

**Maine Office of Tourism
Visitor Tracking Research
2012 Calendar Year Annual Report**

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

Prepared by



April 2013

Introduction 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 the *ResearchNow* 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.

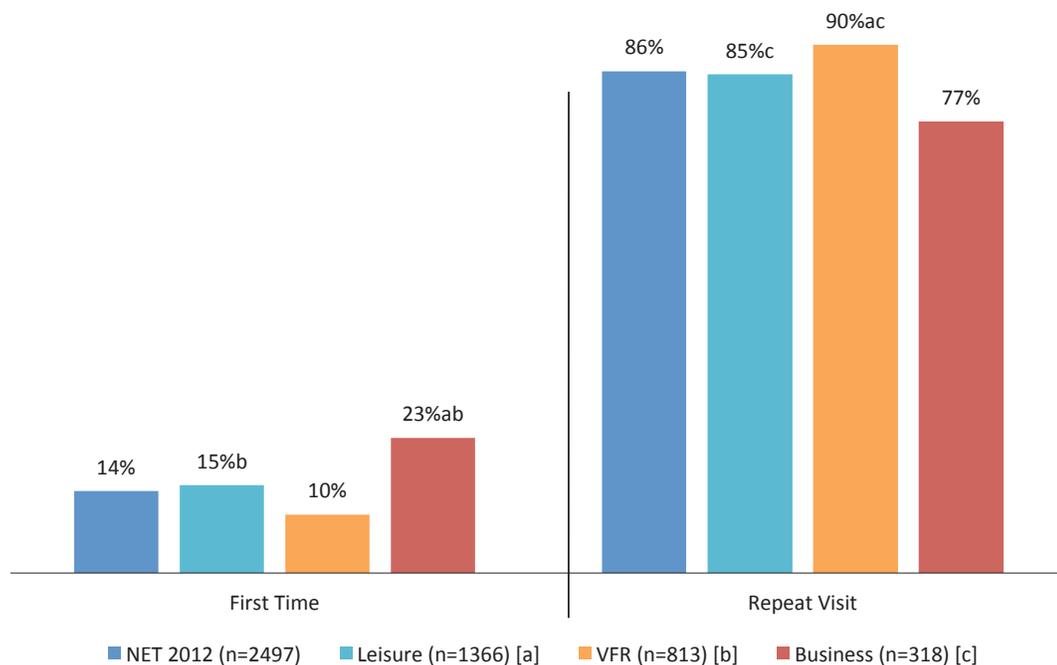
- This report outlines results from calendar year 2012, with travel occurring between January 2012 and December 2012, and highlights the **differences between first-time and repeat visitors to Maine.**
- Data was collected between January 1st and December 15th 2012. The number of completed statewide surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,497
 - Maine Day Visitor – 1,520
 - National Omnibus Survey – 17,722

Baseline Overnight Visitor Statistics



Overnight Visitor Trip Type

- Fewer than one-in-six visitors to the state are first time visitors. Though the proportion of first-time visitors had dropped from 17% in 2010 to 14% in 2011, this proportion remains at 14% for 2012.
- Business travelers are more likely to be visiting Maine for the first time, while leisure travelers and those visiting friends and relatives are more likely to be repeat visitors to the State.



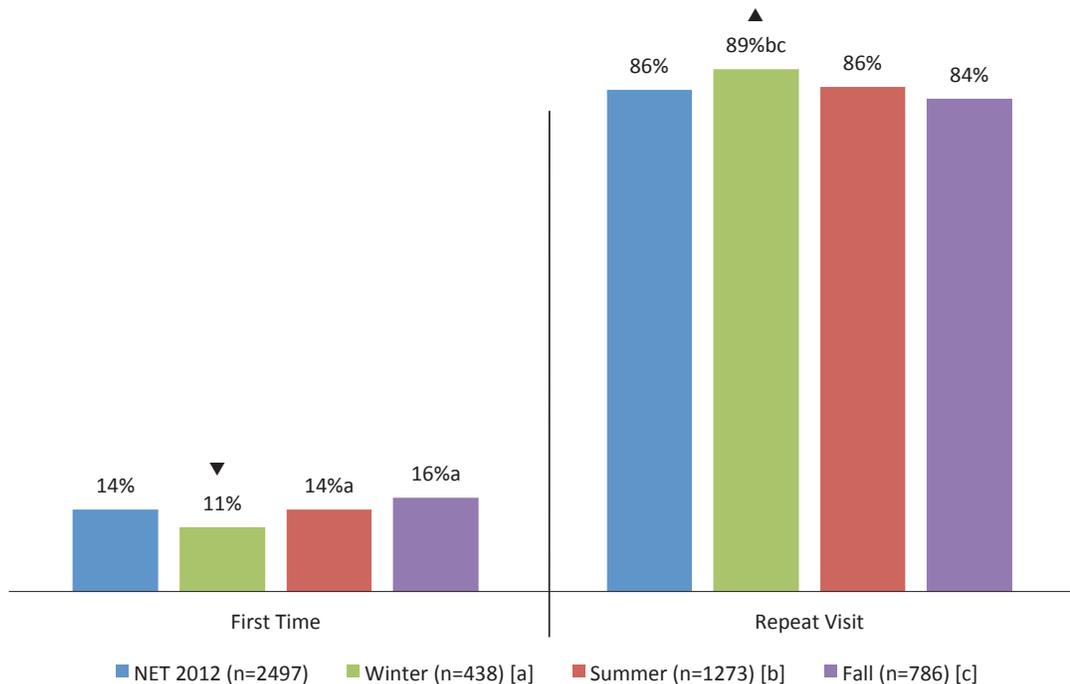
Regional Q9. Was this your first visit in Maine?

a, b, c indicates significant difference at the 95% confidence level

▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level

Repeat versus First Time Visitors by Season

- 2012 saw a greater proportion of repeat visitors during the Winter season, as compared to the Fall and Summer seasons. The proportion of repeat visitors during the Winter is also higher than in 2011, suggesting a more loyal Maine visitor during the Winter season.



Regional Q9. Was this your first visit in Maine?

a, b, c indicates significant difference at the 95% confidence level

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Overnight Visitor Demographics

- Overall, the demographic profile of first-time and repeat overnight leisure visitors to Maine is similar. One exception is that first time visitors are younger than those who have visited Maine on a repeat basis, and less likely to be married.

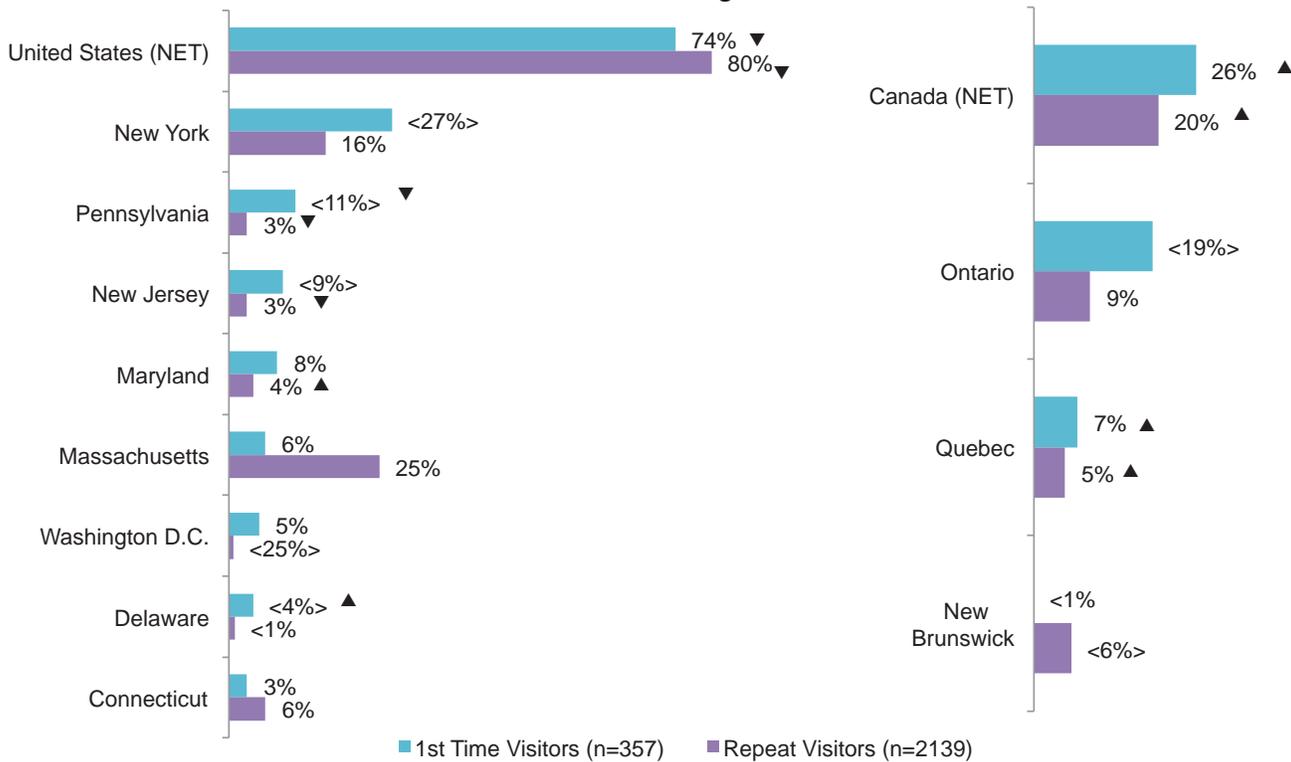
2012 Overnight Visitors	1st Time (n=357)	Repeat (n=2139)
Age:		
< 35	<54%>	21%
35 - 44	20%	17%
45 - 54	13%	<22%>
55 +	13%	<40%>
Mean Age	38.0	<48.9>
Income:		
< \$50,000	16%	10%
\$50,000 - \$99,000	28%	33%
\$100,000 +	42%	43%
Mean Income (In Thousands)	\$109.25	\$114.36
Female	47%	48%
College Degree or Higher	82%	80%
Married	52%	<62%>
Employed Full Time	67%	61%

<> indicates significant difference at the 95% confidence level

Overnight Visitor Residence

- Not surprisingly, first time visitors to Maine are more likely to come from the mid-Atlantic states as opposed to closer in New England states. Repeat visitors are more likely to come from the neighboring state of Massachusetts.
- Among Canadian overnight leisure visitors to Maine, repeat visitors are more likely to come from the neighboring province of New Brunswick.

Base: Overnight Visitors



State/Province of residence.

<> indicates significant difference at the 95% confidence level

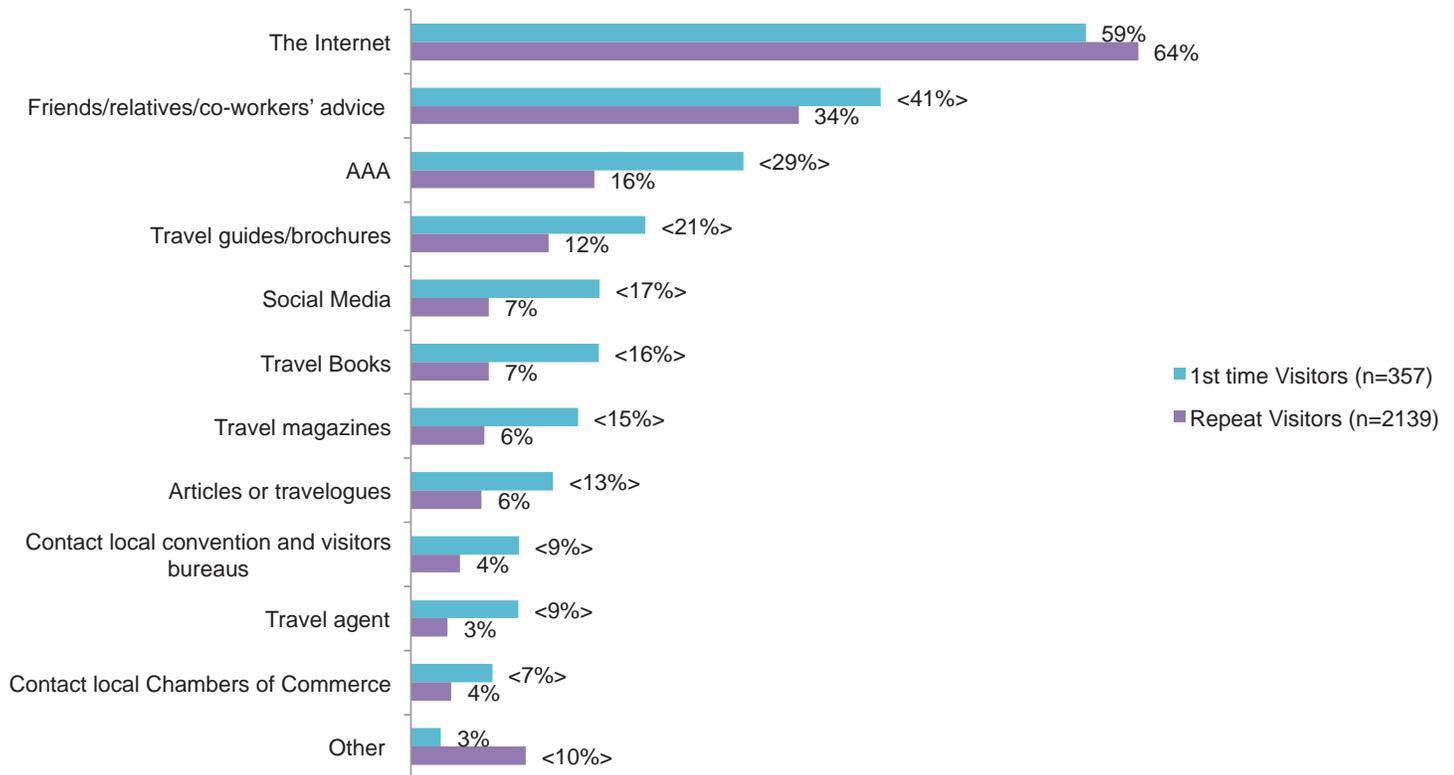
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Overnight Trip Planning



Trip Planning Sources

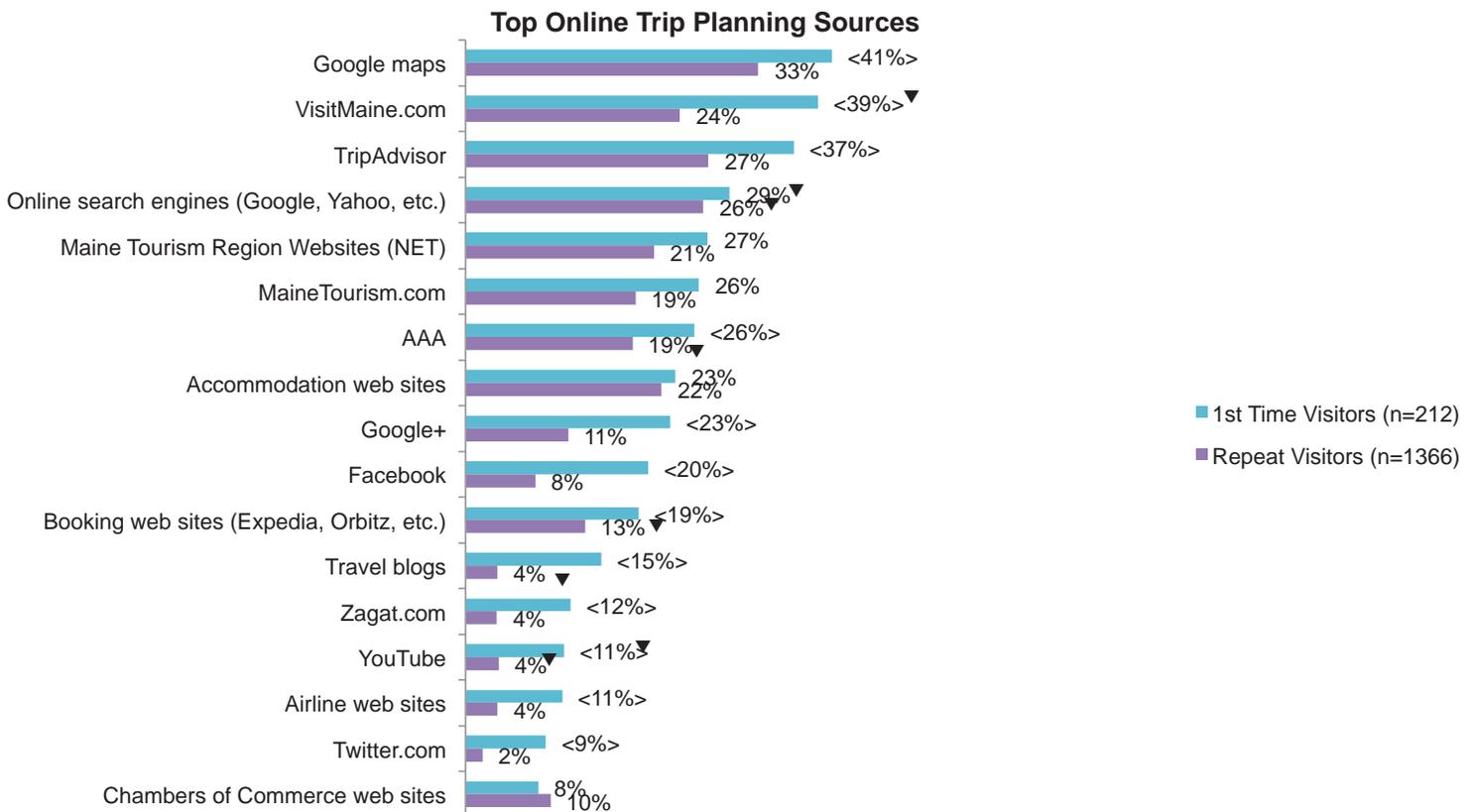
- First time visitors are much more active in using various sources to help plan their overnight trips to Maine.
- While first time visitors are about as likely as repeat visitors to use the Internet in their planning, they use a wider variety of planning tools more frequently.



Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?
<> indicates significant difference at the 95% confidence level

Online Trip Planning Sources

- Importantly, first time visitors are more likely than repeat visitors to have visited the state tourism website (VisitMaine.com) while planning their first trip to Maine. As with other trip planning sources, most online planning sources were more widely used by first-time visitors than repeat visitors.



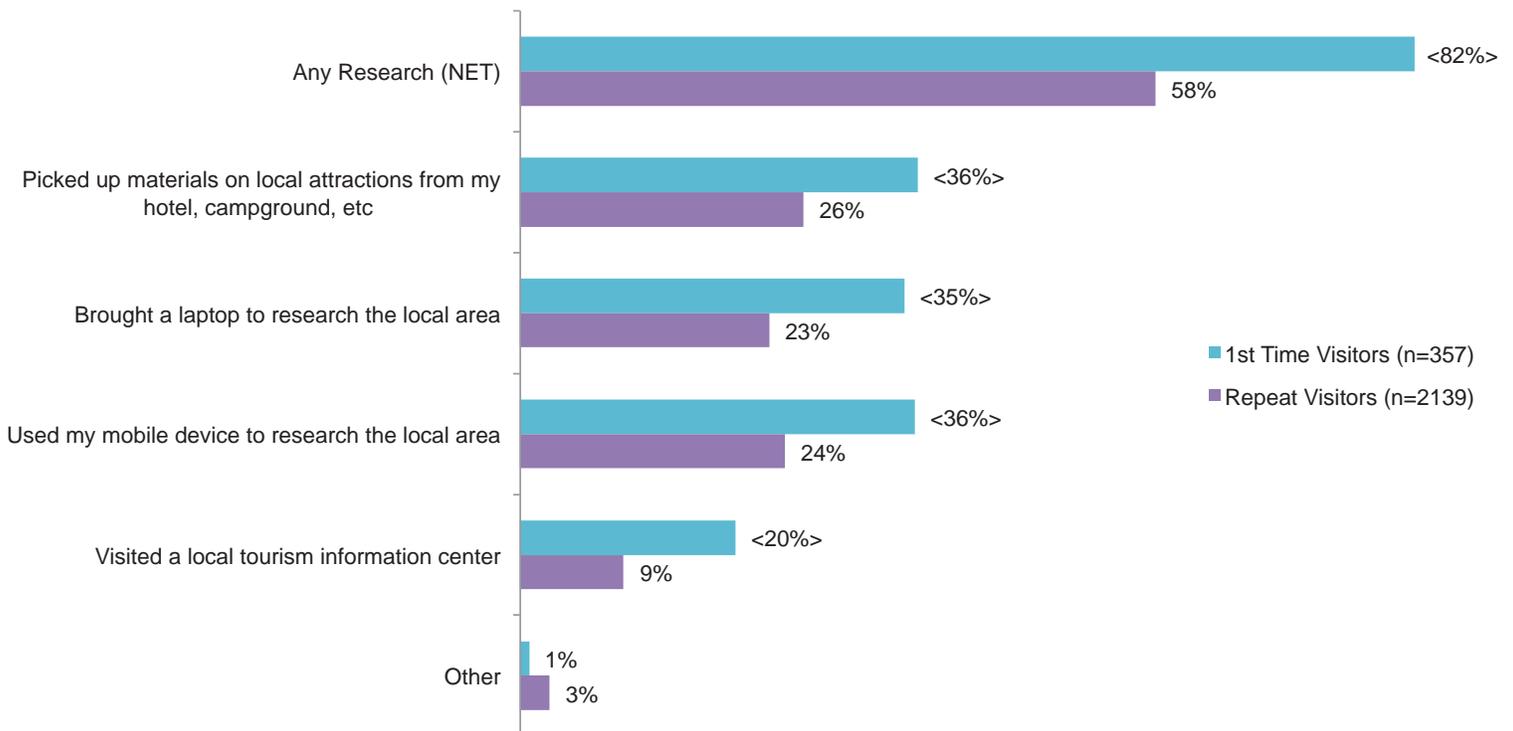
Regional Q18. Which of the following web sites did you visit when planning this trip in Maine?

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Trip Research While in Maine

- Perhaps due to having less familiarity with the state of Maine, first time visitors are more likely to continue to research places to go and things to do during their visit. This includes utilizing a variety of techniques, from picking up hard copy materials and visiting tourism information centers, to using their laptops and mobile devices to gather information electronically.



Regional Q31d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?

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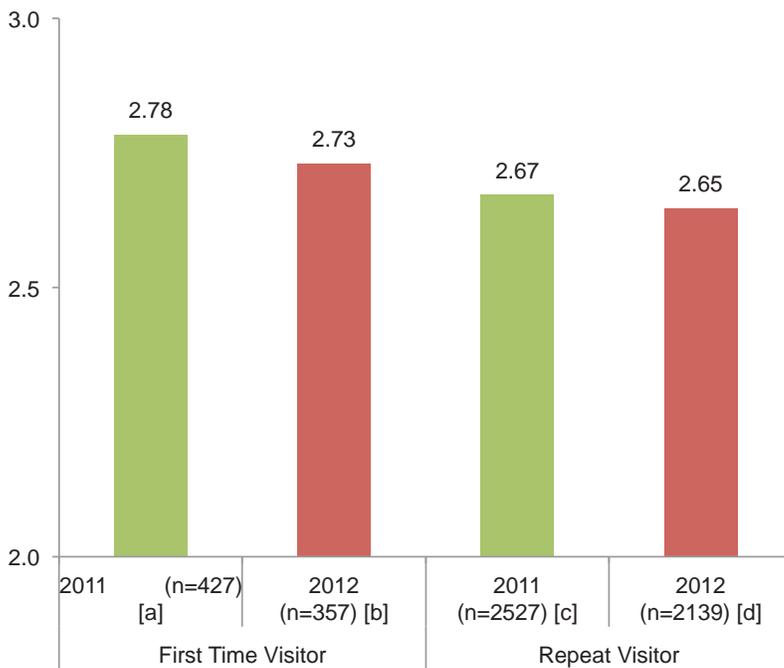
Overnight Visitor Travel Logistics



Travel Party Size and Composition

- Travel party size is similar between first time and repeat visitors. First-time visitors are slightly more likely to be traveling with children than are repeat visitors.

Mean Number of People in Travel Party



Percent Traveling with Children



Regional Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

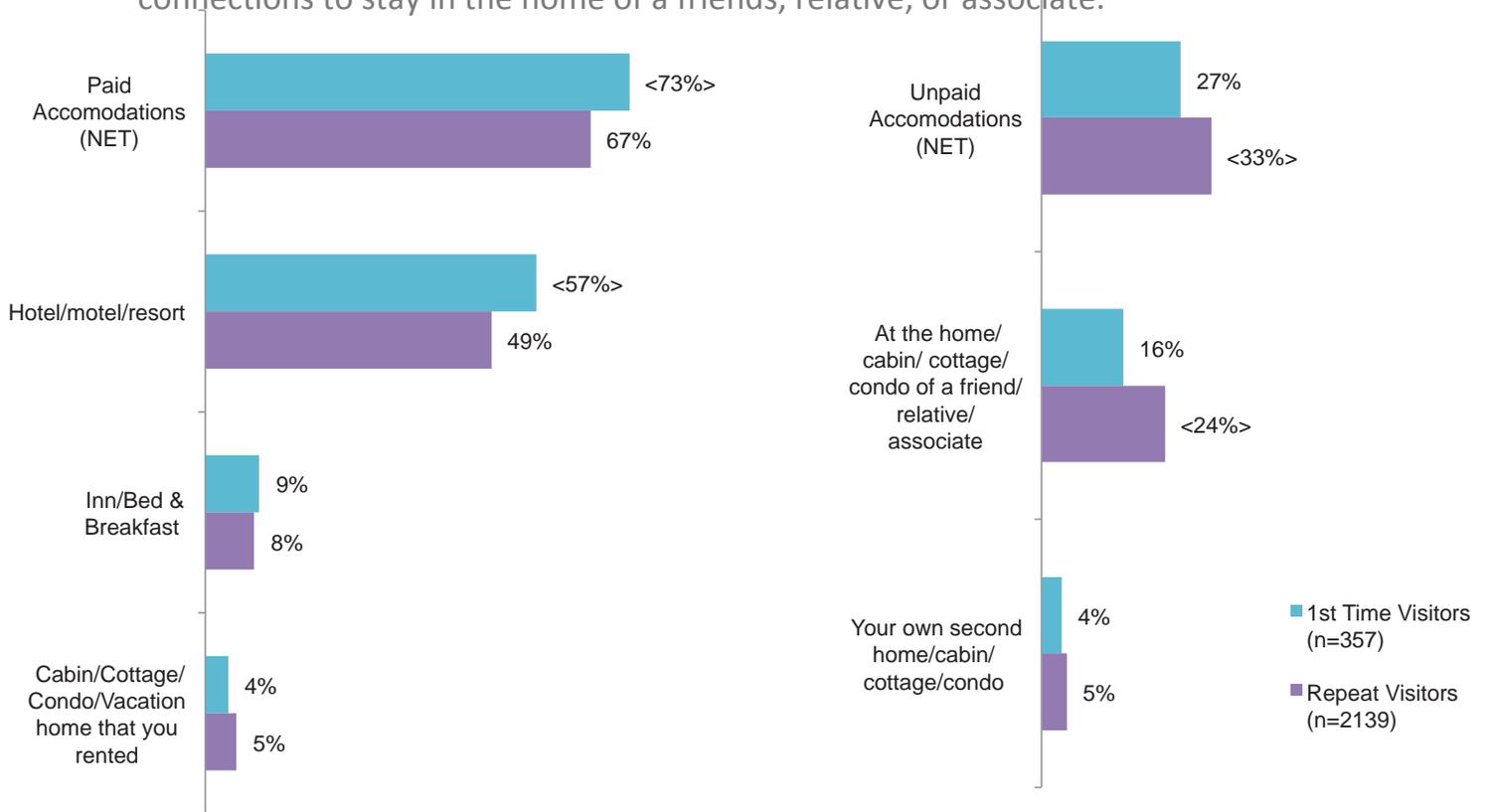
Regional Q25. How many of these people were: Children?

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Accommodations While in Maine

- First time visitors are more likely to spend money on paid accommodations, specifically to stay in a hotel, motel, or resort. Conversely, first time visitors to Maine are less likely than repeat visitors to stay in unpaid accommodations, perhaps having fewer connections to stay in the home of a friends, relative, or associate.



Regional Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

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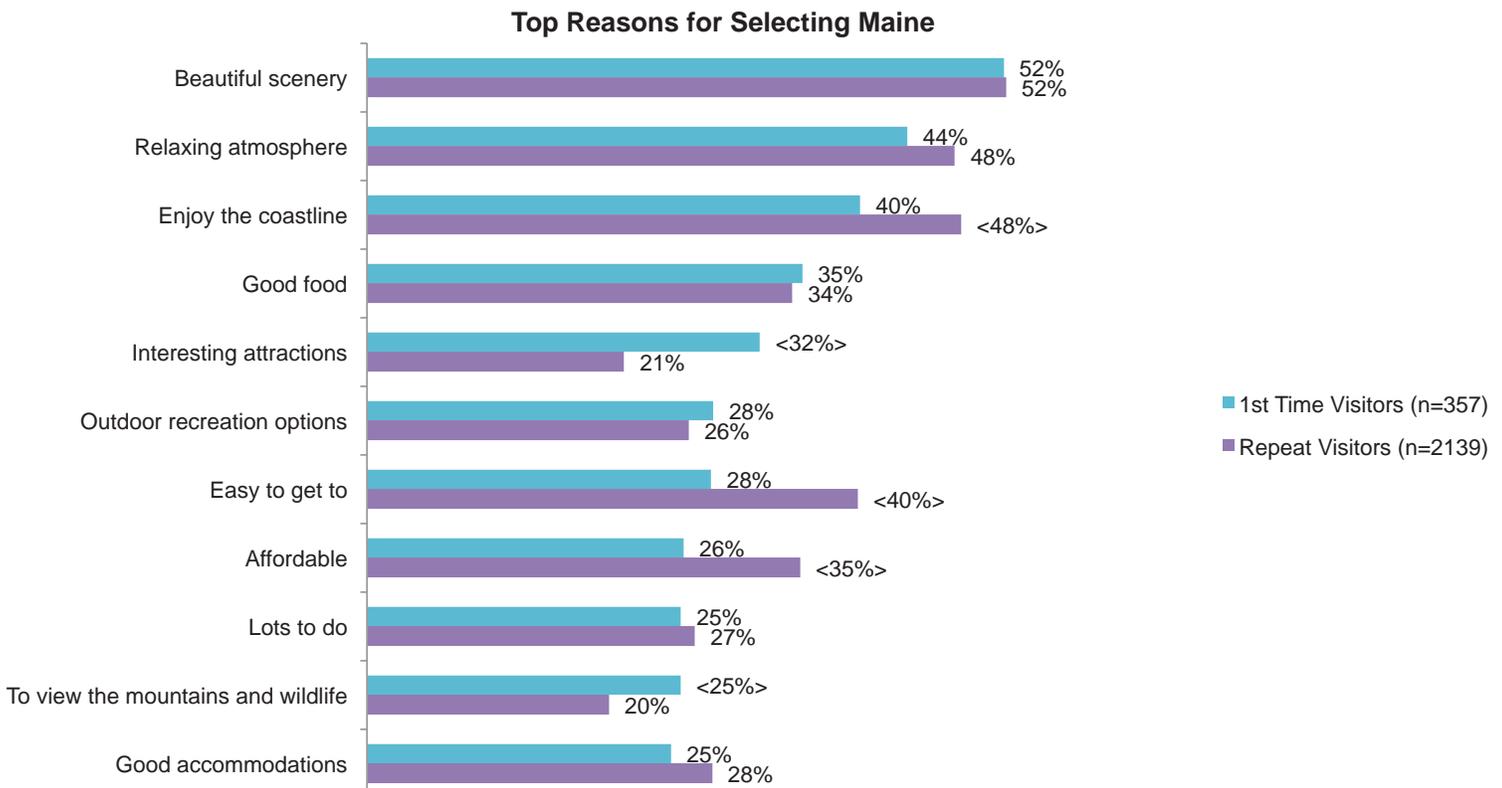
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Overnight Visitor Experience



Reasons for Selecting Maine

- While repeat visitors are more likely to select Maine as their destination to *enjoy the coastline* or because it's *easy to get to* and *affordable*, first-time visitors are more likely to be drawn to Maine because of its *interesting attractions* and to *view the mountains and wildlife*.



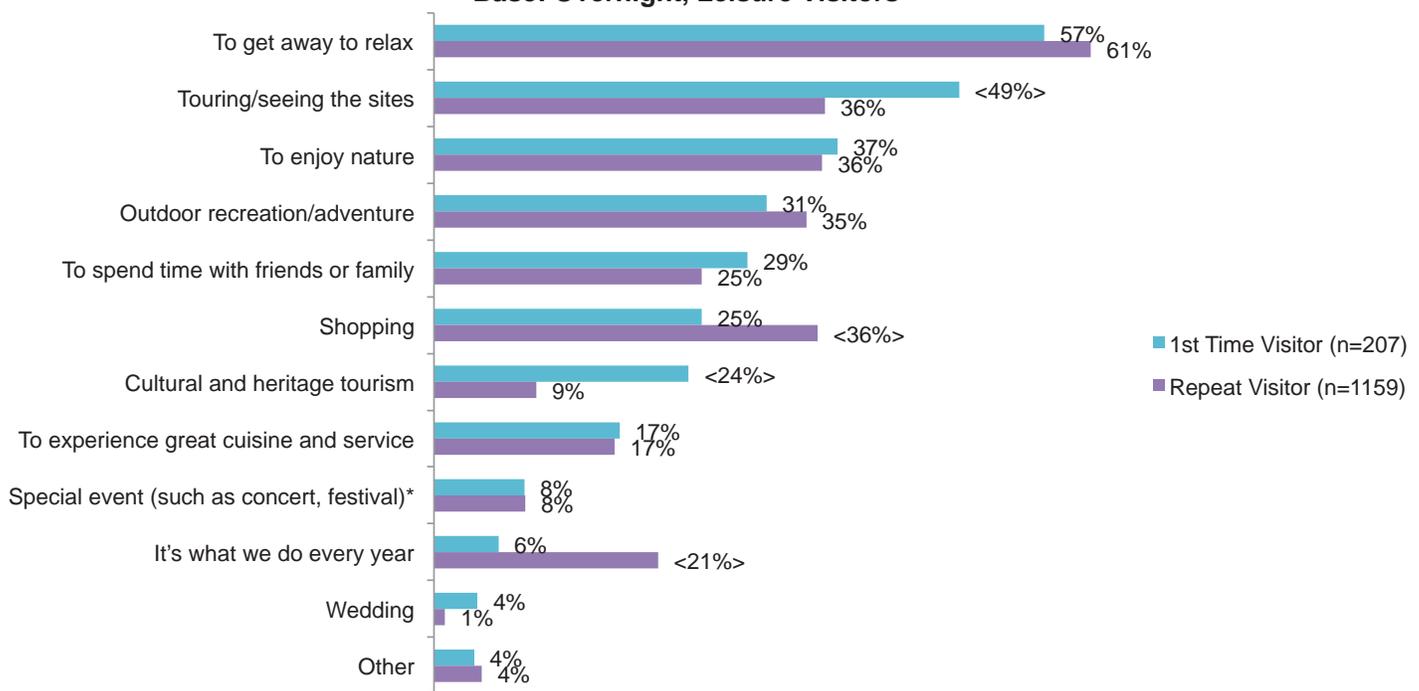
Regional Q16. Thinking about all the places you could have chosen to visit on this trip, why did you choose Maine?
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Primary Purpose of Overnight Leisure Trips

- Both first-time and repeat leisure visitors to Maine are most likely to be visiting the State *to get away to relax*. Differences between first-time and repeat leisure visitors, however, can be seen in some of the other reasons for traveling, with first-time visitors more likely than repeat visitors to be visiting to *tour/see the sites* and for *cultural/heritage tourism*. Repeat visitors are more likely than first-time visitors to be drawn to Maine for its *shopping*.

Primary Purpose of Overnight Leisure Trips
Base: Overnight, Leisure Visitors



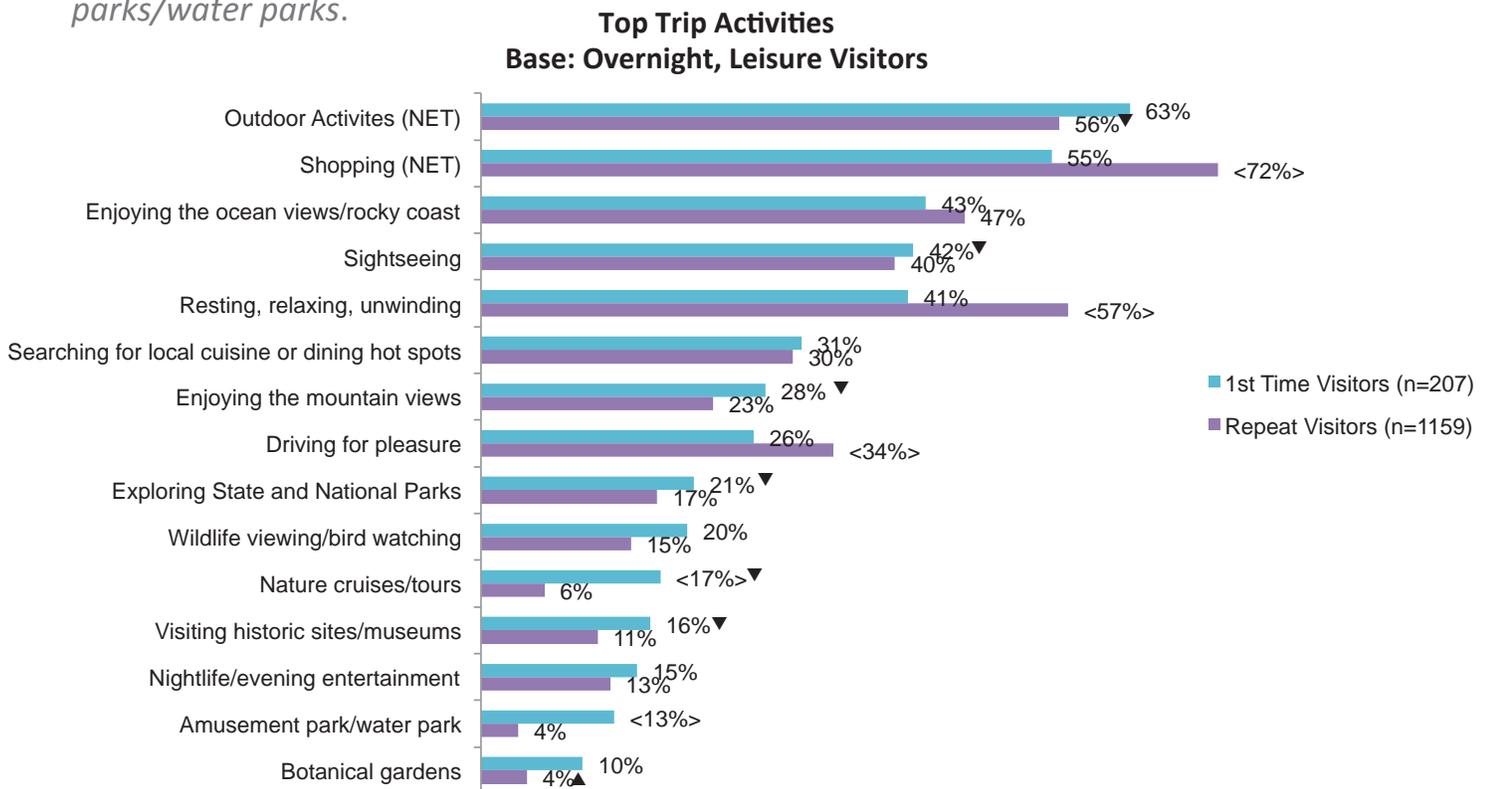
Regional Q7. What was the primary purpose of your most recent leisure trip in Maine?

*Includes wedding before 6/2012

<>indicates significant difference at the 95% confidence level

Top Overnight Leisure Trip Activities

- Outdoor activities and shopping are the most popular trip activities among both first-time and repeat overnight leisure visitors. Repeat visitors, though, are more likely than first-time visitors to enjoy *shopping* and *resting/relaxing/unwinding* while traveling in Maine. First-time visitors are more likely to take in *nature cruises/tours* and *amusement parks/water parks*.



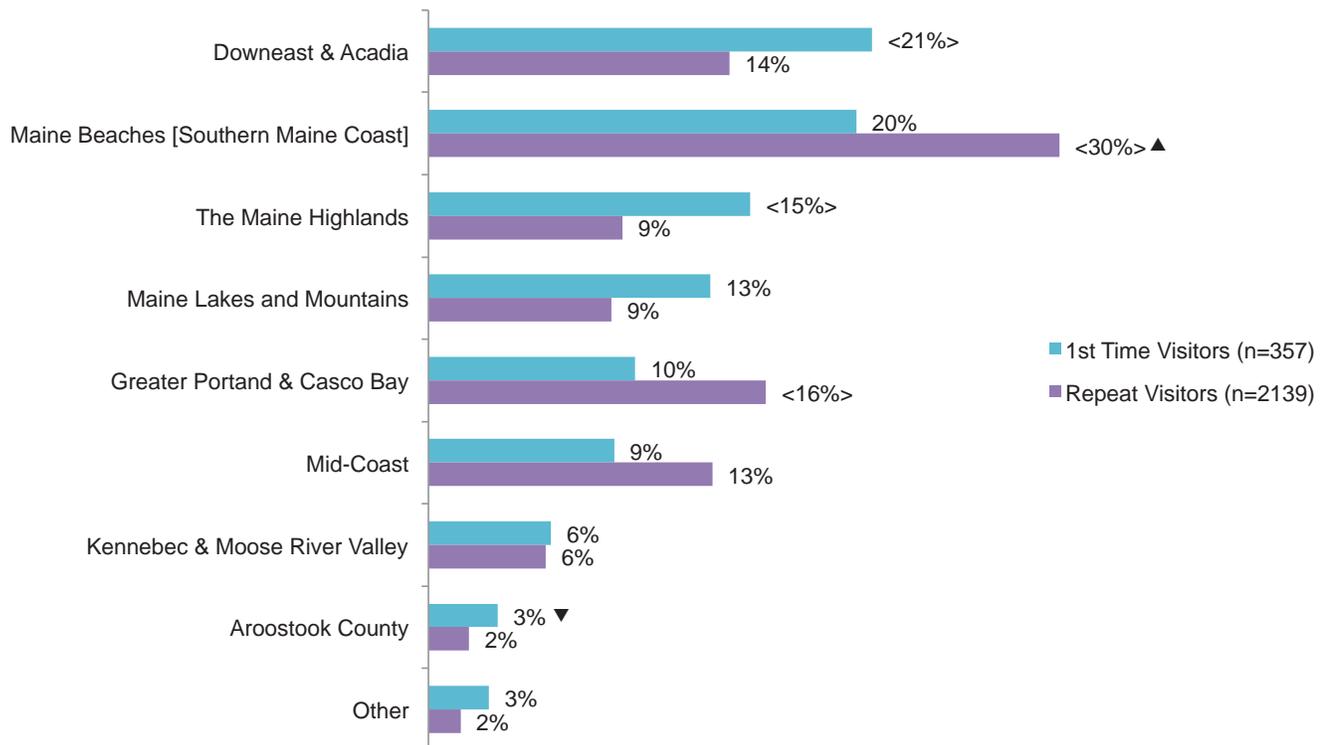
Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)

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Primary Region of Visit to Maine

- While first time visitors are traveling to a number of regions within Maine, they are more likely than repeat visitors to visit the Downeast & Acadia region and the Maine Highlands region. Repeat visitors are more likely to list the Maine Beaches or the Greater Portland & Casco Bay area as their primary region visited.



Regional Q28. What region in Maine was your primary destination?

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Baseline Day Visitor Statistics

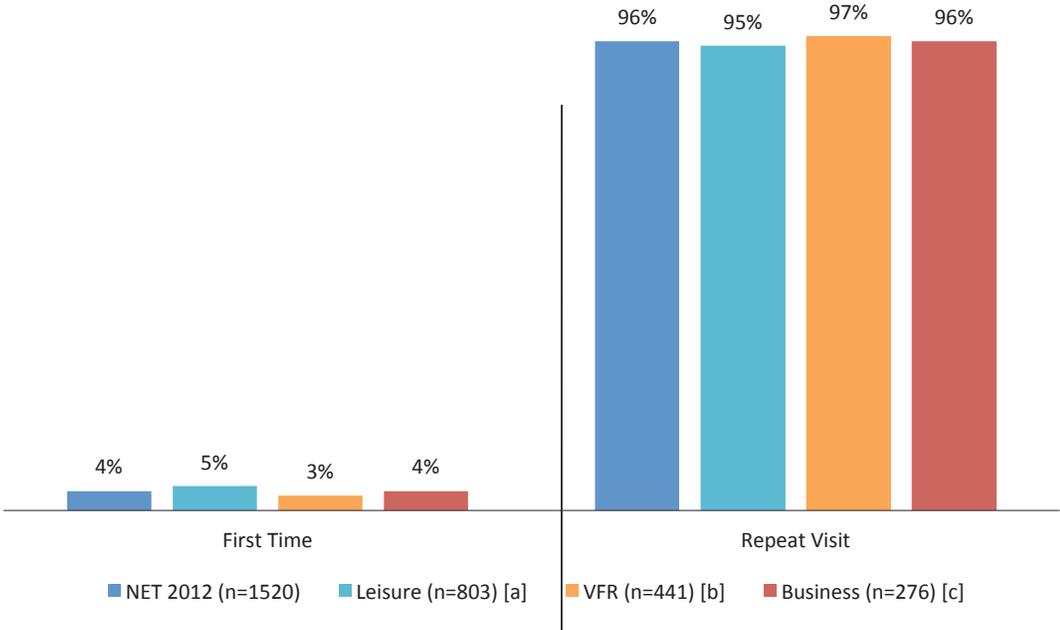


Sample Size Caution:

Please note the small sample size of first time day visitors to Maine (67) and first time leisure day visitors to Maine (43). Data on the following pages pertaining to these sub-groups should be used for directional purposes only.

Day Visitor Trip Type

- Day visitors are much more likely than overnight visitors to be repeat visitors to Maine. In fact, nearly all day visitors surveyed reported that they have been to Maine before.
- There are no differences seen in the proportion of first time and repeat visitors across trip types.



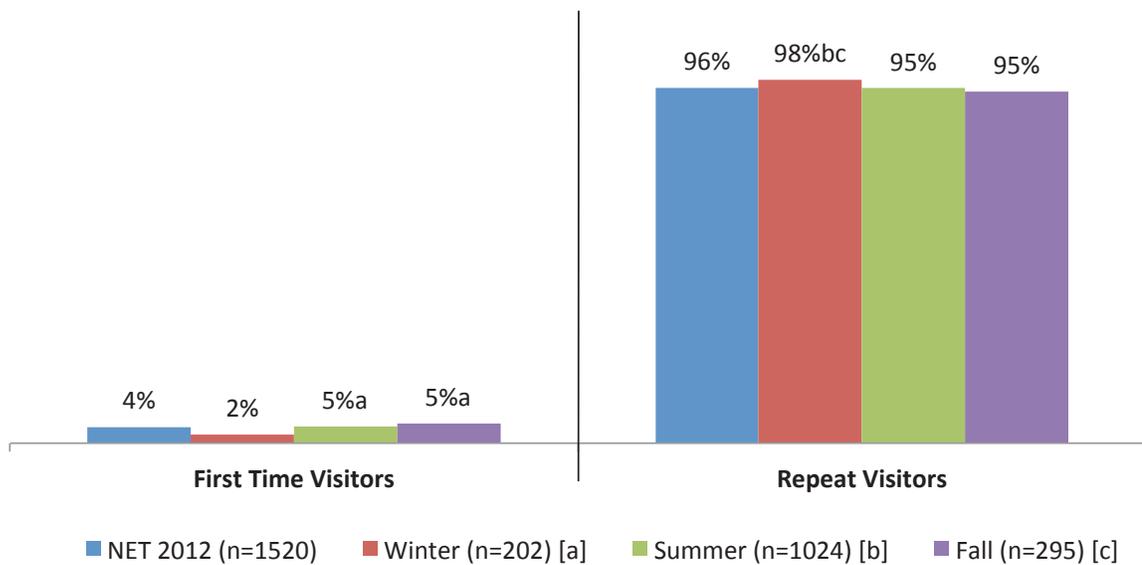
Day Q4. Was this your first trip to Maine?

a, b, c indicates significant difference at the 95% confidence level

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Repeat versus First-Time Visitors by Season

- First-time day visitors to Maine were more likely to have visited during the Summer or Fall seasons.



Day Q4. Was this your first trip to Maine?

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▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Day Visitor Demographics

- First-time day visitors tend to be younger and have lower household incomes than those who have visited Maine in the past. Otherwise, demographics are relatively similar between 1st time and repeat day visitors to Maine.

2012, Day Leisure Visitors	1st Time (n=67*)	Repeat (n=1453)
Age:		
< 35	<62%>	22%
35 - 44	11%	16%
45 - 54	11%	<22%>
55 +	16%	<40%>
Mean Age	36.53	<48.36>
Income:		
< \$50,000	25%	16%
\$50,000 - \$99,000	43%	42%
\$100,000 +	31%	42%
Mean Income (In Thousands)	\$86.81	\$102.00
Female	43%	49%
College Degree or Higher	73%	73%
Married	56%	62%
Employed Full Time	55%	63%

**Please note small sample size. Data should be used for directional purposes only.*

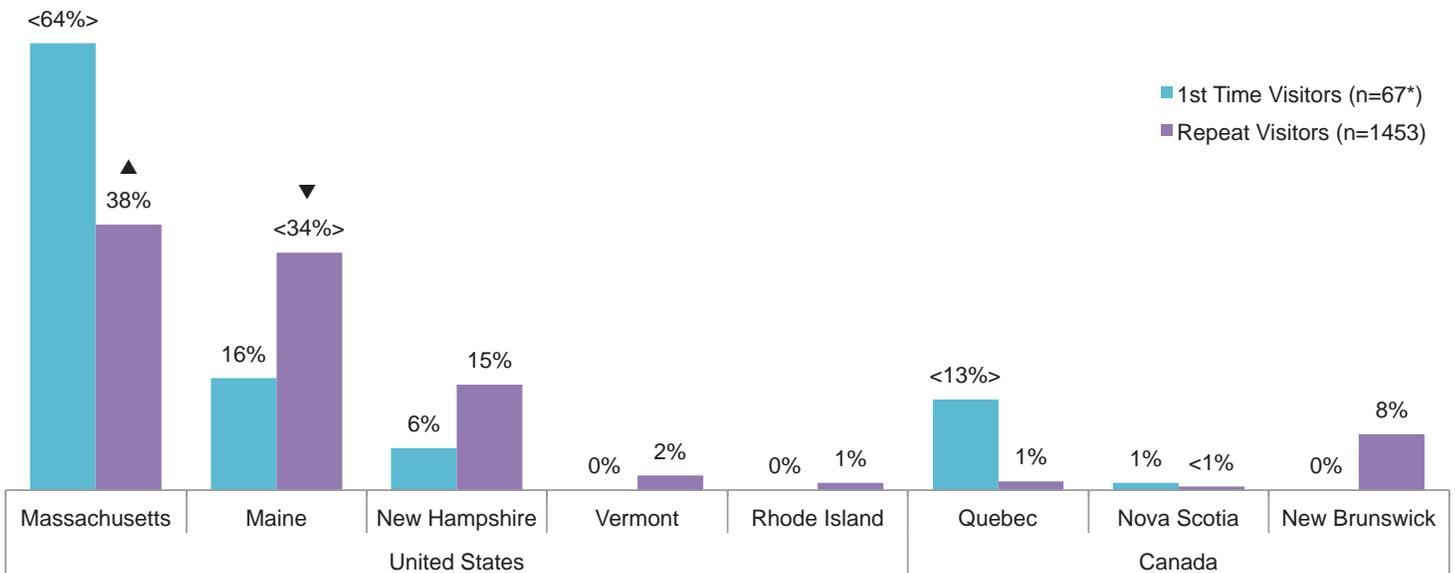
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Day Visitor Residence

- First-time day visitors to Maine are more likely to come from Massachusetts or Quebec than are repeat visitors. They are less likely to be in-state visitors or visitors from the bordering states/provinces of New Hampshire and New Brunswick.

Base: Day Visitors



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

*Please note small sample size. Data should be used for directional purposes only.

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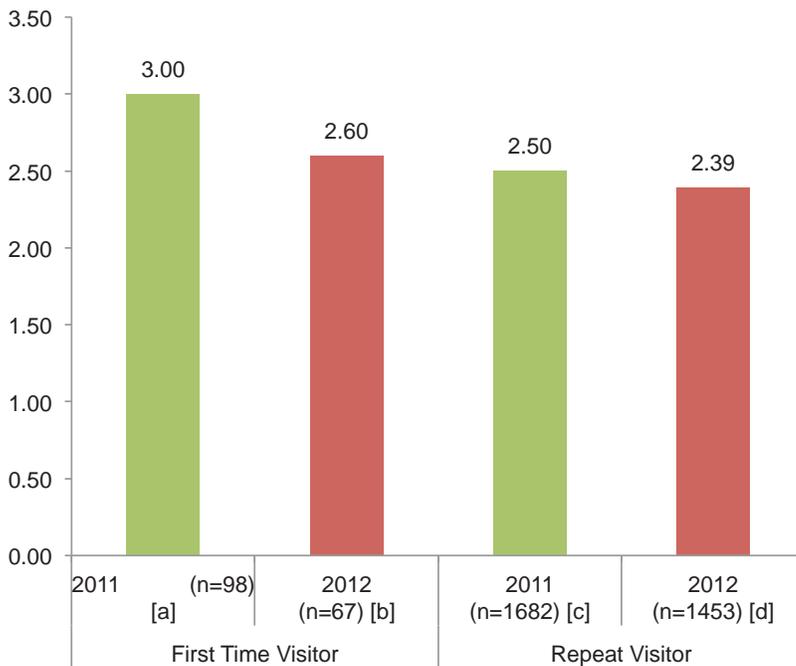
Day Visitor Travel Logistics



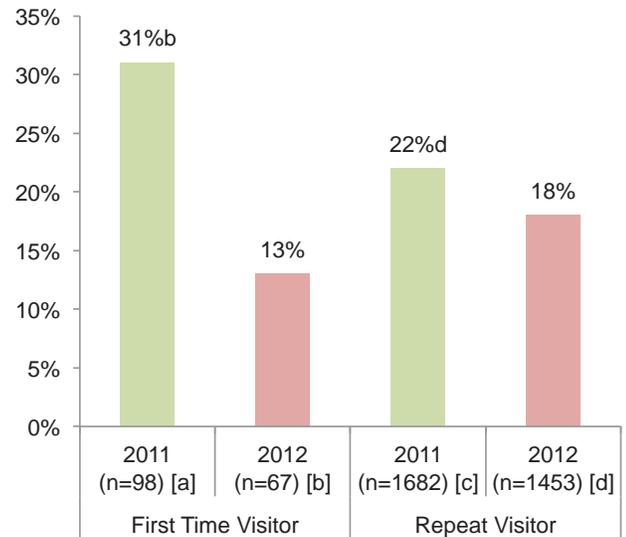
Travel Party Size and Composition

- Travel party size and composition is similar between first time and repeat visitors.

Mean Number of People in Travel Party



Percent Traveling with Children



Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q8. How many of these people were: Children

a, b, c, d indicates significant difference at the 95% confidence level

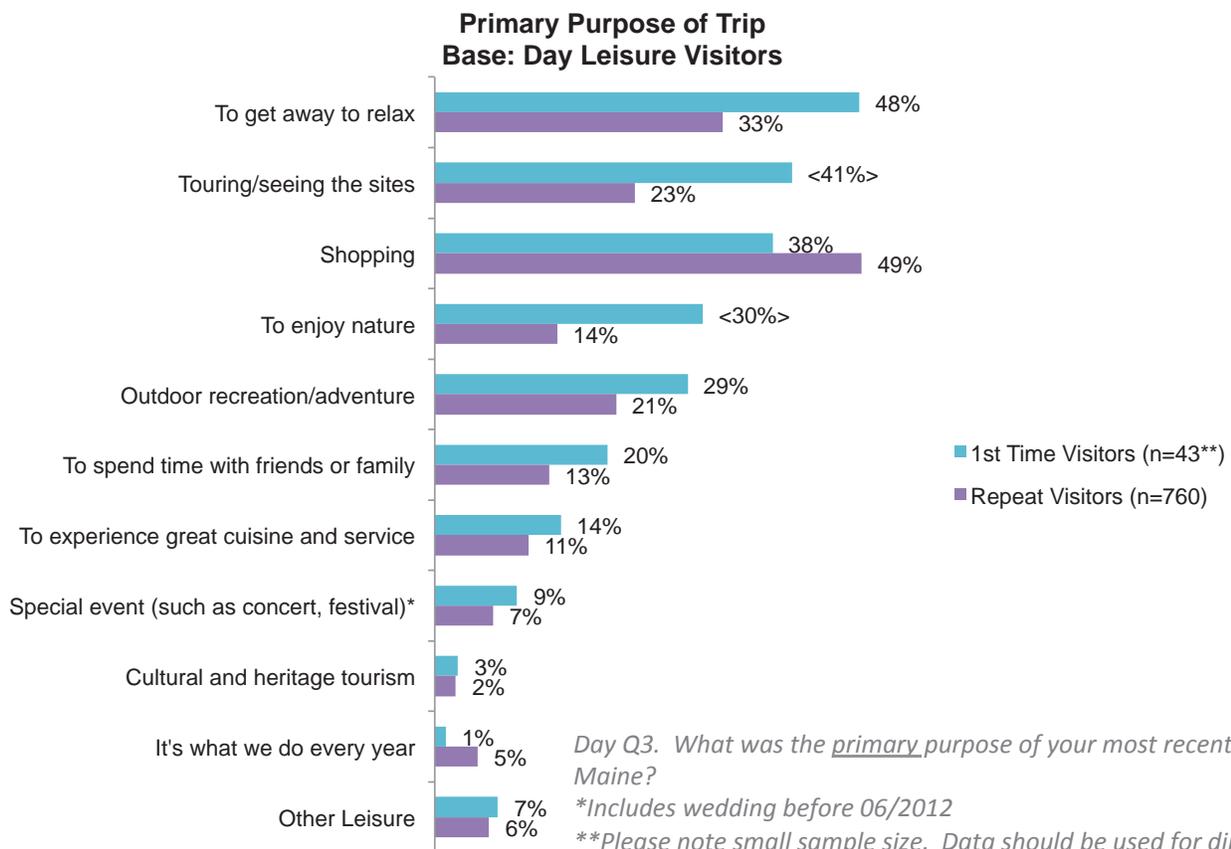
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Day Visitor Experience



Primary Purpose of Day Leisure Trips

- First time leisure day visitors to Maine are more likely to spend their time *touring or enjoying nature* than are repeat visitors.



Day Q3. What was the primary purpose of your most recent leisure trip in Maine?

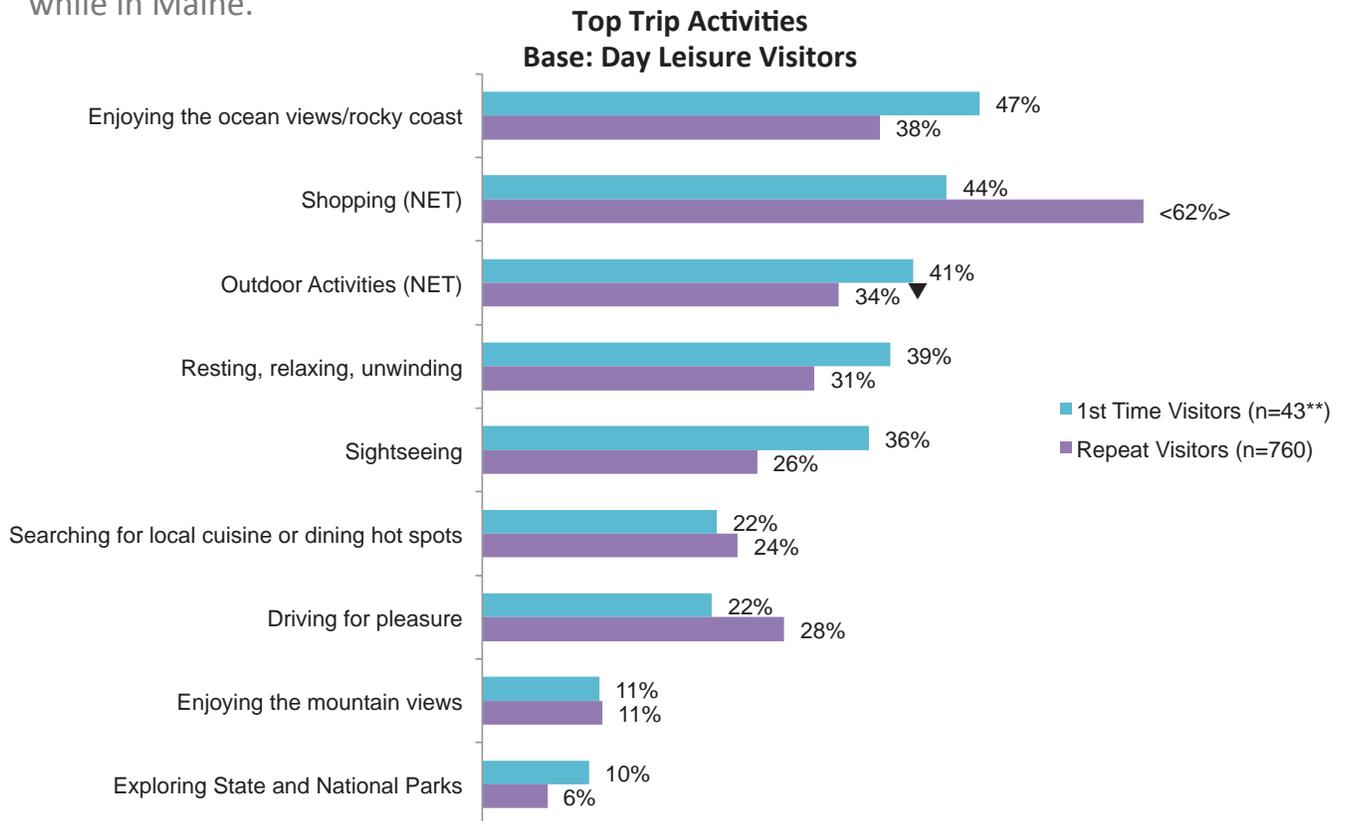
*Includes wedding before 06/2012

**Please note small sample size. Data should be used for directional purposes only.

<>indicates significant difference at the 95% confidence level

Day Leisure Trip Activities

- The most popular trip activity among first-time day leisure visitors is *enjoying the ocean views/rocky coast*. Repeat day leisure visitors, however, are most likely to be *shopping* while in Maine.



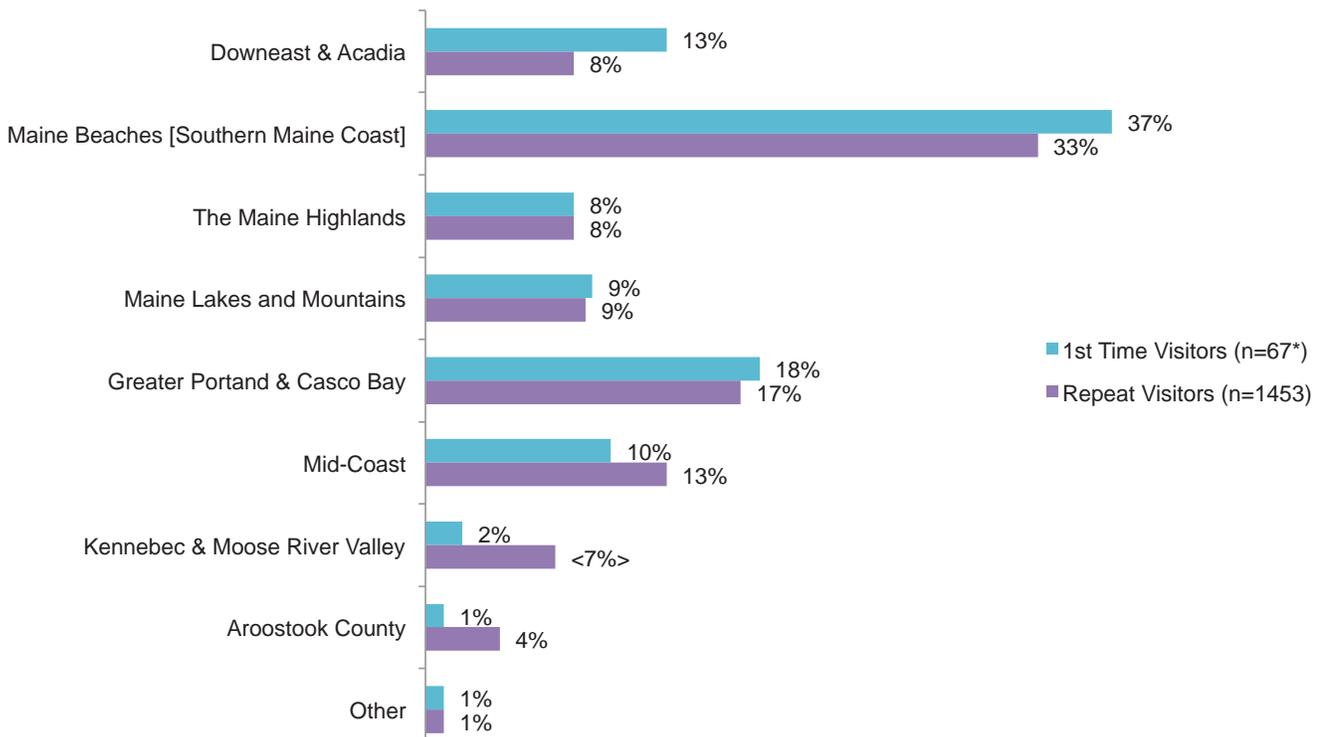
Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).

*Please note small sample size. Data should be used for directional purposes only.

<> indicates significant difference at the 95% confidence level

Primary Region of Visit to Maine

- Both first time and repeat day visitors are traveling to a number of regions within Maine. The Kennebec & Moose River Valley region appears to attract a higher proportion of repeat day visitors than first time visitors.



Day Q11. What region in Maine was your primary destination?

*Please note small sample size. Data should be used for directional purposes only.

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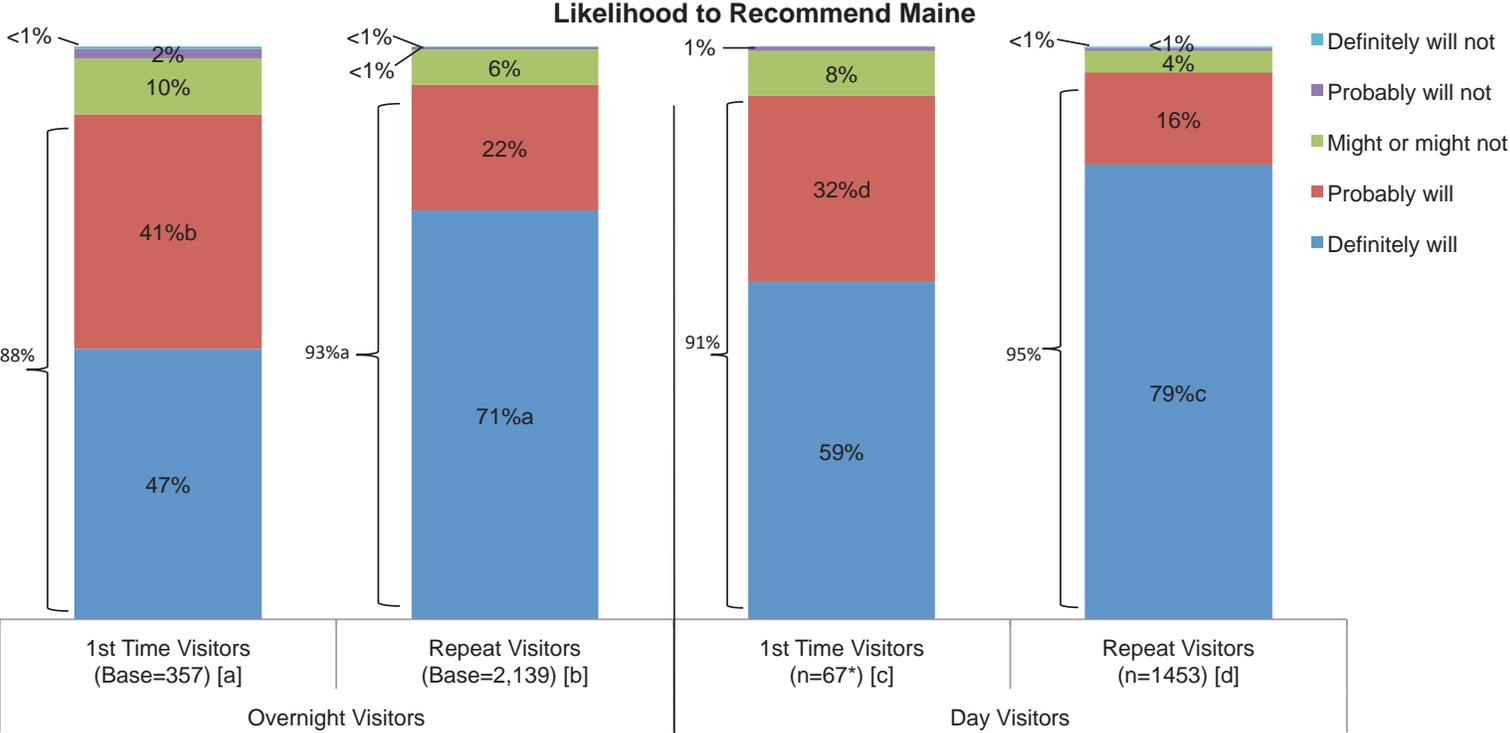
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Future Travel and Recommendation



Likelihood to Recommend Maine

- While not as strong as repeat visitors, who are fully converted to the positives of the Maine experience, nine-in-ten first time visitors report some likelihood to recommend Maine as a vacation destination to their friends or relatives. However, although still a majority, fewer first time visitors are 'definite' about their willingness to recommend a trip to the state.



Regional Q38, Day Q19b. How likely will you be to recommend Maine as a vacation destination to friends or relatives?

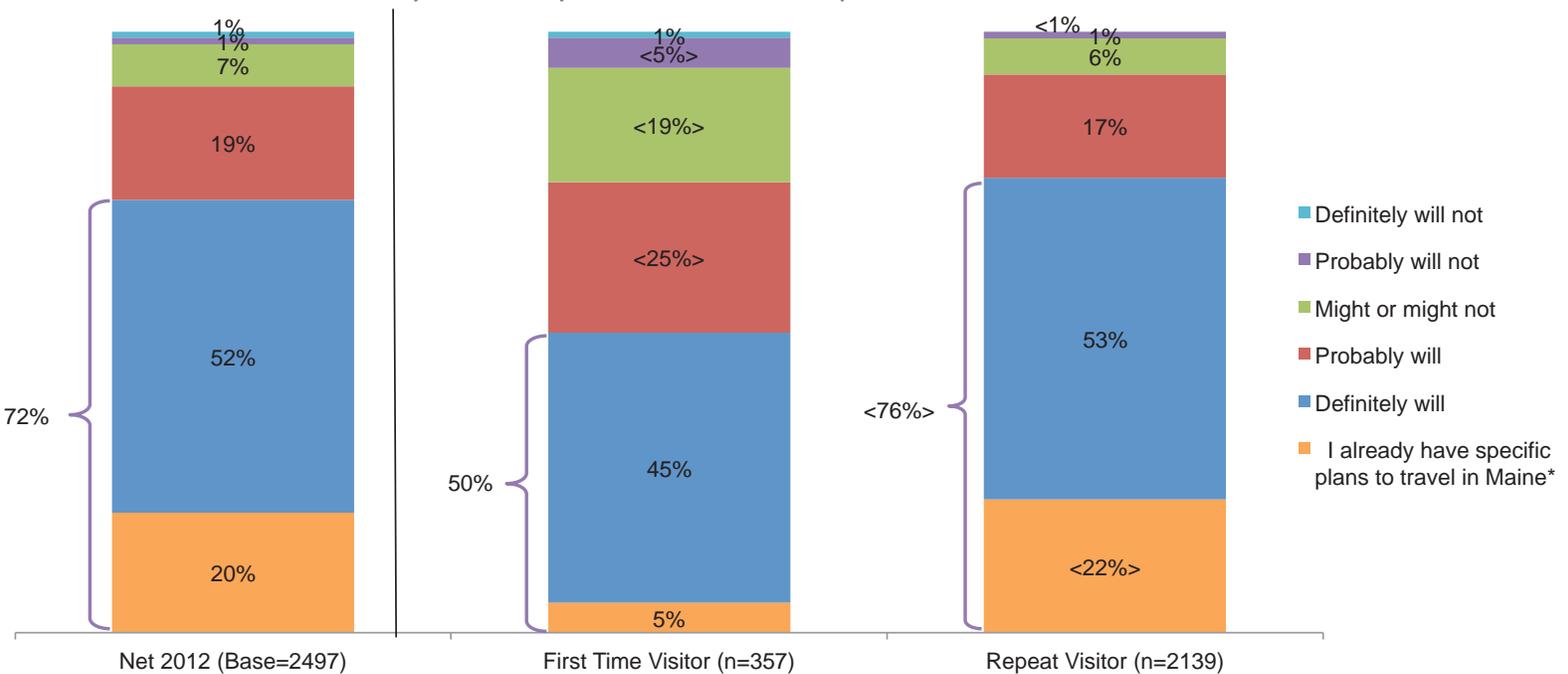
*Please note small sample size. Data should be used for directional purposes only.

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Future Travel in Maine – Overnight Visitors

- Repeat overnight visitors, who have already established a pattern of visitation to Maine, express a higher intent to travel to Maine in the next two years than first-time visitors. Three-fourths of repeat visitors either already have specific plans to travel in Maine or indicate that they definitely will do so, as compared with half of first-time visitors.



Regional Q37, Day Q19. How likely will you be to travel in Maine in the next two years?

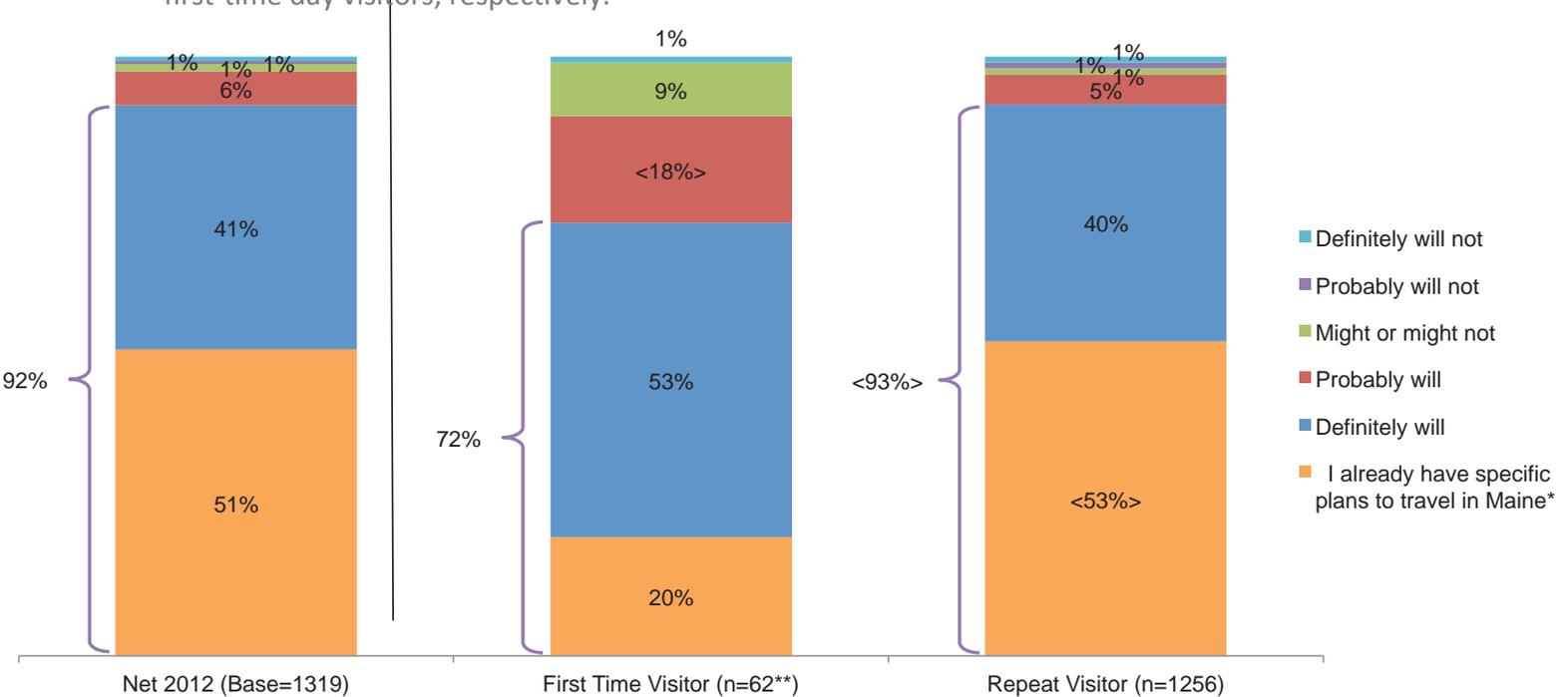
*Added Summer 2012.

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Future Travel in Maine – Day Trippers

- Similar to overnight visitors, likelihood to travel to Maine in the next two years is not as strong among first time day visitors as it is for repeat day visitors. Still, the majority of first time visitors indicate that they either definitely will travel in Maine or that they already have specific plans to do so. More than half of repeat day visitors *already have specific plans to travel in Maine* and an additional 40% report that they definitely will travel in Maine. This compares to 20% and 53% of first-time day visitors, respectively.



Regional Q37, Day Q19. How likely will you be to take a day trip in Maine in the next two years?

*Added Summer 2012.

**Please note small sample size. Data should be used for directional purposes only.

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