

Maine Office of Tourism Visitor Tracking Research

Winter 2012/2013 Seasonal Topline

Prepared by



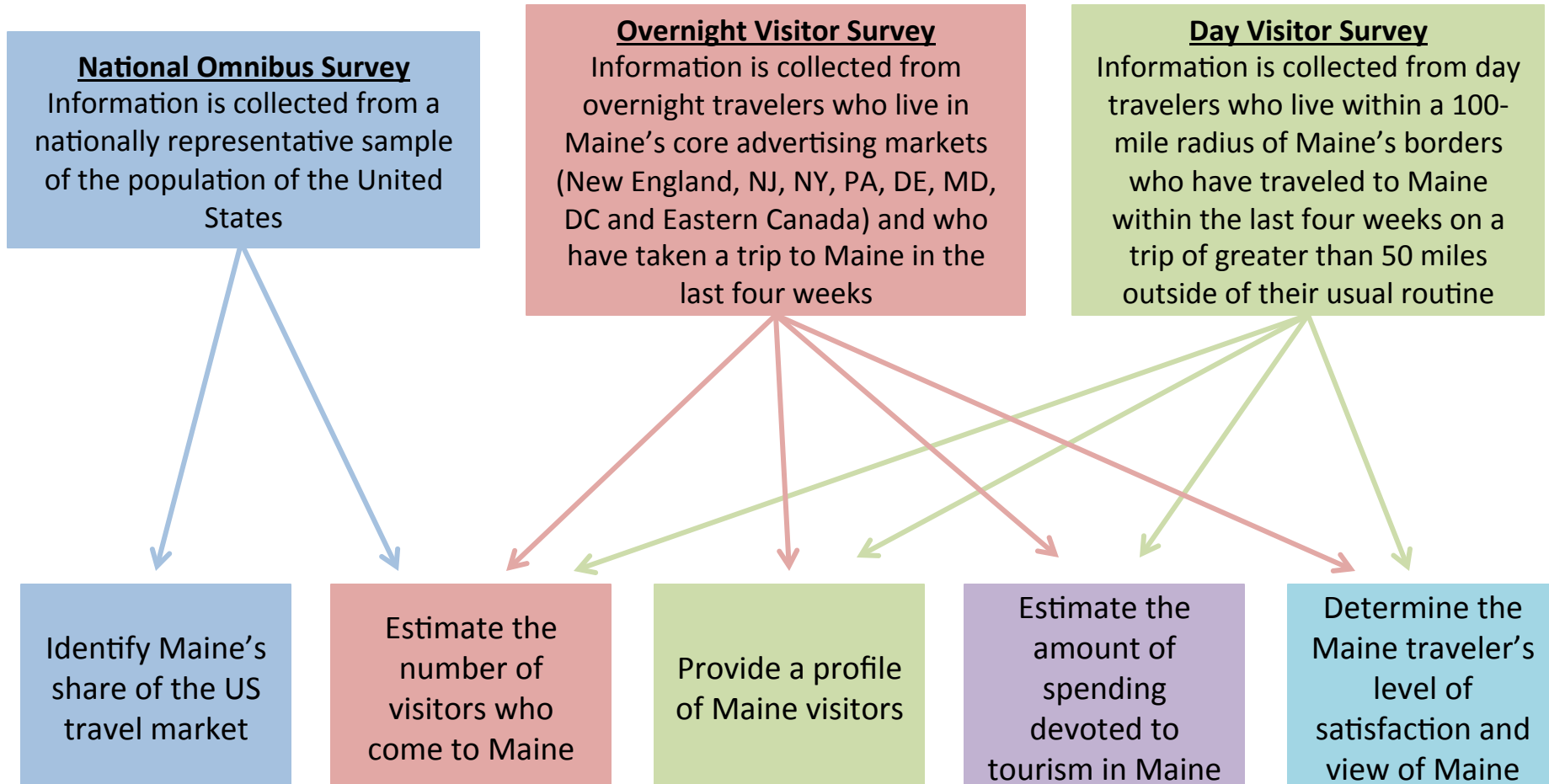
July 2013

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 December 2012 through April 2013. At the conclusion of the 2013 travel reporting season (December 2013), adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

- After experiencing a drop between the 2011 and 2012 winter seasons, travel nationwide from December 2012 to April 2013 was stable with the 2011/2012 winter season. Maine fared even better, with an increase in tourism-related visitation to the State for both overnight and day visitors during this most recent winter season. The only segment exhibiting a decrease in winter travel year-over-year is *tourism-related overnight business* travel, a segment particularly impacted by the heavy snow experienced in the Northeast during this time period.
- Following on a trend illustrated in the Summer 2012 and Fall 2012 seasons, Winter 2012/2013 also showed an increase in overnight visitation from Canada as compared with Winter 2011/2012.

Executive Summary

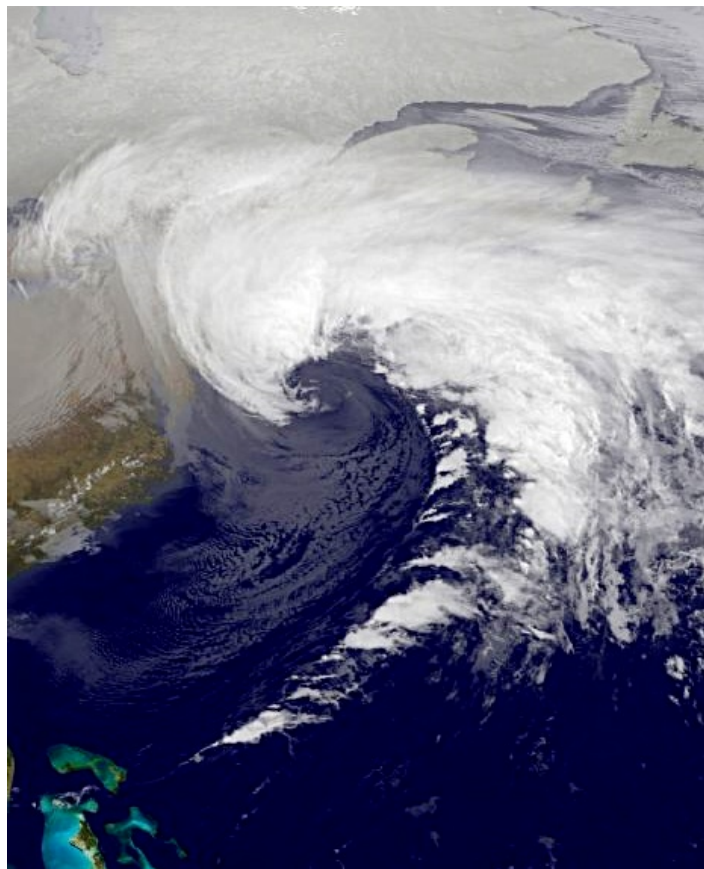
- Trending upwards in prior years, the proportion of overnight visitors staying in paid accommodations showed an increase once again, with 65% of Winter 2012/2013 overnight visitors paying for their lodging. Preliminary analysis points to a possible connection between this increase in paid accommodations and the increase in Canadian visitation, as Canadian visitors are more likely to stay in paid accommodations than are their U.S. counterparts.
- Consistent with last winter, first-time visitors account for about one in ten of Maine's overnight visitors and fewer than 5% of day visitors.
- Maine continues to receive favorable evaluations from its visitors, with the *overall experience* and the *friendliness of the people* still being rated highest by visitors, and more than nine in ten visitors indicating that they will likely recommend a Maine vacation to a friend or family member.

2012/2013 Winter Season Travel Context



National Weather – Nor’easter “Nemo”

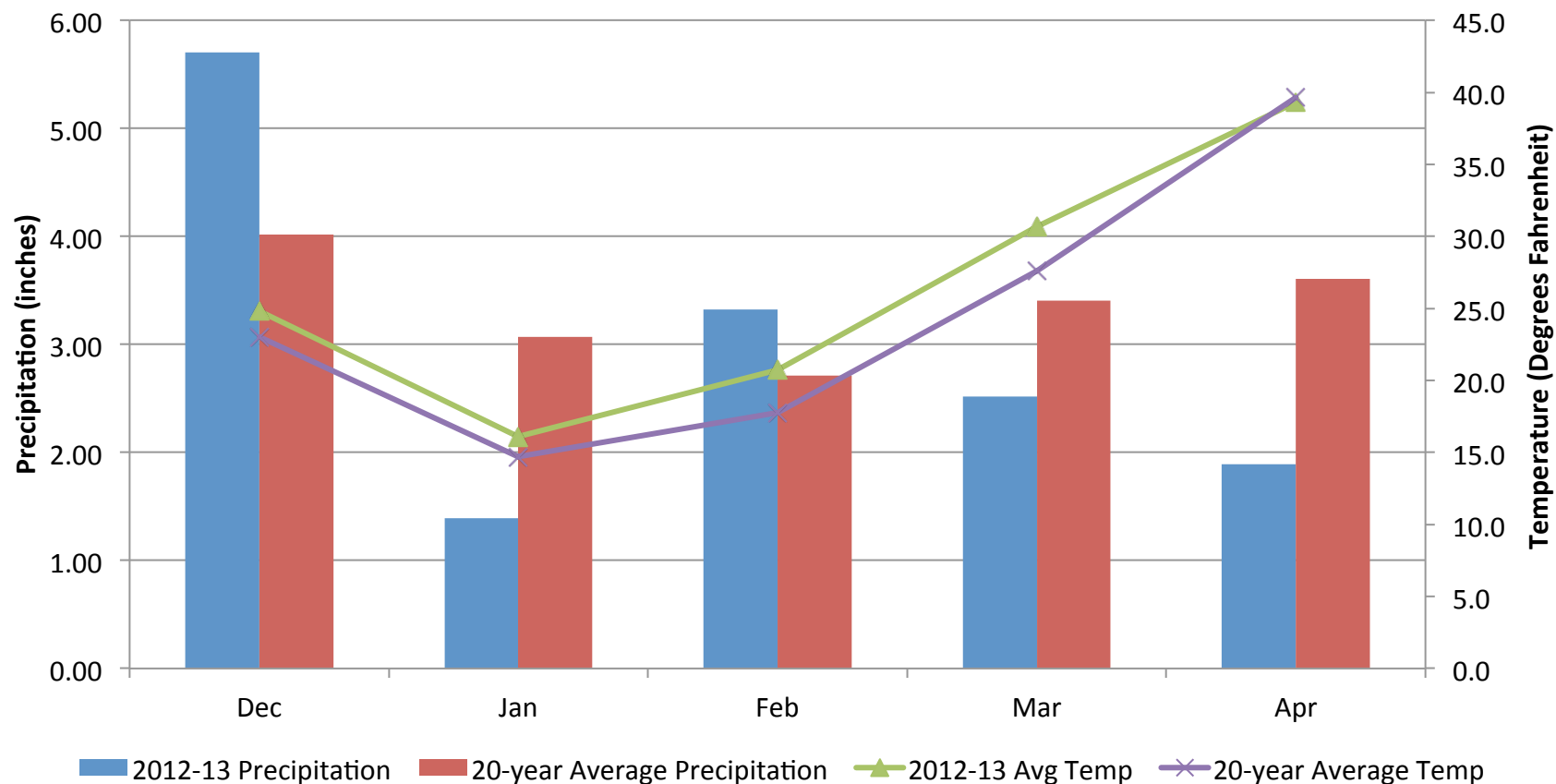
- During February 2013, nor’easter “Nemo” hit the Northeast, bringing high winds and dumping snow across the northern part of the United States and parts of eastern Canada.



Maine Weather

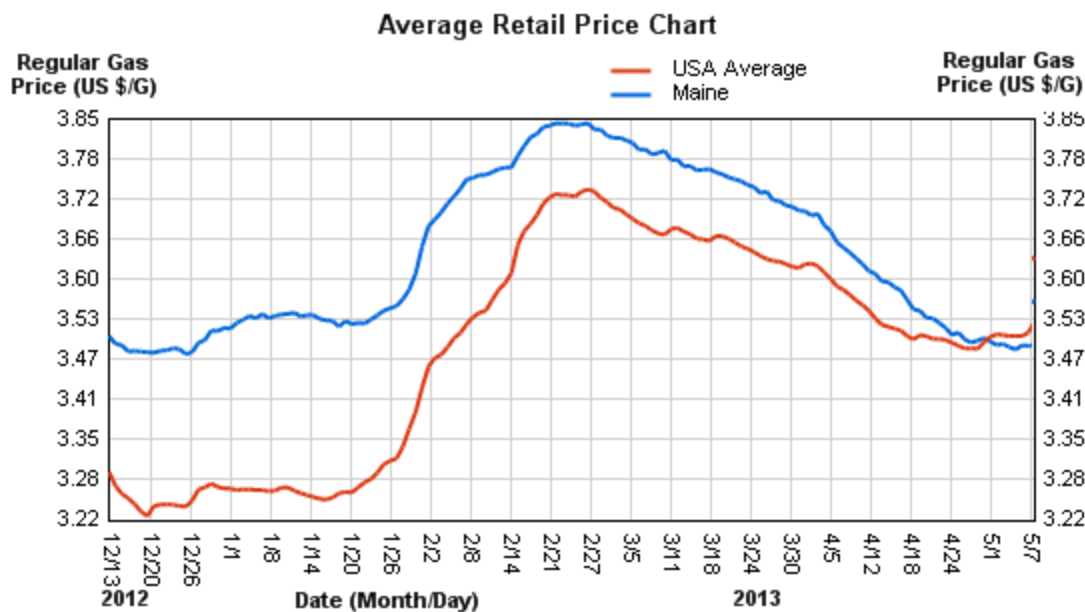
- Maine experienced above average amounts of precipitation during the months of December 2012 and February 2013, with January, March, and April showing below average amounts of precipitation. Temperatures during the winter of 2012/2013 were slightly above average.

Precipitation and Temperature – Maine Winter 2012-2013



Gas Prices

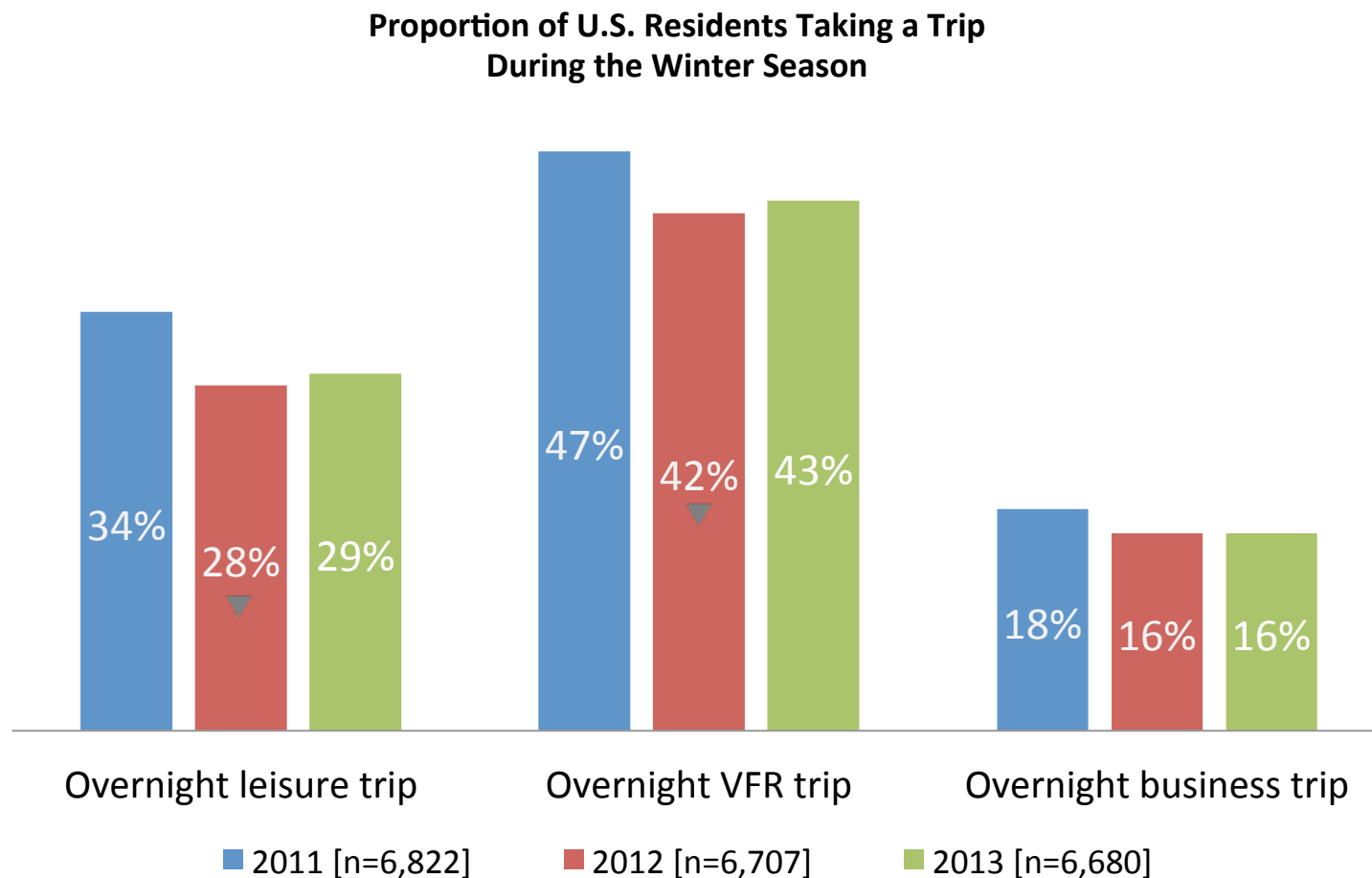
- The average price of gasoline in Maine during the winter of 2012/2013 surpassed the US average, steadily rising and then peaking in mid-February. A slow decline followed, with Maine prices meeting the US average by the end of April.



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National Travel Context

- After dropping from 2011 to 2012, the proportion of US residents traveling during the Winter 2012/2013 season has remained steady.

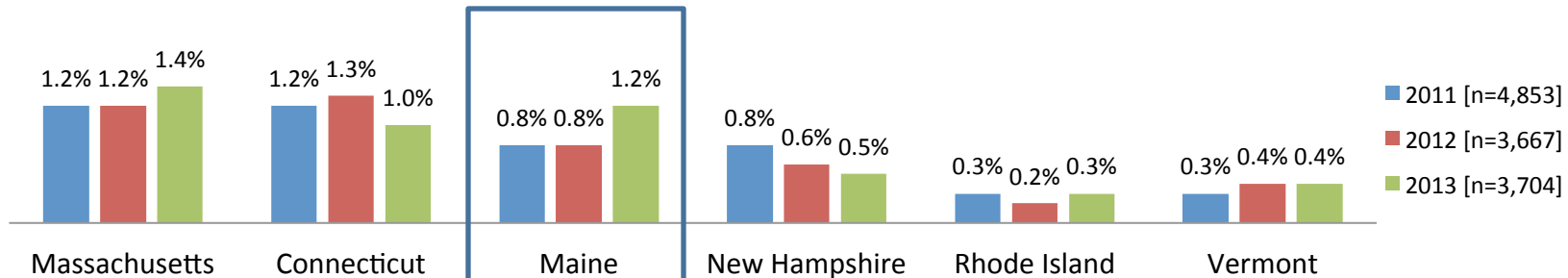


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

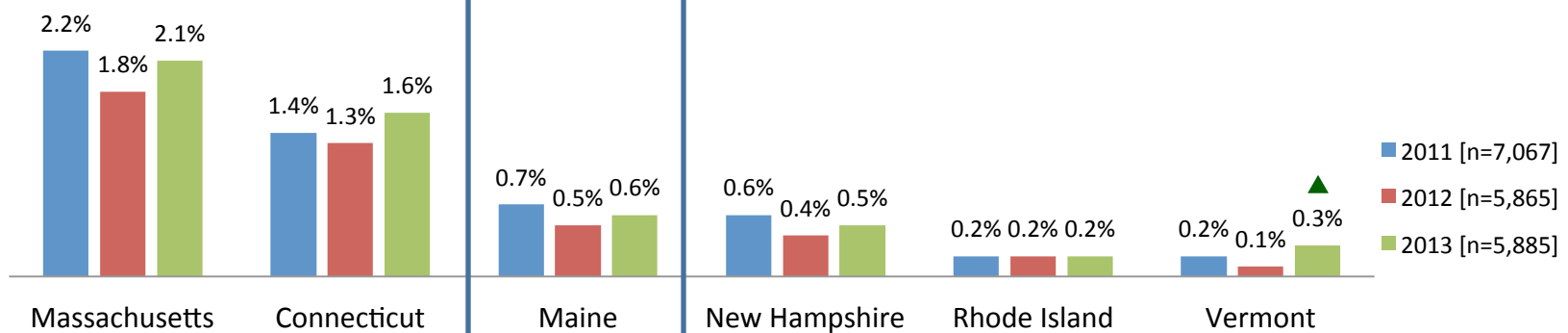
▲▼ notes significant difference between 2012 and 2013 at the 95% confidence level

Maine's Market Share

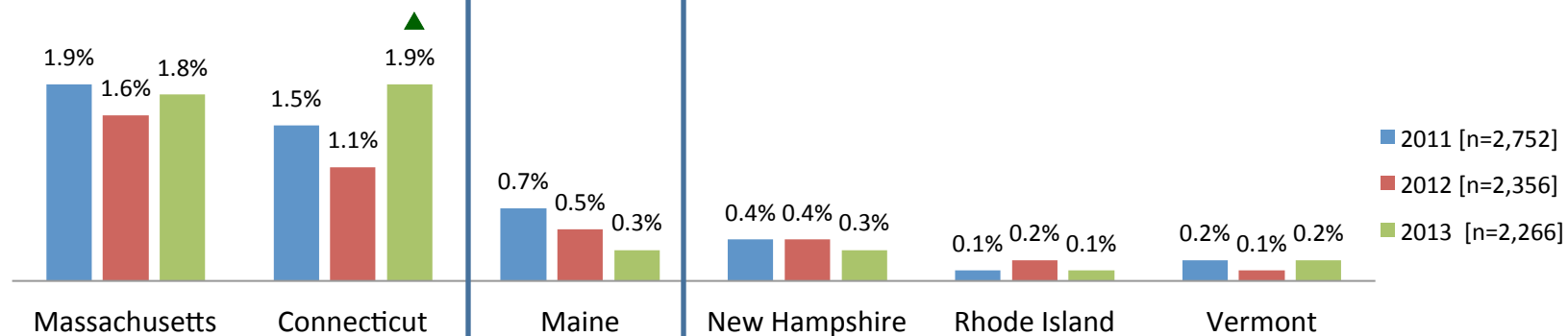
Overnight Leisure Trips



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 2012 and 2013 at the 95% confidence level

2012/2013 Winter Season Highlights



Estimated Winter Visitation to Maine*

Note: Visitation estimates provided here are preliminary and reflect visitation from December 2012 through April 2013. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

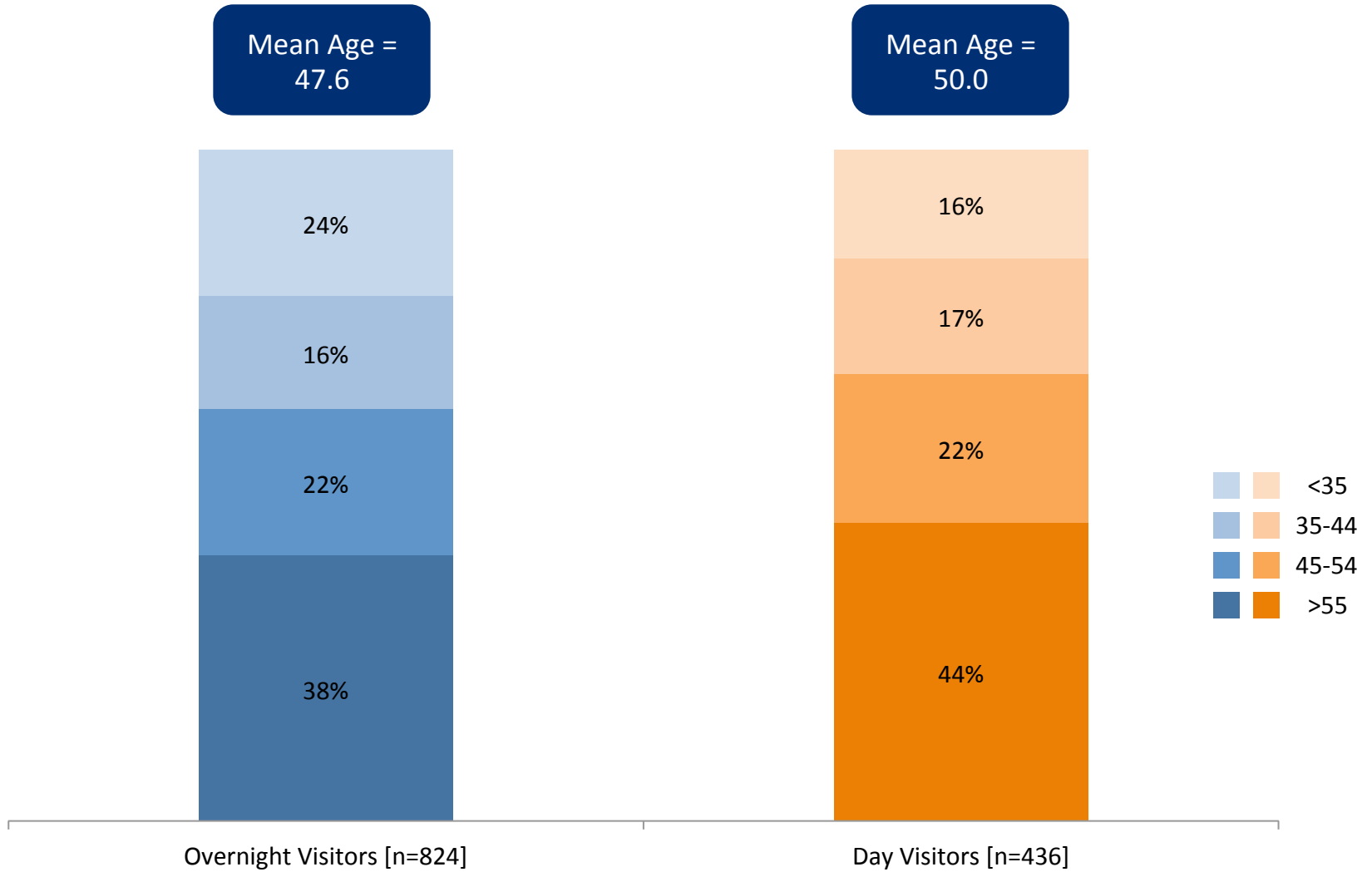
Estimates	Winter 2011/2012	Winter 2012/2013	% Chg
Overnight Visitors	2,525,782	2,893,077	14.5%
Leisure	1,572,042	1,799,203	14.5%
VFR	807,821	1,009,188	24.9%
Business	145,919	84,686	-42.0%
Day Visitors	1,979,971	2,285,169	15.4%
Leisure	1,238,024	1,419,092	14.6%
VFR	614,701	686,259	11.6%
Business	127,246	179,818	41.3%

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

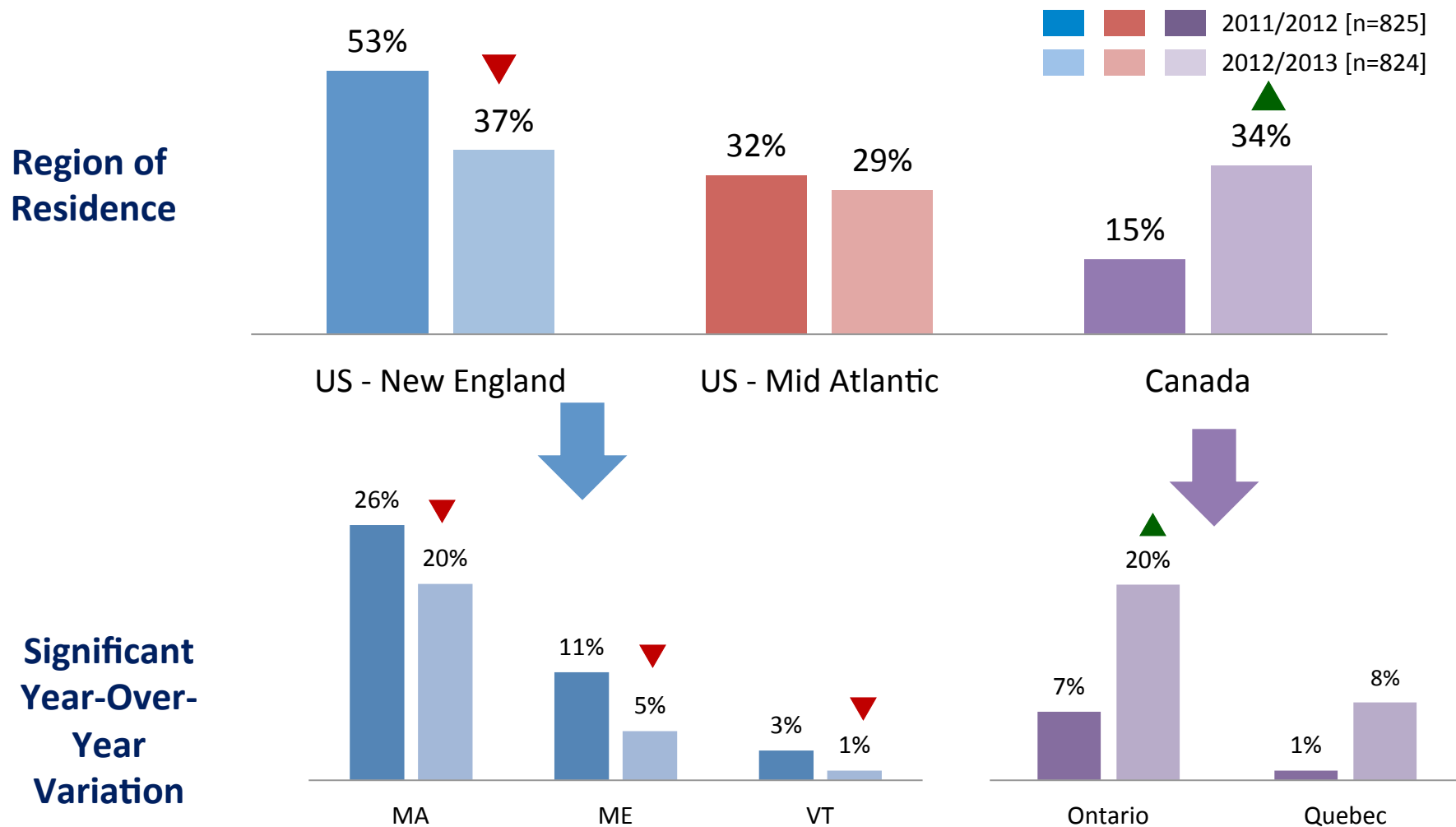
Tourism related trips include:

- *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.*

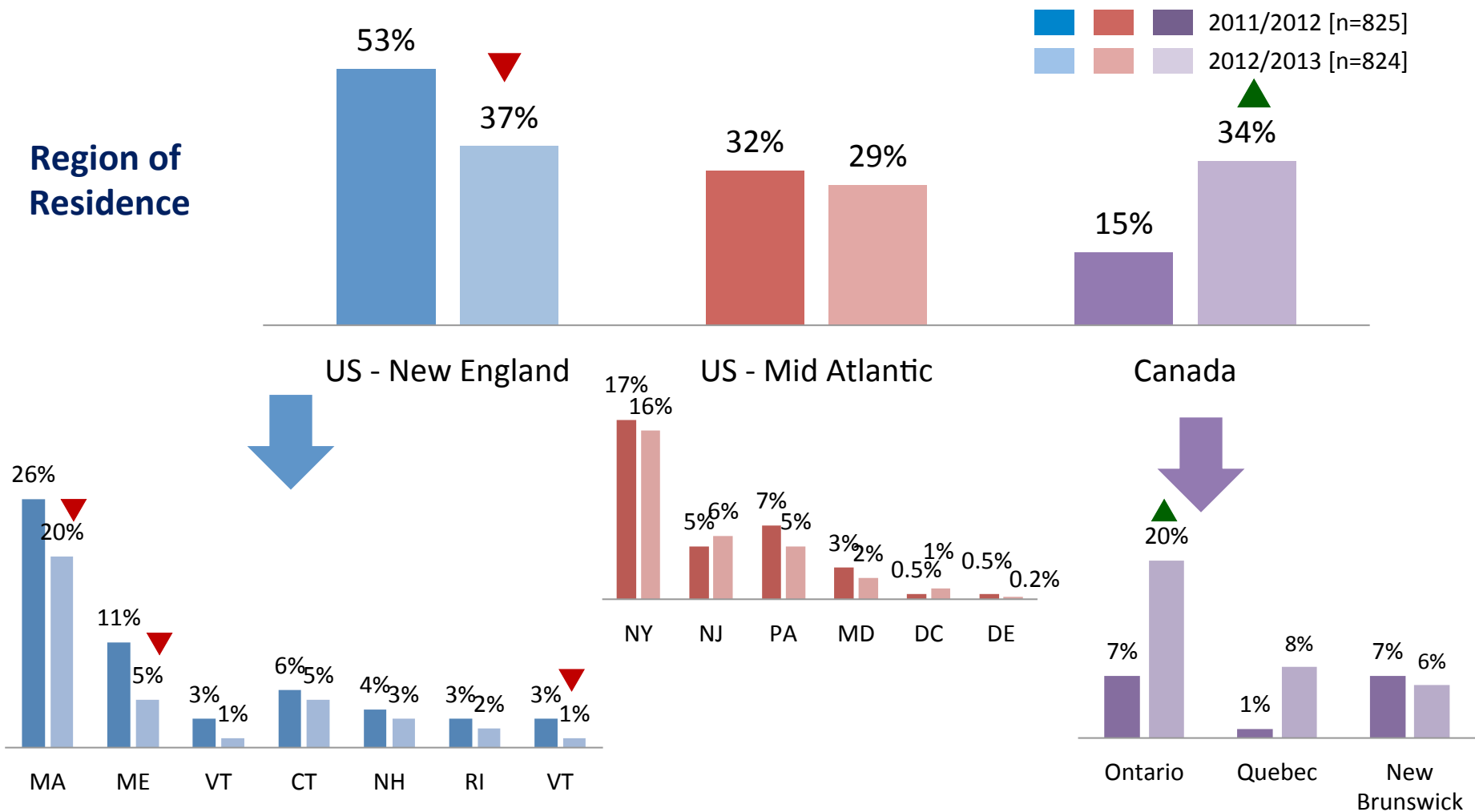
Age of Maine Visitors



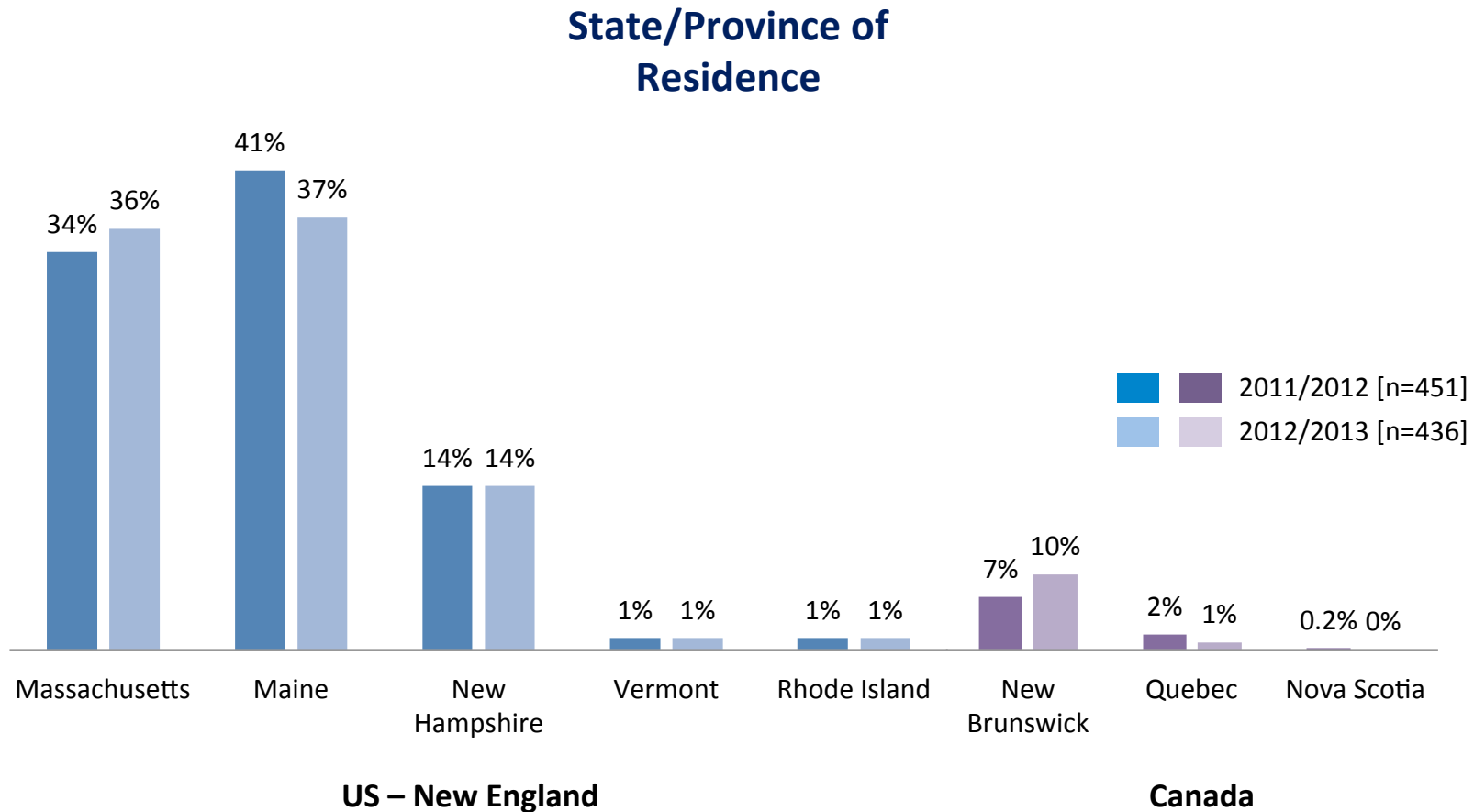
Primary Residence of Maine Winter Overnight Visitors



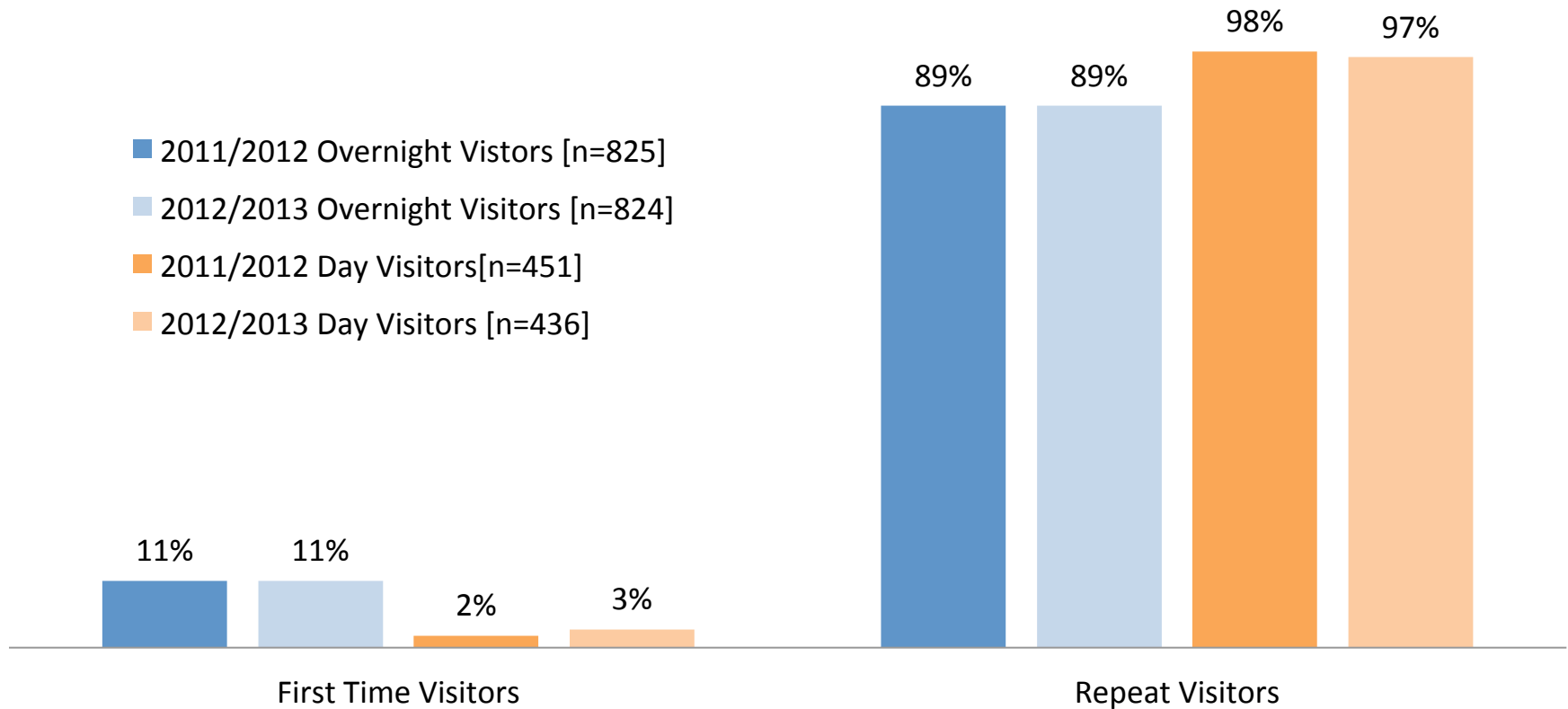
Primary Residence of Maine Winter Overnight Visitors



Primary Residence of Maine Winter Day Visitors

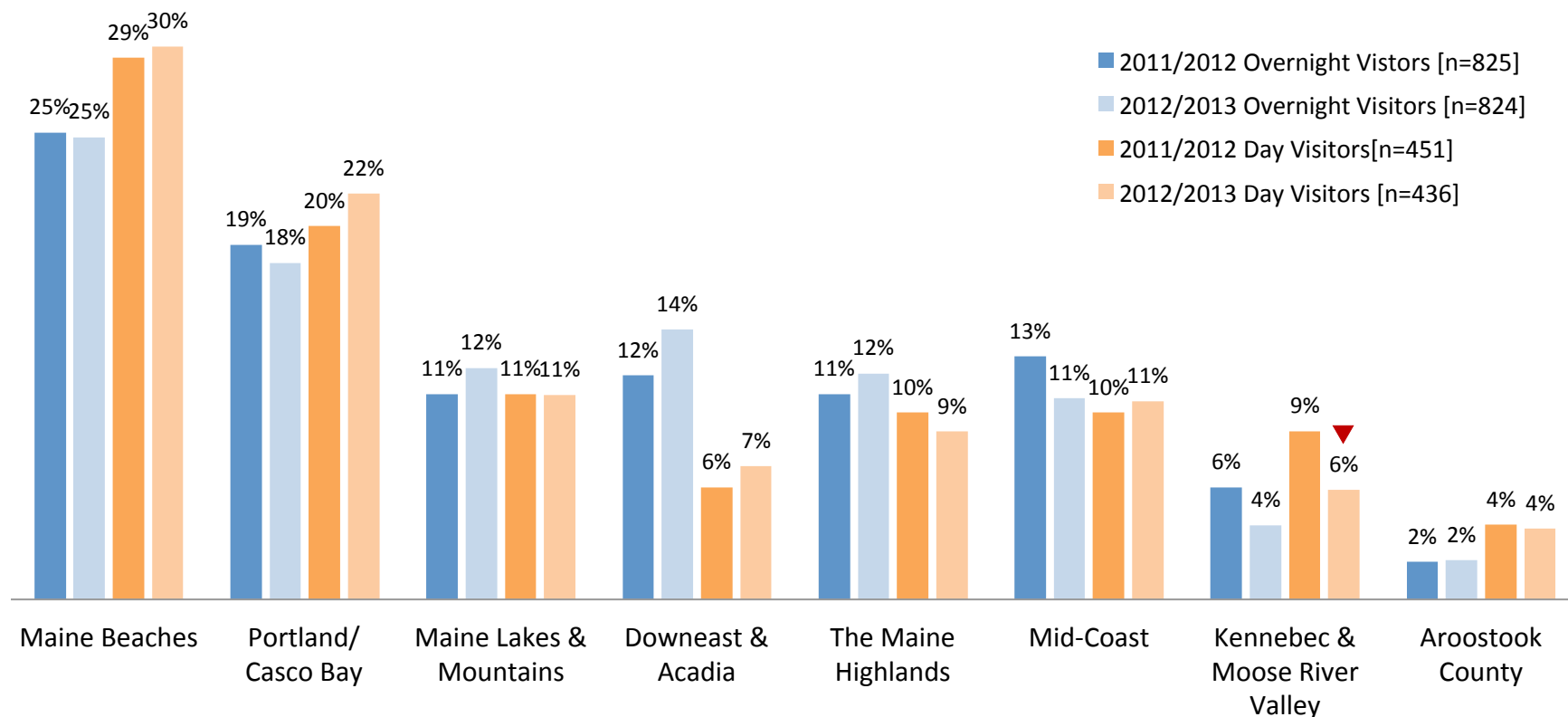


First Time and Repeat Visitors



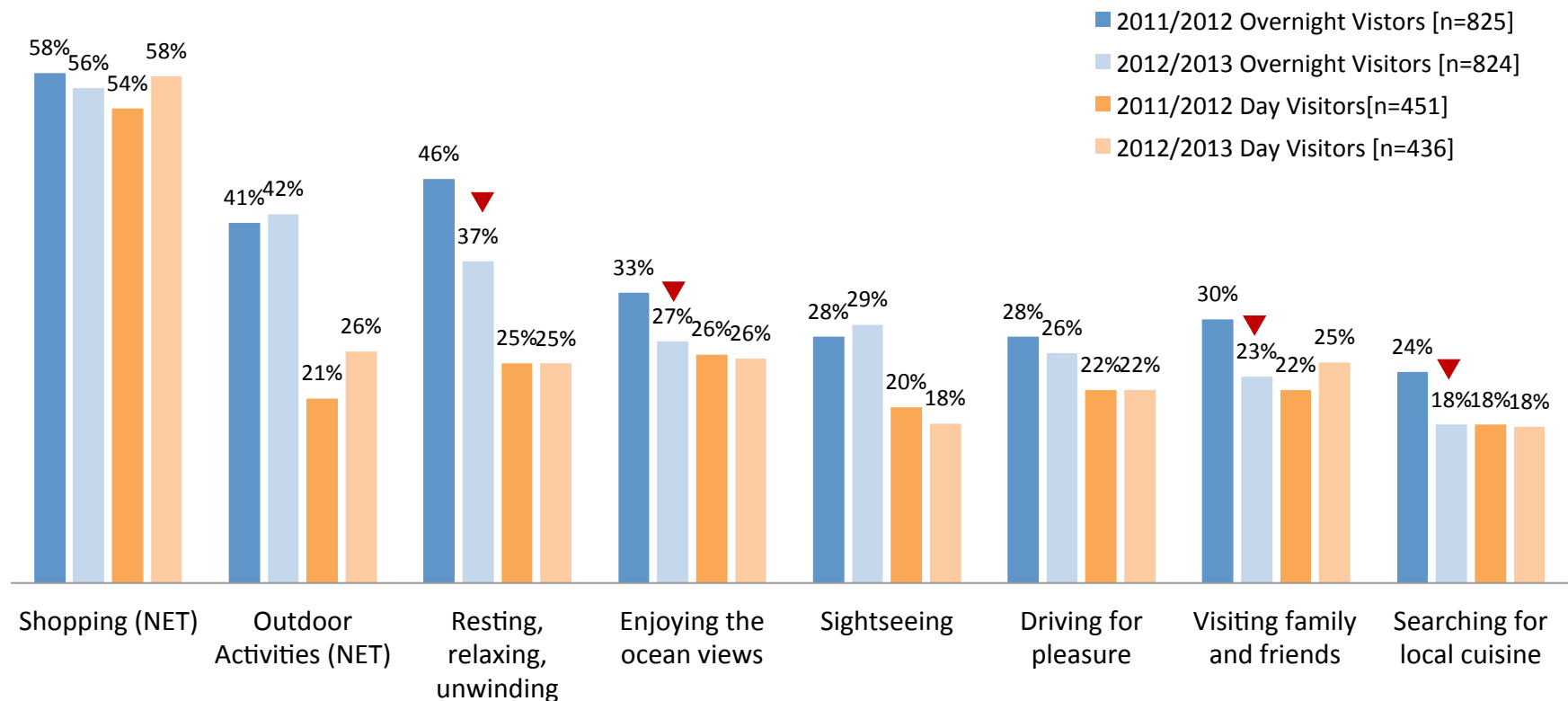
Regional Destination of Maine Winter Visitors

Regional Destination



Trip Activities of Maine Winter Visitors

Trip Activities

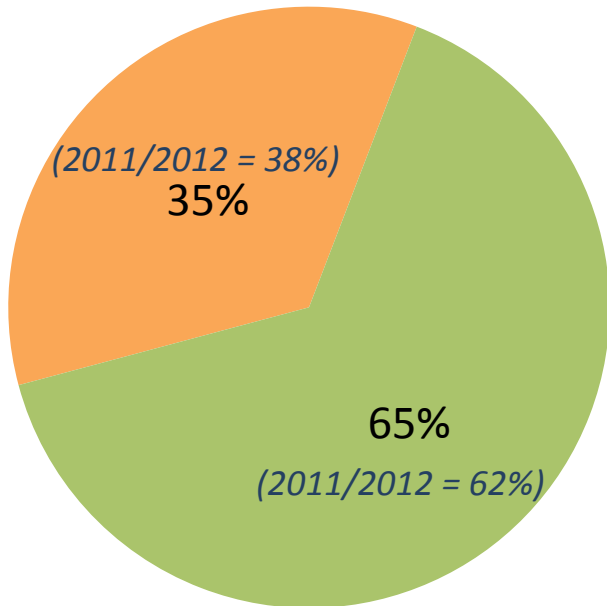


Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)
 Day Q10. In which of the following activities did you participate in during your most recent trip to Maine? (Please check all that apply)

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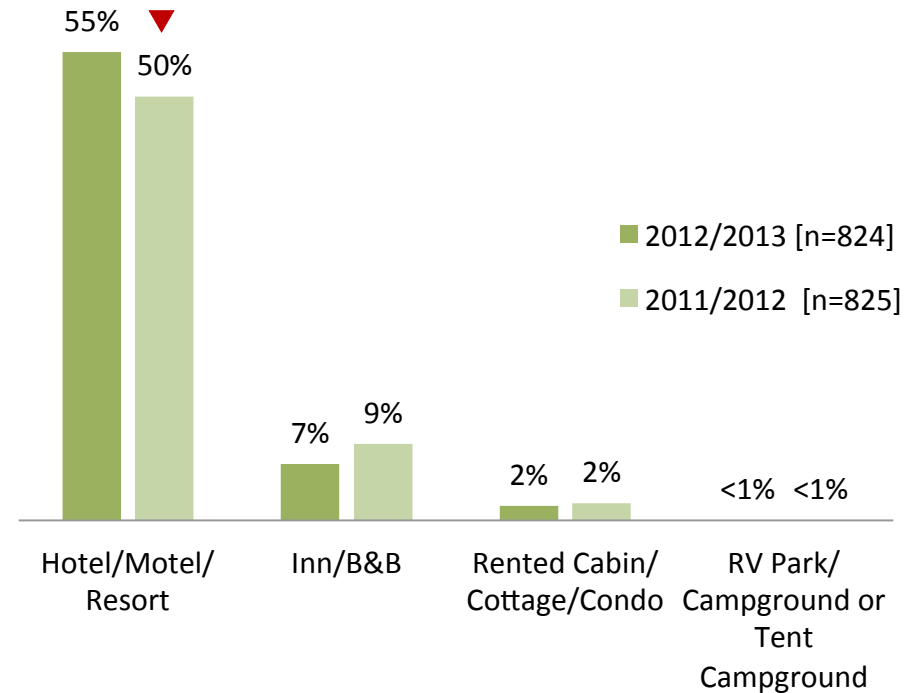
Accommodations – Overnight Visitors

Type of Accommodation
[n=824]



Unpaid Accommodations Paid Accommodations

Type of Paid Accommodation



Average Length of Stay: 3.1 Nights

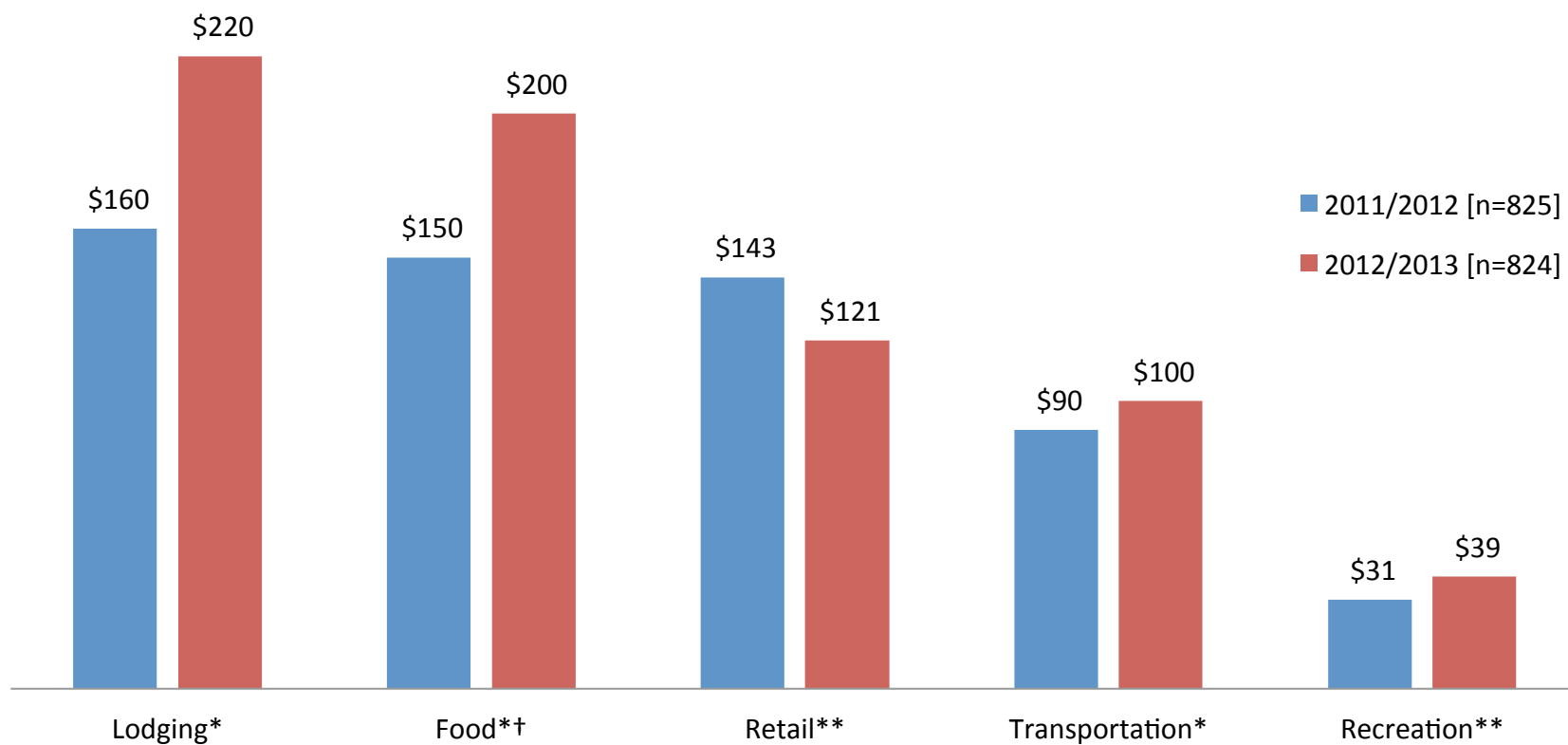
Regional Q8. On this trip to Maine, how many nights were you away from home?

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

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Average Spending per Travel Party

Overnight Visitors



Regional Q33. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below.

*Median Expenditures

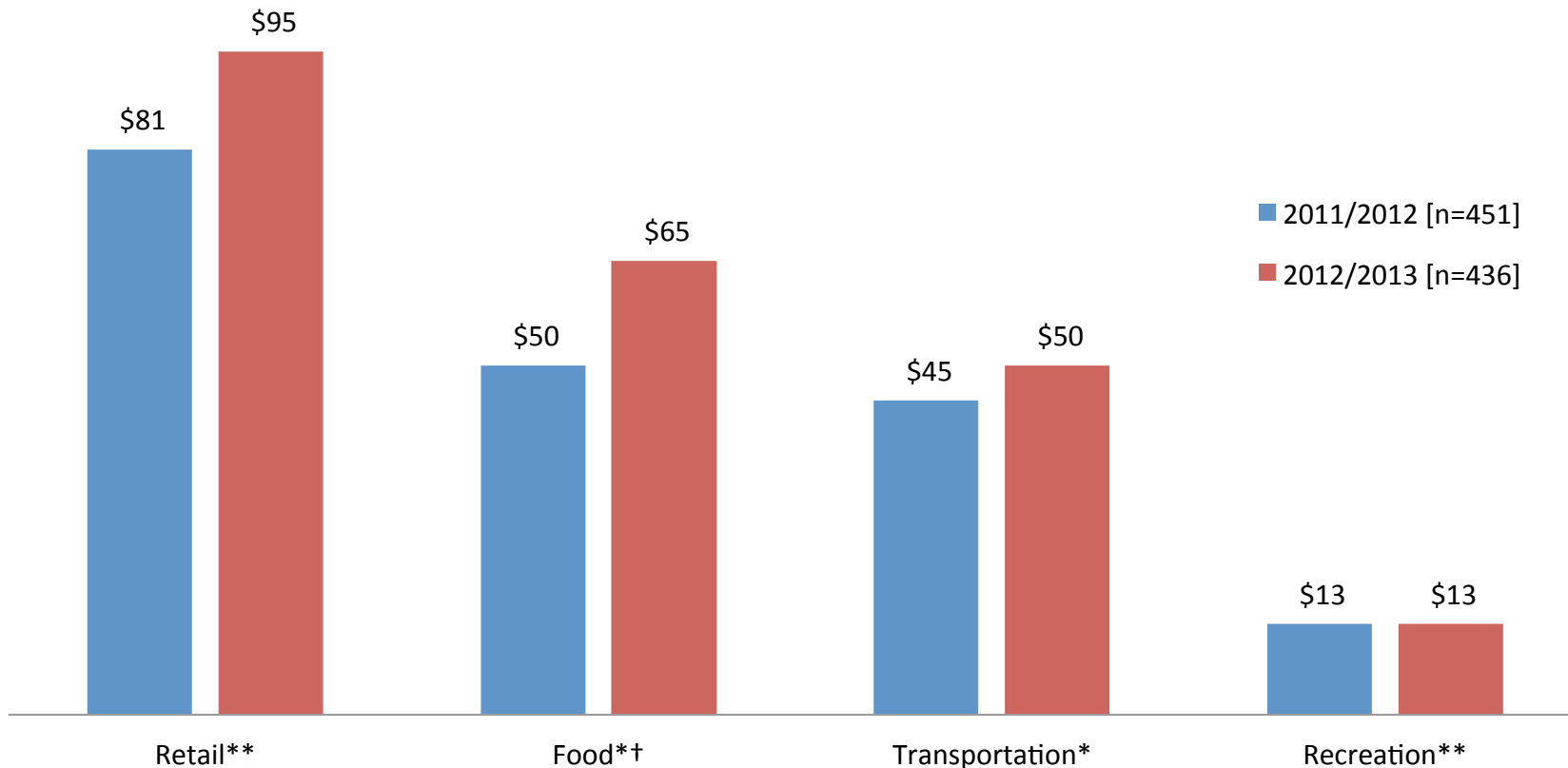
**Mean Expenditures

†Food expenditures from 2011 and 2012 are not directly comparable due to the addition of the “grocery” category in 2012.

▲▼ notes significant difference between 2012 and 2013 at the 95% confidence level

Average Spending per Travel Party

Day Visitors



Day Q14. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of the following categories below.

*Median Expenditures

**Mean Expenditures

†Food expenditures from 2011 and 2012 are not directly comparable due to the addition of the “grocery” category in 2012.

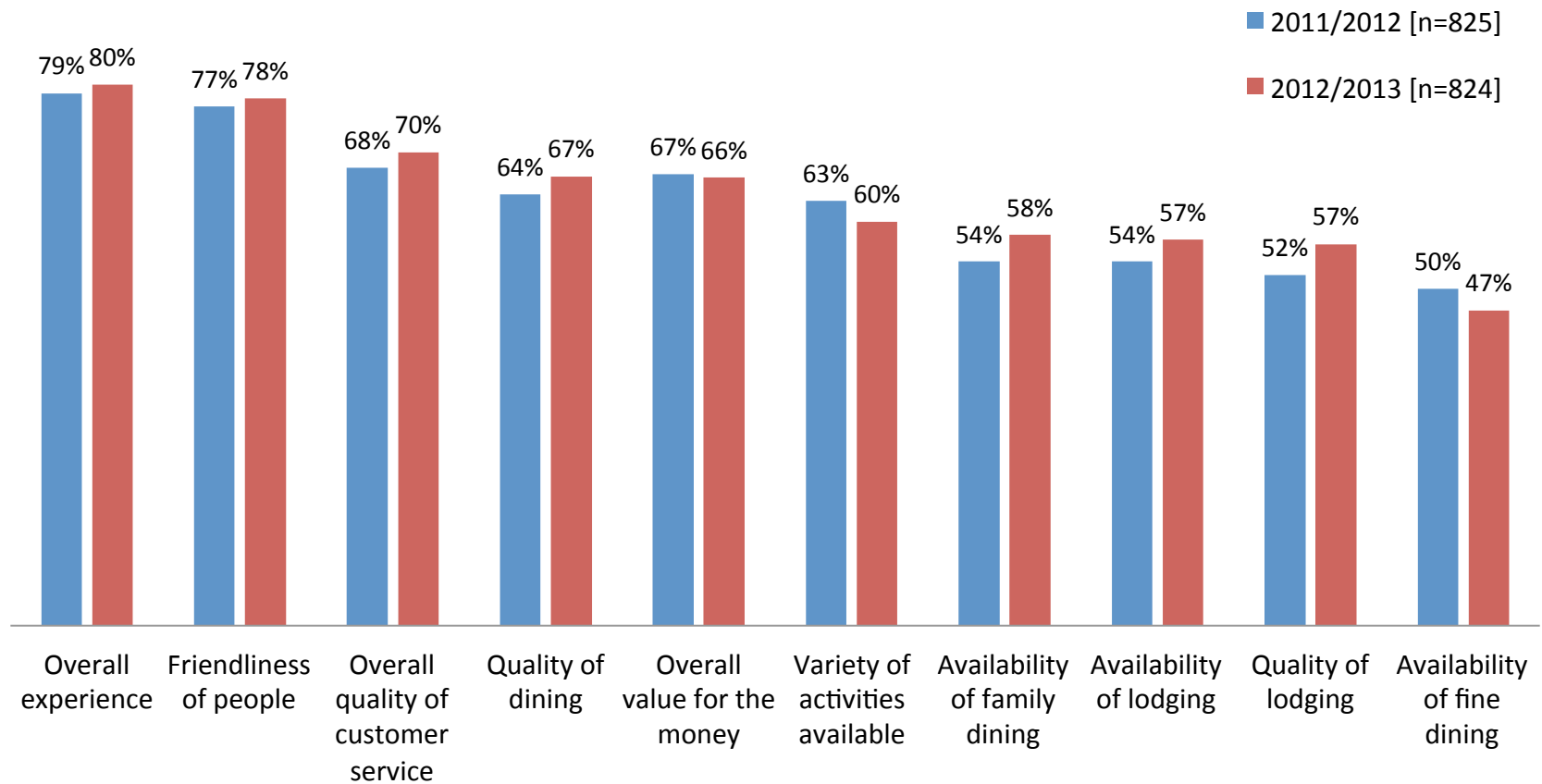
▲▼ notes significant difference between 2012 and 2013 at the 95% confidence level

Trip Evaluation



Maine Compared to Other Destinations – Overnight Visitors

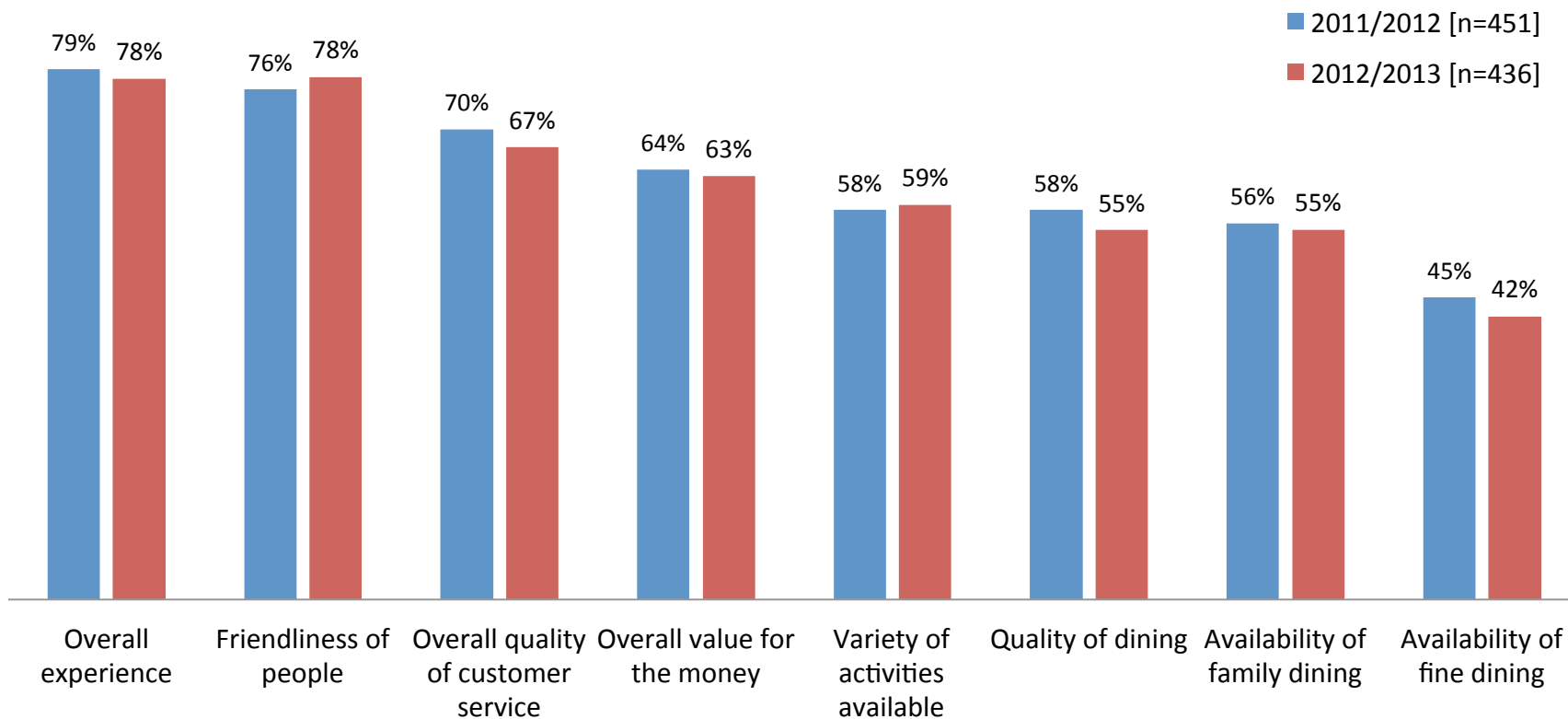
Top 2 Box Rating – “Better than Others”



Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.

Maine Compared to Other Destinations – Day Visitors

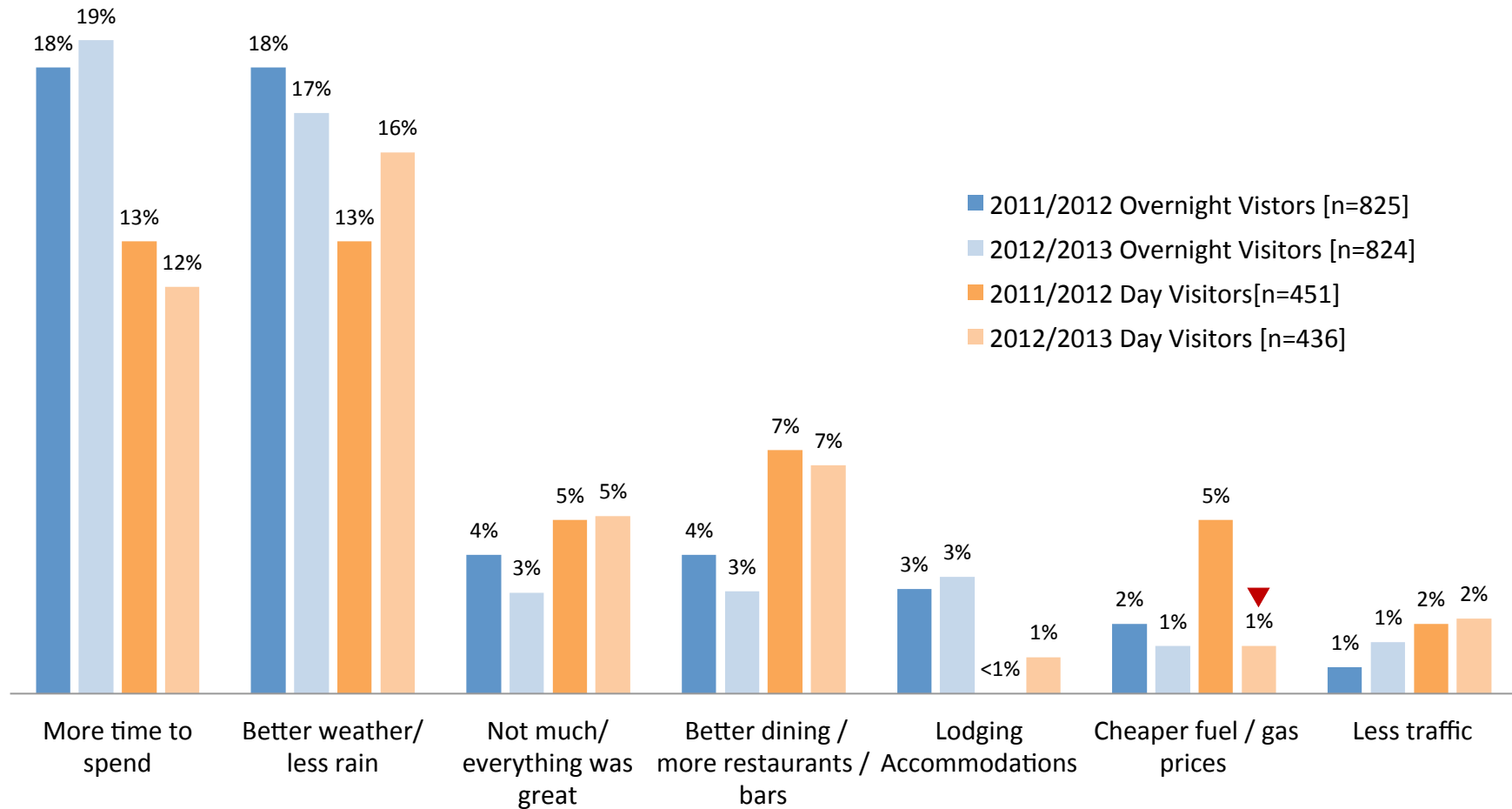
Top 2 Box Rating – “Better than Others”



Day Q13. Using the scale provided in the table below, please evaluate your day trip in Maine as compared to other destinations you've visited.

▲ ▼ notes significant difference between 2012 and 2013 at the 95% confidence level

Aspect of the Trip that Could Have Been Better

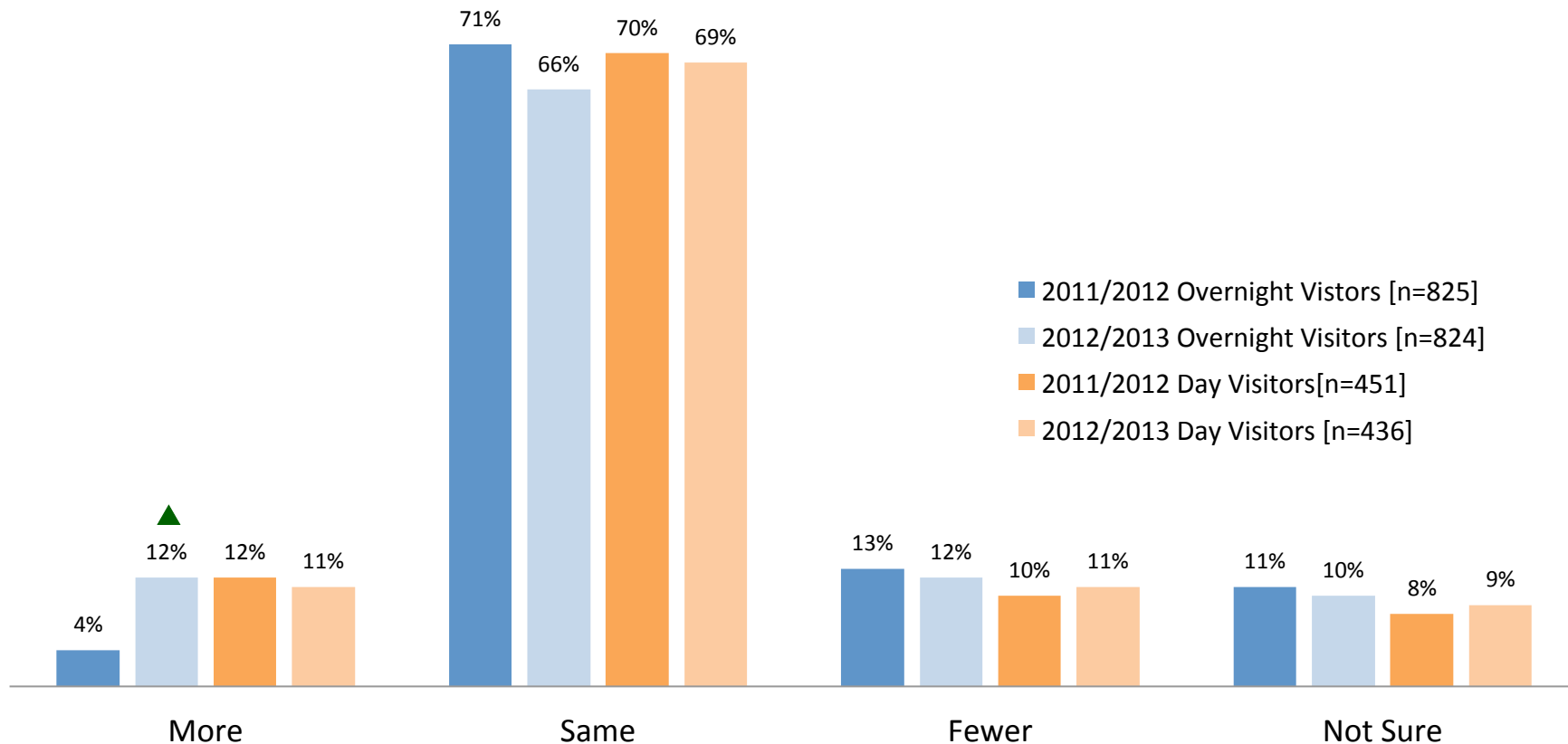


Future Travel



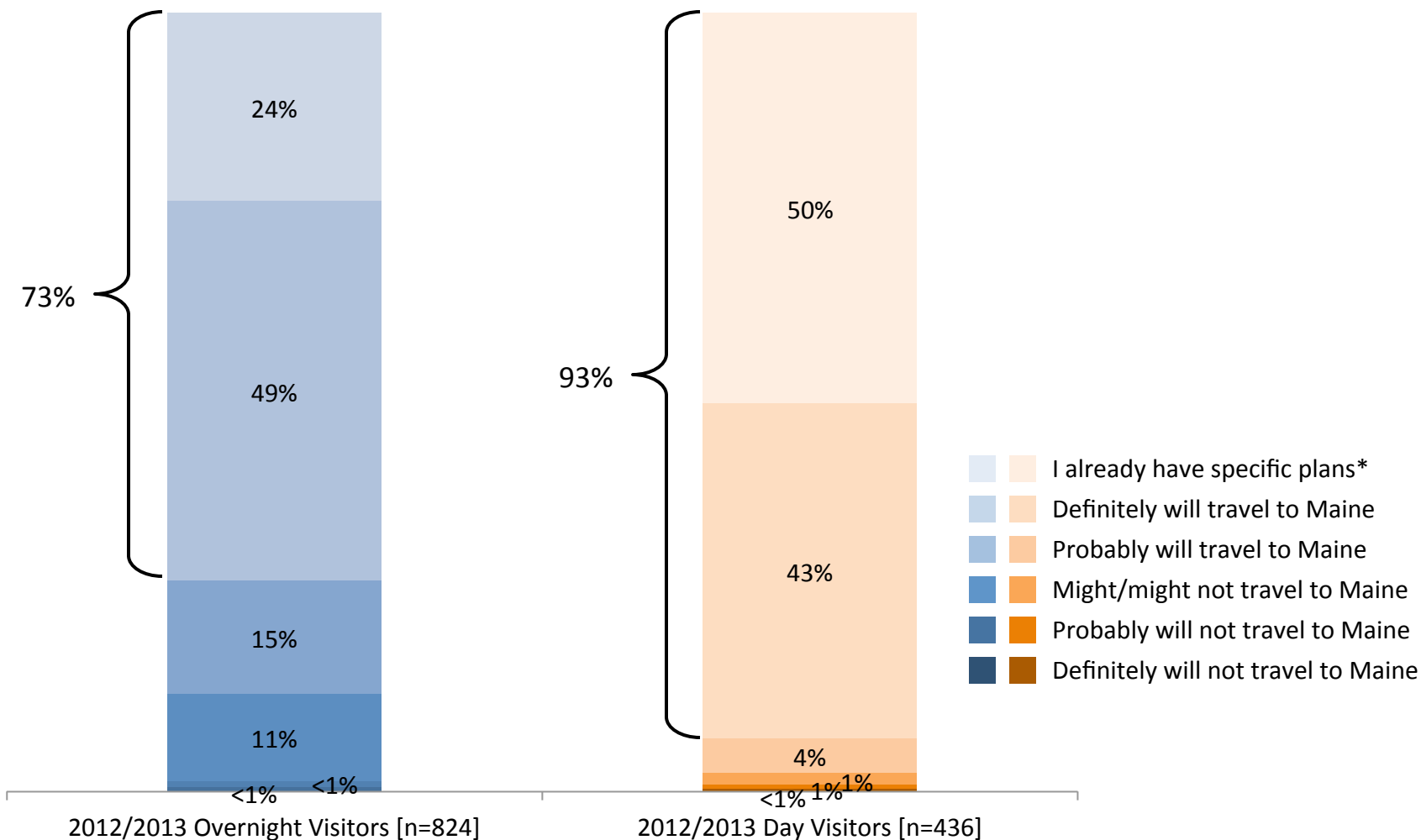
Future Intentions for Leisure Trips to Anywhere

Overall Leisure Trips Planned in Comparison to Last Year



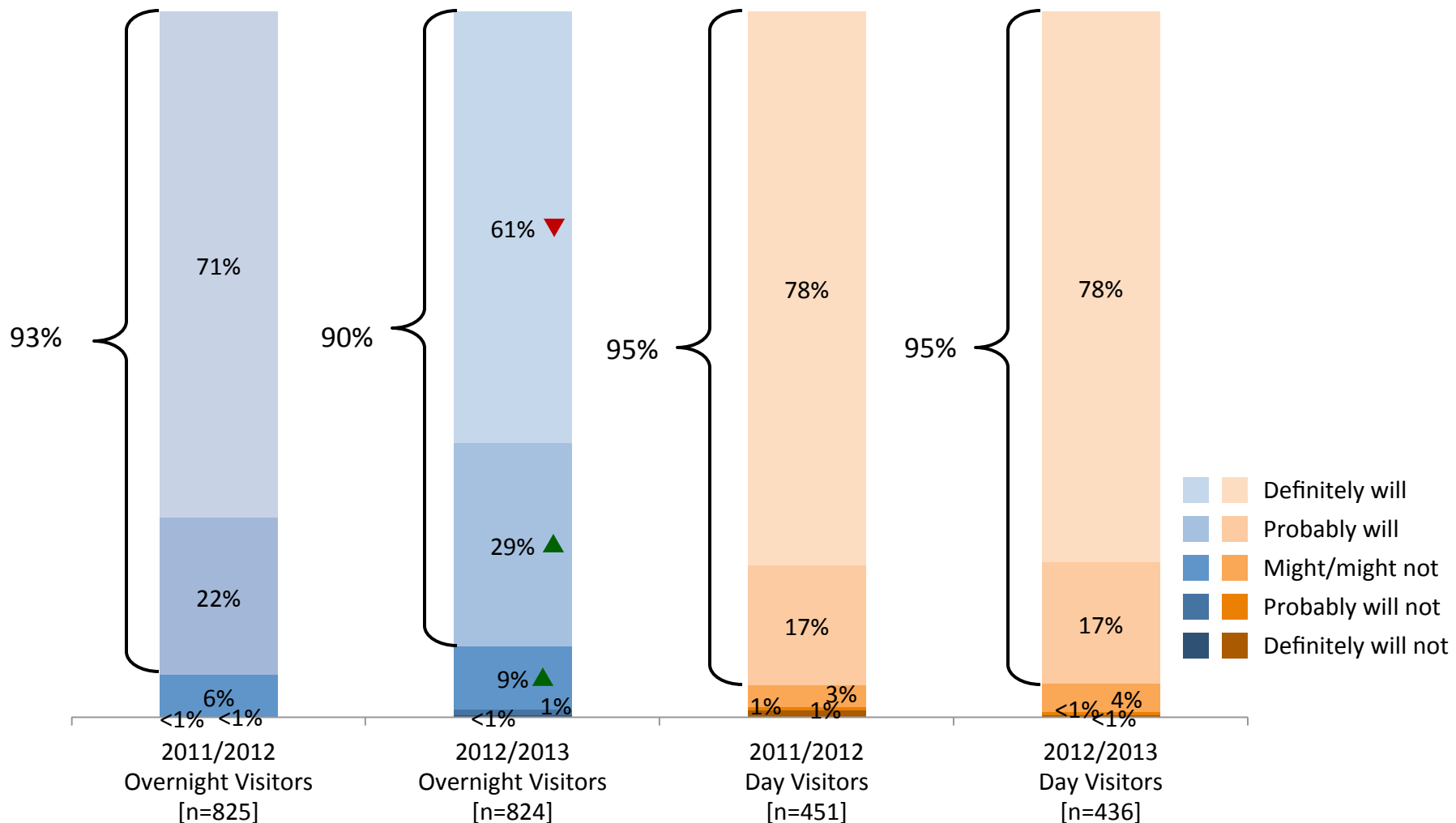
Future Travel to Maine

Likelihood of Trip to Maine in Next Two Years



Recommend a Trip to Maine

Likelihood of Recommending a Trip to Maine to Friends and Family





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