Maine Office of Tourism

Visitor Tracking Research

2018 Calendar Year Annual Report

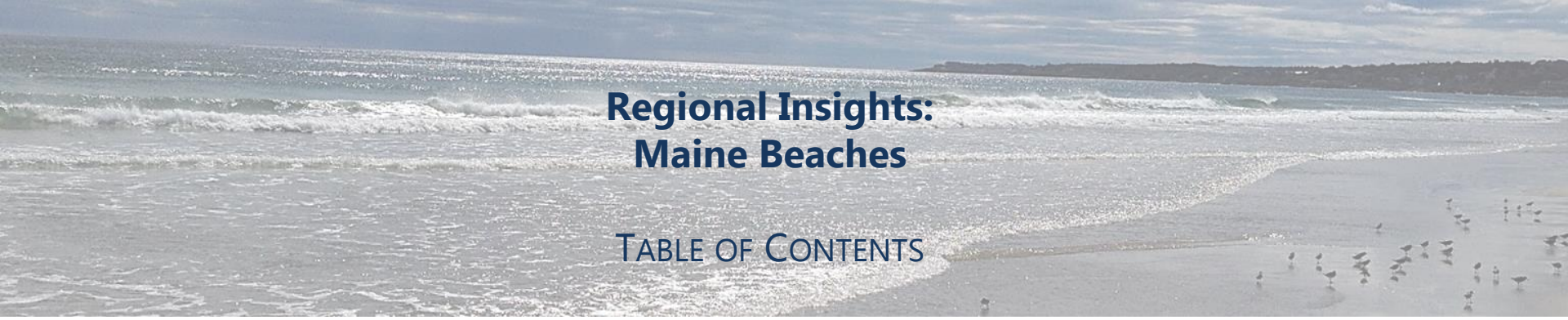
Regional Insights:

Maine Beaches

Prepared by

dpa
providing direction
in travel & tourism
A Division of DRI

May 2019



Regional Insights: Maine Beaches

Table of Contents

Introduction 3

Visitors to the Maine Beaches: How They Are Unique 4

Visitation and Economic Impact Summary 13

Overnight Visitors 15

- Profile 16
- Trip Experience 21

Day Visitors 35

- Profile 36
- Trip Experience 41

Research Objectives and Methodology 54

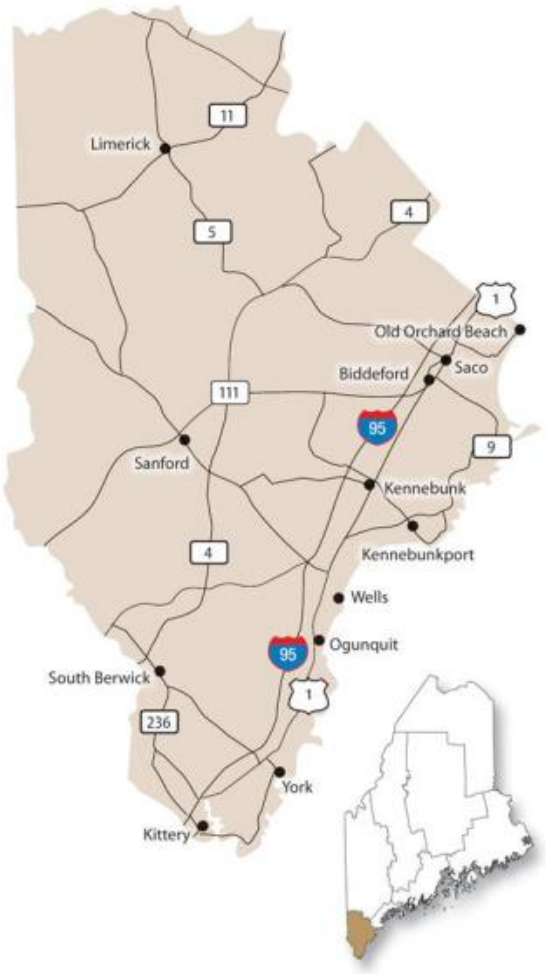
Research Objectives and Methodology

- The following report provides a profile of visitors and their trips to the **Maine Beaches** tourism region during 2018, from a survey of:
  - 687 overnight visitors, and
  - 613 day visitors.

- Throughout this report, data for the **Maine Beaches** tourism region will be presented alongside data for the state of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by < > around the larger figure.

  (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 2017 and 2018 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.



Visitors to the Maine Beaches: How They Are Unique

Comparisons: Region vs. State

- Visitors to the Maine Beaches tourism region and visitors to the state of Maine as a whole in 2018 differed in a number of areas. These variations can be seen in:
  - ✓ Visitor demographics,
  - ✓ Visitor origin,
  - ✓ Areas of interest, and
  - ✓ The activities they participated in while visiting.

- Overall, these differences can be largely attributed to the proximity of the Maine Beaches region to other states in New England, and to the many shopping and beach activities available in the region.

- Highlights of these differences are shown on the following pages.

Visitor Origin and Demographics

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight Visitors

More likely to be from New England, especially Massachusetts.

Less likely to be living in Maine.

Less likely to be from The Mid-Atlantic states, notably New York and Pennsylvania.

Day Visitors

More likely to be Massachusetts or New Hampshire residents.

Less likely to be living in Maine.

More affluent, with **higher incomes**.

Trip Interest Areas

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight Visitors

More likely to be interested in:

- Food and beverages,
- Shopping, and
- Water activities.

Day Visitors

More likely to be interested in:

- Food and beverages, and
- Water activities.

Overnight and Day Visitors

Less likely to be interested in:

- Active outdoor (non-aquatic) activities, and
- History and culture.

Trip Interests and Importance (Travel Driver Index)

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight and Day Visitors

More likely to take trips driven by**:**

- Water activities.

Less likely to take trips driven by**:**

- Active outdoor (non-aquatic) activities, and
- History and culture.

Trip Activities

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight Visitors

More likely to visit amusement parks, **less** likely to visit summer camps.

More likely to go to the beach and swim in pools.

Day Visitors

Less likely to visit summer camps or agricultural fairs.

More likely to go to the beach.

Trip Activities

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight Visitors

More likely to enjoy local seafood.

Less likely to:

- Go to brew pubs,
- Visit farmer's markets, and
- Eat farm-to-table cuisine.

Day Visitors

More likely to enjoy local seafood.

Less likely to enjoy unique Maine foods and beverages.

Trip Activities

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight Visitors

More likely to shop at outlets.

More likely to enjoy nightlife or evening entertainment.

Day Visitors

More likely to shop at outlets.

Less likely to shop in downtown areas or in malls.

Trip Activities

Visitors to the Maine Beaches region, compared to visitors statewide, were…

Overnight Visitors

More likely to enjoy ocean/coastal views and go for a pleasure drive.

Less likely to:

- Enjoy mountain views,
- Watch birds or wildlife,
- Go on a nature cruise/tour,
- Visit state/national parks,
- Ride all-terrain vehicles,
- Hunt,
- Fish,
- Motor boat, and
- Go white water rafting.

Day Visitors

More likely to enjoy ocean/ coastal views.

Less likely to:

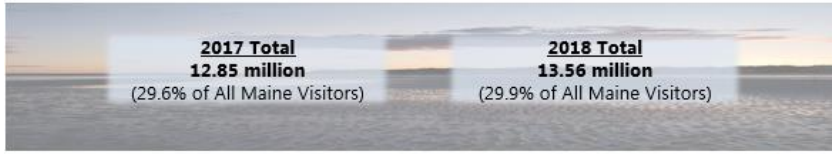
- Enjoy mountain views,
- Watch birds or wildlife,
- View fall colors,
- Go fishing or hunting,
- Go canoeing or kayaking, and
- Snowmobile.

Visitation and Economic Impact Summary

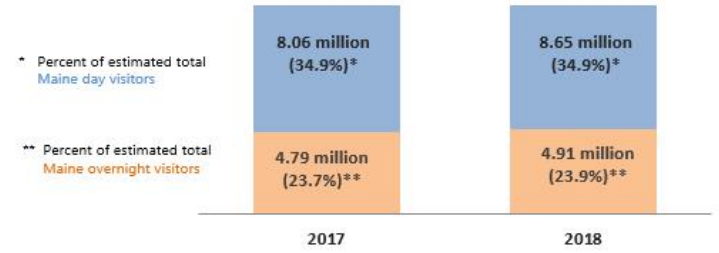
Visitation and Economic Impact Summary: The Maine Beaches

2018 Regional Tourism Impact Estimates

An estimated 13.6 million travelers visited the Maine Beaches region in 2018 ~ a 5.5% increase over 2017.



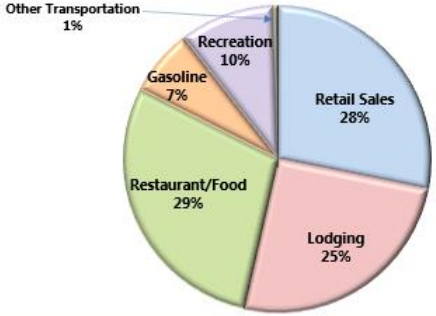
Number of Visitors to the Maine Beaches Region



The visitation estimates shown above include all visitors on tourism-related trips. Tourism related trips include: all leisure trips, trips that are a general visit to see friends or relatives, a wedding, a holiday visit, and business trips that are for a convention/conference/trade show or training/professional development.

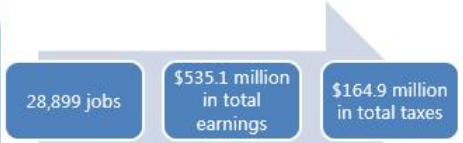
2018 Regional Tourism Impact Estimates

In 2018, Maine Beaches visitors spent $1.70 billion ~ up 2.6% from 2017.



The $1.70 billion spent by visitors to the Maine Beaches supported a total of...

Economic impact begins when a visitor spends money in a region. But the benefits to a local economy go well beyond the impact of this initial spending. These "direct economic impact" dollars continue to circulate through the economy, as (for example) innkeepers pay wages, restauranteurs purchase raw ingredients, and so on. These additional rounds of spending are called "indirect economic impact." Total economic impact is the sum of the travelers' initial (direct) spending and the subsequent (indirect) spending by residents of the area. The jobs created, income earned, and tax dollars received are based on the total economic impact.



These economic impact estimates are based on all overnight visitors and out-of-state day visitors on tourism-related trips (as defined on the opposite page). Economic impact is estimated using DPA's visitor expenditure estimates and the RIMS II economic impact model.

OVERNIGHT VISITORS

Profile of Overnight Visitors

Overnight Visitor Demographics

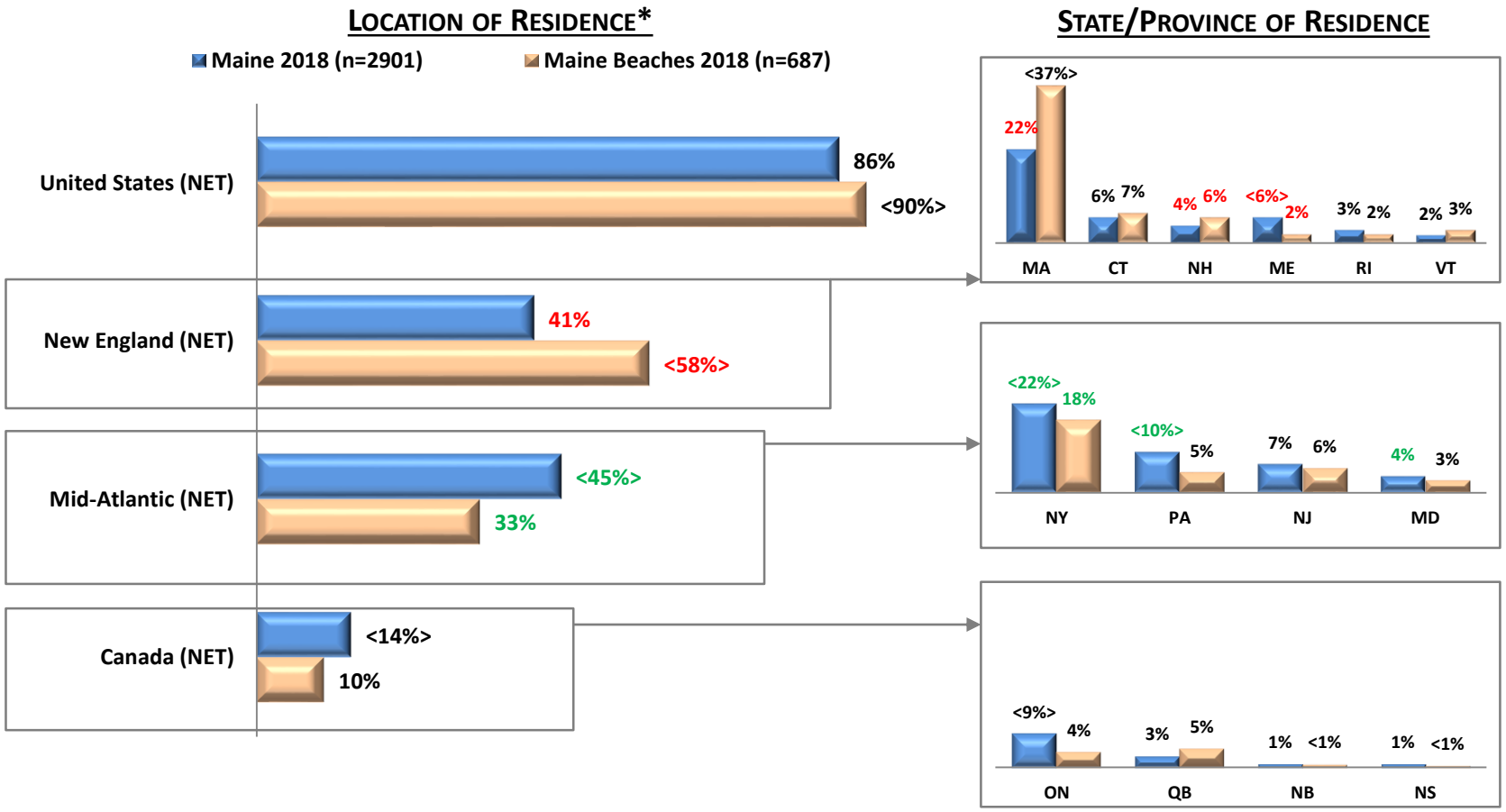
- Overall, the demographic profile of overnight visitors to the Maine Beaches region was similar to that of statewide visitors. The average surveyed traveler to the region was 40 years old, their average income was about $83,000, and about half were married.
- At the same time, surveyed overnight visitors to the Beaches region were more likely to be female, less likely to have a college degree, and less likely to be employed full-time.

	Maine 2018 (n=2901)	**Maine Beaches 2018** (n=687)
Age:		
< 35	46%	43%
35 - 44	23%	22%
45 - 54	14%	14%
55 +	17%	<21%>
Mean	39.0	<40.2>
Income:		
< $50,000	27%	29%
$50,000 - $99,999	43%	42%
$100,000 +	30%	29%
Mean	$86,400	$82,800
Female	66%	<76%>
College degree or higher	<65%>	60%
Married	47%	46%
Employed full-time	<62%>	54%

<> indicates a significant difference between this region and the State 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 out of ten overnight visitors to the Beaches region came from the U.S., including six out of ten who were from New England and three out of ten who were from the Mid-Atlantic.

- By a wide margin, Massachusetts provided the largest share of visitors to the region.
- As with statewide visitors, the Beaches region saw relatively fewer visitors from New England in 2018 and a corresponding increase from the Mid-Atlantic states.



**Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

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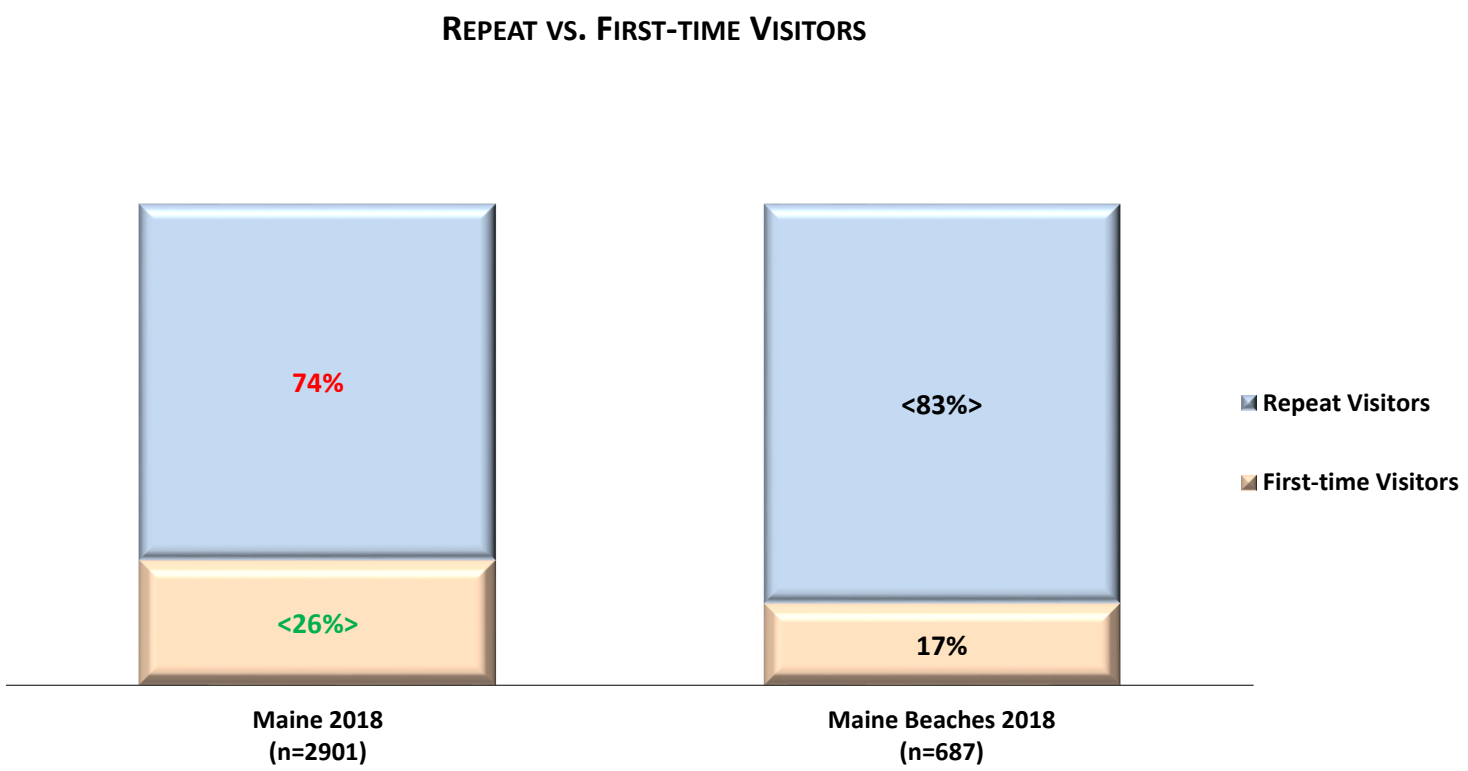
Almost one out of five overnight visitors to the Beaches region in 2018 had never been to Maine before.

- Compared to statewide visitors, the region was more likely to attract repeat visitors.



Q11. Was this your first visit in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.
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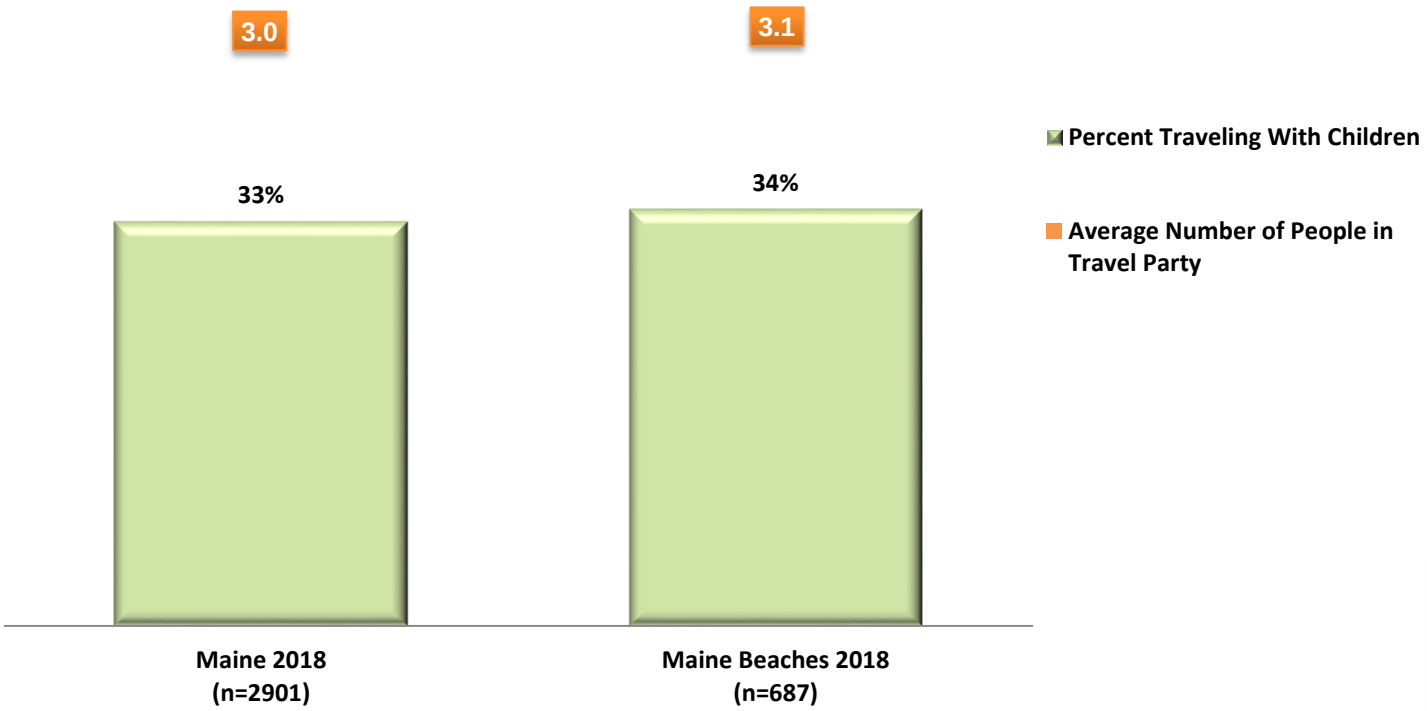
The average overnight travel party visiting the Beaches had 3 people, and one-third of overnight parties included children.

Travel Party Size and Composition



Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q25. How many of these people were: Children?
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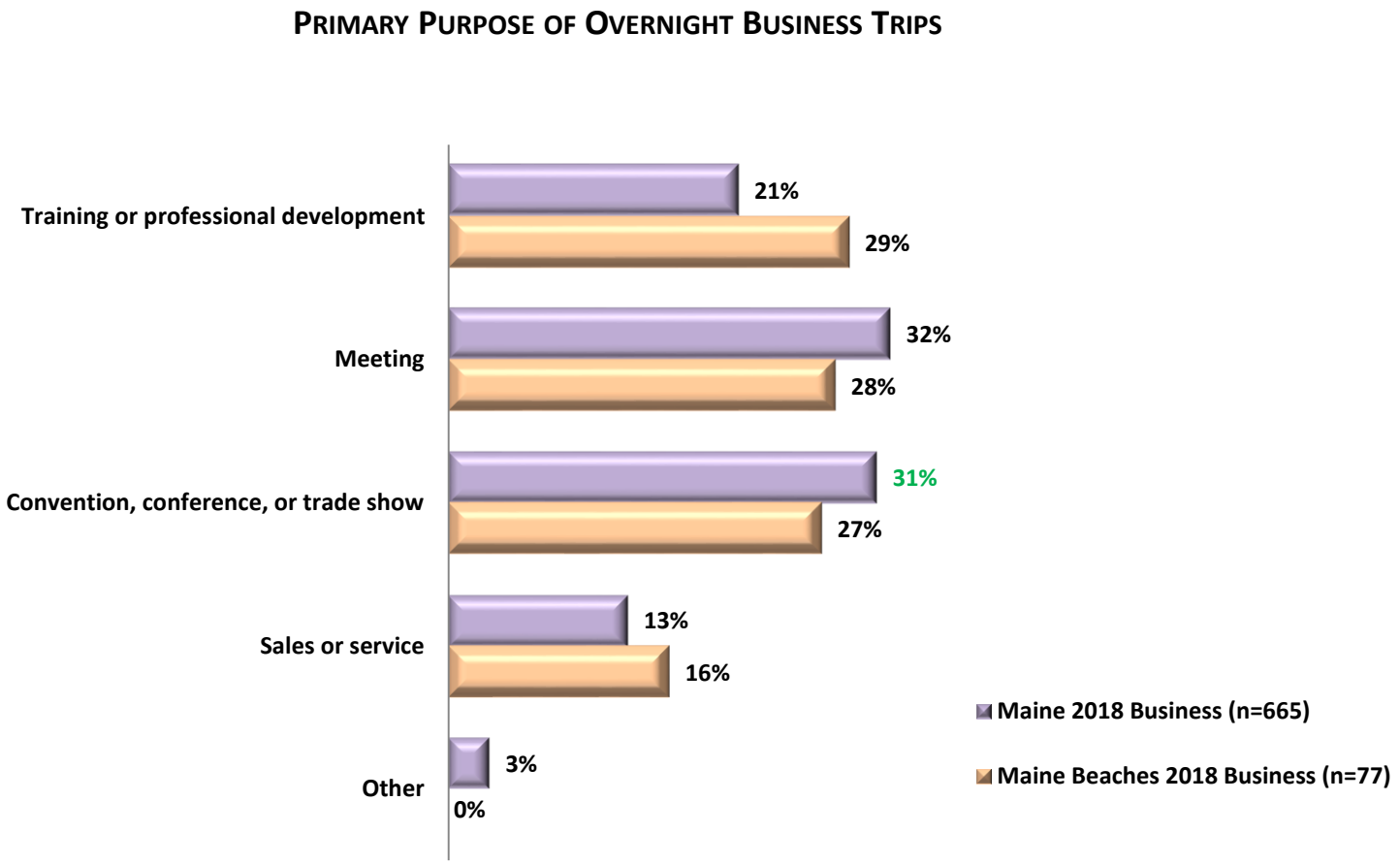
Overnight Visitors: Trip Experience

Overnight business trips to the region were most often devoted to training, meetings, or conference travel.



Q8. What was the primary purpose of your most recent business trip in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.
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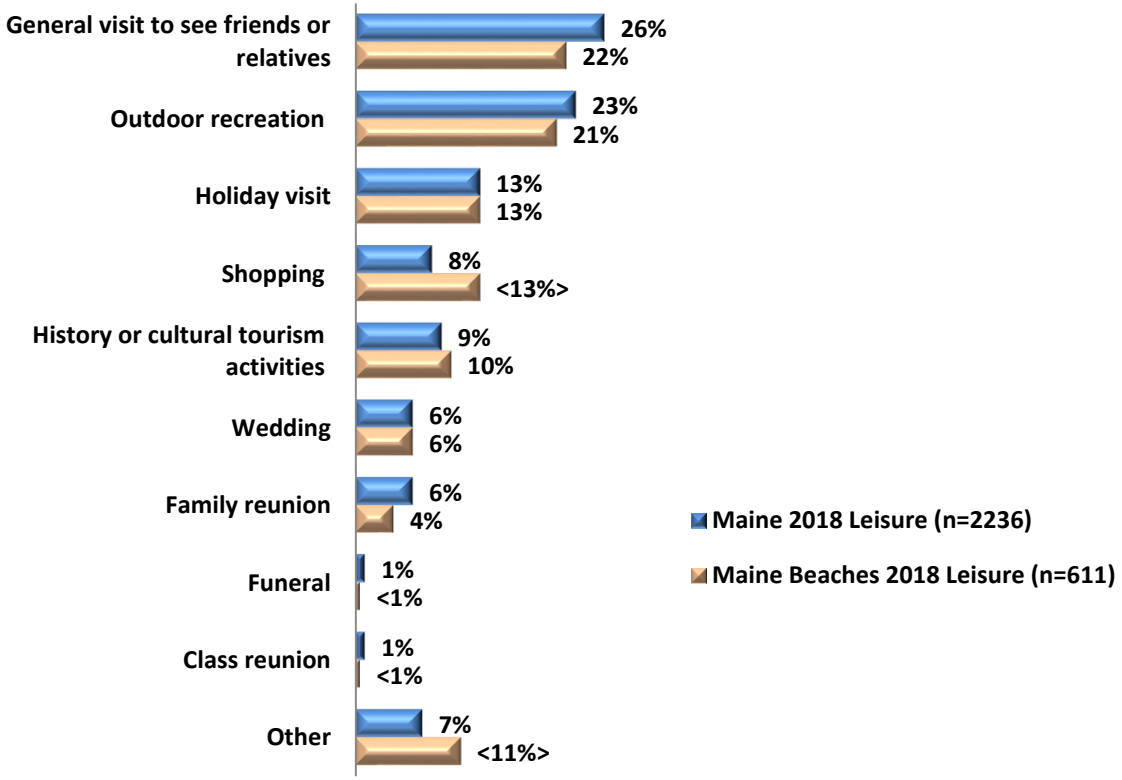
The most common purposes of overnight leisure trips to the Beaches region were visiting friends or family and outdoor recreation.

- Compared to overnight travelers statewide, the region had a higher proportion traveling primarily to shop.

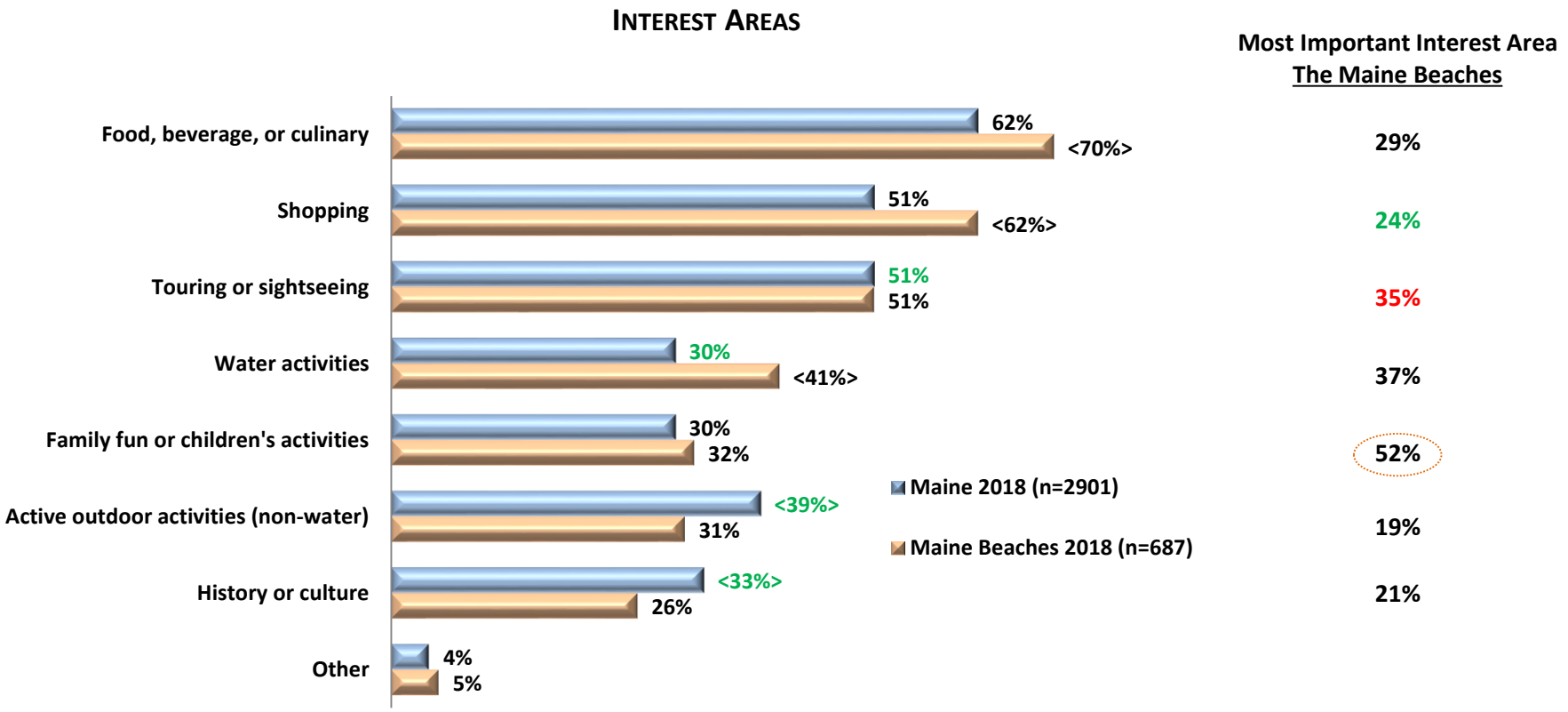
Primary Purpose of Overnight Leisure Trips



Q9. What was the primary purpose of your most recent leisure trip in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.

Culinary interests, shopping, and sightseeing were the *most common* interest areas for visitors to the region. Family fun activities were most likely to be the *most important* in decisions to visit Maine.

- Visitors to the Beaches region were more likely than visitors to the state overall to be interested in food & beverages, shopping, and water activities. On the other hand, Beaches visitors were less likely to be interested in land-based active outdoor activities and history or culture.



Q35. Which of the following ***interest areas*** did you want to pursue during this trip to Maine? *Please check all that apply*.
Q36. 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.
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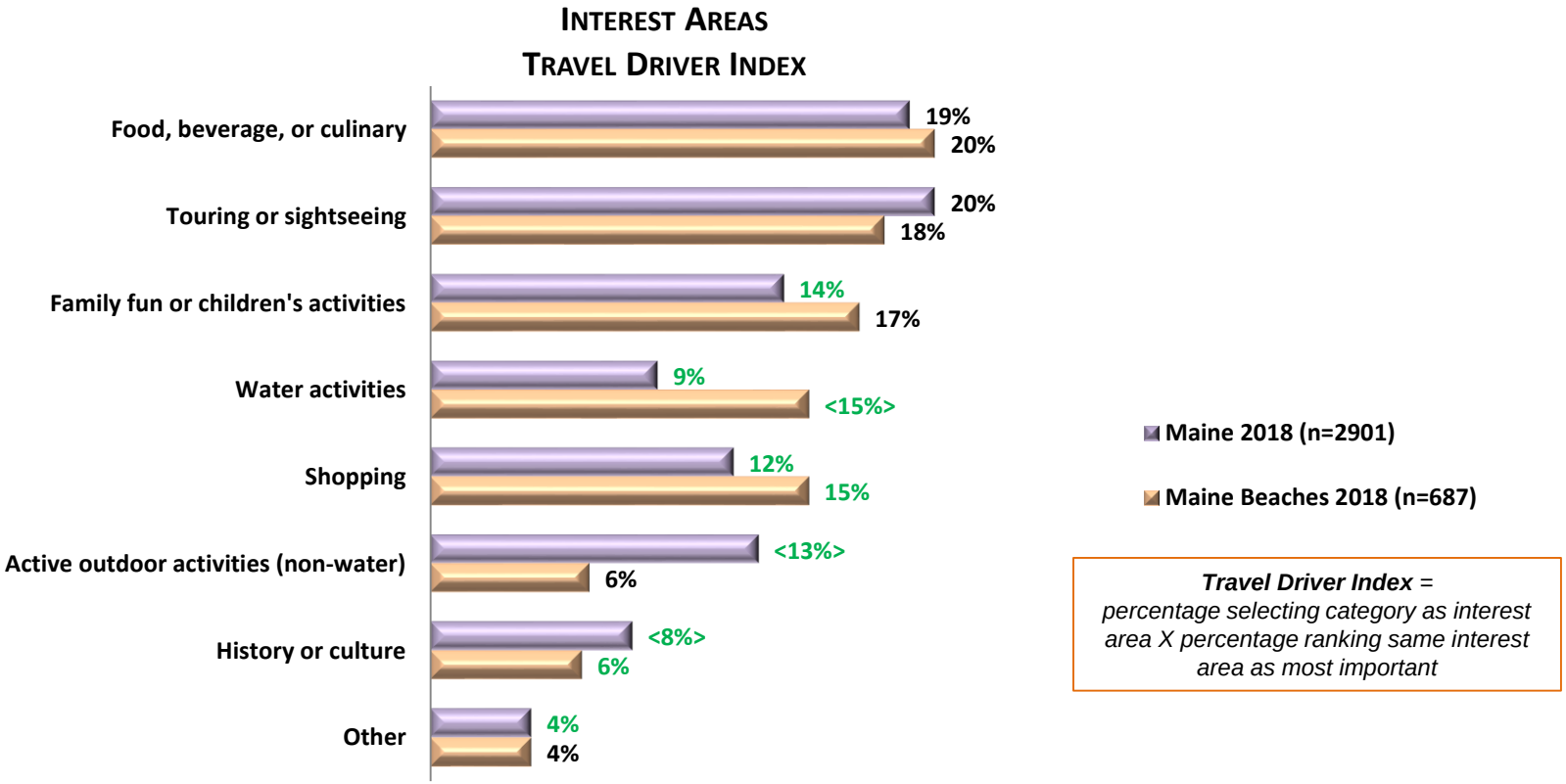
When looking at both interest and importance, culinary activities, sightseeing, family fun, water activities, and shopping were the top drivers of overnight trips to the Beaches region.

- Predictably, water activities were stronger drivers for regional travel vs. statewide travel, whereas non-water activities and cultural pursuits were stronger drivers for the state overall than for the region.



Q35. Which of the following ***interest areas*** did you want to pursue during this trip to Maine? *Please check all that apply*.
Q36. 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.
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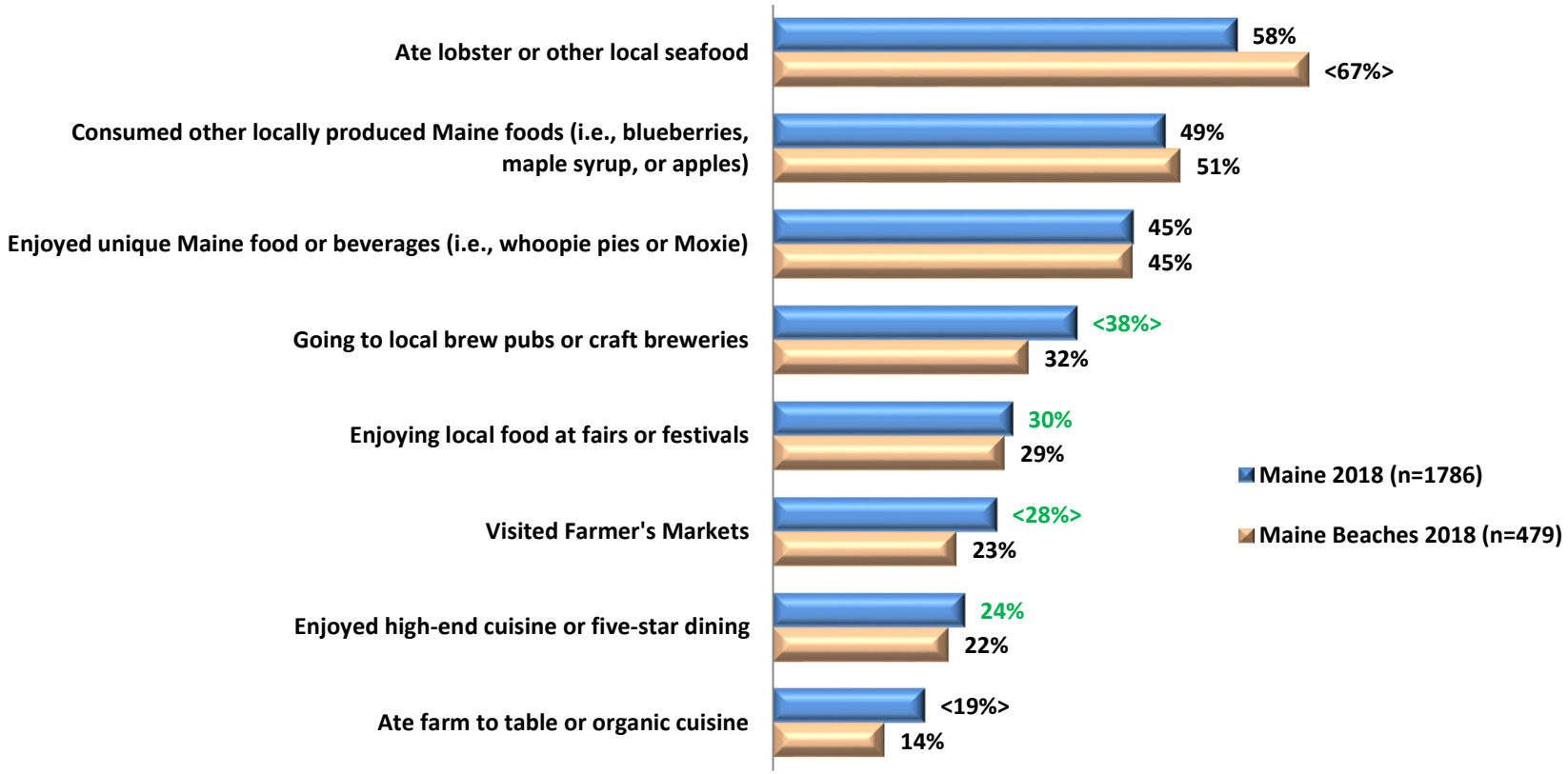
The most common culinary activity in the region and state was eating seafood, followed by eating other locally-produced foods and enjoying foods unique to Maine.

- While eating seafood was more common among the region's visitors than among visitors statewide, going to brew pubs, farmers' markets, and eating farm to table foods were less common.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
<> indicates a significant difference between this region and the State at the 95% confidence level.
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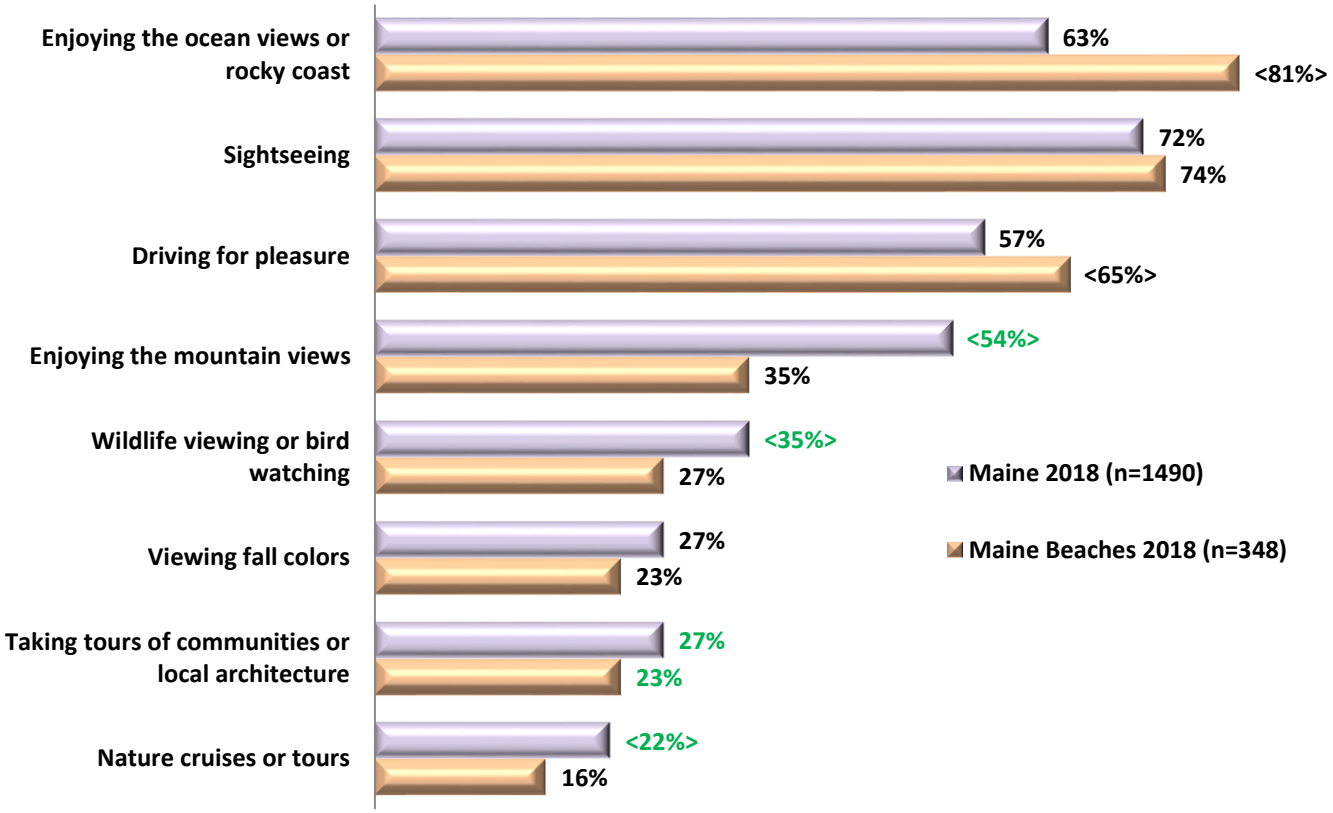
Enjoying the coastal views was the most popular sightseeing activity in the region, followed by sightseeing generally and driving for pleasure.

- As might be expected, visitors to the region were more likely than those to the state overall to enjoy coastal views and go driving for pleasure. At the same time, regional visitors were less likely to see the mountains, view wildlife, and take nature cruises.

TOURING OR SIGHTSEEING ACTIVITIES

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
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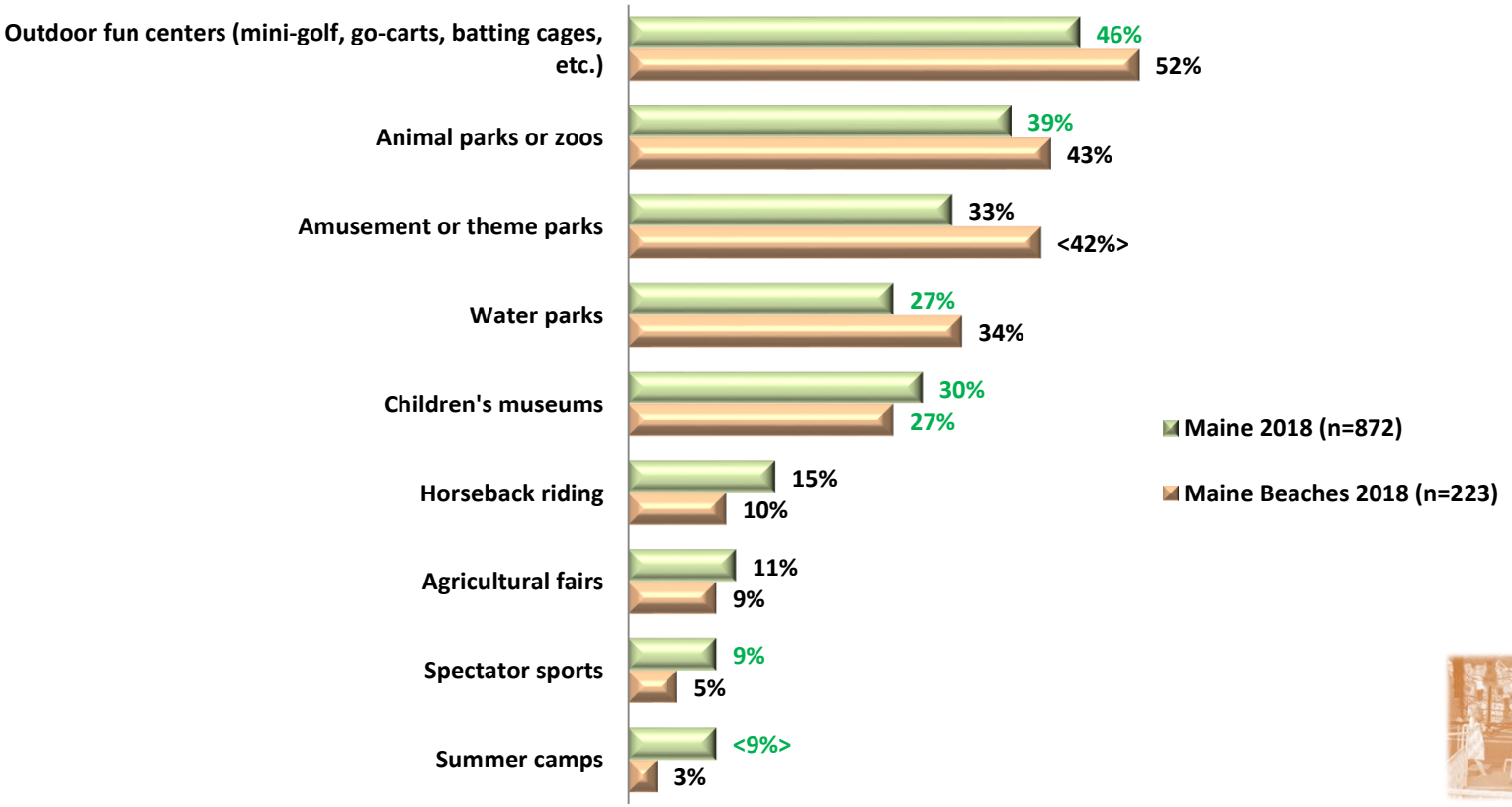
Going to outdoor fun centers was the most popular family-oriented activity in the region for overnight travelers, though animal parks and amusement parks were also relatively popular.

- Going to amusement parks was more common among regional overnight visitors than it was among visitors statewide.

FAMILY FUN/CHILDREN'S ACTIVITIES

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
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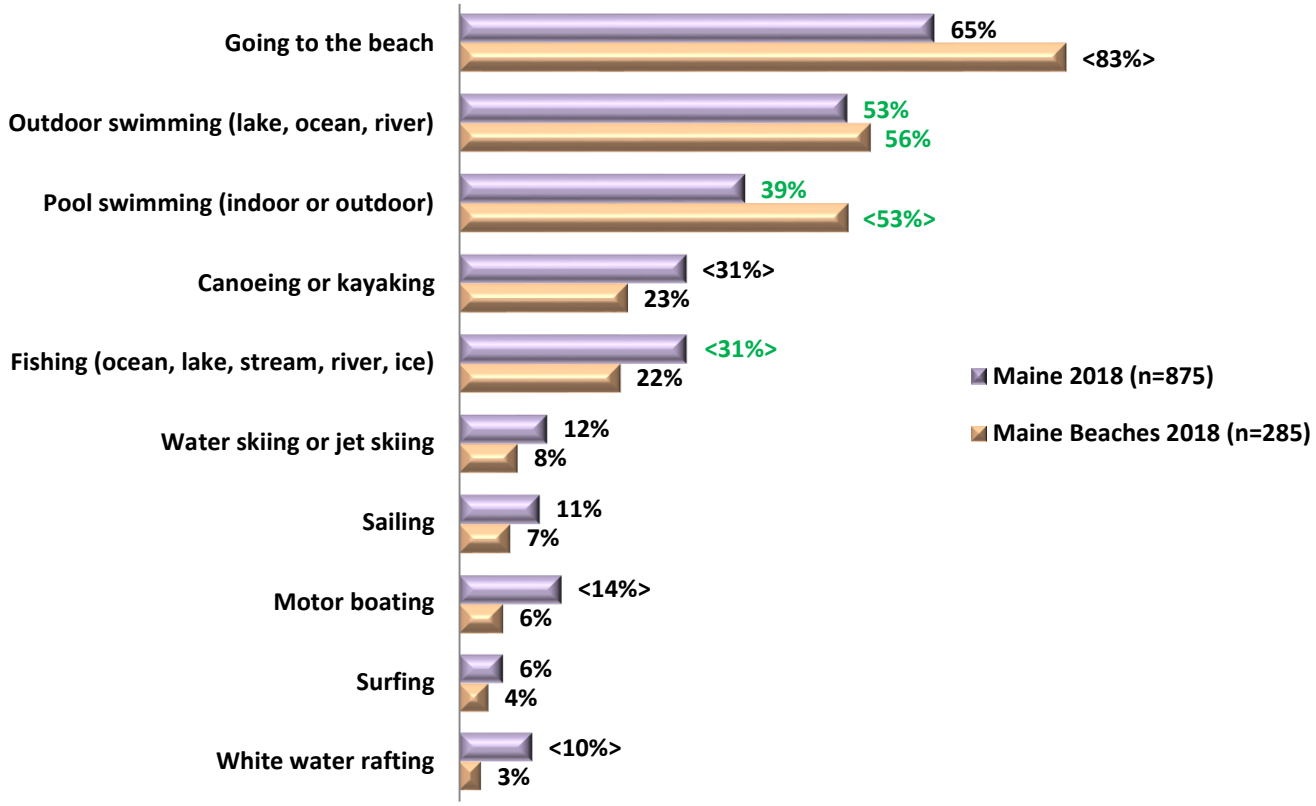
Predictably, going to the beach and all types of swimming were the most common water activities among overnight visitors to the region.

- Going to the beach and pool swimming were more common among the region's overnight visitors than among statewide visitors, while canoeing/kayaking, fishing, motor boating, and white water rafting were less common.

WATER ACTIVITIES

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
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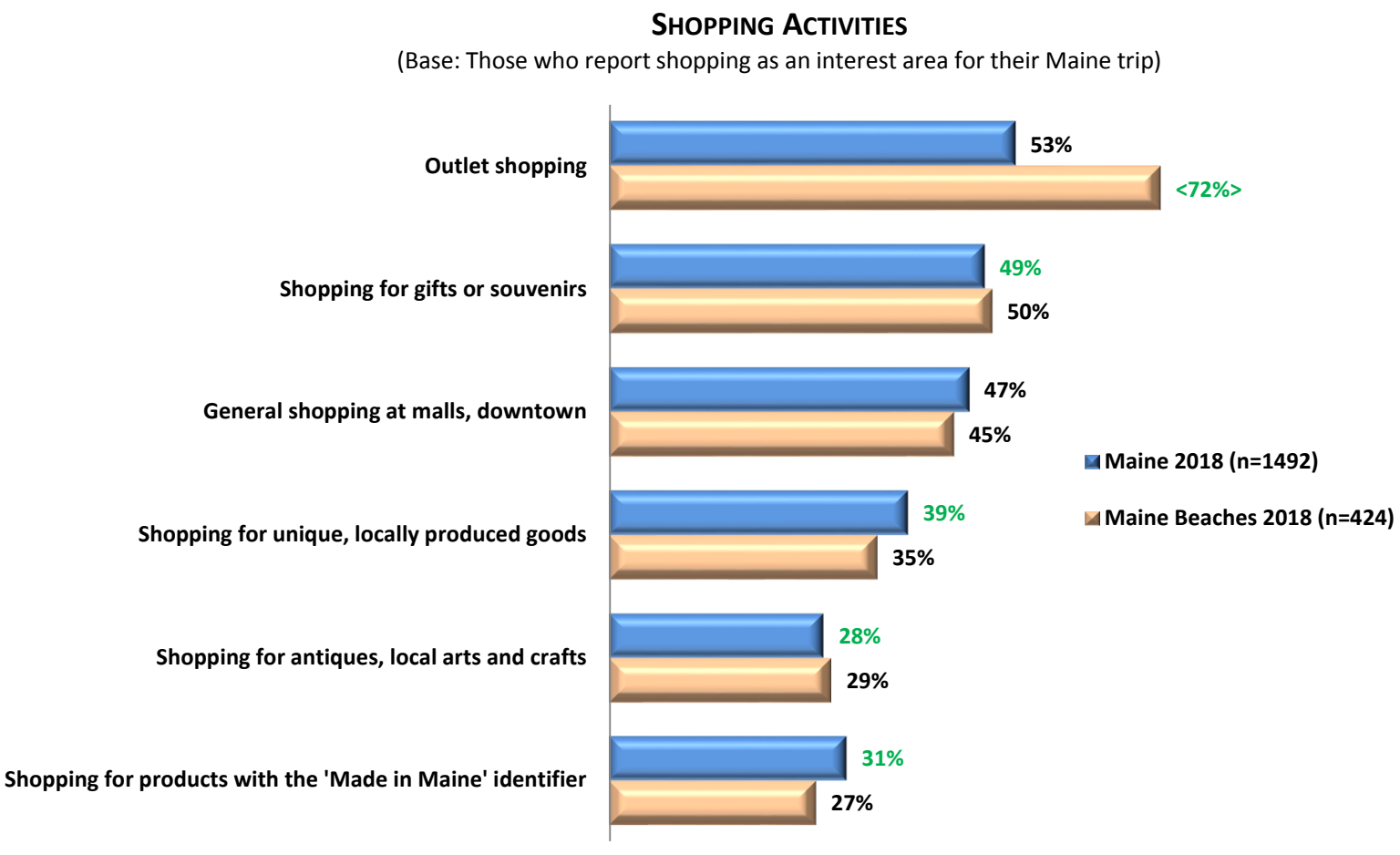
Outlet shopping was the most popular shopping activity in the region, by far, followed by shopping for gifts/souvenirs and shopping at malls or in downtowns.

- Outlet shopping was much more common on overnight trips to the region than across the state generally.



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
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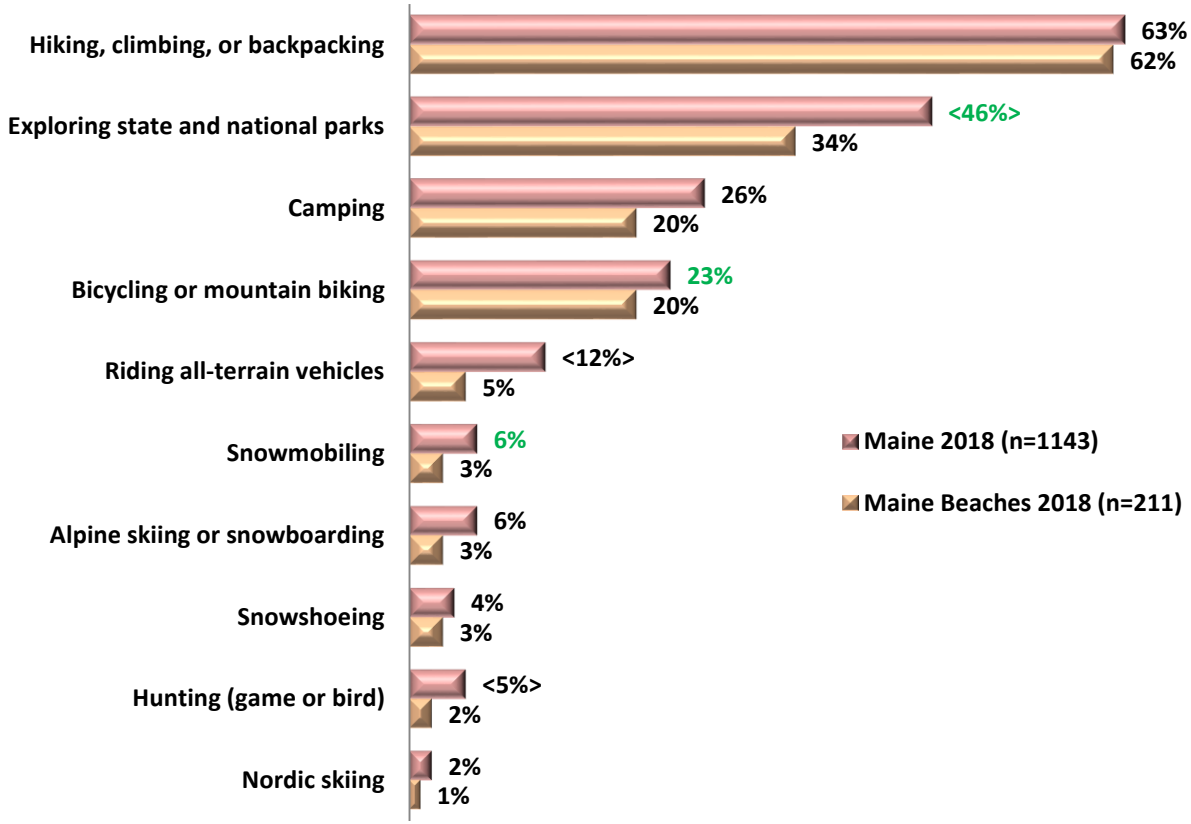
Hiking and related activities were the most common active outdoor pursuits in the region for overnight visitors, followed – distantly – by exploring state and national parks.

- Exploring state or national parks, riding all-terrain vehicles, and hunting were less common among the region's overnight visitors than they were among overnight visitors statewide.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
<> indicates a significant difference between this region and the State at the 95% confidence level.
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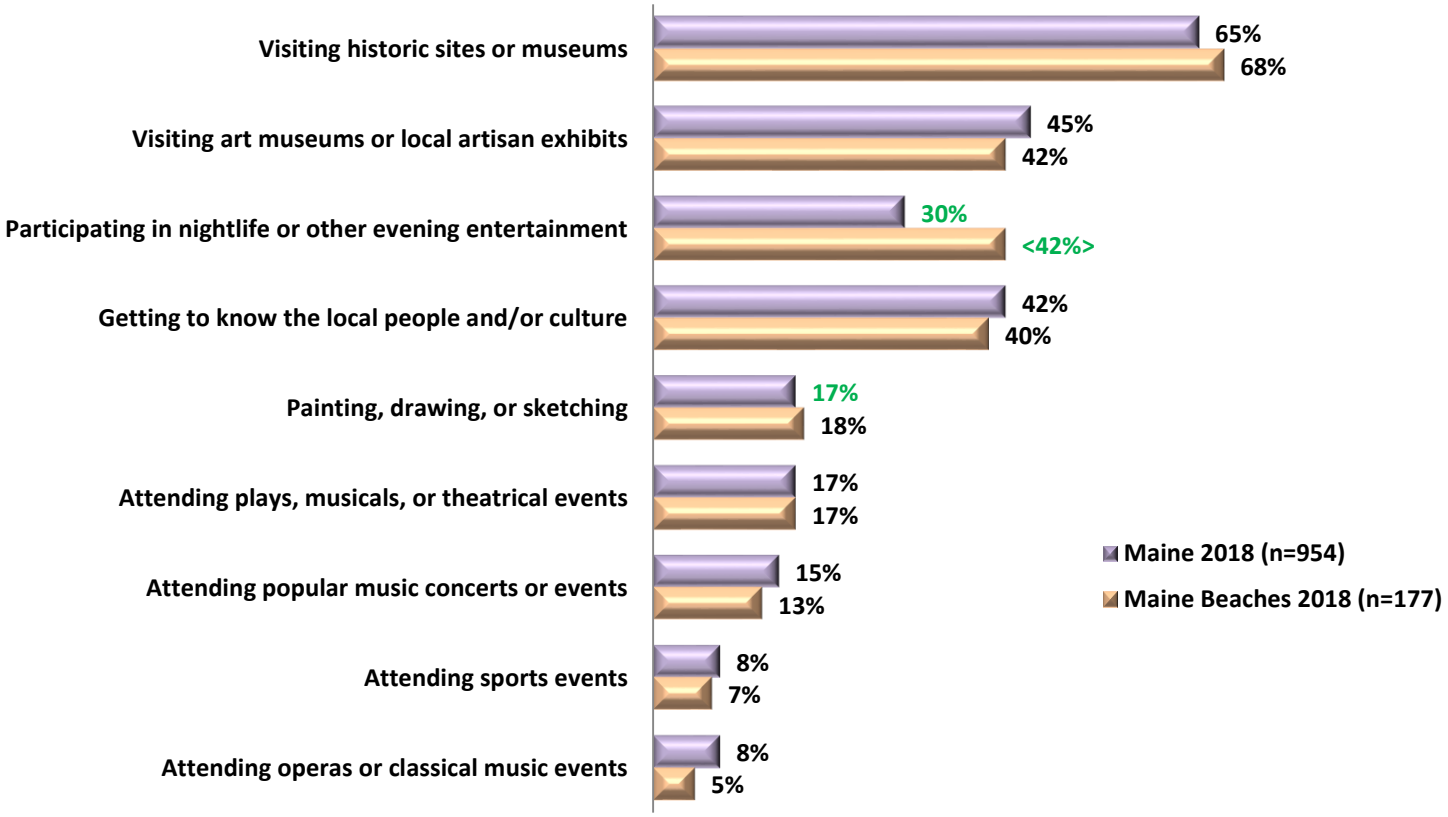
Visiting historic sites or museums was the most common cultural activity among those visiting the region overnight, though many also visited art exhibits, took part in nightlife, or learned about the culture.

- Participation in nightlife was more popular among overnight travelers to the region in 2018 (42%) than it was in 2017 (19%), and was more common among the region's overnight visitors than among those statewide.

History or Culture Activities

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply*.
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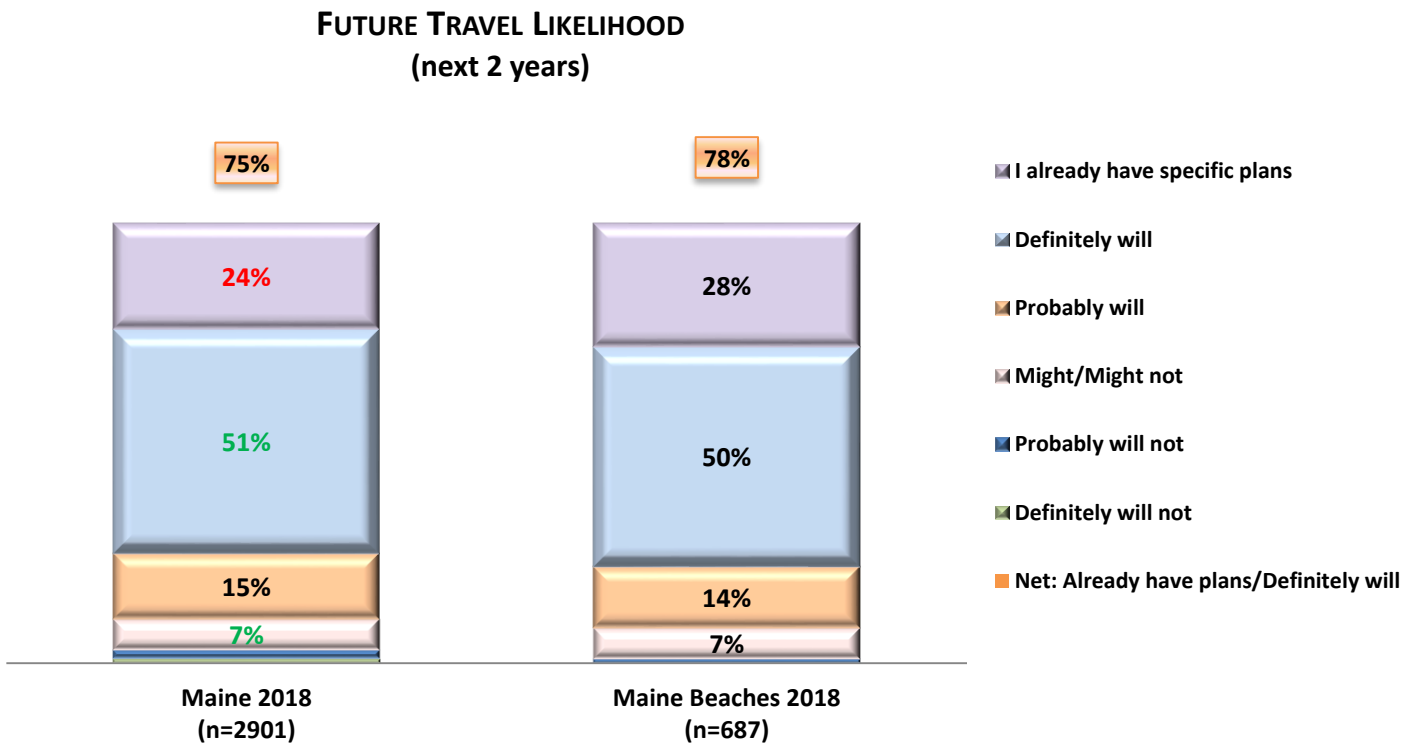
Overnight visitors to the Maine Beaches region went to a variety of local attractions, led by the Kittery Outlets and Old Orchard Beach.

Top destinations		Less popular destinations*	
36%	Kittery Shopping Outlets	13%	Perkins Cove
32%	Old Orchard Beach	12%	Marginal Way
27%	Kittery	12%	York's Wild Kingdom
26%	Ogunquit Beach	11%	Short/Long Sands Beach
24%	York	10%	Biddeford/Saco
24%	Ogunquit	10%	Dock Square, Kennebunkport
24%	Wells Beach	10%	Ferry Beach State Park
23%	Kittery Trading Post	9%	Fun-O-Rama
22%	Old Orchard Beach Pier	9%	Funtown Splashtown USA
19%	Kennebunk Beach	7%	Palace Playland
18%	Wells	6%	Aquaboggan Water Park
16%	Cape Neddick 'Nubble' Light		
15%	The Kennebunks		

** Does not include options selected by fewer than 5% of responding visitors.*

Q32. Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Roughly eight out of ten overnight visitors to the Beaches region either had already made plans or will definitely travel to Maine in the next two years.



Q44. How likely will you be to travel in Maine in the next two years?
<> indicates a significant difference between this region and the State at the 95% confidence level.
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DAY VISITORS

Profile of Day Visitors

Day Visitor Demographics

- The average surveyed day traveler to the Maine Beaches region in 2018 was 44 years old and had an income of almost $90,000.
- Three out of five responding visitors had a college degree; half were married; and half were employed full-time.
- Although surveyed visitors to the state and region were similar in terms of age, education, and employment, visitors to the region had higher incomes, on average.

	Maine 2018 (n=1756)	Maine Beaches 2018 (n=613)
Age:		
< 35	37%	36%
35 - 44	18%	18%
45 - 54	16%	17%
55 +	28%	29%
Mean	43.0	44.1
Income:		
< $50,000	<38%>	25%
$50,000 - $99,999	39%	44%
$100,000 +	22%	<31%>
Mean	$74,100	<$87,100>
Female	78%	81%
College degree or higher	58%	60%
Married	49%	53%
Employed full-time	49%	51%

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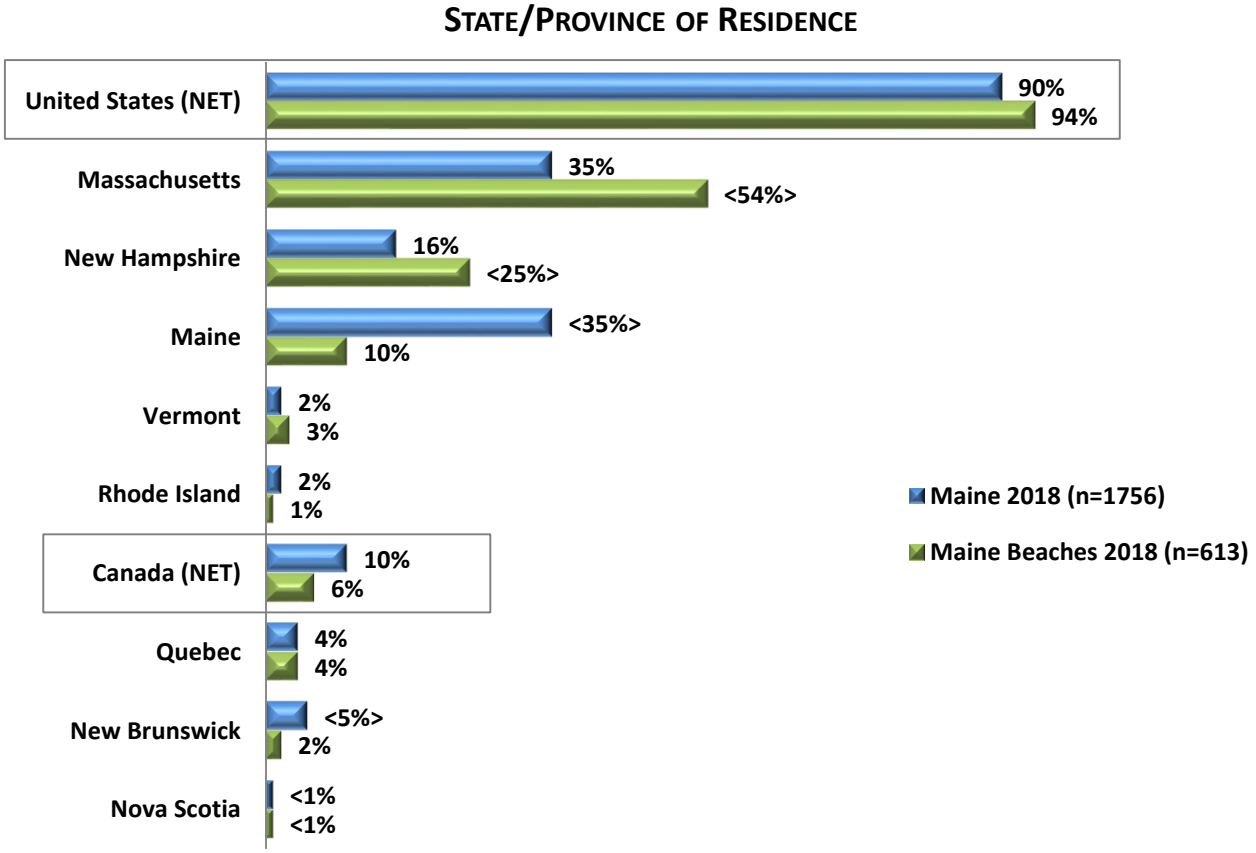
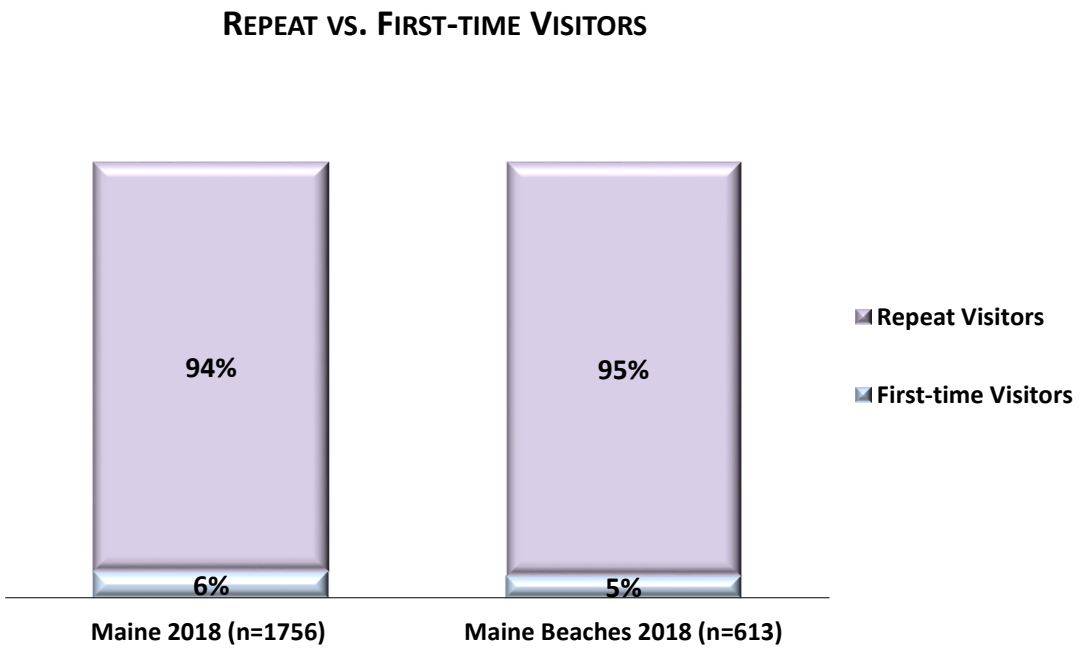
More than half of day visitors to the Beaches region in 2018 came from Massachusetts, and one-quarter were from New Hampshire – significantly higher proportions compared to day travelers statewide.

- On the other hand, visitors to the Beaches region were much less likely than visitors to the state overall to be from Maine.



Q2. In what State or Province do you reside?
<> indicates a significant difference between this region and the State 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 Maine Beaches day visitors in 2018 had traveled to Maine before.



Q10. Was this your first trip to Maine?
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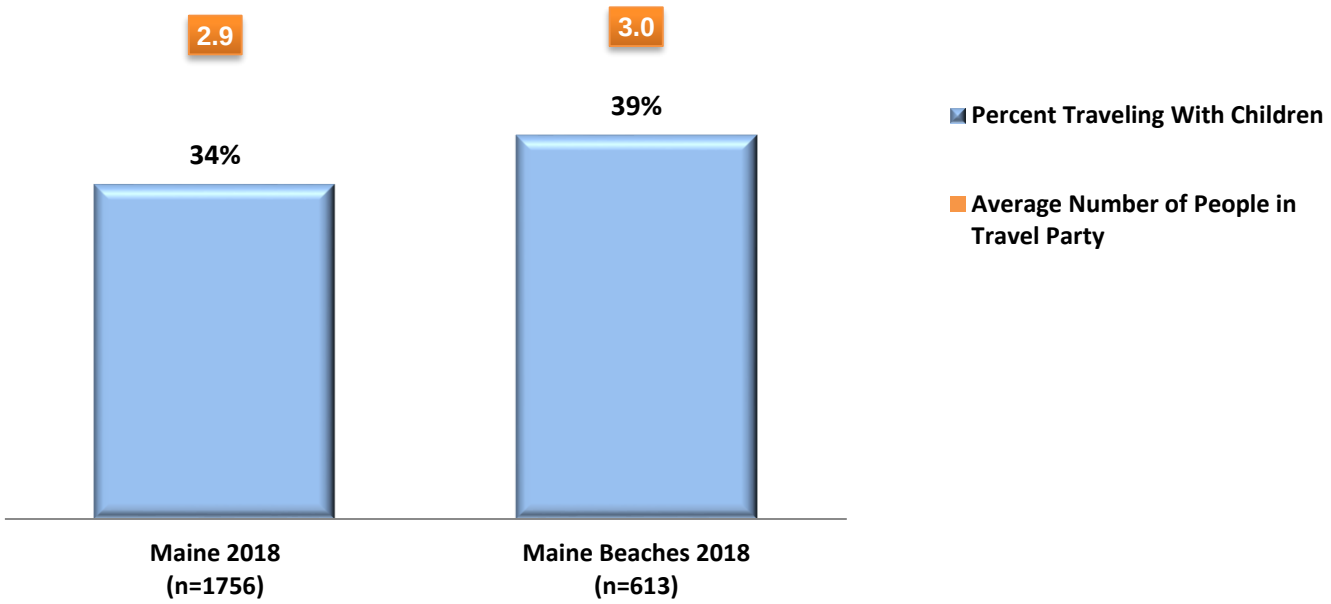
On average, day travel parties to the region consisted of three people. Four out of ten parties included children.

TRAVEL PARTY SIZE AND 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
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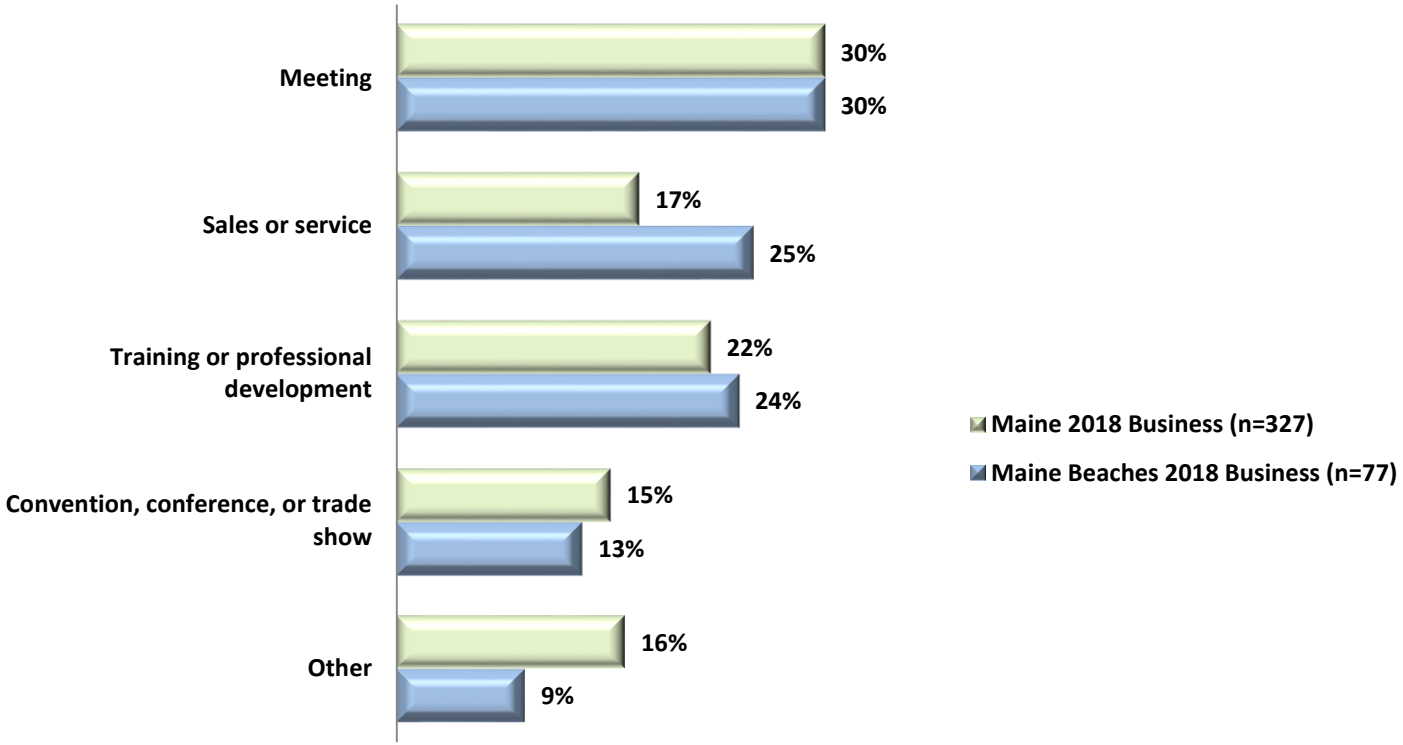
Day Visitors:
Trip Experience

Single-day business trips to the Beaches region were largely driven by meetings, sales or service calls, and professional development.

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 this region and the State at the 95% confidence level.
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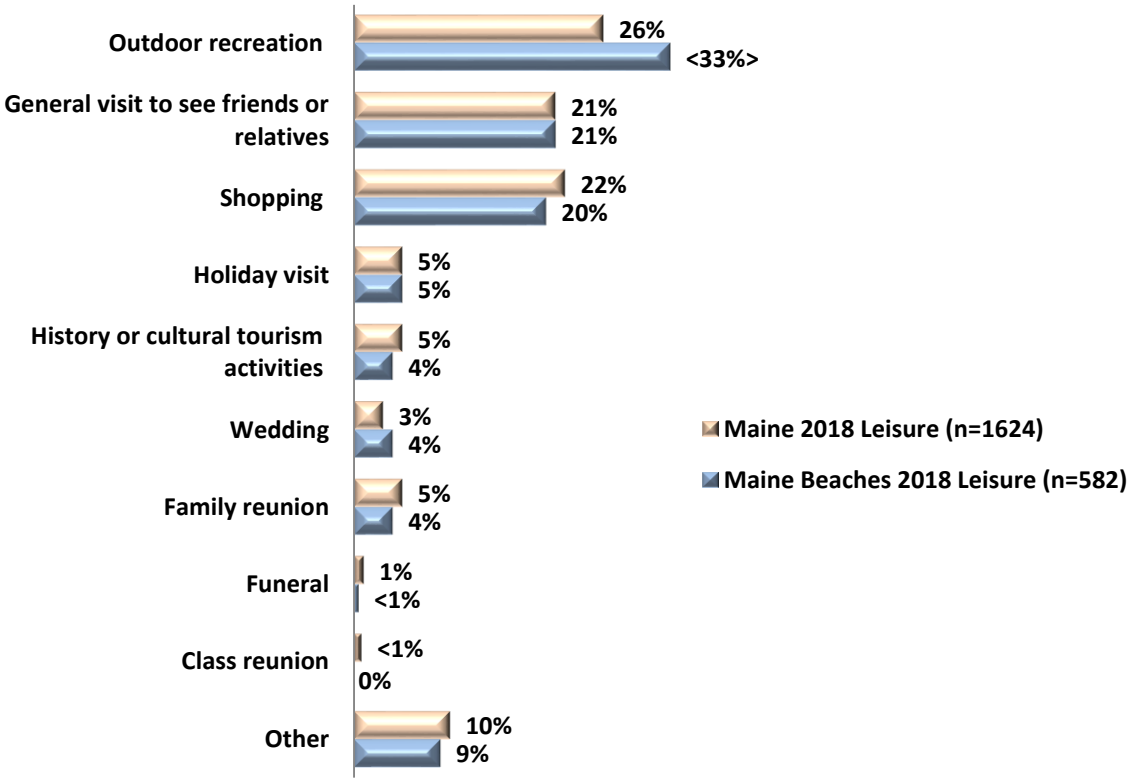
Outdoor recreation was the most common purpose of day leisure trips to the Beaches region in 2018, followed by visits to family or friends and shopping.

- Although it's the most common trip purpose generally, outdoor recreation was more common on trips to the Beaches than among trips to the state overall.

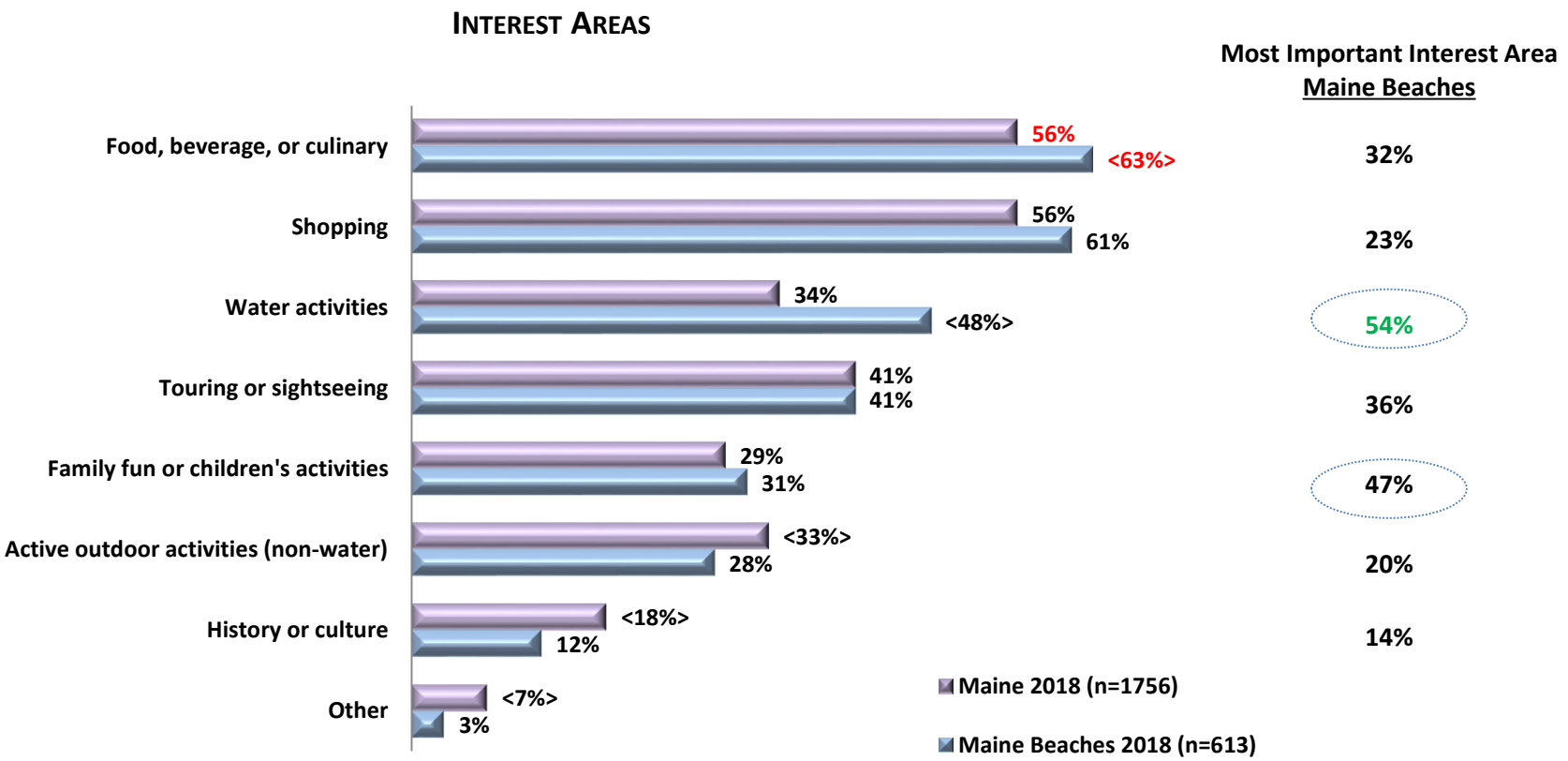
PRIMARY PURPOSE OF DAY LEISURE TRIPS



Q9. What was the primary purpose of your most recent day leisure trip in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.

Culinary and shopping activities were the *most common* interests for day travelers to the region, followed water activities and sightseeing. Water and family fun activities were often the *most important* in driving travel to the region.

- Compared to day travelers statewide, those visiting the Beaches region were significantly more likely to be interested in foods/beverages and water activities.
- Conversely, regional visitors were less likely to be interested in land-based outdoor activities and history/cultural activities.



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.
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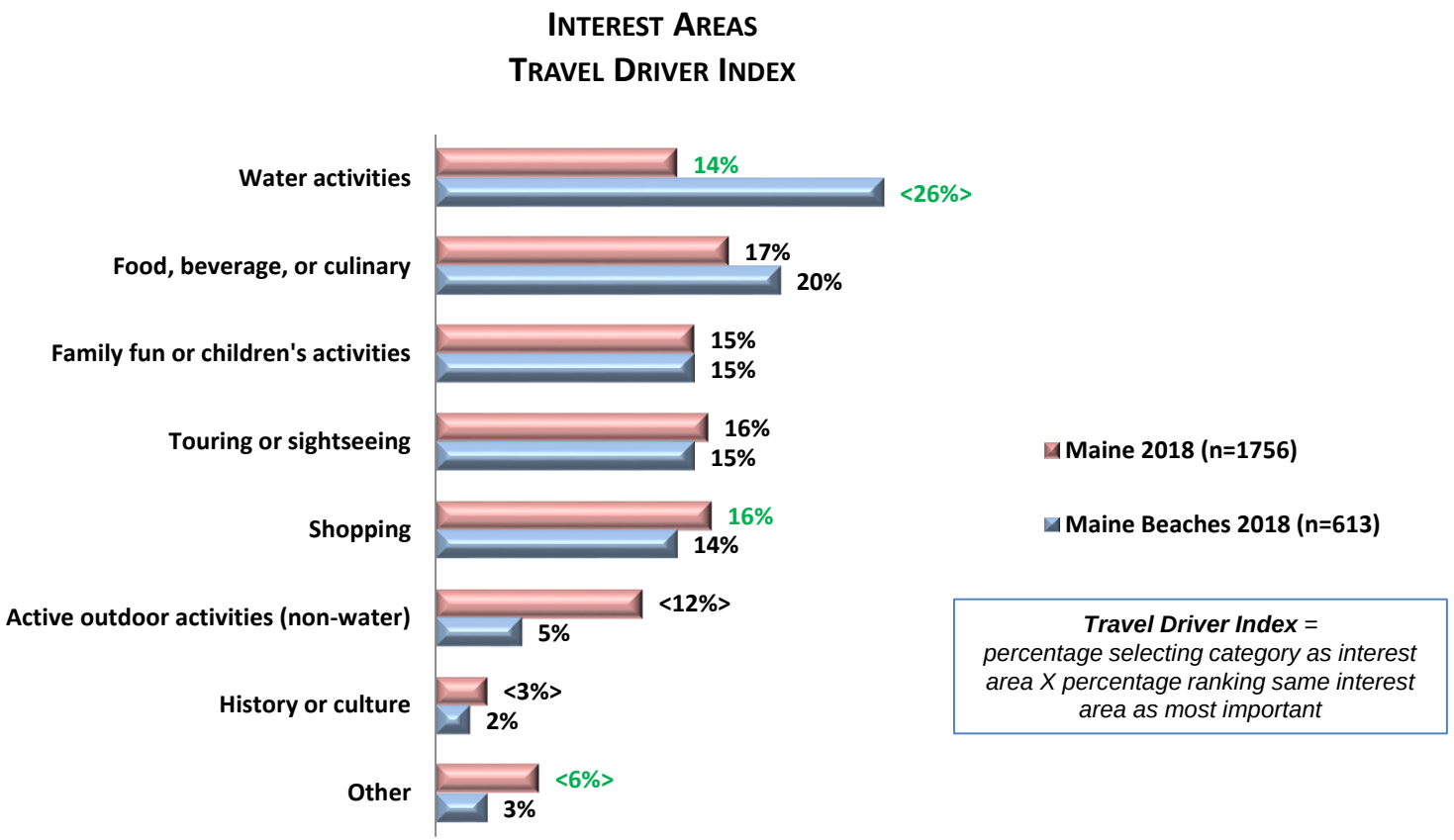
When indexed to take both interest and importance into consideration, water activities emerge as the top driver of day trips to the region in 2018.



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.
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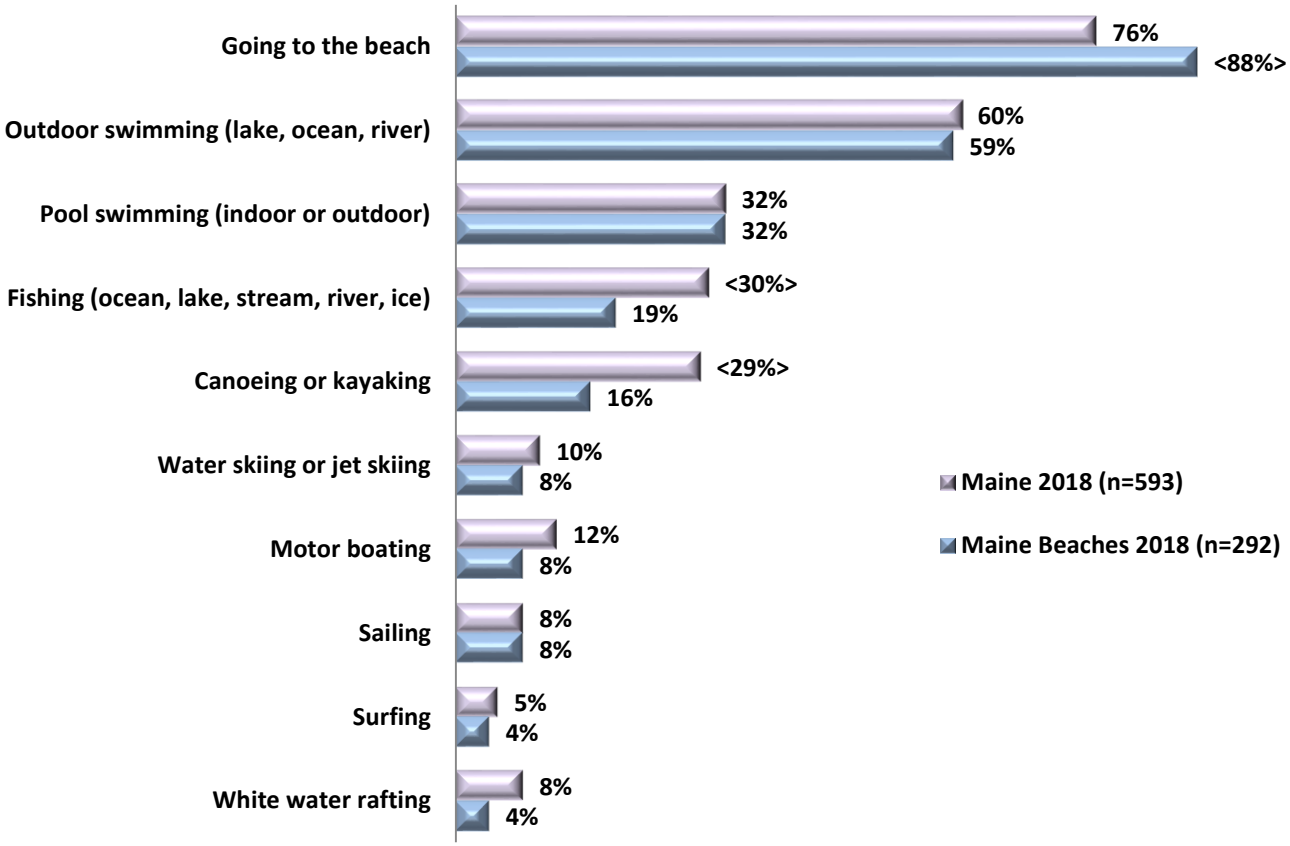
Not surprisingly, huge majorities of day visitors to the Beaches who were interested in water activities went to the beach. Most also went swimming.

- Compared to day travelers statewide, those visiting the Beaches region were more likely to go to the beach, but less likely to go fishing or canoeing/kayaking.

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*.
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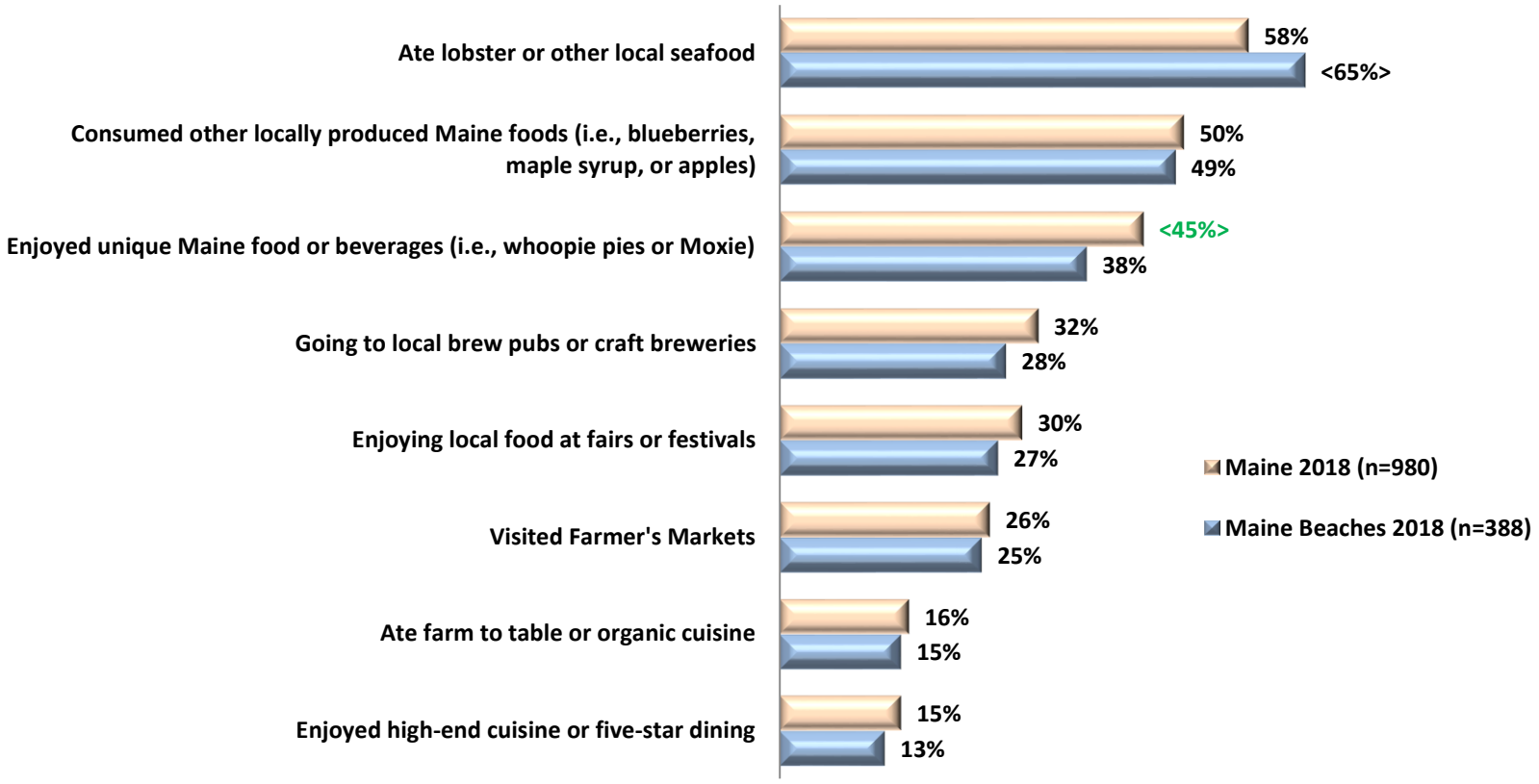
Eating seafood was the most common culinary activity among day trippers to the Beaches region, though enjoying other local or unique foods and beverages was relatively popular as well.

- Day visitors to the region were more likely than day visitors to the state to eat seafood, but were less likely to eat other unique Maine cuisine.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

(Base: Those who report food, beverage, or culinary 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*.
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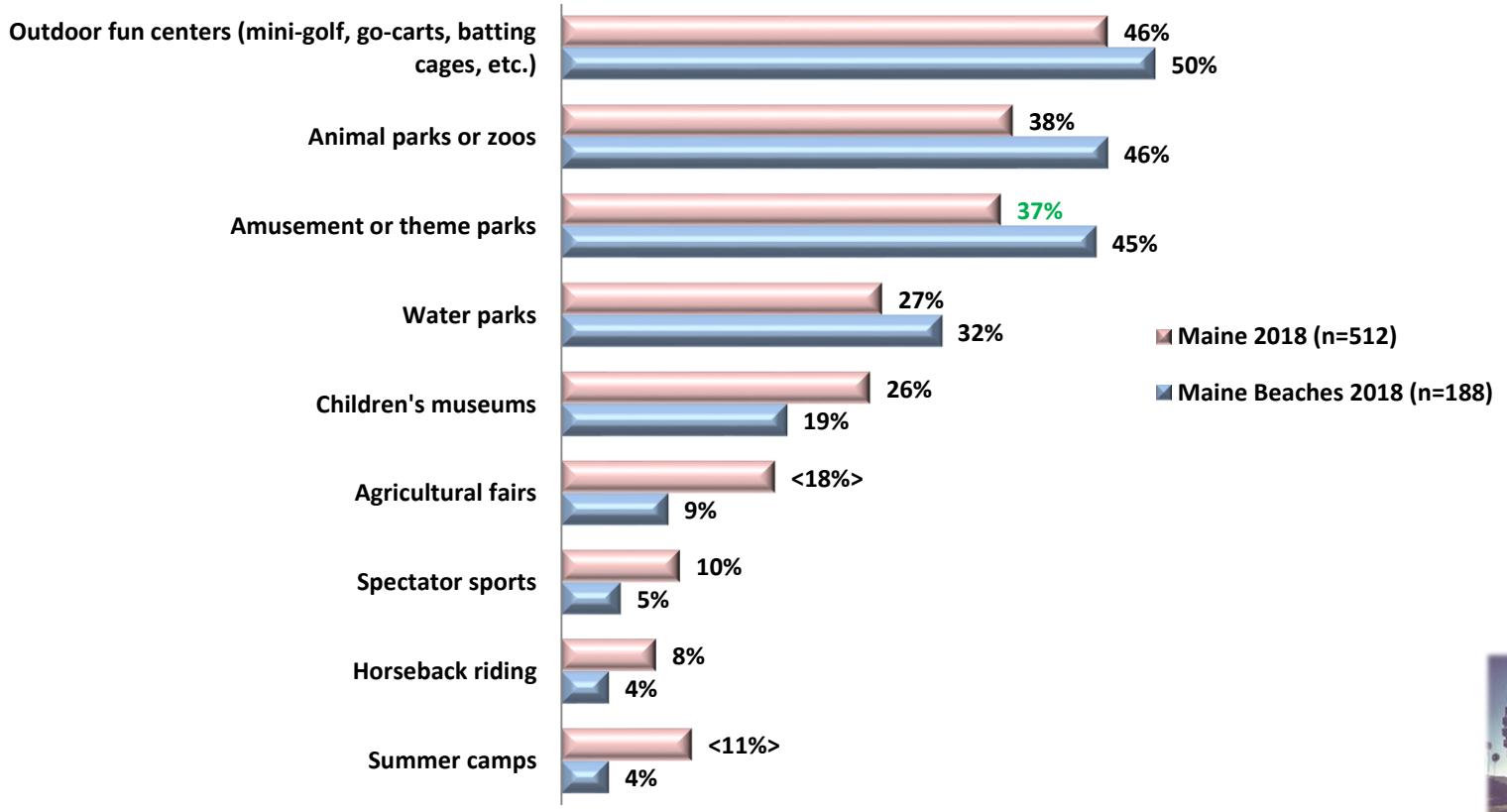
Outdoor fun centers, animal parks, and amusement parks were the most popular family activities for day visitors to the region in 2018. Many also went to water parks.

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*.
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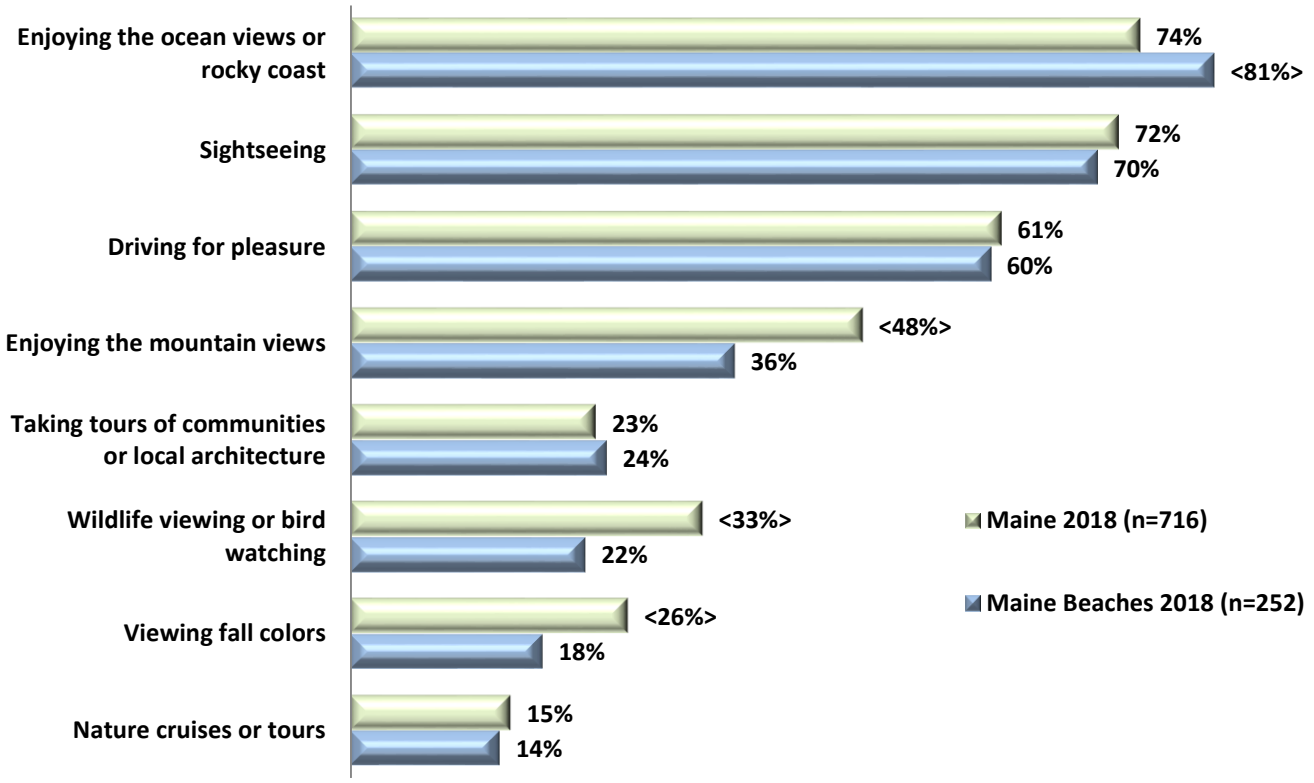
Enjoying the coast was the most common sightseeing activity for day visitors to the region, followed by sightseeing generally and going for a pleasure drive.

- Day visitors to the region were more likely than day visitors to the state overall to enjoy the views of the coast, but less likely to see the mountains, see wildlife, and view fall colors.

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 this region and the State at the 95% confidence level.
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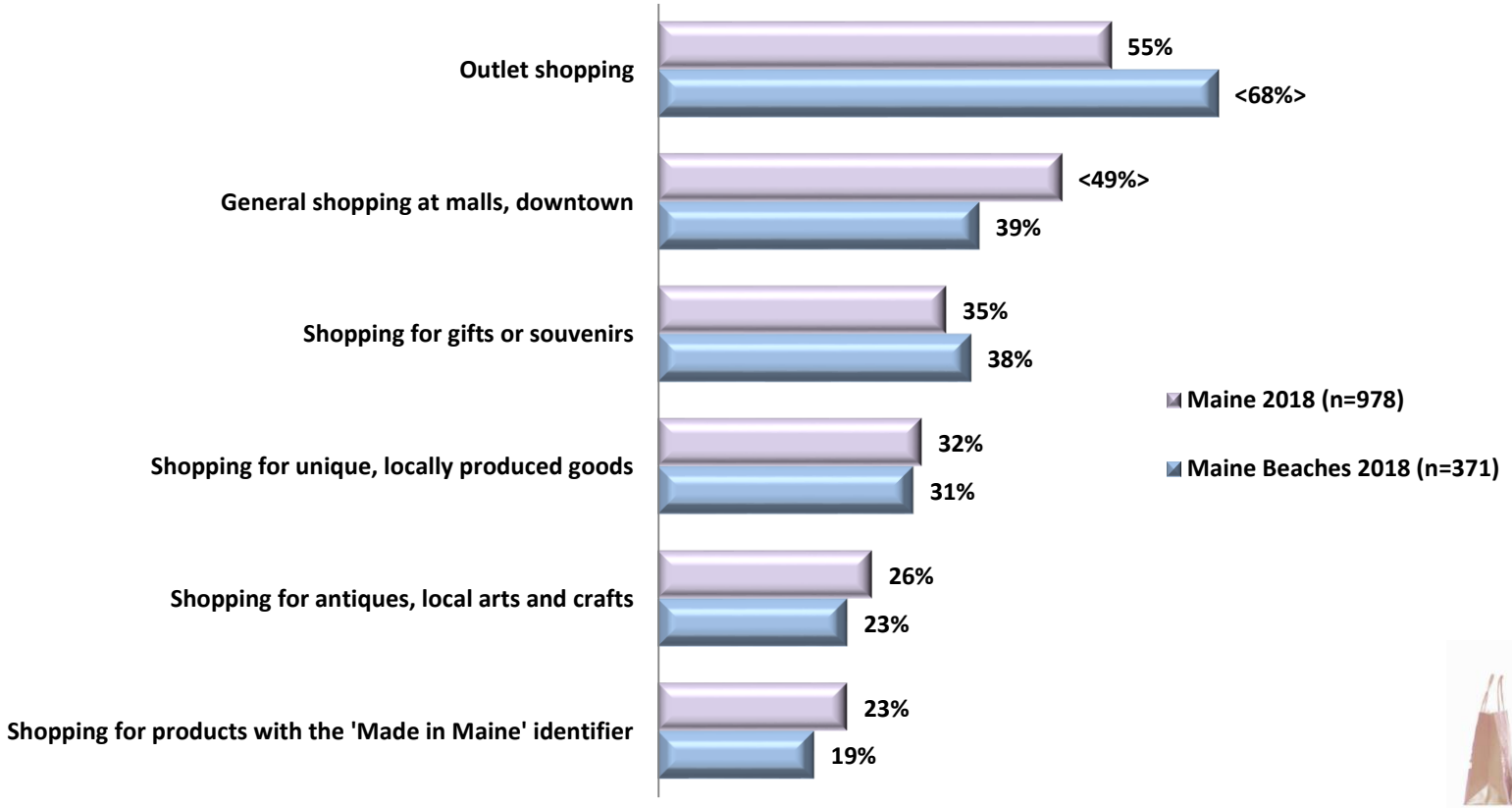
Visiting outlets was the most common shopping activity for day visitors to the region, though a variety of other types of shopping were also relatively common.

- Day visitors to the region were more likely than visitors to the state overall to go outlet shopping; they were less likely to go shopping at malls or in downtown districts.

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 this region and the State at the 95% confidence level.
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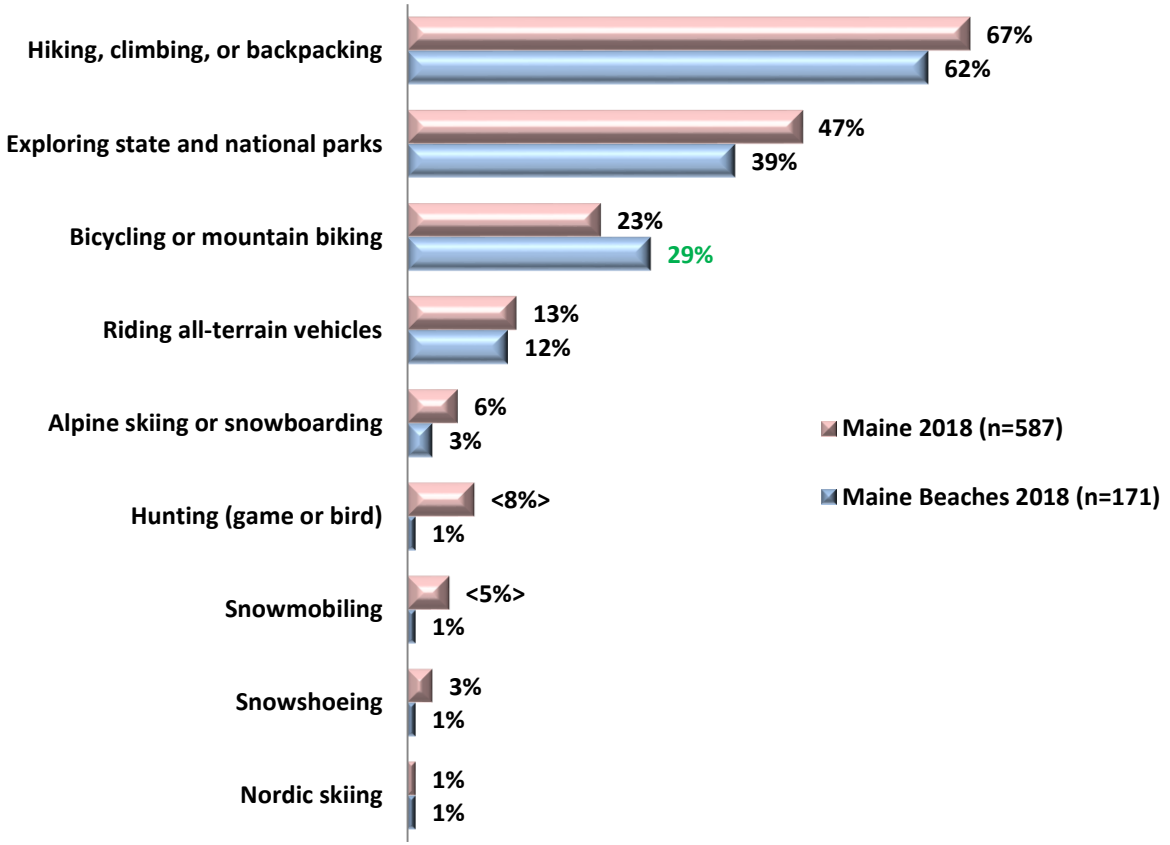
Hiking or backpacking was, by far, the most popular land-based active outdoor activity for day visitors in the region, followed by exploring state and national parks and biking.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

(Base: Those who report outdoor non-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*.
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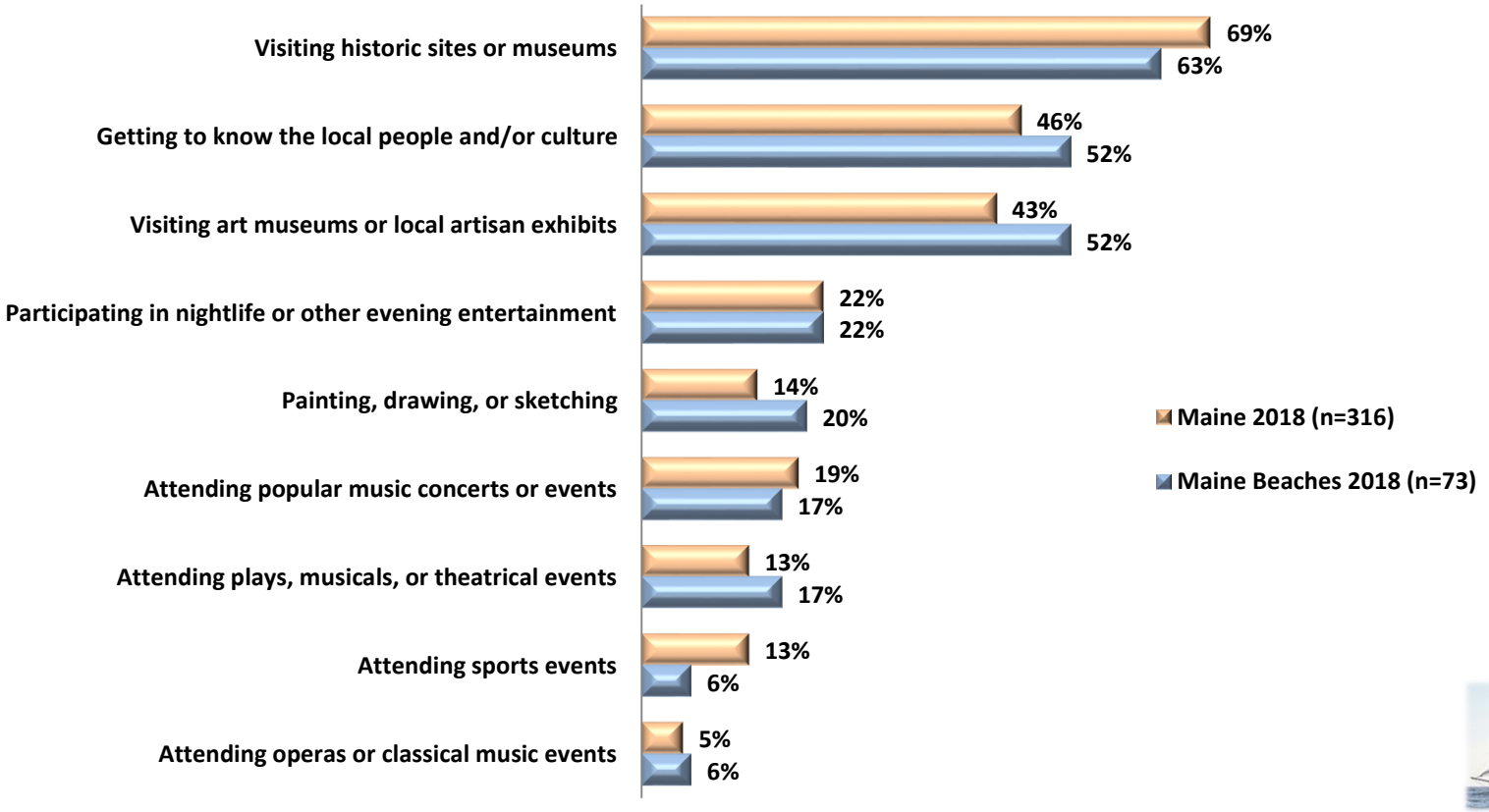
Going to historic sites, getting to know the locals, and visiting art exhibits were the most common cultural activities among day travelers to the region.

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*.
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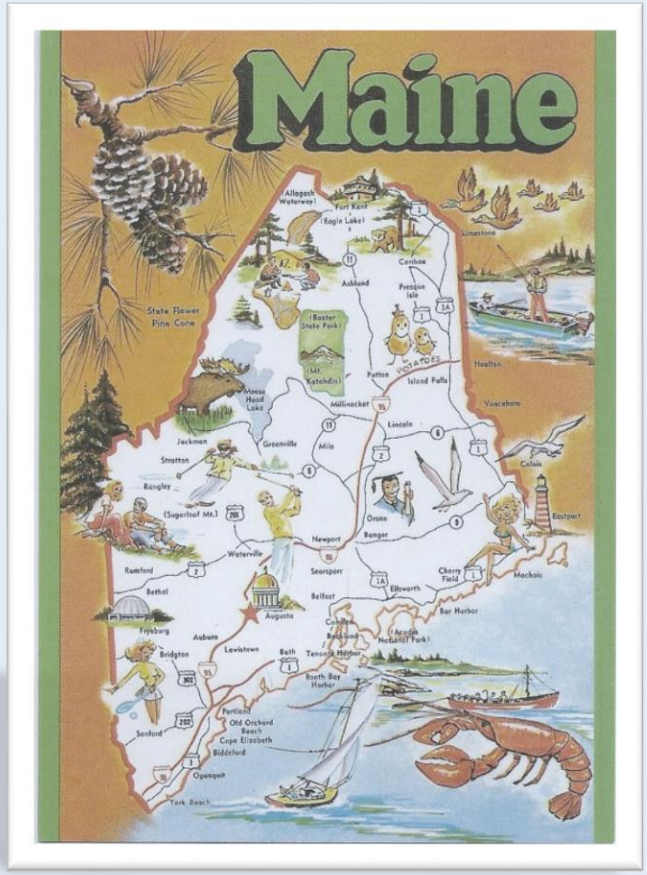
The Kittery Shopping Outlets continue to be the top attraction in the region, though many also visited York, Old Orchard Beach, and Kittery.

Top destinations		Less popular destinations*	
41%	Kittery Shopping Outlets	15%	Wells
35%	York	15%	Perkins Cove
34%	Old Orchard Beach	13%	Marginal Way
32%	Kittery	13%	Short/Long Sands Beach
29%	Kittery Trading Post	12%	The Kennebunks
28%	Ogunquit Beach	10%	Funtown Splashtown USA
25%	Ogunquit	10%	Fun-O-Rama
24%	Old Orchard Beach Pier	9%	Biddeford/Saco
21%	Wells Beach	9%	Palace Playland
21%	Cape Neddick 'Nubble' Light	7%	Dock Square, Kennebunkport
18%	Kennebunk Beach	6%	Aquaboggan Water Park
18%	York's Wild Kingdom	6%	Ferry Beach State Park
		5%	Sanford

** Does not include options selected by fewer than 5% of surveyed travelers.*

Research Objectives and Methodology



Research Objectives and Instruments

Three distinct online surveys are used to achieve the five primary goals of Maine's visitor tracking research.

	Survey Instruments		
Research Objectives:	National Travel Survey	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 generated by 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

- 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

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

Survey Fielding

- Survey results were collected during calendar year 2018, for travel to Maine occurring from December of 2017 through November of 2018. The number of respondents participating for the statewide survey is:

Research Component	2018 Completed Surveys
Overnight Visitor Survey	2,901
Day Visitor Survey	1,756
National Travel Survey	20,579

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