

# MAINE OFFICE OF TOURISM EMOTIONAL POSITIONING & MARKET PERCEPTION STUDY OF CANADIAN VISITORS REPORT

Erin Dinkel, M.S.

Director of Research, Downs & St. Germain Research

September 2023

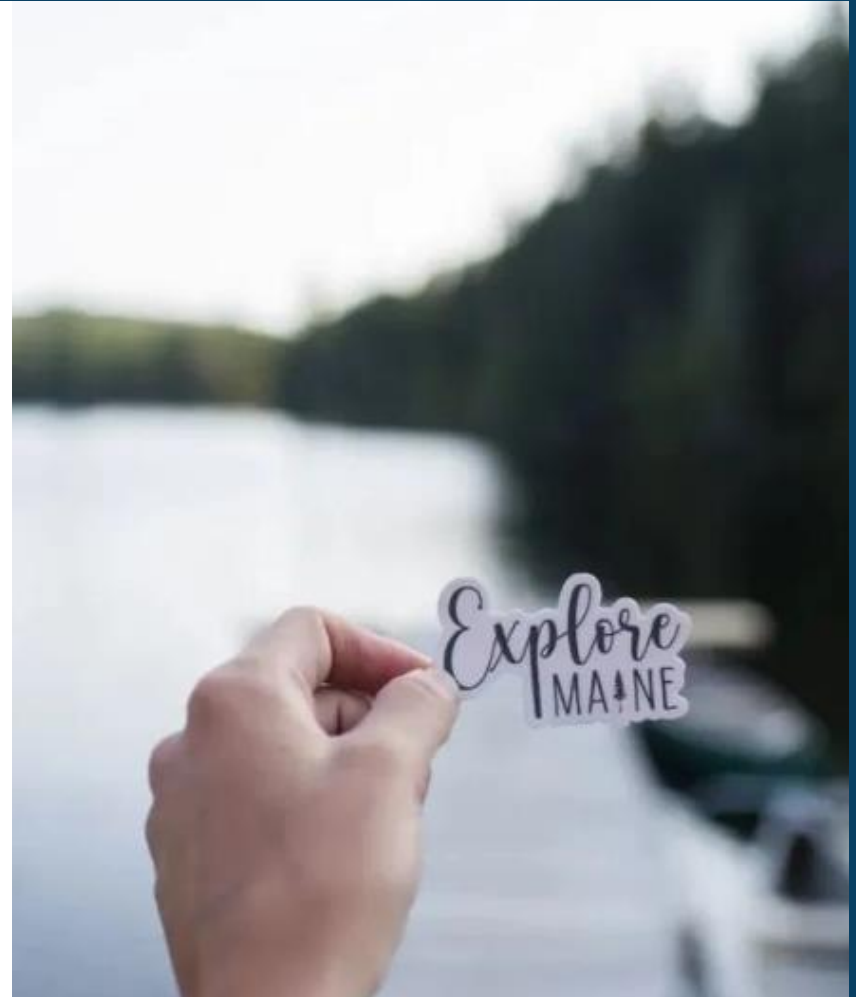
# METHODOLOGY.

# STUDY PURPOSE

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## Study Purpose

- The purpose of this study is to better understand Canadians' views of Maine as a vacation destination.
- There were two phases to this research: 1) Qualitative, and 2) Quantitative.
- The **qualitative phase** was designed to explore Canadians' emotional reactions to elements of Maine as a vacation destination.
- The **quantitative phase** was designed to develop an overview of Canadian visitors and their perceptions of Maine as a vacation destination.



# STUDY PURPOSE & RESEARCH METHODS

## Research Methods

### Qualitative Phase:

- 6 focus groups: 2 in Toronto, 2 in Montréal, 2 in Québec
- Focus Group participants met the following specifications:
  - Visited Maine in the last 5 years
  - Vacation decision maker
  - Age 25-64
  - Household income above \$60,000
  - Mix of gender and race/ethnicity

### Qualitative Phase:

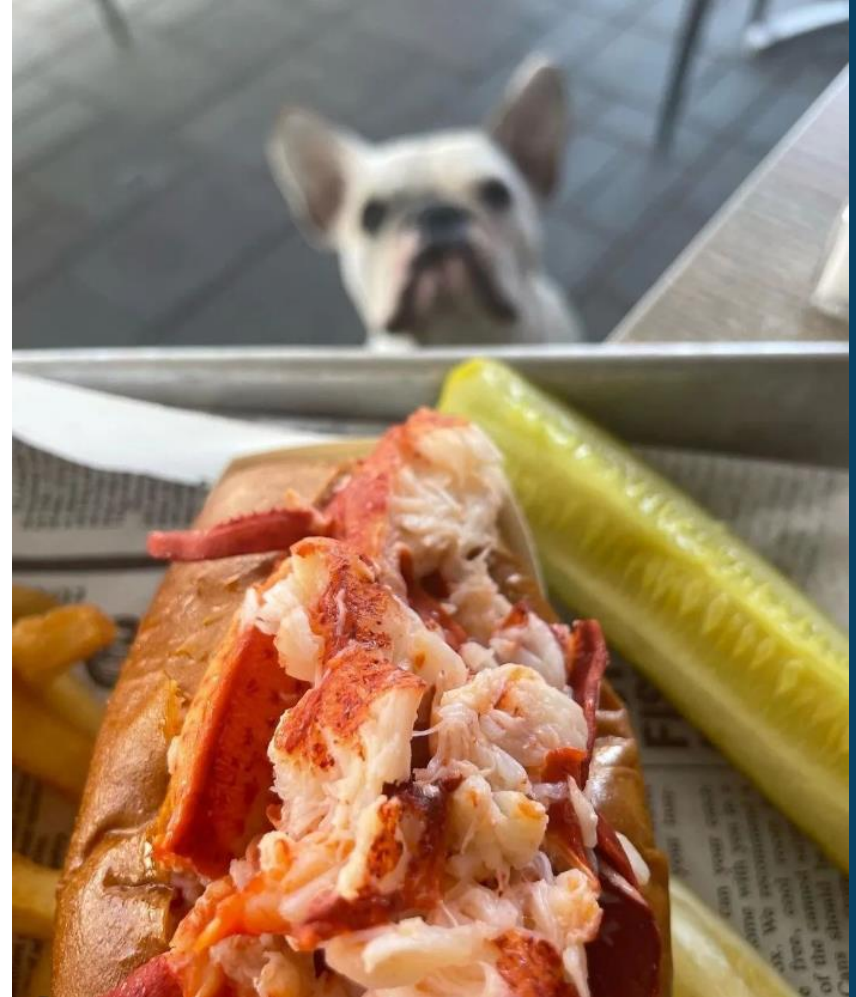
- Data were collected June 14th – 21st, 2023 through online surveys with 665 consumers in:
  - Québec - 261
  - Ontario - 248
  - Maritime Provinces (Nova Scotia, New Brunswick, Newfoundland, Prince Edward Island) - 156
- Consumers were those who had an annual household income of \$75,000 and above, had taken at least vacation and stayed overnight in paid accommodations in the past 3 years, and had some influence or were the key household vacation decision-makers.

# KEY TAKEAWAYS.

# DIFFERENCES BETWEEN U.S. & CANADIAN VISITORS TO MAINE (2022)

From 2022 Canadian Visitor Tracking, Canadian visitors are more likely than domestic visitors to:

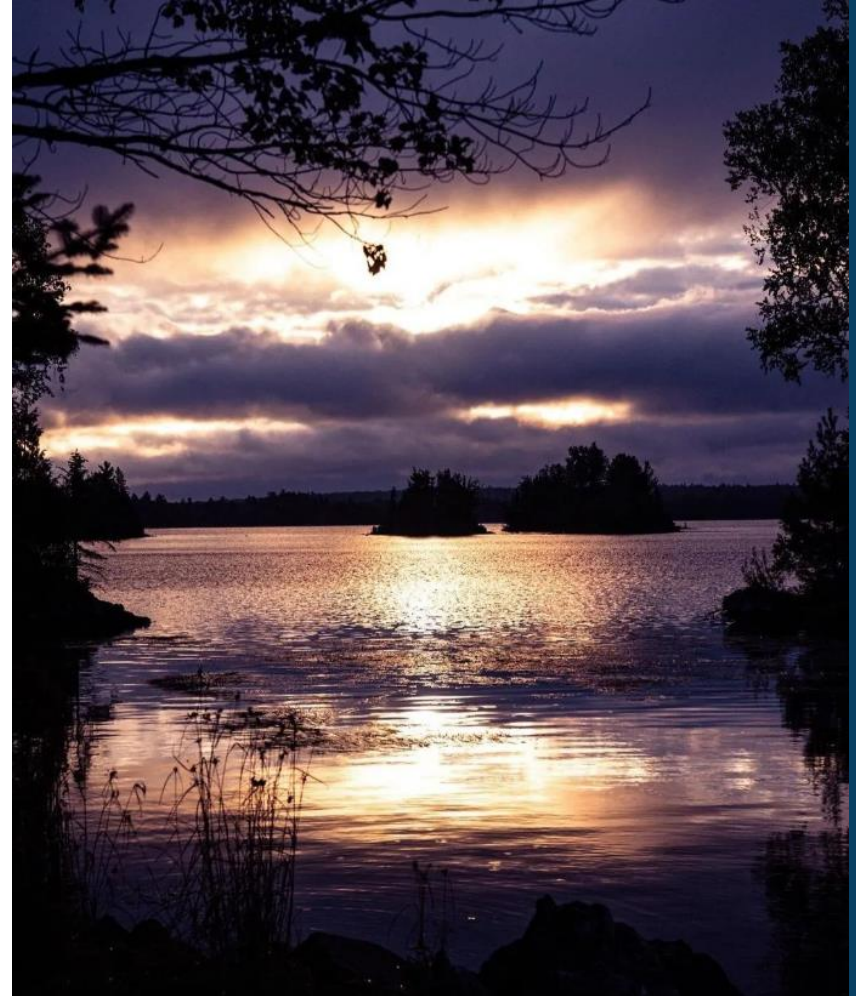
- Use online resources to plan their trip, especially VisitMaine.com
- Come to Maine to go to the beach
- Stay in hotels, motels, and resorts
- Use online travel agencies to book their accommodations
- Use navigation apps and go to visitor information centers when in Maine
- Engage in touring/sightseeing and water activities
  - Less active outdoor activities (Toronto residents the likely exception here based on focus group results)



# TAKEAWAY #1: JUST ADD WATER

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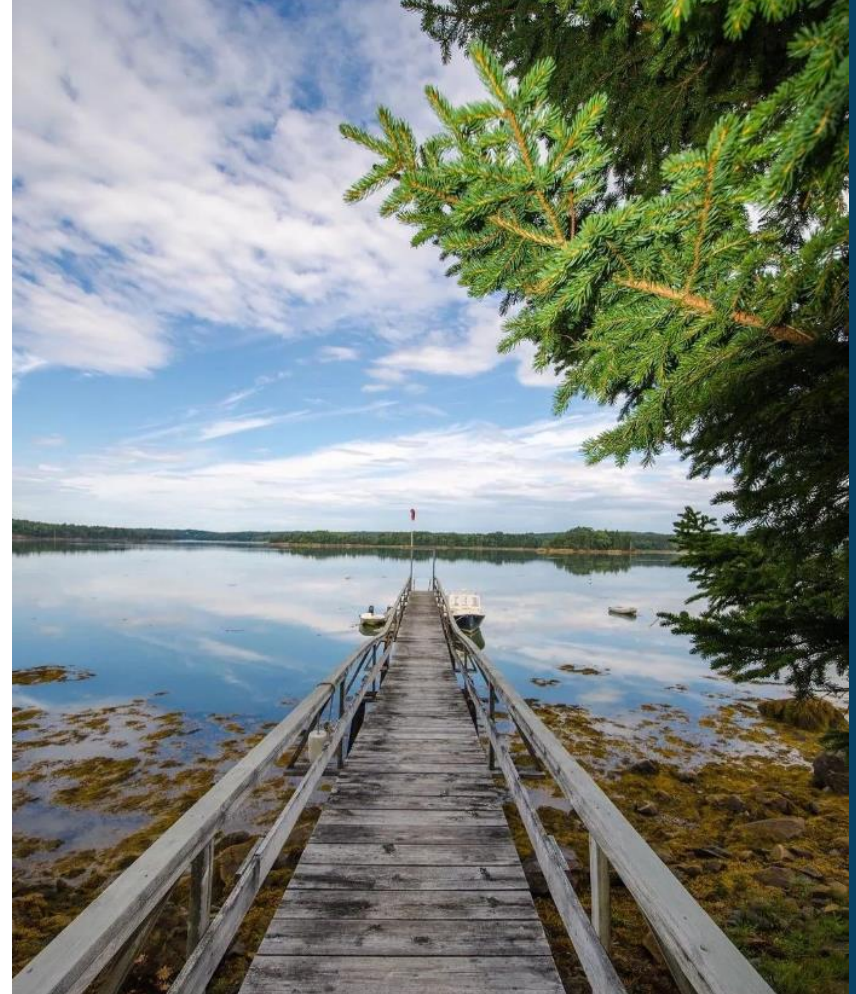
- Overall, for Canadians, Maine as a vacation destination revolves around the coast, delicious seafood, convenience, a slower pace, natural attractions, and a relaxed, nostalgic, and friendly ambiance set in authentic (non-commercial) cities, towns, and villages
  - That said, **beaches, coastline, and the ocean are more important for Canadian visitors**, particularly Québec residents
- Ratings of Maine's coastal environments was tied as the top-rated vacation element of a Maine vacation (except for residents from the Maritimes who have coastal elements in their province)
- The water resonates with visitors and differentiates from other New England states and many Canadian provinces



# TAKEAWAY #1: JUST ADD WATER

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- When water imaging doesn't resonate as strongly, it generally is because it could be on a lake or river as opposed to the ocean
  - This is important, particularly for Québec residents, as many can find natural wilderness settings near their own home
- This finding aligns with the 2022 Maine Visitor Tracking Study data as Canadian visitors were more likely to engage in water activities than domestic visitors
- That said, Toronto residents were more similar to visitors from New York and Boston in that they appreciated how Maine is a welcome retreat from the concrete jungle where they live and work





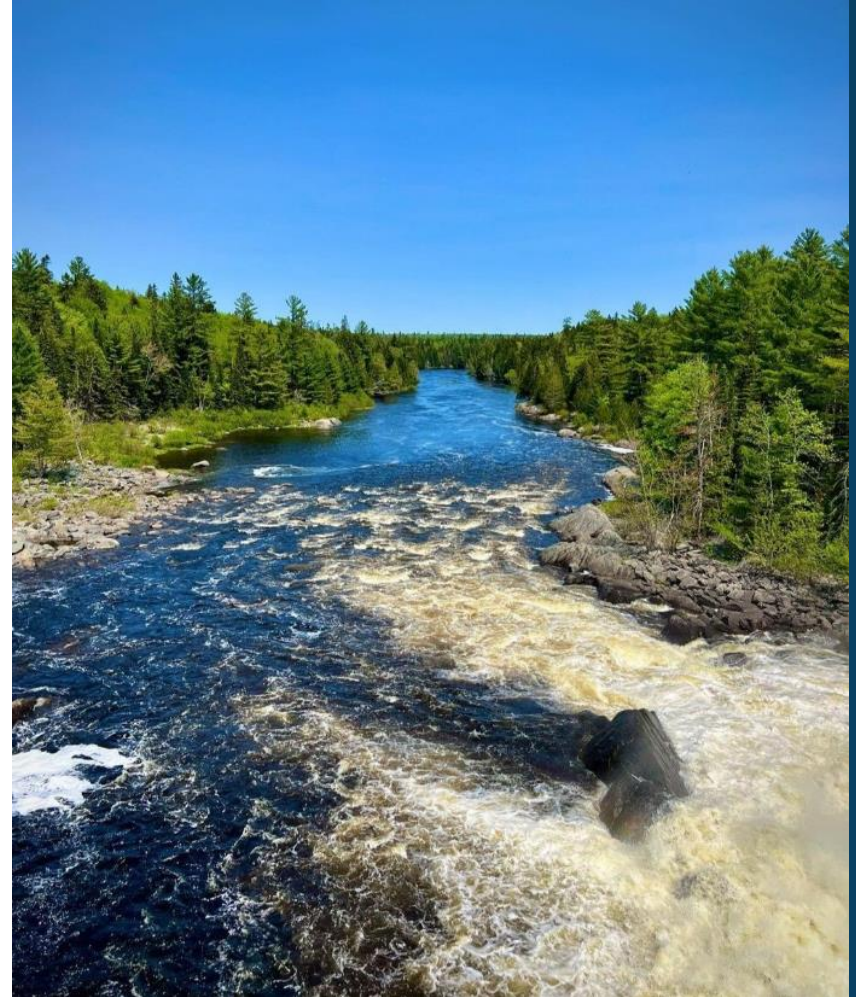
## REPRESENTATIVE QUOTE:

“Maine, for me, the ocean is capital importance, and closeness and accessibility. It's not complicated. I mean, it's a low-key dress down feeling there's no black tie required or special events, no tuxedo, just come as you are and no pretension living at home. Leave your problems at home. Come and relax by the sea and good feelings.”

# TAKEAWAY #2: RELAXATION

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- Like domestic visitors, **the top emotions felt by Canadian visitors to Maine are relaxation and peace**
- More than 2 in 3 Canadian residents believe Maine to be a serene retreat where one can unwind and take a more laid-back approach (vs. being a vibrant getaway with a wide range of activities)
- Canadians appreciate the slower pace of Maine which significantly increases the ability to relax
- The sense of adventure reported by other Maine visitors are less prevalent among Canadian visitors, particularly those from Québec



## REPRESENTATIVE QUOTE:

“There's a sense of coziness. I mean, you get there, you still got that tension in you from the city, whether you're coming from Montréal or elsewhere. And it'll take a day or two to sort of ease into the vibe. But the coziness, they've got an uncomplicated lifestyle that you can't help but sort of adhere to, because whether it be the pâtisserie (pastry shop) or the cafe they've got this small community vibe, and everybody knows each other's names.”

# TAKEAWAY #3: MAINE IS CLOSE, BUT AWAY

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- Maine is convenient and familiar, but also foreign to Canadian residents
- **Canadians appreciate that Mainers have a similar authentic, welcoming, proud, and laid-back personality while also getting an opportunity to visit a different country**
- One of the unique characteristics of Maine are the people and the lifestyle
  - The kind and welcoming people of Maine are a larger part of the Maine experience for Canadian visitors compared to domestic visitors
  - Canadians like the slower pace and old world feel of Maine (still doing things the old ways in some areas)
  - Friendly locals were tied for second (behind safety) as top-rated characteristics



## REPRESENTATIVE QUOTES:

“That there's a small town feeling and well they have the same values as our local towns, as smaller towns in Québec. It's still nice to feel like you're a little further away with the currency and the language.”

“What's special to me it's kind of close. You can jump in the car and go for a long weekend like Labor Day weekend. It's very easy, and you still have the feeling of traveling because you still have to bring your passport for the border. It's close, but you still feel like it's international.”

# TAKEAWAY #4: DECISION FACTORS

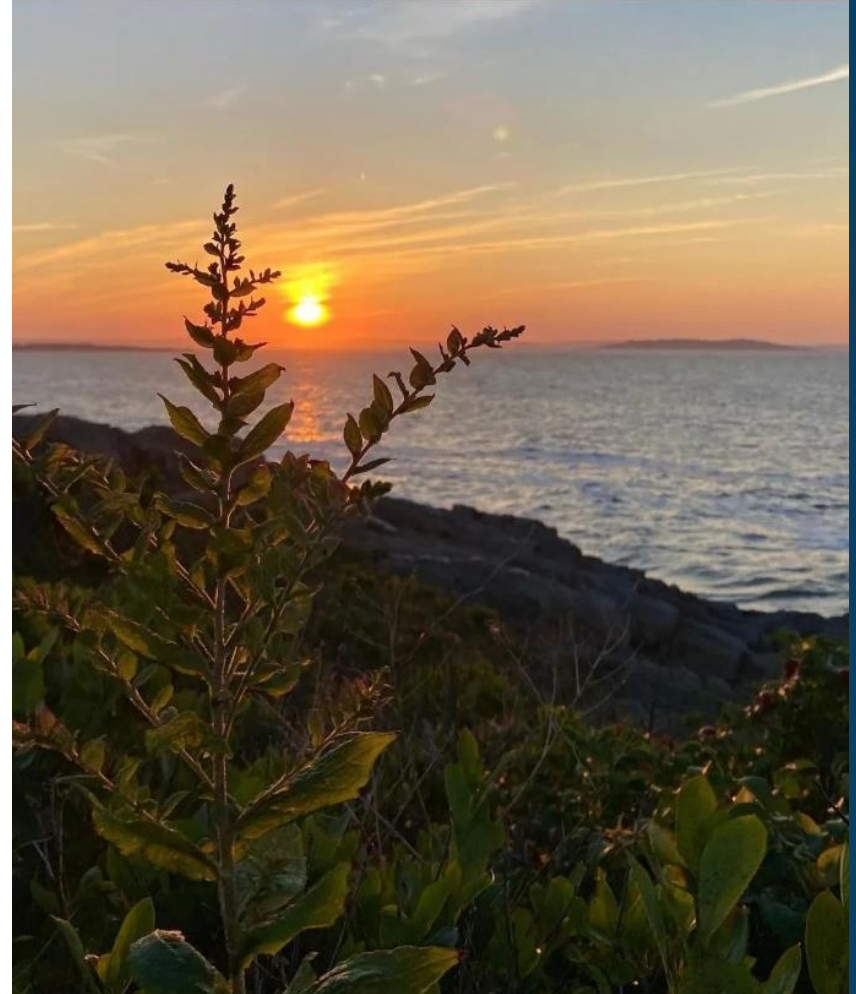
- The top importance factors and reasons for vacationing among Canadian visitors largely mirror the top-rated factors and reasons for visiting Maine
- The **top reason for vacationing**, in general, is the potential for **rest and relaxation** which is the **top emotion felt** by Canadian visitors to Maine and the **top reason to visit Maine**
- A safe destination is the top decision factor for taking a vacation overall and was Maine's top-rated factor across all Canadian regions
  - The safety rating is of note, as one of the negative general perceptions of American destinations among Canadian visitors is an overabundance of guns



# TAKEAWAY #4: DECISION FACTORS

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- The rest of the top decision factors for Canadian visitors were value for the money, quality accommodations, friendly/hospitable local population, and food and beverage experiences
- Maine can deliver on all of these factors, but is only rated strongly on having friendly locals
- This may be an opportunity for messages of deals, ways to connect with quality hotels and other accommodations, and authentic food and beverage experiences (particularly experiences without fried food which Canadians are less likely to be interested in)



# TAKEAWAY #5: MOOD BOARD DIFFERENCES

- When comparing the photos selected to tell the story of a trip to Maine, Canadian visitors (specifically those from Québec) were **much more likely to select images from the beach and places they know** in Old Orchard Beach and Ogunquit
- Canadian visitors (specifically those from Québec) were less likely to select photos with active outdoor activities, such as canoeing or hiking

IMAGES SELECTED MUCH MORE OFTEN



IMAGES SELECTED MUCH LESS OFTEN



**+ Other active outdoor activities**



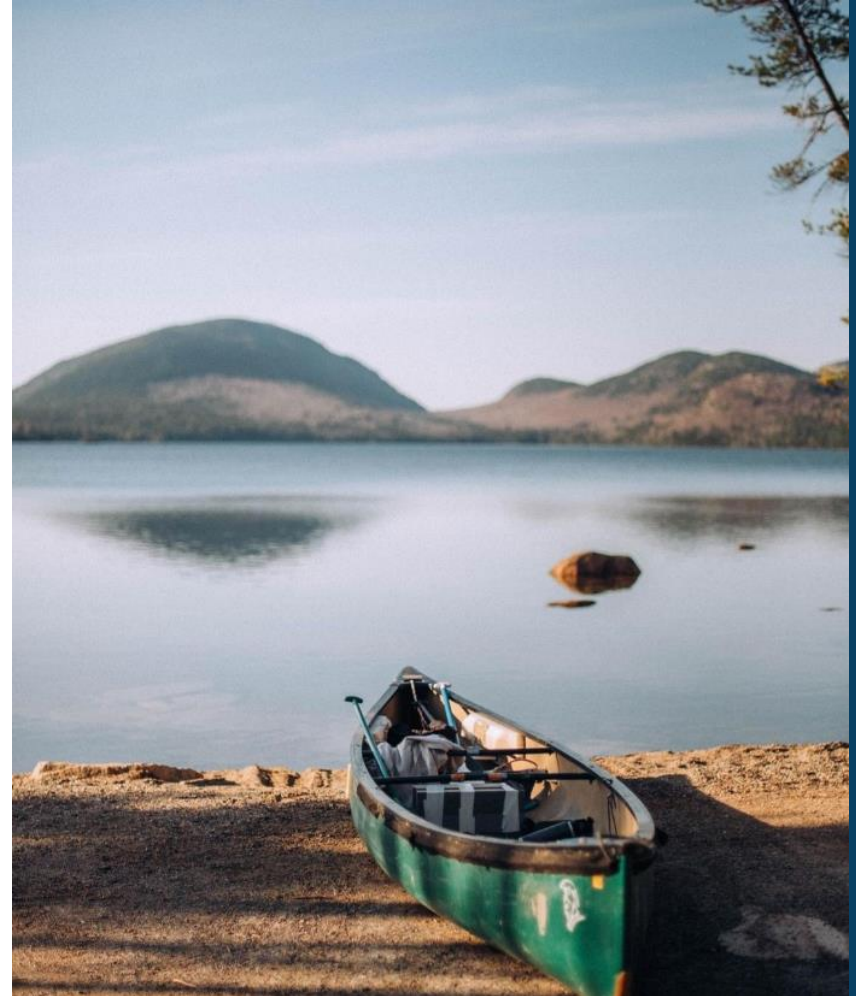
## REPRESENTATIVE QUOTE:

“For me, Maine is the beach, so it’s all beach pictures. Then there’s the little town that you cross when you go there. There’s lobster and food. There’s camping. This is what it means to me. It’s a cool time. It’s smooth and chill.”

# TAKEAWAY #6: PREFERENCE FOR HOTELS

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- **Canadian visitors prefer hotels over vacation rentals or other types of accommodations**
- This finding aligns with the 2022 Maine Visitor Tracking Study data that Canadian visitors were more likely to stay in hotels versus other types of paid accommodations
- Maine received lower overall ratings for the quality of accommodations
  - Potential opportunity for highlighting quality accommodations to Canadians



# TAKEAWAY #8: OTHER MAIN FINDINGS

- Affordability matters more for Canadians
  - The Canadian dollar was worth around \$0.75 compared to an American dollar during the time of this study
  - Value for the money is the second most important decision factor for Canadian visitors
  - The ratings for the affordability of Maine lag behind importance ratings
  - Canadians tend to visit Maine in the summer when rates for paid accommodations are highest
- Visit Maine website is the #2 resource for Canadians to learn more about Maine in this survey
- Summer is considered the best time to visit Maine by a considerable margin followed by Fall
- Québec and Maritimes residents, which make up a larger percentage of Canadian visitors to Maine, have been less likely to travel post pandemic



# TRIP NARRATIVES BY AREA OF CANADA



## QUÉBEC

Jean and Marie from Montréal pile the whole family into the family vehicle Saturday morning and head to their hotel in Old Orchard Beach. While in Old Orchard, the family rides the Ferris wheel, heads out to the pier, and has a lobster roll. The rest of trip never strays far from the water with stops in Portland and Ogunquit until it is time to head back home the following Saturday.



## ONTARIO

William and Olivia from Toronto board the plane at Toronto Pearson Airport for their flight to Bangor. In Bangor, they grab a rental car and head to their hotel in Bar Harbor. The couples' extended weekend includes day trips to Acadia National Park and Portland with plenty of nature and few phone screens.



## MARITIMES

John and Linda from New Brunswick leave their home Friday after work and head to Portland. This short trip includes a seafood dinner in downtown Portland, plenty of shopping, and visits to Bangor and Millinocket before a leisurely drive home Sunday evening. They take this trip 2-3 times per year.



# QUESTIONS?

Downs & St. Germain Research  
Erin Dinkel, M.S. – Director of Research  
[erin@dsg-research.com](mailto:erin@dsg-research.com)  
[dsg-research.com](http://dsg-research.com)