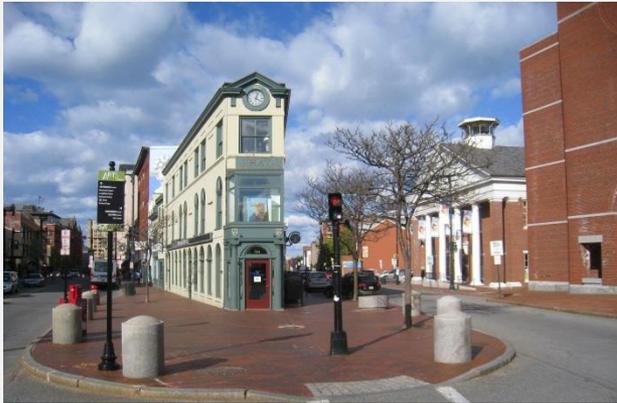




Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report

Regional Insights: Greater Portland & Casco Bay



Prepared by



April 2017

Table of Contents

Research Objectives and Methodology	3
Overnight Visitors:	
Traveler Description	7
Trip Experience	12
Day Visitors:	
Traveler Description	26
Trip Experience	31
Comparison of Greater Portland/Casco Bay Visitors to all Maine Visitors	44

Research Objectives and Methodology

Research Objectives and Methodology

Three distinct online surveys are used to accomplish the five primary goals of the State of Maine’s visitor tracking research.

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

Description of Survey Instruments

National Travel Survey

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

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine’s borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

Research Objectives and Methodology

- Survey results were collected during calendar year 2016, for travel to Maine occurring between December 2015 and November 2016. The number of respondents participating in each survey statewide is:

Research Component	2016 Completed Surveys
Overnight Visitor Survey	2,909
Day Visitor Survey	1,762
National Travel Survey	21,910

Research Objectives and Methodology

- The following report summarizes the results among visitors to the **Greater Portland & Casco Bay** tourism region during 2016, including:
 - 290 overnight visitors, and
 - 209 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 < >. (A statistically significant difference means the observed difference is more than would be expected by chance 95 out of 100 times.)
- Statistically significant differences between 2015 and 2016 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 45 years old and have annual household incomes around \$100,000. Over two-thirds have at least a college degree.
- Overnight visitors to Greater Portland & Casco Bay trend older than visitors to Maine overall. They have similar annual incomes, but are less likely to be employed full-time than visitors to Maine overall.

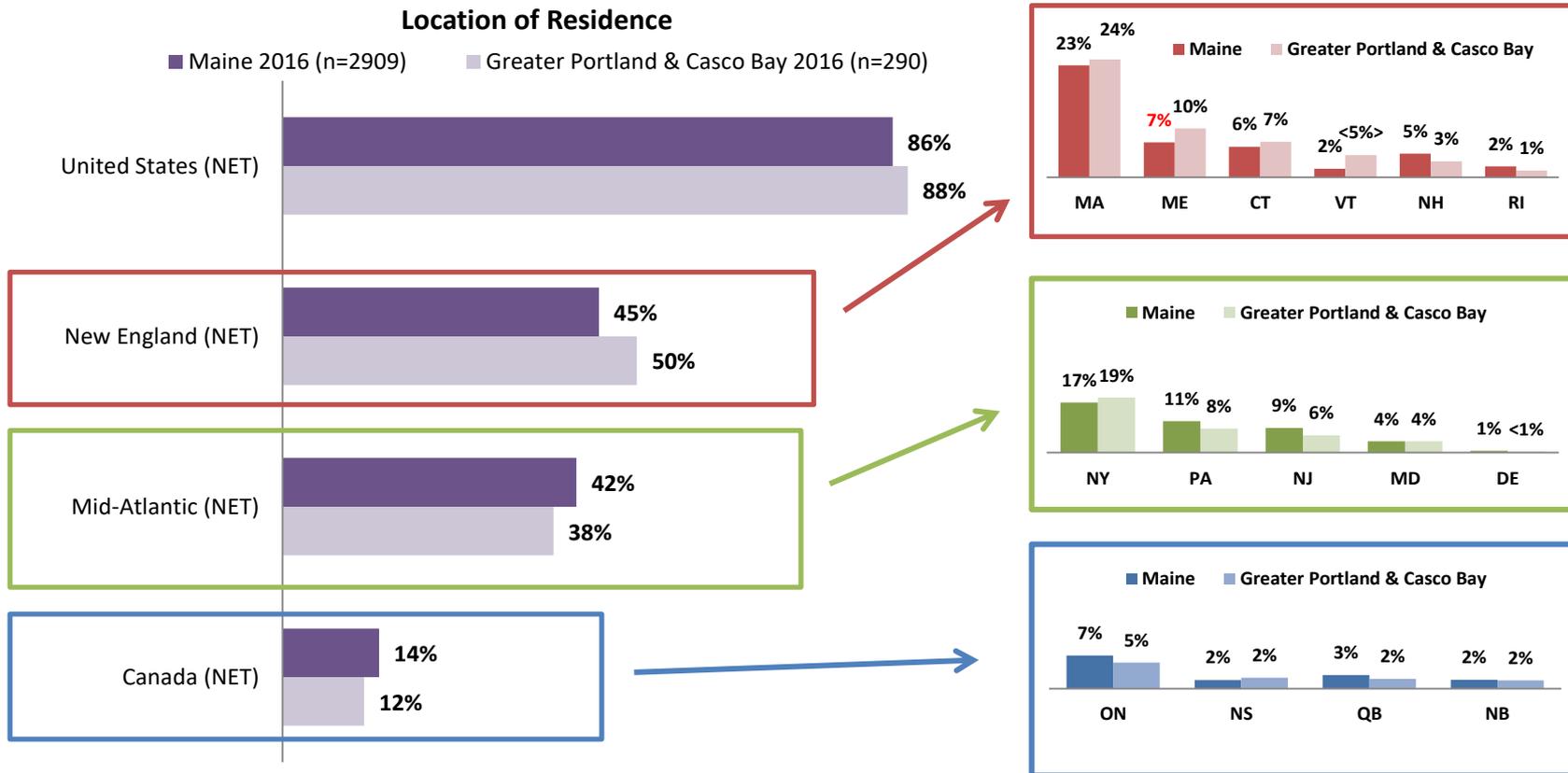
Overnight Visitors	Maine 2016 (n=2909)	Greater Portland & Casco Bay 2016 (n=290)
Age:		
< 35	34%	30%
35 - 44	22%	20%
45 - 54	18%	17%
55 +	26%	<33%>
Mean Age (Years)	42.8	<45.1>
Income:		
< \$50,000	20%	16%
\$50,000 - \$99,999	42%	43%
\$100,000 +	39%	41%
Mean Income	\$98,700	\$99,900
Female	60%	64%
College Degree or Higher	66%	69%
Married	56%	57%
Employed Full-Time	<66%>	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.

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

- Massachusetts, New York, and Maine 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 overnight visitors from Vermont than does the State of Maine as a whole.



State/ Province of Residence

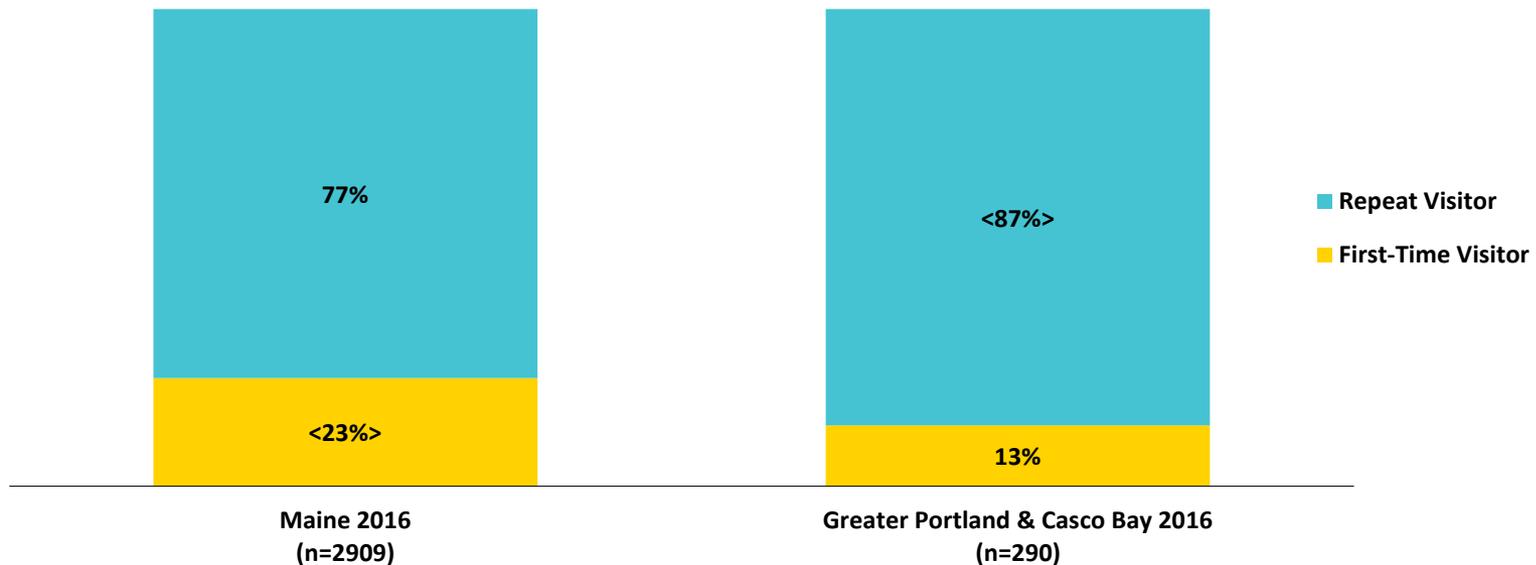
< > indicates a significant difference between subgroups at the 95% confidence level.

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.

- This tourism region attracts a higher proportion of repeat visitors than does the State of Maine as a whole (87% versus 77%).

Repeat vs. First-Time Visitors



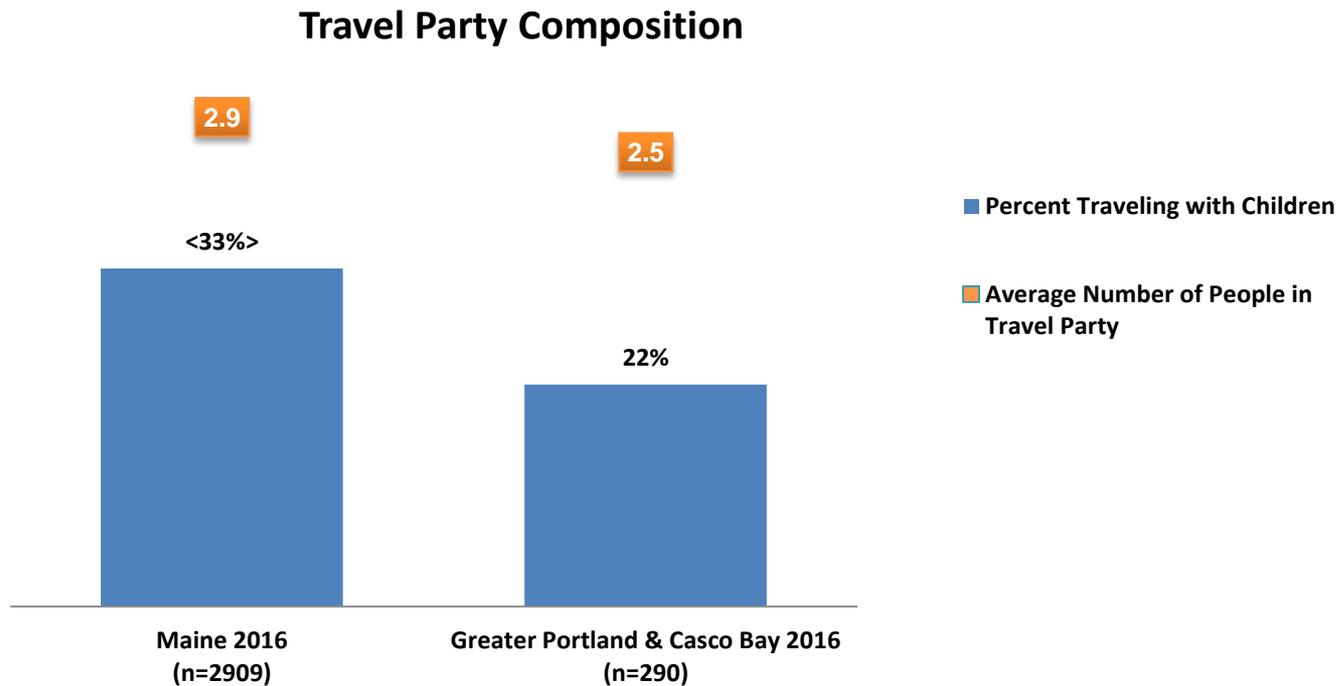
Q11. Was this your first visit in Maine?

< > 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.

One-fifth of overnight visitors to the Greater Portland region travel with children.

- Travel parties to the Greater Portland/Casco Bay region are less likely to include children than are travel parties to the State overall.



Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q22. How many of these people were: Children?

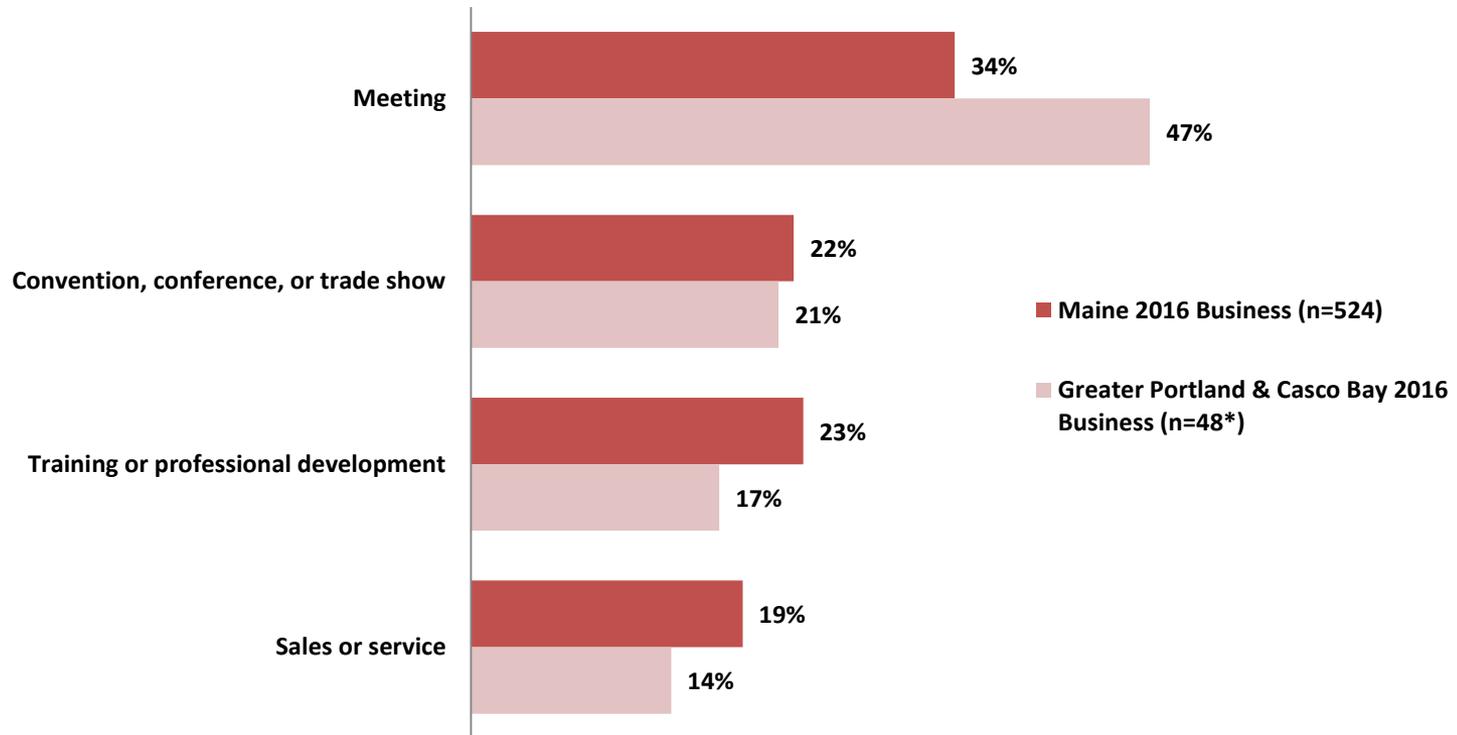
< > indicates a significant difference between subgroups at the 95% confidence level.

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

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?

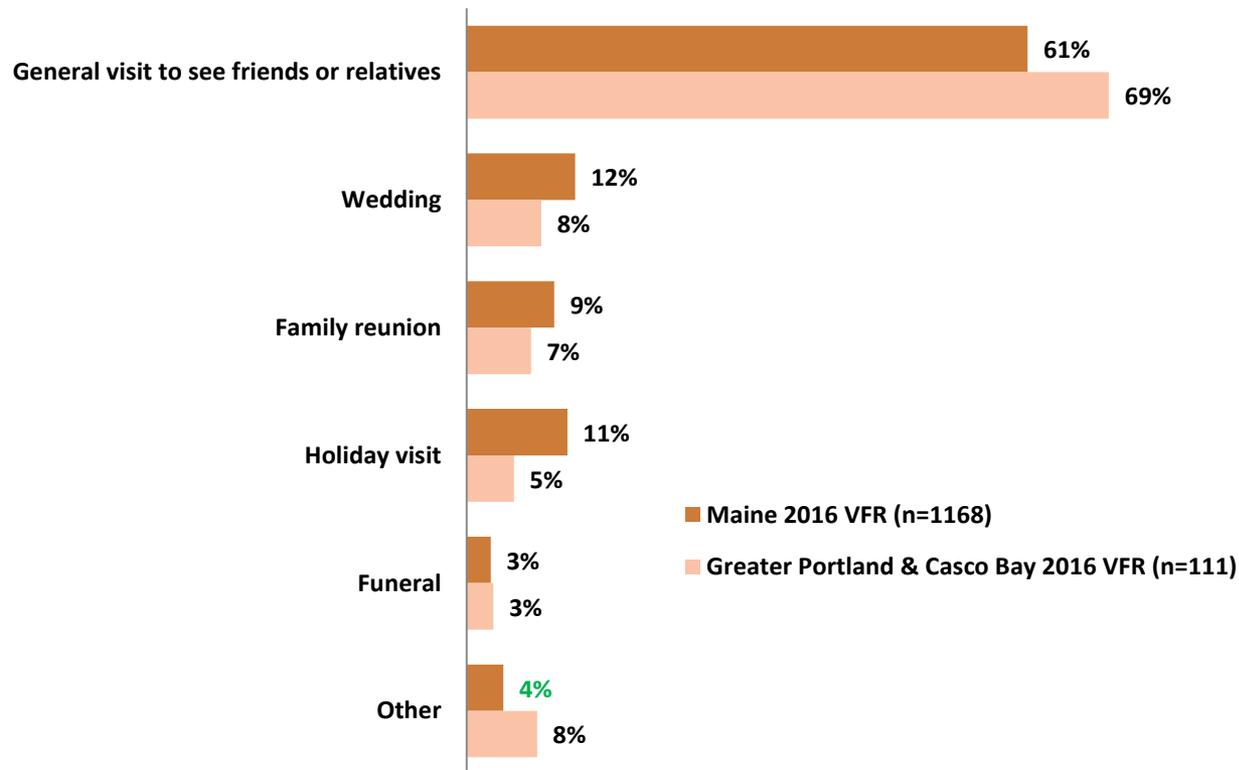
< > indicates a significant difference between subgroups at the 95% confidence level.

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

*Please note small sample size. Use caution when interpreting results.

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*.

Primary Purpose of Overnight VFR Trips



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

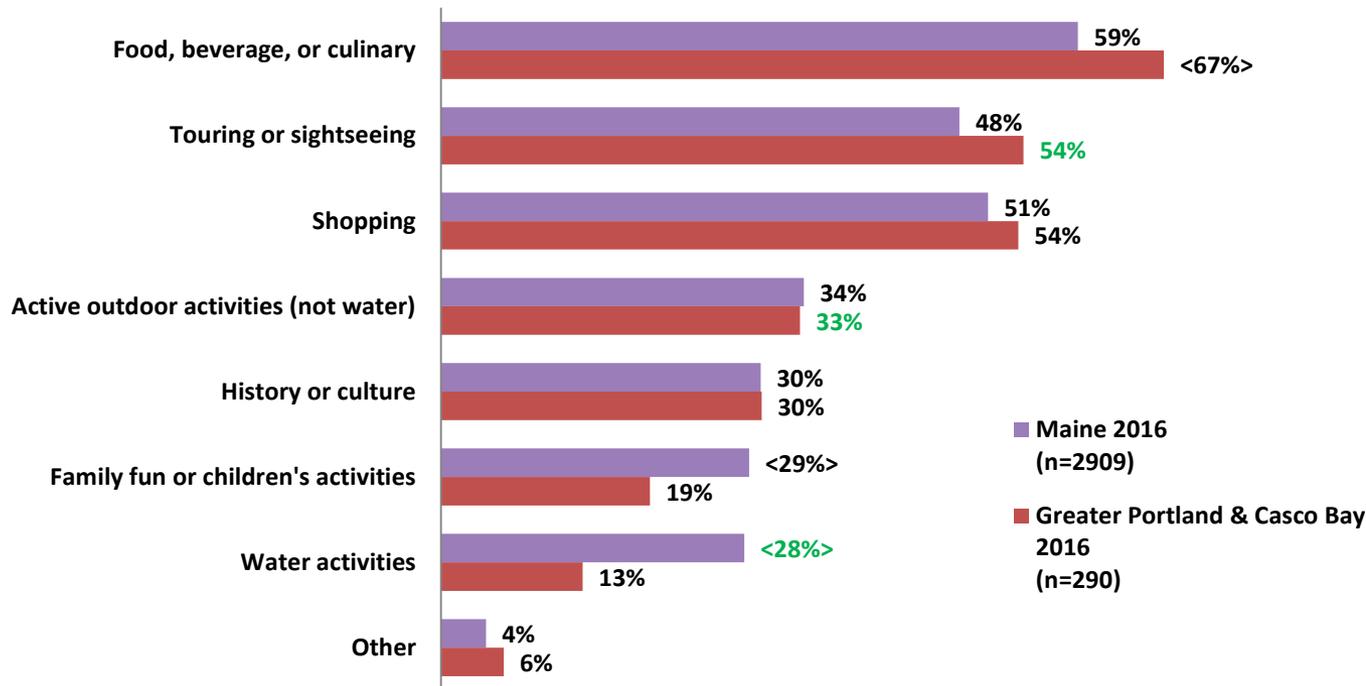
< > indicates a significant difference between subgroups at the 95% confidence level.

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

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

- *Food/beverage/culinary* activities are even more popular among visitors to the Greater Portland region than they are among visitors to the State as a whole.
- Lower proportions of overnight visitors to the region are interested in *family fun/children's activities* and *water activities* compared to visitors to the State overall.

2016 Interest Areas



Most Important Interest Area Greater Portland & Casco Bay	
Food, beverage, or culinary	48%
Touring or sightseeing	41%
Shopping	25%
Active outdoor activities (not water)	23%
History or culture	17%
Family fun or children's activities	51%
Water activities	24%
Other	98%

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

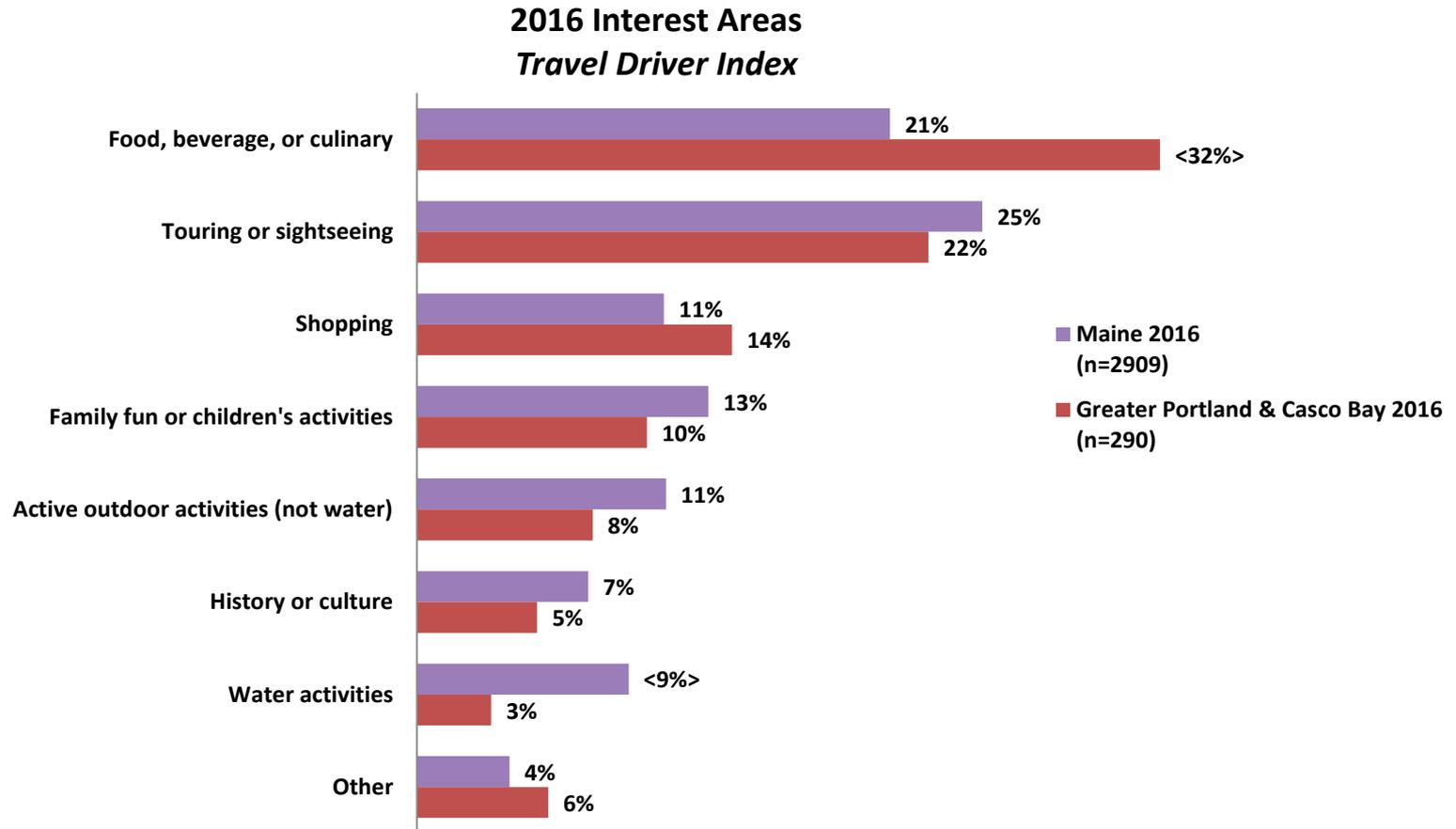
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

< > 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.

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

- When looking at both interest and importance, *food/beverage/culinary activities* are more important for visitors to this region than for visitors to the State as a whole, while *water activities* are less important.



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

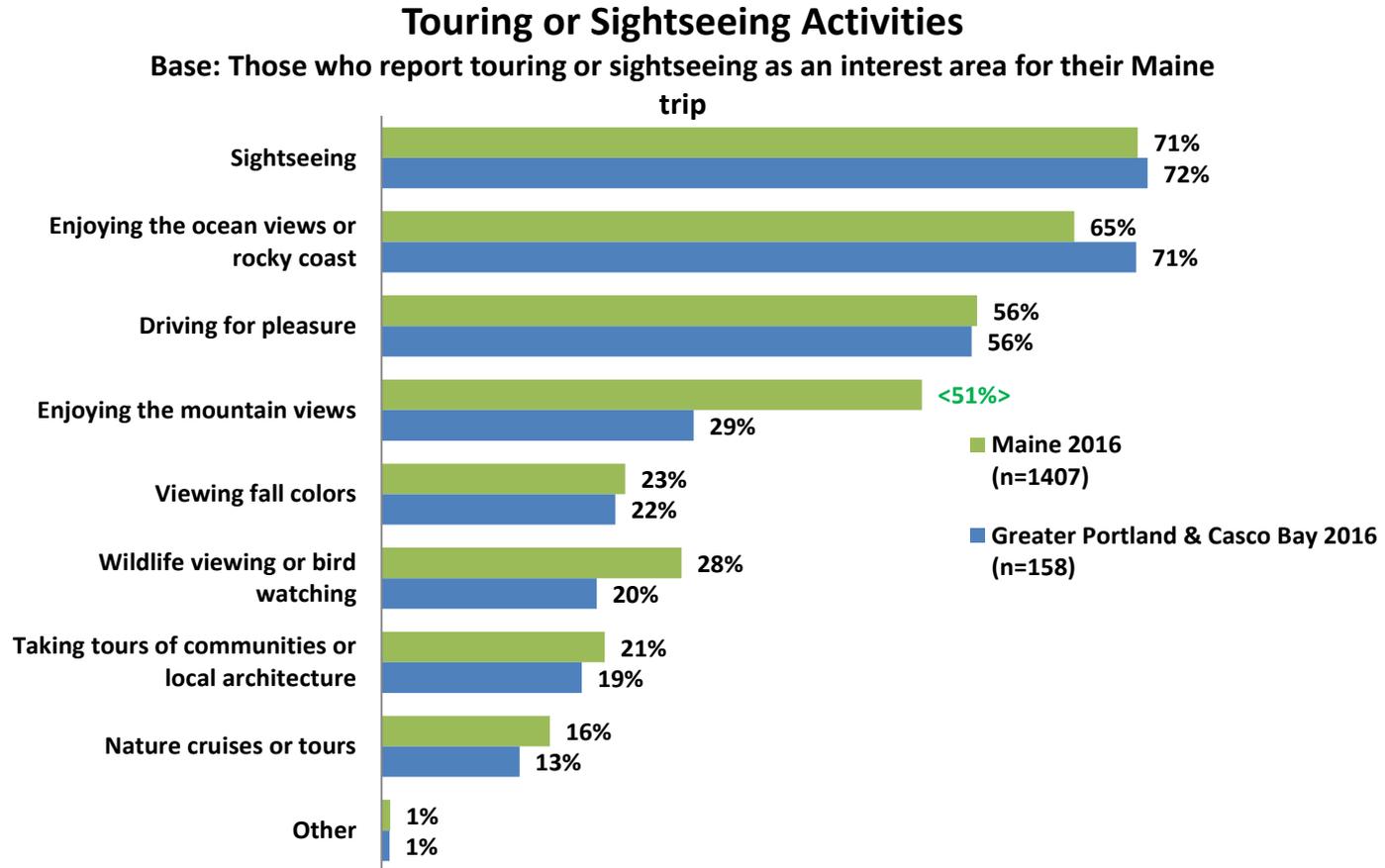
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 16

< > 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.

Sightseeing and enjoying the ocean views/rocky coast 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* while visiting.



Q34. 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.

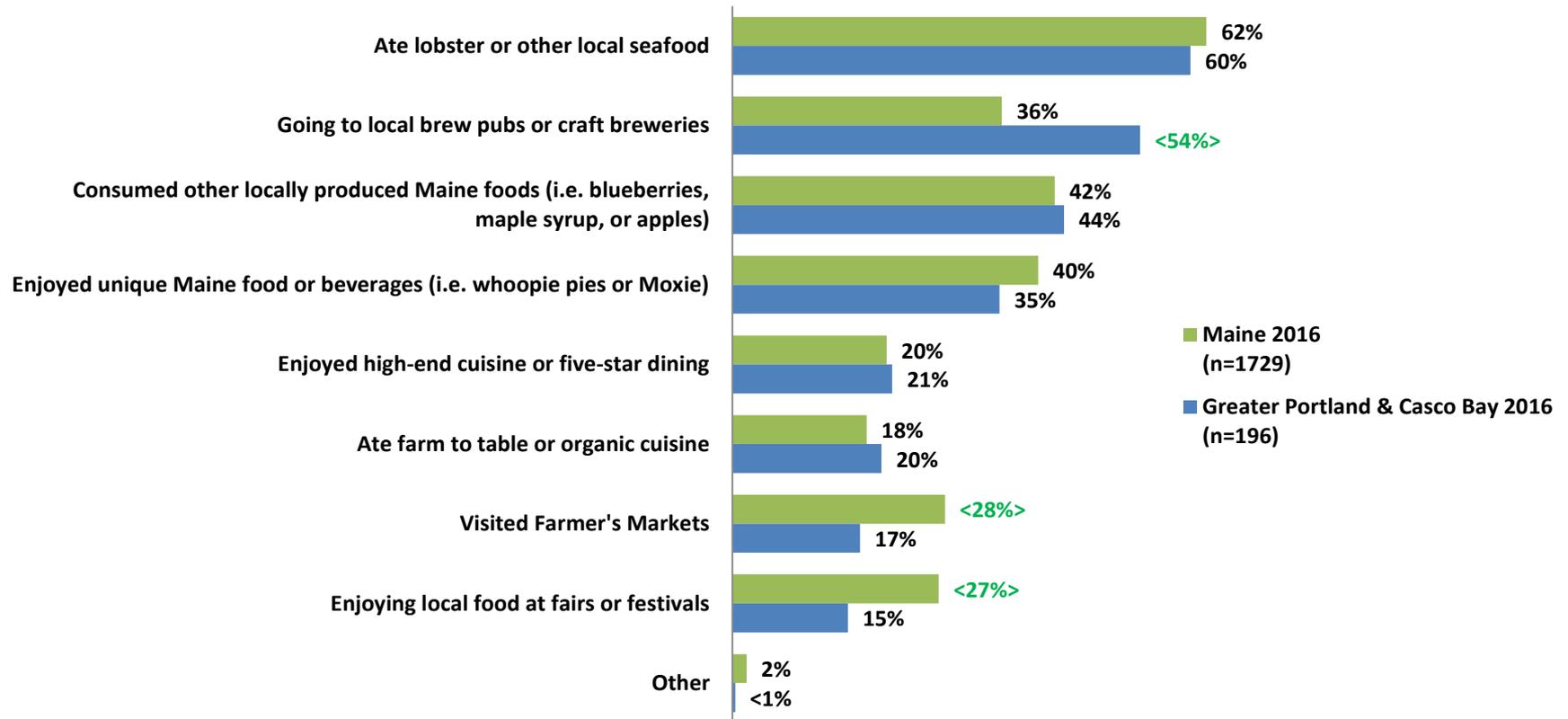
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Eating lobster or other local seafood is the most common food/beverage/culinary activity in this region, followed by going to local brew pubs or craft breweries.

- Local brew pubs and craft breweries are more popular among visitors to the Greater Portland/Casco Bay region than among visitors to the State as a whole. Visiting Farmer's Markets and enjoying local food at fairs or festivals are both less popular among overnight visitors to this region.

Food, Beverage, or Culinary Activities

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



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

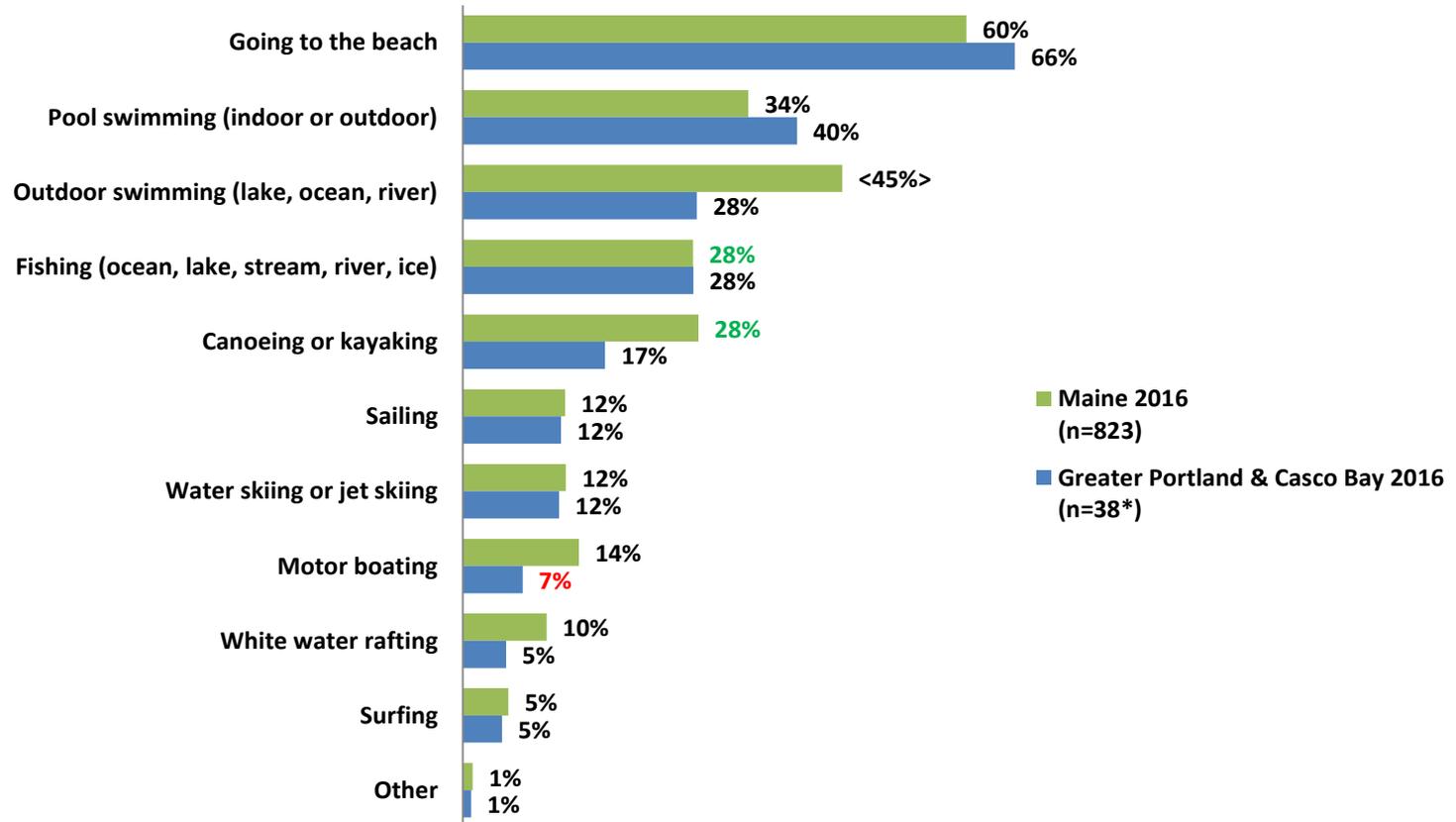
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Two 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 their Maine trip



Q34. 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.

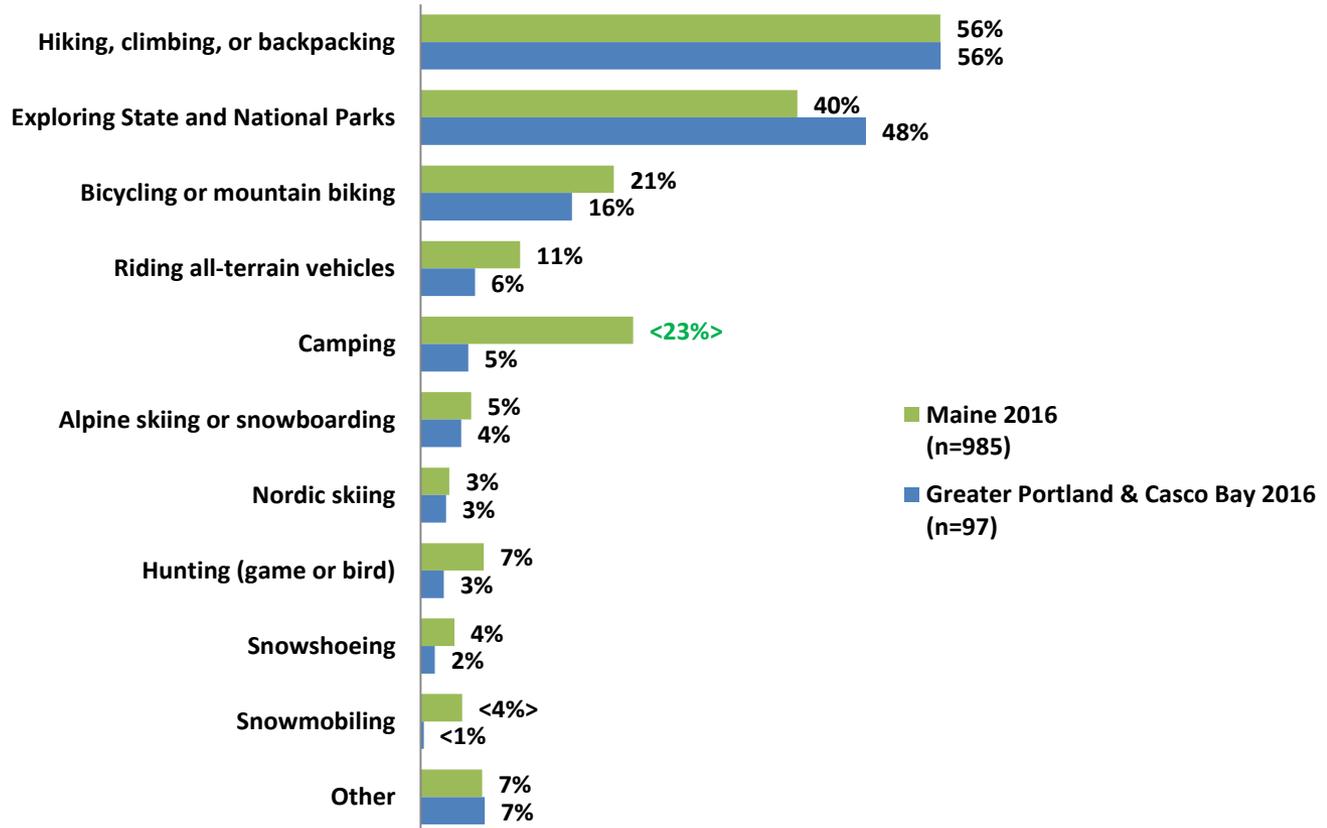
*Please note small sample size. Use caution when interpreting results.

More than half of overnight visitors interested in active outdoor activities spent time *hiking/climbing/backpacking* while in this region.

- Visitors to the Greater Portland region are less likely to *camp* while they are in the area, compared to visitors to the State as a whole.

Active Outdoor Activities – Non-Water

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



Q34. 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.

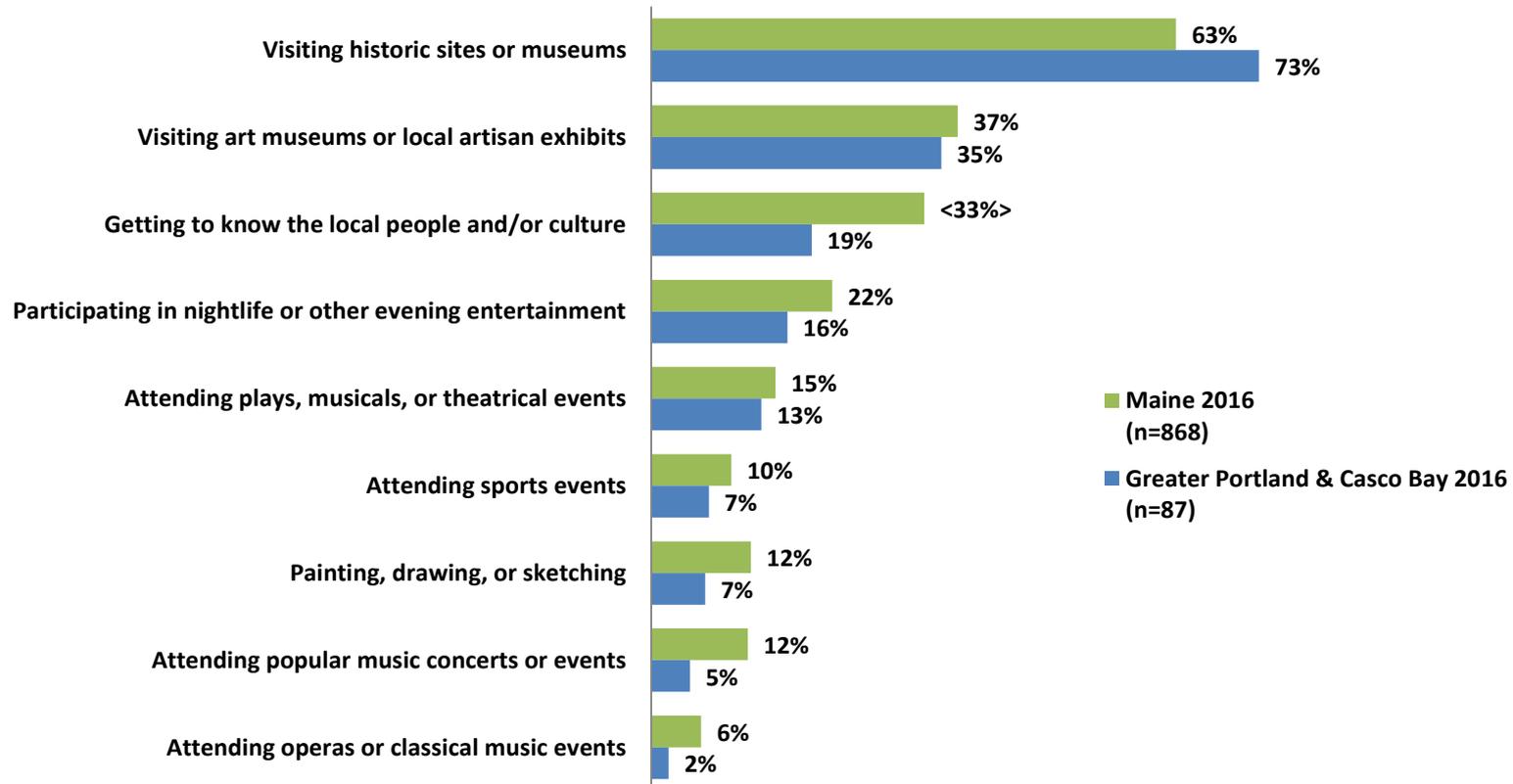
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in four overnight visitors interested in history or culture visit historic sites/museums while visiting this region.

- Among overnight visitors interested in history or culture activities, *getting to know the local people and/or culture* is less popular in the Greater Portland region than it is in the rest of the State.

History or Culture Activities

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



Q34. 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.

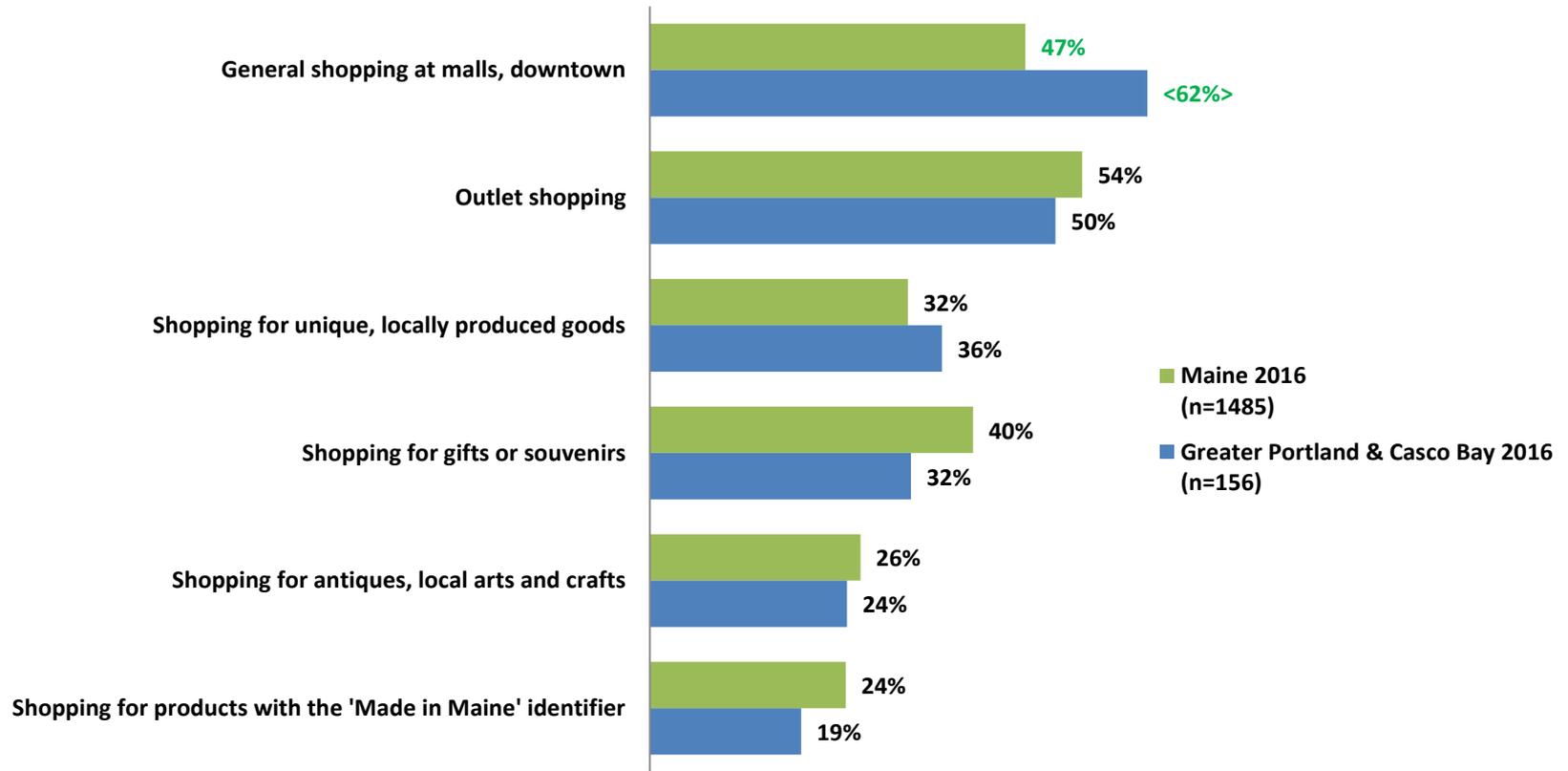
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nearly two-thirds of visitors interested in shopping do some general shopping at malls/downtown while in this region.

- General mall/downtown shopping is more popular for shopping enthusiasts in the Greater Portland region than it is for the State as a whole (62% versus 47%).

Shopping Activities

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



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

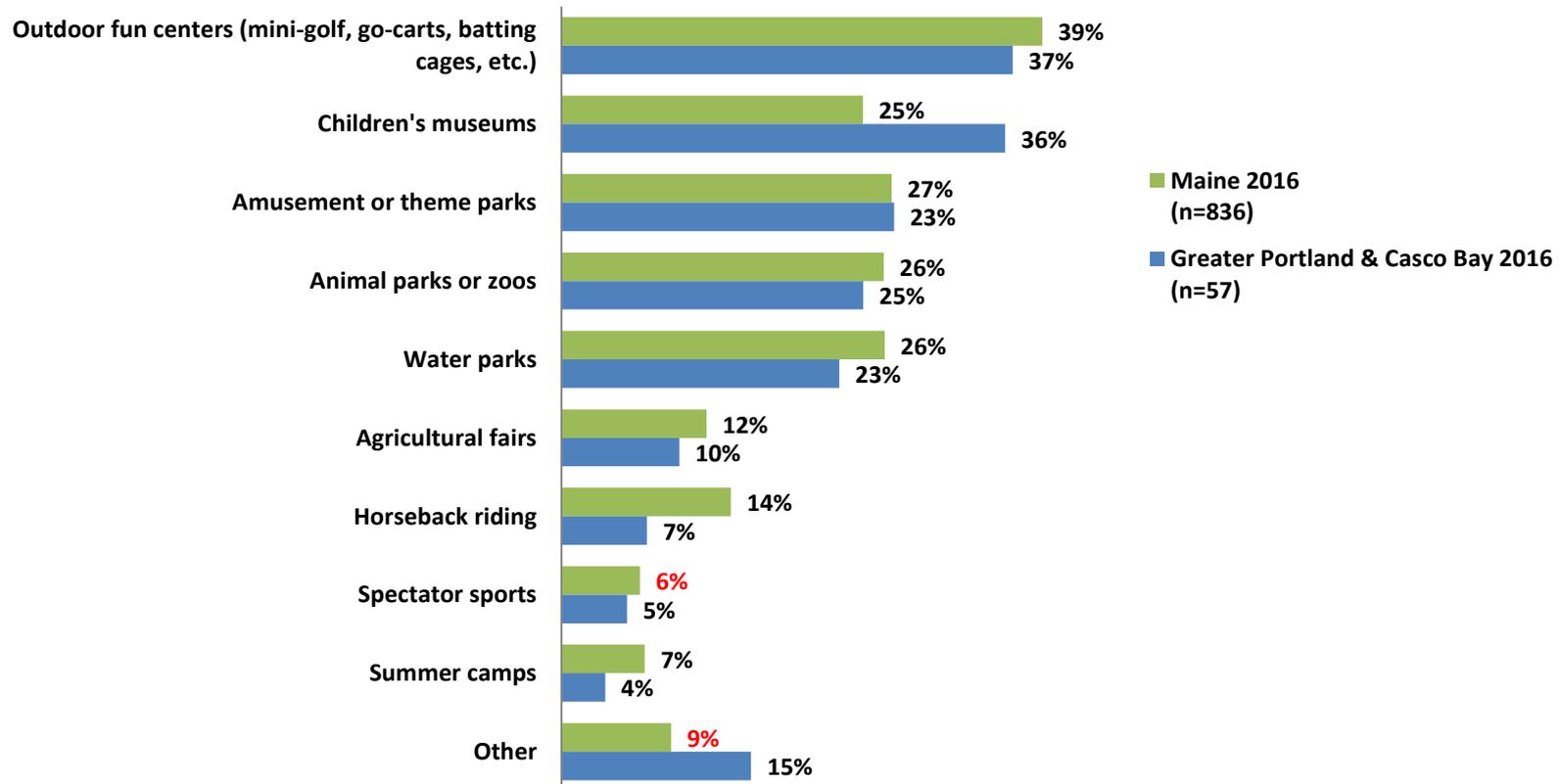
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Outdoor fun centers and children's museums are the most common family fun/children's activities among overnight visitors to this region.

Family Fun/Children's Activities

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



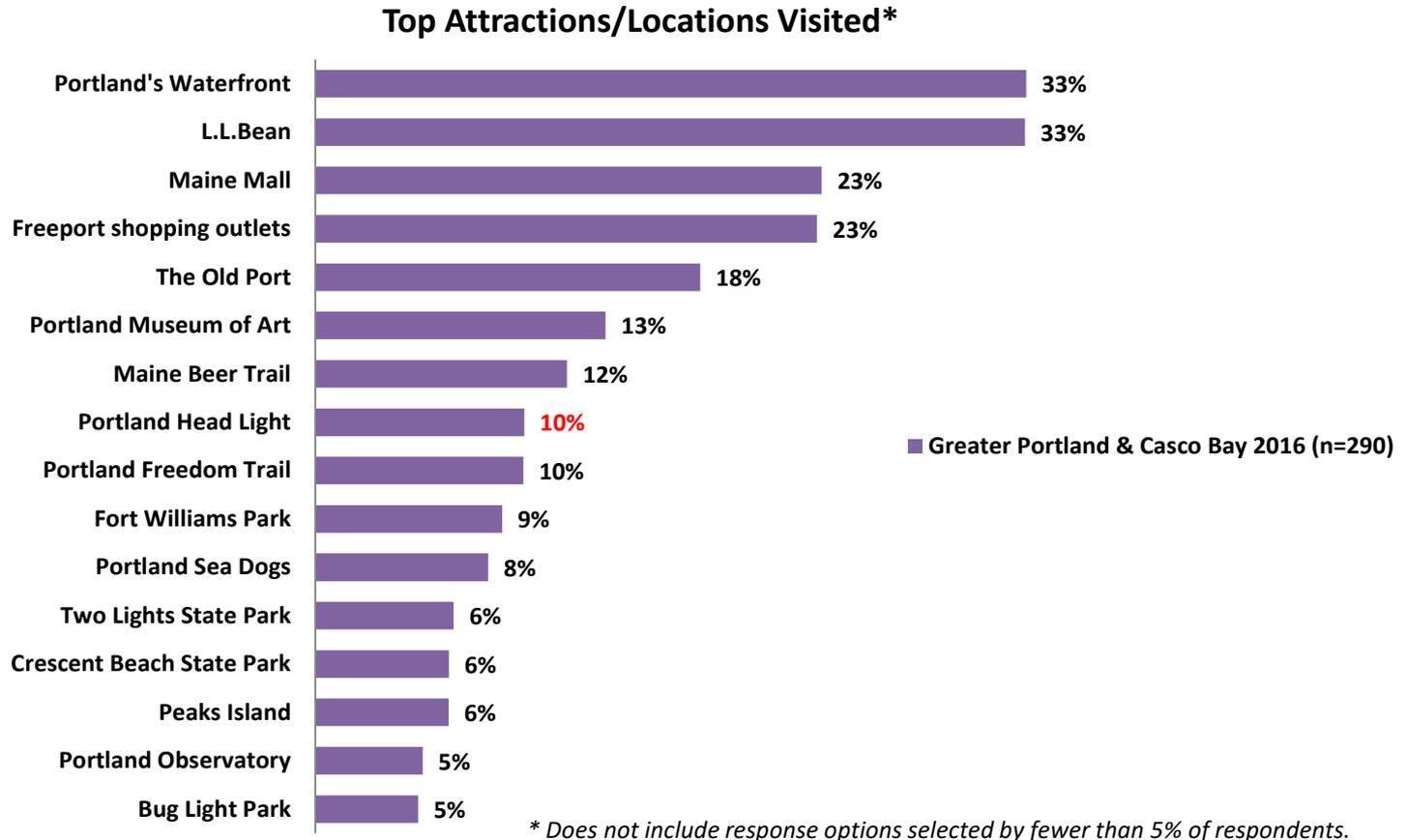
Q34. In which of the following activities did you participate during this trip? Please check all that apply.

< > 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 *Portland Head Light* in 2016 compared to 2015.



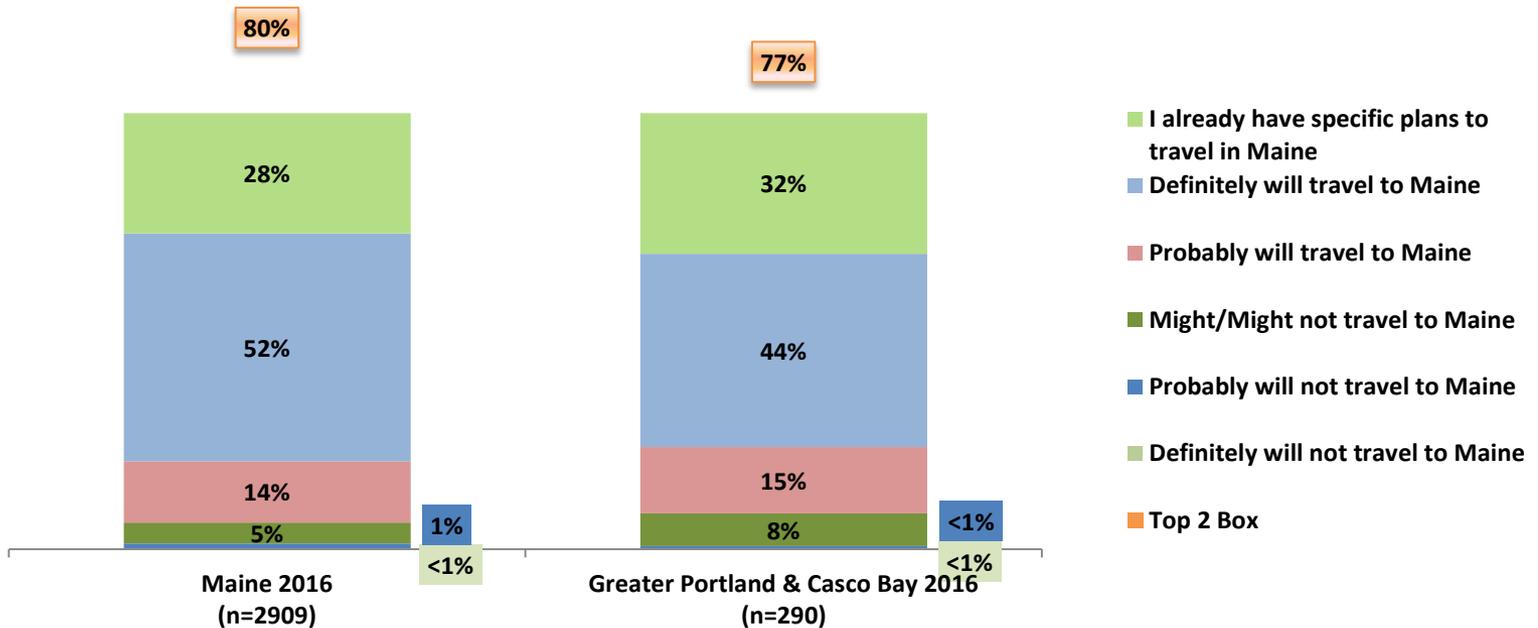
Q29: Within the region you visited, what specific attractions or locations did you visit? (Please check all that apply)

< > 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.

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

Future Travel Likelihood



Q41. How likely will you be to travel in Maine in the next two 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: Traveler Description

Day Visitor Demographics

- Day visitors to the Greater Portland & Casco Bay area are about 45 years old and earn just under \$99,000 annually. Three in four have a college degree, and half are employed full-time and married.
- Compared to day visitors to Maine overall, day visitors to this region have higher annual household incomes and are more likely to have a college degree.

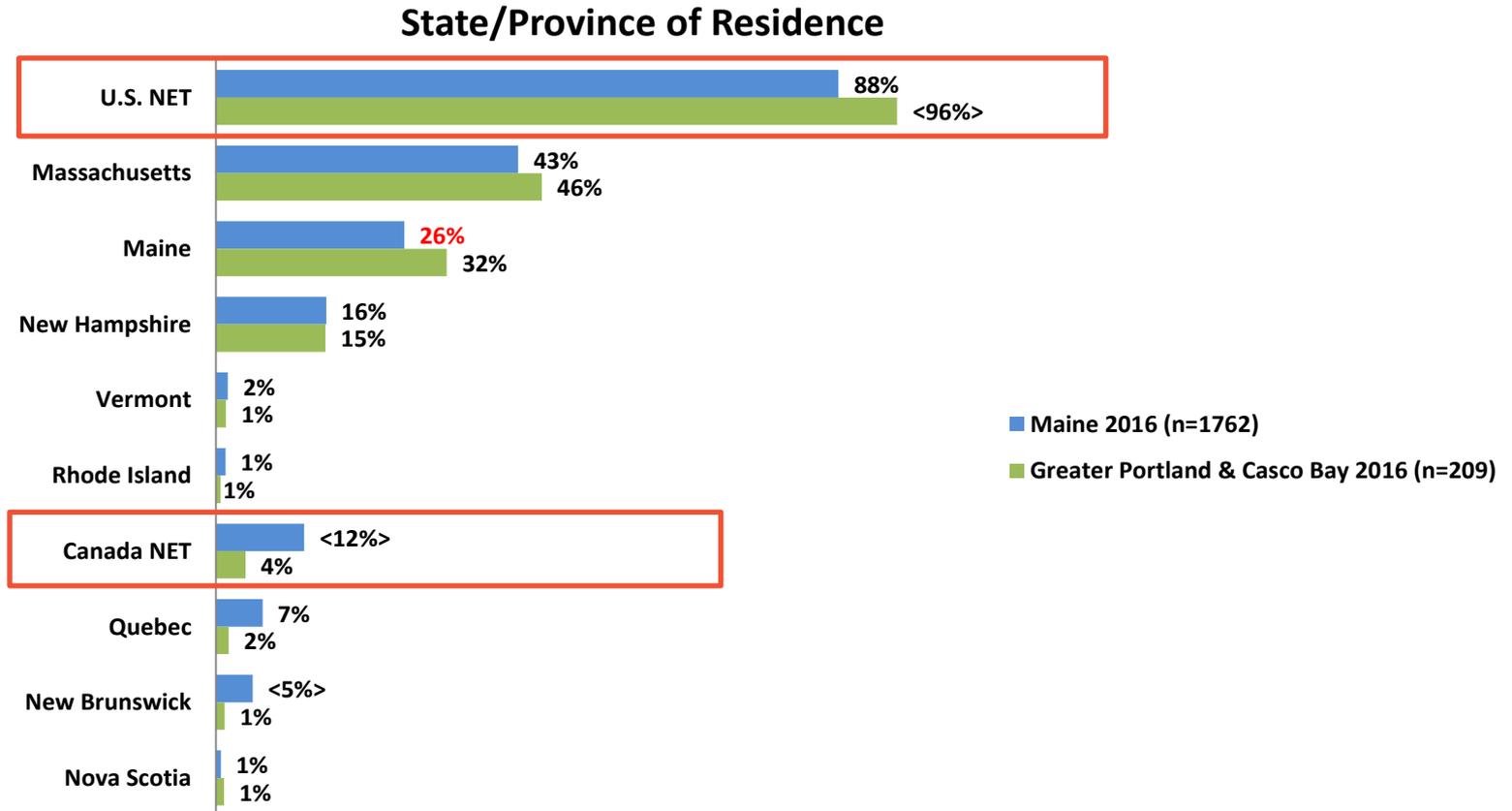
Day Visitors	Maine 2016 (n=1762)	Greater Portland & Casco Bay 2016 (n=209)
Age:		
< 35	28%	30%
35 - 44	18%	15%
45 - 54	19%	22%
55 +	35%	34%
Mean Age (Years)	46.0	45.3
Income:		
< \$50,000	26%	23%
\$50,000 - \$99,999	42%	42%
\$100,000 +	32%	35%
Mean Income	\$88,100	<\$98,700>
Female	75%	73%
College Degree or Higher	63%	<76%>
Married	56%	51%
Employed Full-Time	52%	50%

<> 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%).

- Nearly half of day visitors to the Greater Portland & Casco Bay area are from Massachusetts.



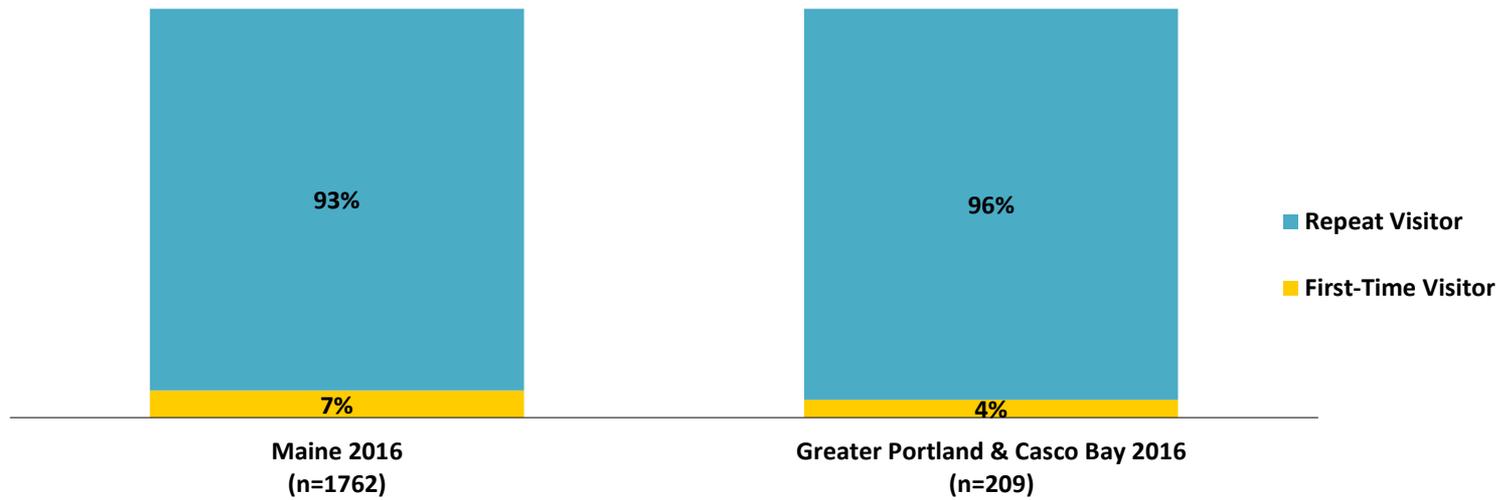
Q2. In what State or Province do you reside?

< > 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?

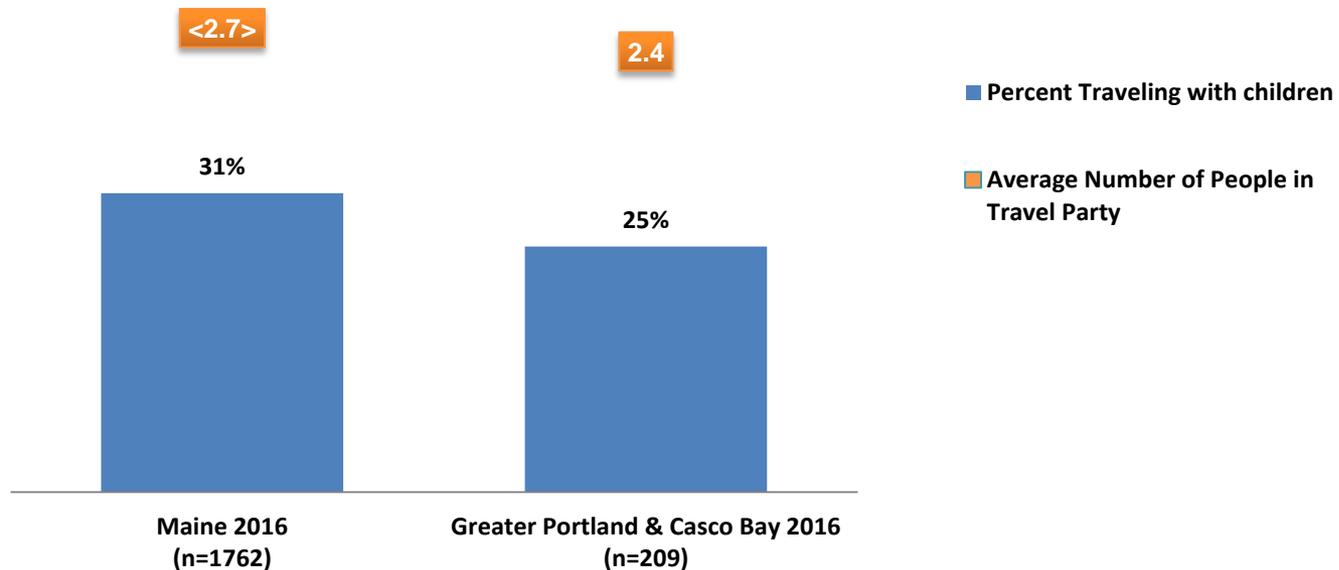
< > indicates a significant difference between subgroups at the 95% confidence level.

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

One-fourth of day visitors to this region travel with children, and party sizes average just over two people.

- On average, day visitors to the Greater Portland region travel in smaller groups than do day visitors to the State as a whole.

Travel Party Composition



Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q16. How many of these people were: Children

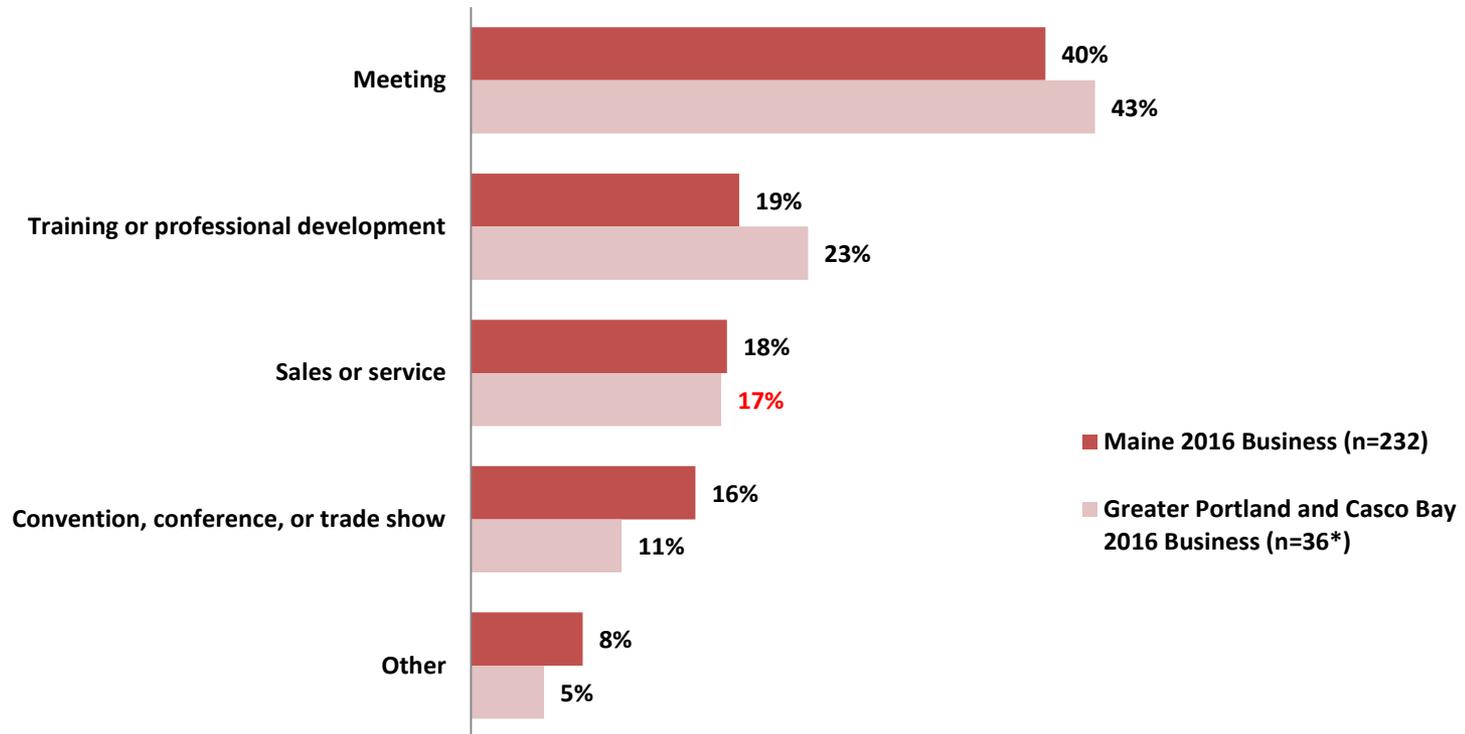
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Among business travelers, general *meetings* are the most frequently mentioned reason for a day trip to this region.

Primary Purpose of Day Business Trips



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

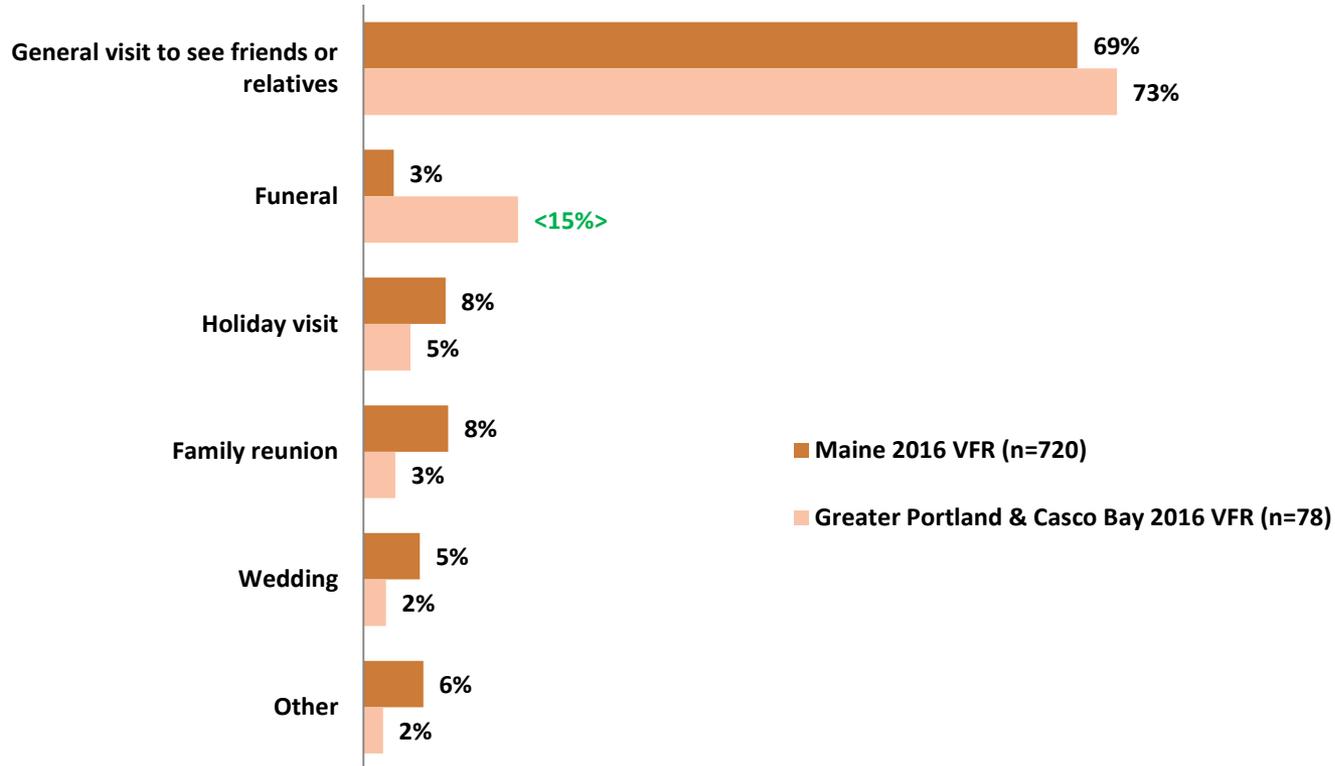
<> indicates a significant difference between subgroups at the 95% confidence level.

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. Use caution when interpreting results.

Three in four VFR day visitors to this region cite a *general visit to friends or relatives* as the primary purpose of their trip.

Primary Purpose of Day VFR Trips



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

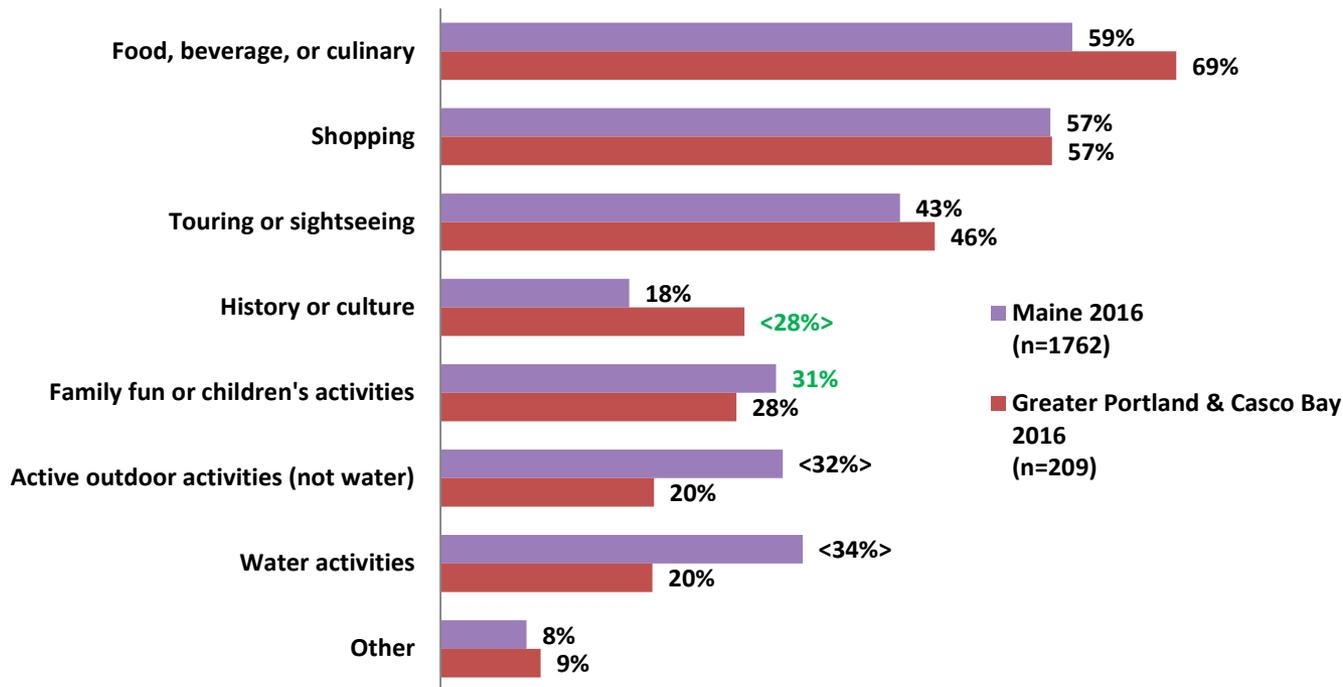
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Food/beverage/culinary activities and shopping are the two most common interest areas of day visitors to the Greater Portland 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* and *water activities*, and more likely to be interested in *history or culture* activities.

2016 Interest Areas



Most Important Interest Area Greater Portland & Casco Bay	
Food, beverage, or culinary	34%
Shopping	26%
Touring or sightseeing	55%
History or culture	31%
Family fun or children's activities	46%
Active outdoor activities (not water)	25%
Water activities	5%
Other	100%

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

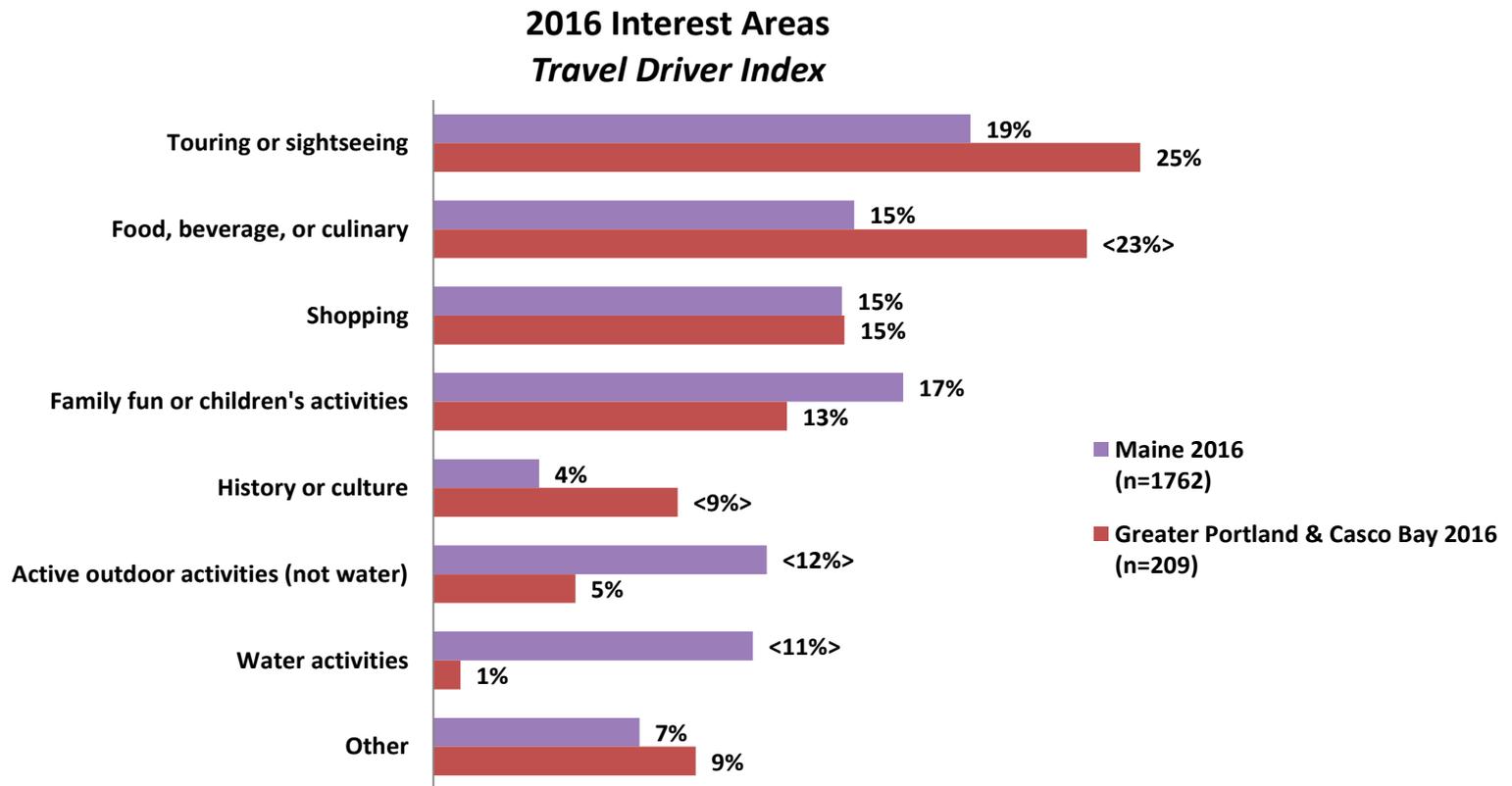
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34

< > 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.

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

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

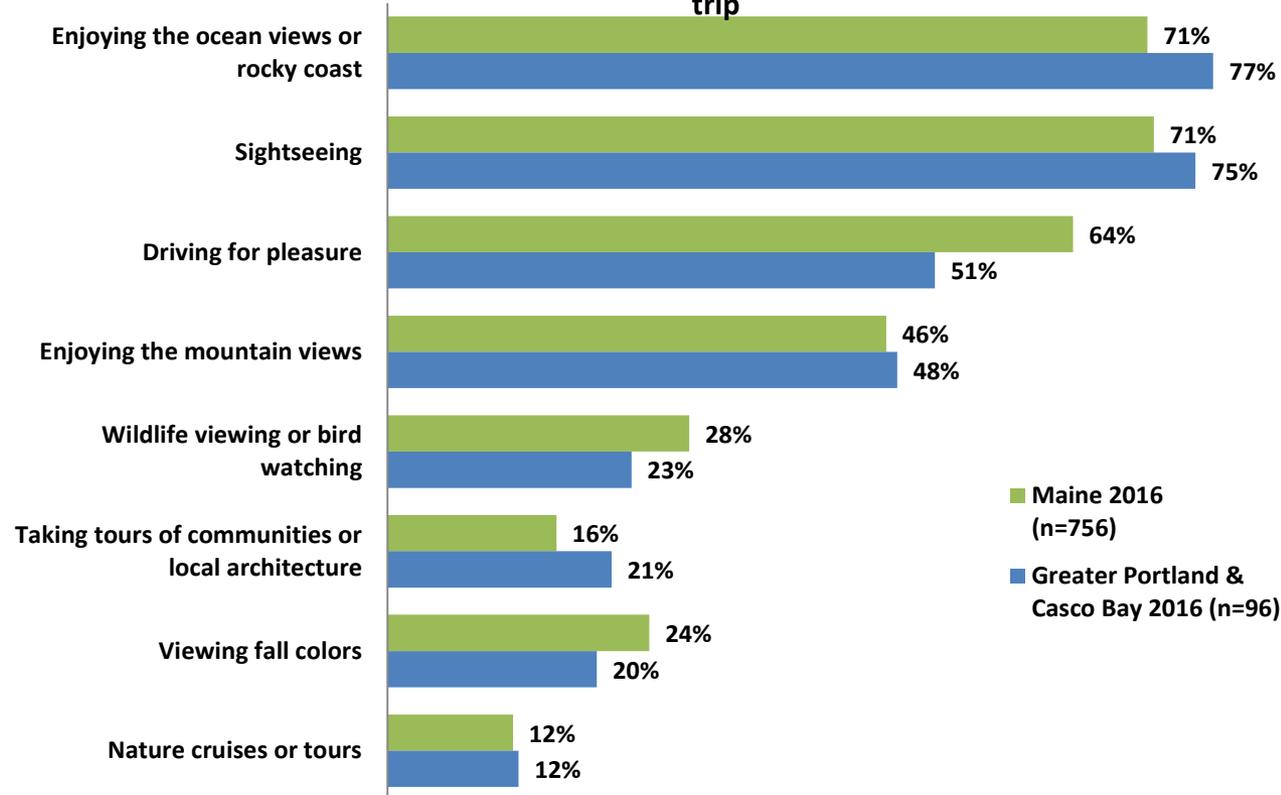


Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Among day visitors to this region interested in touring or sightseeing, the most common activities are *enjoying the ocean views/rocky coast* and *sightseeing*.

Touring or Sightseeing Activities

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



Q20. 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.

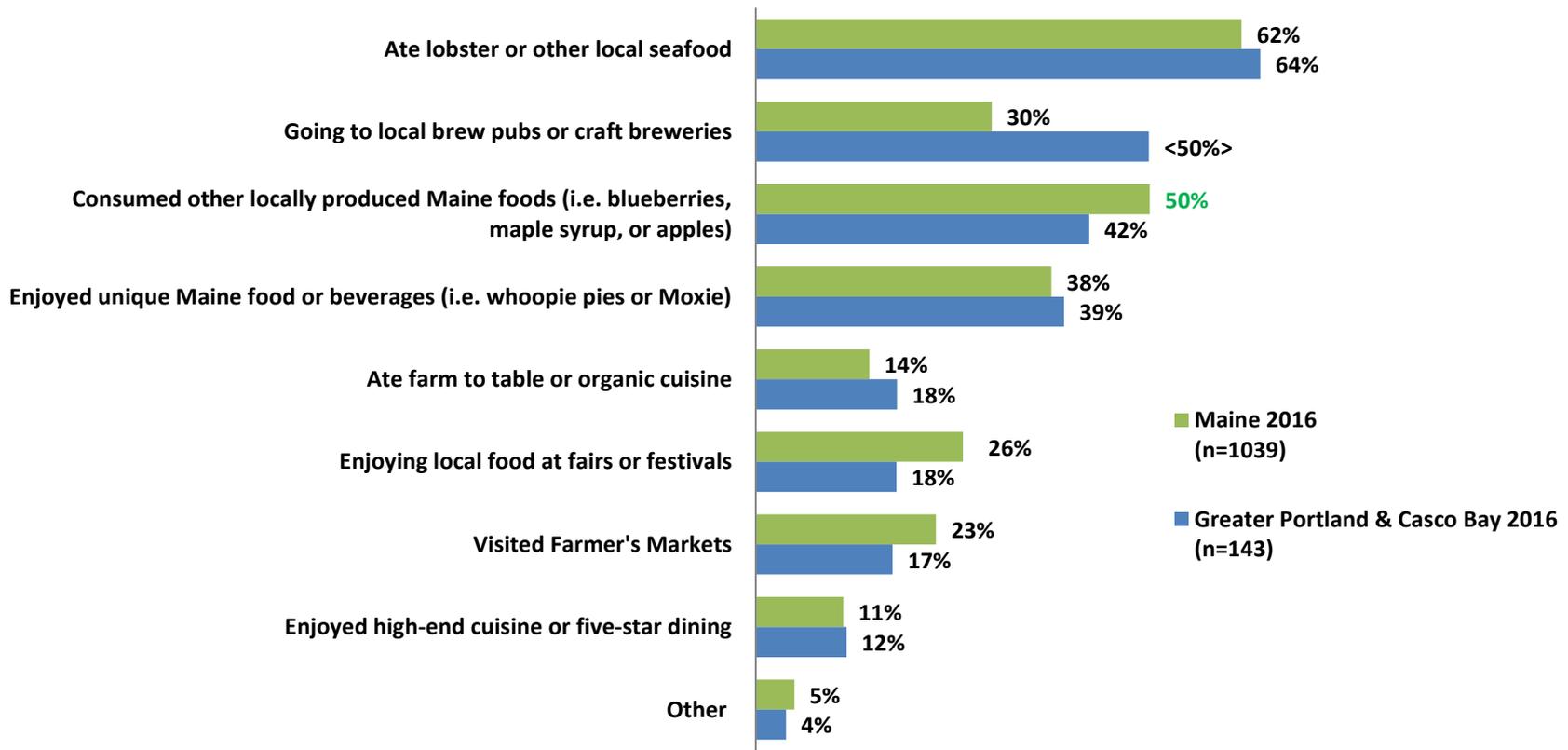
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two-thirds of day visitors to this region who are interested in food/ beverage/culinary activities *eat lobster or other local seafood while visiting.*

- Similar to overnight visitors, 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/craft brewery.*

Food, Beverage, or Culinary Activities

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

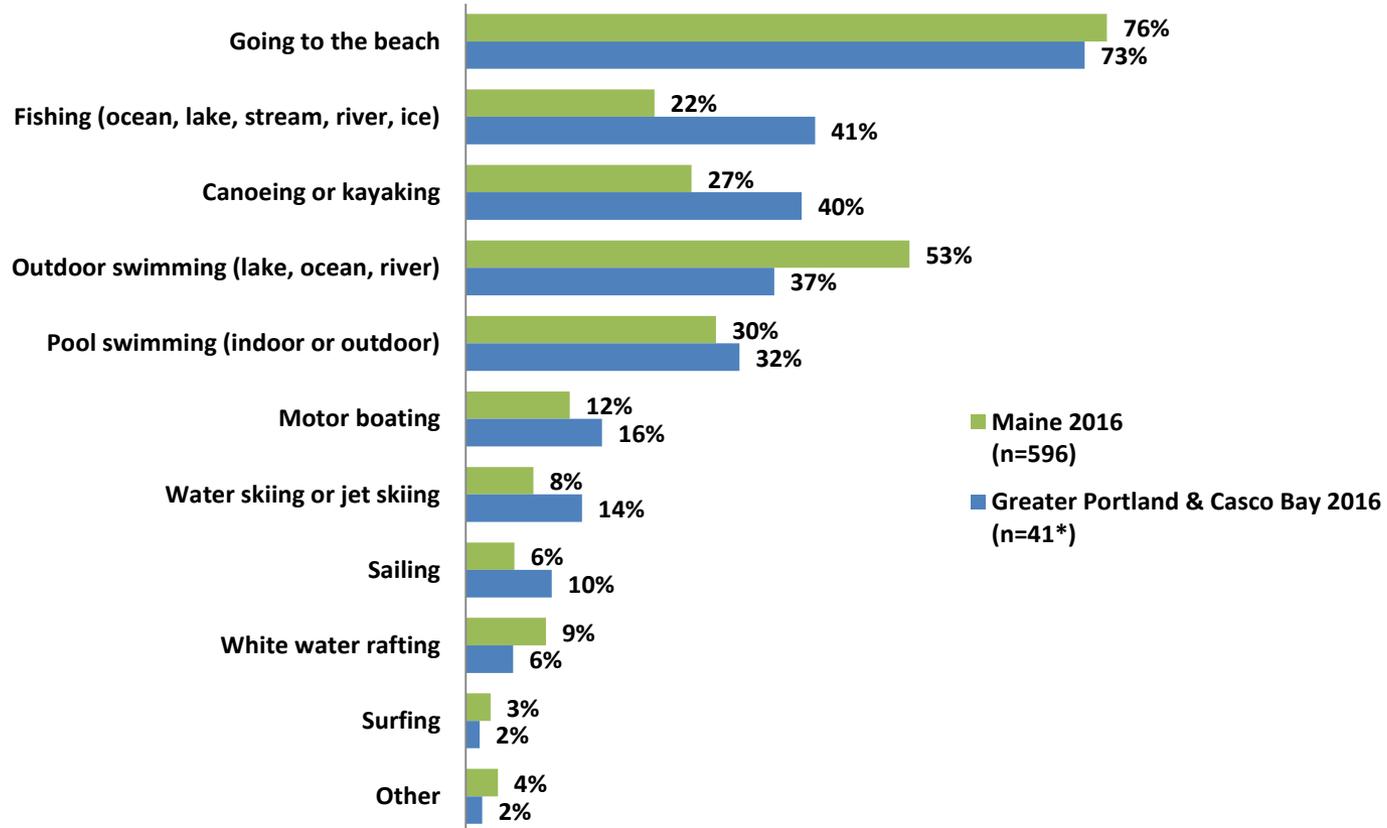
< > indicates a significant difference between subgroups at the 95% confidence level.

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, three-fourths go to the beach.

Water Activities

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



Q20. 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.

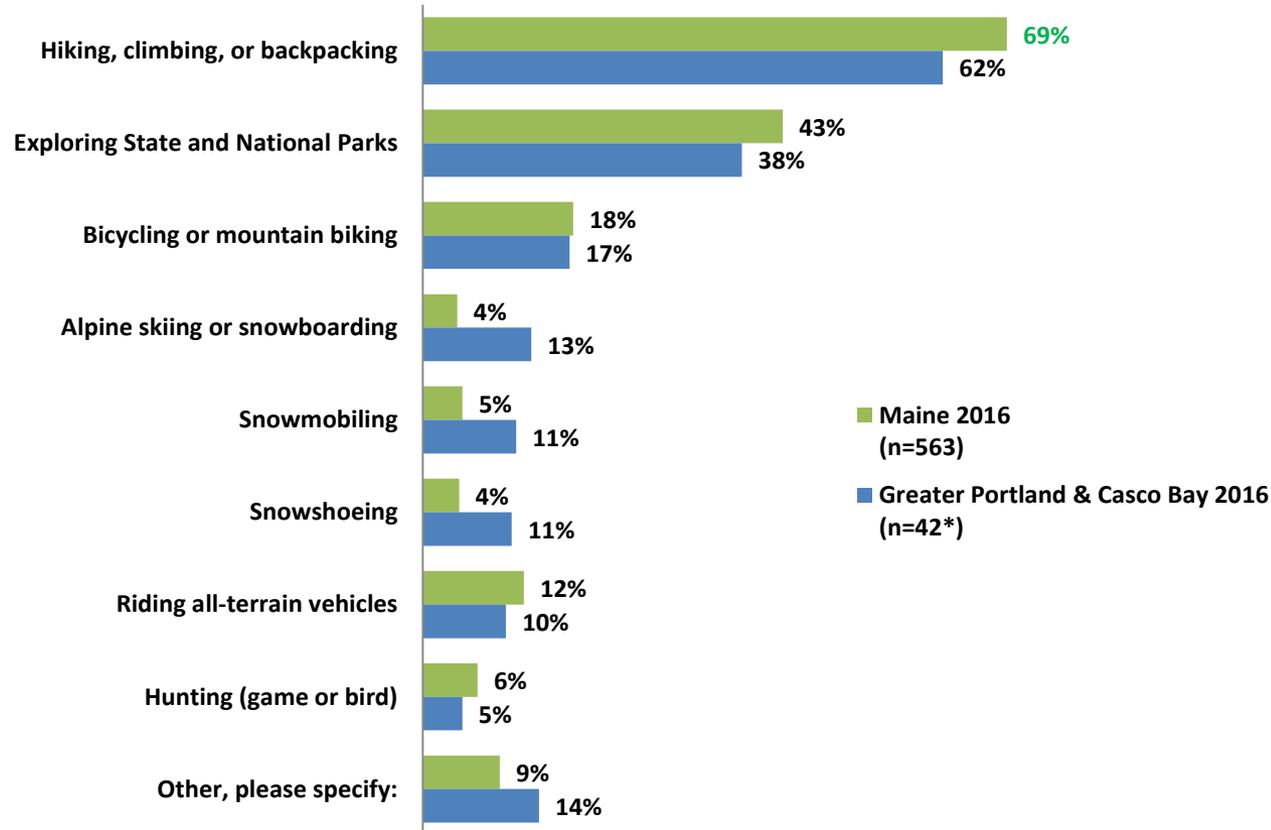
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

**Please note small sample size. Use caution when interpreting results.*

Three in five day visitors to the Greater Portland & Casco Bay region 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 their Maine trip



Q20. 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.

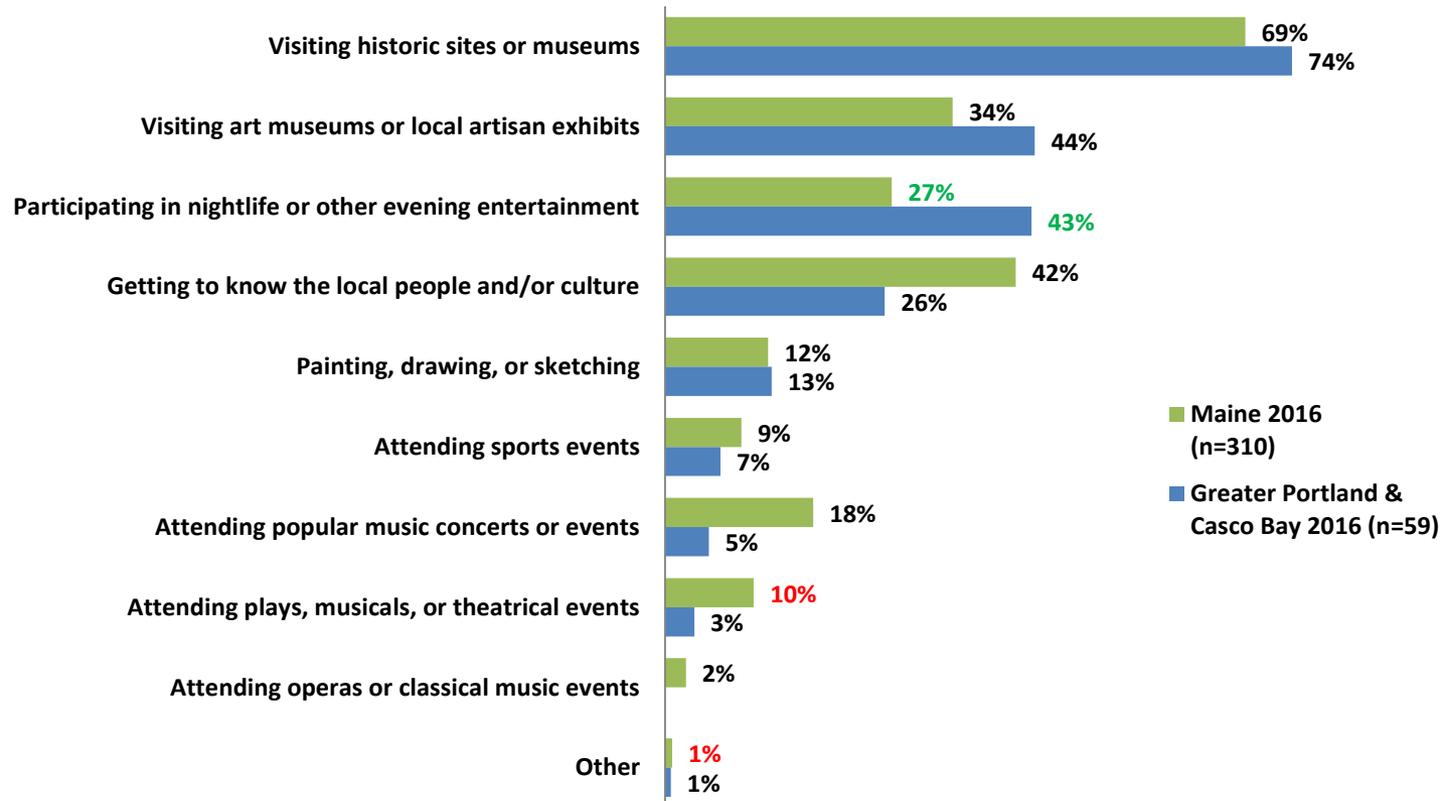
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size. Use caution when interpreting results.

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 their Maine trip



Q20. 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.

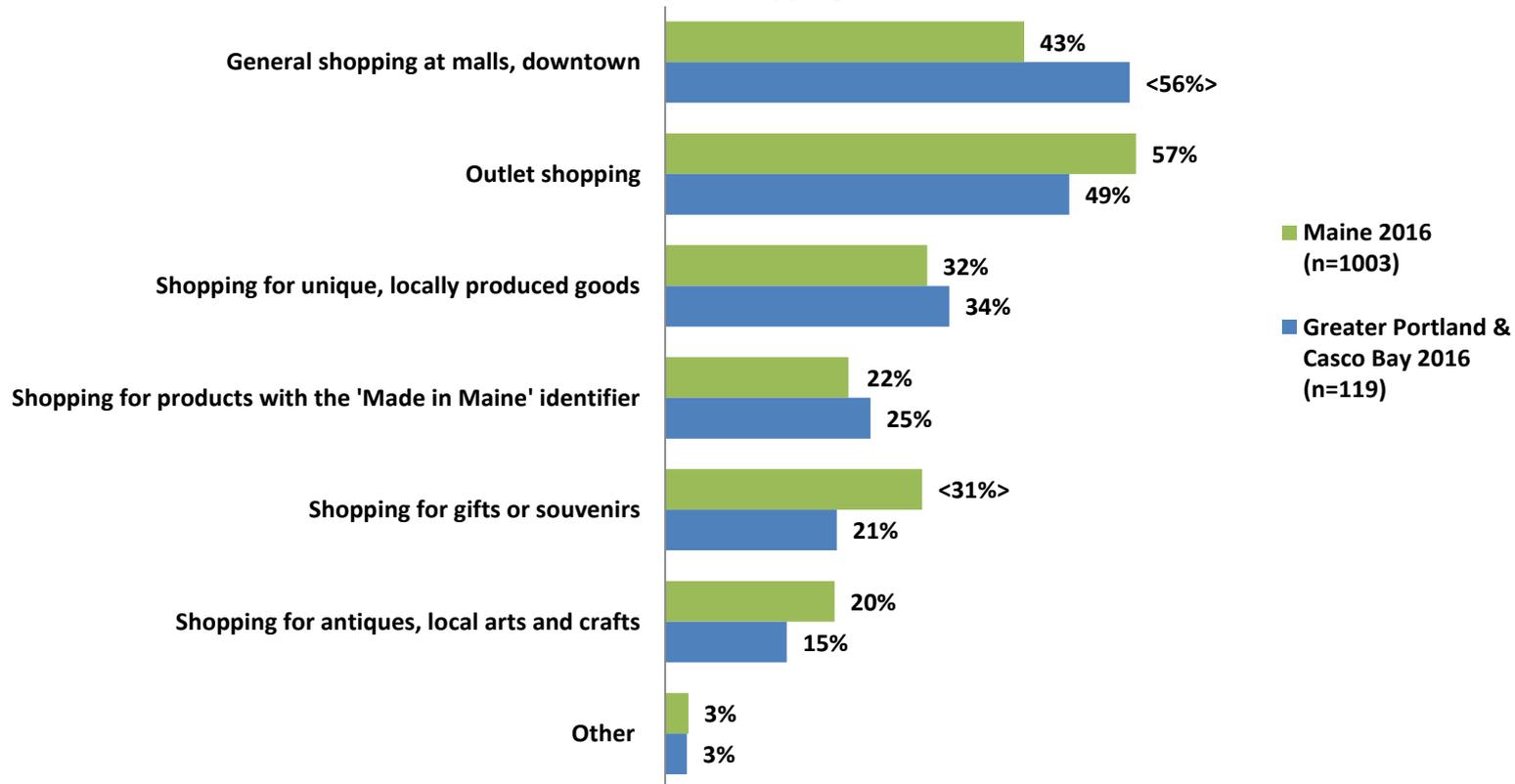
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Greater Portland & Casco Bay day visitors interested in shopping are most likely to *shop at malls/downtown* 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/souvenirs* and more likely to do some *general shopping at malls or downtown*.

Shopping Activities

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

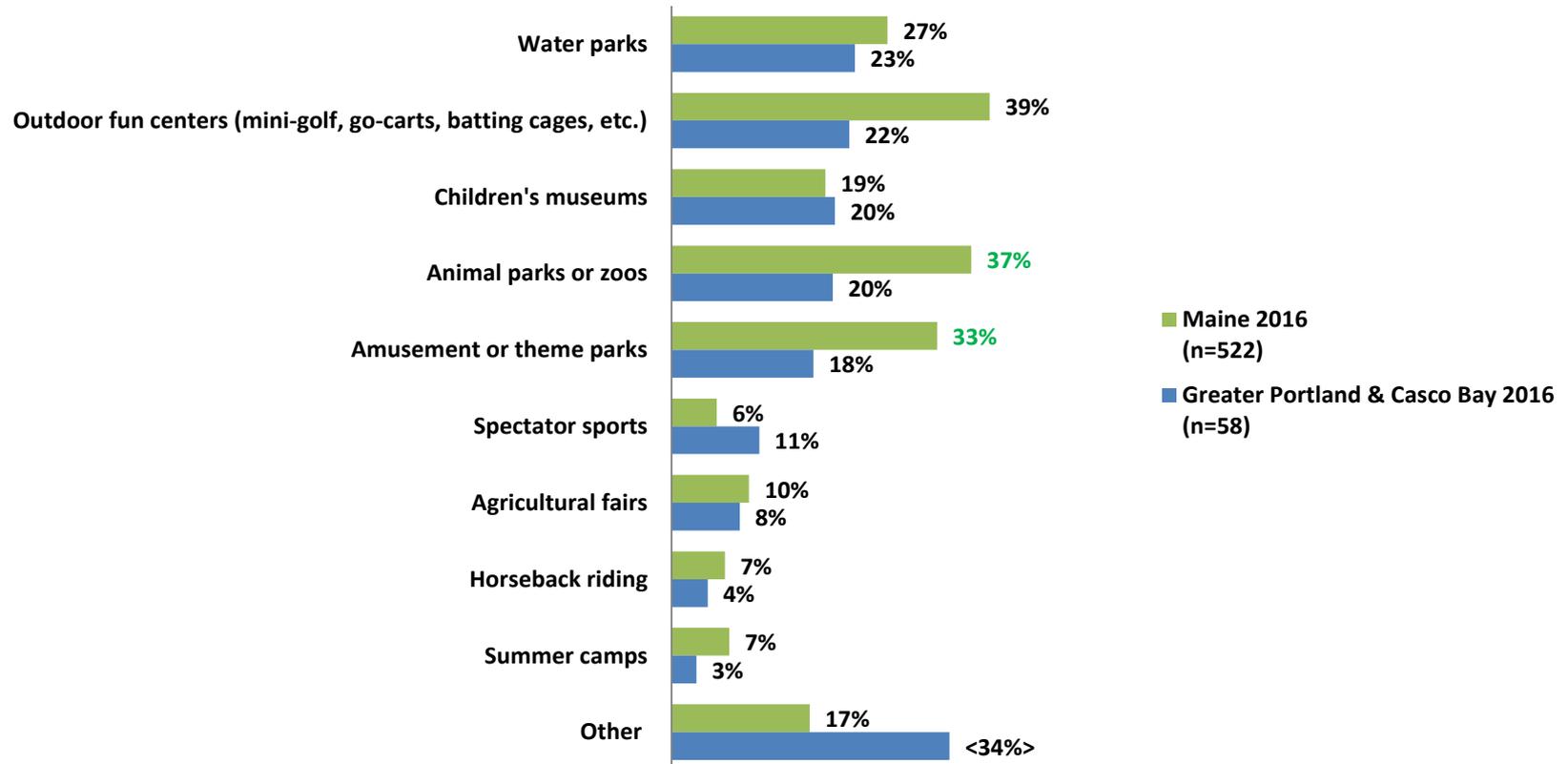
< > indicates a significant difference between subgroups at the 95% confidence level.

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.

Family Fun/Children's Activities

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



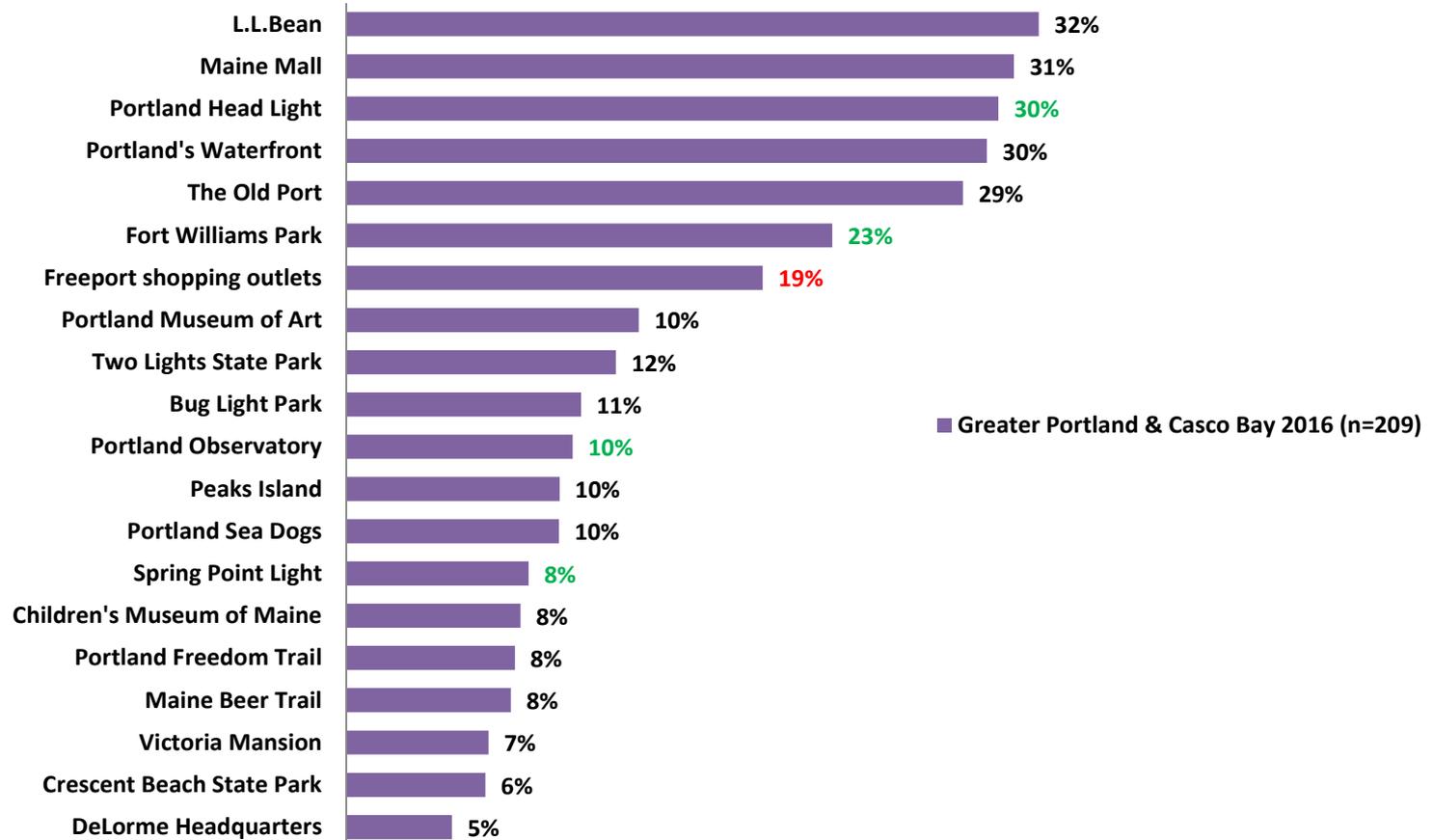
Q20. In which of the following activities did you participate during this trip? Please check all that apply.

< > 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.

L.L.Bean and the Maine Mall are among the top five most visited attractions among day visitors to the Greater Portland region.

Top Attractions/Locations Visited*



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

Q24: 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.

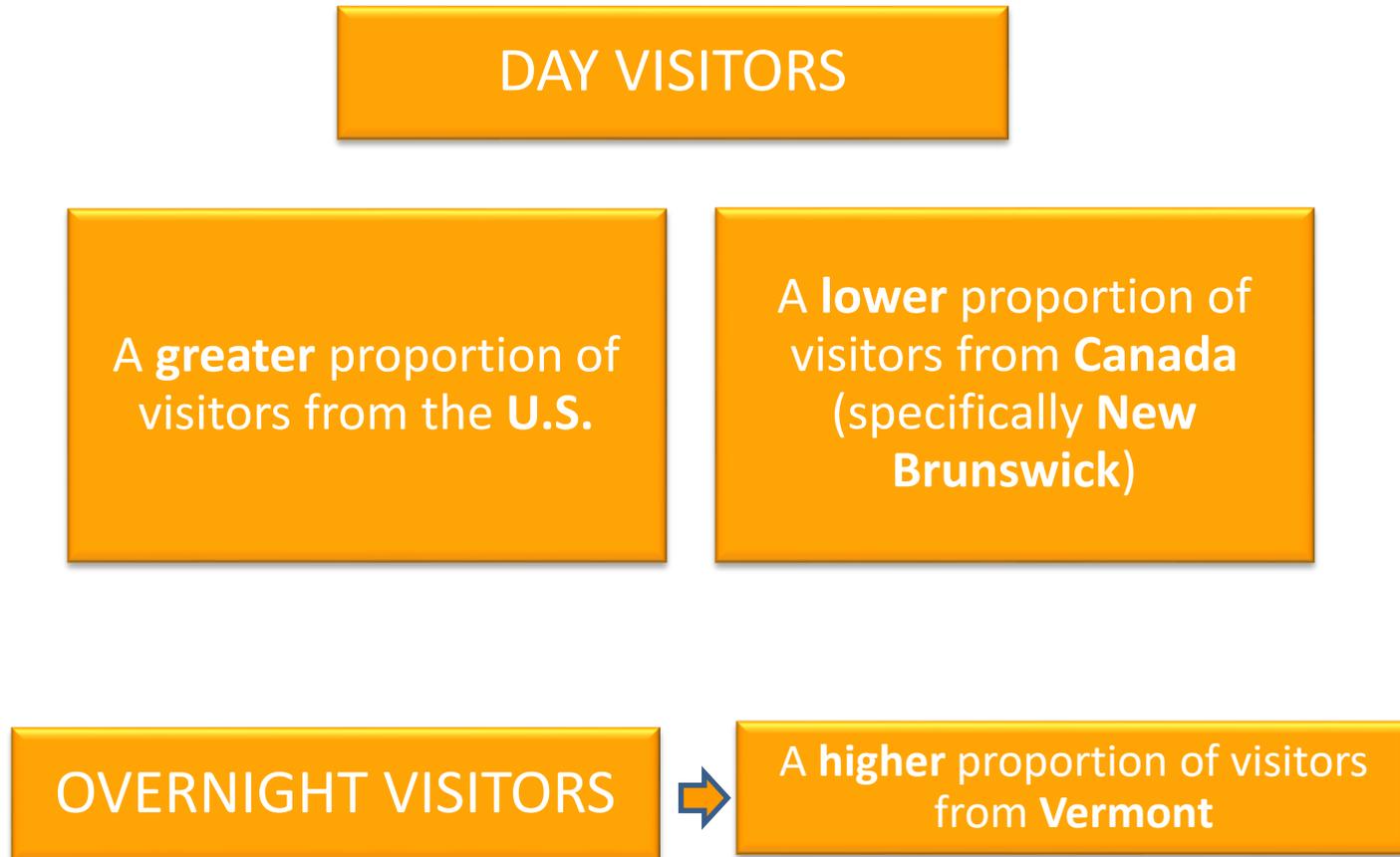
Comparison of Greater Portland & Casco Bay Visitors to Maine Visitors

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:
 - Visitor demographics,
 - Visitor origin,
 - Areas of interest, and
 - The activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the many shopping and dining opportunities and a more “urban” experience available in the Greater Portland region.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the entire State, Greater Portland/Casco Bay region visitors differ in the following ways:



Visitor Demographics and Travel Party Composition

OVERNIGHT VISITORS



Trend older

**More likely to be repeat
visitors**

**Less likely to be employed
full-time**

**Less likely to travel with
kids**

DAY VISITORS



**Higher annual household
incomes**

**More likely to have a
college degree**

Travel in smaller parties

Trip Interest Areas

OVERNIGHT AND DAY VISITORS



Less likely to want to pursue **water activities**

Trip Interest Areas

OVERNIGHT VISITORS

More likely to want to pursue:
Food/beverage/culinary
activities

Less likely to want to pursue:
Family fun/children's activities

Trip Interest Areas

DAY VISITORS

More likely to want to pursue:
History or culture activities

Less likely to want to pursue:
Active outdoor activities

Trip Interests and Importance (Travel Driver Index)

OVERNIGHT AND DAY VISITORS

More likely to place
importance on
**food/beverage/culinary
activities**

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

DAY VISITORS

More likely to place importance
on **history and culture**
Less likely to place importance
on **active outdoor** activities

Trip Activities

**OVERNIGHT AND DAY
VISITORS**

DAY VISITORS

**More likely to be:
Visiting local brew pubs or
craft breweries
Shopping at malls or
downtown**

**Less likely to be shopping
for gifts or souvenirs**

OVERNIGHT VISITORS

Less likely to be:

Enjoying the **mountain views**

Visiting **Farmer's Markets**

Enjoying **local food** at fairs/festivals

Outdoor **swimming**

Camping

Getting to know the **local people and/or culture**



Digital **Research** Group
DRI | CRITICAL **INSIGHTS** | dpa

Davidson-Peterson Associates
172 Commercial Street
Portland, ME 04101
207.985.7660
www.digitalresearch.com