

Maine Office of Tourism Visitor Tracking Research 2012 Calendar Year Annual Report

Regional Insights: Greater Portland & Casco Bay

Prepared by



April 2013

Introduction and Methodology



- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors. **The Maine Office of Tourism Visitor Research Program** is conducted online, with survey participants recruited from the *ResearchNow* national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - **Regional Travel Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders who have taken a day trip in Maine that is at least 50 miles from home within the past four weeks.
 - **National Omnibus Survey**
 - Includes a nationally balanced sample of US residents; and
 - Used to determine the incidence of travel nationwide and Maine’s share of that travel.

- This report outlines results from calendar year 2012, with travel occurring between January 2012 and December 2012.
- Data was collected between January 1st and December 15th 2012. The number of completed statewide surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,497
 - Maine Day Visitor – 1,520
 - National Omnibus Survey – 17,722

- The following report includes data on leisure visitors to the **Greater Portland and Casco Bay** tourism region, and is based on:
 - 159 overnight leisure visitors, and
 - 124 day leisure visitors.



Overnight Leisure Visitors: *Traveler Description*



Overnight Leisure Visitor Demographics

- Overnight leisure visitors to Greater Portland in 2012 have higher income levels and are more likely to be college-educated than visitors to all of Maine. Income levels and the proportion with a college degree are also greater for this region than they were in 2011.

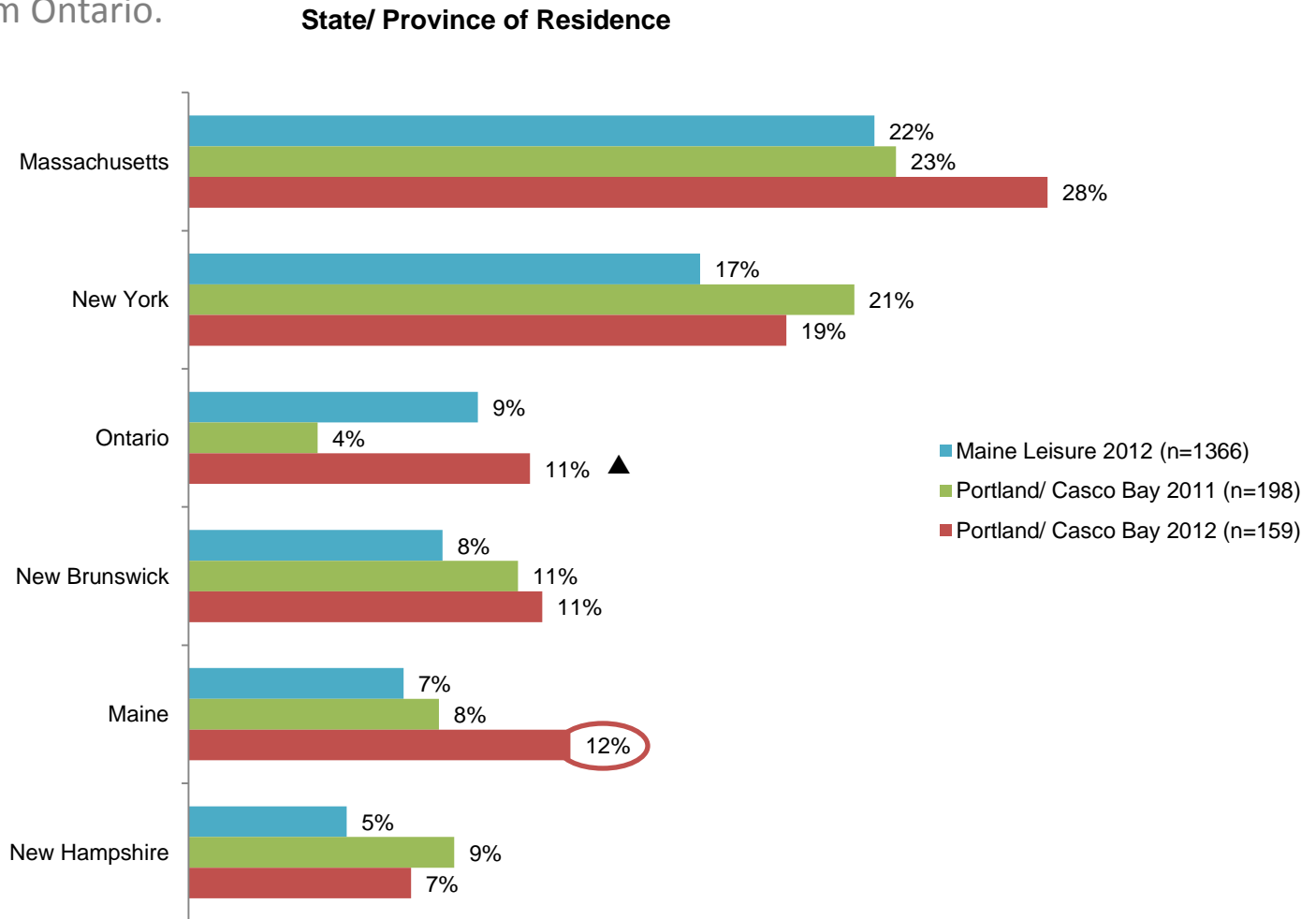
| Overnight, Leisure Visitors | Maine Leisure 2012 (n=1366) | Greater Portland & Casco Bay 2011 (n=198) | Greater Portland & Casco Bay 2012 (n=159) |
|-----------------------------|-----------------------------|---|---|
| Age: | | | |
| < 35 | 22%▼ | 27% | 28% |
| 35 - 44 | 17% | 16% | 13% |
| 45 - 54 | 22% | 17% | 23% |
| 55 + | 39%▲ | 40% | 35% |
| Mean Age (Years) | 48.7 | 47.3 | 47.6 |
| Income: | | | |
| < \$50,000 | 10% | 12% | 8% |
| \$50,000 - \$99,000 | 32% | 34% | 26% |
| \$100,000 + | 43% | 42% | 54%▲ |
| Mean Income (Thousands) | \$113.47 | \$112.09 | \$119.46 |
| Female | 49%▼ | 55% | 51% |
| College Degree or Higher | 79%▲ | 81% | 89%▲ |
| Married | 63% | 59% | 64% |
| Employed Full Time | 60% | 66% | 65% |

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Overnight Leisure Visitor Residence

- Massachusetts and New York are the top areas of residence for overnight leisure visitors to the Greater Portland & Casco Bay region. In-state travelers and Canadian visitors from Ontario and New Brunswick also supply a solid proportion of visitors to this region of Maine.
- The only statistically significant increase seen since 2011 is in the proportion of visitors coming from Ontario.



State/Province of residence.

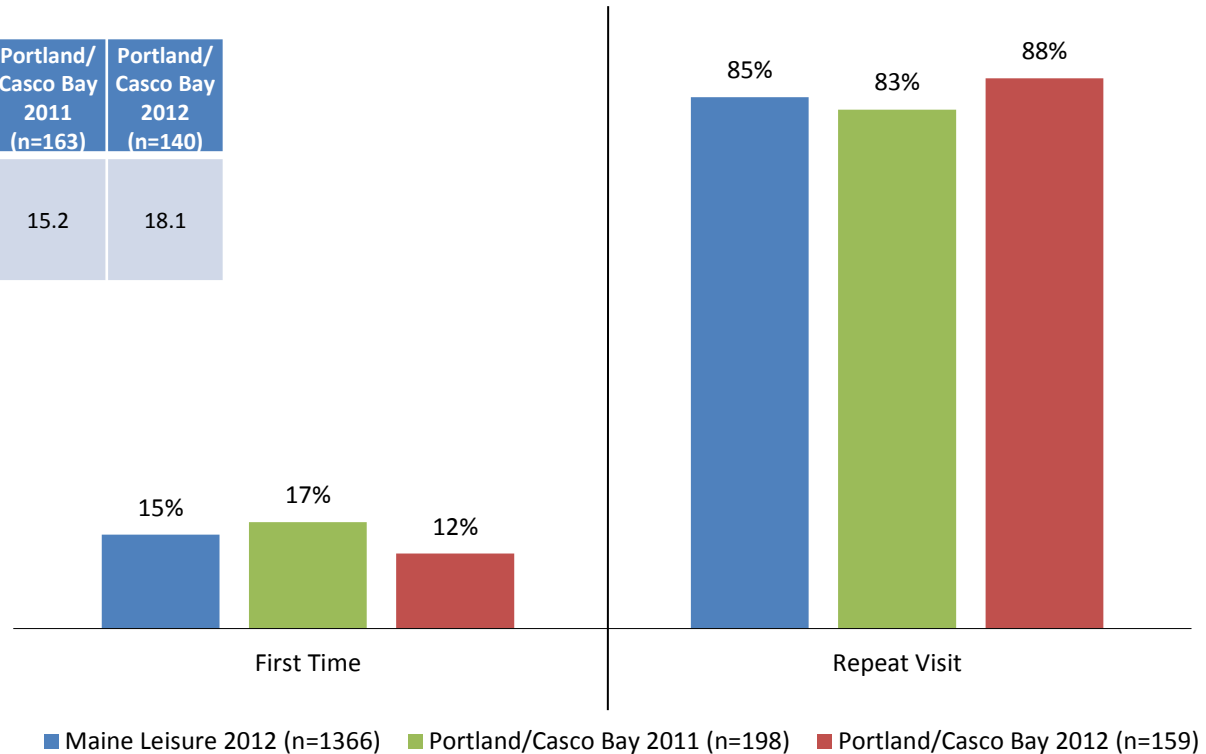
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First-Time vs. Repeat Visitors

- The Greater Portland & Casco Bay region attracted a similar proportion of first-time overnight leisure visitors in 2012 as the rest of Maine.

| Repeat Overnight Leisure Visitors | NET 2012 (n=1159) | Portland/Casco Bay 2011 (n=163) | Portland/Casco Bay 2012 (n=140) |
|--|-------------------|---------------------------------|---------------------------------|
| Average number of trips to Maine in past 5 years | 13.5 | 15.2 | 18.1 |



Regional Q9. Was this your first visit in Maine?

Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

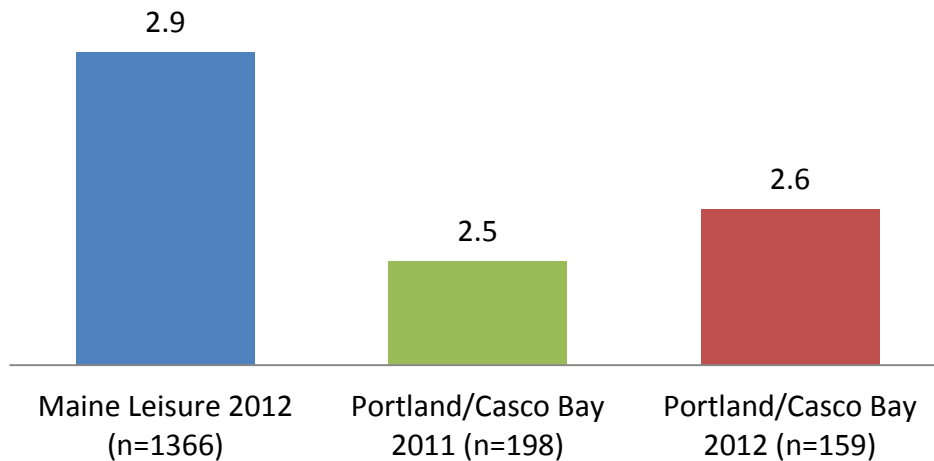
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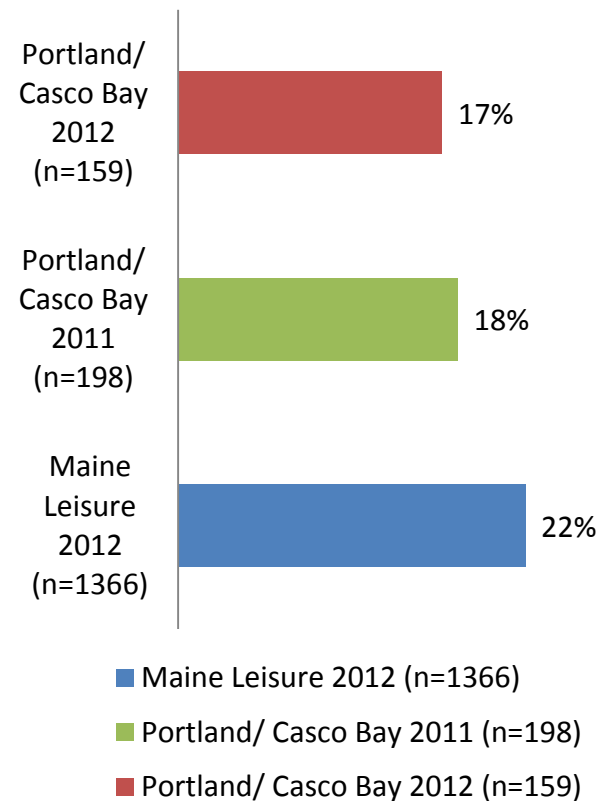
Party Size and Composition

- On average, overnight leisure visitors to the Greater Portland & Casco Bay region were just as likely to be traveling with children than were visitors to the rest of the State of Maine, with about one-fifth bringing children along on their trip to Maine.

Average Number of People in Travel Party



Percent Traveling with Children



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

Regional Q25. How many of these people were: Children?

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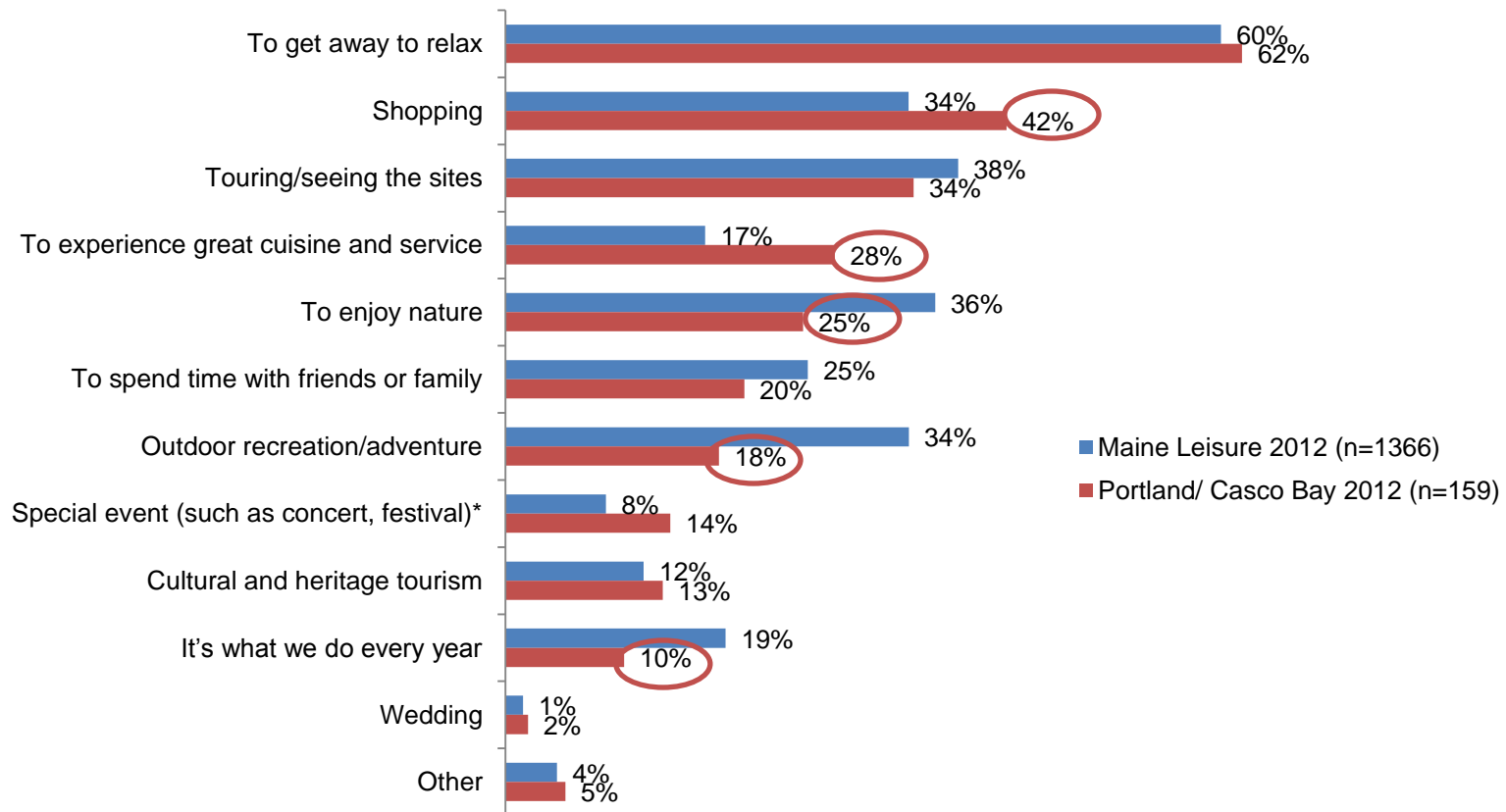
Overnight Leisure Visitors: *Trip Experience*



Primary Purpose of Overnight Leisure Trips

- Almost two-thirds of overnight leisure visitors to Greater Portland reported that the primary purpose of their visit was to *get away to relax*, similar to overnight visitors to the State of Maine as a whole. *Shopping* was the next highest reason for visiting.
- Visitors to the Greater Portland & Casco Bay region were more likely than those to the rest of the State to list *shopping* and *to experience great cuisine and service* as the primary purpose of their trip.

Primary Purpose of Overnight Leisure Trips



Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?

*Includes Wedding before 06/2012. Due to a revision to response options in 2012, direct comparisons between 2011 and 2012 data cannot be made.

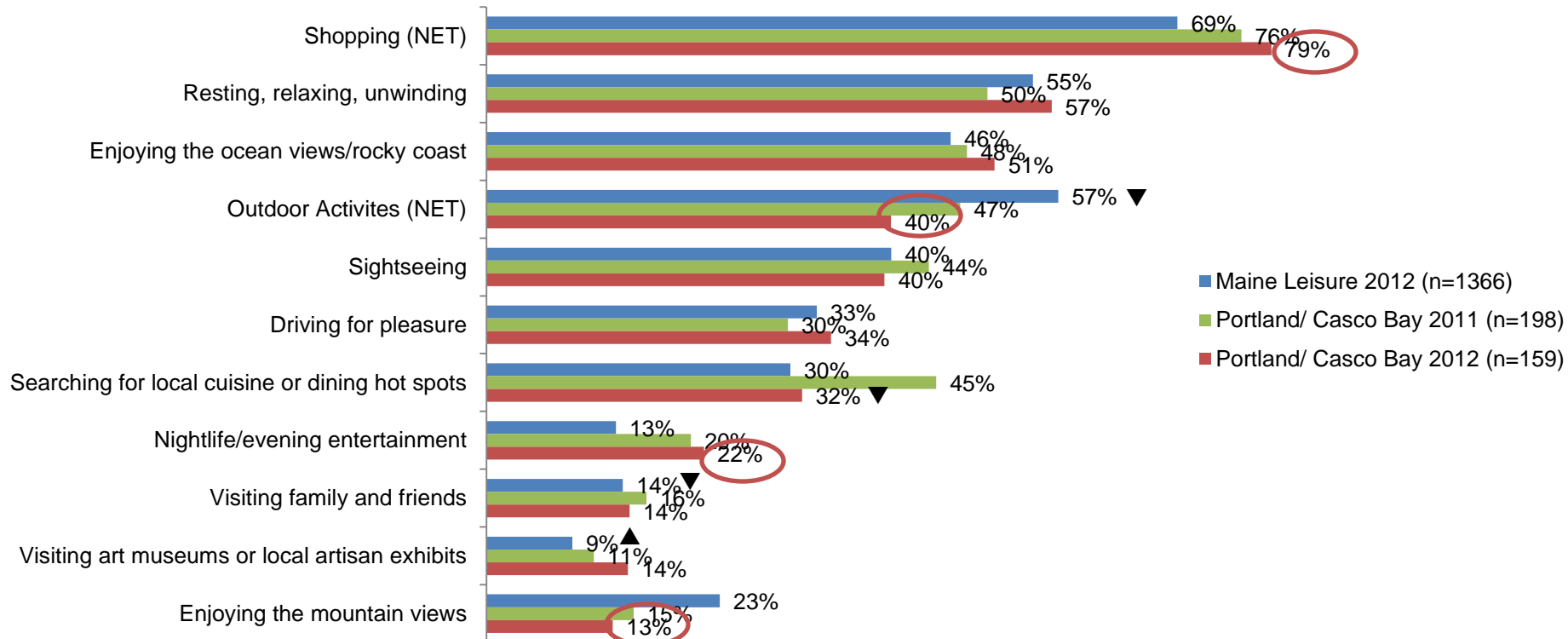
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Overnight Leisure Trip Activities

- Consistent with trip purpose, the most widely cited activities in Greater Portland include *shopping* and *resting/relaxing/unwinding*. Visitors to the Greater Portland region are more likely to have been shopping while in Maine than visitors to all of Maine, likely a reflection of the wide spectrum of shopping available in this region (Freeport, the Old Port, and the Maine Mall).

Top Trip Activities

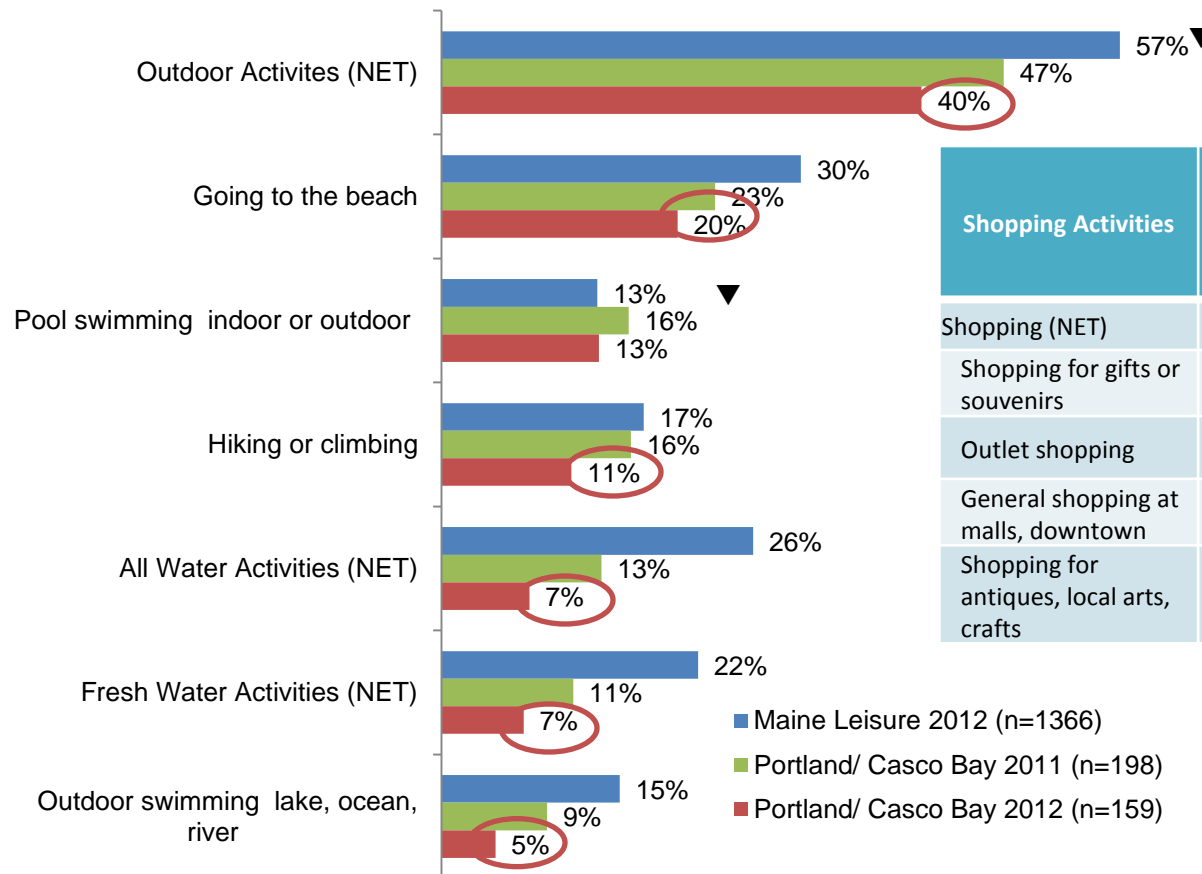


Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)
 ▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.
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Overnight Leisure Outdoor and Shopping Activities

- The most popular outdoor activity among overnight leisure visitors to the Greater Portland and Casco Bay region in 2012 was to go to the beach. Overall, outdoor activities were less popular in this region than in the rest of the State of Maine, while shopping was more popular.

Top Outdoor Activities

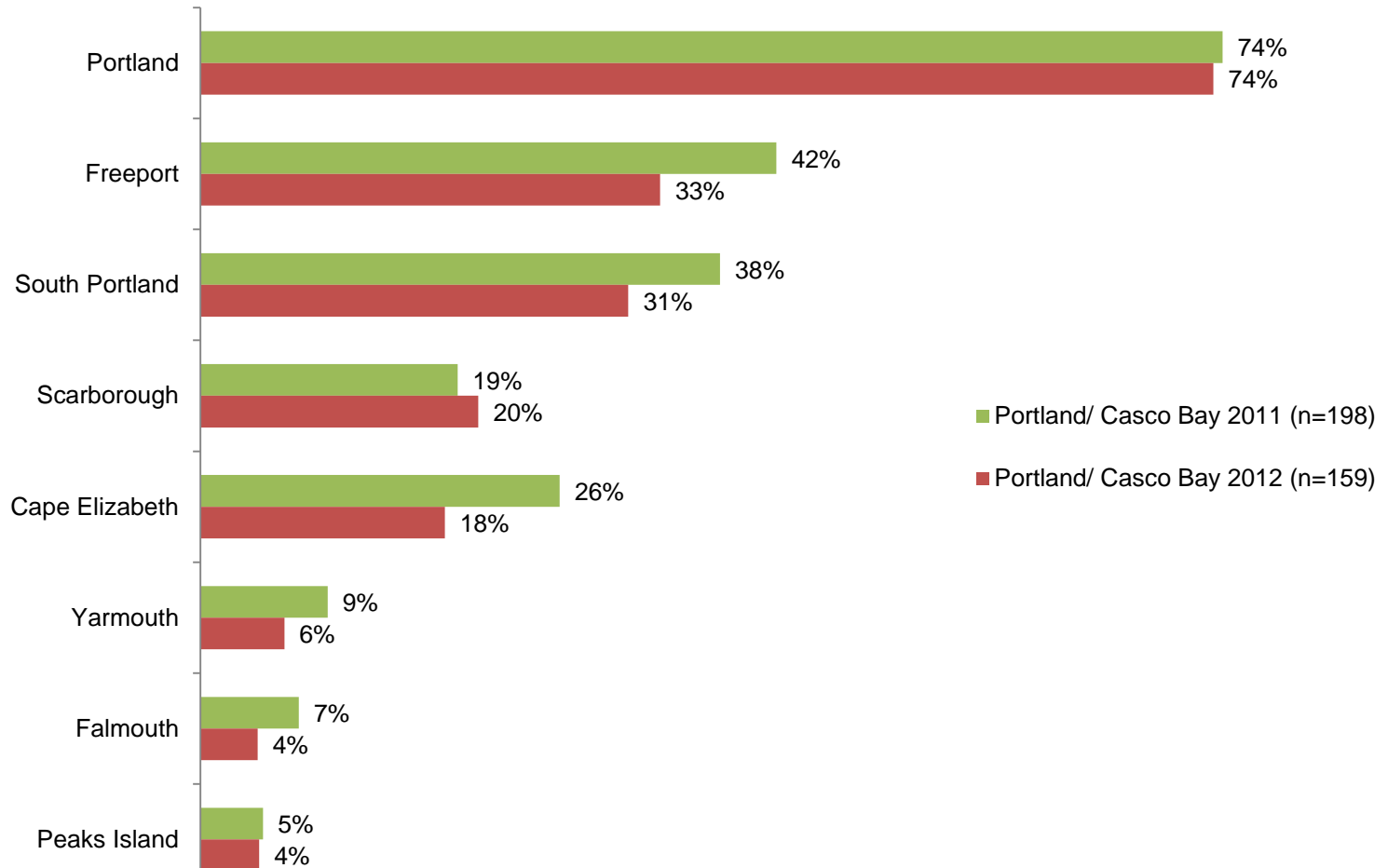


| Shopping Activities | Maine Leisure 2012 (n=1366) | Portland/ Casco Bay 2011 (n=198) | Portland/ Casco Bay 2012 (n=159) |
|---|-----------------------------|----------------------------------|----------------------------------|
| Shopping (NET) | 69% | 76% | 79% |
| Shopping for gifts or souvenirs | 33% ▼ | 39% | 37% |
| Outlet shopping | 36% | 42% | 42% |
| General shopping at malls, downtown | 31% | 44% | 38% |
| Shopping for antiques, local arts, crafts | 20% | 19% | 23% |

Towns & Cities Visited

- Three-fourths of overnight leisure visitors to the Greater Portland region spent time in Portland, more than twice as many as the next most frequently visited towns (Freeport and South Portland). Visitation to Freeport was highest during the Fall season.

Top Towns & Cities Visited



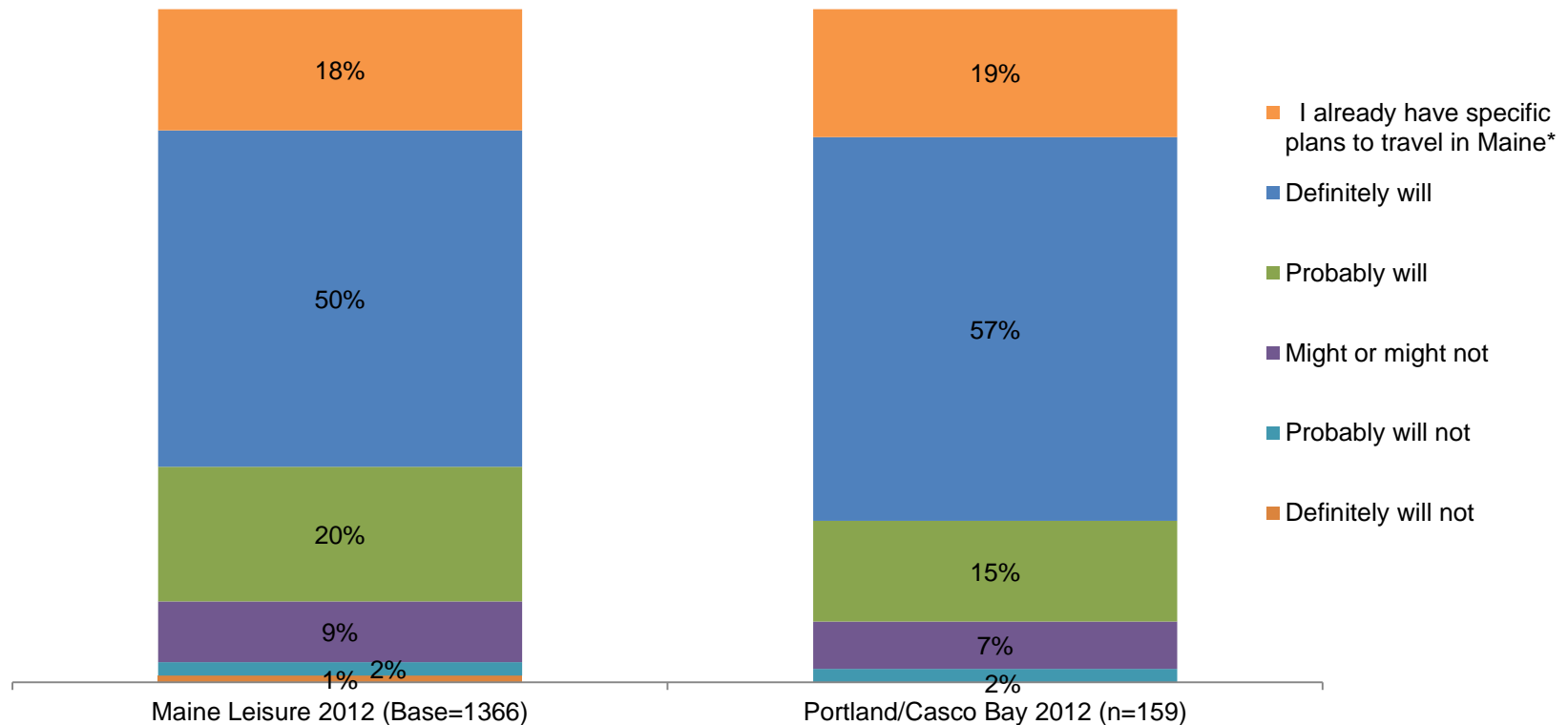
Regional Q31: Within the region you visited, what specific towns or cities did you visit?

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

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Future Travel Likelihood

- Three-fourths of overnight leisure visitors to the Greater Portland region indicated that they *definitely would travel to Maine in the next two years or already had specific plans to do so*. This is a greater proportion than among those who responded similarly among visitors to the State of Maine as a whole.



Regional Q37. How likely will you be to travel in Maine in the next two years?

*Added in Summer 2012. Due to a revision to response options and question wording in 2012, direct comparisons between 2011 and 2012 data cannot be made.

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Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Day Leisure Visitors: *Traveler Description*



Day Leisure Visitor Demographics

- There were no significant year-over-year increases among the demographics of leisure day visitors to Greater Portland & Casco Bay and no differences when compared to leisure day visitors to Maine as a whole.

| Day, Leisure Visitors | Maine Leisure 2012 (n=803) | Portland/ Casco Bay 2011 (n=170) | Portland/ Casco Bay 2012 (n=124) |
|--------------------------|----------------------------|----------------------------------|----------------------------------|
| Age: | | | |
| < 35 | 19%▼ | 30% | 26% |
| 35 - 44 | 17% | 14% | 15% |
| 45 - 54 | 22% | 20% | 22% |
| 55 + | 41% | 36% | 37% |
| Mean Age (Years) | 49.0▲ | 45.7 | 47.3 |
| Income: | | | |
| < \$50,000 | 15% | 22% | 18% |
| \$50,000 - \$99,000 | 44% | 43% | 39% |
| \$100,000 + | 41% | 35% | 42% |
| Mean Income (Thousands) | \$101.11▲ | \$ 93.19 | \$ 100.33 |
| Female | 47% | 60% | 51% |
| College Degree or Higher | 72% | 72% | 67% |
| Married | 64% | 61% | 66% |
| Employed Full Time | 60% | 64% | 60% |

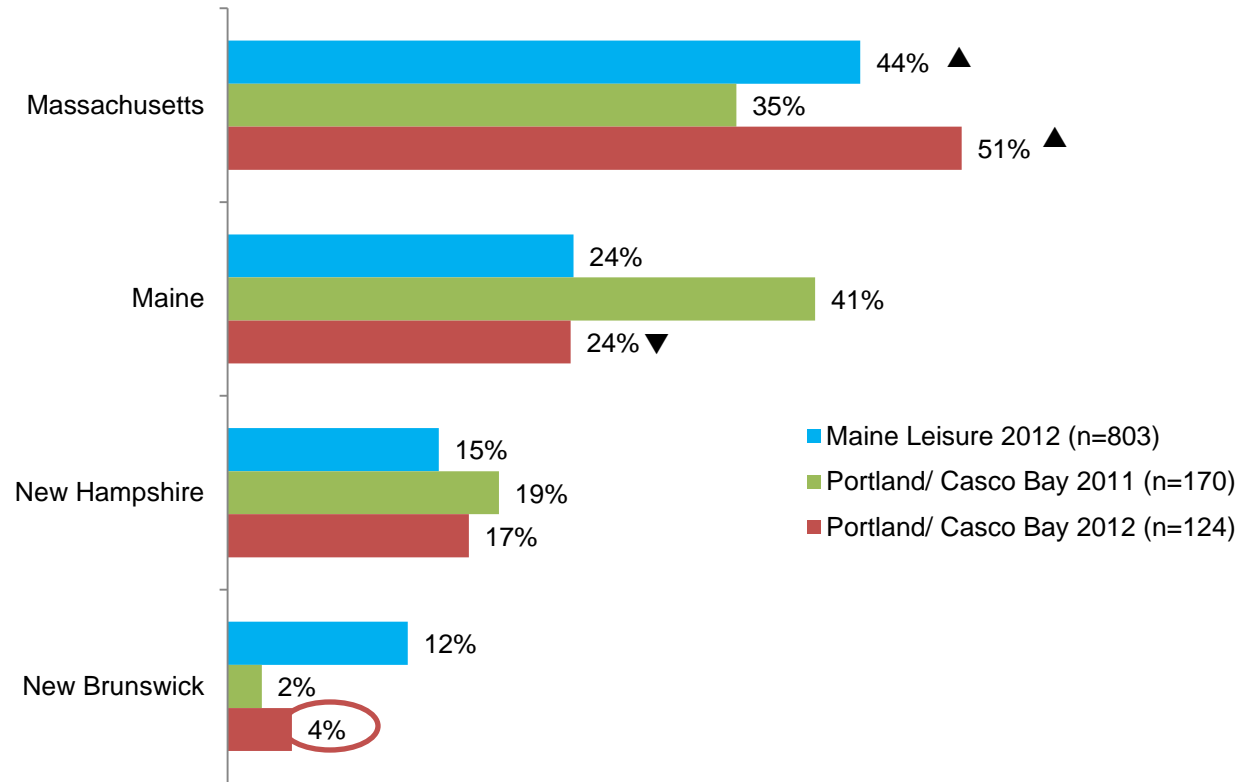
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Day Leisure Visitor Residence

- Showing a shift from 2011, half of 2012's day leisure visitors to the Greater Portland & Casco -Bay region are from Massachusetts, while one-fourth are in-state visitors. *This shift should be viewed with caution, as the sample size of day leisure visitors is relatively small.*
- In 2011, Maine supplied the largest proportion of day visitors to this region, with Massachusetts providing the second largest proportion.

State/ Province of Residence



Day Q1A. In what State or Province do you currently reside?

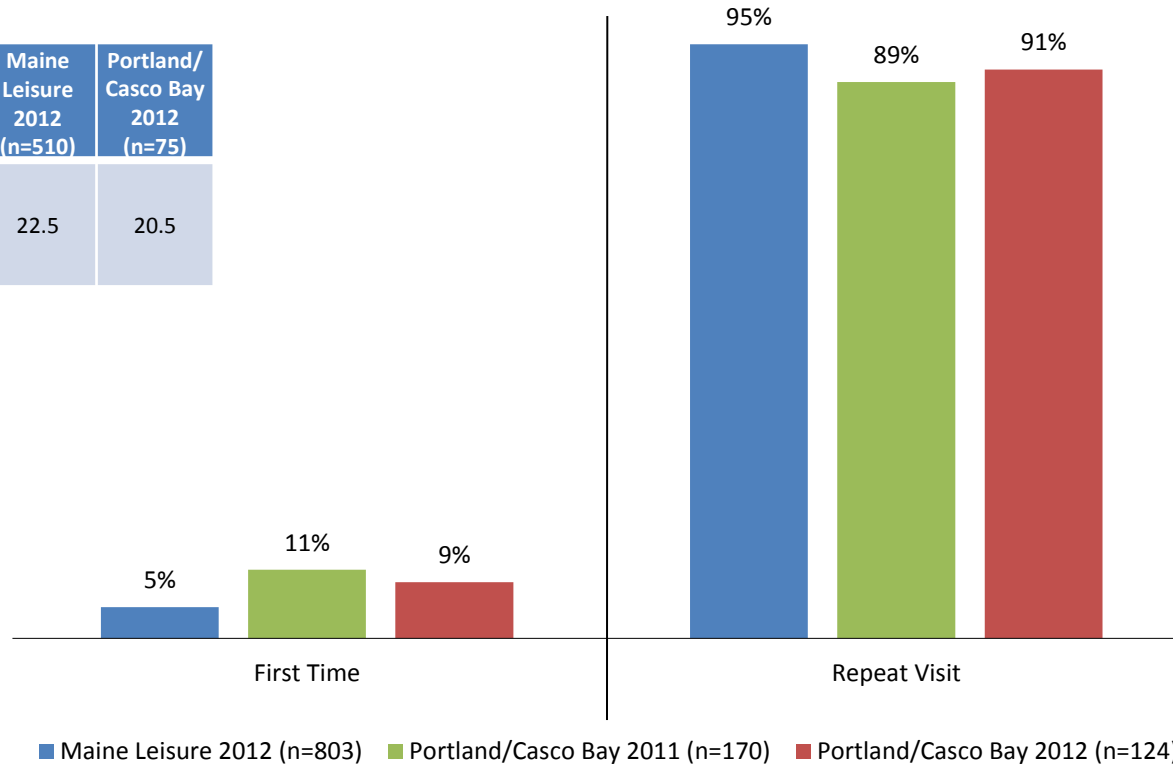
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First-Time vs. Repeat Visitors

- One in ten day leisure visitors to the Greater Portland & Casco Bay region in 2012 were first-time visitors, comparable to the corresponding proportion for the State of Maine as a whole.

| Repeat Leisure Day Visitors | Maine Leisure 2012 (n=510) | Portland/Casco Bay 2012 (n=75) |
|--|----------------------------|--------------------------------|
| Average number of trips to Maine in past 5 years | 22.5 | 20.5 |



Day Q4. Was this your first trip to Maine?

Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

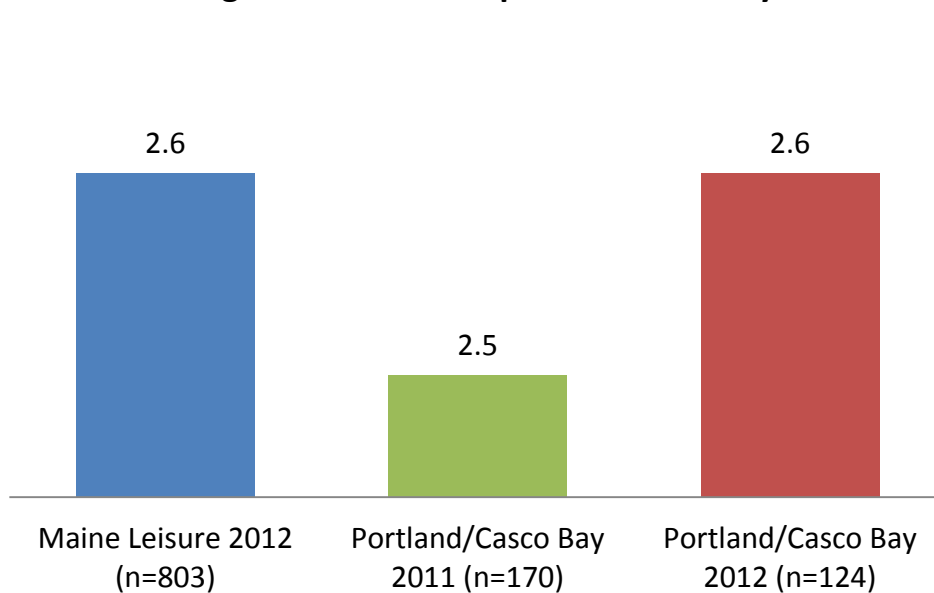
▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

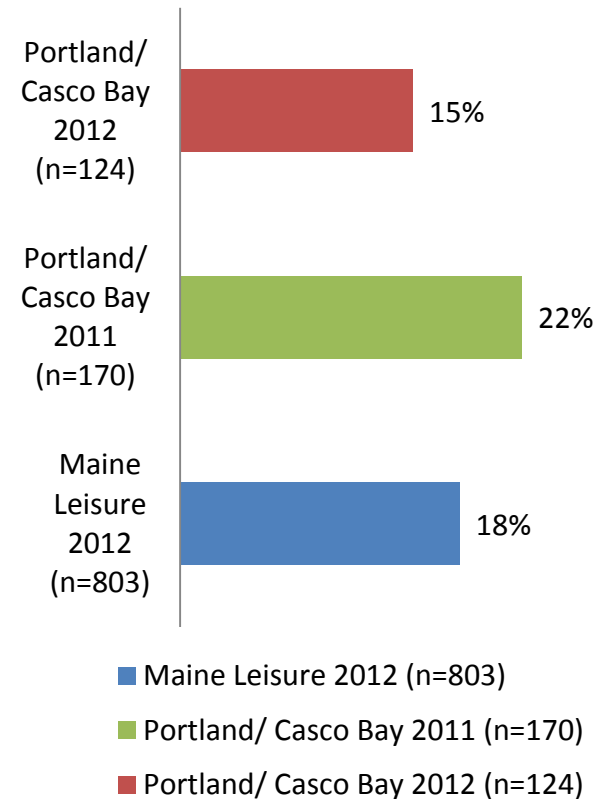
Party Size and Composition

- Fifteen percent of day leisure visitors to the Greater Portland region in 2012 were traveling with children. Travel parties averaged 2.6 people.

Average Number of People in Travel Party



Percent Traveling with Children



Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q8. How many of these people were: Children

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

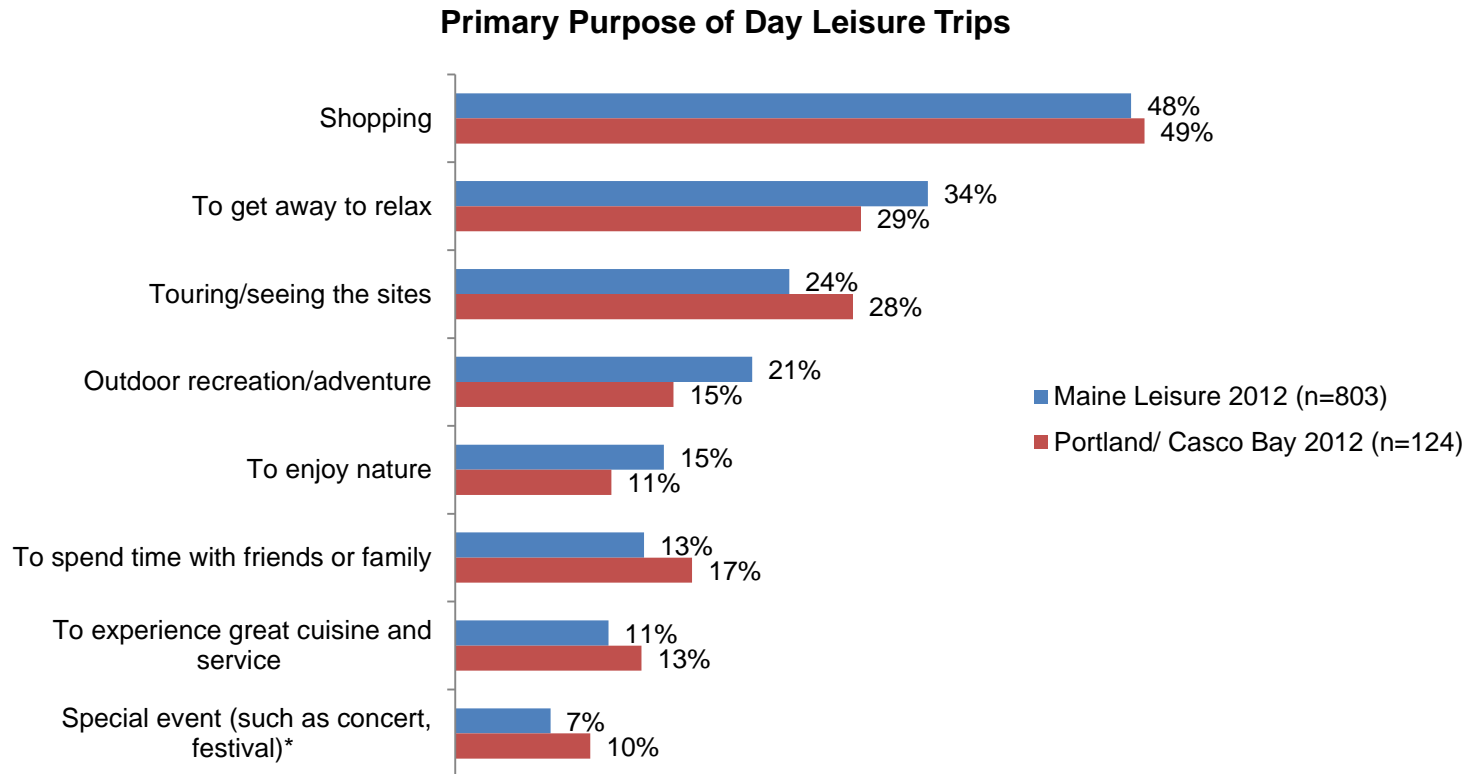
Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Day Leisure Visitors: *Trip Description*



Primary Purpose of Day Leisure Trips

- Similar to Greater Portland's overnight visitors, *shopping* remains the top primary trip purpose of leisure day trips to Greater Portland.



Day Q3. What was the primary purpose of your most recent leisure trip in Maine?

*Includes Wedding before 06/2012. Due to a revision to response options in 2012, direct comparisons between 2011 and 2012 data cannot be made.

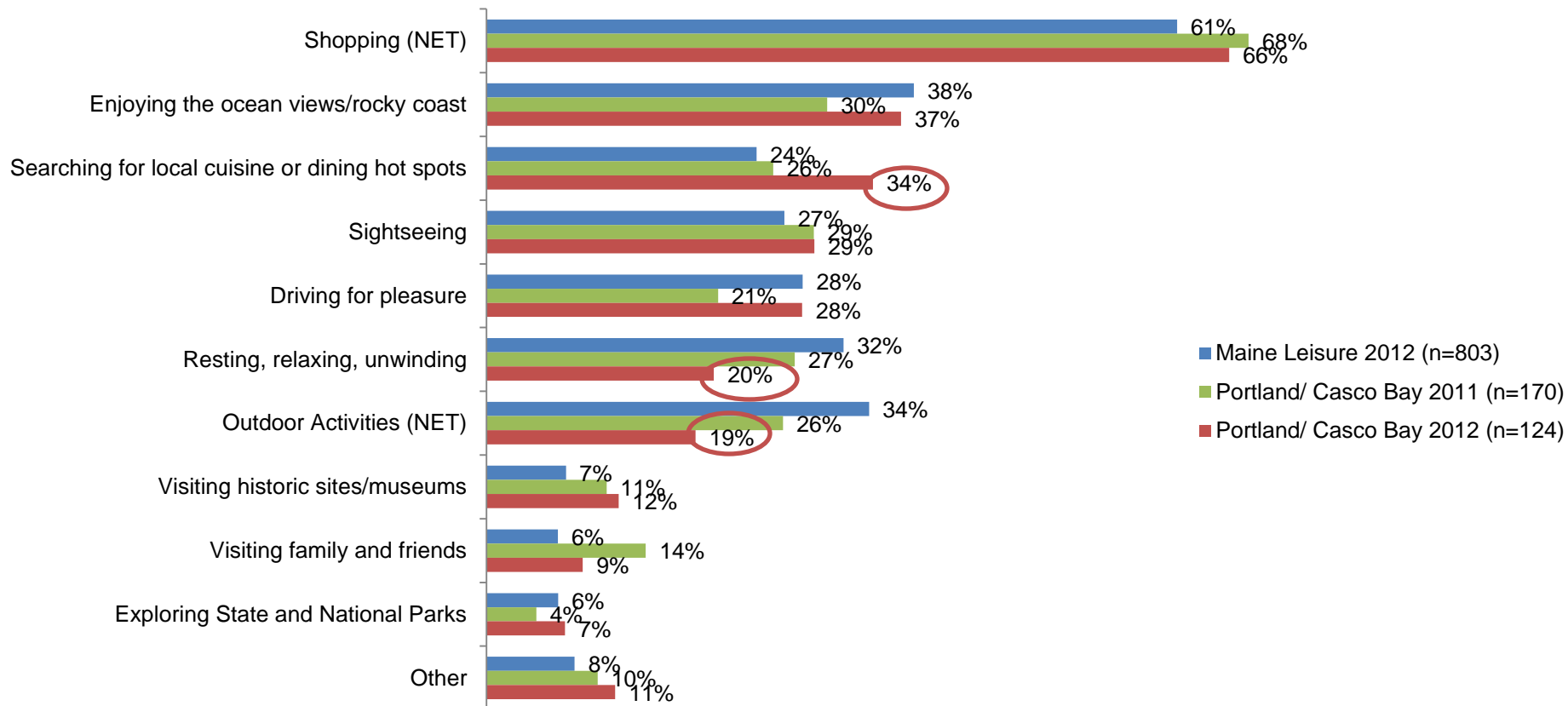
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Day Leisure Trip Activities

- *Shopping* was the most widely cited trip activity among leisure day visitors to Greater Portland in 2012. Secondarily, visitors *enjoyed the ocean views and searching for local cuisine*.

Top Trip Activities



Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).

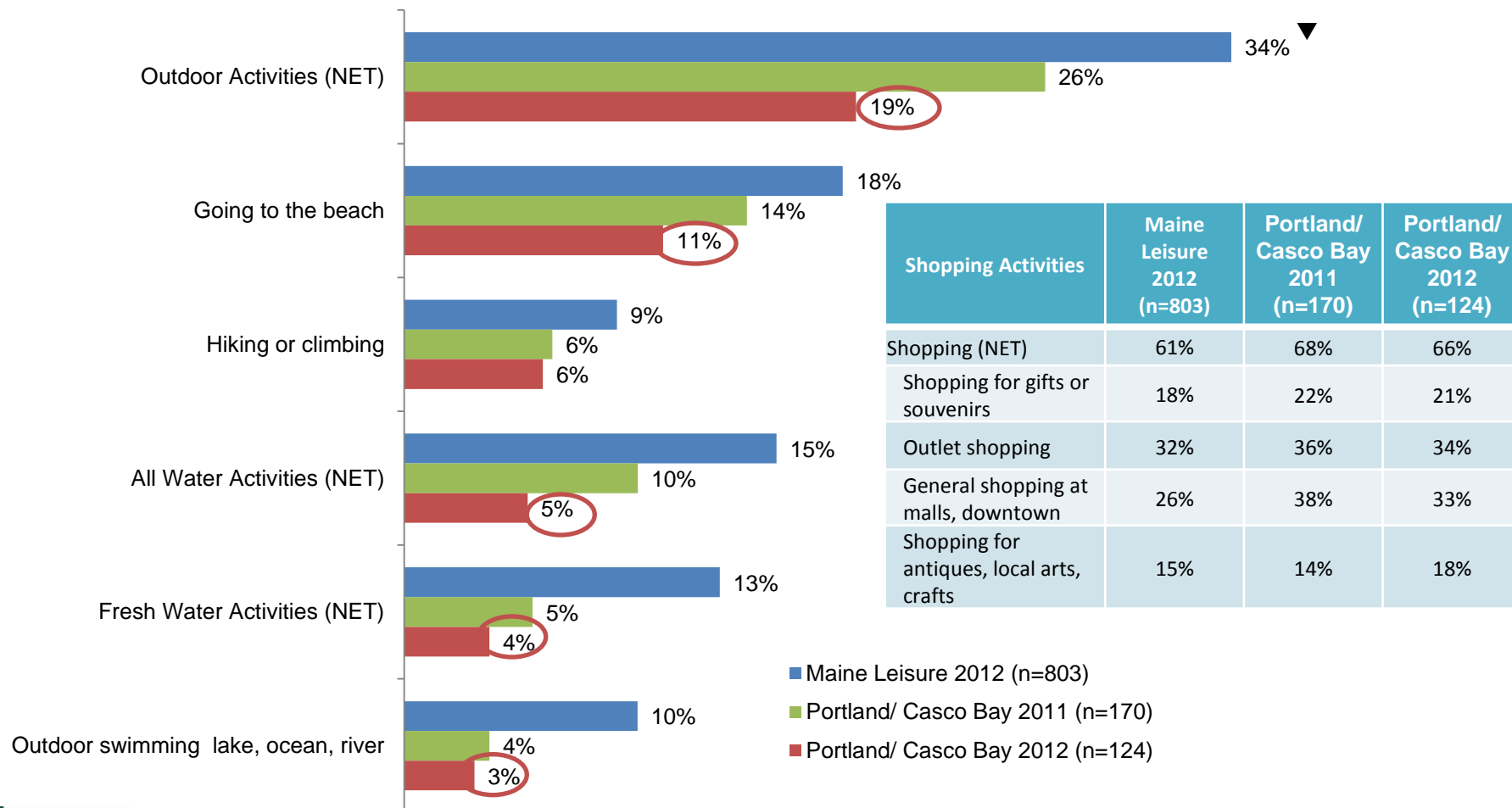
▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Day Leisure Outdoor Trip Activities

- There were no significant changes between 2011 and 2012 in the outdoor activities enjoyed by day visitors to the Greater Portland region. Outdoor activities in general, though, were less popular in this region than throughout Maine as a whole - specifically, going to the beach and other water activities.

Top Outdoor Activities



| Shopping Activities | Maine Leisure 2012 (n=803) | Portland/ Casco Bay 2011 (n=170) | Portland/ Casco Bay 2012 (n=124) |
|---|----------------------------|----------------------------------|----------------------------------|
| Shopping (NET) | 61% | 68% | 66% |
| Shopping for gifts or souvenirs | 18% | 22% | 21% |
| Outlet shopping | 32% | 36% | 34% |
| General shopping at malls, downtown | 26% | 38% | 33% |
| Shopping for antiques, local arts, crafts | 15% | 14% | 18% |

Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).

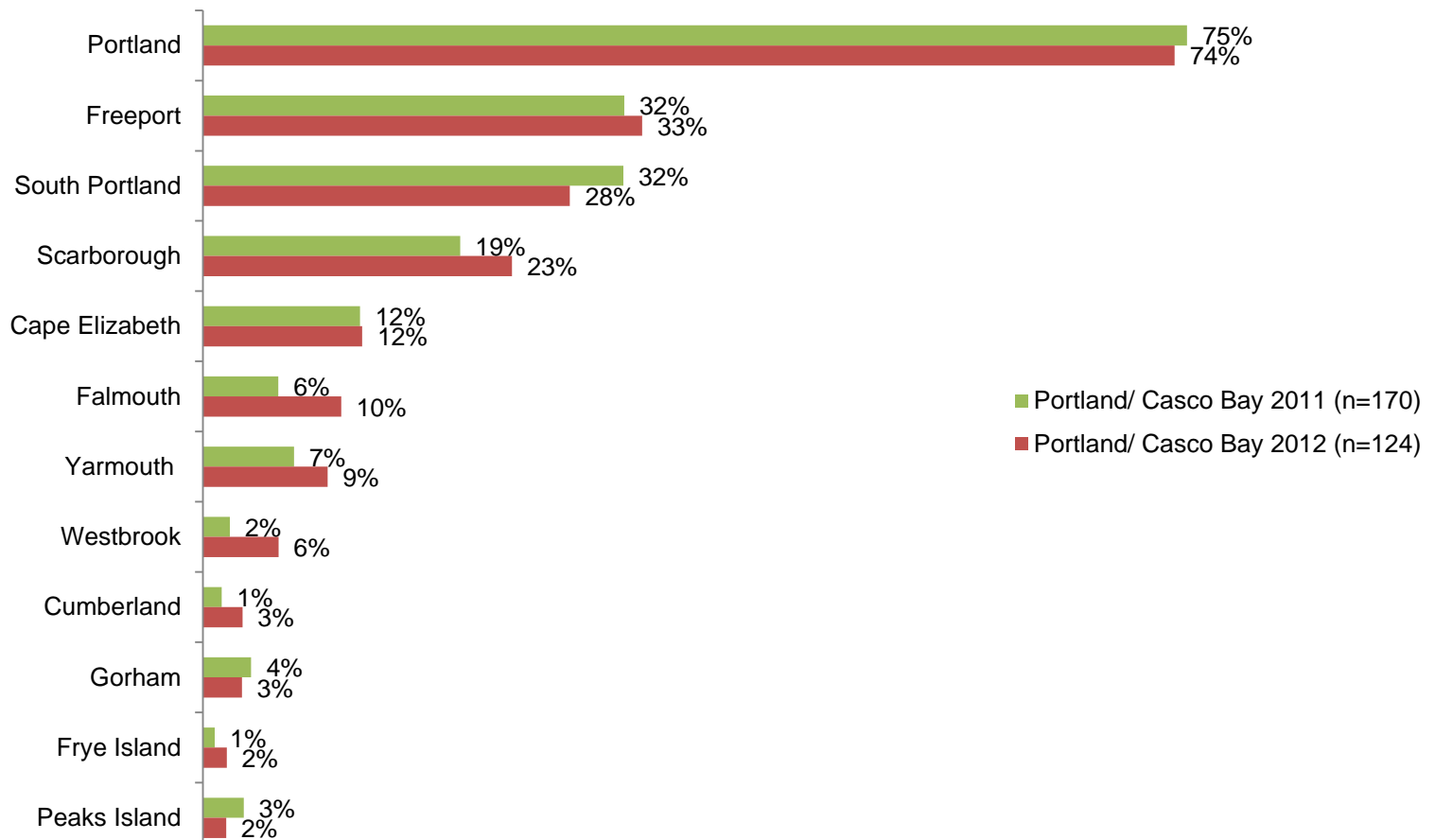
▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

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Towns & Cities Visited

- Following the visitation pattern seen among overnight leisure visitors to the Greater Portland region, three-fourths of day visitors to the region spent time in Portland, more than twice as many as the next most frequently visited towns (Freeport and South Portland). Among day visitors, visitation to Portland was highest during the Fall season.

Top Towns/ Cities Visited



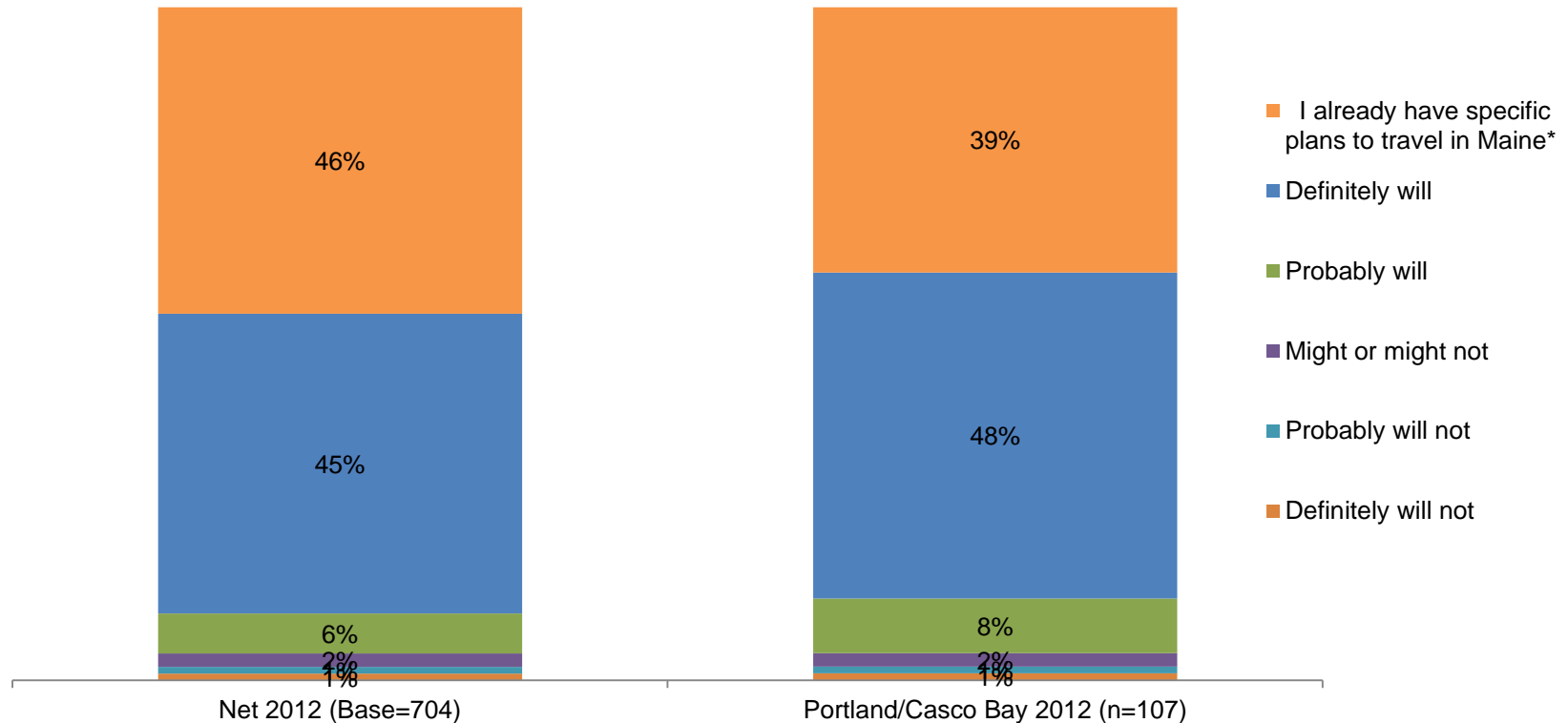
Day Q12: Within the region, what specific towns or cities did you visit?

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Future Travel Likelihood

- Nearly nine in ten day leisure visitors to the Greater Portland region indicated that they *definitely would travel to Maine in the next two years (48%) or already had specific plans to do so (39%)*. This is comparable to the proportion who responded similarly among visitors to the State of Maine as a whole.



Day Q19. How likely will you be to take a day trip in Maine in the next two years?

*Added in Summer 2012. Due to a revision to response options and question wording in 2012, direct comparisons between 2011 and 2012 data cannot be made.

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Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Comparison of *Greater Portland & Casco Bay* Visitors to Maine Visitors



Comparisons

- Visitors to the Greater Portland and Casco Bay region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in some visitor demographics, their reasons for traveling, and the activities they participate in while visiting.
- Overnight visitor demographics portray a well-educated and more affluent traveler. Popular trip activities and stated purpose of trips closely follow the many shopping and dining experiences available in the Greater Portland region and a more “urban” experience.
- Highlights:
 - **Visitor Origin**
 - **A greater proportion** of overnight visitors from **Maine**
 - **A lesser proportion** of day visitors from **New Brunswick**
 - **Visitor Demographics**
 - Overnight visitors **more likely to have a college degree** and **earn more than \$100,000 per year.**

Comparisons Continued

- Highlights Continued:
 - **Primary Purpose of Trip**
 - Overnight visitors **more** likely to be traveling to **experience great cuisine** and for **the shopping**.
 - Overnight visitors **less** likely to be visiting to **enjoy nature** and participate in **outdoor recreation activities**.
 - **Trip Activities – Overnight Visitors**
 - **More** likely to be:
 - Shopping
 - Enjoying nightlife and evening entertainment
 - **Less** likely to be:
 - Enjoying the mountain views
 - Participating in outdoor activities
 - **Trip Activities – Day Visitors**
 - **More** likely to be:
 - Searching for local cuisine or dining hot spots
 - **Less** likely to be:
 - Resting/relaxing/unwinding
 - Participating in outdoor activities



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