

**Maine Office of Tourism
Visitor Tracking Research
2015 Calendar Year Annual Report**

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

Prepared by



May 2016

Table of Contents

Research Objectives and Methodology	4
First Time Overnight Visitors:	
Traveler Description	6
Trip Experience	12
First Time Day Visitors:	
Traveler Description	28
Trip Experience	34

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

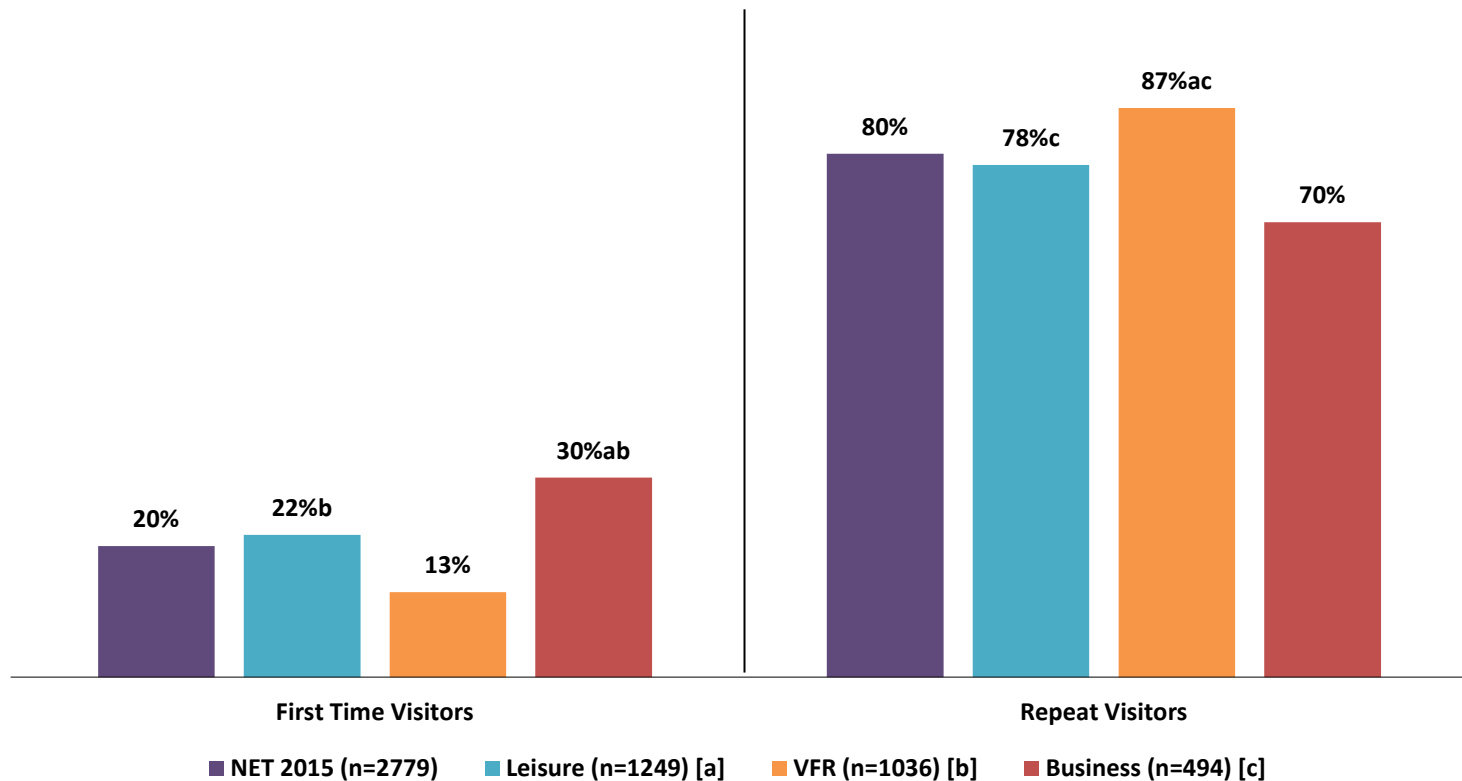
- Survey results were collected during calendar year 2015 for travel to Maine occurring from December 2014 through November 2015. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,779
 - Maine Day Visitor – 1,755
 - National Omnibus Survey – 17,812
- This report highlights data on **first-time visitors to Maine**, also comparing them to repeat visitors where appropriate. Reported results are based on:
 - 557 first-time overnight visitors, and
 - 95 first-time day visitors.
- Statistically significant differences between first-time visitors and repeat visitors are indicated by < > on the significant data.
- Statistically significant differences between 2014 and 2015 are also highlighted throughout this report. 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.

First-Time Overnight Visitors: *Traveler Description*

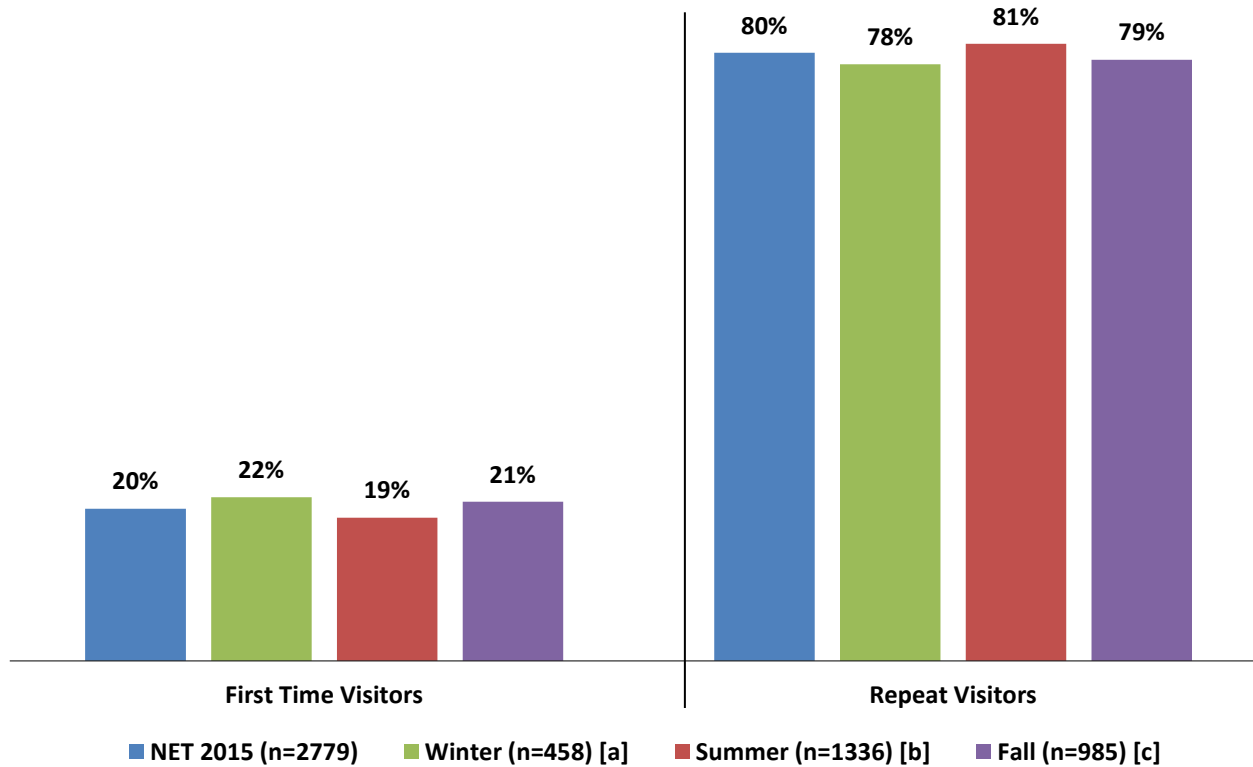


First-time visitors comprise one in five overnight visitors to Maine in 2015.

- 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.



There is very little seasonal variation in the proportion of first-time and repeat visitors.



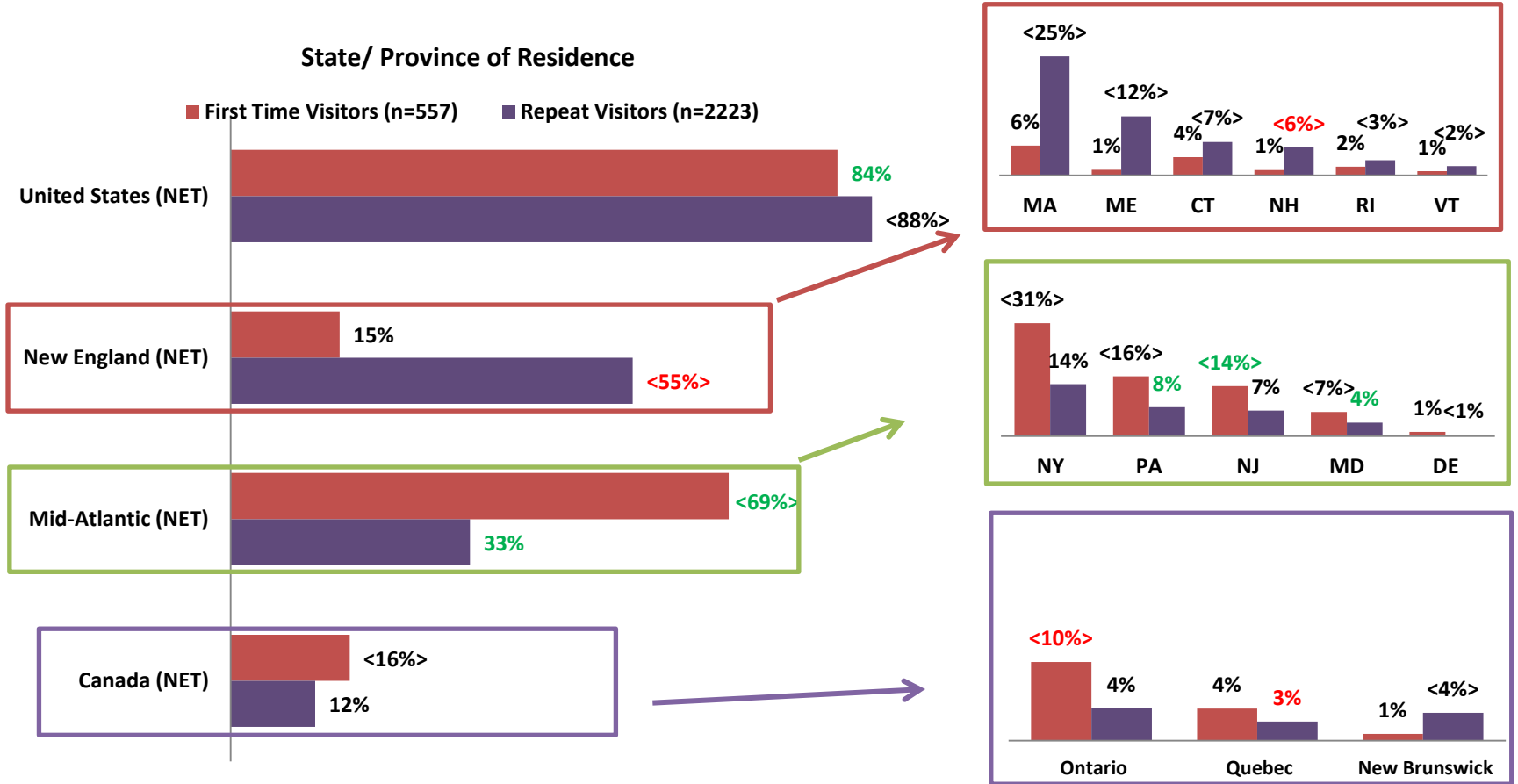
Overnight Visitor Demographics

- First-time overnight visitors to Maine are in their mid-30s and earn average annual household incomes just over \$100,000. Three-fourths have a college degree, and 59% are married. Three in four are employed full-time.
- 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 visitors.

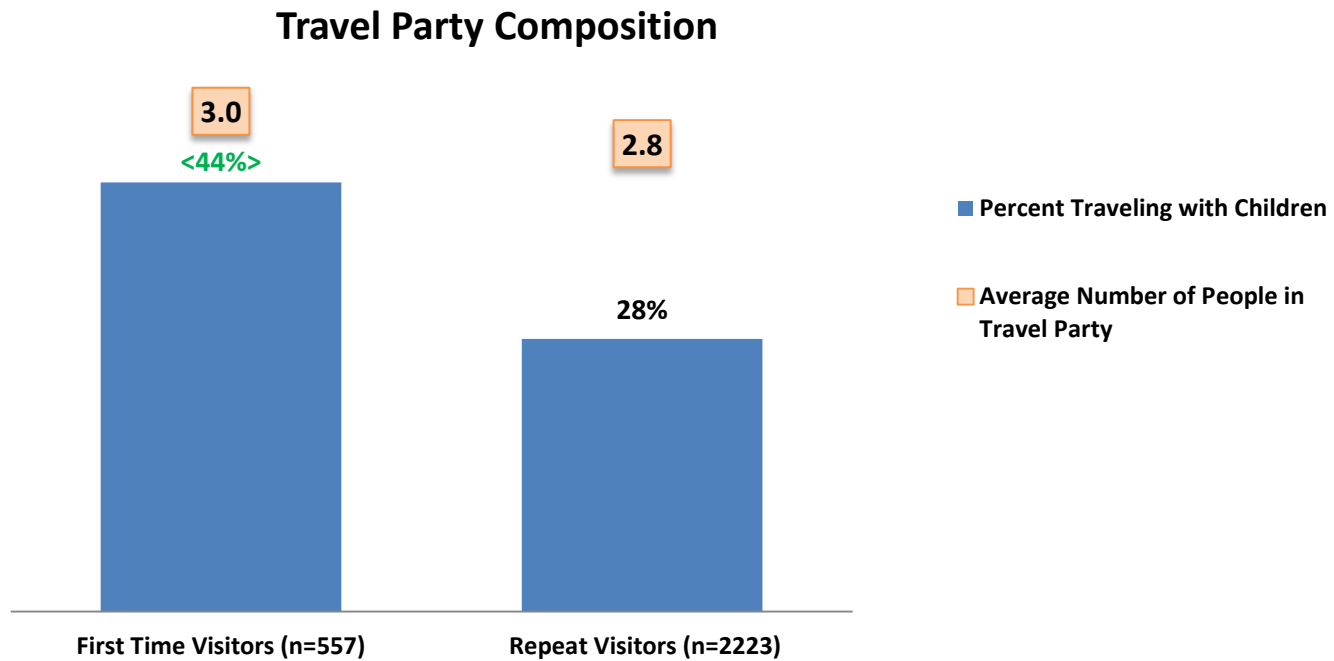
2015 Overnight Visitors	First Time Visitors (n=557)	Repeat Visitors (n=2223)
Age:		
< 35	<49%>	25%
35 - 44	<27%>	17%
45 - 54	14%	<20%>
55 +	9%	<37%>
Mean Age (Years)	36.5	<47.7>
Income:		
< \$50,000	17%	17%
\$50,000 - \$99,000	44%	40%
\$100,000 +	39%	43%
Mean Income (Thousands)	\$101,530	\$104,330
Female	55%	59%
College Degree or Higher	76%	72%
Married	59%	<65%>
Employed Full Time	<73%>	60%

Four in five 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 repeat visitors, while overnight visitors from the Mid-Atlantic states are more likely to be first-time visitors.
- Canadian overnight visitors are more likely to be visiting Maine for the first time, particularly those from Ontario.



Forty-four percent of first-time visitors are traveling with children, a significantly greater proportion when compared to repeat visitors.

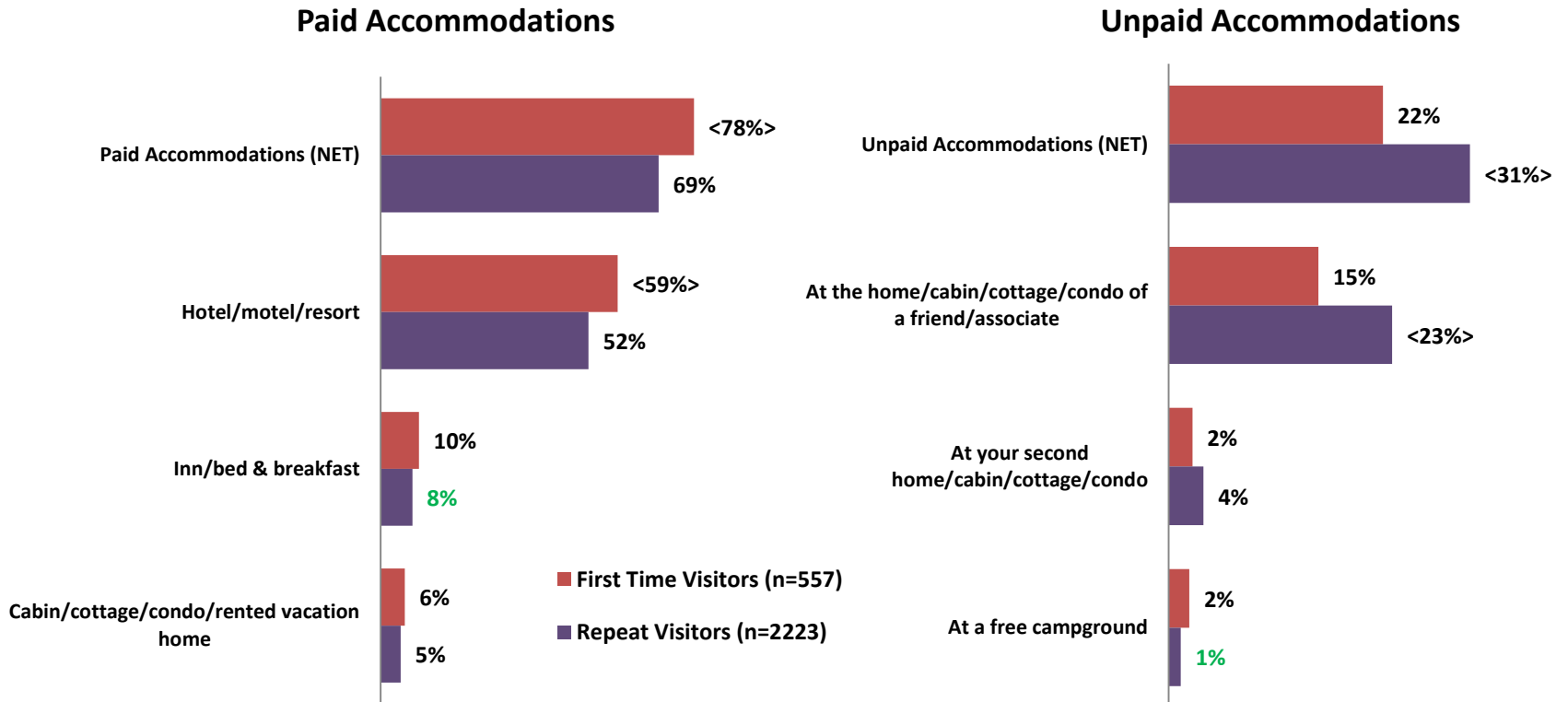


First-Time Overnight Visitors: *Trip Experience*



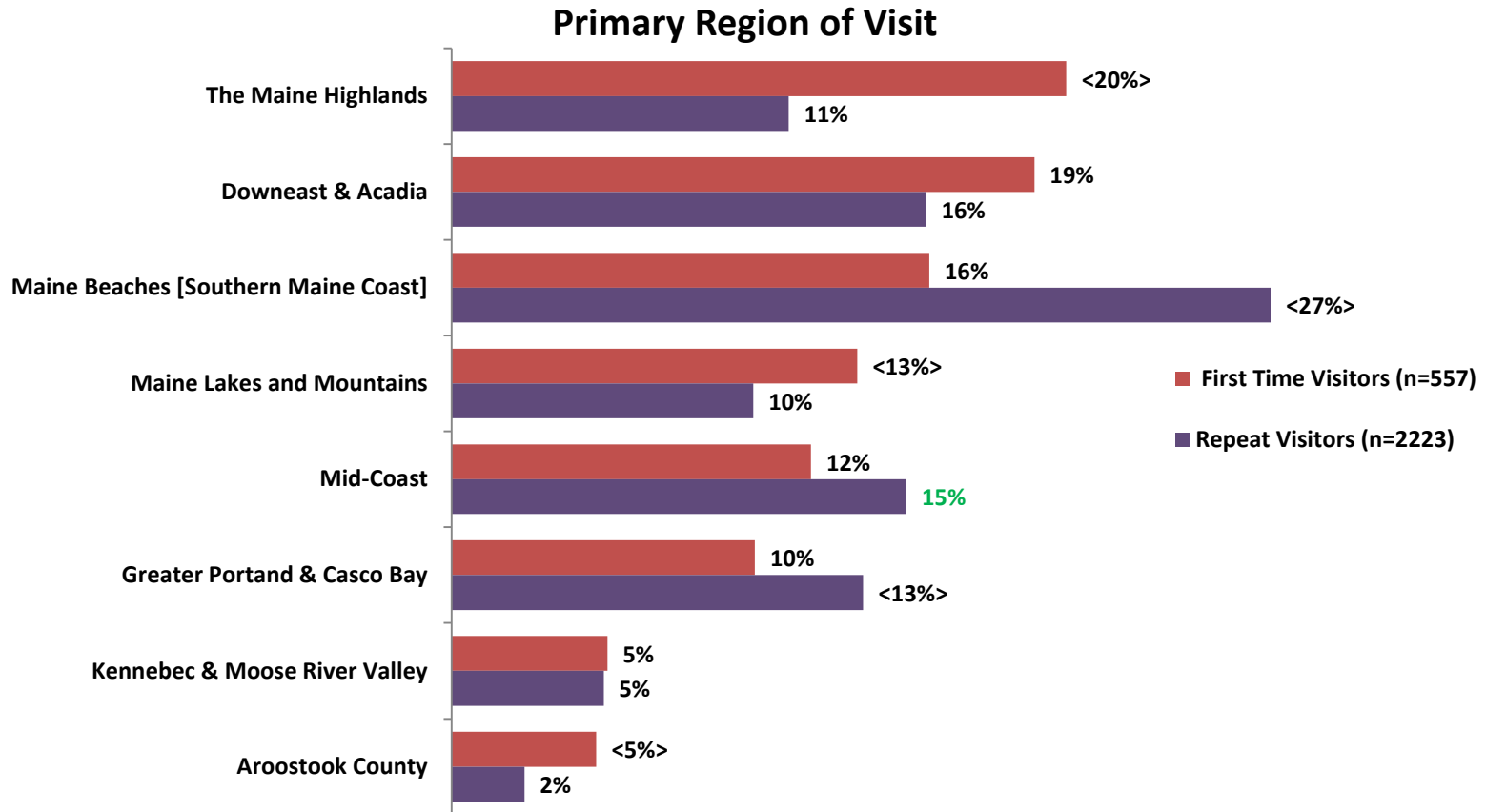
Three-fourths of first-time visitors stayed in paid accommodations while visiting Maine.

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

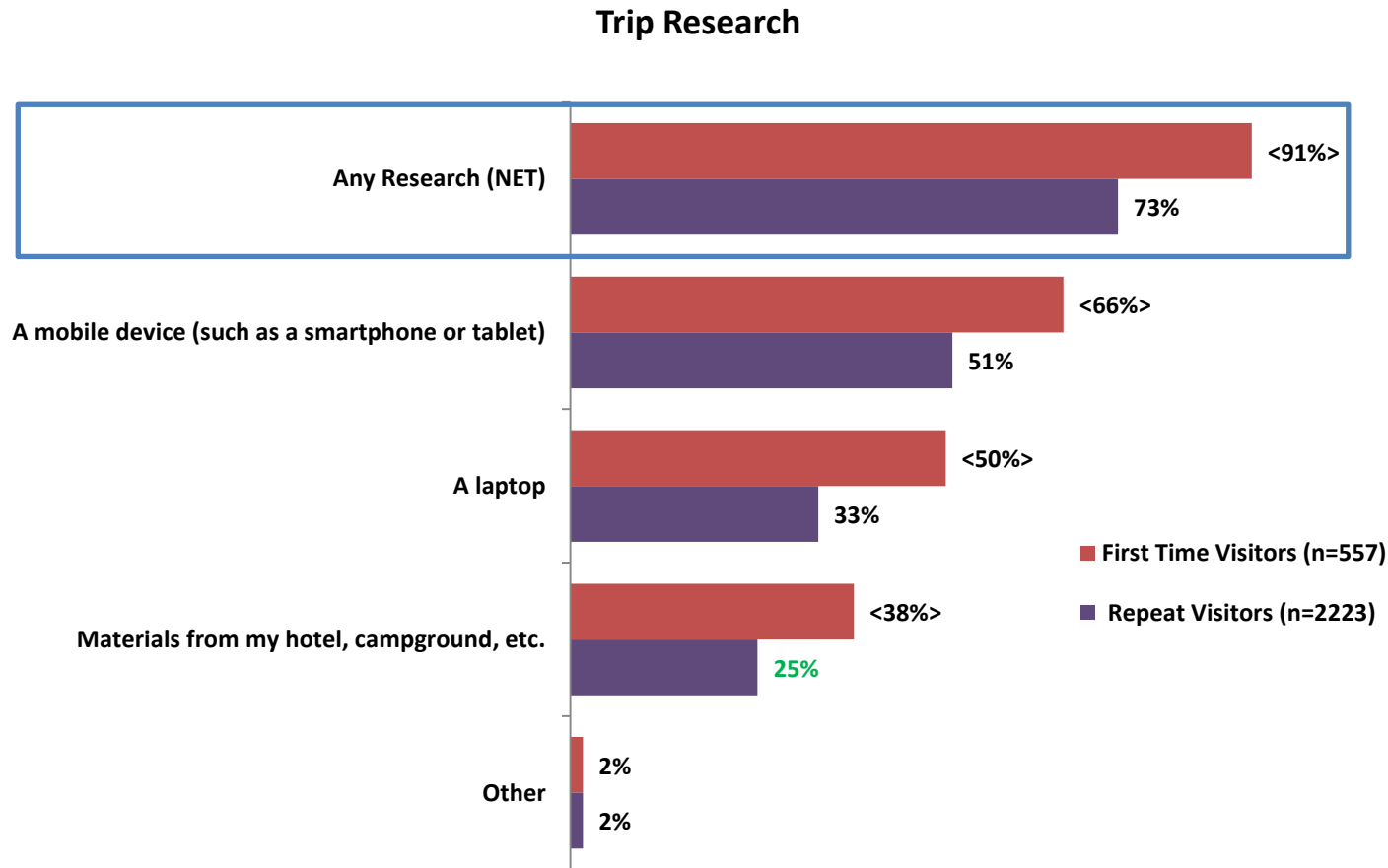


First-time overnight visitors are most likely to be visiting the *Maine Highlands* and the *Downeast & Acadia* region.

- First-time visitors are more likely than repeat visitors to be heading to the *Maine Highlands* or the *Lakes & Mountains* region, while repeat visitors are more likely to be visiting the *Maine Beaches* or the *Greater Portland & Casco Bay* regions.



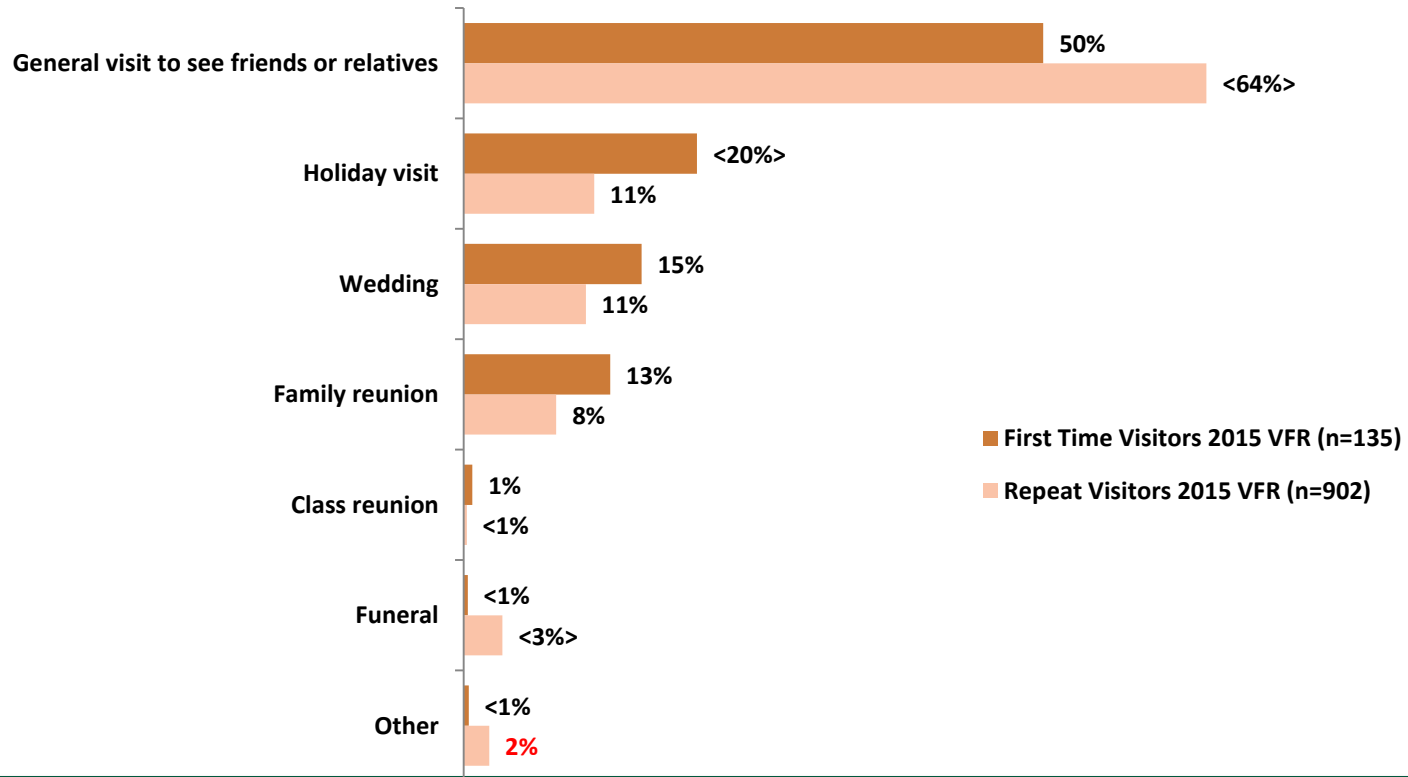
Nine in ten first-time visitors continue to research Maine during their trip, a significantly greater proportion than repeat visitors.



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

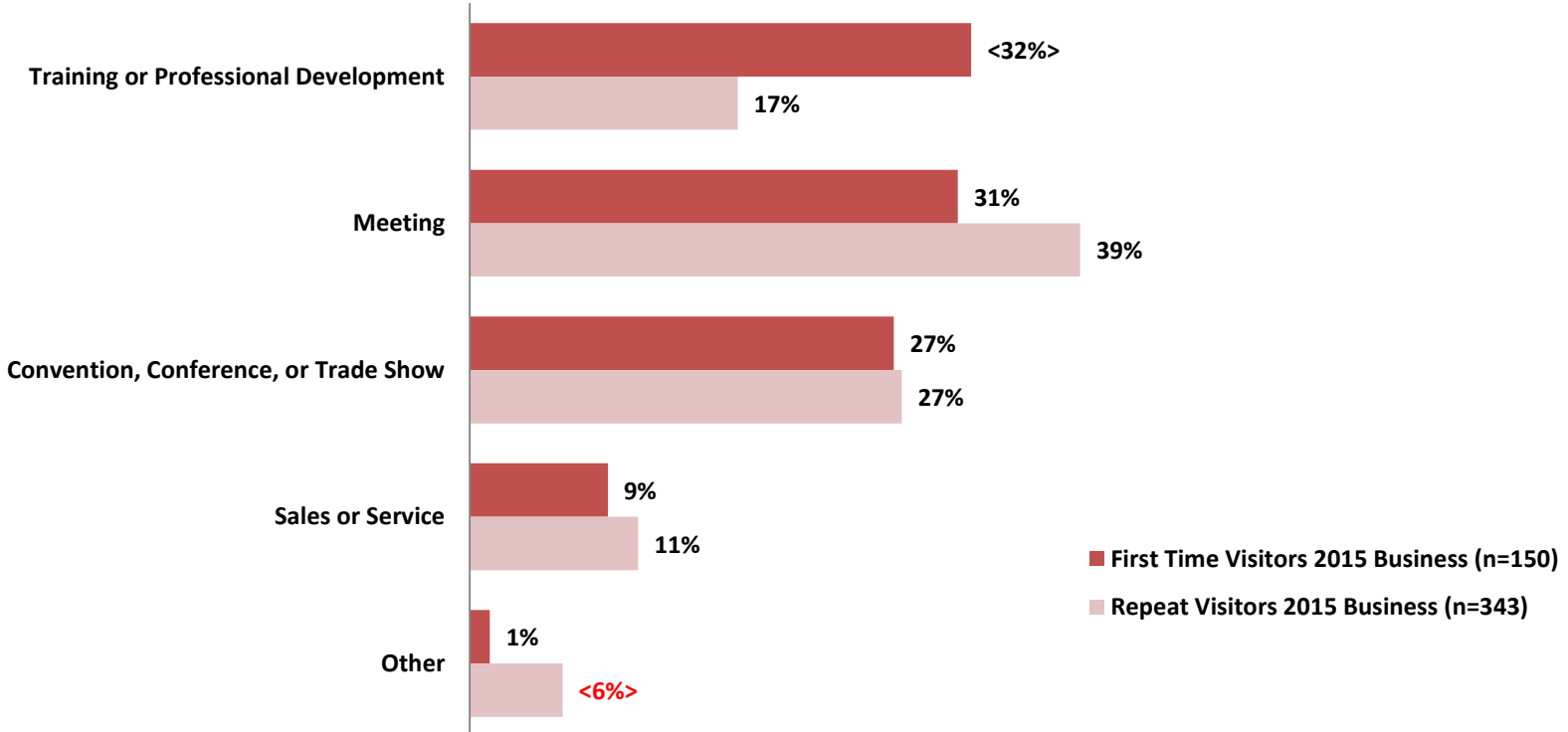
- Though a *general visit to see friends or relatives* is the most common VFR trip purpose among first-time visitors, these visitors are significantly less likely to be visiting for this reason than are repeat visitors.
- First-time visitors are more likely than repeat visitors to be in Maine for a *holiday visit*.

Primary Purpose of Overnight VFR Trips



One-third of first-time visitors who are in Maine for business are traveling for *training or professional development*, more so than are repeat visitors.

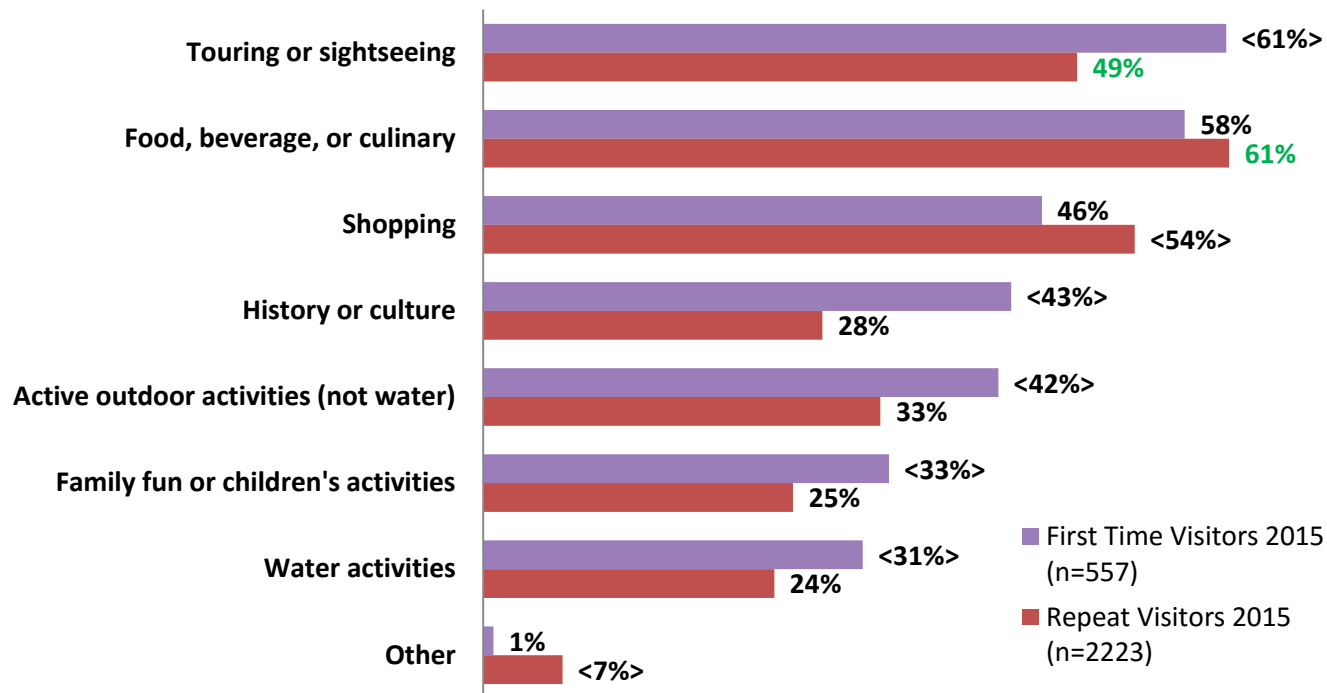
Primary Purpose of Overnight Business Trips



Touring/sightseeing is the top interest area among first-time overnight visitors to Maine, followed by food/beverage/culinary interests.

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

2015 Interest Areas

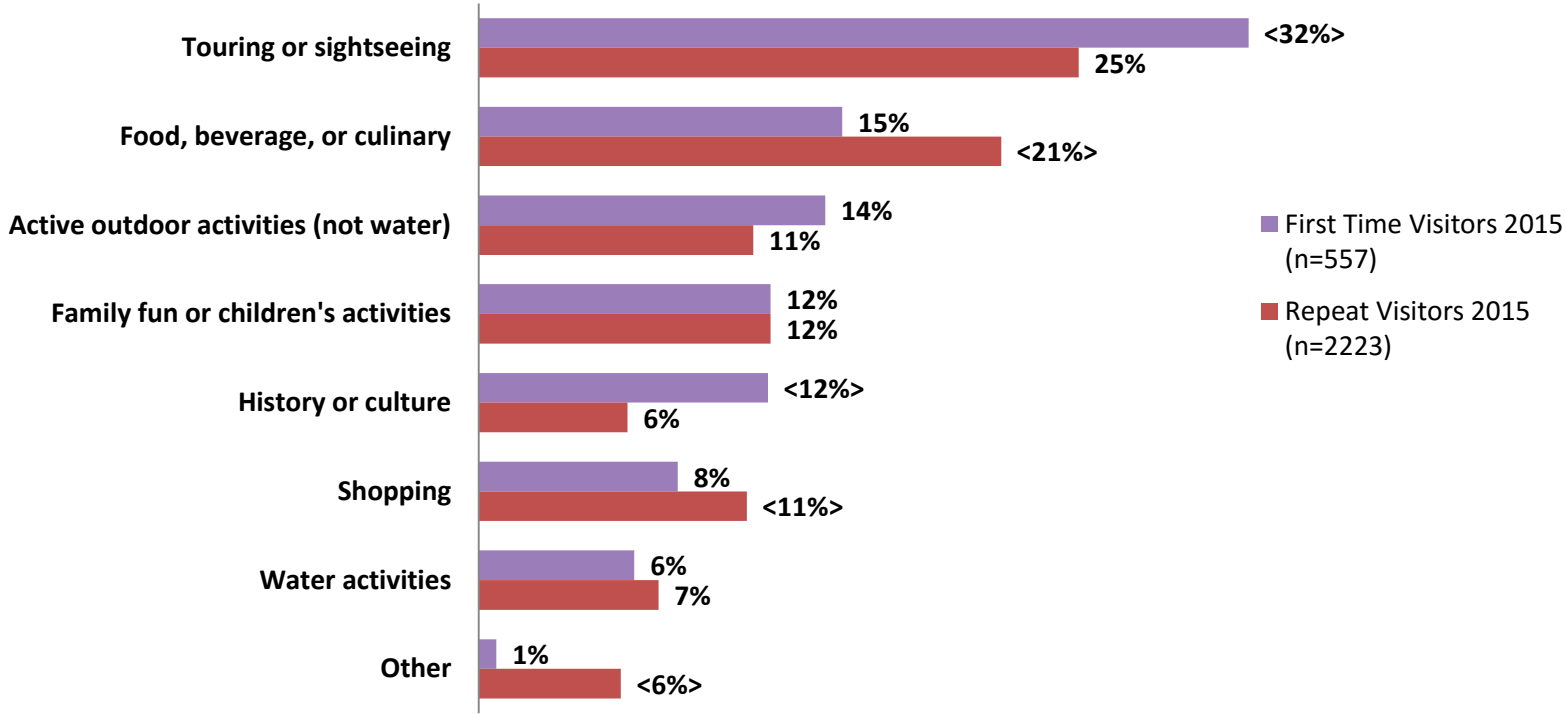


Most Important Interest Areas	
First Time Visitors	Repeat Visitors
52%	51%
26%	<35%>
18%	21%
27%	22%
34%	35%
36%	<48%>
21%	<31%>
89%	90%

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* and *history/culture* highly when considering both interest and importance. Repeat visitors are more likely to rank *food/beverage/culinary interests* and *shopping* highly than are first-time visitors.

2015 Interest Areas
Importance Index



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



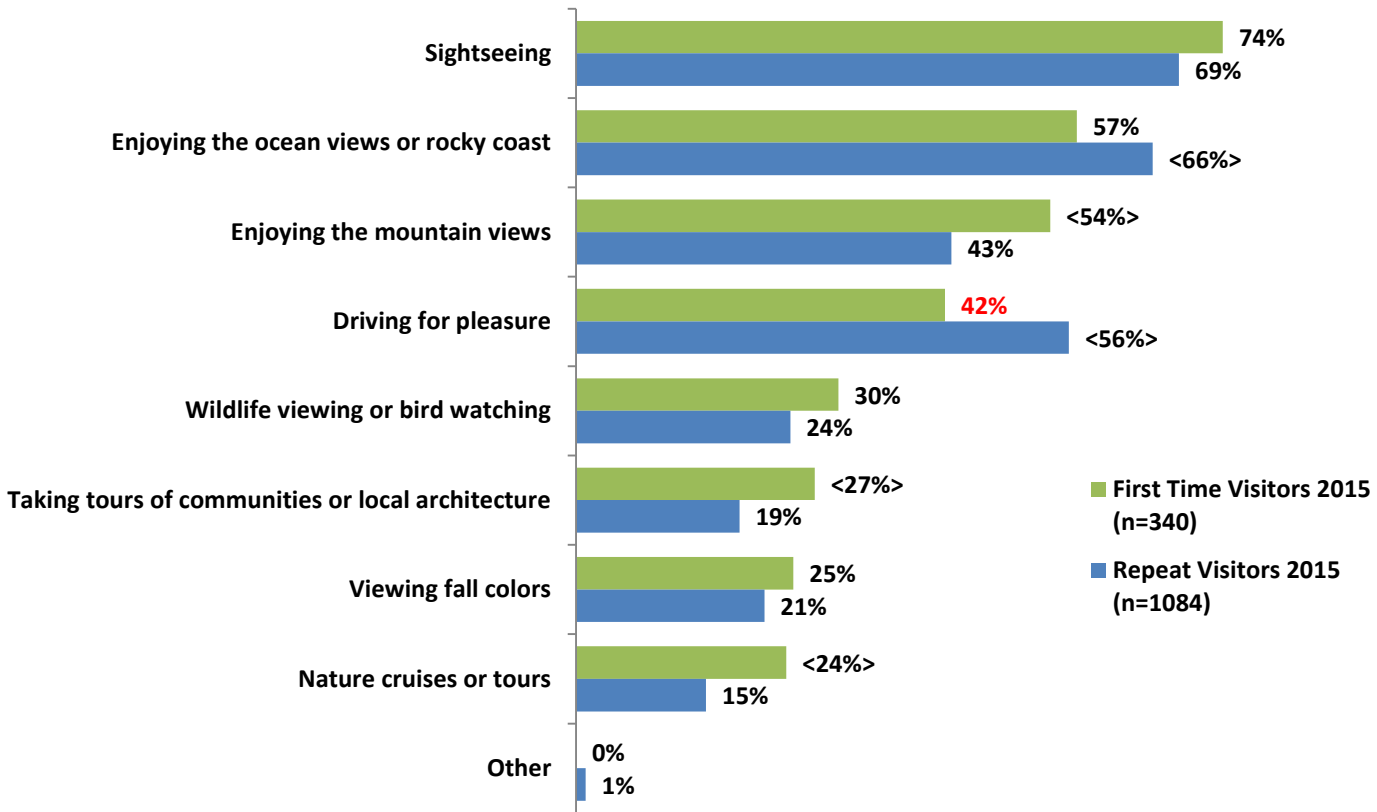
Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 19
 < > indicates a significant difference between subgroups at the 95% confidence level.

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, take nature cruises, or take tours of local communities/architecture*.
- Repeat visitors are more likely to *drive for pleasure or enjoy ocean views/the rocky coast*.

Touring or Sightseeing Activities

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

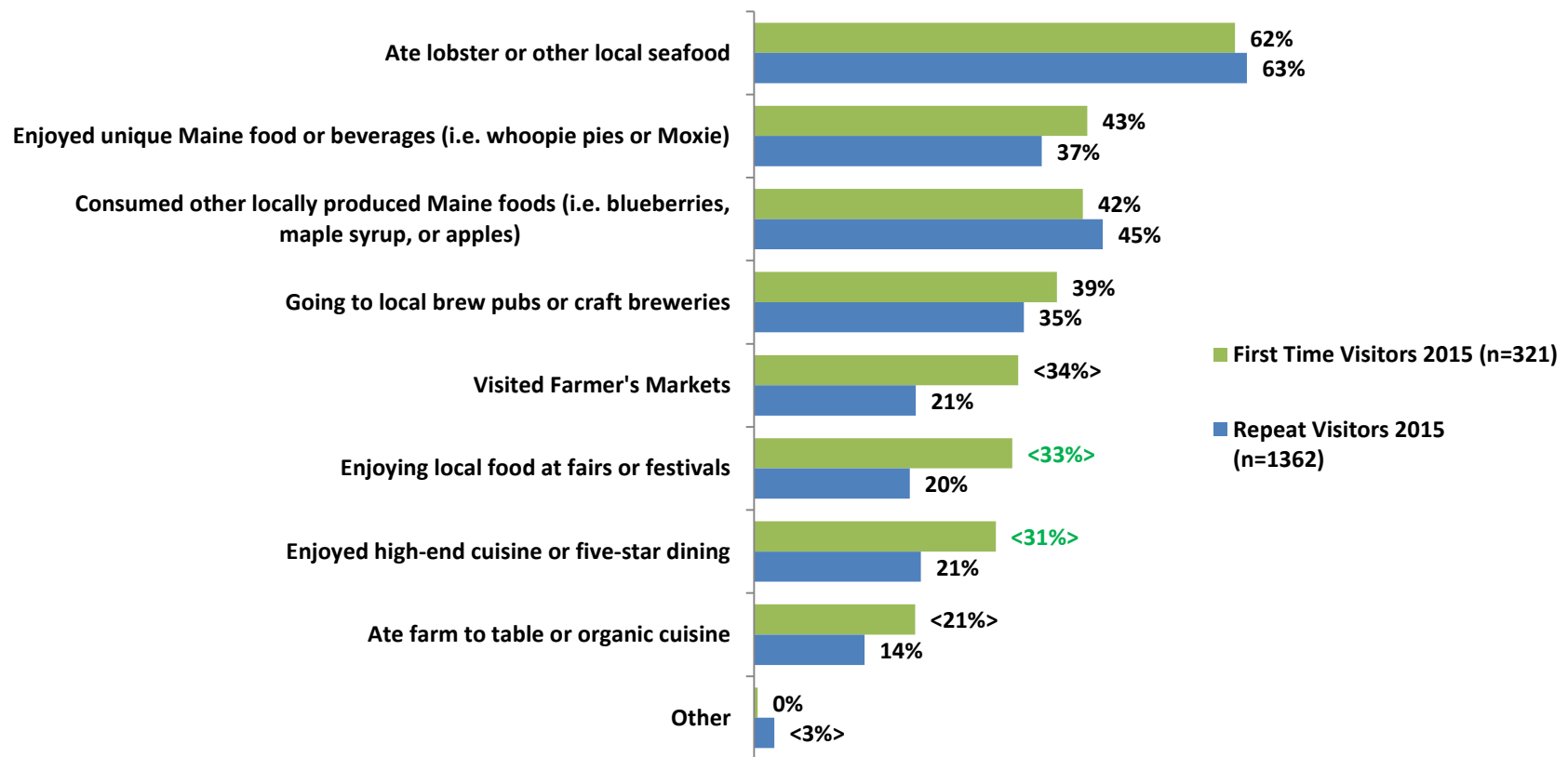


The most common food/beverage/culinary activity pursued by first-time visitors is *eating lobster or other local seafood*.

- First-time visitors interested in food/beverage/culinary activities are more likely than repeat visitors to report that they *enjoyed high-end cuisine or five-star dining, enjoyed local food at fairs or festivals, visited farmer's markets, or ate farm to table/organic cuisine* while visiting Maine.

Food, Beverage, or Culinary Activities

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

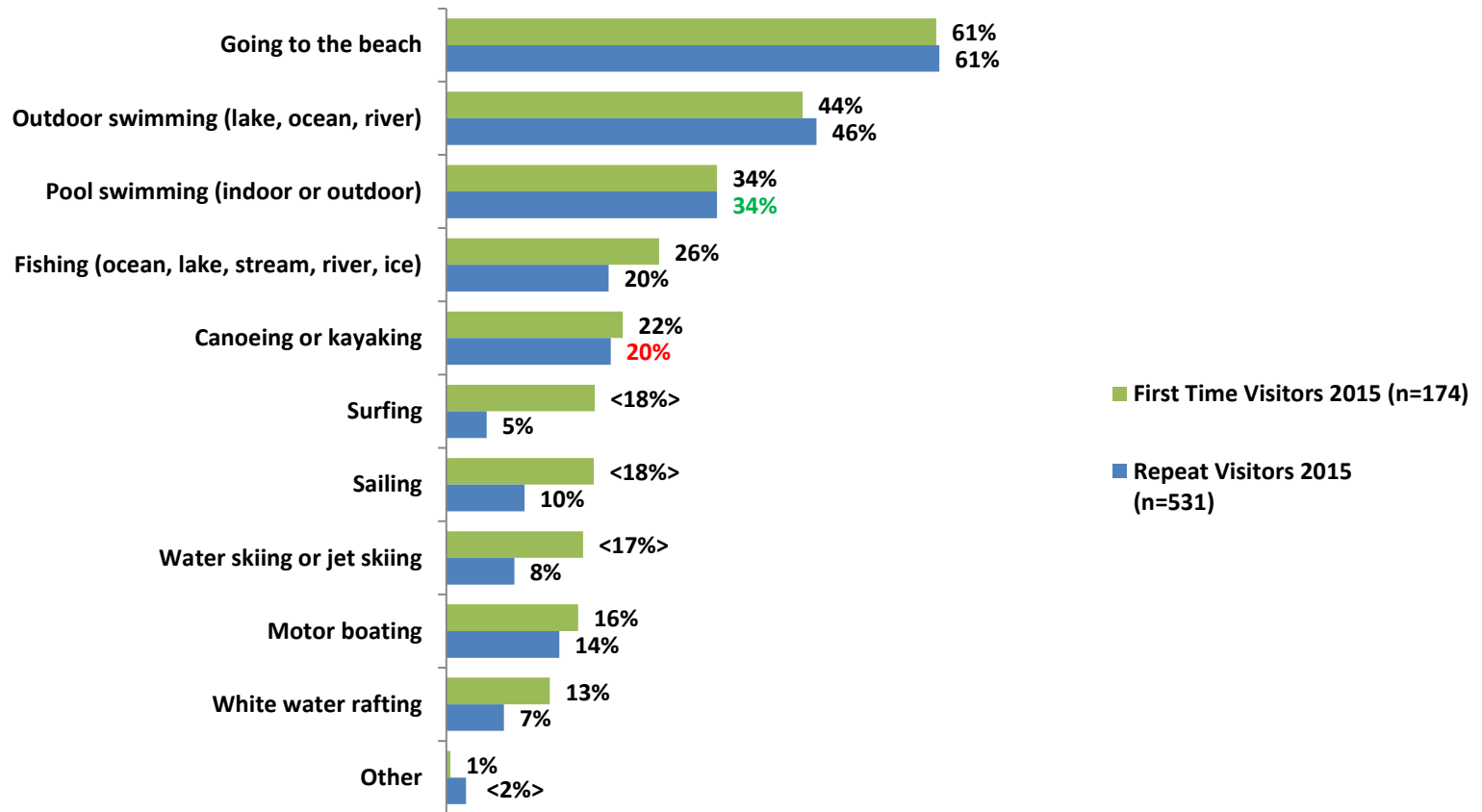


Going to the beach is the top activity among both first-time and repeat visitors who are interested in water activities.

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

Water Activities

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

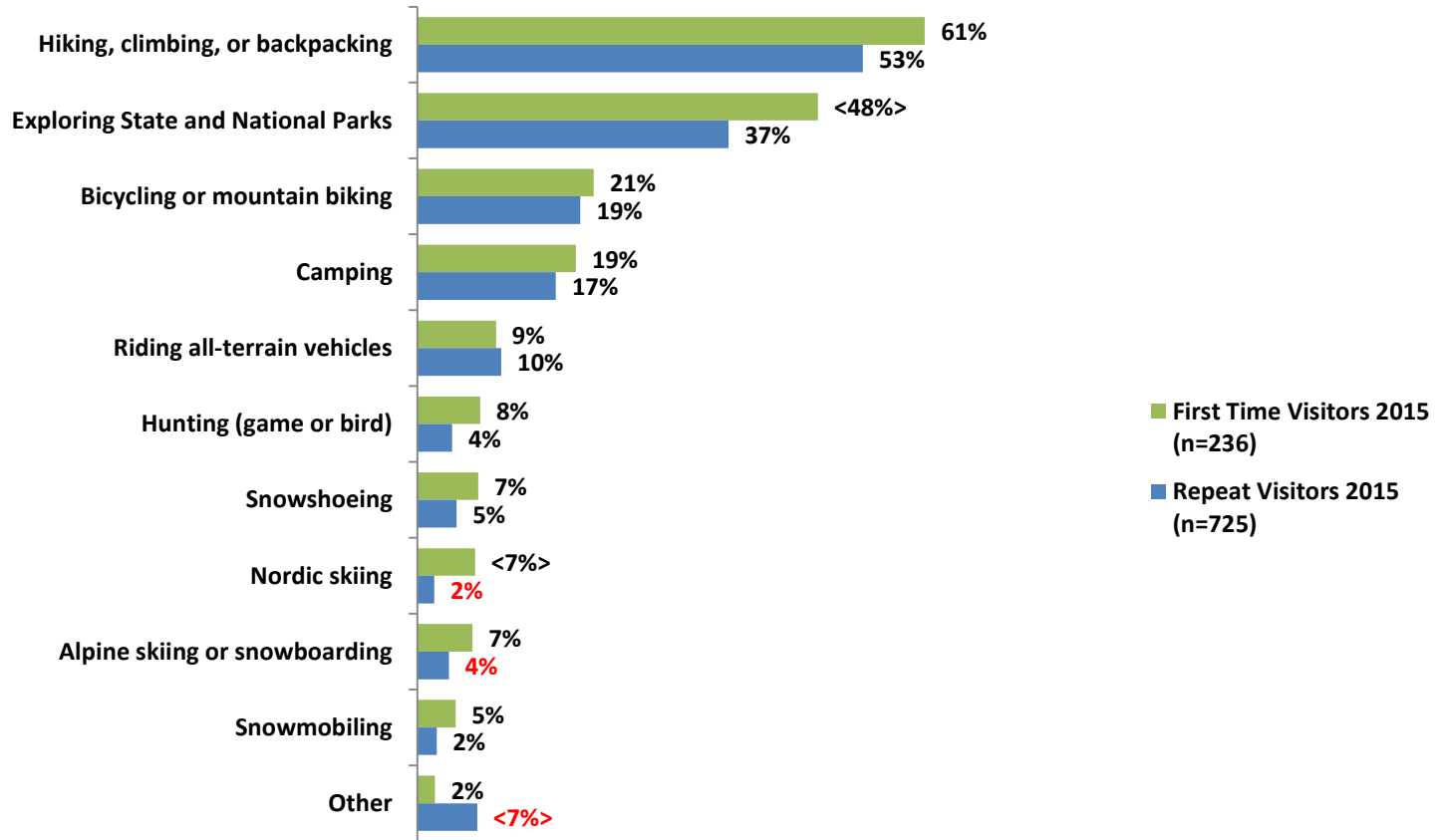


Hiking/climbing/backpacking is the most prevalent active outdoor interest participated in by first-time and repeat visitors alike.

- Exploring State and National Parks and Nordic skiing 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

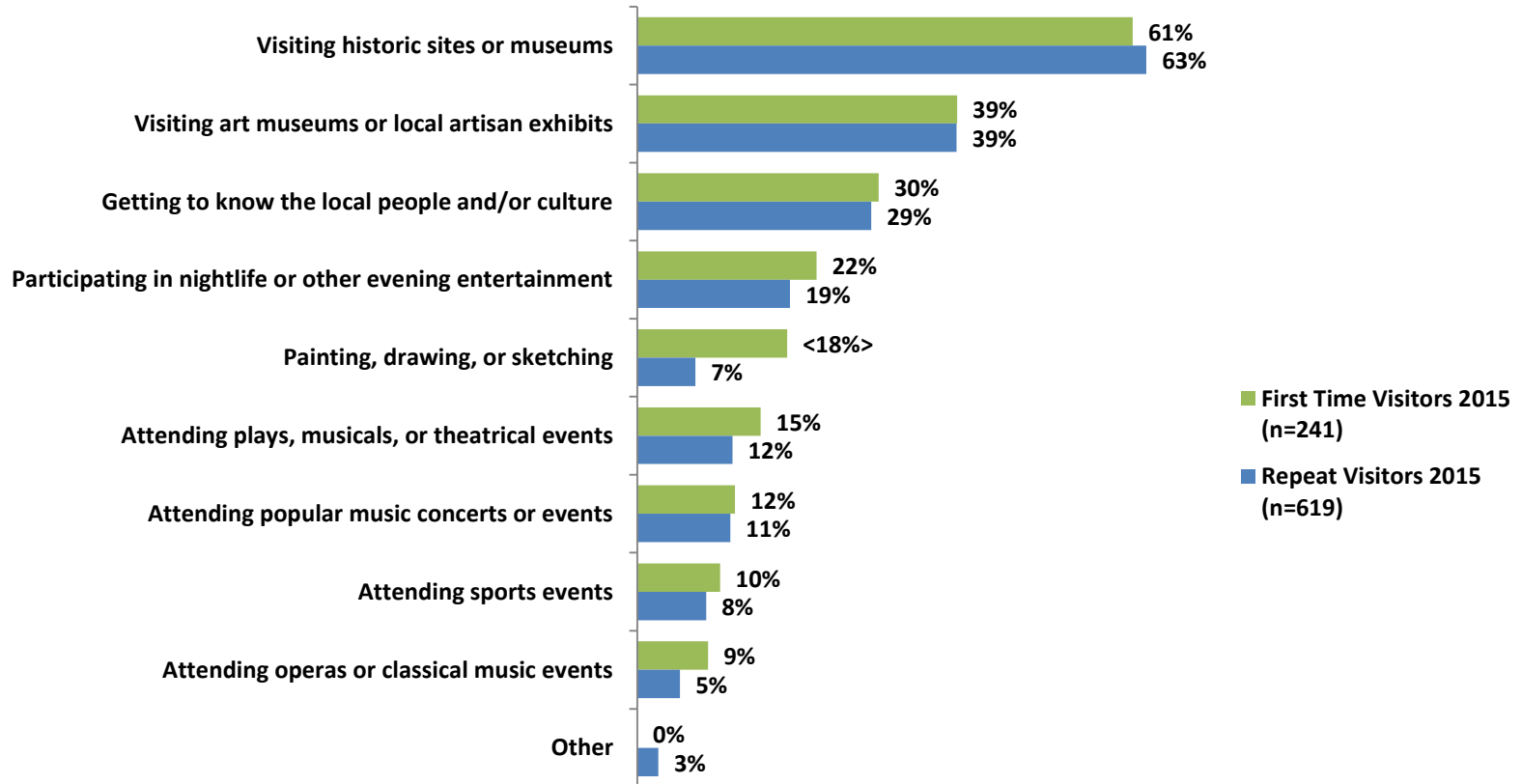


Nearly two-thirds of first-time visitors interested in history or culture spent time *visiting historic sites/museums* while in Maine.

- *Painting/drawing/sketching* was more popular among first-time visitors as compared to repeat visitors.

History or Culture Activities

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

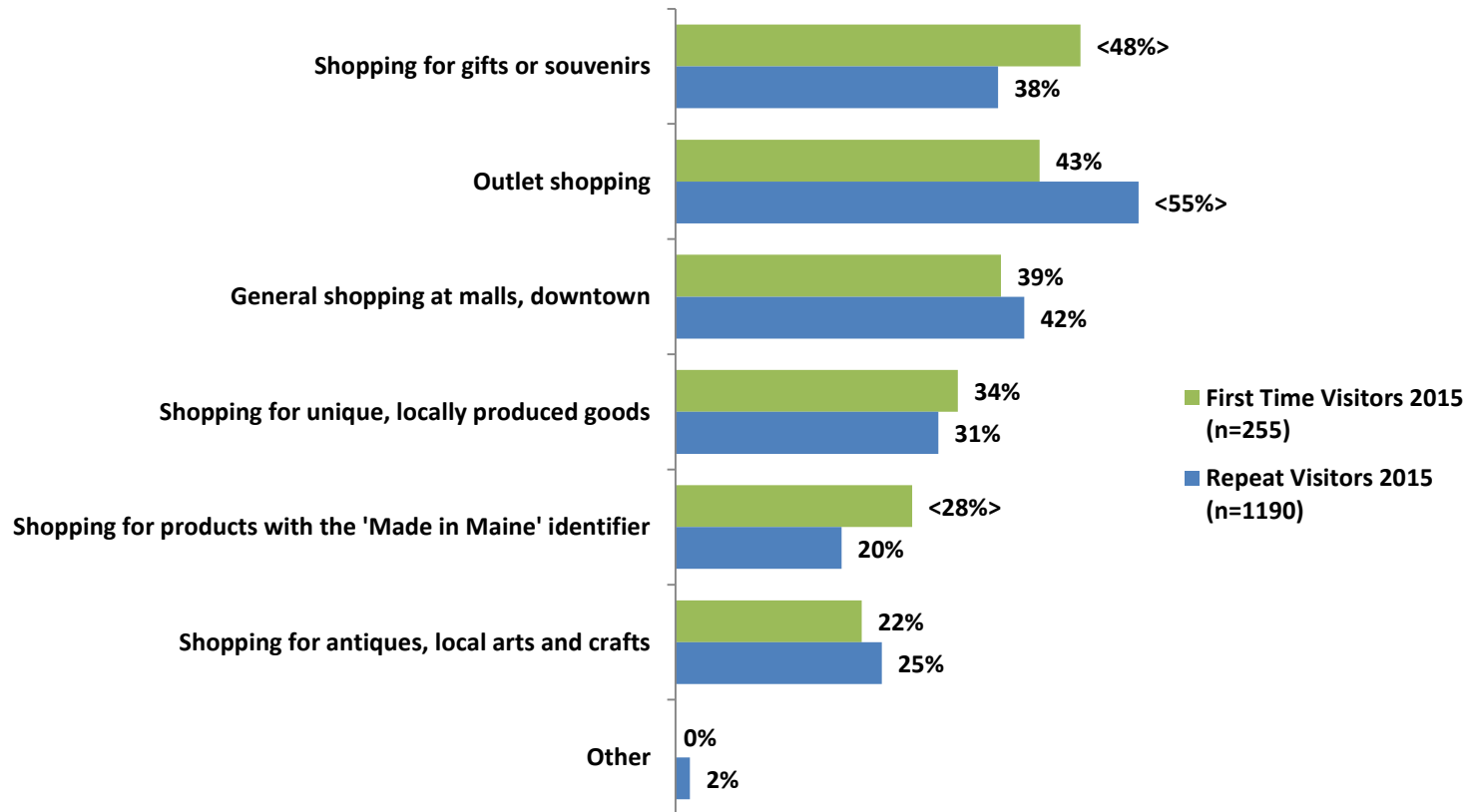


Shopping for gifts/souvenirs and outlet shopping are the most popular shopping activities among first-time visitors.

- While repeat visitors are more likely than first-time visitors to *shop at the outlets*, first-time visitors are more likely to be *shopping for gifts and souvenirs* or *products with the 'Made in Maine' identifier*.

Shopping Activities

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

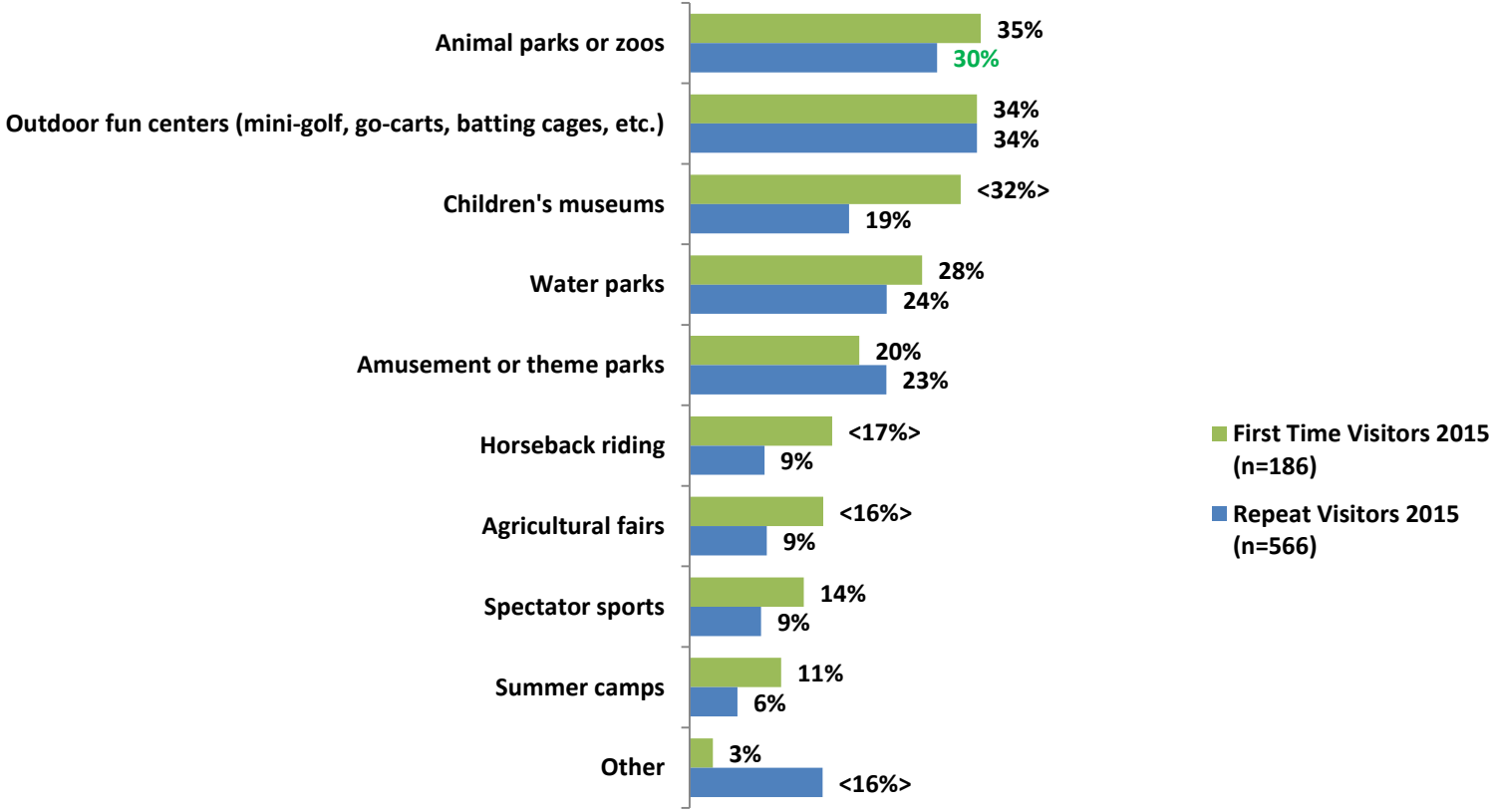


First-time visitors who are interested in family fun/children’s activities participated in a wide variety of these activities while in Maine.

- Children’s museums, agricultural fairs, and horseback riding are all more popular among first-time visitors as compared to repeat visitors.

Family Fun/Children’s Activities

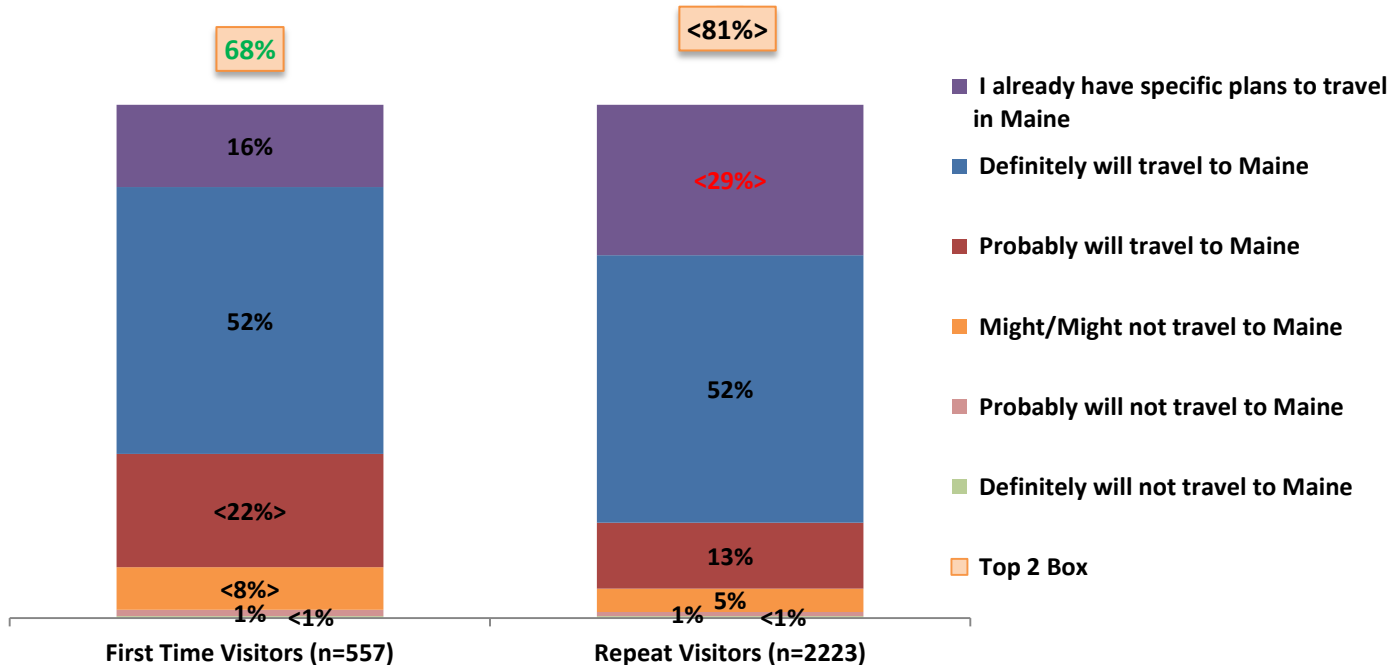
Base: Those who report family fun/children’s activities as an interest area for this Maine trip



Two-thirds of Maine’s first-time visitors intend to visit Maine again in the next two years, a greater proportion than among last year’s first-time visitors.

- 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

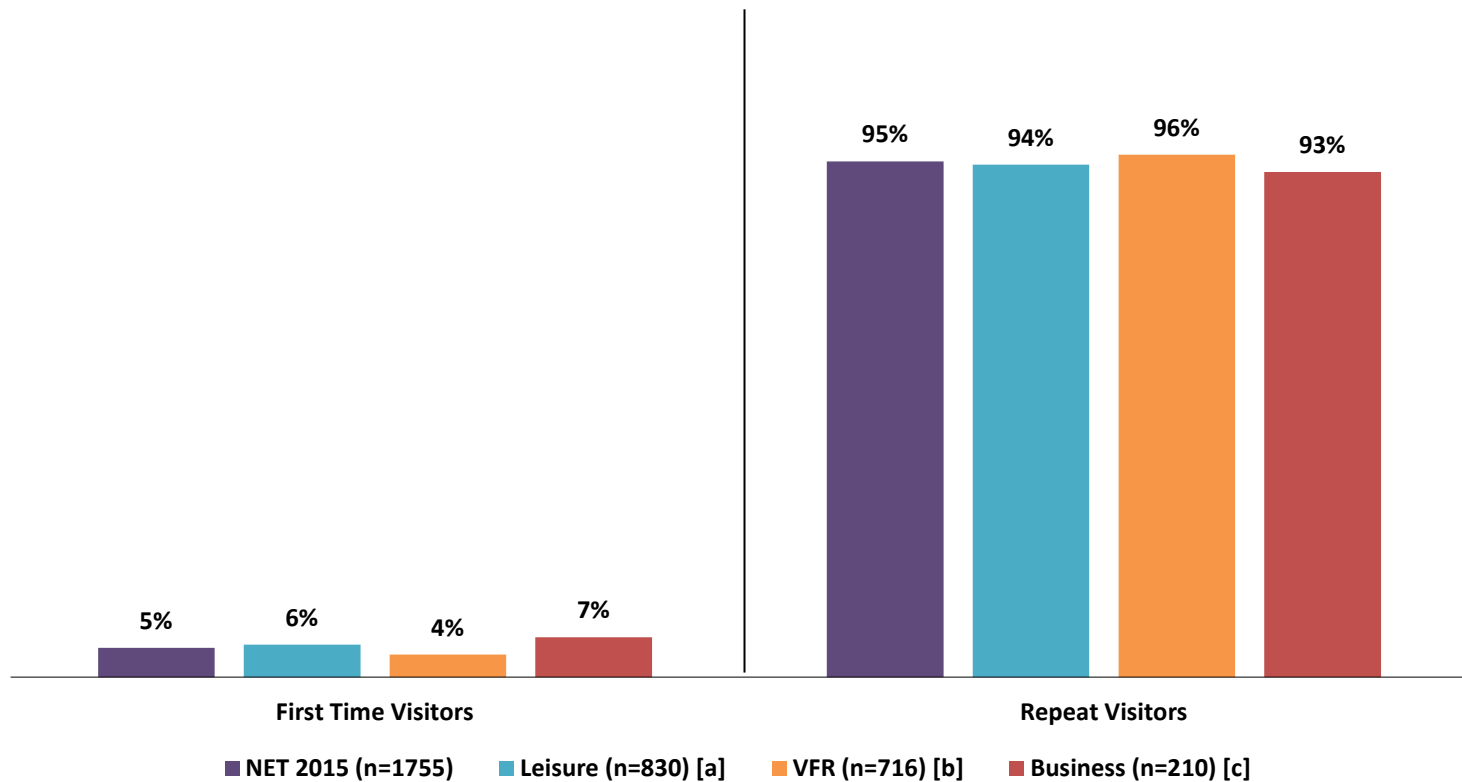


First-Time Day Visitors: *Traveler Description*

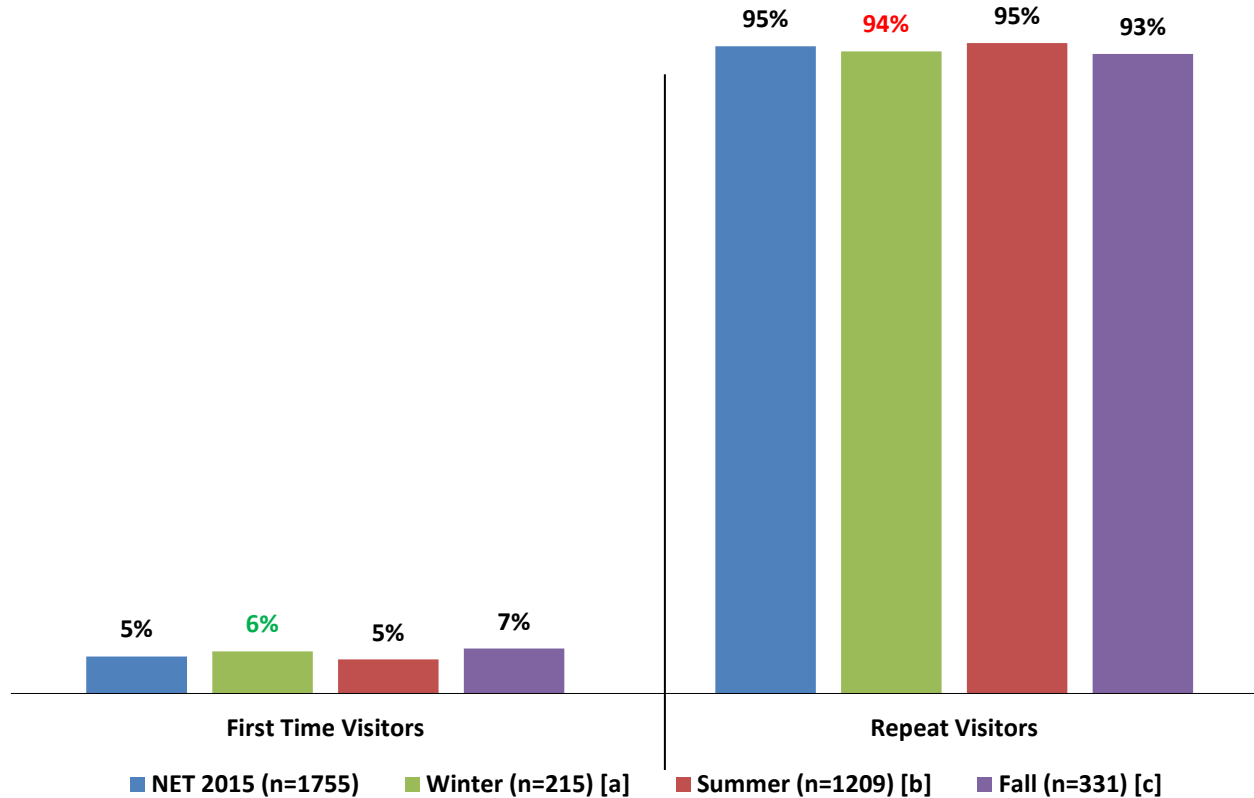


In 2015, only five percent of Maine's day visitors were visiting Maine for the first time.

- 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.



The proportion of first-time day visitors to Maine is consistent throughout the year.



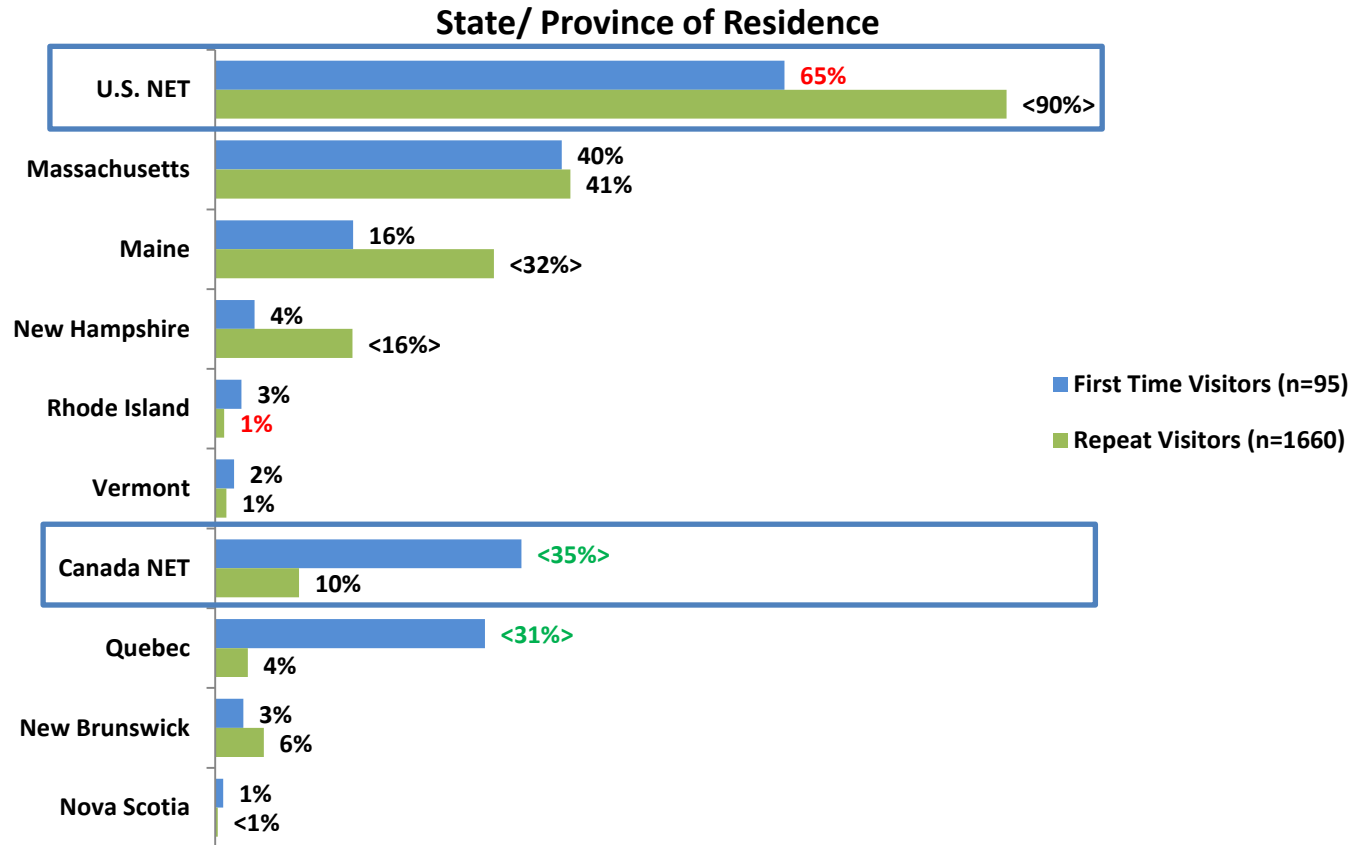
Day Visitor Demographics

- First-time day visitors are 36 years old, on average, and earn household incomes around \$89,000. Two-thirds are employed full-time, and 61% have at least a college degree.
- Similar to overnight visitors, first-time day visitors trend younger than repeat visitors and are more likely to be employed full time.

2015 Day Visitors	First Time Visitors (n=95)	Repeat Visitors (n=1660)
Age:		
< 35	<54%>	23%
35 - 44	23%	16%
45 - 54	14%	21%
55 +	9%	<40%>
Mean Age (Years)	36.2	<48.6>
Income:		
< \$50,000	24%	22%
\$50,000 - \$99,000	46%	43%
\$100,000 +	29%	36%
Mean Income (Thousands)	\$89,220	\$93,240
Female	56%	63%
College Degree or Higher	61%	69%
Married	58%	60%
Employed Full Time	<68%>	54%

Two in three first-time day visitors are US residents, a significantly lower proportion than among repeat visitors.

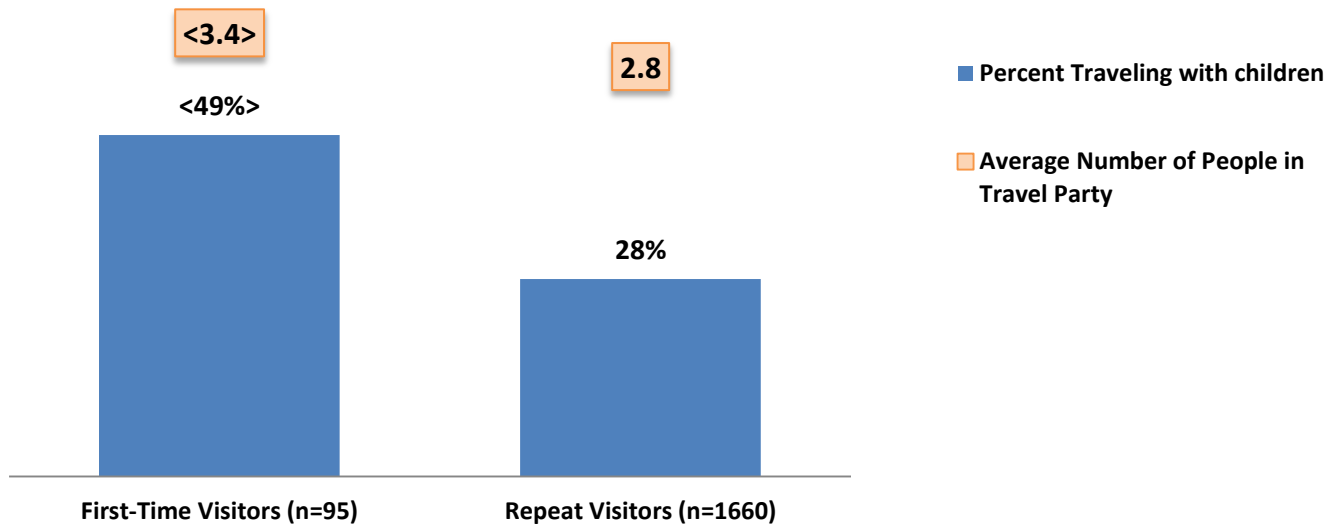
- Day visitors arriving from Quebec are more likely to be visiting Maine for the first time, while those traveling from Maine or New Hampshire are more likely to be repeat visitors.
- In 2015, Maine attracted a lesser proportion of first-time visitors from the U.S. and a greater proportion of first-time visitors from Canada, as compared to 2014.



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

- First time day visitors to Maine are more likely to be traveling with children than are repeat visitors.

Travel Party Composition

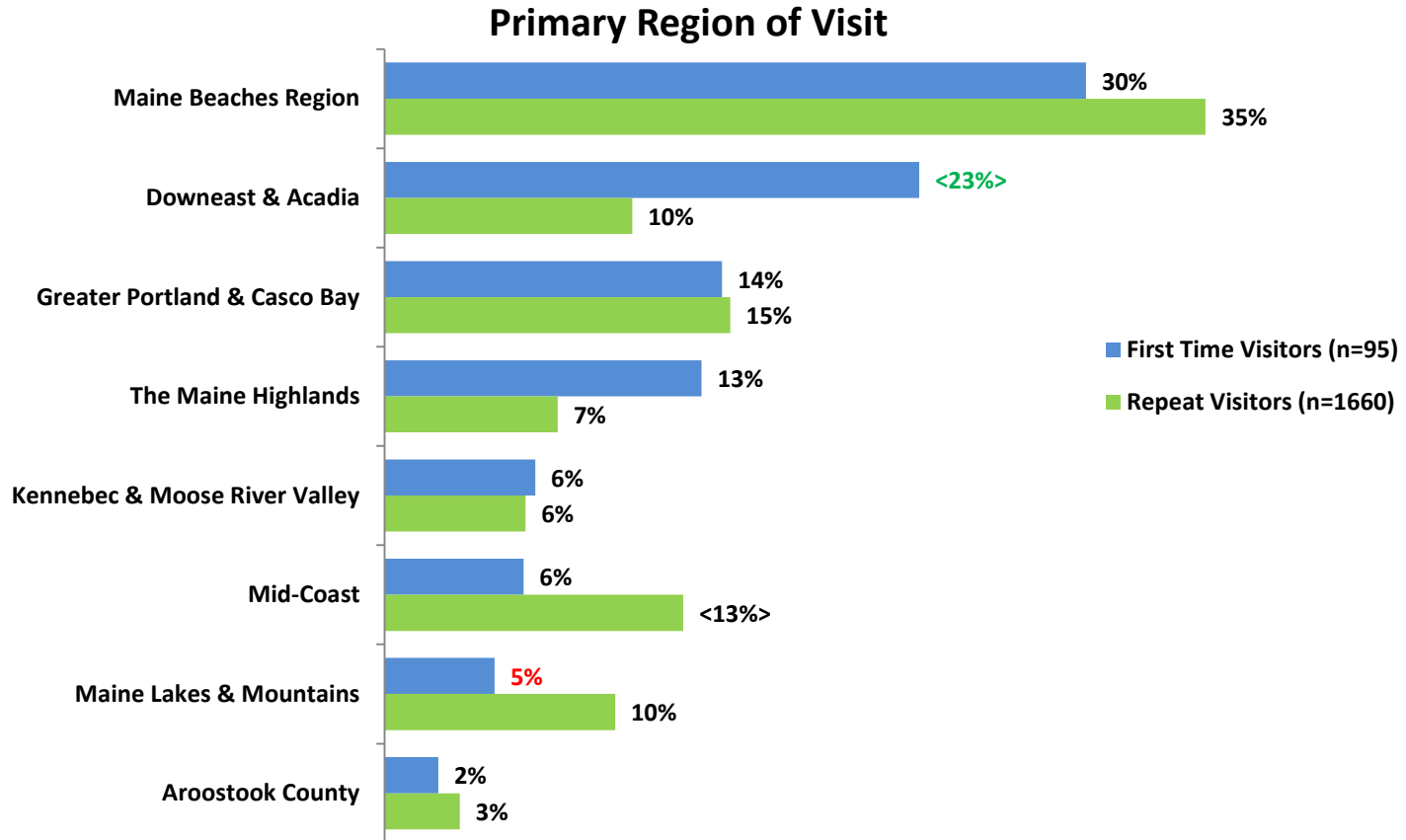


First-Time Day Visitors: *Trip Experience*



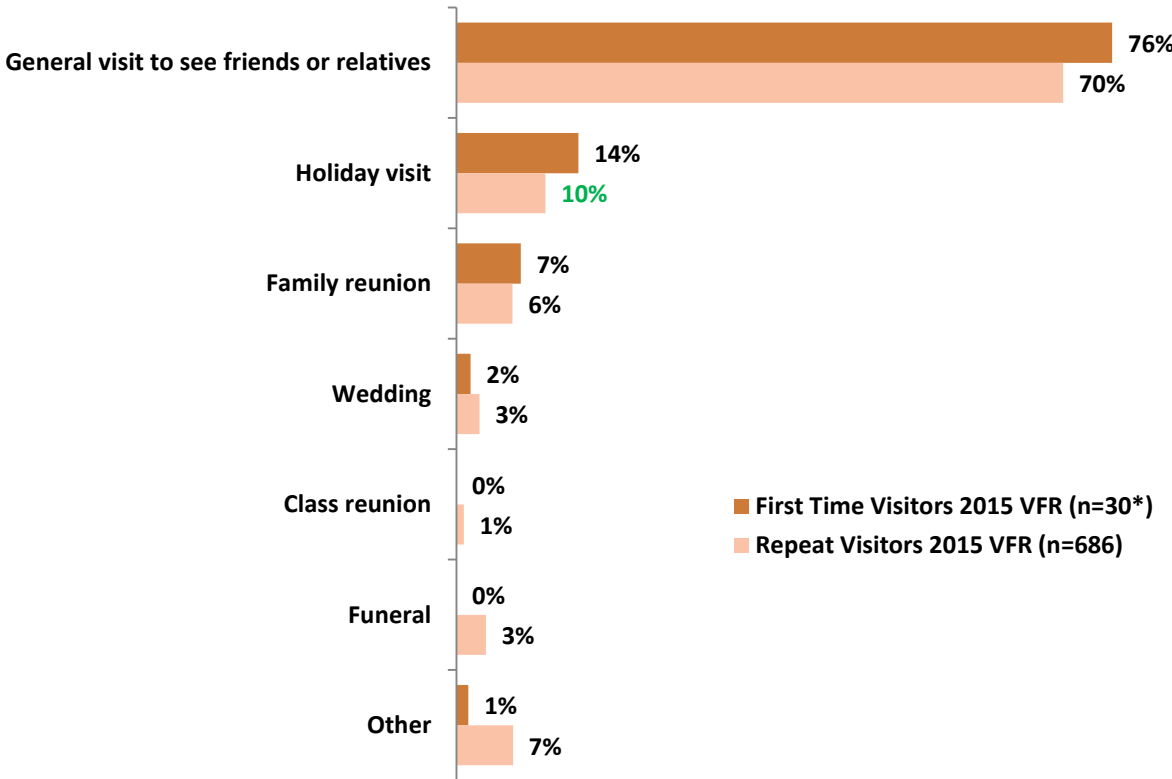
The Maine Beaches region is the primary destination for both first-time and repeat day visitors.

- First-time day visitors are more apt to be drawn to the Downeast & Acadia region than are repeat day visitors, while the Mid-Coast region is more popular among repeat visitors.



Three in four first-time day visitors on a VFR trip are on a general visit to see friends or relatives.

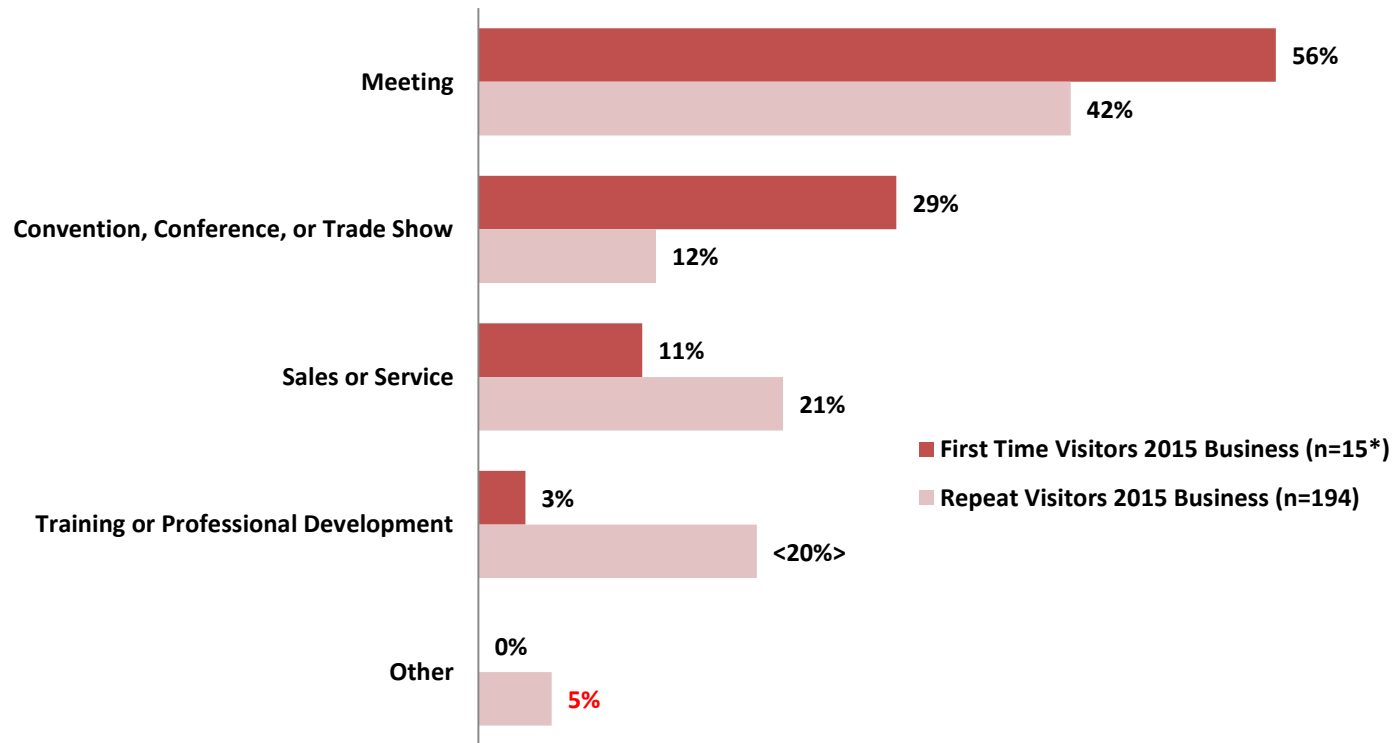
Primary Purpose of Day VFR Trips



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 *meeting*.

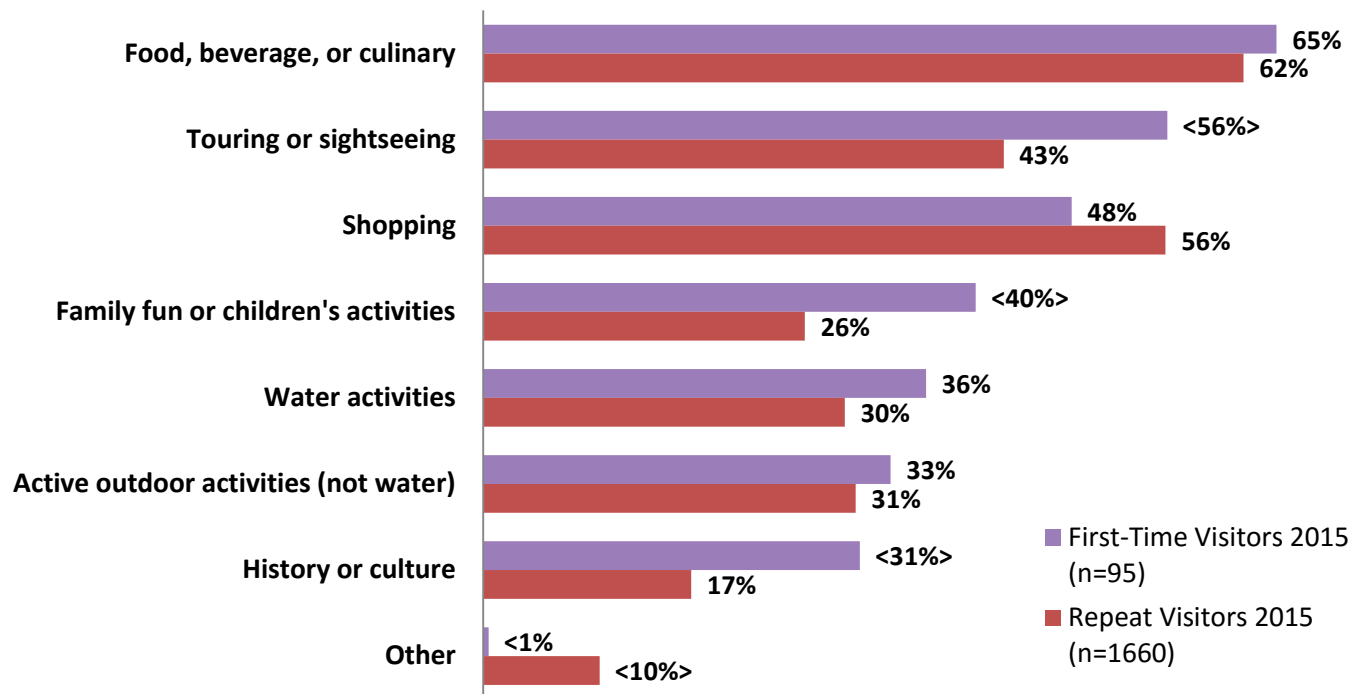
Primary Purpose of Day Business Trips



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

- Touring/sightseeing, family fun/children's activities, and history/culture activities are all more popular with first-time day visitors than repeat day visitors.

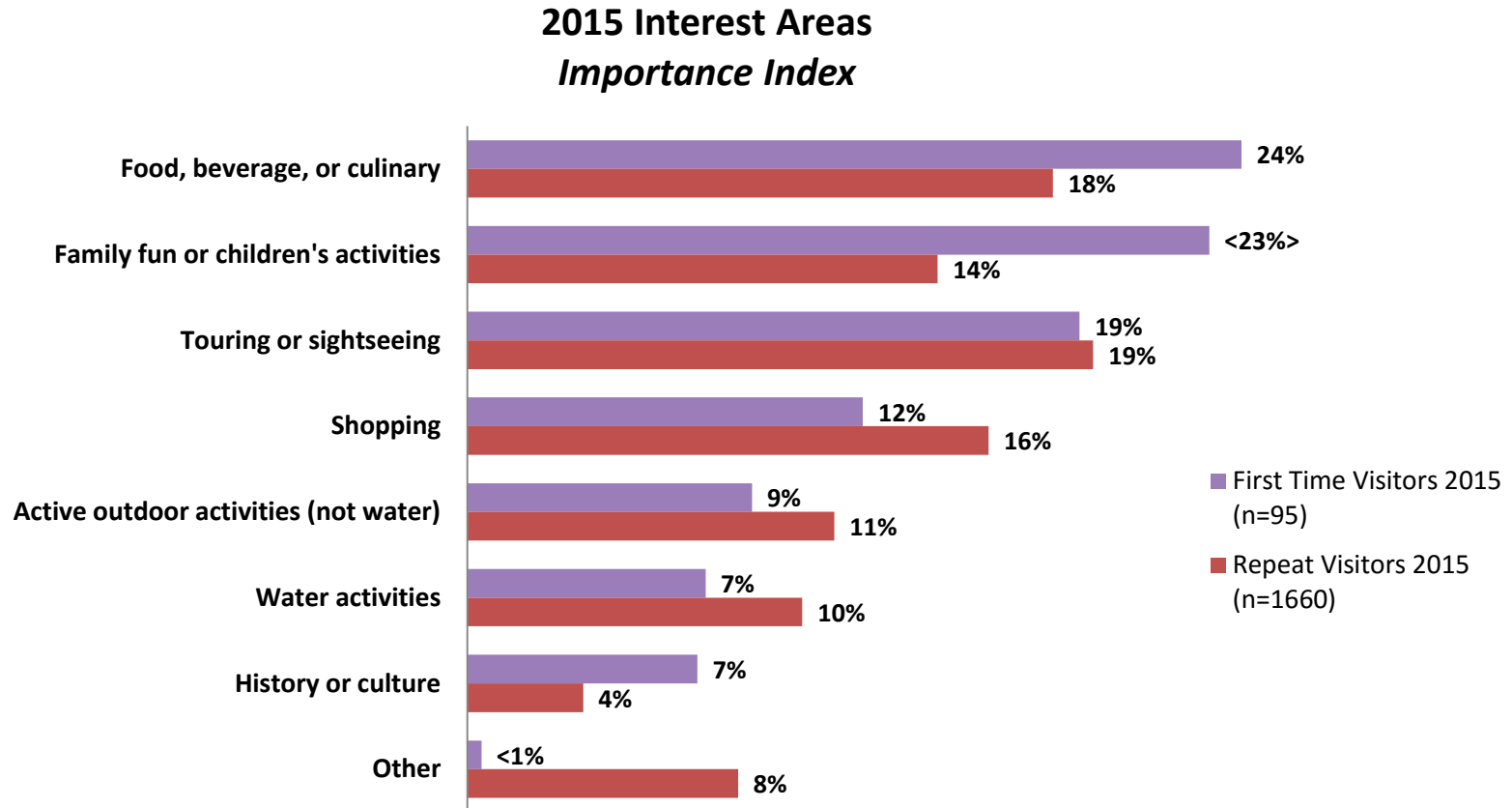
2015 Interest Areas



Most Important Interest Areas	
First Time Visitors	Repeat Visitors
36%	28%
33%	44%
25%	28%
56%	54%
20%	34%
26%	36%
23%	21%
<100%>	86%

When analyzing both interest and importance, *food/beverage/culinary* interests and *family fun/children's activities* rank highest among first-time visitors.

- First-time visitors are more likely than repeat visitors to rank *family fun/ children's activities* as a high priority when considering both interest and importance.

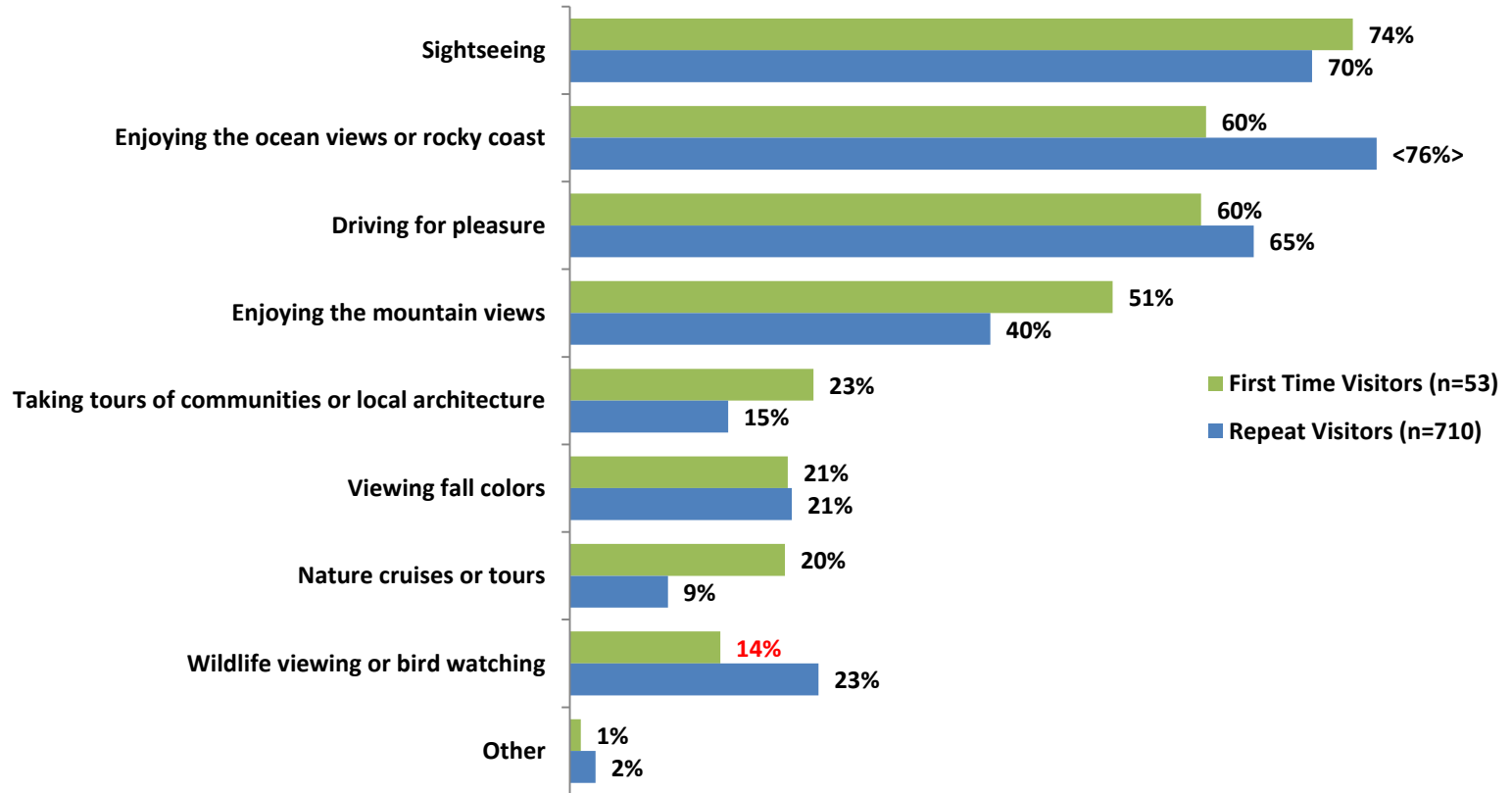


Importance Index = percentage selecting category as interest area X percentage listing same interest area as most important

Sightseeing, enjoying the ocean views or rocky coast, and driving for pleasure 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

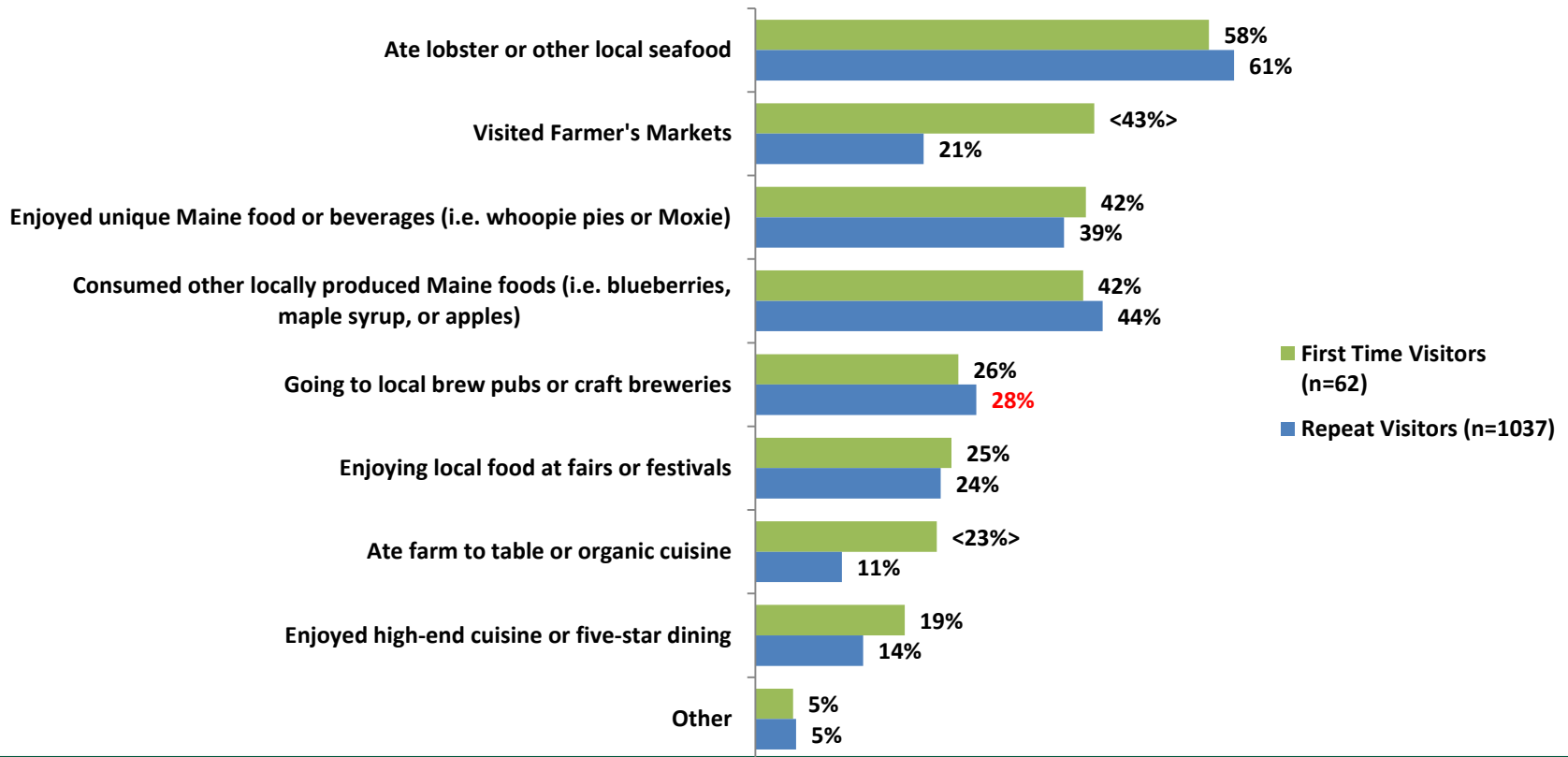


Eating lobster or other local seafood is the top food/beverage/culinary activity among first-time day visitors to Maine.

- First-time day visitors interested in food/beverage/culinary activities are more likely than repeat visitors to have *visited Farmer's Markets* or *eaten farm to table/organic cuisine*.

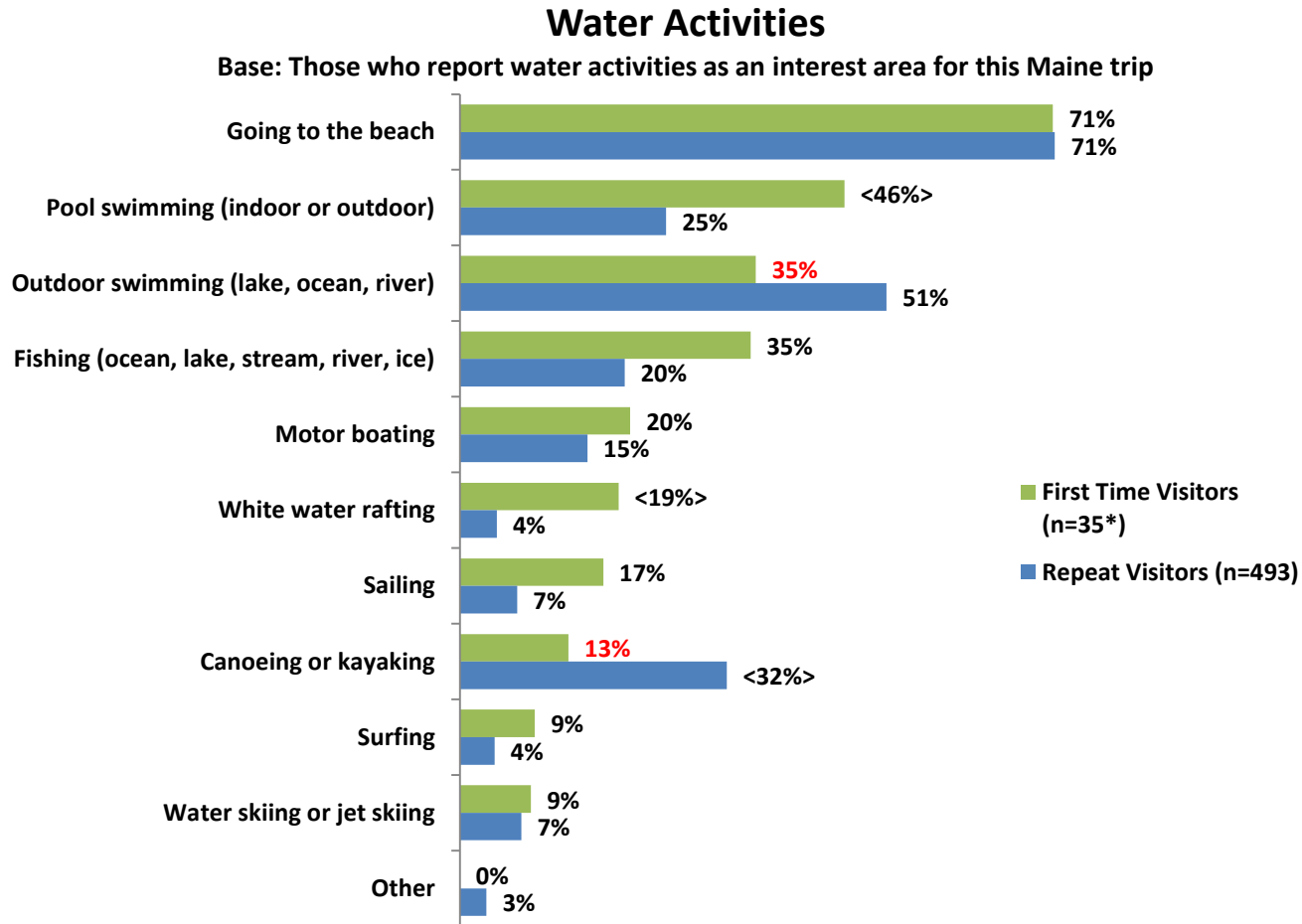
Food, Beverage, or Culinary Activities

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



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

- First-time visitors are more likely to be interested in *pool swimming* and *white water rafting* than are repeat day visitors. Repeat visitors are more likely to be interested in *canoeing/kayaking*

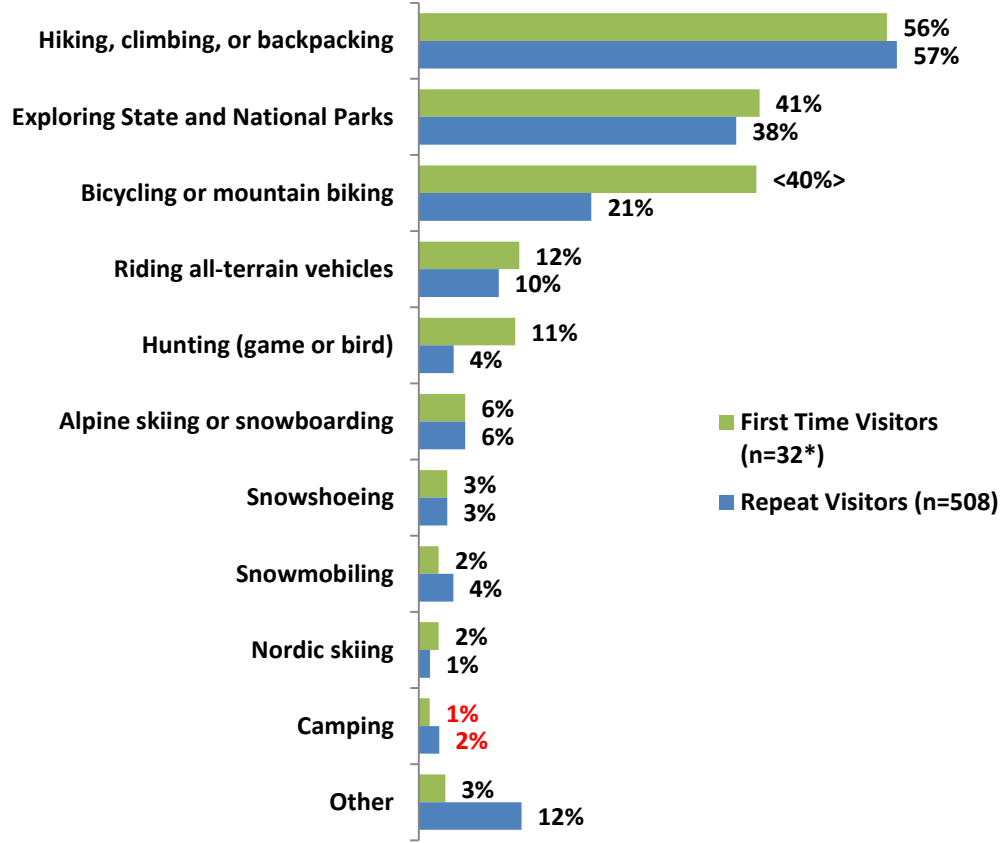


More than half of first-time day visitors interested in active outdoor activities did some *hiking/climbing/backpacking* while in Maine.

- First-time visitors are more likely than repeat visitors to have done some *bicycling or mountain biking* while visiting Maine.

Active Outdoor Activities – Non-Water

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

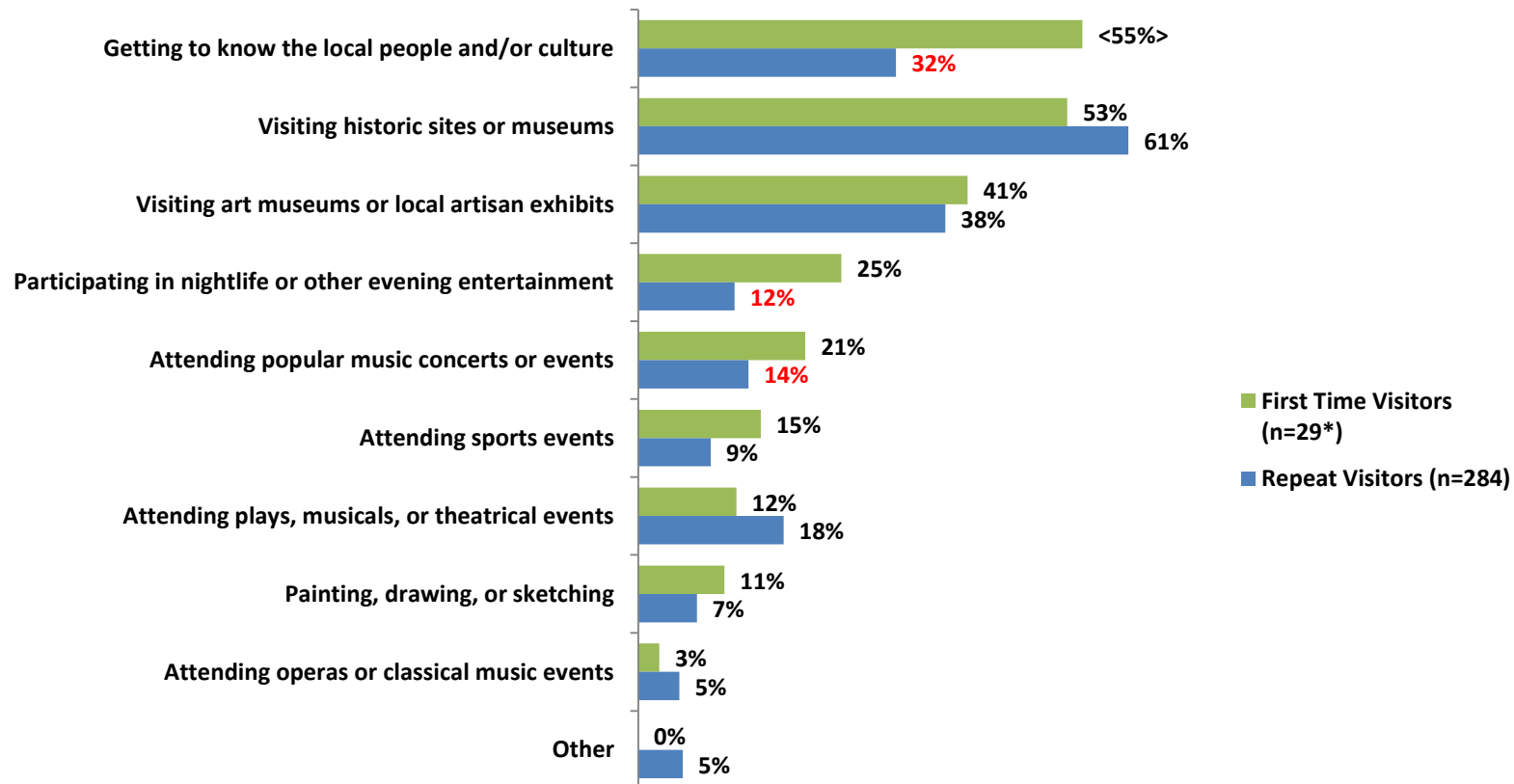


Getting to know the local people and visiting historic sites/museums are the most popular history/culture activities among first-time day visitors.

- First-time visitors are more likely than repeat visitors to be interested in *getting to know the local people and/or culture*.

History or Culture Activities

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

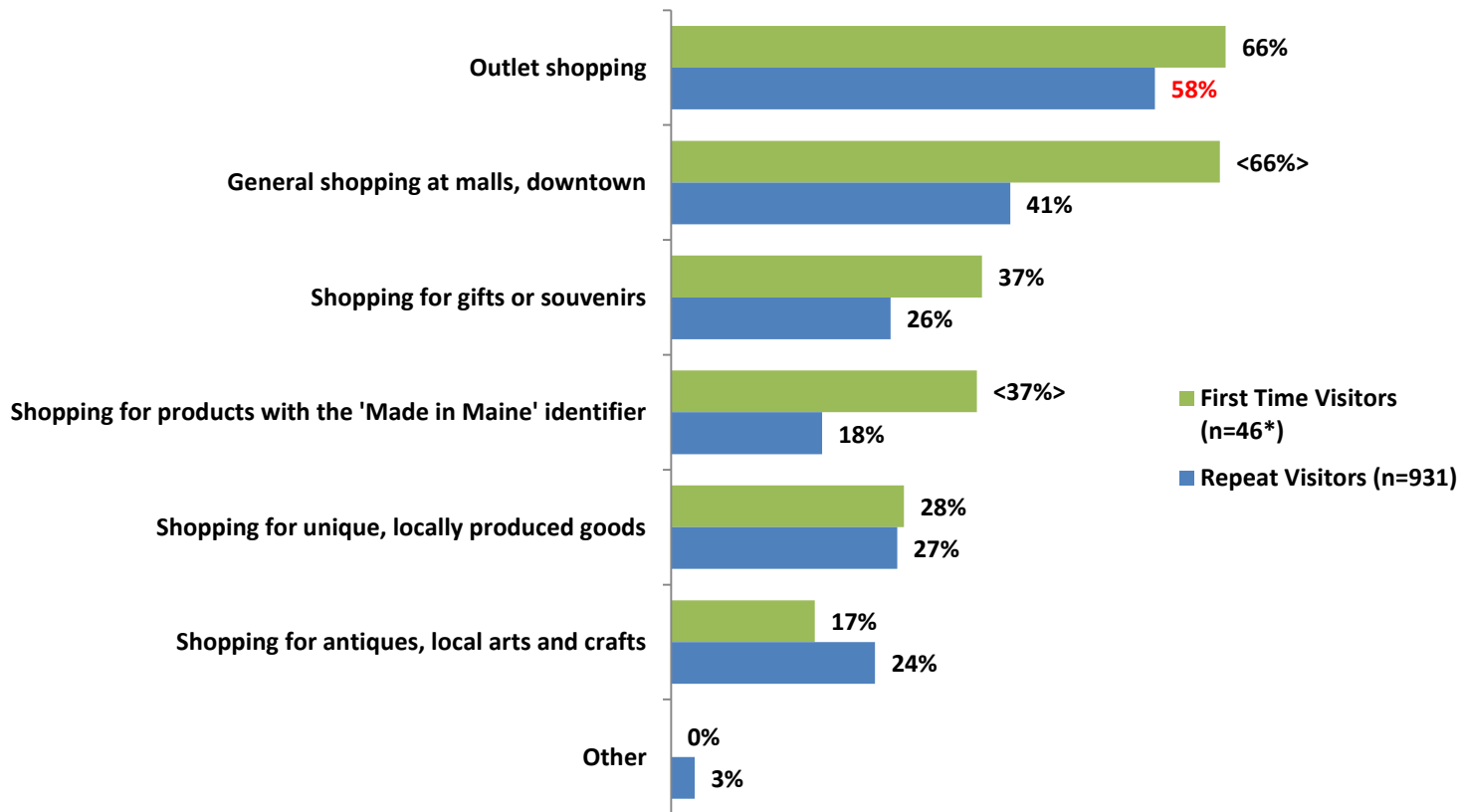


Among first-time day visitors interested in shopping, two-thirds either shop at the *outlets* or at *malls/downtown*.

- General shopping at malls/downtown and shopping for products with the 'Made in Maine' identifier are more common among first-time day visitors than among those who have visited Maine before.

Shopping Activities

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

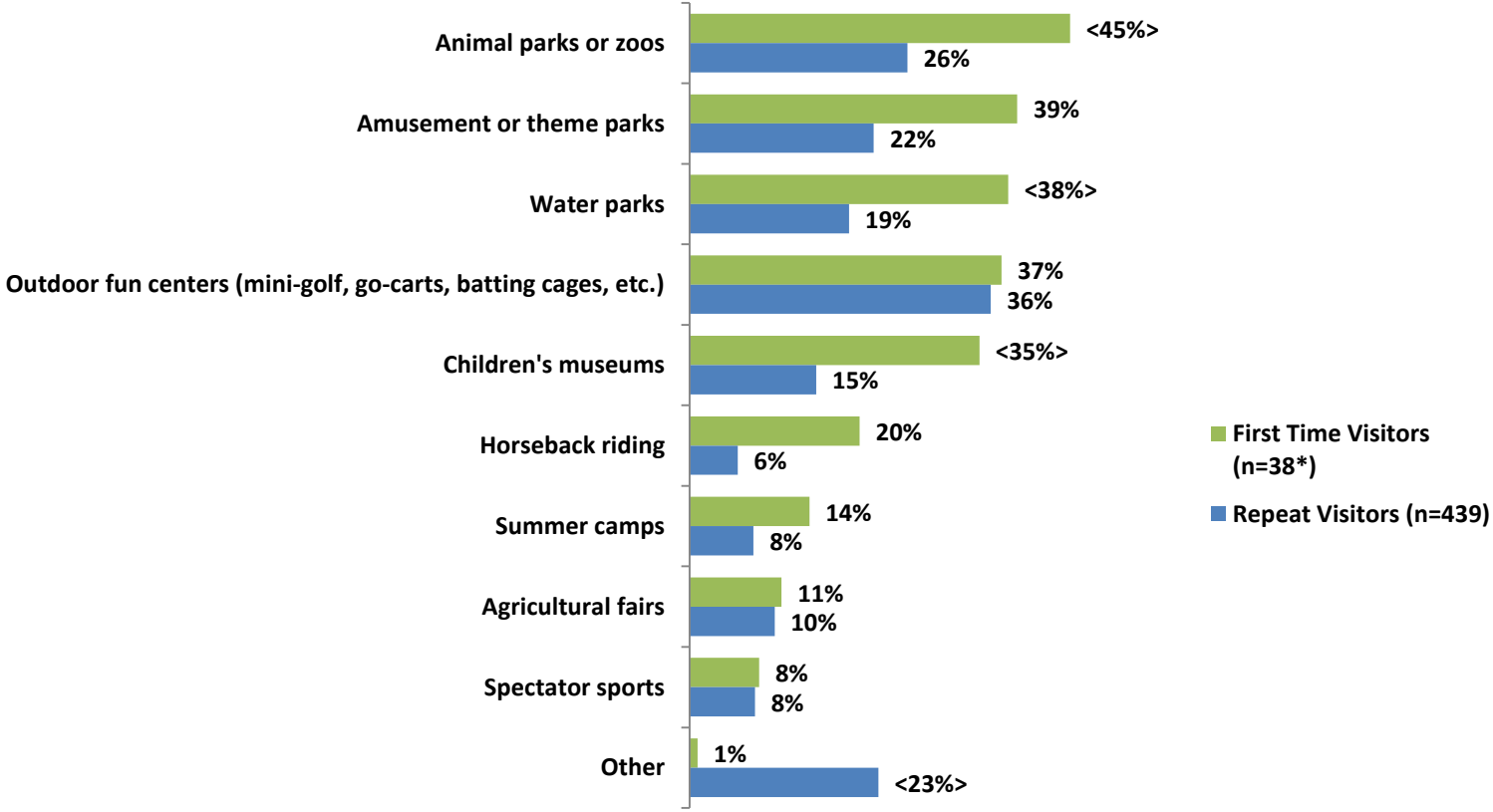


Visiting animal parks/zoos is the most popular family fun/children’s activity among first-time visitors to Maine.

- Animal parks/zoos, water parks, and children’s museums are all more popular among first-time visitors to Maine than among repeat visitors.

Family Fun/Children’s Activities

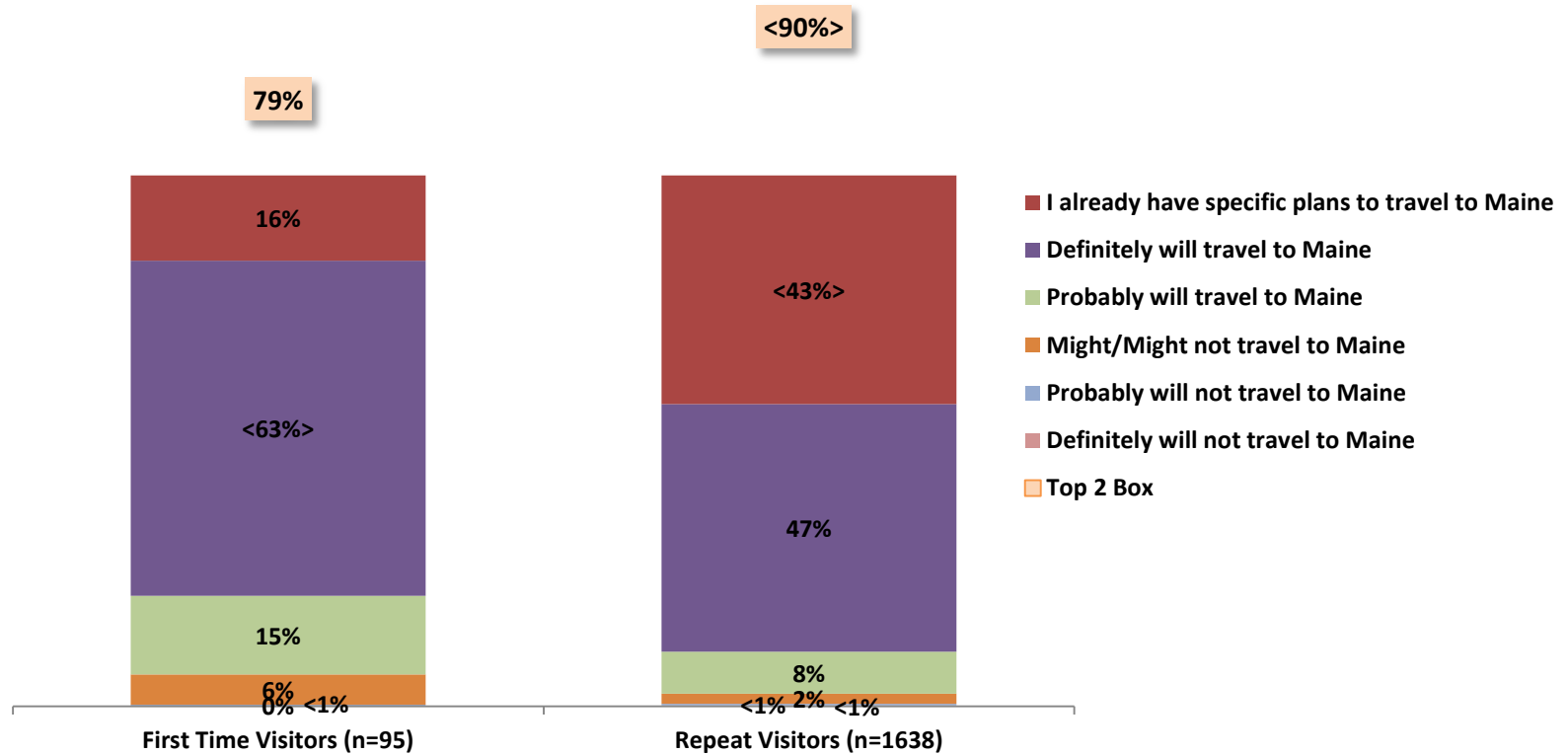
Base: Those who report family fun/children’s activities as an interest area for this Maine trip



More than three-fourths of first-time day visitors express the intent to travel to 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 visit Maine* again, while first-time visitors are more likely to indicate that they *definitely will travel to Maine*.

Future Likelihood to Travel to Maine





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