

Maine Office of Tourism Visitor Tracking Research

Winter 2015 Seasonal Topline

Prepared by



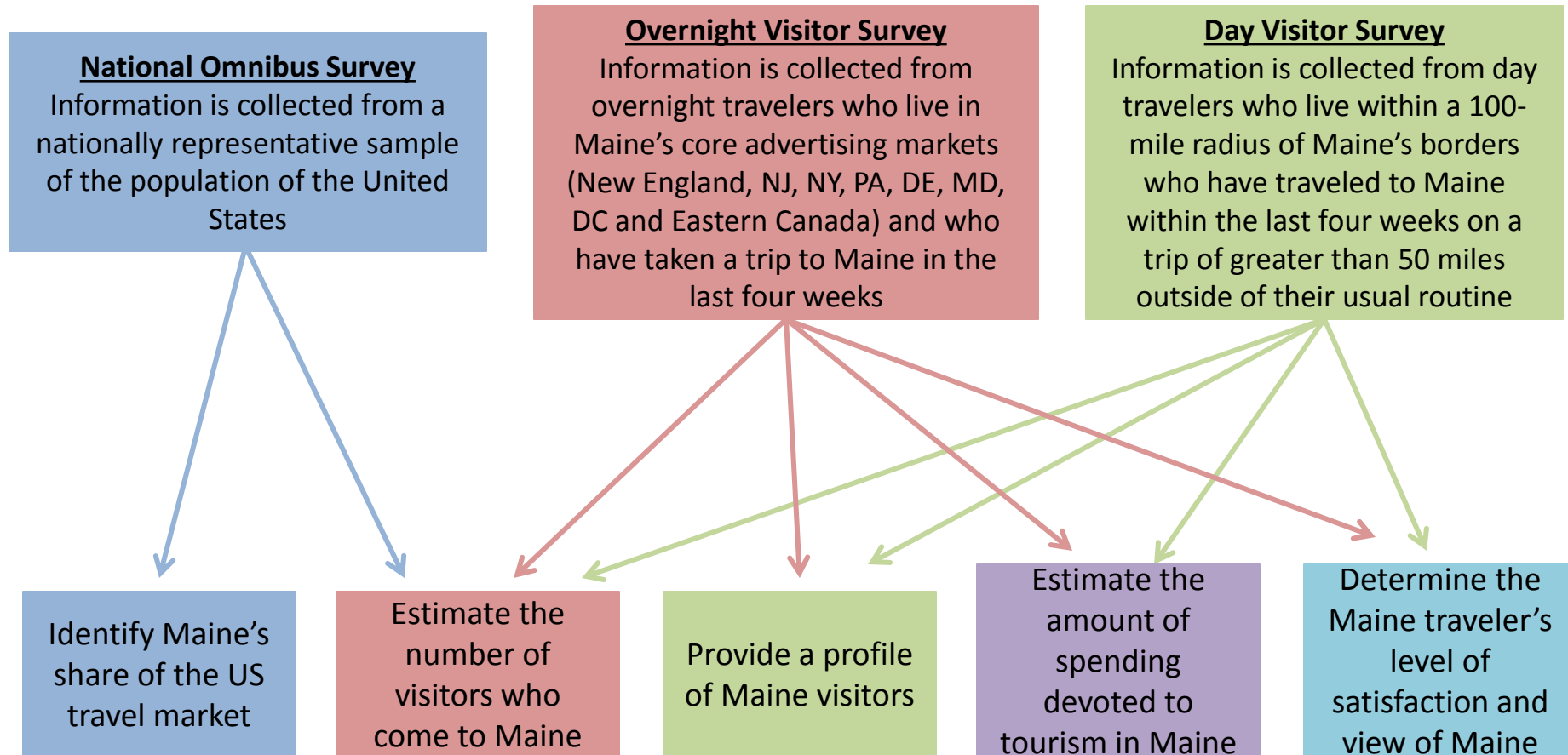
June 2015

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 December 2014 through April 2015. At the conclusion of the 2015 travel reporting season (December 2015), adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

- Nationwide overnight leisure travel from December 2014 to April 2015 showed an increase over the prior winter season after remaining stable for the past few winters. Despite the unusually cold temperatures felt this past winter, Maine also experienced an uptick in tourism-related overnight visitation to the State, continuing a growth pattern that has historically been at least as strong as the rest of the nation.
- Overall tourism-related visitation to Maine (overnight and day) increased 2% from Winter 2014 to Winter 2015, continuing several years of year-over-year growth in visitation.

Executive Summary

- The proportion of overnight visitors from Canada during Winter 2015 was on par with the level observed the prior year. Looking at the visitor origin patterns over the past several winter seasons, Maine saw a significantly higher incidence of overnight visitors from Canada during Winter 2013 – likely tied to the favorable exchange rate for Canadians at that time. It appears that Canadian visitation is returning to levels seen in Winter 2012 as the exchange rate is now less favorable for Canadians.
- Though well known for its summer beach opportunities, the Maine Beaches region continued to attract the greatest proportion of both overnight and day visitors to Maine during the Winter 2015 season. The various shopping and culinary opportunities in this region are the likely draw during the winter months, as the highest proportions of visitors listed “food/beverage/culinary” activities and “shopping” as interest areas they wanted to pursue on this trip.

Executive Summary

- Showing a second year-over-year increase over the prior winter, first-time visitors account for 22% of Maine's overnight visitors. First-time overnight visitation rates first exhibited growth during last winter season, with year-over-year increases continuing to be evident during the subsequent Summer and Fall seasons of 2014. After four consecutive seasons of gains, this suggests a trend that Maine is attracting a greater share of first-time visitors. Continued monitoring of these first-time visitation rates during 2015 will help determine if a true shift in the proportion of first-time visitors is occurring. Winter 2015 also showed an increase in the proportion of overnight visitors arriving from the Mid-Atlantic region, a geographic market more prevalent among the first-time visitor cohort.
- The continued successful introduction of Maine to new visitors is vital to sustained growth in tourism. First-time visitors are more likely to stay in paid accommodations while visiting and tend to stay for longer periods of time, making this group of visitors even more economically desirable at the outset. In addition, Maine continues to have a high rate of repeat visitation, suggesting that these first-time visitors will continue to visit the State in the coming years. Four in five overnight visitors and nine in ten day visitors indicate that they will visit Maine again with the next two years.

Executive Summary

- Maine continues to receive extremely favorable evaluations from its visitors, and the general categories receiving the highest ratings continue to center on visitors' overall experience and the service and friendliness of the Maine people.
 - Two-thirds of Winter overnight visitors stated that their vacation exceeded their expectations for *friendliness of the people*, and nearly two-thirds responded similarly regarding *overall quality of customer service* and *welcoming locals who make visitors feel comfortable*.
 - Half of day visitors felt similarly about the *friendliness of the people*, and just under half felt this way regarding *welcoming locals who make visitors feel comfortable*.
 - Though a lesser proportion of day visitors report that Maine exceeded their expectations on a number of items than do overnight visitors, this is likely due to the fact that day visitors are presumably more familiar with Maine and its offerings due to their proximity to the State, and therefore have expectations that are more in line with what Maine has to offer.

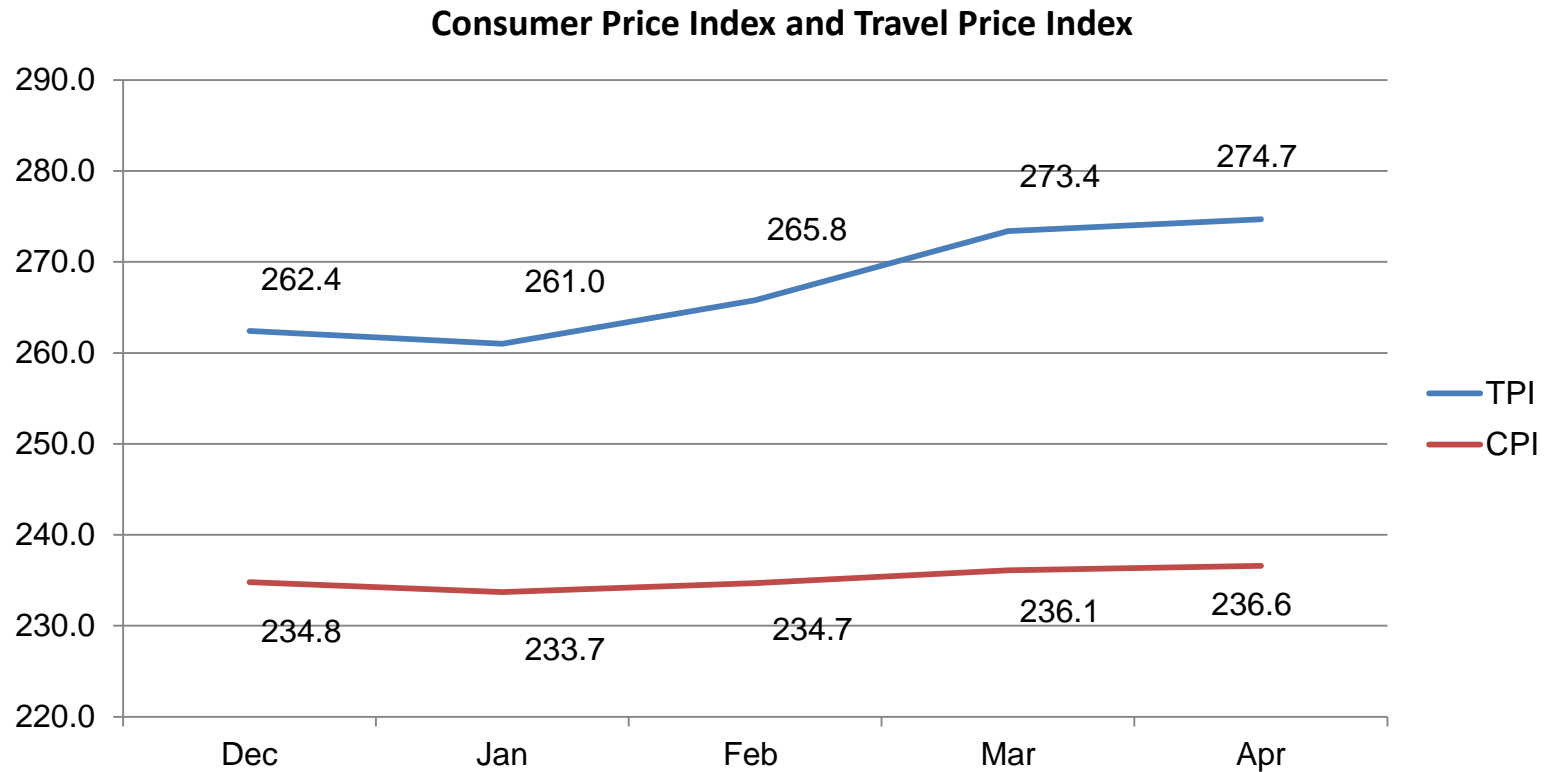
Executive Summary

- A significant outcome of travelers coming to Maine is that they intend to come back and also to tell their friends and family about Maine. Three in ten overnight winter visitors *already have plans to visit Maine* again in the next two years, and half say that they *definitely will travel* to Maine. Future travel intent is even stronger among day visitors, with four in ten *already having specific plans to travel* in Maine, and half saying they *definitely will travel* in Maine. Further, three-fourths of Maine's overnight and day visitors say that they *definitely will recommend Maine* as a vacation destination to friends or relatives.

2015 Winter Season Travel Context



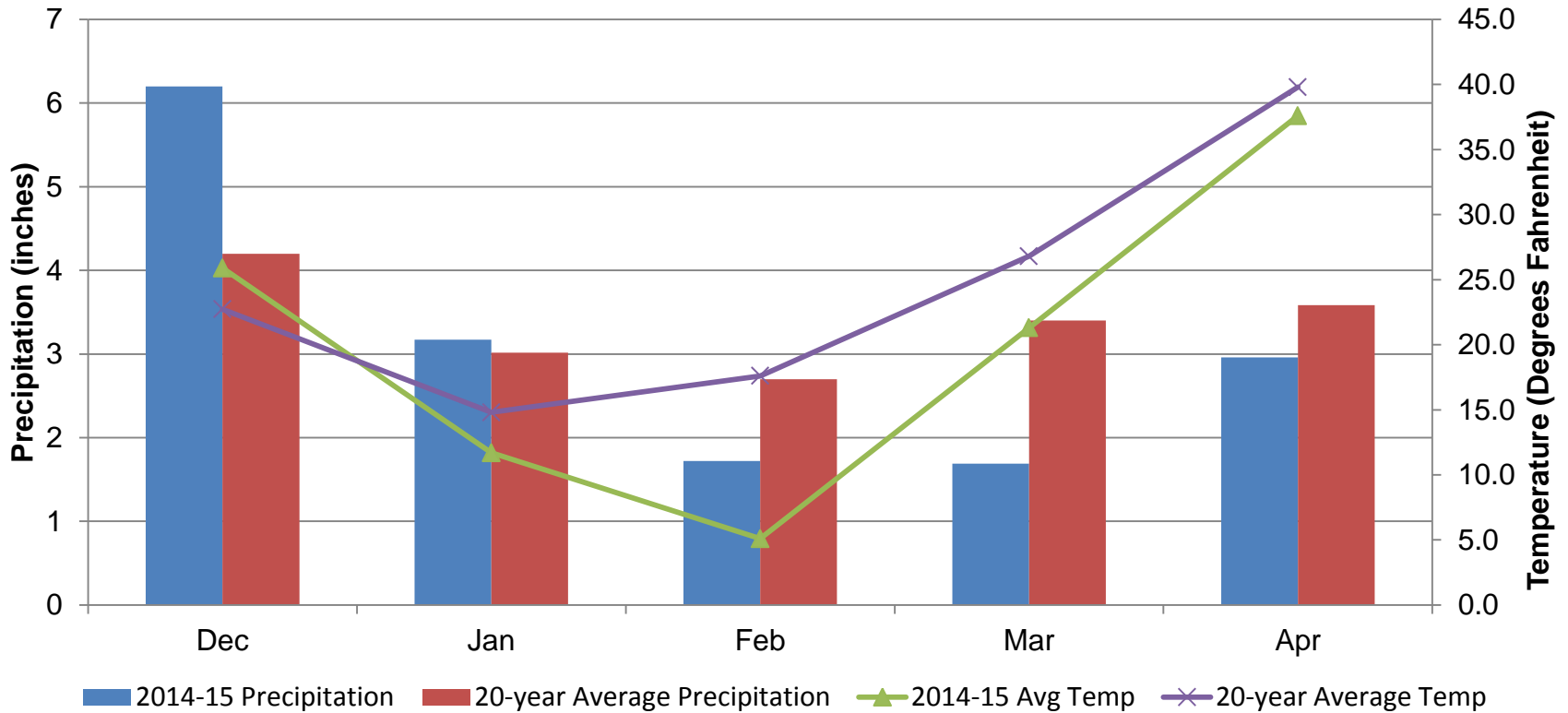
Travel Price Index continues to grow at a faster rate than the Consumer Price Index, resulting in a continued high cost of travel.



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

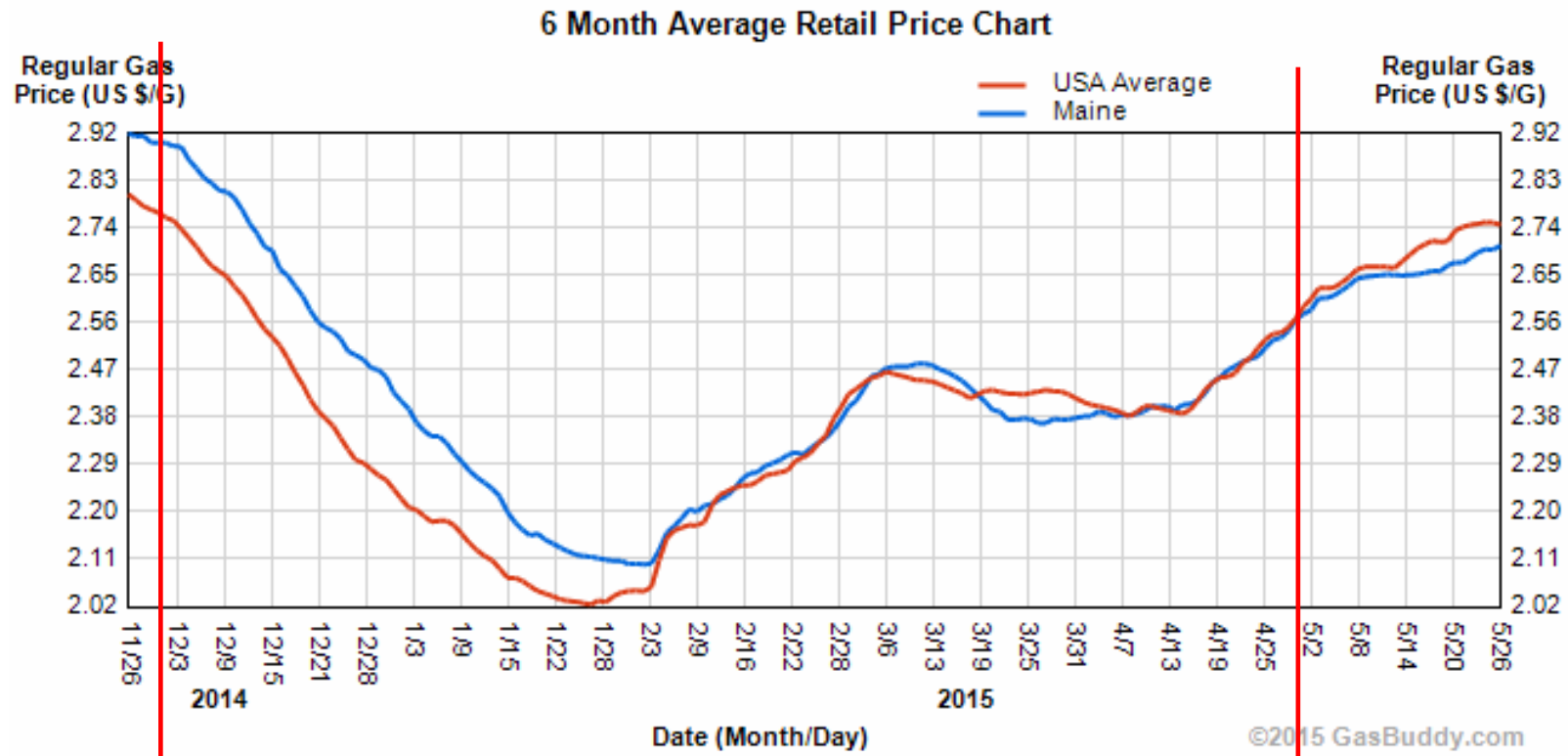
Maine precipitation was below average for the later part of the winter season, and temperatures were lower than historical average.

Precipitation and Temperature – Maine Winter 2014-2015

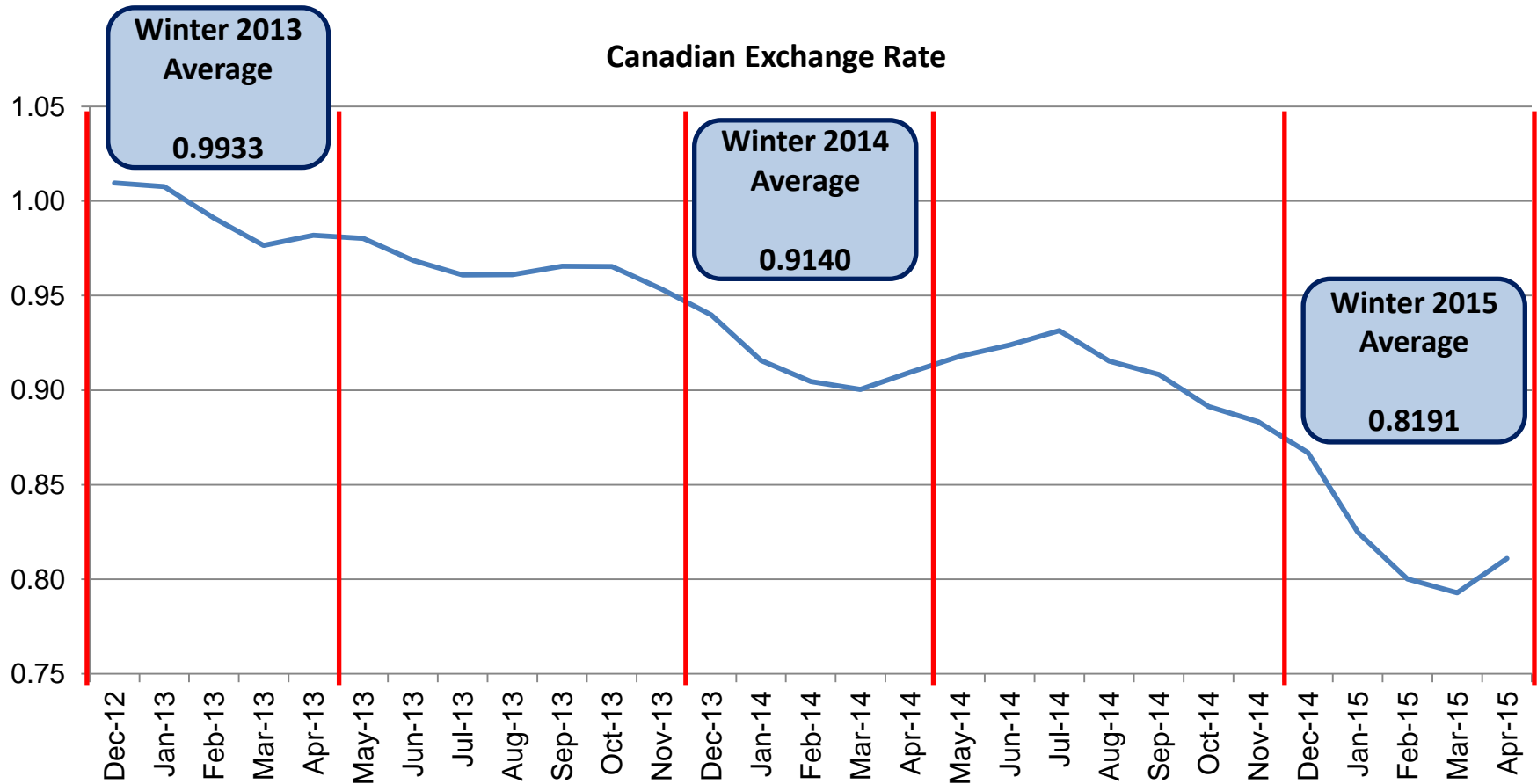


Maine gas prices surpass US average prices during the first part of the Winter season, then remain on par with the US average.

- The average price of gasoline in Maine during the winter of 2015 declined during the first part of the Winter season, though remained above the US average. February, however, saw the beginning of an increase in the average price of gasoline both in Maine and nationwide.

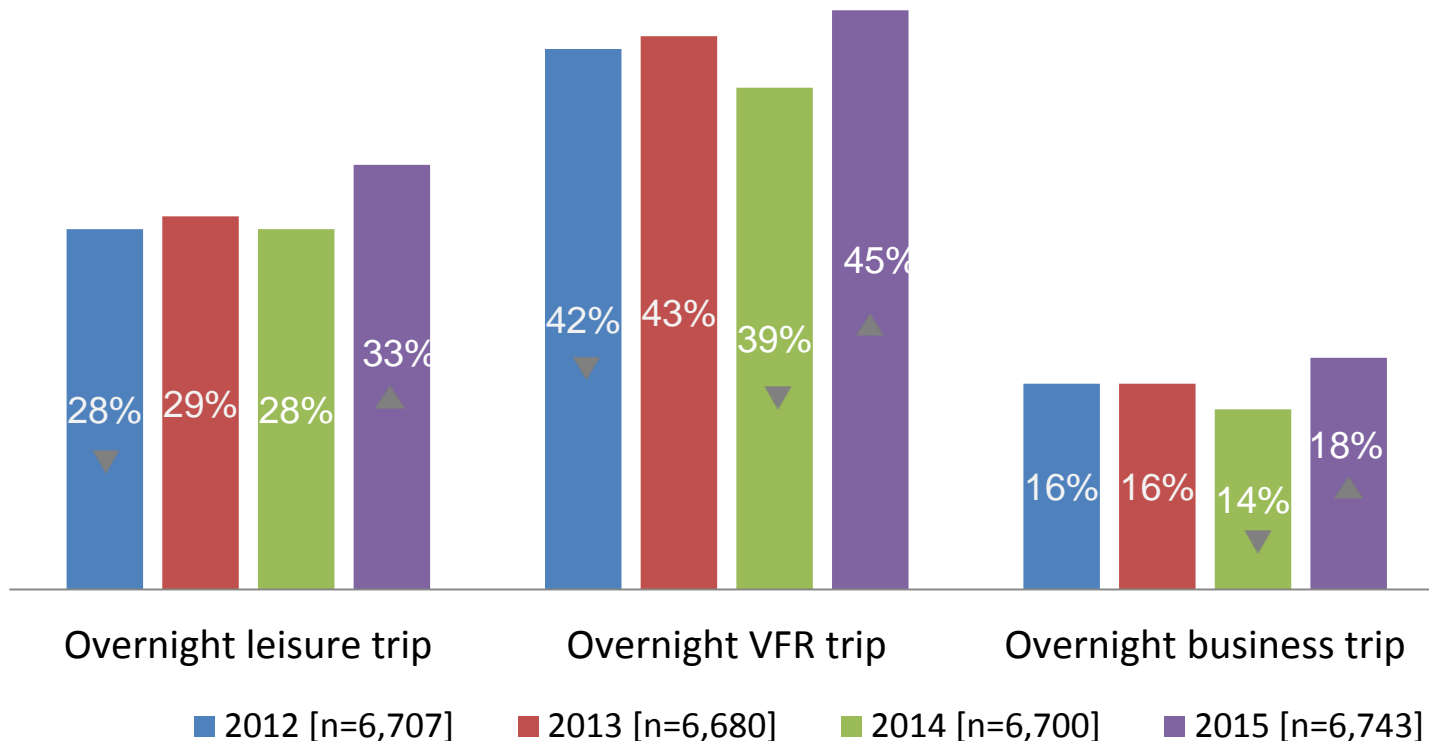


The Canadian exchange rate continued its decline, dropping to an unfavorable Winter 2015 average season rate of 0.82.



After showing relative stability the past few years, travel nationwide showed an increase this winter season.

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

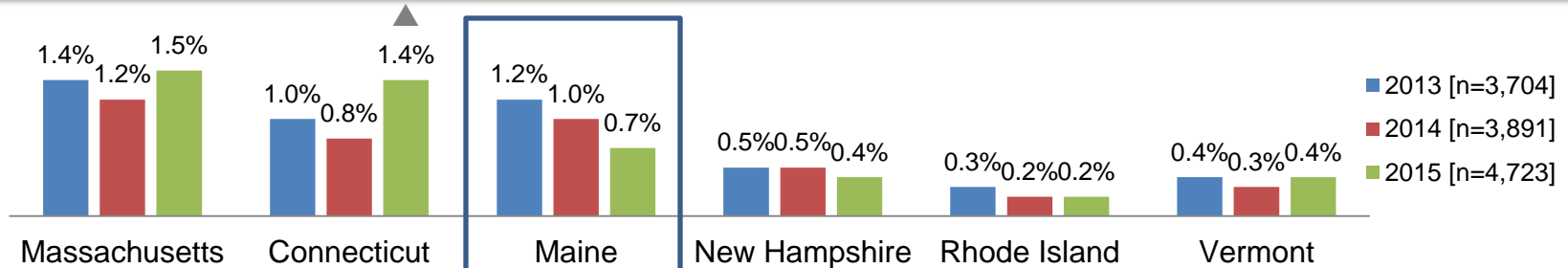


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

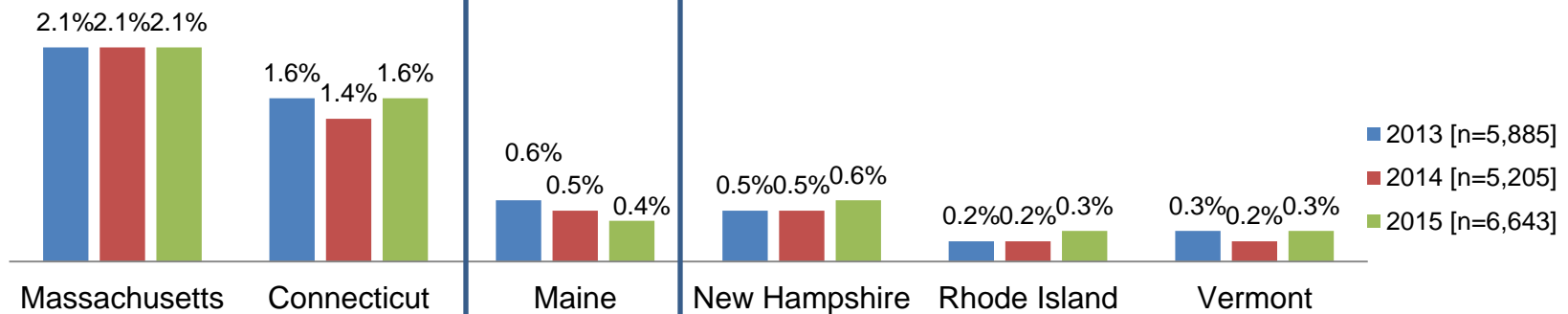
▲ ▼ notes significant difference from the prior year at the 95% confidence level

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

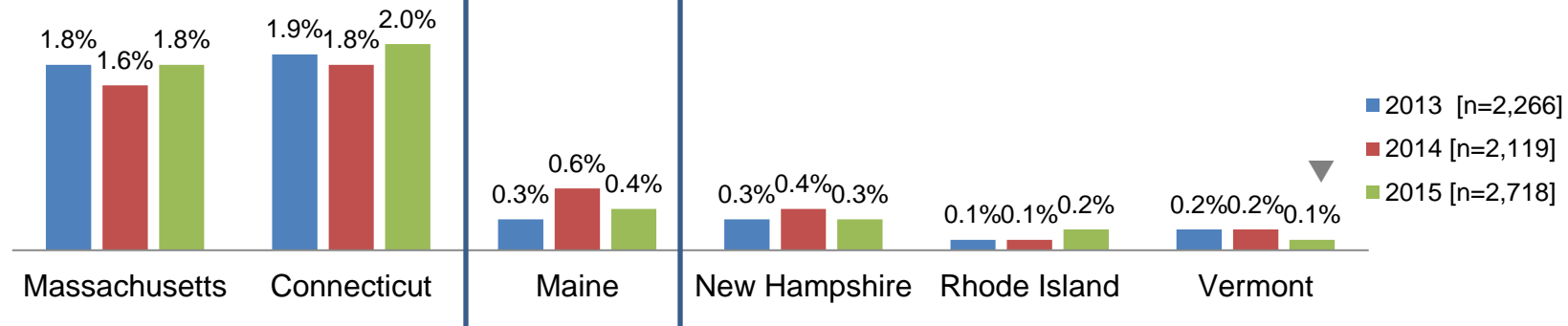
Overnight Leisure Trips



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 from the prior year at the 95% confidence level

2015 Winter Season Highlights



Estimated visitation to Maine during the winter season increased 2% over the prior year.

- While overnight visitation is up nearly 4%, day visitation estimates are relatively flat year-over-year for the winter season.

Note: Visitation estimates provided here are preliminary and reflect visitation from December 2014 through April 2015. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

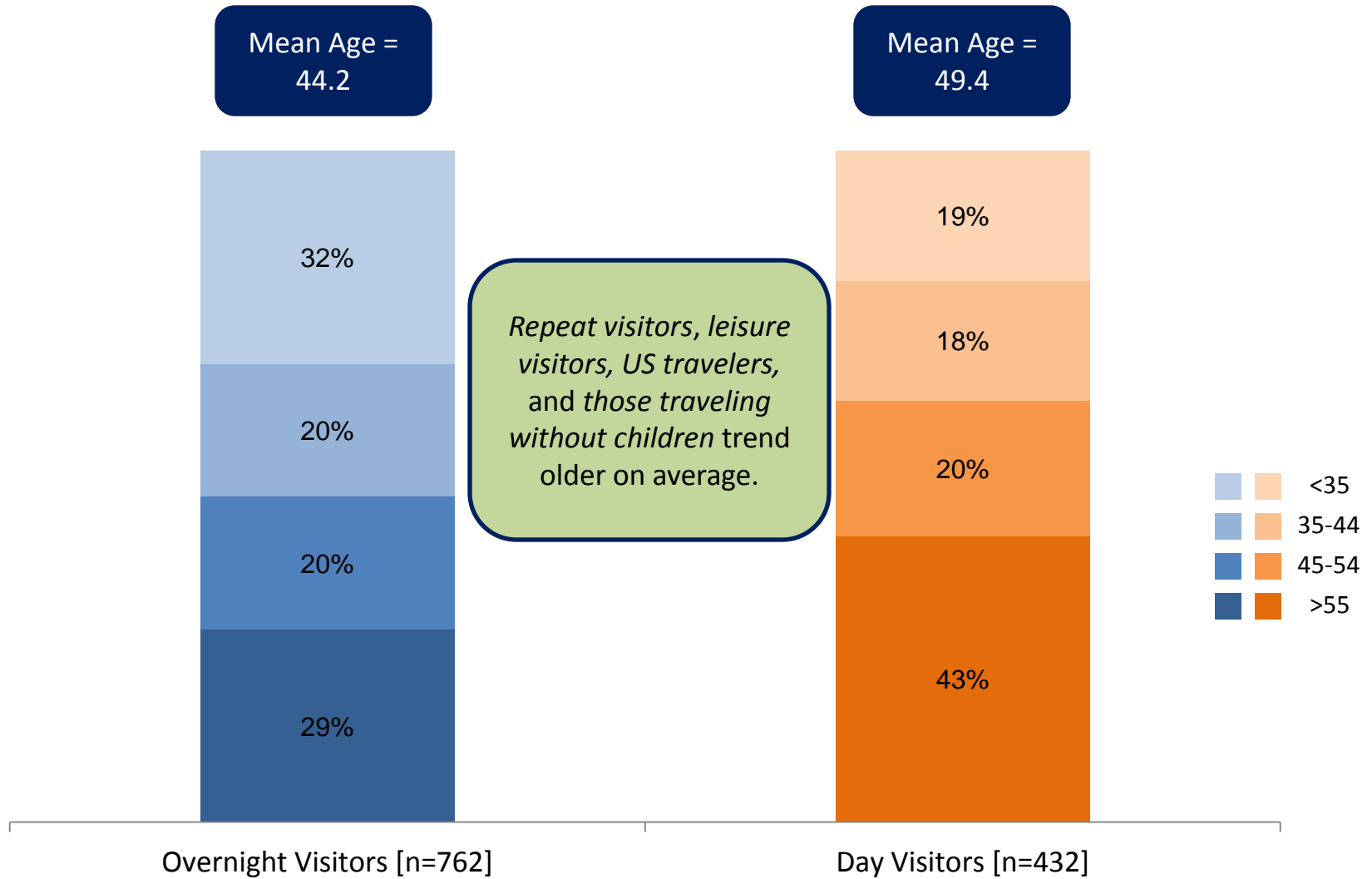
Visitation Estimates*	Winter 2014	Winter 2015	% Chg
Total Estimated Visitation	5,449,568	5,565,576	+2.1%
<i>Overnight Visitors</i>	<i>2,865,130</i>	<i>2,977,542</i>	<i>+3.9%</i>
<i>Day Visitors</i>	<i>2,584,438</i>	<i>2,588,034</i>	<i>+0.1%</i>

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

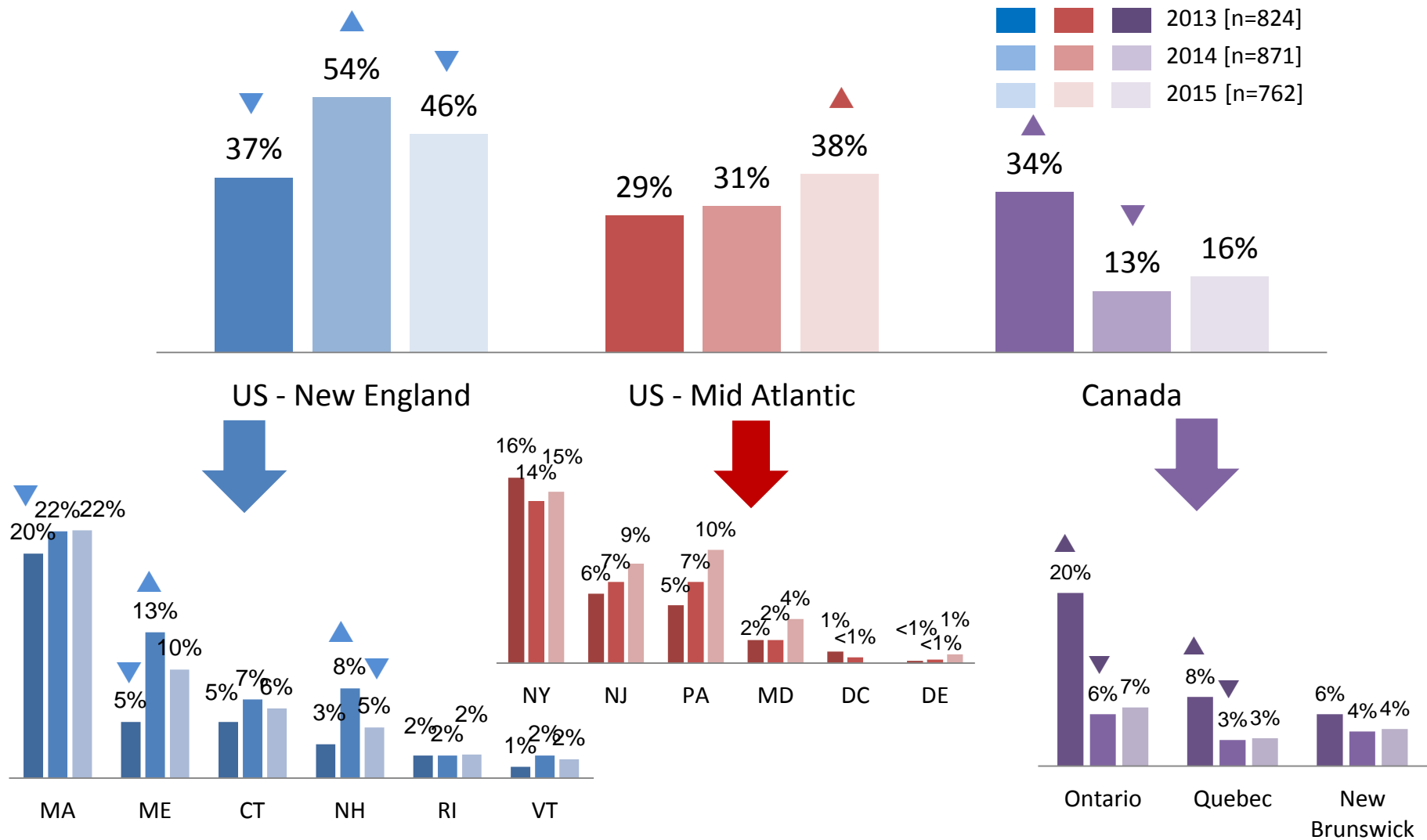
Tourism related trips include:

- 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.*

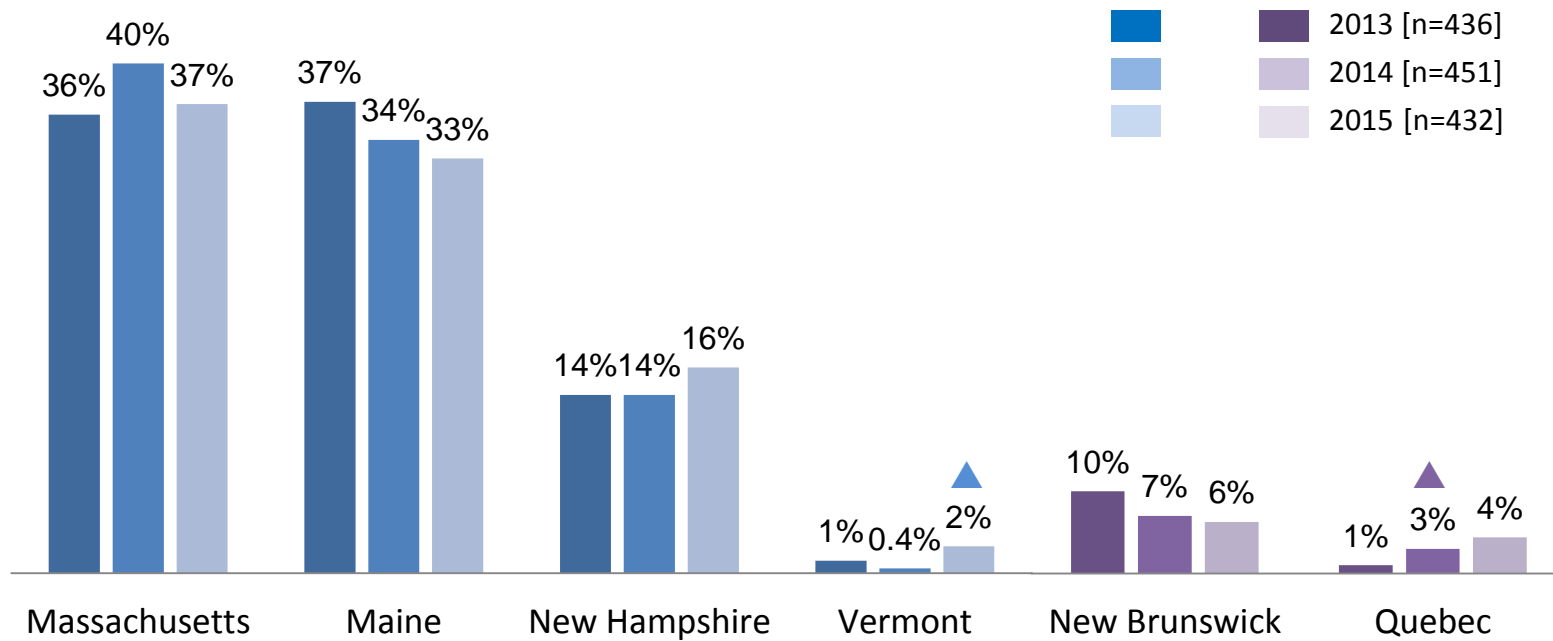
Average age of Maine winter visitors is middle to late 40s, with differences between overnight and day visitors.



The proportion of overnight visitors arriving from Canada this winter is consistent with the prior winter season.



Maine continues to draw the greatest proportions of winter day visitors from in-state and Massachusetts.

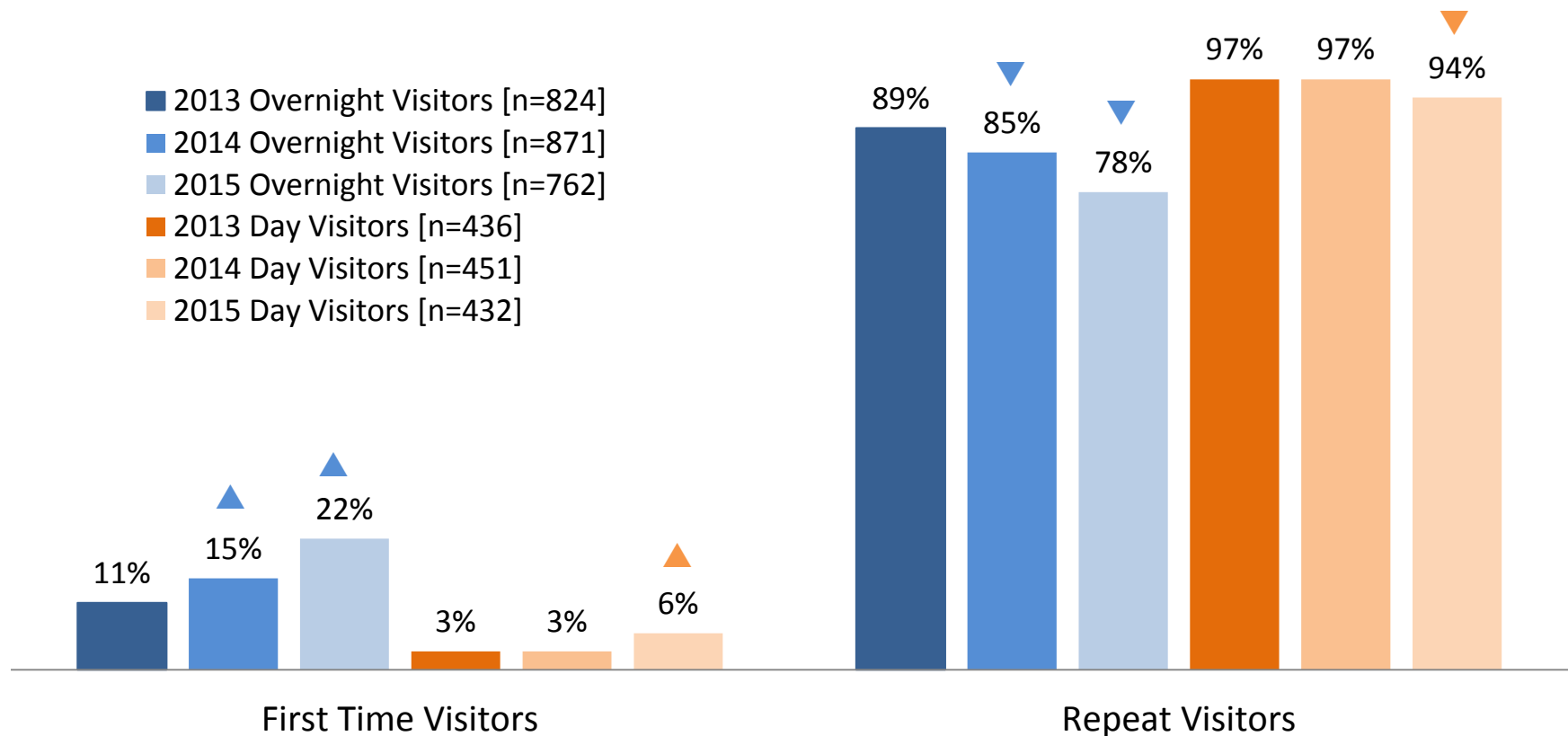


State/Province of Residence

▲▼ notes significant difference from the prior year at the 95% confidence level

The 2015 winter season saw an increase in the proportion of first-time overnight and day visitors.

- This was the second consecutive winter season with an increase in overnight first-time visitation to Maine.
- Overnight visitors arriving from outside of New England, as well as those under the age of 45, are more likely to be visiting Maine for the first time.

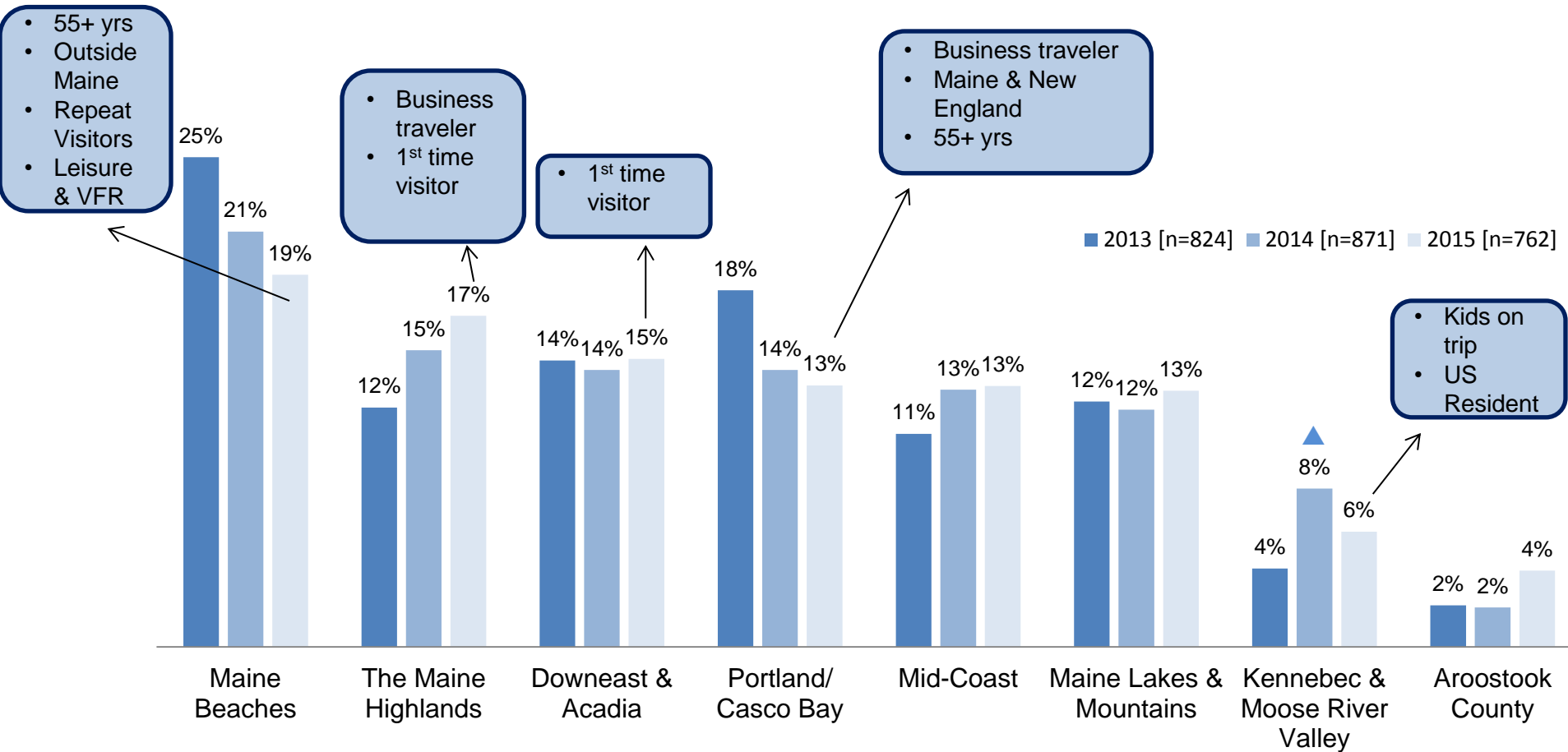


Overnight Q11, Day Q10. Was this your first visit to Maine?

▲▼ notes significant difference from the prior year at the 95% confidence level

Winter overnight visitation is spread out across several regions, with the greatest proportions traveling to the Beaches and Highlands regions.

- 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 from the prior year at the 95% confidence level

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

- The sub-groups of day visitors that are more likely to visit some of Maine's tourism regions are illustrated in the chart below.

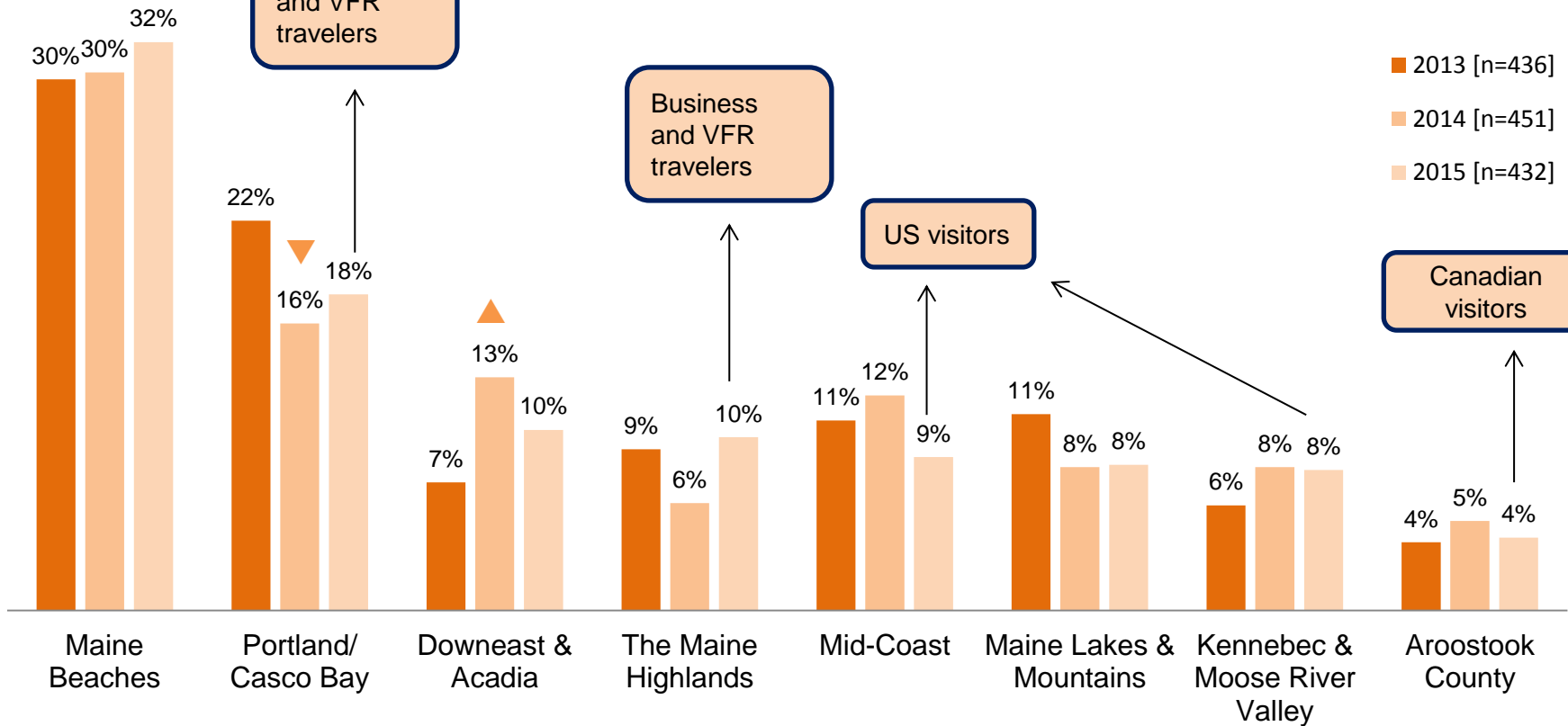
Leisure travelers
Outside of Maine

Business and VFR travelers

Business and VFR travelers

US visitors

Canadian visitors

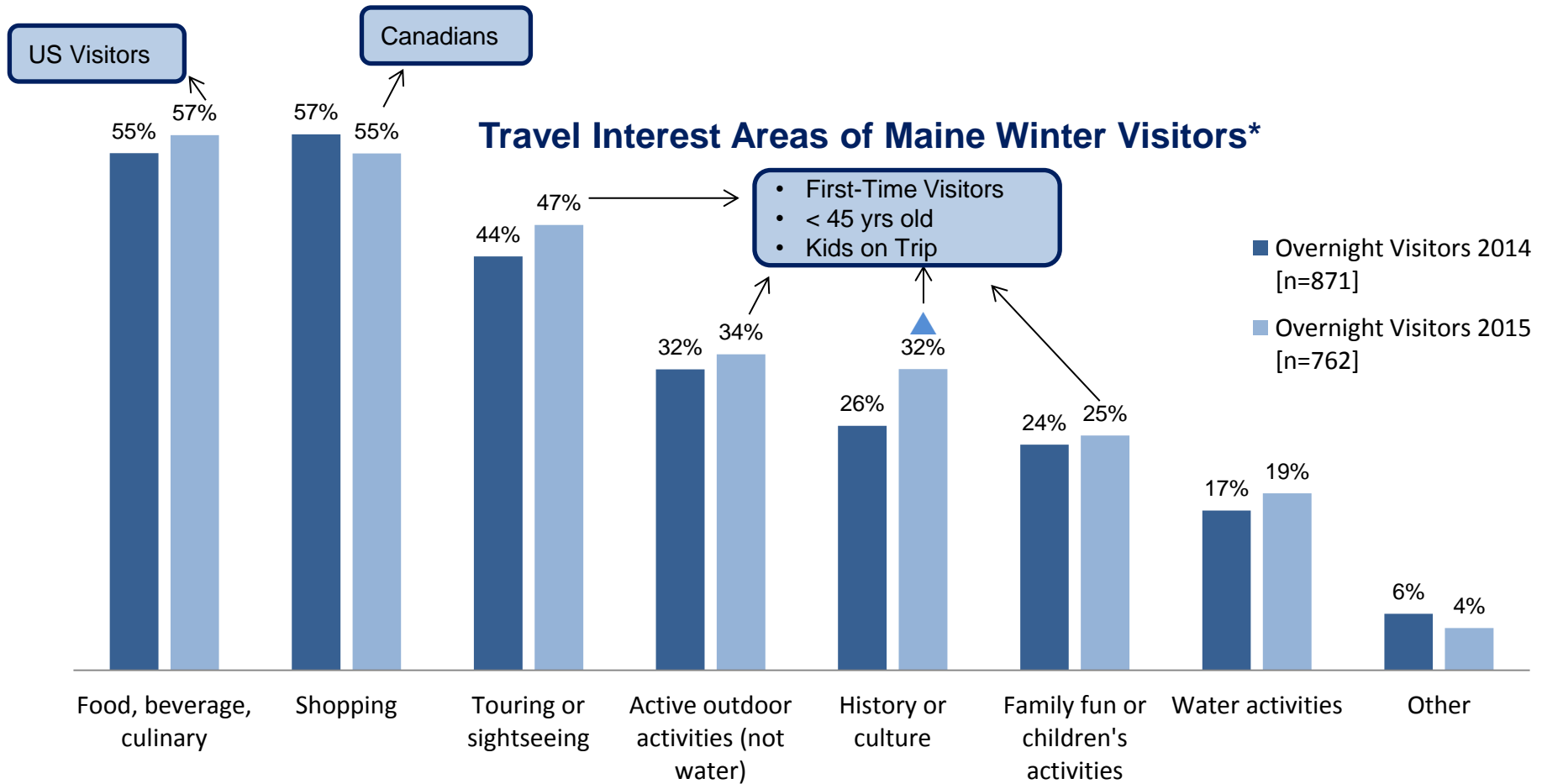


Day Q20. What region in Maine was your primary destination?

▲ ▼ notes significant difference from the prior year at the 95% confidence level

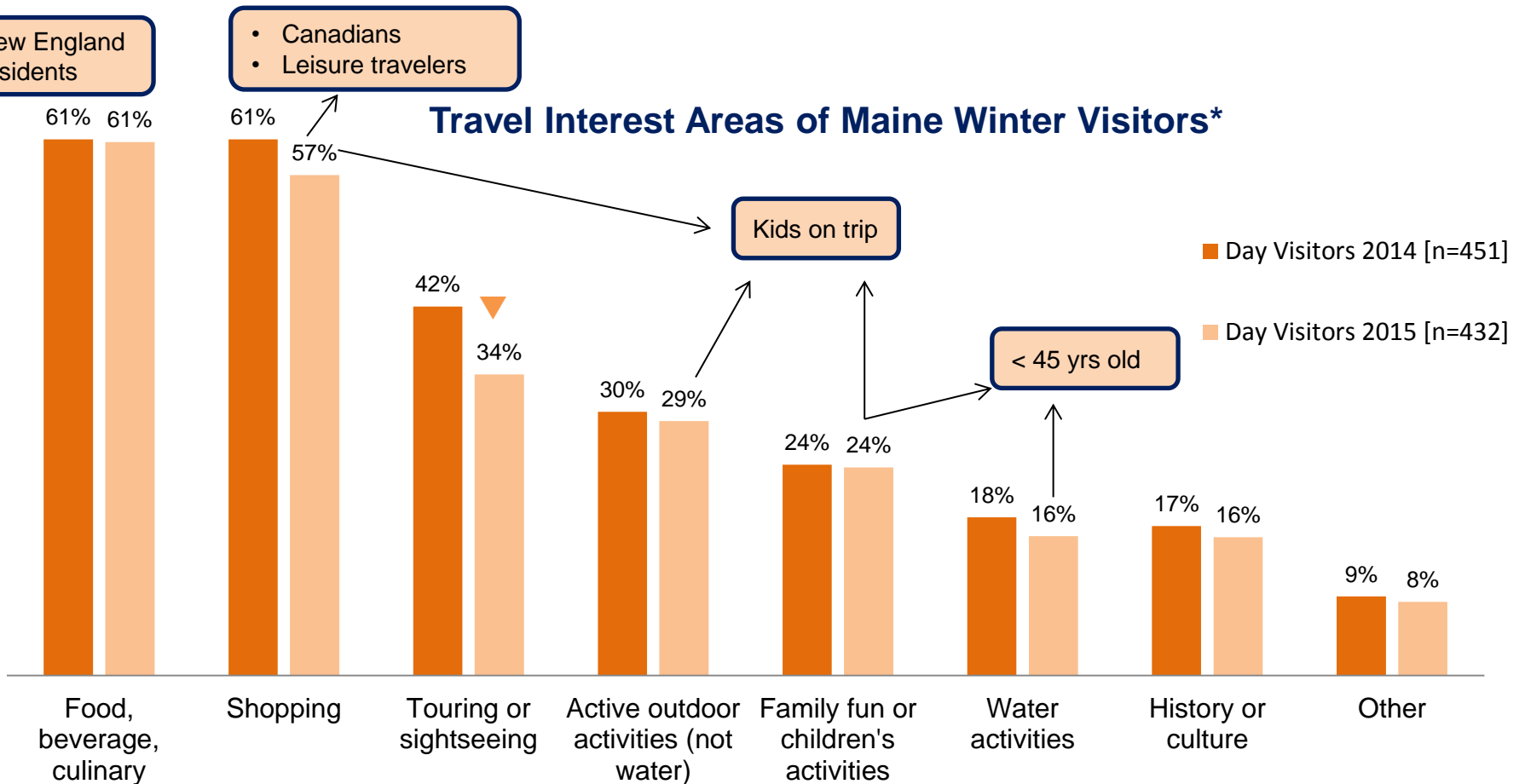
Most winter visitors to Maine were interested in exploring the various *food/beverage/culinary* options or *shopping* while visiting.

- As compared to the prior winter season, there was an increase in the proportion of overnight visitors listing *history or culture* as an interest area they wanted to pursue during this trip to Maine.



Similar to overnight visitors, day visitors were mostly interested in food/beverage/culinary activities and shopping while visiting Maine.

- This winter season had fewer day visitors interested in *touring or sightseeing* activities than the prior winter season.



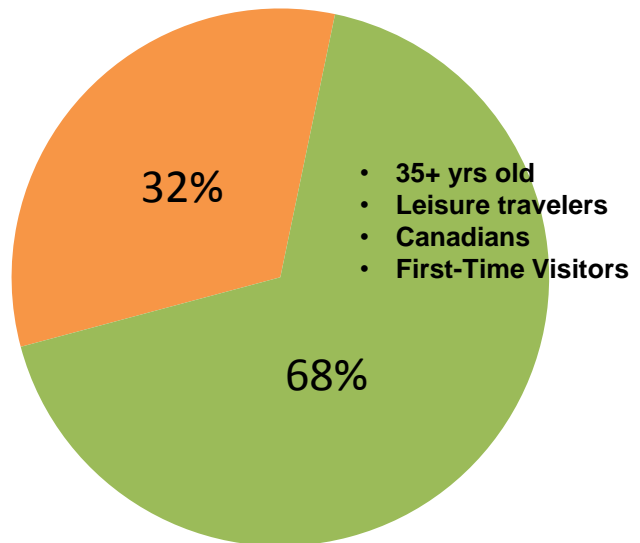
Day Q17: Which of the following interest areas did you want to pursue during this trip to Maine?

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

Two-thirds of overnight winter visitors are lodging in paid accommodations, with most staying at hotels/motels/resorts.

- The average length of stay in Maine is longer among visitors from outside New England (4.4 nights), first-time visitors (4.2 nights), travelers under the age of 45 (3.7 nights) and those traveling with children (3.9 nights).

Type of Accommodation
[n=762]

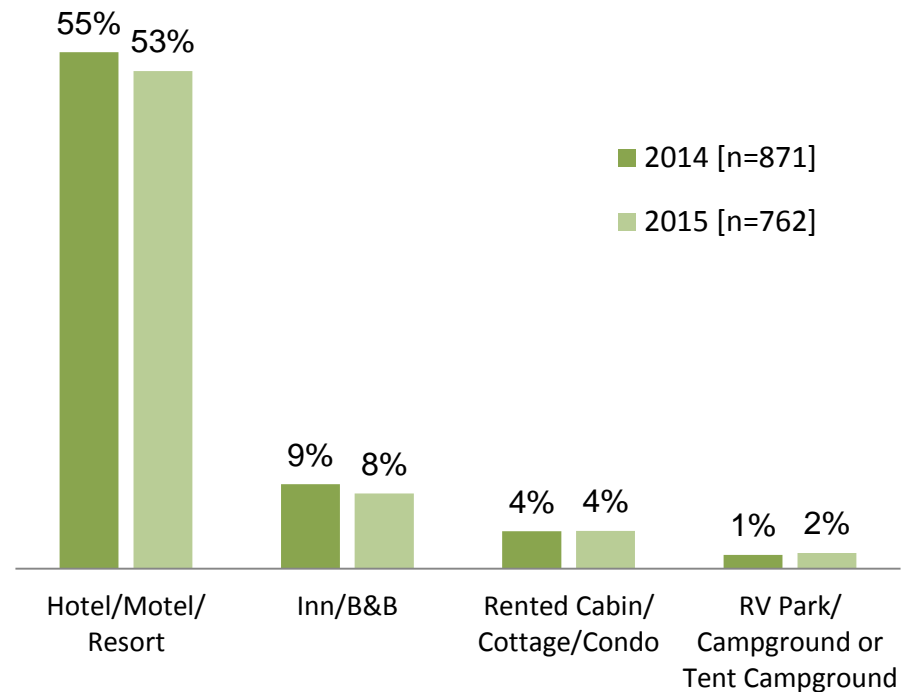


■ Unpaid Accommodations ■ Paid Accommodations

- 35+ yrs old
- Leisure travelers
- Canadians
- First-Time Visitors



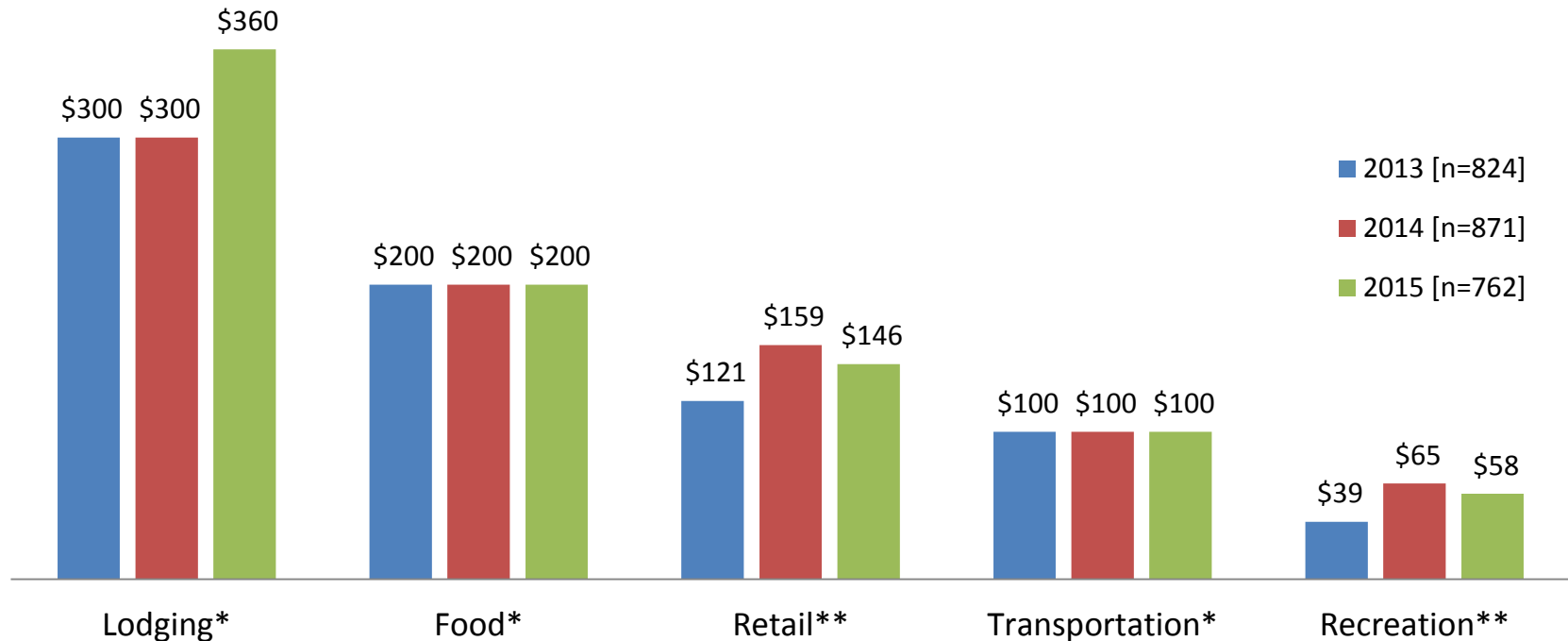
Type of Paid Accommodation



Average Length of Stay: 3.4 Nights

Lodging and food expenditures make up the greatest share of expenditures among winter overnight visitors.

Average Spending per Travel Party – Overnight Visitors



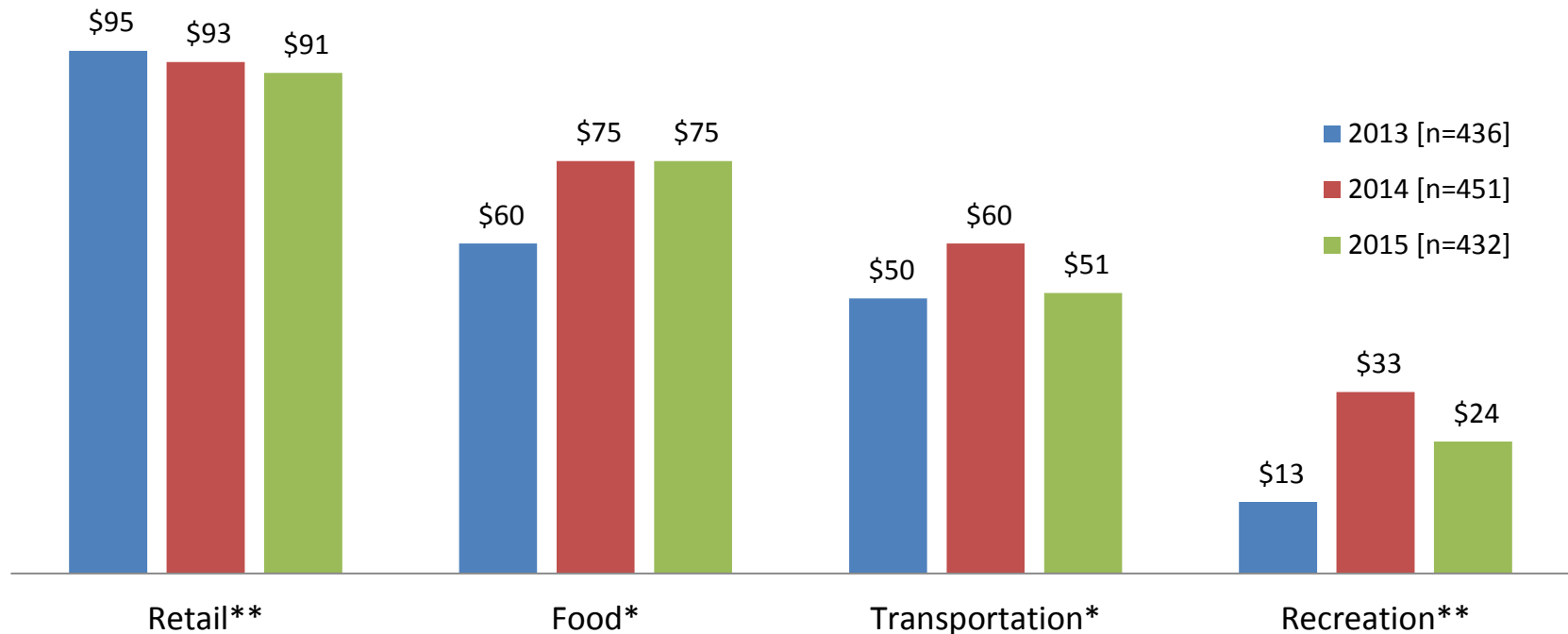
*Median Expenditures

**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 from the prior year at the 95% confidence level

Day visitors spent the most on retail goods during winter season, followed by food.

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.

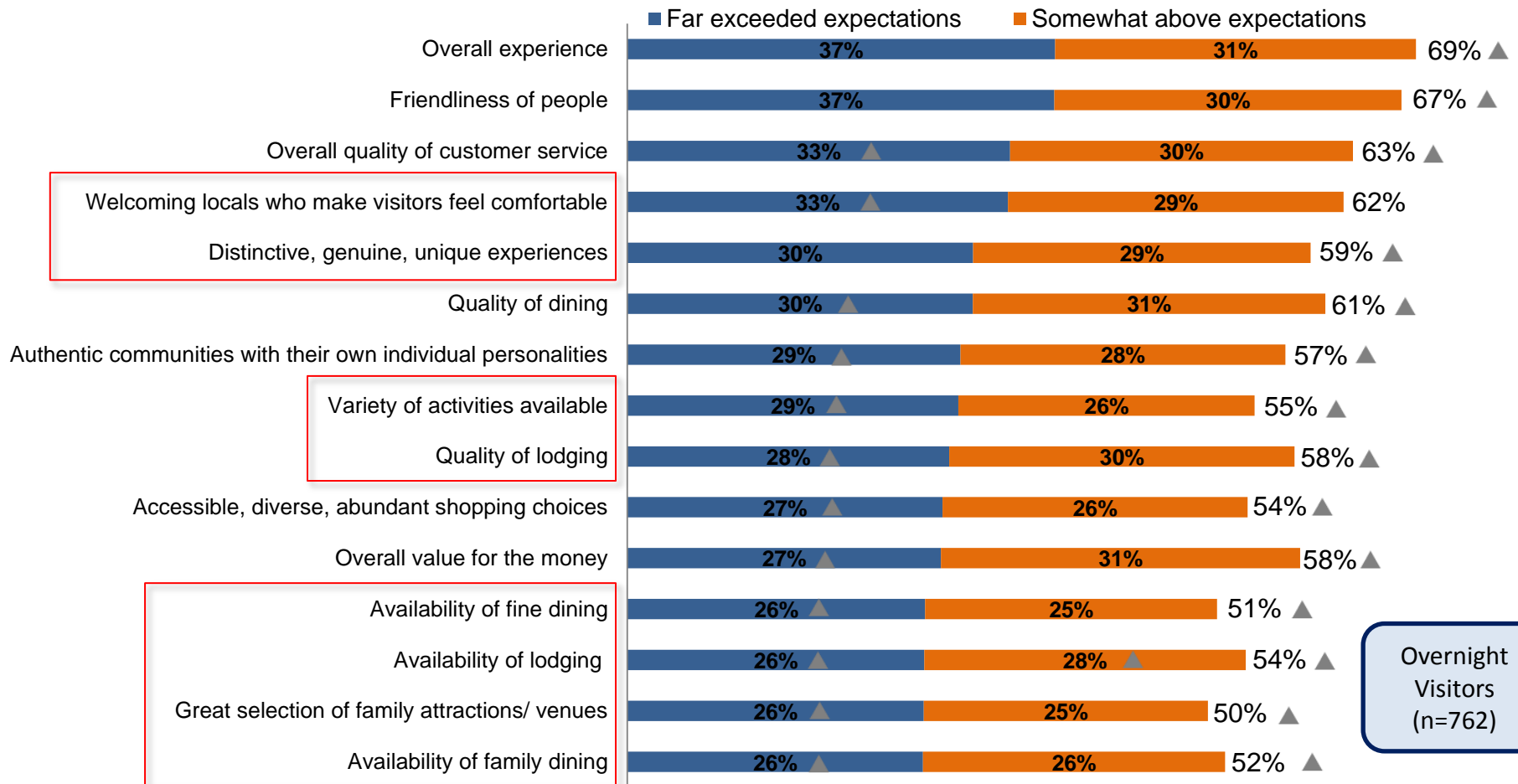
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Trip Evaluation



Two-thirds of winter overnight visitors found their *overall experience* and the *friendliness of the people* to exceed their expectations.

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



Visitor satisfaction appears significantly higher this winter (2015) than reported for the prior winter (2014).

- In all but one category, a higher proportion of winter overnight visitors this year indicated that Maine had exceeded their expectations, as compared to the prior year.

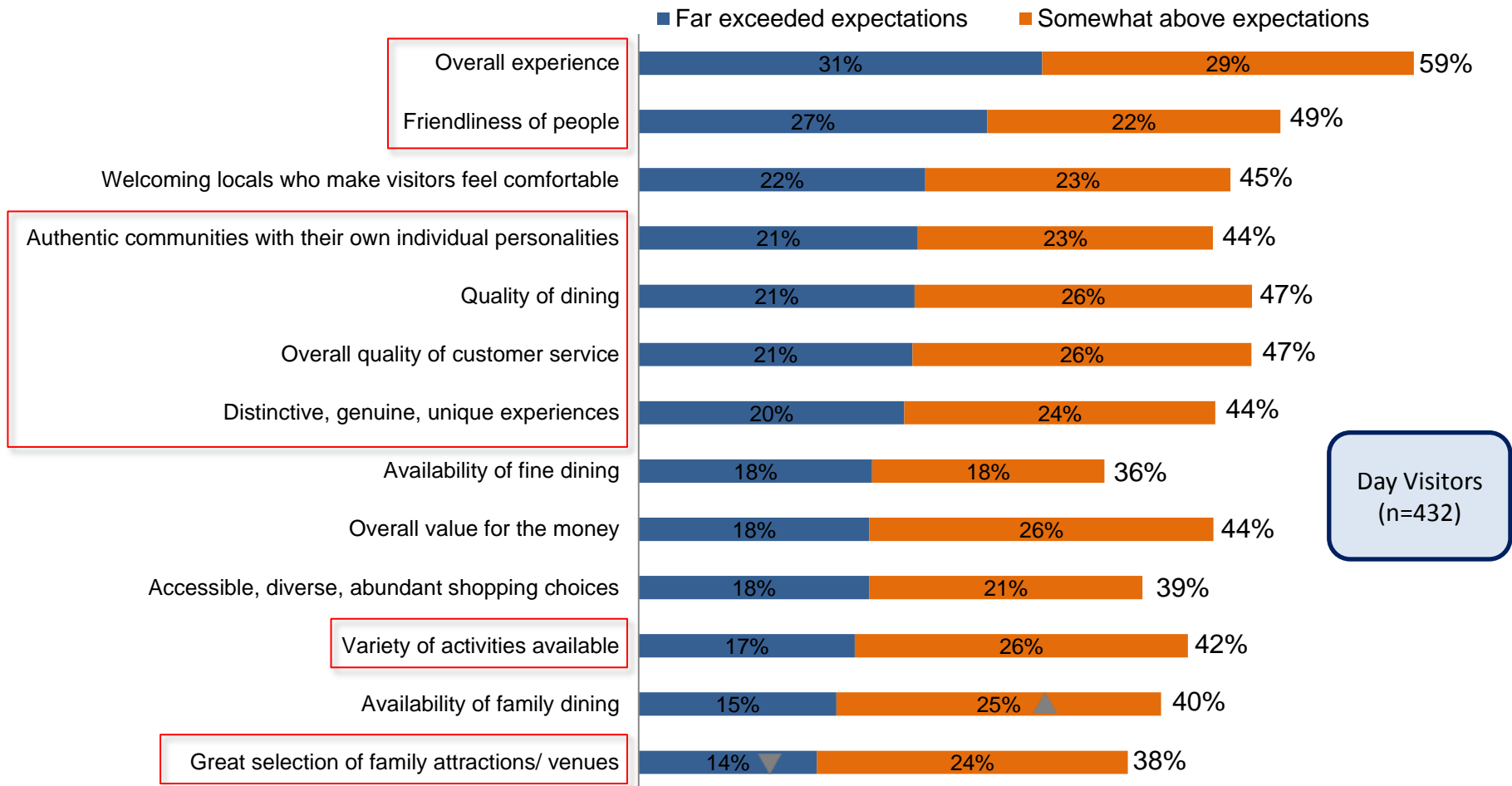
	Top 2 Box 2014 (n=871)	Top 2 Box 2015 (n=762)
Overall experience	63%	69% ▲
Friendliness of people	59%	67% ▲
Overall quality of customer service	55%	63% ▲
Welcoming locals who make visitors feel comfortable	57%	62%
Quality of dining	55%	61% ▲
Distinctive, genuine, unique experiences	52%	59% ▲
Overall value for the money	50%	58% ▲
Quality of lodging	46%	58% ▲
Authentic communities with their own individual personalities	51%	57% ▲
Variety of activities available	48%	55% ▲
Accessible, diverse, abundant shopping choices	48%	54% ▲
Availability of lodging	44%	54% ▲
Availability of family dining	46%	52% ▲
Availability of fine dining	43%	51% ▲
Great selection of family attractions/ venues	42%	50% ▲

Overnight Q35: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

Three in five Maine day visitors state their *overall experience* exceeded their expectations – lower than levels reported by overnight visitors.

- US visitors are more likely than Canadian visitors to indicate that their day trip in Maine exceeded their expectations for several items (indicated with red boxes).



Day Q27: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

Expectation ratings among day visitors were no better or worse than last year.

	Top 2 Box 2014 (n=451)	Top 2 Box 2015 (n=432)
Overall experience	59%	59%
Friendliness of people	54%	49%
Quality of dining	48%	47%
Overall quality of customer service	49%	47%
Welcoming locals who make visitors feel comfortable	47%	45%
Distinctive, genuine, unique experiences	47%	44%
Overall value for the money	42%	44%
Authentic communities with their own individual personalities	45%	44%
Variety of activities available	42%	42%
Availability of family dining	38%	40%
Accessible, diverse, abundant shopping choices	43%	39%
Great selection of family attractions/ venues	40%	38%
Availability of fine dining	38%	36%

Day Q27: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

▲▼ notes significant difference between 2014 and 2015 at the 95% confidence level

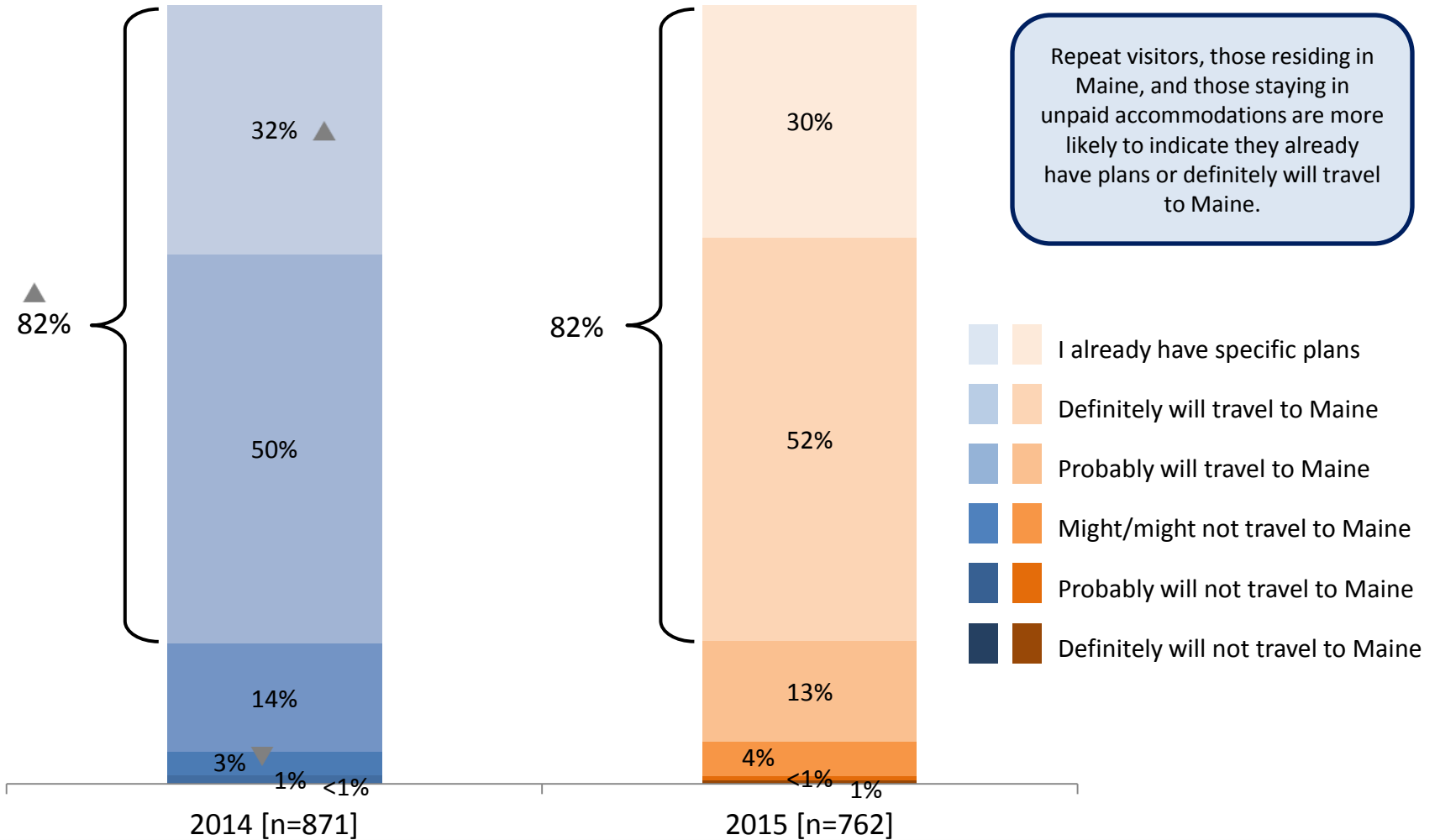
Future Travel



Three in ten overnight winter visitors already have specific plans to visit Maine again in the next two years.

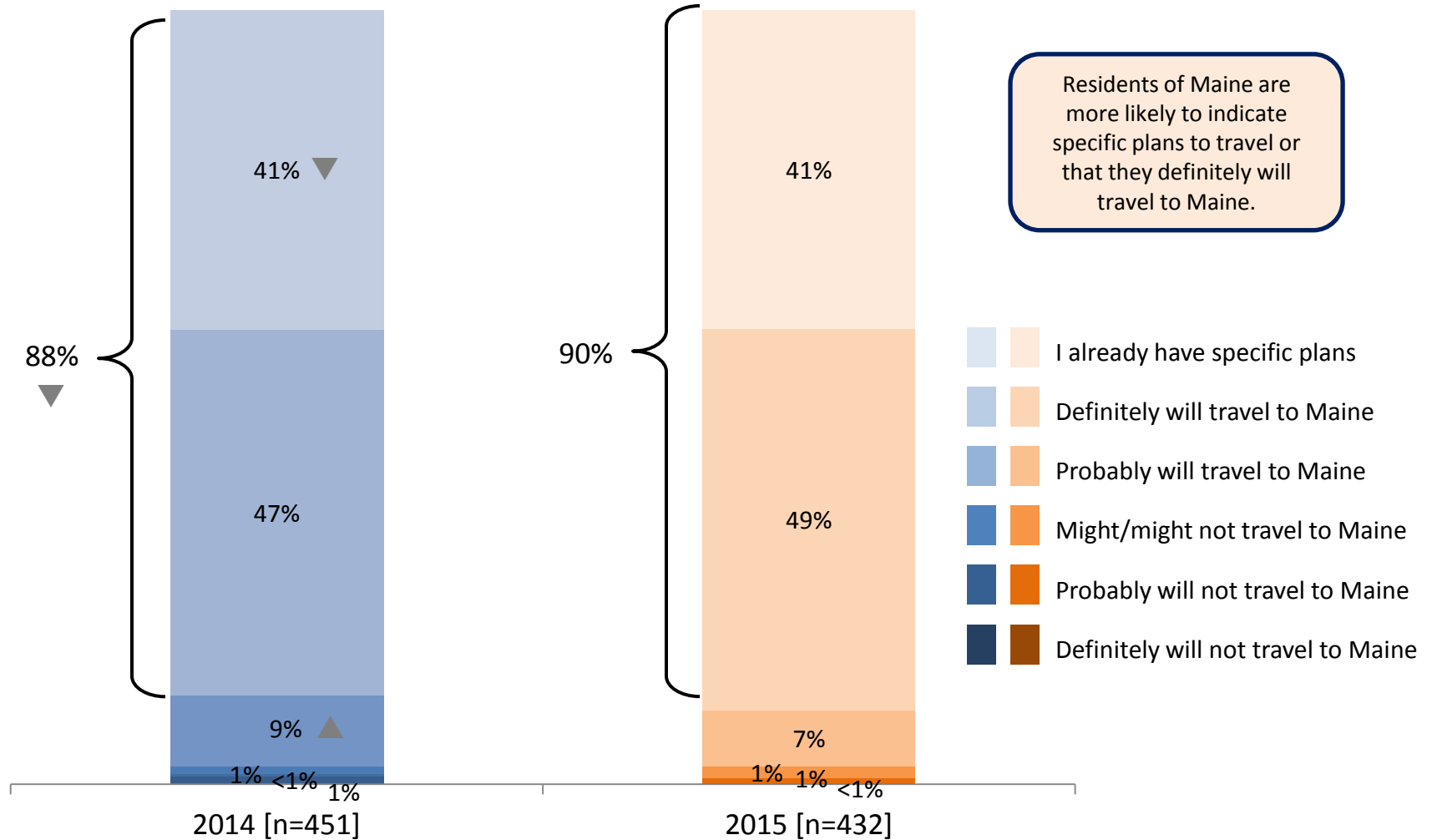
Likelihood of Trip to Maine in Next Two Years

Repeat visitors, those residing in Maine, and those staying in unpaid accommodations are more likely to indicate they already have plans or definitely will travel to Maine.



In contrast, four in ten winter day visitors have specific plans to return to Maine in the next two years.

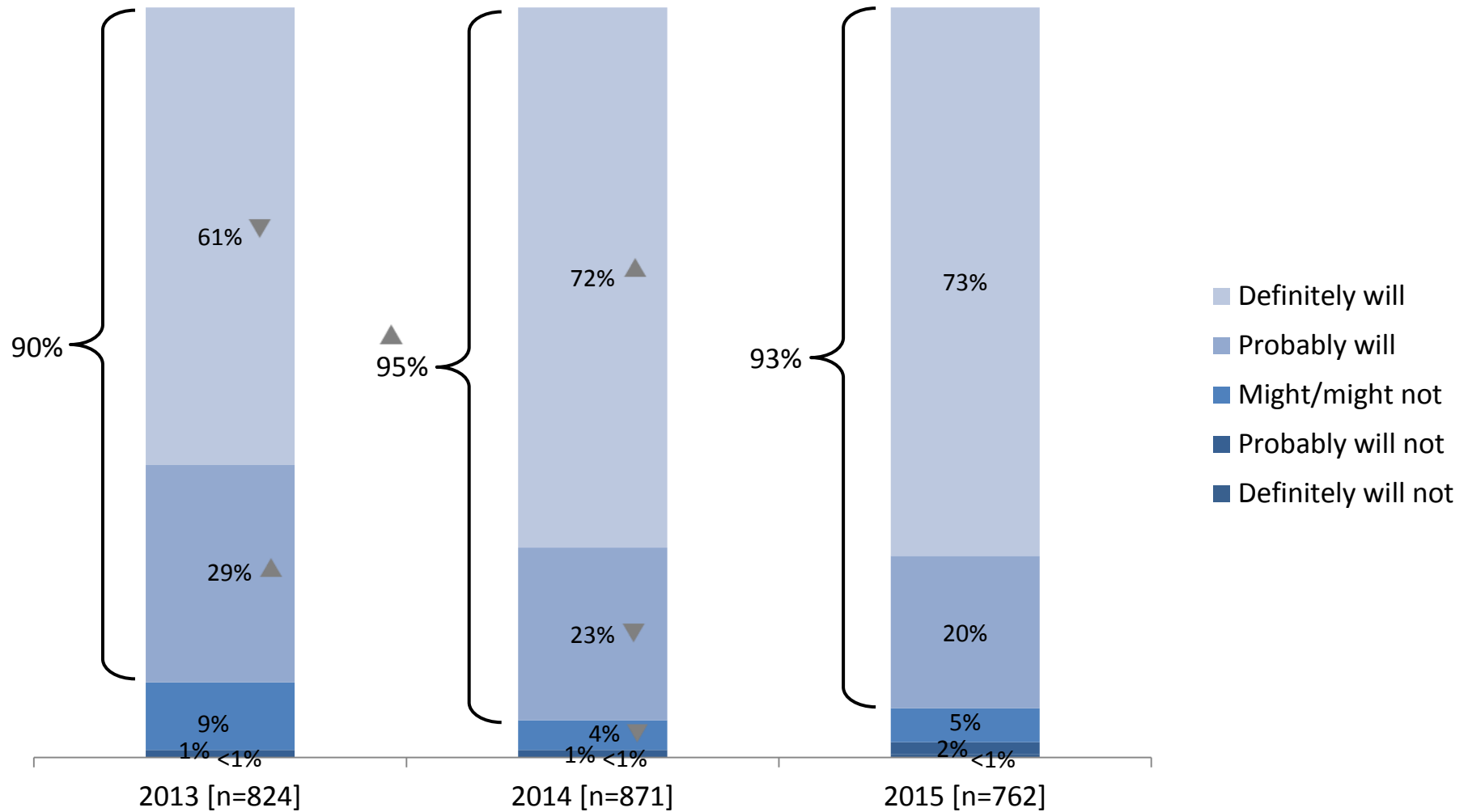
Likelihood of Trip to Maine in Next Two Years



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

▲▼ notes significant difference from the prior year at the 95% confidence level

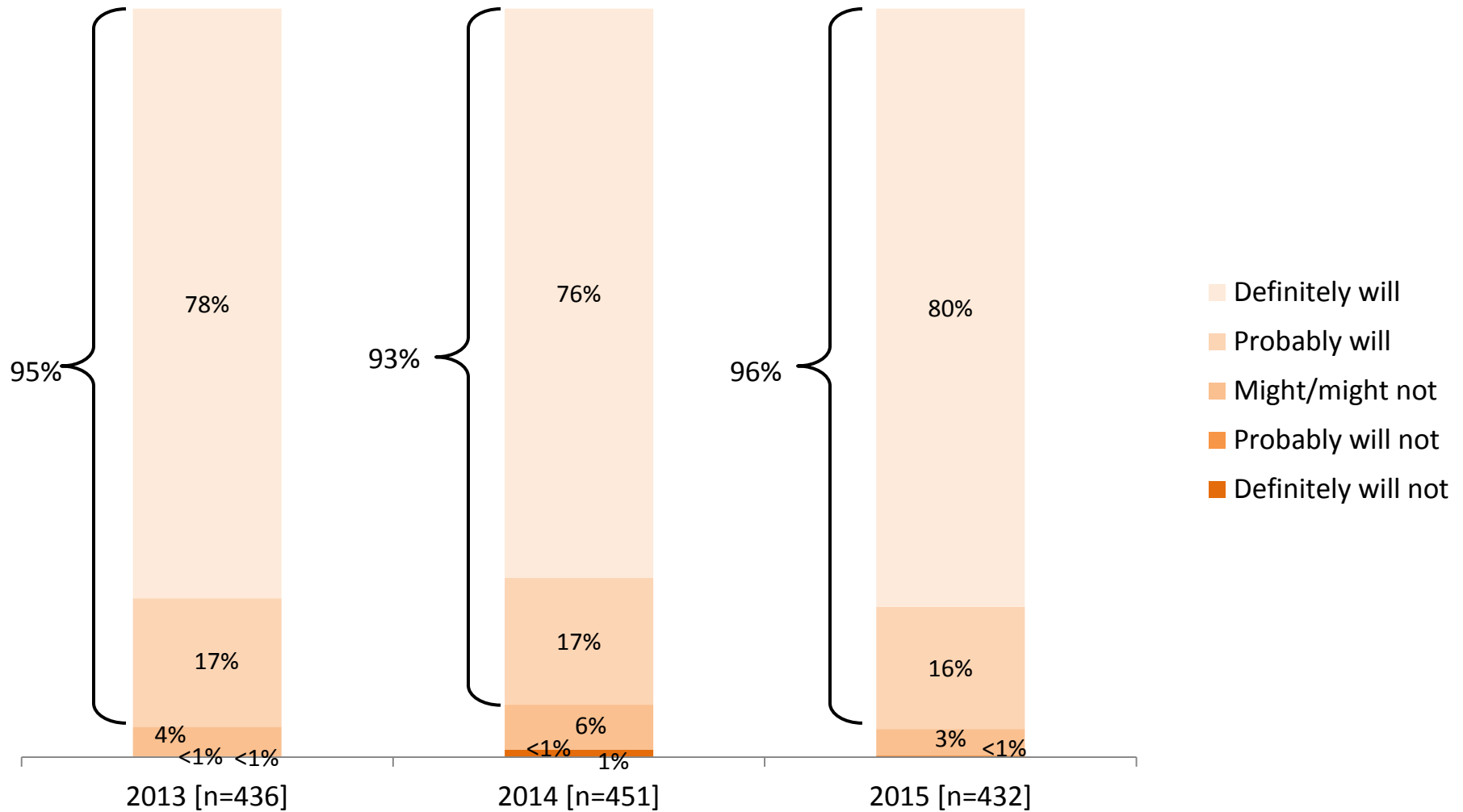
Consistent with prior years, nine in ten overnight winter visitors indicate they will recommend Maine as a vacation destination.



Overnight Q39: How likely are you to recommend Maine as a vacation destination to friends or relatives?

▲▼ notes significant difference from the prior year at the 95% confidence level

Day visitors are similarly enthusiastic about their Maine vacation, with 96% indicating a likelihood 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 from the prior year at the 95% confidence level



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