

**Maine Office of Tourism
Visitor Tracking Research
2014 Calendar Year Annual Report**

***First Time and Repeat Visitors:
A Comparison***

Prepared by



June 2015

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Introduction and Methodology



Research Objectives 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 two national online panels – Research Now and Instantly (formerly Usamp).
- Information is gathered on an ongoing basis through three surveys:
 - **Maine Overnight Visitor Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada
 - Have taken an overnight trip to Maine in the past four weeks
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders
 - 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
 - Used to determine the incidence of travel nationwide and Maine’s share of that travel

Research Objectives and Methodology

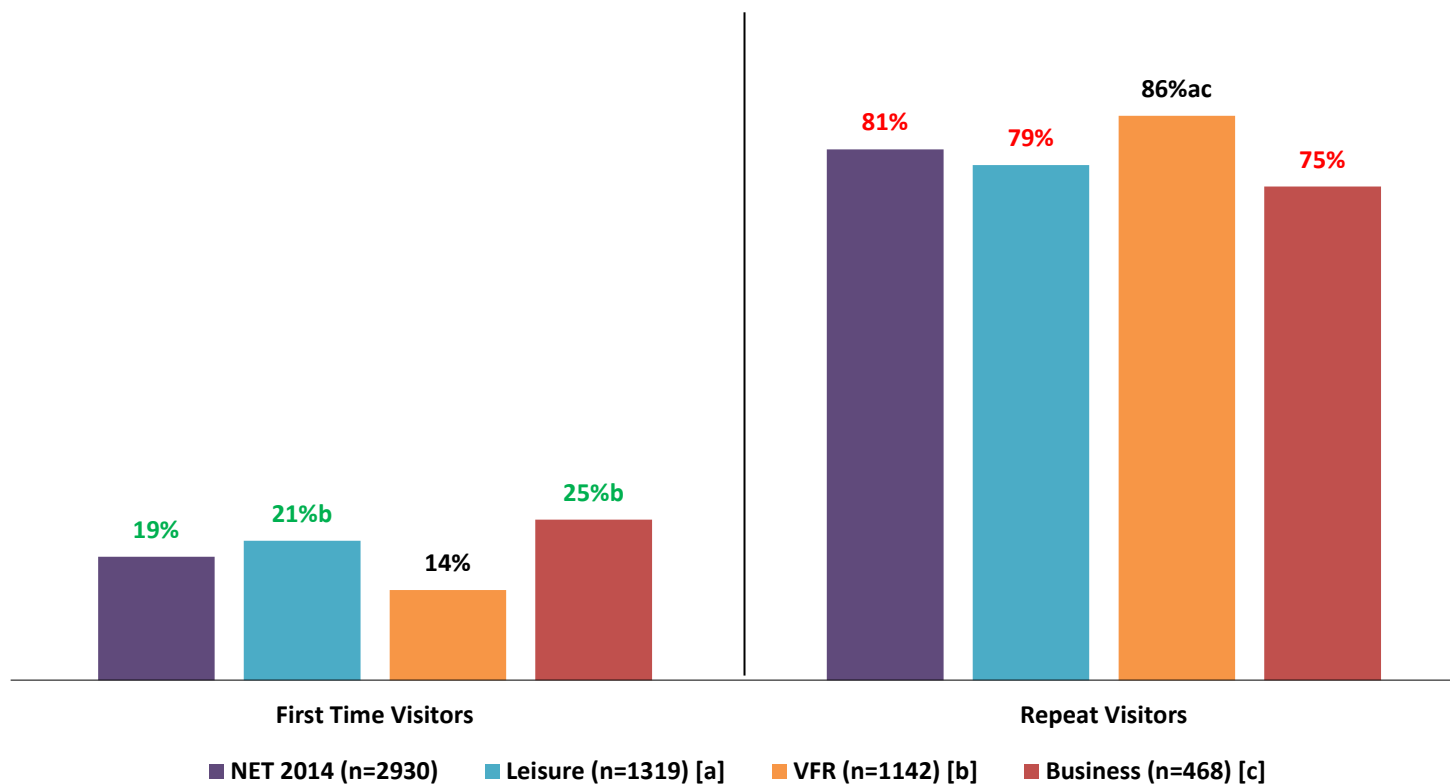
- Survey results were collected during calendar year 2014. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,930
 - Maine Day Visitor – 1,733
 - National Omnibus Survey – 17,675
- This report outlines results from calendar year 2014, with travel occurring between January 2014 and December 2014, and highlights data on **first-time visitors to Maine**. Reported results are based on:
 - 553 first-time overnight visitors, and
 - 95 first-time day visitors.
- Statistically significant differences between 2013 and 2014 are highlighted for first-time visitors to 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.
- Statistically significant differences between first-time visitors and repeat visitors are indicated by < > on the significant data.

First-Time Overnight Visitors: *Traveler Description*



First-time visitors comprise one in five overnight visitors to Maine in 2014, a significant increase over the prior year.

- Leisure and business travelers are more likely to be visiting Maine for the first time, while those visiting friends and relatives are more likely to be repeat visitors.



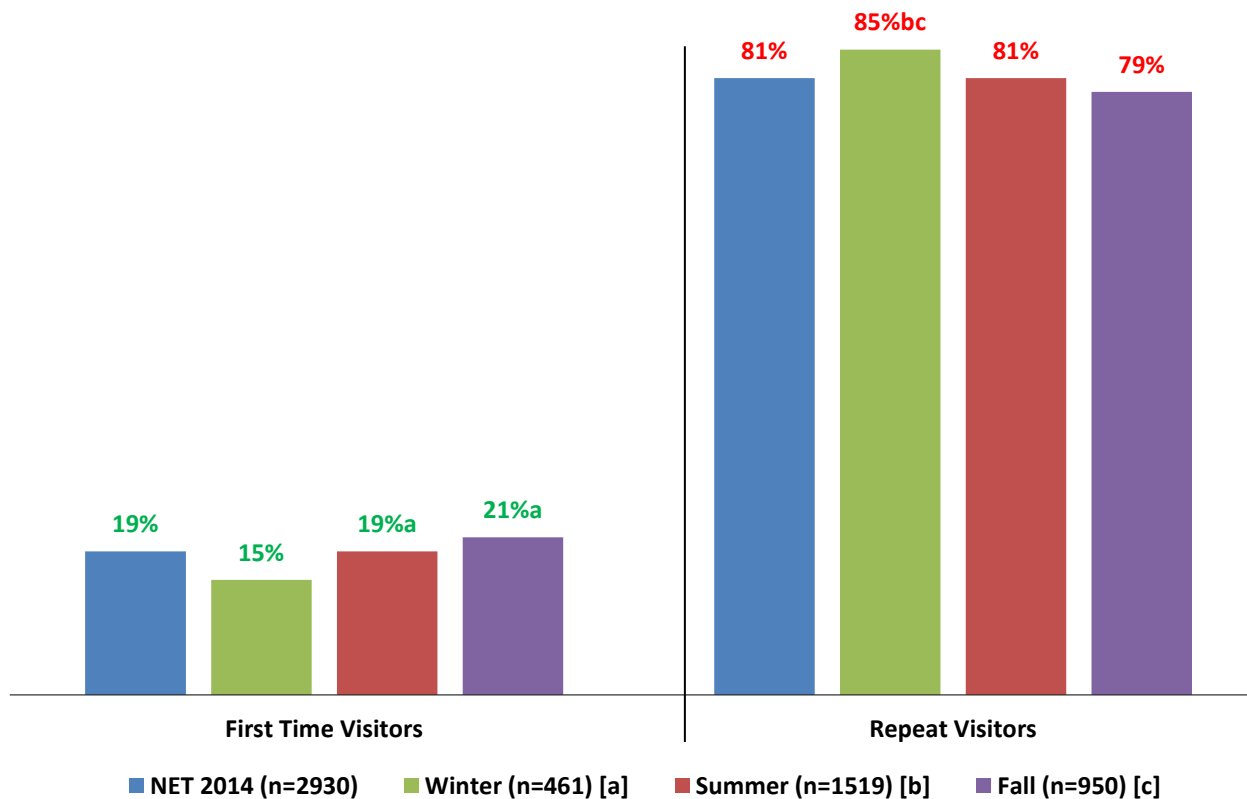
Q11. Was this your first visit in Maine?

a, b, c indicates significant difference 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.

Seasonal differences can be seen in the proportion of first-time and repeat visitors.

- Seasonal patterns illustrate a modest contrast in the proportion of first-time and repeat visitors, with first-time visitors being slightly more prevalent during the summer and fall months and repeat visitors being more prevalent during the winter.



Q11. Was this your first visit in Maine?

a, b, c indicates significant difference 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.

Overnight Visitor Demographics

- The demographic profile of first-time and repeat overnight visitors to Maine differs on a few points. First-time visitors are younger, less likely to be married, and more likely to be employed full-time than are repeat overnight visitors.

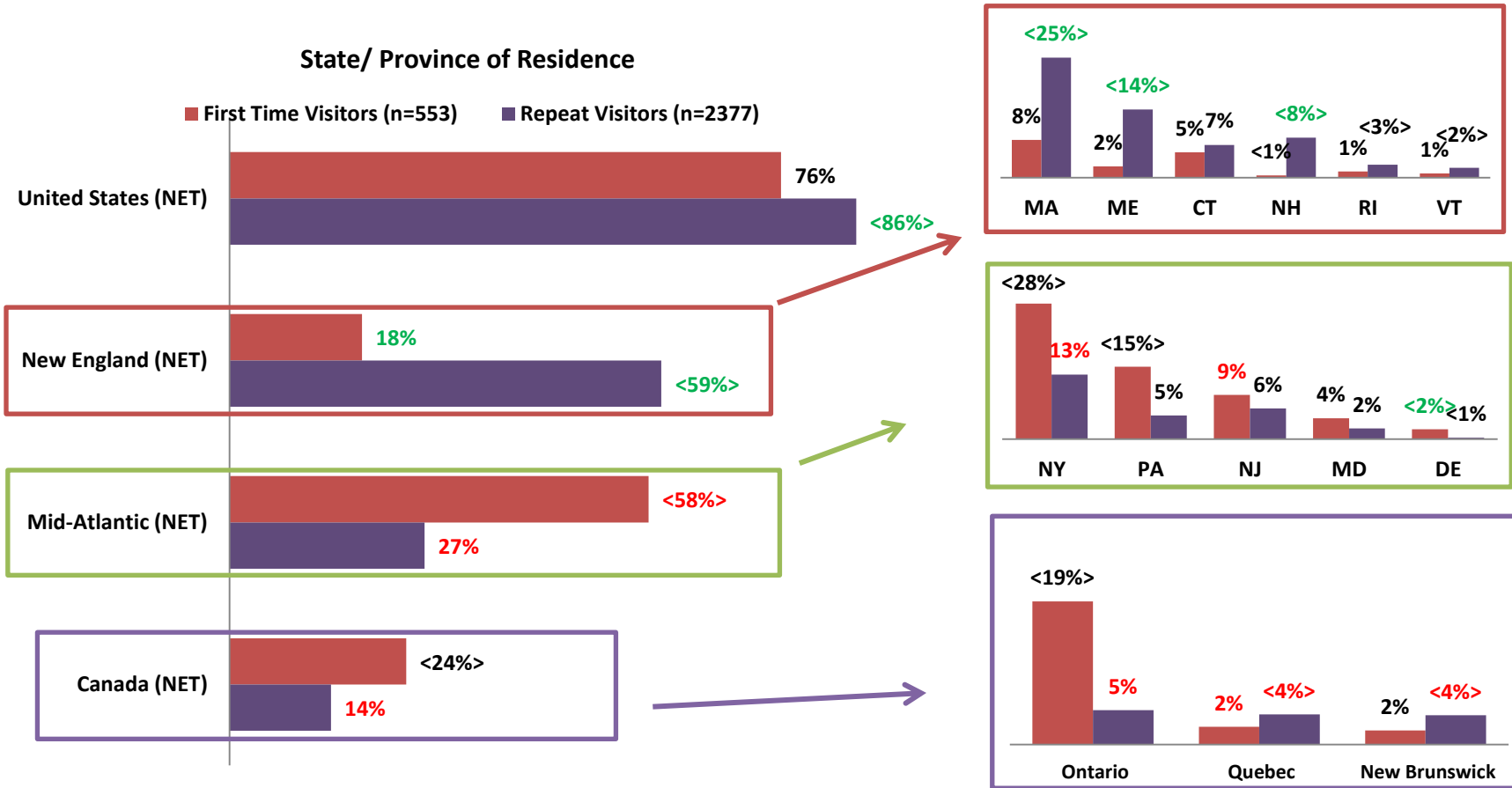
2014 Overnight Visitors	First Time Visitors (n=553)	Repeat Visitors (n=2377)
Age:		
< 35	<47%>	25%
35 - 44	<24%>	18%
45 - 54	19%	21%
55 +	10%	<37%>
Mean Age (Years)	37.6	<47.2>
Income:		
< \$50,000	17%	16%
\$50,000 - \$99,000	45%	38%
\$100,000 +	38%	<46%>
Mean Income (Thousands)	\$98,320	<\$108,110>
Female	56%	53%
College Degree or Higher	69%	<75%>
Married	61%	<67%>
Employed Full Time	<70%>	60%

<> indicates a significant difference between subgroups 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.

Three-fourths of first-time visitors are from the U.S., and predominantly from the Mid-Atlantic region.

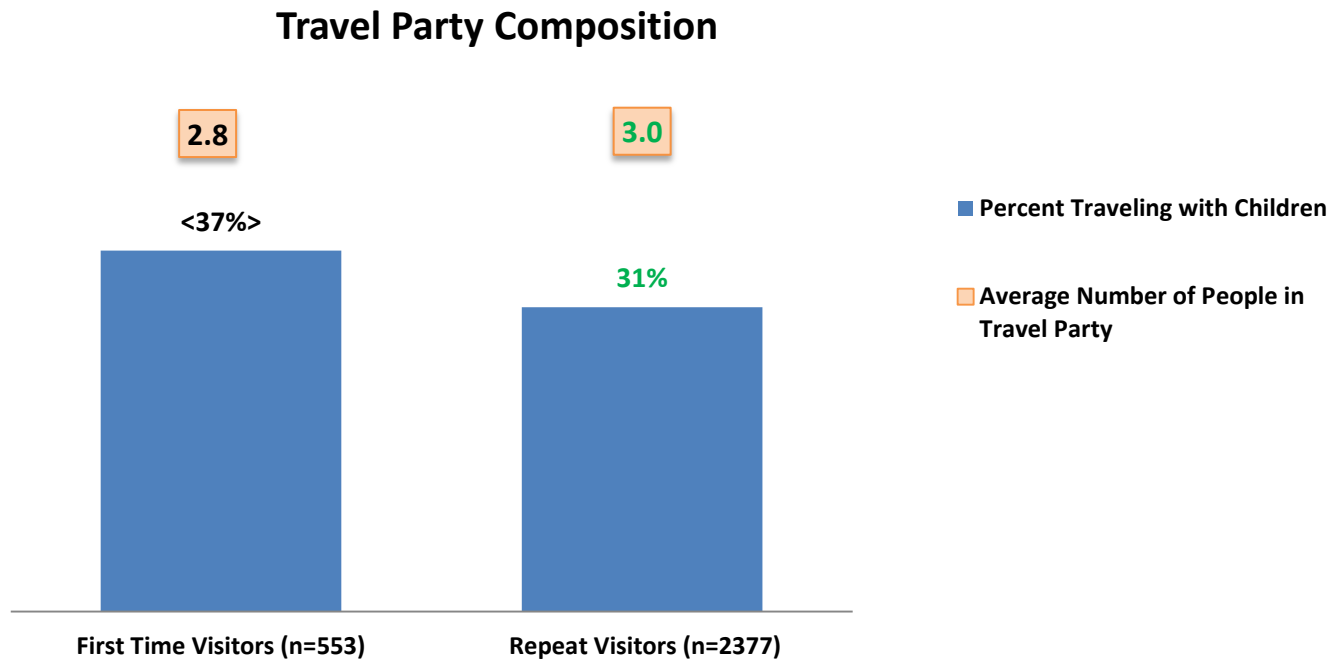
- Overnight visitors from New England are more likely to be repeaters, while overnight visitors from the Mid-Atlantic states are more likely to be first-timers.
- First-time overnight visitors from Canada are most likely to be from Ontario.



State/ Province of Residence

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
<> indicates a significant difference between subgroups at the 95% confidence level.

More than one-third of first-time visitors are traveling with children, a significantly higher proportion when compared with repeat visitors.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q19. How many of these people were: Children?

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

<> indicates a significant difference between subgroups at the 95% confidence level.

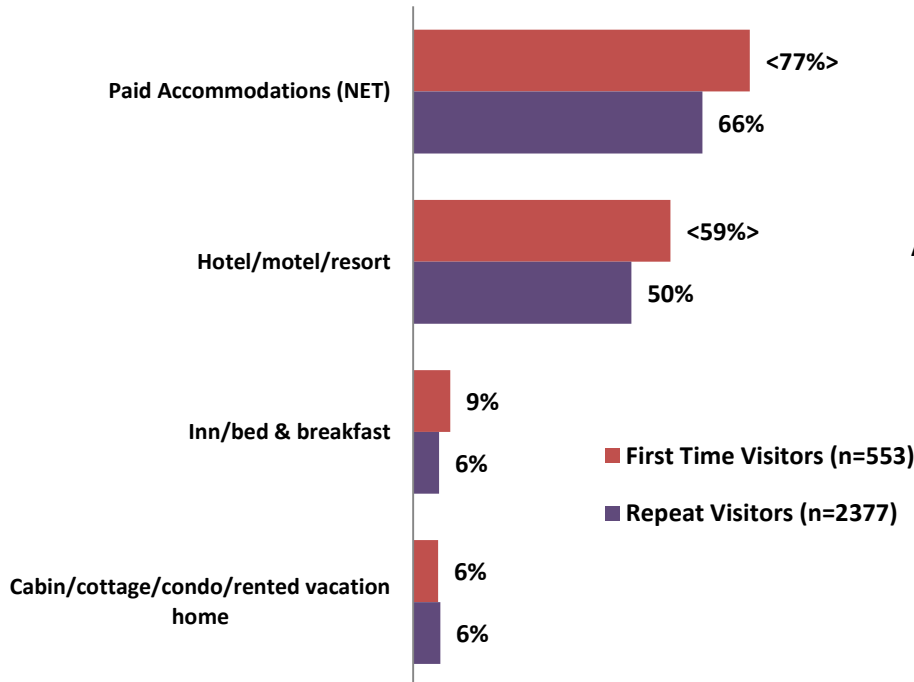
First-Time Overnight Visitors: *Trip Experience*



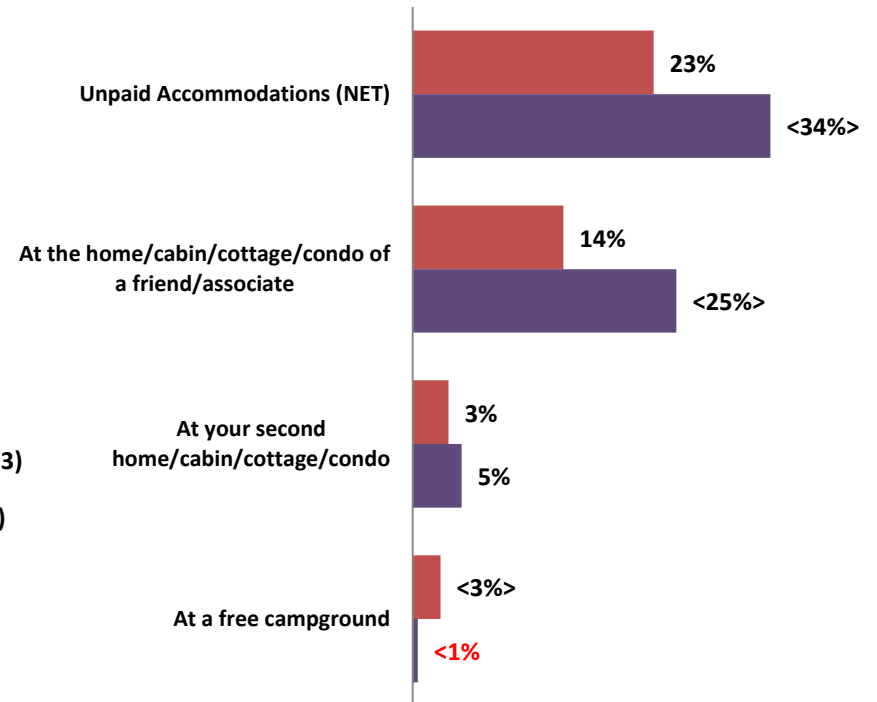
Three-fourths of first-time visitors stayed in paid accommodations while visiting Maine.

- First-time visitors are more likely than repeat visitors to stay in paid accommodations while vacationing in Maine, specifically at a hotel/motel/resort.

Paid Accommodations



Unpaid Accommodations



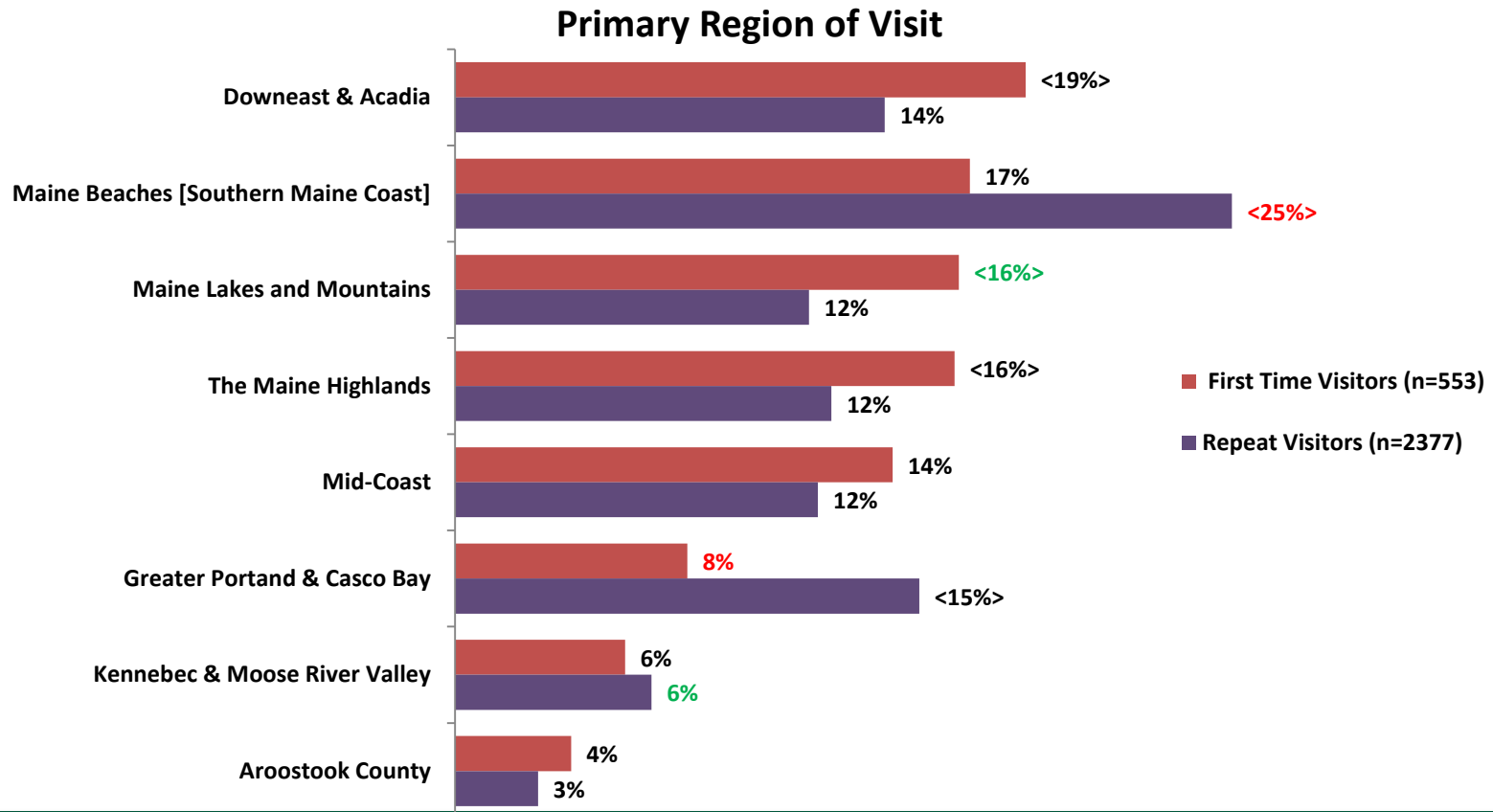
Q21. In which of the following types of accommodations did you spend the most nights on this trip in Maine?

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

< > indicates a significant difference between subgroups at the 95% confidence level.

First-time overnight visitors are most likely to be visiting the Downeast & Acadia region.

- The *Maine Beaches, Maine Lakes & Mountains, Maine Highlands, and Mid-Coast* regions are the next most frequently visited regions by first-time visitors.
- First-time visitors are more likely than repeat visitors to visit *Downeast & Acadia, the Maine Lakes & Mountains, and the Maine Highlands* regions. However, repeat visitors are more likely to be heading to the *Maine Beaches* or the *Greater Portland & Casco Bay* regions.



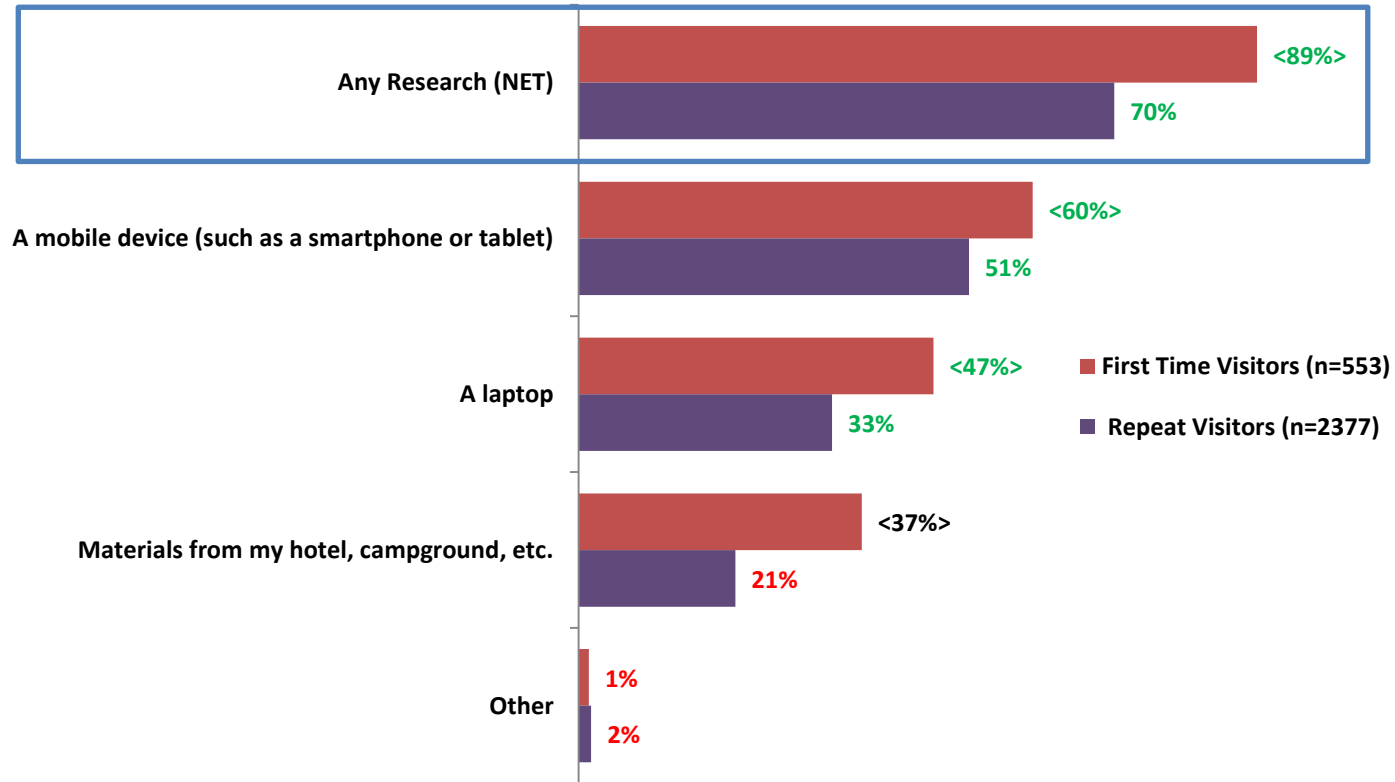
Q22. What region in Maine was your primary destination? (Please check all that apply).

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

< > indicates a significant difference between subgroups at the 95% confidence level.

Nine in ten first-time visitors continue to research Maine during their trip, a significantly higher proportion than repeat visitors.

Trip Research

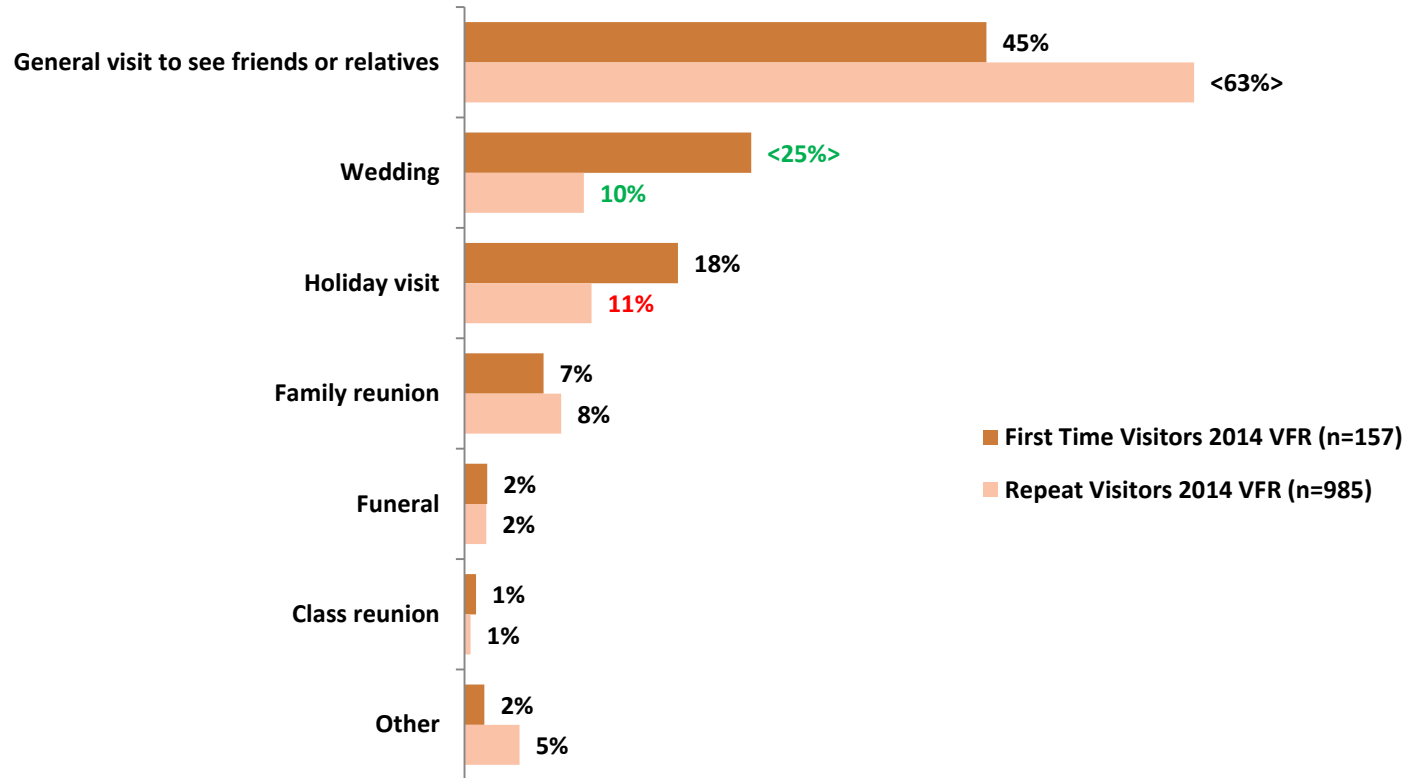


Q27. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following? .
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
 < > indicates a significant difference between subgroups at the 95% confidence level.

The most widely cited primary trip purpose for first-time VFR travelers was a *general visit to see friends or relatives*.

- First-time visitors are more likely than repeat visitors to be in Maine for a *wedding*, while repeat visitors are more likely to be in Maine for a *general visit to see friends/relatives*.

Primary Purpose of Overnight VFR Trips



Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

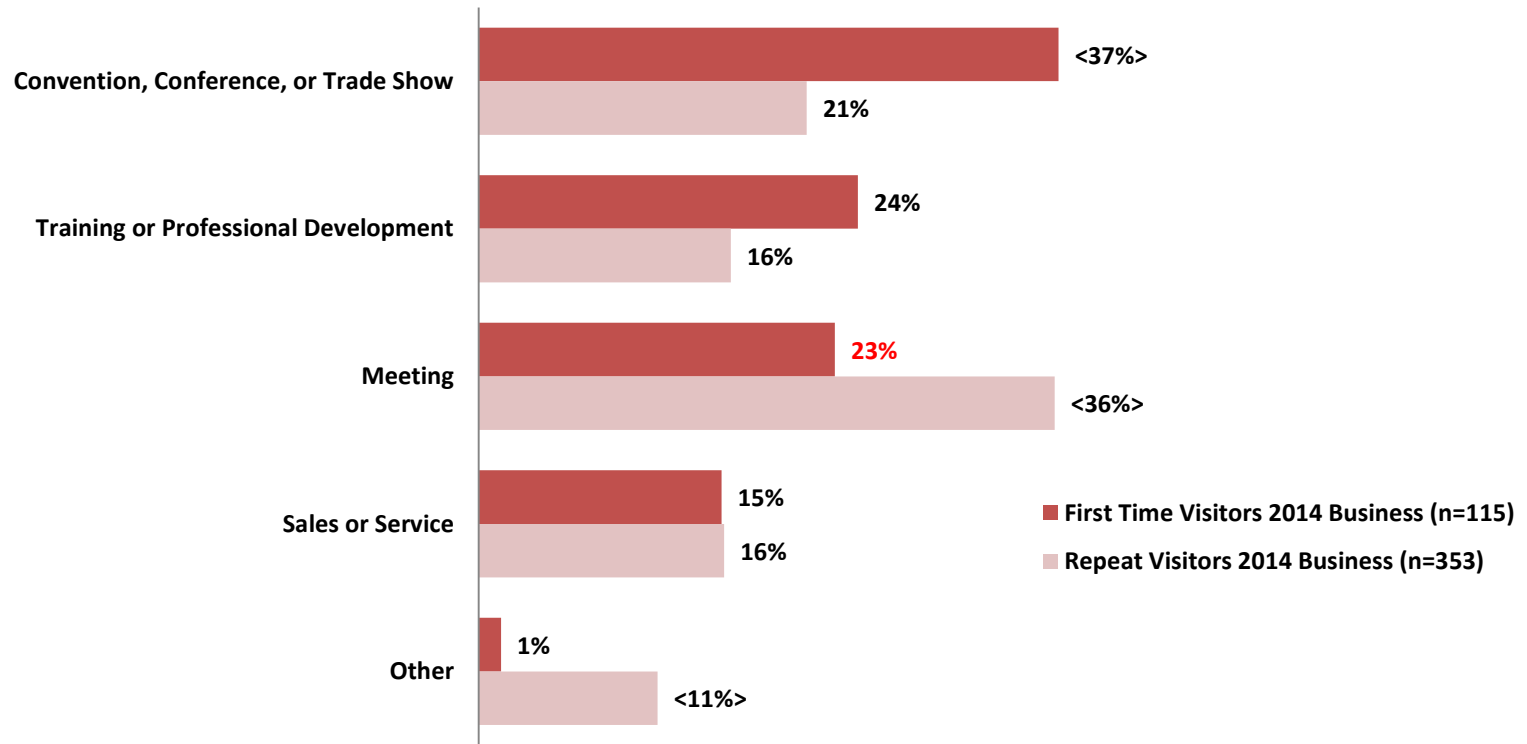
< > indicates a significant difference between subgroups at the 95% confidence level.

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

One-third of first-time visitors in Maine for business are traveling for a convention, conference, or trade show.

- Business travelers in Maine for the first time are more likely than repeat visitors to be here for a *convention/conference/trade show* (37% versus 21%), while repeat business visitors are more likely to be here for a general *meeting* (36% versus 23%).

Primary Purpose of Overnight Business Trips



Q8. What was the primary purpose of your most recent business trip in Maine?

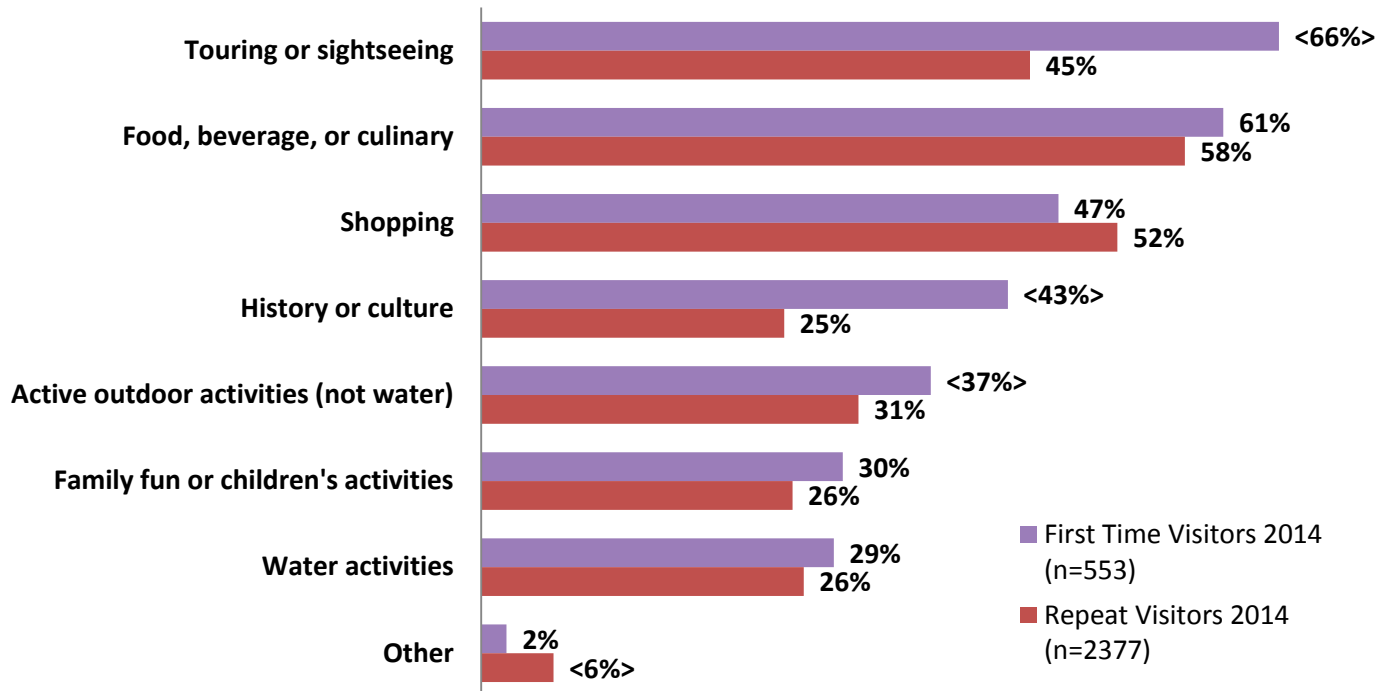
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Touring/sightseeing and food/beverage/culinary interests are the top interest areas among first-time overnight visitors to Maine.

- When compared with repeat visitors, first-time visitors are more likely to select the following interest areas as ones they wanted to pursue during their trip to Maine: *touring/sightseeing*, *history/culture*, and *active outdoor activities (non-water)*.

2014 Interest Areas*



Most Important Interest Areas	
First Time Visitors	Repeat Visitors
59% <>	50%
30%	35%
14%	23% <>
17%	23%
26%	37% <>
39%	51% <>
21%	37% <>
72%	94%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q30. 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. 18

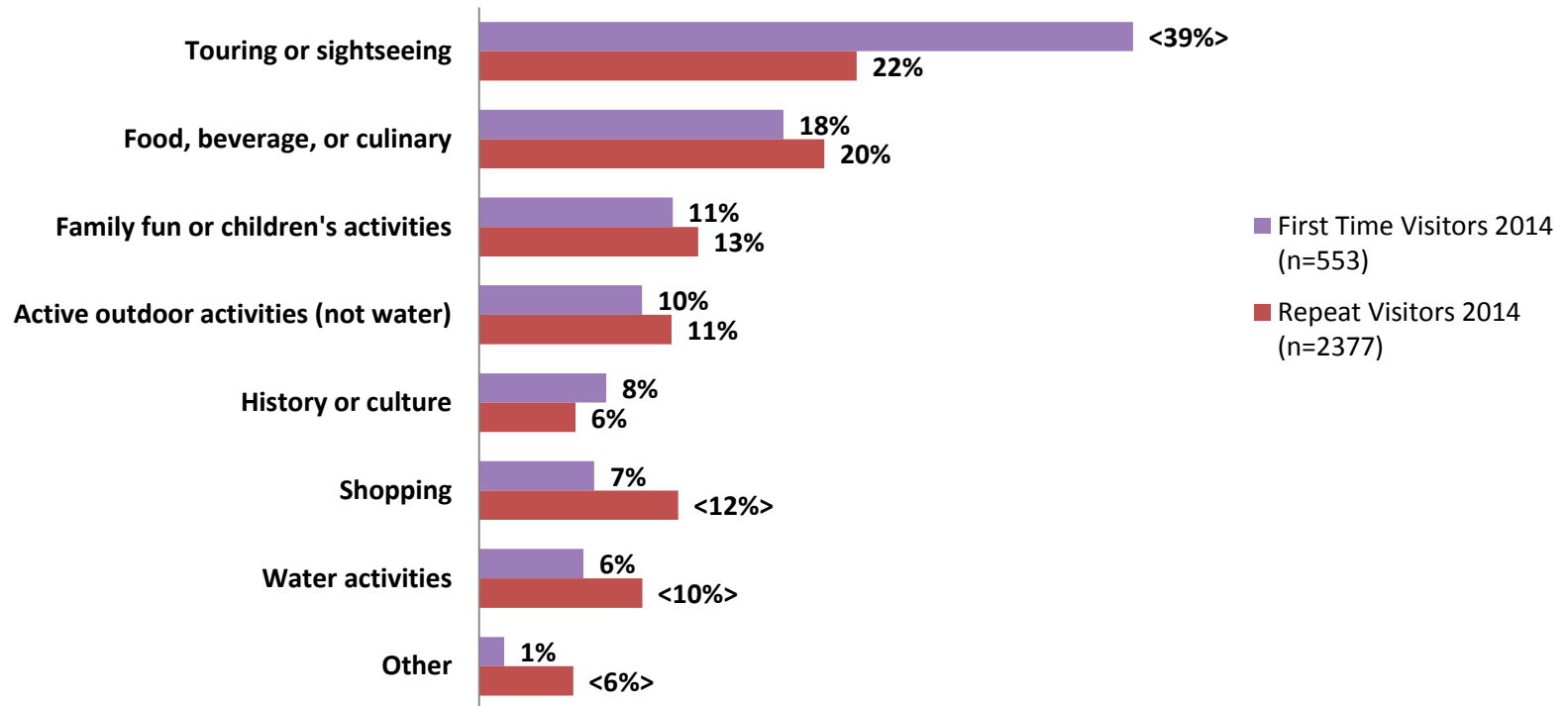
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

When analyzing both interest and importance, *touring/sightseeing* ranks highest among first-time visitors.

- First-time visitors are more likely than repeat visitors to rank *touring/sightseeing* higher when considering both interest and importance, while repeat visitors are more likely to rank *shopping* and *water activities* higher than first-time visitors.

2014 Interest Areas* Importance Index



Importance Index = percentage selecting category as interest area X percentage listing same interest area as most important

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

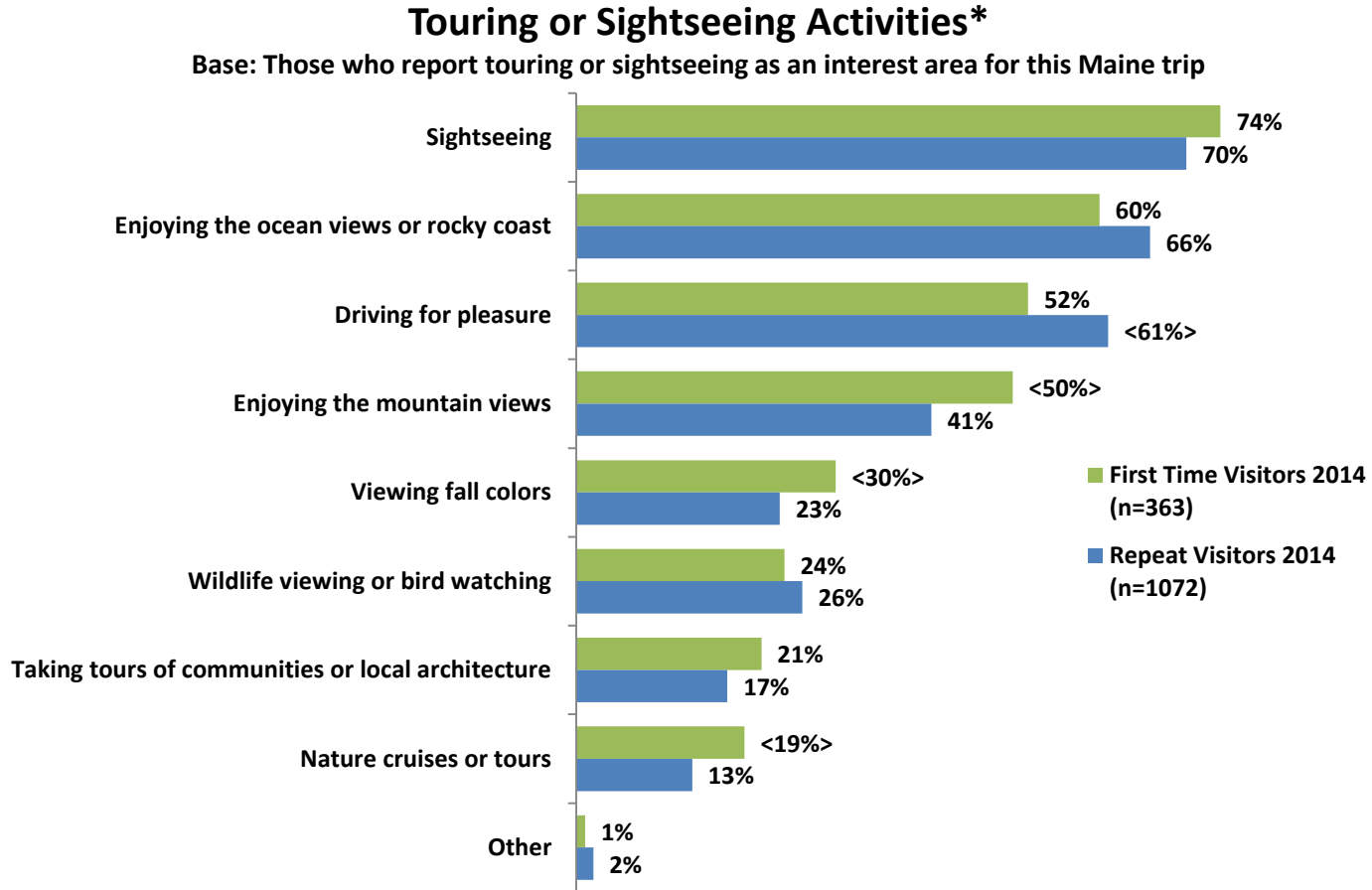
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 19

< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

General *sightseeing* is the most frequently enjoyed touring/sightseeing activity among first-time visitors.

- First-time visitors interested in touring/sightseeing activities are more likely than repeat visitors to *enjoy the mountain views, view fall colors, or take nature cruises or tours*, while repeat visitors are more likely to *drive for pleasure*.



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

< > indicates a significant difference between subgroups at the 95% confidence level.

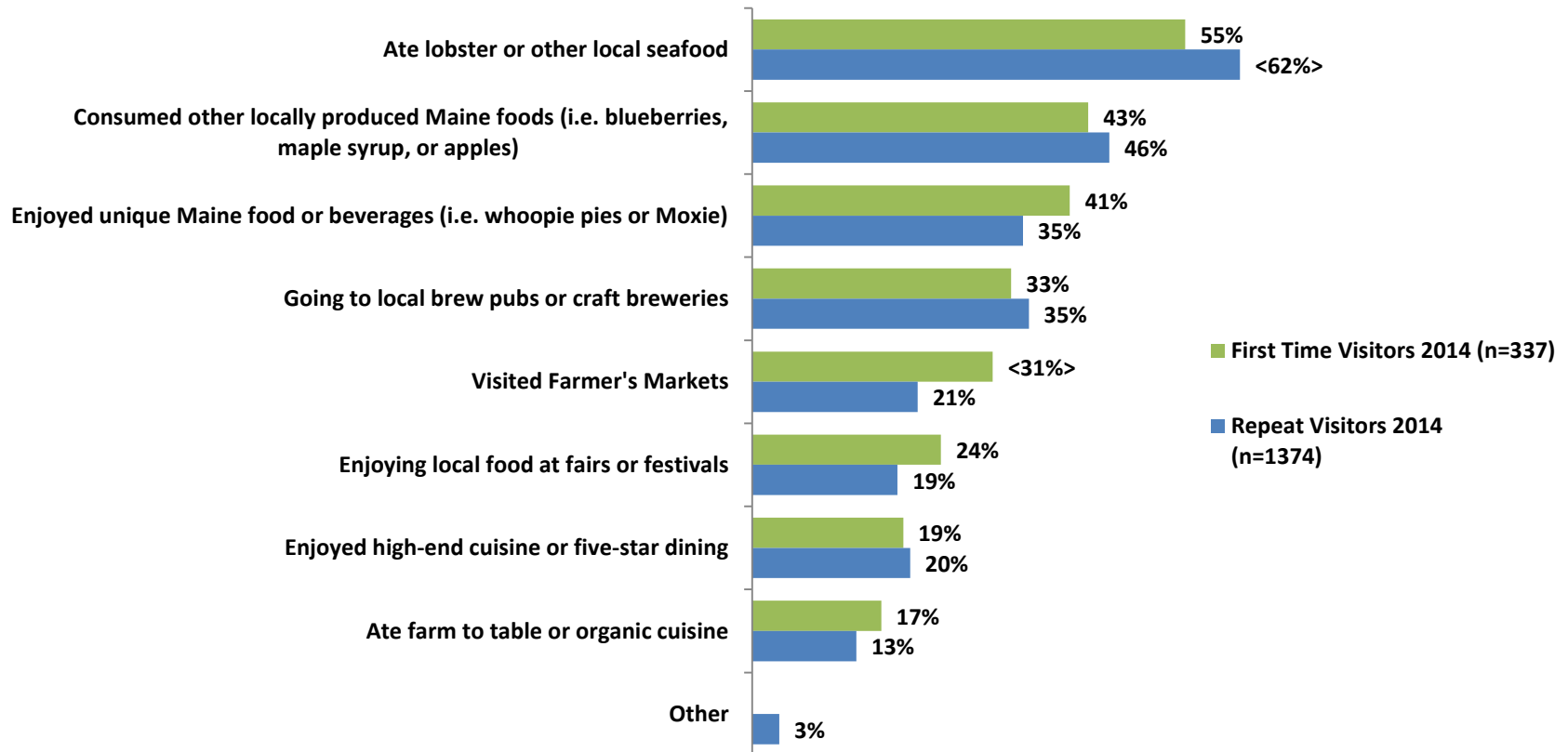
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

The most common food/beverage/culinary activity pursued by first-time visitors is *eating lobster or other local seafood*.

- Repeat visitors interested in food/beverage/culinary activities are even more likely than first-time visitors to report that they *ate lobster or other local seafood* while visiting Maine.

Food, Beverage, or Culinary Activities*

Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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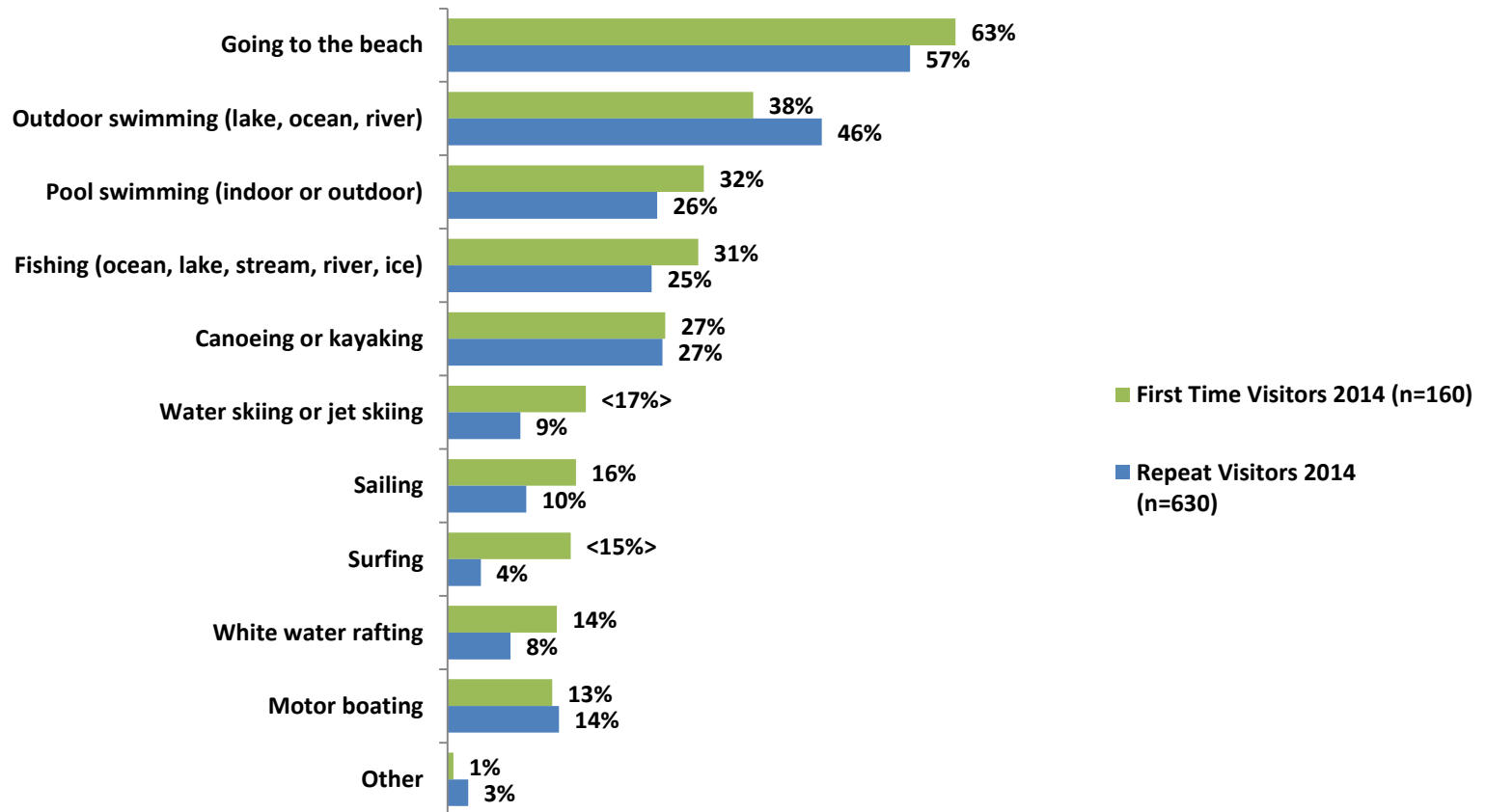
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Going to the beach is the top activity among first-time visitors interested in water activities.

- First-time visitors interested in water activities are more likely than repeat visitors to have done some *water skiing/jet skiing* or *surfing* while visiting Maine.

Water Activities*

Base: Those who report water activities as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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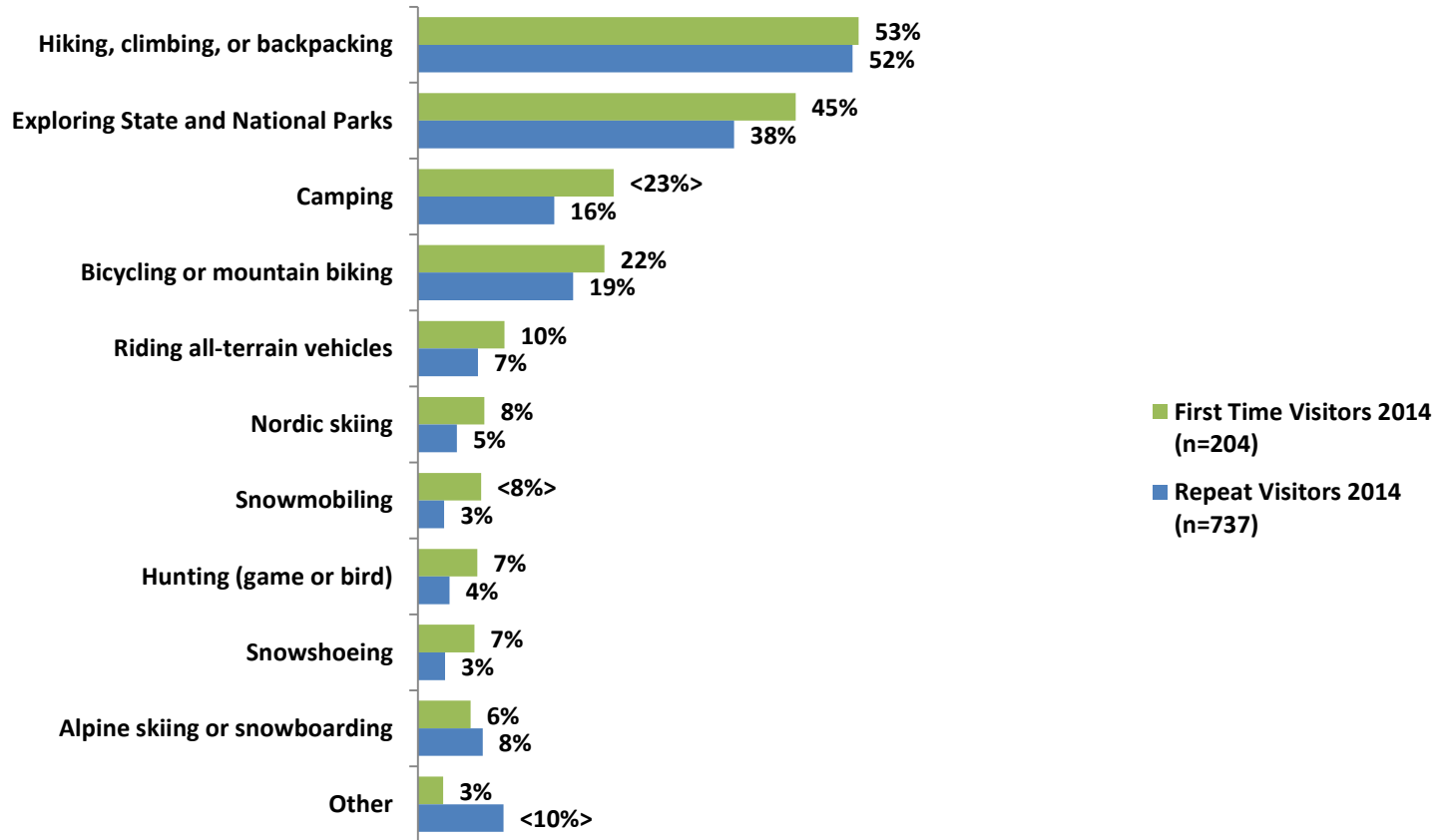
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Hiking/climbing/backpacking is the most prevalent active outdoor interest participated in by first-time and repeat visitors alike.

- Camping and snowmobiling were more popular among first-time visitors as compared to repeat visitors.

Active Outdoor Activities – Non-Water*

Base: Those who report outdoor activities as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

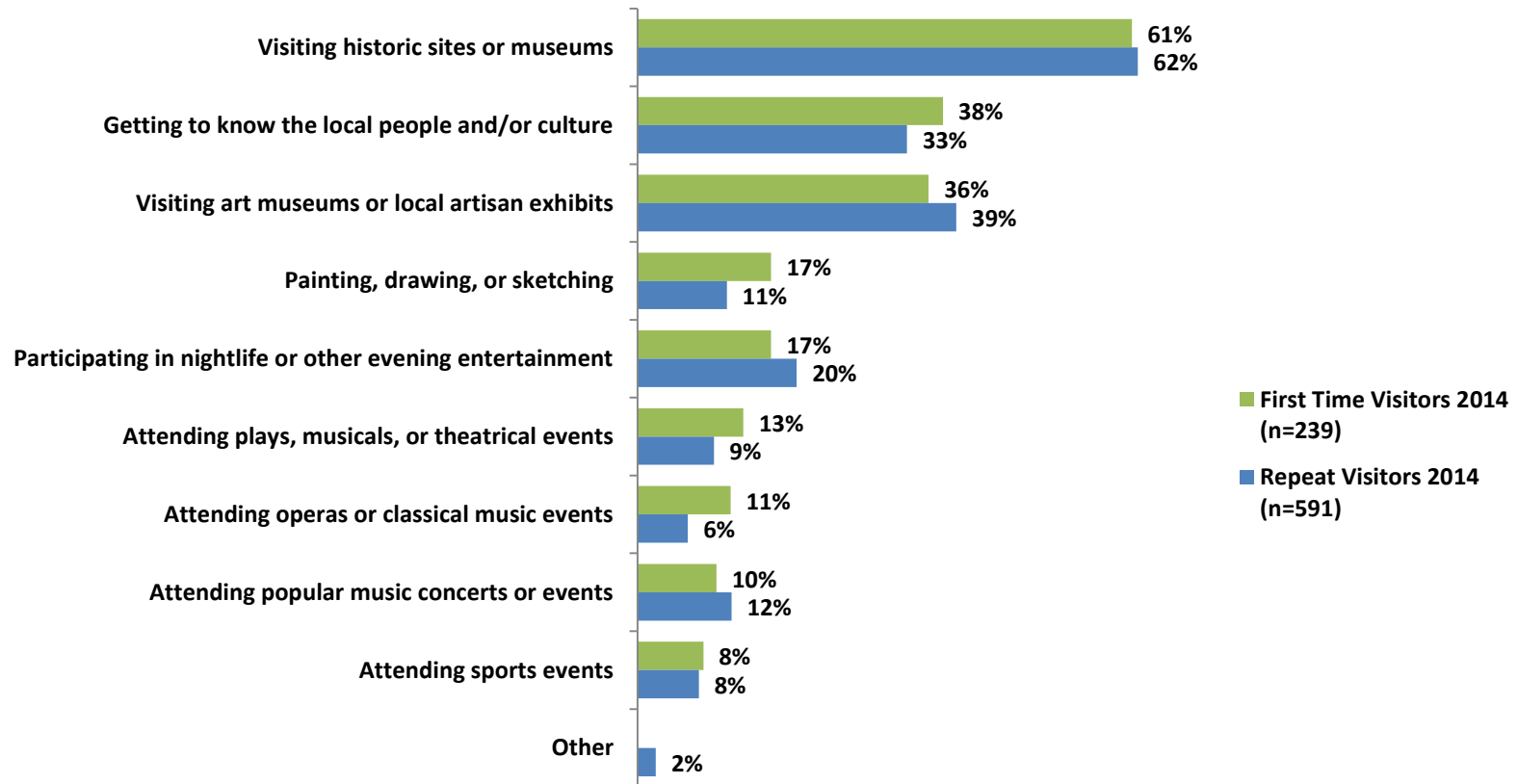
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Nearly two-thirds of first-time visitors interested in history or culture spent time *visiting historic sites/museums* while in Maine.

History or Culture Activities*

Base: Those who report history or culture as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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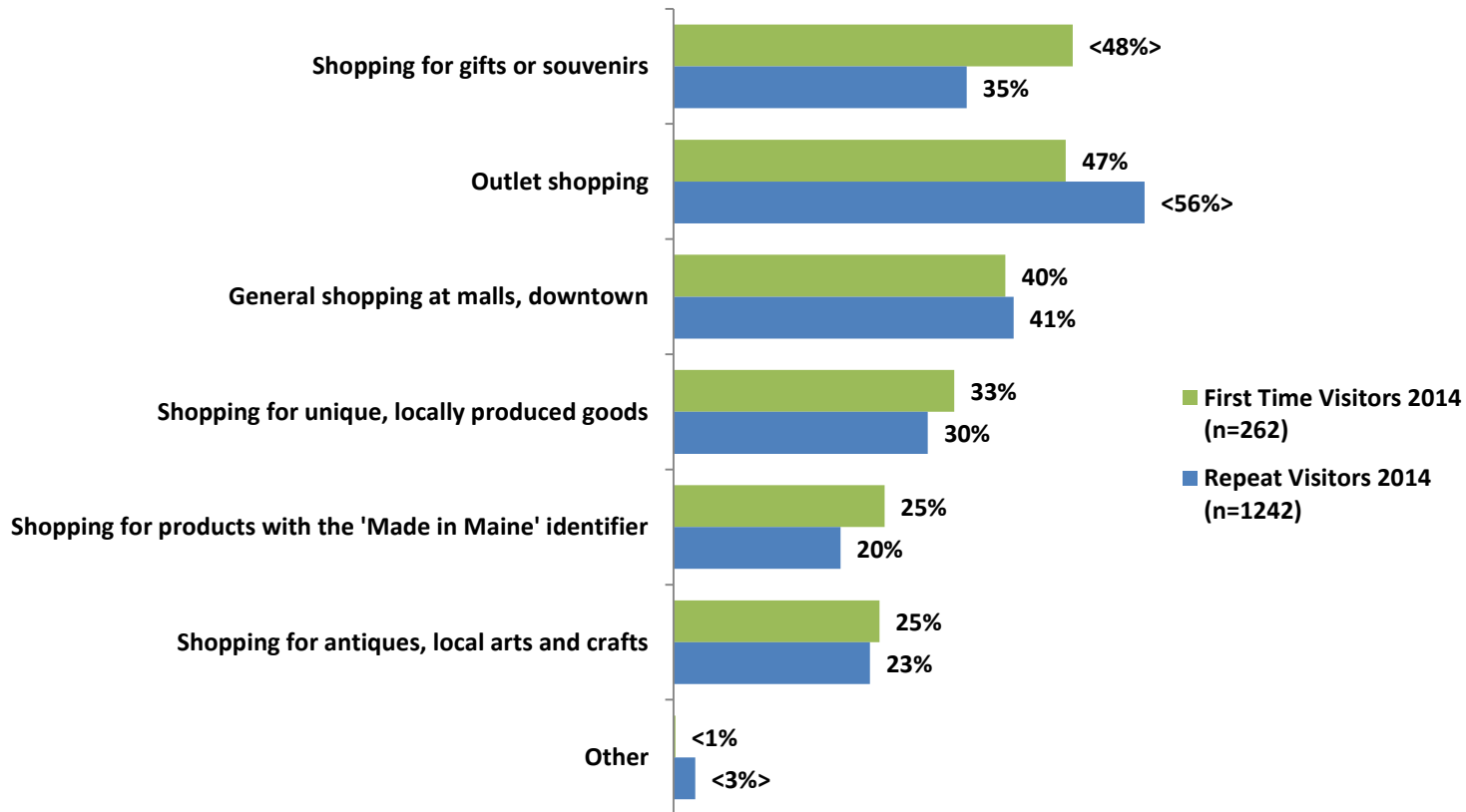
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Shopping for gifts/souvenirs and outlet shopping are the most popular shopping activities among first-time visitors.

- While repeat visitors are more likely than first-time visitors to do some *outlet shopping*, first-time visitors are more likely to be *shopping for gifts or souvenirs*.

Shopping Activities*

Base: Those who report shopping as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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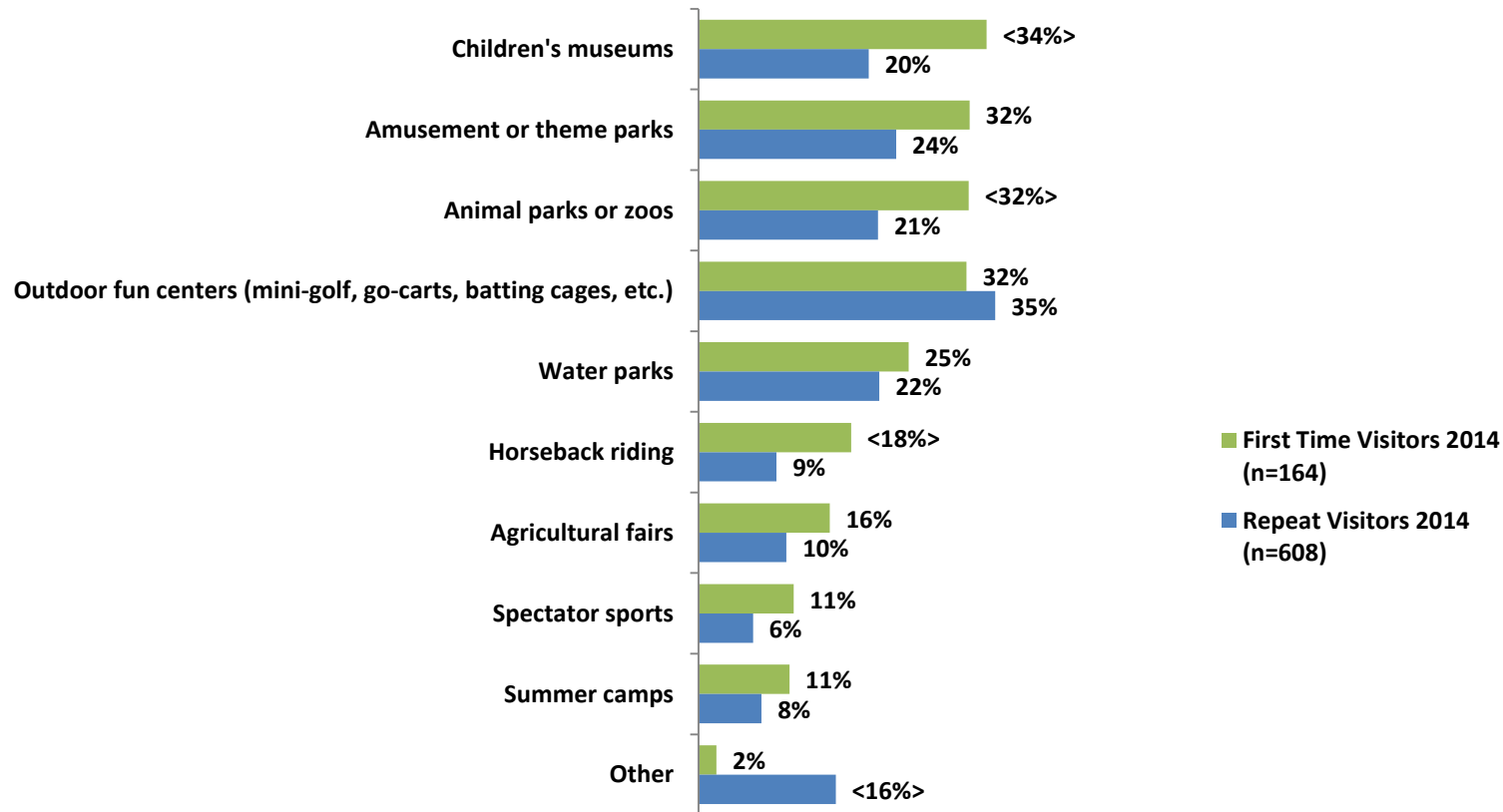
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

First-time visitors interested in family fun/children’s activities participated in a wide variety of these activities while in Maine.

- Children’s museums, animal parks/zoos, and horseback riding are all more popular family fun/children’s activities among first-time visitors, as compared to repeat visitors.

Family Fun/Children’s Activities*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

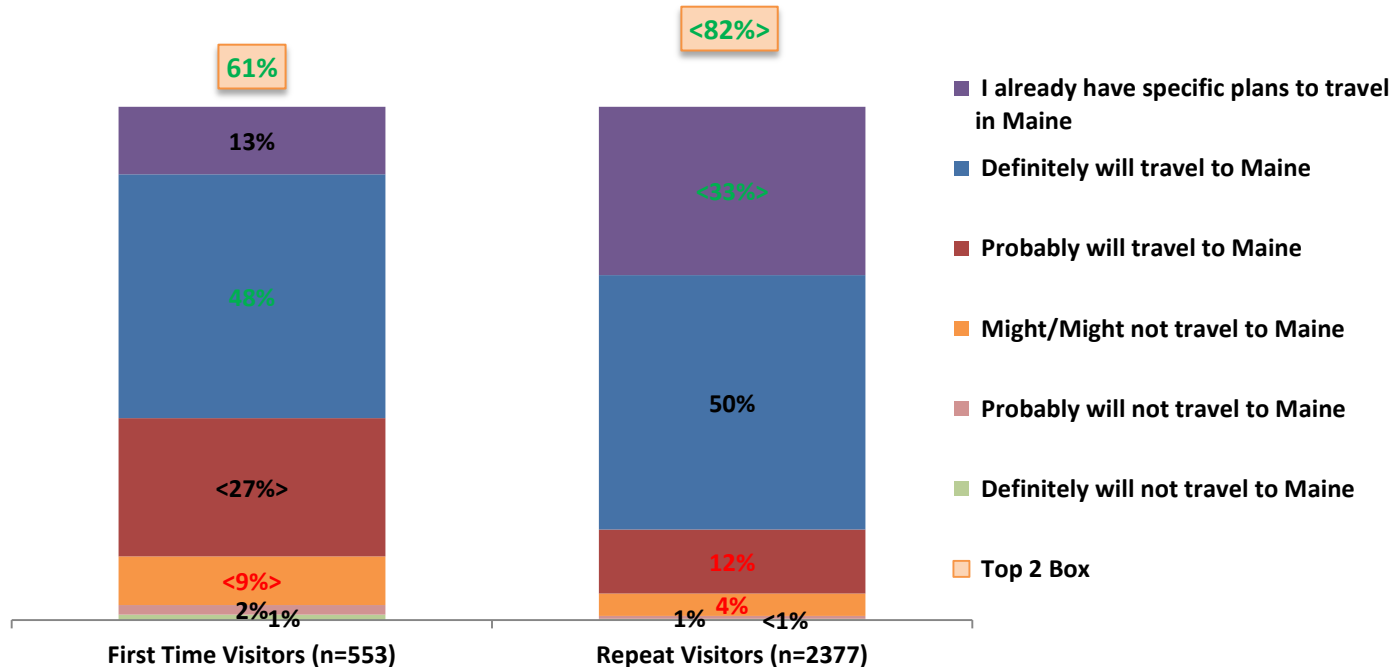
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Nearly two-thirds of Maine's first-time visitors intend to visit Maine again in the next two years.

- Repeat visitors are more likely than first-time visitors to indicate that they *already have specific plans to travel in Maine*. First-time visitors are less committal, being more likely to state that they *probably will travel to Maine* or that they *might or might not travel to Maine*.

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the future/take a day trip in Maine in the next 2 years?

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

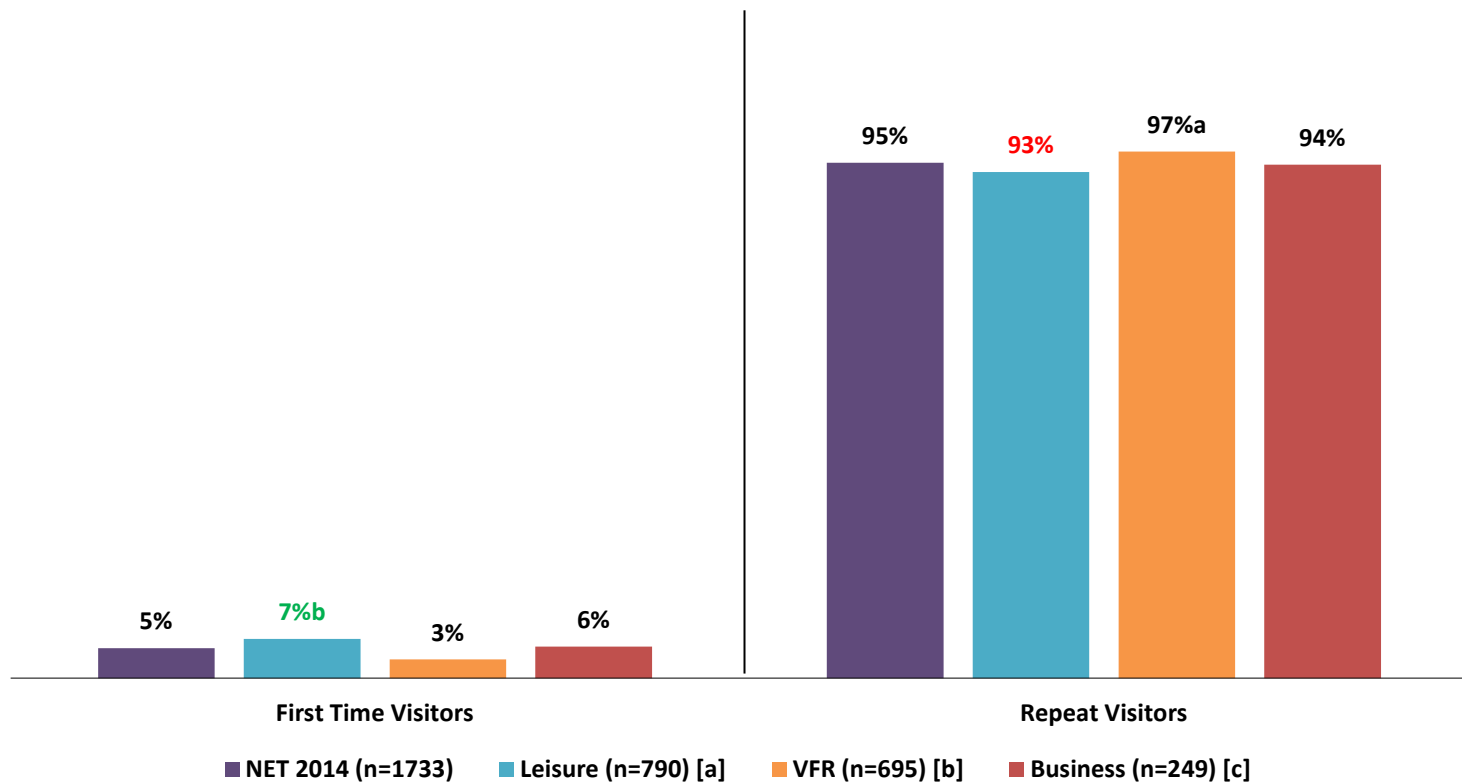
<> indicates a significant difference between subgroups at the 95% confidence level.

First-Time Day Visitors: *Traveler Description*



In 2014, only five percent of Maine's day visitors were visiting Maine for the first time.

- Day visitors are much more likely than overnight visitors to be repeat visitors to Maine, with nearly all day visitors indicating that they have previously been to Maine.

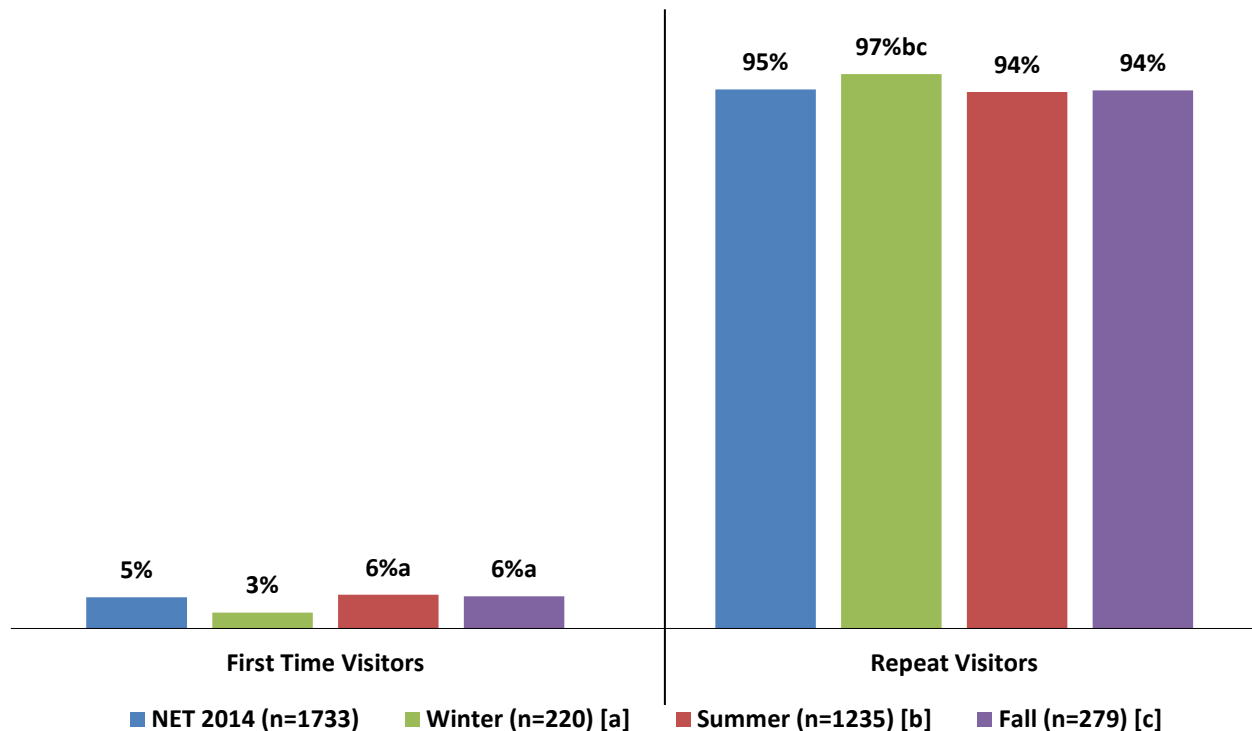


Q10. Was this your first trip to Maine?

a, b, c indicates significant difference 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.

The proportion of first-time day visitors to Maine is higher in the summer and fall than in winter, as it is for first-time overnight visitors.



Q10. Was this your first trip to Maine?

a, b, c indicates significant difference 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 Visitor Demographics

- Similar to overnight visitors, first-time day visitors trend younger than repeat visitors. First-time day visitors also have lower average household incomes than repeat day visitors.

2014 Day Visitors	First Time Visitors (n=95*)	Repeat Visitors (n=1638)
Age:		
< 35	<50%>	23%
35 - 44	20%	16%
45 - 54	21%	22%
55 +	9%	<39%>
Mean Age (Years)	38.2	<48.5>
Income:		
< \$50,000	27%	21%
\$50,000 - \$99,000	45%	43%
\$100,000 +	27%	36%
Mean Income (Thousands)	\$75,200	<\$94,700>
Female	53%	56%
College Degree or Higher	65%	69%
Married	56%	65%
Employed Full Time	59%	53%

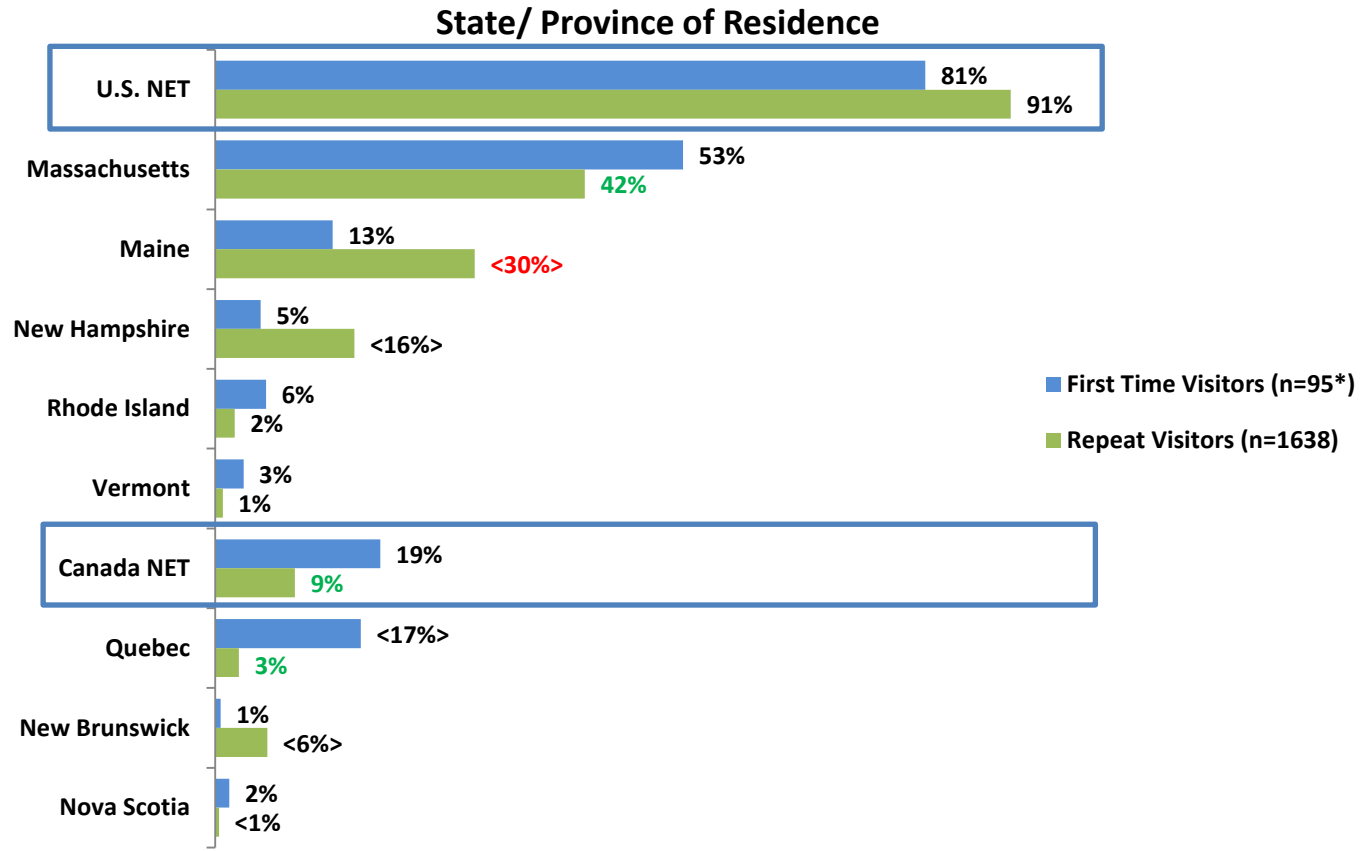
<> indicates a significant difference between subgroups at the 95% confidence level.

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

**Please note small sample size.*

Four in five first-time day visitors are US residents, with the majority arriving from Massachusetts.

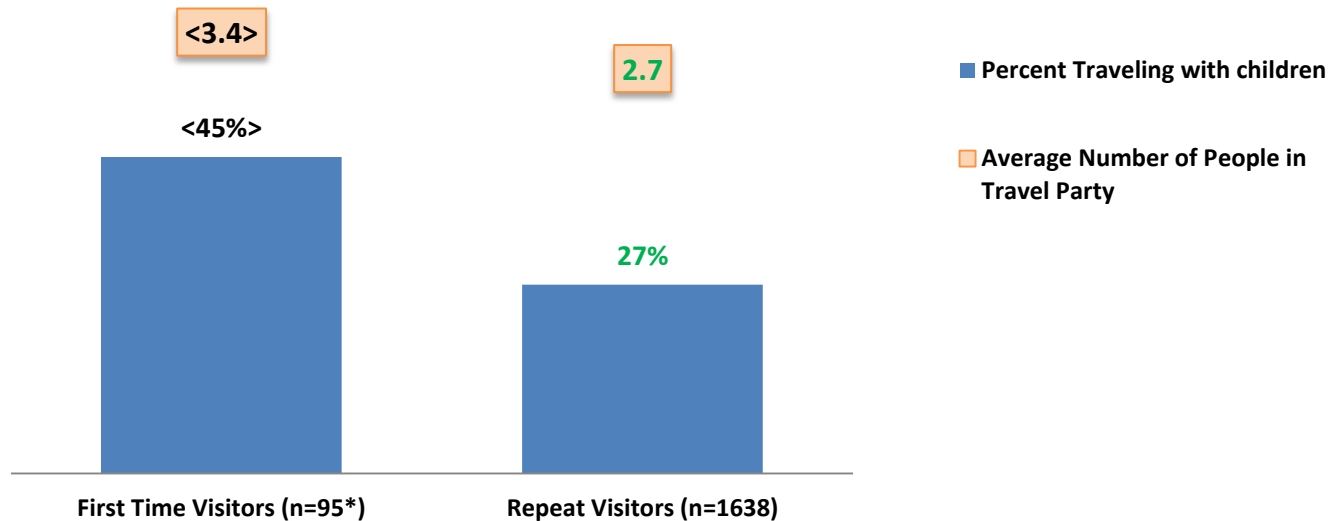
- Day visitors arriving from Quebec are more likely to be visiting Maine for the first time, while those traveling from Maine or New Hampshire are more likely to be repeat visitors.



Nearly half of first-time day visitors are traveling with children when visiting Maine.

- First-time day visitors to Maine are significantly more likely than repeat day visitors to be traveling with children. Following on this higher proportion bringing children, average party size is also higher among first-time visitors than it is for repeat visitors.

Travel Party Composition



Q14. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q15. How many of these people were: Children

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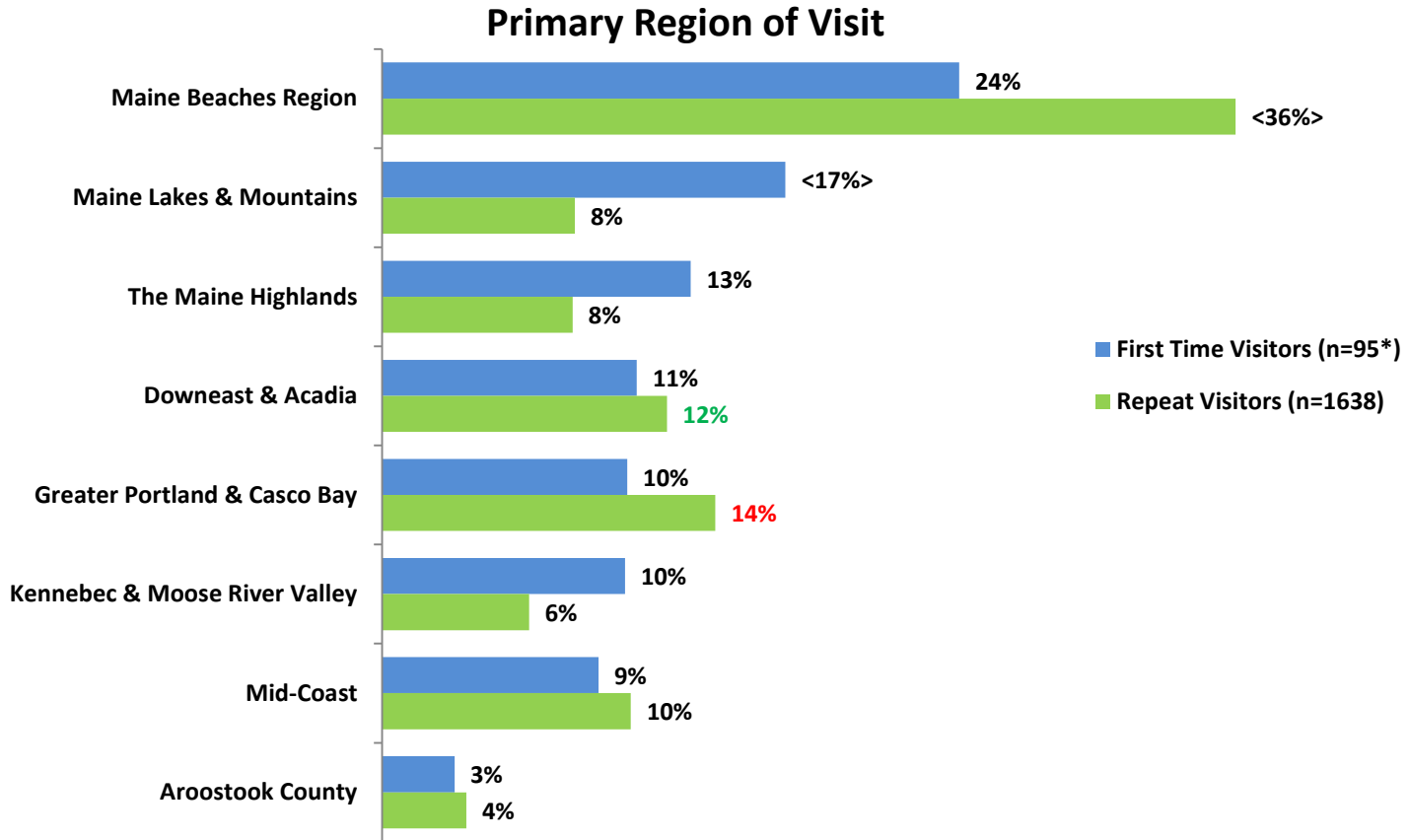
**Please note small sample size.*

First-Time Day Visitors: *Trip Experience*



The Maine Beaches region is the primary destination for both first-time and repeat day visitors.

- First-time day visitors are more apt to be drawn to the Maine Lakes & Mountains region than repeat day visitors, while the Maine Beaches region is more popular among repeat visitors.



Regional Q20. What region in Maine was your primary destination on your most recent trip?

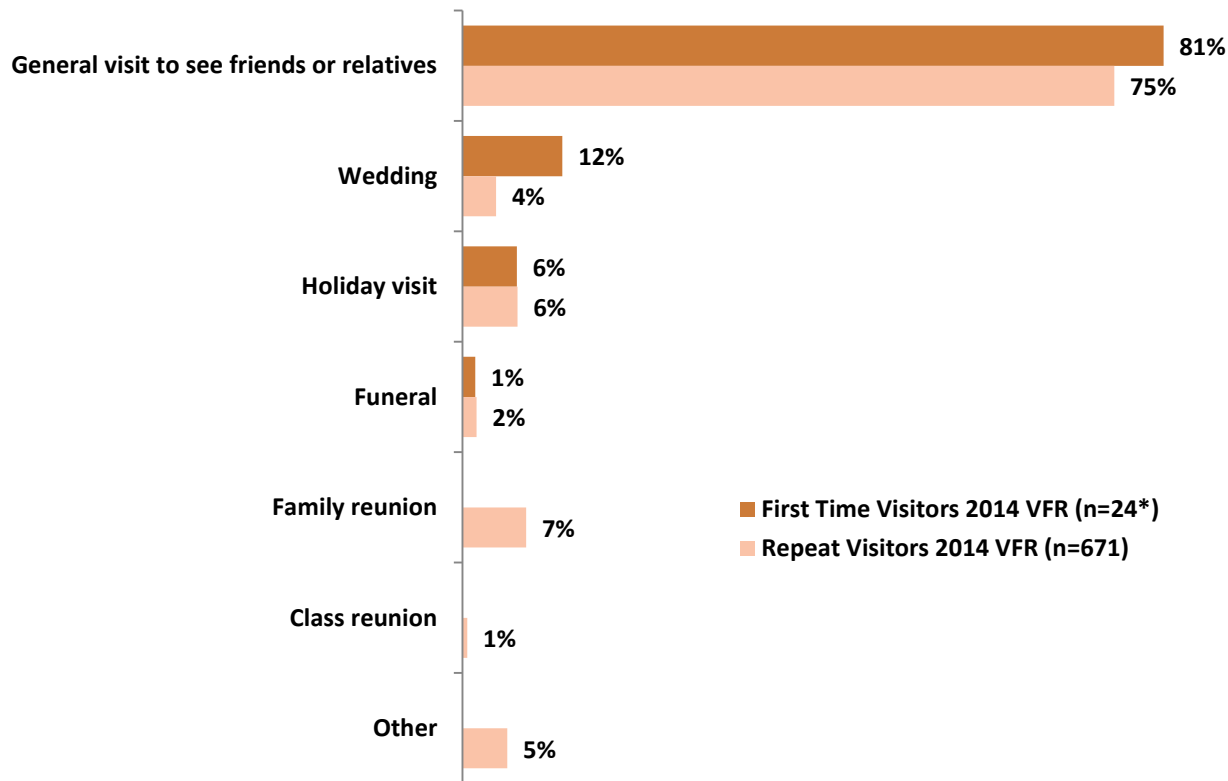
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

**Please note small sample size.*

<> indicates a significant difference between subgroups at the 95% confidence level.

The vast majority of first-time day visitors on a VFR trip are on a general visit to see friends or relatives.

Primary Purpose of Day VFR Trips



Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

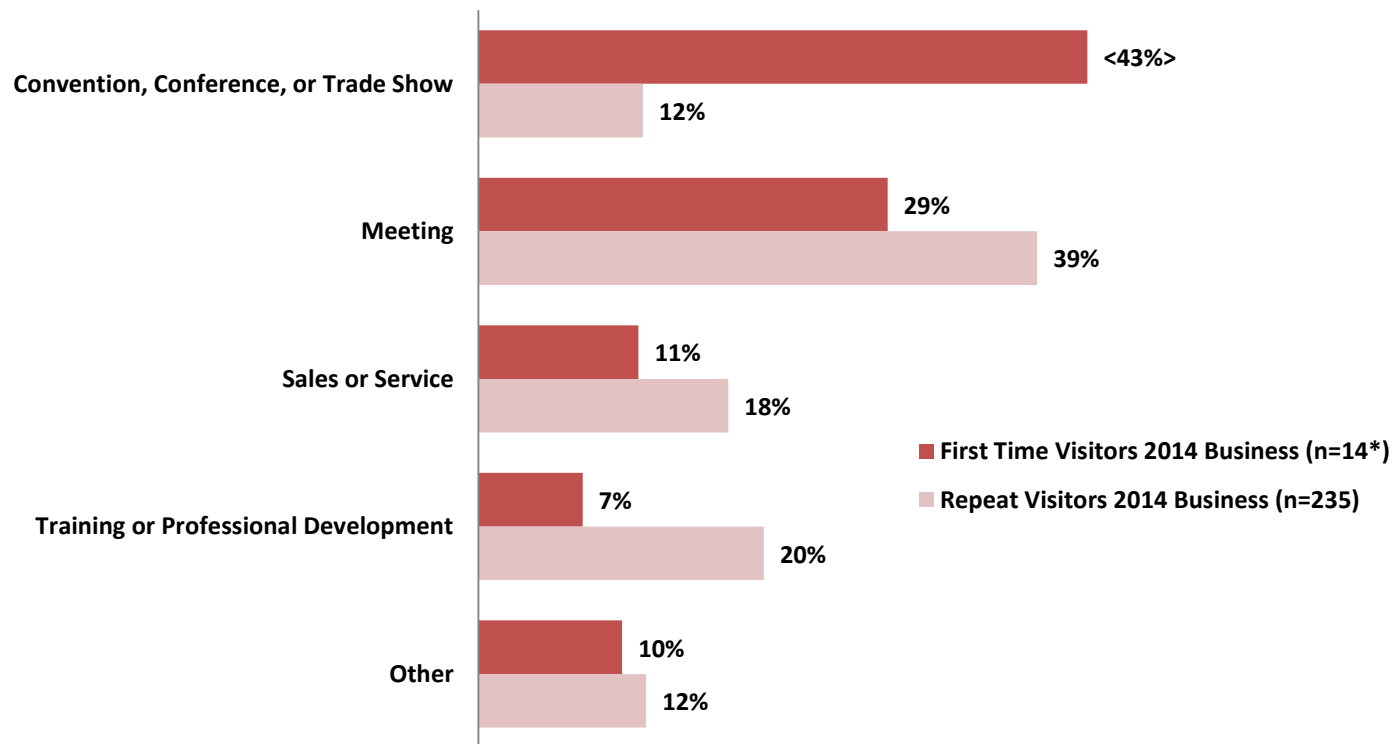
< > indicates a significant difference between subgroups at the 95% confidence level.

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

* Please note extremely small sample size.

Business day trips for first-time visitors are mostly to attend a convention, conference, or trade show.

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 subgroups at the 95% confidence level.

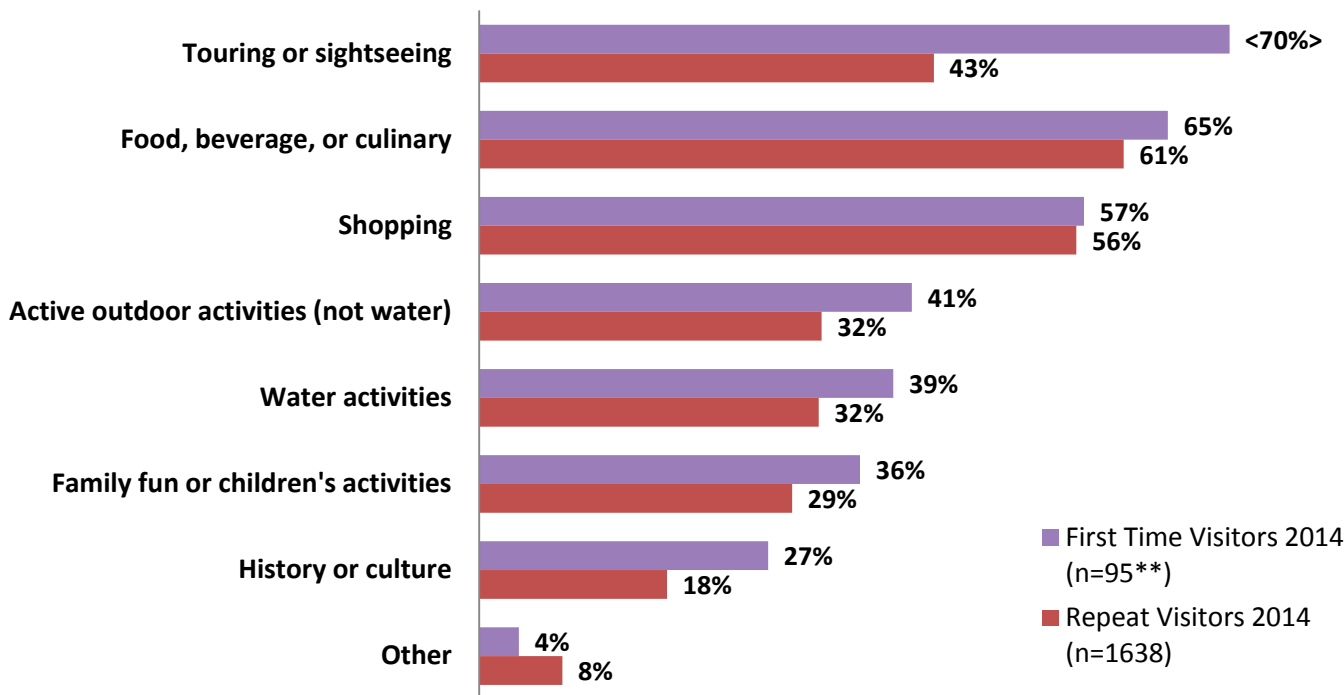
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

**Please note extremely small sample size.*

Touring/sightseeing and food/beverage/culinary interests are the top interest areas among first-time day visitors to Maine.

- Touring/sightseeing is by far more popular as an interest area among first-time visitors than among repeat visitors (70% versus 43%).

2014 Interest Areas*



Most Important Interest Areas	
First Time Visitors	Repeat Visitors
51%	43%
17%	25%
12%	<29>
24%	39%
43%	37%
33%	<57>
17%	18%
<100>	77%

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. 38

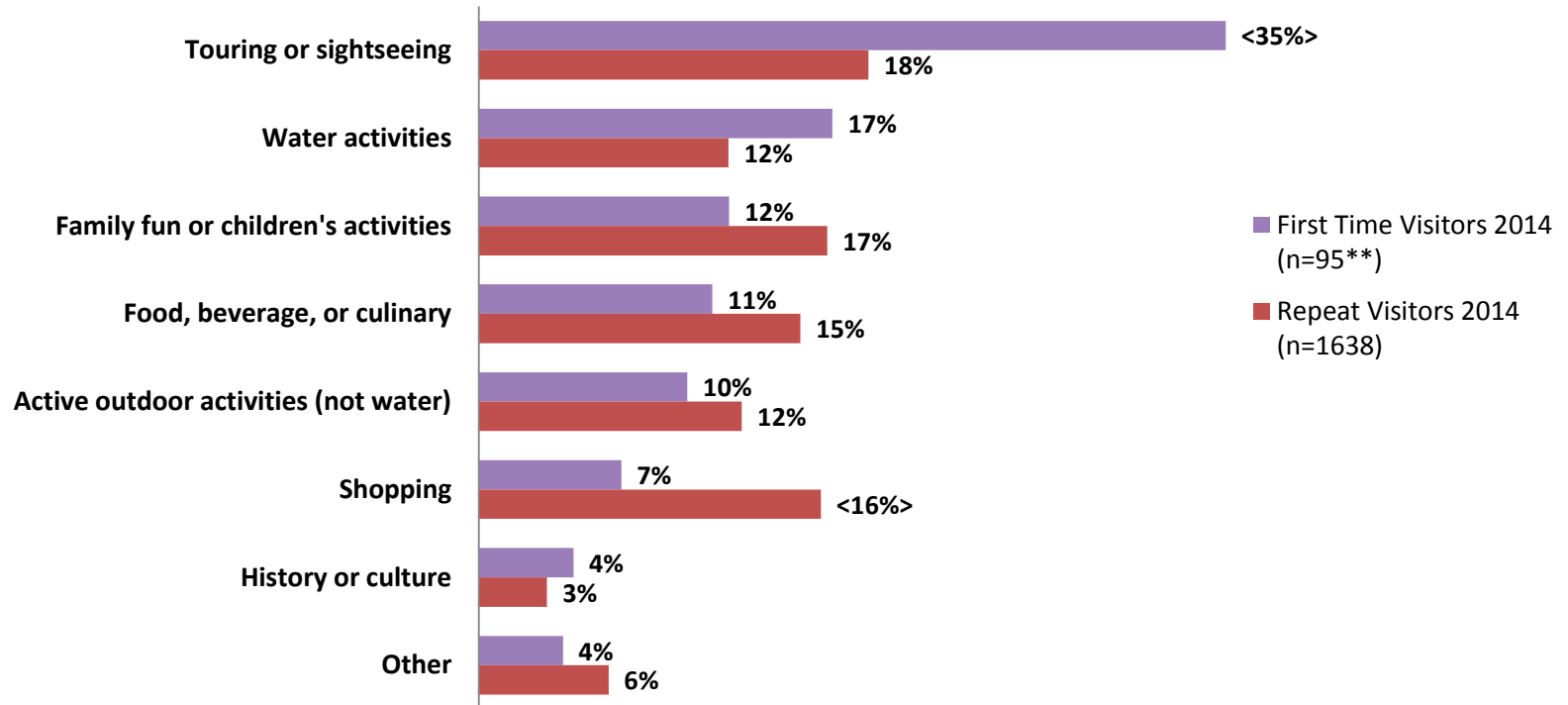
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

When analyzing both interest and importance, *touring/sightseeing* ranks highest among first-time visitors.

- First-time visitors are more likely than repeat visitors to rank *touring/sightseeing* higher when considering both interest and importance, while repeat visitors are more likely to rank *shopping* higher.

2014 Interest Areas* Importance Index



Importance Index = percentage selecting category as interest area X percentage listing same interest area as most important

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. 39

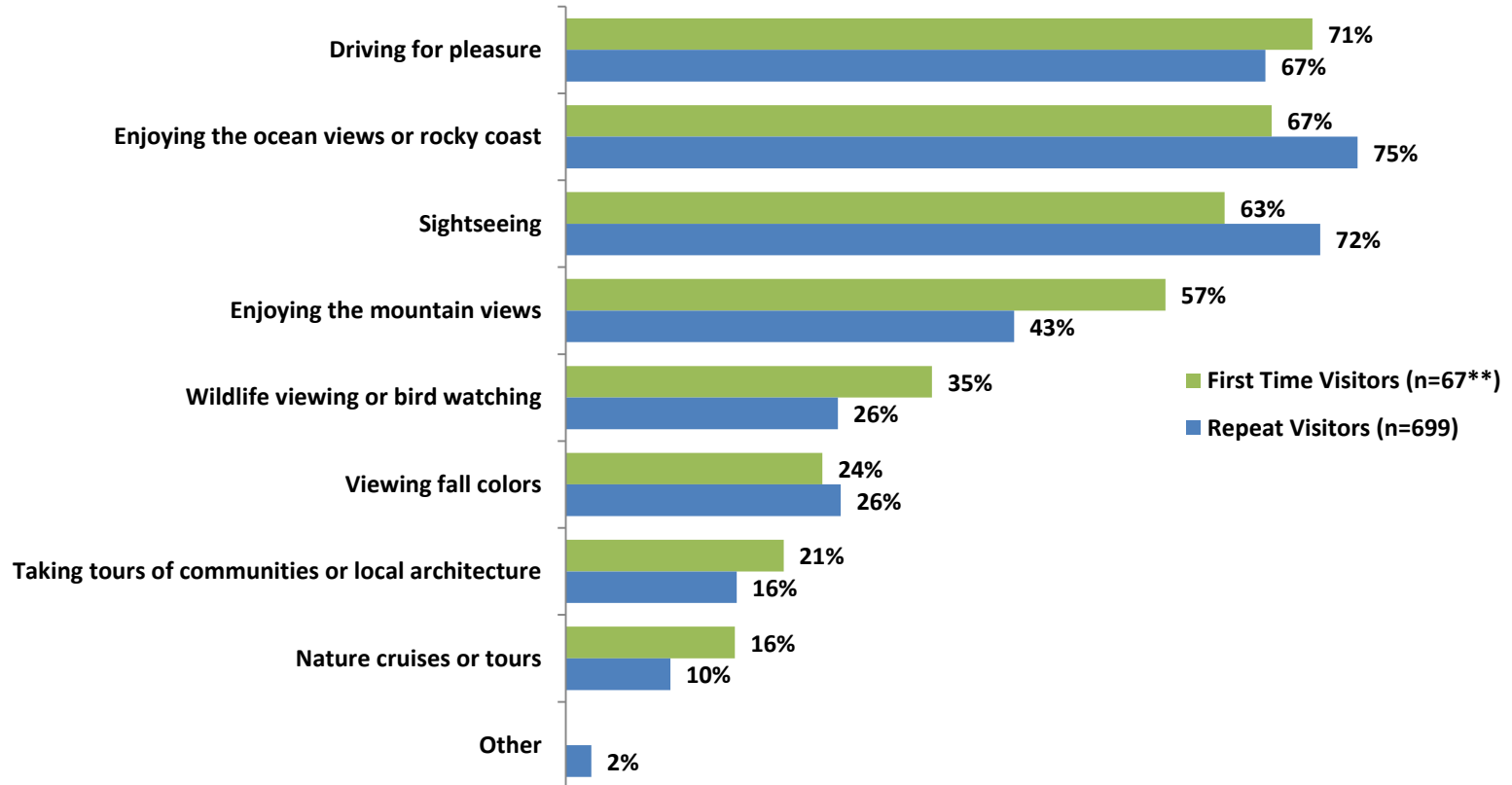
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Driving for pleasure and enjoying the ocean views or rocky coast are the most common touring/sightseeing activities among first-time day visitors.

Touring or Sightseeing Activities*

Base: Those who report touring or sightseeing as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

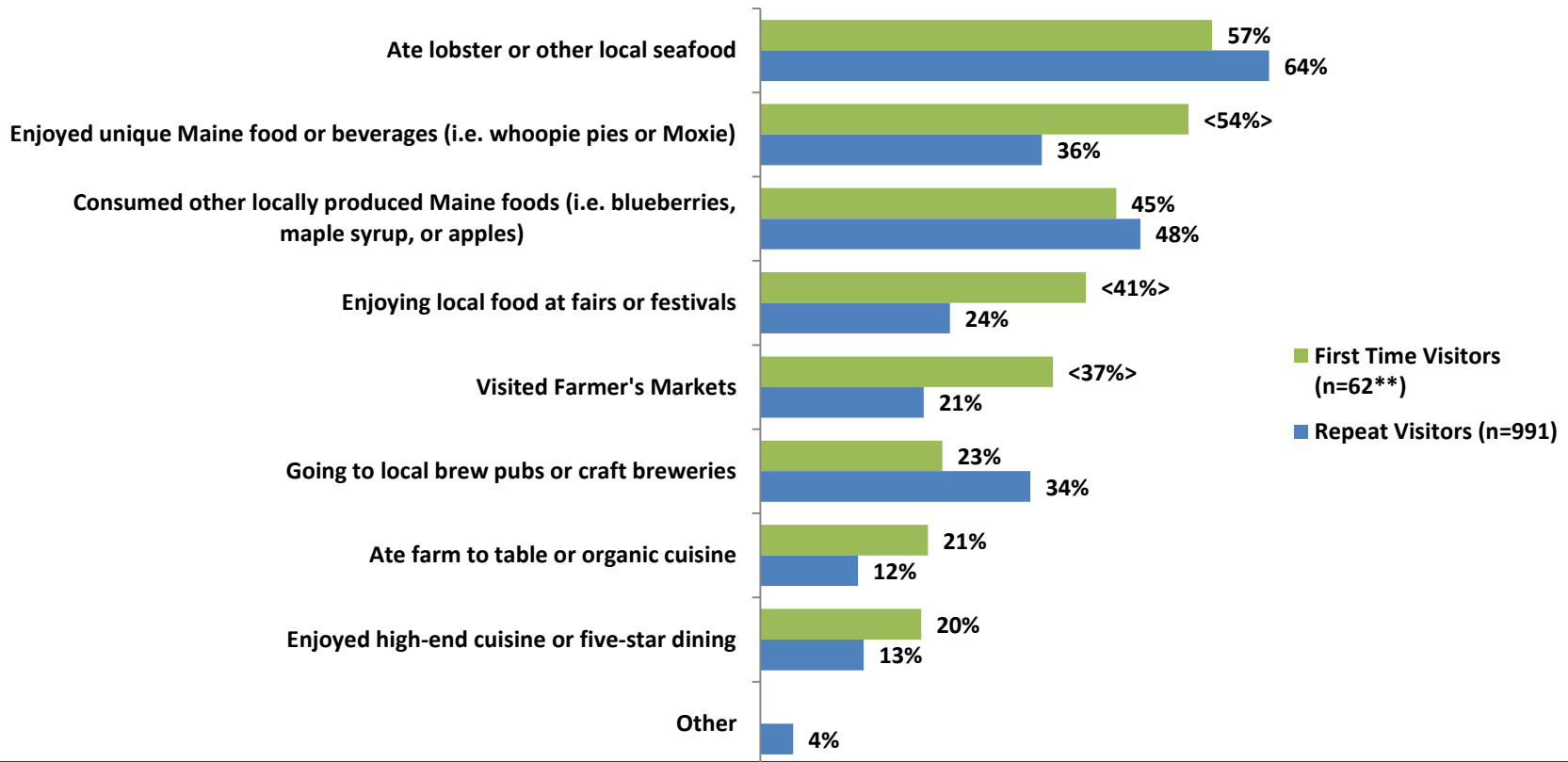
**Please note small sample size.

Eating lobster or other local seafood and enjoying unique Maine food or beverages are the top food/beverage/culinary activities among first-time day visitors to Maine.

- First-time day visitors interested in food/beverage/culinary activities are more likely than repeat visitors to have done the following while in Maine: *enjoyed unique Maine food or beverages, enjoyed local food at fairs or festivals, and visited Farmer’s Markets.*

Food, Beverage, or Culinary Activities*

Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

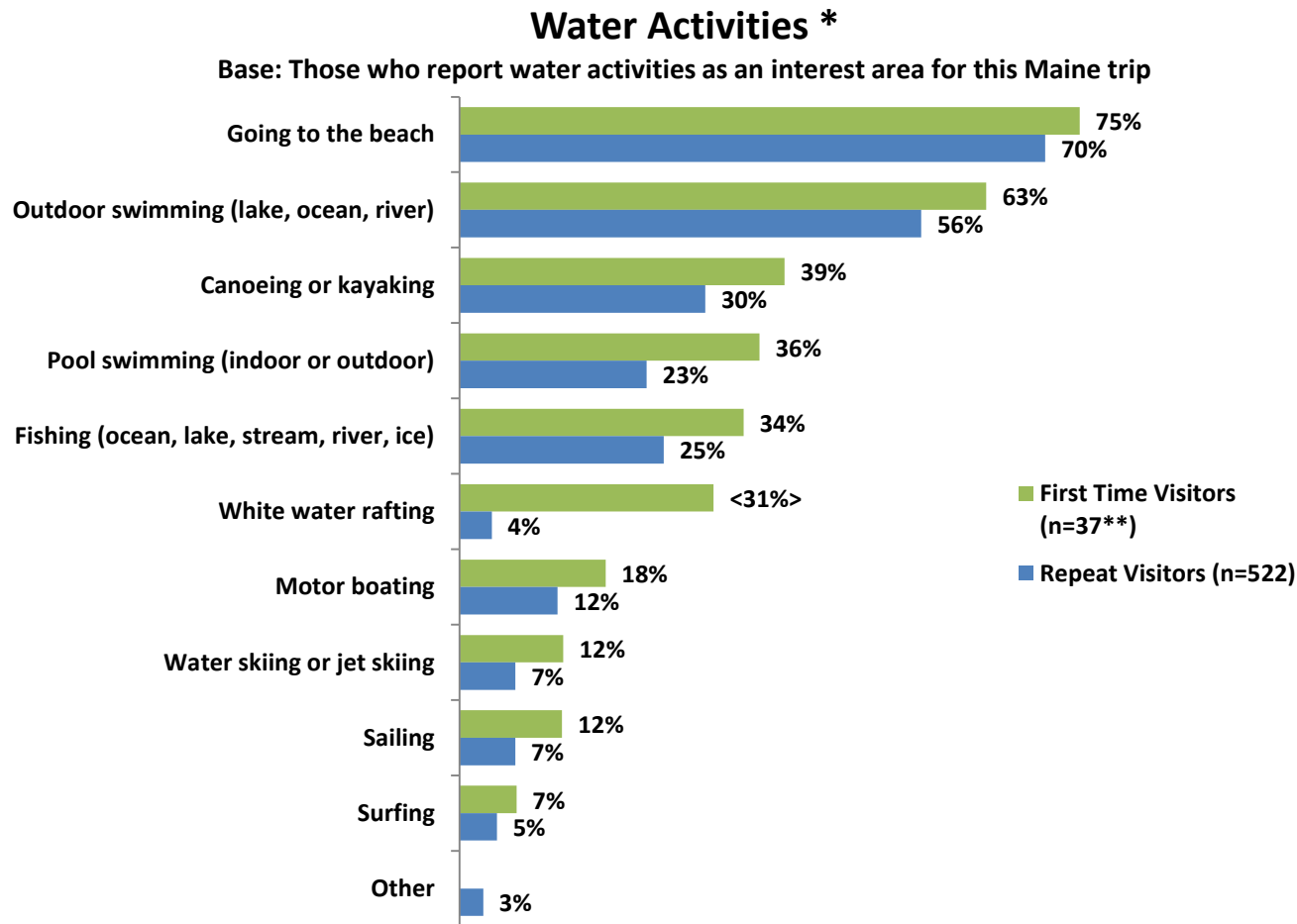
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Three-fourths of first-time day visitors interested in water activities spent time at the *beach* while visiting Maine.

- *Outdoor swimming* was also a popular activity among first-time day visitors interested in water activities.
- *White water rafting* is significantly more popular among first-time visitors interested in water activities than it is among repeaters.



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

< > indicates a significant difference between subgroups at the 95% confidence level.

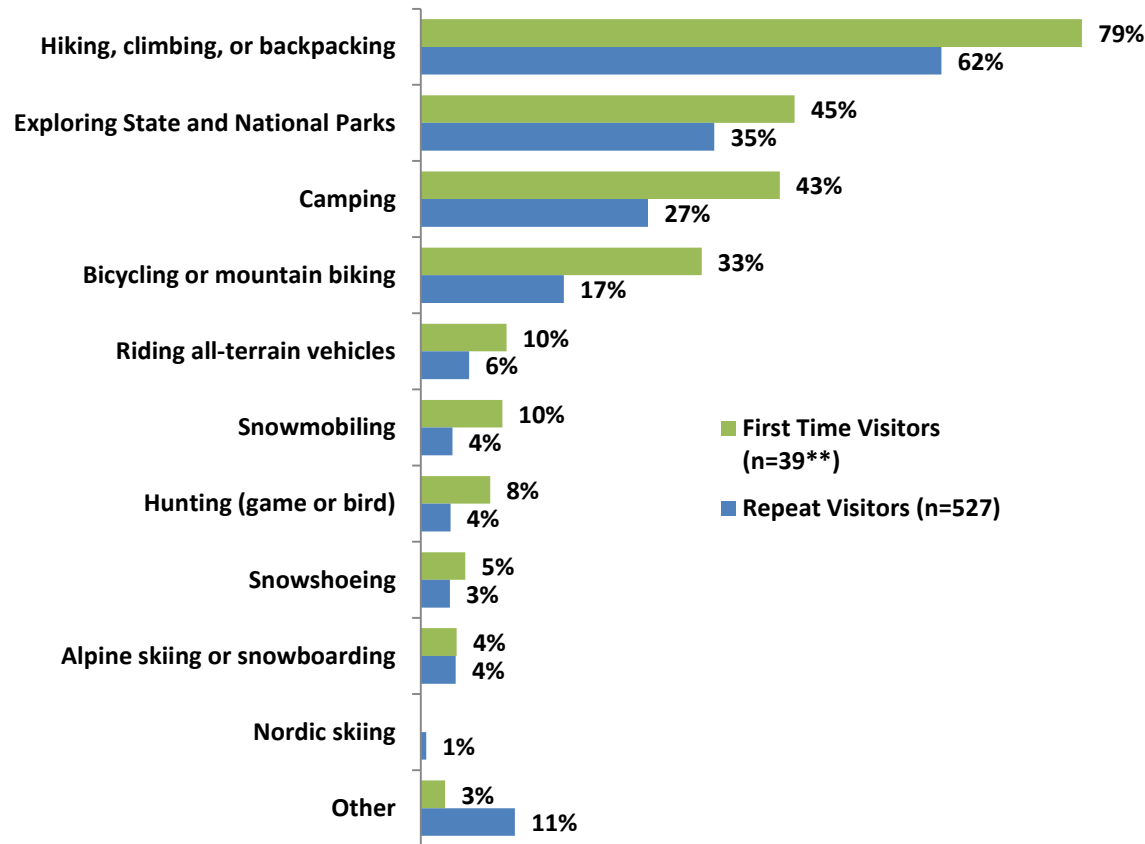
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Four in five first-time day visitors interested in active outdoor activities did some *hiking/climbing/backpacking* while in Maine.

Active Outdoor Activities – Non-Water*

Base: Those who report outdoor activities as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

< > indicates a significant difference between subgroups at the 95% confidence level.

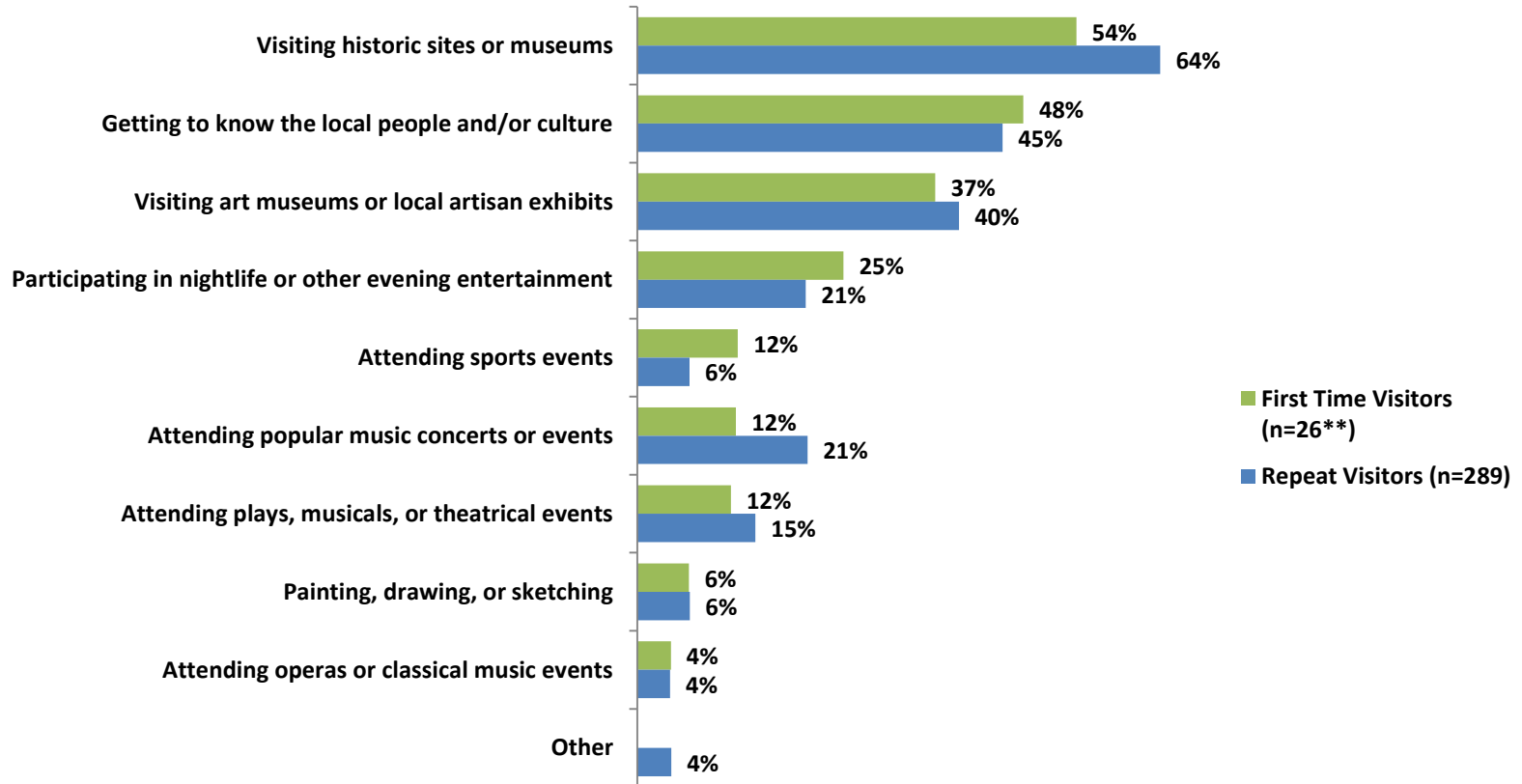
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Visiting historic sites/museums and getting to know the local people are the most popular history/culture activities among first-time day visitors.

History or Culture Activities*

Base: Those who report history or culture as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

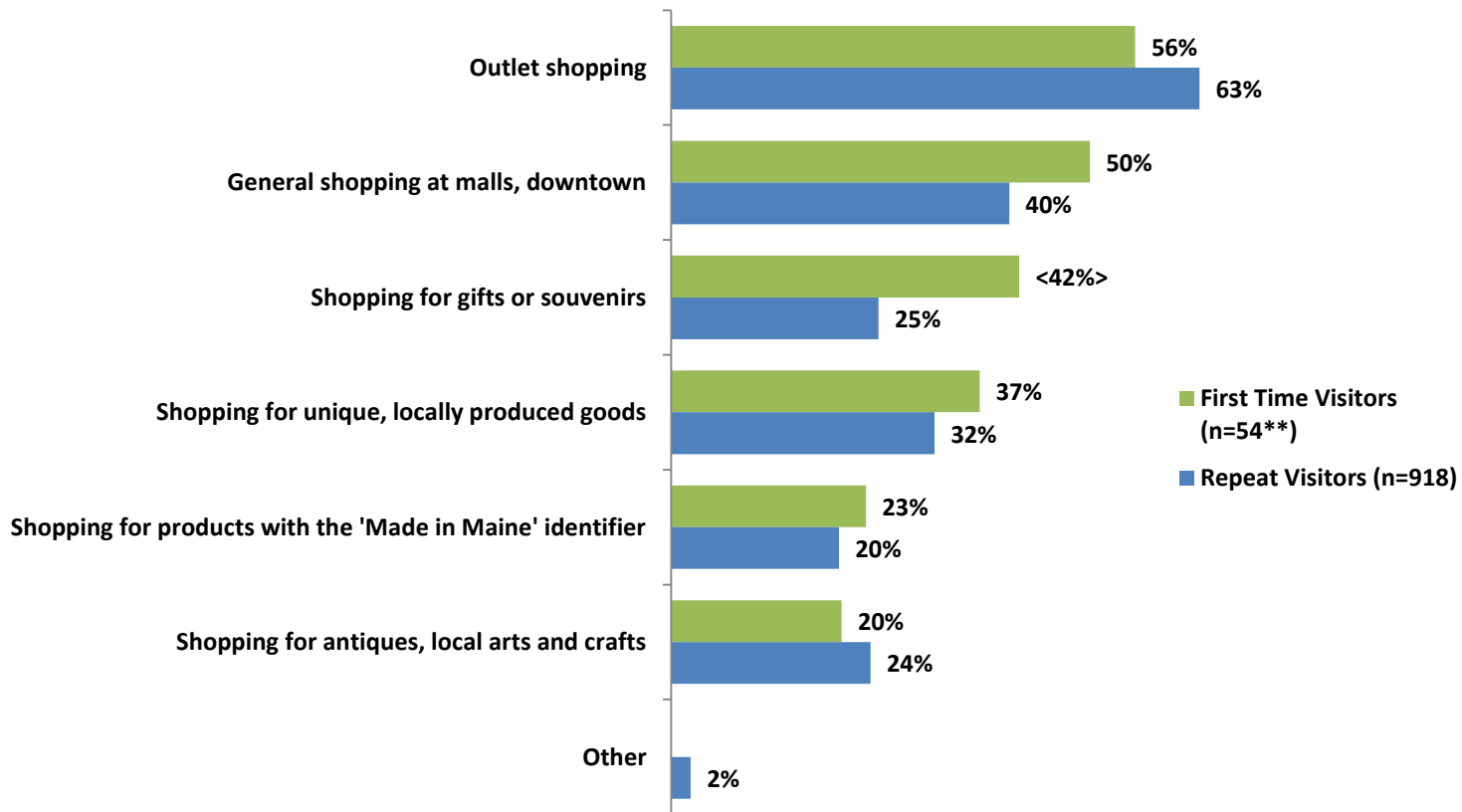
**Please note extremely small sample size.

Among first-time day visitors interested in shopping, the majority do some *outlet shopping* while in Maine.

- *Shopping for gifts or souvenirs* is more common among first-time day visitors than it is among those who have visited Maine before (42% versus 25%).

Shopping Activities*

Base: Those who report shopping as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

< > indicates a significant difference between subgroups at the 95% confidence level.

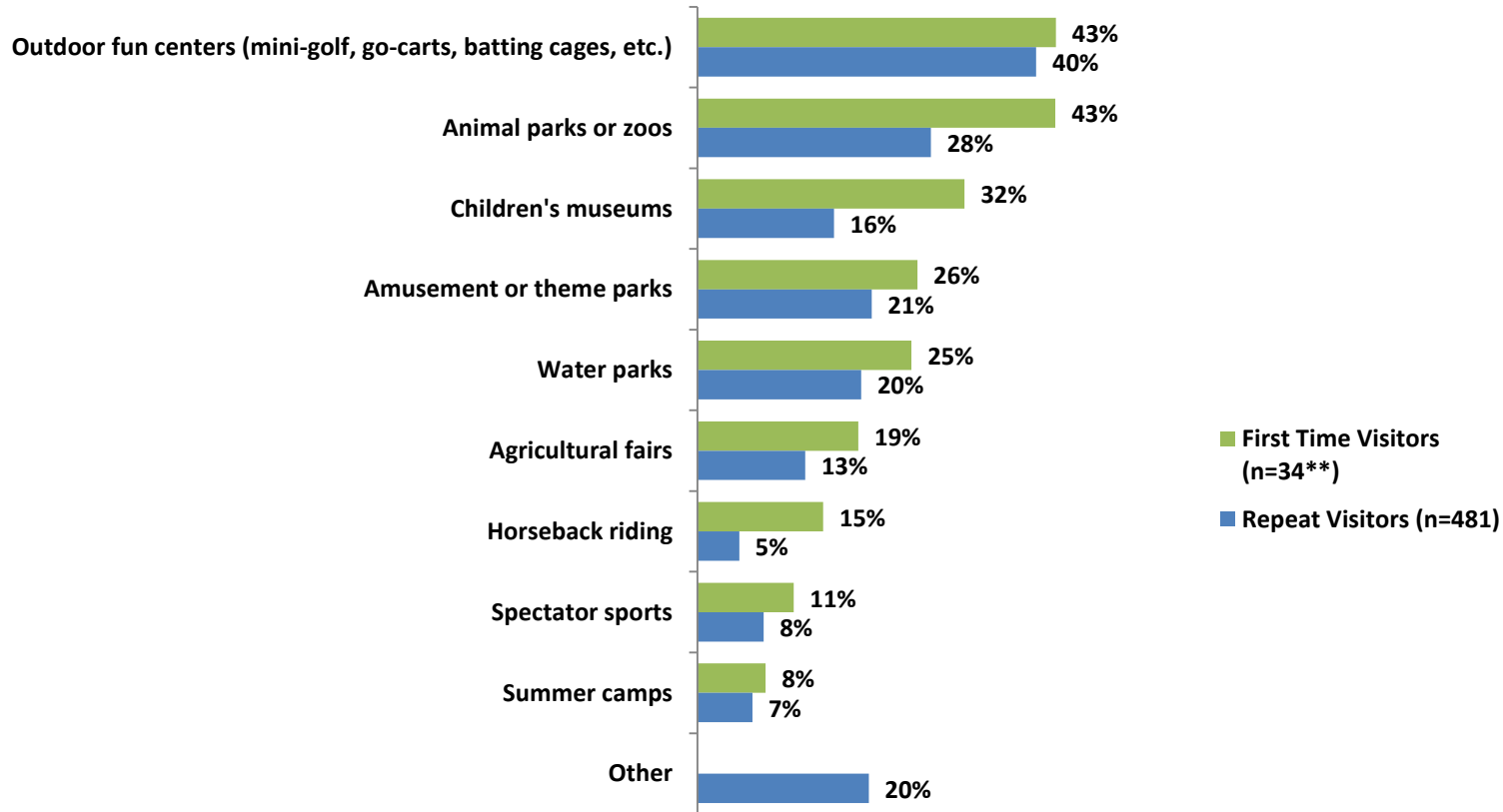
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Outdoor fun centers and animal parks/zoos are the most popular family fun/children's activities among first-time day visitors.

Family Fun/Children's Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

< > indicates a significant difference between subgroups at the 95% confidence level.

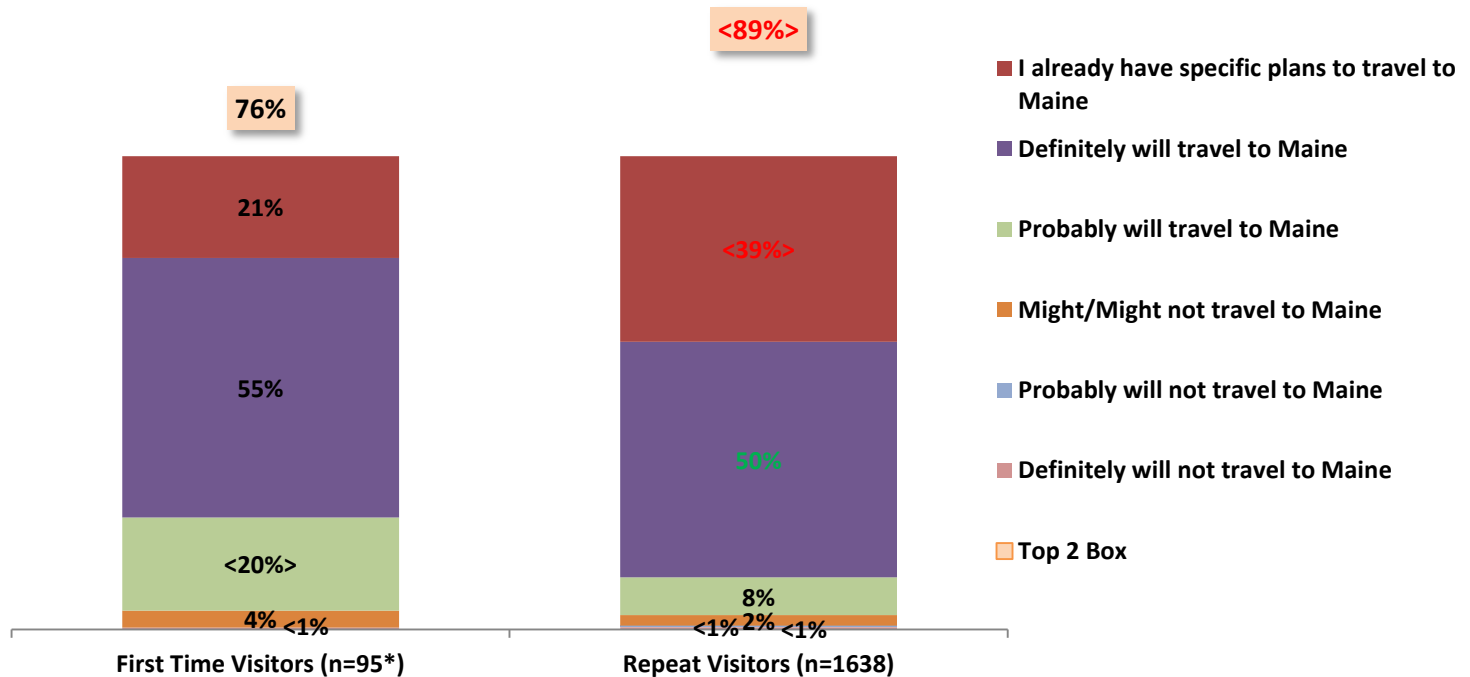
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note extremely small sample size.

Three-fourths of first-time day visitors express the intent to travel to Maine again in the next two years.

- Repeat visitors are even more likely than first-time visitors to indicate that they either *already have specific plans to visit Maine* again or that they *definitely will travel to Maine* (89% versus 76%).

Future Likelihood to Travel to Maine



Day Q30. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year. <> indicates a significant difference between subgroups at the 95% confidence level.

**Please note small sample size.*



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