



# Maine Office of Tourism Visitor Tracking Research Summer 2016 Seasonal Topline



*Prepared by*



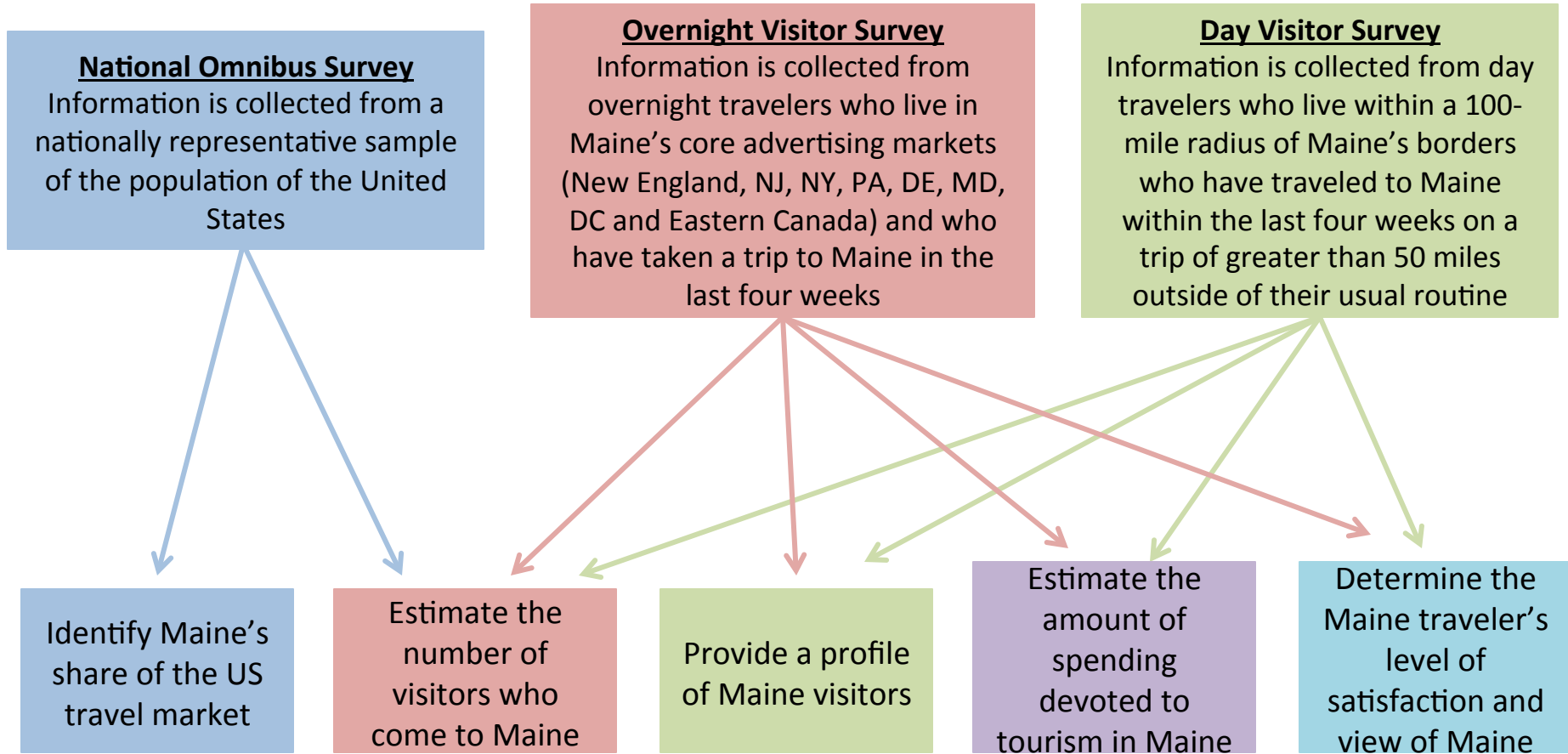
October 2016

# Purpose and Methodology

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# 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

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- Nationwide overnight travel from May to August 2016 showed another increase when compared with prior summer seasons. This increase was seen across the board in leisure, VFR, and business travel. The continual decline in the relative cost of travel nationwide (as indicated by the Travel Price Index), as well as a consistently lower cost of gasoline, likely have positively impacted travel behaviors throughout the nation.
- Maine shared in this growth, experiencing a nearly 5% increase in tourism-related overnight visitation to the State and a 2.6% increase in day visitation.

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- Increased targeting of markets further away from Maine continues to draw in more visitors from the Mid-Atlantic. The proportion of overnight visitors arriving from the Mid-Atlantic region showed an increase over the prior summer season (2015) – posting growth for the second year in a row. Ongoing marketing to this region will be beneficial, as Mid-Atlantic visitors tend to stay in Maine longer than do visitors from New England and the Eastern Canadian provinces. They are also younger and present a longer lifetime value as repeat visitors to the State.
- The 2016 summer season experienced an increase in the proportion of first-time overnight visitors coming to Maine. The uptick in first-time visitation appears to be driven at least in part by the increase in overnight visitors from the Mid-Atlantic region, as they are more likely to be first-timers than are those who live closer to Maine. Monitoring of first-time visitation trends among overnight visitors in the coming months will help to determine whether or not these gains will be sustained.
- Once again, both overnight and day visitors express strong intent for taking another trip to Maine in the next two years. Eight in ten overnight visitors and nine in ten day visitors indicate that they *already have specific plans to return to Maine or definitely will travel to Maine* in the next two years. This further supports an ongoing strategy of introducing Maine to new (first-time) visitors with an expected continual flow of repeat visitors to the State.

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- The persistent downward trend in the exchange rate does not appear to have had a negative impact on Canadian's decision to visit – at least in summer. The proportion of Canadian visitors in Maine during the 2016 summer season is similar to the prior two summer seasons (2014 and 2015). Still, economic forecasts for 2016 and early 2017 predict the Canadian exchange rate will not improve significantly, and marketing aimed at this important target audience should reinforce the notion that a trip to Maine is worth the added expense, despite the weakened Canadian dollar.
- In terms of trip pursuits, *food/beverage/culinary* and *shopping* activities remain the top interest areas among both overnight and day visitors to Maine. These stated interests are further supported by reported expenditures, with overnight visitors spending the highest proportion of money in the lodging and food categories, and day visitors spending the highest proportion on food and retail goods. Though dining and shopping remain the top interests among Maine's visitors, *touring/sightseeing* falls closely behind among overnight visitors.

# Executive Summary

- Maine continues to receive extremely favorable evaluations from its visitors, especially on those attributes related to Maine's people. More than three in five summer visitors stated that their vacation exceeded their expectations for *overall experience* (71%), *friendliness of the people* (64%), *welcoming locals who make visitors feel comfortable* (61%), and *overall quality of customer service* (62%). Residents continue to be a valuable component of the Maine vacation experience, and ongoing promotion of this asset is warranted.
- Not surprisingly, the Maine Beaches region continues to be the State's main draw during the summer season, with 25% of overnight visitors and 39% of day visitors listing this region as their primary destination in Maine. Serving as an entry point and likely first stop for visitors arriving from the south, the Beaches region is in a prime position to be a vantage point for keeping visitors in Maine for longer periods of time. Therefore, ideas for beach vacation add-ons should be highlighted and promoted within Maine's ongoing advertising – keeping in mind that the region is most popular among leisure and VFR travelers, repeat visitors, and non-residents.



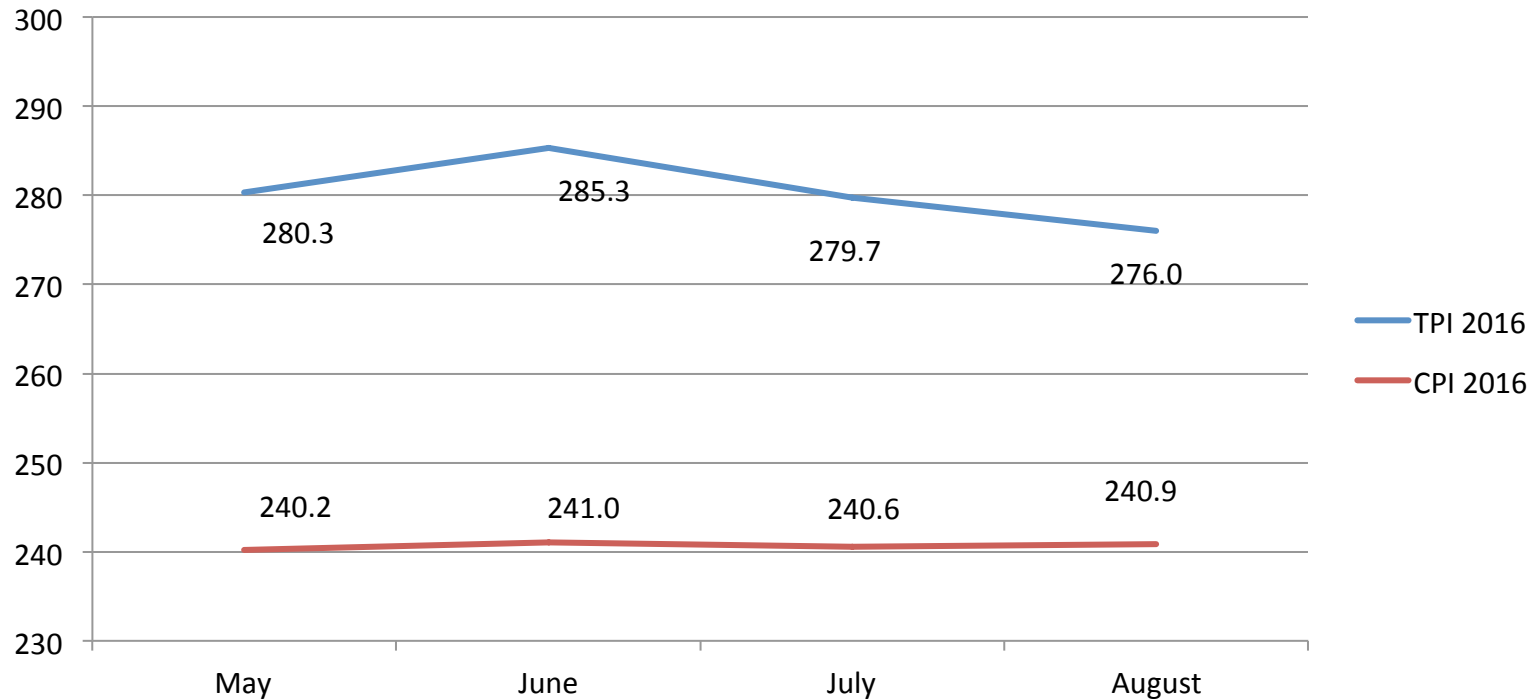
# 2016 Summer Season Travel Context

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# Travel Price Index continues to exceed the Consumer Price Index, indicating the high cost of travel relative to other goods.

- However, the Summer 2016 TPI Index (averaging 280.3) came in lower than the Summer 2015 Index (averaging 283.5), completing its second year-over-year drop. The Consumer Price Index, on the other hand, increased over last summer. This may signal a potential drop in the relative cost of travel as compared to other goods.

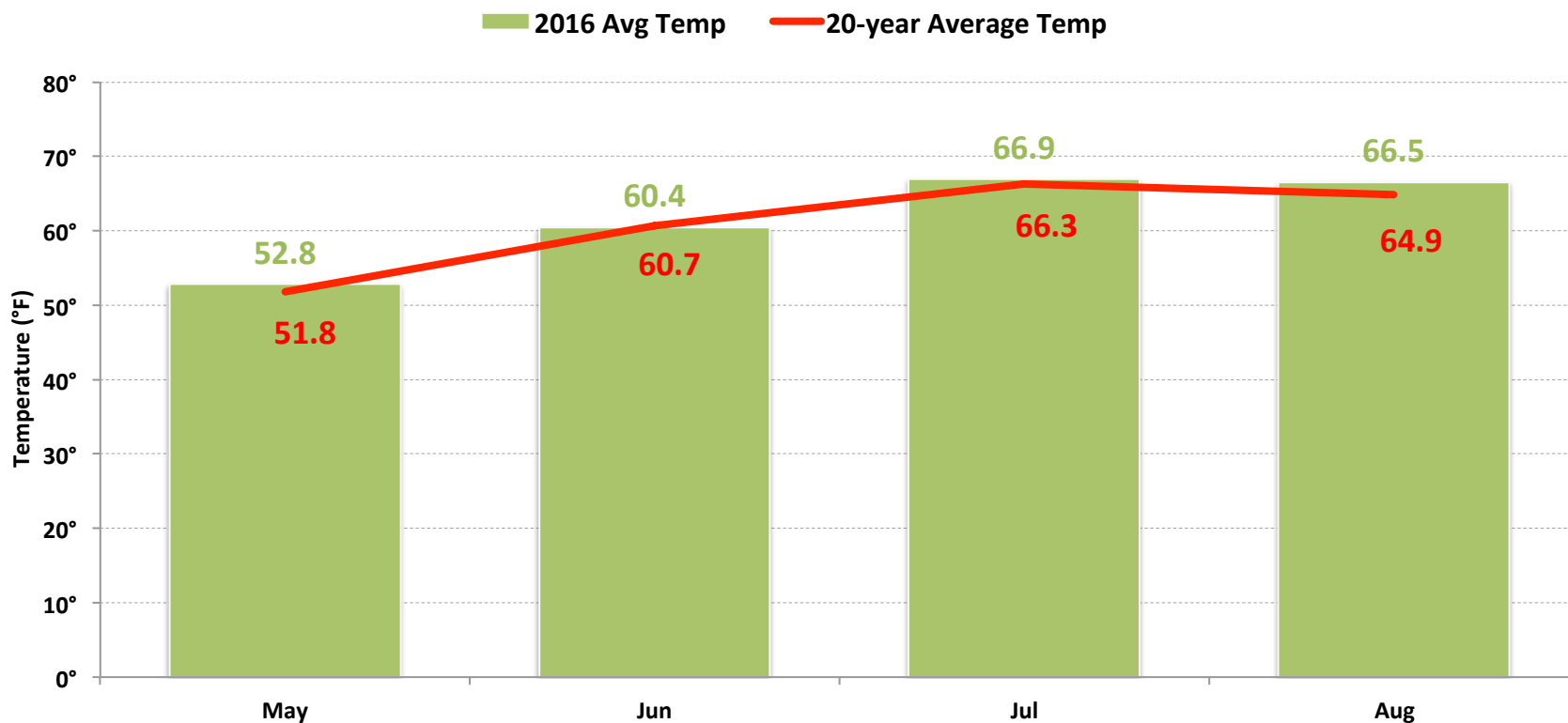
**Consumer Price Index and Travel Price Index**



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

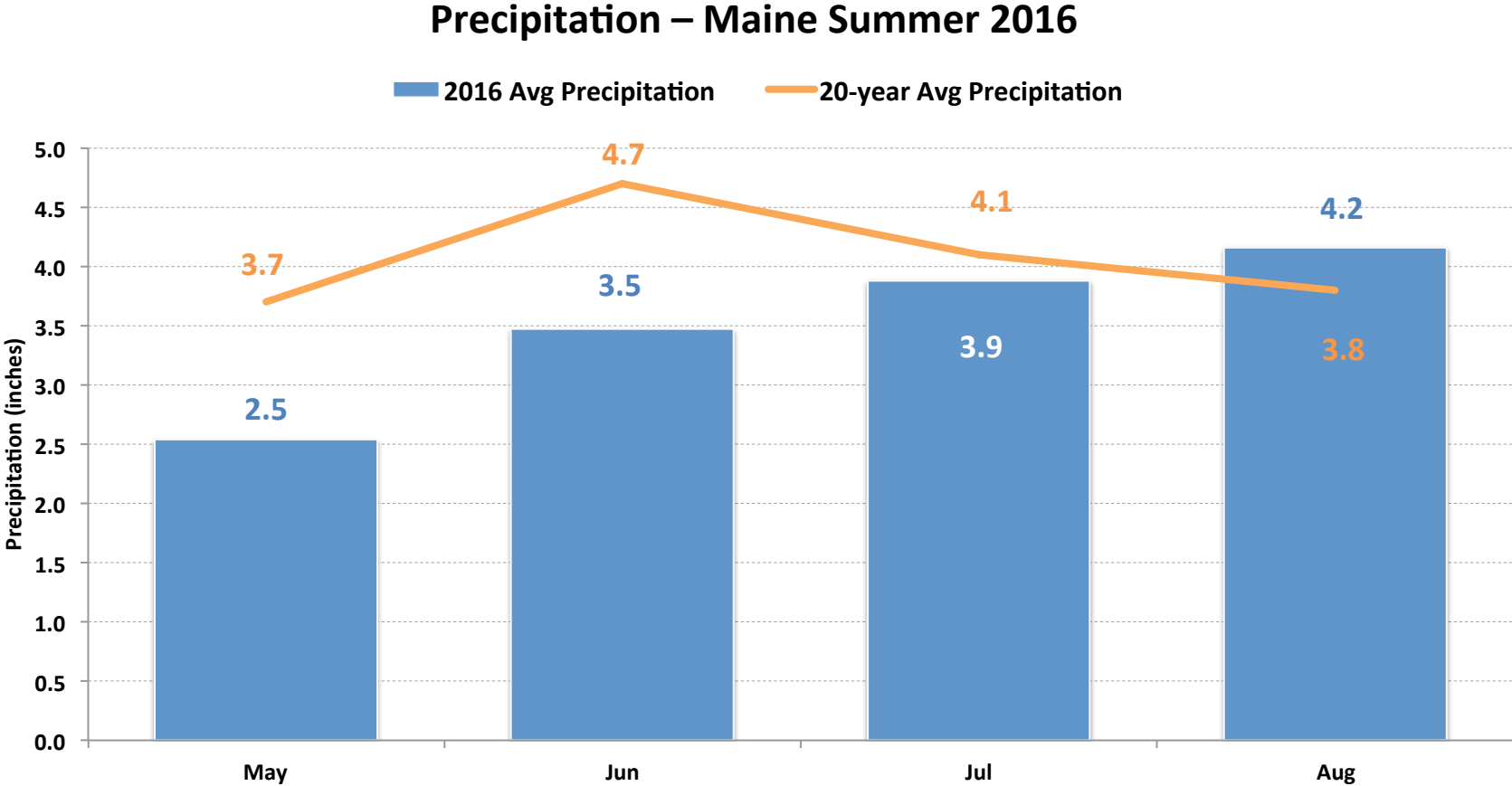
Temperatures during the Summer 2016 season were comparable to the 20-year average for the State.

### Temperature – Maine Summer 2016



Data source: NOAA.gov

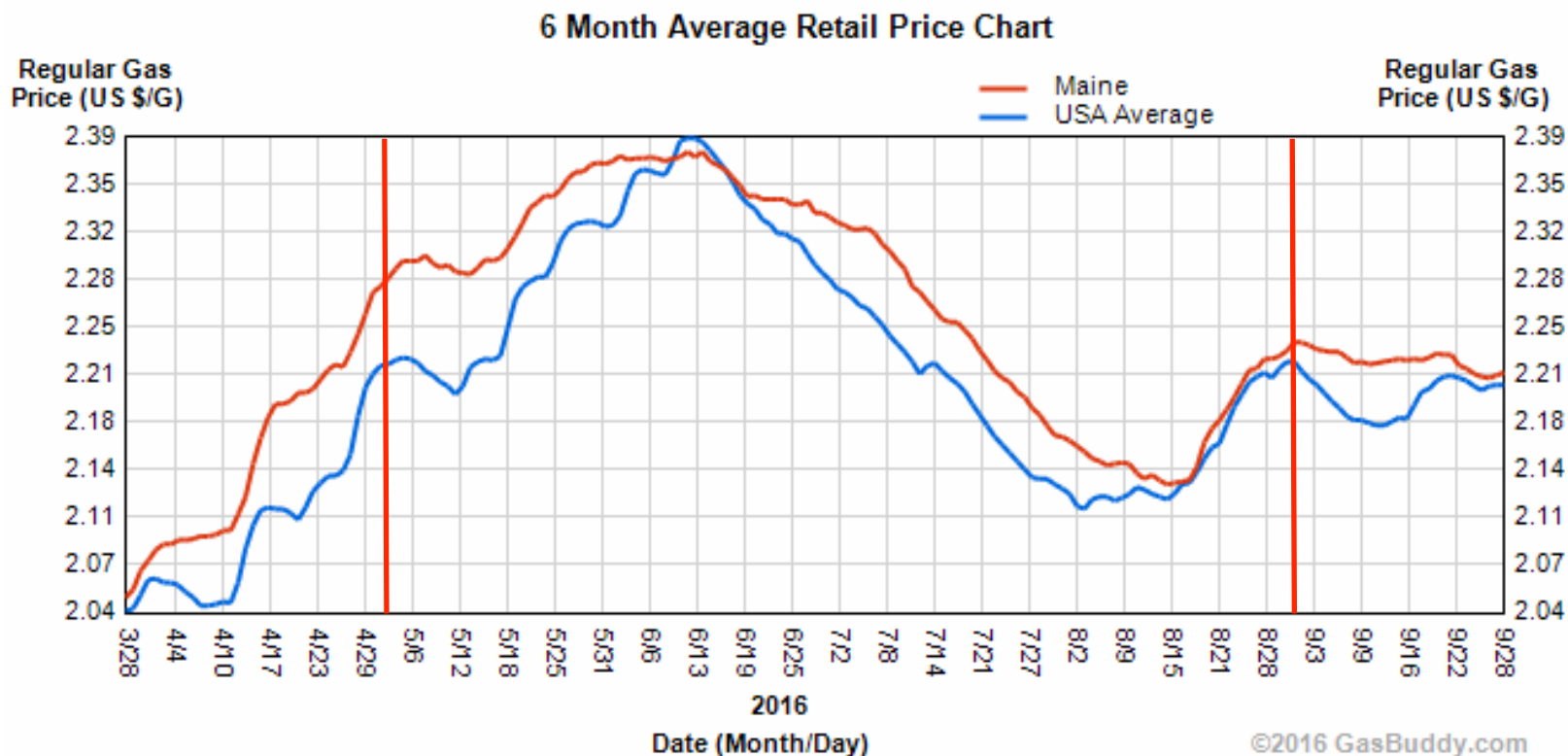
Maine's summer 2016 precipitation was below the 20-year average for all months except August.



Data source: NOAA.gov

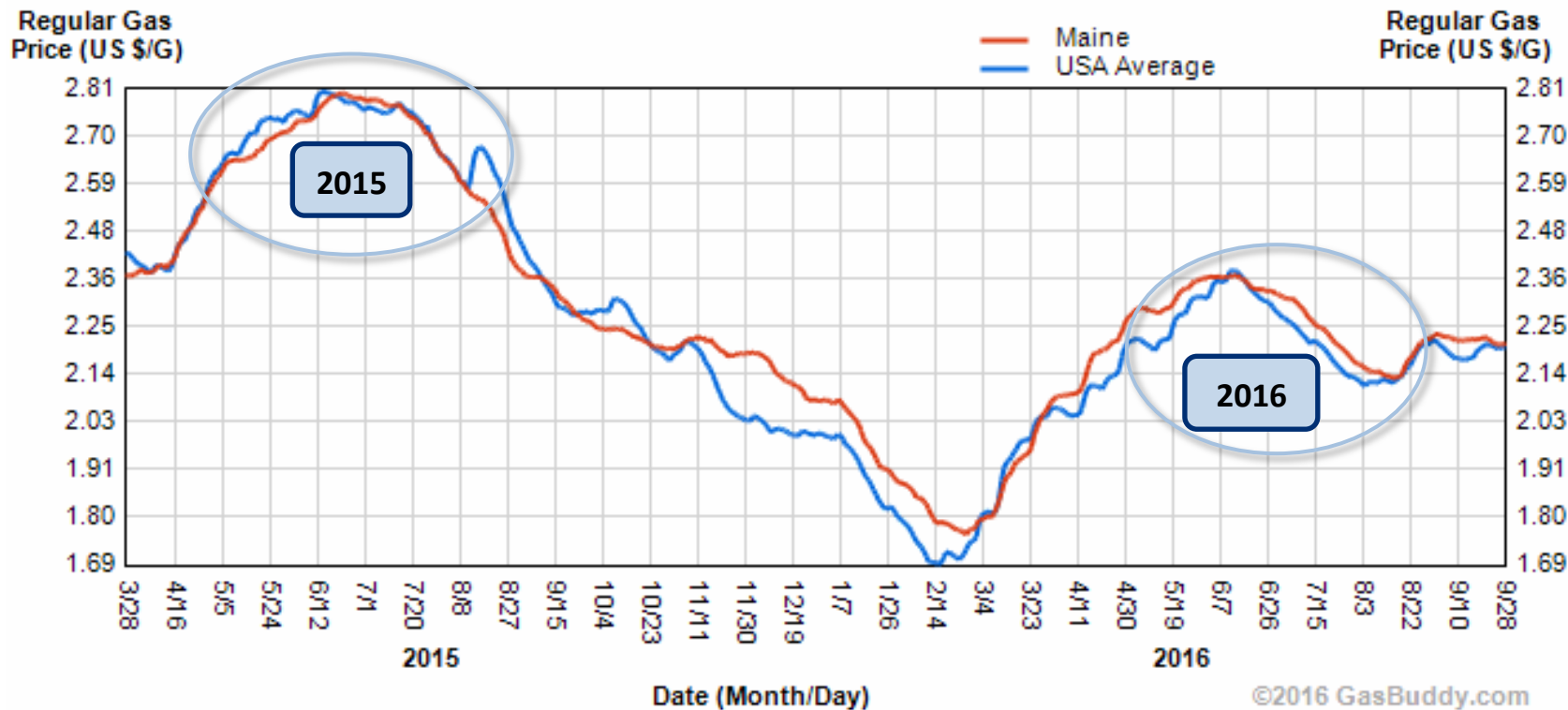
# Maine gas prices were above US prices during the summer season, with the exception of early June.

- Maine gas prices peaked in mid-June and hit their lowest point in mid-August, when they began to climb again.



Summer season gas prices nationwide and in Maine were significantly lower this summer than last, continuing the decline seen since 2014.

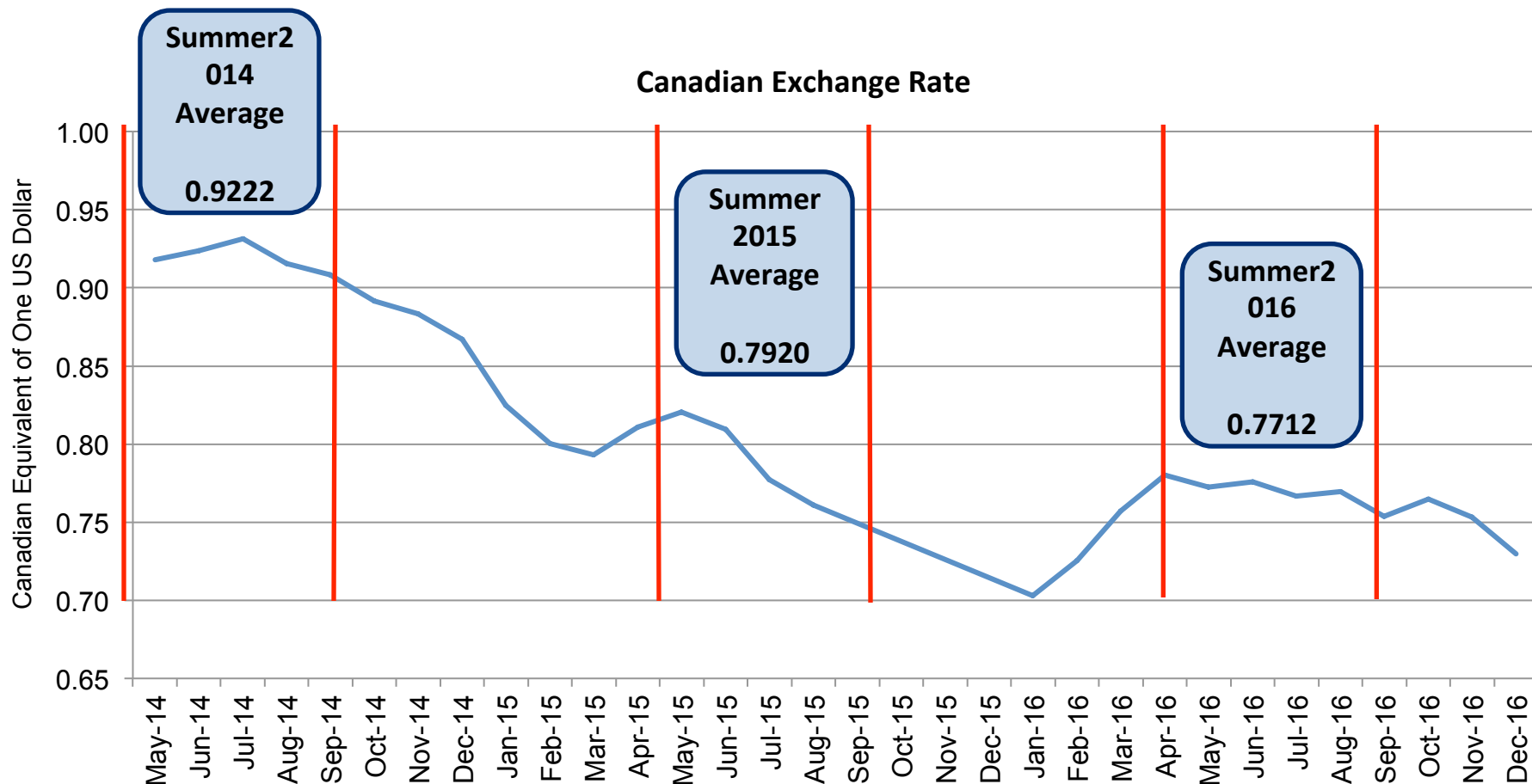
18 Month Average Retail Price Chart



©2016 GasBuddy.com

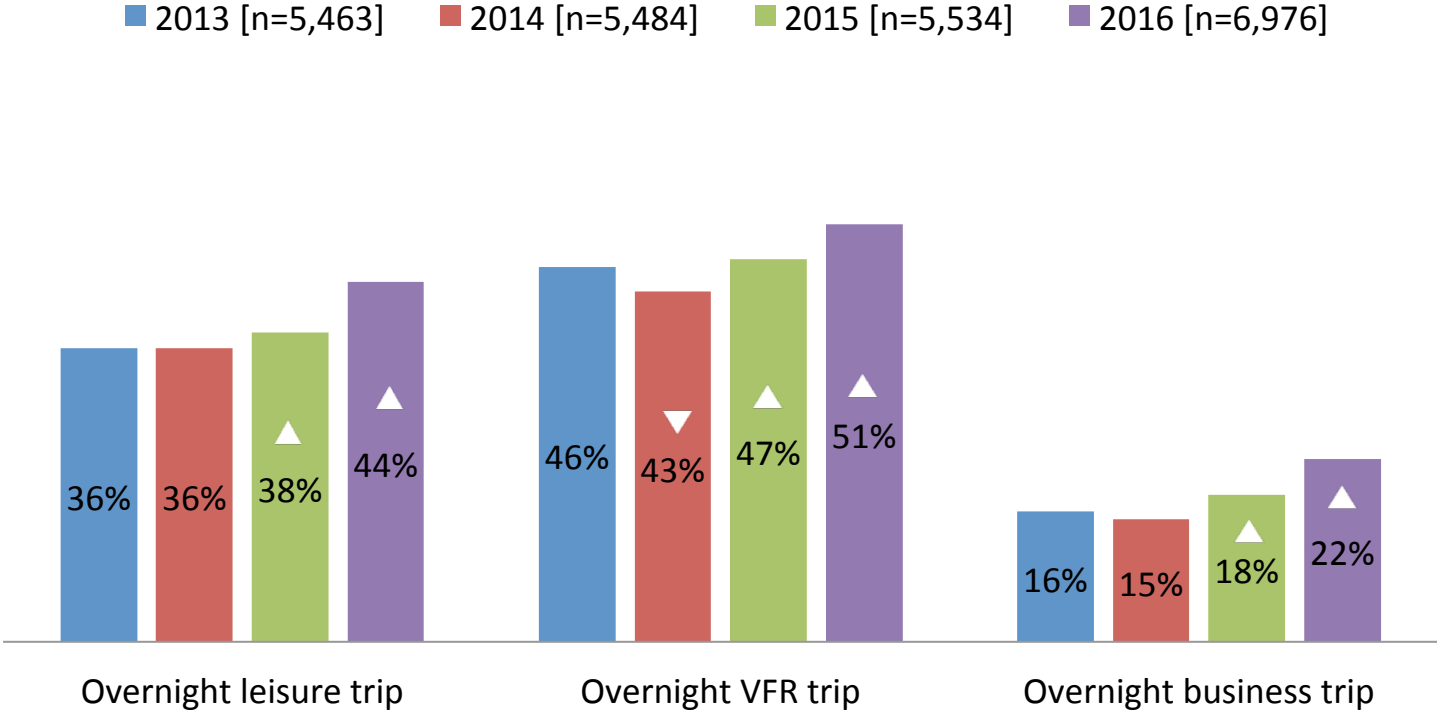
# The Canadian exchange rate continued its decline during Summer 2016, though the drop was not as steep as during the prior three years.

- Since the 2014 summer season, the Canadian exchange rate has dropped from a favorable 0.92 down to an unfavorable 0.77.



As in the previous year, nationwide summer travel showed a moderate increase over the prior summer season.

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



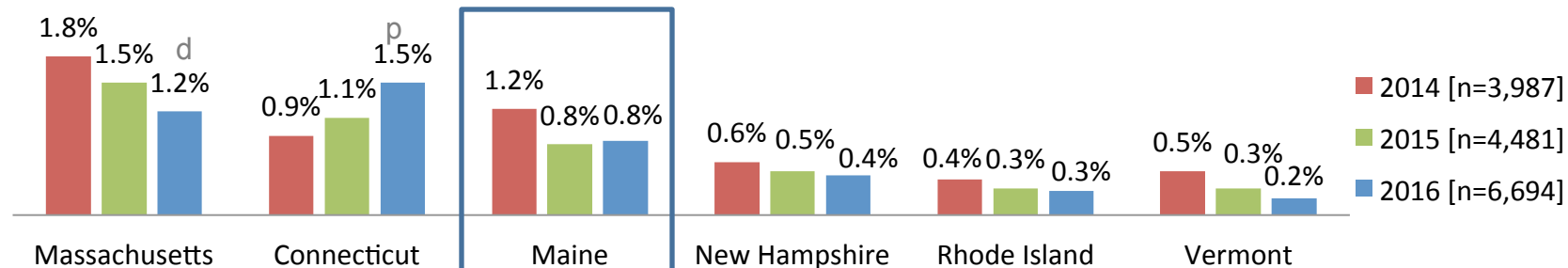
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

pq notes significant difference between the current and prior year at the 95% confidence level

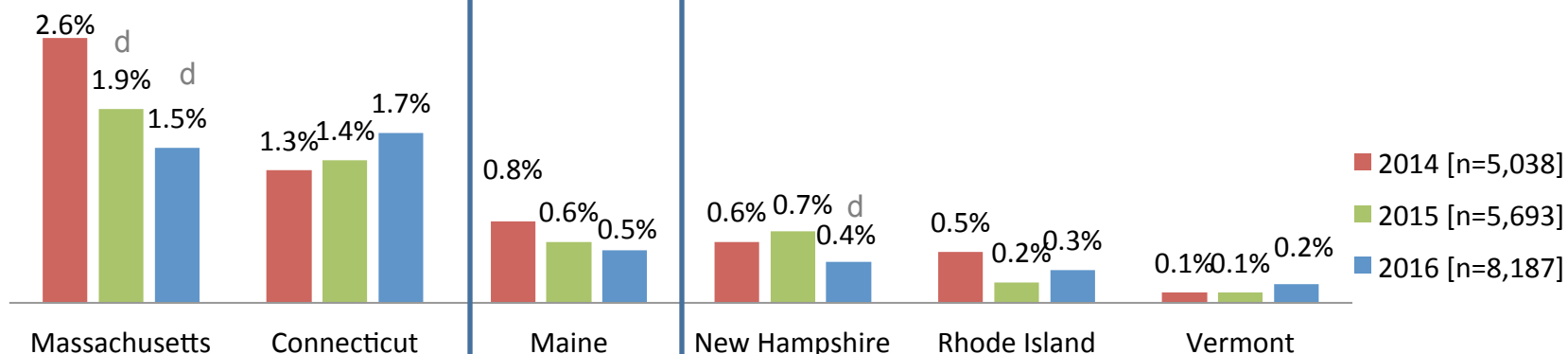


# Maine continues to hold on to about 1% of the national overnight leisure travel market, trailing Massachusetts and Connecticut.

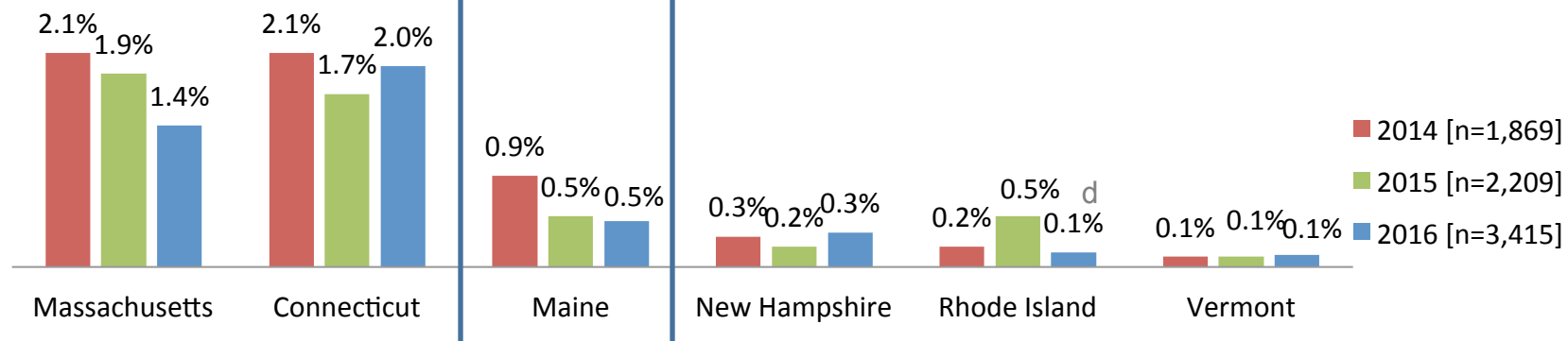
## Overnight Leisure Trips



## 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.

pq notes significant difference between the current and prior year at the 95% confidence level

# 2016 Summer Season Highlights

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# Estimated summer visitation to Maine increased more than 3% from 2015 to 2016, with overnight visitation showing growth of nearly 5%.

**Note: Visitation estimates provided here are preliminary and reflect visitation from May through August 2016. Adjustments will be made to these estimates at the end of the year for the Annual Report, to account for seasonal fluctuations.**

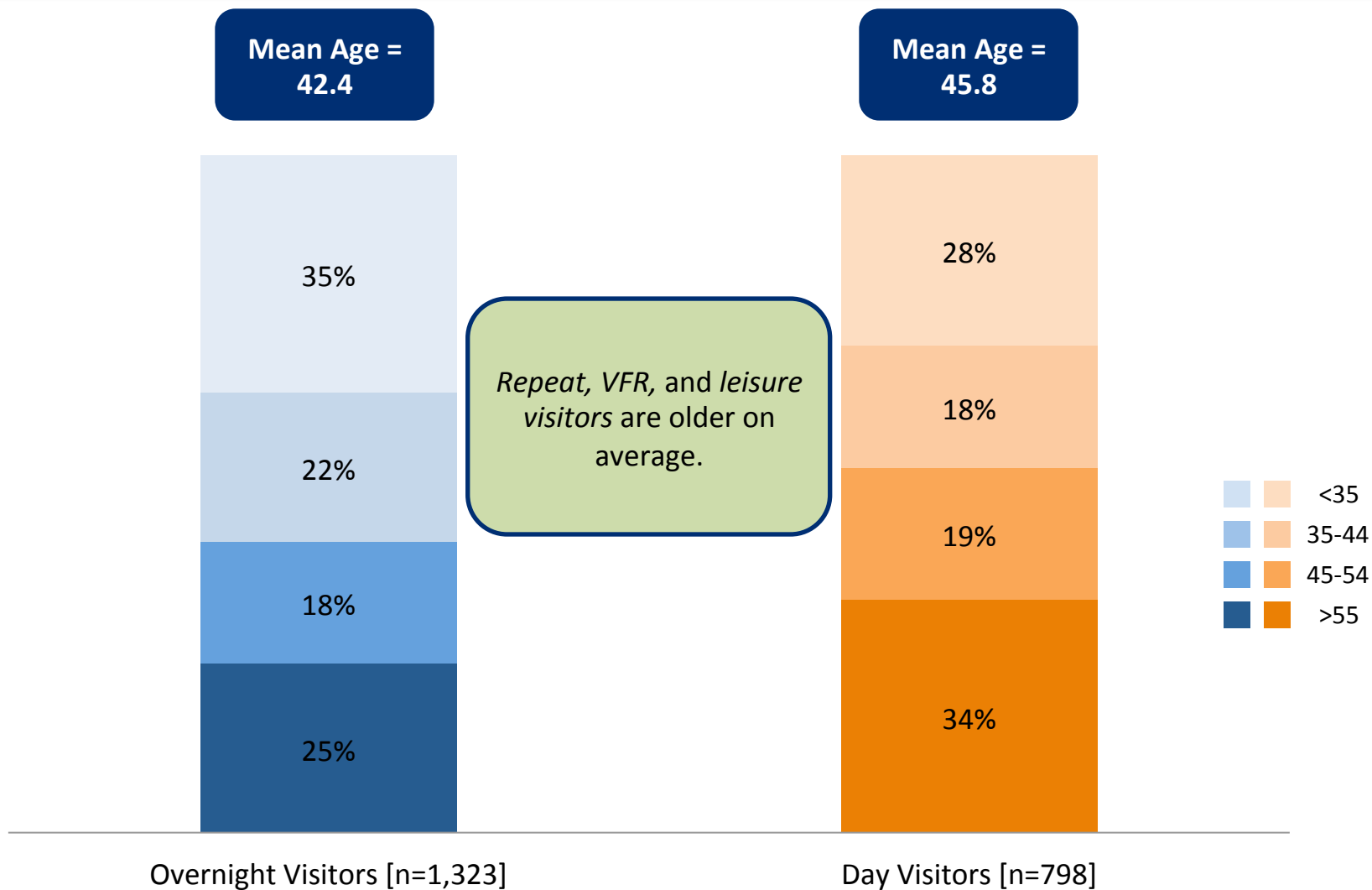
Visitation Estimates*	Summer 2015	Summer 2016	% Chg
<b>Total Estimated Visitation</b>	<b>24,254,902</b>	<b>25,067,053</b>	<b>+ 3.3%</b>
<i>Overnight Visitors</i>	<i>9,172,760</i>	<i>9,598,991</i>	<i>+ 4.6%</i>
<i>Day Visitors</i>	<i>15,082,142</i>	<i>15,468,062</i>	<i>+ 2.6%</i>

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

Tourism related trips include:

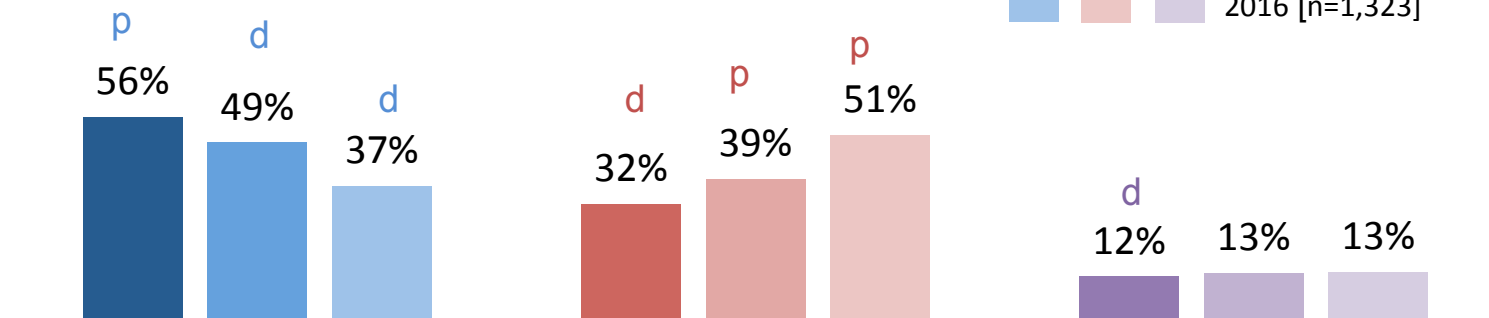
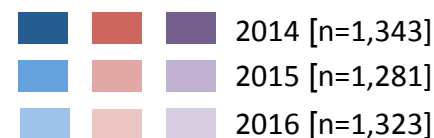
- All leisure trips.
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.
- Business trips that are for a convention/conference/trade show or training/professional development.

# Maine summer visitors are in their 40s and 50s on average, with day visitors slightly older than overnight visitors.



# Summer 2016 showed no change in the relative proportions of visitors from Canada and the United States, although there was an increase in the proportion of U.S. visitors from the Mid-Atlantic states.

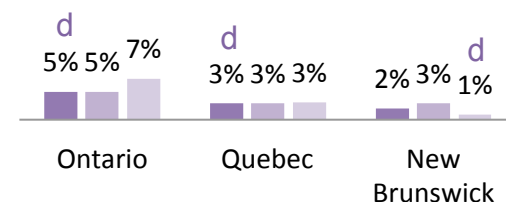
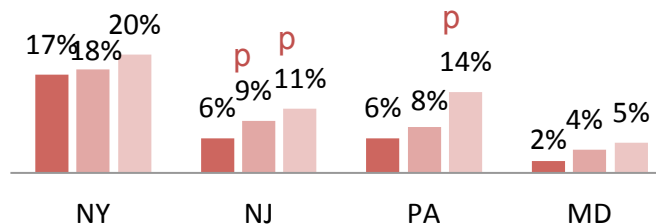
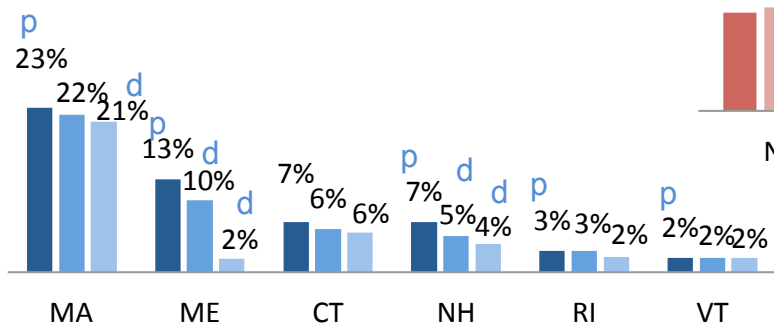
The shift in the proportions of domestic visitors by area of origin began in 2015 and continued in 2016, with half of all overnight visitors arriving from the Mid-Atlantic states.



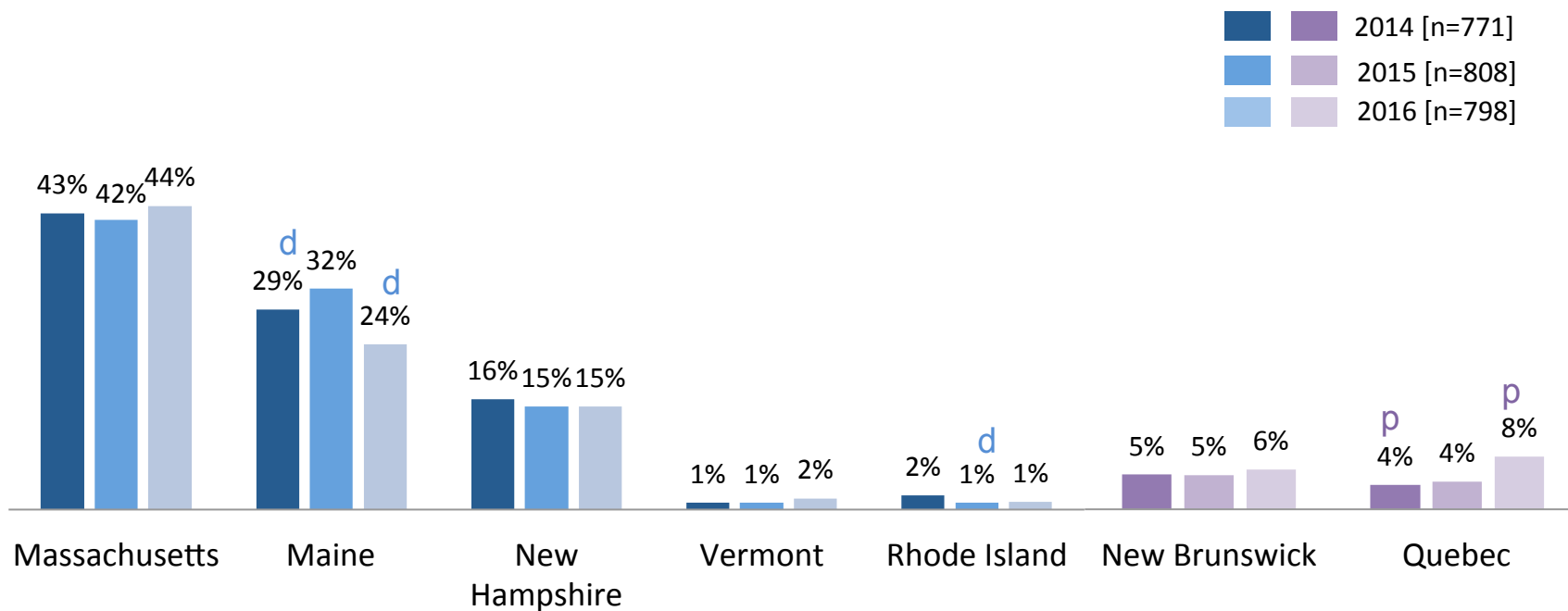
US - New England

US - Mid Atlantic

Canada

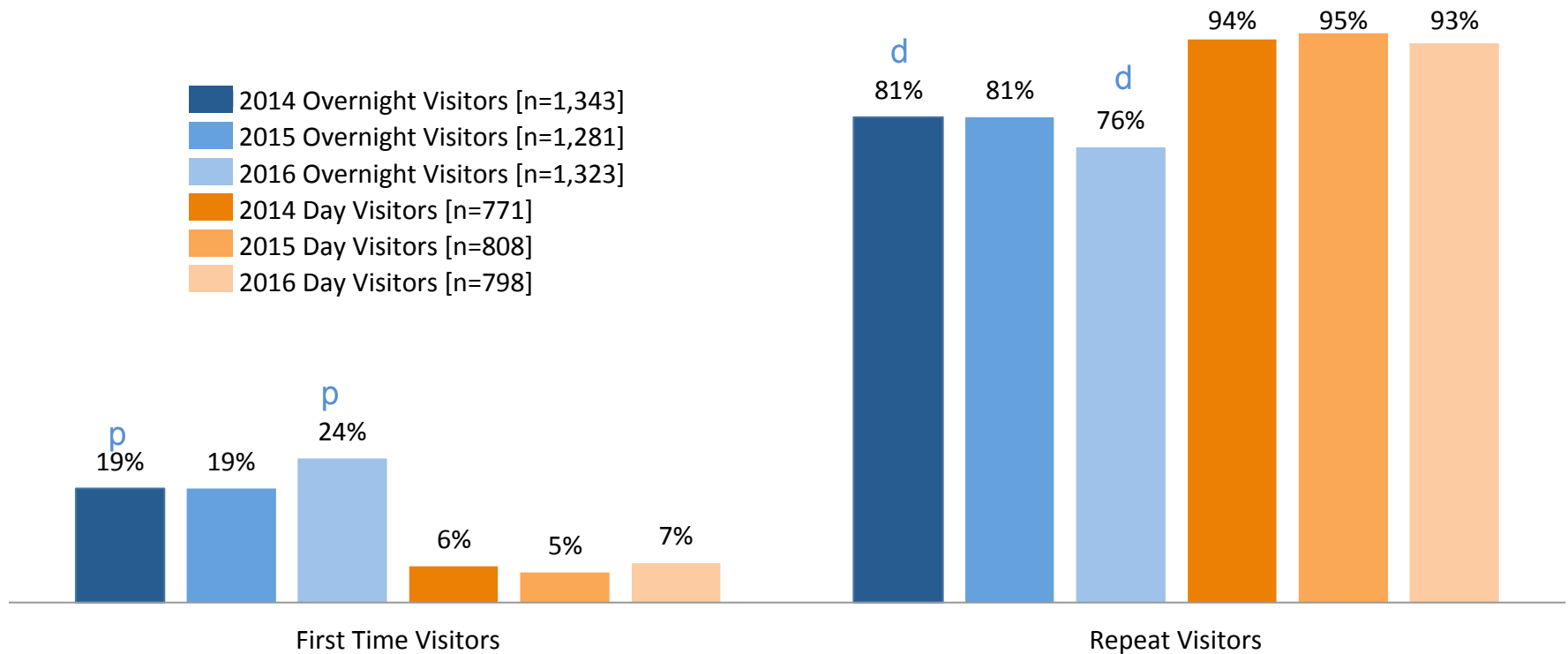


# Massachusetts and Maine continue to provide the greatest proportions of summer day visitors to Maine, although the proportion of in-state day visitors decreased this year.



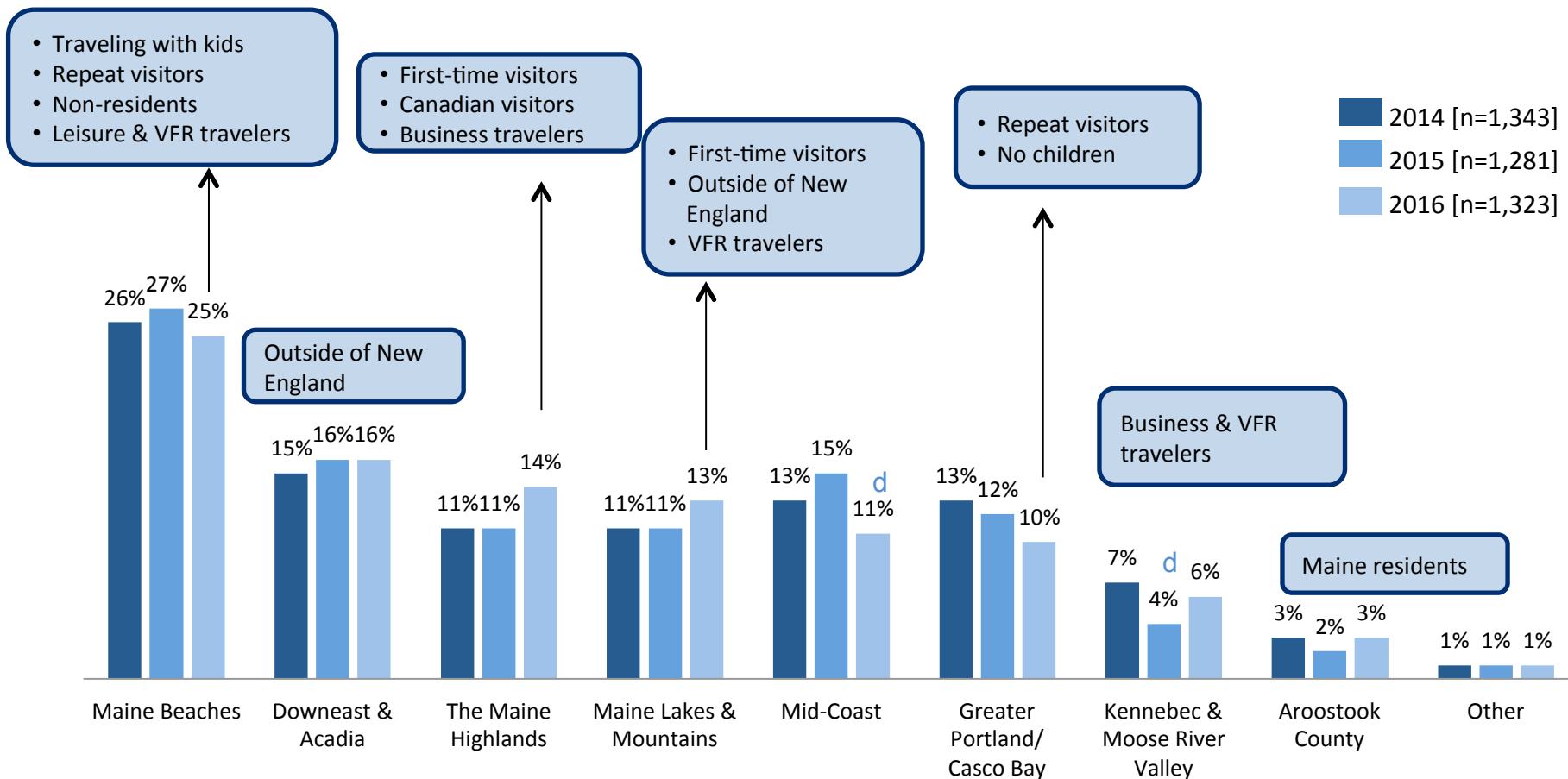
# There was a slight increase in the proportion of overnight first-time visitors in 2016 from previous years.

- First time overnight and day visitors have largely similar demographic attributes and travel patterns.
  - Both overnight and day first-time visitors are more likely to be from Canada and under the age of 45. Additionally, they are more likely to be business travelers.
  - First-time overnight visitors are also more likely to be from the Mid-Atlantic region of the U.S.



# Once again, one-fourth of Maine's summer overnight visitors came to the Maine Beaches region.

- Within Maine's overnight visitor cohort, there are certain sub-groups that have a stronger propensity to visit specific tourism regions as noted below.



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

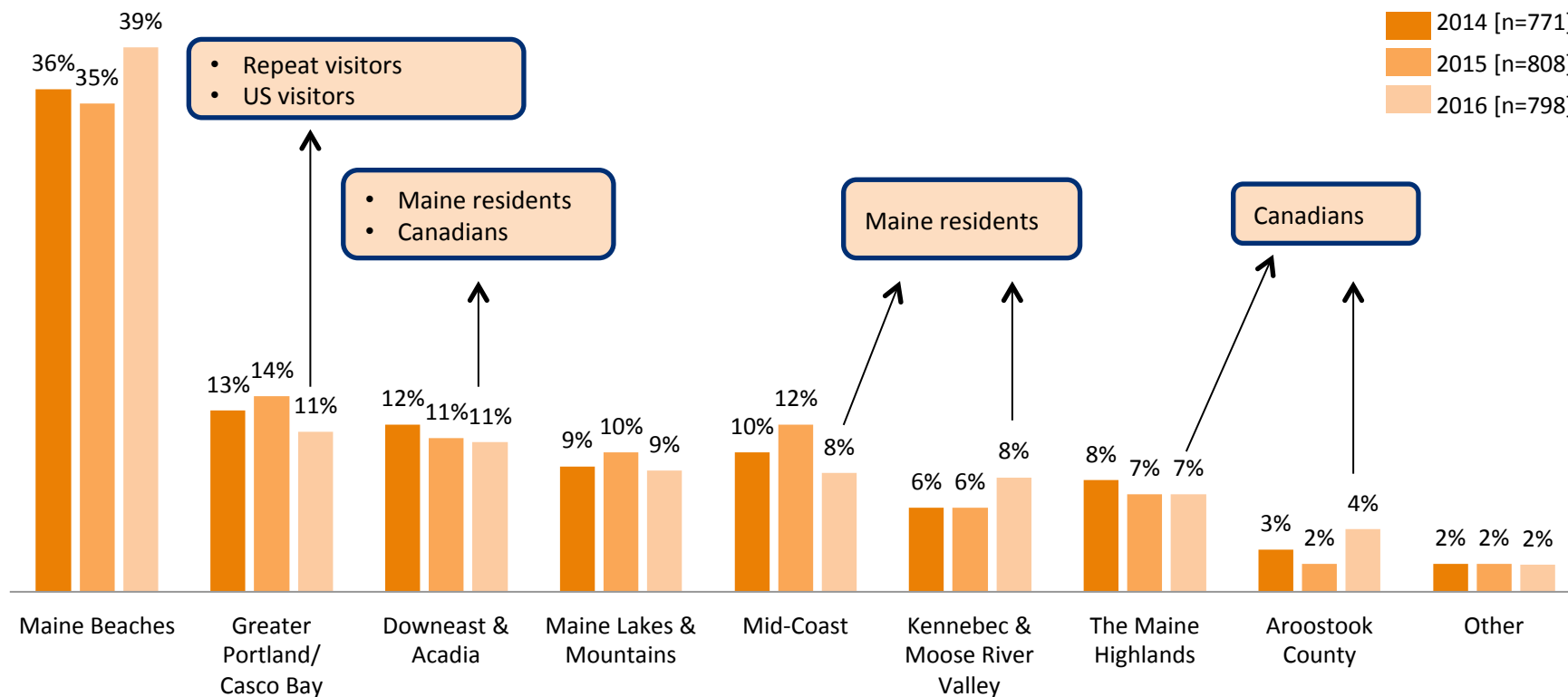
pq notes significant difference between the current and prior year at the 95% confidence level



# Maine's summer day visitors are also most likely to visit the Maine Beaches region.

- Within Maine's day visitor cohort, there are certain sub-groups that have a stronger propensity to visit specific tourism regions as noted below.

- Repeat visitors
- US non-residents
- Leisure & VFR travelers



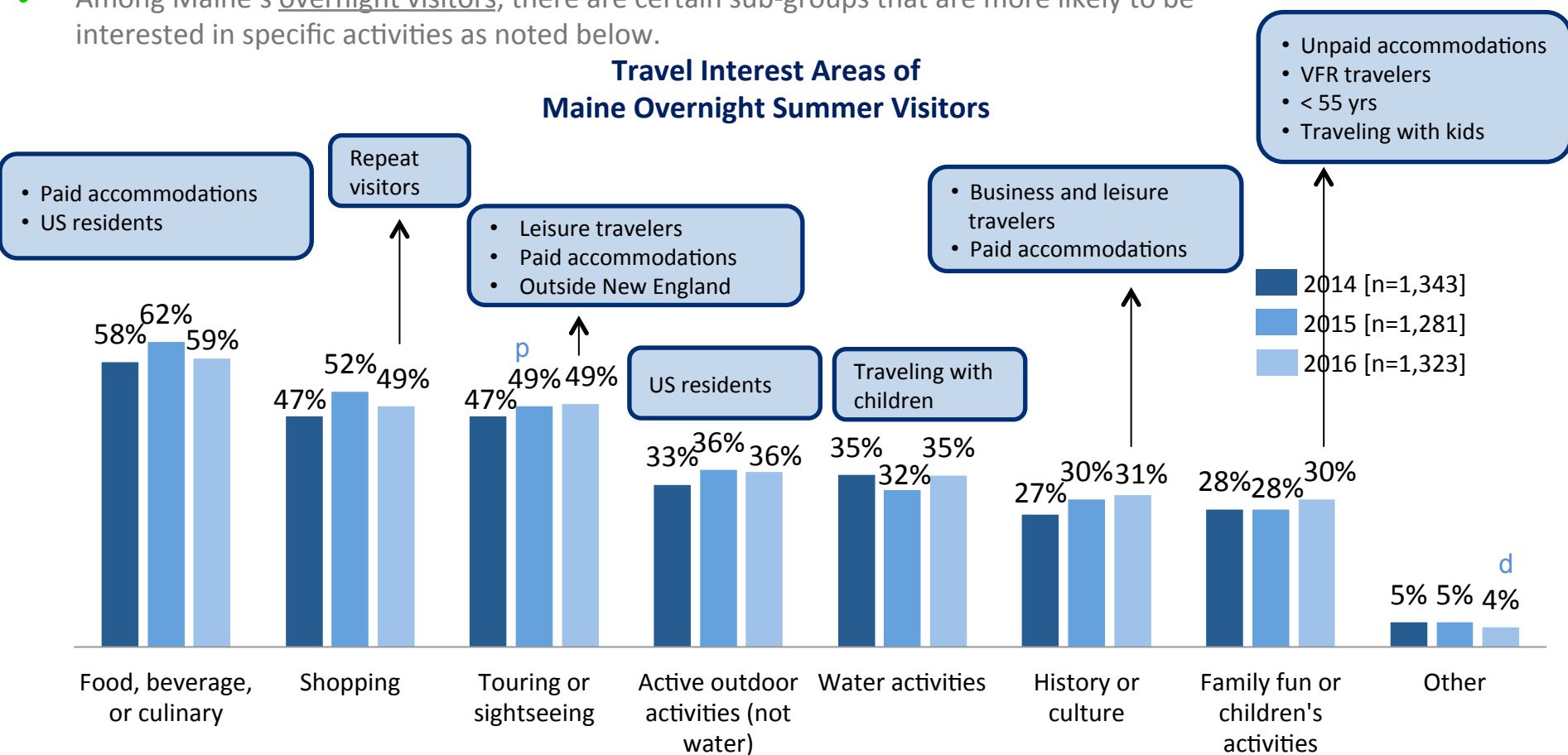
Day Q21. What region in Maine was your primary destination?

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# Most 2016 overnight summer visitors were interested in exploring Maine's various food/beverage/culinary options, shopping, or touring/sightseeing.

- The proportion of overnight summer visitors interested in the various types of activities remains consistent compared to the prior two summer seasons.
- Among Maine's overnight visitors, there are certain sub-groups that are more likely to be interested in specific activities as noted below.

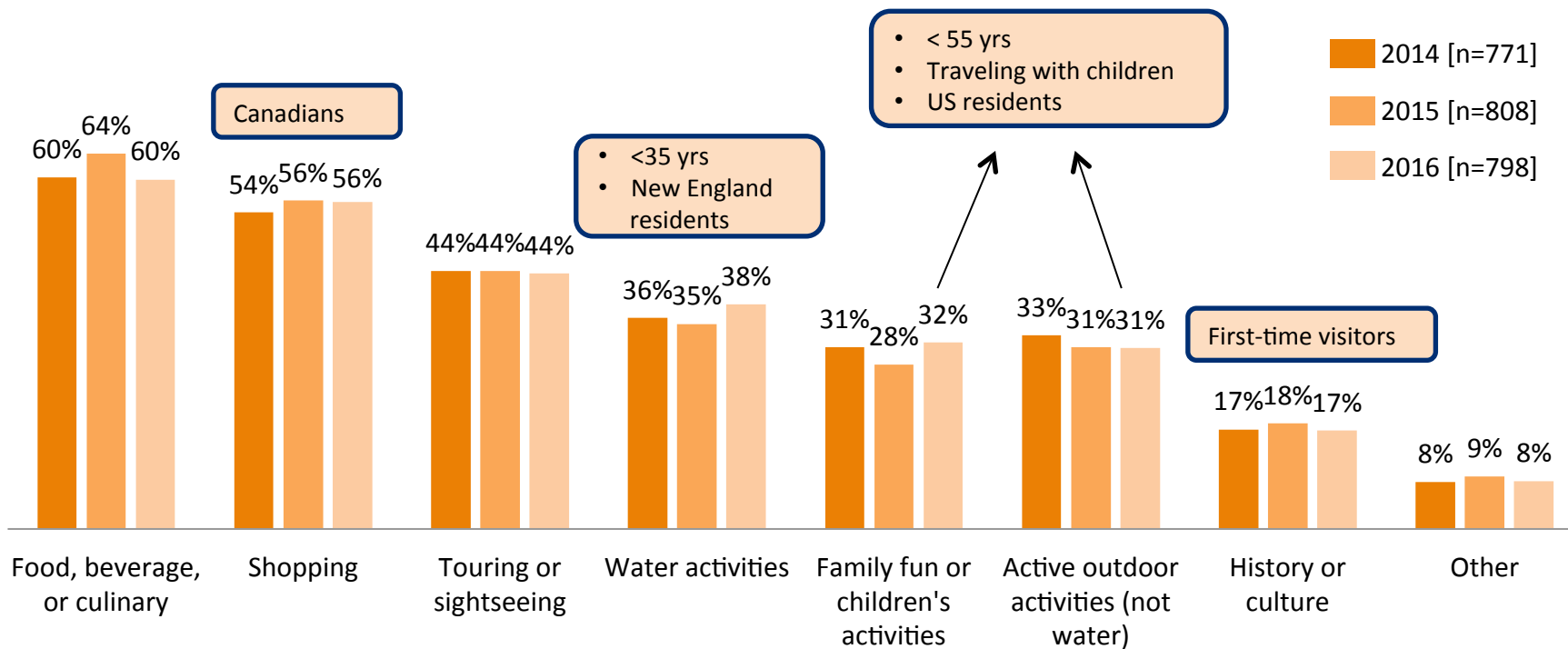
## Travel Interest Areas of Maine Overnight Summer Visitors



# Most summer day visitors are interested in exploring Maine's various food/beverage/culinary options or going shopping.

- Among Maine's day visitors, there are certain sub-groups that are more likely to be interested in specific activities as noted below.

## Travel Interest Areas of Maine Summer Day Visitors



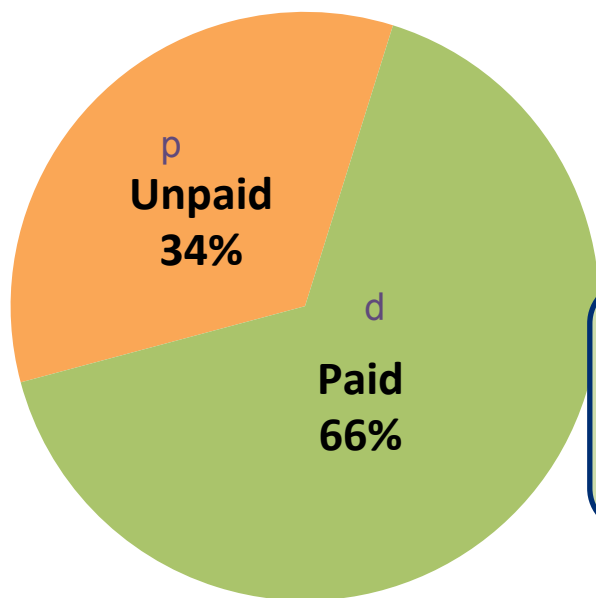
Q18: Which of the following interest areas did you want to pursue during this trip to Maine?

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# Two-thirds of overnight summer visitors are staying in paid accommodations while in Maine, a return to pre-2015 levels.

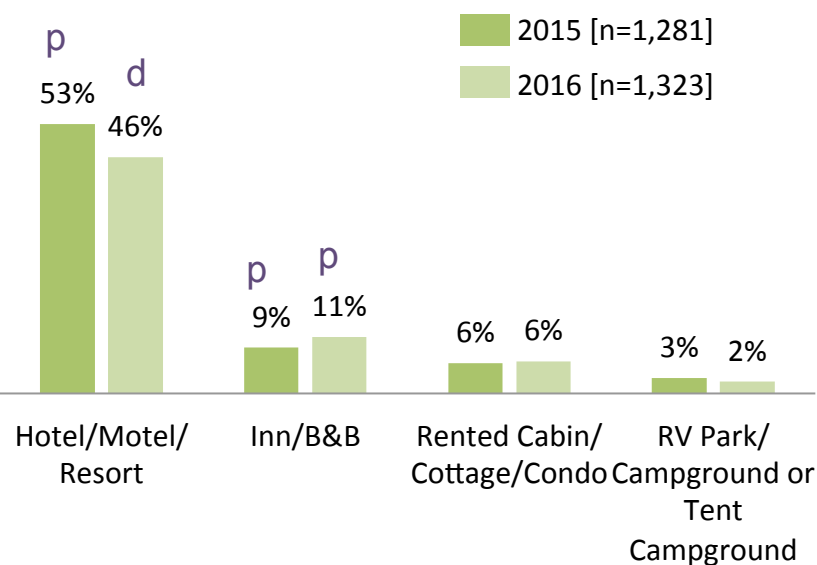
- On average, overnight visitors are staying in Maine for 3 or 4 nights. The average length of stay is longer for those traveling with children, those residing outside New England, and first-time visitors.

Type of Accommodation  
[n=1,323]



➔  
Canadians and leisure travelers are more likely to stay in paid accommodations.

Type of Paid Accommodation



**Average Length of Stay: 3.5 Nights**

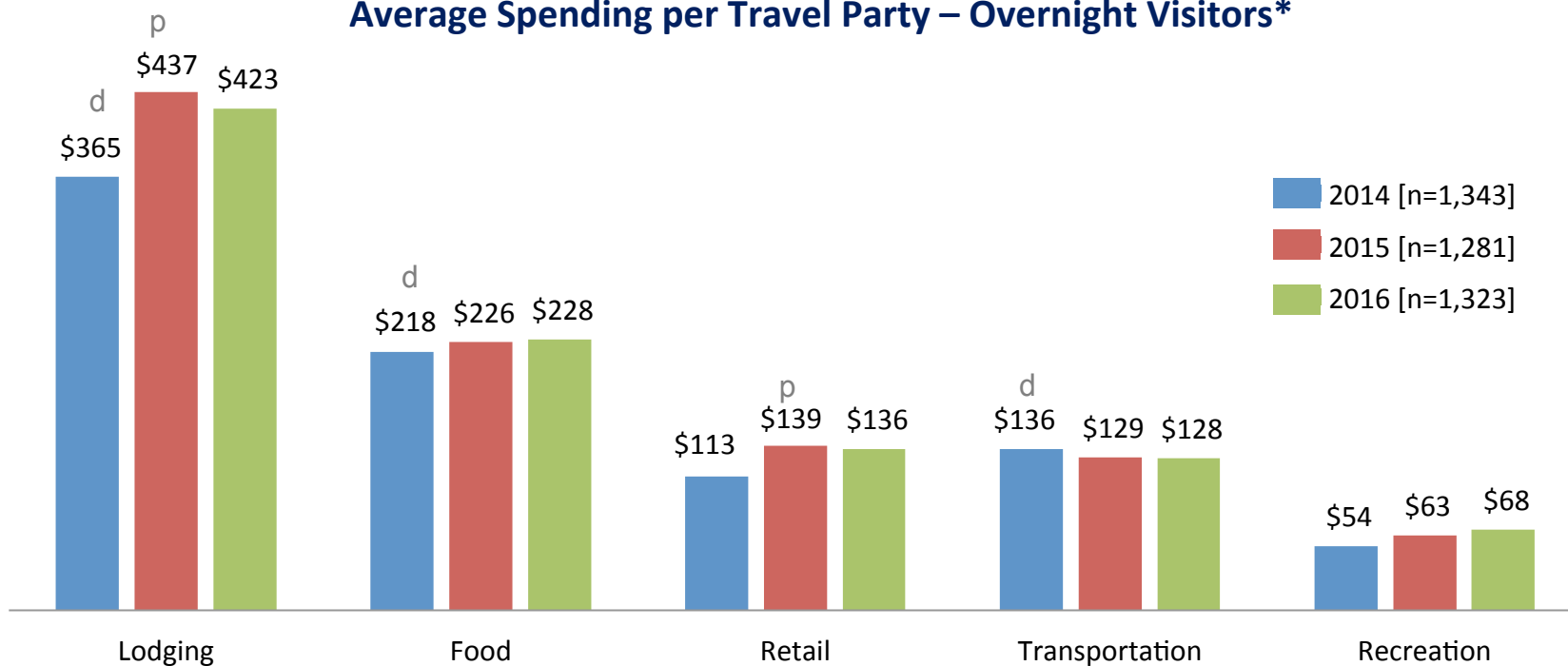
Overnight Q10. On this trip to Maine, how many nights were you away from home?

Overnight Q24. In which of the following types of accommodations did you spend the most nights on this trip to Maine? 28

pq notes significant difference between the current and prior year at the 95% confidence level

# Lodging and food expenditures continue to make up the greatest share of expenditures for summer overnight visitors.

Average Spending per Travel Party – Overnight Visitors\*



\*Reported figures represent the average amount of money spent per travel party, including parties that spent \$0.

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.

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

## Average Spending per Travel Party – Day Visitors\*

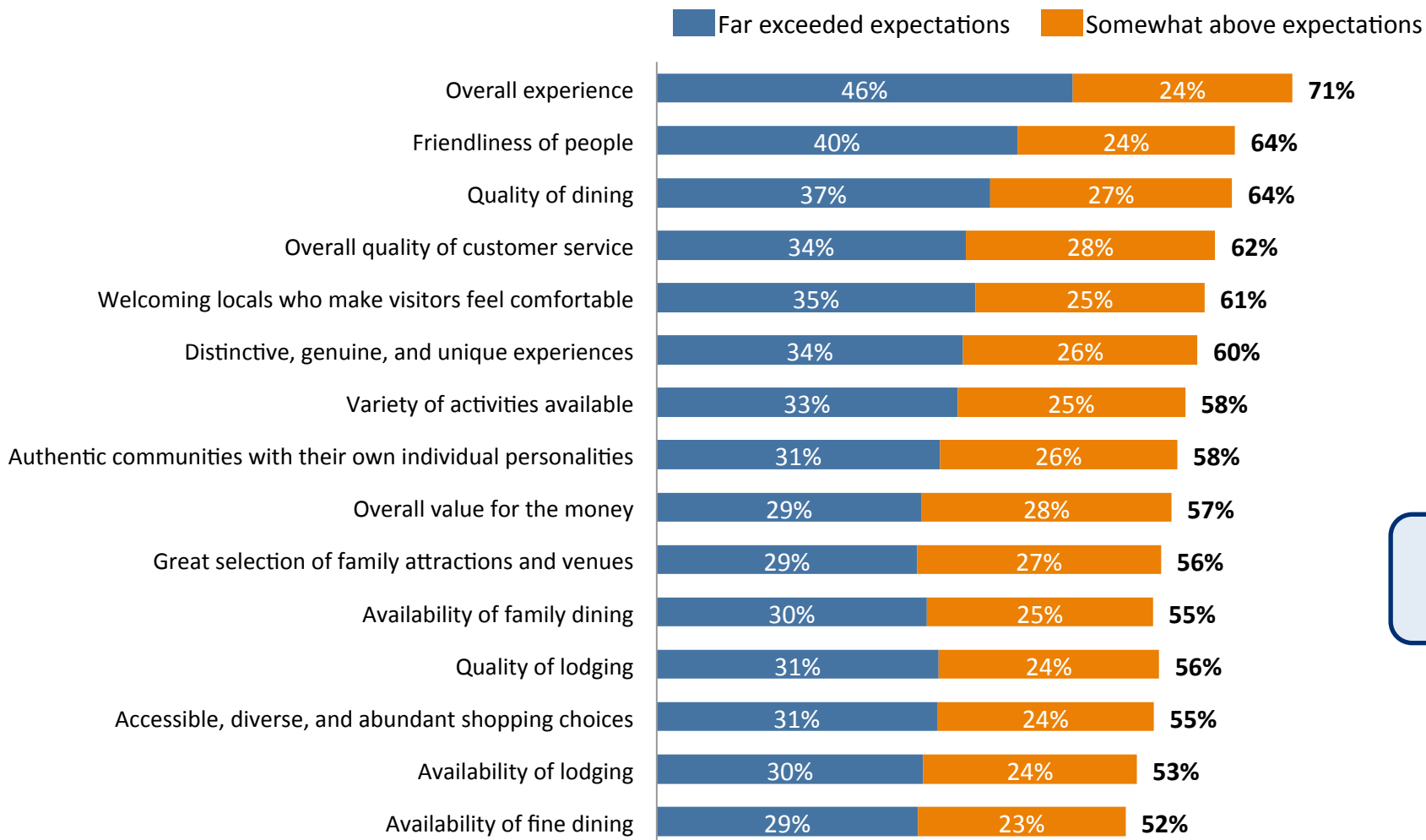


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# Trip Evaluation

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# Nearly three-fourths of summer overnight visitors found their *overall experience* visiting Maine to have exceeded their expectations.



Overnight  
Visitors  
[n=1,323]

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.



## Visitor satisfaction remains at the high levels reported in the summer of 2015 and even increased on measures related to the *quality of dining and family activities*.

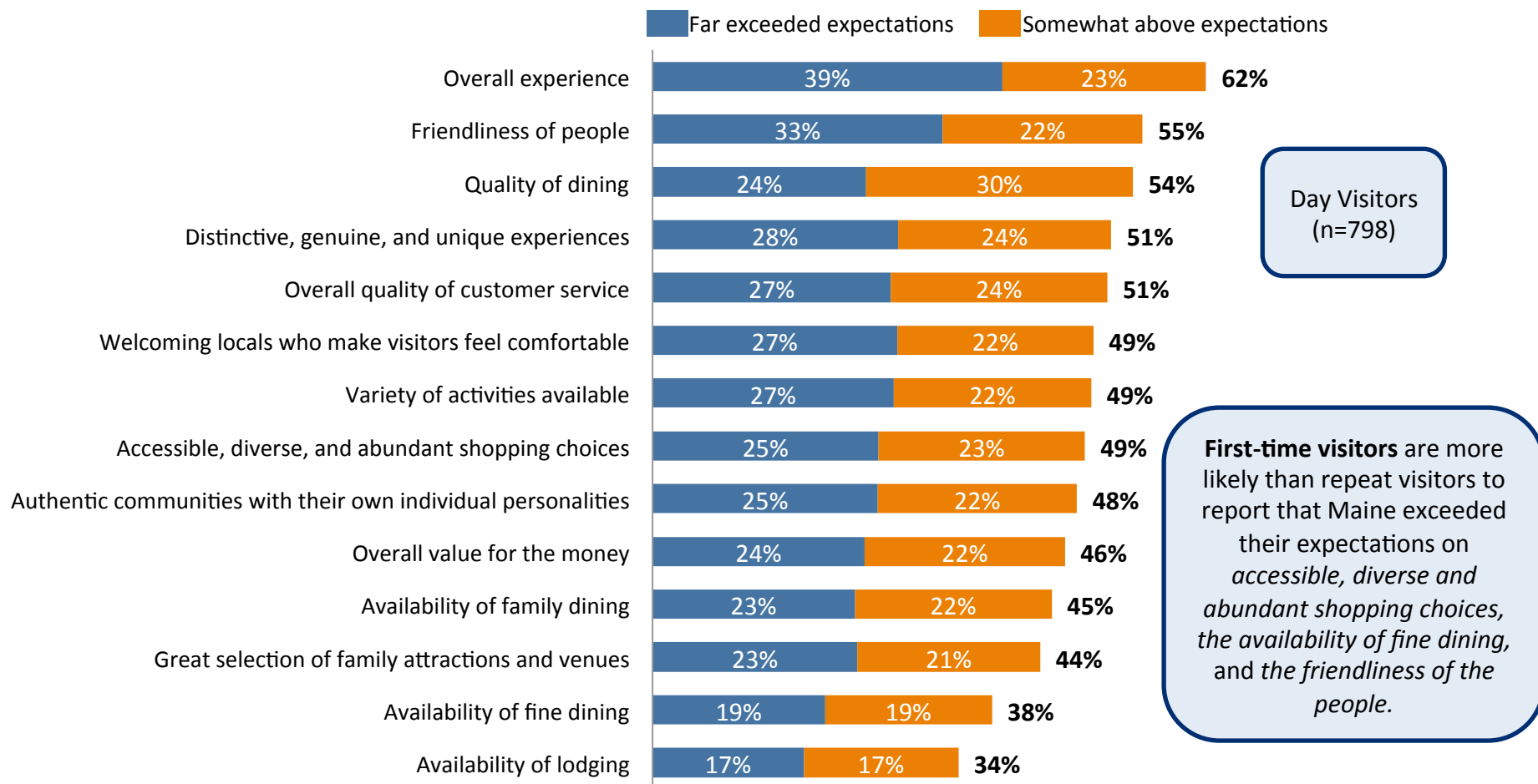
	Top 2 Box 2015 [n=1,281]	Top 2 Box 2016 [n=1,323]
Overall experience	70% p	71%
Friendliness of people	64% p	64%
Quality of dining	59% p	64% p
Overall quality of customer service	60% p	62%
Welcoming locals who make visitors feel comfortable	59% p	61%
Distinctive, genuine, unique experiences	57% p	60%
Variety of activities available	55% p	58%
Authentic communities with their own individual personalities	56% p	58%
Overall value for the money	54% p	57%
Great selection of family attractions/ venues	50% p	56% p
Availability of family dining	49% p	55% p
Quality of lodging	52%	56%
Accessible, diverse, abundant shopping choices	51% p	55%
Availability of lodging	50% p	53%
Availability of fine dining	51% p	52%

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.

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## Similar to overnight visitors, *overall experience* and the *friendliness of people* were the items that most exceeded summer day visitors' expectations.

- Compared to U.S. visitors, Canadians are more likely to indicate that their trip in Maine exceeded their expectations on *accessible, diverse and abundant shopping choices*, as well as *availability of fine dining*.



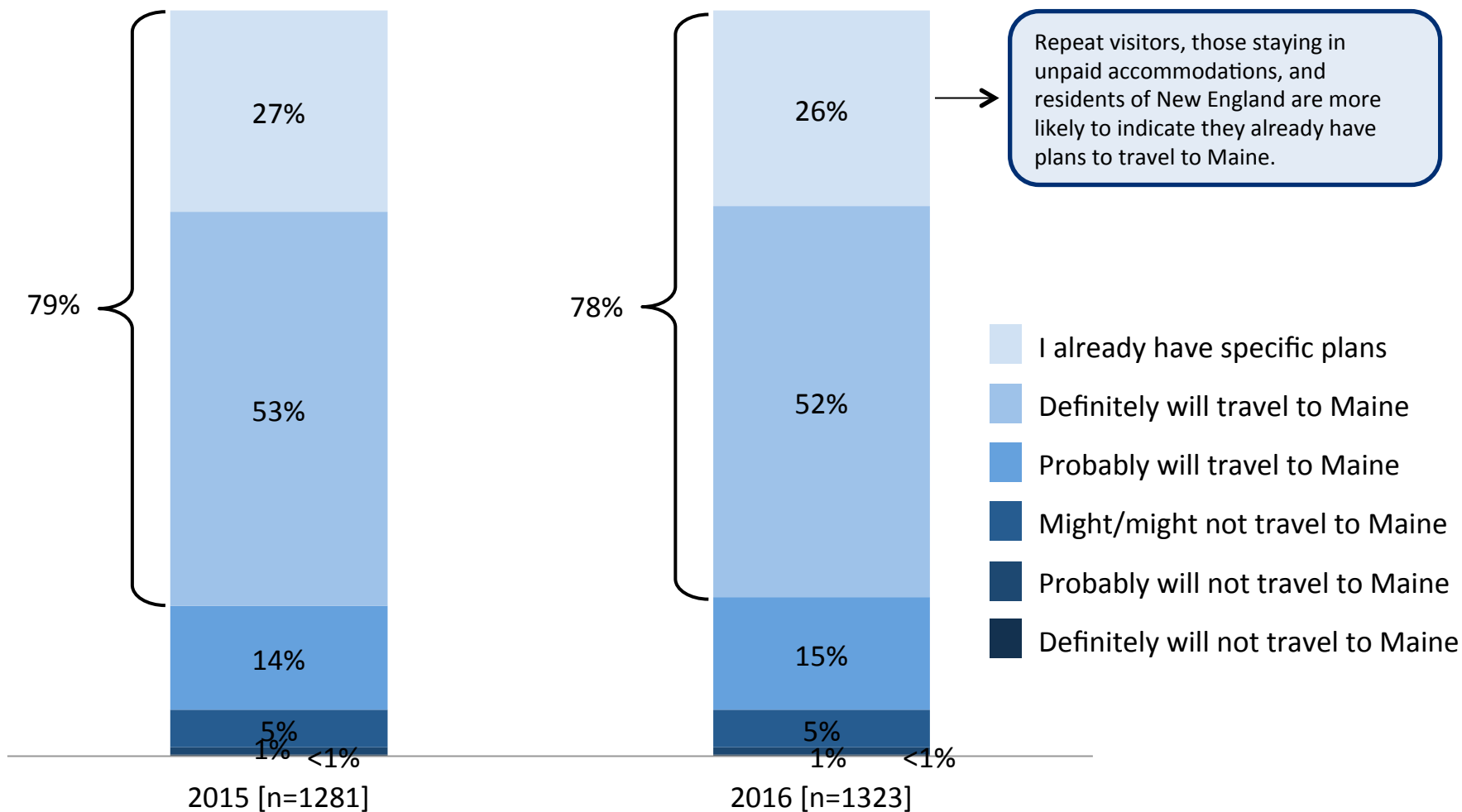
Day Q28: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

# Future Travel

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# Eight in ten overnight summer visitors say they already have specific plans to visit Maine or definitely will visit in the next two years.

Likelihood of Trip to Maine in Next Two Years

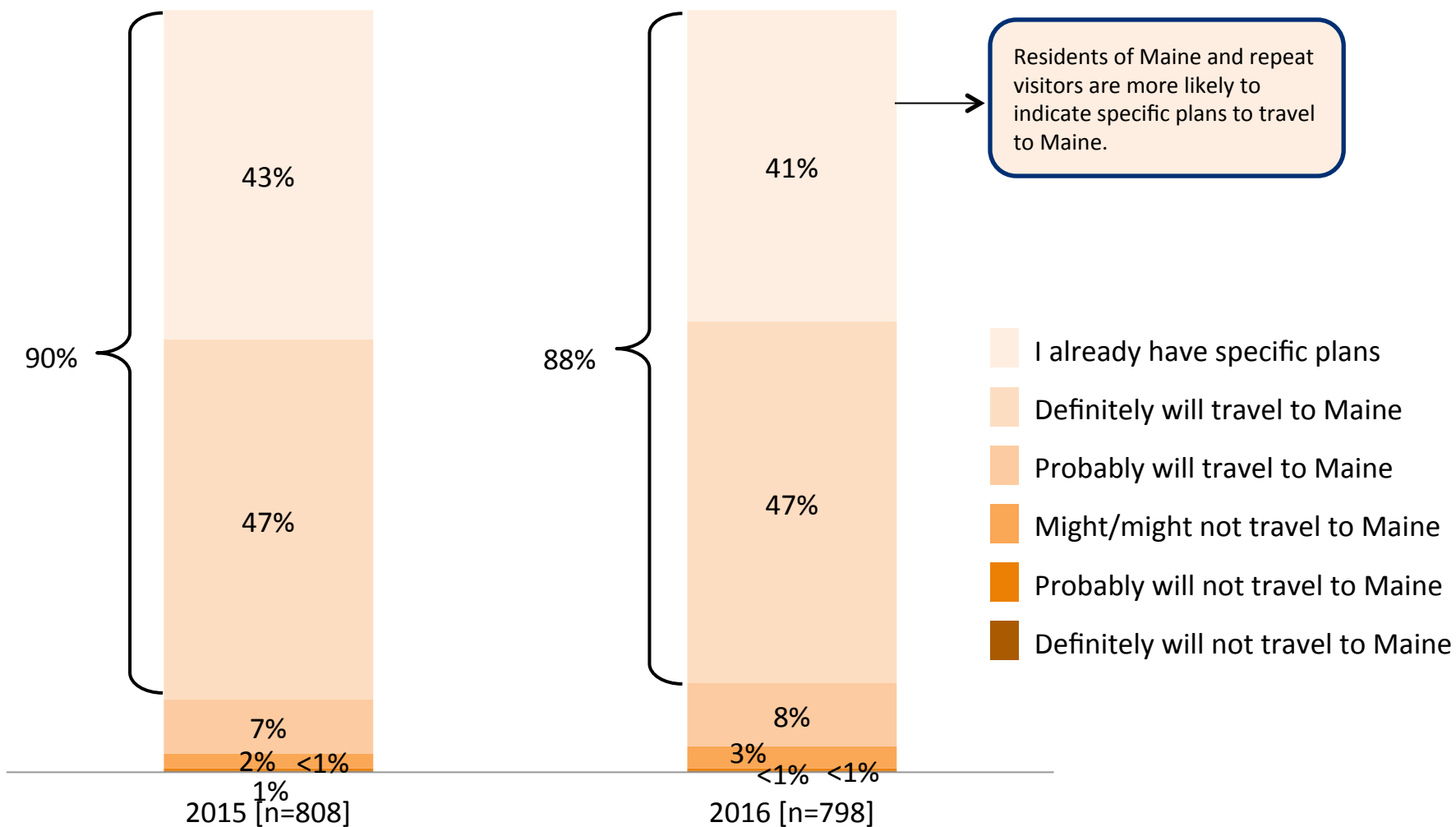


Overnight Q41. How likely will you be to travel in Maine in the next two years?

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In contrast, nine in ten summer day visitors either have specific plans to return to Maine or indicate they definitely will visit again.

### Likelihood of Trip to Maine in Next Two Years

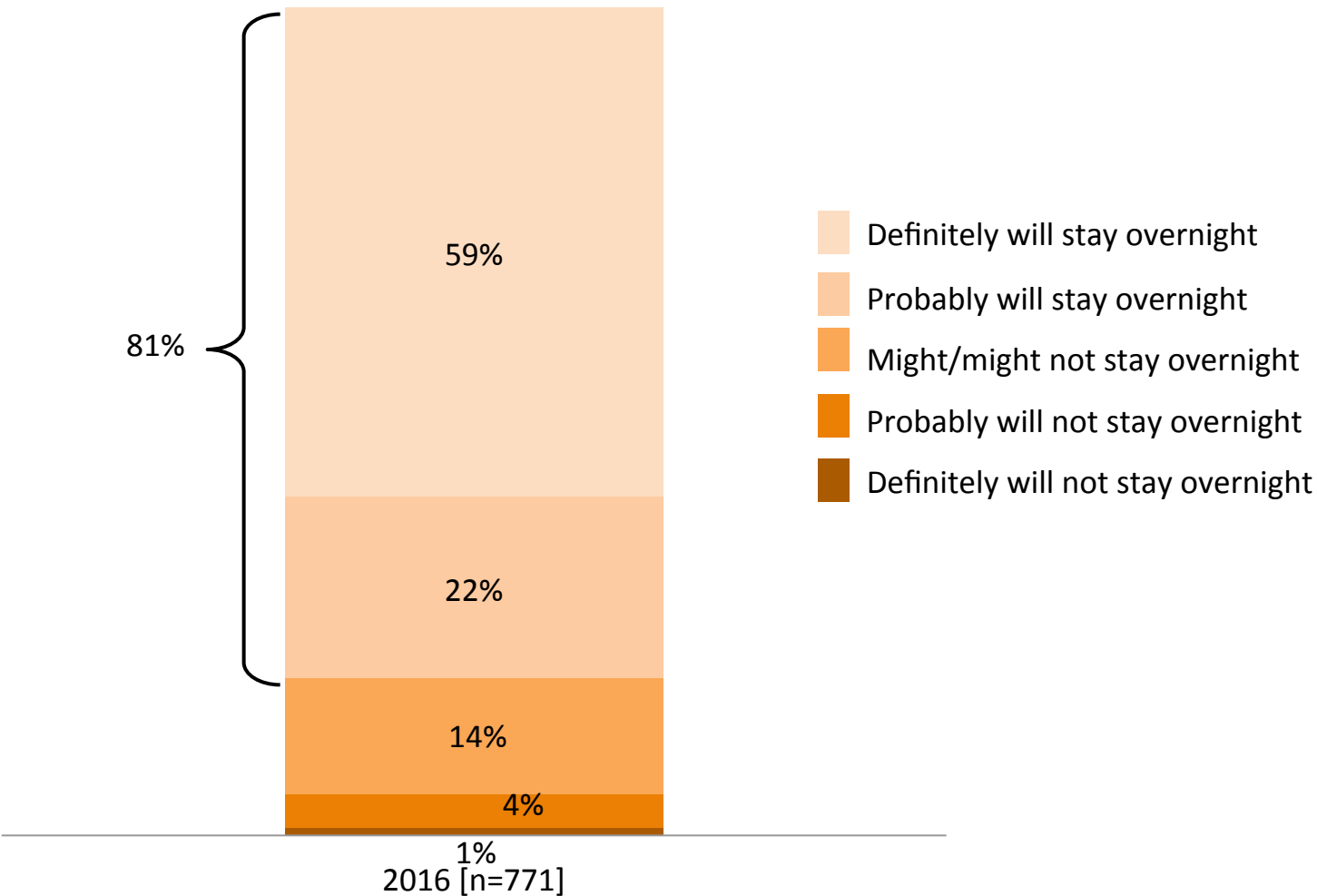


Day Q31. How likely will you be to travel in Maine in the next two years?

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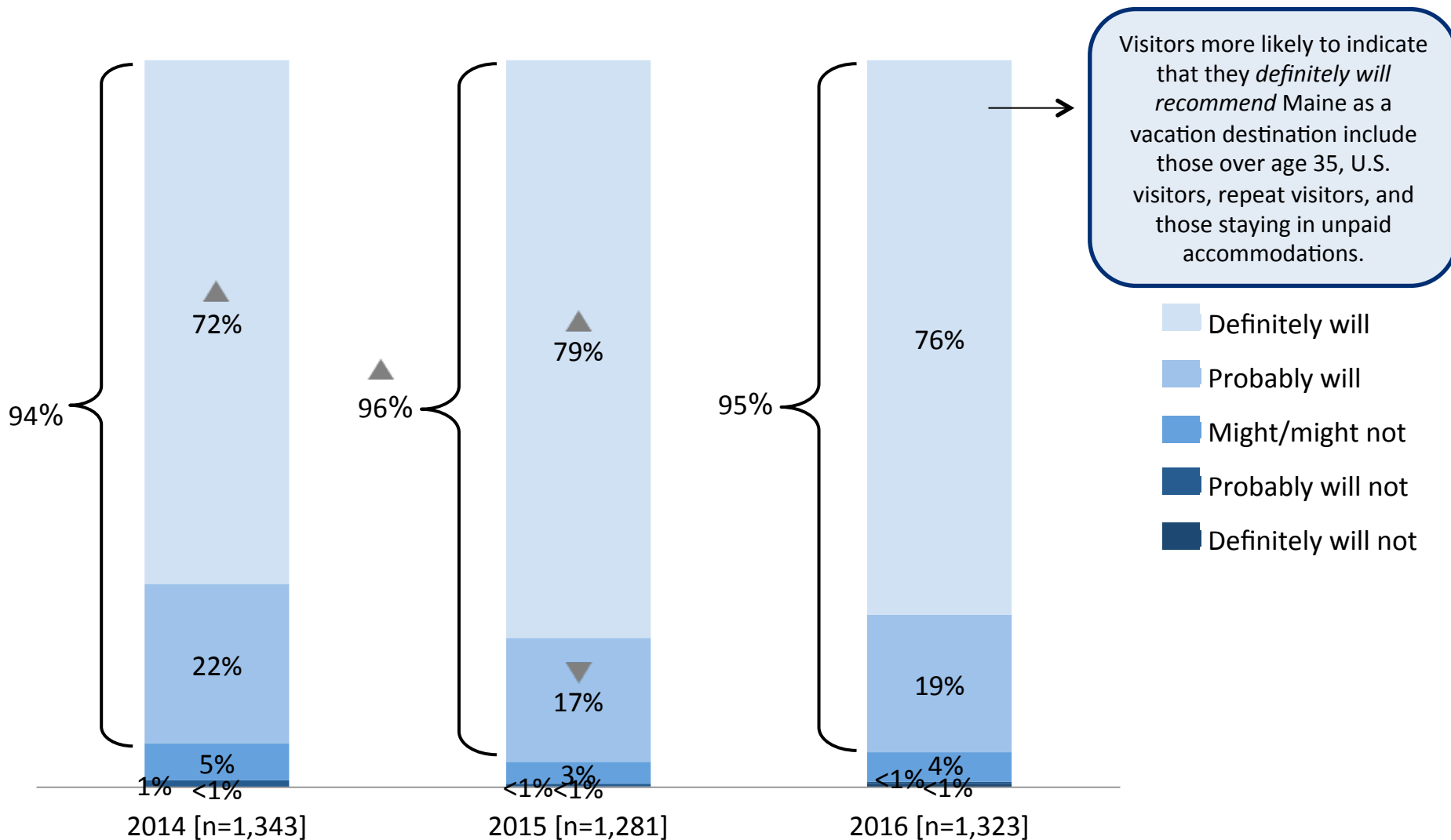
# Four in five day visitors who are likely to visit Maine again in the next two years say they *definitely or probably will stay overnight* when they visit.

### Likelihood of Staying Overnight in 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?

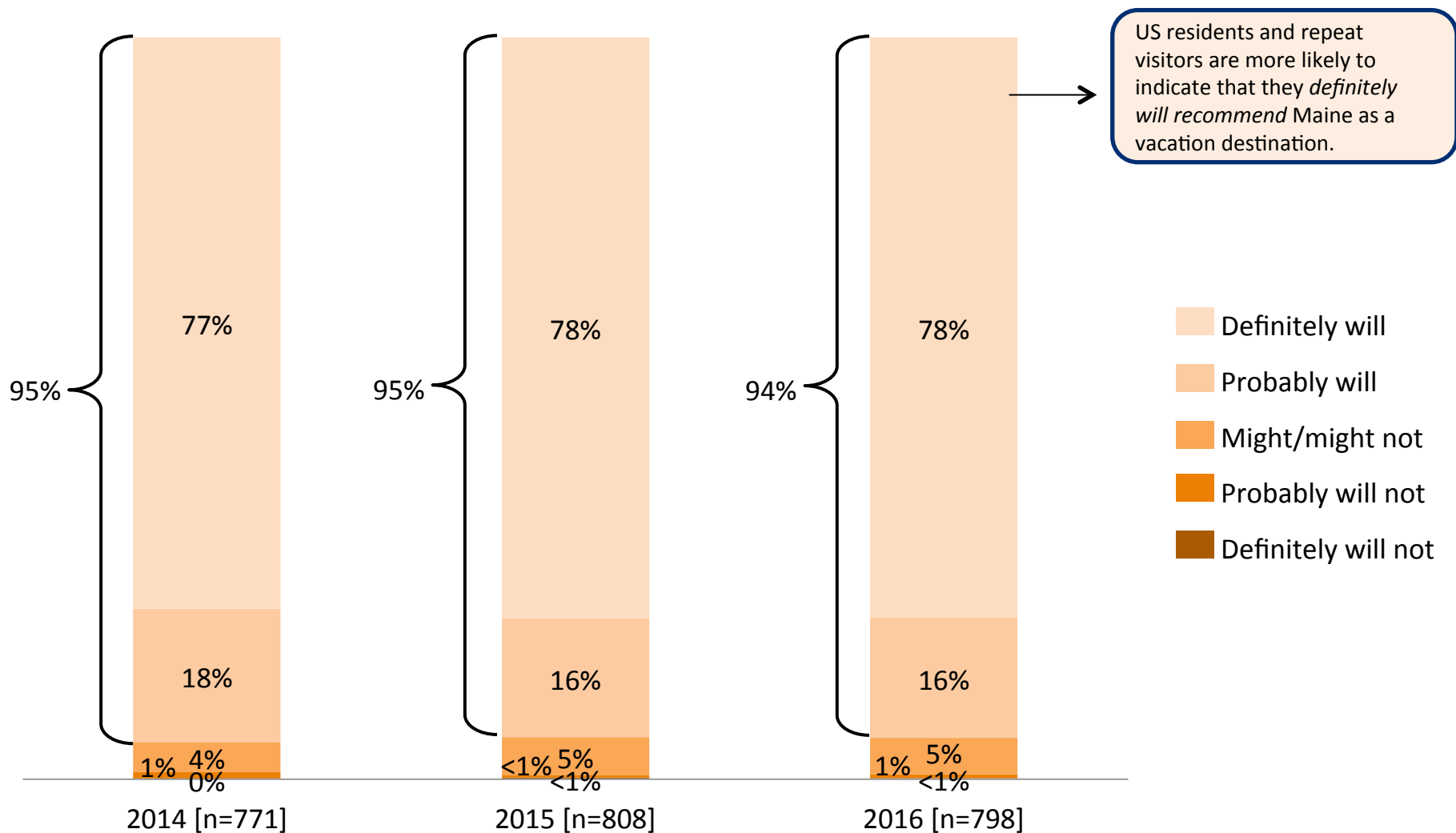
# Overnight visitors overwhelmingly indicate a likelihood to recommend Maine as a vacation destination to friends and relatives.



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

pq notes significant difference between the current and prior year at the 95% confidence level

# Day visitors are equally enthusiastic, with nearly all indicating a likelihood to recommend Maine as a vacation destination.



Day Q33: How likely are you to recommend Maine as a vacation destination to friends or relatives?  
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