

Maine Office of Tourism Visitor Tracking Research 2012 Calendar Year Annual Report

Canadian Visitors

Prepared by



April 2013

Introduction and Methodology



- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors. **The Maine Office of Tourism Visitor Research Program** is conducted online, with survey participants recruited from the *ResearchNow* national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - **Regional Travel Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders who have taken a day trip in Maine that is at least 50 miles from home within the past four weeks.
 - **National Omnibus Survey**
 - Includes a nationally balanced sample of US residents; and
 - Used to determine the incidence of travel nationwide and Maine’s share of that travel.

- This report outlines results from calendar year 2012, with travel occurring between January 2012 and December 2012, and highlights data on **Canadian visitors to Maine**. Reported results are based on:
 - 528 Canadian overnight visitors, and
 - 146 Canadian day visitors.
- Data was collected between January 1st and December 15th 2012. The number of completed statewide surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,497
 - Maine Day Visitor – 1,520
 - National Omnibus Survey – 17,722

Baseline Overnight Visitor Statistics



Overnight Visitor Demographics

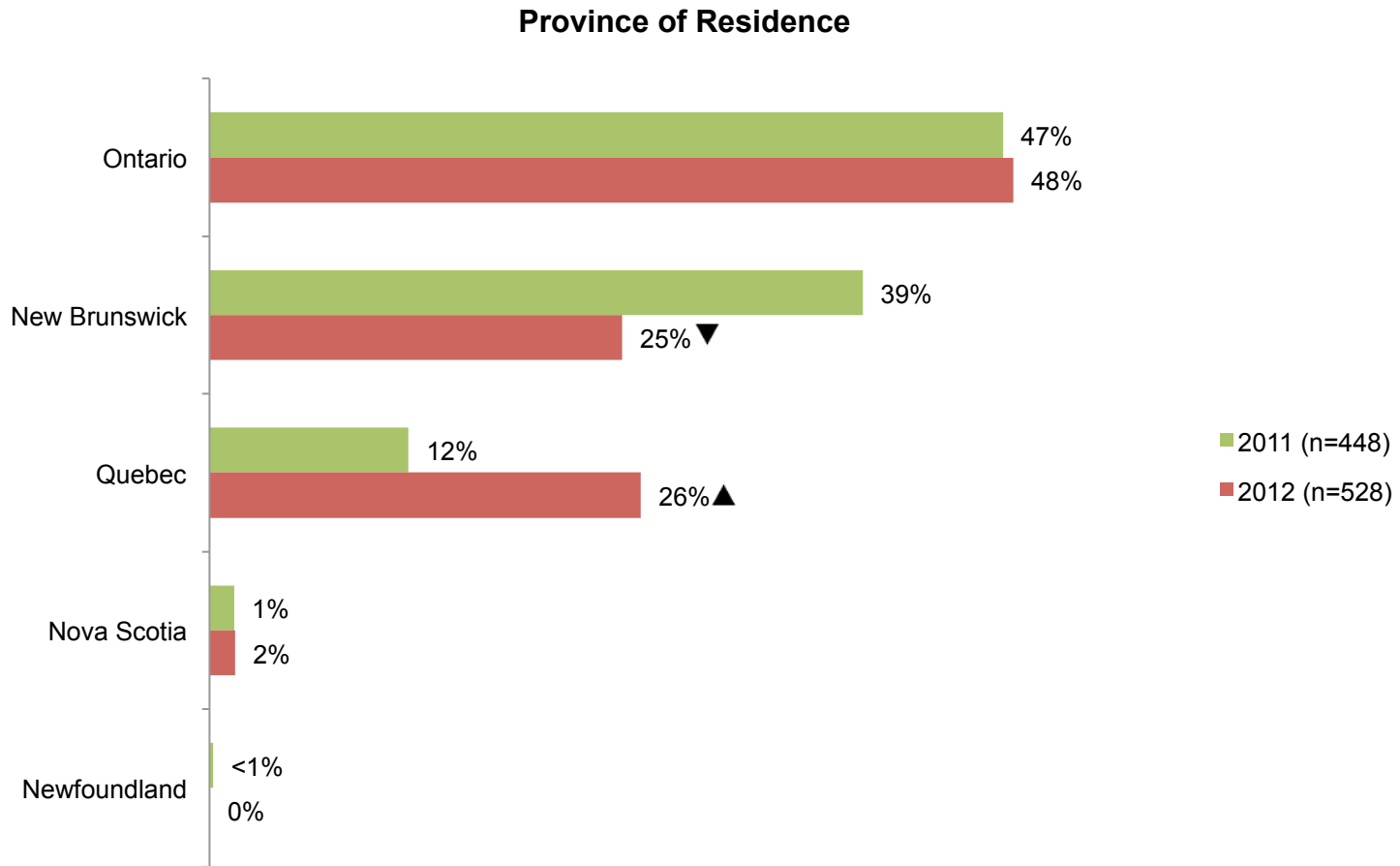
- Canadian visitors to Maine tend to be older than the average U.S. visitor, averaging about 49 years old. In addition, Canadian overnight visitors tend to have a higher household income than those visiting from the U.S.
- In 2012, a higher proportion of Canadian visitors to Maine had a college degree and earned \$100,000 or more annually.

Overnight Canadian Visitors	2011 (n=448)	2012 (n=528)
Age:		
< 35	13%	10%
35 - 44	18%	32%▲
45 - 54	31%	26%
55 +	38%	32%
Mean Age	49.36	49.16
Income:		
< \$50,000	5%	4%
\$50,000 - \$99,000	29%	26%
\$100,000 +	47%	55%▲
Mean Income (In Thousands)	\$122.67	\$127.63
Female	44%	37%
College Degree or Higher	73%	82%▲
Married	72%	67%
Employed Full Time	61%	67%

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Overnight Visitor Residence

- Canadian overnight visitors to Maine are most likely to come from Ontario, New Brunswick, or Quebec provinces. Canadian visitation to Maine appears to have shifted directionally in 2012 with a lesser proportion coming from New Brunswick and a greater proportion coming from Quebec.



State/Province of residence.

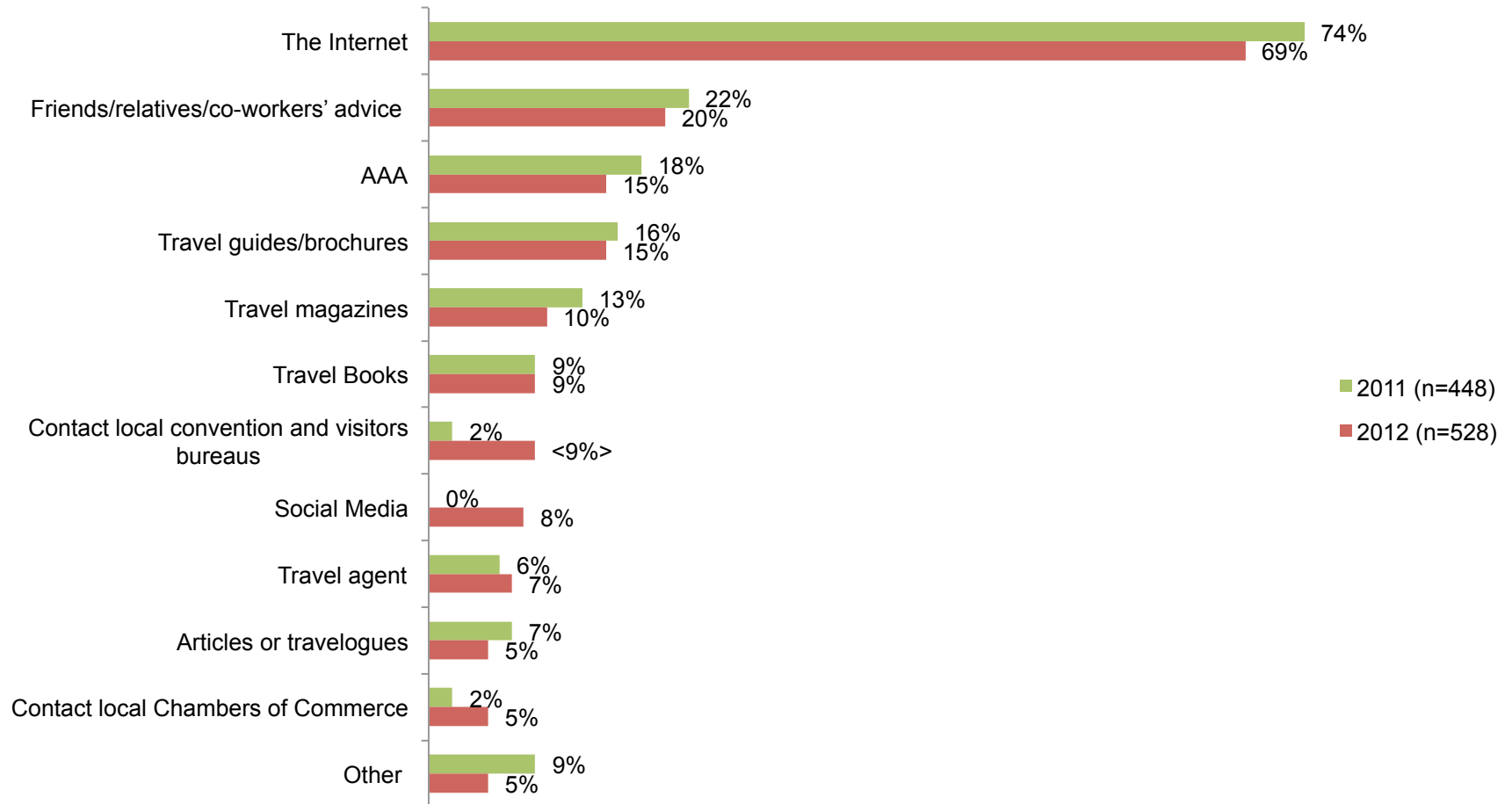
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Overnight Trip Planning



Trip Planning Sources

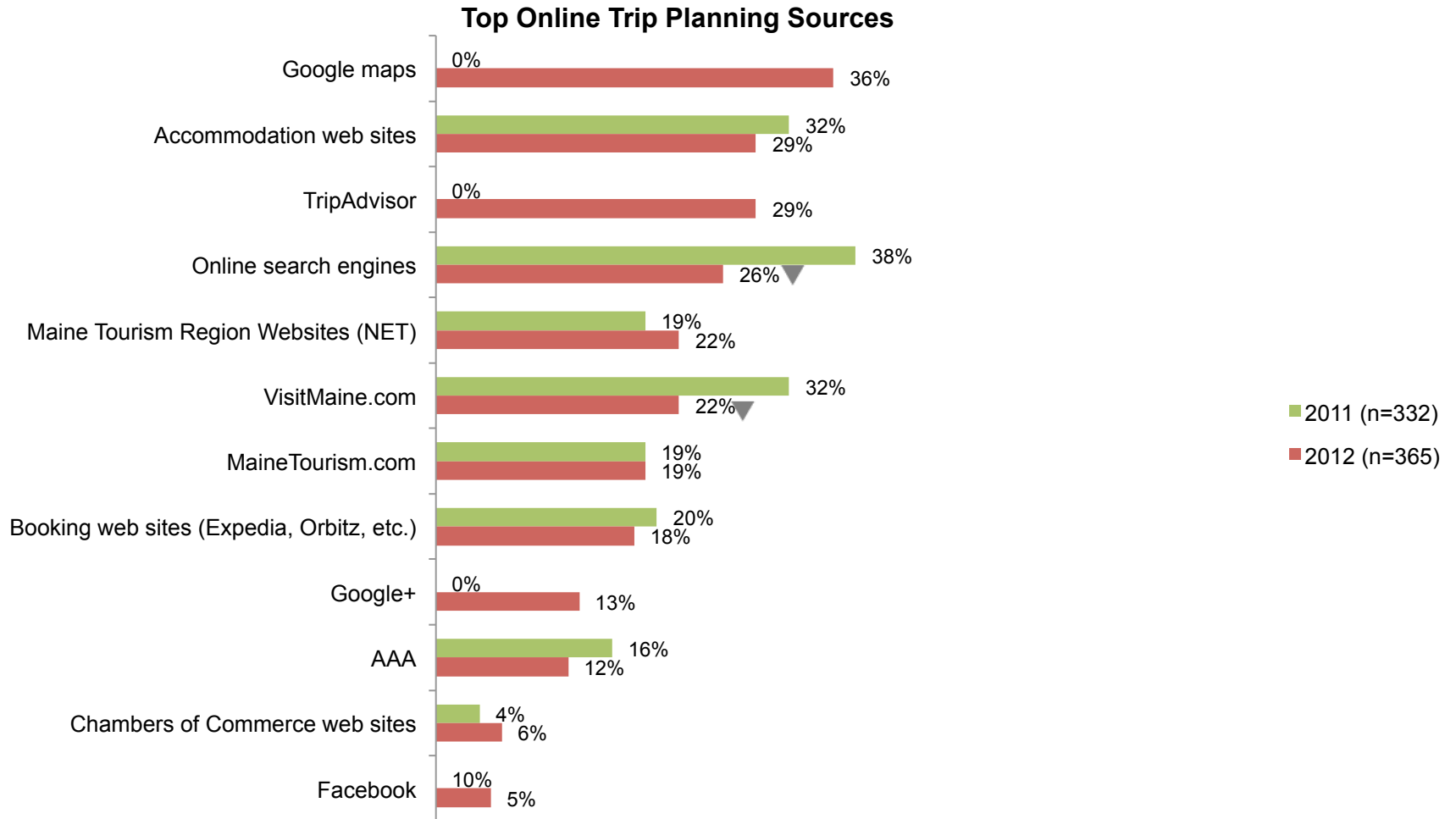
- Similar to US visitors to Maine, Canadian visitors are most likely to have used the Internet when planning their trip. The advice of family and friends is also an important resource, though far less than the Internet.



Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?

Online Trip Planning Sources

- Overall, Canadian visitors who used the Internet to plan their trip to Maine visited a variety of websites. *Google Maps, accommodation web sites, and Trip Advisor* were the most frequented websites for planning their trip. Canadian visitors were more likely than US visitors to consult various accommodation websites.

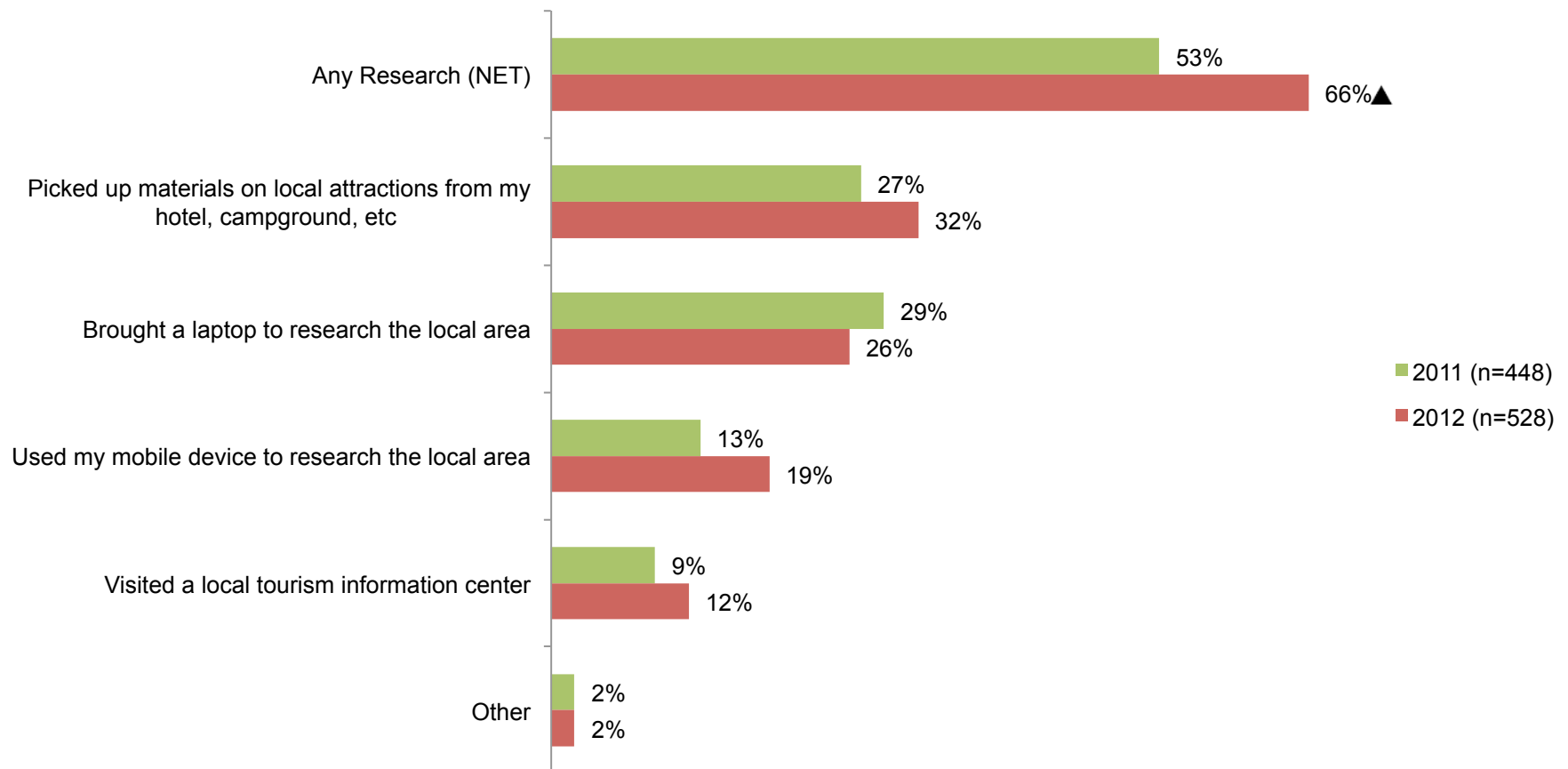


Regional Q18. Which of the following web sites did you visit when planning this trip in Maine?

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Trip Research While in Maine

- In 2012, a greater proportion of Canadian visitors continued to research places to go and things to do once they had arrived in Maine than in 2011. Overall, the type of research they did while here was similar to US visitors. The one exception where Canadians were more likely than US visitors to do was *picking up materials on local attractions from my hotel, campground, etc.*



Regional Q31d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

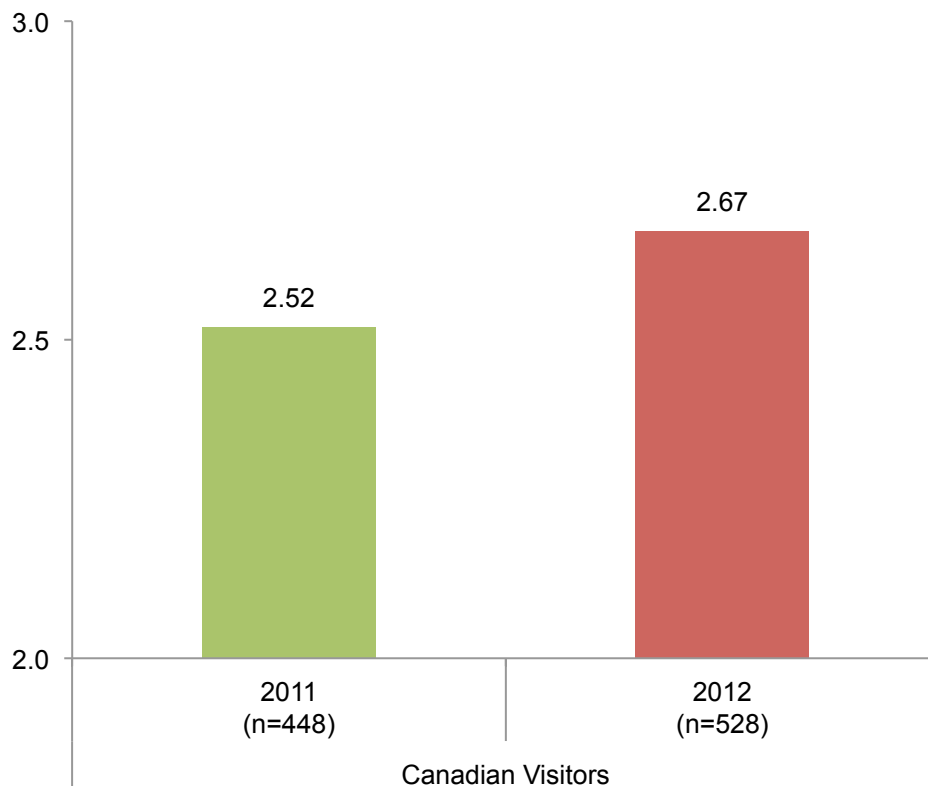
Overnight Visitor Travel Logistics



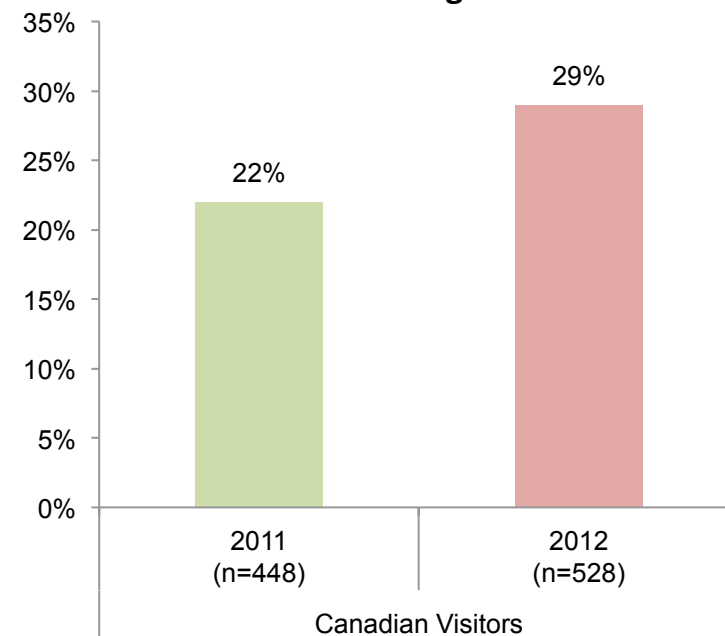
Travel Party Size and Composition

- Travel party size is similar between Canadian and US visitors, at about 2-3 people. Canadians, however, are more likely to be traveling with children (29%) than are US visitors (20%).

Mean Number of People in Travel Party



Percent Traveling with Children



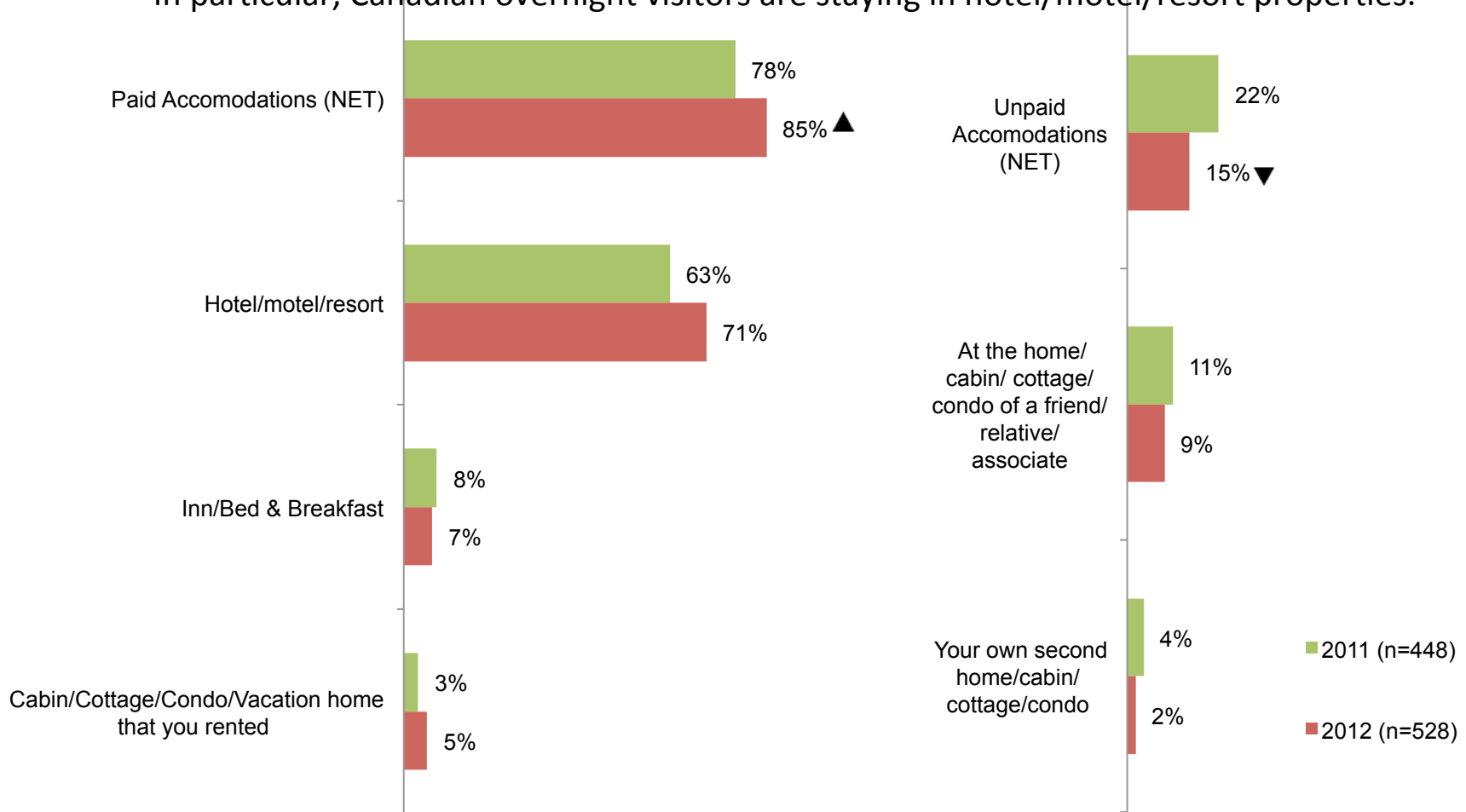
Regional Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Regional Q25. How many of these people were: Children?

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Accommodations While in Maine

- Canadian visitors are more likely than U.S. visitors to stay in paid accommodations, with more than 4 out of 5 utilizing some form of paid lodging. This represents an even greater proportion staying in paid accommodations than in 2011.
- In particular, Canadian overnight visitors are staying in hotel/motel/resort properties.



Regional Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

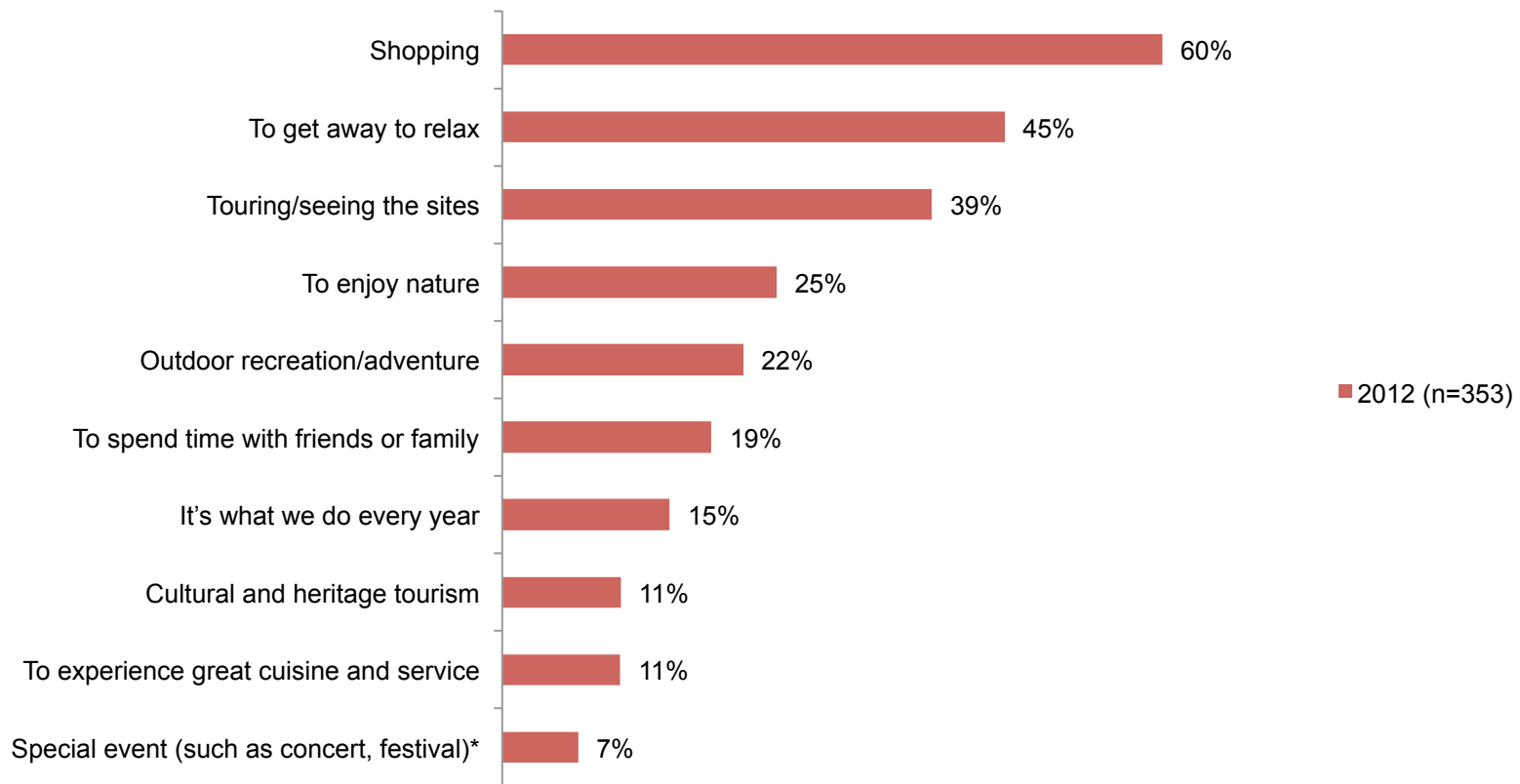
Overnight Visitor Experience



Primary Purpose of Overnight Leisure Trips

- More than one-half of Canadian overnight visitors are looking to take advantage of the convenient access to the U.S. market by visiting Maine in order to *shop*. This proportion coming to Maine primarily for shopping is nearly double that of US visitors.
- A sizable proportion of Canadian visitors are coming to Maine *to get away to relax* and *to tour/see the sites*.

Primary Purpose of Overnight Leisure Trips

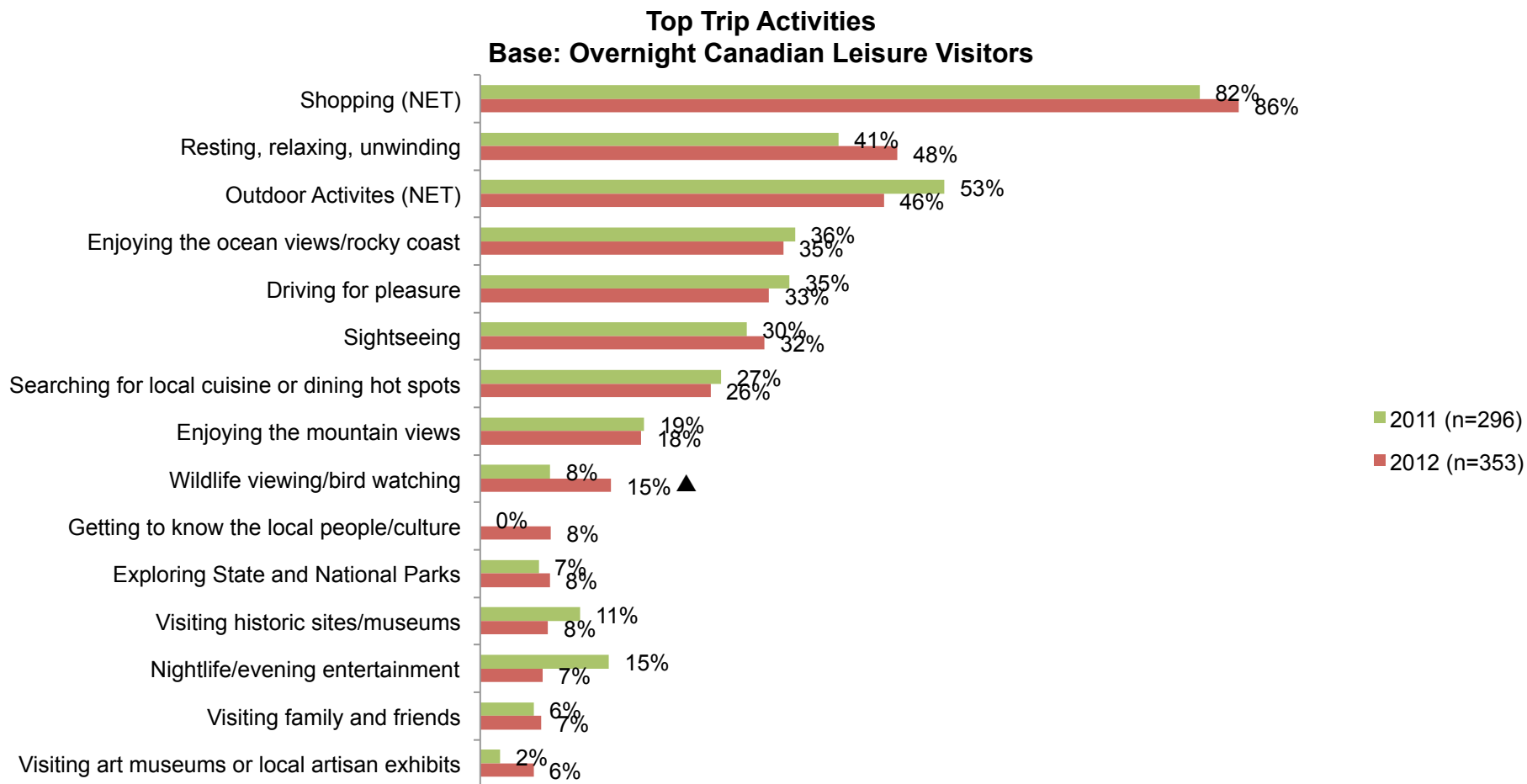


Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?

*Includes Wedding before 06/2012. Due to the revision in answer options in 2012, direct comparisons between 2011 and 2012 data can not be made.

Overnight Leisure Trip Activities

- As mentioned earlier, shopping is a major activity for Canadian leisure visitors, followed by *resting/relaxing/unwinding* and various *outdoor activities*.



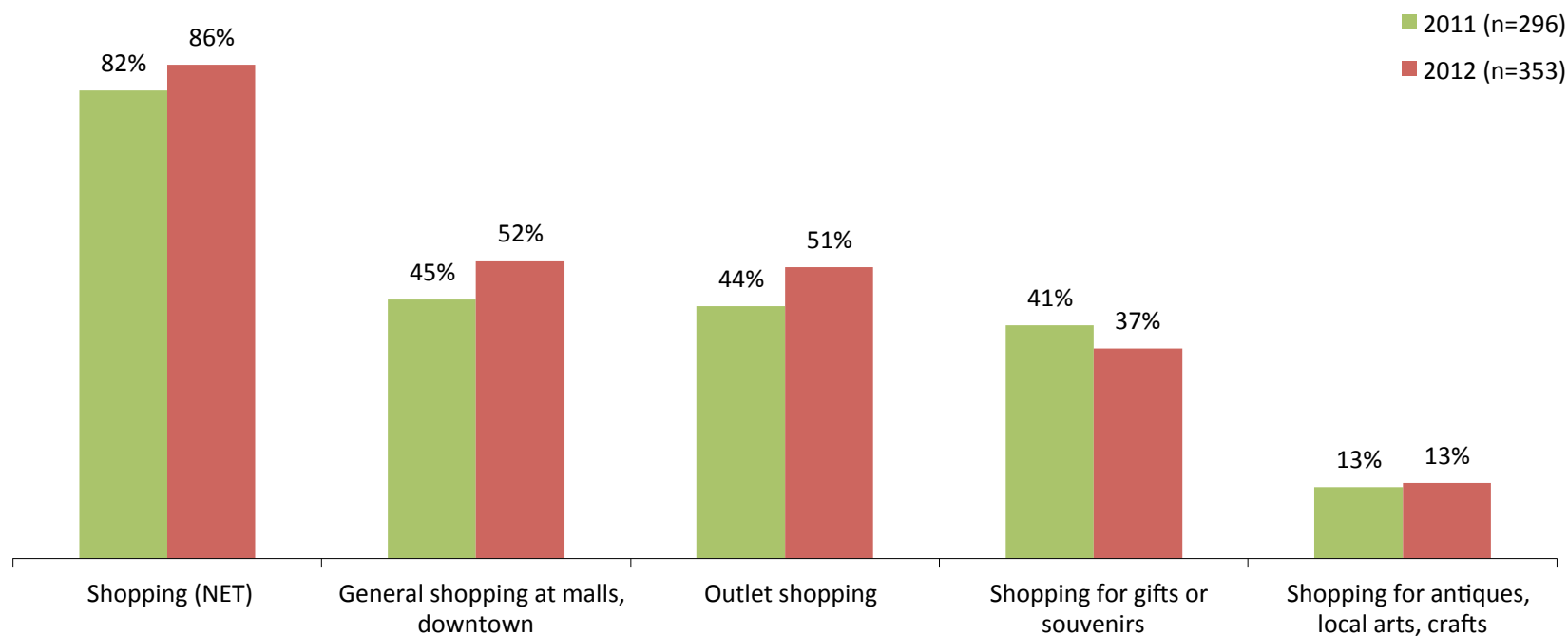
Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Overnight Leisure Trip Activities: *Shopping*

- Among shopping options, Canadian visitors are most likely to engage in *general shopping in the malls and downtown areas*, as well as hitting the *outlets*.

Top Trip Activities – Shopping
Base: Overnight Canadian Leisure Visitors



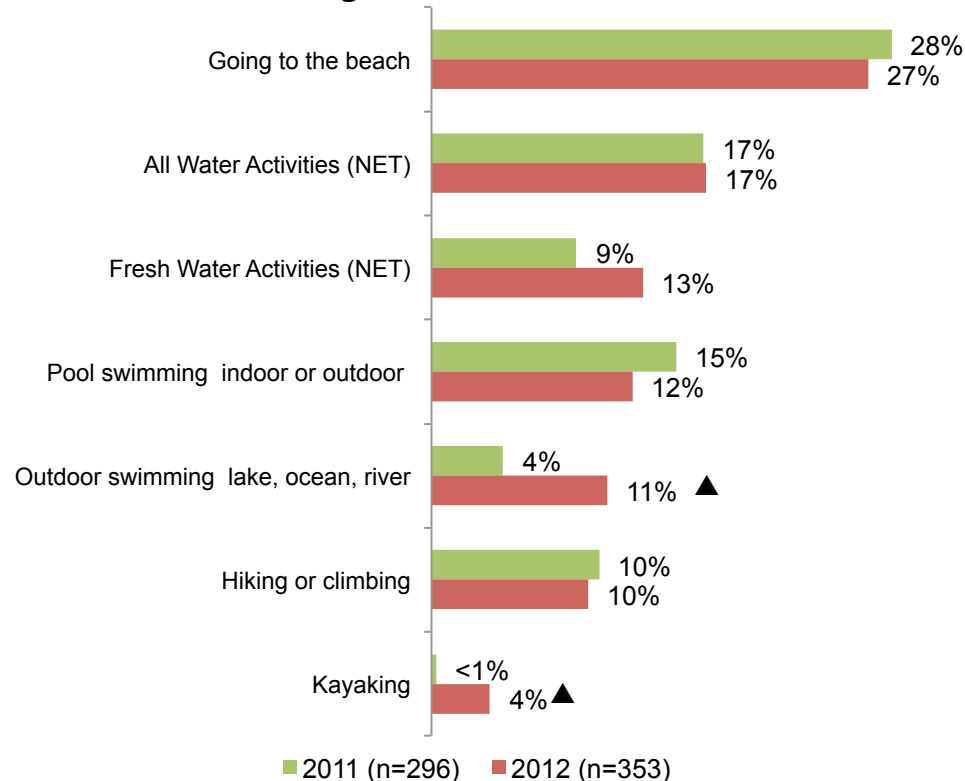
Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)

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Overnight Leisure Trip Activities: *Outdoor Activities*

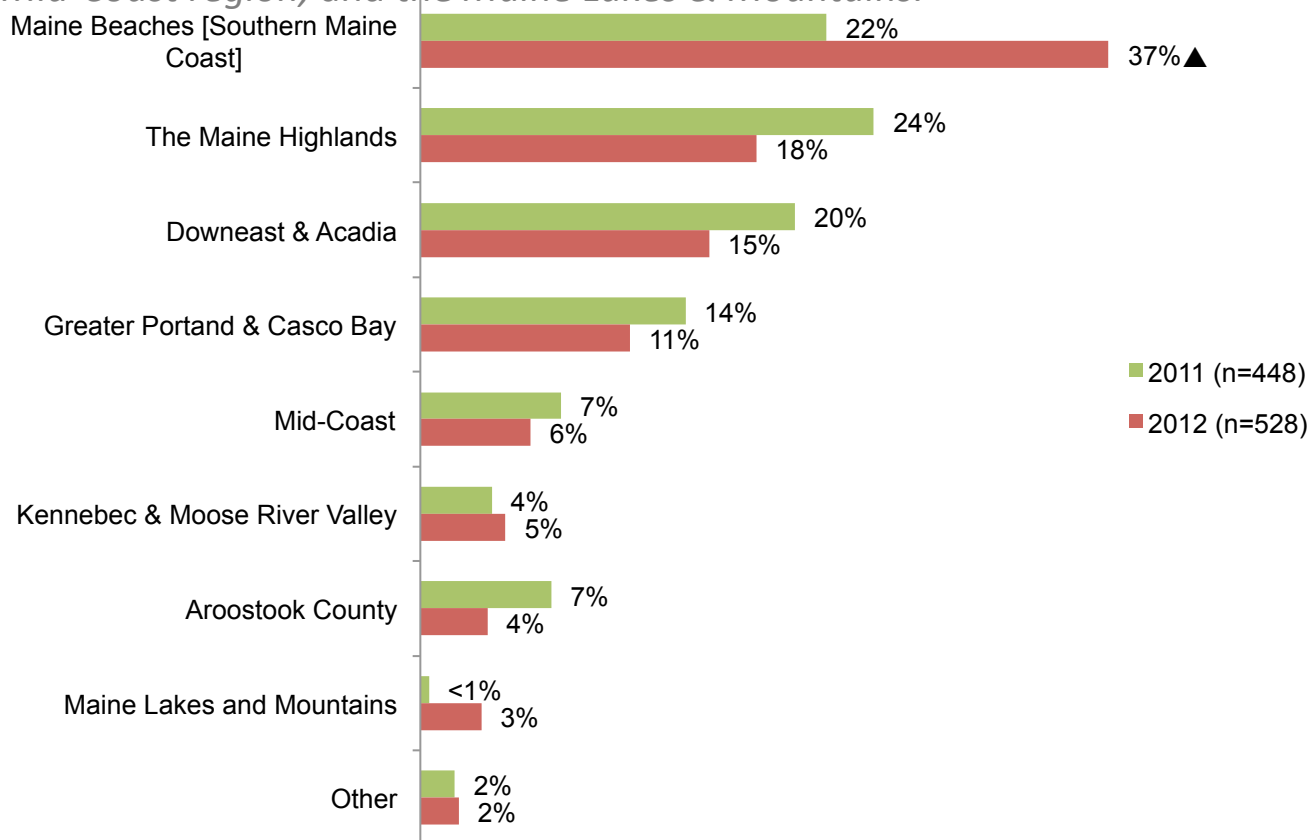
- Though less likely than US visitors to participate in outdoor activities overall, Canadian overnight visitors who do spend time enjoying the outdoors like to take advantage of Maine's beaches and other water activity opportunities, including swimming. They are also likely to do some hiking or climbing.

Top Trip Activities – Outdoor Activities
Base: Overnight Canadian Leisure Visitors



Primary Region of Visit to Maine

- Canadian overnight visitors can be found in all regions of Maine, with the *Maine Beaches* the most visited region, following by *The Maine Highlands* and *Downeast & Acadia*.
- Canadian visitors differ from US visitors in the regions they primarily visit, with Canadians more likely than Americans to spend time in the *Maine Beaches* and *The Maine Highlands* and less likely than Americans to visit *Greater Portland & Casco Bay*, *the Mid-Coast region*, and the *Maine Lakes & Mountains*.



Regional Q28. What region in Maine was your primary destination?

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Baseline Day Visitor Statistics



Day Visitor Demographics

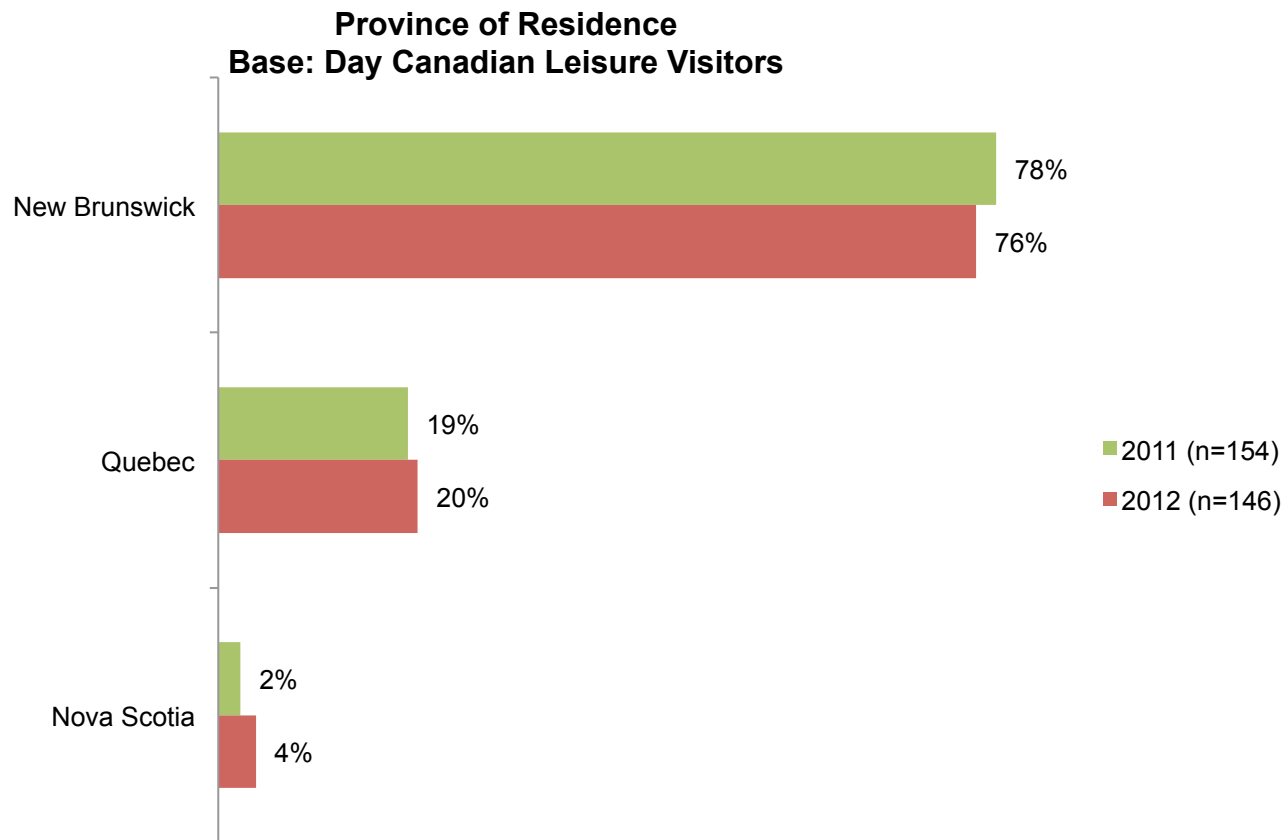
- As with overnight visitors, Canadian day visitors tend to be older than their American counterparts.

Canadian Day Visitors	2011 (n=154)	2012 (n=146)
Age:		
< 35	9%	10%
35 - 44	17%	23%
45 - 54	27%	14%▼
55 +	47%	53%
Mean Age (Years)	51.96	52.65
Income:		
< \$50,000	10%	14%
\$50,000 - \$99,000	47%	41%
\$100,000 +	43%	45%
Mean Income (Thousands)	\$109.76	\$101.86
Female	44%	36%
College Degree or Higher	69%	72%
Married	77%	78%
Employed Full Time	55%	52%

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Day Visitor Residence

- The majority of Canadian day visitors are from New Brunswick, followed by Quebec and Nova Scotia.

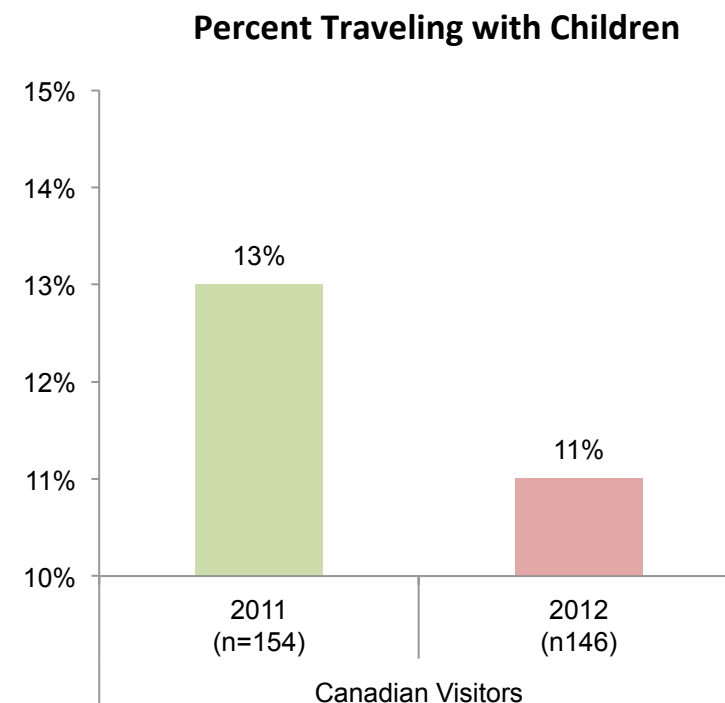
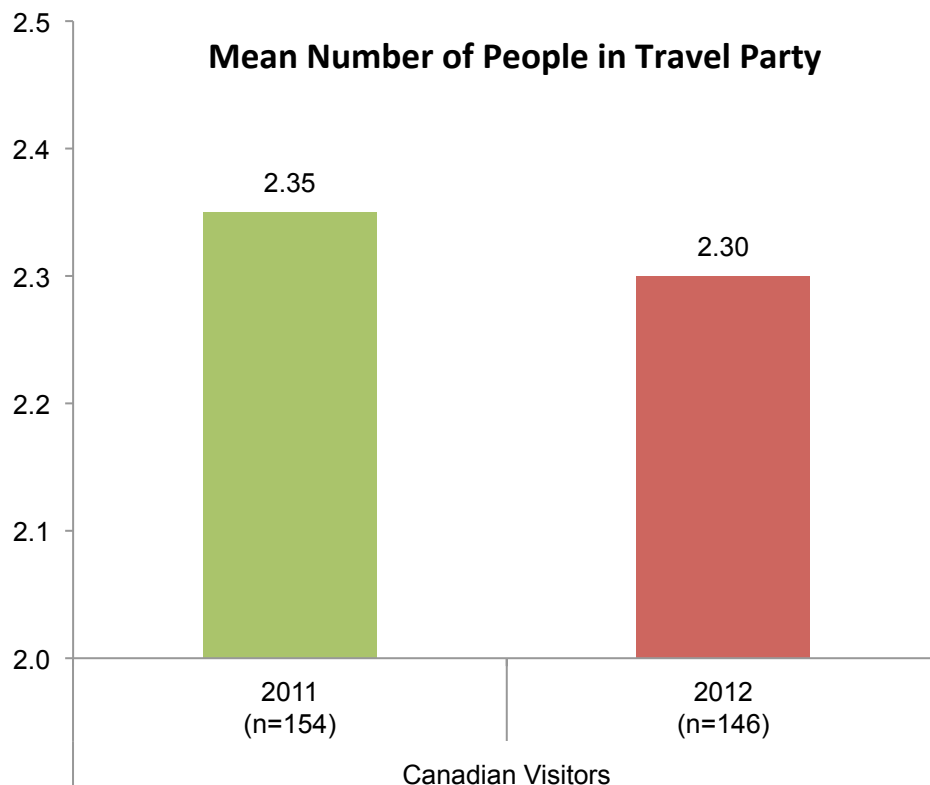


Day Visitor Travel Logistics



Travel Party Size and Composition

- Travel party size is similar between Canadian and US visitors to Maine, between 2 and 3 people per travel party. The proportion of Canadian day visitors traveling with children, however, is lower than the same proportion for US visitors (11% of Canadian day visitors versus 18% of US day visitors).



Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q8. How many of these people were: Children

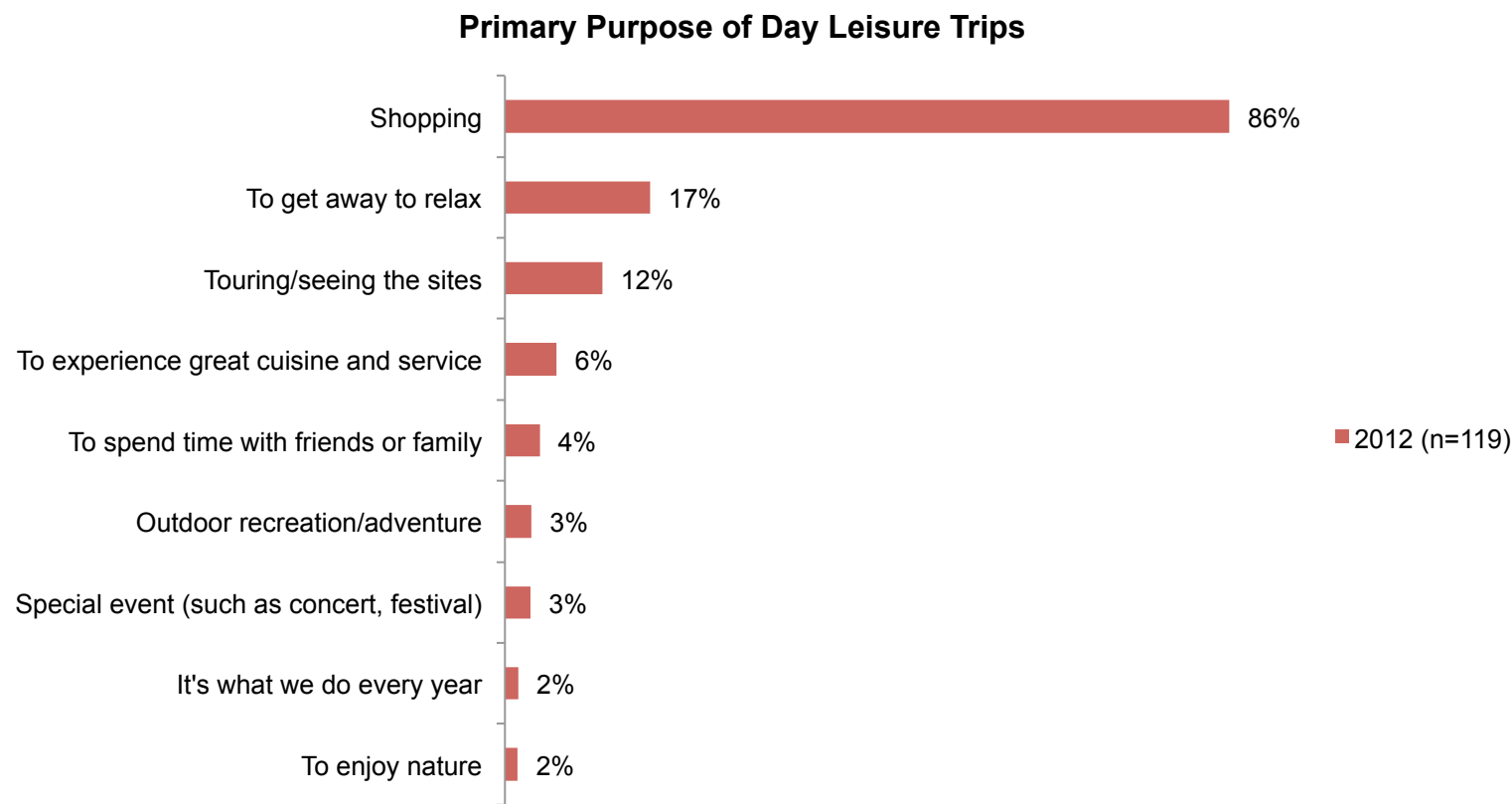
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Day Visitor Experience



Primary Purpose of Day Leisure Trips

- Not surprisingly, the vast majority of Canadian day trippers travel to Maine in order to shop, a proportion twice as high as for US leisure day visitors.

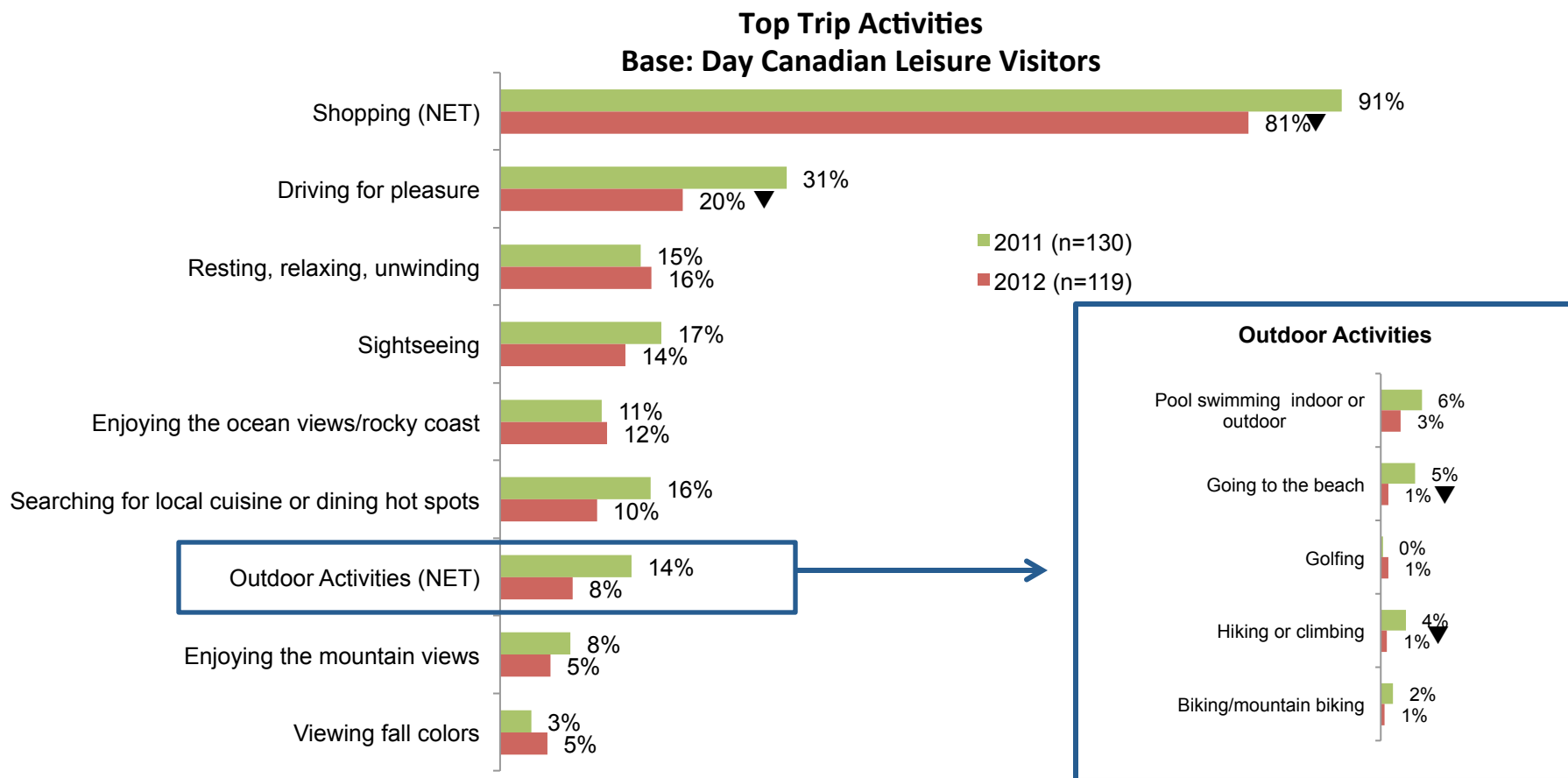


Day Q3. What was the primary purpose of your most recent leisure trip in Maine?

*Due to a revision in answer options in 2012, direct comparisons between 2011 and 2012 data can not be made. 27

Day Leisure Trip Activities

- Similar to Canadian overnight visitors, shopping dominates the list of activities engaged in by Canadian day visitors.



Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Day Leisure Trip Activities: *Shopping*

- While on their day trips to Maine, Canadians mostly engage in general shopping at malls/downtown. Though reported general/mall shopping is down versus last year among Canadian day visitors, it has returned to levels seen in prior years.

Top Trip Activities - Shopping

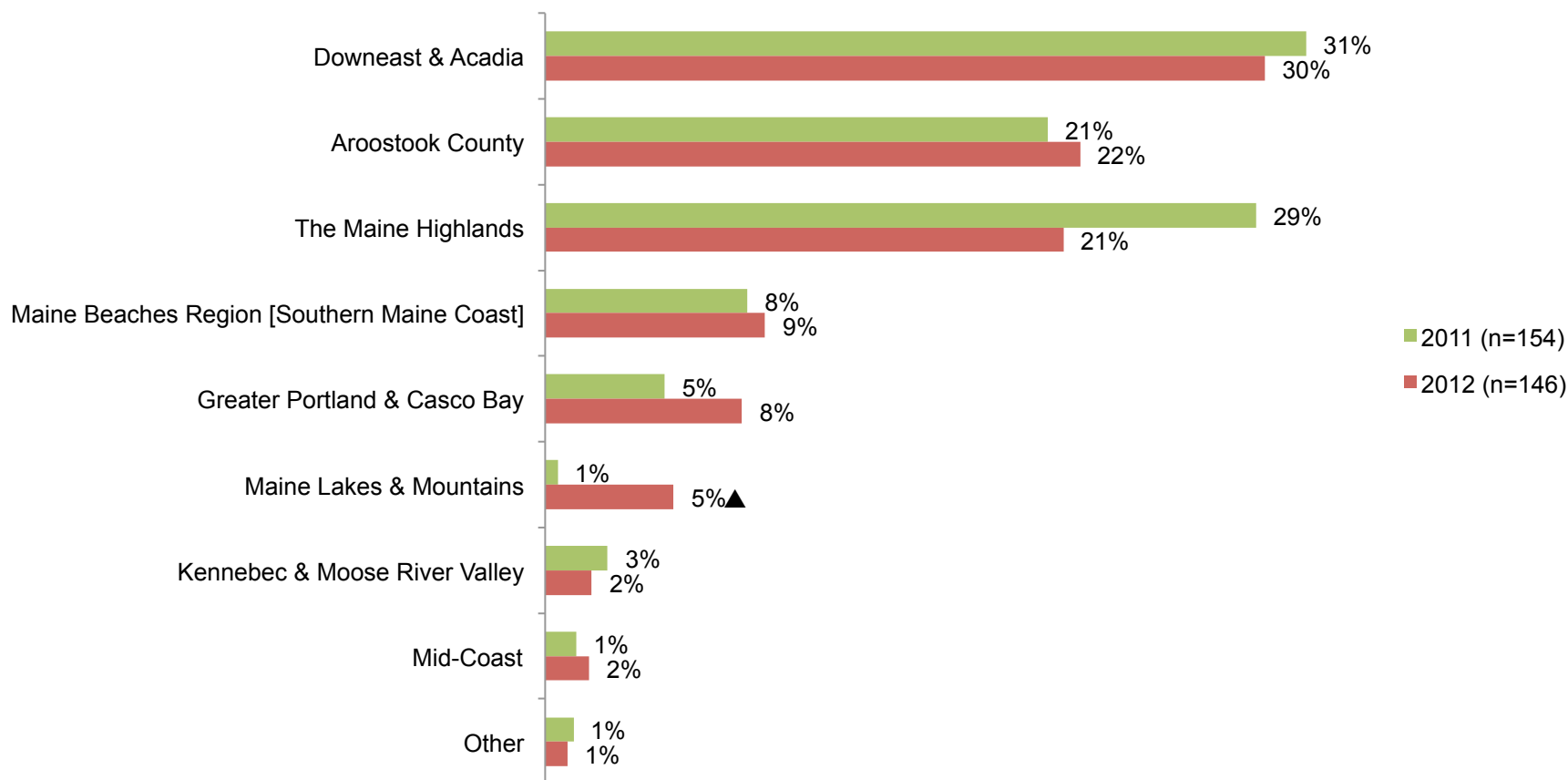


Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply)

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Primary Region of Visit to Maine

- Canadian day trippers are most likely to spend their day in *Downeast & Acadia*, *Aroostook County*, or *The Maine Highlands*, with three-fourths visiting one of those three regions.
- Differing significantly from US day visitors in the regions they frequent, Canadians are more likely to visit *Downeast*, *Aroostook County*, and *The Maine Highlands* and less likely to visit the remaining five tourism regions.



Day Q11: What region in Maine was your primary destination on your most recent trip?

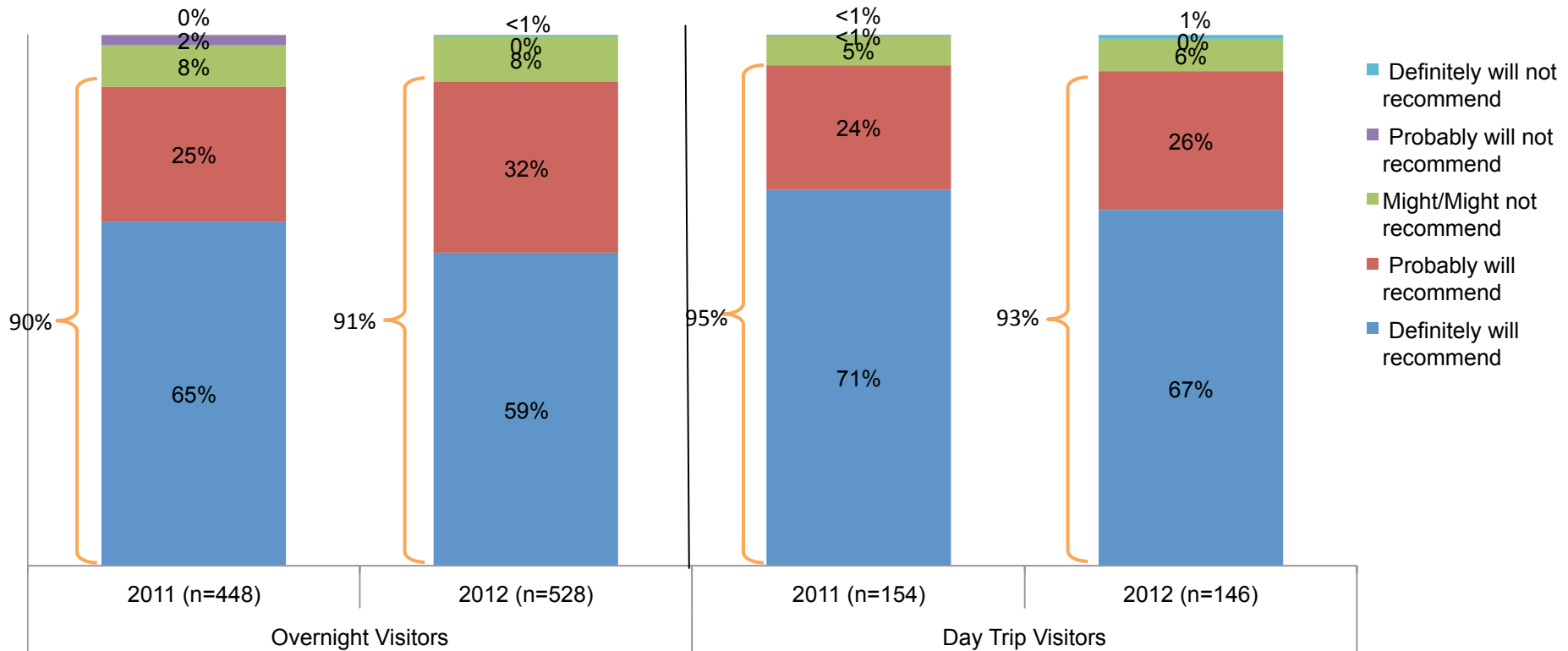
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Future Travel and Recommendation



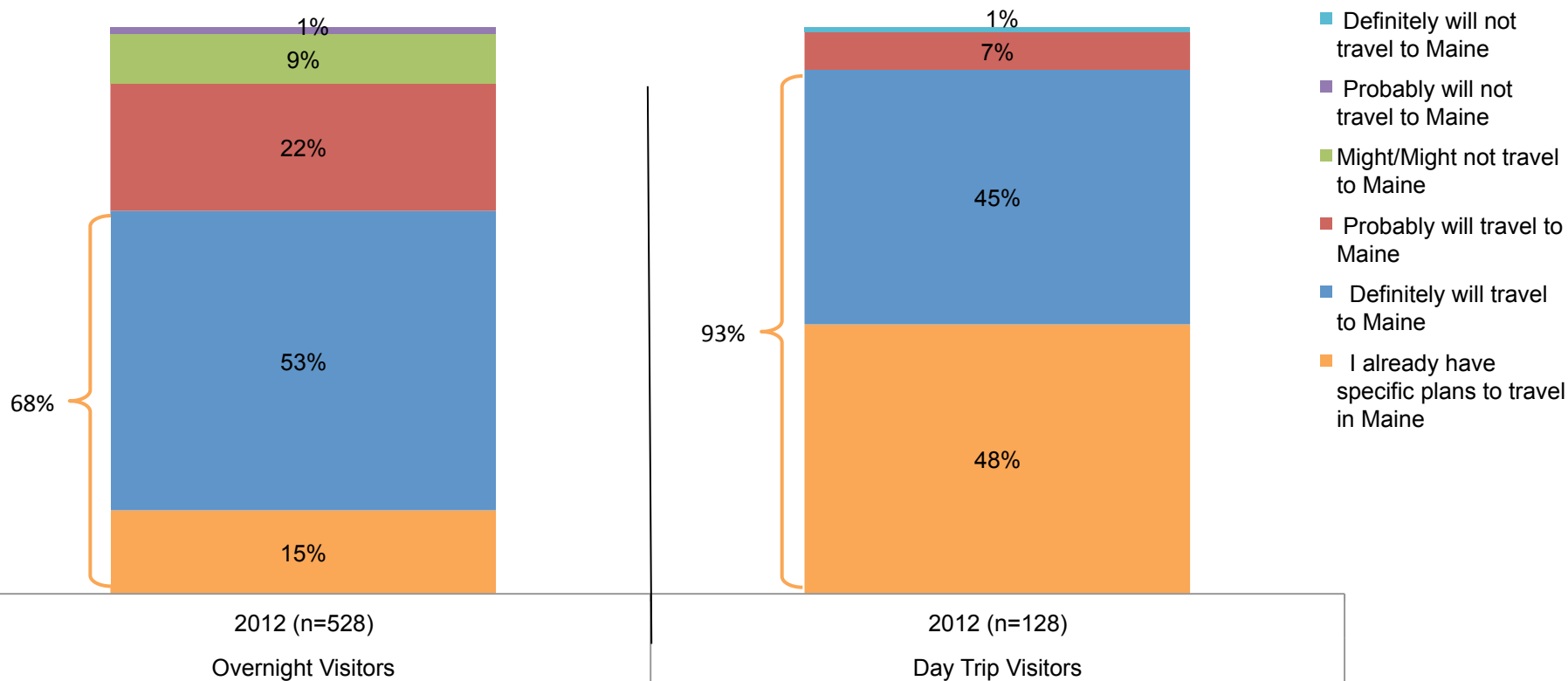
Likelihood to Recommend Maine

- As with their U.S. counterparts, Canadian visitors are likely to recommend Maine as a travel destination to their friends and family.



Future Travel in Maine

- Two-thirds of Canadian overnight visitors and 93% of day visitors indicated that they either *already have specific plans to travel in Maine in the next two years* or that they *definitely will travel in Maine in the next two years*.





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