

# Maine Office of Tourism Visitor Tracking Research

## Summer 2015 Seasonal Topline: Visitor Segment Addendum

*Prepared by*



October 2015

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# Visitor Segment Analysis - Background

- During 2014, DPA conducted a market segmentation study in collaboration with BVK, which allowed for the development of a predictive model to segment and prioritize Maine's visitors. The culmination of this research effort was the creation of a Segment Typing Tool – a model with a short list of questions that can be used to predict segment membership in subsequent research studies, including the ongoing Visitor Profile Research.
- As such, DPA added the questions required as inputs for the segment typing tool into the Visitor Profile questionnaire and began collecting this supplemental data as of January 2015. The intent is to use this typing tool to categorize Maine visitors from the ongoing research into the various segments developed to compare the perceptions, travel behaviors, and future travel intentions of visitors within the segments.
- This Visitor Segment Analysis serves as an addendum to the Summer 2015 Seasonal Topline completed in October 2015. In this addendum, Maine summer visitors are profiled by the consumer segments into which they fall, based on the Consumer Segmentation Study completed in 2014. Overnight and day visitors are presented separately.

# Visitor Segment Analysis - Background

- Five consumer segments are highlighted on the following pages:
  - Balanced Achievers
  - Genuine Originals
  - Obligated Traditionalists
  - Social Sophisticates
  - Comfortable Pragmatists
- Of these five segments, three are considered high priority segments for the Maine Office of Tourism and are marked in red throughout this report: **Balanced Achievers**, **Genuine Originals**, and **Social Sophisticates**.
- ***Important Note:*** Sample sizes are relatively low in this seasonal analysis, especially for Comfortable Pragmatists and **Social Sophisticates**. ***Please use caution in interpreting the findings particularly for these two segments.*** At the year-end completion of the 2015 research, an in-depth segmentation analysis will be completed for the entire year, at which time sample sizes will be sufficient to draw conclusions for all visitor segments.

# Visitor Segment Analysis – Summary Notes

- Perhaps not surprisingly, the three target segments (**Balanced Achievers**, **Genuine Originals**, and **Social Sophisticates**) tend to be more positively disposed to Maine than those not in target segments. This is particularly true among members of the **Balanced Achievers** segment. In particular, **Balanced Achievers** tend to stand out from the other two target segments on the following measures:
  - Younger
  - Come from the Mid-Atlantic region rather than New England
  - First-time visitors
  - Staying in Maine longer
  - Give higher ratings on most attributes
  - Higher intent to visit Maine again
  - Higher likelihood to recommend Maine

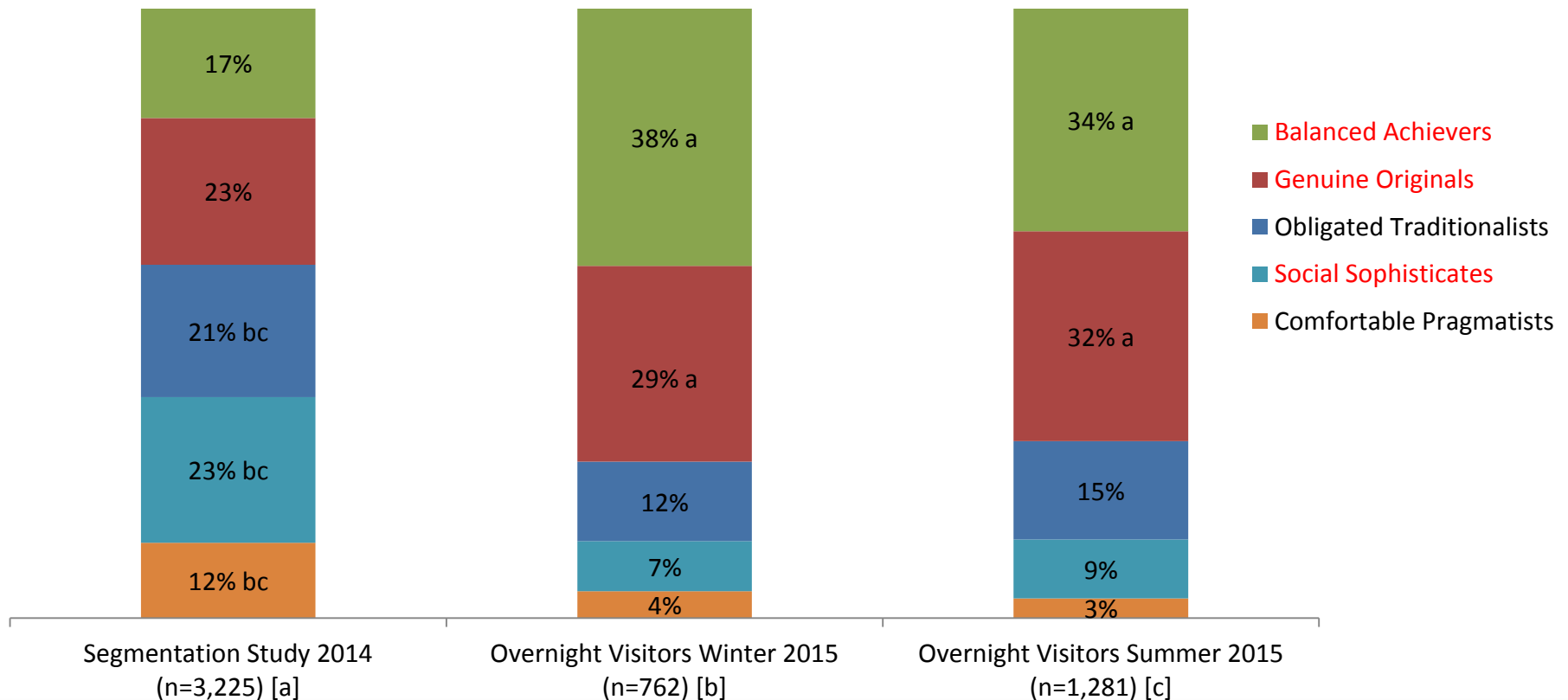
# Overnight Visitors



# Three-fourths of Maine overnight summer visitors fall into Maine's three priority segments: *Balanced Achievers*, *Genuine Originals*, and *Social Sophisticates*.

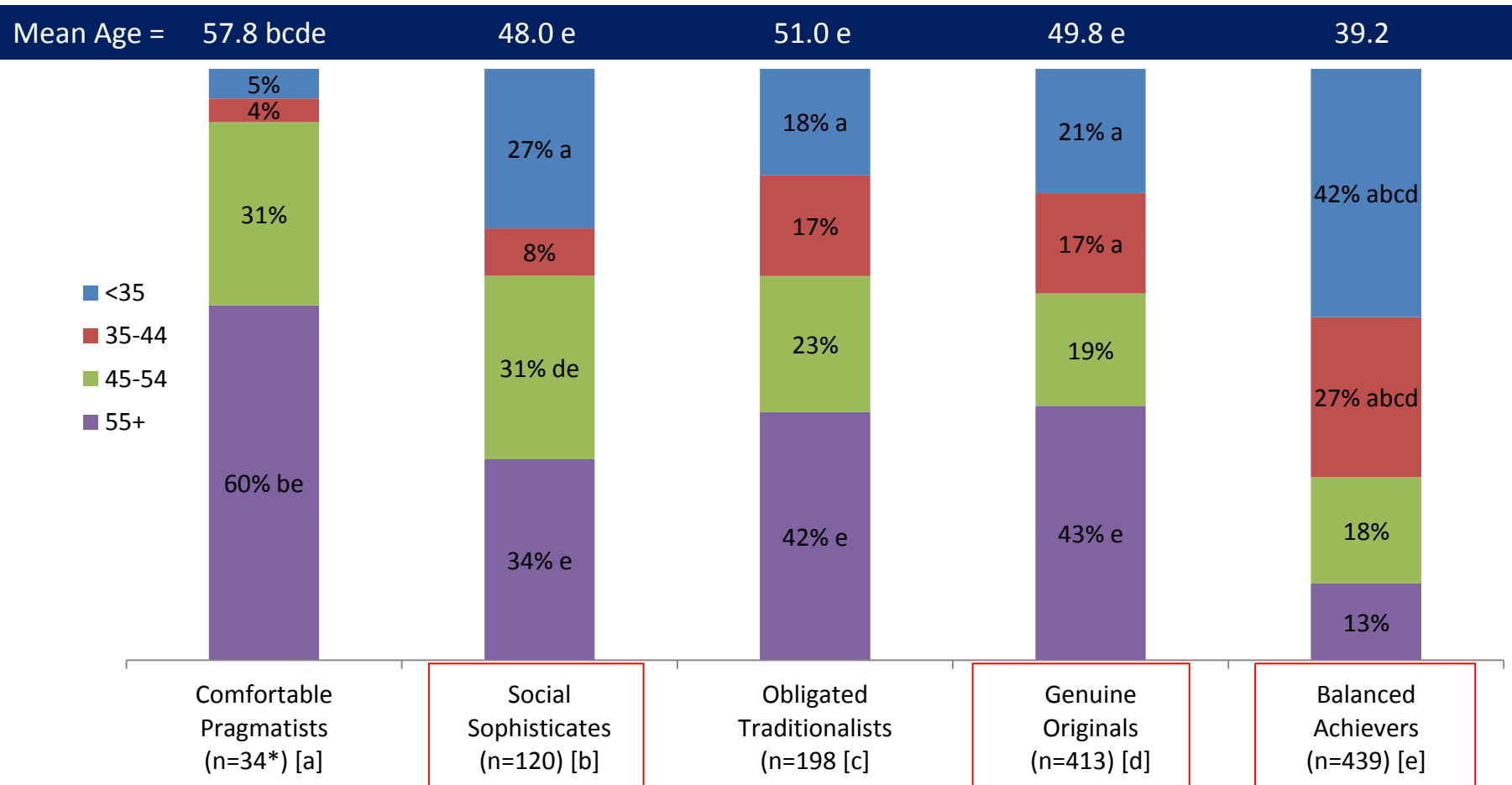
- Both Winter and Summer 2015 visitors are more likely than the general traveling population sampled in the 2014 Segmentation Study to fall into the *Balanced Achiever* and *Genuine Originals* segments.

**Visitor Segment Proportions:  
 2014 Segmentation Study vs. Winter and Summer 2015 Overnight Visitors**



The **Comfortable Pragmatists** skew older than the remaining visitor segments, while the **Balanced Achievers** are younger overall.

Age:  
Summer Overnight Visitors by Segment



Q1. How old are you?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.



Unlike other segments, **Balanced Achievers** are more likely to come from the Mid-Atlantic region than from New England.

State/Province of Residence:  
Summer Overnight Visitors by Segment

	Comfortable Pragmatists (n=34*) [a]	Social Sophisticates (n=120) [b]	Obligated Traditionalists (n=198) [c]	Genuine Originals (n=413) [d]	Balanced Achievers (n=439) [e]
<b>US (Net)</b>	<b>69%</b>	<b>89%</b>	<b>86%</b>	<b>88%</b>	<b>89%</b>
<b>New England (Net)</b>	<b>49%</b>	<b>58% e</b>	<b>59% e</b>	<b>58% e</b>	<b>34%</b>
MA	21% ce	39% acde	23%	26 e	14%
ME	16%	8%	12% e	12%e	6%
CT	3%	7%	7%	6%	6%
NH	10%	2%	8% b	6%	4%
RI	-	2%	5%	4%	3%
VT	-	-	4% e	3% e	<1%
<b>Mid Atlantic (Net)</b>	<b>20%</b>	<b>31%</b>	<b>27%</b>	<b>30%</b>	<b>55% abcd</b>
NY	17%	16%	17%	11%	26% bcd
NJ	-	10% c	3%	9% c	11% c
PA	-	2%	7%	7% b	11% b
MD	-	3%	1%	2%	6% cd
DE	3%	-	-	<1%	1%
<b>Canada (Net)</b>	<b>31%</b>	<b>11%</b>	<b>14%</b>	<b>12%</b>	<b>11%</b>
Ontario	8%	3%	6%	5%	5%
Quebec	11%	3%	2%	3%	3%
New Brunswick	10%	3%	4%	3%	3%

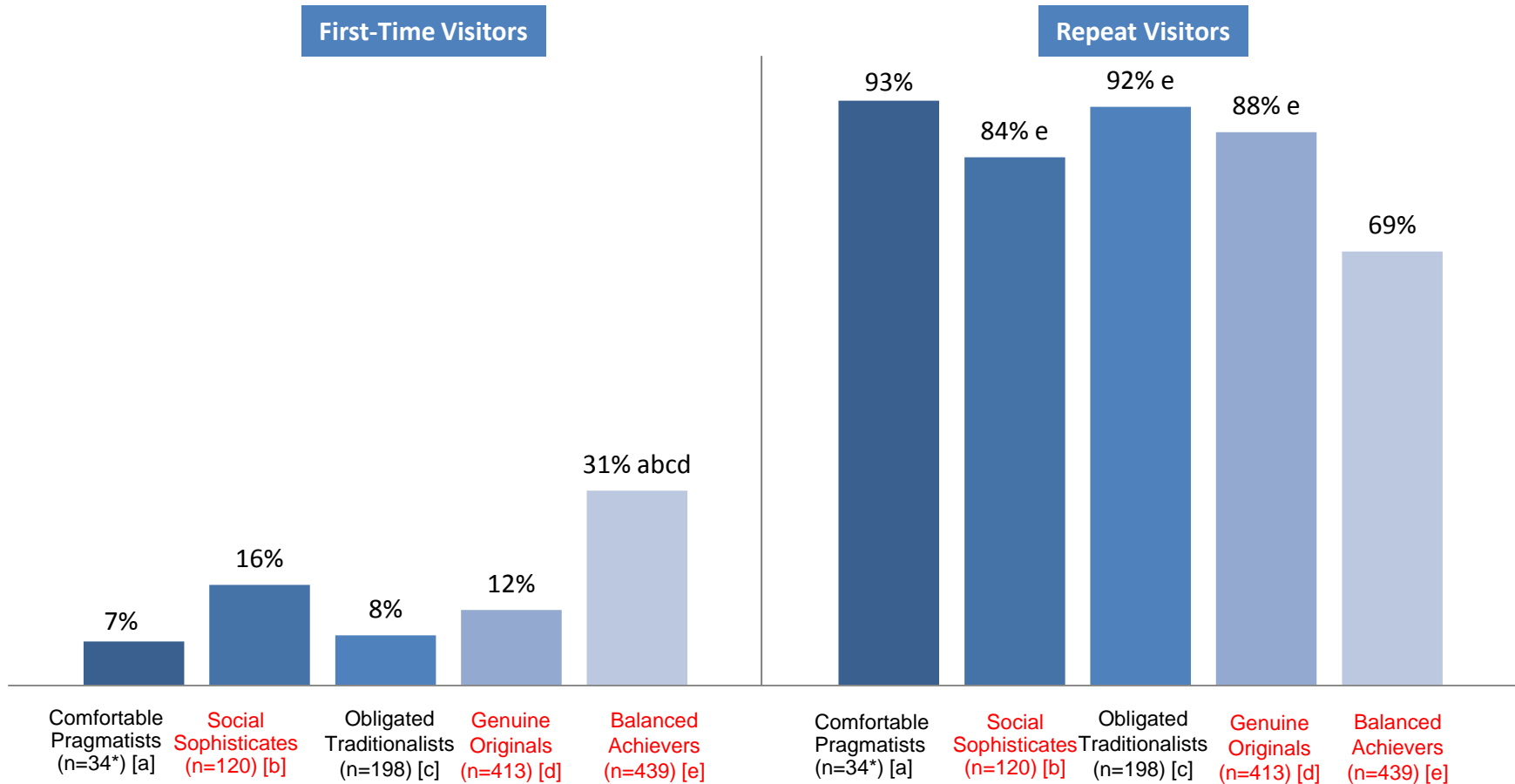
Q2. State/Province of Residence

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

**Balanced Achievers** are significantly more likely than other segments to be visiting Maine for the first time.

### First-Time versus Repeat Visitors: Summer Overnight Visitors by Segment



Q11. Was this your first visit to Maine?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

**Balanced Achievers** typically stay in Maine longer than travelers categorized in the other visitor segments.

**Type of Accommodation:  
 Summer Overnight Visitors by Segment**

	Comfortable Pragmatists (n=34*) [a]	Social Sophisticates (n=120) [b]	Obligated Traditionalists (n=198) [c]	Genuine Originals (n=413) [d]	Balanced Achievers (n=439) [e]
<b>Accommodation</b>					
Paid	63%	82% cd	65%	71%	76% c
Unpaid	37%	18%	35% be	29% b	24%
<b>Average Nights/Stay</b>	3.0	3.2	3.4	3.4	3.8 bd

<b>Paid Accommodation Type</b>					
Hotel/Motel/Resort	53%	63% d	53%	47%	58% d
Inn/B&B	3%	10%	4%	10% c	9% c
Rented Cabin/Cottage/Condo	3%	6%	5%	6%	6%
RV Park/Campground	-	-	2%	2%	3%

Q10. On this trip to Maine, how many nights were you away from home?

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

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

*\*Please note small sample size. Use caution in interpretation of findings.*

Overnight visitors falling into Maine’s three priority segments were significantly more likely to indicate that this trip to Maine exceeded their expectations, with **Balanced Achievers** providing the highest expectation ratings.

### Expectation Ratings of Recent Trip to Maine: Summer Overnight Visitors by Segment

Top 2 Box: Somewhat Above/Far Exceeded My Expectations	Comfortable Pragmatists (n=34*) [a]	Social Sophisticates (n=120) [b]	Obligated Traditionalists (n=198) [c]	Genuine Originals (n=413) [d]	Balanced Achievers (n=439) [e]
Overall experience	63%	75% c	52%	71% c	80% cd
Friendliness of people	71%	63%	51%	61%	77% bcd
Overall quality of customer service	43%	59% ac	45%	57% c	74% abcd
Welcoming locals who make visitors feel comfortable	50%	64% c	42%	55% c	75% acd
Quality of dining	38%	62% ac	44%	56% c	73% acd
Distinctive, genuine, and unique experiences	39%	53% c	38%	55% c	74% abcd
Overall value for the money	35%	58% ac	36%	47% c	70% acd
Quality of lodging	28%	50% ac	36%	45%	69% abcd
Authentic communities with their own individual personalities	46%	57% c	36%	53% c	72% abcd
Variety of activities available	31%	47%	39%	53% ac	72% abcd
Accessible, diverse, and abundant shopping choices	32%	56% acd	34%	42% a	70% abcd
Availability of lodging	24%	50% a	37%	41%	71% abcd
Availability of family dining	18%	46% a	39% a	39% a	70% abcd
Availability of fine dining	13%	54% ac	34% a	44% ac	69% abcd
Great selection of family attractions and venues	17%	40% a	33%	44% ac	71% abcd

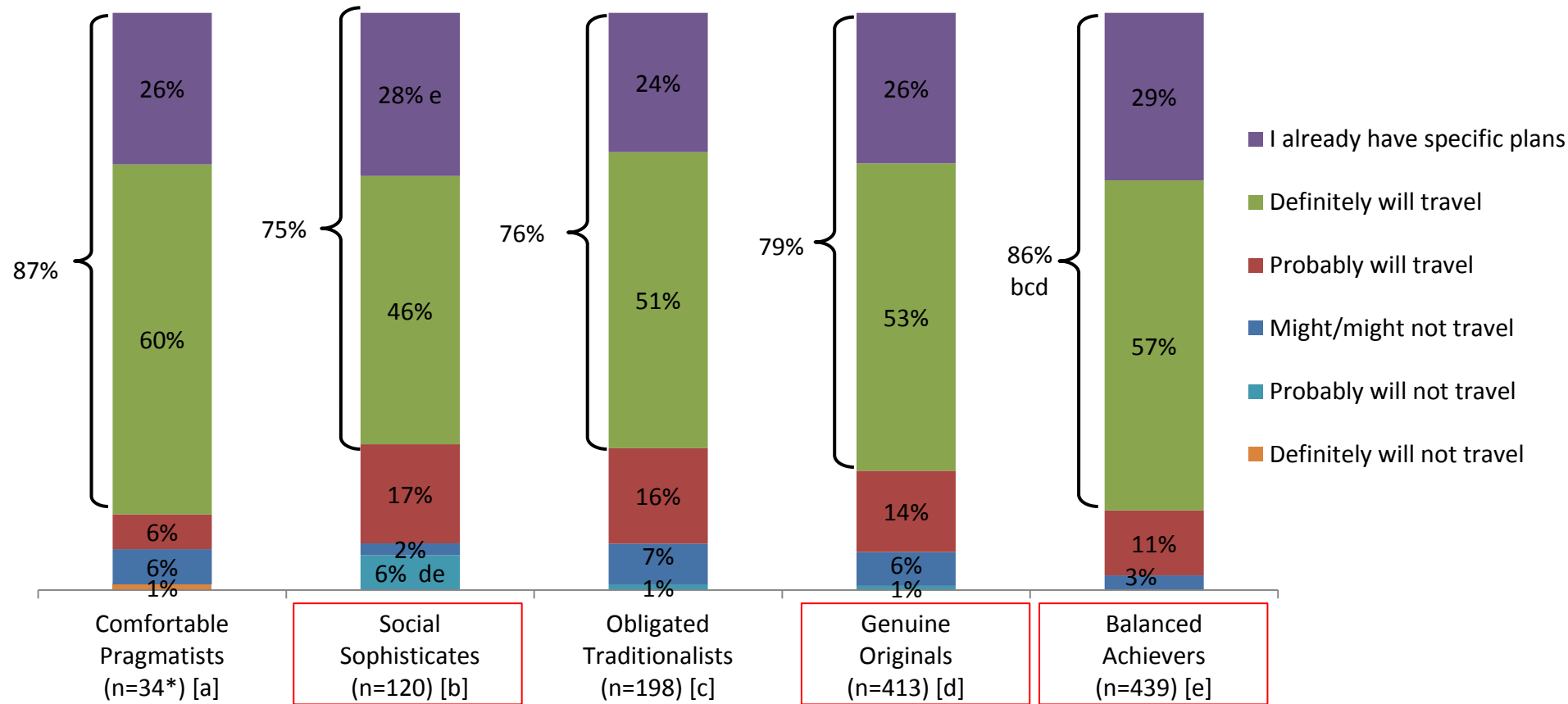
Q35. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

# Claimed intent to visit Maine again in the next two years is highest for **Balanced Achievers**.

Likelihood of Trip to Maine in Next Two Years:  
 Summer Overnight Visitors by Segment



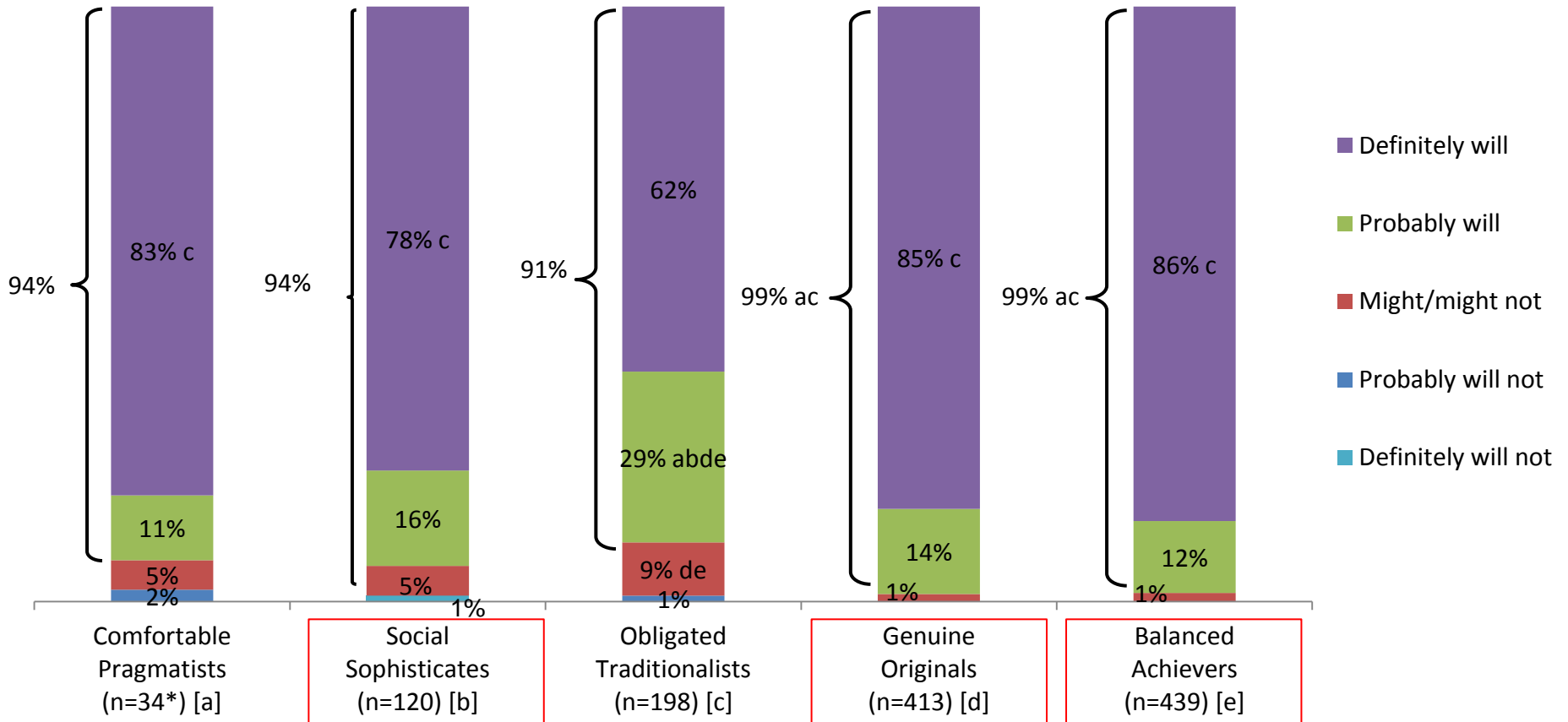
Q38. How likely will you be to travel in Maine in the next two years?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

# **Genuine Originals** and **Balanced Achievers** are the most likely to indicate that they will recommend Maine as a vacation destination.

## Likelihood of Recommending Maine: Summer Overnight Visitors by Segment



Q39. How likely are you to recommend Maine as a vacation destination to friends or relatives?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

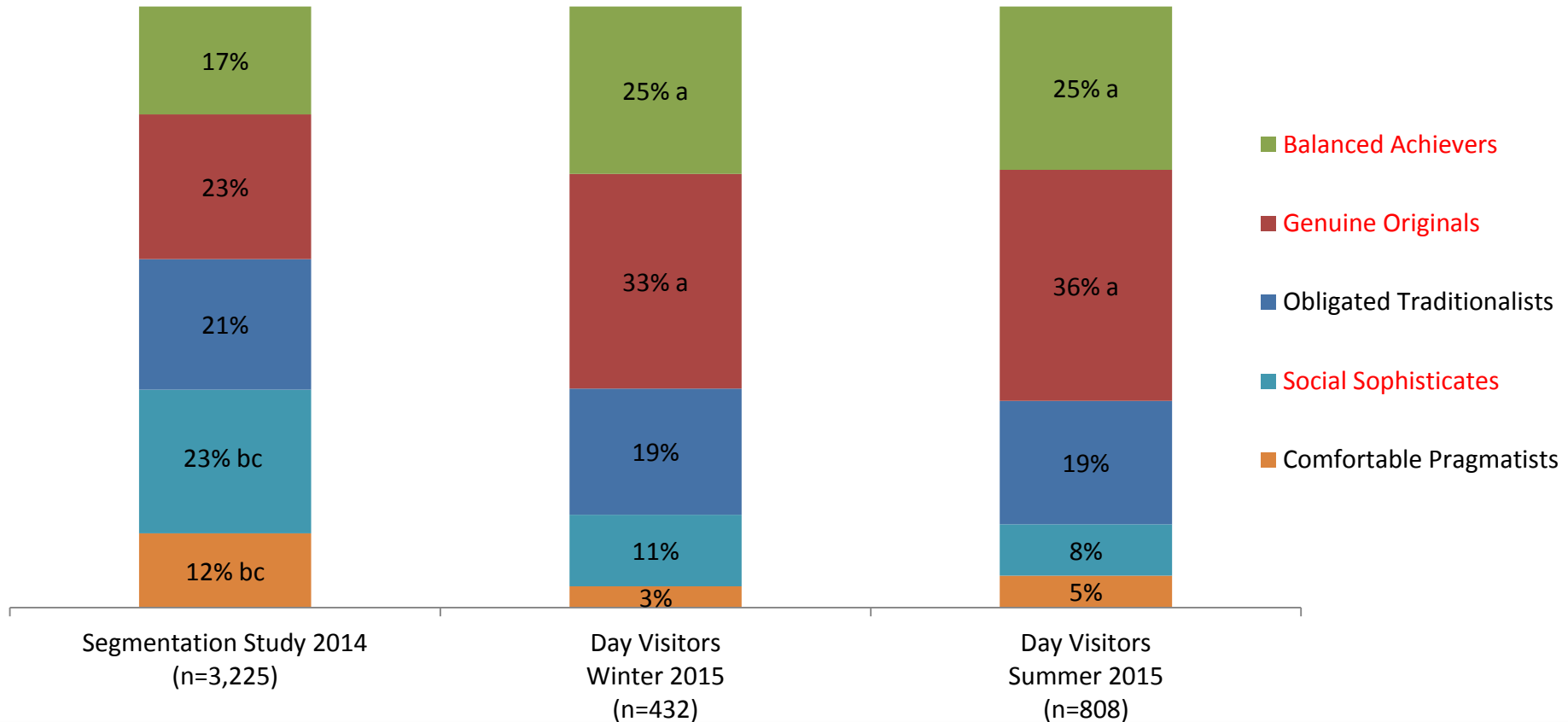
# Day Visitors



# Two-thirds of summer day visitors belong to Maine’s three priority segments: *Balanced Achievers*, *Genuine Originals*, and *Social Sophisticates*.

- Similar to the overnight visitors, Maine’s Summer 2015 day visitors are more likely than the general traveling population sampled in the 2014 Segmentation Study to fall into the *Balanced Achiever* and *Genuine Originals* segments.

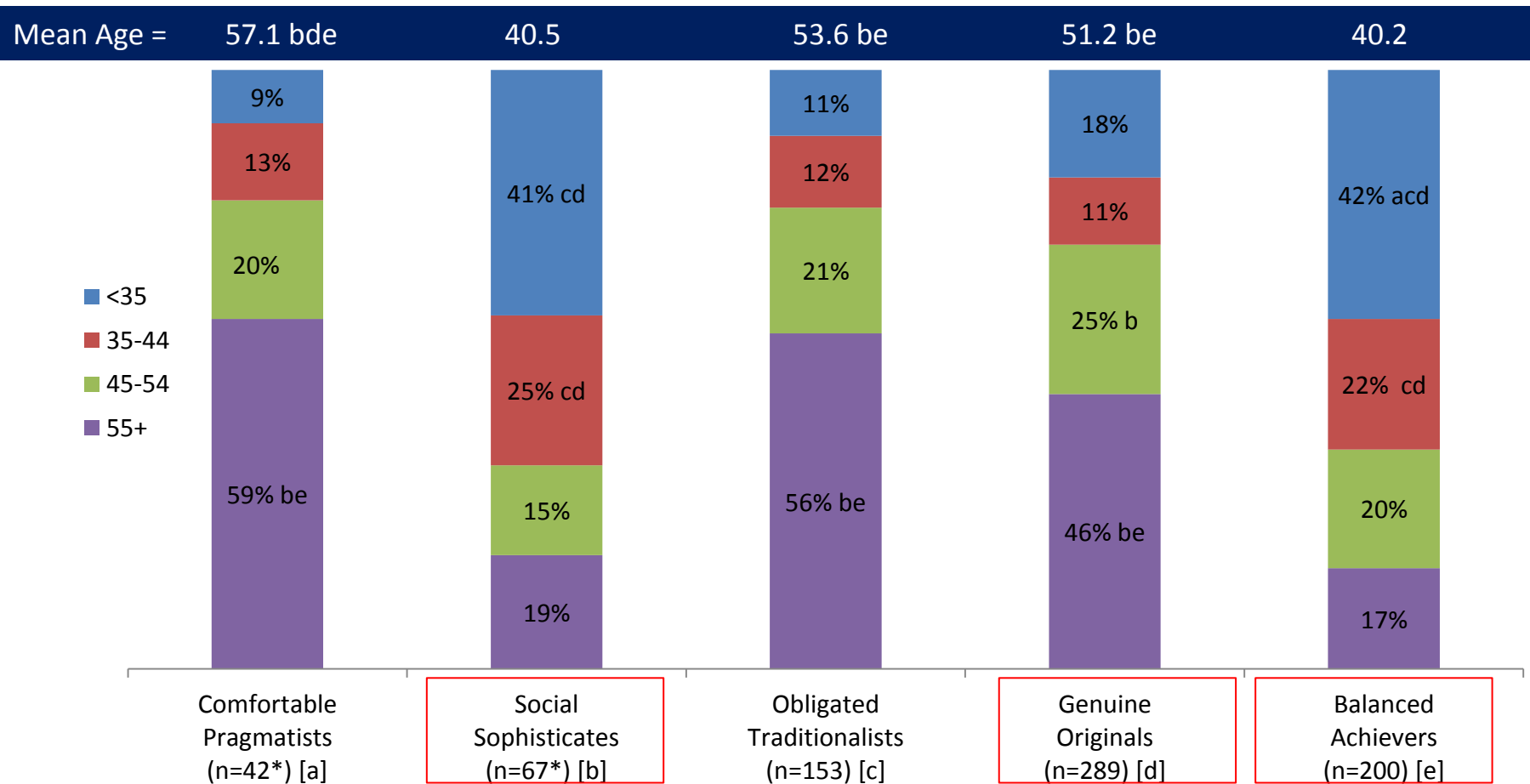
**Visitor Segment Proportions:  
 2014 Segmentation Study vs. Winter and Summer 2015 Day Visitors**





# Among summer day visitors, two priority segments, **Social Sophisticates** and **Balanced Achievers**, skew slightly lower on age.

Age:  
 Summer Day Visitors by Segment



Q1. How old are you?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

# Regardless of visitor segment, most summer day visitors are in-state visitors or come from Massachusetts.

- *Obligated Traditionalists* and *Genuine Originals* are more likely to be found among in-state summer day visitors.

## State/Province of Residence: Summer Day Visitors by Segment

	Comfortable Pragmatists (n=42*) [a]	Social Sophisticates (n=67*) [b]	Obligated Traditionalists (n=153) [c]	Genuine Originals (n=289) [d]	Balanced Achievers (n=200) [e]
<b>US (Net)</b>	<b>98% e</b>	<b>90%</b>	<b>92%</b>	<b>93%</b>	<b>87%</b>
MA	40%	57% cd	34%	39%	51% cd
ME	33%	22%	38% be	37% be	22%
NH	22%	9%	20% b	15%	11%
VT	-	2%	-	3%	1%
<b>Canada (Net)</b>	<b>2%</b>	<b>10%</b>	<b>8%</b>	<b>7%</b>	<b>13% a</b>
New Brunswick	2%	3%	6%	4%	6%
Quebec	-	7%	2%	2%	6%

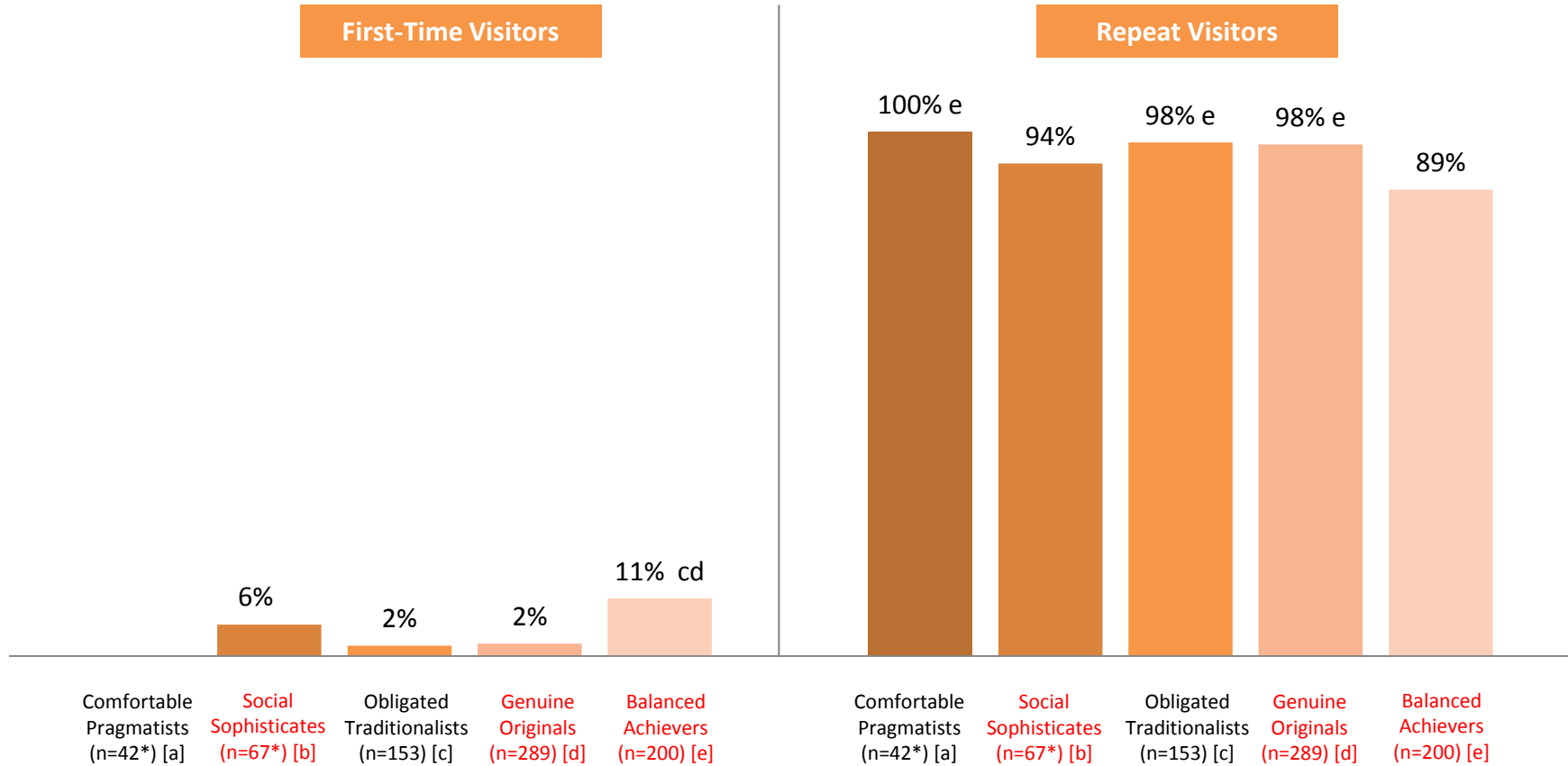
Q2. State/Province of Residence

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\*Please note small sample size. Use caution in interpretation of findings.

Though the number is lowest for **Balanced Achievers**, most summer day visitors have been to Maine previously.

### First-Time versus Repeat Visitors: Summer Day Visitors by Segment



Q10. Was this your first visit to Maine?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

Among summer day visitors, **Balanced Achievers** are the most likely, by a large margin, to report that their trip to Maine exceeded their expectations.

### Expectation Ratings of Recent Trip to Maine: Summer Day Visitors by Segment

Top 2 Box: Somewhat Above/Far Exceeded My Expectations	Comfortable Pragmatists (n=42*) [a]	Social Sophisticates (n=67*) [b]	Obligated Traditionalists (n=153) [c]	Genuine Originals (n=289) [d]	Balanced Achievers (n=200) [e]
Overall experience	49%	71% ac	47%	68% ac	73% ac
Friendliness of people	40%	70% ac	37%	57% c	69% acd
Quality of dining	39%	63% ac	38%	54% c	65% acd
Overall quality of customer service	42%	70% acd	32%	55% c	64% ac
Welcoming locals who make visitors feel comfortable	30%	56% ac	30%	53% ac	62% ac
Distinctive, genuine, and unique experiences	26%	62% ac	38% a	57% ac	65% ac
Overall value for the money	23%	57% ac	34%	48% ac	60% acd
Authentic communities with their own individual personalities	27%	56% ac	28%	53% abc	61% ac
Variety of activities available	41%	54% c	26%	55% c	63% ac
Availability of family dining	25%	50% ac	30%	44% ac	62% acd
Accessible, diverse, and abundant shopping choices	26%	54% ac	30%	44% ac	64% acd
Great selection of family attractions and venues	26%	47% ac	24%	45% ac	64% abcd
Availability of fine dining	24%	37%	28%	34%	62% abcd

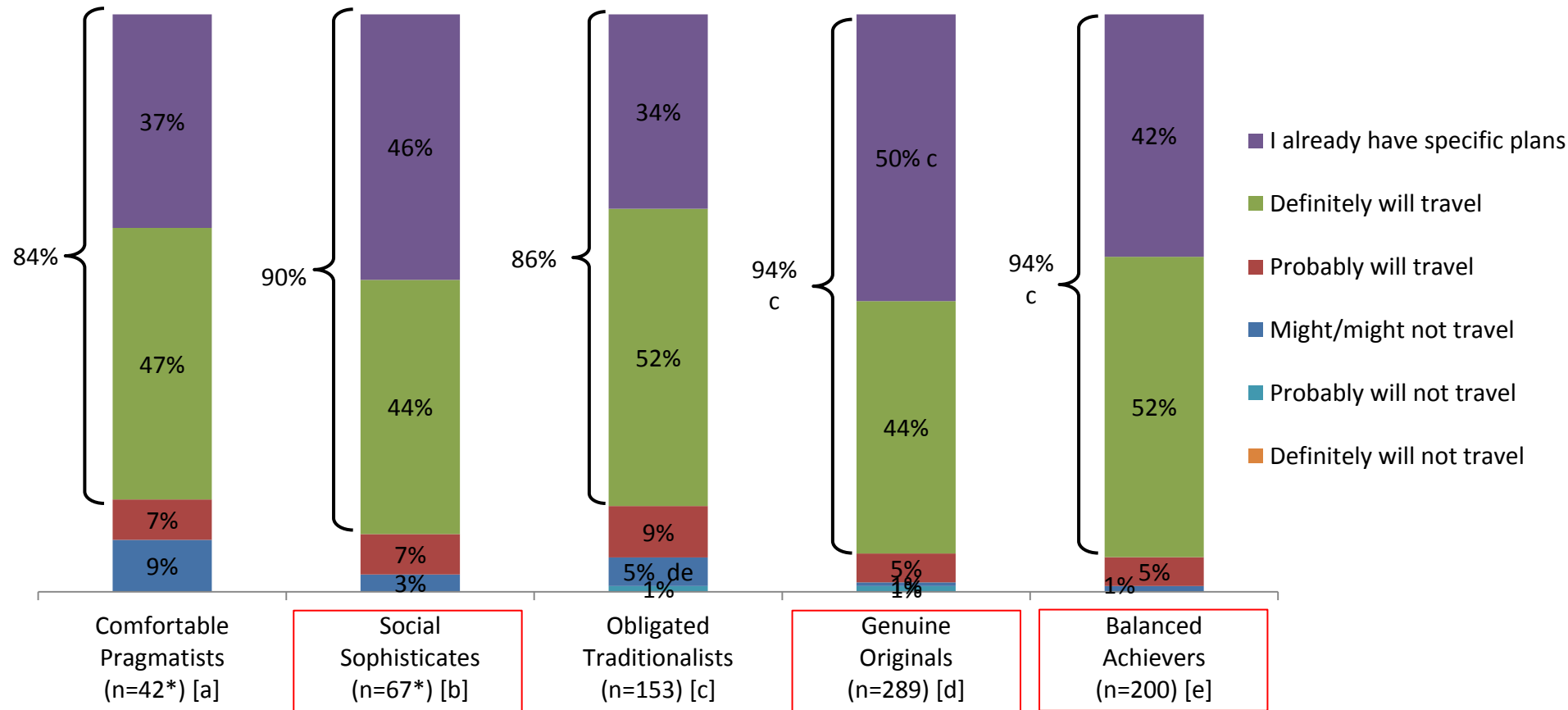
Q27. Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

# Similar to overnight visitors, intent to visit Maine again in the next two years is strong across all visitor segments.

## Likelihood of Trip to Maine in Next Two Years: Summer Day Visitors by Segment



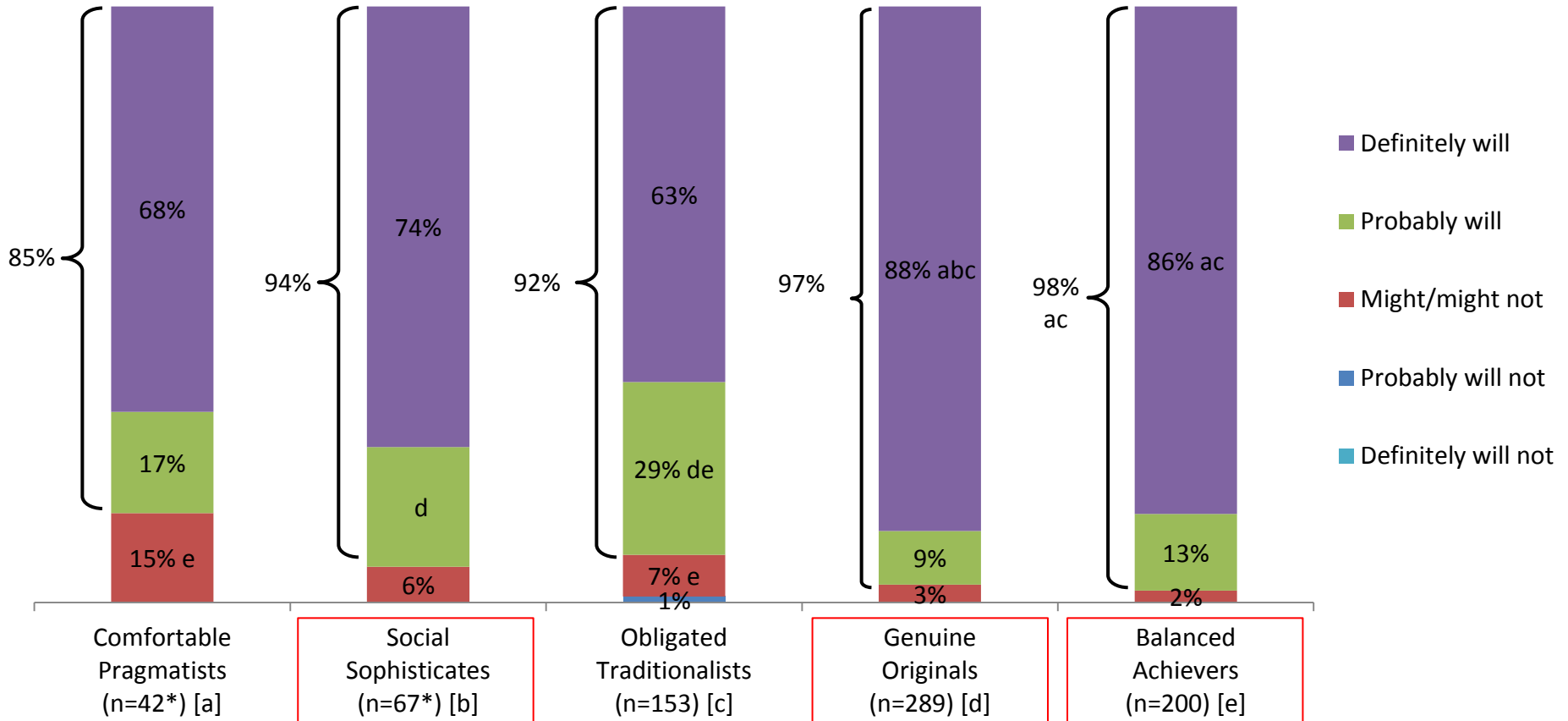
Q30. How likely will you be to travel in Maine in the next two years?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.

**Genuine Originals** and **Balanced Achievers** are particularly likely to recommend Maine as a vacation destination.

Likelihood of Recommending Maine:  
Summer Day Visitors by Segment



Q31. How likely are you to recommend Maine as a vacation destination to friends or relatives?

a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

\*Please note small sample size. Use caution in interpretation of findings.



DPA  
201 Lafayette Center  
Kennebunk, ME 04043  
207.985.1790  
[www.digitalresearch.com](http://www.digitalresearch.com)