



Maine Office of Tourism

Visitor Tracking Research

Fall 2018 Seasonal Topline

(September – November 2018)



Prepared by:



January 2019

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Executive Summary

2018 Fall Visitation Estimates

10.8 million travelers
visited Maine during
the Fall of 2018

6 million stayed
overnight

4.8 million visited for
the day

2018 Fall Visitor Profile

Average Age

Overnight Visitor – 40 yrs

Day Visitor – 43 yrs

First-Time Visitors

24% of Overnight Visitors

7% of Day Visitors

Overnight Visitor Origin

49% New England

34% Mid-Atlantic

17% Canada

Day Visitor Origin

91% U.S. (primarily MA & ME)

9% Canada

2018 Fall Trip Profile

Top Visitor Interest Areas

Food/Beverage/Culinary

Shopping

Touring/Sightseeing

Top Regional Destination

Maine Beaches Region

Overnight Visitors

70% stayed in paid accommodations

Average length of stay was 3.3 nights

2018 Fall Visitor Satisfaction

Aspects of Trip Greatly Exceeding Visitor Expectations

Overall experience
Friendliness of the people
Welcoming locals

Intend to Visit in Next Two Years

76% of overnight visitors
85% of day visitors

Intend to Recommend Maine

93% of overnight visitors
93% of day visitors

Day Trips Convert to Overnight

60% of day visitors likely to visit
Maine in the next two years say
they will “definitely stay
overnight” on their next visit.

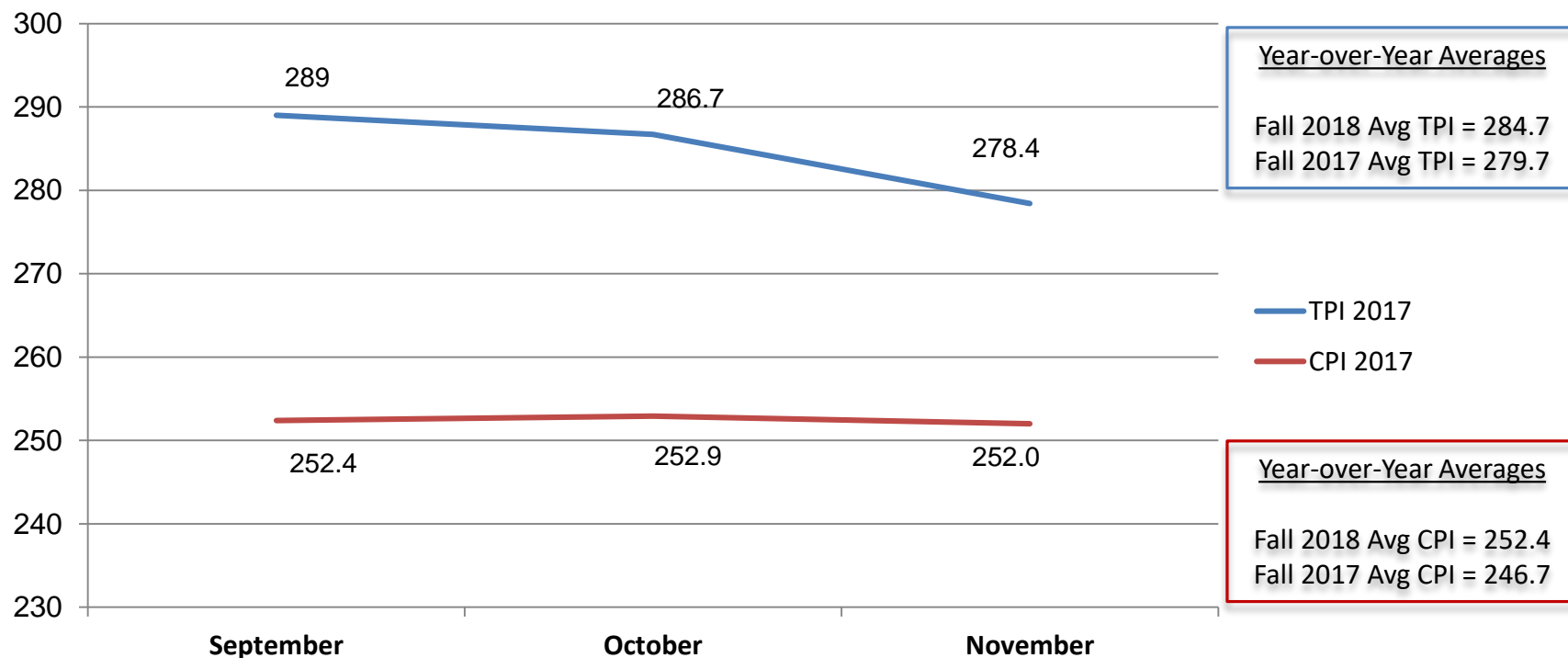
2018 Fall Season Travel Context

Note: Due to the U.S. Government shutdown which began on December 22, 2018, Fall Season weather data (provided by NOAA, U.S. Department of Commerce) is not available at this time. When the shutdown has ended and NOAA is providing data once again, weather data will be added and a revised report will be issued.

The cost to travel (Travel Price Index) remains higher than the cost of consumer goods and services overall (Consumer Price Index).

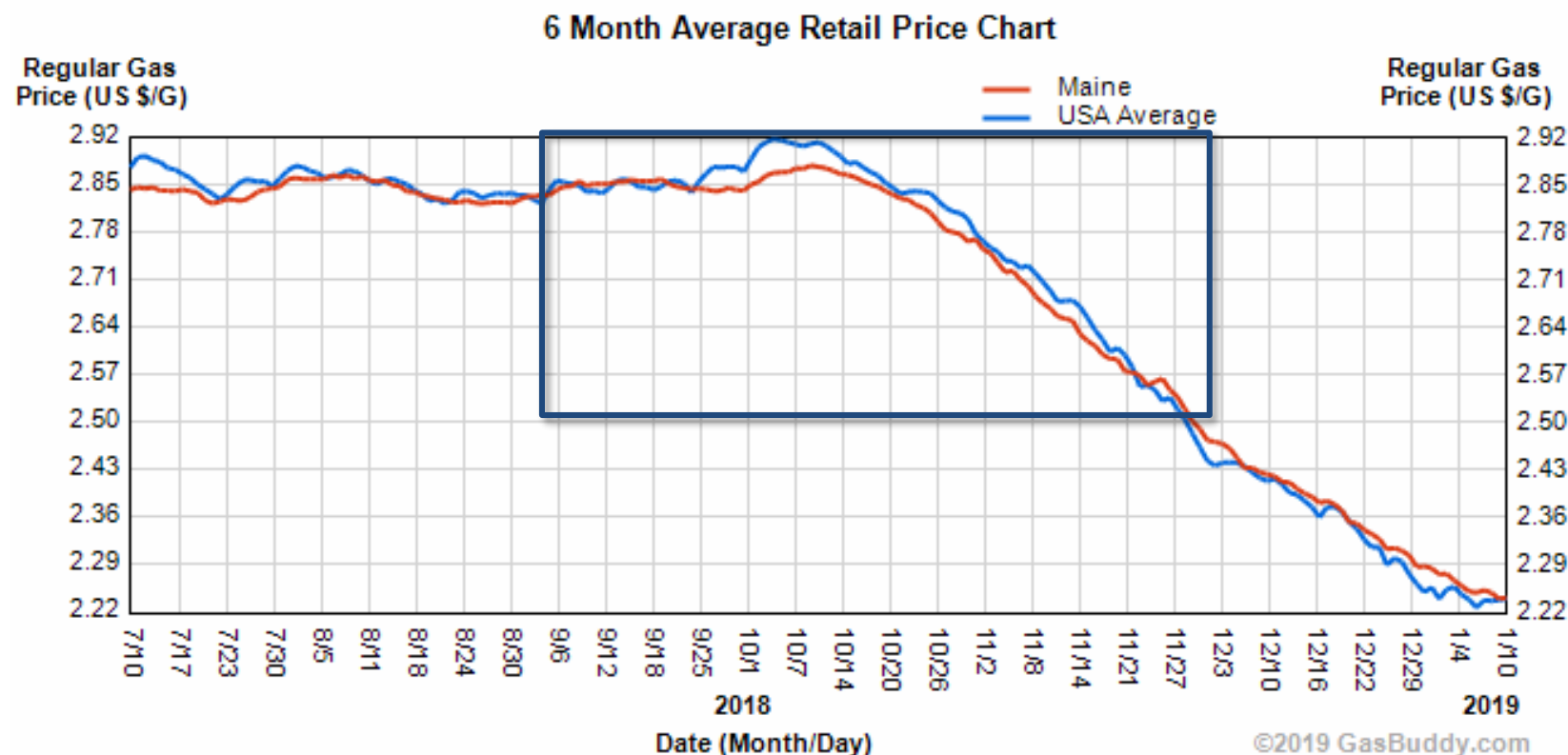
- Similar to the Fall of 2017, the Travel Price Index dropped between September and November 2018.
- The Fall Season overall, however, showed a year-over-year increase in both the average TPI and CPI, as compared to the Fall 2017 average.

Consumer Price Index and Travel Price Index, 2018

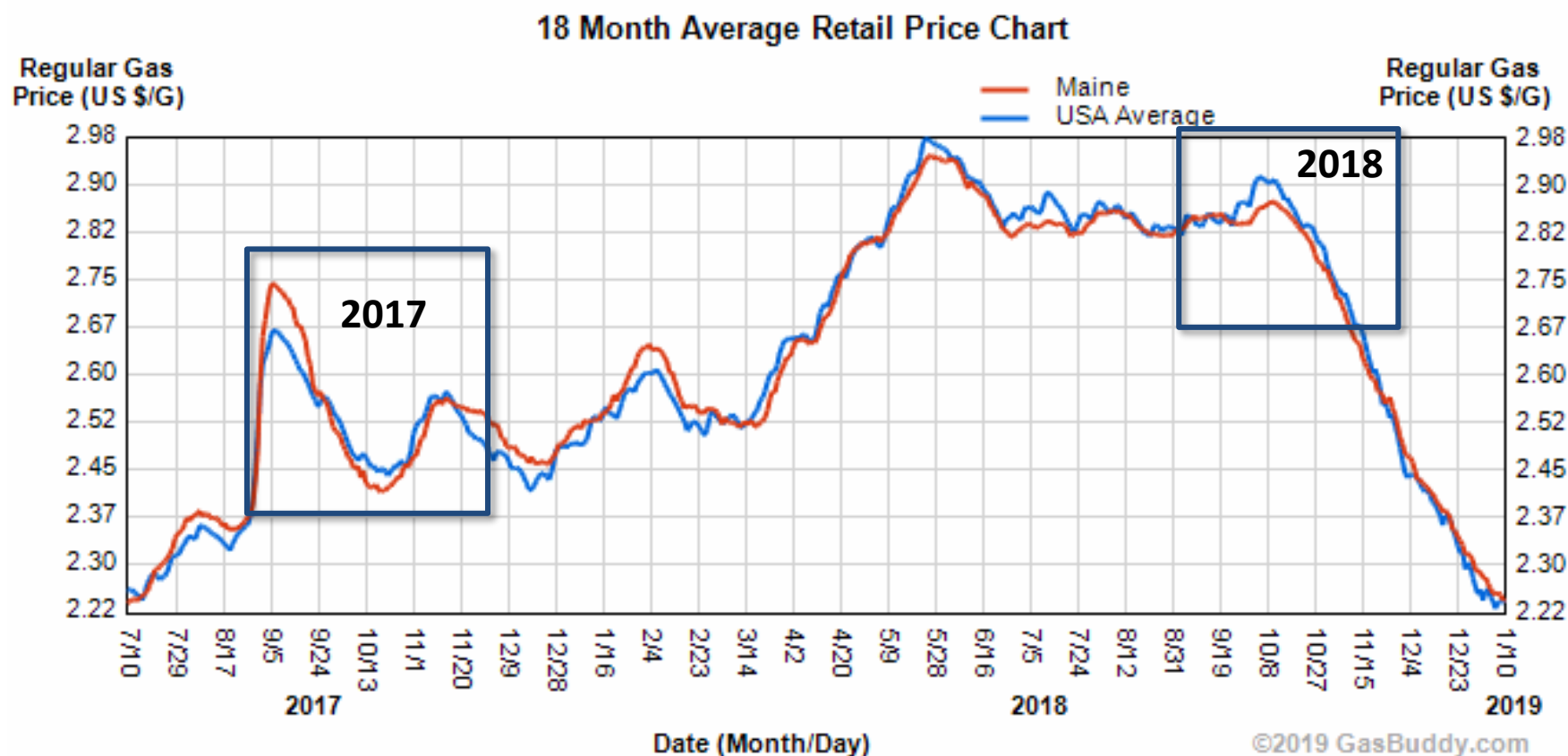


Data Sources: CPI figures are from the U.S. Bureau of Labor Statistics. TPI figures are from the U.S. Travel Association.

Gas was less expensive in Maine than in the U.S. overall during most of the Fall season and dropped steadily during the second half of the season.

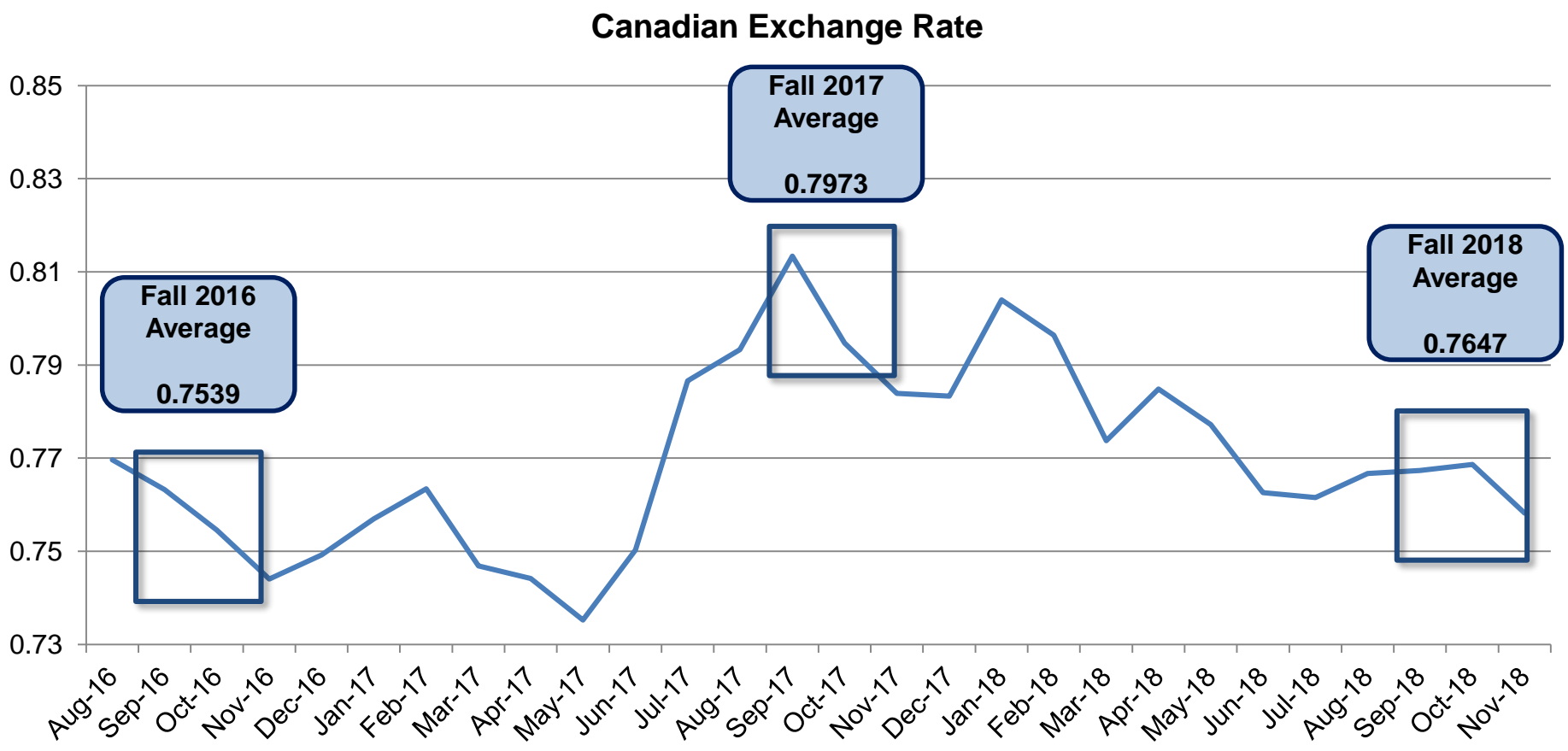


The 2018 Fall season was characterized by higher gas prices in Maine and nationwide, compared to the 2017 Fall season.

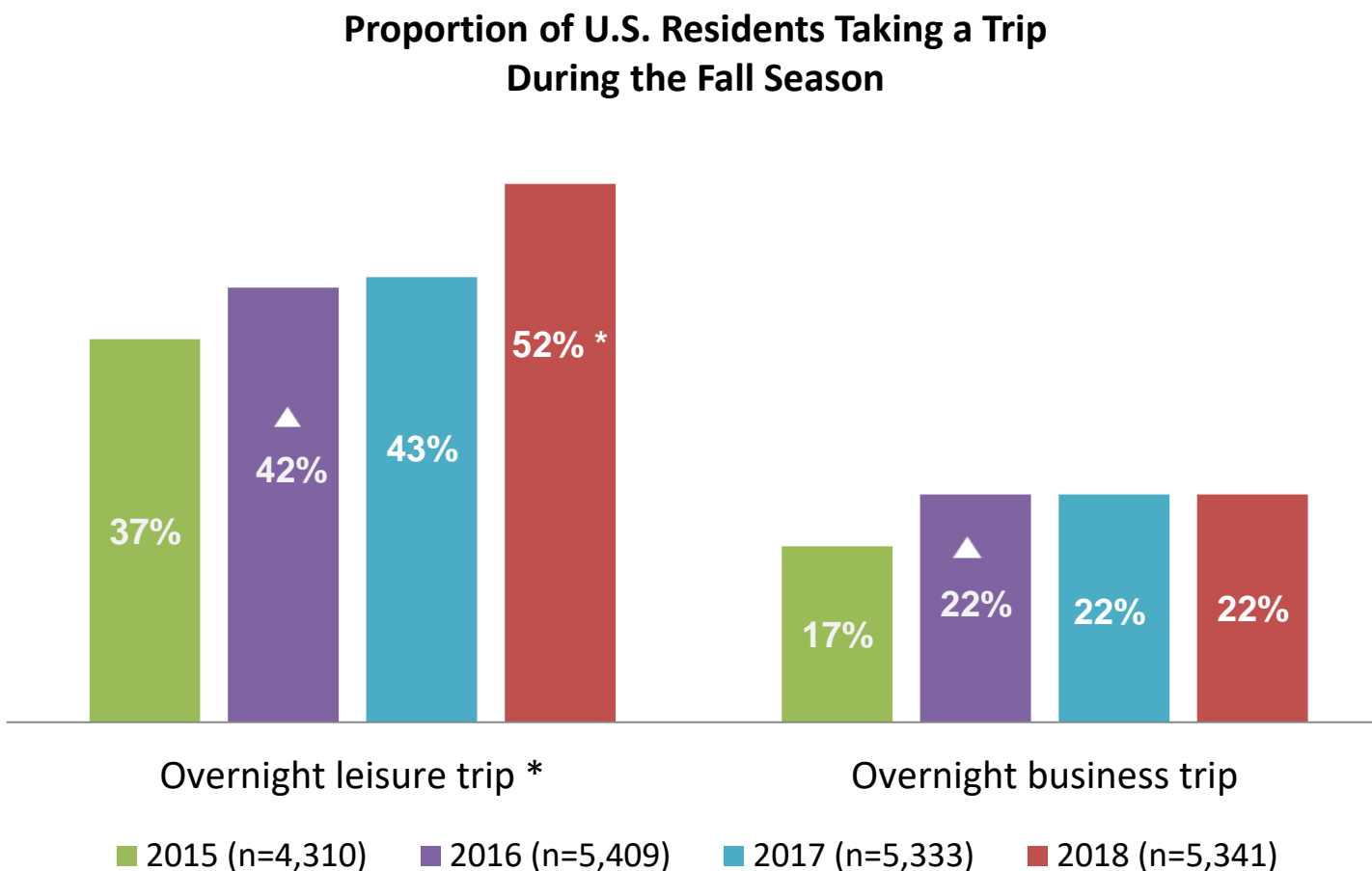


After experiencing a modest increase in the Fall of 2017, the Canadian exchange rate dropped again, once again making it relatively more expensive for Canadians to visit Maine.

2018 Fall Season
(Sep – Nov 2018)



During the Fall of 2018, half of U.S. residents took an overnight leisure trip and one-fifth took a business trip.



*** In 2018, data collection was modified to measure only leisure travel and business travel, eliminating the separate category of VFR travel. Therefore, leisure travel proportions are not directly comparable to prior years' data, as they now include VFR travel.**

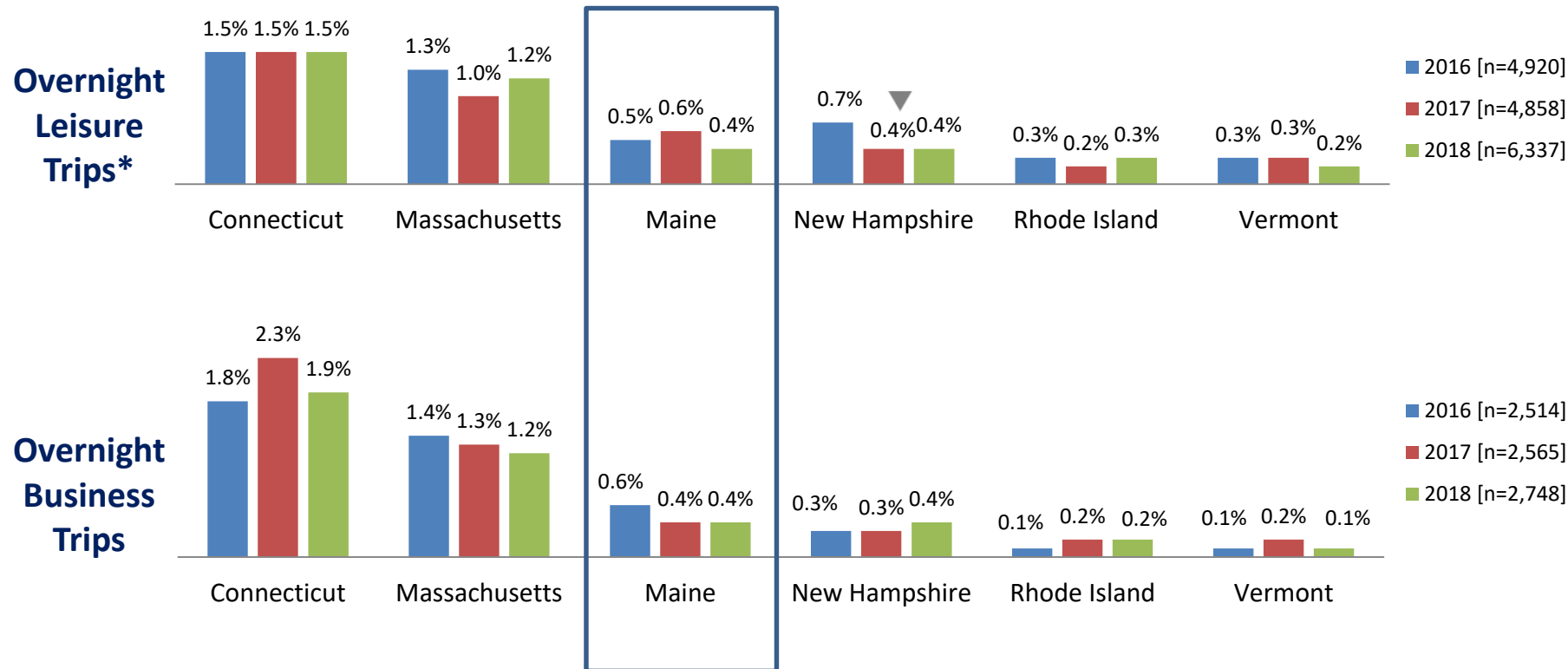
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

▲ ▼ notes significant difference between years at the 95% confidence level

Maine's share of the overnight leisure travel market has held steady at about 0.5%.

2018 Fall Season
(Sep – Nov 2018)

Share of Total Trips Taken by U.S. Residents



* In 2018, data collection was modified to measure only leisure travel and business travel, eliminating the separate category of VFR travel. Therefore, leisure travel proportions are not directly comparable to prior years' data, as they now include VFR travel.

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, 2015, and 2017 at the 95% confidence level

2018 Fall Season Highlights

The Fall of 2018 brought substantial year-over-year growth in day visitation.

- This increase in day visitation was coupled with a drop in overnight visitation, resulting in modest gains in overall visitation to Maine during the Fall 2018 season.

Visitation Estimates*

Visitation Estimates*	Fall 2017	Fall 2018	% Chg
Total Estimated Visitation	10.7 million	10.8 million	+ 1.1%
<i>Overnight Visitors</i>	<i>6.3 million</i>	<i>6.0 million</i>	<i>- 5.5%</i>
<i>Day Visitors</i>	<i>4.4 million</i>	<i>4.8 million</i>	<i>+ 10.8%</i>

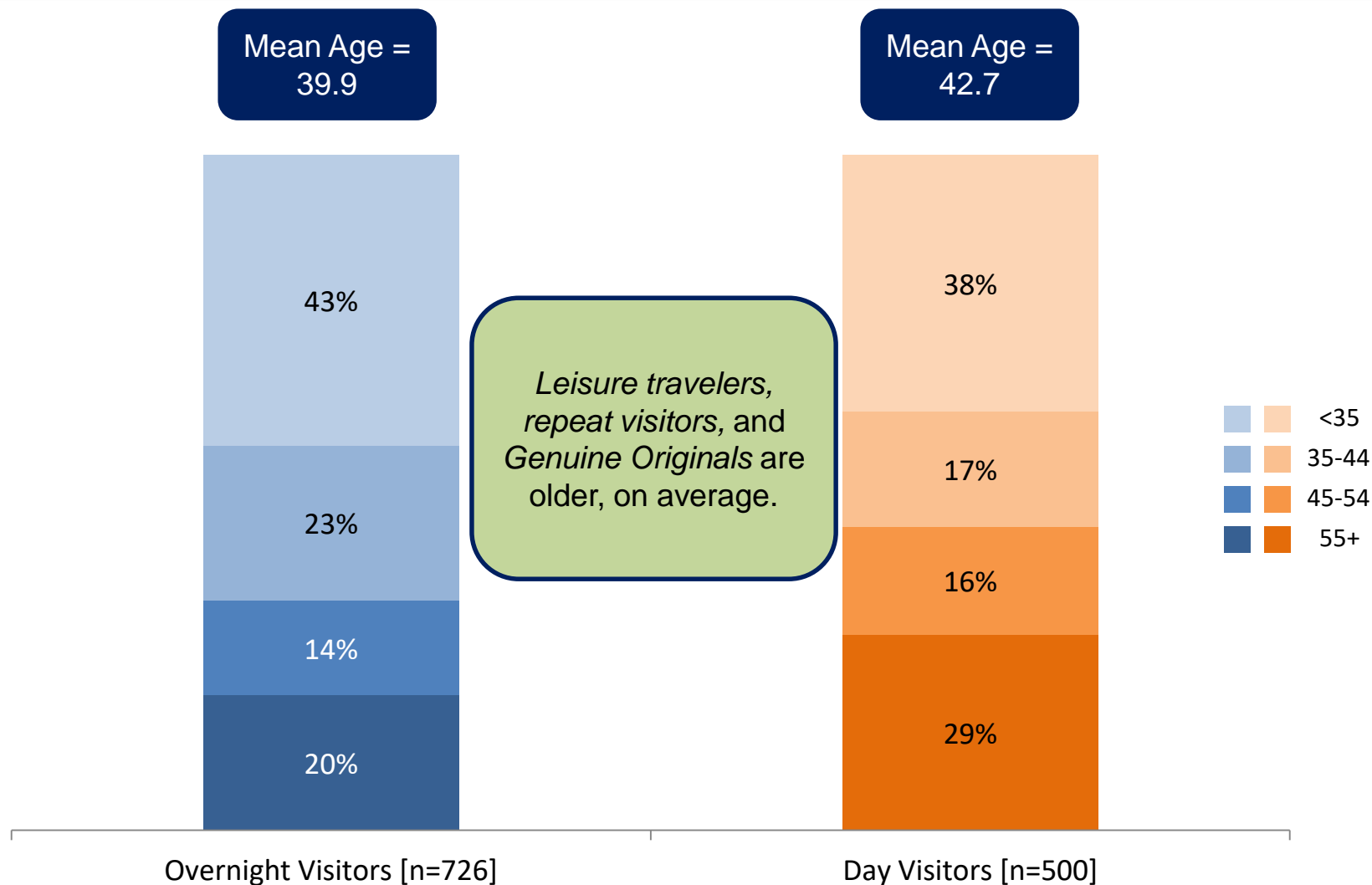
**For the purposes of visitation estimates, only visitors on tourism-related trips are included.*

Tourism-related trips include:

- All leisure trips EXCEPT those for a funeral, family reunion, or class reunion.*
- Business trips that are for a convention/conference/trade show or training/professional development.*

Note: Visitation estimates provided here are preliminary and reflect visitation from September through November 2018. Adjustments will be made to these estimates at the end of the year for the Annual Report, to account for seasonal fluctuations.

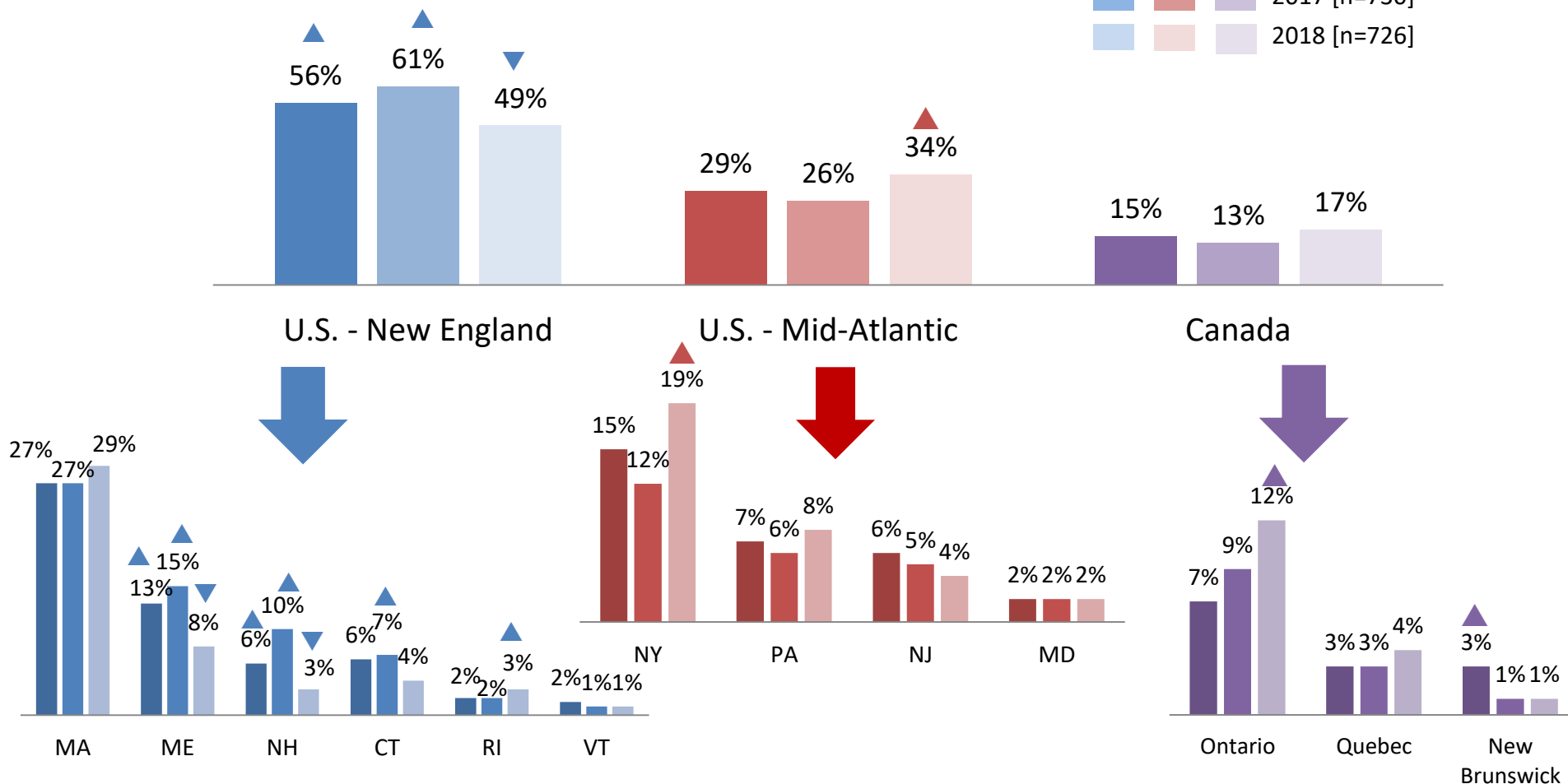
The typical Fall visitor to Maine is around 40 years old.



Half of Maine's overnight visitors during the 2018 Fall season came from New England, and one-third came from the Mid-Atlantic.

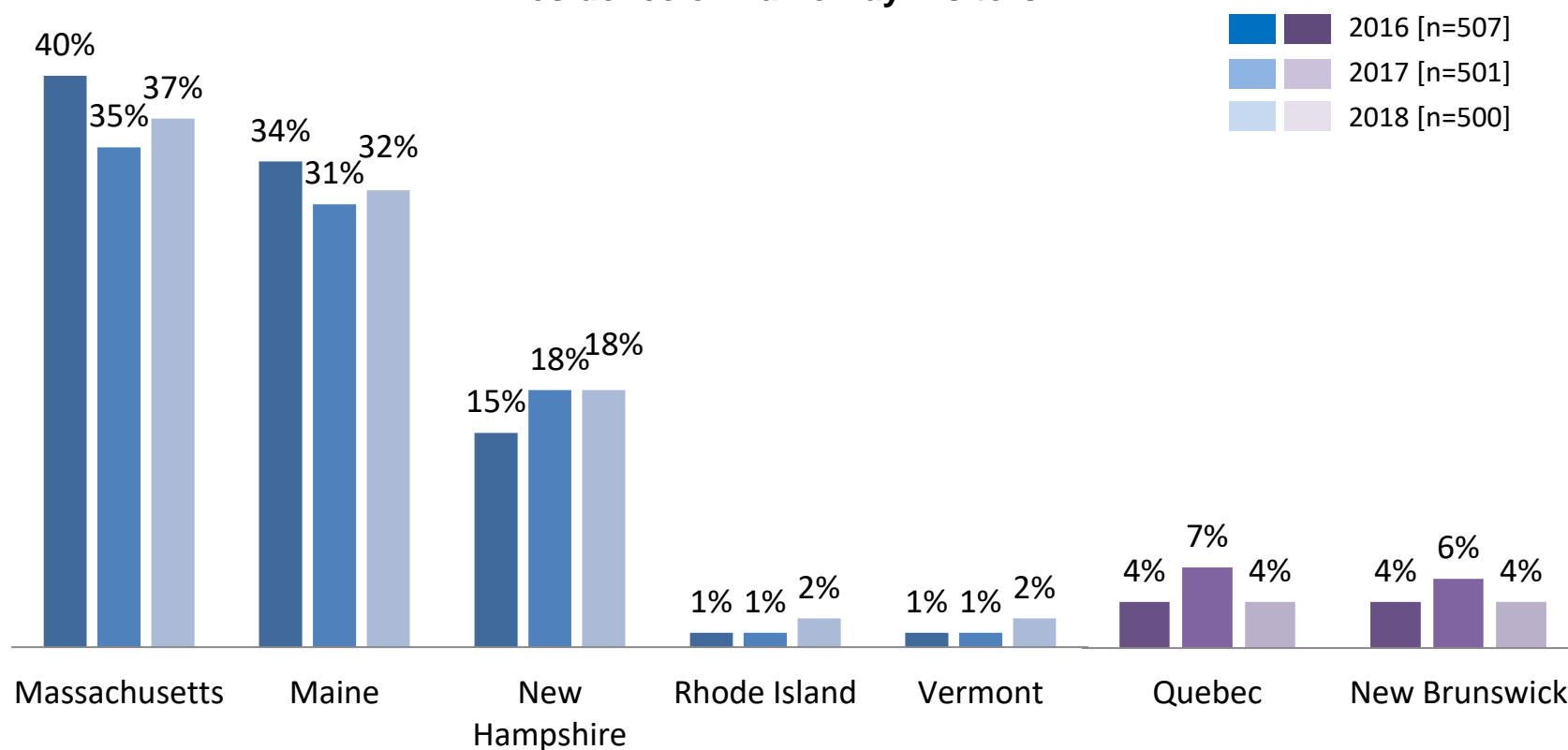
Residence of Maine Overnight Visitors

■ 2016 [n=712]
■ 2017 [n=730]
■ 2018 [n=726]



Massachusetts and Maine continue to account for the greatest proportions of Fall day visitors to Maine.

Residence of Maine Day Visitors

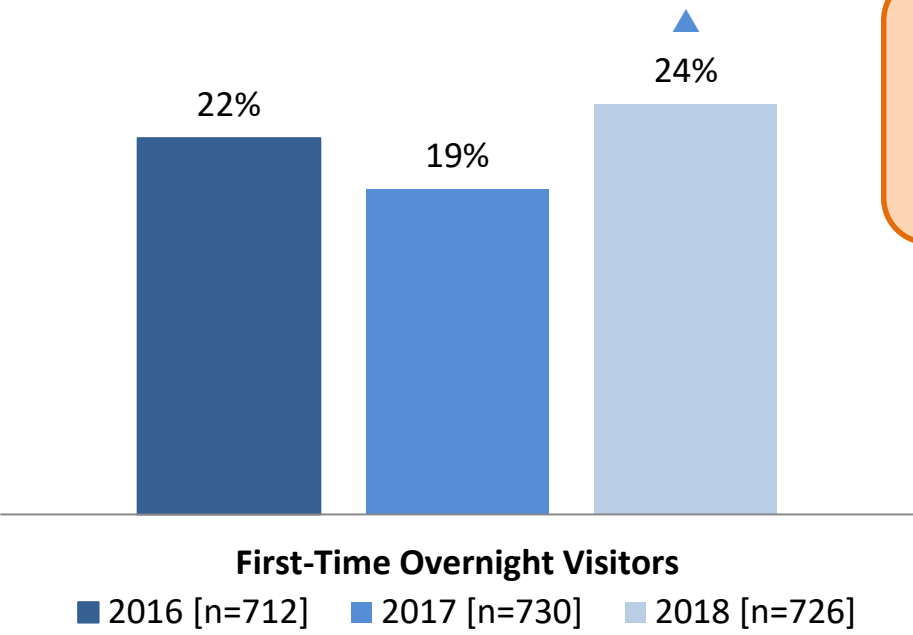


First-time visitors comprise one-fourth of Maine’s overnight visitors during the Fall of 2018, a greater proportion than during the Fall 2017 season.

2018 Fall Season
(Sep – Nov 2018)

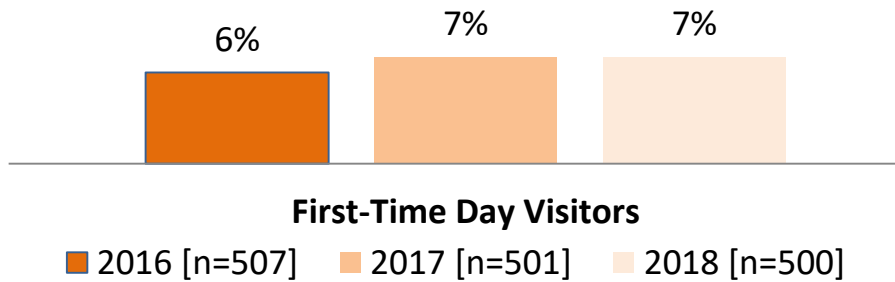
First-Time Overnight Visitors (Compared to Repeat Visitors):

- More likely to be from outside New England (38% vs. 9% of New England residents)
- More likely to stay in paid accommodations (27% vs. 17% of those staying in unpaid)
- More likely to be business travelers (35% vs. 21% of leisure travelers)



First-Time Day Visitors (Compared to Repeat Visitors):

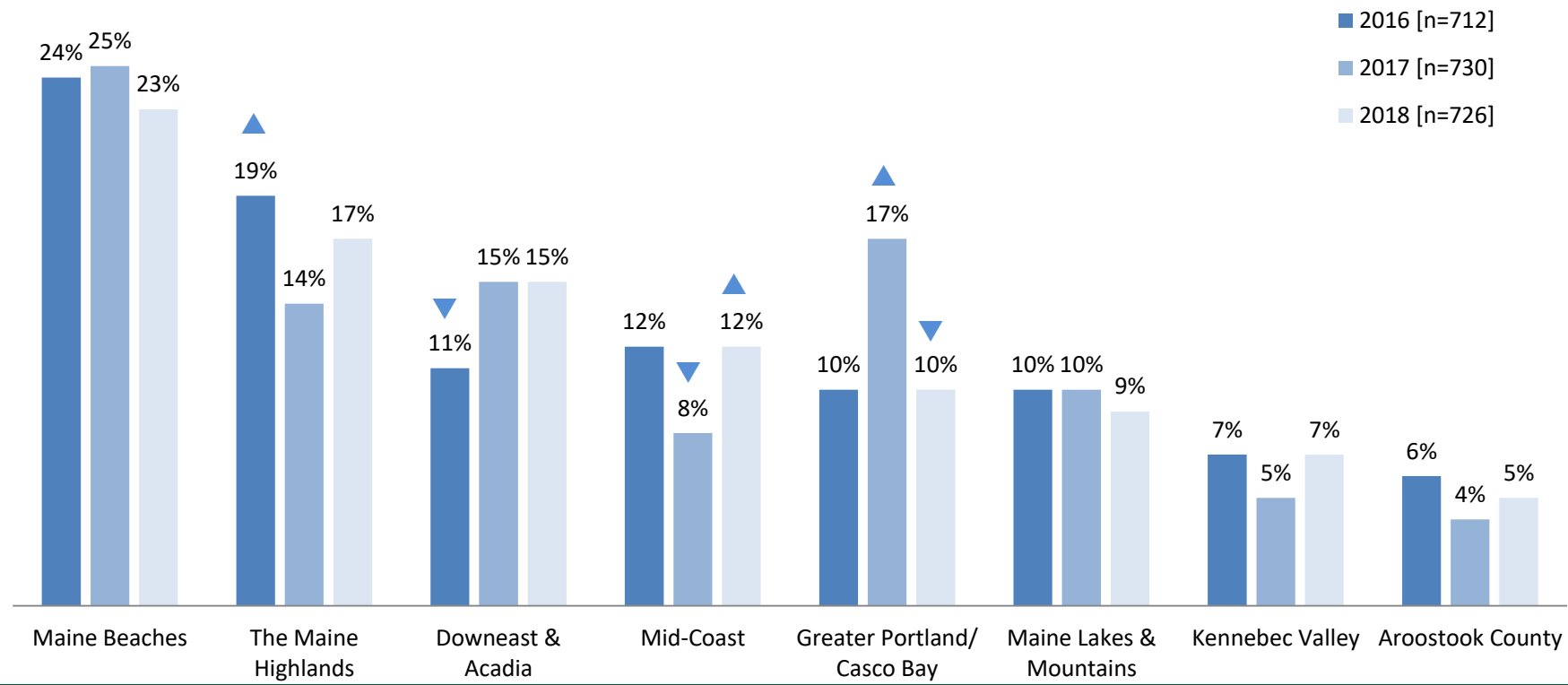
- More likely to be from Canada (25% vs. 6% of Americans)
- Younger (11% of those <45 vs. 3% of those 45+)



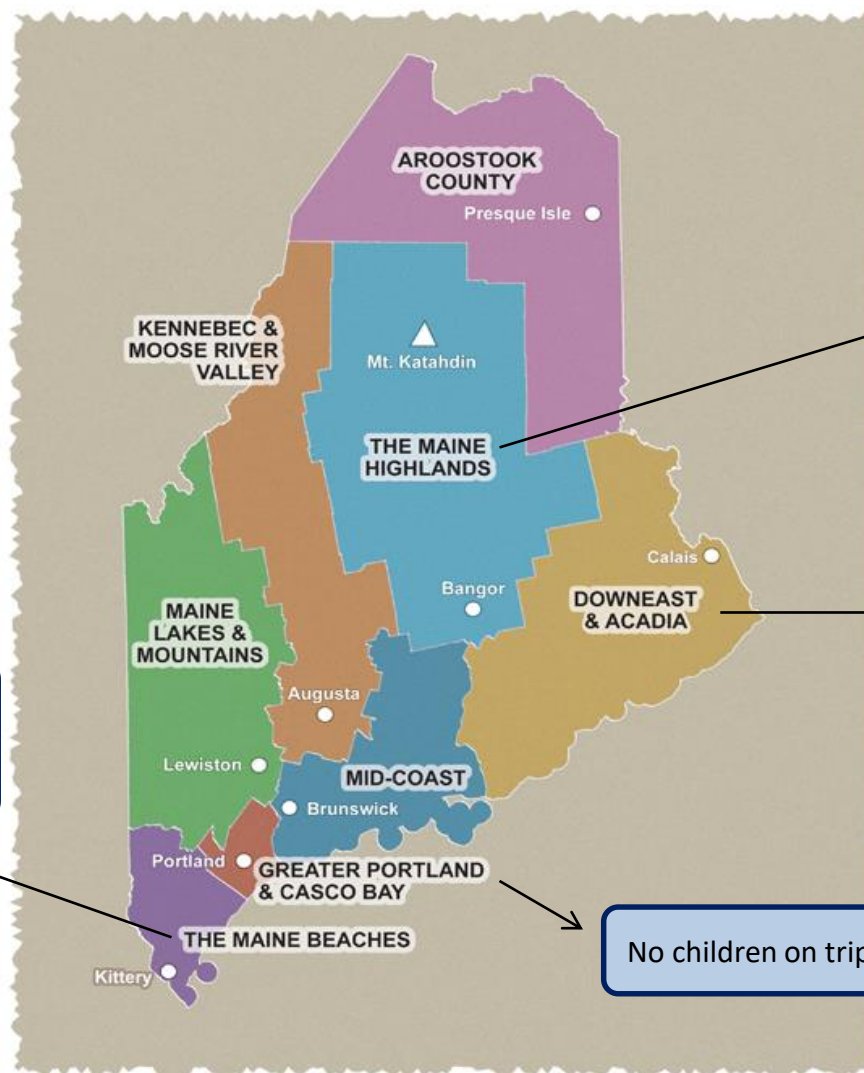
One-fourth of Maine’s overnight visitors during the Fall of 2018 told us the *Maine Beaches* region was their primary destination.

- Fall 2018 visitors were more likely to visit the *Mid-Coast* region and less likely to visit the *Greater Portland/Casco Bay* region, compared to Fall 2017 visitors.

Primary Destination of Maine Overnight Visitors

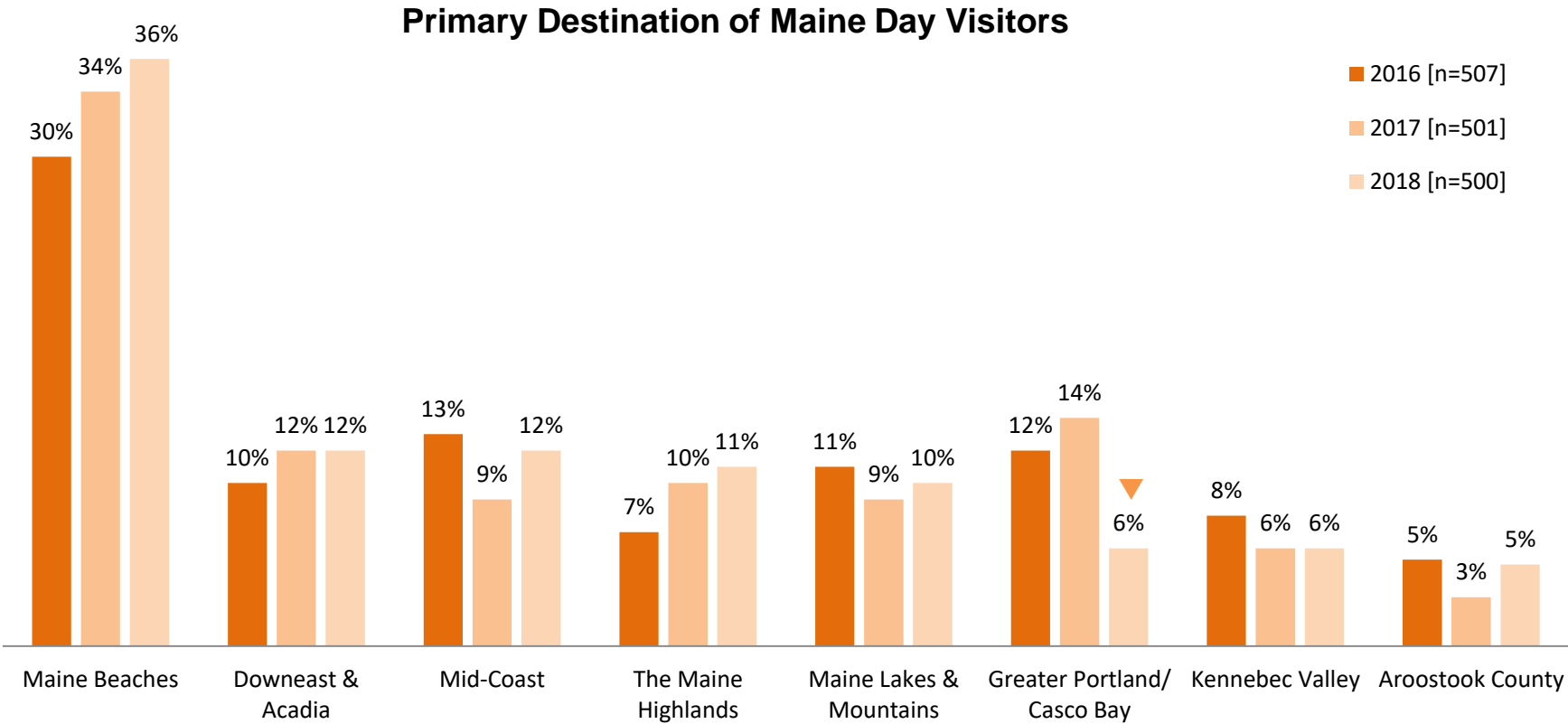


Certain demographic/psychographic sub-groups of Maine's overnight visitors have a stronger propensity to visit specific tourism regions.

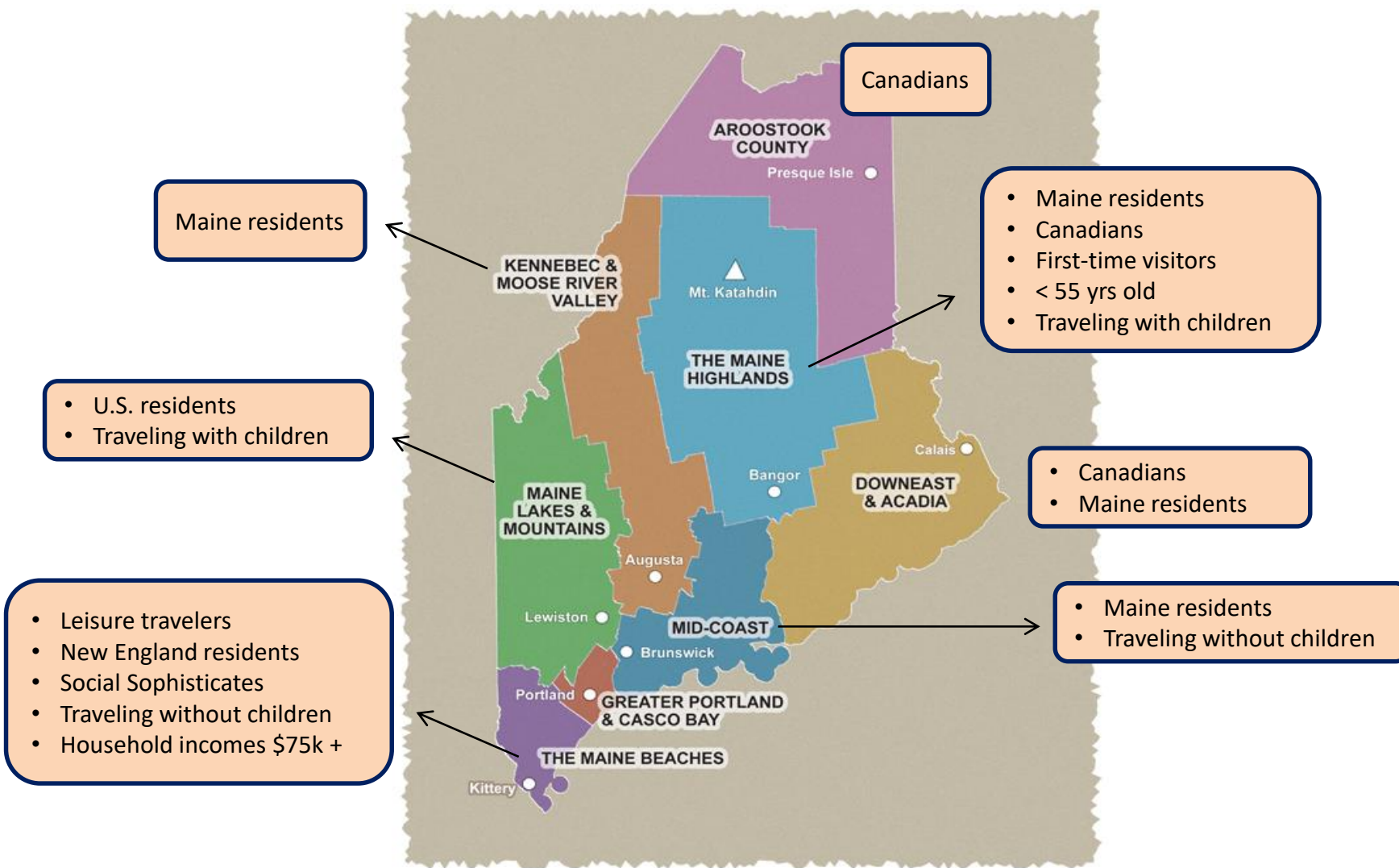


Overnight Q28. What region in Maine was your primary destination?

As in prior years, Fall day visitors were most likely to visit the Maine Beaches region.



Certain demographic/psychographic sub-groups of Maine's day visitors have a stronger propensity to visit specific tourism regions.



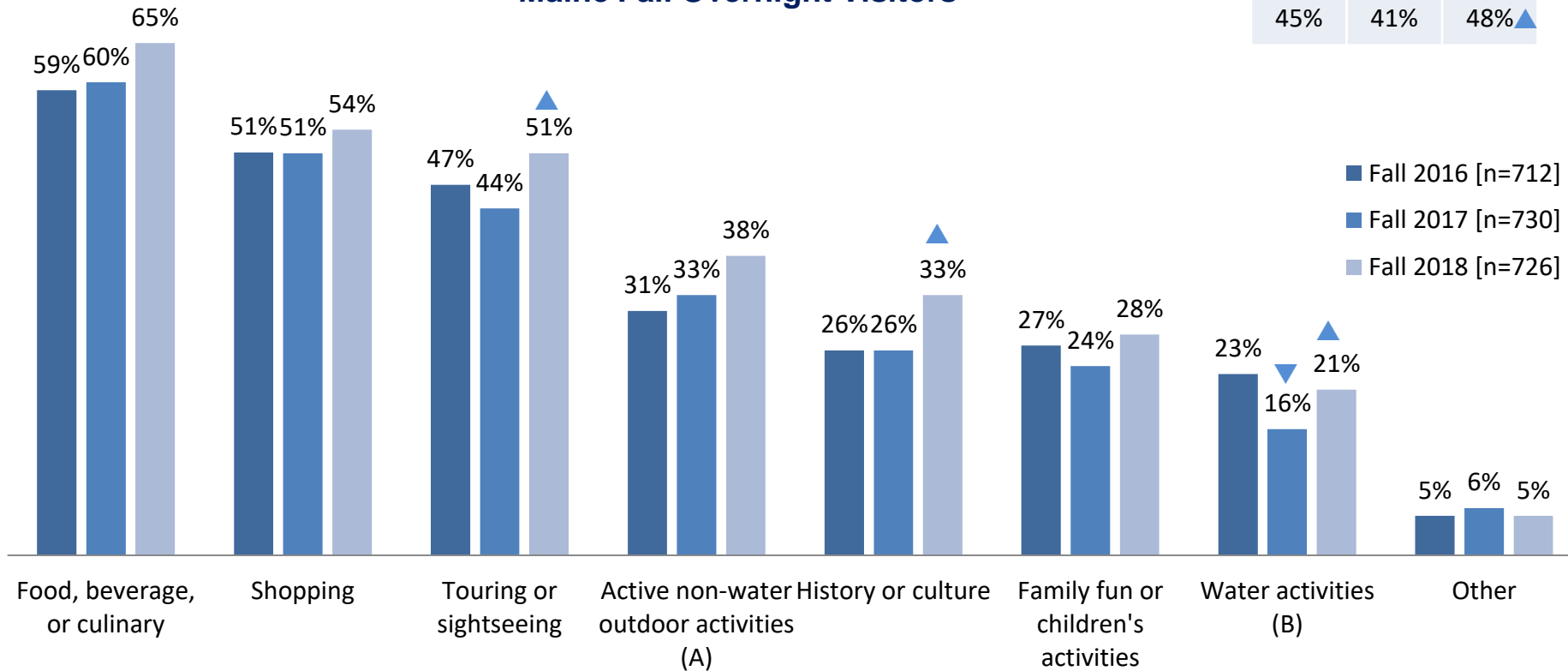
Day Q21. What region in Maine was your primary destination?

Most 2018 Fall overnight visitors were interested in exploring Maine's food/beverage/culinary options, shopping, or touring/sightseeing.

- The proportion of overnight visitors interested in *touring/sightseeing*, *active outdoor activities*, and *history/culture activities* is higher in 2018 than during the past Fall season.
- Net outdoor activities* (A + B below) nearly equals *touring/sightseeing* as an interest area.

Travel Interest Areas of
Maine Fall Overnight Visitors

NET OUTDOOR: (A) + (B)		
2016	2017	2018
45%	41%	48%▲



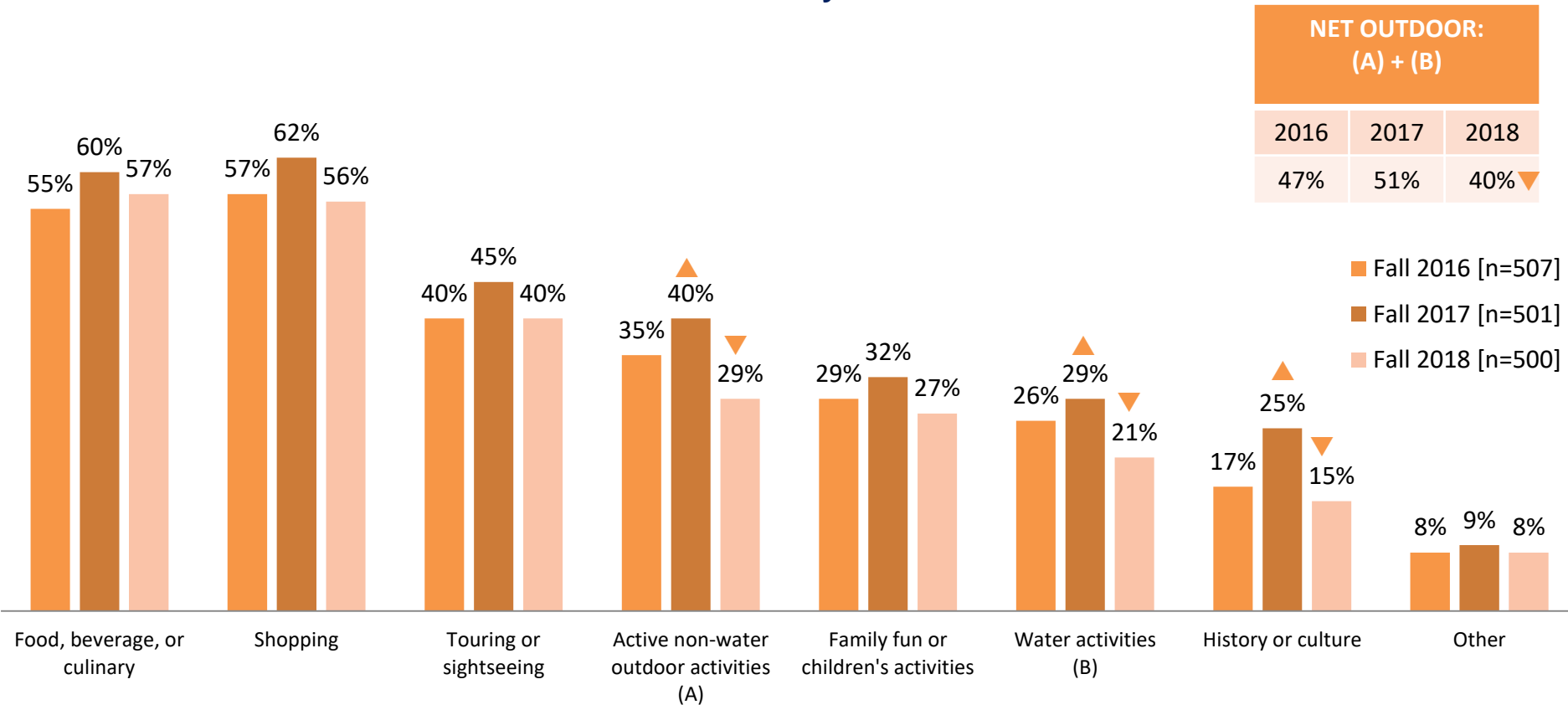
Certain sub-groups of overnight visitors demonstrated an affinity for specific interest areas. These are summarized below.

Interest Area	Sub-Groups of Overnight Visitors More Likely to be Interested
Food, beverage, culinary	U.S. residents (67% vs. 57%) Household incomes of \$150,000 or more (78% vs. 63%)
Shopping	Paid accommodations (56% vs. 46%)
Touring or sightseeing	Paid accommodations (54% vs. 42%)
Active outdoor activities (non-water)	U.S. residents (40% vs. 28%) Leisure travelers (40% vs. 31%) Traveling with children (46% vs. 35%)
History or culture	Business travelers (43% vs. 30%) Outside New England (39% vs. 28%)
Family fun or children's activities	Traveling with children (65% vs. 14%) Leisure travelers (30% vs. 21%) Unpaid accommodations (36% vs. 25%) Travelers under the age of 45 (32% vs. 19%) U.S. residents (30% vs. 21%)
Water activities	U.S. residents (23% vs. 13%)

Food/beverage/culinary interests and *shopping* and remain the most popular among day visitors during the Fall.

2018 Fall Season
(Sep – Nov 2018)

Travel Interest Areas of Maine Fall Day Visitors

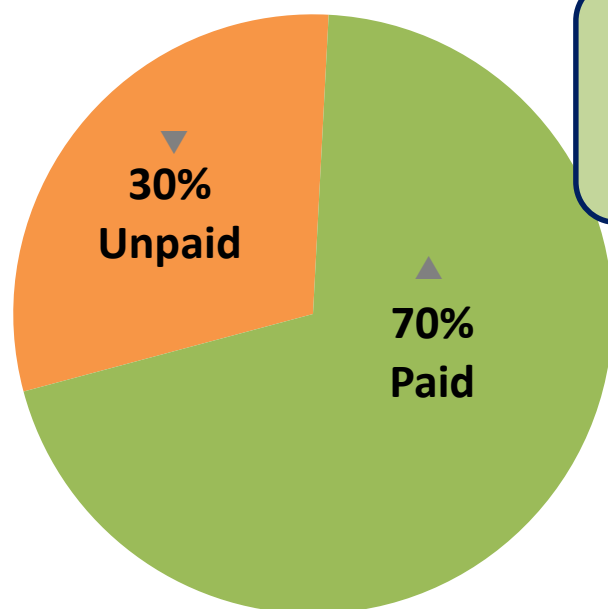


Certain sub-groups of day visitors demonstrated an affinity for specific interest areas. These are summarized below.

Interest Area	Sub-Groups of Day Visitors More Likely to be Interested
Food, beverage, culinary	New England residents (59% vs. 40%)
Shopping	Canadians (75% vs. 54%) Repeat visitors (58% vs. 48%)
Touring or sightseeing	New England residents (41% vs. 29%)
Active outdoor activities (non-water)	U.S. residents (30% vs. 20%) Travelers under the age of 35 (43% vs. 21%)
History or culture	Canadians (25% vs. 14%)
Family fun or children's activities	Traveling with children (62% vs. 12%) Travelers under the age of 55 (32% vs. 13%) U.S. residents (29% vs. 12%) Balanced Achievers (37% vs. 21%)
Water activities	Traveling with children (31% vs. 17%) U.S. residents (22% vs. 12%) Travelers under the age of 35 (31% vs. 16%)

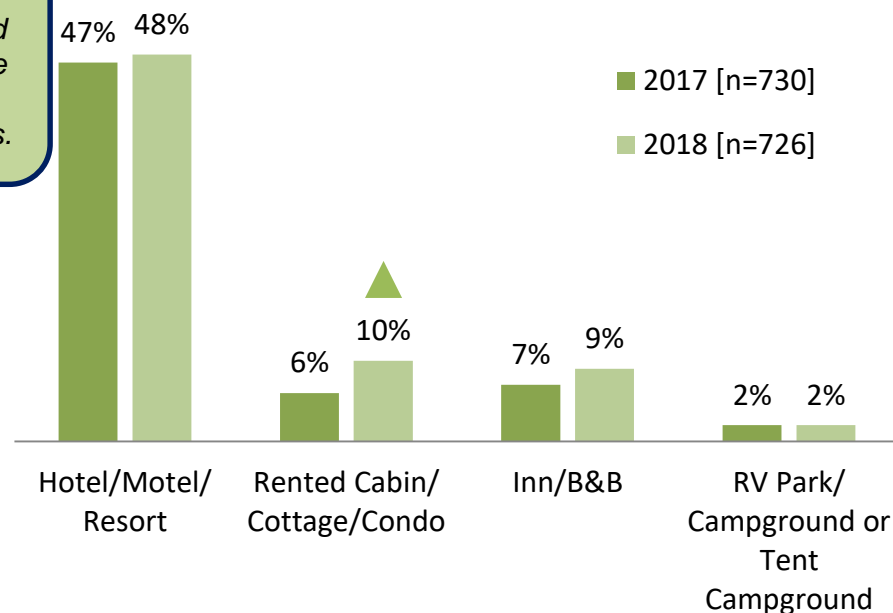
Seven in ten overnight Fall visitors stayed in paid accommodations, an increase over last Fall. Average length of stay was 3.3 nights.

Paid vs. Unpaid Accommodations
[n=726]



Business travelers, Canadian visitors and first-time visitors were more likely to stay in paid accommodations.

Type of Paid Accommodation



Average Length of Stay (# of Nights)

Overall	Canadians	First-Time Visitors	Traveling with Children
3.3	3.9	3.7	3.8

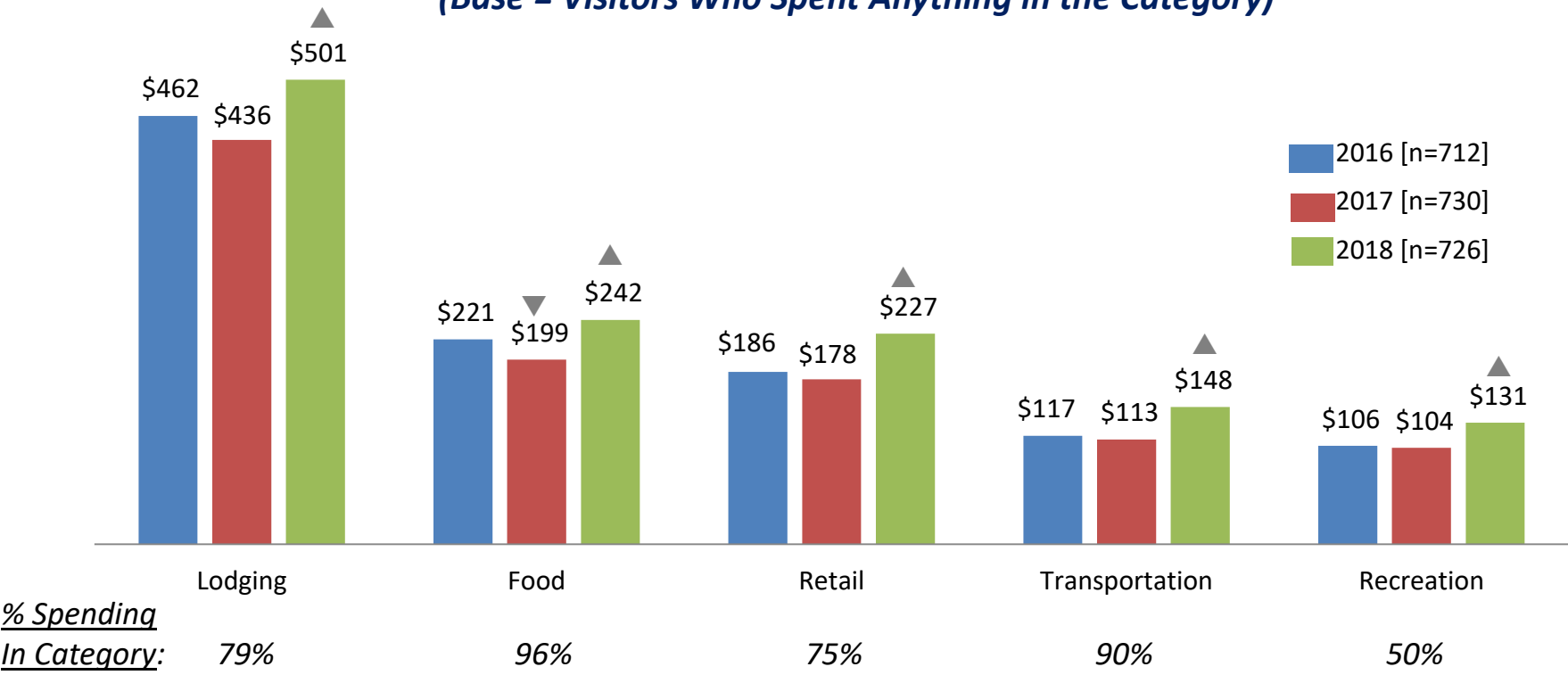
Overnight Q10. On this trip to Maine, how many nights were you away from home?

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

▲▼ notes significant difference between years at the 95% confidence level

Lodging continued to account for the greatest share of expenditures for Fall overnight visitors. Expenditures were up over the 2017 Fall season in all spending categories.

Average Trip Spending per Travel Party – Overnight Visitors*
(Base = Visitors Who Spent Anything in the Category)



**Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category.*

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

Average Trip Spending per Travel Party – Day Visitors*
(Base = Visitors Who Spent Anything in the Category)



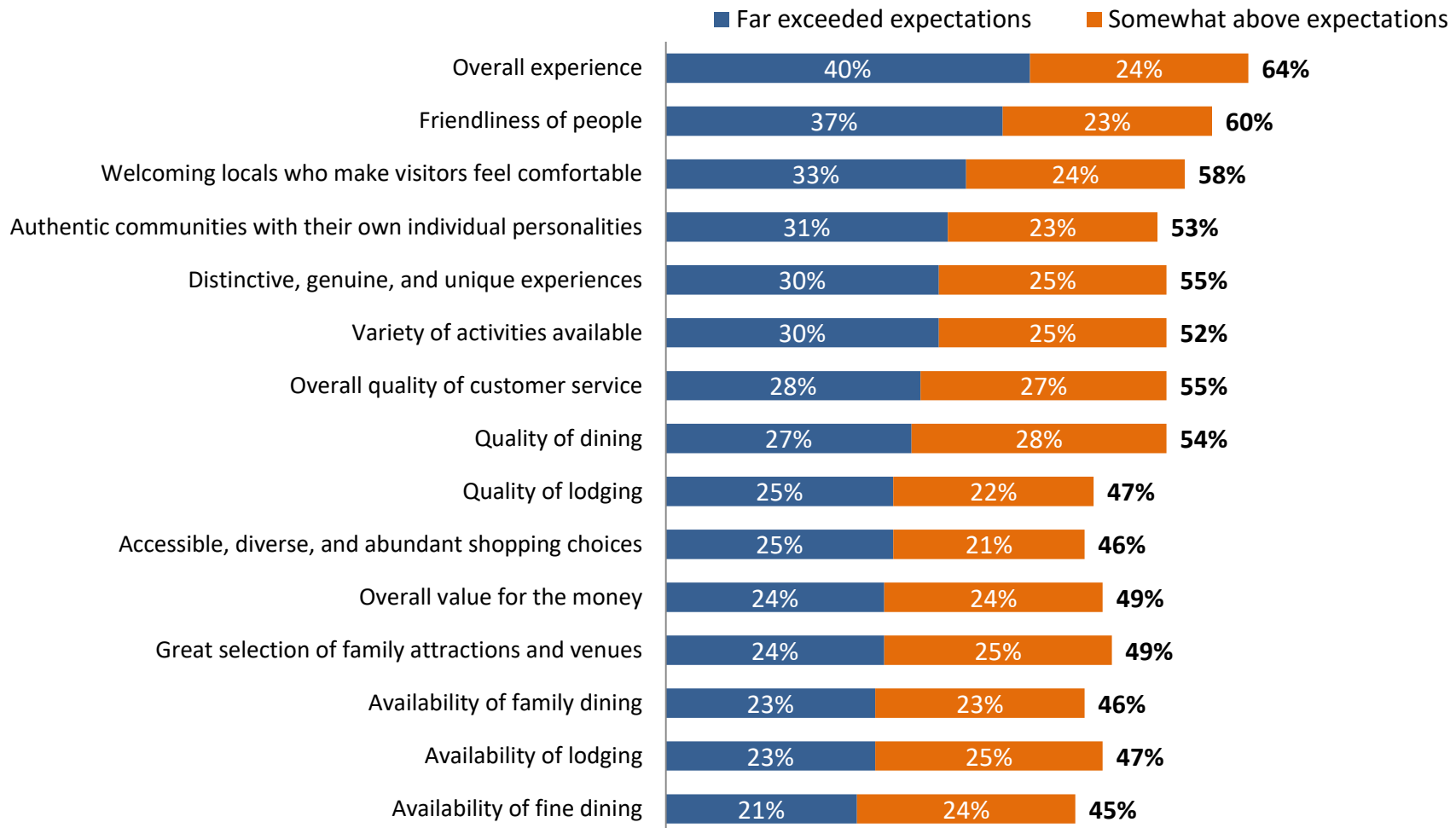
*Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category.

Trip Evaluation

Overnight visitors were most impressed with their *overall experience* in Maine, with two-thirds saying it exceeded their expectations. The *friendliness of the people* and *welcoming locals* also rated very high.

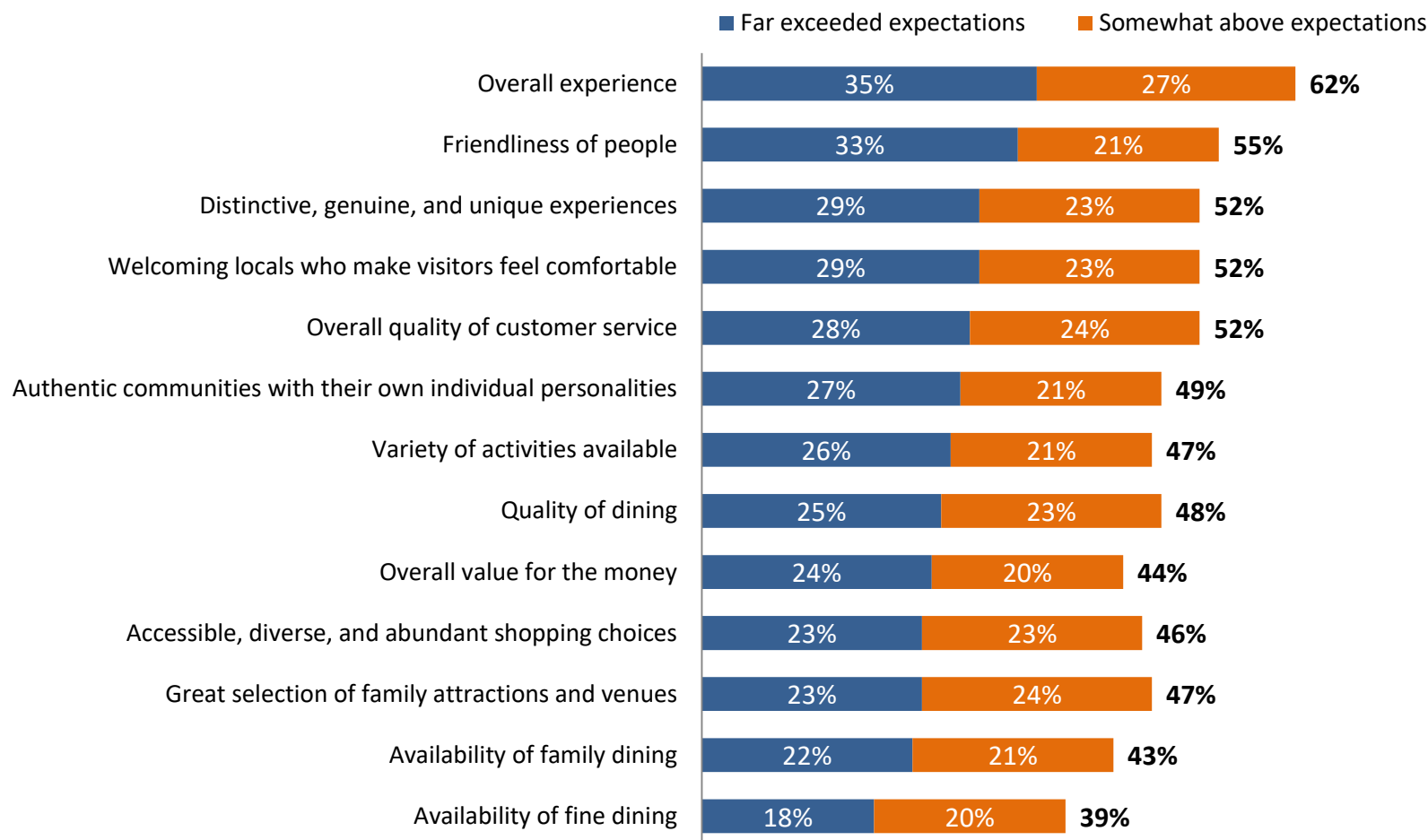
2018 Fall Season
(Sep – Nov 2018)

Evaluation of Trip Expectations for Overnight Visitors (n=730)



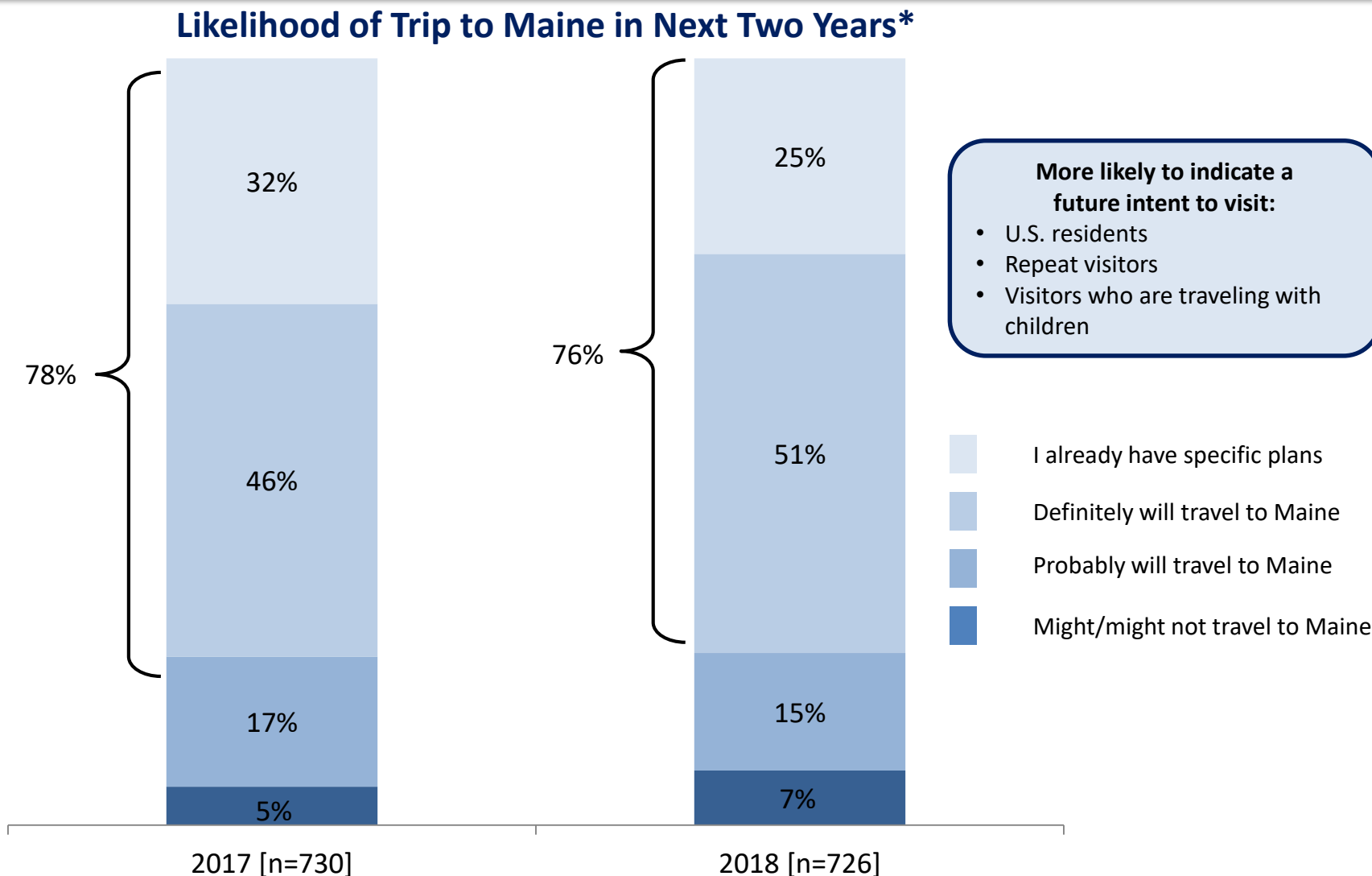
Day visitors were also most impressed by the *overall experience* of their visit to Maine and the *friendliness of the people*.

Evaluation of Trip Expectations for Day Visitors (n=500)



Future Travel

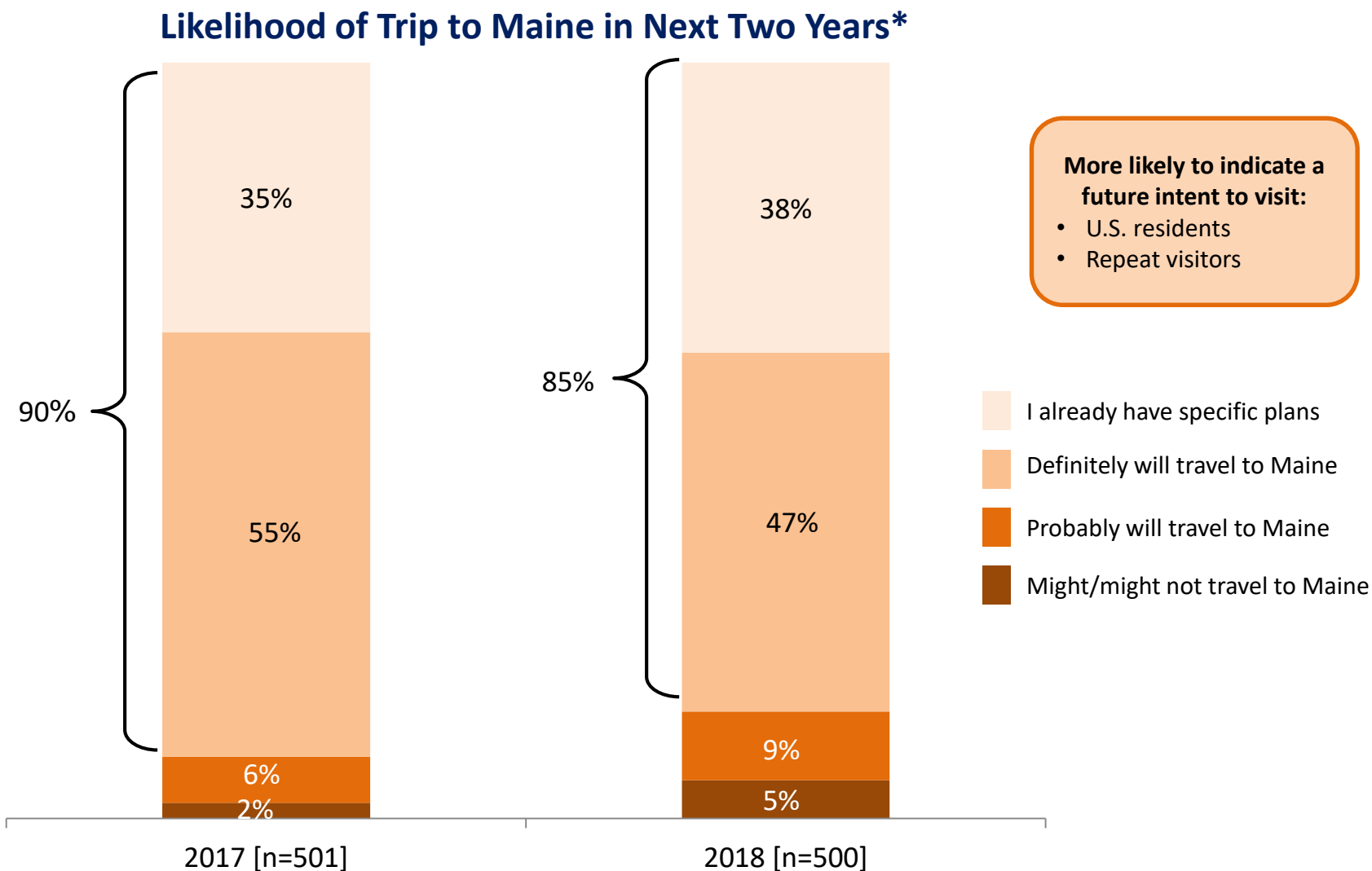
Three in four overnight Fall visitors plan to visit Maine again in the next two years.



Overnight Q44. How likely will you be to travel in Maine in the next two years?

*The proportion of respondents stating that they probably or definitely will not travel to Maine is negligible (<2%) and therefore not shown in this chart.

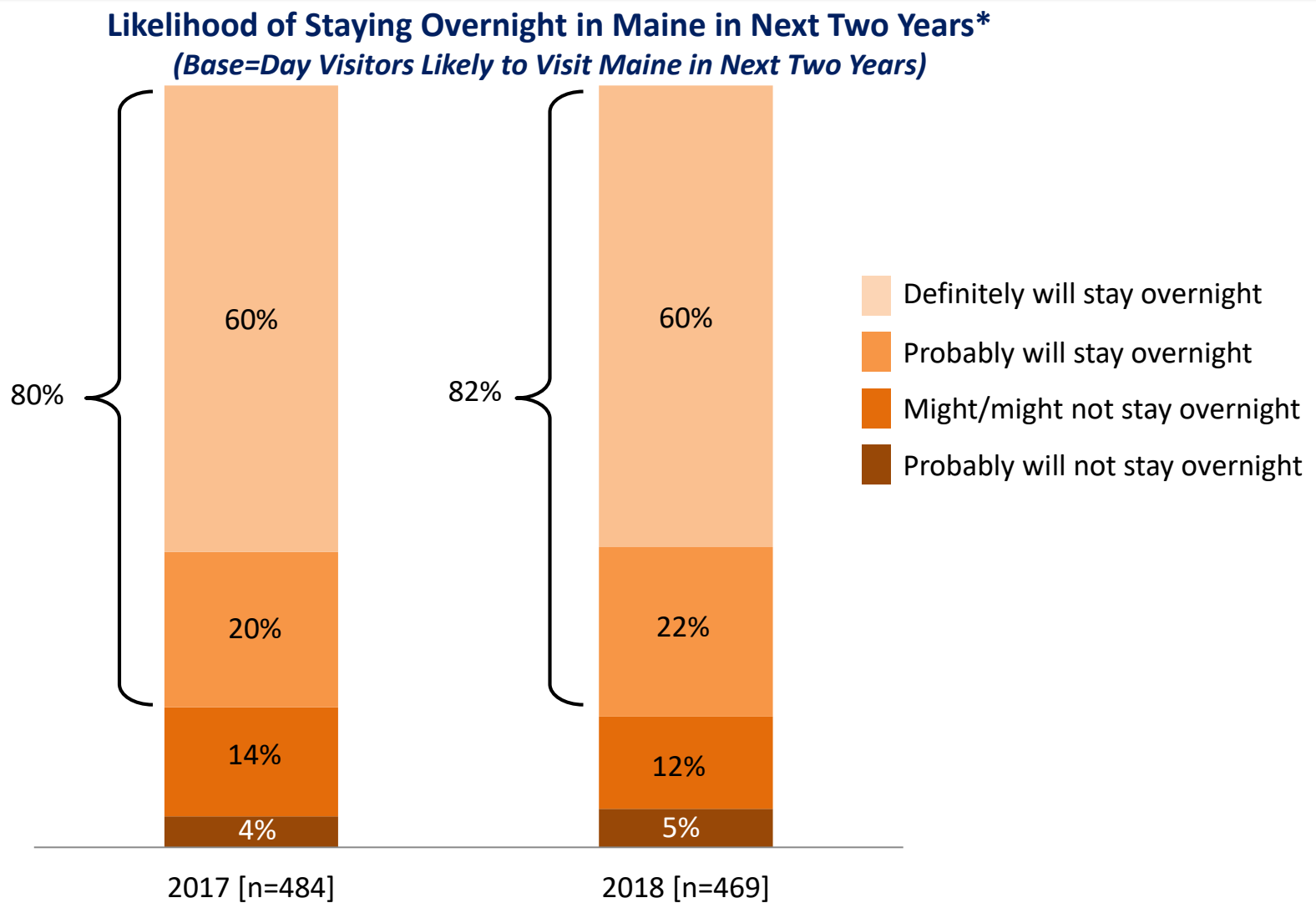
Day visitors expressed an even stronger intent to visit Maine, with nearly nine in ten planning to visit again.



Day Q31. How likely will you be to travel in Maine in the next two years?

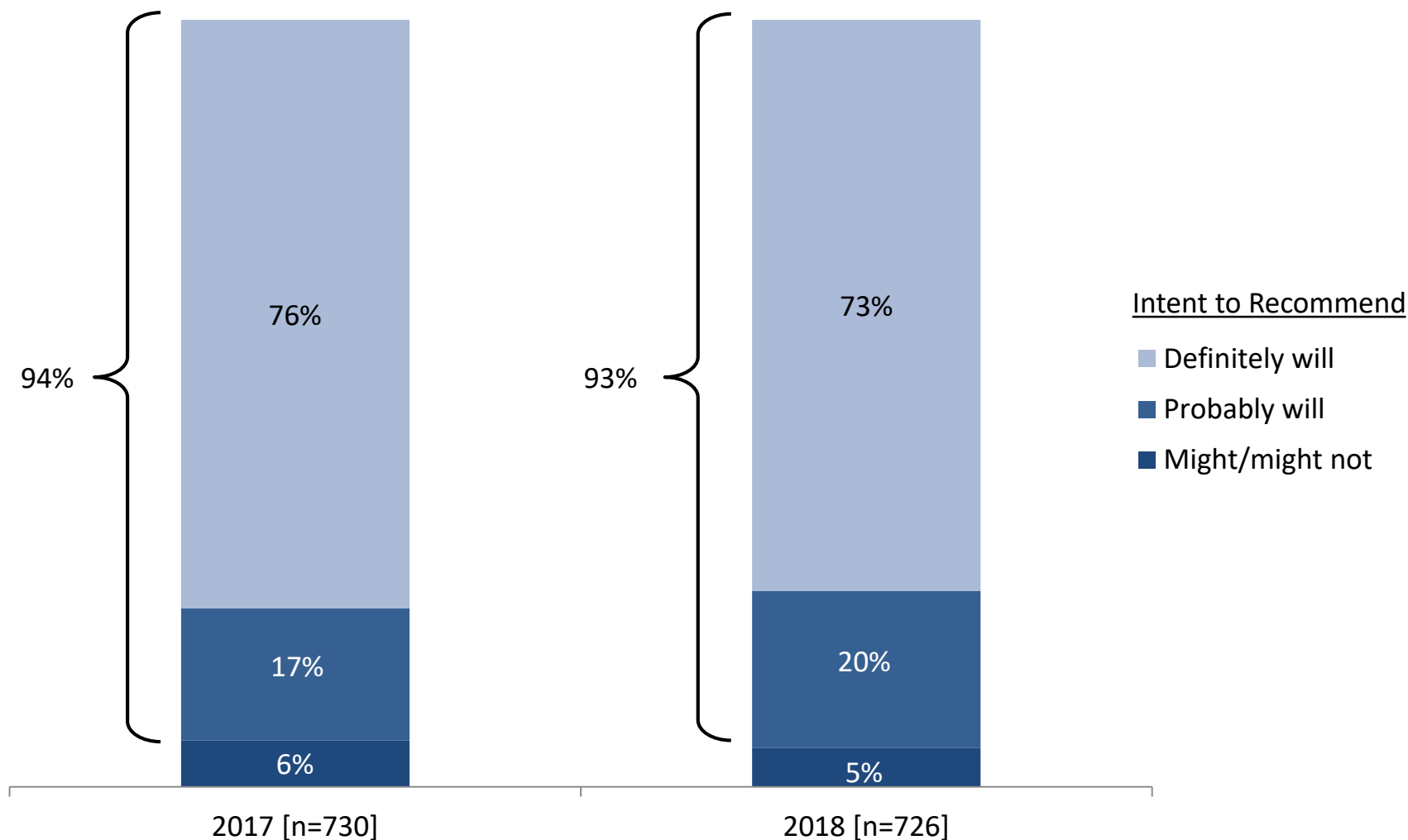
*The proportion of respondents stating that they probably or definitely will not travel to Maine is negligible (<2%) and therefore not shown in this chart.

Among day visitors who are likely to visit Maine again in the next two years, four in five indicated they *definitely or probably would stay overnight when they visit.*



Day Q32. Assuming you travel in Maine again in the next two years, how likely are you to stay overnight in Maine on one or more of these trips? *The proportion of respondents stating that they definitely will not stay overnight on their next visit is negligible (<1%) and therefore not shown in this chart.

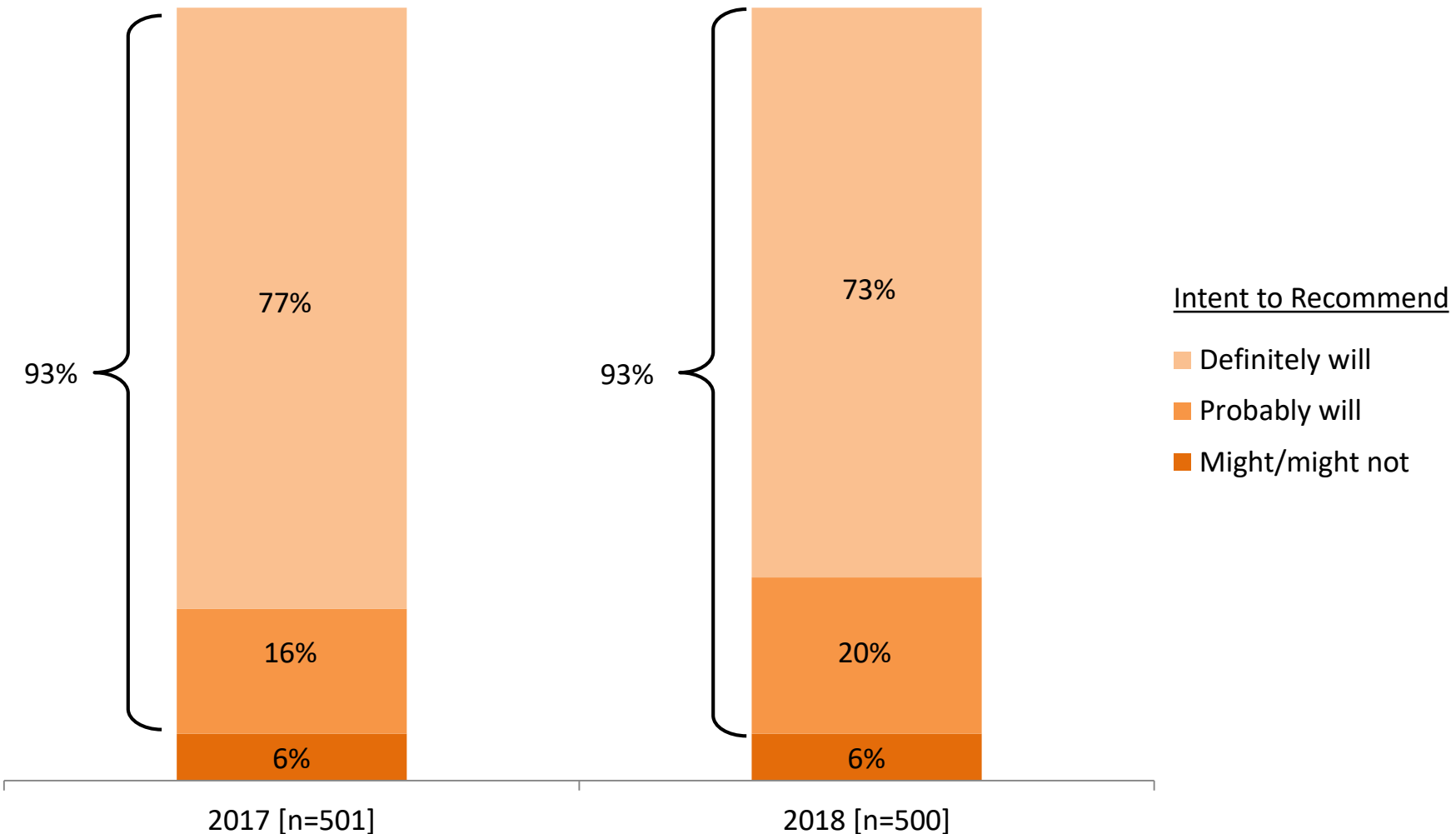
Overnight visitors' enjoyment of their vacation in Maine was echoed in their intent to recommend Maine as a vacation destination.



Overnight Q45: How likely are you to recommend Maine as a vacation destination to friends or relatives?

*The proportion of respondents stating that they probably or definitely will not recommend Maine is negligible (<2%) and therefore not shown in this chart.

Nine in ten day visitors indicated that they would be likely to recommend Maine as a vacation destination.



Appendix – Visitor Segment Analysis

Visitor Segment Analysis: Background

- In 2014, DPA conducted a market segmentation study in collaboration with BVK, which allowed for the development of a predictive model to segment and prioritize Maine's visitors. The culmination of this research effort was the creation of a Segment Typing Tool – a model with a short list of questions that can be used to predict segment membership in subsequent research studies, including the ongoing Visitor Profile Research.
- Three consumer segments were defined as high-priority segments for the Office of Tourism as a result of the market segmentation research:
 - **Balanced Achievers**
 - **Genuine Originals**
 - **Social Sophisticates**

Visitor Segment Analysis: Background

- DPA added the questions required by the segment typing tool into the Visitor Profile questionnaire and began collecting this supplemental data as of January 2015. We use this typing tool to categorize Maine's visitors into the various segments in order to compare their perceptions, travel behaviors, and future travel intentions across segments.
- This Appendix provides a topline profile and comparison of these priority segments as they relate to Maine's Fall visitors.
- **Important Note:** *Sample sizes are extremely low in this seasonal analysis for the Social Sophisticates segment. Please use caution in interpreting the findings for this segment.* At the completion of the 2018 research, an in-depth segmentation analysis will be completed for the entire year, at which time sample sizes will be sufficient to draw conclusions for all visitor segments.

Visitor Segment Analysis: Key Findings

Balanced Achievers:

- More likely than Genuine Originals to be from Canada
 - Largest % of overnight visitors
- Most likely to visit the *Maine Highlands* (day visitors)

Genuine Originals:

- Among the oldest
- More likely than Balanced Achievers to be from New England (overnight visitors)
- More likely than Balanced Achievers to visit *Greater Portland*
- Largest % of day visitors

Social Sophisticates:

- Smallest % of visitors
- Most likely to visit *Maine Beaches* (day visitors)

Balanced Achievers and **Genuine Originals** make up the largest share of Maine's Fall season visitors.

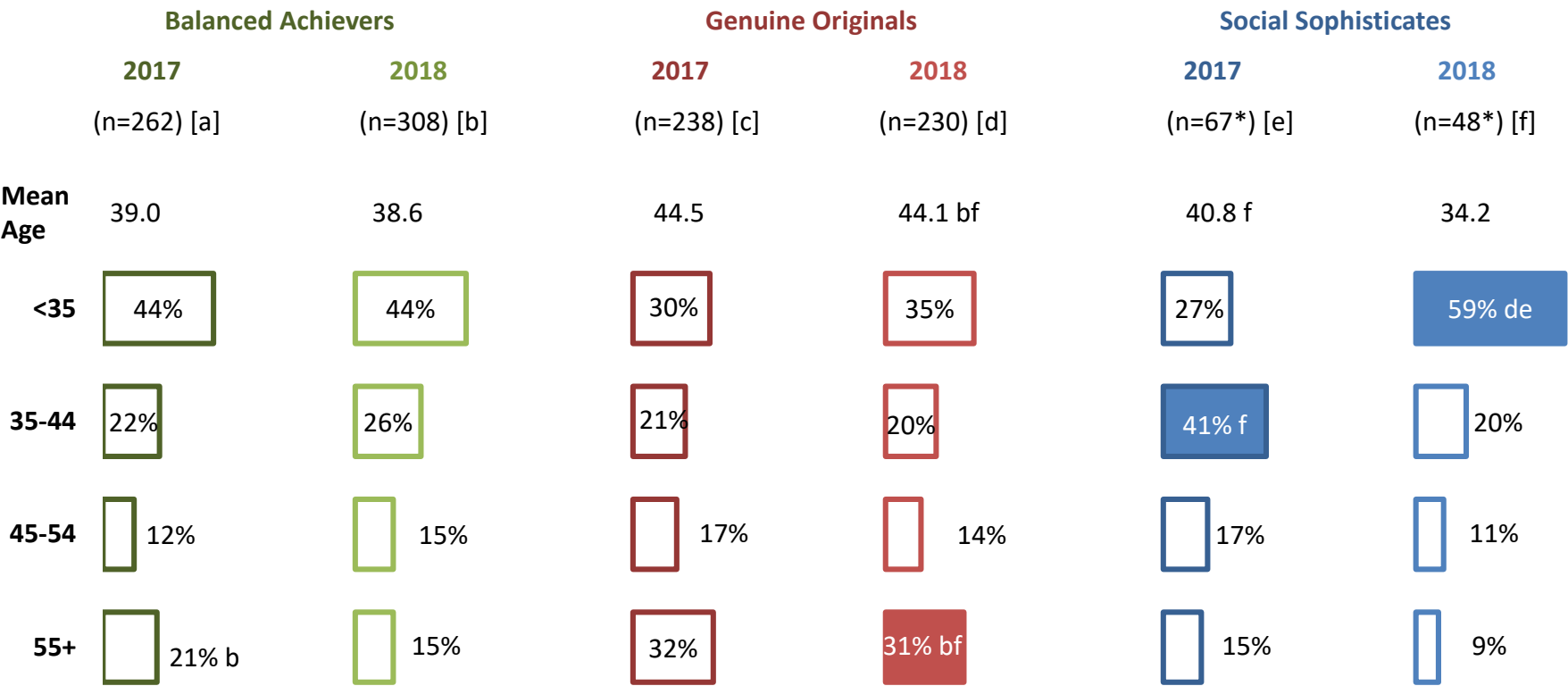
- Social Sophisticates* make up a significantly smaller proportion of visitors to Maine during the Fall season.

Fall Visitor Segments

	Fall Overnight Visitors		Fall Day Visitors	
	2017 (n=730)	2018 (n=726)	2017 (n=501)	2018 (n=500)
Balanced Achievers	36%	42%	24%	28%
Genuine Originals	33%	32%	33%	33%
Social Sophisticates	9%	7%	8%	9%

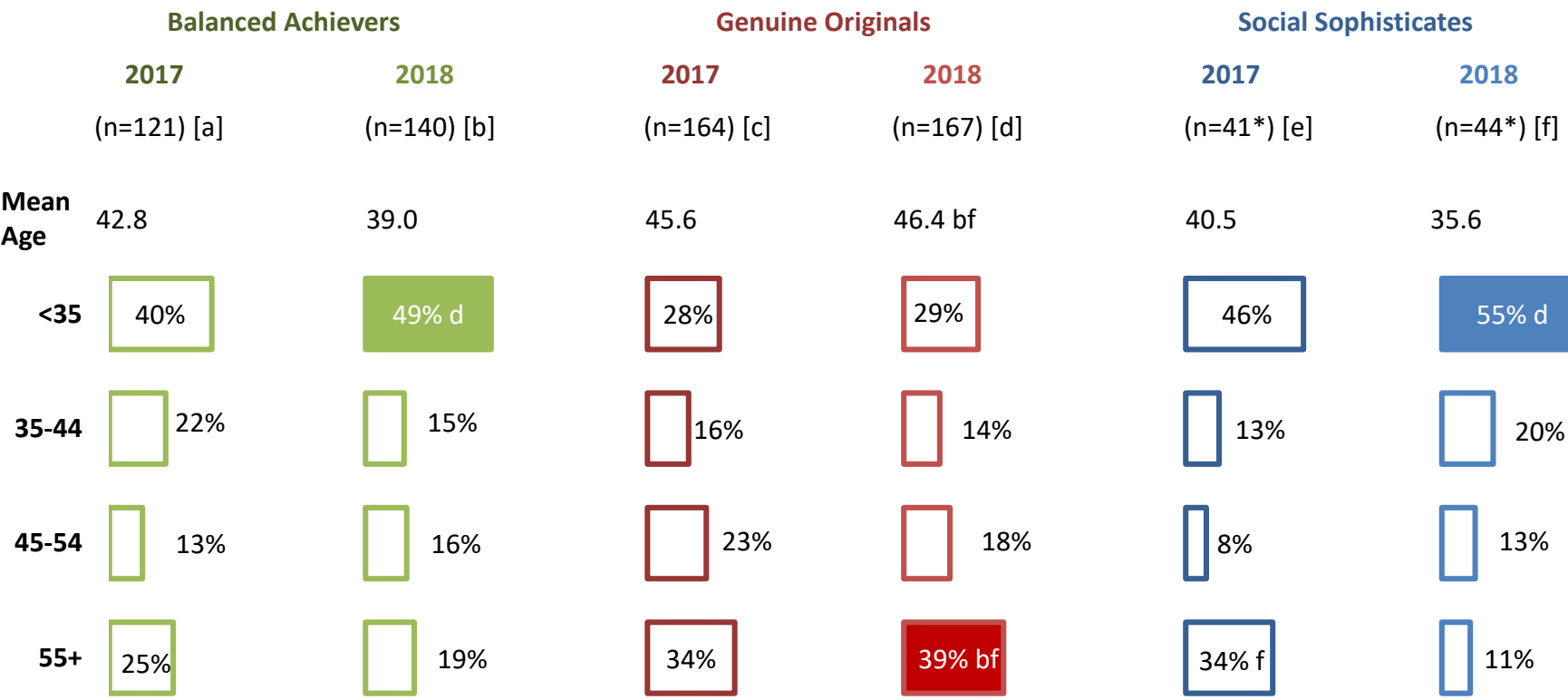
Overnight visitors categorized as *Genuine Originals* tend to be substantially older than *Balanced Achievers*. *Social Sophisticates* tend to be much younger than either of the other groups.

Age of Fall Overnight Visitors by Visitor Segment



Among day visitors, *Genuine Originals* trend substantially older than *Balanced Achievers*. *Social Sophisticates* tend to be much younger than either of the other groups.

Age of Fall Day Visitors by Visitor Segment



Overnight visitor origin fluctuated between 2017 and 2018 by visitor segment, particularly for *Balanced Achievers* and *Genuine Originals*.

State/Province of Origin by Visitor Segment: Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=262) [a]	2018 (n=308) [b]	2017 (n=238) [c]	2018 (n=230) [d]	2017 (n=67*) [e]	2018 (n=48*) [f]
United States (NET)	85%	80%	90%	90% b	89%	87%
New England (NET)	52% b	41%	71% ad	58% b	67% a	58% b
Massachusetts	22%	23%	33% a	39% b	32% a	44% b
Maine	16% be	8%	11% d	5%	8%	--
New Hampshire	6%	3%	15% ad	4%	18% a	7%
Connecticut	5%	3%	9%	5%	7%	3%
Rhode Island	2%	4%	1%	3%	--	3%
Vermont	1%	1%	2%	2%	1%	1%
Mid-Atlantic (NET)	32% c	39%	19%	32% c	22%	29%
New York	12%	23% ad	7%	16% c	16%	21%
New Jersey	8% be	4%	4%	3%	1%	4%
Pennsylvania	8%	7%	6%	9%	4%	3%
Maryland	4%	3%	2%	2%	--	--
Delaware	1%	1%	--	1%	--	--
Canada (NET)	15%	20% d	10%	10%	11%	13%
Ontario	10%	14% d	7%	8%	8%	7%
Quebec	4% c	4%	1%	2%	3%	2%
New Brunswick	<1%	1%	1%	--	1%	4%

State/Province of Residence

*Please note small sample size. Use caution when interpreting results.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Visitor origin for day visitors appears to be relatively stable between 2017 and 2018 for each of the visitor segments.

State/Province of Origin by Visitor Segment: Day Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=121) [a]	2018 (n=140) [b]	2017 (n=164) [c]	2018 (n=167) [d]	2017 (n=41*) [e]	2018 (n=44*) [f]
United States (NET)	79%	88%	89% a	95% bc	98% ac	96% b
Massachusetts	34%	38%	36%	39%	56% ac	49%
Maine	31%	25%	29%	34%	21%	22%
New Hampshire	14%	21%	19%	17%	18%	26%
Rhode Island	<1%	2%	2%	1%	3%	--
Vermont	<1%	1%	3%	4%	--	--
Canada (NET)	21% ce	12% df	11% de	5%	2%	4%
Quebec	8%	5%	7% d	2%	--	1%
New Brunswick	12% cd	7%	4%	3%	1%	2%

Q2. State/Province of Residence

* Please note small sample size. Use caution when interpreting results.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Overnight regional visitation patterns differ somewhat by visitor segment.

- Visitors categorized as *Social Sophisticates* are the least likely to visit the Mid-Coast region, as compared to those categorized as *Genuine Originals* or *Balanced Achievers*.

Primary Regional Destination of Overnight Visitors By Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=262) [a]	2018 (n=308) [b]	2017 (n=238) [c]	2018 (n=230) [d]	2017 (n=67*) [e]	2018 (n=48*) [f]
Maine Beaches	21%	20%	29% a	25%	42% a	30%
Greater Portland/Casco Bay	14% b	7%	22% bd	13% b	17%	18%
Downeast & Acadia	14%	16%	16%	17%	9%	17%
Maine Highlands	18% ce	22% d	10%	10%	7%	12%
Maine Lakes & Mountains	11% e	10%	11%	7%	4%	14%
Mid-Coast	8%	11% f	7%	15% cf	12%	4%
Kennebec Valley	7% c	7%	3%	8% c	6%	--
Aroostook County	6% c	5%	1%	4% c	2%	6%

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

* Please note small sample size. Use caution when interpreting results.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Regional visitation patterns among day visitors also differ somewhat by visitor segment.

- Day visitors categorized as *Balanced Achievers* are the most likely to visit the Maine Highlands region, while those categorized as *Genuine Originals* are the most likely to visit the Mid-Coast region.

Primary Regional Destination of Day Visitors By Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2017 (n=121) [a]	2018 (n=140) [b]	2017 (n=164) [c]	2018 (n=167) [d]	2017 (n=41*) [e]	2018 (n=44*) [f]
Maine Beaches	31%	30%	32%	37%	71% ac	62% bd
Greater Portland/Casco Bay	14%	8%	12% d	4%	10%	5%
Downeast & Acadia	18%	16% f	12%	13% f	9%	2%
Maine Highlands	14%	16% df	10%	8%	5%	5%
Maine Lakes & Mountains	8%	14% f	12% e	12%	2%	5%
Mid-Coast	8% e	7%	10% e	14% bf	1%	2%
Kennebec Valley	5%	4%	8% e	6%	1%	13%
Aroostook County	3%	3%	3%	6%	1%	2%

Day Q21. What region in Maine was your primary destination?

* Please note small sample size. Use caution when interpreting results.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Research Objectives and Methodology

Objectives

Three distinct online surveys are used to achieve the five primary goals of Maine’s visitor tracking research.

Research Objectives	Survey Instruments		
	National Omnibus	Overnight Visitor	Day Visitor
Identify Maine’s share of the U.S. travel market	✓		
Estimate the number of visitors who come to Maine	✓	✓	✓
Provide a profile of Maine visitors		✓	✓
Estimate the amount of spending generated by tourism in Maine		✓	✓
Determine the Maine traveler’s level of satisfaction and view of Maine		✓	✓

Description of Survey Instruments

National Omnibus Survey

- Nationally representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine’s borders
- Have taken a day trip in Maine greater than 50 miles from home in the last four weeks
- Surveyed monthly

Methodology

- This report presents results from the Fall 2018 season, describing travel that occurred between September 1 and November 30, 2018.
- Fall data collection occurred monthly between October 1 and December 14, 2018. The number of completed surveys collected with each survey instrument is as follows:

Survey Instruments	Completed Fall Season Surveys
Overnight Visitor Survey	726
Day Visitor Survey	500
National Omnibus Survey	9,158

- Statistical significance between subgroups was calculated at the 95% confidence level and is noted throughout by a/b/c/etc. or ▲▼ .



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