

Maine Office of Tourism Visitor Tracking Research

Summer 2014 Seasonal Topline

Prepared by



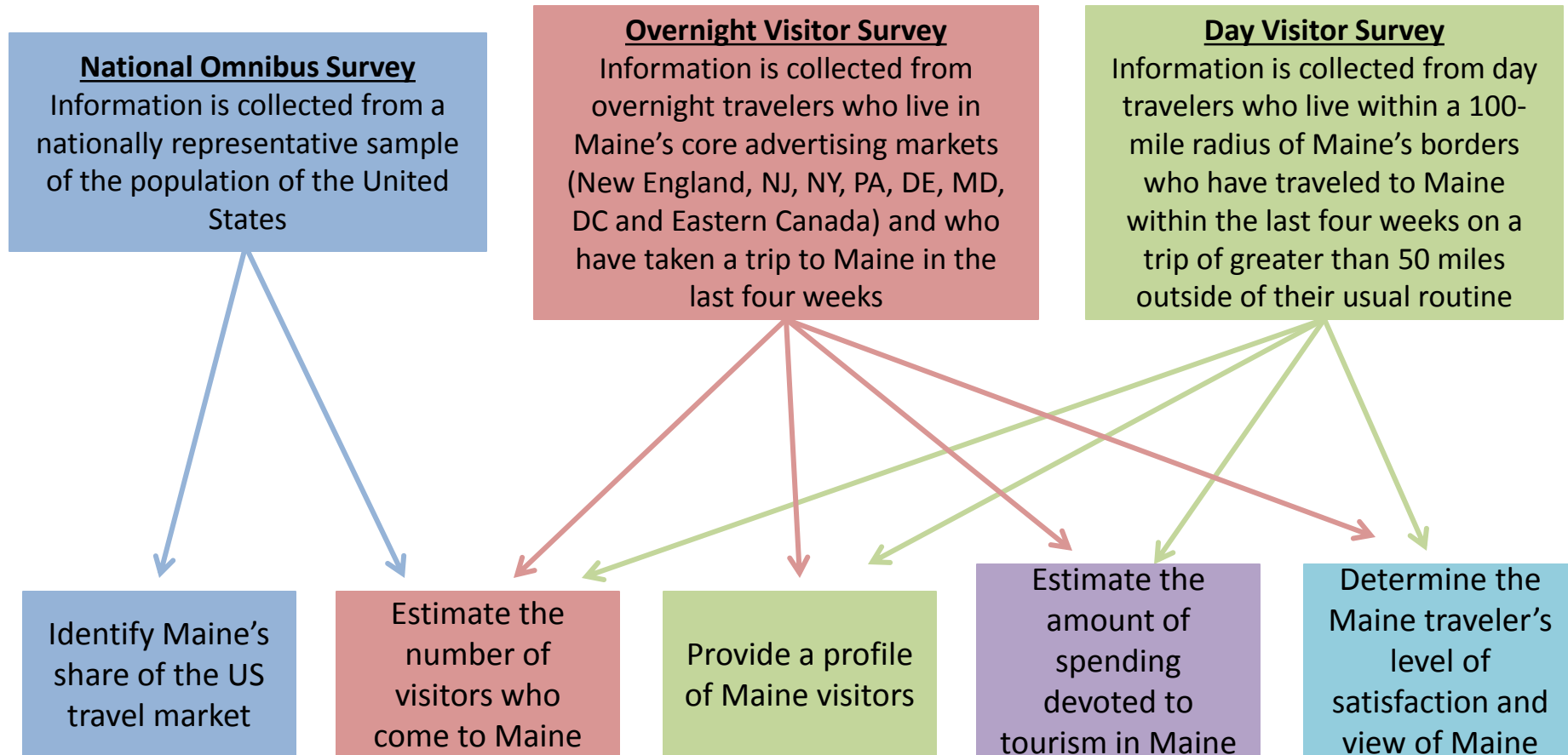
October 2014

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 May through August 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 May to August 2014 was stable when compared with the two prior summer seasons. Similarly, Maine experienced no change in tourism-related overnight visitation to the State.
- Day visitation to Maine once again experienced an increase over the 2013 summer season, with 6.9% more day visitors coming to Maine during this recent summer season than during the prior summer. This follows a Winter/Spring 2014 season that saw a year-over-year increase in day visitation to the State. While the day visitor is certainly a valuable asset of the Maine tourism product, additional marketing aimed at drawing these visitors in for a night or two could bring more tourism dollars into the State through the additional dining and lodging expenses incurred when staying overnight. This subset of potential overnight visitors are already “fans” of Maine and would likely take less convincing to stay a while longer than other travelers.

Executive Summary

- Following continual year-over-year increases in the proportion of overnight visitation from Canada during 2012, the Summer 2013 season hinted at a leveling off of these gains. The Winter/Spring 2014 season then followed with a decrease in the proportion of overnight visitors arriving from Canada, as did this most recent Summer 2014 season. The less favorable Canadian exchange rate may play a role, considering Canadians' high propensity to shop and stay in paid accommodations while visiting Maine. This two-season decrease may be an indicator of continual drops in the proportion of Canadian visitation to the previously seen levels of 2010 and 2011. Visitation estimates for the Fall 2014 season will provide more stability in any conclusions to be drawn from these changes.
- The proportion of visitors coming to Maine for the first time this past summer is higher than for last summer (2013) and continues a year-over-year increase also seen during the Winter/Spring 2014 season. These first-time visitors tend to come from further away (outside New England) and stay in paid accommodations, representing an attractive market for Maine. Interestingly, they are more likely to indicate that several aspects of their Maine vacation exceeded their expectations, yet less likely to state future intent to visit the State. Further exploration into their experiences and any potential blocks to future visitation to the State is warranted in order to examine ways in which to entice them to return to Maine after their first visit.

Executive Summary

- Not surprisingly, the Maine Beaches region continues to be the State's main draw during the summer season, with 26% of overnight visitors and 36% of day visitors listing this region as their primary destination in Maine. This region is most popular among repeat visitors, leisure travelers, and Canadians. The challenge of pulling these beach visitors further into the State remains.
- 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. Similar to the recent 2014 Winter/Spring season, more than half of summer overnight visitors stated that their vacation exceeded their expectations for *overall experience, 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 *overall experience, friendliness of the people, and welcoming locals who make visitors feel comfortable*.

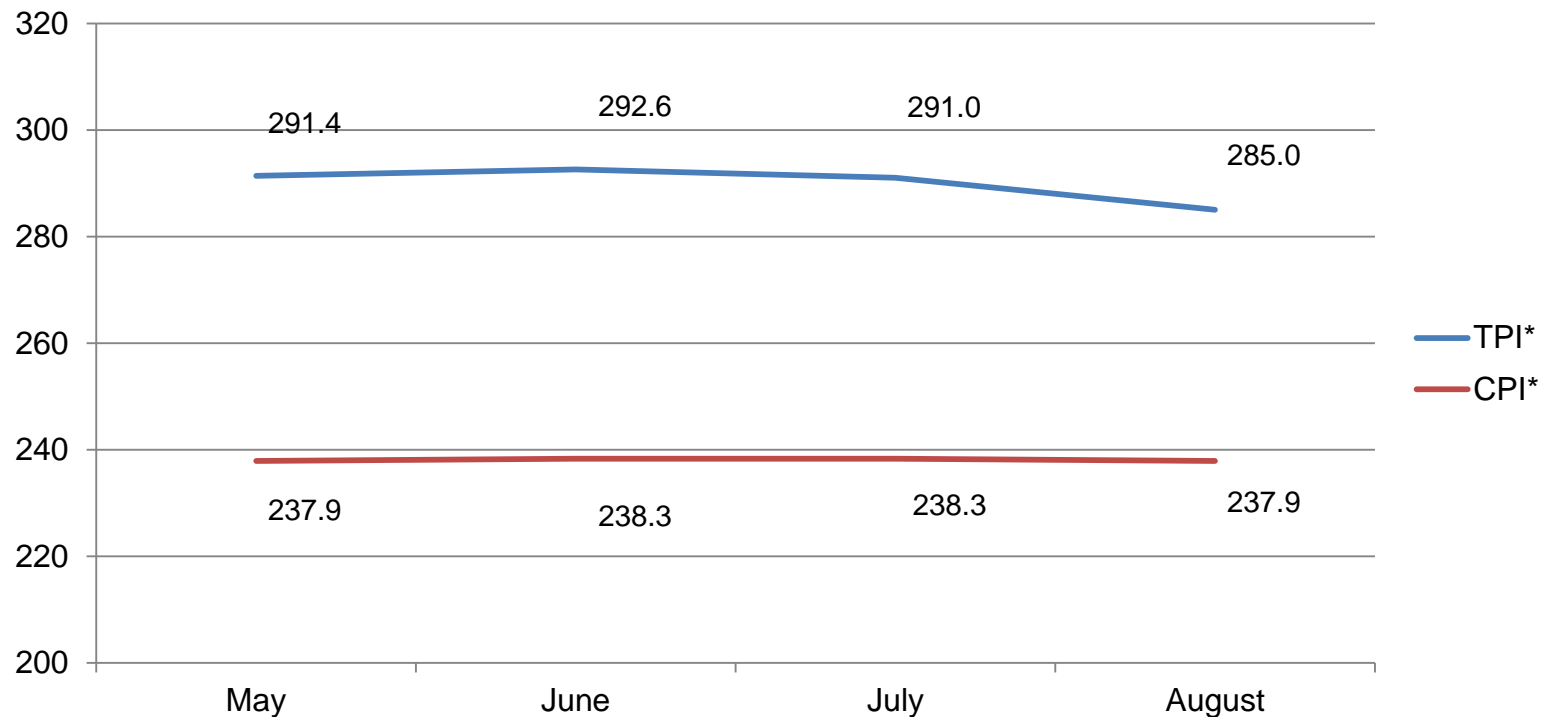
2014 Summer Season Travel Context



Travel Price Index continues to exceed the Consumer Price Index, resulting in a continued high cost of travel.

- Though decreasing slightly as the summer progressed, TPI still remains above the Summer 2013 index (which averaged at 283.1).

Consumer Price Index and Travel Price Index



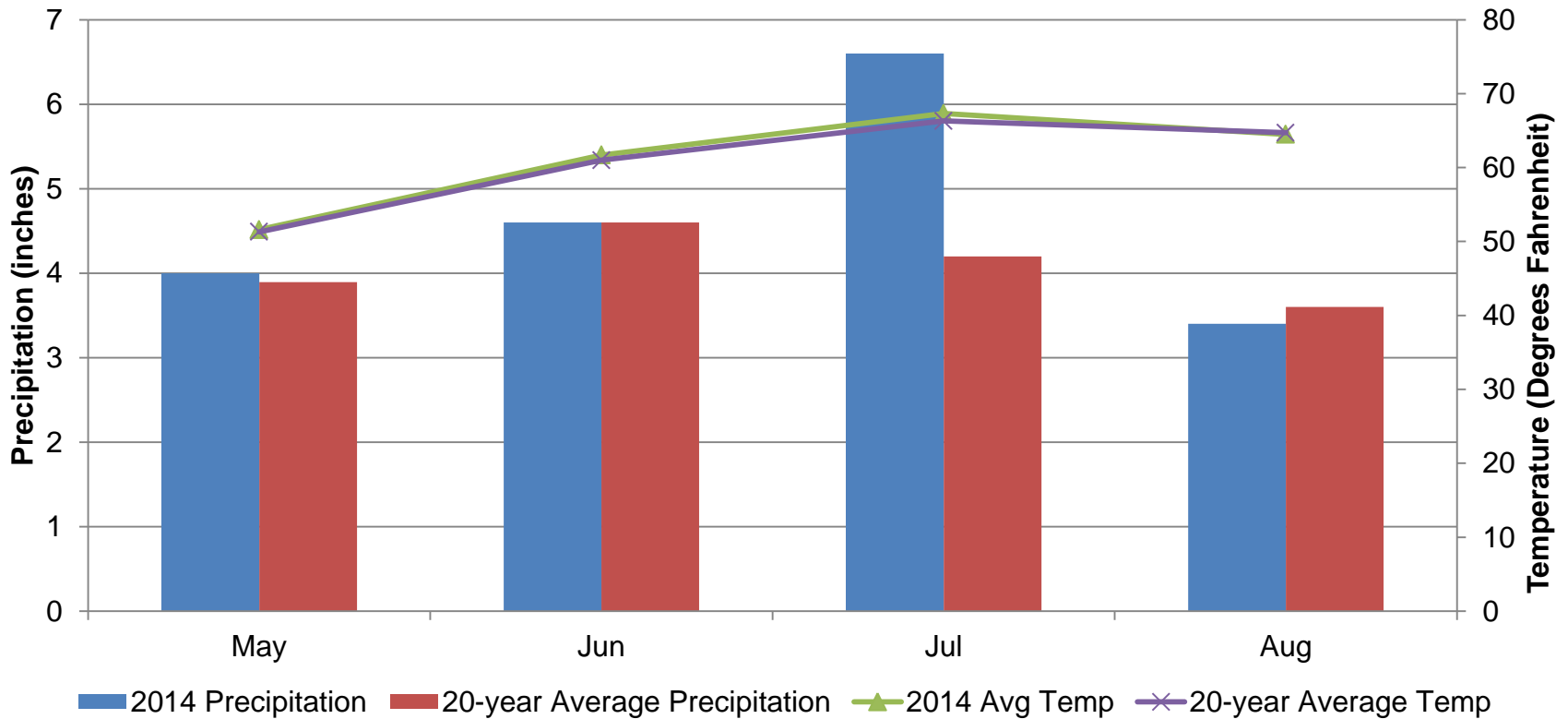
*Note: base years for Consumer Price and Travel Price Indices are 1982-1984=100

†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

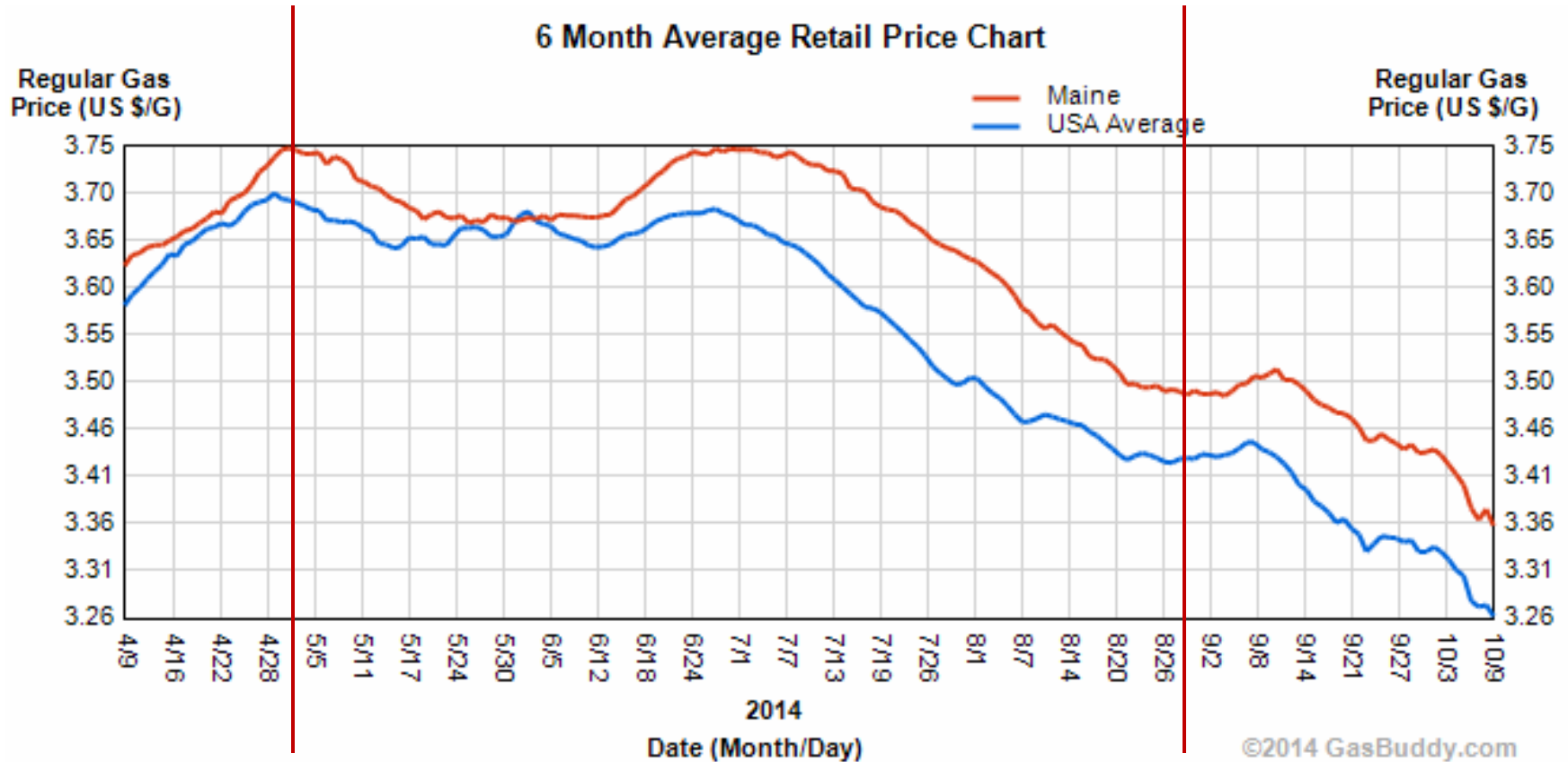
Maine precipitation above average for the month of July, with average temperatures equal to historical average.

Precipitation and Temperature – Maine Summer 2014



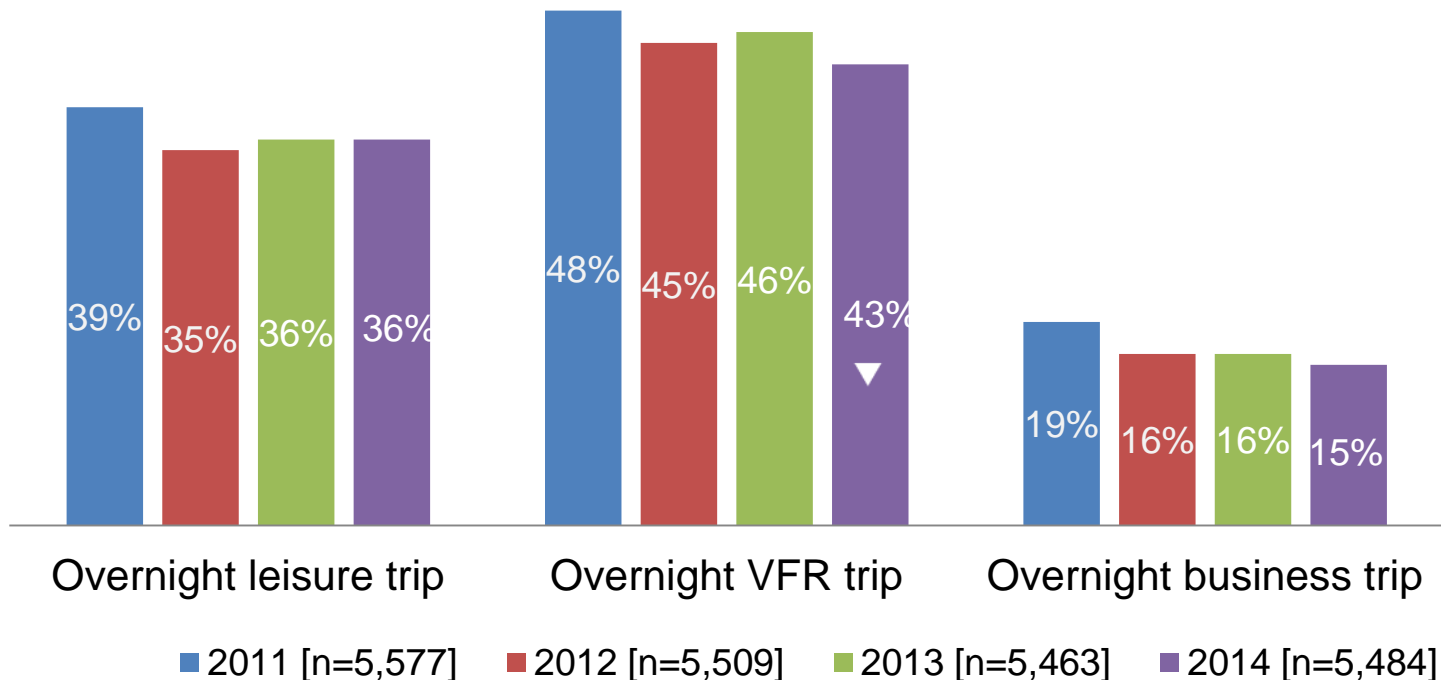
Maine gas prices continue to surpass US average prices during the Summer season, with the exception of the Memorial Day time period.

- The high price of gasoline in Maine and the US began to decline towards the end of the summer season. This price drop has continued into the Fall season.



Leisure and business travel nationwide remains stable with prior years, while a slight drop is seen in VFR travel.

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

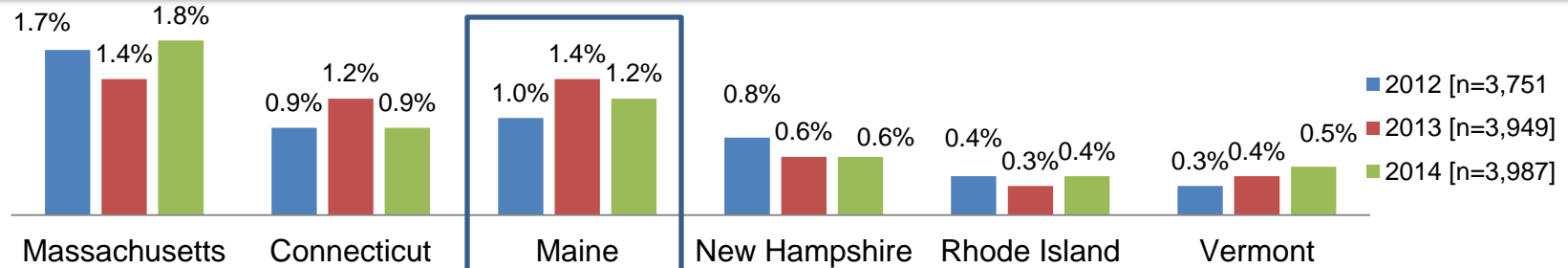


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

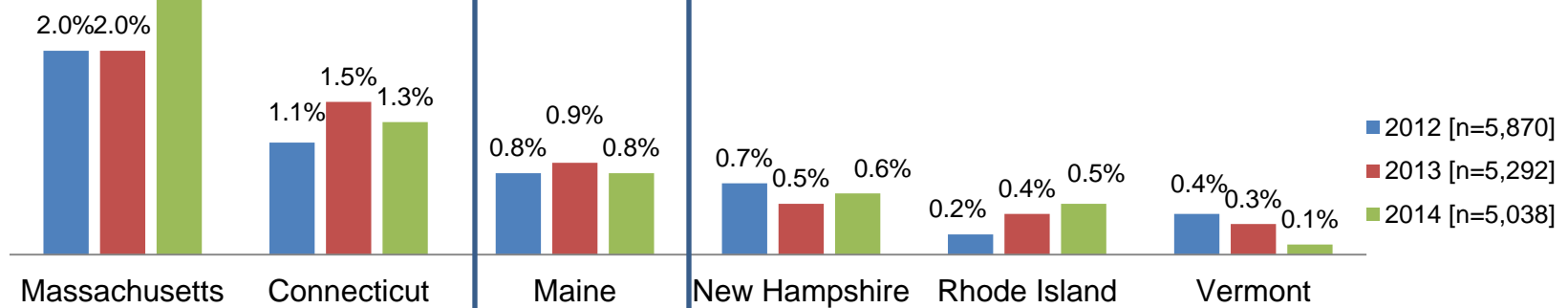
▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

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

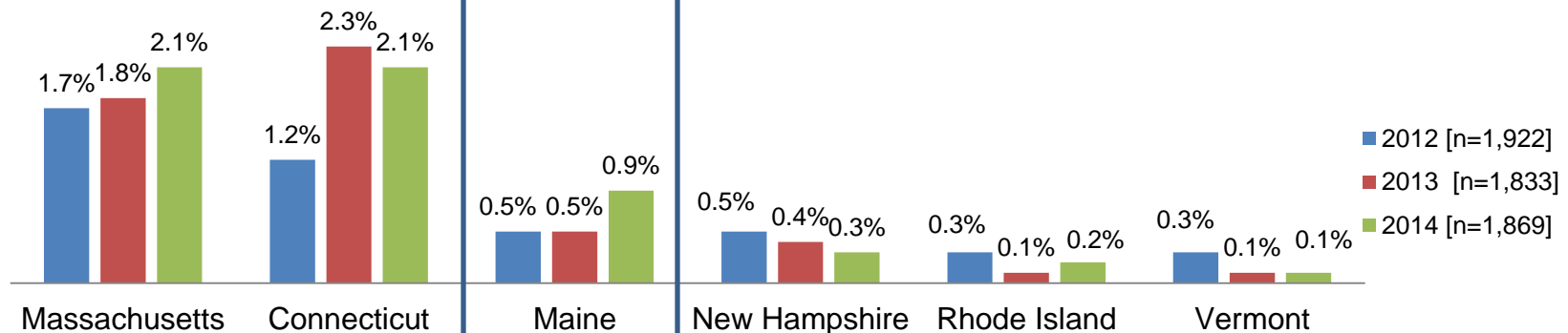
Overnight Leisure Trips



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

2014 Summer Season Highlights



Estimated overall visitation to Maine increased 4% between the 2013 and 2014 summer seasons.

- While overnight visitation estimates are flat between the prior and current summer seasons, day visitation continues to grow.

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

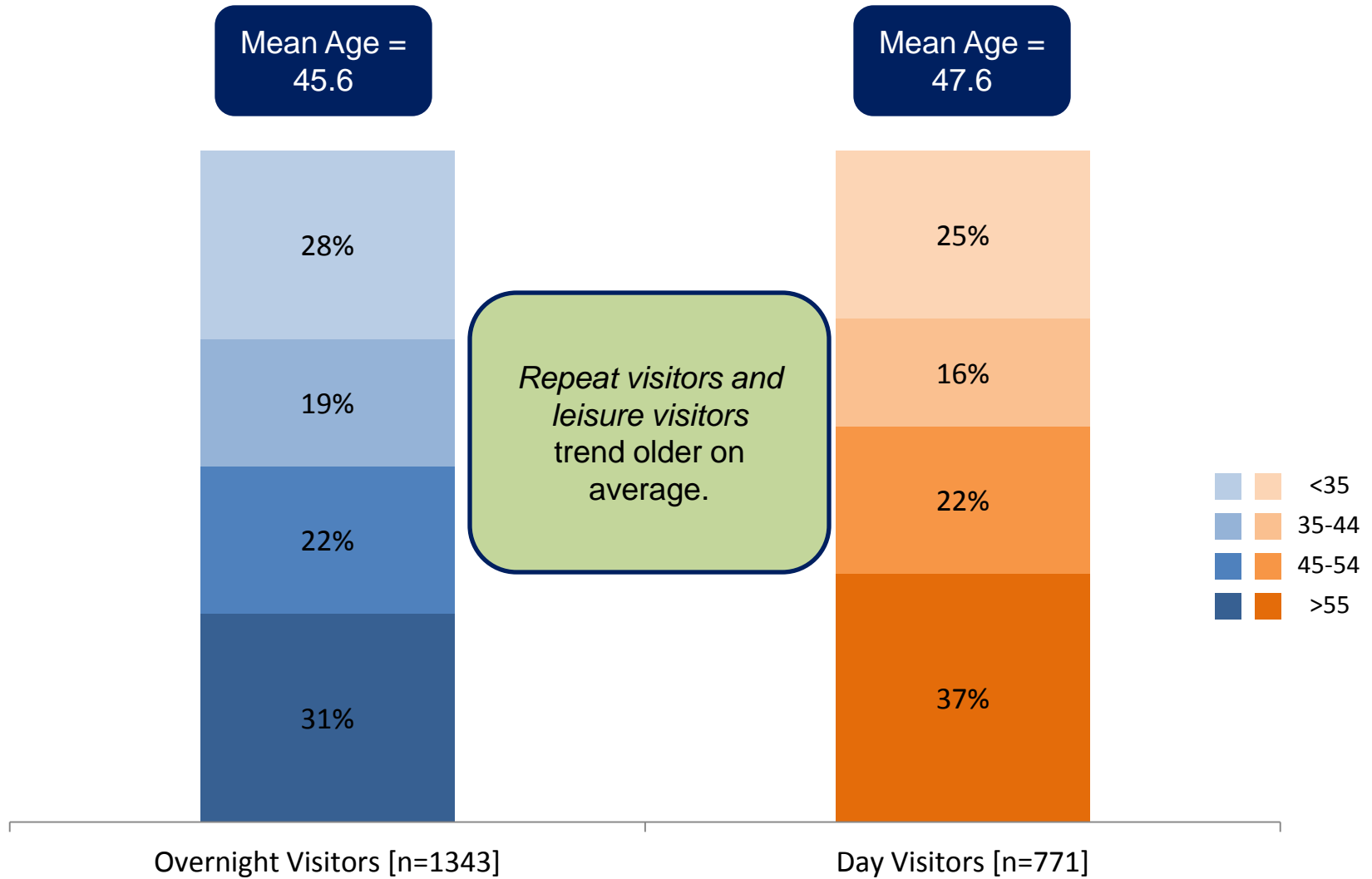
Visitation Estimates*	Summer 2013	Summer 2014	% Chg
Total Estimated Visitation	22,215,747	23,103,900	+4.0%
<i>Overnight Visitors</i>	<i>8,886,174</i>	<i>8,850,339</i>	<i>- 0.4%</i>
<i>Day Visitors</i>	<i>13,329,573</i>	<i>14,253,561</i>	<i>+6.9%</i>

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

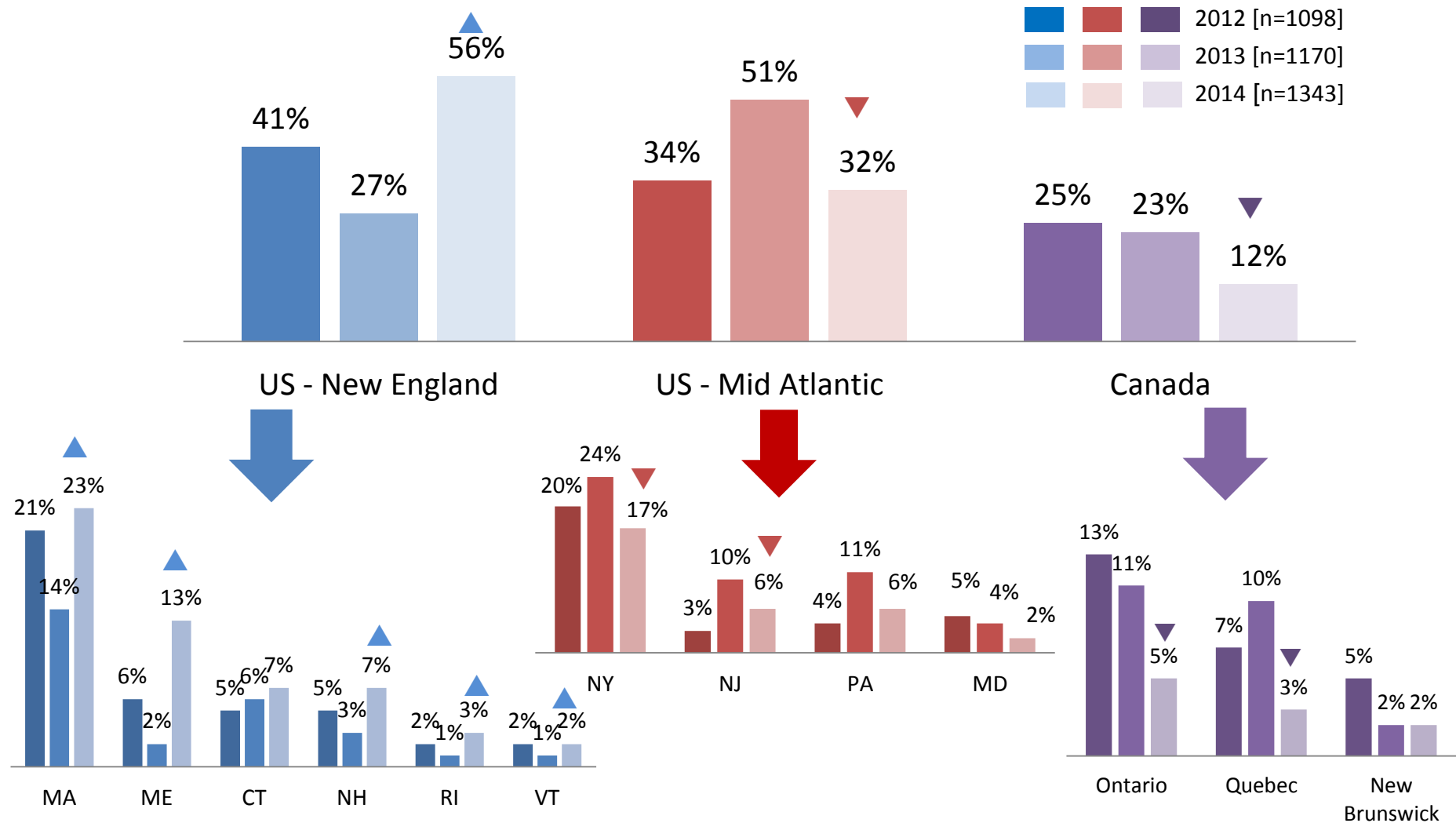
Tourism related trips include:

- 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 summer visitors average in their 40s and 50s, with day visitors slightly older than overnight visitors.

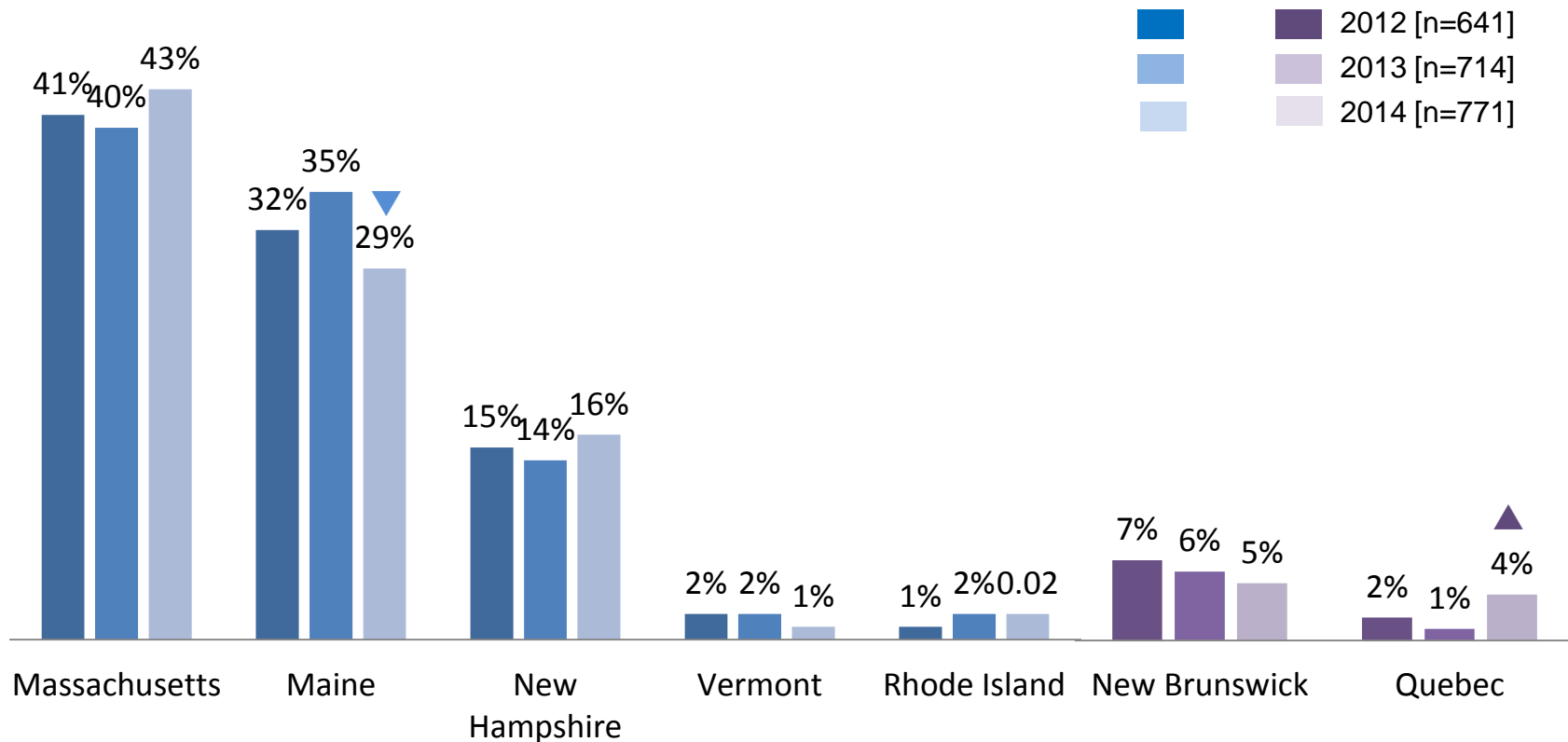


Summer 2014 showed a drop in the proportion of overnight visitors from Canada, similar to the year-over-year drop seen in the prior Winter/Spring season.



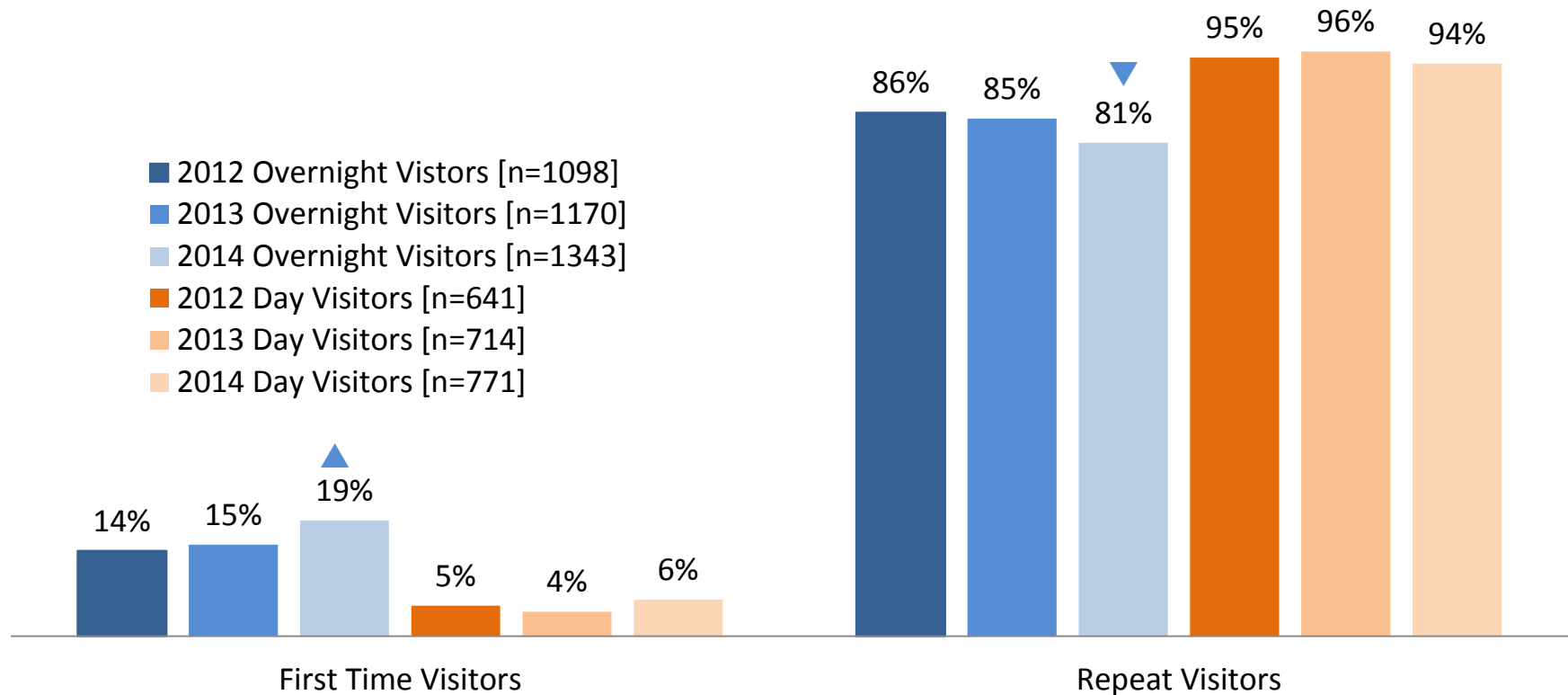
Massachusetts and Maine continue to source the greatest proportions of summer day visitors to Maine.

- Maine saw a slight decrease in the proportion of in-state summer day visitors when compared to last year, while showing a small increase in the proportion of day visitors from Quebec.



The 2014 summer season saw a slight increase in the proportion of first-time overnight visitors, similar to the Winter/Spring 2014 season.

- First time overnight and day visitors differ in their demographic attributes and travel patterns.
 - First time overnight visitors are more likely to be from outside of New England, stay in paid accommodations, travel with children, and be under the age of 45.
 - First time day visitors, on the other hand, are more likely to be from Maine and New England, 45 years of age and older, and traveling without kids.



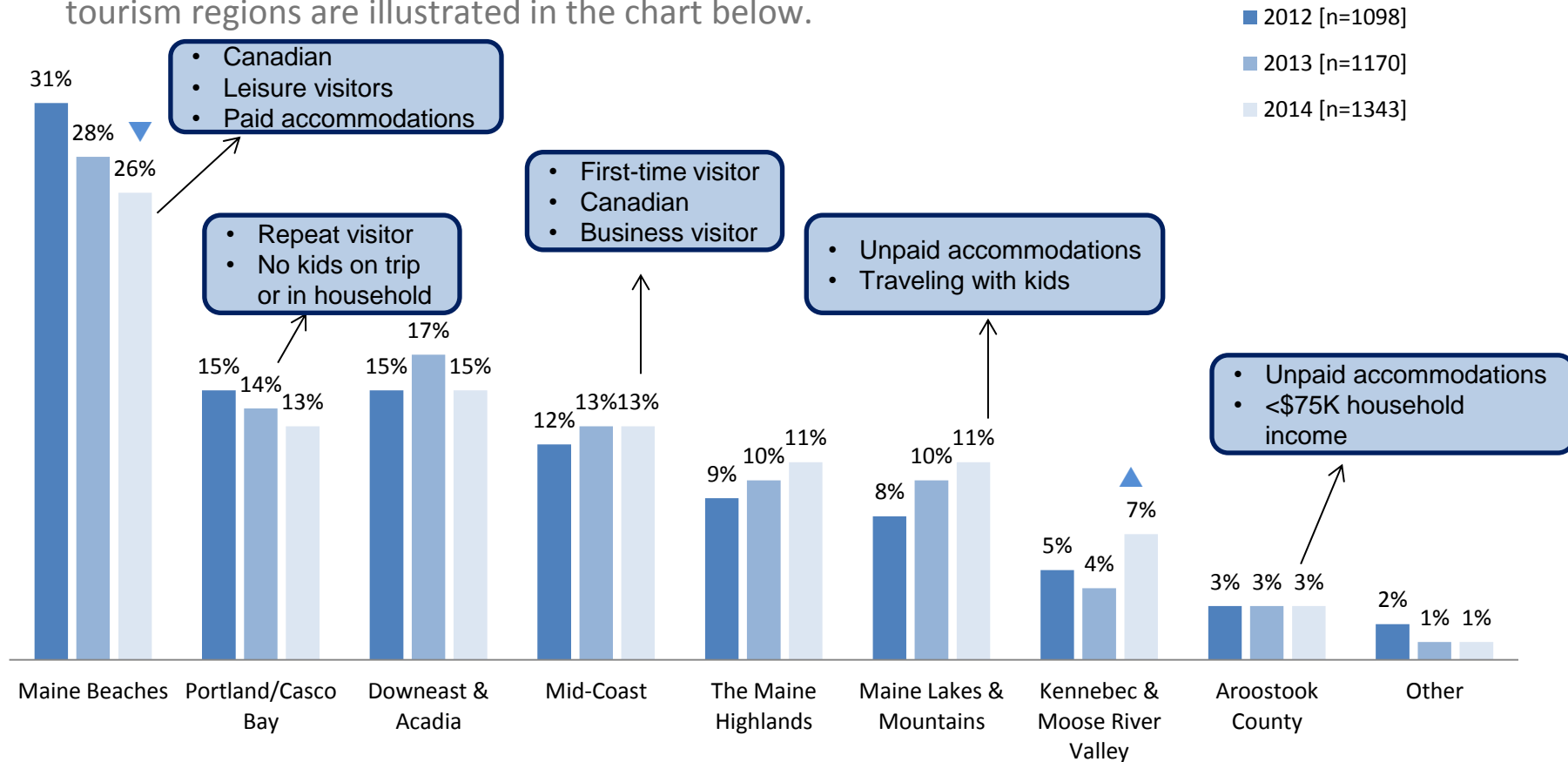
■ 2012 Overnight Visitors [n=1098]
 ■ 2013 Overnight Visitors [n=1170]
 ■ 2014 Overnight Visitors [n=1343]
 ■ 2012 Day Visitors [n=641]
 ■ 2013 Day Visitors [n=714]
 ■ 2014 Day Visitors [n=771]

Overnight Q11, Day Q10. Was this your first visit to Maine?

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

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

- The Kennebec & Moose River Valley showed an increase in the proportion of visitors to its region, while the Maine Beaches showed a slight decrease.
- The sub-groups of overnight visitors that are more likely to visit some of Maine's tourism regions are illustrated in the chart below.

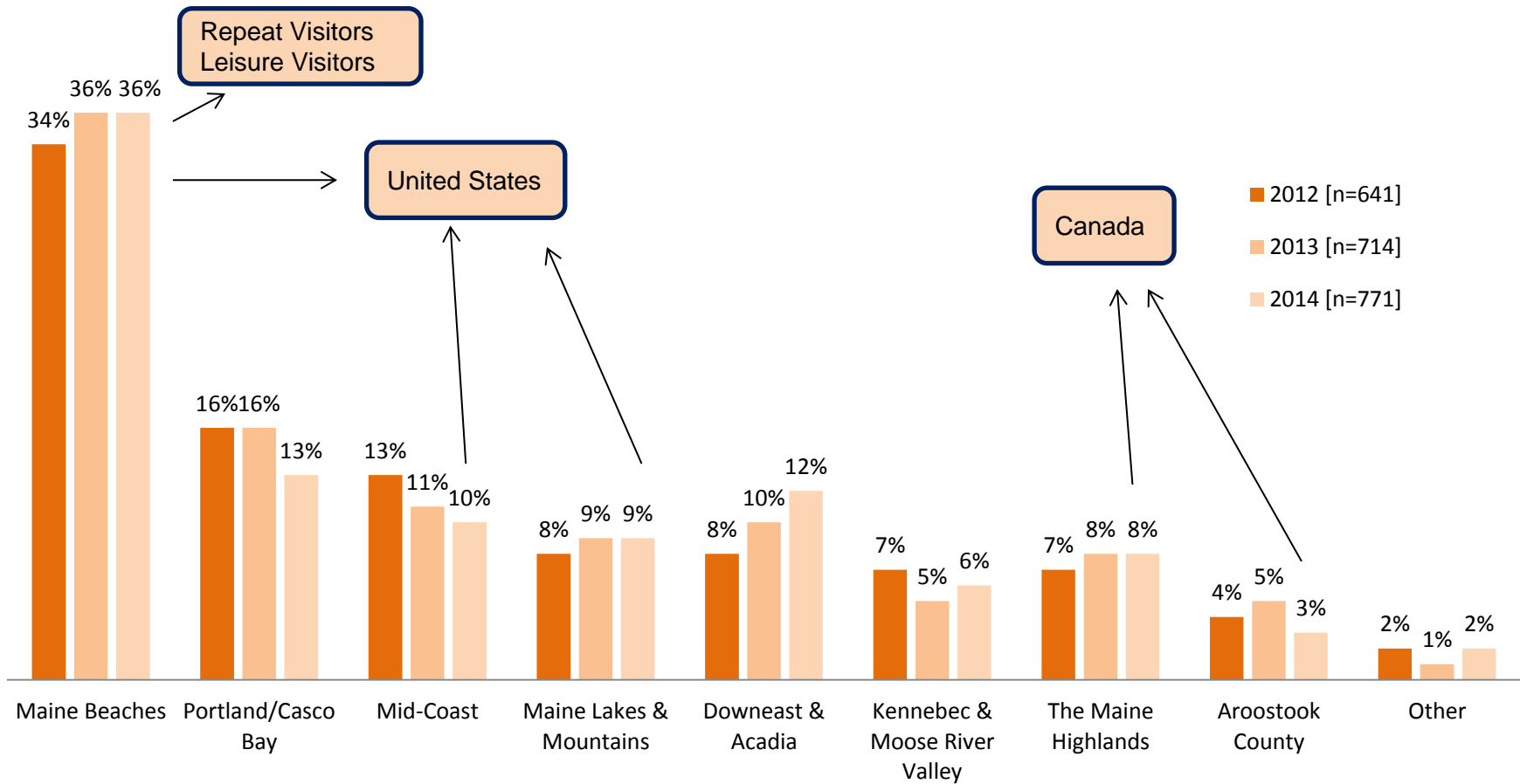


Overnight Q22. What region in Maine was your primary destination?

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

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

- The popularity of various regions differs between US residents and Canadian visitors, as shown in the chart below.



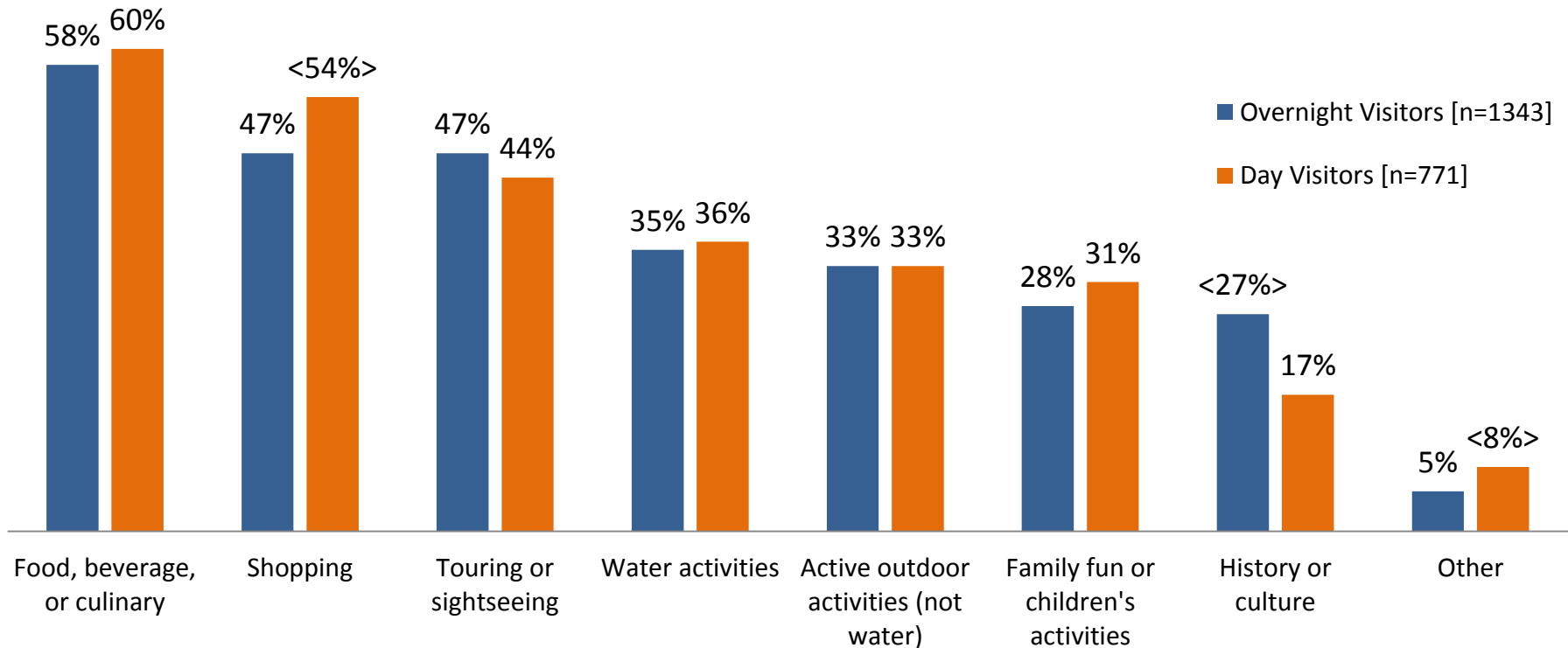
Day Q20. What region in Maine was your primary destination?

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

Most 2014 Maine summer visitors were interested in exploring Maine's various *food/beverage/culinary* options or doing some *shopping*.

- *Shopping* held more interest among day visitors, while *history/culture* was a more popular interest area among overnight visitors.

Travel Interest Areas of Maine Summer Visitors*



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

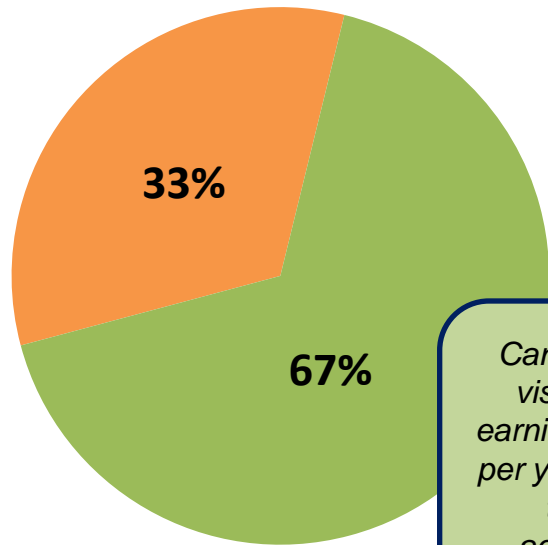
* This is a new question added in January 2014; therefore, there is no comparison to prior years.

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

Similar to past summers, two-thirds of overnight summer visitors are lodging in paid accommodations, mostly staying at hotels/motels/resorts.

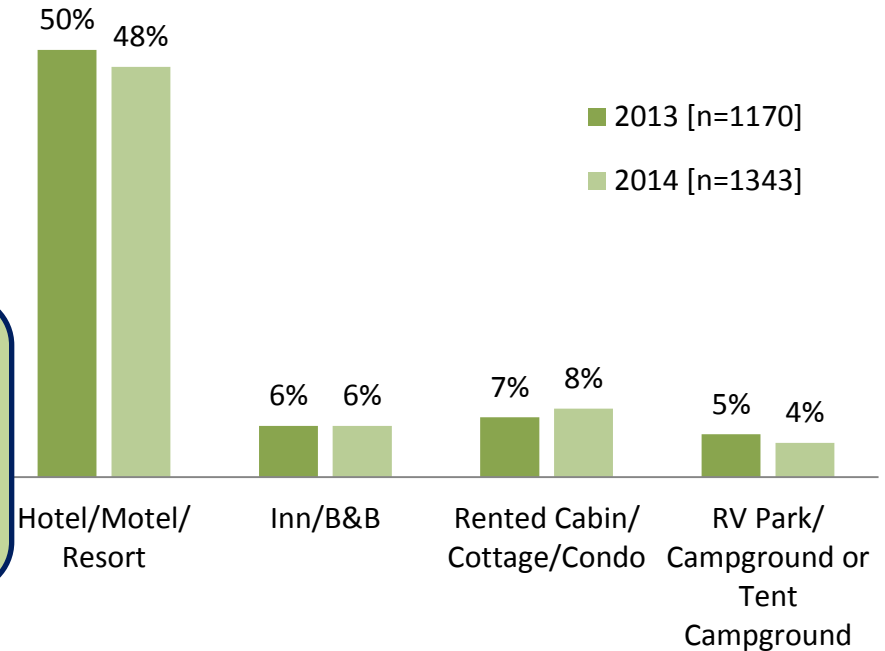
- On average, overnight visitors are staying in Maine for 3-4 nights. The average length of stay is longer for those traveling with children, those earning more than \$75k per year, and those staying in unpaid accommodations.

Type of Accommodation
[n=1343]



Canadians, first-time visitors, and those earning more than \$75k per year are more likely to stay in paid accommodations.

Type of Paid Accommodation



■ Unpaid Accommodations ■ Paid Accommodations

Average Length of Stay: 3.4 Nights

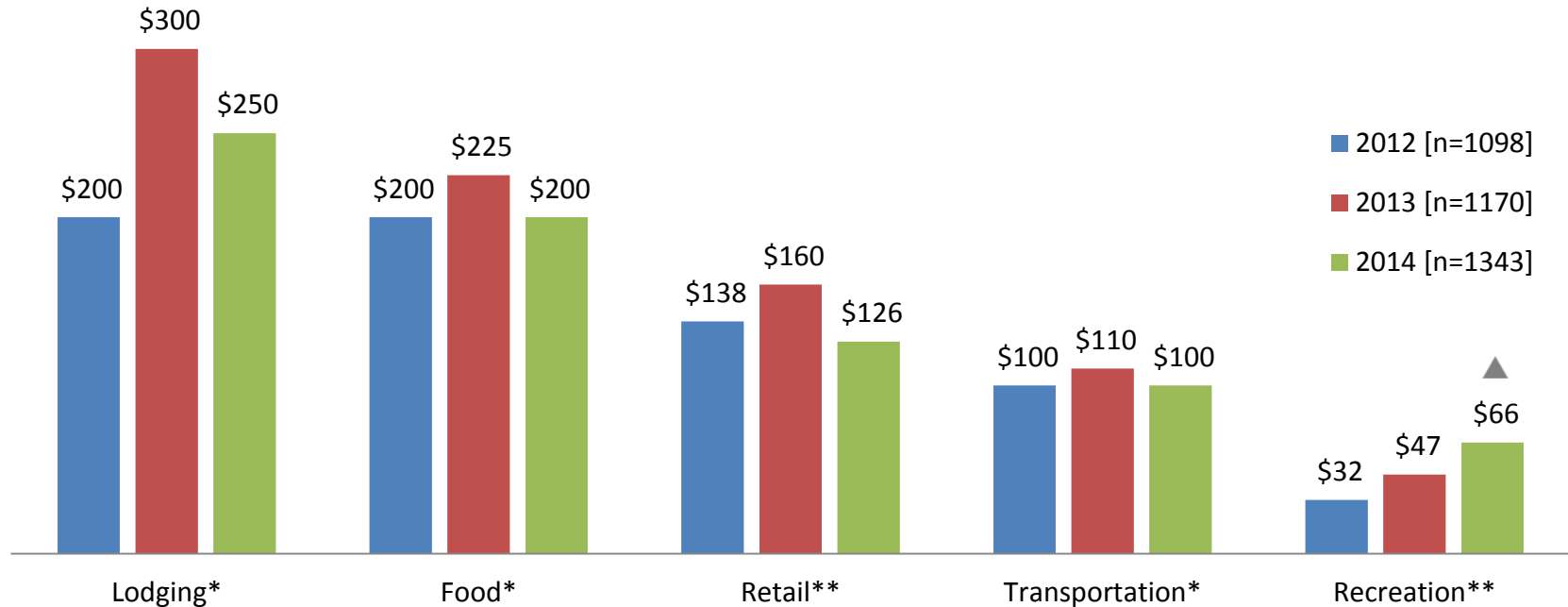
Overnight Q10. On this trip to Maine, how many nights were you away from home?

Overnight Q21. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

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

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

Average Spending per Travel Party – Overnight Visitors



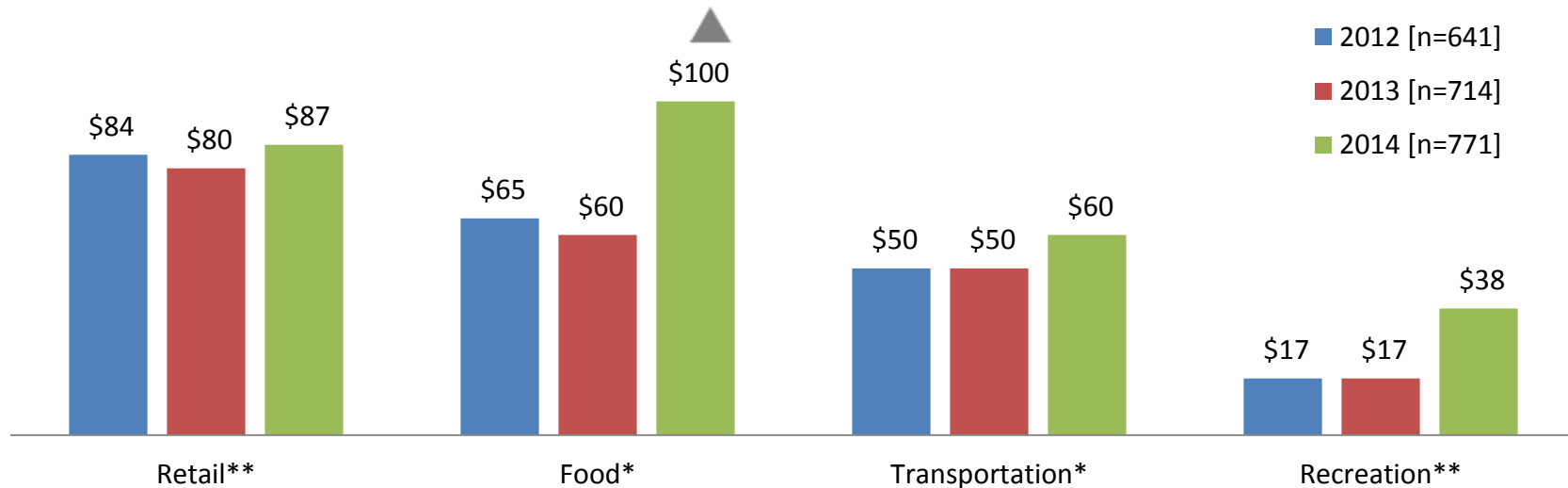
*Median Expenditures

**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.

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Day visitors spent the most on food while visiting Maine during the 2014 summer season.

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.

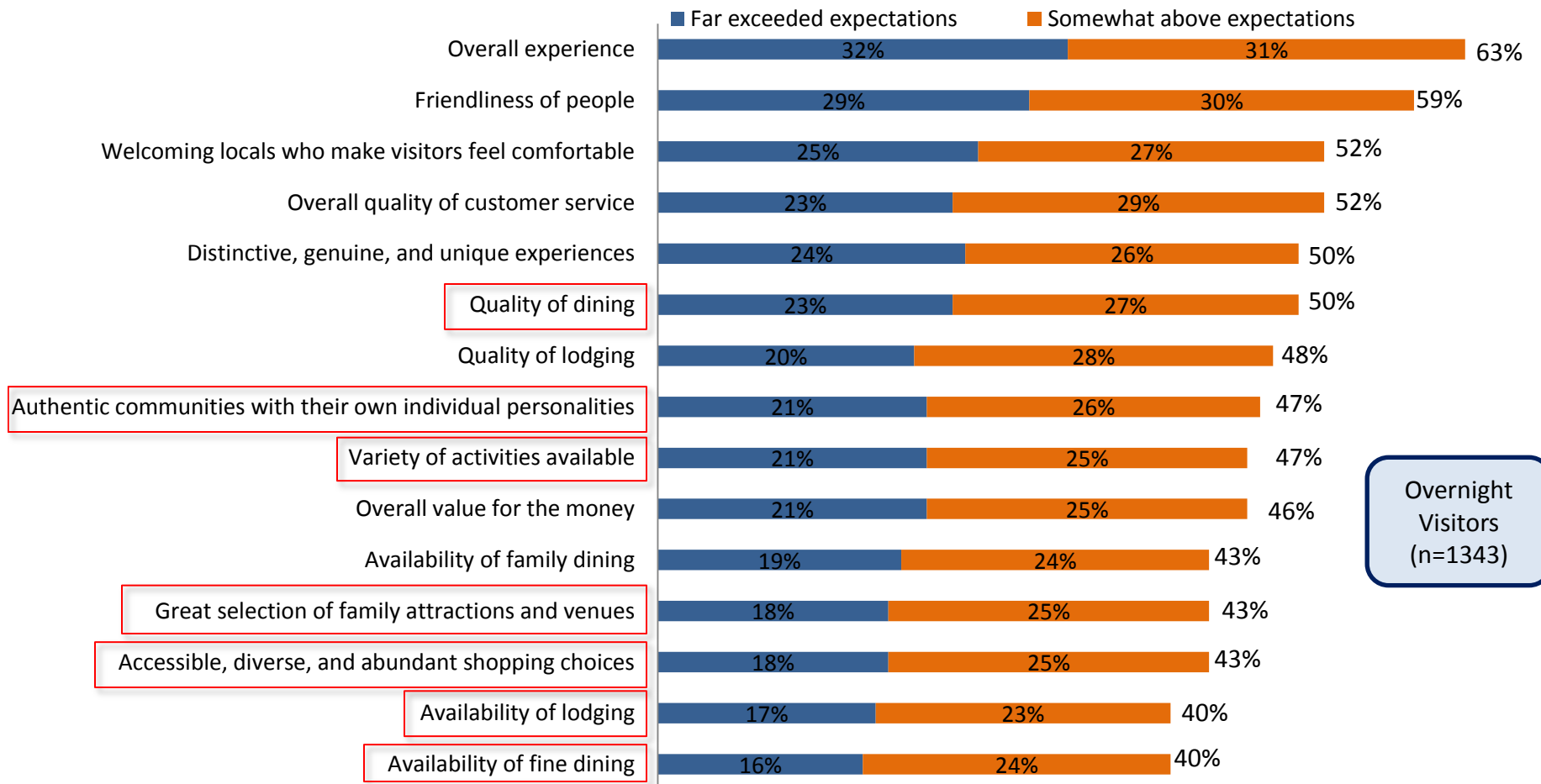
▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Trip Evaluation



Nearly two-thirds of summer overnight visitors found their overall experience visiting Maine to have exceeded 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).

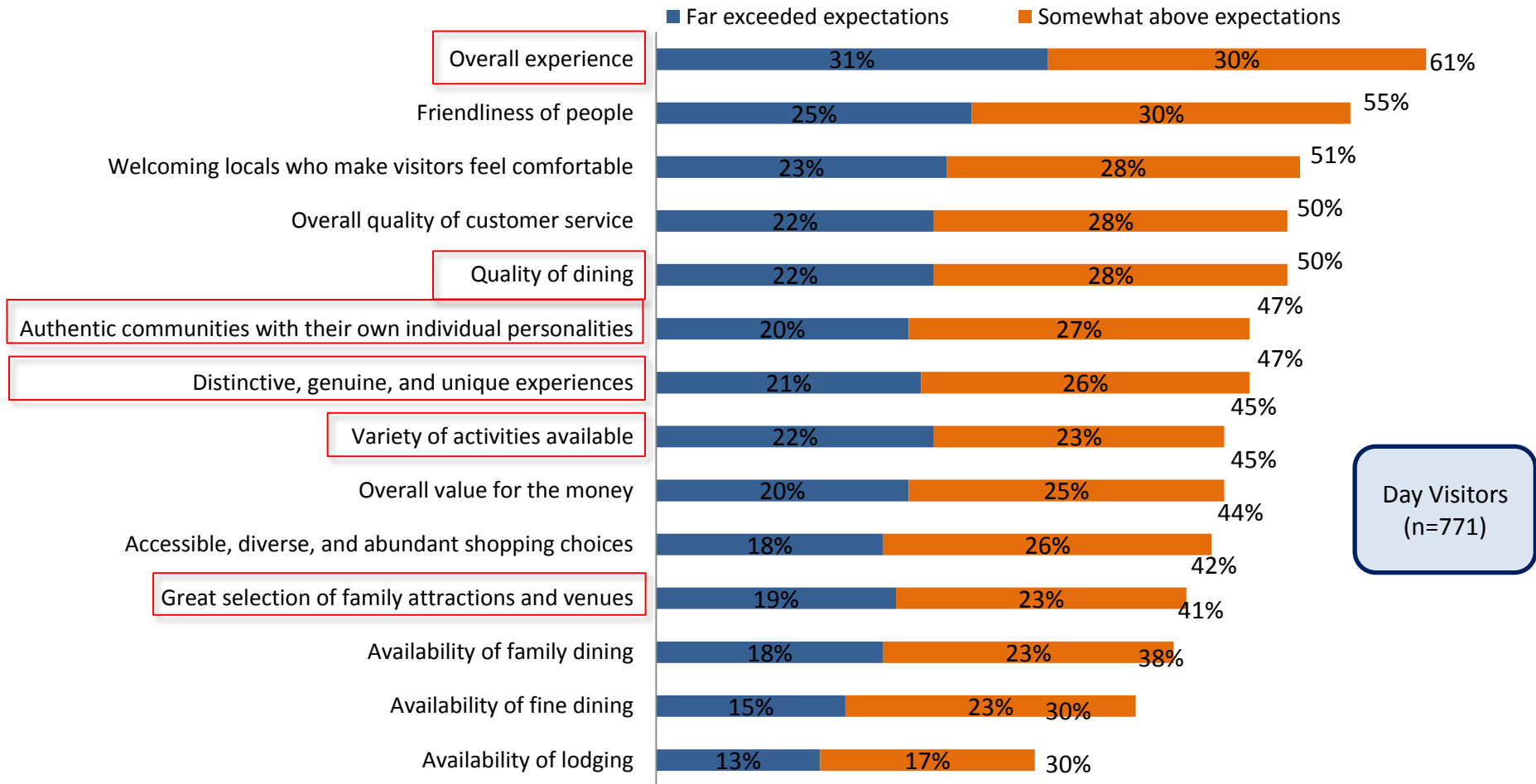


Overnight Q35: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

Similar to overnight visitors, *overall experience* and the *friendliness of people* were the items that most exceeded summer day visitors' expectations.

- US visitors are more likely to indicate that their 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.

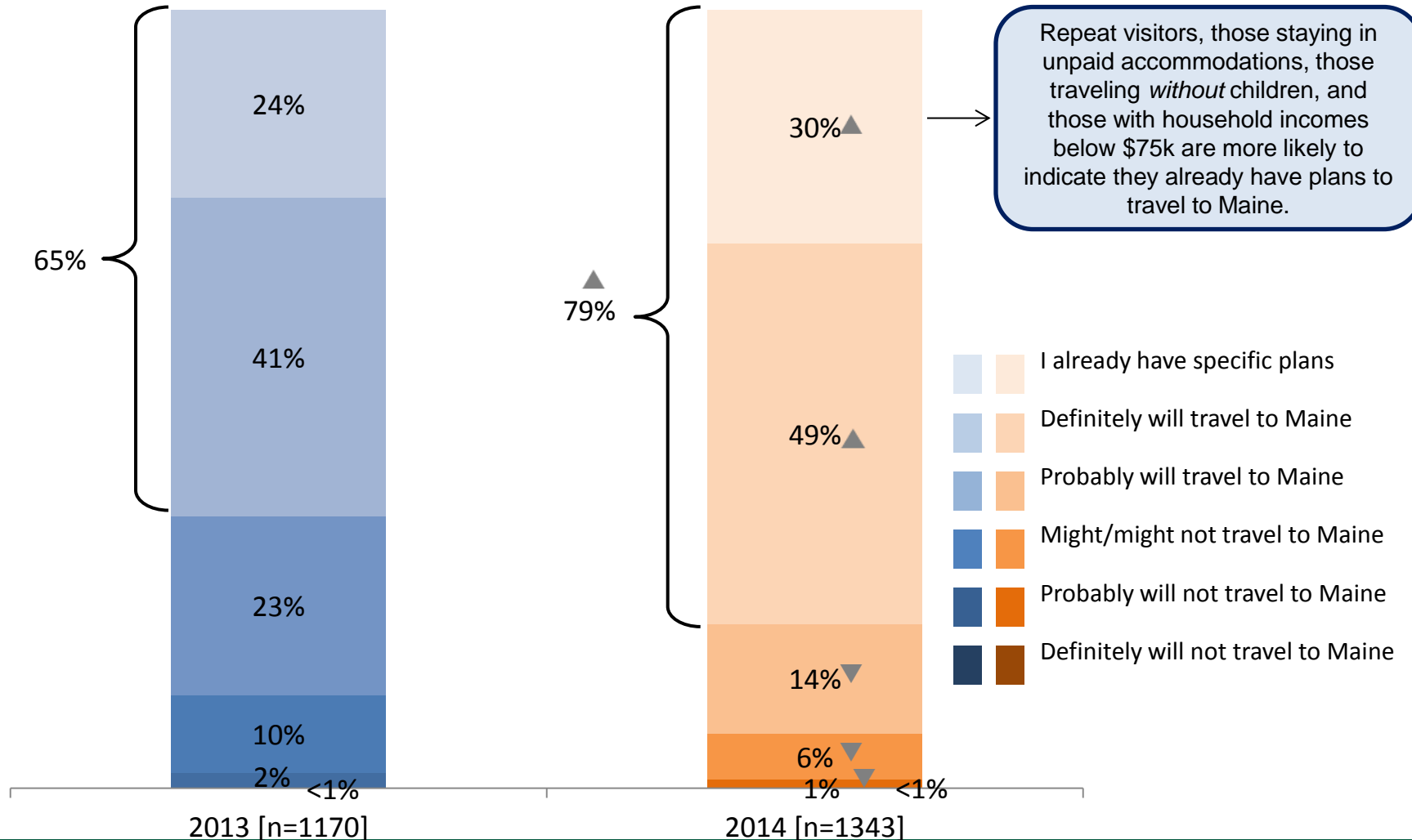
* New question added in January 2014; therefore, there is no comparison to prior years.

Future Travel



One third of Maine's overnight summer visitors already have specific plans to visit Maine again in the next two years.

Likelihood of Trip to Maine in Next Two Years

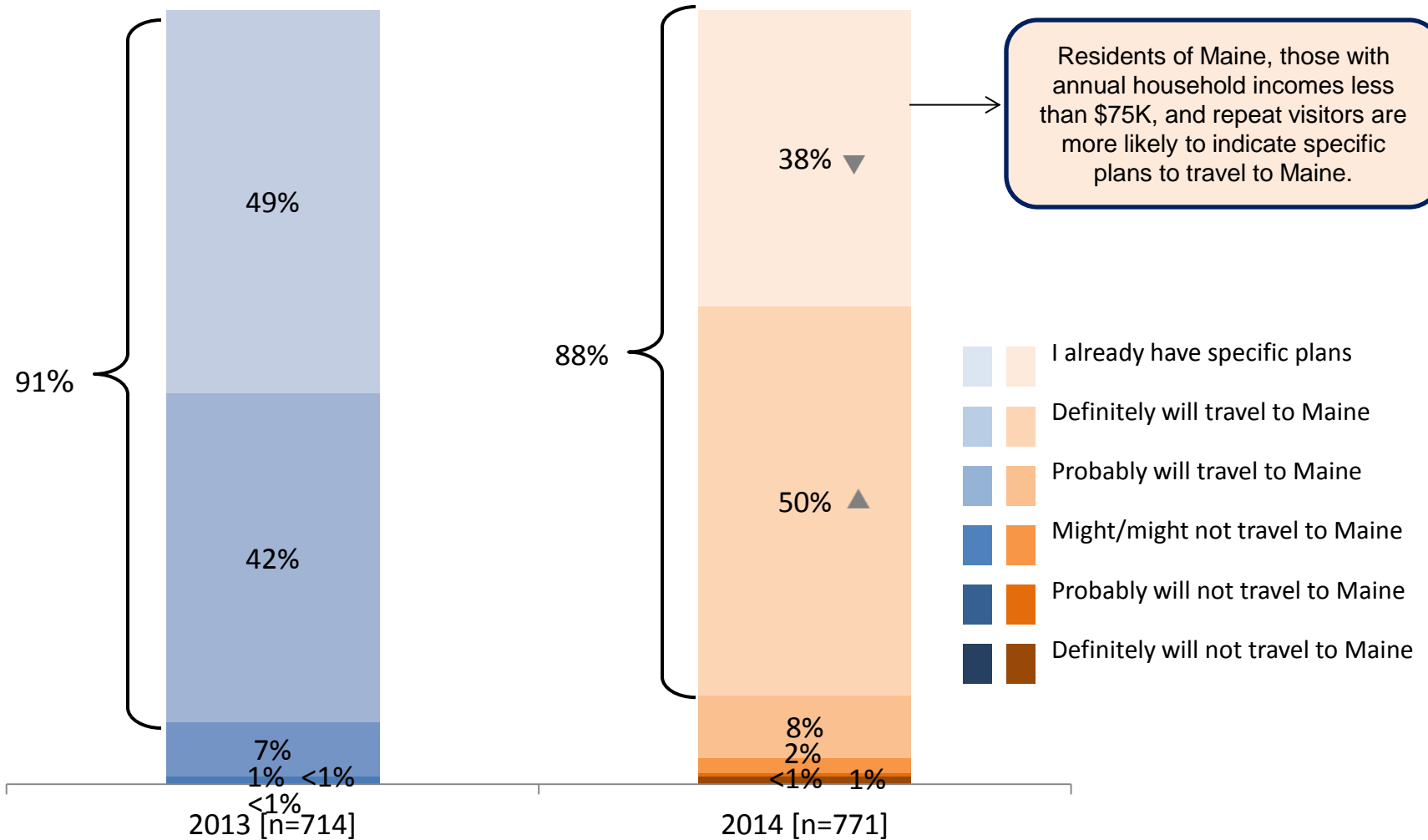


Overnight Q38. How likely will you be to travel in Maine in the next two years?

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

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

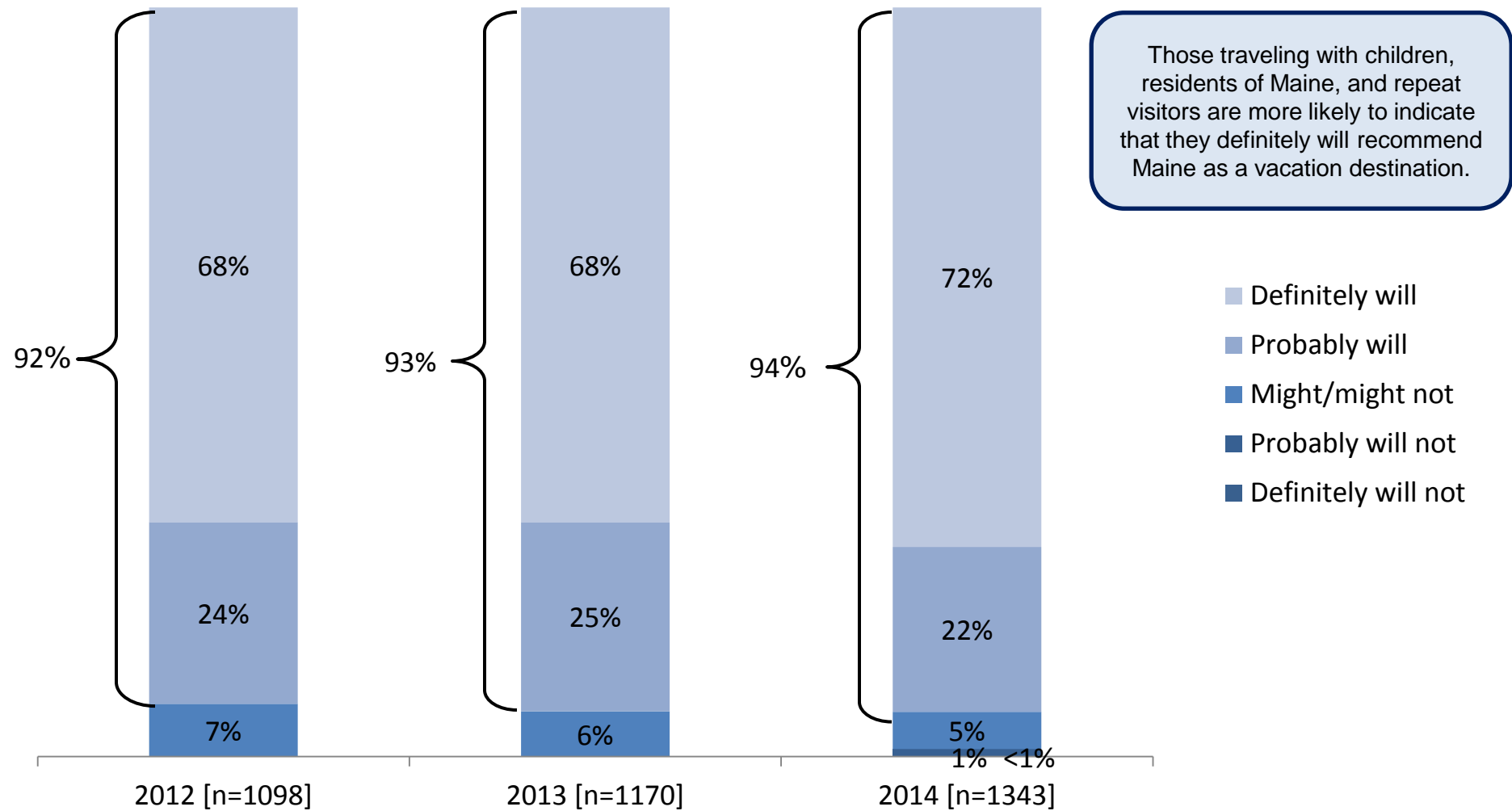
Likelihood of Trip to Maine in Next Two Years



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

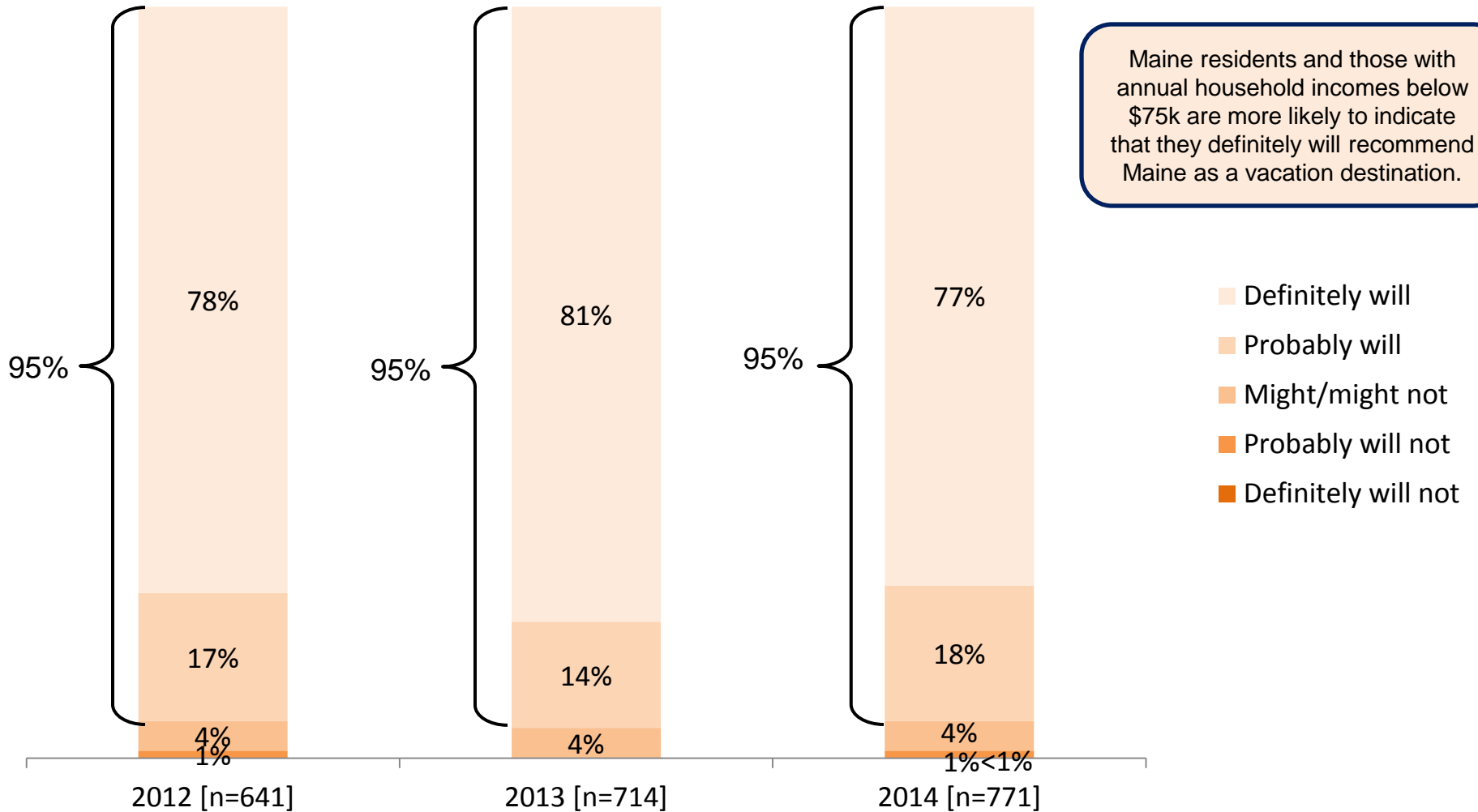
Overnight visitors overwhelmingly indicate a likelihood to recommend Maine as a vacation destination to friends/relatives.



Overnight Q39: 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

Day visitors are equally excited about their Maine vacation, with 95% indicating a likelihood to recommend Maine as a vacation destination.



Maine residents and those with annual household incomes below \$75k are more likely to indicate that they definitely will 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



DPA
201 Lafayette Center
Kennebunk, ME 04043
207.985.1790
www.digitalresearch.com