Maine Office of Tourism

Profile of Travelers to Maine
2019 Fall Season

January 2020

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providing direction
in travel & tourism

A Division of DRI

Profile of Travelers to Maine
2019 Fall Season

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Overview

Overview

The DPA National Travel Survey™ saw an increase in the proportion of Americans taking an overnight trip in the 2019 Fall season from the previous year, for both business and leisure travel. Maine and Connecticut appear to be the two New England states benefitting most from this increase. Maine's share of Fall overnight trips increased to 0.6% in both business and leisure categories.

Conditions that might effect travel to Maine this season were mixed. The U.S. Unemployment Rate remained low, yet the Canadian Exchange Rate dropped as well. Gas prices dropped from the summer months, but the Travel Price Index was relatively high (especially in September). Precipitation levels were typical for Maine, yet September and November were colder than average.

Still, an estimated 11.2 million visitors came to Maine in the Fall of 2019, a 4% increase from 2018 estimates. Of these, an estimated 6.5 million were on an overnight trip and 4.7 million were on a day trip.

While many metrics mirror those seen in previous years, a few notable shifts occurred for the Fall 2019 Visitor Profile:
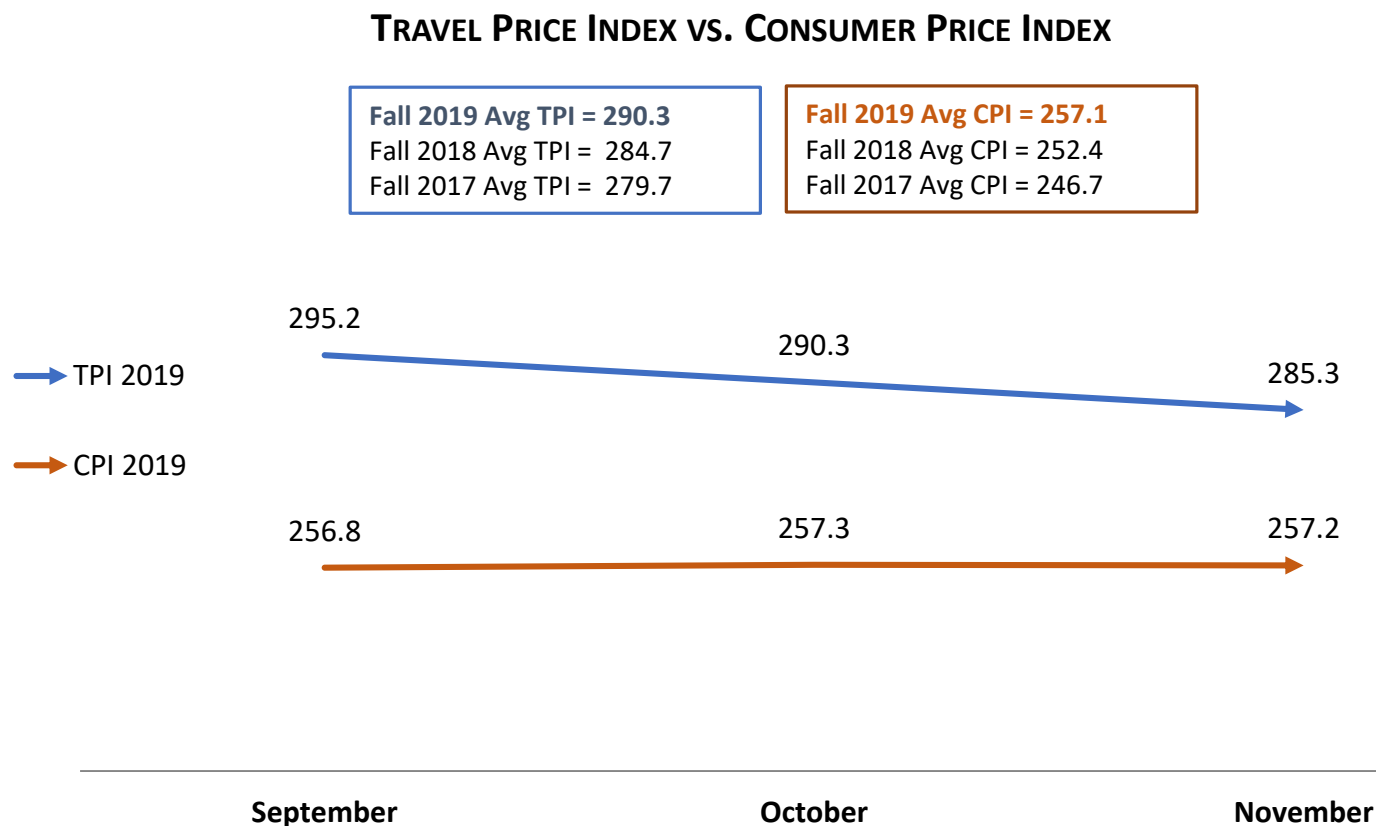
- The average age of overnight visitors to Maine in the Fall season continues to drop consistently. In the Fall seasons of 2013 and 2014 it was almost 49 years of age whereas Fall 2019 saw an average age of roughly 38 years. The proportion in the "Under 35" group has been increasing steadily across time.
- From Fall 2018 to Fall 2019, the proportion visiting from Massachusetts dropped.
- The proportion of overnighters originating from the Mid-Atlantic states increased.
- The Maine Lakes & Mountains region saw in increase in overnight visitors from the previous year.
- With the success of Airbnb and Vrbo (among others), the percentage of overnighters selecting rental accommodations continues to increase.
- While overall spending among overnighters remained stable, their average spending on retail items went down from 2018 to 2019.
- Compared to the previous year, the proportion of daytrippers visiting the Maine Beaches region dropped while the proportion visiting the Portland/ Casco Bay region increased.

A majority rated their overall satisfaction with their Fall 2019 trip to Maine as exceeding their expectations and most (72% overnighters, 86% daytime visitors) believe they will take another trip to Maine in the next couple of years. Almost all (over 90% of both groups) said they will recommend Maine as a destination to their friends and family.

Fall 2019 Season Travel Context

Price Indices across 2019 Fall Months

TRAVEL PRICE INDEX VS. CONSUMER PRICE INDEX

Fall 2019 Avg TPI = 290.3
Fall 2018 Avg TPI = 284.7
Fall 2017 Avg TPI = 279.7

Fall 2019 Avg CPI = 257.1
Fall 2018 Avg CPI = 252.4
Fall 2017 Avg CPI = 246.7

→ TPI 2019

295.2   290.3   285.3

→ CPI 2019

256.8   257.3   257.2

September   October   November

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Fall Temperatures: 2019 Season and 20-year Averages

TEMPERATURE – MAINE FALL 2019

Data source: National Oceanic and Atmospheric Administration, U.S. Department of Commerce
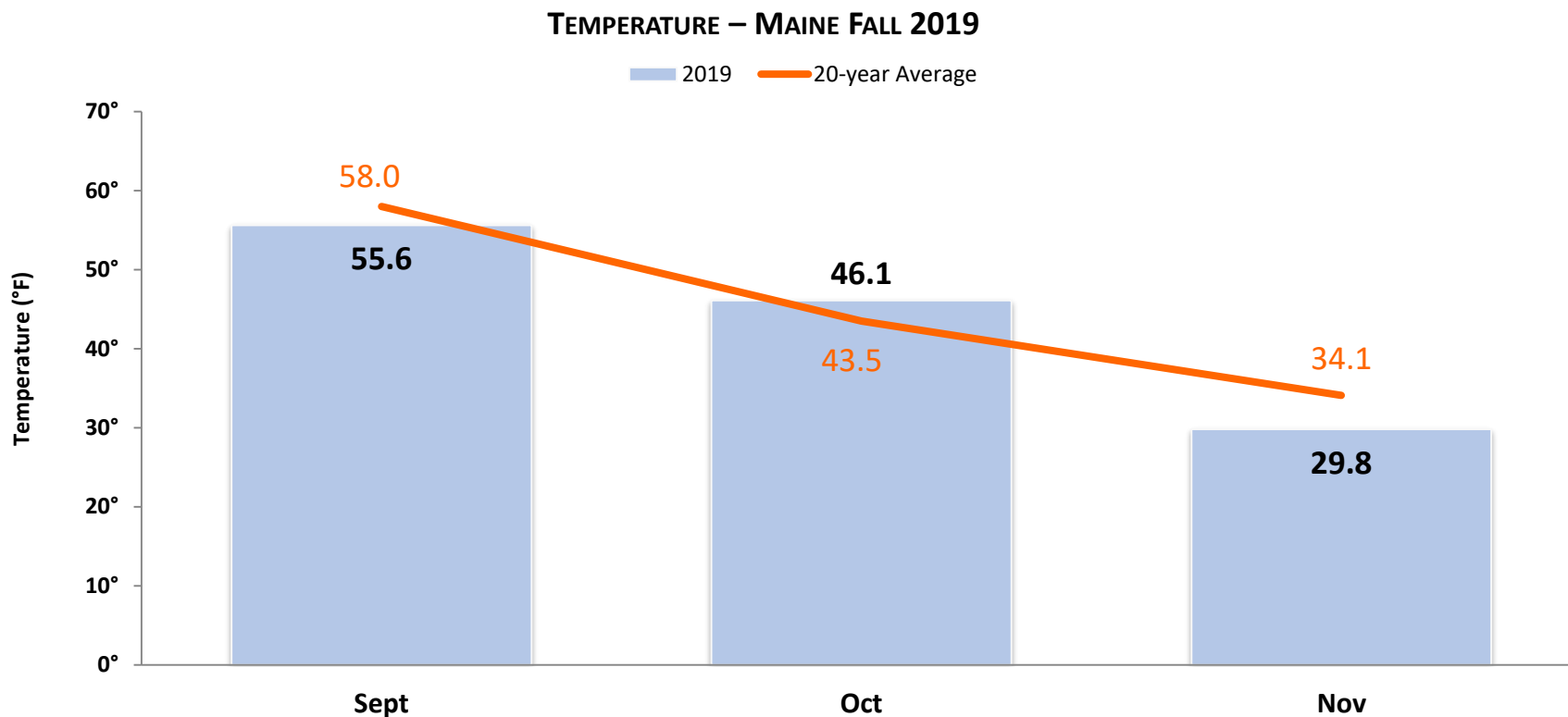
Fall Precipitation Totals: 2019 Season and 20-Year Averages

PRECIPITATION – MAINE FALL 2019

Data source: National Oceanic and Atmospheric Administration, U.S. Department of Commerce
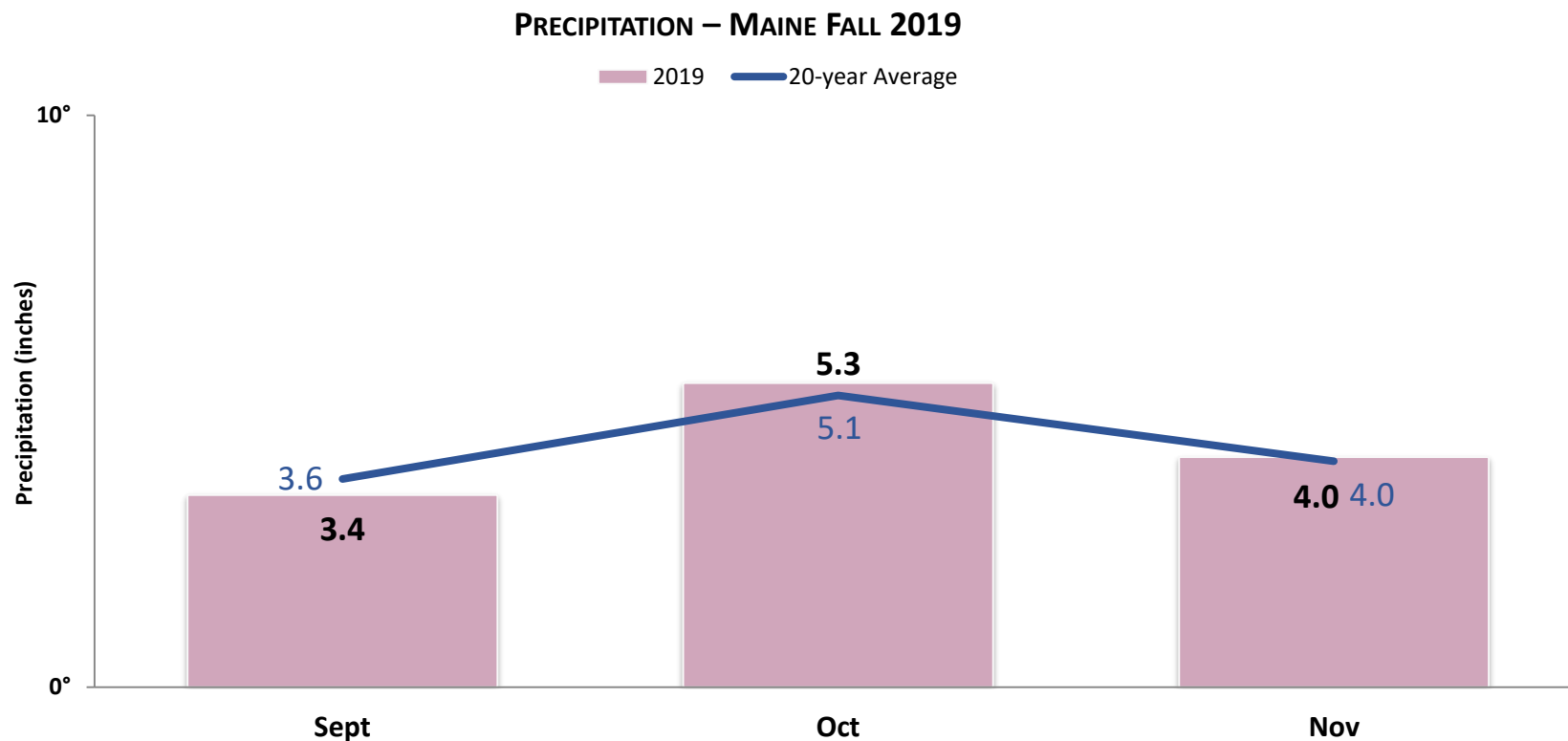
Fall 2019 Average Gas Prices
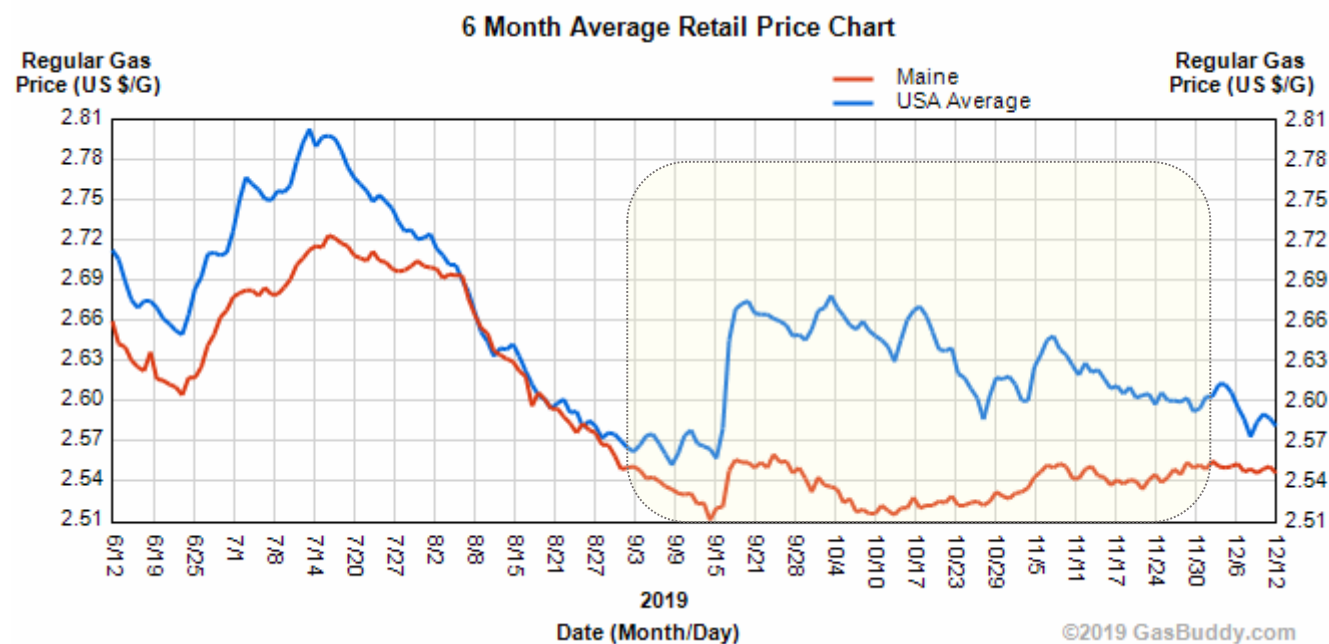
Average Gas Prices: Two-Year Trend
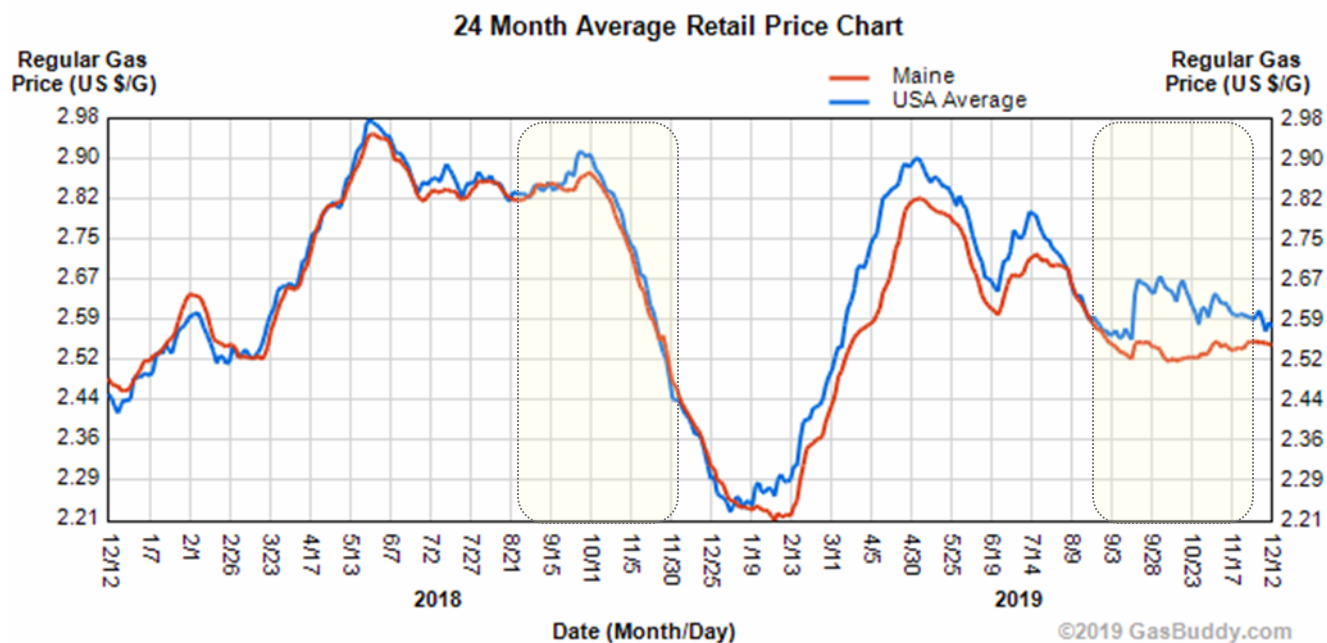
Canadian Dollar vs. U.S. Dollar Across Four Years/ in the Fall Season

CANADIAN EXCHANGE RATE
2016-2019

Fall 2016 average
.7539

Fall 2017 average
.7973

Fall 2018 average
.7647

Fall 2019 average
.7564

2016   **2017**   **2018**   **2019**
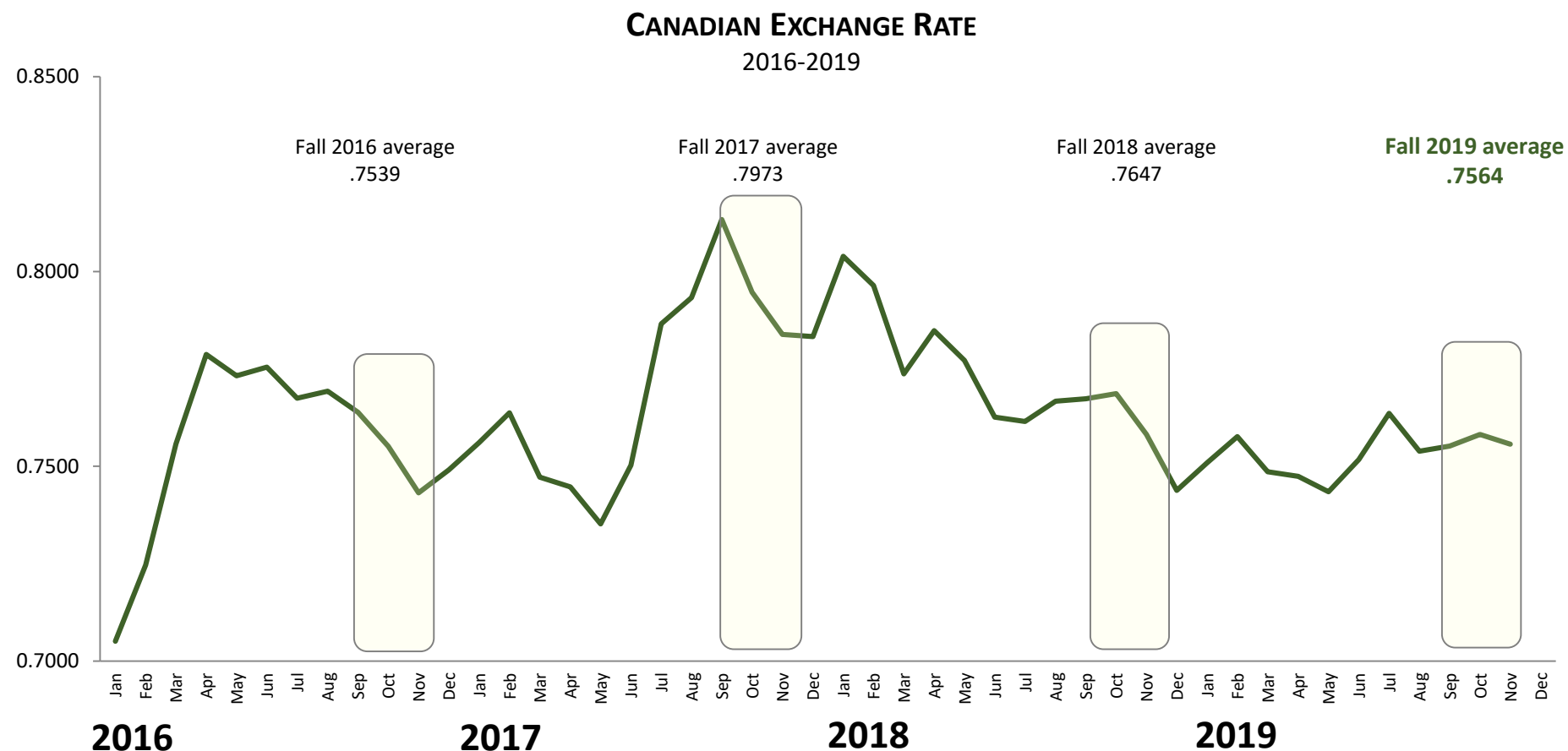
U.S. Unemployment Rate across Four Years/ in the Fall Season

UNITED STATES UNEMPLOYMENT RATE BY MONTH
2016-2019

% Unemployed

2016
2017
2018
2019

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2016	4.9	4.9	5.0	5.0	4.8	4.9	4.8	4.9	5.0	4.9	4.7	4.7
2017	4.7	4.7	4.4	4.4	4.4	4.3	4.3	4.4	4.2	4.1	4.2	4.1
2018	4.1	4.1	4.0	3.9	3.8	4.0	3.9	3.8	3.7	3.8	3.7	3.9
2019	4.0	3.8	3.8	3.6	3.6	3.7	3.7	3.7	3.5	3.6	3.5	
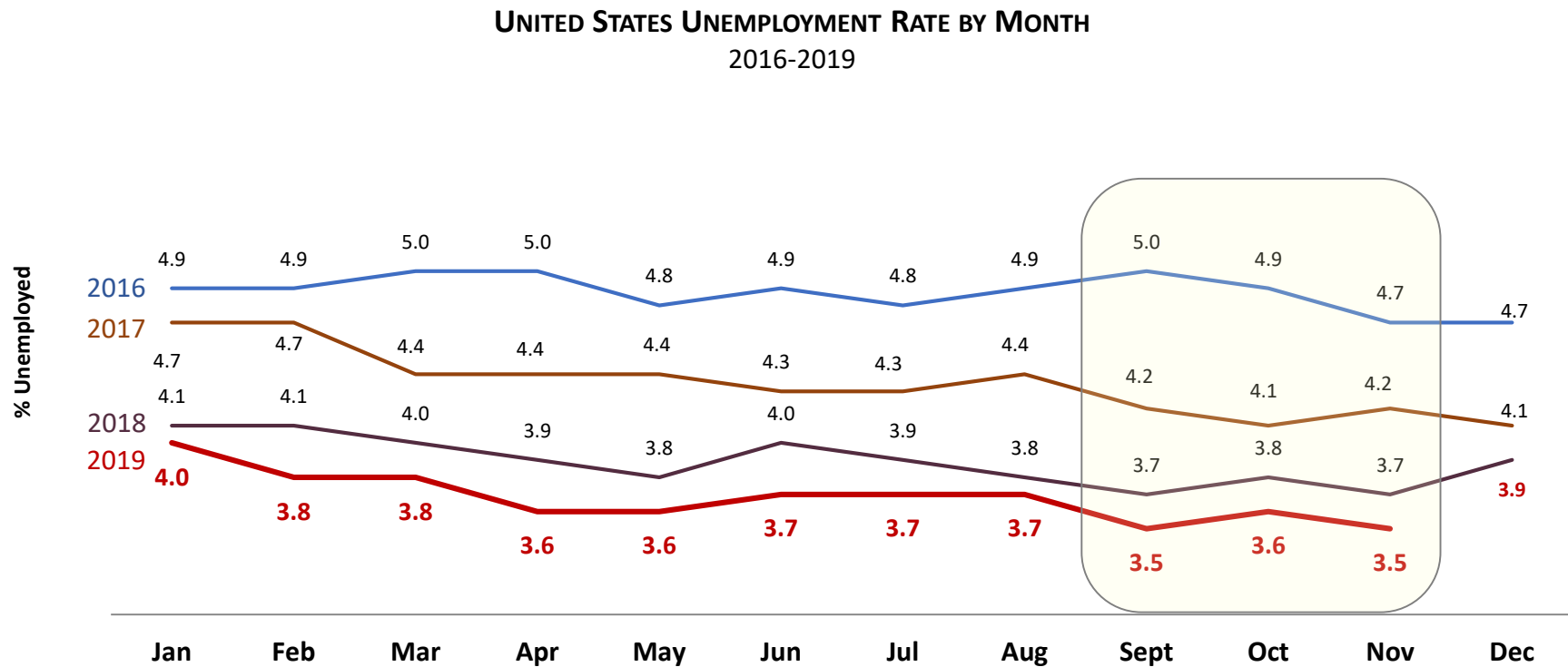
Four Year-Trend: National Overnight Travel in the Fall Season

**PROPORTION OF AMERICANS TAKING A TRIP
DURING THE FALL SEASON**

Overnight LEISURE* trips

Overnight BUSINESS trips

42% 43% 52% **54%**

22% 22% 22% **23%**

■ 2016 [n=5,409]   ■ 2017 [n=5,333]   ■ 2018 [n=5,341]   □ 2019 [n=5,339]

* *In 2018, data collection was modified to only measure leisure travel and business travel, eliminating the separate category of VFR travel.*

Nat'l Travel Survey 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?
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red.**

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Share of Fall Travel Among New England States, Past Four Years

Share of National Trips

Overnight LEISURE Trips*

2016 [n=4,920]
2017 [n=4,858]
2018 [n=6,337]
2019 [n=6,856 trips]

Connecticut: 1.5% 1.5% 1.5% **1.9%**
Massachusetts: 1.3% 1.0% 1.2% **1.4%**
Maine: 0.5% 0.6% 0.4% **0.6%**
New Hampshire: 0.7% 0.4% 0.4% **0.4%**
Vermont: 0.3% 0.2% 0.2% **0.2%**
Rhode Island: 0.3% 0.3% 0.3% **0.2%**

Overnight BUSINESS Trips

2016 [n=2,514]
2017 [n=2,565]
2018 [n=2,748]
2019 [n=2,984 trips]

Connecticut: 1.8% 2.3% 1.9% **2.8%**
Massachusetts: 1.4% 1.3% 1.2% **1.0%**
Maine: 0.6% 0.4% 0.4% **0.6%**
New Hampshire: 0.3% 0.3% 0.4% **0.5%**
Rhode Island: 0.1% 0.2% 0.2% **0.1%**
Vermont: 0.1% 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.

Nat'l Travel Survey 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.

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

Fall 2019
Seasonal Travel Highlights

Estimations of Fall Season Visitation to Maine, Past Three Years

VISITATION ESTIMATES*	Fall 2017	Fall 2018	**Fall 2019**	% Change 2018-2019
Total	10.7 million	10.8 million	**11.2 million**	+4.0%
Overnight Visitors	6.3 million	6.0 million	**6.5 million**	+8.5%
Day Visitors	4.4 million	4.8 million	**4.7 million**	-1.6%

*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.

Visitation estimates provided here are **preliminary** and reflect visitation from September 2019 through November 2019. Adjustments will be made to these estimates at the end of the year, to account for seasonal fluctuations.

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Age of Visitors to Maine in the 2019 Fall Season

AGE OF FALL VISITORS

Overnight Visitors
(n=729)

16%
48%
14%
22%

■ <35
■ 35-44
■ 45-54
■ 55+

Mean = 38.4 years of age
…was 39.9 in Fall 2018

Day Visitors
(n=495)

27%
41%
15%
18%

Mean = 42.5 years of age

Overnight/Day Q1. How old are you?
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red**.
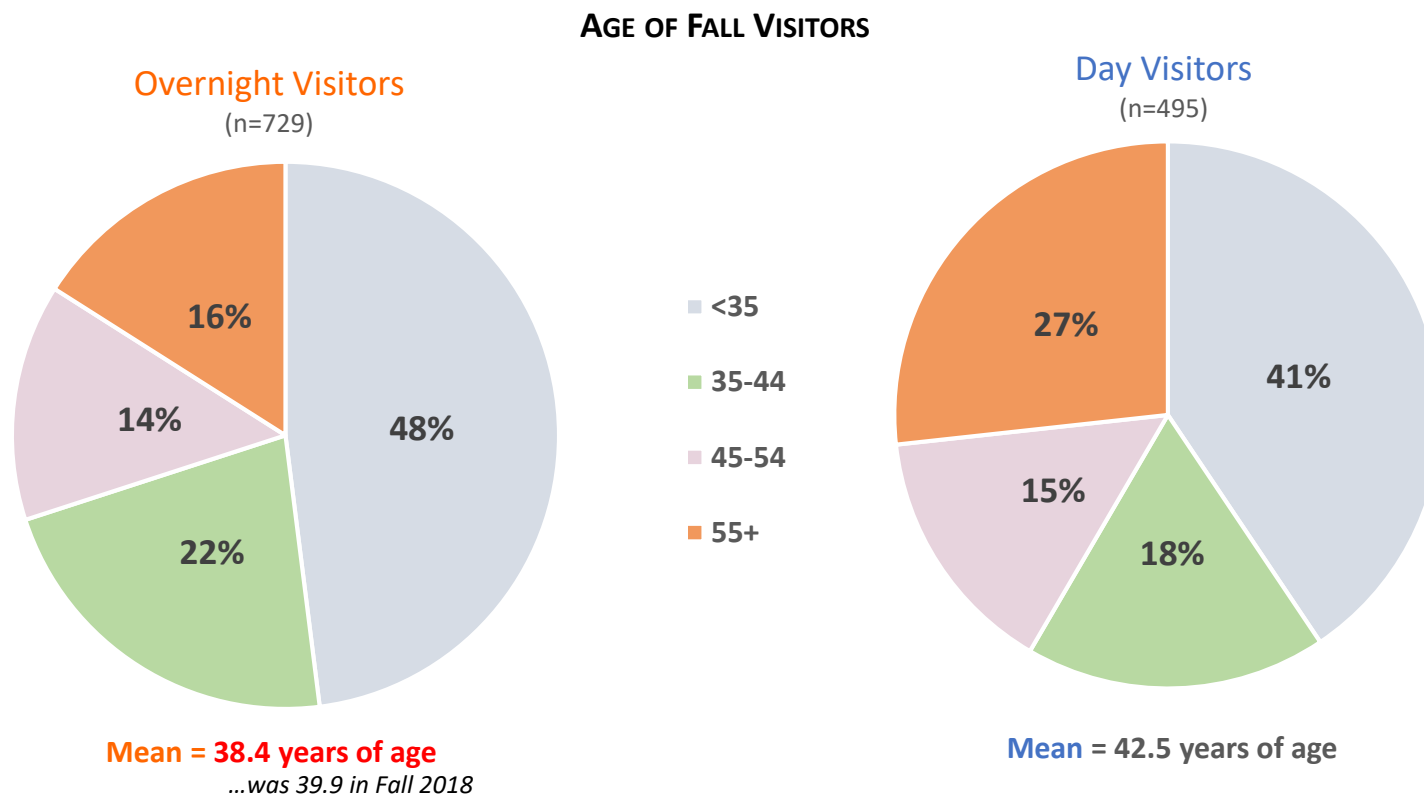
Origin of Overnight Visitors to Maine, Past Four Years

OVERNIGHT VISITOR RESIDENCE

	2016 (n=712)	2017 (n=730)	2018 (n=726)	2019 (n=729)
United States	85%	87%	83%	84%
New England	56%	61%	49%	44%
Massachusetts	27%	27%	29%	20%
Maine	13%	15%	8%	7%
Connecticut	6%	7%	4%	6%
New Hampshire	6%	10%	3%	5%
Rhode Island	2%	2%	3%	4%
Vermont	2%	1%	1%	2%
Mid-Atlantic	29%	26%	34%	40%
New York	15%	12%	19%	17%
Pennsylvania	7%	6%	8%	11%
New Jersey	6%	5%	4%	8%
Maryland	2%	2%	2%	4%
Delaware	<1%	<1%	1%	1%
Washington, DC	<1%	<1%	<1%	1%
Canada	15%	13%	17%	16%

Q2. State/Province of Residence

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

Origin of Daytrippers to Maine, Fall 2019

DAY VISITOR RESIDENCE
(n=495)

88% U.S. residents

38% Maine
31% Massachusetts *...was 37% in Fall 2018*
15% New Hampshire
3% Rhode Island
1% Vermont

12% Canadian residents

7% New Brunswick
4% Quebec

Repeat and First Time Visitation, Past Two Years

REPEAT VS. FIRST-TIME VISITORS TO MAINE

Overnight Visitors		**Day Visitors**	
2018 (n=726)	2019 (n=729)	2018 (n=500)	2019 (n=495)

Legend: First-time Visitors, Repeat Visitors

Overnight: 2018 — 24% First-time, 76% Repeat; 2019 — 24% First-time, 76% Repeat

Day: 2018 — 7% First-time, 93% Repeat; 2019 — 8% First-time, 92% Repeat

Primary Destination of Fall Overnight Visitors, Past Four Years

OVERNIGHT VISITORS: PRIMARY DESTINATION

■ 2016 [n=712]   ■ 2017 [n=730]   ■ 2018 [n=726]   ■ **2019 [n=729]**

	Maine Beaches	The Maine Highlands	Downeast & Acadia	Mid-Coast	Greater Portland/ Casco Bay	Maine Lakes & Mountains	Kennebec Valley	Aroostook County
2016	24%	19%	11%	12%	10%	10%	7%	6%
2017	25%	14%	15%	8%	17%	10%	5%	4%
2018	23%	17%	15%	12%	10%	9%	7%	5%
2019	23%	18%	17%	11%	9%	13%	5%	4%

Overnight Q28. What region in Maine was your primary destination?
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red.**

Subgroup Differences in Primary Destination of Overnight Visitors

OVERNIGHT VISITORS: PRIMARY DESTINATION

Business vs. Leisure

Business vs. Leisure
Mainers vs. Other

Unpaid vs. Paid Accommodations
Mid-Atlantic vs. Other

Income $150K or more

US vs. CAN
Leisure vs. Business
Repeat vs. 1st Time visitors
Income $75K or less

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

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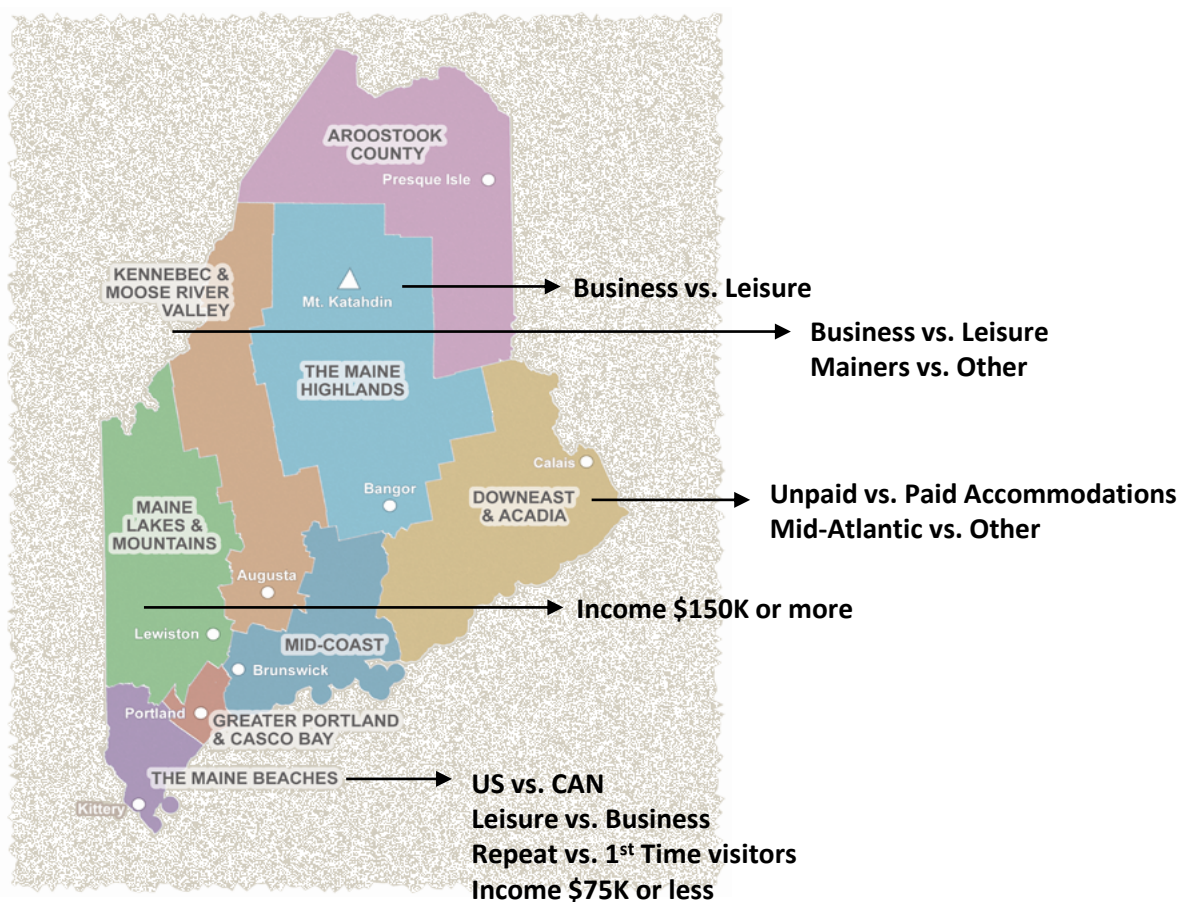
Primary Destination of Day Visitors to Maine, Fall 2019

DAY VISITORS: PRIMARY DESTINATION
(n=495)

Region	Percentage	Note
Maine Beaches	24%	...was 36% in Fall 2018
Downeast & Acadia	13%	
Greater Portland & Casco Bay	12%	...was 6% in Fall 2018
Maine Highlands	12%	
Maine Lakes & Mountains	11%	
Mid-Coast	11%	
Kennebec Valley	10%	
Aroostook County	5%	
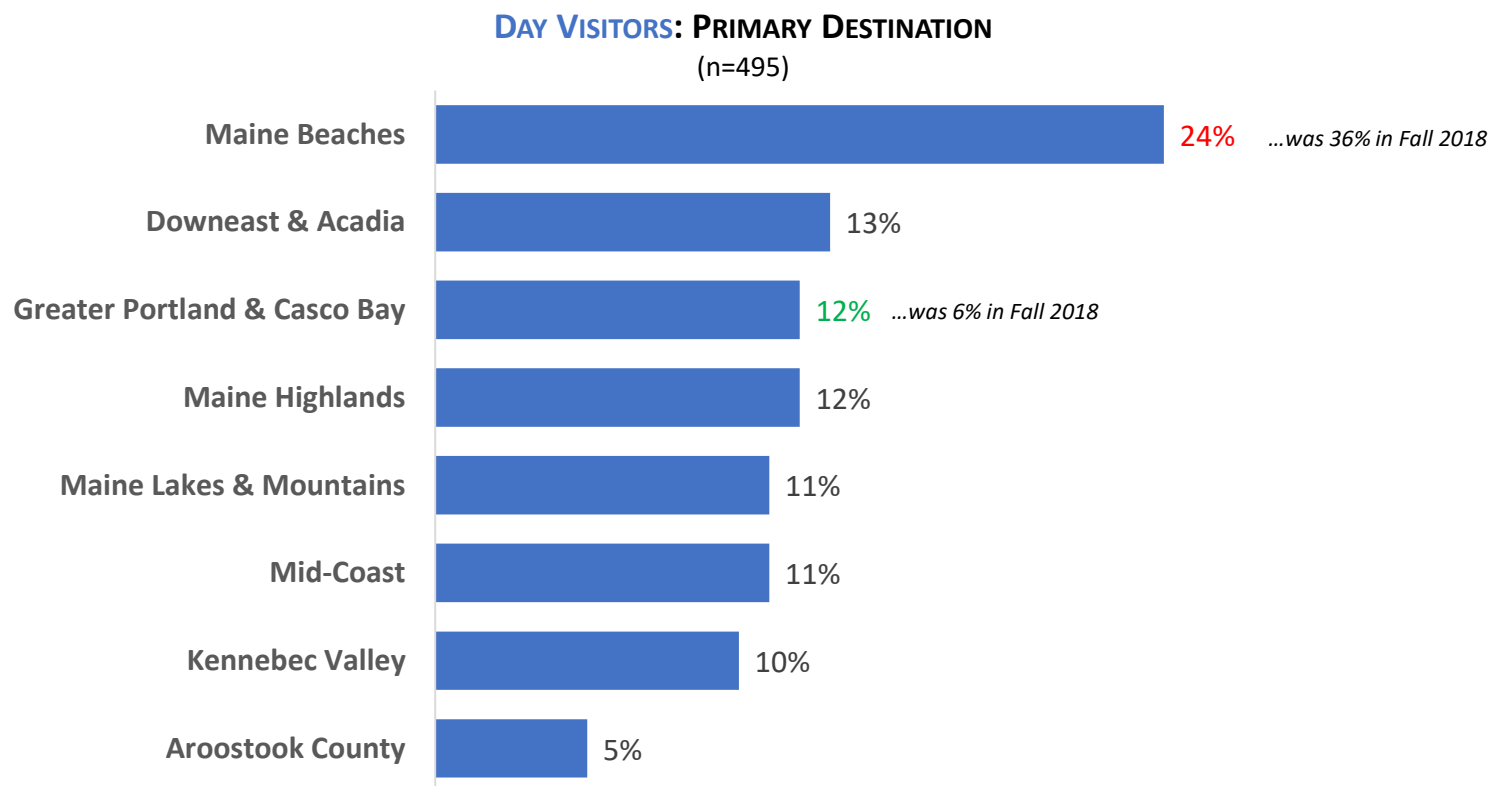
Subgroup Differences in Primary Destination of Day Visitors

DAY VISITORS: PRIMARY DESTINATION

Leisure vs. Business
CAN vs. US

CAN vs. US
1st Time vs. Repeat visitors

Business vs. Leisure

US vs. CAN
1st Time vs. Repeat visitors

US vs. CAN

US vs. CAN
New Englanders vs. Mainers and CAN
Repeat vs. 1st Time visitors
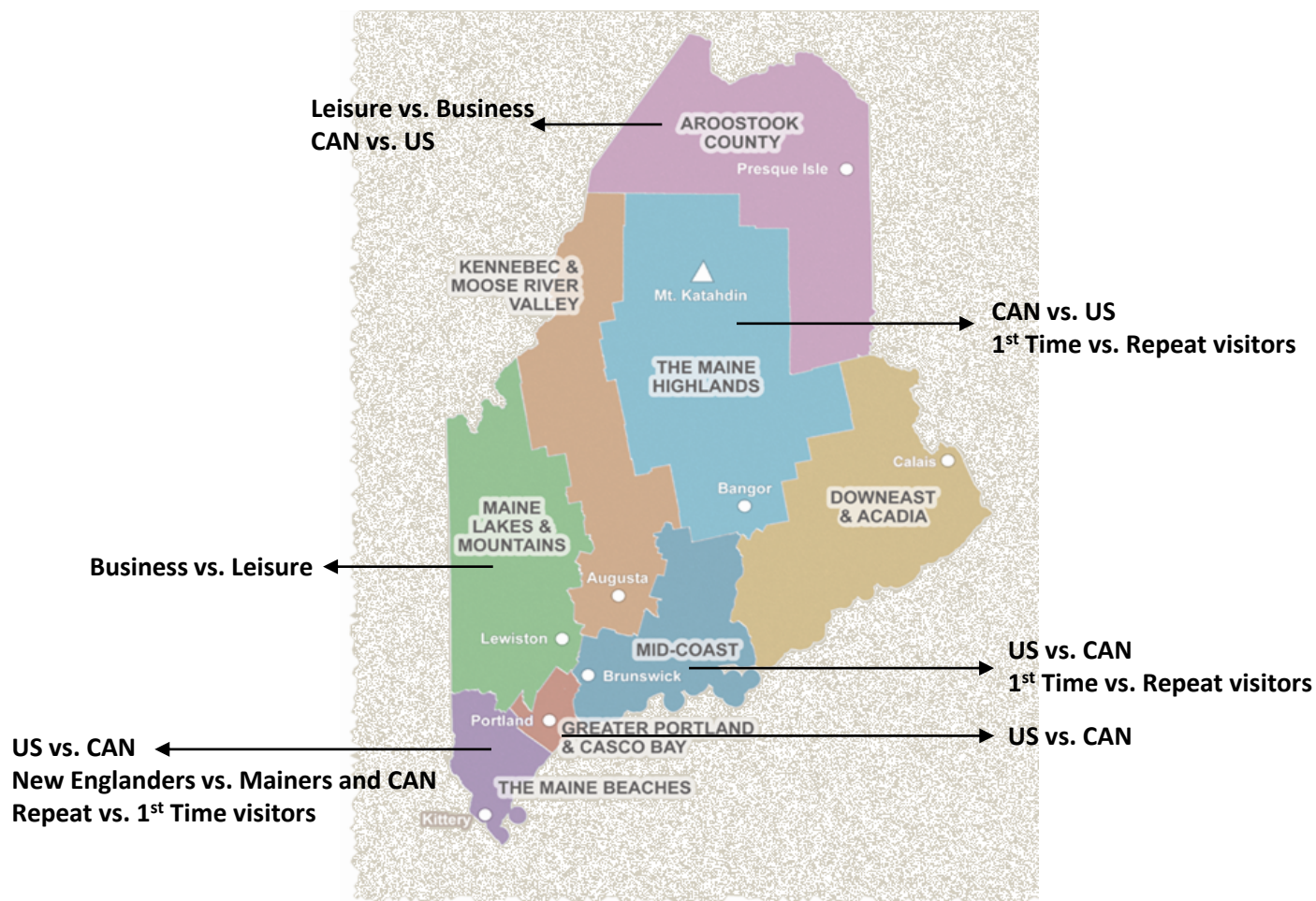
Interests of Overnight Visitors, Past Four Years

OVERNIGHT VISITORS: TRAVEL INTEREST AREAS

% WANTING TO PURSUE INTERESTS

- Overnight Visitors 2016 [n=712]
- Overnight Visitors 2017 [n=730]
- Overnight Visitors 2018 [n=726]
- **Overnight Visitors 2019 [n=729]**

	Food, beverage, culinary	Shopping	Touring or sightseeing	Active outdoor activities (non-water)	History or culture	Family fun or children's activities	Water activities	Other
2016	59%	51%	47%	31%	26%	27%	23%	5%
2017	60%	51%	44%	33%	26%	24%	16%	6%
2018	65%	54%	51%	38%	33%	28%	21%	5%
2019	62%	51%	50%	38%	34%	28%	21%	4%

Interests of by Day Visitors, Fall 2019

DAY VISITORS: TRAVEL INTEREST AREAS
(n=495)

Interest area:		% wanting to pursue
Shopping	🛍️	55%
Food, beverage, culinary	🍽️	53%
Touring or sightseeing	🔭	37%
Active outdoor activities		40%
Water	🏊	19%
Non-water	🥾	30%
Family fun, children's activities	👪	24%
History, culture	🎻	14%

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

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Overnight Accommodations and Length of Stay

TYPE OF ACCOMMODATIONS
(n=729)

Unpaid Accommodations
26%

Paid Accommodations
74%
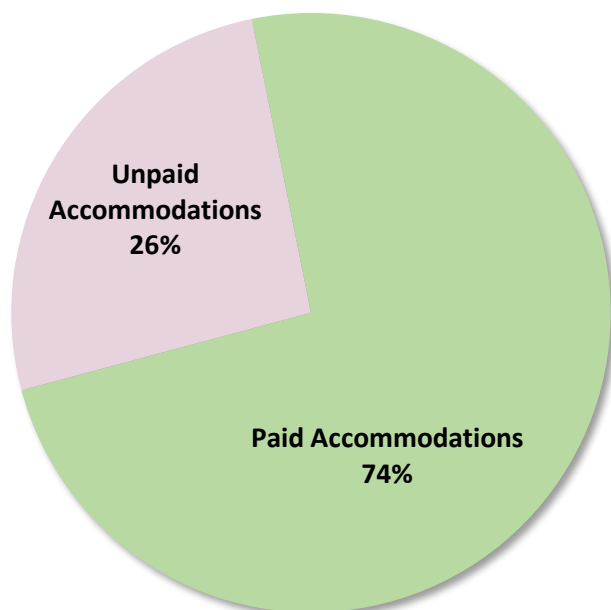
Average Length of Stay:
3.3 nights

TYPE OF PAID ACCOMMODATIONS

■ 2017 [n=730] ■ 2018 [n=726] ■ **2019 [n=729]**

48%

47% 48%

15%

6% 10%

7%

7% 9%

2%

2% 2%

Hotel/Motel/ Resort | Rented Cabin/ Cottage/Condo | Inn/B&B | RV Park/ Campground or Tent Campground

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?
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red**.

Travel Party Spending: Overnight Visitors, Past Four Years

OVERNIGHT VISITORS: TRIP SPENDING PER TRAVEL PARTY
(*Base: Visitors Who Spent Anything in the Category)

Average total spent: $988

Legend: ■ 2016 [n=712] ■ 2017 [n=730] ■ 2018 [n=726] ■ **2019 [n=729]**

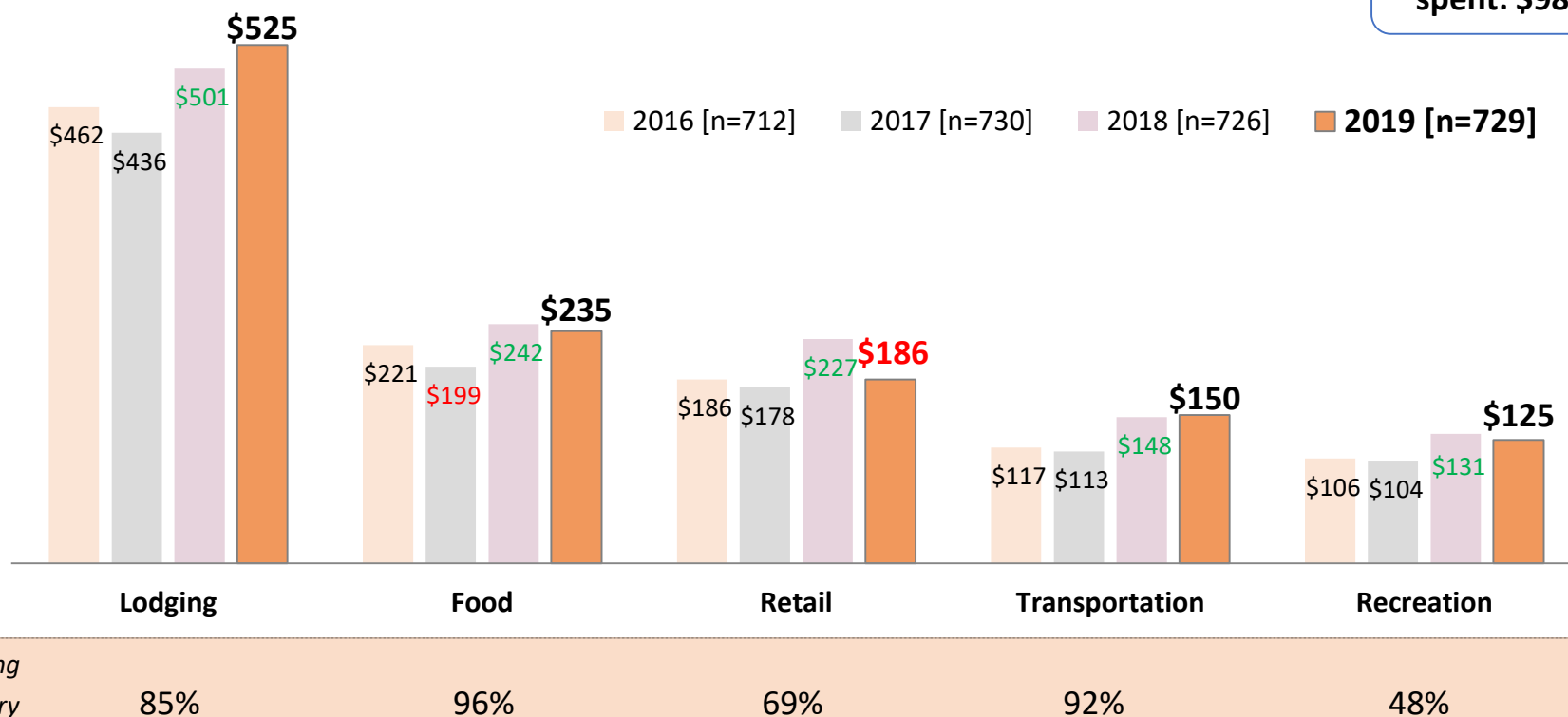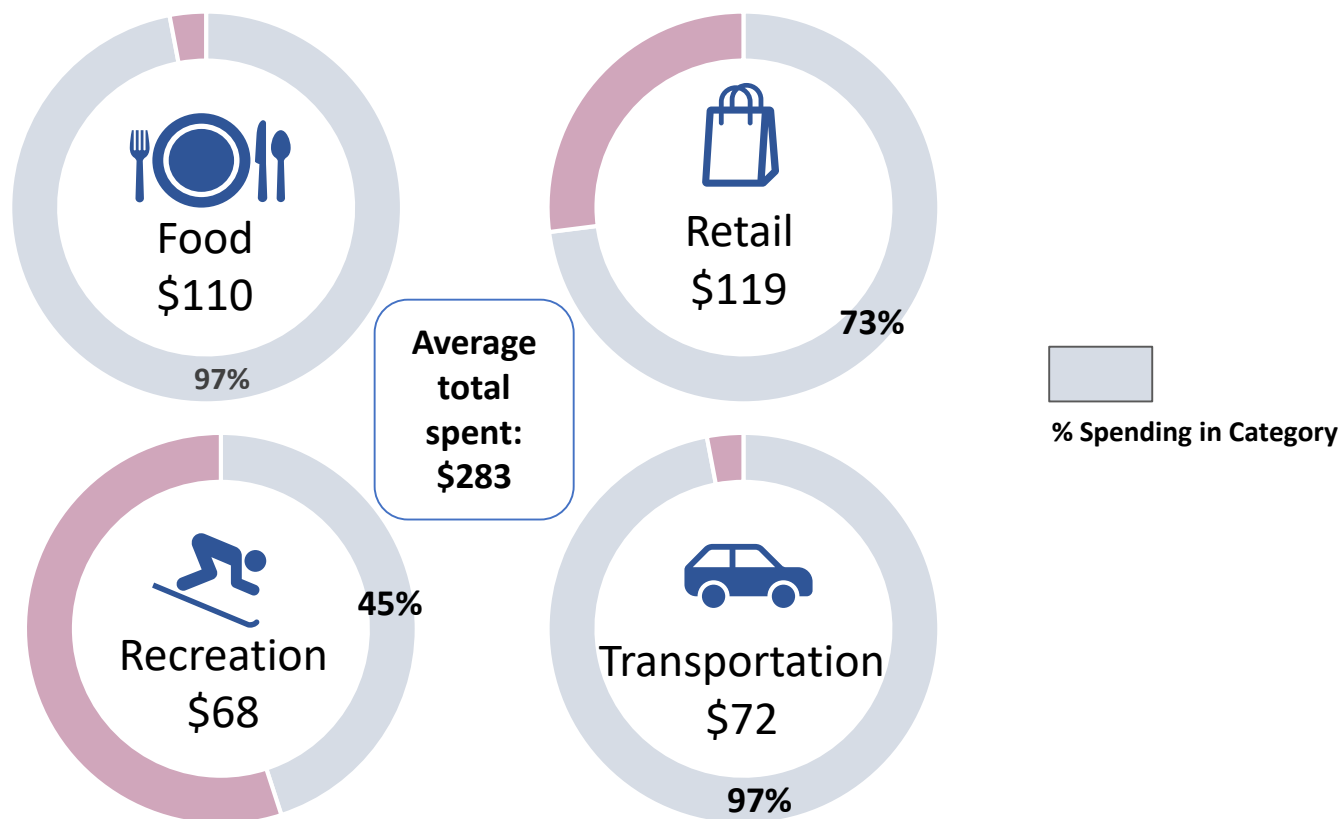| Category	2016	2017	2018	2019
Lodging	$462	$436	$501	$525
Food	$221	$199	$242	$235
Retail	$186	$178	$227	$186
Transportation	$117	$113	$148	$150
Recreation	$106	$104	$131	$125

% Spending in Category	Lodging	Food	Retail	Transportation	Recreation
	85%	96%	69%	92%	48%

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.

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

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Travel Party Spending: Day Visitors, Fall 2019

DAY VISITORS: TRIP SPENDING PER TRAVEL PARTY*

Food
$110

97%

Retail
$119

73%

Average total spent: $283

Recreation
$68

45%

Transportation
$72

97%

% Spending in Category

Average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category.
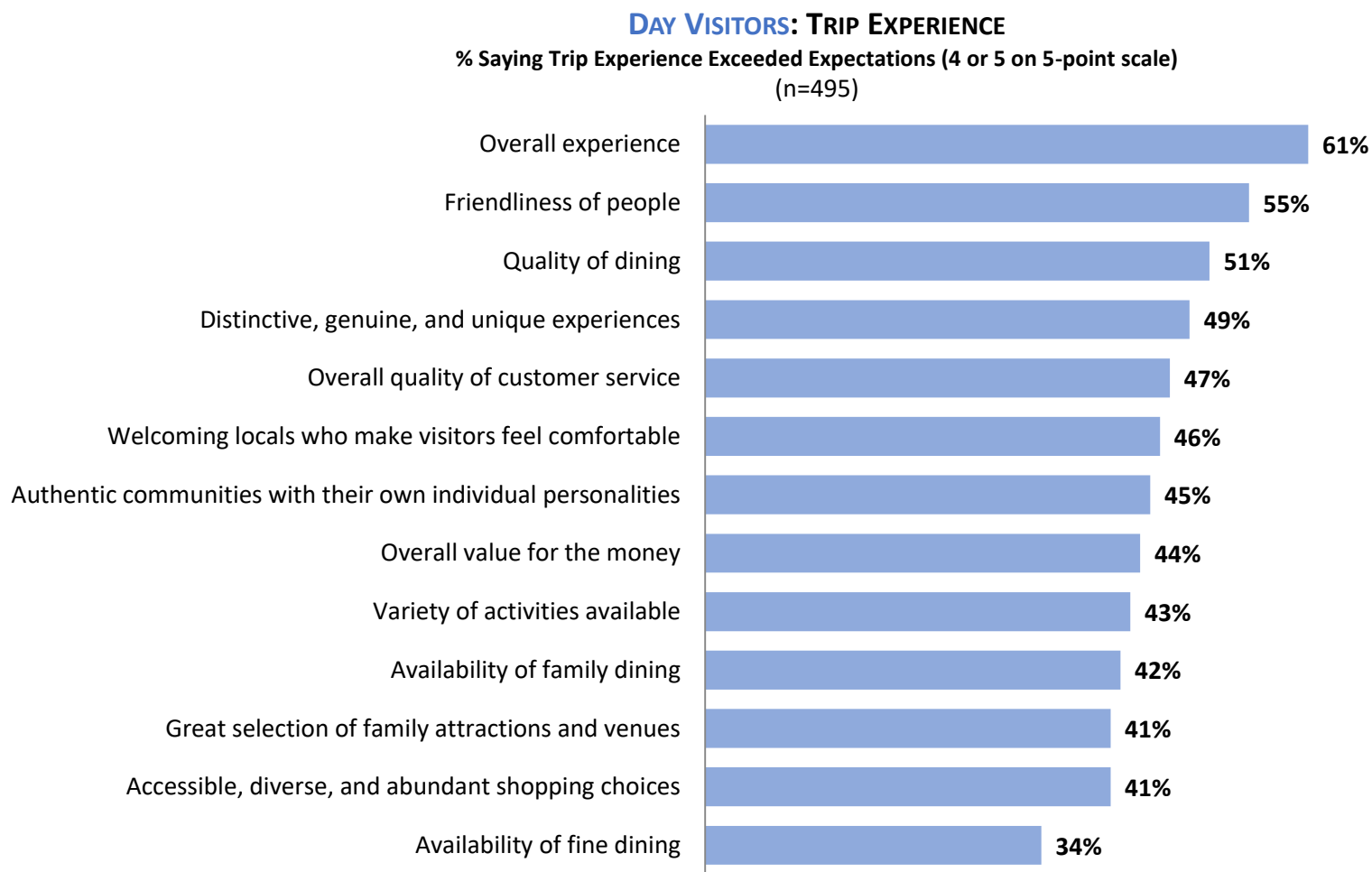
Day Q27. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

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Trip Evaluation

How Trip Compared to Expectations: Overnight Visitors

OVERNIGHT VISITORS: TRIP EXPERIENCE
% Saying Trip Experience Exceeded Expectations (4 or 5 on 5-point scale)
(n=729)

Category	%
Overall experience	65%
Friendliness of people	62%
Welcoming locals who make visitors feel comfortable	57%
Distinctive, genuine, and unique experiences	57%
Overall quality of customer service	56%
Quality of dining	56%
Authentic communities with their own individual personalities	54%
Variety of activities available	51%
Accessible, diverse, and abundant shopping choices	51%
Quality of lodging	50%
Overall value for the money	48%
Availability of lodging	48%
Great selection of family attractions and venues	46%
Availability of fine dining	46%
Availability of family dining	45%

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.

How Trip Compared to Expectations: Day Visitors

DAY VISITORS: TRIP EXPERIENCE
% Saying Trip Experience Exceeded Expectations (4 or 5 on 5-point scale)
(n=495)

Category	%
Overall experience	61%
Friendliness of people	55%
Quality of dining	51%
Distinctive, genuine, and unique experiences	49%
Overall quality of customer service	47%
Welcoming locals who make visitors feel comfortable	46%
Authentic communities with their own individual personalities	45%
Overall value for the money	44%
Variety of activities available	43%
Availability of family dining	42%
Great selection of family attractions and venues	41%
Accessible, diverse, and abundant shopping choices	41%
Availability of fine dining	34%

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.

Future Travel

Likelihood of Returning to Maine Among Overnight Visitors

OVERNIGHT VISITORS:

LIKELIHOOD OF TRIP TO MAINE IN NEXT TWO YEARS

	2017 (n=730)	2018 (n=726)	2019 (n=729)
Have Plans/Definitely Will Return:	78%	76%	**72%**
I already have specific plans	32%	25%	**23%**
Definitely will	46%	51%	**49%**
Probably will	17%	15%	**16%**
Might/might not	5%	7%	**8%**
Probably will not	<1%	1%	**3%**
Definitely will not	<1%	2%	**1%**

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

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

Likelihood of Returning to Maine Among Day Visitors

DAY VISITORS: LIKELIHOOD OF TRIP TO MAINE IN NEXT TWO YEARS
(n=495)

Less likely 2%

Probably will
8%

Already have
specific plans
42%
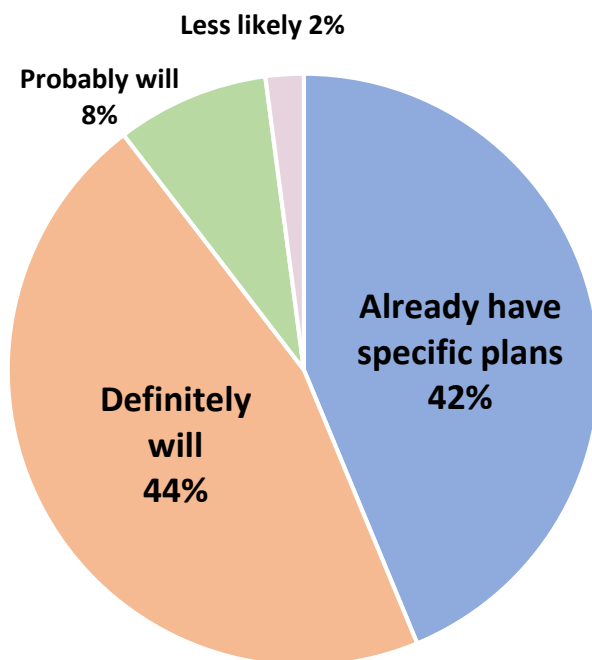
Definitely
will
44%

Likelihood of staying OVERNIGHT:
Base: Those who expressed some likelihood
to travel to Maine (n=466)

61% Definitely will
18% Probably will
14% Might/Might not
7% Less likely

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

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Likelihood of Recommending Maine, Overnight Visitors

OVERNIGHT VISITORS:
LIKELIHOOD OF RECOMMENDING MAINE AS A VACATION DESTINATION

	2017 (n=730)	2018 (n=726)	2019 (n=729)
Probably/Definitely Will Recommend:	94%	93%	**93%**
Definitely will	76%	73%	**67%**
Probably will	17%	20%	**25%**
Might/might not	6%	5%	**7%**
Probably will not	<1%	1%	**<1%**
Definitely will not	<1%	<1%	**<1%**

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

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

Likelihood of Recommending Maine, Day Visitors

DAY VISITORS:
LIKELIHOOD OF RECOMMENDING MAINE AS A VACATION DESTINATION

- Definitely will
- Probably will
- Might/Might not
- Low likelihood

	2017 (n=501)	2018 (n=500)	2019 (n=495)
Definitely will	77%	73%	74%
Probably will	16%	20%	18%
Might/Might not	6%	6%	6%
Total	93%	93%	91%

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

37
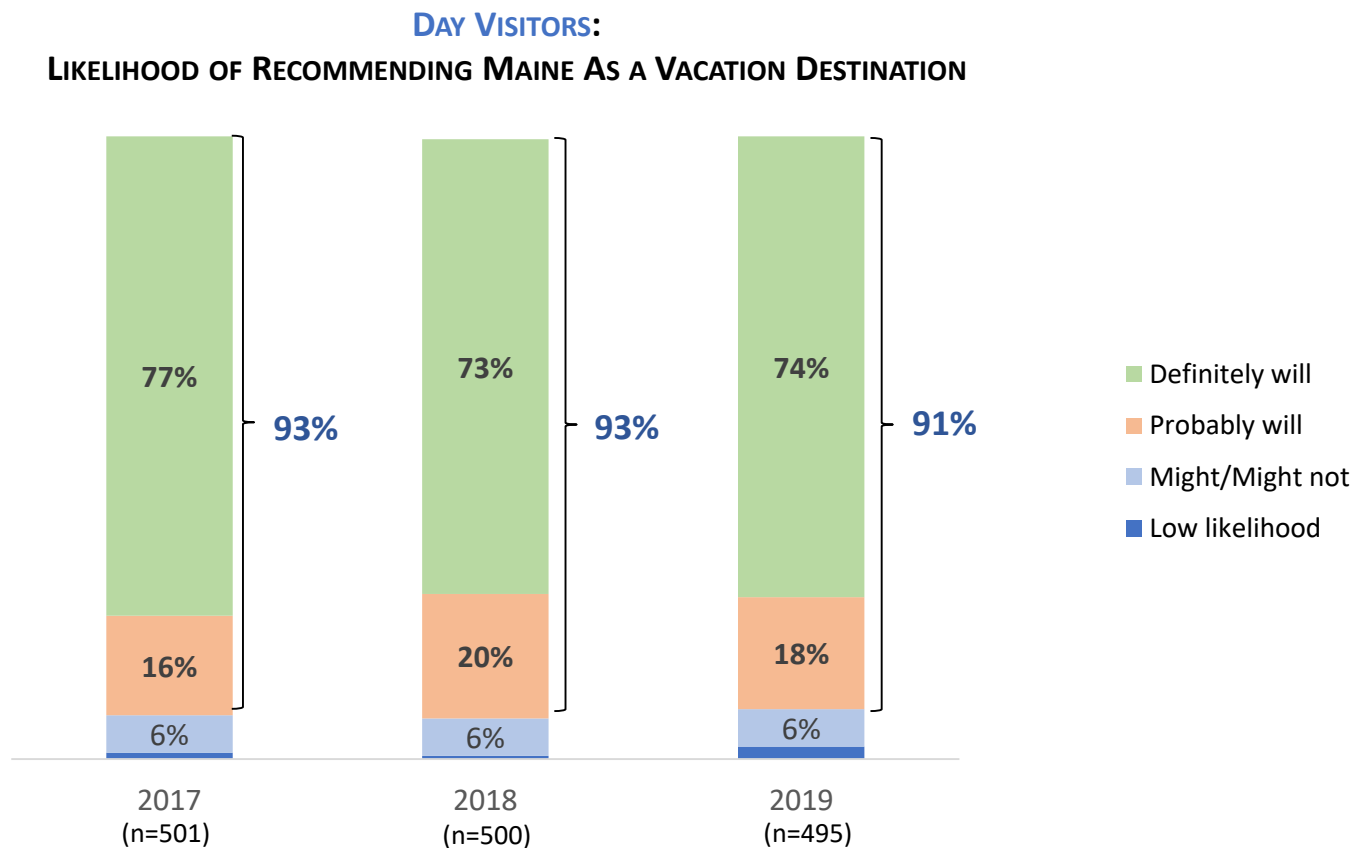
Visitor Segment Analysis

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 classify 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 Segment Typing Tool to the Visitor Profile questionnaire and began collecting this supplemental data in January 2015. We use this classification scheme to understand and compare the perceptions, travel behaviors, and future travel intentions of the 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 section provides a topline profile and comparison of these priority segments as they relate to Maine's 2019 fall season visitors.

- **Important Note**:   Sample sizes are extremely low in this seasonal analysis for the Social Sophisticates segment. Please use caution in interpreting the findings for this segment. At the completion of the 2019 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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Proportion of Fall Season Visitors by Segment

FALL VISITOR SEGMENTS

	Overnight Visitors			Day Visitors		
	2017 (n=730)	**2018** (n=726)	**2019** (n=729)	**2017** (n=501)	**2018** (n=500)	**2019** (n=495)
Balanced Achievers	36%	42%	**39%**	24%	28%	**29%**
Genuine Originals	33%	32%	**30%**	33%	33%	**35%**
Social Sophisticates	9%	7%	**9%**	8%	9%	**8%**

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

Visitor Segment Analysis: Fall Overnight Visitor Highlights

Balanced Achievers

Less likely to live in Massachusetts.

More likely to have taken a business trip in Fall '19.

More likely to have used resources to plan their trip, including Maine Tourism Region websites.

More likely to have used Airbnb, VRBO and/or Uber.

More likely to have had children aged 6-17 years of age in travel party.

Spent the most on lodging, transportation, and overall (on average).

More likely to say trip exceeded expectations (on several measures) and will return to Maine in the next 2 years.

Genuine Originals

Least likely of three segments to have children living in their household.

Social Sophisticates

Less likely to be Maine residents.

Less interested in History or Culture while visiting Maine.

Spent the least, on average, on food and recreation.

Less likely, across several, measures to say their trip exceeded their expectations.

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Visitor Segment Analysis: Fall Day Visitor Highlights

Balanced Achievers

Less likely to be from Massachusetts.

More likely to be from Canada.

Less likely to be Repeat visitors.

More likely than Genuine Originals to be interested in Family activities.

Least likely to visit Maine Beaches region as primary destination.

Spend more, on average, than did Genuine Originals.

Genuine Originals

Less likely than Balanced Achievers to be traveling with children.

More likely than Balanced Achievers to be interested in Active Outdoor activities.

Least likely to say they will stay overnight if returning to Maine.

Social Sophisticates

Least likely to visit Downeast & Acadia region while on their trip.

More likely than Balanced Achievers to visit the Greater Portland & Casco Bay region.

Least likely to say Maine exceeded expectations on offering "distinctive, genuine and unique experiences" or "a great selection of family attractions and venues."

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Age of Fall Overnight Visitors Across Target Segments

OVERNIGHT VISITORS: AVERAGE AGE BY SEGMENT

Years of age

Social Sophisticates (n=67/48*/63)

Genuine Originals (n=238/230/222)

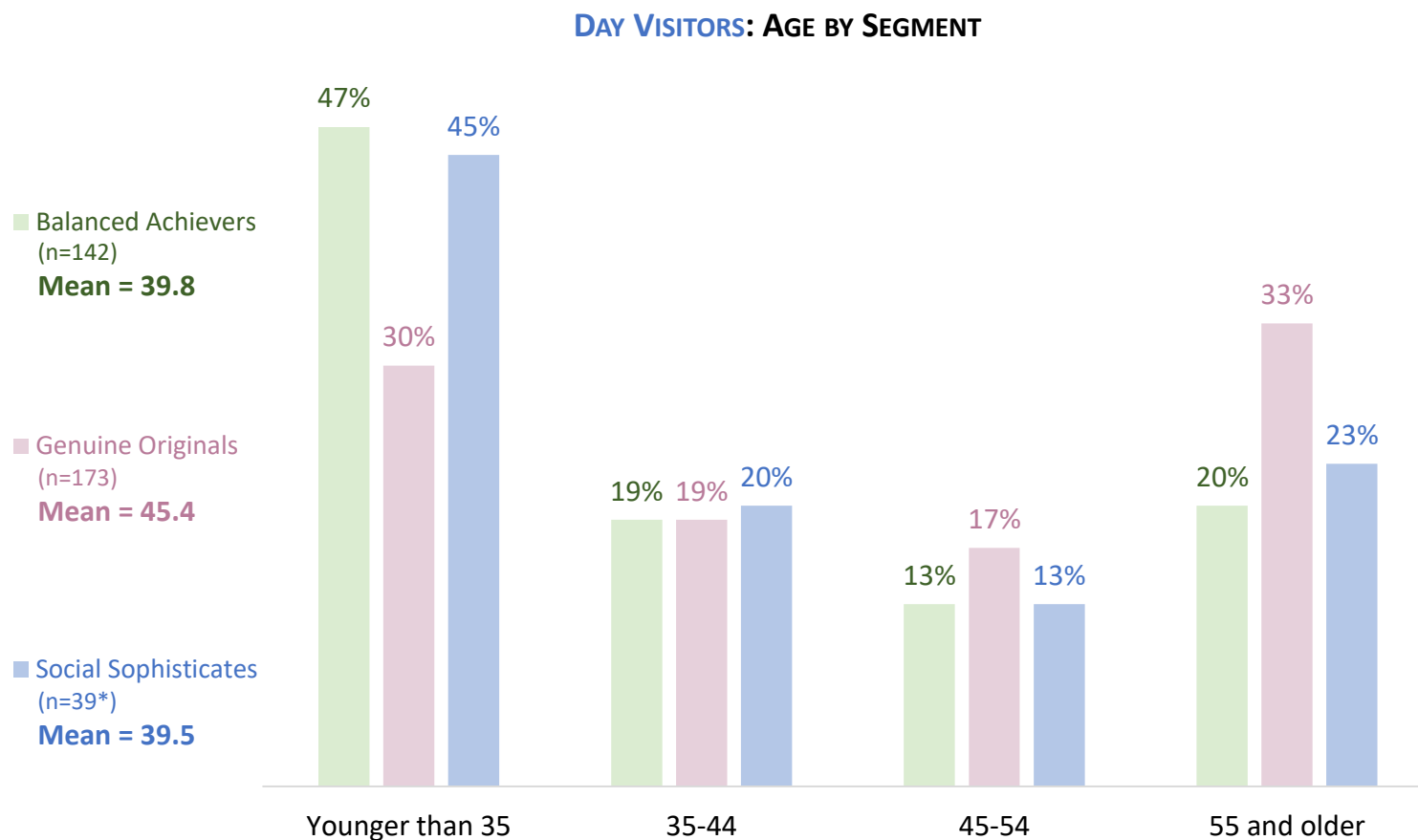**Balanced Achievers** (n=262/308/286)

Q1. How old are you?
*Please note small sample size. Use caution when interpreting results.
 A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red**.

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Age of 2019 Fall Day Visitors Across Target Segments

DAY VISITORS: AGE BY SEGMENT

■ Balanced Achievers
(n=142)
Mean = 39.8

■ Genuine Originals
(n=173)
Mean = 45.4

■ Social Sophisticates
(n=39*)
Mean = 39.5

Younger than 35: 47%, 30%, 45%
35-44: 19%, 19%, 20%
45-54: 13%, 17%, 13%
55 and older: 20%, 33%, 23%

Q1. How old are you?
*Please note small sample size. Use caution when interpreting results.

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Fall Overnight Visitor Origin by Target Segment

OVERNIGHT VISITORS: STATE/PROVINCE OF ORIGIN BY VISITOR SEGMENT

	Balanced Achievers			Genuine Originals			Social Sophisticates		
	2017	**2018**	**2019**	**2017**	**2018**	**2019**	**2017**	**2018**	**2019**
	n=262	n=308	n=286	n=238	n=230	n=222	n=67	n=48*	n=63
UNITED STATES	85%	80%	83%	90%	90%	85%	89%	87%	85%
New England	52%	41%	37%	71%	58%	51%	67%	58%	47%
Massachusetts	22%	23%	15%	33%	39%	21%	32%	44%	26%
Maine	16%	8%	7%	11%	5%	9%	8%	0%	2%
New Hampshire	6%	3%	3%	15%	4%	9%	18%	7%	5%
Connecticut	5%	3%	6%	9%	5%	6%	7%	3%	7%
Rhode Island	2%	4%	5%	1%	3%	3%	0%	3%	6%
Vermont	1%	1%	2%	2%	2%	3%	1%	1%	2%
Mid-Atlantic	32%	39%	46%	19%	32%	33%	22%	29%	38%
New York	12%	23%	20%	7%	16%	11%	16%	21%	19%
New Jersey	8%	4%	10%	4%	3%	6%	1%	4%	6%
Pennsylvania	8%	7%	10%	6%	9%	11%	4%	3%	12%
Maryland	4%	3%	5%	2%	2%	5%	0%	0%	1%
Delaware	1%	1%	1%	0%	1%	<1%	0%	0%	0%
CANADA	15%	20%	17%	10%	10%	15%	11%	13%	15%
Ontario	10%	14%	8%	7%	8%	8%	8%	7%	7%
Quebec	4%	4%	6%	1%	2%	4%	3%	2%	6%
New Brunswick	<1%	1%	1%	1%	0%	2%	1%	4%	2%

State/Province of Residence
*Please note small sample size. Use caution when interpreting results.
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red**.

Fall Daytripper Visitor Origin by Target Segment

DAY VISITORS:
STATE/PROVINCE OF ORIGIN BY VISITOR SEGMENT

	Balanced Achievers			Genuine Originals			Social Sophisticates		
	2017 (n=121)	2018 (n=140)	**2019 (n=142)**	2017 (n=164)	2018 (n=167)	**2019 (n=173)**	2017 (n=41*)	2018 (n=44*)	**2019 (n=39*)**
UNITED STATES	79%	88%	**80%**	89%	95%	**93%**	98%	96%	**89%**
Massachusetts	34%	38%	23%	36%	39%	36%	56%	49%	42%
Maine	31%	25%	35%	29%	34%	39%	21%	22%	31%
New Hampshire	14%	21%	15%	19%	17%	15%	18%	26%	15%
Rhode Island	<1%	2%	5%	2%	1%	1%	3%	0%	0%
Vermont	<1%	1%	2%	3%	4%	1%	0%	0%	0%
CANADA	21%	12%	**20%**	11%	5%	**7%**	2%	4%	**11%**
Quebec	8%	5%	7%	7%	2%	2%	0%	1%	4%
New Brunswick	12%	7%	12%	4%	3%	4%	1%	2%	7%

Q2. State/Province of Residence
*Please note small sample size. Use caution when interpreting results.
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red**.

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Primary Destination of Fall Overnight Visitors by Primary Segment

OVERNIGHT VISITORS: PRIMARY REGIONAL DESTINATION BY VISITOR SEGMENT

	Balanced Achievers			Genuine Originals			Social Sophisticates		
	2017 (n=262)	**2018** (n=308)	**2019** (n=286)	**2017** (n=238)	**2018** (n=230)	**2019** (n=222)	**2017** (n=67)	**2018** (n=48*)	**2019** (n=63)
Maine Beaches	21%	20%	21%	29%	25%	26%	42%	30%	32%
Greater Portland/Casco Bay	14%	7%	5%	22%	13%	10%	17%	18%	10%
Downeast & Acadia	14%	16%	16%	16%	17%	16%	9%	17%	17%
Maine Highlands	18%	22%	21%	10%	10%	14%	7%	12%	14%
Maine Lakes & Mountains	11%	10%	16%	11%	7%	11%	4%	14%	12%
Mid-Coast	8%	11%	9%	7%	15%	13%	12%	4%	9%
Kennebec Valley	7%	7%	7%	3%	8%	5%	6%	0%	6%
Aroostook County	6%	5%	4%	1%	4%	3%	2%	6%	2%

Overnight Q28. What region in Maine was your primary destination?
*Please note small sample size. Use caution when interpreting results.
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red.**

Primary Destination of Fall Day Visitors by Primary Segment

DAY VISITORS: PRIMARY REGIONAL DESTINATION BY SEGMENT

	Balanced Achievers			Genuine Originals			Social Sophisticates		
	2017 (n=121)	2018 (n=140)	**2019 (n=142)**	2017 (n=164)	2018 (n=167)	**2019 (n=173)**	2017 (n=41*)	2018 (n=44*)	**2019 (n=39*)**
Maine Beaches	31%	30%	**18%**	32%	37%	**28%**	71%	62%	**39%**
Greater Portland/Casco Bay	14%	8%	**9%**	12%	4%	**13%**	10%	5%	**15%**
Downeast & Acadia	18%	16%	**13%**	12%	13%	**11%**	9%	2%	**8%**
Maine Highlands	14%	16%	**17%**	10%	8%	**8%**	5%	5%	**6%**
Maine Lakes & Mountains	8%	14%	**14%**	12%	12%	**10%**	2%	5%	**10%**
Mid-Coast	8%	7%	**12%**	10%	14%	**12%**	1%	2%	**13%**
Kennebec Valley	5%	4%	**10%**	8%	6%	**12%**	1%	13%	**6%**
Aroostook County	3%	3%	**5%**	3%	6%	**4%**	1%	2%	**2%**

Day Q21. What region in Maine was your primary destination?
Please note sample size. Use caution when interpreting results.
A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** with **red**.

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Noteworthy Subgroup Variations

Overnight Visitor Subgroup Analyses: Highlights

Age groups:

➢ Travelers 55+ years of age were less likely to be traveling with children, less likely to be interested in outdoor activities, and less likely to have gone on a business trip in the Fall of 2019;

➢ Those younger than 45 were more likely to be on a business trip, be 1st Time visitors to Maine, and to use share/peer-to-peer networks for lodging and transportation;

➢ Those 45 and older were more likely to be on a leisure trip, be traveling with children, be Return visitors, and be interested in family activities.

Income levels:

➢ Travelers in the highest income group ($150K+) spent more nights away from home, on average, vs. those in the lowest income group ($75K or less);

➢ Travelers in the lower income group were more likely than those in the highest group to visit the Maine Beaches region as their primary destination, whereas those in the highest earning group went to the Lakes & Mountains region.

Traveling with children:

➢ Those with children in their travel party were more likely than those without to: visit other nearby states/provinces (mainly NH), go to the VisitMaine.com website and/or Facebook to plan their trip, be interested in shopping, water activities and family fun, and to say they will return to Maine in the next couple of years. They also spent more, on average, on recreation and overall.

1st Time vs. Repeat Visitors:

➢ 1st Time visitors were more likely to be from New York, Ontario or Maryland. They were also more likely to be on a business trip and were more likely to use resources to plan their trip;

➢ Repeat visitors were more likely to be interested in food and shopping activities and spent more, on average, on food and retail. They were also more likely to say they will return to Maine again in the next two years and will recommend Maine as a destination to their family and friends.

Day Visitor Subgroup Analyses: Highlights

Age groups:

➢ Those 55+ were less likely to be interested in Active Outdoor activities (non-water). They were also more likely than younger travelers to live in Maine and less likely to be traveling with children;
➢ Those 45+ were more likely than those 35 and younger to say they are likely to return to Maine in the next two years;
➢ Those 35 and under were more likely than those 55+ to be on a business trip and less likely to be on a leisure trip;
➢ Those 35 and under were more likely than those 45+ to be 1st Time visitors.

Income levels:

➢ Spending on retail and in total increases with household income.

Traveling with children:

➢ Those traveling with children spent more, overall, on average, than did those traveling without children. They also were more likely to say they would stay overnight next time they visit Maine and would recommend Maine as a travel destination to their family and friends.

Visitor origin:

➢ Those visiting from Canada for the day were more likely than those from the U.S. to be interested in shopping;
➢ U.S. residents were more likely than those from Canada to be interested in Active Outdoor activities.

1st Time vs. Repeat Visitors:

➢ Repeat visitors were more likely than 1st Time visitors to be interested in Active Outdoor activities (non-water).

Research Objectives and Methodology

Research Objectives and Instruments

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

Survey Instruments

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

DESCRIPTION OF SURVEY INSTRUMENTS

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

Overnight Visitor
- 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

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Methodology

- This report provides results from the Fall 2019 travel season, describing travel that occurred between September and November 2019.

- Fall data collection occurred monthly between October 3 and December 15, 2019. The number of completed surveys collected for each research component is as follows:

Research Component	Completed Fall Season Surveys
National Travel Survey	5,339
Overnight Visitor Survey	729
Day Visitor Survey	495

- Statistical significance of all differences was calculated at the 95% confidence level. Noteworthy statistically significant differences across years and subgroups are highlighted throughout this report by colors or letters. A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** from the previous year is indicated with **red.**

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