



Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report

Regional Insights: Maine Beaches



Prepared by



April 2017

Table of Contents

Research Objectives and Methodology	3
Overnight Visitors:	
Traveler Description	7
Trip Experience	12
Day Visitors:	
Traveler Description	26
Trip Experience	31
Comparison of Maine Beaches Visitors to All Maine Visitors	44

Research Objectives and Methodology

Research Objectives and Methodology

Three distinct online surveys are used to accomplish the five primary goals of the State of Maine’s visitor tracking research.

Research Objectives	Survey Instruments		
	National Omnibus	Overnight Visitor	Day Visitor
Identify Maine’s share of the U.S. travel market	✓		
Estimate the number of visitors who come to Maine	✓	✓	✓
Provide a profile of Maine visitors		✓	✓
Estimate the amount of spending devoted to tourism in Maine		✓	✓
Determine the Maine traveler’s level of satisfaction and view of Maine		✓	✓

Description of Survey Instruments

National Travel Survey

- Nationally representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine’s borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

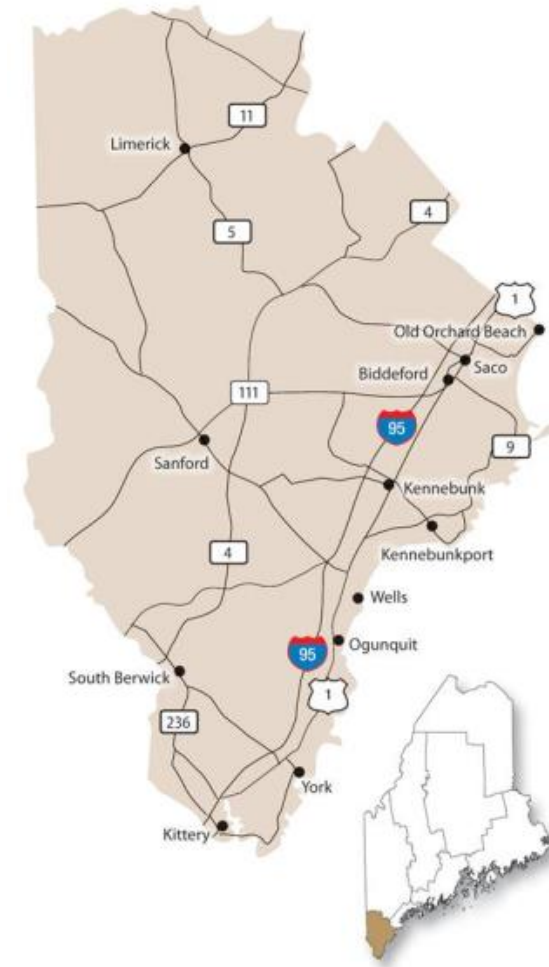
Research Objectives and Methodology

- Survey results were collected during calendar year 2016, for travel to Maine occurring between December 2015 and November 2016. The number of respondents participating in each survey statewide is:

Research Component	2016 Completed Surveys
Overnight Visitor Survey	2,909
Day Visitor Survey	1,762
National Travel Survey	21,910

Research Objectives and Methodology

- The following report summarizes results among visitors to the **Maine Beaches** tourism region during 2016, including:
 - 703 overnight visitors, and
 - 645 day visitors.
- Throughout this report, data for the **Maine Beaches** 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 $< >$. *(A statistically significant difference means the observed difference is more than would be expected by chance 95 out of 100 times.)*
- Statistically significant differences between 2015 and 2016 are also highlighted for both the Maine Beaches 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 Maine Beaches tourism region are 46 years old, on average, and have annual household incomes just under \$98,000. Two-thirds have at least a college degree, and nearly three in five are married. Sixty-three percent are employed full-time.
- Overnight visitors to the Maine Beaches tend to be older than visitors to Maine overall.

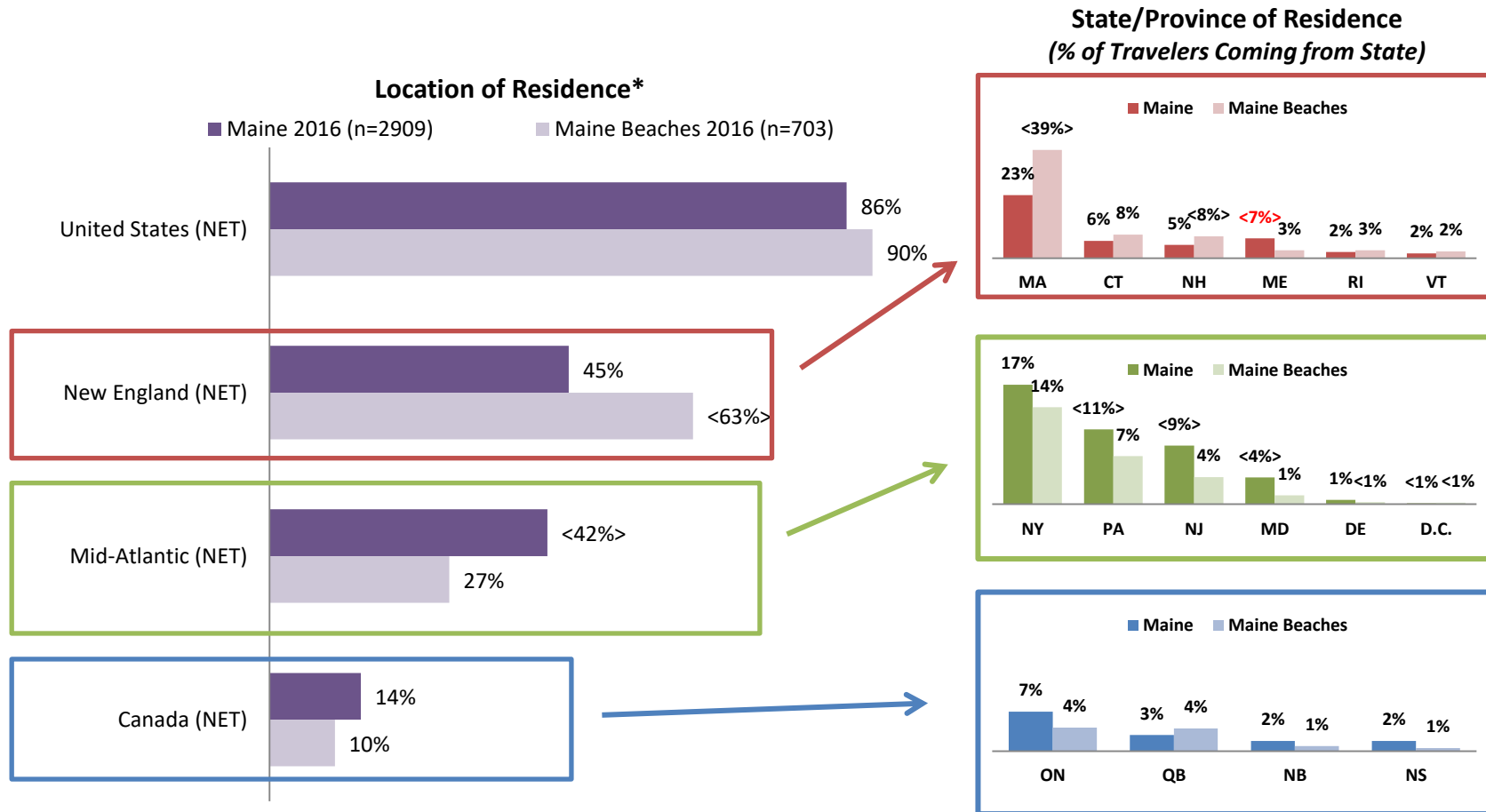
Overnight Visitors	Maine 2016 (n=2909)	Maine Beaches 2016 (n=703)
Age:		
< 35	<34%>	26%
35 - 44	22%	21%
45 - 54	18%	20%
55 +	26%	<32%>
Mean Age (Years)	42.8	<45.8>
Income:		
< \$50,000	20%	19%
\$50,000 - \$99,999	42%	42%
\$100,000 +	39%	39%
Mean Income	\$98,700	\$97,800
Female	60%	<66%>
College Degree or Higher	66%	66%
Married	56%	58%
Employed Full-Time	66%	63%

<> 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.

Massachusetts supplies more than one-third of overnight visitors to the Maine Beaches, the highest proportion of any state or province.

- Compared to the State of Maine as a whole, this region attracts a higher proportion of overnight visitors from New England (specifically Massachusetts and New Hampshire) and a lower proportion of visitors from the Mid-Atlantic.



*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

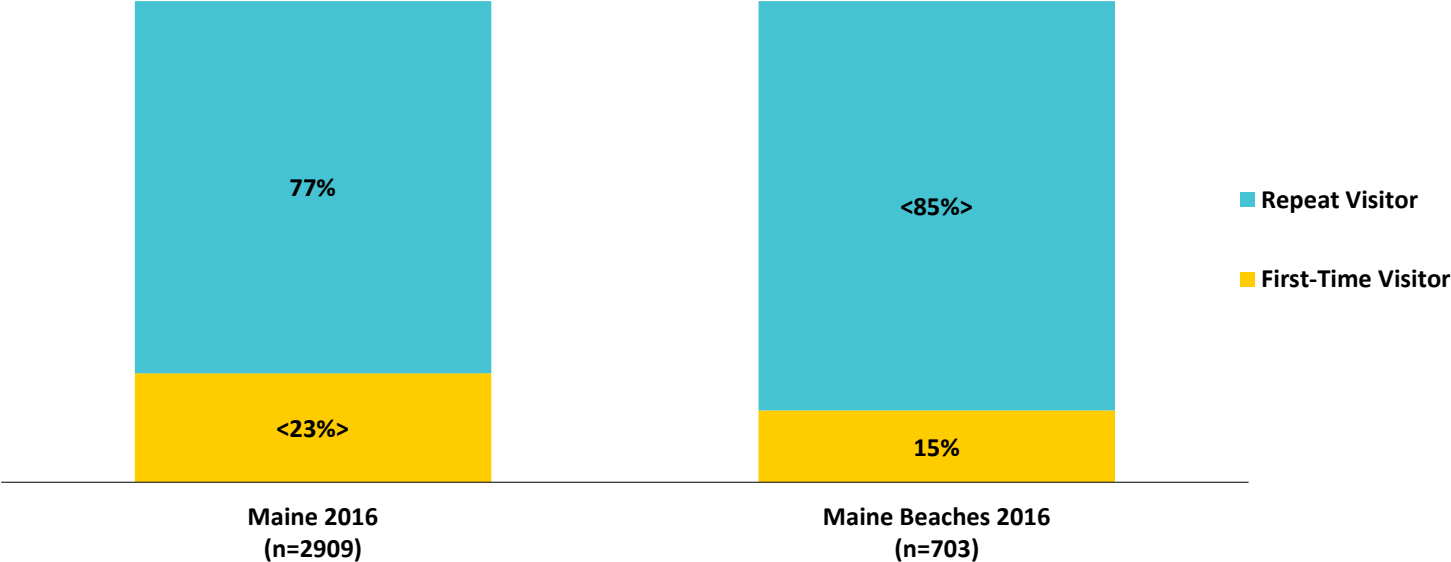
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The majority of overnight visitors to the Maine Beaches are repeat visitors.

- The Maine Beaches attracts a higher proportion of repeat visitors than does the State of Maine overall.

Repeat vs. First-Time Visitors

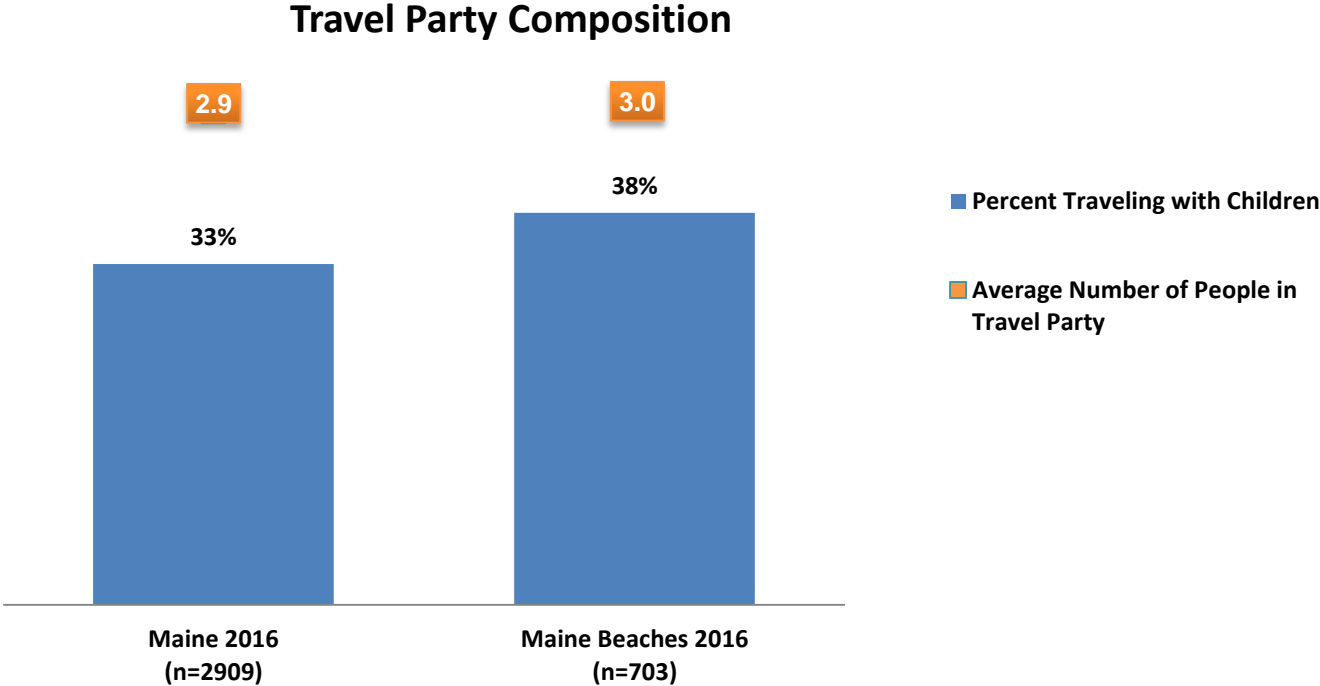


Q11. Was this your first visit in Maine?

<> 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.

On average, overnight visitors to the Maine Beaches travel in parties of three, and two-fifths have children with them.



Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q22. How many of these people were: Children?

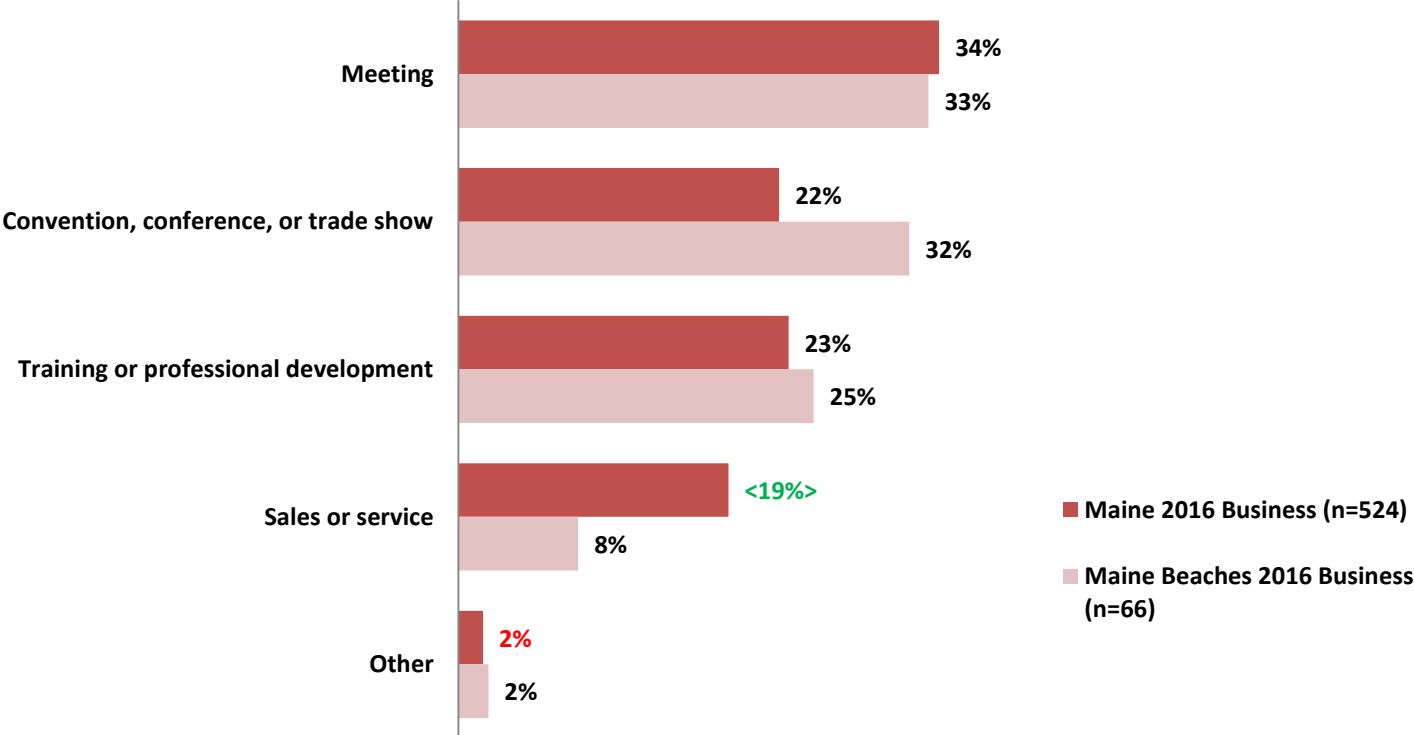
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Overnight Visitors: Trip Experience

One-third of overnight business travelers visit the Maine Beaches region for a *meeting* or for a *convention/conference/trade show*.

Primary Purpose of Overnight Business Trips



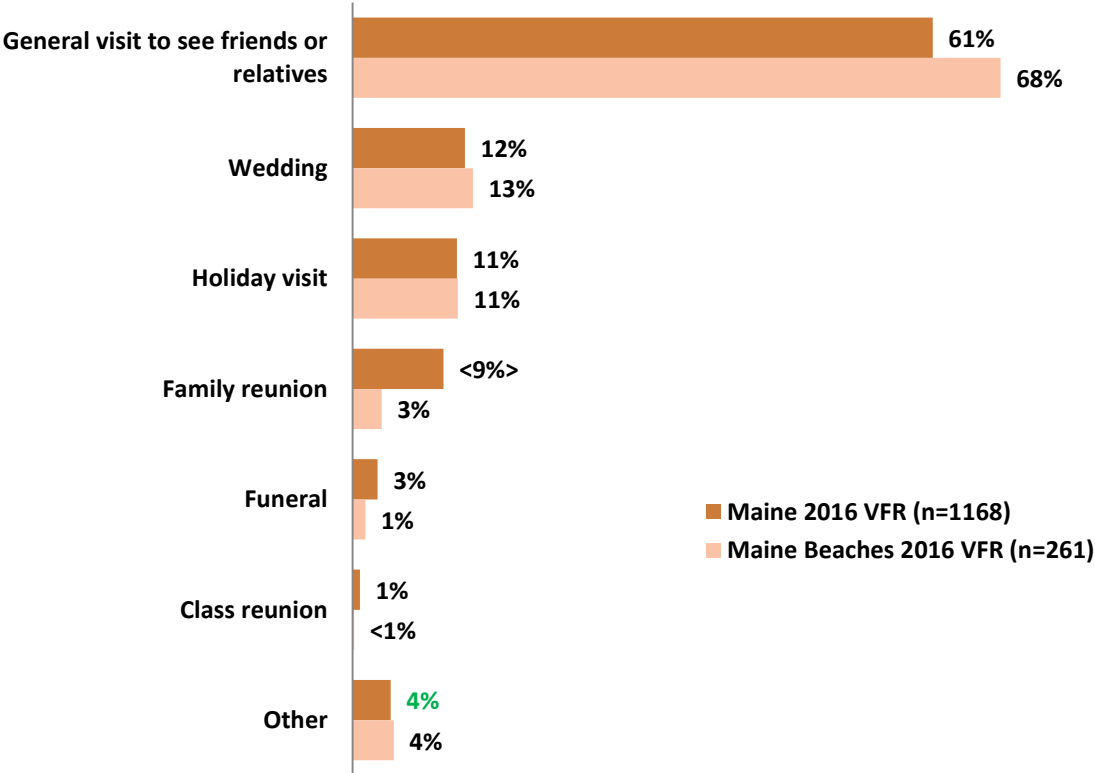
Q8. What was the primary purpose of your most recent business trip in Maine?

<> 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.

Among overnight VFR travelers, two in three are visiting for a general visit to see friends/relatives.

Primary Purpose of Overnight VFR Trips



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

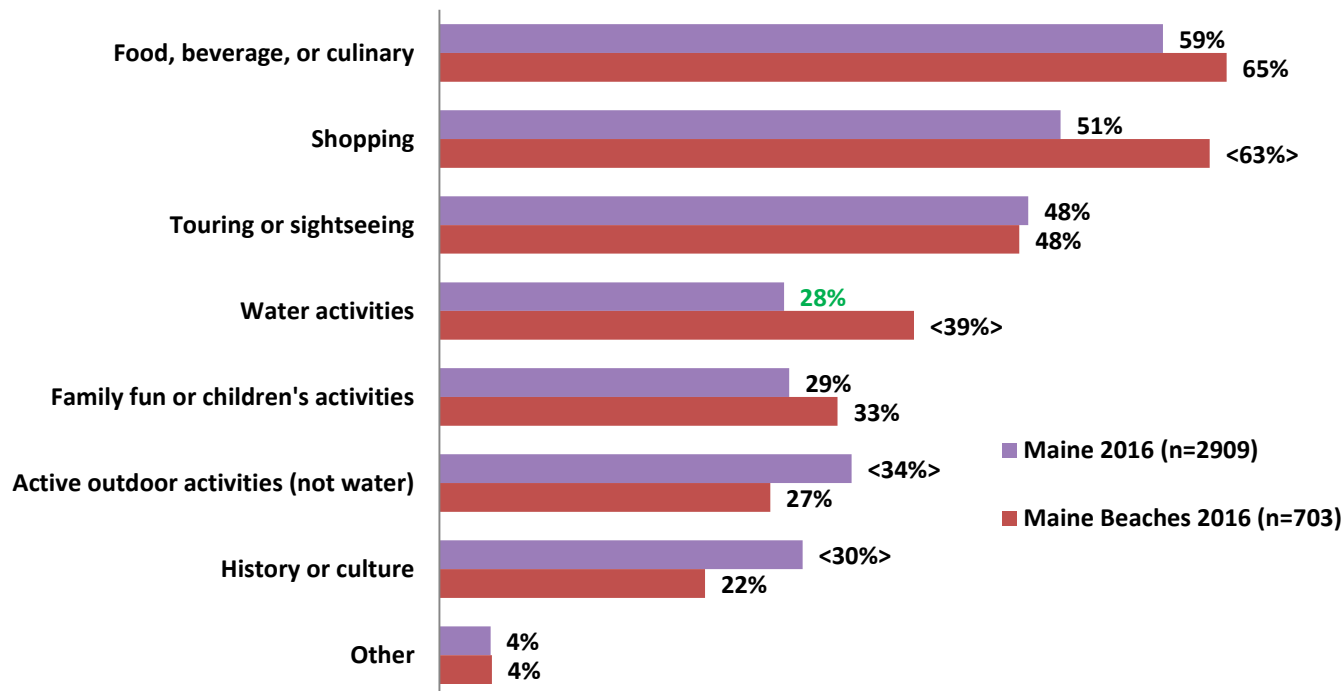
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Food/beverage/culinary activities and shopping are the top interest areas among overnight visitors to the Maine Beaches region.

- Maine Beaches visitors differ from overnight visitors to the State of Maine overall in the interest areas they want to pursue on their trip to Maine. Higher proportions of Maine Beaches visitors are interested in *shopping* and *water activities*, while *active outdoor activities* and *history/culture activities* are less popular in this region.

2016 Interest Areas



Most Important Interest Area
The Maine Beaches

Food, beverage, or culinary	31%
Shopping	21%
Touring or sightseeing	46%
Water activities	38%
Family fun or children's activities	46%
Active outdoor activities (not water)	19%
History or culture	25%
Other	92%

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

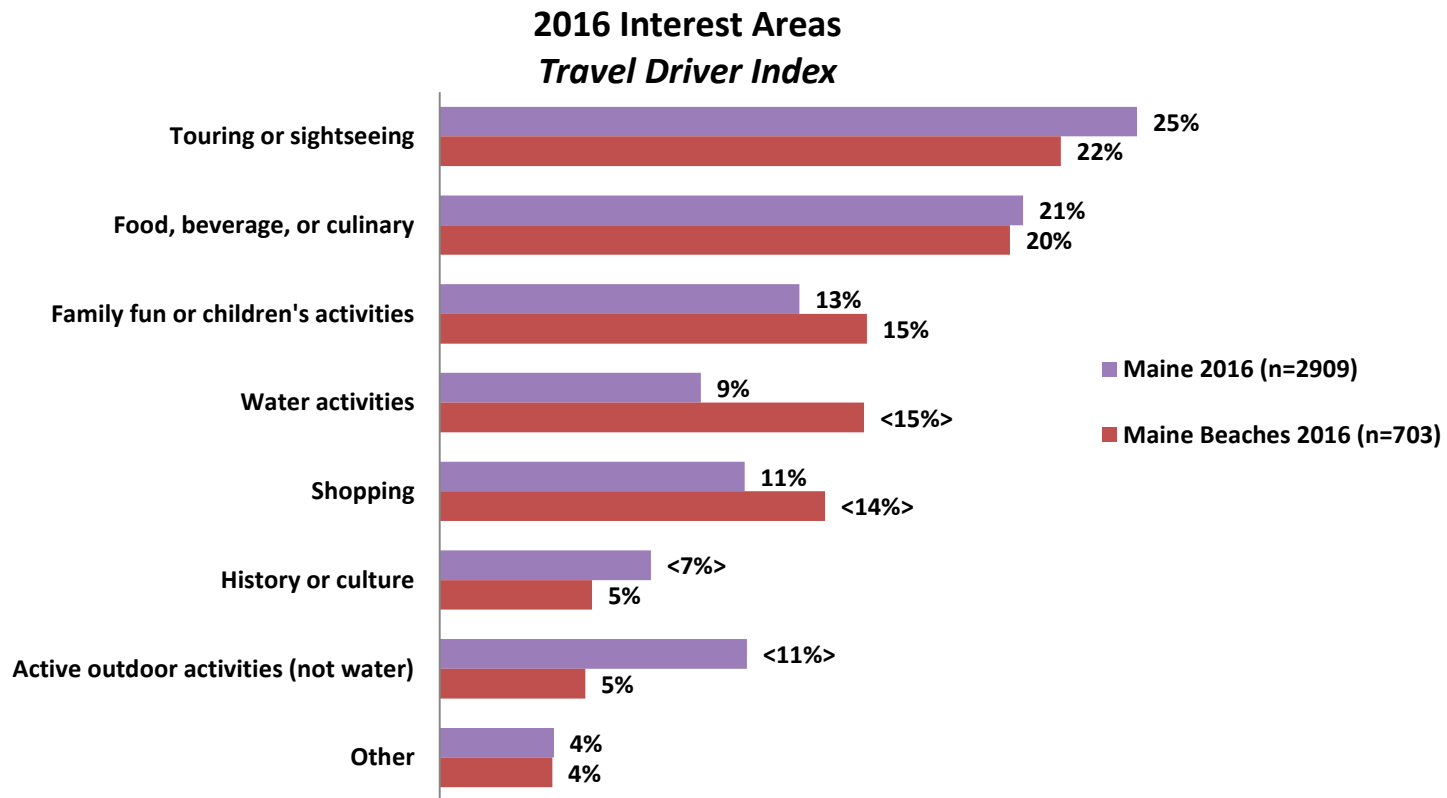
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

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

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

When considering both interest and importance together, touring/sightseeing and food/beverage/culinary activities rank highest among overnight visitors to the Maine Beaches region.

- Water activities and shopping both rank higher in terms of interest and importance for the Maine Beaches region, as compared to the State as a whole. History/culture and active outdoor activities, on the other hand, rank lower among overnight visitors to this region as compared to the rest of the State.



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? Please check all that apply.

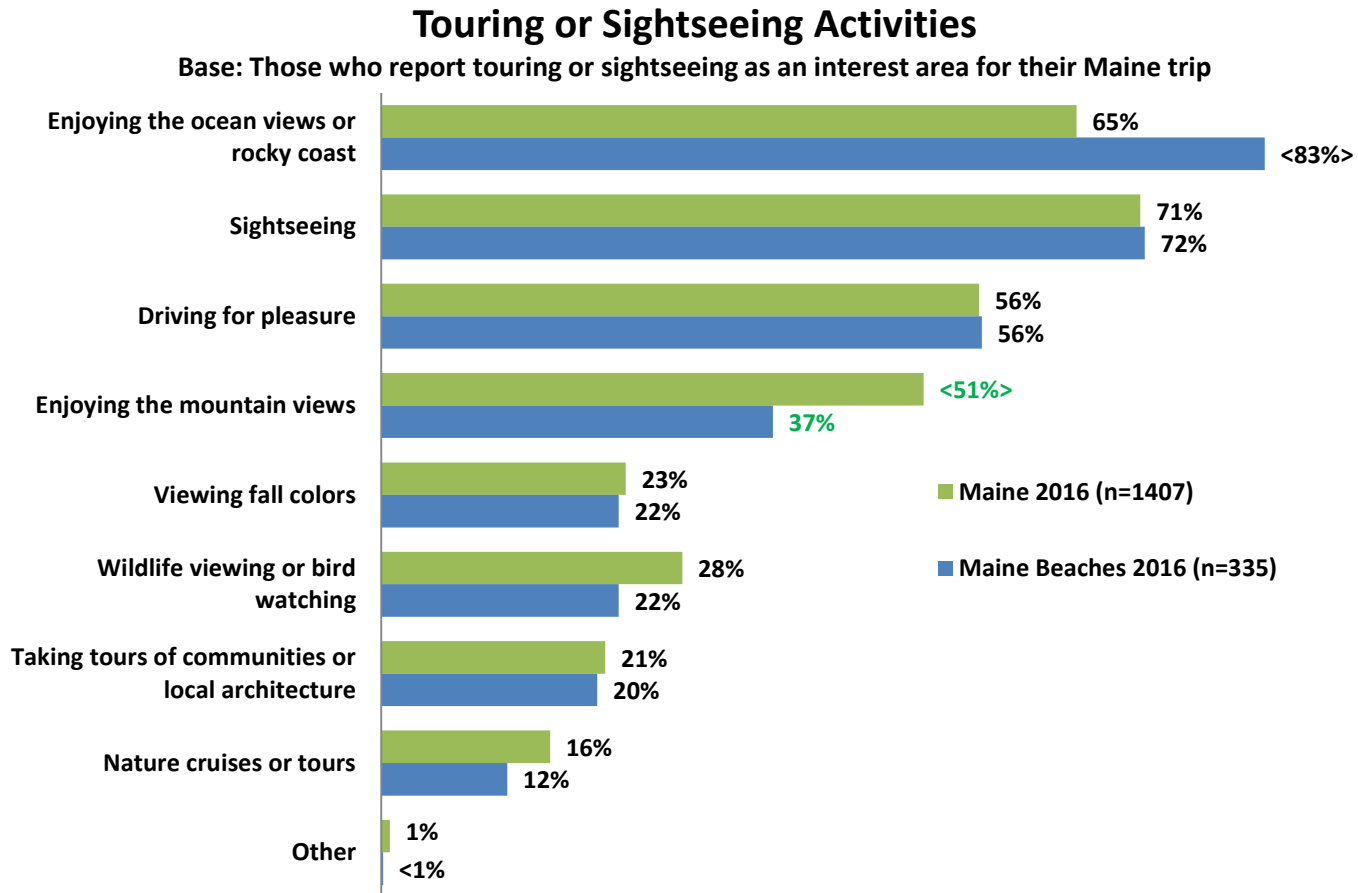
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 16

<> 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 most common activities among overnight visitors to the region who are interested in touring/sightseeing are *enjoying the ocean views/rocky coast and sightseeing*.

- Perhaps predictably, overnight visitors to the Maine Beaches region who are interested in touring or sightseeing are more likely to *enjoy the ocean views/rocky coast* while visiting compared to visitors to the state overall, but are less likely to *enjoy mountain views*.



Q34. 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.

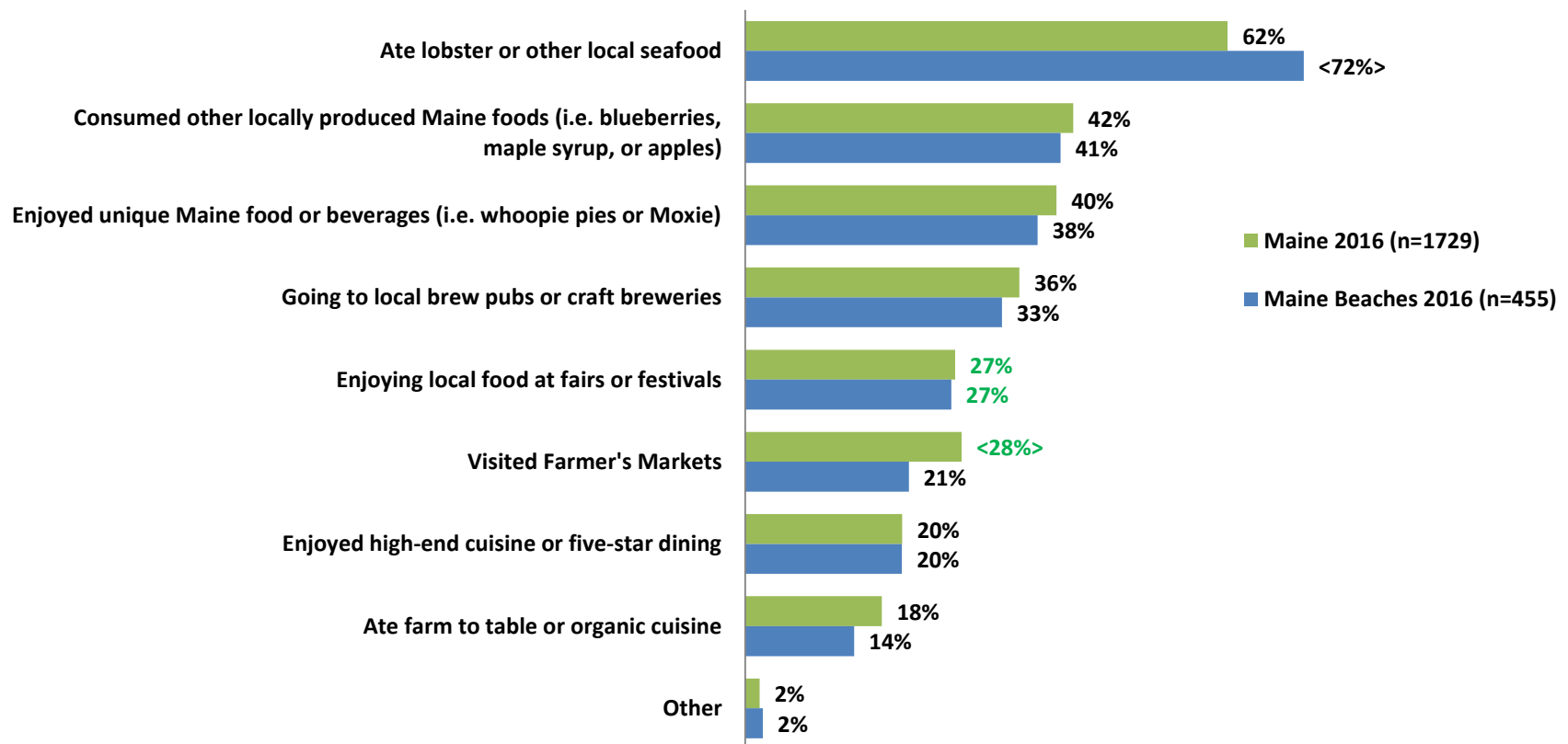
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in four overnight visitors who are interested in food/beverage/culinary activities ate lobster or other local seafood while visiting the Maine Beaches region.

- Eating lobster or other local seafood is more common among visitors to the Maine Beaches region than among all overnight visitors to the State of Maine, while visiting Farmer's Markets is less common.

Food, Beverage, or Culinary Activities

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



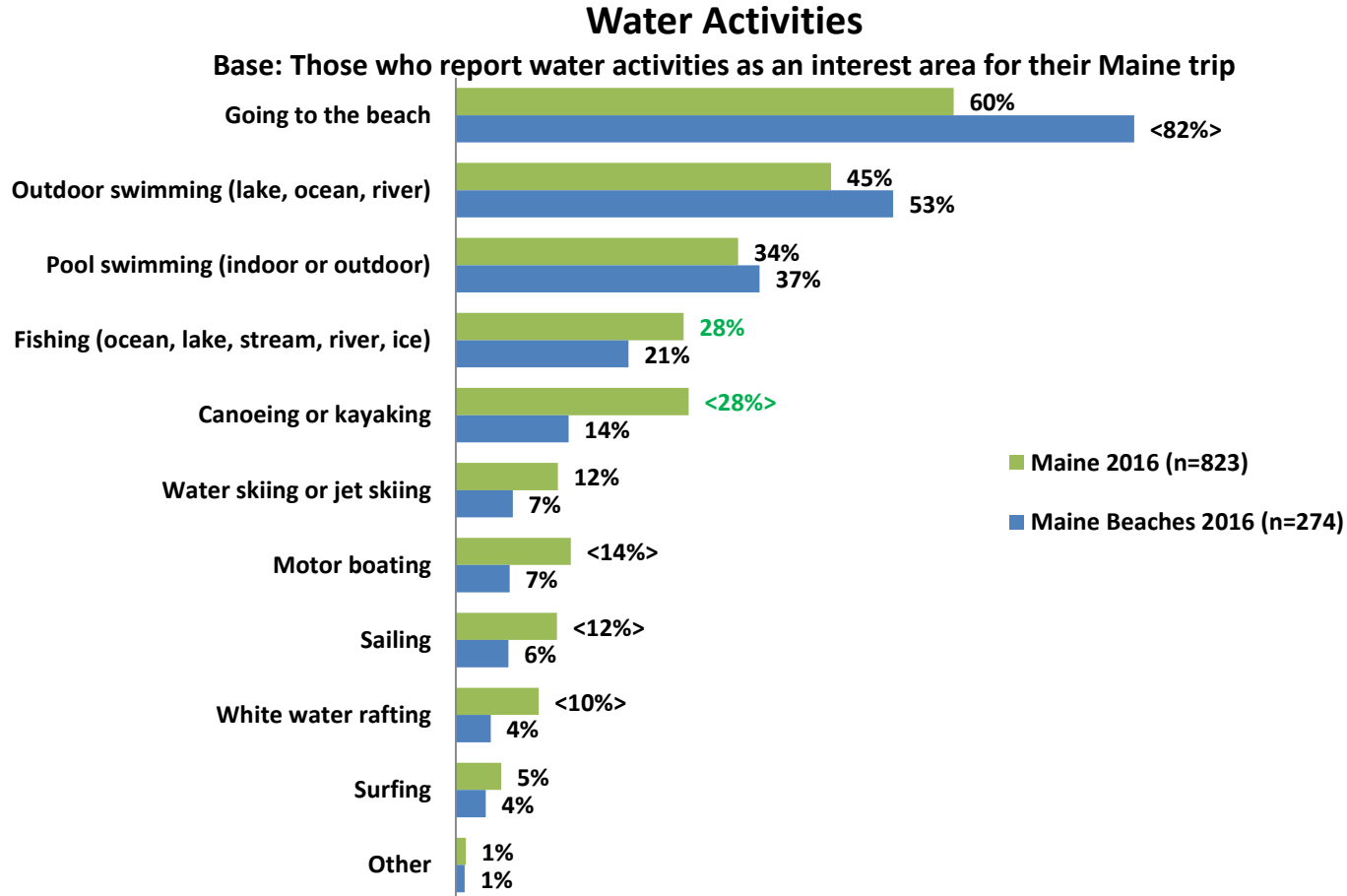
Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

Among overnight visitors interested in water activities, *going to the beach* is the most common activity in the Maine Beaches region.

- As expected, overnight visitors to the Maine Beaches region are more likely to *go to the beach* compared to visitors to the State as a whole. However, they are less likely to *canoe or kayak, motor boat, sail, or go white water rafting* while in the area.



Q34. In which of the following activities did you participate during this trip? *Please check all that apply.*

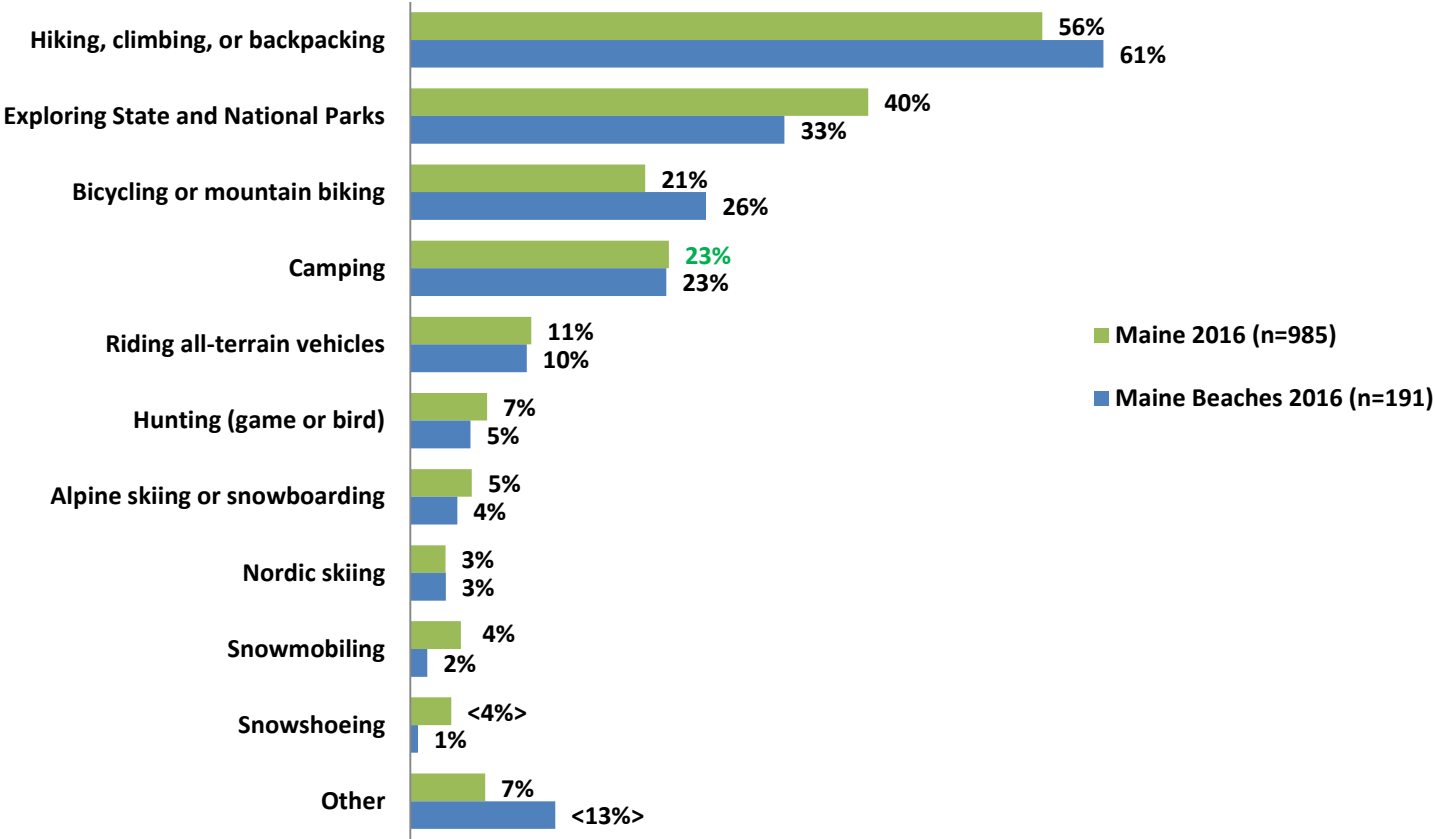
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Three in five visitors to the Maine Beaches region who are interested in active outdoor activities go *hiking/climbing/backpacking* while visiting.

Active Outdoor Activities – Non-Water

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



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

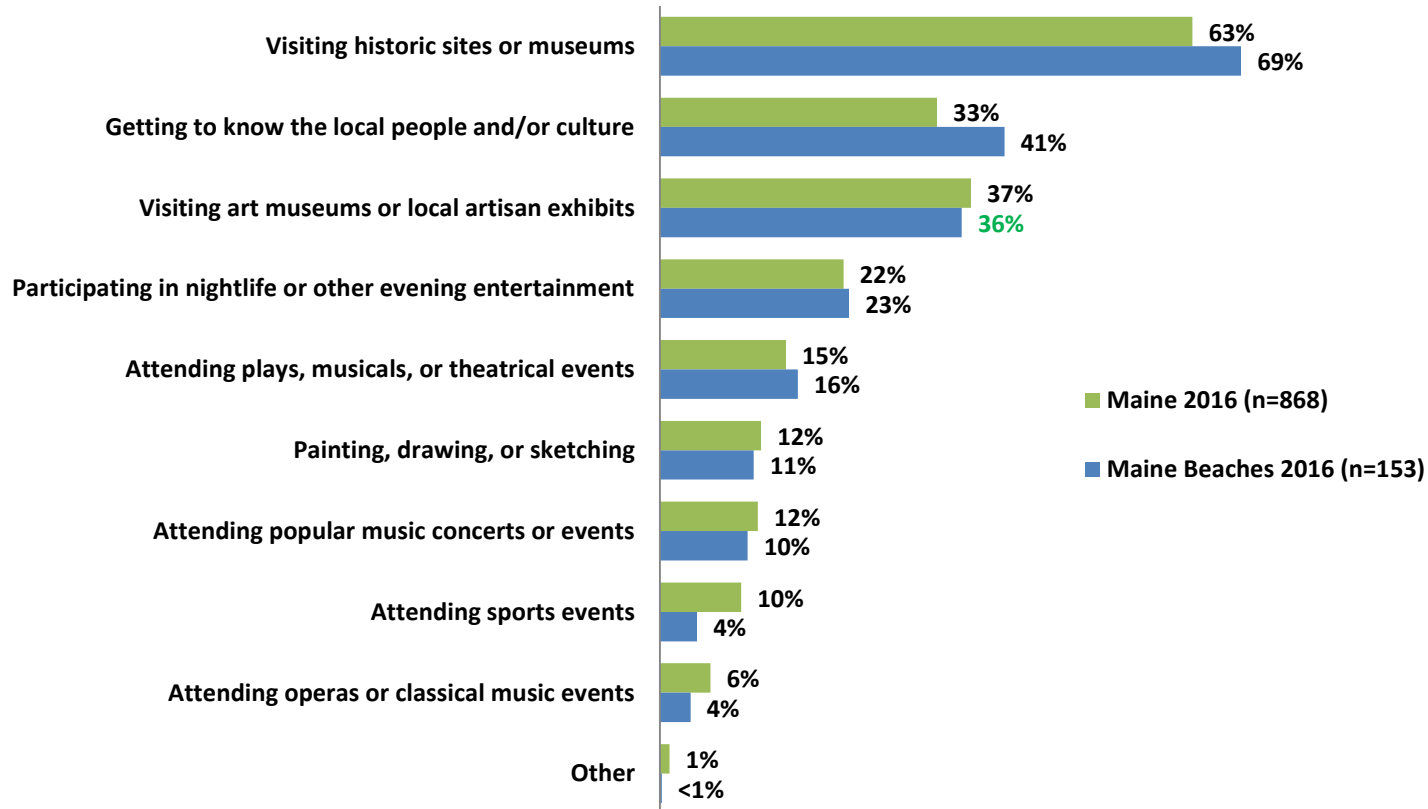
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Visiting historic sites/museums is the most common activity among overnight visitors to the Maine Beaches who are interested in history/culture activities.

History or Culture Activities

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



Q34. 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.

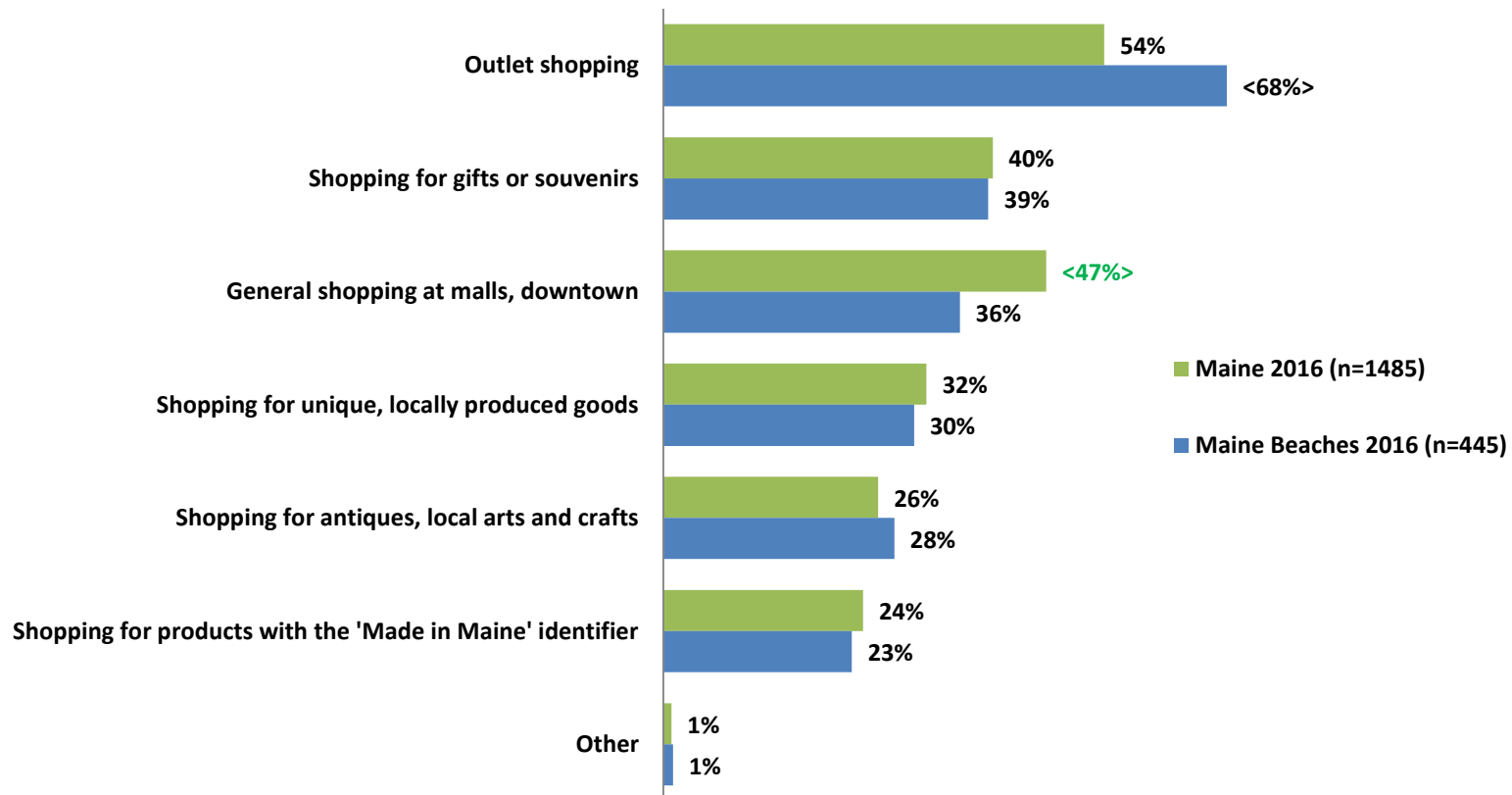
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outlet shopping is the most popular shopping activity among overnight visitors to the Maine Beaches region.

- Compared to overnight visitors to the State of Maine overall, Maine Beaches visitors are more likely to *shop at the outlets* while visiting and less likely *shop at malls or downtown*.

Shopping Activities

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



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

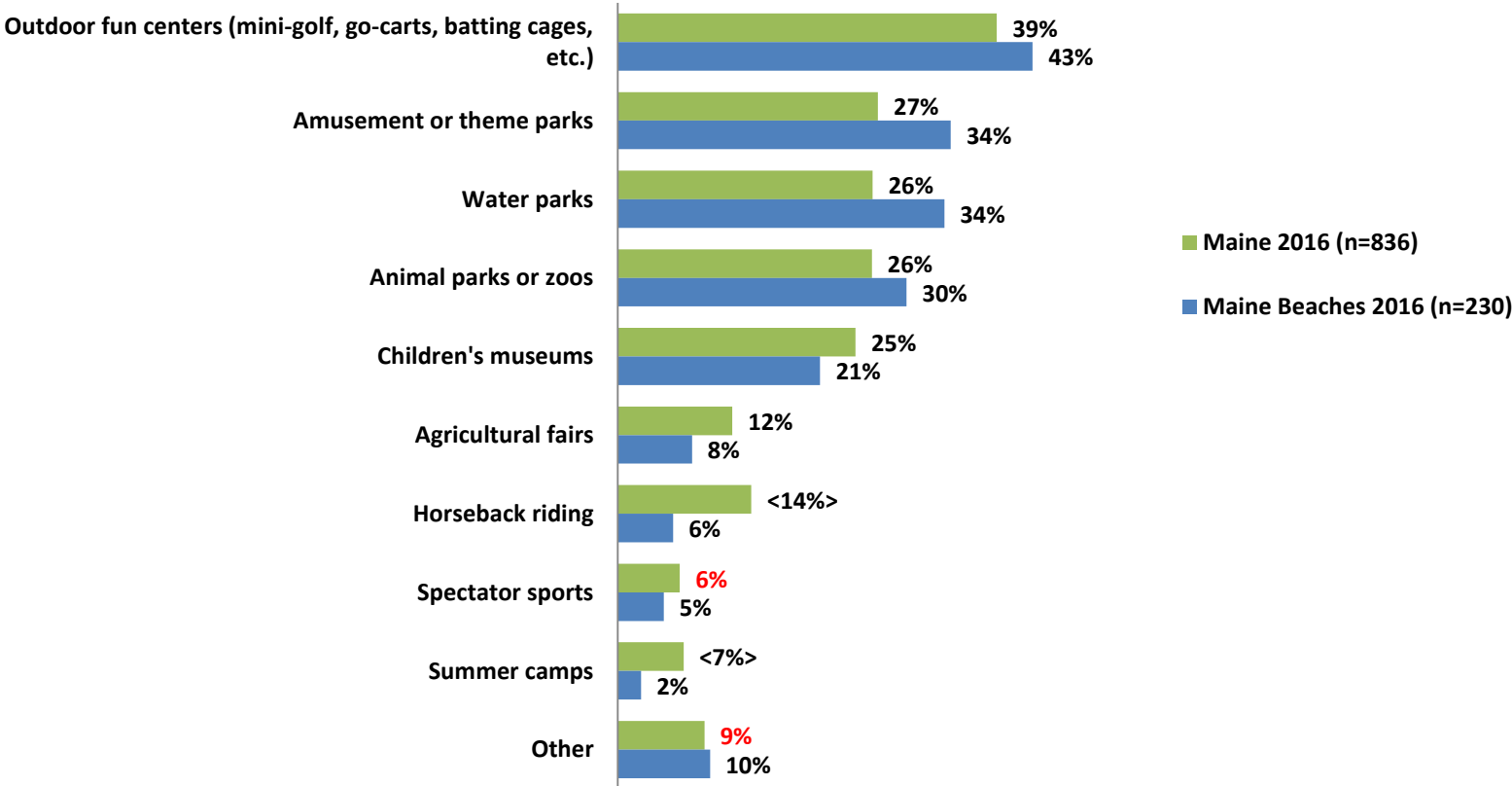
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Two in five overnight visitors to the region who are interested in family fun/children's activities go to outdoor fun centers.

Family Fun/Children's Activities

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

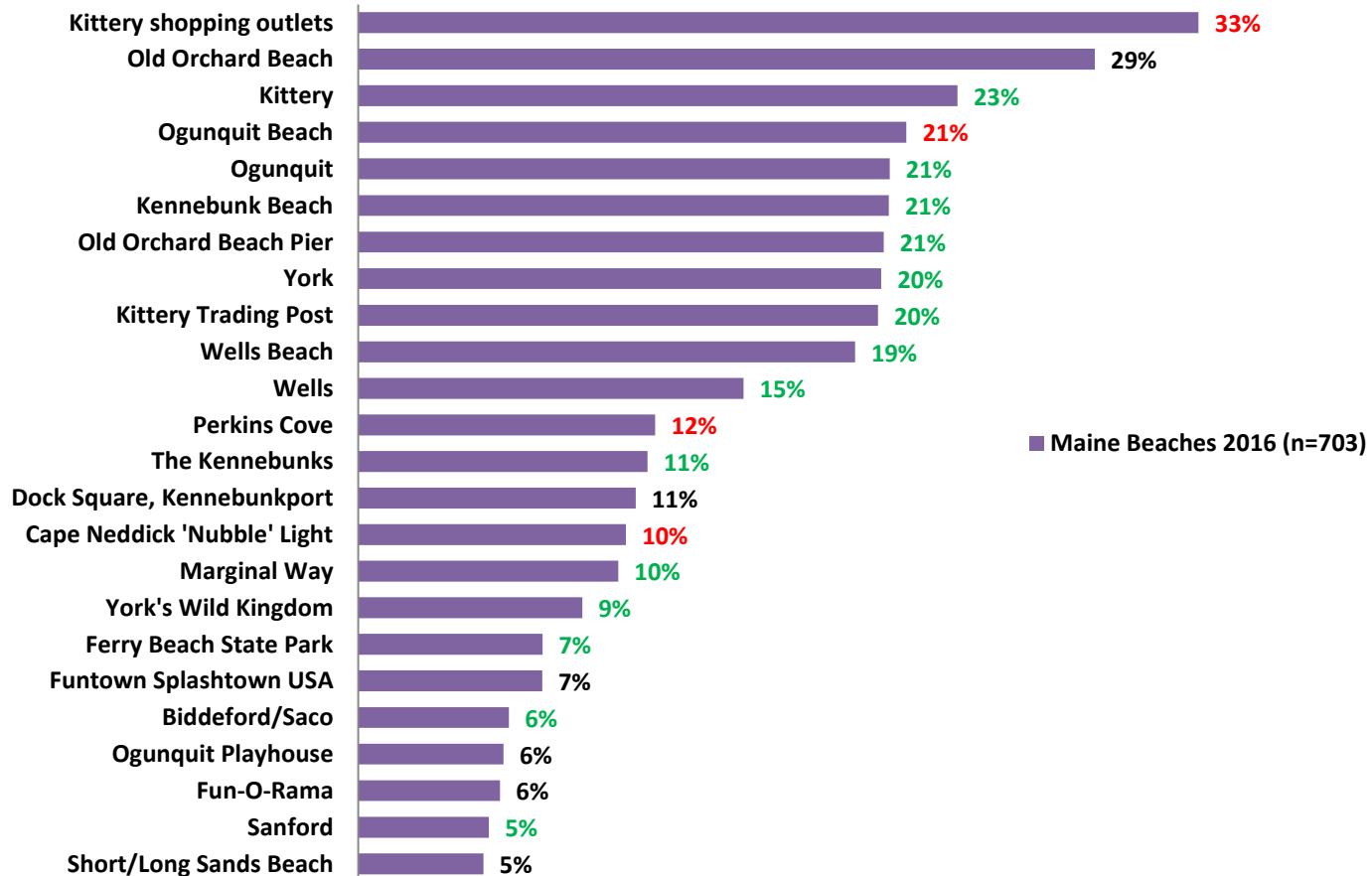


Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

The Kittery shopping outlets and Old Orchard Beach are the most commonly visited attractions in the Maine Beaches region.

Top Attractions/Locations Visited*



* Does not include response options selected by fewer than 5% of respondents.

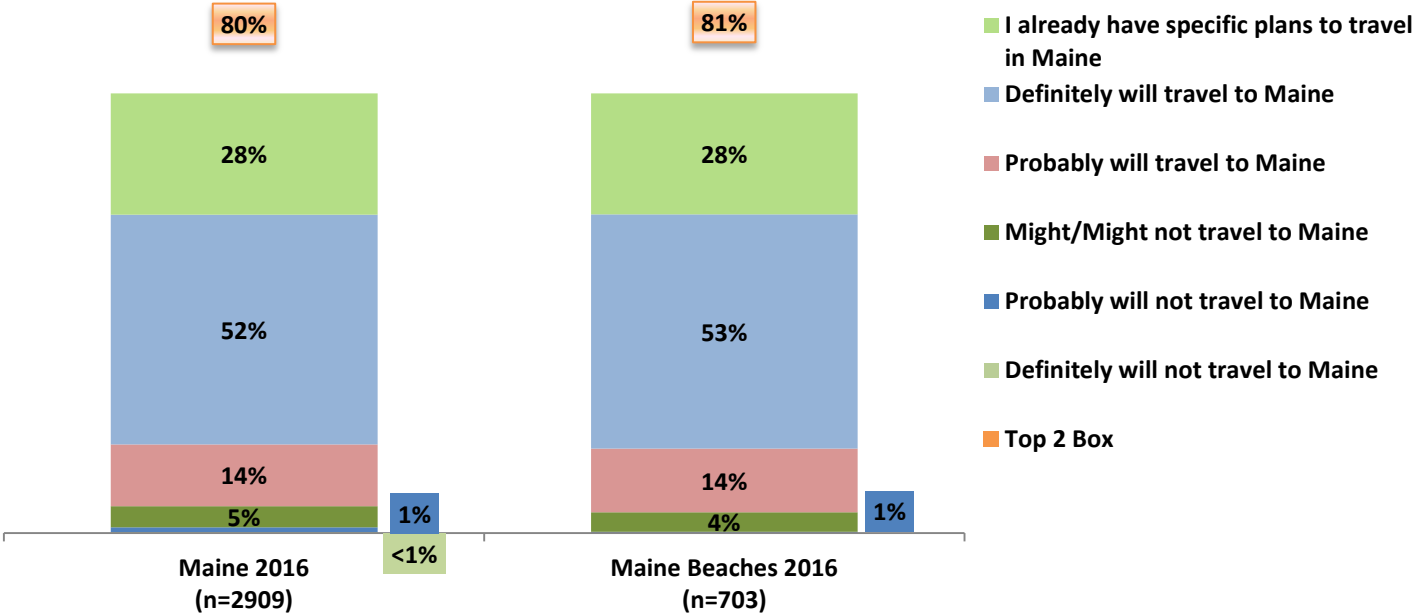
Q29. Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

<> 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.

Eight in ten overnight visitors to the Maine Beaches region plan to return to Maine in the next two years.

Future Travel Likelihood



Q41. How likely will you be to travel in Maine in the next two years?
<> 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.

Day Visitors: Traveler Description

Day Visitor Demographics

- Day visitors to the Maine Beaches region average 47 years old and earn an average of \$95,000 annually. Half are employed full-time.
- Day visitors to the Maine Beaches region are similar in age to Maine day visitors overall, but have higher average annual household incomes.

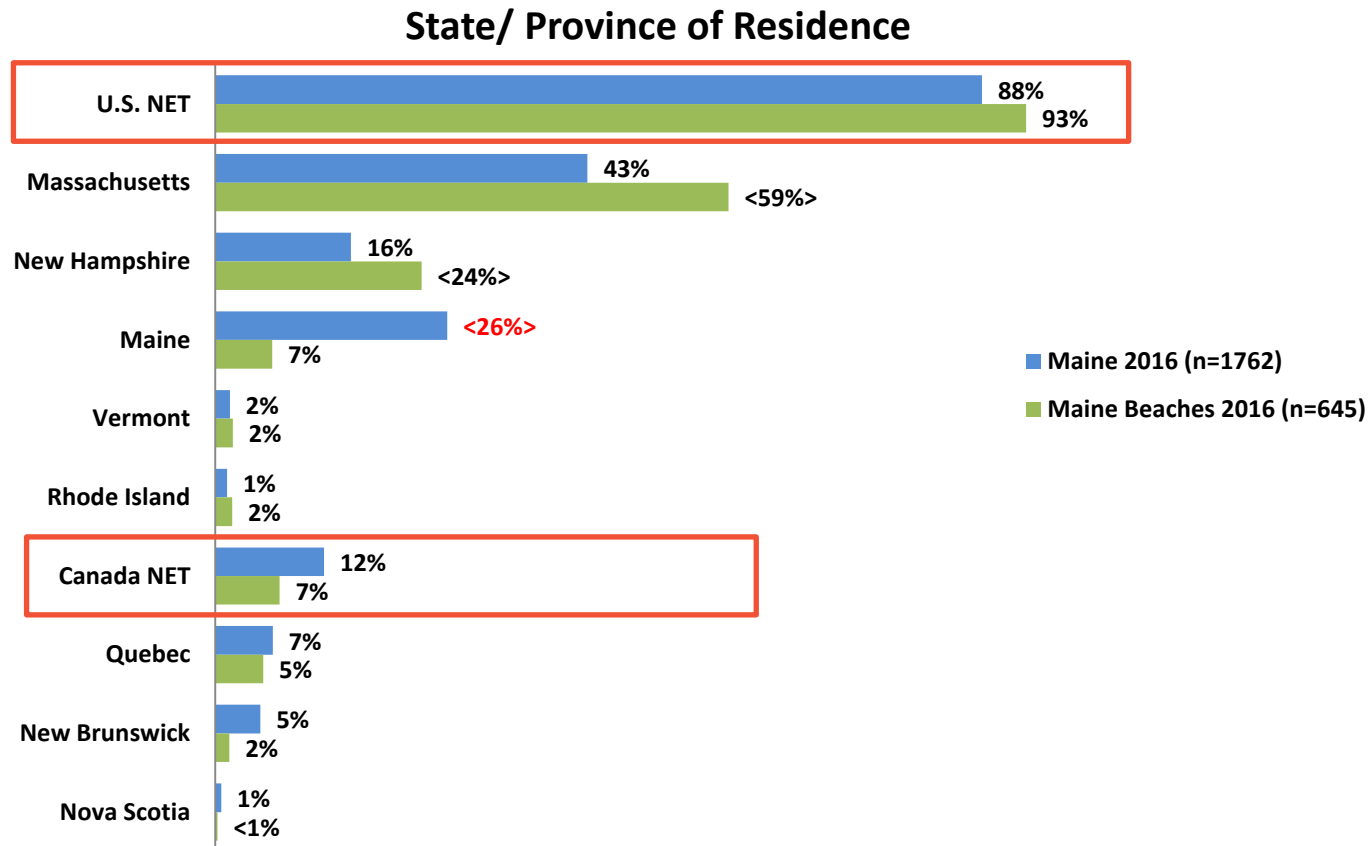
Day Visitors	Maine 2016 (n=1762)	Maine Beaches 2016 (n=645)
Age:		
< 35	28%	26%
35 - 44	18%	17%
45 - 54	19%	19%
55 +	35%	38%
Mean Age (Years)	46.0	47.2
Income:		
< \$50,000	26%	20%
\$50,000 - \$99,999	42%	41%
\$100,000 +	32%	<39%>
Mean Income	\$88,100	<\$95,000>
Female	75%	76%
College Degree or Higher	63%	63%
Married	56%	57%
Employed Full-Time	52%	48%

<> 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 day visitors to the region are United States residents, and over half are from Massachusetts.

- Compared to the State of Maine as a whole, the Maine Beaches region attracts a greater proportion of day visitors from Massachusetts and New Hampshire, and a lesser proportion from Maine.



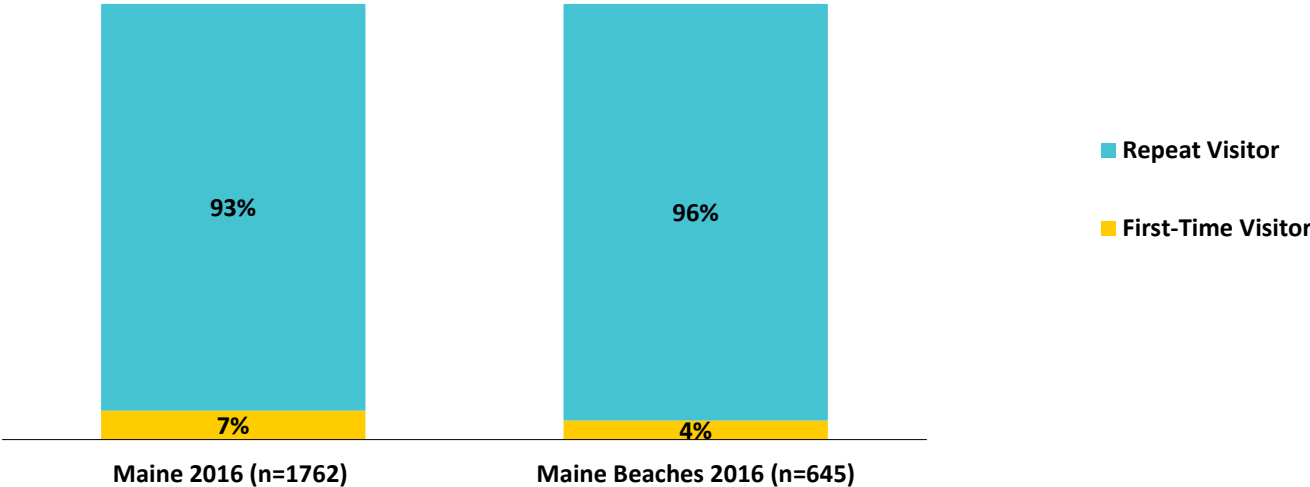
Q2. In what State or Province do you reside?

<> 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.

Almost all day visitors to the Maine Beaches are repeat visitors.

Repeat vs. First-Time Visitors

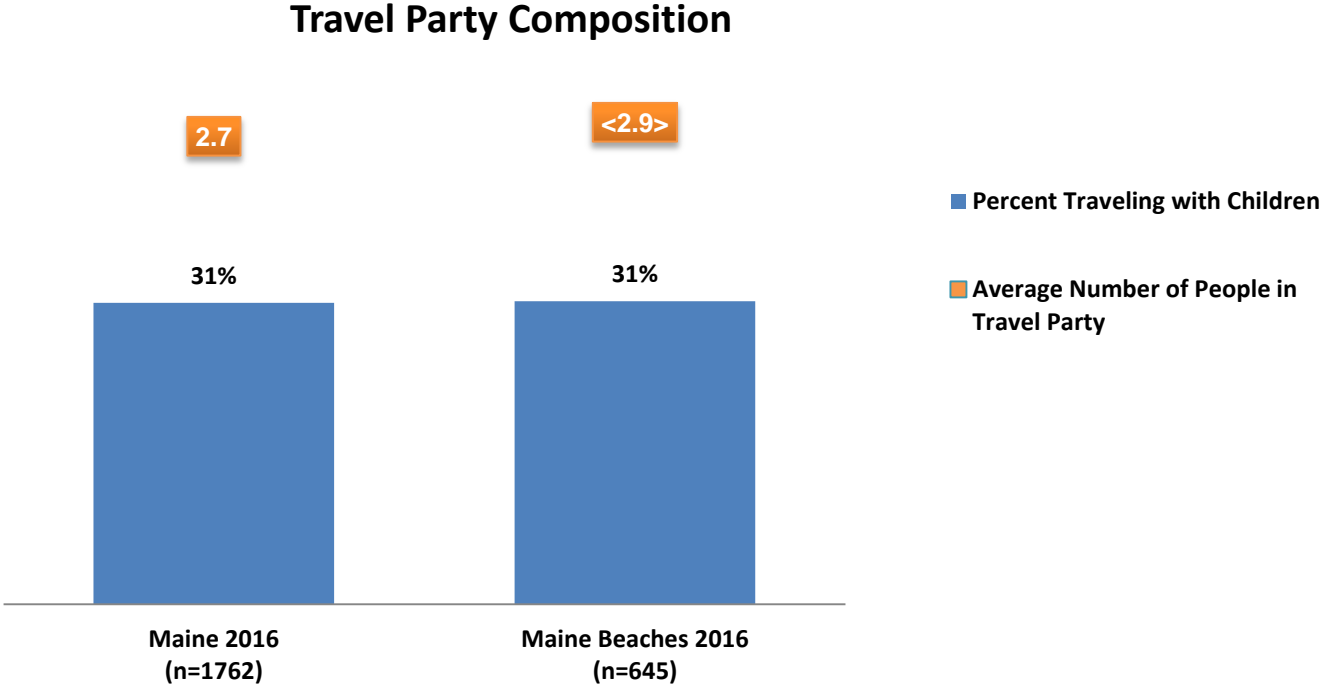


Q10. Was this your first trip to Maine?

<> 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.

On average, day visitors to the Maine Beaches region are traveling in parties of three, and one-third are traveling with children.



Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q16. How many of these people were: Children

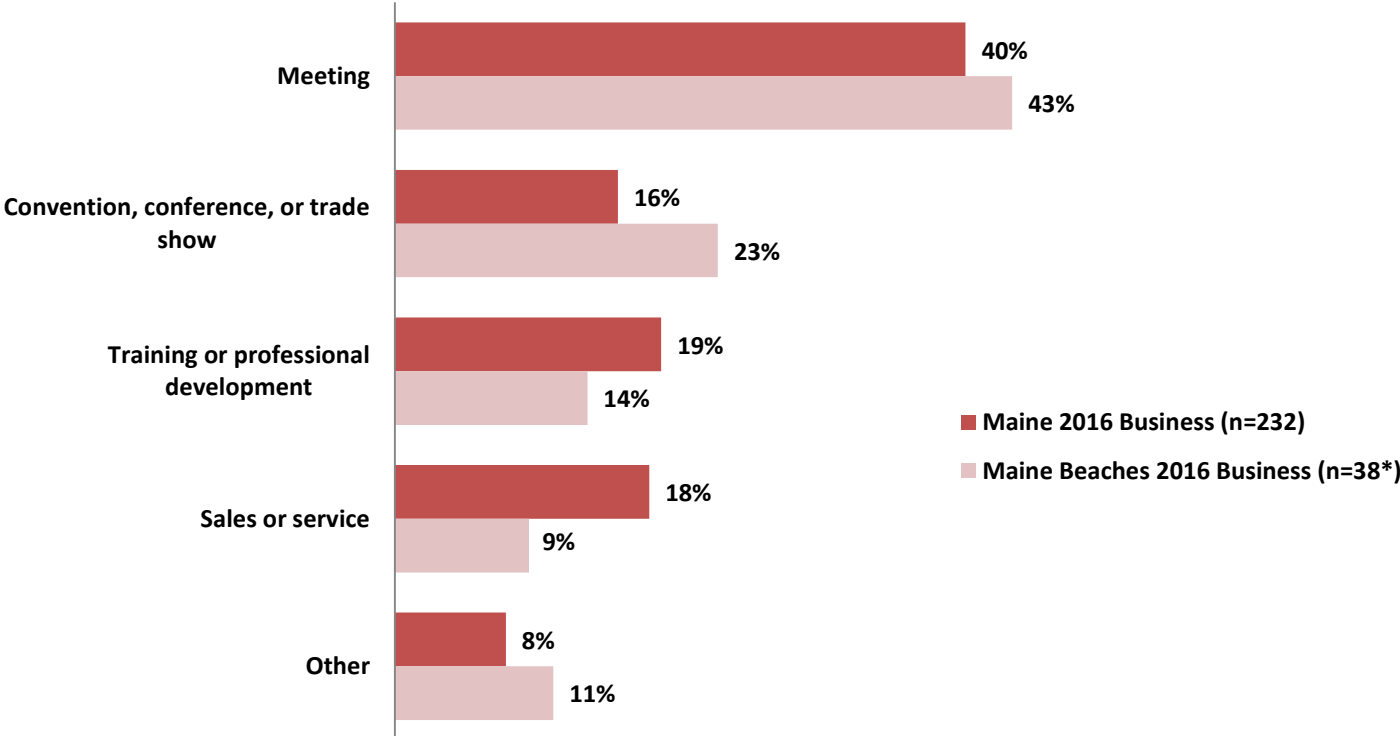
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Day Visitors: Trip Experience

Business day visitors to the Maine Beaches region are most likely to be visiting for a *meeting*.

Primary Purpose of Day Business Trips



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

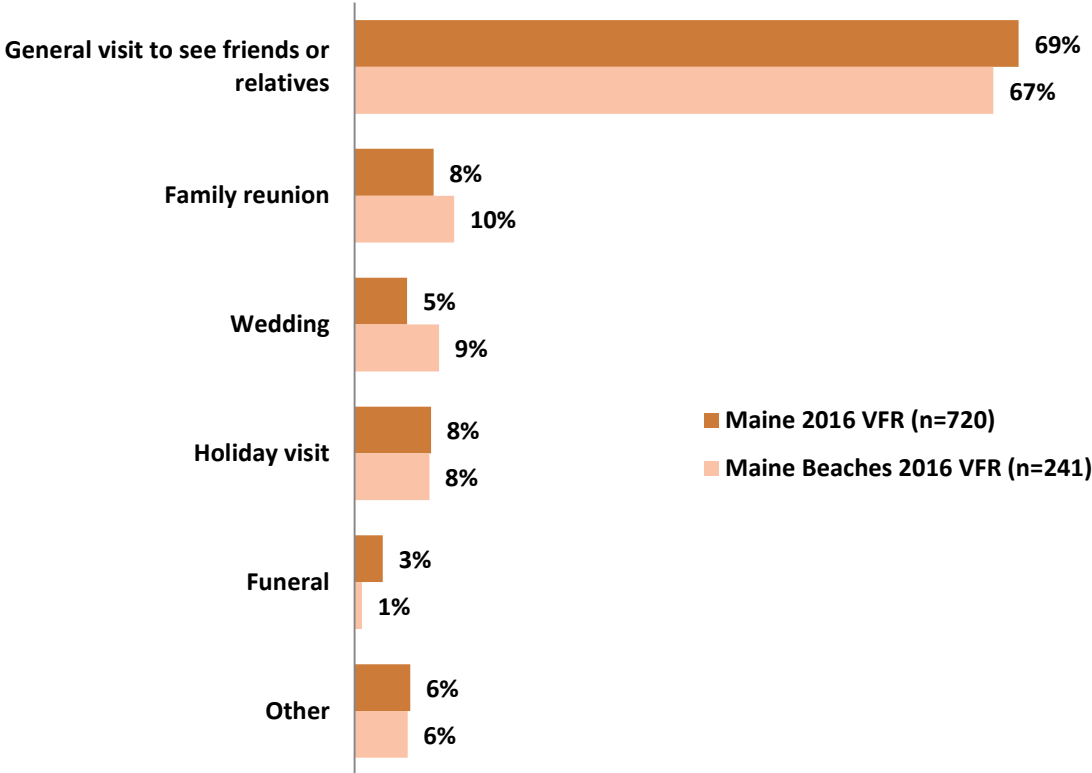
<> indicates a significant difference between subgroups at the 95% confidence level.

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

*Please note small sample size. Use caution when interpreting results.

Two in three VFR day visitors cite a *general visit to see friends/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?

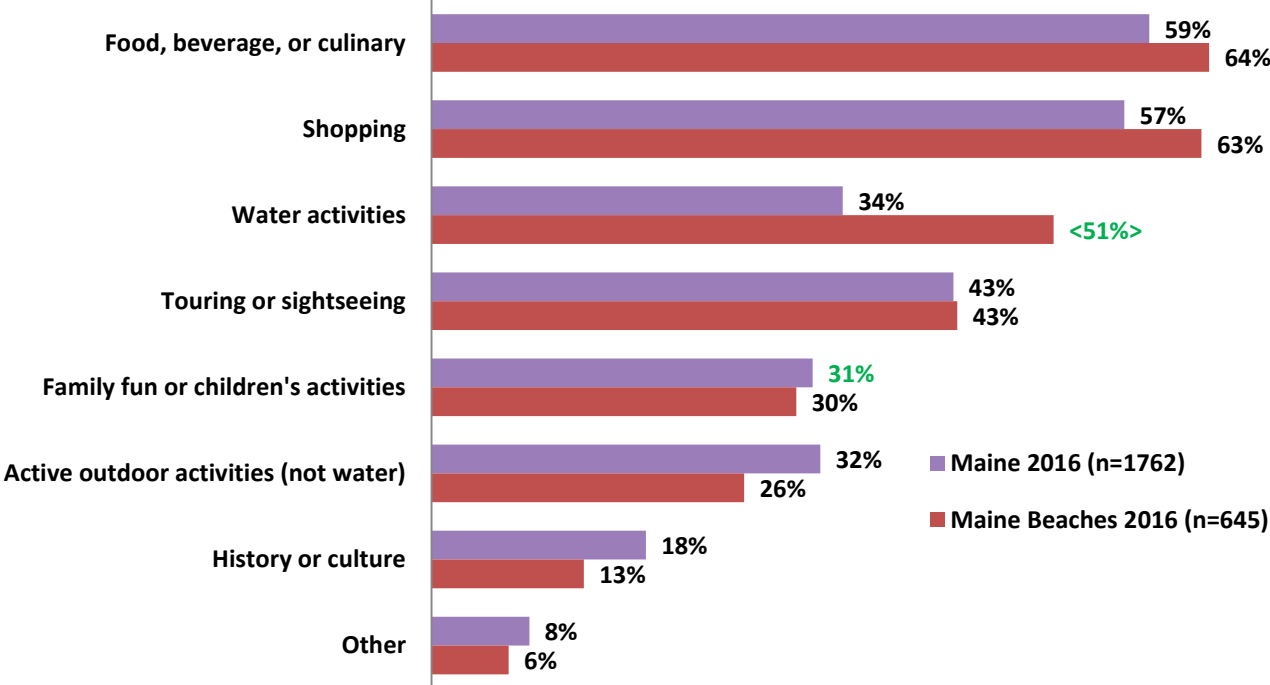
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Day visitors to the Maine Beaches are especially likely to pursue *food/beverage/culinary* interests or *shopping*.

- A higher proportion of day visitors to this region are interested in *water activities* compared to all Maine visitors.

2016 Interest Areas



Most Important Interest Area Maine Beaches	
Food, beverage, or culinary	22%
Shopping	22%
Water activities	44%
Touring or sightseeing	44%
Family fun or children's activities	54%
Active outdoor activities (not water)	25%
History or culture	14%
Other	94%

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q19. 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.

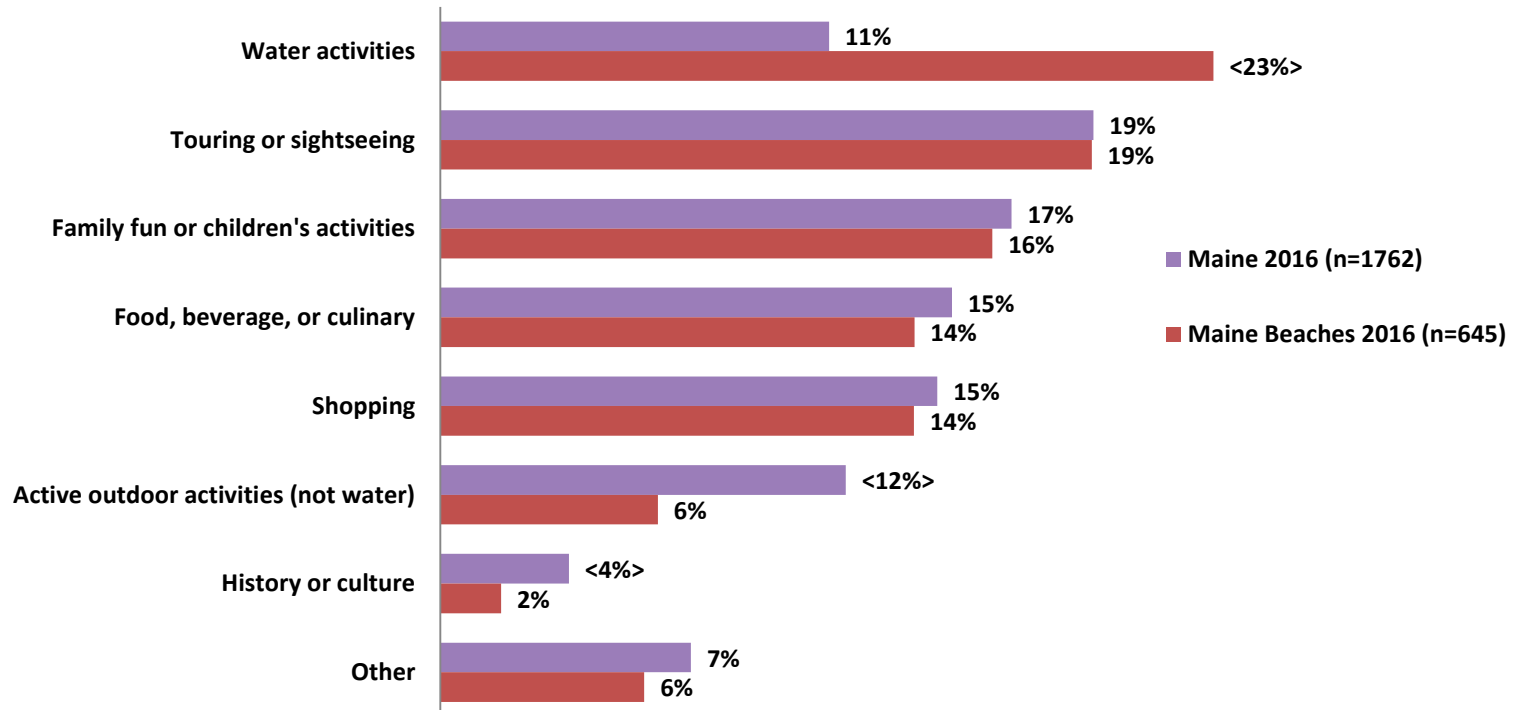
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



When considering both interest and importance in deciding to visit, *water activities* and *touring/sightseeing* rank highest among day visitors.

- *Water activities* rank higher among day visitors to the Maine Beaches region than among day visitors to the State overall. *Active outdoor activities* and *history/culture* activities rank lower among day visitors to this region.

**2016 Interest Areas
Travel Driver Index**



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

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

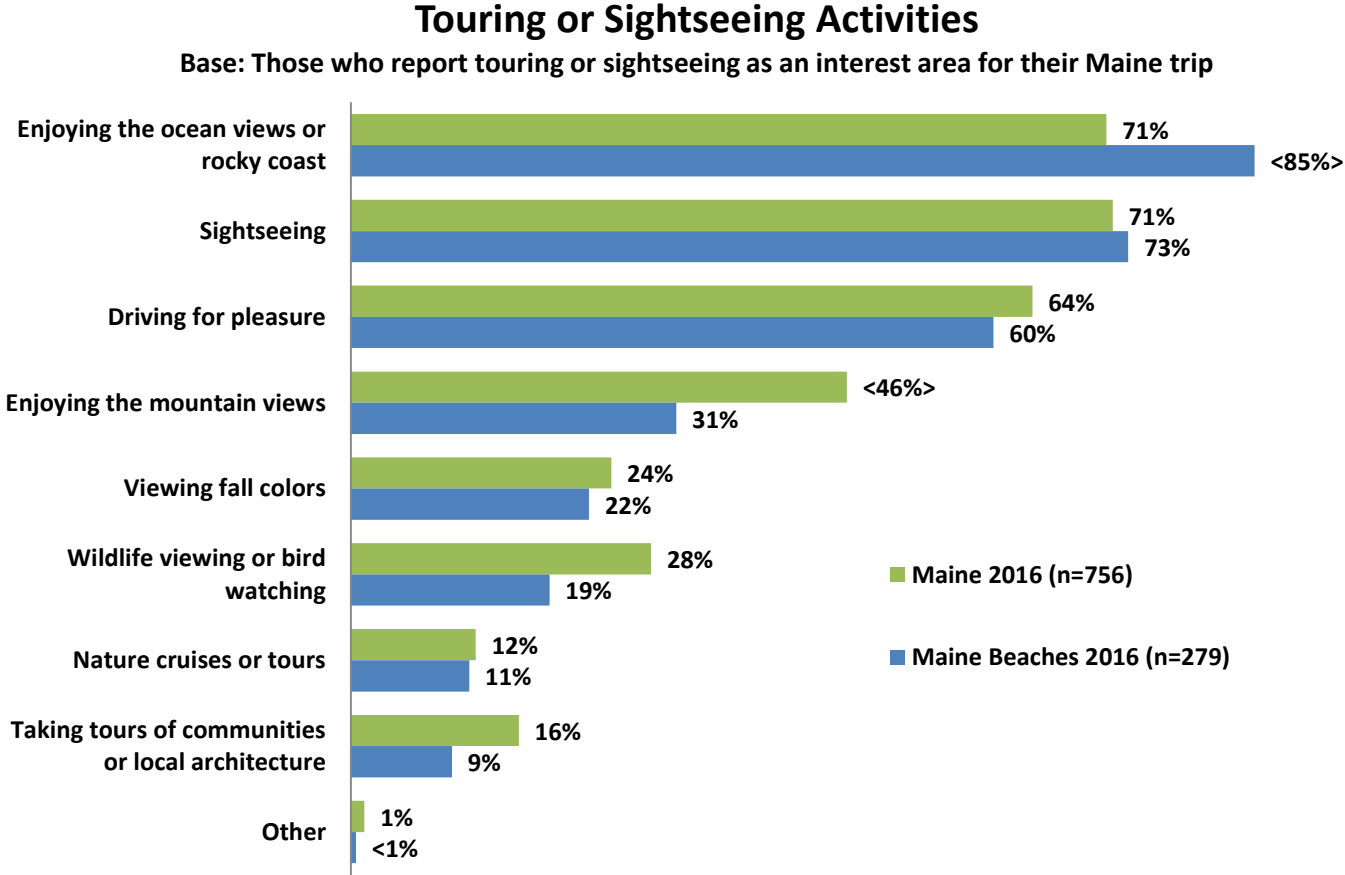
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 35

<> 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.

Enjoying the ocean views/rocky coast is the most popular activity among day visitors to the Maine Beaches who are interested in touring/sightseeing activities.

- A higher proportion of day visitors to this region *enjoy ocean views or the rocky coast* compared to all Maine visitors, while a lesser proportion *enjoy the mountain views*.



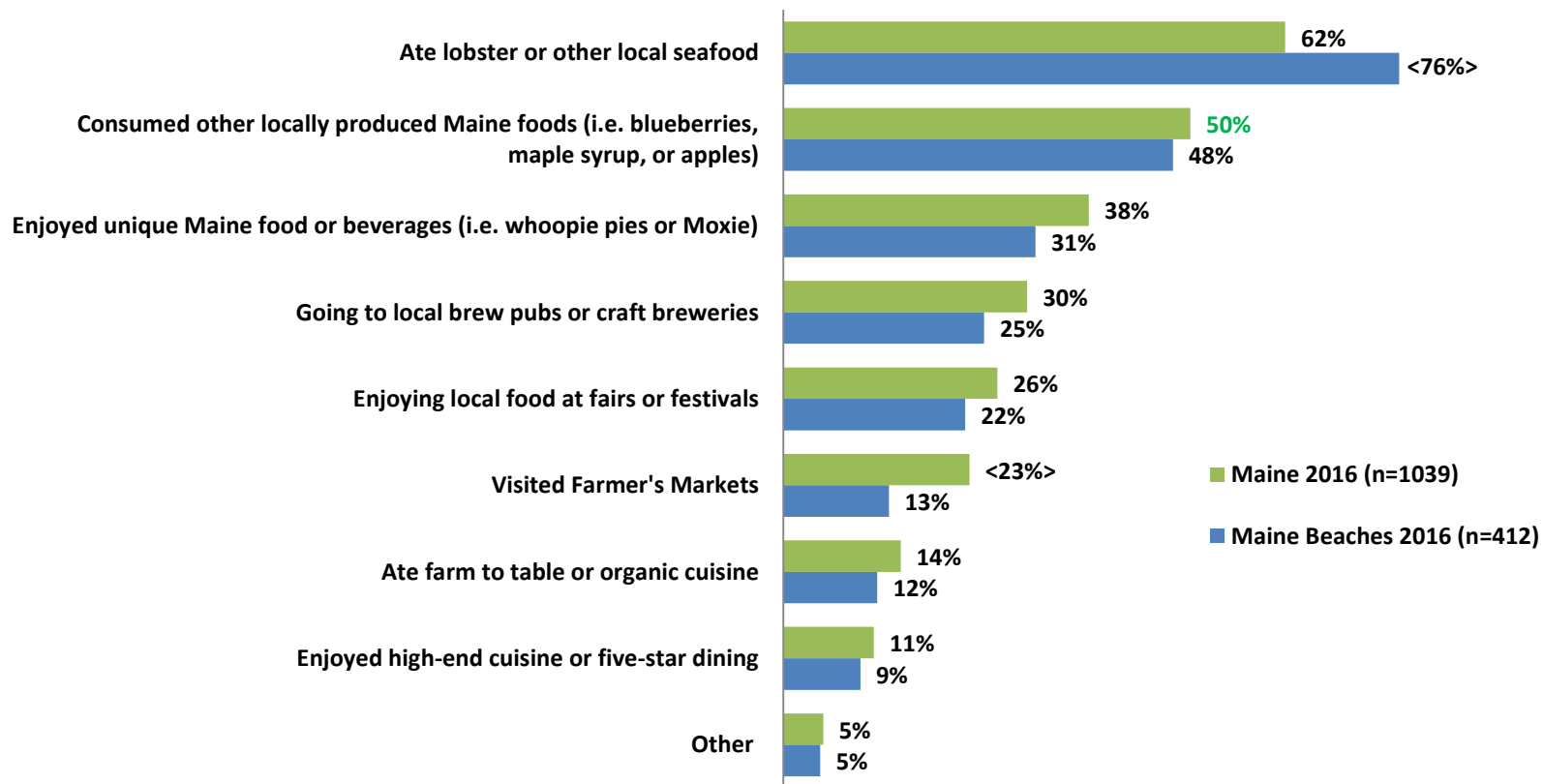
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*
 <> indicates a significant difference between subgroups at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in four day visitors interested in food/beverage/culinary activities *ate lobster or other local seafood* while visiting the region.

- A greater proportion of day visitors to this region *ate lobster/other local seafood* compared to all Maine day visitors, while a lesser proportion *visited Farmer's Markets*.

Food, Beverage, or Culinary Activities

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



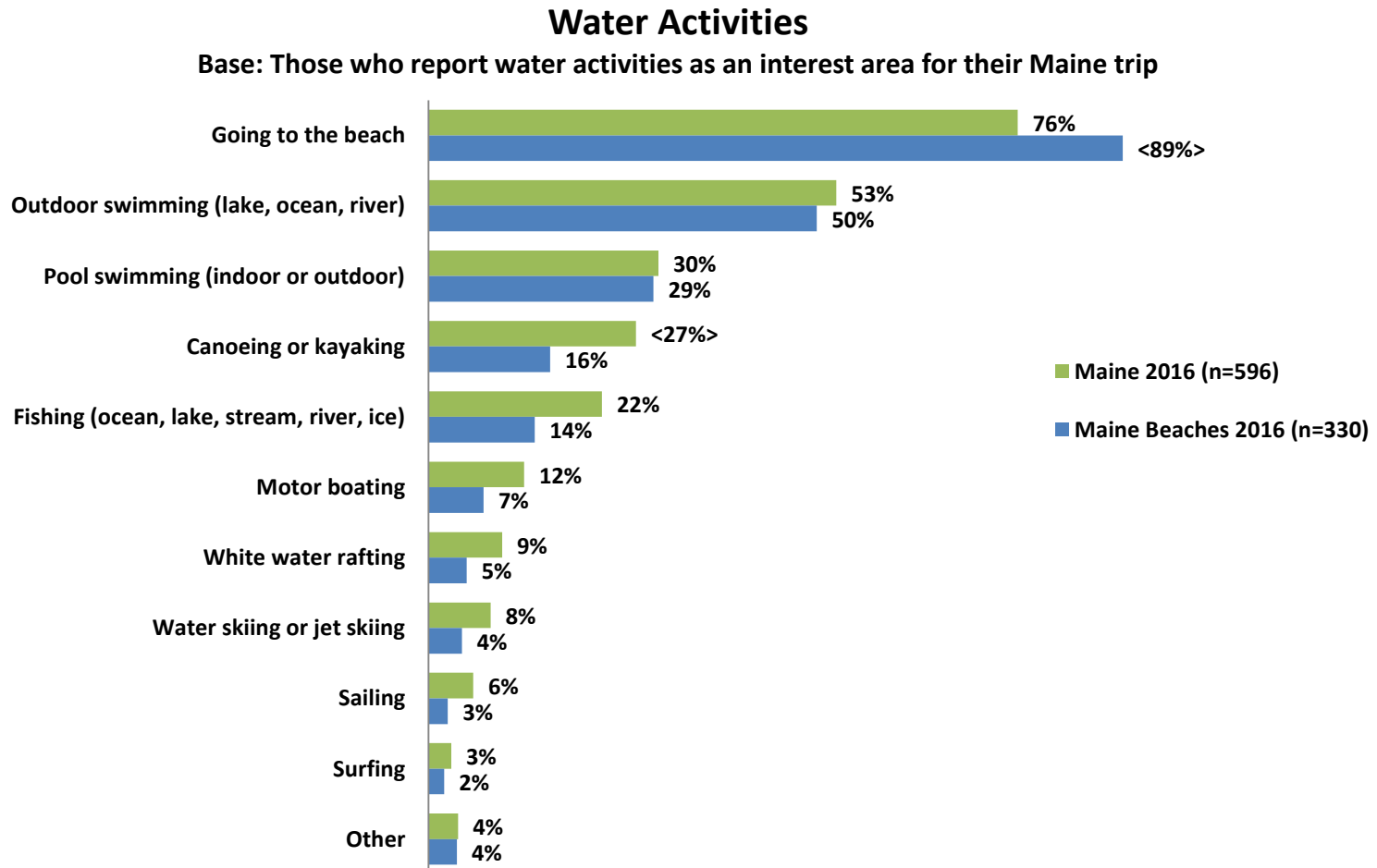
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

Nine in ten day visitors to the Maine Beaches region who are interested in water activities spent time *at the beach* while visiting.

- As expected, day visitors to the Maine Beaches region are more likely than day visitors to the State overall to spend time *at the beach*. Day visitors to this region are less likely to do some *canoeing or kayaking* while in the area.



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

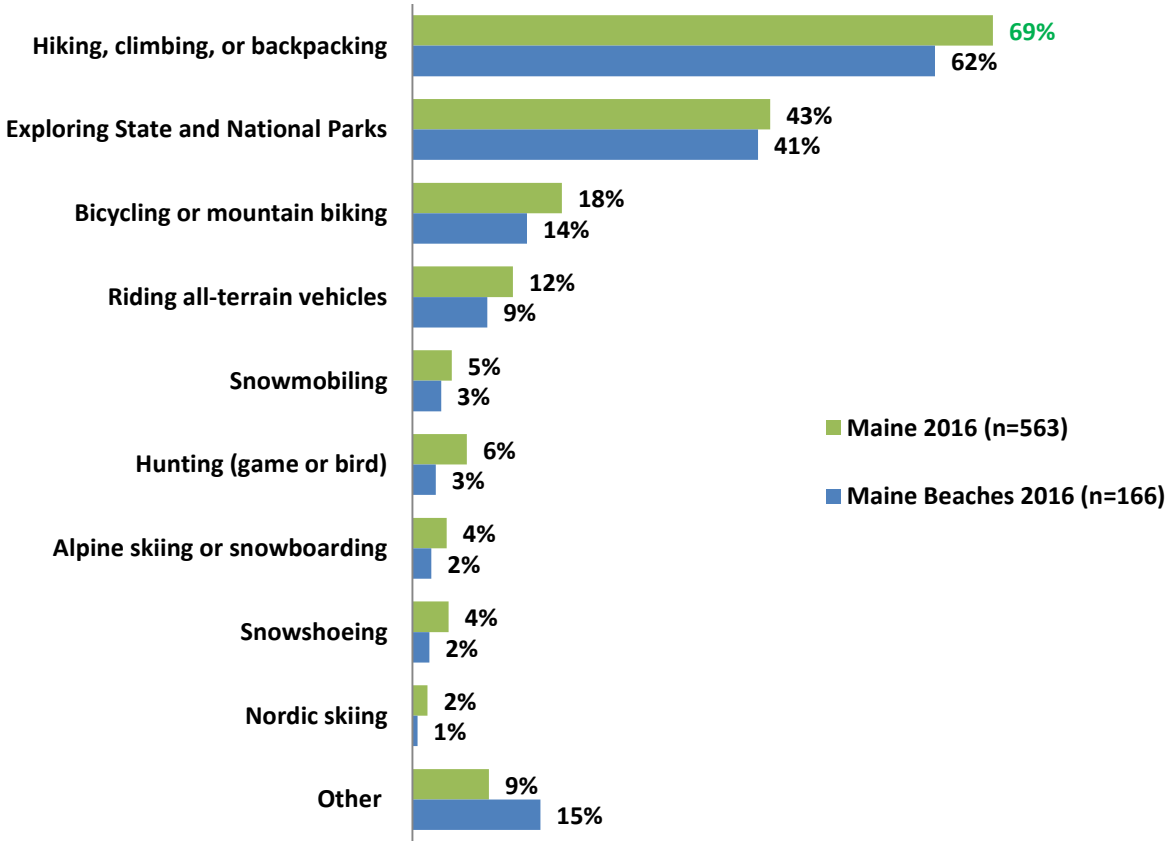
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Hiking/climbing/backpacking is the most common activity among day visitors interested in active, non-water outdoor activities.

Active Outdoor Activities – Non-Water

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



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

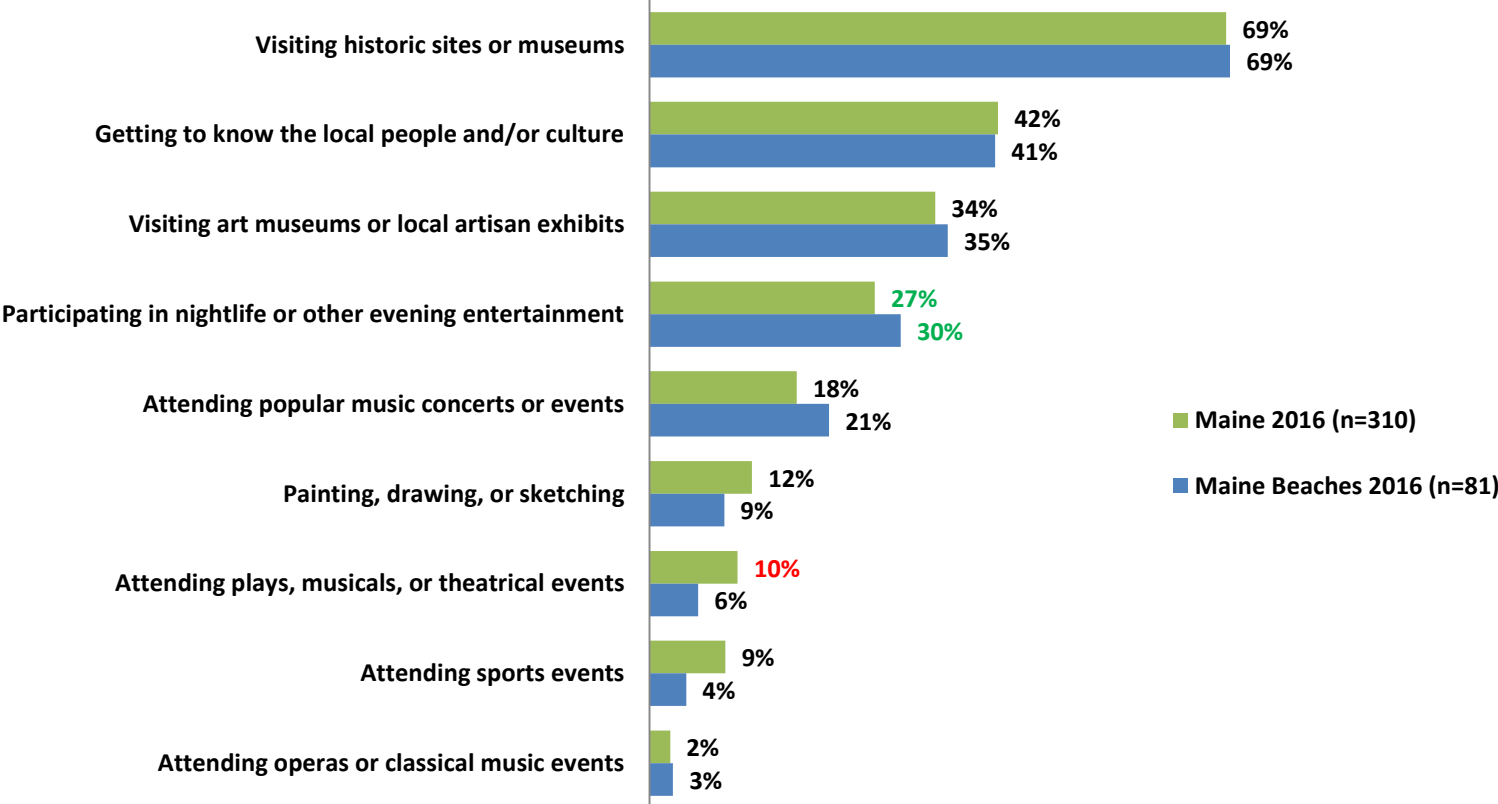
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The most common history or culture activity that day visitors to this region engage in is *visiting historic sites/museums*.

History or Culture Activities

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



Q20. 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.

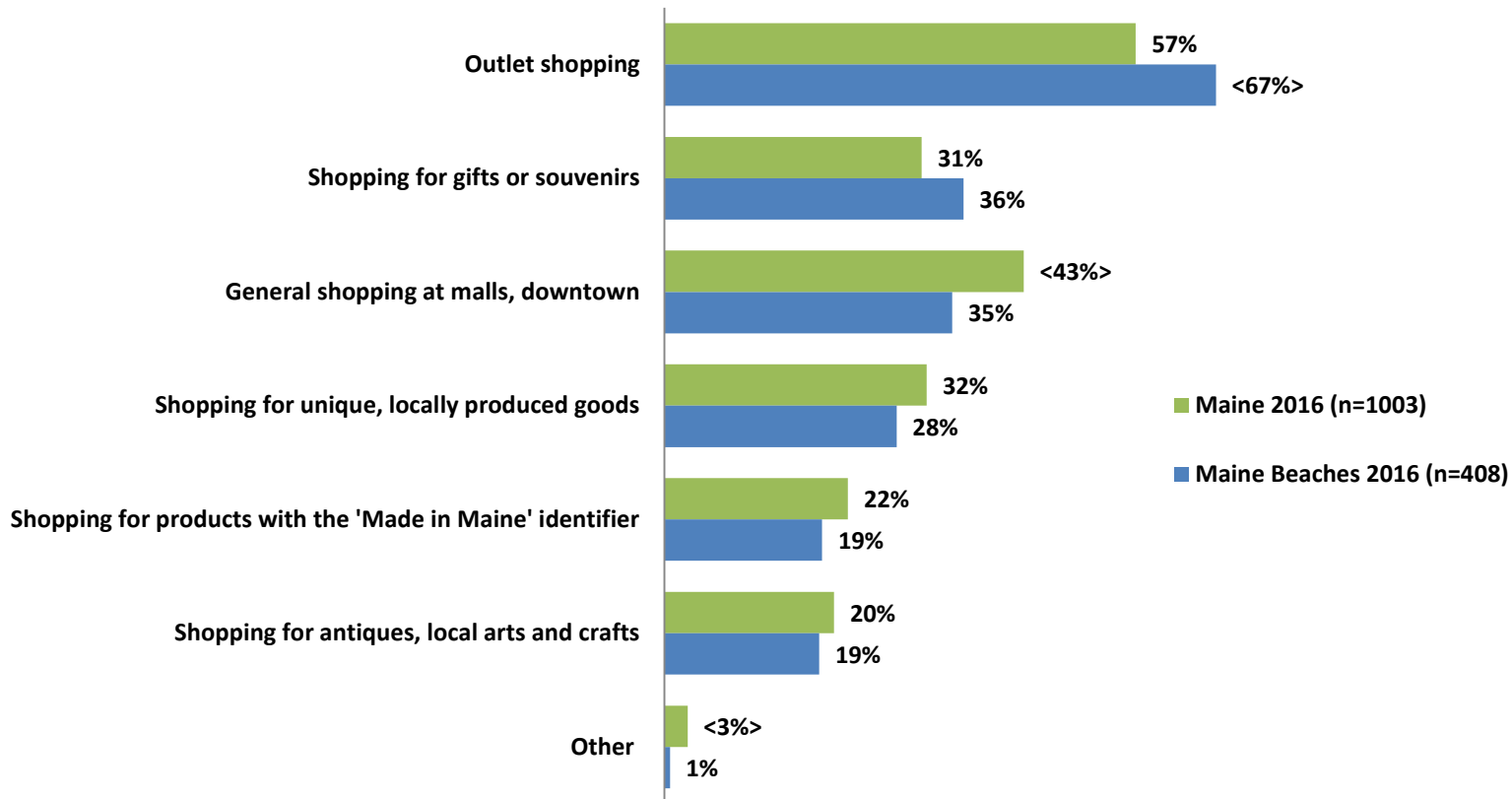
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two in three day visitors who are interested in shopping did some *outlet shopping* during their trip to the Maine Beaches.

- Maine Beaches day visitors are more likely to *shop at the outlets* and less likely to *shop at malls or downtown* compared to visitors to the State of Maine overall.

Shopping Activities

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

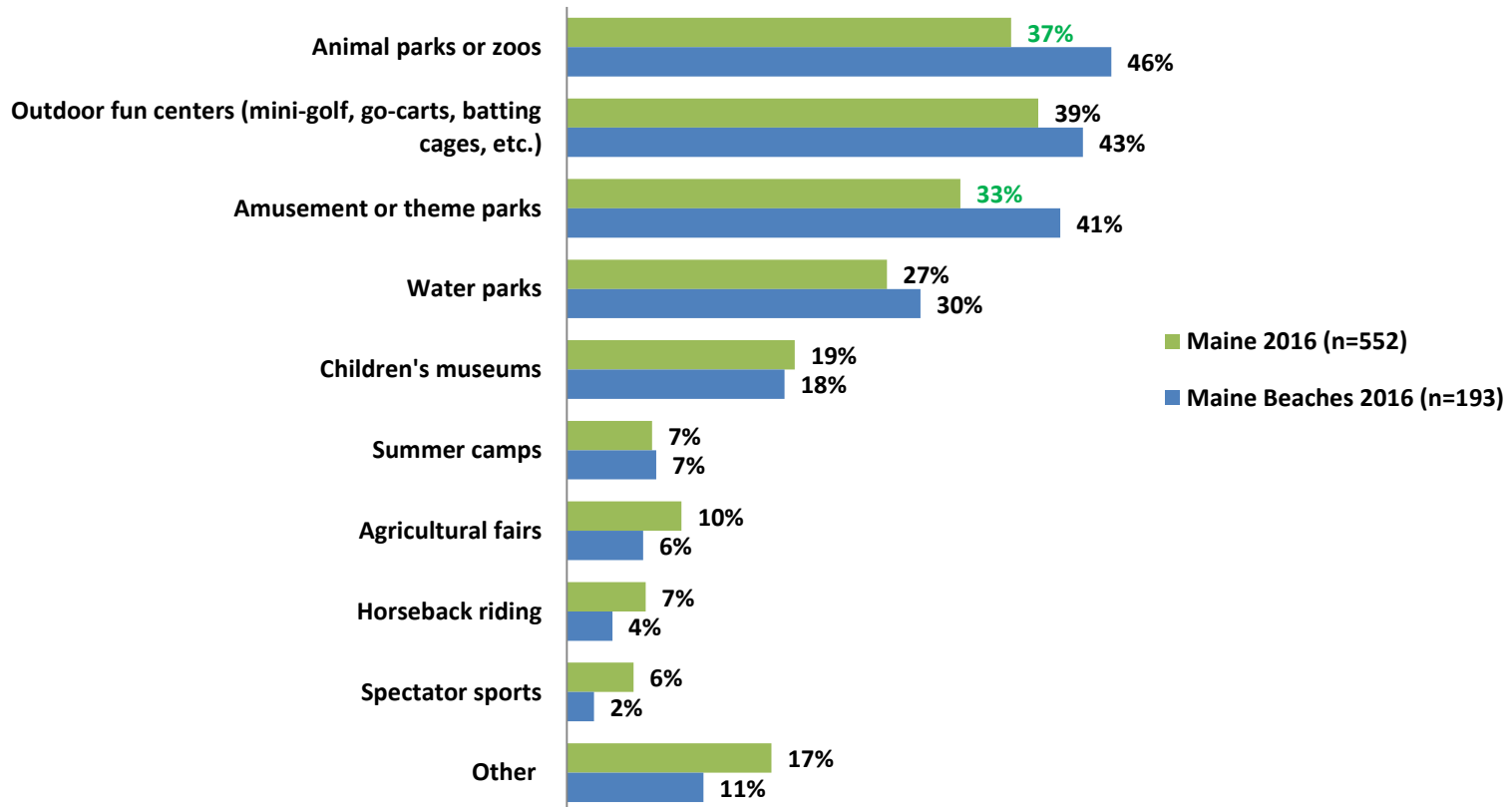
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Animal parks/zoos, outdoor fun centers, and amusement parks are the most common family fun/children's activities among day visitors to the Maine Beaches.

Family Fun/Children's Activities

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



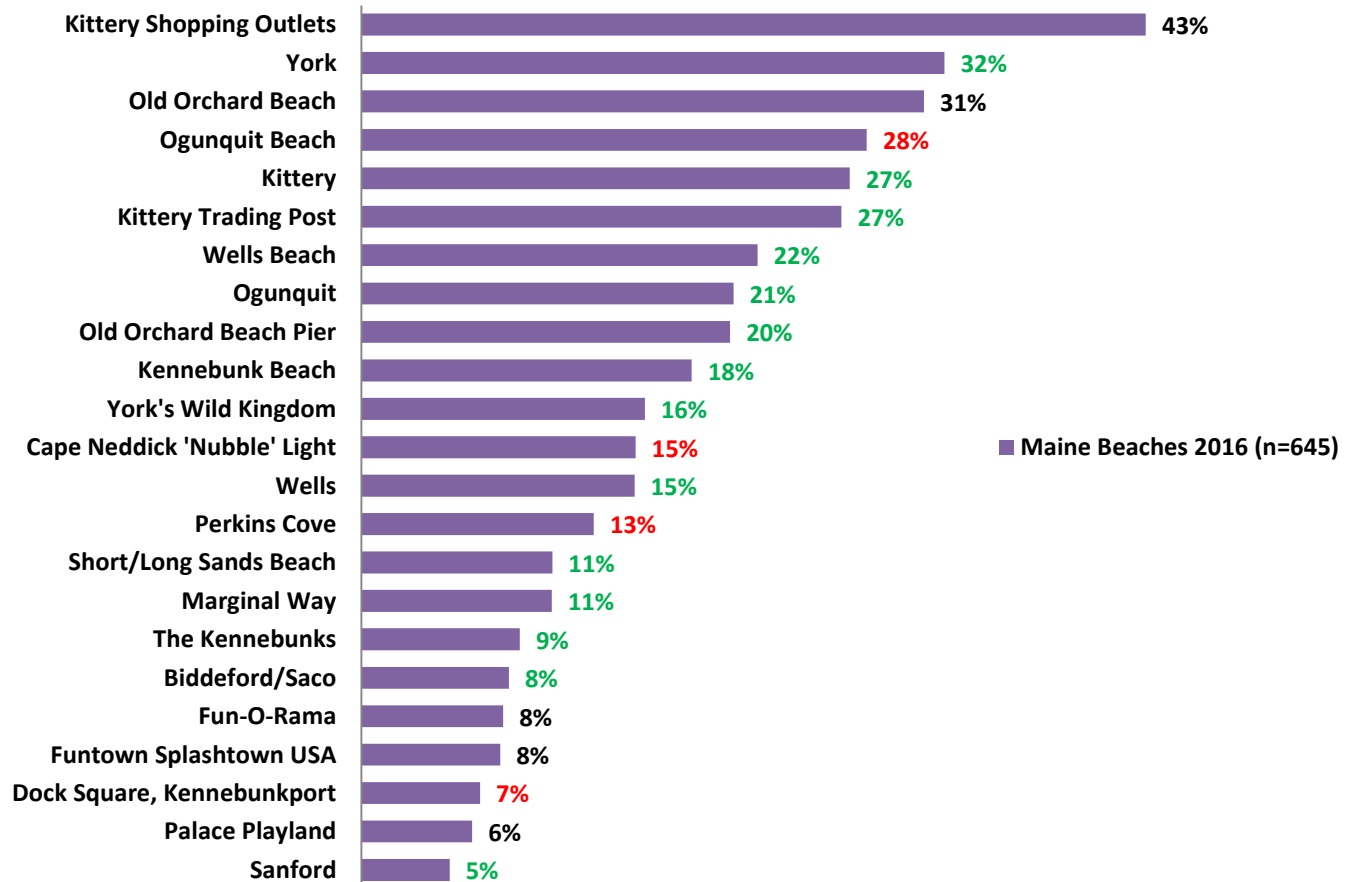
Q20. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

Two in five day visitors to the Maine Beaches region visit the *Kittery Shopping Outlets* while visiting the region.

Top Attractions/Locations Visited*



* Does not include response options selected by fewer than 5% of respondents.

Q24. Within the region you visited, what specific towns or cities did you visit?

<> 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.

Comparison of Maine Beaches Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Maine Beaches tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in:
 - Visitor demographics,
 - Visitor origin,
 - Areas of interest, and
 - The activities they participate in while visiting.
- Visitor origin can clearly be attributed to the location of the Maine Beaches region, in close proximity to Massachusetts. Popular trip activities closely follow the many shopping and beach activities available in the Maine Beaches region.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the entire State, Maine Beaches visitors differ in the following ways:

OVERNIGHT AND DAY VISITORS



A **greater** proportion of visitors from **New England**
(specifically, **MA**)



Visitor Demographics

OVERNIGHT VISITORS



Tend to be **older**
More likely to be **first-time**
visitors

DAY VISITORS



Higher annual household
incomes

Trip Interest Areas



Trip Interests and Importance (Travel Driver Index)



Trip Activities

OVERNIGHT AND DAY VISITORS

More likely to be:

- Enjoying the ocean views
- Eating lobster or other local seafood
- Going to the beach
- Outlet shopping

Less likely to be:

- Enjoying the mountain views
- General shopping (malls/downtown)
- Canoeing/kayaking
- Visiting Farmer's Markets

Trip Activities

OVERNIGHT VISITORS



Less likely to be:
Motor boating
White water rafting
Sailing
Attending summer camps
Horseback riding



Digital **Research** Group
DRI | CRITICAL **INSIGHTS** | dpa

Davidson-Peterson Associates
172 Commercial Street
Portland, ME 04101
207.985.7660
www.digitalresearch.com