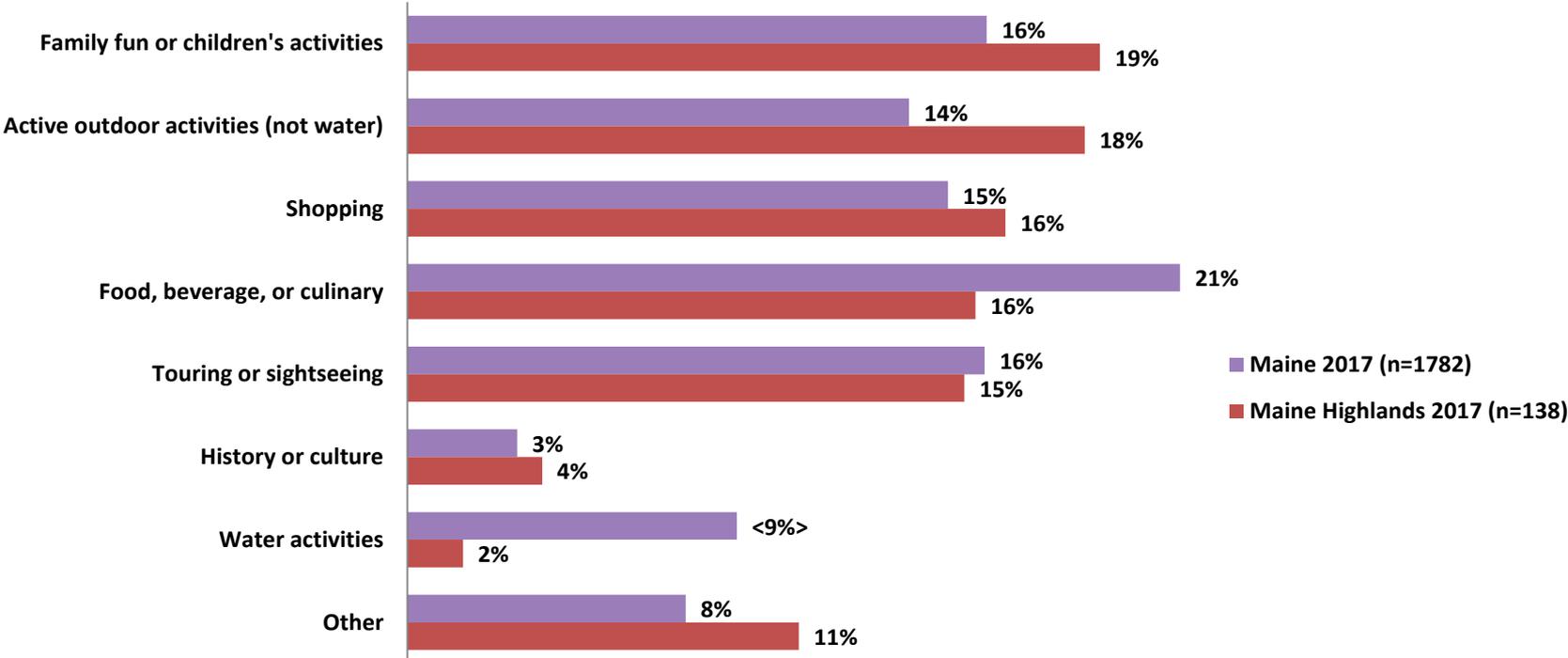
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Family fun/children’s activities and active outdoor activities move to the top ranking among Highlands day visitors when considering both interest and importance together, though several other interests drive travel as well.

- As compared to day visitors to the State as a whole, a lesser proportion of day visitors to the Maine Highlands region rank *water activities* highly when analyzing both interest and importance.

**2017 Interest Areas
Travel Driver Index**



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34
 <> indicates a significant difference between this region and the State 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.

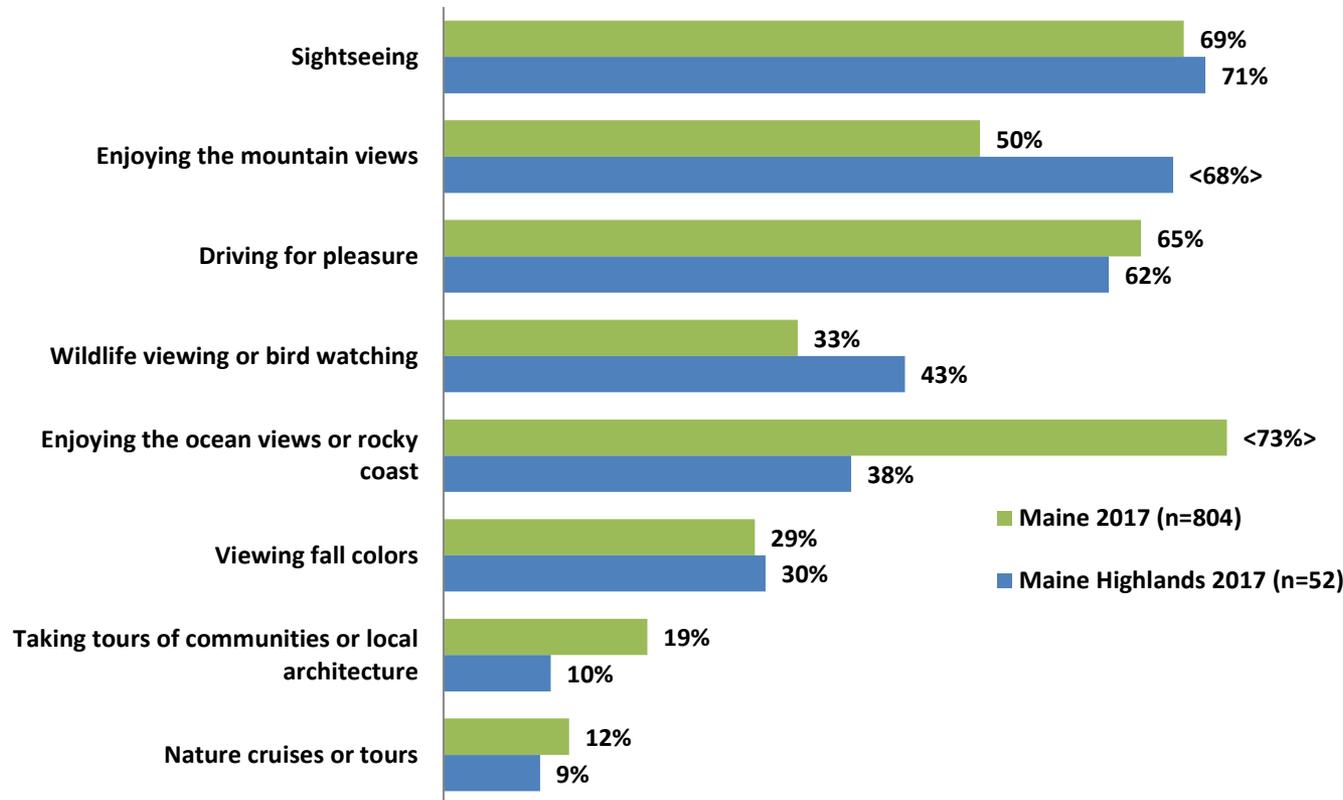


About two-thirds of day visitors to the Maine Highlands who are interested in touring/sightseeing activities spend time *sightseeing, enjoying mountain views, or driving for pleasure.*

- Day visitors to the Maine Highlands region are more likely to *enjoy the mountain views* while visiting than are day visitors to the State as a whole, and less likely to *enjoy the ocean views or rocky coast*.

Touring or Sightseeing Activities

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



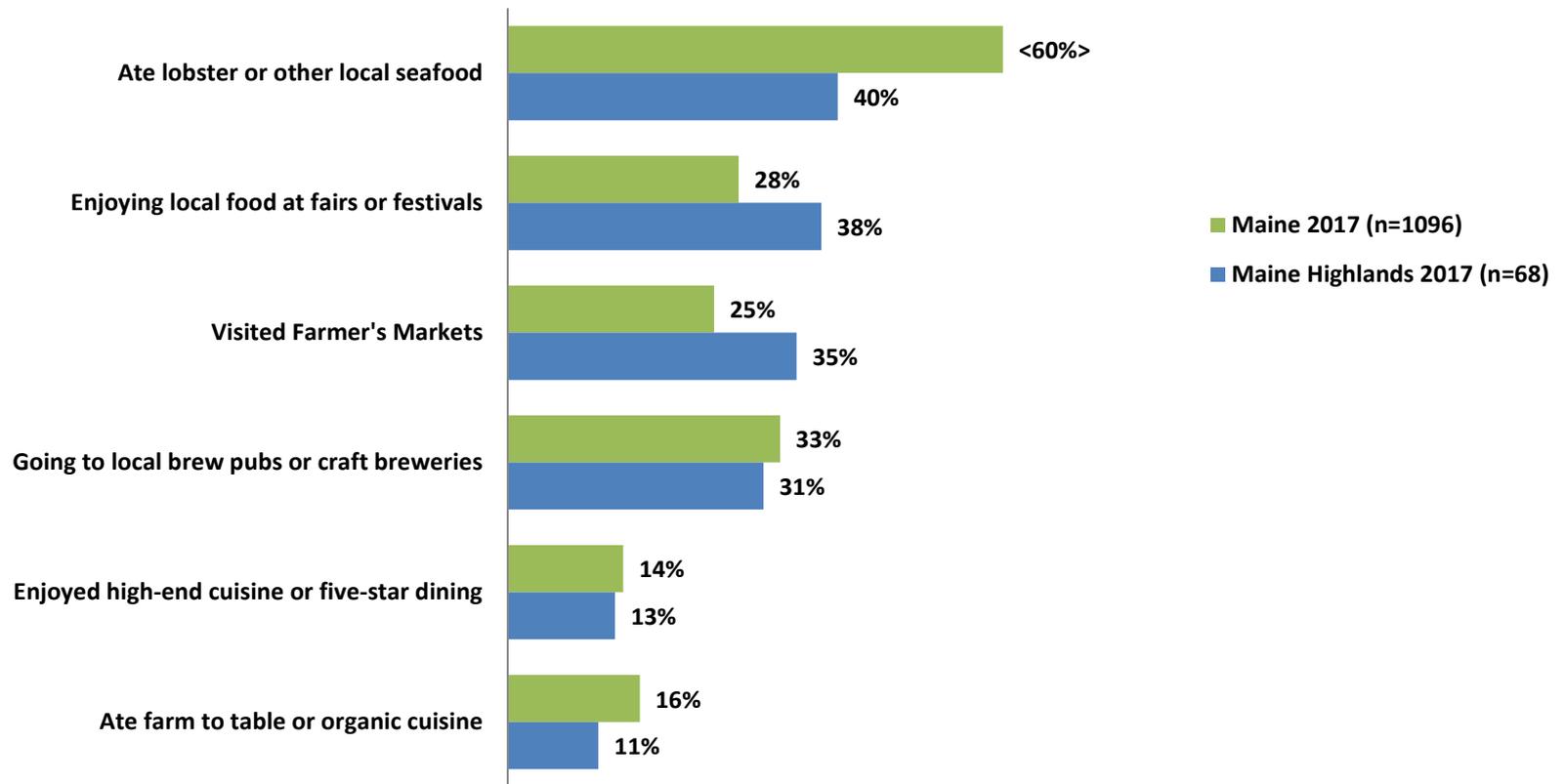
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*
 <> indicates a significant difference between this region and the State at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates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

Two in five day visitors with food/beverage/culinary interests *ate lobster/other local seafood* or *ate local food at fairs/festivals* while visiting the region.

- Though *eating lobster or other local seafood* is one of the most popular food/beverage/culinary activities undertaken by day visitors to the Maine Highlands, it is significantly less popular among day visitors to this region than among day visitors to the State as a whole.

Food, Beverage, or Culinary Activities

Base: Those who report food, beverage, or culinary as an interest area for their Maine trip



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

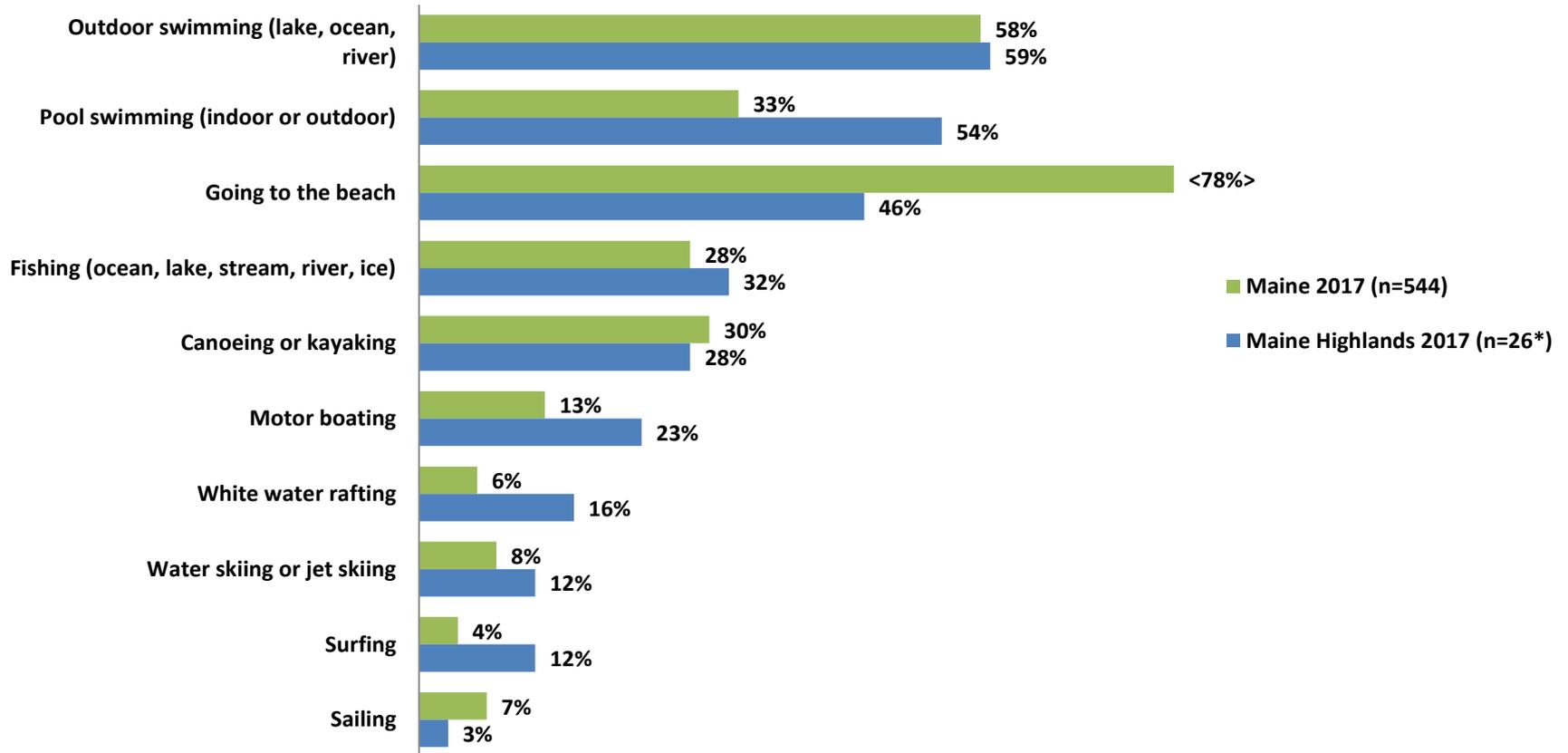
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Swimming and going to the beach are the most common pursuits of day visitors to the region who are interested in water activities.

- Going to the beach is less popular among day visitors to the Maine Highlands, as compared to other parts of the State.

Water Activities

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



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

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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.

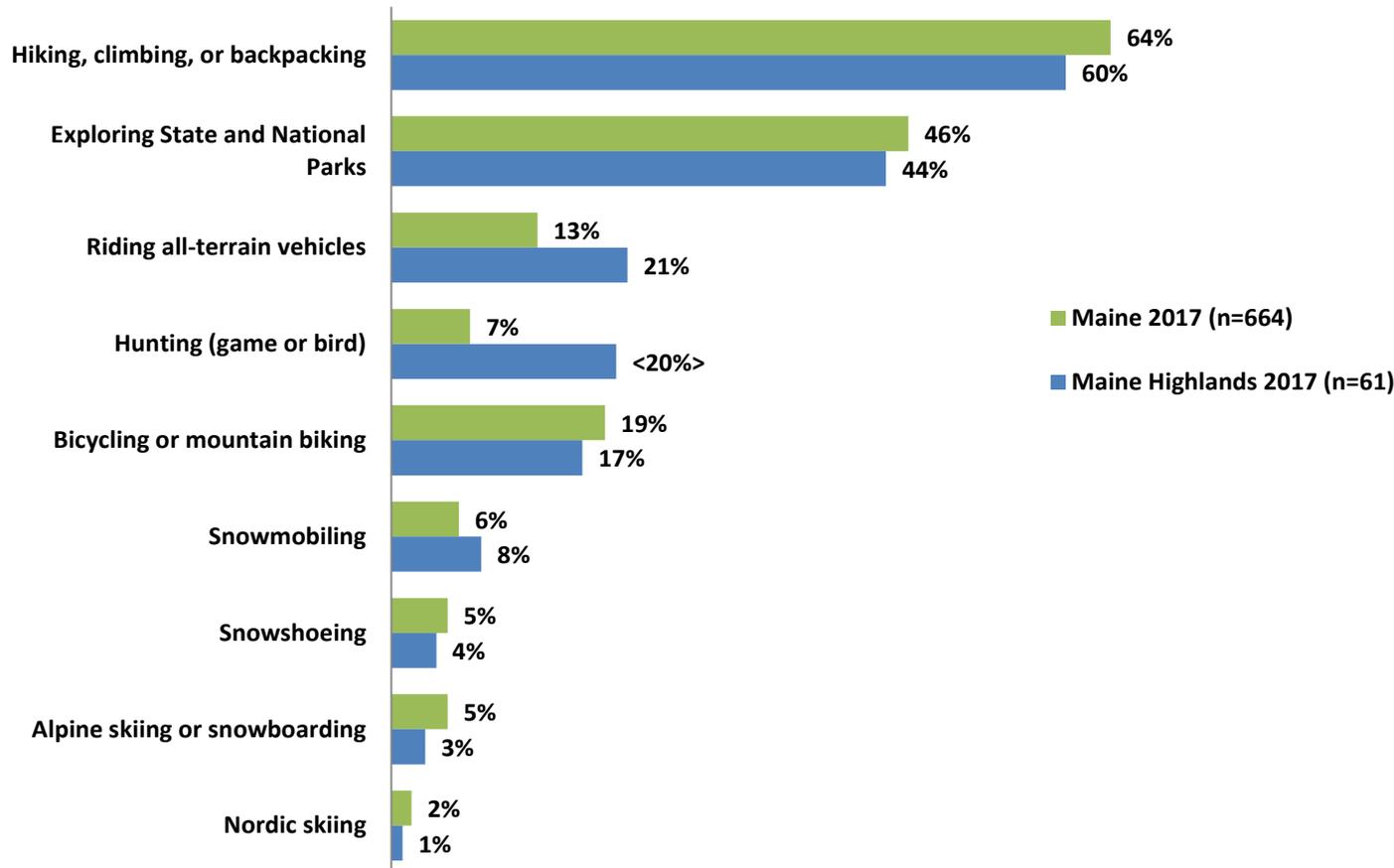
*Please note small sample size. Use caution when interpreting results.

Most Maine Highlands day visitors who are interested in active outdoor activities go *hiking/climbing/backpacking* while in the area.

- *Hunting* is more popular among day visitors to the Maine Highlands, as compared to day visitors to the State as a whole.

Active Outdoor Activities – Non-Water

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

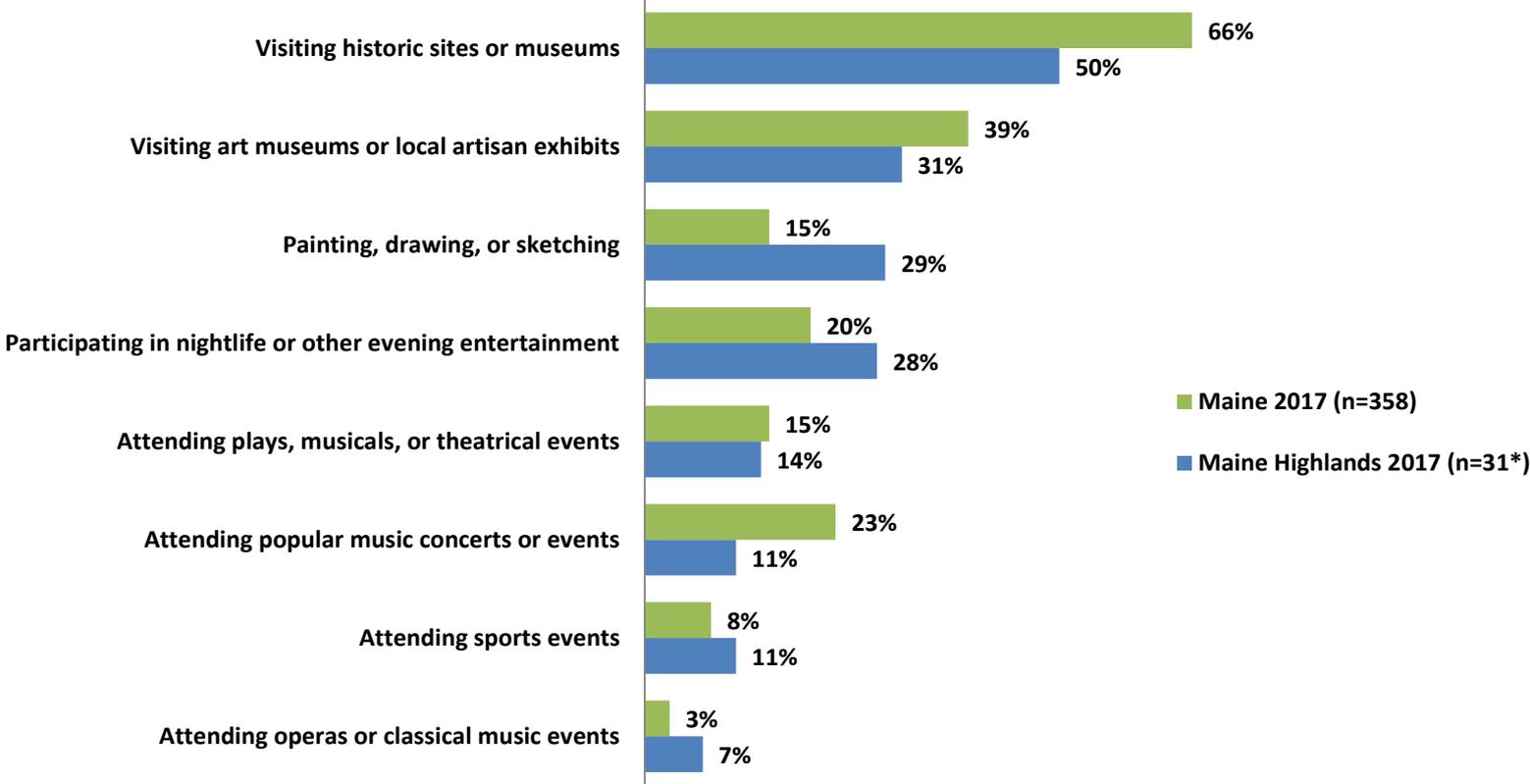
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Half of Maine Highlands visitors interested in history or culture activities *visit historic sites/museums* while in the area.

History or Culture Activities

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State 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.

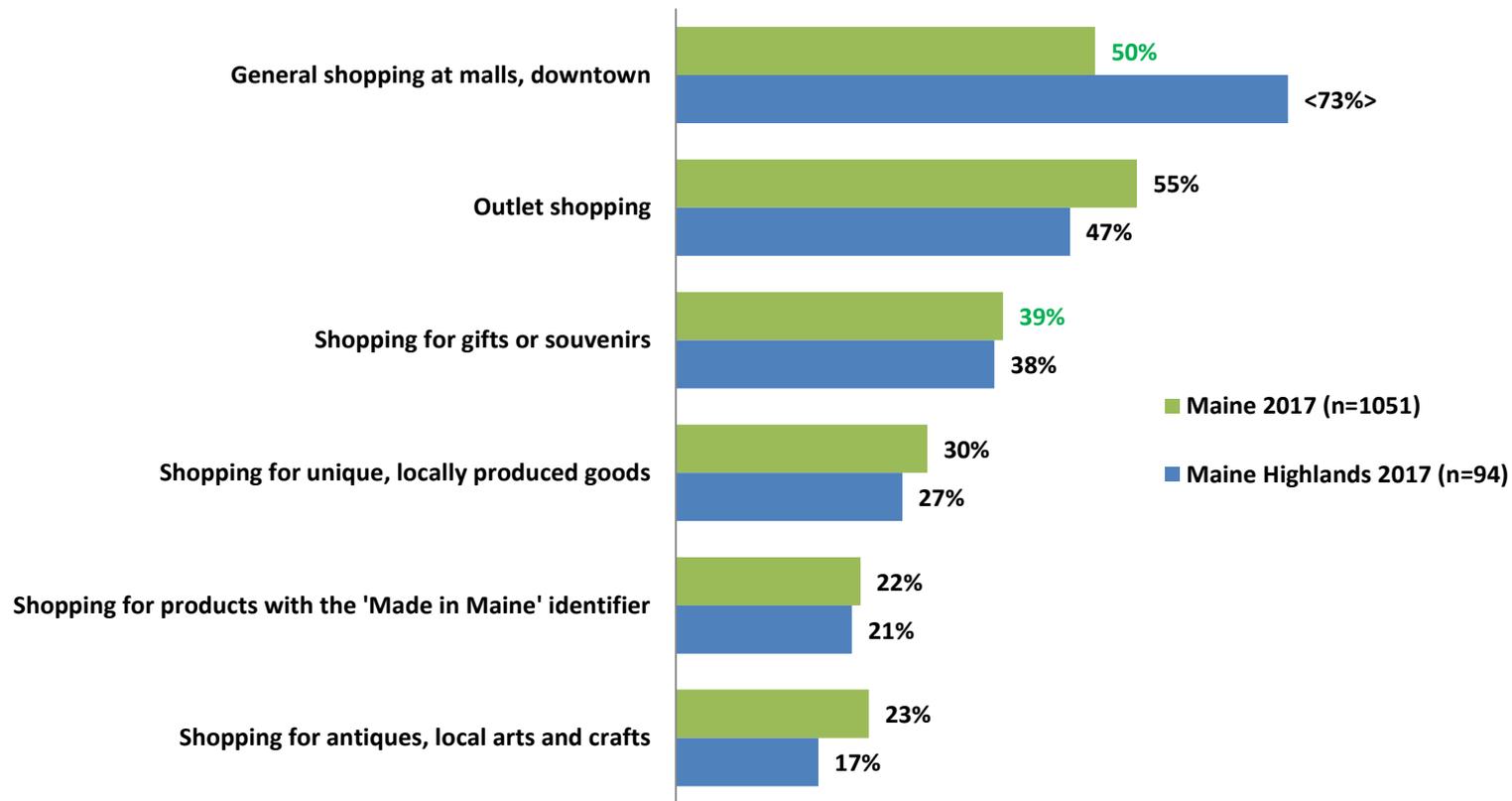
**Please note small sample size. Use caution when interpreting results.*

Among day visitors to this region interested in shopping, three-fourths did some *general shopping at malls/downtown*.

- A greater proportion of day visitors to this region enjoy *general shopping at malls or downtown* than among day visitors to the State overall.

Shopping Activities

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

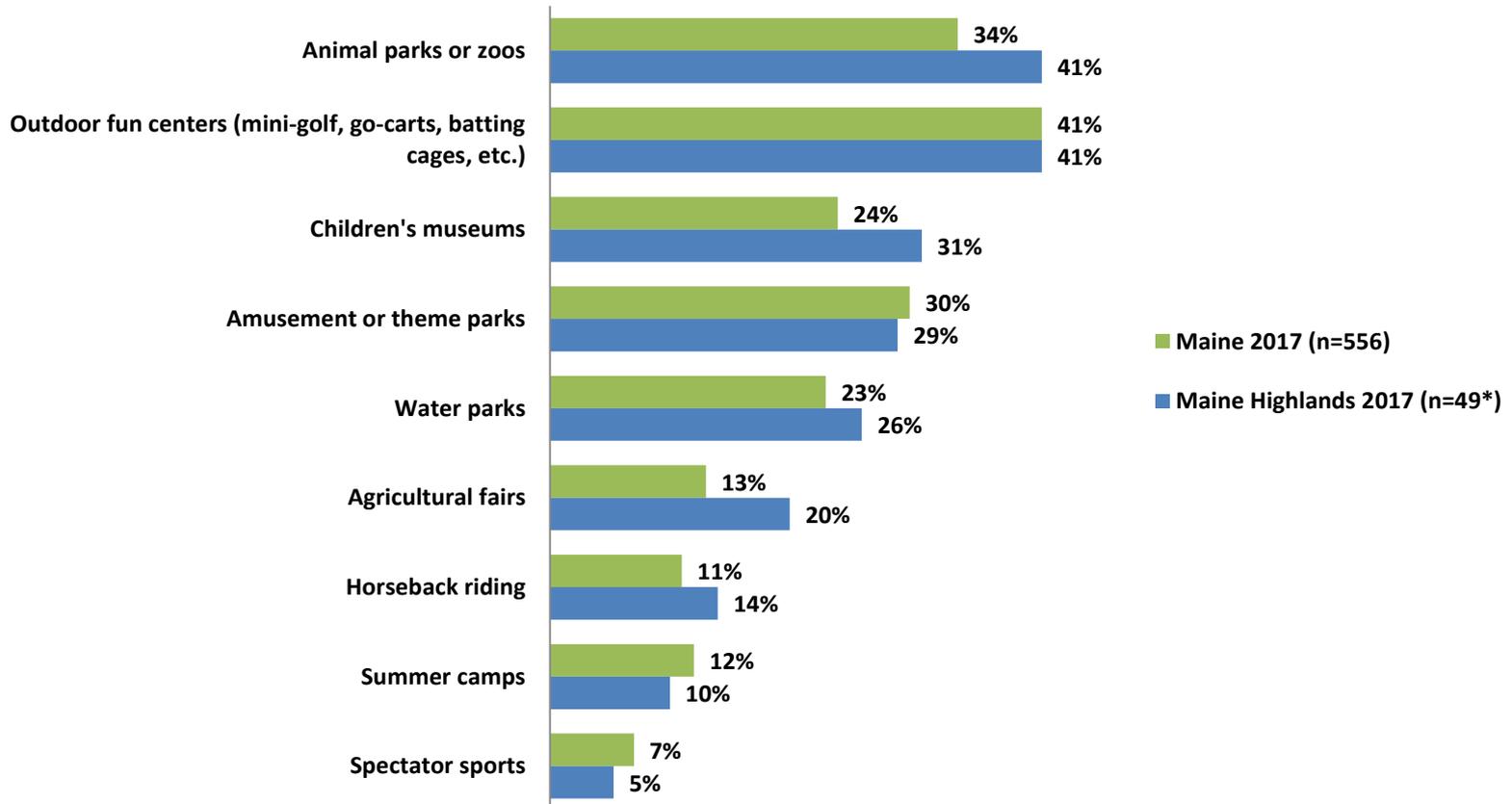
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Animal parks/zoos and outdoor fun centers are the most frequently mentioned activities among day visitors interested in family fun/children’s activities.

Family Fun/Children’s Activities

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



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

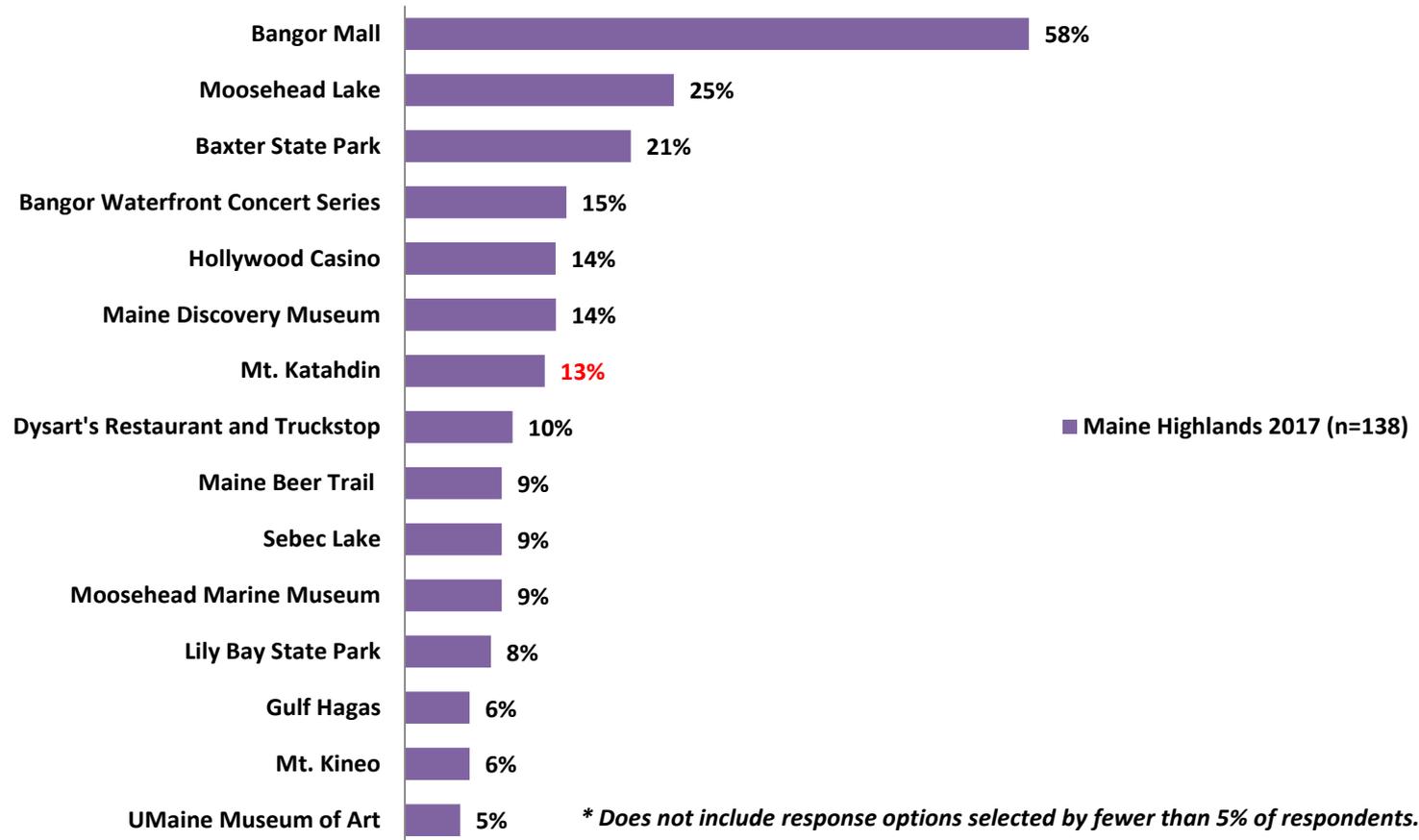
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

*Please note small sample size. Use caution when interpreting results.

Similar to overnight visitors, day visitors to the Maine Highlands region are most likely to have visited the *Bangor Mall*.

Top Attractions/Locations Visited*



Q24: Within the region you visited, what specific towns or cities did you visit? *Please check all that apply.*

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

Comparison of Maine Highlands Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Maine Highlands tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in:
 - Visitor demographics,
 - Visitor origin, and
 - The activities they participate in while visiting.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the entire State, visitors to the Maine Highlands region differ in the following ways:

OVERNIGHT AND DAY VISITORS

A **higher** proportion of visitors from **Canada and Maine**

A **lower** proportion of visitors from the **United States**
(specifically **MA and NH**)

Demographics and Travel Party Composition

OVERNIGHT AND DAY
VISITORS



Younger visitors
Lower annual household
incomes
Less likely to be **married**

OVERNIGHT VISITORS



More likely to be **first-time**
visitors

Trip Interest Areas

OVERNIGHT AND DAY VISITORS

Less likely to want to pursue:
Food/beverage/culinary activities
Water activities

Trip Interest Areas

OVERNIGHT VISITORS



Less likely to want to pursue
touring/sightseeing
activities

DAY VISITORS



More likely to want to **shop**

Trip Interests and Importance (Travel Driver Index)

OVERNIGHT AND DAY VISITORS

Less likely to place importance on
water activities

Trip Interests and Importance (Travel Driver Index)

OVERNIGHT VISITORS

More likely to place
importance on **shopping**

Less likely to place
importance on
touring/sightseeing
activities

Trip Activities

OVERNIGHT AND DAY VISITORS

More likely to be:

Enjoying the **mountain** views

Hunting

Participating in **general shopping**
at malls/downtown

Less likely to be:

Enjoying the **ocean views/rocky coast**

Eating **lobster** or other local
seafood

Going to the **beach**

Trip Activities

OVERNIGHT VISITORS

More likely to be:

Viewing fall colors

Visiting children's museums

Taking tours of local communities

Visiting Farmer's Markets

Fishing

Motor boating

White water rafting

Sailing

Surfing

Alpine skiing/snowboarding

**Less likely to be going to
local brew pubs or craft
breweries**



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