



Maine Office of Tourism Visitor Tracking Research Fall 2016 Seasonal Topline *(September – November 2016)*



Prepared by



January 2017

Objectives and Methodology

Objectives

Three distinct online surveys are used to accomplish the five primary goals of this visitor tracking research.

Research Objectives	Survey Instruments		
	National Omnibus	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 devoted to tourism in Maine		✓	✓
Determine the Maine traveler's level of satisfaction and view of Maine		✓	✓

Description of Survey Instruments

National Omnibus Survey

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

Overnight Visitor Survey

- 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 Survey

- Sampled from Maine and a 100-mile radius of Maine's borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

Methodology

- This report outlines results from the Fall 2016 travel season, describing travel that occurred between September and November 2016.
- Fall data collection occurred monthly between October 3 and December 19, 2016. The number of completed surveys collected for each research component are as follows:

Research Component	Completed Fall Season Surveys
Overnight Visitor Survey	712
Day Visitor Survey	507
National Omnibus Survey	9,277

- Throughout this report, the acronym VFR stands for “visiting friends or relatives.”
- *Statistical significance between subgroups was calculated at the 95% confidence level and is noted throughout by a/b/c/etc. or ▲▼.*

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.
- In addition to further background information on the segmentation research, the Appendix to this report provides a topline profile and comparison of the three priority segments that emerged from the research, as they relate to Maine's Fall visitors.

Executive Summary

2016 Fall Visitation Estimates

10.3 million visitors
came to Maine during
the Fall of 2016

6.1 million stayed
overnight

4.2 million visited for
the day

2016 Fall Visitor Profile

Average Age

Overnight Visitor – 43 yrs

Day Visitor – 45 yrs

First-Time Visitors

22% Overnight

6% Day

Overnight Visitor Origin

56% New England

29% Mid-Atlantic

15% Canada

Day Visitor Origin

92% U.S. (primarily MA & ME)

8% Canada

2016 Fall Trip Profile

Top Visitor Interest Areas

Food/Beverage/Culinary

Shopping

Touring/Sightseeing

Active Outdoor/Water Activities

Top Regional Destination

Maine Beaches Region

Paid Accommodations

62% of overnight visitors stayed
in paid accommodations

Average Length of Stay

3.3 nights

2016 Fall Visitor Satisfaction

Aspects of Trip Most Exceeding Visitor Expectations

Overall experience
Friendliness of the people

Intend to Visit in Next Two Years

79% of overnight visitors
85% of day visitors

Intend to Recommend Maine

95% of overnight visitors
96% of day visitors

Day Visitors Extending Stay

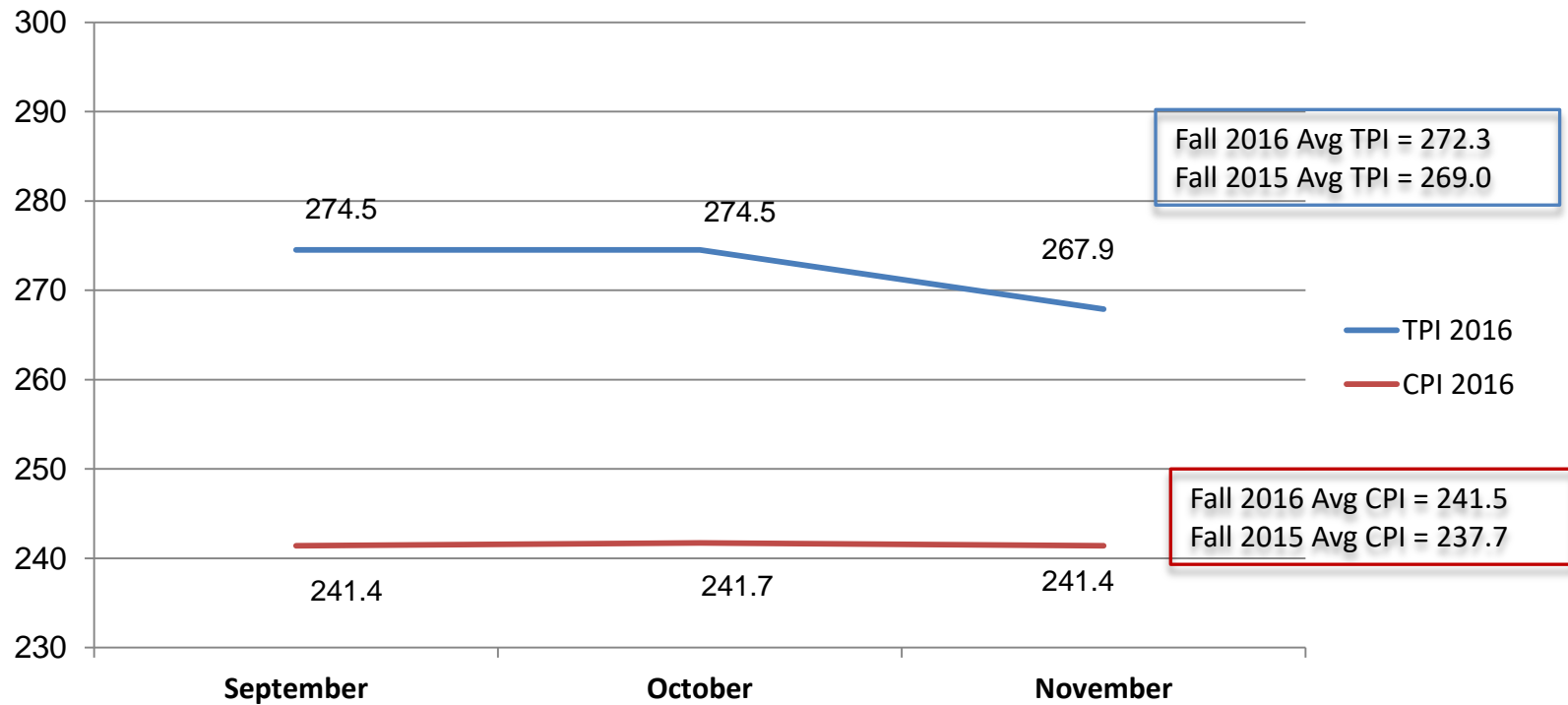
63% of day visitors likely to visit
Maine in the next two years say
they will “definitely stay
overnight” on their next visit.

2016 Fall Season Travel Context

The cost to travel (Travel Price Index) remains higher than the cost of consumer goods and services overall (Consumer Price Index).

- After a year-over-year drop in the average TPI during recent seasons, this Fall showed a slight year-over-year increase in both the average TPI and CPI.

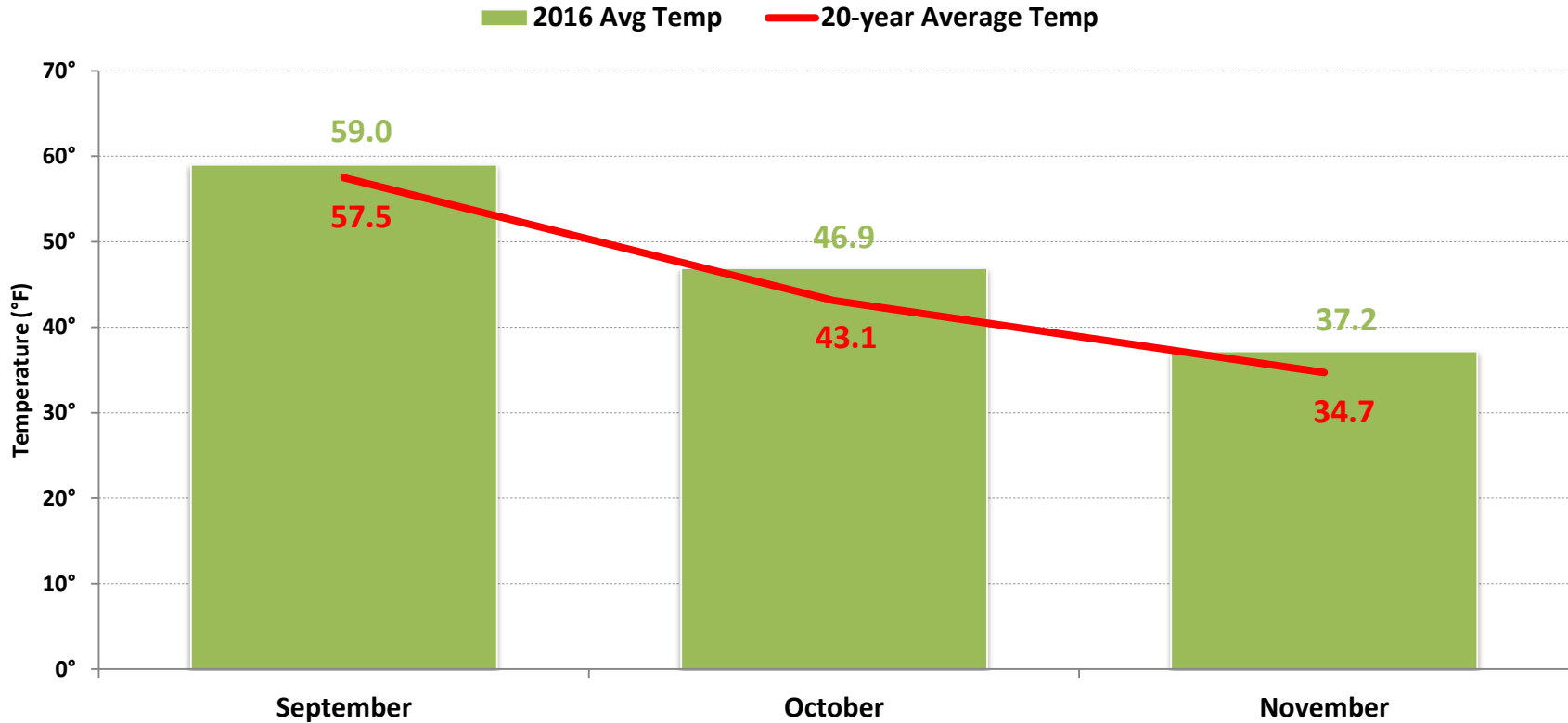
Consumer Price Index and Travel Price Index



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

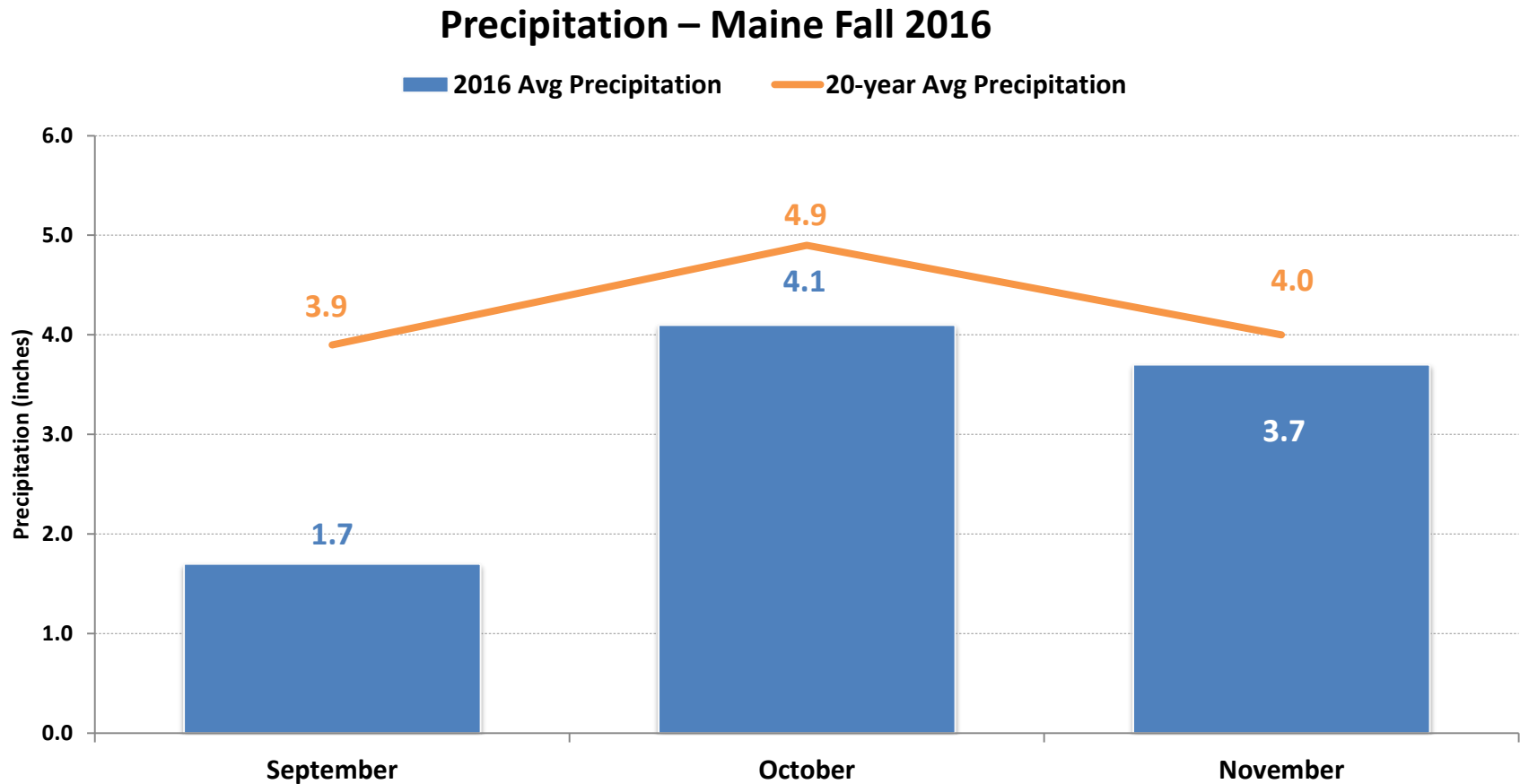
Fall temperatures in 2016 trended above the 20-year average for the State.

Temperature – Maine Fall 2016



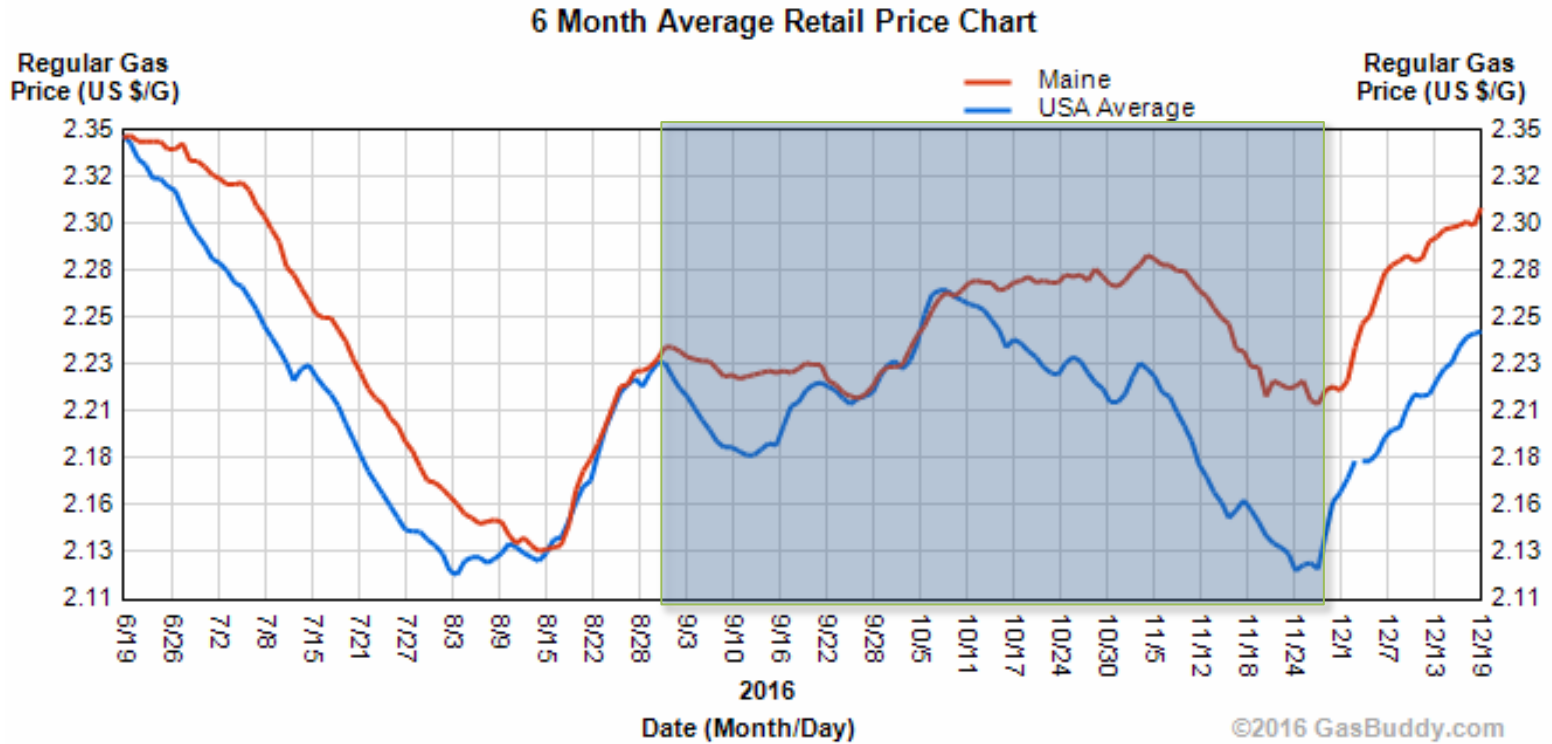
Data source: National Oceanic and Atmospheric Administration, U.S. Department of Commerce

Precipitation during the Fall of 2016 was below the 20-year average for the State of Maine.

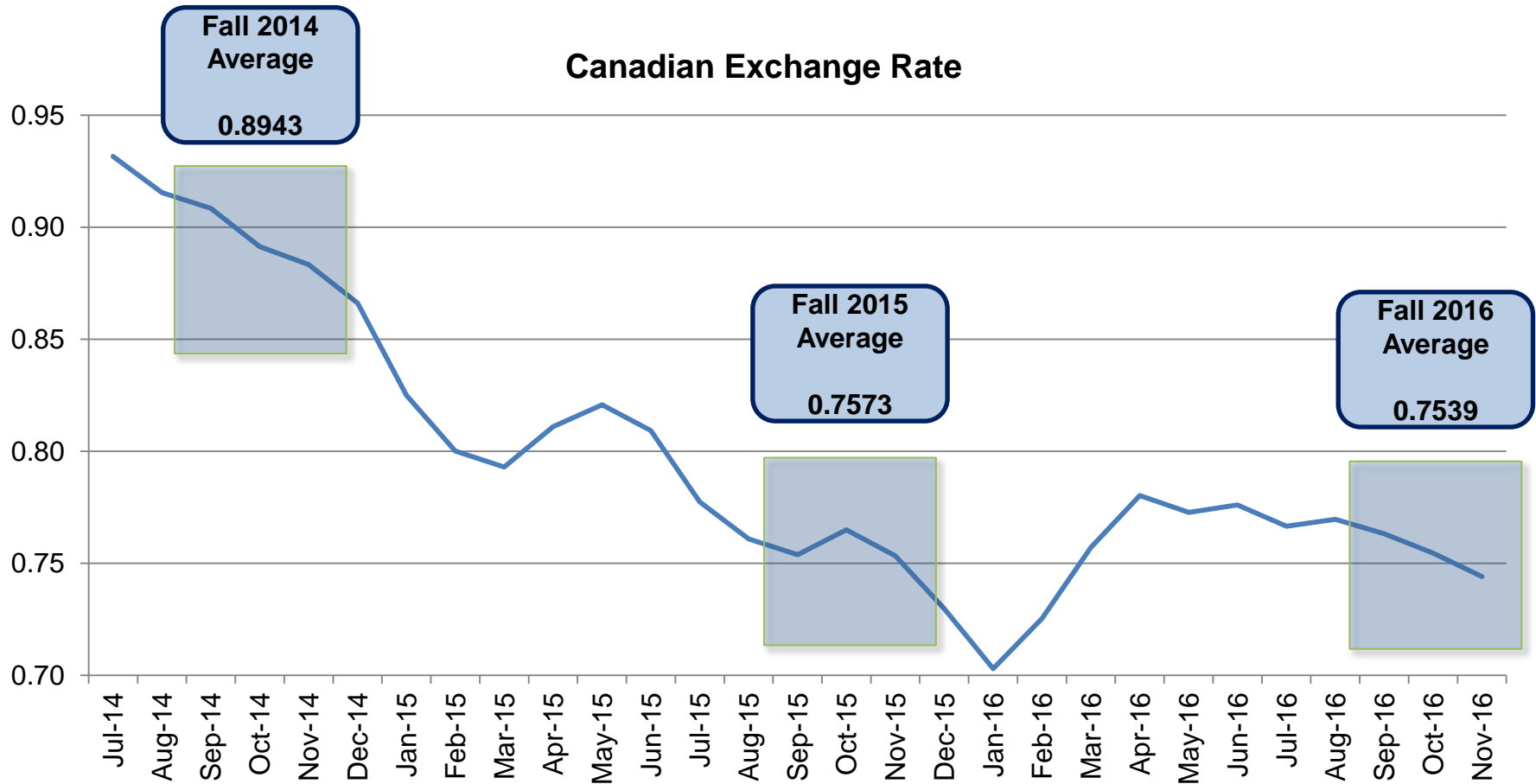


Data source: National Oceanic and Atmospheric Administration, U.S. Department of Commerce

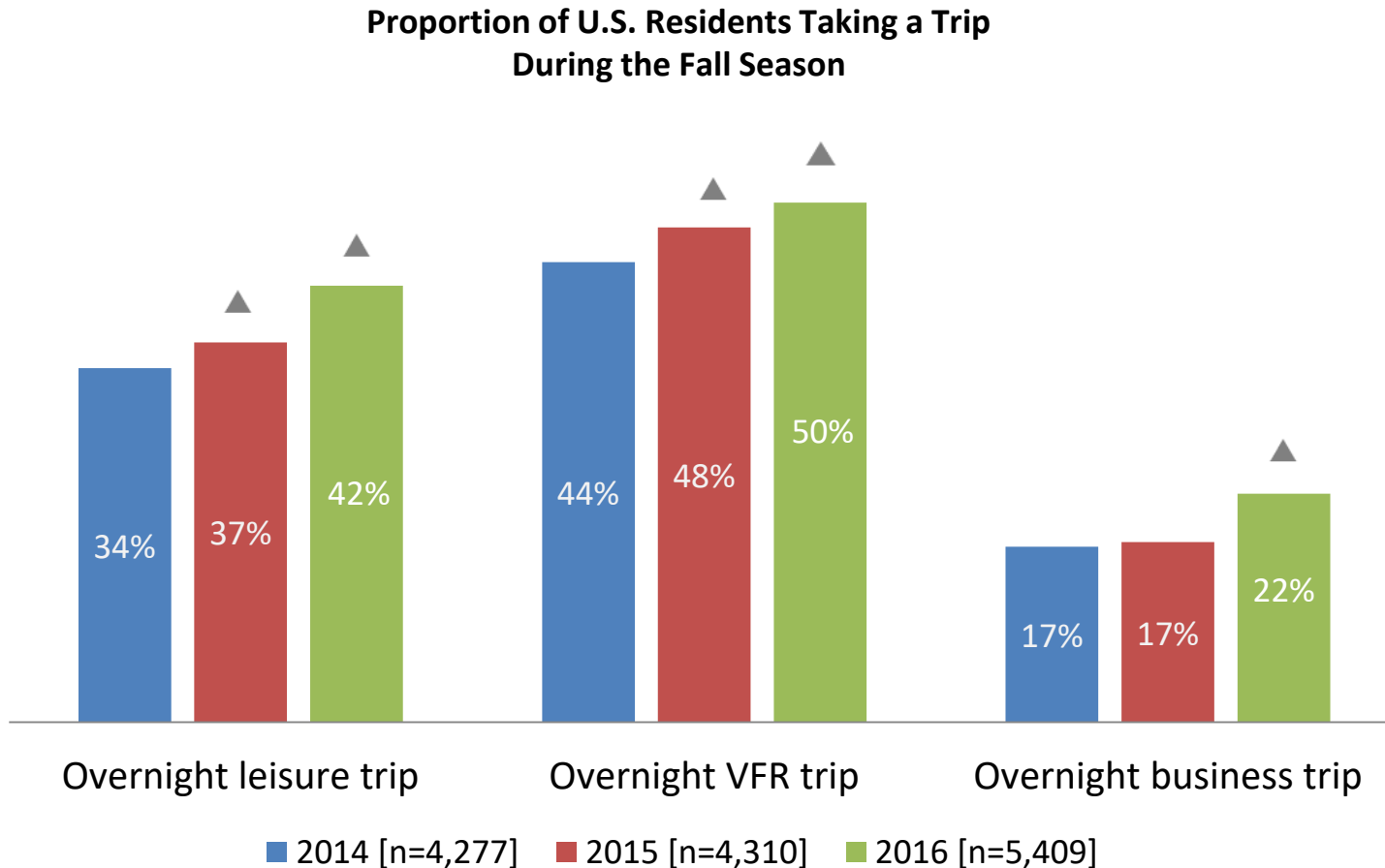
Gas continued to be more expensive in Maine than in the U.S. overall during the Fall, not varying much from the previous Fall season (2015).



The Canadian exchange rate remains stable, though unfavorable, when compared to the prior Fall season. This follows a sharp decline that began during the early months of 2013.



During the Fall of 2016, nationwide travel continued the year-over-year increase seen throughout 2015 and in the Winter and Summer seasons of 2016.



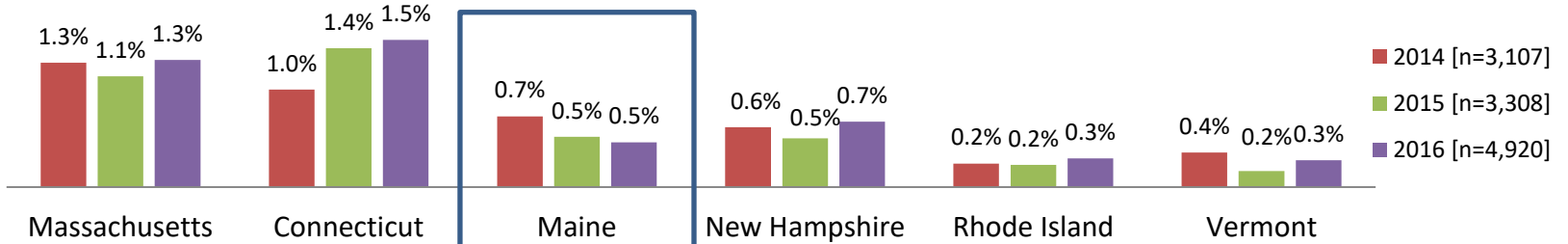
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

▲▼ notes significant difference between years at the 95% confidence level

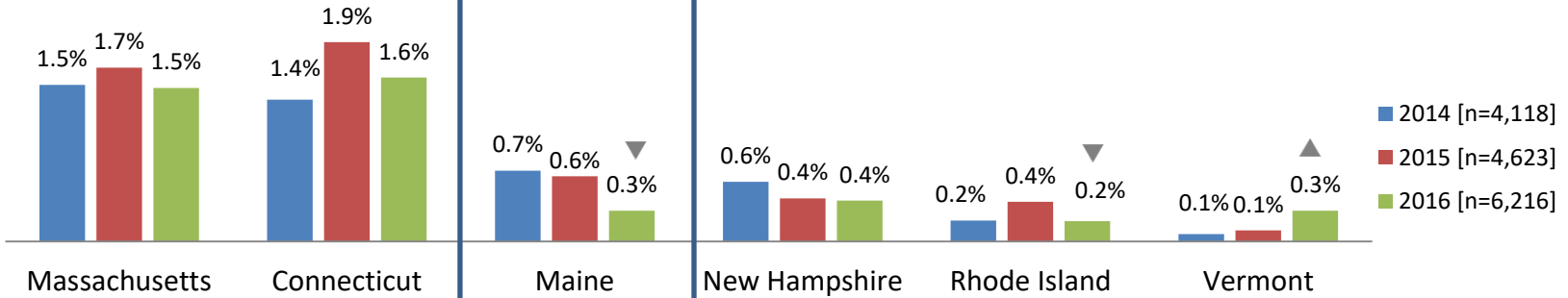
Maine continues to hold on to just under 1% of the national overnight leisure travel market.

Share of Total Trips Taken by U.S. Residents

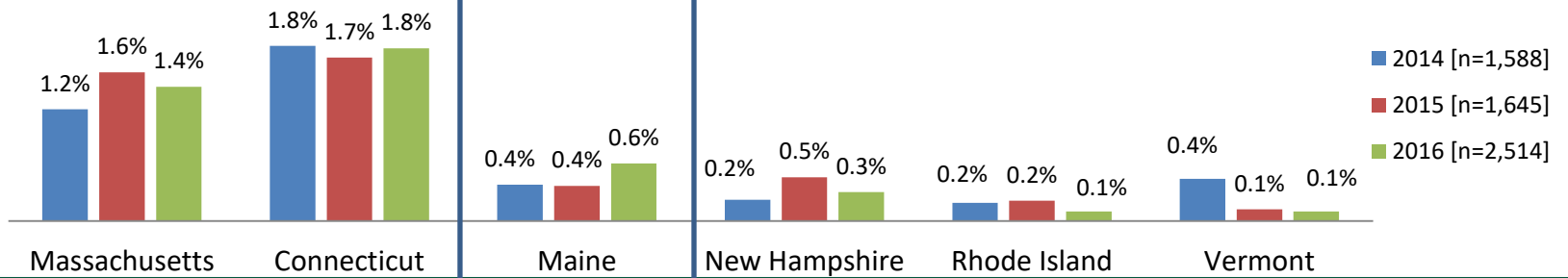
Overnight Leisure Trips



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 2014, 2015, and 2016 at the 95% confidence level

2016 Fall Season Highlights

The Fall of 2016 brought continued year-over-year growth, with estimated overall visitation to Maine increasing more than 5%.

Note: Visitation estimates provided here are preliminary and reflect visitation from September through November 2016. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

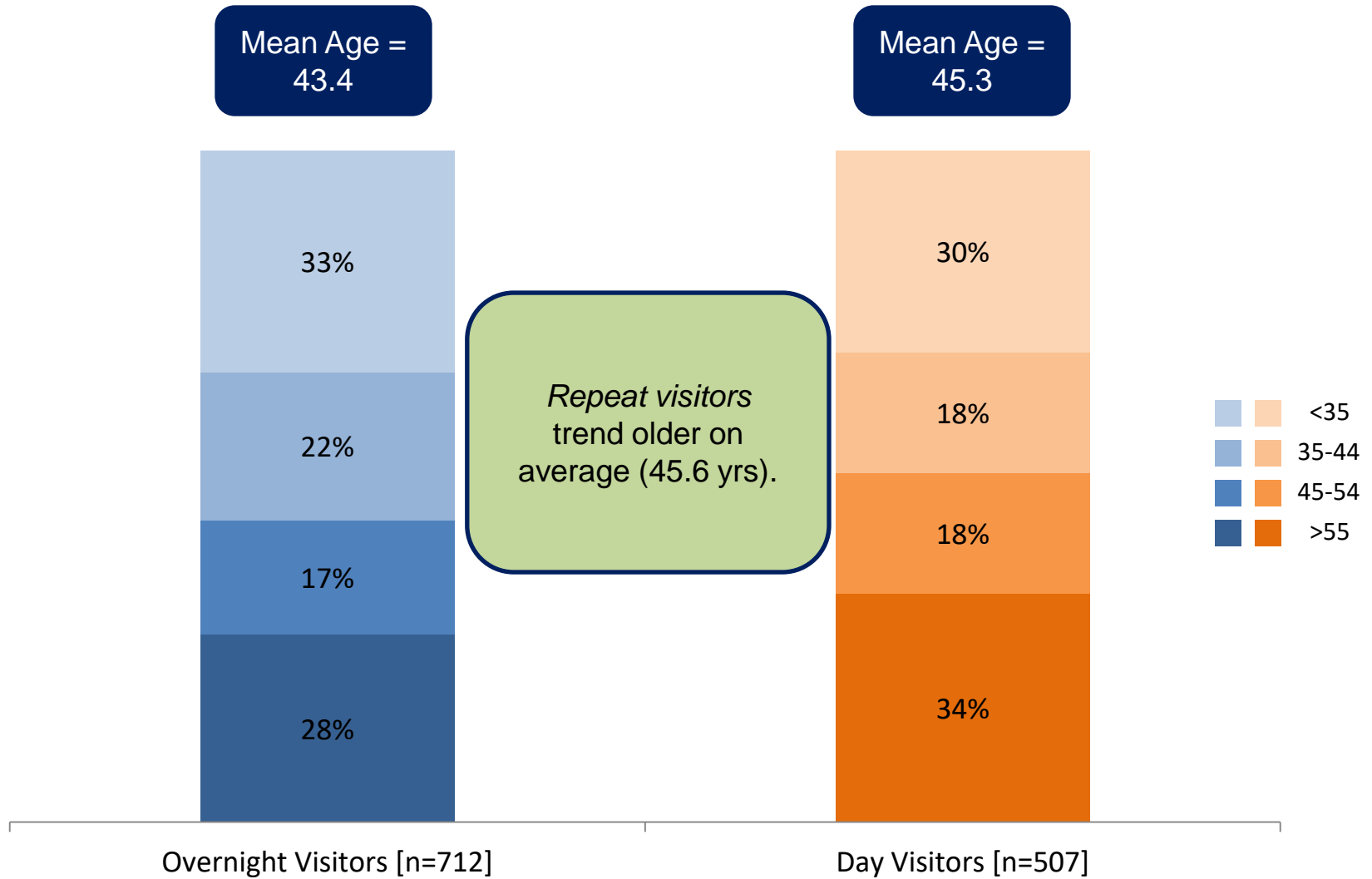
Visitation Estimates*	Fall 2015	Fall 2016	% Chg
Total Estimated Visitation	9,782,253	10,303,506	+ 5.3%
<i>Overnight Visitors</i>	<i>5,881,374</i>	<i>6,064,035</i>	<i>+ 3.1%</i>
<i>Day Visitors</i>	<i>3,900,879</i>	<i>4,239,471</i>	<i>+ 8.7%</i>

**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; and*
- Business trips that are for a convention/conference/trade show or training/professional development.*

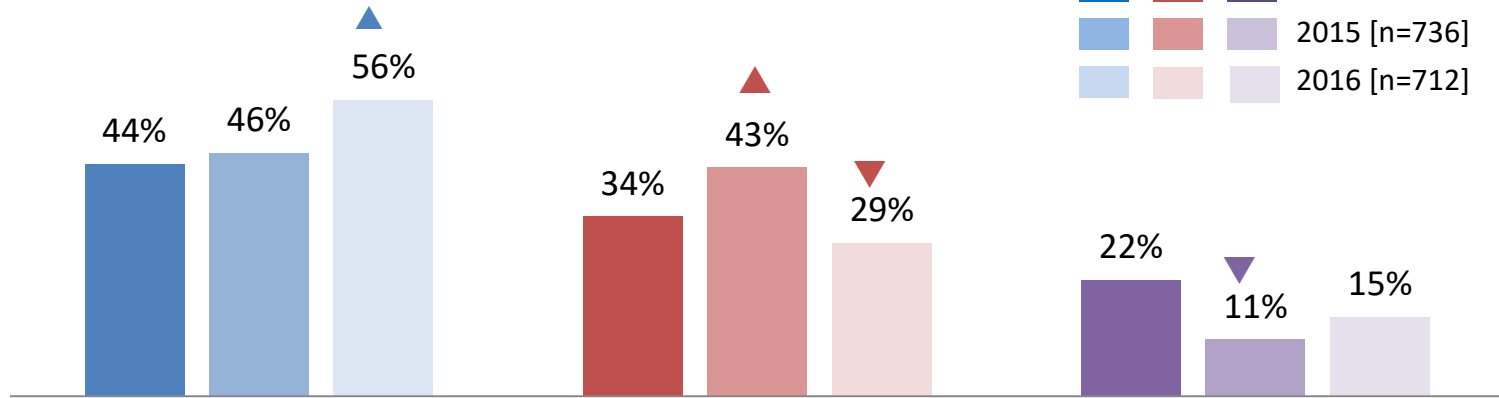
The typical Fall visitor to Maine is in their mid-forties.



Compared to the previous Fall, the 2016 Fall season showed an increase in the proportion of overnight visitors from New England and a decrease in the proportion from the Mid-Atlantic.

Visitor Origin of Maine Overnight Visitors

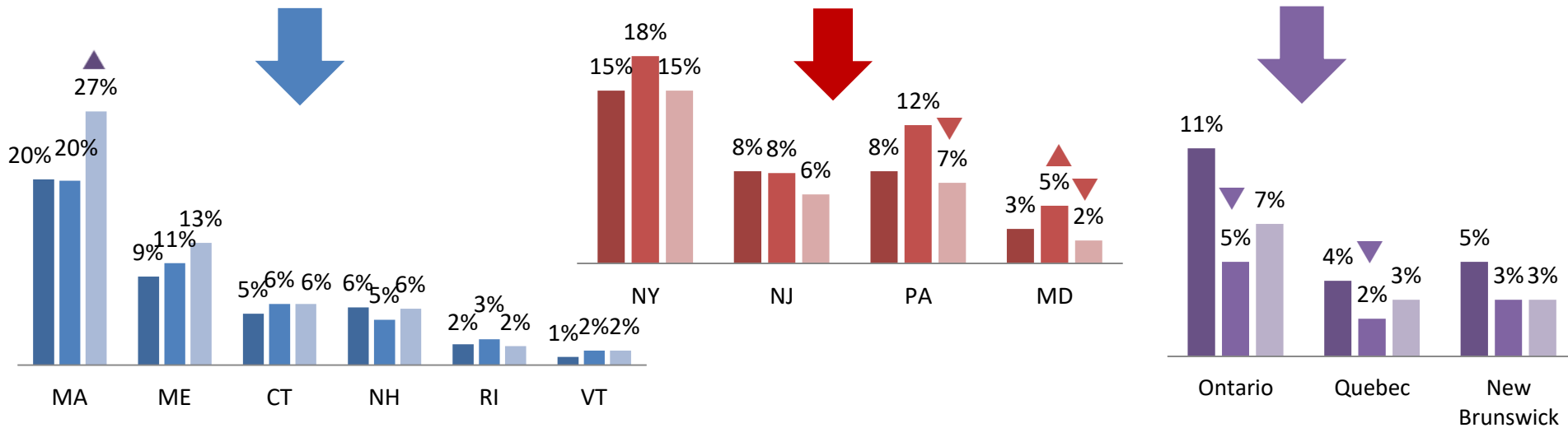
■ 2014 [n=715]
■ 2015 [n=736]
■ 2016 [n=712]



U.S. - New England

U.S. - Mid Atlantic

Canada



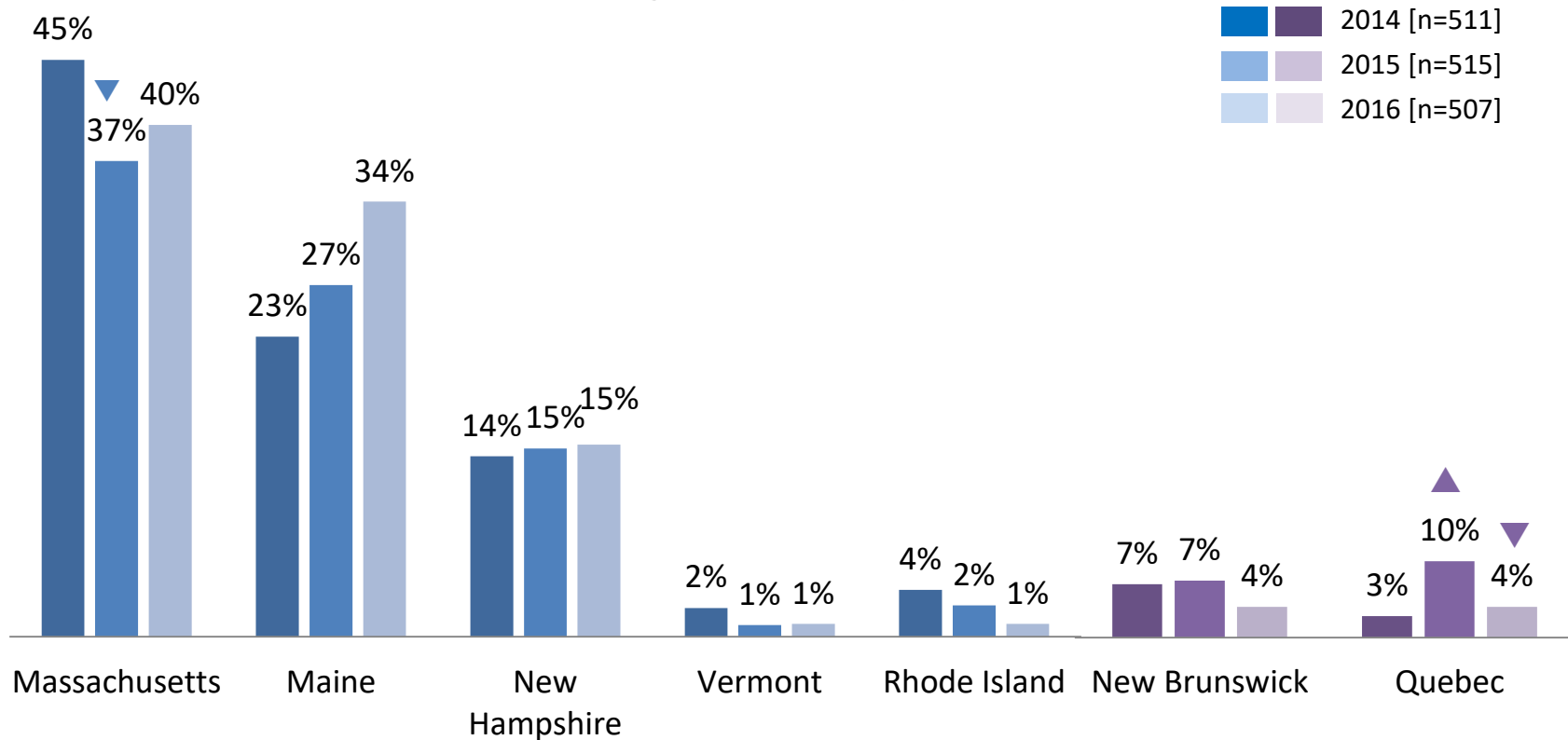
State/Province of Residence

▲ ▼ notes significant difference between years at the 95% confidence level

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

- After increasing last Fall, the proportion of day visitors coming to Maine from Quebec in the Fall of 2016 returned to levels seen in prior years.

Visitor Origin of Maine Day Visitors

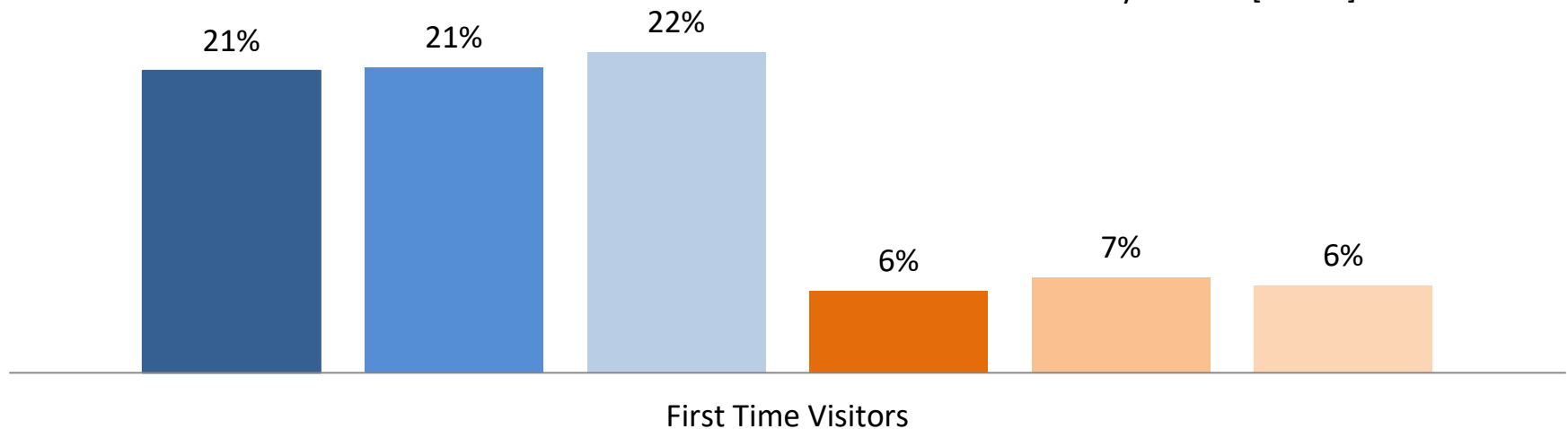


First-time visitors comprised one-fifth of Maine's overnight visitors during the Fall of 2016.

First-Time Overnight Visitors:

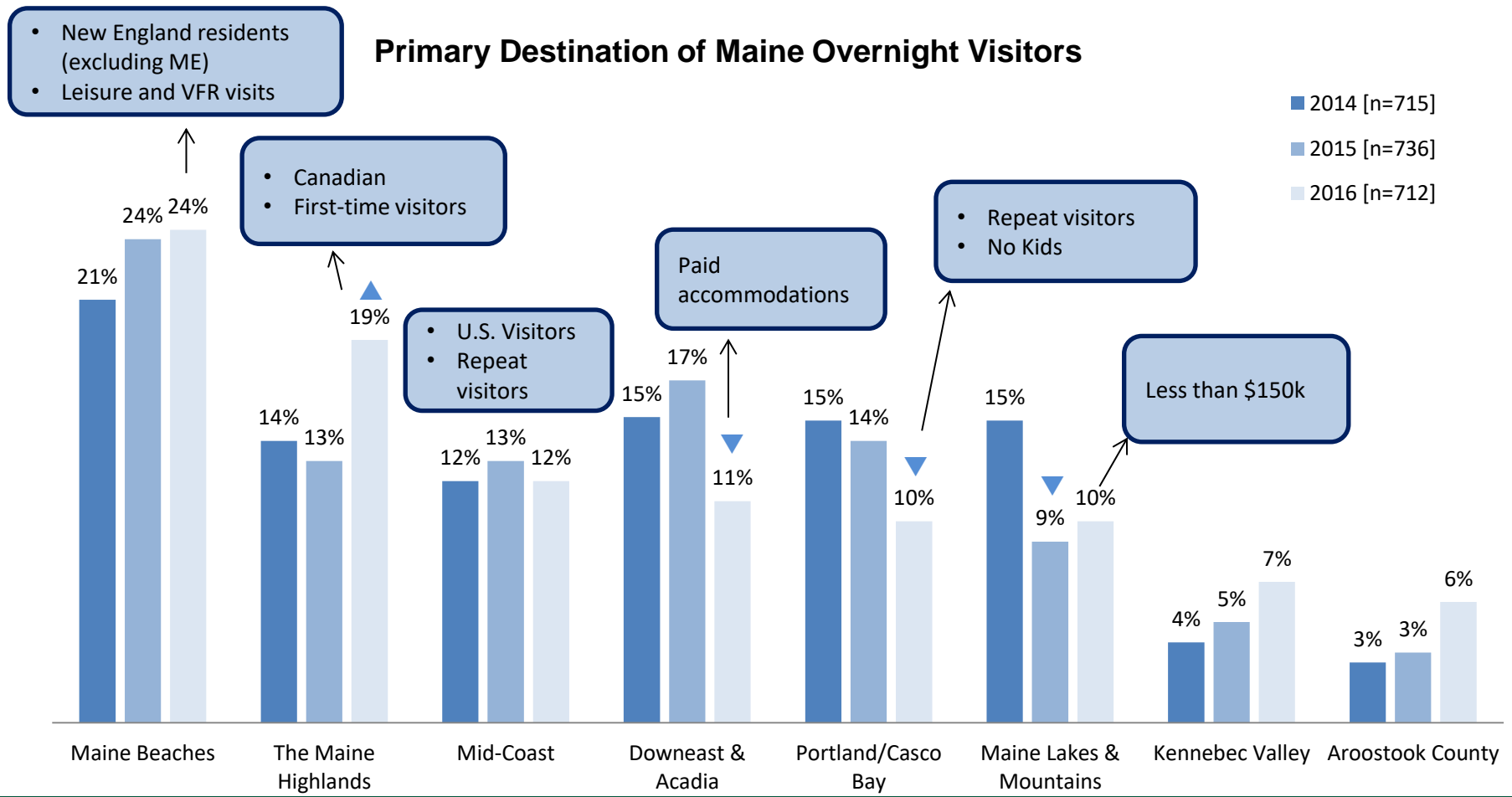
- More likely to be *Canadian*
- More likely to be on a *business trip*
- More likely to be categorized as *Balanced Achievers* (36%) than *Genuine Originals* (9%)

- 2014 Overnight Visitors [n=715]
- 2015 Overnight Visitors [n=736]
- 2016 Overnight Visitors [n=712]
- 2014 Day Visitors [n=511]
- 2015 Day Visitors [n=515]
- 2016 Day Visitors [n=507]



One-fourth of Maine's overnight visitors during the Fall of 2016 say the *Maine Beaches* region was their primary destination.

- Fall 2016 visitors are more likely to visit the *Maine Highlands* region and less likely to visit the *Downeast & Acadia* and *Greater Portland/Casco Bay* regions as compared to Fall 2015 visitors.
- The popularity of various regions differs between different sub-groups, as shown in the boxes in the chart below.



Overnight Q25. What region in Maine was your primary destination?

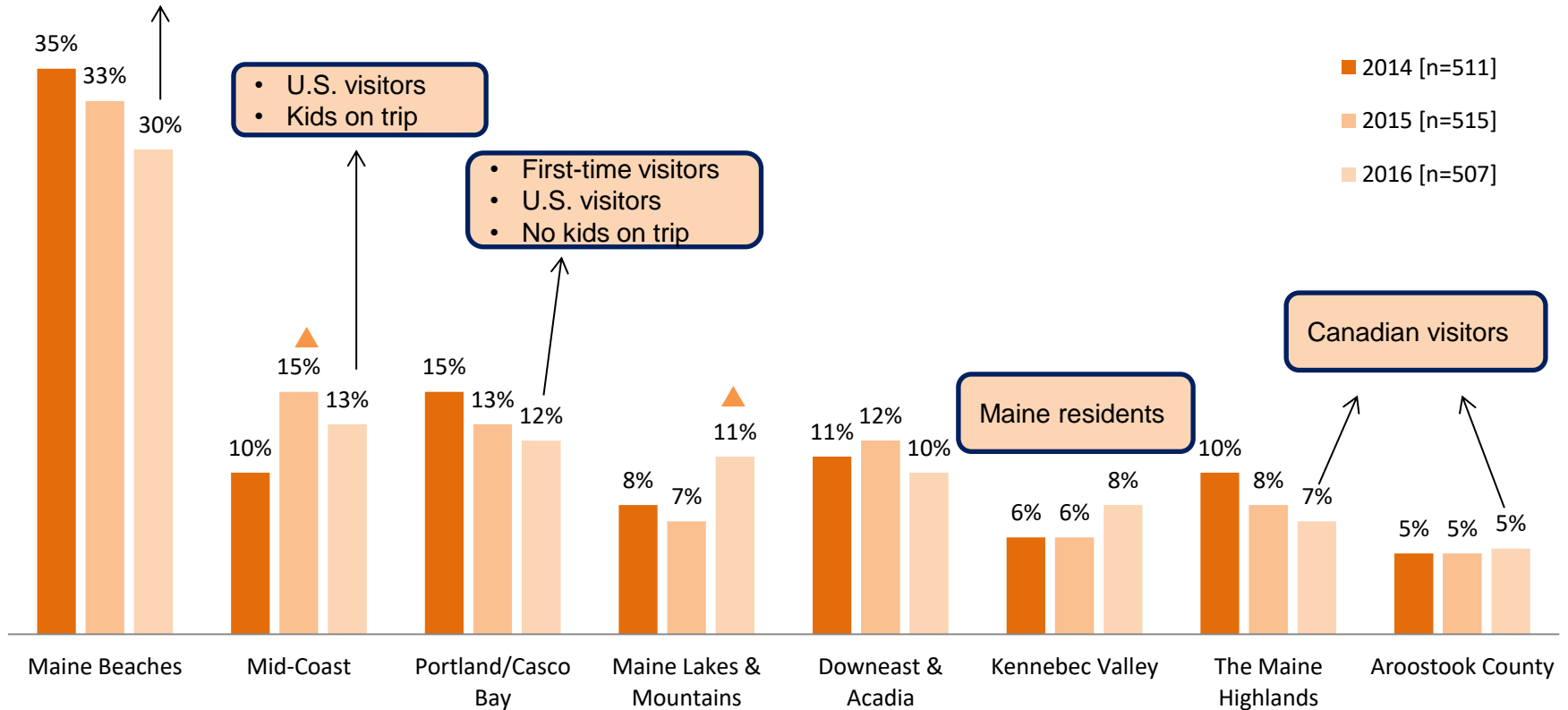
▲ ▼ notes significant difference between years at the 95% confidence level

As in prior years, Fall day visitors are most likely to be visiting the Maine Beaches region.

- The *Lakes & Mountains* region showed an increase in the proportion of day visitors this Fall.
- The popularity of various regions differs between different sub-groups, as shown in the chart below.

- Leisure visitors
- New England visitors

Primary Destination of Maine Day Visitors



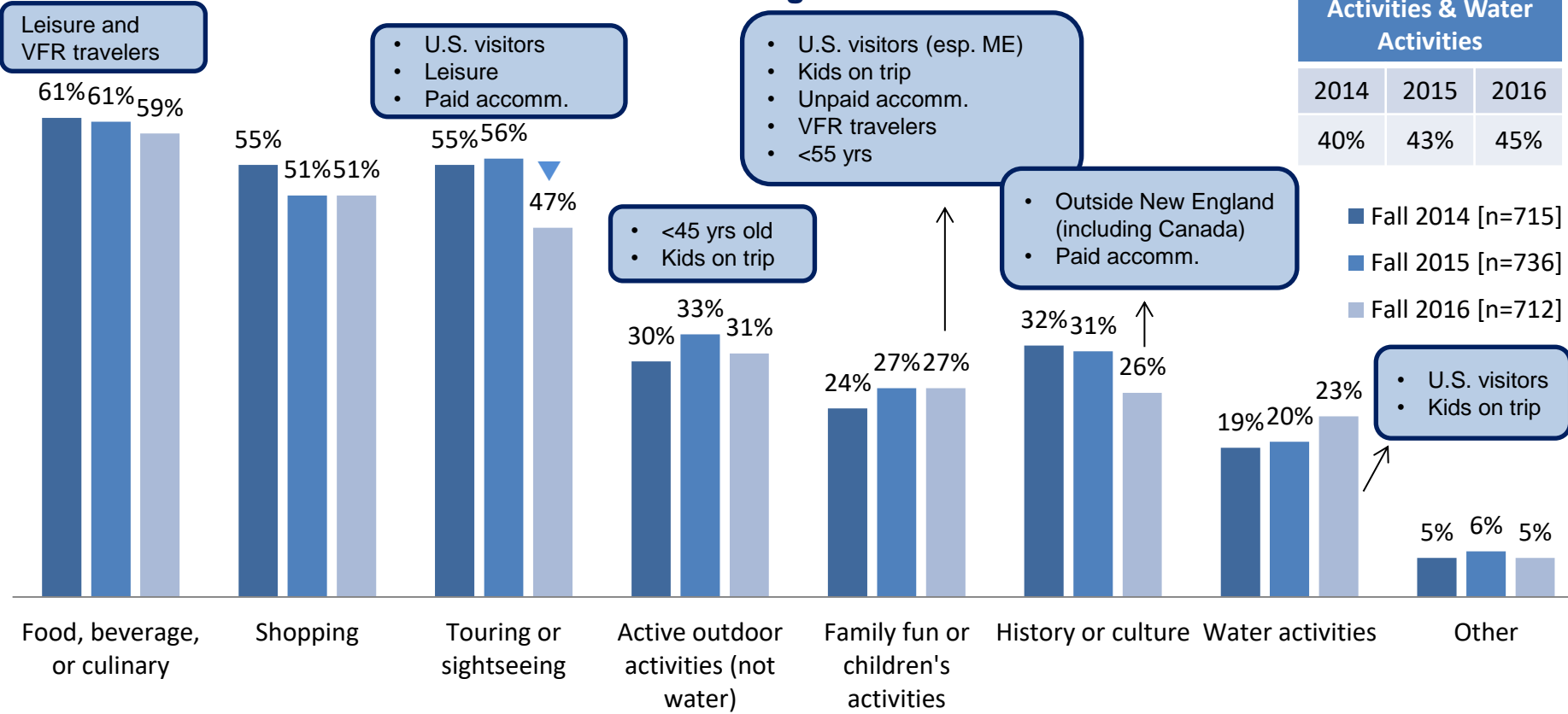
Day Q21. What region in Maine was your primary destination?

▲ ▼ notes significant difference between years at the 95% confidence level

Most 2016 Fall overnight visitors were interested in exploring Maine's food/beverage/culinary options or doing some shopping.

- The proportion of overnight visitors interested in *touring/sightseeing* is lower in 2016 than the past two Fall seasons (2014 and 2015).
- The sub-groups of overnight visitors that are more likely to express interest in certain areas are illustrated in the chart below.

Travel Interest Areas of Maine Fall Overnight Visitors

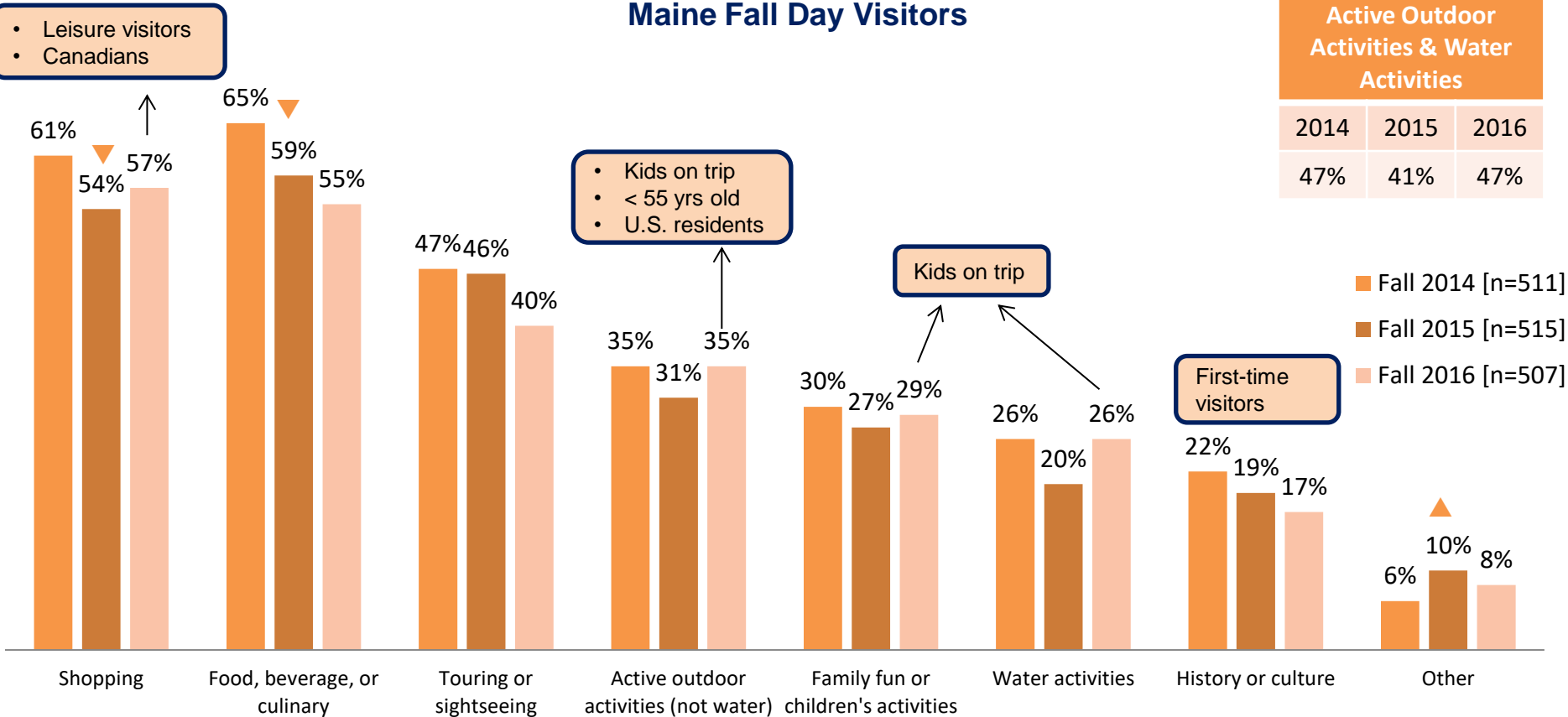


As with overnight visitors, *shopping and food/beverage/culinary* interests remain the most popular among day visitors during the Fall.

- The sub-groups of day visitors that are more likely to express interest in certain areas are illustrated in the chart below.

Travel Interest Areas of Maine Fall Day Visitors

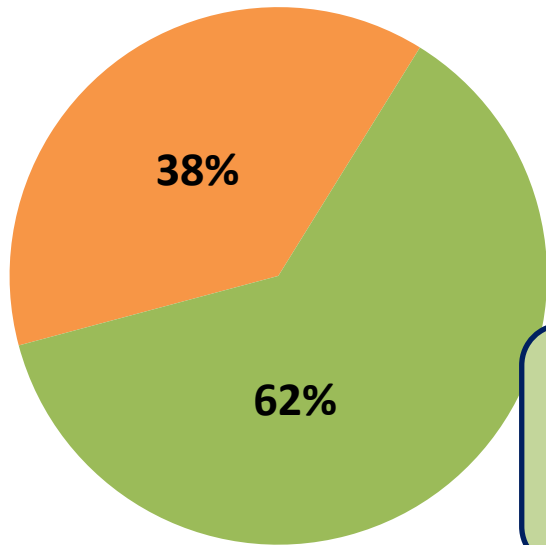
NET OUTDOOR: Active Outdoor Activities & Water Activities		
2014	2015	2016
47%	41%	47%



Nearly two-thirds of overnight Fall visitors stayed in paid accommodations.

- The proportion of overnight visitors staying in paid accommodations is lower this Fall than the prior two Fall seasons (71% in 2015 and 69% in 2014), but similar to Fall seasons before 2014.

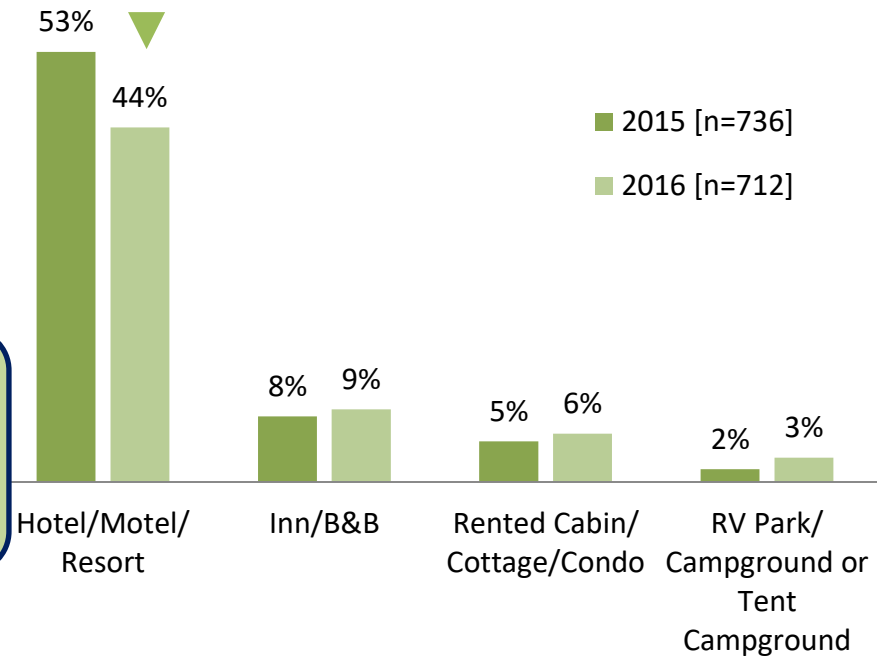
Type of Accommodation
[n=712]



■ Unpaid Accommodations ■ Paid Accommodations

Canadian visitors and first-time visitors are more likely to stay in paid accommodations.

Type of Paid Accommodation



Average Length of Stay: 3.3 Nights
Longer for visitors traveling with children (3.7)

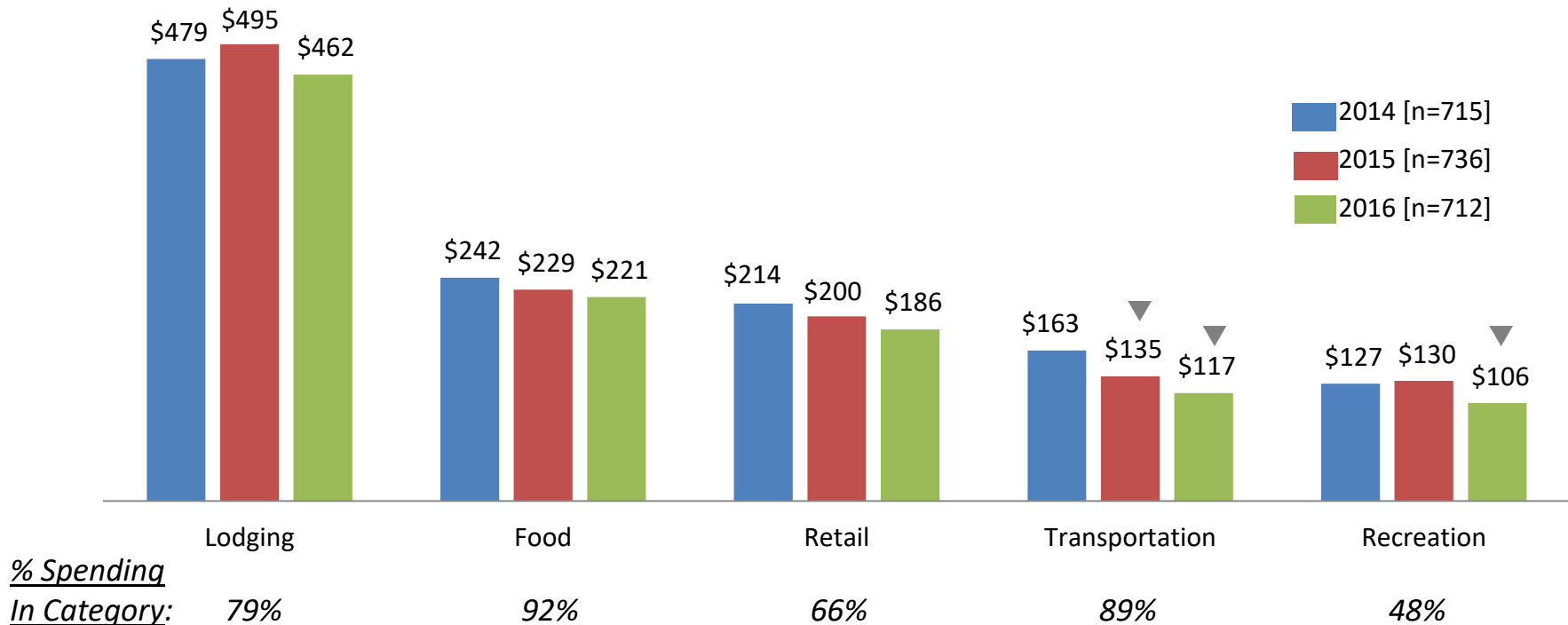
Overnight Q10. On this trip to Maine, how many nights were you away from home?

Overnight Q24. In which of the following types of accommodations did you spend the most nights on this trip to Maine?

▲ ▼ notes significant difference between years at the 95% confidence level

Lodging continues to make up the greatest share of expenditures for Fall overnight visitors.

Average Trip Spending per Travel Party – Overnight Visitors* (Base = Visitors Who Spent Anything in the Category)



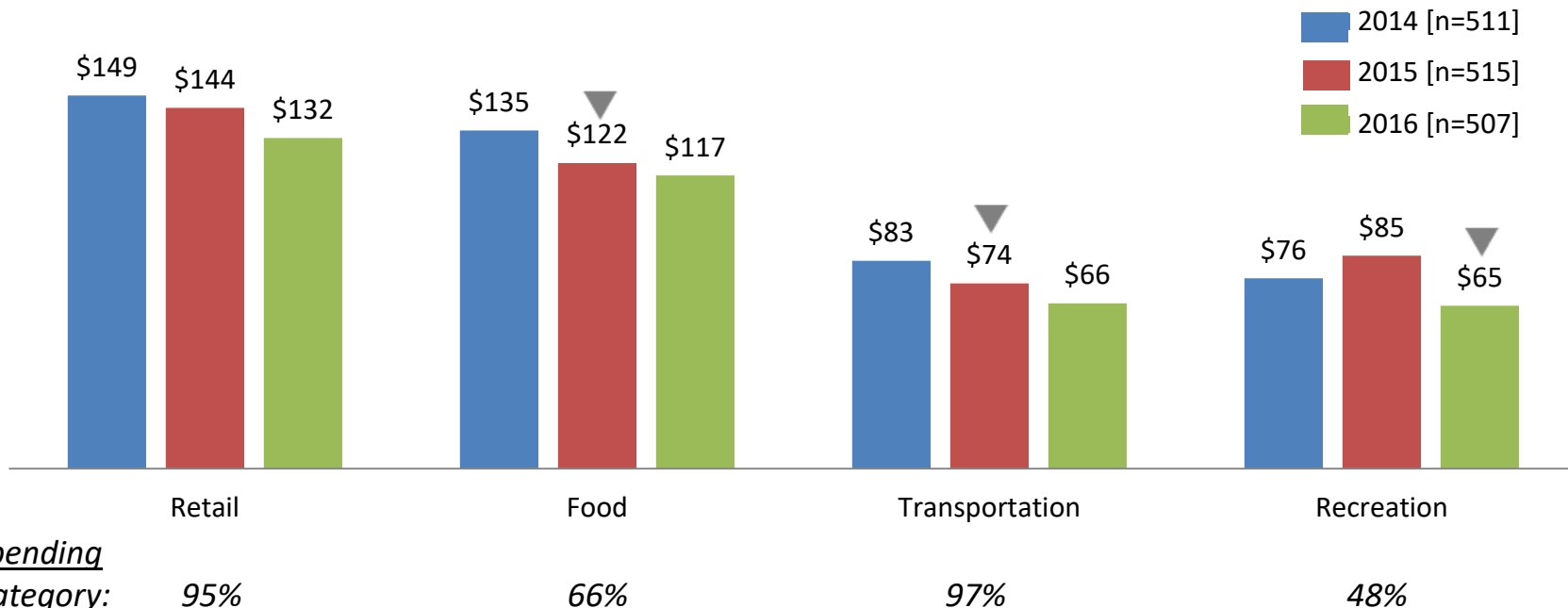
**Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category. This differs from previous seasons, where the average amount spent was based on all travelers, including those who did not spend money in the category. Expenditure data presented here will not match reports generated in prior seasons.*

Overnight Q35. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

▲ ▼ notes significant difference between years at the 95% confidence level

Day visitors spent the most on *retail* and *food* expenditures while in Maine.

Average Trip Spending per Travel Party – Day Visitors* (Base = Visitors Who Spent Anything in the Category)



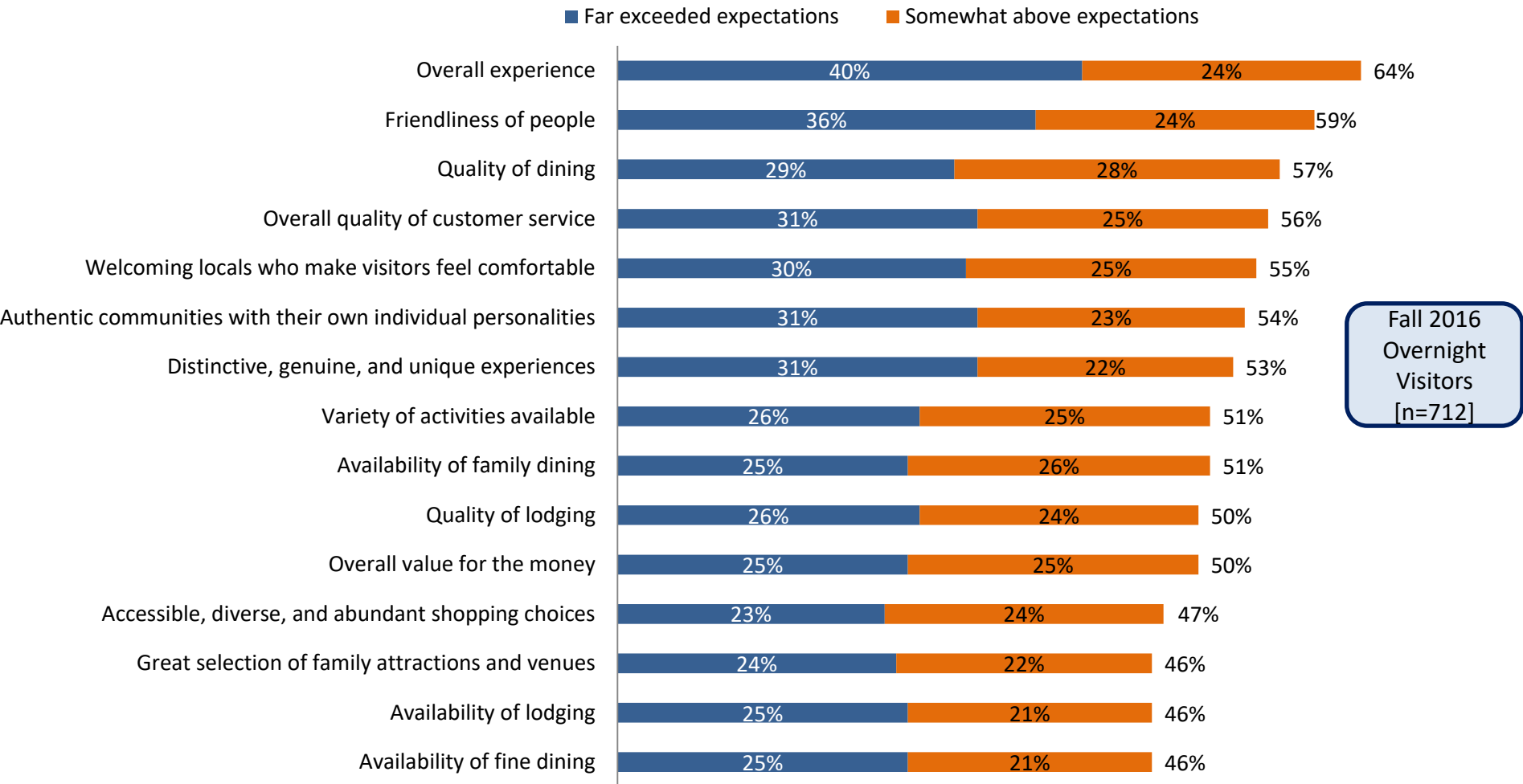
*Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category. This differs from previous seasons, where the average amount spent was based on all travelers, including those who did not spend money in the category. Expenditure data presented here will not match reports generated in prior seasons.

Day Q27. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

▲▼ notes significant difference between years at the 95% confidence level

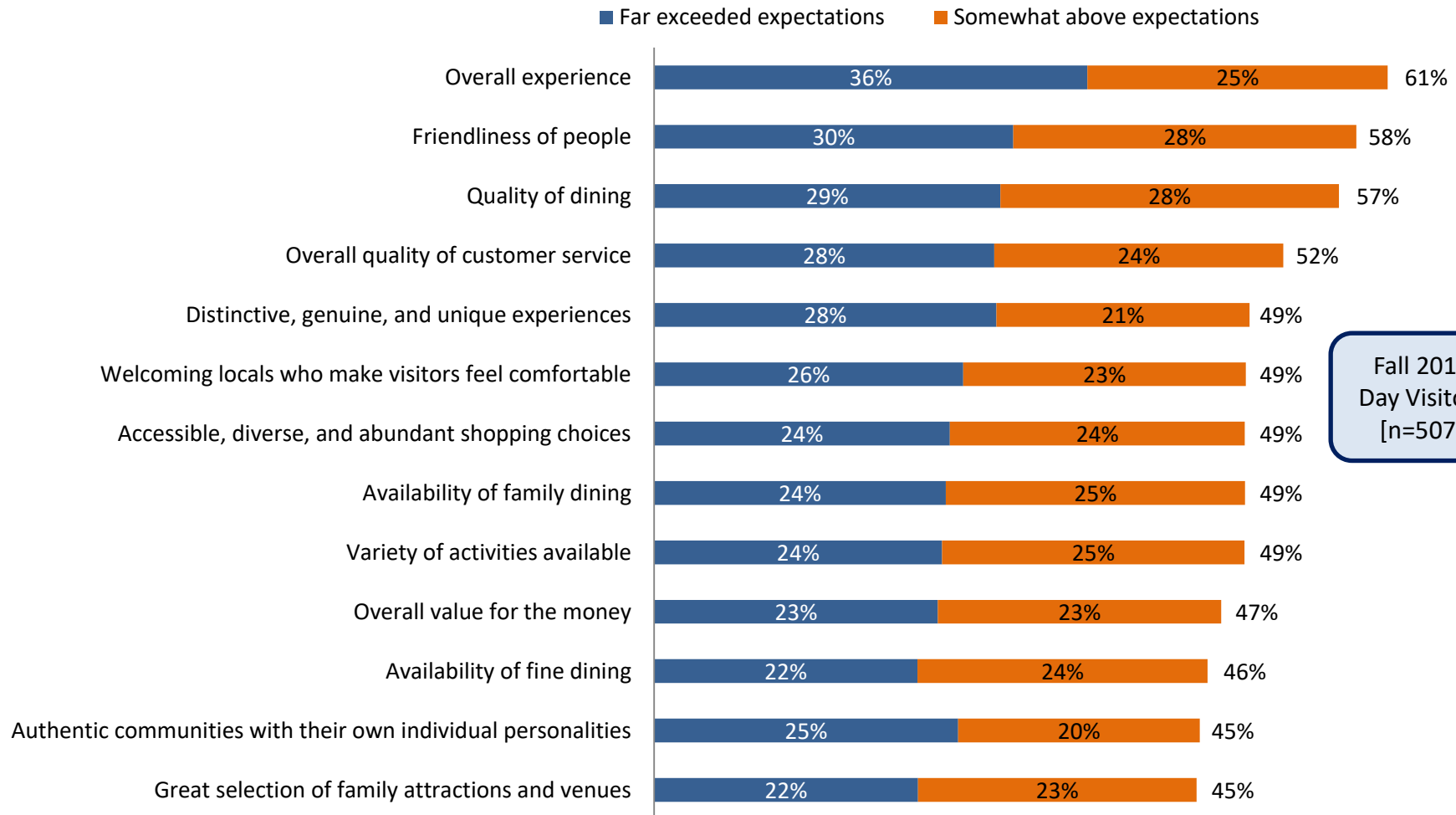
Trip Evaluation

Many aspects of visits to Maine exceed visitor expectations, with the *overall experience* being the top rated item.



Overnight Q38: 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.

Day visitors are also most impressed by the *overall experience* of their visit to Maine, followed closely by the *friendliness of the people*.

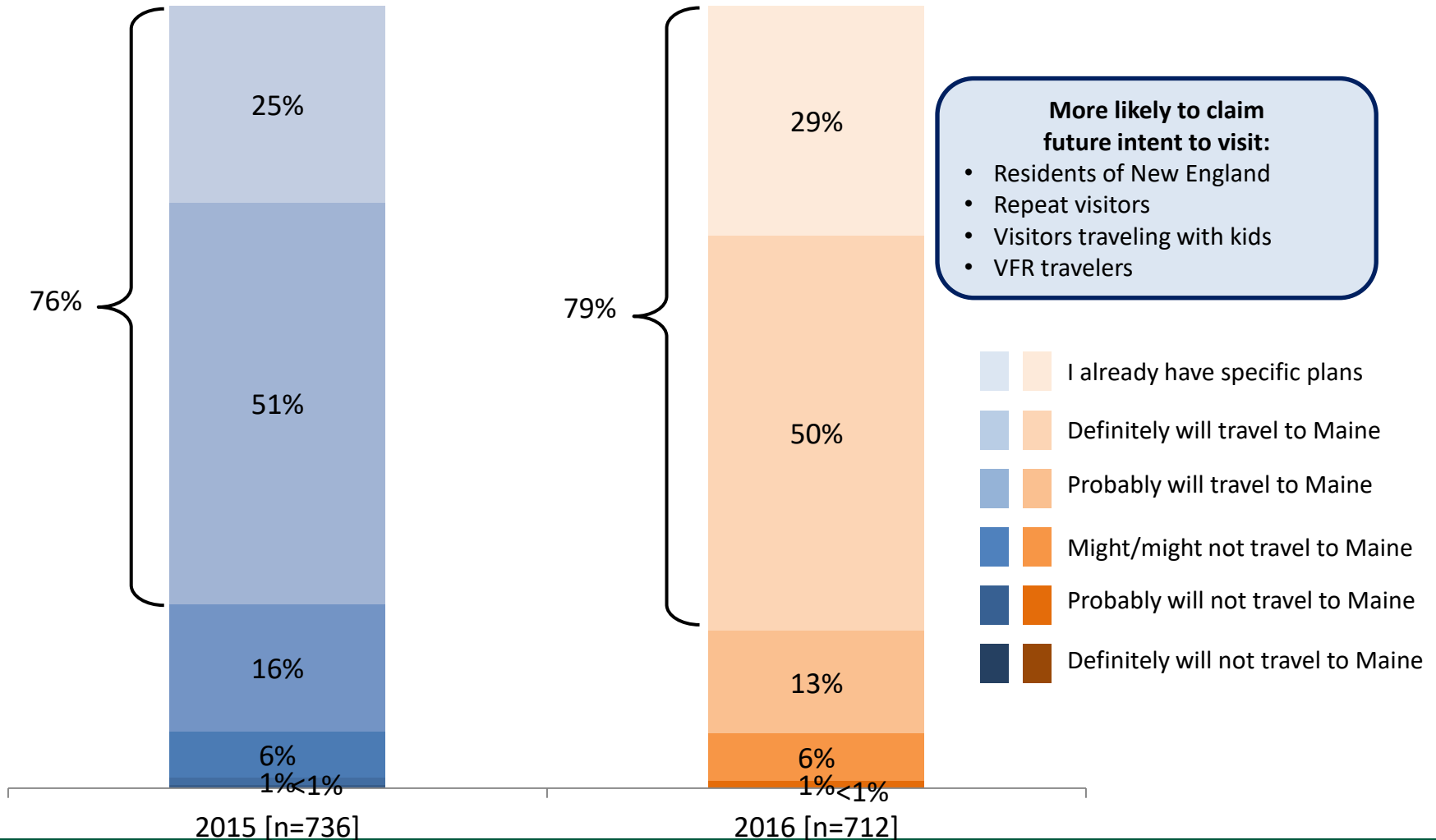


Day Q28: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

Future Travel

Four in five overnight Fall visitors plan to visit Maine again in the next two years.

Likelihood of Trip to Maine in Next Two Years

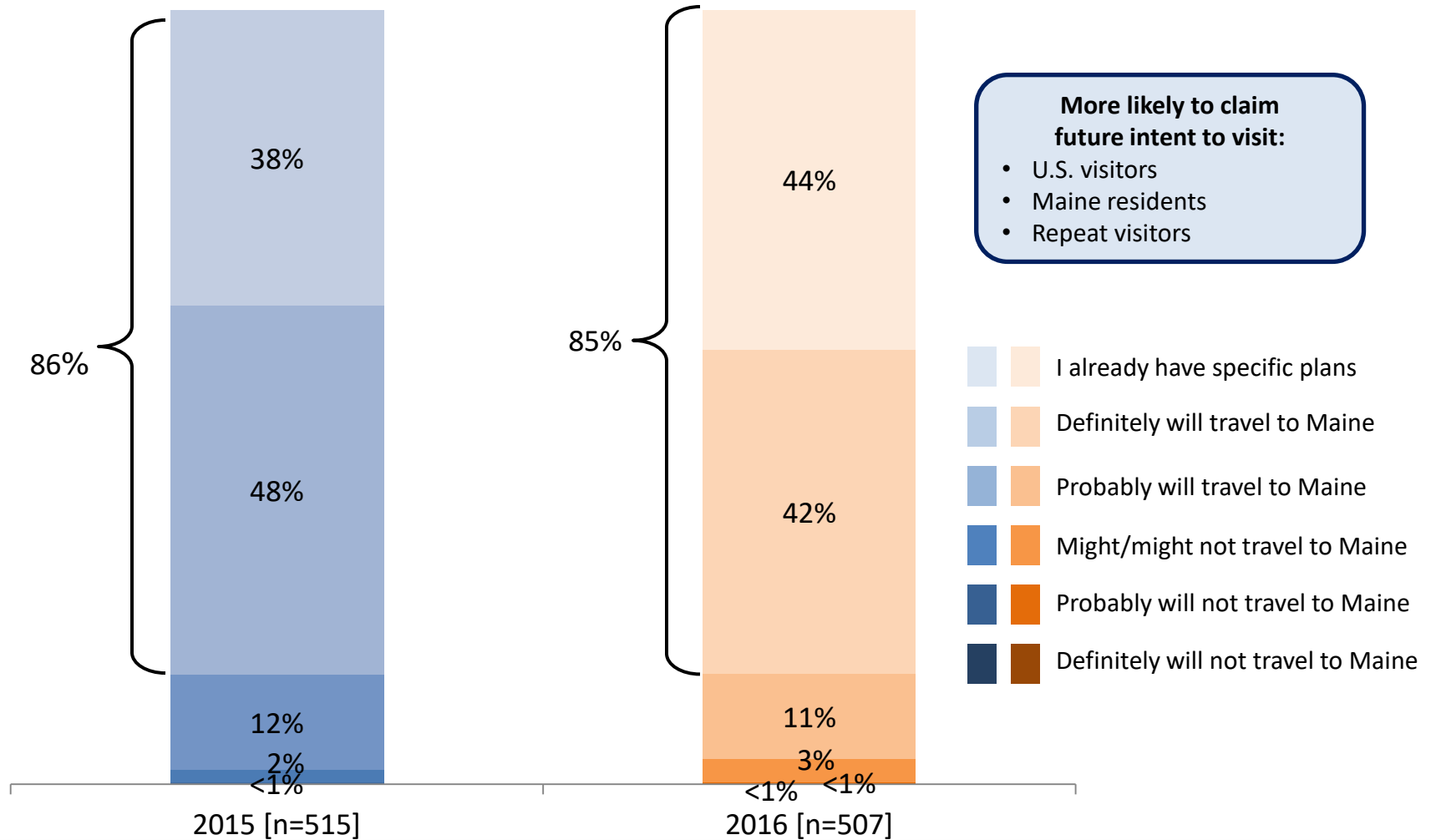


Overnight Q41. How likely will you be to travel in Maine in the next two years?

▲▼ notes significant difference between years at the 95% confidence level

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

Likelihood of Trip to Maine in Next Two Years

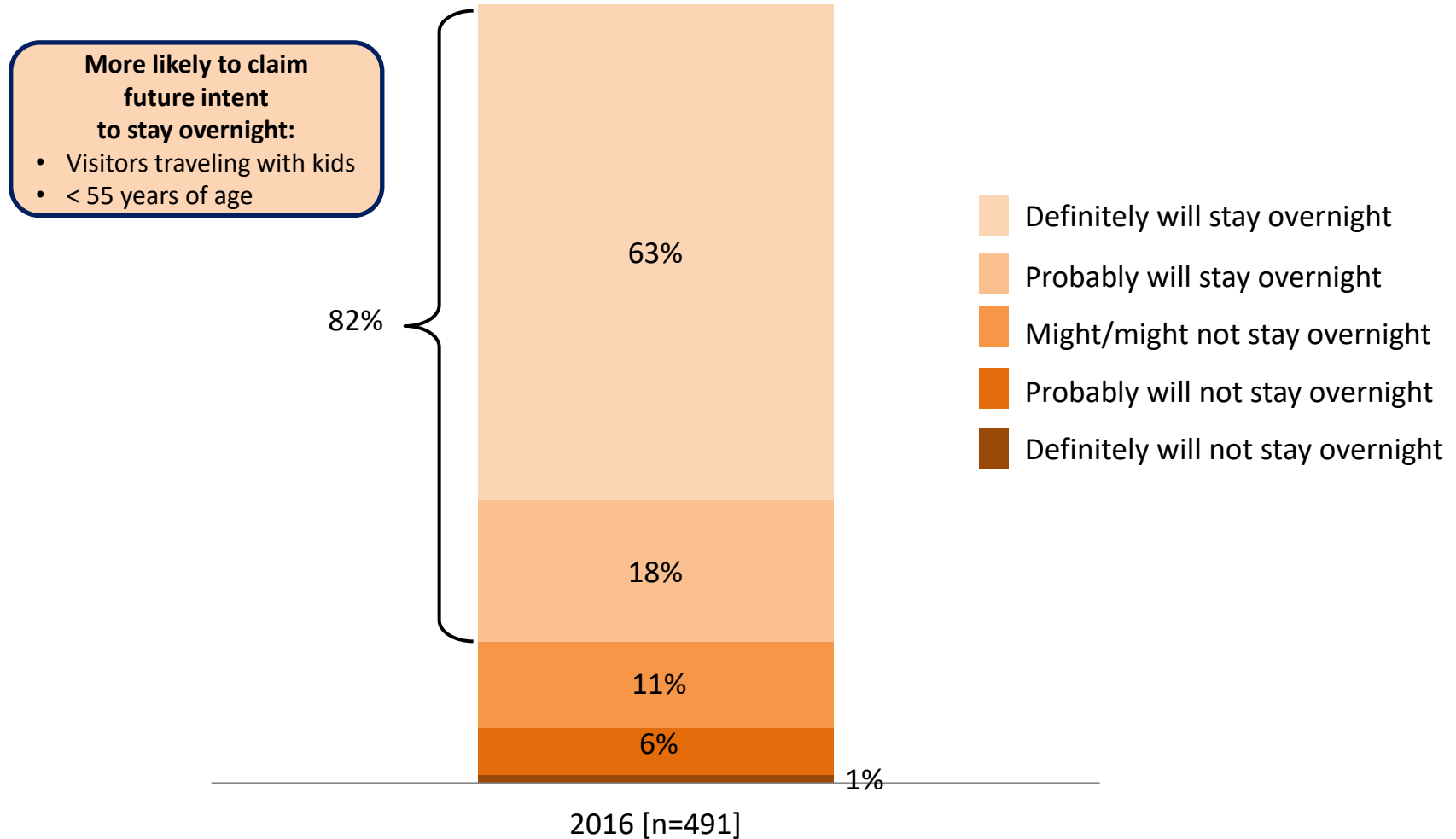


Day Q31. How likely will you be to travel in Maine in the next two years?

▲▼ notes significant difference between years at the 95% confidence level

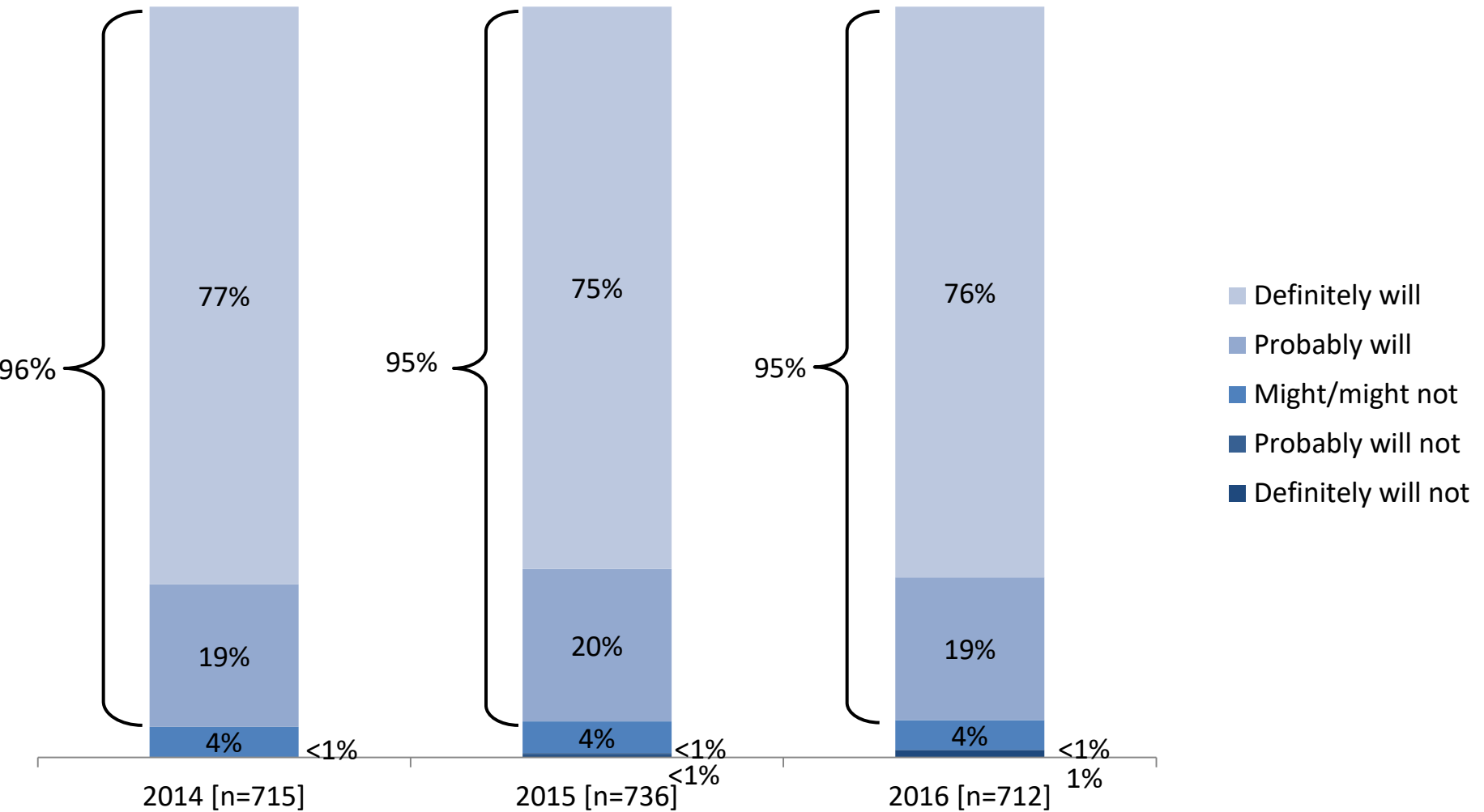
Among day visitors who are likely to visit Maine again in the next two years, four in five say they *definitely or probably will stay overnight* when they visit.

Likelihood of Staying Overnight in Maine in Next Two Years
(Base=Day Visitors Likely to Visit Maine in Next Two Years)



Day Q32. Assuming you travel in Maine again in the next two years, how likely are you to stay overnight in Maine on one or more of these trips?

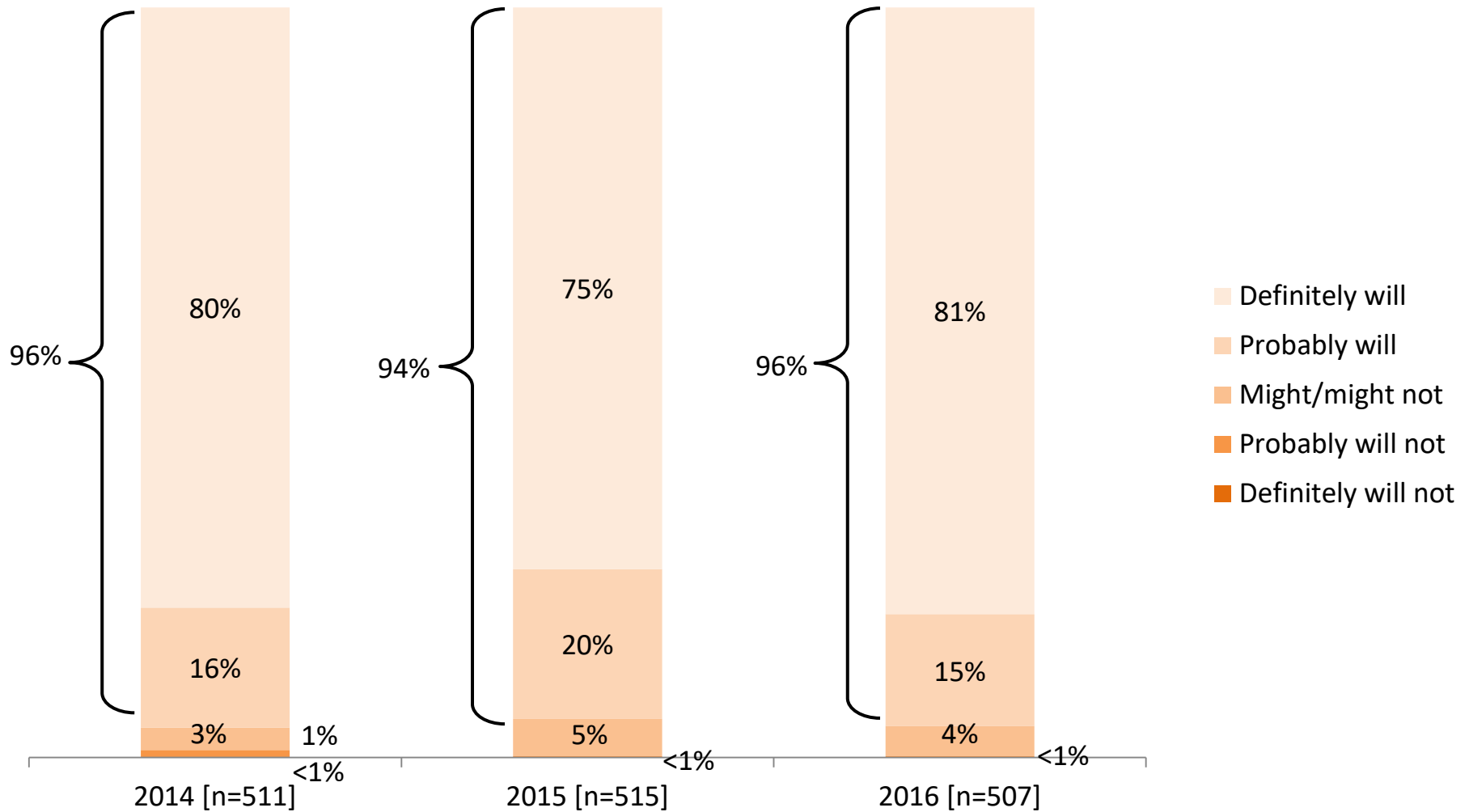
Overnight visitors' enjoyment of their vacation in Maine is echoed in their intent to recommend Maine as a vacation destination.



Overnight Q42: How likely are you to recommend Maine as a vacation destination to friends or relatives?

▲ ▼ notes significant difference between years 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 Q33: 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

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.
- As such, DPA added the questions required as inputs for the segment typing tool into the Visitor Profile questionnaire and began collecting this supplemental data as of January 2015. The intent is to use this typing tool to categorize Maine's visitors into the various segments developed to compare the perceptions, travel behaviors, and future travel intentions of visitors within the segments.

Visitor Segment Analysis: Background

- Five consumer segments were defined as a result of the market segmentation research:
 - **Balanced Achievers**
 - **Genuine Originals**
 - **Social Sophisticates**
 - **Obligated Traditionalists**
 - **Comfortable Pragmatists**
- Of these five segments, three are considered high priority segments for the Maine Office of Tourism: **Balanced Achievers**, **Genuine Originals**, and **Social Sophisticates**.
- This Appendix provides a topline profile and comparison of these priority segments as they relate to Maine's Fall visitors.
- ***Important Note:*** *Sample sizes are relatively low in this seasonal analysis for the **Social Sophisticates** segment. Please use caution in interpreting the findings for this segment.* At the completion of the 2016 research, an in-depth segmentation analysis will be completed for the entire year, at which time sample sizes will be sufficient to draw conclusions for all visitor segments.

Visitor Segment Analysis: Key Findings

Balanced Achievers:

- Most likely from Ontario (overnight)
- Least likely from MA (overnight)
- Most likely to visit the *Maine Highlands* and *Aroostook County*
- Spend more on *retail goods* and *recreation* than do Genuine Originals (day visitors)

Genuine Originals:

- Among the oldest
- Most likely from Maine (day visitors)
- Most likely to visit *Mid-Coast*

Social Sophisticates:

- Smallest % of visitors
- Most likely from Massachusetts (day visitors)
- Most likely to visit *Maine Beaches*

Two-thirds of Fall 2016 visitors are categorized as either *Balanced Achievers* or *Genuine Originals*.

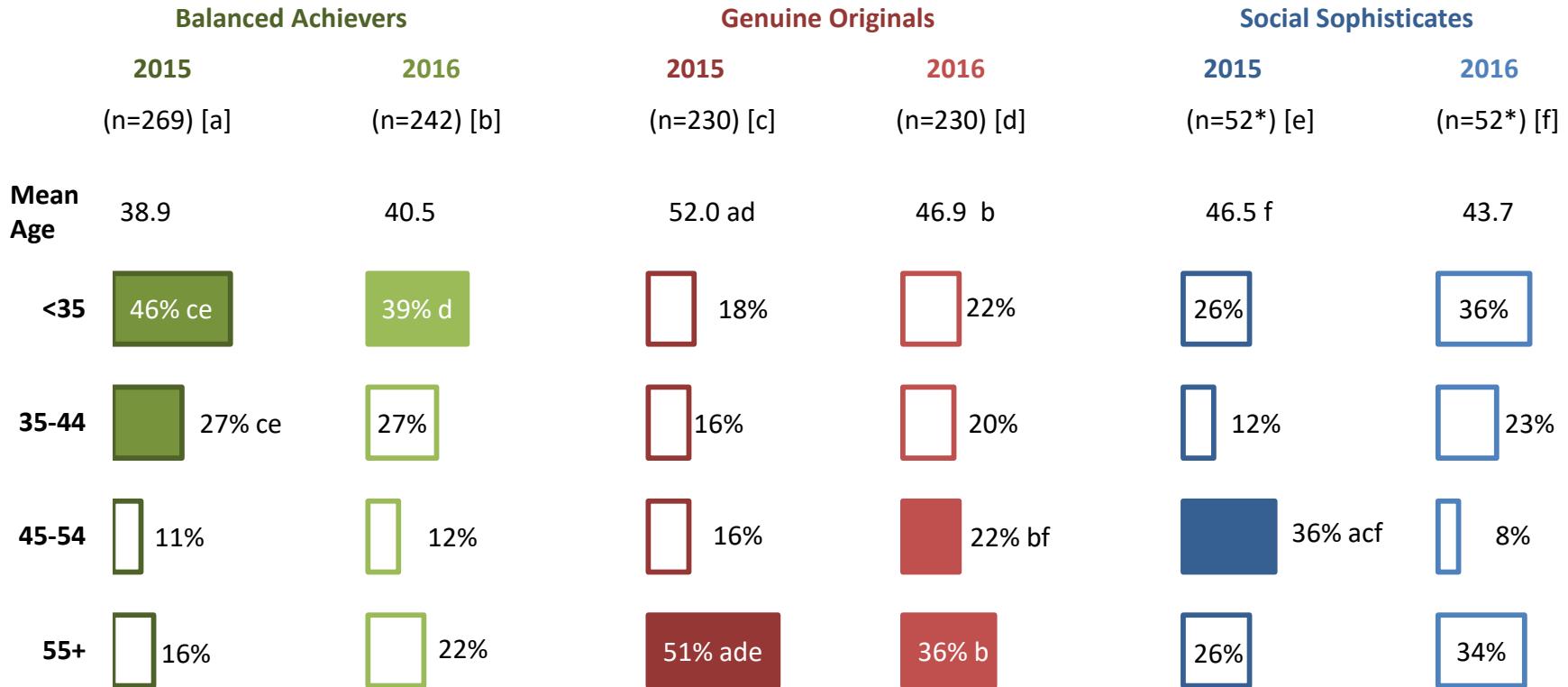
- *Social Sophisticates* make up a significantly smaller proportion of visitors to Maine during the Fall season.

Fall Visitor Segments

	Fall Overnight Visitors		Fall Day Visitors	
	2015 (n=736)	2016 (n=712)	2015 (n=515)	2016 (n=507)
Balanced Achievers	37%	34%	26%	25%
Genuine Originals	31%	32%	36%	39%
Social Sophisticates	7%	7%	9%	5%

Overnight visitors categorized as *Genuine Originals* trend a bit older than *Balanced Achievers*.

Age of Fall Overnight Visitors by Visitor Segment



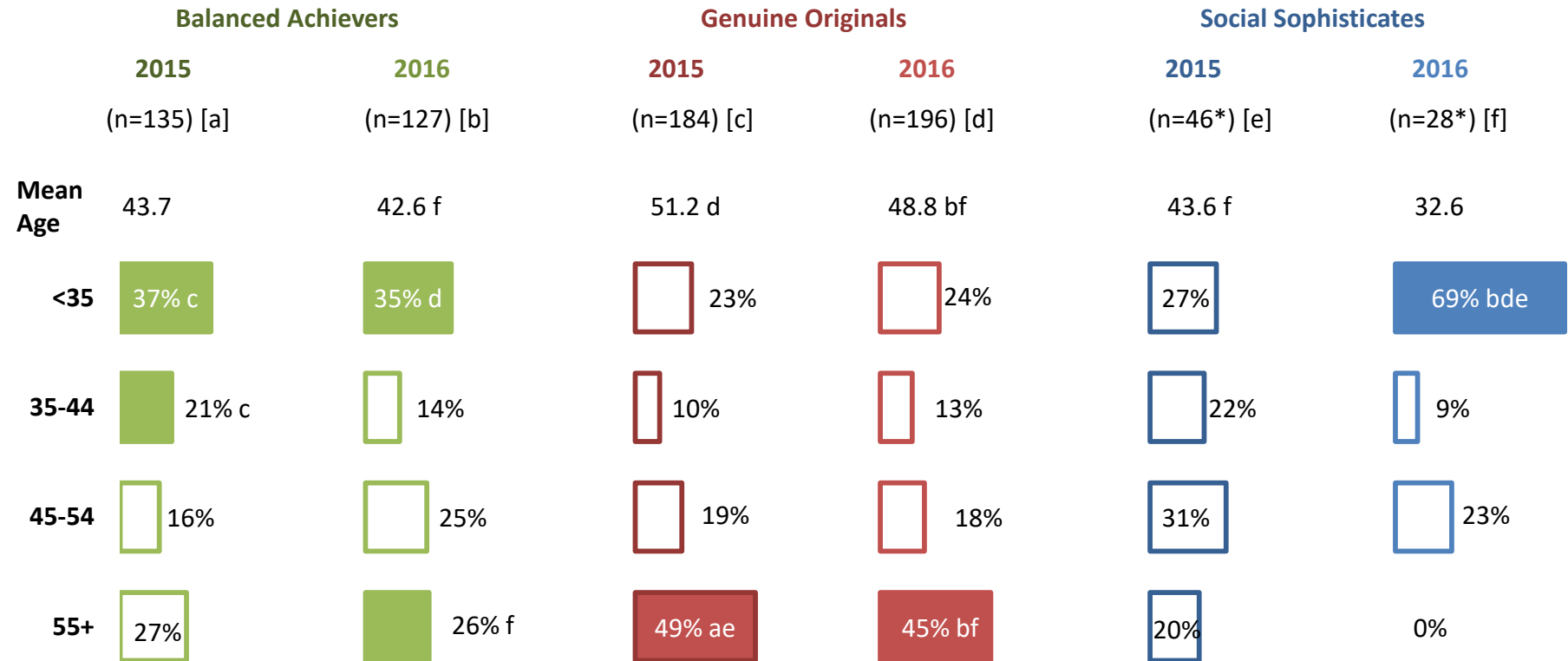
Overnight/Day Q1. How old are you?

*Please note small sample size.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Among day visitors, *Genuine Originals* trend older than both *Balanced Achievers* and *Social Sophisticates*.

Age of Fall Day Visitors by Visitor Segment



Overnight/Day Q1. How old are you?

* Please note small sample size.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Overnight visitors categorized as *Balanced Achievers* were more likely to be from Ontario than those categorized in other visitor segments and least likely to be from Massachusetts.

State/Province of Origin by Visitor Segment: Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=269) [a]	2016 (n=242) [b]	2015 (n=230) [c]	2016 (n=230) [d]	2015 (n=52*) [e]	2016 (n=52*) [f]
United States (NET)	89%	82%	92%	89% b	87%	85%
New England (NET)	31%	47% a	57%	61% b	44%	57%
Massachusetts	15%	21% a	25%	29% b	21%	36% b
Maine	4%	13% a	17%	12%	10%	9%
New Hampshire	4%	4%	3%	9% bc	4%	--
Connecticut	6%	5%	7%	6%	8%	9%
Rhode Island	2%	3%	2%	2%	--	2%
Vermont	1%	1%	3%	2%	--	1%
Mid-Atlantic (NET)	57% b	34%	35%	28%	43%	28%
New York	21%	16%	18%	12%	19%	21%
New Jersey	14%	8%	5%	5%	3%	--
Pennsylvania	14% b	7%	9%	8%	9%	5%
Maryland	8% b	2%	1%	2%	11% f	1%
Delaware	--	--	1%	--	--	--
Canada (NET)	11%	18% d	8%	11%	13%	15%
Ontario	6%	11% df	4%	5%	6%	3%
Quebec	2%	3%	1%	1%	4%	4%
New Brunswick	2%	2%	2%	3%	3%	6%

State/Province of Residence

*Please note small sample size.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

The proportion of *Genuine Original* day visitors arriving from domestic markets is higher than in 2015, while the proportion arriving from Canada is lower.

- Social Sophisticates* are more likely than other day visitors to be from Massachusetts, while *Genuine Originals* are more likely to be from Maine.

State/Province of Origin by Visitor Segment: Day Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=135) [a]	2016 (n=127) [b]	2015 (n=184) [c]	2016 (n=196) [d]	2015 (n=46*) [e]	2016 (n=28*) [f]
United States (NET)	80%	84%	87%	96% bc	82%	92%
Massachusetts	39%	34%	36%	41%	48%	63% bd
Maine	24%	29%	32%	40% bf	17%	15%
New Hampshire	14%	19%	15%	13%	17%	12%
Rhode Island	2%	2%	2%	1%	--	2%
Vermont	--	<1%	2%	1%	--	--
Canada (NET)	20%	16% d	13% d	4%	18%	8%
Quebec	14%	7% d	7%	2%	10%	3%
New Brunswick	6%	8% d	6%	2%	8%	5%

Q2. State/Province of Residence

* Please note small sample size.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Overnight regional visitation patterns differ somewhat by visitor segments.

- Visitors categorized as *Balanced Achievers* are more likely to visit the Maine Highlands region and Aroostook County, as compared to those categorized as *Genuine Originals* or *Social Sophisticates*.
- *Genuine Originals* are more likely to visit the Mid-Coast, and *Social Sophisticates* are more likely to visit the Maine Beaches region.

Primary Regional Destination of Overnight Visitors By Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=269) [a]	2016 (n=242) [b]	2015 (n=230) [c]	2016 (n=230) [d]	2015 (n=52*) [e]	2016 (n=52*) [f]
Maine Beaches	20%	22%	26%	18%	35% a	48% bd
Maine Highlands	19% ce	26% df	7%	17% c	5%	12%
Mid-Coast	10%	9%	15%	17% bf	19%	8%
Downeast & Acadia	17%	10%	16%	14%	19%	13%
Greater Portland/Casco Bay	8%	8%	21% ade	13%	8%	8%
Maine Lakes & Mountains	14% bc	6%	6%	12% b	8%	10%
Kennebec Valley	6%	8%	6%	6%	6%	--
Aroostook County	5% e	10% df	3%	3%	1%	1%

Overnight Q25. What region in Maine was your primary destination?

* Please note small sample size.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.

Fall day visitors show limited differences in the regions visited based on their visitor segment categorization.

- Visitors categorized as *Social Sophisticates* are the least likely to visit the Downeast & Acadia region.

Primary Regional Destination of Day Visitors By Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=135) [a]	2016 (n=127) [b]	2015 (n=184) [c]	2016 (n=196) [d]	2015 (n=46*) [e]	2016 (n=28*) [f]
Maine Beaches	28%	22%	28%	28%	58% ac	38%
Mid-Coast	11%	20%	18% e	14%	5%	14%
Greater Portland/Casco Bay	13%	9%	13%	17% b	14%	13%
Maine Lakes & Mountains	9% e	12%	6%	12%	2%	20% e
Downeast & Acadia	15% e	13% f	13% e	11% f	3%	1%
Kennebec Valley	8%	7%	6%	9%	2%	--
Maine Highlands	11%	6%	8%	3%	11%	9%
Aroostook County	5%	9% d	6%	3%	3%	5%

Overnight Q25. What region in Maine was your primary destination?

* Please note small sample size.

a/b/c, etc. indicate a significant difference between subgroups at the 95% confidence level.



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