

Maine Office of Tourism
Visitor Tracking Research
2018 Calendar Year Annual Report



Regional Insights:
Mid-Coast



Prepared by
dpa 
providing direction
in travel & tourism
A Division of DRI

May 2019



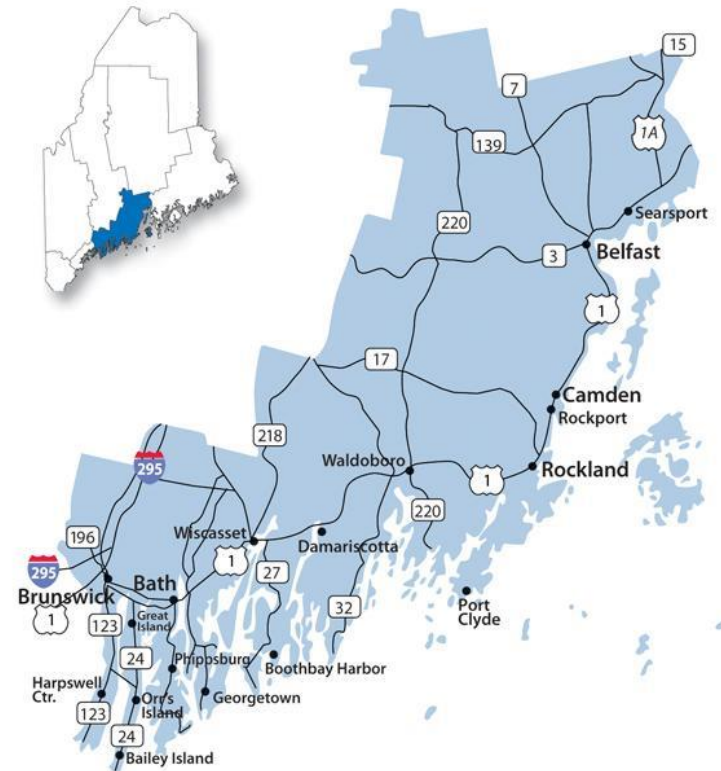
Regional Insights: Maine Mid-Coast

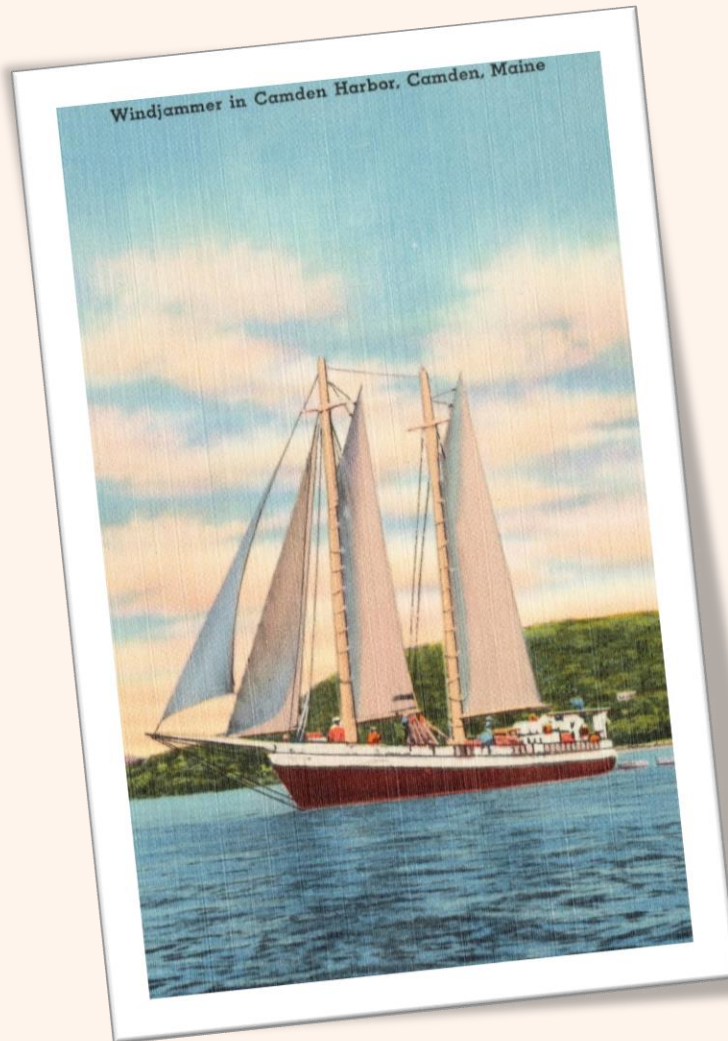
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Introduction

- The following report provides a profile of visitors and their trips to the **Mid-Coast tourism region** during 2018, from a survey of:
 - 301 overnight visitors, and
 - 156 day visitors.
- Throughout this report, data for the **Mid-Coast** 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 **Mid-Coast** 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
Mid-Coast Region:
How They Are
Unique

Comparisons: Region vs. State

- Visitors to the Mid-Coast tourism region and visitors to the state of Maine as a whole in 2018 differed in several important areas, including:
 - ✓ Visitor origin,
 - ✓ Size of travel party,
 - ✓ Travel interests, and
 - ✓ The activities they participated in while visiting.

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

Visitor Origin and Travel Party

Visitors to the Maine Mid-Coast region, compared to visitors statewide, were...

Day Visitors

More likely to be Maine residents.

Traveling in slightly **smaller parties**.

Trip Interest Areas

Visitors to the Maine Mid-Coast region, compared to visitors statewide, were...

Overnight Visitors

More likely to have traveled primarily to visit family or friends.

More likely to be interested in culinary activities.

Trip Interests and Importance (Travel Driver Index)

Visitors to the Maine Mid-Coast region, compared to visitors statewide, were...

Overnight Visitors

Less likely to have active outdoor activities drive their trip to Maine.

Trip Activities

Visitors to the Maine Mid-Coast region, compared to visitors statewide, were...

Overnight Visitors

More likely to:

- Eat lobster or other local seafoods, and
- Enjoy coastal/ocean views.

Less likely to:

- Shop at outlets, and
- Go on nature cruises/tours.

Day Visitors

More likely to enjoy coastal/ocean views.

Trip Activities

Visitors to the Maine Mid-Coast region, compared to visitors statewide, were...

Overnight Visitors

More likely to go motor boating.

Less likely to:

- Attend opera/classical music events,
- Ride all-terrain vehicles, and
- Alpine ski or snowboard.

Day Visitors

Less likely to:

- Attend a summer camp,
- Bike, and
- Canoe/kayak.

Visitation and Economic Impact Summary

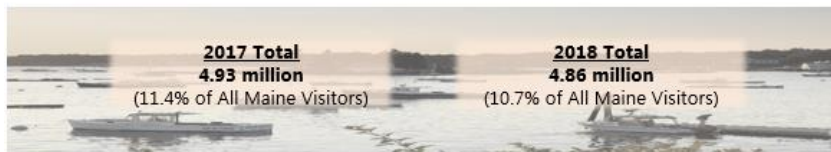


Visitation and Economic Impact Summary: Mid-Coast

2018 Regional Tourism Impact Estimates



An estimated **4.86 million** travelers visited the Mid-Coast region in 2018 ~ a **1.3% decrease** from 2017.



Number of Visitors to the Mid-Coast Region

* Percent of estimated total Maine day visitors

2.54 million
(11.0%)*

2.50 million
(10.1%)*

** Percent of estimated total Maine overnight visitors

2.39 million
(11.8%)**

2.36 million
(11.5%)**

2017

2018

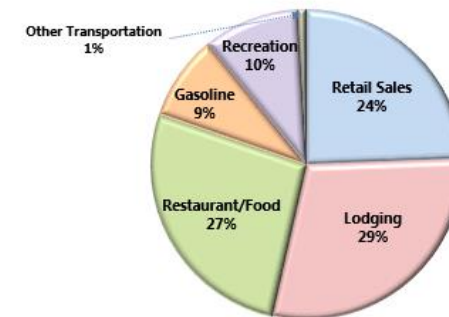


The visitation estimates shown above include all visitors on tourism-related trips. Tourism related trips include: all leisure trips, trips that are a general visit to see friends or relatives, a wedding, a holiday visit, and business trips that are for a convention/conference/trade show or training/professional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

2018 Regional Tourism Impact Estimates



In 2018, Mid-Coast visitors spent **\$655.5 million** ~ down **6.8%** from 2017.



The \$655.5 million spent by visitors to the Mid-Coast 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, restaurateurs 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.

10,726 jobs

\$200.6 million
in total
earnings

\$61.8 million
in total
taxes



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

- The average surveyed visitor to the Mid-Coast region in 2018 was 40 years old and had an annual income of \$85,000.
- Seven out of ten had a college degree, six out of ten were employed full-time, and almost half were married.

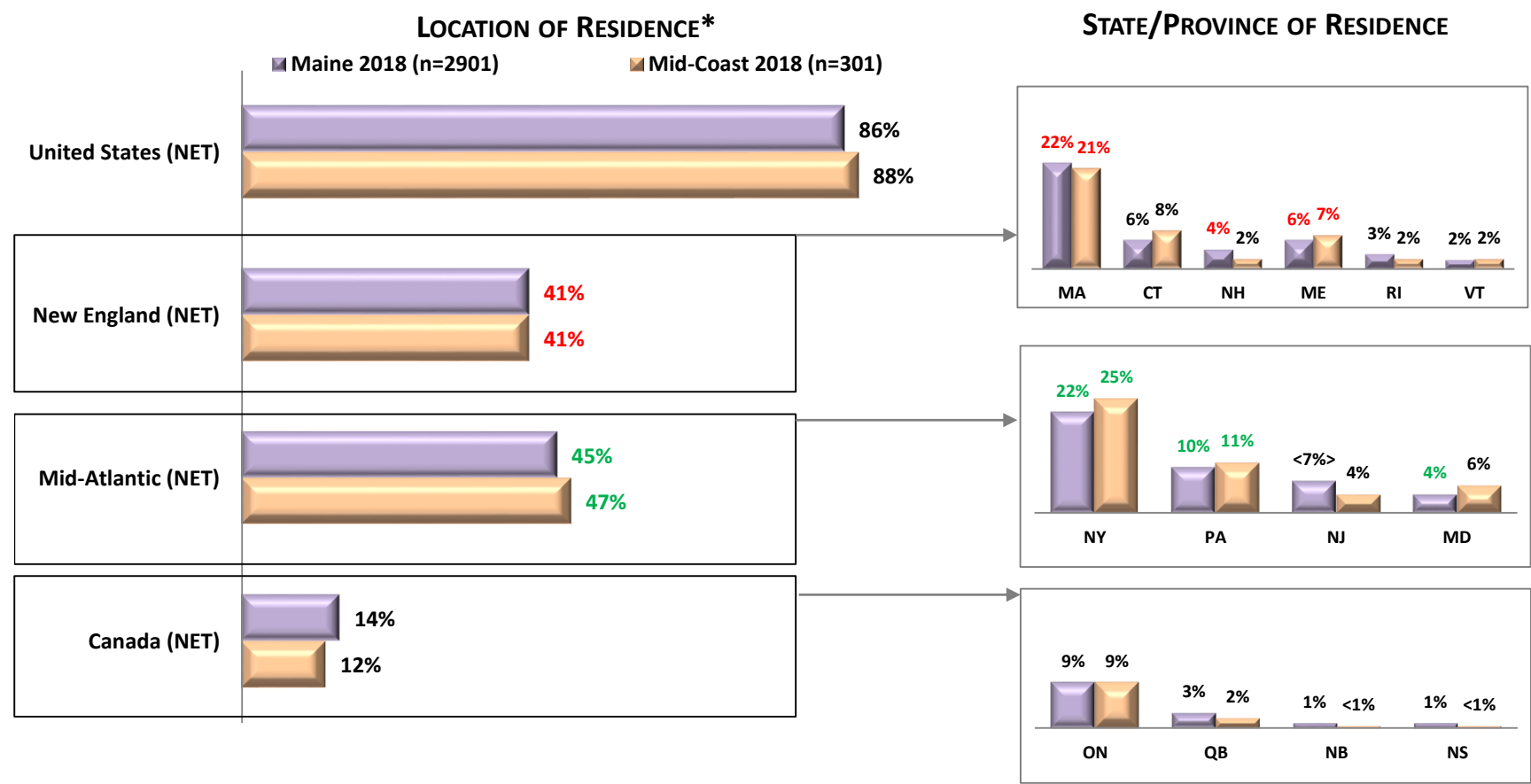
	Maine 2018 (n=2901)	Mid-Coast 2018 (n=301)
Age:		
< 35	46%	41%
35 - 44	23%	25%
45 - 54	14%	13%
55 +	17%	21%
Mean	39.0	40.4
Income:		
< \$50,000	27%	28%
\$50,000 - \$99,999	43%	45%
\$100,000 +	30%	27%
Mean	\$86,400	\$85,000
Female	66%	63%
College degree or higher	65%	70%
Married	47%	46%
Employed full-time	62%	63%

<> 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 Mid-Coast region in 2018 were U.S. residents. Just under half originated from Mid-Atlantic states (most often New York), though many came from New England (most often Massachusetts).

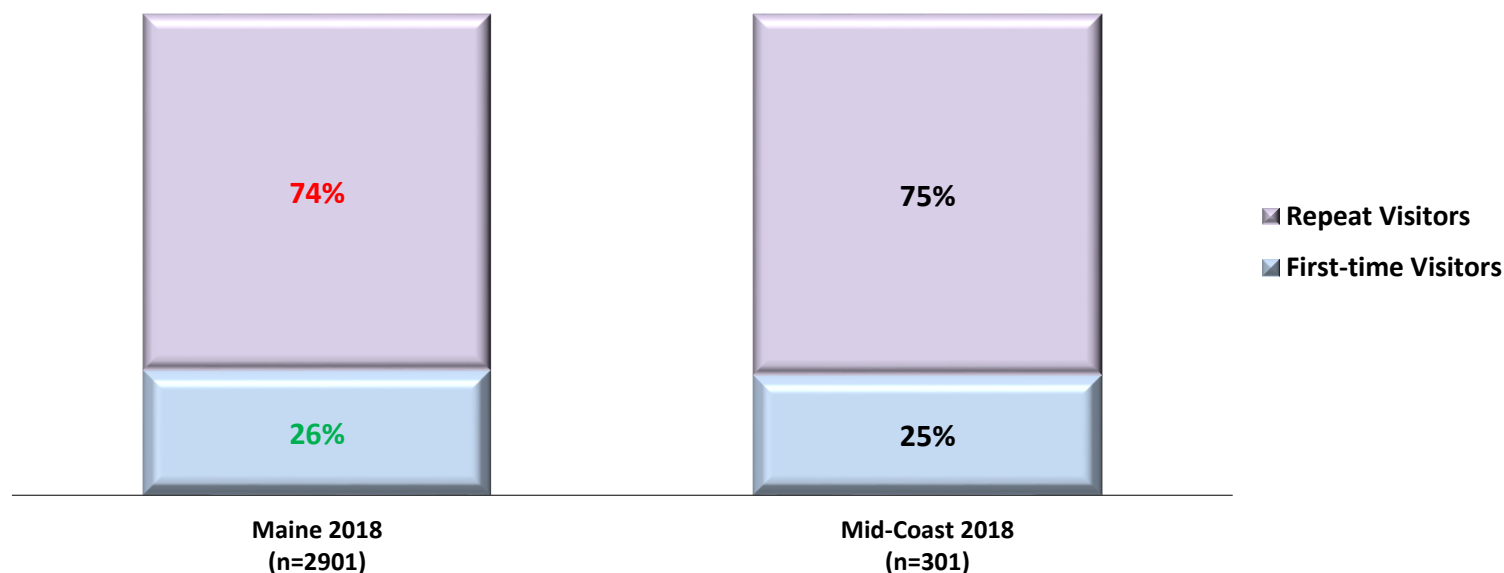
➤ Most of those visiting from Canada were from Ontario.



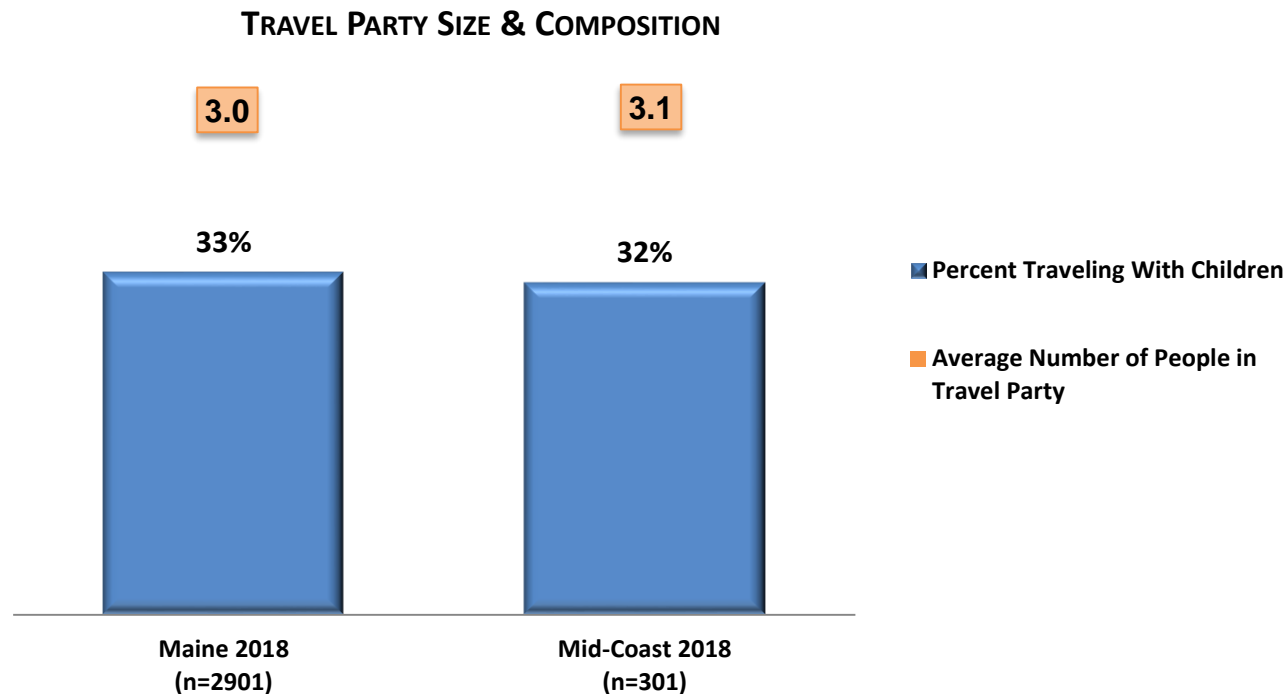
*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.
< > indicates a significant difference between this region and the State at the 95% confidence level.
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As with overnight visitors across the state, one-quarter of the overnight visitors to the Mid-Coast region were traveling to Maine for the first time.

REPEAT VS. FIRST-TIME VISITORS



Mid-Coast travel parties mirrored those of statewide overnight visitors in 2018, with an average size of about 3 people and one-third including children.

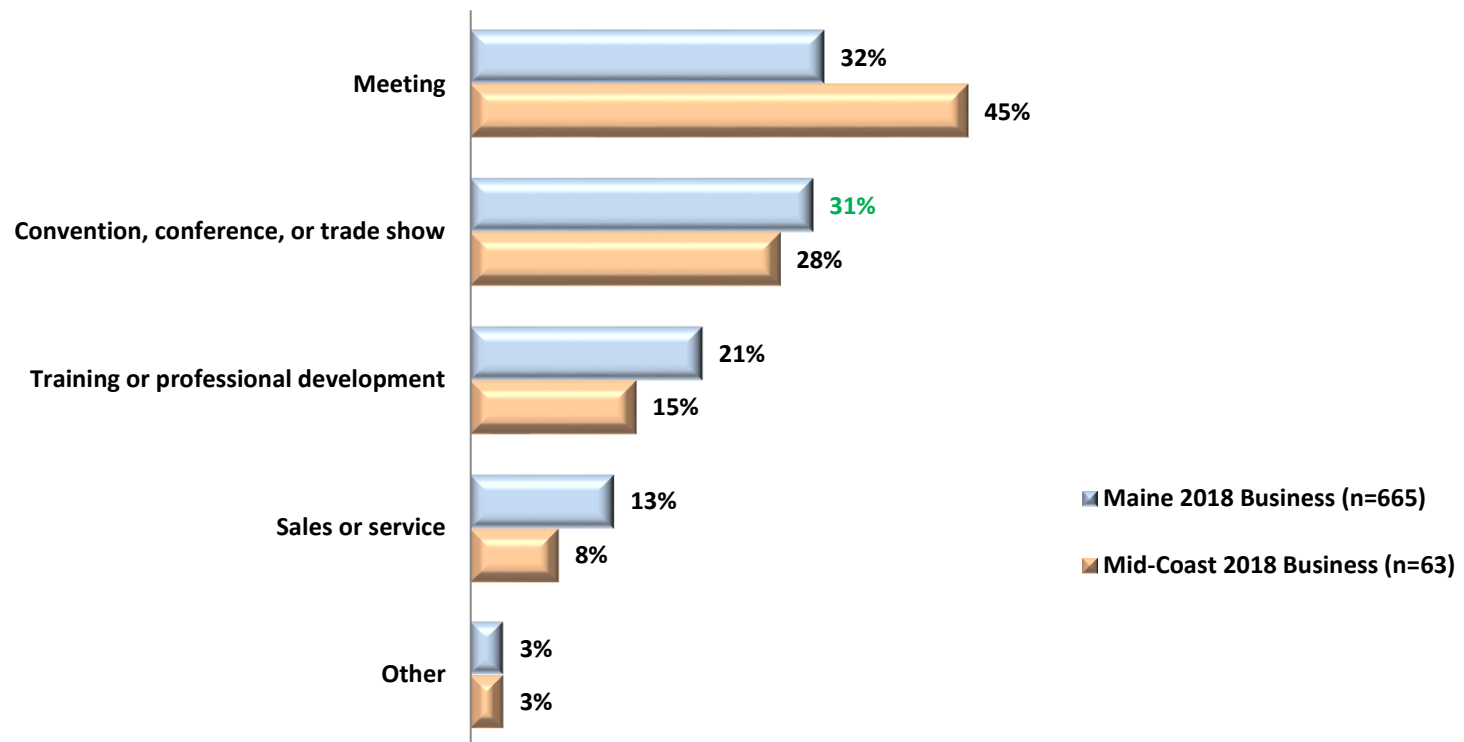




Overnight Visitors: Trip Experience

Meetings were the most common reason overnight business travelers came to the Mid-Coast region, though many overnight business travelers attended a convention, conference, or trade show.

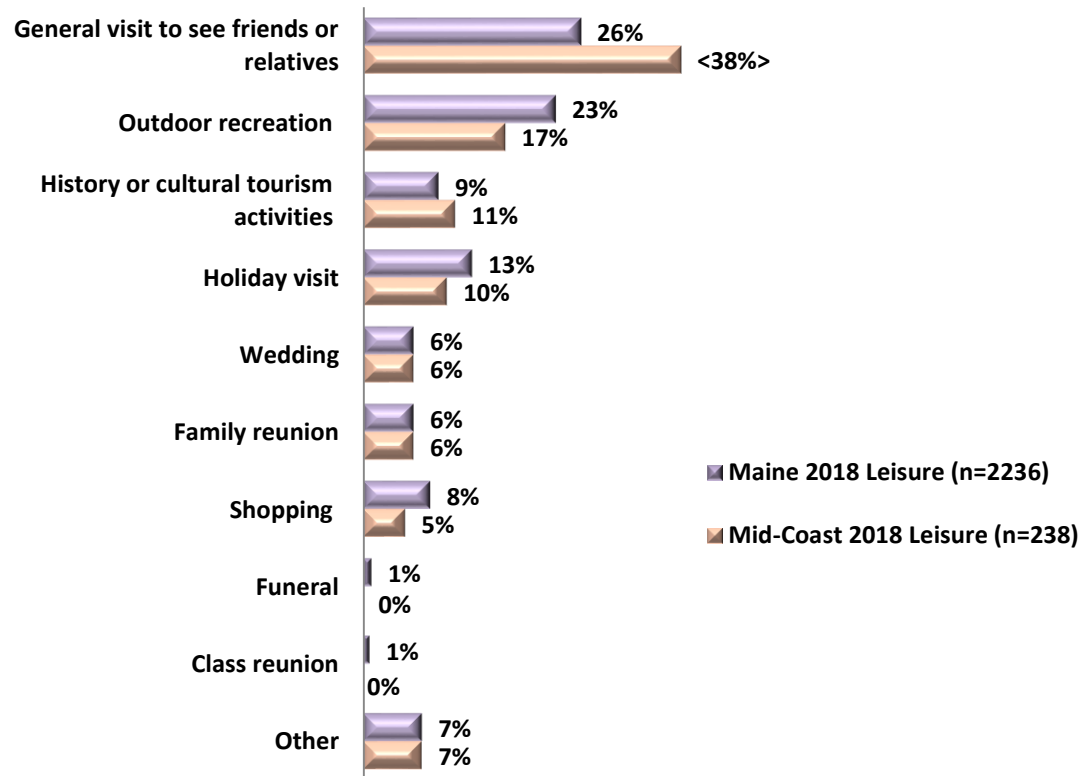
PRIMARY PURPOSE OF OVERNIGHT BUSINESS TRIPS



Visiting friends or family was the most common purpose of leisure trips to the Mid-Coast area, though outdoor recreation was also relatively common as well.

- General visits to see friends or family were more common among overnight visitors to the Mid-Coast region than among overnight visitors statewide.

PRIMARY PURPOSE OF OVERNIGHT LEISURE TRIPS

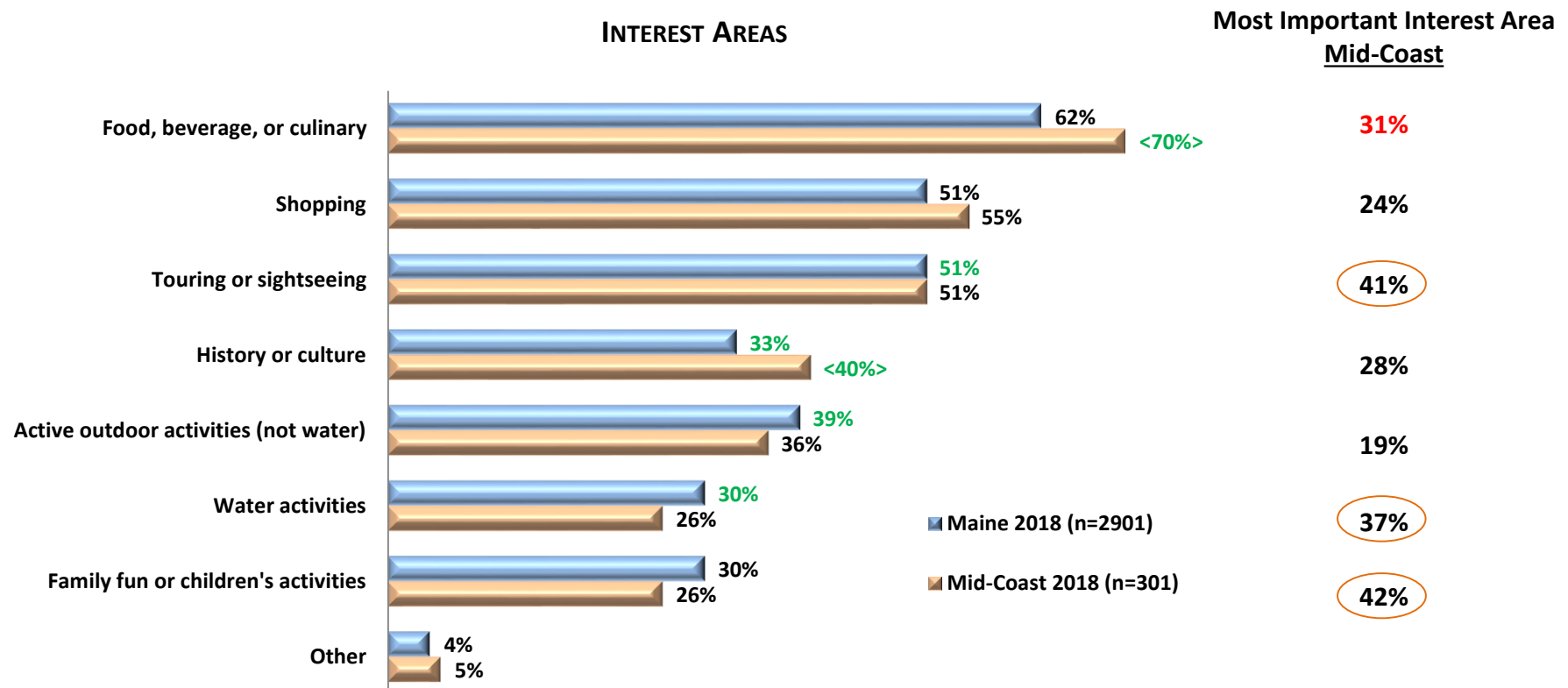


Q9. What was the primary purpose of your most recent leisure trip in Maine?

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

Culinary pursuits were the *most common* interest area of overnight visitors to the region, followed by shopping and sightseeing. Sightseeing, family fun, and water activities were most likely to be named as the *most important* interest.

- Compared to statewide overnight visitors, those coming to the Mid-Coast region were more likely to report an interest in culinary and cultural activities.



Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

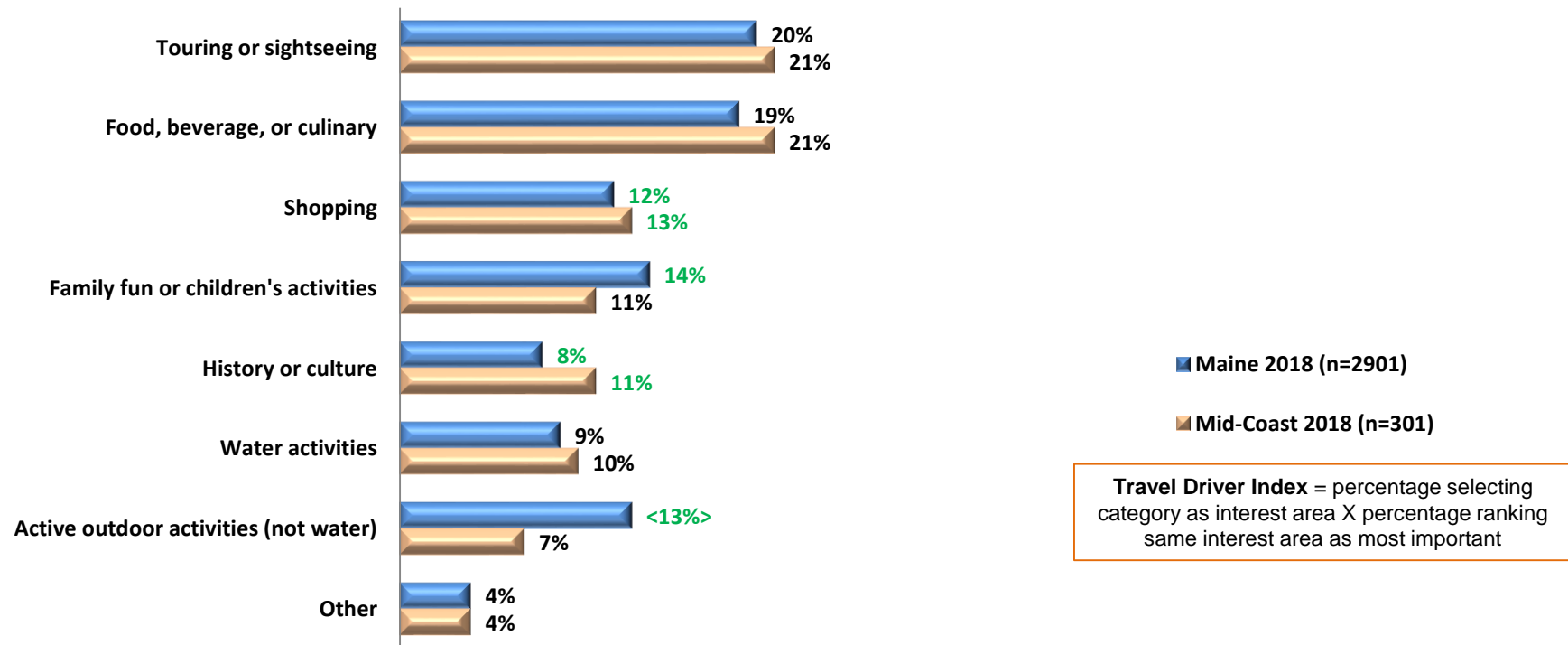
Q36. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<> 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.

A metric that combines interest and importance, the Travel Driver Index, shows that sightseeing and culinary activities were the strongest drivers of overnight visitation to the region.

TRAVEL DRIVER INDEX

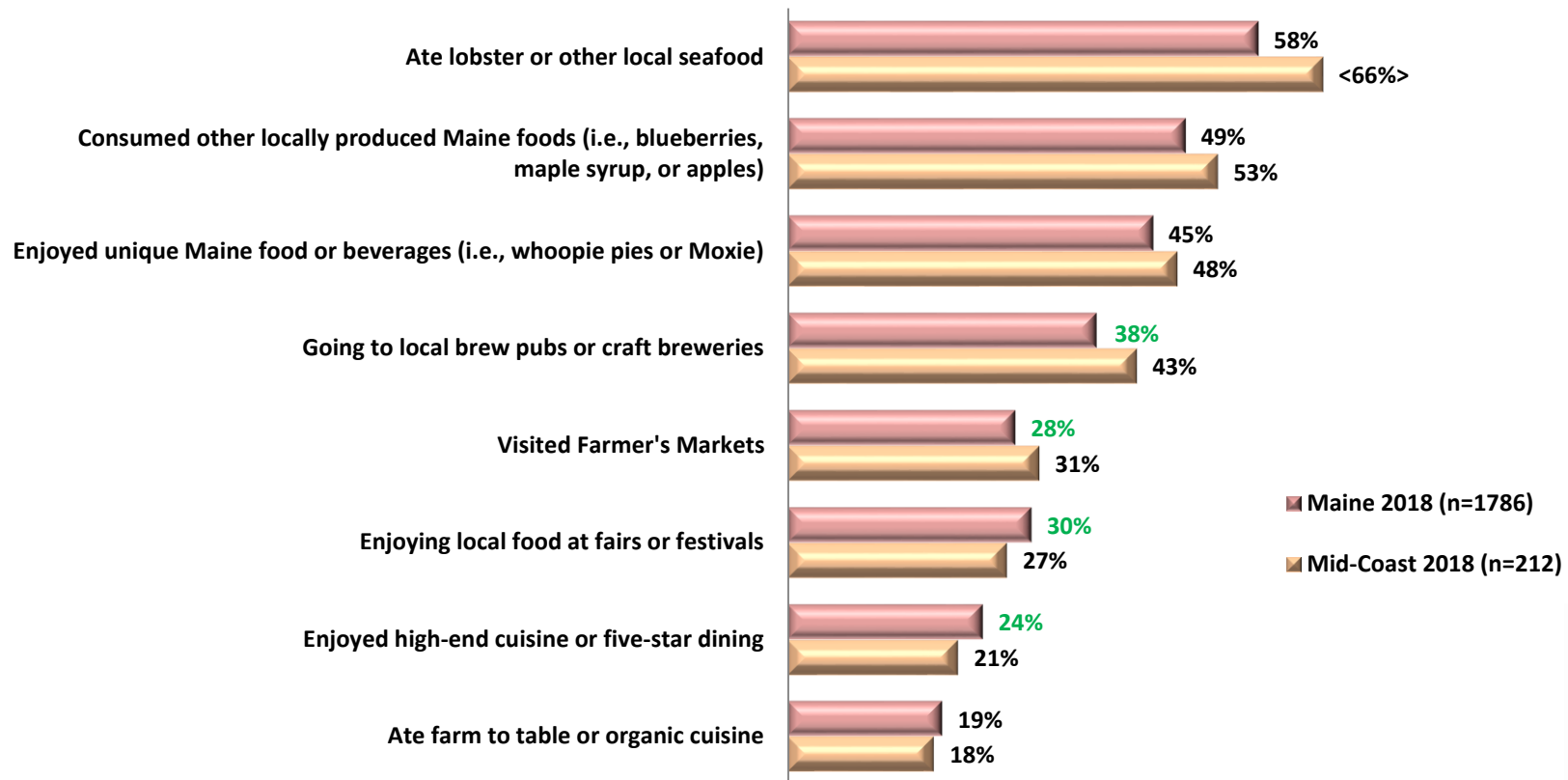


Two-thirds of overnight visitors interested in food and beverages ate lobster or other seafood when visiting the Mid-Coast. About half consumed other local or unique Maine foods, and about four out of ten went to a brew pub or brewery.

- Consumption of lobster/seafood was more common among those coming to the region than it was among overnight visitors statewide.

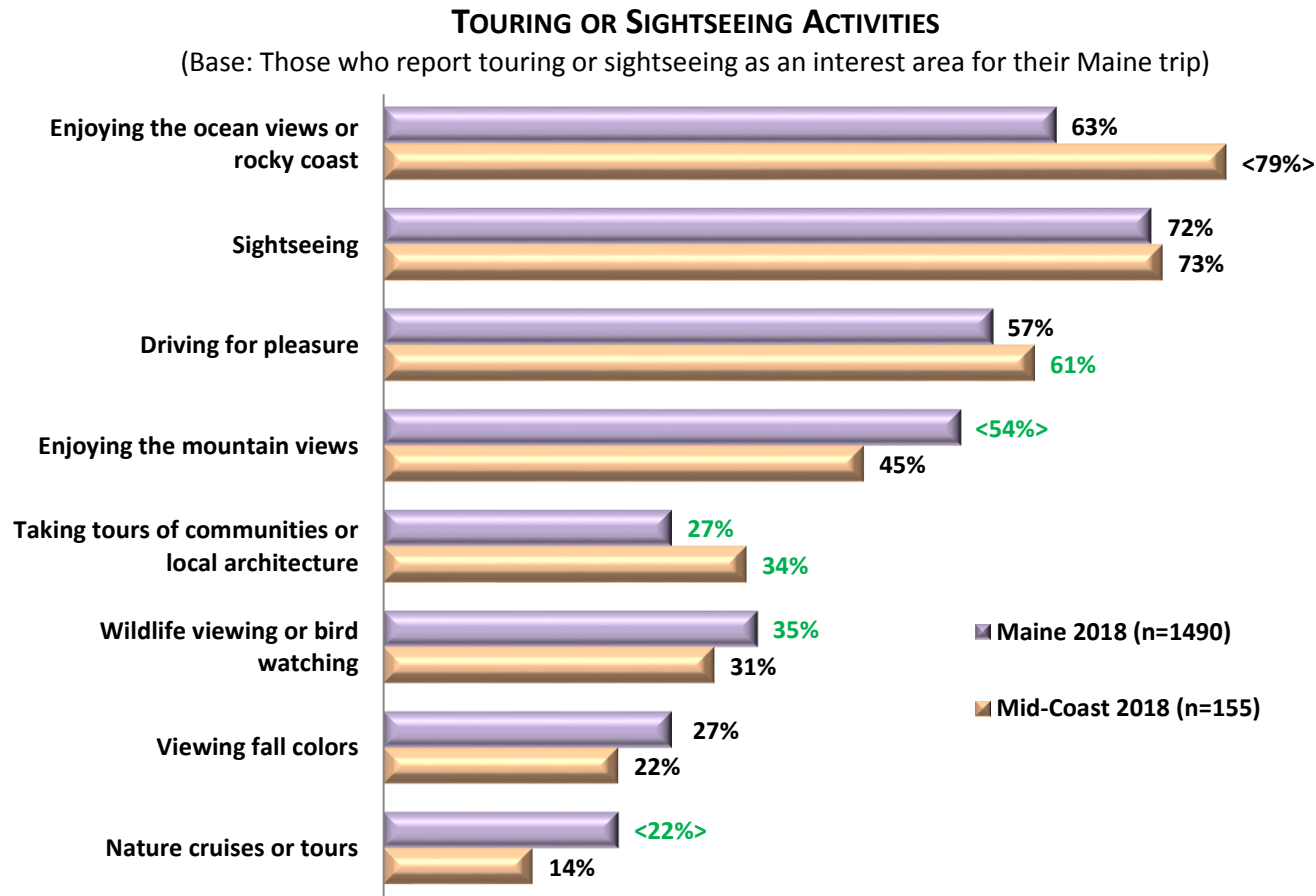
FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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

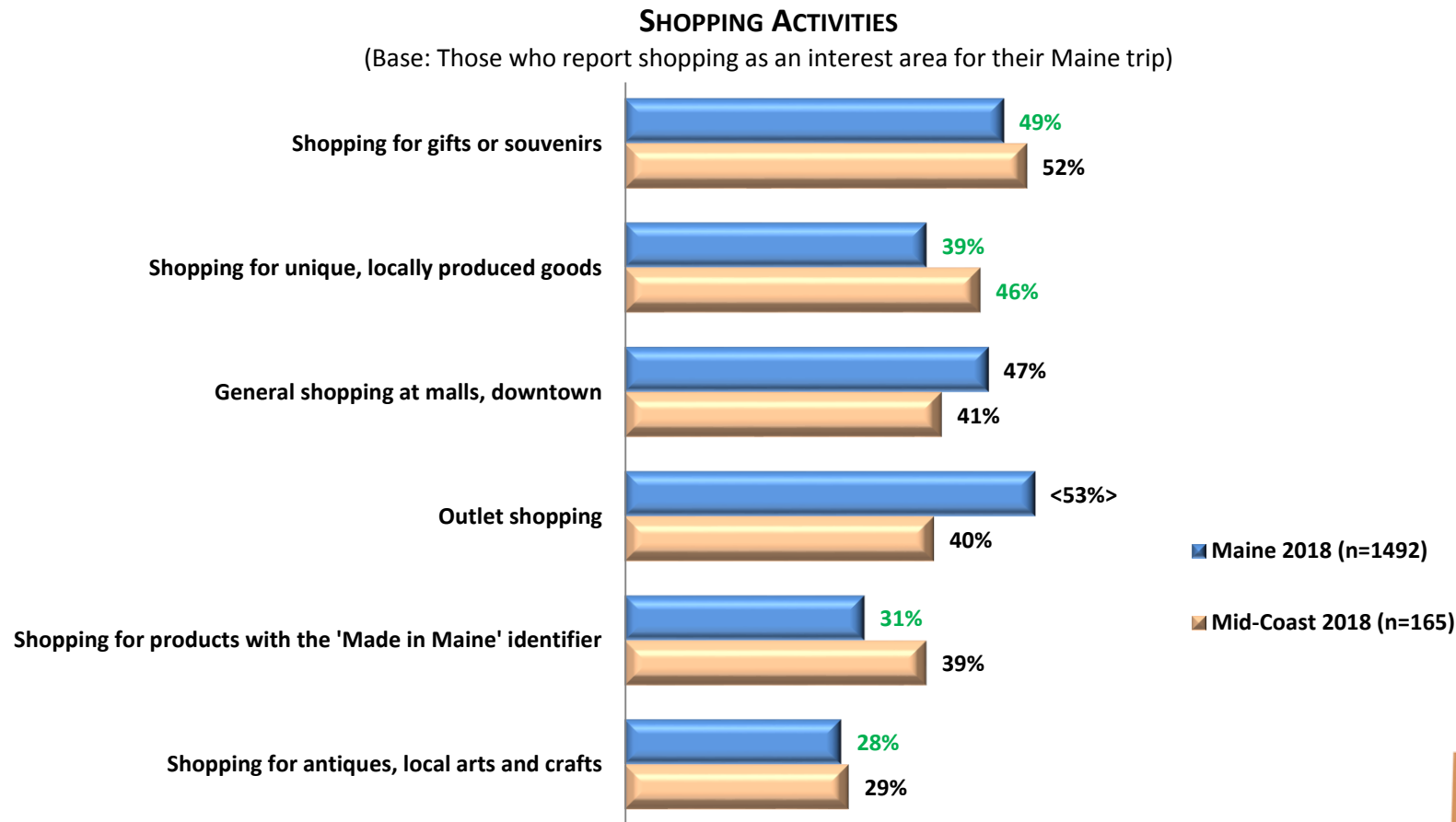


Roughly three out of four overnight visitors who were interested in seeing the area enjoyed the ocean views or went sightseeing in the Mid-Coast region. Three out of five went for a pleasure drive.

- Enjoying the ocean views was more common among Mid-Coast visitors than among overnight visitors statewide.



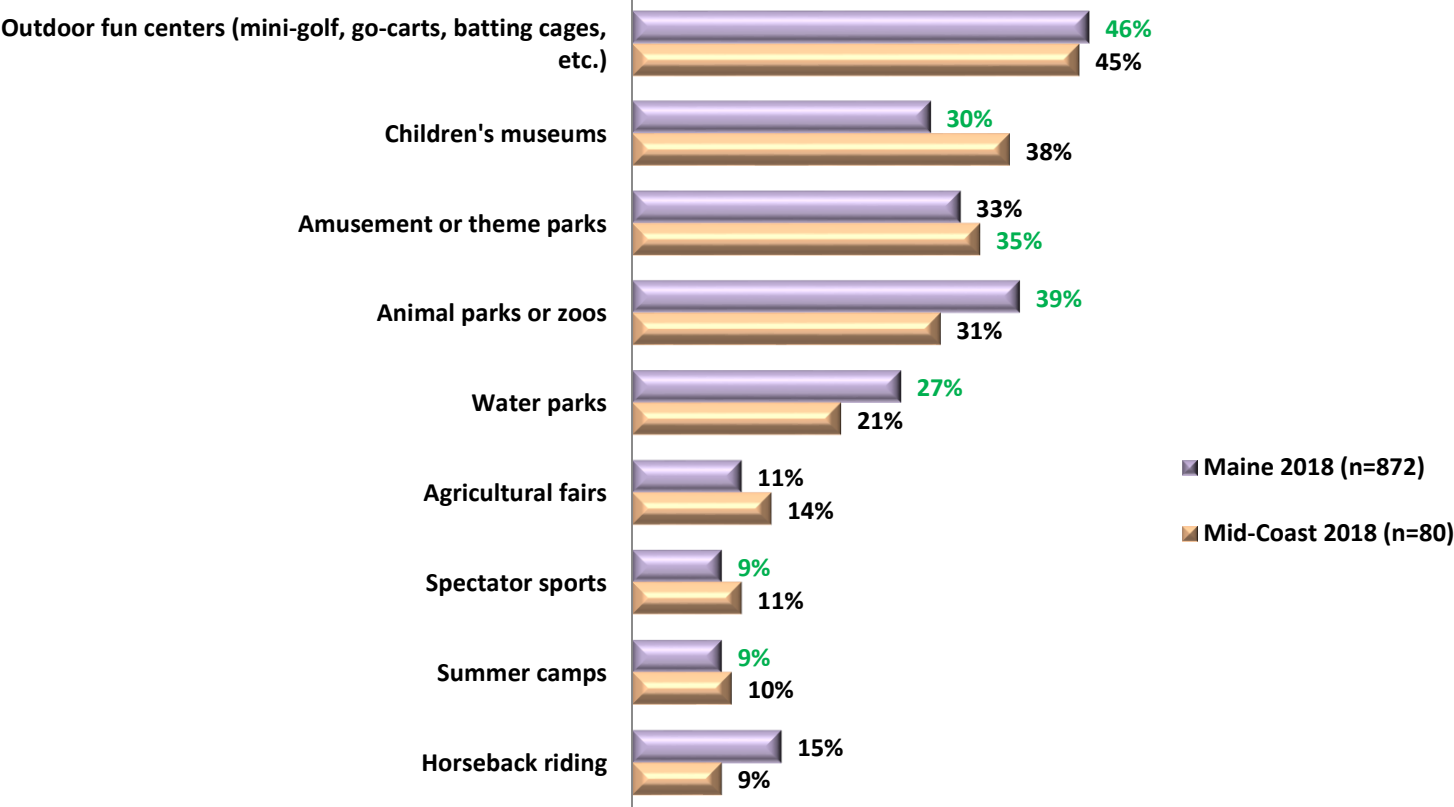
Shopping activities were relatively varied for those interested in the pursuit.



Outdoor fun centers topped the list for overnight visitors seeking family fun, with children’s museums, theme parks, and animal parks following closely behind.

FAMILY FUN/CHILDREN’S ACTIVITIES

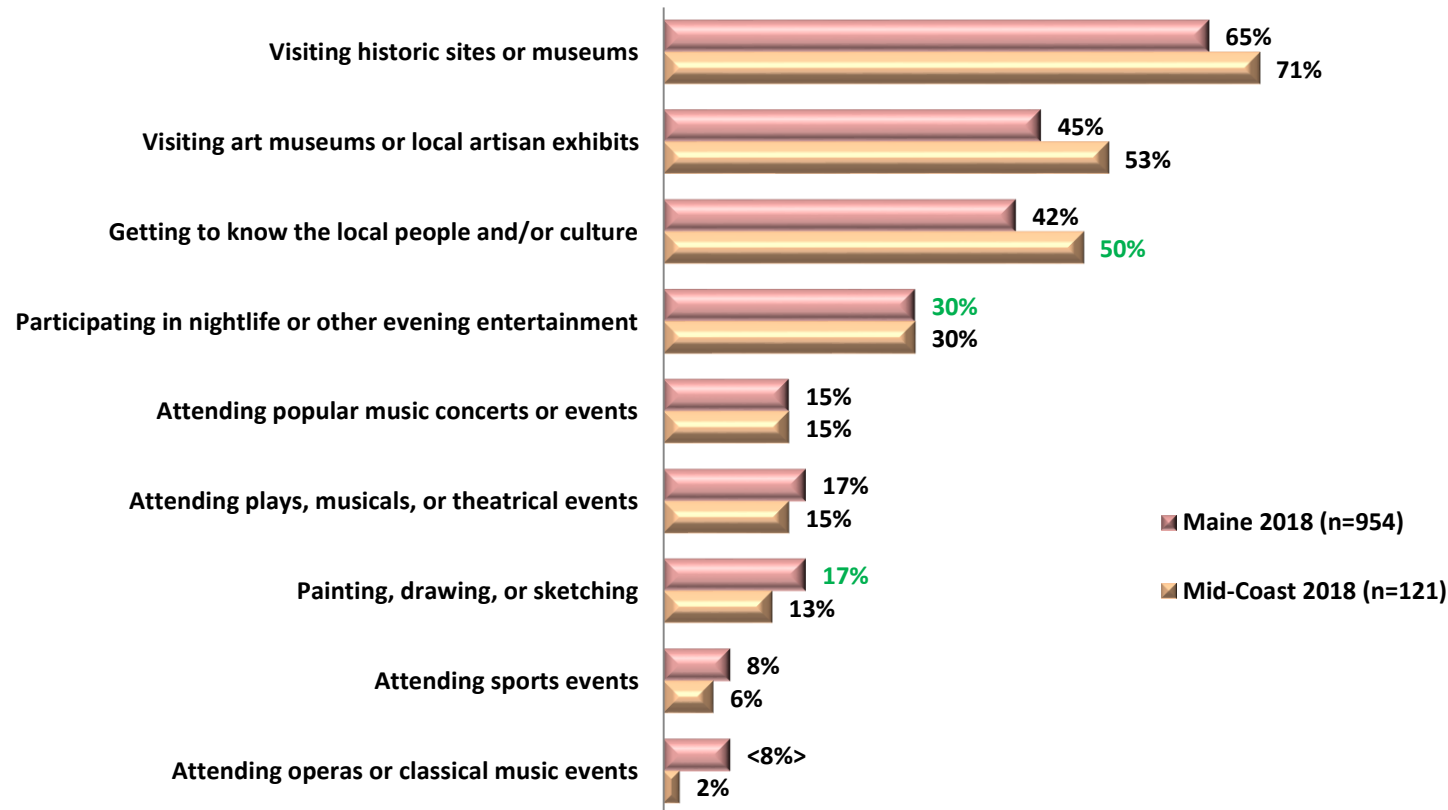
(Base: Those who report family fun/children’s activities as an interest area for their Maine trip)



Seven out of ten overnight visitors to the Mid-Coast who were interested in history/culture visited a historic site or museum. Roughly half went to an art exhibit or explored the local culture.

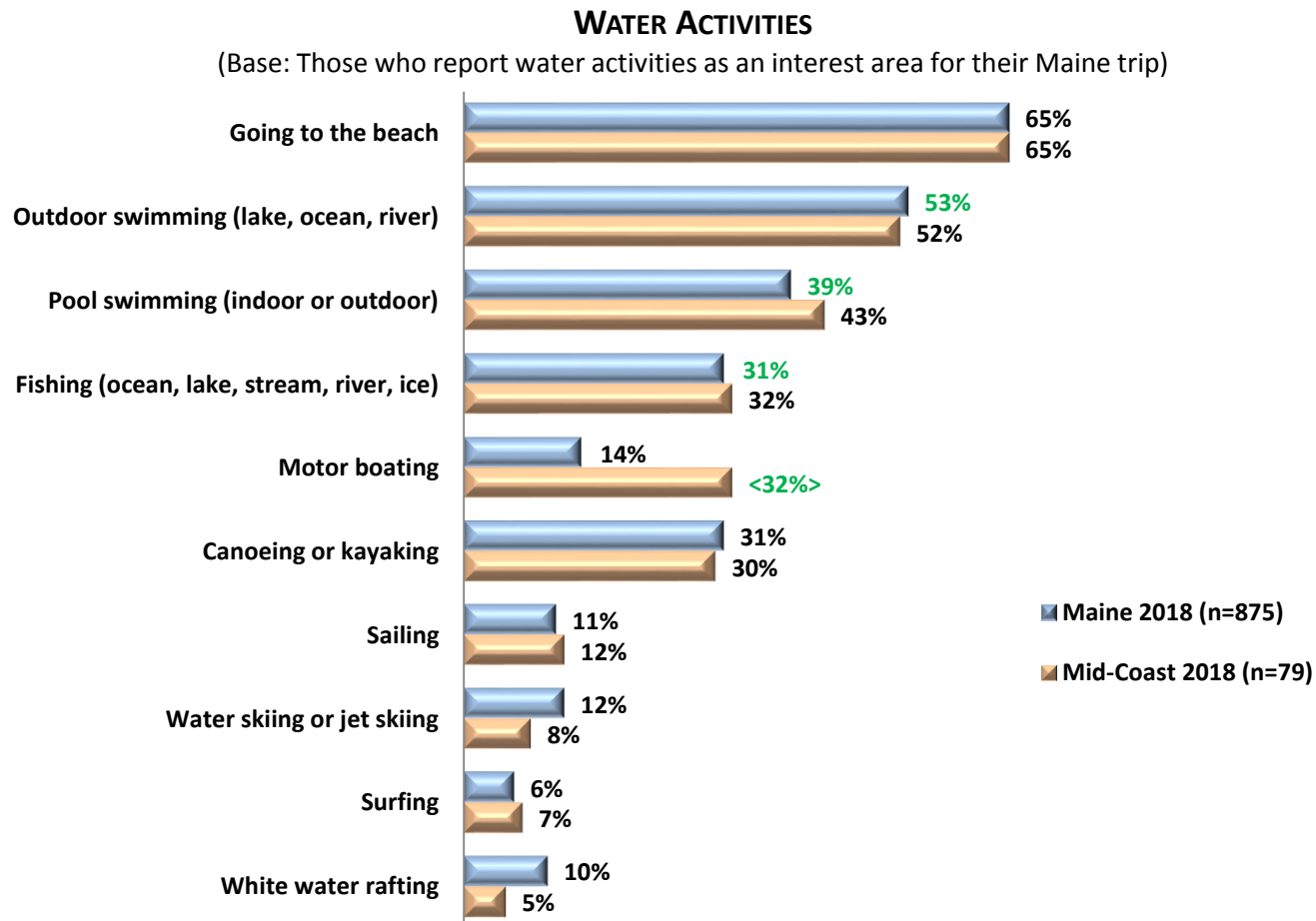
HISTORY OR CULTURE ACTIVITIES

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



Those who were interested in water activities in the Mid-Coast region engaged in a number of activities, most commonly going to the beach followed by swimming, fishing, motor boating, and canoeing or kayaking.

- Motor boating was more common among overnight visitors to the region than it was among visitors statewide.

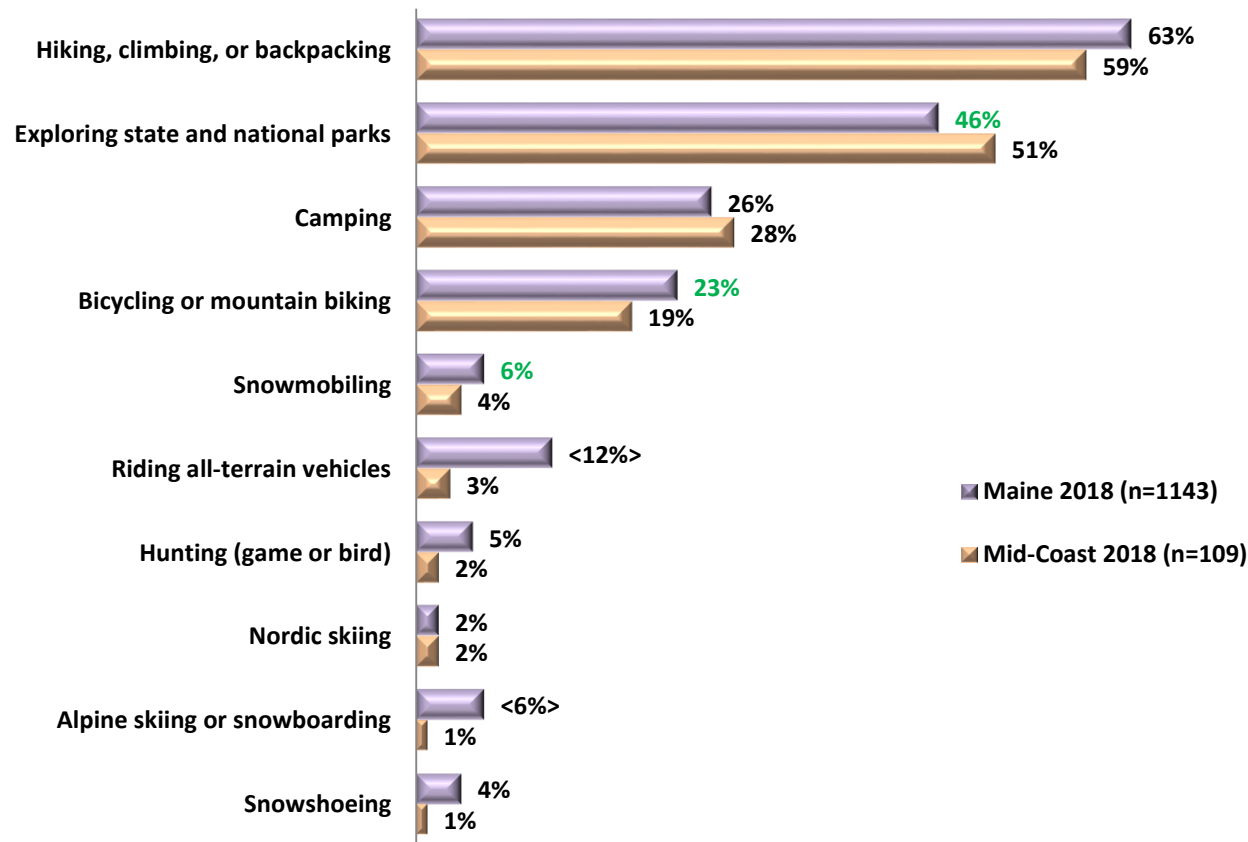


Hiking/climbing/backpacking and exploring national and state parks top the list of activities by overnight visitors to the Mid-Coast interested in active outdoor activities, similar to such travelers across the state.

- At the same time, riding all-terrain vehicles and alpine skiing were less common in the region.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

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



Boothbay Harbor was the most popular destination of overnight visitors to the Mid-Coast region in 2018, followed by the Maine State Aquarium and Camden Hills State Park.

% VISITING

TOP DESTINATIONS		LESS POPULAR DESTINATIONS*	
24%	Boothbay Harbor	9%	Coastal Maine Botanical Gardens
17%	Maine State Aquarium	8%	Maine Maritime Museum
17%	Camden Hills State Park	8%	Owls Head State Park
13%	Fort Knox	6%	Fort Popham
13%	Pemaquid Point Lighthouse	6%	Bowdoin College Museum of Art
13%	Moody's Diner	5%	Reid State Park
12%	Maine Lighthouse Museum	5%	Chocolate Church Arts Center
12%	Maine Beer Trail	5%	Maine Wine Trail
11%	Popham Beach	5%	Waldoboro's Historic Village
11%	Heritage Park	5%	Camden Snow Bowl
11%	Maine Lobster Festival	5%	Waldo Theatre
11%	Boothbay Railway Village	5%	Strand Theater

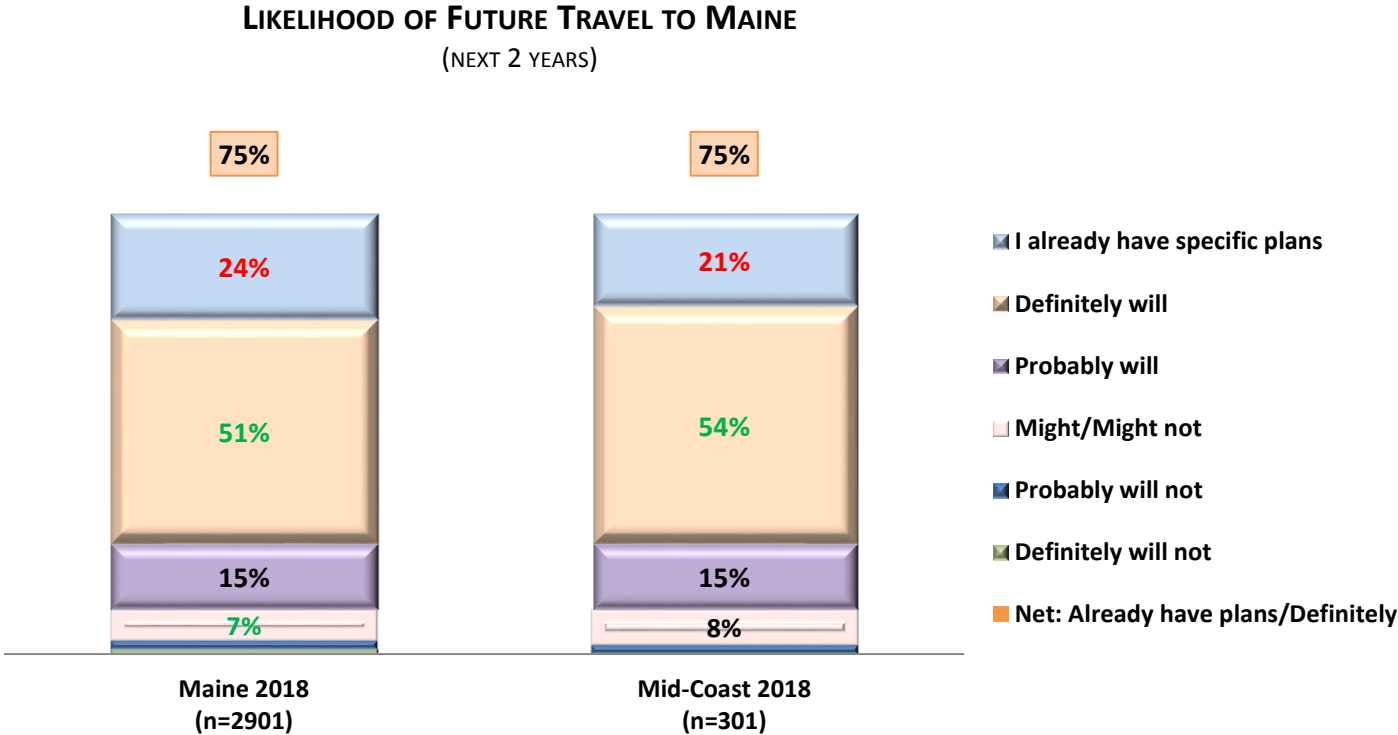
** Does not include options selected by fewer than 5% of visitors.*

(n=301)

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.

Three-quarters of the overnight visitors to the Mid-Coast region had either already made specific plans or will definitely return to Maine within 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 demographic profile of surveyed day visitors to the Mid-Coast region in 2018 was similar to that of day visitors statewide. The average age was 43, most were female, and roughly half were married.
- The average annual income for day visitors to the region was about \$75,000, and about four in ten were working full-time. About half had a college degree.

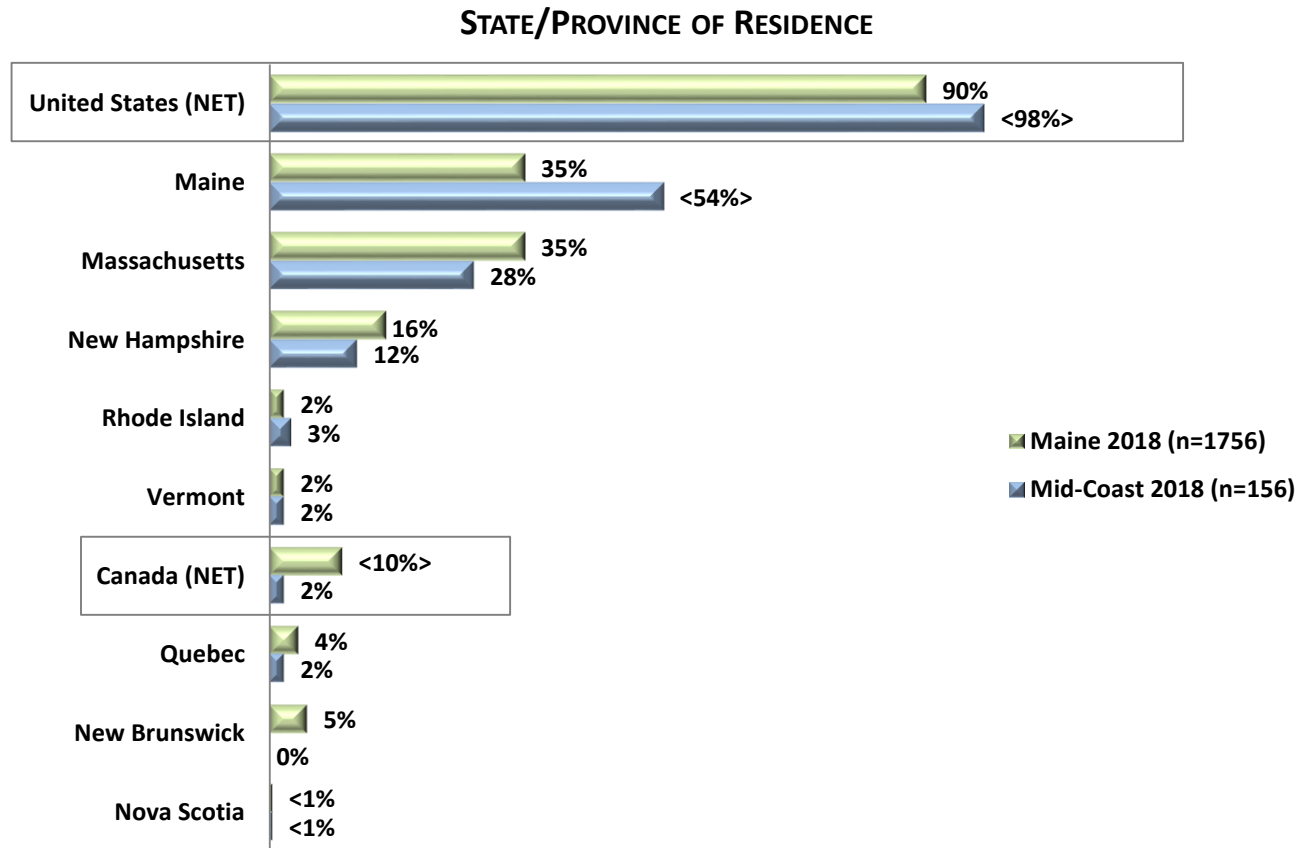
	Maine 2018 (n=1756)	Mid-Coast 2018 (n=156)
Age:		
< 35	37%	44%
35 - 44	18%	13%
45 - 54	16%	10%
55 +	28%	33%
Mean	43.0	43.0
Income:		
< \$50,000	38%	34%
\$50,000 - \$99,999	39%	47%
\$100,000 +	22%	20%
Mean	\$74,100	\$75,200
Female	78%	78%
College degree or higher	58%	54%
Married	49%	52%
Employed full-time	49%	41%

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Virtually all of the day visitors to the Mid-Coast were U.S. residents, including about half who were residents of Maine.

- Compared to travelers statewide, visitors to the Mid-Coast were more likely to be from Maine and less likely to be from Canada.

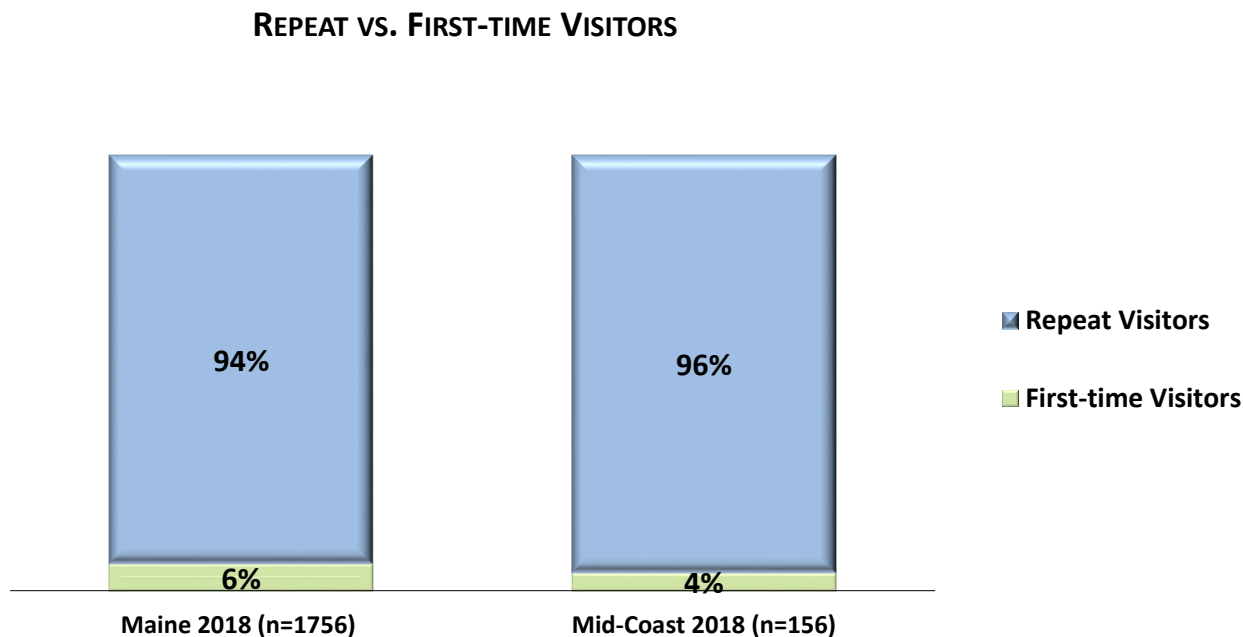


Q2. In what state or province do you reside?

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The vast majority of those visiting the Mid-Coast region for the day in 2018 had been to Maine before; very few were first-time visitors.



Q10. Was this your first trip to Maine?

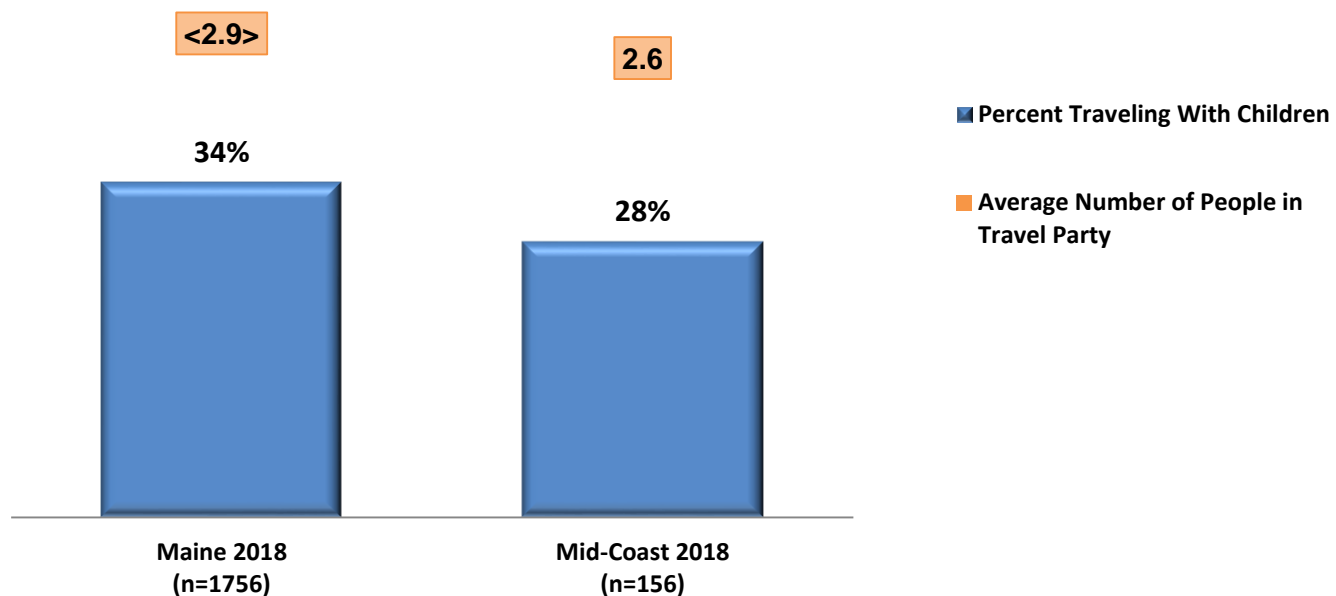
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The typical day traveler group in the region included between two and three people. About one in four travelled with children.

- Compared to travelers statewide, visitors to the Mid-Coast were traveling in smaller parties.

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

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

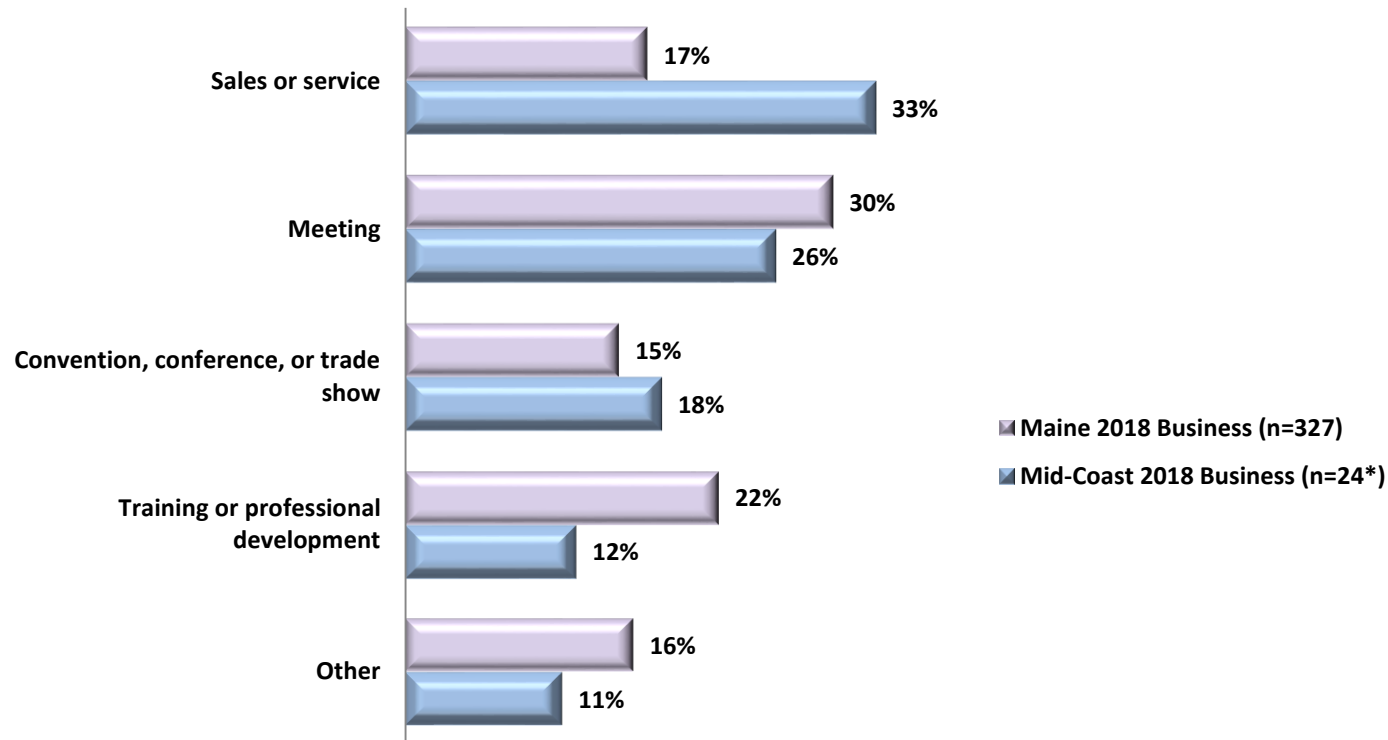
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Day Visitors: Trip Experience

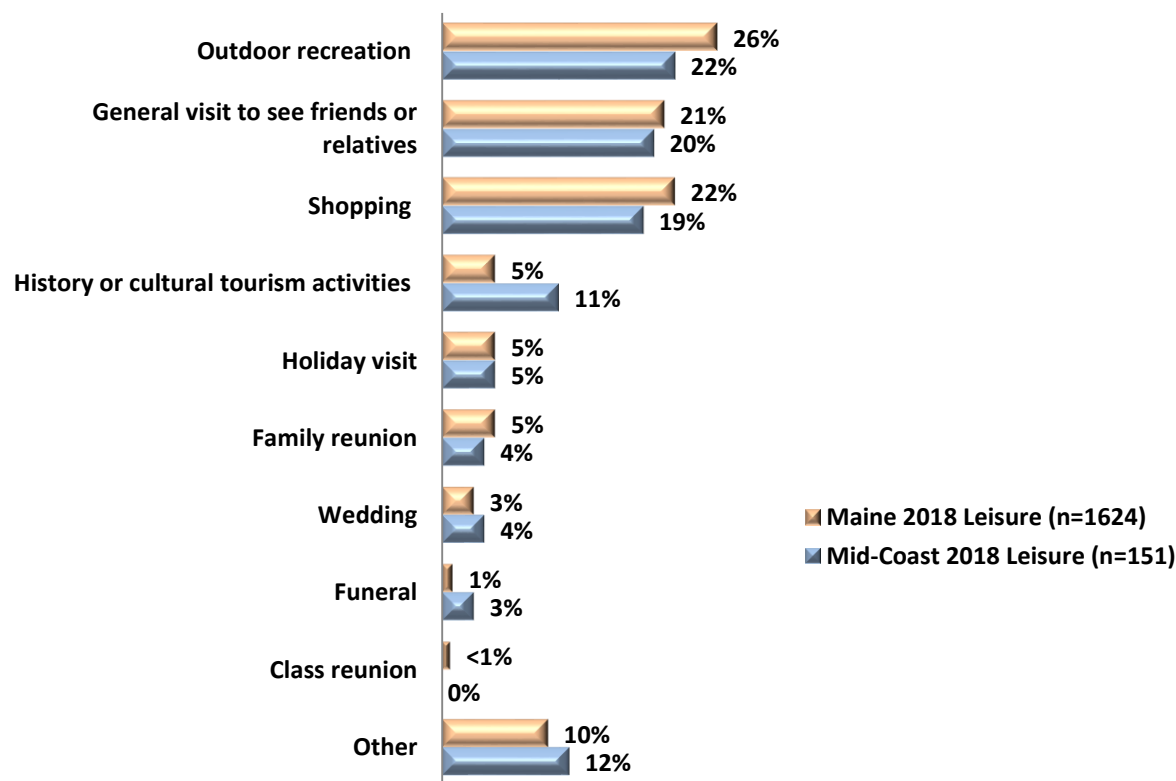
A variety of needs brought business visitors to the region for a day.

PRIMARY PURPOSE OF DAY BUSINESS TRIPS



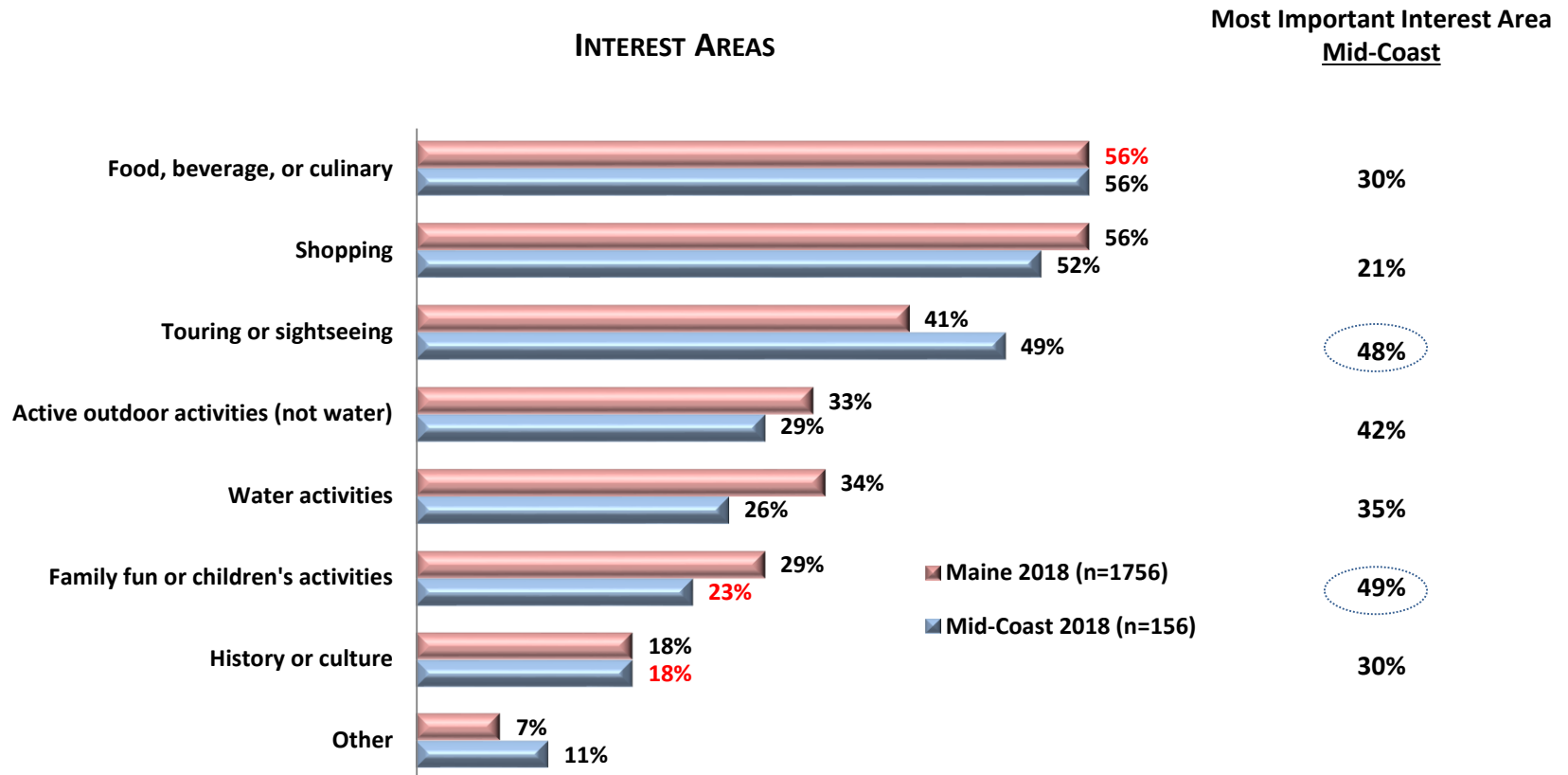
The most common leisure purposes for day trips to the region were outdoor recreation, visits to family or friends, and shopping.

PRIMARY PURPOSE OF DAY LEISURE TRIPS



Culinary activities, shopping, and sightseeing were the *most common* interest areas for day travelers to the region. Family fun and sightseeing activities were the most likely to be considered the *most important* area of interest.

➤ Interest in family fun (38%) and history/culture (34%) dipped from 2017.



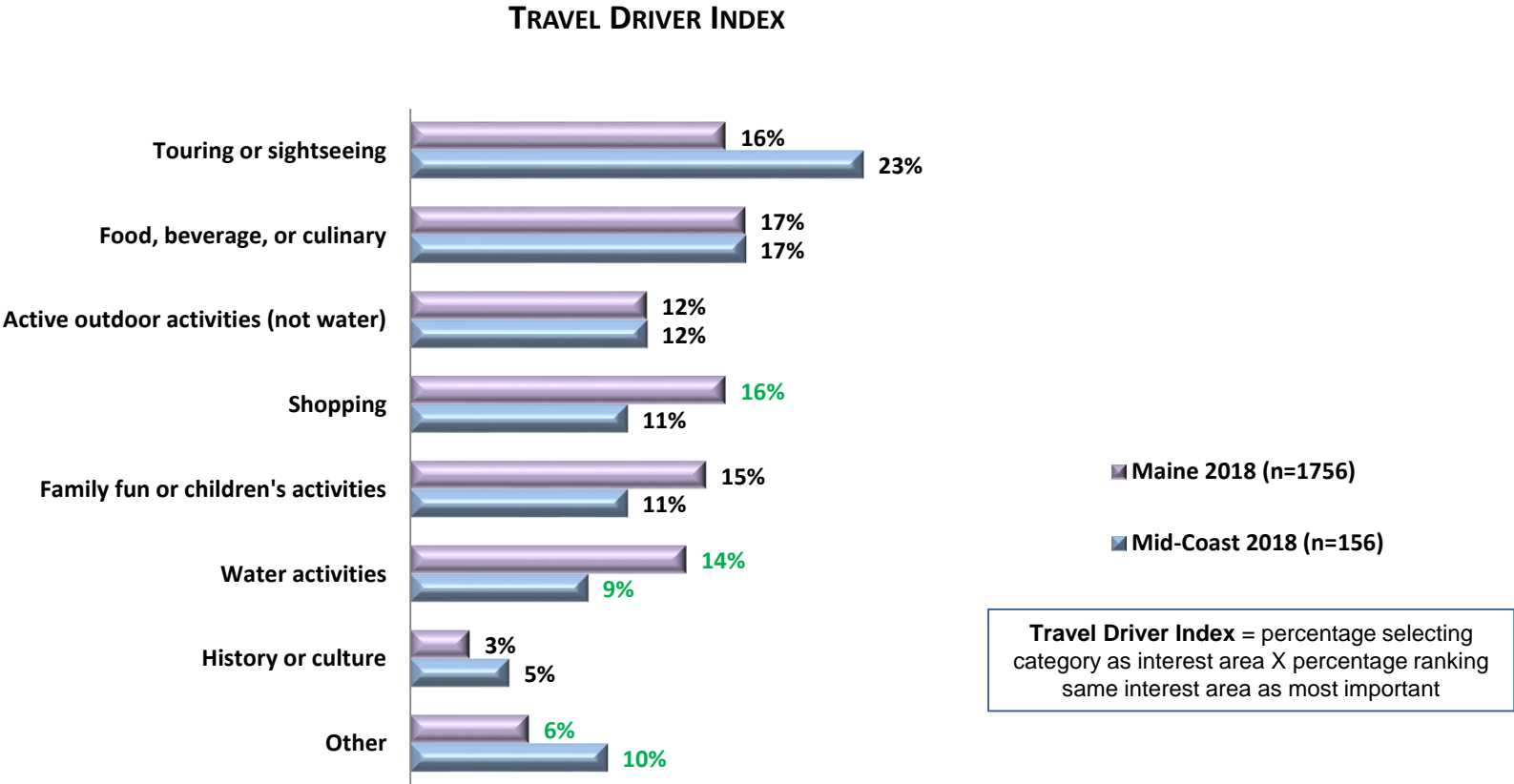
Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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.

<> 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.

Calculated to combine interest and importance measures, the Travel Driver Index indicates that touring/sightseeing was the most influential driver of day visits to the Mid-Coast region in 2018, followed by food and beverages.

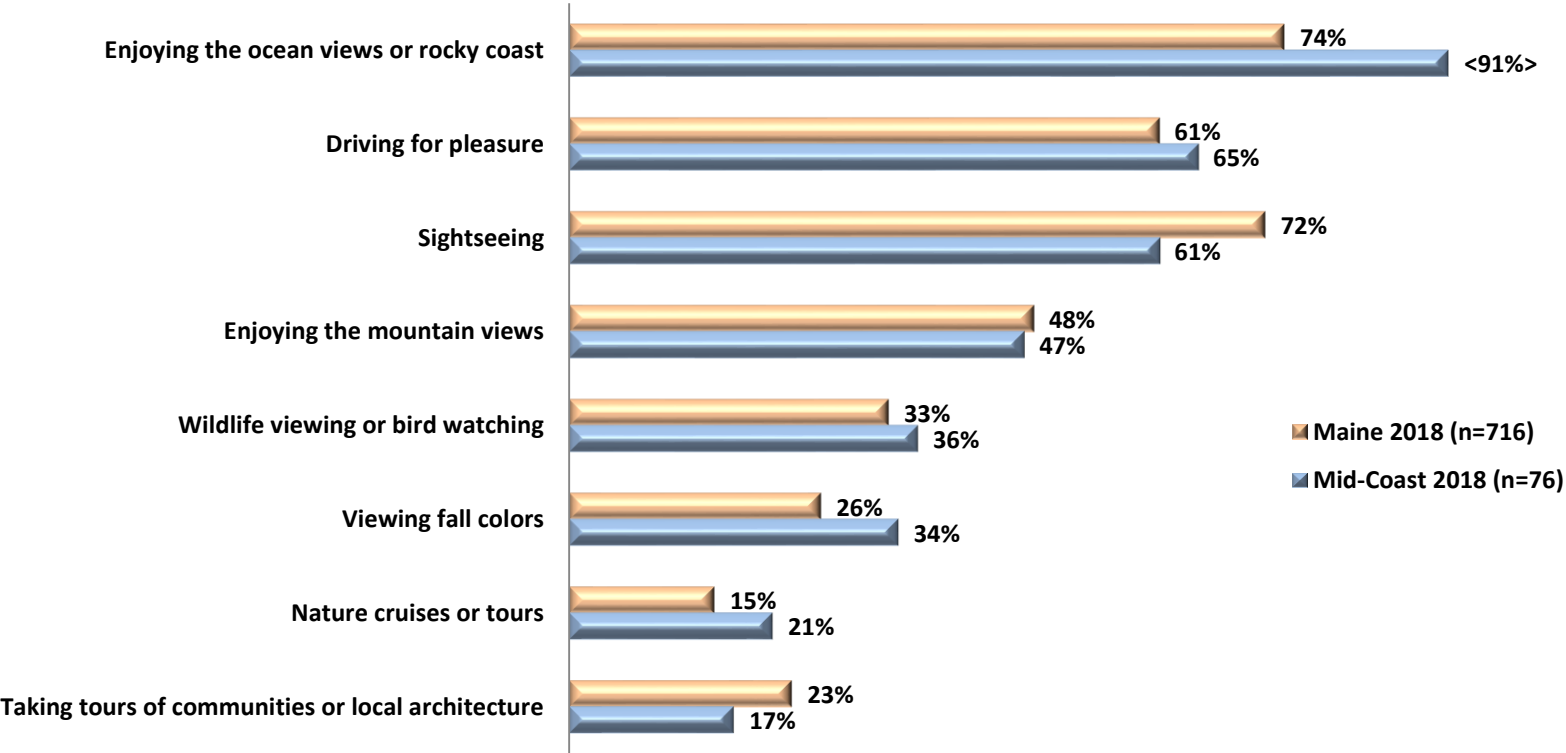


Almost all Mid-Coast day visitors interested in sightseeing enjoyed the ocean views. At least six out of ten went for a pleasure drive or went sightseeing generally.

- Enjoyment of the ocean/coastal views was significantly more common among day trippers to the region than among visitors statewide.

TOURING OR SIGHTSEEING ACTIVITIES

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

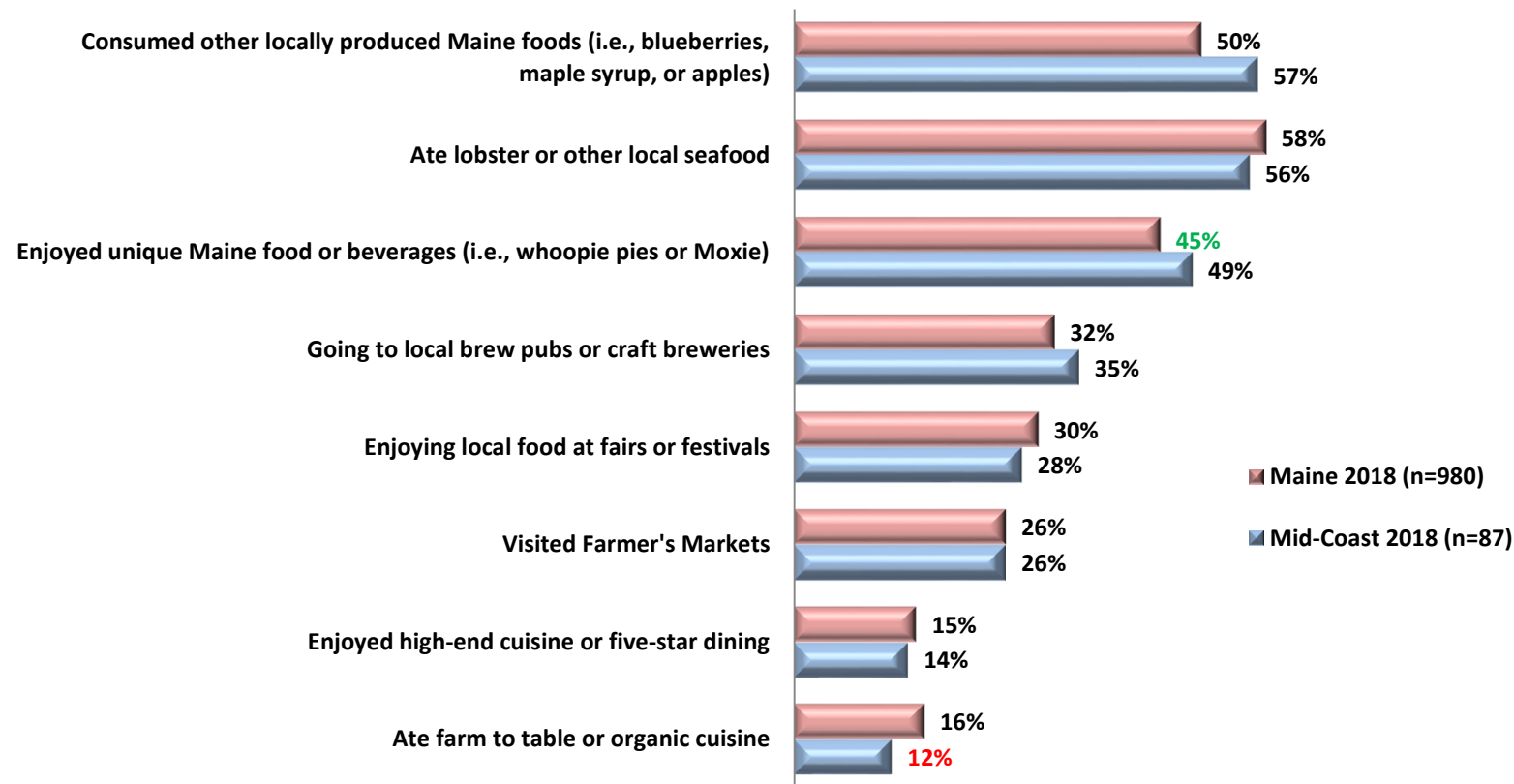


Among day visitors interested in cuisine, half or more enjoyed local seafood or other Maine fare, or consumed other unique Maine foods.

- The proportion eating farm to table or organic cuisine while visiting the Mid-Coast for the day in 2018 (12%) was lower than it was in the previous year (26%).

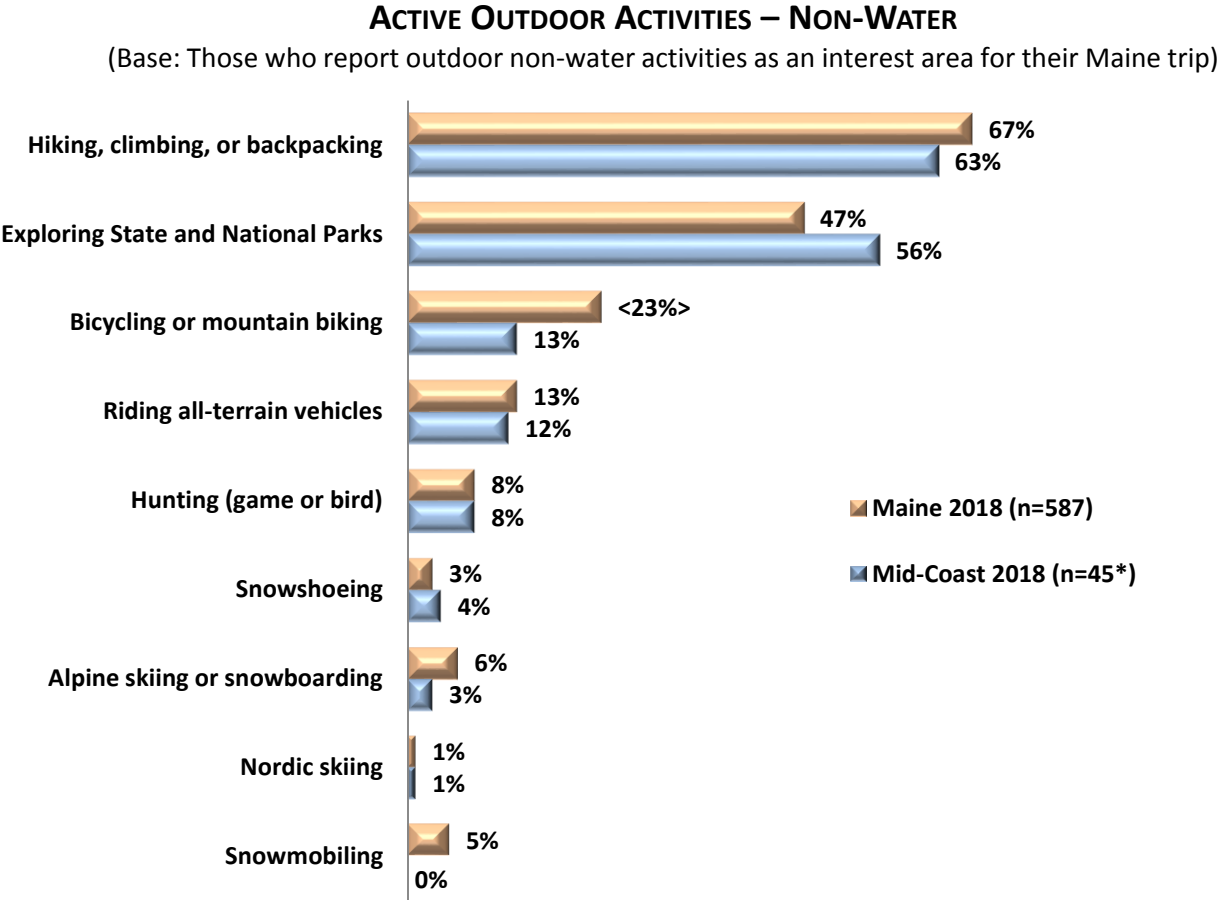
FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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



For day trippers in the region, the most common active outdoor activities included hiking and exploring state or national parks – similar to day visitors across the state.

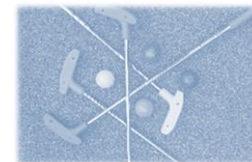
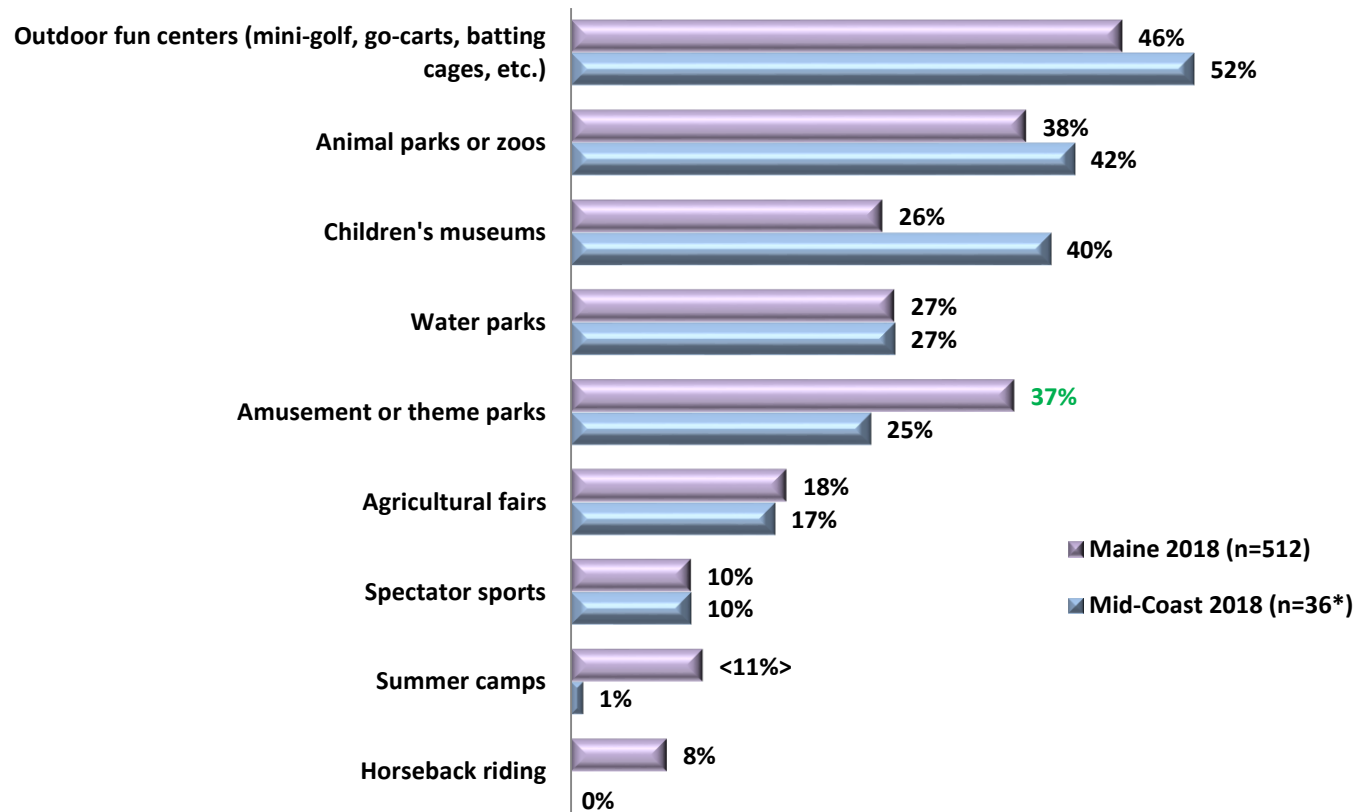
- Biking was less common among visitors to the region than it was among those statewide.



Among day trippers to the region seeking family fun, outdoor fun centers, animal parks/zoos, and children's museums were the most common activities.

FAMILY FUN/CHILDREN'S ACTIVITIES

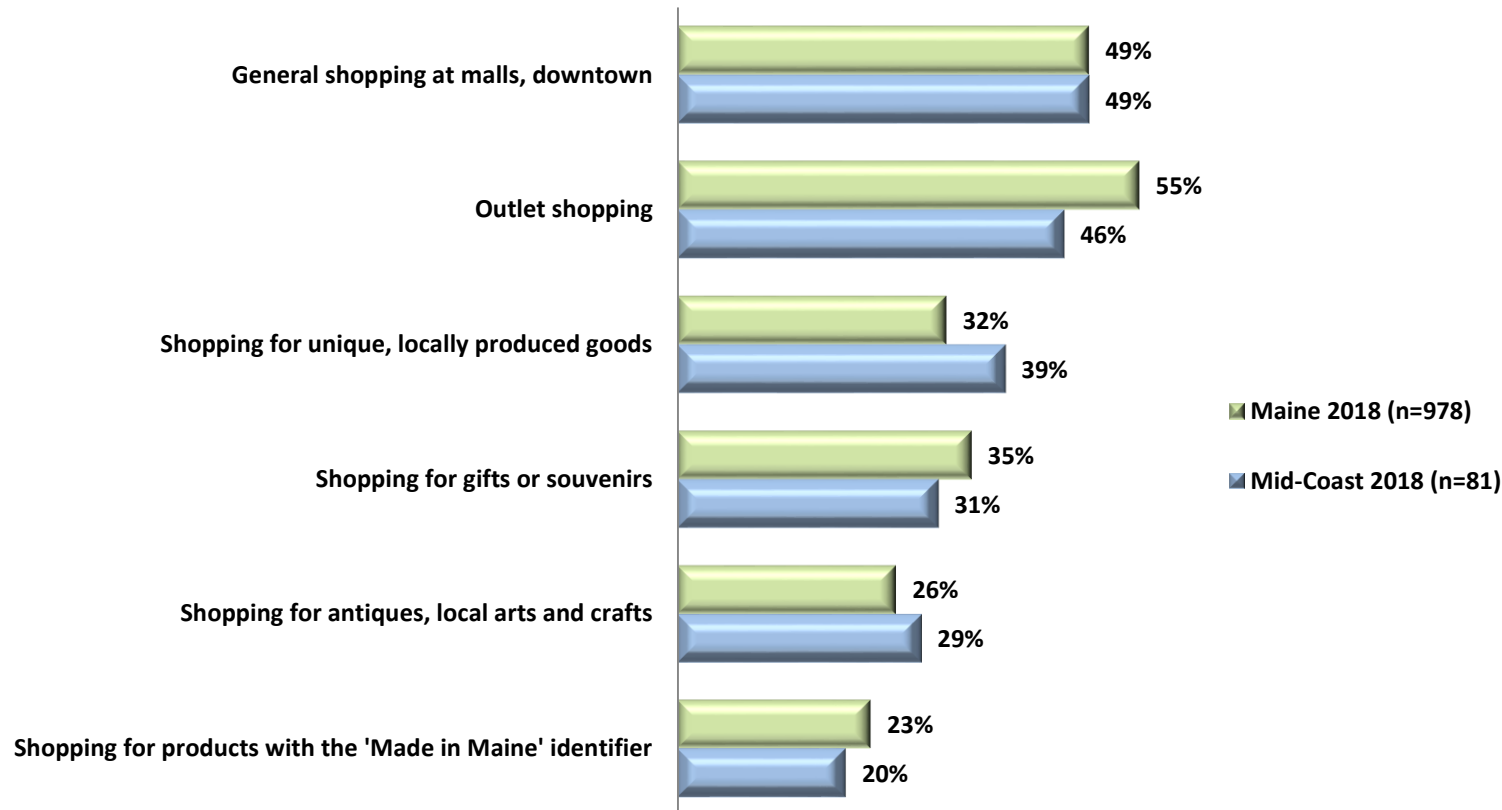
(Base: Those who report family fun/children's activities as an interest area for their Maine trip)



Those visiting the Mid-Coast for the day were most likely to shop at malls/downtown or at outlets, although a variety of other types and locations of shopping were relatively common as well.

SHOPPING ACTIVITIES

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



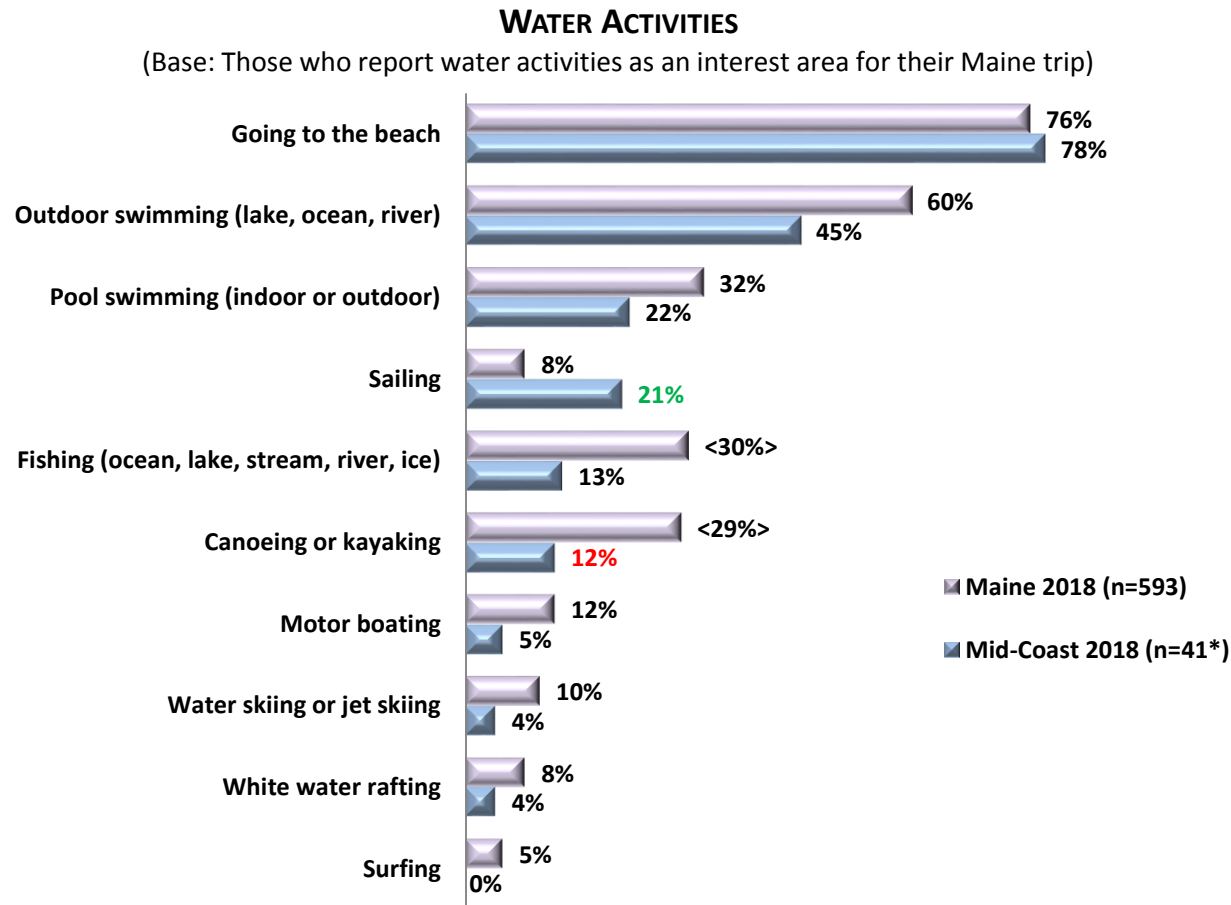
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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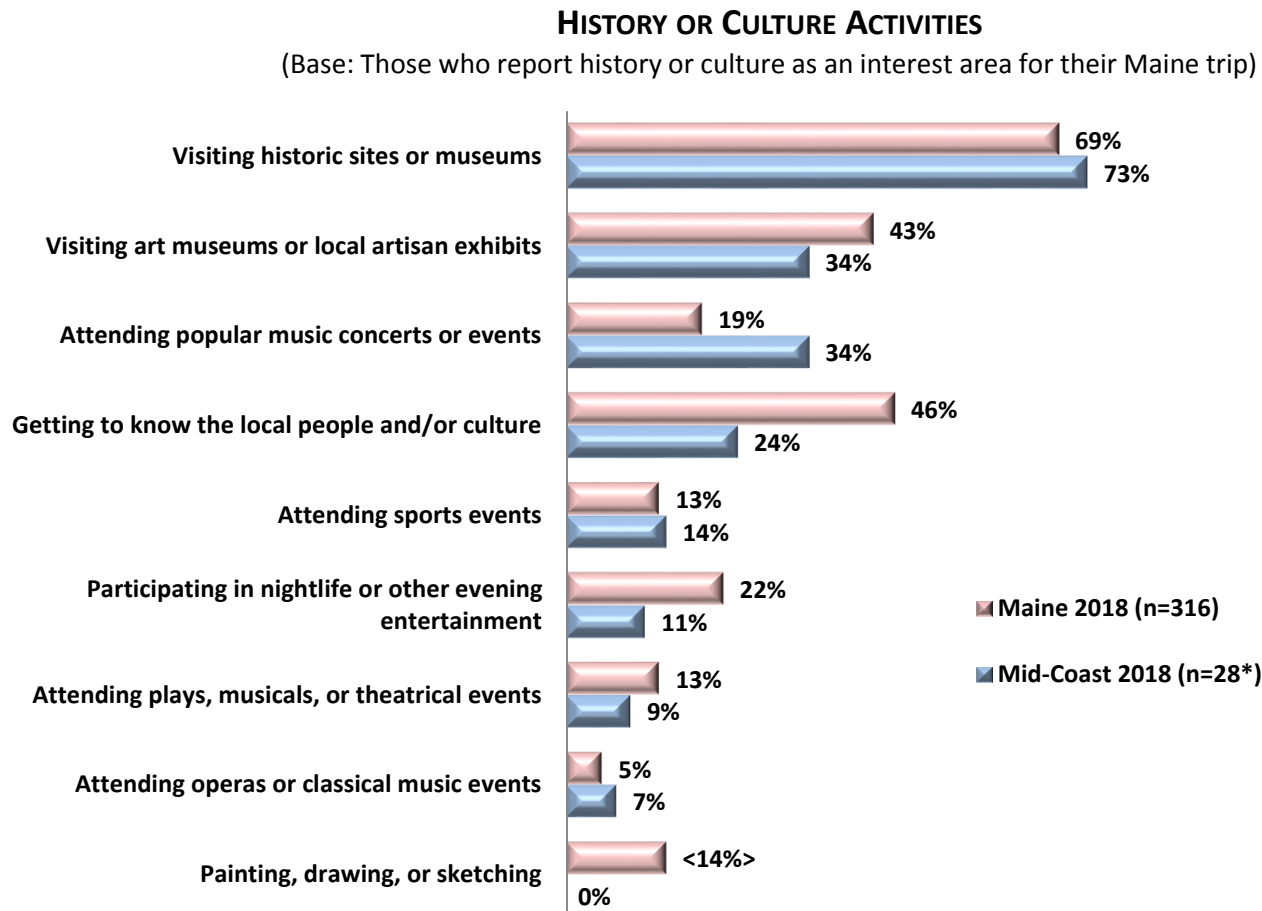
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Eight out of ten travelers visiting the Mid-Coast for the day who were interested in water activities went to a beach. Almost half swam outside.

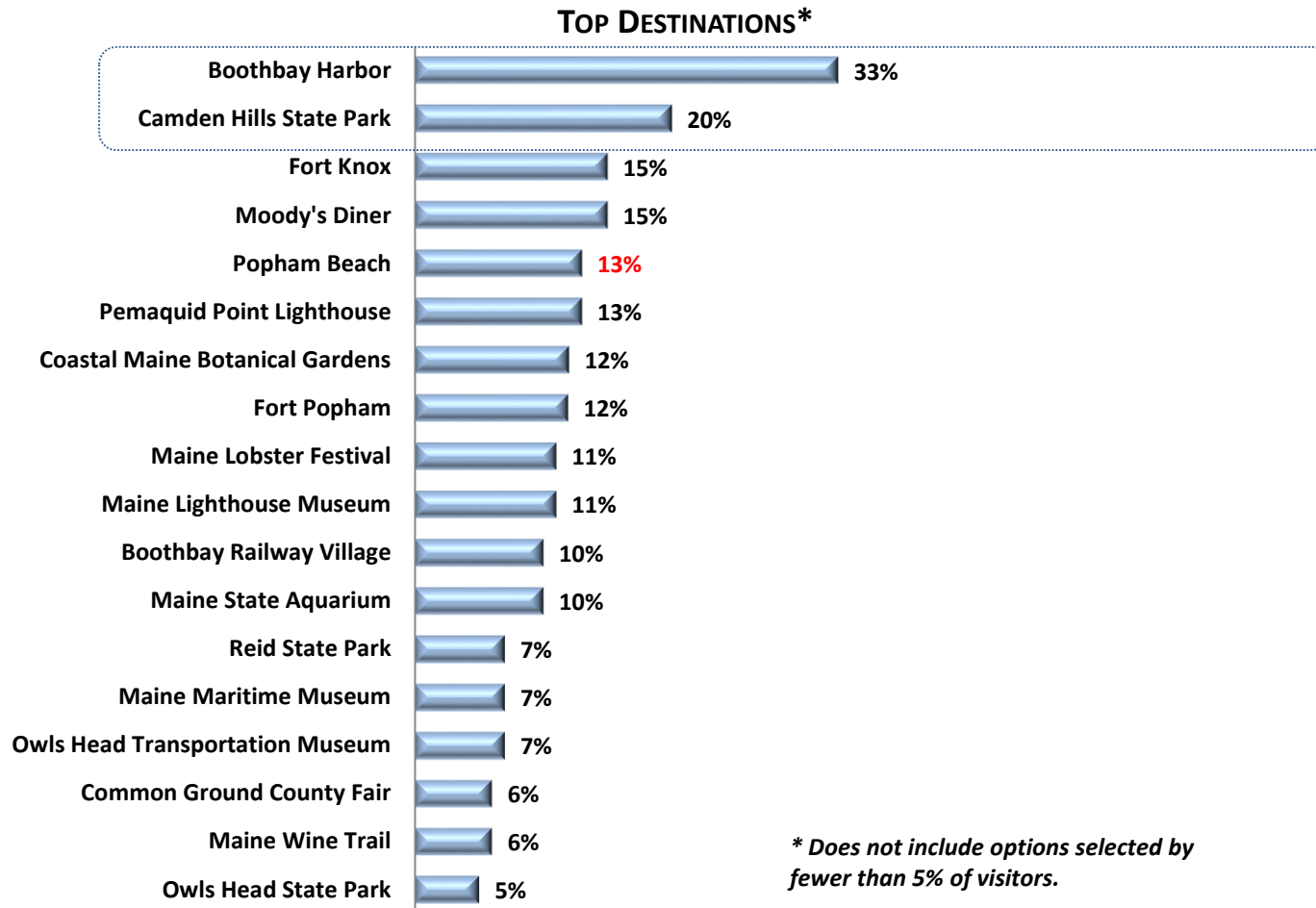
- Canoeing and kayaking were less common in the region than statewide, and became much less common between 2017 and 2018 (falling from 58% to 12%).
- On the other hand, sailing was much more popular in 2018 (21%) than in 2017 (1%).



The most common cultural activity for regional day visitors was going to historic sites or museums, though visiting art exhibits, attending music performances, and getting to know the local culture were also relatively popular.

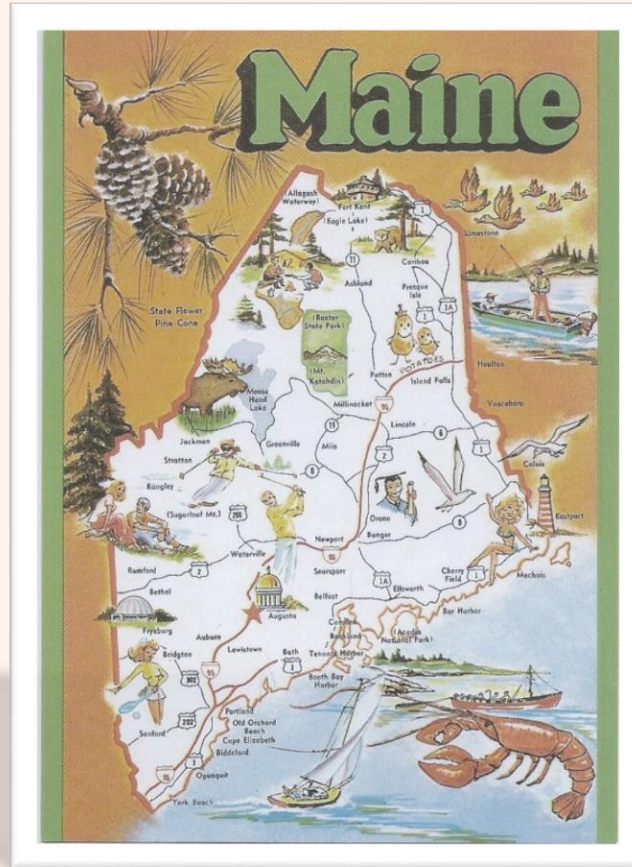


Boothbay Harbor was the top destination for daytime visitors to the Mid-Coast region, followed by Camden Hills State Park.



(n=156)

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.

Research Objectives:	Survey Instruments		
	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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