

Maine Office of Tourism Visitor Tracking Research

Winter 2013/2014 Seasonal Topline

Prepared by



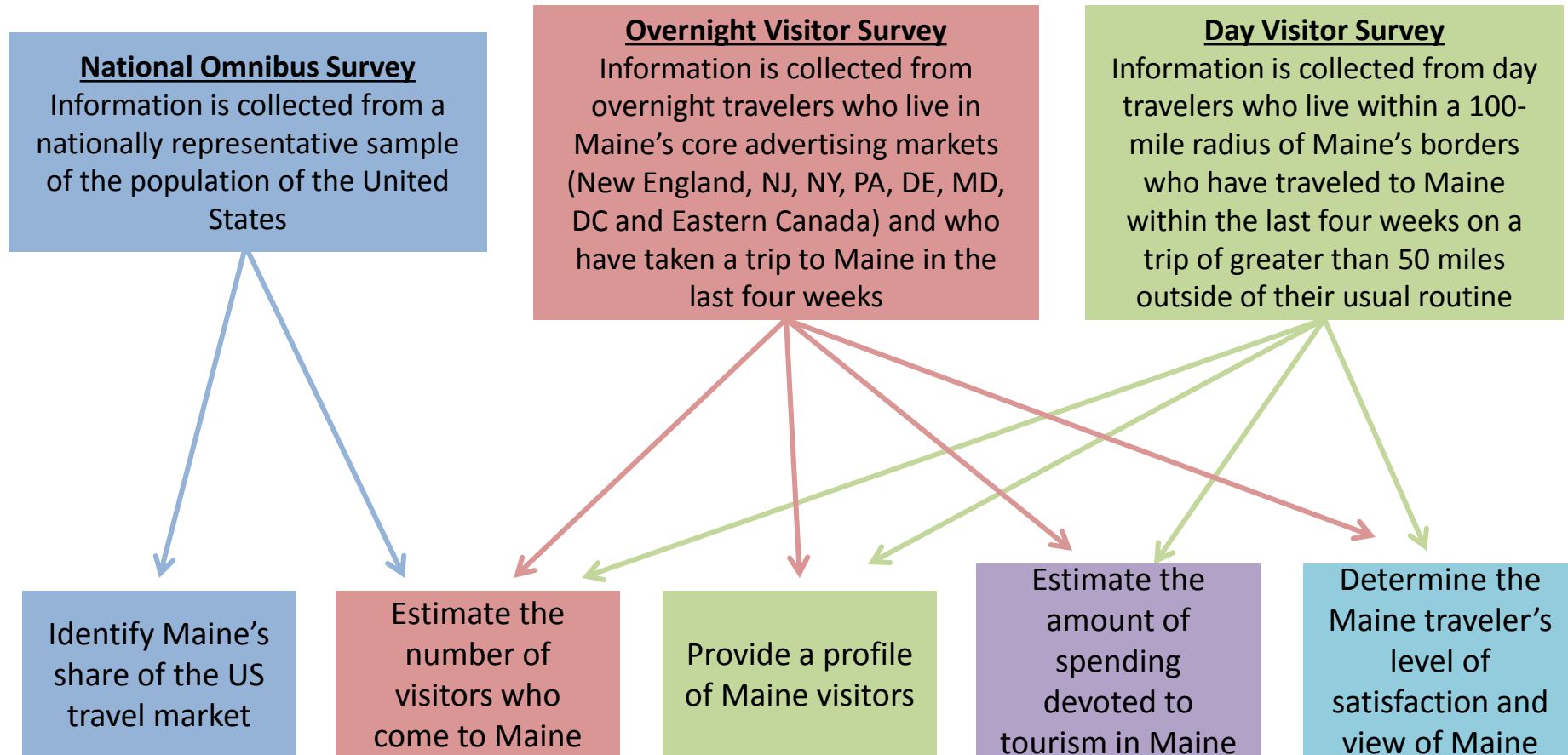
June 2014

Purpose and Methodology



Research Purpose and Methodology

The purpose of the Maine Office of Tourism's Visitor Tracking Research is to measure and provide insights into the tourism activity in Maine. These insights are provided by three distinct surveys.



Executive Summary



Executive Summary

Please note that the results provided in this seasonal summary are preliminary and reflect visitation from December 2013 through April 2014. At the conclusion of the 2014 travel reporting season (December 2014), adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

- Nationwide overnight leisure travel from December 2013 to April 2014 was stable when compared with the two prior winter seasons. Similarly, Maine experienced relatively no change in tourism-related overnight visitation to the State. Considering the unusually cold temperatures felt in the late winter months for Maine and multiple winter storms experienced throughout the Northeast and Southeast, this relatively fixed rate of visitation is better than expected.
- Day visitation to Maine showed an increase over the 2012/2013 winter season, with 13% more day visitors coming to Maine during this recent winter season.

Executive Summary

- 2012 and 2013 showed continual year-over-year increases in the proportion of overnight visitation from Canada, with a slight hint of potential leveling off during the Summer 2013 season. This recent Winter 2013/2014 season showed a drop in the proportion of overnight visitors arriving from Canada, returning to the levels seen in prior years. This decrease may be an indicator of oncoming drops in Canadian visitation, or it may be a seasonal variation seen during this winter season. Visitation estimates for the Summer and Fall seasons of 2014 will provide more stability in any conclusions to be drawn from these changes.
- Though well known for its summer beach opportunities, the Maine Beaches region continued to attract the greatest proportion of both overnight and day visitors to Maine during the Winter 2013/2014 season. The various shopping opportunities in this region are the likely draw during the winter months, as the highest proportions of visitors listed “shopping” as an interest area they wanted to pursue on this trip. In addition, more than half of these visitors specifically mentioned having done some outlet shopping.

Executive Summary

- Showing a slight increase over last winter, first-time visitors account for 15% of Maine's overnight visitors. Continued monitoring of first-time visitation rates in the coming seasons will help determine if a true shift in the proportion of first-time visitors is occurring or if this season's increase represents a one-time seasonal variation. First-time day visitation remains unchanged at less than 5%.
- Maine continues to receive extremely favorable evaluations from its visitors. The structure and rating scale used for these evaluative measures were revised in 2014, making any direct comparisons to prior years not possible. However, the general categories receiving the highest ratings continue to center on visitors' overall experience and the service and friendliness of the Maine people. In addition to several other categories, more than half of Winter overnight visitors stated that their vacation exceeded their expectations for *friendliness of the people, welcoming locals who make visitors feel comfortable, and overall quality of customer service*. More than half of day visitors felt similarly about the *friendliness of the people*, and just under half responded similarly regarding *welcoming locals who make visitors feel comfortable*.

Executive Summary

- Following on these favorable ratings, one-third of Maine's overnight Winter visitors *already have plans to visit Maine* again in the next two years, and half say that they *definitely will travel* to Maine. Future travel intent is even stronger among day visitors, with two in five *already having specific plans to travel* in Maine, and half saying they *definitely will travel* in Maine. Further, three-fourths of Maine's overnight and day visitors say that they *definitely will recommend Maine* as a vacation destination to friends or relatives.

2013/2014 Winter Season Travel Context



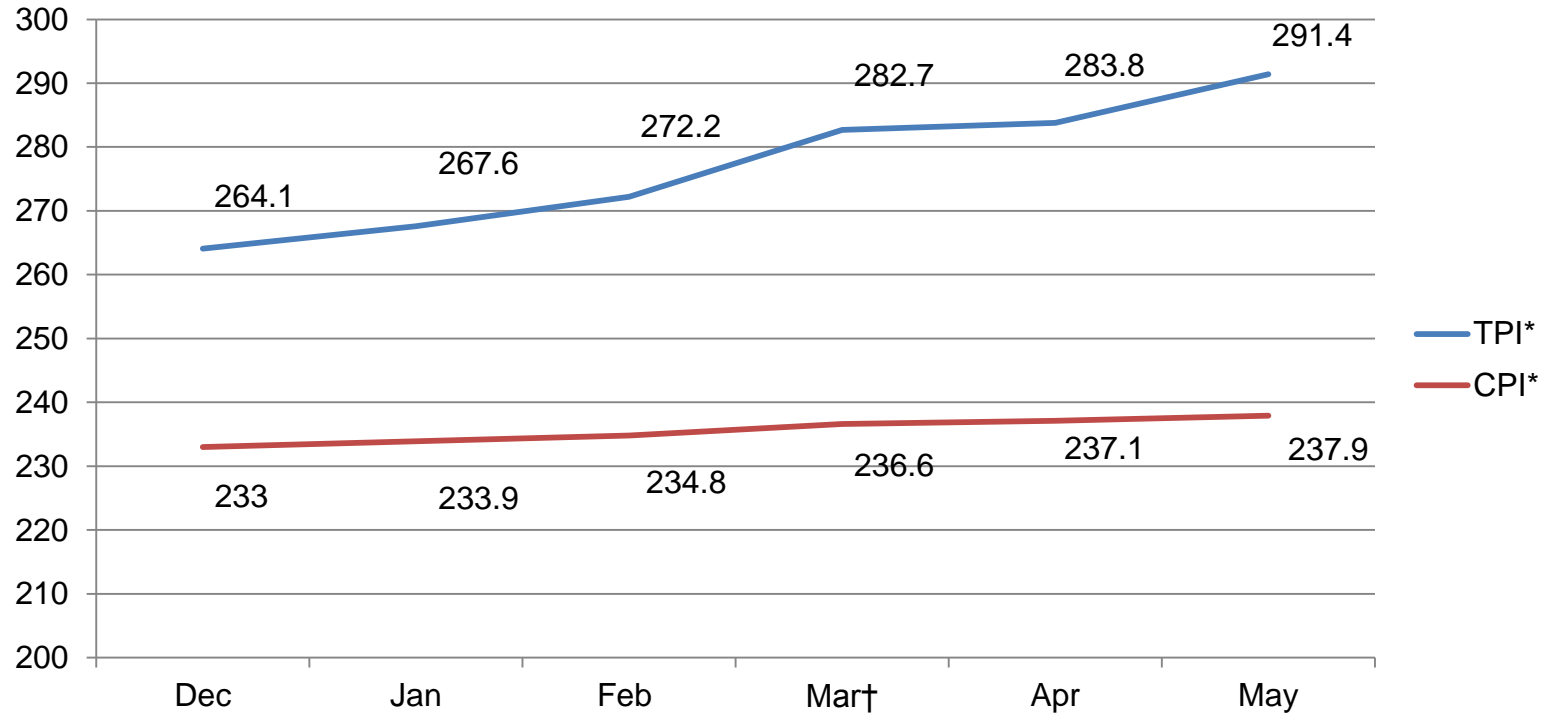
Stormy winter persists; widespread snow and ice storms throughout Northeast, Southeast, and Midwest.

- December, January, and February saw several storms create travel problems. Major highways were closed, flights delayed, airports closed, and various power outages.
- The Southeast United States experienced three major storms in January alone, paralyzing a region not accustomed to winter travel conditions.



Travel Price Index continues to grow at a faster rate than the Consumer Price Index, resulting in a continued high cost of travel.

Consumer Price Index and Travel Price Index



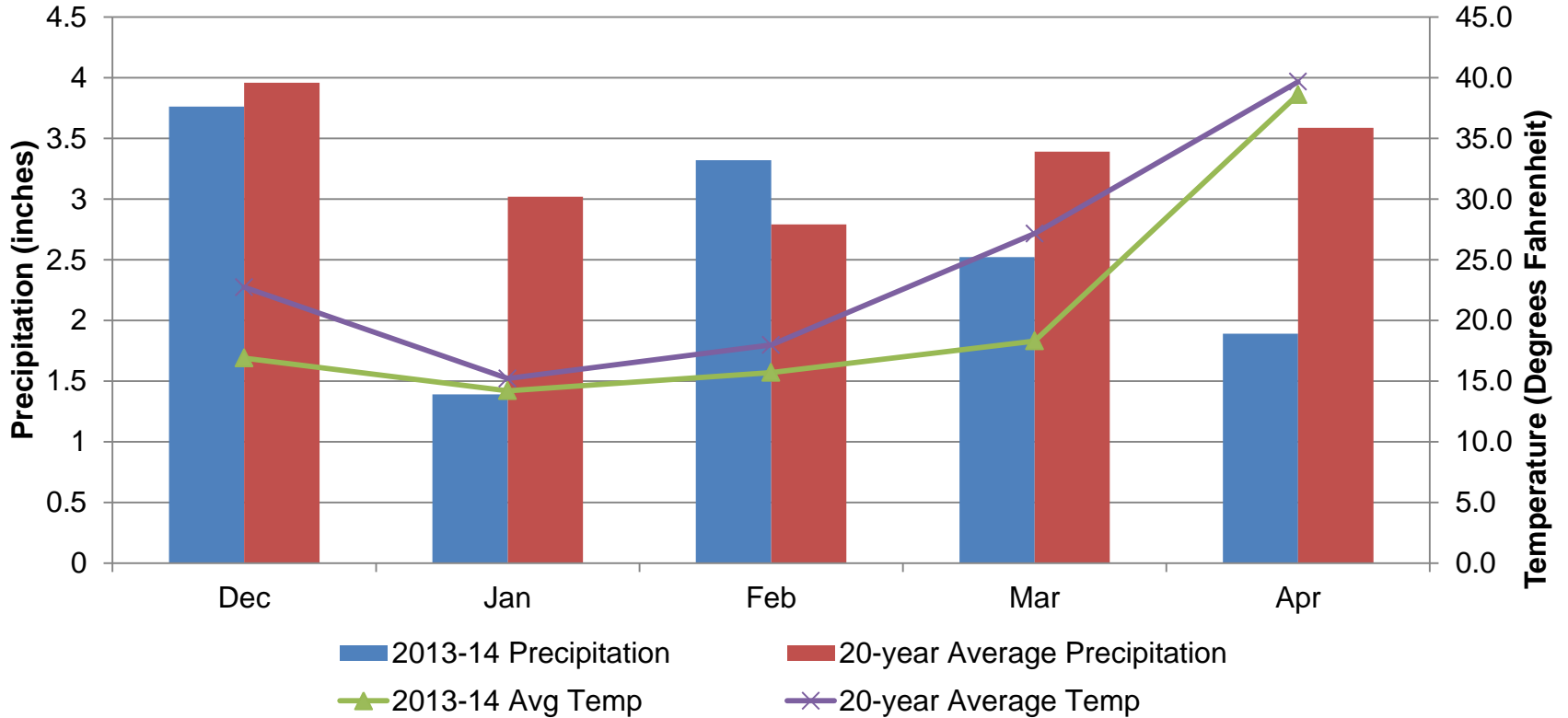
*Note: base years for Consumer Price and Travel Price Indices are 1982-1984=100

†Note: March data are estimates

Data Sources: CPI figures are from the US Bureau of Labor Statistics, TPI figures are from the US Travel Association

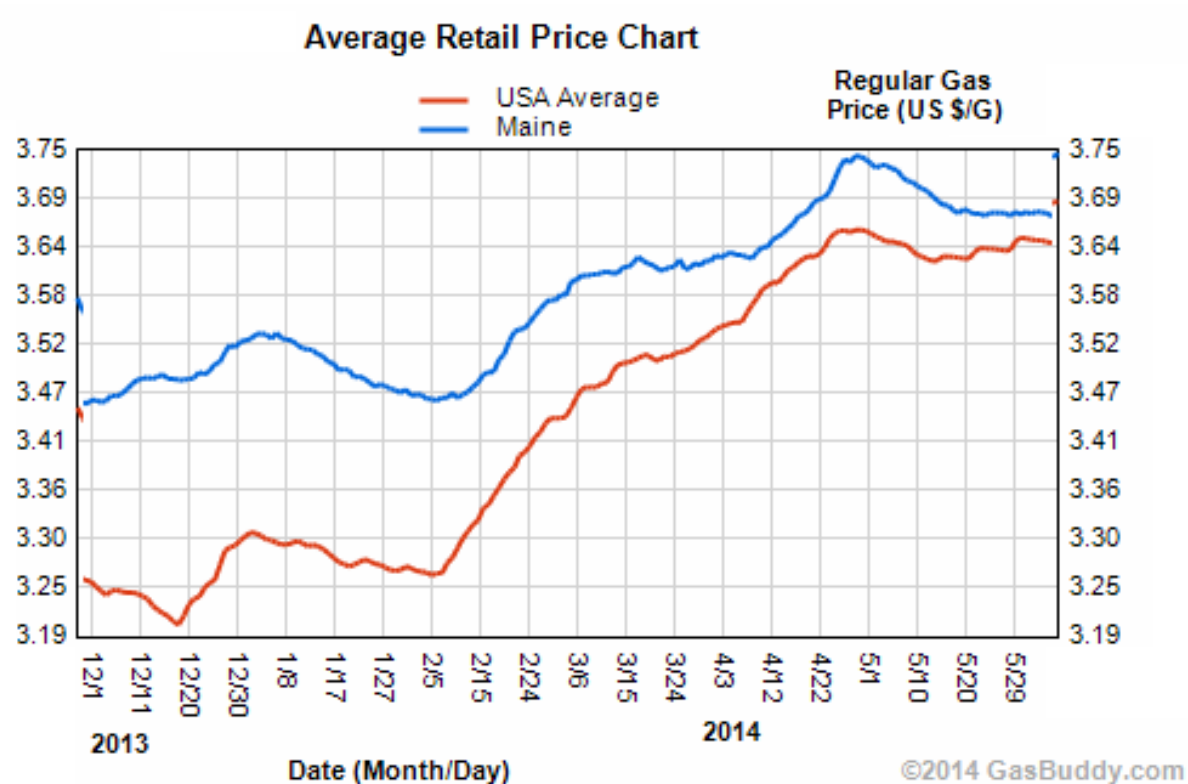
Maine precipitation at or below average for the Winter, with average temperatures lower than historical average, particularly in March.

Precipitation and Temperature – Maine Winter 2013-2014



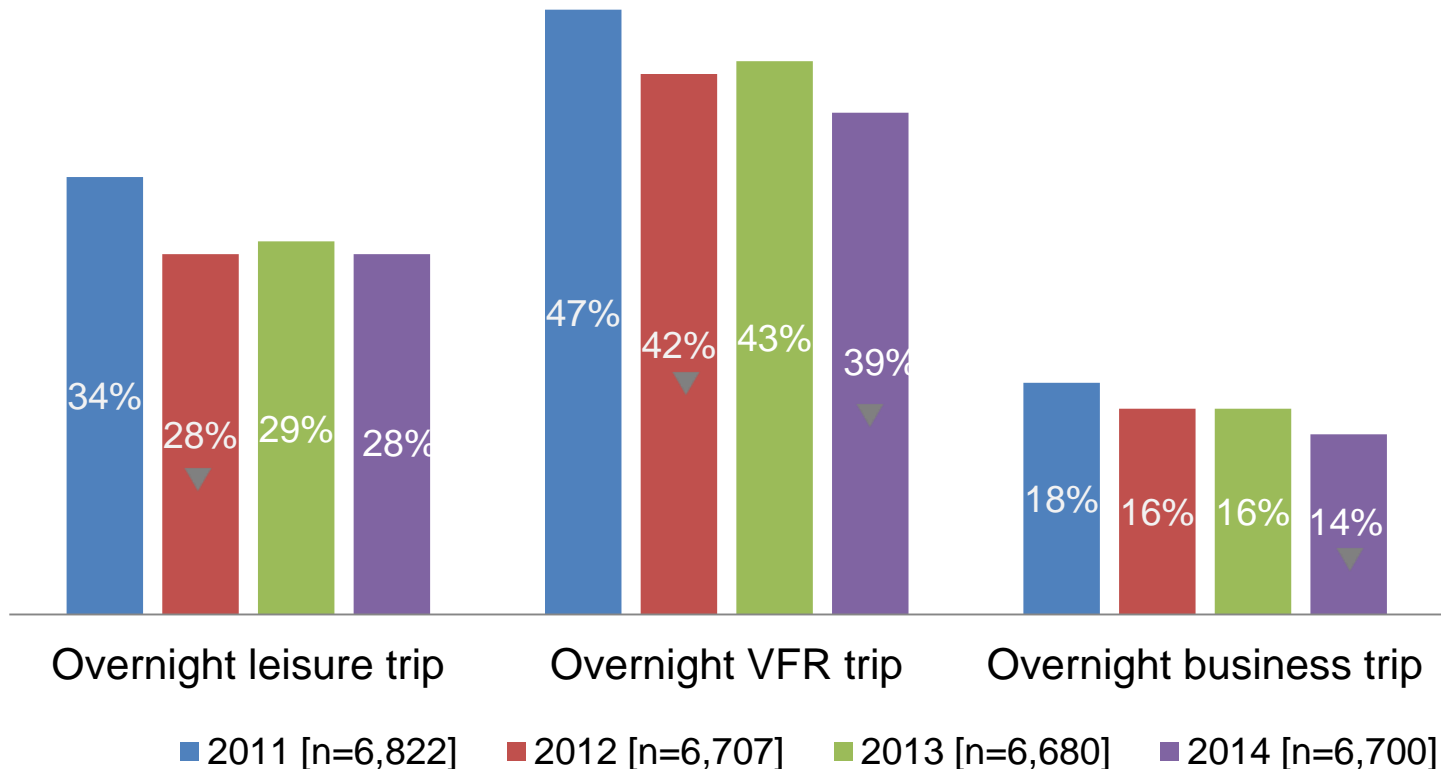
Maine gas prices continue to surpass US average prices during the Winter season.

- The average price of gasoline in Maine during the winter of 2013/2014 surpassed the US average, steadily rising and then peaking toward the end of the season.



Leisure travel nationwide remains stable with prior years, while slight drops are seen in business and VFR travel.

Proportion of U.S. Residents Taking a Trip During the Winter Season

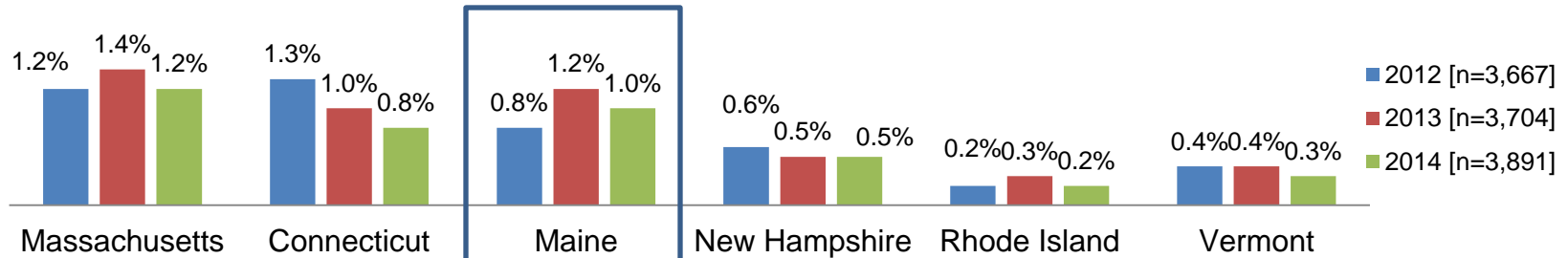


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

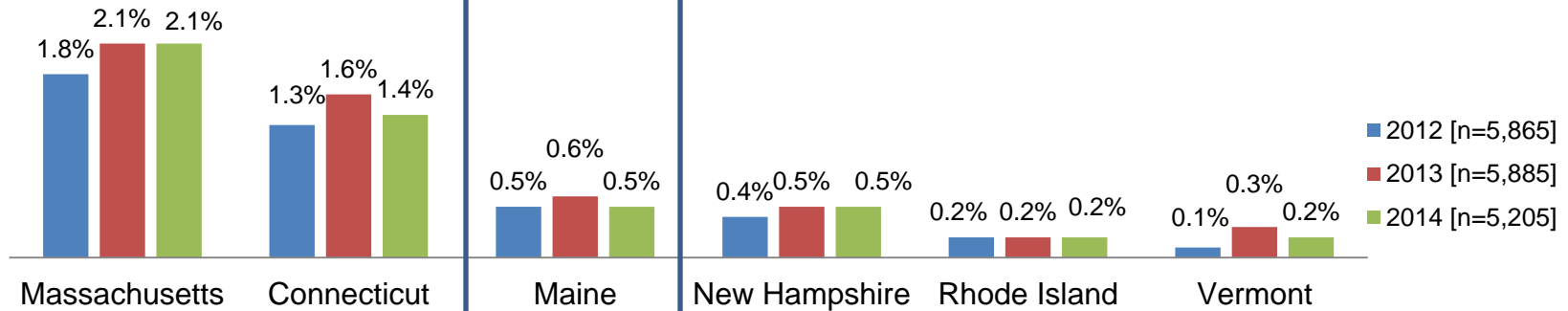
▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Maine continues to hold on to about 1% of the national overnight leisure travel market.

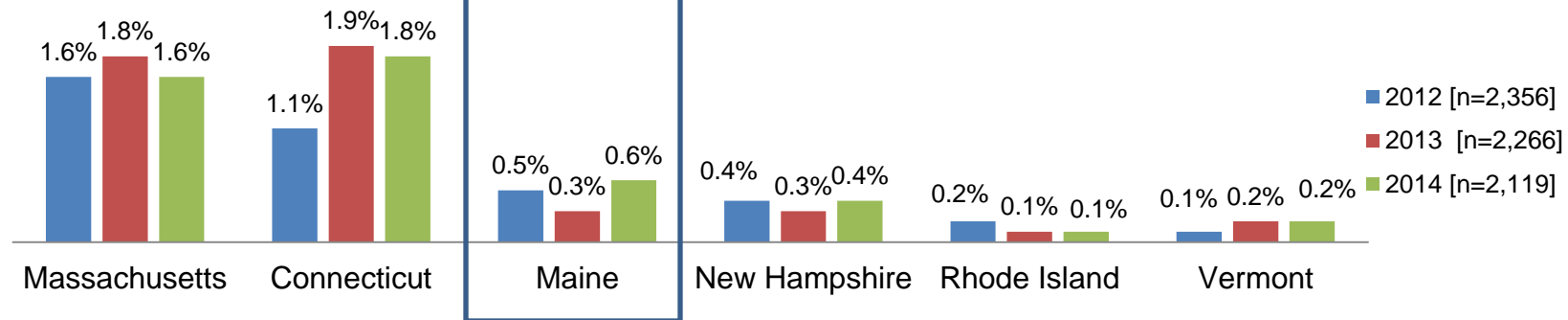
Overnight Leisure Trips



Overnight VFR Trips



Overnight Business Trips



Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.

▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

2013/2014 Winter Season Highlights



Estimated overall visitation to Maine increased 5% between the 2013 and 2014 winter seasons.

- While overnight visitation estimates are relatively flat between the prior and current winter seasons, day visitation is up 13%.

Note: Visitation estimates provided here are preliminary and reflect visitation from December 2013 through April 2014. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

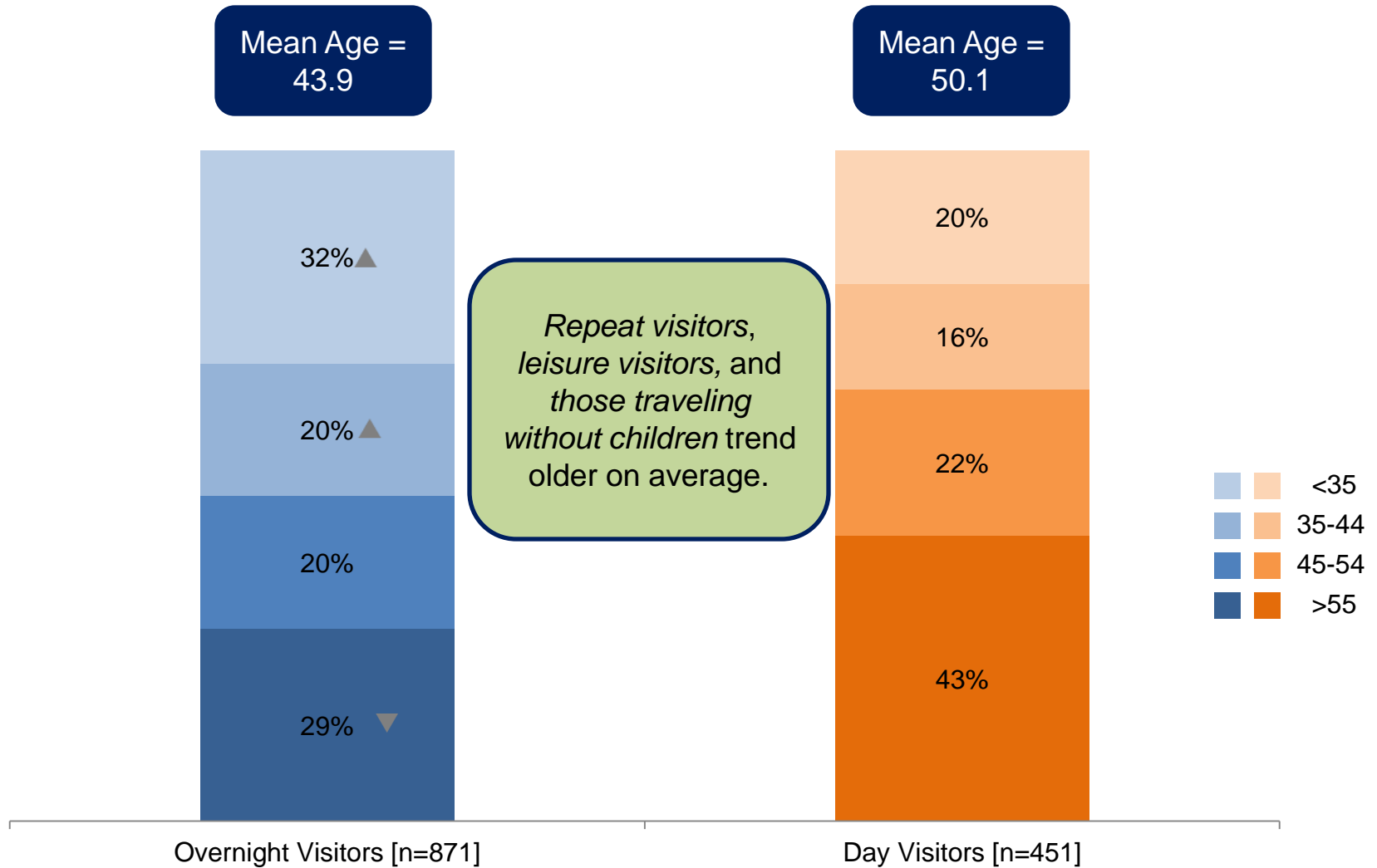
Visitation Estimates*	Winter 2012/2013	Winter 2013/2014	% Chg
Total Estimated Visitation	5,178,246	5,449,568	+5.2%
<i>Overnight Visitors</i>	<i>2,893,077</i>	<i>2,865,130</i>	<i>-1.0%</i>
<i>Day Visitors</i>	<i>2,285,169</i>	<i>2,584,438</i>	<i>+13.1%</i>

**For the purposes of visitation estimates, only visitors on tourism related trips are included.*

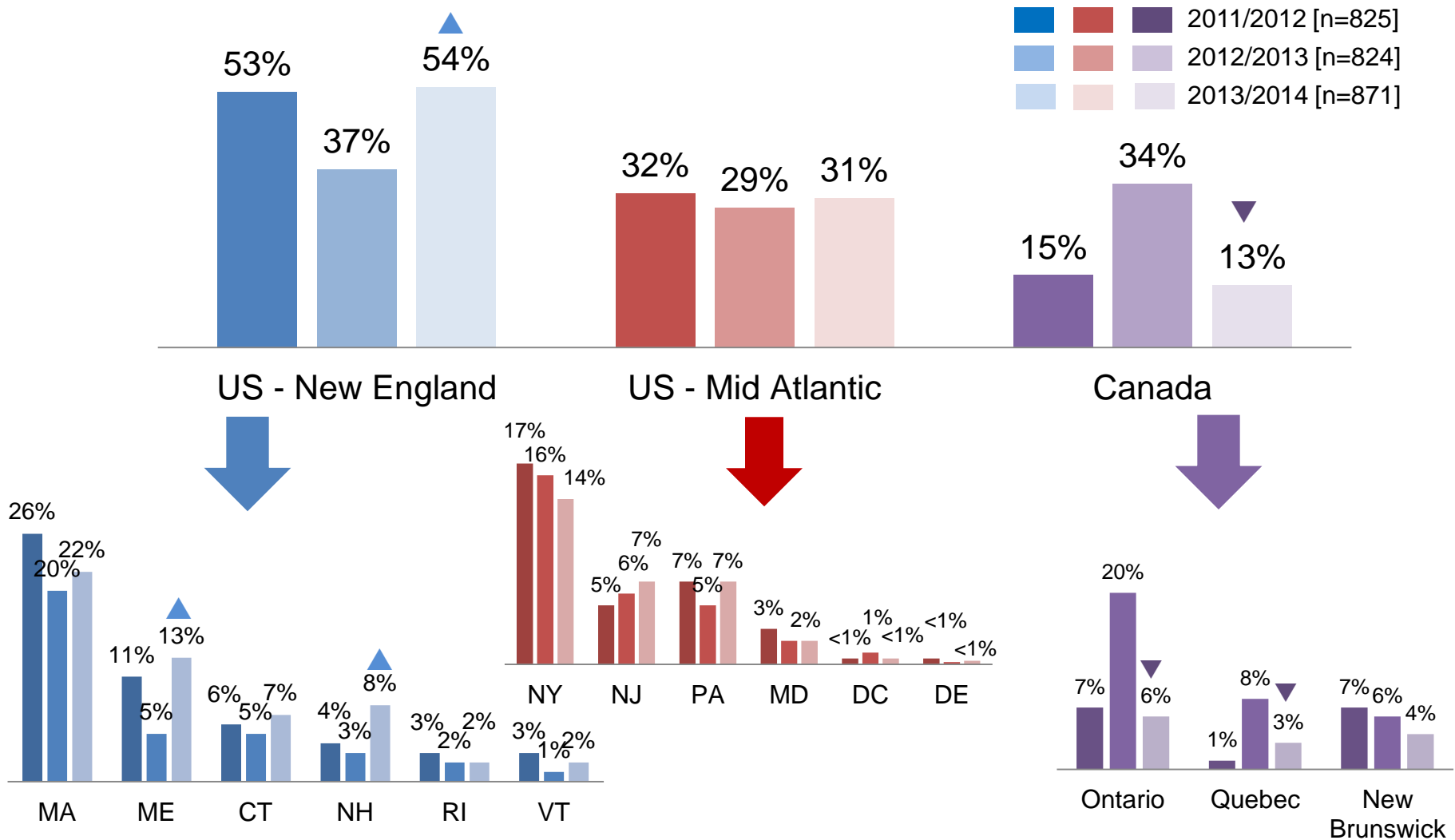
Tourism related trips include:

- All leisure trips.*
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.*
- Business trips that are for a convention/conference/trade show or training/professional development.*

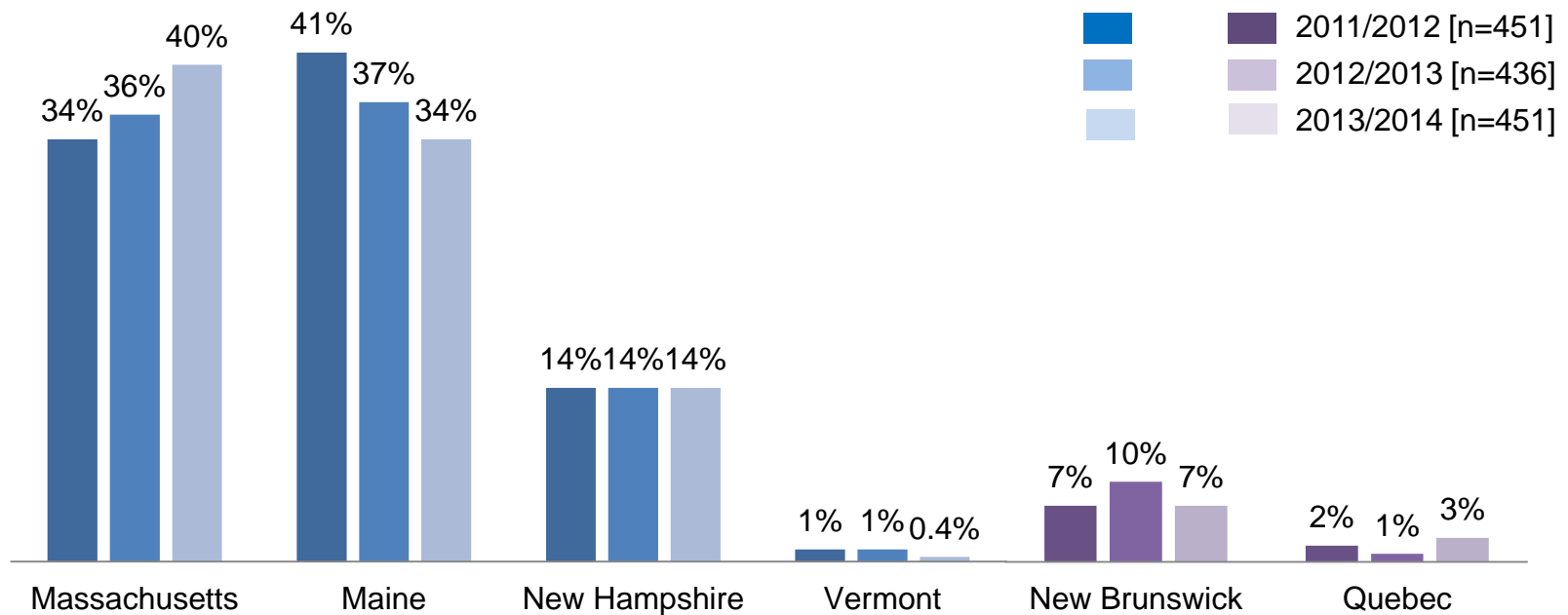
Maine winter visitors average in their 40s and 50s, with day visitors trending a bit older than overnight visitors.



The 2014 winter season saw an increase over 2013 in the proportion of overnight visitors from New England and a decrease in the proportion from Canada, returning to levels seen in previous winter seasons.

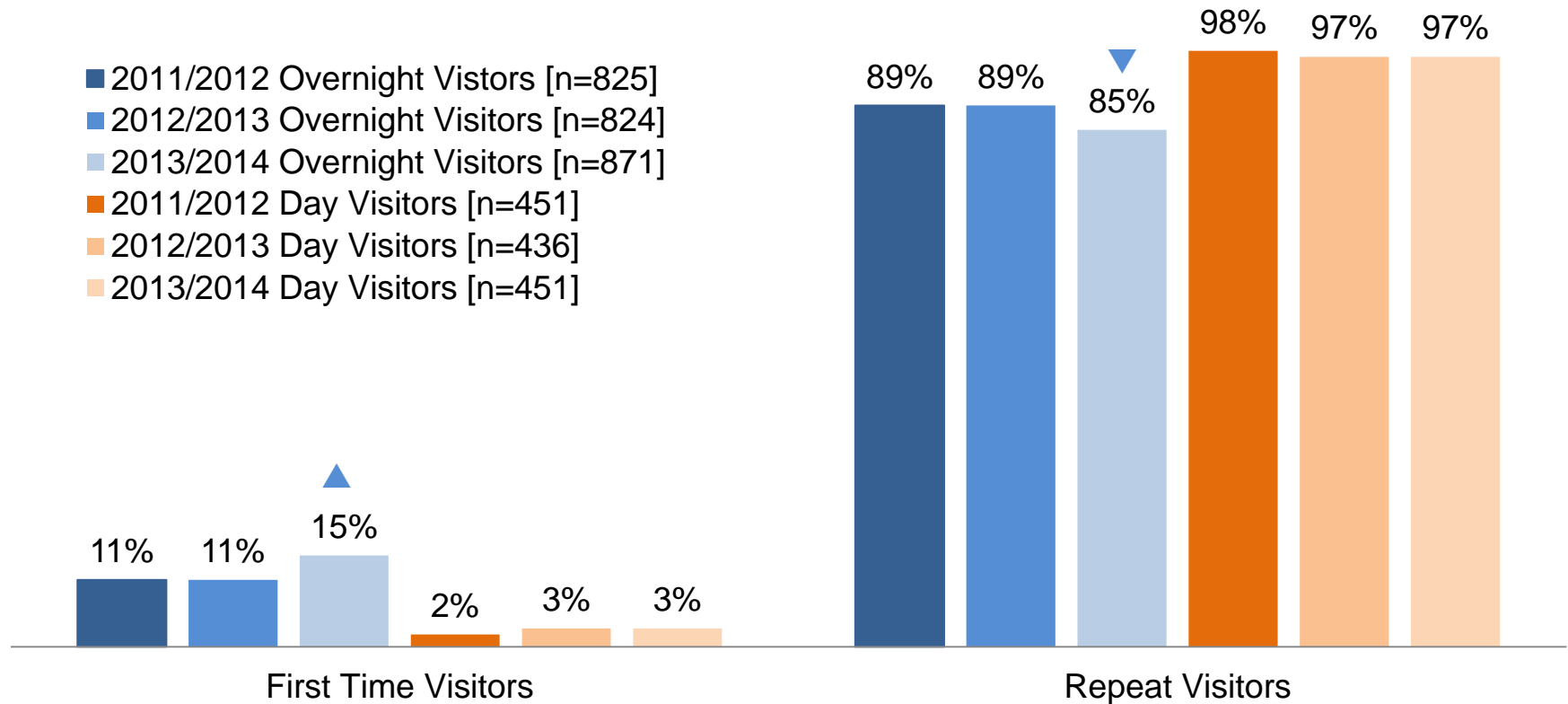


MA and ME source the greatest proportions of winter day visitors to Maine, consistent with prior winter seasons.



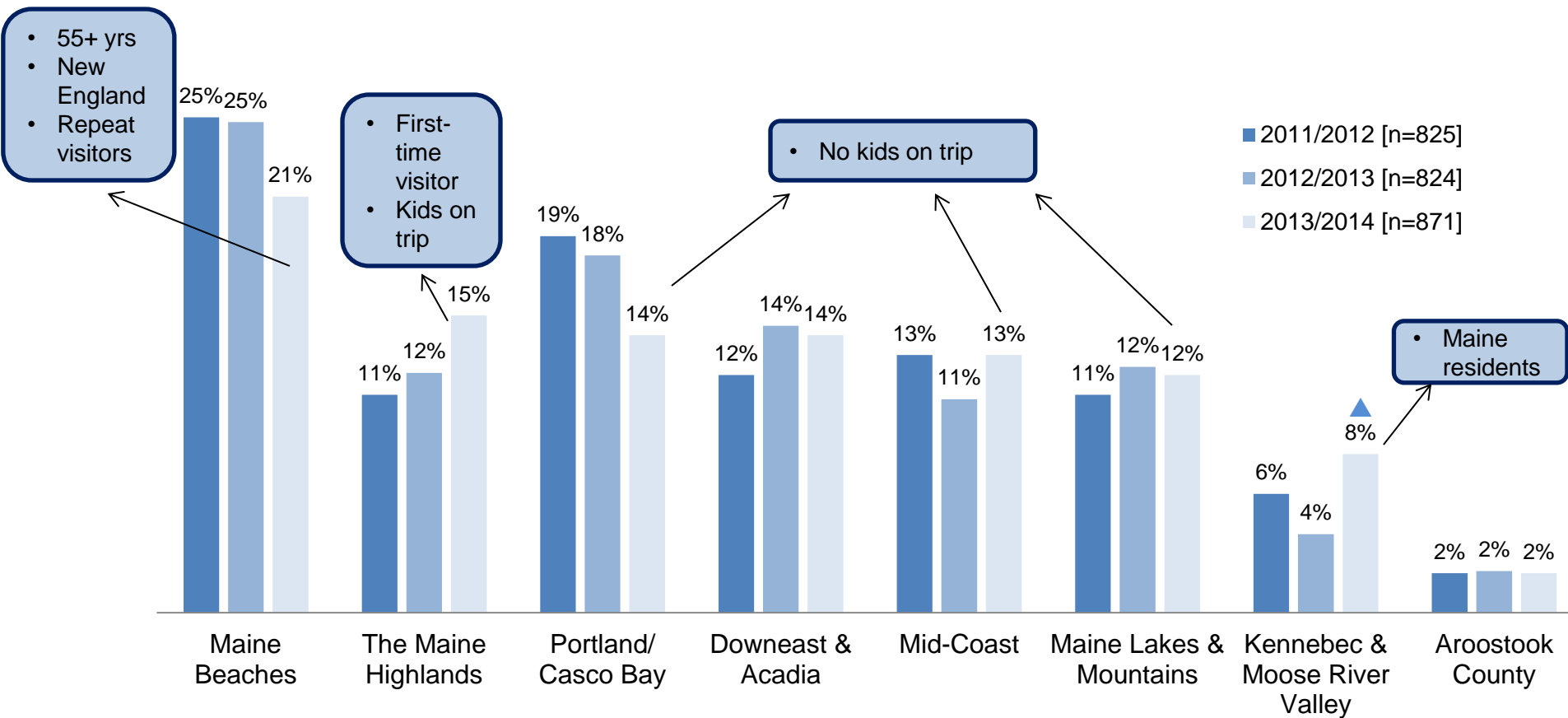
The 2014 winter season saw a small uptick in the proportion of first-time overnight visitors.

- Both overnight and day repeat visitors are more likely to have higher annual household incomes.
- Overnight visitors arriving from outside of Maine and New England, as well as those with children, are more likely to be visiting Maine for the first time.



The Maine Beaches region was visited by one-fifth of Maine's overnight visitors during the 2014 winter season.

- The sub-groups of visitors that are more likely to visit some of Maine's tourism regions are illustrated in the chart below.

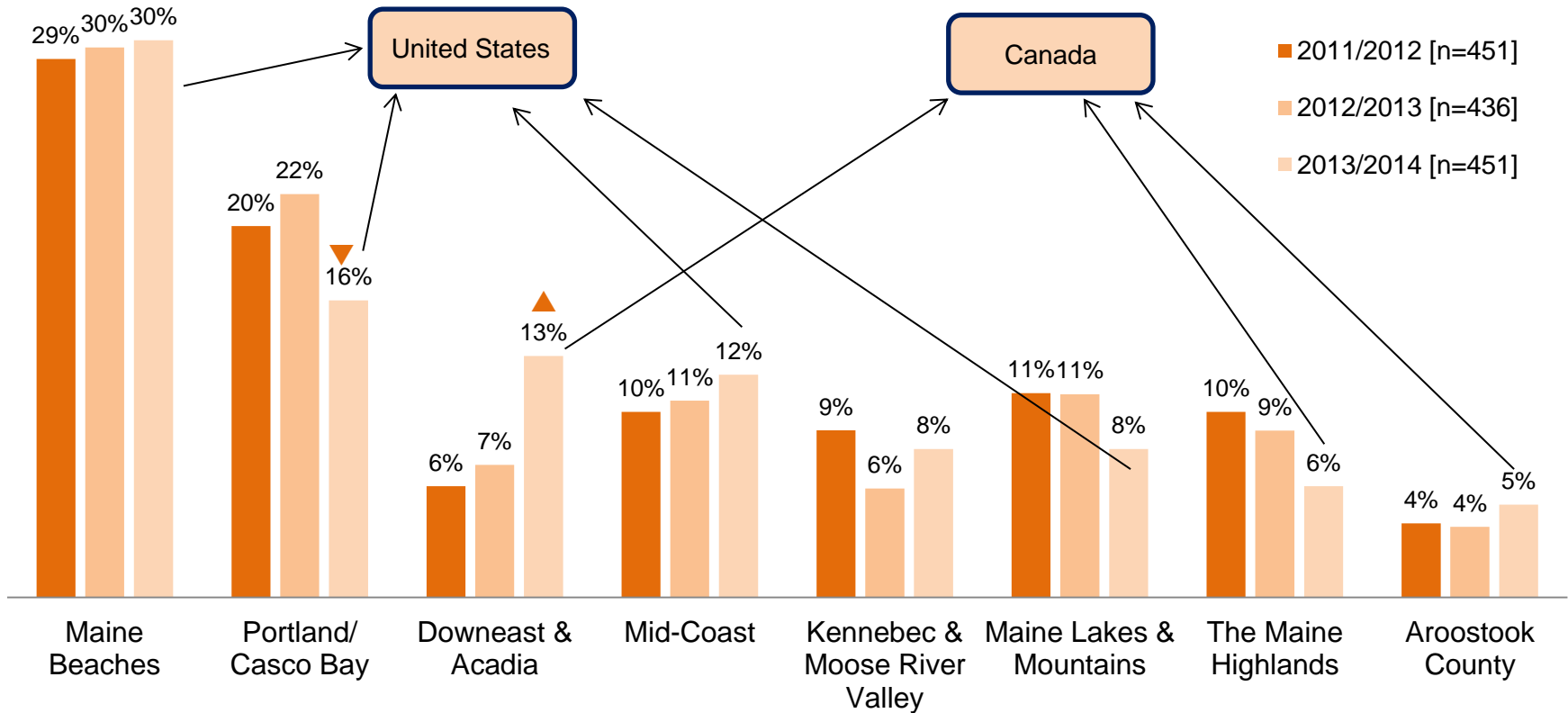


Overnight Q22. What region in Maine was your primary destination?

▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Maine's winter day visitors are also most likely to be visiting the Maine Beaches region.

- The Greater Portland region experienced a decrease in the proportion of day visitors it attracted during the 2014 winter season, while the Downeast/Acadia region saw an increase.
- The popularity of various regions differs between US residents and Canadian visitors, as shown in the chart below.

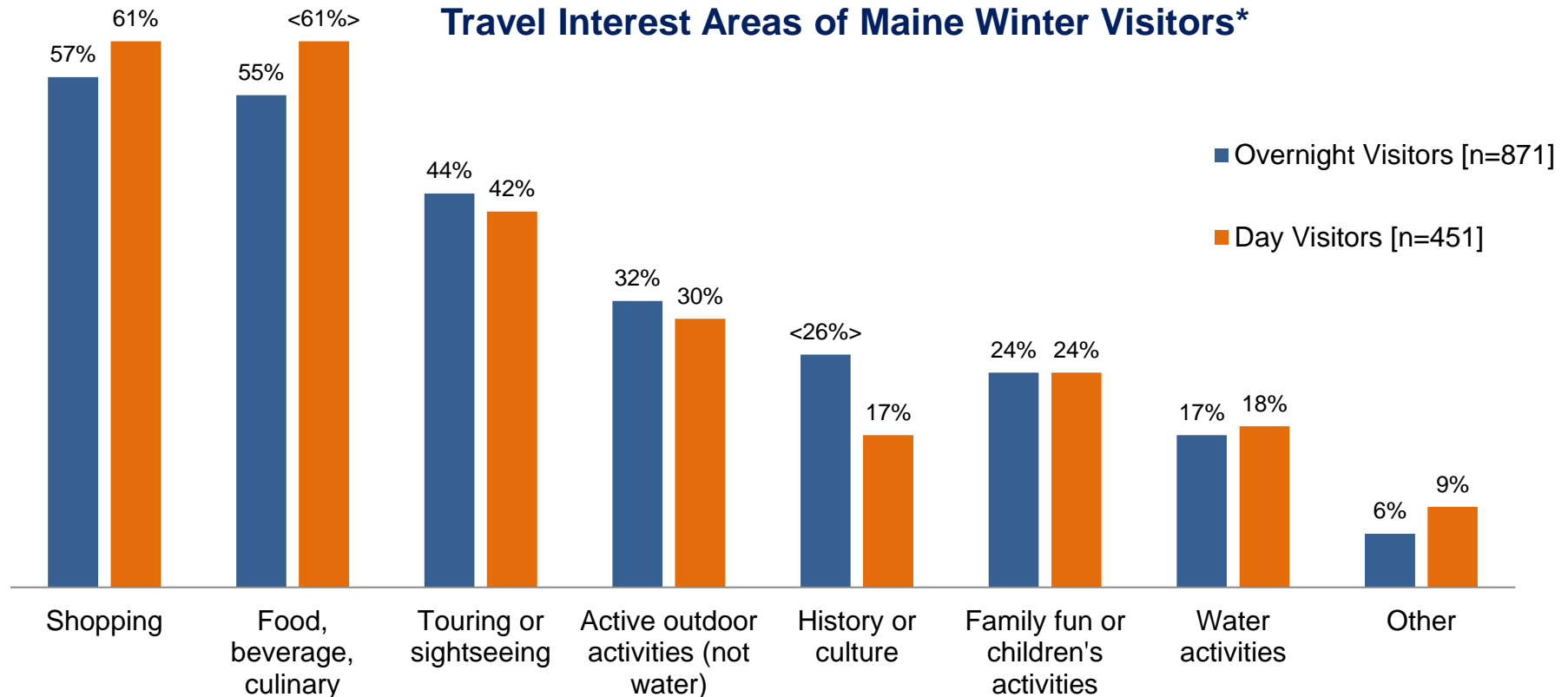


Day Q20. What region in Maine was your primary destination?

▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Most winter visitors to Maine were interested in shopping or exploring the various food/beverage/culinary options while visiting.

- Day visitors are more likely than overnight visitors to be interested in *food, beverage, or culinary activities* while visiting Maine.
- Overnight visitors are more likely to be interested in *history or culture activities* than are day visitors.



Overnight Q29/Day Q17: Which of the following interest areas did you want to pursue during this trip to Maine?

* This is a new question added in January 2014; therefore, there is no comparison to prior years.

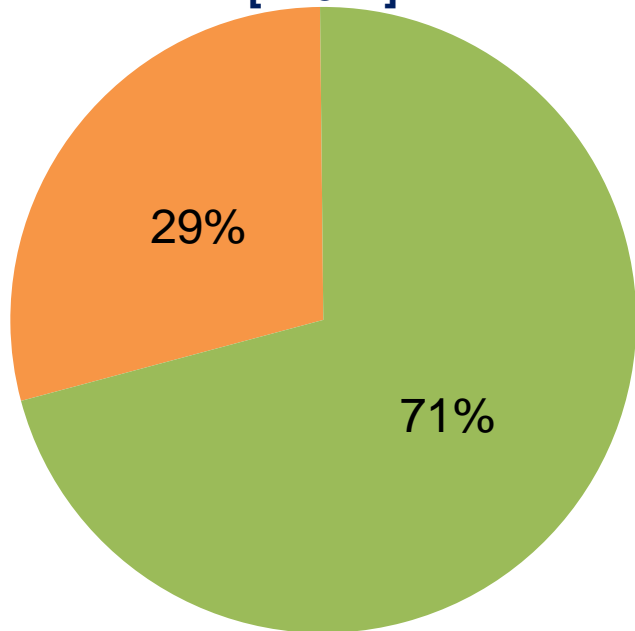
< > signifies a significant difference between subgroups at the 95% confidence level

Nearly three-fourths of overnight winter visitors are lodging in paid accommodations, mostly staying at hotels/motels/resorts.

- The average length of stay in Maine is longer among visitors from outside Maine and New England (3.8 nights), first-time visitors (3.5 nights), and those traveling with children (3.4 nights).

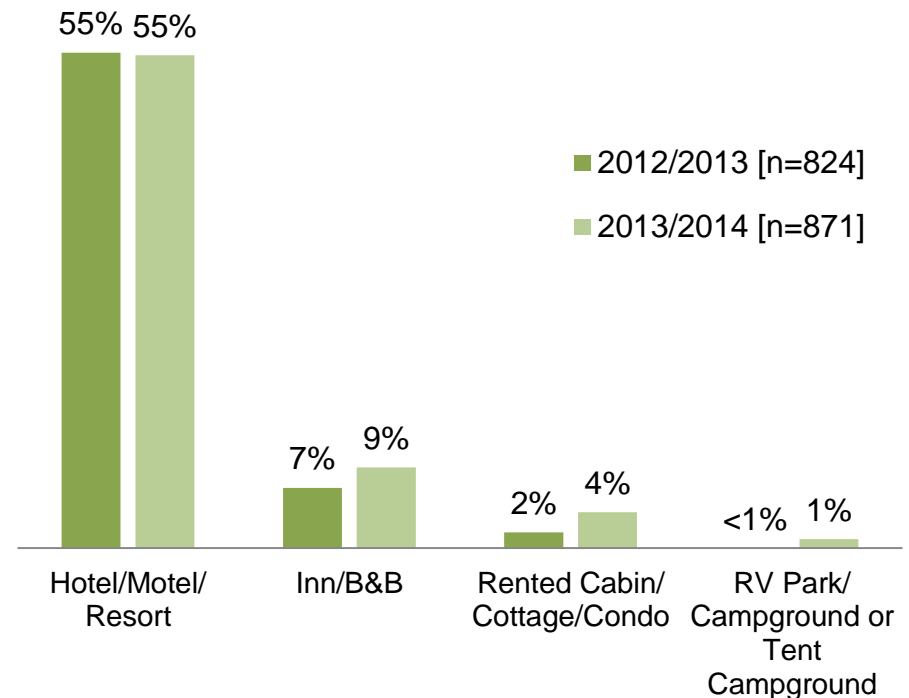
Type of Accommodation

[n=871]



■ Unpaid Accommodations ■ Paid Accommodations

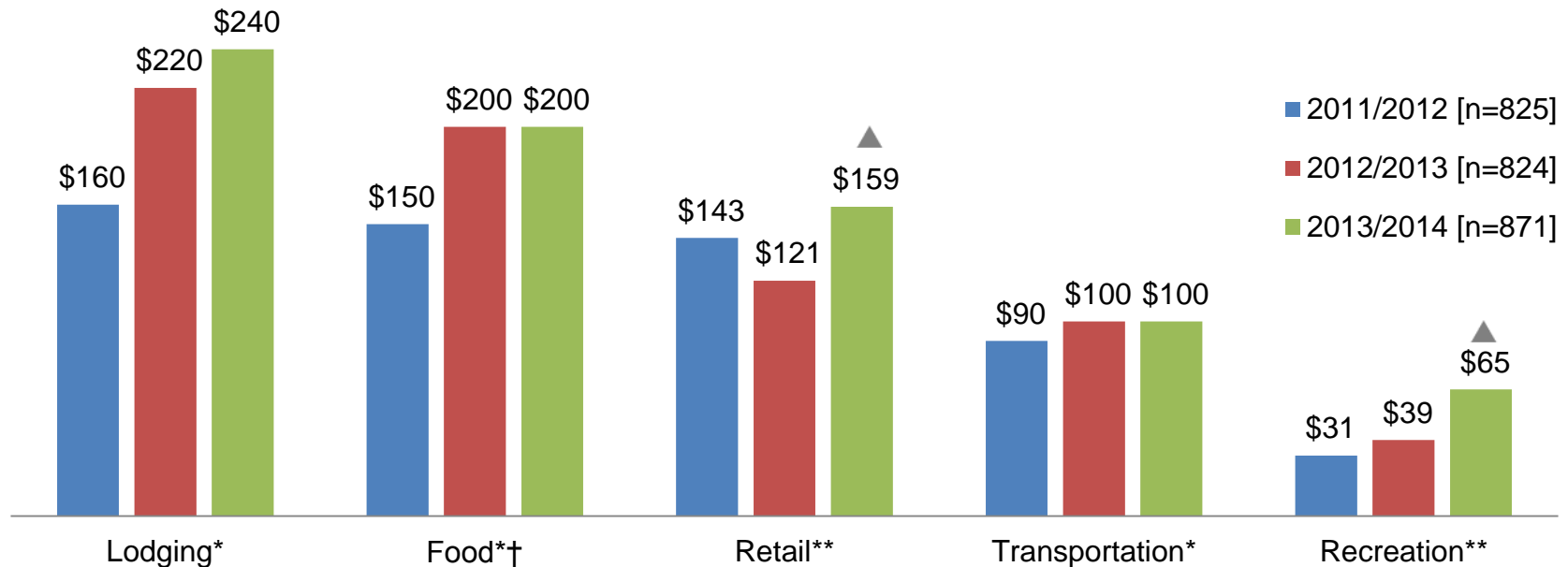
Type of Paid Accommodation



Average Length of Stay: 3.1 Nights

Lodging and food expenditures make up the greatest share of expenditures among winter overnight visitors.

Average Spending per Travel Party – Overnight Visitors



*Median Expenditures

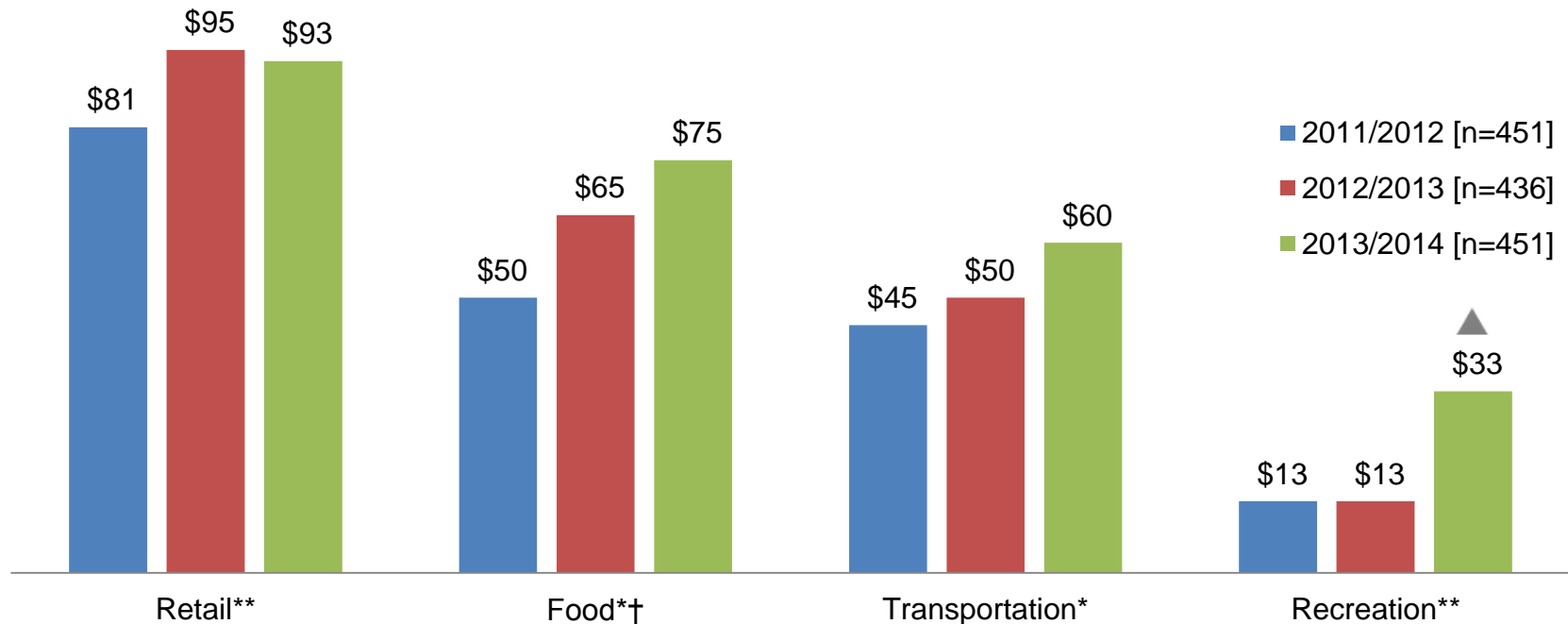
**Mean Expenditures. The 2014 questionnaire included additional examples of Retail and Recreation expenditure items that weren't included in prior versions of the questionnaire. Comparisons to prior years must be done cautiously.

†Food expenditures from 2011 and 2012 are not directly comparable due to the addition of the "grocery" category in 2012.

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Day visitors spent the most on retail goods during the 2014 winter season, even more than they spent on food.

Average Spending per Travel Party – Day Visitors



*Median Expenditures

**Mean Expenditures. The 2014 questionnaire included additional examples of Retail and Recreation expenditure items that weren't included in prior versions of the questionnaire. Comparisons to prior years must be done cautiously.

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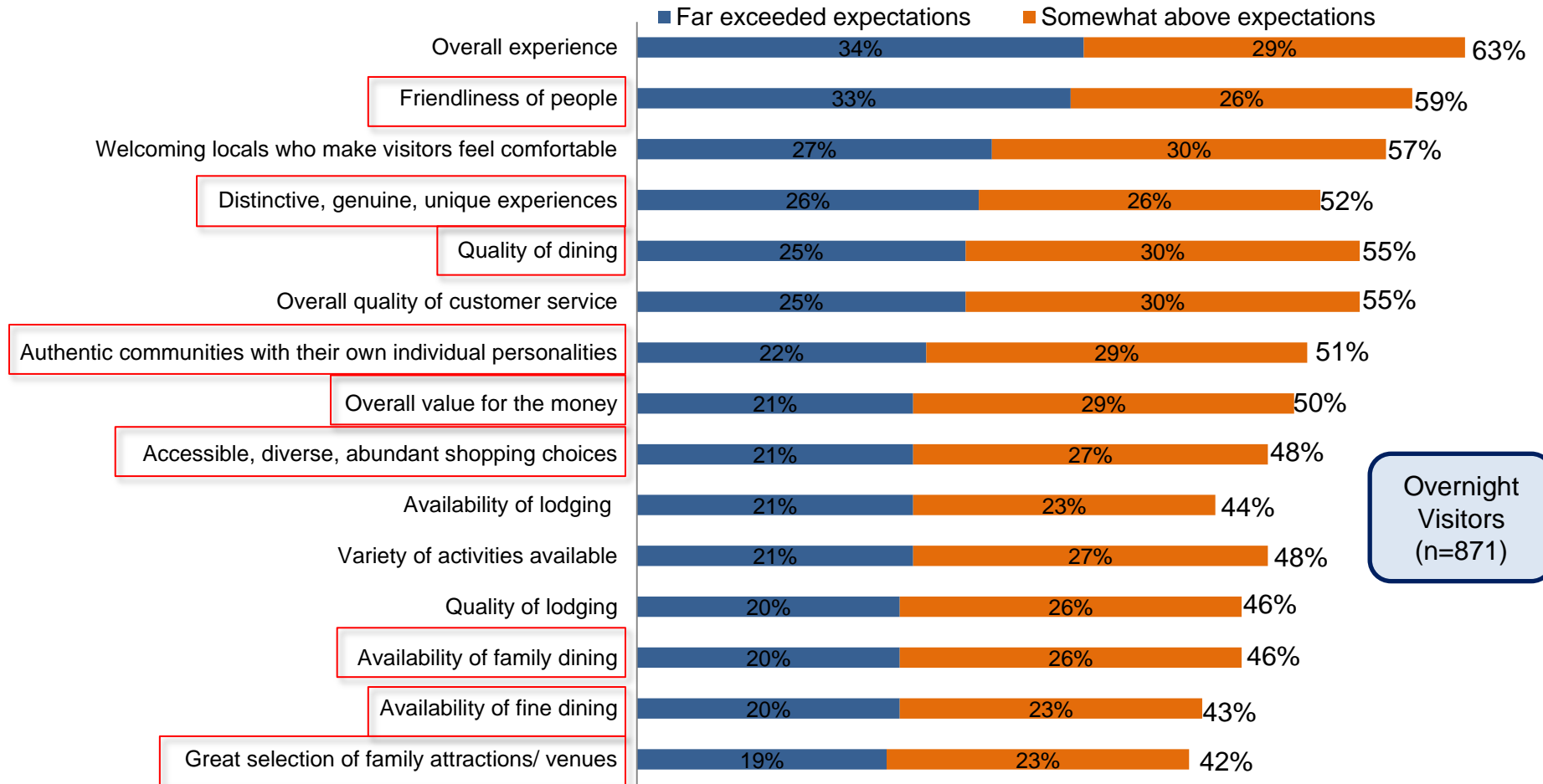
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Trip Evaluation



Two-thirds of winter overnight visitors found their overall experience visiting Maine to exceed their expectations.

- First-time visitors are more likely to indicate that their trip in Maine exceeded their expectations for several items (indicated with red boxes).

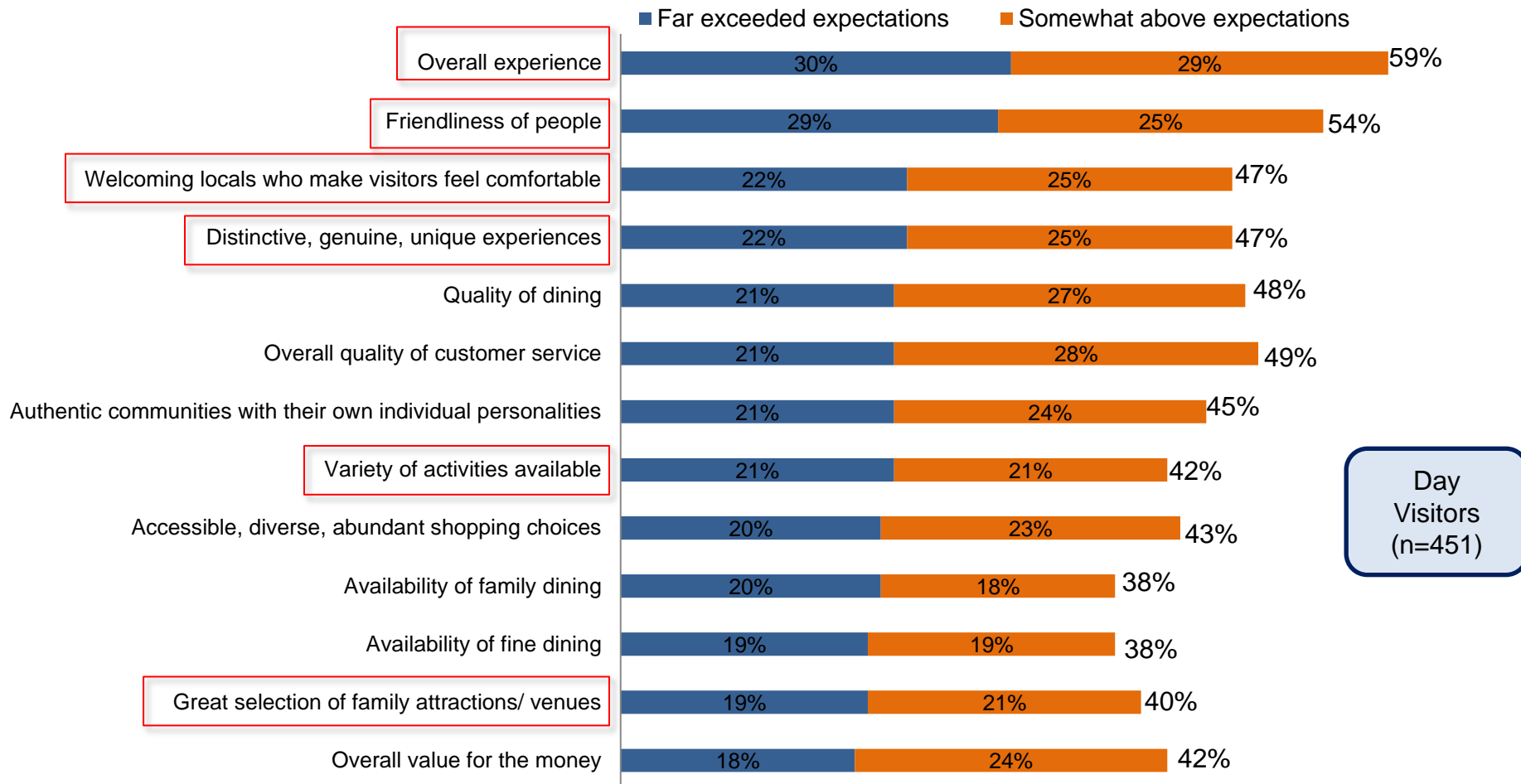


Overnight Q35: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

* New question added in January 2014; therefore, there is no comparison to prior years.

Though not as high as for overnight visitors, three in five day visitors to Maine state that their *overall experience* exceeded their expectations.

- Visitors under the age of 35 are more likely to indicate that their day trip in Maine exceeded their expectations for several items (indicated with red boxes).



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

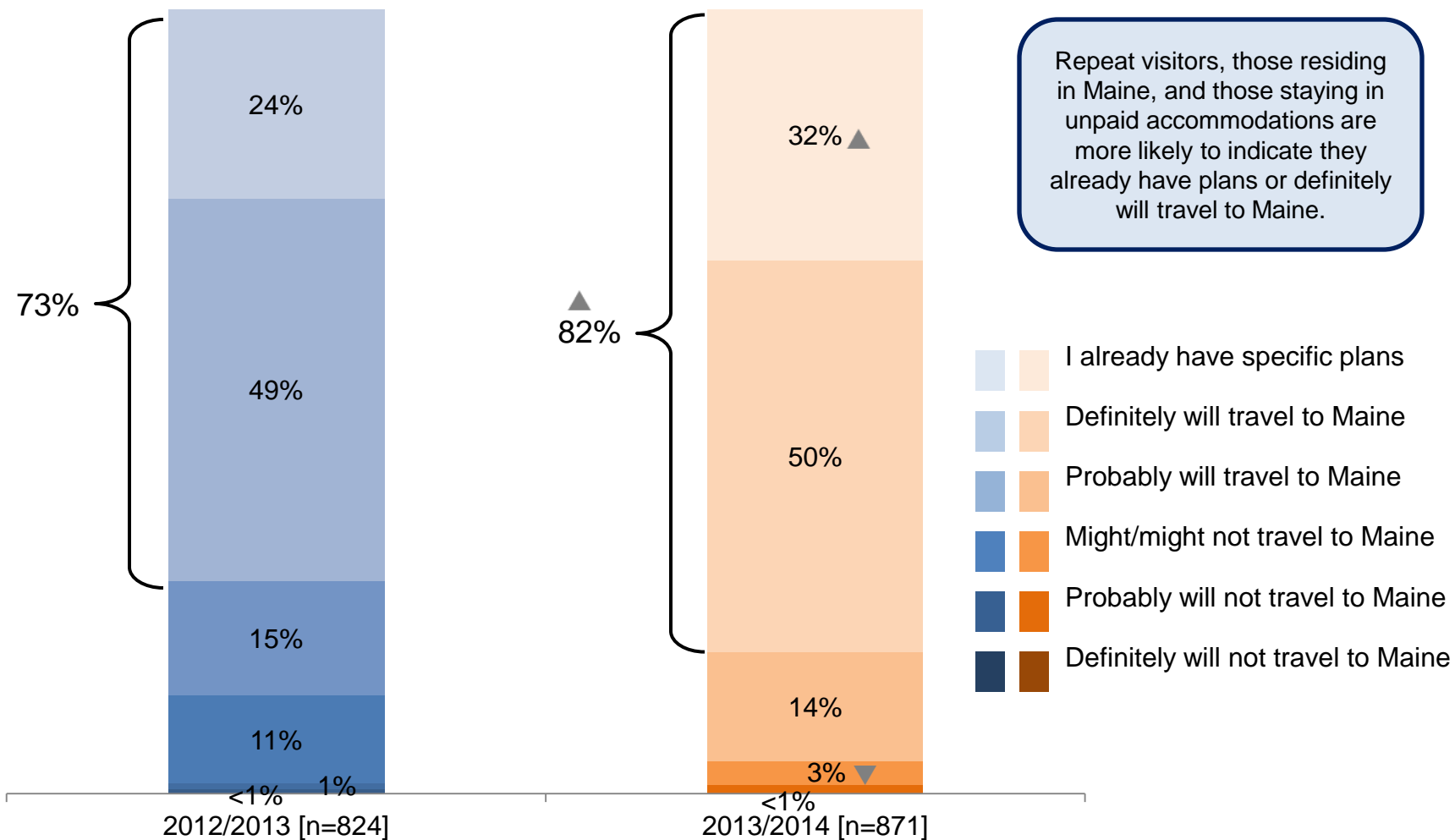
* New question added in January 2014; therefore, there is no comparison to prior years.

Future Travel



One-third of Maine's overnight winter visitors already have specific plans to visit Maine again.

Likelihood of Trip to Maine in Next Two Years

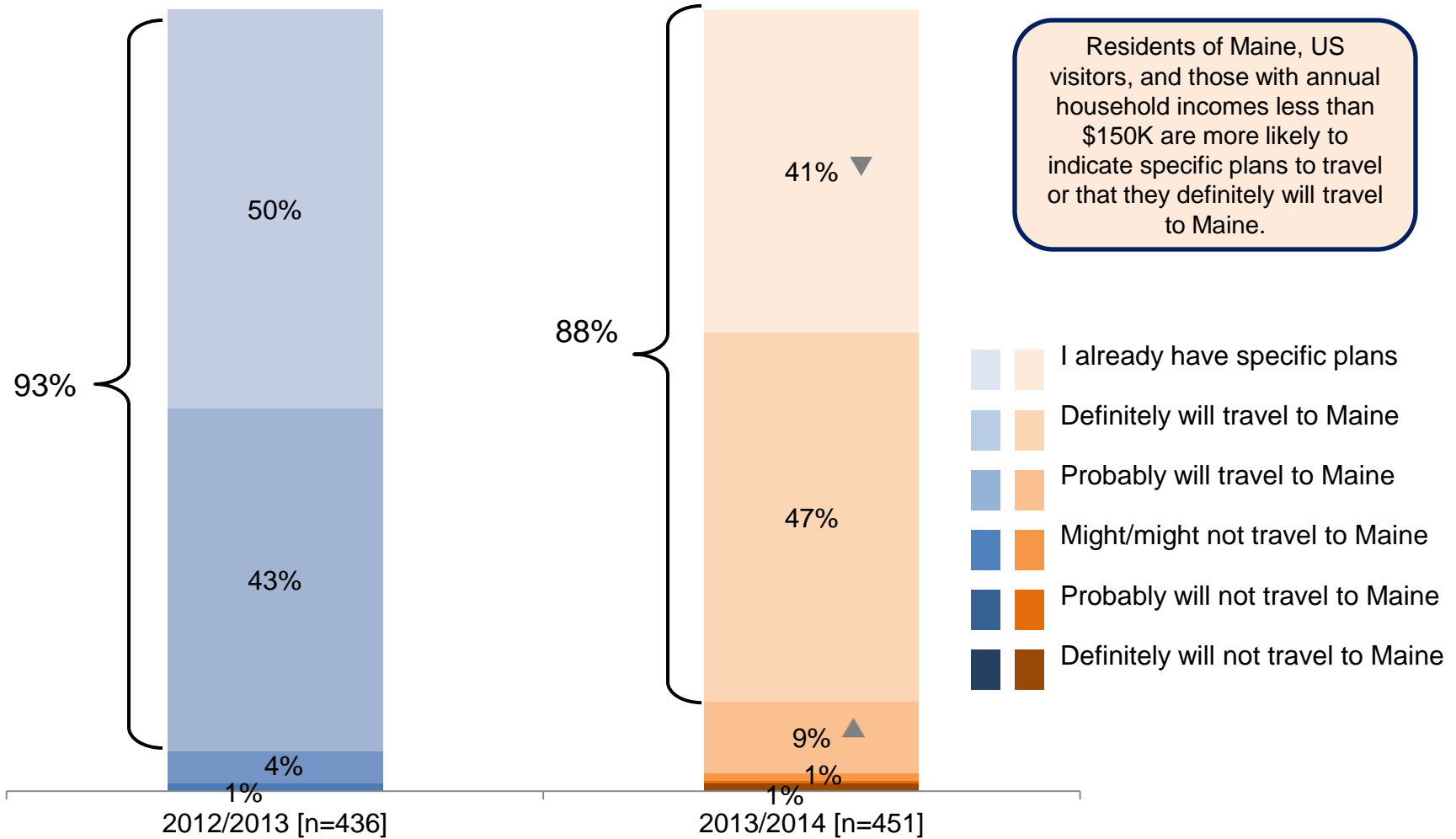


Overnight Q38. How likely will you be to travel in Maine in the next two years?

▲▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Nearly nine in ten winter day visitors either have specific plans to return to Maine or indicate that they definitely will visit again.

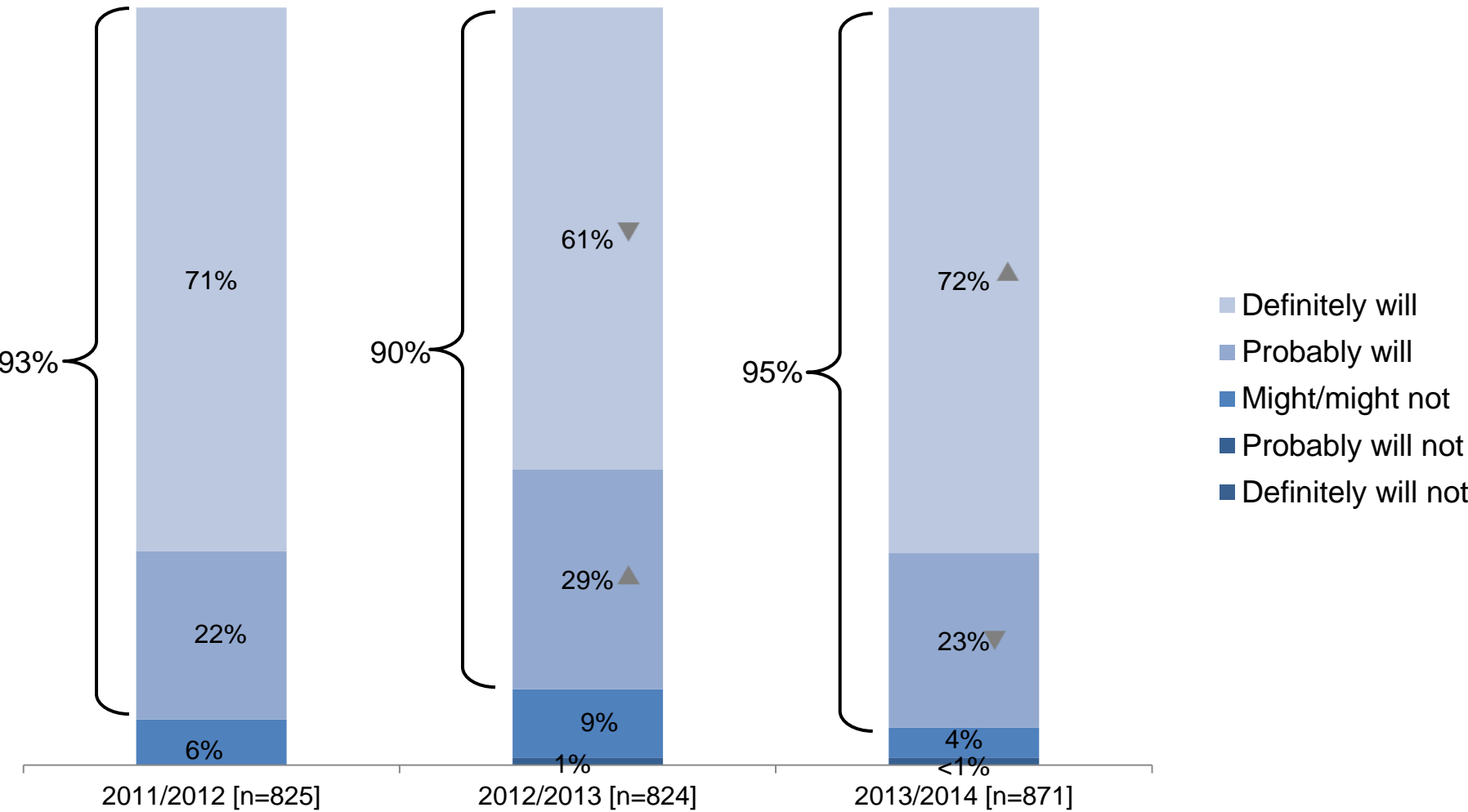
Likelihood of Trip to Maine in Next Two Years



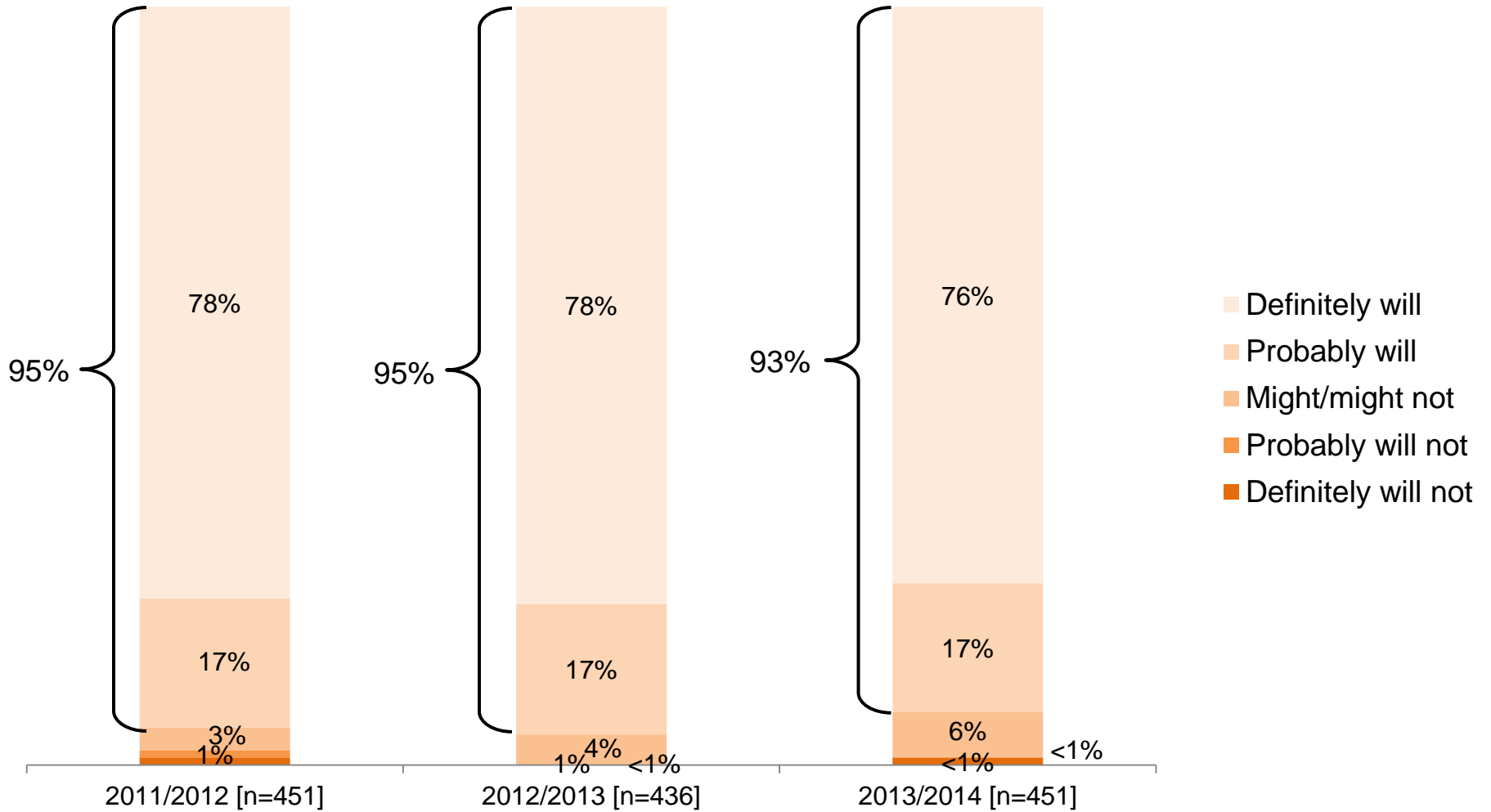
Day Q30. How likely will you be to travel in Maine in the next two years?

▲▼ notes significant difference between 2013 and 2014 at the 95% confidence level

More than nine in ten overnight winter visitors indicate they will recommend Maine as a vacation destination to friends/relatives.



Day visitors are similarly enthusiastic about their Maine vacation, with 93% indicating a likelihood to recommend Maine as a vacation destination.



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

▲ ▼ notes significant difference between the current and prior year at the 95% confidence level



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