Maine Office of Tourism
Visitor Tracking Research
Winter/Spring 2018 Seasonal Topline

Prepared by

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August 2018

Research Objectives and Methodology

Research Objectives

Three distinct online surveys are used to accomplish 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 Survey

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

Overnight Visitor Survey

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

Day Visitor Survey

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

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Methodology

- This report provides results from the Winter/Spring 2018 travel season, describing travel that occurred between December 1, 2017 and April 30, 2018.

- Winter data collection occurred monthly between January 2 and May 16, 2018. The number of completed surveys collected for each research component is as follows:

Research Component	Completed Winter Season Surveys
Overnight Visitor Survey	869
Day Visitor Survey	464
National Omnibus Survey	15,230

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

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Executive Summary

2018 Winter Visitation Estimates

The Maine tourism industry served 6.5 million visitors during the Winter of 2018

3.6 million stayed overnight

2.9 million visited for the day

2018 Winter Visitor Profile

Average Age

Overnight Visitor – 38 yrs

Day Visitor – 44 yrs

First-Time Visit

28% of overnight visitors

5% of day visitors

Overnight Visitor Origin

47% Mid-Atlantic

43% New England

10% Canada

Day Visitor Origin

91% U.S. (primarily MA & ME)

9% Canada

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2018 Winter Trip Profile

Among all Visitors: Overnight and Day

Top Visitor Interest Areas

Food/Beverage/Culinary

Shopping

Touring/Sightseeing

Active Outdoor/Water Activities

Top Regional Destinations

Maine Beaches Region

Maine Highlands

Downeast & Acadia

Portland/Casco Bay

Maine Lakes & Mountains

Among Overnight Visitors

Paid Accommodations

71% of overnight visitors stayed in paid accommodations

Average Length of Stay

3.7 nights

2018 Winter Visitor Satisfaction

Aspects of Trip Most Exceeding Visitor Expectations

Overall experience

Friendliness of the people

Overall quality of customer service

Quality of dining

Welcoming locals who make visitors feel comfortable

Intend to Recommend Maine

94% of overnight and day visitors

Intend to Visit in Next Two Years

78% of overnight visitors

91% of day visitors

Day Visitors Extending Stay

64% of day visitors likely to visit Maine in the next two years say they will "definitely stay overnight" on their next visit.

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2018 Winter Visitor Target Segments*

<u>Overnight Visitors</u>

44% Balanced Achievers

28% Genuine Originals

6% Social Sophisticates

<u>Day Visitors</u>

34% Genuine Originals

32% Balanced Achievers

5% Social Sophisticates

**Sum of target segment proportions will not total 100%.
The difference is comprised of visitors from non-target segments.*

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2018 Winter Season Travel Context

The relative cost to travel (Travel Price Index) continues to rise.

- The Winter season showed a year-over-year increase in both the average TPI and CPI.

Consumer Price Index and Travel Price Index

Winter 2018 Avg TPI = 278.9
Winter 2017 Avg TPI = 275.1

Winter 2018 Avg CPI = 248.7
Winter 2017 Avg CPI = 243.2

TPI 2018
CPI 2018
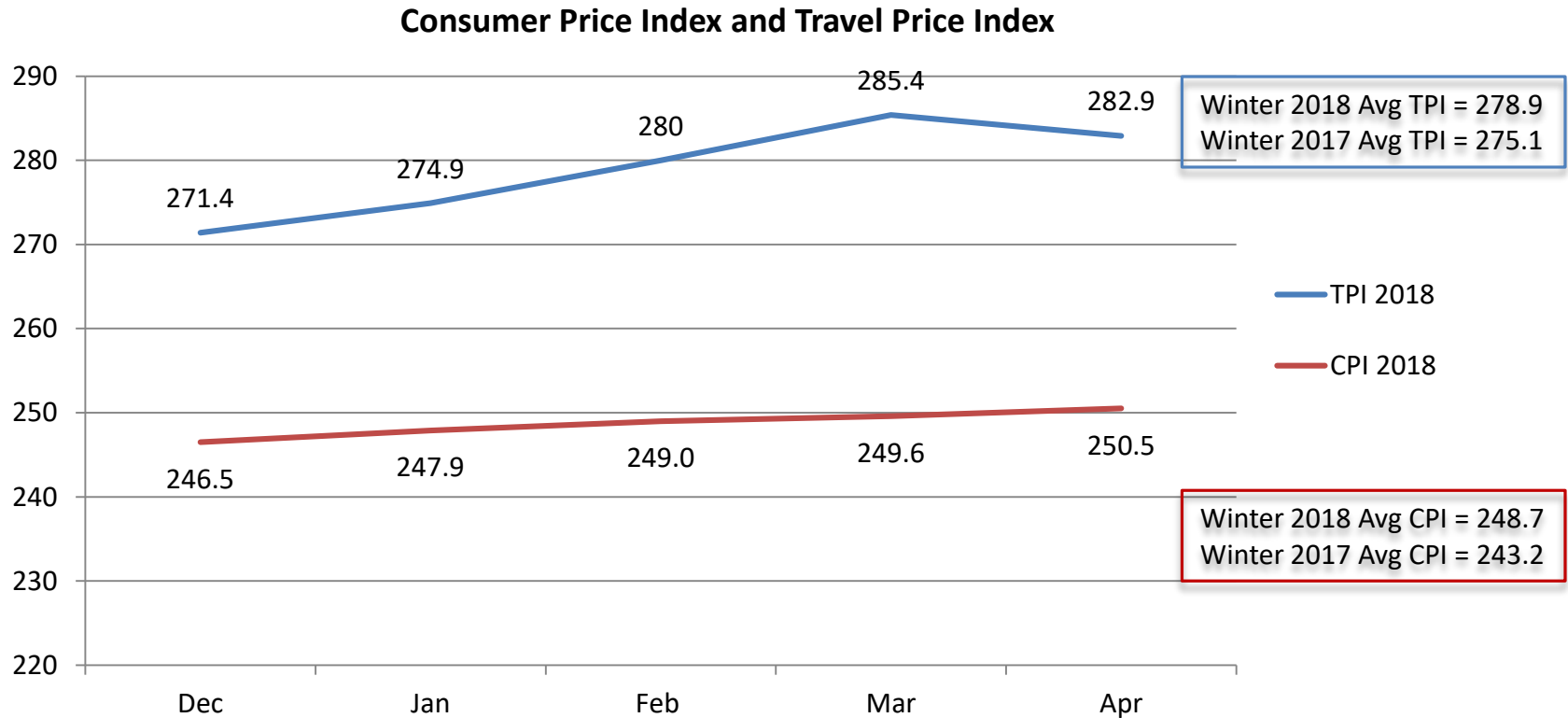
Data Sources: CPI figures are from the US Bureau of Labor Statistics. TPI figures are from the US Travel Association.

Temperatures in Maine during the Winter 2018 season varied from the 20-year average – some months above and some months below.

- This winter season brought lower than average temperatures in December and April, and higher than average temperatures in February and March.

Temperature – Maine Winter 2018

2017-18 Avg Temp   **20-year Average Temp**

Data source: National Oceanic and Atmospheric Administration, U.S. Department of Commerce

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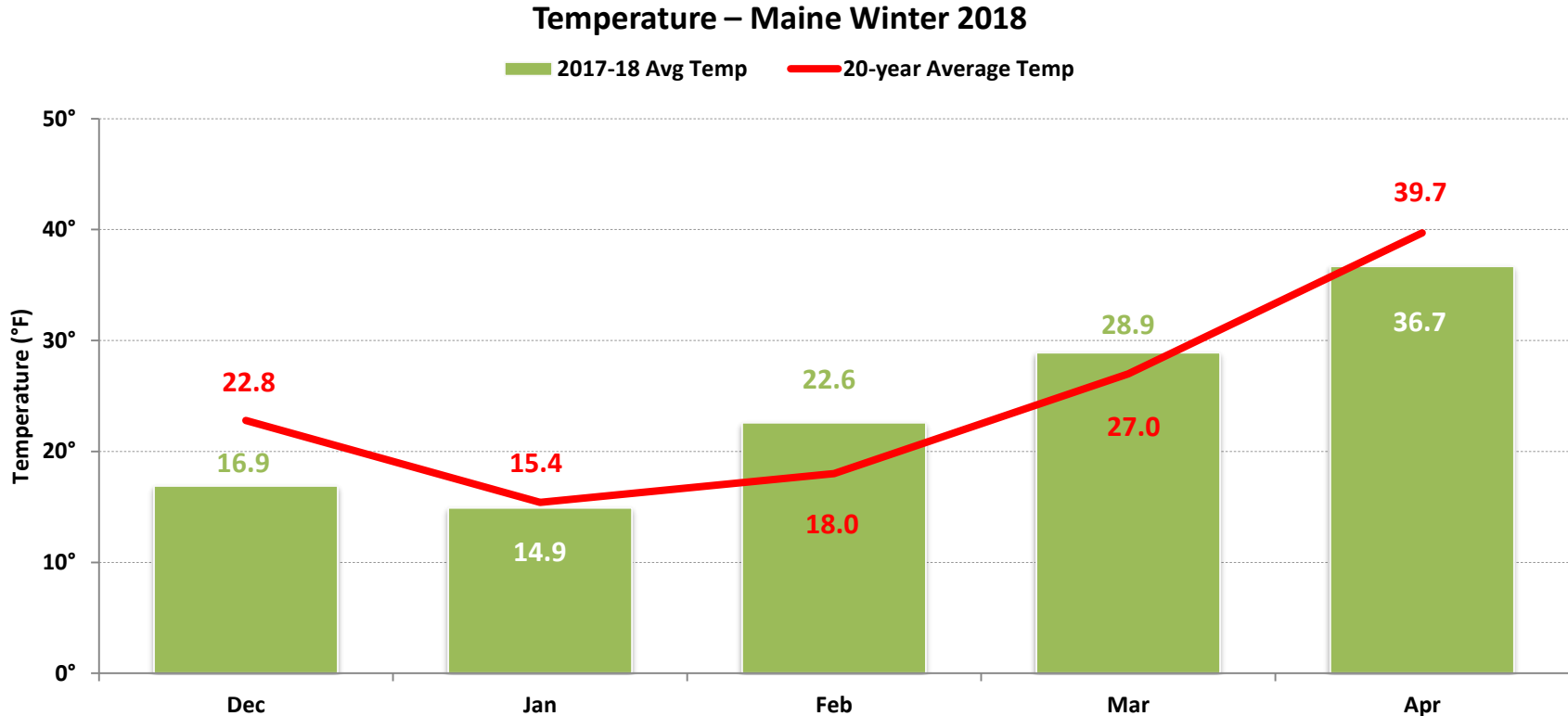
Precipitation in Maine was above the 20-year average in January and April, and slightly below average in December and March.
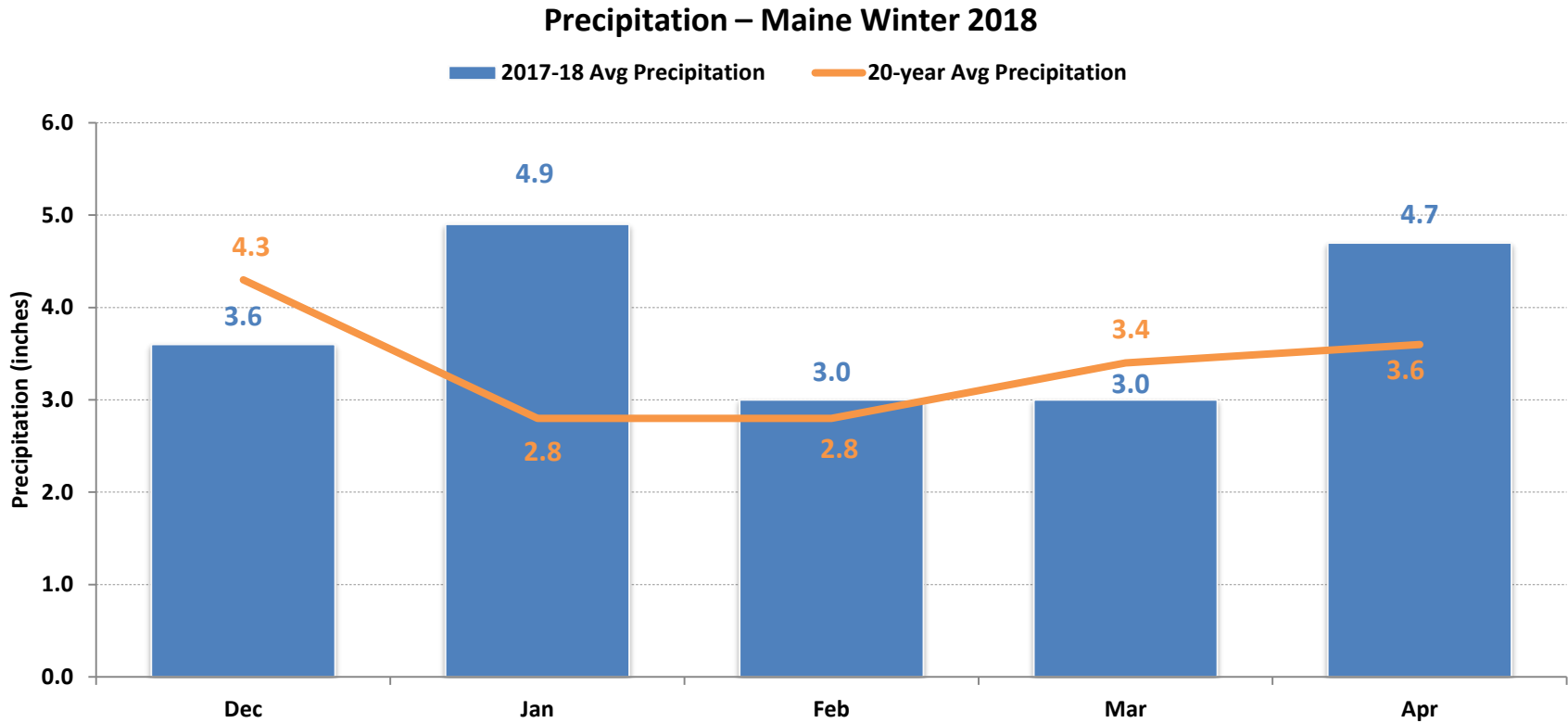
Precipitation – Maine Winter 2018

■ 2017-18 Avg Precipitation   **— 20-year Avg Precipitation**

Month	2017-18 Avg Precipitation	20-year Avg Precipitation
Dec	3.6	4.3
Jan	4.9	2.8
Feb	3.0	2.8
Mar	3.0	3.4
Apr	4.7	3.6

Y-axis: Precipitation (inches)

Data source: National Oceanic and Atmospheric Administration, U.S. Department of Commerce

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At the beginning of the winter season, gas was more expensive in Maine than in the U.S. overall, but then dropped below the national average in March and April.

- Gas prices in Maine and nationwide rose steadily during the 2018 Winter season (with the exception of a brief decline in February), ending the season significantly higher than they'd started.

9 Month Average Retail Price Chart
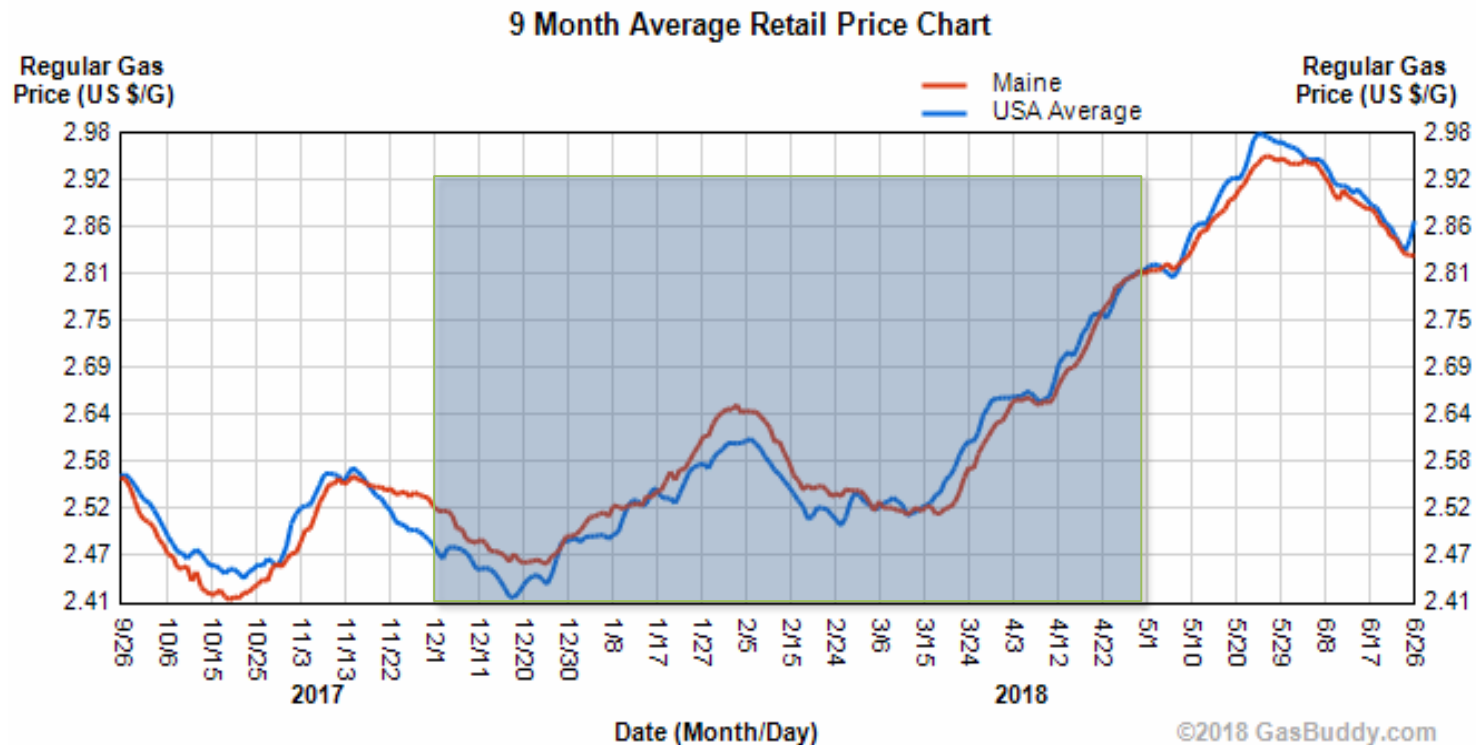
Gas prices in Maine and nationwide were higher overall during this winter season (2018) than they had been last winter (2017).

24 Month Average Retail Price Chart
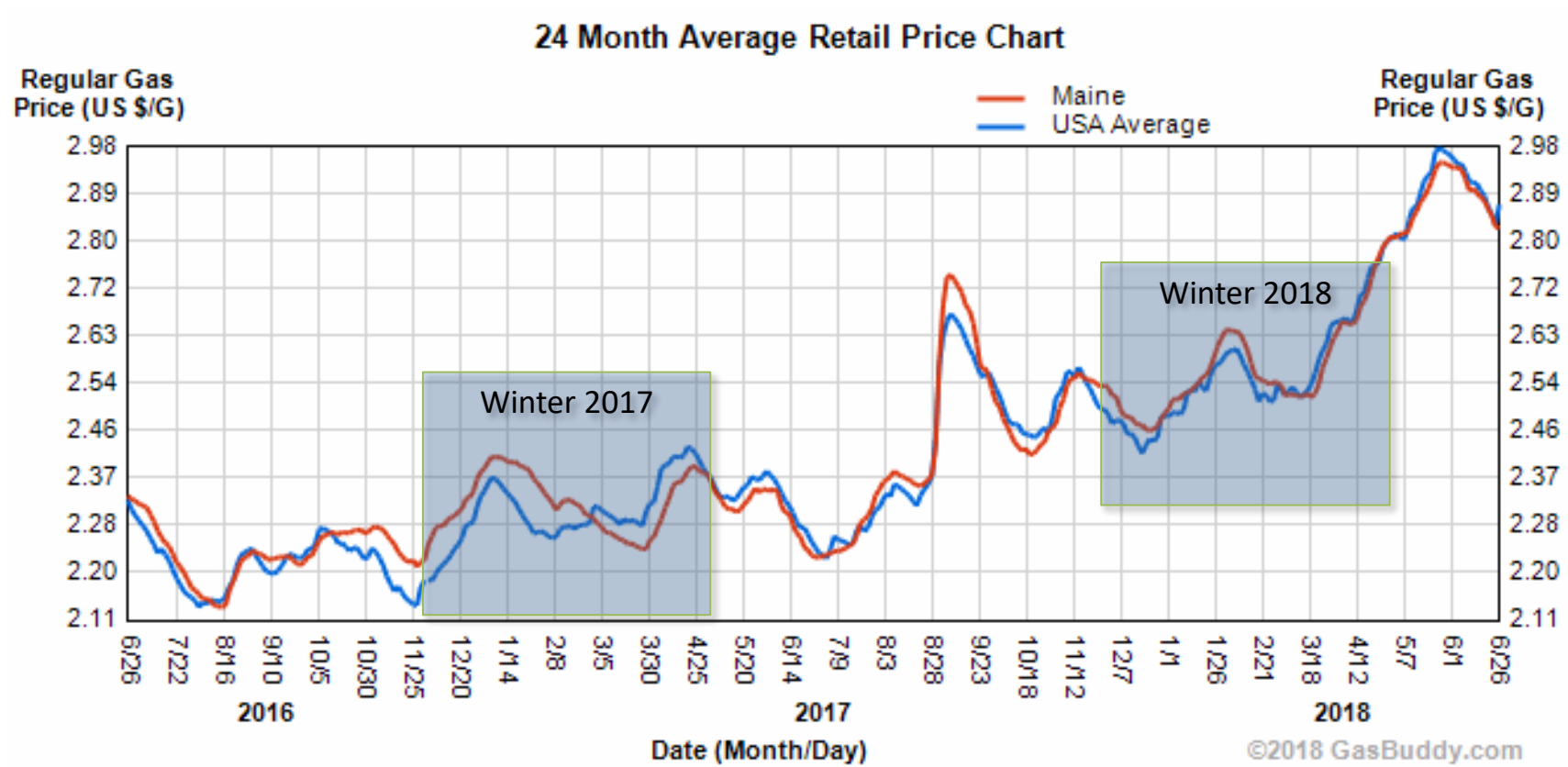
The Canadian exchange rate remained low this winter season.

- The exchange rate showed a modest increase over the 2016 and 2017 seasons.

Canadian Exchange Rate

Winter 2015 Average 0.8191

Winter 2016 Average 0.7390

Winter 2017 Average 0.7521

Winter 2018 Average 0.7885
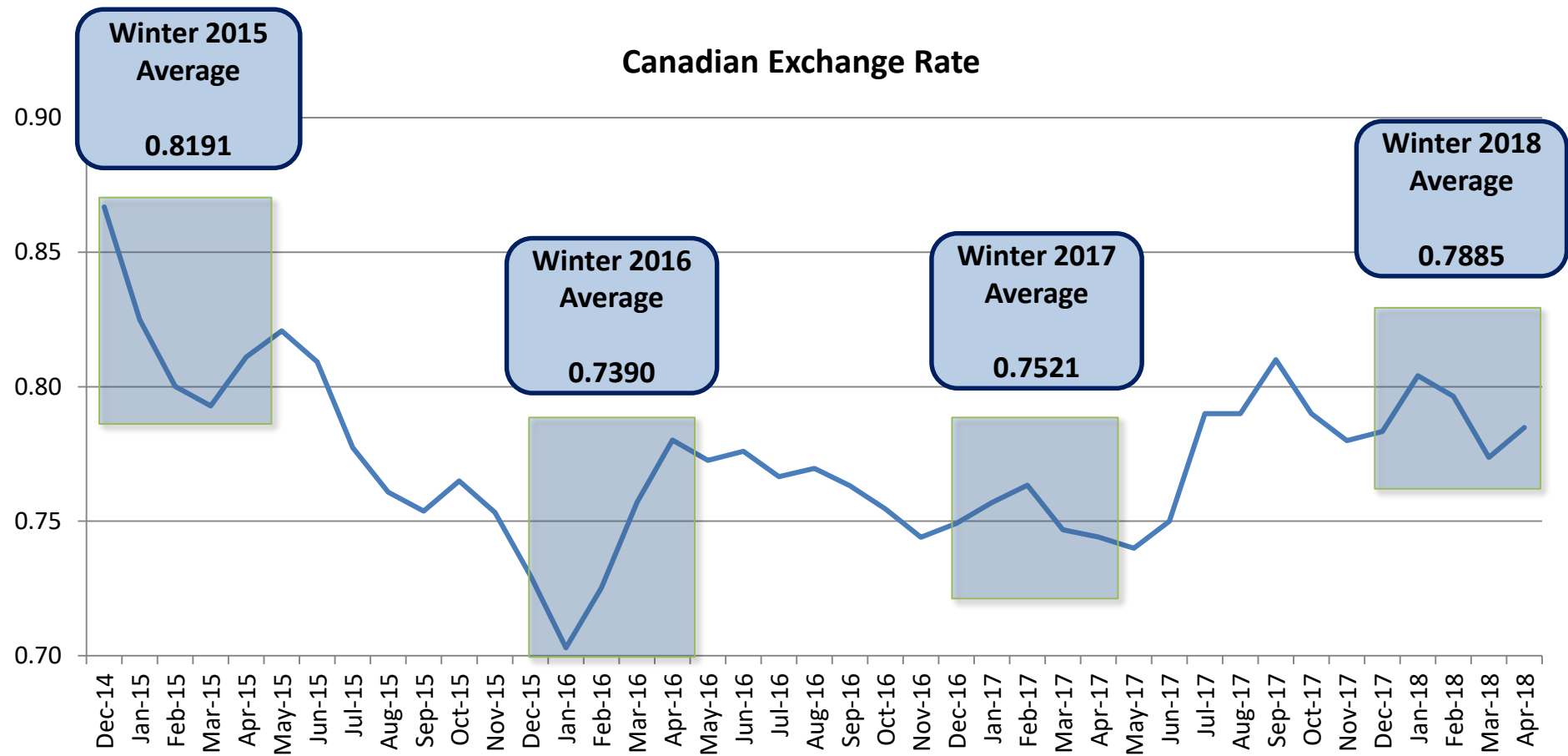
For the winter season, <u>nationwide</u> business travel declined for the second year in a row.
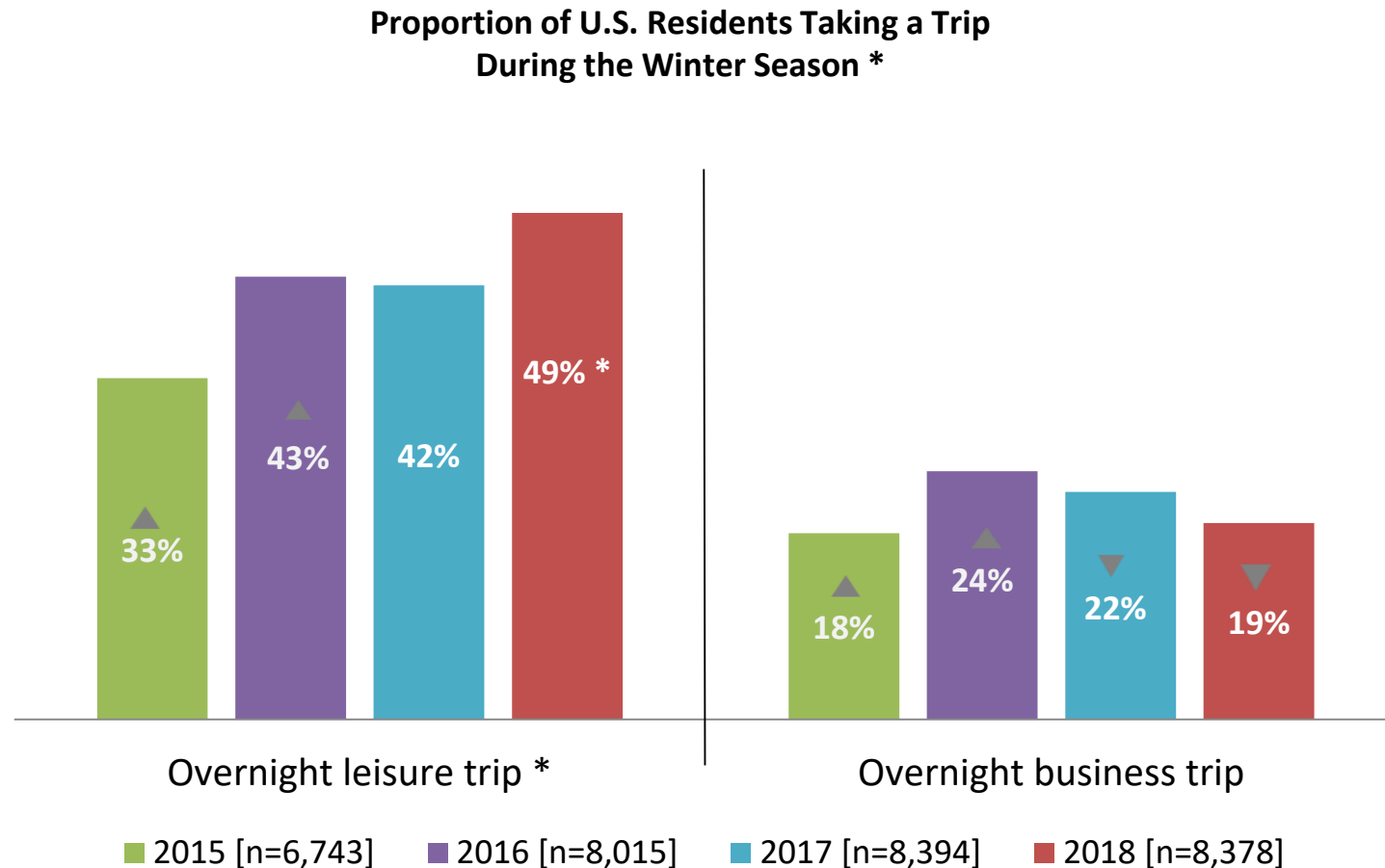
**Proportion of U.S. Residents Taking a Trip
During the Winter Season ***

Overnight leisure trip *

- Overnight leisure trip: 2015 = 33%, 2016 = 43%, 2017 = 42%, 2018 = 49% *
- Overnight business trip: 2015 = 18%, 2016 = 24%, 2017 = 22%, 2018 = 19%

Overnight business trip

■ 2015 [n=6,743] ■ 2016 [n=8,015] ■ 2017 [n=8,394] ■ 2018 [n=8,378]

* In 2018, data collection was modified to only measure <u>leisure</u> travel and <u>business</u> travel, eliminating the separate category of <u>VFR</u> travel. Therefore, leisure travel proportions are not directly comparable to prior years' data, as they now include VFR travel.

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

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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Maine's share of total overnight trips taken nationwide was comparable to 2017.

Overnight Leisure Trips *

	2016 [n=7,264 trips]
	2017 [n=7,599 trips]
	2018 [n=8,434 trips]

Massachusetts: 1.7%, 0.9%, 1.4%
Connecticut: 1.5%, 1.7%, 1.5%
Maine: 1.4%, 0.6%, 0.5%
New Hampshire: 0.4%, 0.3%, 0.4%
Rhode Island: 0.3%, 0.2%, 0.2%
Vermont: 0.3%, 0.1%, 0.2%

Overnight Business Trips

	2016 [n=4,118 trips]
	2017 [n=4,062 trips]
	2018 [n=3,362 trips]

Massachusetts: 1.4%, 1.4%, 1.3%
Connecticut: 2.6%, 2.0%, 1.7%
Maine: 1.0%, 0.3%, 0.5%
New Hampshire: 0.2%, 0.2%, 0.4%
Rhode Island: 0.1%, 0.2%, 0.2%
Vermont: 0.2%, 0.1%, 0.1%

* In 2018, data collection was modified to only measure <u>leisure</u> travel and <u>business</u> travel, eliminating the separate category of <u>VFR</u> travel. Therefore, leisure travel proportions are not directly comparable to prior years' data, as they now include VFR travel.

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

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2018 Winter Season Highlights

Overnight visitation increased this winter season (2018), as compared to last winter (2017), while day visitation dropped slightly.

- Overall winter visitation (overnight and day) showed a modest increase (1.1%) over the prior winter season.

Visitation Estimates*	Winter 2017	Winter 2018	% Chg
Total Estimated Visitation	**6.4 million**	**6.5 million**	**+ 1.1%**
Overnight Visitors	*3.5 million*	*3.6 million*	*+ 3.6%*
Day Visitors	*2.9 million*	*2.9 million*	*- 1.9%*

*For the purposes of visitation estimates, <u>only visitors on tourism-related trips</u> 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.*

Note: Visitation estimates provided here are preliminary and reflect visitation from December 2017 through April 2018. Adjustments will be made to these estimates at the end of the year for the Annual Report, to account for seasonal fluctuations.

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Maine winter visitors are in their late 30s to mid-40s, on average, with day visitors trending older than overnight visitors.

Mean Age = 38.3

Mean Age = 44.2

Repeat visitors, leisure visitors, and those traveling without children trend older on average.

Legend:
- <35
- 35-44
- 45-54
- 55+

Overnight Visitors:
- ▲ 46%
- 25%
- 14%
- ▼ 15%

Day Visitors:
- 32%
- 20%
- 18%
- 30%

Overnight Visitors [n=869]

Day Visitors [n=464]

Overnight/Day Q1. How old are you?

▲▼ notes significant difference from the prior year at the 95% confidence level

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The proportion of overnight winter season visitors from Canada decreased from 2017, while there was a sharp increase in those traveling from the Mid-Atlantic states.

Legend:
- 2016 [n=874]
- 2017 [n=878]
- 2018 [n=869]

U.S. - New England: 45%, 54%, 43%
U.S. - Mid Atlantic: 40%, 31%, 47%
Canada: 15%, 16%, 10%

MA: 19%, 22%, 19%
ME: 10%, 13%, 9%
CT: 7%, 8%, 6%
NH: 5%, 6%, 6%
RI: 2%, 3%, 2%
VT: 1%, 1%, 2%

NY: 17%, 16%, 22%
NJ: 9%, 7%, 9%
PA: 9%, 5%, 10%
MD: 5%, 3%, 4%

Ontario: 7%, 9%, 6%
Quebec: 3%, 3%, 3%
New Brunswick: 4%, 2%, <1%

Q2. State/Province of Residence

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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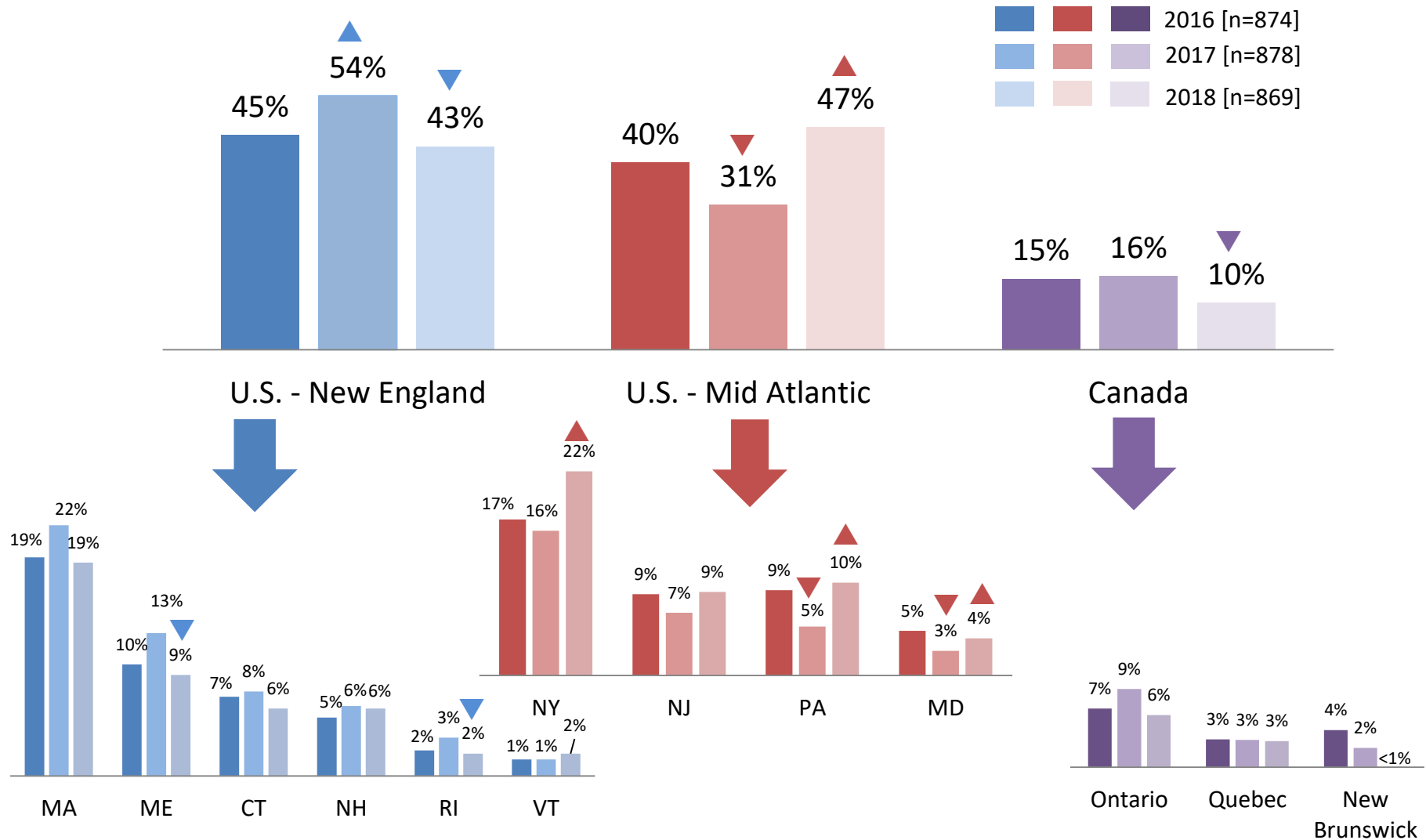
The largest proportions of winter season day visitors are in-state residents or those traveling from Massachusetts.

Legend:
- 2015 [n=432]
- 2016 [n=457]
- 2017 [n=473]
- 2018 [n=464]

Massachusetts: 37%, 37%, 40%, 35%
Maine: 33%, 30%, 34%, 35%
New Hampshire: 16%, 19%, 15%, 15%
Vermont: 2%, 3%, 1%, 4% ▲
Rhode Island: 1%, 3% ▲, 2%, 1%
New Brunswick: 6%, 3%, 5%, 6%
Quebec: 4%, 4%, 4%, 2%

Q2. State/Province of Residence

▲▼   *notes significant difference from the prior year at the 95% confidence level*
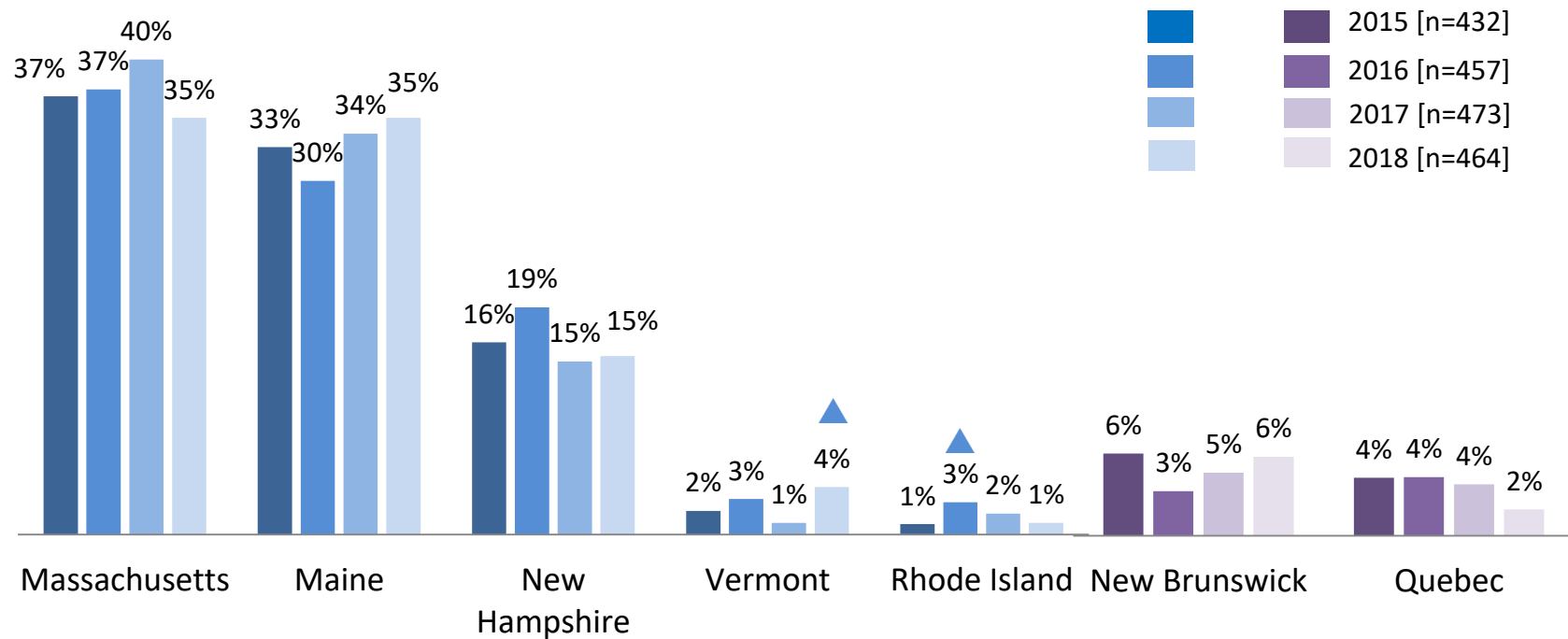
One-fourth of overnight visitors during the 2018 winter season were visiting Maine for the first time.

**First-Time Overnight Visitors
(as compared to Repeat Visitors)**:
- More likely to be *from the Mid-Atlantic region*
- *Business* travelers
- Younger (*less than 35 yrs old*)
- More likely to be categorized as *Balanced Achievers*

Chart: First Time Visitors

- 2016 Overnight Visitors [n=874]: 19%
- 2017 Overnight Visitors [n=878]: 27% ▲
- 2018 Overnight Visitors [n=869]: 28%
- 2016 Day Visitors [n=457]: 7%
- 2017 Day Visitors [n=473]: 6%
- 2018 Day Visitors [n=464]: 5%

First Time Visitors
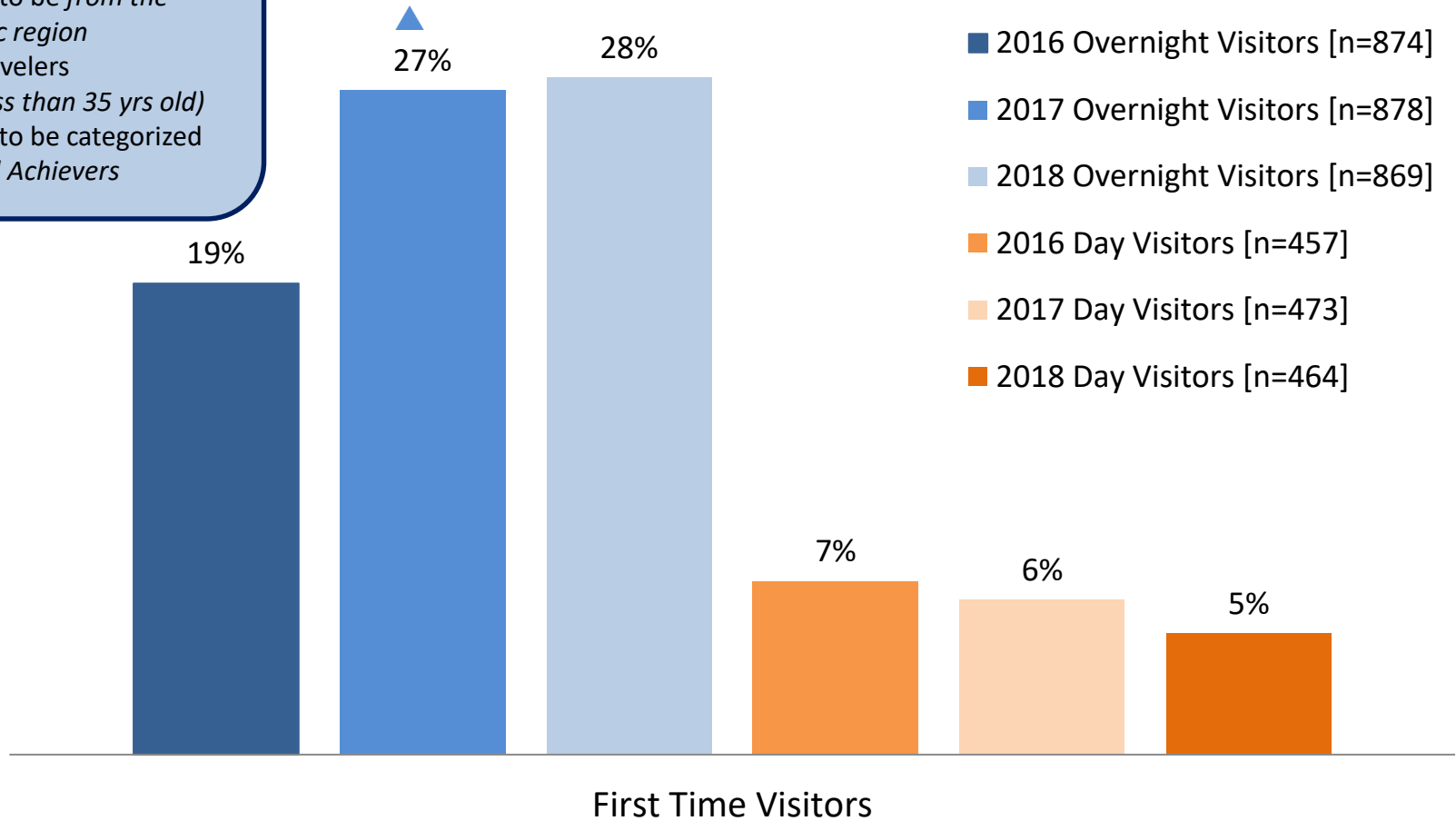
Overnight Q11, Day Q10. Was this your first visit to Maine?

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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All eight regions attract winter season visitors, with the largest shares traveling to the Maine Beaches and the Maine Highlands regions.

Legend:
- 2016 [n=874]
- 2017 [n=878]
- 2018 [n=869]

Region	2016	2017	2018
Maine Beaches	21%	17%	20%
The Maine Highlands	17%	17%	19%
Downeast & Acadia	18%	16%	14%
Maine Lakes & Mountains	13%	12%	13%
Portland/ Casco Bay	12%	12%	11%
Mid-Coast	10%	10%	10%
Kennebec Valley	7%	8%	6%
Aroostook County	3%	6% ▲	4%

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

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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Among Maine's overnight visitors, certain sub-groups have a stronger propensity to visit specific tourism regions.

- Canadians
- Business travelers

First-time visitors

First-time visitors

- U.S. residents
- Genuine Originals

- Repeat visitors
- U.S. residents
- Leisure travelers
- Social Sophisticates

Repeat visitors

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

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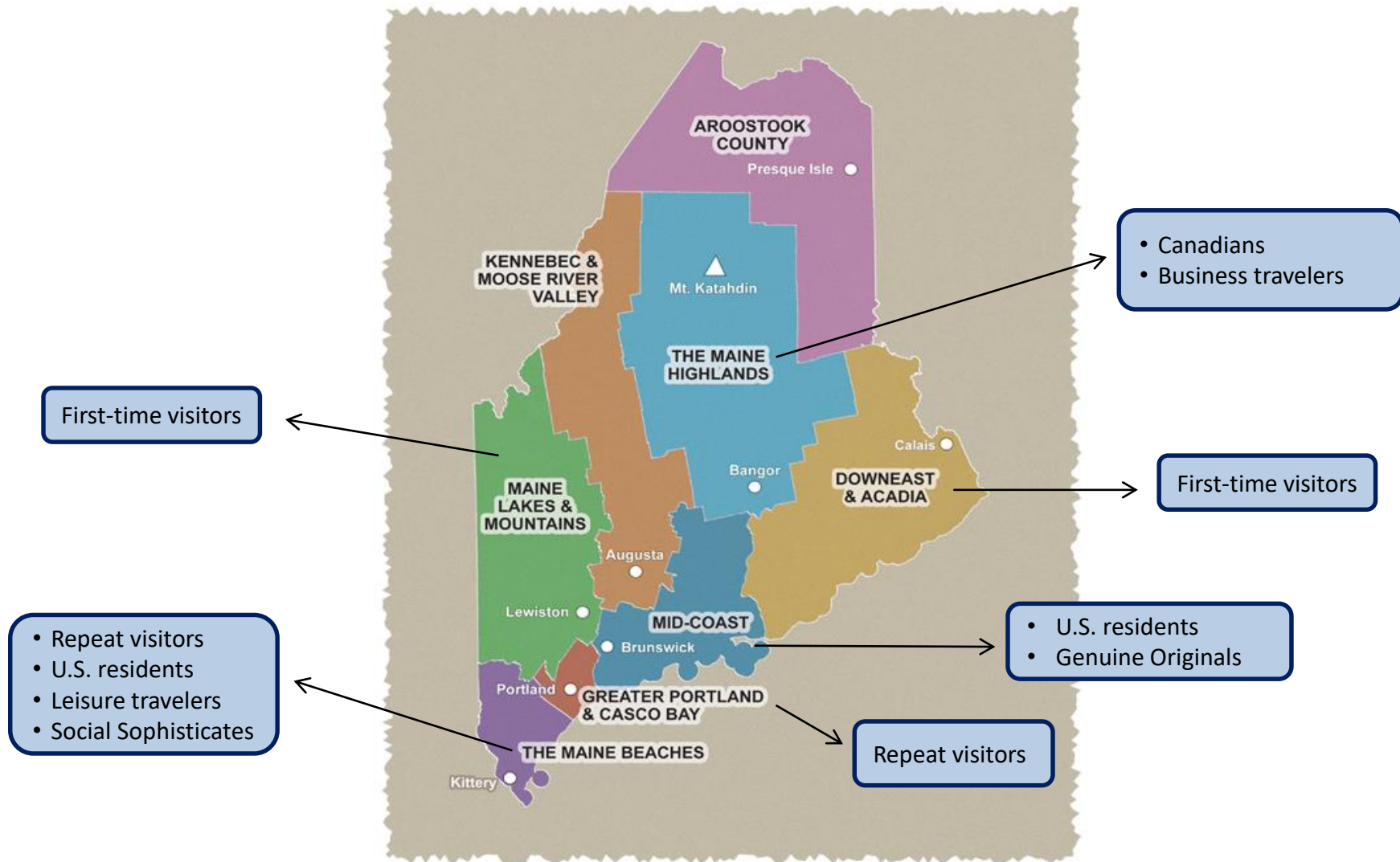
The Maine Beaches region continues to be the most popular regional destination for <u>day</u> visitors during the winter season.
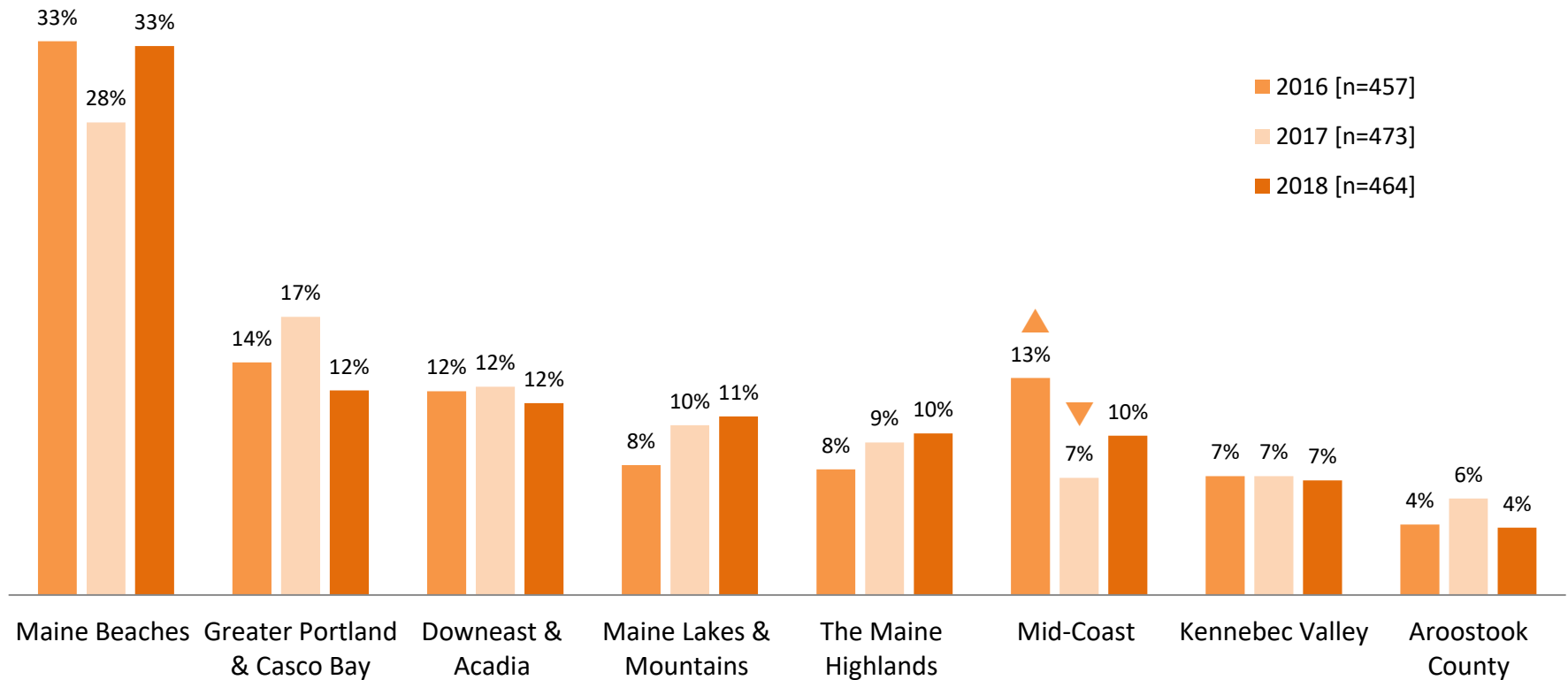
Legend:
- 2016 [n=457]
- 2017 [n=473]
- 2018 [n=464]

Region	2016	2017	2018
Maine Beaches	33%	28%	33%
Greater Portland & Casco Bay	14%	17%	12%
Downeast & Acadia	12%	12%	12%
Maine Lakes & Mountains	8%	10%	11%
The Maine Highlands	8%	9%	10%
Mid-Coast	13% ▲	7% ▼	10%
Kennebec Valley	7%	7%	7%
Aroostook County	4%	6%	4%

Day Q21. What region in Maine was your primary destination?

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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Among Maine's day visitors, certain sub-groups have a stronger propensity to visit specific tourism regions.

- Maine residents
- Households earning <$75k

Canadians

- Maine residents
- U.S. residents
- Leisure travelers

- Leisure travelers
- New England residents
- U.S. residents
- Repeat visitors

U.S. residents
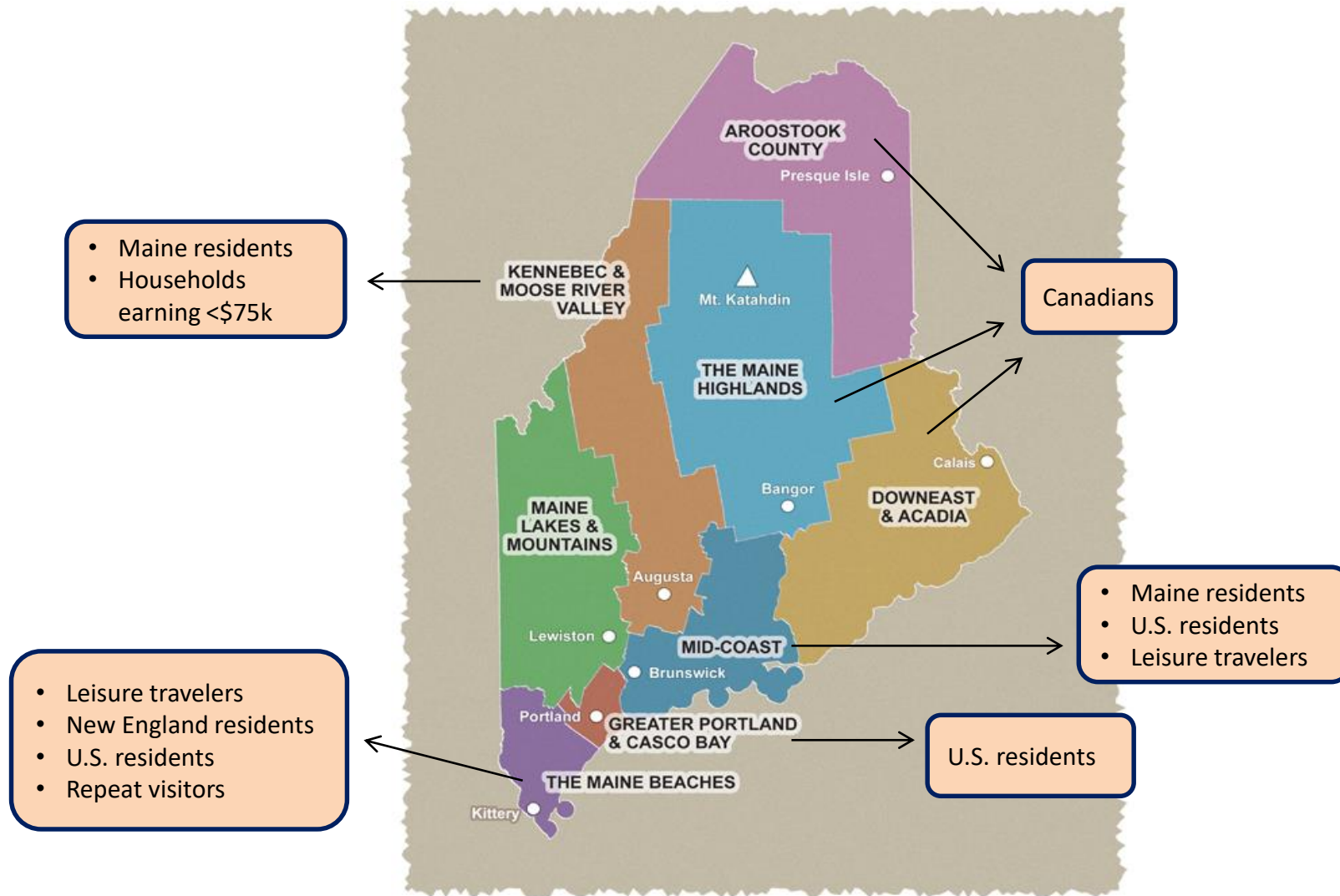
Day Q21. What region in Maine was your primary destination?

A majority of winter season <u>overnight visitors</u> are interested in exploring Maine's various *food/beverage/culinary* options or *shopping*.

Travel Interest Areas of Maine Overnight Winter Visitors

NET OUTDOOR: Active Outdoor Activities & Water Activities		
2016	2017	2018
43%	43%	47%

■ Overnight Visitors 2016 [n=874]
■ Overnight Visitors 2017 [n=878]
■ Overnight Visitors 2018 [n=869]

Food, beverage, culinary: 61% 61% 58%
Shopping: 58% 54% 55%
Touring or sightseeing: 49% 47% 48%
Active outdoor activities (not water): 34% 33% 38%
History or culture: 35% 30% 33%
Family fun or children's activities: 29% 27% 29%
Water activities: 19% 17% 20%
Other: 4% 5% 5%

Overnight Q35: Which of the following interest areas did you want to pursue during this trip to Maine?
▲▼ *notes significant difference from the prior year at the 95% confidence level*

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The sub-groups of overnight visitors that are <u>more likely</u> to express interest in specific areas are presented in the table below.

Interest Area	Sub-Groups of Overnight Visitors More Likely to be Interested
Food, beverage, culinary	Repeat visitors Social Sophisticates
Shopping	New England residents (outside Maine) Traveling with children
Touring or sightseeing	Non-residents Paid accommodations
Active outdoor activities (non-water)	U.S. residents Leisure travelers
History or culture	Mid-Atlantic and Canadian visitors First-time visitors Paid accommodations
Family fun or children's activities	Traveling with children Leisure travelers Unpaid accommodations U.S. residents
Water activities	Traveling with children First-time visitors U.S. residents

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Winter __day visitors__ were also most interested in *shopping* and *food/beverage/culinary* activities.

NET OUTDOOR: Active Outdoor Activities & Water Activities		
2016	2017	2018
40%	40%	38%

Travel Interest Areas of Maine Winter Day Visitors

■ Day Visitors 2016 [n=457]
■ Day Visitors 2017 [n=473]
■ Day Visitors 2018 [n=464]

	Shopping	Food, beverage, culinary	Touring or sightseeing	Active outdoor activities (not water)	Family fun or children's activities	Water activities	History or culture	Other
2016	64%	61%	44%	33%	31%	20%	24%	7%
2017	64%	60%	42%	33%	22% ▼	17%	16% ▼	7%
2018	62%	60%	35%	30%	26%	18%	14%	7%

Day Q18: Which of the following interest areas did you want to pursue during this trip to Maine?
▲▼ *notes significant difference from the prior year at the 95% confidence level*

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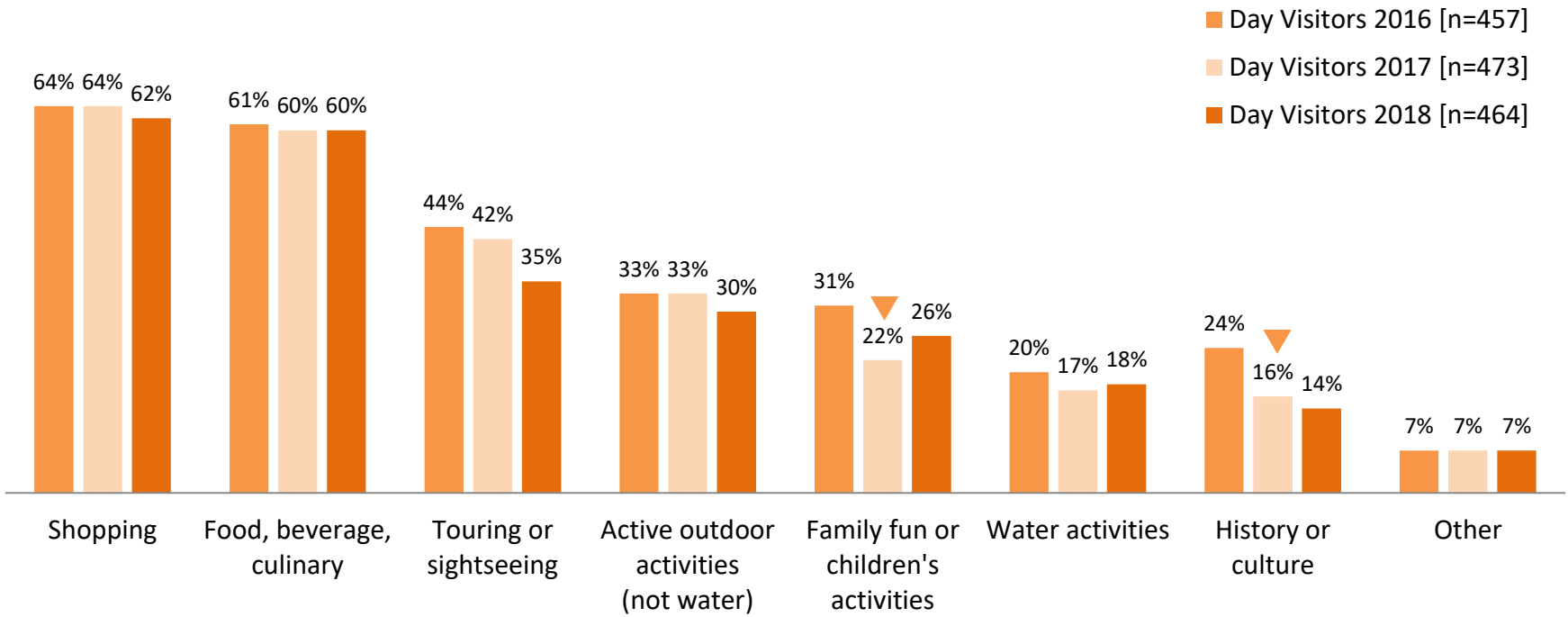# The sub-groups of day visitors that are <u>more likely</u> to express interest in specific areas are presented in the table below.

Interest Area	Sub-Groups of Day Visitors More Likely to be Interested
Food, beverage, culinary	New England residents Social Sophisticates
Shopping	Canadians
Touring or sightseeing	New England residents
Active outdoor activities (non-water)	U.S. residents First-time visitors
History or culture	*No sub-group differences noted*
Family fun or children's activities	U.S. residents Traveling with children
Water activities	Traveling with children New England residents

Day Q18: Which of the following interest areas did you want to pursue during this trip to Maine?

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Seven in ten overnight winter season visitors stayed in paid accommodations, a greater proportion than the prior winter season (64%).

- Maine overnight visitors stay 3 or 4 nights on average. Length of stay is longer among visitors from outside New England (4.5 nights), first-time visitors (4.4 nights), business travelers (4.2 nights), and those traveling with children (4.1 nights).

Type of Accommodation [n=869]

More likely to be:
- Canadians
- Business travelers
- Earning >$75k

29%

71%

■ Unpaid Accommodations   ■ Paid Accommodations

Average Length of Stay: 3.7 Nights
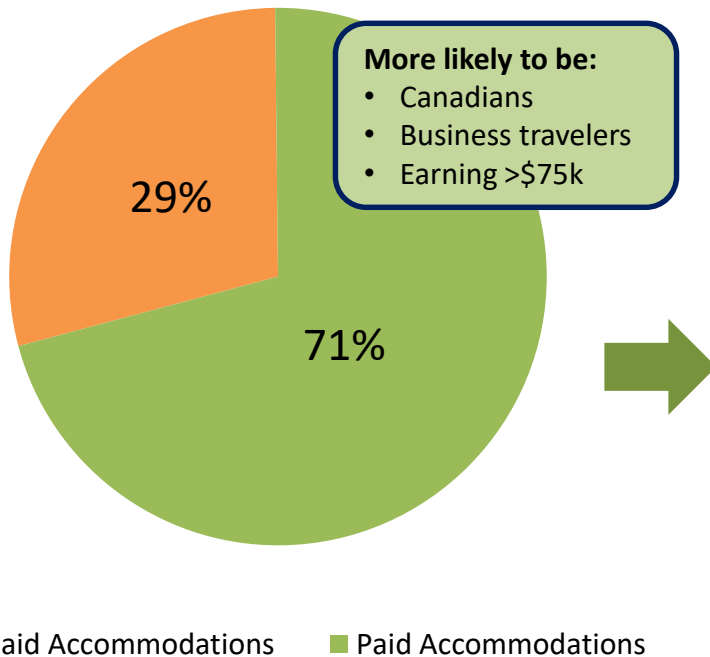
Type of Paid Accommodation

■ 2017 [n=878]
■ 2018 [n=869]

	Hotel/Motel/Resort	Rented Cabin/Cottage/Condo	Inn/B&B	RV Park/Campground or Tent Campground
2017	48%	7%	7%	1%
2018	50%	8%	8%	3%
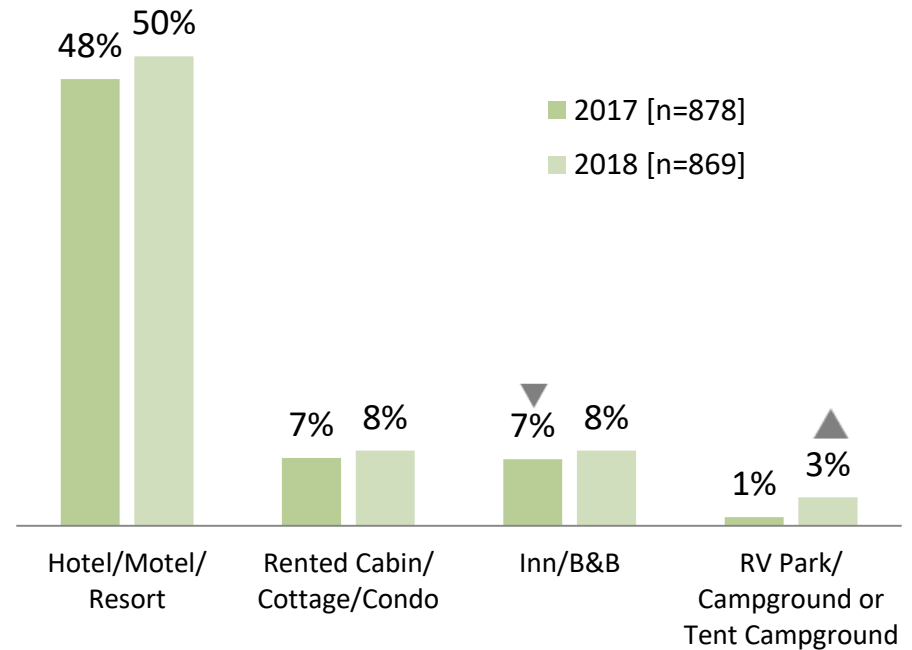
Overnight Q10. On this trip to Maine, how many nights were you away from home?
Overnight Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?
▲▼ *notes significant difference from the prior year at the 95% confidence level*

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Lodging and food expenditures make up the greatest share of expenditures among winter season overnight visitors.

Average Trip Spending per Travel Party – Overnight Visitors*
(Base = Visitors Who Spent Anything in the Category)
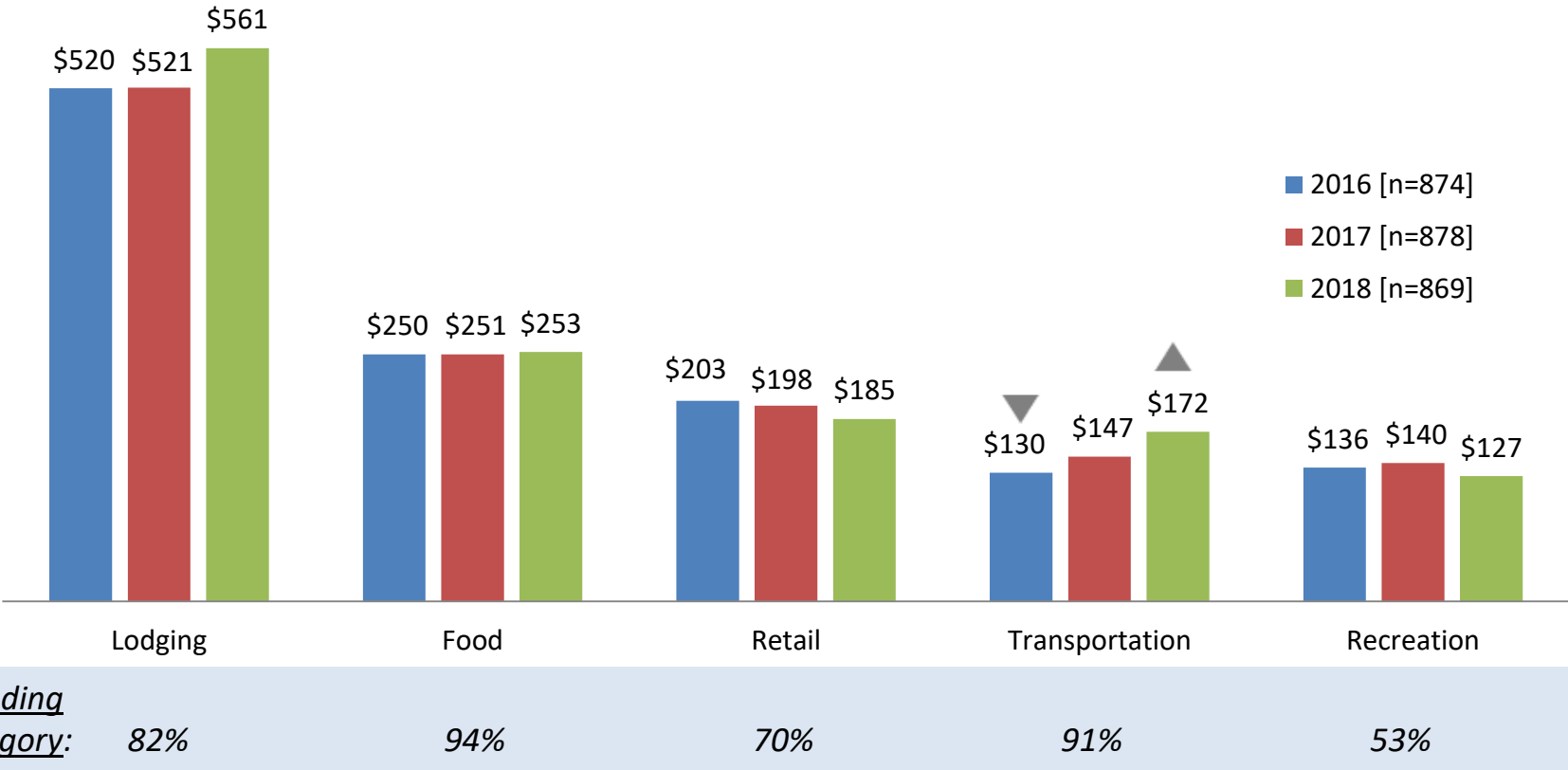
Legend: 2016 [n=874], 2017 [n=878], 2018 [n=869]

Category	2016	2017	2018
Lodging	$520	$521	$561
Food	$250	$251	$253
Retail	$203	$198	$185
Transportation	$130	$147	$172
Recreation	$136	$140	$127

% Spending In Category: Lodging 82%, Food 94%, Retail 70%, Transportation 91%, Recreation 53%

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

Overnight Q38. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

▲▼ notes significant difference from the prior year at the 95% confidence level

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Day visitors spent the most in the *retail* and *food* categories while in Maine.

Average Trip Spending per Travel Party – Day Visitors*
(Base = Visitors Who Spent Anything in the Category)

Legend:
- 2016 [n=457]
- 2017 [n=473]
- 2018 [n=464]

	Retail	Food	Recreation	Transportation
2016	$148	$132	$79	$70
2017	$139	$117	$76	$69
2018	$123	$121	$74	$64
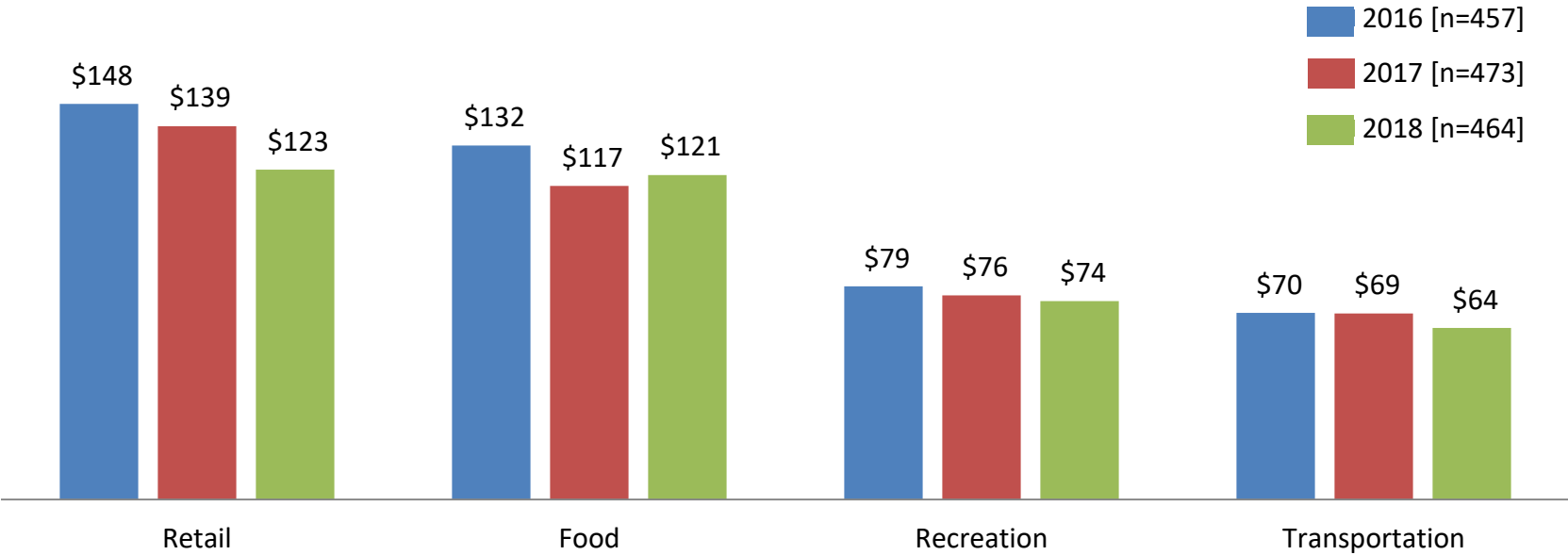
% Spending in Category:	69%	96%	46%	96%

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

Day 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.

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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Trip Evaluation

Maine overnight visitors' expectations were exceeded more than half of the time, with the *overall experience* being the top rated item.

Trip Experience Exceeded Expectations
Winter Overnight Visitors
(n=869)

Overall experience	65%
Friendliness of people	60%
Quality of dining	57%
Welcoming locals who make visitors feel comfortable	56%
Overall quality of customer service	56%
Authentic communities with their own individual personalities	55%
Distinctive, genuine, and unique experiences	55%
Variety of activities available	53%
Quality of lodging	52%
Overall value for the money	51%
Great selection of family attractions and venues	51%
Accessible, diverse, and abundant shopping choices	50%
Availability of family dining	49%
Availability of fine dining	47%
Availability of lodging	47%

Overnight 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.

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Day visitors were most impressed by the *overall experience* of their visit to Maine, as well as the *friendliness of people.*

Trip Experience Exceeded Expectations
Winter Day Visitors
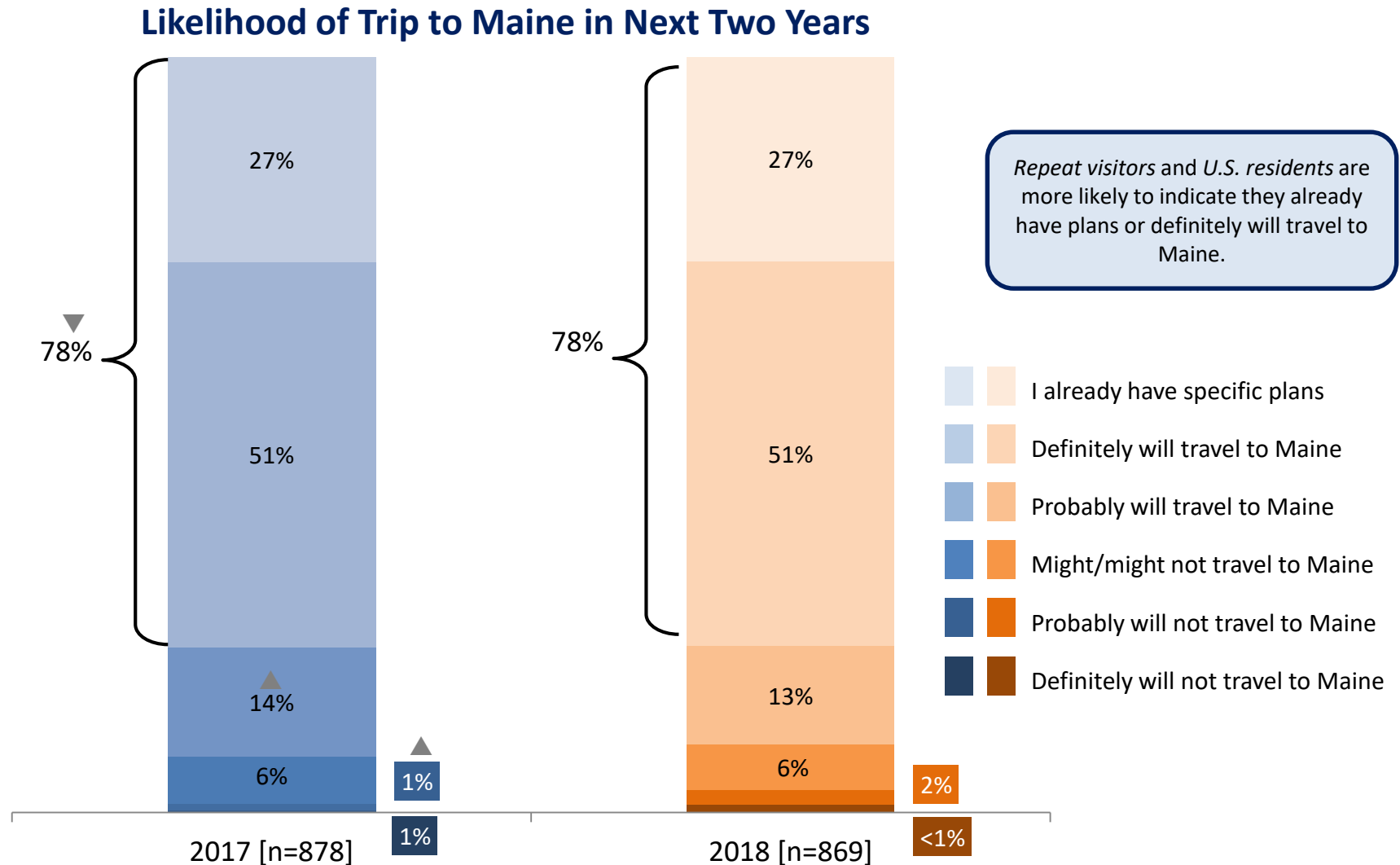**(n=464)**

Category	%
Overall experience	66%
Friendliness of people	64%
Overall quality of customer service	58%
Quality of dining	58%
Welcoming locals who make visitors feel comfortable	56%
Availability of family dining	55%
Authentic communities with their own individual personalities	55%
Distinctive, genuine, and unique experiences	55%
Variety of activities available	52%
Accessible, diverse, and abundant shopping choices	51%
Overall value for the money	50%
Great selection of family attractions and venues	47%
Availability of fine dining	46%

Day 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.
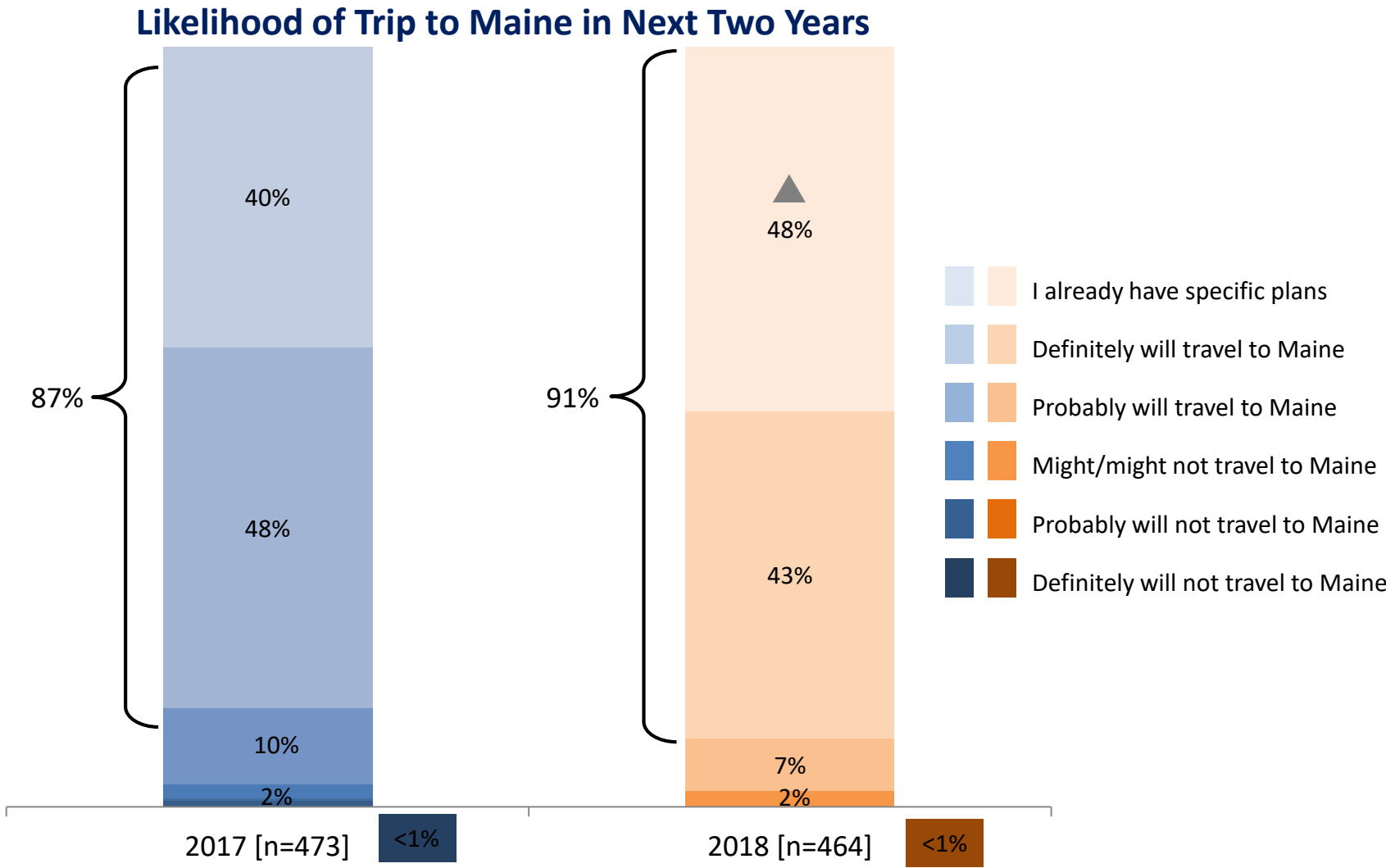
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Future Travel

One in four <u>overnight visitors</u> already has specific plans to visit Maine again within the next two years.

Likelihood of Trip to Maine in Next Two Years

2017 [n=878]

- 27%
- 51%
- 14% ▲
- 6%
- 1% ▲
- 1%

78% ▼

2018 [n=869]

- 27%
- 51%
- 13%
- 6%
- 2%
- <1%

78%

Repeat visitors and *U.S. residents* are more likely to indicate they already have plans or definitely will travel to Maine.

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

Overnight Q44. How likely will you be to travel in Maine in the next two years?
▲▼   *notes significant difference from the prior year at the 95% confidence level*
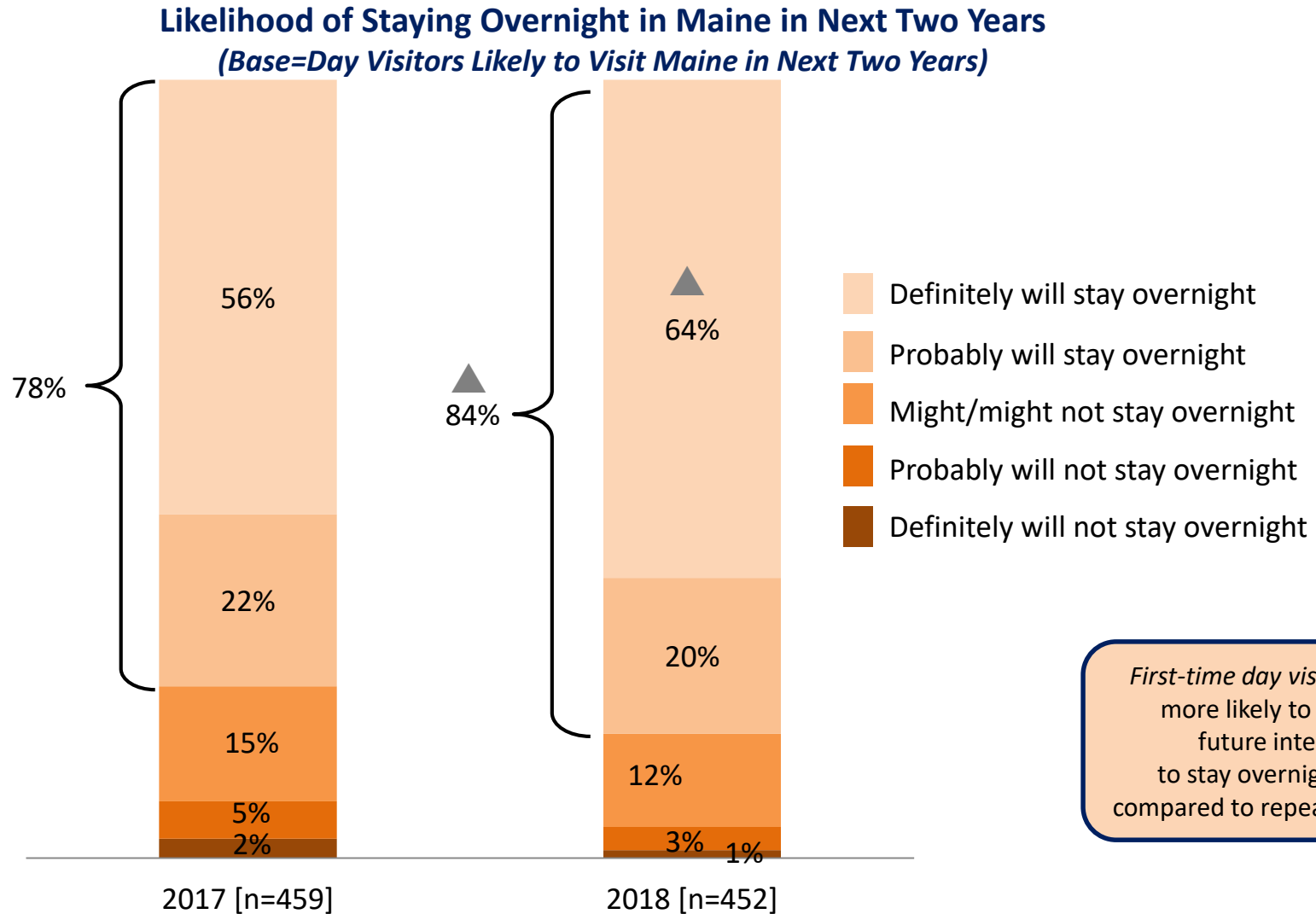
41

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Half of winter season day visitors report they have specific plans to return to Maine in the next two years. This is up from 2017.

Likelihood of Trip to Maine in Next Two Years

2017 [n=473]
- 40%
- 48%
- 10%
- 2%
- <1%
- 87%

2018 [n=464]
- 48% ▲
- 43%
- 7%
- 2%
- <1%
- 91%

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

Day Q31. How likely will you be to travel in Maine in the next two years?

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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

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

2017 [n=459]

- 78%
- 56%
- 22%
- 15%
- 5%
- 2%

2018 [n=452]

- 84% ▲
- 64% ▲
- 20%
- 12%
- 3%
- 1%

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

First-time day visitors are more likely to claim future intent to stay overnight, as compared to repeat visitors.

Day Q32. Assuming you travel in Maine again in the next two years, how likely are you to stay overnight in Maine on one or more of these trips?
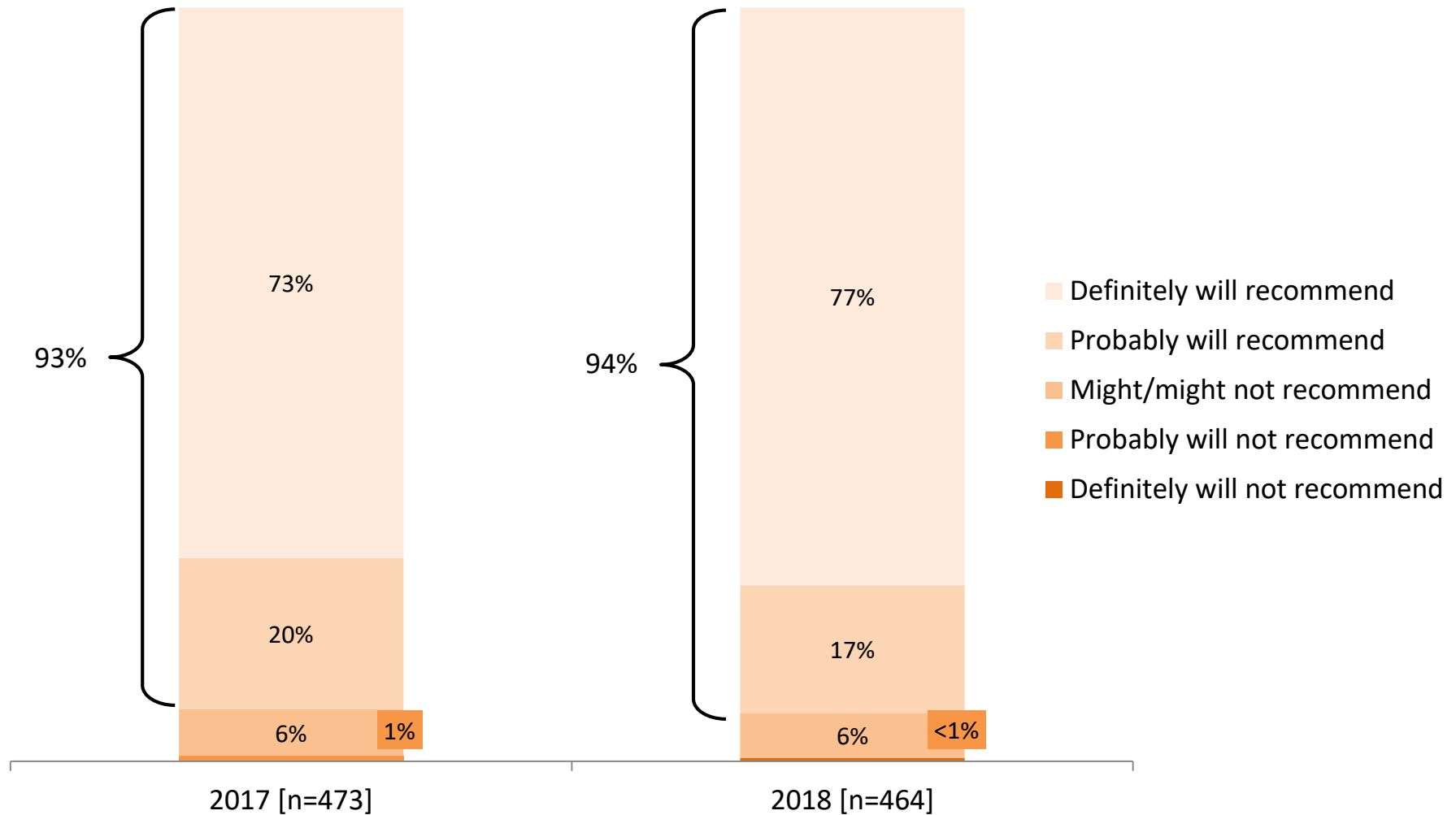▲▼ *notes significant difference from the prior year at the 95% confidence level*

43

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Nine in ten <u>overnight visitors</u> indicate they will recommend Maine as a vacation destination.

93% ▼

94%

Legend:
- Definitely will recommend
- Probably will recommend
- Might or might recommend
- Probably will not recommend
- Definitely will not recommend

2017 [n=878]
- 74% ▼
- 19% ▲
- 6%
- <1%
- 1%

2018 [n=869]
- 74%
- 20%
- 5%
- 1%
- 1%

Overnight Q45: How likely are you to recommend Maine as a vacation destination to friends or relatives?

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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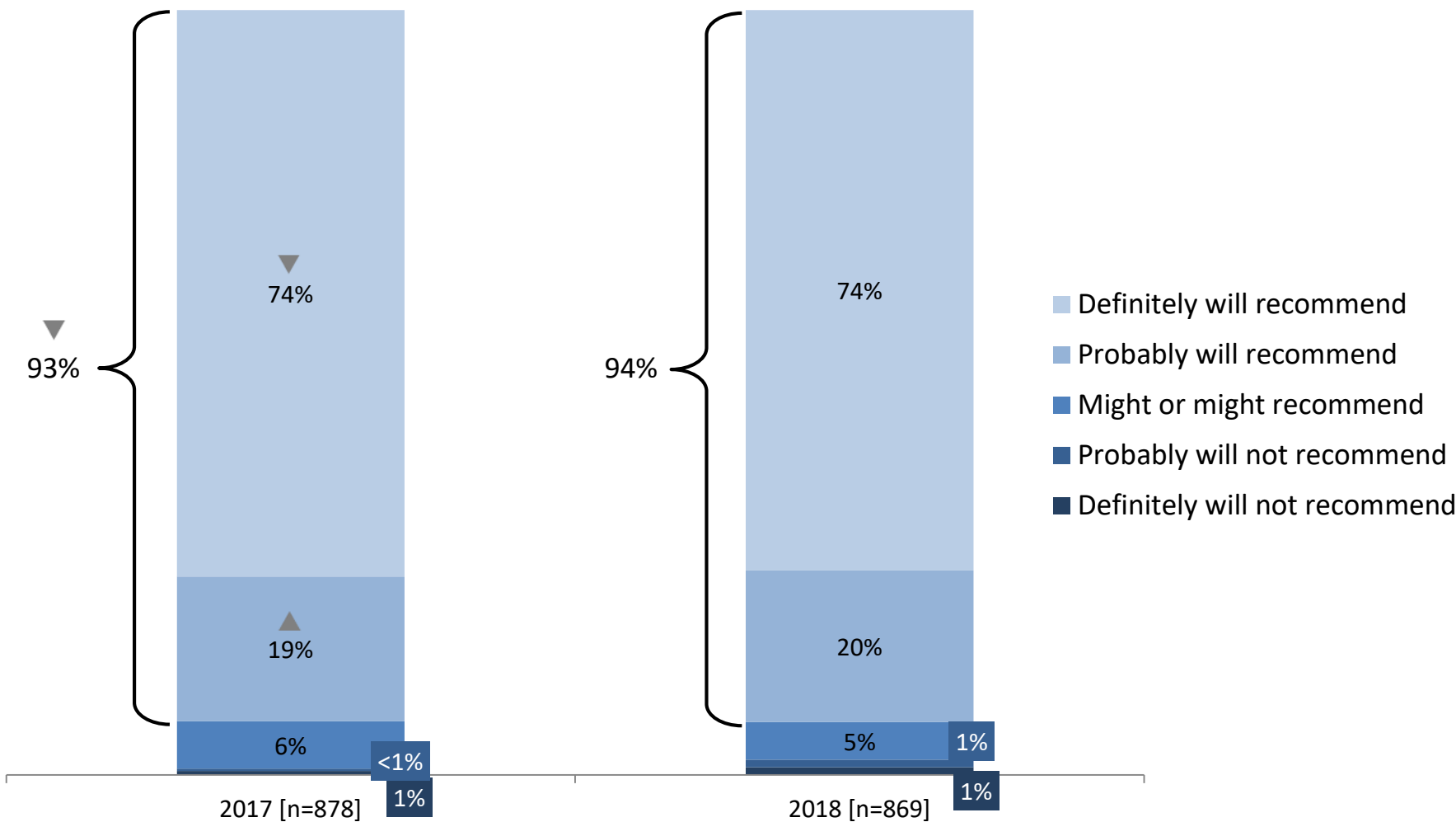
Day visitors also continue to be pleased with their Maine vacation, with 94% stating they are likely to recommend Maine as a vacation destination.

2017 [n=473]
- 73%
- 20%
- 6%
- 1%
- 93%

2018 [n=464]
- 77%
- 17%
- 6%
- <1%
- 94%

Legend:
- Definitely will recommend
- Probably will recommend
- Might/might not recommend
- Probably will not recommend
- Definitely will not recommend

Day Q33: How likely are you to recommend Maine as a vacation destination to friends or relatives?

▲▼ *notes significant difference from the prior year at the 95% confidence level*

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Appendix – Visitor Segment Analysis

Visitor Segment Analysis: Background

- In 2014, DPA conducted a market segmentation study in collaboration with BVK, which allowed for the development of a predictive model to segment and prioritize Maine's visitors. The culmination of this research effort was the creation of a Segment Typing Tool – a model with a short list of questions that can be used to predict segment membership in subsequent research studies, including the ongoing Visitor Profile Research.

- DPA added the questions required for the Segment Typing Tool to the Visitor Profile questionnaire and began collecting this supplemental data in January 2015. We use this classification scheme to compare the perceptions, travel behaviors, and future travel intentions of visitors among the agency targeted segments.

Visitor Segment Analysis: Background

- Three consumer segments were defined as high-priority segments for the Office of Tourism as a result of the market segmentation research:
  - Balanced Achievers
  - Genuine Originals
  - Social Sophisticates

- This Appendix provides a topline profile and comparison of these priority segments as they relate to Maine's 2018 winter season visitors.

- *Important Note: **Sample sizes are extremely low in this seasonal analysis for the Social Sophisticates** segment of both the Overnight and Day Visitors*. *Please use caution in interpreting the findings for this segment.* At the completion of the 2018 research, an in-depth segmentation analysis will be completed for the entire year, at which time sample sizes will be sufficient to draw conclusions for all visitor segments.

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Visitor Segment Analysis: Key Findings

Balanced Achievers:

- Most likely from Mid-Atlantic (overnight)

- Least likely from New England (overnight)

- Most likely to be first-time visitors

Genuine Originals:

- Among the oldest

- Most likely from New England (overnight visitors)

- Most likely to visit the Mid-Coast region

Social Sophisticates:

- Smallest % of visitors

- Most likely to show interest in *food/beverage/culinary activities*

- Most likely to be from Massachusetts (overnight)

- Most likely to visit the Beaches region (overnight)

Almost three-fourths of winter overnight visitors in 2018 could be categorized as either *Balanced Achievers* or *Genuine Originals*.

- *Social Sophisticates* make up a significantly smaller proportion of visitors to Maine during the Winter season.
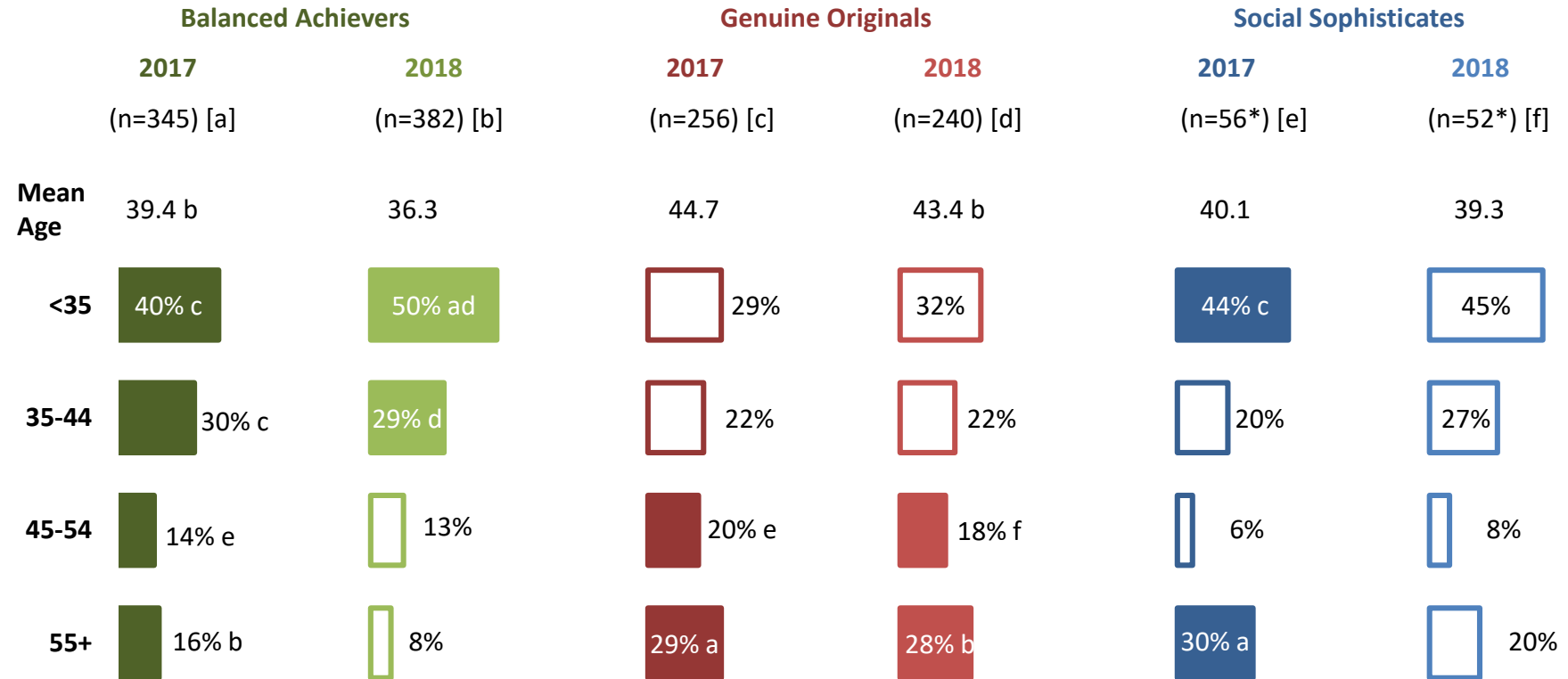
Winter Visitor Segments

	Overnight Visitors		Day Visitors	
	2017 (n=878)	2018 (n=869)	2017 (n=473)	2018 (n=464)
Balanced Achievers	39%	44% ▲	28%	32%
Genuine Originals	29%	28%	35%	34%
Social Sophisticates	6%	6%	7%	5%

Overnight visitors categorized as *Genuine Originals* trend older than *Balanced Achievers*.

Age of Winter Overnight Visitors by Visitor Segment

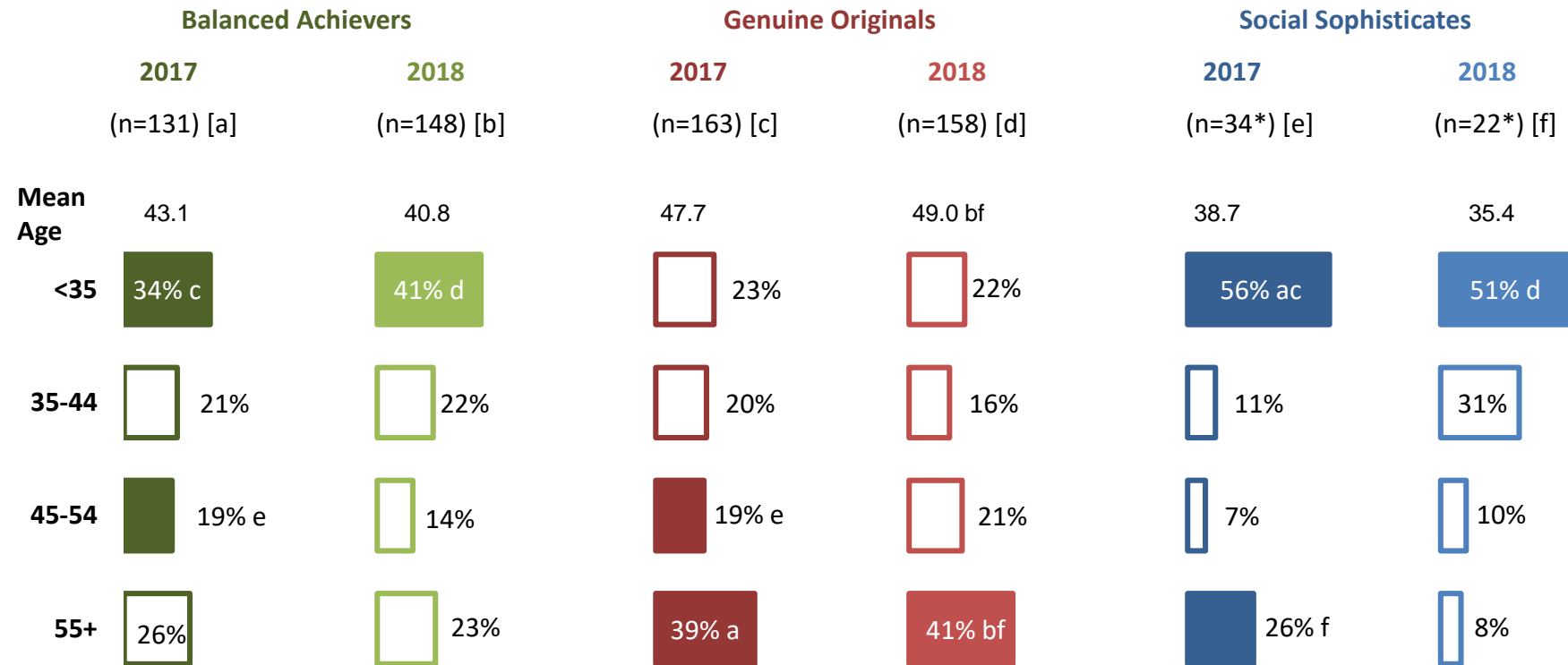|	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017	**2018**	**2017**	**2018**	**2017**	**2018**
	(n=345) [a]	(n=382) [b]	(n=256) [c]	(n=240) [d]	(n=56*) [e]	(n=52*) [f]
Mean Age	39.4 b	36.3	44.7	43.4 b	40.1	39.3
<35	40% c	50% ad	29%	32%	44% c	45%
35-44	30% c	29% d	22%	22%	20%	27%
45-54	14% e	13%	20% e	18% f	6%	8%
55+	16% b	8%	29% a	28% b	30% a	20%

Q1. How old are you?
*Please note small sample size. Use caution when interpreting results.
a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

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Among day visitors, *Genuine Originals* trend older than both *Balanced Achievers* and *Social Sophisticates*.

Age of Winter Day Visitors by Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017	**2018**	**2017**	**2018**	**2017**	**2018**
	(n=131) [a]	(n=148) [b]	(n=163) [c]	(n=158) [d]	(n=34*) [e]	(n=22*) [f]
Mean Age	43.1	40.8	47.7	49.0 bf	38.7	35.4
<35	34% c	41% d	23%	22%	56% ac	51% d
35-44	21%	22%	20%	16%	11%	31%
45-54	19% e	14%	19% e	21%	7%	10%
55+	26%	23%	39% a	41% bf	26% f	8%

Q1. How old are you?
*Please note extremely small sample size. Use caution when interpreting results.
a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

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Overnight visitors categorized as *Balanced Achievers* are <u>more</u> likely to be from the Mid-Atlantic (particularly New York) than those categorized as *Genuine Originals.*

State/Province of Origin by Visitor Segment: Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017	**2018**	**2017**	**2018**	**2017**	**2018**
	(n=345) [a]	**(n=382) [b]**	**(n=256) [c]**	**(n=240) [d]**	**(n=56*) [e]**	**(n=52*) [f]**
United States (NET)	**81%**	**88%**	**90% a**	**93% b**	**91% a**	**90%**
New England (NET)	**44%**	**37%**	**67% ad**	**52% b**	**66% a**	**56% b**
Massachusetts	18%	19%	27% ad	18%	26%	34% bd
Maine	10%	8%	19% a	11%	14%	7%
New Hampshire	4%	4%	7%	9% b	12%	8%
Connecticut	5%	4%	11% a	8% b	6%	6%
Rhode Island	5% bc	1%	2%	2%	7%	--
Vermont	2%	1%	2%	3%	2%	--
Mid-Atlantic (NET)	**37% c**	**51% adf**	**23%**	**41% c**	**25%**	**34%**
New York	17% c	27% adf	10%	15%	20%	13%
New Jersey	10%	11%	4%	8% c	4%	16% e
Pennsylvania	6%	9%	5%	13% c	--	--
Maryland	3%	2%	3%	5%	--	6%
Delaware	--	1%	<1%	--	1%	--
Canada (NET)	**19% ce**	**12% d**	**10%**	**7%**	**9%**	**10%**
Ontario	13% ce	7%	6% e	4%	1%	7%
Quebec	3%	4%	2%	2%	5%	2%
New Brunswick	2%	1%	2%	<1%	1%	1%
Nova Scotia	1%	<1%	<1%	1%	2%	1%

State/Province of Residence
*Please note small sample size. Use caution when interpreting results.
a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

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The proportion of 2018 winter day visitors arriving from each state or province shows little variation by visitor segment.

State/Province of Origin by Visitor Segment:
Day Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=131) [a]	2018 (n=148) [b]	2017 (n=163) [c]	2018 (n=158) [d]	2017 (n=34*) [e]	2018 (n=22*) [f]
United States (NET)	**88%**	**87%**	**95% a**	**93%**	**90%**	**89%**
Massachusetts	42%	37%	34%	37%	50%	55%
Maine	34%	32%	41% e	35%	23%	22%
New Hampshire	11%	15%	15%	14%	17%	12%
Rhode Island	2%	<1%	2%	1%	--	--
Vermont	--	3%	3%	5%	--	--
Canada (NET)	**12% c**	**13%**	**5%**	**7%**	**10%**	**11%**
Quebec	8% c	4%	1%	2%	5%	--
New Brunswick	3%	8%	4%	5%	5%	11%
Nova Scotia	<1%	<1%	--	--	--	--

Q2. State/Province of Residence
Please note extremely small sample size. Use caution when interpreting results.
a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Overnight regional visitation patterns vary somewhat by visitor segment.

- *Social Sophisticates* are more likely to visit the Maine Beaches region, while *Genuine Originals* are more likely to visit the Mid-Coast, as compared to visitors categorized in other segments.

Primary Regional Destination by Visitor Segment:
Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=345) [a]	2018 (n=382) [b]	2017 (n=256) [c]	2018 (n=240) [d]	2017 (n=56*) [e]	2018 (n=52*) [f]
Maine Beaches	17%	18%	16%	18%	15%	37% bde
Maine Highlands	18%	22% d	17%	12%	14%	19%
Mid-Coast	8%	9%	10%	15% bf	13%	5%
Downeast & Acadia	18%	13%	14%	17%	22%	14%
Greater Portland/Casco Bay	11%	9%	16%	15% b	17%	13%
Maine Lakes & Mountains	12%	15% f	15%	12%	10%	6%
Kennebec Valley	8%	8%	5%	6%	5%	4%
Aroostook County	7%	4%	6%	4%	5%	2%

Overnight Q28. What region in Maine was your primary destination?
Please note small sample size. Use caution when interpreting results.
a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

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Day visitor regional visitation patterns do not differ by visitor segment.

Primary Regional Destination of Day Visitors
By Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=131) [a]	**2018 (n=148) [b]**	**2017 (n=163) [c]**	**2018 (n=158) [d]**	**2017 (n=34*) [e]**	**2018 (n=22*) [f]**
Maine Beaches	30% c	35%	19%	34% c	50% ac	42%
Mid-Coast	9%	10%	6%	13%	4%	8%
Greater Portland/Casco Bay	9%	8%	25% ad	12%	13%	22%
Maine Lakes & Mountains	9%	10%	15%	11%	9%	6%
Downeast & Acadia	16%	13%	16%	10%	8%	5%
Kennebec Valley	3%	7%	8%	7%	5%	8%
Maine Highlands	13%	10%	8%	8%	9%	--
Aroostook County	9% c	6%	3%	3%	--	9%

Day Q21. What region in Maine was your primary destination?
Please note extremely small sample size. Use caution when interpreting results.
a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

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