

# Maine Office of Tourism Visitor Tracking Research

## Fall 2015 Seasonal Topline

*Prepared by*



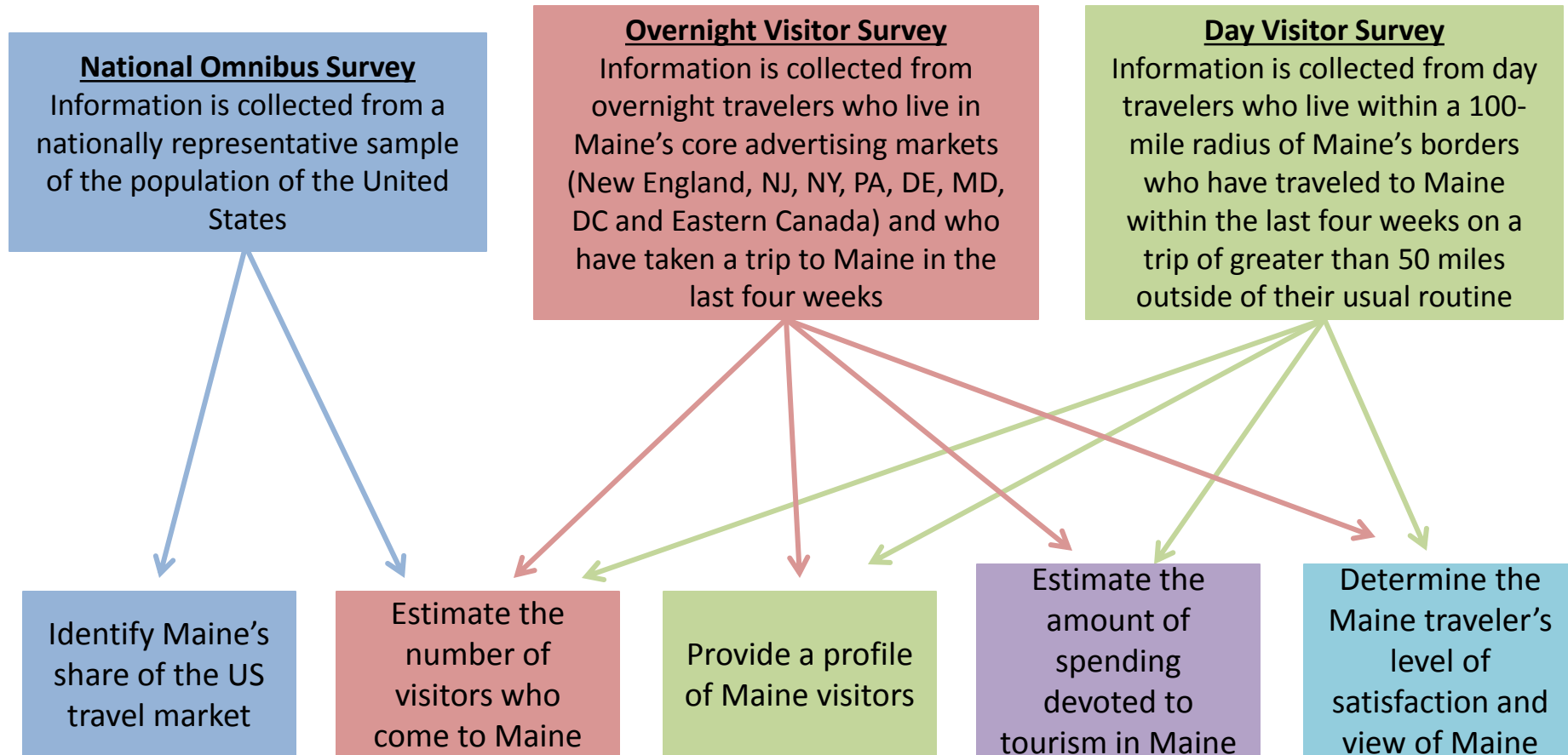
January 2016

# 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 September through November 2015. At the conclusion of the 2015 travel reporting season, adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.*

- Maine continues to exceed national travel growth trends, showing higher year-over-year growth in overnight travel. Nationwide overnight leisure and VFR travel from September to November 2015 showed a modest increase when compared with the two prior Fall seasons. Maine fared even better, showing a significant increase in tourism-related overnight and day visitation to the State (+13.3% and +12.1%, respectively). This is the second consecutive Fall season showing significant growth in overnight visitation (10.2% growth in Fall 2014), suggesting an ongoing expansion of this crucial shoulder season.
- A drop in the relative cost of travel nationwide (as indicated by the Travel Price Index), as well as the sharp decline in the cost of gasoline, likely had a positive impact on travel behaviors in Maine and throughout the nation.

# Executive Summary

- After ongoing year-over-year increases in the proportion of overnight visitors from Canada during 2012 and 2013, these gains began to decline in 2014 and continued through early 2015. Though the 2015 Summer season didn't show any change in the proportion of Canadians visiting, the Fall season illustrated another year-over-year drop in the *proportion* of overnight visitation sourcing from Canada.
- The less favorable Canadian exchange rate is certainly a potential factor in this decline. After peaking in 2012 the exchange rate has experienced a slow decline since, dropping to a Fall 2015 average seasonal rate of 0.76 (as compared to 1.01 during the same time period in 2012, 0.96 in 2013, and 0.89 in 2014). Considering Canadians' high propensity to shop and stay in paid accommodations (more so than American visitors), a declining exchange rate could negatively impact their decision to travel in Maine. Marketing aimed at this important visitor market must continue to combat the weakening Canadian dollar and convince Canadians that the trip to Maine is worth the added expense.

# Executive Summary

- For the third season in a row, the proportion of overnight visitors arriving from the Mid-Atlantic region increased this Fall over the prior Fall season (2015). This year-over-year increase in visitation from the Mid-Atlantic region was also seen in the Winter/Spring and Summer 2015 periods. Maine's increased targeting of markets further away from Maine appears to be drawing in more visitors from this region. Continued marketing to this region will be beneficial, as they are more likely than visitors from areas closer to Maine to be staying in paid accommodations, and they tend to stay in Maine longer.
- The Maine Beaches region continues to be the State's main draw during the Fall season, with 24% of overnight visitors and 33% of day visitors listing this region as their primary destination in Maine. These proportions mirror the ones seen in prior seasons, even during the summer when a beach environment would seemingly appeal to more visitors. During the Fall, the Maine Beaches region is most popular among non-resident repeat leisure visitors. The Downeast/Acadia region, Portland/Casco Bay, and the Mid-Coast follow as the next most popular regional destinations in Maine during the 2015 Fall season.

# Executive Summary

- Maine continues to receive extremely favorable evaluations from its visitors, and the most favorable evaluations continue to be in areas relating to Maine's people. *Friendliness of the people, overall quality of customer service, and welcoming locals who make visitors feel comfortable* remain among the top five rated attributes of their Maine trip for both overnight and day visitors. Clearly, Maine's people are a valuable component of the Maine vacation experience, and continued promotion of this asset is warranted.
- While overnight visitors provided higher ratings in the top three categories as compared to the prior Fall season (2014), day visitors actually provided *lower* ratings in eight of the fifteen attributes this Fall season. This is the first season where a year-over-year drop in ratings has been measured. Continued monitoring of these ratings in future seasons will help to determine whether or not this drop is indicative of concerns in these areas or merely a temporary shift in attitudes.



# Executive Summary

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- *Food/beverage/culinary activities, shopping, and touring/sightseeing* remain the top interest areas among both overnight and day visitors (with *shopping* coming in second for day visitors and *touring/sightseeing* coming in second for overnight visitors). These stated interests are further supported by reported expenditures, with overnight visitors spending the highest proportion of money in the lodging and food categories, and day visitors spending the highest proportion on food and retail goods.

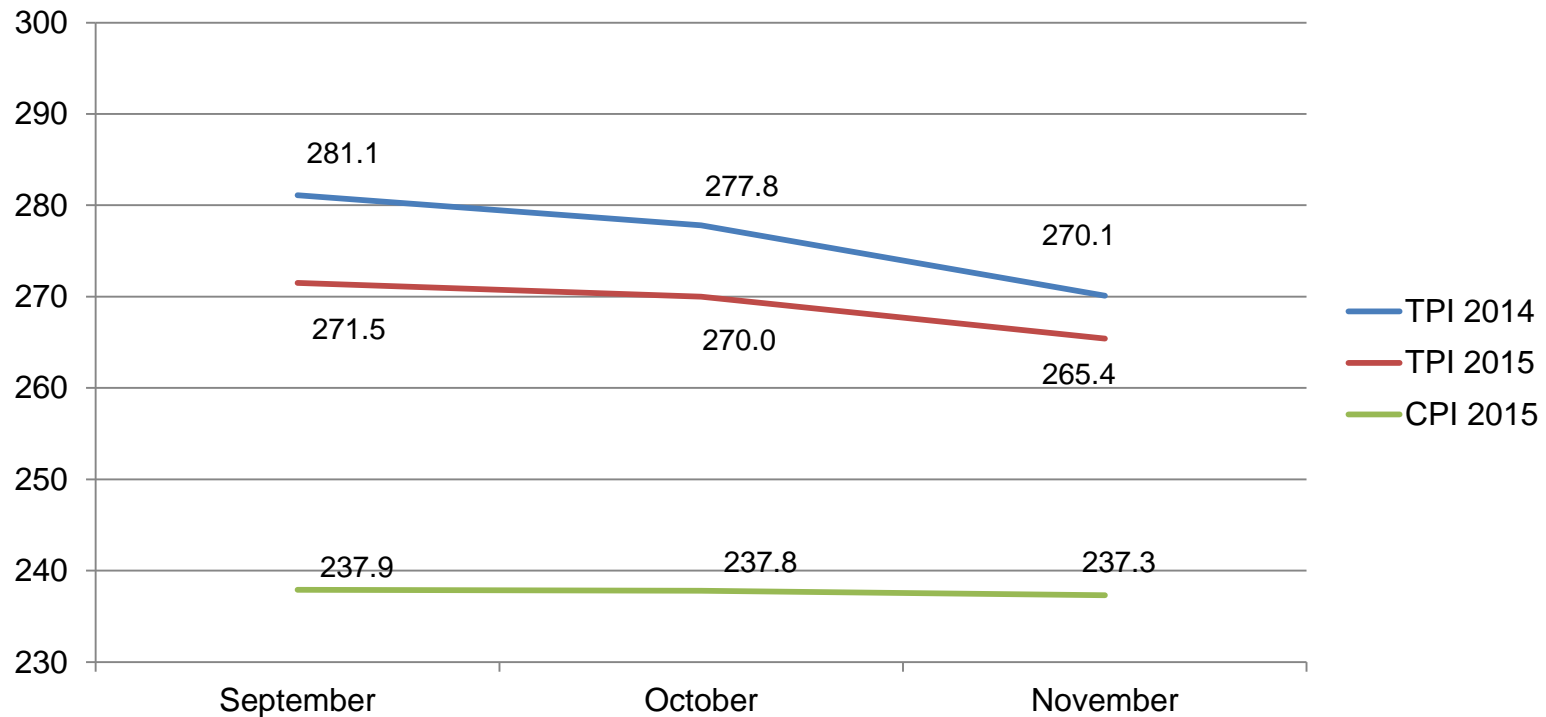
# 2015 Fall Season Travel Context



## Travel Price Index continues to exceed the Consumer Price Index, indicating the high cost of travel relative to other goods.

- However, the Fall 2015 TPI Index (averaging 269) came in lower than the Fall 2014 Index (averaging 276), while the Consumer Price Index showed relatively no change. This same pattern was illustrated during the Summer season and may signal a potential drop in the relative cost of travel as compared to other goods.

### Consumer Price Index and Travel Price Index

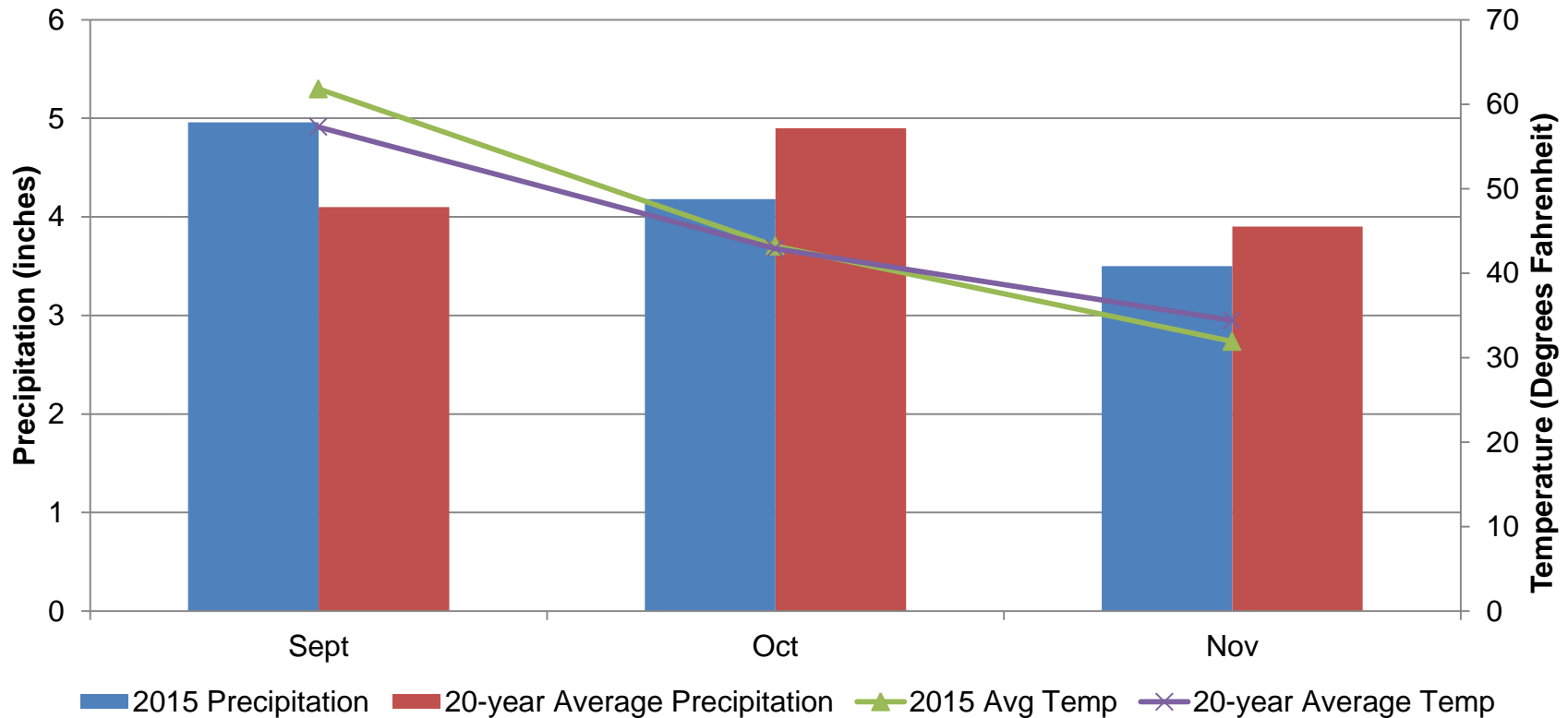


Data Sources: CPI figures are from the US Bureau of Labor Statistics. TPI figures are from the US Travel Association.

# Maine's Fall temperatures were just about on par with historical averages, while precipitation differed somewhat.

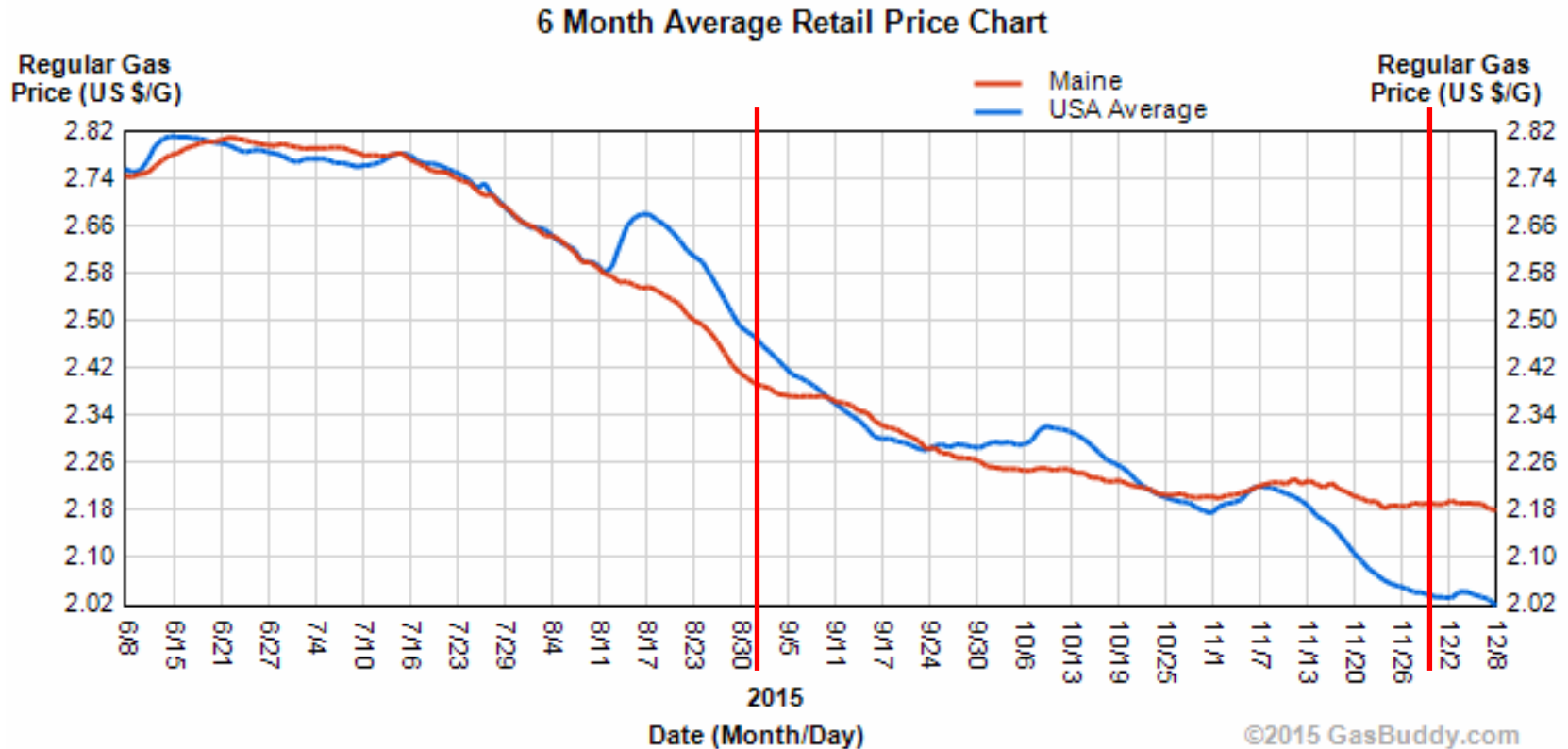
- Though October and November showed below average amounts of precipitation, September was above average.

## Precipitation and Temperature – Maine Fall 2015



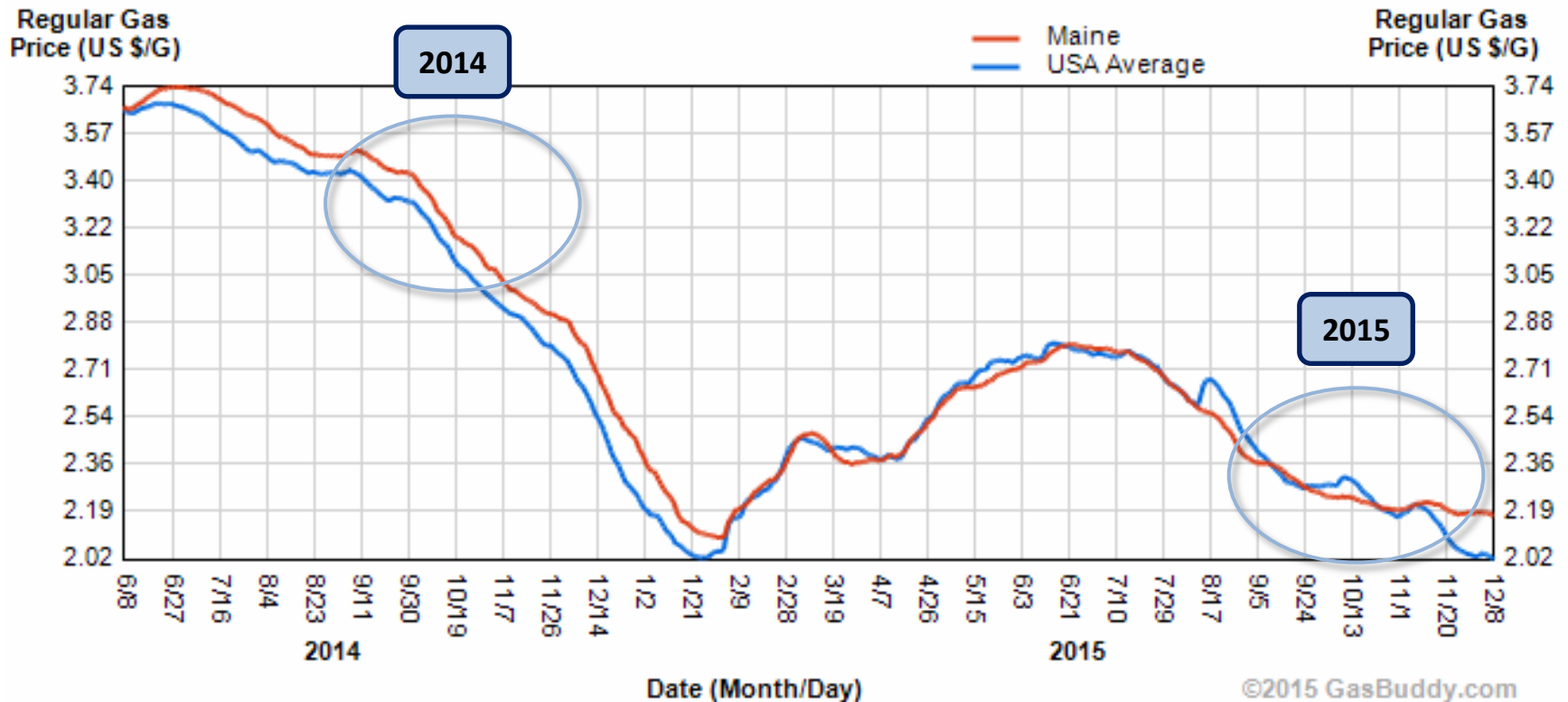
# Maine gas prices began the Fall season below US average prices, but surpassed the declining US average prices by the end of November.

- Maine gas prices did not follow the declining US gas prices in November. Gas prices in Maine remained between \$2.15 and \$2.25 per gallon during the last month of this Fall season.



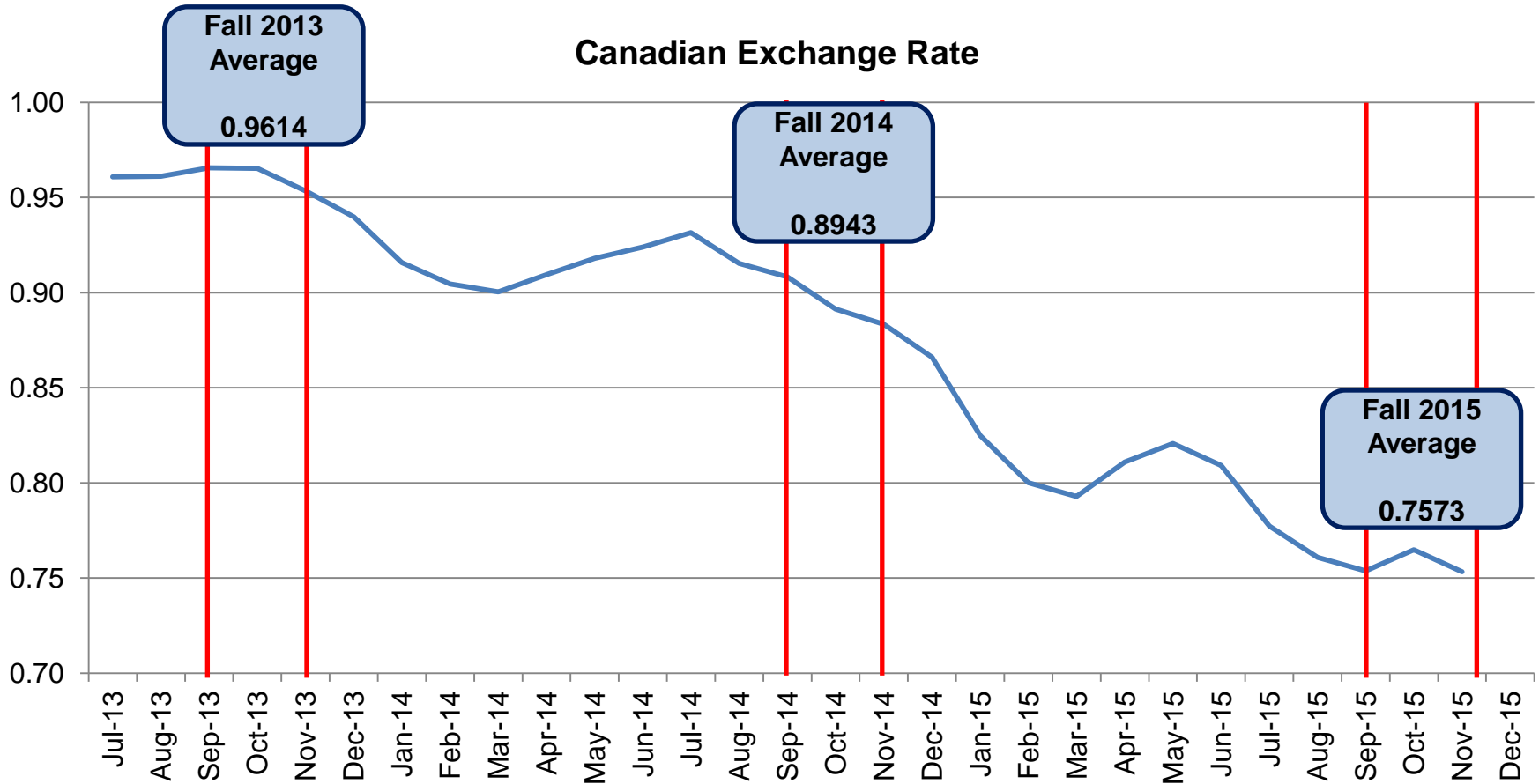
Compared to the prior Fall season (2014) gas prices nationwide and in Maine were significantly lower this Fall (2015).

18 Month Average Retail Price Chart



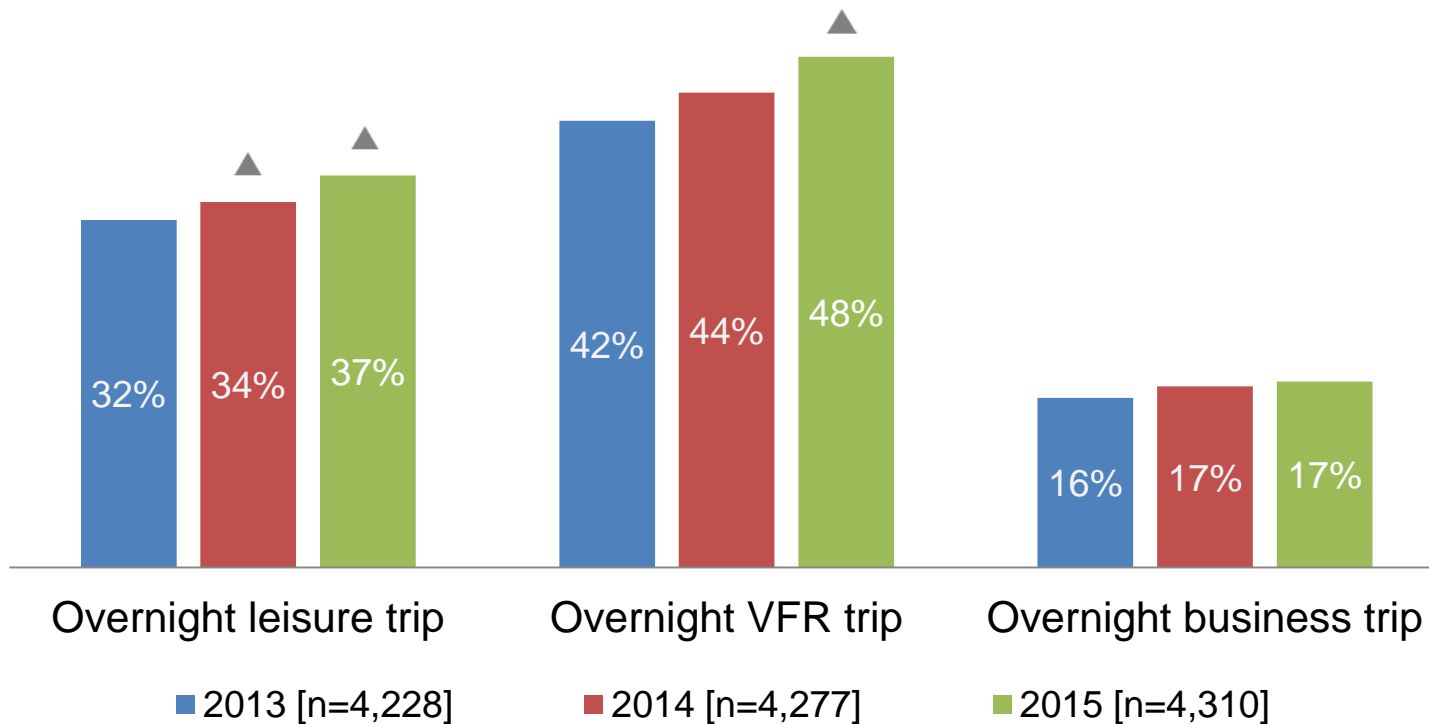
©2015 GasBuddy.com

The Canadian exchange rate continued the decline that began during the early months of 2013, dropping to a 2015 Fall season rate of 0.76.



# There was a slight year-over-year increase in leisure and VFR travel nationwide, coupled with stable travel rates for business travelers.

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



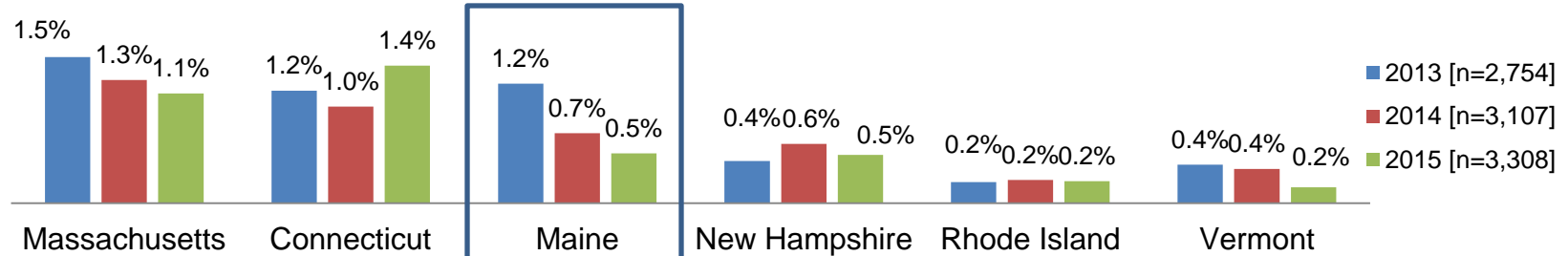
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

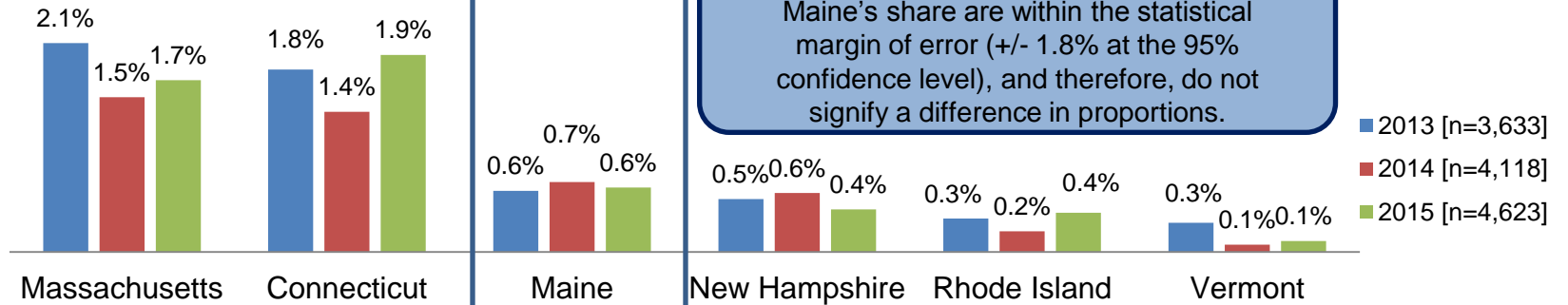


# Maine continues to hold on to about 1% of the national overnight leisure travel market.

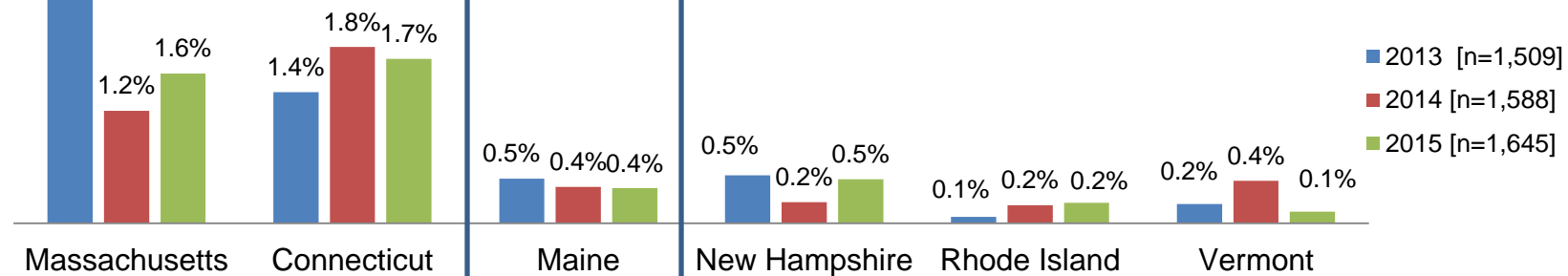
## Overnight Leisure Trips



## 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 2014 and 2015 at the 95% confidence level

# 2015 Fall Season Highlights



# The Fall 2015 season showed significant year-over-year growth, with estimated overall visitation to Maine increasing nearly 13%.

*Note: Visitation estimates provided here are preliminary and reflect visitation from September through November 2015. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.*

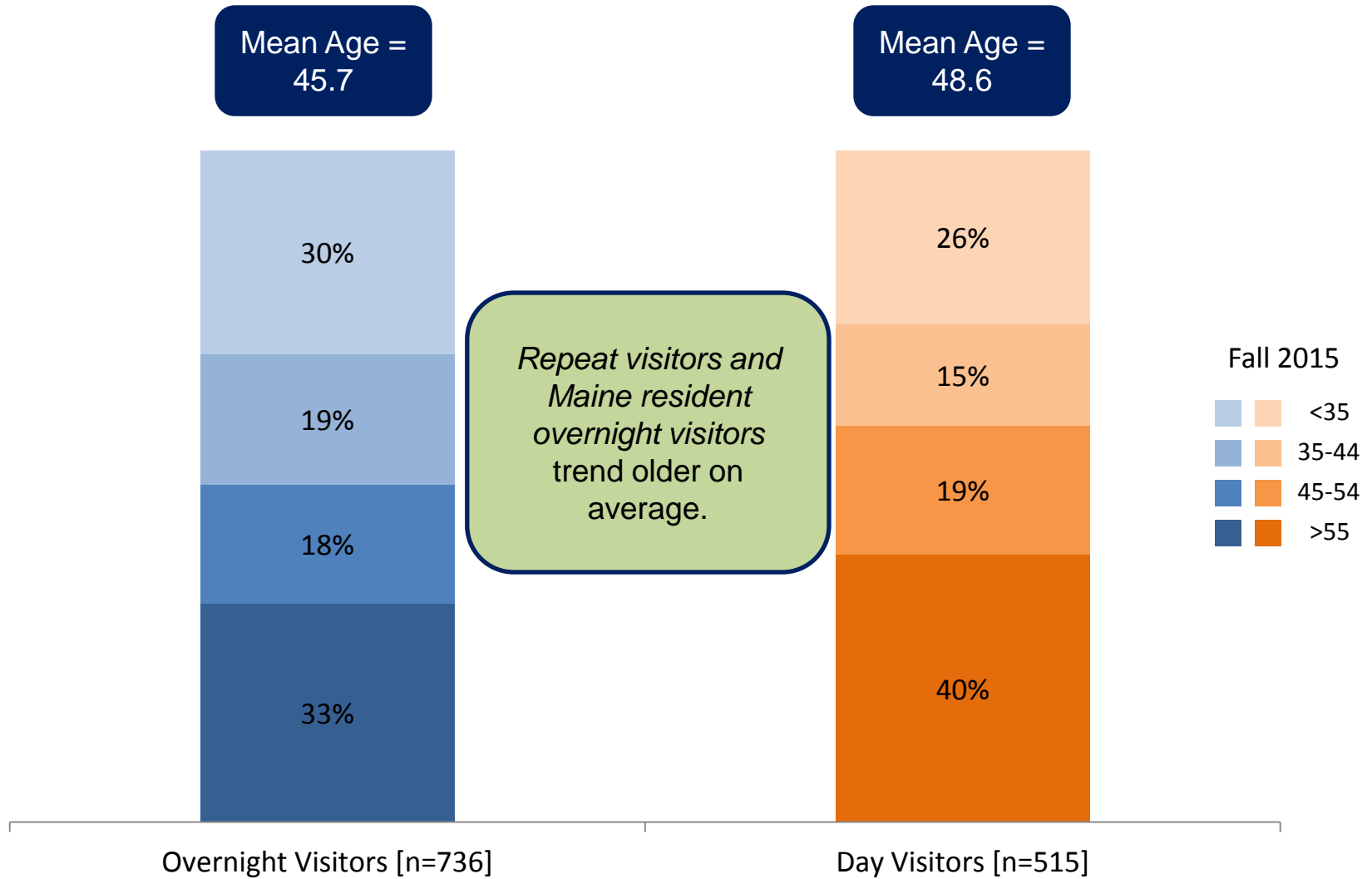
Visitation Estimates*	Fall 2014	Fall 2015	% Chg
<b>Total Estimated Visitation</b>	<b>8,671,836</b>	<b>9,782,253</b>	<b>+ 12.8%</b>
<i>Overnight Visitors</i>	<i>5,192,308</i>	<i>5,881,374</i>	<i>+ 13.3%</i>
<i>Day Visitors</i>	<i>3,479,528</i>	<i>3,900,879</i>	<i>+ 12.1%</i>

*\*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.*

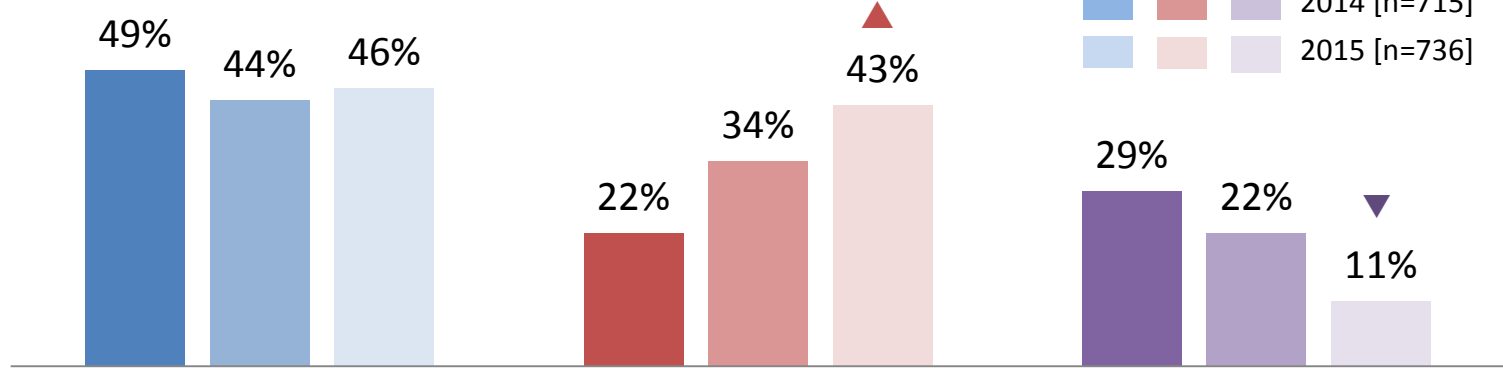
# As seen in previous seasons, Fall visitors to Maine average in their mid-40s, with more than half over the age of 45.



# Fall 2015 showed a drop in the proportion of overnight visitors from Canada, following year-over-year drops seen in other seasons of 2014 and 2015.

### Visitor Origin of Maine Overnight Visitors

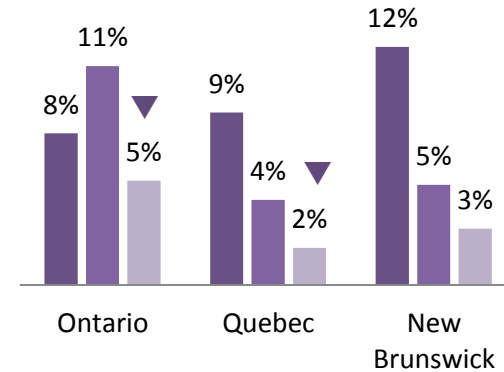
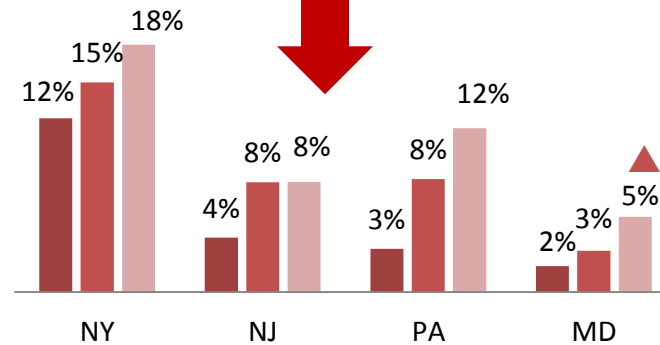
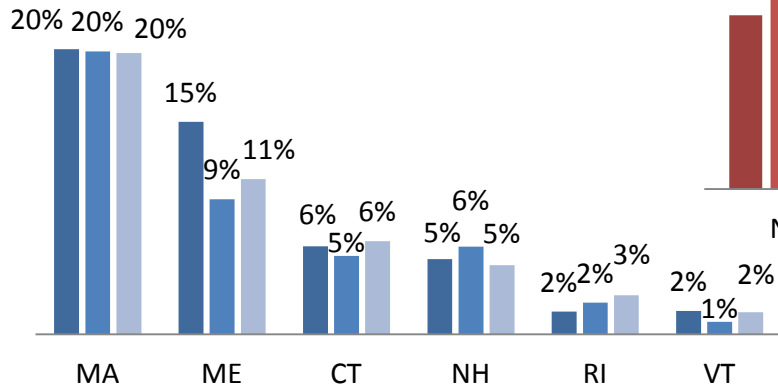
■ 2013 [n=681]  
■ 2014 [n=715]  
■ 2015 [n=736]



US - New England

US - Mid Atlantic

Canada



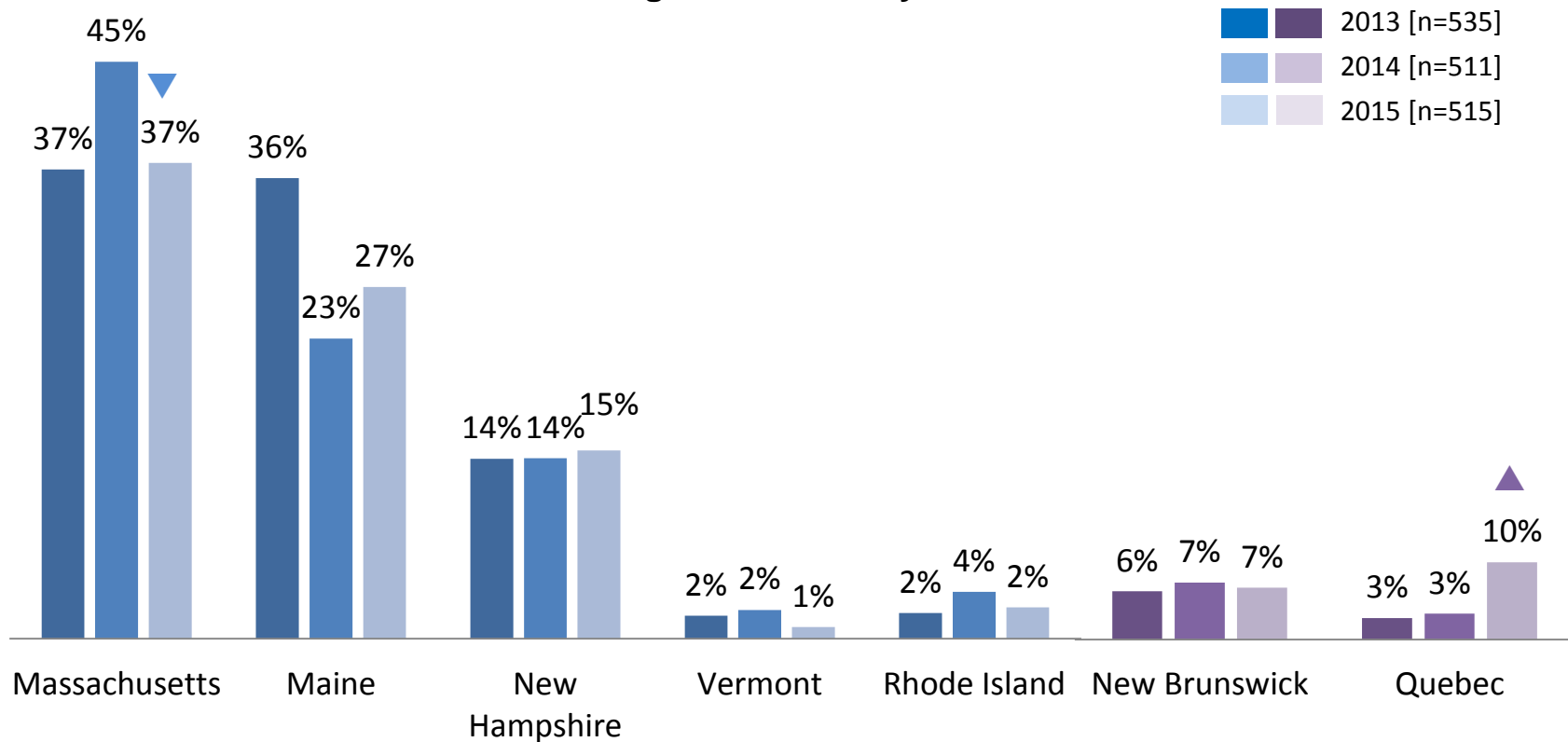
State/Province of Residence

▲ ▼ notes significant difference between 2014 and 2015 at the 95% confidence level

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

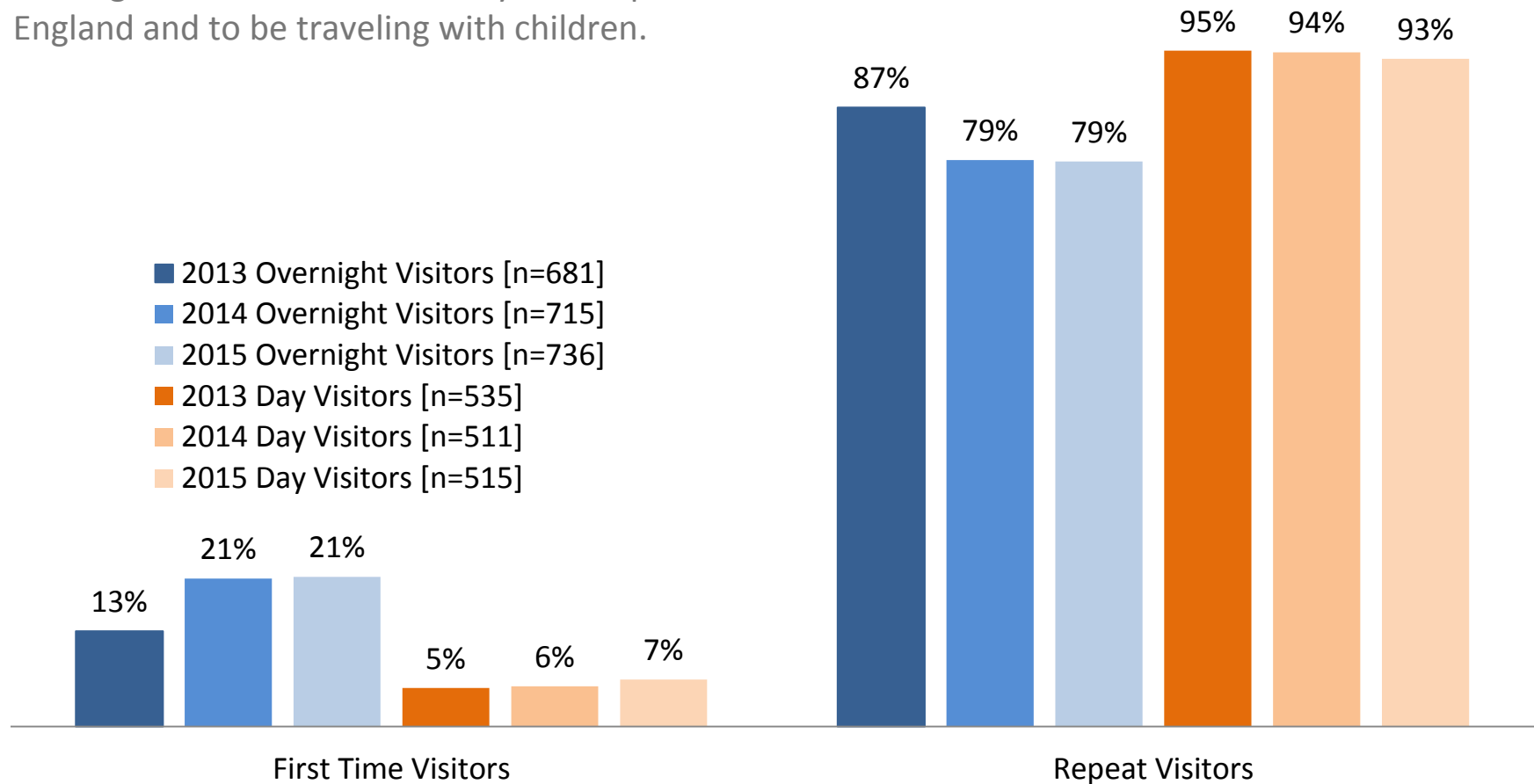
- Massachusetts provided a smaller proportion of day visitors to Maine when compared to last year, while Quebec provided a larger proportion of day visitors.

## Visitor Origin of Maine Day Visitors



# The 2015 Fall season showed a stable proportion of first-time visitors when compared to the previous Fall season.

- This follows consistent increases in the proportion of first-time overnight visitors during all of 2014 and the Winter/Spring season of 2015.
- First-time overnight and day visitors tend to be younger than repeat visitors. First-time overnight visitors are more likely than repeat visitors to be from outside of New England and to be traveling with children.



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

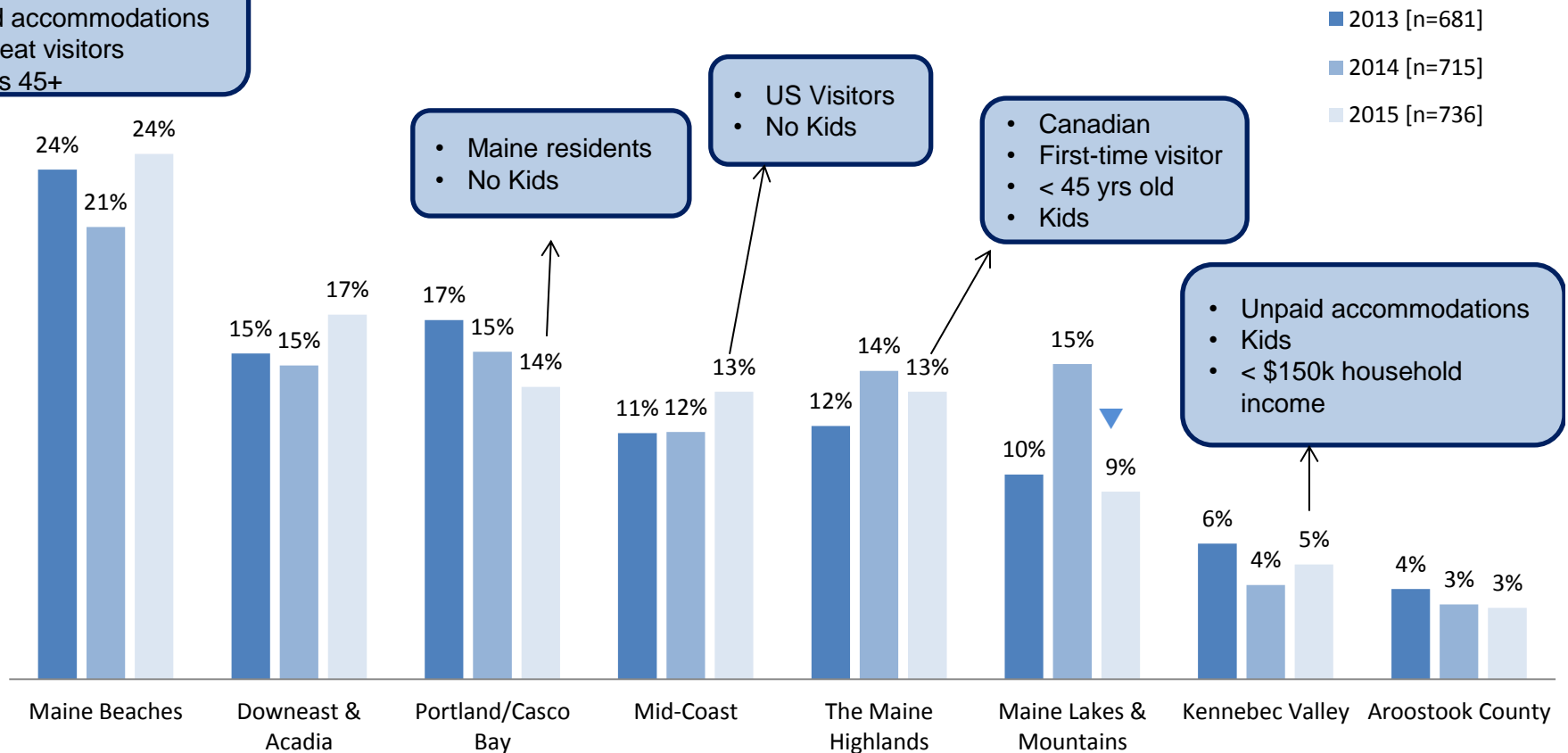
▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

# One-fourth of Maine's overnight visitors during the 2015 Fall season say the Maine Beaches region was their primary destination.

- The Maine Lakes & Mountains region showed a decrease in the proportion of visitors to its region, following an increase that was seen between the 2013 and 2014 Fall seasons.
- The sub-groups of overnight visitors that are more likely to visit some of Maine's tourism regions are illustrated in the chart below.

- Non-residents
- Leisure visitors
- Paid accommodations
- Repeat visitors
- Ages 45+

## Primary Destination of Maine Overnight Visitors



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

▲ ▼ notes significant difference between 2014 and 2015 at the 95% confidence level



# Same as overnight visitors, Fall day visitors are most likely to be visiting the Maine Beaches region.

- The Mid-Coast region showed an increase in the proportion of day visitors this Fall.
- The popularity of various regions differs between different sub-groups, as shown in the chart below.

• Leisure/VFR visitors  
• September visitors

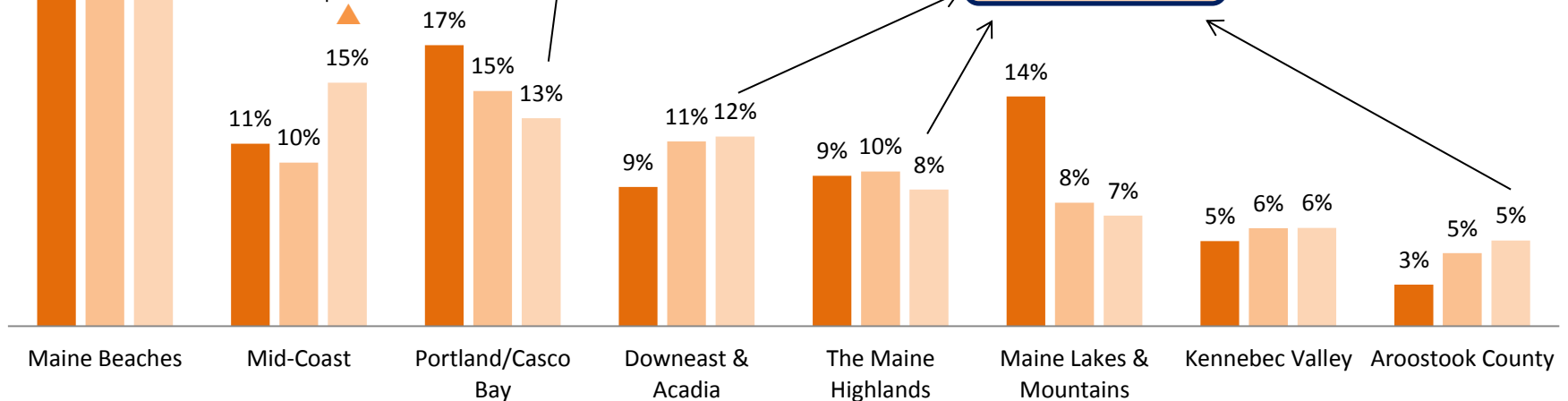
## Primary Destination of Maine Day Visitors

• Business travelers  
• US visitors

• Repeat visitors  
• US visitors

Canadian visitors

■ 2013 [n=535]  
■ 2014 [n=511]  
■ 2015 [n=515]



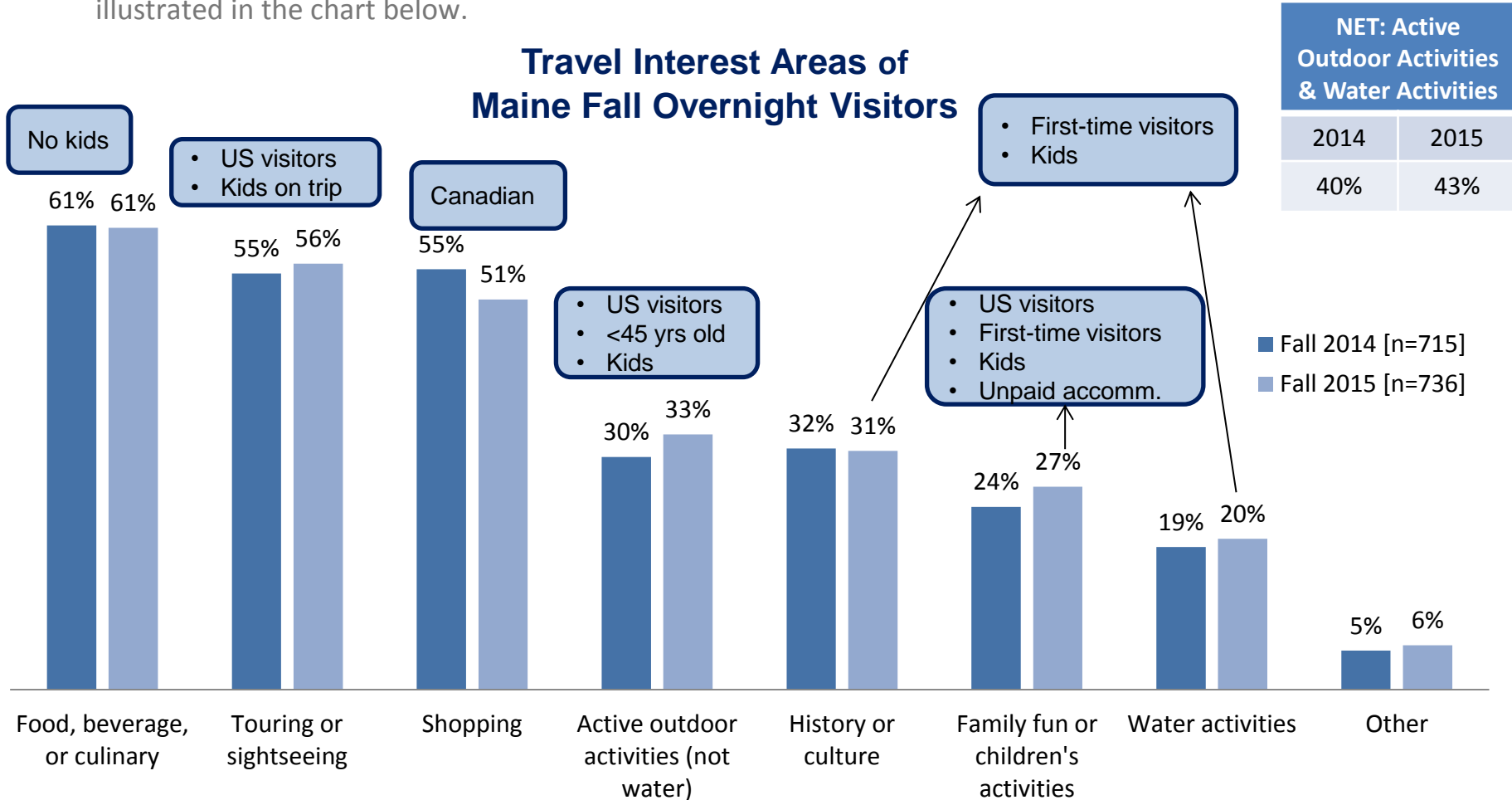
Day Q20. What region in Maine was your primary destination?

▲ ▼ notes significant difference between 2014 and 2015 at the 95% confidence level

# Most 2015 Fall overnight visitors were interested in exploring Maine's various *food/beverage/culinary* options or doing some *touring/sightseeing*.

- Shopping was also a popular interest area desired by Maine's Fall season overnight visitors.
- The sub-groups of overnight visitors that are more likely to express interest in certain areas are illustrated in the chart below.

## Travel Interest Areas of Maine Fall Overnight Visitors



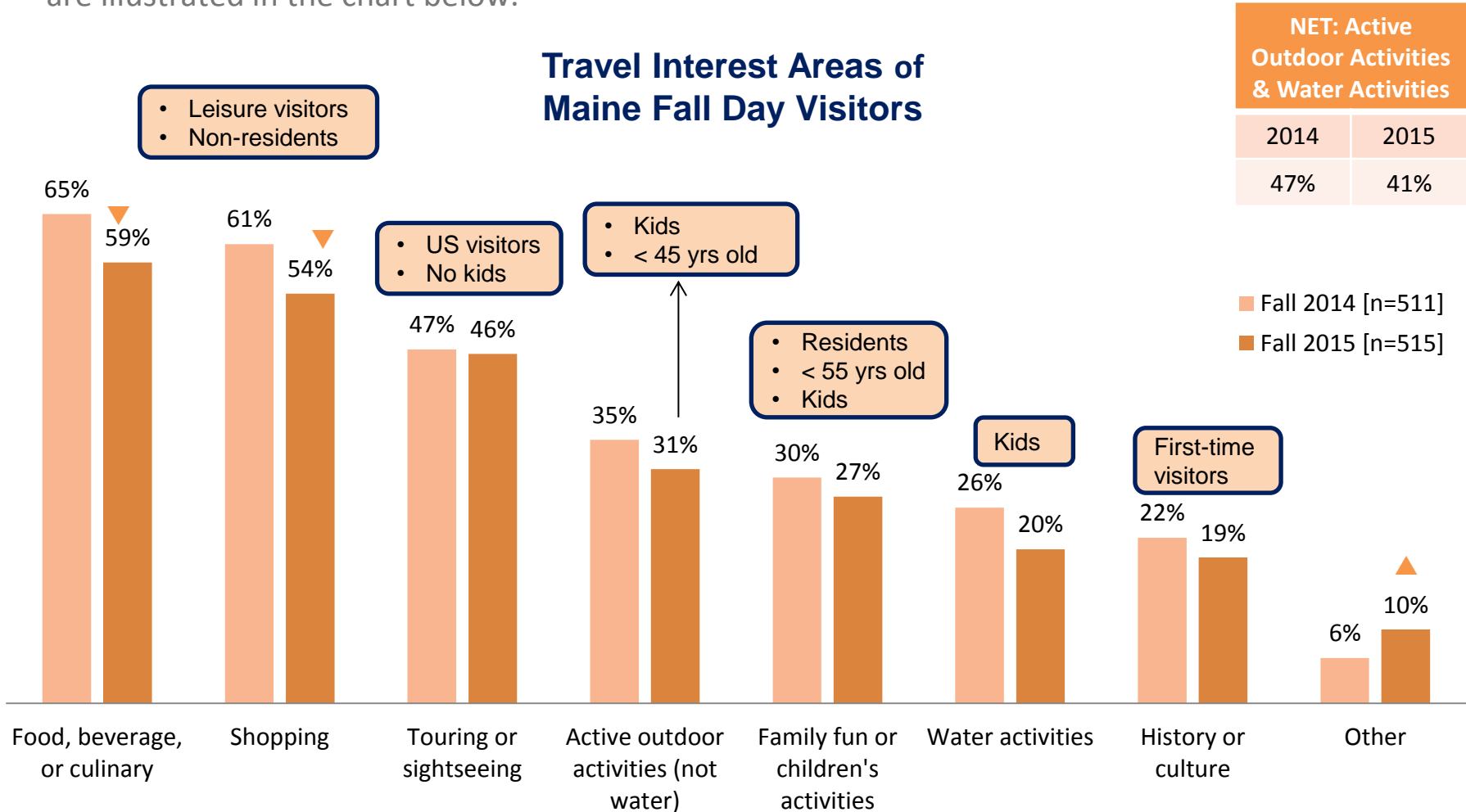
Overnight Q29: Which of the following interest areas did you want to pursue during this trip to Maine?

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

# Food/beverage/culinary and shopping interests were the most popular among Fall 2015 day visitors.

- The sub-groups of day visitors that are more likely to express interest in certain areas are illustrated in the chart below.

## Travel Interest Areas of Maine Fall Day Visitors



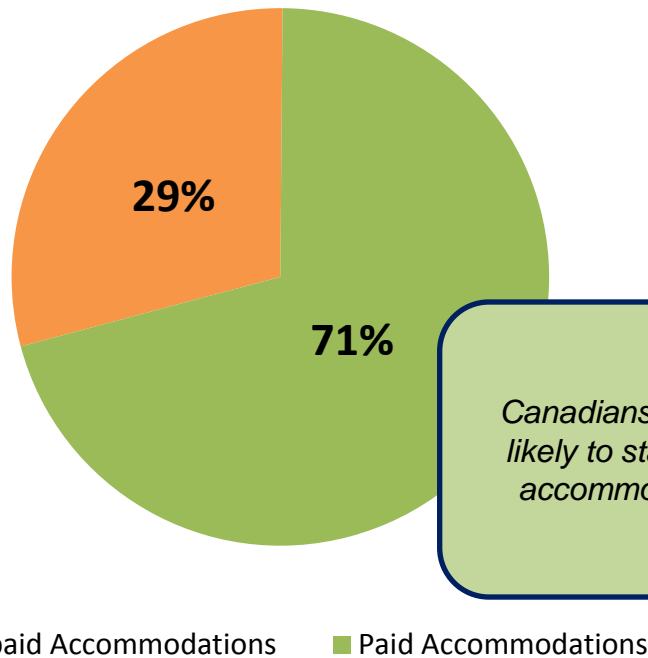
Day Q17: Which of the following interest areas did you want to pursue during this trip to Maine?

▲ ▼ notes significant difference between 2014 and 2015 at the 95% confidence level

# Nearly three-fourths of overnight Fall visitors stayed in paid accommodations, mostly hotels/motels/resorts.

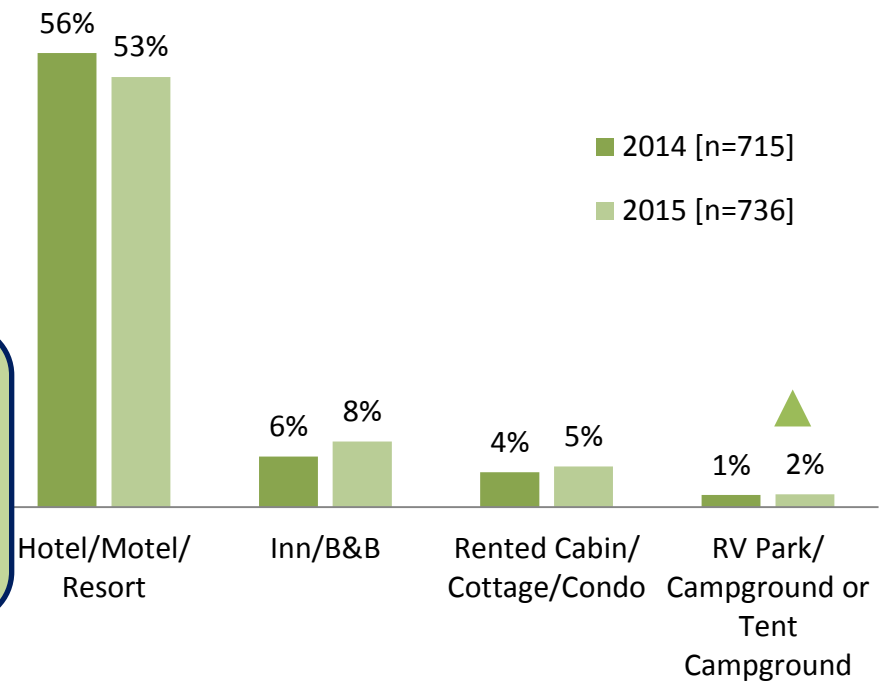
- On average, overnight visitors are staying in Maine for 3-4 nights. The average length of stay is longer for first-time visitors, those traveling with children, and those from outside New England.

Type of Accommodation  
[n=736]



Canadians are more likely to stay in paid accommodations.

Type of Paid Accommodation



**Average Length of Stay: 3.5 Nights**

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

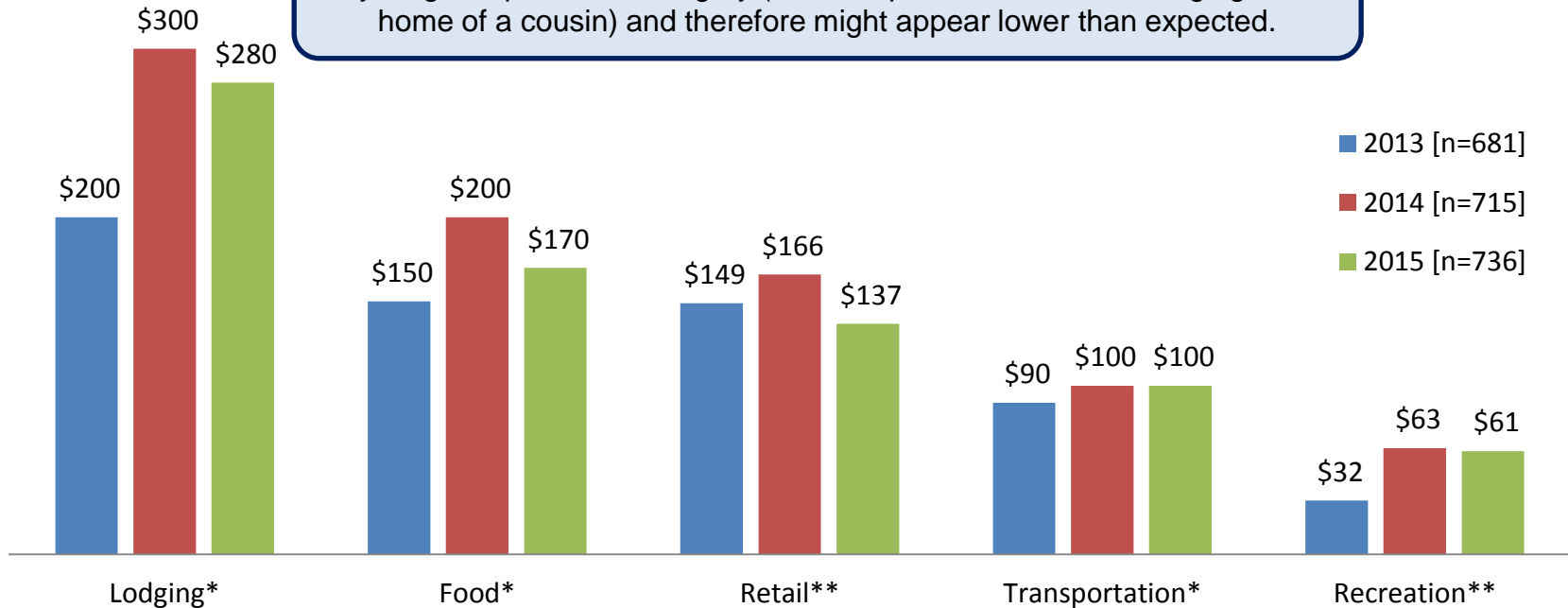
Overnight Q21. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

# Lodging and food expenditures continue to make up the greatest share of expenditures among Fall overnight visitors.

## Average Spending per Travel Party – Overnight Visitors

Estimates are based on all respondents, including those who did not spend anything in a particular category (for example, a VFR traveler lodging at the home of a cousin) and therefore might appear lower than expected.



\*Median Expenditures, Including 0.

\*\*Mean Expenditures, Including 0. The 2014 questionnaire included additional examples of Retail and Recreation expenditure items that weren't included in prior versions of the questionnaire. Comparisons between 2013 and 2014 must be done cautiously.

▲ ▼ notes significant difference between 2014 and 2015 at the 95% confidence level

# Day visitors spent the most on retail shopping and food while visiting Maine during the 2014 Fall season.

## Average Spending per Travel Party – Day Visitors

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# Trip Evaluation

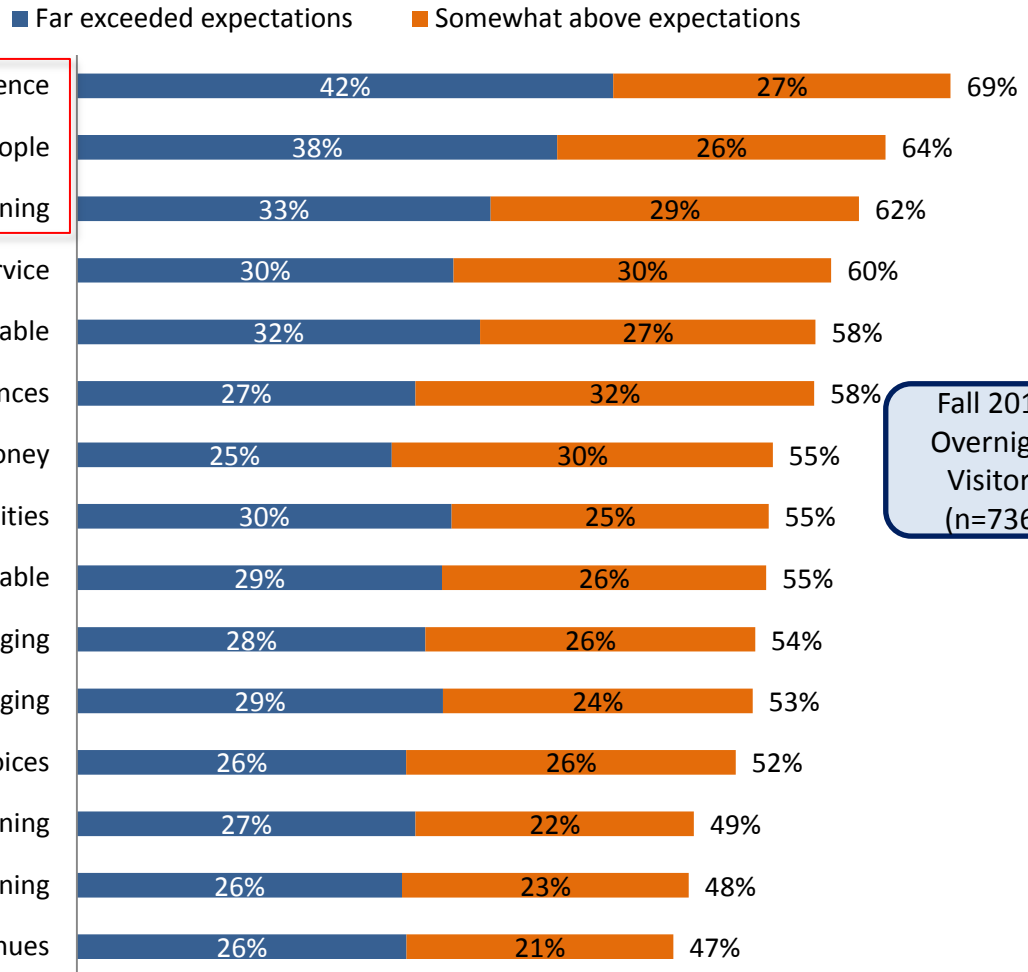


# The overall experience of a visit to Maine and the friendly people are the items that most impressed overnight visitors.

- US residents, first-time visitors, those traveling with kids, and younger visitors all report higher levels of expectations being exceeded for several categories.

Higher proportions of Fall 2015 overnight visitors reported that Maine exceeded their expectations than did Fall 2014 overnight visitors.

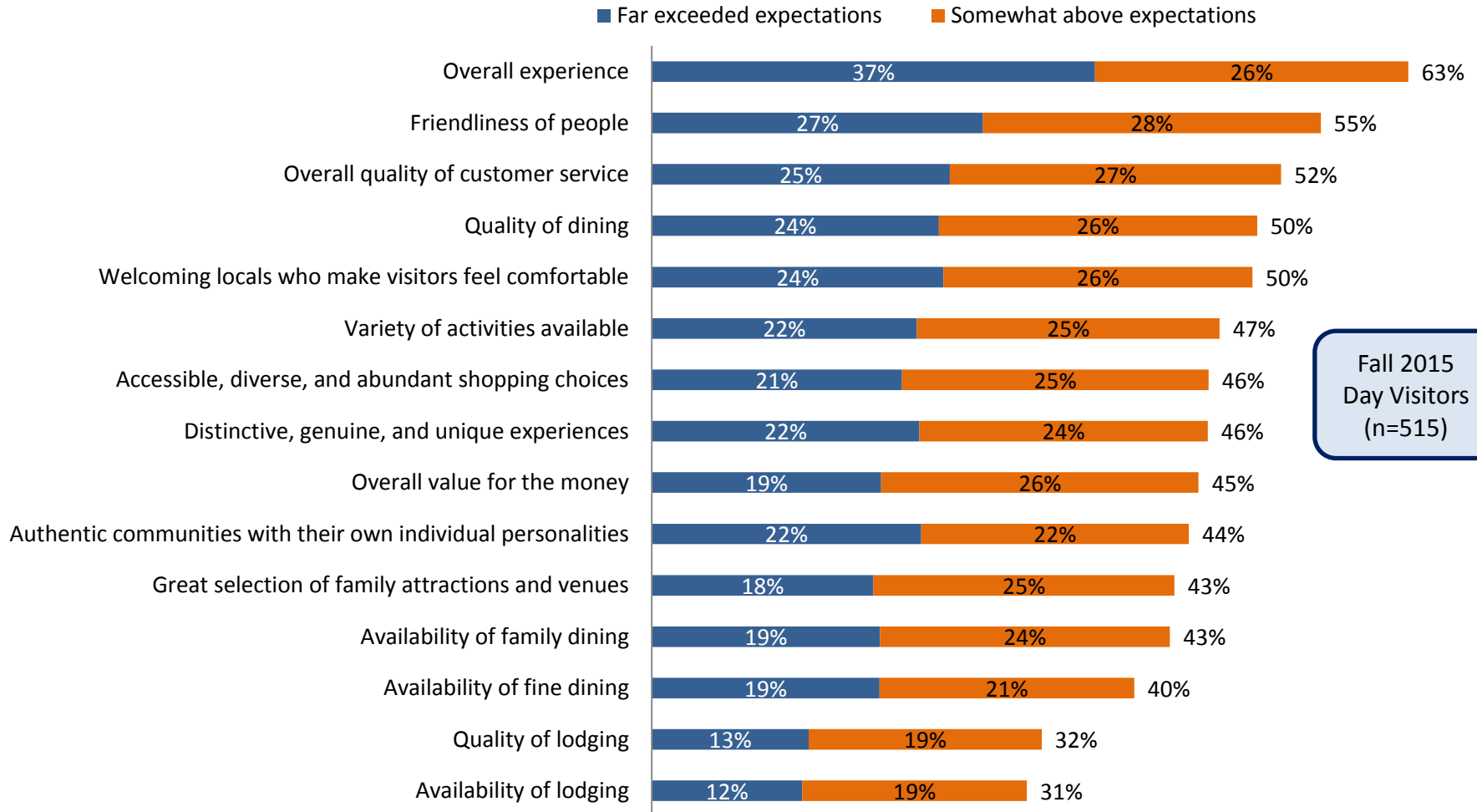
Overall experience  
Friendliness of people  
Quality of dining



Fall 2015 Overnight Visitors (n=736)



# The overall experience of a visit to Maine and the friendly people are also the items that most impressed day visitors.



Fall 2015  
Day Visitors  
(n=515)

# Visitor satisfaction appears lower this Fall (2015) than reported for the prior Fall (2014) in a number of categories.

- In eight of the fifteen categories, a *lower* proportion of Fall day visitors indicated that Maine had exceeded their expectations, as compared to the prior year. This contrasts the year-over-year improvements seen in most categories during the Winter and Summer seasons.

Day Visitor Satisfaction Levels: % Exceeded/Somewhat Above Expectations	Top 2 Box 2014 (n=511)	Top 2 Box 2015 (n=515)
Overall experience	70%	63% ▼
Friendliness of people	60%	55%
Overall quality of customer service	57%	52%
Quality of dining	60%	50% ▼
Welcoming locals who make visitors feel comfortable	55%	50%
Variety of activities available	49%	47%
Accessible, diverse, and abundant shopping choices	53%	46% ▼
Distinctive, genuine, and unique experiences	55%	46% ▼
Overall value for the money	53%	45% ▼
Authentic communities with their own individual personalities	54%	44% ▼
Great selection of family attractions and venues	46%	43%
Availability of family dining	50%	43% ▼
Availability of fine dining	44%	40%
Quality of lodging	37%	32%
Availability of lodging	39%	31% ▼

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.

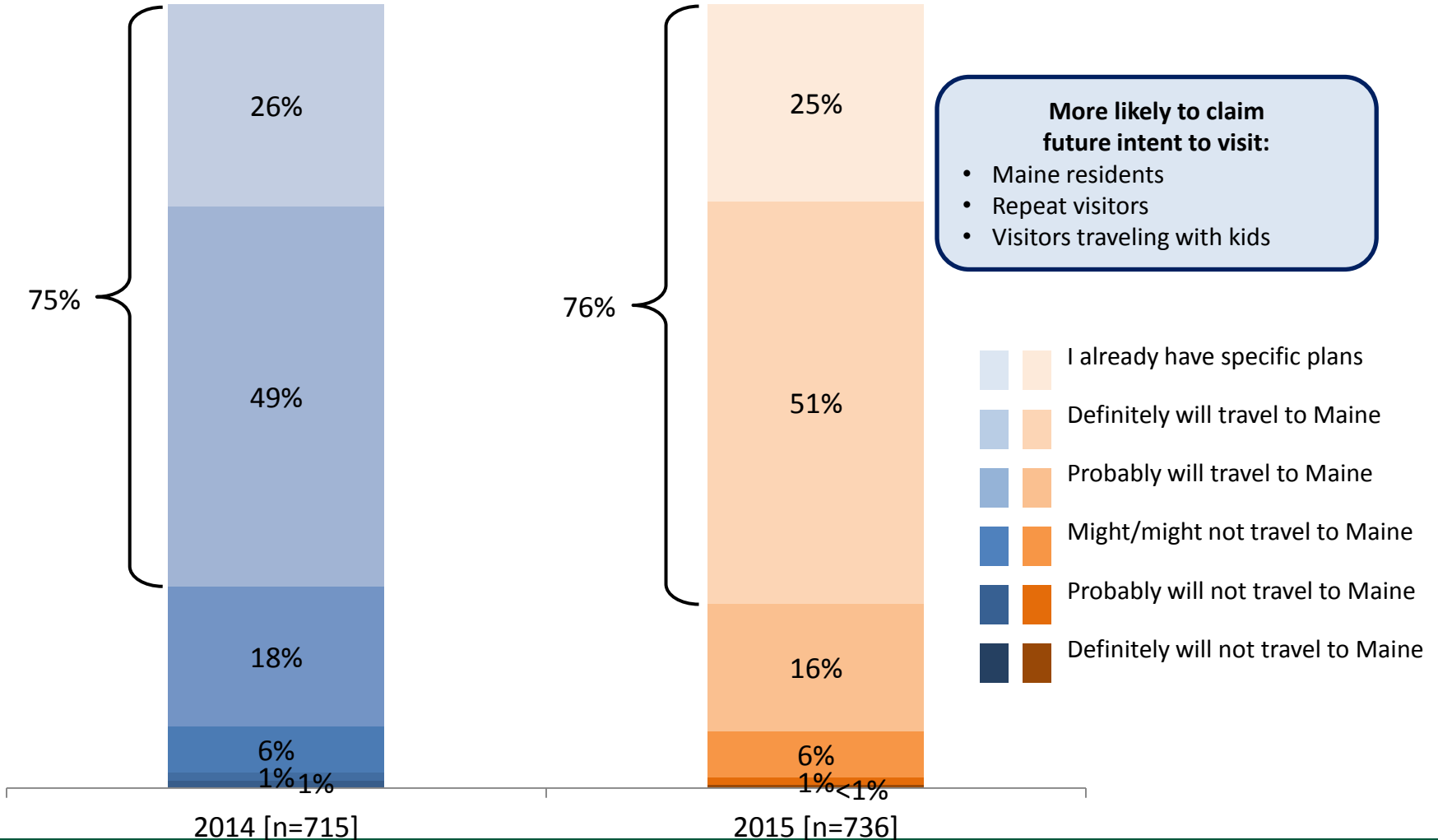
▲ ▼ notes significant difference between the current and prior year at the 95% confidence level

# Future Travel



# Three-fourths of Maine's overnight Fall visitors plan to visit Maine again in the next two years.

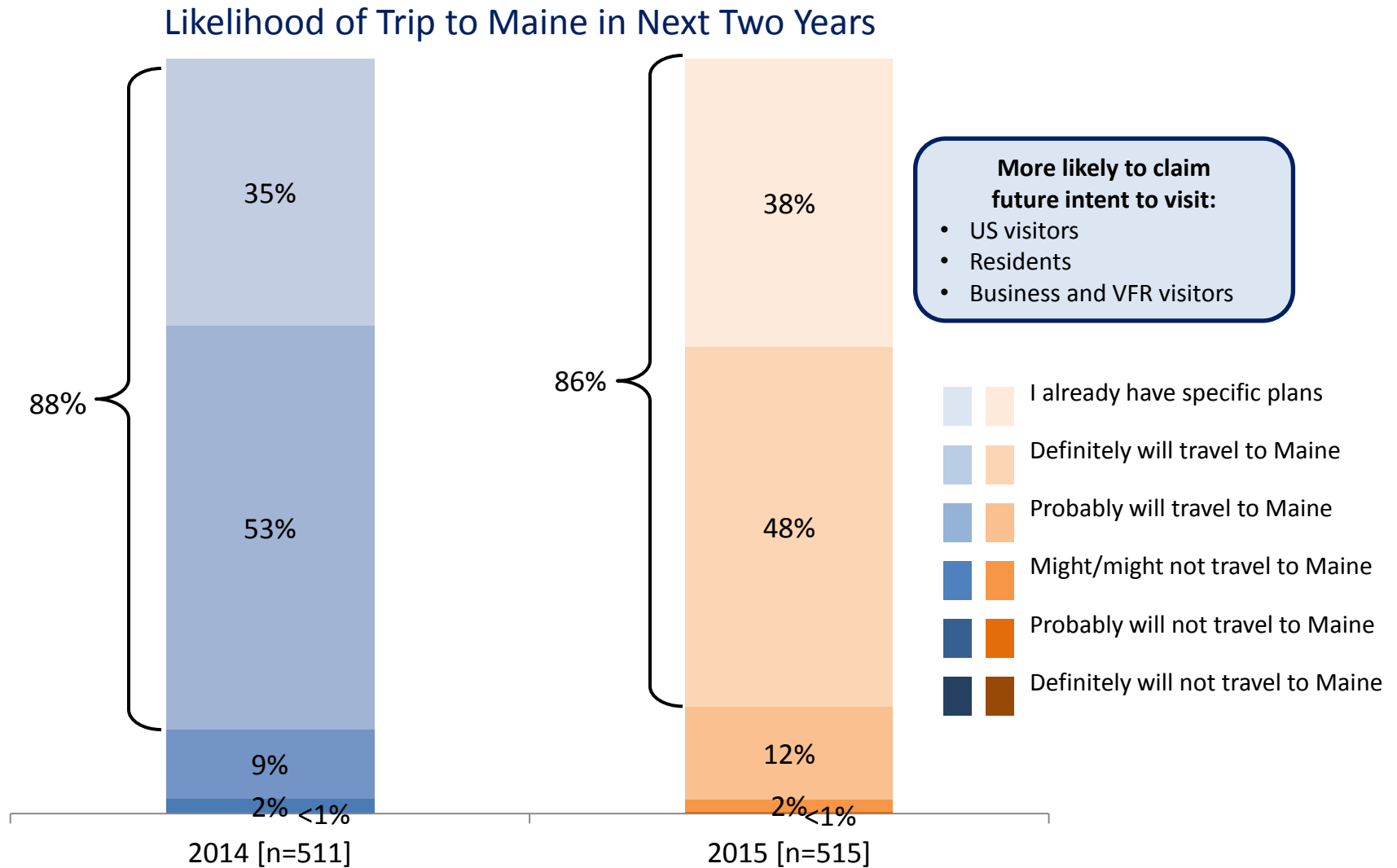
## Likelihood of Trip to Maine in Next Two Years



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

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

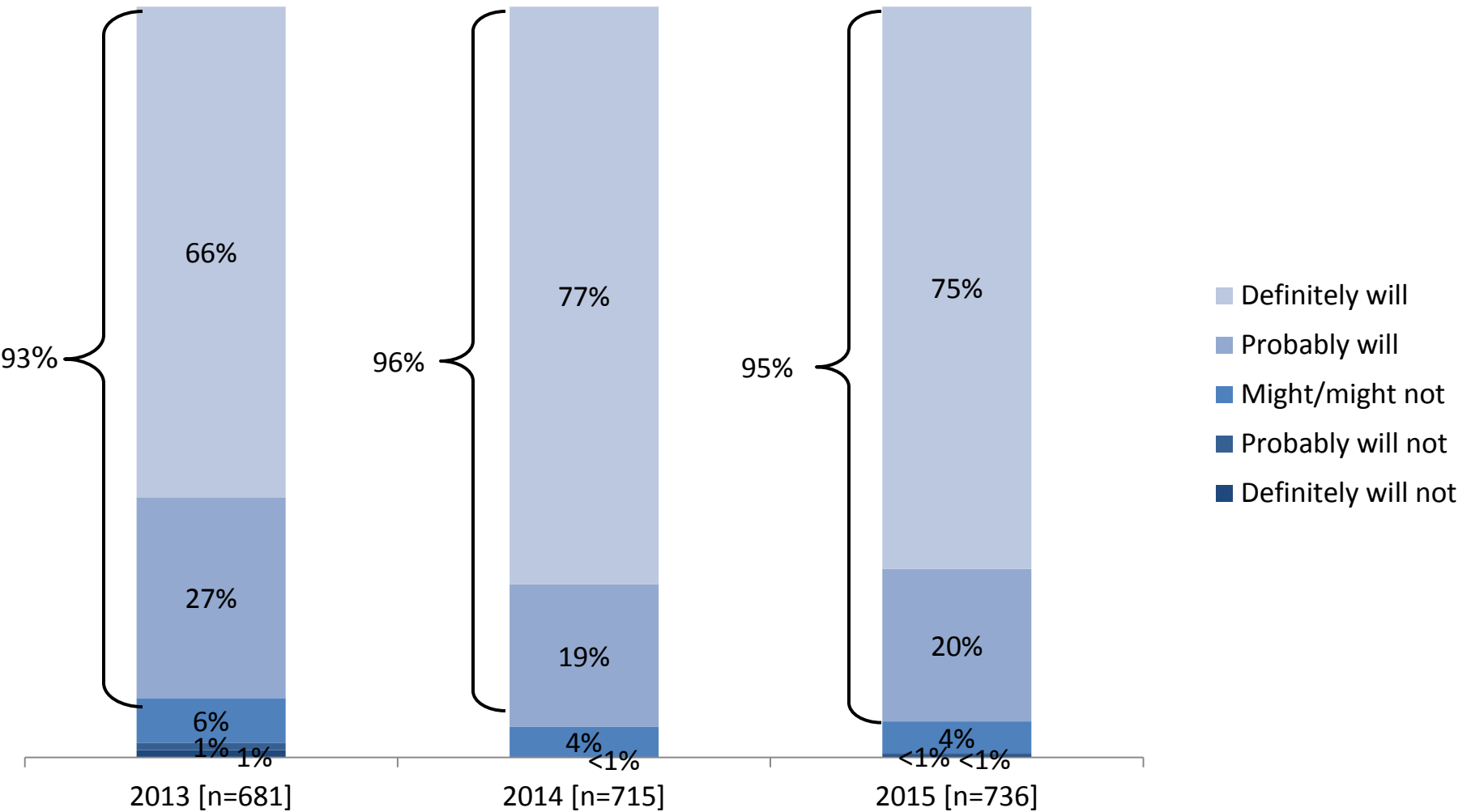
# Day visitors express an even stronger future intent to visit Maine, with nearly nine in ten planning to visit again.



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

▲ ▼ notes significant difference between 2014 and 2015 at the 95% confidence level

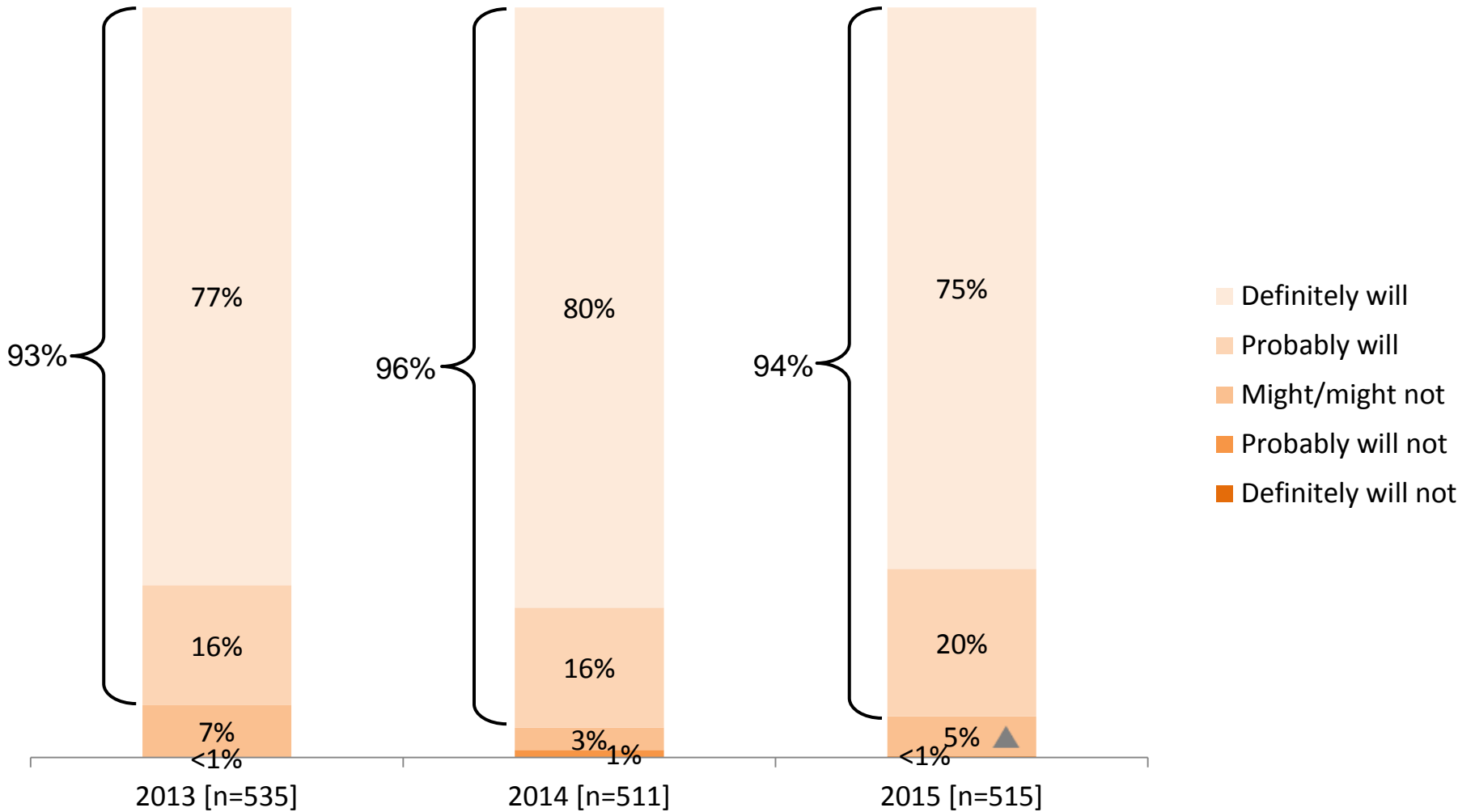
# Overnight visitors' excitement with their vacation in Maine is echoed in their intent to recommend Maine as a vacation destination.



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 view their visit to Maine similarly, with 96% indicating that they're likely 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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