

Maine Office of Tourism Visitor Tracking Research 2014 Calendar Year Annual Report

Regional Insights: The Maine Beaches

Prepared by



May 2015

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Research Objectives and Methodology

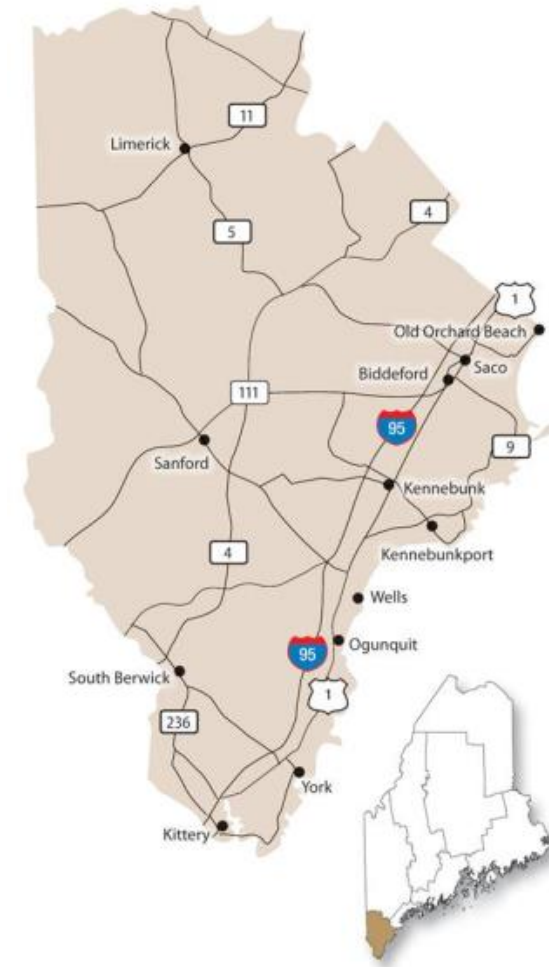


Research Objectives and Methodology

- 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 two national online panels – Research Now and Instantly (formerly Usamp).
- Information is gathered on an ongoing basis through three surveys:
 - **Maine Overnight Visitor Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada
 - Have taken an overnight trip to Maine in the past four weeks
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders
 - 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
 - To determine the incidence of travel nationwide and Maine’s share of that travel
- Survey results were collected during calendar year 2014 for travel to Maine occurring from December 2013 through November 2014. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,930
 - Maine Day Visitor – 1,733
 - National Omnibus Survey – 17,675

Research Objectives and Methodology

- The following report summarizes results among visitors to the Maine Beaches tourism region during 2014, including:
 - 694 overnight visitors, and
 - 613 day visitors.
- Throughout this report, data for the Maine Beaches tourism region will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by < >.
- Statistically significant differences between 2013 and 2014 are also highlighted for both the Maine Beaches region and the State of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.



Overnight Visitors: *Traveler Description*



Overnight Visitor Demographics

- Overnight visitors to the Maine Beaches tourism region are about 48 years old, on average, and have annual household incomes that average just over \$106,000. Three-fourths have at least a college degree and nearly two-thirds are married. Fifty-seven percent are employed full-time.
- Overnight visitors to the Maine Beaches are older on average than visitors to Maine overall and less likely to be employed full-time.

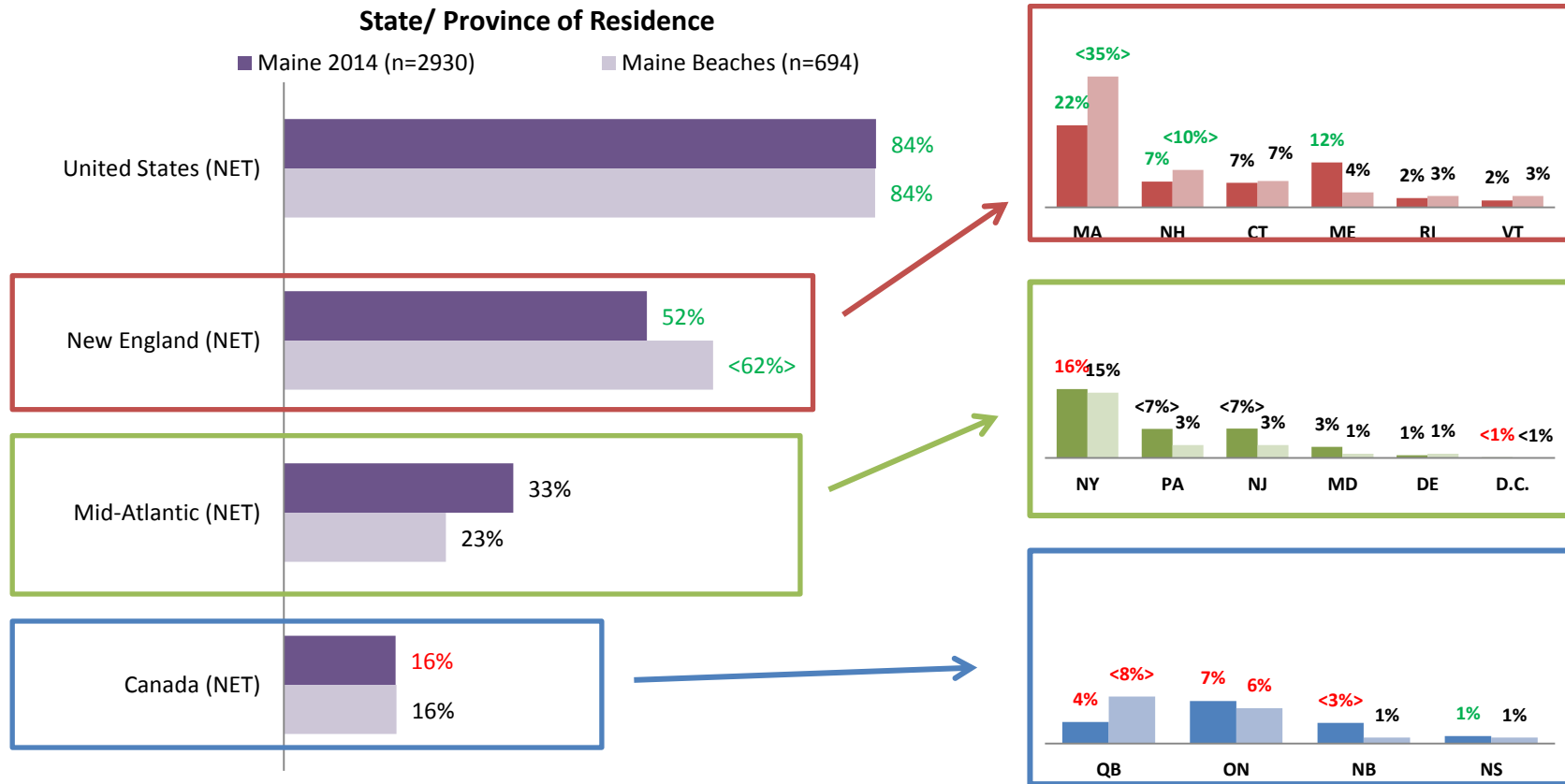
Overnight Visitors	Maine 2014 (n=2930)	Maine Beaches 2014 (n=694)
Age:		
< 35	29%	23%
35 - 44	19%	16%
45 - 54	20%	20%
55 +	32%	<42%>
Mean Age (Years)	45.4	<48.3>
Income:		
< \$50,000	16%	17%
\$50,000 - \$99,999	40%	40%
\$100,000 +	44%	44%
Mean Income (Thousands)	\$106,260	\$106,540
Female	54%	<59%>
College Degree or Higher	74%	73%
Married	66%	63%
Employed Full Time	<62%>	57%

<> indicates a significant difference between subgroups at the 95% confidence level.

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

Massachusetts supplies one in three visitors to the Maine Beaches, the highest proportion of any state or province.

- The Maine Beaches region attracts a higher proportion of overnight visitors from New England than does the State of Maine as a whole, specifically from Massachusetts and New Hampshire.



State/ Province of Residence

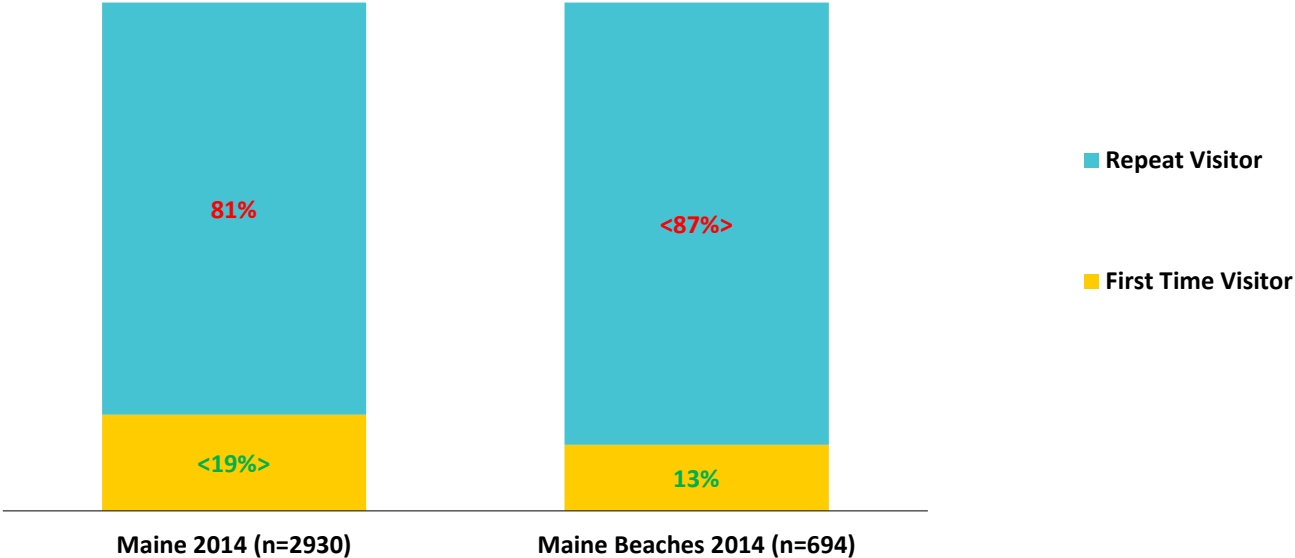
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Most overnight visitors to the Maine Beaches are repeat Maine visitors.

- The Maine Beaches attracts a higher proportion of repeat visitors than the State of Maine as a whole.

Repeat vs. First Time Visitors

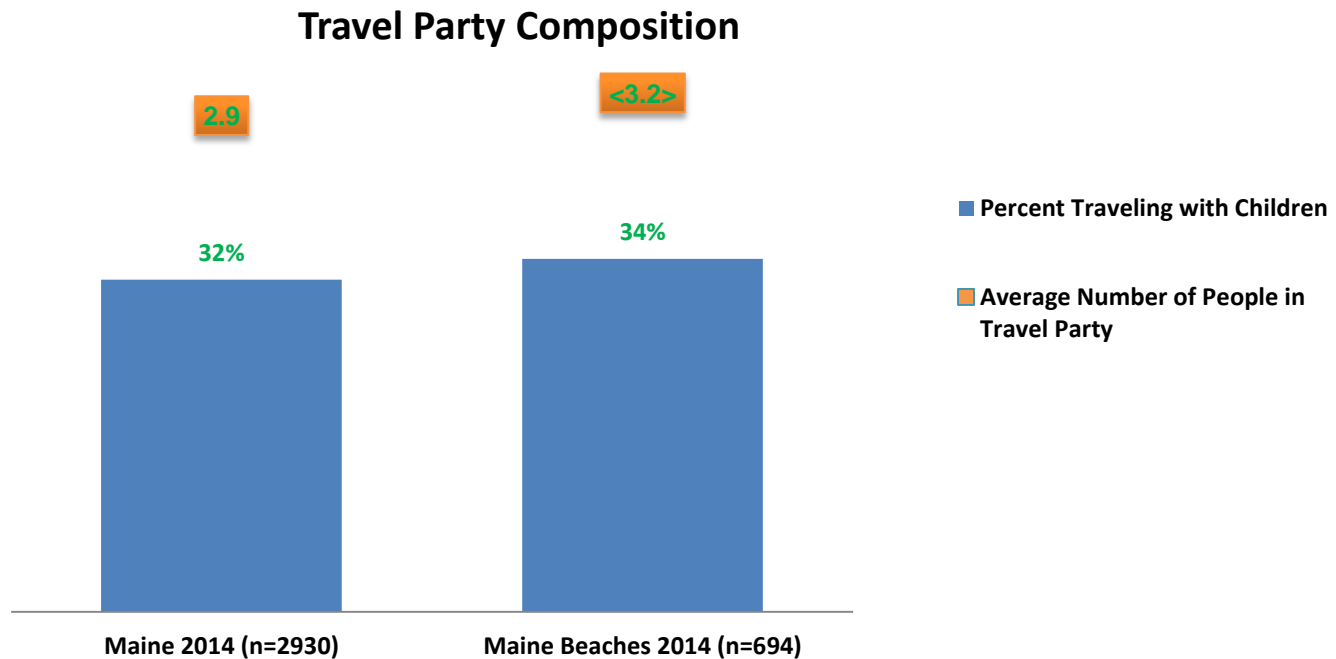


Q11. Was this your first visit in Maine?

Q12. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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

Overnight visitors to the Maine Beaches travel in parties of three on average, and one-third have children with them.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q19. How many of these people were: Children?

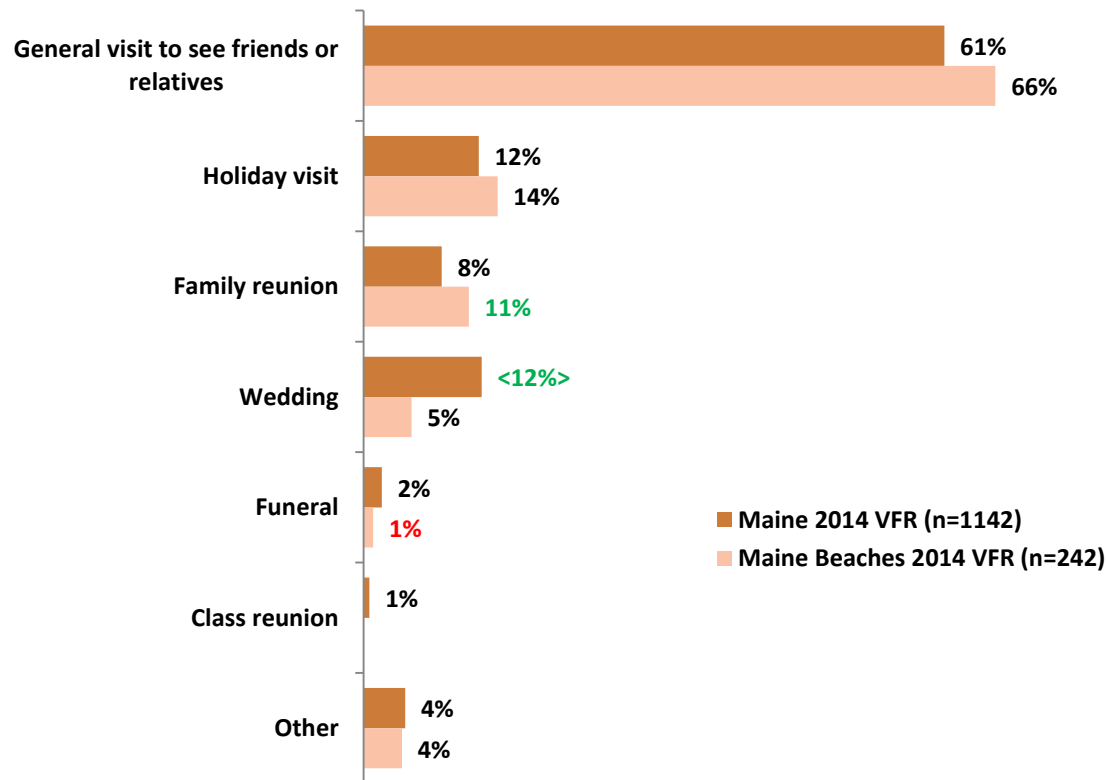
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



Among overnight VFR travelers to the Maine Beaches, the primary trip purpose is a *general visit to see friends or relatives*.

Primary Purpose of Overnight VFR Trips



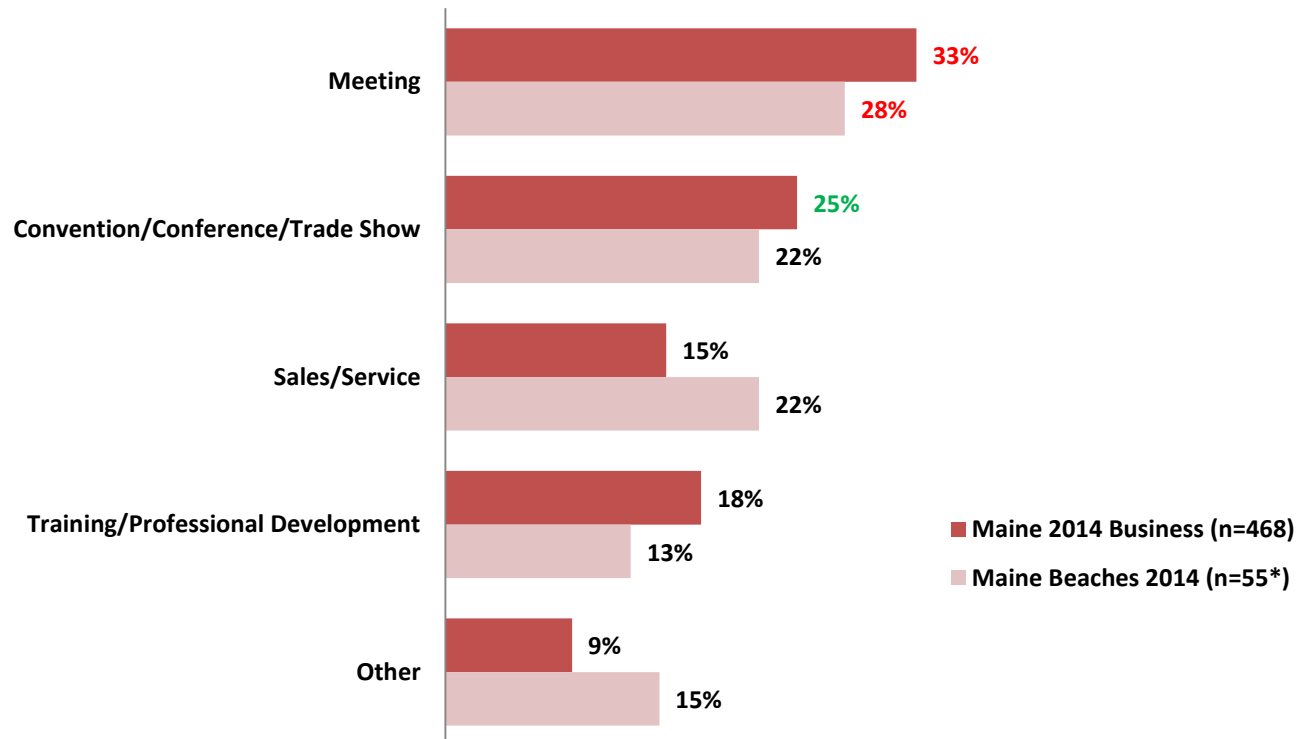
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> indicates a significant difference between subgroups at the 95% confidence level.

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

Overnight business travelers most often visit the Maine Beaches for a *general meeting*, followed by a *convention/conference/trade show*.

Primary Purpose of Overnight Business Trips



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

<> indicates a significant difference between subgroups at the 95% confidence level.

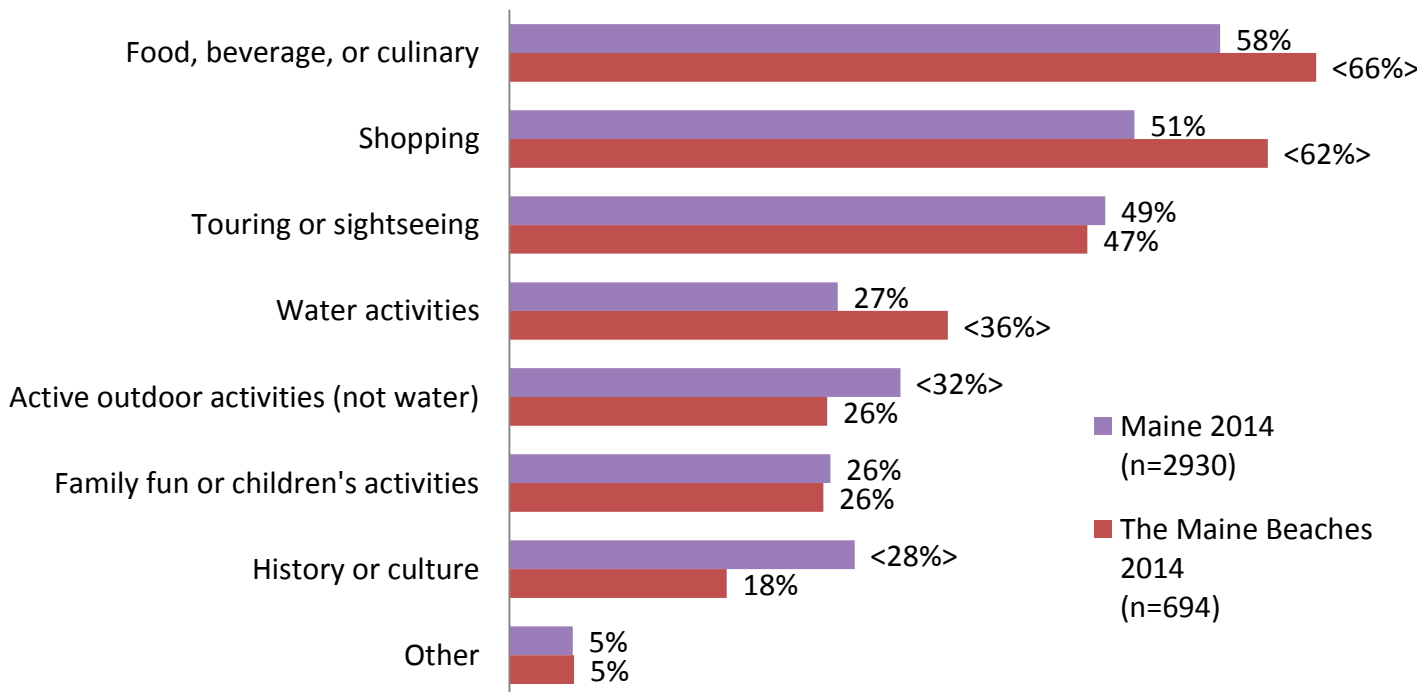
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

**Please note small sample size.*

Food/beverage/culinary and shopping are the top interest areas among overnight visitors to the Maine Beaches region.

- Maine Beaches visitors differ from overnight visitors to the State of Maine as a whole in the interest areas they wanted to pursue on their trip to Maine. *Food/beverage/culinary* interests, *shopping*, and *water activities* are all more popular among overnight visitors to the Maine Beaches region, while *active outdoor activities* and *history/culture activities* are less popular.

2014 Interest Areas*



Most Important Interest Area The Maine Beaches	
Food, beverage, or culinary	38%
Shopping	17%
Touring or sightseeing	48%
Water activities	43%
Active outdoor activities (not water)	17%
Family fun or children's activities	54%
History or culture	17%
Other	86%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

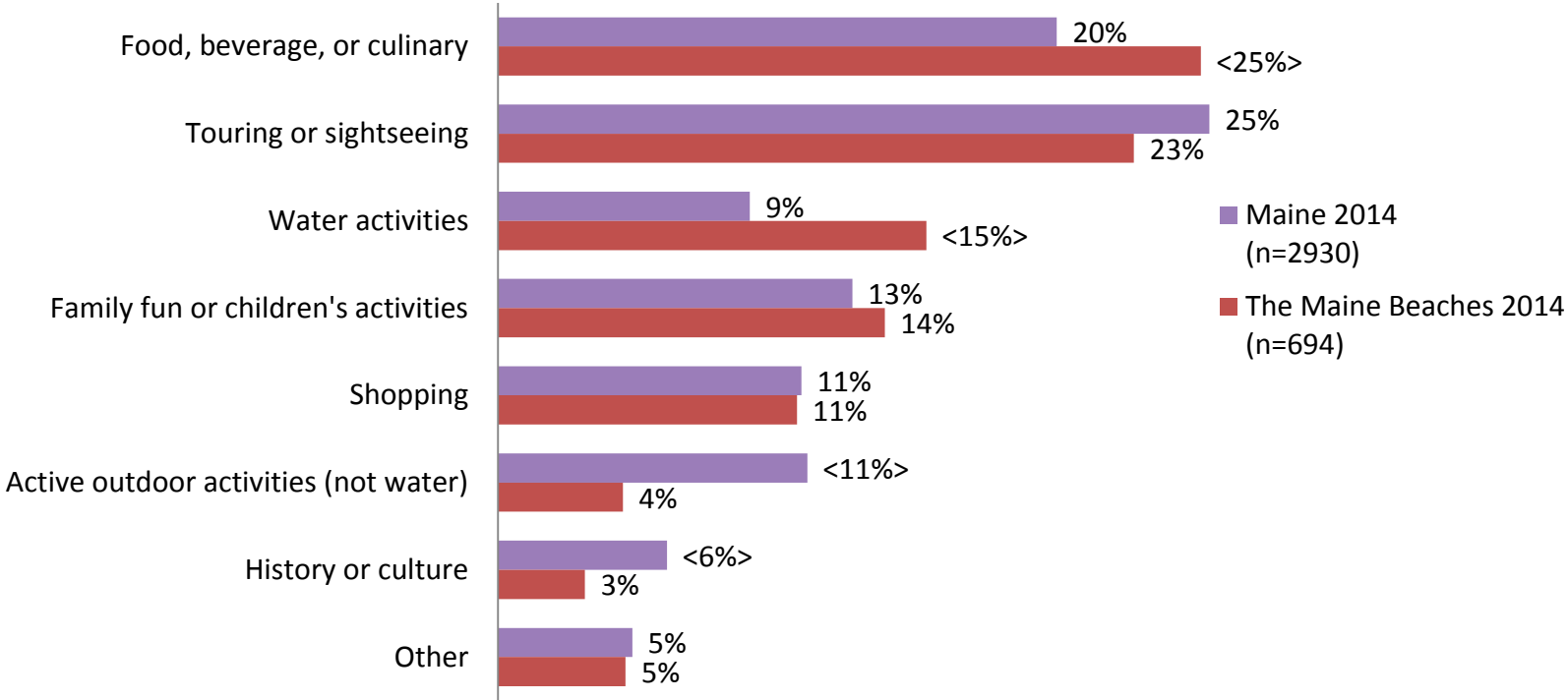
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

When analyzing both interest and importance, food/beverage/culinary activities and touring/sightseeing activities rank highest among Maine Beaches overnight visitors.

**2014 Interest Areas*
Importance Index**



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15
 <> indicates a significant difference between subgroups at the 95% confidence level.

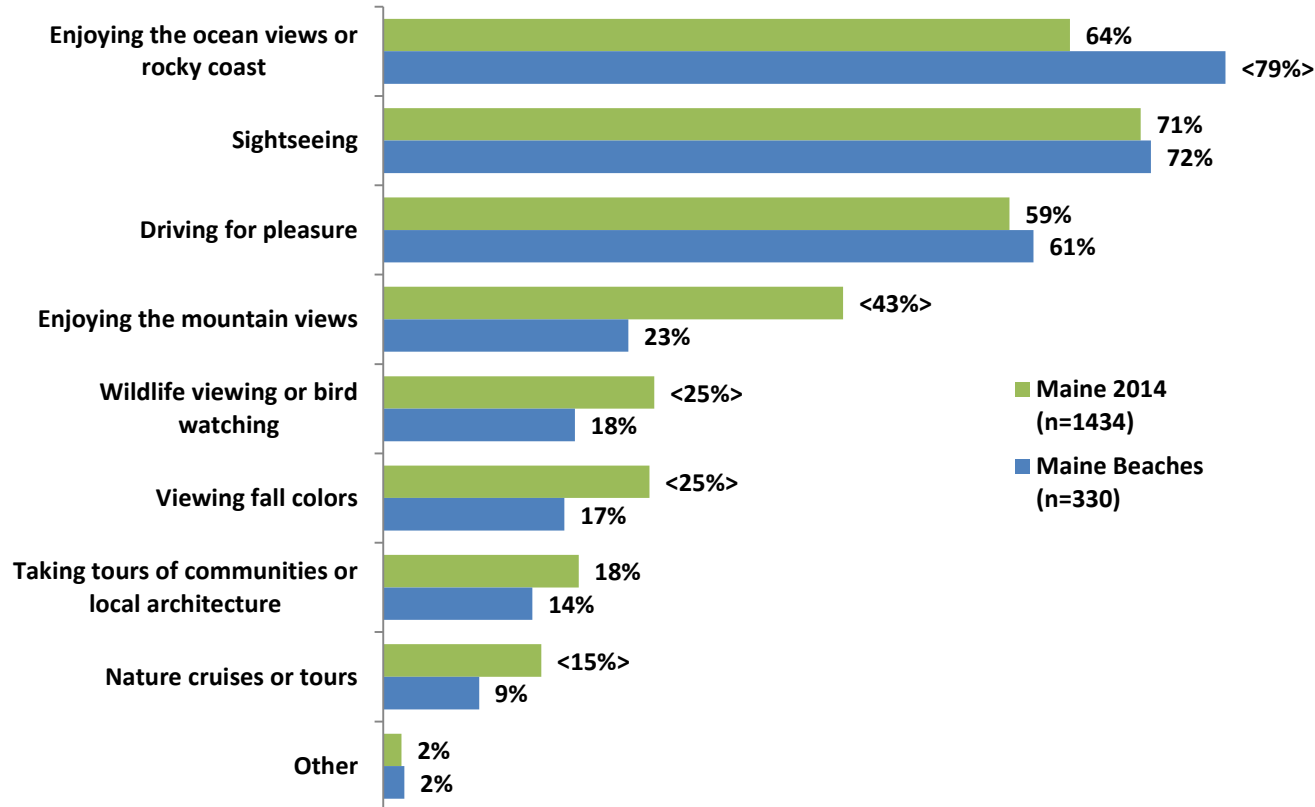
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.



Four in five overnight visitors interested in touring or sightseeing enjoyed the ocean views/rocky coast while visiting the region.

Touring or Sightseeing Activities*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

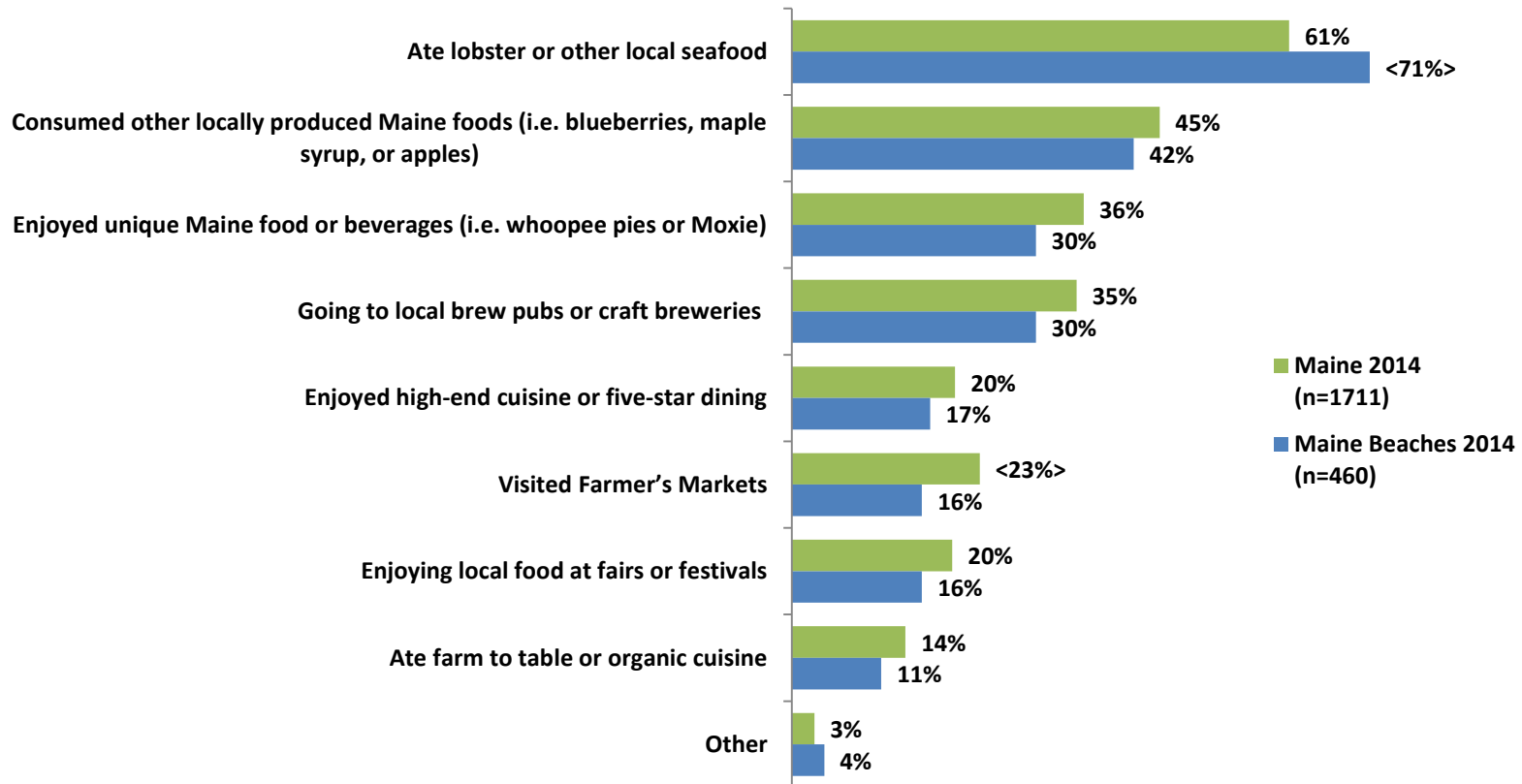
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Eating lobster or other local seafood is the most common way overnight visitors pursue food/beverage/culinary interests in the Maine Beaches region.

Food, Beverage, or Culinary Activities*

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



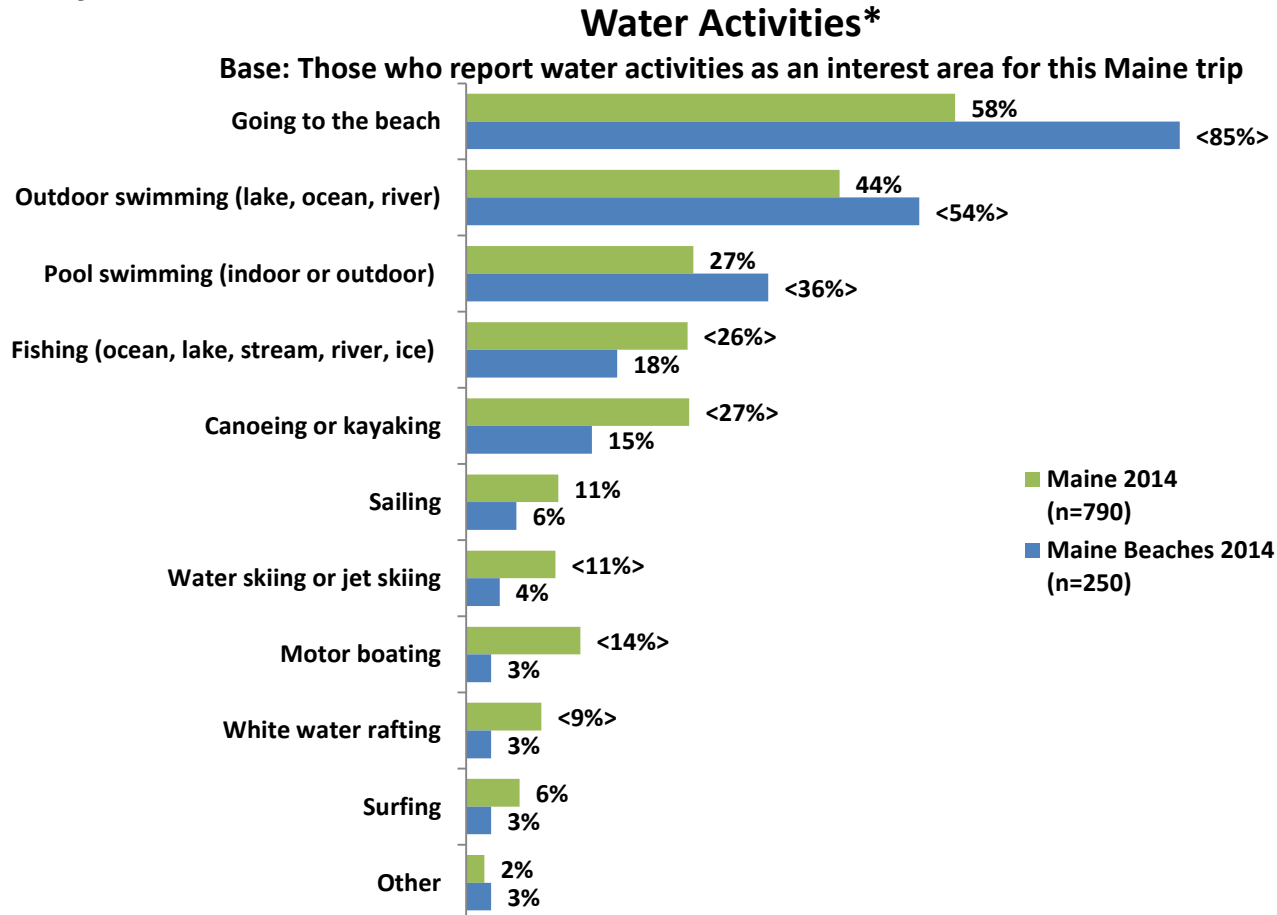
Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Among overnight visitors interested in water activities, *going to the beach* is by far the most popular water activity.

- Participation in water activities among visitors to the Maine Beaches is significantly different from the rest of the State. Visitors to the Maine Beaches are more likely to *go to the beach* or *swim* (either indoors or outdoors). Furthermore, overnight visitors are less likely to *canoe or kayak*, *fish*, *motor boat*, *water/jet ski*, or *white water raft* than visitors to Maine overall.



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

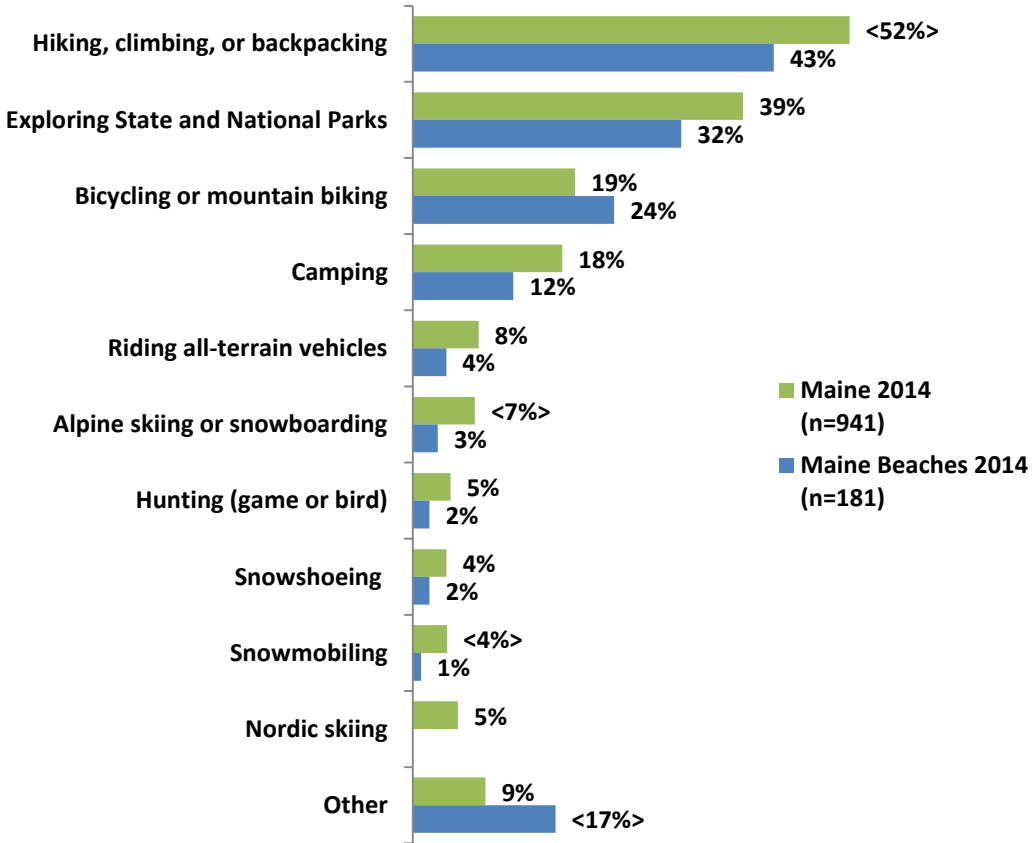
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Visitors to the Maine Beaches interested in non-water based active outdoor activities are most likely *hiking, climbing, or backpacking*.

Active Outdoor Activities – Non-Water*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

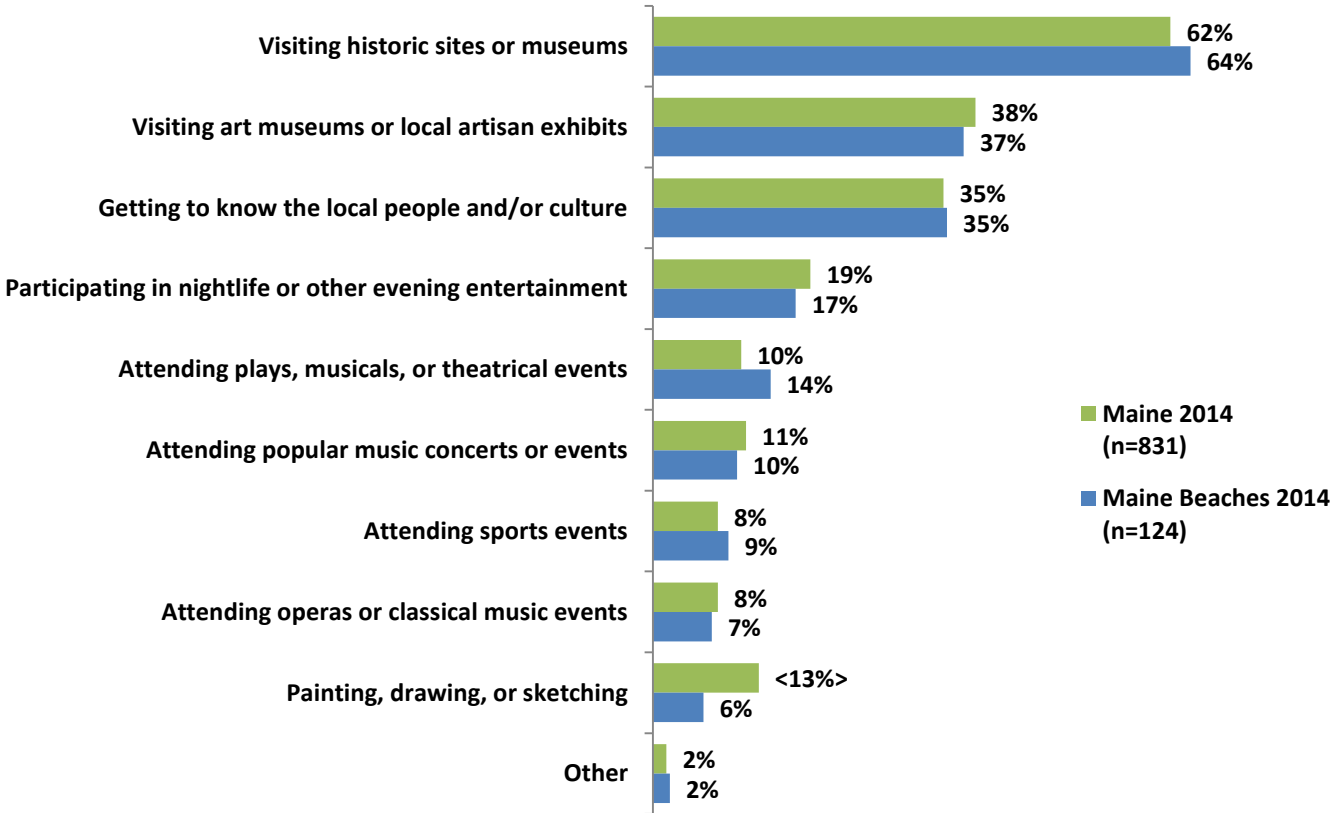
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Visits to *historic sites or museums* are the predominant way of participating in history or culture activities among overnight visitors to the Maine Beaches.

History or Culture Activities*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

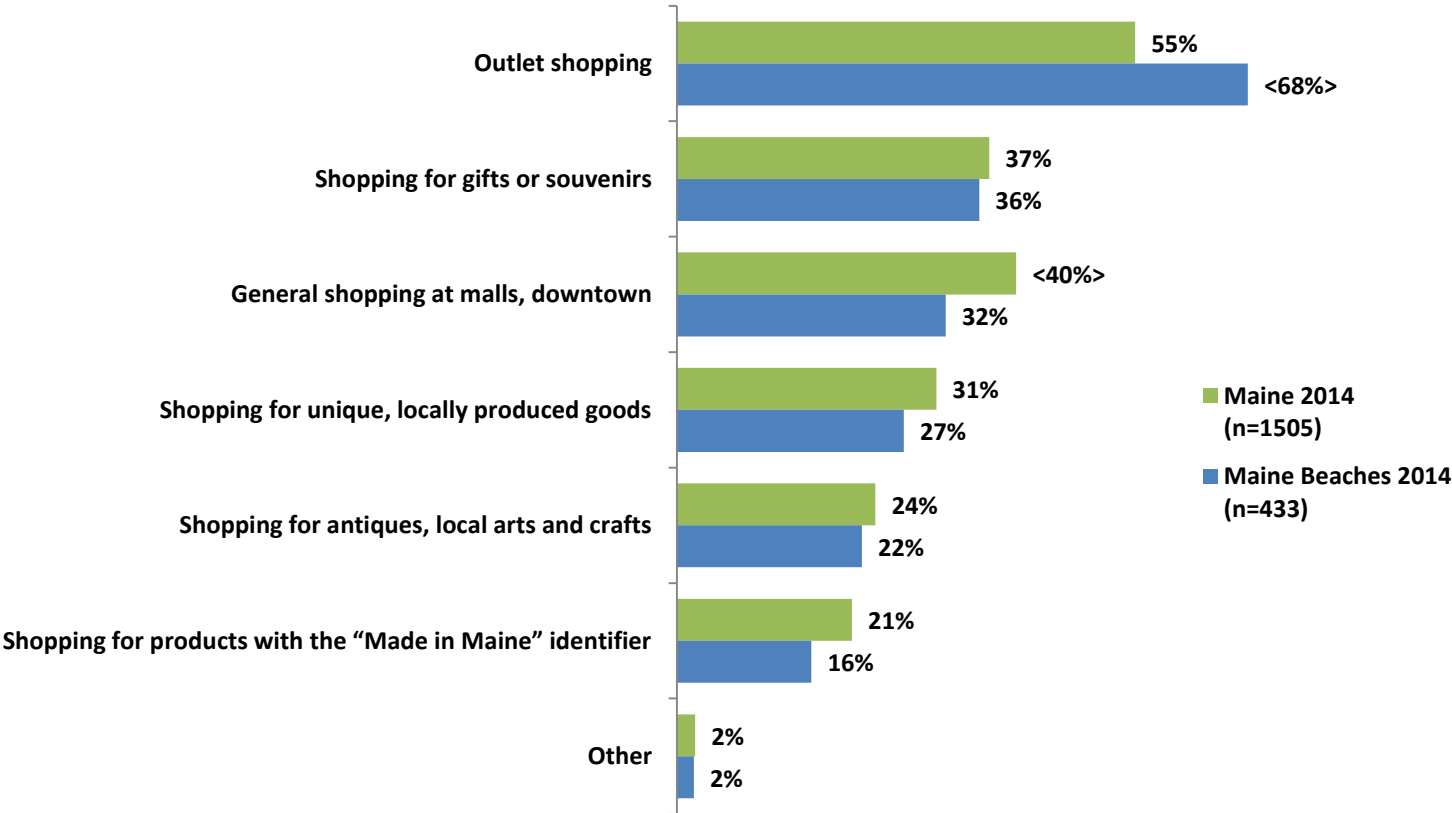
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Two in three visitors to the Maine Beaches interested in shopping does some *outlet shopping* during their visit.

Shopping Activities*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

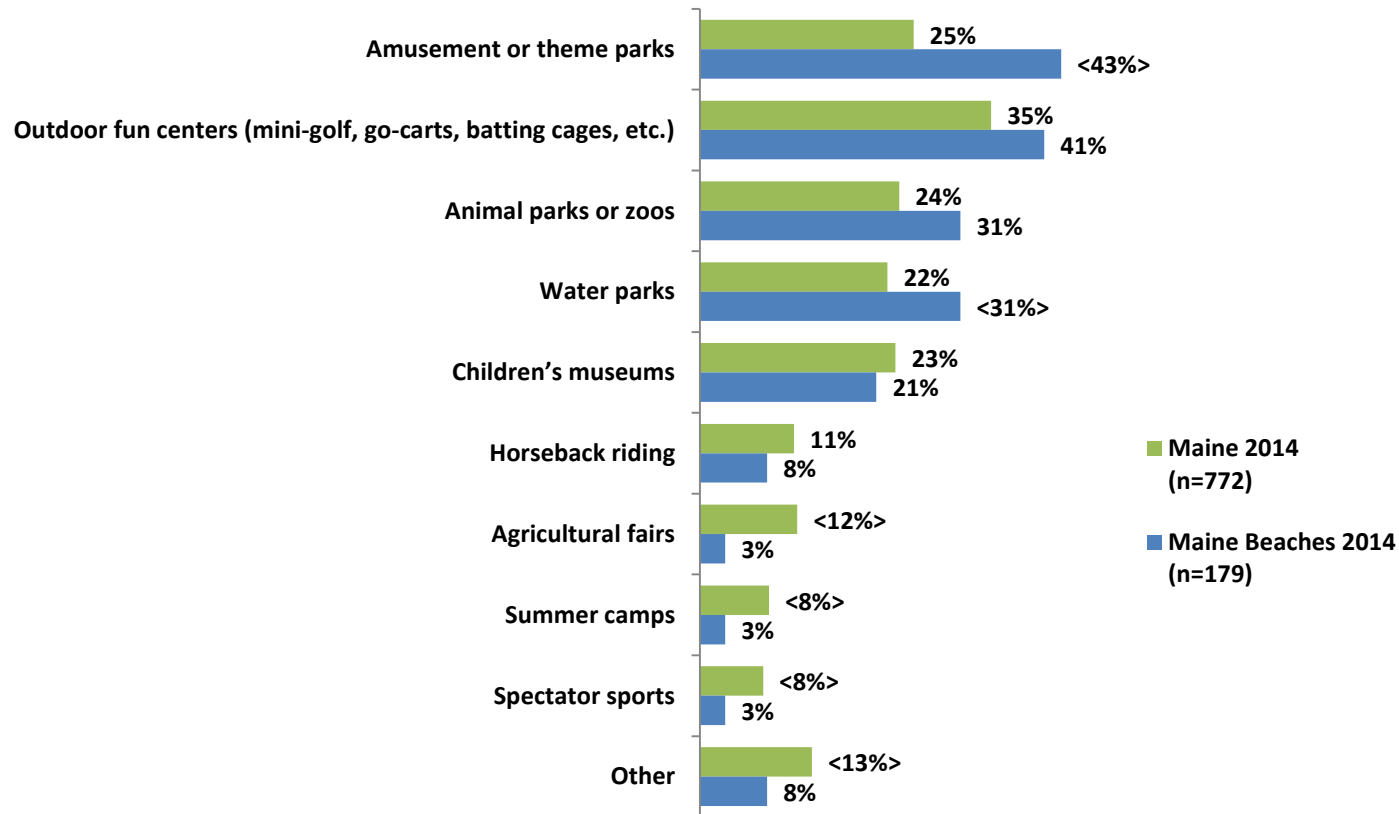
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Amusement/theme parks are visited by two in five overnight visitors to the region who are interested in family fun/children's activities.

Family Fun/Children's Activities*

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

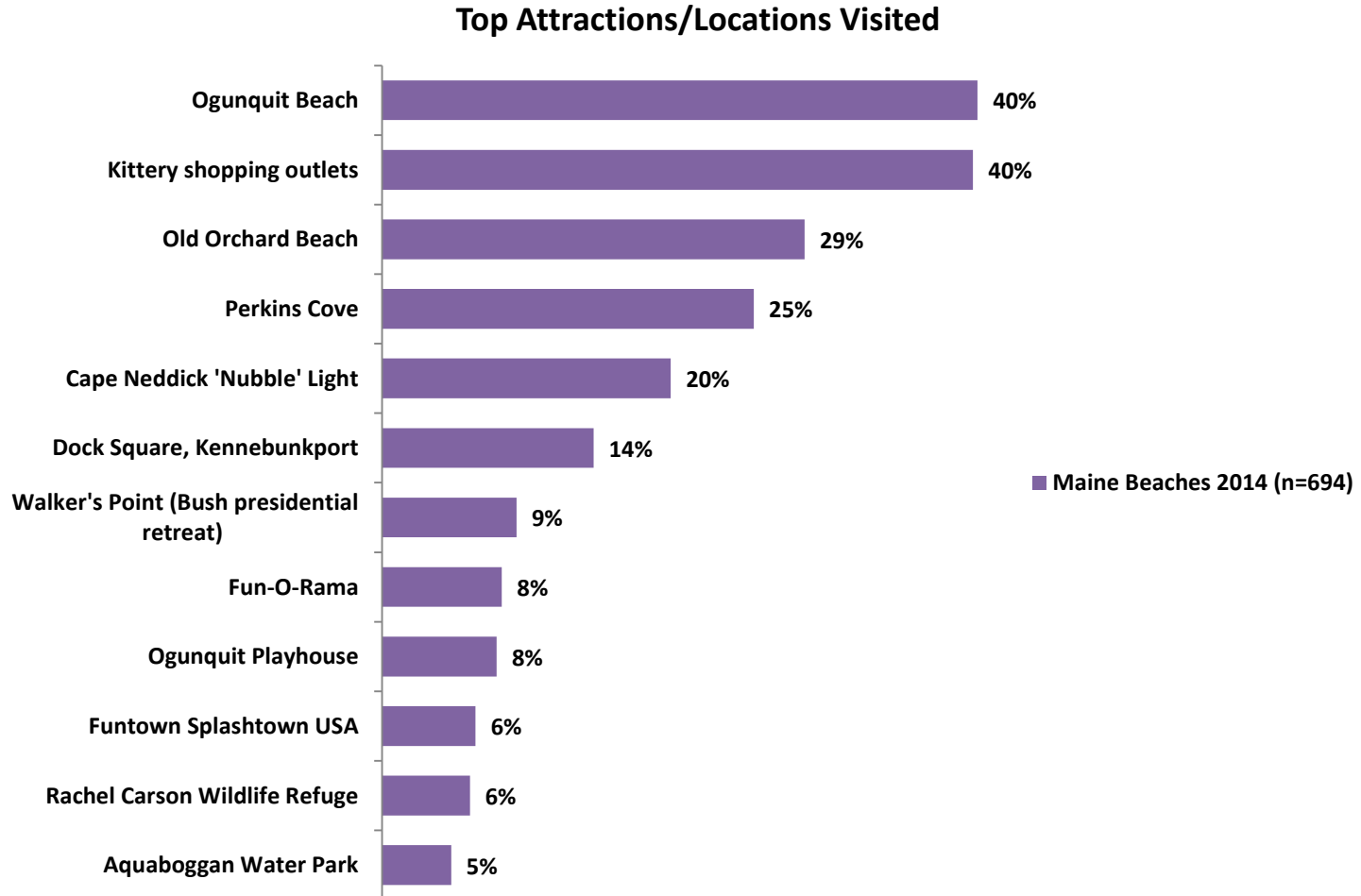


Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

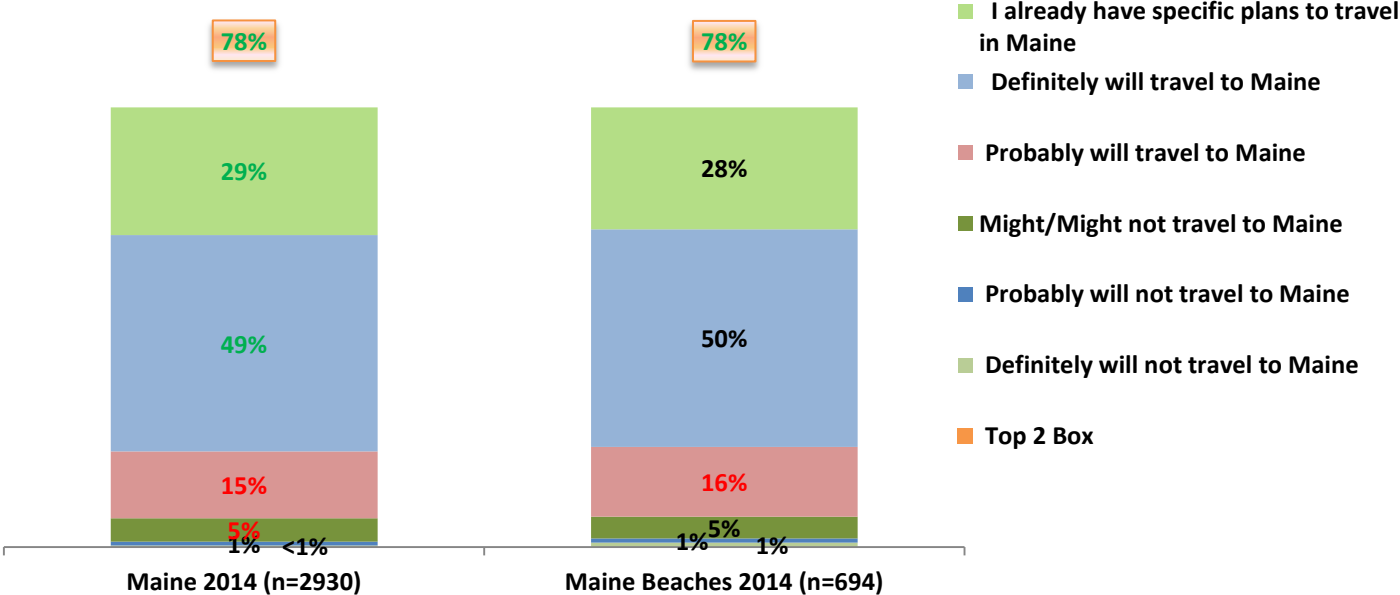
Ogunquit Beach and the Kittery shopping outlets are the most commonly visited attractions in the Maine Beaches region.



Q26: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

Three in four overnight visitors to the Maine Beaches region plan to return to Maine in the next two years.

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Maine Beaches region are 49 years old, on average, and earn just over \$100,000 annually. Seven in ten have at least a college degree, and two-thirds are married. Half are employed full-time.
- Day visitors to the Maine Beaches region are older, and have higher average annual household incomes in comparison to day visitors to Maine overall.

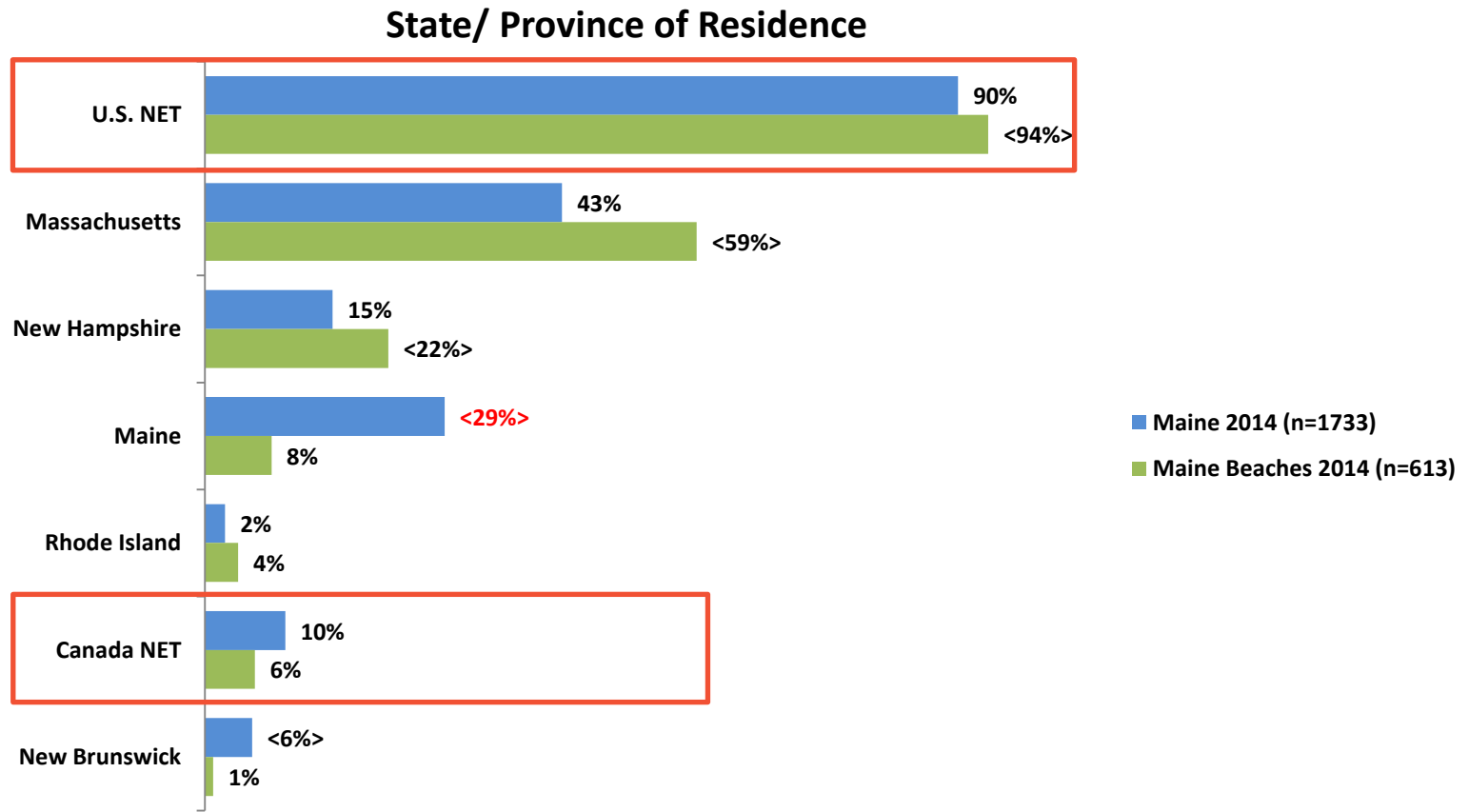
Day Visitors	Maine 2014 (n=1733)	Maine Beaches 2014 (n=613)
Age:		
< 35	24%	22%
35 - 44	16%	15%
45 - 54	22%	24%
55 +	38%	40%
Mean Age (Years)	47.9	<49.3>
Income:		
< \$50,000	22%	15%
\$50,000 - \$99,999	43%	44%
\$100,000 +	36%	41%
Mean Income (Thousands)	\$93,610	<\$101,860>
Female	56%	57%
College Degree or Higher	69%	70%
Married	64%	65%
Employed Full Time	54%	49%

<> indicates a significant difference between subgroups at the 95% confidence level.

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

Nearly all day visitors to the region are US residents, and Massachusetts supplies well over half of day visitors.

- Massachusetts and New Hampshire residents comprise a greater proportion of day visitors to the Maine Beaches region than to the State of Maine as a whole. In-state residents and New Brunswick residents comprise a lesser proportion of day visitors to this region than to the State as a whole.

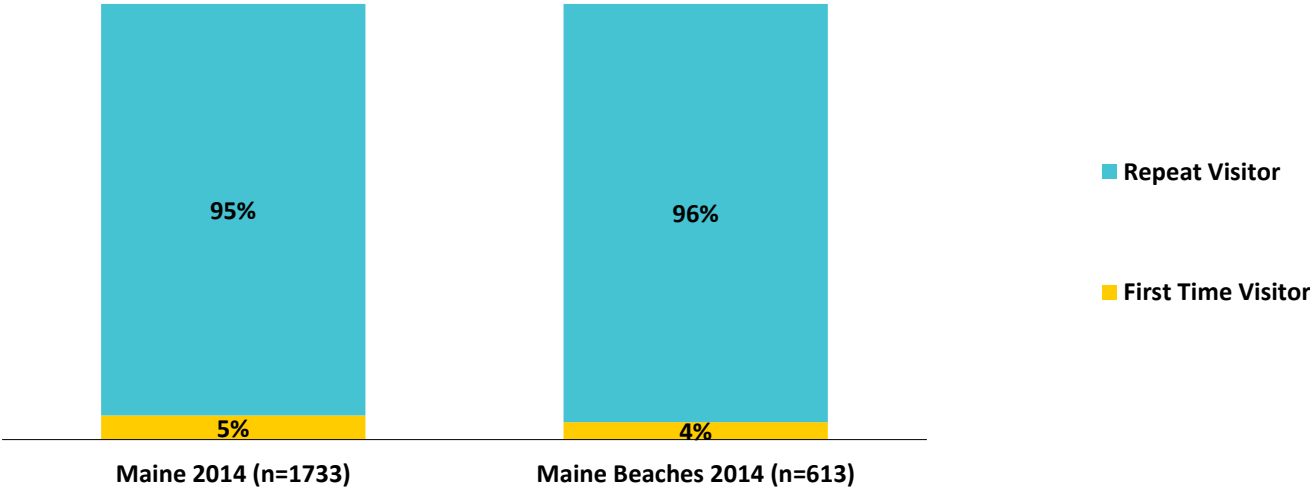


Q2. In what State or Province do you reside?

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

Similar to the State of Maine as a whole, very few day visitors to the Maine Beaches are first time visitors to Maine.

Repeat vs. First Time Visitors

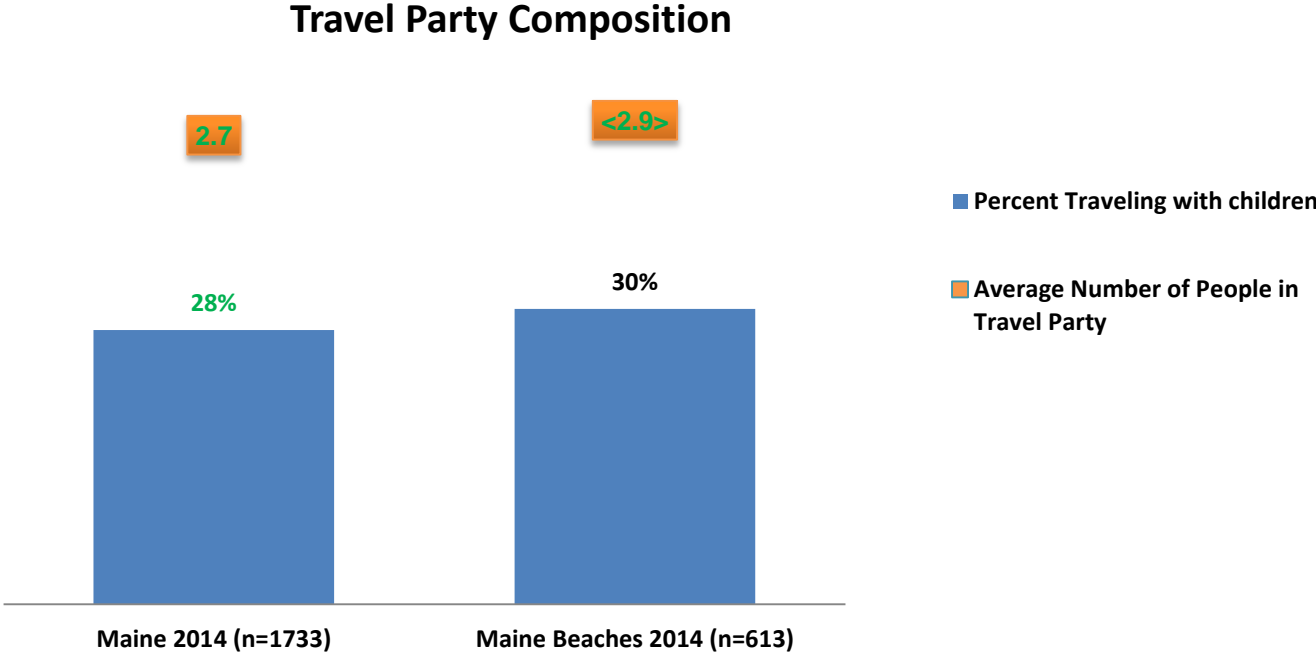


Q10. Was this your first trip to Maine?

Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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

On average, day visitors to the Maine Beaches region are traveling in parties of three, and nearly one-third are traveling with children.



Q14. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q15. How many of these people were: Children

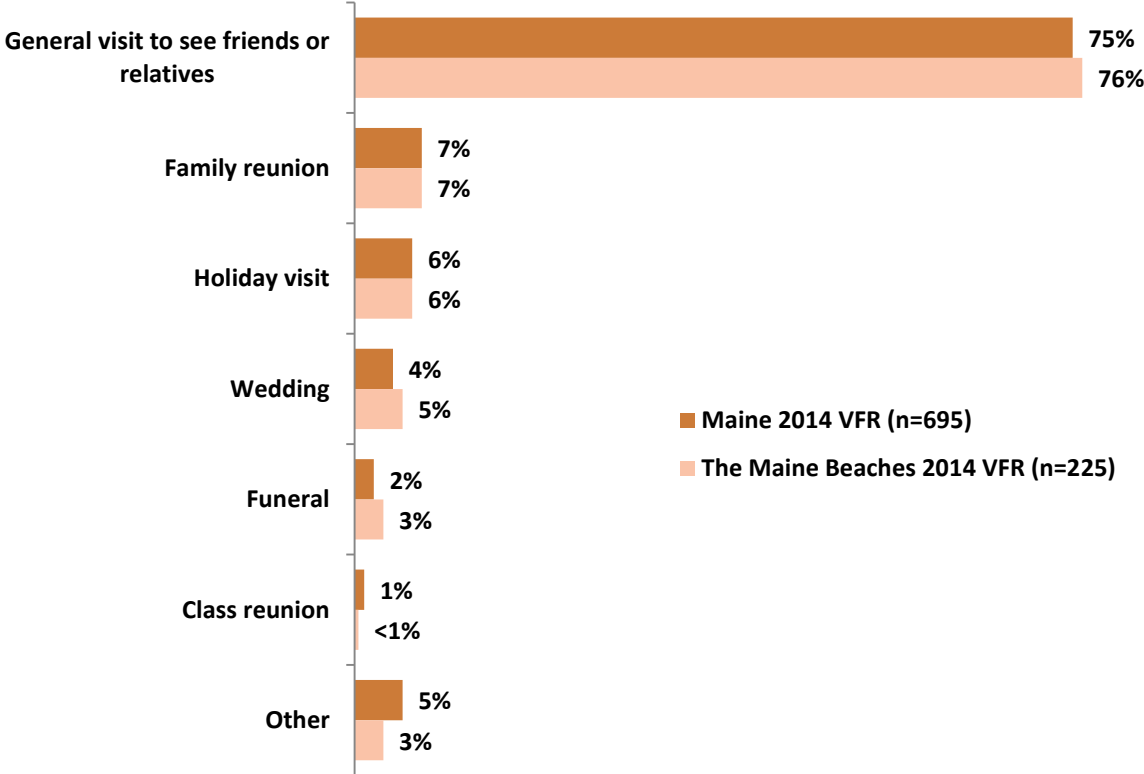
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Three-fourths of VFR day trippers cite a *general visit to see friends or relatives* as the primary purpose of their trip to the Maine Beaches.

Primary Purpose of Day VFR Trips

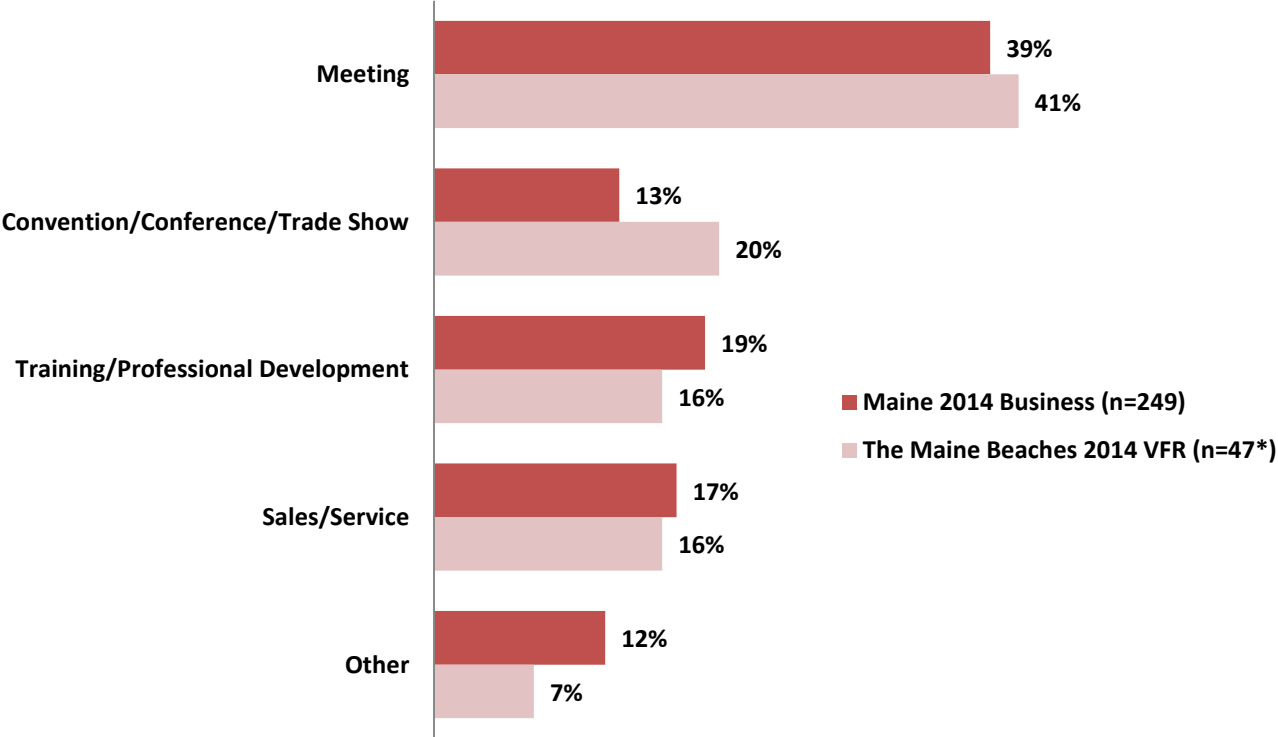


Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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

Business day visitors to the Maine Beaches region are most likely to be visiting for a *meeting*.

Primary Purpose of Day Business Trips



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

<> indicates a significant difference between subgroups at the 95% confidence level.

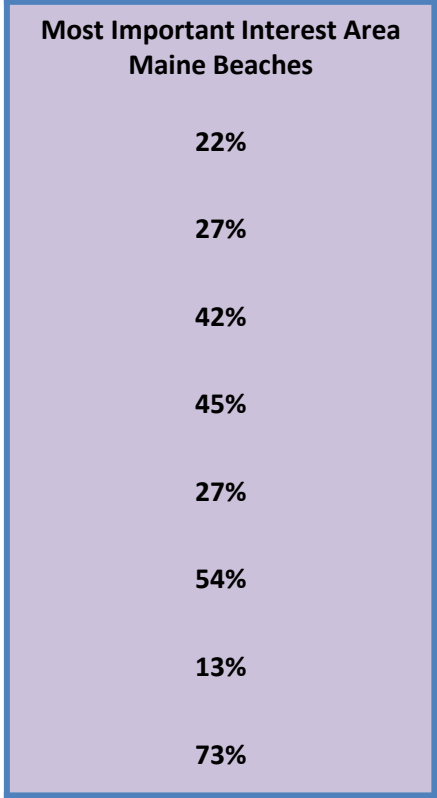
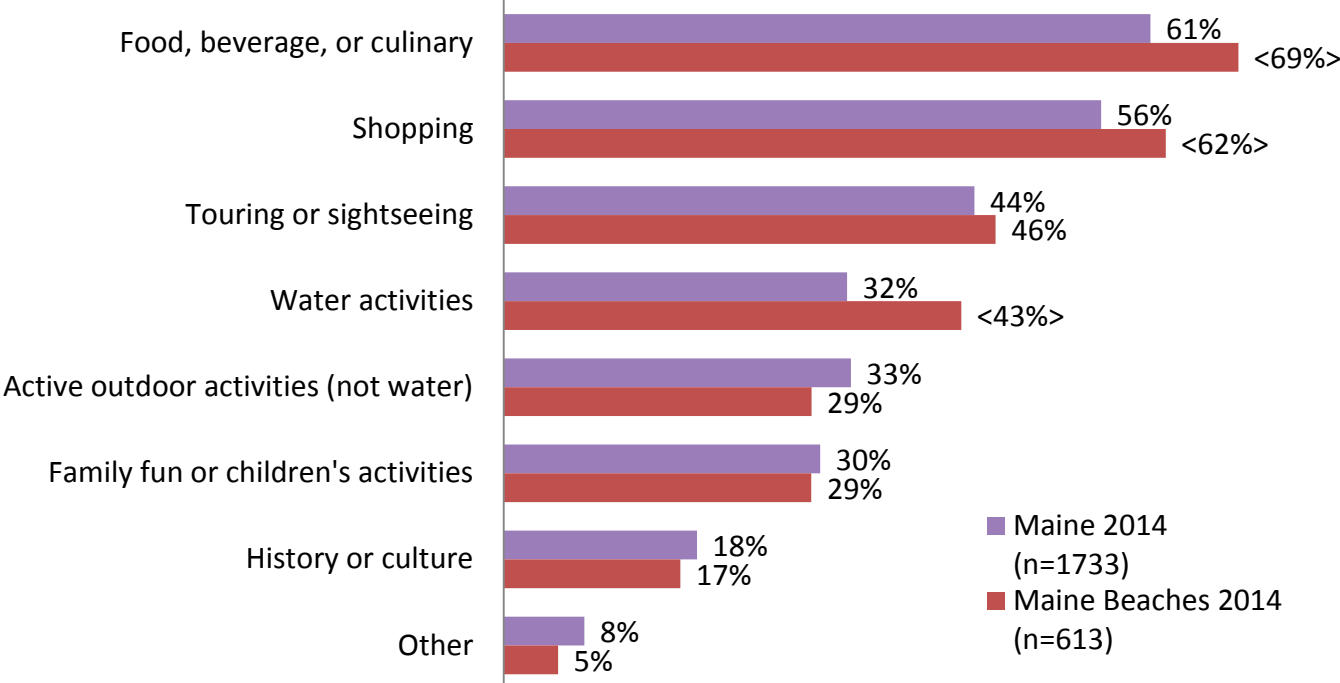
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

**Please note small sample size.*

Day visitors to the Maine Beaches are especially likely to pursue food/beverage/culinary or shopping interests.

- Similar to overnight visitors, day visitors to this region are more likely to be interested in food/beverage/culinary activities, shopping, or water activities.

2014 Interest Areas*



Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

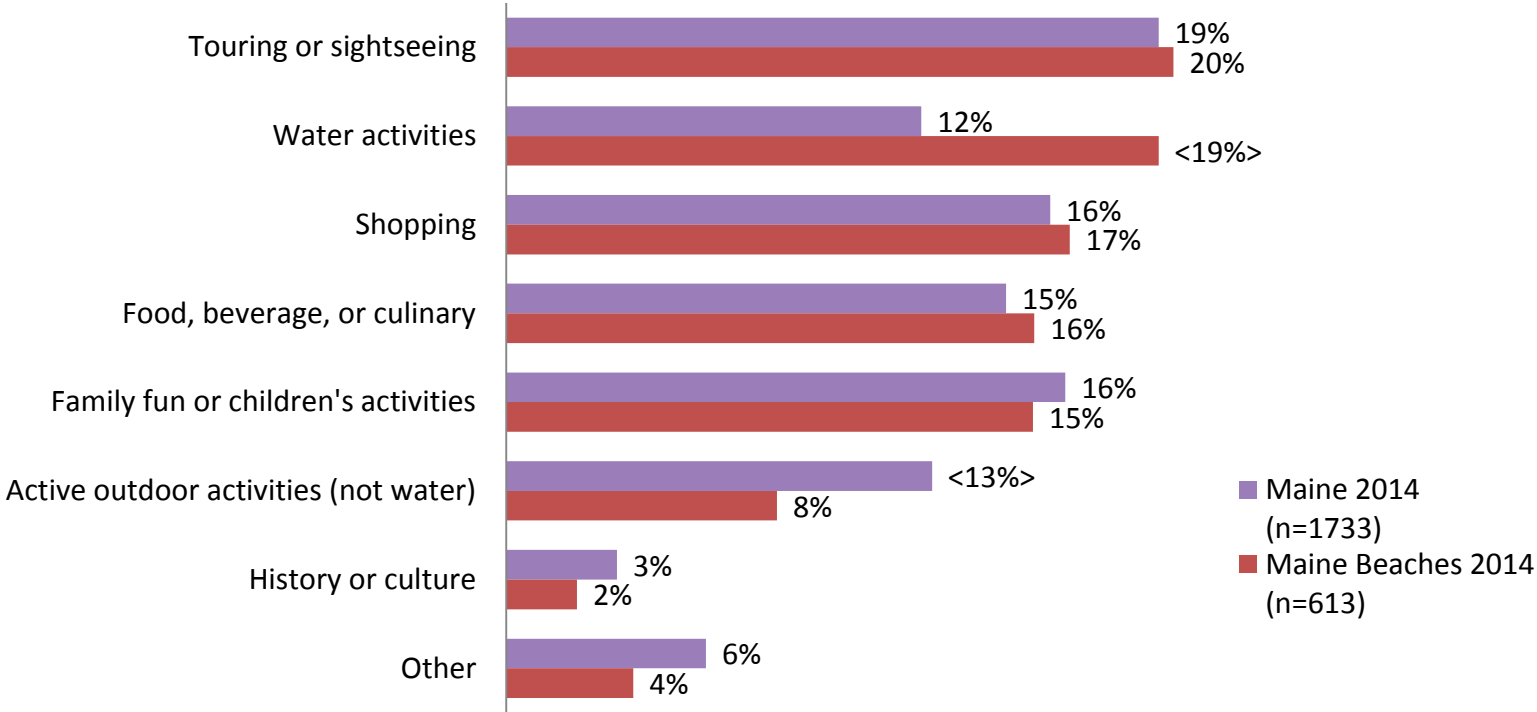
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

When analyzing both interest and importance in deciding to visit, touring/sightseeing activities and water activities rank highest among day visitors.

**2014 Interest Areas*
Importance Index**



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.
 <> indicates a significant difference between subgroups at the 95% confidence level.

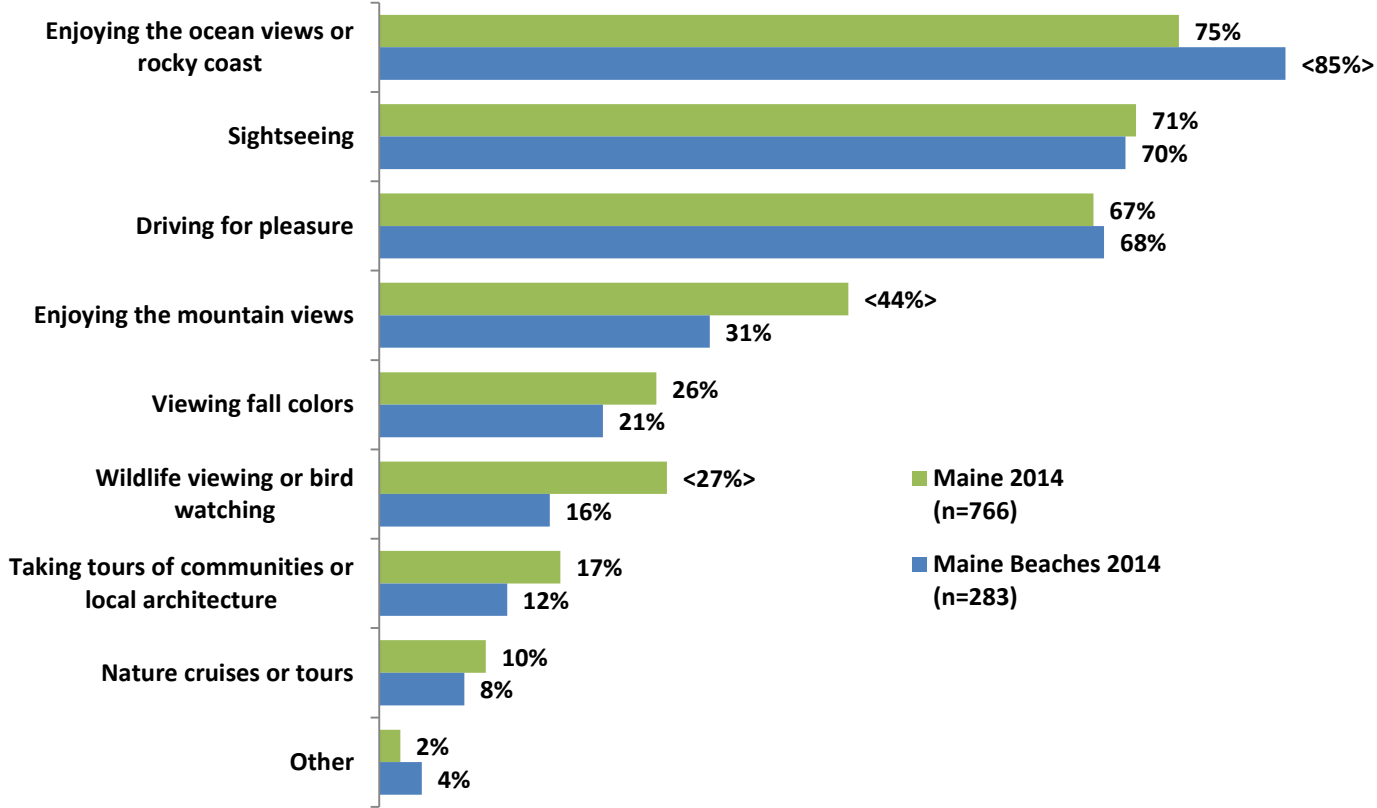
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years



Enjoying the ocean views or rocky coast is the most popular activity among day visitors to the Maine Beaches who are interested in touring/sightseeing activities.

Touring or Sightseeing Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

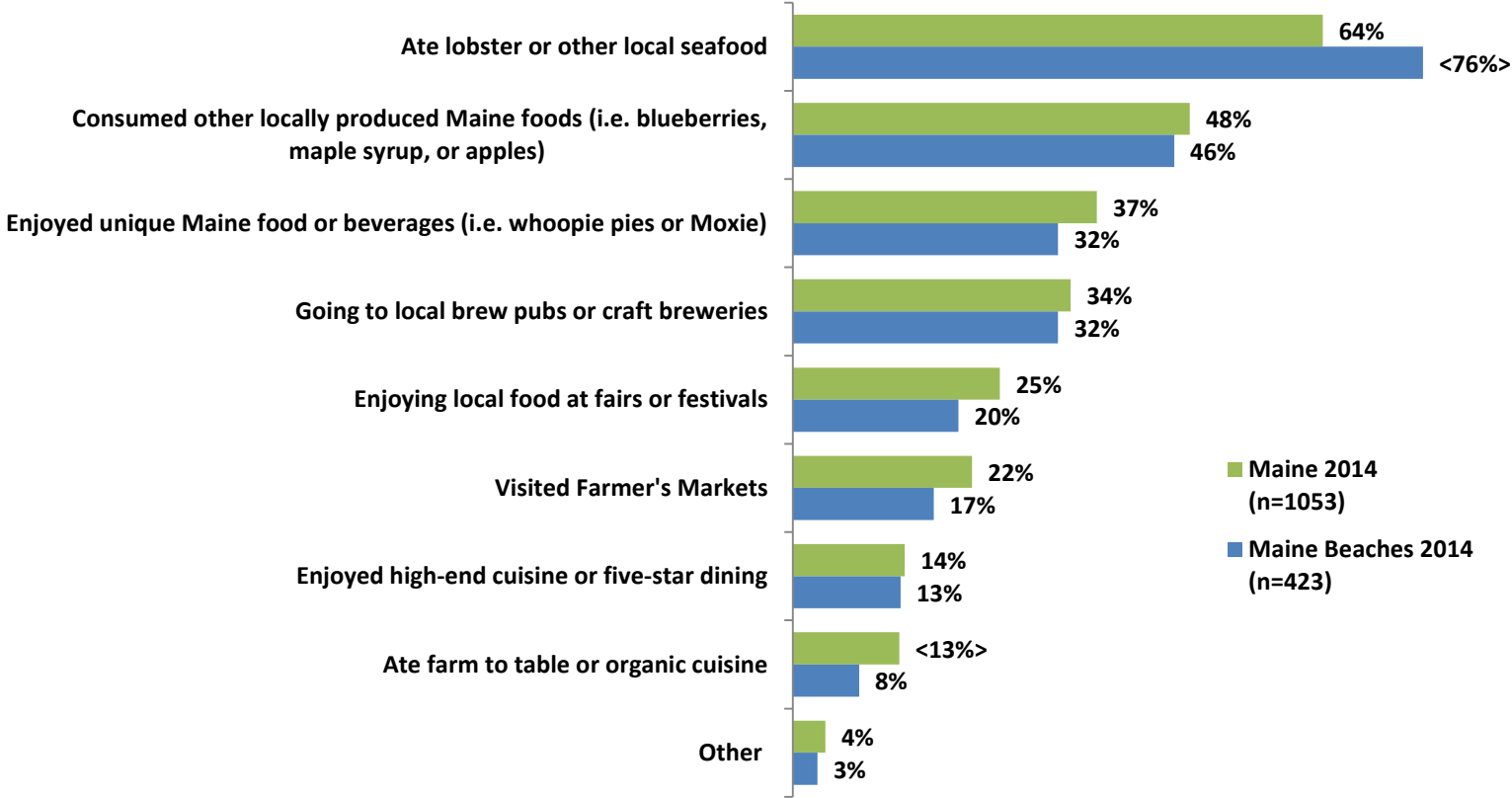
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Three-fourths of day visitors interested in food/beverage/culinary activities *ate lobster or other local seafood* while visiting the region.

Food, Beverage, or Culinary Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

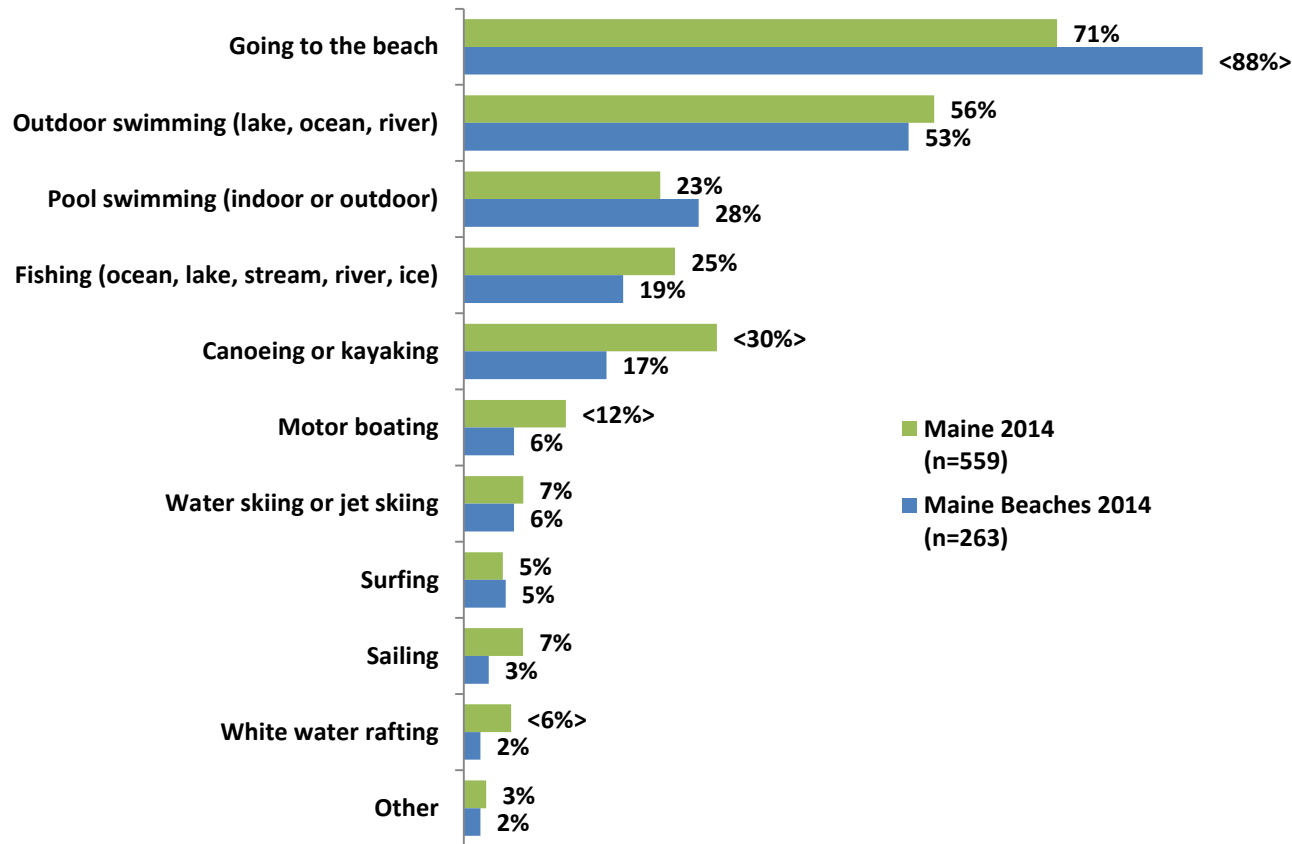
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Nine in ten visitors to the Maine Beaches interested in water activities went to the *beach*.

Water Activities*

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



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

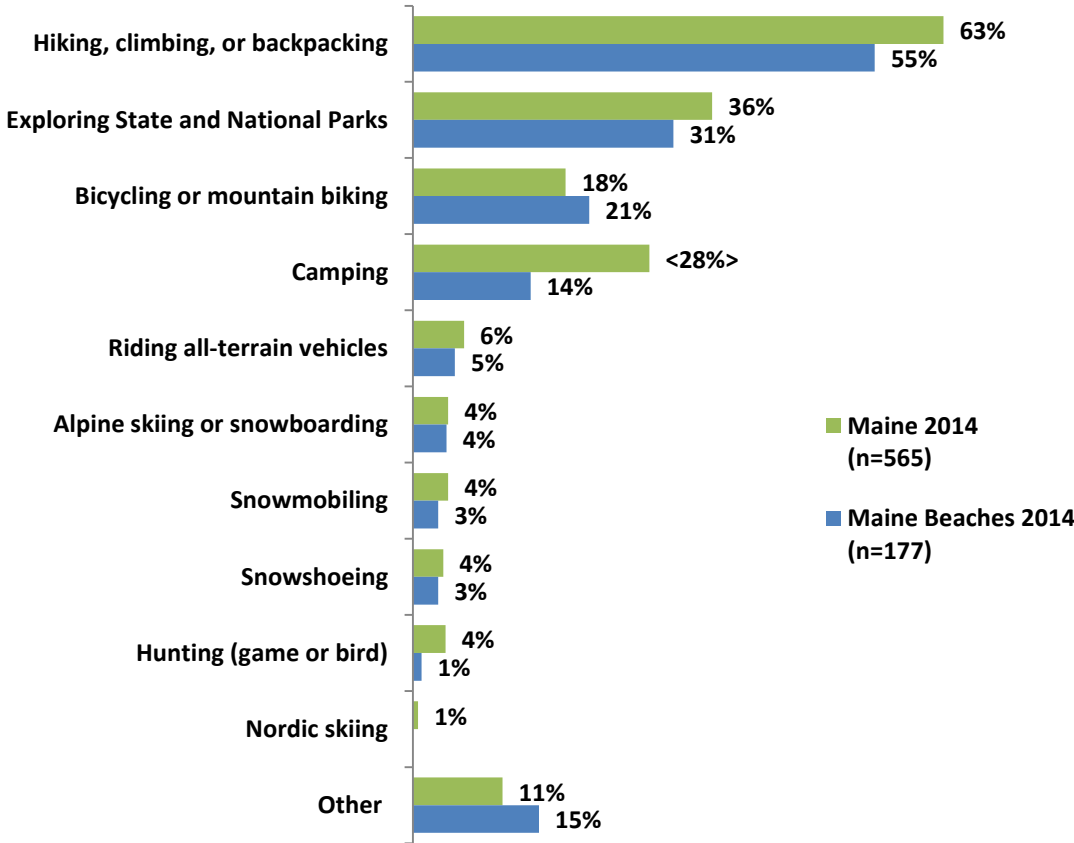
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Hiking/climbing/backpacking is the most common activity among day visitors interested in active (non-water) outdoor activities.

Active Outdoor Activities – Non-Water*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

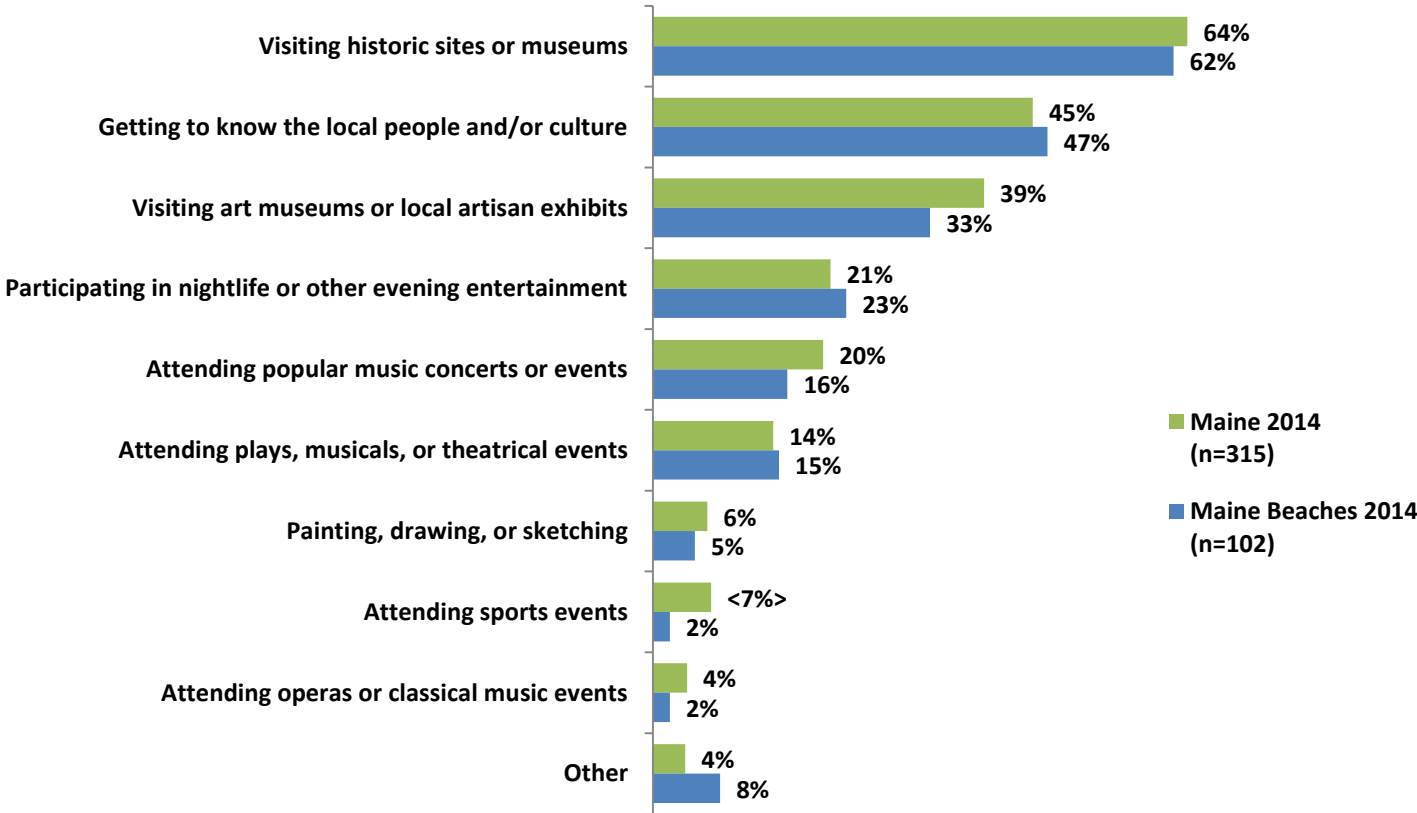
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

The most common history or culture activity day visitors to this region engage in is *visiting historic sites or museums*.

History or Culture Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Three in four day visitors who are interested in shopping activities shopped at the outlets during their trip to the Maine Beaches.

Shopping Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

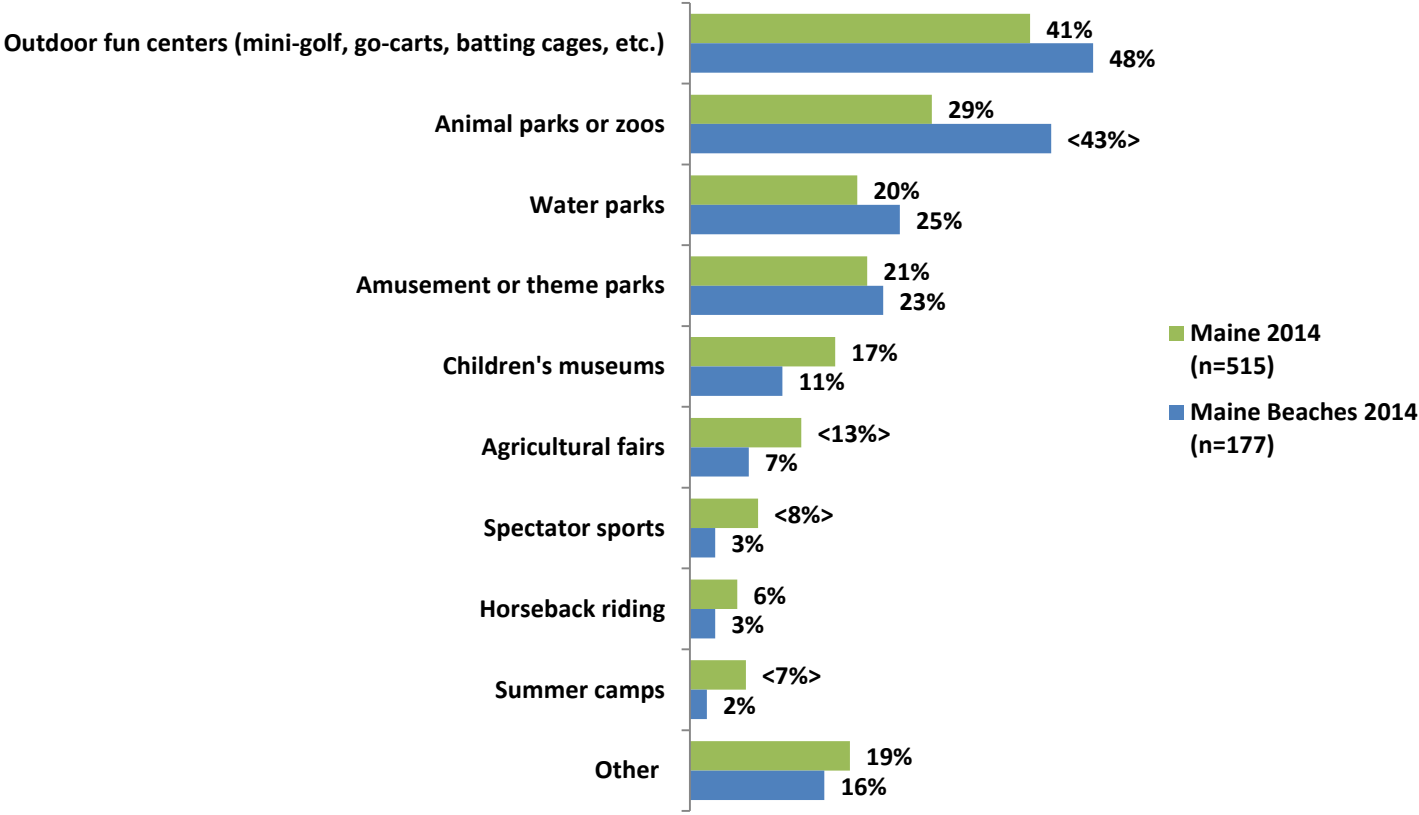
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Outdoor fun centers and animal parks or zoos are the most common family fun/children’s activities participated in by day visitors to the Maine Beaches.

Family Fun/Children’s Activities*

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

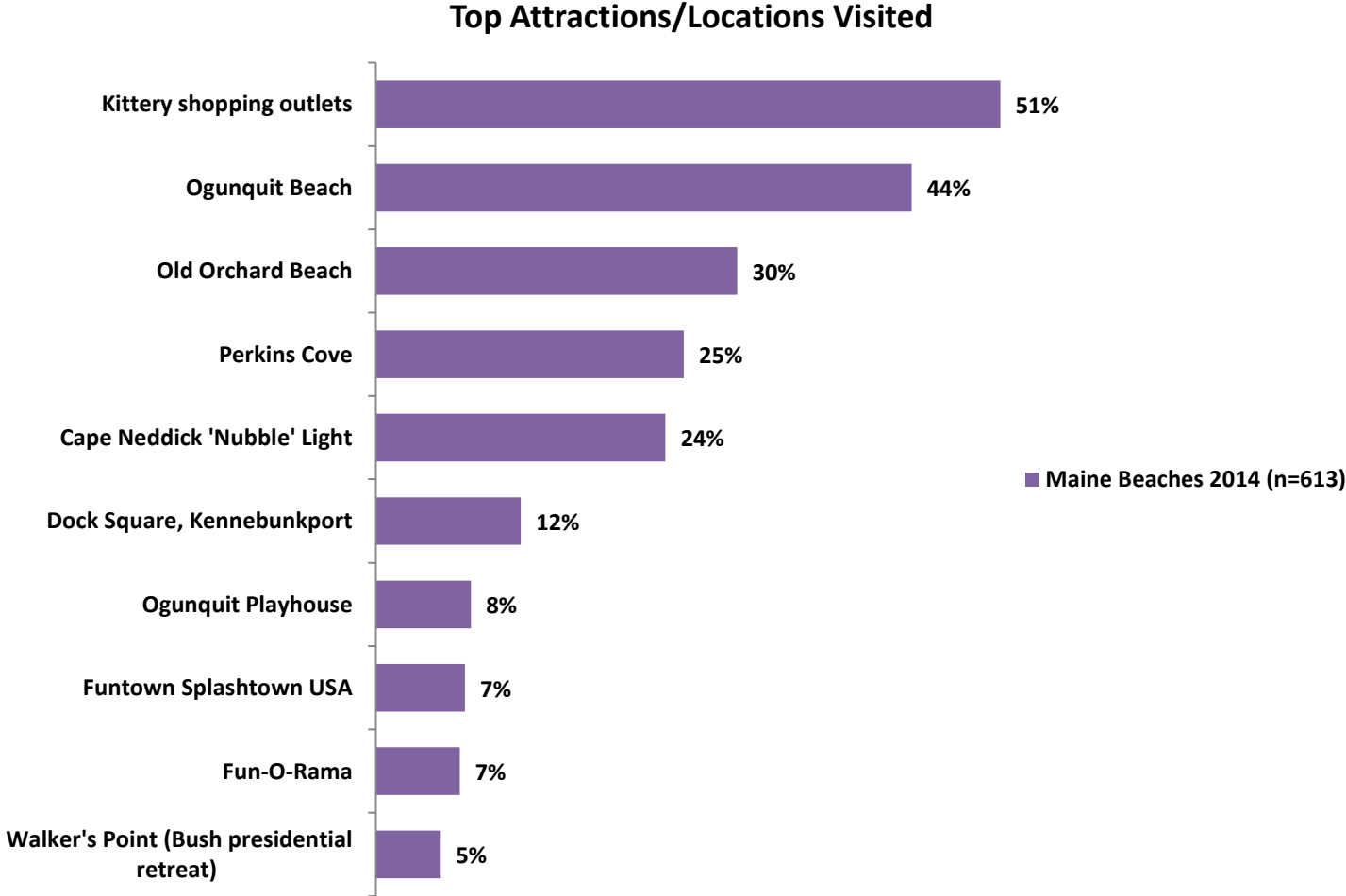


Q19. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

One in two day visitors to the Maine Beaches visits the Kittery shopping outlets while visiting the region.



Q23: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

Comparison of *Maine Beaches* Visitors to Maine Visitors



Comparisons: Region vs. State

- Visitors to the Maine Beaches tourism 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, visitor origin, their areas of interest, and the activities they participate in while visiting.
- Visitor origin can clearly be attributed to the location of the Maine Beaches region, in close proximity to Massachusetts. Popular trip activities closely follow the many shopping and beach activities available in the Maine Beaches region.
- Highlights – Maine Beaches region vs. State visitors:

Visitor Origin

- **A greater proportion** of overnight and day visitors to the region from **New England, specifically Massachusetts and New Hampshire.**
- **A lesser proportion** of day visitors to the region from **Maine and New Brunswick.**

Visitor Demographics

- Both overnight and day visitors to the region are **older** on average than visitors to the State of Maine as a whole.
- Overnight visitors to the Maine Beaches are **less** likely to be **employed full-time.**
- Day visitors to the region have **higher annual household incomes** on average than day visitors to the State.

Comparisons: Region vs. State

- Highlights Continued:

First-Time/Repeat Visitation

- Overnight visitors **more** likely to be **repeat visitors**.

Average Party Size

- Overnight and day visitors travel in **larger** parties than visitors to the State as a whole.

Trip Interest Areas – Overnight and Day Visitors

- **More** likely to want to pursue the following interest areas:
 - Food/beverage/culinary activities
 - Shopping
 - Water activities

Trip Interest Areas – Overnight Visitors

- **Less** likely to want to pursue the following interest areas:
 - Active outdoor activities (non-water)
 - History or culture activities

Comparisons: Region vs. State

- Highlights Continued:

Maine Trip Interests and Importance (Importance Index)

Overnight and Day Visitors

- More likely to place importance on **water activities**
- Less likely to place importance on **active outdoor activities**

Overnight Visitors

- More likely to place importance on **food/beverage/culinary activities**
- Less likely to place importance on **history or culture activities**

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight and Day Visitors

- **More likely to be:**
 - Enjoying the ocean views
 - Eating lobster or other local seafood
 - Going to the beach
 - Outlet shopping
- **Less likely to be:**
 - Enjoying the mountain views
 - Wildlife viewing/bird watching
 - General shopping at malls/downtown
 - Canoeing/kayaking
 - Water skiing/jet skiing
 - Motor boating
 - Going to agricultural fairs
 - Summer camps
 - Spectator sports

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More likely to be:**
 - Swimming outdoors
 - Pool swimming
 - Visiting amusement or theme parks
 - Visiting water parks
- **Less likely to be:**
 - Viewing fall colors
 - Nature cruises or tours
 - Visiting Farmer’s Markets
 - Fishing
 - White water rafting
 - Hiking/climbing/backpacking
 - Alpine skiing
 - Snowmobiling
 - Painting, drawing, or sketching

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More** likely to be:
 - Visiting animal parks or zoos
- **Less** likely to be:
 - Attending sports events
 - Eating farm to table or organic cuisine



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