



Maine Office of Tourism

Profile of Travelers to Maine and Their Trips in the Summer of 2019

Seasonal Topline

November 2019



Table of Contents

Executive Summary.....	3
Summer 2019 Travel Context.....	6
Summer 2019 Travel Highlights.....	16
Trip Evaluation.....	33
Future Travel.....	36
Appendix – Visitor Segment Analysis.....	42
Research Objectives and Methodology.....	48

Executive Summary



Executive Summary

- Travel to Maine benefitted from several factors in the summer of 2019:
 - Domestic leisure travel grew slightly from 2018, and business travel held steady;
 - Travel prices and the costs of goods and services overall rose only slightly;
 - The cost of gasoline fell slightly and was lower in Maine than the nation as a whole;
 - The national unemployment rate remained very low;
 - The Canadian exchange rate held steady; and
 - Weather in the state was about average in terms of temperature and precipitation.
- Maine welcomed almost **29 million visitors** on tourism-related trips in the summer of 2019: **12 million on an overnight trip** and **17 million visiting for the day**.
 - This represents **3% growth overall**, thanks to a strong increase in **overnight visitation (+8%)**, which offset a small decline in **day visitation (-.7%)**.
- The characteristics of summer visitors generally held steady:
 - **Overnight** visitors to Maine were 38 years old, on average, and were most likely to live in the Mid-Atlantic region. One-third were visiting Maine for the first time. The Beaches was the most popular region, though Downeast & Acadia, the Highlands, and the Lakes & Mountains were also popular among overnight visitors.
 - Summer 2019 **day trippers** to Maine were 43 years old, on average, and were mostly from Massachusetts or Maine. Almost all had traveled to or within Maine before. The Maine Beaches remained the most popular region for these visitors, by a wide margin.

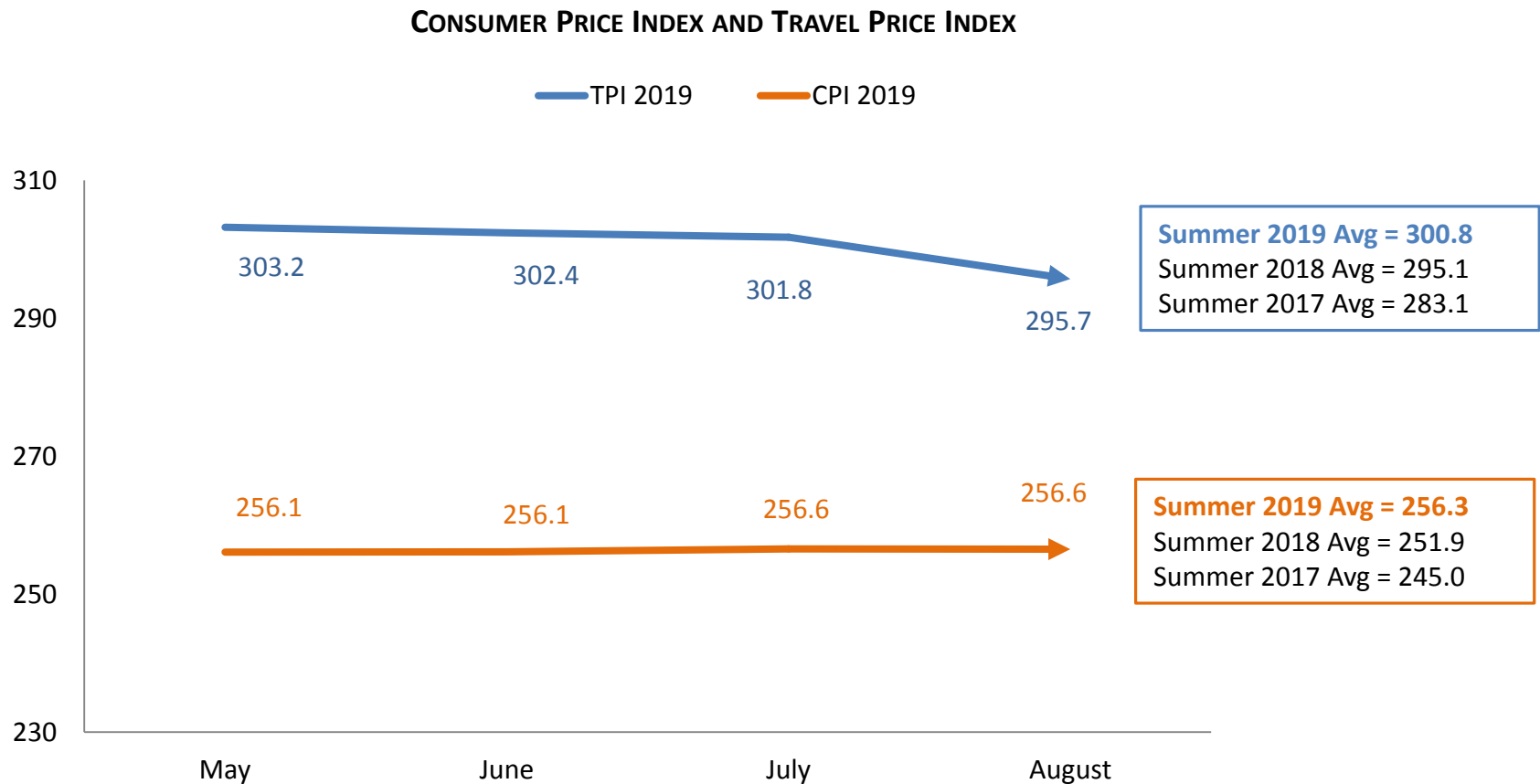
Executive Summary

- **Overnight** visitors spent much more on lodging than anything else, and spent more on lodging in 2019 than in previous years. **Day** visitors spend as much on shopping as they did on food.
- Culinary activities, shopping, sightseeing, and active outdoor activities were the most popular interests for both **overnight** and **day** visitors.
- Summer travelers were highly satisfied with their trips:
 - Two out of three overnight and day travelers say their overall experience exceeded their expectations, and majorities say their expectations for many other, more specific areas were exceeded as well.
 - Intent to return to Maine within the next two years remains high, as does the likelihood of recommending Maine as a vacation destination. A large majority of **day trippers** are likely to stay overnight during the next visit.

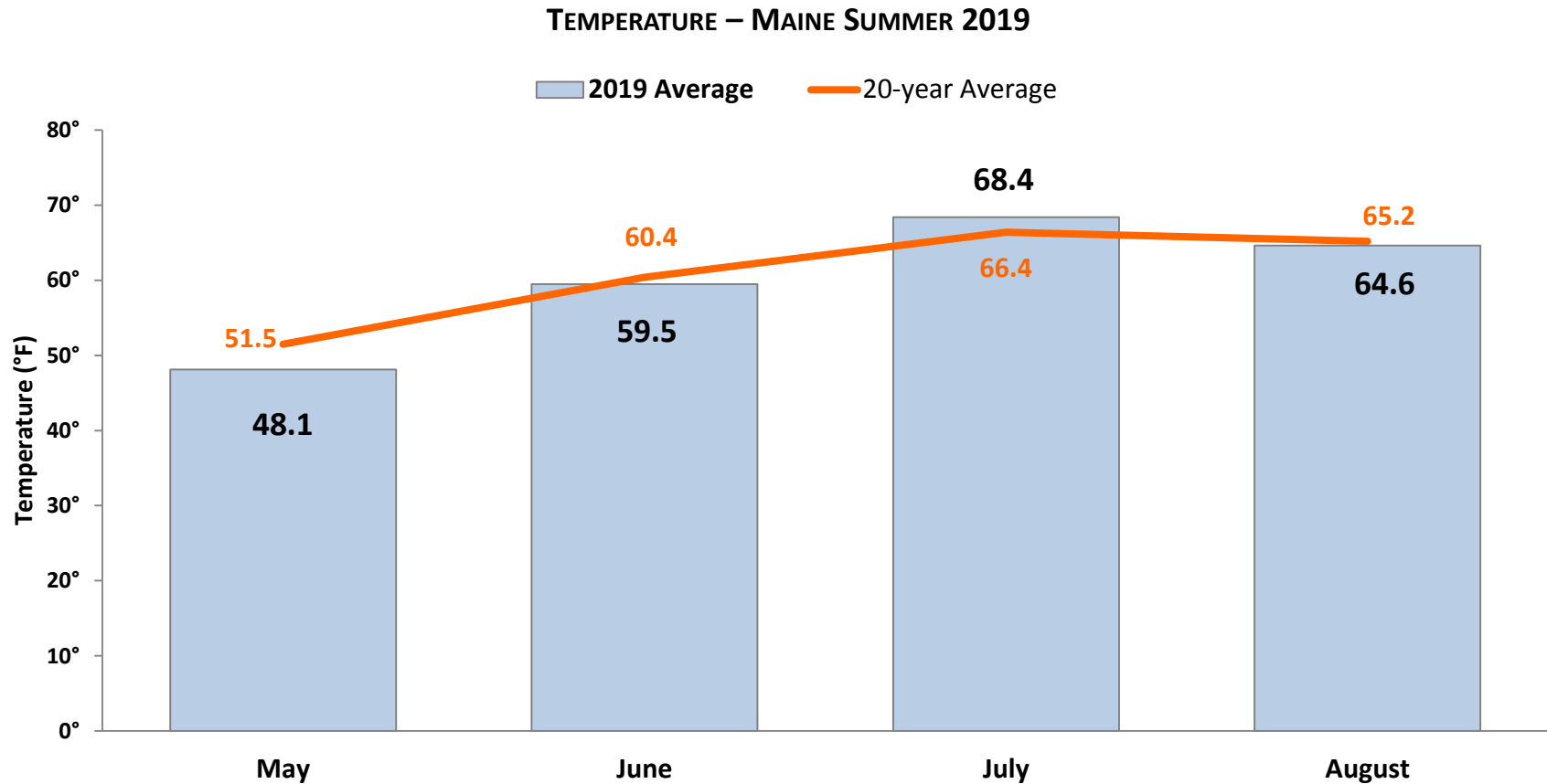
Summer 2019 Travel Context



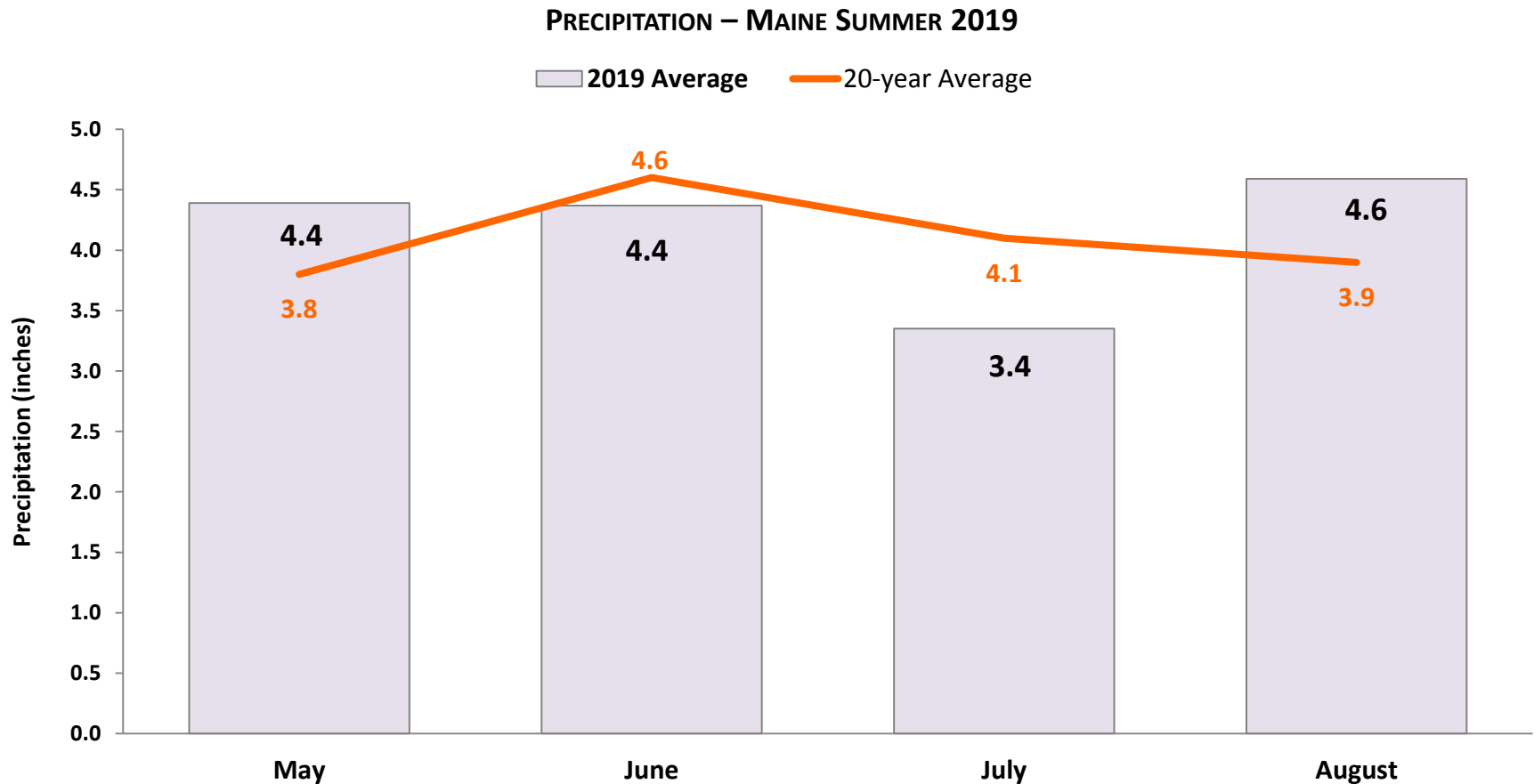
Travel costs and the costs of consumer goods overall were both higher in the summer of 2019 than previous summers, though the Travel Price Index showed less growth between 2018 and 2019 than in previous years.



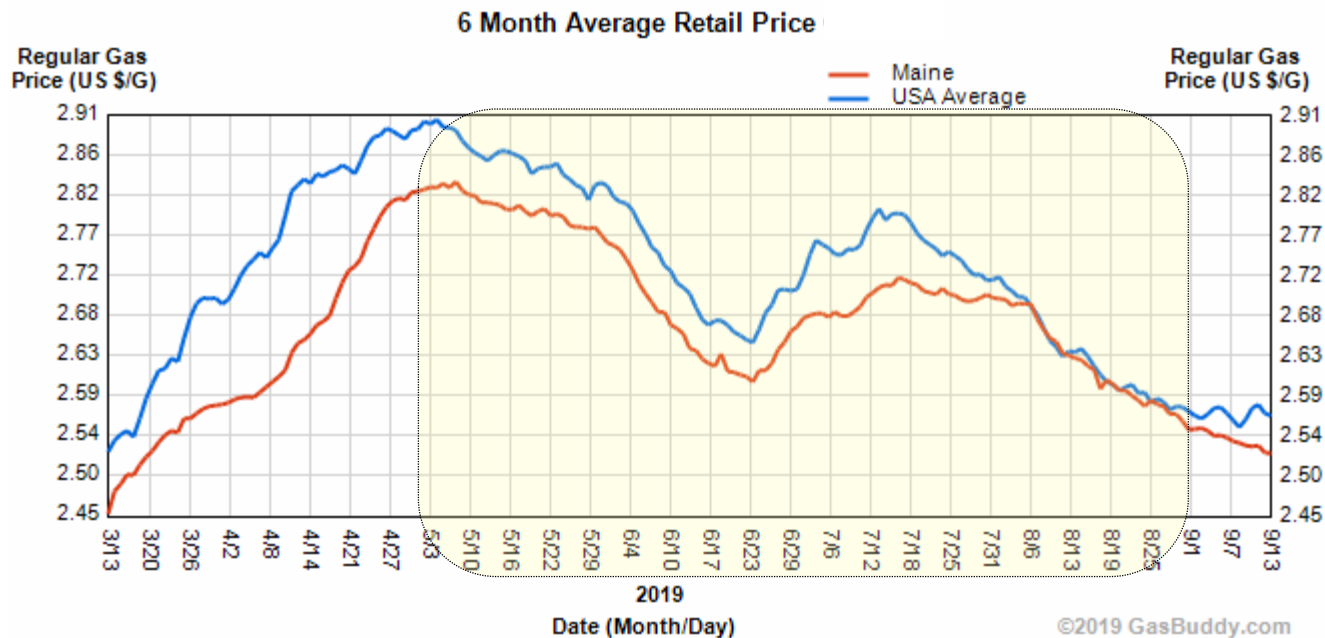
Overall, temperatures in Maine remained close to the 20-year average throughout the summer of 2019.



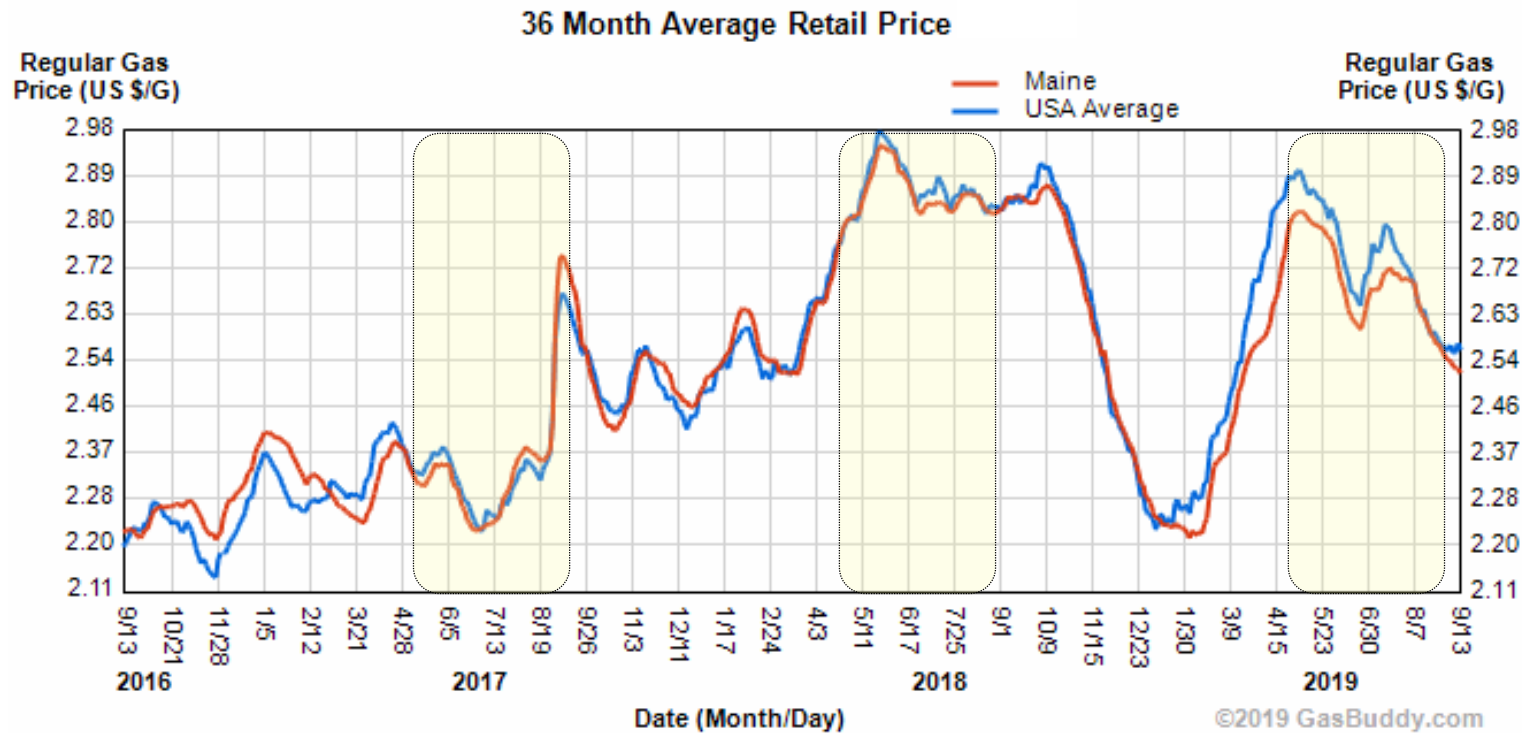
While May and August were slightly wetter than the 20-year average, July was slightly drier than usual.



Gas prices peaked in early May and reached a low point in late August. For the most part, gas prices were slightly lower in Maine than in the country as a whole last summer.

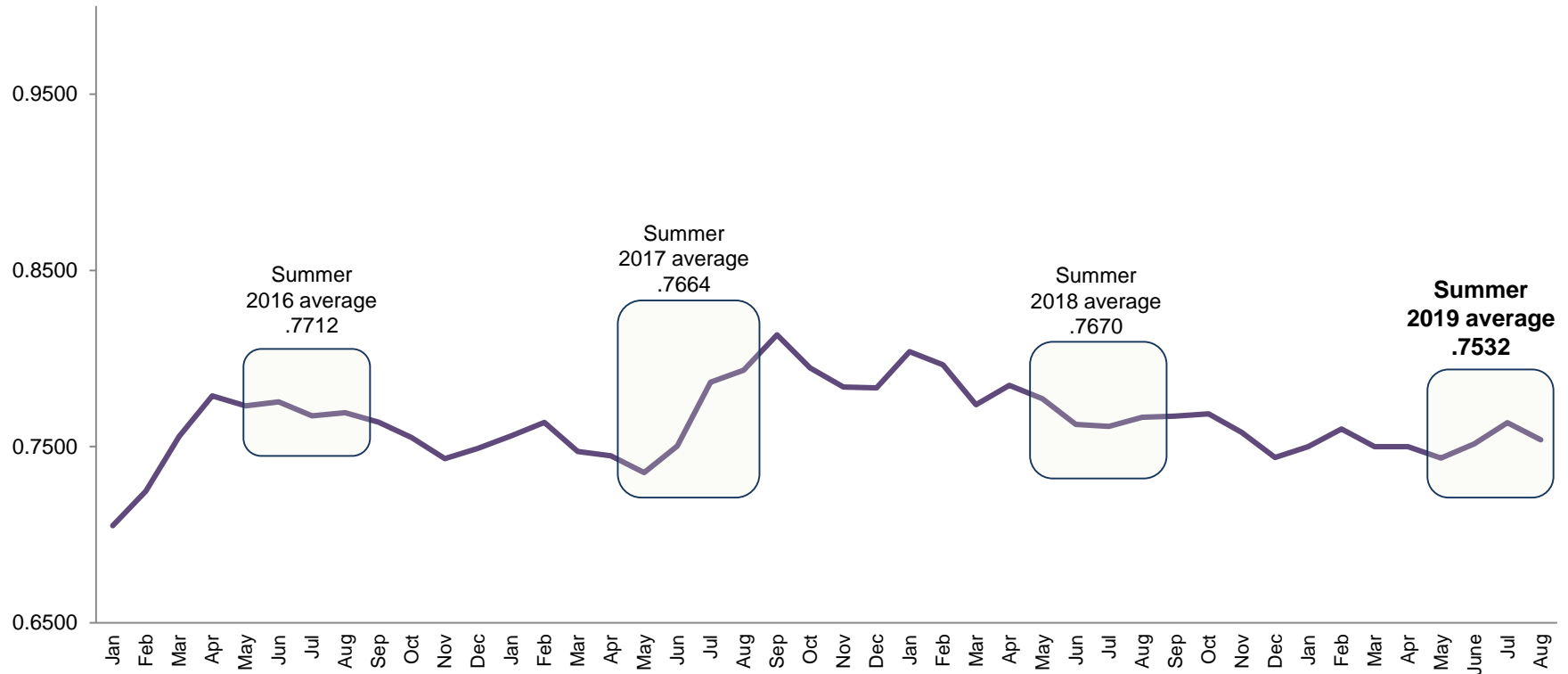


Overall, gas was slightly less expensive in the summer of 2019 than the summer of 2018, though it was still considerably more expensive than it was in the summer of 2017.



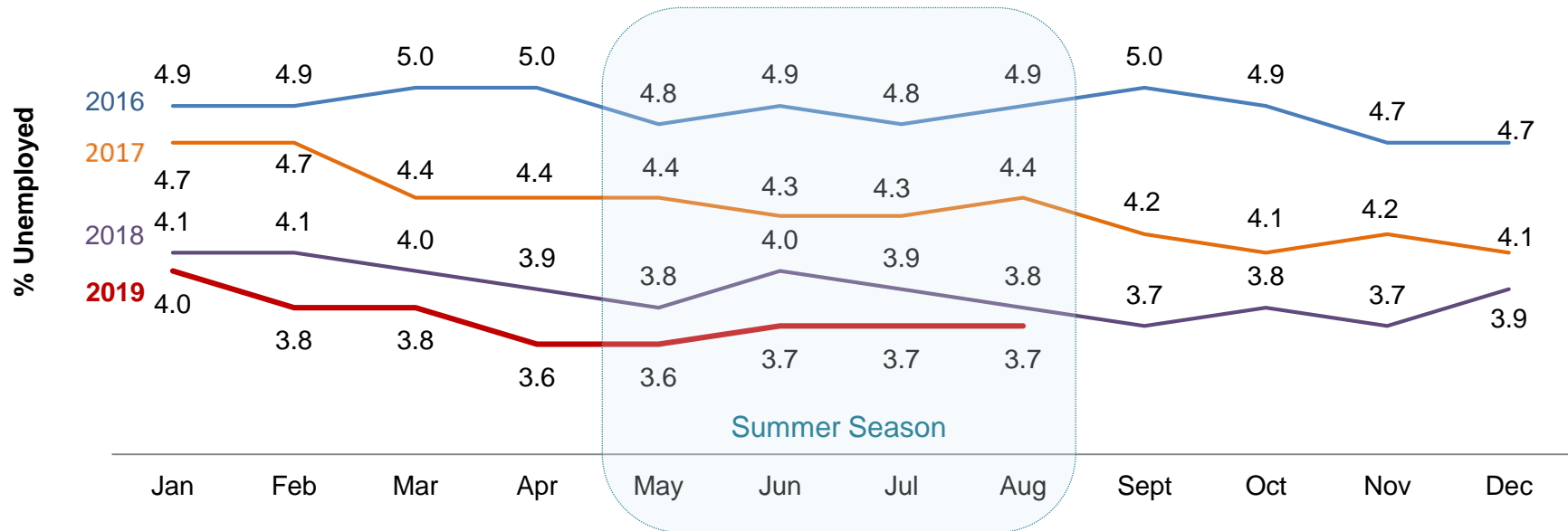
The Canadian exchange rate remains in line with historical averages overall.

CANADIAN EXCHANGE RATE
2016-2019



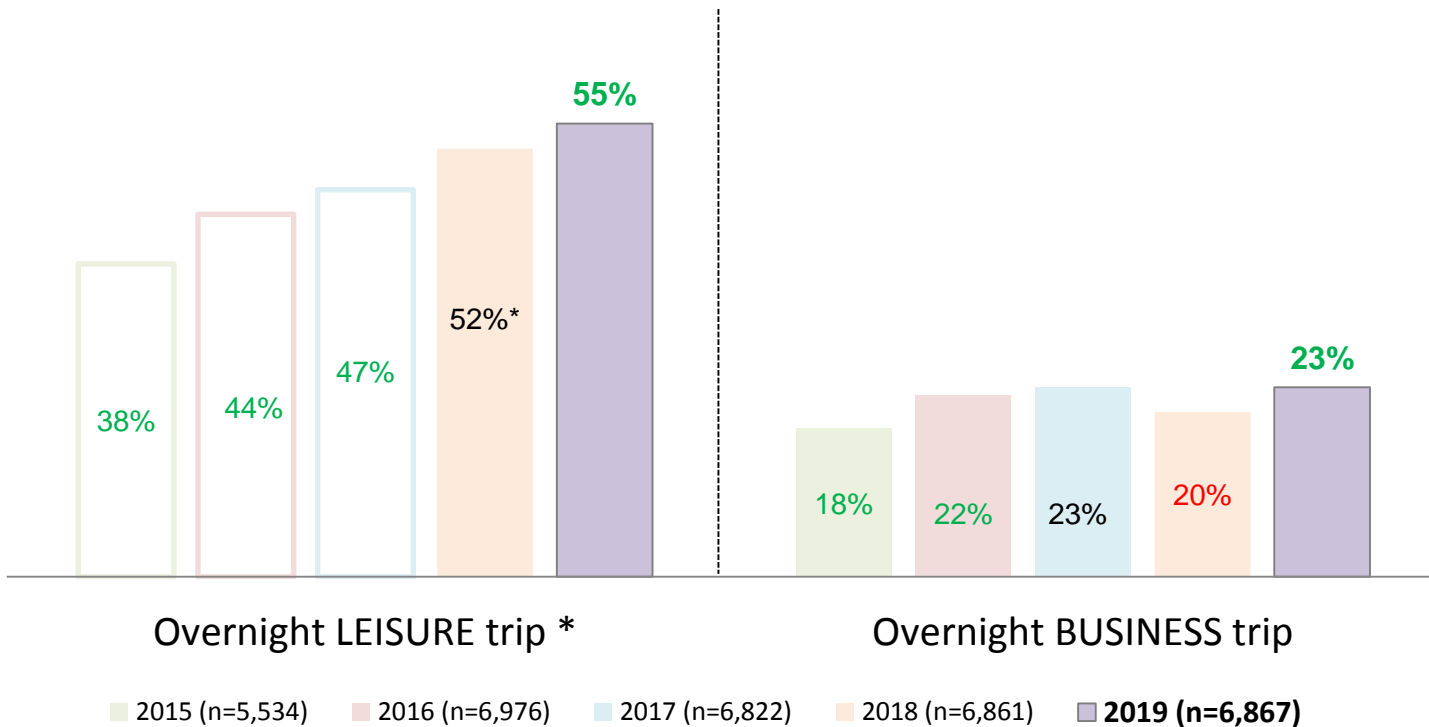
The national unemployment rate remained at historically low levels in the summer of 2019.

UNITED STATES UNEMPLOYMENT RATE BY MONTH
2016-2019



More than half of Americans took an overnight leisure trip in the summer of 2019, representing slight growth from 2018. Almost one-quarter traveled for business over the summer, on-par with the historical average.

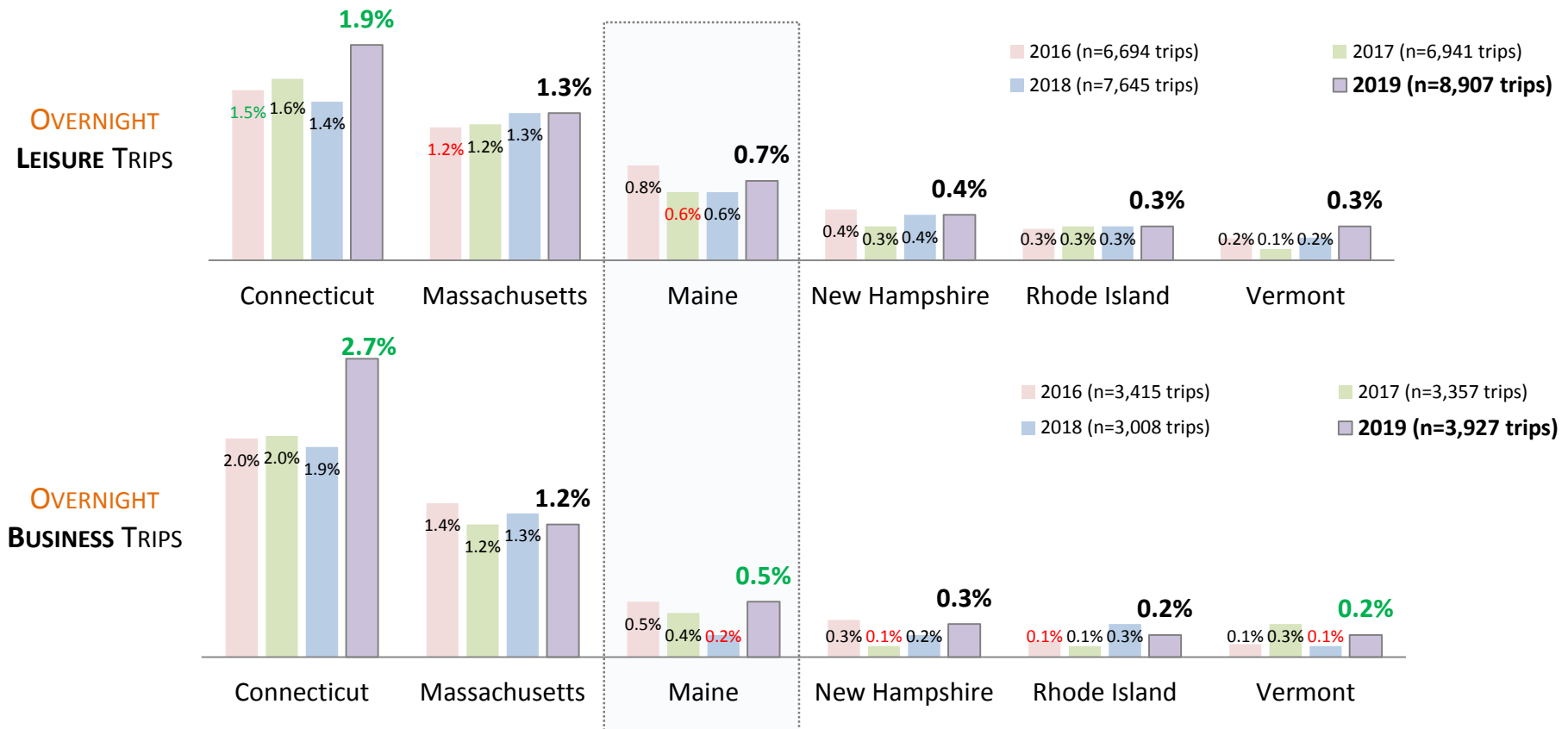
**PROPORTION OF U.S. RESIDENTS TAKING A TRIP
DURING THE SUMMER SEASON: 2015-2019**



*In 2018, data collection was modified to only measure leisure travel and business travel, eliminating the separate category of VFR travel. Therefore, leisure travel proportions from 2018 and 2019 are not directly comparable to prior years' data.

Maine continues to receive almost 1% of the nation's overnight leisure and business travel. The state's share of business travel has returned to its historical average after a decline in the summer of 2018.

SHARE OF U.S. TRAVEL DURING THE SUMMER SEASON



* In 2018, data collection was modified to only measure leisure travel and business travel, eliminating the separate category of VFR travel. Therefore, leisure travel proportions from 2018 and 2019 are not directly comparable to prior years' data.

Summer 2019 Travel Highlights



Estimated visitation to Maine in the summer of 2019 grew by 3% overall. A strong increase in overnight travel (+8%) more than offset a small decline in day travel (-.7%).

**SUMMER SEASON
VISITATION ESTIMATES***
(M = MILLION)

	Summer 2017	Summer 2018	Summer 2019	% Change 2018 - 2019
Total	26.2 M	28.1 M	28.9 M	+ 3.0%
Overnight Visitors	10.4 M	11.0 M	12.0 M	+ 8.2%
Day Visitors	15.8 M	17.1 M	16.9 M	- 0.7%

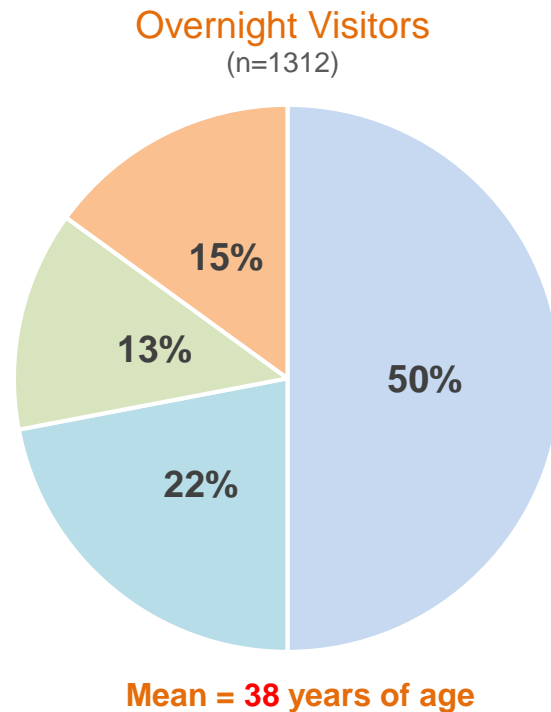
**For the purposes of visitation estimates, only visitors on tourism-related trips are included.*

Tourism-related trips include:

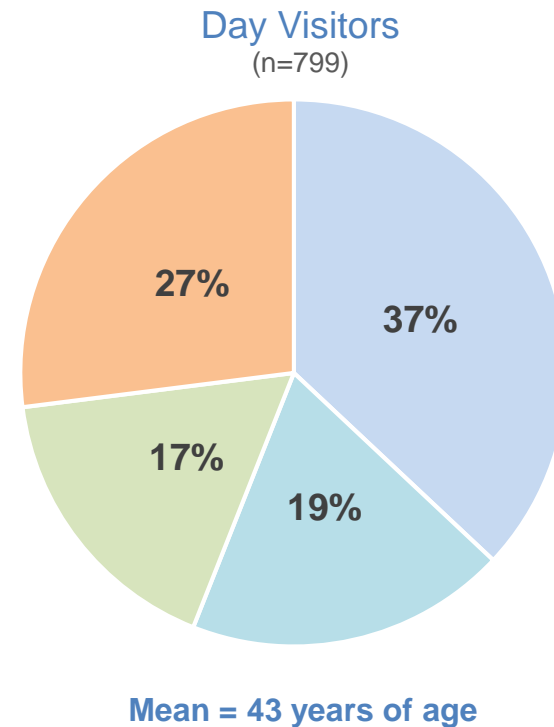
- *All leisure trips EXCEPT those for a funeral, family reunion, or class reunion.*
- *Business trips that are for a convention/conference/trade show or training/professional development.*

Maine's summer visitors in 2019 were in their late 30s or early 40s, on average, with day visitors slightly older than overnight visitors.

AGE OF SUMMER VISITORS



- <35
- 35-44
- 45-54
- 55+



After strong growth in the summer of 2019, Canadians now account for one-fifth of overnight visitors to Maine. Visitation from New England declined over the past year.

OVERNIGHT TRAVELER RESIDENCE

	2016 (n=1323)	2017 (n=1314)	2018 (n=1306)	2019 (n=1312)
U.S.	87%	91%	87%	81%
New England	37%	62%	36%	28%
MA	21%	28%	17%	14%
CT	6%	7%	6%	5%
NH	4%	7%	4%	4%
ME	2%	15%	3%	2%
RI	2%	3%	2%	2%
VT	2%	3%	2%	1%
Mid-Atlantic	51%	29%	51%	53%
NY	20%	14%	24%	22%
PA	14%	6%	12%	15%
NJ	11%	6%	8%	10%
MD	5%	2%	6%	5%
DE	1%	0%	1%	1%
DC	0%	0%	1%	1%
Canada	13%	9%	13%	19%

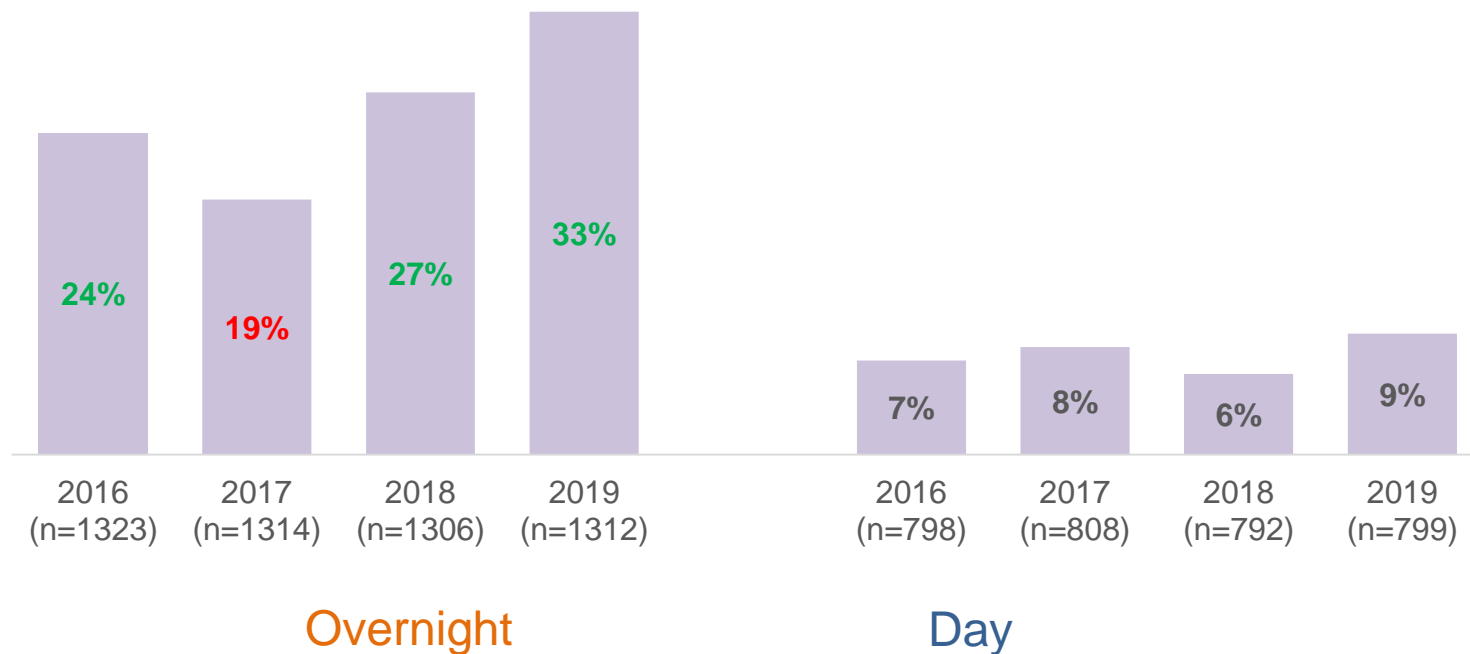
As in previous years, Massachusetts and Maine provided the lion's share of day travelers in the summer of 2019.

DAY TRAVELER RESIDENCE

	2016 (n=798)	2017 (n=808)	2018 (n=792)	2019 (n=799)
U.S.	86%	90%	90%	89%
MA	44%	36%	35%	36%
ME	24%	32%	36%	33%
NH	16%	19%	16%	16%
RI	1%	2%	2%	1%
VT	2%	1%	2%	3%
Canada	14%	10%	10%	11%

One out of three overnight visitors and one out of ten day visitors in the summer of 2019 were taking their first trip to the state. The share of first-time overnight visitors to Maine continued to grow in the summer of 2019.

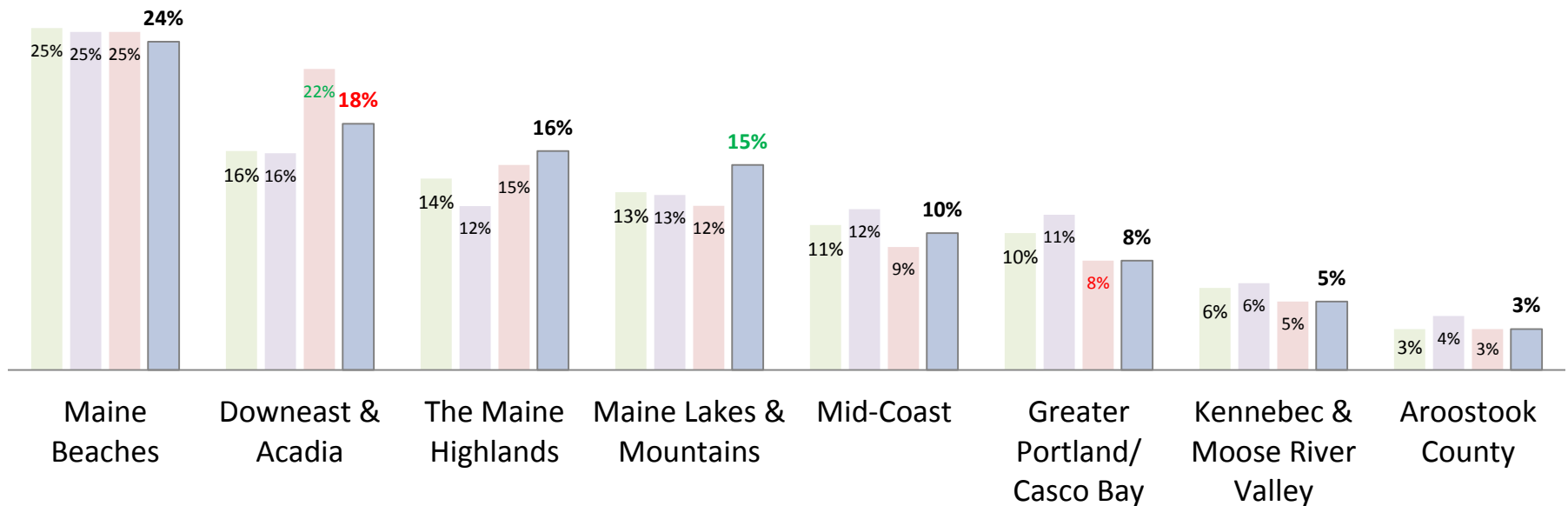
PROPORTION OF FIRST-TIME VISITORS TO MAINE



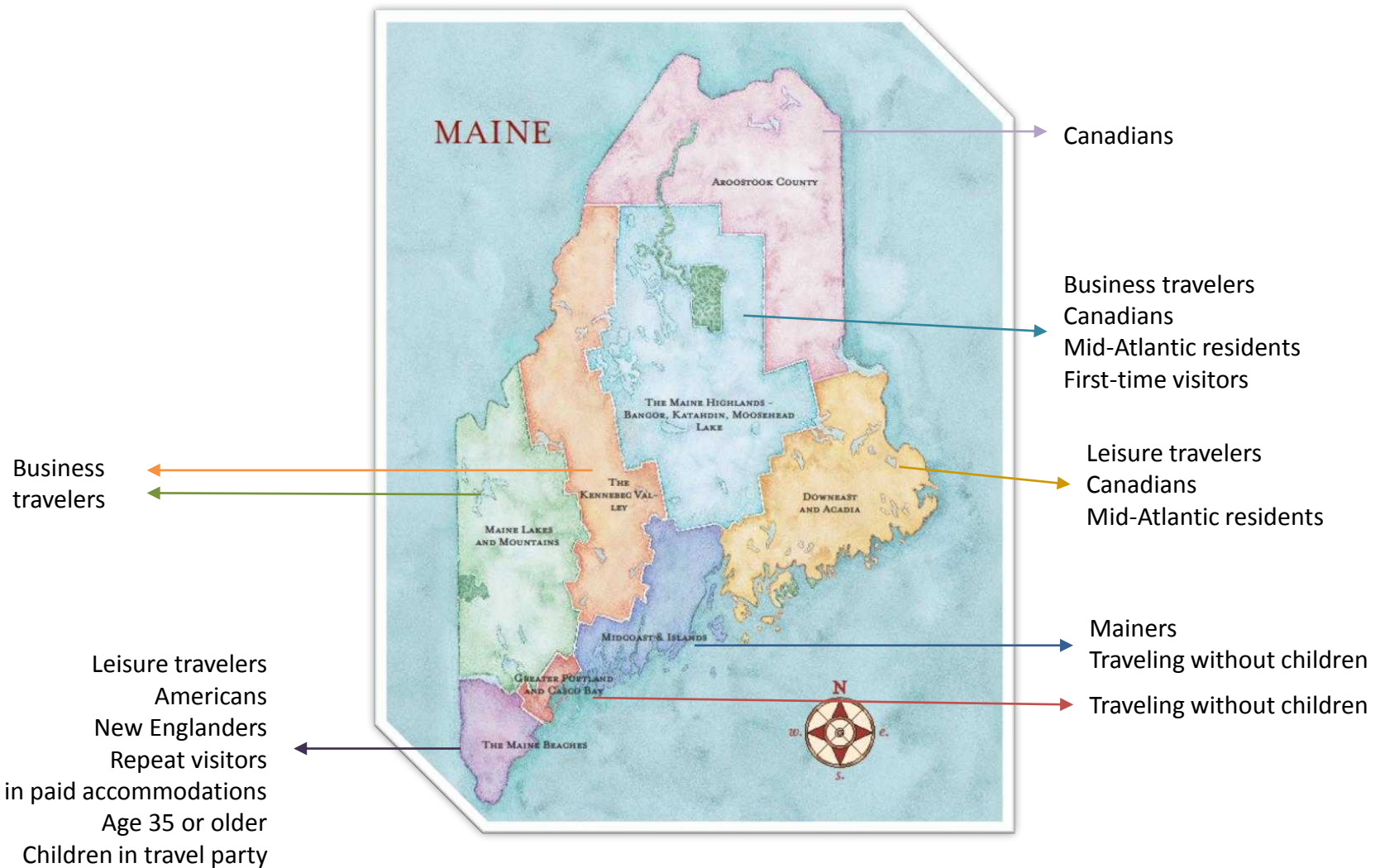
Maine's beaches remained the most popular regional destination for summer overnight trips in 2019, followed by Downeast & Acadia, the Highlands, and the Lakes & Mountains.

PRIMARY REGIONAL DESTINATION:
OVERNIGHT VISITORS

2016 (n=1323) 2017 (n=1314) 2018 (n=1306) **2019 (n=1312)**

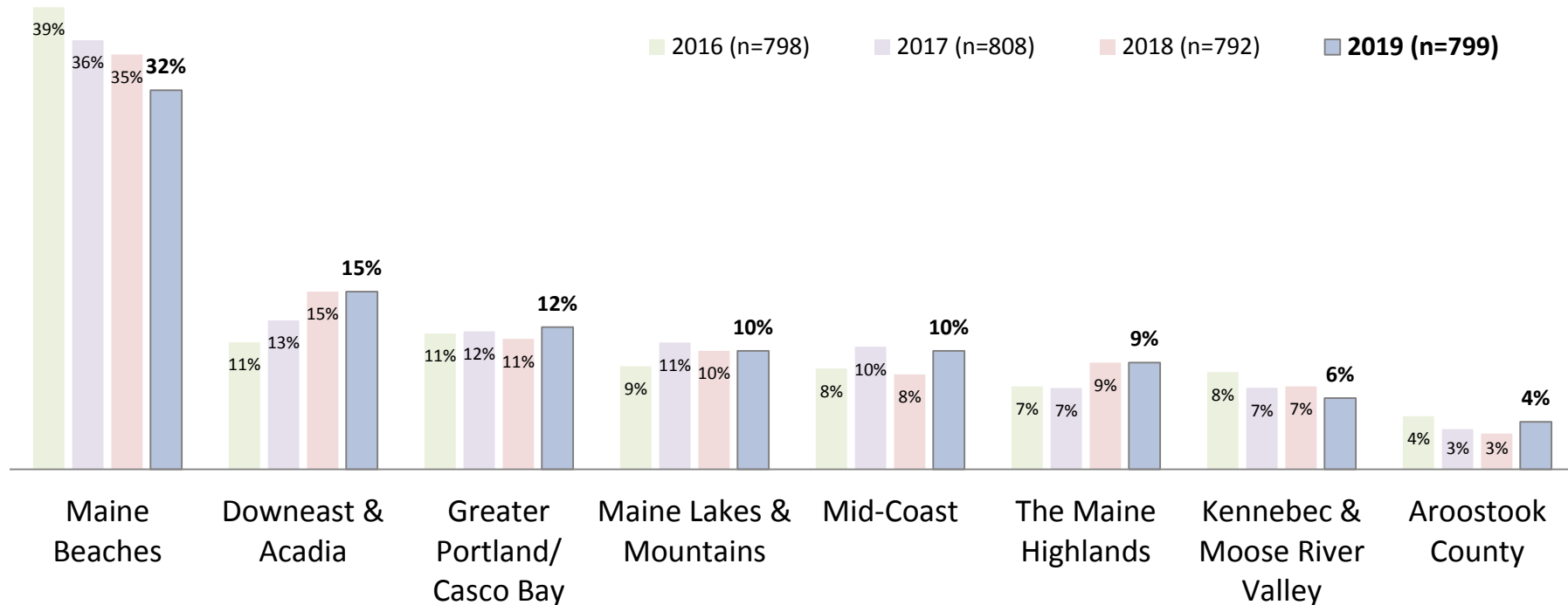


Certain regions are more popular among specific groups of overnight travelers.

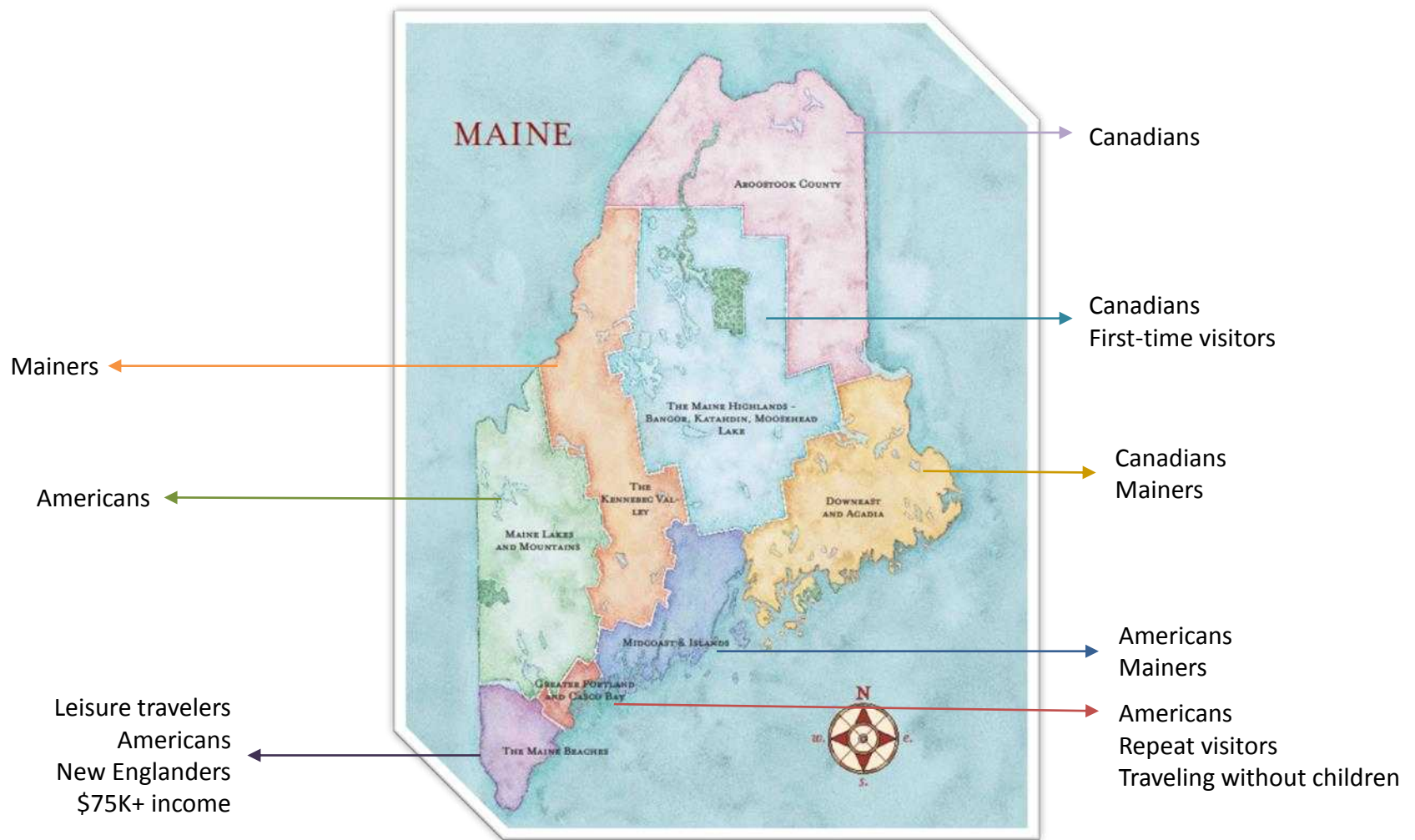


By a wide margin, the beaches region was the most popular primary destination for day visitors.

**PRIMARY REGIONAL DESTINATION:
DAY VISITORS**

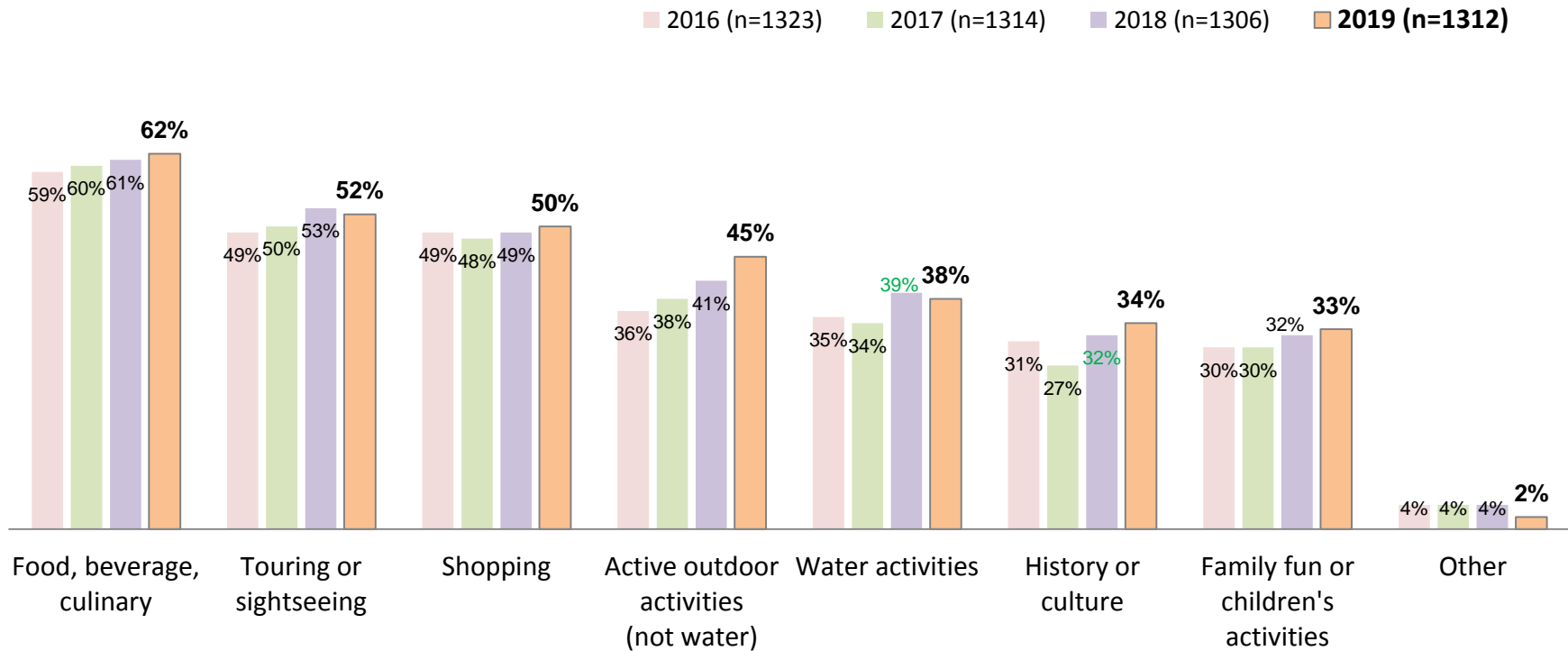


Specific subgroups of day visitors showed differential preferences for Maine's tourism regions.



Culinary activities remained the most popular interest area for Maine's summer 2019 visitors, followed by sightseeing, shopping, and active outdoor activities.

OVERNIGHT VISITORS: TRAVEL INTEREST AREAS

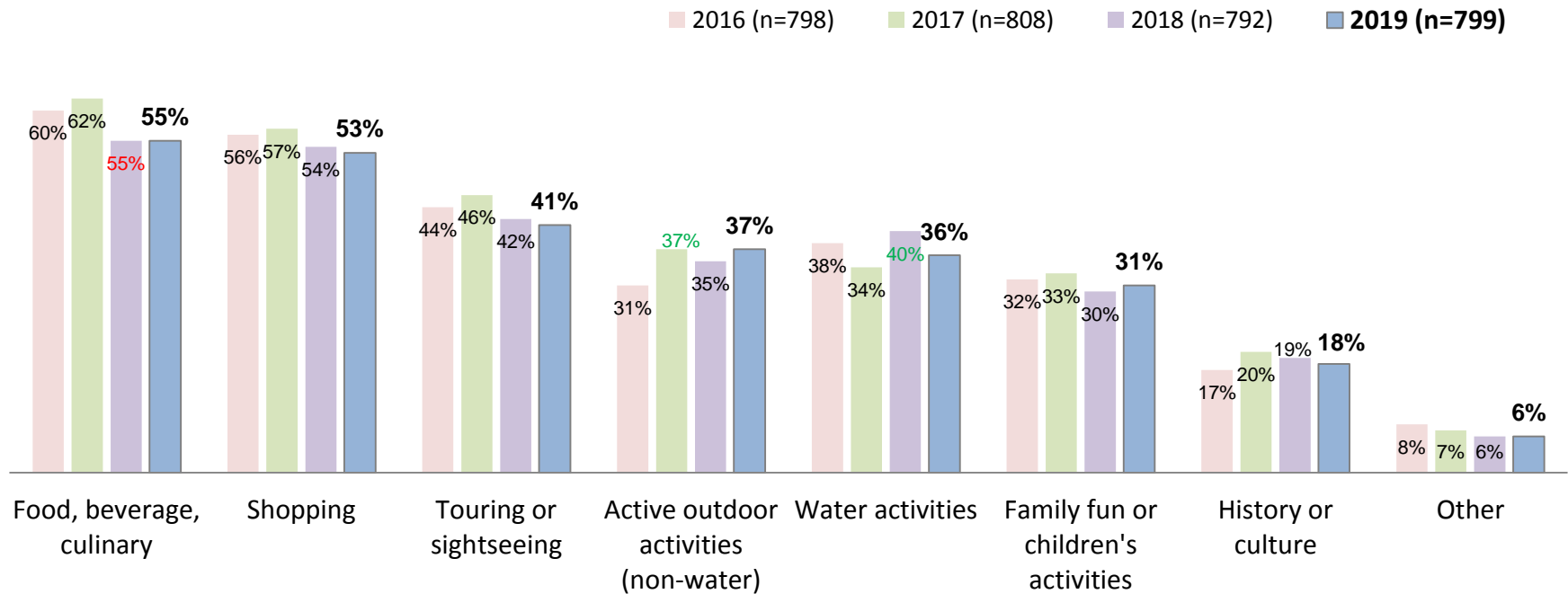


Specific interests were more popular with specific types of overnight visitors.

INTEREST AREA:	OVERNIGHT VISITORS MORE LIKELY TO BE INTERESTED
Food, beverage, culinary	Non-Mainers
Shopping	Canadians, Staying in paid accommodations
Touring or sightseeing	Mid-Atlantic residents, First-time visitors, Staying in paid accommodations, No kids on trip
Active outdoor activities (non-water)	Leisure travelers, Americans, Mid-Atlantic residents, Kids on trip, Younger than 45
Active outdoor water activities	Americans, New Englanders, Kids on trip, Younger than 45
History & culture	First-time visitors, Staying in paid accommodations
Family fun	Americans, New Englanders and Mid-Atlantic residents, Repeat visitors, Staying in unpaid accommodations, Kids on trip

Culinary activities and shopping were the most popular interest areas for day visitors in the summer of 2019, though sightseeing and outdoor activities were also popular.

**DAY VISITORS:
TRAVEL INTEREST AREAS**



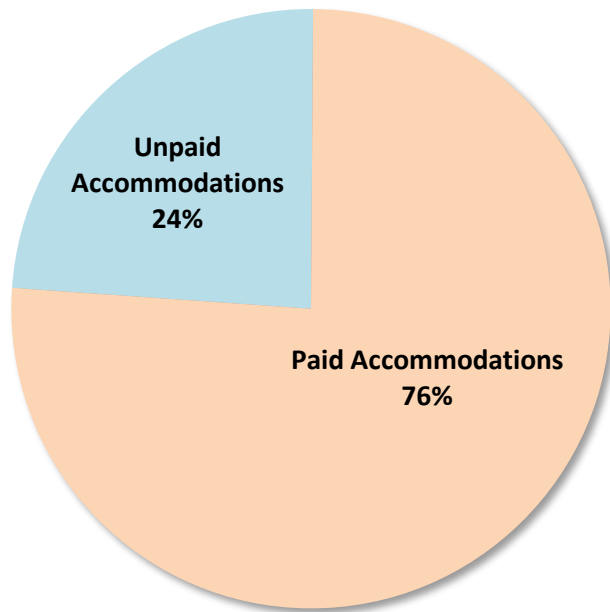
Different groups of day visitors were more likely to engage in specific interests.

INTEREST AREA:	DAY VISITORS
	MORE LIKELY TO BE INTERESTED
Shopping	Canadians Business travelers
Active outdoor activities (non-water)	Those younger than 55 Those traveling with children
Active outdoor water activities	Americans, New Englanders Younger than 35 Those traveling with children
History & culture	Mainers Canadians First-time visitors
Family fun	Americans Those traveling with children

Three out of four overnight visitors stayed in paid accommodations on their summer trip to Maine – generally hotels, motels, or resorts. The average overnight trip lasted roughly four nights.

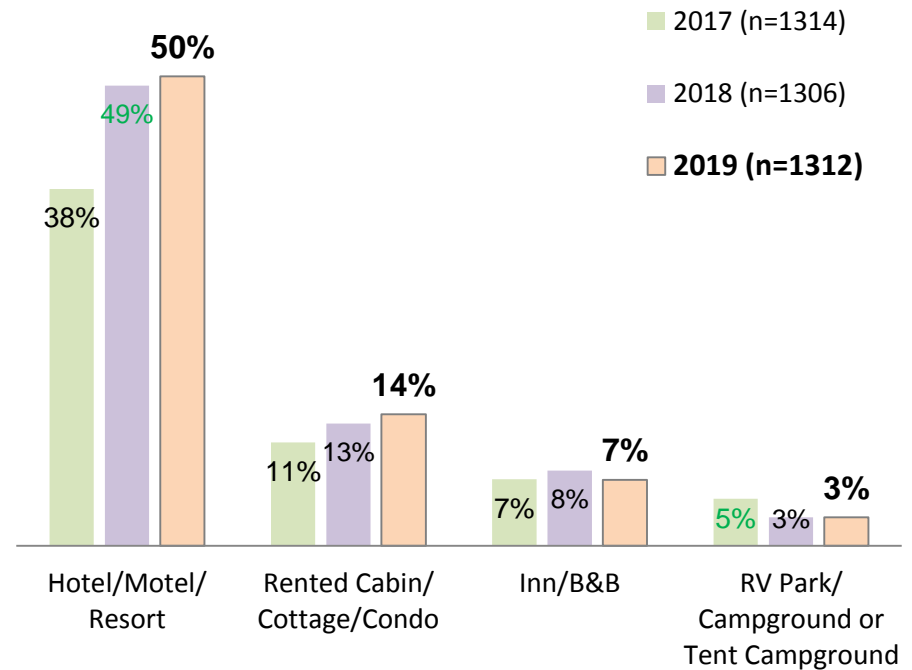
OVERNIGHT VISITORS:

TYPE OF ACCOMMODATION
(n=1312)



Average Length of Stay: 3.8 nights
Highest among those with incomes of \$75K or more and those traveling with children

TYPE OF PAID ACCOMMODATION

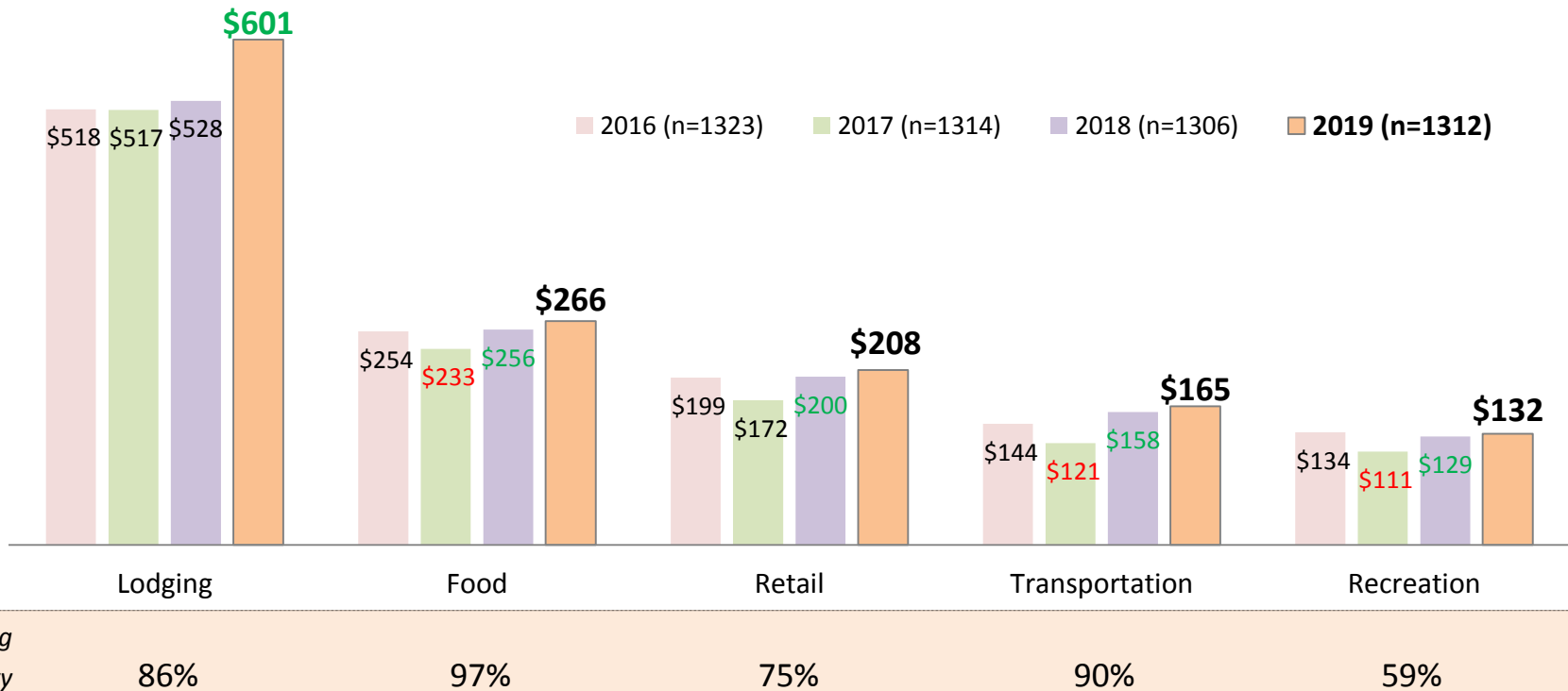


Lodging continued to make up the largest individual share of overnight spending, by a wide margin. Spending on lodging increased in the summer of 2019.

- Spending was highest among those traveling in the month of August.

OVERNIGHT VISITORS: TRIP SPENDING PER TRAVEL PARTY

(*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.

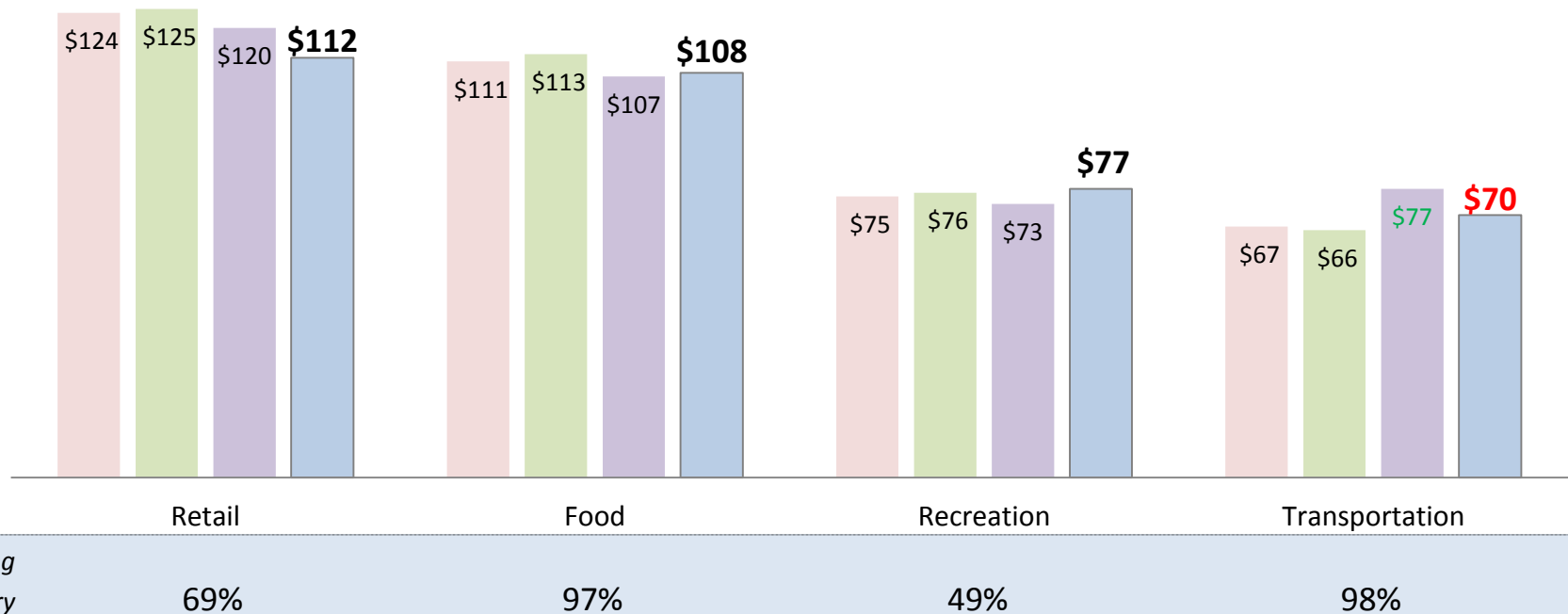
Travel parties visiting for the day spent as much on shopping as they did on food – spending more than \$100 on each.

- Day visitors traveling with children spent more, on average, than those traveling without kids.
- Spending was lowest among day visitors age 55 or older.

DAY VISITORS: TRIP SPENDING PER TRAVEL PARTY

(*Base: Visitors Who Spent Anything in the Category)

2016 (n=798) 2017 (n=808) 2018 (n=792) **2019 (n=799)**



*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



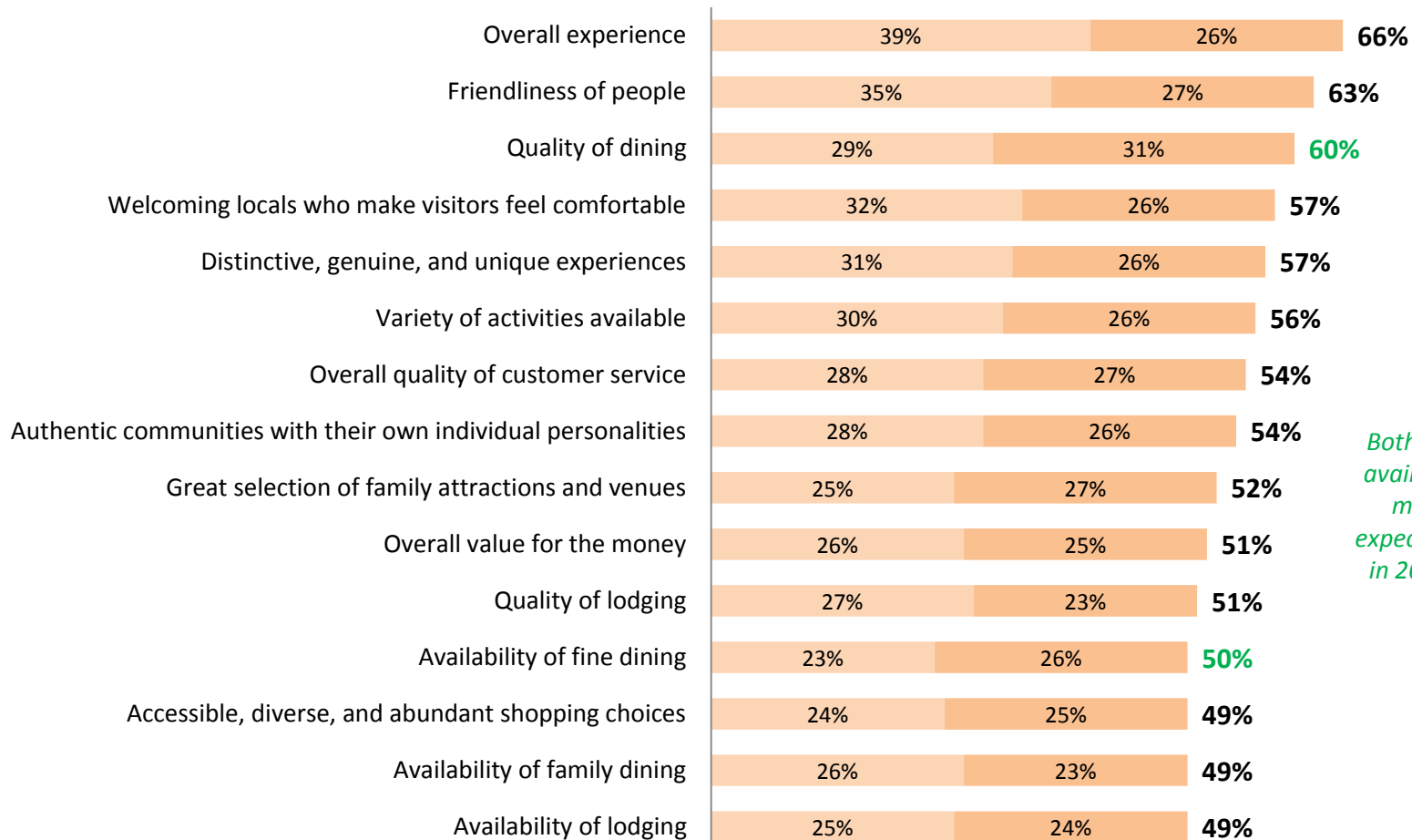
Two out of three overnight visitors say their overall experience in Maine exceeded their expectations. Each of 14 specific trip qualities exceeded expectations for half or more.

OVERNIGHT VISITORS: EVALUATION OF TRIP EXPECTATIONS

(n=1312)

Far exceeded expectations

Somewhat above expectations

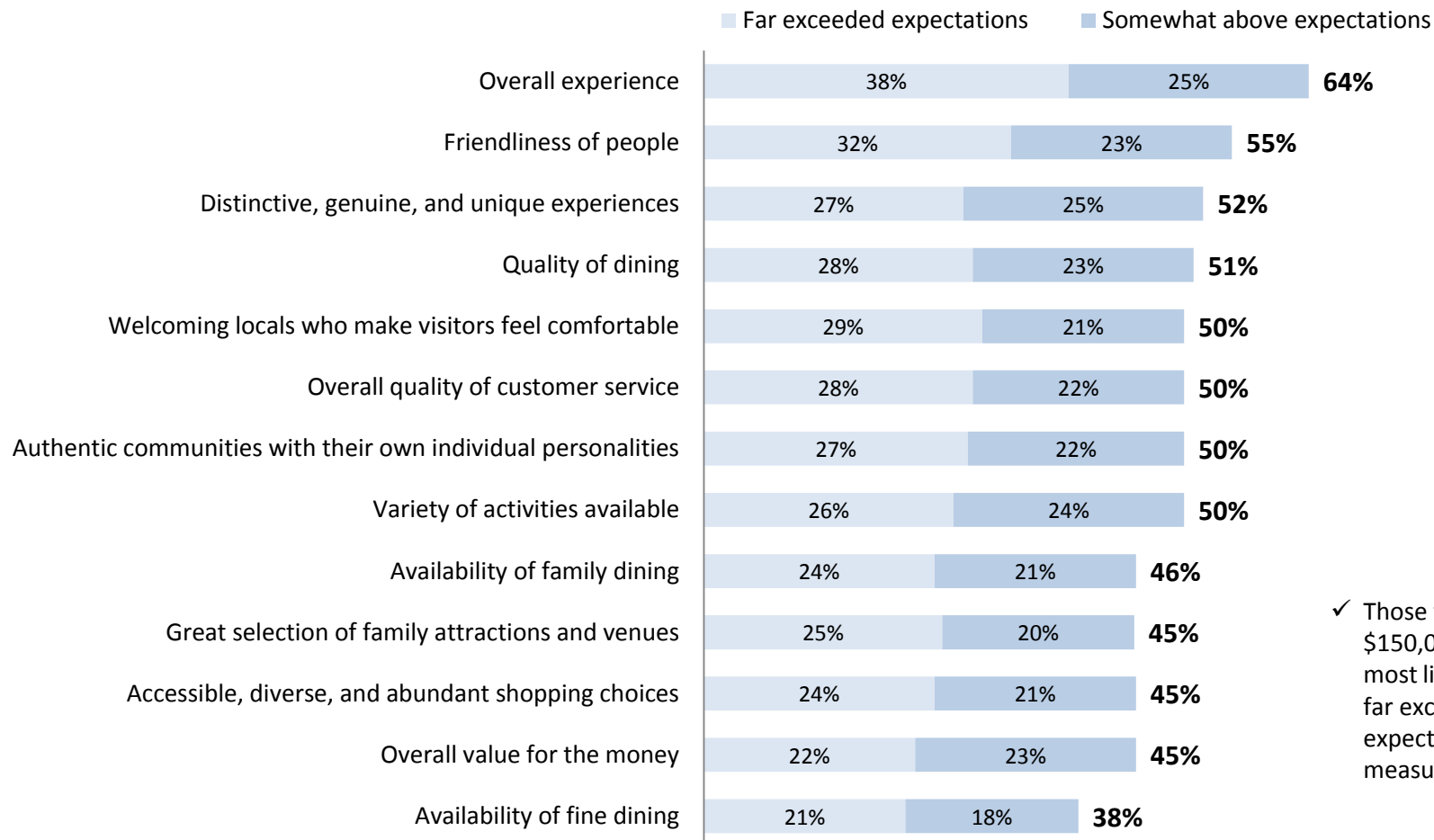


Both the quality of dining and availability of fine dining were more likely to exceed the expectations of summer visitors in 2019 than the year before.

Two out of three day visitors say their overall experience in the state exceeded their expectations. Most other, more specific areas exceeded the expectations of about half.

DAY VISITORS: EVALUATION OF TRIP EXPECTATIONS

(n=799)



✓ Those with incomes of \$150,000 or more were most likely to say the trip far exceeded their expectations on several measures.

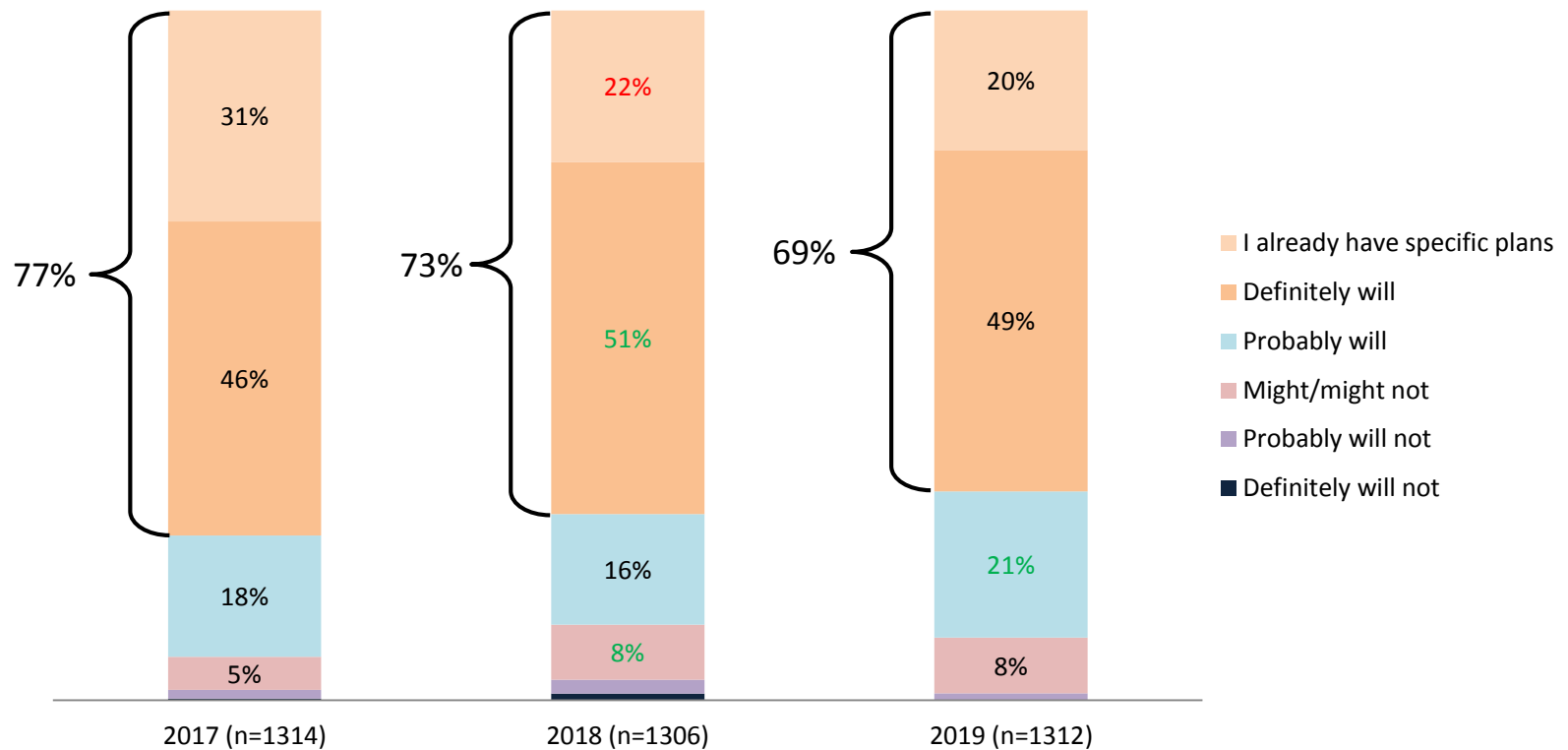
Future Travel



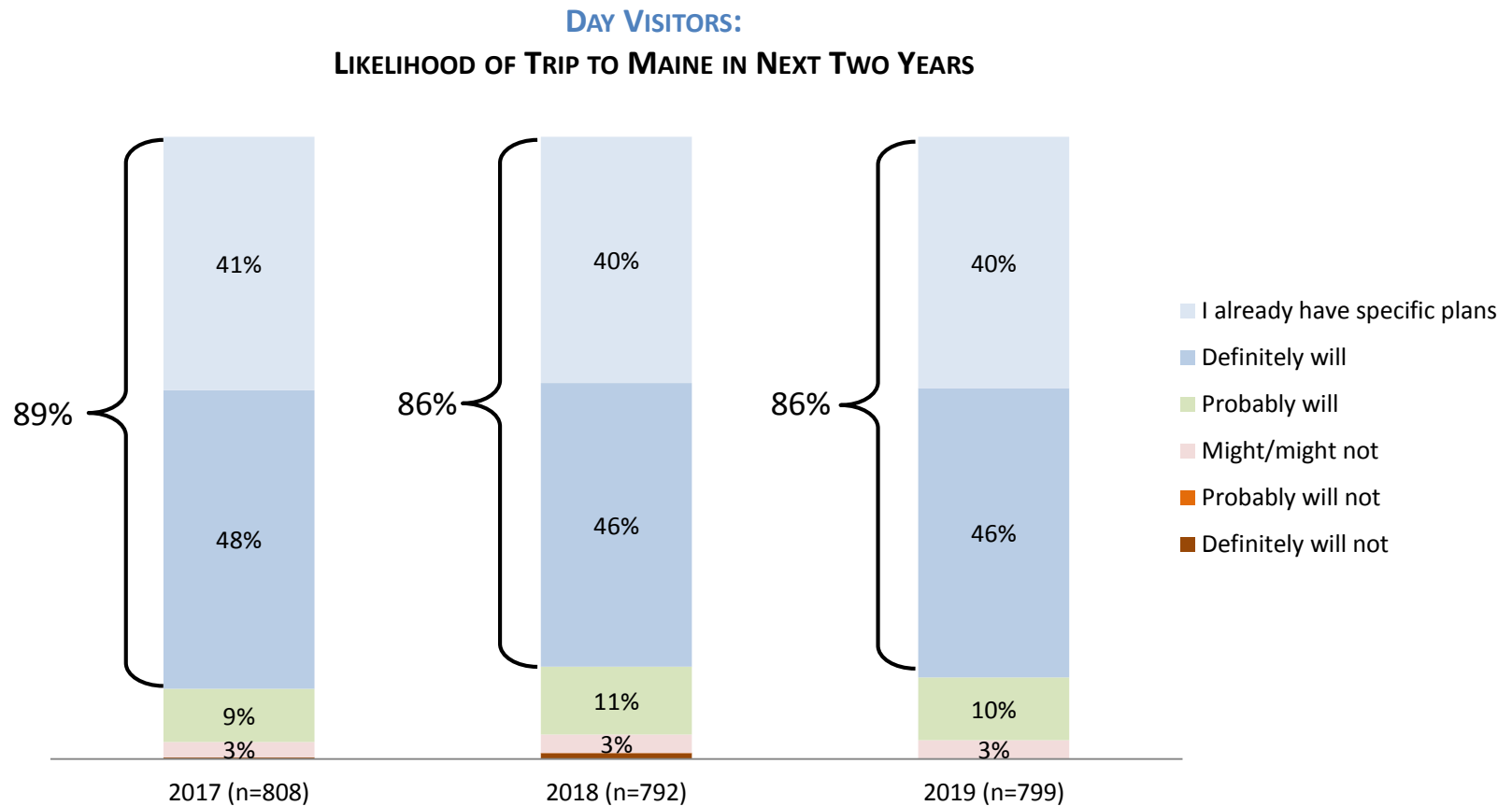
Seven out of ten overnight visitors say they will definitely return to the state or already have made specific plans to do so within the next two years.

- Those traveling with children and those between the ages of 45 and 54 are more likely than their counterparts to say they will return.

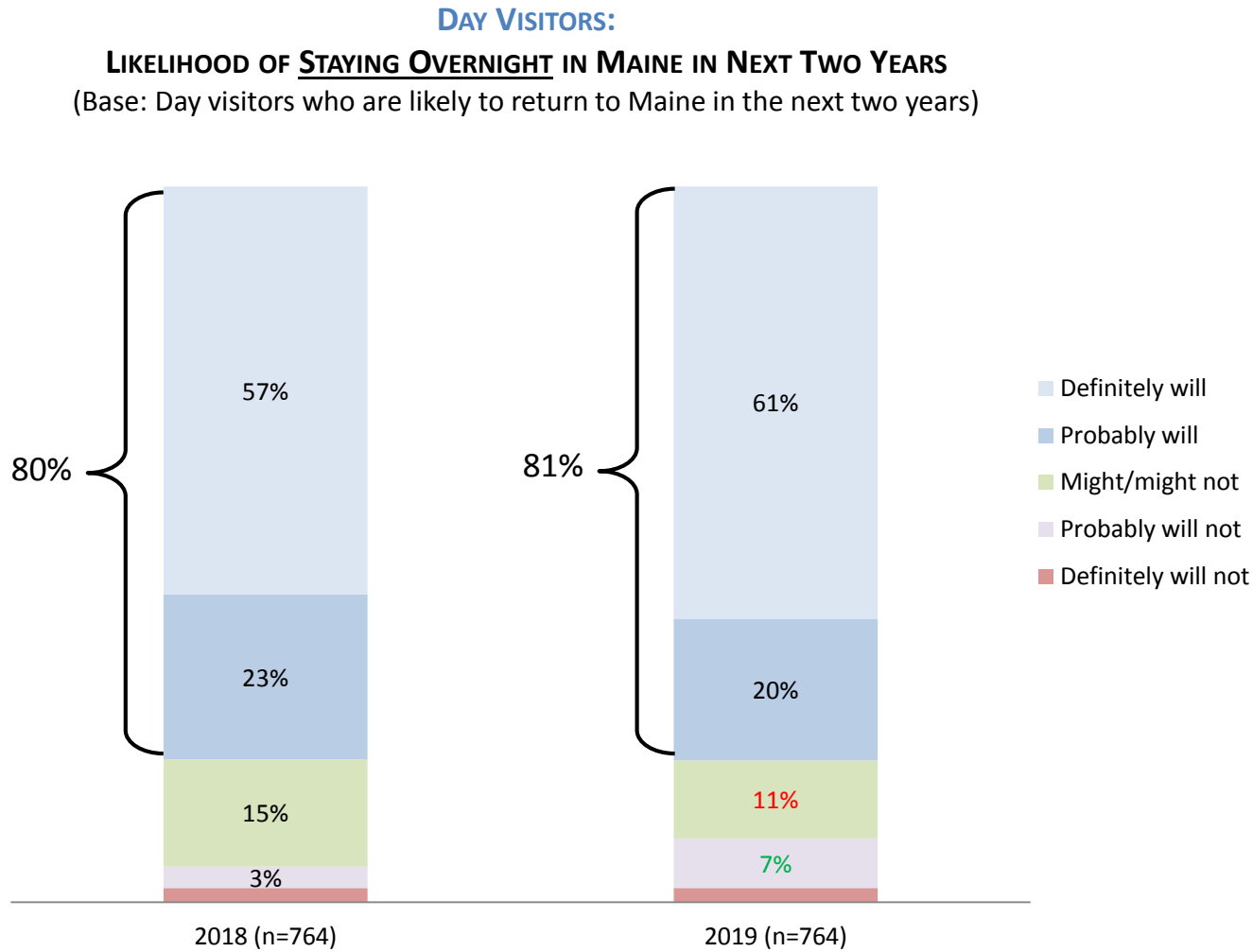
**OVERNIGHT VISITORS:
LIKELIHOOD OF TRIP TO MAINE IN NEXT TWO YEARS**



Almost nine out of ten summer day visitors either have specific plans to return to Maine or definitely will visit again in the next two years.

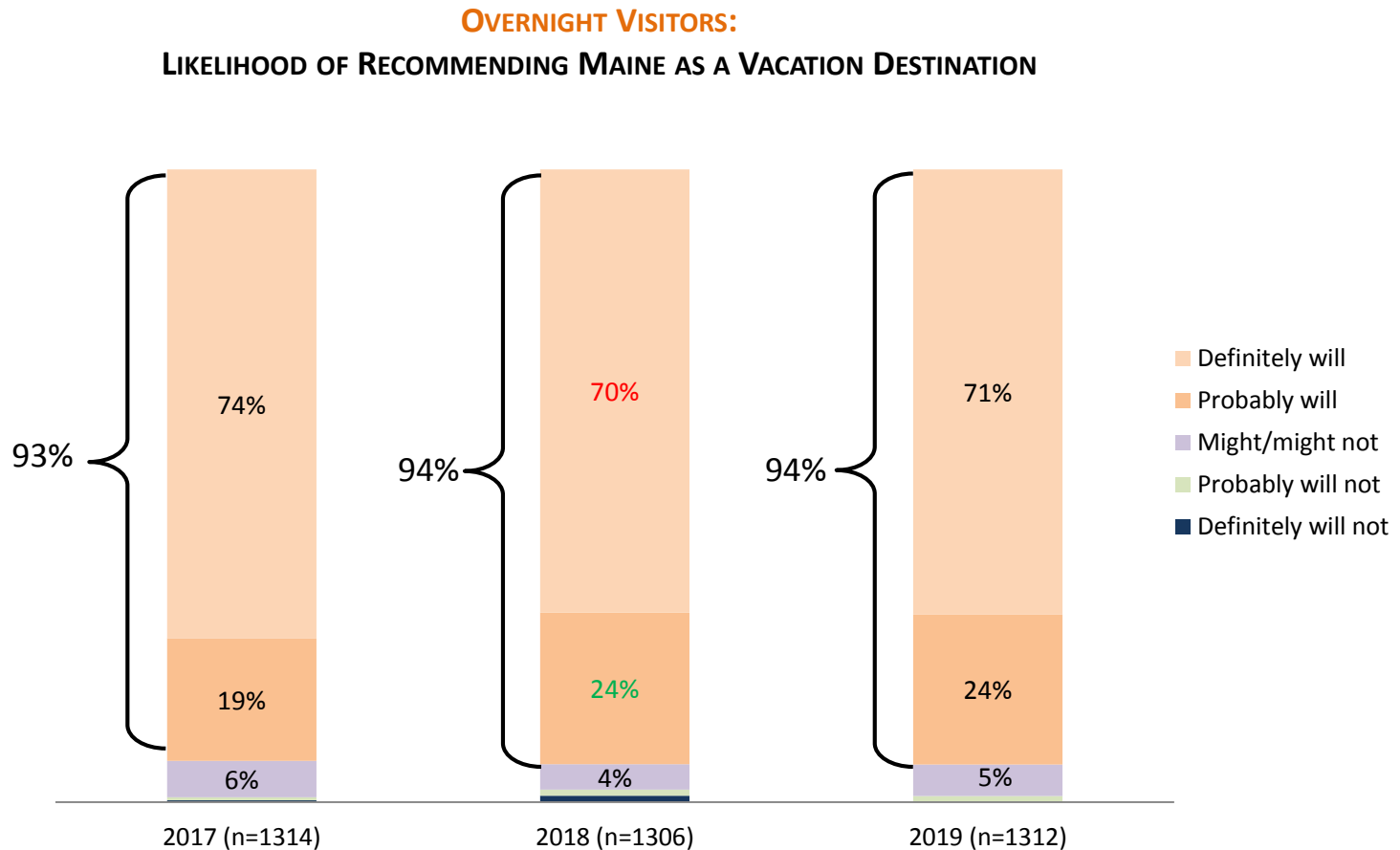


Eight out of ten day visitors who will return to Maine are likely to stay overnight.



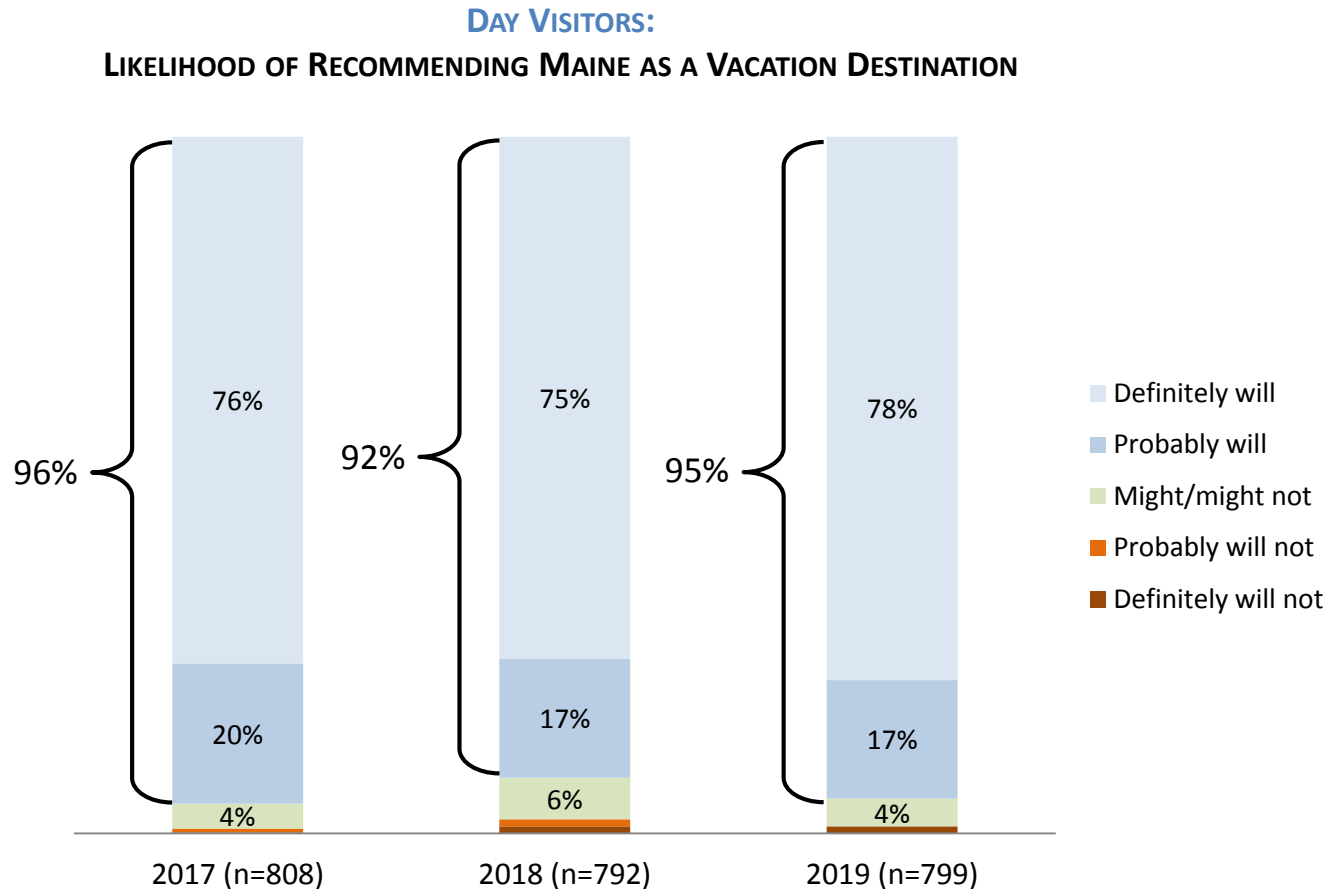
Almost all overnight visitors would recommend Maine as a vacation destination.

- Visitors age 45 or older are more likely than younger visitors to recommend Maine.



Almost all day visitors would recommend a vacation in Maine.

- Those who earn \$150,000 or more are particularly likely to say they would definitely recommend Maine.



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.
- DPA added the questions required for the Segment Typing Tool to the Visitor Profile questionnaire and began collecting this supplemental data in January 2015. We use this classification scheme to compare the perceptions, travel behaviors, and future travel intentions of visitors among the agency targeted segments.

Visitor Segment Analysis: Background

- 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**
- This Appendix provides a topline profile and comparison of these priority segments as they relate to Maine's 2019 summer season visitors.

As in previous summers, visitors to Maine in 2019 were generally either Balanced Achievers or Genuine Originals.

SUMMER VISITOR SEGMENTS

	Overnight Visitors			Day Visitors		
	2017 (n=1314)	2018 (n=1306)	2019 (n=1312)	2017 (n=808)	2018 (n=792)	2019 (n=799)
Balanced Achievers	31%	40%	42%	28%	32%	29%
Genuine Originals	34%	29%	28%	30%	34%	37%
Social Sophisticates	10%	9%	9%	7%	7%	8%

Visitor Segment Analysis: Overnight Visitor Highlights

Balanced Achievers



More likely than others to be residents of Mid-Atlantic states. More likely to have arrived by airplane.

Most likely to be on their first visit to Maine.

Most likely to be visiting the Maine Highlands region.

On average, have larger travel parties and are more likely to be traveling with children. More likely to be interested in family activities and be on a holiday trip.

Spent most, on average, overall and on lodging and recreation.

Most likely to say they would return in two years and give consistently higher ratings of their trip.

Genuine Originals



Older than other priority segments, on average.

Least likely to be on a business trip.

More likely than Balanced Achievers to be seeking outdoor recreation and to participate in non-water outdoor activities.

Least likely to be interested in shopping.

Most likely to be visiting the Downeast & Acadia region.

Most likely to be staying at an RV park or campground.

Social Sophisticates



More likely than Balanced Achievers to visit the Maine Beaches and the Greater Portland & Casco Bay regions. Also more likely to be interested in foods and beverages.

Least likely to recommend Maine (but still do so at a high level).

Least likely to be interested in history and culture.

Visitor Segment Analysis: Day Visitor Highlights

Balanced Achievers



Most likely to be on first visit to Maine.

Most likely to use shared, peer-to-peer networks with travel.

More likely than Genuine Originals to rate trip as exceeding expectations across several measures.

Genuine Originals



Highest average age.

Least likely to be residents of Massachusetts.

Most likely to be retired and traveling without children.

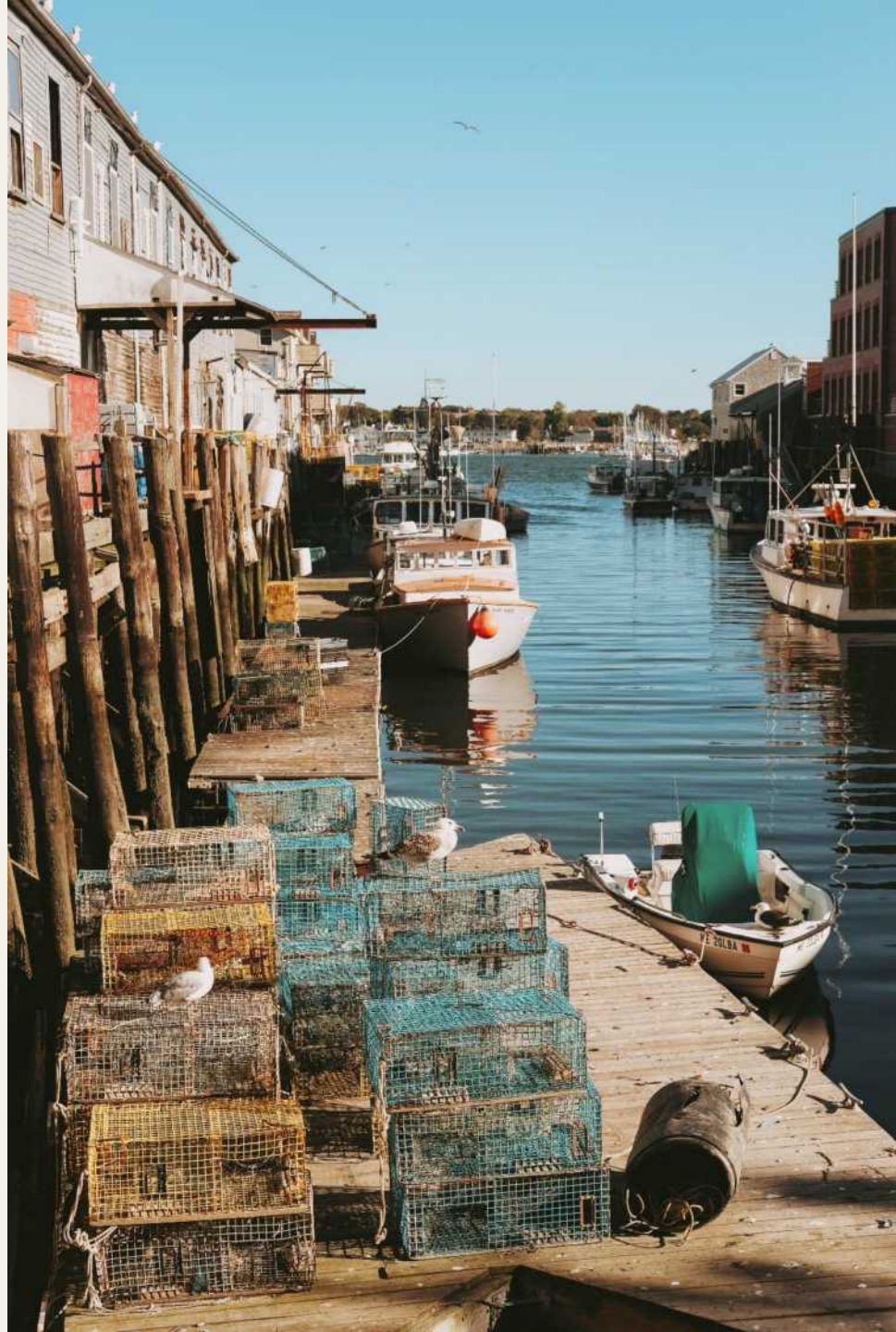
Social Sophisticates



Most likely to be employed full-time and have the highest average incomes.

Least likely to visit Downeast & Acadia region.

Research Objectives and Methodology



Research Objectives and Instruments

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

Research Objectives:	Survey Instruments		
	National Travel Survey	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 Travel Survey

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

Overnight Visitor

- 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

- 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 provides results from the Summer 2019 travel season, describing travel that occurred from May through August of 2019.
- Summer data collection occurred monthly between June 2nd and September 23rd, 2019. The number of completed surveys collected from each component of the research program is as follows:

Research Component	Completed Summer Season Surveys
National Travel Survey	12,209
Overnight Visitor Survey	1,312
Day Visitor Survey	799

- Statistical significance between subgroups was calculated at the 95% confidence level, and noteworthy differences are noted throughout the report. Statistically significant differences across years are also highlighted. A statistically significant **increase** from the previous year is indicated by **green**, and a significant **decrease** from the previous year is indicated with **red**.



172 Commercial Street
Portland, ME 04101
207.985.7660

www.digitalresearch.com