

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

***Regional Insights:
Greater Portland & Casco Bay***

Prepared by



May 2015

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Research Objectives 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
- Survey results were collected during calendar year 2014 for travel to Maine occurring from December 2013 through November 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

Research Objectives and Methodology

- The following report summarizes the results among visitors to the Greater Portland & Casco Bay tourism region during 2014, including.
 - 401 overnight visitors, and
 - 240 day visitors.
- Throughout this report, data for the Greater Portland & Casco Bay tourism region will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by < >.
- Statistically significant differences between 2013 and 2014 are also highlighted for both the Greater Portland & Casco Bay region and the State of 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.



Overnight Visitors: *Traveler Description*



Overnight Visitor Demographics

- Overnight visitors to the Greater Portland/Casco Bay tourism region are about 48 years old, on average, and have annual household incomes that average around \$120,000. Three-fourths have at least a college degree and 70% are married. Nearly two-thirds are employed full-time.
- Overnight visitors to Greater Portland & Casco Bay on average are older, have a higher income, and are more likely to have at least a college degree than visitors to Maine overall.

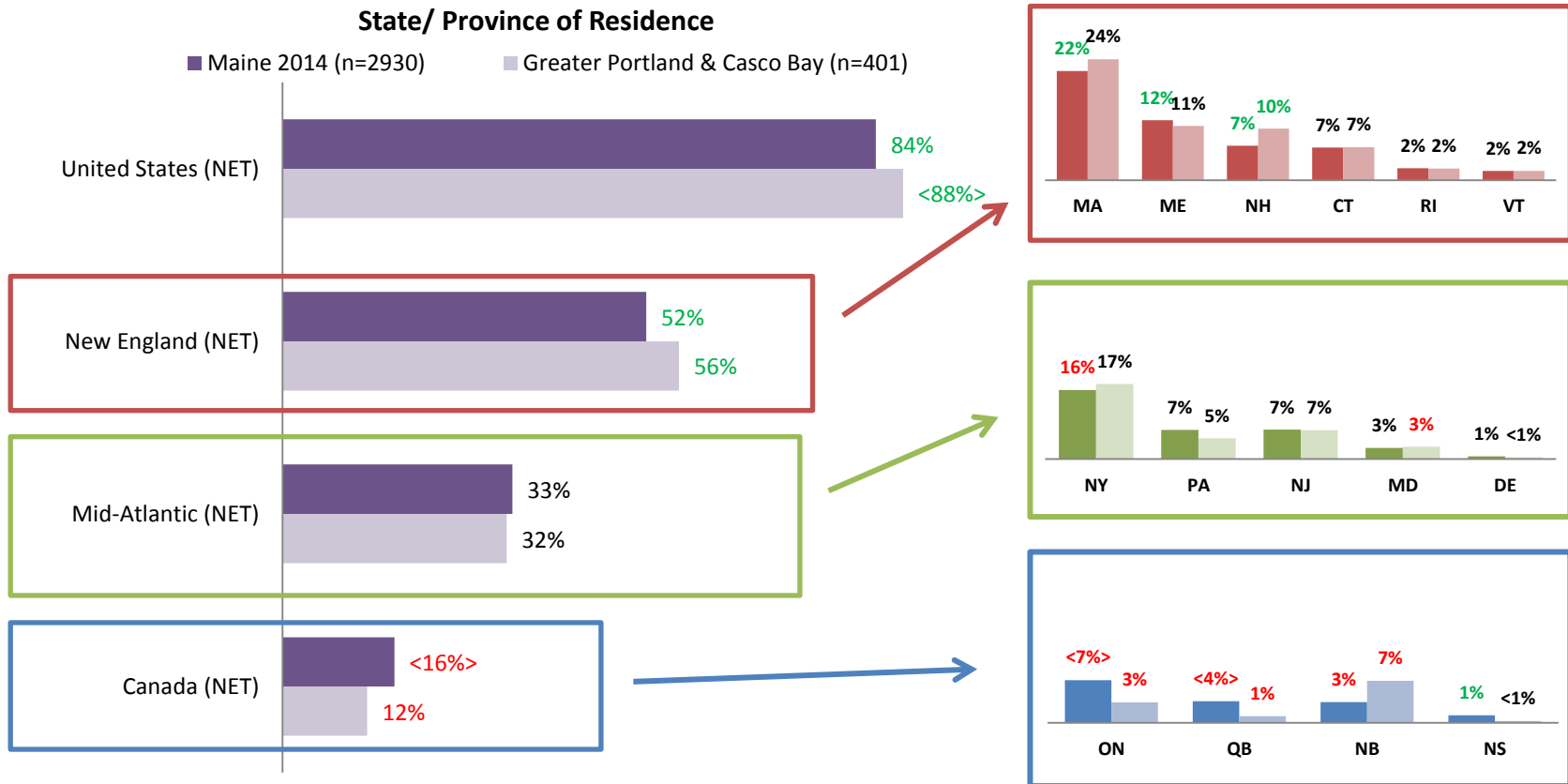
Overnight Visitors	Maine 2014 (n=2930)	Greater Portland & Casco Bay 2014 (n=401)
Age:		
< 35	<29%>	21%
35 - 44	19%	16%
45 - 54	20%	22%
55 +	32%	<40%>
Mean Age (Years)	45.4	<48.5>
Income:		
< \$50,000	<16%>	10%
\$50,000 - \$99,999	<40%>	34%
\$100,000 +	44%	<56%>
Mean Income (Thousands)	\$106,260	<\$120,580>
Female	54%	52%
College Degree or Higher	74%	<78%>
Married	66%	70%
Employed Full Time	62%	62%

<> 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.

Nine in ten overnight visitors to the Greater Portland/Casco Bay region are from the U.S., with most arriving from New England.

- Massachusetts and New York are the top states sending overnight visitors to the Greater Portland/Casco Bay region.
- The proportion of Canadian visitors coming to the Greater Portland/Casco Bay region is lower in 2014 than it had been in 2013, similar to what was seen throughout the State of Maine.



State/ Province of Residence

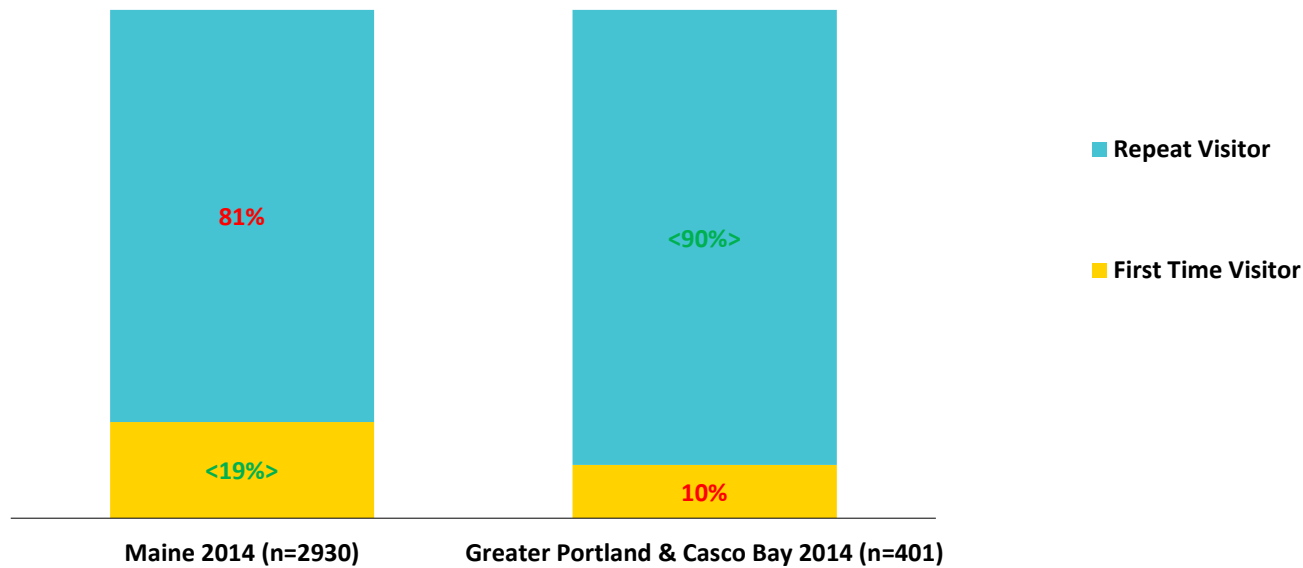
< > indicates a significant difference between subgroups at the 95% confidence level.

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

The vast majority of overnight visitors to the Greater Portland/Casco Bay region are repeat visitors.

- Overall, the Greater Portland/Casco Bay region attracted a lesser proportion of first-time visitors than did the State of Maine as a whole (10% versus 19%), as well as a lesser proportion than it had last year (16%).

Repeat vs. First Time Visitors



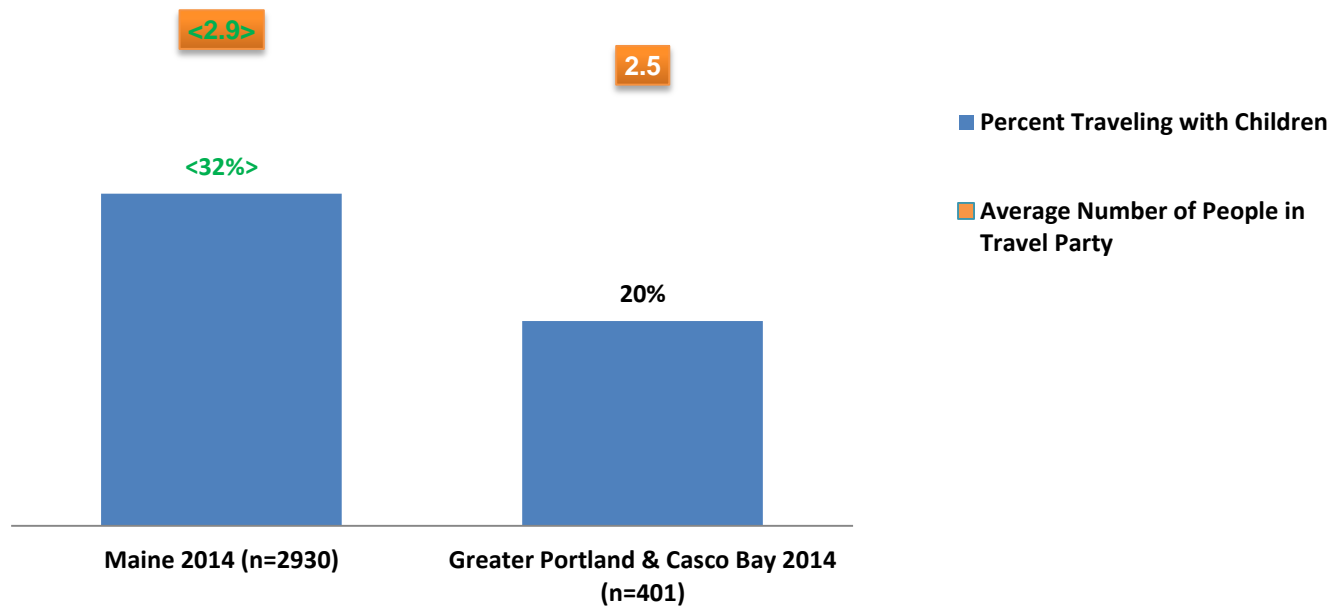
Q11. Was this your first visit in Maine?

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

Visitors to the region traveled in parties of two or three people on average.

- Travel parties to the Greater Portland/Casco Bay region are smaller and less likely to be traveling with children, when compared to travel parties to the State as a whole.

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?

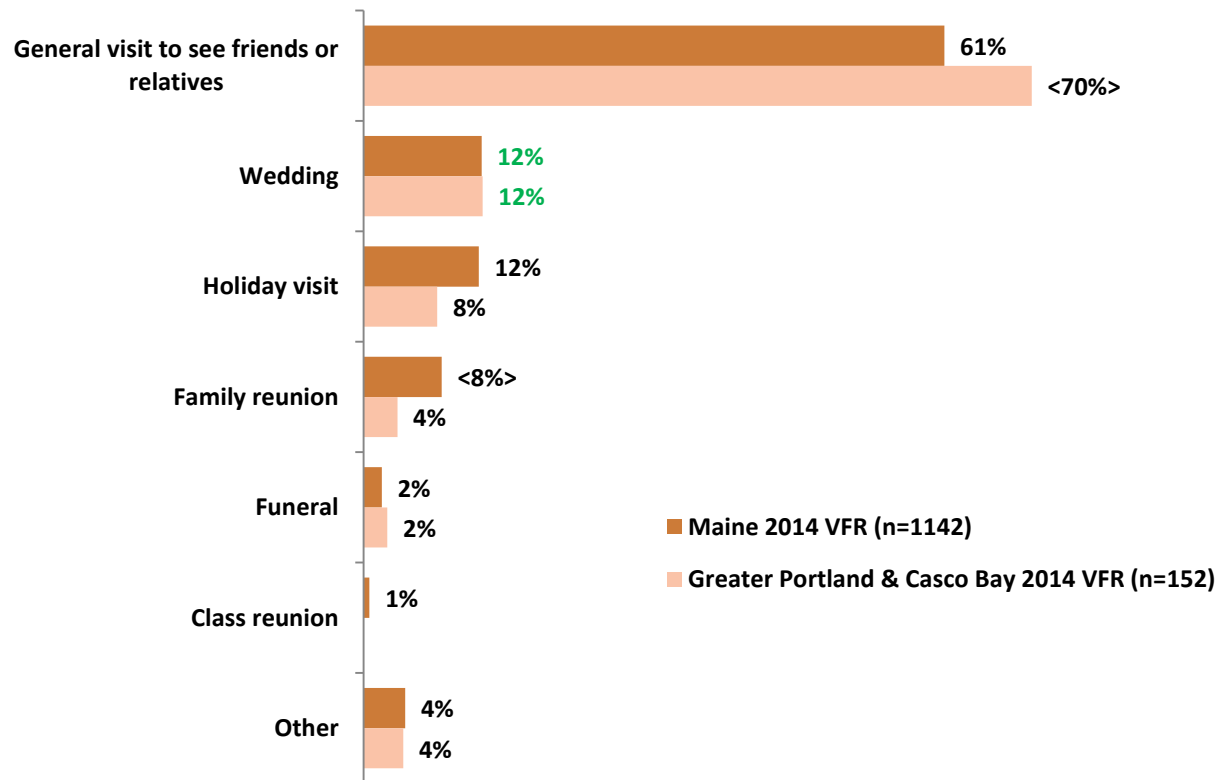
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



The most common purpose of an overnight VFR trip to the Greater Portland/Casco Bay region is a *general visit to see friends or relatives*.

Primary Purpose of Overnight VFR Trips



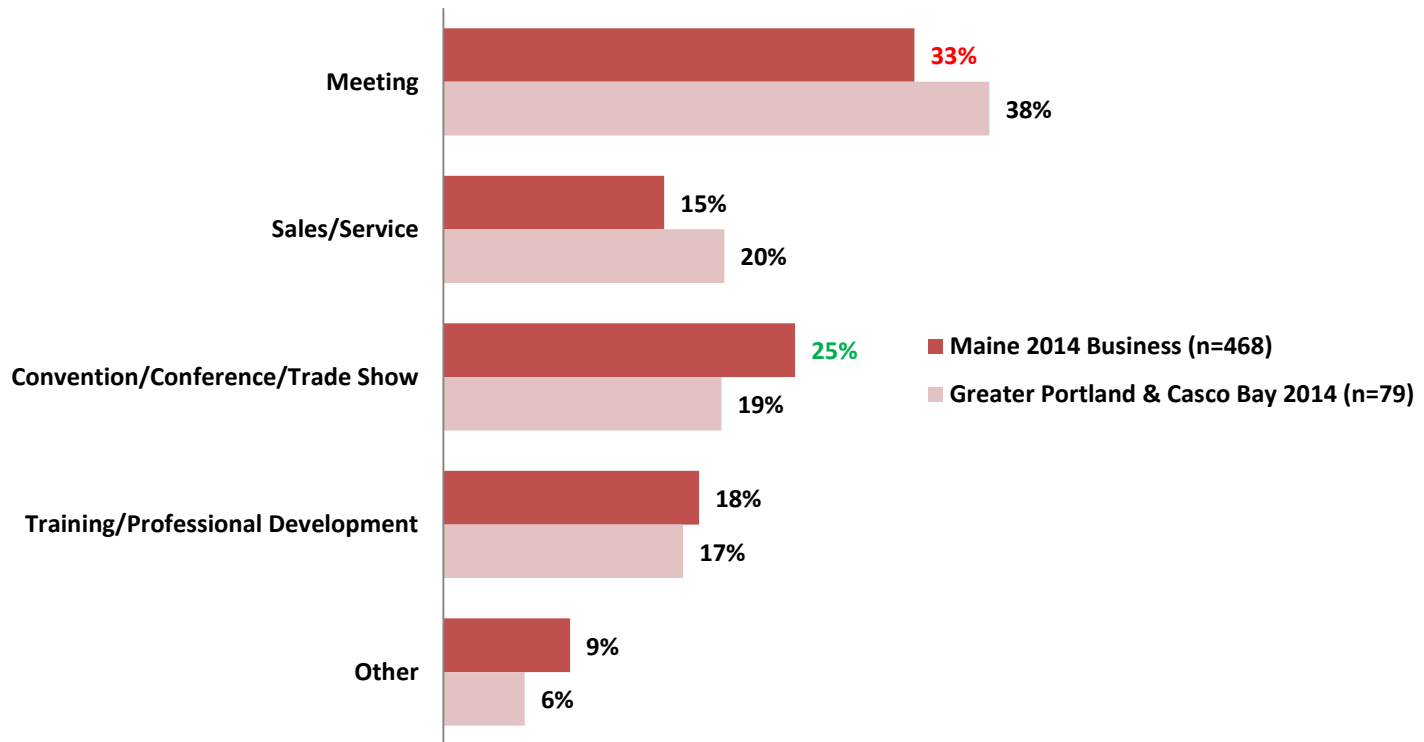
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

< > 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.

Overnight business travelers in the Greater Portland/Casco Bay region are most likely to cite a *meeting* as the primary purpose of their trip.

Primary Purpose of Overnight Business Trips



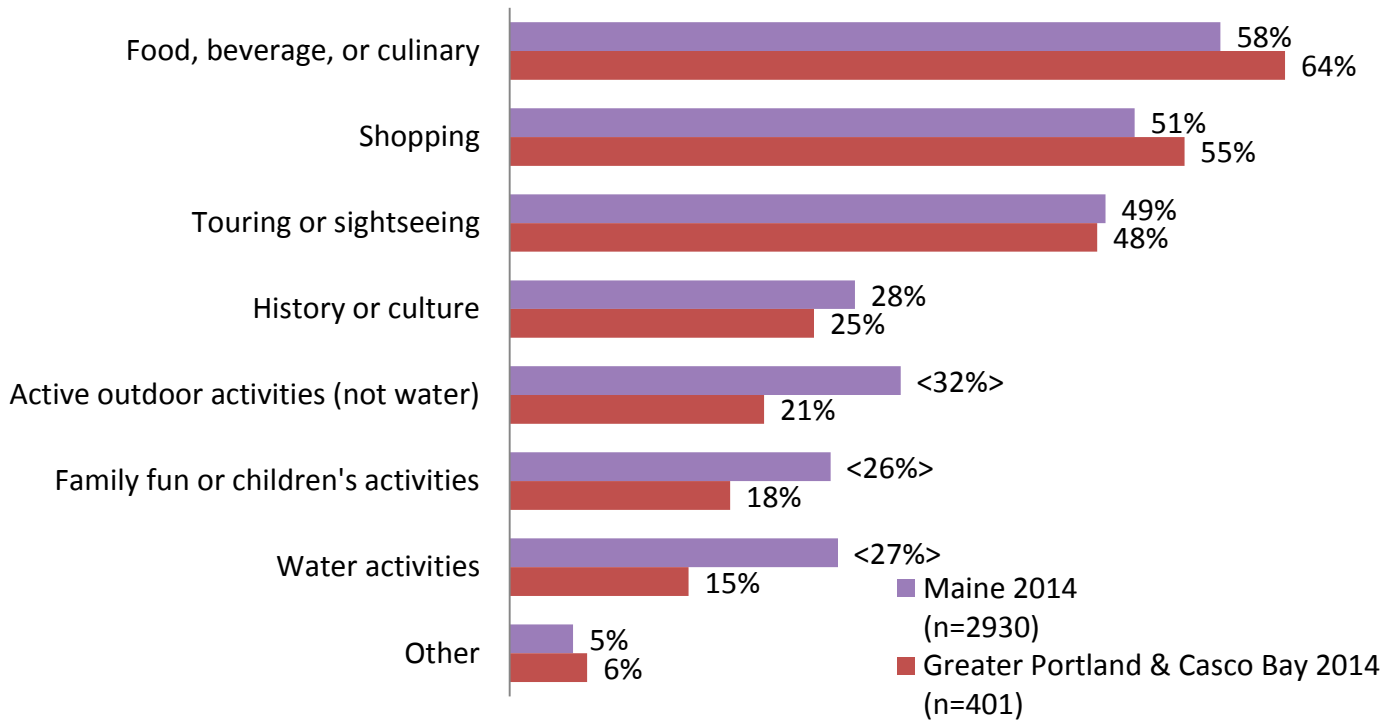
Q8. What was the primary purpose of your most recent business trip in Maine?

< > 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.

Similar to Maine visitors in general, food/beverage/culinary is the most common interest area pursued by overnight visitors to the Greater Portland/Casco Bay region.

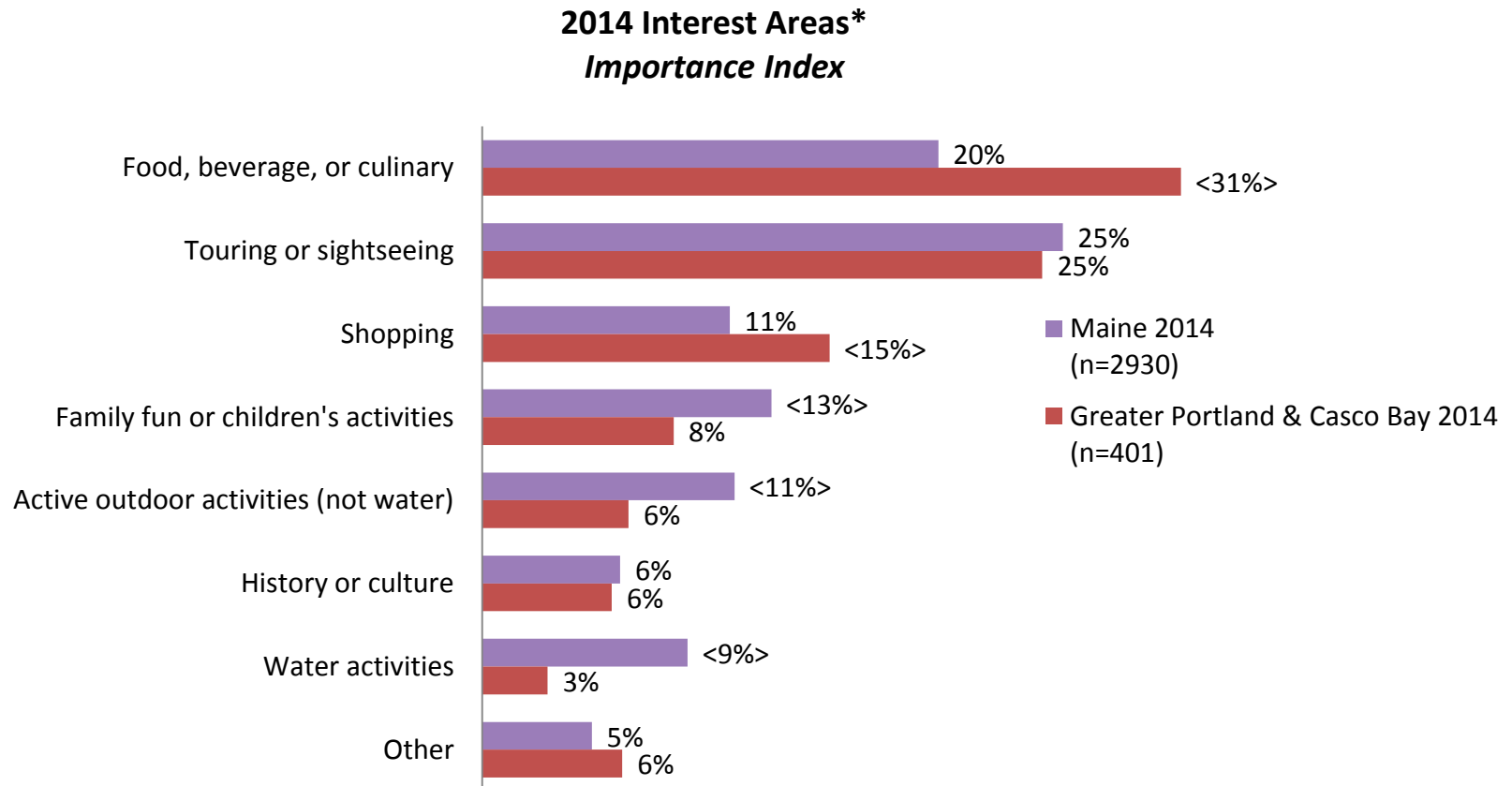
2014 Interest Areas*



Most Important Interest Area Greater Portland & Casco Bay	
Food, beverage, or culinary	48%
Shopping	27%
Touring or sightseeing	51%
History or culture	23%
Active outdoor activities (not water)	31%
Family fun or children's activities	46%
Water activities	20%
Other	97%

Food/beverage/culinary and touring/sightseeing activities rank highest when analyzing both interest and importance.

- When looking at both interest areas and the relative importance of those interests, overnight visitors to the Greater Portland/Casco Bay region are more likely than visitors to the State as a whole to select *food/beverage/culinary* and *shopping* interests.



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. 15

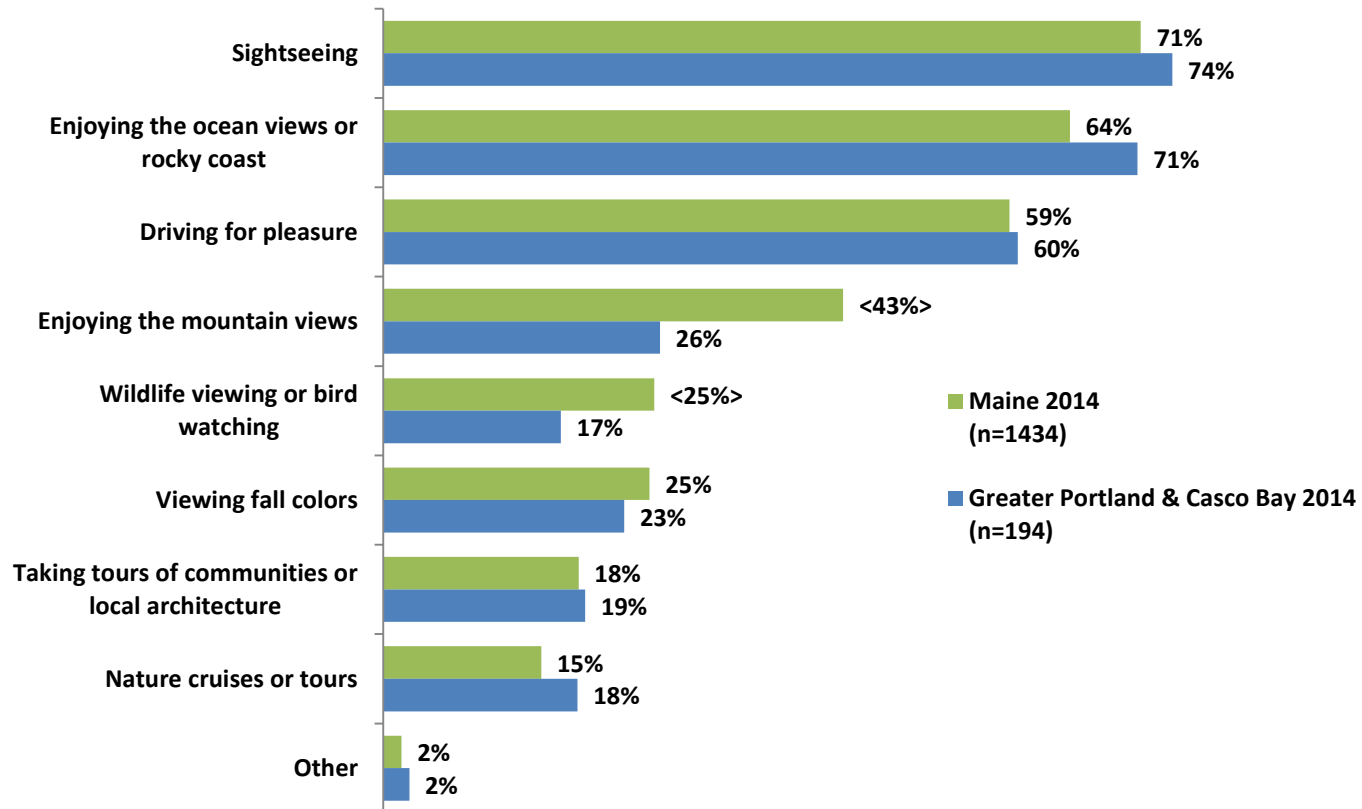
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Sightseeing and enjoying the ocean views or rocky coast are the most common touring/sightseeing activities pursued.

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.

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

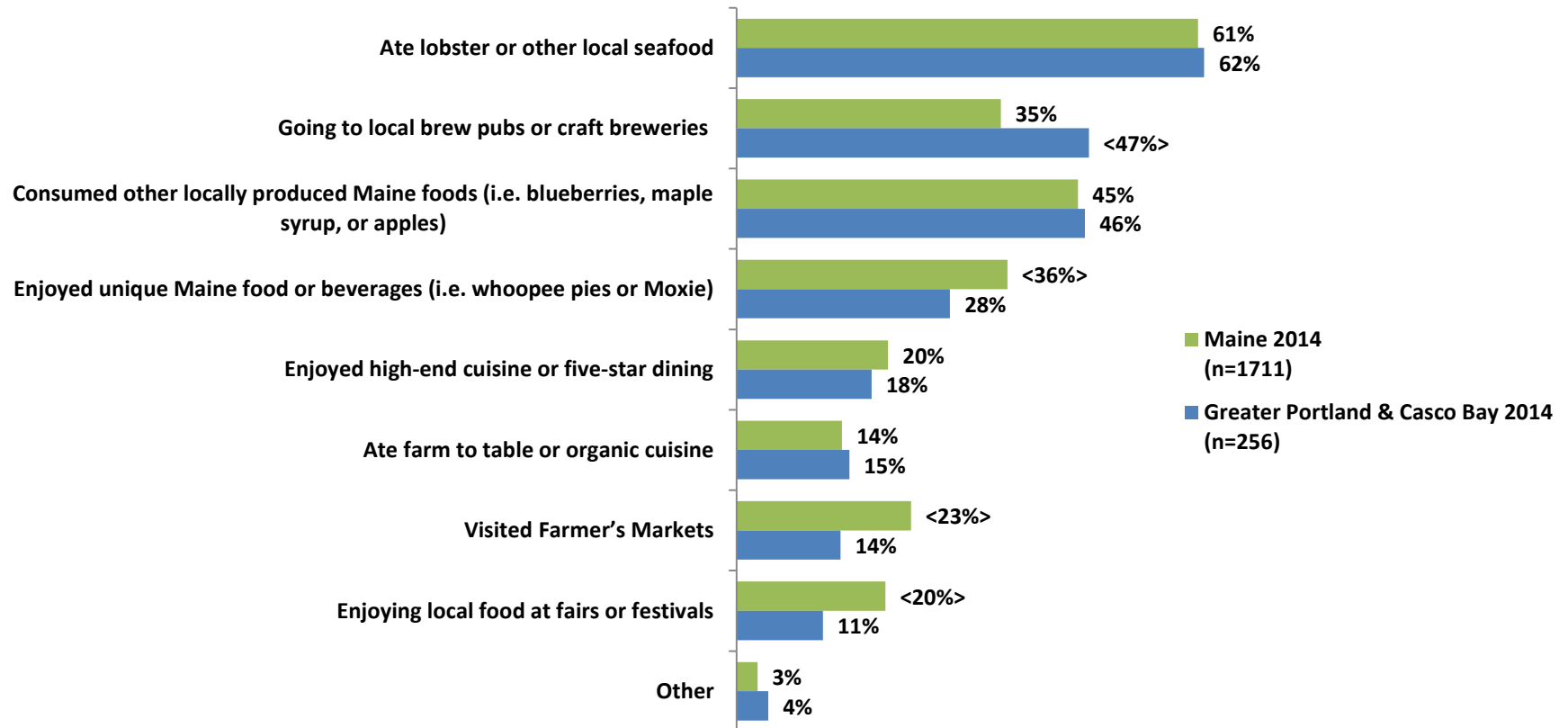
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Eating lobster and local seafood is the most commonly enjoyed food/beverage/culinary activity in the region and the State as a whole.

- Nearly half of all Greater Portland/Casco Bay visitors participating in food/beverage/culinary activities do so through going to local brew pubs or craft breweries compared to just one in three visitors to Maine overall.

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.

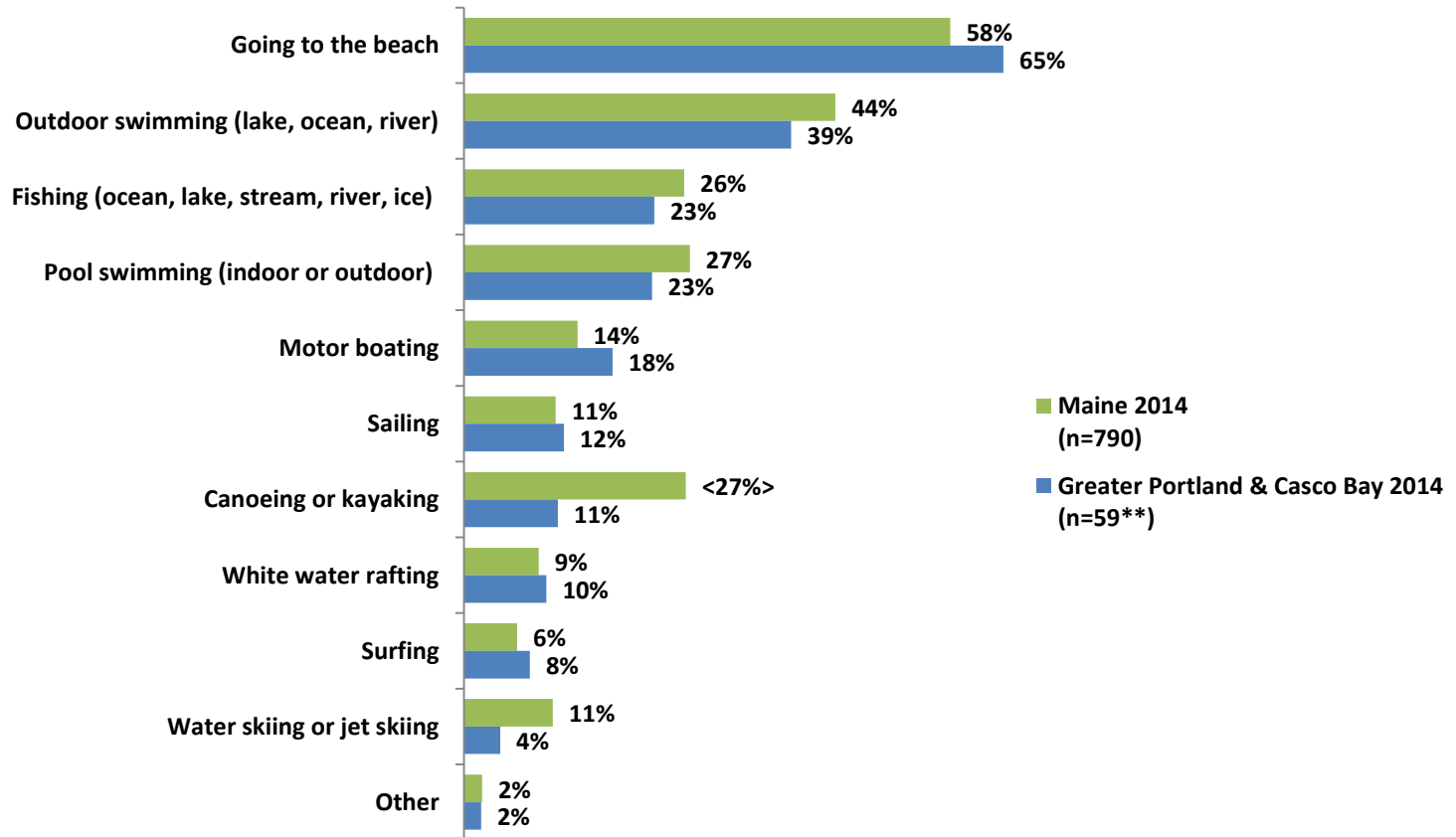
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Two in three overnight visitors to the region who participate in water activities spent time at the *beach*.

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.*

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

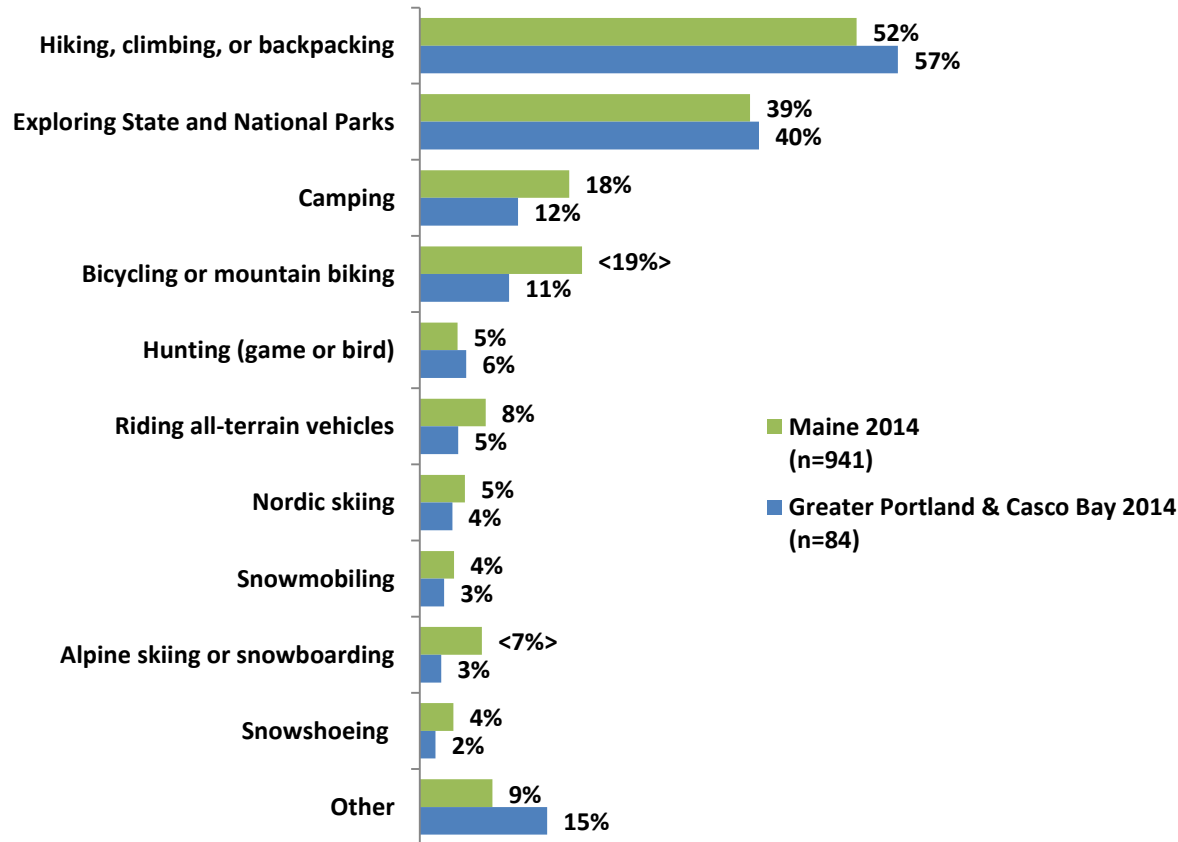
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Hiking/climbing/backpacking is the most common active outdoor activity undertaken by overnight 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.

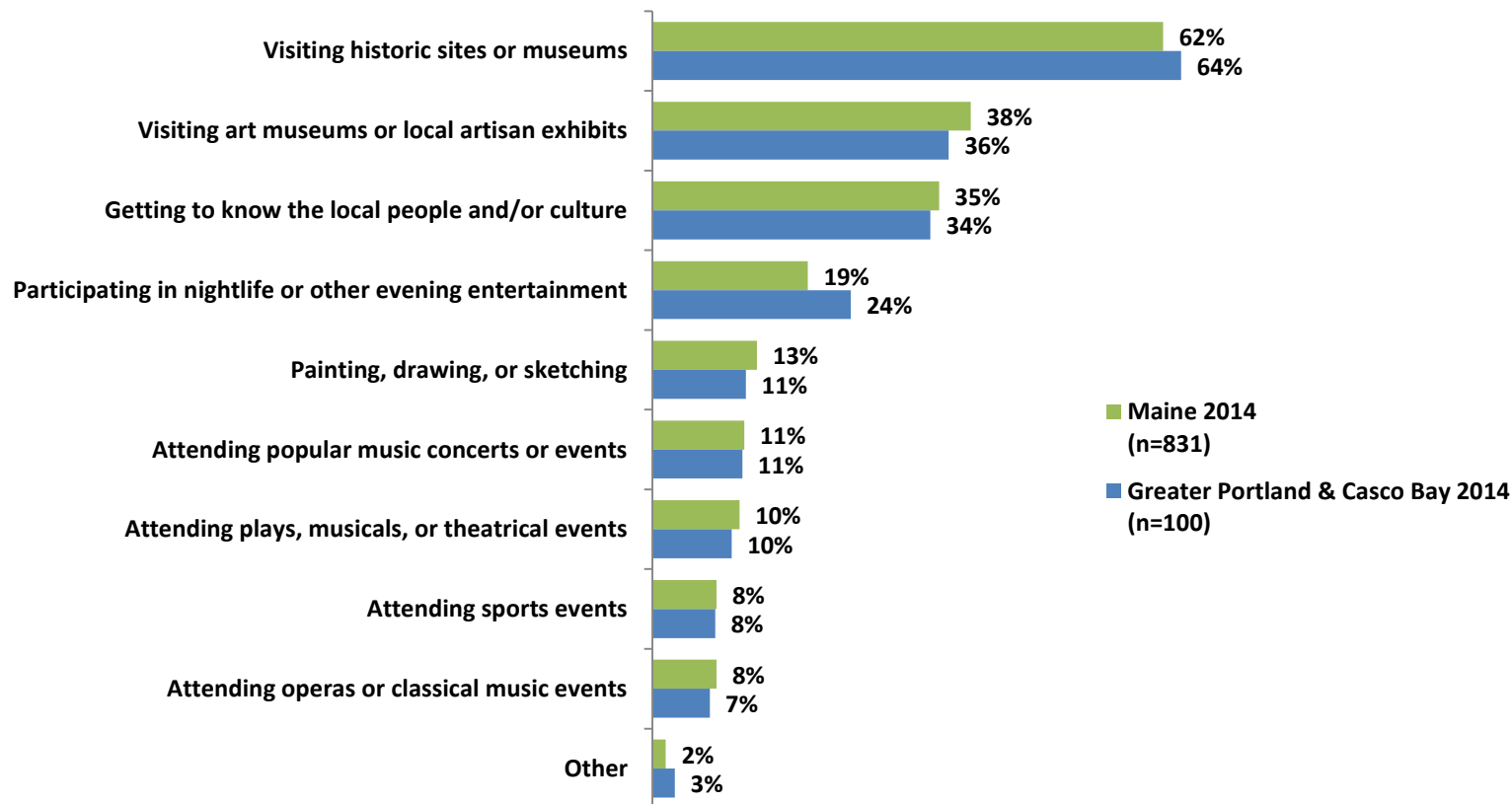
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Two in three visitors interested in history or culture visit historic sites or museums in the region.

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.*

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

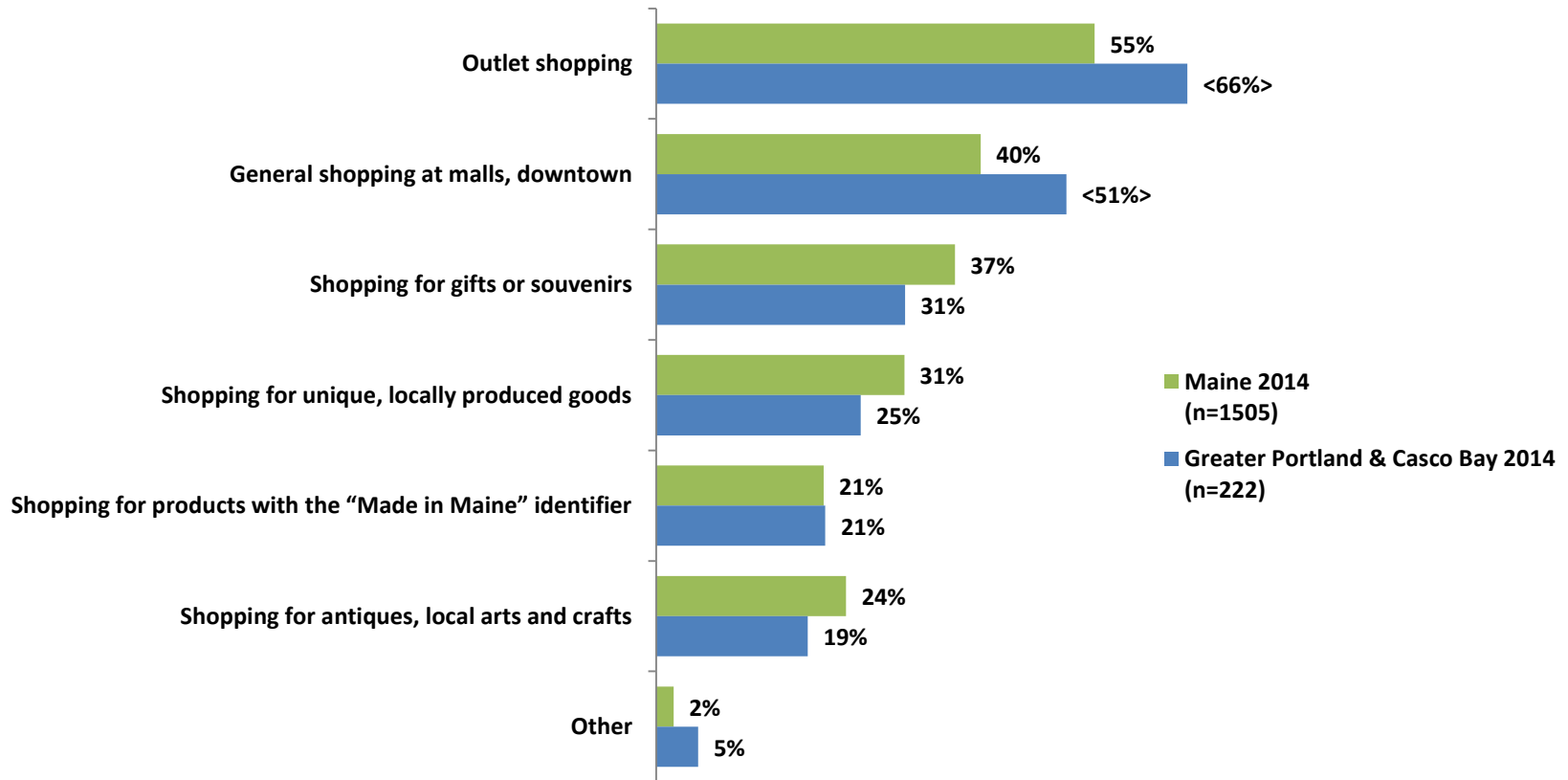
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Two in three overnight visitors who shop do so at *outlets*, followed by half who shop at *malls or downtown areas*.

- Both of these shopping activities are more prevalent among overnight visitors to the Greater Portland/Casco Bay region than they are among visitors to other regions in Maine.

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.

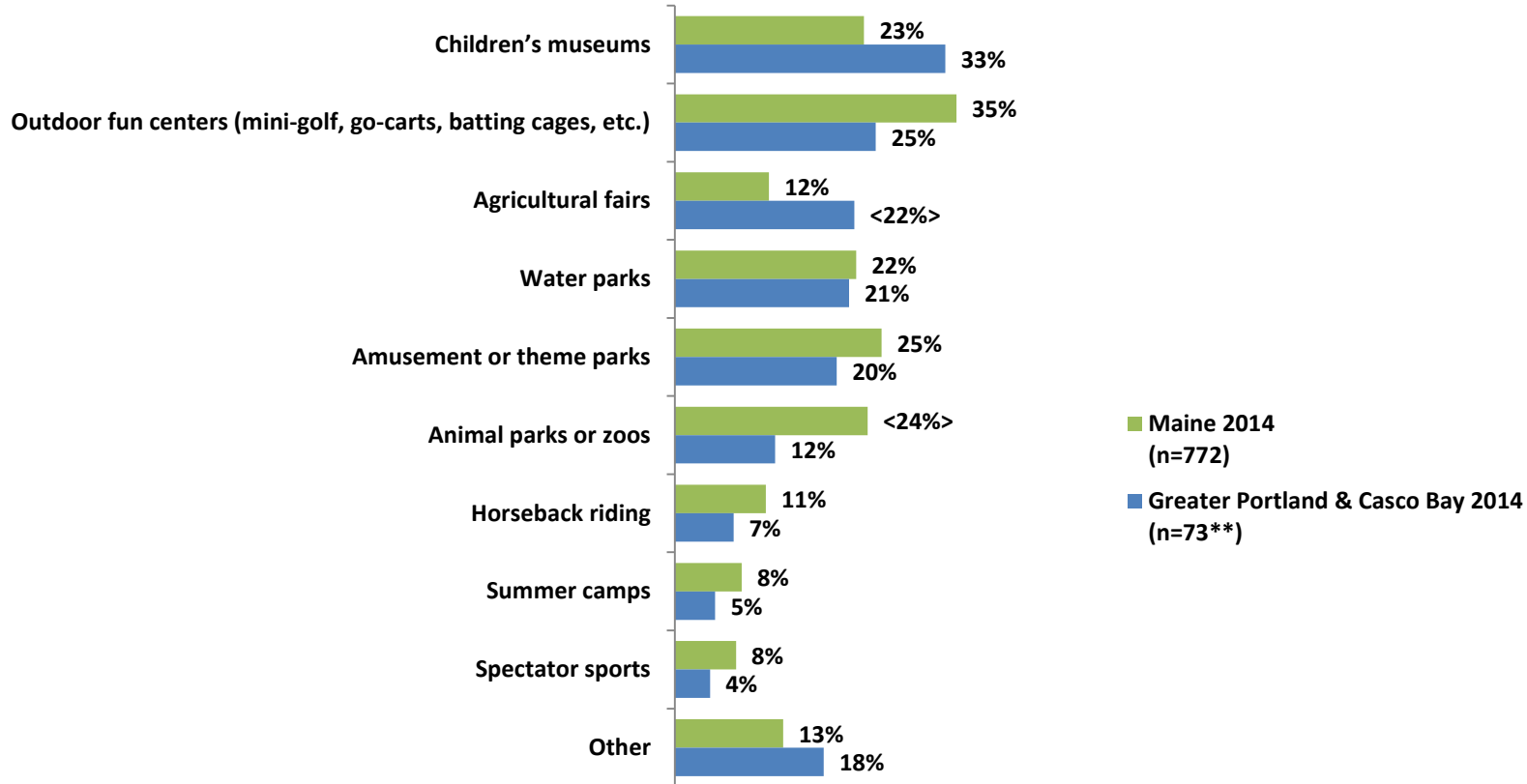
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Children's museums are the most common family fun/children's activity among overnight visitors to the Greater Portland/Casco Bay region.

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.

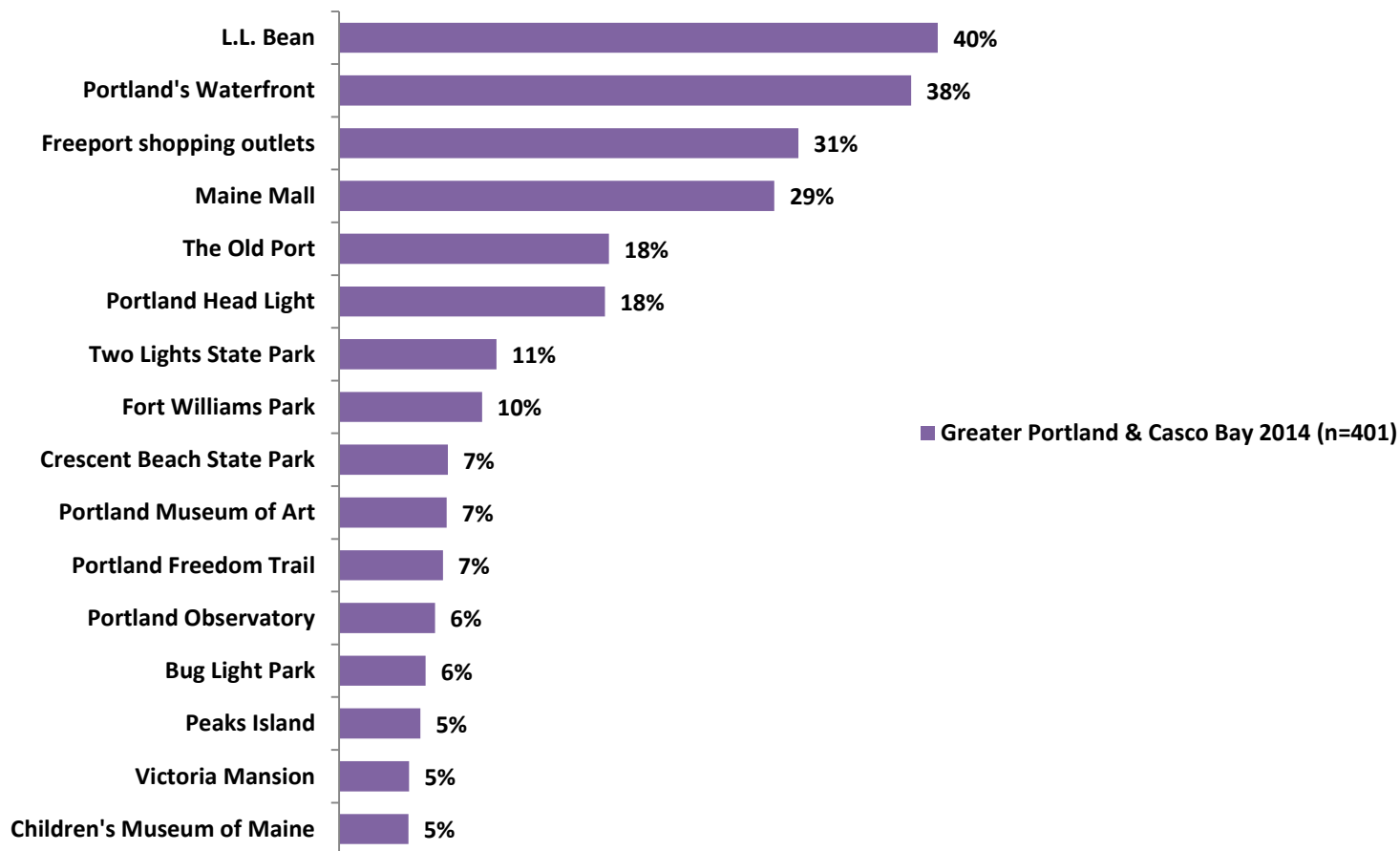
< > indicates a significant difference between subgroups at the 95% confidence level.

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

**Please note small sample size.

L.L. Bean and Portland's Waterfront are the most commonly visited attractions in the Greater Portland/Casco Bay region.

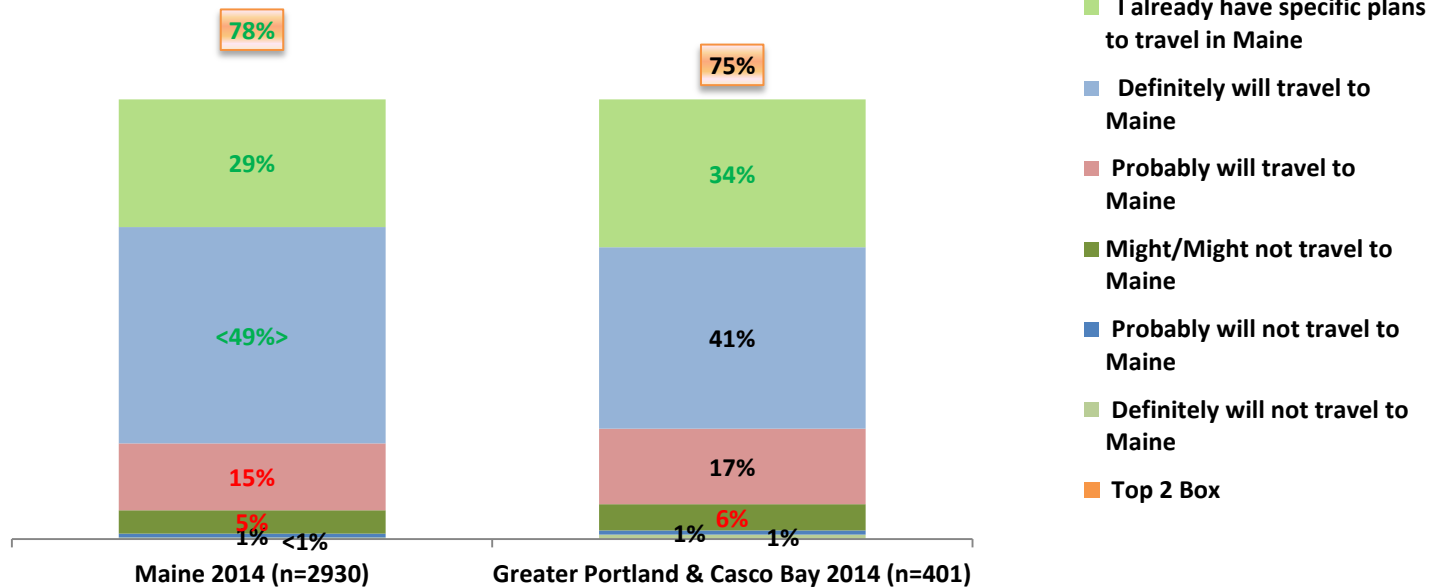
Top Attractions/Locations Visited



Q26: Within the region you visited, what specific attractions or locations did you visit? (Please check all that apply)

Three-fourths of overnight visitors to the Greater Portland/Casco Bay region intend to return within the next two years.

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?

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

Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Greater Portland/Casco Bay region average around 50 years old, earning just over \$100,000 annually. Four in five have a college degree, and 61% are employed full-time. Two-thirds are married.
- Similar to overnight visitors, day visitors to the Greater Portland/Casco Bay tourism region have higher incomes on average and are more likely than Maine visitors overall to have a college degree or higher.

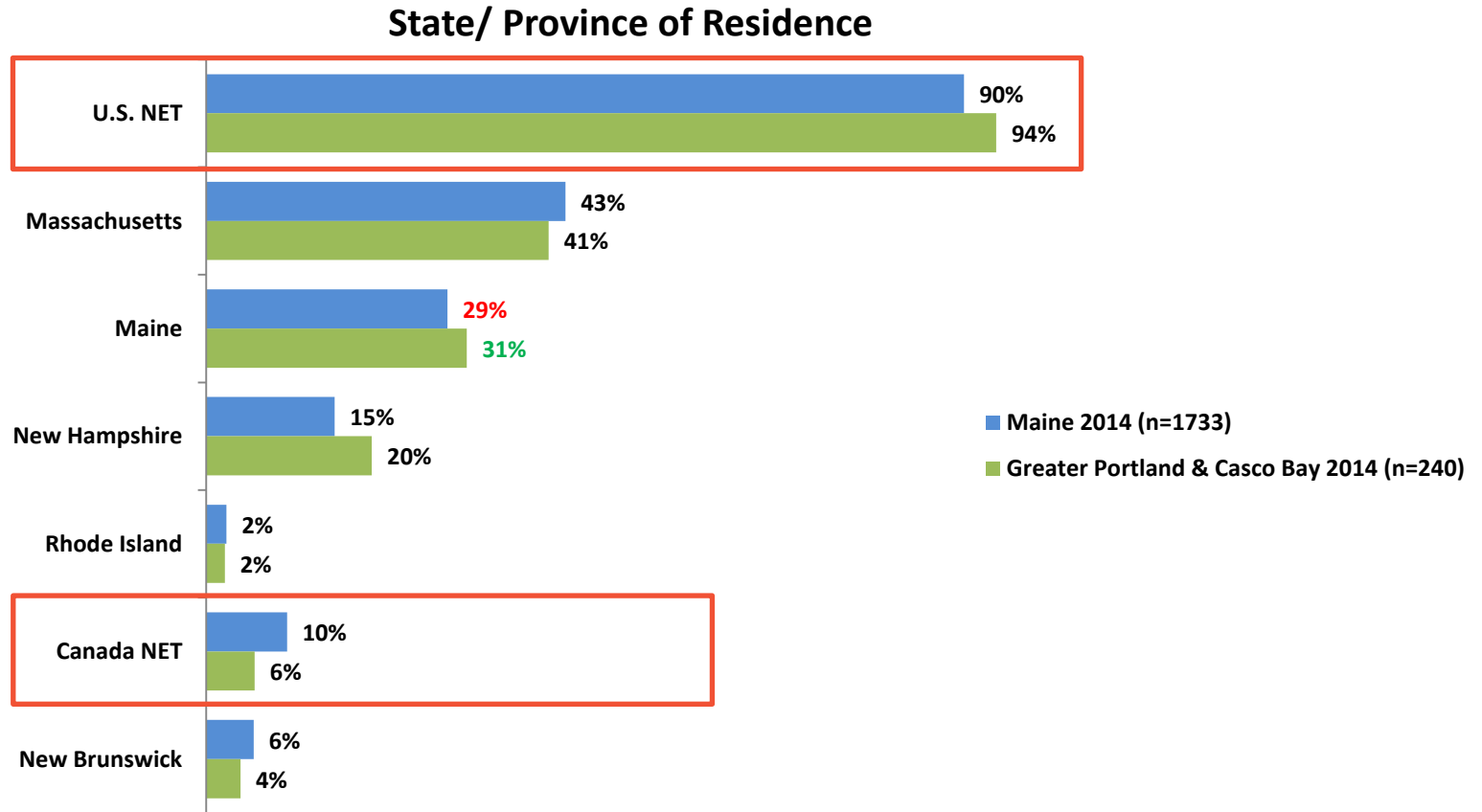
Day Visitors	Maine 2014 (n=1733)	Greater Portland & Casco Bay 2014 (n=240)
Age:		
< 35	24%	19%
35 - 44	16%	15%
45 - 54	22%	23%
55 +	38%	43%
Mean Age (Years)	47.9	49.8
Income:		
< \$50,000	22%	19%
\$50,000 - \$99,999	43%	39%
\$100,000 +	36%	43%
Mean Income (Thousands)	\$93,610	<\$101,480>
Female	56%	58%
College Degree or Higher	69%	<80%>
Married	64%	68%
Employed Full Time	54%	61%

<> 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.

Similar to day visitors to Maine overall, nine in ten day visitors to the Greater Portland/Casco Bay region originate in the U.S.

- Massachusetts supplies the greatest proportion of day visitors to the Greater Portland/Casco Bay region.

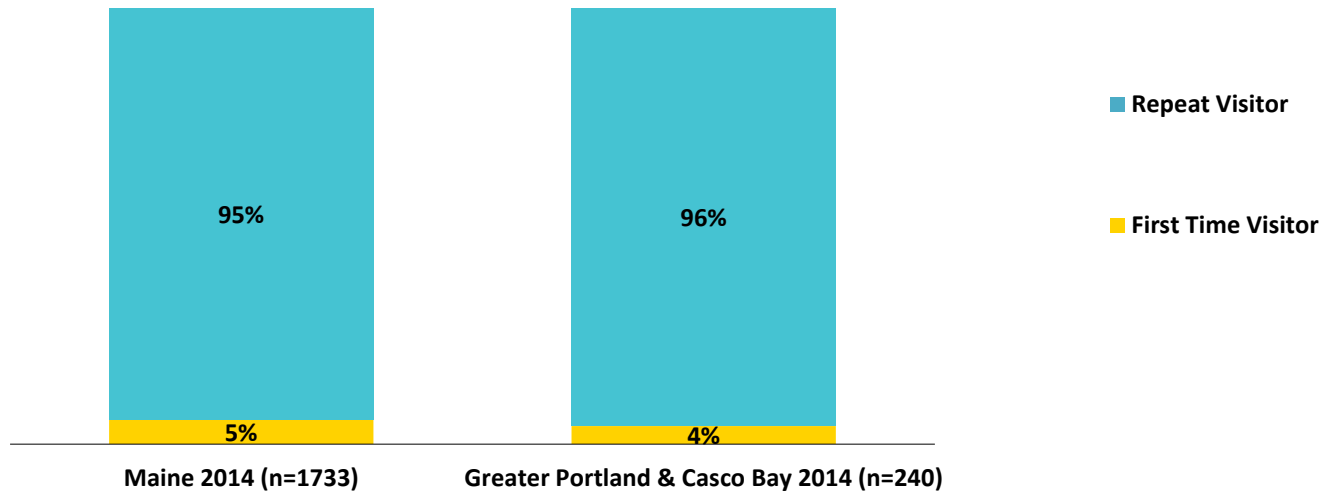


Q2. In what State or Province do you reside?

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

Nearly all day visitors to the Greater Portland/Casco Bay region have visited Maine previously.

Repeat vs. First Time Visitors



Q10. Was this your first trip to Maine?

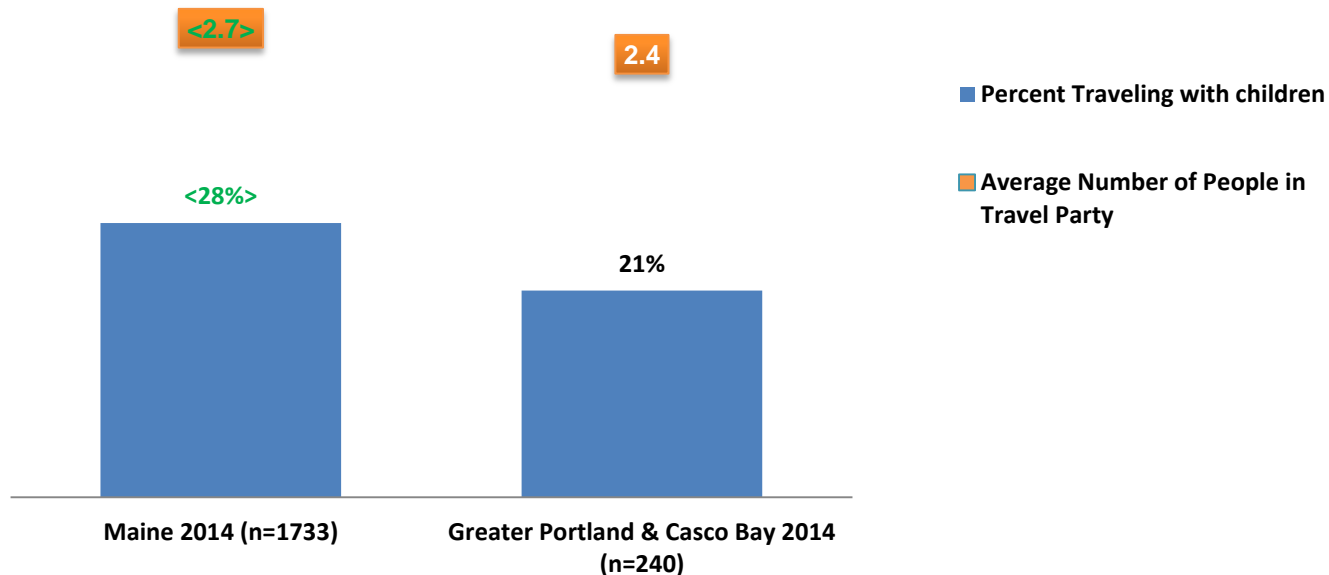
Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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

Day visitors to the Greater Portland/Casco Bay region travel in groups of two to three, with one in five traveling with children.

- Similar to overnight visitors to this region, day visitors to the Greater Portland/Casco Bay region travel in smaller groups than day visitors to Maine as a whole. They are also less likely to be traveling with kids.

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

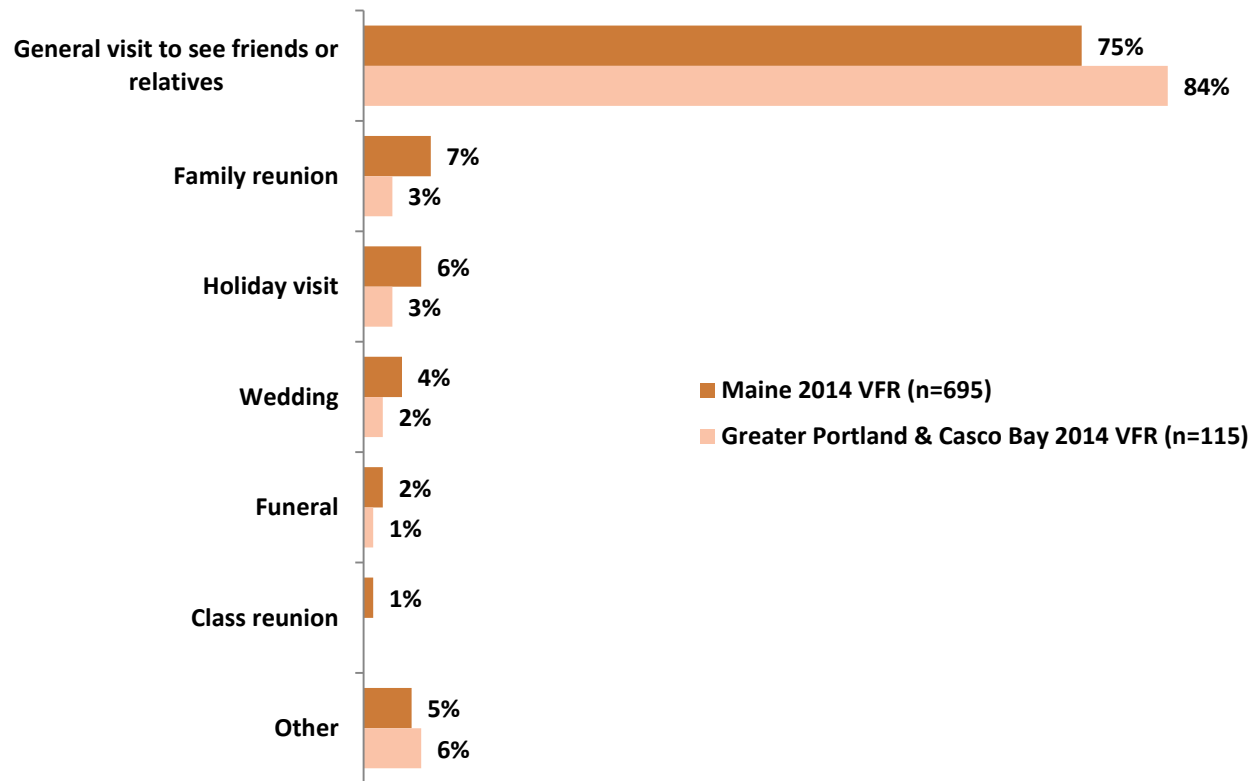
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Four in five VFR day visitors cite a *general visit to see friends or relatives* as the primary purpose of their trip.

Primary Purpose of Day VFR Trips



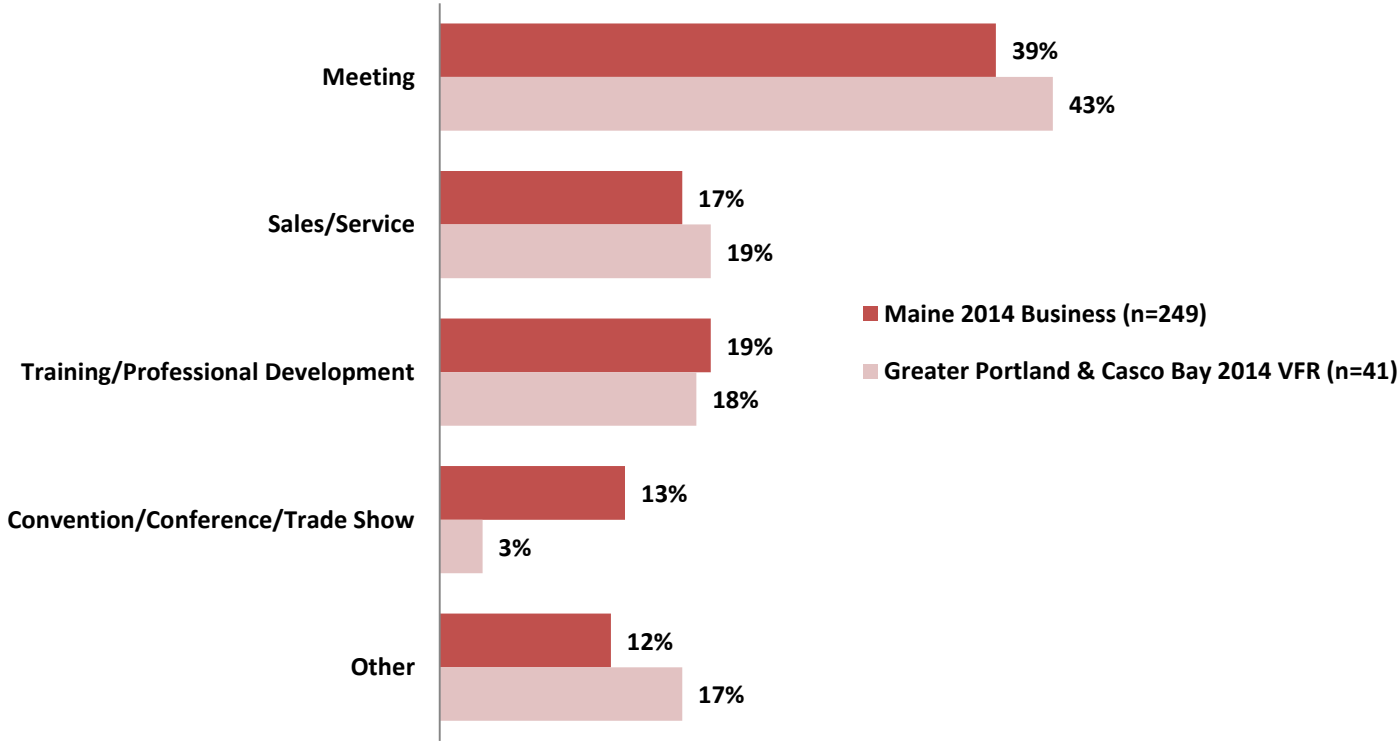
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

< > 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.

Among business travelers, *meetings* are the most common purpose of a day trip to the Greater Portland/Casco Bay region.

Primary Purpose of Day Business Trips

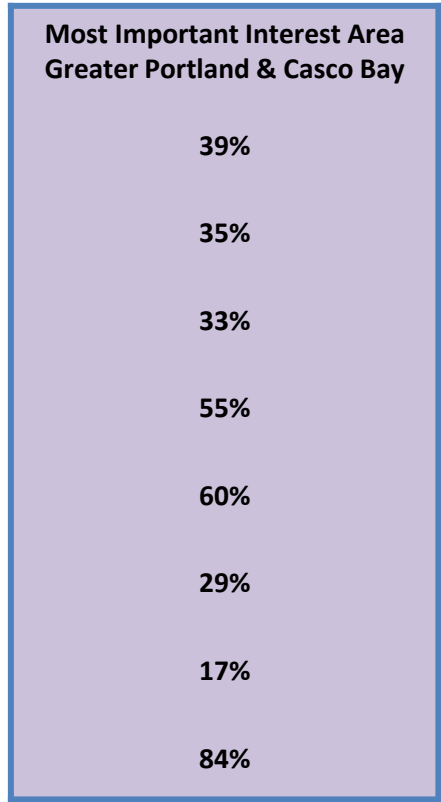
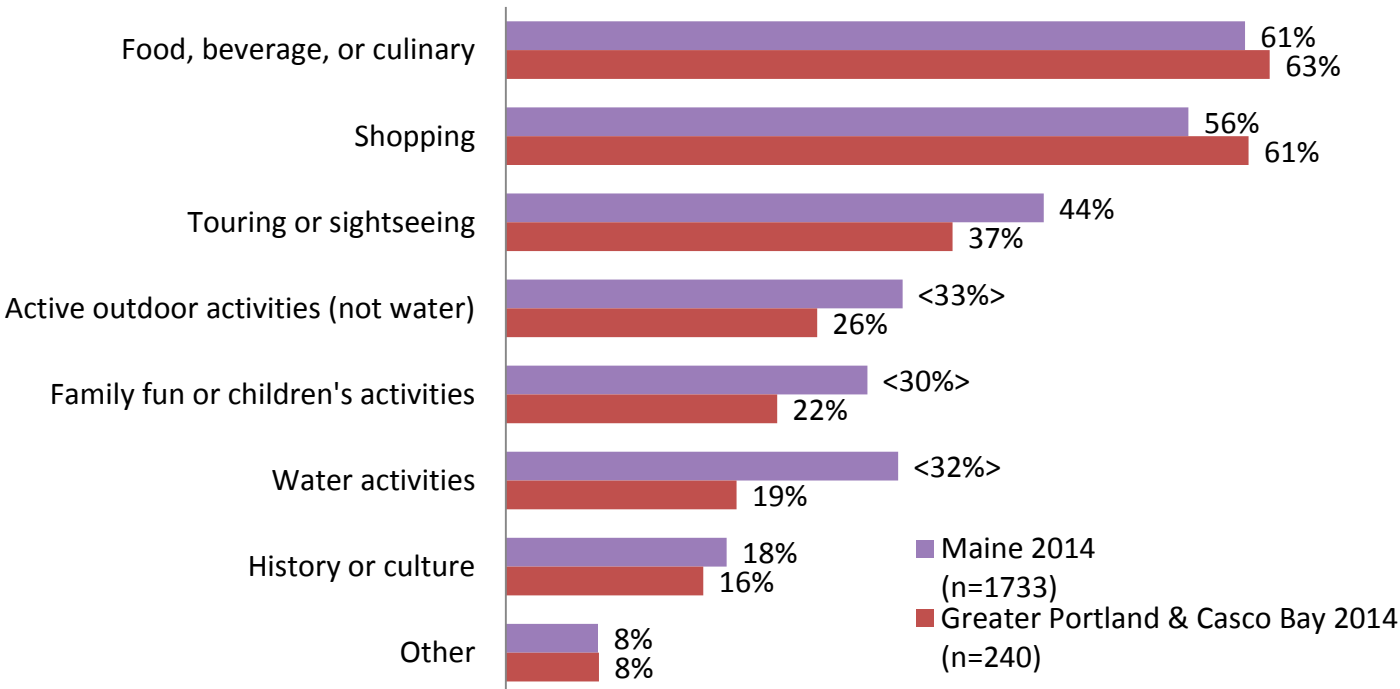


Q8. What was the primary purpose of your most recent business trip in Maine?
 < > indicates a significant difference between subgroups at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Food/beverage/culinary interests and shopping are the most commonly pursued interests among day visitors to this region.

- Day visitors to the Greater Portland/Casco Bay region are less likely to partake in active outdoor activities, water activities, or family fun/children’s activities than day visitors to Maine overall.

2014 Interest Areas*



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

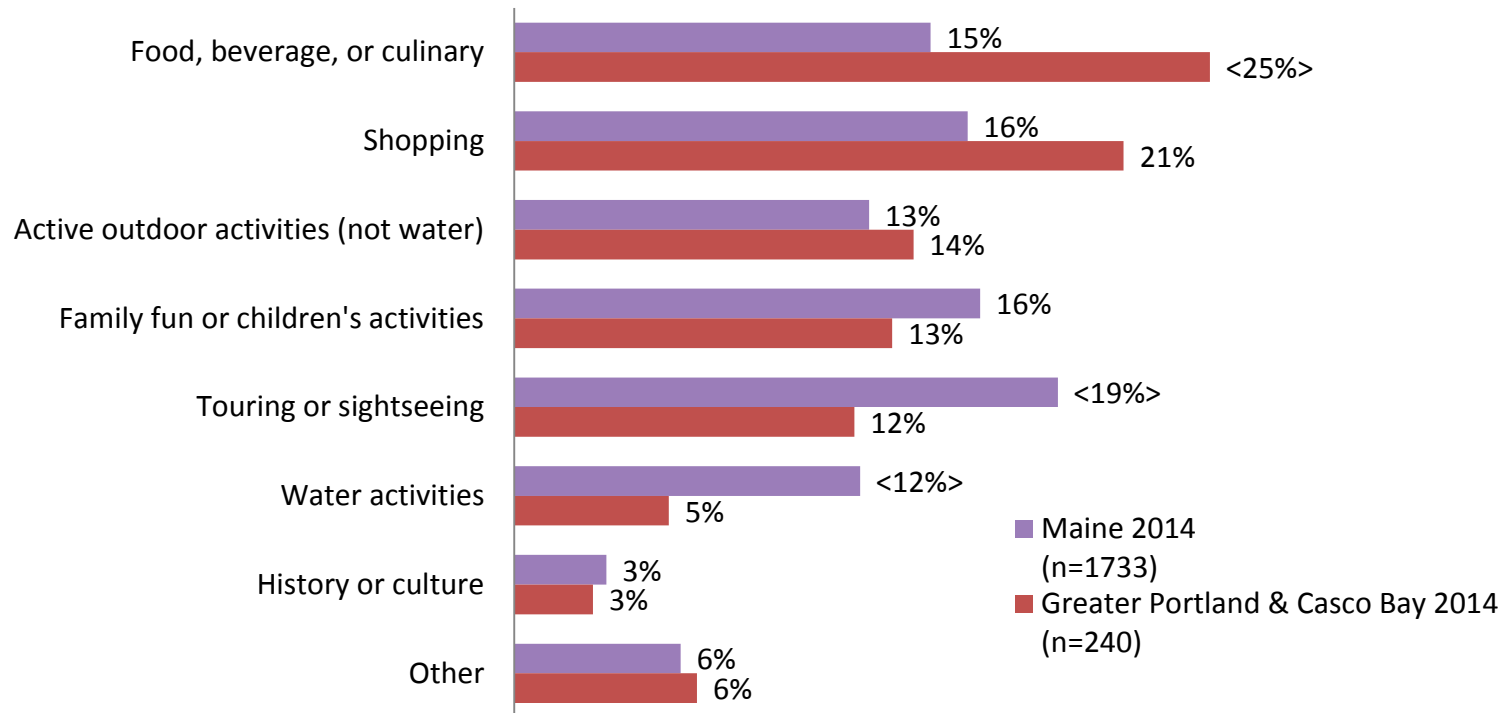
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

< > 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, food/beverage/culinary and shopping activities rank highest.

2014 Interest Areas*
Importance Index



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. 34

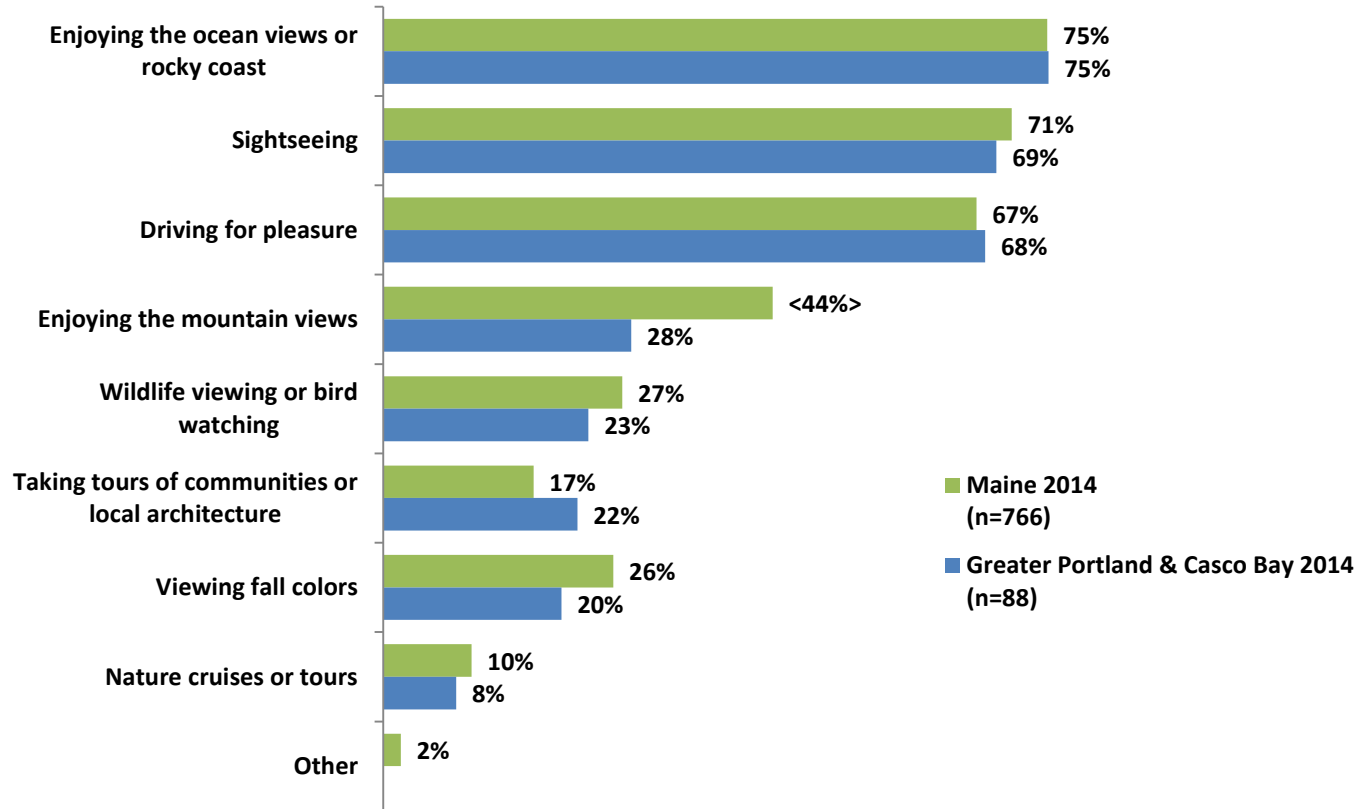
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Common touring or sightseeing activities include *enjoying the ocean views or rocky coast, sightseeing, and driving for pleasure.*

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.*

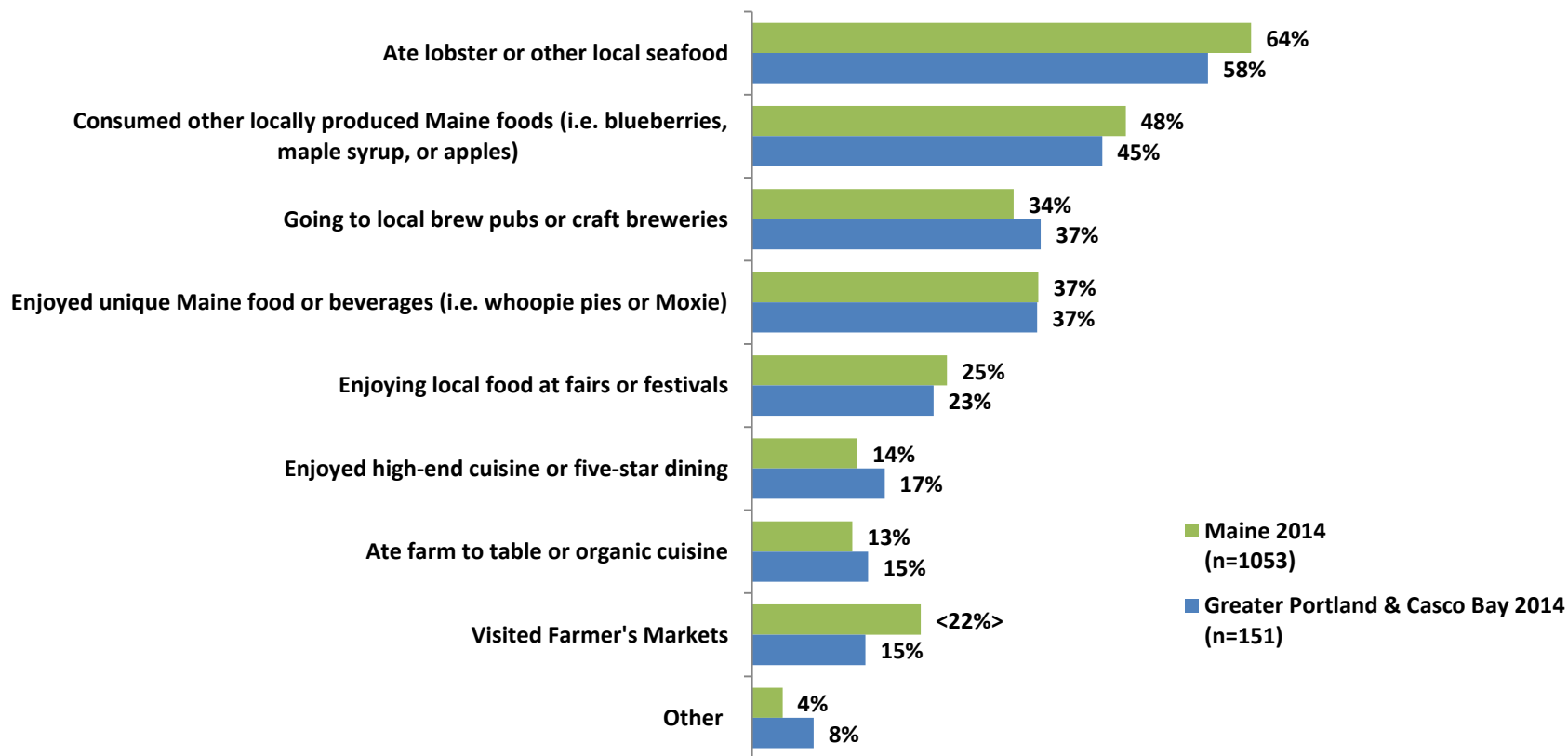
< > indicates a significant difference between subgroups at the 95% confidence level.

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

A majority of those who pursued food/beverage/culinary activities did so by *eating lobster or other local seafood*.

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.*

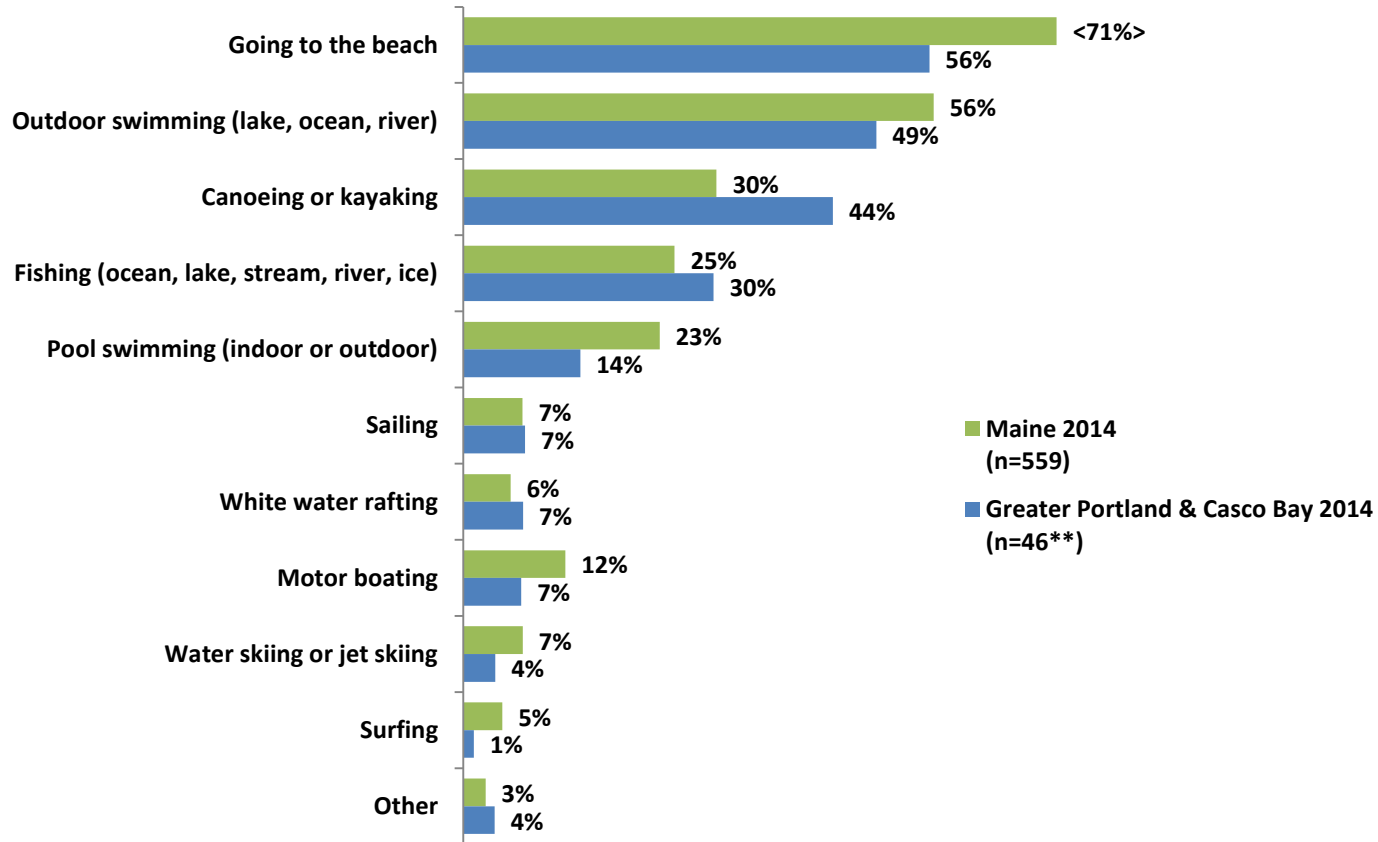
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Going to the beach is the most common water activity participated in by day visitors, followed by outdoor swimming.

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.

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

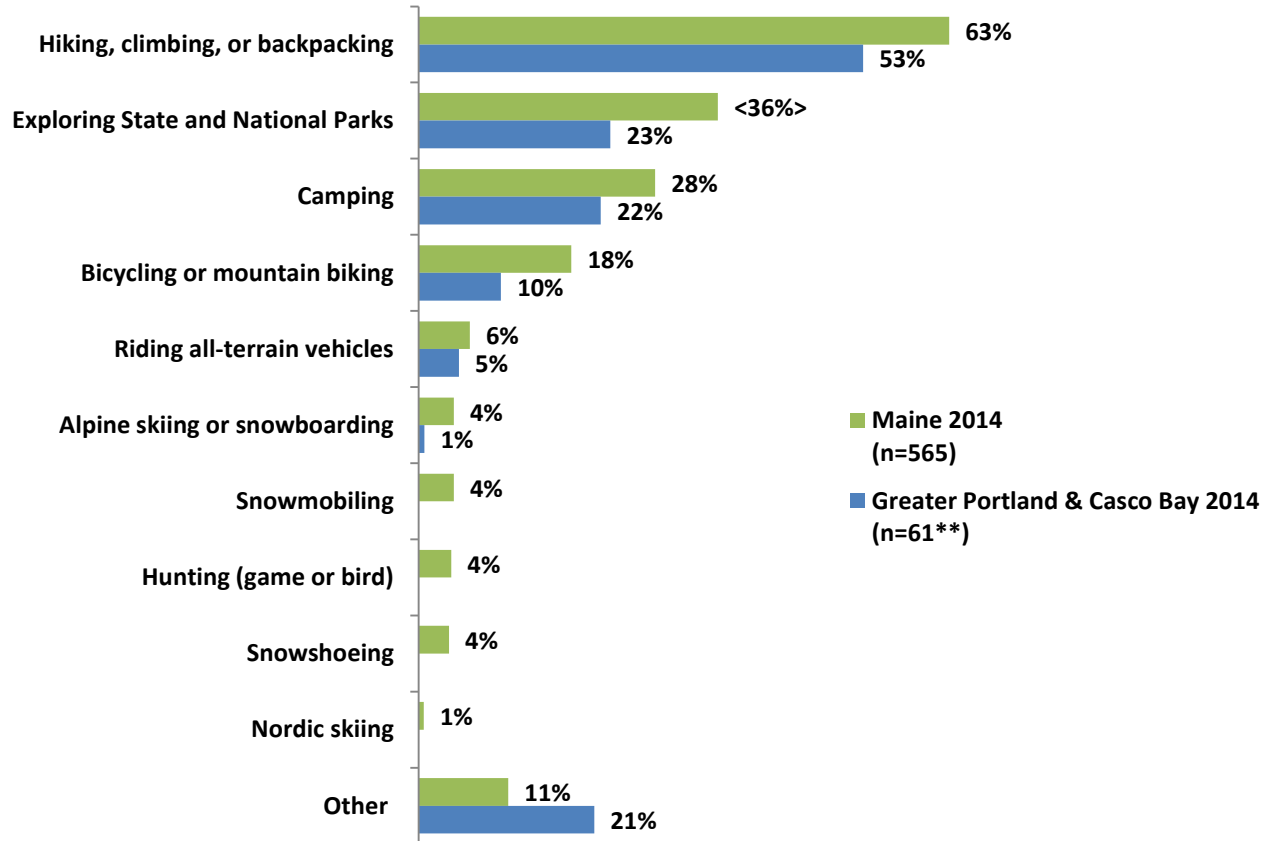
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Day visitors interested in active outdoor activities are most likely to be *hiking/climbing/backpacking* while in the Greater Portland area.

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.

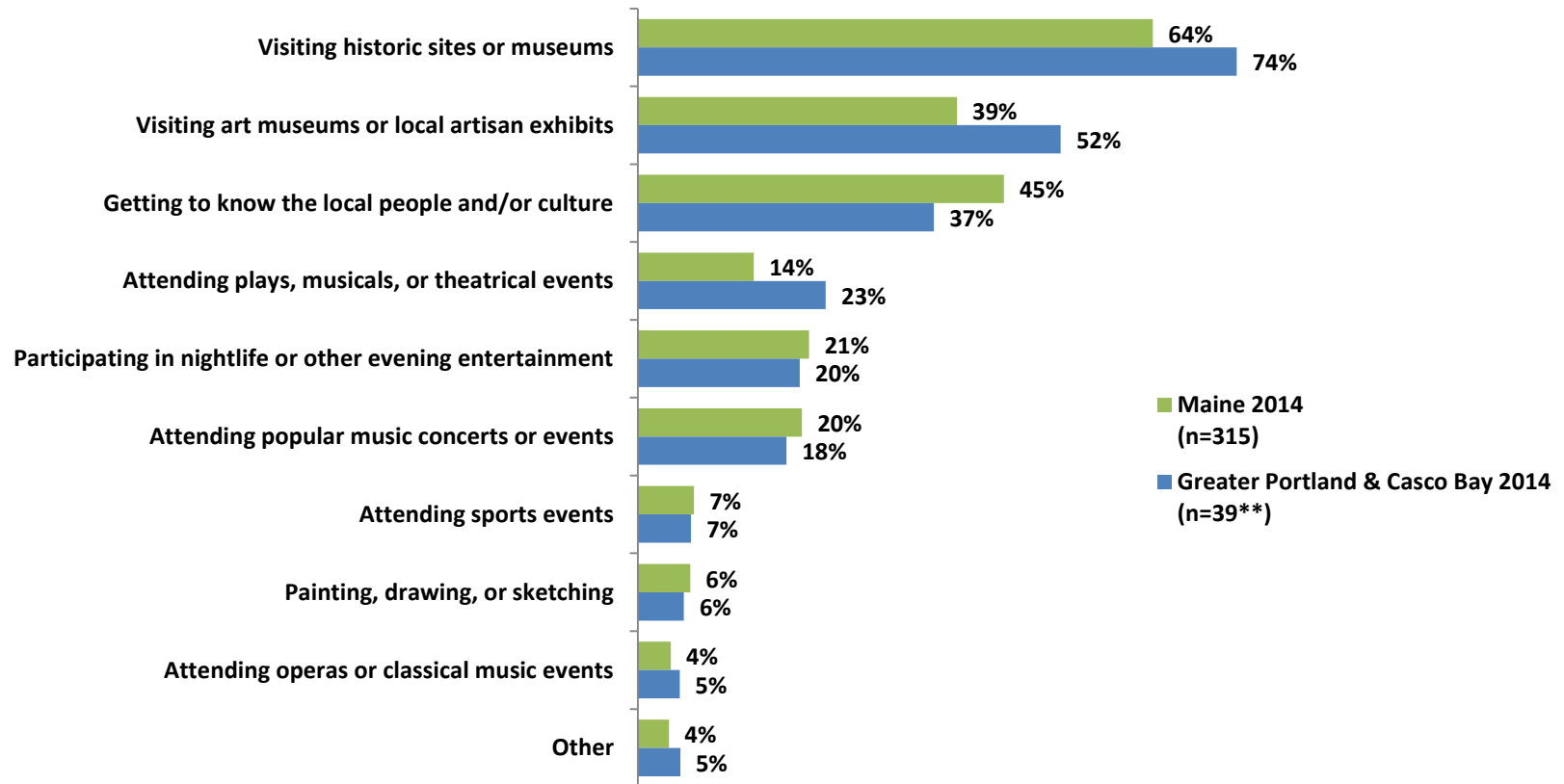
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Three-fourths of day visitors to this region who are interested in history or culture *visit historic sites or museums.*

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.

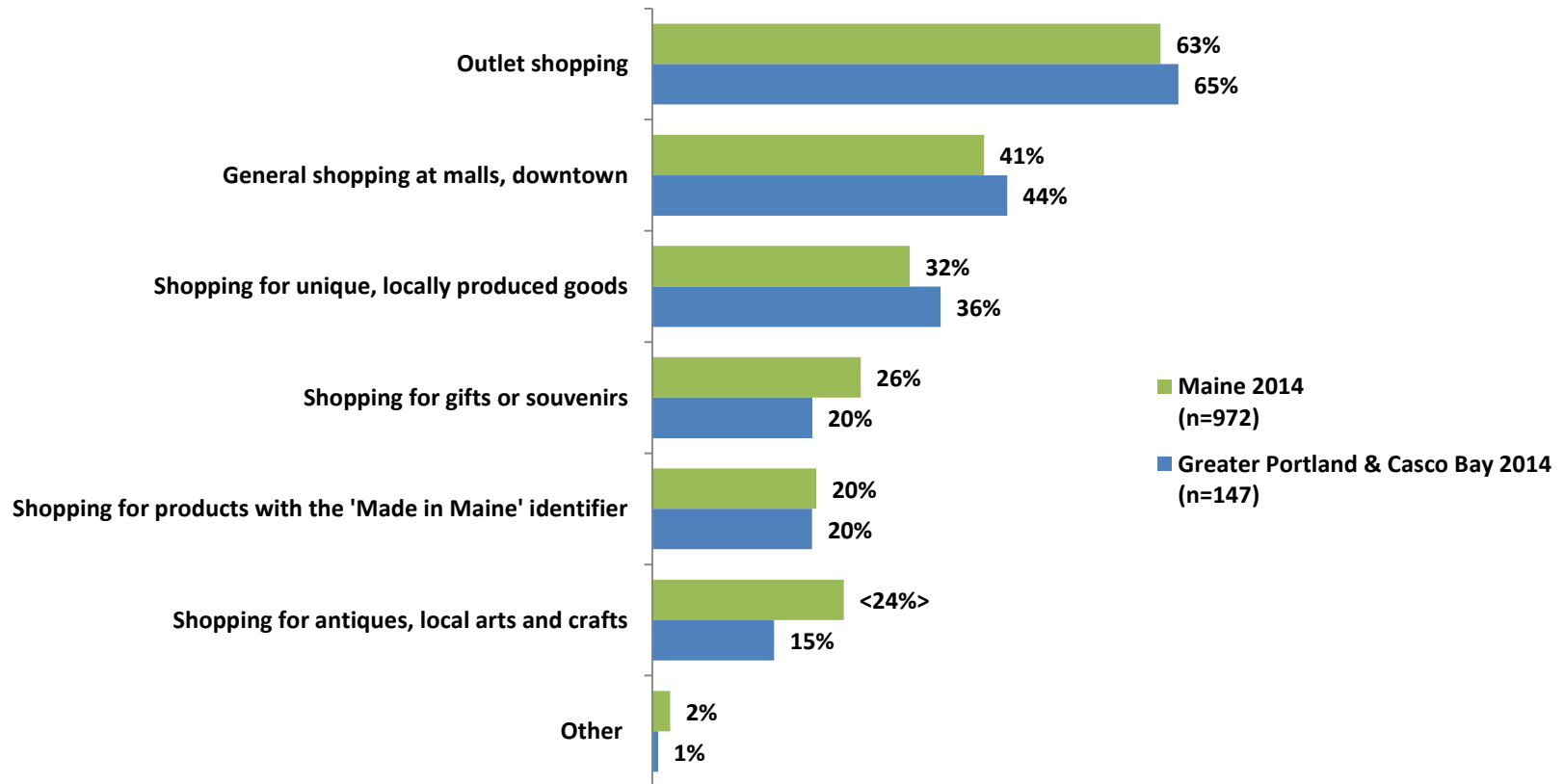
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Outlet shopping is the most common shopping activity among day trippers to the Greater Portland/Casco Bay area.

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.*

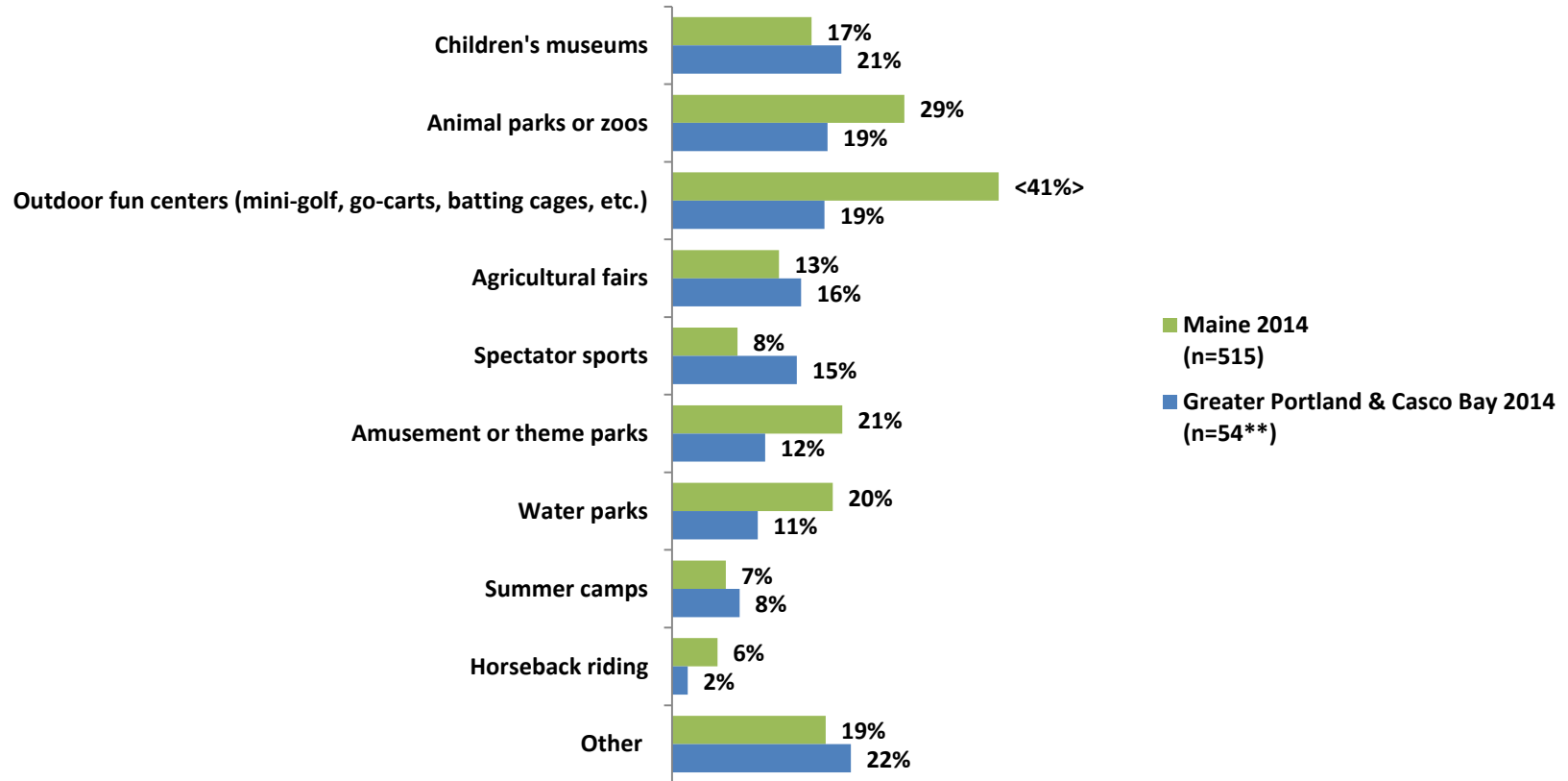
< > indicates a significant difference between subgroups at the 95% confidence level.

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

Day visitors to this region who are interested in family fun/children's activities participate in a variety of activities.

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.

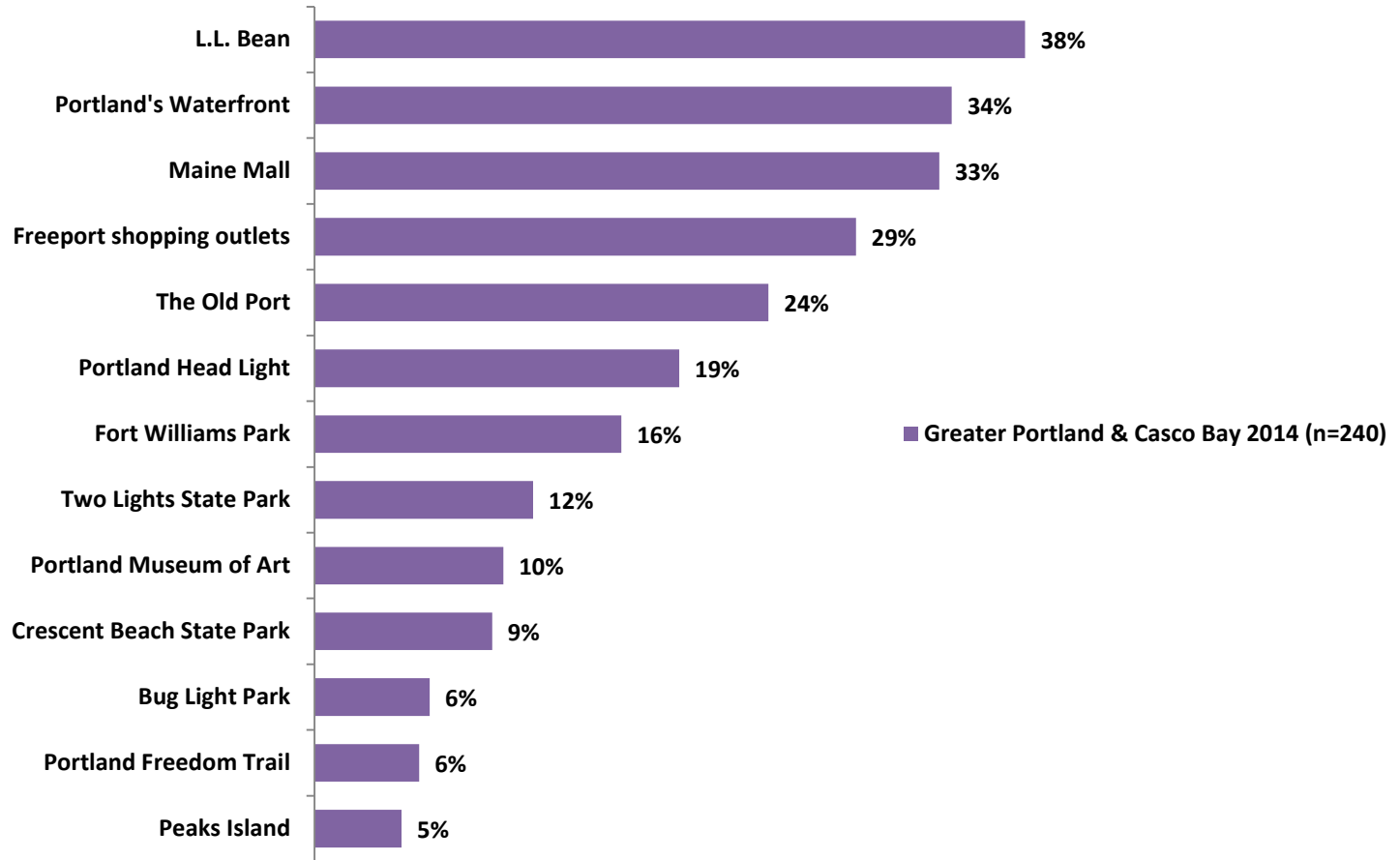
< > indicates a significant difference between subgroups at the 95% confidence level.

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

**Please note small sample size.

L.L. Bean garners the highest level of mentions for attractions visited in the region.

Top Attractions/Locations Visited



Q23: Within the region you visited, what specific attractions or locations did you visit? (Please check all that apply)

Comparison of *Greater Portland & Casco Bay* Visitors to Maine Visitors



Comparisons: Region vs. State

- Visitors to the Greater Portland/Casco Bay tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in some visitor demographics, their reasons for traveling, and the activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the many shopping and dining experiences available in the Greater Portland region and a more “urban” experience.
- Highlights – Greater Portland/Casco Bay region vs. State visitors:

Visitor Origin

- **A greater proportion** of overnight visitors to the region from **the United States**.
- **A lesser proportion** of overnight visitors to the region from **Canada**.

Visitor Demographics

- Both overnight and day visitors to the region have **higher annual household incomes** and are **more likely to have a college degree**.
- Both overnight and day visitors to the region are **less likely to be traveling with children**, and travel in **smaller groups**.
- Overnight visitors are **older** on average.

Comparisons: Region vs. State

- Highlights Continued:

First-Time/Repeat Visitation

- Overnight visitors **more** likely to be **repeat visitors** and **less** likely to be visiting for the **first time**.

Primary Purpose of VFR and Business Travel

- Overnight visitors on VFR travel **more** likely to be visiting for a **general visit to see friends and relatives** and **less** likely to be visiting for a **family reunion**.
- Business day visitors **less** likely to be in the area for a **convention/conference/trade show**.

Trip Interest Areas – Overnight and Day Visitors

- **Less** likely to want to pursue the following interest areas:
 - Water activities
 - Family fun/children’s activities
 - Active outdoor activities

Comparisons: Region vs. State

- Highlights Continued:

Maine Trip Interests and Importance (Importance Index)

Overnight and Day Visitors

- More likely to place importance on **shopping**
- Less likely to place importance on **water activities**

Overnight Visitors

- More likely to place importance on **food/beverage/culinary activities**
- Less likely to place importance on **family fun/children's activities** and **active outdoor activities**

Day Visitors

- Less likely to place importance on **touring/sightseeing**

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More likely to be:**
 - Enjoying the ocean views
 - Going to local brew pubs or craft breweries
 - Outlet shopping
 - Shopping at malls or downtown
- **Less likely to be:**
 - Enjoying the mountain views
 - Wildlife viewing/bird watching
 - Enjoying unique Maine food or beverages
 - Visiting Farmer’s Markets
 - Enjoying local food at fairs or festivals
 - Canoeing or kayaking
 - Bicycling or mountain biking
 - Alpine skiing or snowboarding
 - Visiting animal parks or zoos

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More likely to be:**
 - Going to the beach
- **Less likely to be:**
 - Visiting Farmer’s Markets
 - Visiting outdoor fun centers



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