

# Maine Office of Tourism Visitor Tracking Research

## Summer 2013 Seasonal Topline

*Prepared by*



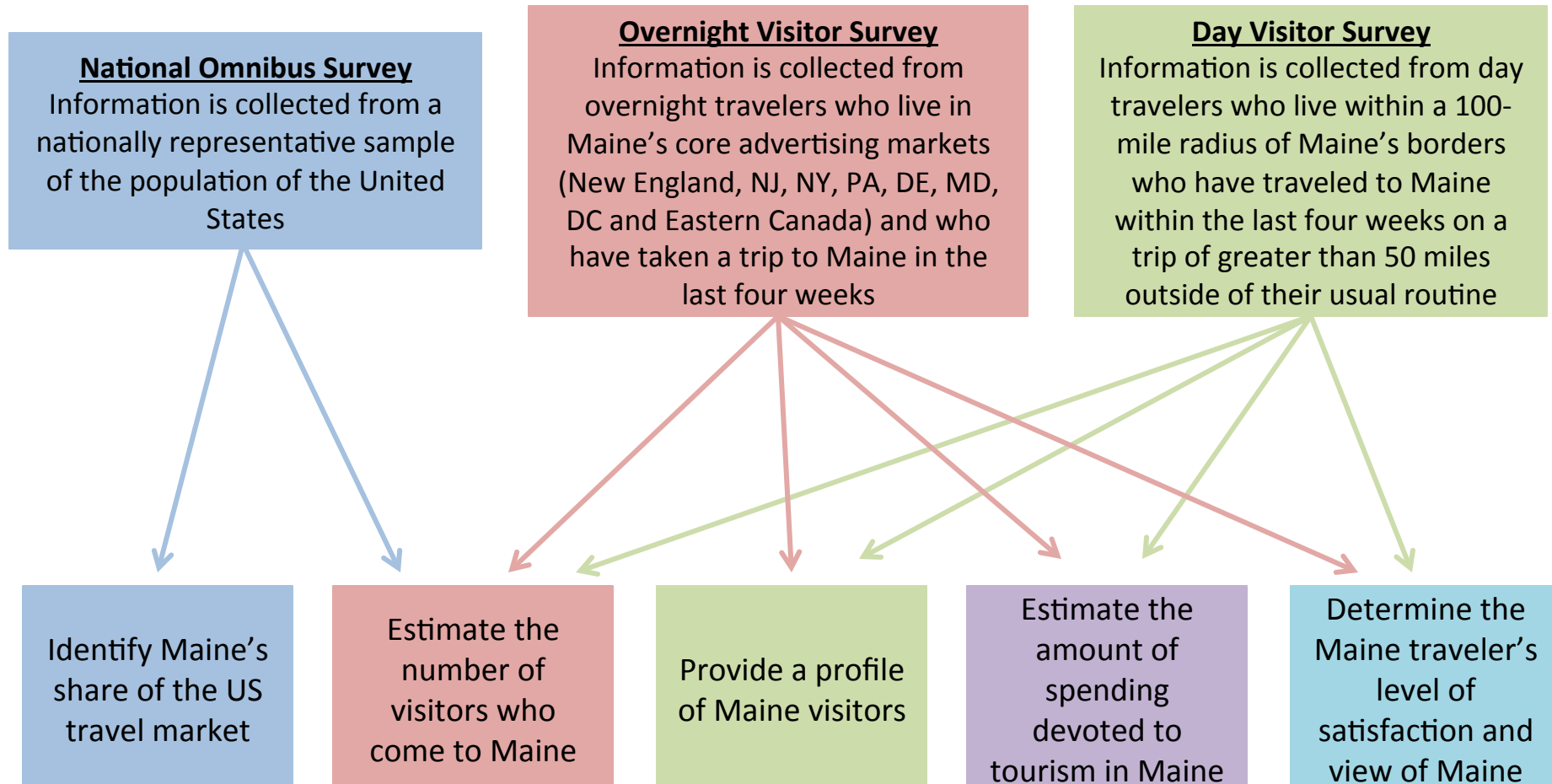
October 2013

# 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 May through August 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 summer seasons, travel nationwide from May to August 2013 was stable with the 2012 summer season. Maine appears to have fared better than the rest of the United States, with a sizeable increase in tourism-related day visitation to the State and a modest increase in overnight visitation.
- Higher than average amounts of rain during the 2013 summer season, combined with high gas prices during late July and throughout August, may have impacted overnight leisure travel. This impact can also be viewed in light of the fact that Maine experienced a drop in overnight visitation from its nearby markets during the Summer of 2013. Travelers residing nearer to Maine theoretically would be more flexible in making last-minute changes to their travel plans based on weather conditions. These travelers are also more likely to be traveling by personal car and therefore more likely to be impacted by high gas prices.

## Executive Summary

- After seeing year-over-year increases in Canadian overnight visitation in Summer 2012, Fall 2012, and Winter 2012/2013, this summer's Canadian visitation appears to be on par with Summer 2012, suggesting a potential leveling off of this increase in Canadian visitation.
- Also trending upwards in prior years, the proportion of overnight visitors staying in paid accommodations leveled off this season, with almost the same proportion of Summer 2013 overnight visitors paying for their lodging as did during the Summer 2012 season (69% and 67%, respectively). The previously discussed correlation between the increase in paid accommodations and the increase in Canadian visitation can be further supported by this parallel stabilization in Canadian overnight visitation and the proportion of visitors staying in paid accommodations. This is possible since Canadian visitors are more likely to stay in paid accommodations than are their U.S. counterparts.

## Executive Summary

- Consistent with last summer, first-time visitors account for 15% of Maine's overnight visitors and fewer than 5% of day visitors.
- Maine's high repeat visitation is not surprising given that the State continues to receive very 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.

# 2013 Summer Season Travel Context





## National Context – Sequester

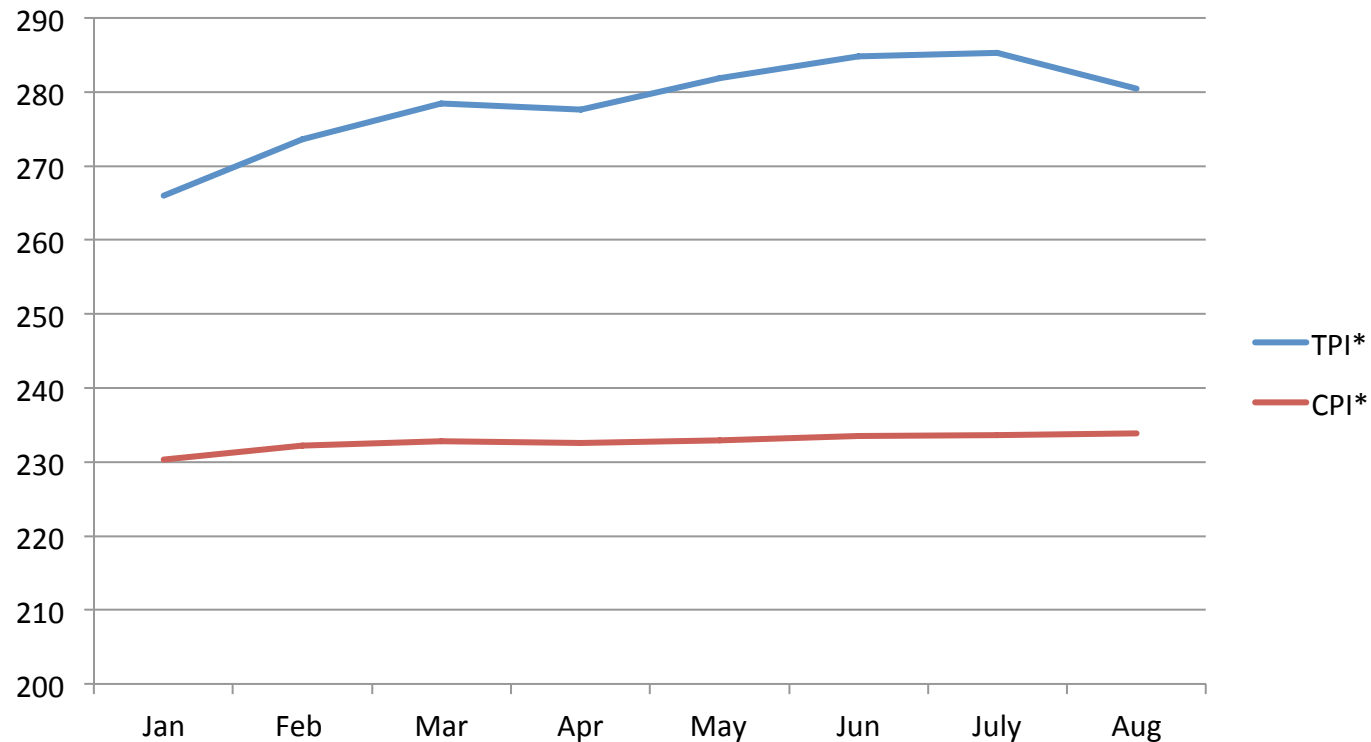
- The summer travel season began with the first debt ceiling debate and a sequester that furloughed many government workers. Indirectly, this impacted Maine travel due to a slow down in the overall economy. Directly, the furlough impacted Maine by postponing the open date for Acadia National Park.



## Economic Context – Price Indices

- As seen historically, the Travel Price Index in the first half of 2013 is increasing at a faster rate than the overall Consumer Price Index. While a slight decrease is seen in the Travel Price Index between July and August, the index is likely to continue to increase through the end of 2013.

**Consumer Price Index and Travel Price Index 2013**



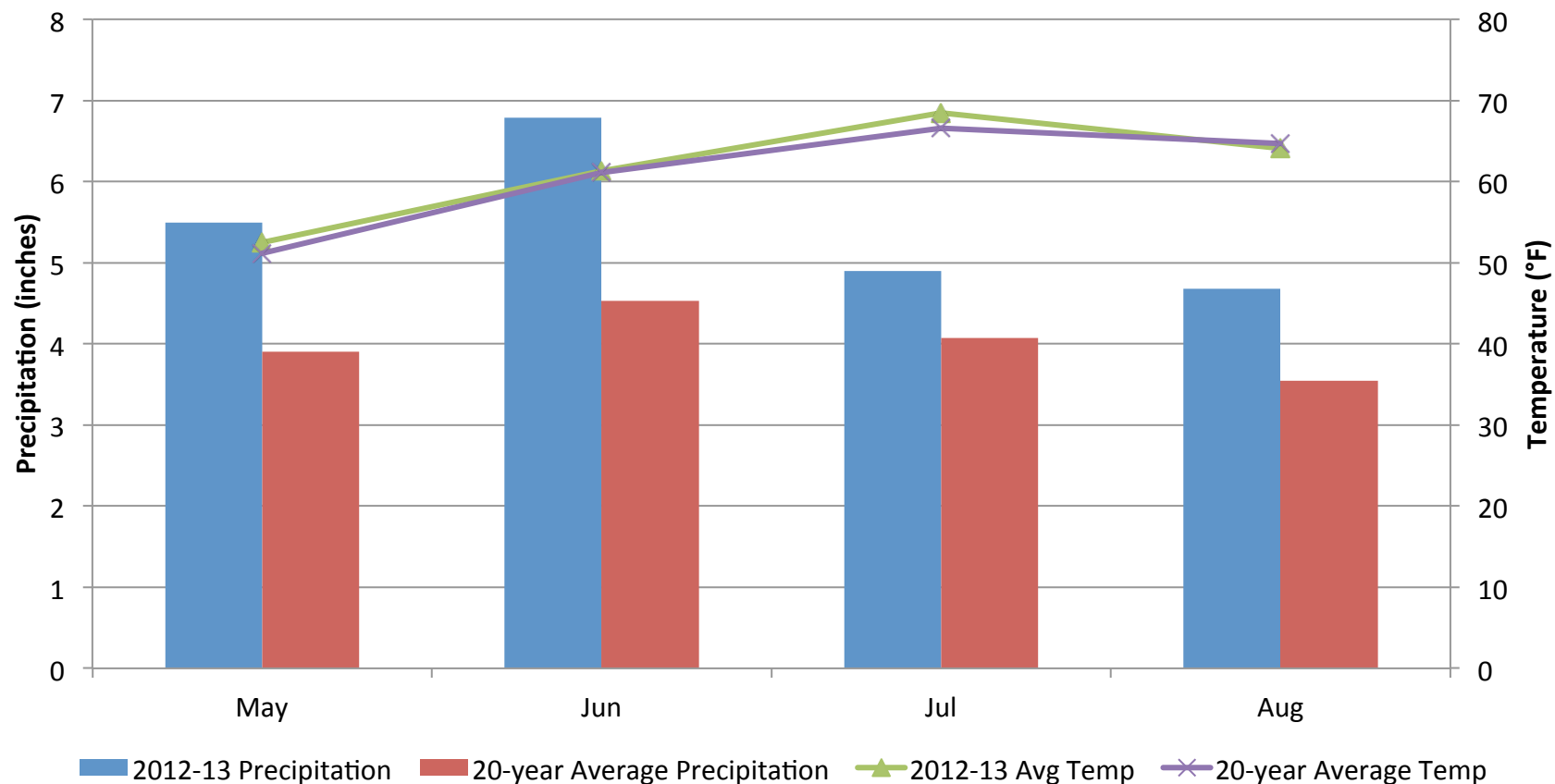
*\*Note: base years for Consumer Price and Travel Price Indices are 1982-1984=100*

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

# Maine Weather

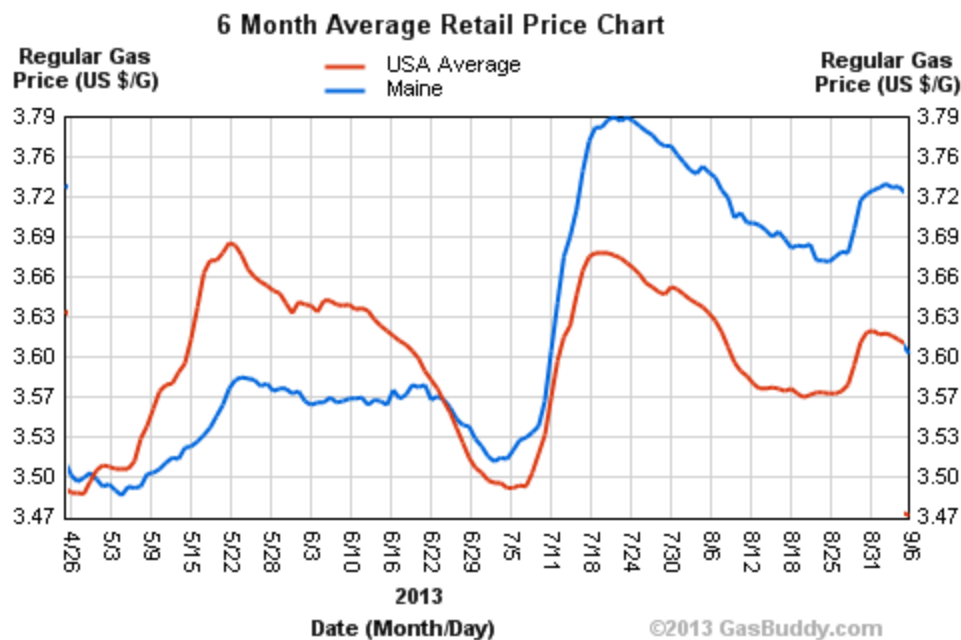
- Maine experienced above average amounts of precipitation throughout the summer of 2013, while temperatures remained consistent with the 20-year average.

Precipitation and Temperature – Maine Summer 2013



## Gas Prices

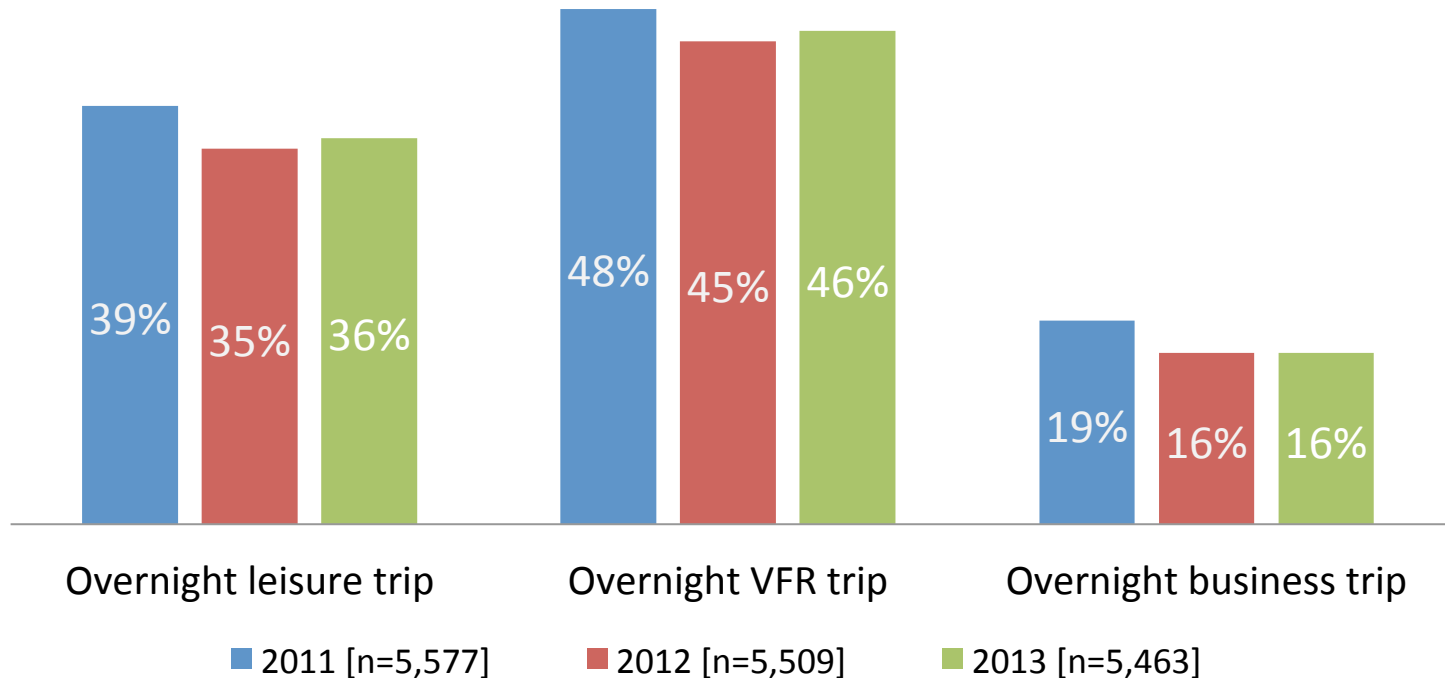
- Following on its decline in March and April 2013, the average price of gasoline in Maine remained below the national average through mid-June. In early July, gas prices began their ascent both nationwide and in Maine, with Maine's prices surpassing the national average through the rest of the summer and peaking in mid-July.



## National Travel Context

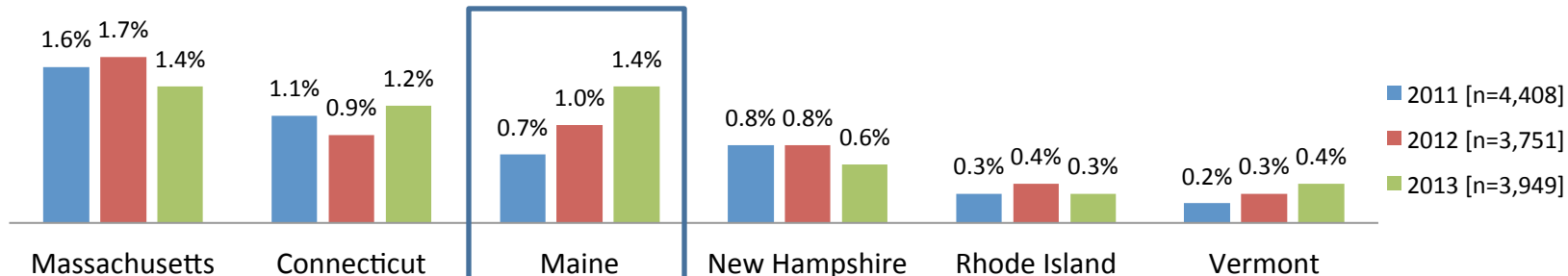
- After dropping from 2011 to 2012, the proportion of US residents traveling during the Summer 2013 season has remained steady, continuing on the pattern seen when comparing the most recent winter season with prior winter seasons.

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

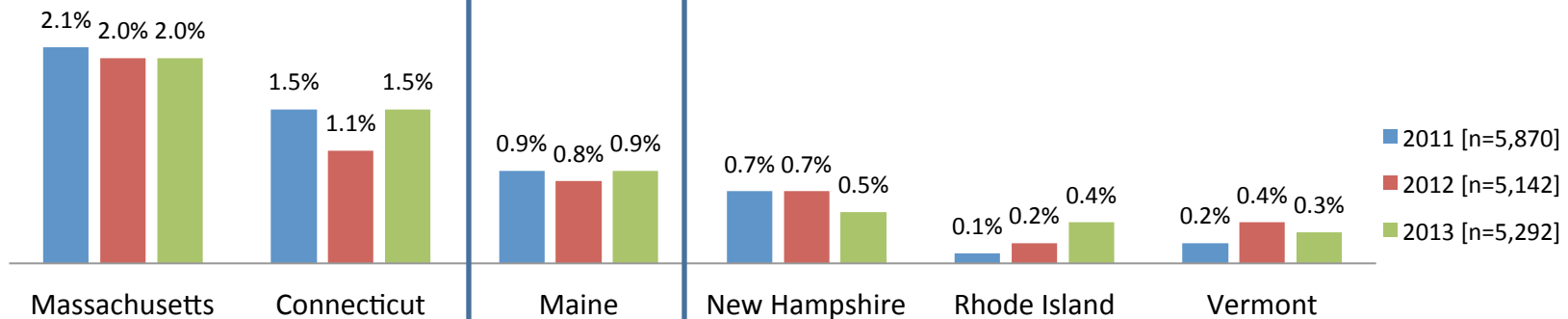


# Maine's Market Share

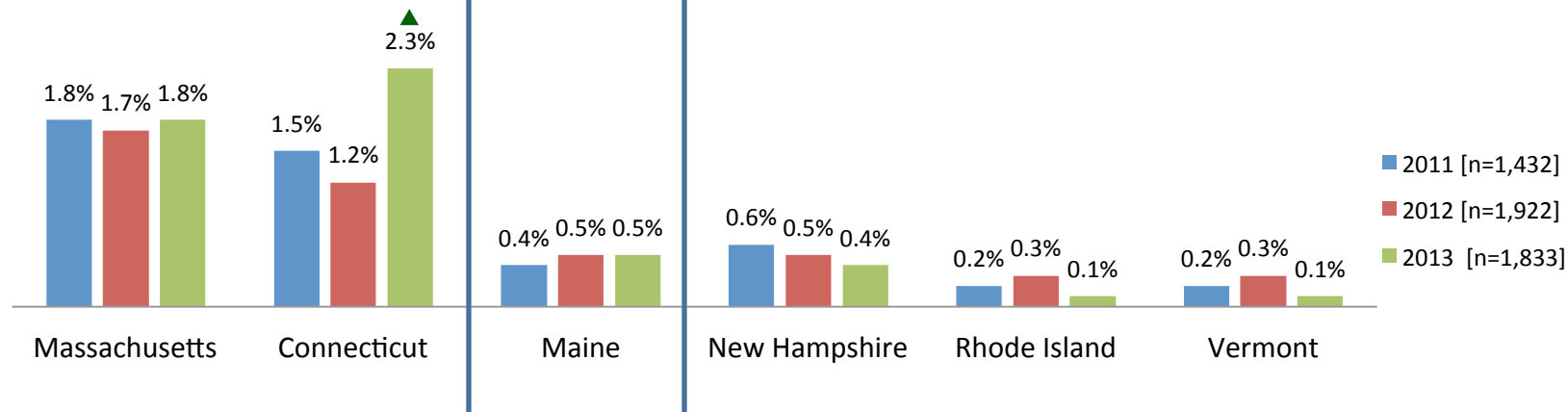
## Overnight Leisure Trips



## 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

# 2013 Summer Season Highlights



## Estimated Summer Visitation to Maine\*

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

Visitation Estimates	Summer 2012	Summer 2013	% Chg
Overnight Visitors	8,725,048	8,886,174	1.8%
Day Visitors	11,422,366	13,329,573	16.7%

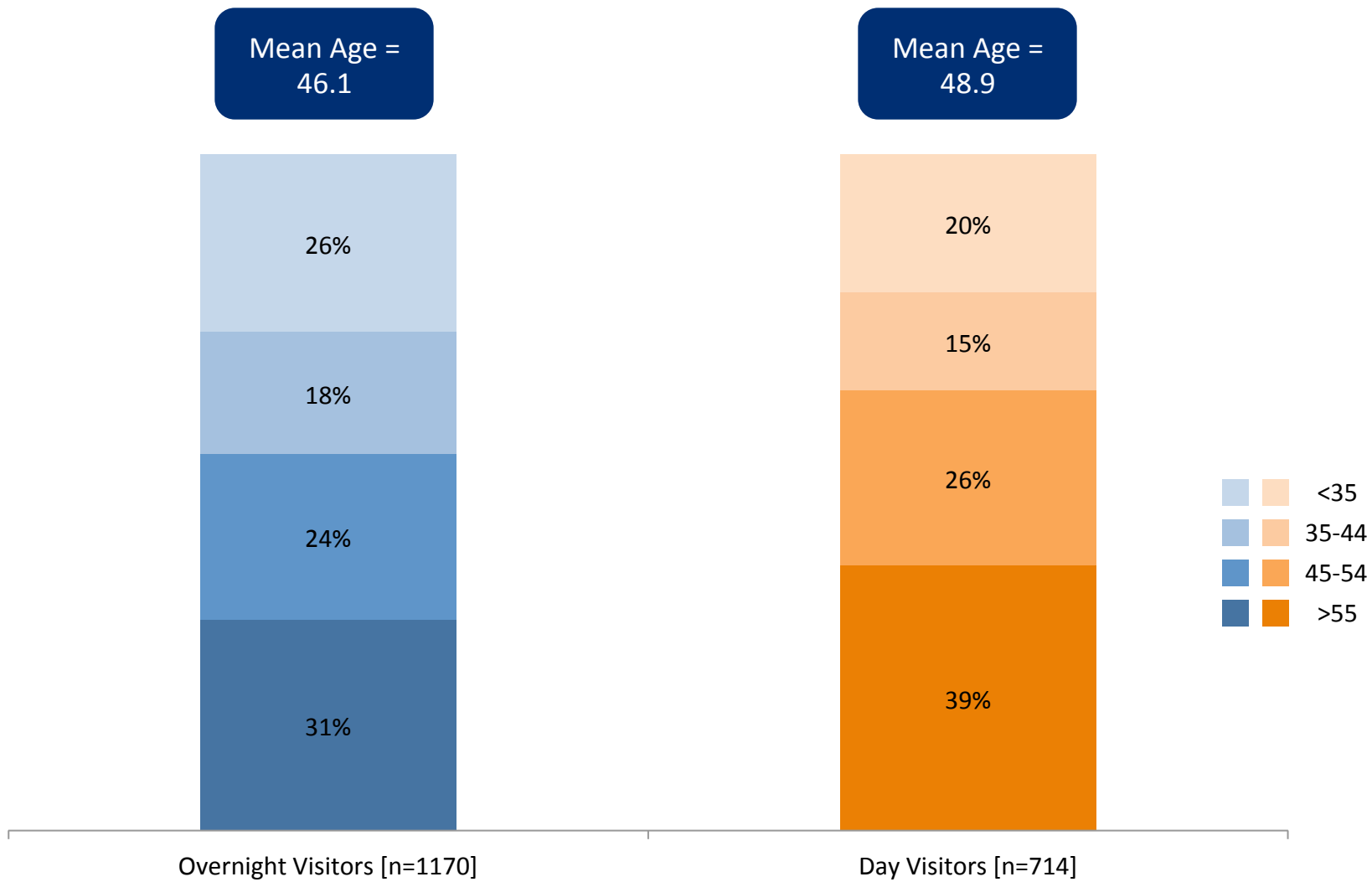
*\*For the purposes of visitation estimates, only visitors on tourism related trips are included.*

*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.*

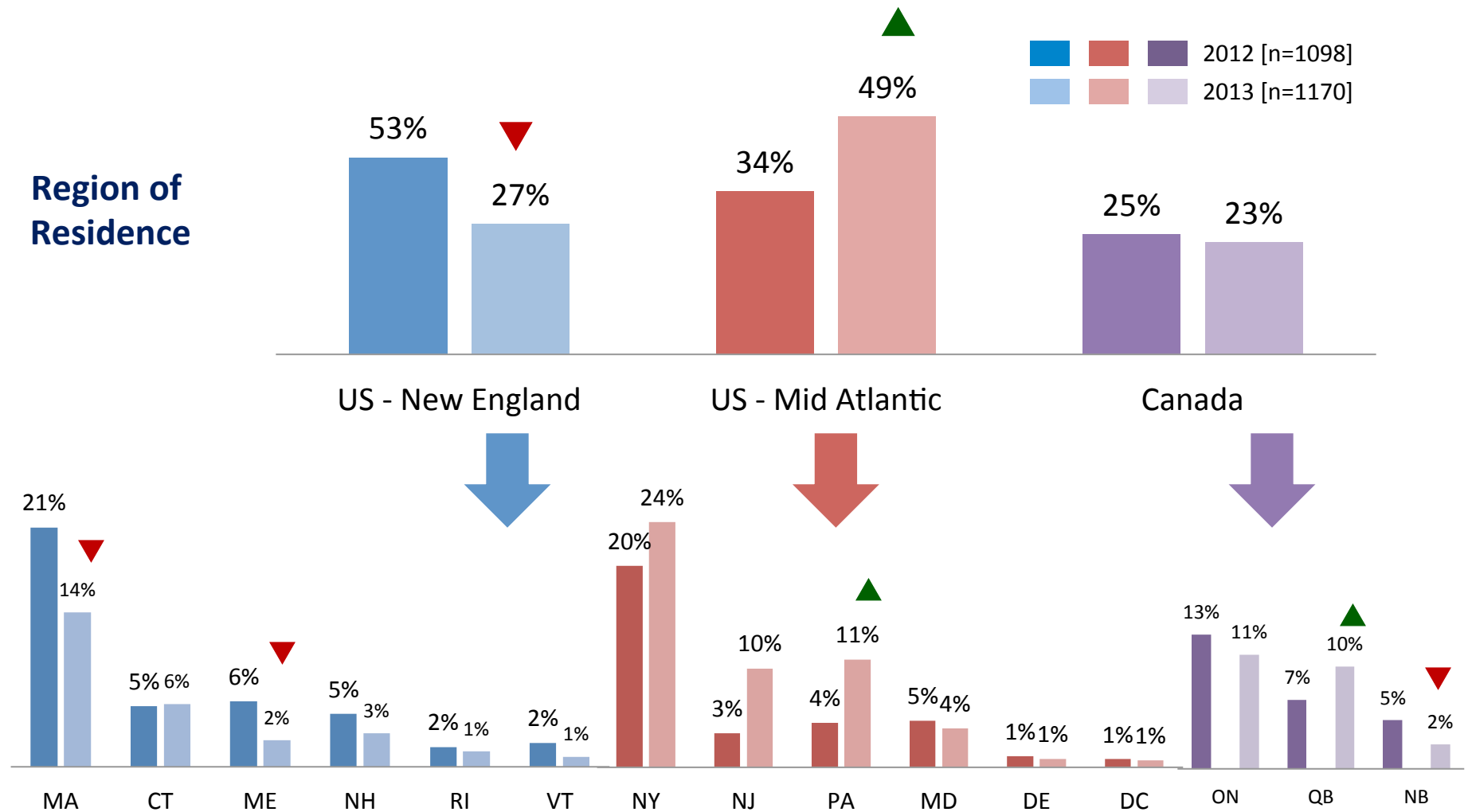


# Age of Maine Visitors



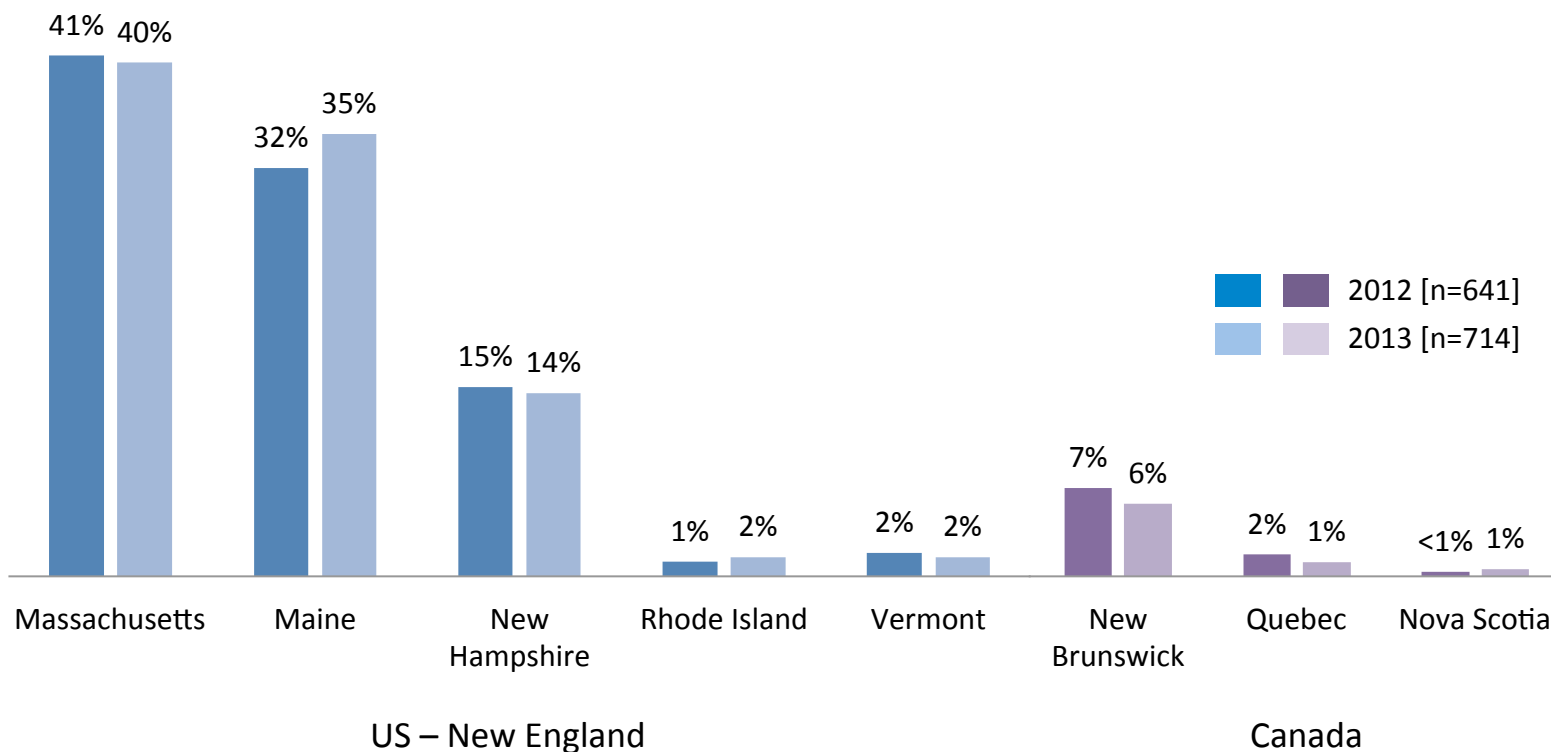
# Primary Residence of Maine Summer Overnight Visitors

Region of Residence

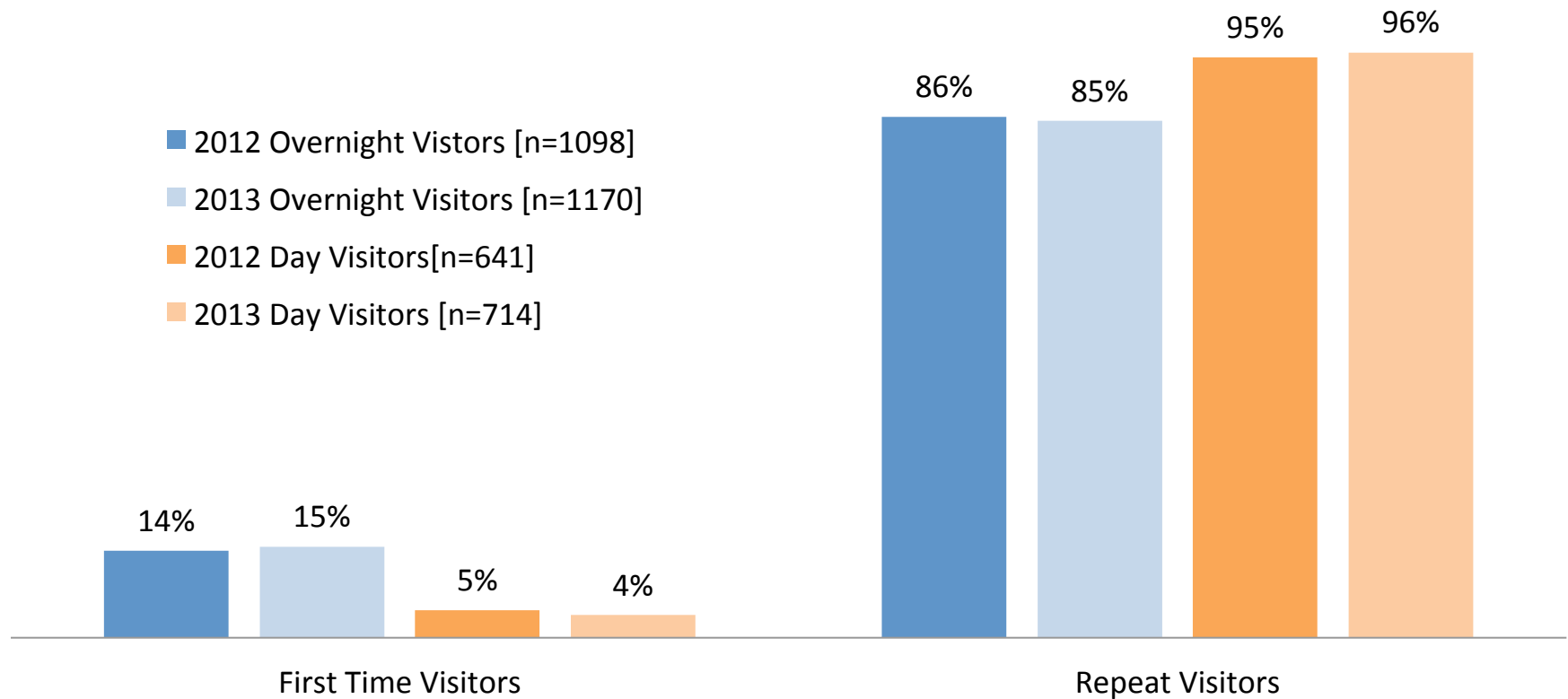


# Primary Residence of Maine Summer Day Visitors

## State/Province of Residence

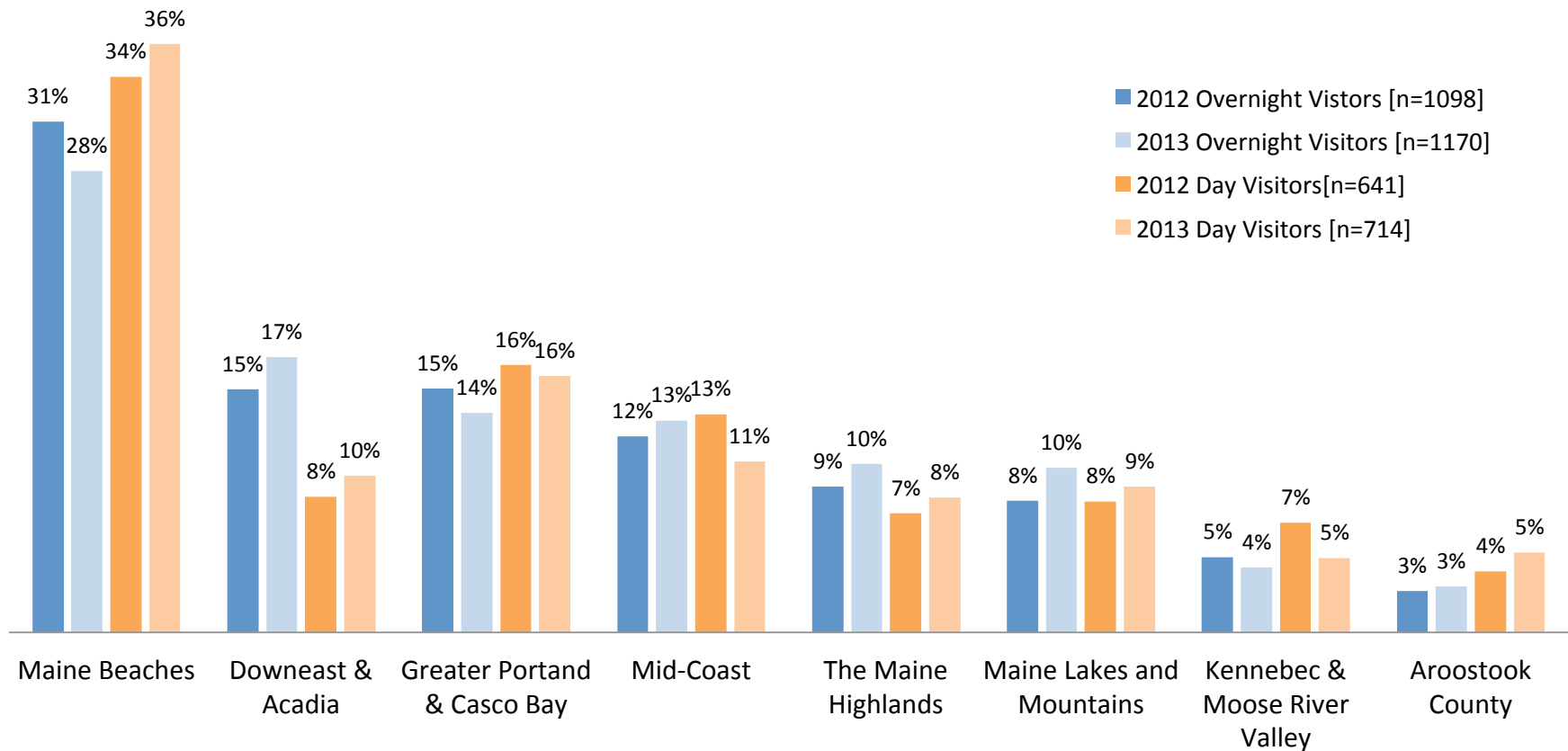


# First Time and Repeat Visitors



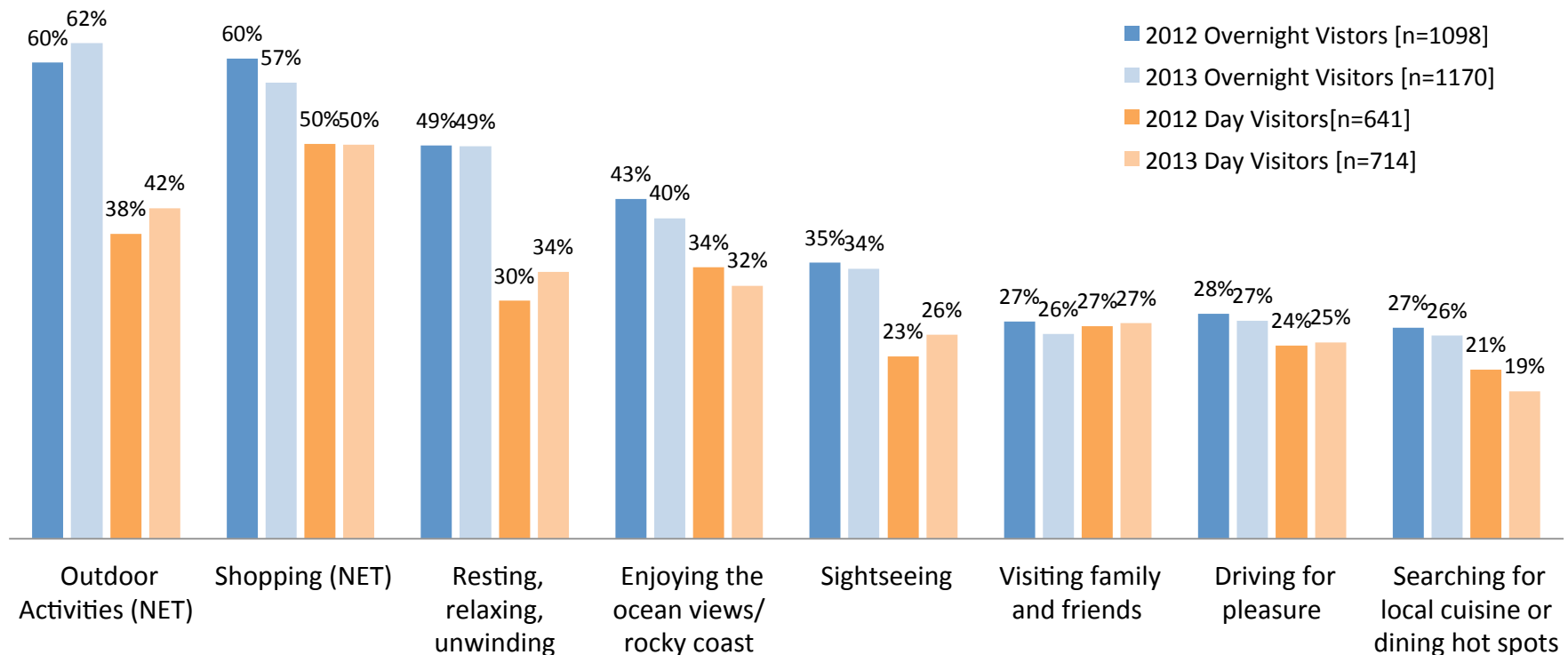
# Regional Destination of Maine Summer Visitors

## Regional Destination



# Trip Activities of Maine Summer Visitors

## Trip Activities

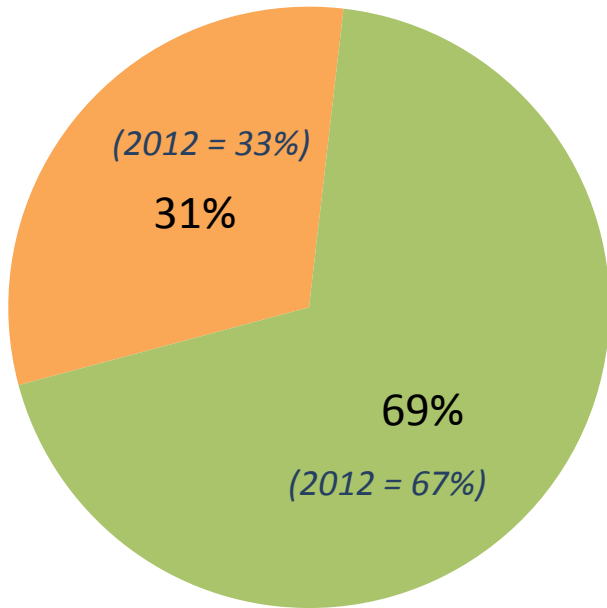


Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)  
 Day Q10. In which of the following activities did you participate in during your most recent trip to Maine? (Please check all that apply)

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

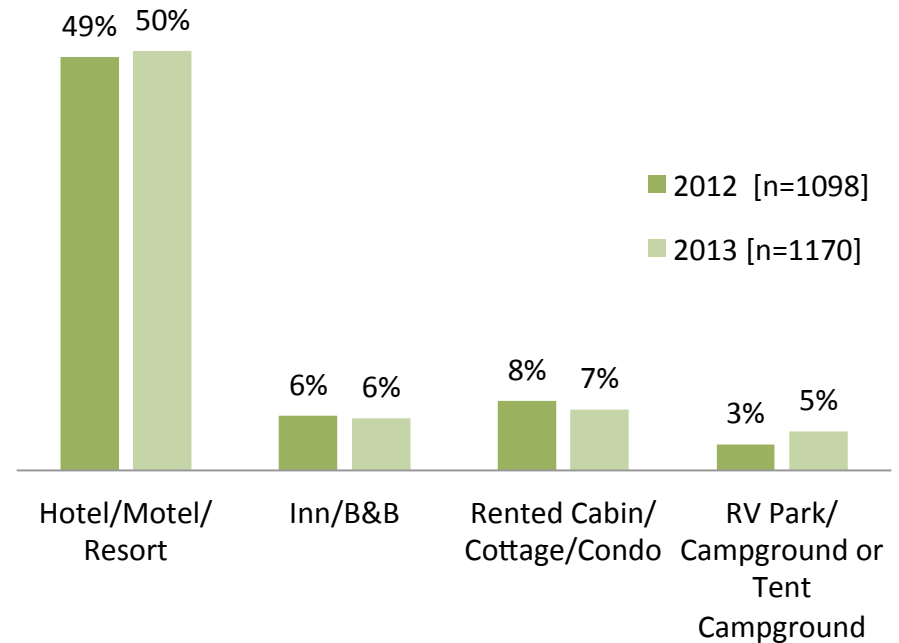
# Accommodations – Overnight Visitors

Type of Accommodation  
[n=1170]



Unpaid Accommodations      Paid Accommodations

Type of Paid Accommodation



**Average Length of Stay: 4.0 Nights**

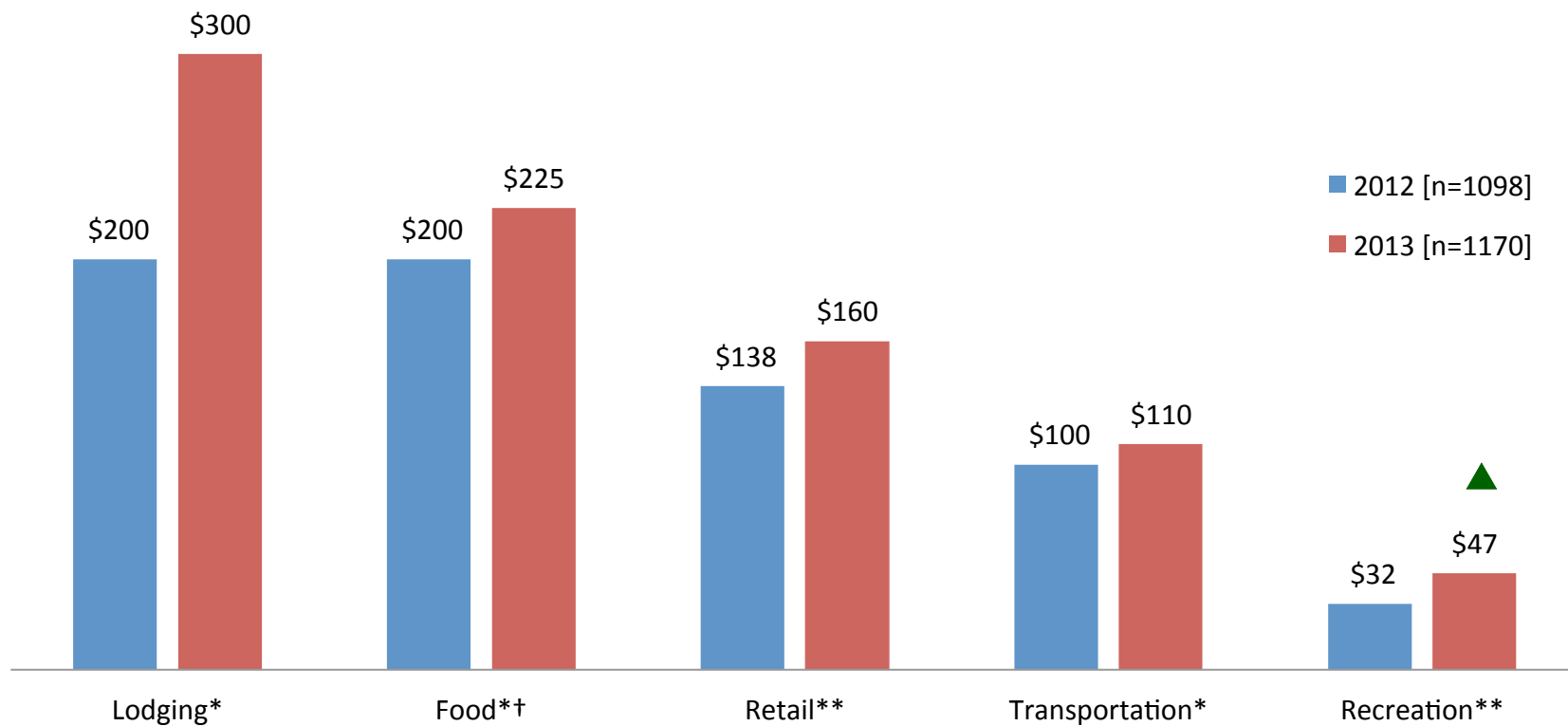
Regional Q8. On this trip to Maine, how many nights were you away from home?

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

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

# 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.

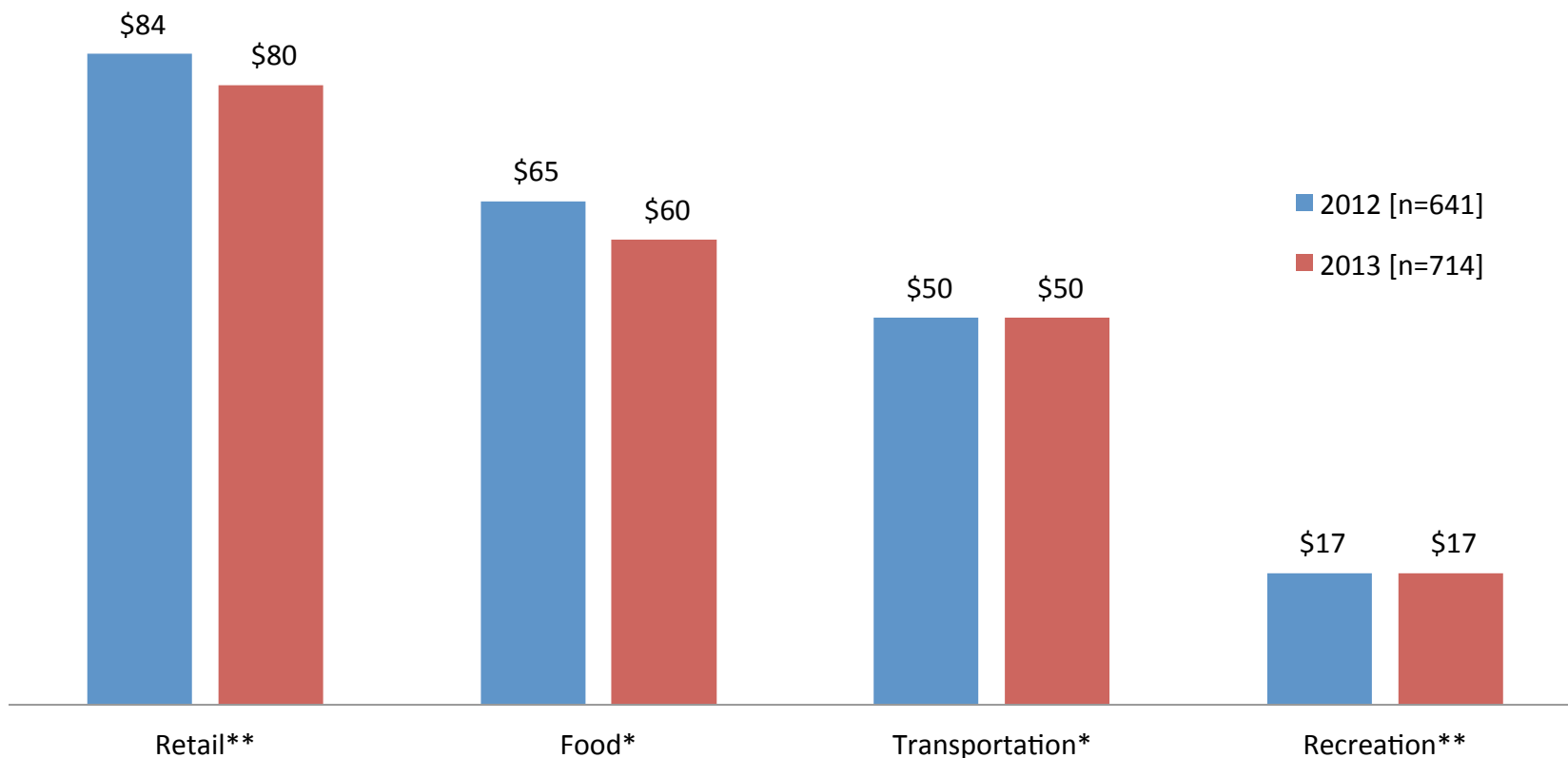
\*Median Expenditures

\*\*Mean Expenditures



# 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

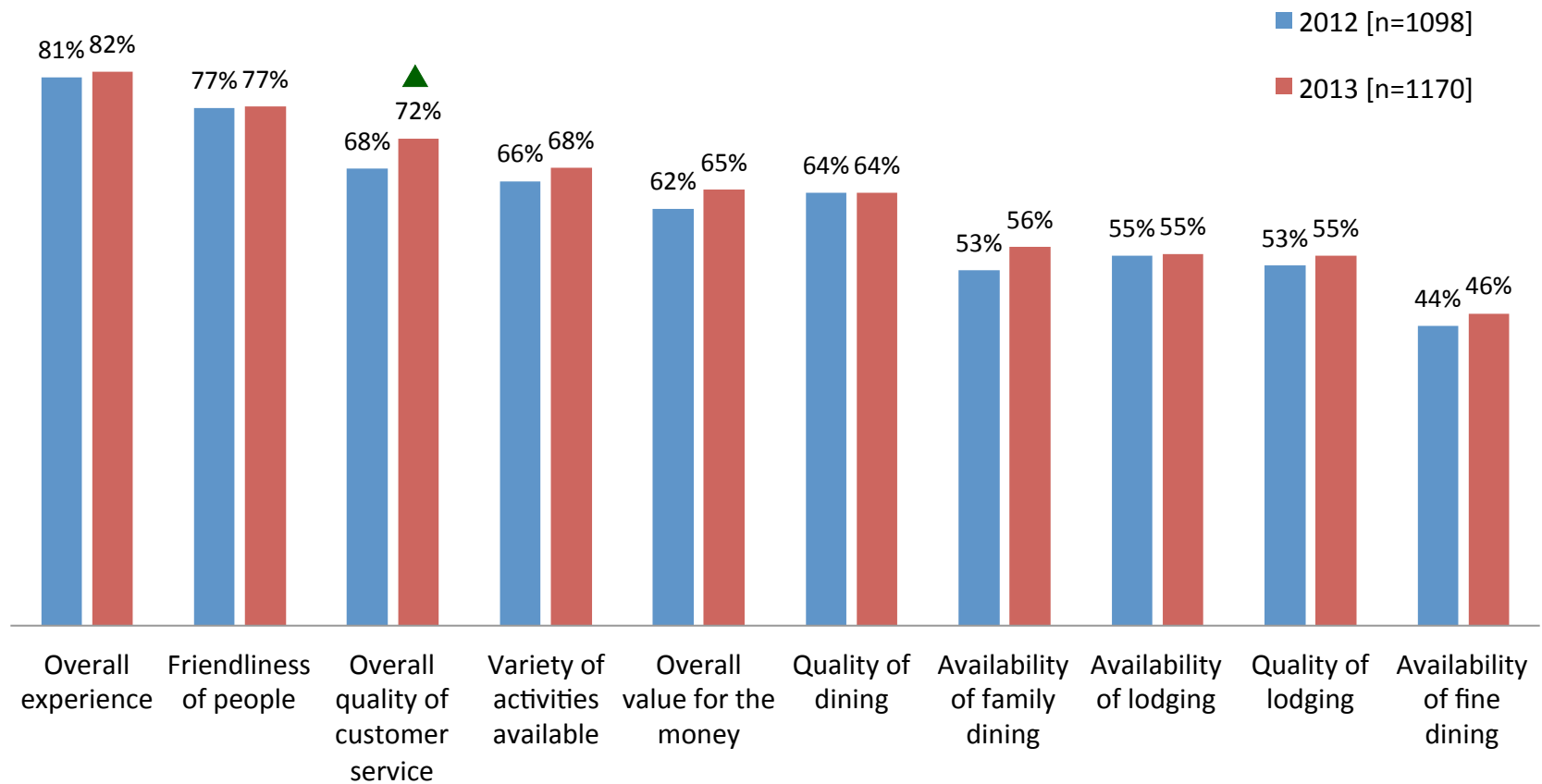
▲ ▼ notes significant difference between 2012 and 2013 at the 95% confidence level

# Trip Evaluation



# Maine Compared to Other Destinations – Overnight Visitors

## Top 2 Box Rating – “Better than Others”

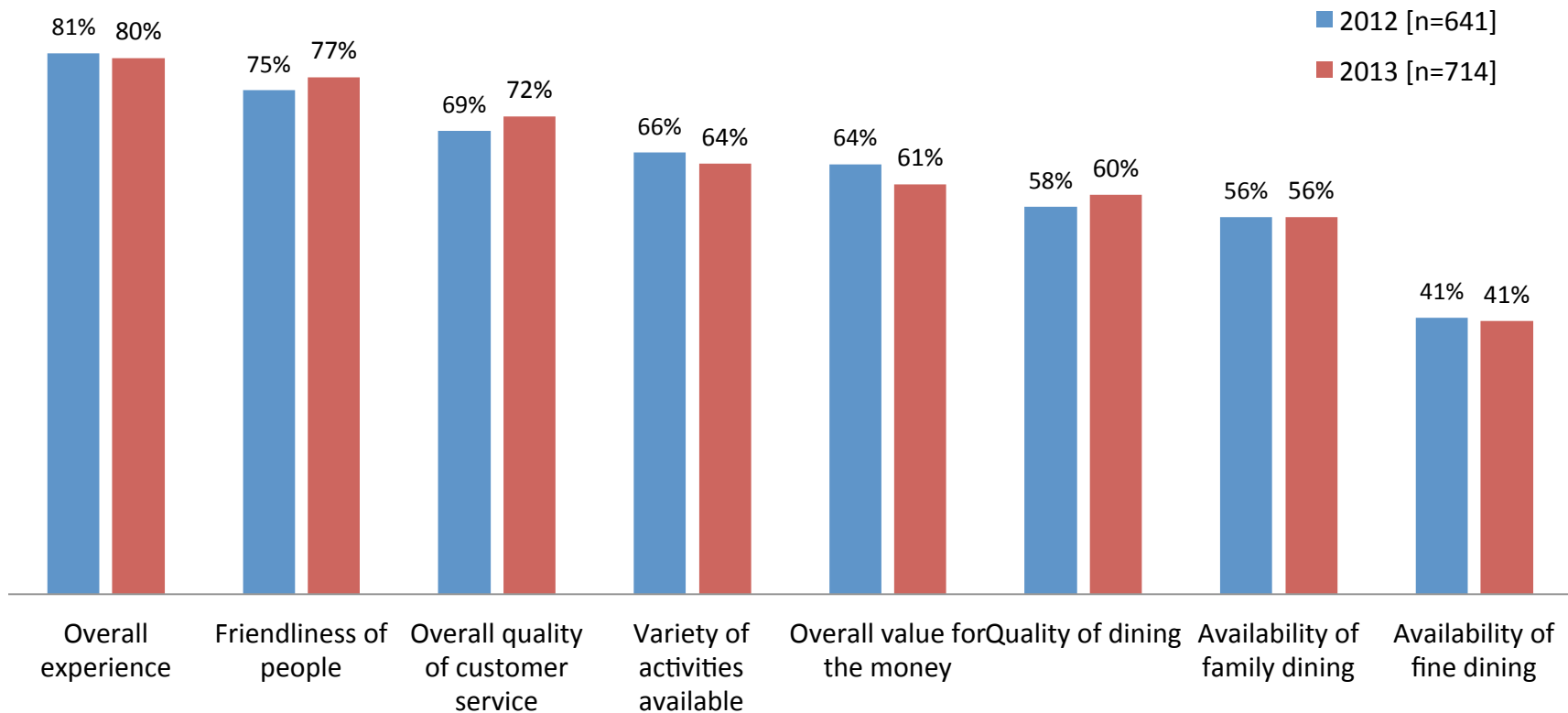


Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.

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

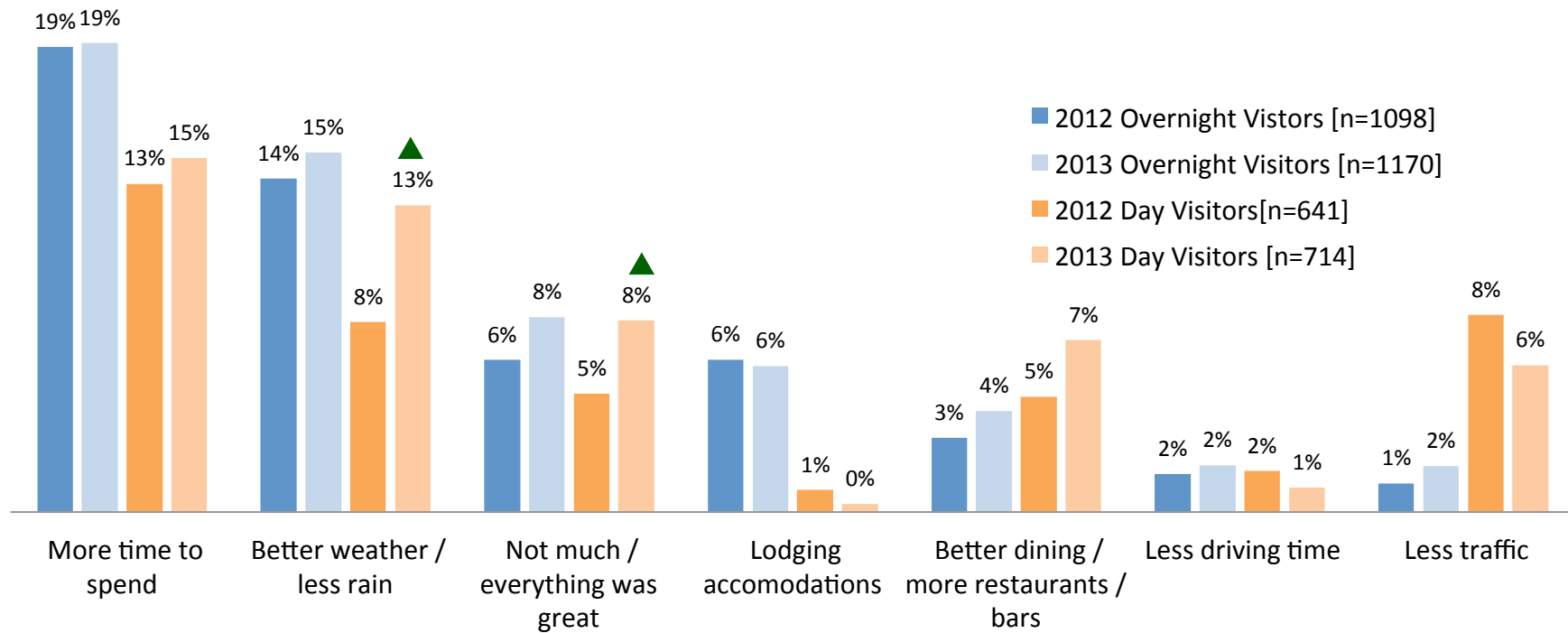
# Maine Compared to Other Destinations – Day Visitors

## 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.

# Aspect of the Trip that Could Have Been Better

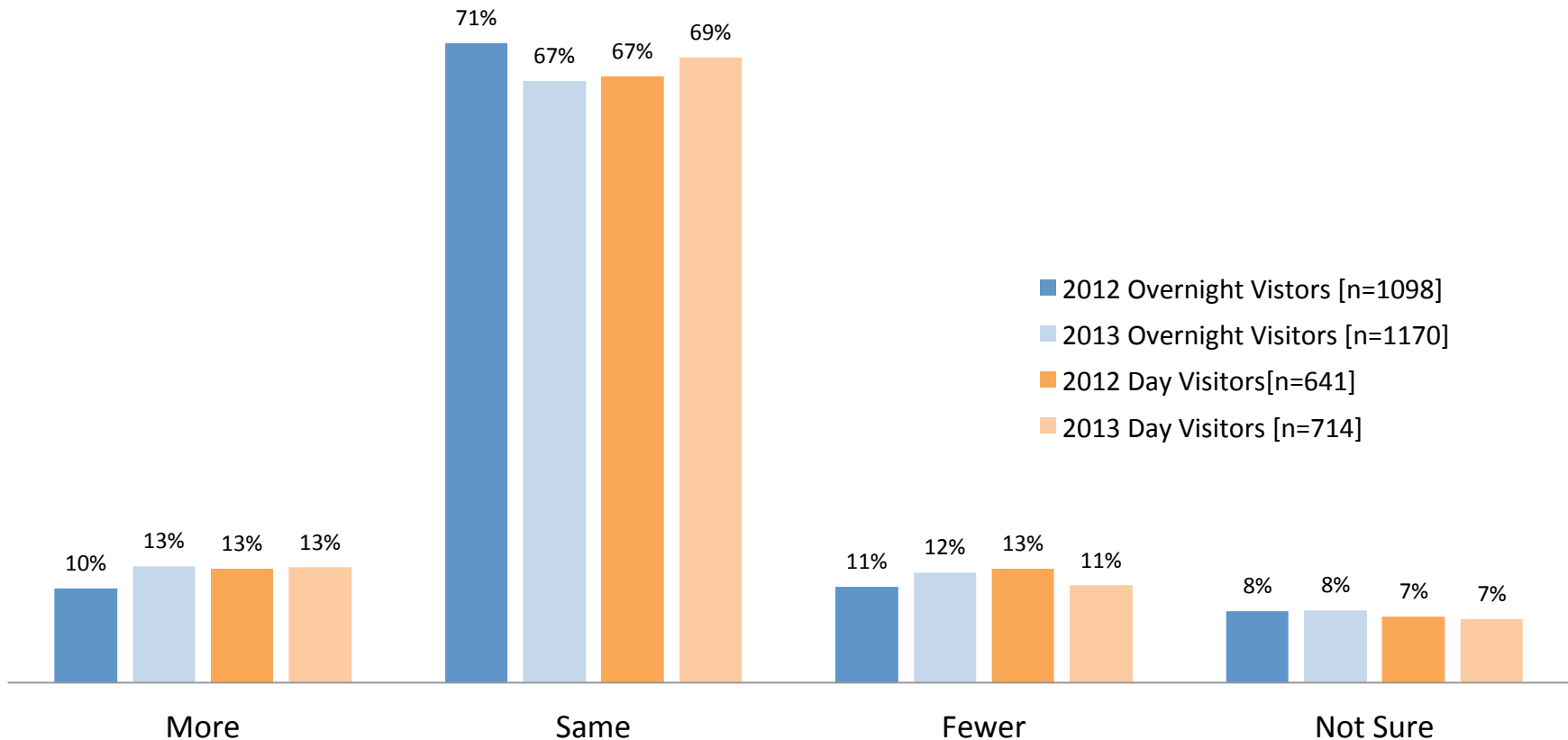


# Future Travel



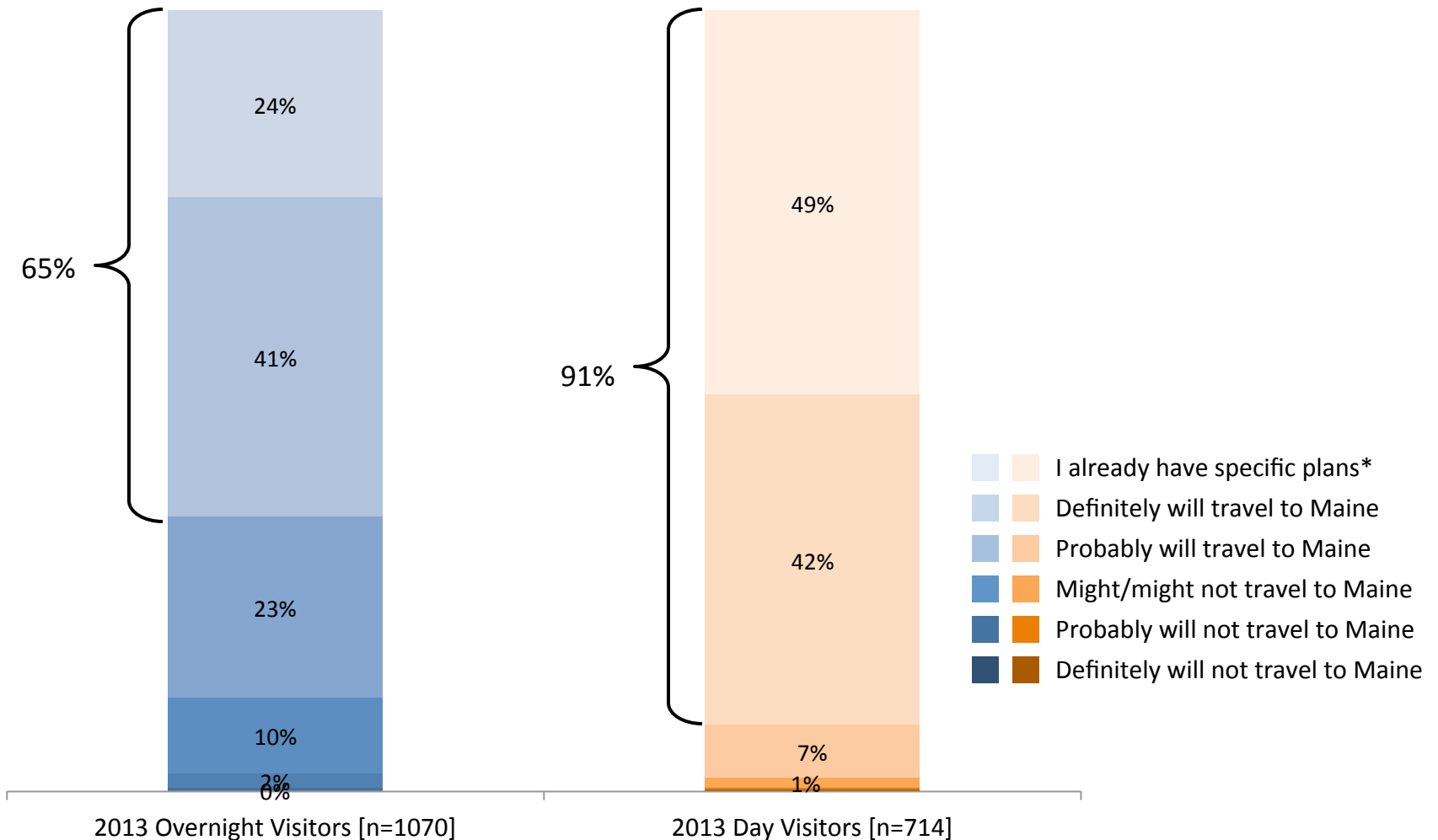
# Future Intentions for Leisure Trips to Anywhere

## Overall Leisure Trips Planned in Comparison to Last Year



# Future Travel to Maine

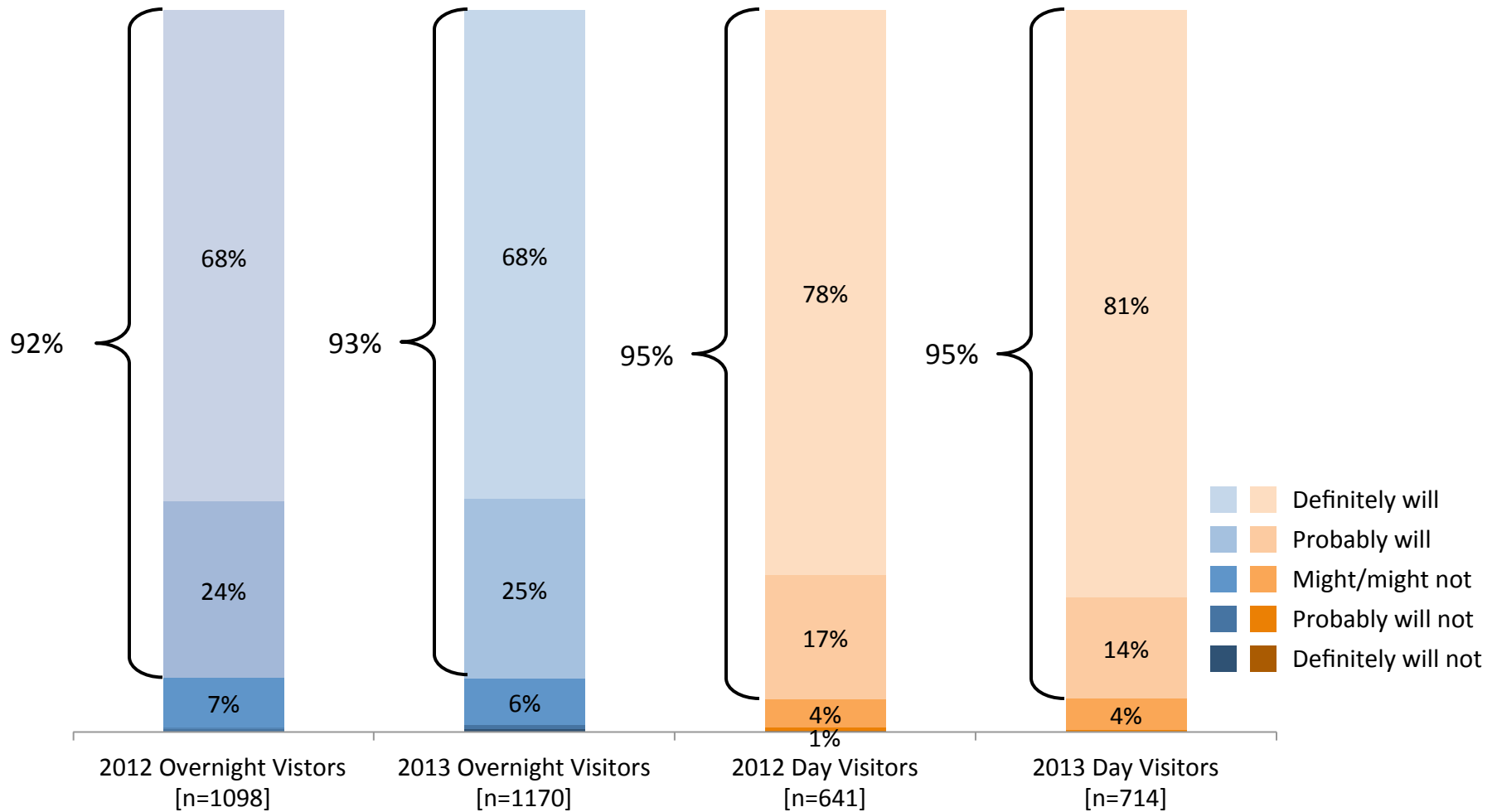
## Likelihood of Trip to Maine in Next Two Years





# Recommend a Trip to Maine

## Likelihood of Recommending a Trip to Maine to Friends and Family





DPA  
201 Lafayette Center  
Kennebunk, ME 04043  
207.985.1790  
[www.digitalresearch.com](http://www.digitalresearch.com)