



Survey of Cruise Visitors to Maine

Behavior, Attitudes, and Spending of
Passengers and Crew

August 2019

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Table of Contents

Executive Summary	3
Background and Methodology	4
Key Findings	5
Cruise Travel to Maine	6
On-shore Experiences	9
Views Toward Ports and Port Experiences	15
Cruise Visitor Spending	22
Demographics of Cruise Visitors	28
Appendix: Summary of Economic Impact Calculations	31

A large cruise ship, likely a Norwegian Cruise Line vessel, is shown sailing on a body of water. The ship is white with a dark hull and features multiple decks with balconies. The name 'Norwegian' is visible on the side. The ship is moving towards the left, leaving a wake. In the background, there are hills and a cloudy sky. Two small orange and white inflatable boats are visible in the water near the ship.

Executive Summary

Background and Methodology

Background

- The Maine Office of Tourism, in association with CruiseMaine, commissioned DPA to conduct a study of cruise ship visitors to Maine. The goal of the research was to help the state measure: cruise visitor characteristics, how cruise visitors spend their time on-shore, how cruise visitors feel about their on-shore visits, their likelihood to return to the state by cruise or other methods, and the economic impact generated by cruise visitor spending in the state.
- The research was conducted between July 13 and November 7, 2018 at the following ports:

	Berth Capacity*	Total Surveyed
Bar Harbor	387,711	1,248
Bath	2,238	93
Belfast	2,320	95
Boothbay Harbor	4,695	45
Camden	4,945	31
Castine	2,320	86
Eastport	1,169	76
Portland	253,190	556
Rockland	7,219	305
Total	665,800	2,535

- Surveying was conducted on ships of all sizes (ranging from those with fewer than 200 passengers and crew to those with more than 6,000 passengers and crew) and included a wide variety of cruise lines.

Please note that this research was intended to quantify the direct expenditures of cruise visitors to Maine and the associated economic impacts of those expenditures. It was not designed to measure the other economic impact of cruise visiting, such as docking fees, piloting fees, or food or beverages purchased by the cruise lines. More information about the scope of the study is included on page 23.

Methodology

- Professional survey interviewers were stationed where passengers and crew returned to their ship or tender. These interviewers provided a paper questionnaire to visitors as they returned to their ship from a shore visit.
 - All visitors – both passengers and crew members – were invited to complete the questionnaire.
 - The questionnaire was designed to take respondents no more than five minutes to complete.
 - A total of 2,535 passengers and crew members took part in the survey.
 - In all, surveys were conducted at 79 cruise ship port arrivals.
- Interviews were conducted by one or two interviewers in four-hour shifts, with the goal of obtaining 25 or more questionnaires per interviewer during each shift.
 - The estimated berth capacity of ships and the number of surveys actually collected at each port is shown at left.
 - Several cruises to Maine stop at multiple ports in the state. Every effort was made to avoid surveying visitors from a single ship more than twice.
 - In order to avoid skewing passenger-specific information from visitors surveyed more than once, the questionnaire included a question about whether the respondent had taken the survey previously. All demographic information presented in this report only includes those who had not taken the survey at another port.
- The survey data are balanced to represent the total population of estimated cruise ship arrivals by month and surveyed port.

* Information provided by CruiseMaine. Refers to potential passenger and crew arrivals, assuming ships were at full capacity. Actual, measured occupancy is 94%.

Key Findings



Cruise Visitors Are Highly Pleased With Their Visits to the State.

Eight out of ten cruise visitors are highly satisfied with their time on-shore in Maine.

Another eight out of ten are highly likely to recommend a trip to Maine to others based on their time on-shore.

At least eight out of ten cruise visitors believe the port towns they visited offer natural and unspoiled environments, high-quality service, and a warm welcome.

Cruises Inspire Continued Visitation.

More than half of cruise passengers are first-time visitors to Maine, and one-third of all passengers say they are likely to return to the state, either by cruise or other means.

Cruise Visitors Spend Several Hours in Port Towns and Take Part in a Number of Activities.

The typical cruise visitor spends four hours in the port towns they visit.

Nine out of ten go sightseeing or touring in the areas they visit, and many go shopping or visit specific port attractions.

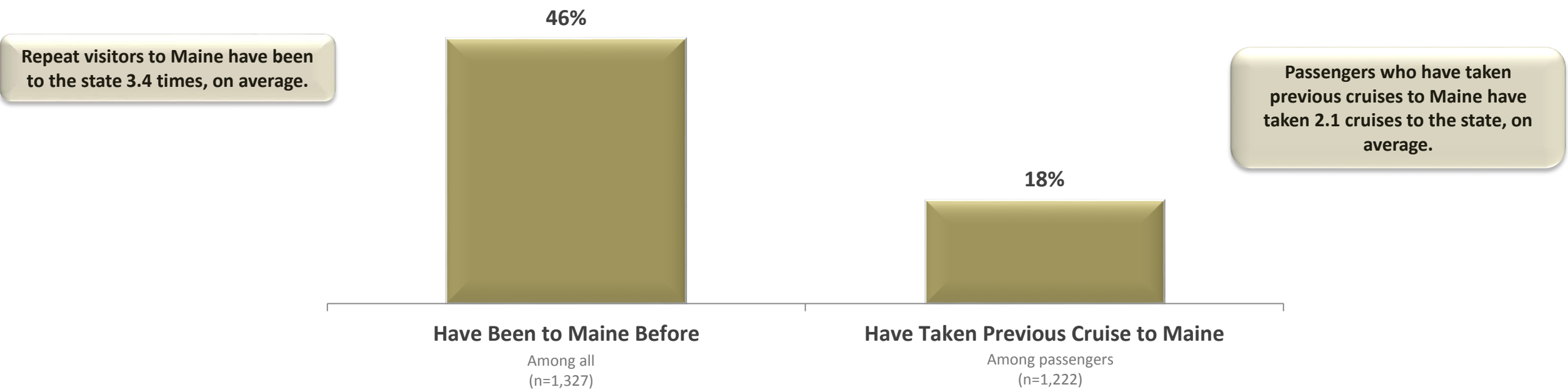
More than 400,000 cruise visitors spent a total of \$29 million in the state during the 2018 cruise season. When coupled with indirect (induced) spending, cruise visitor spending generates at least \$33 million in overall economic impact, supports almost 400 jobs, and provides \$1.7 million in tax revenue for Maine.

A large, multi-decked white cruise ship is docked at a wooden pier. The ship has many windows and balconies. Its name, "Paul Mitchell", is visible on the side. The ship is reflected in the calm water in front of it. The background shows a clear blue sky and some greenery on the shore.

Cruise Travel to Maine

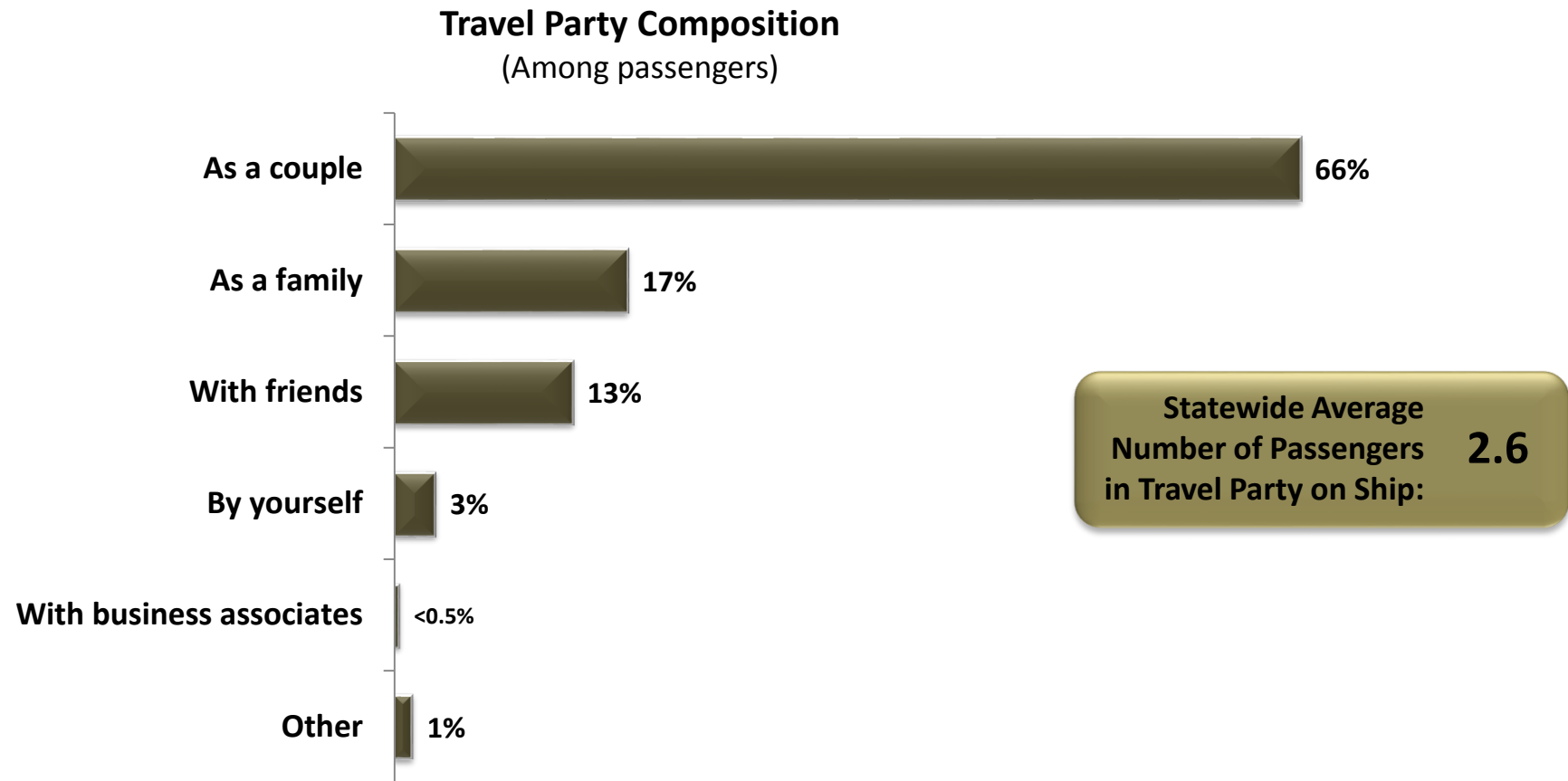
More than half of all surveyed cruise ship visitors (including passengers and crew) have not visited Maine prior to their cruise.
Two out of ten passengers have taken previous cruises to Maine.

Prior Visits to Maine



Have you **ever** been to Maine prior to this cruise (regardless of how you arrived)? IF YES: Number of previous visits: __
Have you taken previous **cruises** that have stopped in Maine? IF YES: Number of previous cruises: __
Includes only those visitors who are confirmed to have taken the survey only once.

Two out of three cruise ship passengers are traveling as a couple.
The typical passenger is traveling in a group of 2 to 3 people.



(n=1,371)

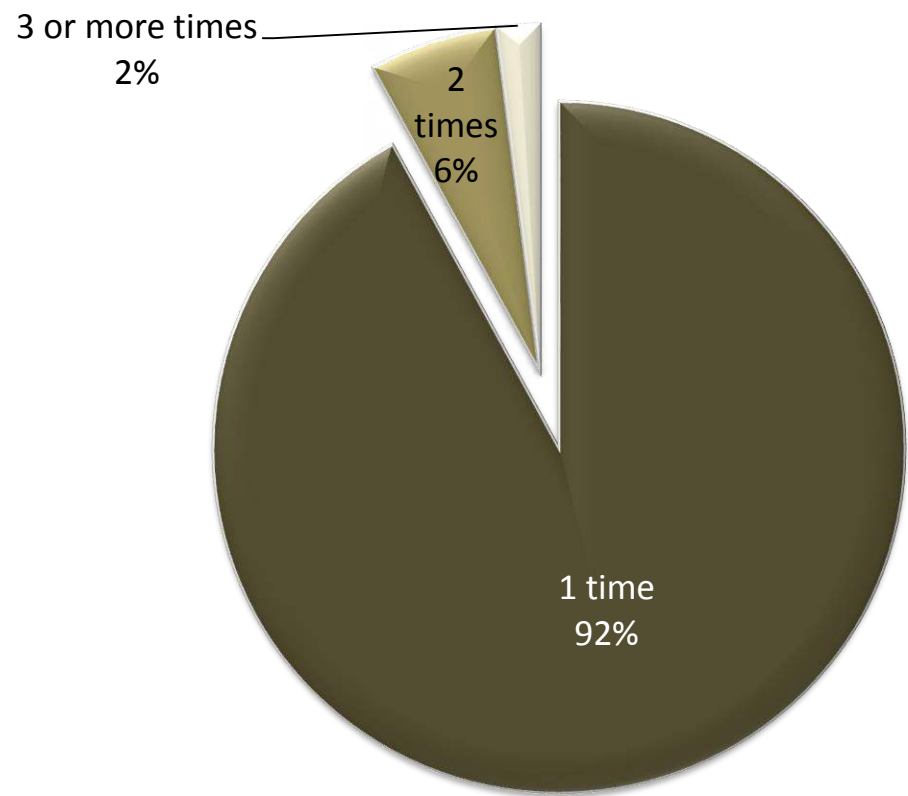
On this cruise, are you traveling: (Please select all that apply.)
Including yourself, how many people are in your immediate travel party on this cruise? (Please only include those individuals you are traveling with as a group.)
Includes only those visitors who are confirmed to have taken the survey only once.

A large white multi-deck ferry ship named "Pinar Altın" is docked at a pier. The ship has multiple decks with many windows and balconies. It is reflected in the calm water in front of it. The background shows a clear blue sky and some greenery on the shore.

On-shore Experiences

The large majority of cruise ship visitors who disembark – nine out of ten – do so only once.

Number of Times Visitors Disembark While at Port



Statewide Average Number of
Times On-shore: **1.1 times***

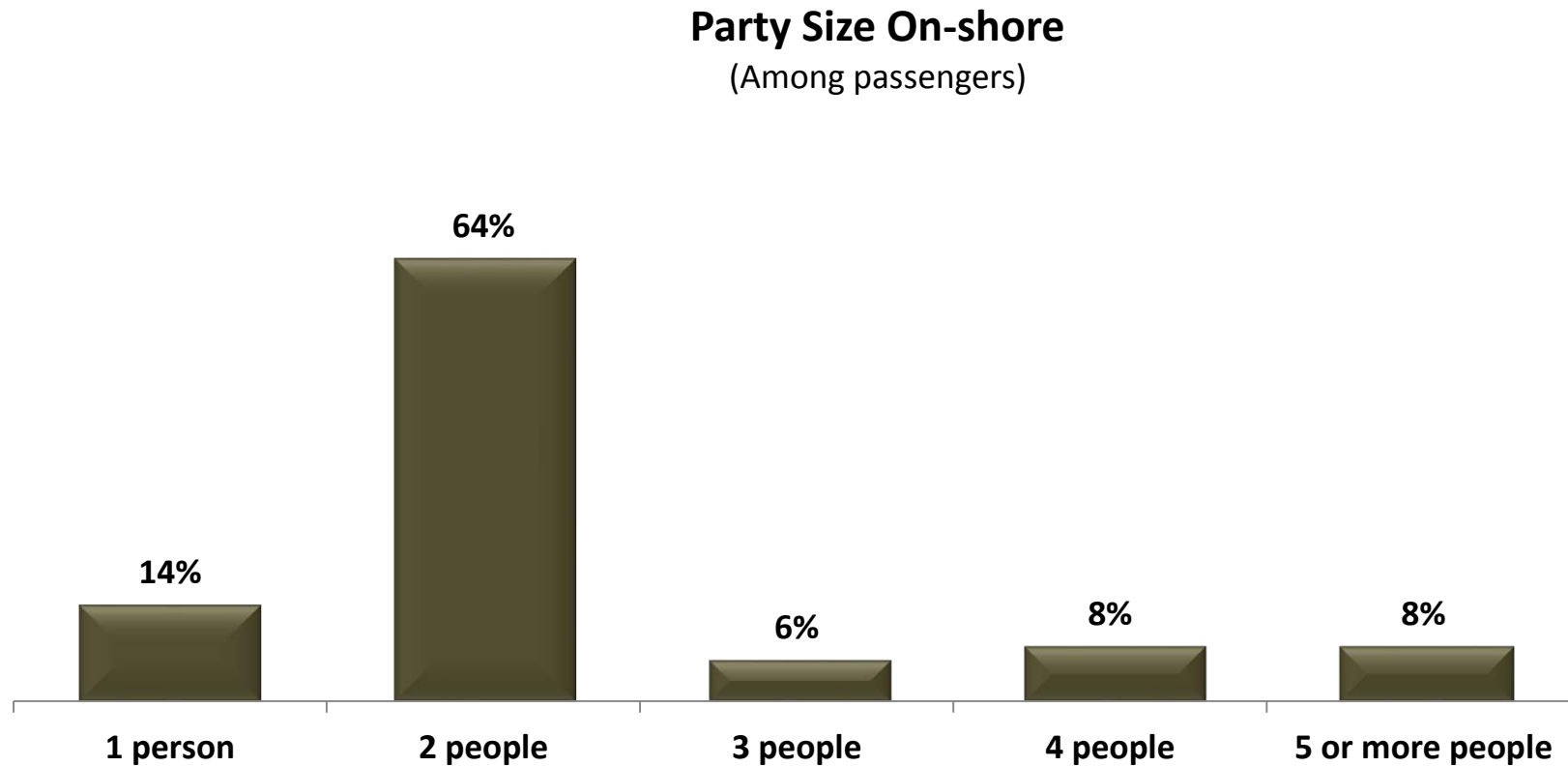
Statewide Average Amount of
Time Spent On-shore: **4.1 hours**


(n=2,474)

How many times, in all, have you left (or expect to leave) your cruise ship on your visit to this port today?
*Assumes visitors surveyed in Bar Harbor come to shore one time. The number of times passengers disembark and the amount of time they spend on-shore are dramatically impacted by whether ships dock or tender at that port. So it is important to note that these are the overall state averages across both types of ports.

The typical passenger comes to shore in a group of two to three people.

Shore Visit
Party Size

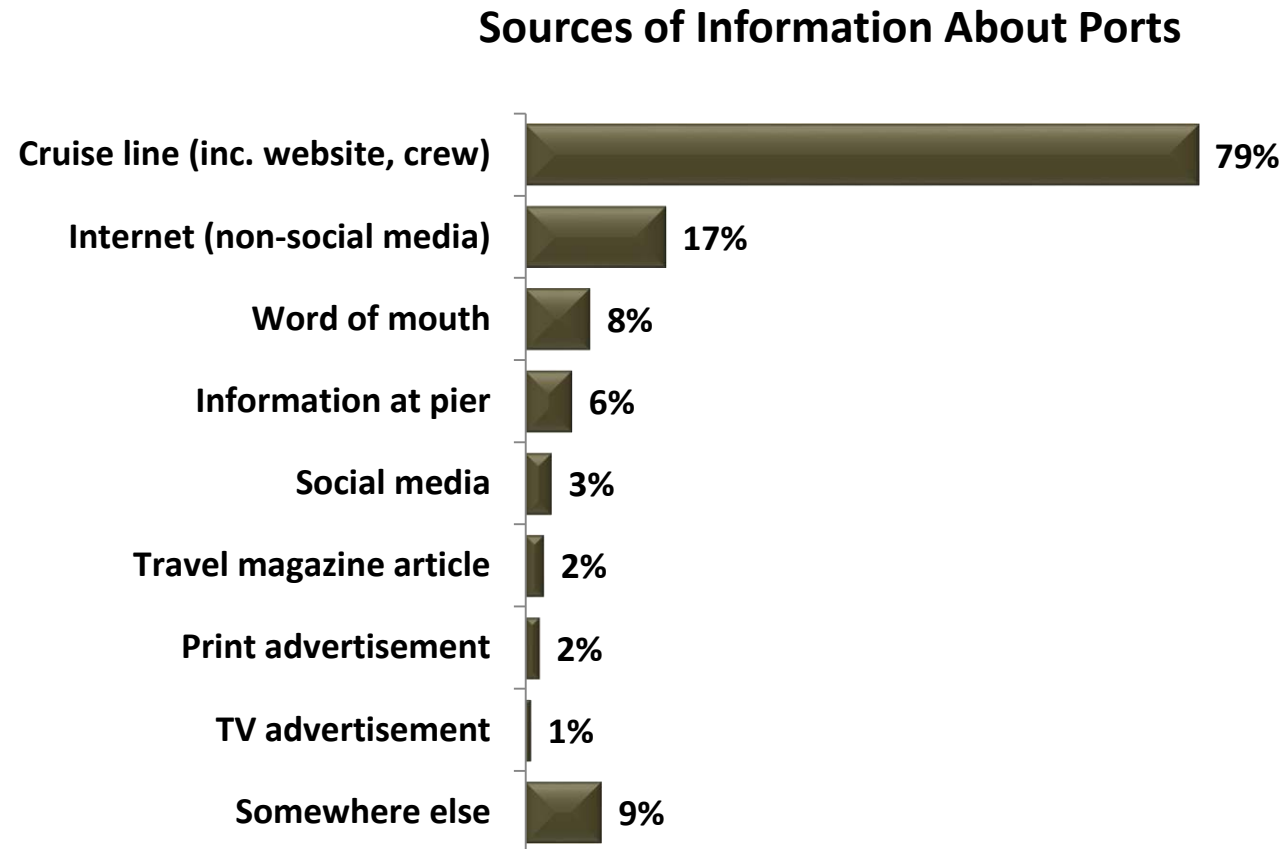


Statewide Average
Number of Passengers
in Party On-shore:  2.5

(n=2,043)

How many people accompanied you off the ship on this visit? (Again, please only include the people you are traveling with. If no one accompanied you, please write "0.")

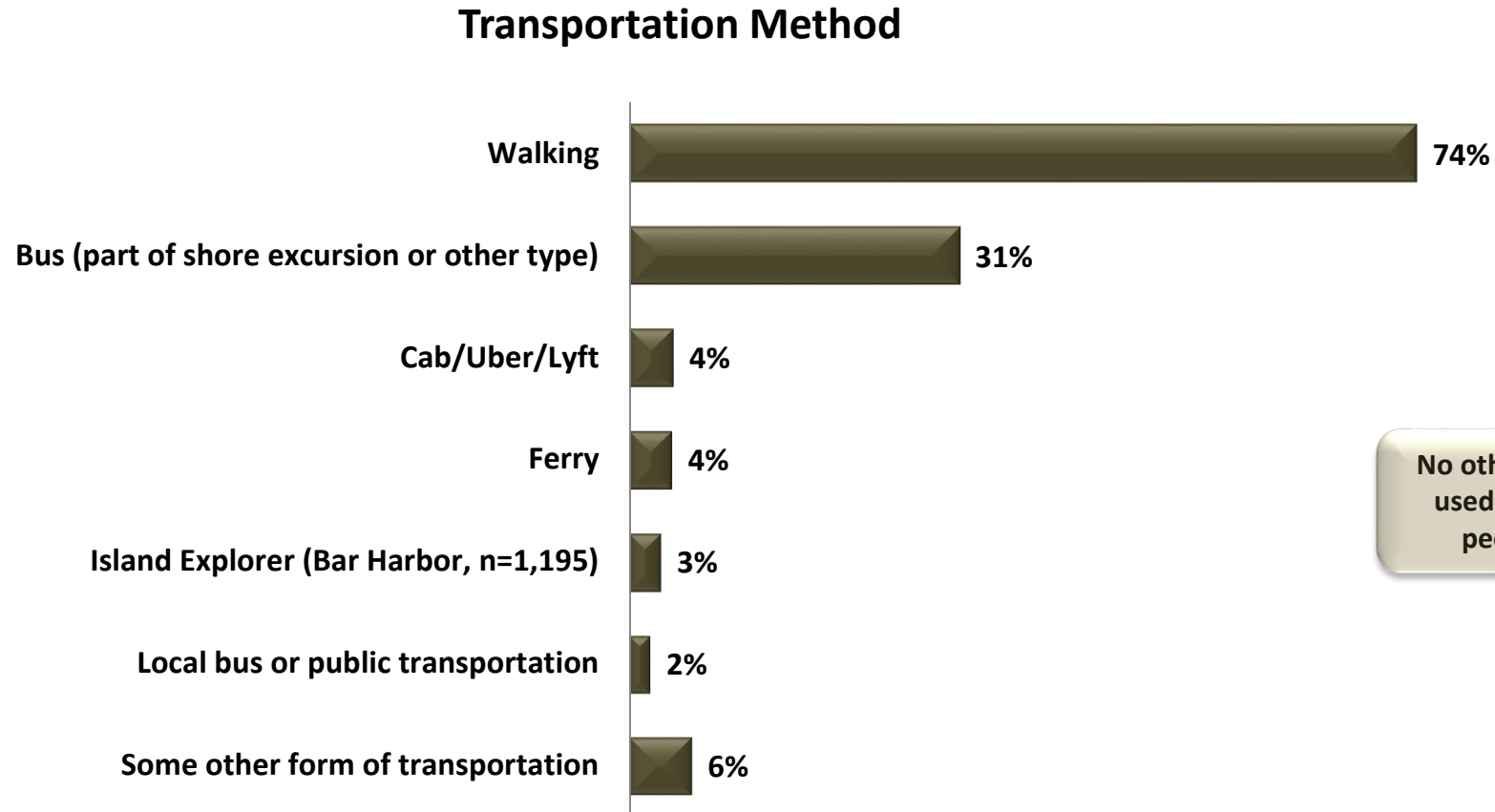
Eight out of ten visitors receive information about Maine's ports from cruise lines.
The internet, used by two out of ten visitors, is a distant second.



No more than one out of ten visitors use any other source of information about Maine's ports.

(n=2,286)

Three out of four cruise visitors walk around the ports they visit, making it by far the most common way visitors get around on shore. Far fewer – one out of three – use shore excursion buses.

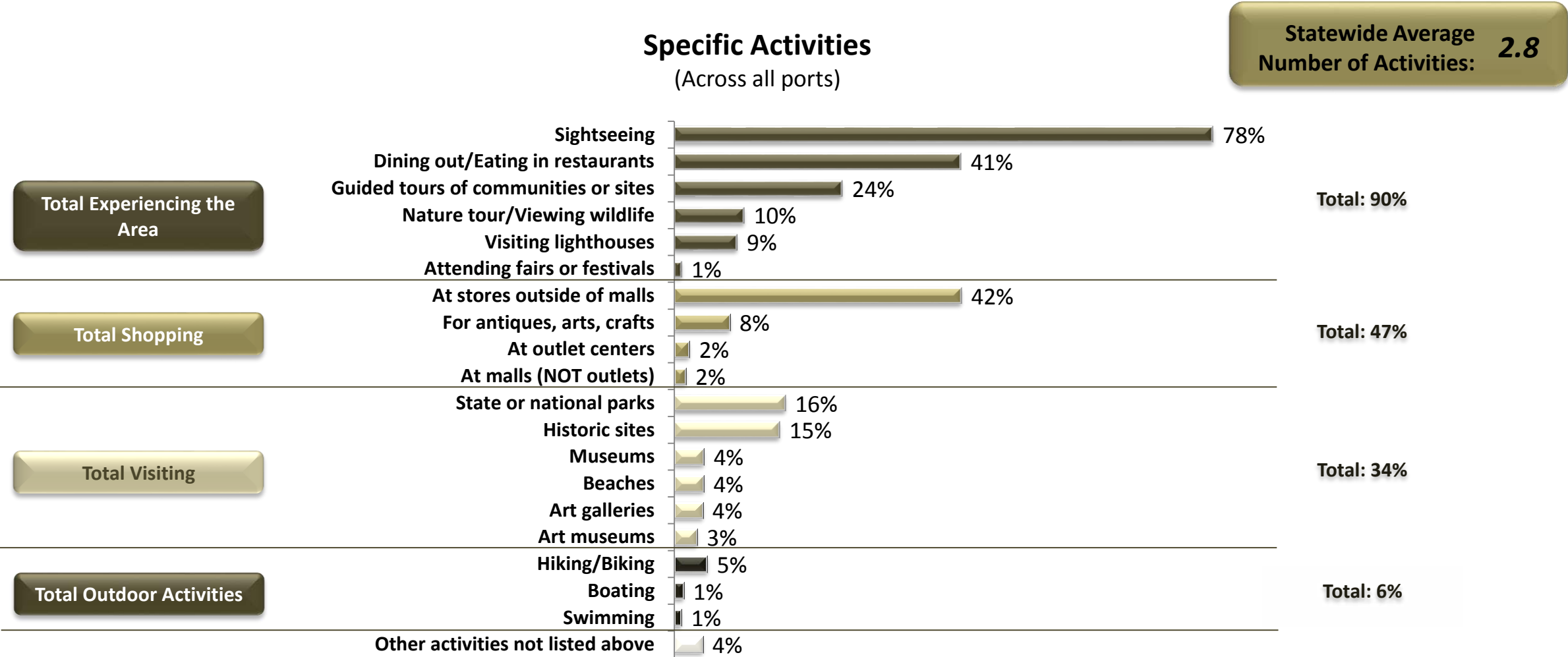


No other form of transportation is used by more than a handful of people at any specific port.

(n=2,441)

What form(s) of transportation did you use after leaving the pier? (Please select all that apply.)

Nine out of ten visitors tour or explore port towns when they leave their ship. About half go shopping, and one-third visit a specific historic or cultural attraction in or around the ports they visit.



(n=2,402)

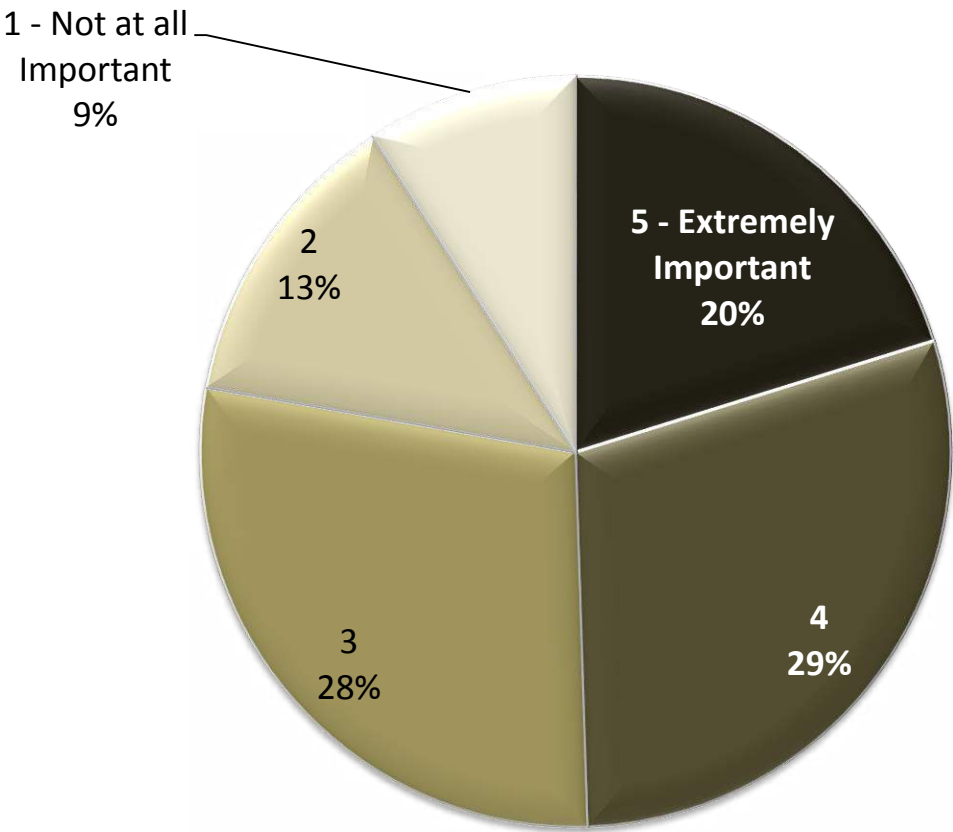
Which of the following specific activities did you participate in after leaving the ship? (Please select all that apply.)



Views Toward Ports and Port Experiences

Half of all passengers say a port in Maine had a highly important role in their overall choice of which cruise to take.

Importance of Port in Itinerary Selection



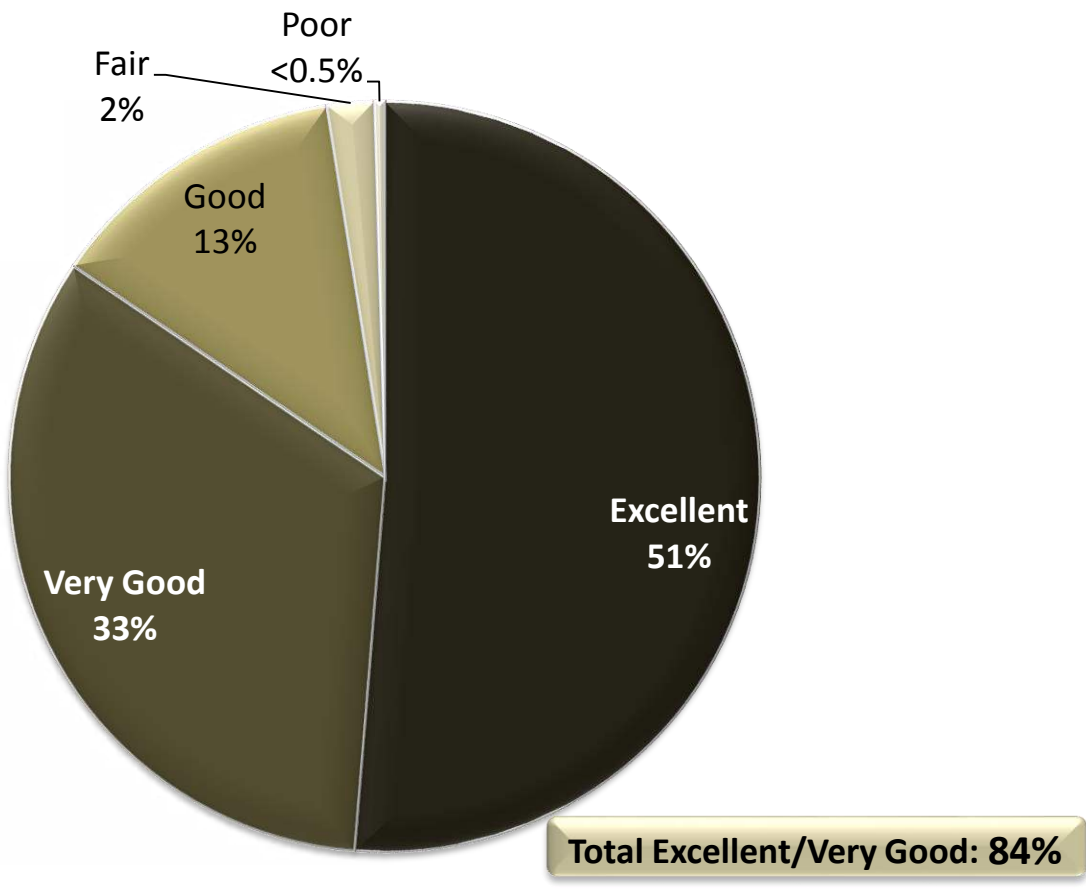
Total Highly Important Role: 50%

(n=2,247)

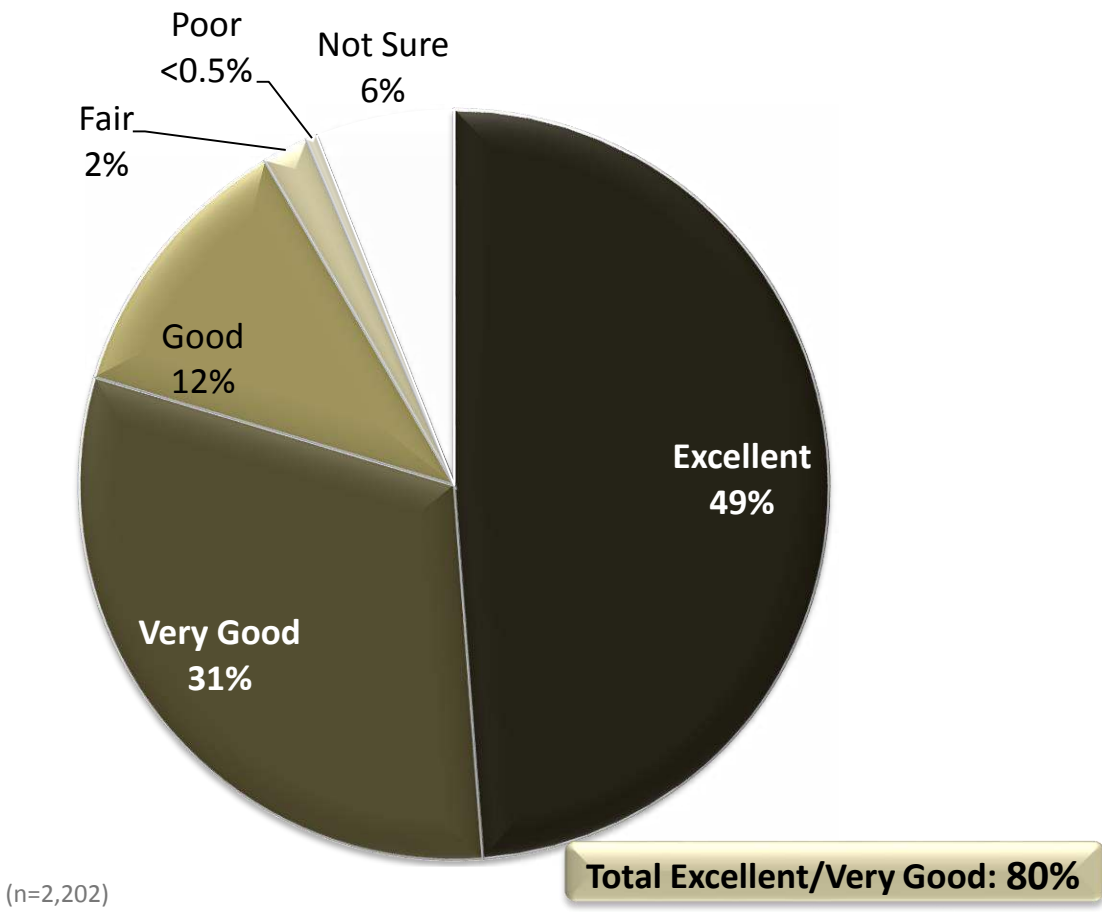
How important was this area in your decision to take this cruise or select this itinerary?
Scale: 1 "Not at all important" to 5 "Extremely important." Note: Scale points 2-4 had no label. "Highly important" includes the percentage selecting 4 or 5 on this scale.

Large majorities of visitors – eight out of ten overall – rate Maine’s ports as *excellent* or *very good* at providing a welcoming atmosphere or good service.

Providing a Warm, Welcoming Atmosphere



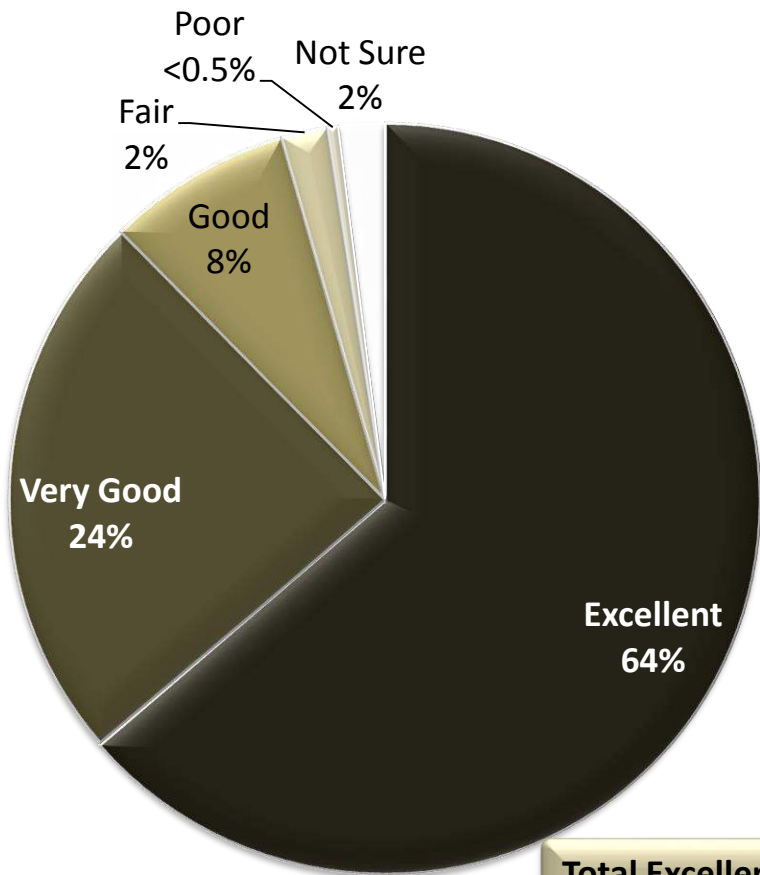
Providing Good Service in Shops and Restaurants



Overall, how would you rate the area(s) you visited while you were off the ship in terms of the following?

Nearly nine out of ten cruise visitors rate Maine’s ports as *excellent* or *very good* in terms of providing natural beauty or a clean, well-kept environment.

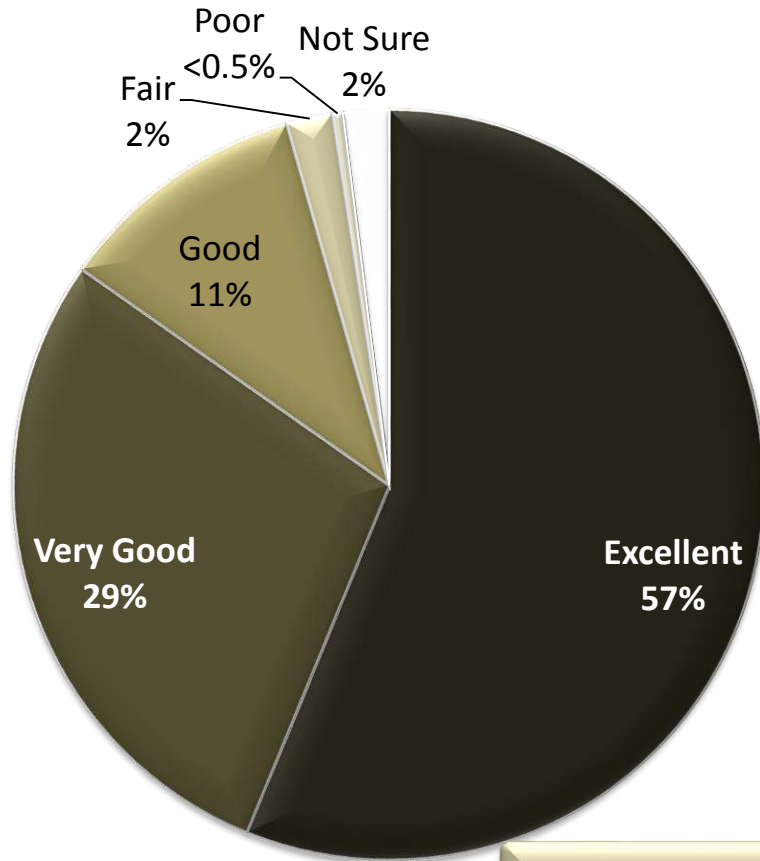
Providing Natural Beauty



(n=2,220)

Total Excellent/Very Good: 88%

Providing a Clean, Well-kept Environment



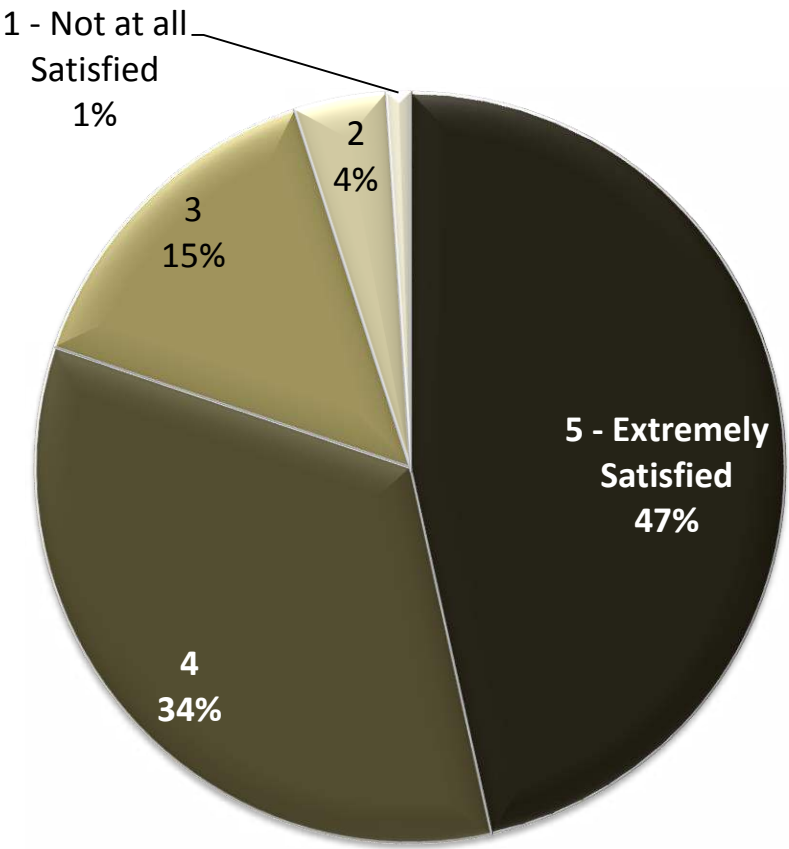
(n=2,240)

Total Excellent/Very Good: 86%

Overall, how would you rate the area(s) you visited while you were off the ship in terms of the following?

Eight out of ten surveyed cruise visitors are highly satisfied with their experiences on shore, with almost half calling themselves *extremely* satisfied.

Satisfaction With On-shore Experiences



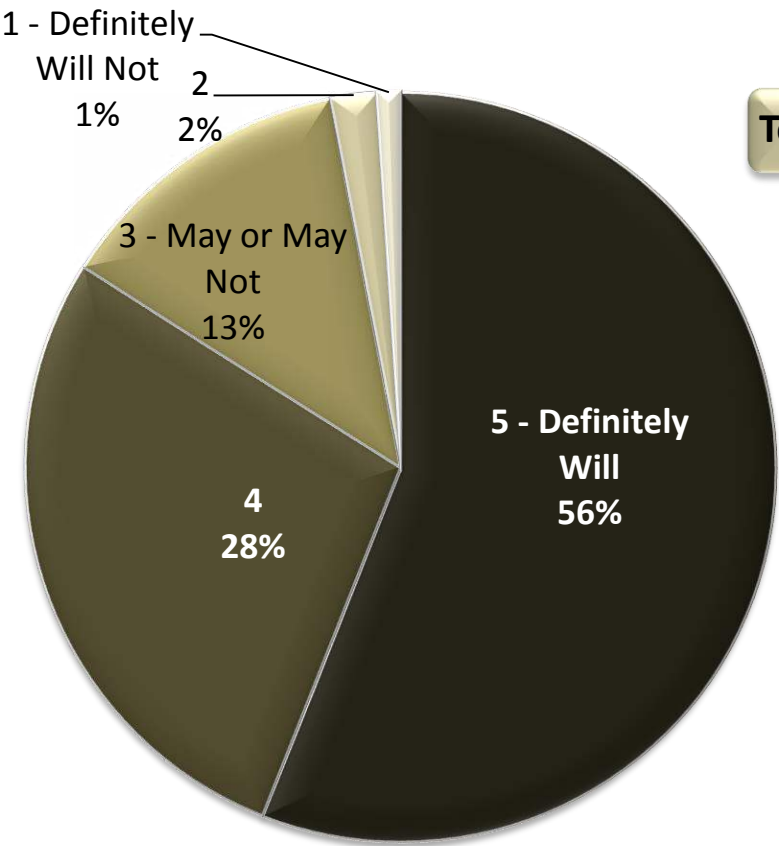
Total Highly Satisfied: 81%

(n=2,282)

How satisfied would you say you are, overall, with your experience on shore on this visit to the area?
Scale: 1 "Not at all Satisfied" to 5 "Extremely Satisfied." Note: Scale points 2-4 had no label. "Highly satisfied" includes the percentage selecting 4 or 5 on this scale.

More than eight out of ten cruise visitors to Maine would recommend a trip to the state to others. Most of these – almost six out of ten overall – would *definitely* recommend a trip to Maine.

Likelihood of Recommending a Trip to Maine



Total Highly Likely to Recommend: **84%**

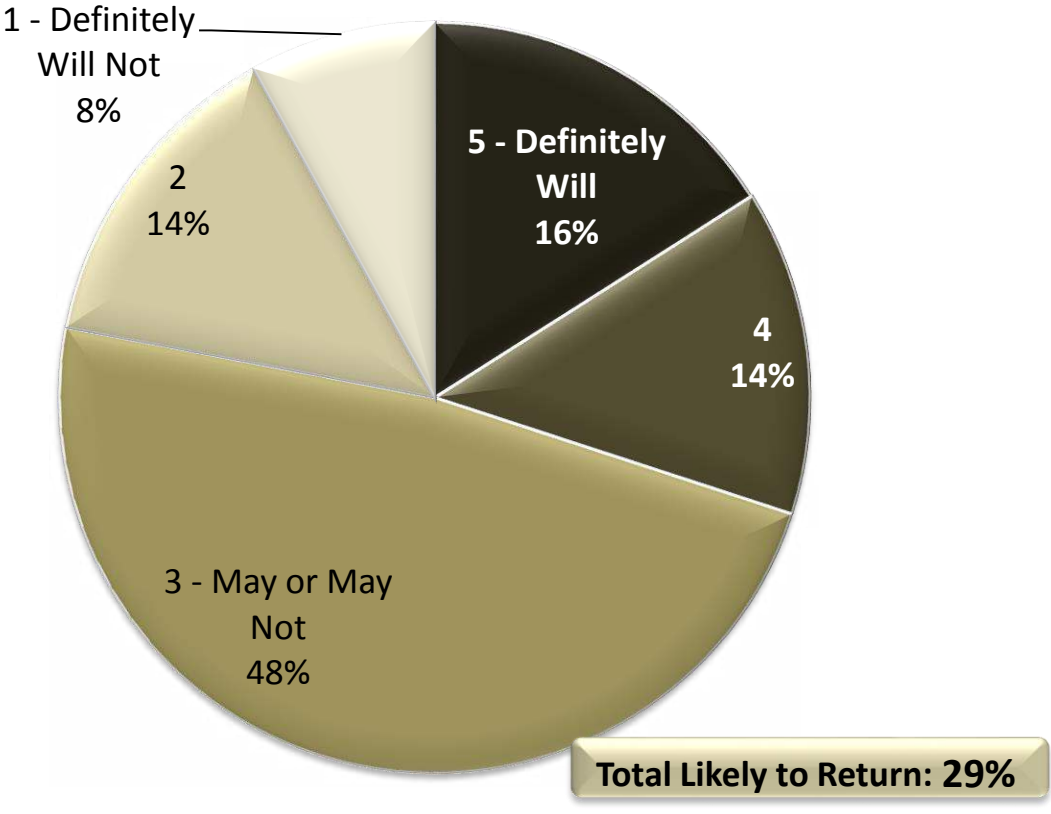
Predictably, overall satisfaction and likelihood to recommend are related, though the strength of the relationship (on a scale of 0 to 1) is a very strong 0.9. This suggests that cruise visitors to Maine are highly likely to act on their satisfaction and spread the word about Maine, perhaps spurring additional visitation.

(n=2,263)

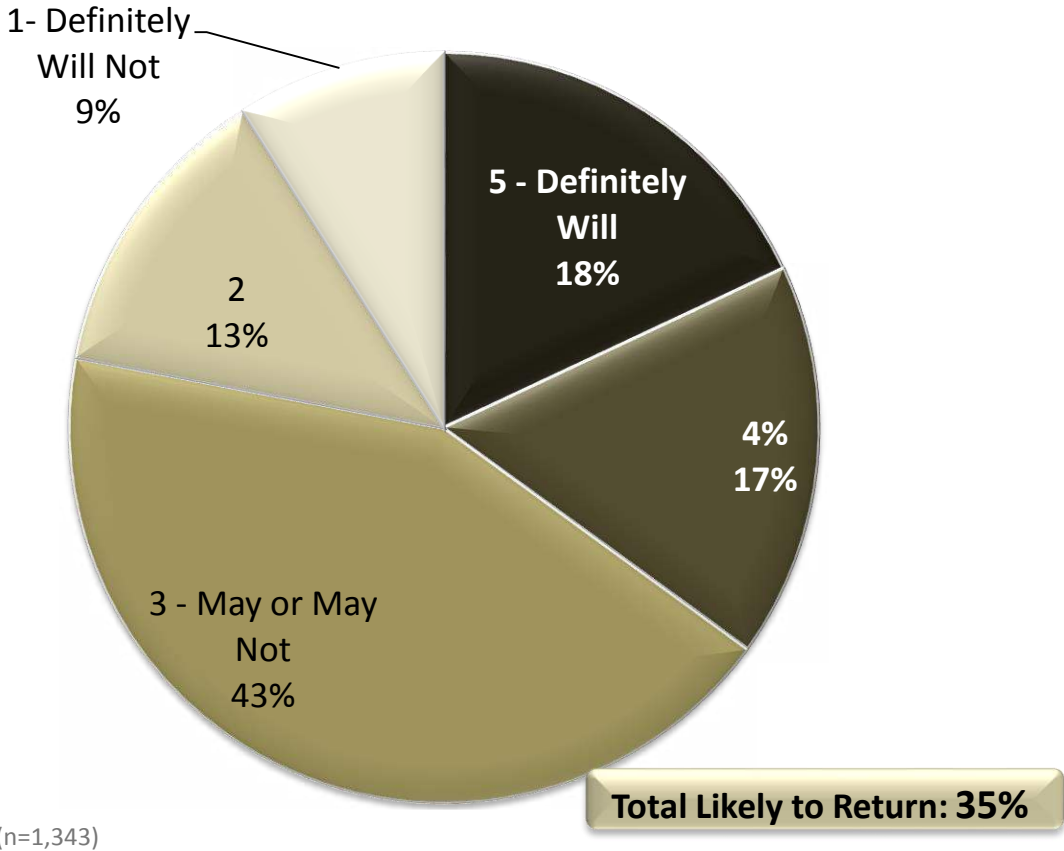
Based on your experience on shore, if asked, how likely would you be to recommend a trip to Maine to others?

About one out of three passengers consider themselves likely to return to Maine in the near future – whether by cruise or other methods. Most of the rest would likely consider it.

Likelihood to Return to Maine by Cruise
(Among passengers)



Likelihood to Return to Maine by Other Methods
(Among passengers & crew)



How likely would you say you are to return to Maine in the next five years by cruise?
How likely would you say you are to return to Maine – by methods besides a cruise – in the next five years?
Includes only those visitors who are confirmed to have taken the survey only once.

Cruise Visitor Spending



About The Direct Spending and Economic Impact Estimates

The following pages present **this survey's estimates of cruise ship passenger and crew spending in Maine.**

Per-person spending is used to calculate the overall economic impact that cruise ship visitors provide the state.

It should be noted, however, that measured per-person spending and the estimated overall economic impact from this spending may be affected by a number of factors, including:

- General research methodology,
- Question wording,
- Type of spending requested,
- Measured disembarkation rates,
- Ship occupancy, and
- Economic impact modeling.

Therefore, different surveys may provide different estimates of the impact of cruise visitor spending.

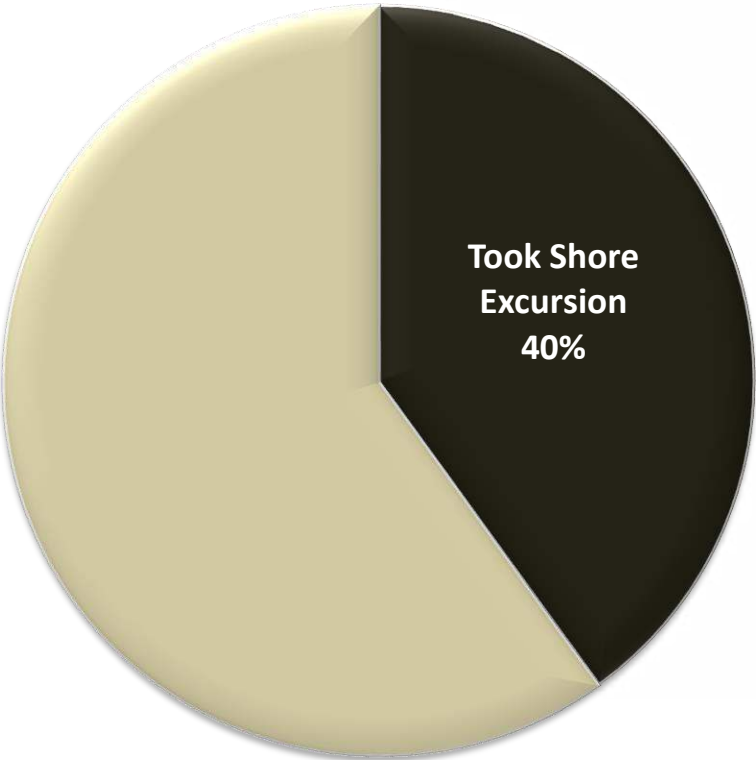
It should also be noted that the cruise industry's total economic impact on Maine extends well beyond direct spending.

The scope of this study **did not include** – and was not intended to measure – other economic benefits of cruise travel in Maine, including, but not limited to:

- Head taxes paid to port towns,
- Wholesale food purchases and provisioning,
- Pilot services,
- Waste disposal, and
- Other products or services procured by cruise ships.

Four out of ten passenger trips on-shore include an excursion that was booked through a cruise line, at an average cost of about \$120 per party and nearly \$60 per person.

Paid Shore Excursions



Statewide Average
Cost of Cruise Line
Shore Excursions: **\$ 121 per party**
\$ 57 per person

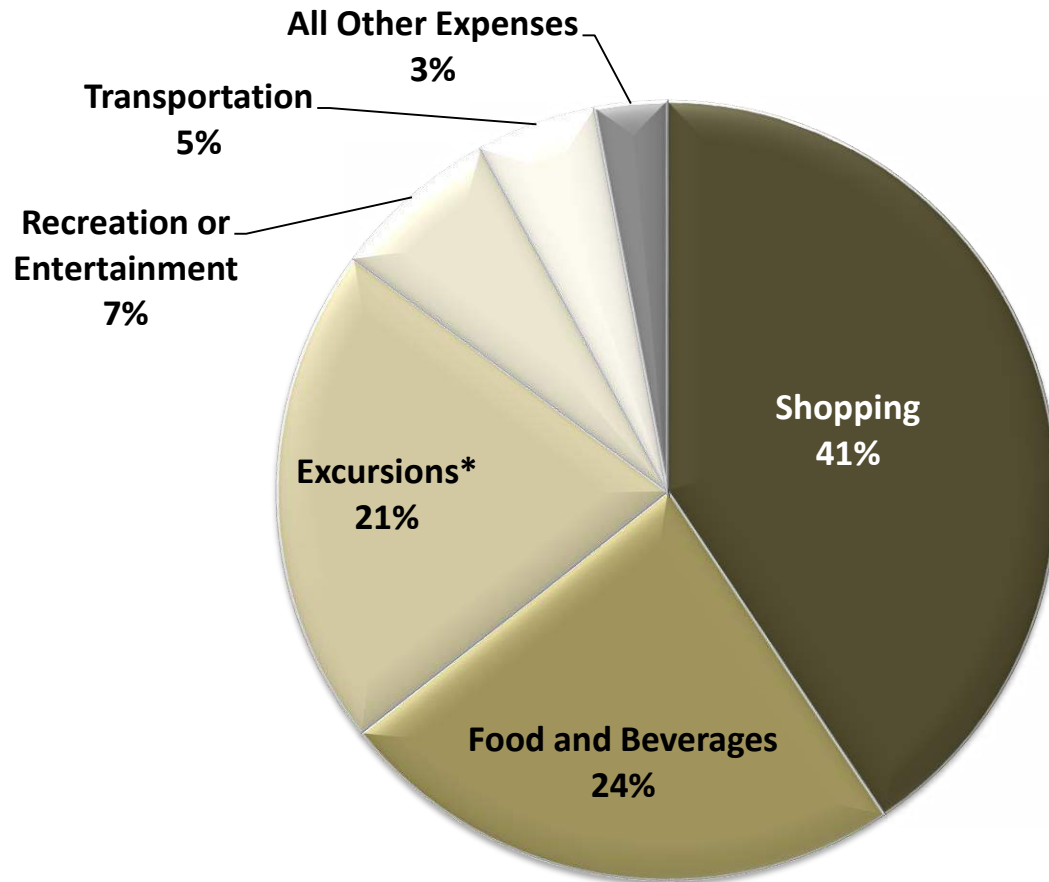
It is estimated that at least 50% of this excursion
spending remains in Maine's economy.

(n=2,329)

Did you take a shore excursion today that you booked through your cruise line?
How much did you pay for the excursion for your travel party (and just the excursion)?

The average visitor on cruise ships spends about \$70 on each visit to Maine's ports.

Statewide Average Spending Per-person Per Shore Visit



Statewide Average Spending Per-person on Each Shore Visit: \$69

Statewide Averages Among Spenders (per-person on each shore visit)**

Shopping	\$39
Recreation or Entertainment	\$38
Transportation (not including the cruise)	\$28
Food and Beverages	\$23
Excursions*	\$57
All Other Expenses	\$34

Overall per-person spending, including cruise line sponsored shore excursions, is \$69.02.

For the economic impact analyses shown on the following pages, we assume that 50% of spending on cruise line sponsored shore excursions stays in Maine's economy. With 50% of cruise line sponsored shore excursion expenses included, average per-person spending would be \$61.76 for passengers and \$66.67 for crew. These are the spending figures used for the economic impact analysis shown on the following pages.

How much did your travel party spend during your time off the ship today on the following types of purchases?

*Represents the costs of organized shore excursions paid to cruise lines. ** The "Averages Among Spenders" include only visitors who spent any money on the specific categories shown above; those who did not spend anything on a category are not included in these means. The other figures provided do include those who did not spend anything.

At least 420,000 visits to shore are made by passengers and crew, resulting in direct spending of \$29 million across the state.

**Total Spent by Cruise Ship
Passengers and Crew: \$28.9
Million**

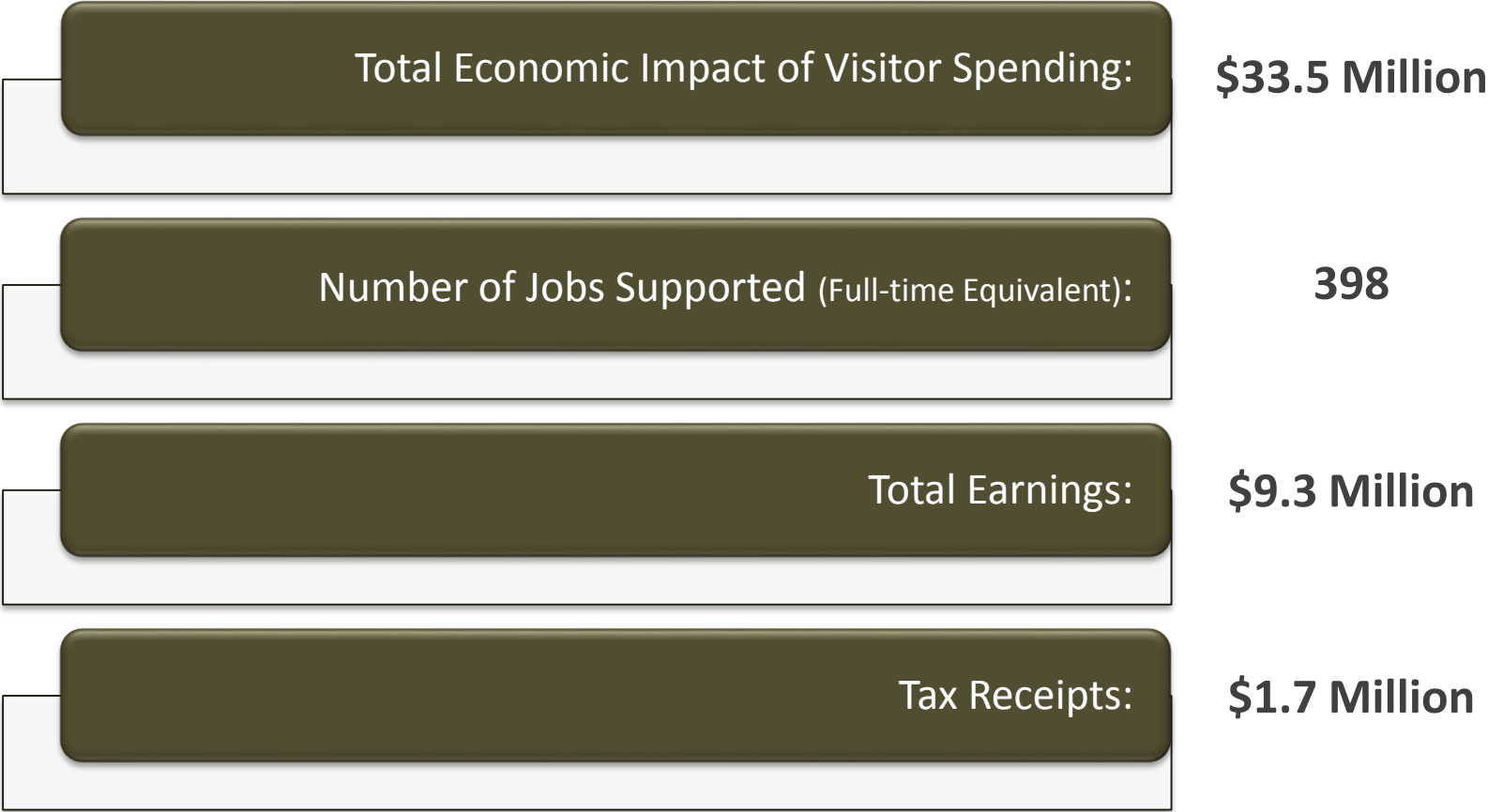
	Total Direct Spending
Shopping	\$13.3 million
Food and Beverages	\$7.7 million
Recreation or Entertainment	\$2.2 million
Transportation (not including the cruise)	\$1.5 million
All other expenses (including shore excursions*)	\$4.3 million

Total spending across the state is calculated by applying the average per-person spending* on each shore visit to 423,000 disembarking visitors, derived from:

- A 94% occupancy rate on ships at each port,
- An 85% overall disembarkation rate among passengers, and
- A 23% overall disembarkation rate for crew.

*In gauging the economic impact on Maine, only half of any spending on cruise line sponsored shore excursions is included, as not all of that spending provided to the cruise line remains in the state. The total per-person spending figure used for the economic impact analysis is therefore \$61.76 for passengers and \$66.67 for crew.

Spending by cruise passengers and crew generates at least \$33 million in total economic impact, supports 400 jobs, and generates \$1.7 million in tax revenue for Maine.



This study captured spending by visitors (passengers and crew) on cruise ships and estimates the overall economic impact of this spending. Cruise ships require a variety of other services, however, which they may or may not receive at a given port. This research was not designed to measure the economic impact of passenger head taxes, food purchases, pilot services, waste disposal, or other services obtained directly by the cruise ship and paid for by the cruise lines. Total economic impact estimates, number of jobs, earnings, and tax receipts are calculated using a RIMS II model.

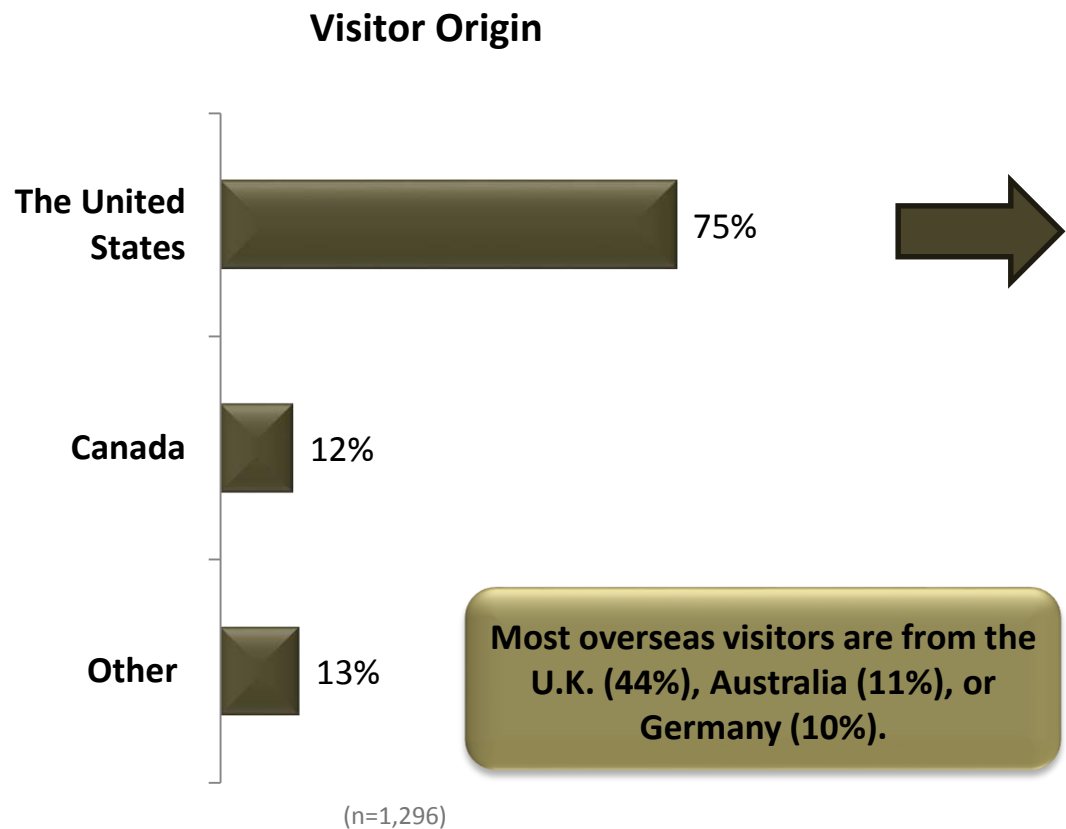


Demographics of Cruise Visitors

The average surveyed cruise visitor is just over 60 years old, and makes more than \$100,000 per year. Three out of four have a college degree, and eight out of ten are married or living with a partner.

Total	
Average age	62 years
Average income	\$104,000
% female	60%
College degree or higher	76%
Married/Living with partner	81%
% of respondents who are passengers	96%

Three out of four cruise ship visitors are Americans – most commonly from the south or northeast.



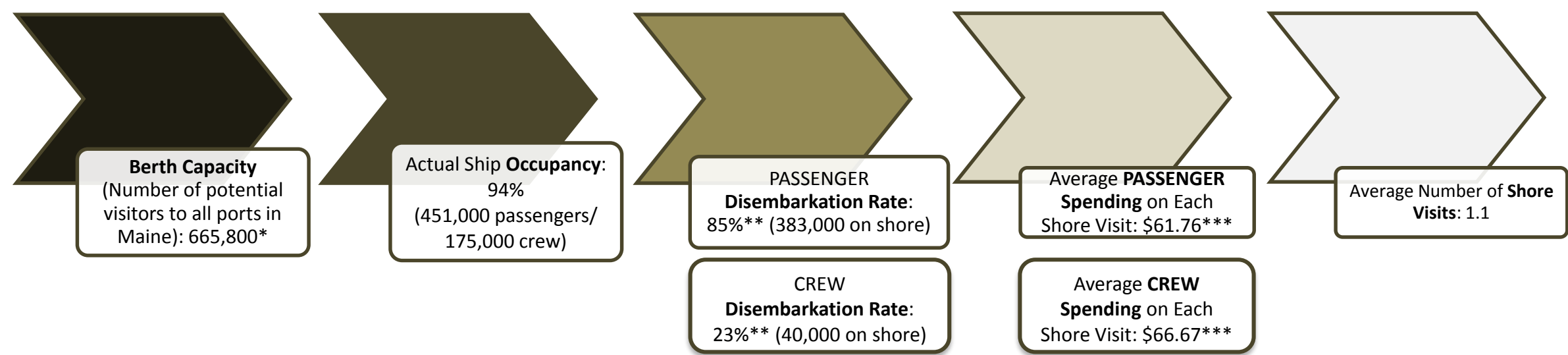
Census Divisions	
Northeast	29%
New England	8%
Mid-Atlantic	21%
Midwest	16%
East North Central	10%
West North Central	5%
South	35%
South Atlantic	22%
East South Central	4%
West South Central	8%
West	21%
Mountain	7%
Pacific	13%

(n=834) Among those who live in the U.S.



APPENDIX: Summary of Economic Impact Calculations

Economic Impact Calculations



* Information provided by CruiseMaine.

** Passenger disembarkation provided by the Cruise Line International Association based on average disembarkation in the Northeast; Crew disembarkation reflects information provided by Bar Harbor (a port where visitors are tendered to shore) and Portland (a port where ships dock).

*** Includes all spending on shopping, food and beverages, recreation, transportation, and 50% of spending on cruise line shore excursions.



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