

**Maine Office of Tourism
Visitor Tracking Research
2015 Calendar Year Annual Report**

***Regional Insights:
Greater Portland & Casco Bay***

Prepared by



April 2016

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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 2015 for travel to Maine occurring from December 2015 through November 2015. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,779
 - Maine Day Visitor – 1,755
 - National Omnibus Survey – 17,812

Research Objectives and Methodology

- The following report summarizes the results among visitors to the Greater Portland & Casco Bay tourism region during 2015, including.
 - 354 overnight visitors, and
 - 255 day visitors.
- Throughout this report, data for the Greater Portland & Casco Bay 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 2014 and 2015 are also highlighted for both the Greater Portland & Casco Bay 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 Greater Portland/Casco Bay tourism region average 49 years old and have average annual household incomes of \$112,000. Over three-fourths have at least a college degree.
- Overnight visitors to Greater Portland & Casco Bay trend older than visitors to Maine overall. They also have higher annual incomes, and are more likely to have a college degree than visitors to Maine overall.

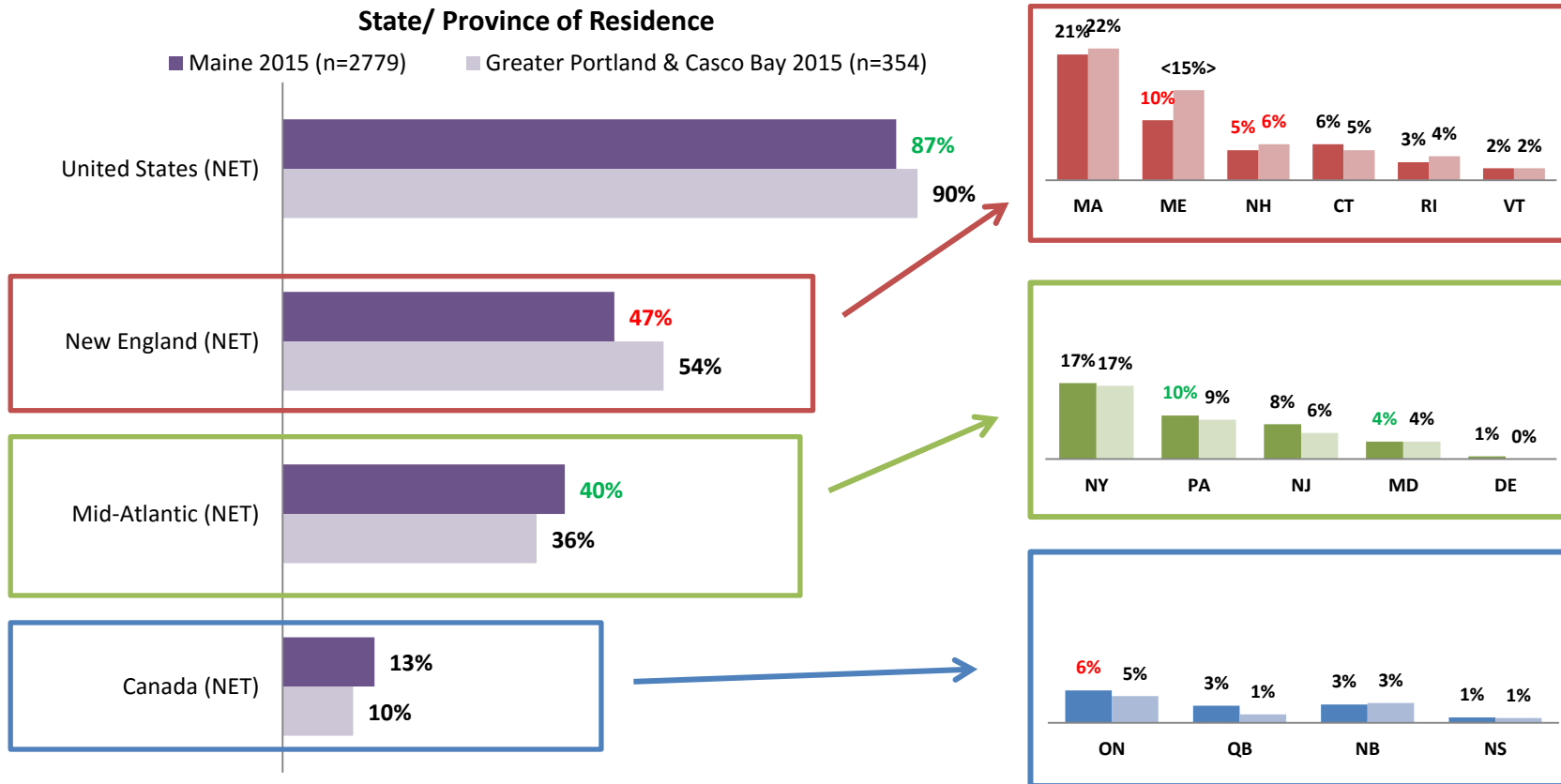
Overnight Visitors	Maine 2015 (n=2779)	Greater Portland & Casco Bay 2015 (n=354)
Age:		
< 35	<30%>	24%
35 - 44	19%	16%
45 - 54	19%	18%
55 +	31%	<42%>
Mean Age (Years)	45.4	<48.7>
Income:		
< \$50,000	17%	12%
\$50,000 - \$99,999	41%	38%
\$100,000 +	42%	<50%>
Mean Income (Thousands)	\$103,770	<\$112,170>
Female	58%	56%
College Degree or Higher	73%	<79%>
Married	64%	64%
Employed Full Time	63%	59%

<> 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.

Nine in ten overnight visitors to the Greater Portland/Casco Bay region are from the U.S., with most arriving from New England.

- Massachusetts and New York are the top states sending overnight visitors to the Greater Portland/Casco Bay region.
- The Greater Portland/Casco Bay region attracts a higher proportion of in-state overnight visitors than does the State of Maine as a whole.



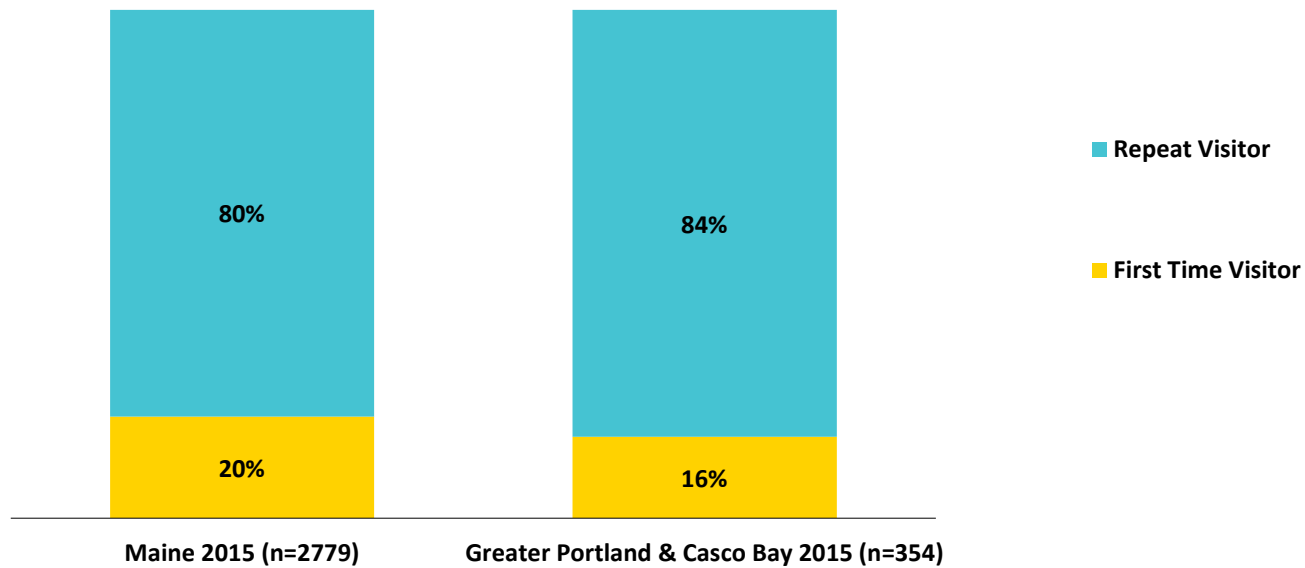
State/ Province of Residence

< > 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.

The vast majority of overnight visitors to the Greater Portland/ Casco Bay region are repeat visitors.

Repeat vs. First Time Visitors



Q11. Was this your first visit in Maine?

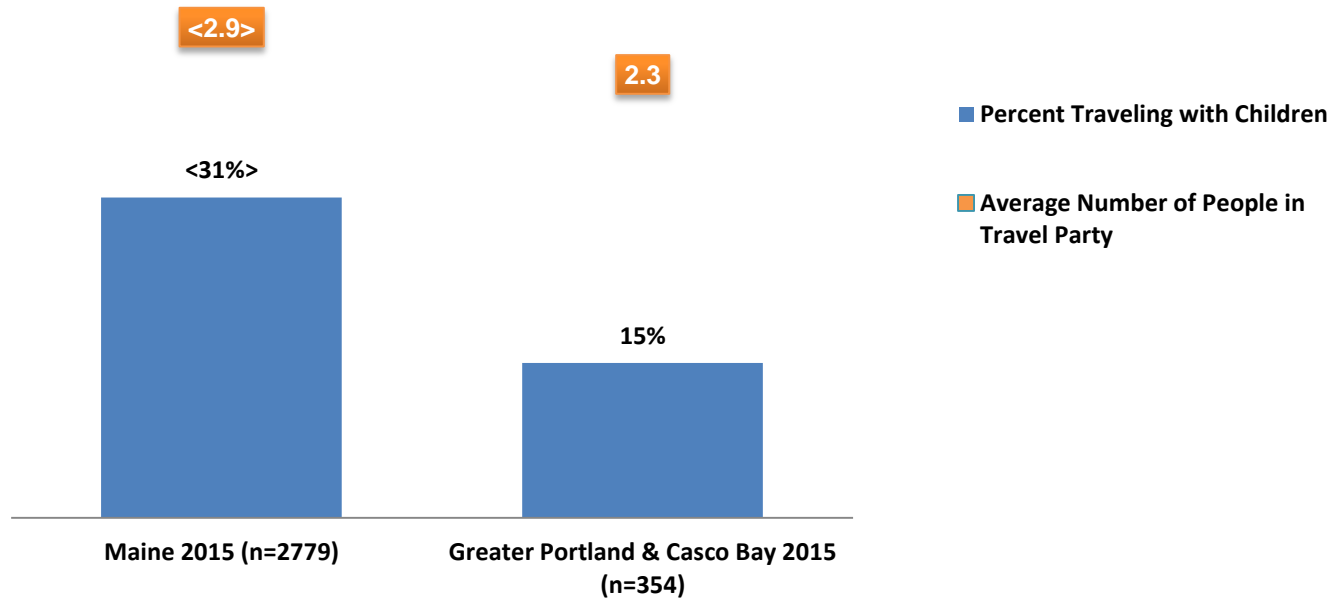
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Just over 10% of overnight visitors to the Greater Portland & Casco Bay region traveled with children.

- Travel parties to the Greater Portland/Casco Bay region are smaller than travel parties to the State as a whole and less likely to include children.

Travel Party Composition



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?

< > 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.

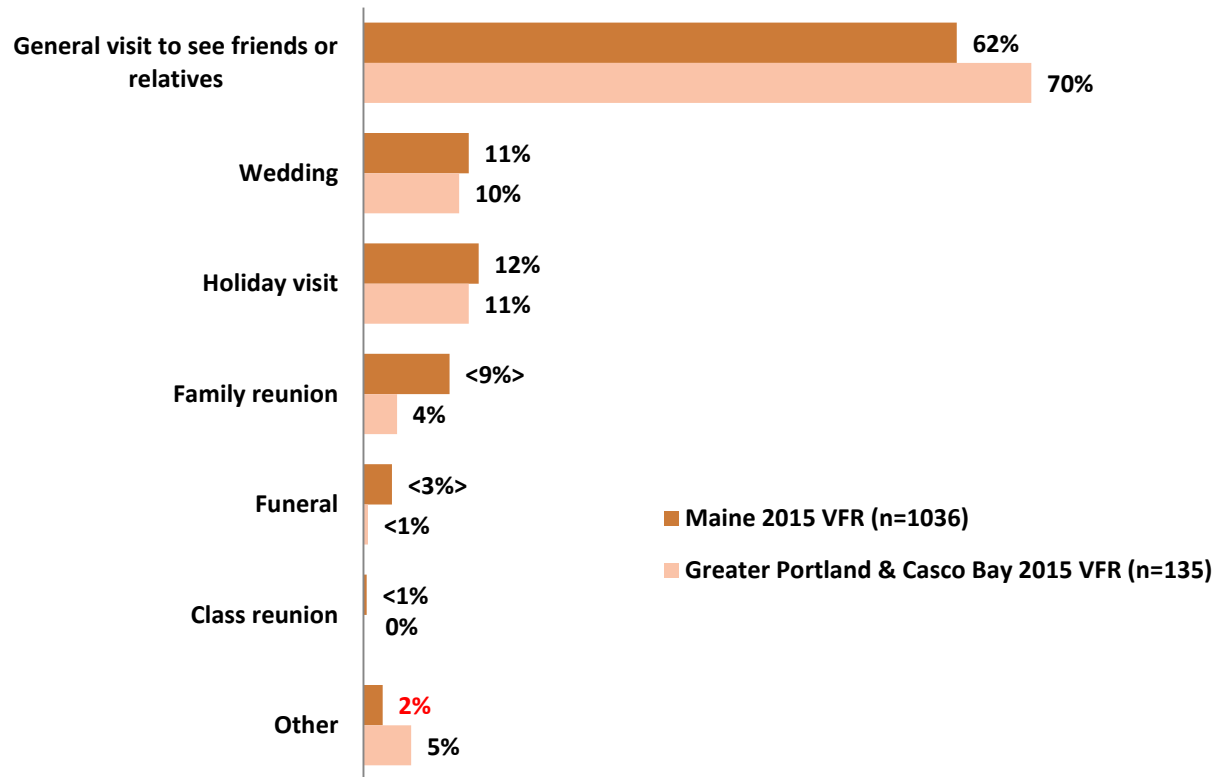
Overnight Visitors: *Trip Experience*



The most common purpose of an overnight VFR trip to the Greater Portland/Casco Bay region is a *general visit to see friends or relatives*.

- Overnight VFR travelers to the Greater Portland and Casco bay region are less likely to be attending a *family reunion* or a *funeral* than overnight VFR travelers to Maine overall.

Primary Purpose of Overnight VFR Trips



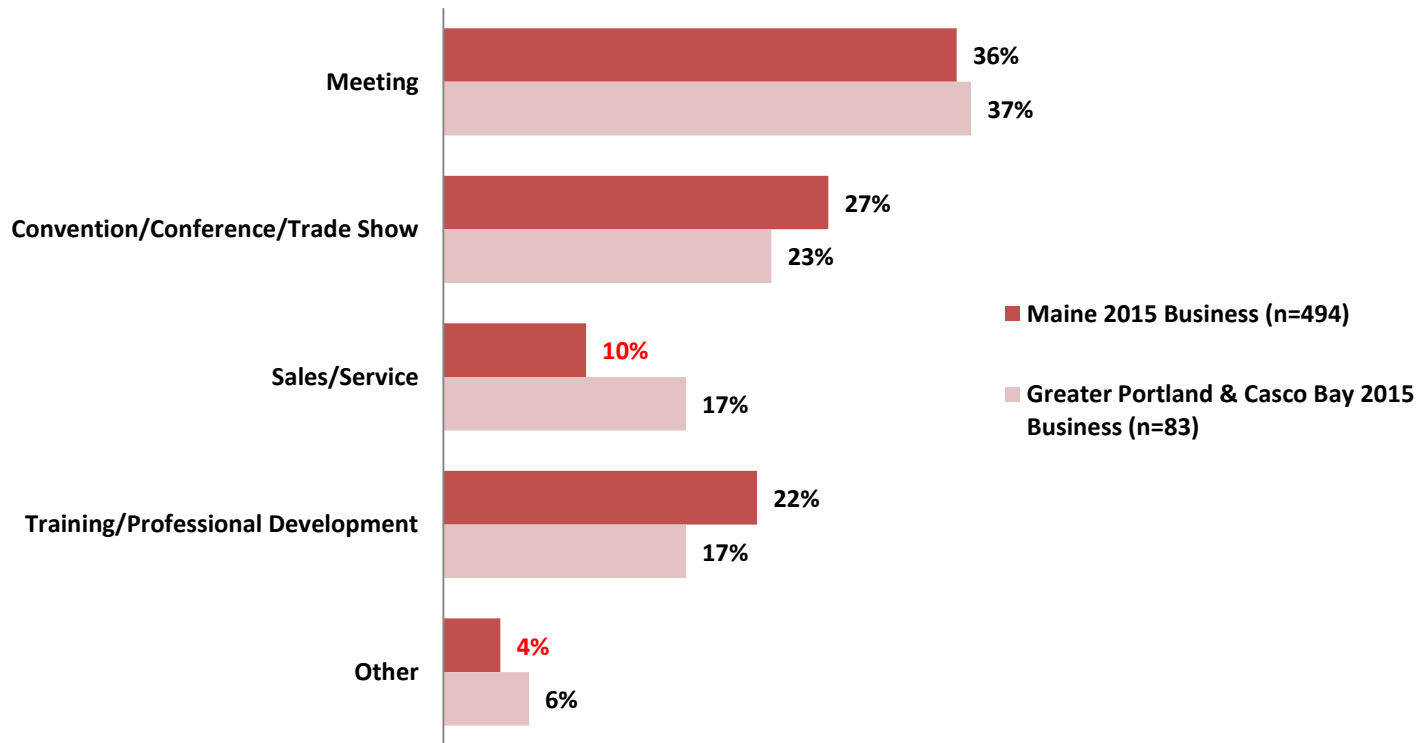
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

< > 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 in the Greater Portland/Casco Bay region are most likely to cite a *meeting* as the primary purpose of their trip.

Primary Purpose of Overnight Business Trips



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

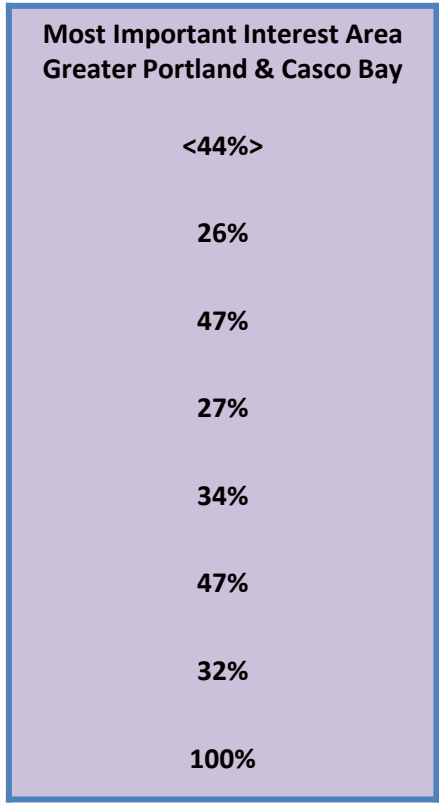
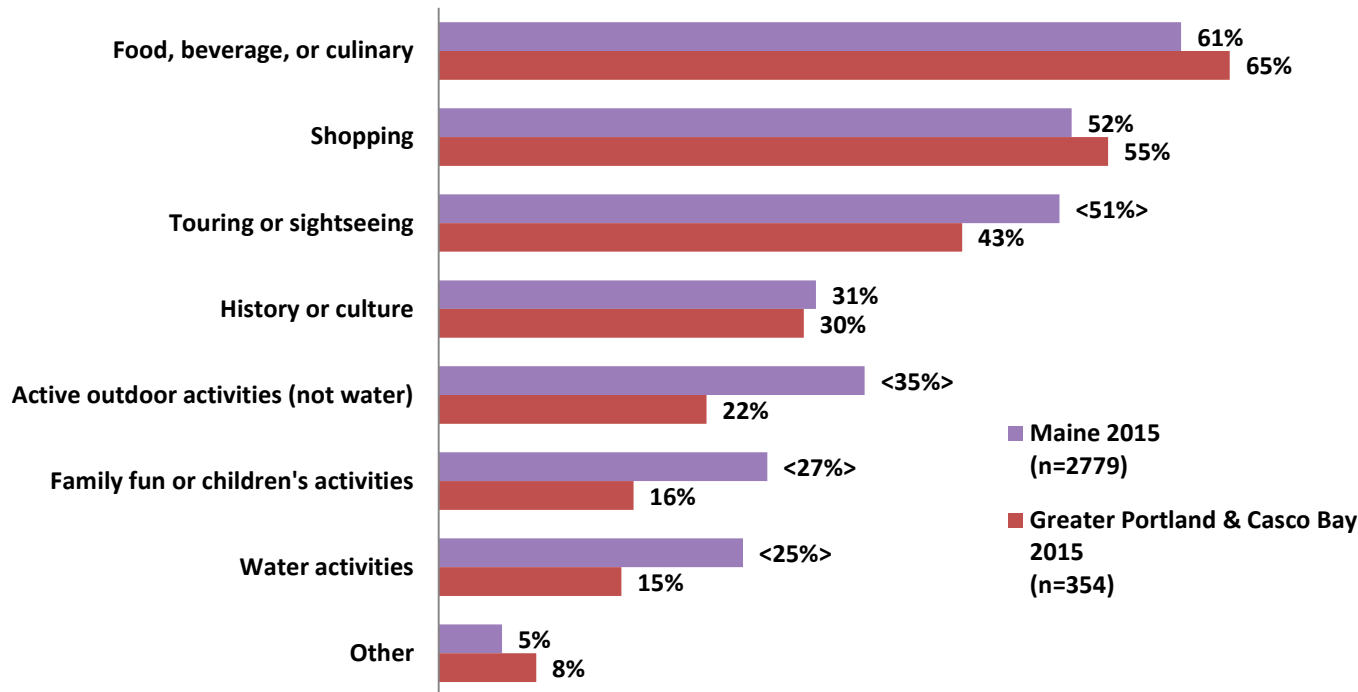
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Similar to Maine visitors in general, *food/beverage/culinary activities* are the most common interest area pursued by overnight visitors to the Greater Portland/Casco Bay region.

- Lower proportions of overnight visitors to the region are interested in *touring or sightseeing, active outdoor activities, family fun/children's activities, and water activities* compared to visitors to the State overall.

2015 Interest Areas



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

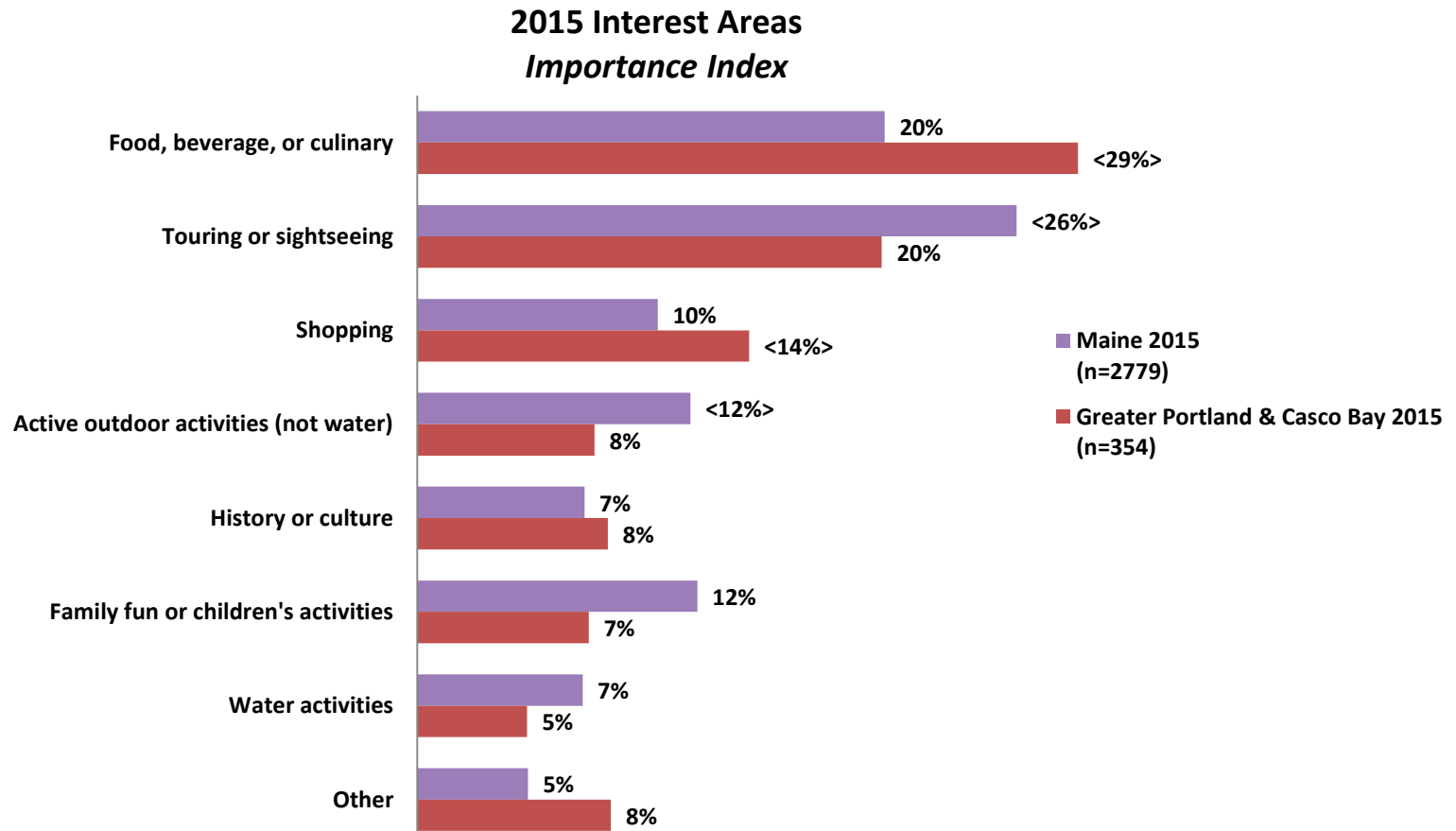
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

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

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

Food/beverage/culinary activities rank highest in the Greater Portland/Casco Bay region when analyzing both interest and importance.

- When looking at both interest and importance, *food/beverage/culinary activities* and *shopping* are more important among visitors to this region than to visitors to the State as a whole. *Touring/sightseeing* and *active outdoor activities* are less important to visitors to the Greater Portland/Casco Bay region.



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.

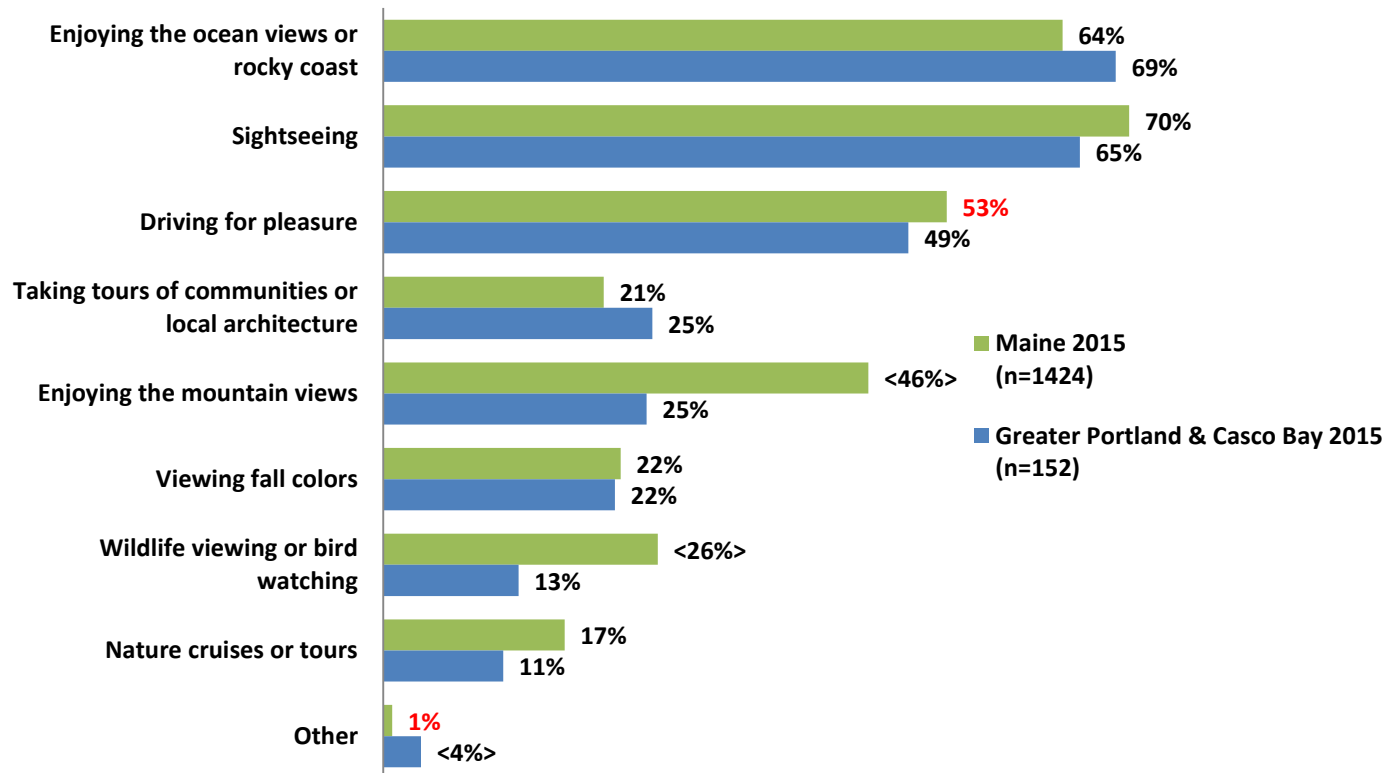
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Enjoying the ocean views or rocky coast and sightseeing are the most common touring/sightseeing activities pursued in this region.

- Compared to overnight visitors to the State of Maine as a whole, lower proportions of overnight visitors to the Greater Portland & Casco Bay region *enjoy the mountain views or spend time viewing wildlife/bird watching.*

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.*

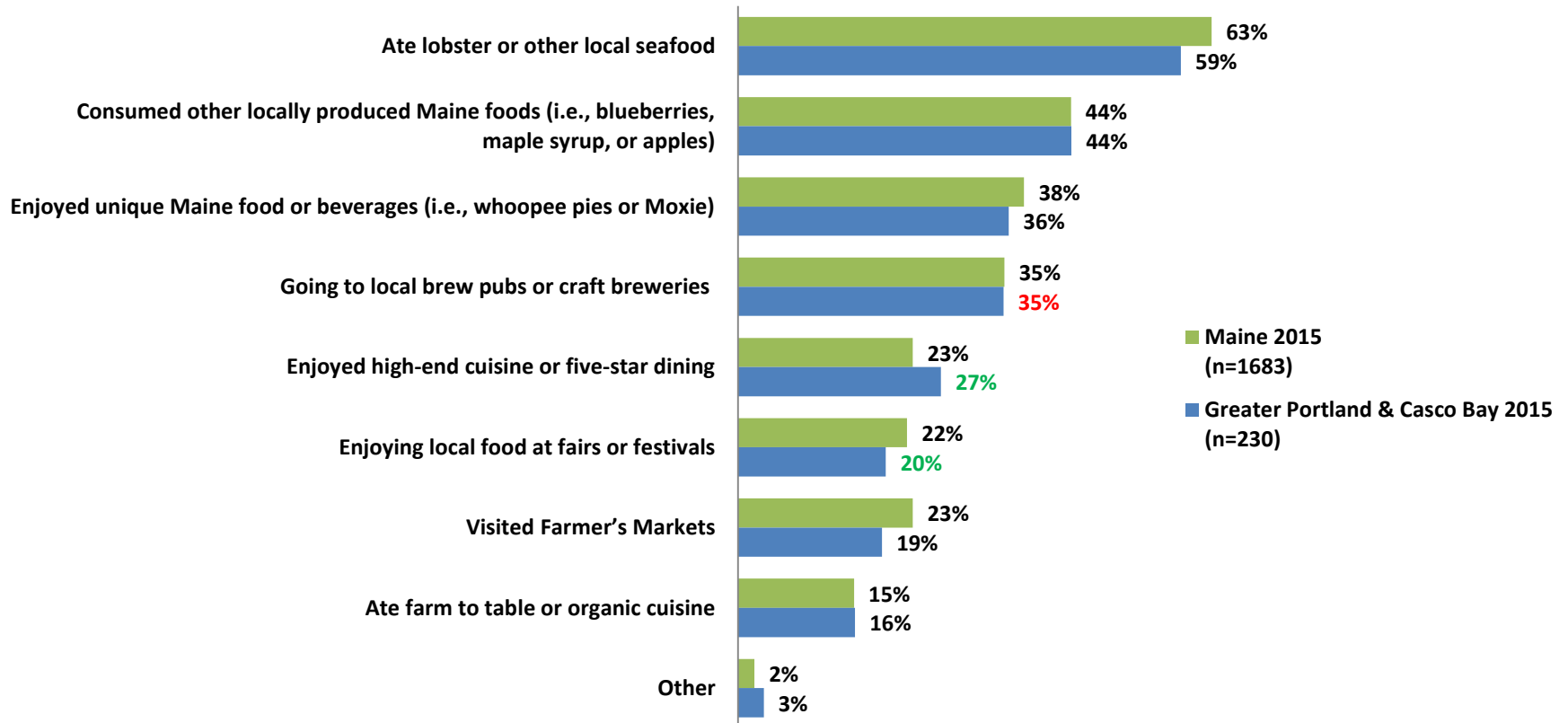
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Eating lobster and other local seafood is the most commonly enjoyed food/beverage/culinary activity in the 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.

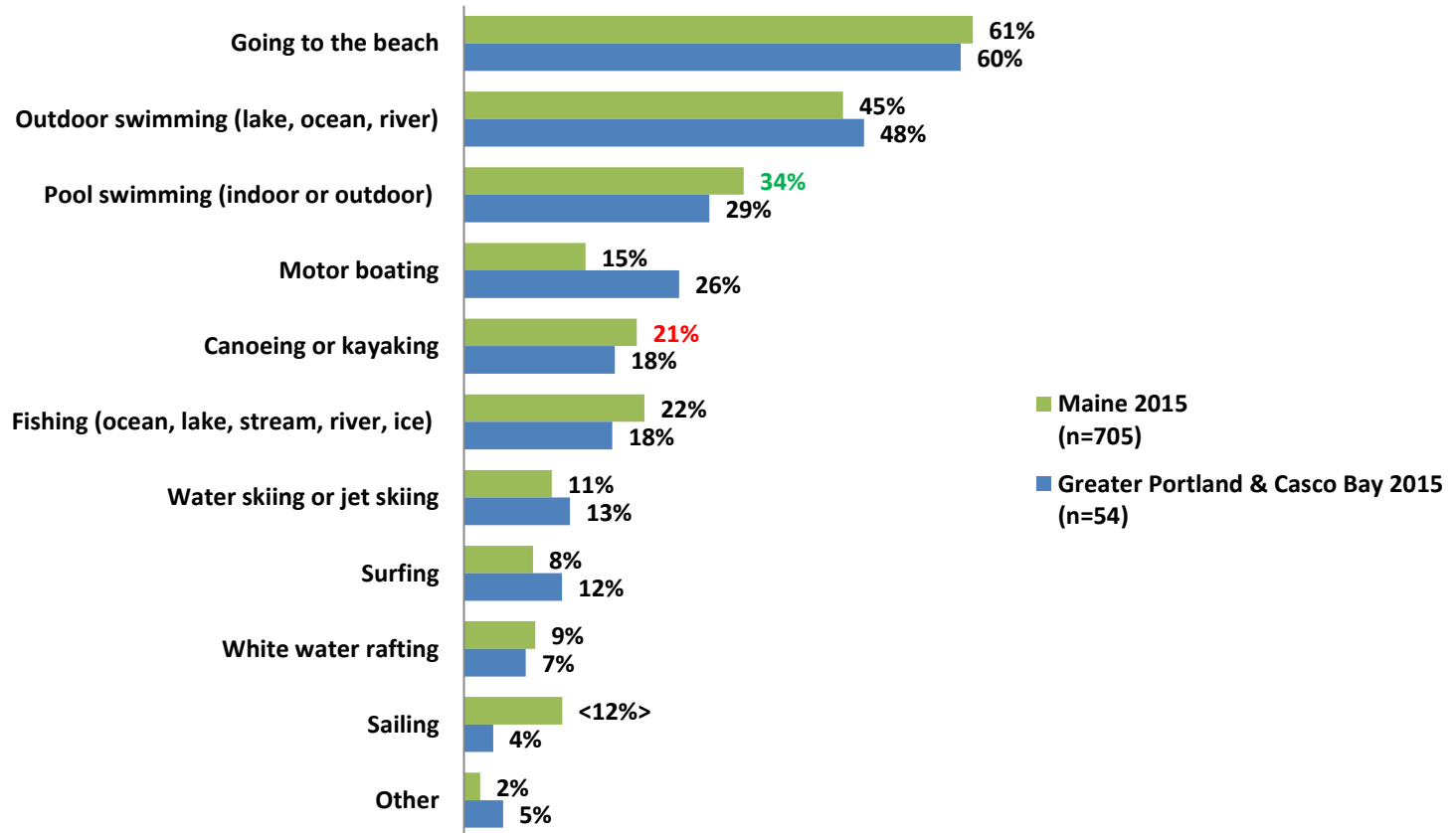
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Nearly two in three overnight visitors to the Greater Portland/ Casco Bay region who participate in water activities *go to the beach*.

Water Activities

Base: Those who report water 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.*

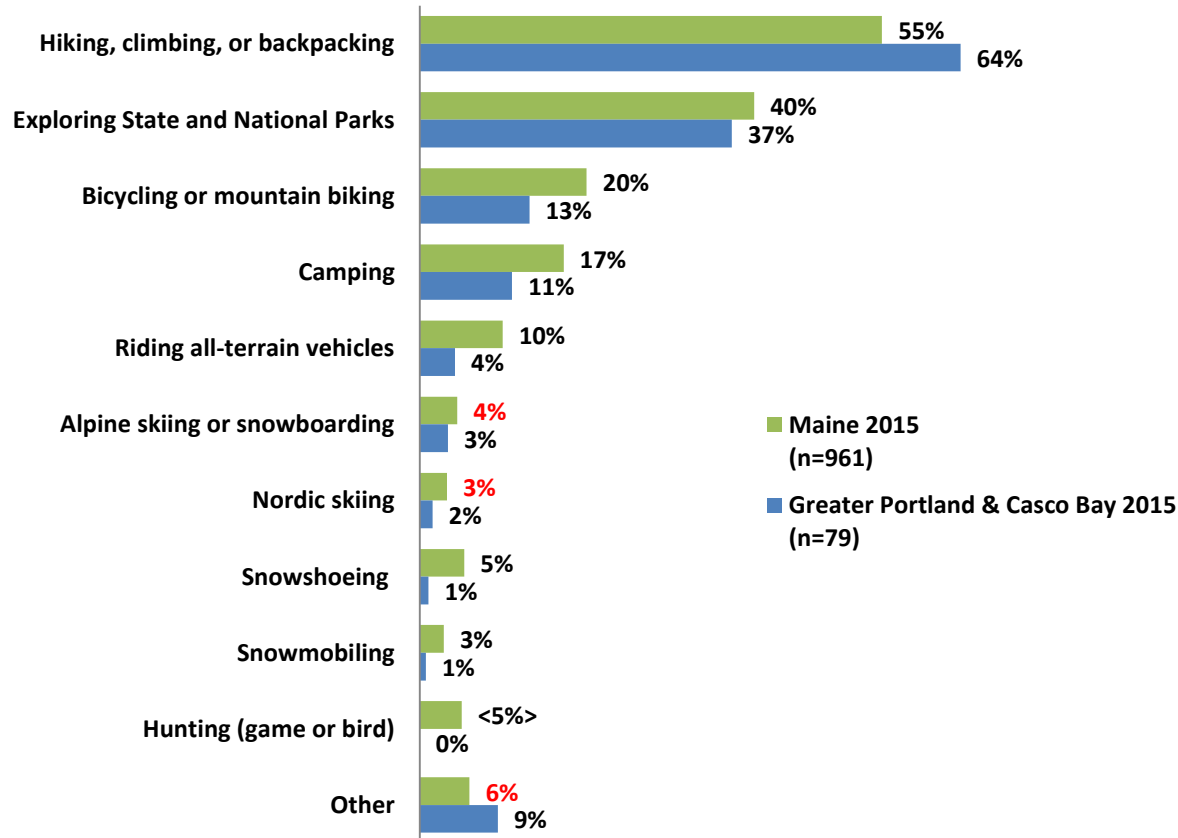
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Two-thirds of overnight visitors interested in active outdoor activities spent time *hiking/climbing/backpacking* while in this region.

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.*

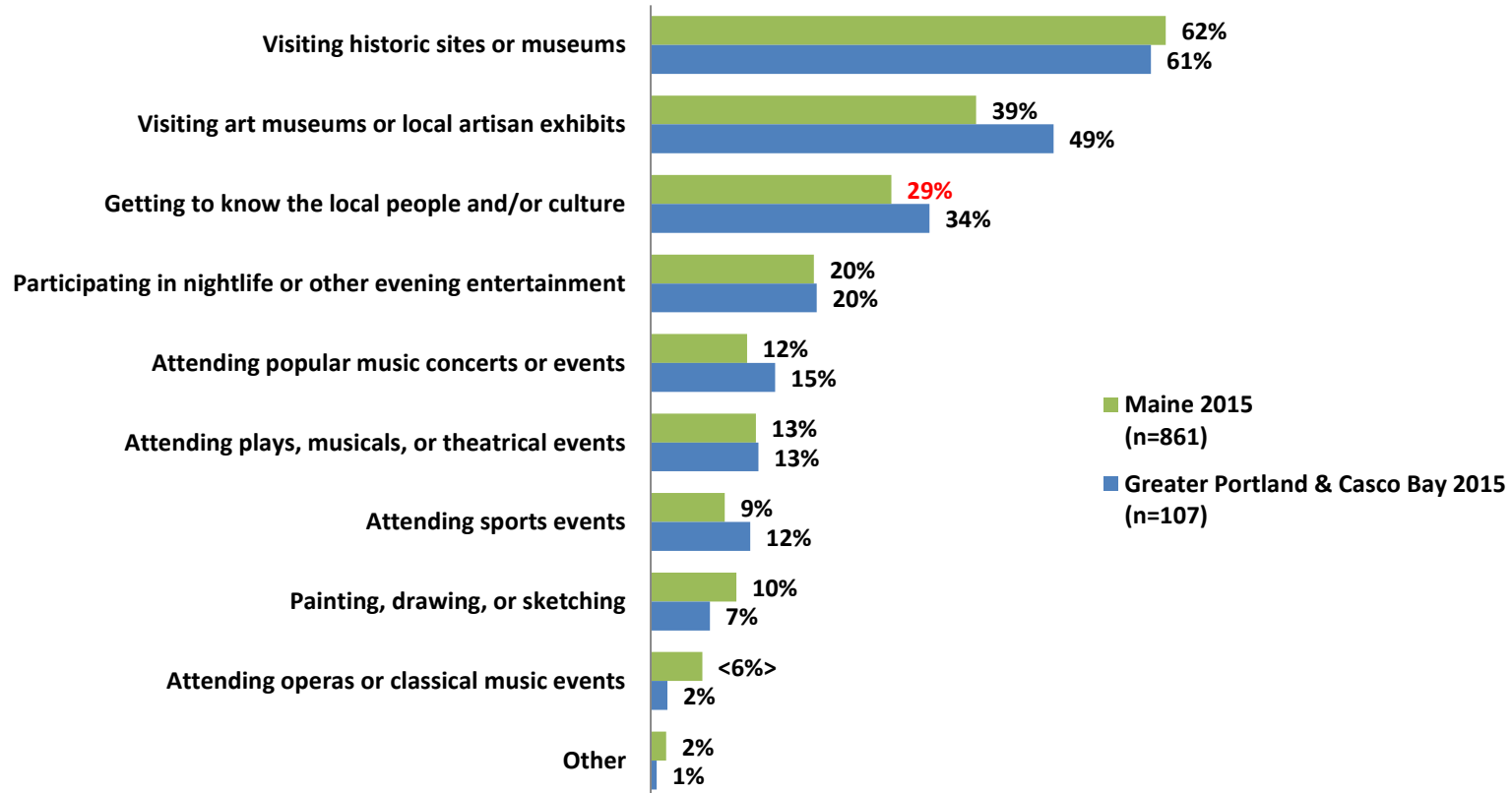
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Nearly two in three visitors interested in history or culture *visit historic sites or museums* while visiting this region.

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.

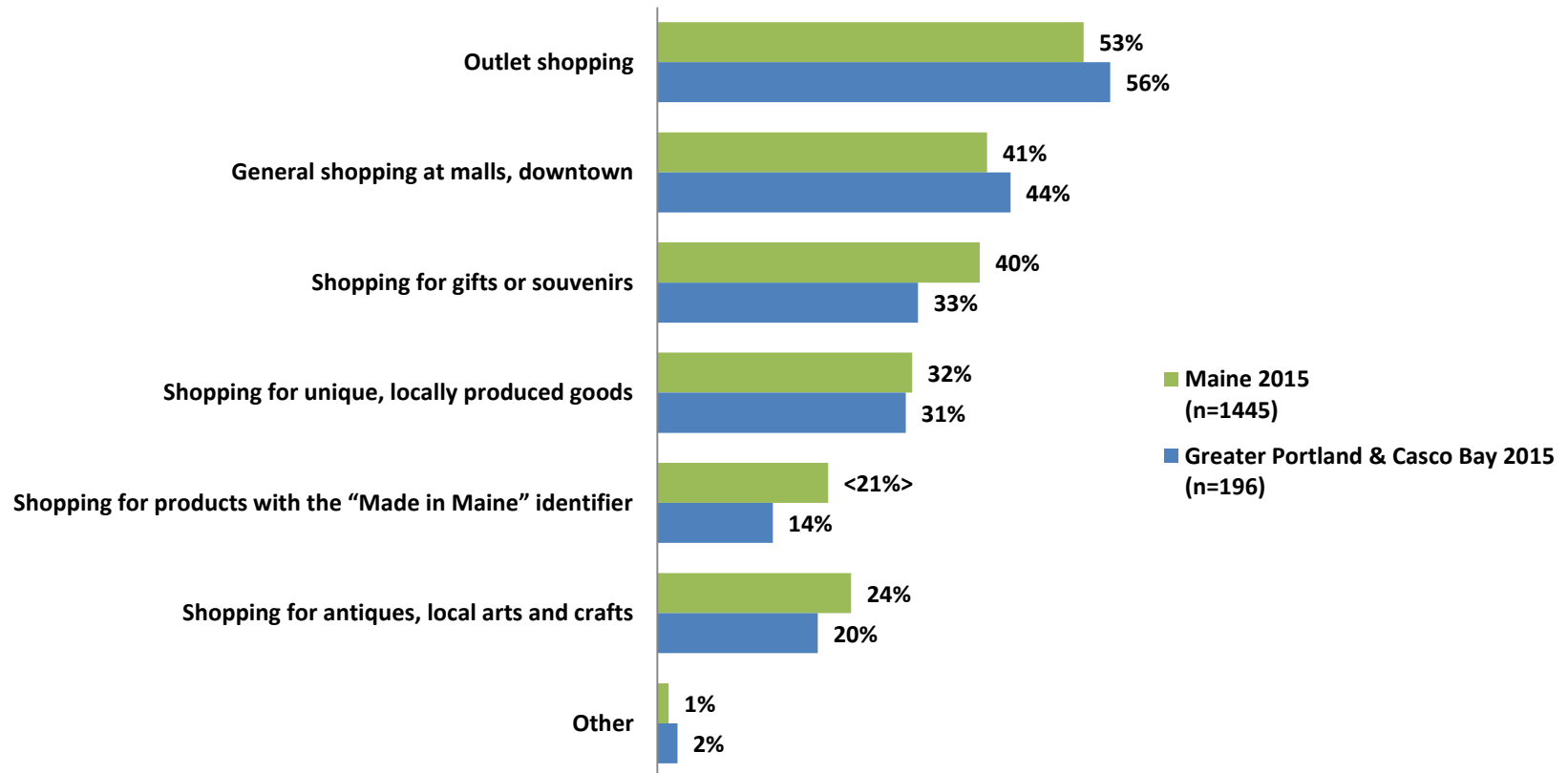
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

More than half of visitors interested in shopping do some outlet shopping while in this region.

- Overnight visitors to the Greater Portland/Casco Bay region are less likely to *shop for products with the “Made in Maine” identifier* than are visitors to Maine overall.

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.

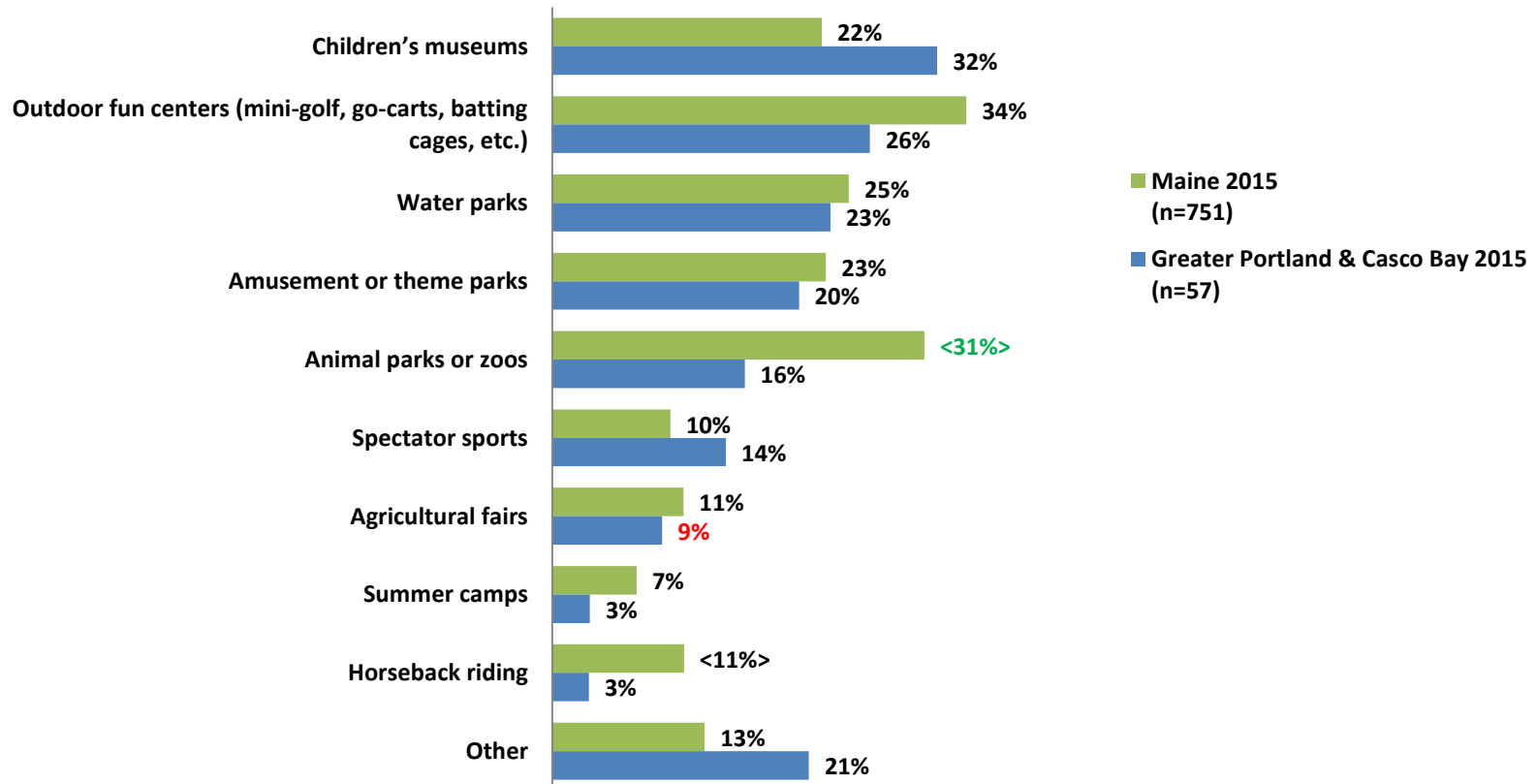
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Children's museums are the most common family fun/children's activity among overnight visitors to the Greater Portland/Casco Bay region.

- Overnight visitors to the Greater Portland/Casco Bay region are less likely to visit *animal parks or zoos* and *go horseback riding* than are visitors to the State as a whole.

Family Fun/Children's Activities

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



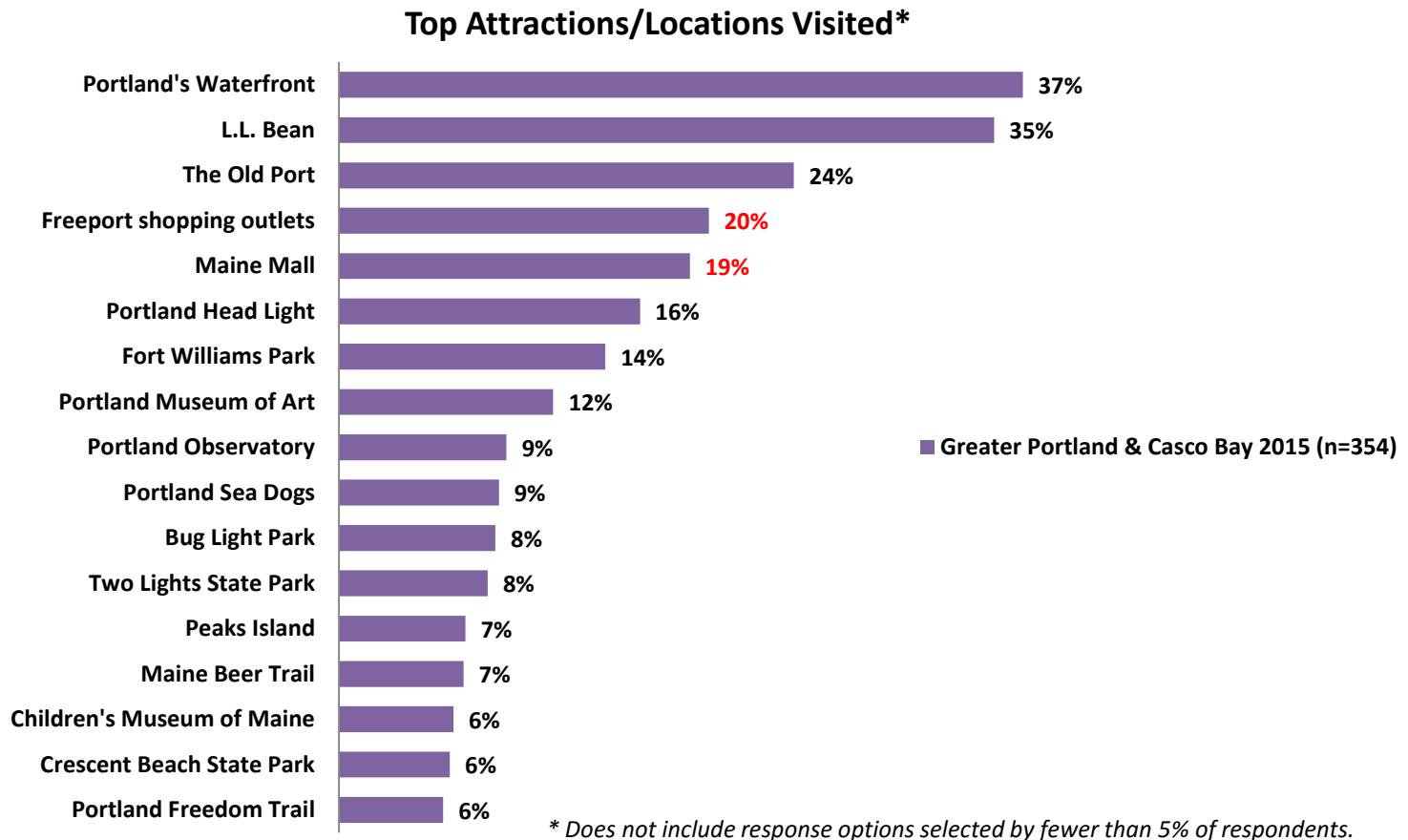
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

< > 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.

Portland's Waterfront and L.L. Bean are the most commonly visited attractions in the Greater Portland/Casco Bay region.

- There was a decrease in the proportion of visitors reporting that they visited the *Freeport shopping outlets* and the *Maine Mall* in 2015 compared to 2014.



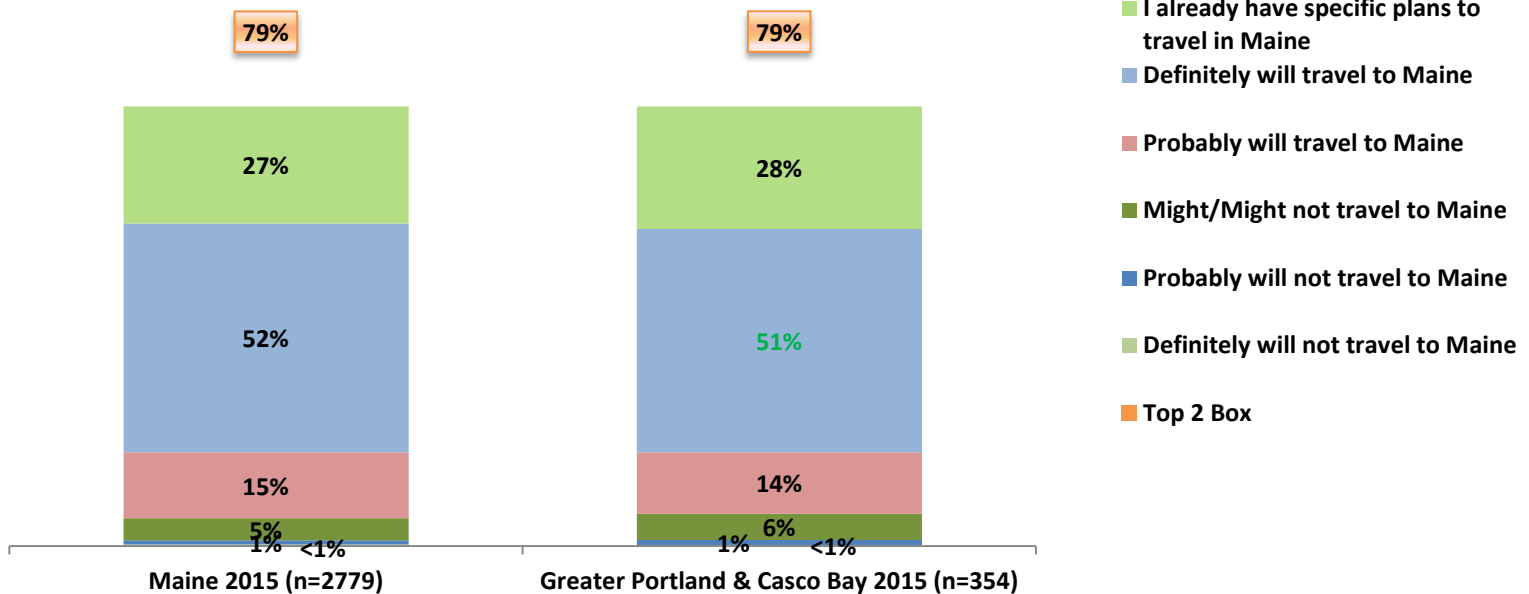
Q26: Within the region you visited, what specific attractions or locations did you visit? (Please check all that apply)

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

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Three in four overnight visitors to the Greater Portland/Casco Bay region intend to return within the next two years.

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?

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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.

Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Greater Portland & Casco Bay area are about 50 years old and earn just under \$110,000 annually. Three in four have a college degree, and over half are employed full-time. Two-thirds are married.
- Compared to day visitors to Maine overall, Greater Portland & Casco Bay day visitors have higher household incomes and are more likely to have a college degree.

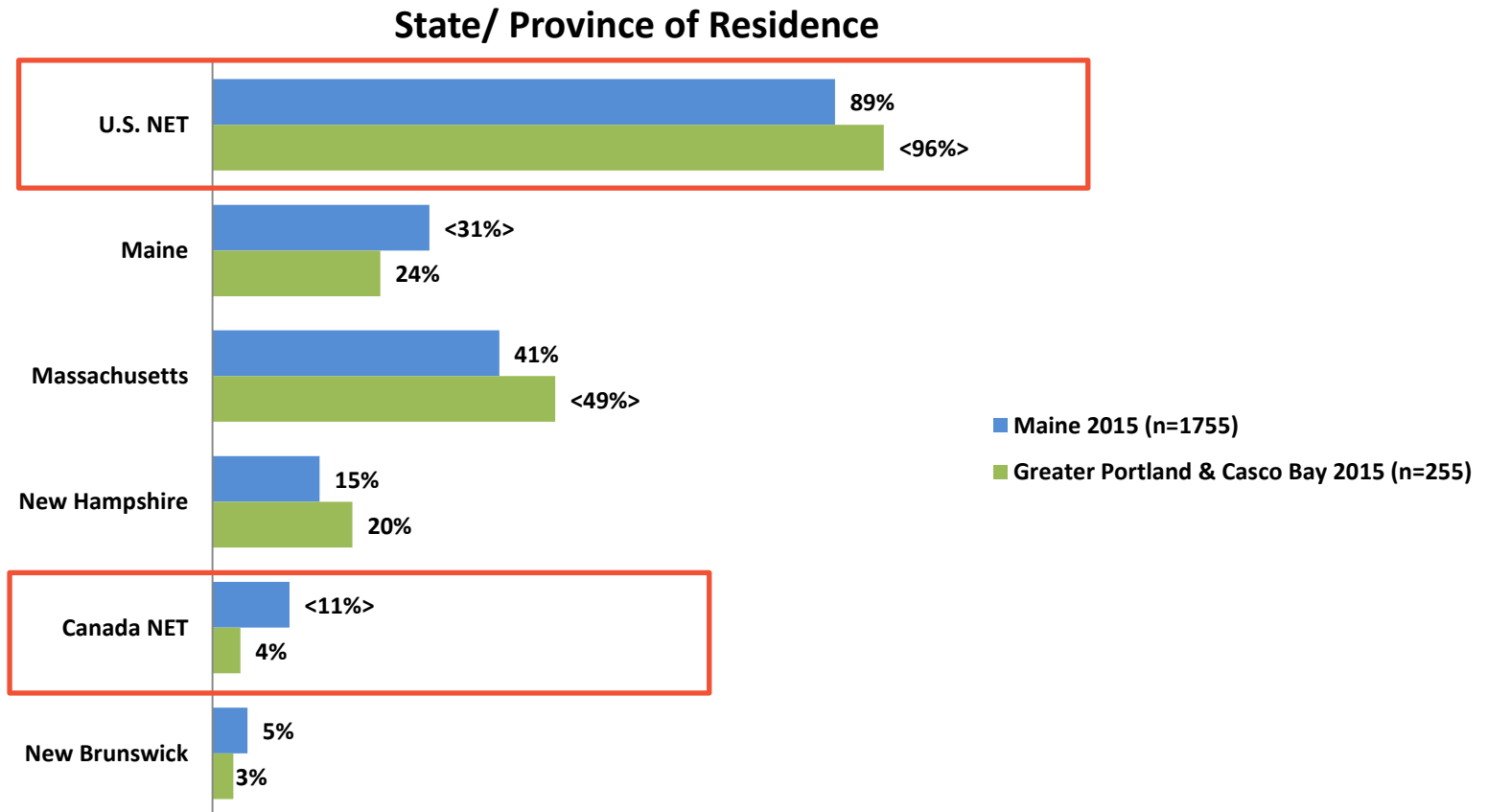
Day Visitors	Maine 2015 (n=1755)	Greater Portland & Casco Bay 2015 (n=255)
Age:		
< 35	25%	19%
35 - 44	16%	15%
45 - 54	21%	23%
55 +	38%	43%
Mean Age (Years)	48.0	49.8
Income:		
< \$50,000	22%	14%
\$50,000 - \$99,999	43%	39%
\$100,000 +	35%	<46%>
Mean Income (Thousands)	\$93,020	<\$109,500>
Female	62%	60%
College Degree or Higher	68%	<76%>
Married	60%	64%
Employed Full Time	55%	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.

Almost all visitors to the Greater Portland/Casco Bay region are from the United States (96%).

- Half of day visitors to the Greater Portland & Casco Bay area are from Massachusetts, significantly more than the proportion of visitors to Maine overall from Massachusetts.



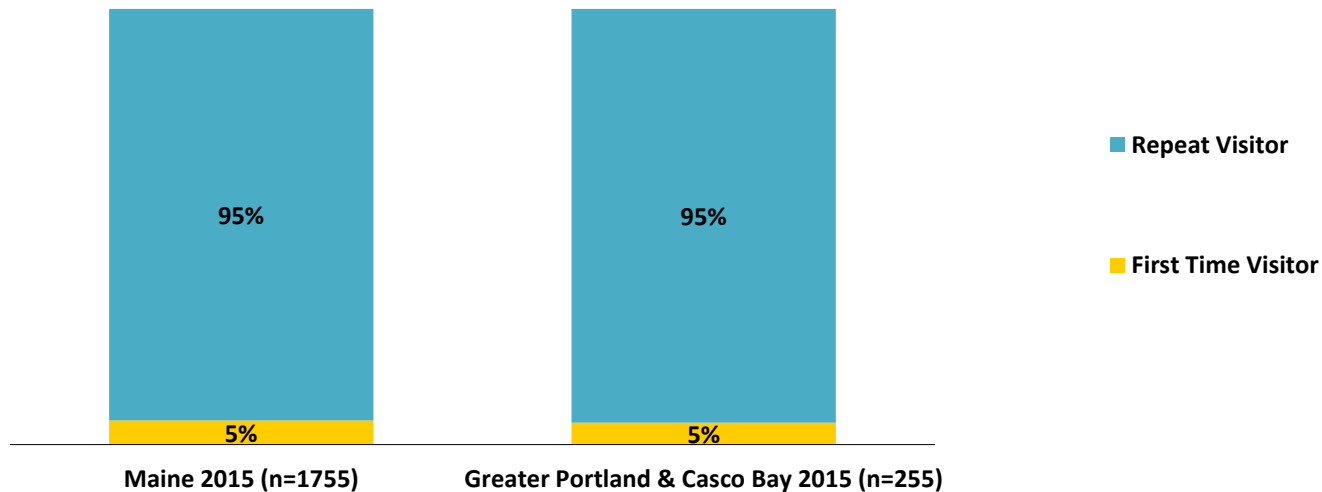
Q2. In what State or Province do you reside?

< > 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.

The vast majority of day visitors to the Greater Portland/ Casco Bay region are repeat visitors.

Repeat vs. First Time Visitors



Q10. Was this your first trip to Maine?

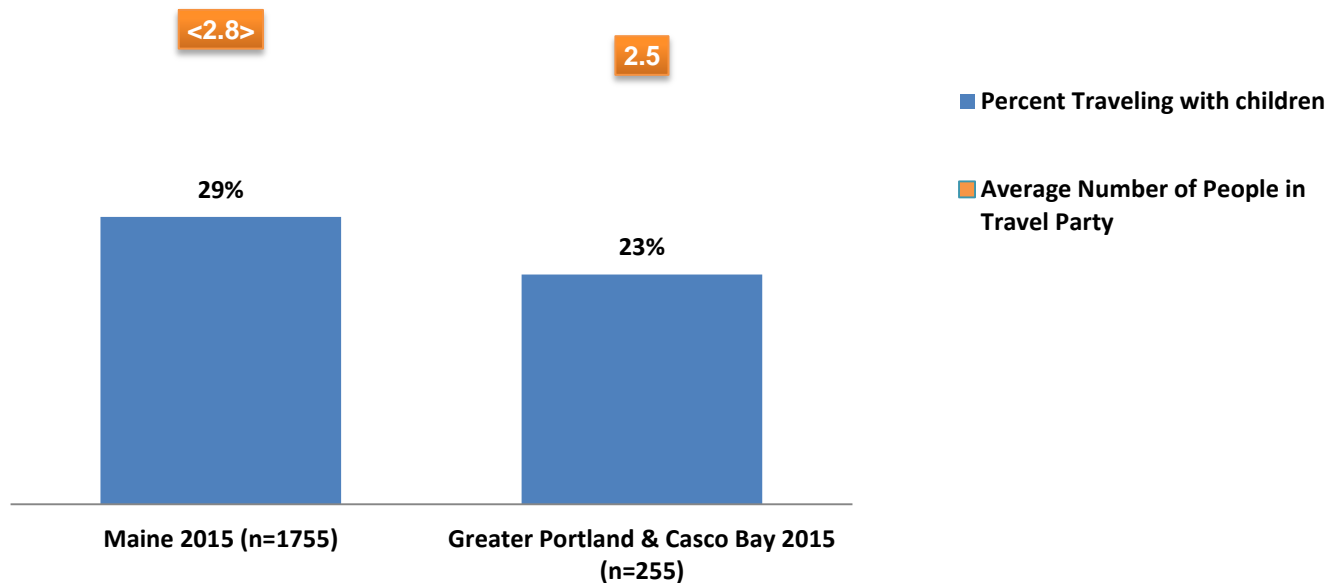
Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

< > 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.

Day visitors to the Greater Portland/Casco Bay region travel in smaller parties when compared to visitors to the State overall.

Travel Party Composition



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

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

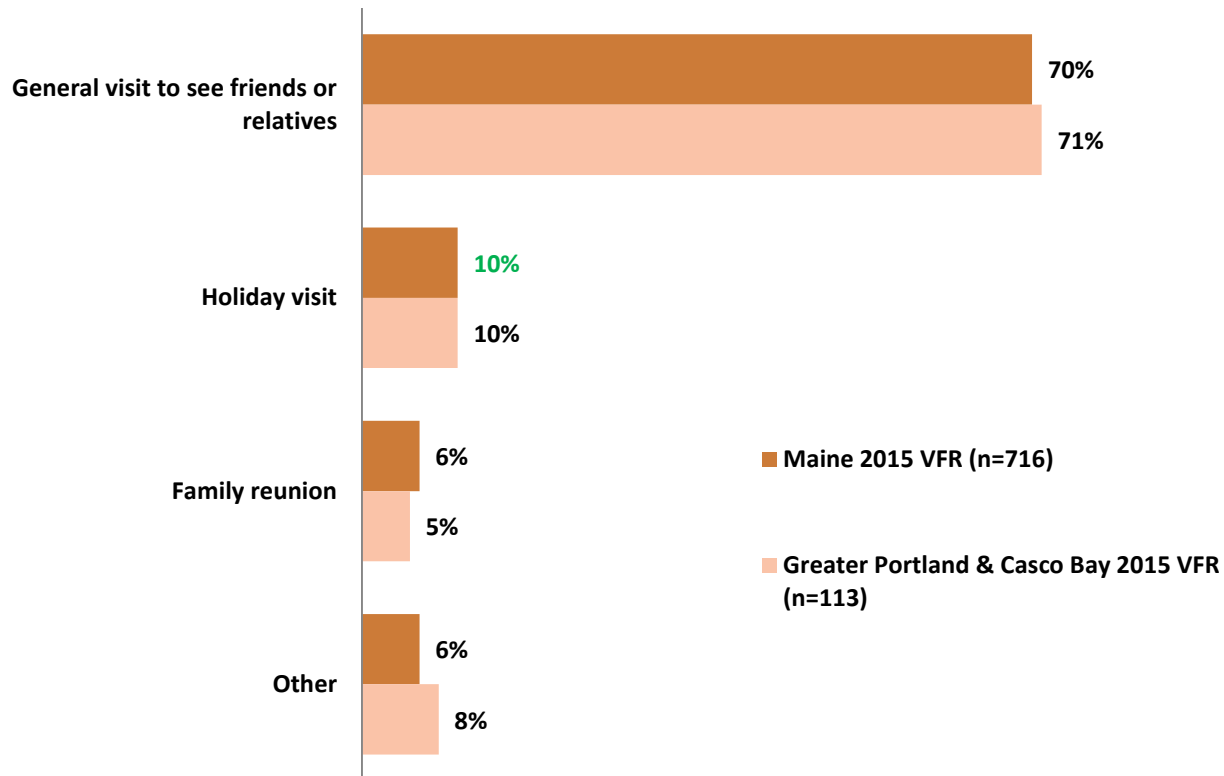
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Seven in ten VFR day visitors to the Greater Portland/Casco Bay region cite a *general visit to friends or relatives* as the primary purpose of their VFR trip.

Primary Purpose of Day VFR Trips



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

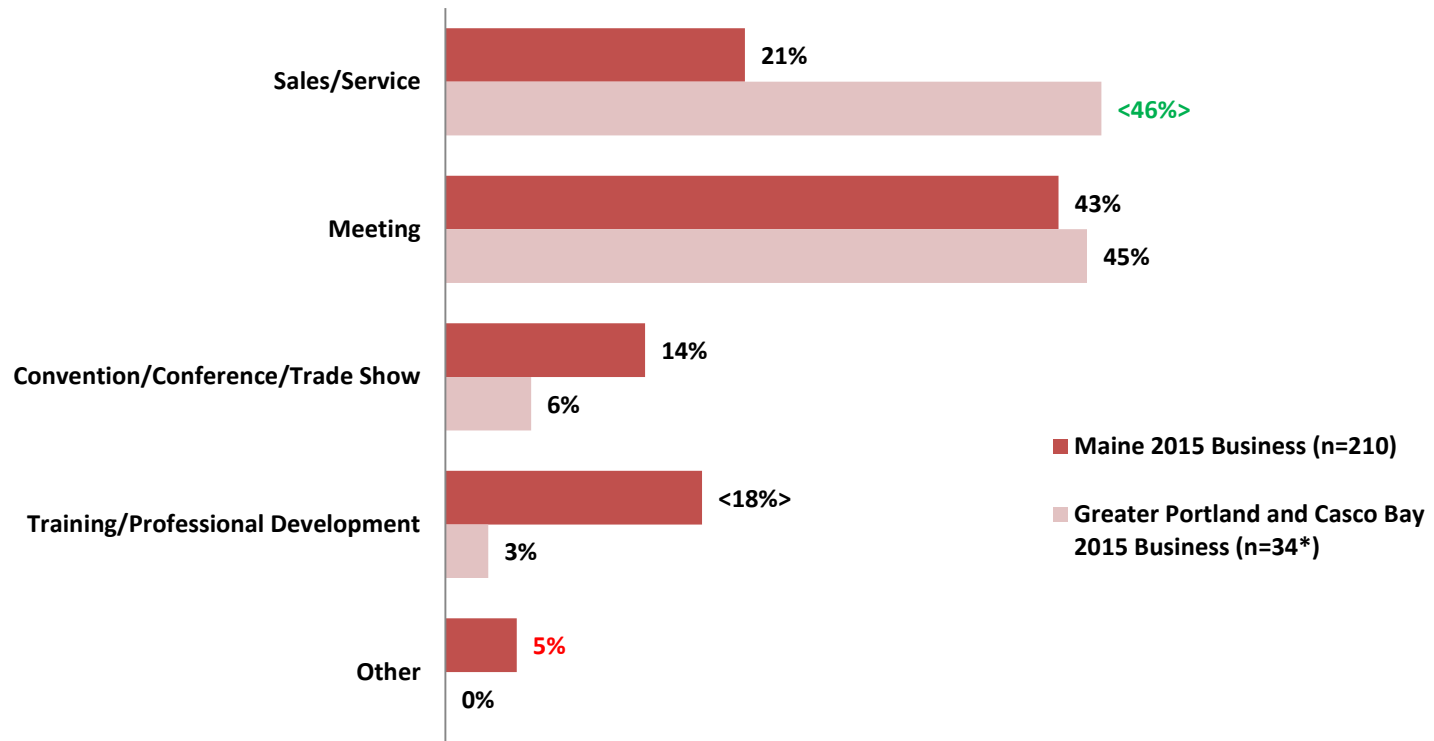
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Among business travelers, *sales and service* is the most frequently mentioned reason for a day trip to this region.

- The proportion of business travelers who come to the region for a *sales/service* trip increased in 2015 and is a greater proportion than for business day visitors coming to the State overall for *sales/service*.

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.

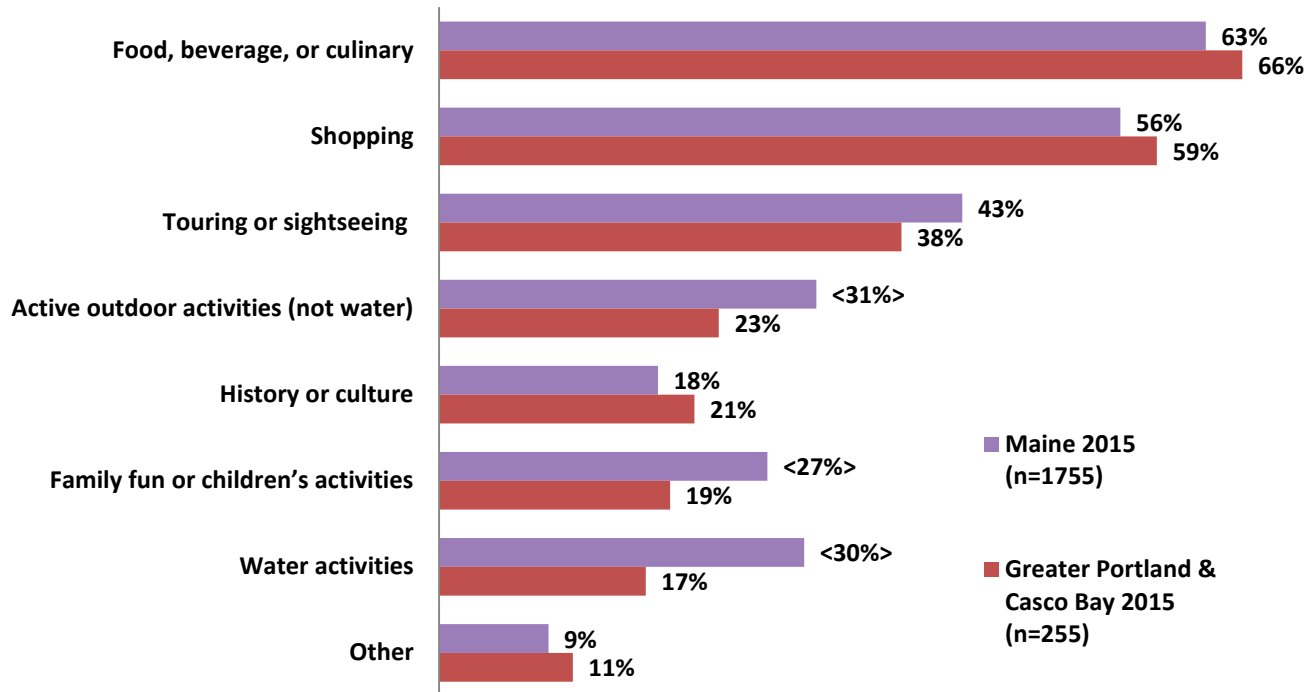
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

Food/beverage/culinary activities and shopping are the two most common interest areas of day visitors to the region.

- Greater Portland/Casco Bay region day visitors are less likely than visitors to the State as a whole to be interested in *active outdoor activities, family fun/children’s activities, and water activities.*

2015 Interest Areas



Most Important Interest Area Greater Portland & Casco Bay
<50%>
28%
31%
22%
31%
63%
32%
94%

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

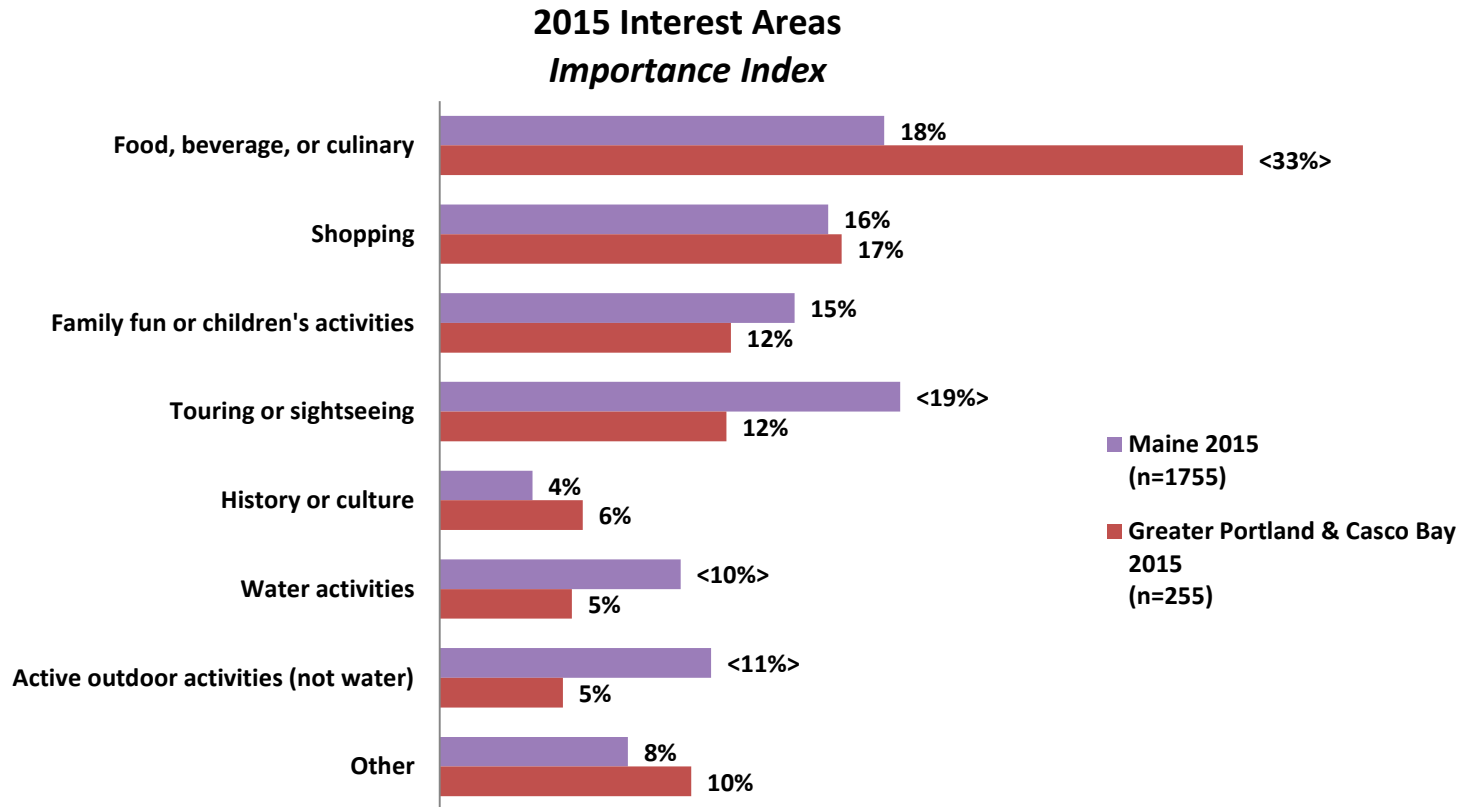
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

< > 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.

When analyzing both interest and importance in deciding to visit, food/beverage/culinary activities rank highest among day visitors to Greater Portland/ Casco Bay.

- When looking at both interest and importance, *food/beverage/culinary activities* are more important among day visitors to the Greater Portland/Casco Bay region than to day visitors to the State as a whole. *Touring/sightseeing, water activities, and active outdoor activities* are all less important to visitors to this region.



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. 34

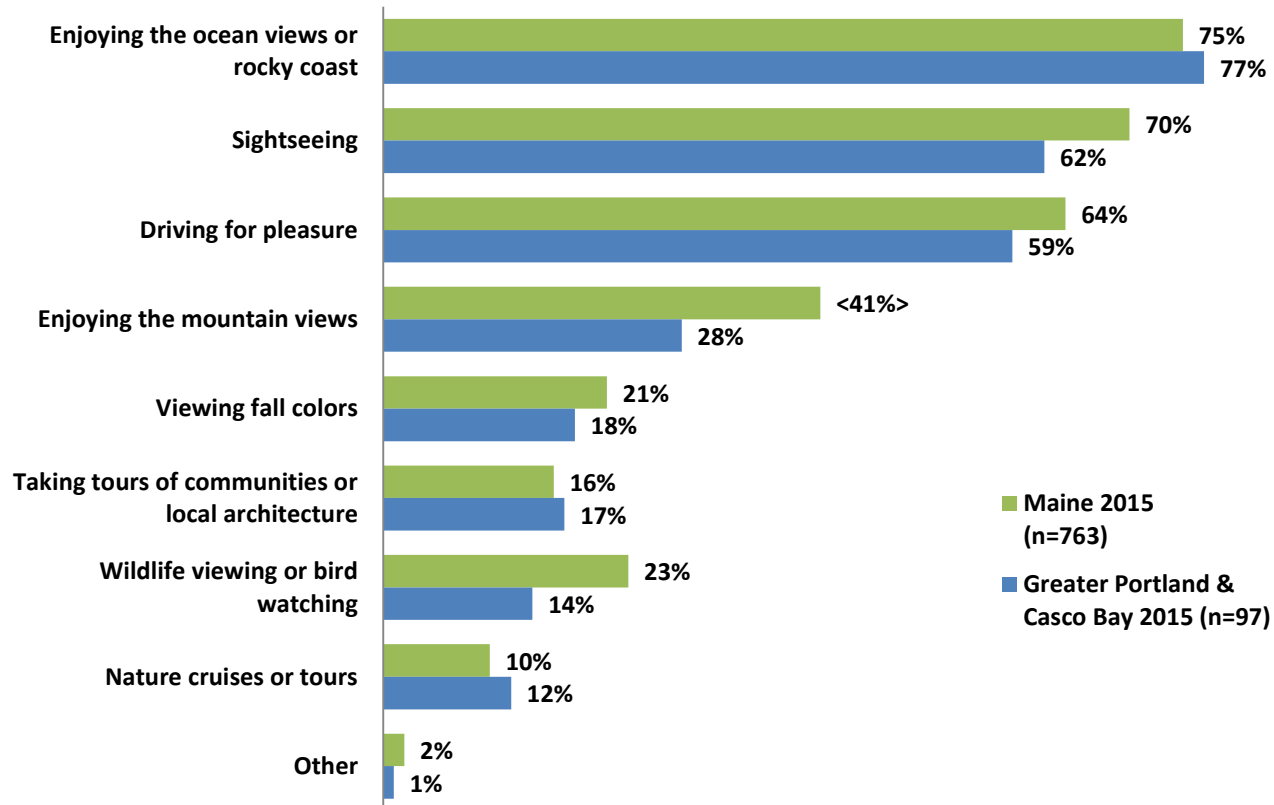
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Among day visitors to the region interested in touring or sightseeing, the most common activity is *enjoying the ocean views or rocky coast*.

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.

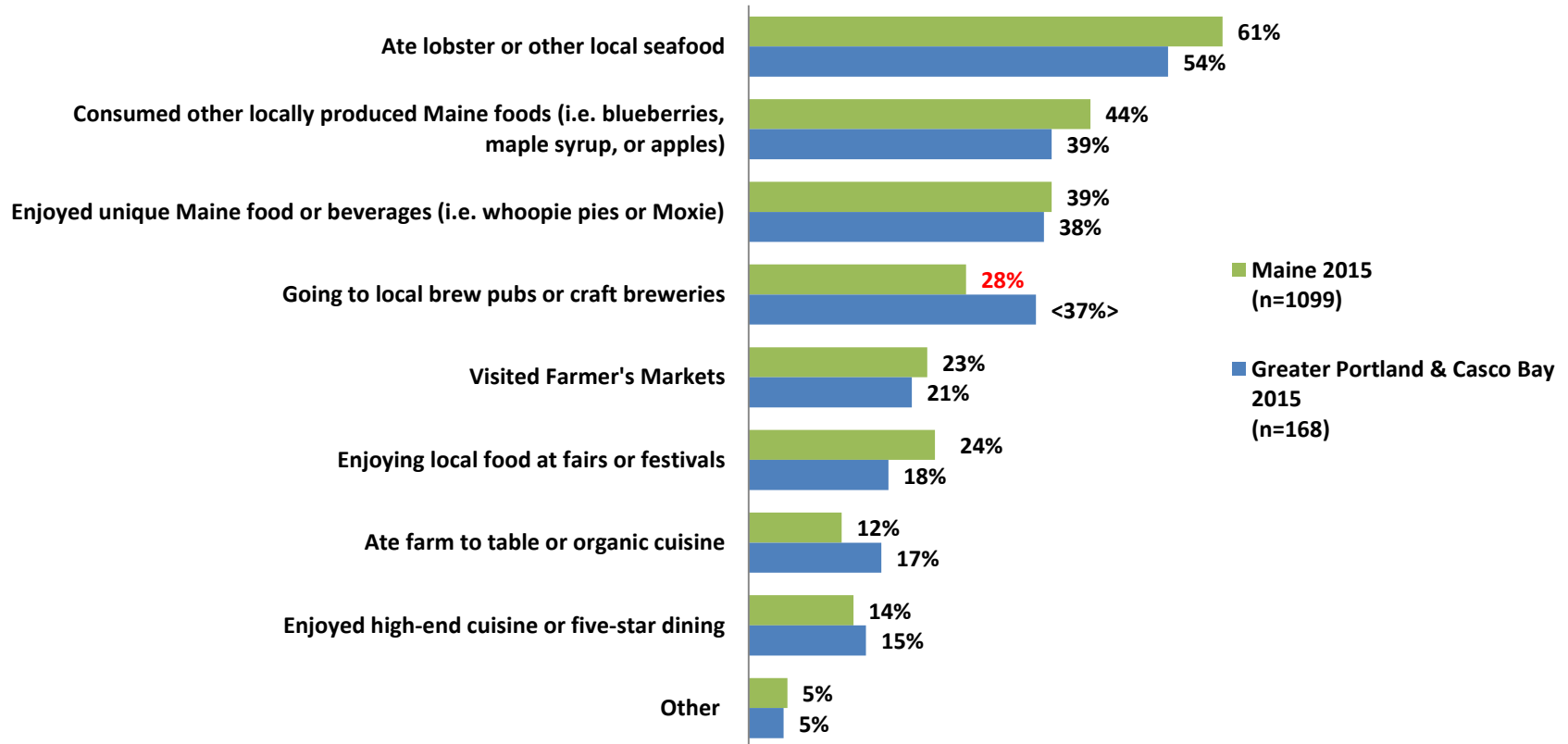
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Over half of day visitors to the region interested in food/beverage/ culinary activities *eat lobster/other local seafood* while visiting.

- Day visitors to the Greater Portland/Casco Bay area are more likely than visitors to the State overall to *spend time at a local brew pub or craft brewery.*

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.*

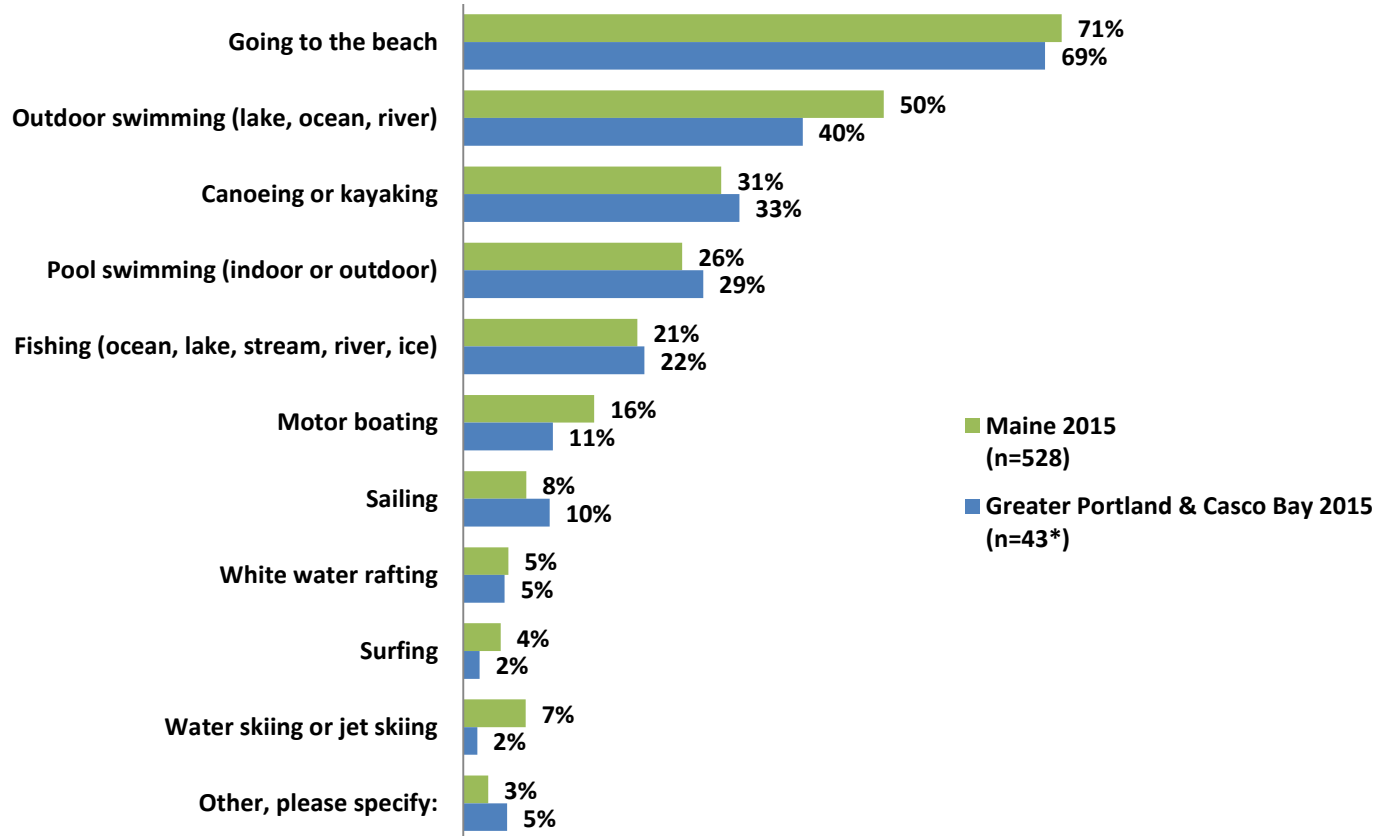
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Among day visitors to the Greater Portland & Casco Bay region who are interested in water activities, two-thirds go 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.

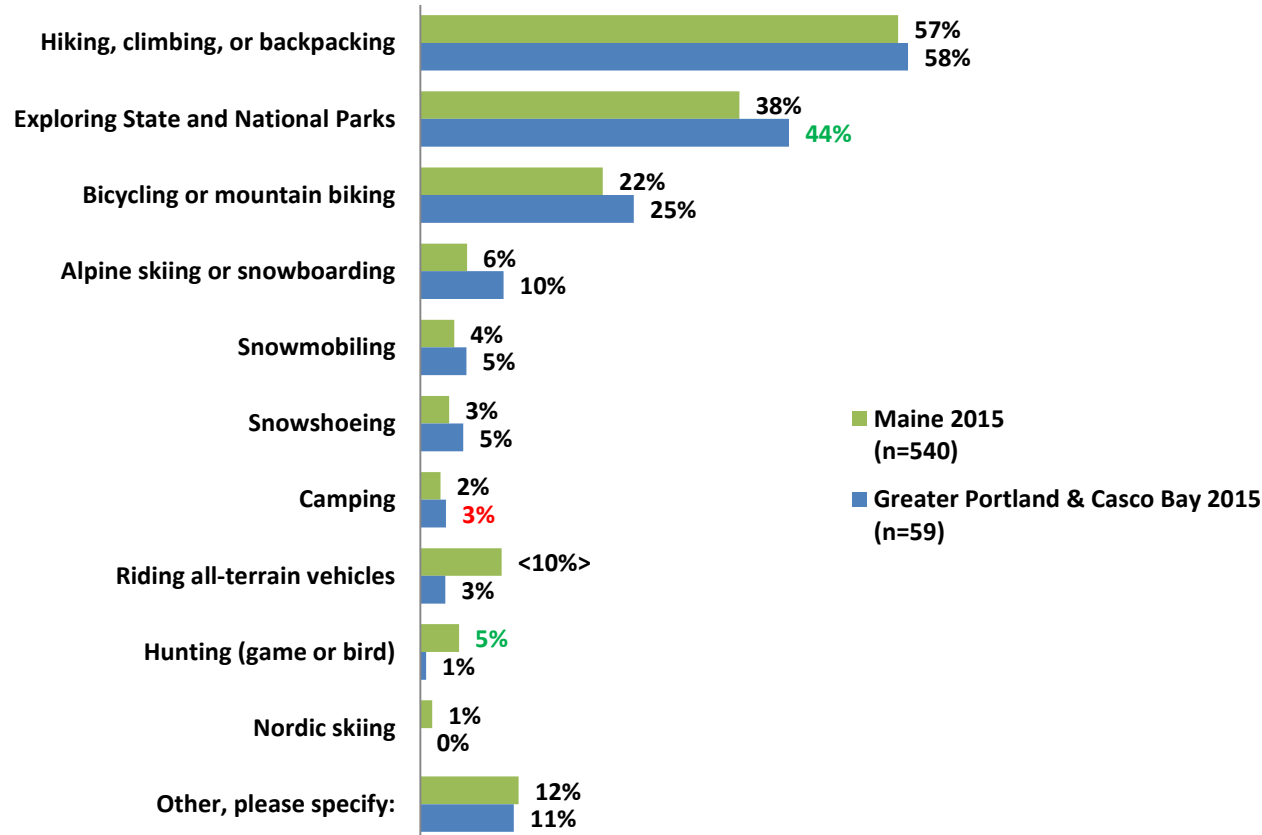
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

More than half of all day visitors to Greater Portland & Casco Bay who are interested in active outdoor activities go *hiking/climbing/backpacking*.

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.*

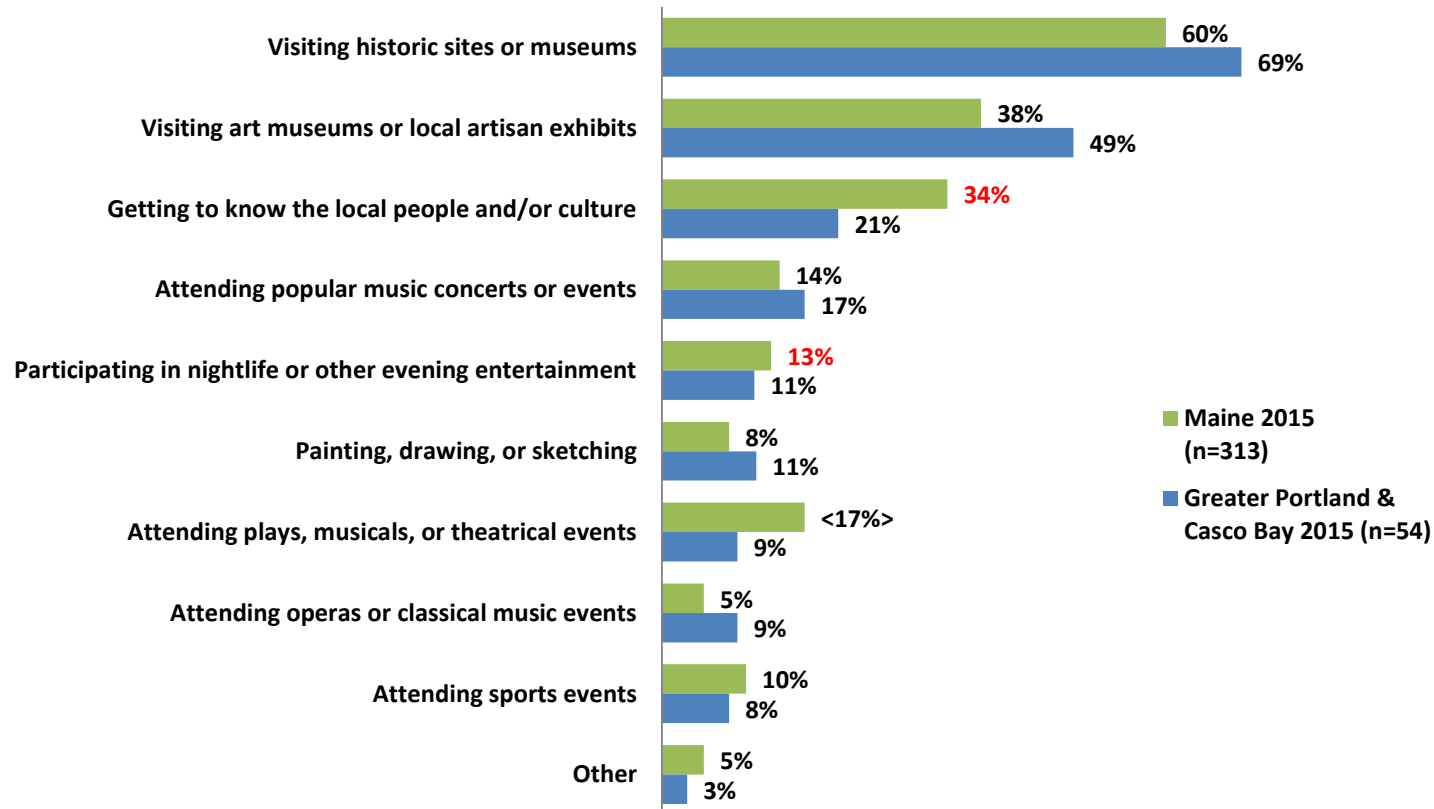
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Visiting historic sites/museums is the most common history or culture activity among day visitors to the Greater Portland/Casco Bay region.

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.

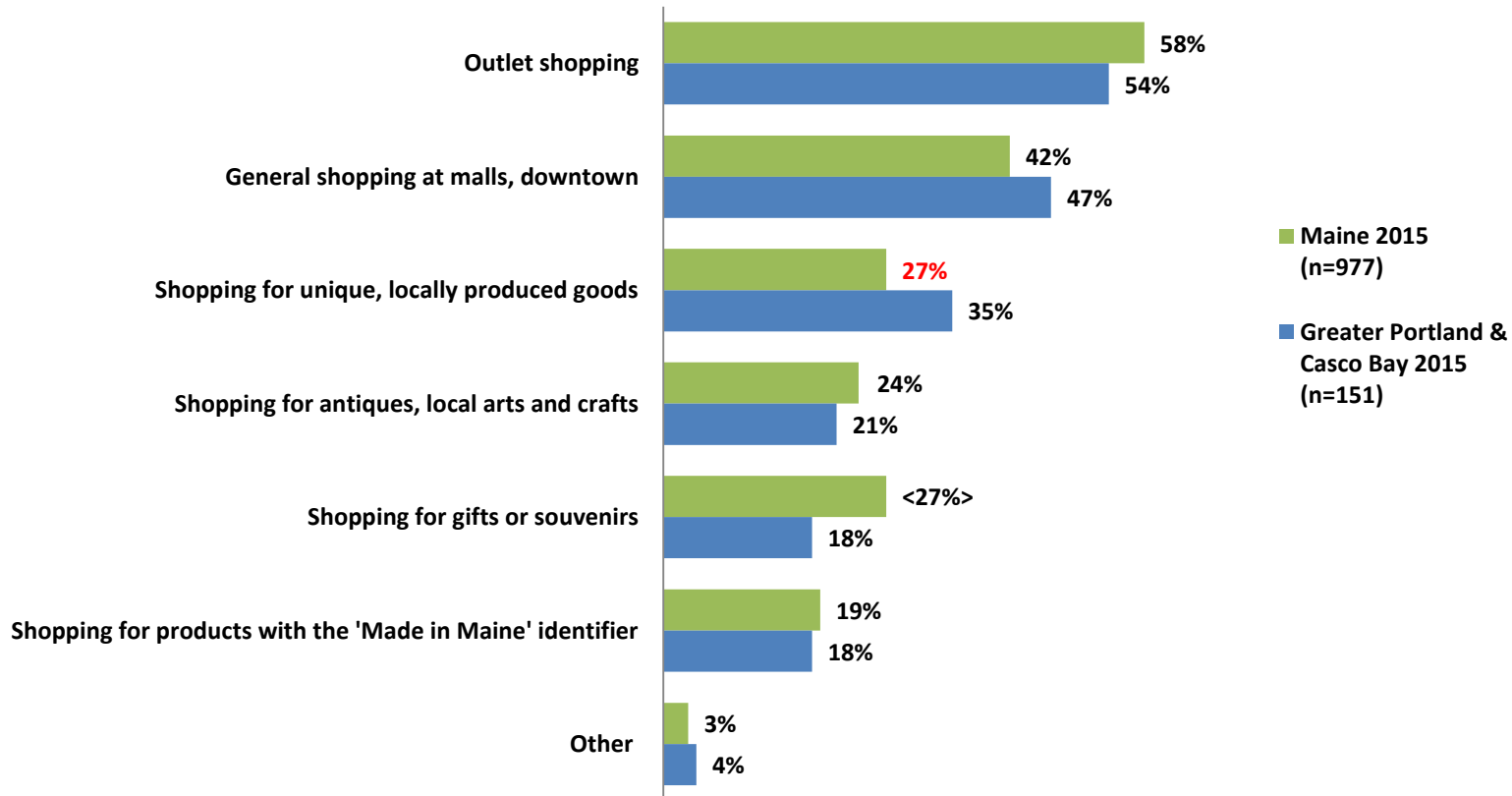
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Greater Portland & Casco Bay day visitors interested in shopping are most likely to do some *outlet shopping* while in the region.

- Day visitors to the Greater Portland/Casco Bay area are less likely than visitors to the State overall to *shop for gifts or souvenirs*.

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.

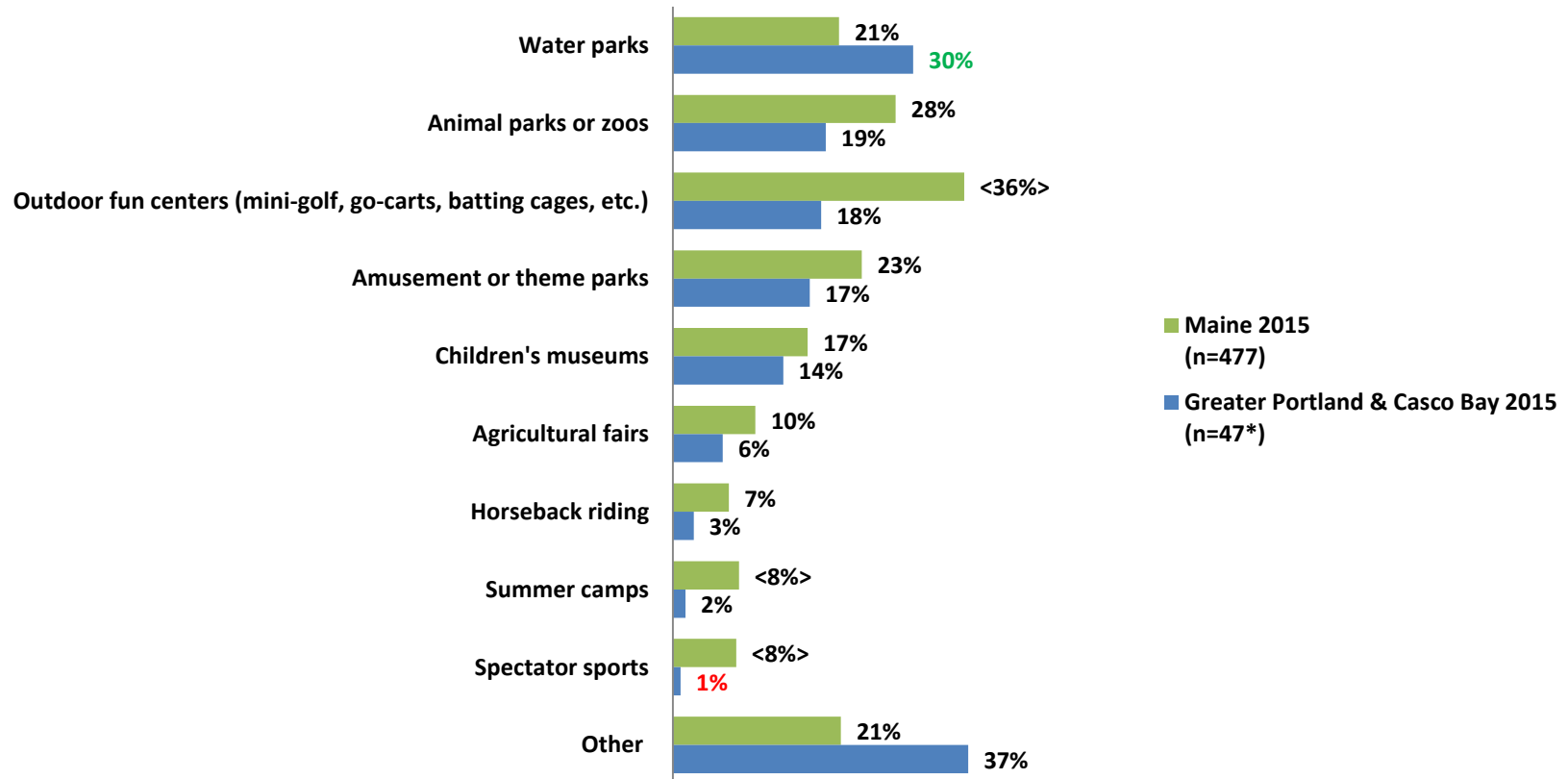
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day visitors to this region who are interested in family fun/children's activities participate in a variety of activities.

- Day visitors to the Greater Portland & Casco Bay region are less likely than visitors to the State overall to spend time at *outdoor fun centers*.

Family Fun/Children's Activities

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



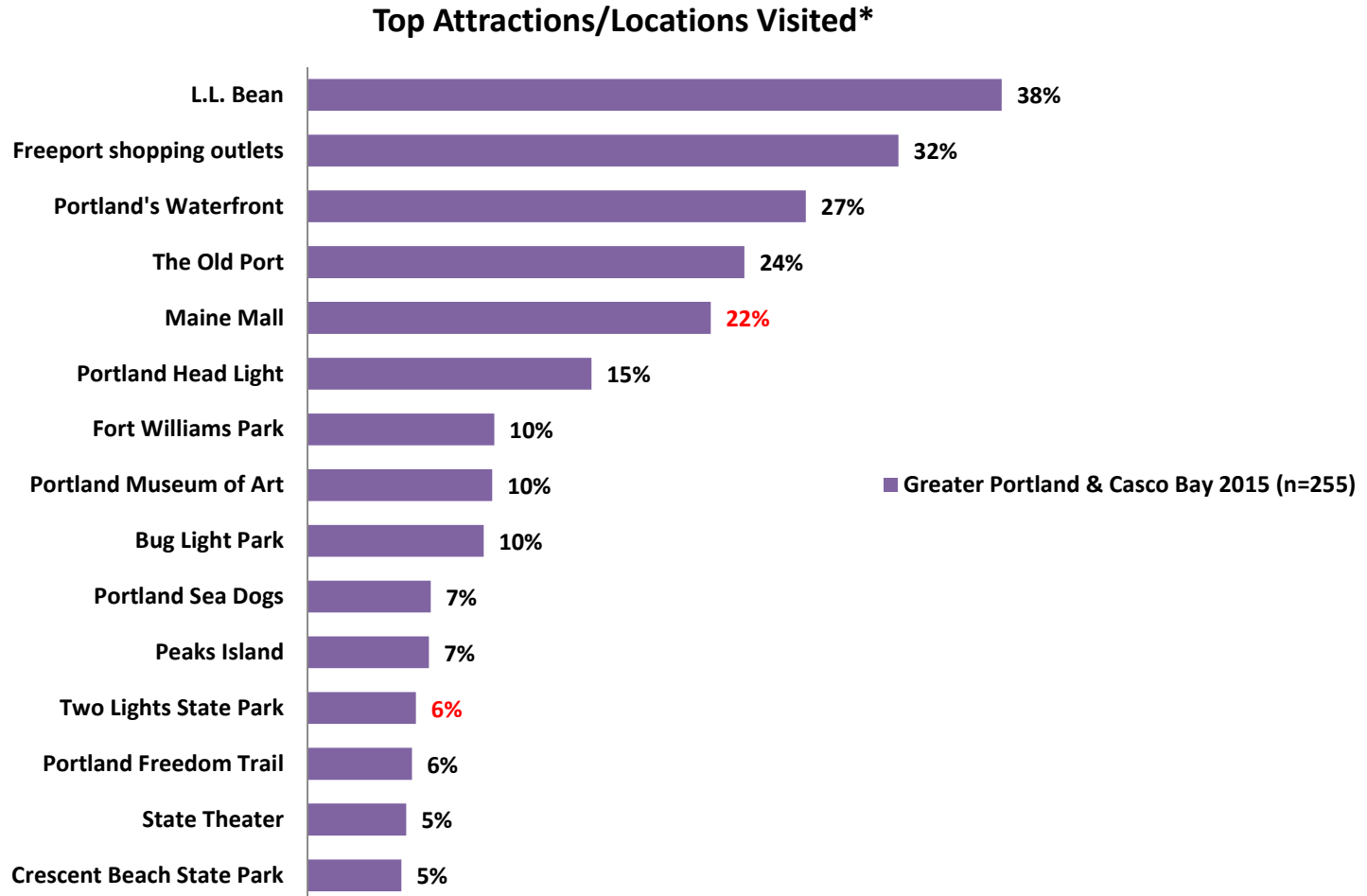
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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.

L.L. Bean garners the highest proportion of day visitors in the Greater Portland & Casco Bay region.



* Does not include response options selected by fewer than 5% of respondents.

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

< > 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.

Comparison of Greater Portland & Casco Bay Visitors to Maine Visitors



Comparisons: Region vs. State

- Visitors to the Greater Portland & Casco Bay 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, their reasons for traveling, and the activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the many shopping and dining experiences available in the Greater Portland region and a more “urban” experience.
- Highlights – Greater Portland & Casco Bay region vs. State visitors:

Visitor Origin

- **A higher proportion** of overnight visitors to the region from **Maine**.
- **A higher proportion** of day visitors from the **United States** overall and a **lower proportion** of day visitors to the region from **Canada**.
- **A higher proportion** of day visitors from **Massachusetts**.

Visitor Demographics

- Both overnight and day visitors to the region have **higher annual household incomes** and are **more likely to have a college degree**.
- Both overnight and day visitors to the region travel in **smaller parties**.
- Overnight visitors are **older** on average.

Comparisons: Region vs. State

- Highlights Continued:

Primary Purpose of VFR and Business Travel

- Overnight visitors on VFR travel are **less** likely to be visiting for a **family reunion** or a **funeral**.
- Business day travelers are **more** likely to visit for **sales or service**.

Trip Interest Areas – Overnight and Day Visitors

- Less likely to want to pursue the following interest areas:
 - Water activities
 - Family fun/children’s activities
 - Active outdoor activities

Trip Interest Areas – Overnight Visitors

- Less likely to want to do some **touring and sightseeing**.

Comparisons: Region vs. State

- Highlights Continued:

Maine Trip Interests and Importance (Importance Index)

Overnight and Day Visitors

- More likely to place importance on **food/beverage/culinary** activities
- Less likely to place importance on:
 - Touring/sightseeing
 - Active outdoor activities

Overnight Visitors

- More likely to place importance on **shopping**

Day Visitors

- Less likely to place importance on **water activities**

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- Less likely to be:
 - Enjoying the mountain views
 - Wildlife viewing/bird watching
 - Visiting animal parks or zoos
 - Sailing
 - Shopping for products with the “made in Maine” Identifier
 - Horseback riding
 - Attending operas or classical music events
 - Hunting

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More** likely to be:
 - Going to local brew pubs
- **Less** likely to be:
 - Enjoying mountain views
 - Riding ATVs
 - Attending plays, musicals, or theatrical events
 - Shopping for gifts or souvenirs
 - Visiting outdoor fun centers



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