



Maine Office of Tourism

Visitor Tracking Research 2018 Calendar Year Annual Report

Prepared by:



A Division of DRI

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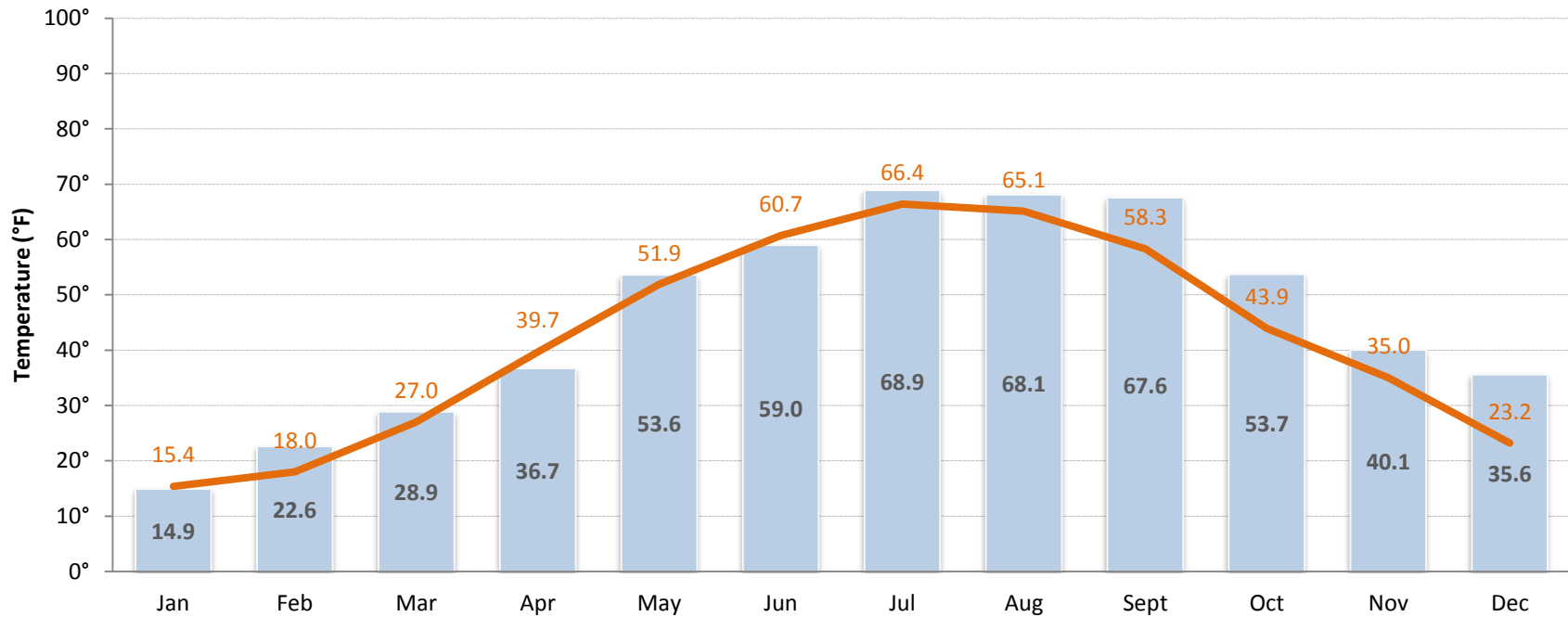


2018 in Context

TEMPERATURE: Maine experienced above average temperatures through most of 2018, with temperatures slightly below average in January, April, and June.

AVERAGE MONTHLY TEMPERATURE – MAINE 2018

■ 2018 Average — 20-year Average

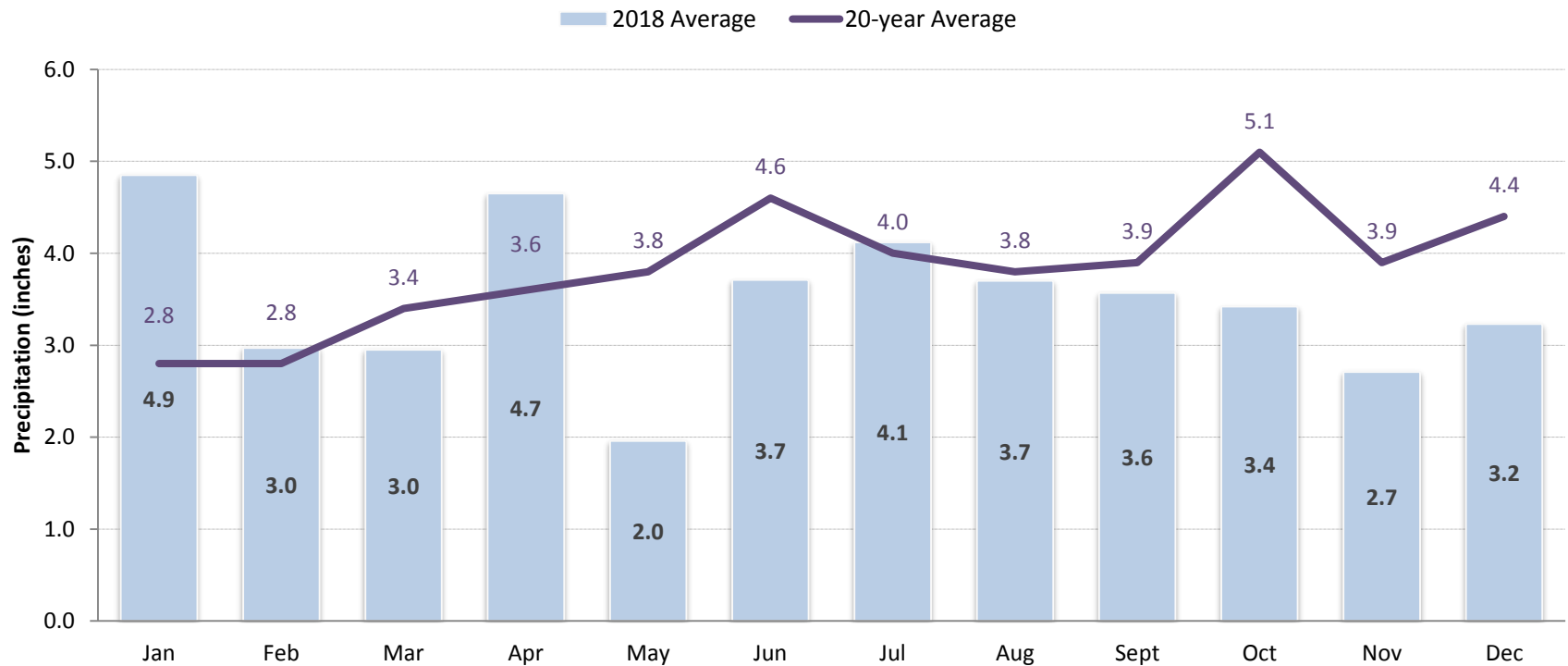


Data source: NOAA.gov

PRECIPITATION: Precipitation in Maine varied from the 20-year average during most of 2018.

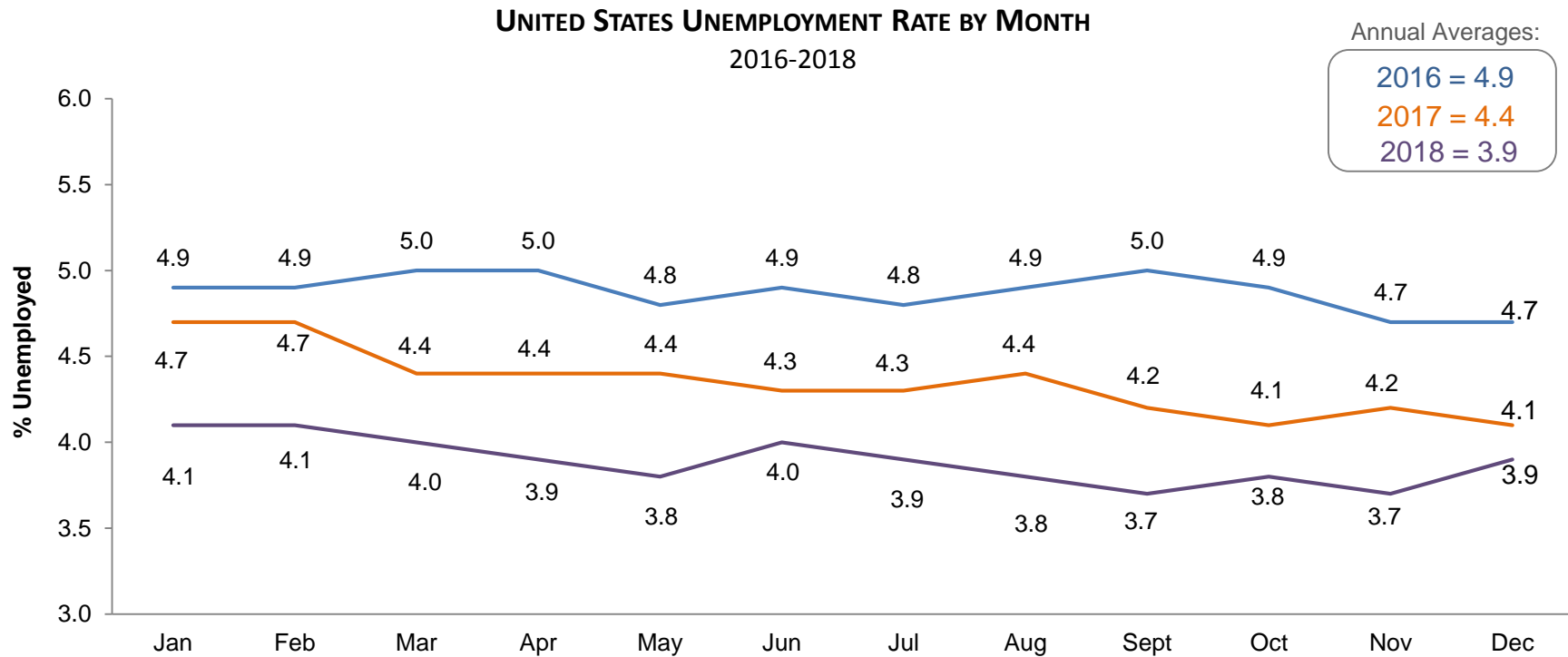
- 2018 brought higher than normal amounts of precipitation in January and April, and average or below average amounts for most of the remaining months.

MONTHLY PRECIPITATION – MAINE 2018



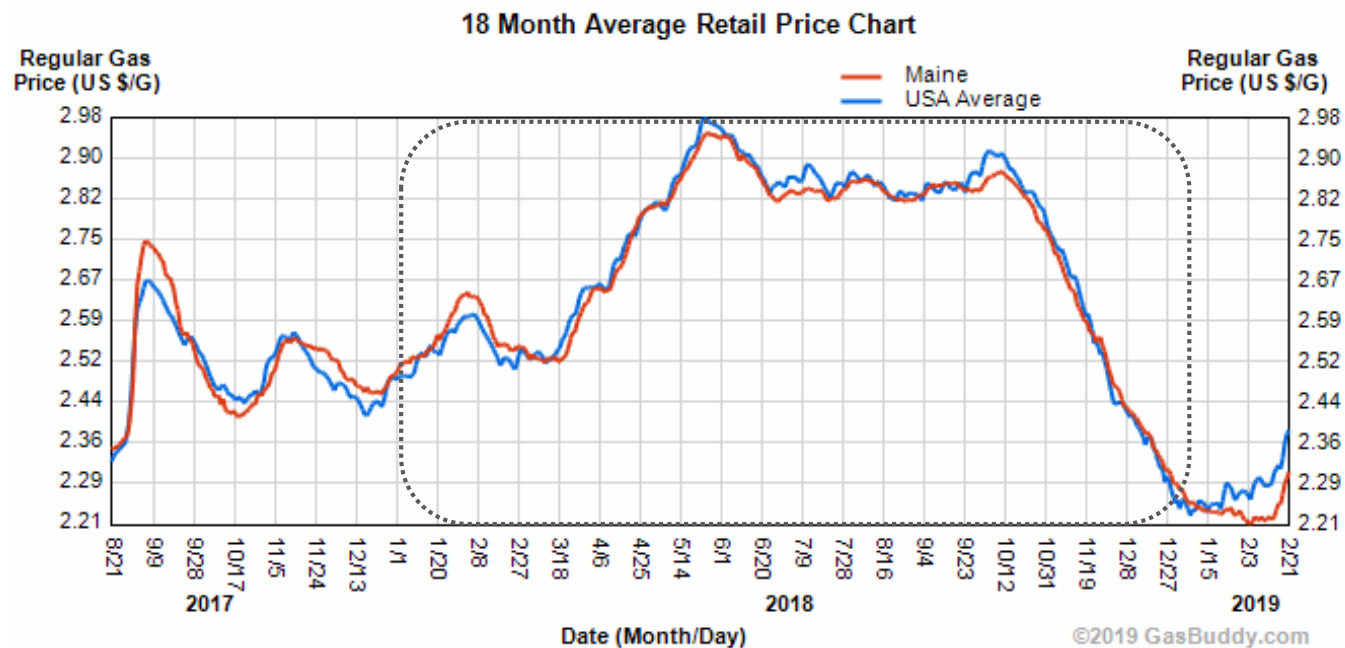
Data source: NOAA.gov

EMPLOYMENT: The national unemployment rate was lower in each month of 2018 than corresponding months in the two prior years.



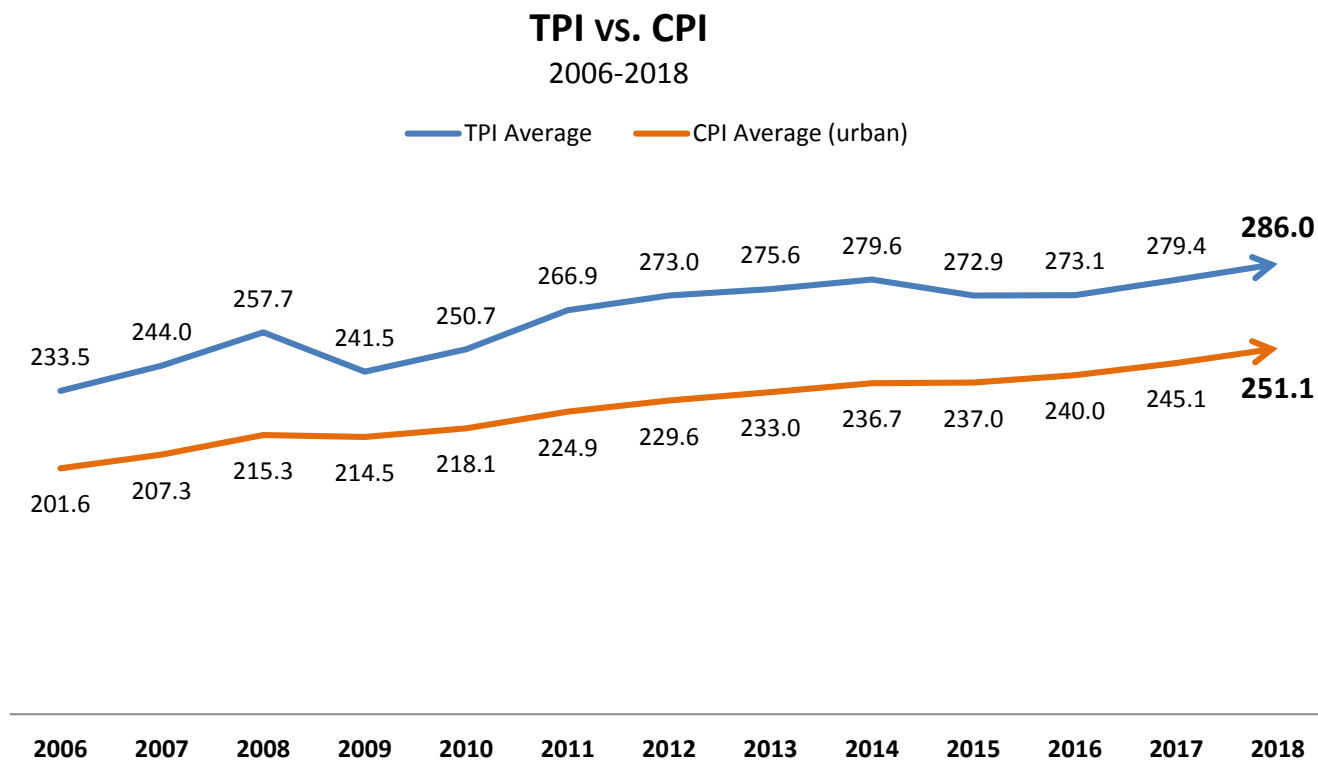
GAS PRICES: In 2018, average gas prices nationwide (\$2.72) were slightly higher than in 2017 (\$2.53).

- Gas prices began a two-month rise in March of 2018, reaching their peak in late May. A sharp decline then began in October.



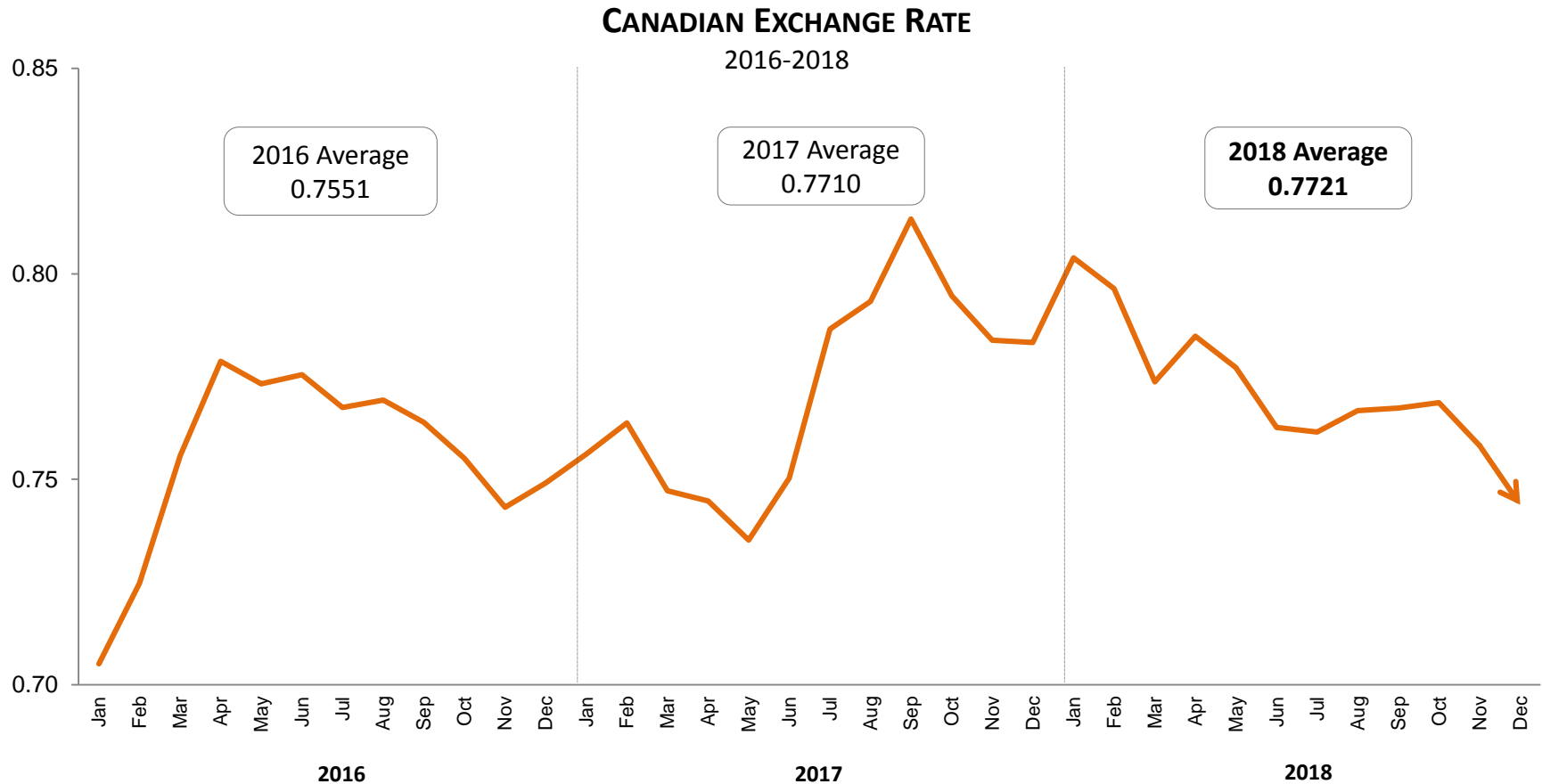
TRAVEL PRICE INDEX: The Travel Price Index* remains higher than the Consumer Price Index, indicating a relatively high cost of travel compared to other types of goods and services.

- The 2018 Travel Price Index continued its two-year increase, reaching its highest level in more than ten years.



*"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

EXCHANGE RATE: 2018 exhibited a continued high cost of travel for Canadians visiting the U.S. On average, Canadians' purchasing power in the U.S. remained on par with 2017.



Summary

Travel Statistics

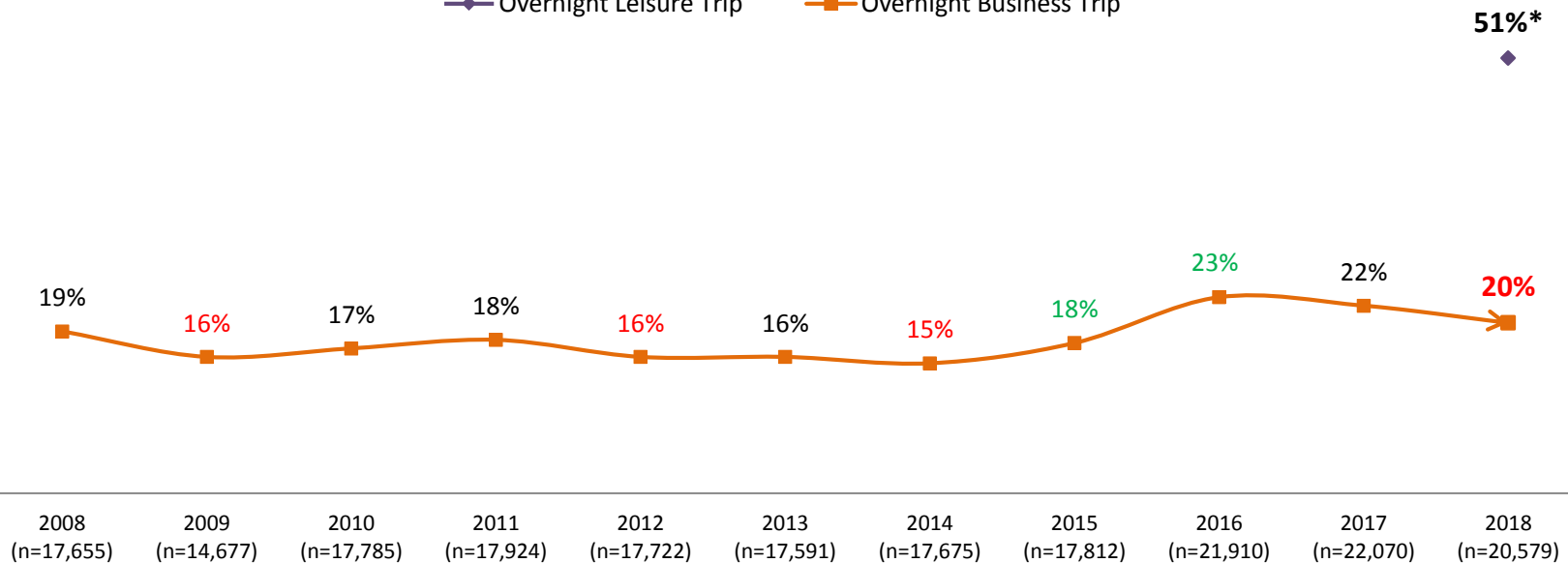


AMERICAN LEISURE AND BUSINESS TRAVEL

- Half of Americans took an overnight leisure trip in 2018.*
- Overnight business travel showed a slight decline from 2017 to 2018.

PROPORTION OF AMERICANS TAKING A TRIP*

— Overnight Leisure Trip — Overnight Business Trip

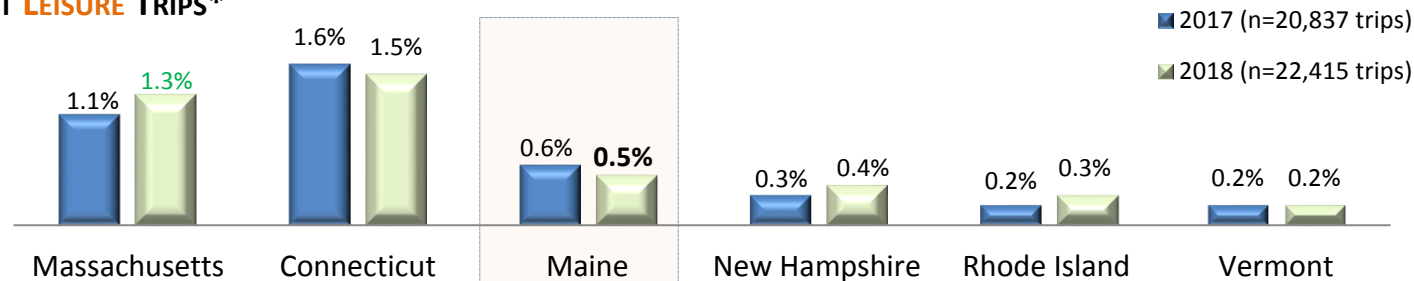


* In 2018, data collection was modified from previous years to measure only leisure travel and business travel, eliminating the separate category of Visiting Friends or Relatives (VFR) travel. Therefore, leisure travel proportions are not directly comparable to prior years' data, as they now include travel to visit friends and relatives.

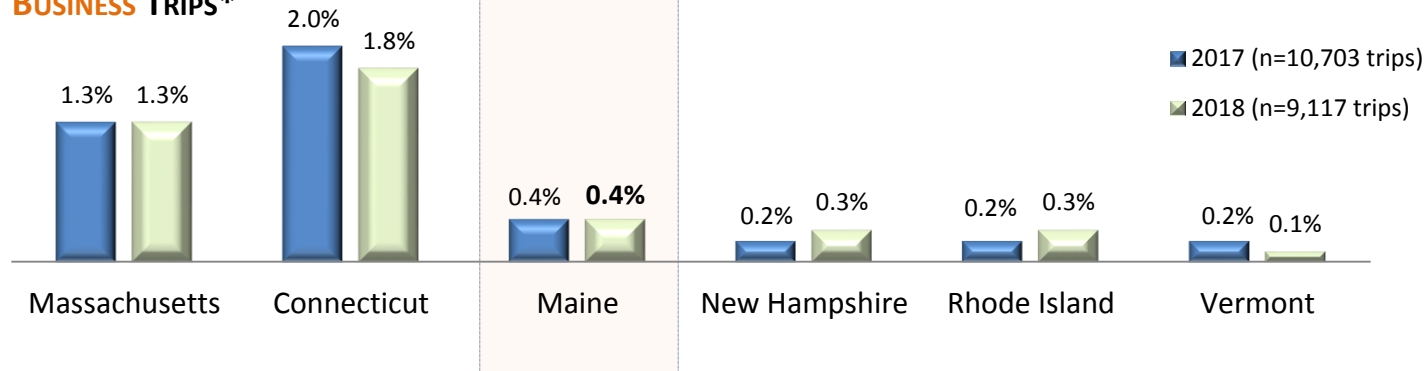
MAINE TRAVEL MARKET SHARE

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

OVERNIGHT LEISURE TRIPS*



OVERNIGHT BUSINESS TRIPS*



*Percentages shown for each state represent the share of total trips taken in 2018.

Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips?

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

MAINE OVERNIGHT VISITATION

- The estimated number of overnight visitors to Maine increased 1.4% in 2018.
- Year-over-year growth was seen during the winter and summer seasons.

TOURISM-RELATED OVERNIGHT VISITATION*

[M=Million; K=Thousands]

	2017 Total	2018			Y/Y % Difference
		Total	Leisure	Business	
NET VISITORS	20.25 M	20.52 M	19.34 M	1.19 M	1.4%
Winter	3.49 M	3.63 M	3.39 M	238 K	3.8%
Summer	10.48 M	11.00 M	10.59 M	410 K	5.0%
Fall	6.28 M	5.90 M	5.36 M	539 K	-6.0%
NET TRIPS	6.81 M	6.72 M	6.31 M	406 K	-1.3%
Winter	1.25 M	1.21 M	1.12 M	80 K	-3.3%
Summer	3.21 M	3.50 M	3.35 M	153 K	9.0%
Fall	2.35 M	2.01 M	1.84 M	172 K	-14.5%

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

- All leisure trips EXCEPT those for a funeral, family reunion, or class reunion.
- Business trips that are for a convention/conference/trade show or training/professional development.

MAINE DAY VISITATION

- The estimated number of day visitors increased 7.3% over 2017.
- Increases during the summer and fall seasons offset a decline in the winter.

TOURISM-RELATED DAY VISITATION*

[M=Million; K=Thousands]

	2017 Total	2018			Y/Y % Difference
		Total	Leisure	Business	
NET Visitors	23.09 M	24.79 M	23.27 M	1.52 M	7.3%
Winter	2.92 M	2.74 M	2.40 M	339 K	-6.1%
Summer	15.78 M	17.27 M	16.40 M	865 K	9.4%
Fall	4.39 M	4.78 M	4.46 M	316 K	8.8%
NET Trips	8.55 M	8.71 M	8.14 M	564 K	1.8%
Winter	1.13 M	1.01 M	891 K	117 K	-10.8%
Summer	5.84 M	5.98 M	5.66 M	320 K	2.4%
Fall	1.58 M	1.72 M	1.59 M	126 K	8.5%

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

- All leisure trips EXCEPT those for a funeral, family reunion, or class reunion.
- Business trips that are for a convention/conference/trade show or training/professional development.

OVERNIGHT VISITOR SPENDING: Overnight visitor spending averaged just over \$1,000 per travel party, with the highest proportion spent on *lodging*.

- Following a decline from 2016 to 2017, overnight visitor spending increased in 2018, rebounding to previous spending levels.
- Business travelers continue to spend more, on average, than leisure travelers.

AVERAGE TRIP SPENDING PER TRAVEL PARTY – OVERNIGHT VISITORS*

	2017 Total (n=2922)	2018 Total (n=2901)	2018 Leisure (n=2236)	2018 Business (n=665)
<i>Overnight Travel Spending:</i>				
Total Net Spending	\$854	\$1030	\$973	<\$1223>
Lodging	\$491	\$525	\$493	<\$618>
<i>% of travelers spending</i>	<i>76%</i>	<i>82%</i>	<i>79%</i>	<i><91%></i>
Food	\$225	\$251	\$248	\$260
<i>% of travelers spending</i>	<i>93%</i>	<i>96%</i>	<i><97%></i>	<i>93%</i>
Retail Goods	\$179	\$207	\$197	<\$240>
<i>% of travelers spending</i>	<i>64%</i>	<i>75%</i>	<i>75%</i>	<i>74%</i>
Transportation	\$123	\$157	\$147	<\$195>
<i>% of travelers spending</i>	<i>90%</i>	<i>91%</i>	<i><93%></i>	<i>84%</i>
Recreation	\$114	\$129	\$128	\$132
<i>% of travelers spending</i>	<i>46%</i>	<i>54%</i>	<i><52%></i>	<i>59%</i>

*Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category.

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

- Day visitor spending in 2018 is not significantly different from 2017 spending. The one exception is spending on *transportation*, which increased slightly in 2018.

AVERAGE TRIP SPENDING PER TRAVEL PARTY – DAY VISITORS*

	2017 Total (n=1782)	2018 Total (n=1756)	2018 Leisure (n=1429)	2018 Business (n=327)
<i>Day Travel Spending:</i>				
Total Net Spending	\$303	\$306	\$301	\$327
Retail Goods	\$129	\$123	\$122	\$127
<i>% of travelers spending</i>	68%	70%	69%	71%
Food	\$127	\$126	\$124	\$135
<i>% of travelers spending</i>	96%	96%	96%	95%
Recreation	\$76	\$73	\$73	\$73
<i>% of travelers spending</i>	54%	50%	48%	<59%>
Transportation	\$68	\$75	\$74	\$82
<i>% of travelers spending</i>	96%	97%	97%	96%

*Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category.

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

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

Maine Traveler Expenditures

- In 2018, visitors spent more than \$6.2 billion in Maine. That's an increase of 3% – amounting to roughly \$200 million – over 2017.
- Lodging, food, and retail sales continue to comprise the highest proportions of visitor spending.

DIRECT TOURISM EXPENDITURES TOURISM-RELATED TRIPS \$ Millions

Direct Tourism Expenditures Tourism Related Trips*	Total 2017	Total 2018	Winter	2018 Summer	Fall	Y/Y % Difference
NET Spending	\$6,010	\$6,200	\$970	\$3,410	\$1,820	3.2%
Lodging	\$1,760	\$1,780	\$280	\$980	\$520	1.3%
Restaurant/Food	\$1,600	\$1,640	\$260	\$900	\$480	2.8%
Retail Sales	\$1,520	\$1,570	\$250	\$870	\$460	3.7%
Recreation	\$620	\$630	\$100	\$350	\$190	2.7%
Gasoline	\$470	\$520	\$80	\$290	\$150	10.4%
Transportation	\$50	\$50	\$10	\$30	\$10	0.1%

*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 EXCEPT those for a funeral, family reunion, or class reunion.
- Business trips that are for a convention/conference/trade show or training/professional development.

OVERNIGHT VISITORS





Overnight Trip Planning

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

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

SOURCES USED:	2018 TOTAL (n=2,901)	Leisure (n=2,236) [a]	Business (n=665) [b]	Paid Accommodations (n=2,115) [c]	Unpaid Accommodations (n=786) [d]
The Internet	65%	67% b	57%	70% d	49%
Friends/relatives/co-workers' advice	45%	48% b	34%	39%	60% c
Social Media such as Facebook, Twitter, etc.	27%	25%	33% a	28%	25%
Travel guides/brochures	16%	15%	21% a	19% d	10%
Travel planning apps	16%	14%	23% a	18% d	9%
AAA	12%	11%	17% a	13% d	10%
Travel books	11%	8%	18% a	12% d	6%
Travel magazines	11%	10%	18% a	13% d	7%
State tourism office	9%	7%	13% a	10% d	5%
Local convention and visitors bureaus	8%	5%	15% a	8% d	6%
Articles or travelogues	8%	7%	12% a	9% d	5%
Travel agent	8%	4%	21% a	9% d	5%
Local Chambers of Commerce	5%	4%	9% a	5% d	3%
Other	5%	6% b	2%	3%	11% c
AVERAGE # OF SOURCES CONSULTED	2.5	2.3	2.9 a	2.6 d	2.1

Q21. When you were planning this recent trip in Maine, which of the following sources did you use?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Certain groups of travelers consulted a greater number of sources when planning their overnight trip as compared to their counterparts.

- **Balanced Achievers** 2.8 sources vs. 2.3 for Genuine Originals & Social Sophisticates
- **Travelers under the age of 35** 2.6 sources vs. 2.3 for those 35 and older
- **Mid-Atlantic residents** 2.7 sources vs. 1.9 for Maine residents and 2.2 for New England residents
- **Visitors traveling w/children** 2.7 sources vs. 2.4 for those traveling w/out children
- **First-time visitors** 2.8 sources vs. 2.3 for repeat visitors



Q21. When you were planning this recent trip in Maine, which of the following sources did you use?

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

As might be expected, the usage of various planning resources for overnight trips has changed across the years.

- Travelers' usage of the Internet, advice of family/friends, and social media for overnight trip planning has remained relatively stable over the past few years, while the usage of more traditional planning resources has fluctuated somewhat.

Sources Used:	2018 (n=2,901)	2017 (n=2,922)	2016 (n=2,909)	2015 (n=2,779)	2014 (n=2,930)	2013 (n=2,675)	2012 (n=2,497)	2011 (n=2,954)	2010 (n=2,992)	2009 (n=3,057)	2008 (n=3,320)
The Internet	65%	64%	62%	65%	64%	64%	63%	65%	66%	66%	66%
Friends/relatives/co-workers' advice	45%	45%	46%	44%	45%	34%	35%	42%	42%	43%	49%
Social Media	27%	24%	24%	20%	18%	10%	8%	n/a	n/a	n/a	n/a
Travel guides/brochures	16%	14%	17%	20%	17%	12%	13%	15%	14%	16%	15%
Travel planning apps	16%	13%	15%	14%	11%	n/a	n/a	n/a	n/a	n/a	n/a
AAA	12%	13%	16%	18%	16%	16%	18%	20%	20%	20%	21%
Travel magazines	11%	7%	11%	13%	12%	9%	8%	8%	9%	9%	n/a
Travel Books	11%	8%	12%	11%	10%	9%	8%	10%	10%	11%	13%
State tourism office	9%	8%	11%	12%	11%	n/a	n/a	n/a	n/a	n/a	n/a
Articles or travelogues	8%	5%	7%	8%	7%	7%	7%	7%	7%	8%	n/a
Contact local convention/visitors bureaus	8%	6%	7%	7%	6%	5%	5%	5%	5%	5%	4%
Travel agent	8%	5%	7%	6%	5%	4%	0%	4%	6%	6%	5%
Contact local Chambers of Commerce	5%	4%	4%	6%	5%	6%	0%	4%	4%	5%	4%

Q21. When you were planning this recent trip in Maine, which of the following sources did you use?

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

TripAdvisor, Google Maps, and various online search engines remain the top overnight trip planning websites used.

- VisitMaine.com and Maine tourism region websites remain among the top websites used for planning trips to Maine.

TOP WEBSITES USED Base: Visitors Who Used the Internet When Planning their Trip to Maine		OTHER WEBSITES USED Base: Visitors Who Used the Internet When Planning their Trip to Maine	
	2018 TOTAL (n=2,069)		2018 TOTAL (n=2,069)
TripAdvisor	39%	DiscoverNewEngland.com	7%
Google maps	38%	Airline websites	6%
Online search engines	34%	Chambers of Commerce websites	4%
Facebook	31%	Convention and/or visitor bureau websites	4%
VisitMaine.com	30%	Zagat	3%
Booking websites	26%	LonelyPlanet	3%
Maine tourism region websites (NET)	25%	Tripit	2%
Youtube	22%	Fodors	2%
Lodging/hotel/accommodation websites	19%	Frommers	2%
Google+	17%	Jetsetter	2%
Mainetourism.com	14%	Vimeo	2%
Travel blogs	10%	igougo	1%
Twitter	8%	Other	3%

Q22. Which of the following websites did you visit when planning this trip in Maine?

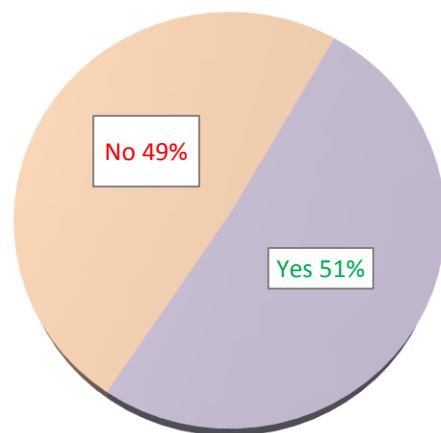
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Half of Maine's overnight visitors used a peer-to-peer or shared network to book either lodging or transportation for their trip.

- This represents an increase in the proportion of overnight visitors using a shared network, compared to last year (45%).
- Airbnb is the most utilized shared network for lodging, while Uber is the most popular transportation network.

USED PEER-TO-PEER NETWORK
(n=2,901)



PEER-TO-PEER NETWORKS USED

**2018
TOTAL**
(n=2,901)

Any (NET)	51%
<u>Lodging (NET)</u>	46%
Airbnb	25%
VRBO (Vacation Rentals by Owner)	7%
One Fine Stay	5%
Flipkey	4%
Other lodging	11%
<u>Transportation (NET)</u>	41%
Uber	24%
Lyft	9%
Sidecar	3%
Other transportation	11%

Certain groups of travelers are more apt than their counterparts to use shared networks:

- Visitors from the **Mid-Atlantic** region
- Travelers **younger than 45** years old
- **Balanced Achievers**
- **Business** travelers
- **First-time** visitors
- Visitors staying in **paid accommodations**
- Travelers earning **\$150k or more**

Two-thirds of Maine's overnight visitors did not consider other vacation destinations when planning their trip.

- Of the 31% who did consider other destinations, the most frequently considered destinations included New Hampshire and Vermont.
- 2018 saw an increase in the proportion of overnight visitors who considered other destinations for a trip that they ultimately took to Maine (31%, versus 23% in 2017).

OTHER DESTINATIONS CONSIDERED	2018 (n=2,901)
<u>Didn't consider other destinations</u>	65%
<u>Considered other destinations (NET)</u>	31%
New Hampshire	10%
Vermont	8%
Massachusetts	5%
New York	4%
Rhode Island	3%
Florida	2%
Connecticut	2%
California	1%
Nova Scotia	1%

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

Mid-Atlantic (n=1,300) <34%>	Maine, New England (n=1191) 28%
First-time Visitors (n=766) <35%>	Repeat Visitors (n=2135) 30%
Paid Accommodations (n=2,115) <34%>	Unpaid Accommodations (n=786) 24%
Kids on Trip (n=960) <36%>	No Kids (n=1941) 29%

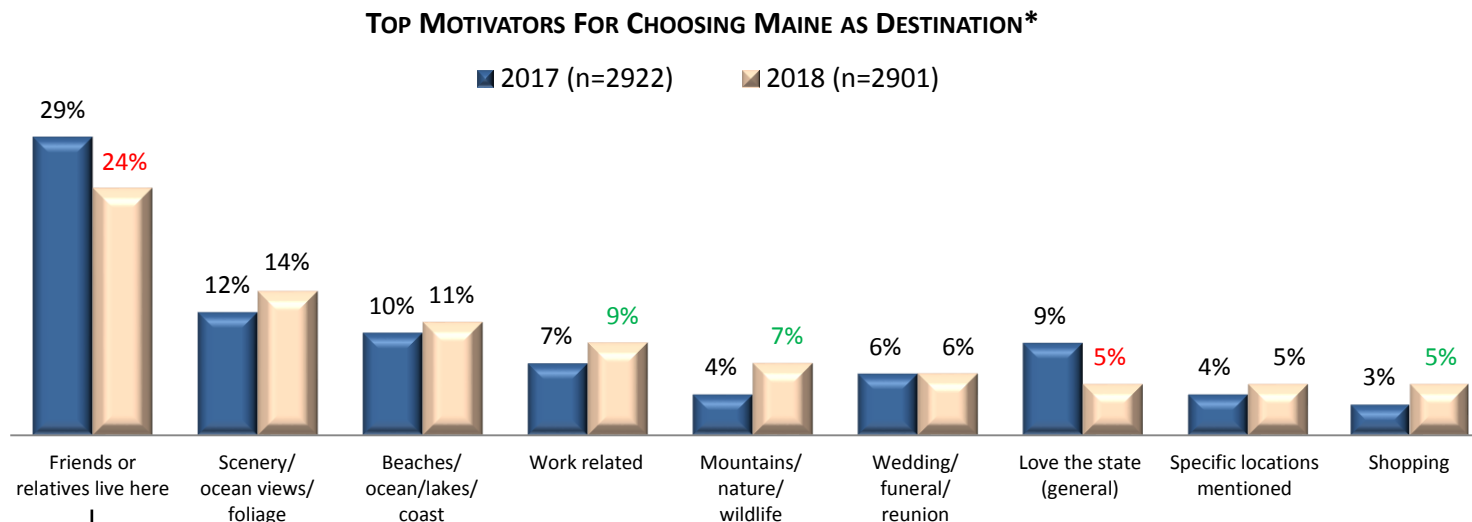
Q16. What other states or provinces, if any, did you consider for this specific trip?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

The presence of friends or relatives in Maine remains the top motivator for selecting Maine as a vacation destination.

- Maine's beautiful scenery and its beaches and lakes are the next most common motivators for visiting.



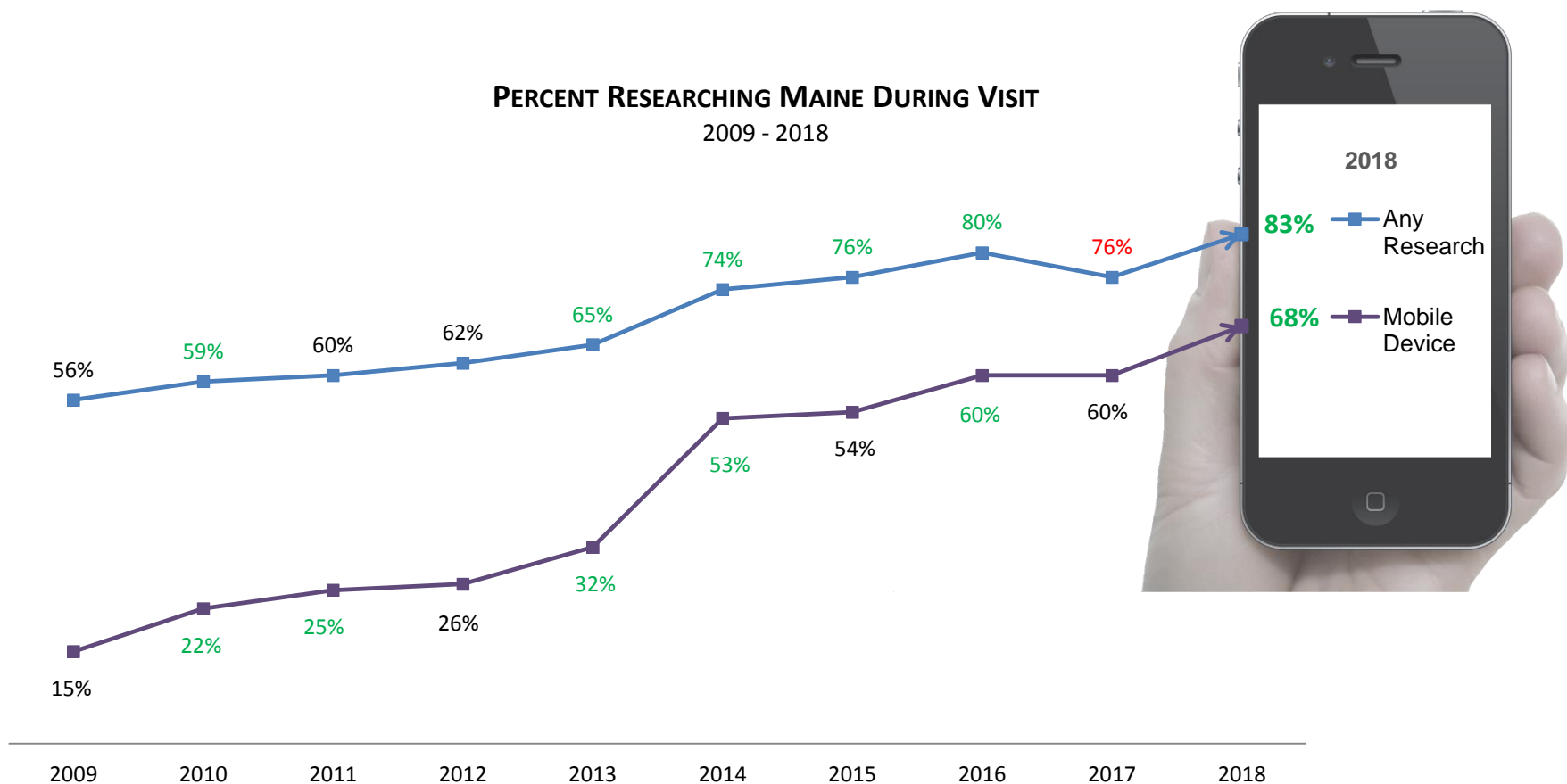
Those more likely to say they chose Maine because friends/relatives live there include:

- Repeat visitors
- Those earning less than \$75,000/year
- Americans

* Only responses mentioned by at least 5% of travelers are listed.

The proportion of visitors continuing to research Maine while on their trip increased in 2018, after experiencing a drop in 2017.

- Likewise, the proportion using a mobile device to conduct research about Maine increased significantly.



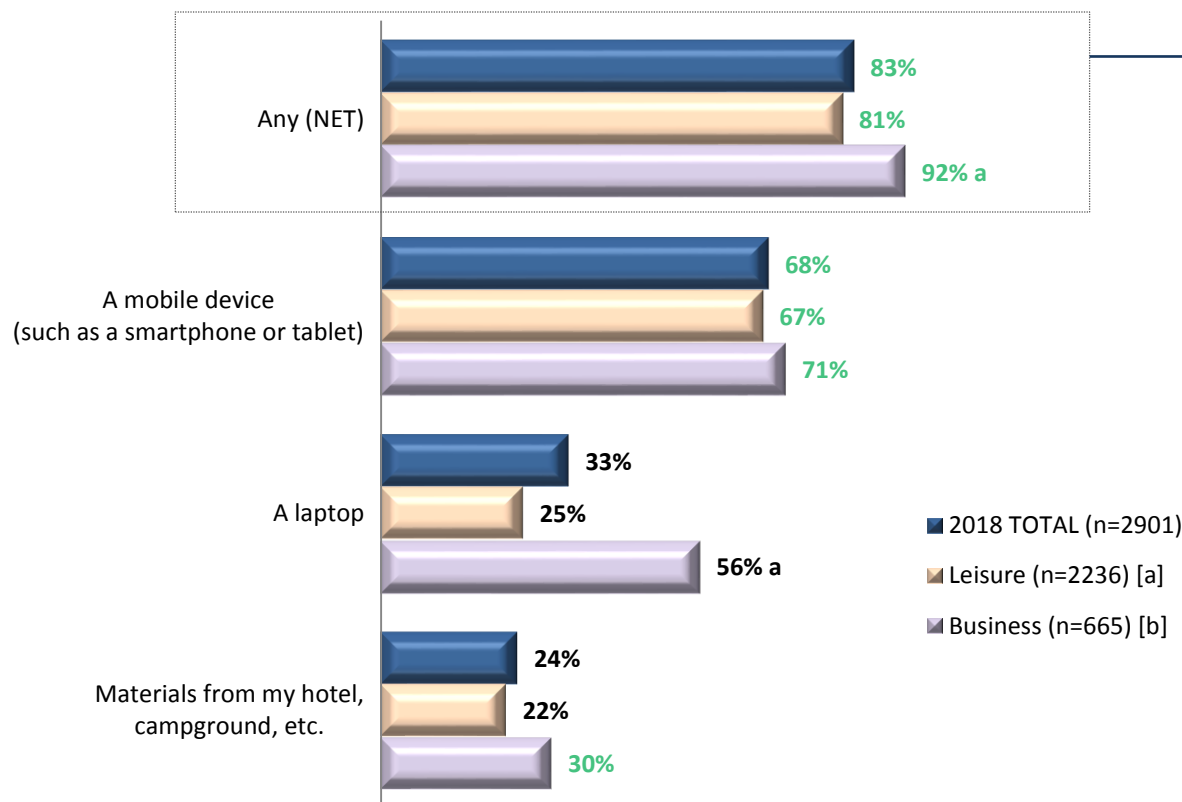
Q30. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit?

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

Four out of five overnight travelers continued to research Maine after arriving for their trip, particularly business travelers.

- Seven out of ten travelers reported using a mobile device (smartphone or tablet) to continue researching places to go or things to do in Maine while visiting. Fewer reported using a laptop or materials from their hotel or campground.

TRIP RESEARCH WHILE IN MAINE



Those more likely than their counterparts to continue researching Maine while visiting:

- First-time Visitor
- Paid accommodations
- Kids on trip
- <45 years of age
- Americans
- Balanced Achievers



Overnight Visitor Travel Logistics

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

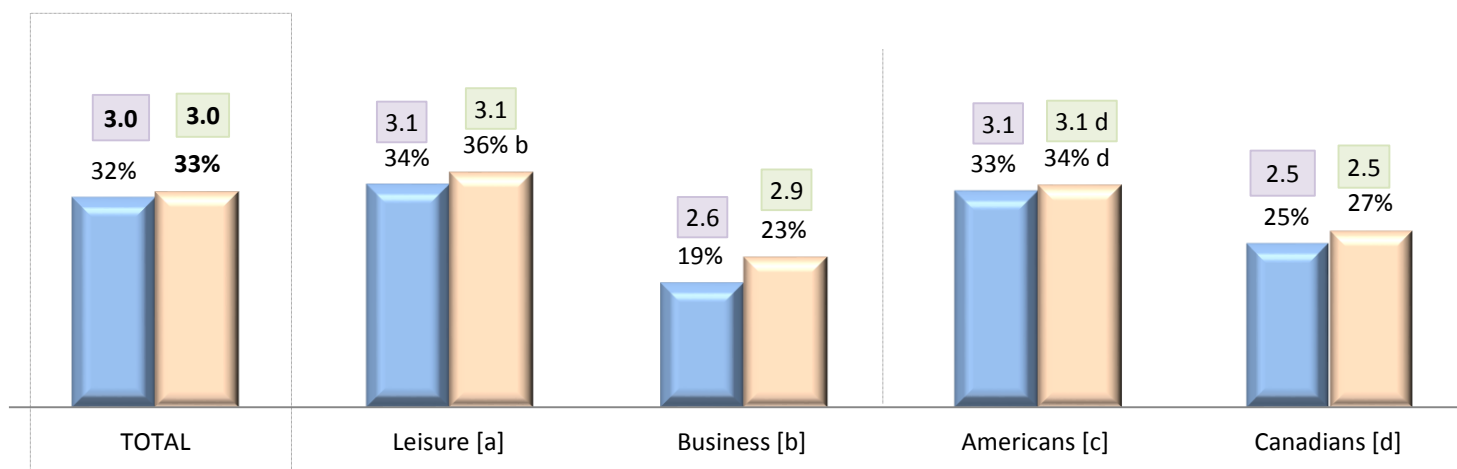
- Predictably, leisure travelers were more likely to be traveling with kids than were business travelers.
- American visitors were also more likely to be traveling with kids than were Canadian visitors.
- Overnight visitors between the ages of 35 and 44 and those traveling during the Winter or Summer seasons were also more likely to be visiting Maine with children (not shown).

TRAVEL PARTY SIZE AND COMPOSITION

■ % Traveling with Children 2017 ■ % Traveling with Children 2018

Avg. Party Size 2017
n=2,922

Avg. Party Size 2018
n=2,901



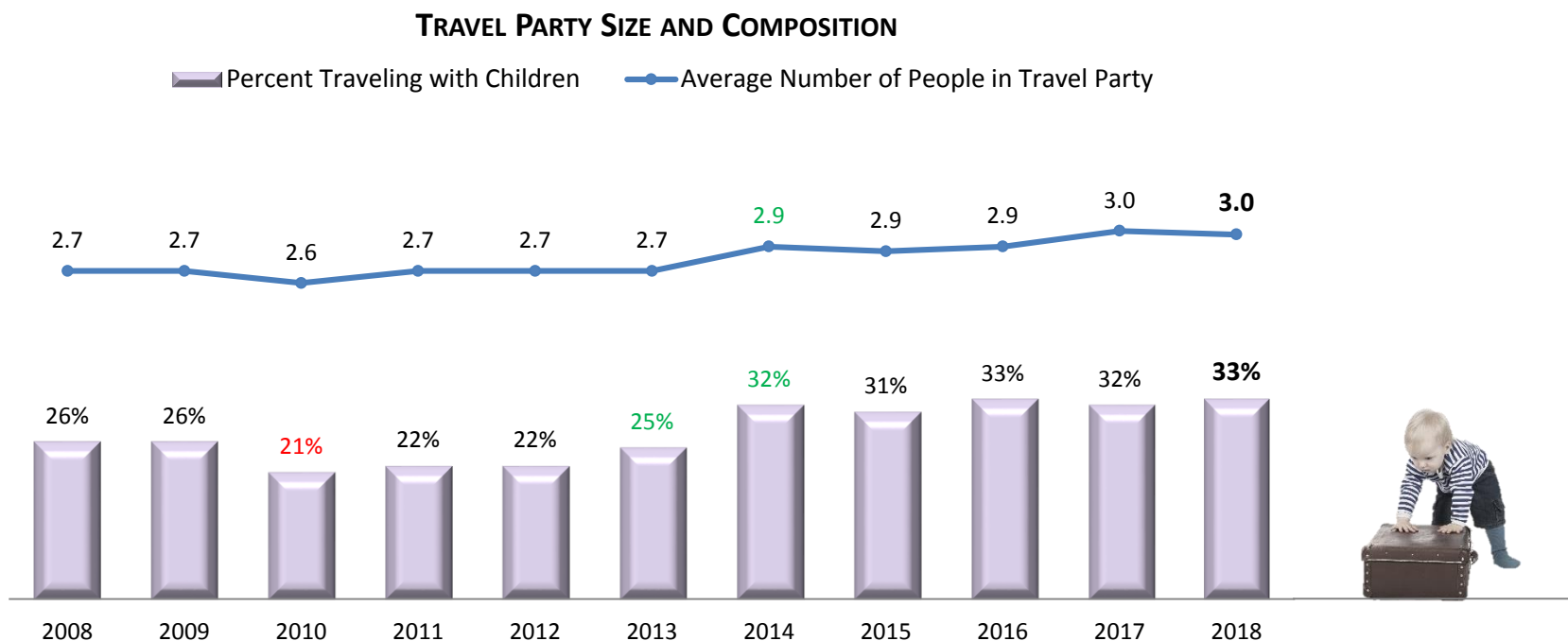
Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q25. How many of these people were: Children?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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The proportion of overnight visitors traveling with children and the average travel party size have remained consistent over the last four years.



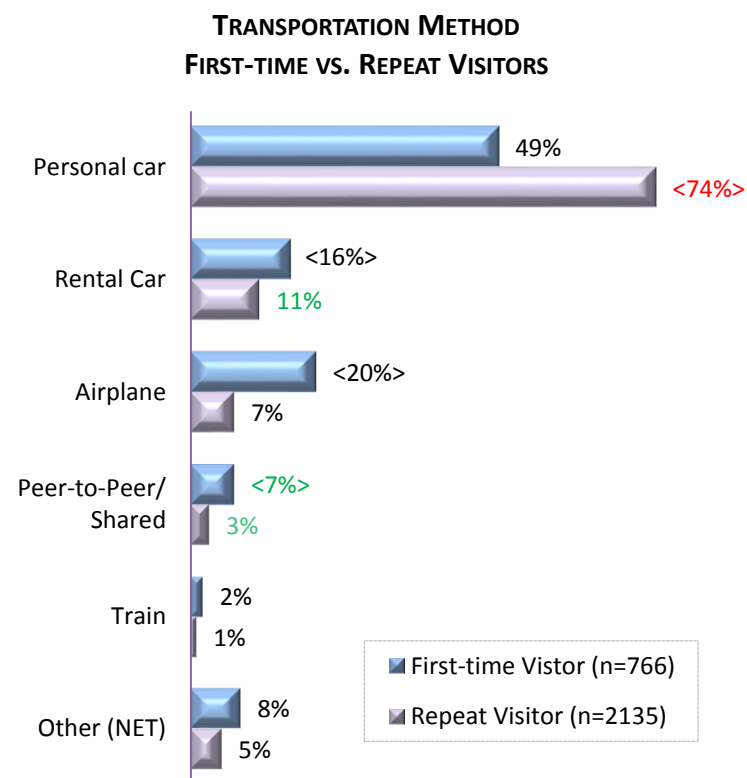
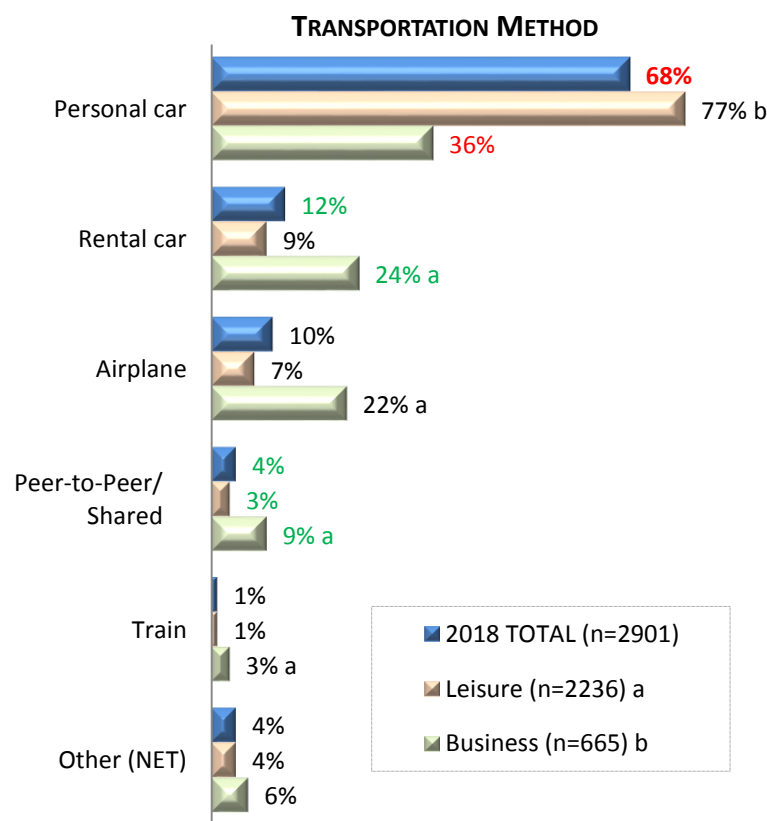
Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q22. How many of these people were: Children?

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

Two-thirds of overnight visitors used their personal car to travel to Maine.

- Leisure travelers and repeat visitors were more likely to use their personal car to travel to Maine, while business travelers and first-time visitors were more likely to drive a rental car or fly to Maine.
- Not shown, Americans (particularly residents of Maine and New England) were more likely to drive their personal car to Maine. Canadians and Mid-Atlantic residents were more likely to have used a rental car.



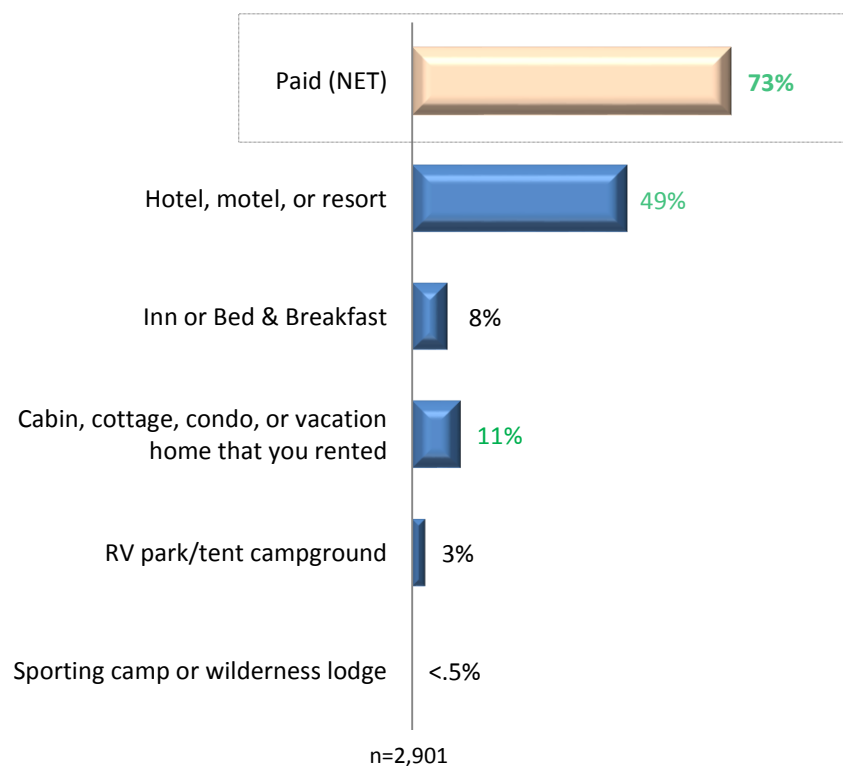
Q26. Which of the following types of transportation did you use to travel the most miles from your home to get to your Maine destination? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

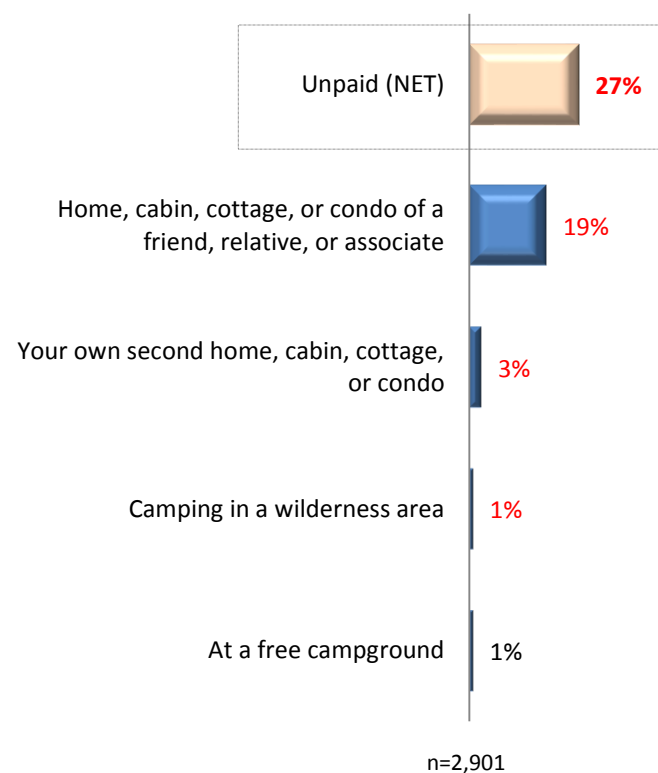
Three-fourths of Maine's overnight visitors stayed in paid accommodations while visiting in 2018, primarily in hotels/motels/resorts.

- 2018 saw an increase in the proportion of overnight visitors staying in paid accommodations (73%, versus 63% in 2017), with increases seen in both hotels/motels/resorts and cabins/cottages/vacation homes.

PAID ACCOMMODATIONS 2018



UNPAID ACCOMMODATIONS 2018



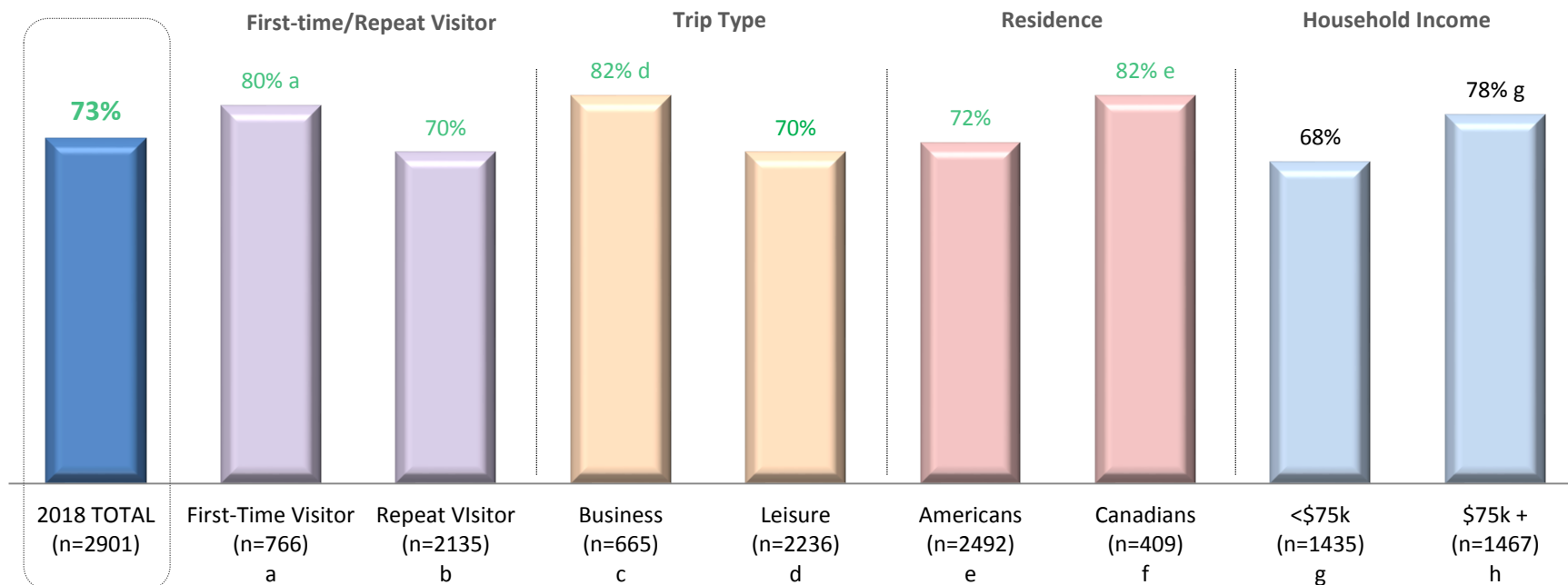
Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

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

Certain groups of travelers were more likely to stay in paid accommodations while visiting Maine.

- Overnight visitors more likely than their counterparts to stay in paid accommodations when visiting Maine included: first-time visitors, business travelers, Canadian visitors, and travelers with household incomes of \$75,000 or more.
- Not shown below, Summer season visitors (75%) were more likely to stay in paid accommodations as compared to Fall (70%) and Winter (71%) visitors.

% STAYING IN PAID ACCOMMODATIONS



Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

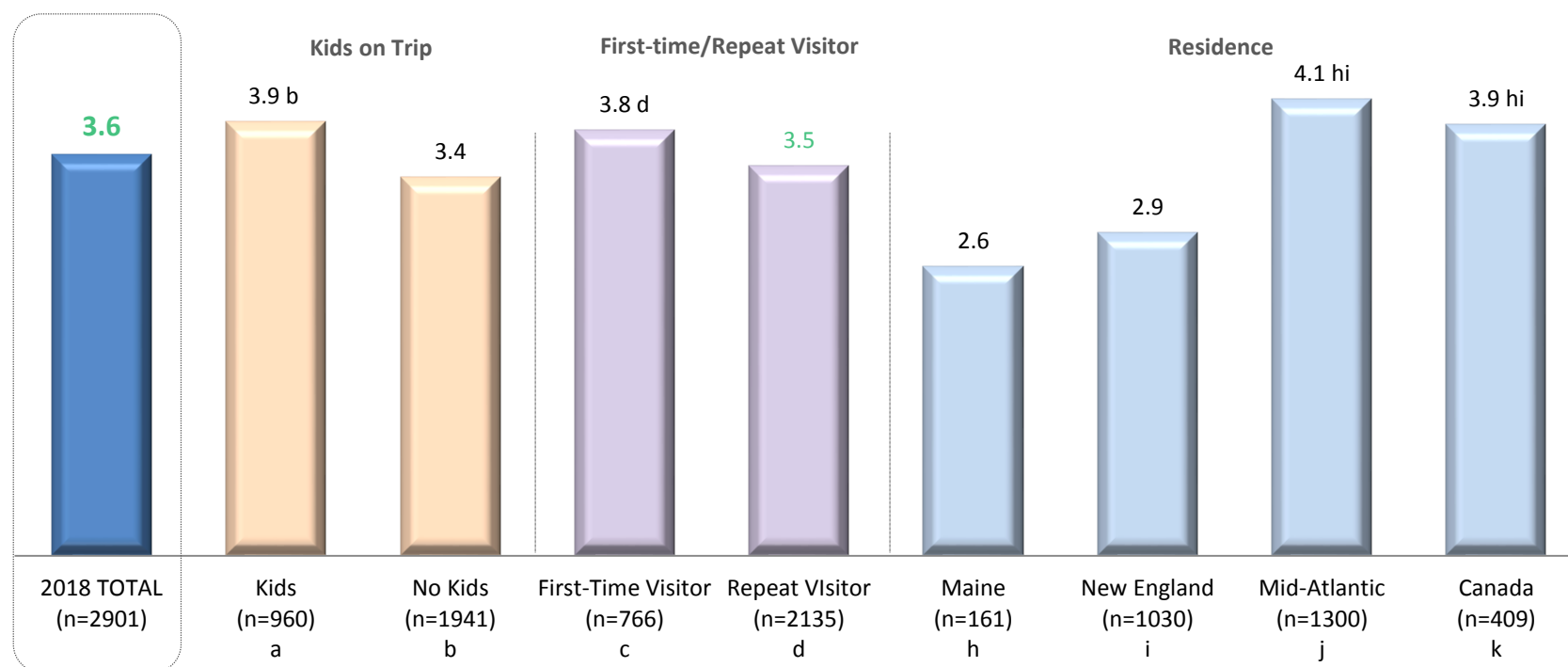
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

On average, overnight visitors stayed in Maine for three to four nights in 2018.

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

AVERAGE # OF NIGHTS AWAY FROM HOME



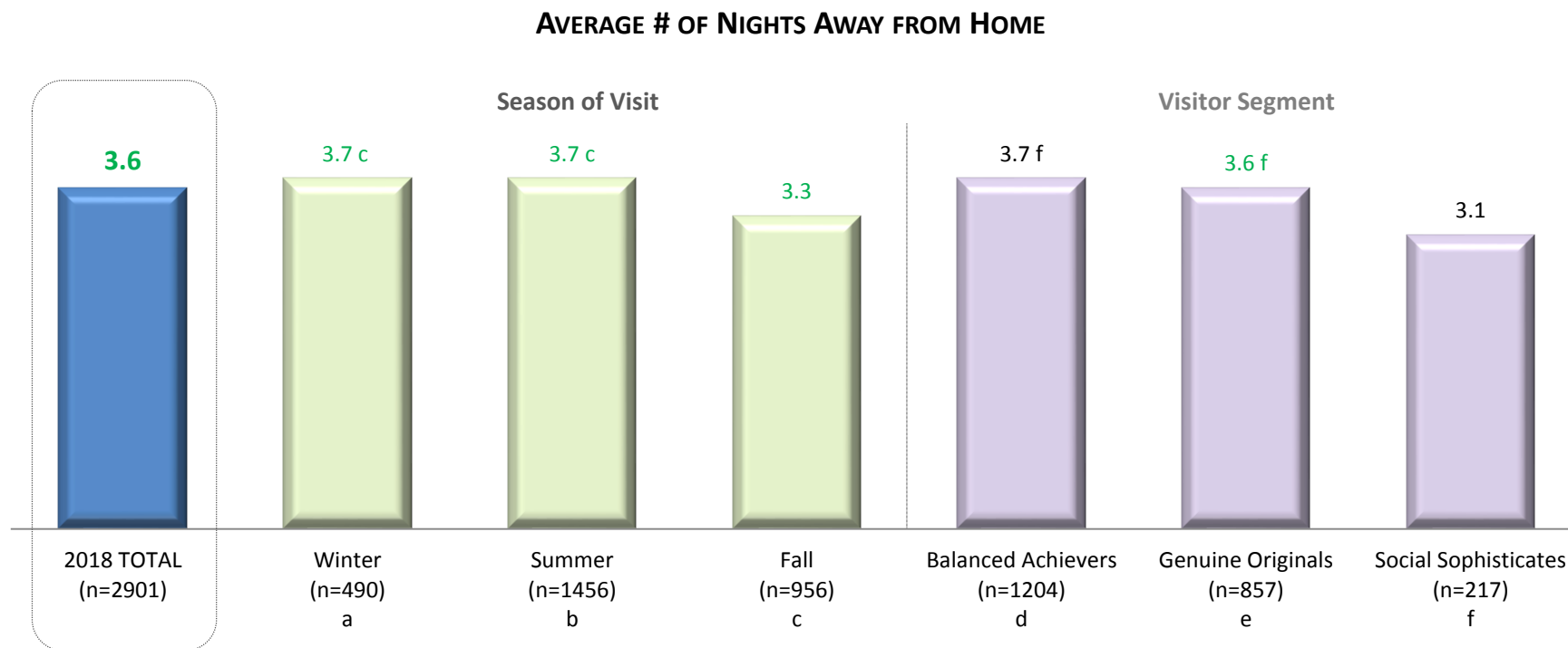
Q10. On this trip to Maine, how many nights were you away from home?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Length of stay was shortest for visitors during the Fall season.

- Overnight visitors categorized as Social Sophisticates also spent fewer nights in Maine as compared to those categorized as Balanced Achievers or Genuine Originals.



Q10. On this trip to Maine, how many nights were you away from home?

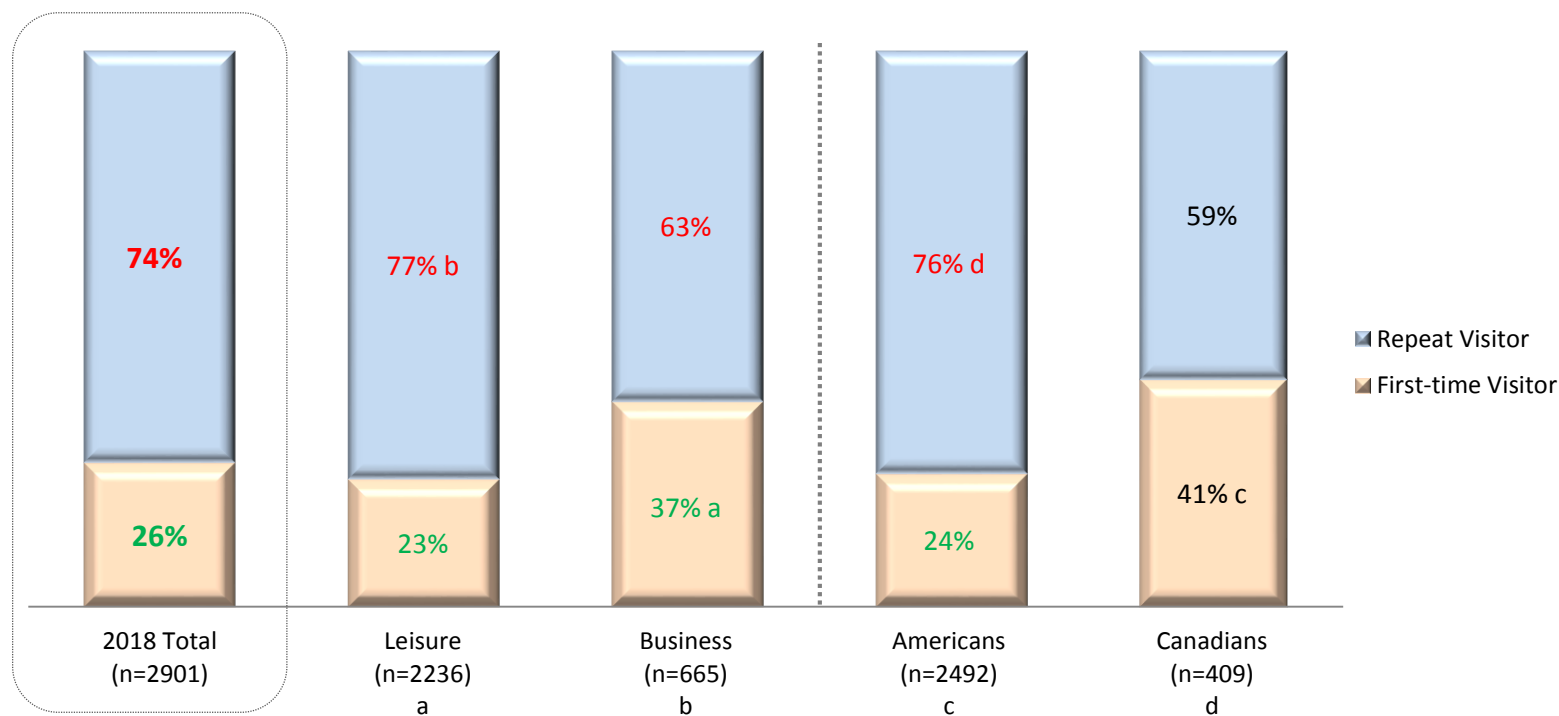
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

One-fourth of Maine's overnight visitors in 2018 were visiting the State for the first time, a higher proportion than in 2017.

- Business travelers were more likely than leisure travelers to be visiting Maine for the first time.
- Canadians remain more likely than American travelers to be visiting Maine for the first time.

REPEAT VERSUS FIRST-TIME VISITORS



Q11. Was this your first visit in Maine?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

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

Travelers more likely to be first-time visitors to Maine included those who were:

- Under the age of 35;
- Staying in paid accommodations;
- Arriving from the Mid-Atlantic region; and
- Categorized as Balanced Achievers.

FIRST-TIME VISITORS	
< 35 yrs (n=1,332)	35+ yrs (n=1,568)
<33%>	21%
Paid Accommodations (n=2,115)	Unpaid Accommodations (n=786)
<29%>	20%
Mid-Atlantic (n=1,300)	Maine, New England (n=1,191)
<38%>	9%

FIRST-TIME VISITORS		
Balanced Achievers (n=1,204)	Genuine Originals (n=857)	Social Sophisticates (n=217)
a	b	c
32% bc	17%	20%



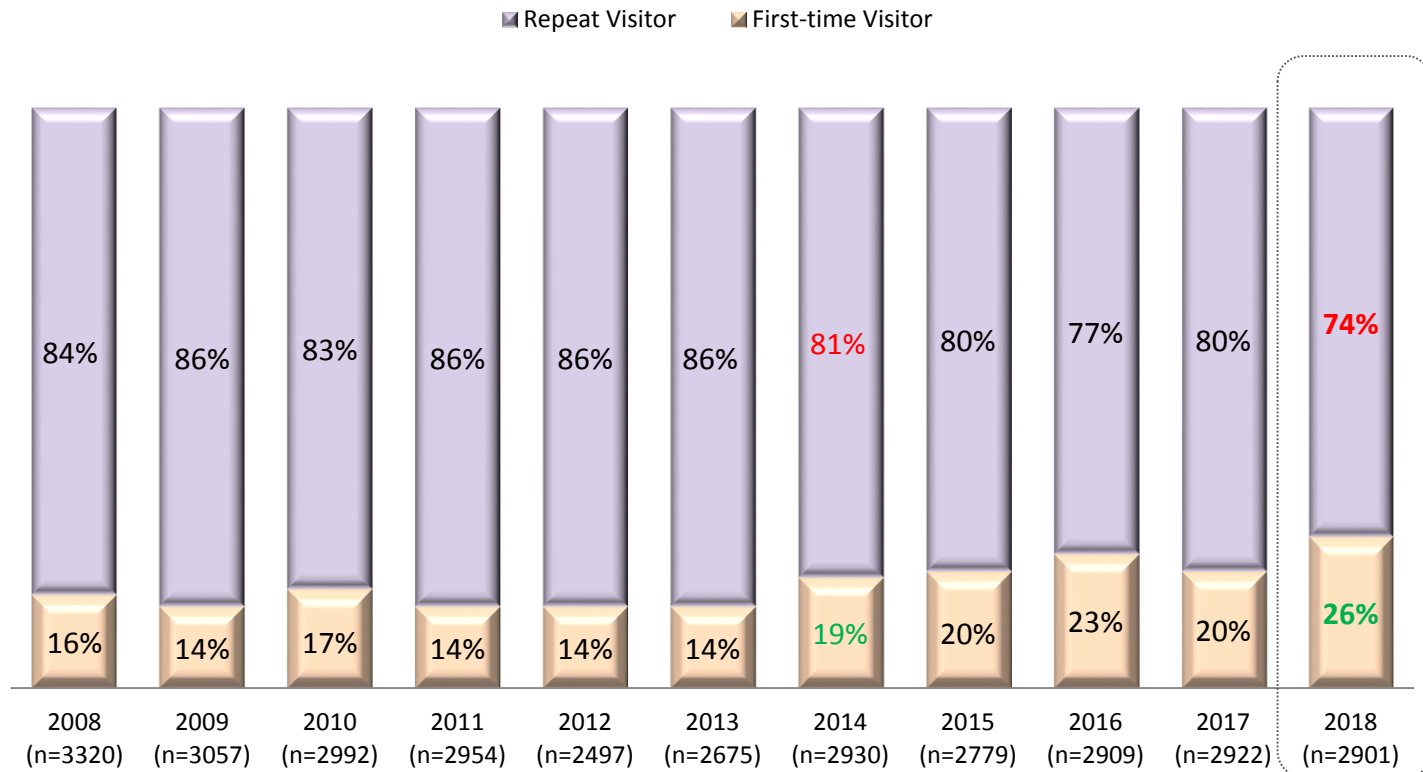
Q11. Was this your first visit in Maine?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

After exhibiting relative stability over the past several years, first-time visitation experienced an uptick in 2018, reaching its highest level in at least ten years.

REPEAT VERSUS FIRST-TIME VISITORS TREND



Q11. Was this your first visit in Maine?

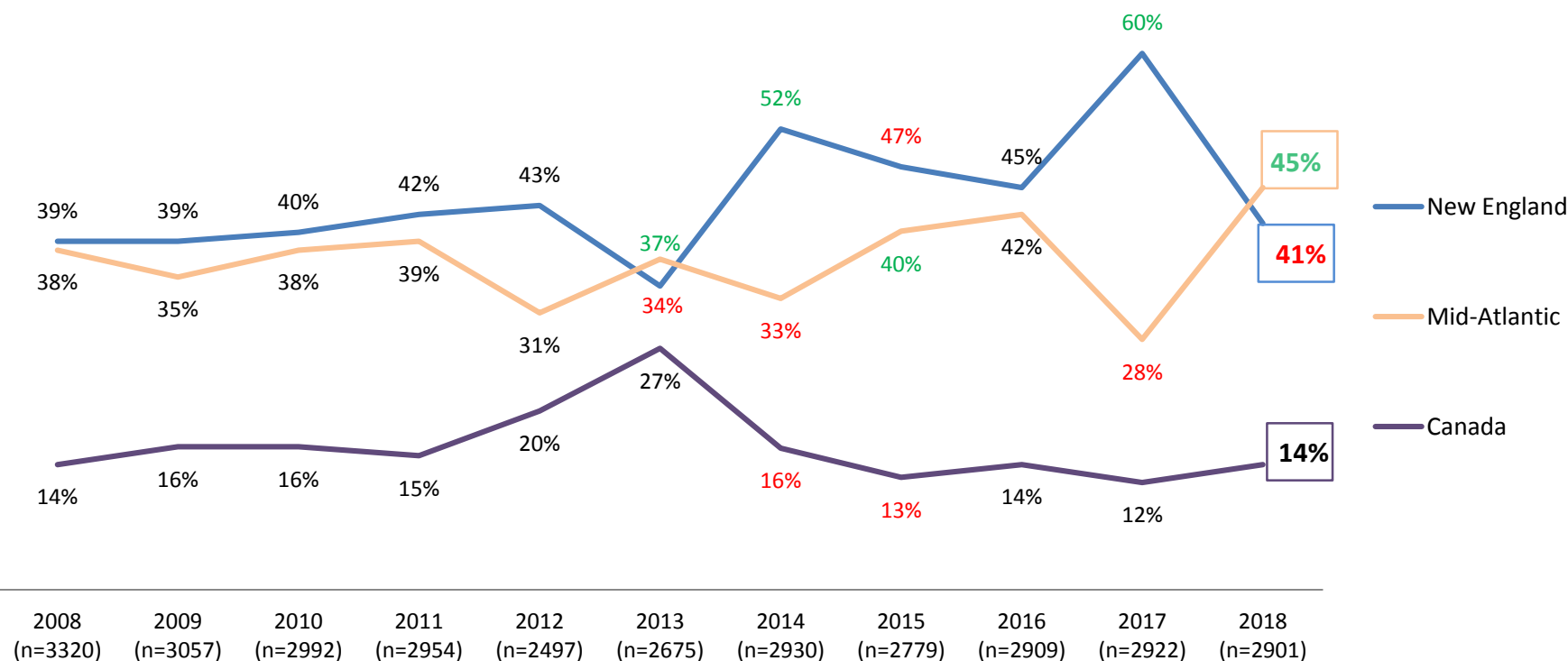
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Overnight Visitor Origin

Following relative stability from 2008 to 2011, geographic sources of Maine's overnight visitors have fluctuated from 2012 through 2018.

OVERNIGHT VISITOR ORIGIN



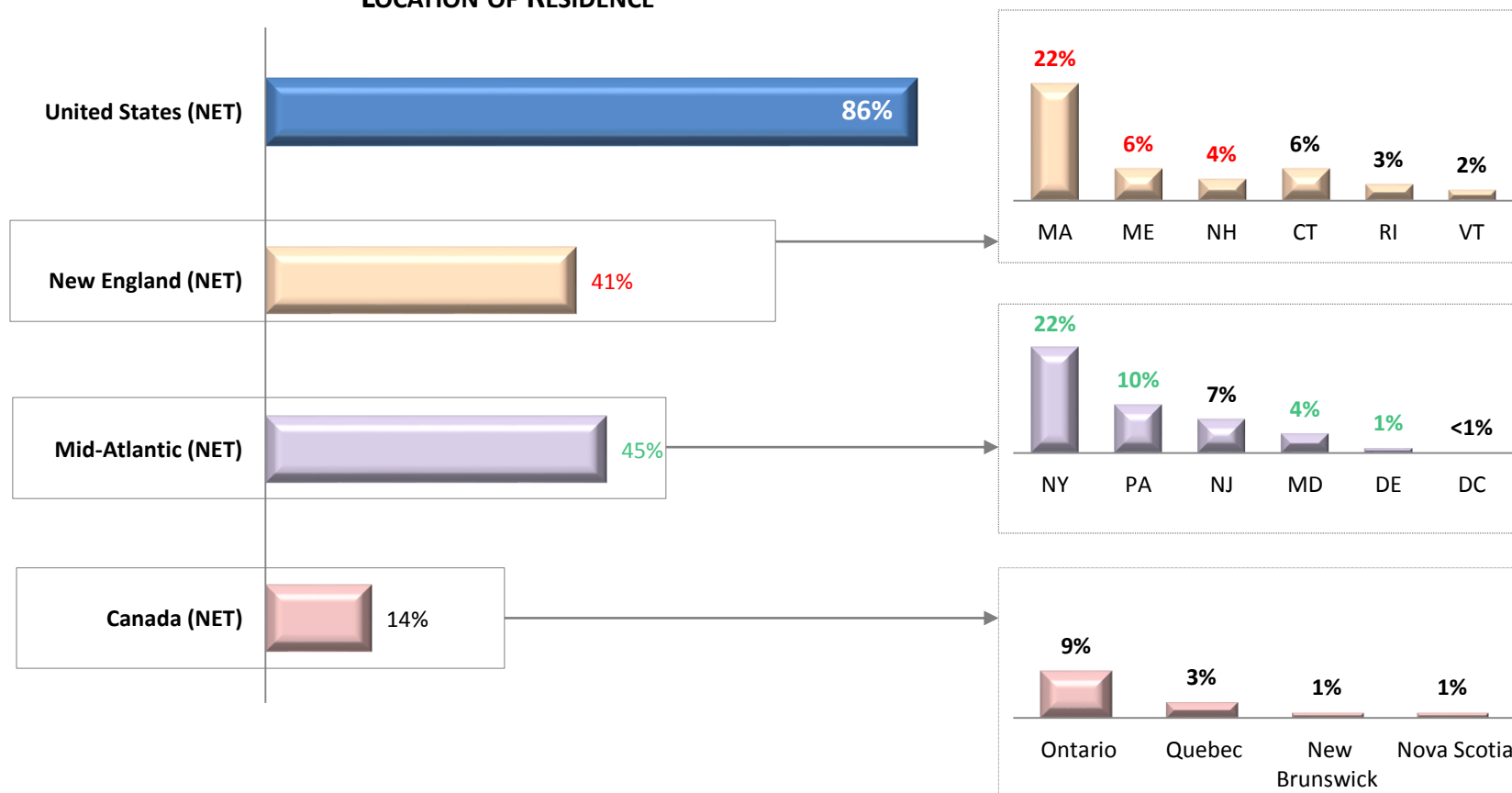
State/Province of Residence

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

The proportions of Americans and Canadians visiting Maine remained stable in 2018.

- Massachusetts and New York contributed the greatest proportions of overnight visitors to Maine.

LOCATION OF RESIDENCE*



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

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

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

- Travelers visiting during the fall were more likely than travelers in other seasons to be from New England, while summer visitors were more likely to be from the Mid-Atlantic region.
- Visitors categorized as Balanced Achievers were most likely to be from the Mid-Atlantic states, while Genuine Originals and Social Sophisticates were more likely to be from New England.
- Visitors staying in paid accommodations were more likely to come from the Mid-Atlantic region and Canada than were visitors staying in unpaid accommodations.

	2018 TOTAL (n=2901)	Season of Visit			Visitor Segment			Accommodations	
		Winter (n=490) a	Summer (n=1456) b	Fall (n=956) c	Balanced Achievers (n=1204) d	Genuine Originals (n=857) e	Social Sophisticates (n=217) f	Paid (n=2115) g	Unpaid (n=786) h
<u>United States</u>	86%	90% c	87%	83%	84%	91% d	86%	84%	90% g
New England	41%	43% b	36%	49% ab	34%	50% d	52% d	38%	50% g
Mid-Atlantic	45%	47% c	51% ac	34%	50% ef	41%	34%	47% h	40%
Canada	14%	10%	13%	17% a	16% e	9%	14%	16% h	10%

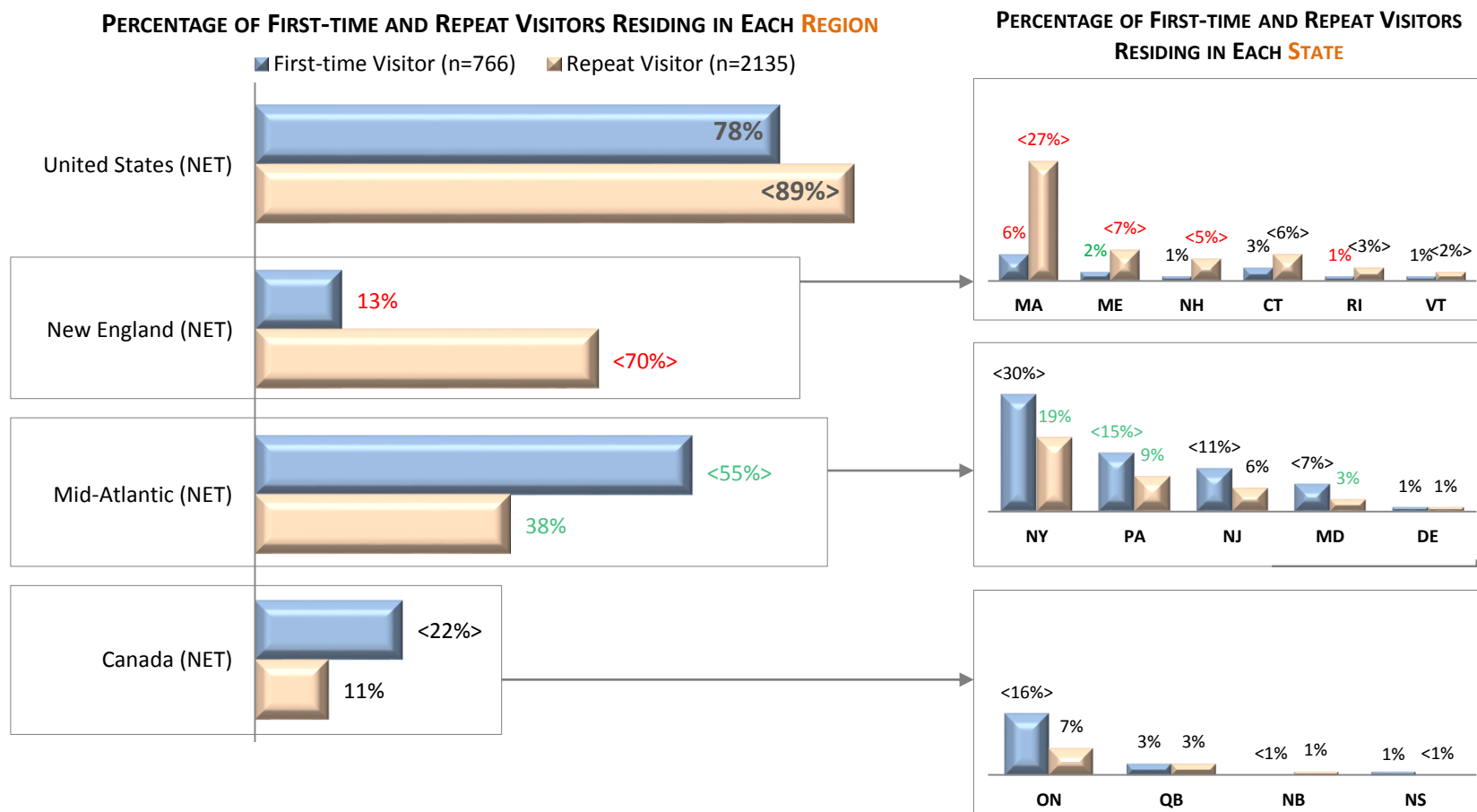
State/Province of Residence

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Consistent with past years, the Mid-Atlantic region and Canada were more likely to send first-time visitors to Maine in 2018.

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



State/Province of Residence

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

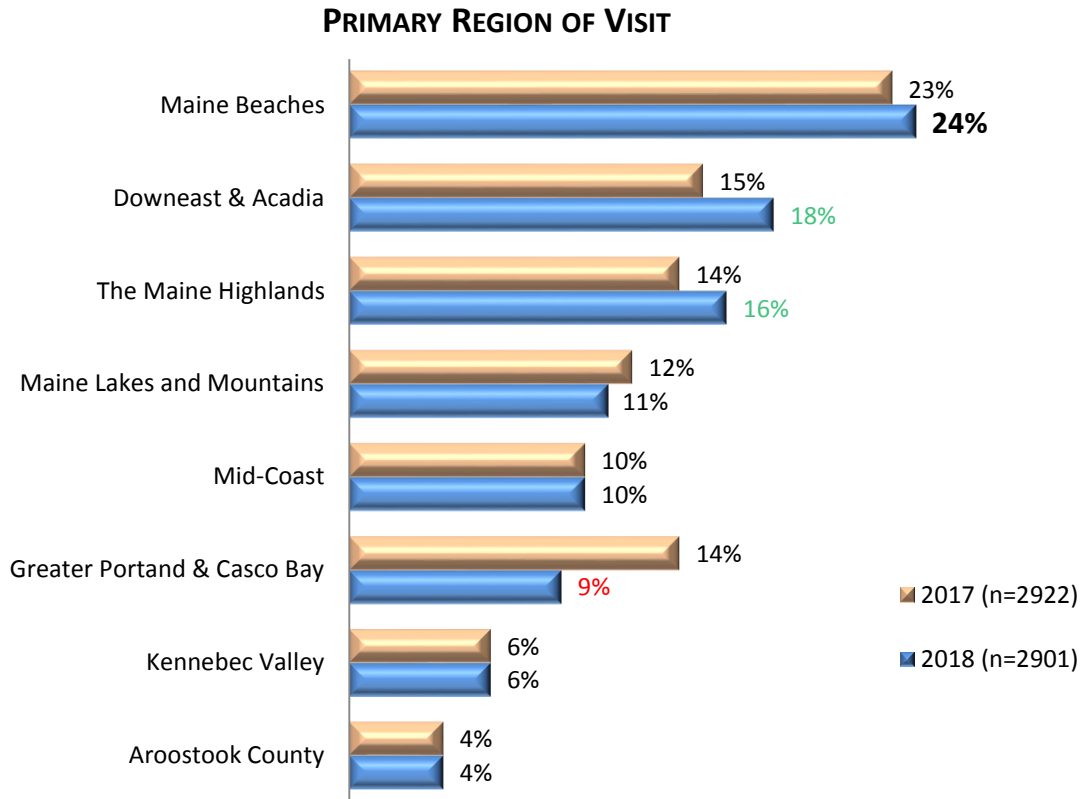
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Overnight Visitor Experience in Maine

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

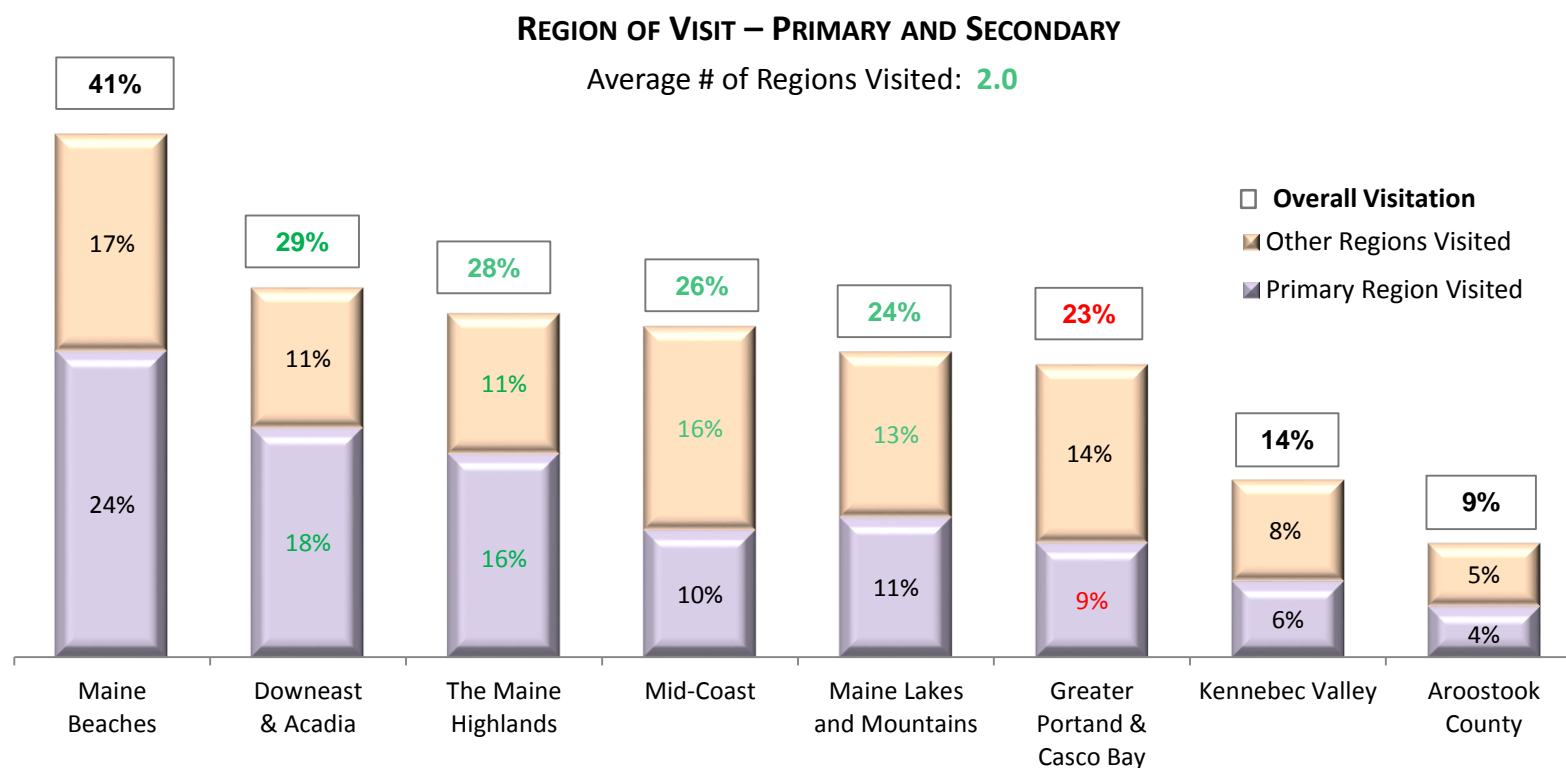
In 2018, there was a decrease in the proportion of travelers listing the Greater Portland region as their primary destination.



Overall visitation was also highest for the Maine Beaches region, followed by the Downeast/Acadia and Highlands regions.

The following types of travelers visited more regions, on average, than did their counterparts:

- First-time visitors, Visitors traveling with children, Balanced Achievers, Business travelers, Maine residents, and Travelers residing outside New England.



Q28. What region in Maine was your primary destination?

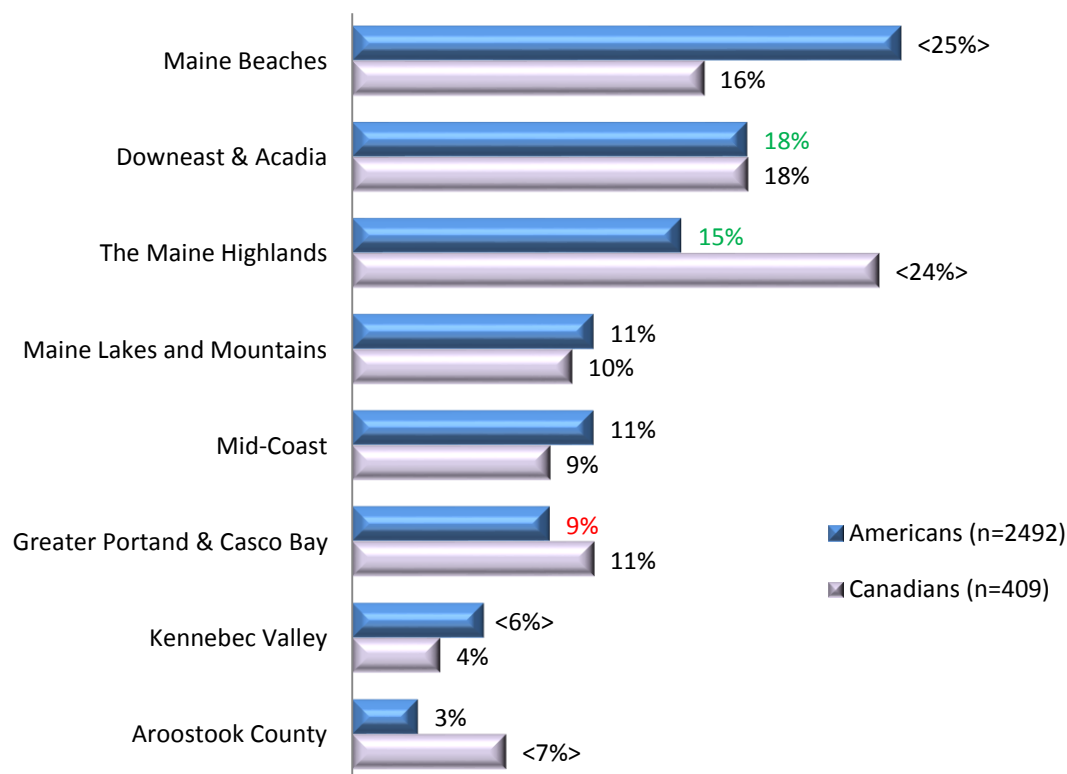
Q30. What other regions, if any, did you visit while you were in Maine?

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

Canadian and American travelers differed in some of the primary regions they visited in Maine.

- Canadians were more likely than American travelers to have visited the Maine Highlands and Aroostook County.
- American travelers were more likely than Canadians to have visited the Maine Beaches and Kennebec Valley regions.

PRIMARY REGION BY COUNTRY OF ORIGIN



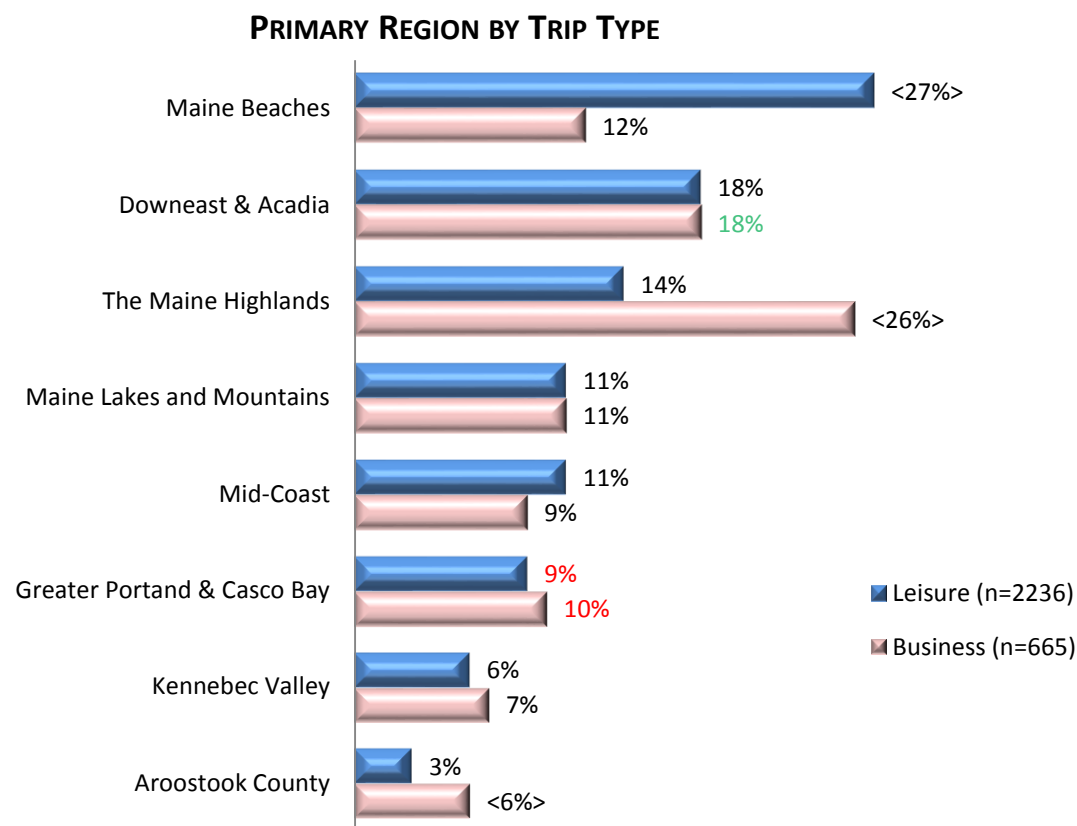
Q28. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

The most popular region for business travelers was the Maine Highlands region, while the most popular region for leisure travelers was the Maine Beaches region.

- Leisure travelers overall were more likely to have visited the Maine Beaches region than were business travelers.
- Business travelers, on the other hand, were more likely than leisure travelers to have visited the Maine Highlands region and Aroostook County.



Q28. What region in Maine was your primary destination?

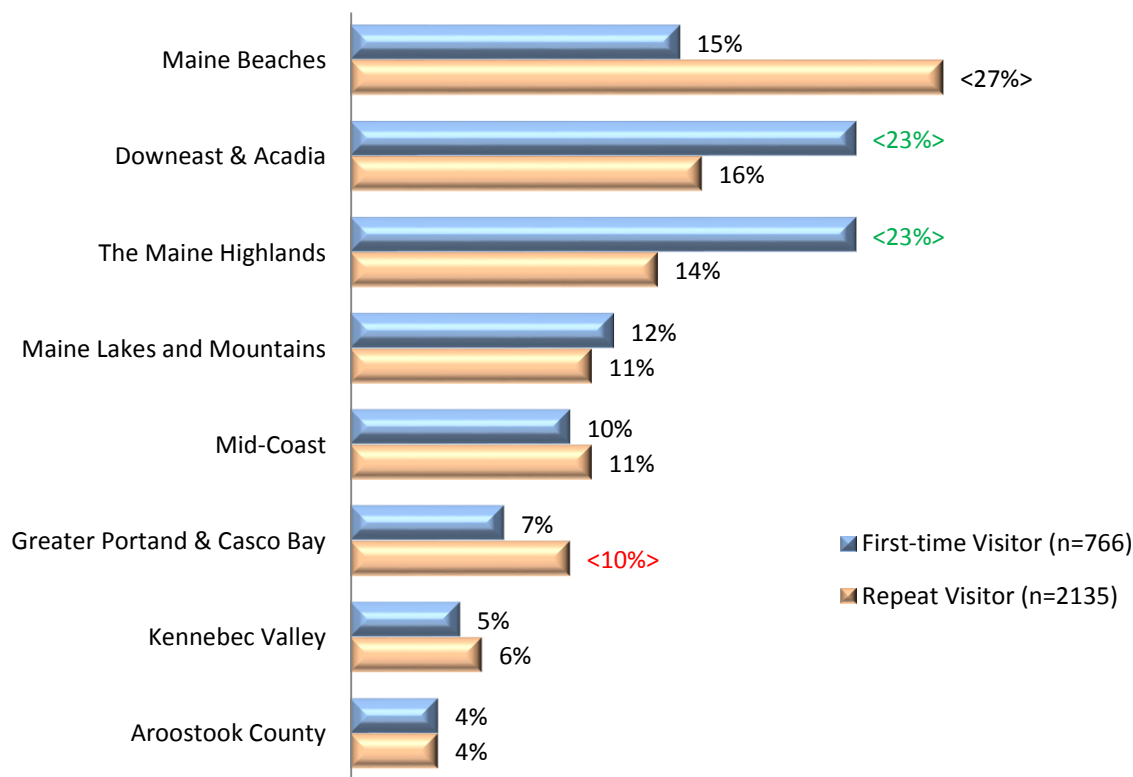
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

- First-time overnight visitors were more likely than repeat visitors to visit the Maine Highlands region and Downeast & Acadia as their primary destinations.
- Repeat visitors, on the other hand, were more likely to list the Maine Beaches and Greater Portland/Casco Bay regions as their primary destinations.

PRIMARY REGION BY FIRST-TIME VS. REPEAT VISITORS



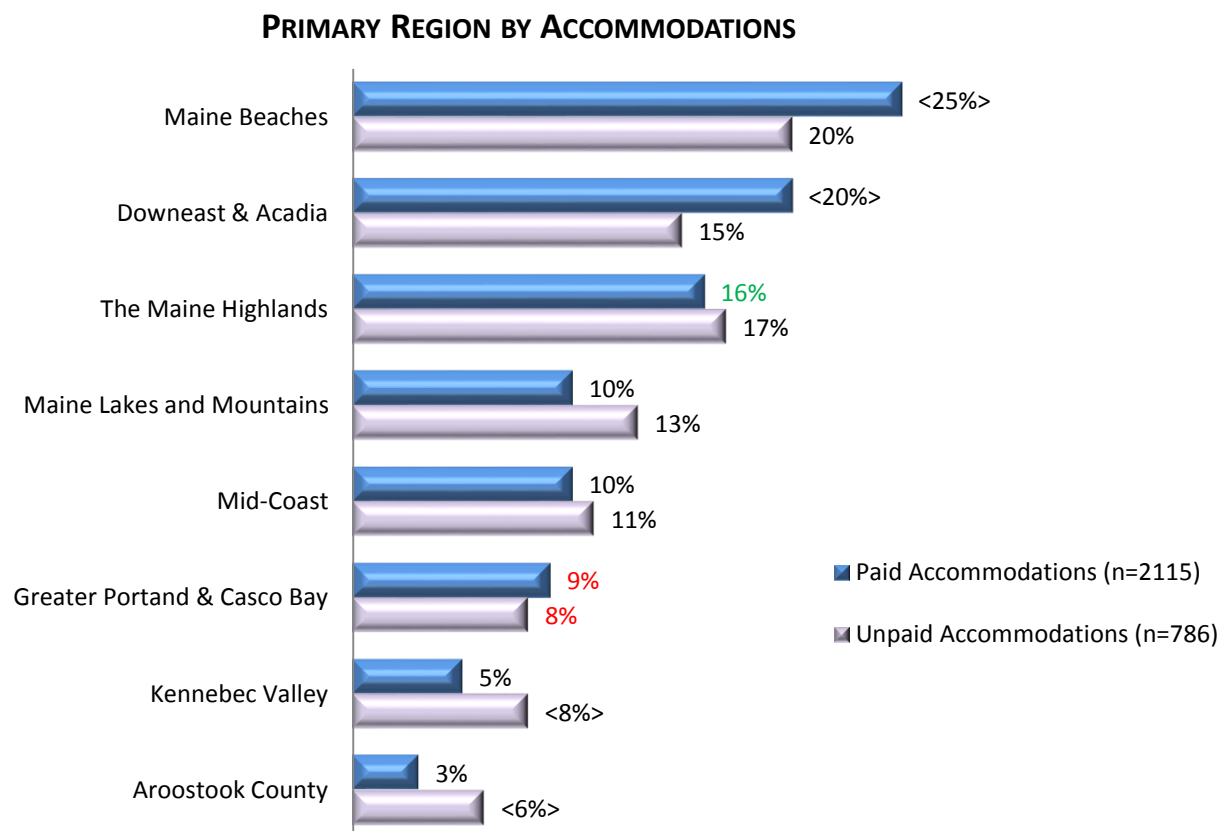
Q28. What region in Maine was your primary destination?

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Regional destinations also differed by the type of accommodations travelers stayed in while visiting.

- Overnight visitors staying in paid accommodations were more likely than those staying in unpaid accommodations to state that the Maine Beaches and Downeast & Acadia regions were their primary destinations.
- Those staying in unpaid accommodations were more likely to list Aroostook County and Kennebec Valley as their primary destinations.



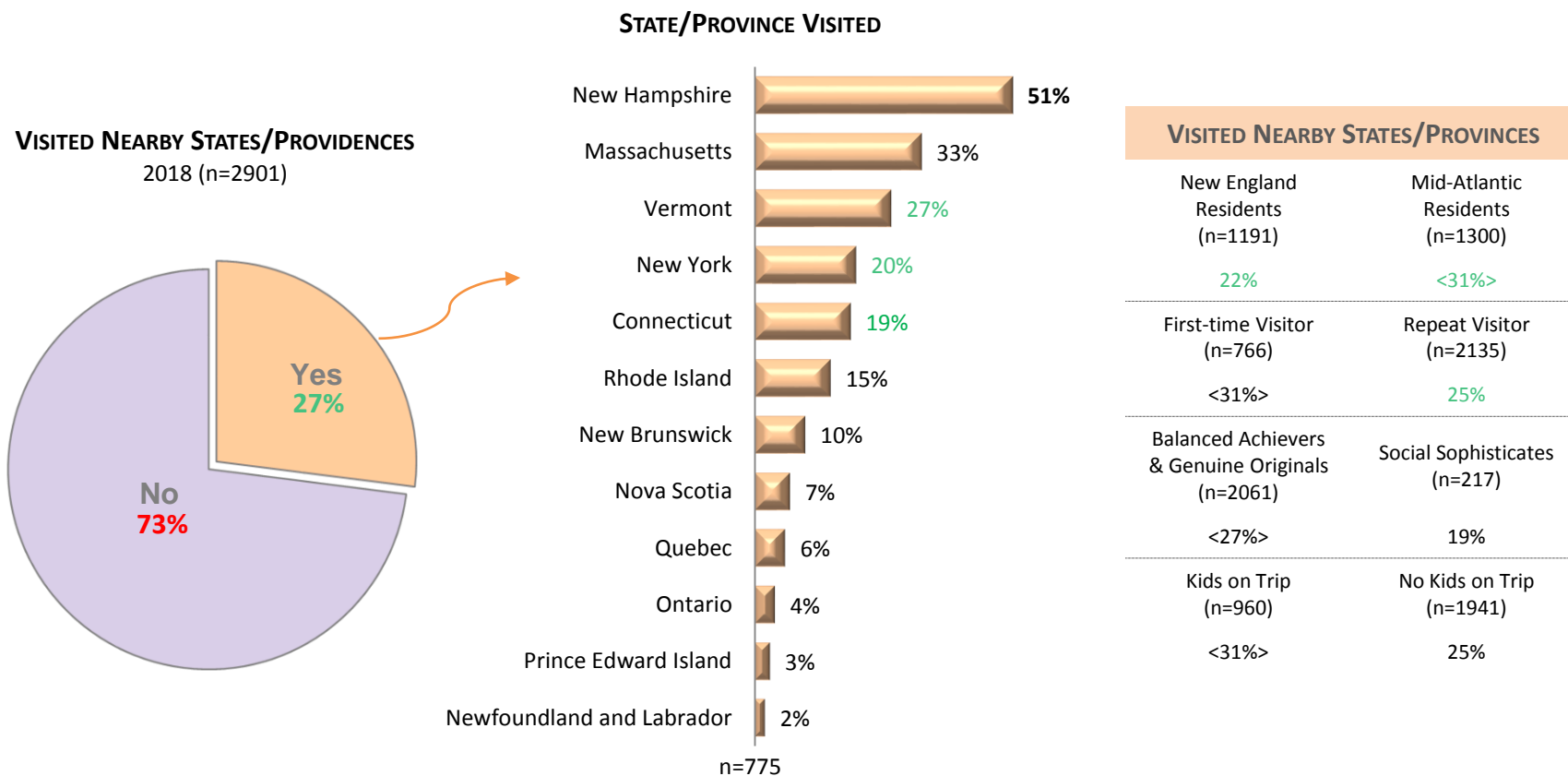
Q28. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Three-fourths of Maine's overnight visitors stayed in Maine for their entire trip, a lower proportion than last year.

- Among the 27% who also visited nearby states/provinces while traveling to Maine, the highest proportion (51%) spent some time in New Hampshire.
- Travelers from the Mid-Atlantic region, first-time visitors, travelers categorized as Balanced Achievers or Genuine Originals, and those traveling with children were all more likely to have visited other states or provinces while on their trip to Maine.



Q19. On this trip to Maine, did you also visit any other nearby states or provinces?

Q20. What other states or provinces did you visit on this same trip?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

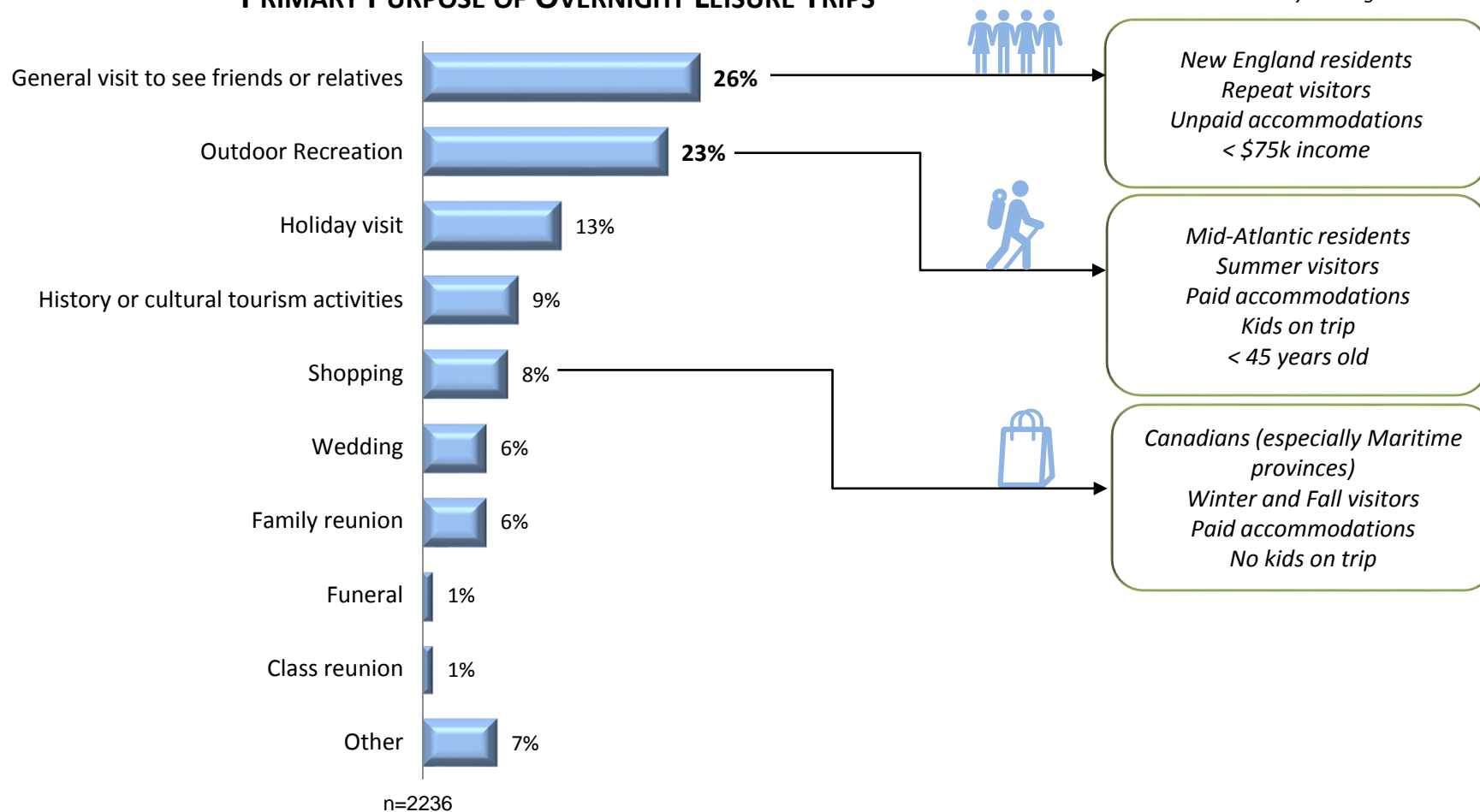
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Overnight Visitor Interest Areas and Activities

Overnight leisure travelers were most likely visiting friends or relatives or participating in outdoor recreation.

PRIMARY PURPOSE OF OVERNIGHT LEISURE TRIPS



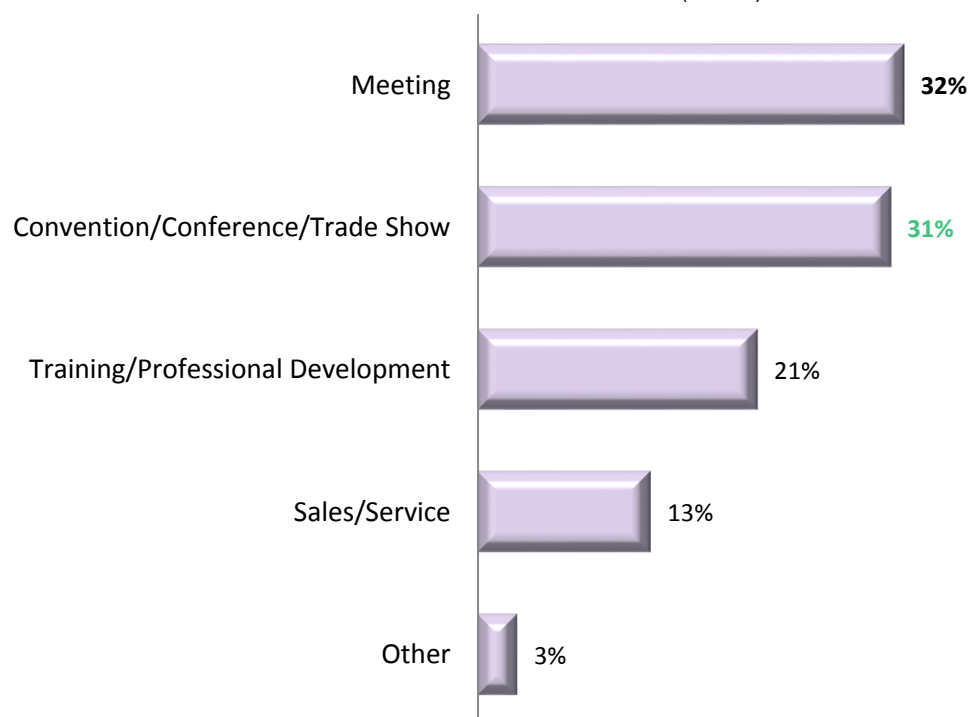
Q9. What was the primary purpose of your most recent leisure trip in Maine?

Business travelers were most likely in Maine for a general meeting or a convention/conference/trade show.

- American business travelers were more likely than Canadian business travelers to be in Maine for sales or service, while Canadians were more likely to be in Maine for a general meeting.

PRIMARY PURPOSE OF OVERNIGHT BUSINESS TRIPS

(n=665)



PRIMARY PURPOSE BY VISITOR ORIGIN

Primary Purpose:	Americans (n=544)	Canadians (n=120)
Sales or service	<14%>	8%
Meeting	30%	<42%>

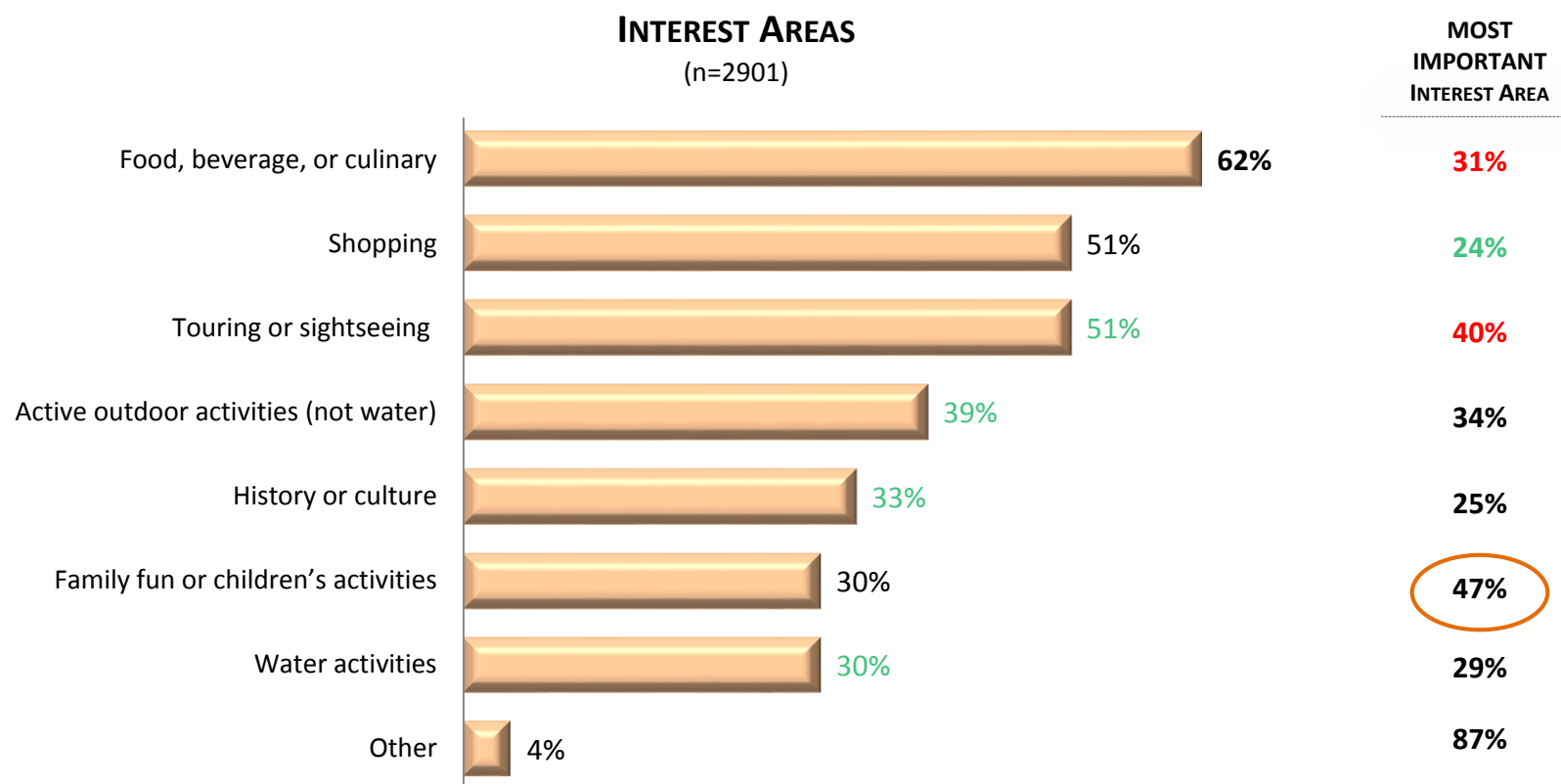
Q8. What was the primary purpose of your most recent business trip in Maine?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Food/beverage/culinary activities remains the most popular interest area among overnight visitors in 2018.

- Shopping and touring/sightseeing follow closely behind.
- Among those interested in family fun or children's activities, half rank it as the MOST IMPORTANT in their decision to visit Maine.



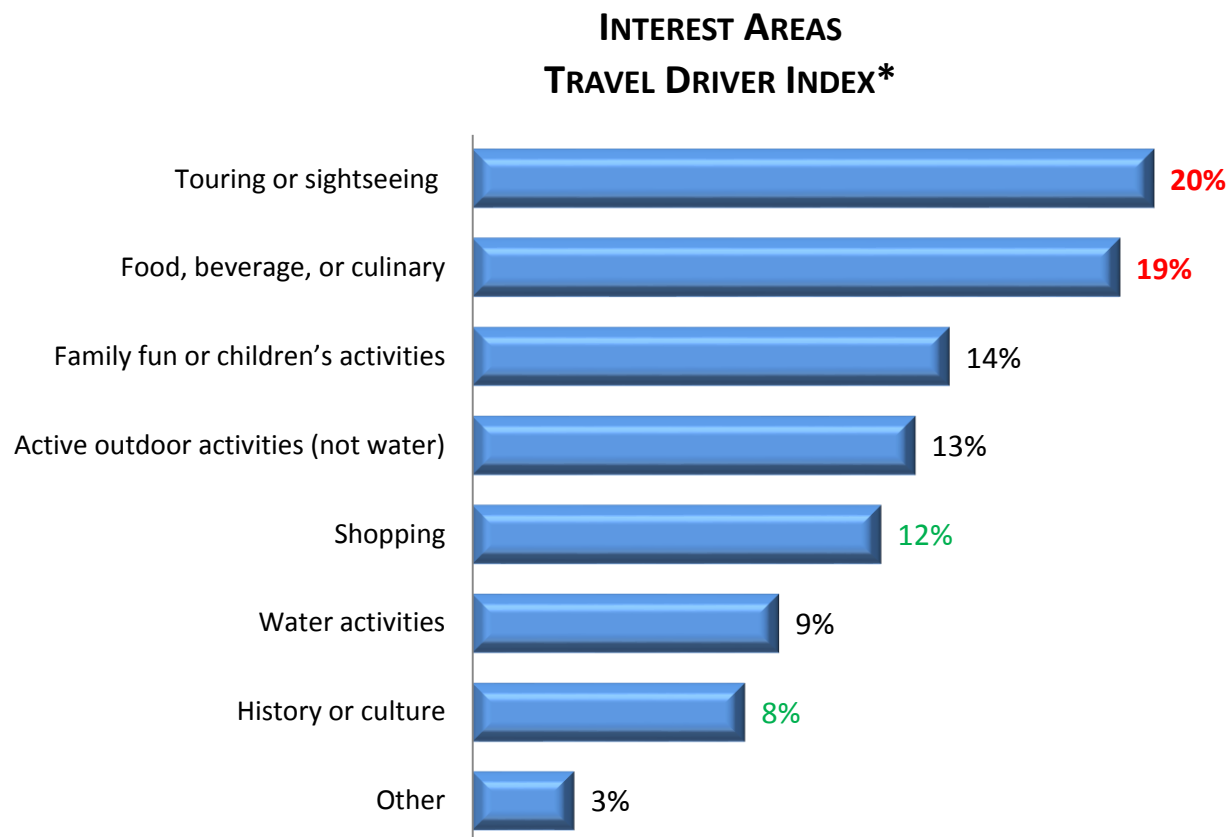
Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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. <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Travel Driver Index: When analyzing BOTH interest and importance in deciding to visit, touring/sightseeing and food/beverage/culinary activities rank highest.

- Food/beverage/culinary and touring/sightseeing activities score lower on the Travel Driver Index in 2018 than in 2017, while shopping and history/culture activities score higher in 2018.



***Travel Driver Index = percentage selecting category as interest area X percentage listing 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.

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

Interest areas differed by age, previous visitation, and presence of children in the travel party.

- As may be expected, active outdoor activities, water activities and family fun/children's activities were all more popular with travel parties that include children. These interest areas were also more prevalent among travelers under the age of 45.
- First-time visitors were more likely to be interested in touring/sightseeing and history/culture than were repeat visitors, while shopping and family fun/children's activities were more popular among repeat visitors.

INTEREST AREA:	2018 TOTAL (n=2901)	Kids on Trip		First-time Visitor/ Repeat Visitor		Age	
		Kids (n=960) a	No Kids (n=1941) b	First-time (n=766) C	Repeat (n=2135) d	< 45 yrs (n=1991) e	45+ yrs (n=909) f
Food, beverage, or culinary	62%	59%	63%	58%	63%	62%	62%
Shopping	51%	54%	50%	48%	53% c	51%	54%
Touring or sightseeing	51%	54%	50%	58% d	49%	53%	49%
Active outdoor activities (not water)	39%	43% b	37%	38%	40%	43% f	33%
History or culture	33%	33%	33%	40% d	31%	34%	33%
Family fun or children's activities	30%	64% b	13%	25%	32% c	36% f	21%
Water activities	30%	39% b	26%	28%	31%	33% f	24%
Other	4%	3%	5% a	2%	5% c	3%	8% e

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

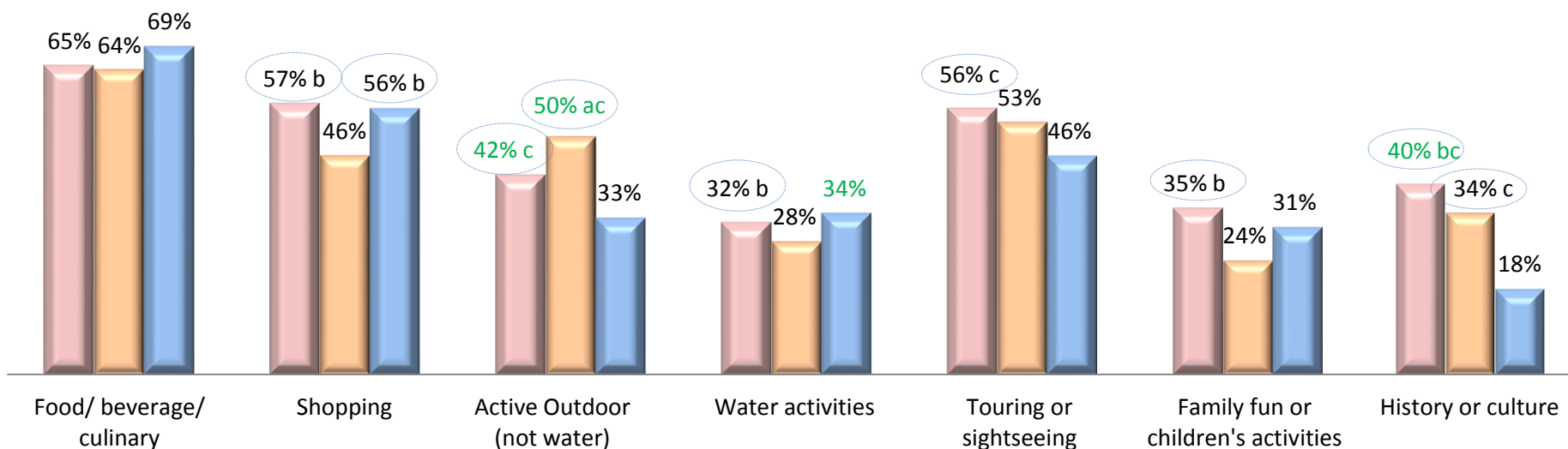
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Travelers' interests also varied by visitor segment classification.

- Travelers categorized as Genuine Originals were the least likely to be interested in shopping and the most likely to be interested in active outdoor (non-water) activities.
- Those categorized as Social Sophisticates were the least likely to be interested in history or culture activities and active outdoor (non-water) activities.
- Balanced Achievers were more likely to be interested in history or culture activities, as compared to Genuine Originals and Social Sophisticates.

INTEREST AREAS BY VISITOR SEGMENT

■ Balanced Achievers (n=1204) a ■ Genuine Originals (n=857) b ■ Social Sophisticates (n=217) c



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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

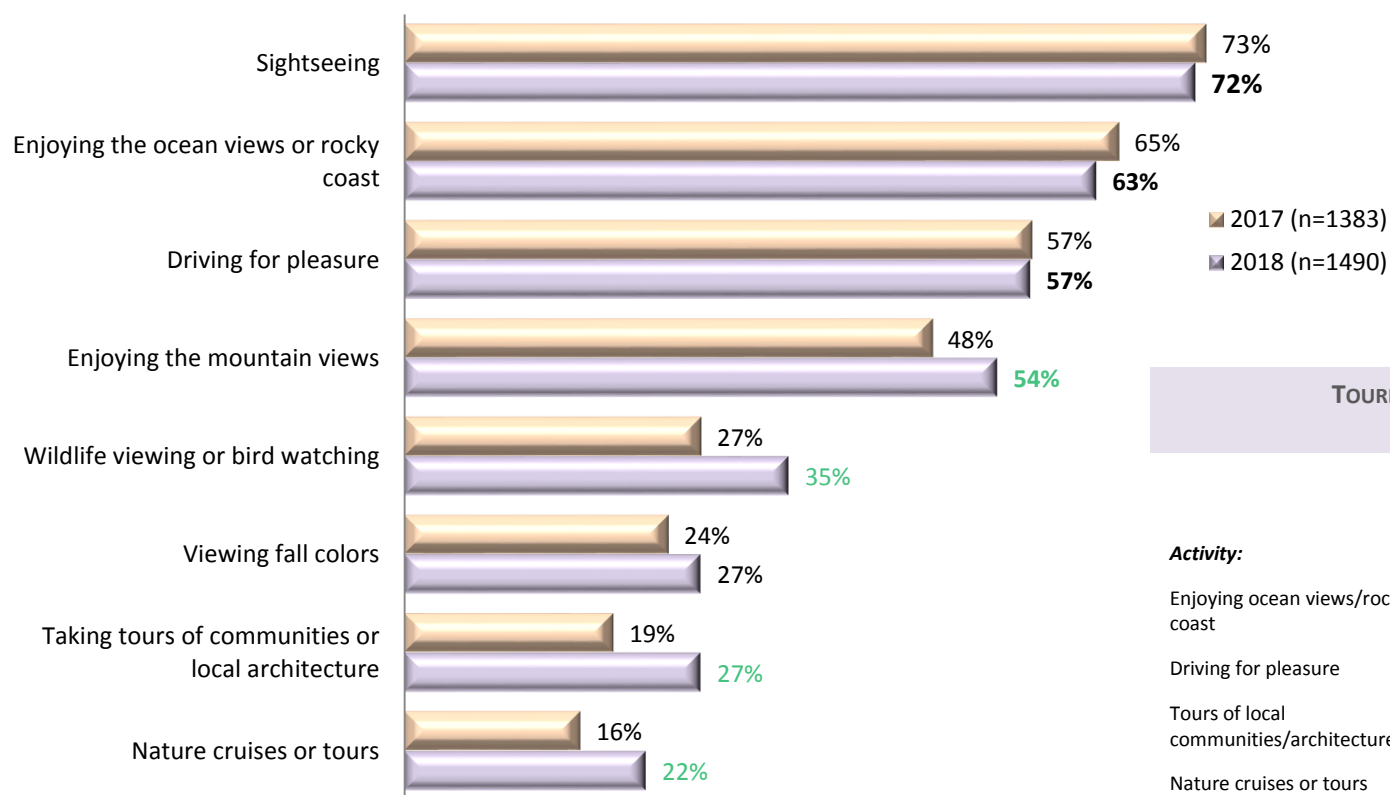
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Looking specifically at visitors who listed touring/sightseeing as a broad interest area, general sightseeing activities were the most popular.

- Enjoying the ocean views or rocky coast, driving for pleasure, and enjoying the mountain views were the next most popular touring/sightseeing activities.
- Visitors categorized as Balanced Achievers and Genuine Originals differ in the types of touring/sightseeing activities they participate in while visiting Maine.

TOURING OR SIGHTSEEING ACTIVITIES

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



TOURING/SIGHTSEEING ACTIVITIES BY VISITOR SEGMENT

	Balanced Achievers (n=674) a	Genuine Originals (n=453) b	Social Soph. (n=100) c
Activity:			
Enjoying ocean views/rocky coast	60%	74% a	69%
Driving for pleasure	57%	65% a	58%
Tours of local communities/architecture	35% bc	20%	23%
Nature cruises or tours	25% b	19%	19%

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

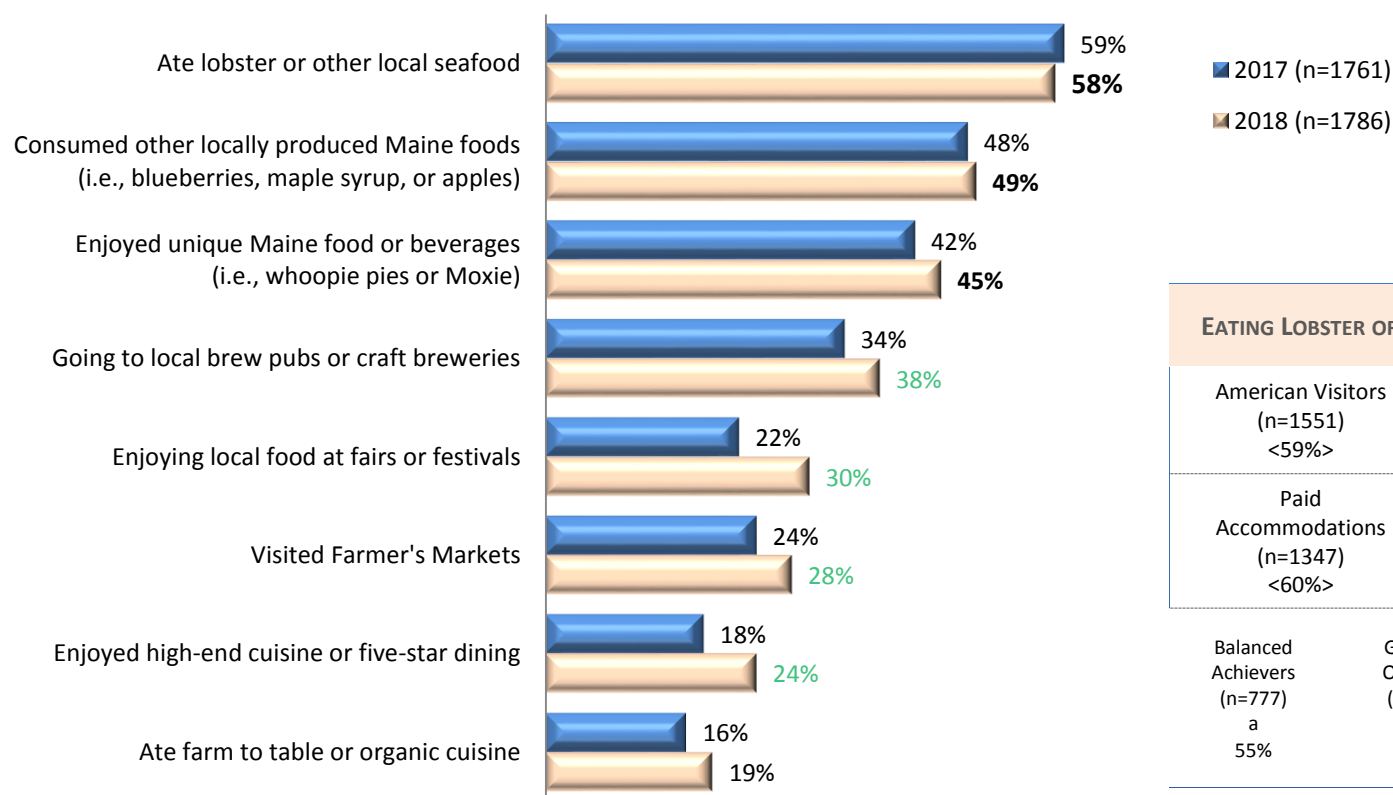
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Eating lobster or other local seafood was more popular among domestic visitors than among Canadian visitors, and also among visitors staying in paid accommodations. Travelers categorized as Genuine Originals or Social Sophisticates were also more likely to have eaten lobster or other local seafood, as compared to those categorized as Balanced Achievers.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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



EATING LOBSTER OR OTHER LOCAL SEAFOOD		
American Visitors (n=1551) <59%>	Canadian Visitors (n=234) 50%	
Paid Accommodations (n=1347) <60%>	Unpaid Accommodations (n=439) 52%	
Balanced Achievers (n=777) a	Genuine Originals (n=552) b	Social Soph. (n=150) c
55%	63% a	69% a

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

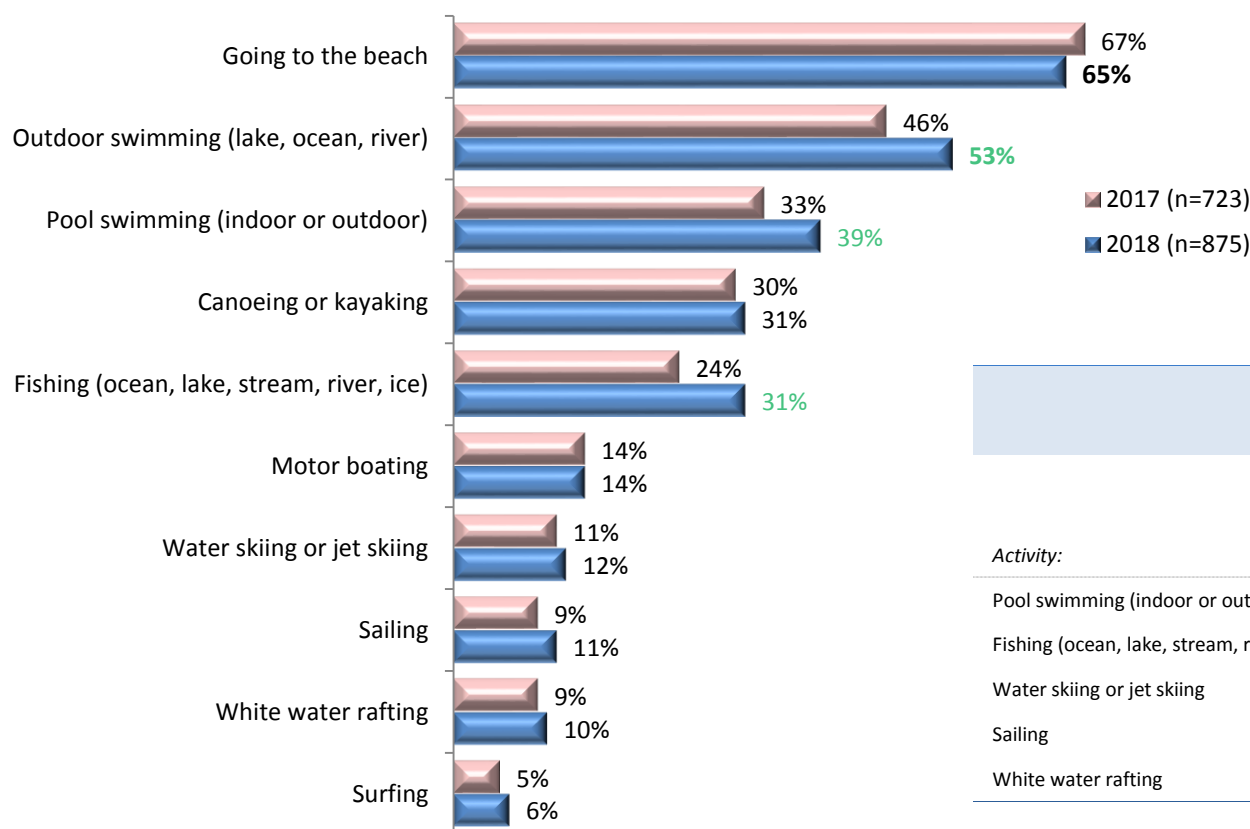
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Going to the beach was the most frequently cited water activity among visitors selecting this interest area.

- Higher proportions of visitors interested in water activities reported doing some outdoor swimming (53% vs 46%) and pool swimming (39% vs 33%) in 2018 as compared to 2017. Fishing was also more popular in 2018 (31% vs 24%).

WATER ACTIVITIES

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



WATER ACTIVITIES BY VISITOR SEGMENT

Activity:	Balanced Achievers (n=390) a	Genuine Originals (n=238) b	Social Soph. (n=73) c
Pool swimming (indoor or outdoor)	43% b	30%	35%
Fishing (ocean, lake, stream, river, ice)	36% b	26%	35%
Water skiing or jet skiing	16% b	4%	16% b
Sailing	14% c	8%	6%
White water rafting	14% bc	4%	6%

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

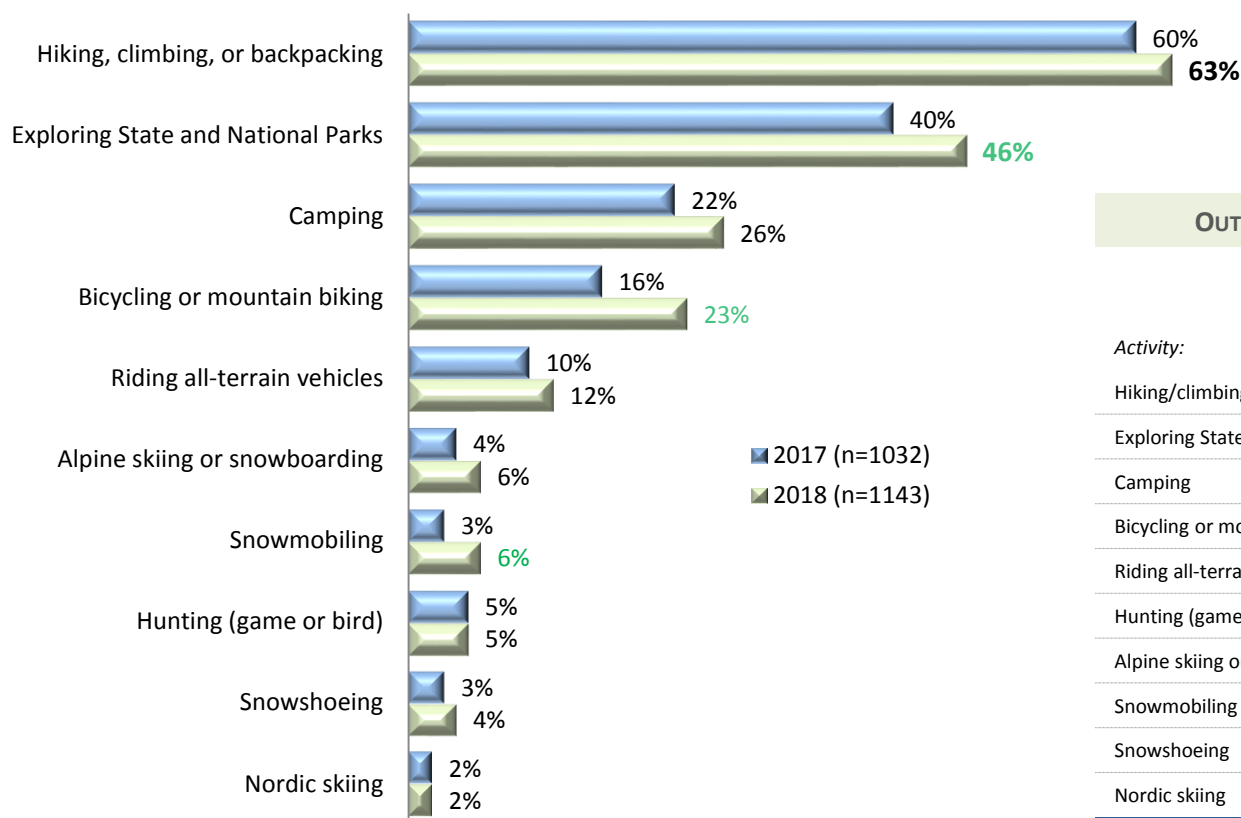
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Hiking/climbing/backpacking was the top activity among overnight visitors interested in outdoor recreation, followed by exploring State and National Parks.

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

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

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



OUTDOOR RECREATION BY VISITOR SEGMENT

Activity:	Balanced Achievers (n=503) a	Genuine Originals (n=429) b	Social Soph. (n=72) c
Hiking/climbing/backpacking	58%	72% a	60%
Exploring State & Nat'l Parks	41%	55% a	43%
Camping	27%	22%	21%
Bicycling or mountain biking	29% b	17%	23%
Riding all-terrain vehicles	15% b	8%	10%
Hunting (game or bird)	9% bc	2%	1%
Alpine skiing or snowboarding	10% b	3%	3%
Snowmobiling	9% bc	3%	2%
Snowshoeing	7% bc	1%	2%
Nordic skiing	4% b	1%	2%

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

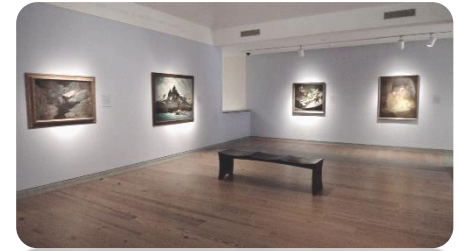
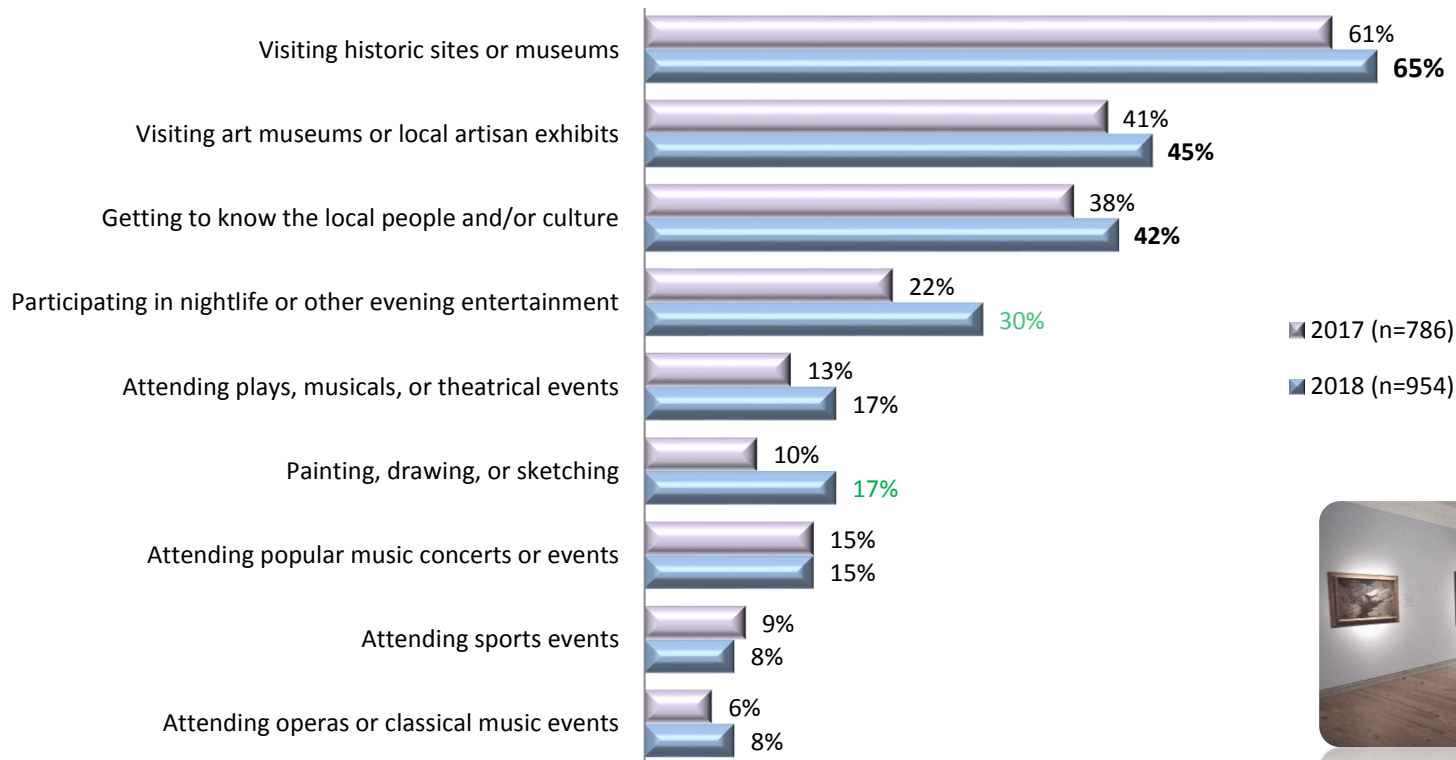
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Visiting historic sites/museums was the most prevalent activity among overnight visitors interested in history or culture.

- Visiting art museums or local artisan exhibits and getting to know the local people/culture were also popular among visitors interested in history or culture activities.

HISTORY OR CULTURE ACTIVITIES

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

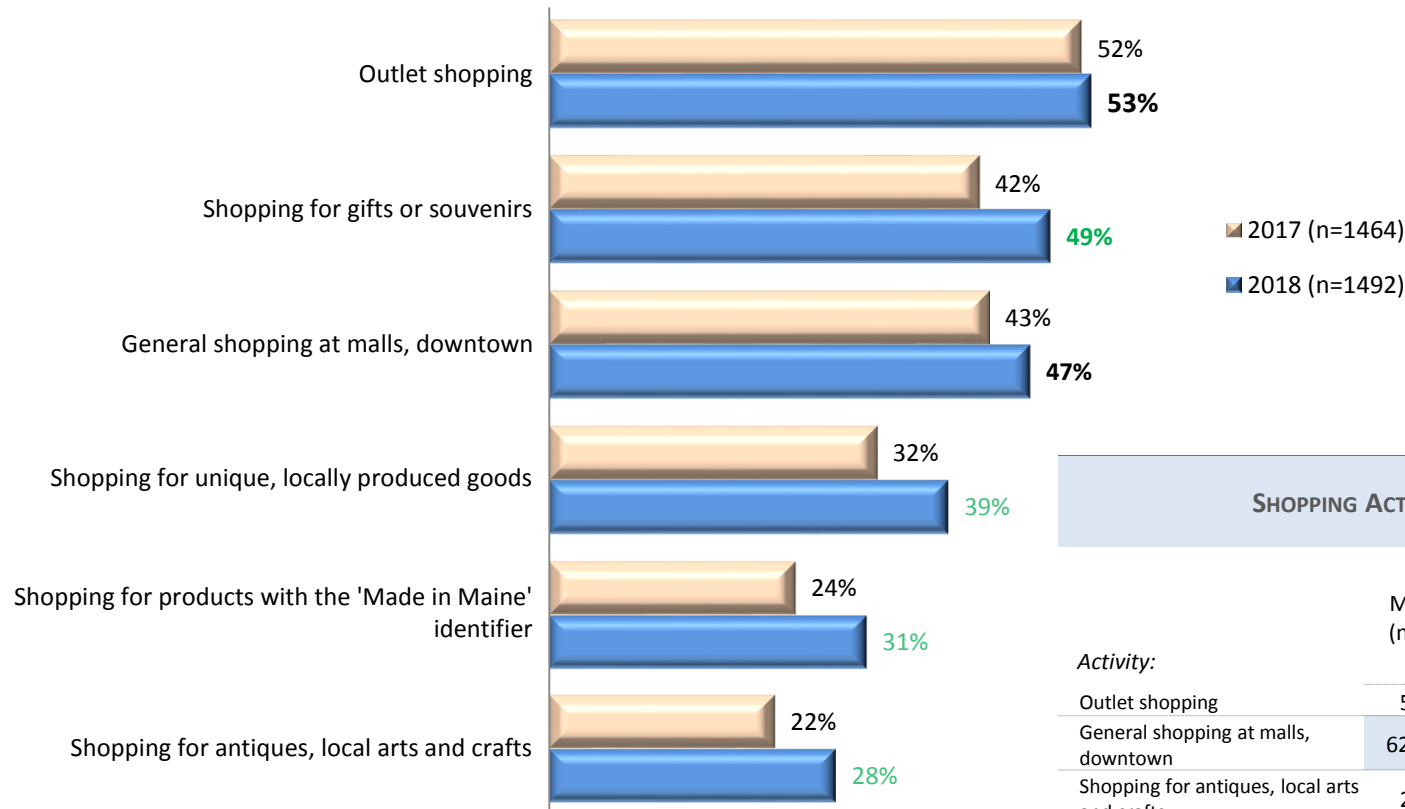


Half of overnight visitors who were interested in shopping engaged in outlet shopping, shopping for gifts/souvenirs, or general shopping at malls/downtown while in Maine.

- Outlet shopping was most popular among out-of-state visitors from New England.
- In-state visitors and Canadians were more likely than out-of-state American visitors to do some general shopping at malls or downtown.

SHOPPING ACTIVITIES

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



SHOPPING ACTIVITY BY VISITOR ORIGIN

	Maine (n=73) a	New England (n=586) b	Mid- Atlantic (n=619) c	Canada (n=215) d
Outlet shopping	50%	65% ac	44%	48%
General shopping at malls, downtown	62% bc	44%	45%	56% bc
Shopping for antiques, local arts and crafts	20%	30%	30% a	20%

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

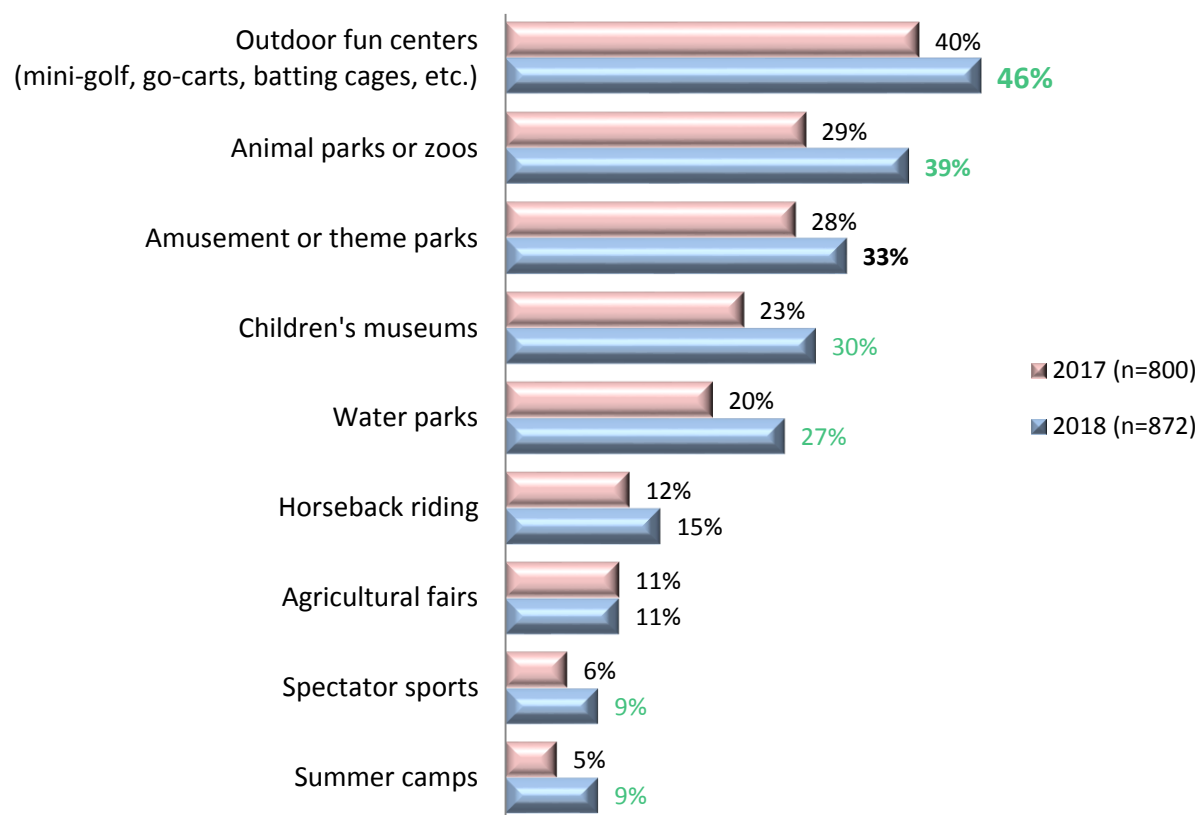
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Visiting outdoor fun centers was the most popular activity among 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



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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

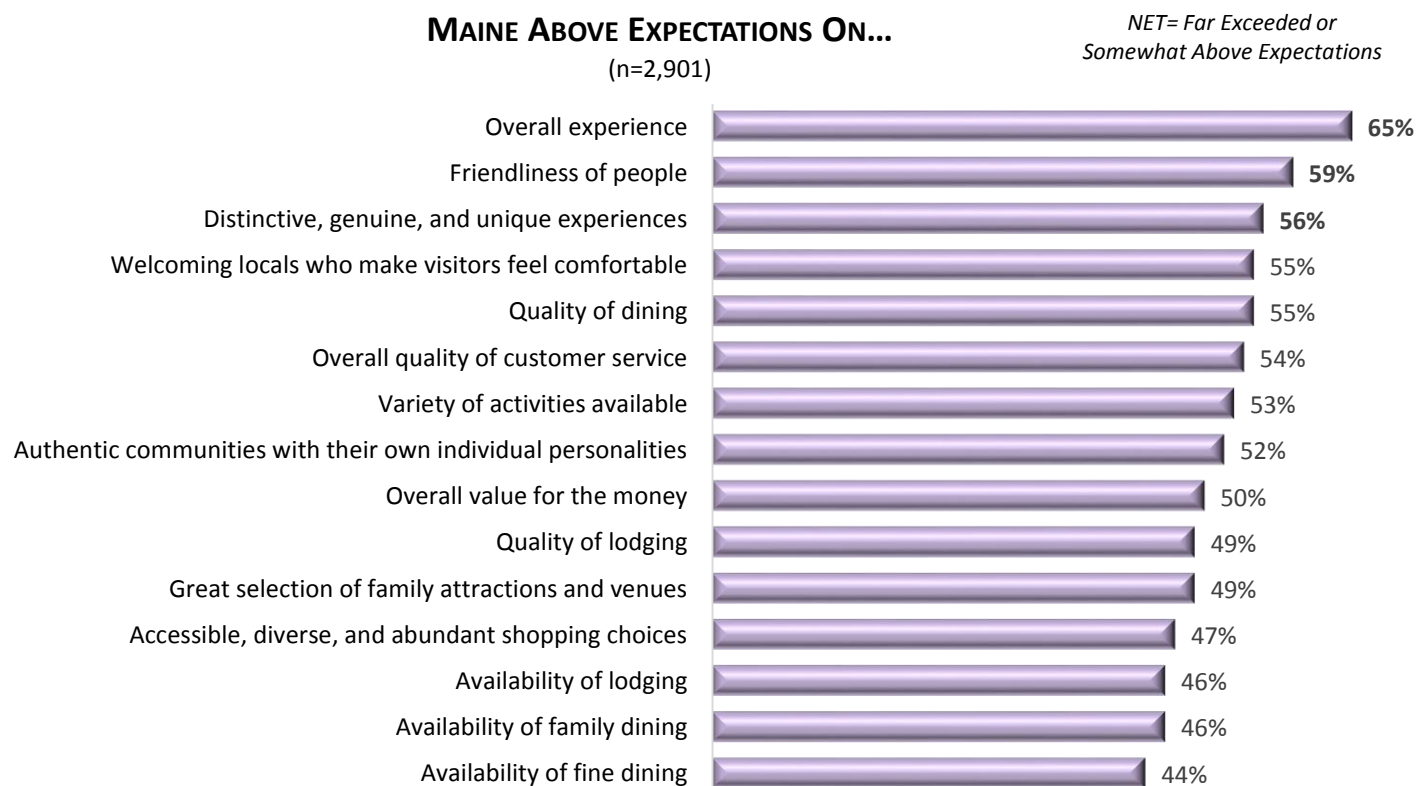
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Overnight Visitor Evaluations

Two-thirds of overnight visitors reported that Maine exceeded their expectations for the overall experience it provided.

- After overall experience, visitor expectations were most likely to be exceeded by the friendliness of Maine's people.
- Traveler groups more likely to report that Maine exceeded their expectations on the majority of tested attributes include: Balanced Achievers, travelers staying in paid accommodations, and residents of Mid-Atlantic states.



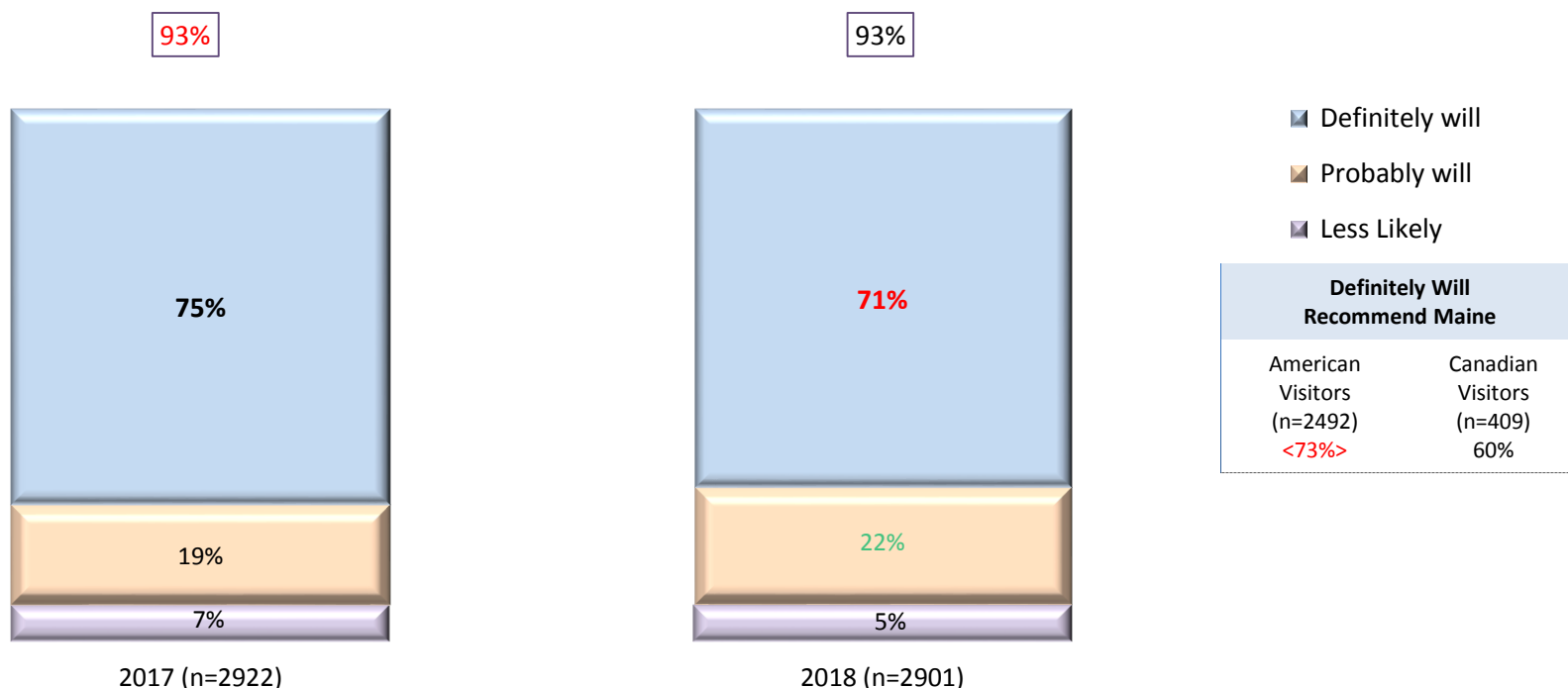
Q41. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

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

- Domestic overnight visitors were more likely than Canadian visitors to indicate that they definitely will recommend Maine as a vacation destination.

LIKELIHOOD TO RECOMMEND MAINE



Q45. How likely will you be to recommend Maine as a vacation destination to friends or relatives?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

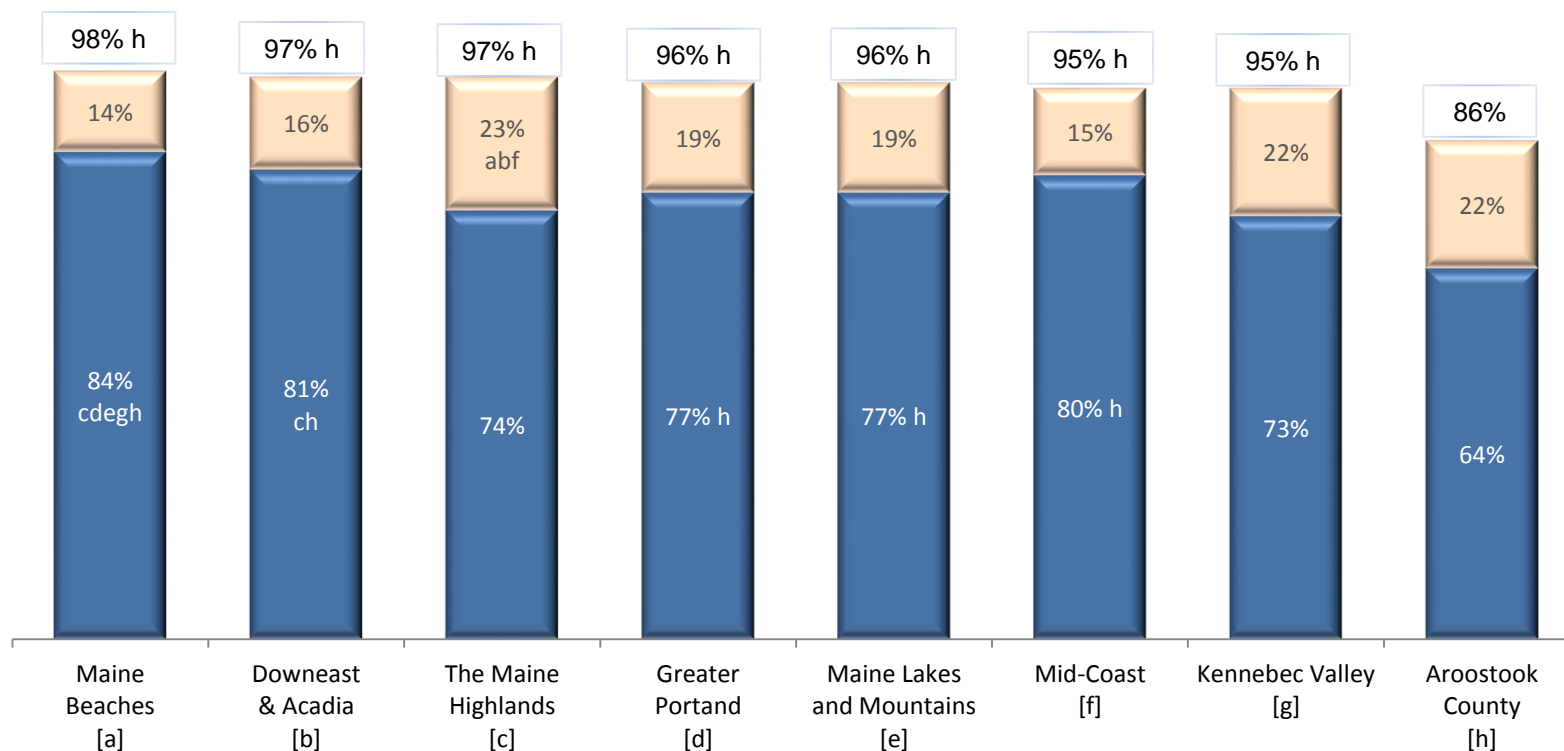
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Travelers listing the Maine Beaches region as their primary destination were more likely to state that they definitely will recommend that region to friends or relatives, as compared to visitors listing any of the other regions as their primary destination.
- Though still very high, reported levels of intent to recommend were lowest among Aroostook County visitors.

LIKELIHOOD OF RECOMMENDING

■ % Definitely Will ■ % Probably Will

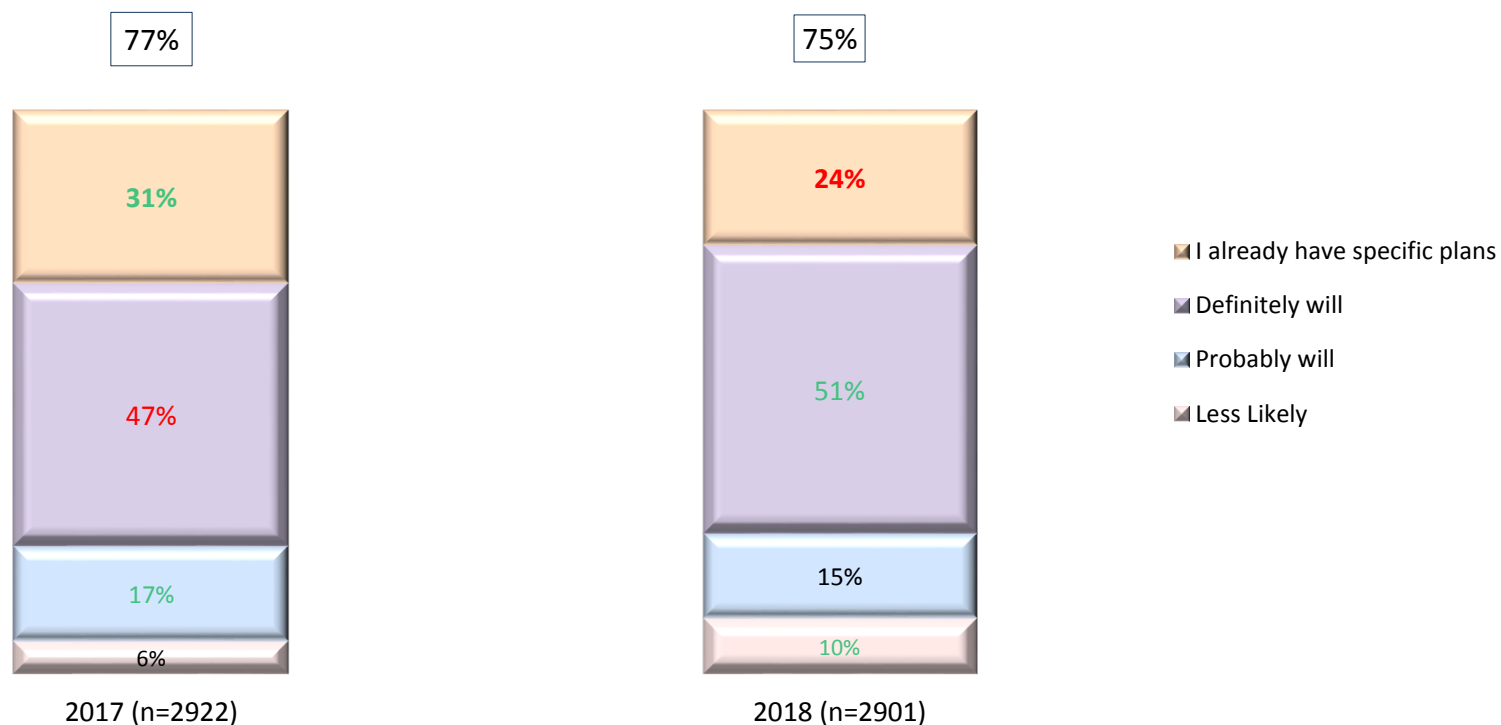


Q29. How likely will you be to recommend the [primary region visited] region to friends or relatives?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Future intent to visit Maine remains high among overnight visitors.

LIKELIHOOD TO TRAVEL TO MAINE IN NEXT TWO YEARS



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

OVERNIGHT VISITORS	
Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit	
Americans (n=2492) <76%>	Canadians (n=409) 67%
New England Resident (n=1030) <83%>	Mid-Atlantic Resident (n=1300) 69%
Paid Accommodations (n=2115) 74%	Unpaid Accommodations (n=786) <79%>
First-time Visitors (n=766) 61%	Repeat Visitors (n=2135) <80%>
Kids on Trip (n=960) <82%>	No Kids (n=1941) 72%

OVERNIGHT VISITORS		
Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit		
Balanced Achievers (n=1204) a 83% bc	Genuine Originals (n=857) b 74%	Social Sophisticates (n=217) c 72%



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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Visitors are most likely to view Maine's natural outdoor features and scenery as unique qualities that other destinations do not offer.

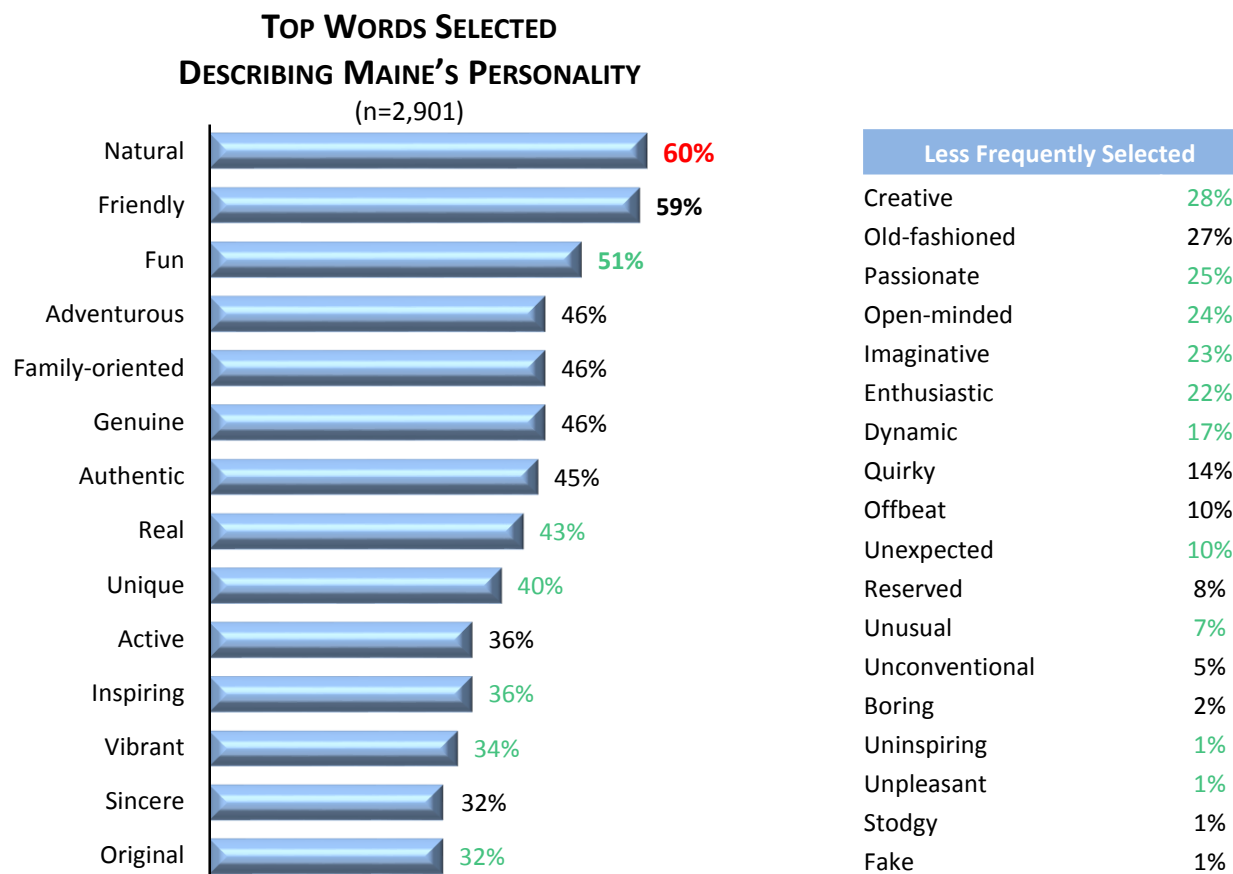
- Canadian visitors were more likely to be drawn to Maine's friendly people and shopping opportunities, while American visitors were more likely to be influenced by Maine's beaches/ocean, mountains/nature, good food, and quiet/peaceful environment.

UNIQUE MAINE QUALITIES:*	2018 TOTAL (n=2901)	Visitor Origin	
		U.S. (n=2492) a	Canada (n=409) b
Beaches/ocean/lakes/coast	19%	20% b	14%
Scenery/ocean views/foilage	17%	17%	15%
Mountains/nature/wildlife	16%	17% b	11%
Friends/relatives live here	11%	12%	9%
Lobster/seafood	11%	11%	10%
Quiet/peaceful/relaxing	7%	8% b	5%
Good food/dining	7%	8% b	5%
Friendly people	6%	5%	9% a
Shopping	5%	5%	7% a

* Only responses mentioned by at least 5% of travelers are listed.



“Natural” and “Friendly” remain the top words chosen to describe Maine’s personality.



Q47. If Maine were a person, which of the following words would you choose to describe its personality?

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

DAY VISITORS



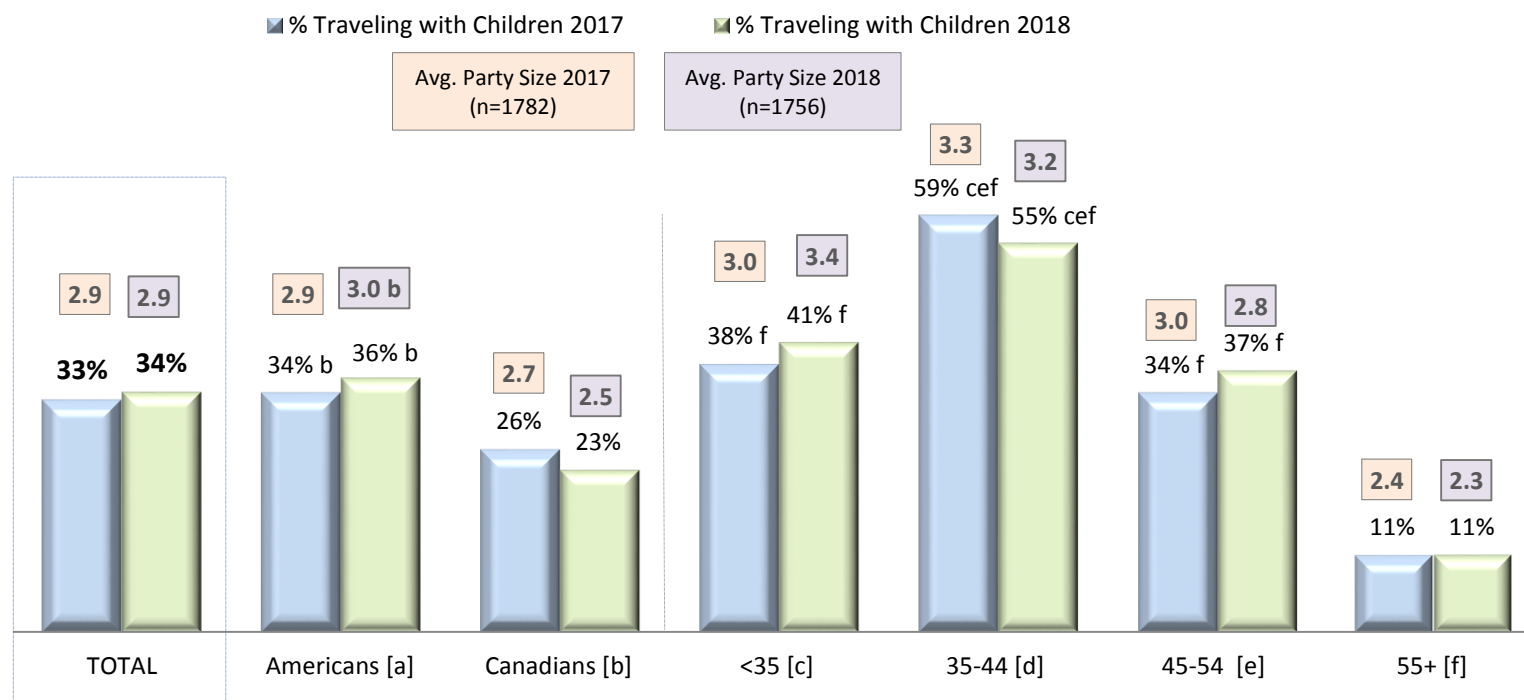


Day Visitor Travel Logistics

Similar to overnight visitors, the typical day visitor to Maine traveled in a party of three, and one-third traveled with children.

- Americans traveled in larger parties than Canadians, on average, and were also more likely to be traveling with children.
- Visitors between the ages of 35 and 44 were the most likely to be traveling with children.

TRAVEL PARTY SIZE AND COMPOSITION



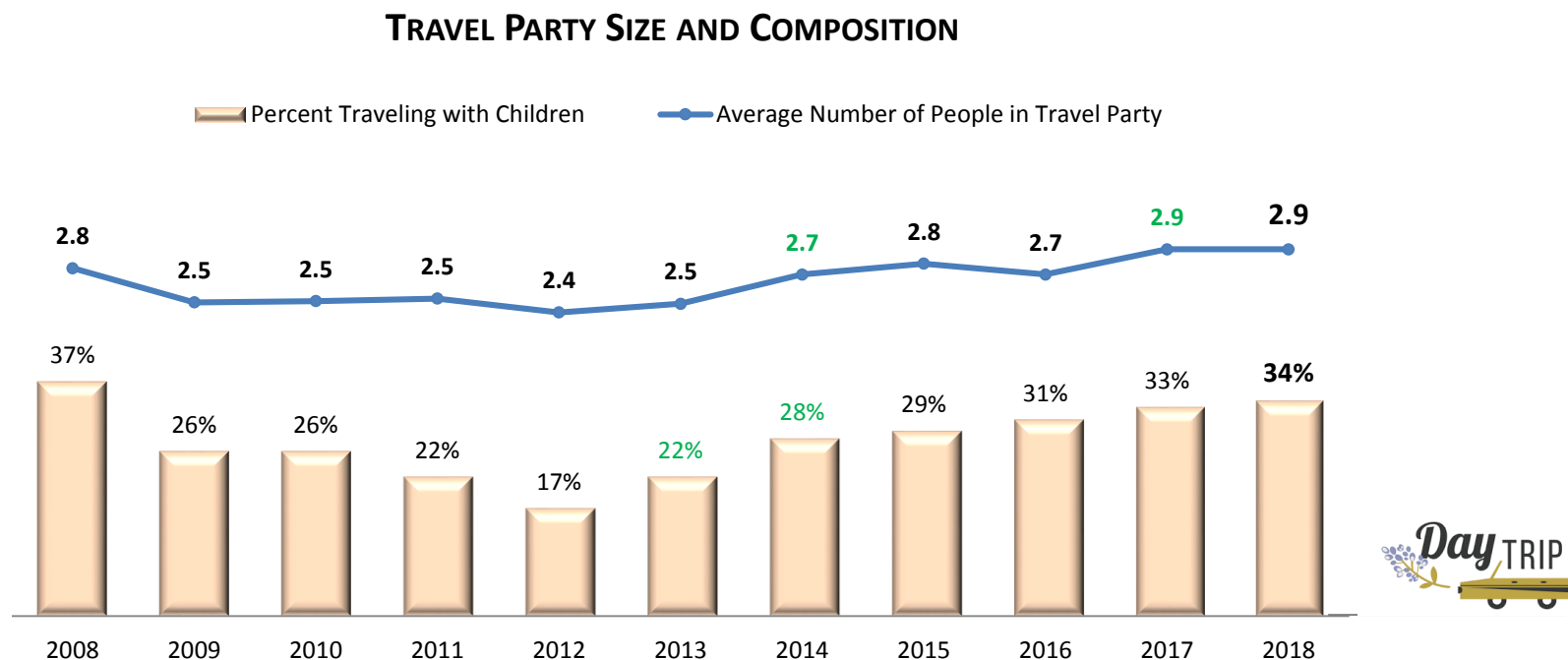
Q15. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q16. How many of these people were: Children?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

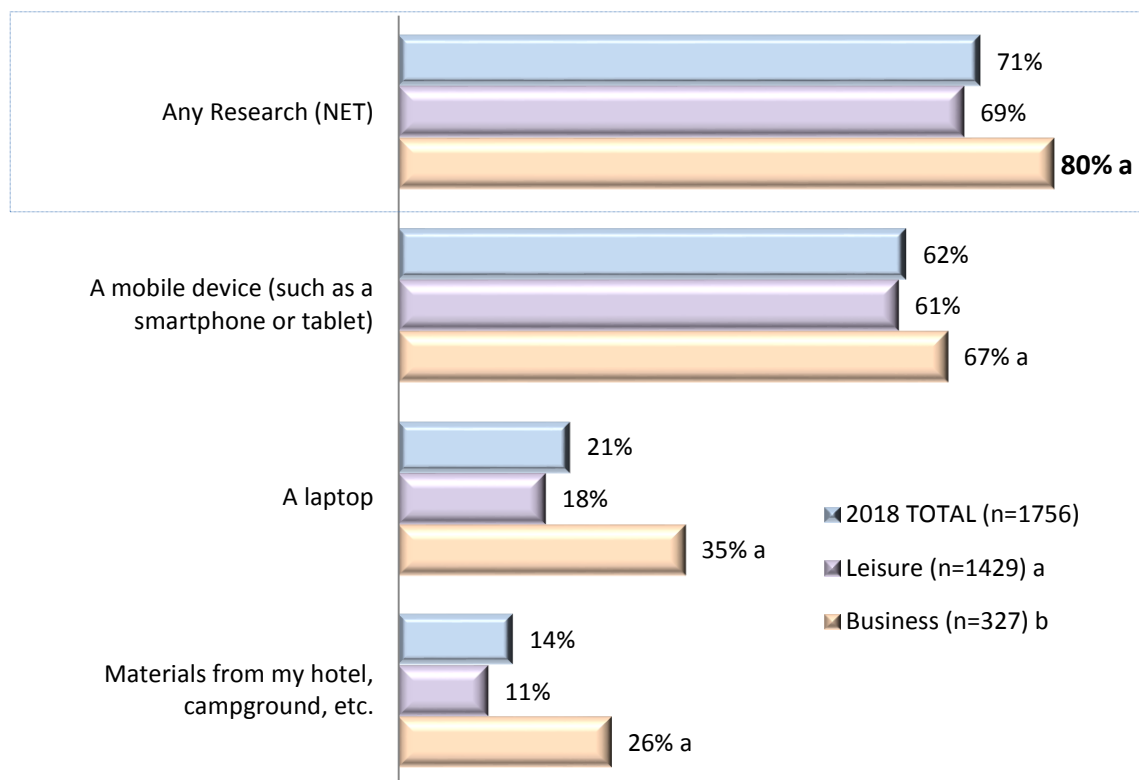
Average travel party size among day visitors to Maine has held steady since 2017.



Seven out of ten day visitors continued to research Maine after they arrived in the State, a lower proportion than among overnight visitors.

- Three out of five day visitors reported using a mobile device (smartphone or tablet) to continue researching places to go or things to do in Maine.
- Business travelers were more likely than leisure travelers to continue researching Maine during their visit.

TRIP RESEARCH WHILE IN MAINE



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

First-time Visitor (n=110) <92%>	Repeat Visitor (n=1646) 70%
<45 yrs (n=976) <81%>	45+ yrs (n=780) 61%
Kids on Trip (n=604) <77%>	No Kids (n=1152) 68%

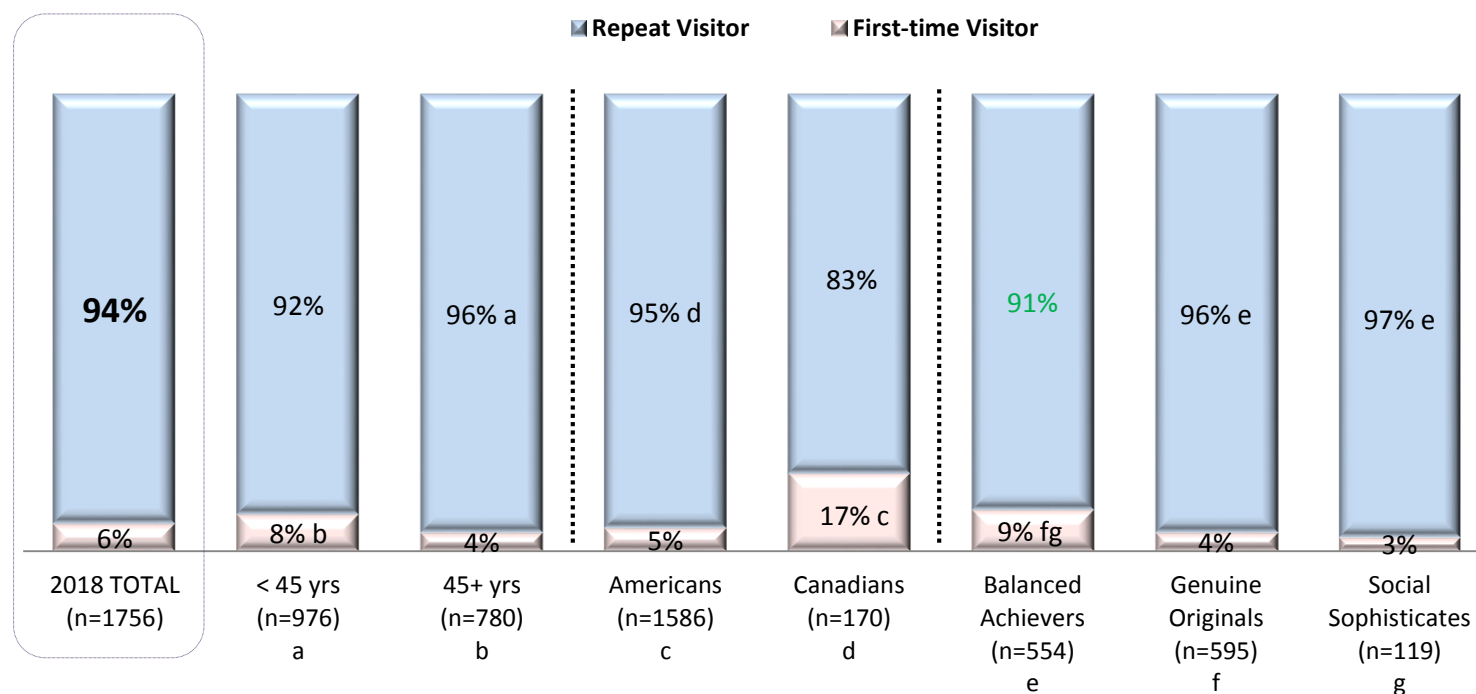
Q25. Once you arrived in Maine did you use any of the following to continue researching places to go or things to do during your visit? <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Day visitors exhibited strong loyalty, with 94% being repeat visitors.

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

REPEAT VS. FIRST TIME VISITORS



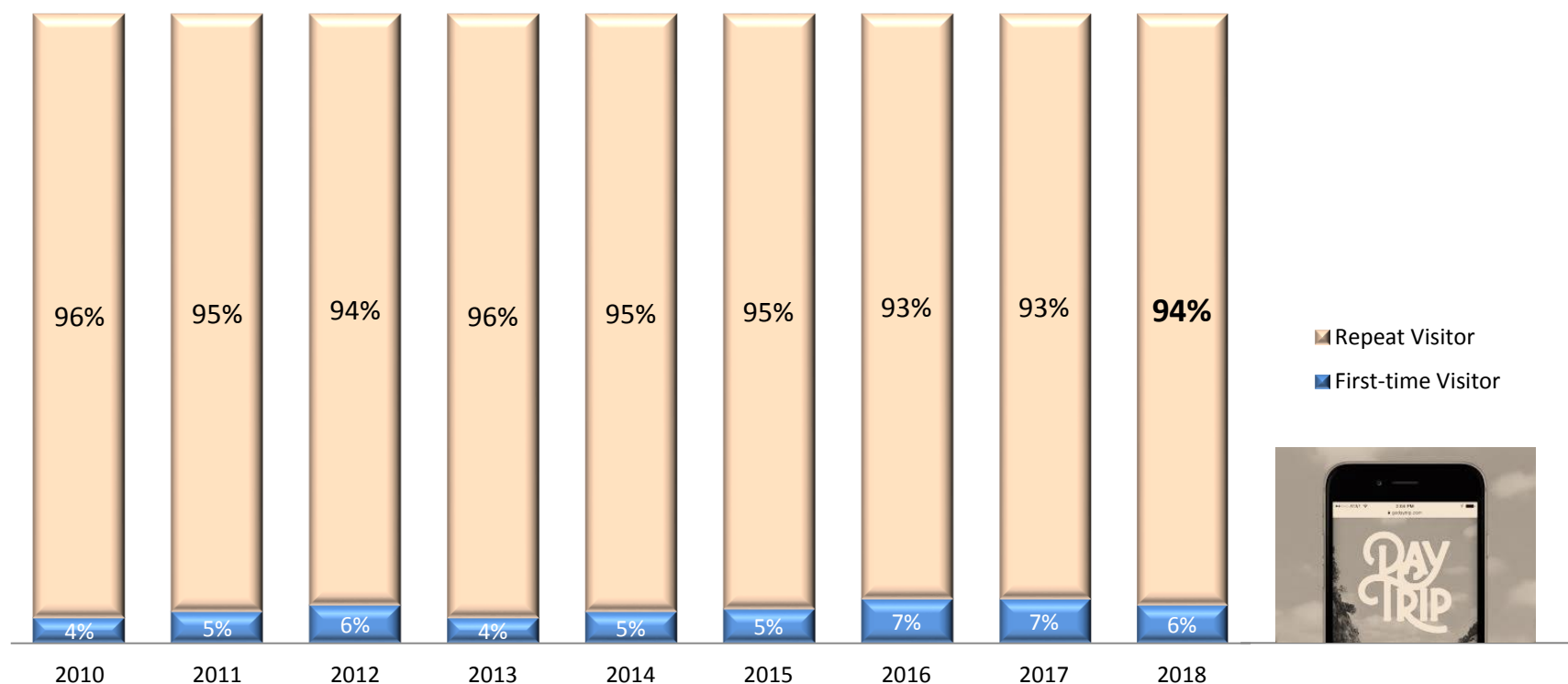
Q10. Was this your first trip to Maine?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

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

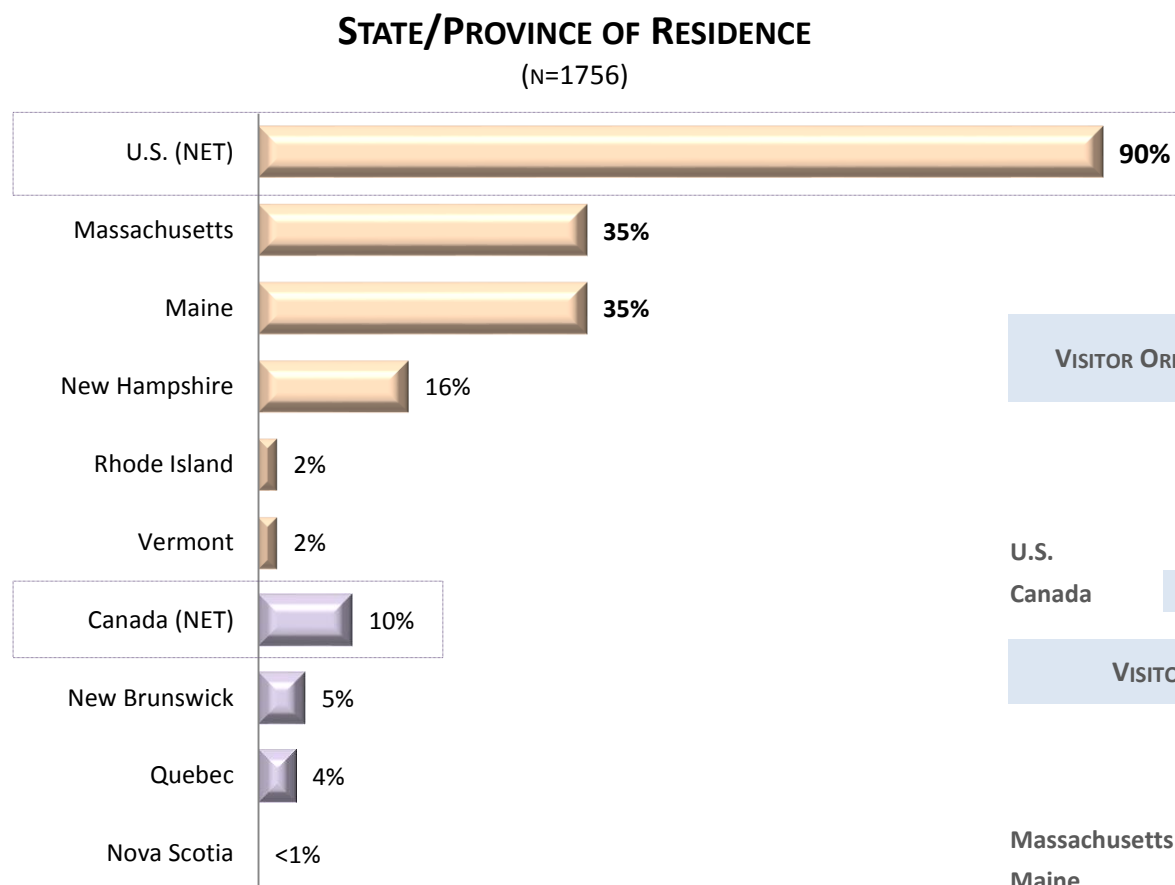
REPEAT VS. FIRST-TIME VISITORS TREND 2010 TO 2018





Day Visitor Origin

The highest proportions of day visitors hailed from Massachusetts and Maine.



VISITOR ORIGIN BY FIRST-TIME/REPEAT VISITOR

	First-time Visitor (n=110) [a]	Repeat Visitor (n=1646) [b]
U.S.	74%	91% a
Canada	26% b	9%

VISITOR ORIGIN BY TRAVELER TYPE

	Leisure (n=1429) [a]	Business (n=327) [b]
Massachusetts	38% b	24%
Maine	32%	51% a
New Hampshire	17% b	11%

Q2. In which state or province do you live?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

The relative proportions of day visitors from each state or province in 2018 remained consistent with 2017, after experiencing some shifts in prior years.

DAY VISITOR ORIGIN

2008 - 2018

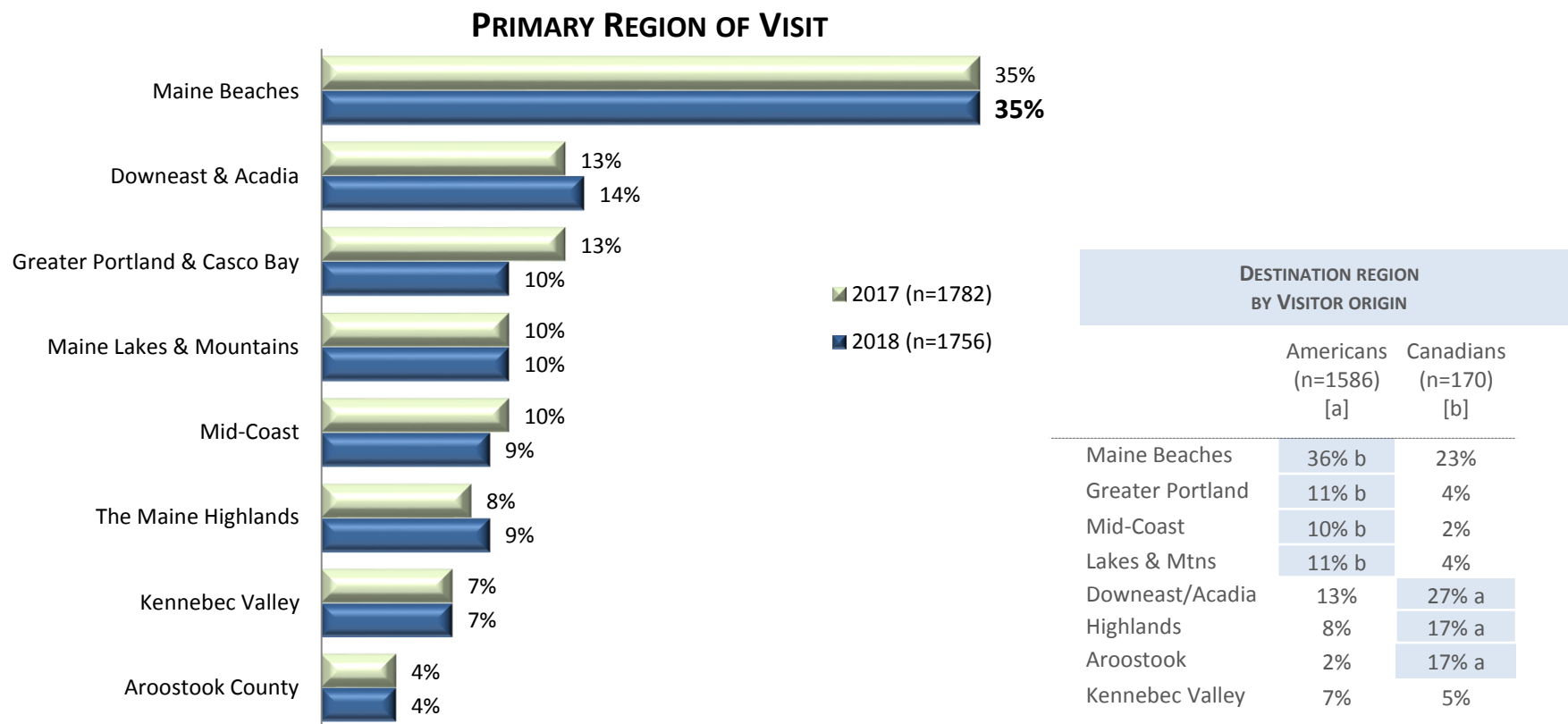
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Maine	35%	32%	26%	31%	29%	35%	39%	36%	35%	37%	47%
Massachusetts	35%	37%	43%	41%	43%	39%	34%	37%	37%	33%	23%
New Hampshire	16%	18%	16%	15%	15%	14%	15%	15%	14%	15%	13%
New Brunswick	5%	5%	5%	5%	6%	6%	7%	6%	7%	7%	11%
Quebec	4%	5%	7%	5%	3%	1%	2%	2%	2%	3%	4%
Vermont	2%	1%	2%	1%	1%	1%	2%	1%	1%	2%	1%
Rhode Island	2%	2%	1%	1%	2%	2%	2%	2%	2%	2%	1%
Nova Scotia	--	--	1%	<1%	--	<1%	--	--	1%	--	--



Day Visitor Experience in Maine

Once again, day visitation centered around the Maine Beaches region in 2018.

- Regional destination patterns among 2018 day visitors did not vary from those seen in 2017.
- American and Canadian day visitors differed in the primary regions they chose to visit in Maine. Canadian day visitors were once again more likely than American visitors to be drawn to the Downeast/Acadia region, the Maine Highlands, and Aroostook County – the three regions that border Canada.



Q21. What region in Maine was your primary destination?

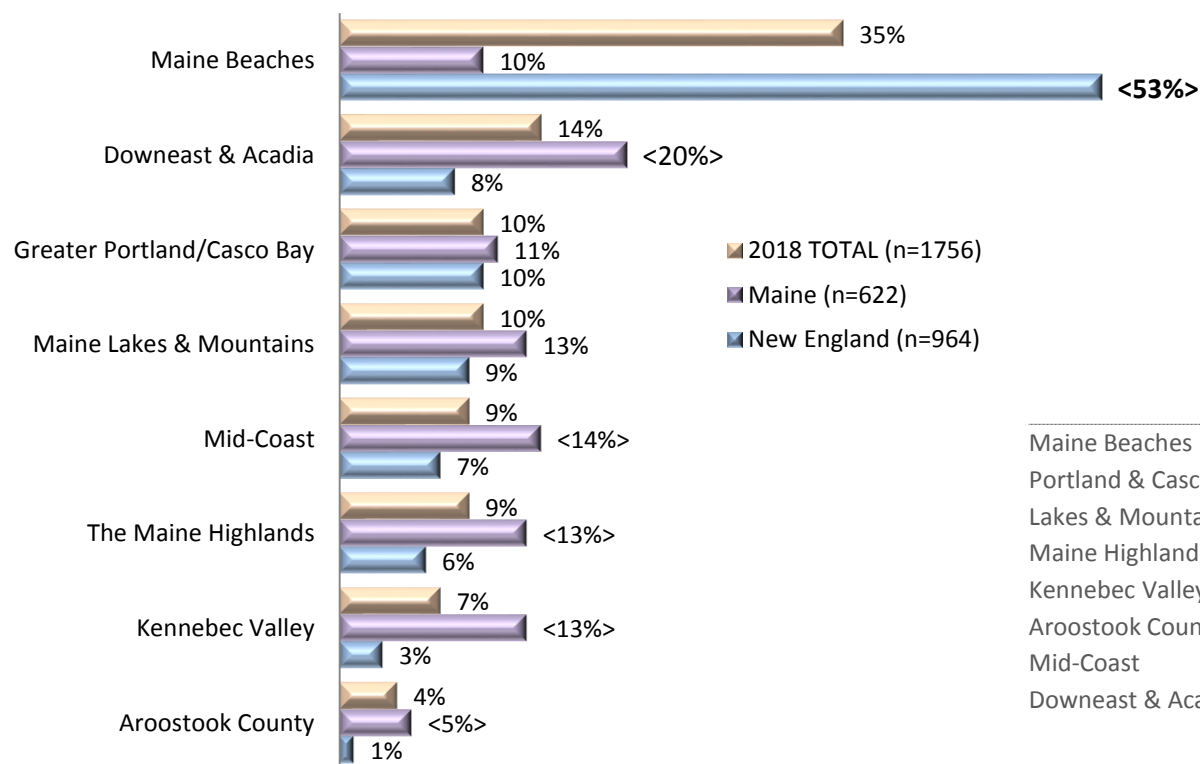
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Domestic visitors' primary regional destinations were influenced by whether or not they live in Maine.

- When compared to residents of Maine, residents of other New England states were much more likely to visit the *Maine Beaches* region. In-state visitors were more likely to visit most of the remaining regions within Maine.
- Day visitors categorized as Social Sophisticates were more likely than those categorized as Balanced Achievers or Genuine Originals to visit the Maine Beaches region and less likely to visit the Lakes & Mountains region. Genuine Originals were more likely to visit the Greater Portland region, while Balanced Achievers were more likely to visit the Maine Highlands.

PRIMARY REGION BY U.S. RESIDENCE



DESTINATION REGION BY SEGMENT TYPE

	Balanced Achievers (n=554) [a]	Genuine Originals (n=595) [b]	Social Sophisticates (n=119) [c]
Maine Beaches	33%	33%	55% ab
Portland & Casco Bay	8%	13% ac	5%
Lakes & Mountains	10% c	12% c	4%
Maine Highlands	12% bc	8%	4%
Kennebec Valley	8%	5%	4%
Aroostook County	4%	4%	3%
Mid-Coast	8%	10%	9%
Downeast & Acadia	16%	13%	14%

Q21. What region in Maine was your primary destination?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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



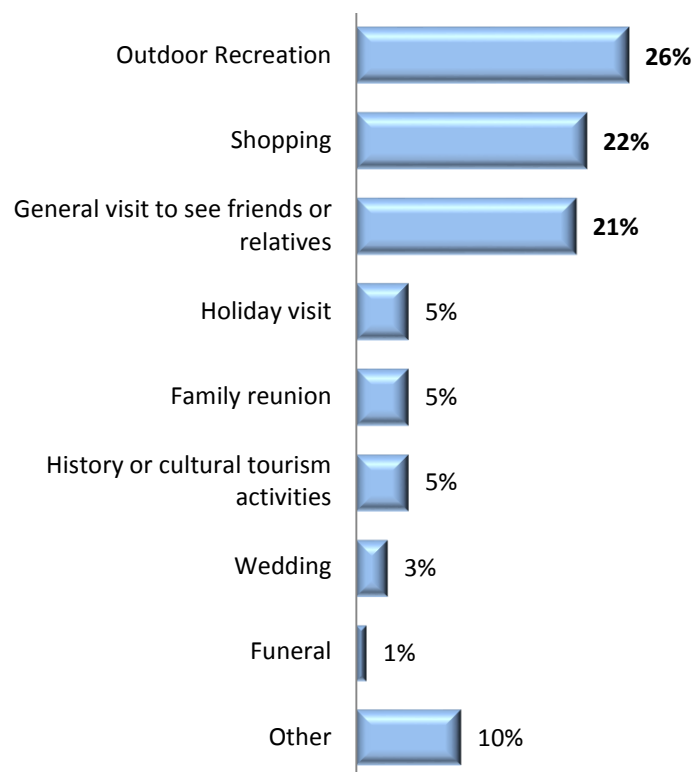
Day Visitor Interest Areas and Activities

At least one-fifth of leisure day visitors were in Maine for *outdoor recreation, shopping, or a general visit to friends or relatives*.

- Canadian day visitors were more likely than domestic day visitors to be visiting Maine for shopping or a holiday visit.
- American travelers were more likely than Canadians to be visiting for outdoor recreation or a general visit to friends/relatives.

PRIMARY PURPOSE OF DAY LEISURE TRIPS

(N=1624)

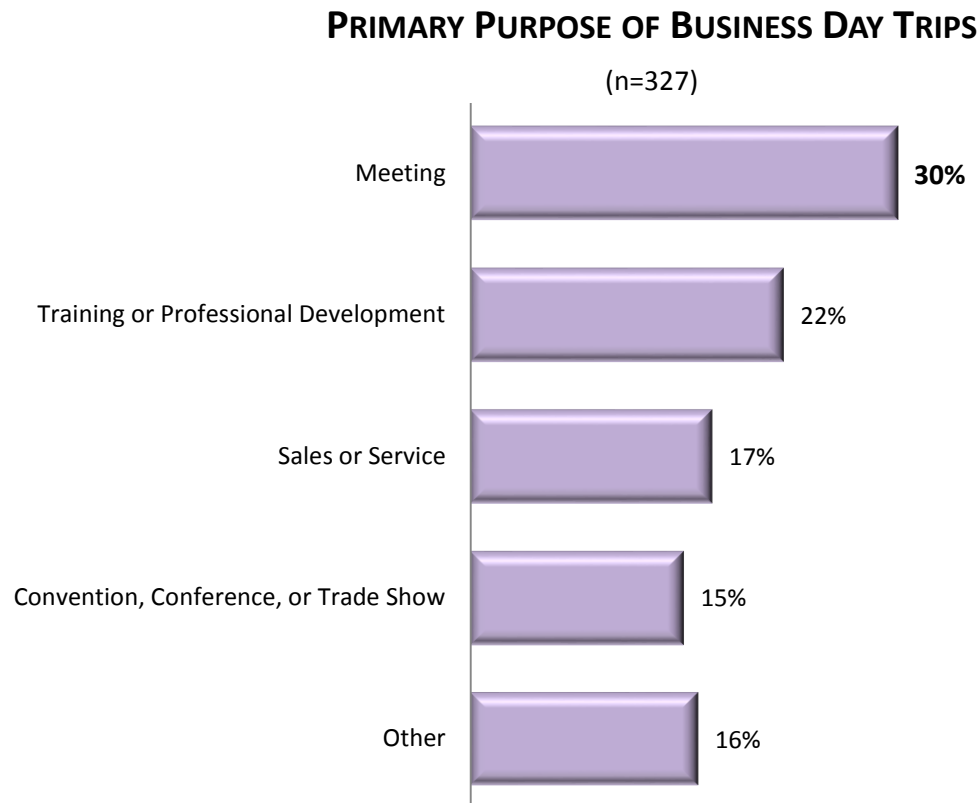


	PURPOSE OF TRIP BY SUBGROUPS	
	American Visitor (n=1472) a	Canadian Visitor (n=152) b
Outdoor recreation	28% b	11%
General visit to see friends/relatives	23% b	6%
Holiday visit	5%	11% a
Shopping	19%	53% a

	Balanced Achievers (n=499) a	Genuine Originals (n=565) b	Social Sophisticates (n=114) c
History/cultural tourism	5%	9% ac	4%

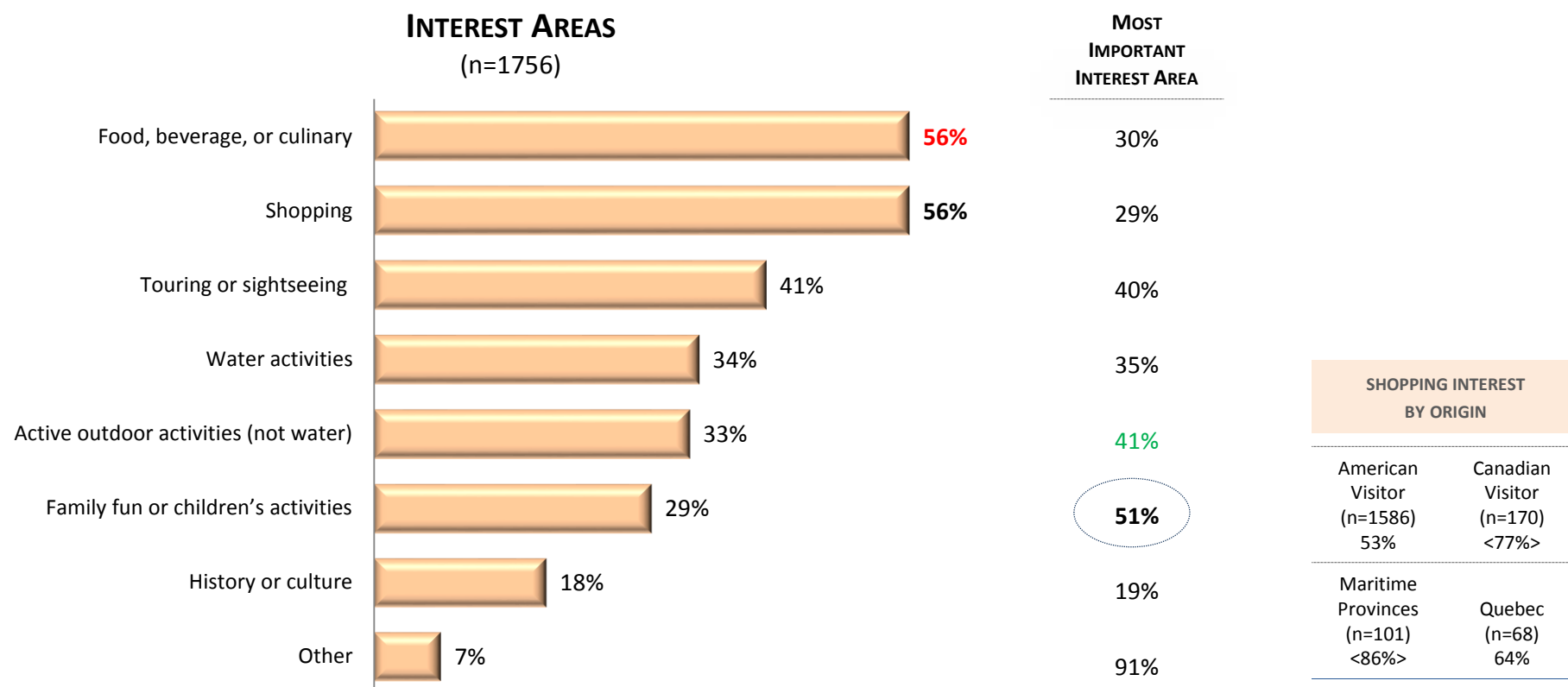
Q9. What was the primary purpose of your most recent day leisure trip in Maine?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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



Food/beverage/culinary activities and shopping were the most popular interest areas of day visitors in 2018.

- Among all seven interest areas specified in the survey, family fun/children's activities are the most likely to be considered the most important interest in their decision to come to Maine.
- Canadian day visitors were more likely than domestic day visitors to be interested in shopping while visiting Maine, particularly those residing in the Maritime provinces.

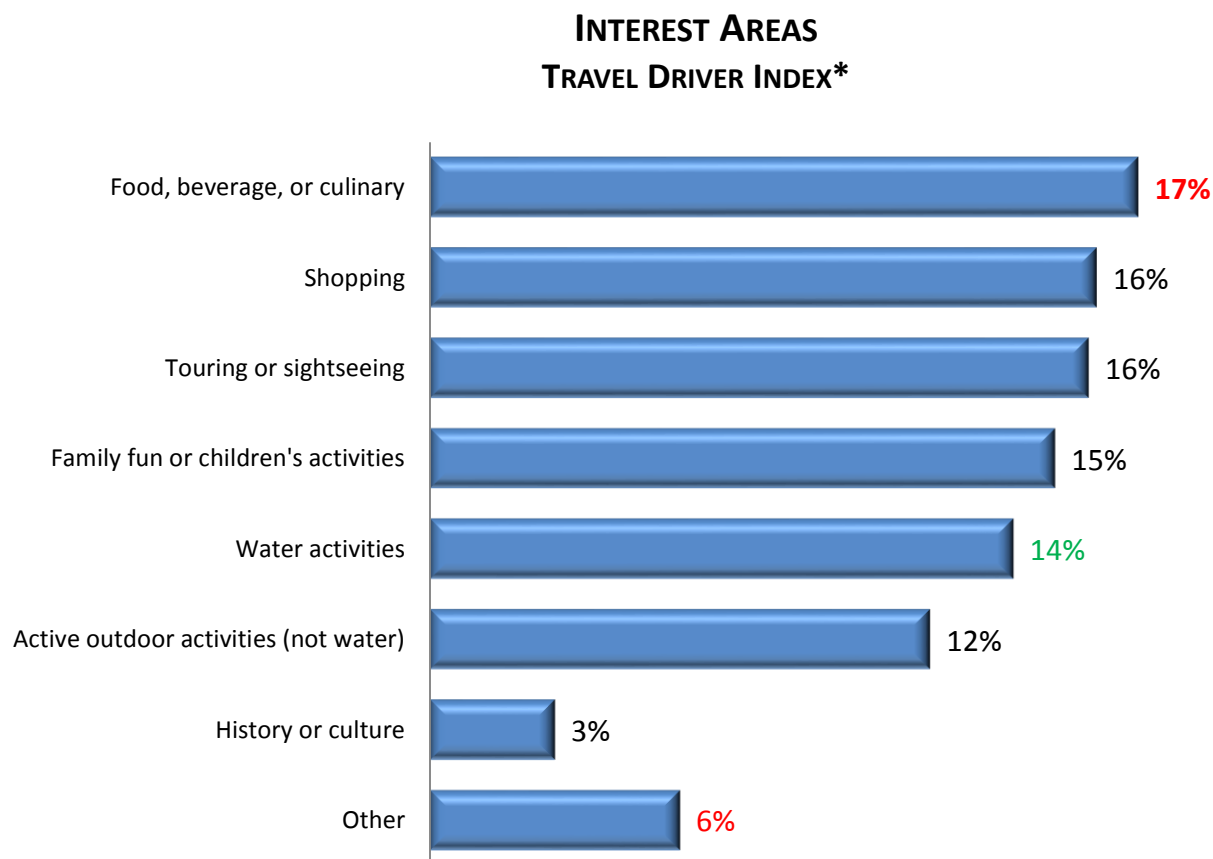


Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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. <>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

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



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

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

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

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

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

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

INTEREST AREA:	2018 TOTAL (n=1756)	Residence		Age		Visitor Segment		
		United States (n=1586) a	Canada (n=170) b	<45 yrs (n=976) c	45+ yrs (n=780) d	Balanced Achievers (n=554) e	Genuine Originals (n=595) f	Social Sophisticates (n=119) g
Food, beverage, or culinary	56%	57% b	42%	57%	55%	59%	57%	63%
Shopping	56%	53%	77% a	57%	56%	61% f	50%	65% f
Touring or sightseeing	41%	42% b	26%	40%	41%	47% g	47% g	33%
Active outdoor activities (not water)	33%	35% b	21%	41% d	25%	38%	37%	31%
Water Activities	34%	36% b	15%	37% d	30%	35%	39%	45%
Family fun or children's activities	29%	31% b	15%	38% d	21%	35% fg	24%	24%
History or culture	18%	18%	19%	18%	19%	24% g	20% g	10%
Other	7%	7% b	1%	4%	9% c	5%	7%	3%

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

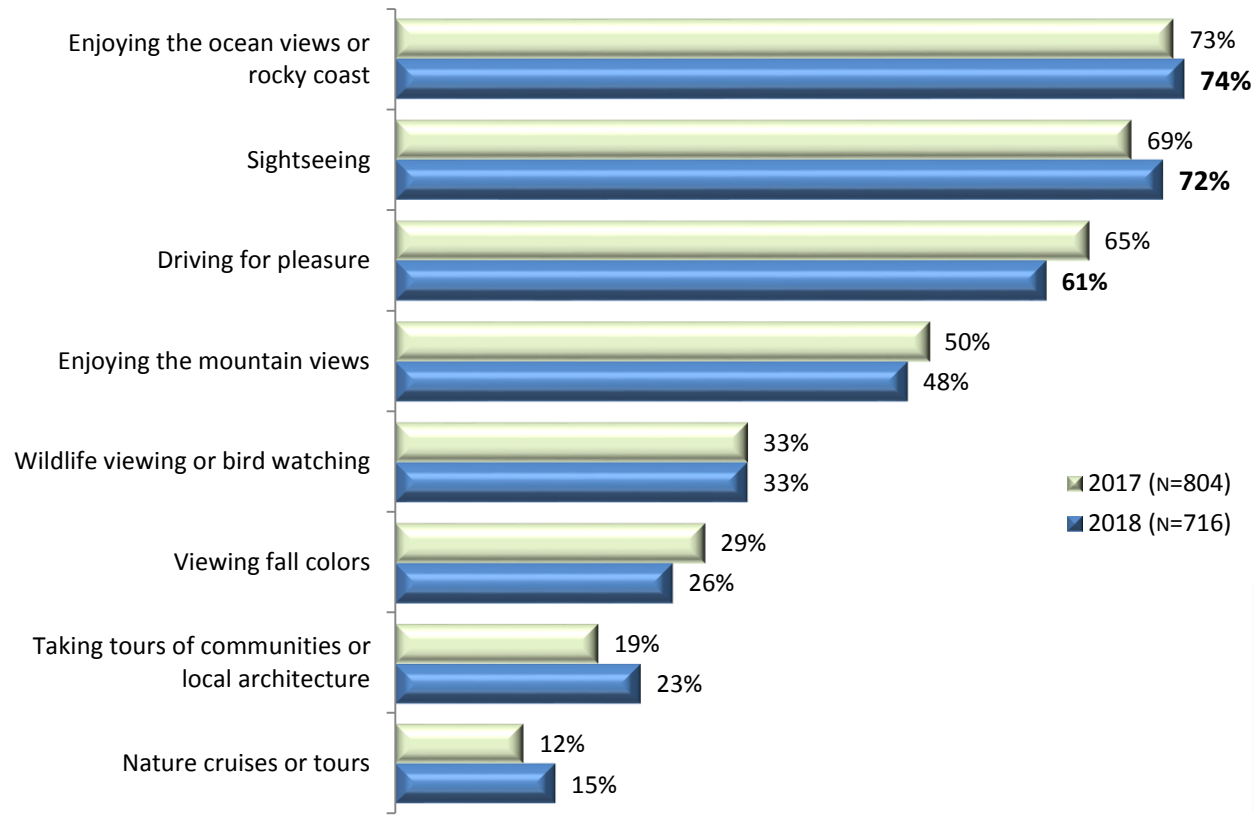
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Enjoying the ocean views or rocky coast and sightseeing were the most popular activities among day visitors interested in touring/sightseeing.

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

TOURING OR SIGHTSEEING ACTIVITIES

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

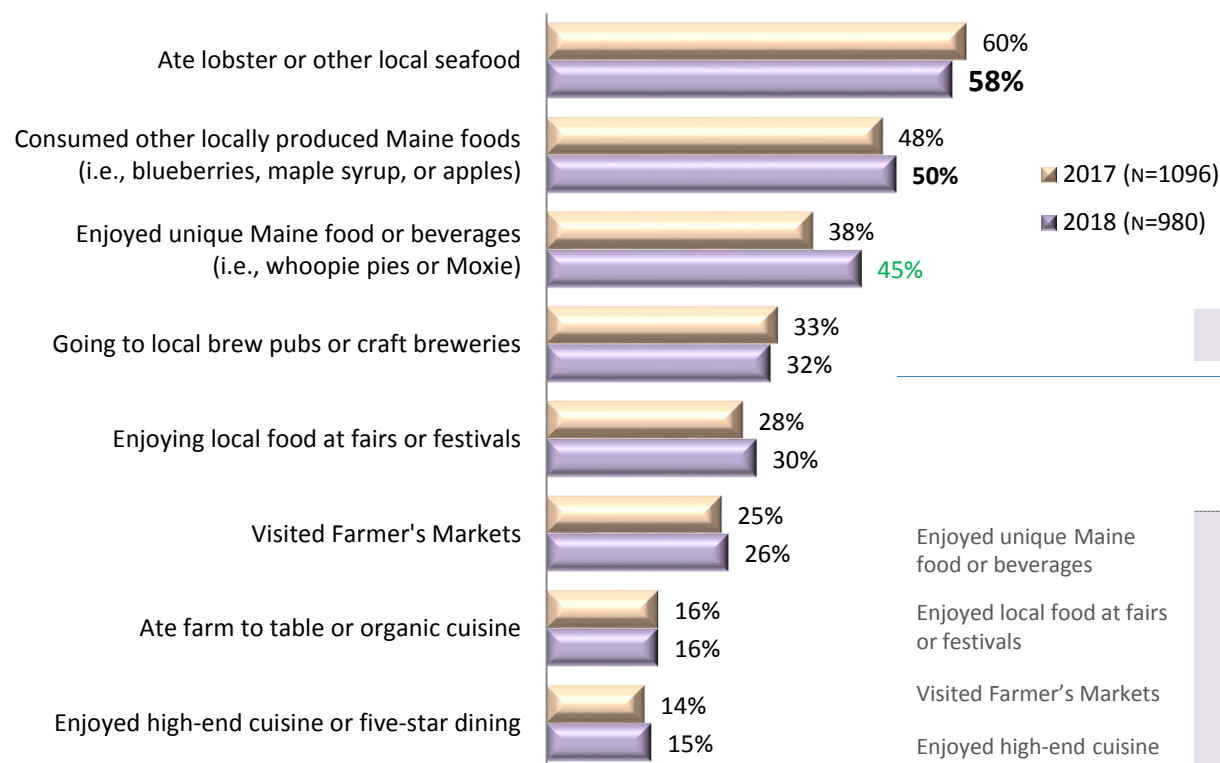


Eating lobster or other local seafood was the most popular activity among day visitors interested in food/beverage/culinary activities.

- Half of day visitors interested in food/beverage/culinary activities consumed non-seafood Maine foods while visiting, and nearly half enjoyed unique Maine food or beverages such as whoopie pies or Moxie.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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



FOOD ACTIVITIES BY SEGMENT

	Balanced Achievers (n=327) a	Genuine Originals (n=342) b	Social Sophisticates (n=75) c
Enjoyed unique Maine food or beverages	56% bc	44%	38%
Enjoyed local food at fairs or festivals	39% b	24%	25%
Visited Farmer's Markets	32% c	28% c	15%
Enjoyed high-end cuisine or five-star dining	22% b	14%	13%

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

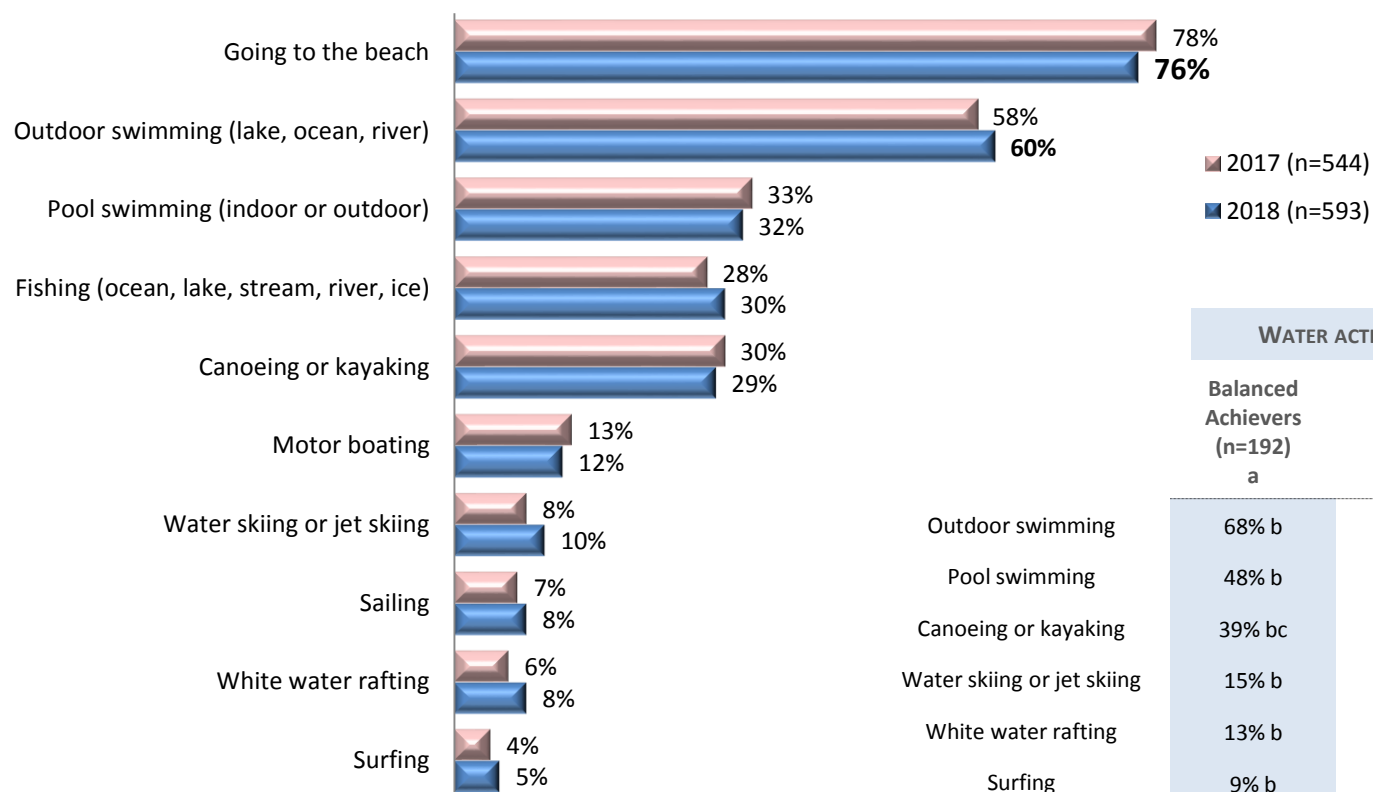
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Travelers categorized as Balanced Achievers were more likely than Genuine Originals to have participated in several water activities.

WATER ACTIVITIES

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



WATER ACTIVITIES BY SEGMENT TYPE

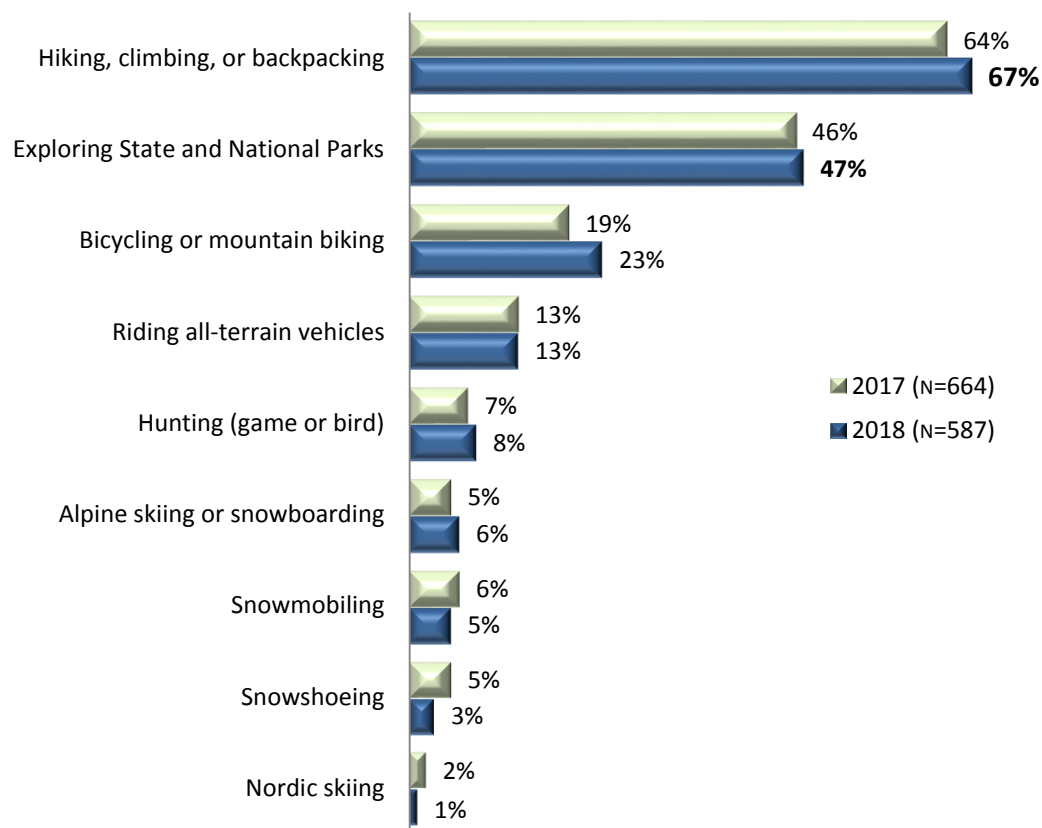
	Balanced Achievers (n=192) a	Genuine Originals (n=230) b	Social Sophisticates (n=54) c
Outdoor swimming	68% b	54%	68%
Pool swimming	48% b	19%	40% b
Canoeing or kayaking	39% bc	27%	19%
Water skiing or jet skiing	15% b	7%	10%
White water rafting	13% b	5%	5%
Surfing	9% b	3%	5%

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

- Nearly half of day visitors interested in non-aquatic outdoor activities explored State and National Parks while visiting Maine.

ACTIVE OUTDOOR ACTIVITIES (NON-WATER)

Base: Those who report active non-water outdoor 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.

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

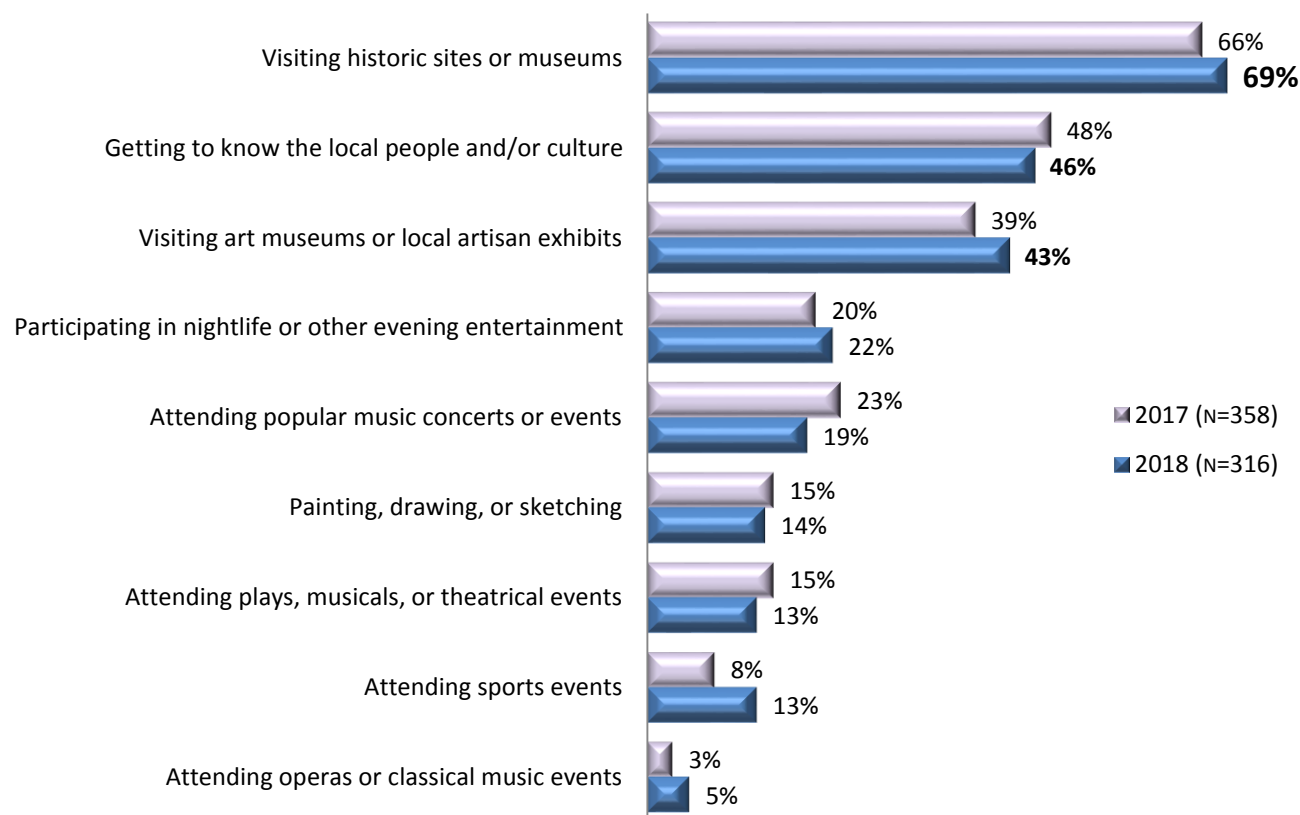
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Visiting historic sites or museums was the most popular pursuit among day visitors interested in history/culture.

- Getting to know the local people and/or culture and visiting art museums or local artisan exhibits were also popular activities.

HISTORY OR CULTURE ACTIVITIES

Base: Those who report history or culture 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.*

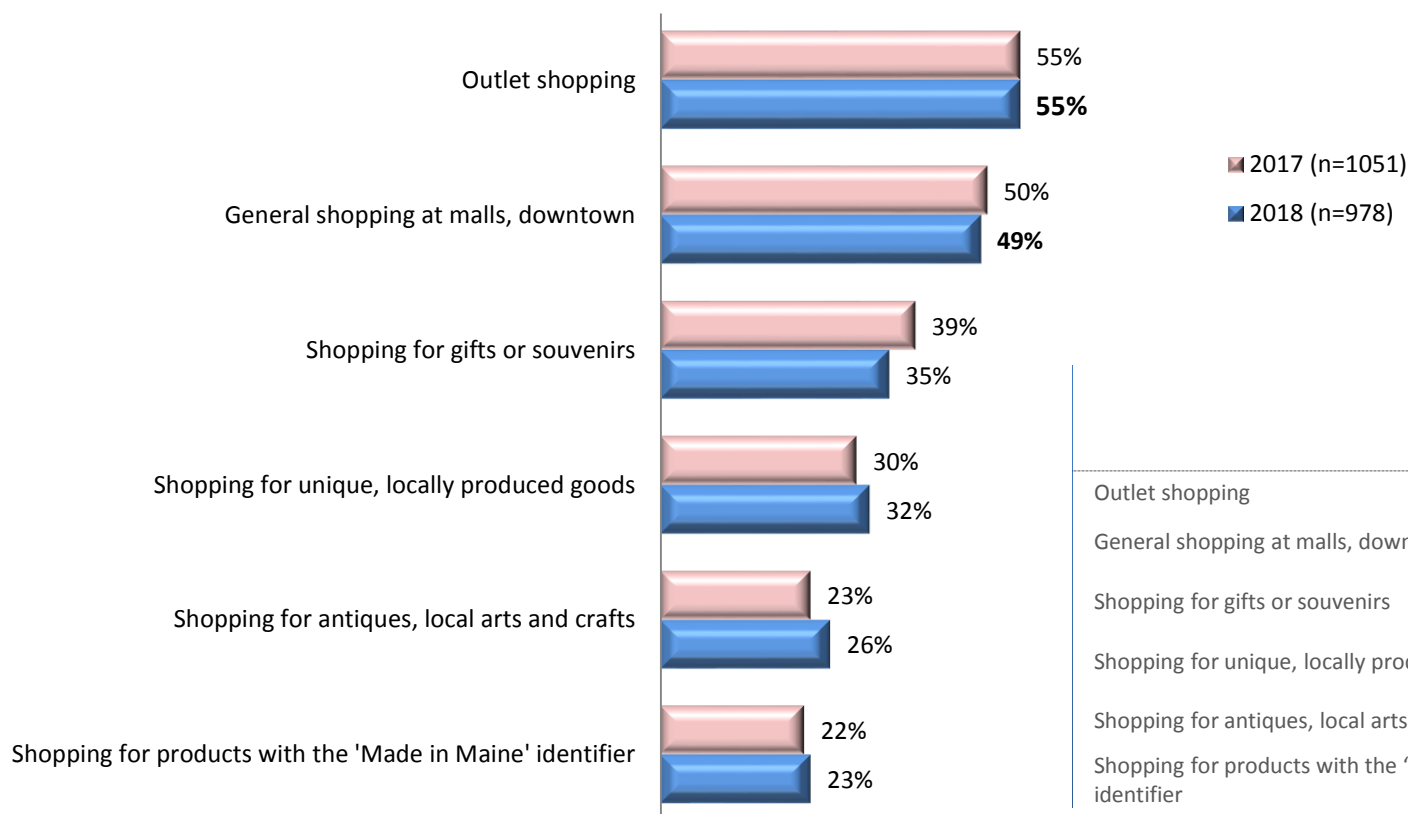
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

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

SHOPPING ACTIVITIES

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



SHOPPING BY ORIGIN

	Americans (n=847) a	Canadians (n=131) b
Outlet shopping	56% b	47%
General shopping at malls, downtown	46%	65% a
Shopping for gifts or souvenirs	37% b	23%
Shopping for unique, locally produced goods	34% b	23%
Shopping for antiques, local arts and crafts	28% b	14%
Shopping for products with the 'Made in Maine' identifier	24% b	12%

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

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

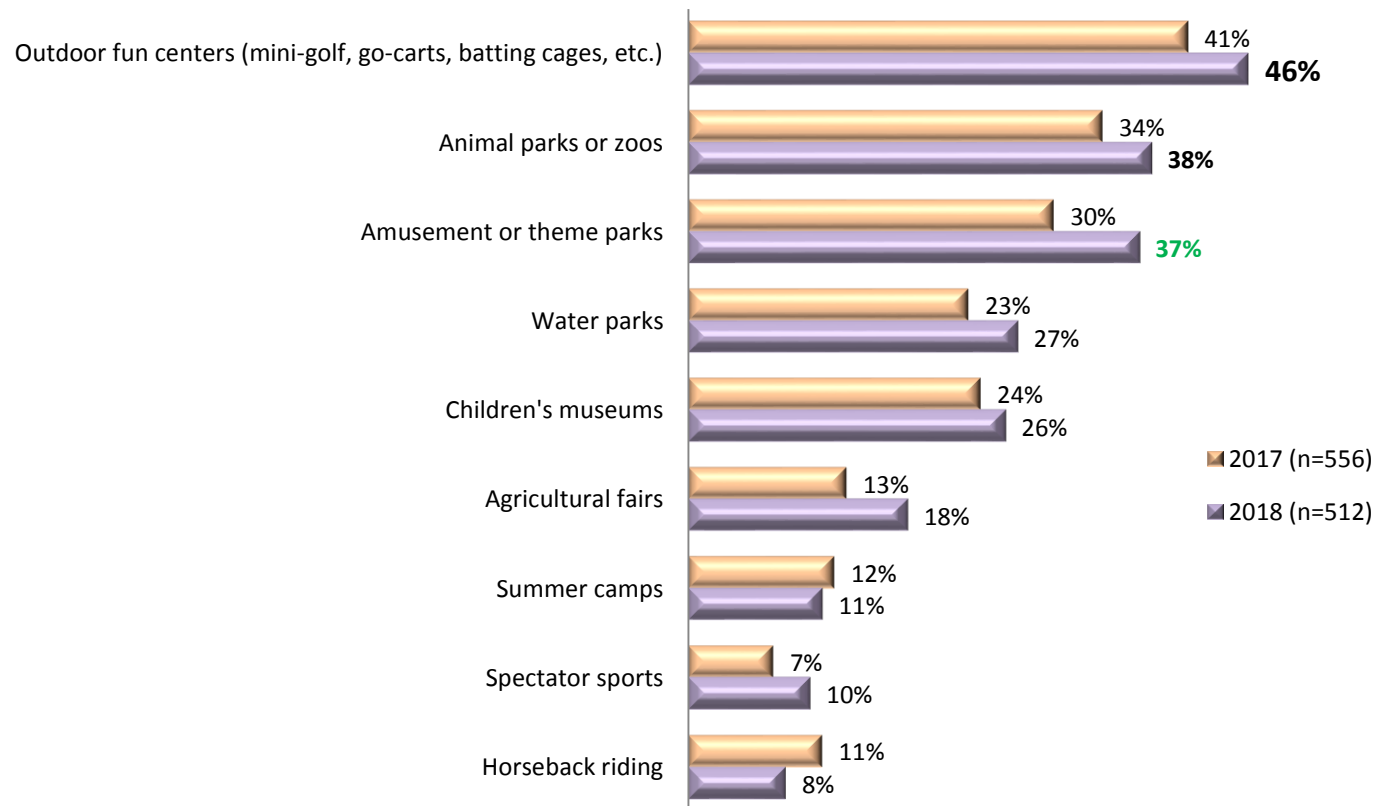
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

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

FAMILY FUN/CHILDREN'S ACTIVITIES

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



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

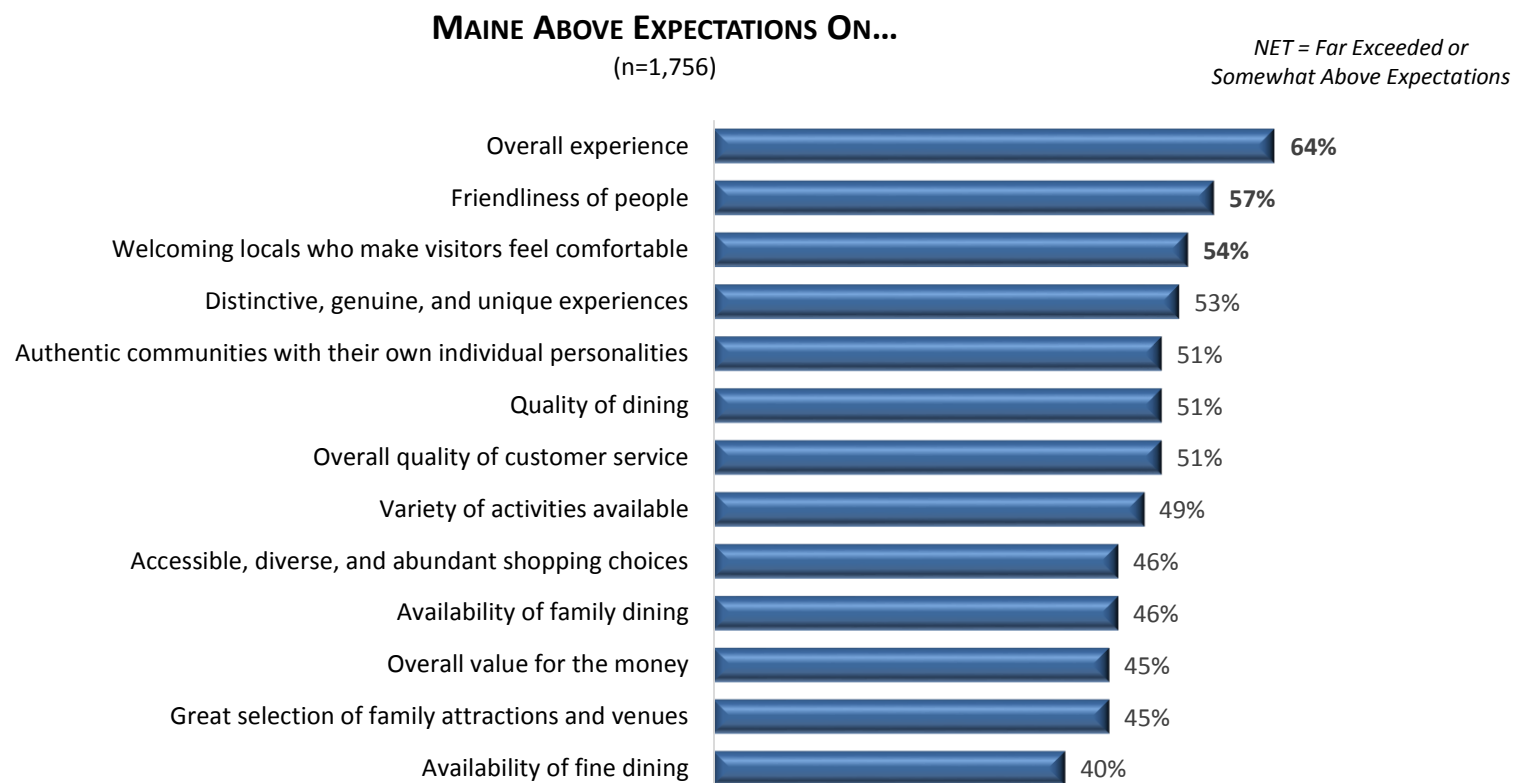
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Day Visitor Evaluations

Two-thirds of day visitors reported that their overall experience surpassed their expectations while visiting Maine.

- After overall experience, visitor expectations were most exceeded for the friendliness of Maine's people.
- Balanced Achievers were more likely than Genuine Originals or Social Sophisticates to report that Maine exceeded their expectations on nearly all tested attributes.



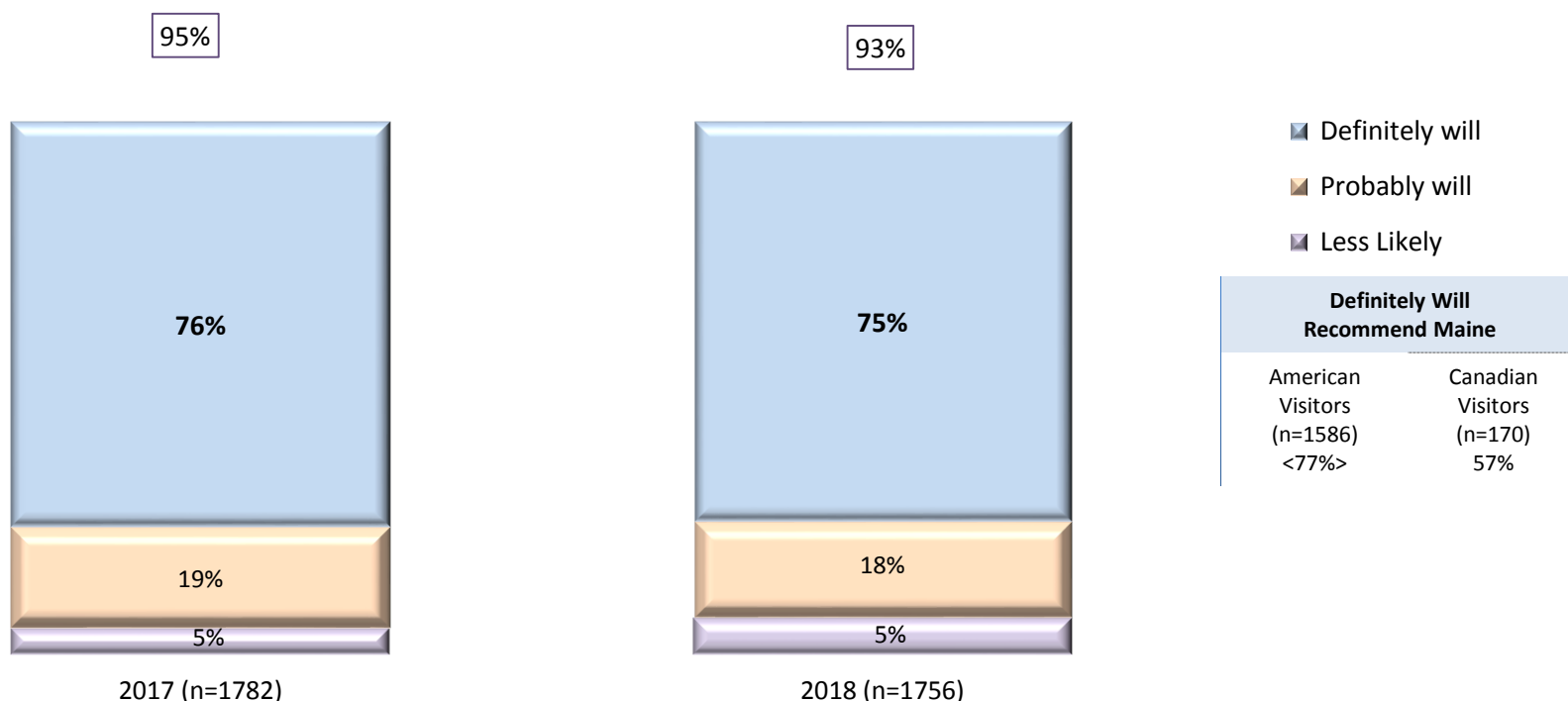
Q28. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

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

- Domestic day visitors were more likely than Canadian visitors to say they definitely will recommend Maine as a vacation destination.

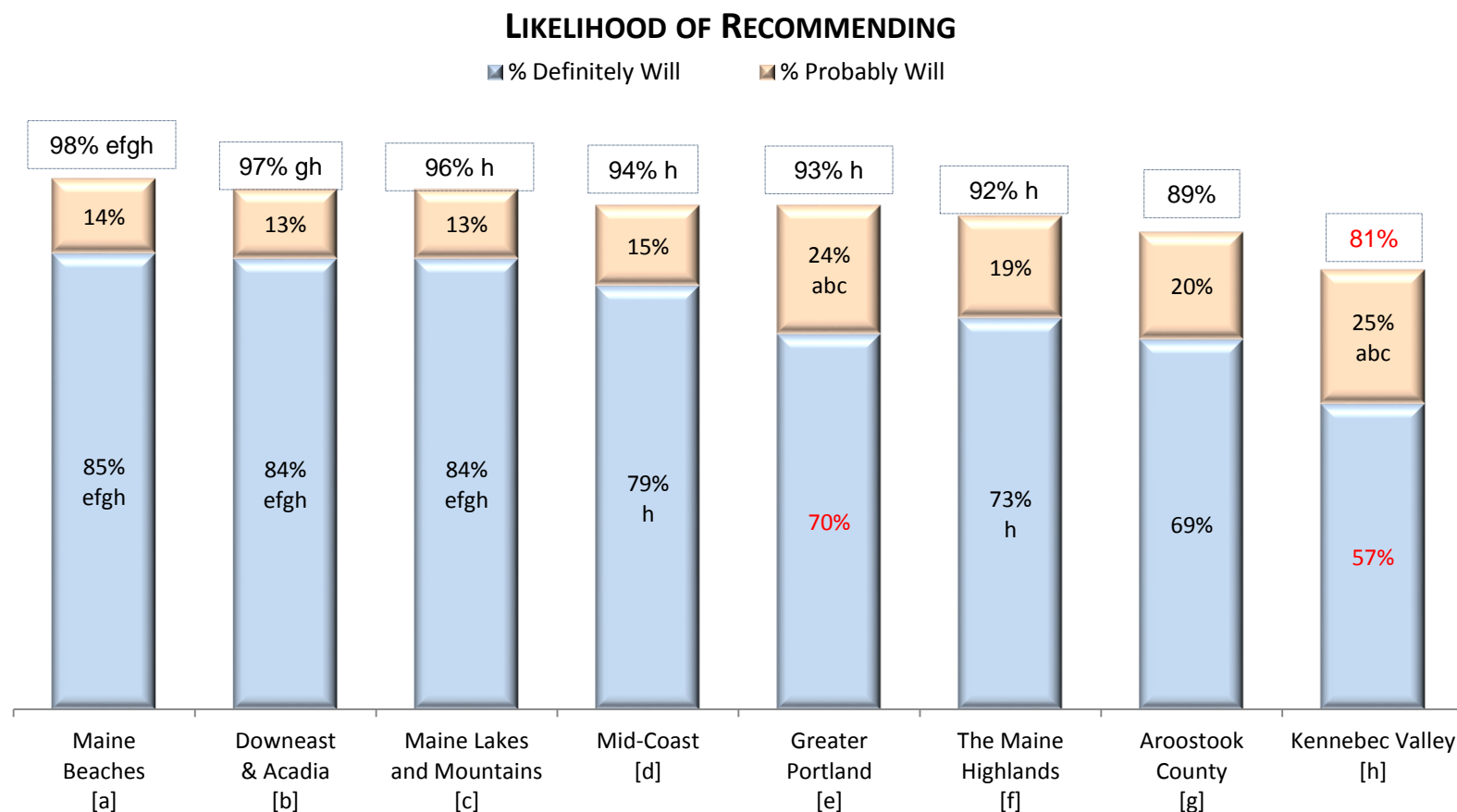
LIKELIHOOD TO RECOMMEND MAINE



Q33. How likely will you be to recommend Maine as a vacation destination to friends or relatives?
<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Day visitors show overwhelming intent to recommend the primary region they visited to friends/relatives.



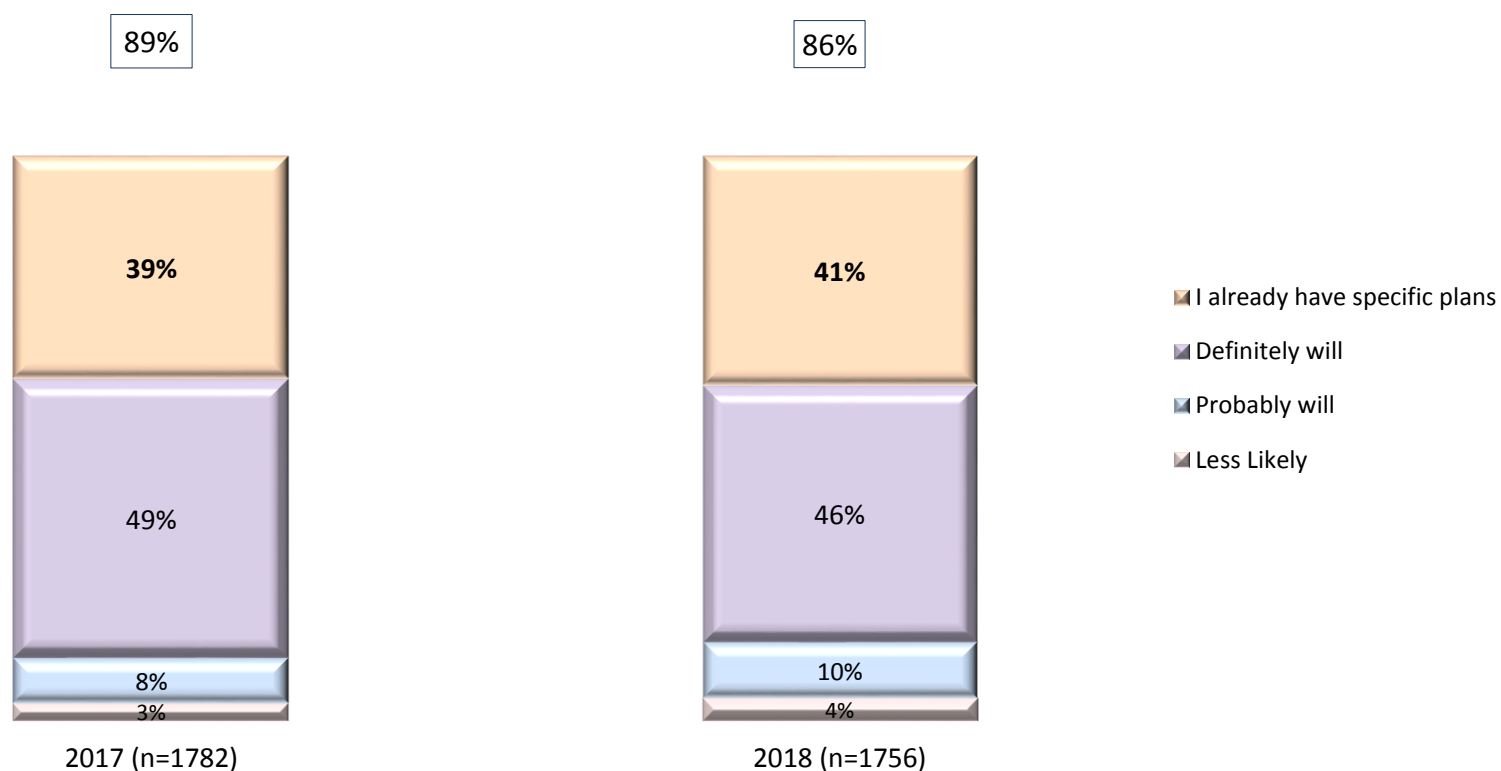
Q22. How likely will you be to recommend the [primary region visited] region to friends or relatives?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

Future intent to visit Maine remains high among day trippers.

LIKELIHOOD TO TRAVEL TO MAINE IN NEXT TWO YEARS



Repeat visitors, Americans, in-state visitors, and those visiting during the winter months were all more likely to express intent to visit Maine again in the next two years.

DAY VISITORS	
Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit	
First-time Visitor (n=110) 71%	Repeat Visitor (n=1646) <87%>
Americans (n=1586) <87%>	Canadians (n=170) 76%
Maine Resident (n=622) <94%>	New England Resident (n=964) 83%

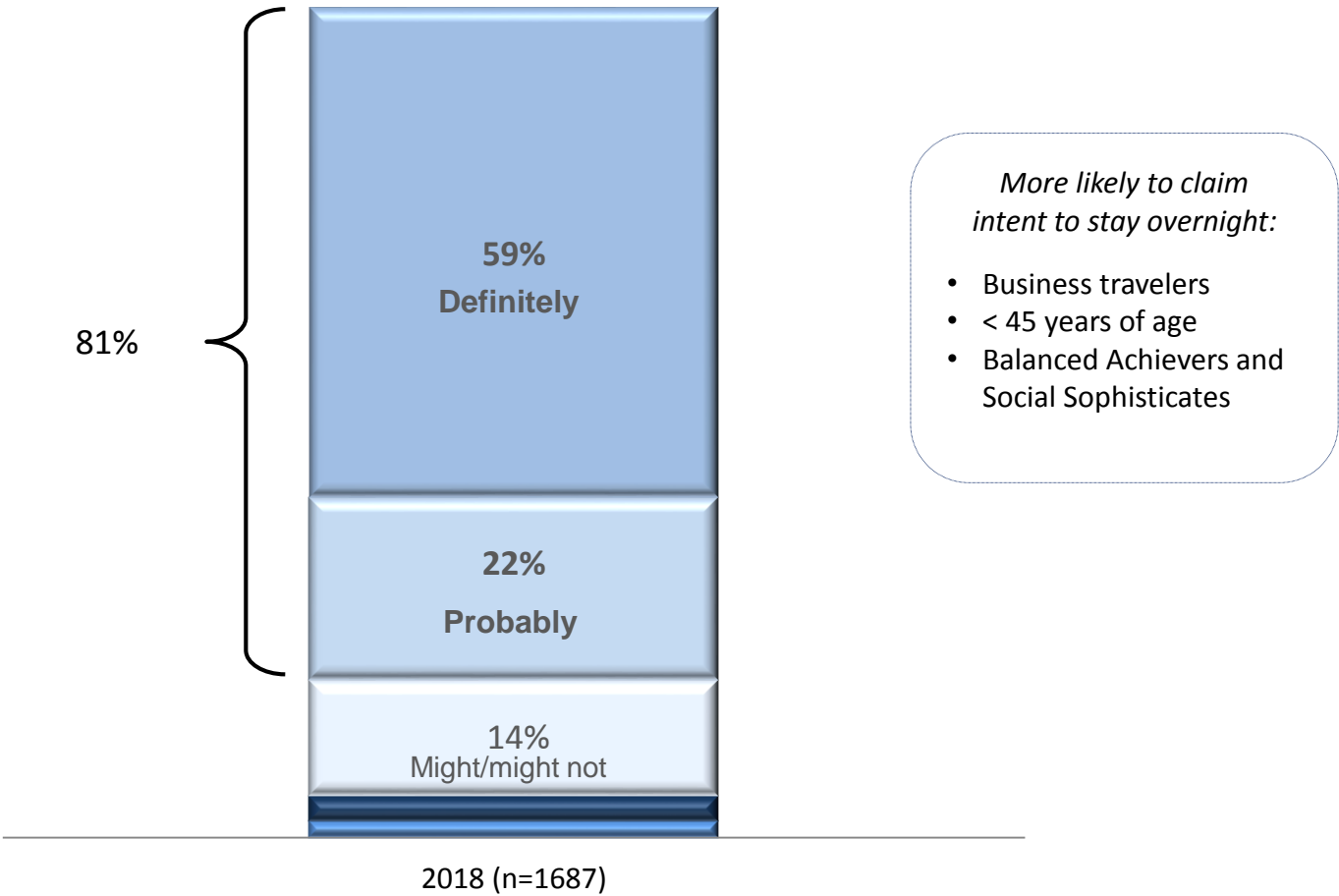
DAY VISITORS		
Percent Who Already Have Plans to Visit Maine in Next Two Years OR Definitely Will Visit		
Winter (n=214) a 91 bc%	Summer (n=1189) b 86%	Fall (n=353) c 85%



CONVERTING DAY TO OVERNIGHT: Among day visitors who are likely to visit Maine again in the next two years, four out of five say they definitely or probably will stay overnight when they visit.

LIKELIHOOD OF STAYING OVERNIGHT IN MAINE IN NEXT TWO YEARS

Base=Day Visitors Likely to Visit Maine in Next Two Years



One-third of day visitors feel that Maine's beaches/lakes/coast are unique to the State and not available at similar destinations.

- While American visitors are more likely than Canadians to find Maine's environment and culinary offerings to be unique qualities of the State, Canadians are more likely to mention the State's many shopping options and its proximity to their home.

UNIQUE MAINE QUALITIES*	2018 TOTAL (n=1756)	Visitor Origin	
		U.S. (n=2492) a	Canada (n=409) b
Beaches/ocean/lakes/coast	32%	35% b	10%
Mountains/nature/wildlife	18%	19% b	8%
Scenery/ocean views/foilage	13%	14% b	10%
Lobster/seafood	9%	9% b	3%
Quiet/peaceful/relaxing	8%	8%	5%
Good food/dining	7%	7% b	2%
Shopping	7%	6%	18% a
Proximity to home	7%	4%	26% a
Friends/relatives live here	6%	6%	5%
Friendly people	6%	6%	6%

* Only responses mentioned by at least 5% of travelers are listed.



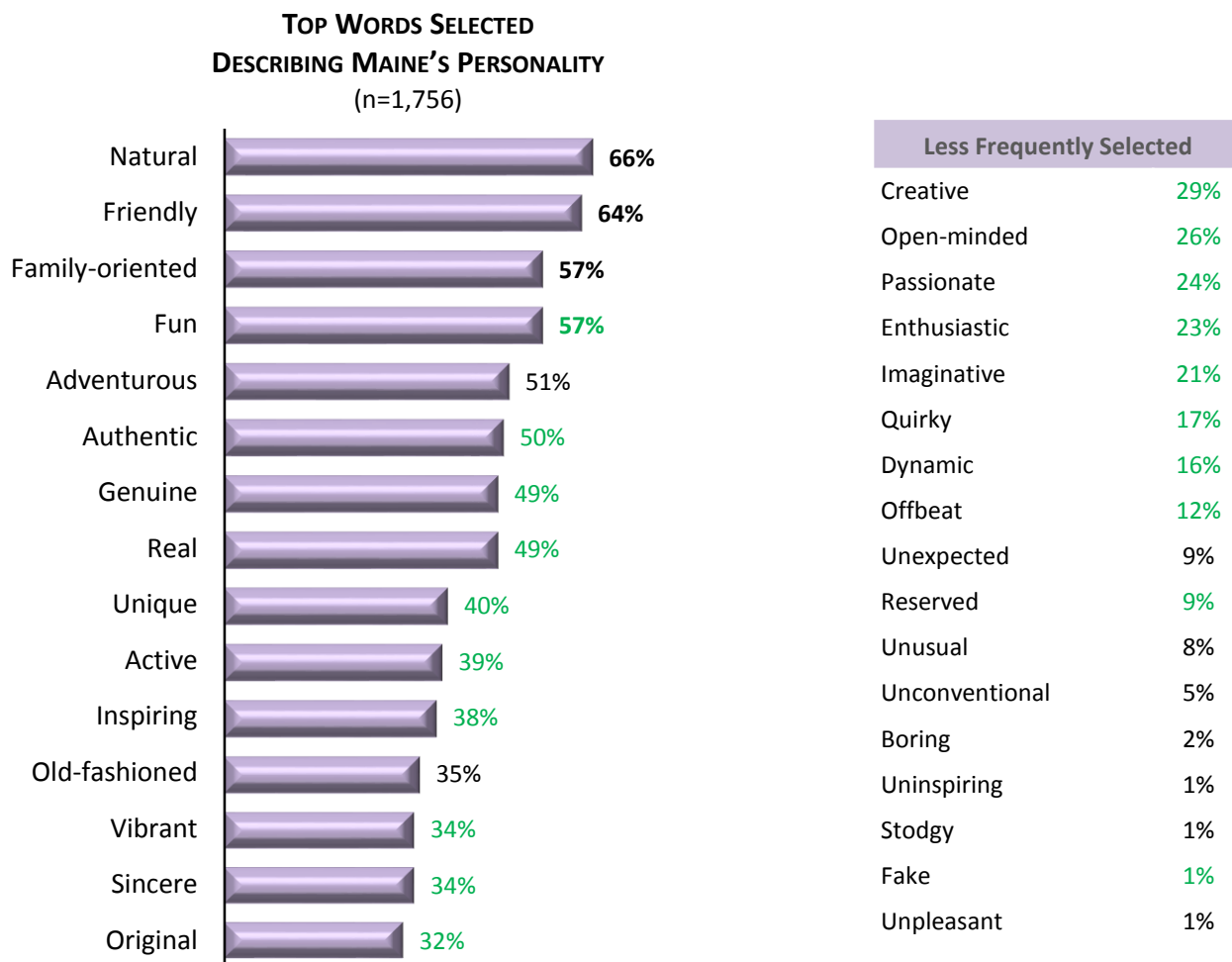
Q13. What does Maine offer as a destination that other similar destinations do not?

<>, and/or a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

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

“Natural” and “Friendly” remain the top words selected by day visitors to describe Maine’s personality. “Family-oriented” and “Fun” fall close behind.

- There appears to be an upward trend from 2017 in assigning positive attributes to the state.



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



Conclusions

Conclusions

Continued Upward Trend in Visitation

The State of Maine experienced year-over-year growth in tourism-related visitation again in 2018, continuing the upward trend observed for several years.

- Though gains posted for overnight visitation were somewhat tempered compared to the large gains achieved in 2017, Maine still succeeded in attracting 1.4% more overnight visitors than it had in the previous year.
- Year-over-year growth was much stronger for day visitation, with Maine welcoming 7.3% more day visitors than in 2017.
- Gains in overnight and day visitation combined for an overall visitation increase of 4.5%.
- Once again, Maine attracted a sizeable proportion of first-time visitors, successfully introducing new travelers to the State, while also bringing in a steady influx of repeat visitors.

Conclusions continued

Visitors Remain Loyal, But Competition Exists

Though Maine visitors exhibit many signs of loyalty towards the State as a travel destination, competition for these visitors – and their tourism dollars – remains strong.

- An extremely high incidence of travelers who will recommend Maine (more than nine in ten) and high levels of future intent to visit Maine again (three in four visitors plan to return in the next two years) provide confirmation of strong Maine brand loyalty.
- Nonetheless, 2018 saw a higher proportion of visitors who considered alternate destinations, and a lower proportion who stayed in Maine exclusively for their vacation without venturing into neighboring states or provinces during their stay.
- Travelers are presented with a continuous stream of marketing messages from multiple destinations, creating the need for Maine to maintain a strong marketing presence if it is to remain top-of-mind when travelers are planning their next vacation.

Conclusions continued

Importance of Promoting Maine as a Family-Friendly Destination

Families traveling with children continue to make up a large and desirable contingent of Maine visitors.

- For the last five years, one-third of travel parties to Maine have included children. Roughly the same proportion of visitors indicated that *family fun/children's activities* was an interest area of theirs when visiting, and half of these travelers indicated that it was the most important consideration in their decision to visit the State – more so than for any other listed interest area.
- Further, when examining the travel habits and preferences of these visitors, we see that they continue to stay in Maine for longer periods of time, visit a wider geographic area within the State, spend more money, and show a higher intent to return to the State.
- Hence, Maine should continue to market itself as a family-friendly destination to maintain its attractiveness to families traveling with children. Further exploration into the motivations, interests, and travel habits of this critical travel cohort is warranted.

Conclusions continued

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

Local Maine residents remain a highly-rated aspect of a Maine vacation.

- When visitors were asked to rate Maine's performance in 15 different attributes, two of the top three attributes focused on Maine's people: *Friendliness of the people*; and *Welcoming locals who make visitors feel comfortable*.
- Visitors' appreciation for Maine's residents supports the ongoing promotion of the individual friendly "faces" of Maine with which visitors will be greeted if they travel to the State.
- This also highlights the importance of educating Maine's residents regarding the importance of the tourism economy and the roles they all play in it.

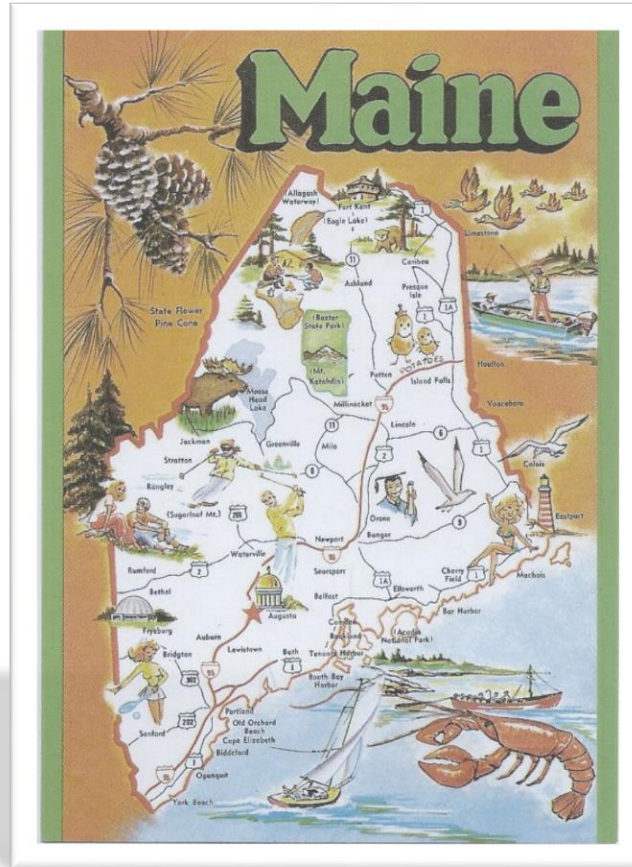
Conclusions continued

Opportunity to Continue Travel Marketing Once Visitors Arrive Maine

Visitors' contributions to the State can be maximized by providing a stream of travel information that is easily accessed in-market.

- Eight in ten overnight visitors and seven in ten day visitors reported that they continued to conduct research on things to do and places to visit in Maine after they had arrived in the State. Most were using a mobile device (about two-thirds).
- Exploration into the development of a mobile travel app for Maine would be beneficial, as this would give visitors an easy way to find places and activities of interest, on-the-fly.
- More than one-fourth of overnight visitors stated that they had visited nearby states or provinces while in Maine, illustrating their desire to explore beyond the locale they first selected as a destination.

Research Objectives and Methodology



Research Objectives

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

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

DESCRIPTION OF SURVEY INSTRUMENTS

National Omnibus

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

Overnight Visitor

- 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

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

Methodology

- This report presents results from 2018, describing travel that occurred between December 1, 2017 and November 30, 2018.
- Data collection occurred monthly between January 2 and December 14, 2018. The number of completed surveys collected for each research component are as follows:

Research Component	Completed Surveys
Overnight Visitor Survey	2,901
Day Visitor Survey	1,756
National Omnibus Survey	20,579

- Statistical significance of differences between subgroups was calculated at the 95% confidence level and is noted throughout by <> or a/b/c/etc.
- A statistically significant **increase** from the previous year is indicated throughout by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.

Demographic Profile



Visitor Demographics

	Overnight Visitors		Day Visitors	
	2017 (n=2922)	2018 (n=2901)	2017 (n=1782)	2018 (n=1782)
Age:				
< 35	39%	46%	33%	37%
35 – 44	23%	23%	19%	18%
45 – 54	16%	14%	19%	16%
55 +	22%	17%	29%	28%
Mean Age (Years)	40.7	39.0	44.0	43.0
Income:				
< \$50,000	23%	27%	32%	38%
\$50,000 - \$99,999	43%	43%	41%	39%
\$100,000 +	34%	30%	27%	22%
Estimated Mean Income	\$92,650	\$86,350	\$80,750	\$74,130
Female	70%	66%	76%	78%
College Degree or Higher	65%	65%	54%	58%
Married	50%	47%	48%	49%
Employed Full-time	62%	62%	52%	49%

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

Visitor Segments

- Overnight visitors to Maine in 2018 were most likely to be categorized as Balanced Achievers or Genuine Originals. The proportion of overnight visitors categorized as Balanced Achievers increased from 2017 to 2018, while the proportion categorized as Genuine Originals decreased slightly.
- Day visitors are most likely to fall into these two visitor segments also, with a higher proportion falling in the Balanced Achievers category this year, as compared to 2017.

	Overnight Visitors		Day Visitors	
	2017 (n=2922)	2018 (n=2901)	2017 (n=1782)	2018 (n=1756)
Priority Segments:				
Balanced Achievers	34%	41%	27%	32%
Genuine Originals	32%	30%	31%	34%
Social Sophisticates	9%	7%	7%	7%

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



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