

Maine Office of Tourism Visitor Tracking Research Summer 2016 Seasonal Topline: *Visitor Segment Addendum*



Prepared by



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Visitor Segment Analysis - Background

- During 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 visitors from the ongoing research into the various segments developed to compare the perceptions, travel behaviors, and future travel intentions of visitors within the segments.
- This Visitor Segment Analysis serves as an addendum to the Summer 2016 Seasonal Topline that was completed in October 2016. In this addendum, Maine summer visitors are profiled by the consumer segments into which they fall, based on the Consumer Segmentation Study completed in 2014. Overnight and day visitors are presented separately, as in the Summer 2016 Seasonal Topline.

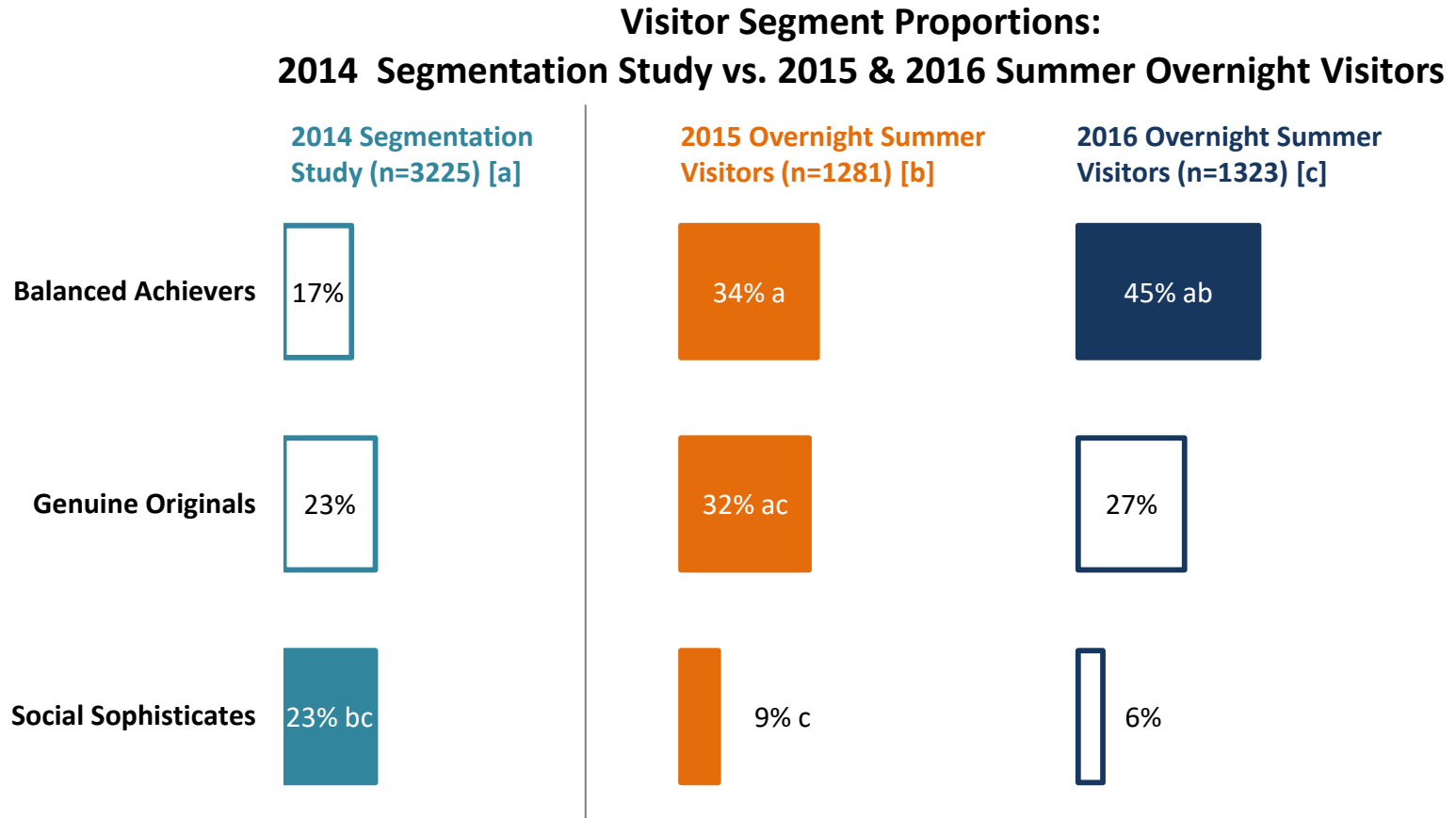
Visitor Segment Analysis - Background

- 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**.
- The analysis shown on the following pages highlights only these three priority segments.
- ***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 year-end 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.

Overnight Visitors

Eight in ten Maine summer overnight visitors in 2016 fall into Maine's three priority segments: *Balanced Achievers*, *Genuine Originals*, or *Social Sophisticates*.

- A higher proportion of 2016 summer overnight visitors fall into the *Balanced Achievers* segment compared to 2015 and a lower proportion into *Genuine Originals*.



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

Genuine Original summer overnight visitors are older on average compared to other visitor segments.

Age of Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015	2016	2015	2016	2015	2016
	(n=439) [a]	(n=601) [b]	(n=413) [c]	(n=354) [d]	(n=120) [e]	(n=82) [f]
Mean Age	39.2	40.9 a	49.8 d	47.4 bf	48.0 f	41.0
<35	42%	36% d	21%	23%	27%	43% d
35-44	27%	26%	17%	21%	8%	18%
45-54	18%	18%	19%	18%	31% f	17%
55+	13%	20% a	43%	38% bf	34%	21%

Q1. How old are you?

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

Balanced Achievers are more likely to be from the Mid-Atlantic region compared to other segments.

State/Province of Origin: Overnight Visitors

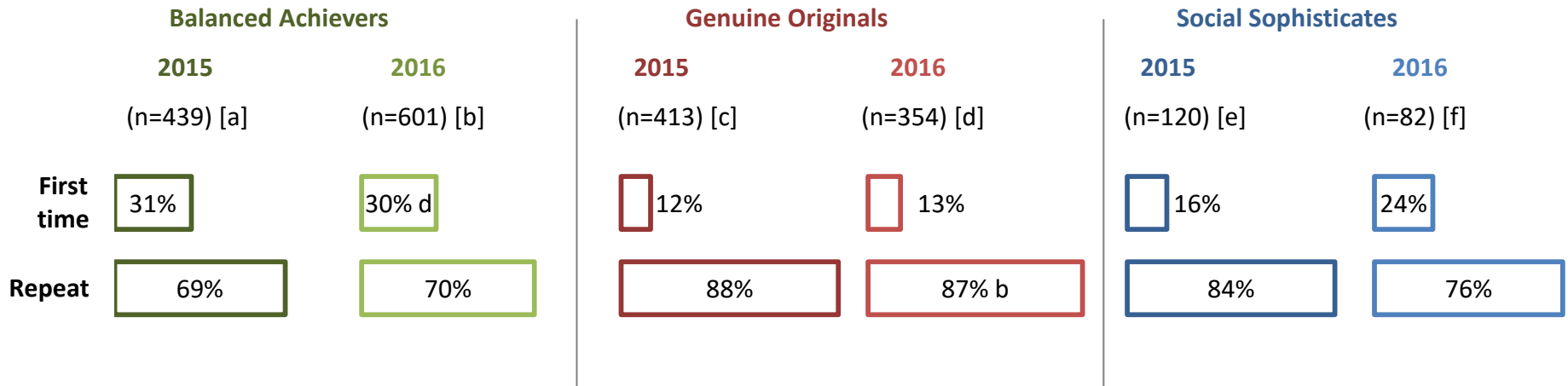
	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=439) [a]	2016 (n=601) [b]	2015 (n=413) [c]	2016 (n=354) [d]	2015 (n=120) [e]	2016 (n=82) [f]
United States (NET)	89%	86%	88%	90%	89%	85%
New England (NET)	34% b	30%	58% d	48% b	58% f	40%
Massachusetts	14%	18%	26%	24%	39%	28%
Maine	6% b	2%	12% d	3%	8%	2%
New Hampshire	4% b	1%	6%	8% b	2%	1%
Connecticut	6%	5%	6%	7%	7%	8%
Rhode Island	3%	3%	4%	3%	2%	0%
Vermont	<1%	1%	3%	3%	0%	1%
Mid-Atlantic (NET)	55%	56% d	30%	43% c	31%	45%
New York	26%	23% d	11%	16%	16%	18%
New Jersey	11%	13% d	9%	8%	10%	8%
Pennsylvania	11%	15%	7%	12%	2%	13% e
Maryland	6%	4%	2%	5%	3%	5%
Delaware	1%	1%	<1%	2%	0%	0%
Canada (NET)	11%	14%	12%	10%	11%	15%
Ontario	5%	7%	5%	6%	3%	6%
Quebec	3%	4% d	3%	1%	3%	6%
New Brunswick	2%	1%	3%	1%	3%	3%

Q2. State/Province of Residence

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

Balanced Achiever summer overnight visitors in 2016 are more likely to be first-timers than are **Genuine Original** visitors.

First time vs. Repeat Overnight Visitors



Q11. Was this your first visit to Maine?

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

Balanced Achievers are the least likely segment to have stayed in paid accommodations while visiting Maine in summer 2016.

Type of Accommodations: Overnight Visitors by Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=439) [a]	2016 (n=601) [b]	2015 (n=413) [c]	2016 (n=354) [d]	2015 (n=120) [e]	2016 (n=82) [f]
Accommodations						
Paid	76% b	64%	71%	71% b	82%	77% b
Unpaid	24%	36% df	29%	29%	18%	23%
Average Nights/Stay	3.8	3.8 f	3.4	3.5	3.2	3.0
Paid Accommodation Type						
Hotel/Motel/Resort	58% b	45%	47%	47%	63%	52%
Inn/B&B	9%	11%	10%	13%	10%	16%
Rented Cabin/ Cottage/Condo	6%	6%	6%	5%	6%	9%
RV Park/ Campground	3%	2%	5%	4%	1%	0%
Sporting camp or wilderness lodge	0%	<1%	1%	0%	0%	0%
Other	1%	1%	2%	1%	3%	0%

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

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

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

The majority of summer overnight visitors in the target segments rate Maine as having exceeded their expectations in the various categories listed.

Expectation Ratings of Recent Trip to Maine: Overnight Visitors by Segment

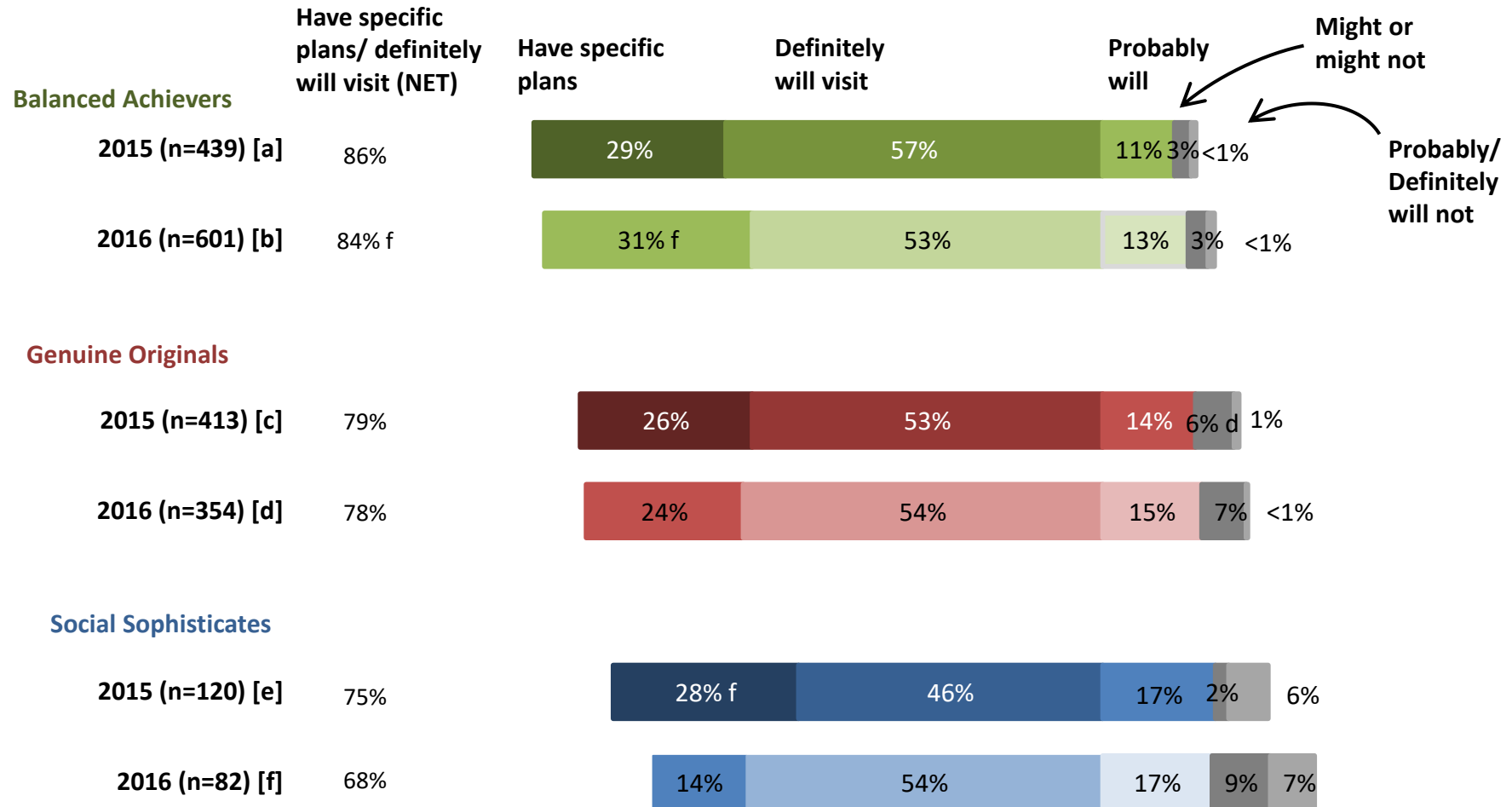
Top 2 Box: Somewhat Above/Far Exceeded My Expectations	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=439) [a]	2016 (n=601) [b]	2015 (n=413) [c]	2016 (n=354) [d]	2015 (n=120) [e]	2016 (n=82) [f]
Overall experience	80% b	74%	71%	81% c	75%	73%
Friendliness of people	77%	72%	61%	70% c	63%	58%
Welcoming locals who make visitors feel comfortable	75%	71% f	55%	63%	64% f	54%
Overall quality of customer service	74%	69%	57%	66%	59%	59%
Distinctive, genuine, and unique experiences	74%	68%	55%	66% c	53%	57%
Quality of dining	73%	72%	56%	68% c	62%	60%
Variety of activities available	72%	68% f	53%	62% c	47%	51%
Authentic communities with their own individual personalities	72%	67% f	53%	62% c	57%	53%
Great selection of family attractions and venues	71%	67% df	44%	53%	40%	51%
Availability of lodging	71% b	63% f	41%	57% c	50%	45%
Overall value for the money	70%	66% f	47%	58% c	58%	49%
Availability of family dining	70%	66% d	39%	51% c	46%	63%
Accessible, diverse, and abundant shopping choices	70%	66% df	42%	55% c	56%	49%
Quality of lodging	69%	65%	45%	57% c	50%	54%
Availability of fine dining	69%	64% df	44%	48%	54%	46%

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.

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

Balanced Achievers show a higher intent to visit Maine again in the next two years than do *Social Sophisticates*.

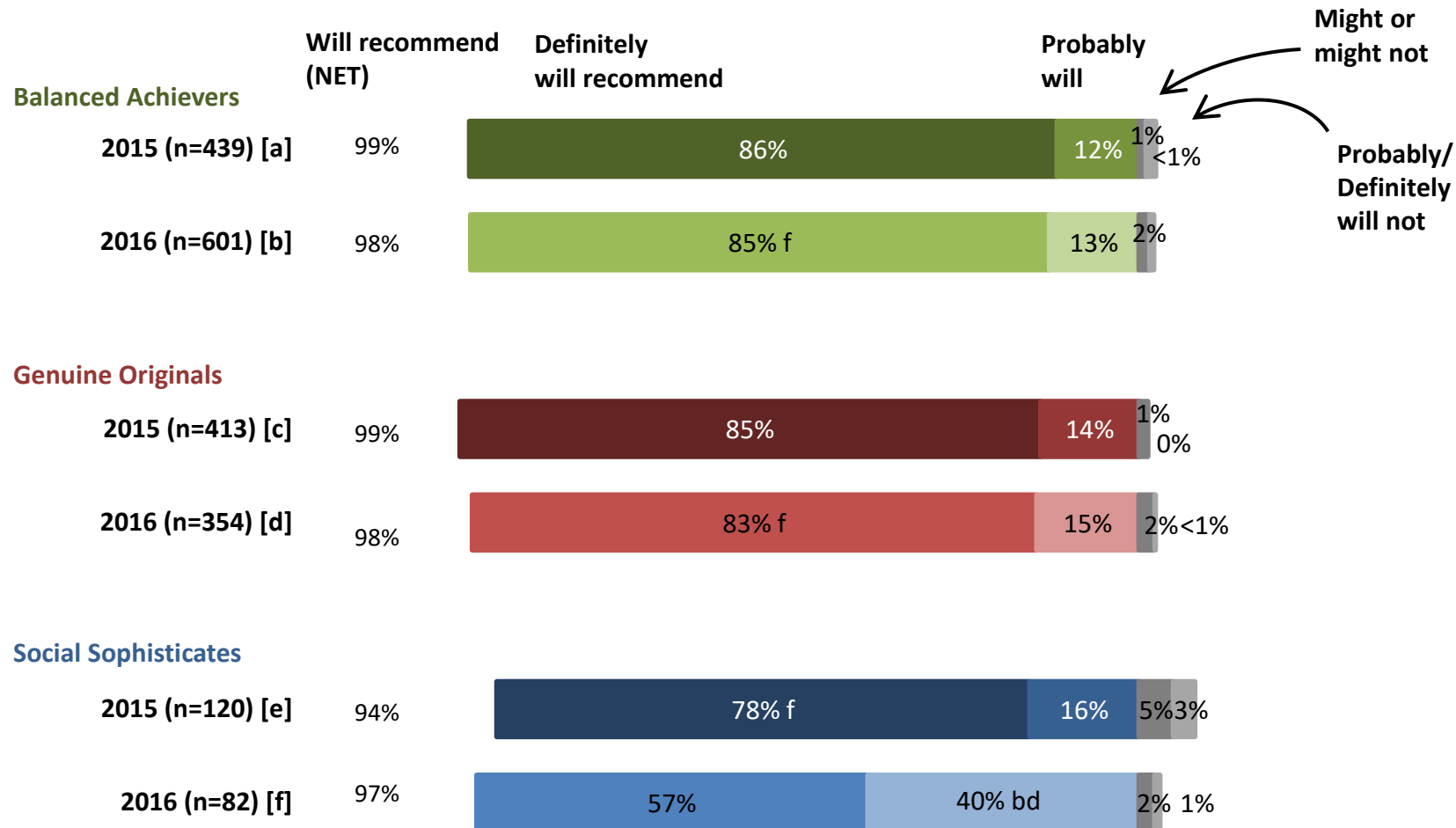
Likelihood of Returning to Maine: Overnight Visitors



Q41. How likely will you be to travel in Maine in the next two years?
 a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.

Nearly all 2016 summer overnight visitors in the target segments say they will *definitely or probably recommend* Maine as a vacation destination.

Likelihood of Recommending Maine: Overnight Visitors

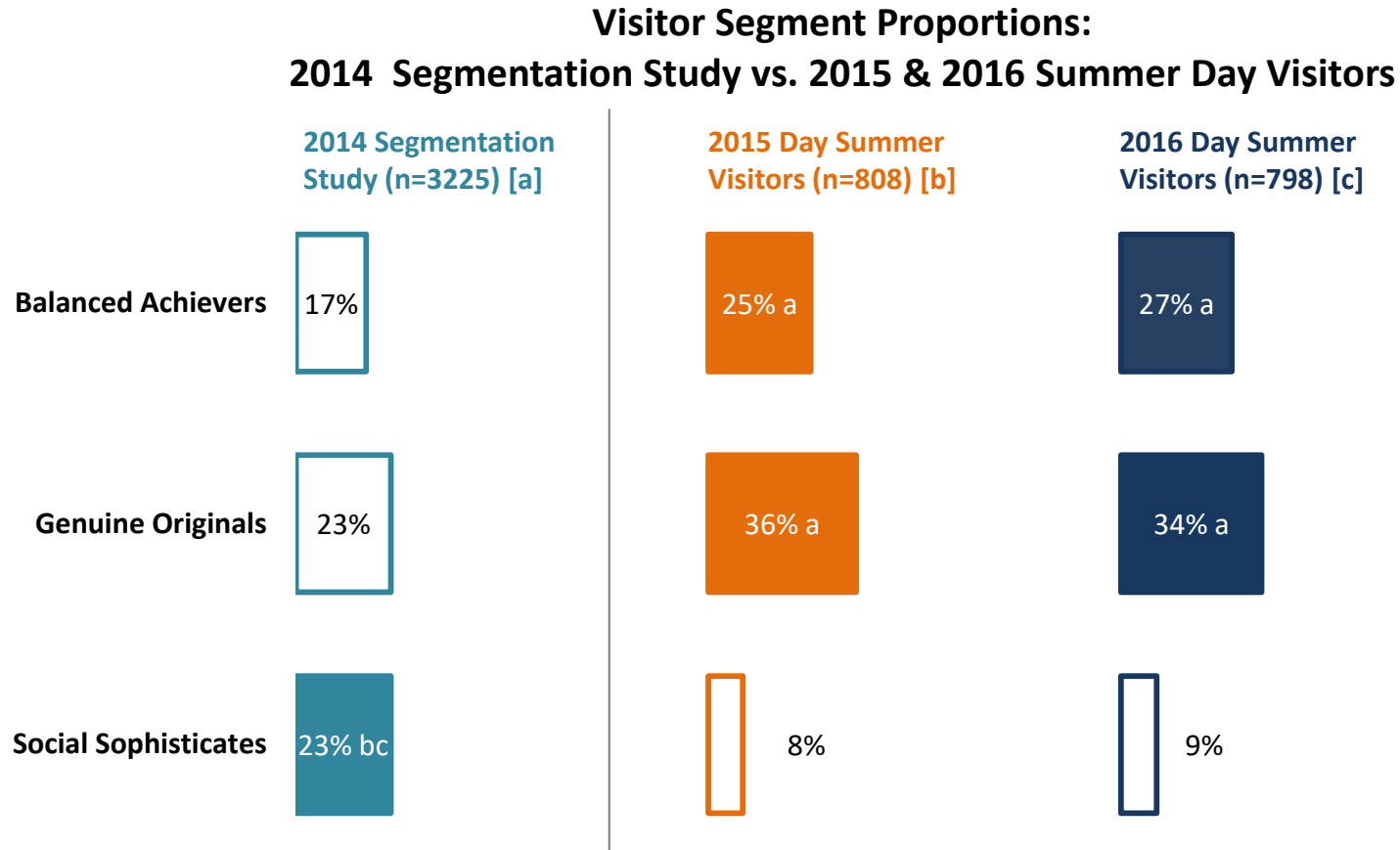


Q42. How likely are you to recommend Maine as a vacation destination to friends or relatives?
a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
**Please note small sample size. Use caution in interpretation of findings.*

Day Visitors

Seven out of ten summer day visitors fall into Maine’s three target segments this year: *Balanced Achievers*, *Genuine Originals*, and *Social Sophisticates*.

- The proportion of day visitors in each of the target segments is about the same in 2016 as compared to the previous year.



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

On average, *Social Sophisticate* summer day visitors are younger than *Balanced Achievers* or *Genuine Originals*.

Age of Day Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=200) [a]	2016 (n=214) [b]	2015 (n=289) [c]	2016 (n=272) [d]	2015 (n=67) [e]	2016 (n=69) [f]
Mean Age	40.2	43.4af	51.2	48.5 bf	40.5	36.2
<35	42% b	27%	18%	25%	41%	50% bd
35-44	22%	24% d	11%	11%	25%	27% d
45-54	20%	28% df	25%	18%	15%	14%
55+	17%	21% f	46%	47% bf	19%	10%

Q1. How old are you?

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

*Please note small sample size. Use caution in interpretation of findings.

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

State/Province of Origin: Day Visitors

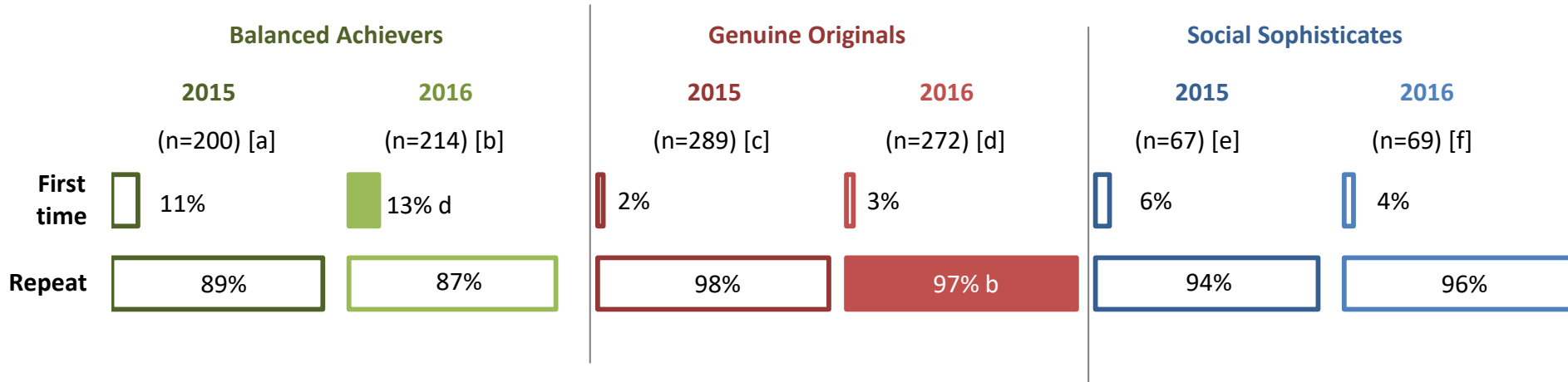
	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=200) [a]	2016 (n=214) [b]	2015 (n=289) [c]	2016 (n=272) [d]	2015 (n=67) [e]	2016 (n=69) [f]
United States (NET)	87% b	79%	93%	91% bf	90%	79%
Massachusetts	51% b	41%	39%	44%	57%	47%
Maine	22%	22%	37% d	27% f	22%	14%
New Hampshire	11%	12%	15%	17%	9%	14%
Rhode Island	2%	1%	0%	1%	1%	3%
Vermont	1%	3%	3%	1%	2%	1%
Canada (NET)	13%	21% ad	7%	9%	10%	21% d
Quebec	6%	15% ad	2%	3%	7%	9%
New Brunswick	6%	4%	4%	5%	3%	11%

Q2. State/Province of Residence

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

Similar to overnight visitors, *Balanced Achiever* day visitors are much more likely to be visiting Maine for the first time than are *Genuine Originals*.

First time vs. Repeat Day Visitors



Q10. Was this your first visit to Maine?

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

Balanced Achiever day visitors in 2016 have a higher propensity to report that their most recent trip to Maine exceeded expectations than do other segments on many aspects.

Expectation Ratings of Recent Trip to Maine: Day Visitors by Segment

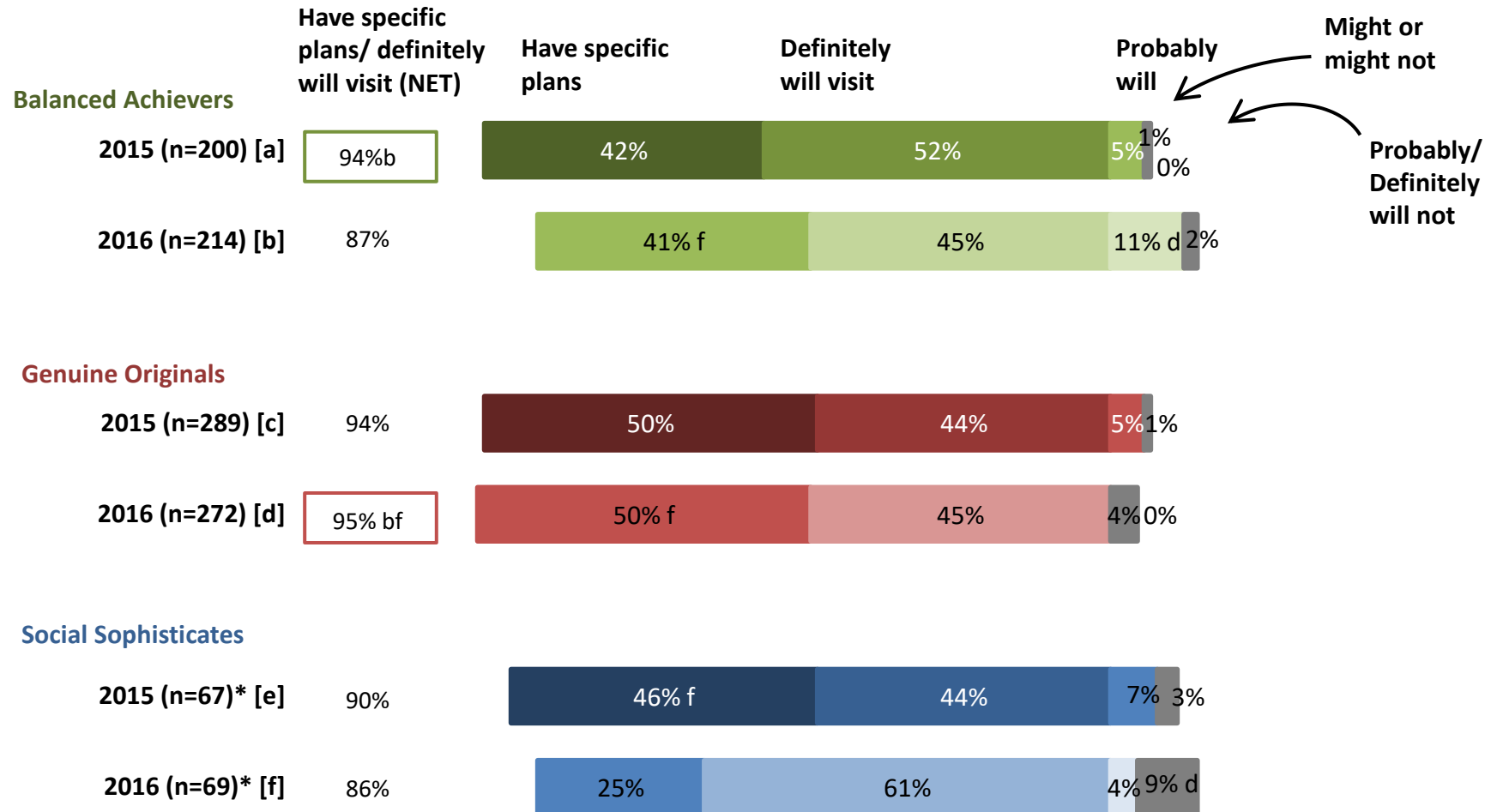
Top 2 Box: Somewhat Above/Far Exceeded My Expectations	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2015 (n=200) [a]	2016 (n=214) [b]	2015 (n=289) [c]	2016 (n=272) [d]	2015 (n=67) [e]	2016 (n=69) [f]
Overall experience	73%	73%	68%	65%	71%	68%
Friendliness of people	69%	69%	57%	61%	70%	62%
Quality of dining	65%	68% d	54%	56%	63%	62%
Distinctive, genuine, and unique experiences	65%	63%	57%	62%	62%	48%
Overall quality of customer service	64%	64%	55%	56%	70%	62%
Accessible, diverse, and abundant shopping choices	64%	66% d	44%	47%	54%	59%
Great selection of family attractions and venues	64%	67% df	45%	41%	47%	44%
Variety of activities available	63%	65%	55%	54%	54%	51%
Welcoming locals who make visitors feel comfortable	62%	69% df	53%	50%	56%	52%
Availability of family dining	62%	69% df	44%	42%	50%	38%
Availability of fine dining	62%	58% df	34%	36%	37%	38%
Authentic communities with their own individual personalities	61%	62%	53%	54%	56%	47%
Overall value for the money	60%	64% d	48%	49%	57%	53%

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.

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

Likelihood of visiting Maine again in the next two years is highest for summer day visitors categorized as *Genuine Originals*.

Likelihood of Returning to Maine: Day Visitors



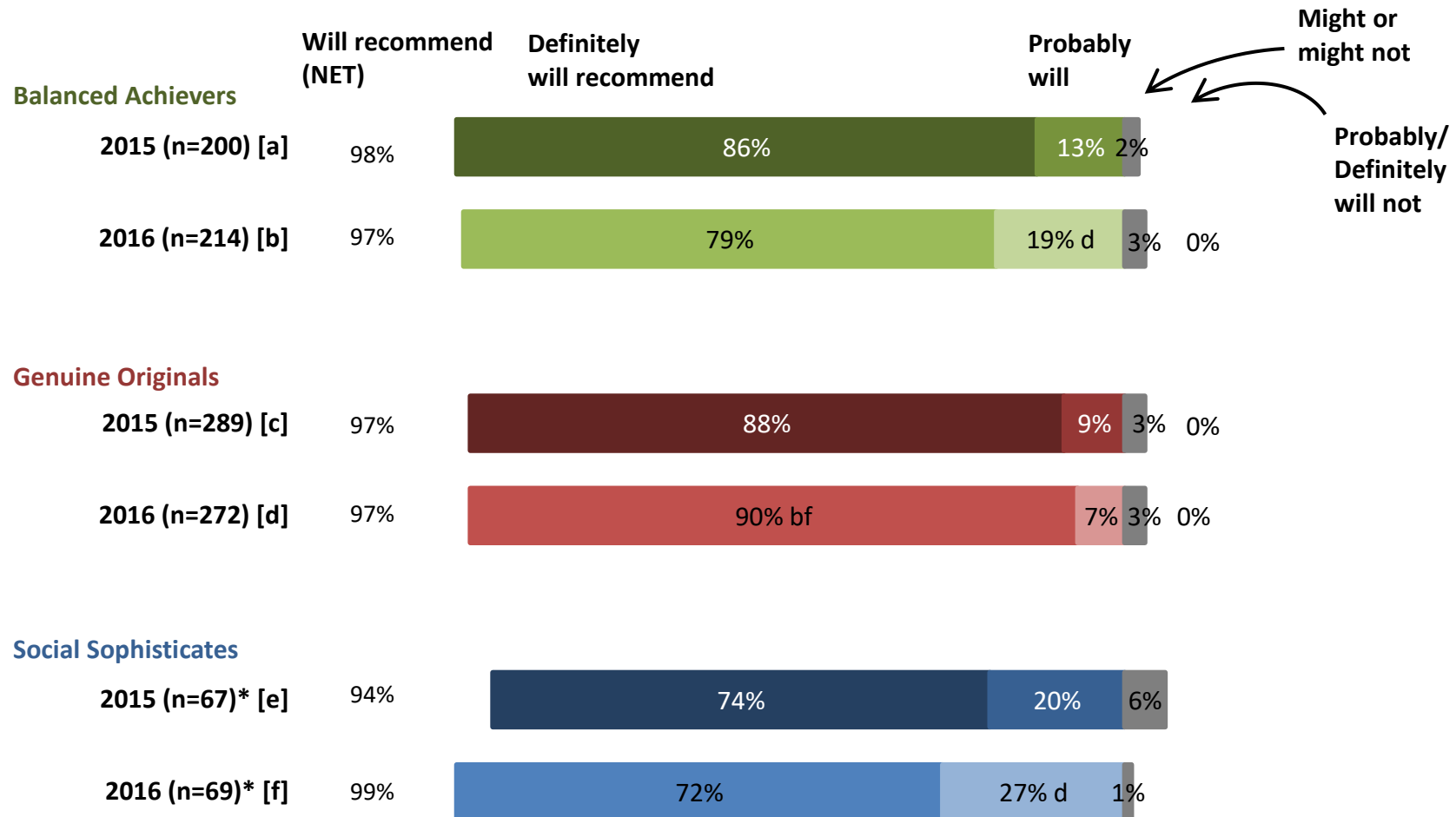
Q31. How likely will you be to travel in Maine in the next two years?

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

*Please note small sample size. Use caution in interpretation of findings.

Genuine Originals are the most likely segment of summer day visitors to indicate that they *definitely will recommend* Maine as a vacation destination.

Likelihood of Recommending Maine: Day Visitors



Q33. How likely are you to recommend Maine as a vacation destination to friends or relatives?
 a/b/c/etc. indicate a significant difference between subgroups at the 95% confidence level.
 *Please note small sample size. Use caution in interpretation of findings.



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