

Maine Office of Tourism Mid-Coast Presentation

Prepared by



November 1, 2011

Introduction and Methodology



Introduction

- 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.
- This research program was designed to:
 - Profile Maine visitors in demographic terms as well as in their travel patterns;
 - Explore perceptions of Maine among visitors;
 - Understand why some travelers choose to visit Maine;
 - Describe both seasonal and regional visitation patterns of Maine visitors;
 - Explore what Maine visitors like and dislike about the locations in Maine they have visited; and
 - Estimate levels of spending in Maine by residents and non-resident visitors.

Visitor Data Collection

Research program occurs online on an ongoing basis, constantly asking travelers where they have visited in the last four weeks.

We gather data:

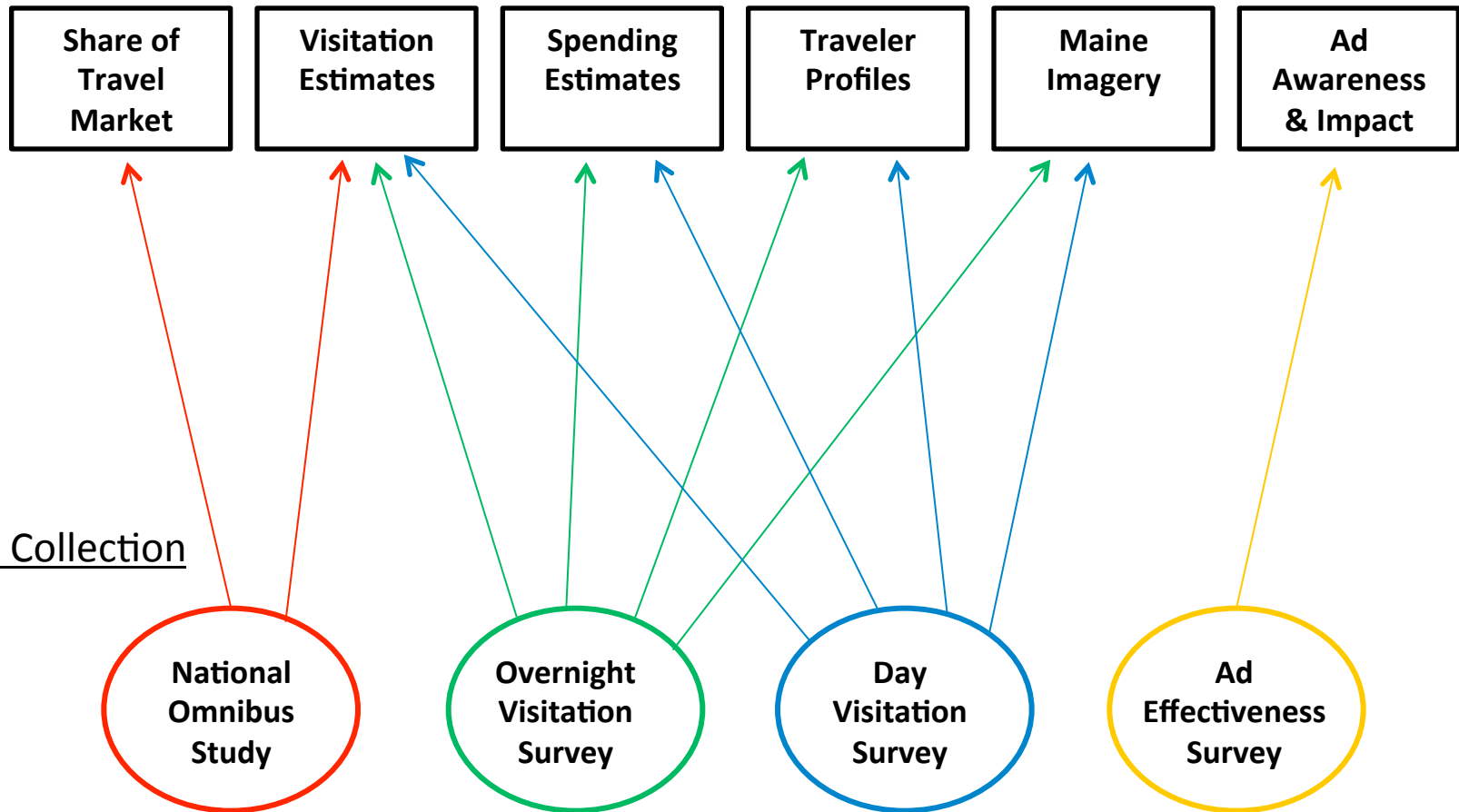
- Nationally – through an omnibus study of U.S. residents
- Regionally – among overnight travelers residing in Maine's core advertising markets (New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada) who have taken a trip to Maine in the last four weeks.
- Regionally – among day travelers living within a 100-mile radius of Maine's borders who have traveled to Maine within the last four weeks on a trip of at least 50 miles that is outside of their usual routine.

Data Collection Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the eRewards national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - **Regional Travel Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who 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; and
 - Used to determine the incidence of travel nationwide and Maine's share of that travel.
 - **Advertising Effectiveness Survey**
 - Samples residents of key geographies targeted by the Maine Office of Tourism advertising campaign.
 - Used to measure the awareness of, appeal of, and motivations from Maine Tourism print and television ads.

Research Methodology

Insights



Survey Content

- **Regional Travel Survey**

- **Overnight trip planning:** timeframe, information channels used, specific information sources, visitmaine.com usage and satisfaction, *Maine Invites You* usage
- **Overnight trip logistics:** primary/secondary destination, travel party, transportation, accommodations
- **Overnight trip profile:** primary purpose, activities conducted, category spending, towns visited, Maine Visitor Center usage
- **Overnight trip evaluation:** rating of Maine compared to other destinations, trip highlight, what could have been better on the trip, likelihood to return, likelihood to recommend, descriptions of Maine

- **Maine Day Visitor Survey**

- **Day trip logistics:** primary destination, travel party, transportation
- **Day trip profile:** primary purpose, activities conducted, category spending, towns visited, Maine Visitor Center usage
- **Day trip evaluation:** rating of Maine compared to other destinations, trip highlight, what could have been better on the trip, likelihood to return, likelihood to recommend, descriptions of Maine

Survey Content

- **National Omnibus Survey**
 - Number of U.S. trips taken in the past four weeks by trip type
 - Destination of trips by trip type
- **Advertising Effectiveness Survey**
 - Top-of-mind Northeastern U.S. leisure destinations
 - Attitudes towards travel
 - States visited, states likely to visit
 - Unaided tourism advertising awareness
 - Aided print & television ad recall
 - Aided print & television ad appeal
 - Aided print & television ad motivations
 - Intentions based on advertisements

Regional Insights: Mid-Coast



Overnight Leisure Visitor Demographics: *2009 Annual Report*

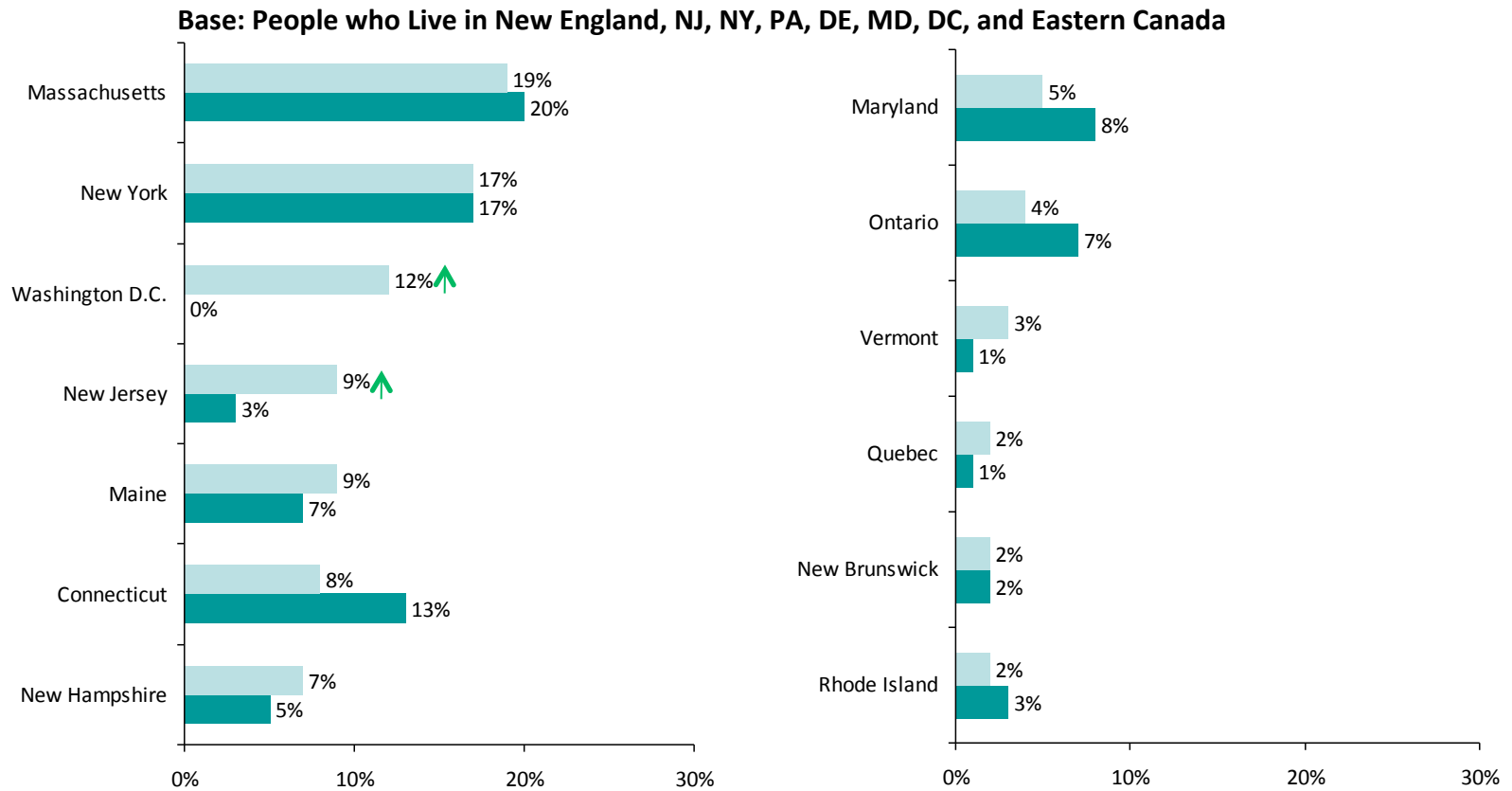
Mid-Coast

- The typical overnight leisure visitor to the Mid-Coast remains a highly educated, relatively affluent, married person in their mid-forties. This profile has changed little from 2008 to the same period in 2009. The one exception is that the average household income of this visitor saw a statistically significant year-over-year increase from 2008 to 2009.

	2008 (Base=215)	2009 (Base=187)
Mean Age	47.5	45.4
< 35	27%	26%
35 - 44	12%	24% ↑
45 - 54	19%	17%
55 +	42%	33%
Mean Income	\$101,300	\$113,000 ↑
< \$50,000	13%	15%
\$50,000 - \$99,000	38%	28%
\$100,000 +	40%	41%
Female	44%	39%
College Degree or Higher	81%	80%
Married	64%	65%
Employed Full Time	56%	68%

Overnight Leisure Visitor Residence: Mid-Coast

- Consistent with 2008, the largest percentage of overnight leisure visitors to the Mid-Coast are from Massachusetts or New York, each with just under one-fifth of these visitors. Interestingly, these states are followed by Washington D.C. and New Jersey, both of which saw statistically significant year-over-year increases in the percentage of overnight leisure visitors to the Mid-Coast from these states.

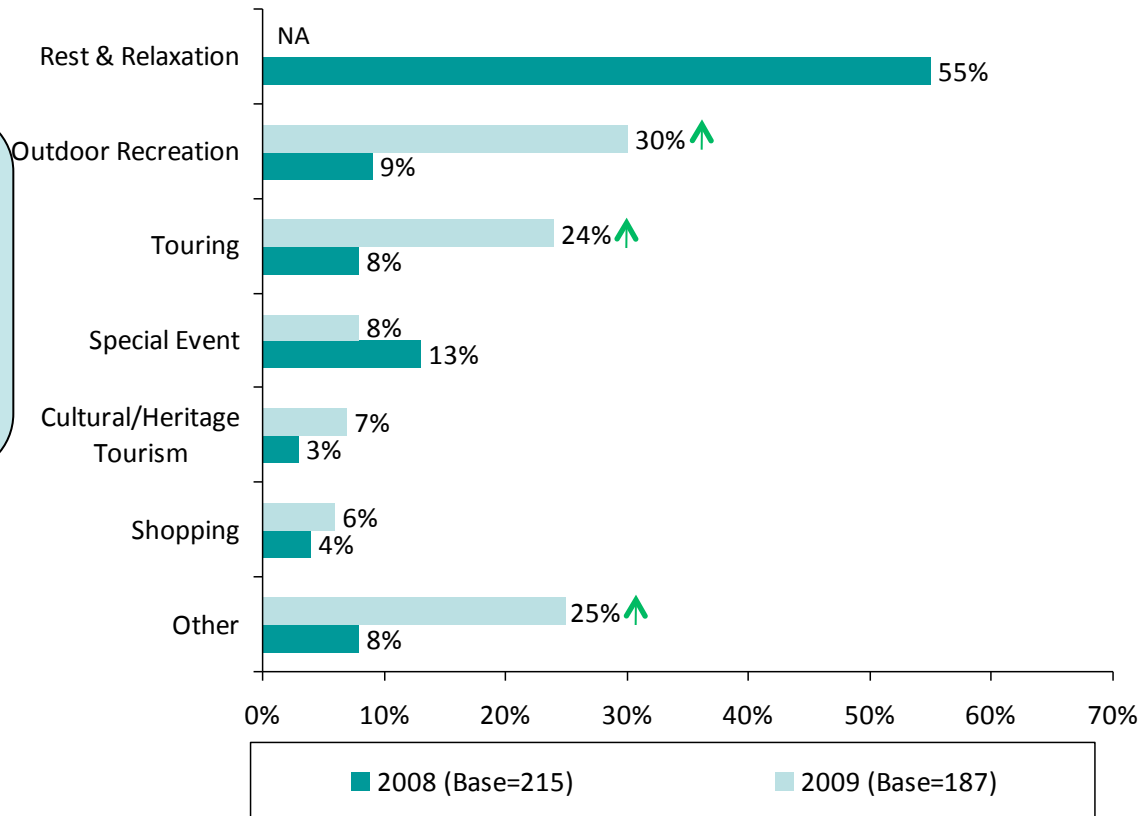


Primary Purpose of Overnight Leisure Trips: *Mid-Coast*

2009 Annual Report

- Unlike some of the other regions of Maine which have a single dominant primary trip purpose, there are several primary trip purposes that bring overnight leisure visitors to the Mid-Coast. For example, just under one-third of this group reported that they visit the region for outdoor recreation, while one-quarter said that they went to the Mid-Coast for touring. It's also worth noting the significant increase in the "Other" response. This is likely a function of removing the Rest & Relaxation answer option in 2009, which generated more than half of the responses for this region among these travelers in 2008.

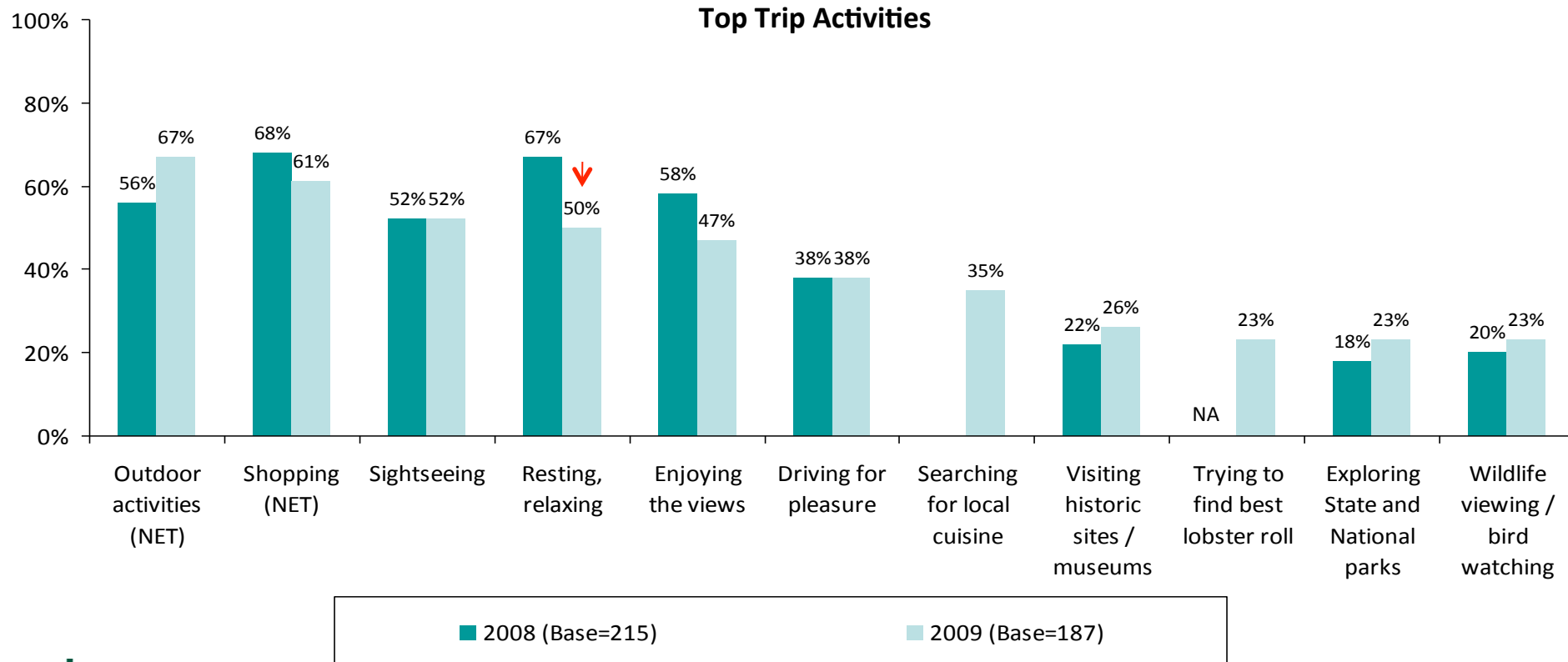
Primary Purpose of Overnight Leisure Trips



Please Note: *Rest & Relaxation* was not included in the 2009 survey. This helps to explain the significant year-over-year increases in other primary purpose categories on this chart.

Overnight Leisure Trip Activities: Mid-Coast

- Concurrent with the variety of primary trip purposes among overnight leisure visitors to the Mid-Coast, the chart below illustrates how there are several trip activities that these visitors engage in during their visits. For example, outdoor recreation, shopping, sightseeing, resting, and enjoying the views were cited by around half or more of overnight visitors to this region as activities that they conducted during their trip to the Mid-Coast.

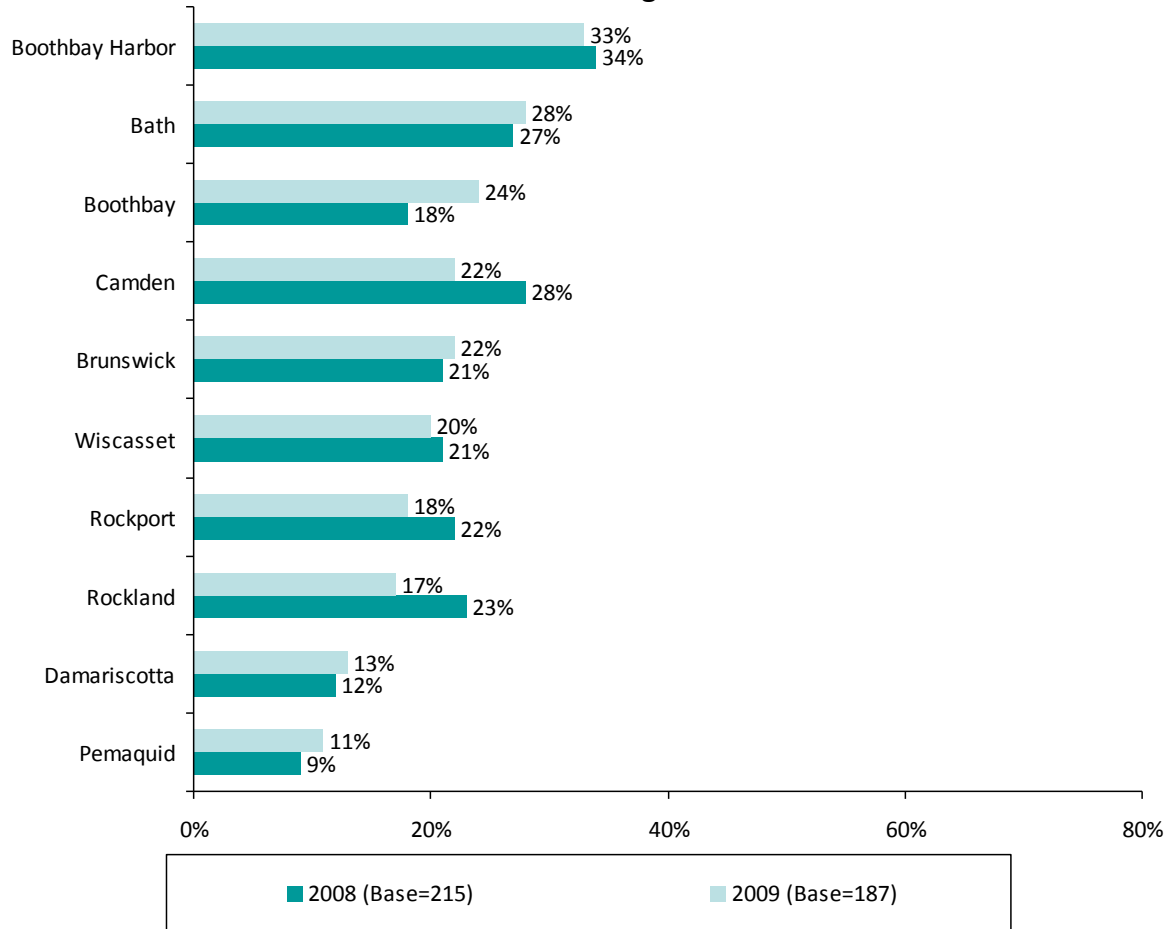


Overnight Leisure Visitor Towns & Cities Visited: *Mid-Coast*

2009 Annual Report

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

Percent of visitors to region



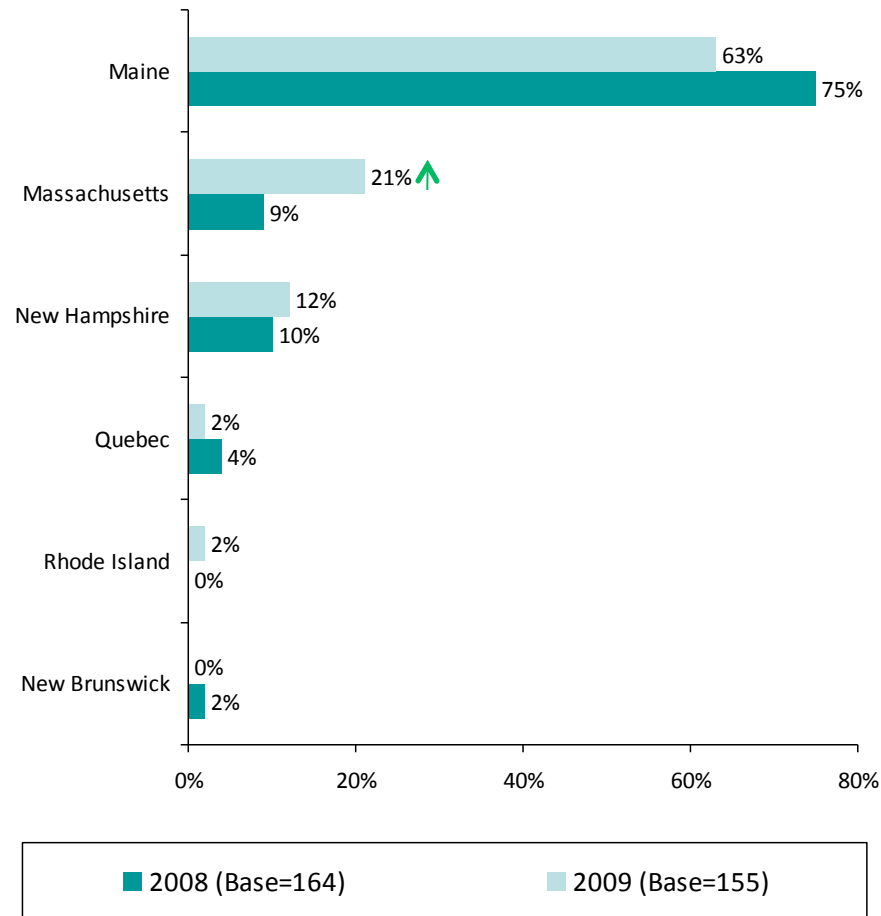
Day Leisure Visitor Demographics: *Mid-Coast*

- The demographic profile of day leisure visitors to the Mid-Coast remained largely statistically stable between 2008 and 2009. The two exceptions to this both relate to age, where there was a significant decrease in the percentage of leisure day visitors to this region between age 35-44 and a significant increase of day leisure visitors to this region age 55 and over.

	2008 (Base=164)	2009 (Base=155)
Mean Age	47.1	50.2
< 35	20%	21%
35 - 44	25%	13% ▼
45 - 54	20%	15%
55 +	32%	51% ▲
Mean Income	\$82,700	\$76,000
< \$50,000	18%	28%
\$50,000 - \$99,000	55%	55%
\$100,000 +	26%	18%
Female	48%	47%
College Degree or Higher	76%	65%
Married	69%	66%
Employed Full Time	51%	52%

Day Leisure Visitor Residence: Mid-Coast

- Nearly two-thirds of leisure day visitors to the Mid-Coast are Maine residents. It's also notable that there was a significant year-over-year increase in the percentage of leisure day visitors to the Mid-Coast from Massachusetts, making this the second largest residence group of leisure day visitors to this region.

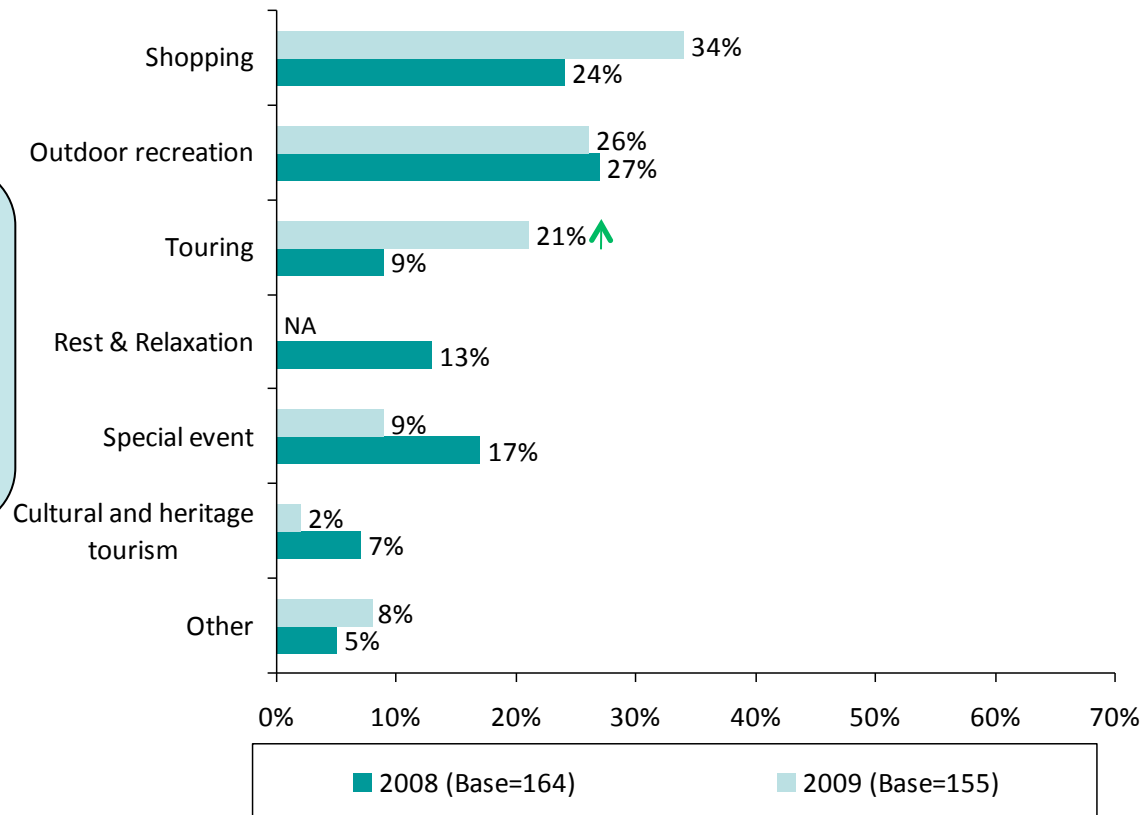


Day Q1A. In what State or Province do you reside?

Primary Purpose of Day Leisure Trips: Mid-Coast

- Day leisure visitors to the Mid-Coast are relatively split between several primary trip purposes. One-third of this group report that their leisure day visit to the region was to shop, while one-quarter report that it was for outdoor recreation, and one-fifth said it was to go touring. This illustrates the wide variety of attractions in the Mid-Coast for leisure day visitors.

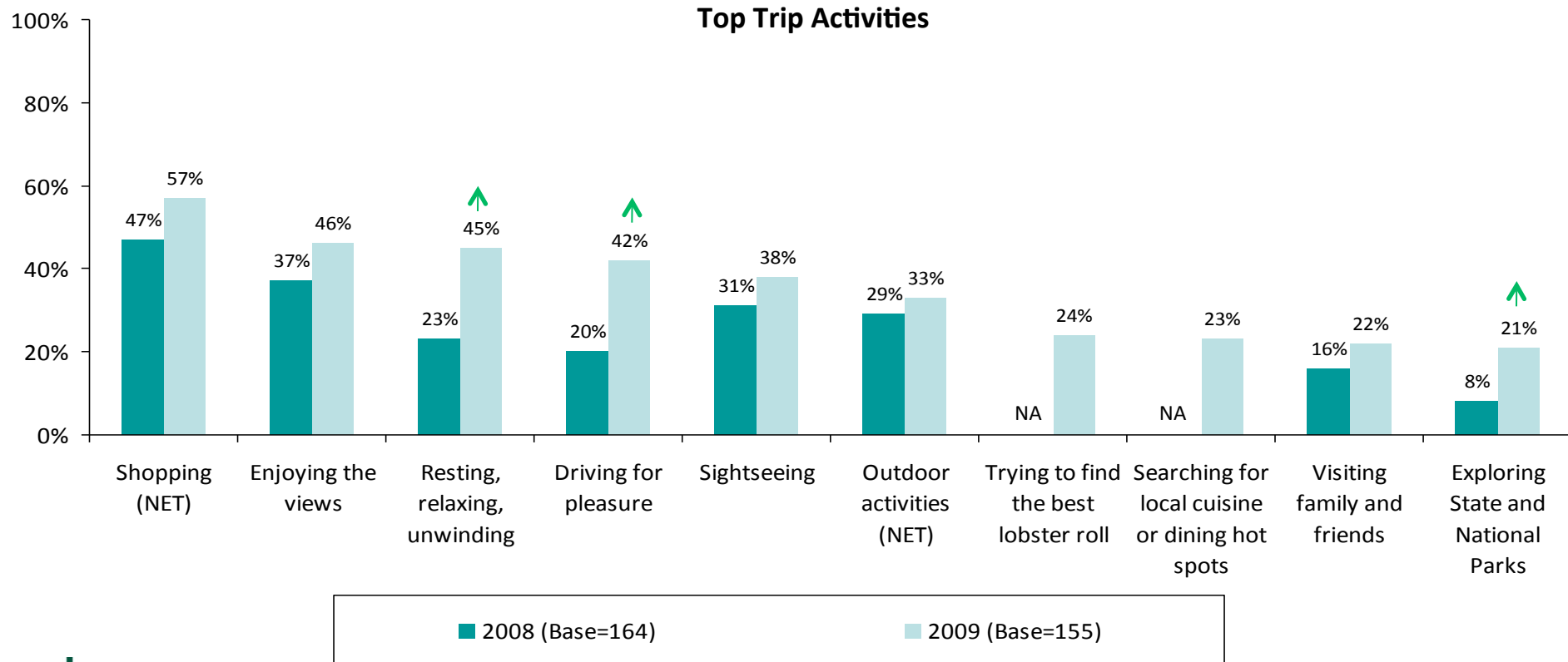
Primary Purpose of Day Leisure Trips



Please Note: *Rest & Relaxation* was not included in the 2009 survey. This helps to explain the significant year-over-year increases in other primary purpose categories on this chart.

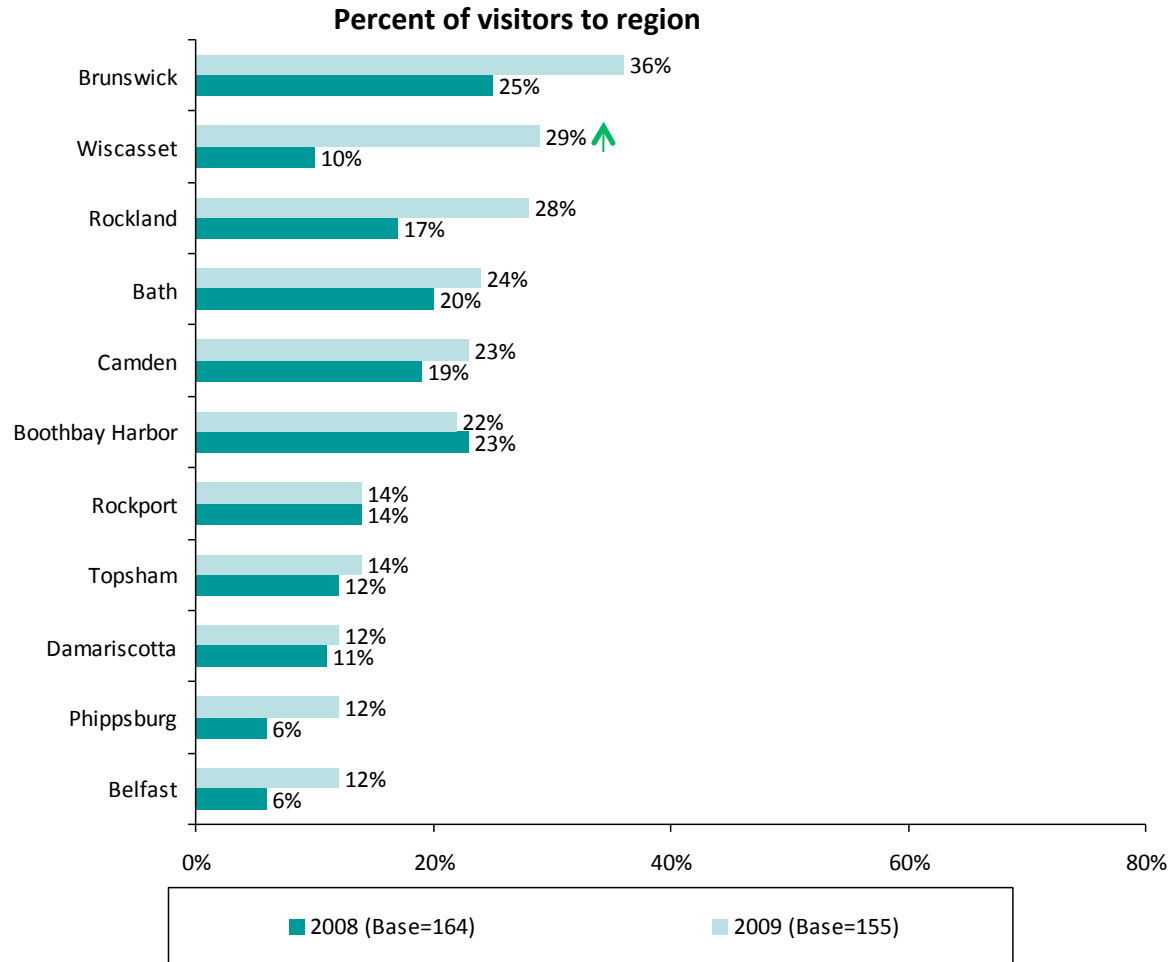
Day Leisure Trip Activities: Mid-Coast

- In accordance with the previous slide, there is not one dominant activity conducted by leisure day visitors to the Mid-Coast. Instead, just over half of this group reported that they went shopping, while enjoying the views, resting, and driving for pleasure were all cited by slightly less than half of this group. It's also important to note that resting, driving for pleasure, and exploring State and National Parks all saw statistical year-over-year increases in the percent of this group who conducted them during their visits.



Day Leisure Visitor Towns & Cities Visited: *2009 Annual Report* Mid-Coast

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





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