

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

Canadian Visitors

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
 - 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 December 2013 and December 2014, and highlights data on **Canadian visitors to Maine**. Reported results are based on:
 - 465 Canadian overnight visitors, and
 - 167 Canadian day visitors.
- Statistically significant differences between 2013 and 2014 are highlighted for Canadian 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.

Canadian Overnight Visitors: *Traveler Description*



Overnight Visitor Demographics

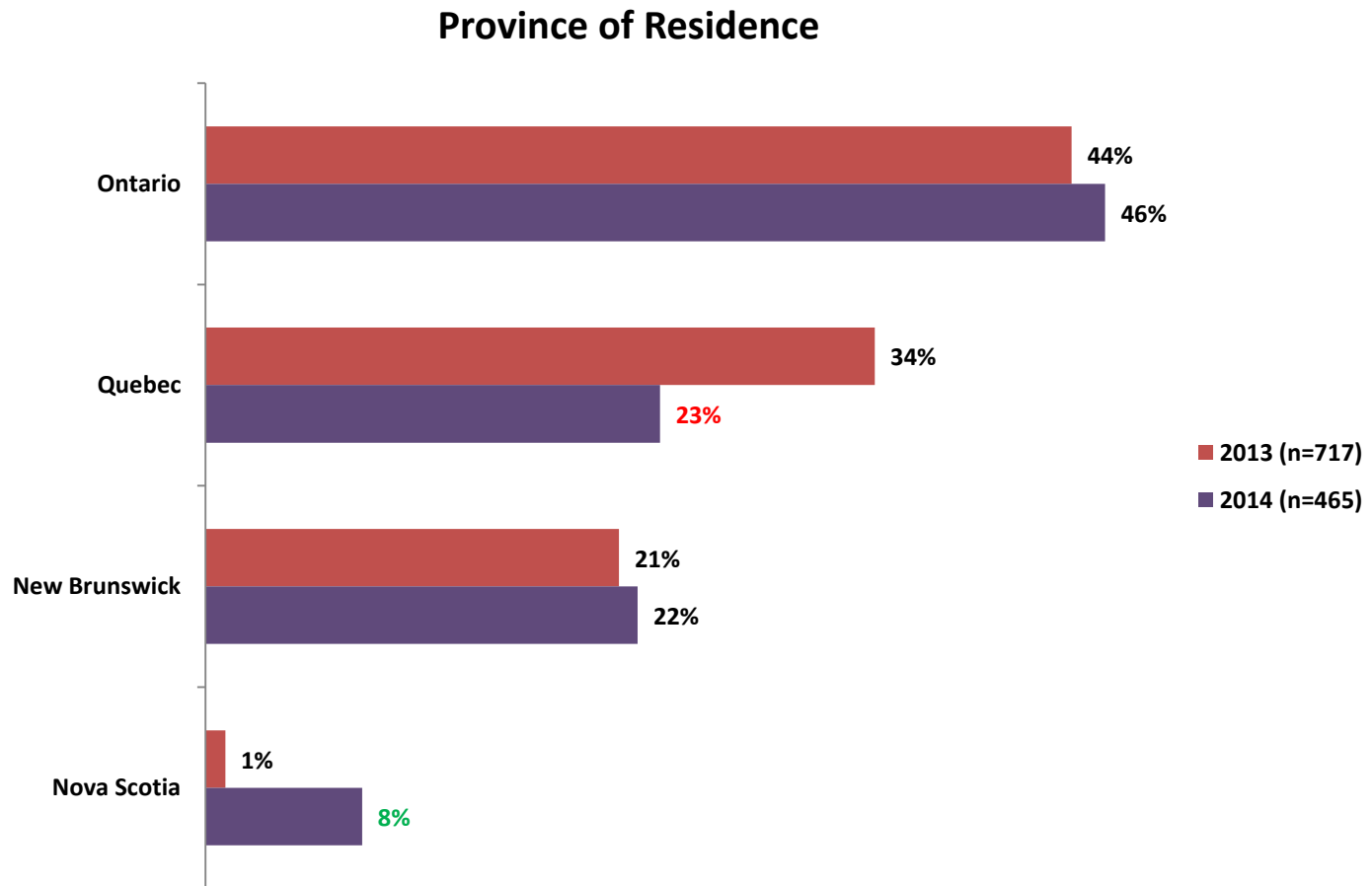
- Canadian overnight visitors are 43 years old, on average. Average household income among these visitors is around \$100,000, and three in four have a college degree. Nearly two-thirds are employed full-time.

Overnight Canadian Visitors	2013 (n=717)	2014 (n=465)
Age:		
< 35	14%	29%
35 - 44	19%	27%
45 - 54	24%	24%
55 +	43%	21%
Mean Age (Years)	50.8	43.5
Income:		
< \$50,000	8%	19%
\$50,000 - \$99,000	30%	42%
\$100,000 +	51%	39%
Mean Income (Thousands)	\$119,600	\$99,740
Female	36%	55%
College Degree or Higher	82%	75%
Married	62%	62%
Employed Full Time	67%	63%

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

Nearly half of Canadian overnight visitors to Maine are from Ontario, contributing a larger share than other provinces.

- 2014 showed an increase in the proportion of overnight visitors from Nova Scotia over 2013 but a decrease in the proportion from Quebec.

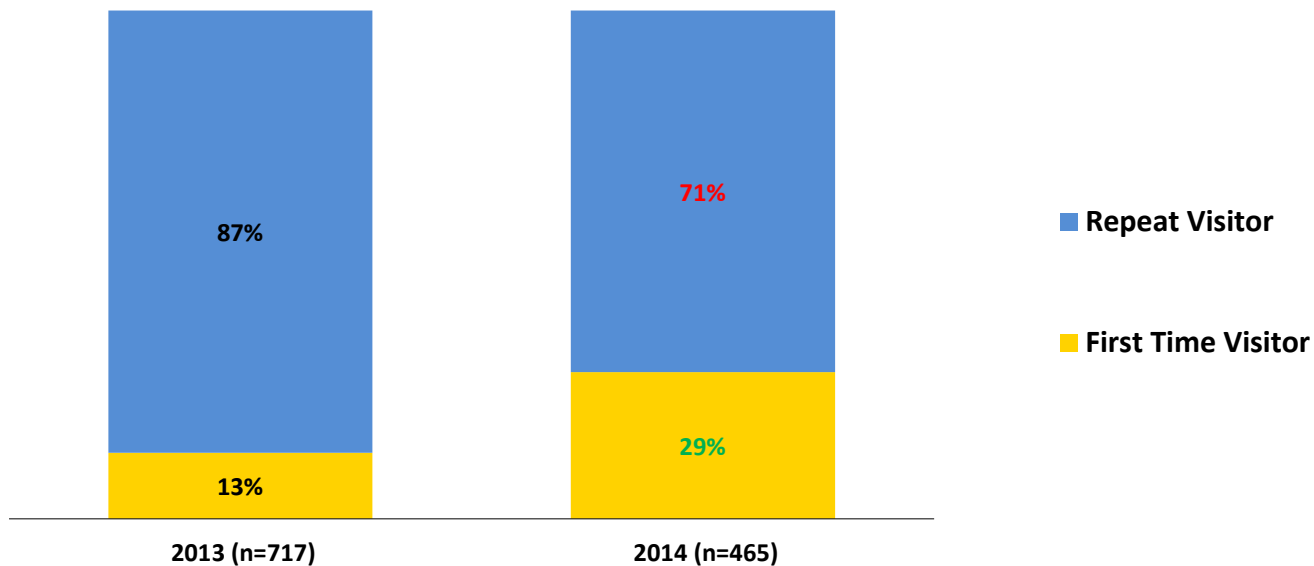


State/ Province of Residence

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

2014 saw an increase in the proportion of Canadian overnight travelers visiting Maine for the first time.

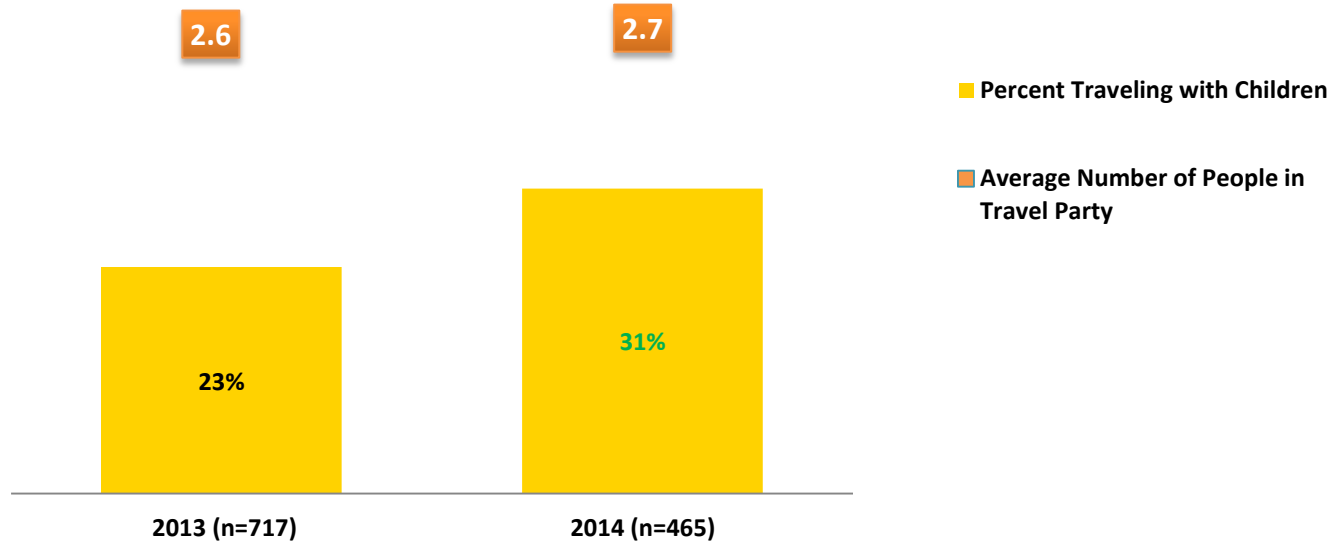
Repeat vs. First Time Visitors



Nearly one-third of Canadian overnight visitors traveled to Maine with children, an increase over 2013.

- Canadian overnight visitors in 2014 traveled in smaller party sizes than U.S. visitors (2.7 versus 3.0).

Travel Party Composition



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?

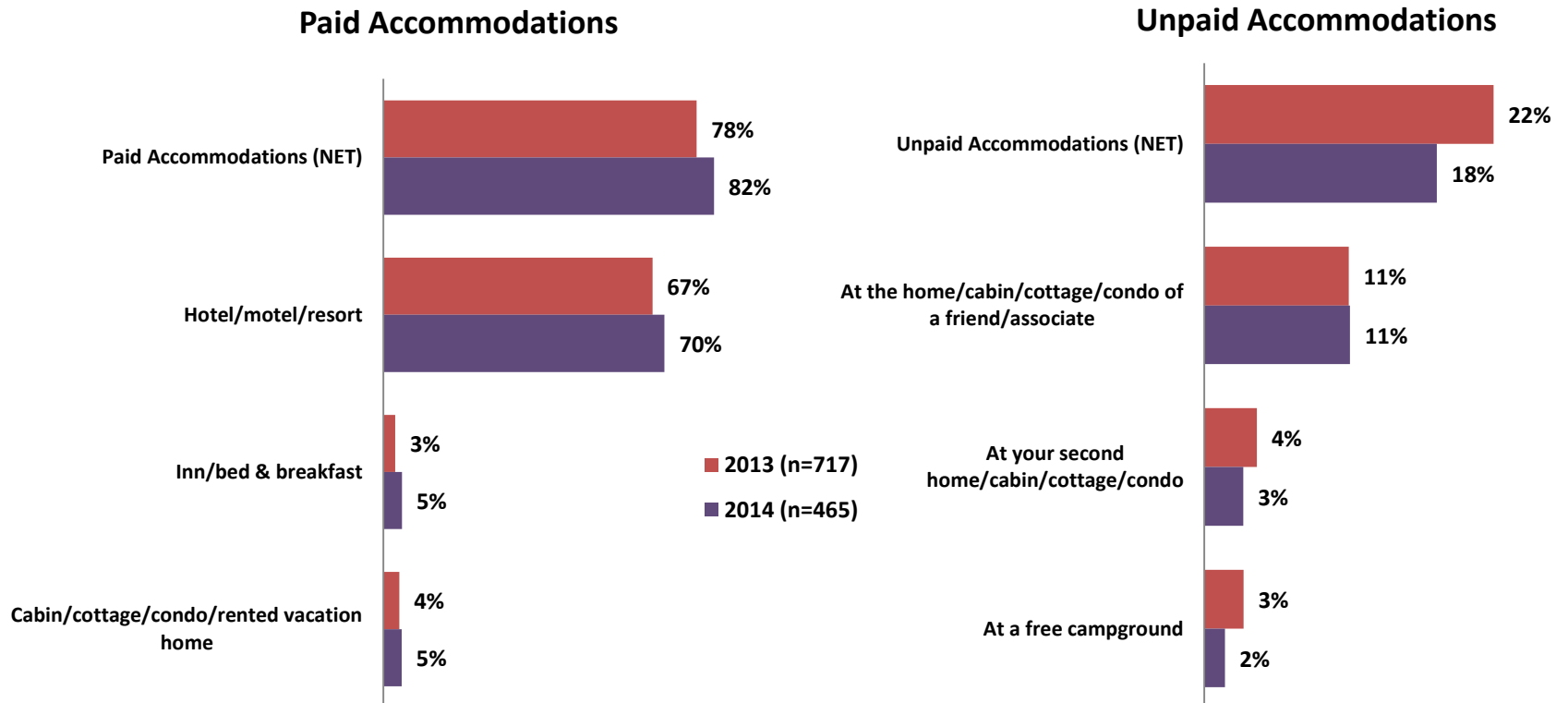
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Canadian Overnight Visitors: *Trip Experience*



The vast majority of Canadian overnight visitors stay in paid accommodations while visiting Maine.

- The proportion of Canadian visitors staying in paid accommodations is significantly greater than the proportion of U.S. visitors (82% versus 69% of US visitors).

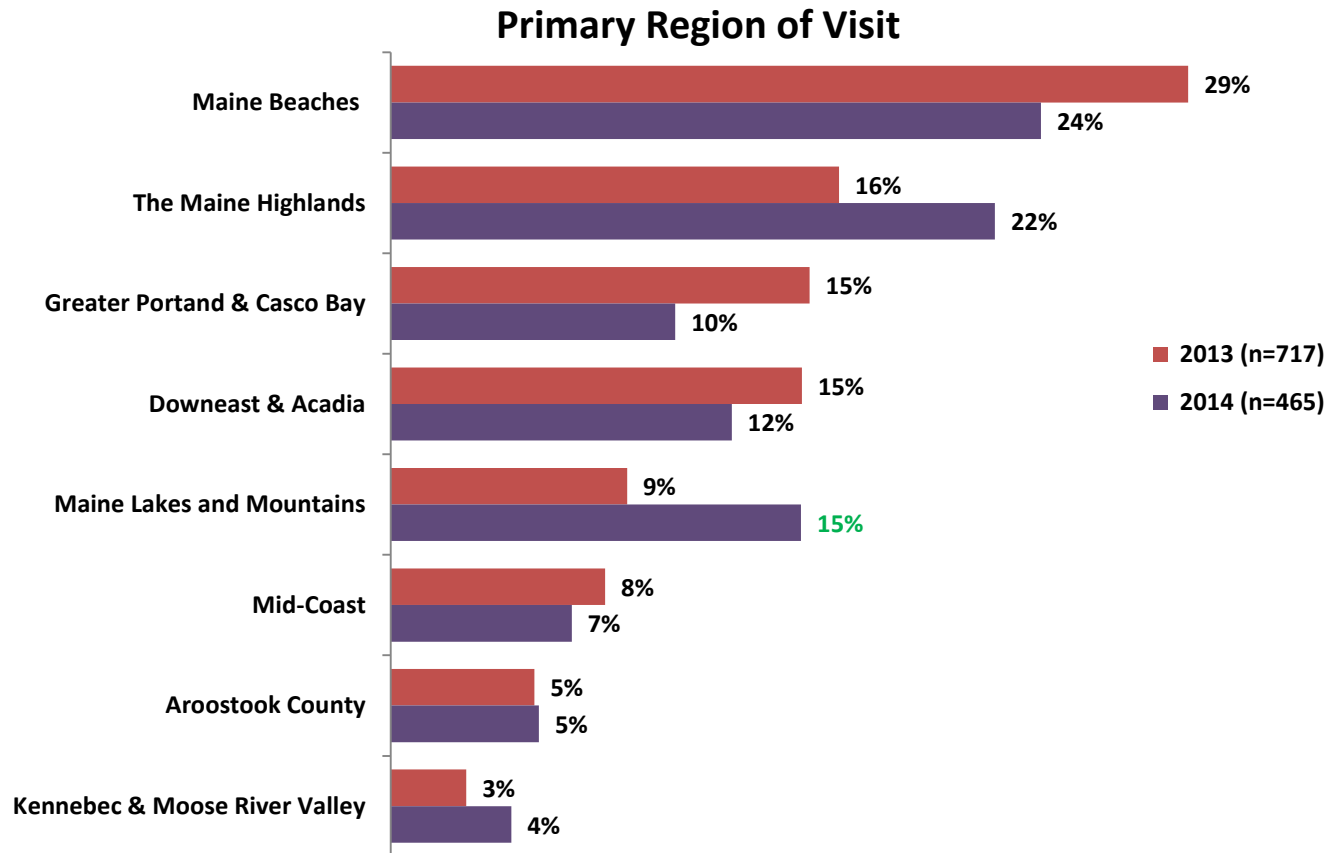


Q21. In which of the following types of accommodations did you spend the most nights on this trip in Maine?

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

The Maine Beaches and Maine Highlands are the regions visited by the largest proportion of Canadian overnight visitors.

- The Maine Lakes and Mountains region saw an increase of Canadian visitors in 2014.

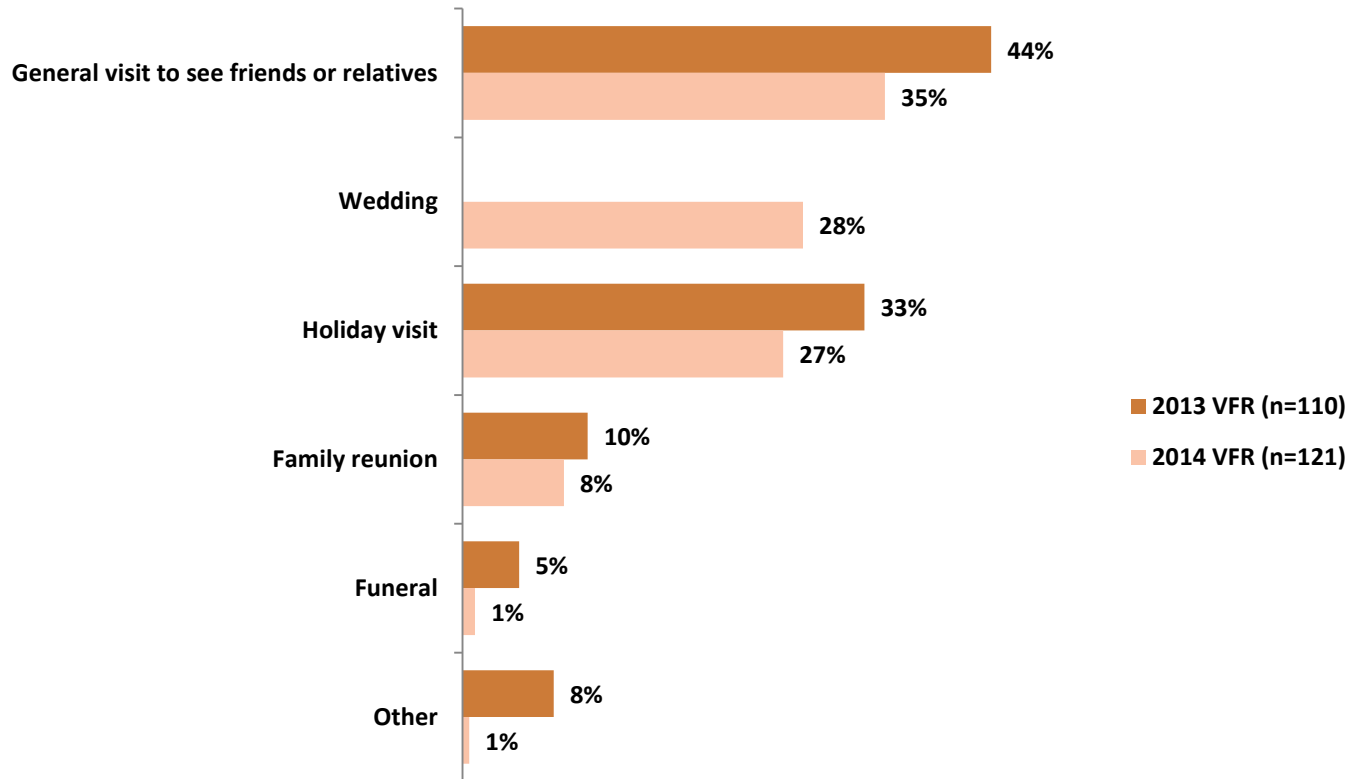


Q22. What region in Maine was your primary destination? (Please check all that apply).

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

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

Primary Purpose of Overnight VFR Trips

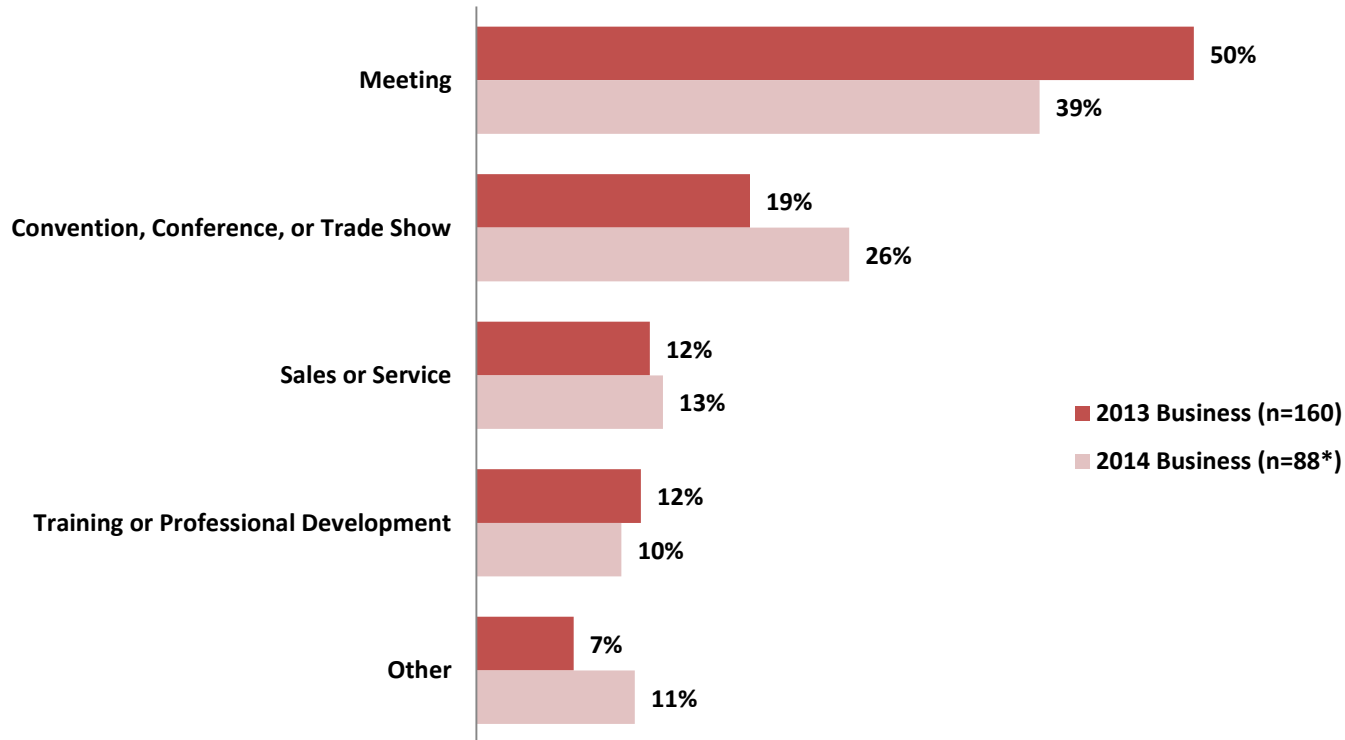


Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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

Canadian business travelers are most likely to be staying in Maine for a general meeting.

Primary Purpose of Overnight Business Trips



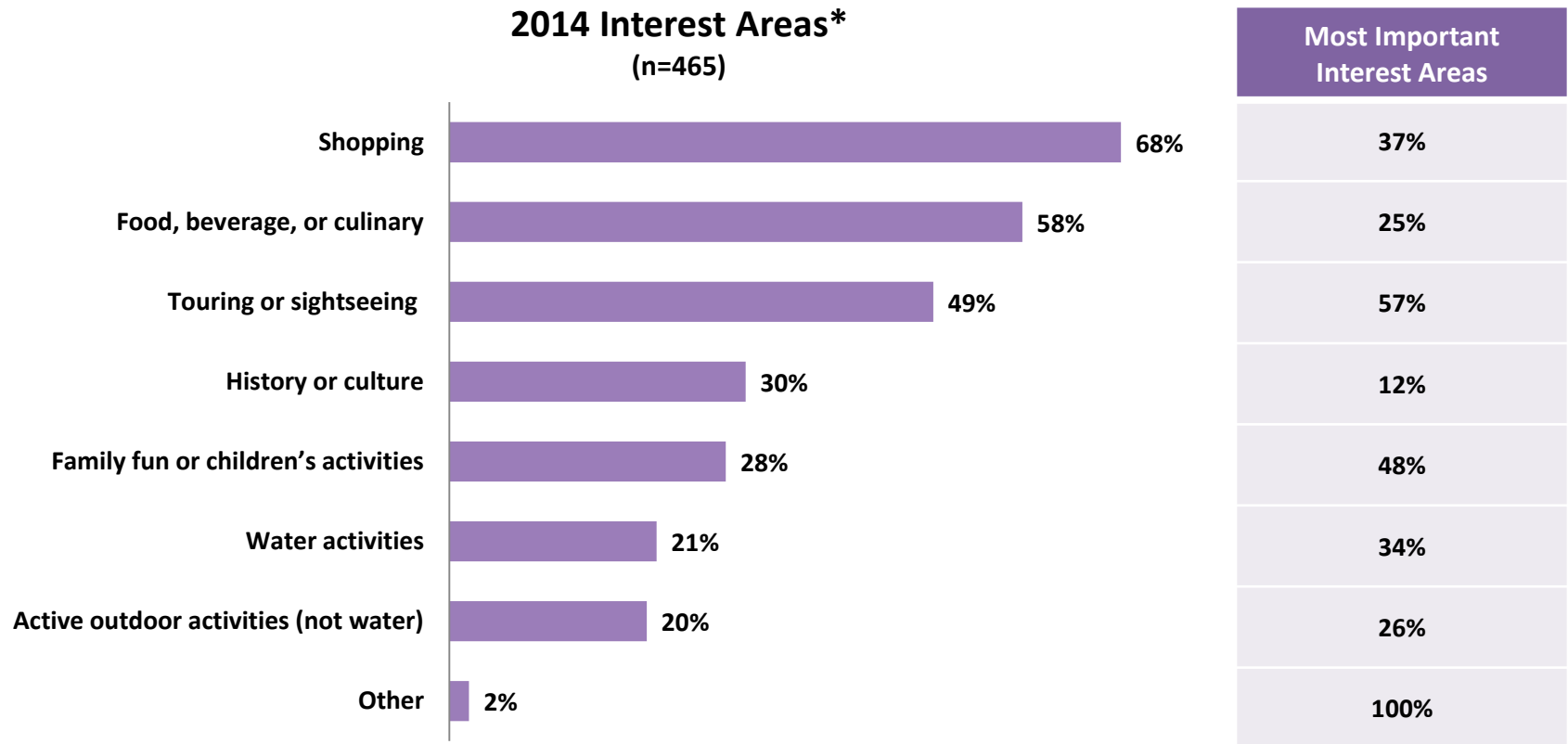
Q8. What was the primary purpose of your most recent business trip in Maine?

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.*

Shopping is the most frequently selected travel interest among Canadian overnight visitors.

- Shopping ranks higher as an interest area among Canadian overnight visitors than for U.S. visitors (68% versus 48%).

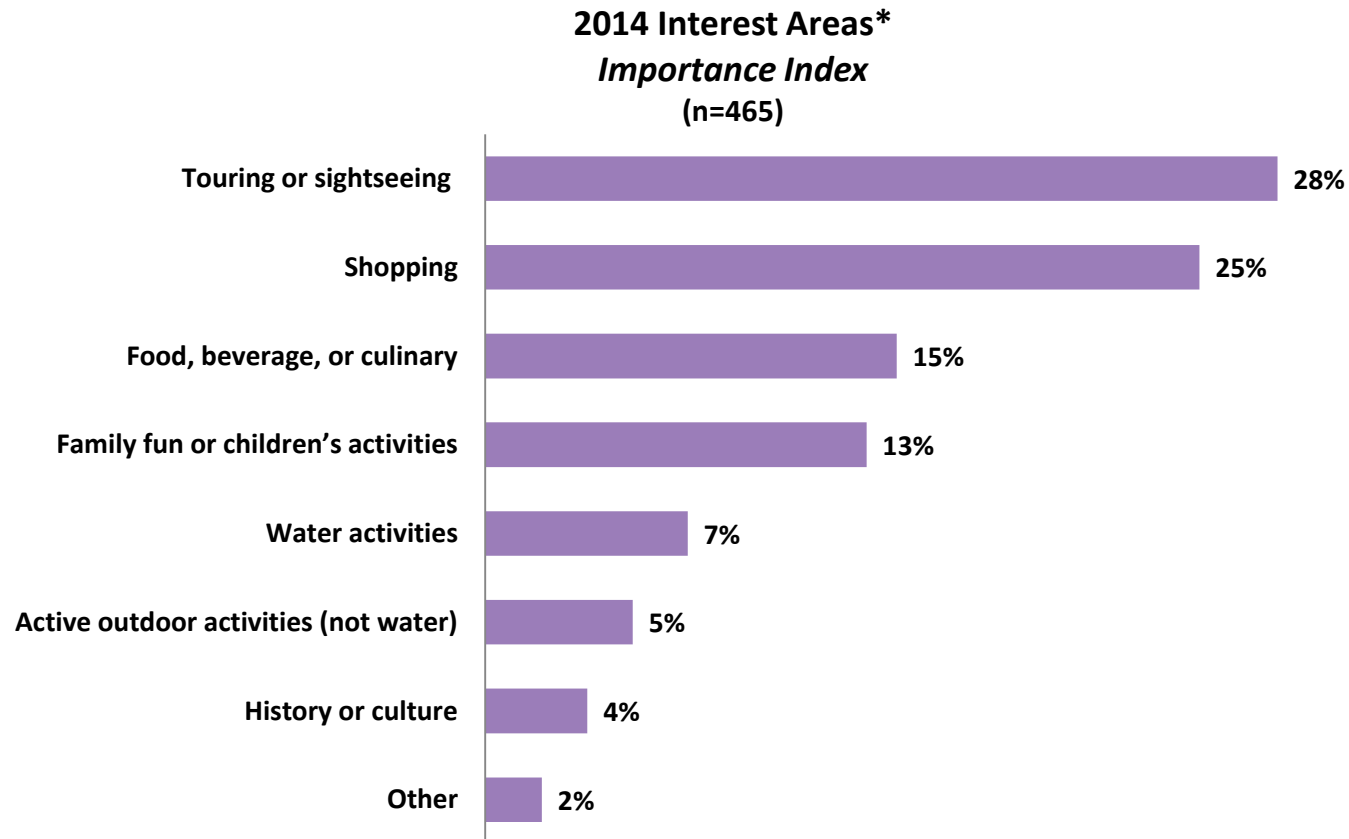


Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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. 16

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

Touring/sightseeing and shopping activities rank highest when analyzing both interest and importance.



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

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

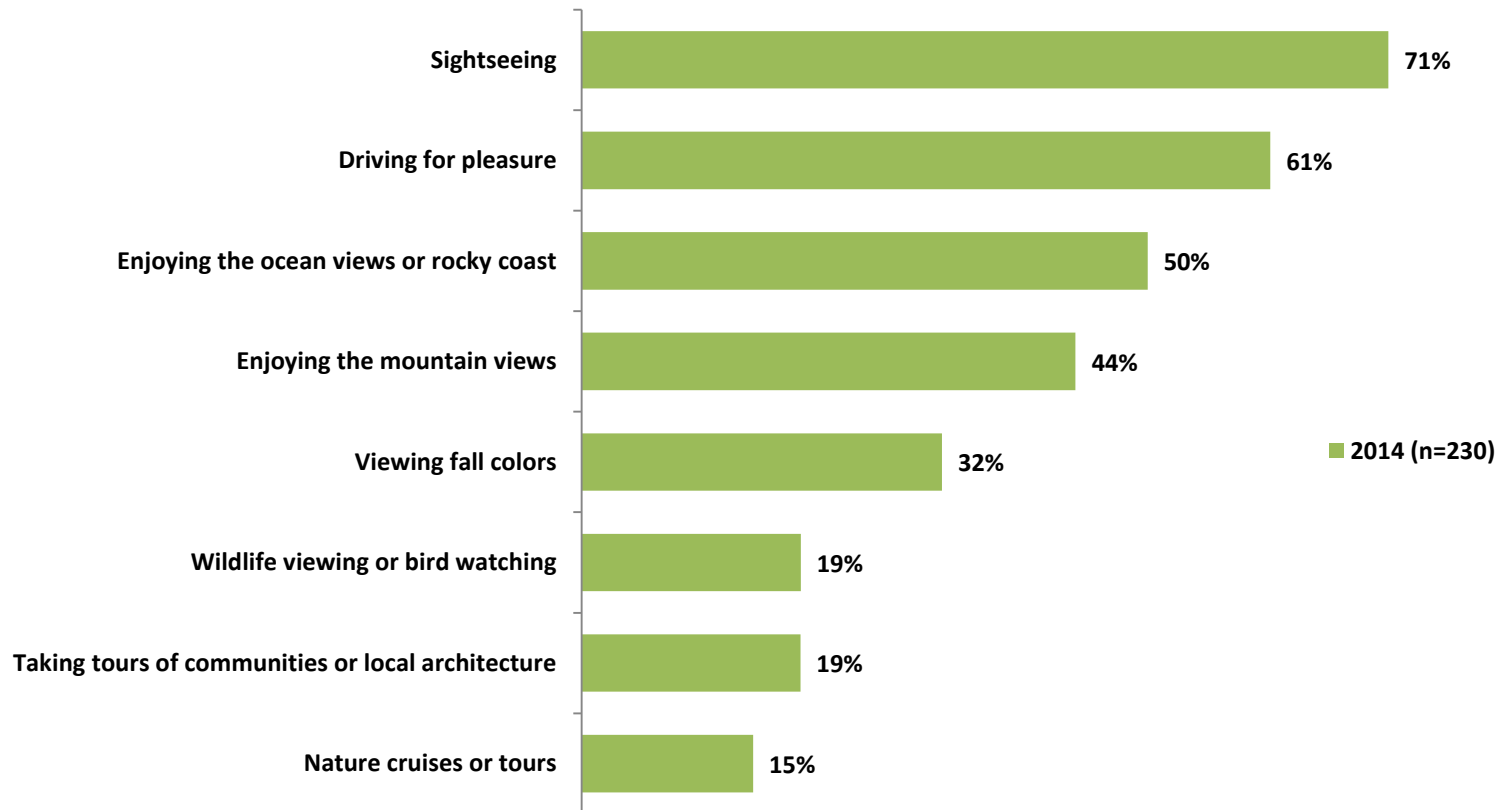
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 17

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

Sightseeing and driving for pleasure are the most common touring or sightseeing activities among Canadian overnight visitors.

Touring or Sightseeing Activities*

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



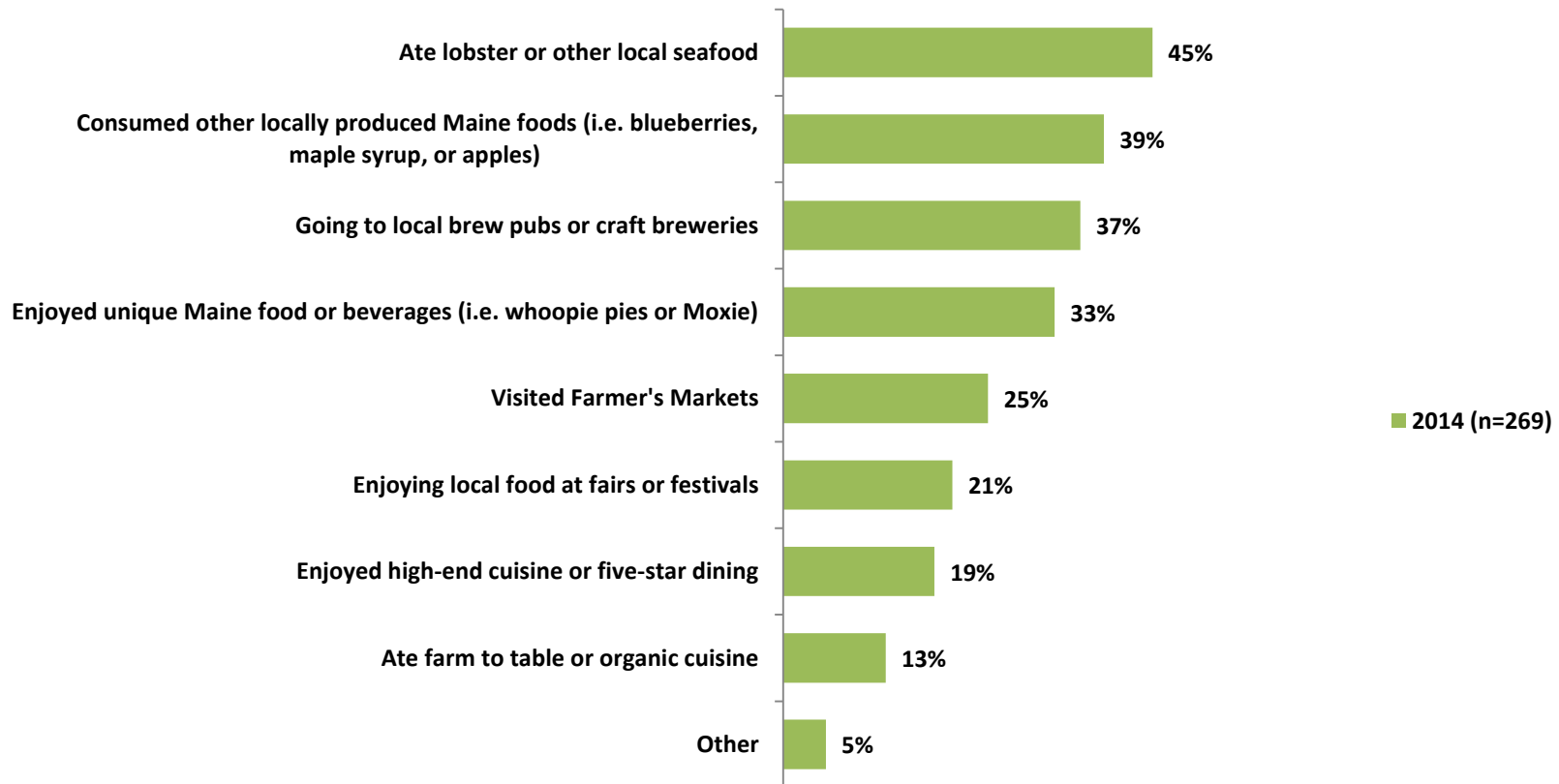
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

For Canadian overnight visitors, the top food, beverage or culinary activity is *eating lobster or other local seafood*.

Participated in Food, Beverage, or Culinary Activities*

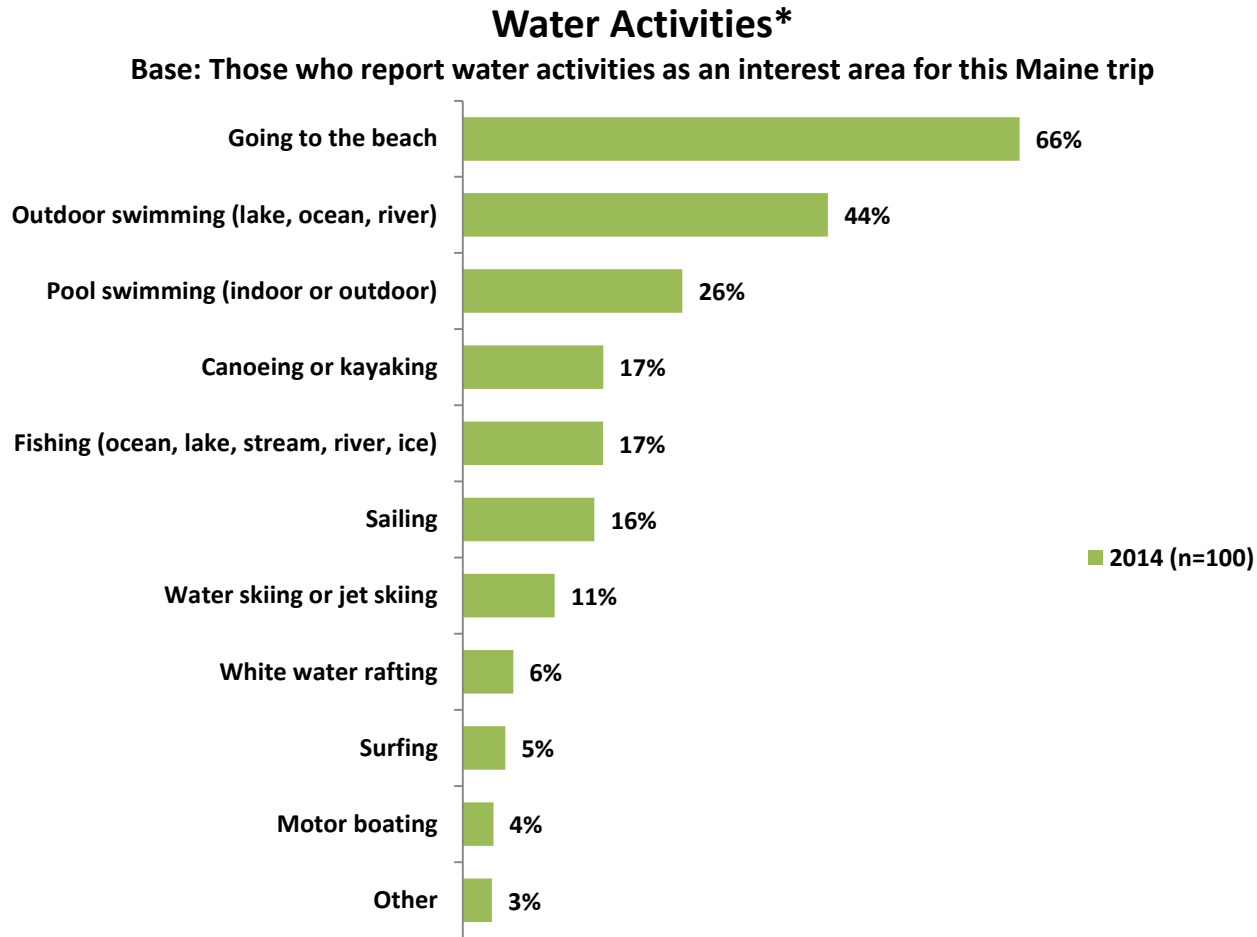
Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



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

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

Two-thirds of Canadian overnight visitors interested in water activities spent time at the *beach* while in Maine.



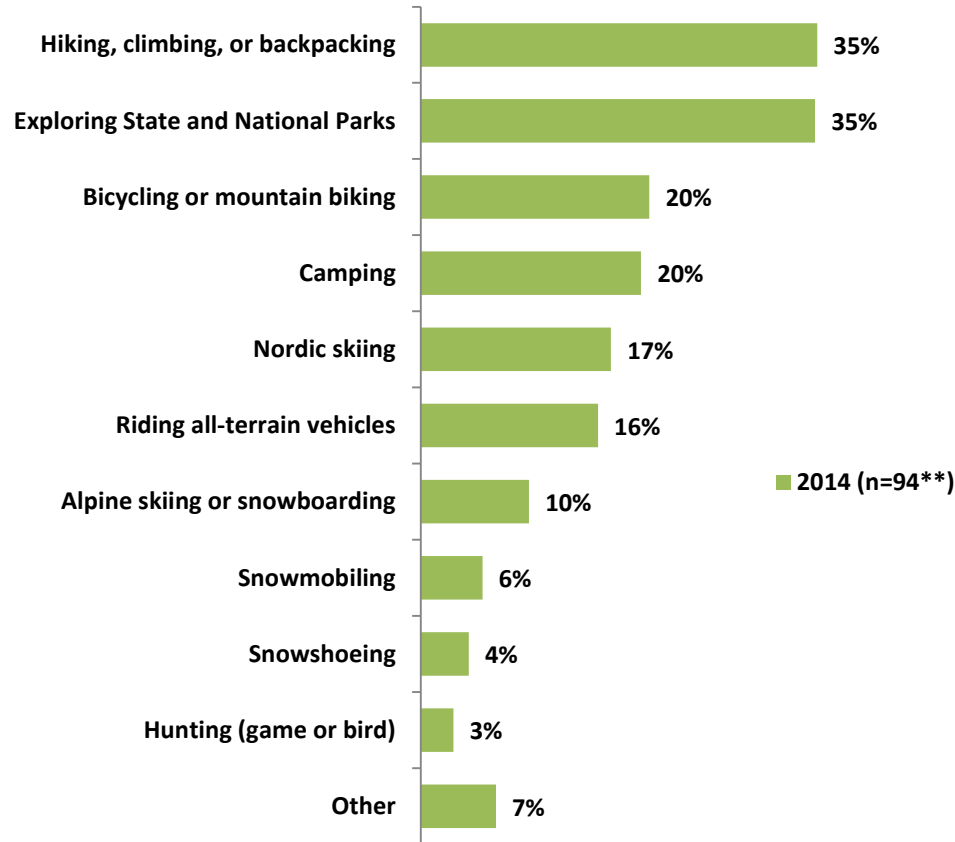
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

Canadian overnight visitors with outdoor activity interests are most likely to go *hiking/climbing/backpacking* or *exploring State/National Parks*.

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.*

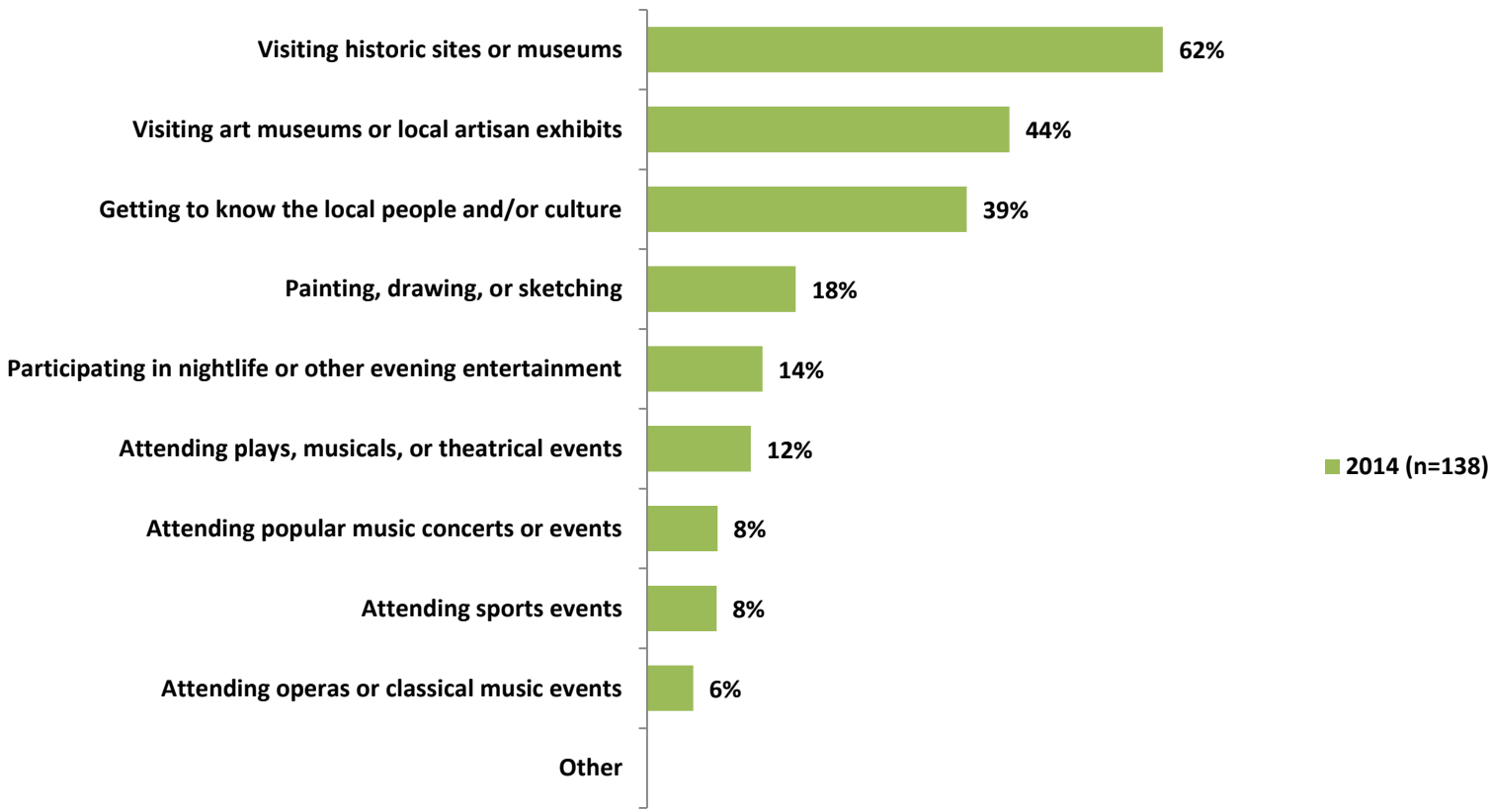
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Nearly two-thirds of Canadian visitors interested in history or culture activities visit historic sites or 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.

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

Canadian overnight visitors interested in shopping are most likely to do some *general shopping at malls or downtown*.

- Among those interested in shopping, a much higher proportion of Canadian overnight visitors did some *general shopping at malls or downtown* than U.S. visitors (63% versus 34%).

Shopping Activities*

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



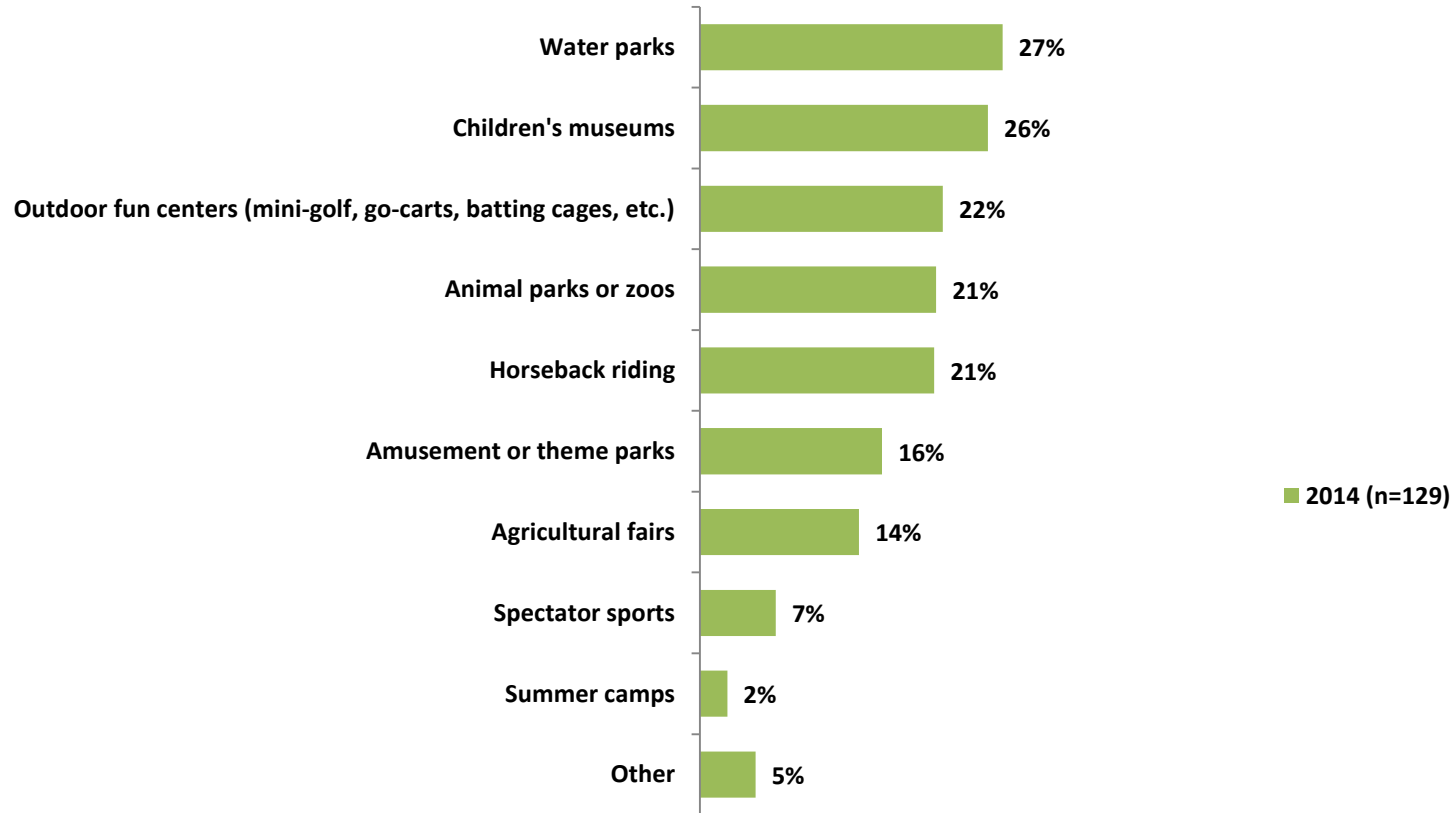
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

Water parks and children's museums are the most popular family fun/children's activities among Canadian overnight visitors to Maine.

Family Fun/Children's Activities*

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

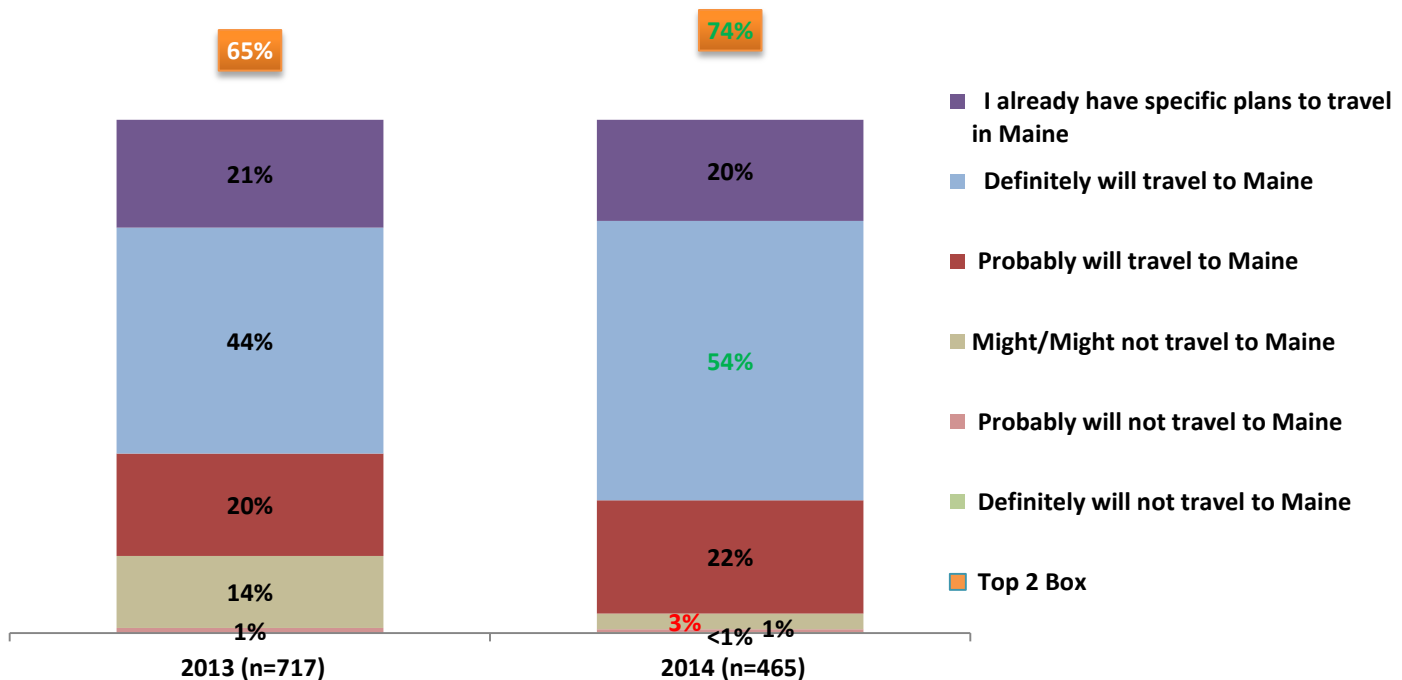


Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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

Three-fourths of Canadian overnight visitors plan to travel to Maine again, an increase over 2013.

Future Travel Likelihood



Q38. 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.

Canadian Day Visitors: *Traveler Description*



Day Visitor Demographics

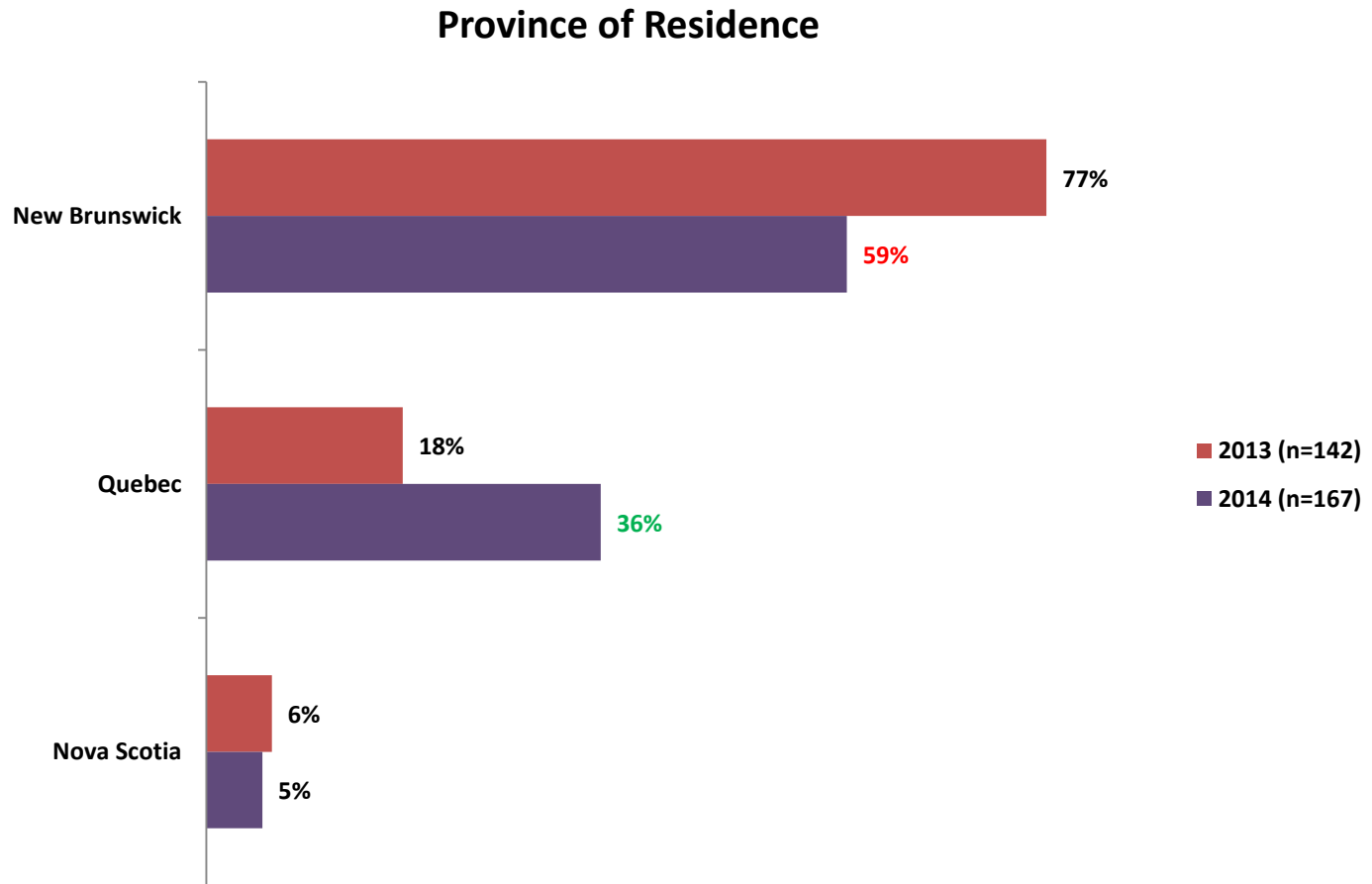
- Canadian day visitors average about 47 years old, with annual household incomes averaging just under \$100,000. Two-thirds have a college degree, and nearly two-thirds are employed full-time.

Canadian Day Visitors	2013 (n=142)	2014 (n=167)
Age:		
< 35	8%	20%
35 - 44	18%	23%
45 - 54	20%	30%
55 +	54%	27%
Mean Age (Years)	54.1	46.8
Income:		
< \$50,000	15%	18%
\$50,000 - \$99,000	40%	42%
\$100,000 +	45%	40%
Mean Income (Thousands)	\$102,860	\$98,220
Female	37%	43%
College Degree or Higher	70%	65%
Married	80%	65%
Employed Full Time	56%	61%

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

New Brunswick continues to supply the highest proportion of Canadian day visitors to Maine.

- 2014 showed a shift in Canadian day visitor origin as compared to 2013, with a lesser proportion of day visitors arriving from New Brunswick and a greater proportion arriving from Quebec.



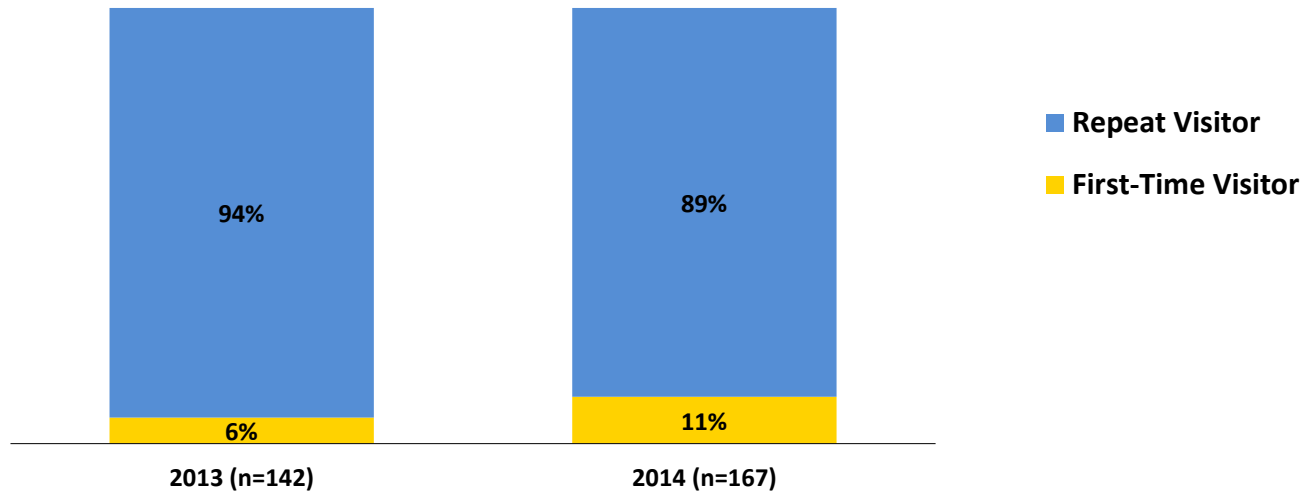
Q2. In what State or Province do you reside?

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

Only one-tenth of Canadian day visitors are in Maine for the first time.

- U.S. day visitors are much less likely to be visiting Maine for the first time (5%).

Repeat vs. First Time Visitors

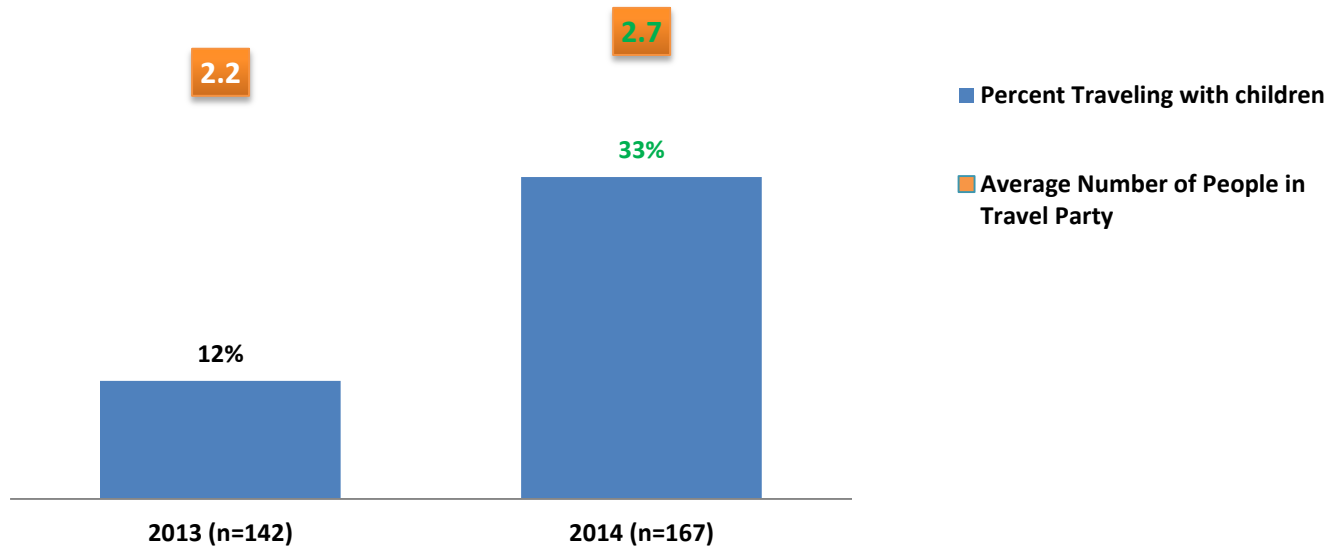


Q10. Was this your first trip to Maine?

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

Similar to overnight visitors, Canadian day visitors travel in parties of two to three people, and one-third travel with children.

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

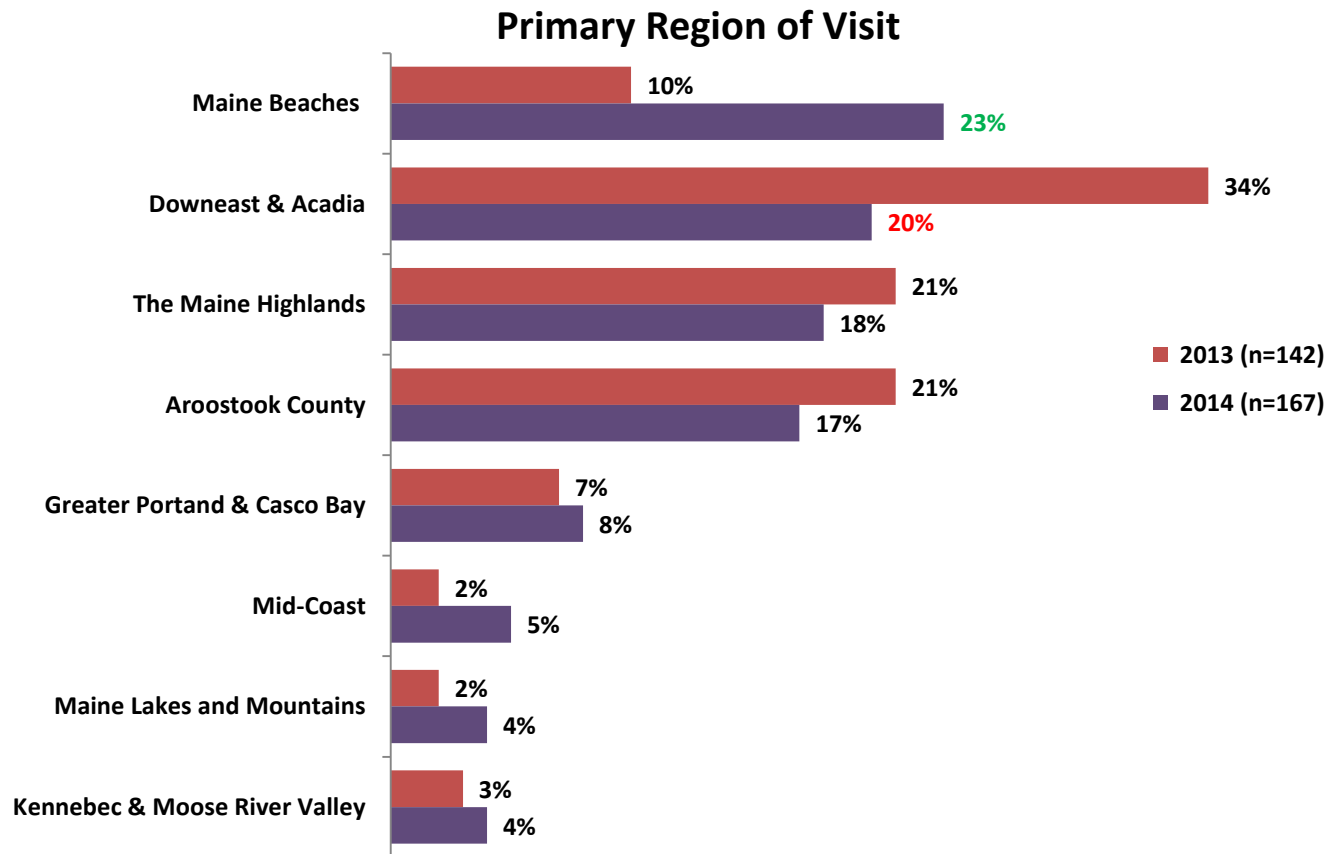
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Canadian Day Visitors: *Trip Experience*



The Maine Beaches and Downeast/Acadia regions draw the largest proportion of Canadian day visitors.

- The Maine Highlands and Aroostook County attract the next highest proportions of Canadian day visitors.
- Canadian day visitors are more likely than U.S. day visitors to spend time in the *Downeast/Acadia region*, *The Maine Highlands*, and *Aroostook County*.

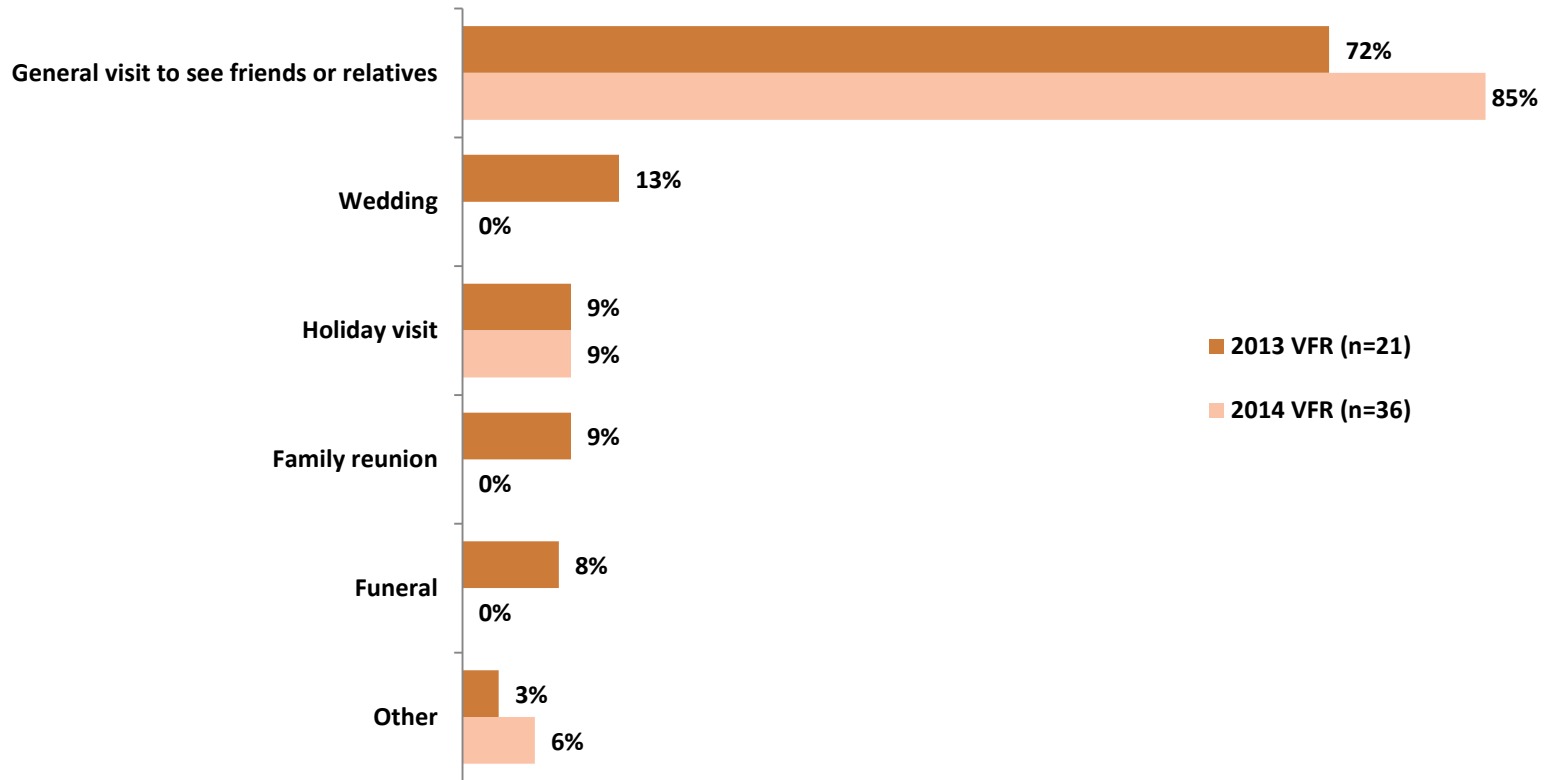


Q20. What region in Maine was your primary destination? (Please check all that apply).

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

The most widely cited primary trip purpose for Canadian VFR day visitors is a general visit to see friends or relatives.

Primary Purpose of Day VFR Trips*



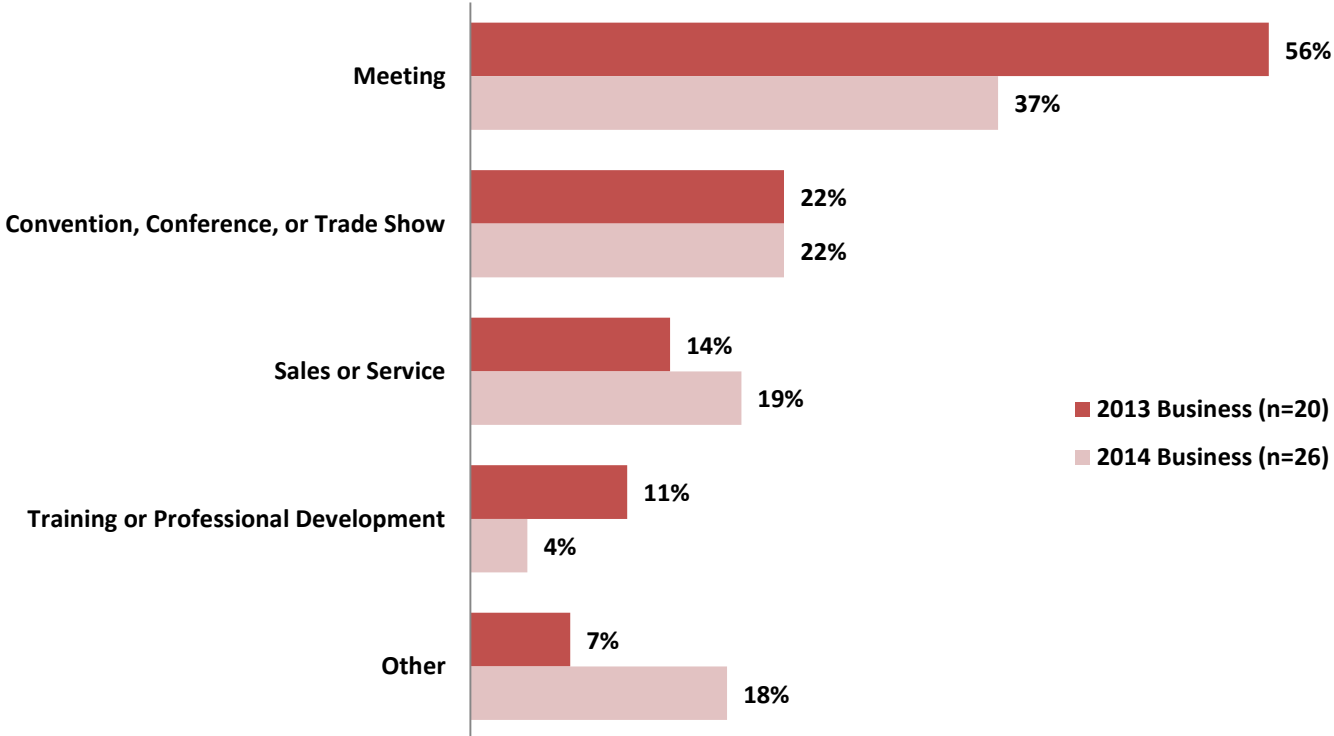
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

*Please note extremely small sample size.

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

Canadian day visitors traveling for business are most likely to be in Maine for a general meeting.

Primary Purpose of Business Day Trips*



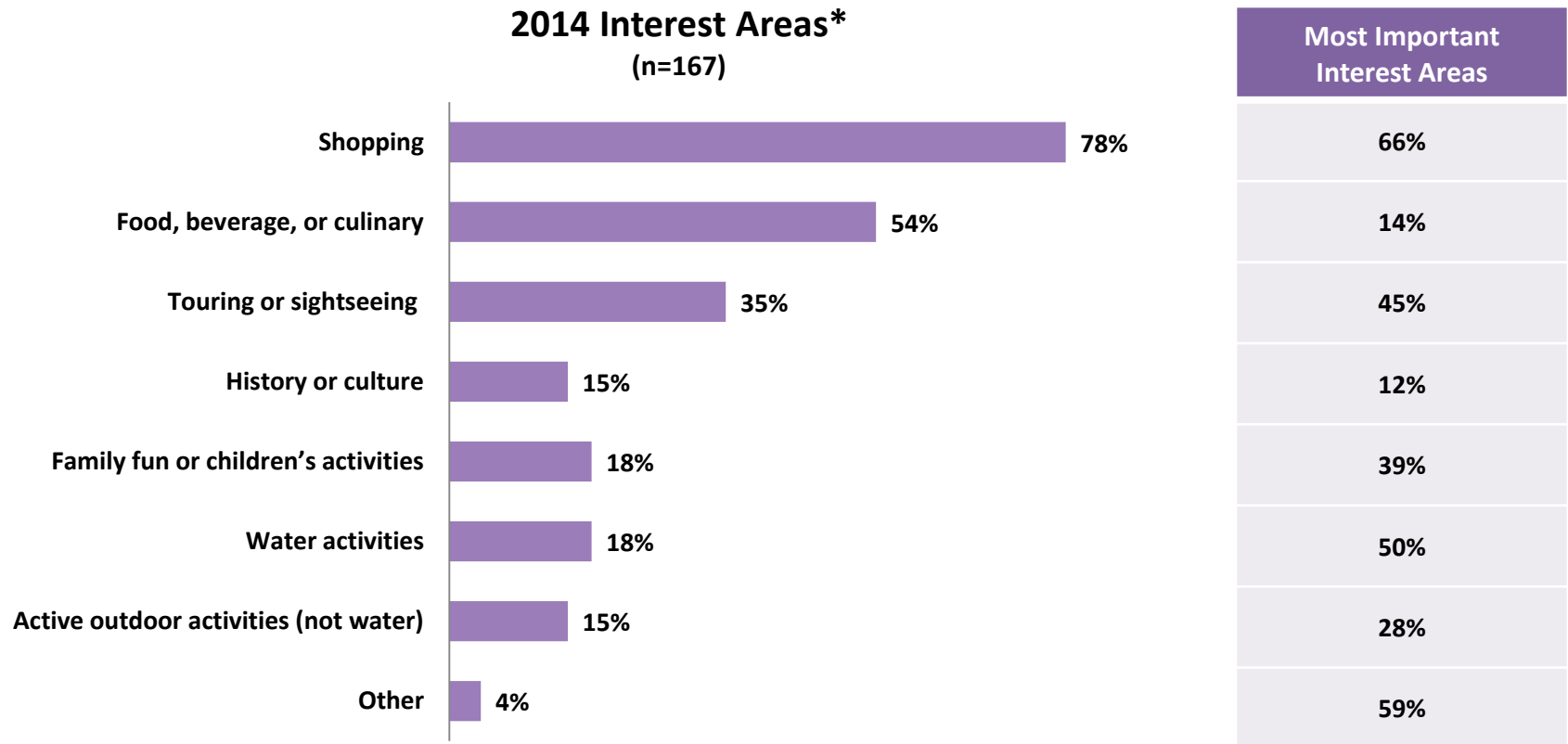
Q8. What was the primary purpose of your most recent business trip in Maine?

**Please note extremely small sample size.*

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

Shopping is the most frequently selected travel interest among Canadian day visitors.

- Similar to overnight visitors, Canadian day visitors are much more likely than their U.S. counterparts to list *shopping* as an interest area (78% versus 54%).

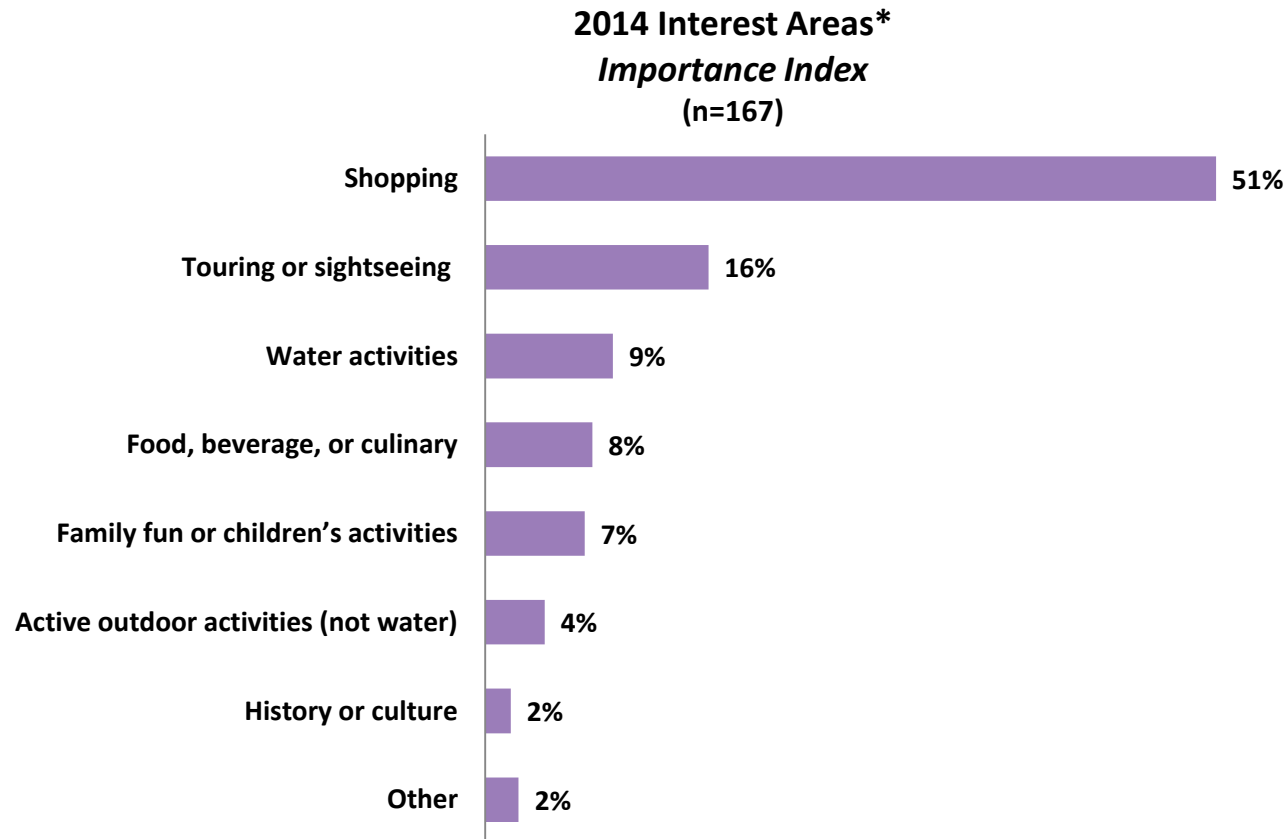


Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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. 35

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

Shopping overwhelmingly ranks highest among Canadian day visitors when analyzing both interest and importance.



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? Please check all that apply.

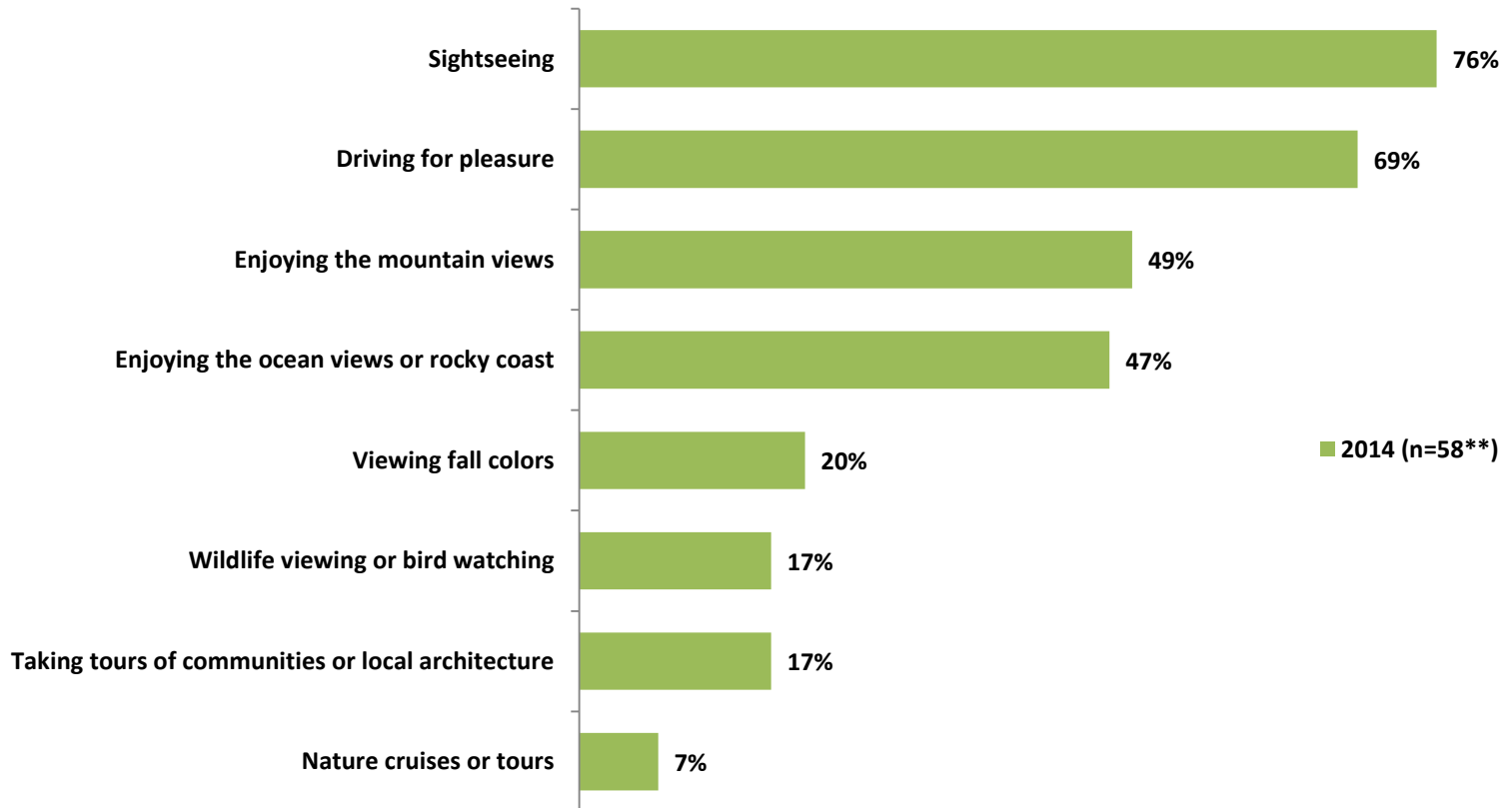
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 36

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

Sightseeing and driving for pleasure are the most common touring or sightseeing activities among Canadian 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.*

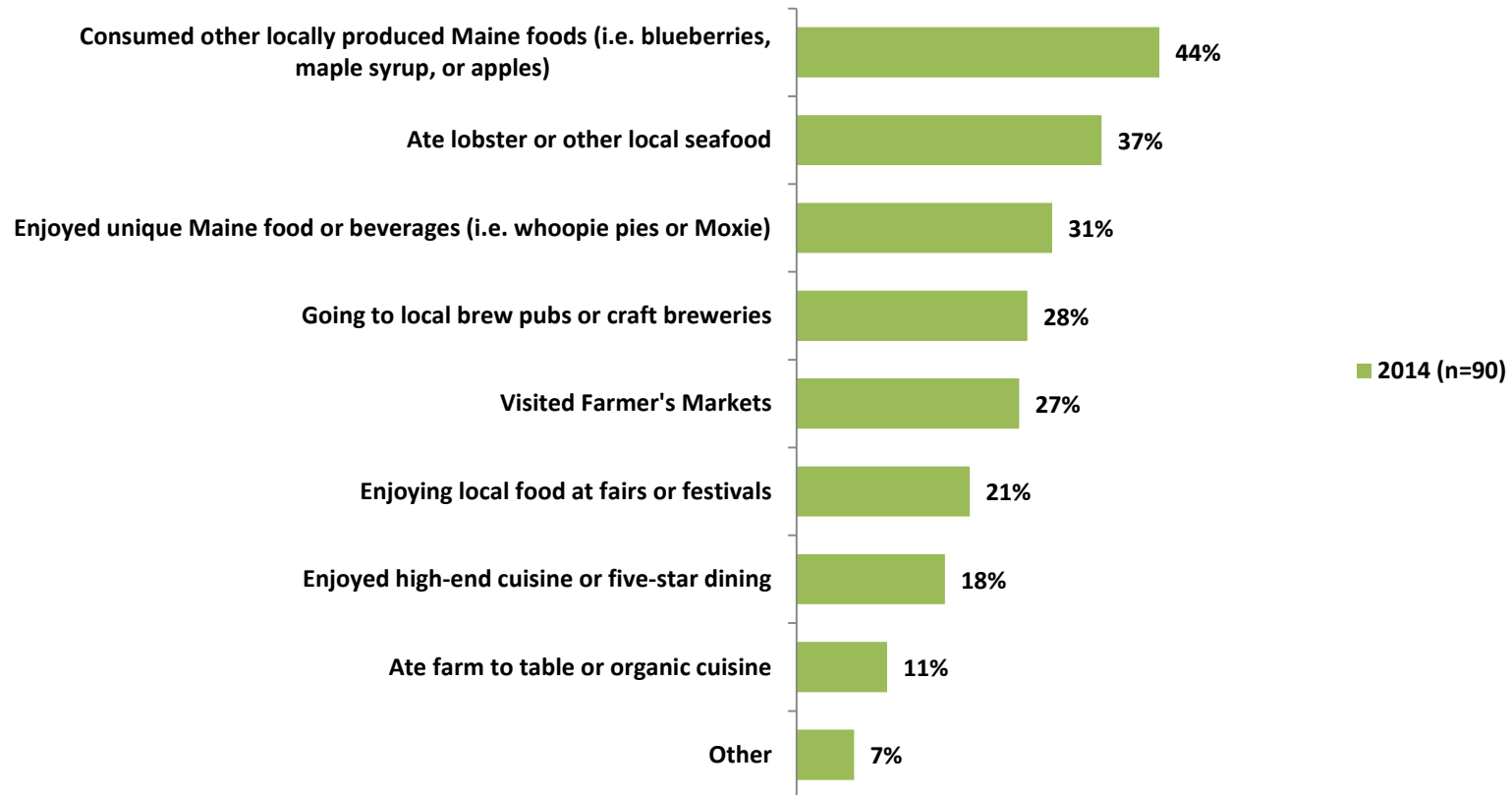
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

The top food/beverage/culinary activity for Canadian day visitors is consuming other locally produced Maine foods.

Participated in Food, Beverage, or Culinary Activities*

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



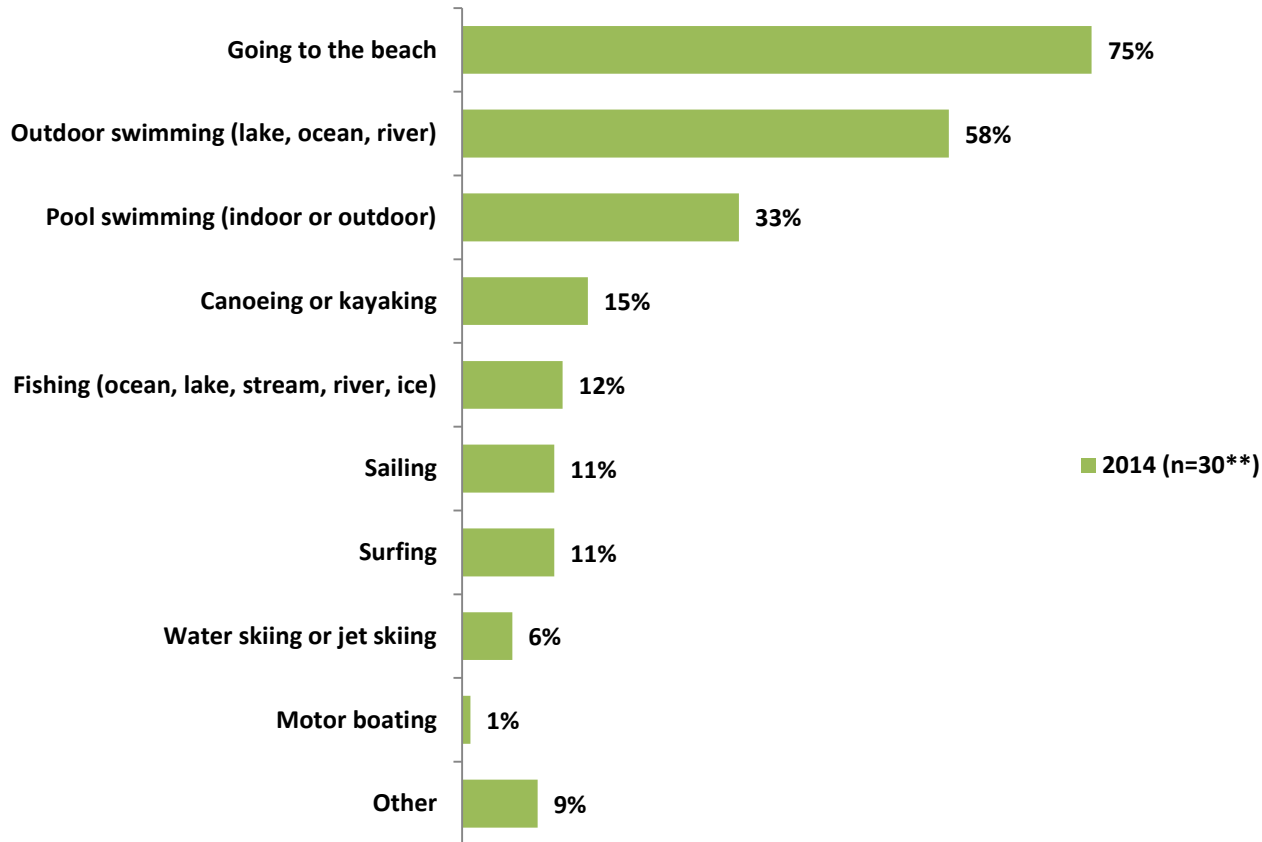
Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

Water Activities*

Base: Those who report water 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.*

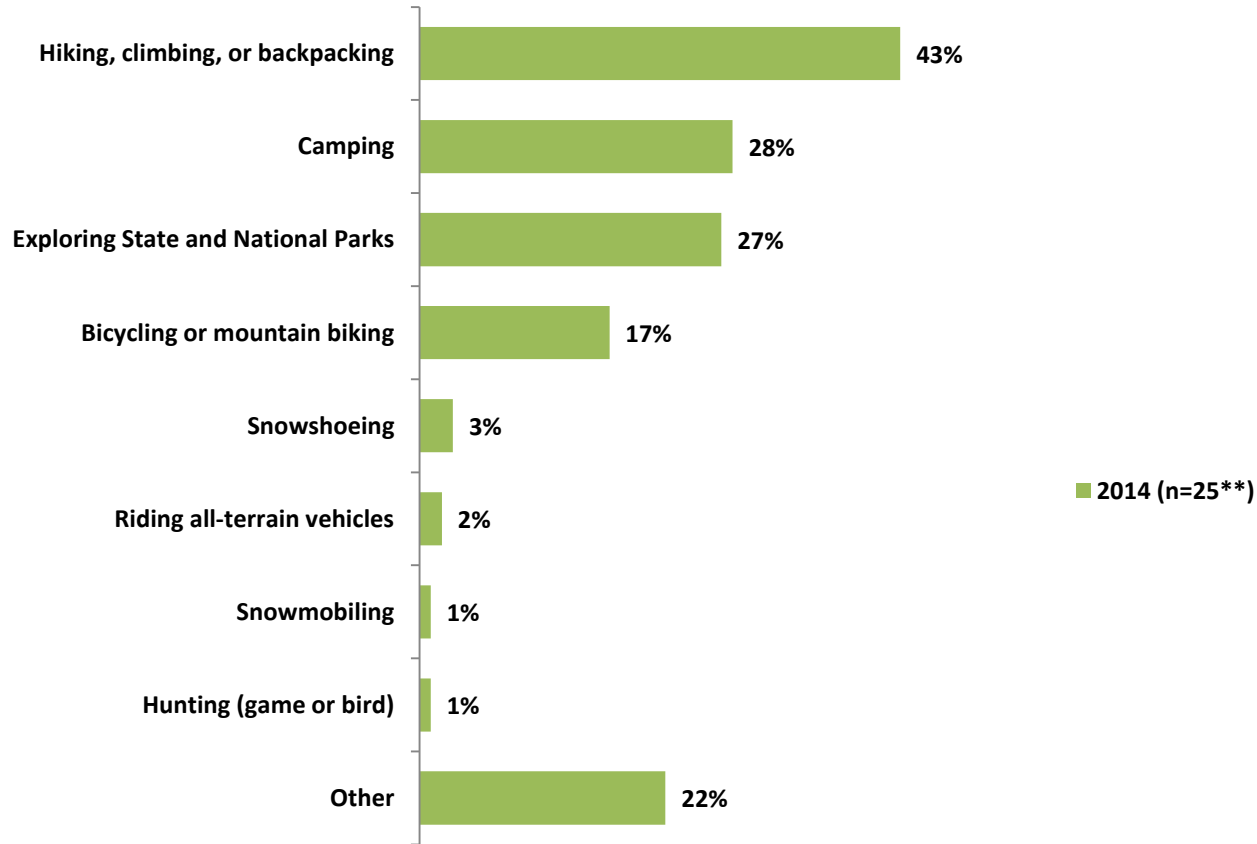
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note extremely small sample size.

Hiking/climbing/backpacking is the most common activity among Canadian day visitors interested in outdoor activities.

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.*

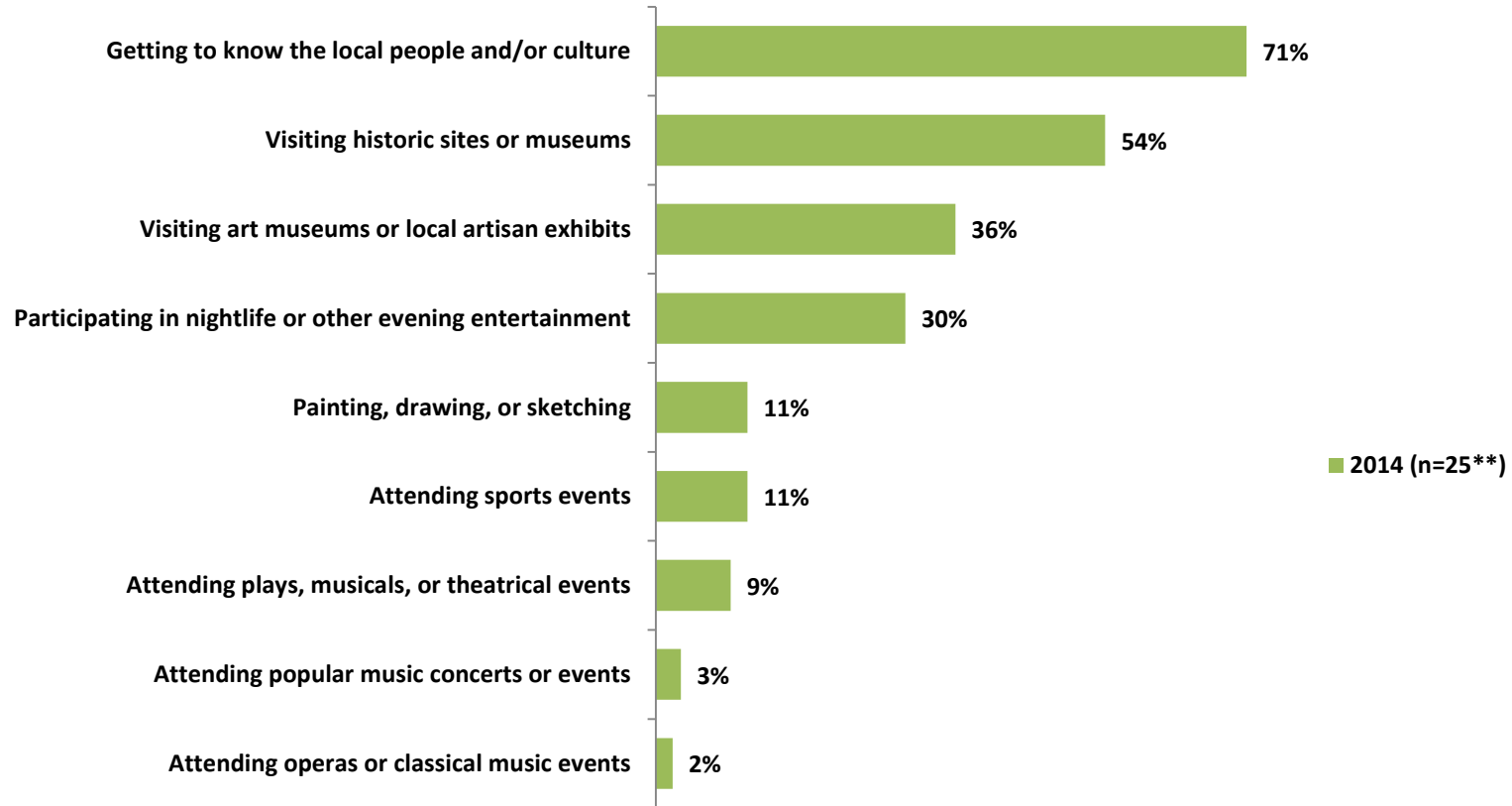
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note extremely small sample size.

Seven in ten Canadian day visitors interested in history or culture enjoyed *getting to know the local people and/or culture* while in Maine.

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.*

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

**Please note extremely small sample size.

Canadian day visitors interested in shopping are most likely to do some general shopping at malls/downtown or shop at the outlets.

Shopping Activities*

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



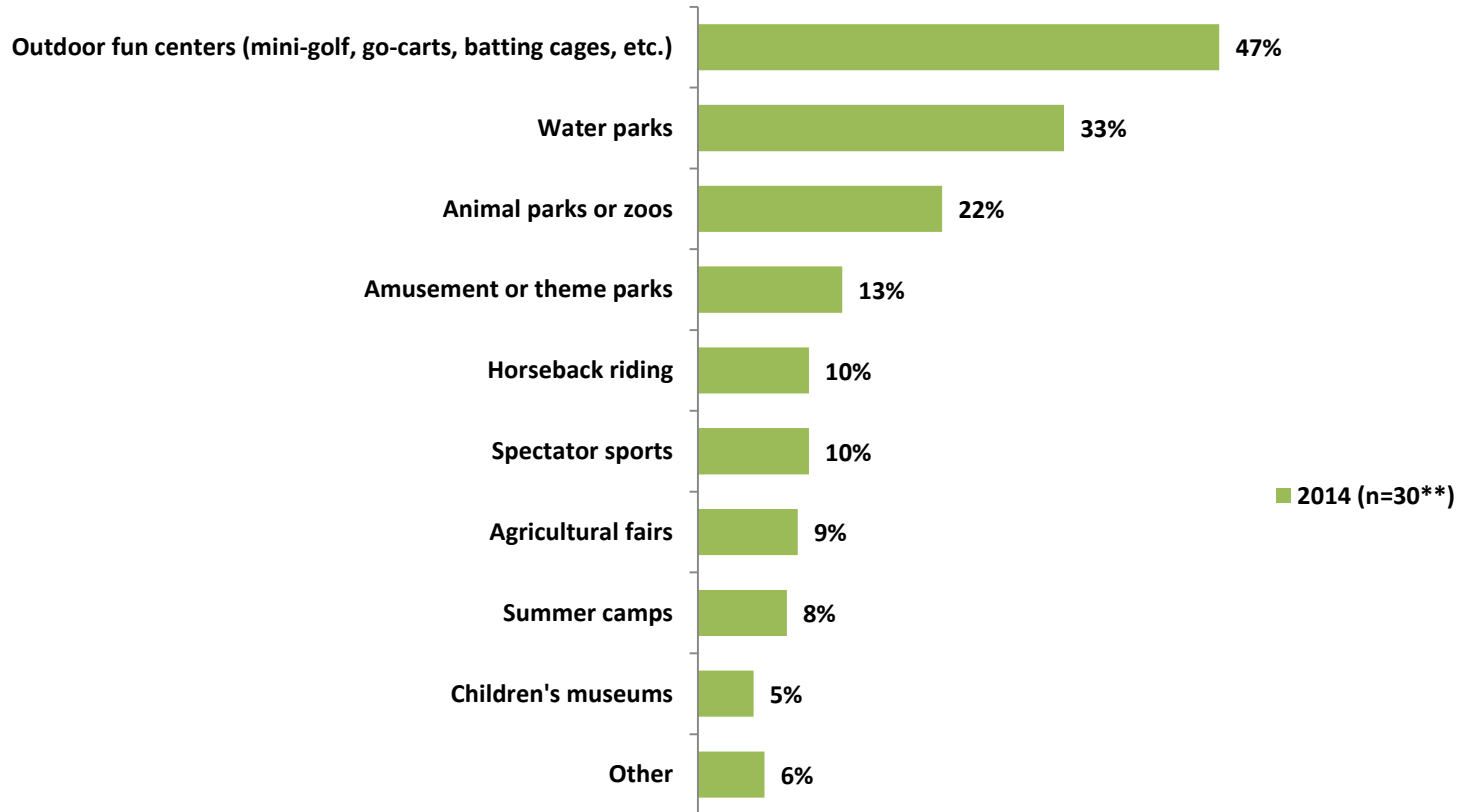
Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

Outdoor fun centers are the most popular family fun/children's activities among Canadian day visitors to Maine.

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.*

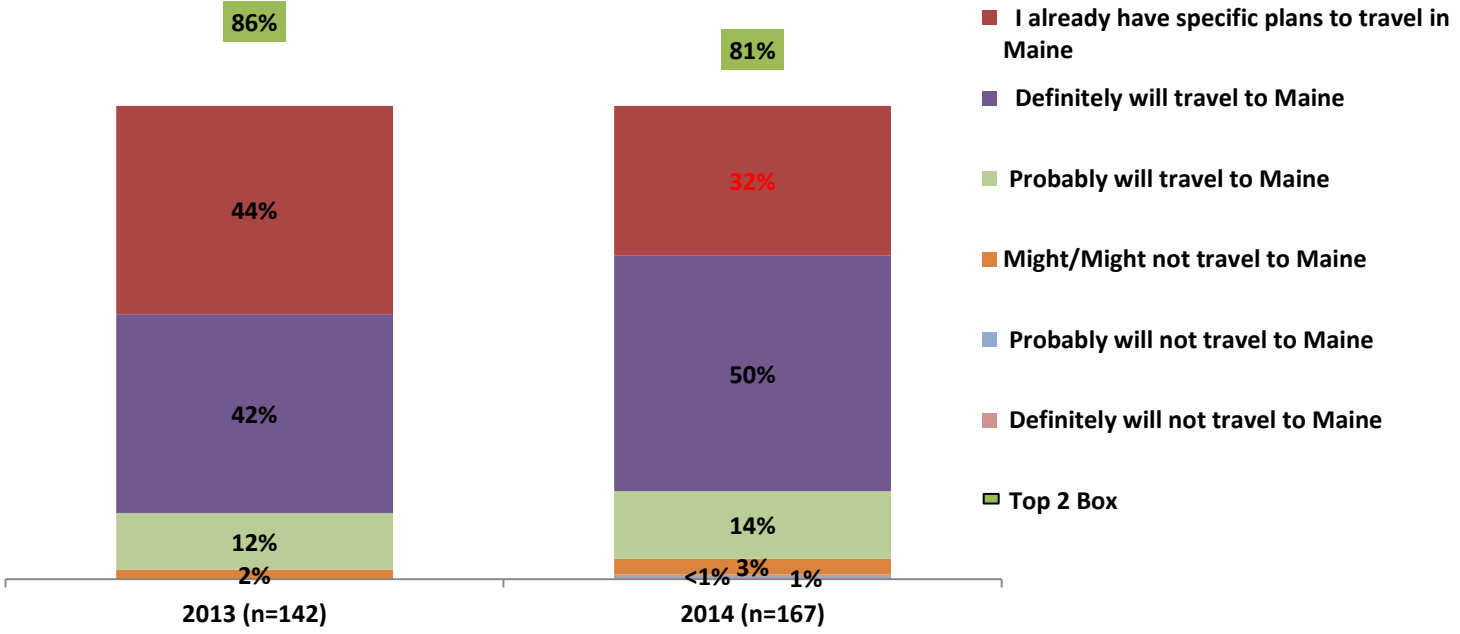
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note extremely small sample size.

Canadian day visitors report a strong intent to travel to Maine again in the future.

- Four-fifths of Canadian visitors indicate they either have plans already to return or definitely will travel to Maine again.

Future Likelihood to Travel to Maine



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.



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