

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

Regional Insights: The Maine Beaches

Prepared by



April 2016

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Research Objectives and Methodology

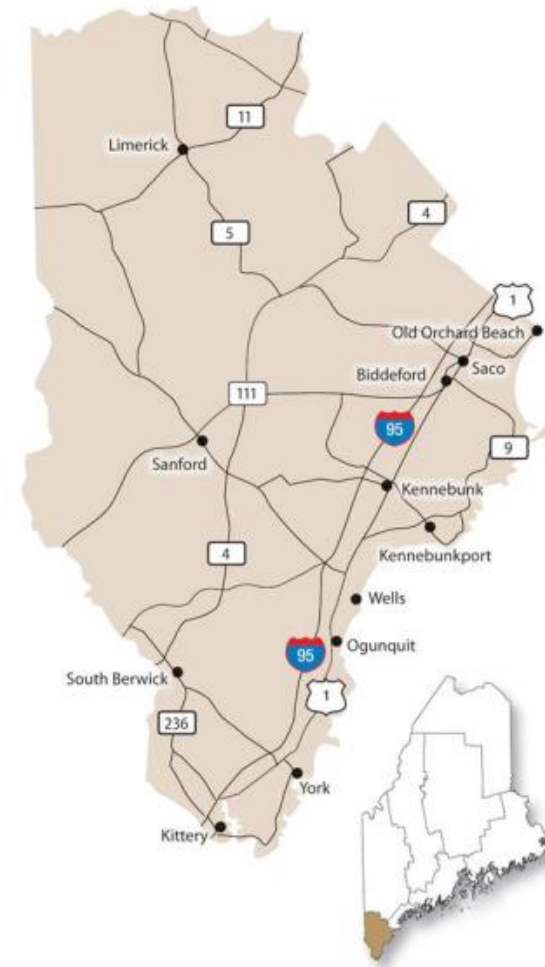


Research Objectives and Methodology

- 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 2014 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 results among visitors to the Maine Beaches tourism region during 2015, including:
 - 683 overnight visitors, and
 - 602 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 2014 and 2015 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 49 years old, on average, and have annual household incomes just over \$109,000. Nearly three-fourths have at least a college degree, and two-thirds are married. Fifty-seven percent are employed full-time.
- Overnight visitors to the Maine Beaches trend older and have higher annual household incomes than visitors to Maine overall. They are also less likely to be employed full-time.

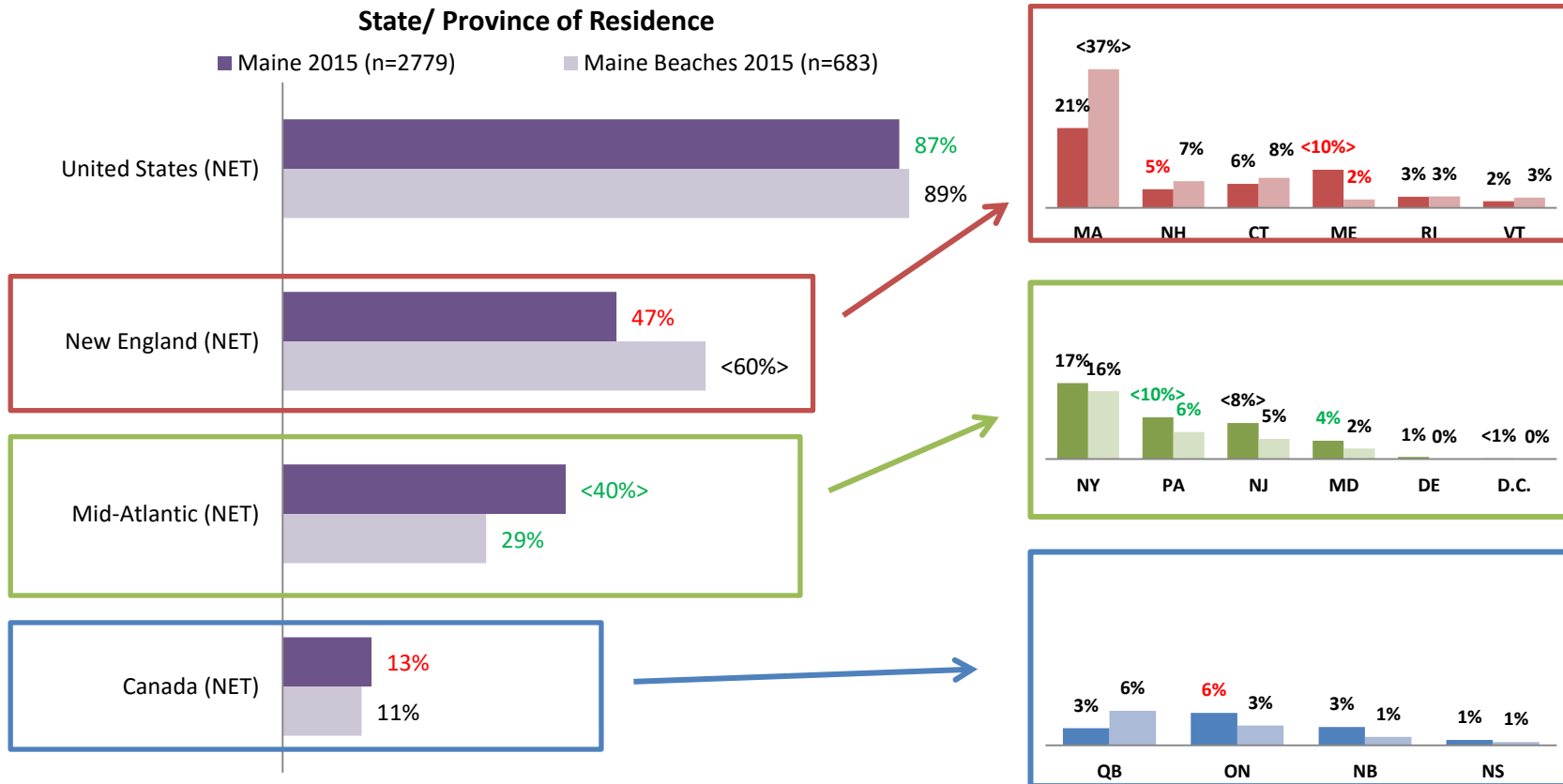
Overnight Visitors	Maine 2015 (n=2779)	Maine Beaches 2015 (n=683)
Age:		
< 35	<30%>	24%
35 - 44	<19%>	14%
45 - 54	19%	<23%>
55 +	31%	<39%>
Mean Age (Years)	45.4	<49.0>
Income:		
< \$50,000	17%	14%
\$50,000 - \$99,999	41%	41%
\$100,000 +	42%	45%
Mean Income (Thousands)	\$103,770	<\$109,190>
Female	58%	<65%>
College Degree or Higher	73%	71%
Married	64%	68%
Employed Full Time	<63%>	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 more than one-third of overnight visitors to the Maine Beaches, the highest proportion of any state or province.

- Compared to the State as a whole, this region attracts a higher proportion of overnight visitors from New England and a lower proportion of visitors from the Mid-Atlantic.



State/ Province of Residence

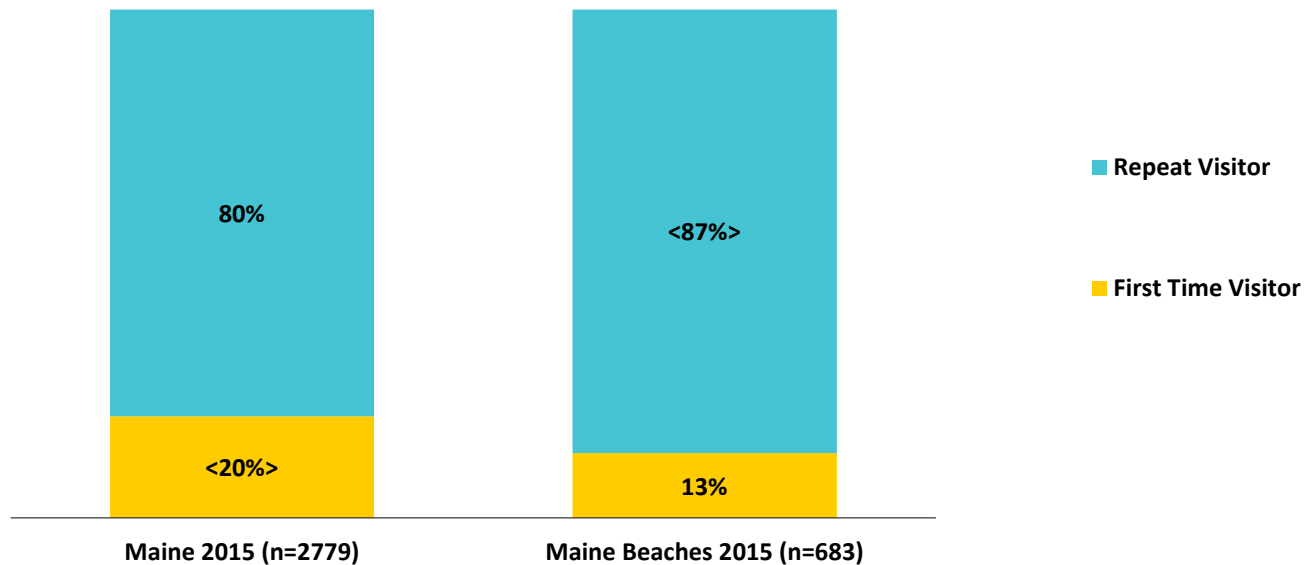
<> indicates a significant difference between subgroups at the 95% confidence level.

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 does the State of Maine overall.

Repeat vs. First Time Visitors



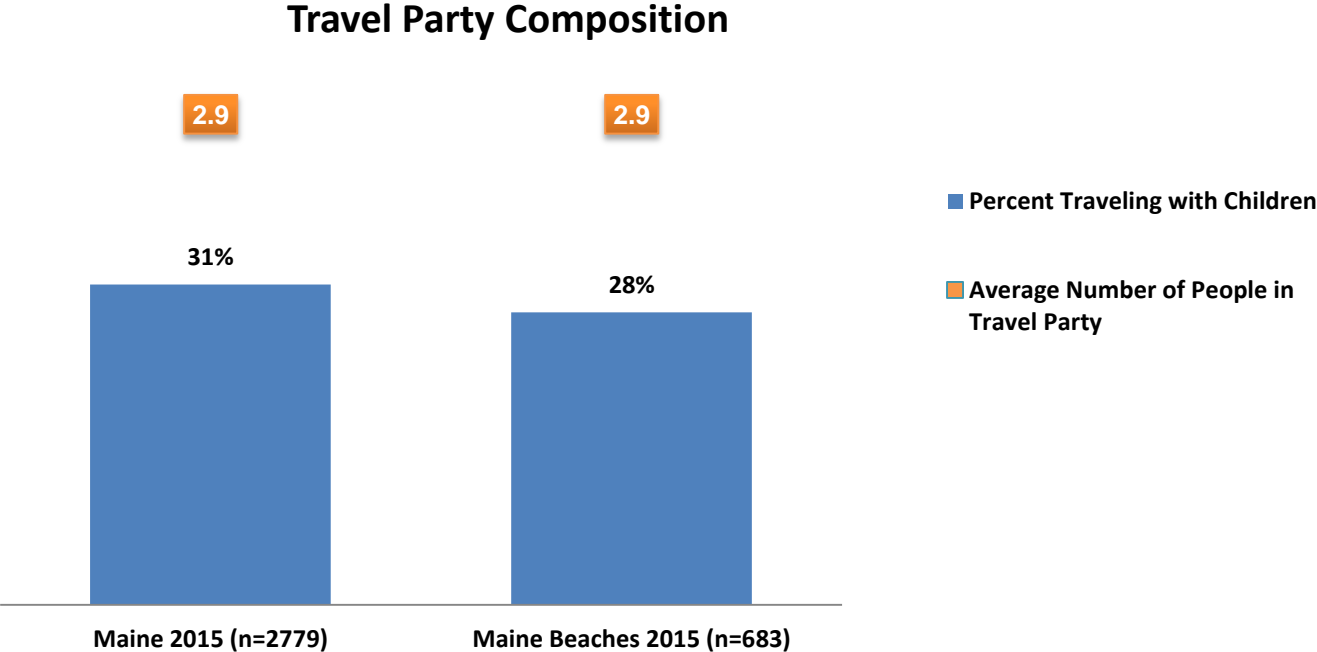
Q11. Was this your first visit in Maine?

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

<> 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.

On average, overnight visitors to the Maine Beaches travel in parties of three, and one-fourth 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?

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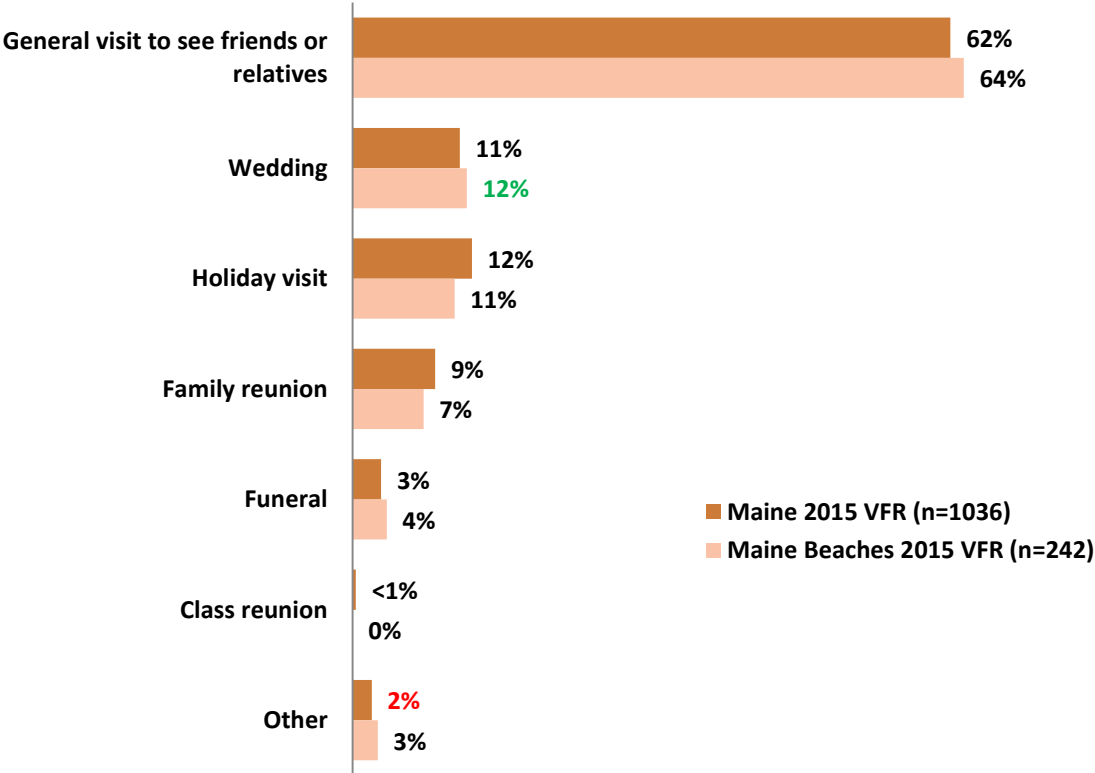
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



Among overnight VFR travelers to the Maine Beaches, two in three make a *general visit to see friends or relatives*.

Primary Purpose of Overnight VFR Trips



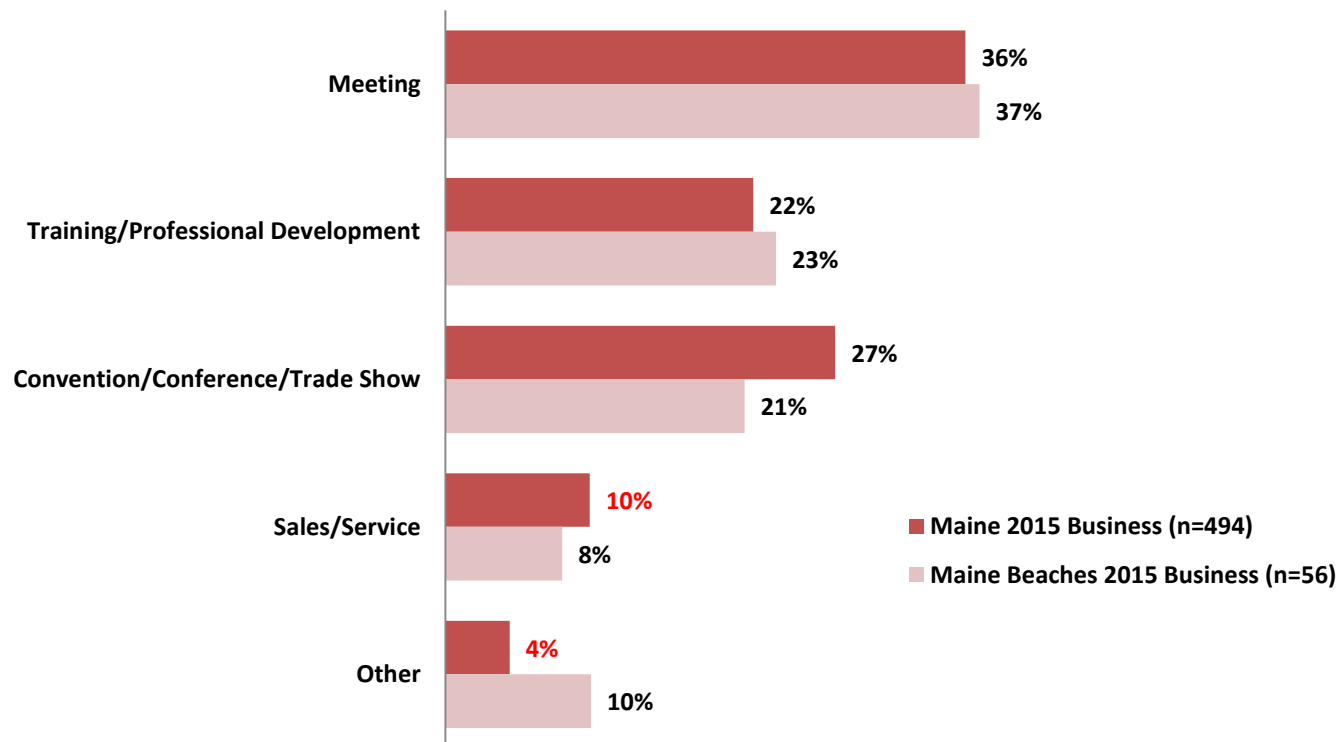
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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One in three overnight business travelers visit the region for a *meeting*, while one in four are in the area for *training/professional development*.

Primary Purpose of Overnight Business Trips



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

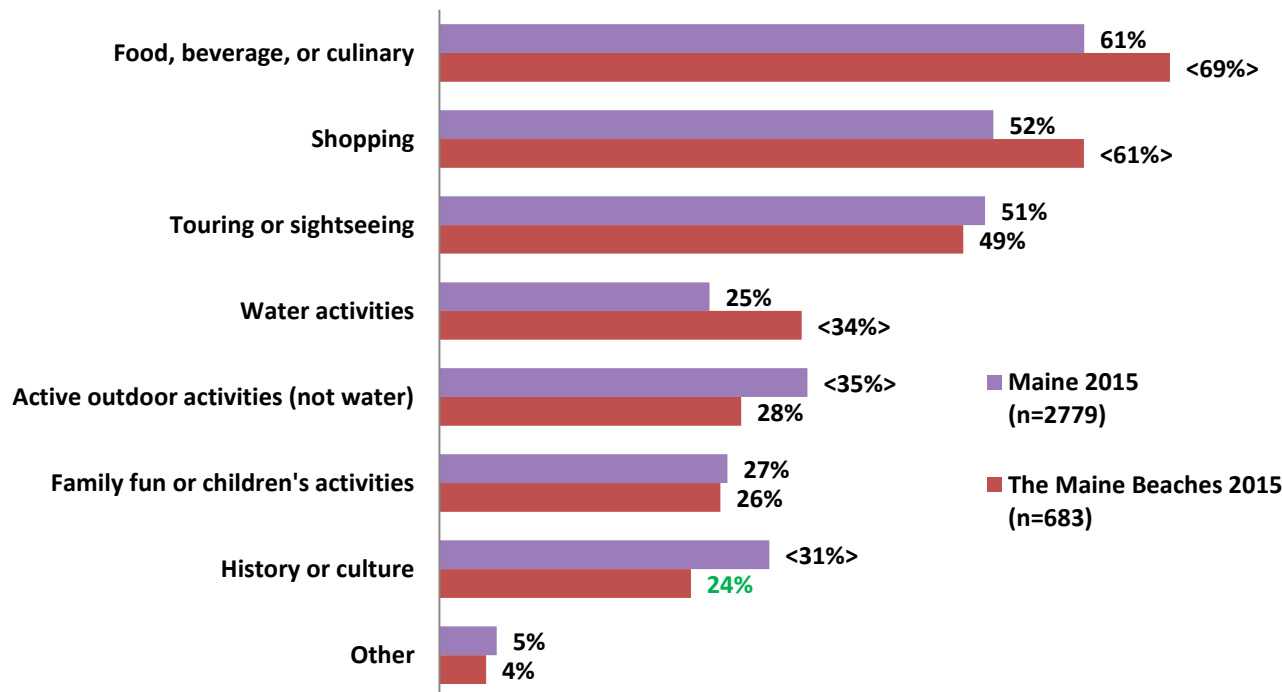
<> indicates a significant difference between subgroups at the 95% confidence level.

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Food/beverage/culinary activities 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 overall in the interest areas they want to pursue on their trip to Maine. Higher proportions of Maine Beaches visitors are interested in *food/beverage/culinary activities, shopping, and water activities*, while *active outdoor activities and history/culture activities* are less popular.

2015 Interest Areas



Most Important Interest Area
The Maine Beaches

Food, beverage, or culinary	38%
Shopping	17%
Touring or sightseeing	47%
Water activities	41%
Active outdoor activities (not water)	20%
Family fun or children's activities	49%
History or culture	21%
Other	71%

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

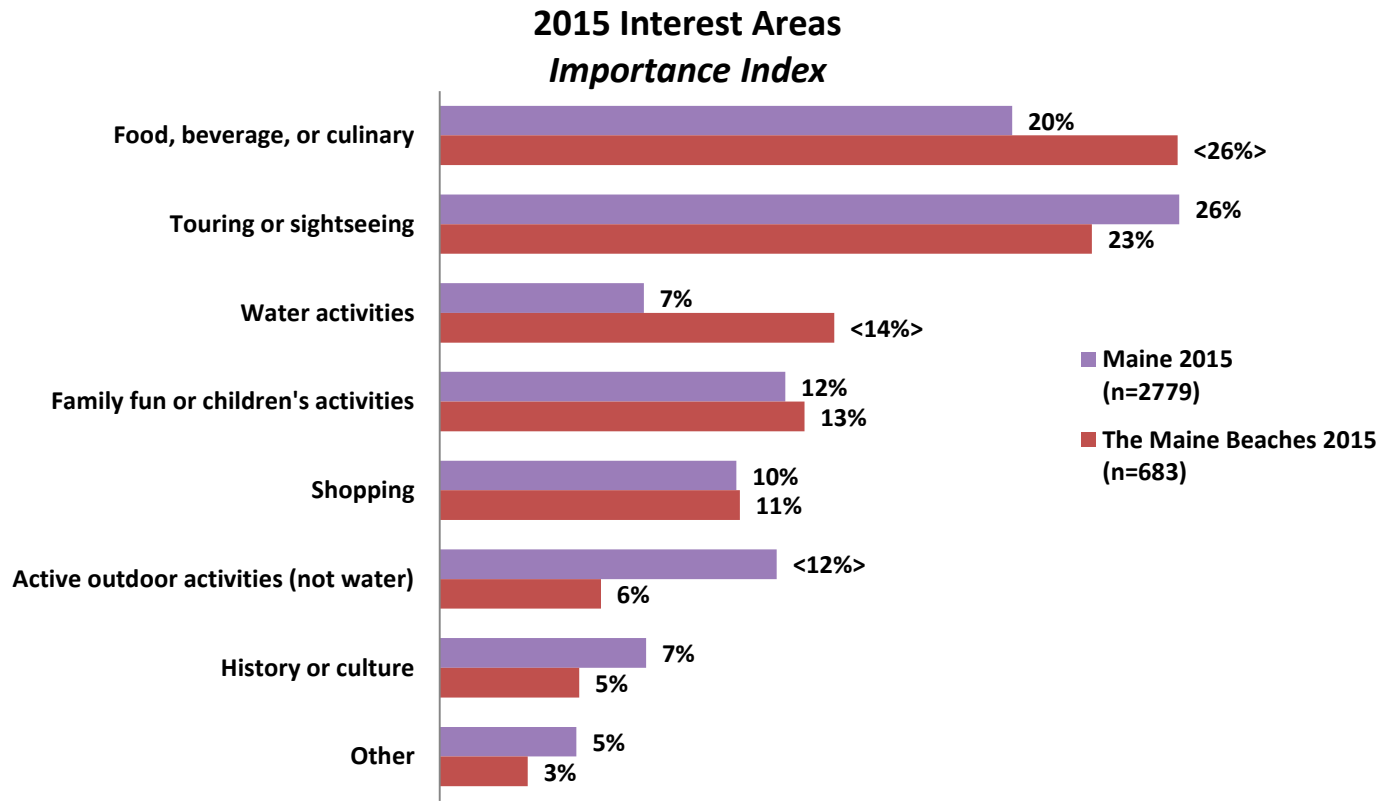
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

<> 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.

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

- Overnight visitors to the Maine Beaches region are more likely to place importance (through indicating interest and importance) on food/beverage/culinary activities and water activities than are overnight visitors to the State as a whole.



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



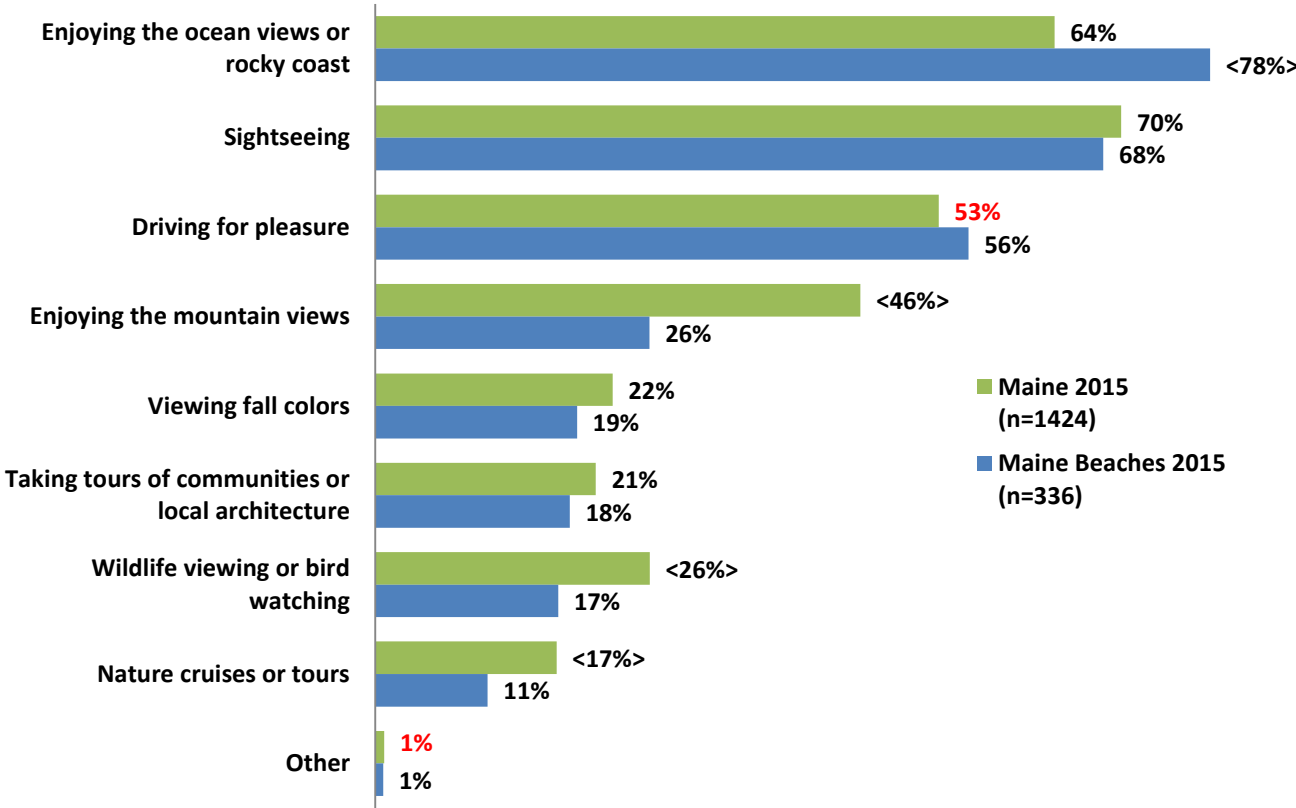
Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15
 <> indicates a significant difference between subgroups at the 95% confidence level.
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The most common activities of visitors to the region who are interested in touring/sightseeing are *enjoying the ocean views or rocky coast, sightseeing, and driving for pleasure.*

- Overnight visitors to the Maine Beaches region who are interested in touring or sightseeing are more likely to *enjoy the ocean views/rocky coast* while visiting compared to visitors to the state overall.

Touring or Sightseeing Activities

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

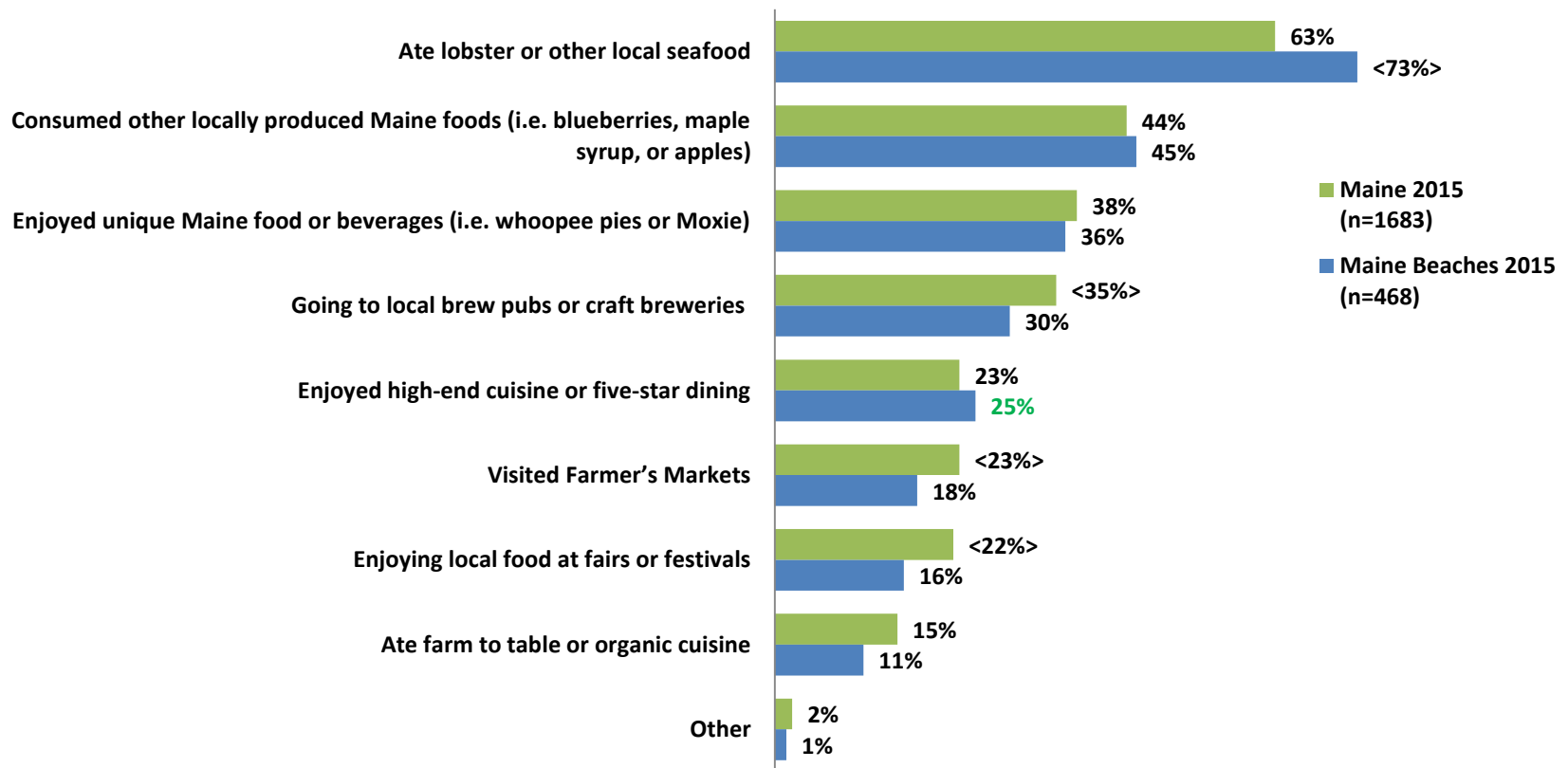


Three in four overnight visitors who are interested in food/beverage/culinary activities ate lobster or other local seafood while visiting the Maine Beaches region.

- Eating lobster or other local seafood is more common among visitors to the Maine Beaches region than among all overnight visitors to the State of Maine, while going to local brew pubs, farmer's markets, and enjoying local food at fairs or festivals is less common.

Food, Beverage, or Culinary Activities

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



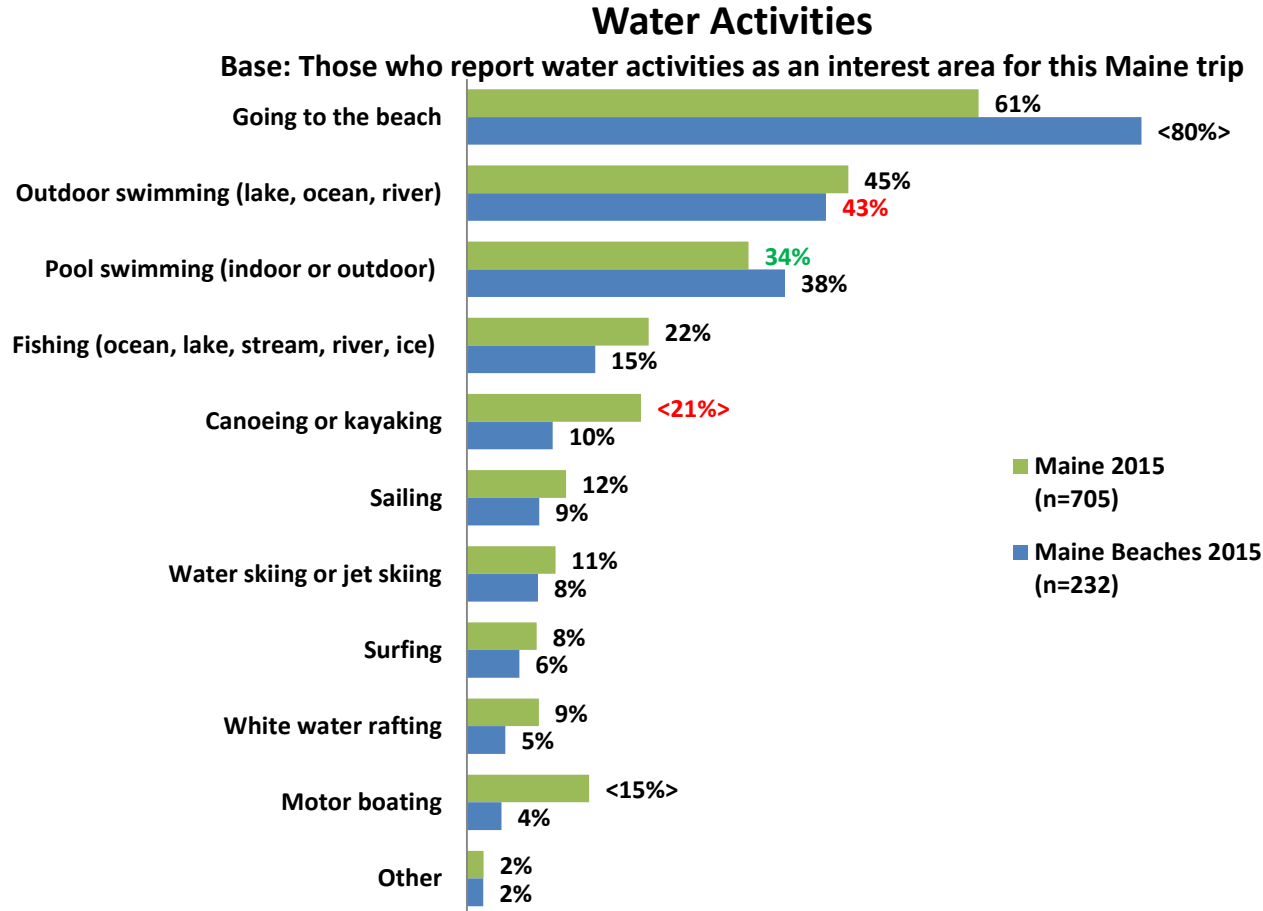
Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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Among overnight visitors interested in water activities, *going to the beach* is the most common activity, enjoyed by 80% of visitors.

- As expected, visitors to the Maine Beaches region are more likely to *go to the beach* compared to visitors to the State as a whole. However, they are less likely than visitors to the State overall to *canoe/kayak* or *motor boat* while in the area.



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.

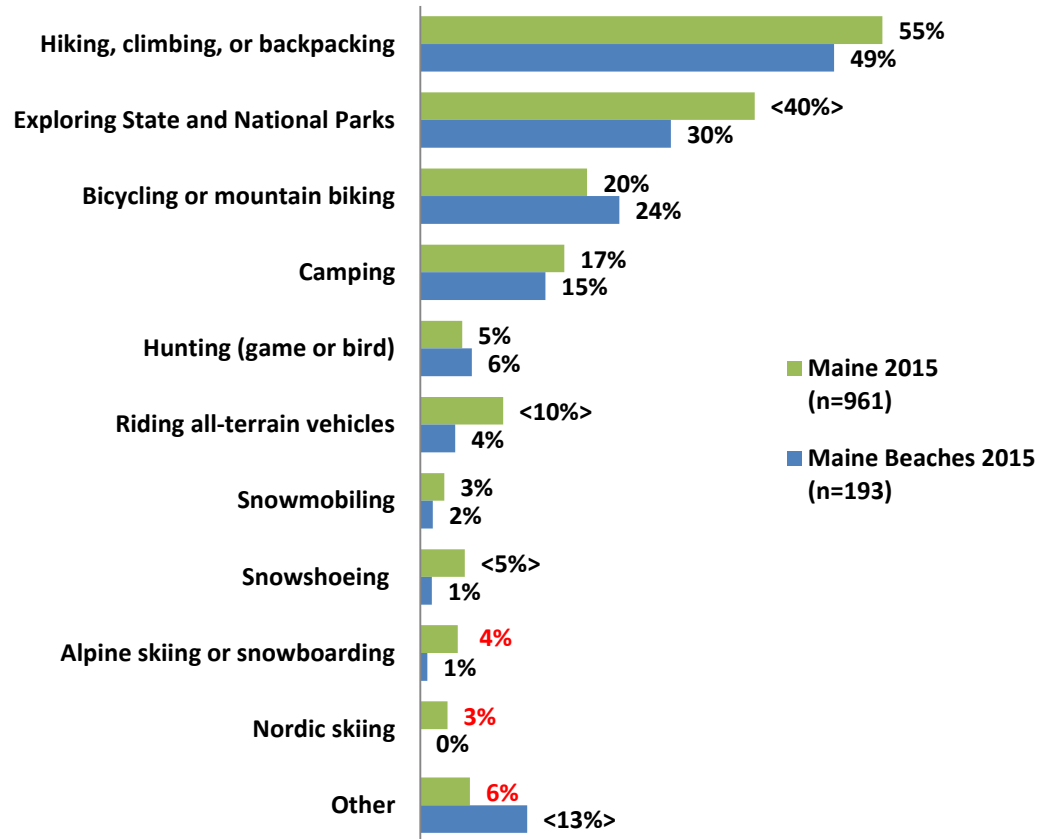
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of visitors to the Maine Beaches region who are interested in non-water based active outdoor activities go *hiking, climbing, or backpacking*.

- A lower proportion of Maine Beaches overnight visitors *explore State and National Parks* compared to visitors to the State overall, although it is the second most common non-water outdoor activity in which they engage.

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.*

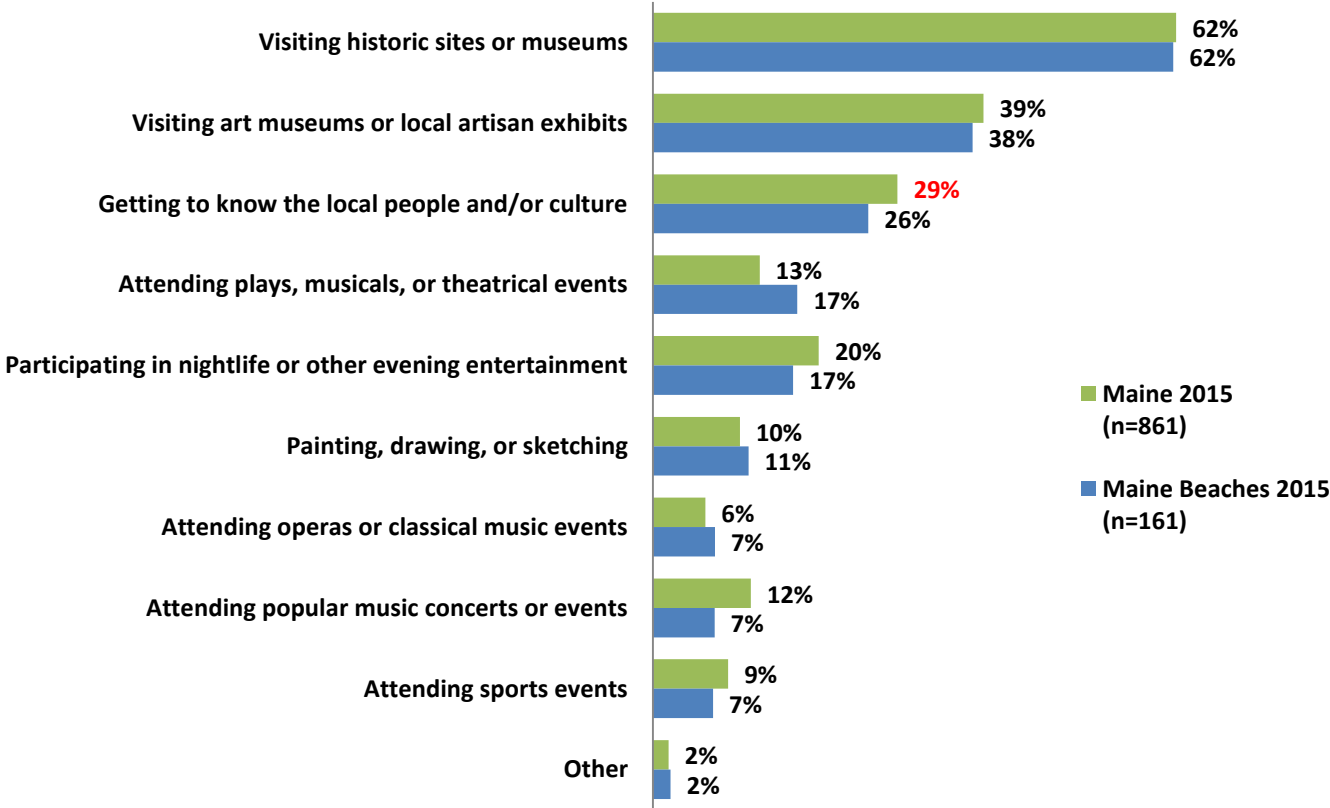
<> indicates a significant difference between subgroups at the 95% confidence level.

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Visiting historic sites or museums is the most common activity among overnight Maine Beaches visitors interested in history/culture activities.

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.

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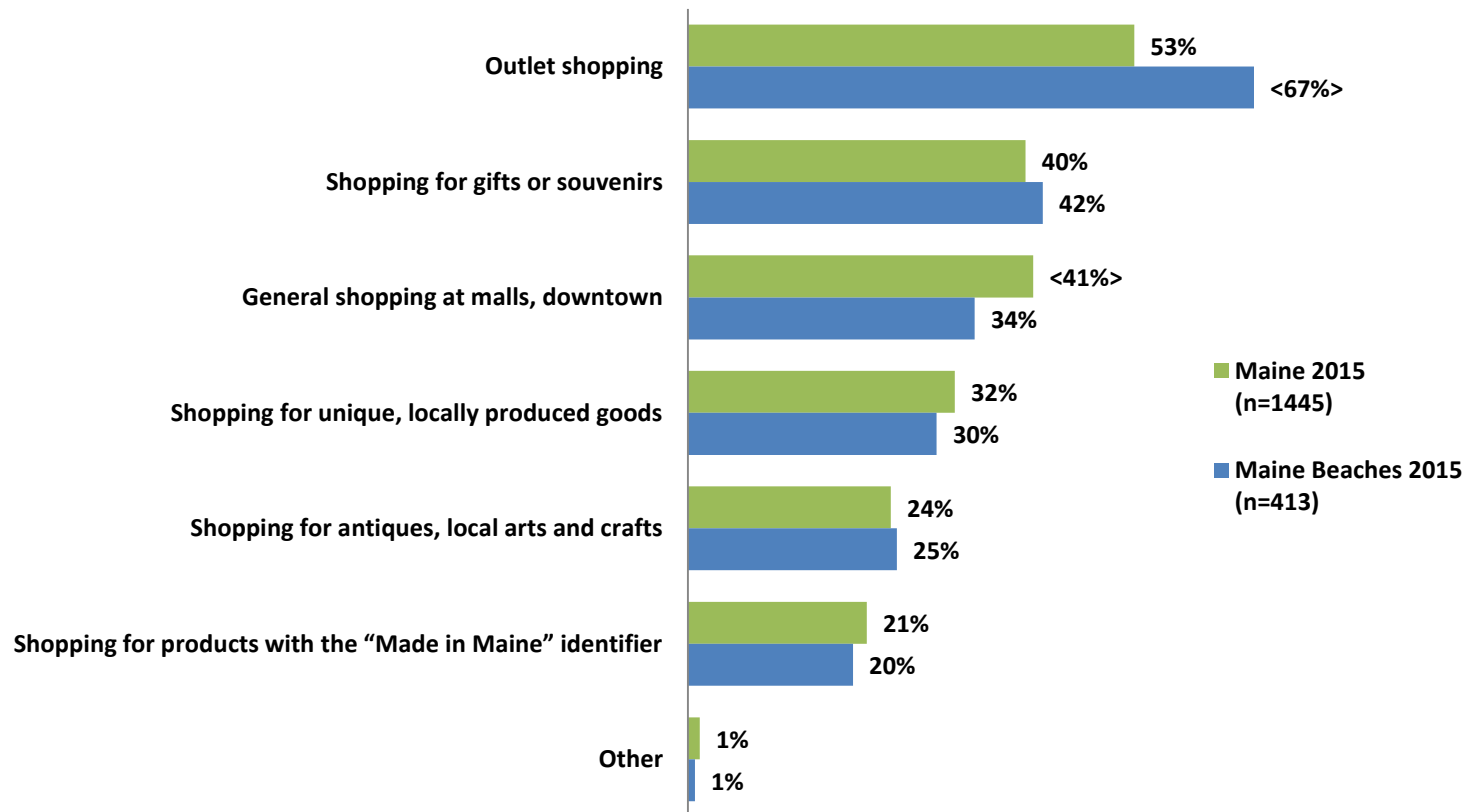
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outlet shopping is the most popular shopping activity among overnight visitors to the Maine Beaches region.

- Compared to overnight visitors to the State of Maine overall, Maine Beaches visitors are more likely to *shop at the outlets* while visiting and less likely to do *general shopping at malls/downtown*.

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.*

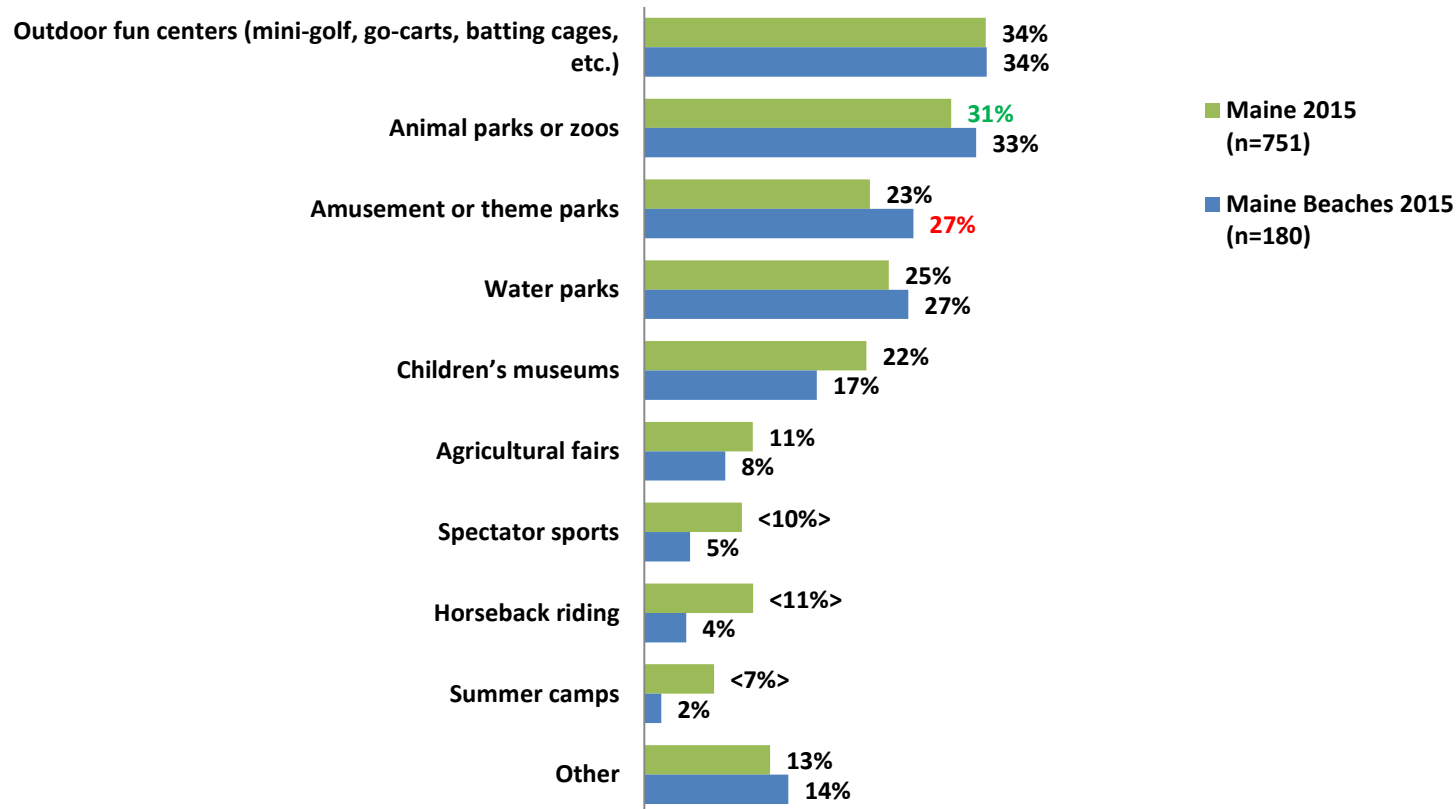
<> indicates a significant difference between subgroups at the 95% confidence level.

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

One in three overnight visitors to the region who are interested in family fun/children's activities go to *outdoor fun centers* and *animal parks and zoos*.

Family Fun/Children's Activities

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



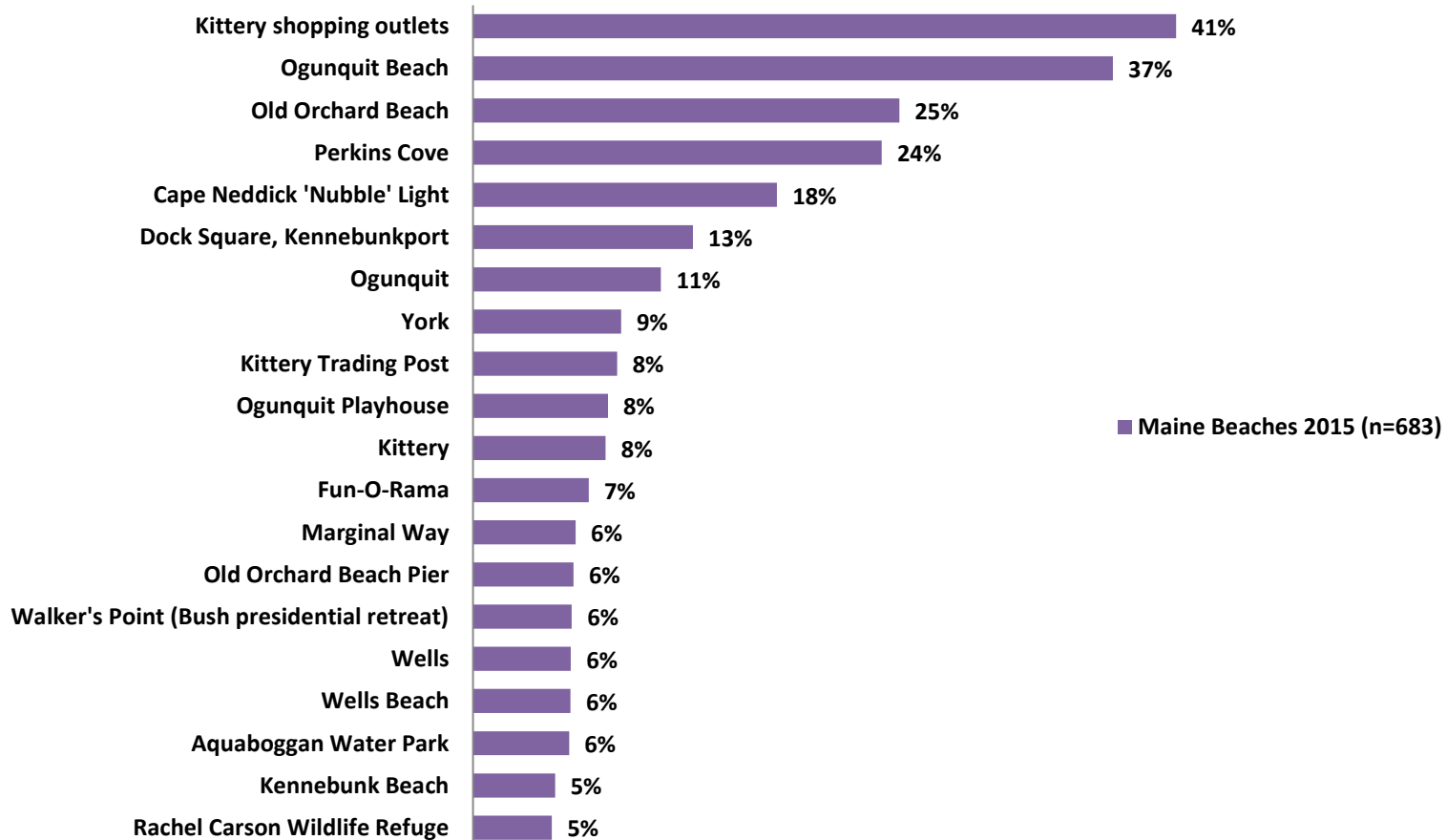
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

Top Attractions/Locations Visited*



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

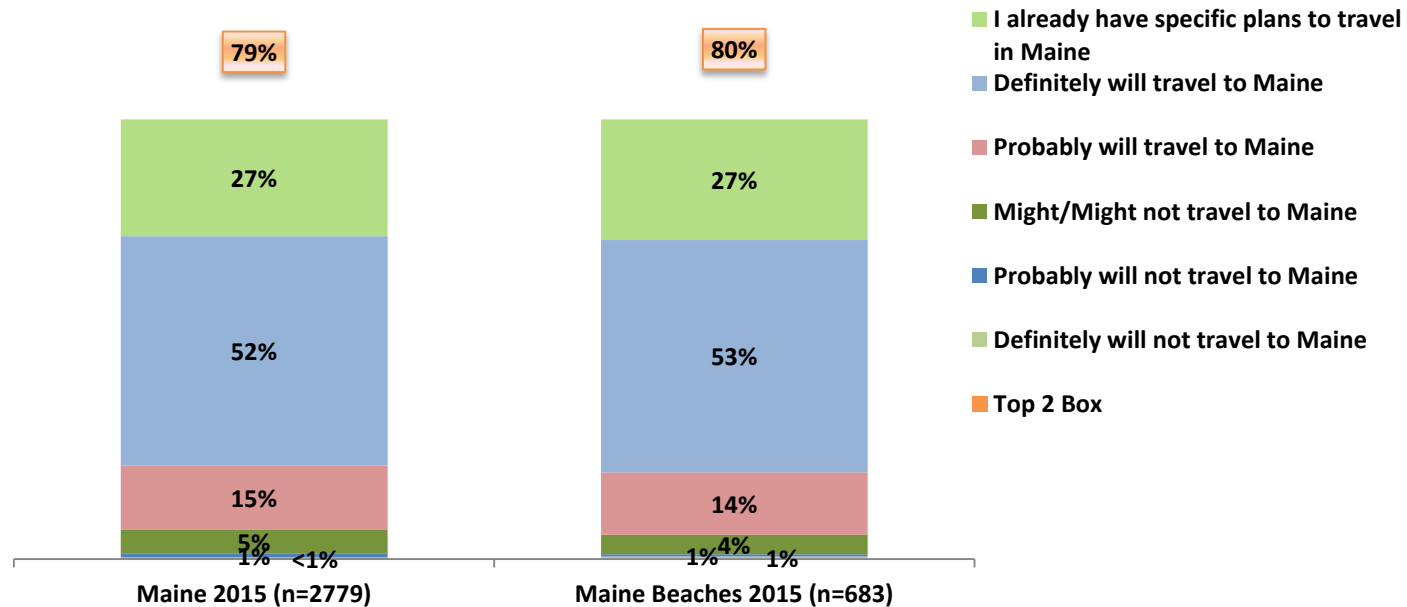
Q26. Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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8 out of 10 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?

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Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Maine Beaches region average 48 years old and earn just under \$100,000 annually. Half are employed full-time.
- Day visitors to the Maine Beaches region are similar in age to Maine day visitors overall, but have higher average annual household incomes.

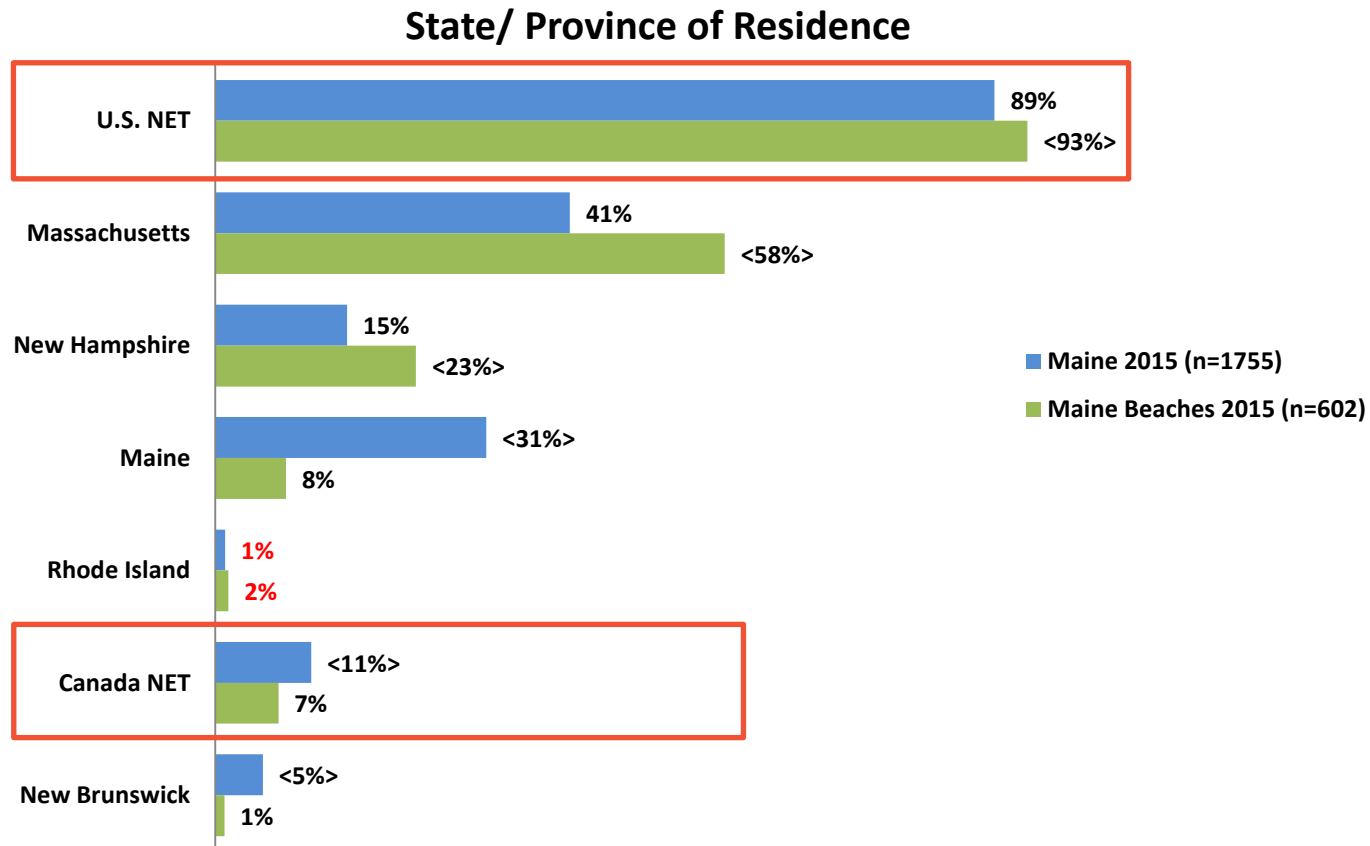
Day Visitors	Maine 2015 (n=1755)	Maine Beaches 2015 (n=602)
Age:		
< 35	25%	27%
35 - 44	16%	14%
45 - 54	21%	22%
55 +	38%	36%
Mean Age (Years)	48.0	47.9
Income:		
< \$50,000	<22%>	17%
\$50,000 - \$99,999	43%	44%
\$100,000 +	35%	39%
Mean Income (Thousands)	\$93,020	<\$98,820>
Female	62%	<68%>
College Degree or Higher	68%	67%
Married	60%	61%
Employed Full Time	55%	52%

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Nearly all day visitors to the region are United States residents, and over half are from Massachusetts.

- Compared to the State of Maine as a whole, the Maine Beaches region attracts a greater proportion of day visitors from Massachusetts and New Hampshire, and a lesser proportion from Maine and Canada.



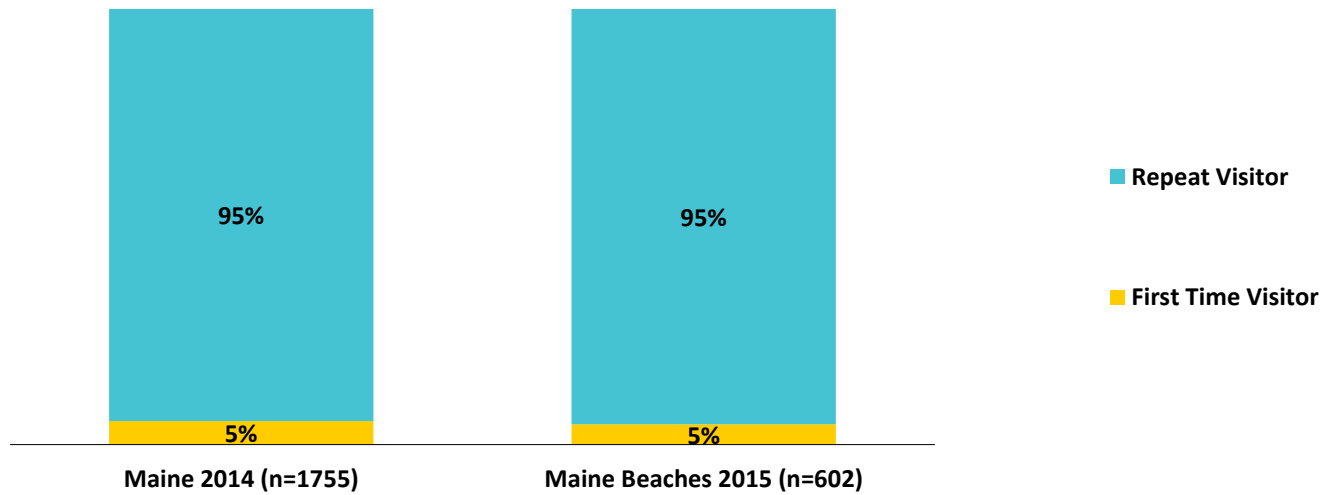
Q2. In what State or Province do you reside?

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Almost all day visitors to the Maine Beaches are repeat visitors.

Repeat vs. First Time Visitors

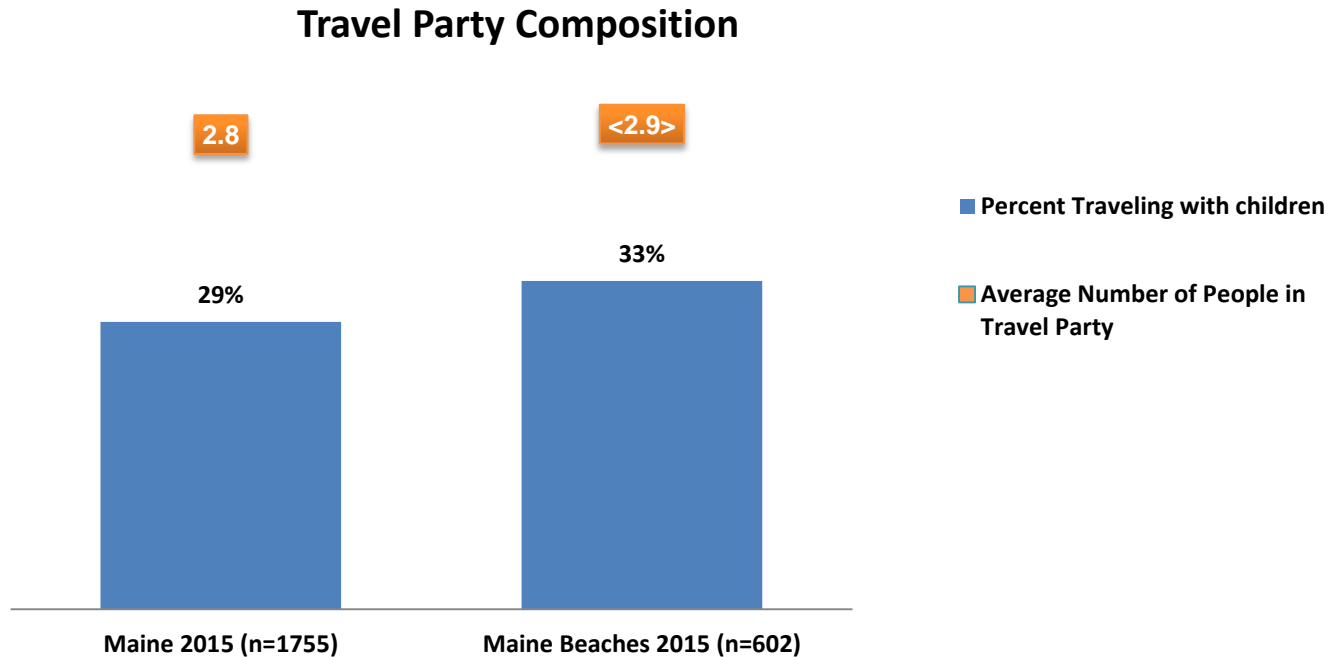


Q10. Was this your first trip to Maine?

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On average, day visitors to the Maine Beaches region are traveling in parties of three, and 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

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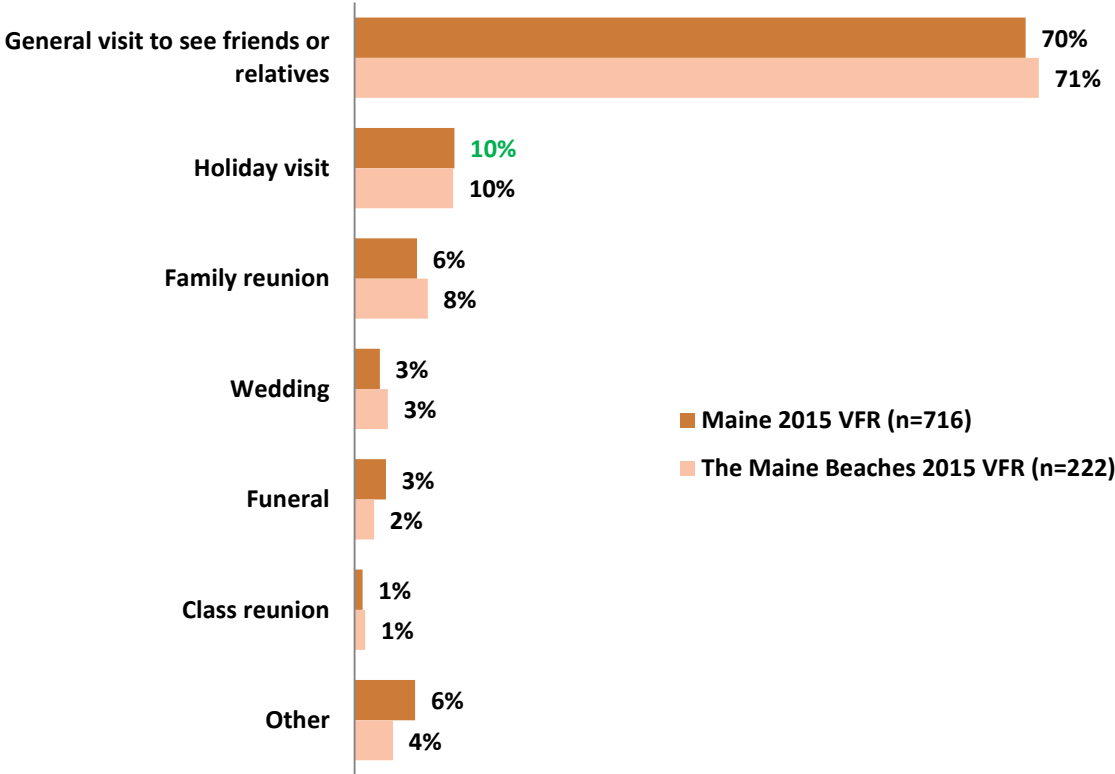
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Seven out of ten 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



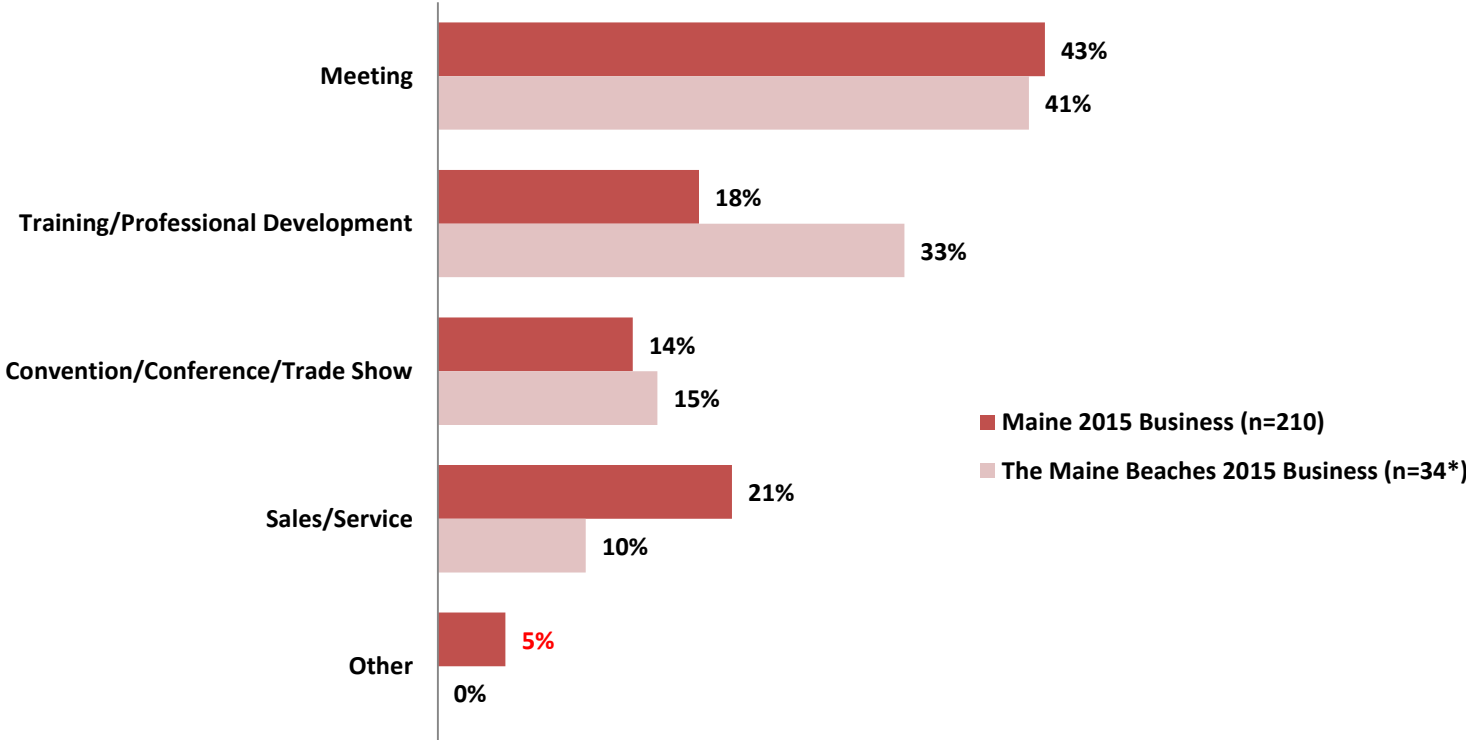
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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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*, followed by *training/professional development*.

Primary Purpose of Day Business Trips



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

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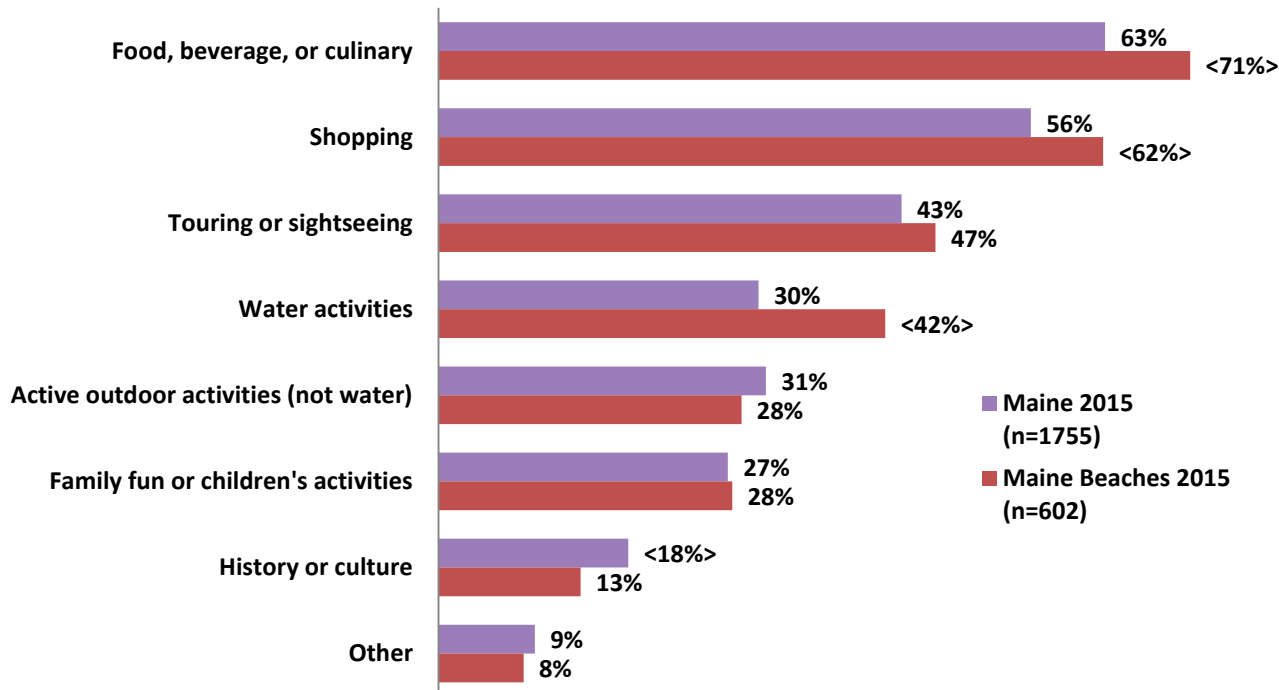
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

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

- Similar to overnight visitors, a higher proportion of day visitors to this region are interested in *food/beverage/culinary activities, shopping, and water activities* compared to all Maine visitors.

2015 Interest Areas



Most Important Interest Area Maine Beaches	
Food, beverage, or culinary	25%
Shopping	23%
Touring or sightseeing	43%
Water activities	40%
Active outdoor activities (not water)	30%
Family fun or children's activities	52%
History or culture	16%
Other	75%

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

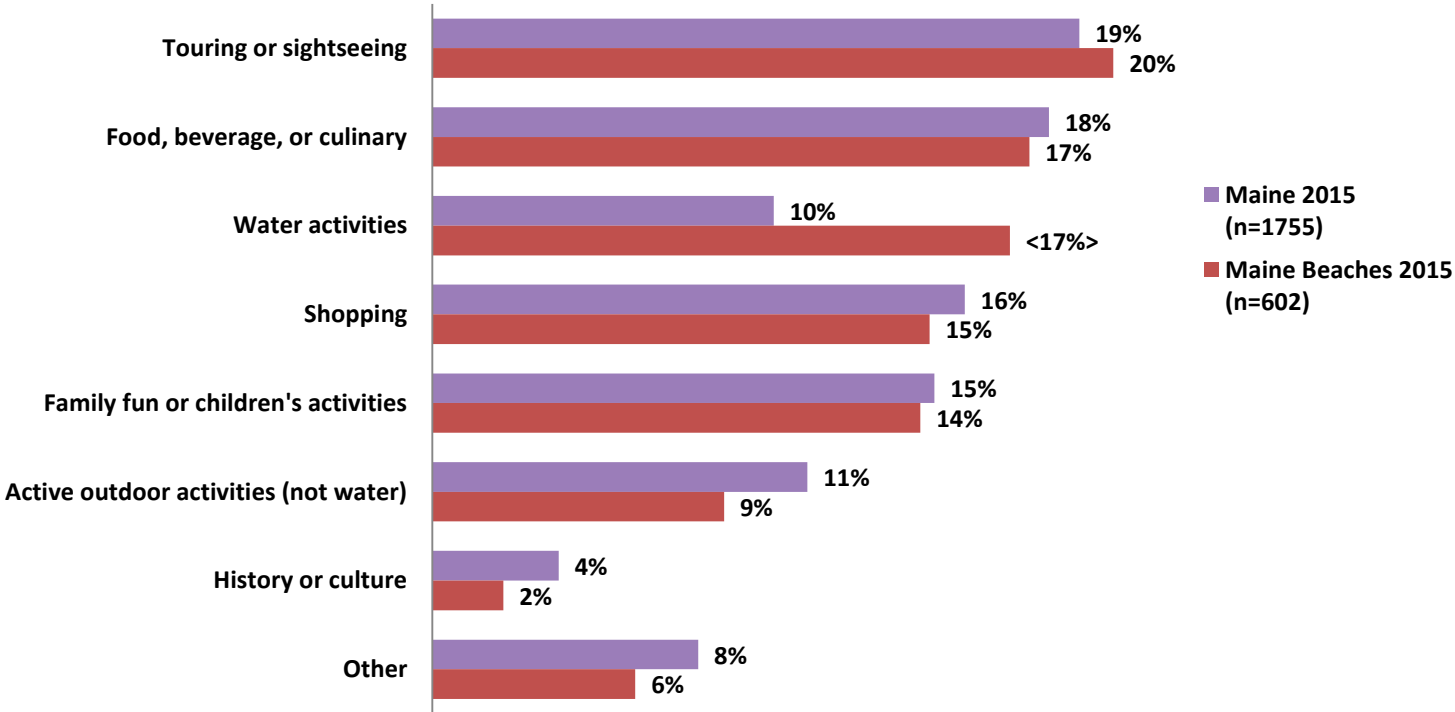
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When analyzing both interest and importance in deciding to visit, touring/sightseeing, food/beverage/culinary activities, and water activities rank highest among day visitors.

- Water activities rank higher among day visitors to the Maine Beaches region than among day visitors to the State overall.

2015 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. 34
 <> indicates a significant difference between subgroups at the 95% confidence level.
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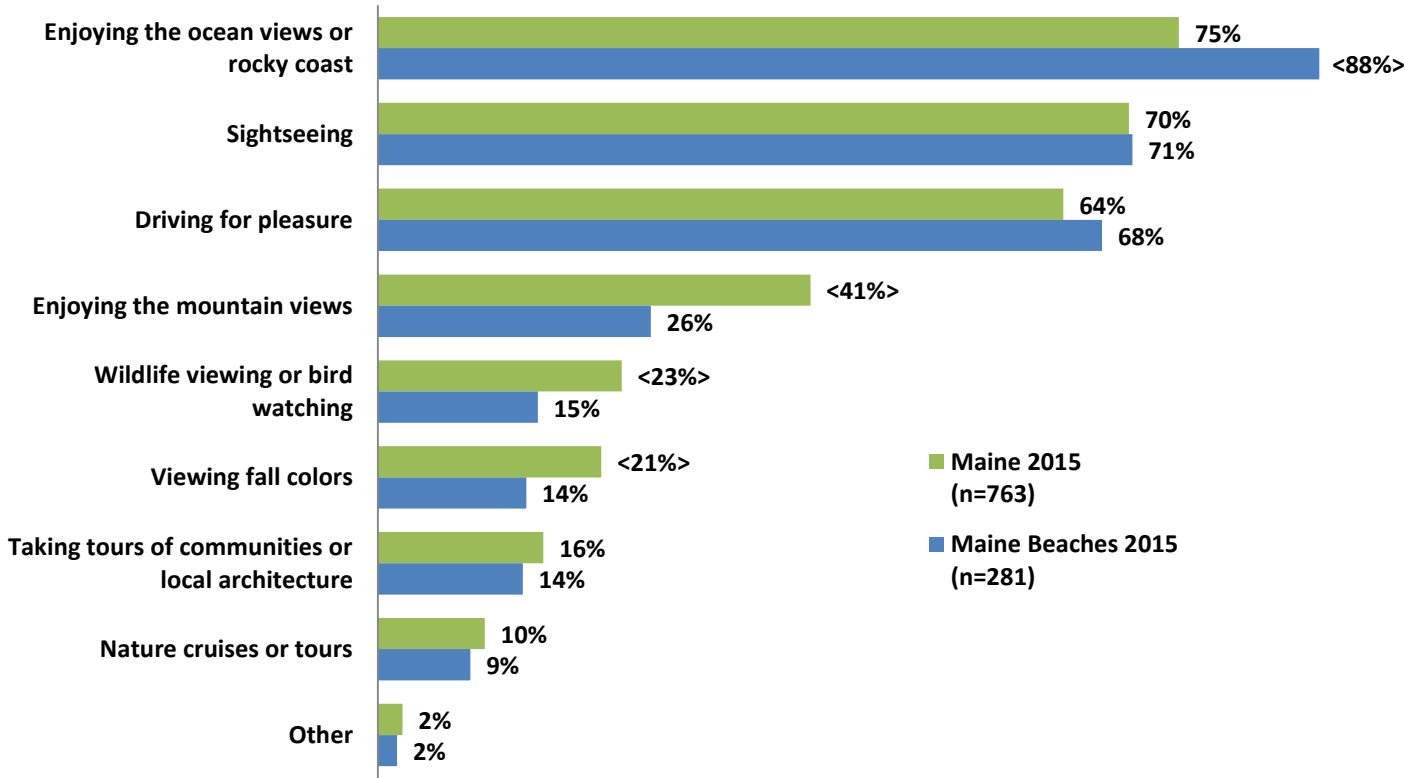


Enjoying the ocean views or rocky coast is the most popular activity among day visitors to the Maine Beaches who are interested in touring/sightseeing activities.

- A higher proportion of day visitors to this region *enjoy ocean views or the rocky coast* compared to all Maine visitors.
- Maine Beaches visitors are less likely to go *wildlife viewing/bird watching, view fall colors, and enjoy the mountain views* compared to visitors to the State of Maine overall.

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.

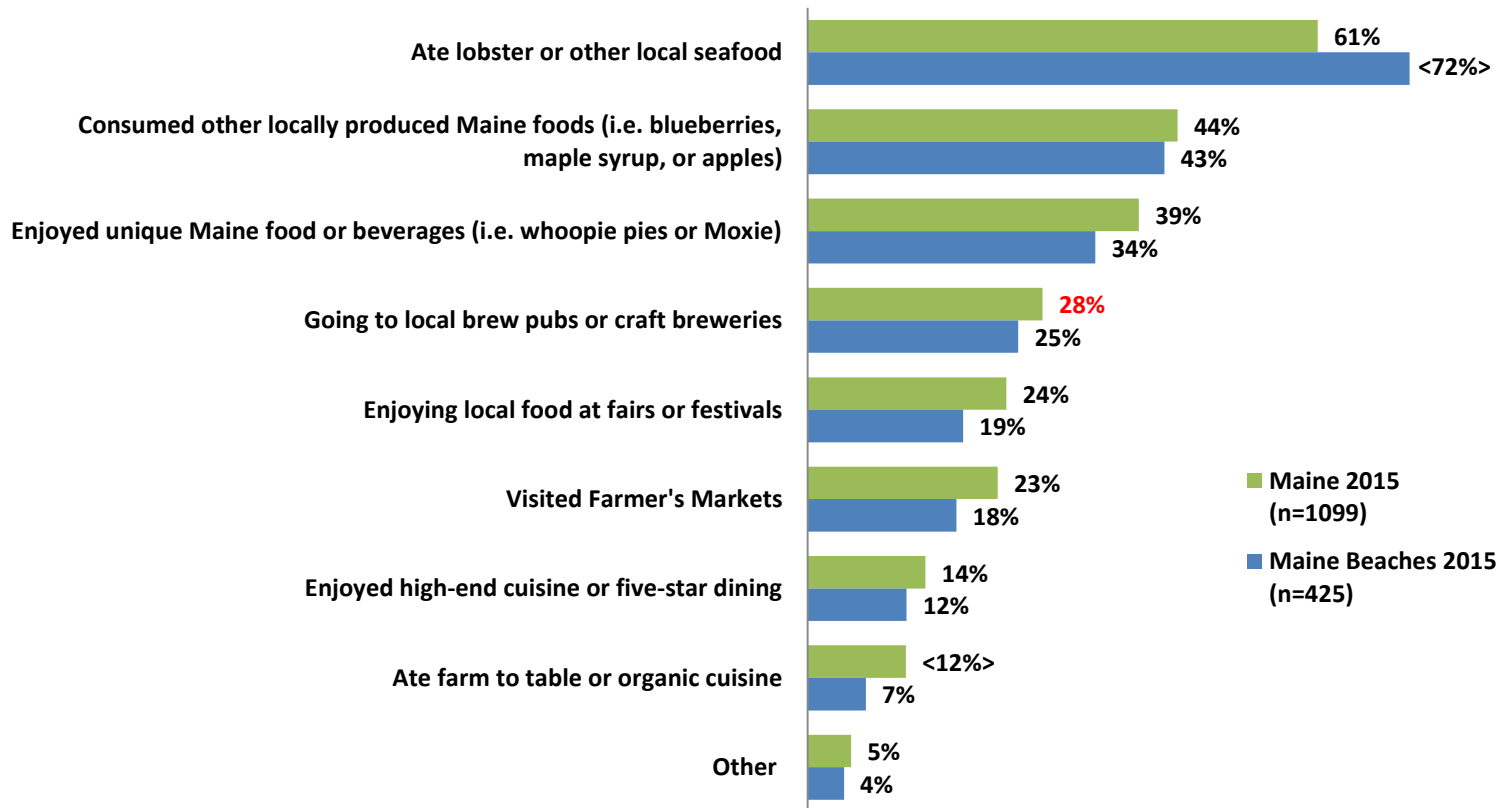
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- A greater proportion of day visitors to this region *ate lobster or other local seafood* compared to all Maine day visitors, while a lesser proportion *ate farm to table or organic cuisine*.

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.*

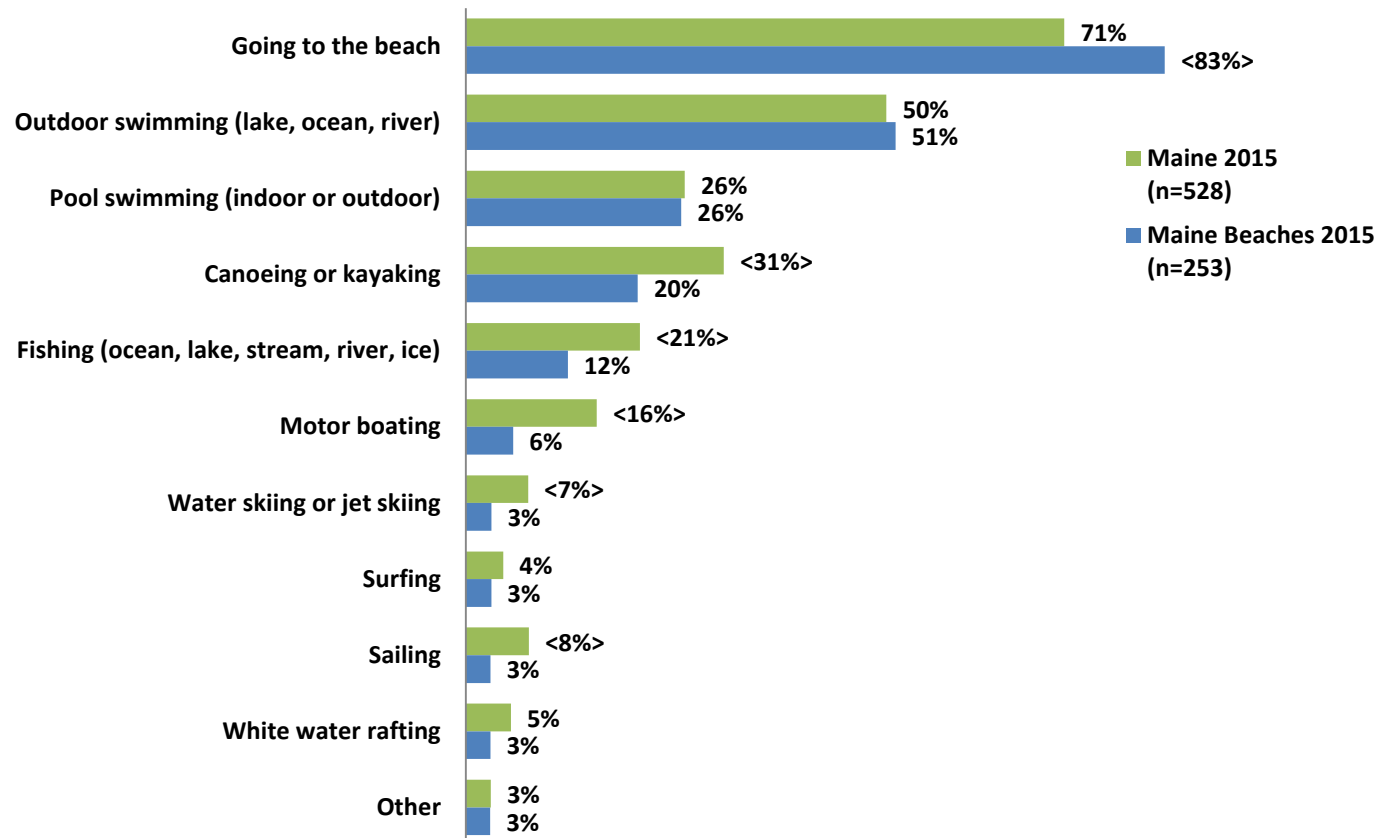
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Eight in ten day visitors to the Maine Beaches region who are interested in water activities *spent time at the beach while visiting.*

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.*

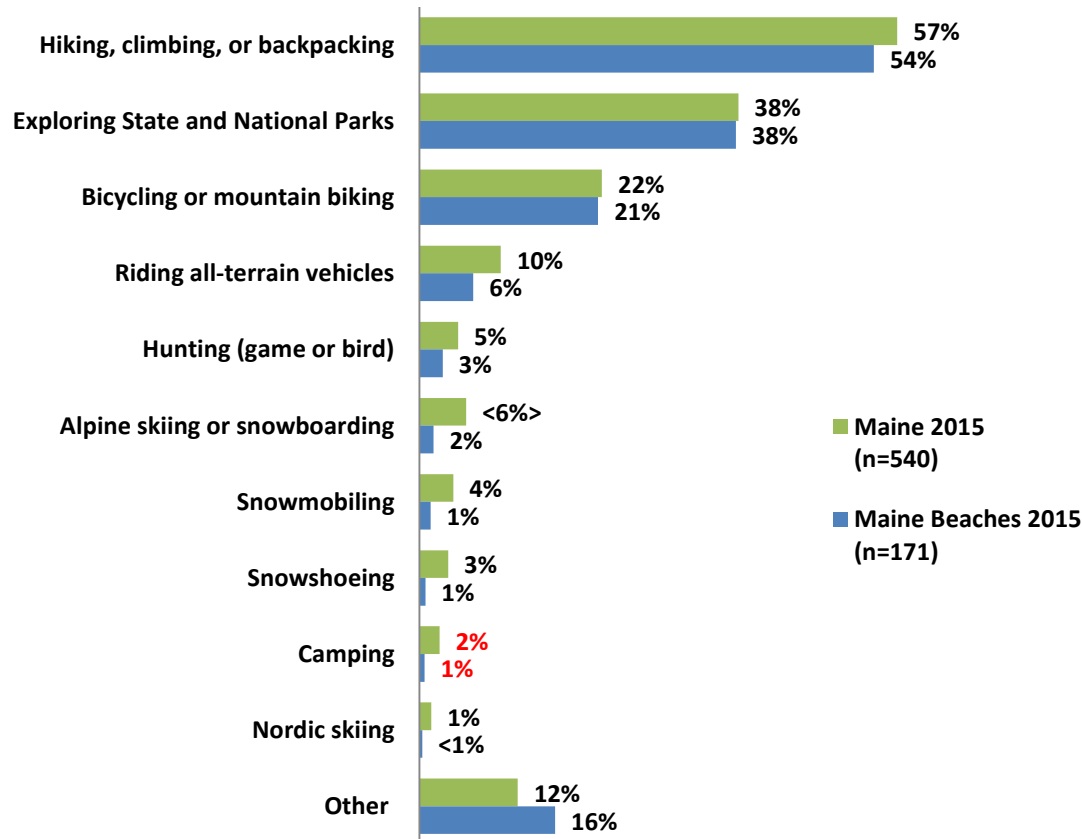
<> indicates a significant difference between subgroups at the 95% confidence level.

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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.*

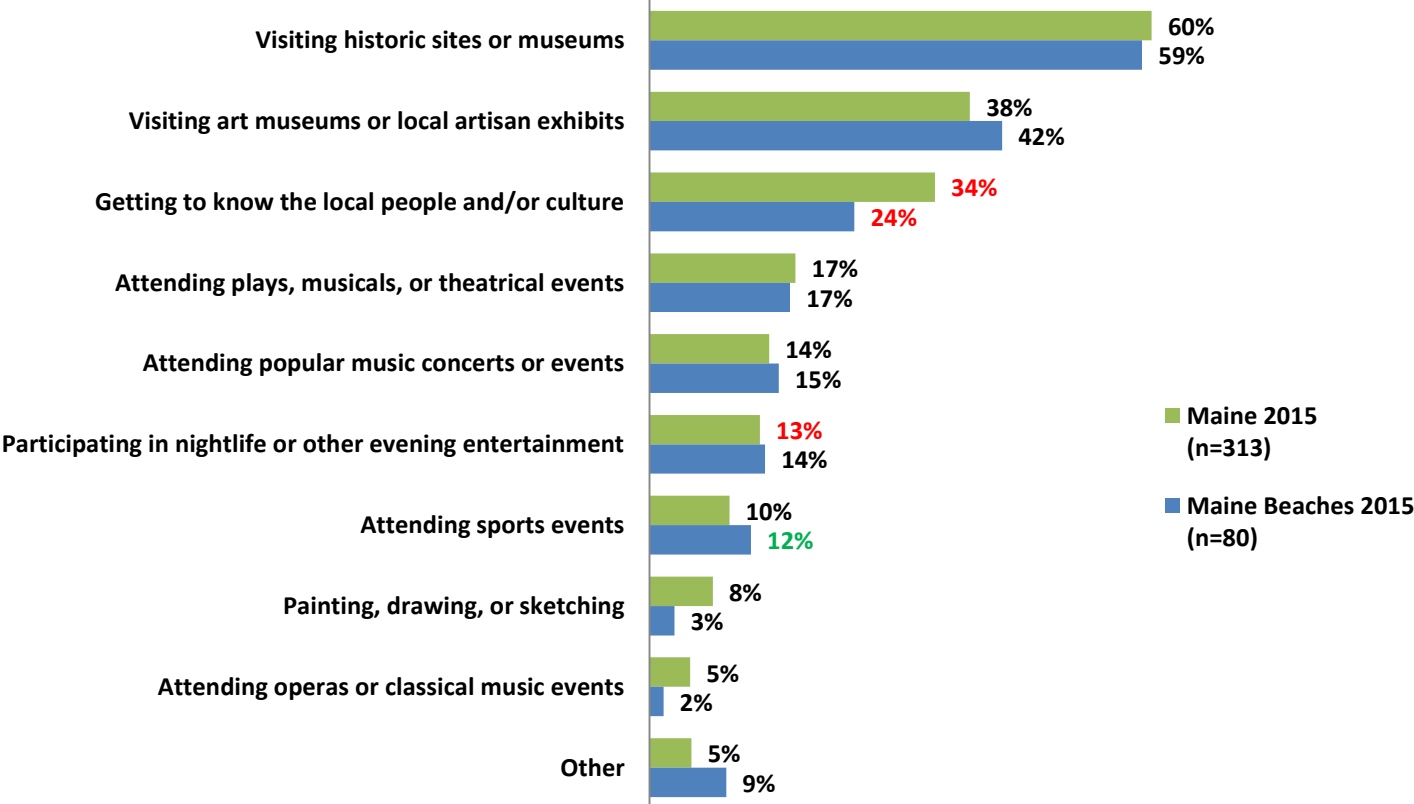
<> indicates a significant difference between subgroups at the 95% confidence level.

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

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.

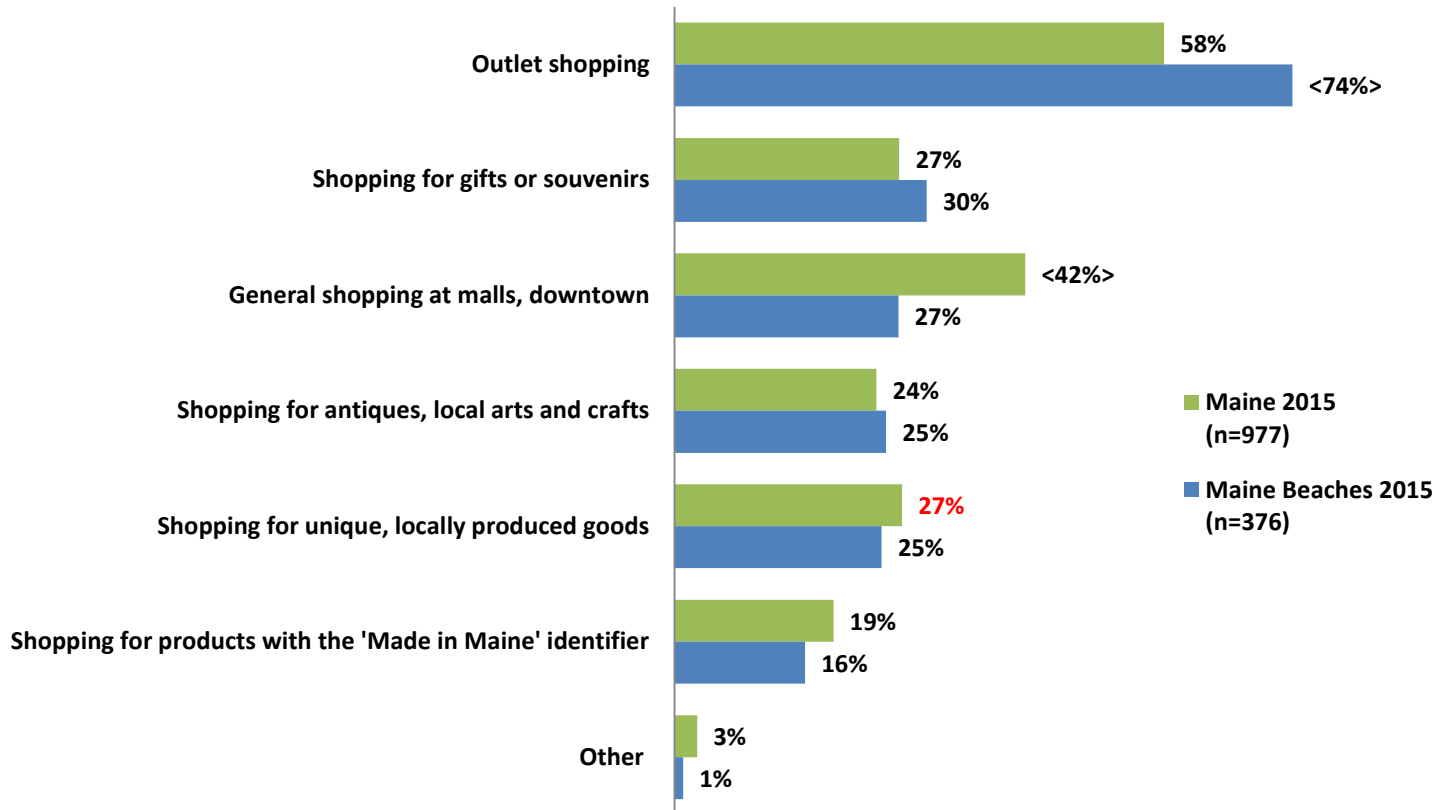
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in four day visitors who are interested in shopping did some *outlet shopping* during their trip to the Maine Beaches.

- Maine Beaches day visitors are more likely to *shop at the outlets* and less likely to *shop at malls or downtown* compared to visitors to the State of Maine overall.

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.*

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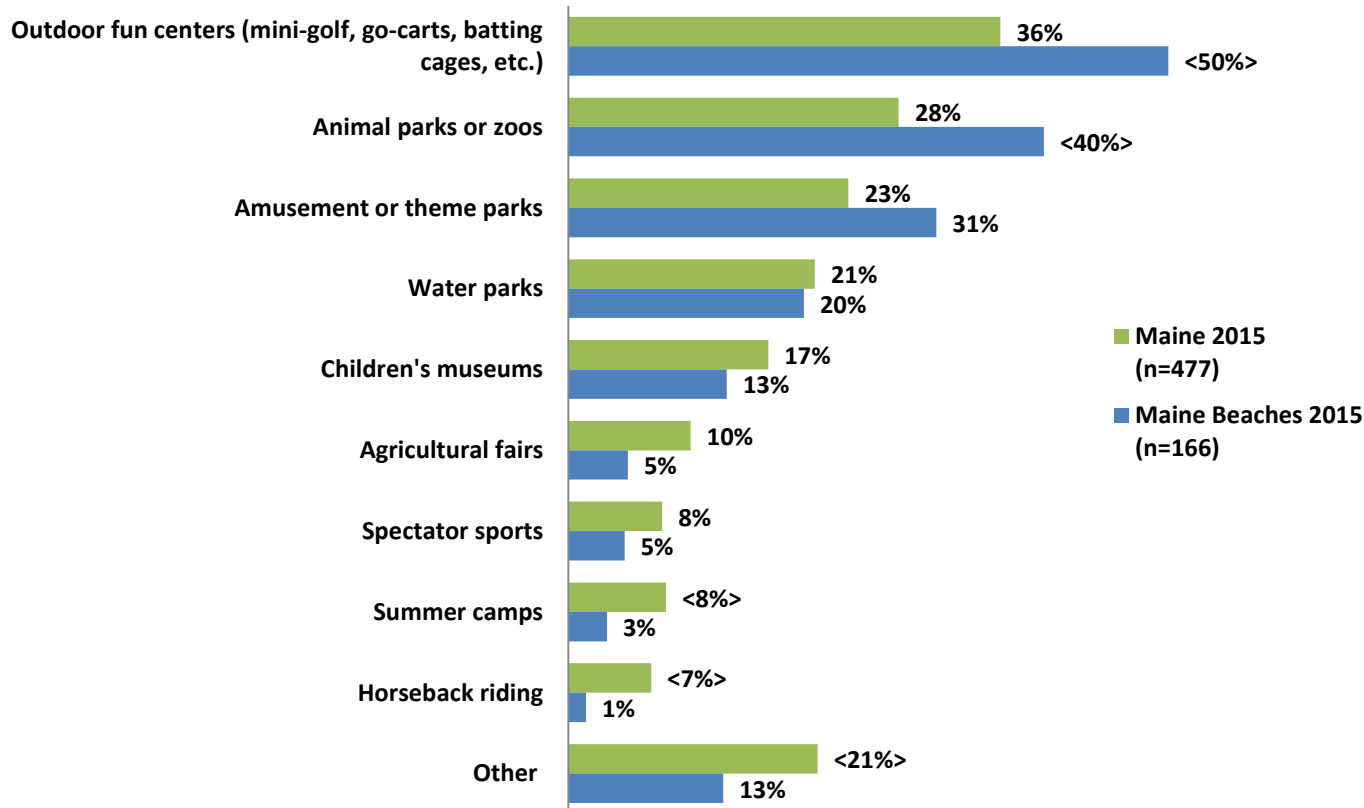
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- These two family fun/children’s activities are also more popular among day visitors to the Maine Beaches region than they are among day visitors to the State overall.

Family Fun/Children’s Activities

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

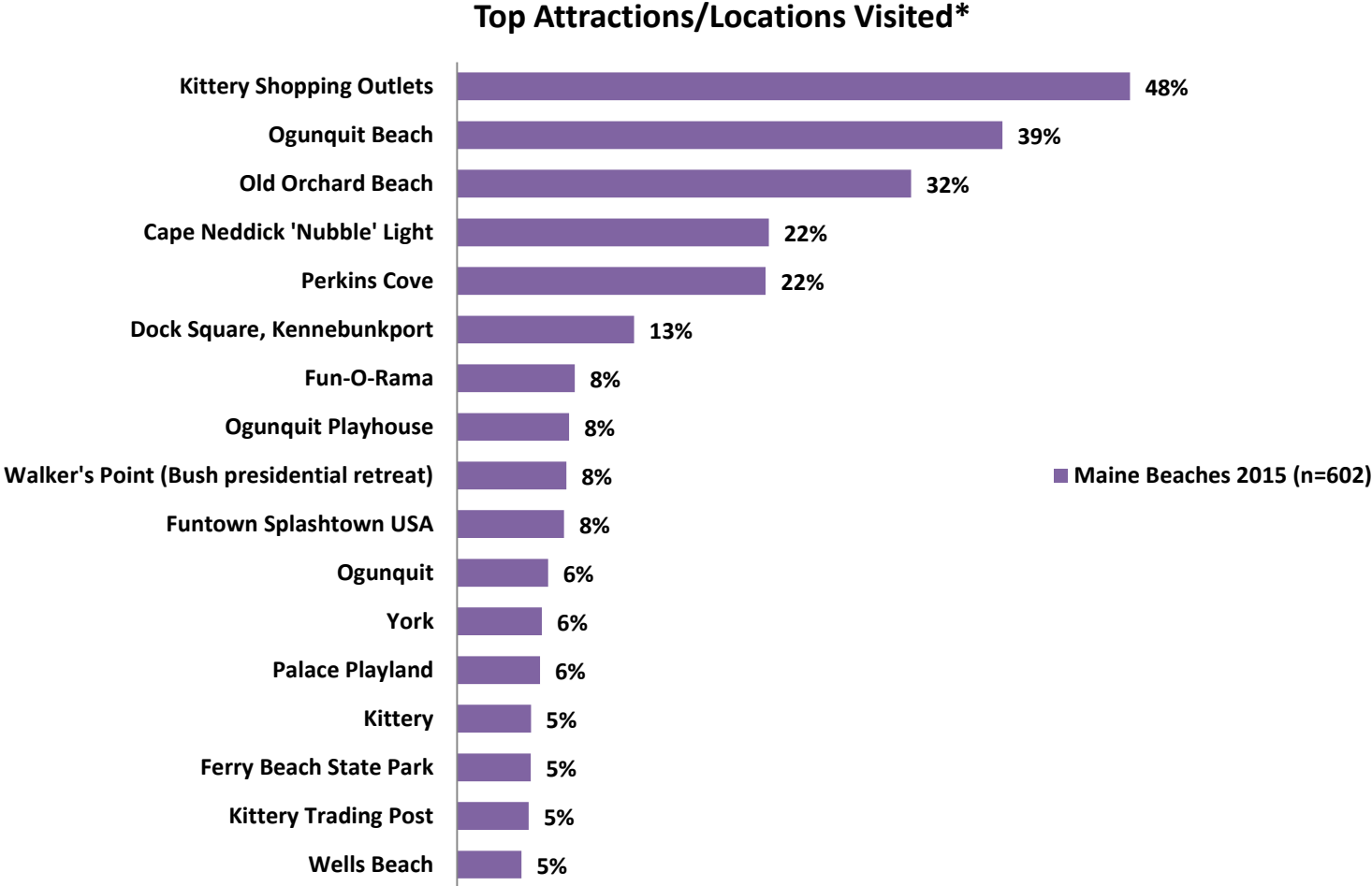


Q19. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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.

Half of day visitors to the Maine Beaches region visit the *Kittery Shopping Outlets* while visiting the region.



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

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 are from **New England, specifically Massachusetts.**

Visitor Demographics

- Overnight visitors to the region are **older** on average than visitors to the State of Maine as a whole.
- Overnight and 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 are **more** likely to be **repeat visitors**.

Trip Interest Areas – Overnight and Day Visitors

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

Trip Interest Areas – Overnight Visitors

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

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**

Overnight Visitors

- More likely to place importance on **food/beverage/culinary activities**
- Less likely to place importance on **active outdoor 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
 - Motor boating
 - Summer camps
 - Horseback riding

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- Less likely to be:
 - Taking nature cruises or tours
 - Going to local brew pubs or craft breweries
 - Visiting farmer’s markets
 - Enjoying local food at fairs or festivals
 - Exploring State and National Parks
 - Riding all-terrain vehicles
 - Snowshoeing
 - Spectator sports

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More likely to be:**
 - Outdoor fun centers
 - Animal parks or zoos
- **Less likely to be:**
 - Viewing fall colors
 - Eat farm to table or organic cuisine
 - Fishing (ocean, lake, stream, river, ice)
 - Water skiing or jet skiing
 - Sailing
 - Alpine skiing or snowboarding



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