

Maine Office of Tourism Visitor Tracking Research

Fall 2014 Seasonal Topline

Prepared by



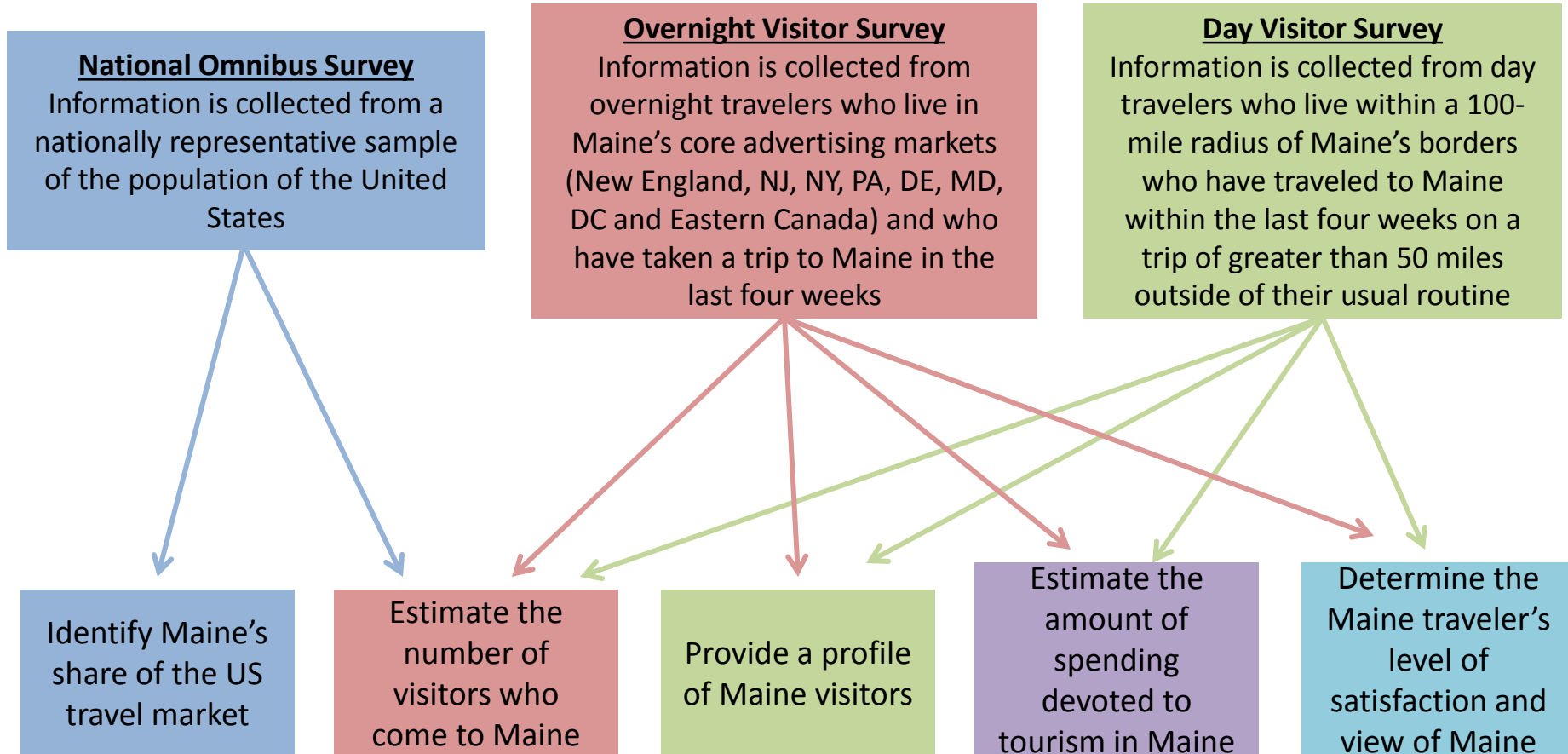
January 2015

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 September through November 2014. At the conclusion of the 2014 travel reporting season, adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

- Nationwide overnight leisure travel from September to November 2014 was up slightly when compared with the two prior Fall seasons. Similarly, Maine showed an increase in tourism-related overnight visitation to the State, as well as an increase in day visitation. Though the relative cost of travel remains fairly high (as evidenced by the Travel Price Index continuing to exceed the Consumer Price Index), falling gas prices and favorable weather conditions may have given Maine travelers an extra push this Fall season.

Executive Summary

- After ongoing year-over-year increases in the proportion of overnight visitors from Canada during 2012 and 2013, these gains appear to be declining in 2014. The Winter/Spring season, the Summer season, and now the most recent Fall season all showed drops in the *proportion* of overnight visitation sourcing from Canada. One potential explanation for this drop is the less favorable Canadian exchange rate. After peaking in 2012 the exchange rate has experienced a slow decline since, arriving at a Fall 2014 average seasonal rate of 0.8943 (as compared to 1.0125 during the same time period in 2012). Considering Canadians' high propensity to shop and stay in paid accommodations (more so than American visitors), a declining exchange rate could negatively impact their decision to travel in Maine.

Executive Summary

- Following on the year-over-year increases seen during the 2014 Winter/Spring and Summer seasons, the proportion of visitors coming to Maine for the first time this past Fall is also higher than for last Fall (2013). This will signal an overall year-end increase in the proportion of first-time overnight visitors from 2013 to 2014 and an encouraging introduction of Maine to many new visitors. This most recent Fall season also saw an increase in the proportion of visitors from New York, Pennsylvania, and Ontario – states/provinces that are more likely to send first-time visitors to Maine (as opposed to repeat visitors). It is possible that the increase seen in first-time visitors is tied to the higher proportion of visitors coming from these areas further away from Maine.

As seen in previous seasons, these first-time visitors are more likely to indicate that several aspects of their Maine vacation exceeded their expectations, yet less likely to state future intent to visit the State. Further exploration into their experiences and any potential blocks to future visitation to the State is warranted in order to examine ways in which to entice them to return to Maine after their first visit.

Executive Summary

- The Maine Beaches region continues to be the State's main draw during the Fall season, with 21% of overnight visitors and 35% of day visitors listing this region as their primary destination in Maine. These proportions mirror the ones seen during the Summer season when a beach environment would seemingly appeal to more visitors. During the Fall, the Maine Beaches region is most popular among repeat visitors, leisure travelers, and visitors from New England.
- Maine continues to receive extremely favorable evaluations from its visitors. The structure and rating scale used for these evaluative measures were revised in 2014, making any direct comparisons to prior years not possible. However, similar to the 2014 Winter/Spring and Summer seasons, the general categories receiving the highest ratings continue to center on visitors' overall experience and the service and friendliness of the Maine people. More than half of Fall overnight visitors stated that their vacation exceeded their expectations for nine of the 15 listed attributes. More than half of day visitors felt similarly about ten of the 15 listed attributes. For both overnight and day visitors, the highest ratings were given for *overall experience*, *friendliness of the people*, and *overall quality of customer service*. The *quality of dining* in Maine also garnered high ratings from visitors, more so than during past seasons.

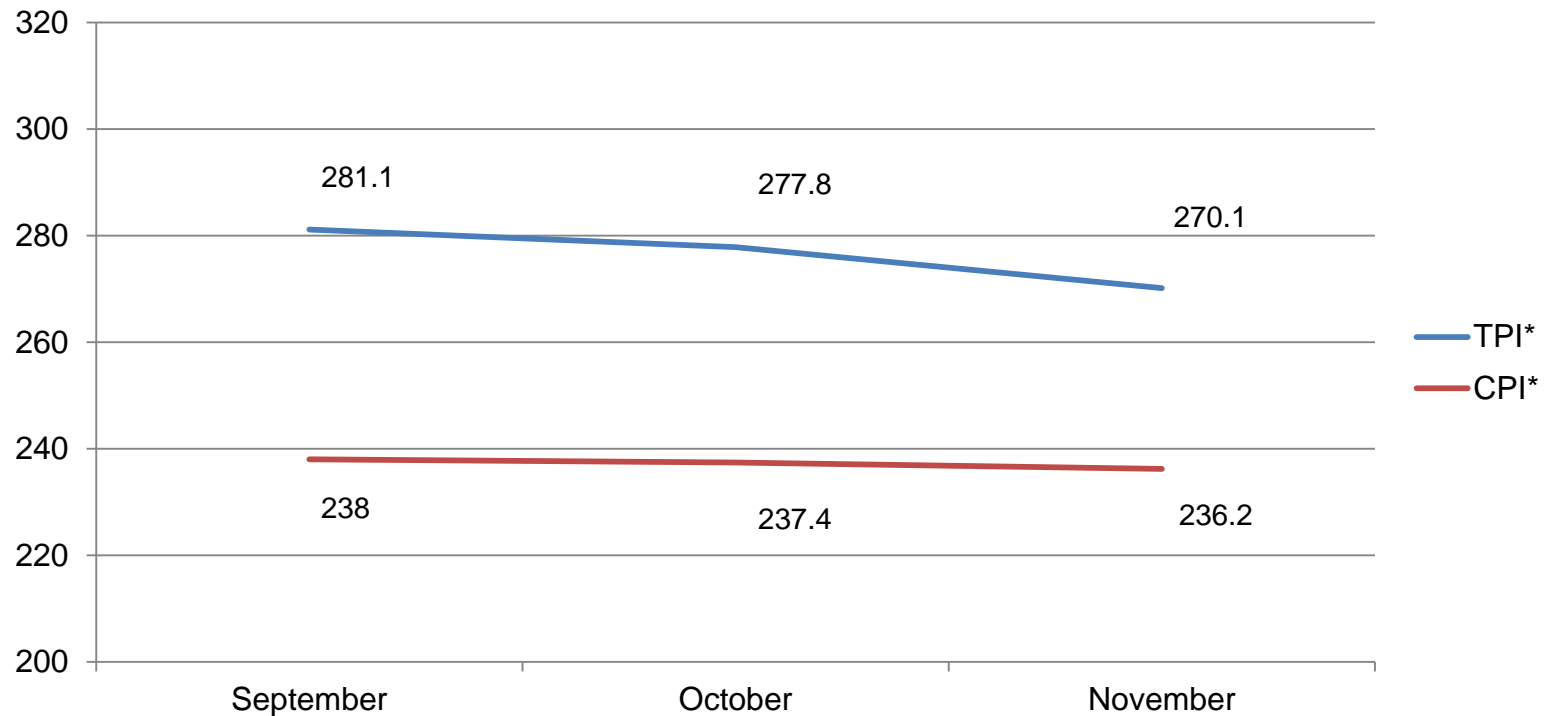
2014 Fall Season Travel Context



The Travel Price Index continues to exceed the Consumer Price Index, resulting in a continued high cost of travel.

- Though decreasing throughout the preceding summer and as the Fall season progressed, TPI still remains nearly 2% higher than the Fall 2013 index.

Consumer Price Index and Travel Price Index



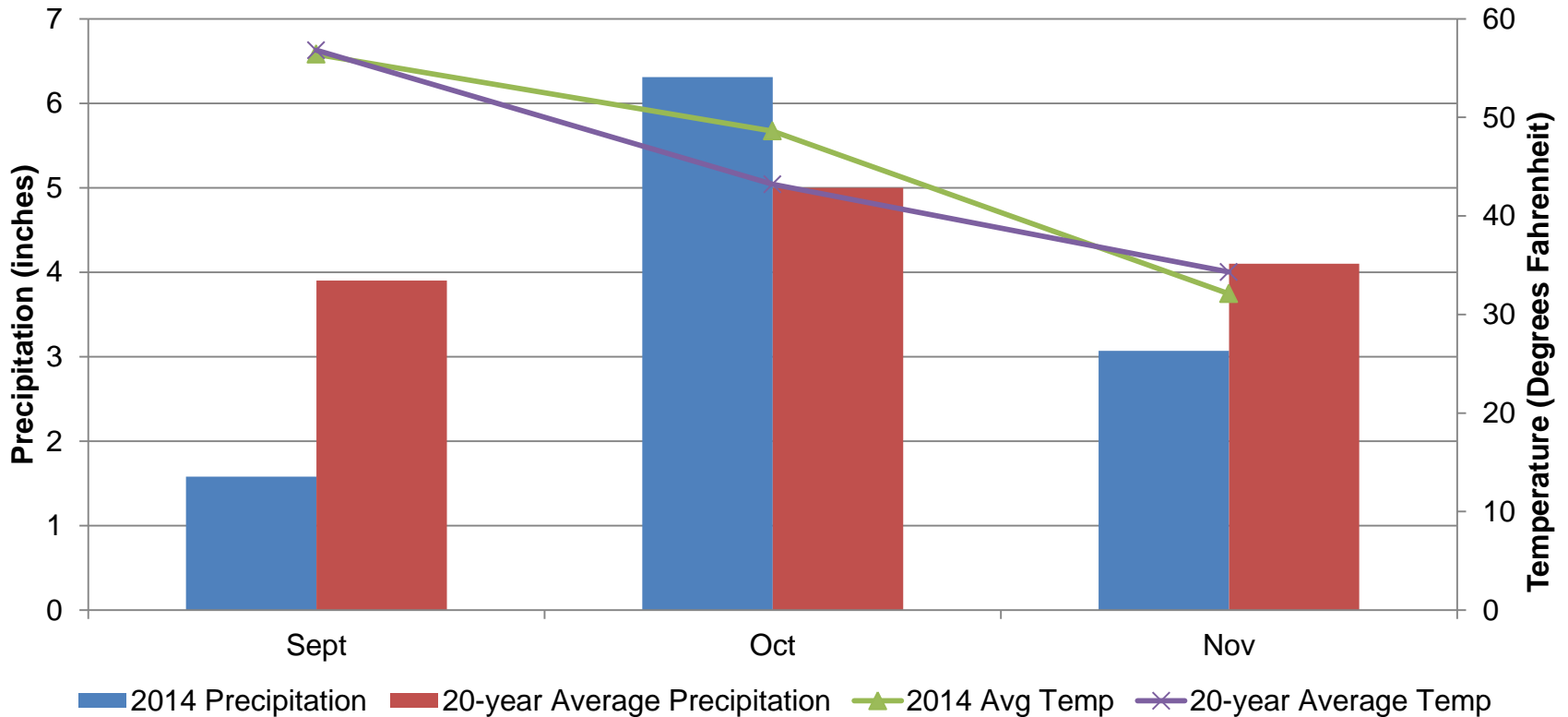
*Note: base years for Consumer Price and Travel Price Indices are 1982-1984=100

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

Maine precipitation and temperature during the Fall season is just about on par with historical averages.

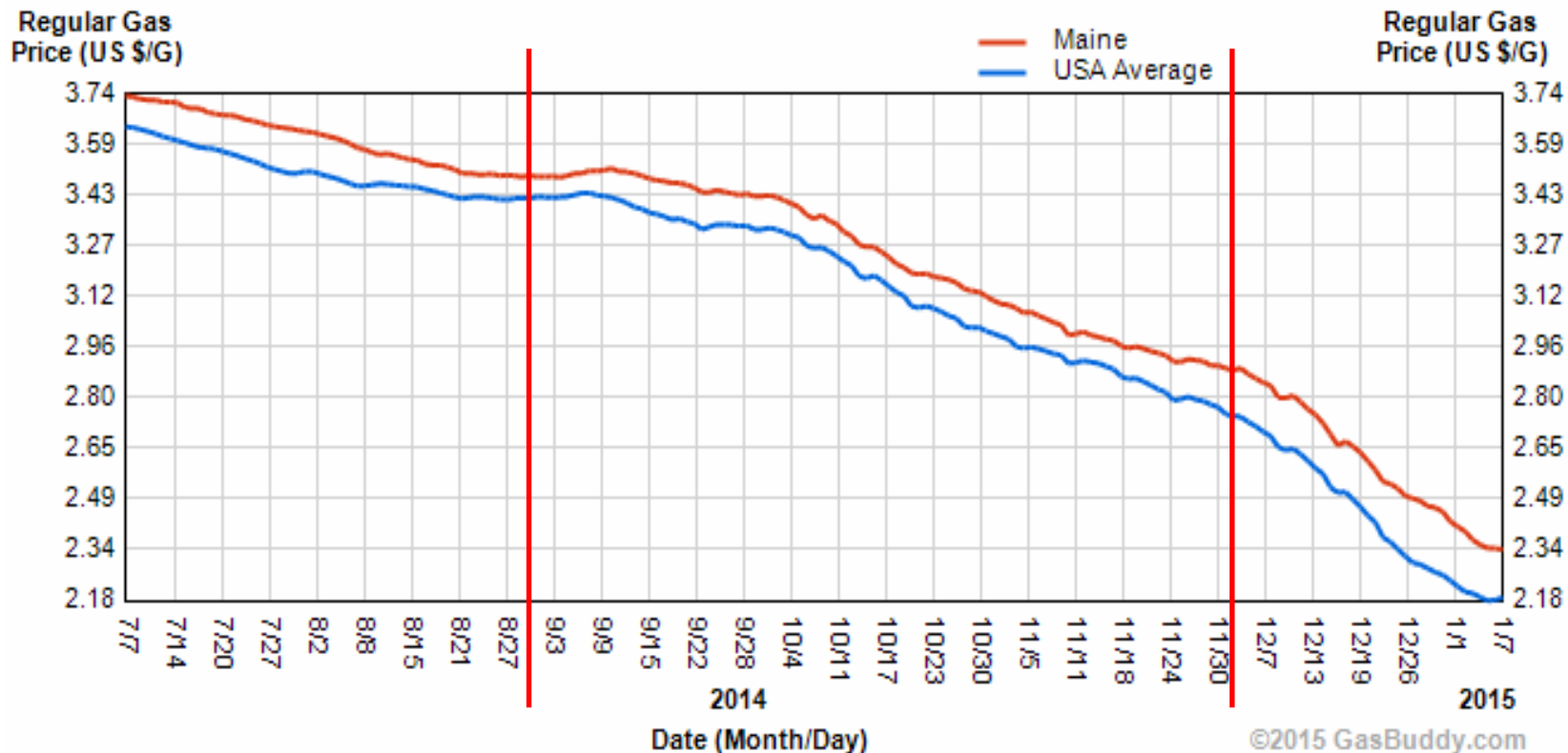
- Though October showed an above average amount of precipitation, September and November fell below average.

Precipitation and Temperature – Maine Fall 2014



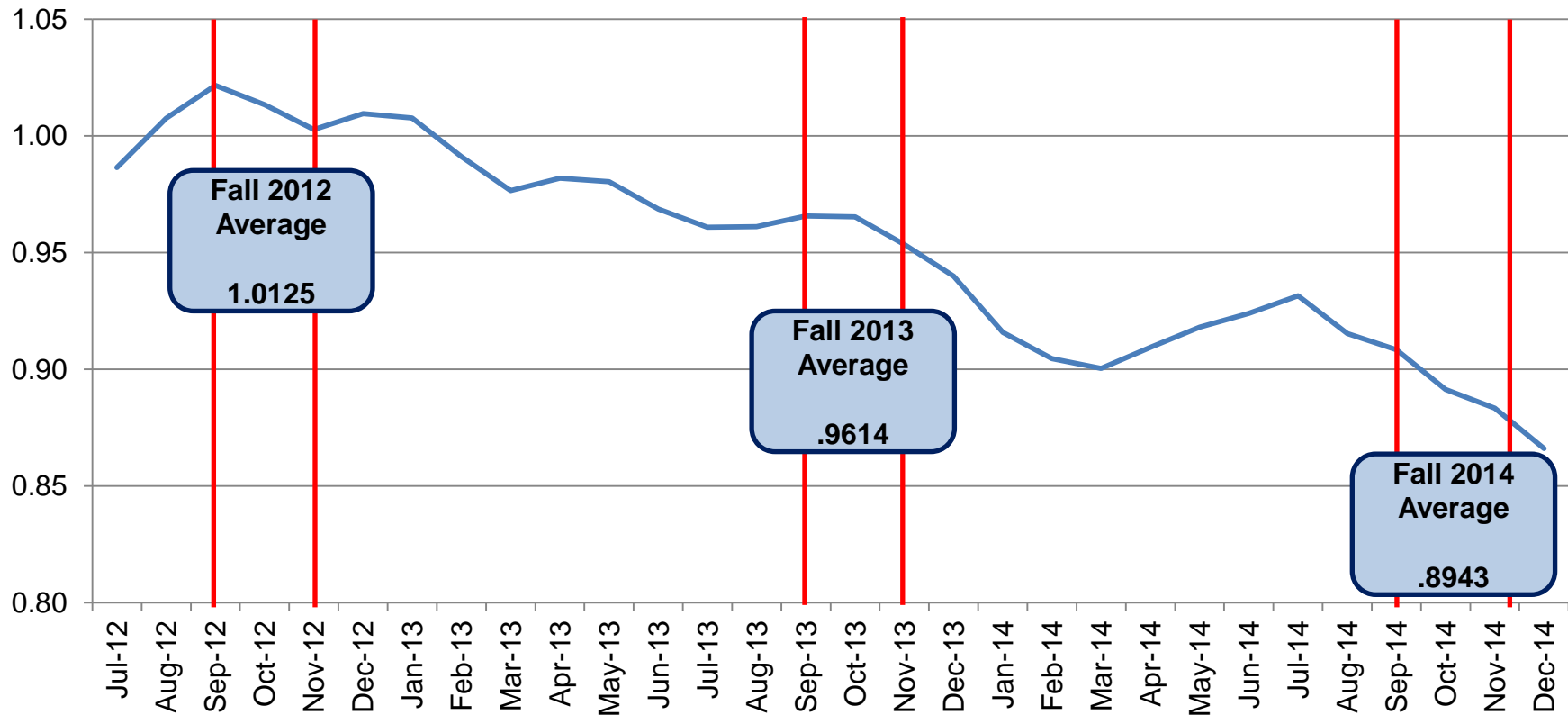
Maine gas prices remained above US average prices during the Fall, but continued a steady decline throughout the season which has continued into the winter months.

6 Month Average Retail Price Chart



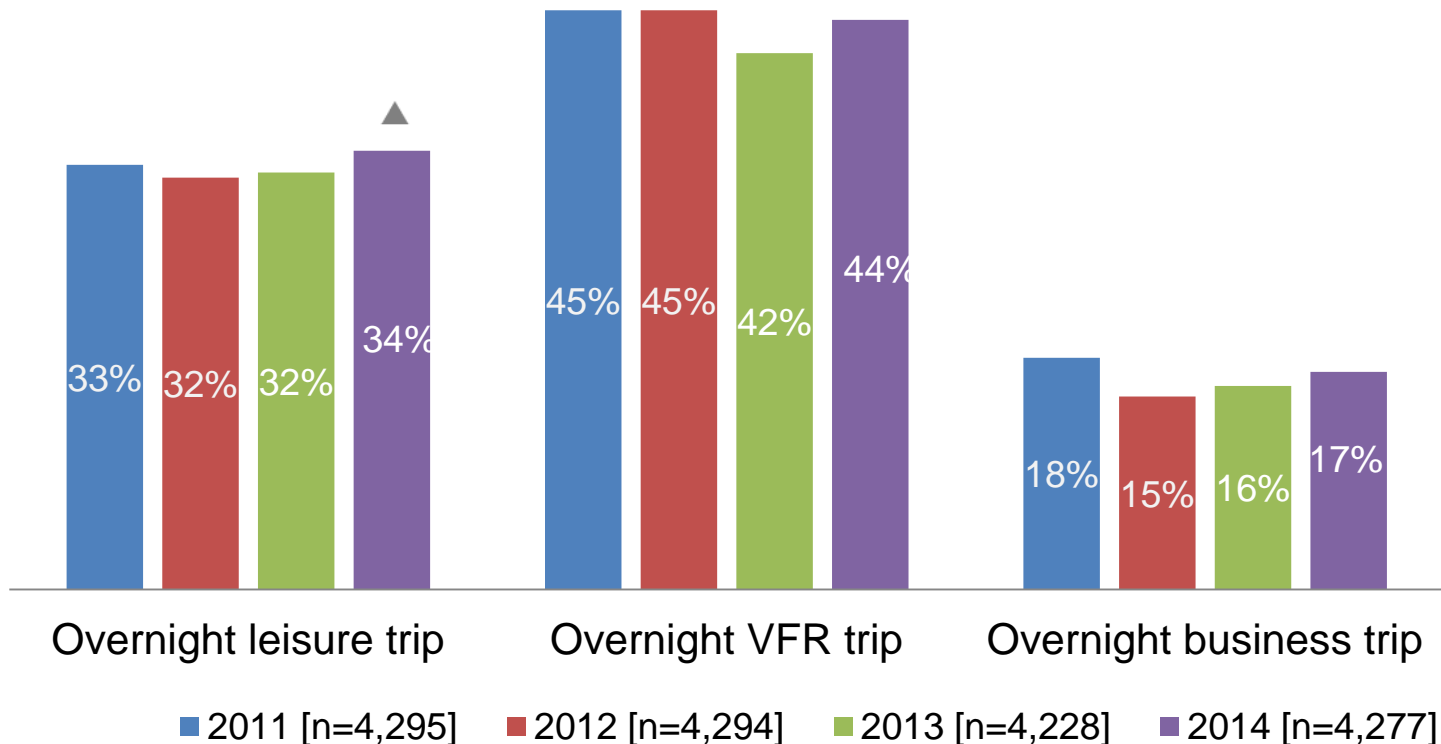
The Canadian exchange rate continued the decline that began during the early months of 2013, dropping to a Fall season rate of 0.89.

Canadian Exchange Rate



There was a slight increase in leisure travel nationwide, coupled with stable travel rates for business travelers and VFR travelers.

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

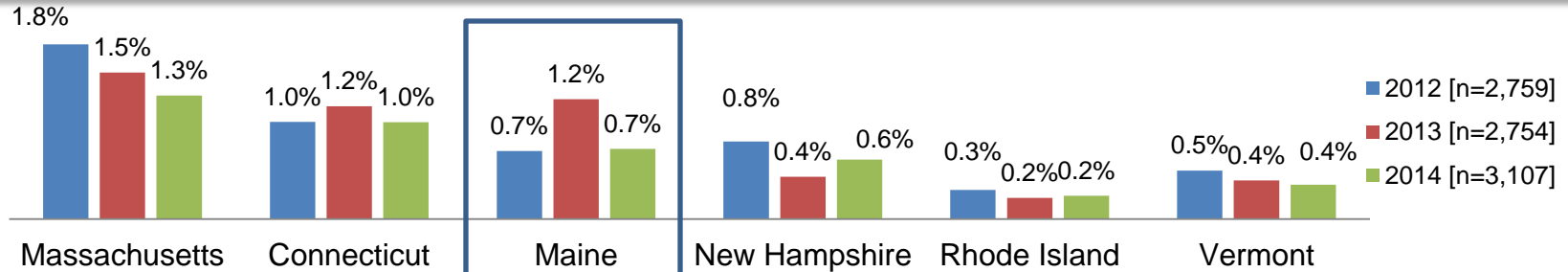


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

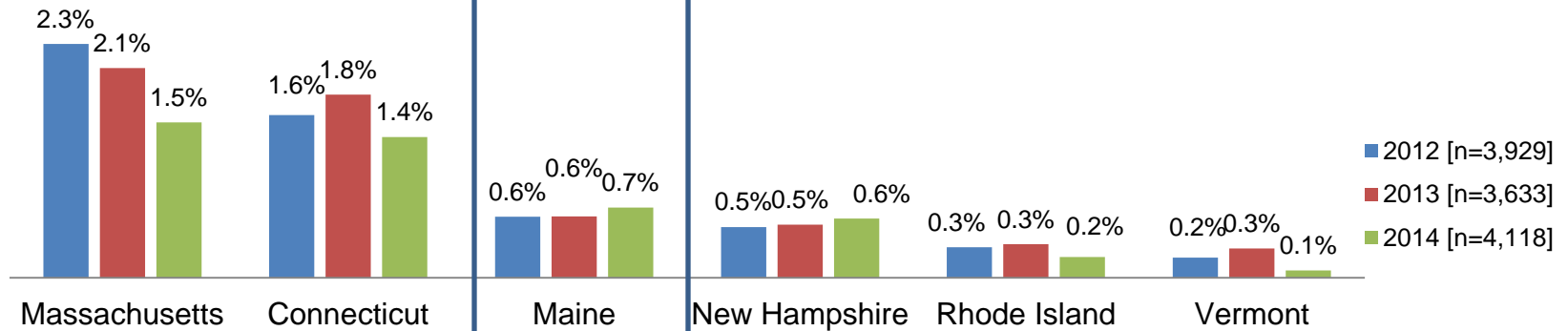
▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

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

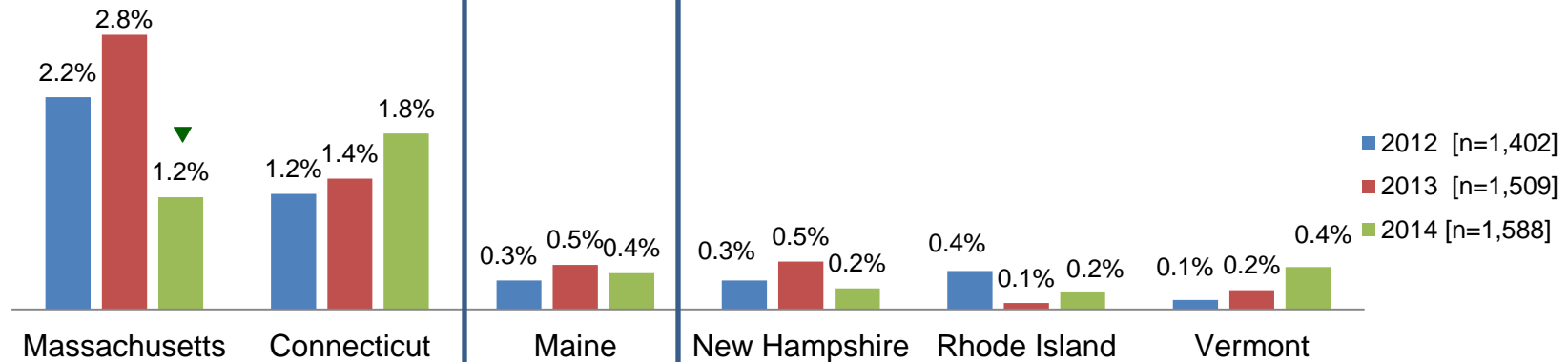
Overnight Leisure Trips



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 2013 and 2014 at the 95% confidence level

2014 Fall Season Highlights



Estimated overall visitation to Maine increased 7% between the 2013 and 2014 Fall seasons.

Note: Visitation estimates provided here are preliminary and reflect visitation from September through November 2014. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

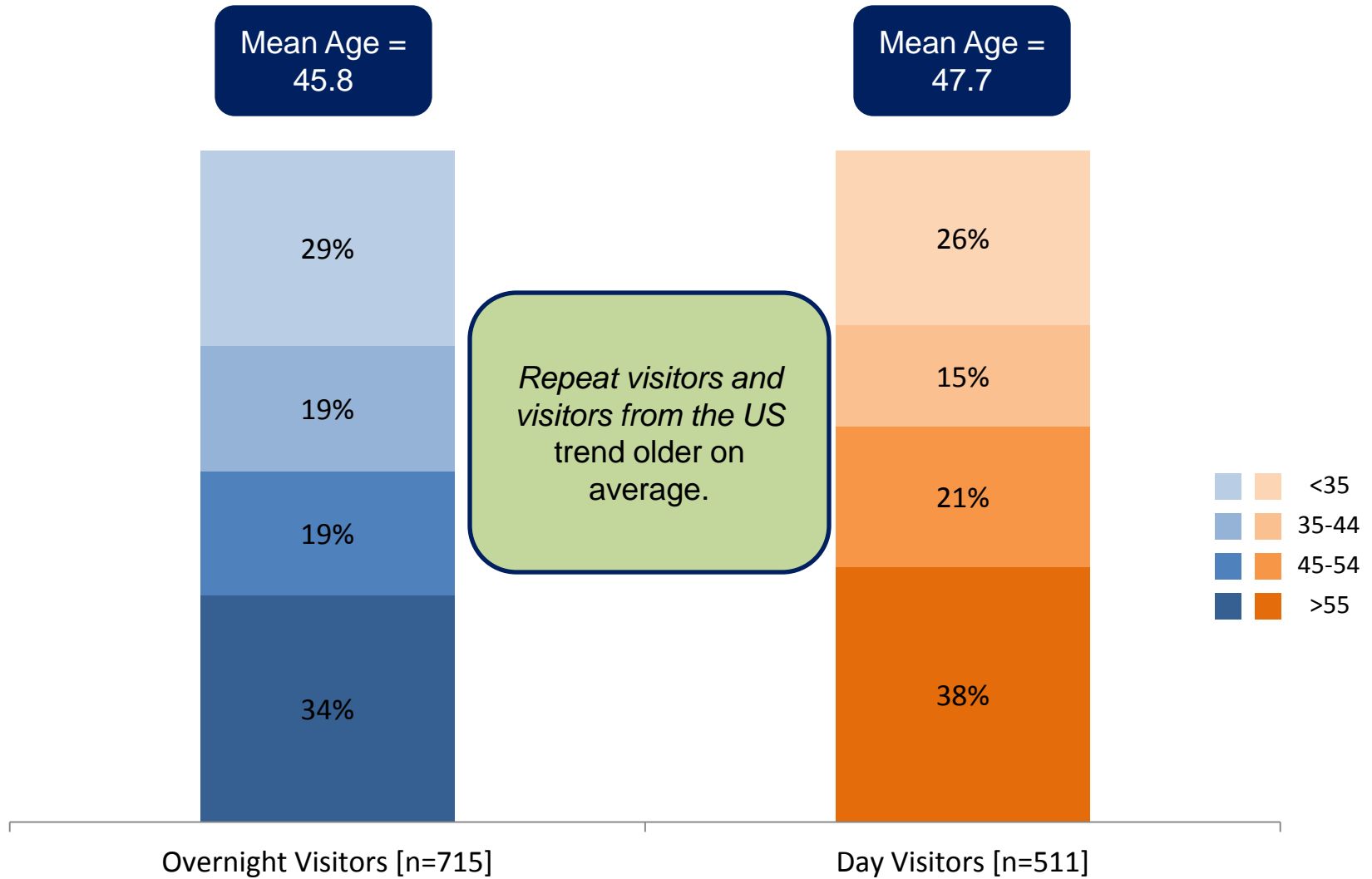
Visitation Estimates*	Fall 2013	Fall 2014	% Chg
Total Estimated Visitation	8,107,326	8,671,836	+ 7.0%
<i>Overnight Visitors</i>	<i>4,787,224</i>	<i>5,192,308</i>	<i>+ 8.5%</i>
<i>Day Visitors</i>	<i>3,320,102</i>	<i>3,479,528</i>	<i>+ 4.8%</i>

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

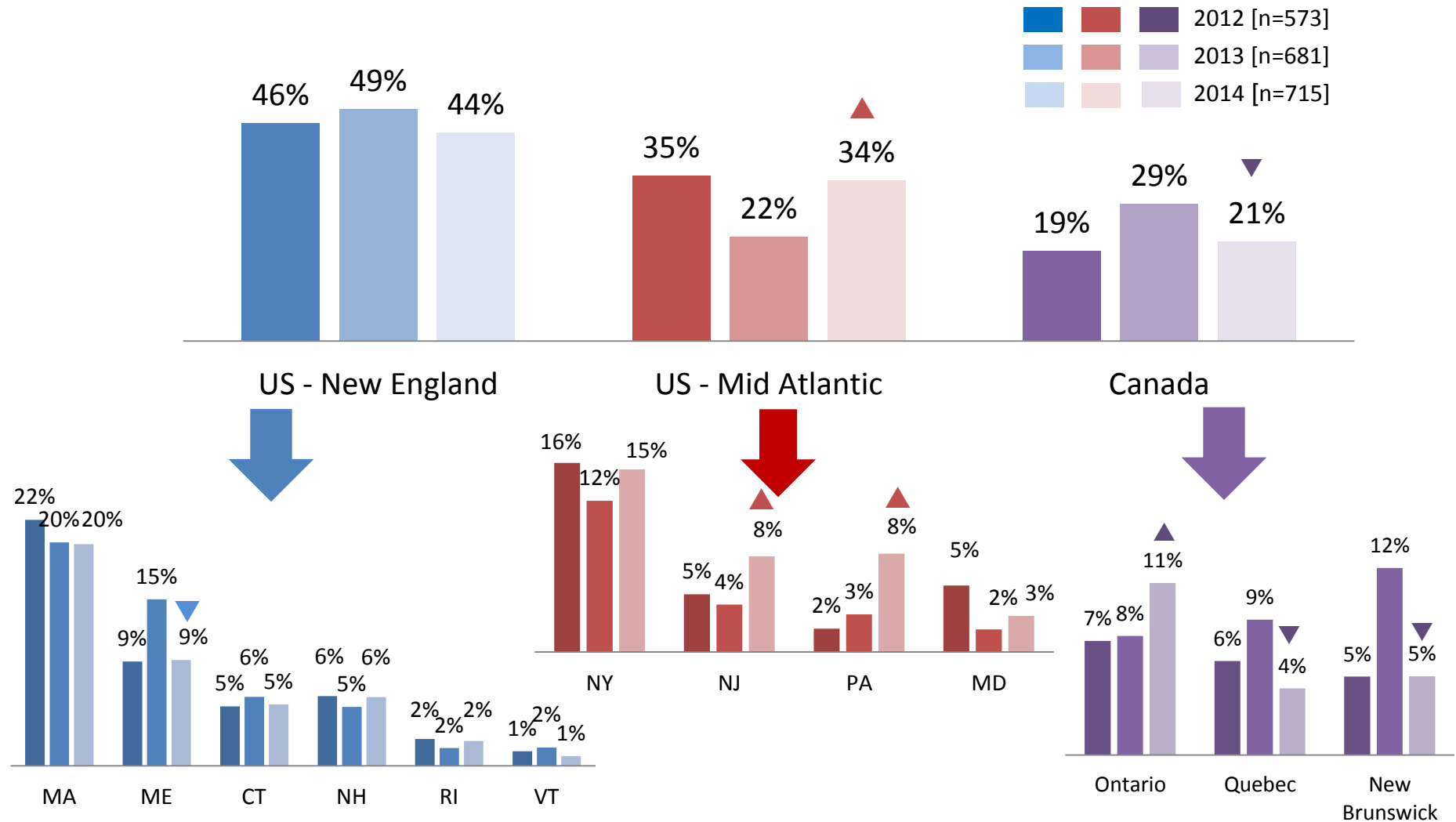
Tourism related trips include:

- 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.*

Fall visitors to Maine average in their mid-40s, with more than half over the age of 45.

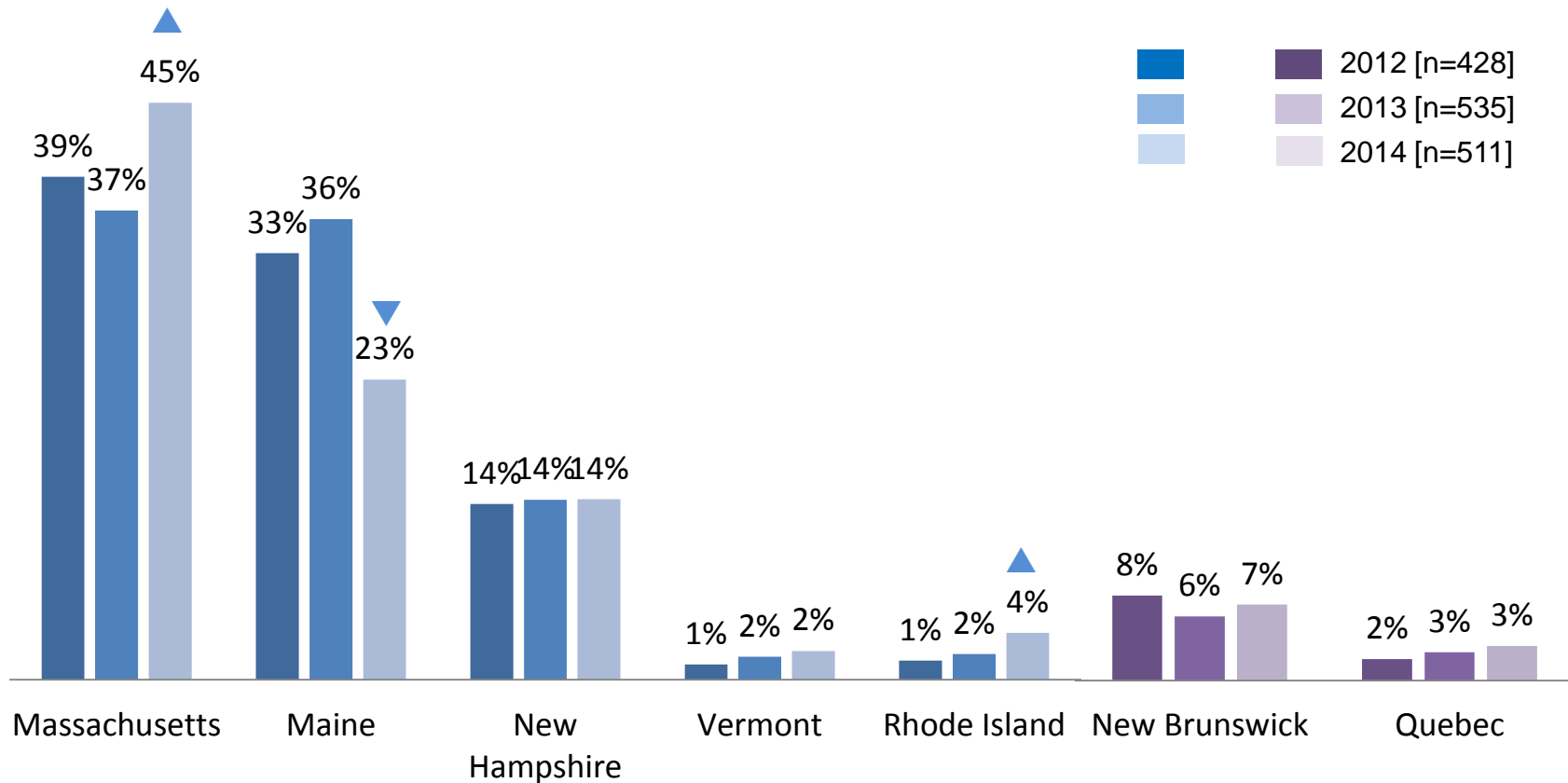


Fall 2014 showed a drop in the proportion of overnight visitors from Canada, similar to the year-over-year drops seen in the prior Winter and Summer seasons.



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

- Maine saw a slight decrease in the proportion of in-state Fall day visitors when compared to last year, while showing an increase in the proportion of day visitors from Massachusetts.

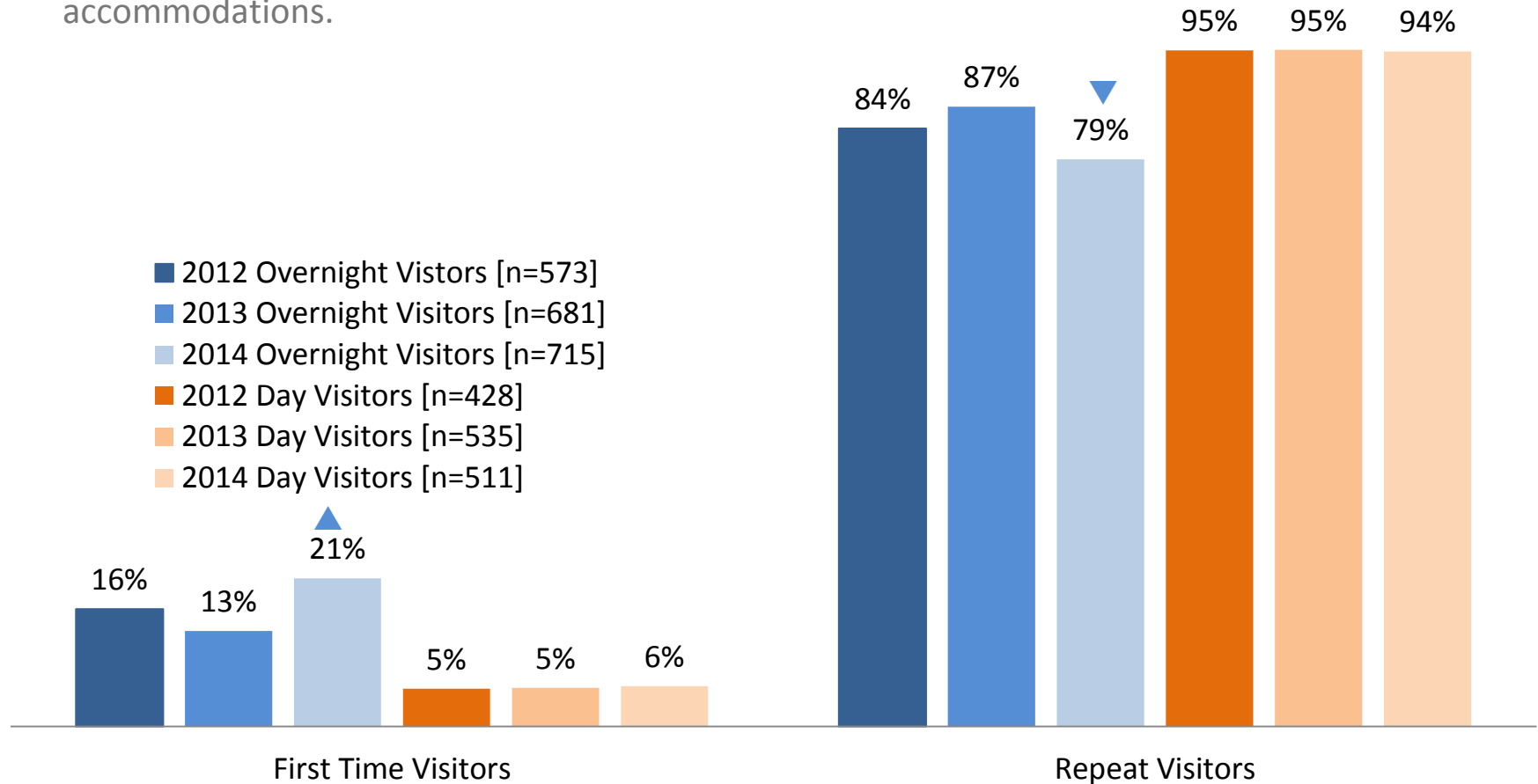


State/Province of Residence

▲▼ notes significant difference between 2013 and 2014 at the 95% confidence level

The 2014 Fall season saw an increase in the proportion of first-time overnight visitors, following increases seen during the 2014 Winter and Summer seasons.

- First-time overnight and day visitors both tend to be younger, while first-time overnight visitors are also more likely to be Canadian and have lower annual household incomes. They also tend to stay in Maine longer while visiting and are more likely to stay in paid accommodations.

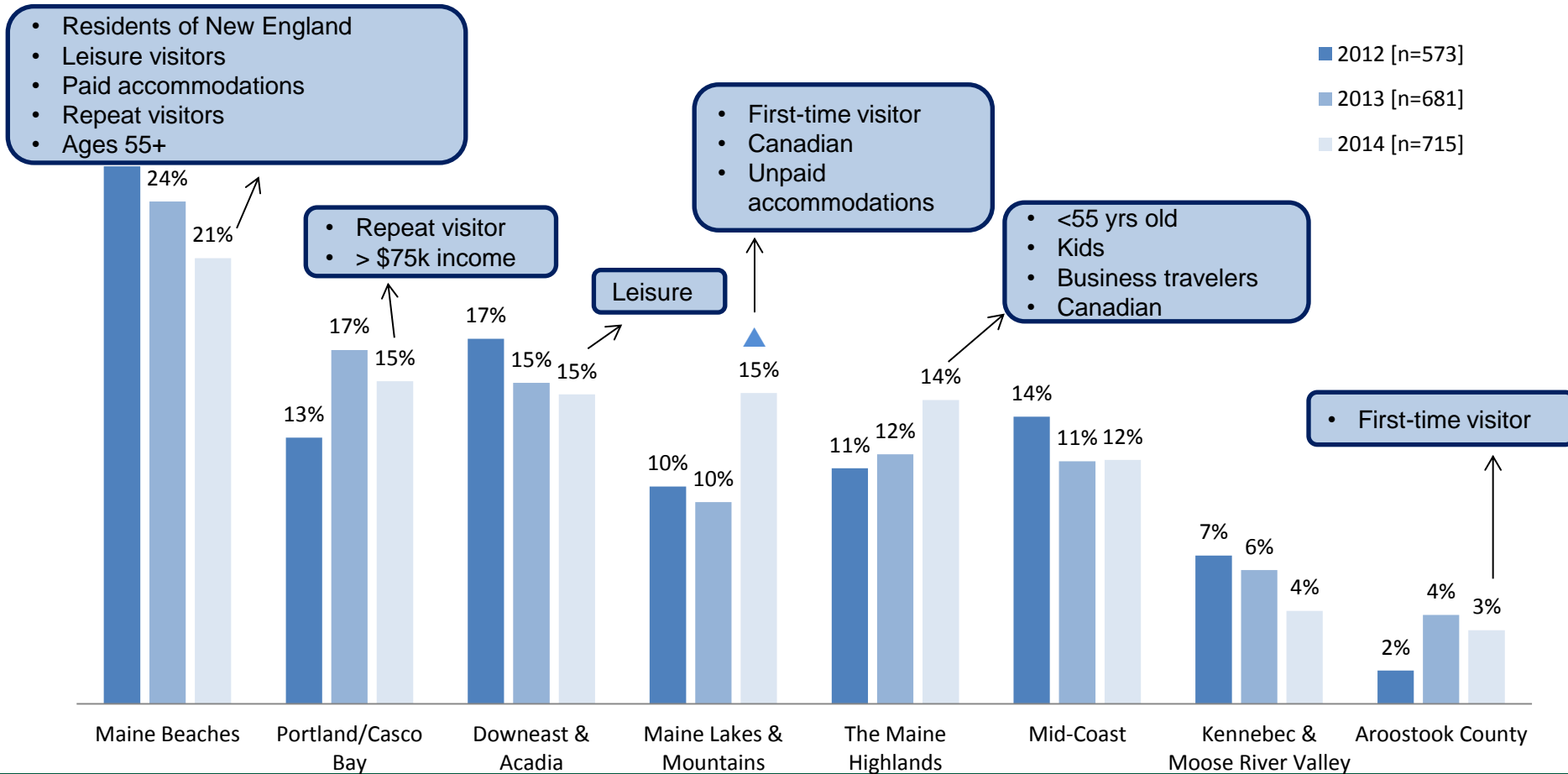


Overnight Q11, Day Q10. Was this your first visit to Maine?

▲▼ notes significant difference between 2013 and 2014 at the 95% confidence level

The Maine Beaches region was visited by one-fifth of Maine's overnight visitors during the 2014 Fall season.

- The Maine Lakes & Mountains region showed an increase in the proportion of visitors to its 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.



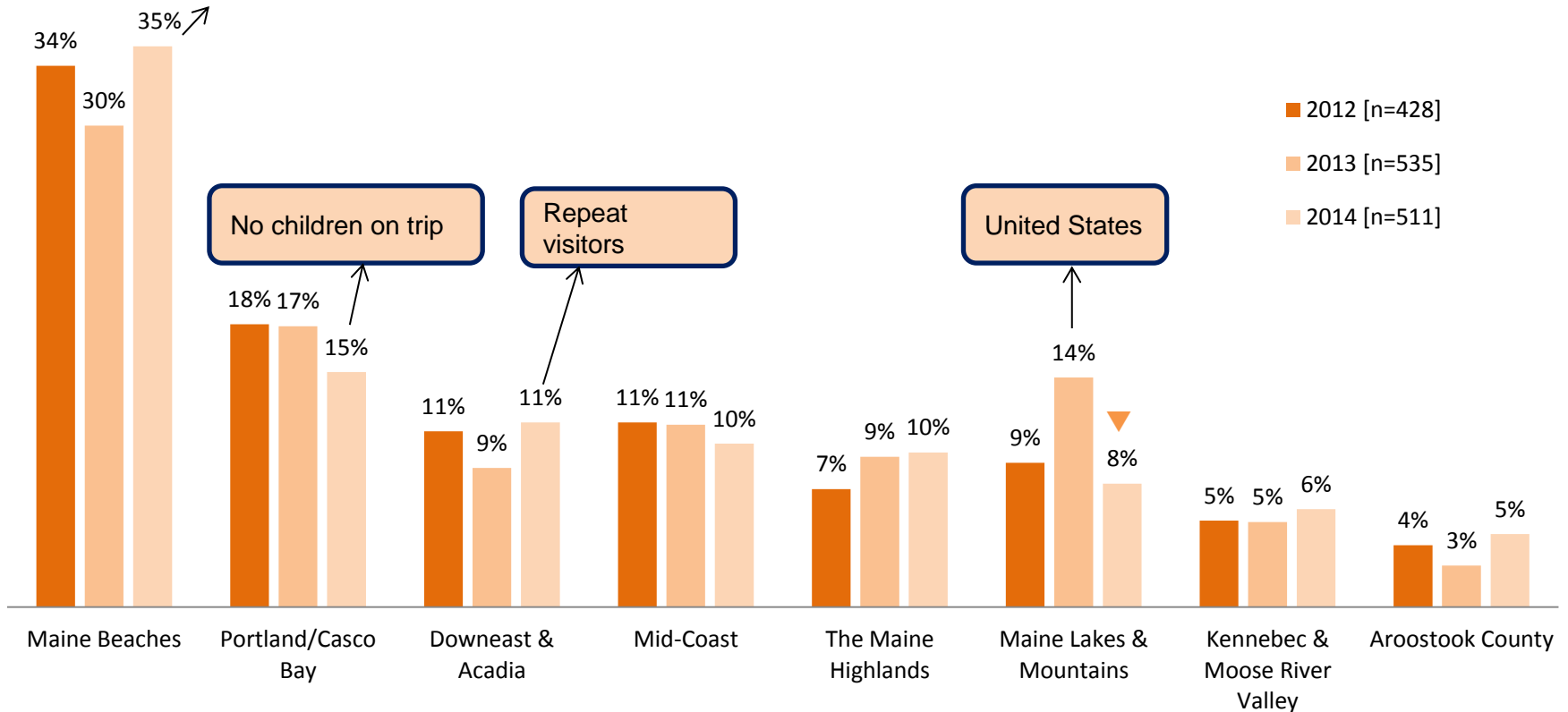
Overnight Q22. What region in Maine was your primary destination?

▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

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

- The popularity of various regions differs between different sub-groups, as shown in the chart below.

Residents of New England
Leisure Visitors

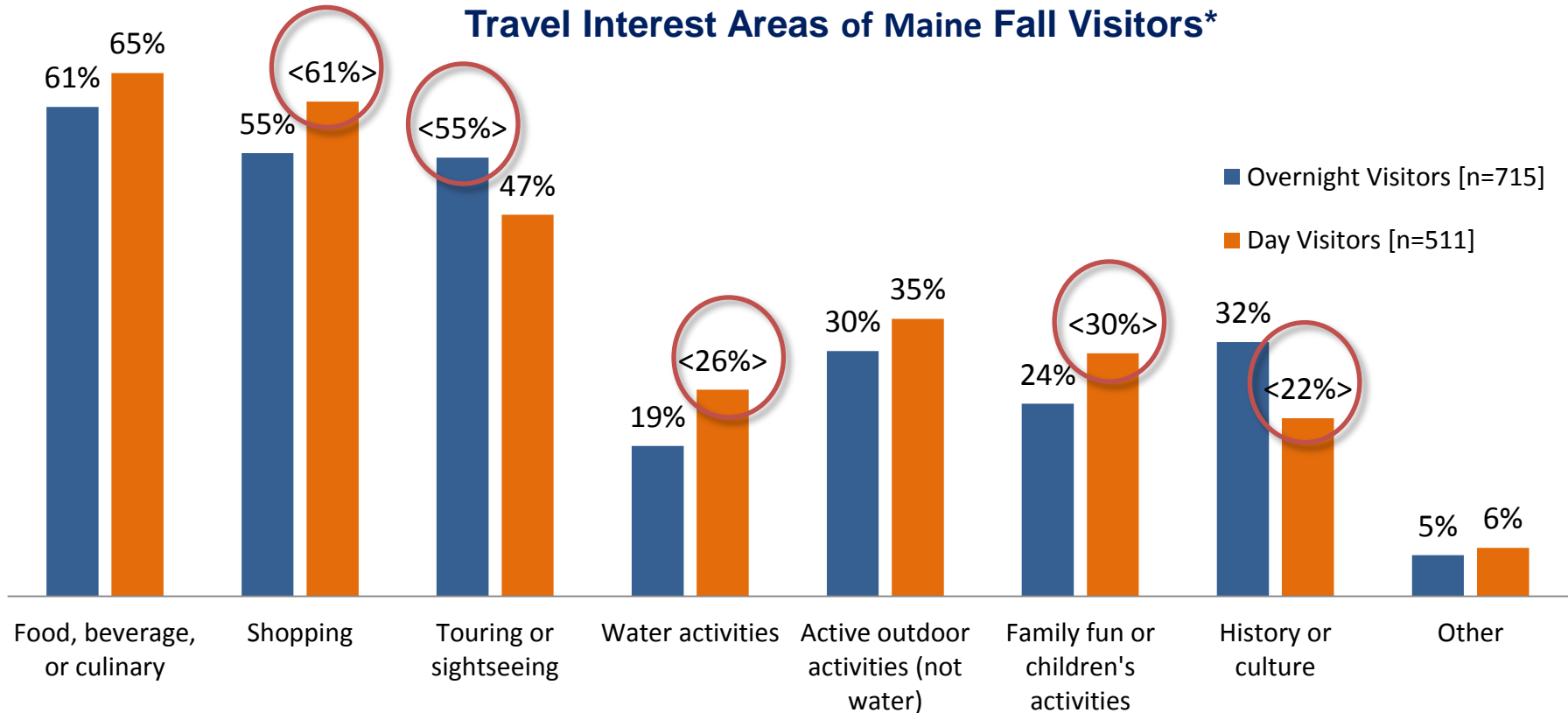


Day Q20. What region in Maine was your primary destination?

▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Most 2014 Maine Fall visitors were interested in exploring Maine's various *food/beverage/culinary* options or doing some *shopping*.

- Overnight and day visitors exhibit several differences in the interest areas they were looking to pursue while visiting Maine, as shown in the chart below.



Overnight Q29/Day Q17: Which of the following interest areas did you want to pursue during this trip to Maine?

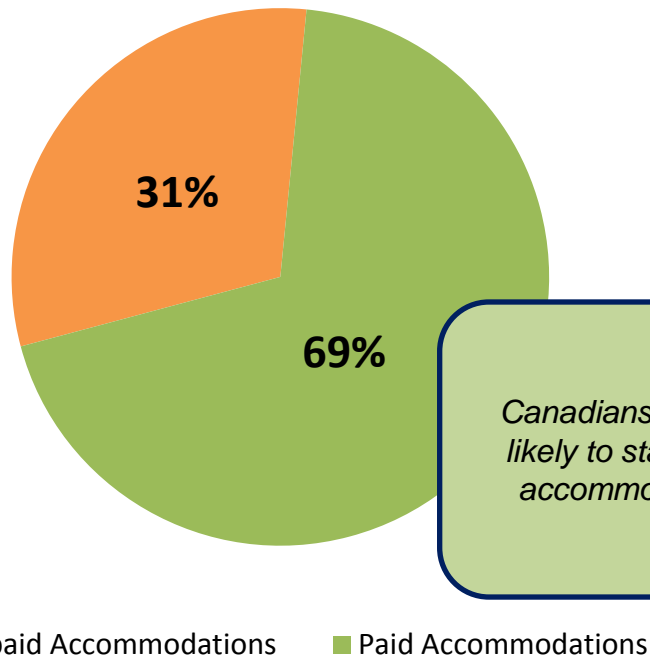
* This is a new question added in January 2014; therefore, there is no comparison to prior years.

< > signifies a significant difference between subgroups at the 95% confidence level

Two-thirds of overnight Fall visitors stayed in paid accommodations, mostly hotels/motels/resorts.

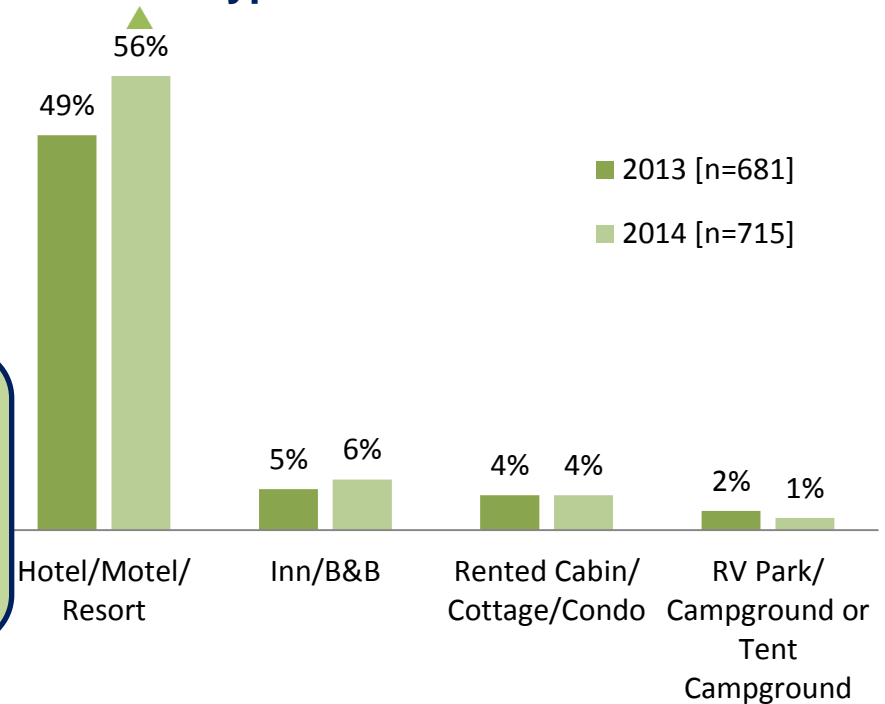
- On average, overnight visitors are staying in Maine for 3-4 nights. The average length of stay is longer for first-time visitors, those traveling with children, and those from outside New England.

Type of Accommodation
[n=715]



Canadians are more likely to stay in paid accommodations.

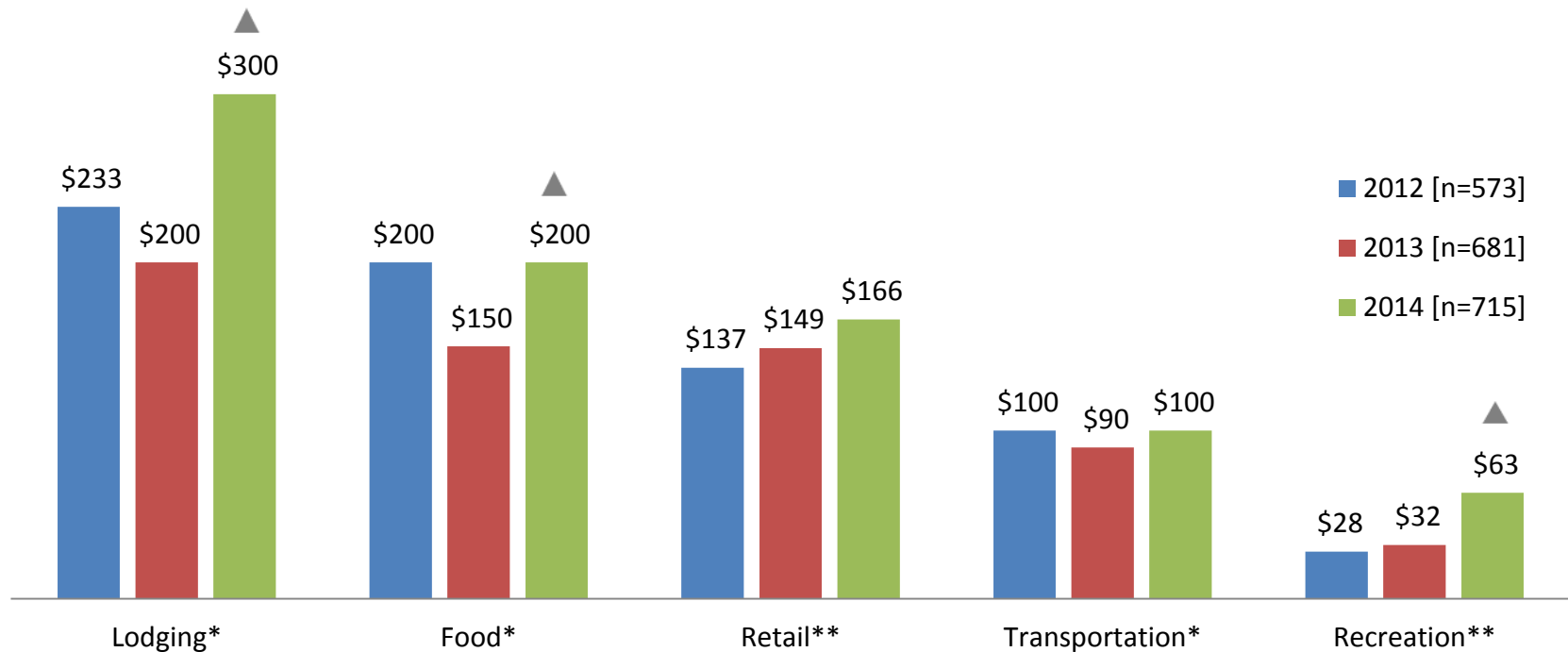
Type of Paid Accommodation



Average Length of Stay: 3.3 Nights

Lodging and food expenditures continue to make up the greatest share of expenditures among Fall overnight visitors.

Average Spending per Travel Party – Overnight Visitors



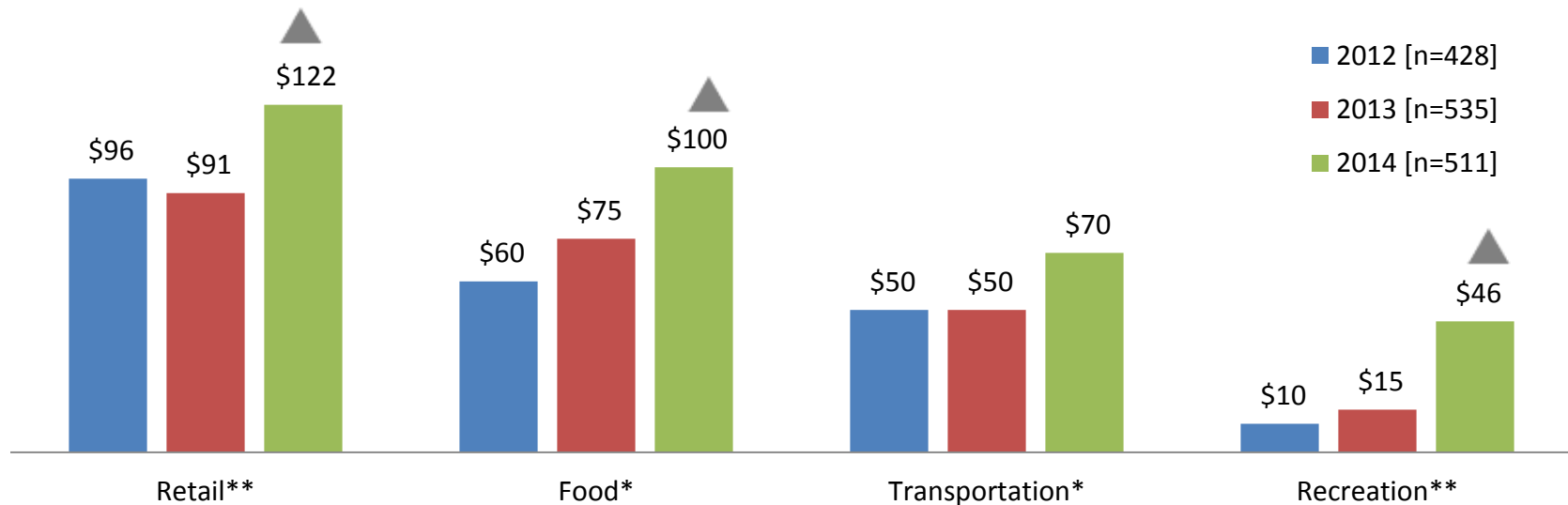
*Median Expenditures

**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.

▲ ▼ notes significant difference between 2013 and 2014 at the 95% confidence level

Day visitors spent the most on retail shopping and food while visiting Maine during the 2014 Fall season.

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.

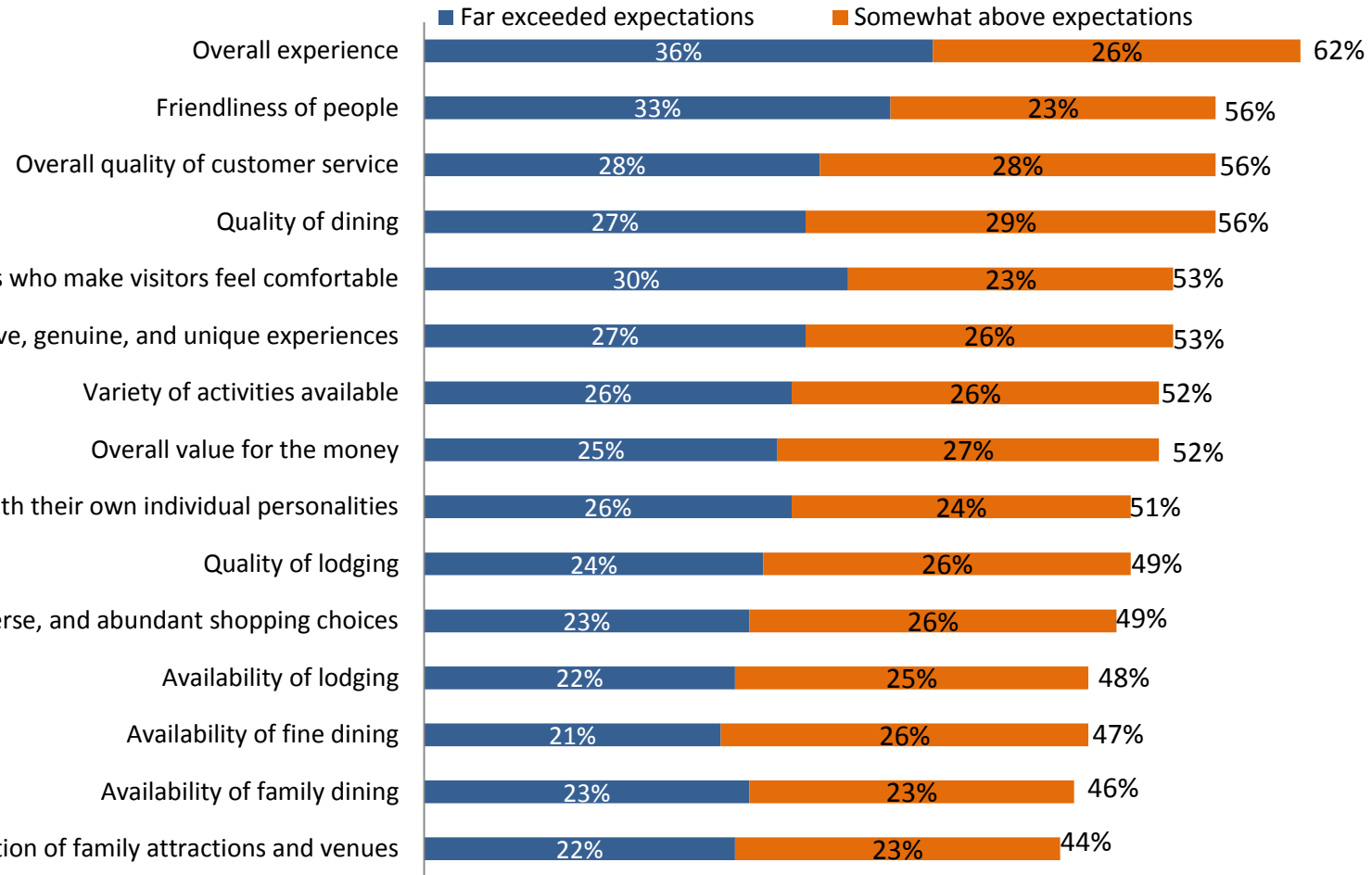
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Trip Evaluation



The overall experience of a visit to Maine and the friendly people are the items that most impressed overnight visitors.

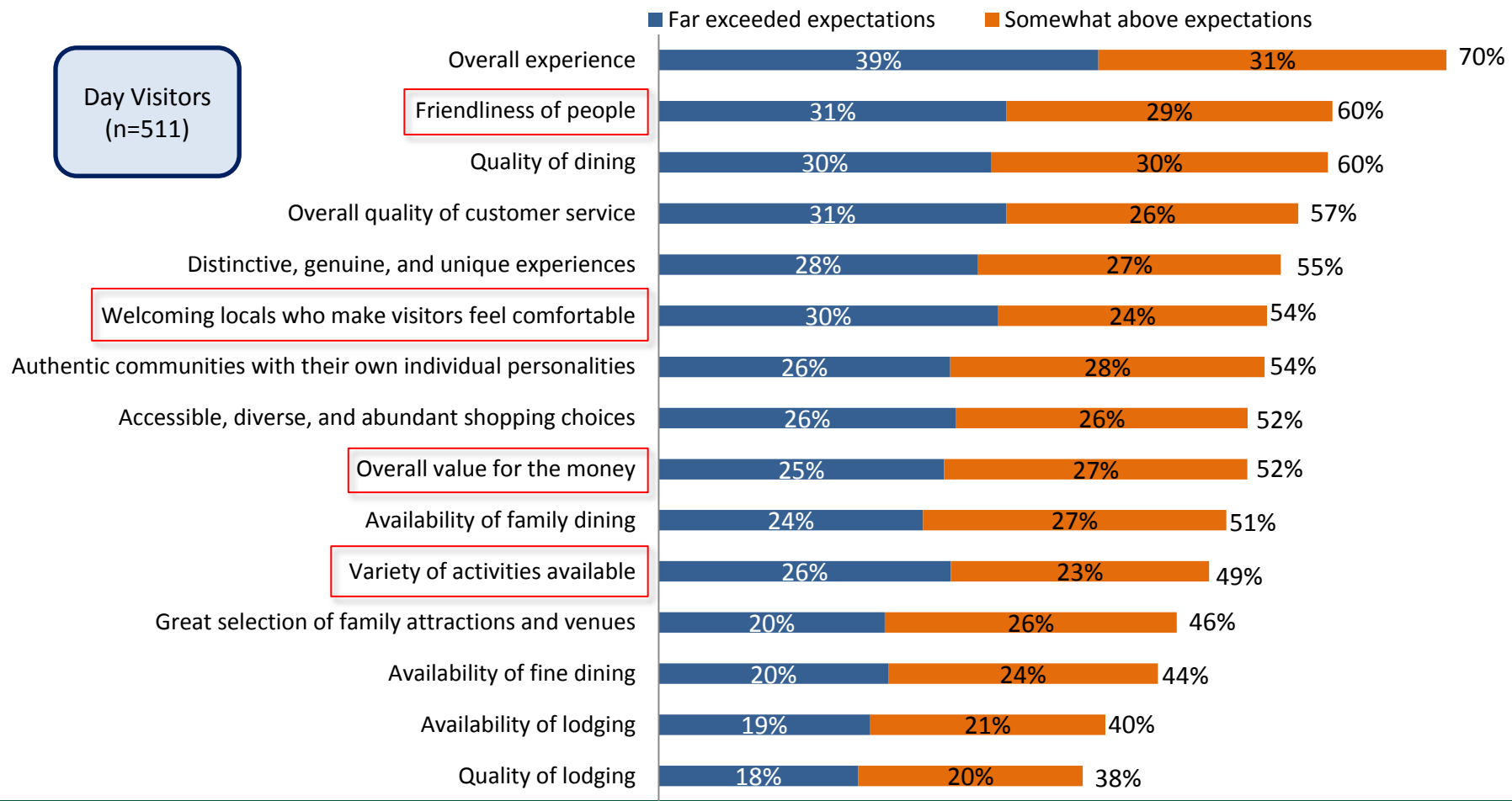
Overnight Visitors (n=715)



The overall experience of a visit to Maine and the friendly people are also the items that most impressed day visitors.

- First-time visitors are more likely to indicate that their trip in Maine exceeded their expectations for certain items (indicated with red boxes).

Day Visitors
(n=511)

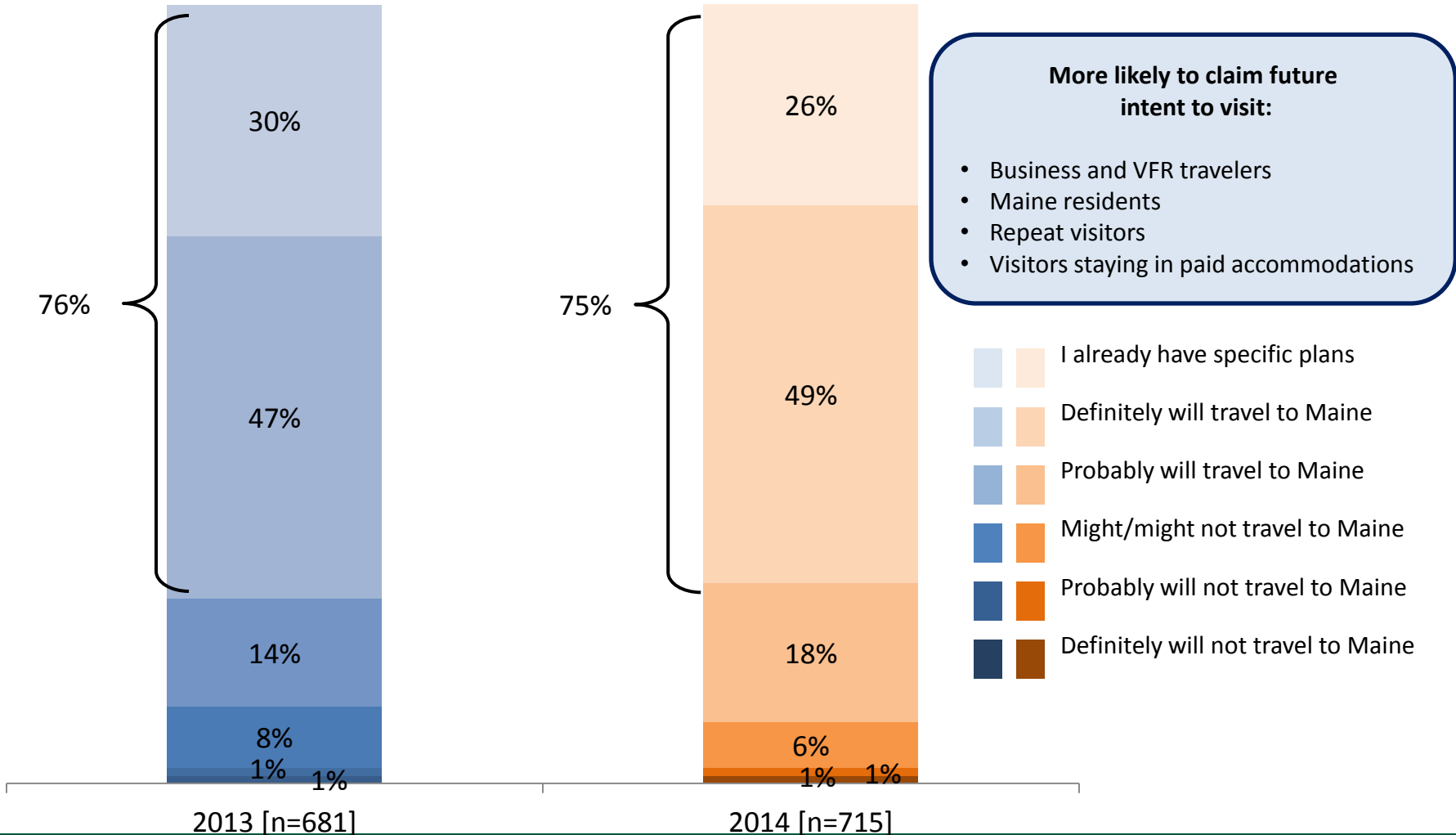


Future Travel



Three-fourths of Maine's overnight Fall visitors will visit Maine again in the next two years.

Likelihood of Trip to Maine in Next Two Years

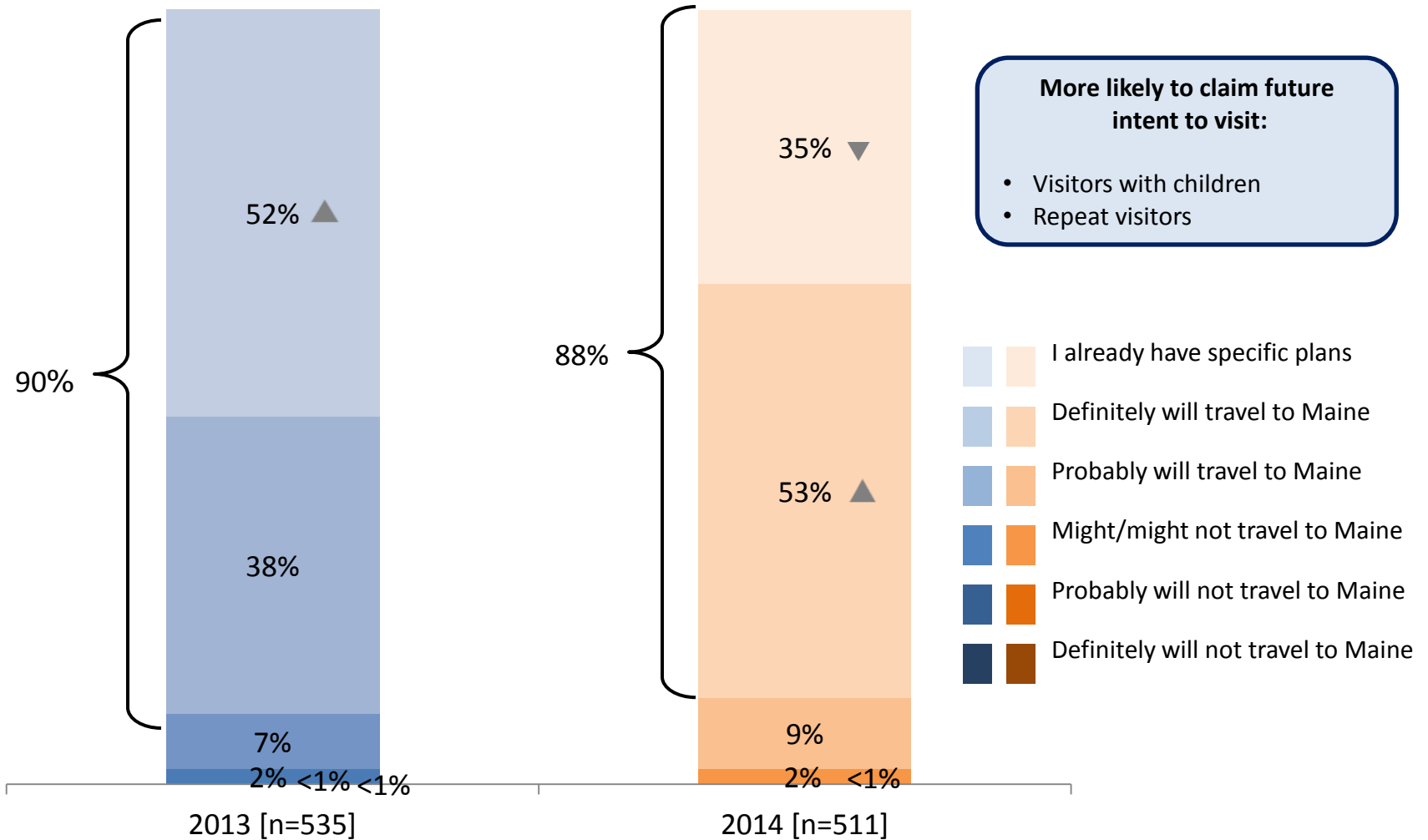


Overnight Q38. How likely will you be to travel in Maine in the next two years?

▲▼ notes significant difference between 2013 and 2014 at the 95% confidence level

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

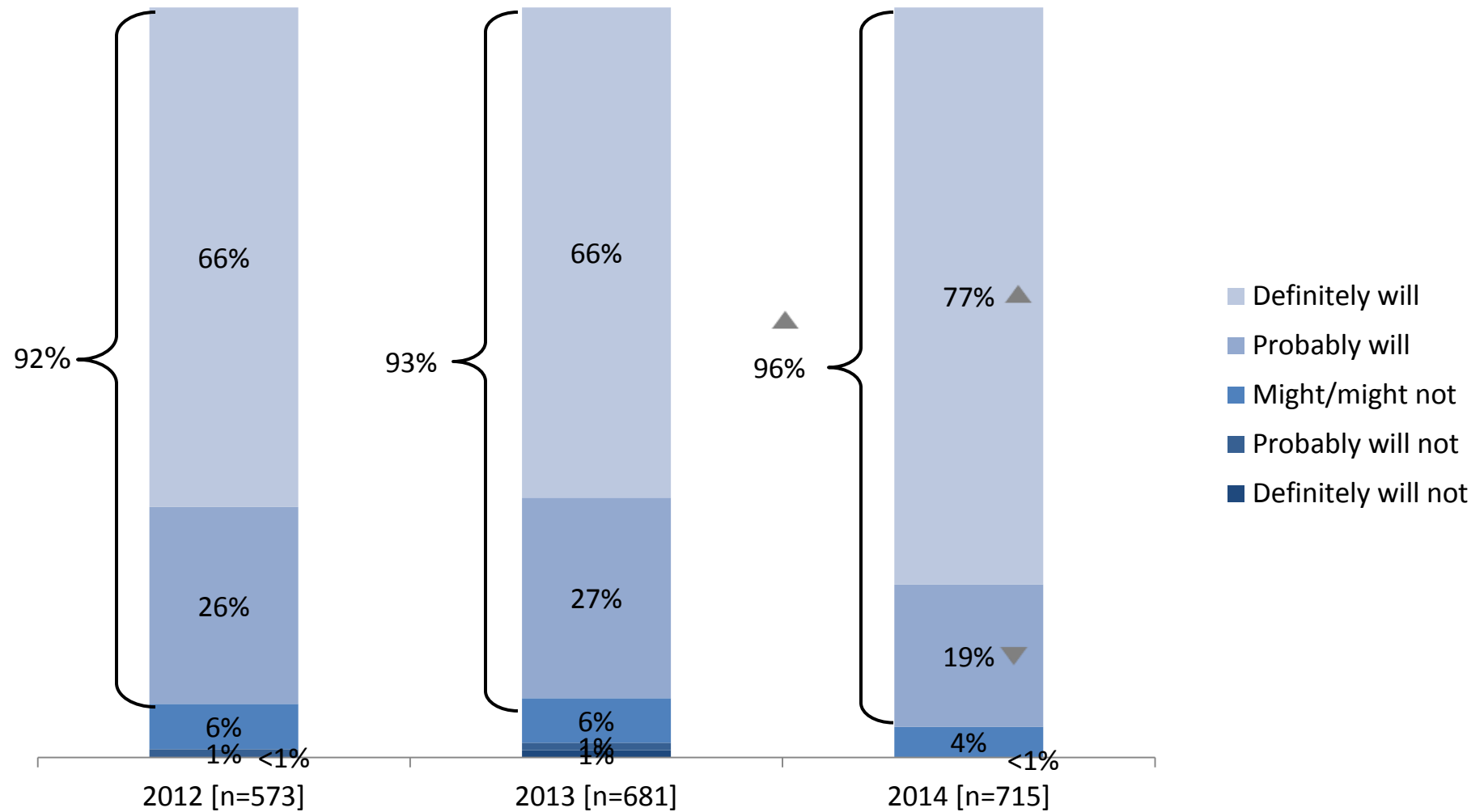
Likelihood of Trip to Maine in Next Two Years



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

▲▼ notes significant difference between 2013 and 2014 at the 95% confidence level

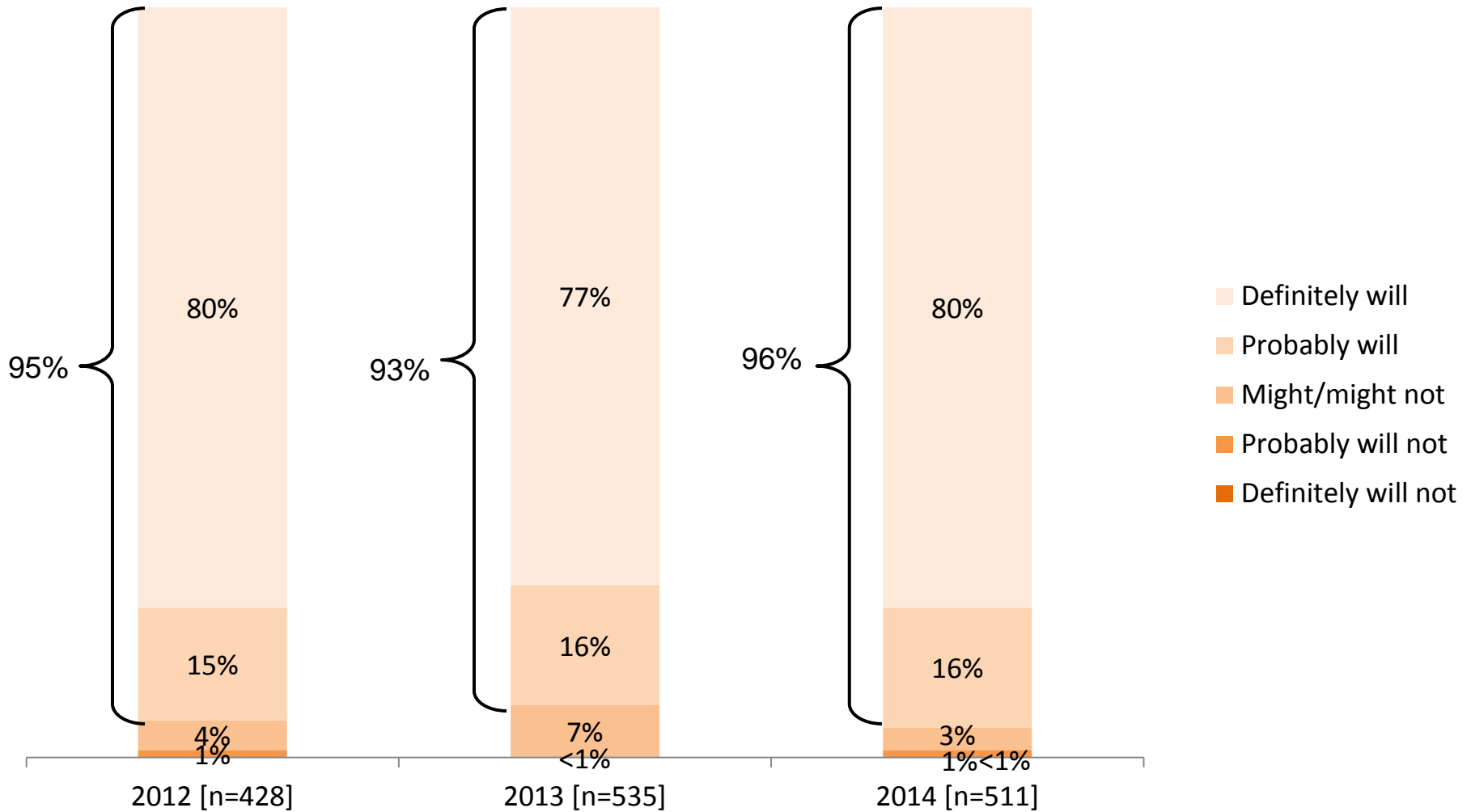
Overnight visitors' excitement with their vacation in Maine is echoed in their intent to recommend Maine as a vacation destination.



Overnight Q39: 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

Day visitors view their visit to Maine similarly, with 96% indicating that they're likely 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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