

Maine Office of Tourism Visitor Tracking Research

Summer 2015 Seasonal Topline

Prepared by



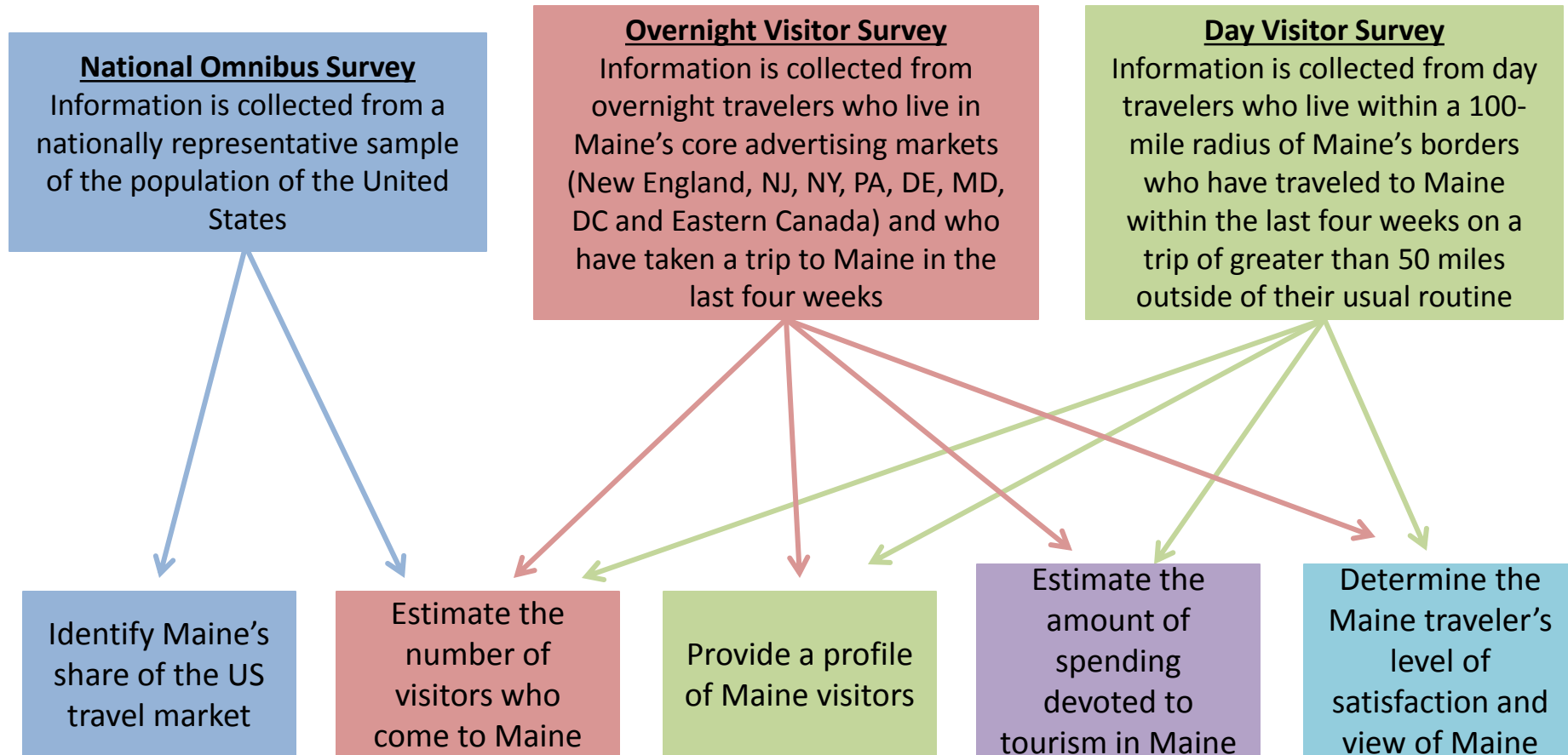
October 2015

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 2015. At the conclusion of the 2015 travel reporting season (December 2015), adjustments will be made to account for seasonal fluctuations and revised estimates will be presented in the Annual Report.

- Nationwide overnight travel from May to August 2015 showed an increase when compared with the two prior summer seasons. This increase was seen in leisure, VFR, and business travel. The 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 throughout the nation. Maine shared in this growth, experiencing a nearly 4% increase in tourism-related overnight visitation to the State and a 5.8% increase in day visitation.
- The proportion of overnight visitors arriving from the Mid-Atlantic region showed an increase this summer over the prior summer season (2014). This year-over-year increase in visitation from the Mid-Atlantic region was also seen in the Winter/Spring 2015 period. Increased targeting of markets further away from Maine appears to be drawing in more visitors from the Mid-Atlantic. 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. They are also younger and more likely to be traveling with children.

Executive Summary

- A continued drop in the Canadian exchange rate appears to be influencing Canadian visitors' decision to visit the United States and specifically, Maine. As the exchange rate declined in 2014, the proportion of Canadians visiting Maine also declined. Given Canadians' high propensity to shop and stay in paid accommodations while visiting Maine, this is not surprising. The proportion of Canadian visitors in Maine during the 2015 summer season is similar to the 2014 summer season, suggesting that a continued decrease in the exchange rate during 2015 has not perpetuated this decline in visitation. Nonetheless, 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.
- *Food/shopping/culinary* activities and *shopping* activities remain the top interest areas among both overnight and day visitors to Maine. 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. Though dining and shopping remain the top interests among Maine's visitors, *touring/sightseeing* and various *outdoor activities* fall closely behind.

Executive Summary

- Not surprisingly, the Maine Beaches region continues to be the State's main draw during the summer season, with 27% of overnight visitors and 35% of day visitors listing this region as their primary destination in Maine. This region is most popular among repeat visitors, leisure travelers, and those traveling with children. The challenge of pulling these beach visitors further into the State remains. Ideas for beach vacation add-ons should be highlighted and promoted within Maine's ongoing advertising.
- Maine continues to receive extremely favorable evaluations from its visitors, especially on those attributes related to Maine's people. Similar to prior seasons, more than half of Maine's summer 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*. Among overnight visitors, these ratings were even higher during the 2015 summer season than they had been for the 2014 summer season. Residents are a valuable component of the Maine vacation experience, and continued promotion of this asset is warranted.

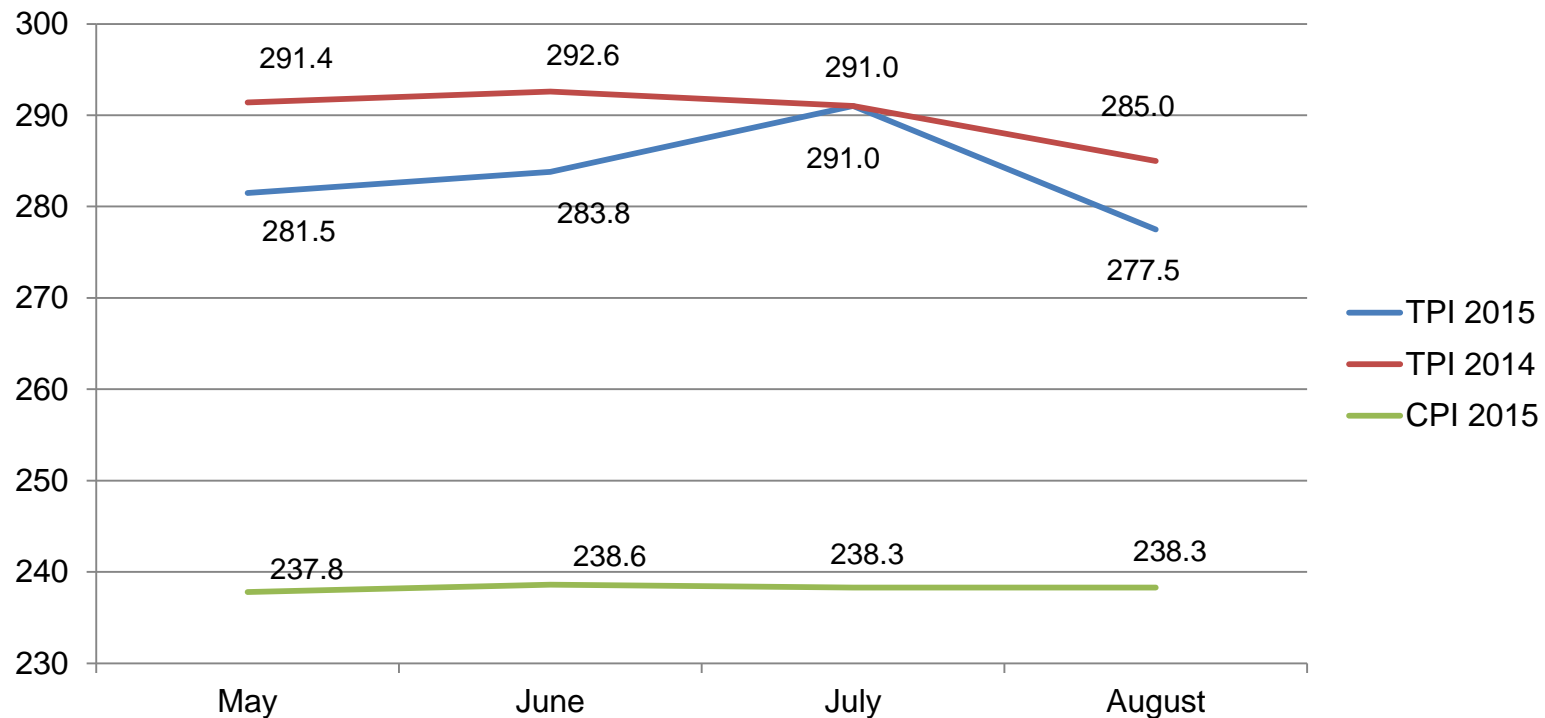
2015 Summer Season Travel Context



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

- However, the Summer 2015 TPI Index (averaging 283.5) came in lower than the Summer 2014 Index (averaging 290), while the Consumer Price Index showed no change. This may signal a potential drop in the relative cost of travel as compared to other goods.

Consumer Price Index and Travel Price Index

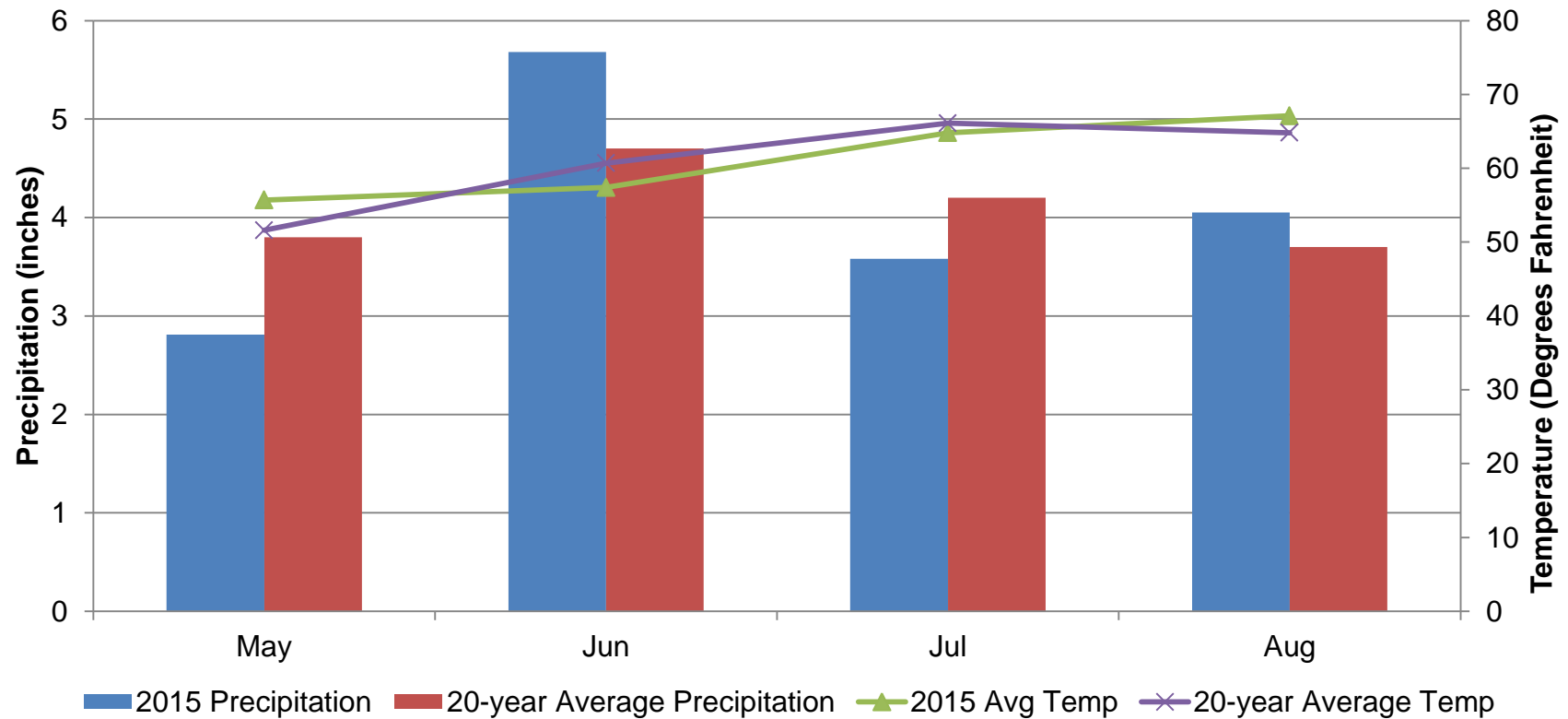


Data Sources: CPI figures are from the US Bureau of Labor Statistics. TPI figures are from the US Travel Association.

The month of June saw above average precipitation for the State of Maine, with temperatures below the historical average.

- May and July 2015 showed below average precipitation, but temperatures were just about average.

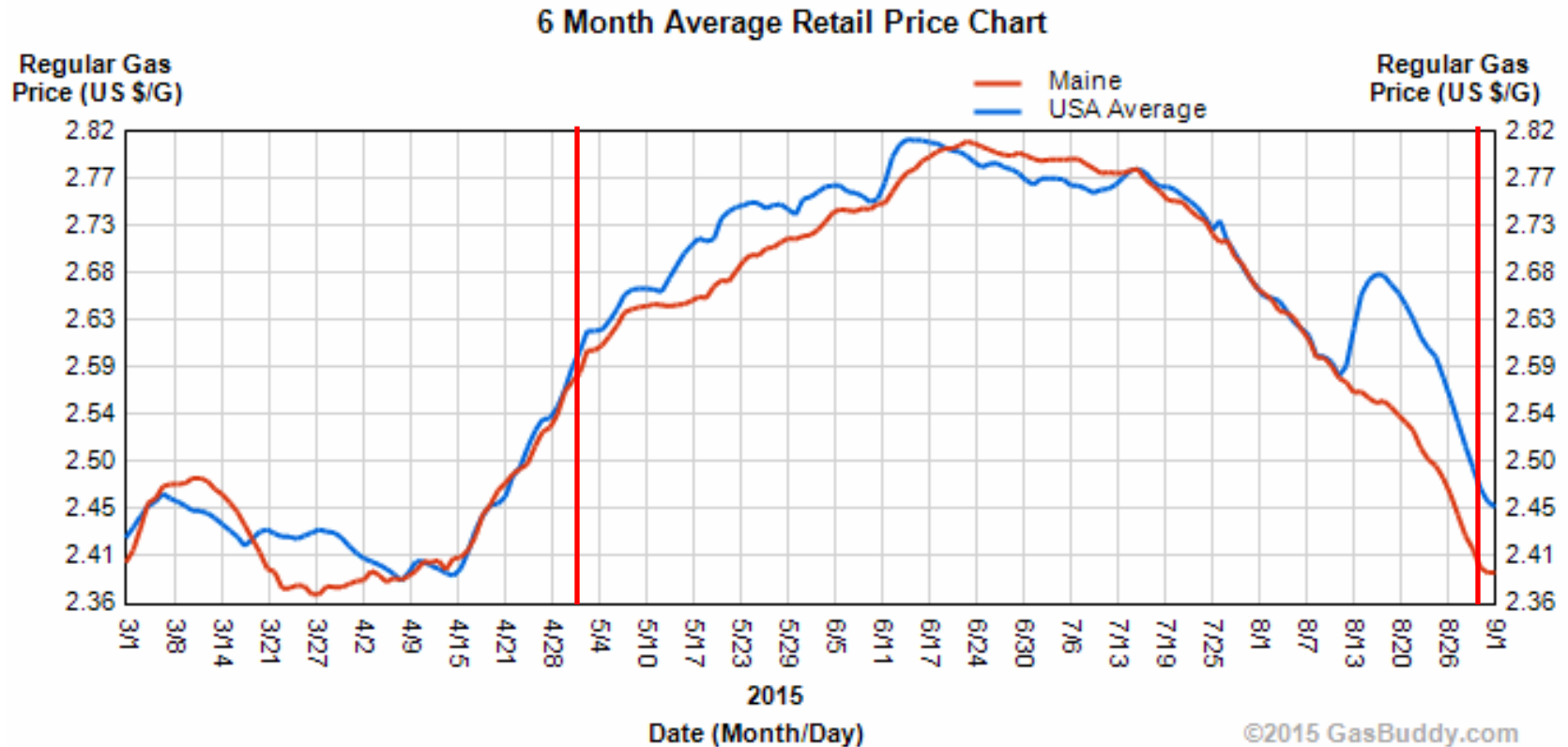
Precipitation and Temperature – Maine Summer 2015



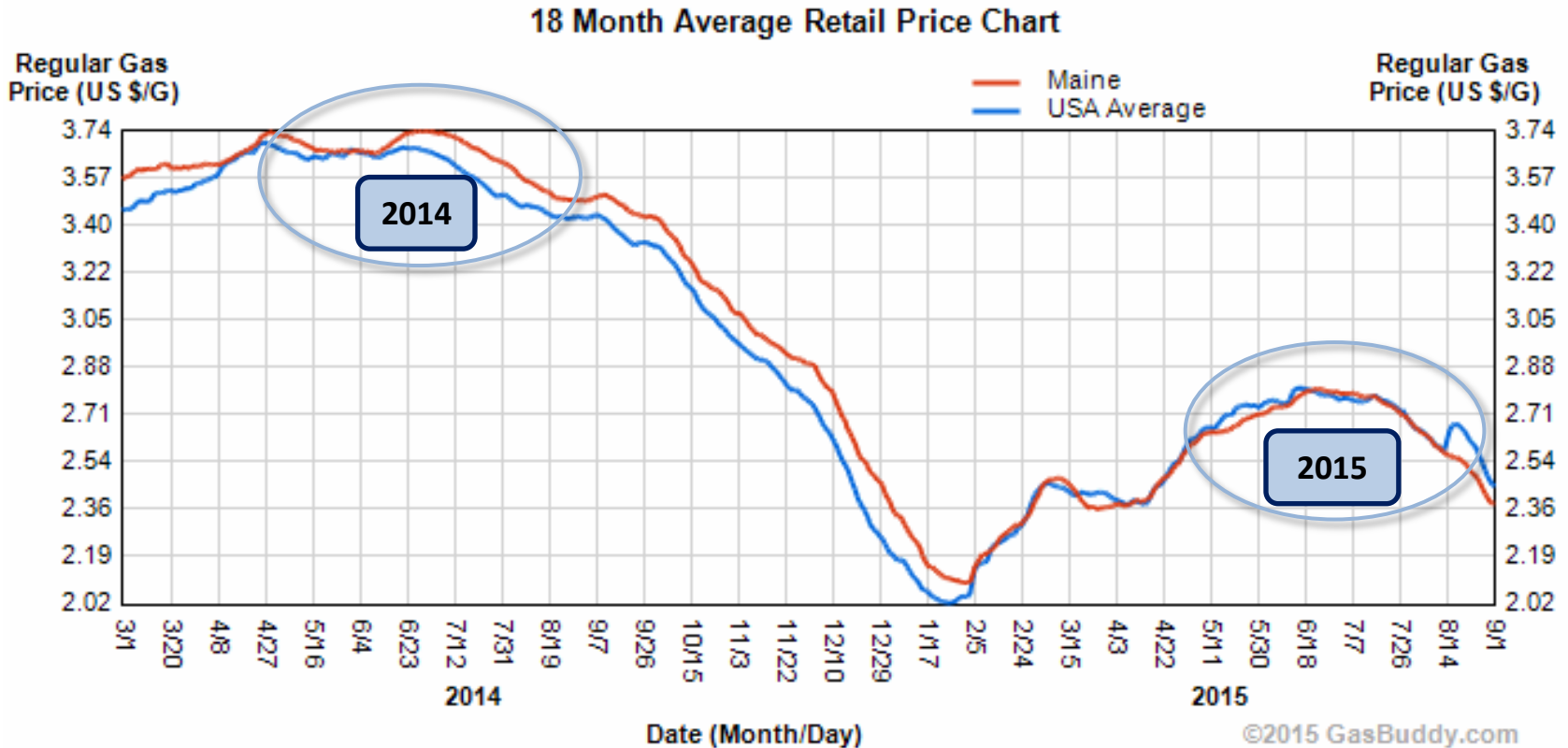
Data Source: NOAA Climate Center

Maine gas prices were either equal to or below US prices during the Summer season, with the exception of mid-June through Mid-July.

- The high price of gasoline in Maine and the US began to decline dramatically towards the end of the summer season, as is typical.

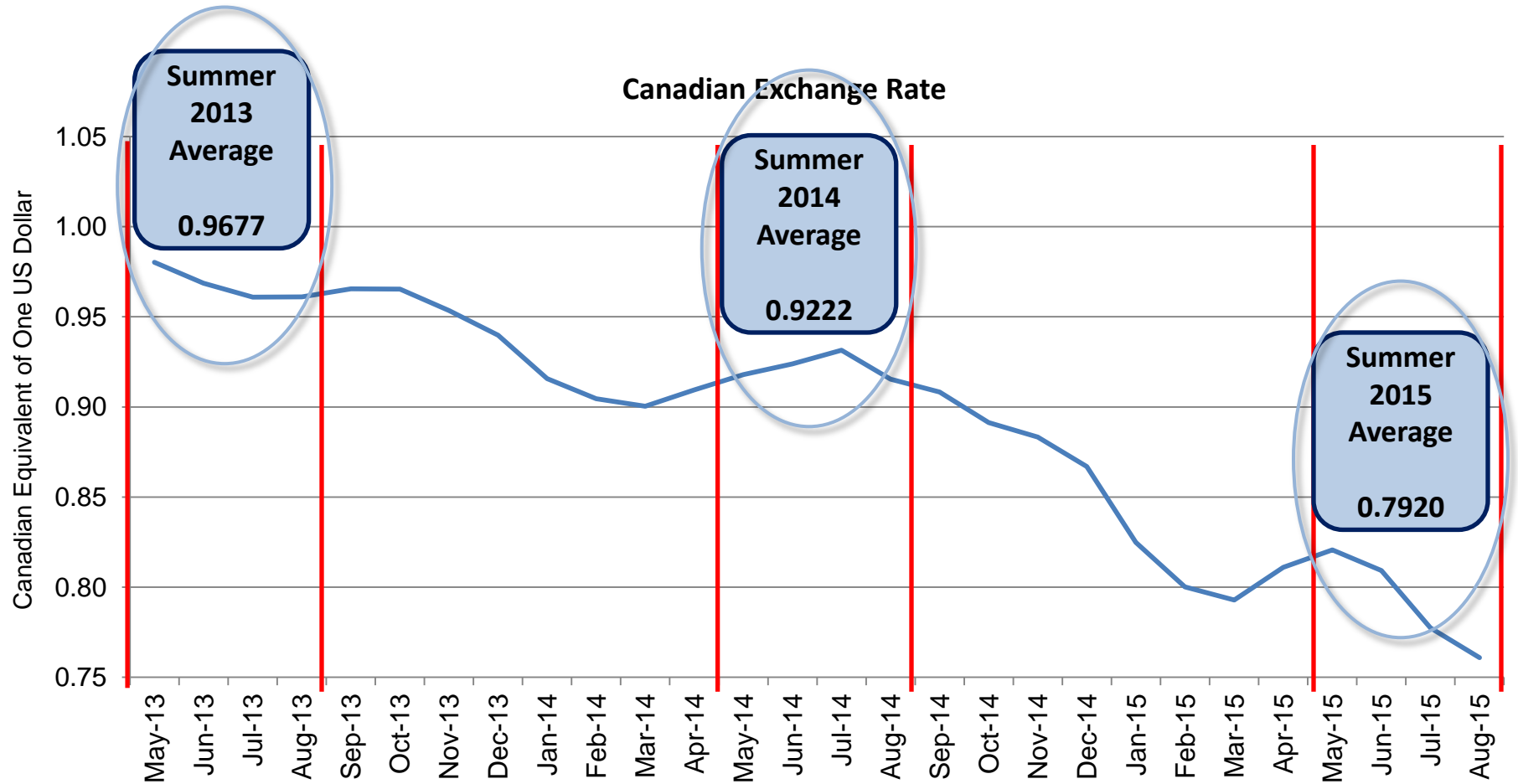


Compared to the prior summer season (2014) gas prices nationwide and in Maine were significantly lower this summer (2015).



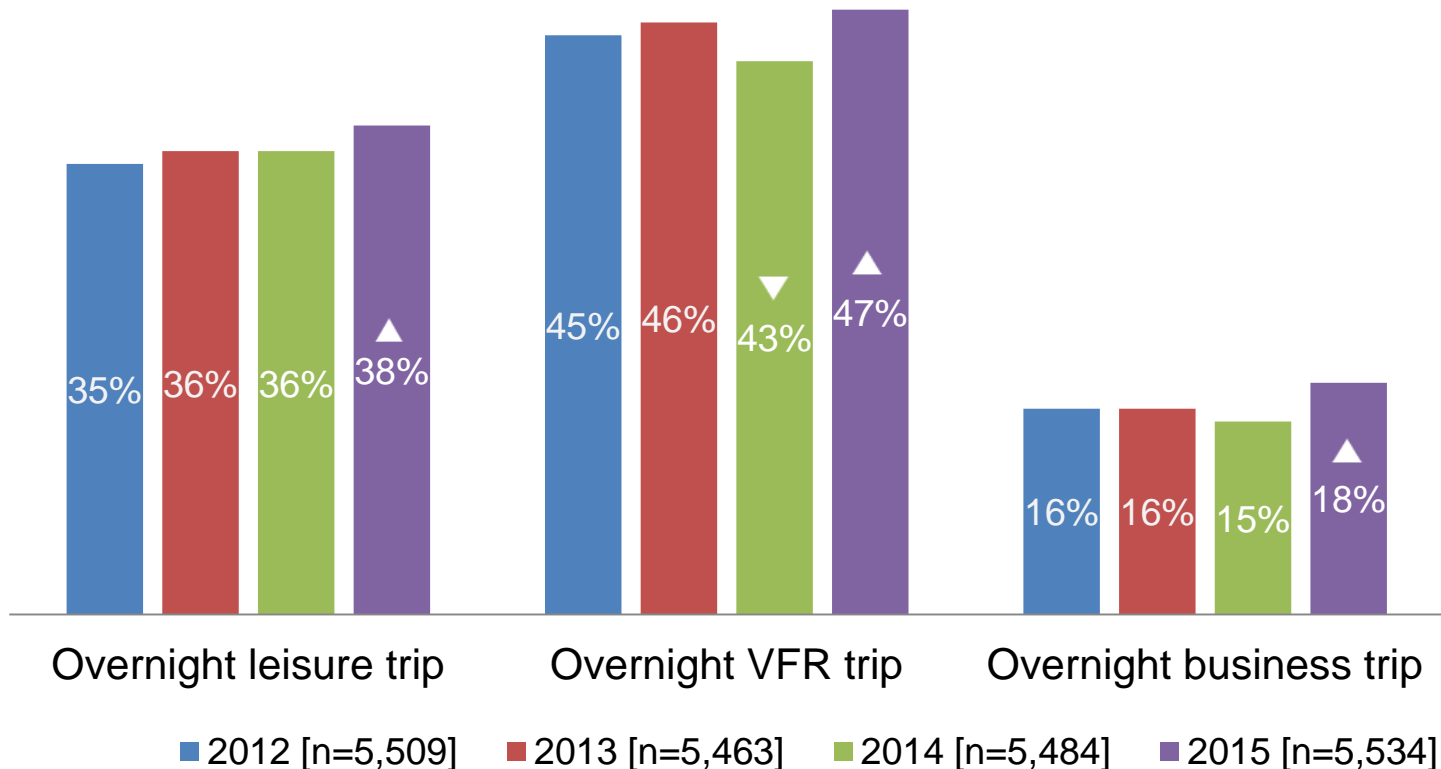
The Canadian exchange rate continued its decline during the 2015 summer season.

- Since the 2013 summer season, the Canadian exchange rate has dropped from a favorable 0.97 down to an unfavorable 0.79.



Nationwide summer travel showed a moderate increase over the prior summer season.

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

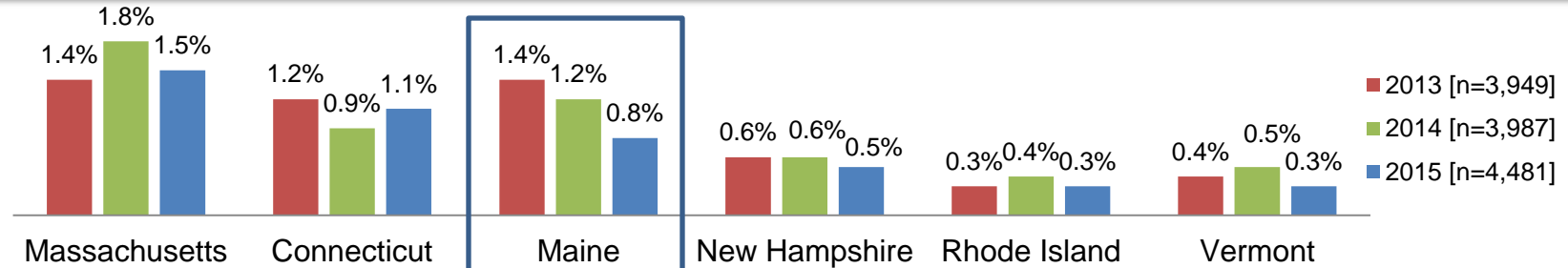


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

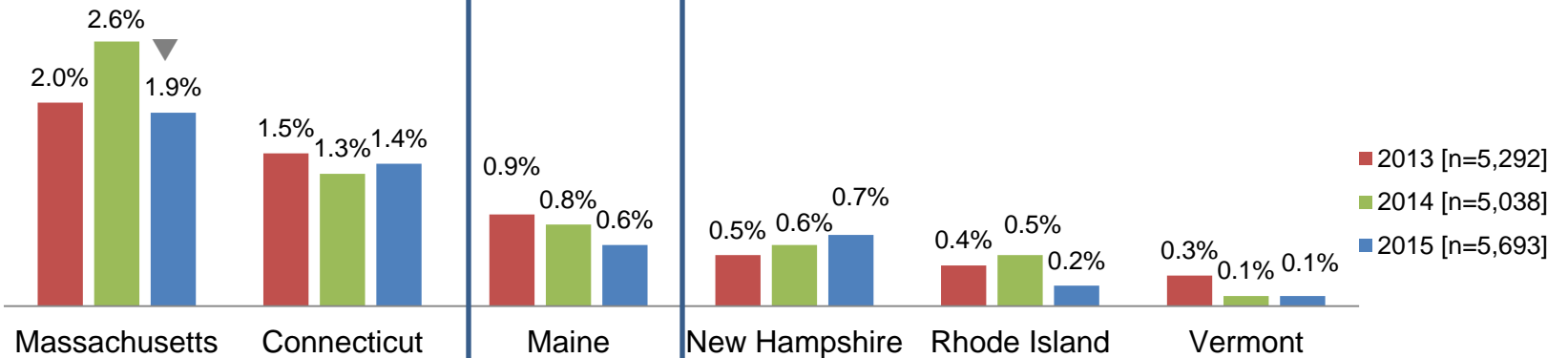
▲ ▼ notes significant difference between the current and prior year at the 95% confidence level

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

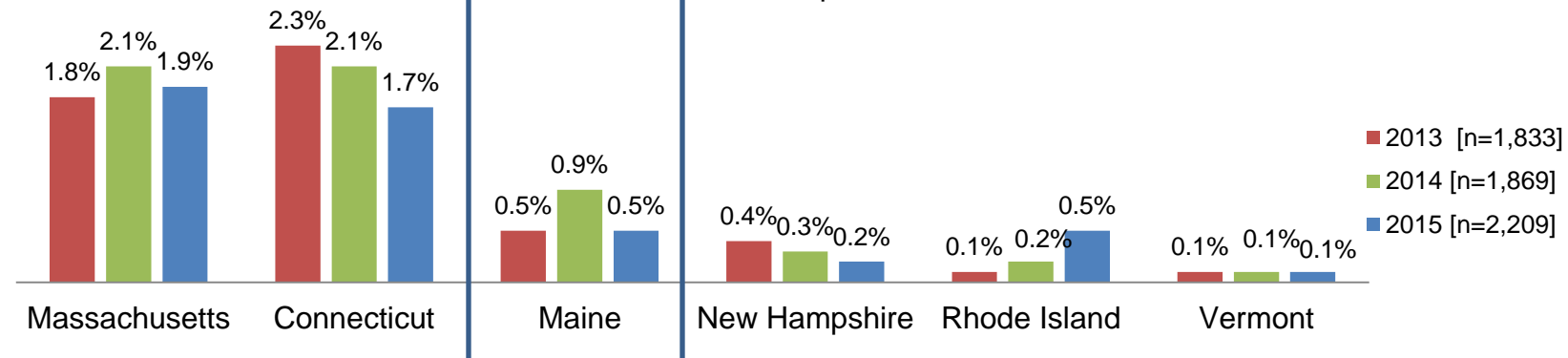
Overnight Leisure Trips



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 the current and prior year at the 95% confidence level

2015 Summer Season Highlights



Estimated summer visitation to Maine increased 5% from 2014 to 2015, with both day and overnight visitation showing strong growth.

Note: Visitation estimates provided here are preliminary and reflect visitation from May through August 2015. Adjustments will be made to these estimates at the end of the year for the Annual Report, to account for seasonal fluctuations.

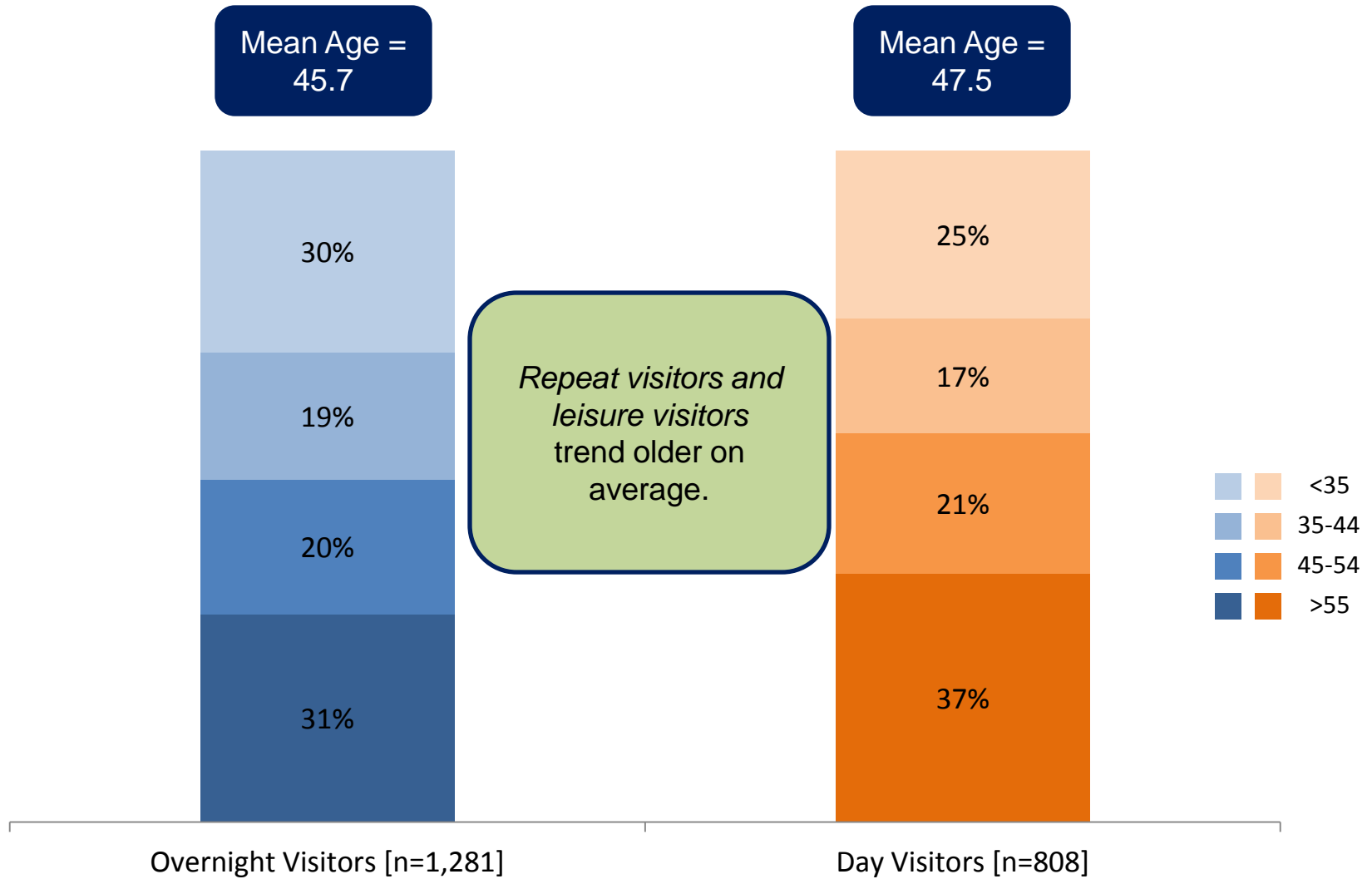
Visitation Estimates*	Summer 2014	Summer 2015	% Chg
Total Estimated Visitation	23,103,900	24,254,902	+ 5.0%
<i>Overnight Visitors</i>	<i>8,850,339</i>	<i>9,172,760</i>	<i>+ 3.6%</i>
<i>Day Visitors</i>	<i>14,253,561</i>	<i>15,082,142</i>	<i>+ 5.8%</i>

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

Tourism related trips include:

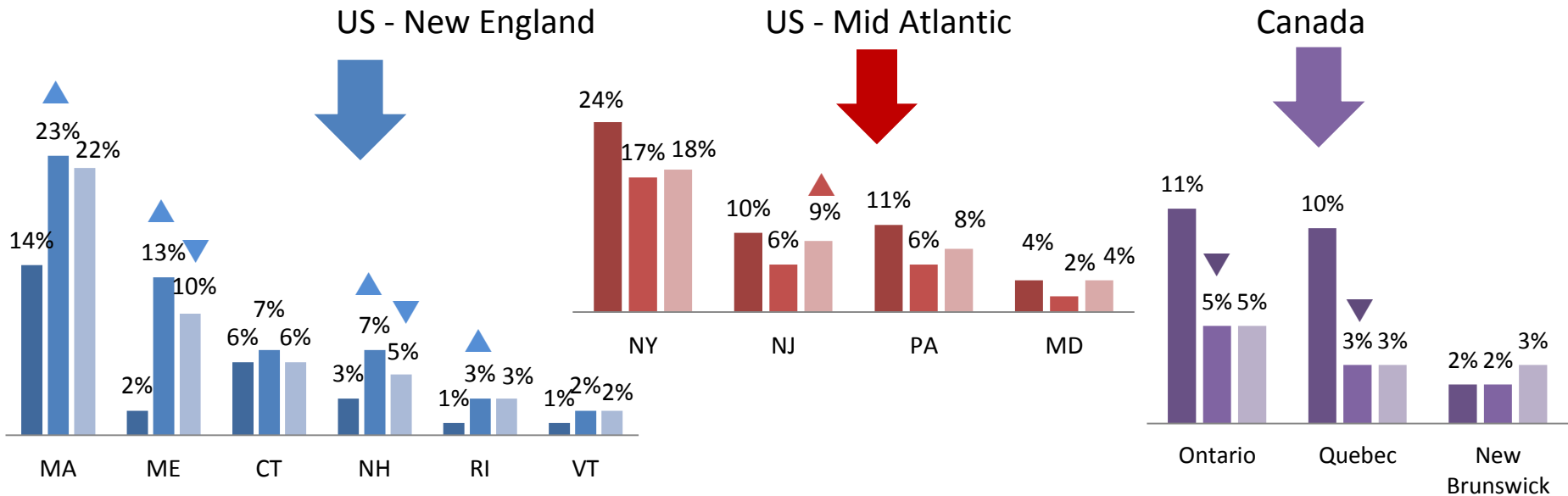
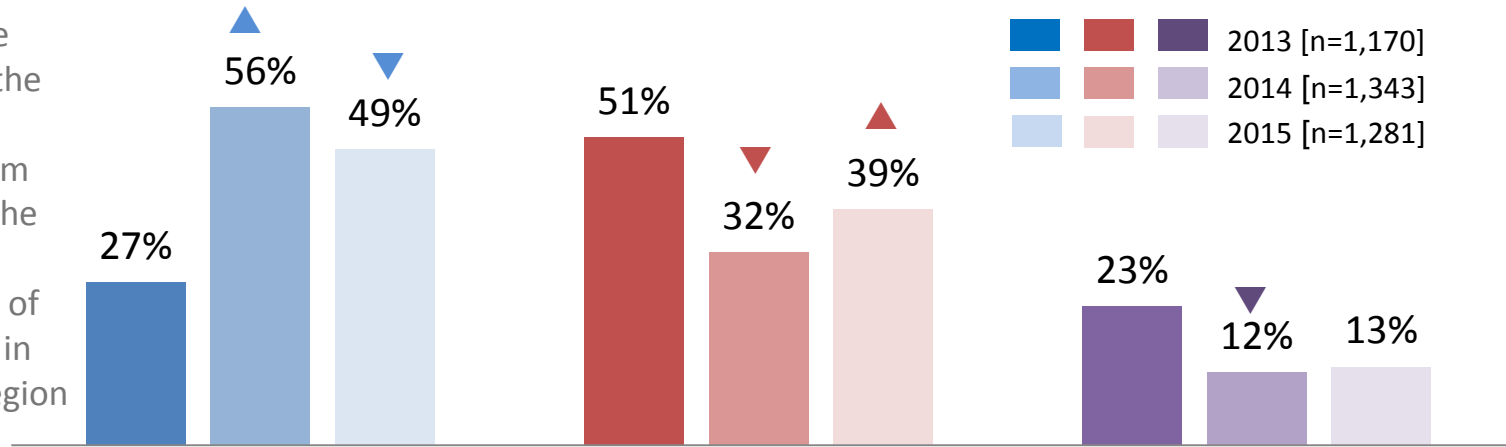
- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

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

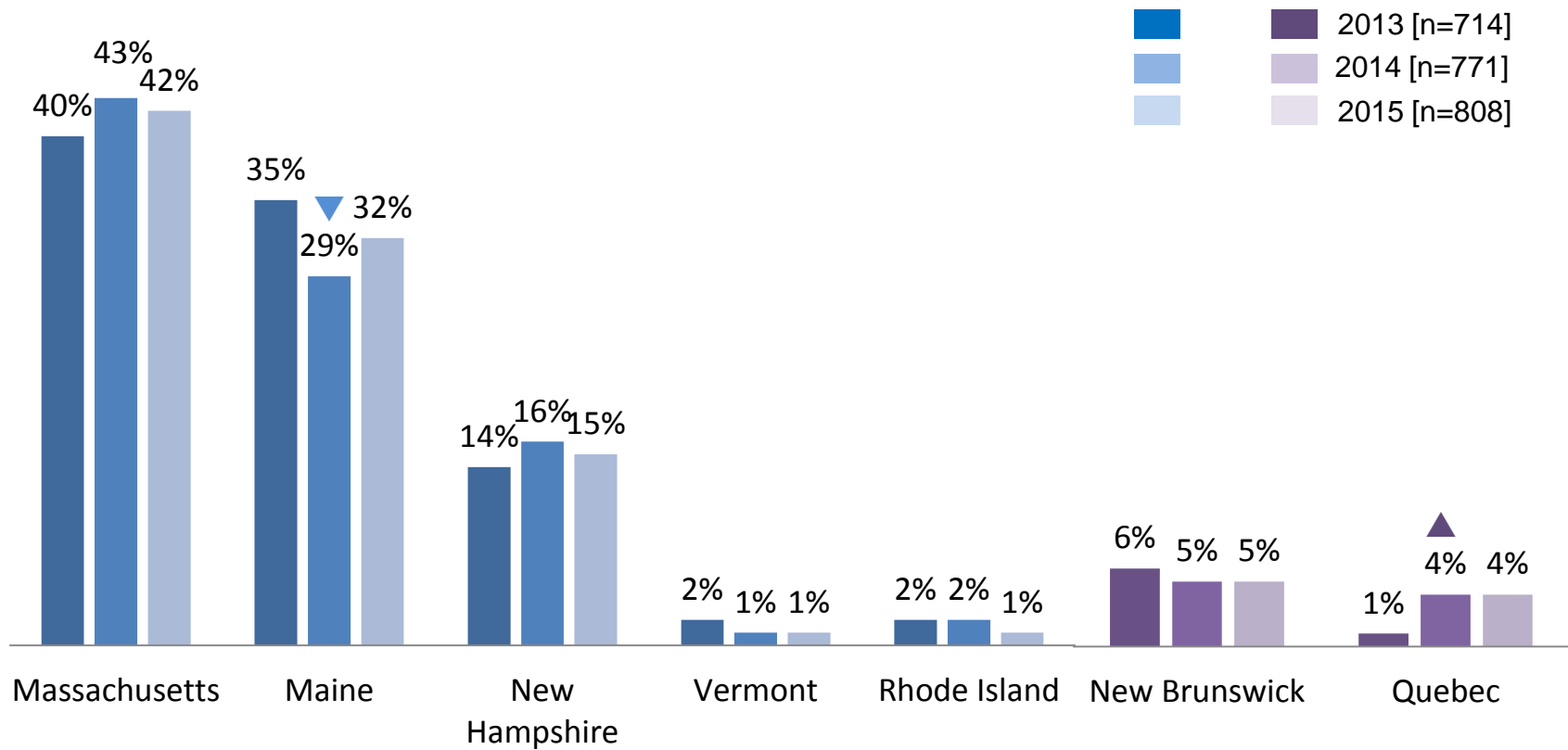


Summer 2015 showed no change in the relative proportions of visitors from Canada and the United States.

A slight shift can be seen, however, in the proportions of US visitors arriving from New England and the Mid-Atlantic, with higher proportions of visitors originating in the Mid-Atlantic region this summer.

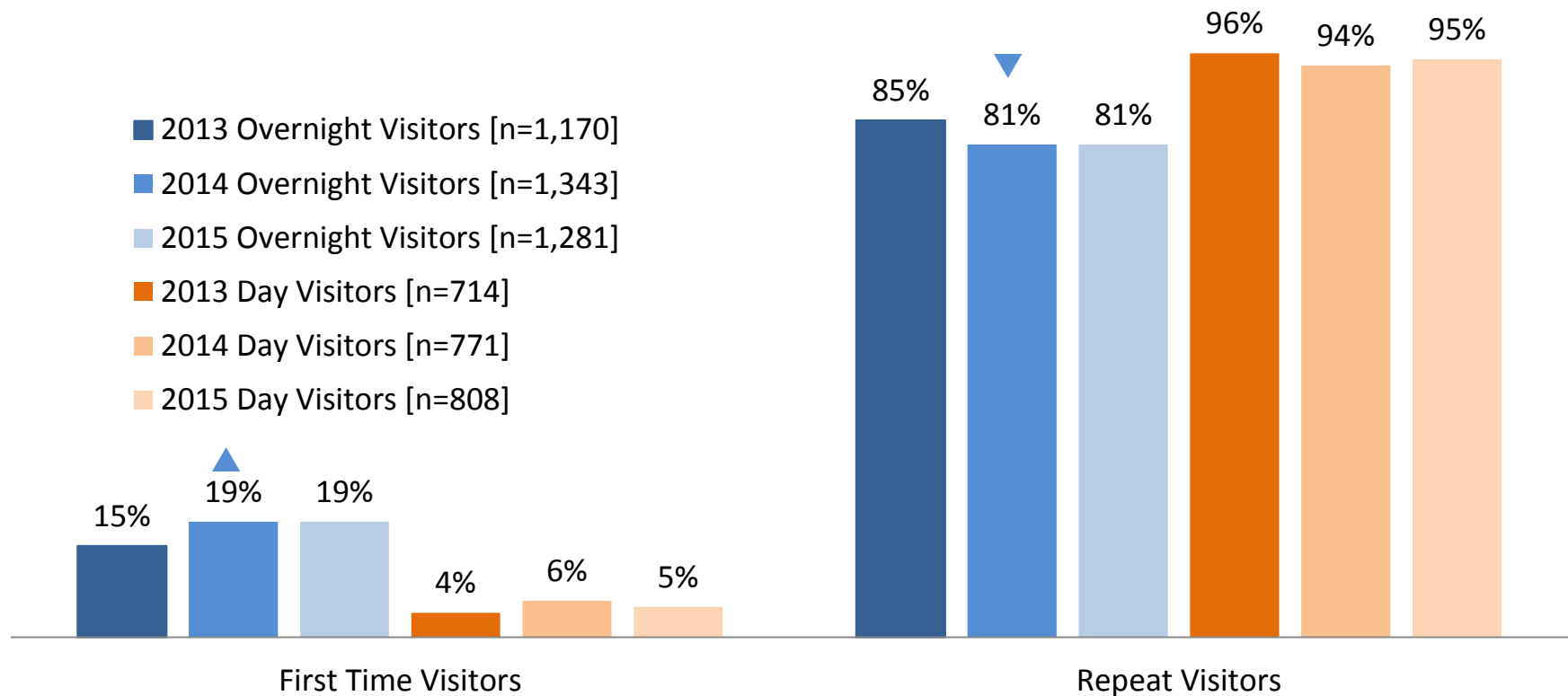


Massachusetts and Maine continue to provide the greatest proportions of summer day visitors to Maine.



After an increase in the proportion of first-time overnight visitors last summer (2014), the levels remained the same this summer.

- First time overnight and day visitors differ in their demographic attributes and travel patterns.
 - First time overnight visitors are more likely to be from Canada, stay in paid accommodations, travel with children, and be under the age of 55.
 - First time day visitors are also more likely to be from Canada, under the age of 45, and traveling with kids.

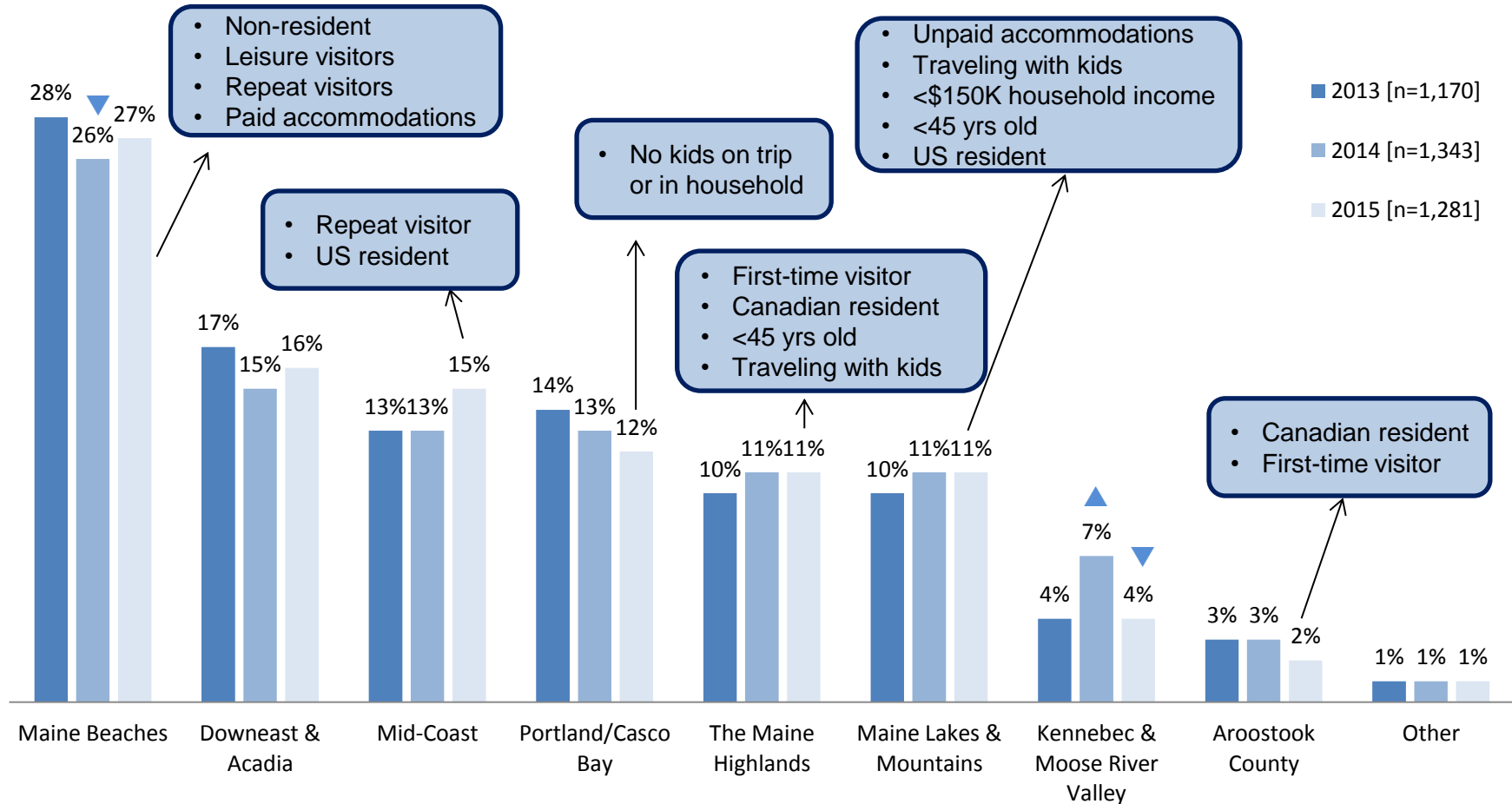


Overnight Q11, Day Q10. Was this your first visit to Maine?

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

Once again, one-fourth of Maine's summer overnight visitors came to the Maine Beaches region.

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

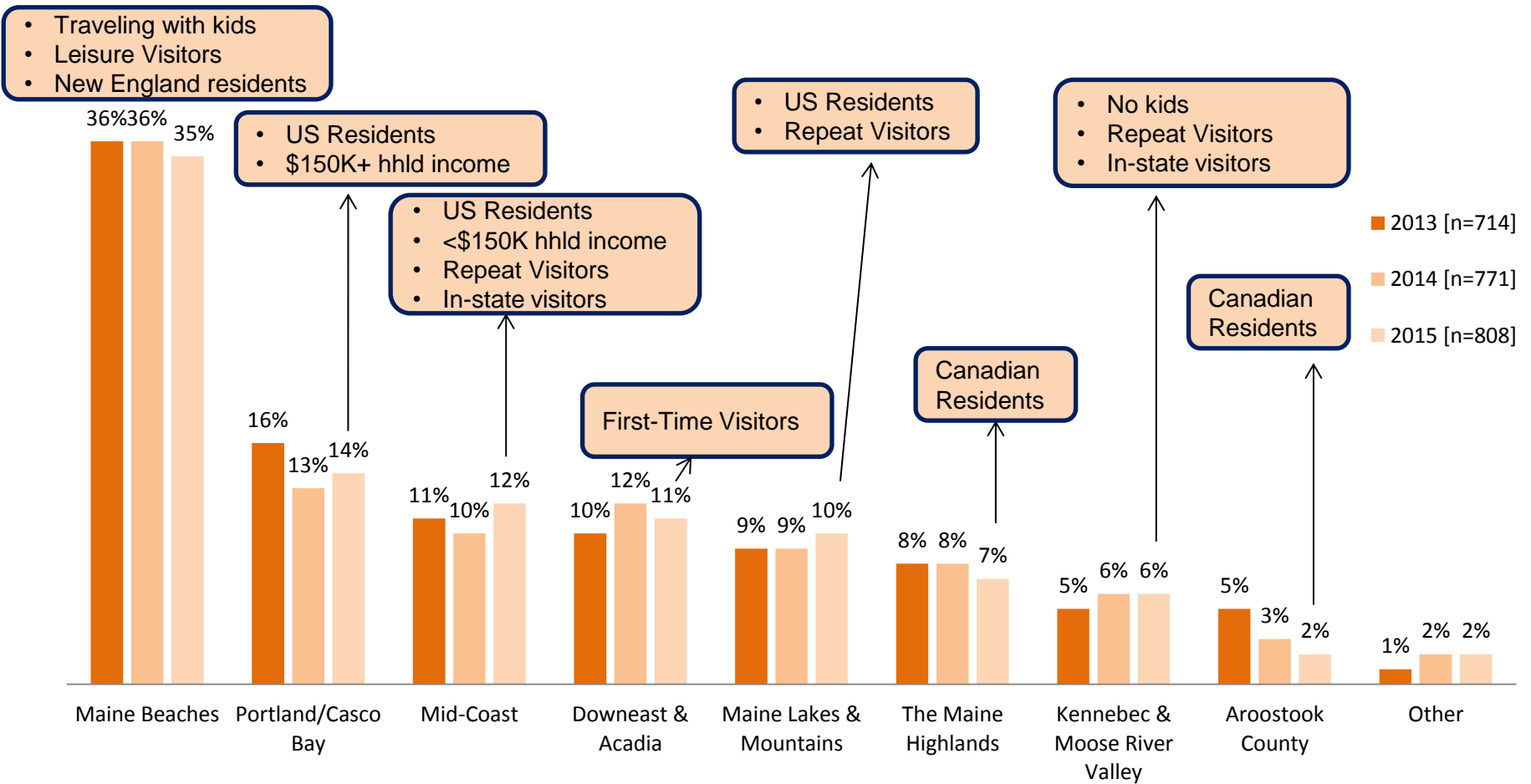


Overnight Q22. What region in Maine was your primary destination?

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

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

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

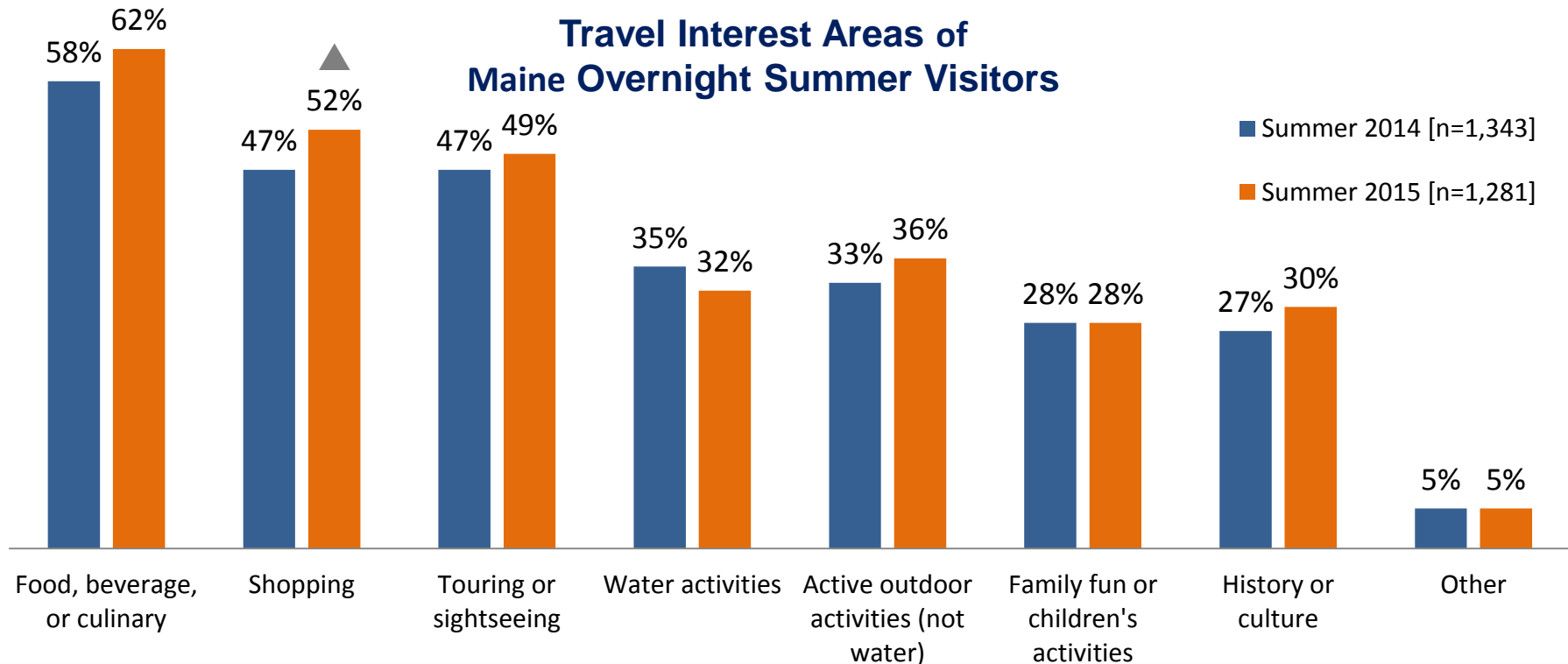


Day Q20. What region in Maine was your primary destination?

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

Most 2015 Maine overnight summer visitors were interested in exploring Maine's various *food/beverage/culinary* options or *shopping*.

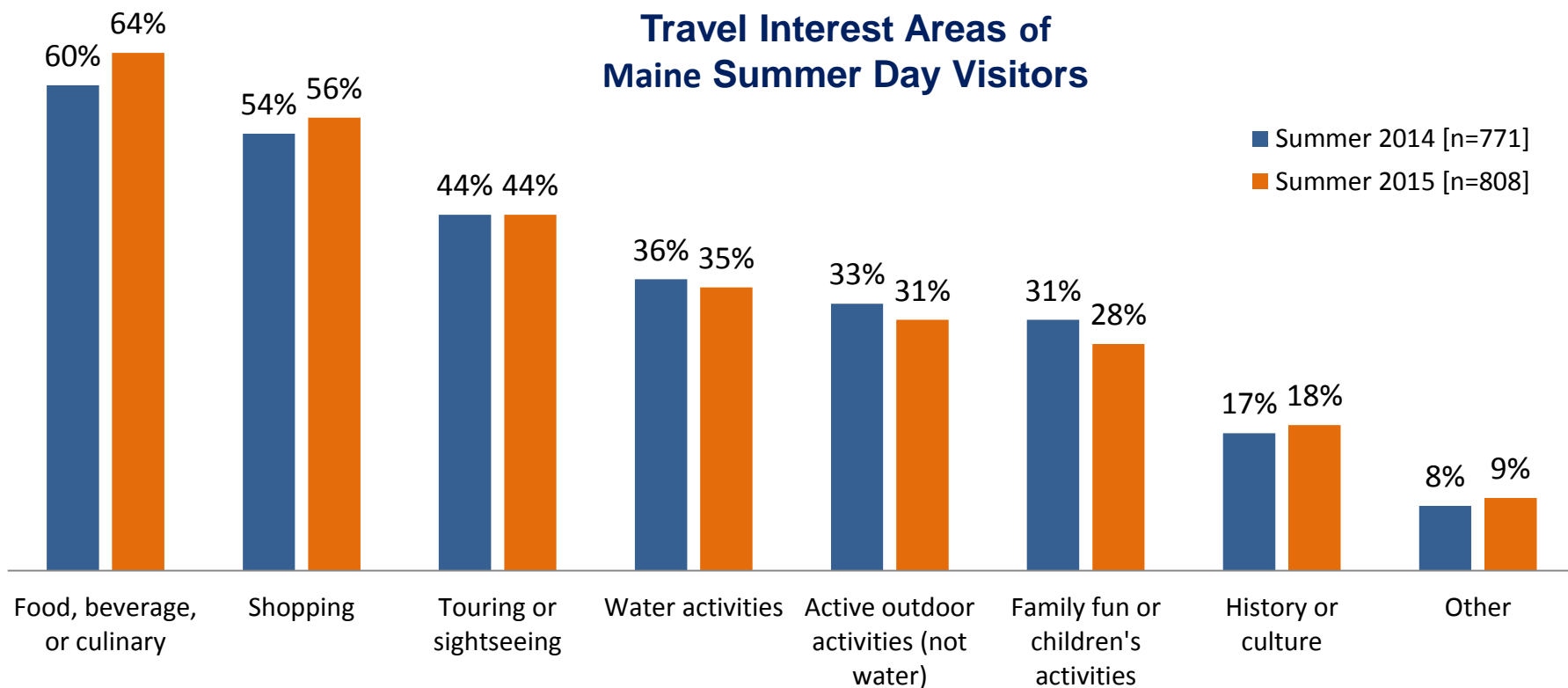
- The proportion of overnight summer visitors interested in *shopping* while visiting Maine is higher during this summer season than it was during the prior 2014 summer season.
- Visitors traveling with children are more likely to be interested in *water activities*, *active outdoor activities*, *family fun/children's activities*, and *history/culture activities* than are those visitors traveling without children.
- *History/culture activities*, *active outdoor activities*, and *touring/sightseeing activities* are all more popular among overnight visitors staying in paid accommodations and first-time visitors.



Most 2015 Maine summer day visitors were interested in exploring Maine's various *food/beverage/culinary* options or doing some *shopping*.

- Day visitors who are traveling with children are more likely to be interested in *shopping, water activities, active outdoor activities, and family fun/children's activities*.
- US residents are more likely to express interest in *food/beverage/culinary activities, touring/sightseeing, water activities, and family fun/children's activities*.

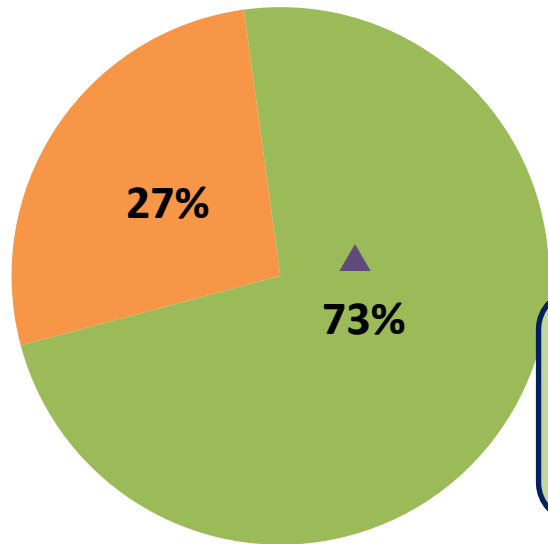
Travel Interest Areas of Maine Summer Day Visitors



Three-fourths of overnight summer visitors are staying in paid accommodations while in Maine, an increase over prior years.

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

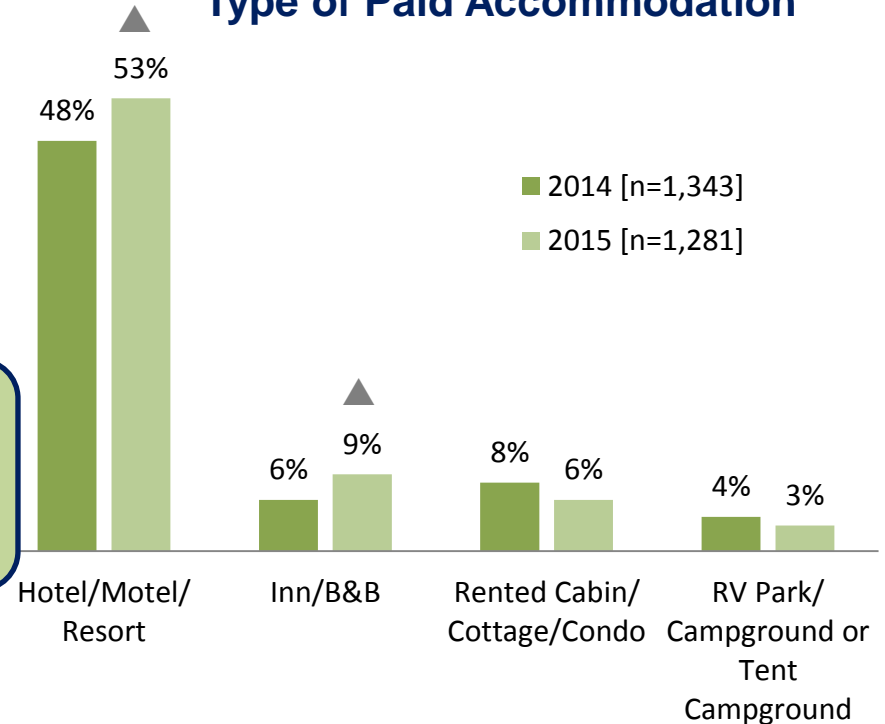
Type of Accommodation
[n=1,281]



Unpaid Accommodations Paid Accommodations

Canadians and first-time visitors are more likely to stay in paid accommodations.

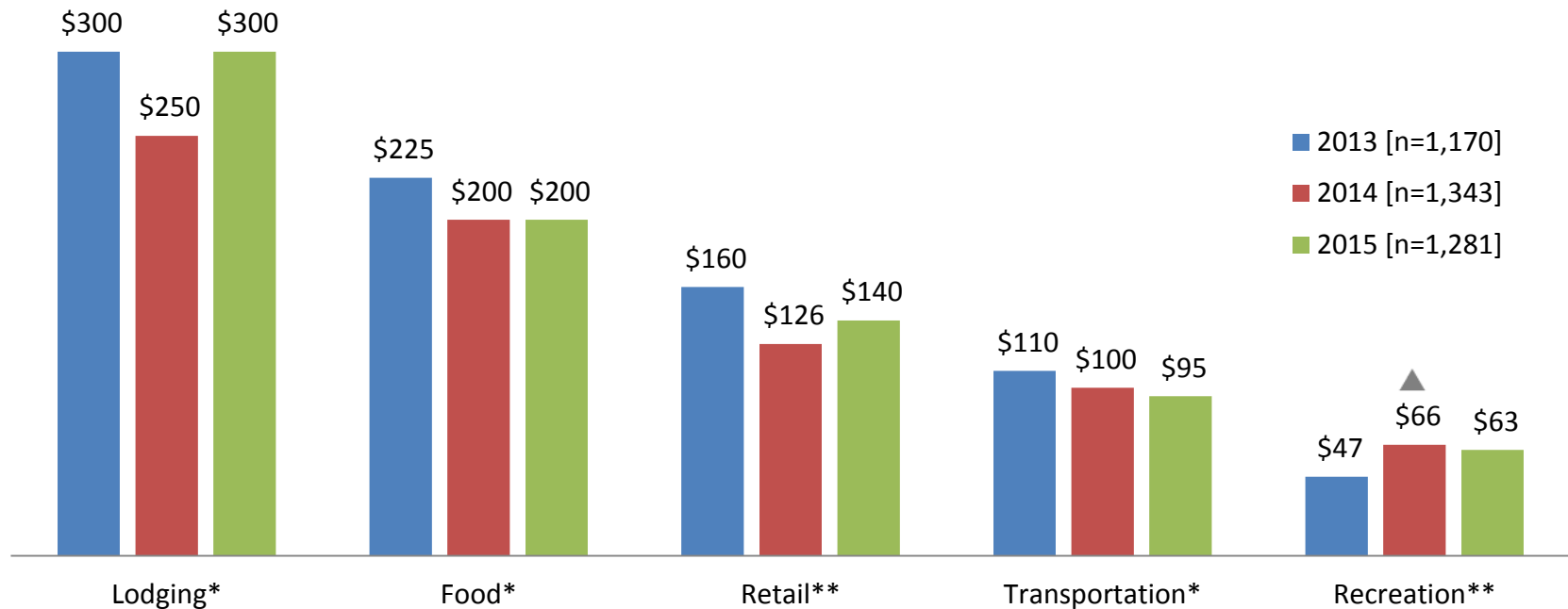
Type of Paid Accommodation



Average Length of Stay: 3.6 Nights

Lodging and food expenditures continue to make up the greatest share of expenditures for summer overnight visitors.

Average Spending per Travel Party – Overnight Visitors



*Median Expenditures

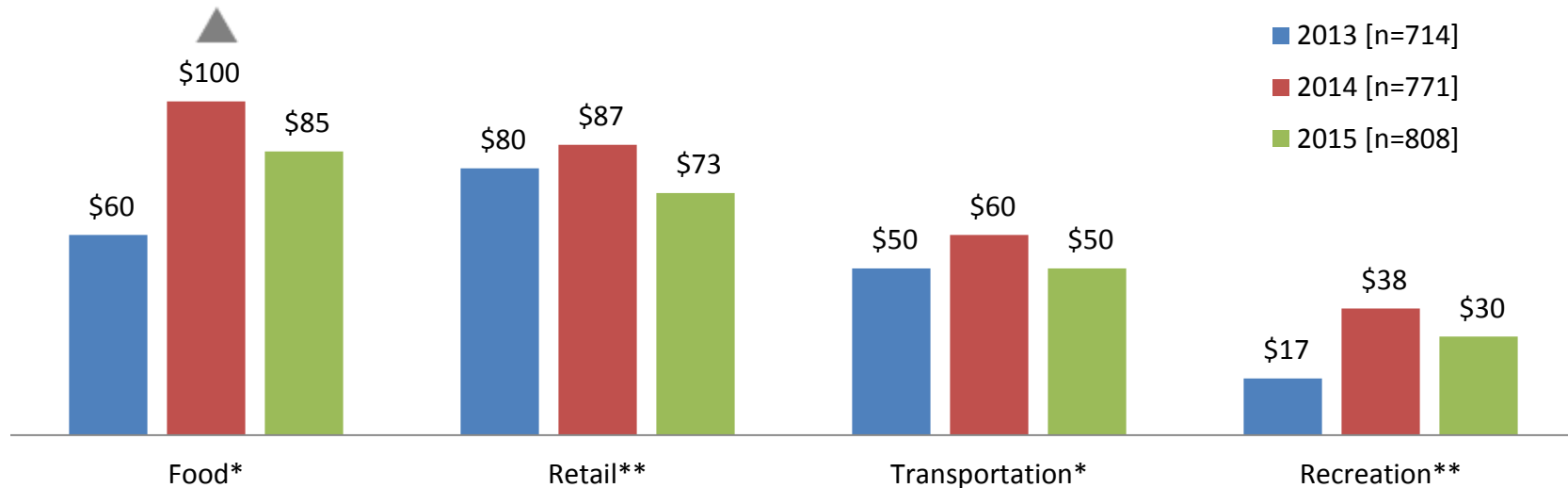
**Mean Expenditures. The 2014 questionnaire included additional examples of Retail and Recreation expenditure items that weren't included in prior versions of the questionnaire. Comparisons to prior years must be done cautiously.

Overnight Q32. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

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

Day visitors spent the most on food and retail expenditures while in Maine.

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.

Day Q26. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

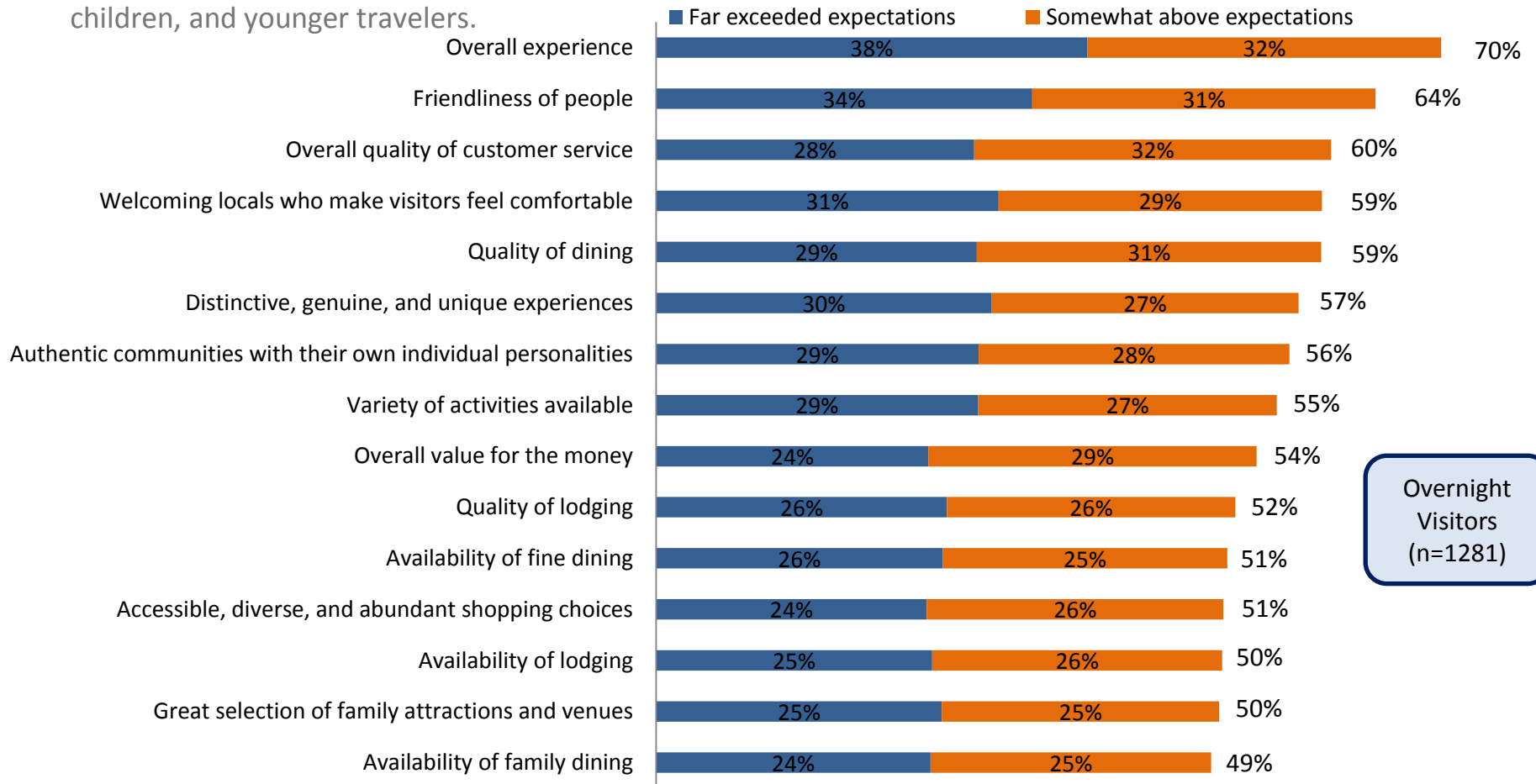
▲▼ notes significant difference between the current and prior year at the 95% confidence level

Trip Evaluation



More than two-thirds of summer overnight visitors found their overall experience visiting Maine to have exceeded their expectations.

- Several sub-groups of overnight visitors are more likely to report that their trip to Maine exceeded their expectations on a number of attributes: first-time visitors, those staying in paid accommodations, US residents (especially those from outside New England), visitors traveling with children, and younger travelers.



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.

Visitor satisfaction appears significantly higher this summer (2015) 2015 Summer Season Topline than reported for the prior summer (2014), a similar pattern as seen when comparing the Winter 2015 season with the Winter 2014 season.

- In all but one category, a higher proportion of summer overnight visitors this year indicated that Maine had exceeded their expectations, as compared to the prior year.

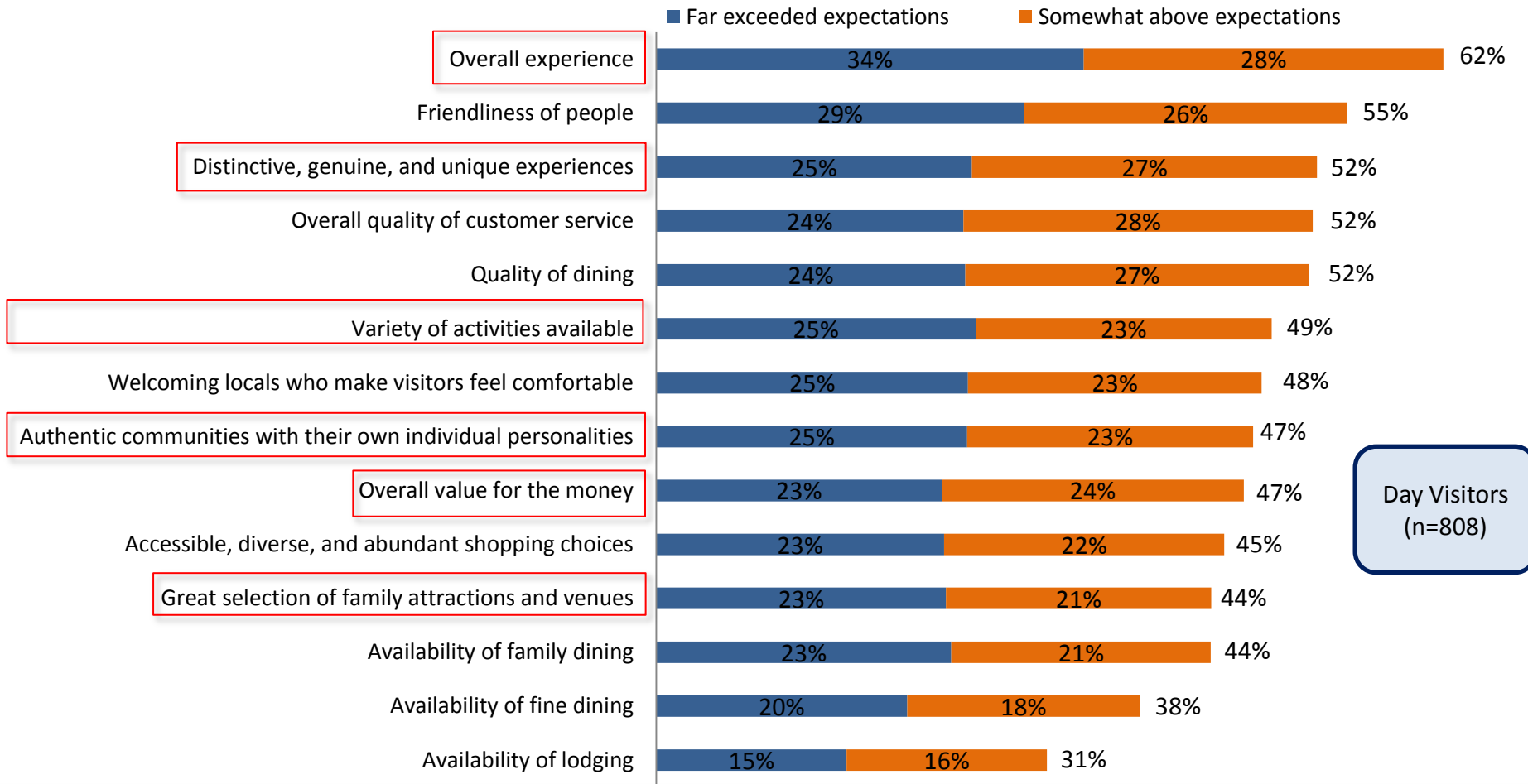
	Top 2 Box 2014 (n=1,343)	Top 2 Box 2015 (n=1,281)
Overall experience	63%	70% ▲
Friendliness of people	59%	64% ▲
Overall quality of customer service	52%	60% ▲
Welcoming locals who make visitors feel comfortable	52%	59% ▲
Quality of dining	50%	59% ▲
Distinctive, genuine, unique experiences	50%	57% ▲
Authentic communities with their own individual personalities	47%	56% ▲
Variety of activities available	47%	55% ▲
Overall value for the money	46%	54% ▲
Quality of lodging	48%	52%
Accessible, diverse, abundant shopping choices	43%	51% ▲
Availability of fine dining	40%	51% ▲
Availability of lodging	40%	50% ▲
Great selection of family attractions/ venues	43%	50% ▲
Availability of family dining	43%	49% ▲

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.

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

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).



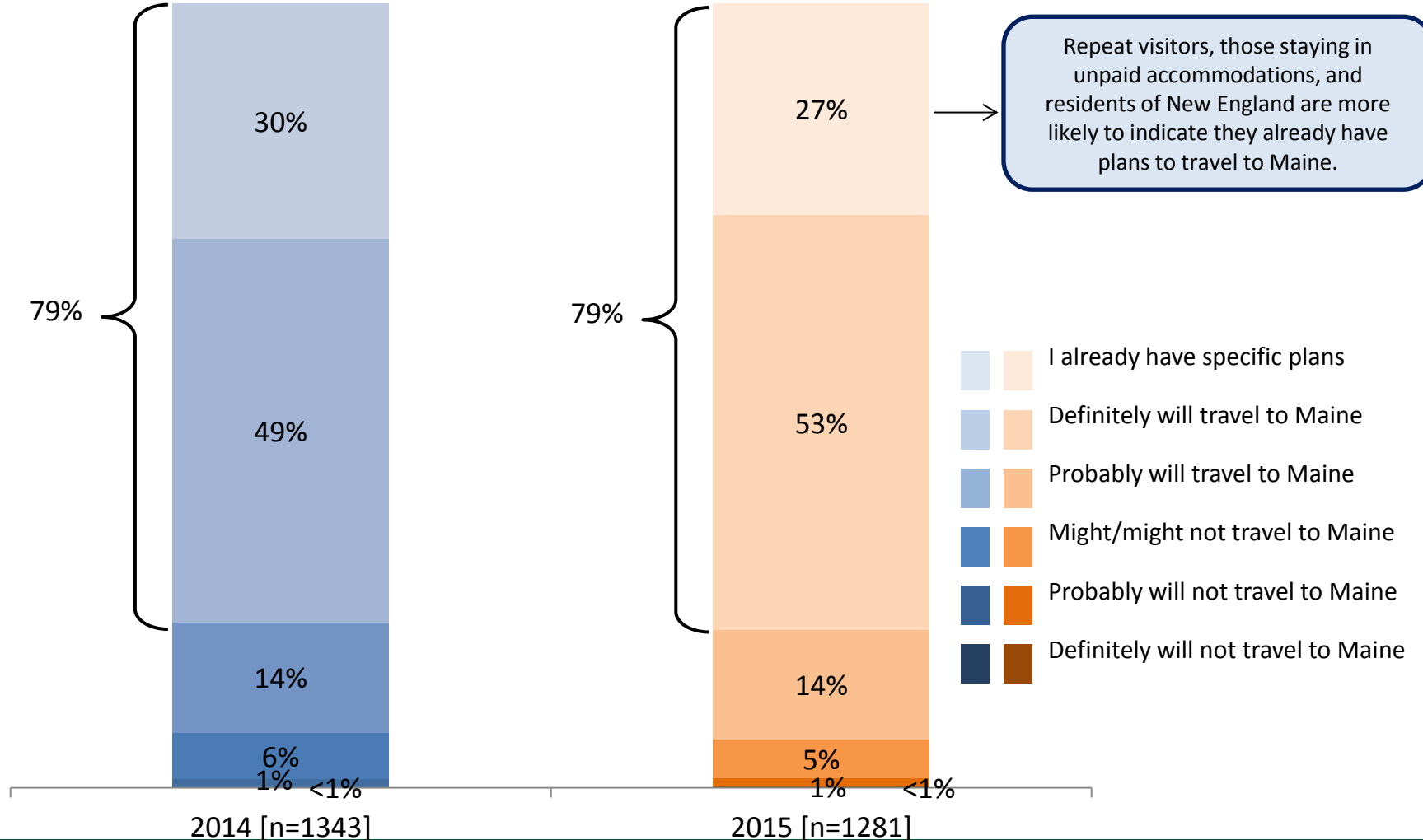
Day Q27: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

Future Travel



One-fourth 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

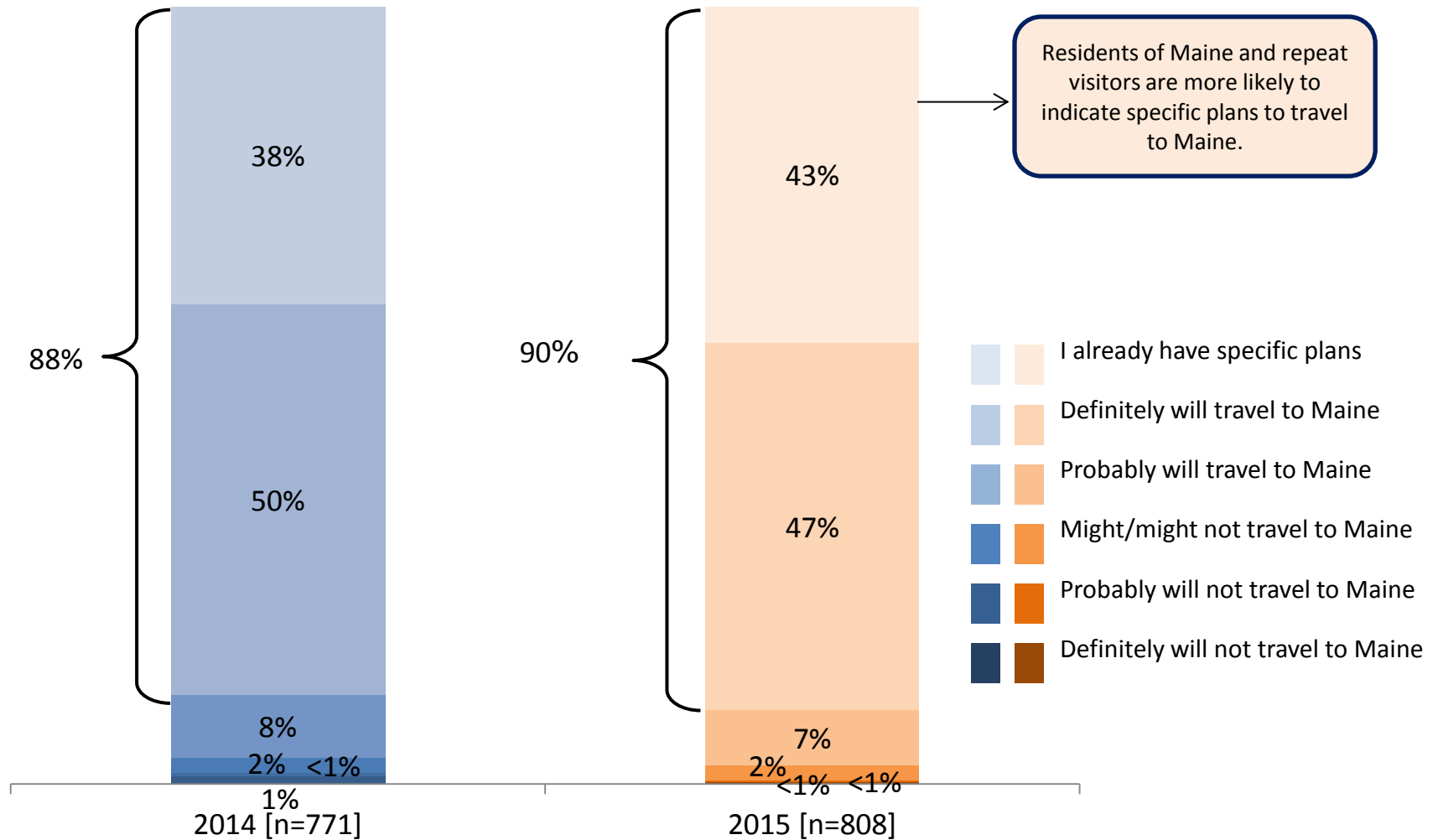


Overnight Q38. How likely will you be to travel in Maine in the next two years?

▲ ▼ notes significant difference between the current and prior year 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.

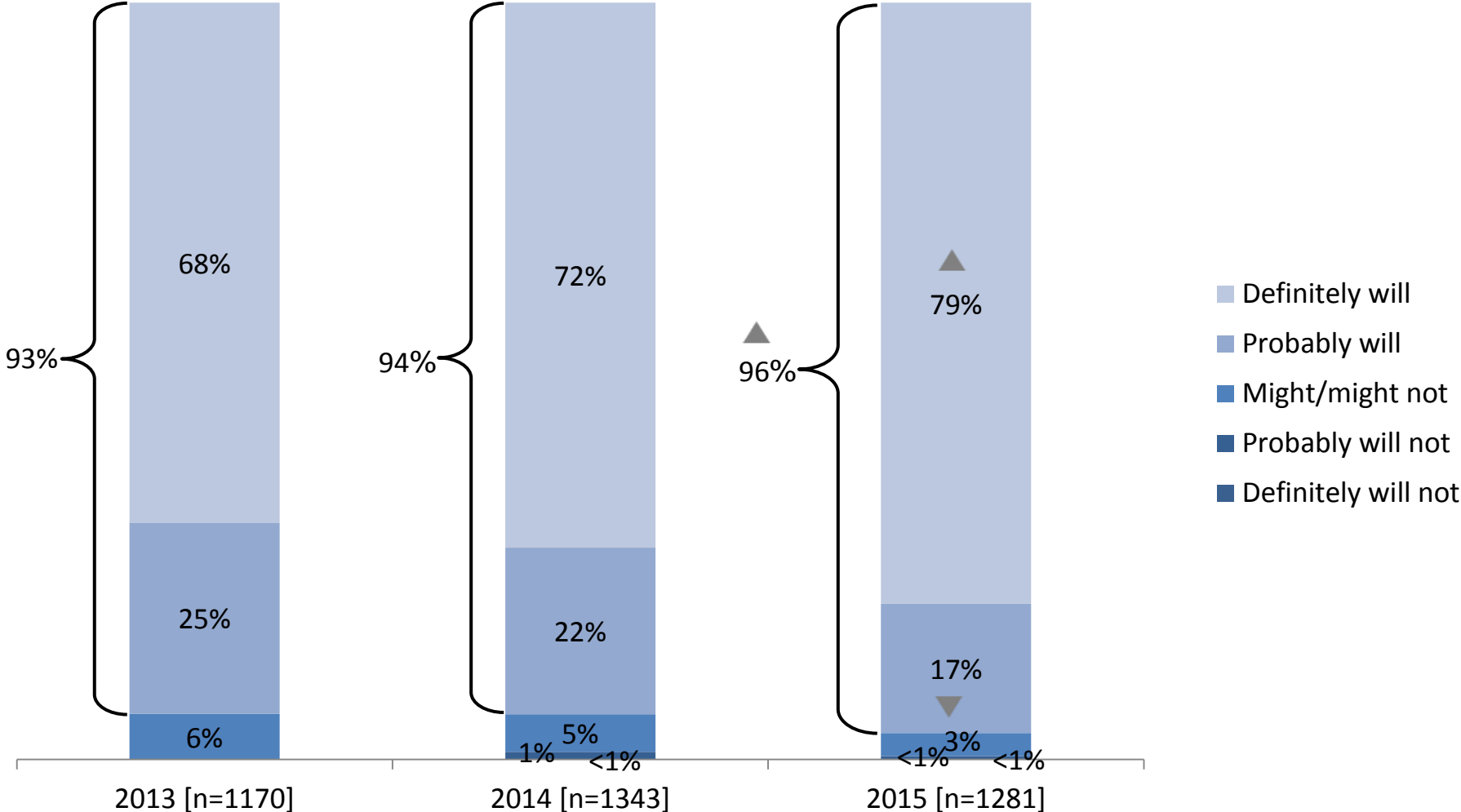
Likelihood of Trip to Maine in Next Two Years



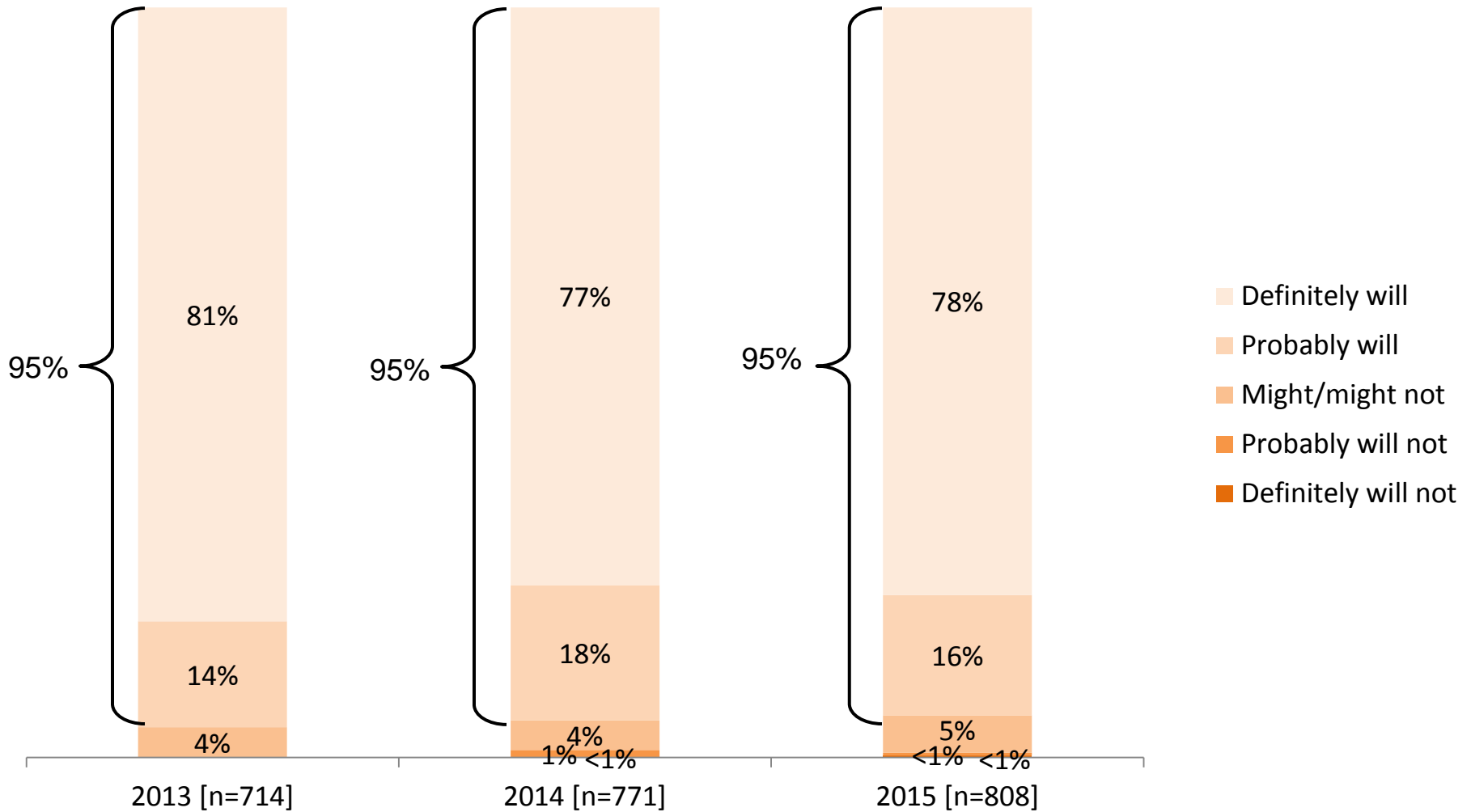
Day Q30. How likely will you be to travel in Maine in the next two years?

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

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



Day visitors are equally enthusiastic, with 95% 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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