

Maine Office of Tourism Visitor Tracking Research

Winter 2016 Seasonal Topline

Prepared by



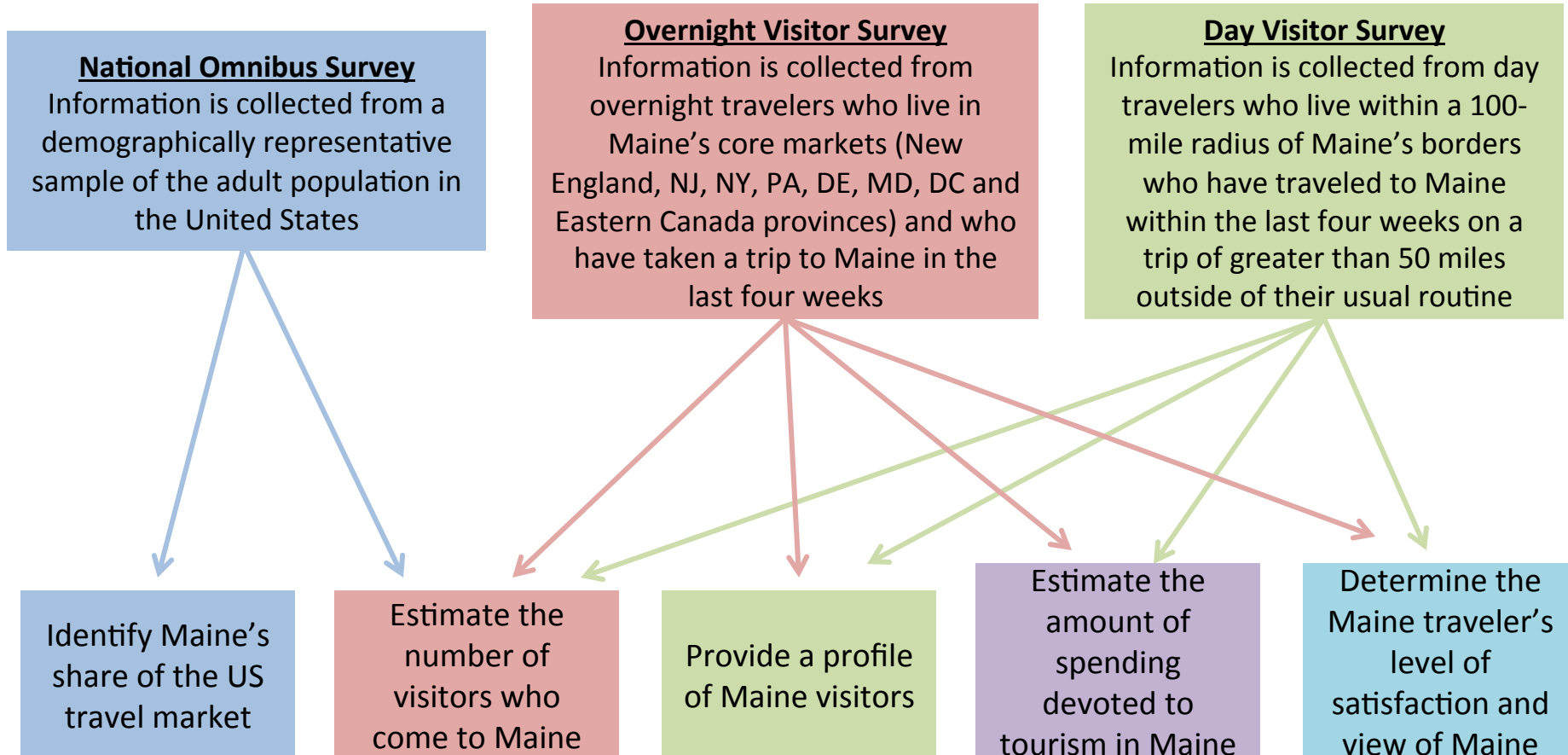
June 2016

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.



Note: Winter season includes visits to Maine from December 2015 through April 2016.

Executive Summary



Executive Summary

Please note that the results provided in this seasonal summary are preliminary and reflect visitation from December 2015 through April 2016. At the conclusion of the 2016 travel reporting season (December 2016), adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

- For the second year in a row, winter season travel nationwide has shown growth, after having been relatively stable for the prior few winters. This increase was seen in all types of travel – leisure, VFR, and business.
- Despite the less favorable conditions for Maine’s winter sports this year, Maine also experienced an increase 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. However, winter day visitation was relatively flat when compared to the prior winter season. As a result, overall tourism-related visitation to Maine (overnight and day) increased 4% from Winter 2015 to Winter 2016, continuing several years of year-over-year growth in visitation.

Executive Summary

- Despite the continued decline of the Canadian exchange rate, the proportion of Canadians visiting Maine during the 2016 Winter season was about even with the 2015 Winter season. Since 2013, Maine had experienced a downward trend in the proportion of Canadians visiting the State, directly following the decline of the Canadian exchange rate. It appears as though the proportion of Canadians visiting Maine has not shown any additional drops in the past two Winter seasons, suggesting that the impact of the low exchange rate on Canadian visitation may have stabilized.
- Well known for its summer beach opportunities, the Maine Beaches region once again attracted the greatest proportion of both overnight and day visitors to Maine during the Winter 2016 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

- Following two consecutive years of growth in the incidence of first-time visitors coming to Maine, the Winter 2016 season brought in about the same proportion of first-time visitors as did the Winter 2015 season. The continued successful introduction of Maine to new visitors is vital to 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.
- Maine receives extremely favorable evaluations from its visitors, with the highest ratings centering on visitors' overall experience and the service and friendliness of the Maine people.
 - Three-fourths of Winter overnight visitors stated that their vacation exceeded their expectations for *friendliness of the people*, and two-thirds responded similarly regarding *overall quality of customer service* and *welcoming locals who make visitors feel comfortable*.
 - Nearly two-thirds of day visitors felt similarly about the *friendliness of the people* and the *overall quality of customer service*, while somewhat fewer felt this way regarding *welcoming locals who make visitors feel comfortable*.

Executive Summary

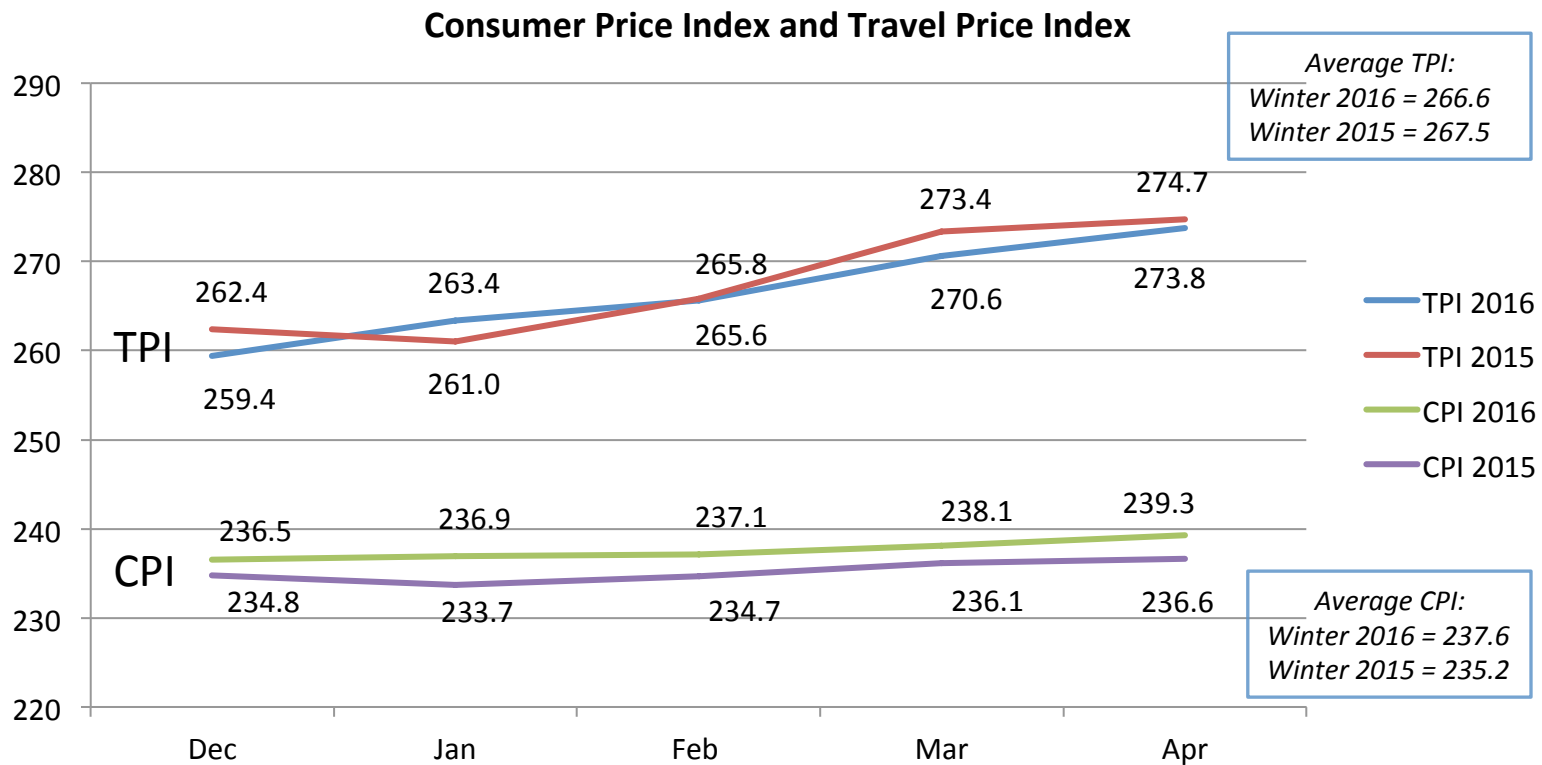
- A significant outcome of tourism in Maine is that travelers have a high propensity to return again as well as spread positive word-of-mouth about Maine to their friends and family.
 - Three in ten overnight winter visitors *already have plans to visit Maine* again in the next two years, and more than 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, 84% of Maine's overnight visitors and 77% of day visitors say that they *definitely will recommend Maine* as a vacation destination to friends or relatives.

2016 Winter Season Travel Context



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

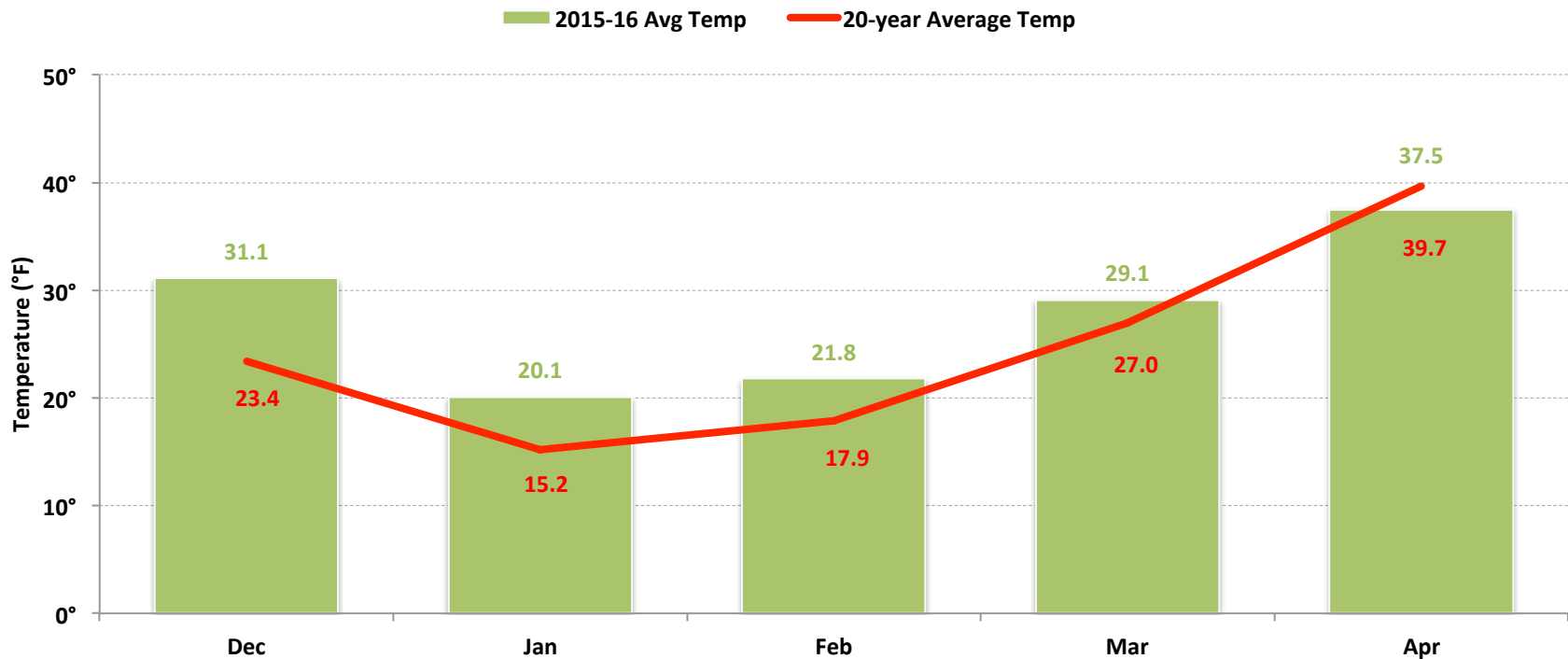
- However, the Winter 2016 TPI Index for most months came in either equal to or lower than the Winter 2015 Index, while the Consumer Price Index came in higher than the previous year’s Winter season. This same pattern was evident during the Summer and Fall 2015 seasons, and may signal a potential drop in the relative cost of travel as compared to other goods.



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

With the exception of April, temperatures during the Winter 2016 season were slightly higher than the 20-year average for the State.

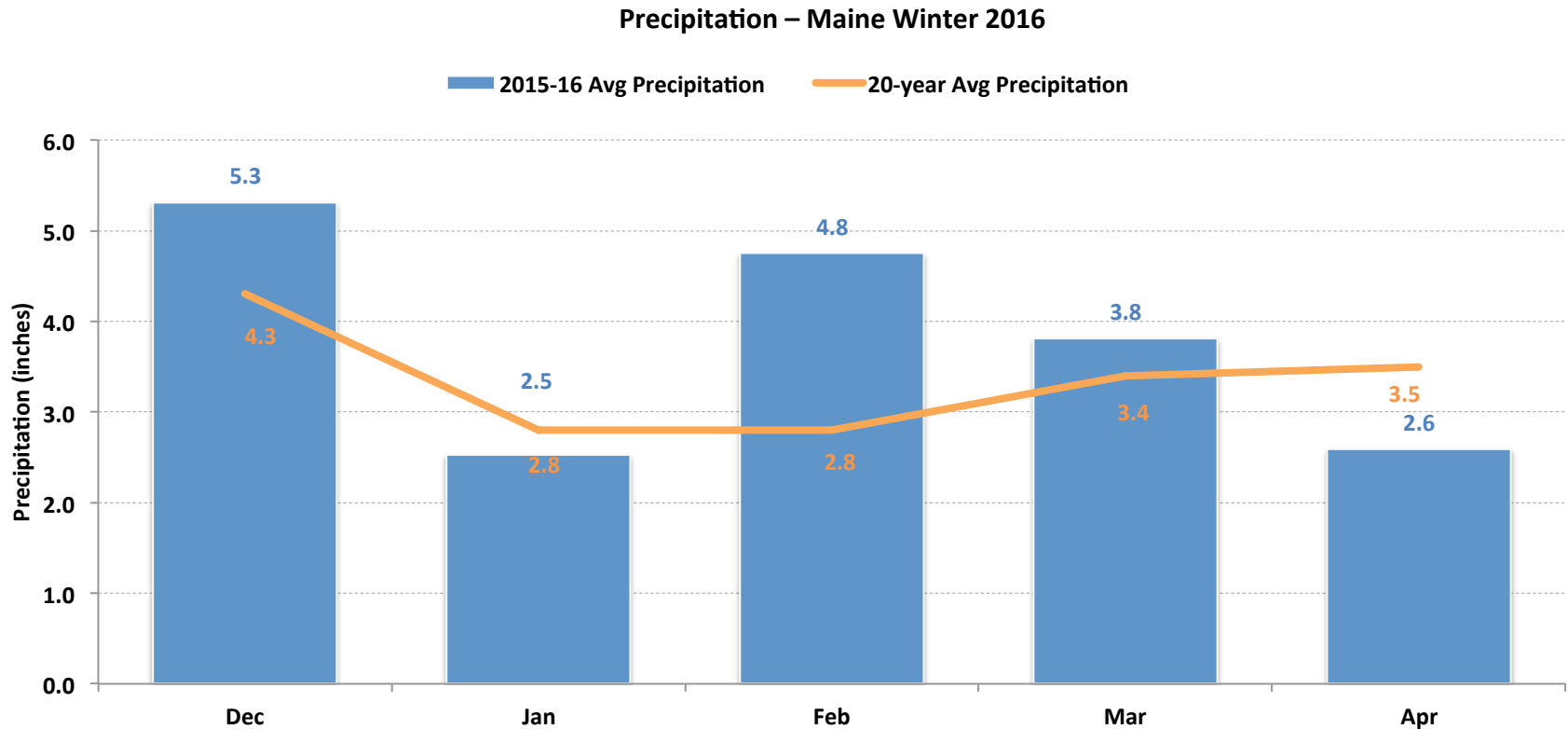
Temperature – Maine Winter 2016



Data source: NOAA.gov

Precipitation in Maine varied from the 20-year average during the winter months – some above and some below.

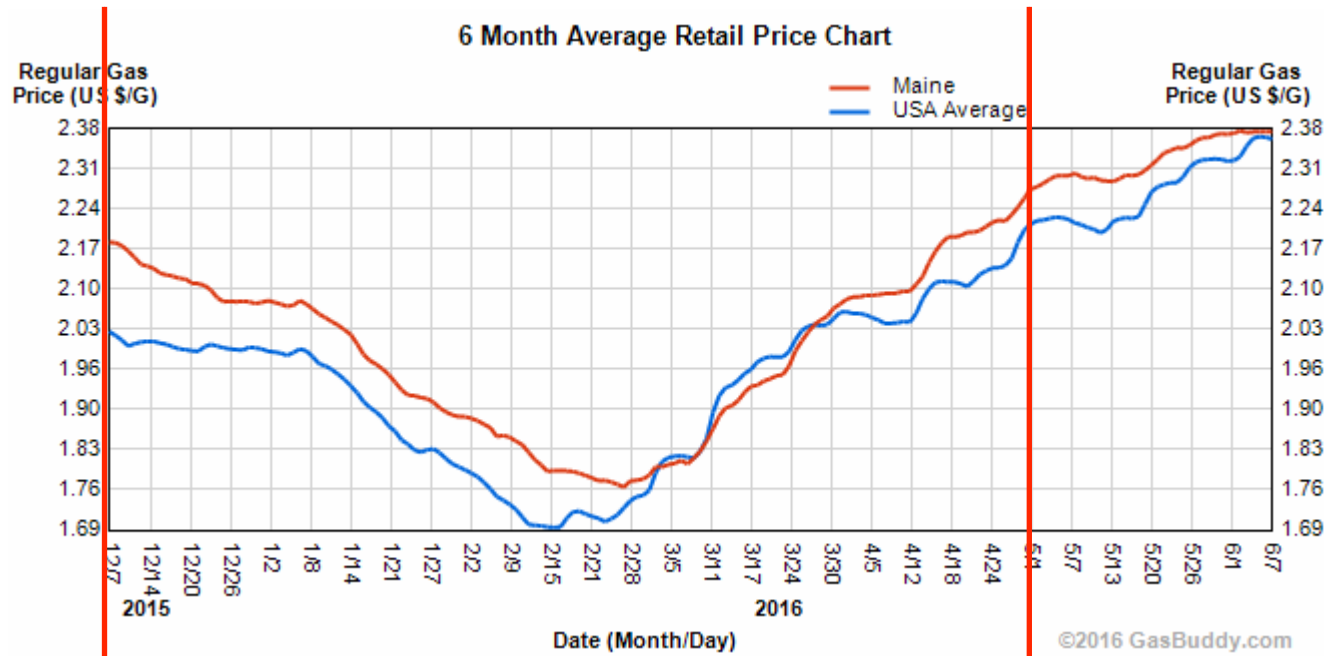
- This winter season brought higher than normal amounts of precipitation in December, February, and March, and lower than average amounts in January and April.



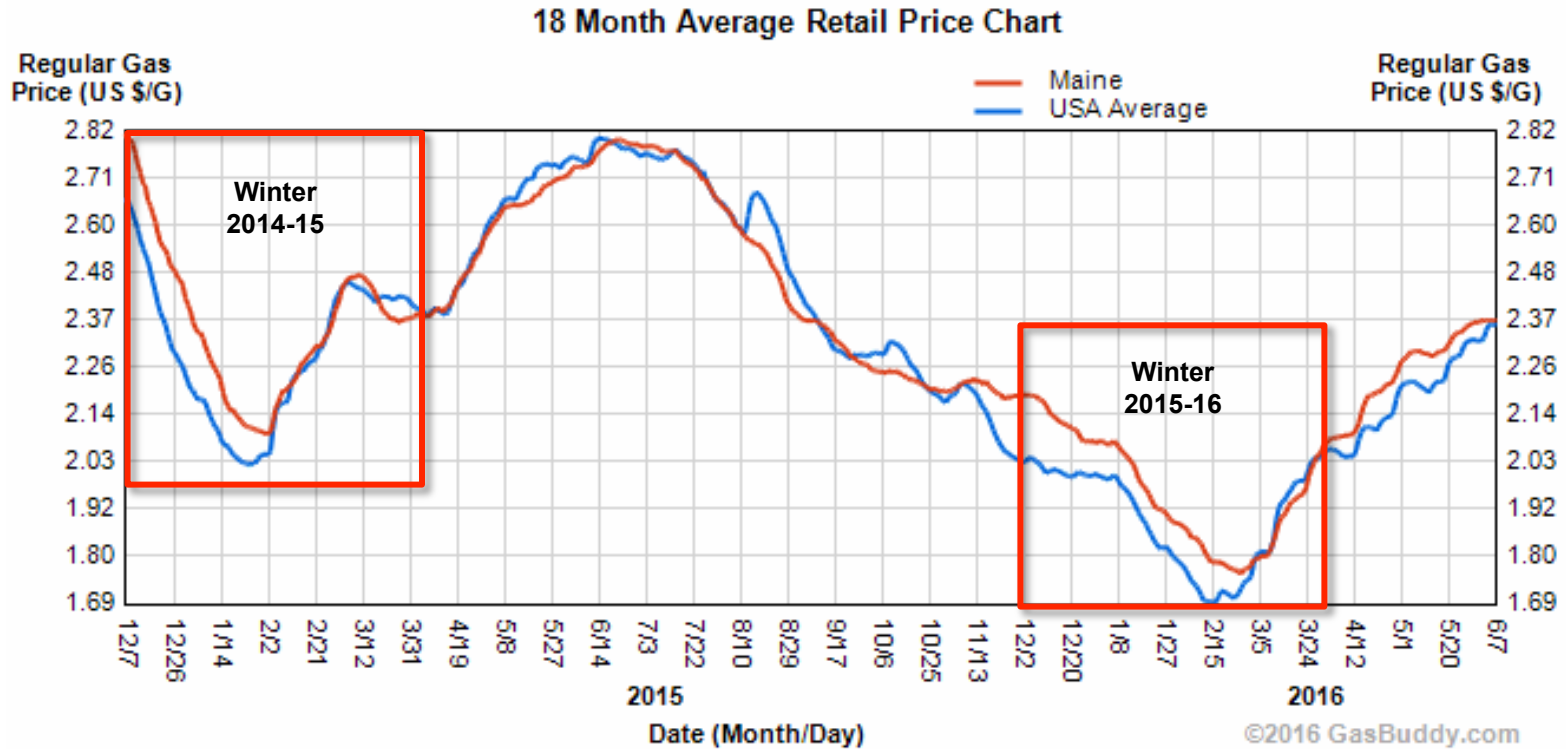
Data source: NOAA.gov

Maine gas prices surpassed average prices in the U.S. for most of the winter season, with the exception of the month of March.

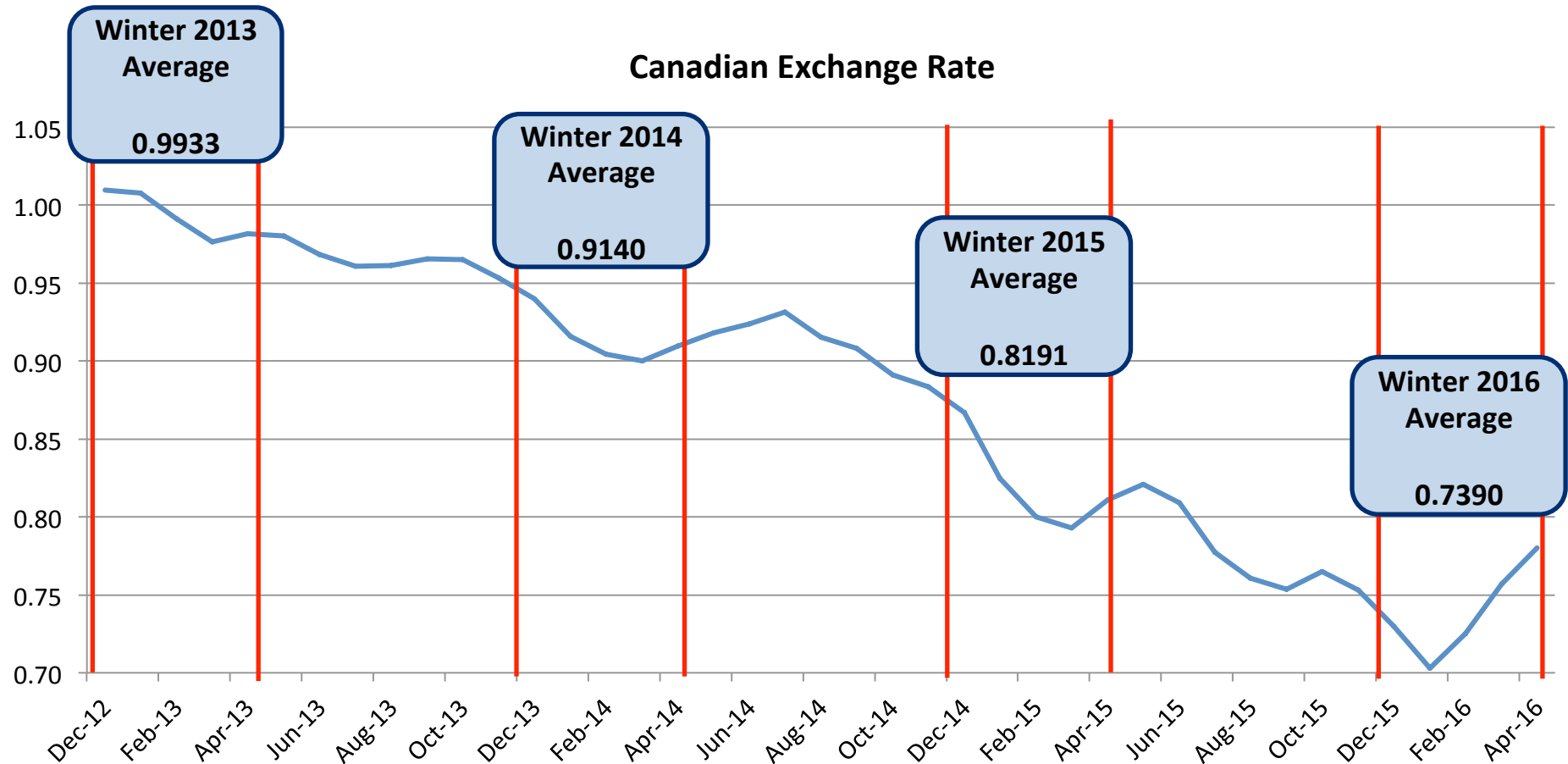
- The average price of gasoline in Maine during the winter of 2016 declined during the first part of the season, reaching its lowest level at the end of February. March and April, however, saw the beginning of an increase in the average price of gasoline both in Maine and nationwide.



Compared with the prior winter, gas prices in Maine and nationwide were lower during Winter 2016.

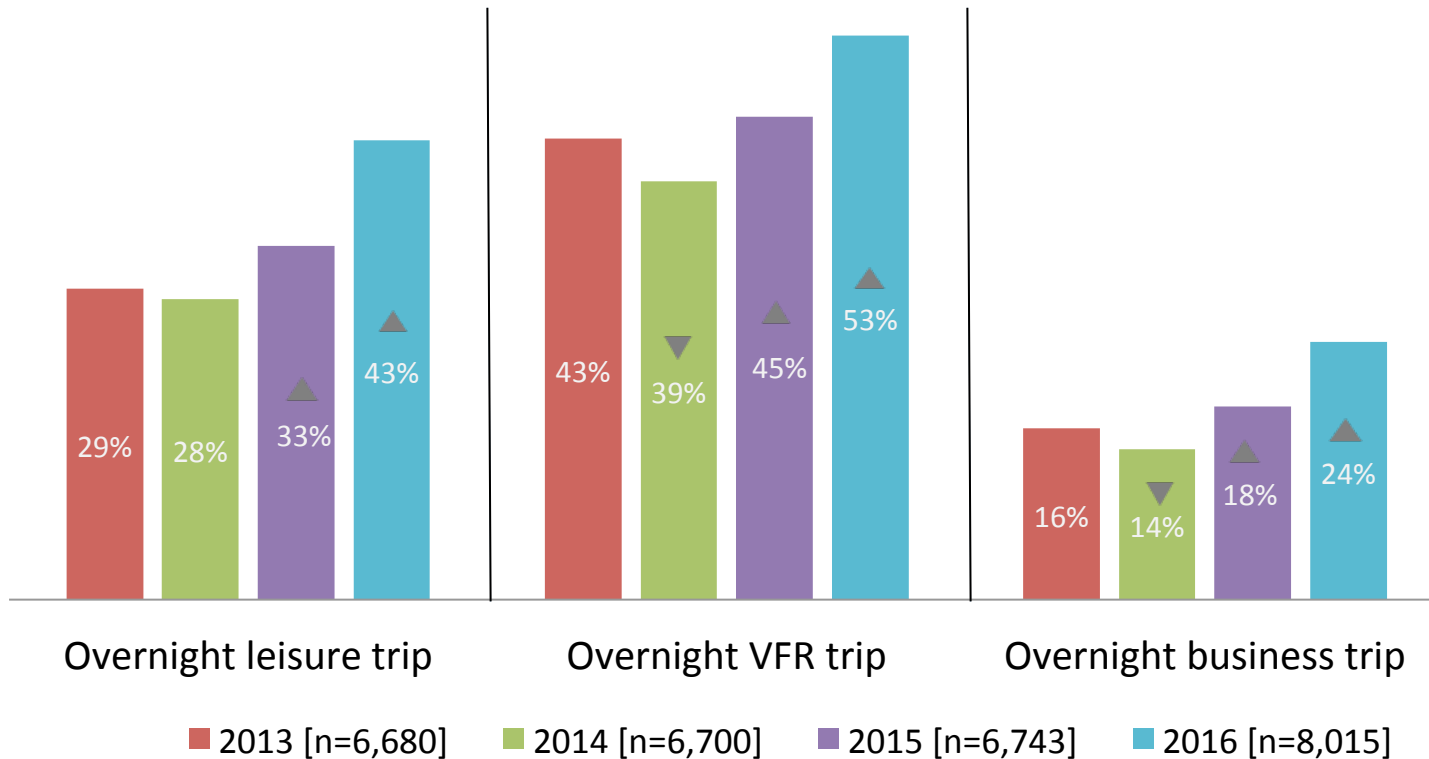


The Canadian exchange rate continued its decline, dropping to an unfavorable Winter 2016 average season rate of 0.74.



Following the trend seen in 2015, nationwide overnight travel showed an increase this winter season.

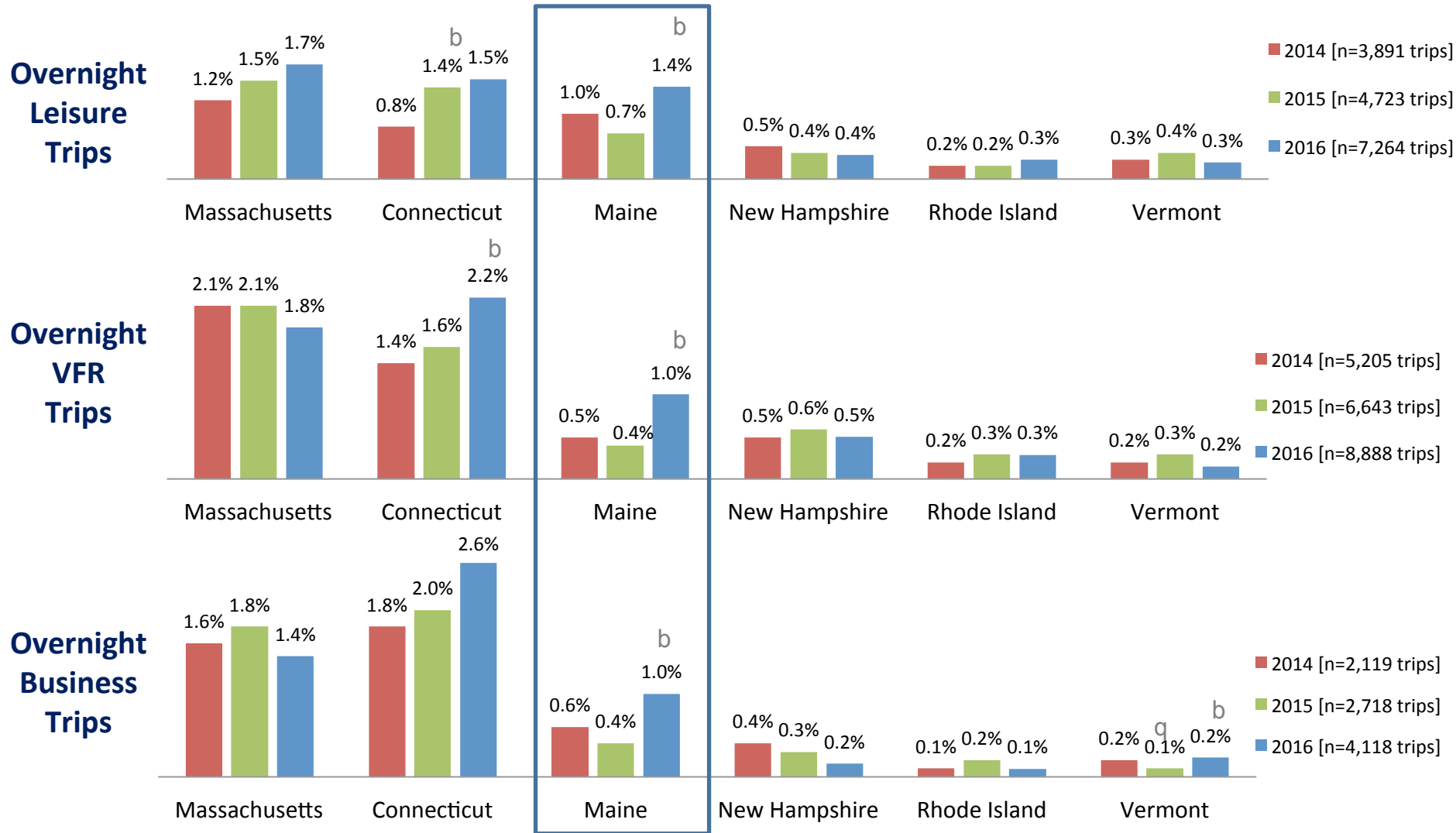
Proportion of U.S. Residents Taking a Trip During the Winter Season



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?

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

Maine's share of total overnight trips taken nationwide showed a year-over-year increase in all categories of travel.



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 from the prior year at the 95% confidence level

2016 Winter Season Highlights



Estimated visitation to Maine during the winter season increased 4% over the prior year.

- While overnight visitation is up nearly 7%, 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 2015 through April 2016. Adjustments will be made to these estimates in the Annual Report to account for seasonal fluctuations.

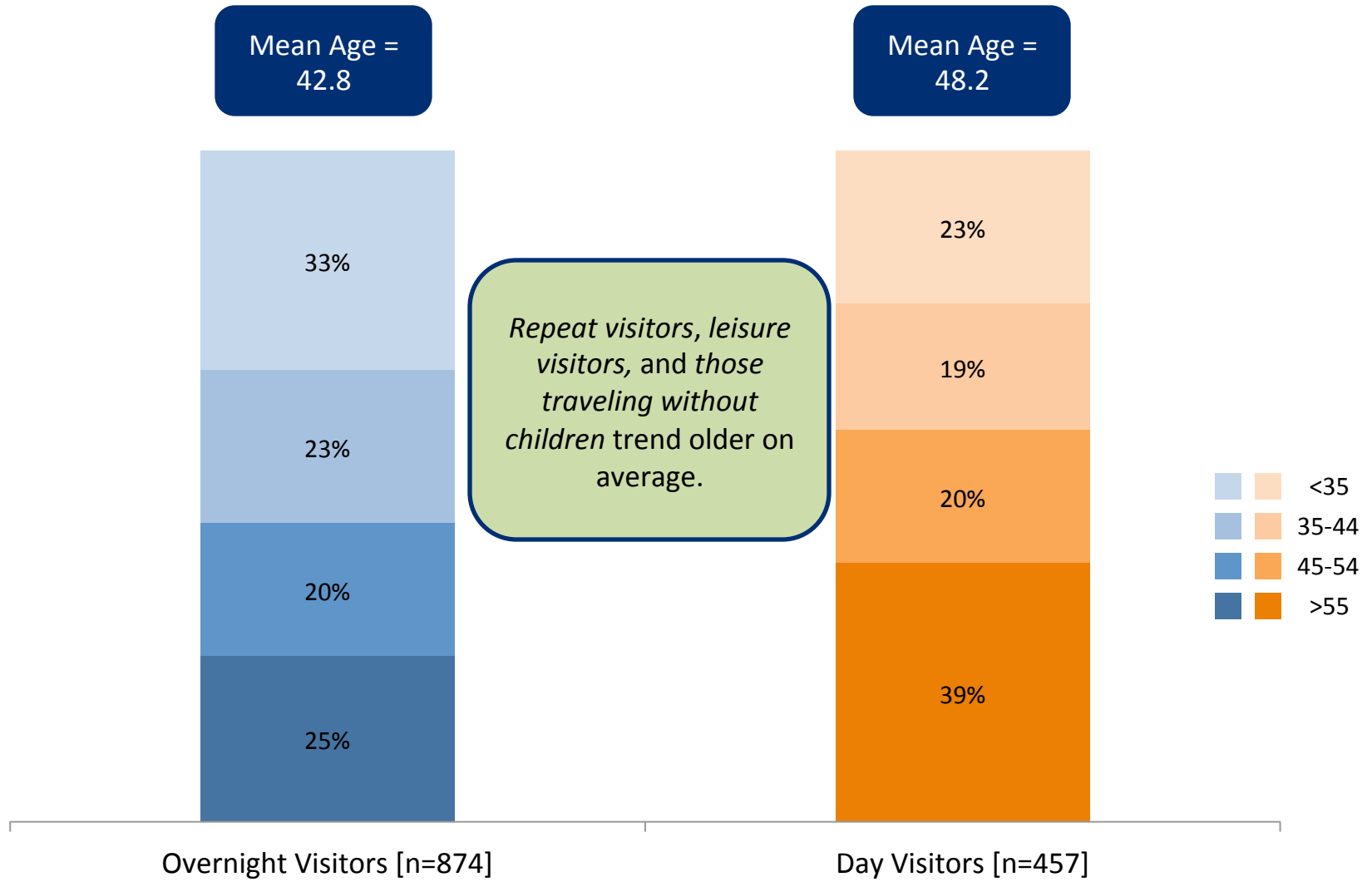
Visitation Estimates*	Winter 2015	Winter 2016	% Chg
Total Estimated Visitation	5,565,576	5,789,702	+ 4.0%
<i>Overnight Visitors</i>	<i>2,977,542</i>	<i>3,179,745</i>	<i>+ 6.8%</i>
<i>Day Visitors</i>	<i>2,588,034</i>	<i>2,609,957</i>	<i>+ 0.8%</i>

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

Tourism related trips include:

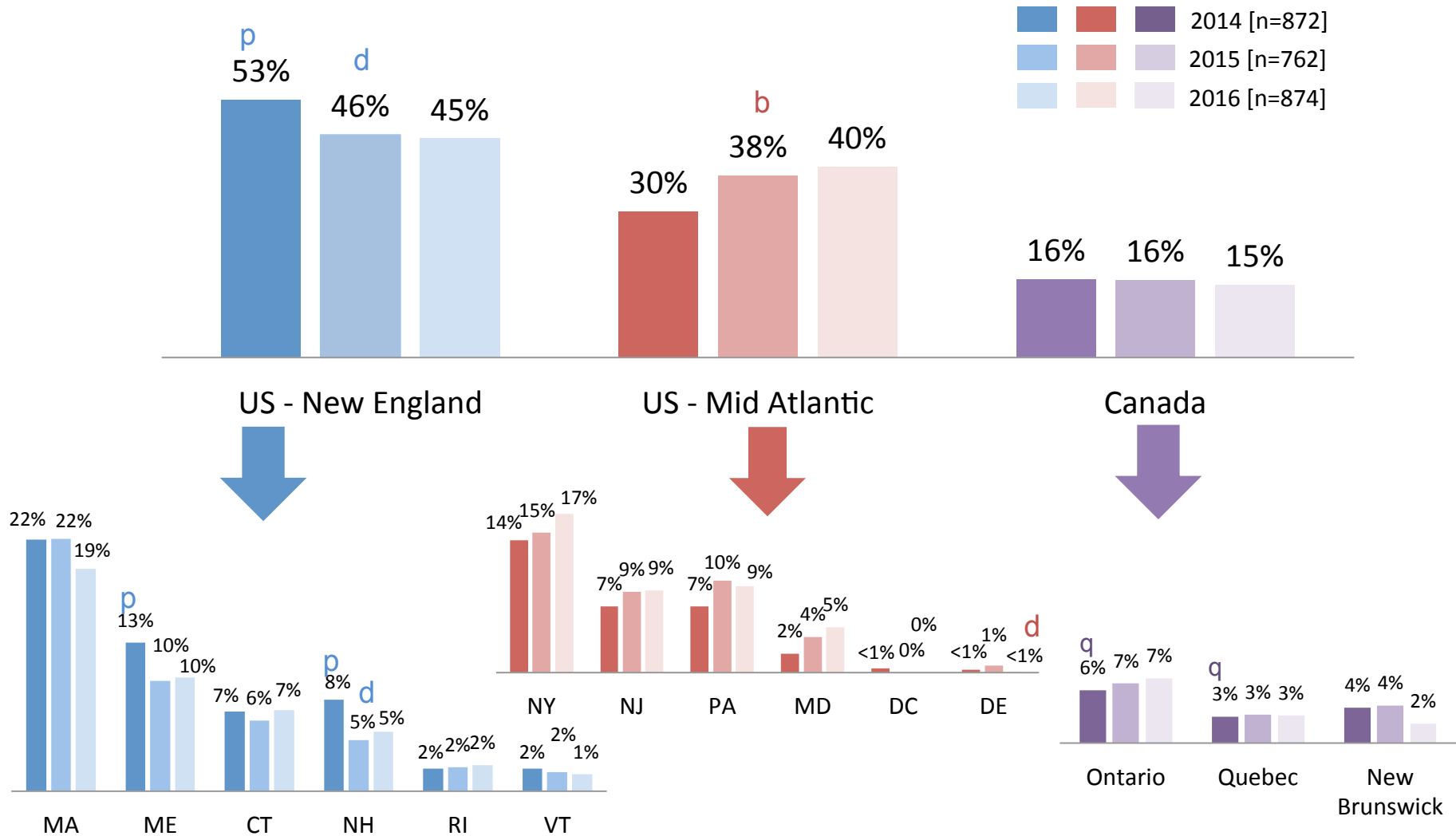
- All leisure trips.*
- VFR trips that are a general visit to see friends or relatives, a wedding, or a holiday visit.*
- Business trips that are for a convention/conference/trade show or training/professional development.*

Maine winter visitors are in their mid to late 40s, on average, with day visitors trending a bit older than overnight visitors.



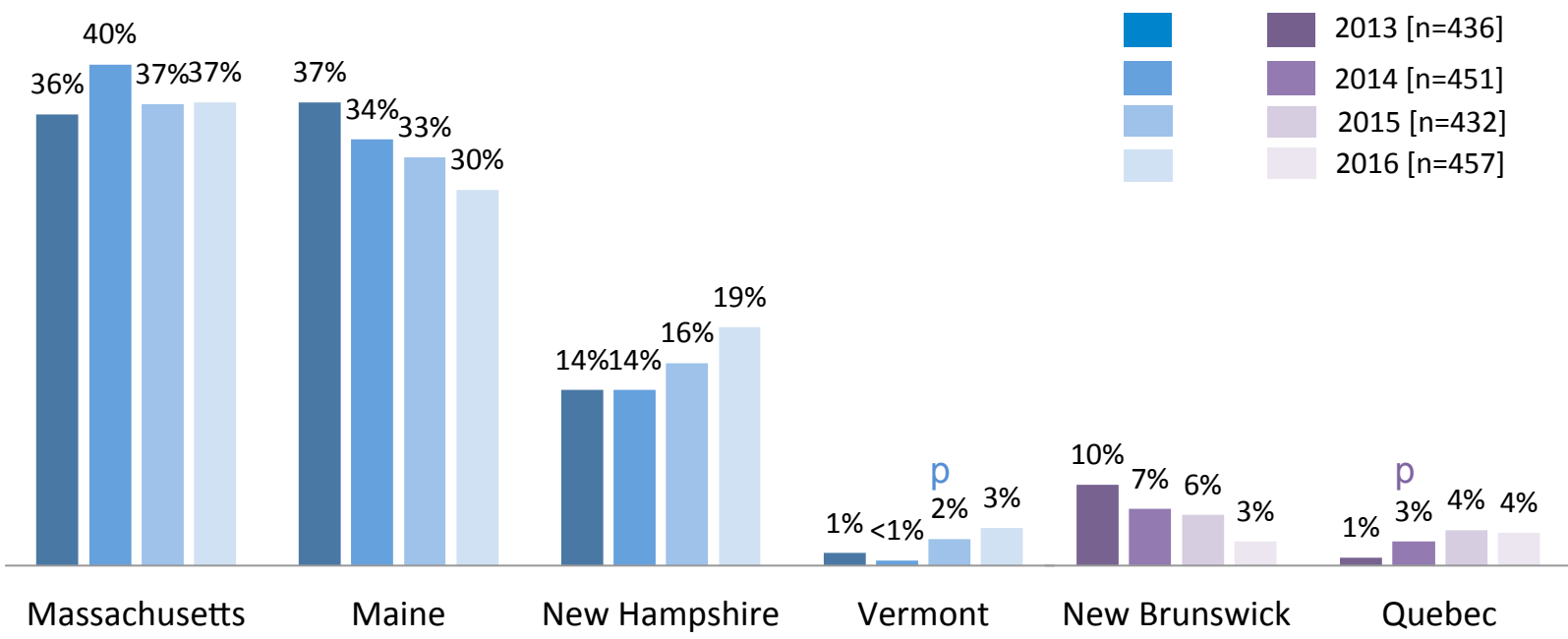
The proportions of overnight visitors arriving from New England, the Mid-Atlantic, and Canada this winter (2016) are consistent with the prior winter season (2015).

2016 Winter Season Topline
(Dec 2015 – Apr 2016)



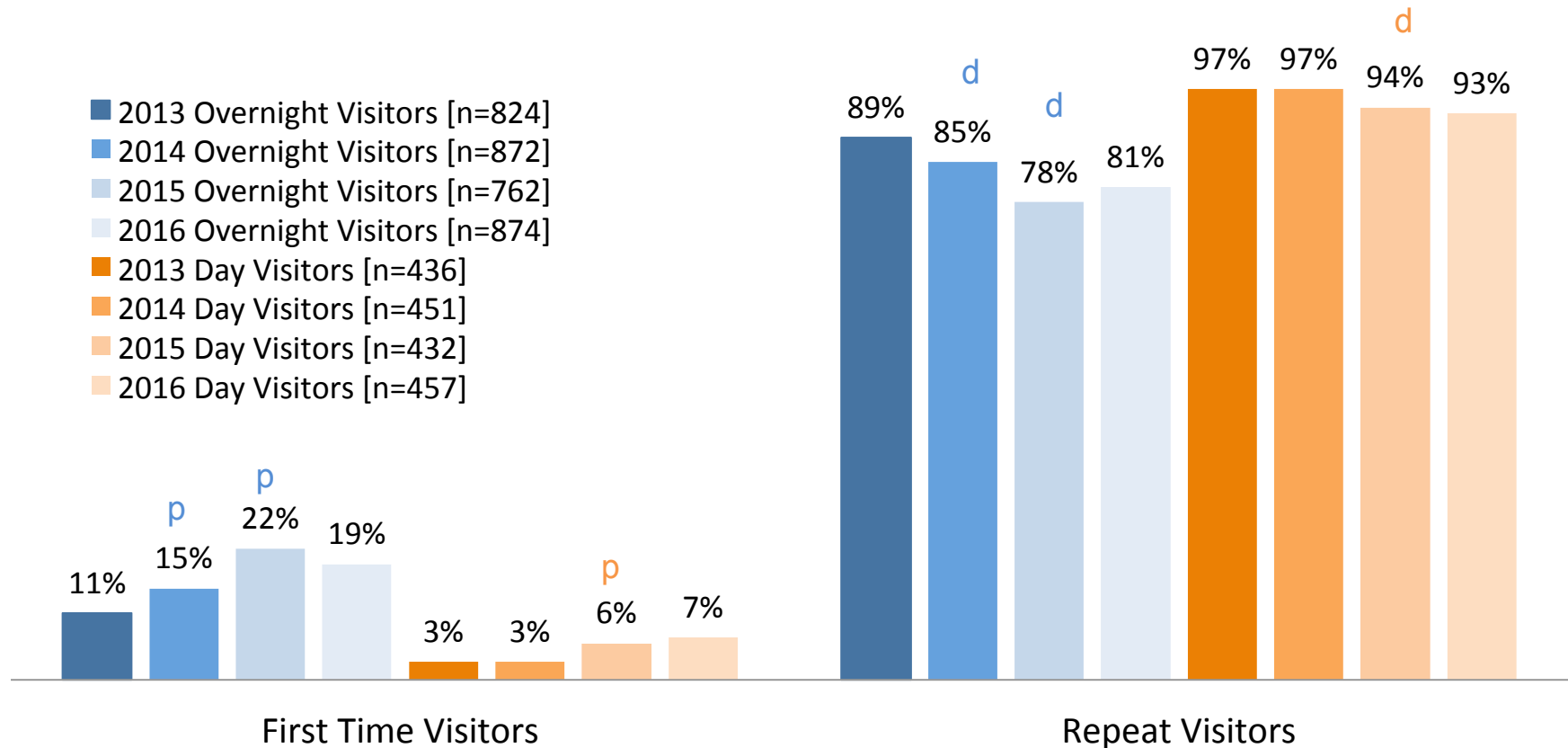
Massachusetts remains a leader in drawing the largest proportions of winter day visitors to Maine.

2016 Winter Season Topline
(Dec 2015 – Apr 2016)



The 2016 winter season is comparable to the prior winter season in the proportion of first-time visitors.

- Visitors arriving from outside of New England are more likely to be visiting Maine for the first time, as are younger visitors and those traveling with children.

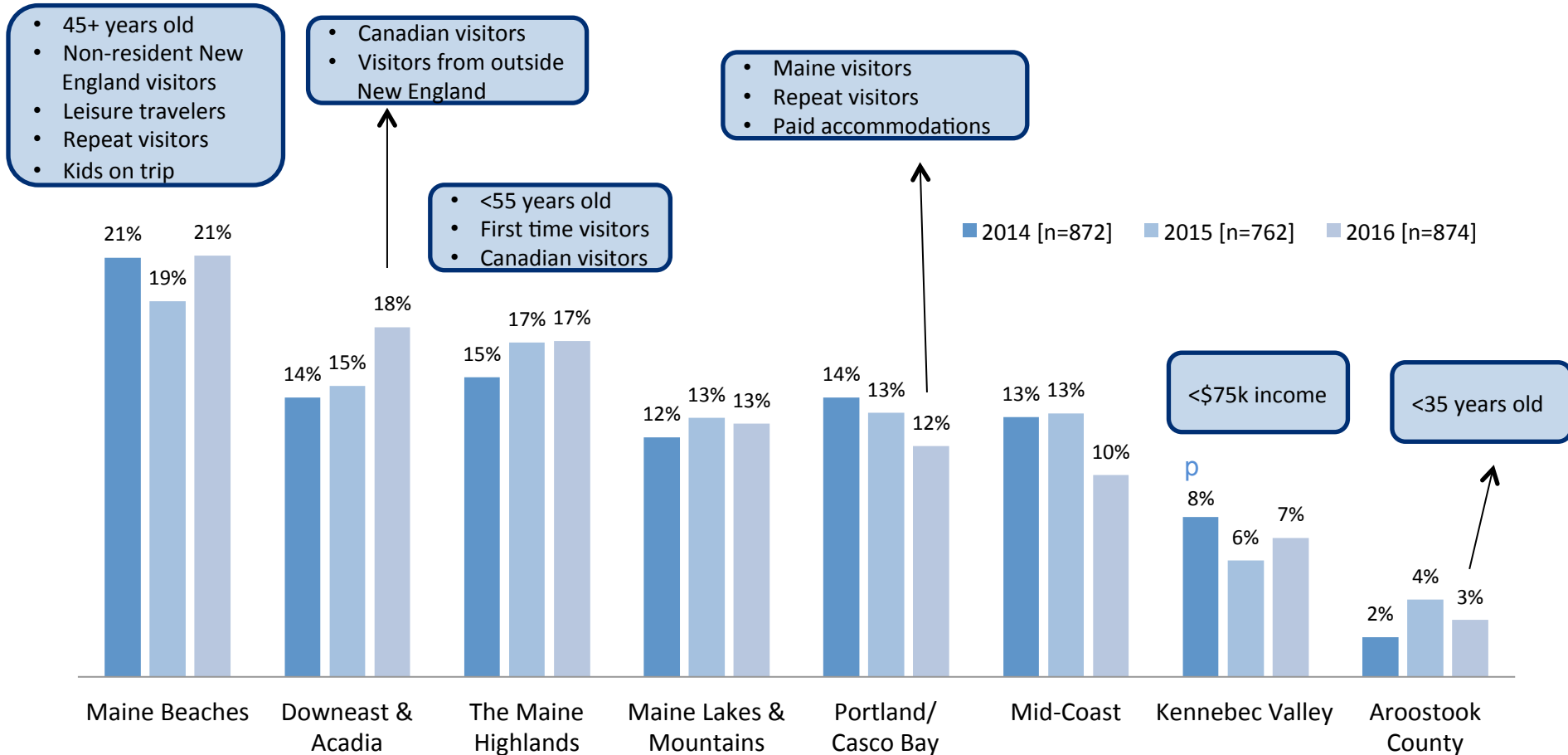


Overnight Q11, Day Q10. Was this your first visit to Maine?

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

Winter overnight visitation in 2016 is spread out across several regions, with most visitors traveling to the Maine Beaches, the Downeast/Acadia region, and the Maine Highlands.

- The sub-groups of overnight visitors in 2016 that are more likely to visit some of Maine’s tourism regions are illustrated in the boxes in the chart below.

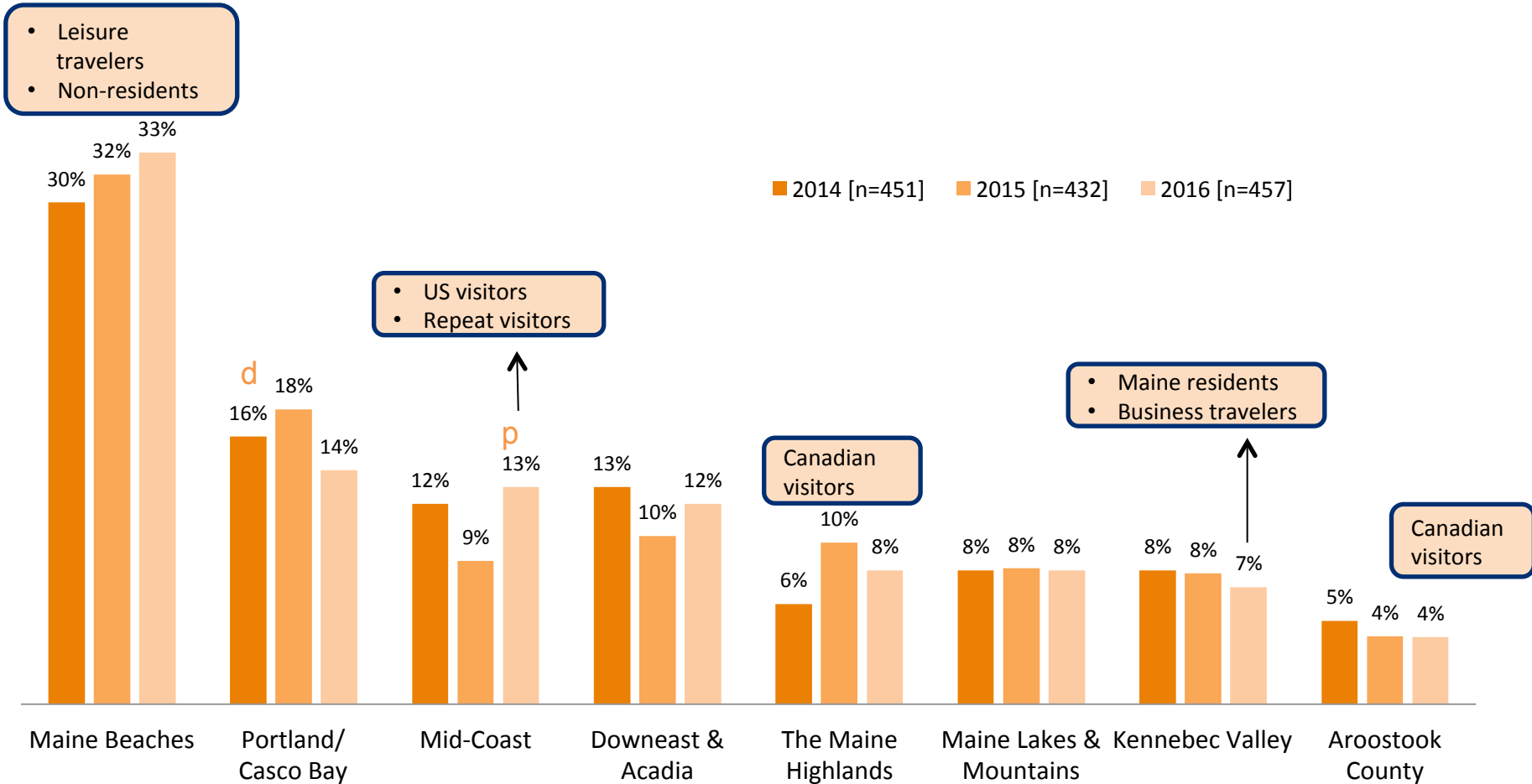


Overnight Q25. What region in Maine was your primary destination?

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

The Maine Beaches region also continues to be the most popular destination for Maine’s winter day visitors.

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



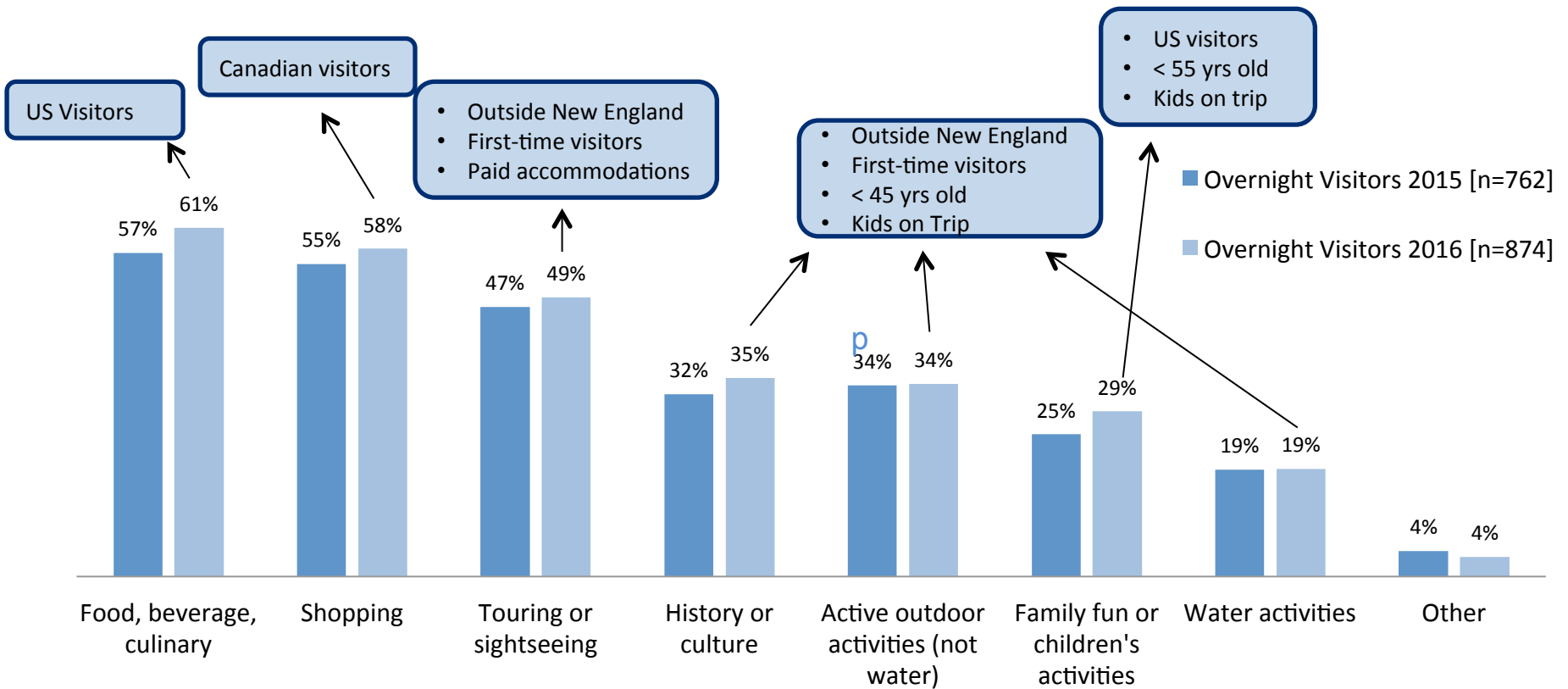
Day Q21. What region in Maine was your primary destination?

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

A majority of winter overnight visitors to Maine are interested in exploring the various *food/beverage/culinary* options available or *shopping*.

- Not surprisingly, differences can be seen across sub-groups of overnight visitors in the types of activities they wanted to pursue while visiting Maine (indicated in blue boxes in the chart below).

Travel Interest Areas of Maine Overnight Winter Visitors

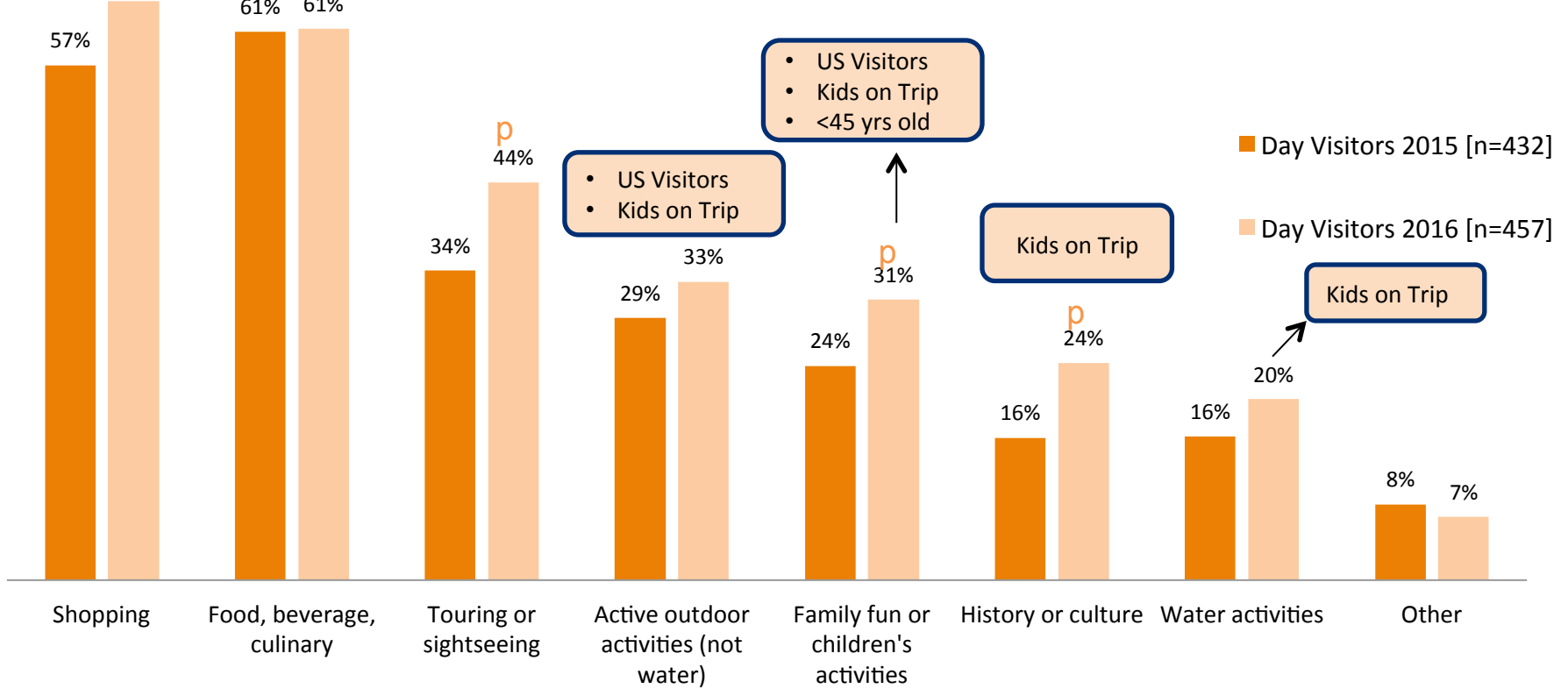


Similarly, day visitors were most interested in *shopping* and *food/beverage/culinary* activities.

- Winter day visitors in 2016 appeared more likely to be interested in *touring or sightseeing*, *family fun/children activities*, and *history/culture* as compared to last winter.

Canadian visitors

Travel Interest Areas of Maine Winter Visitors*

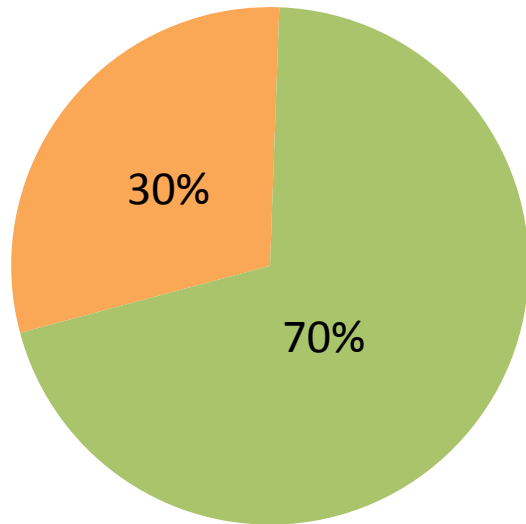


Day Q18: Which of the following interest areas did you want to pursue during this trip to Maine?
pq notes significant difference between 2015 and 2016 at the 95% confidence level

More than two-thirds of overnight winter visitors stayed in paid accommodations, with most lodging at hotels/motels/resorts.

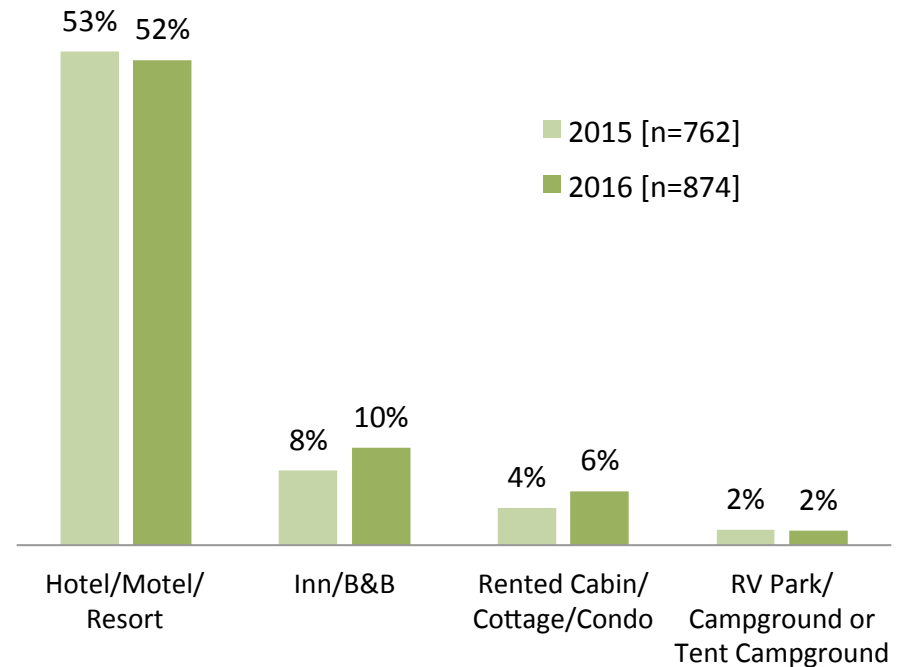
- Maine overnight visitors stay 3 or 4 nights on average. Length of stay is longer among visitors from outside New England (4.1 nights), first-time visitors (4.4 nights), travelers under the age of 45 (3.9 nights) and those traveling with children (3.9 nights).

Type of Accommodation
[n=874]



Unpaid Accommodations Paid Accommodations

Type of Paid Accommodation



Average Length of Stay: 3.4 Nights

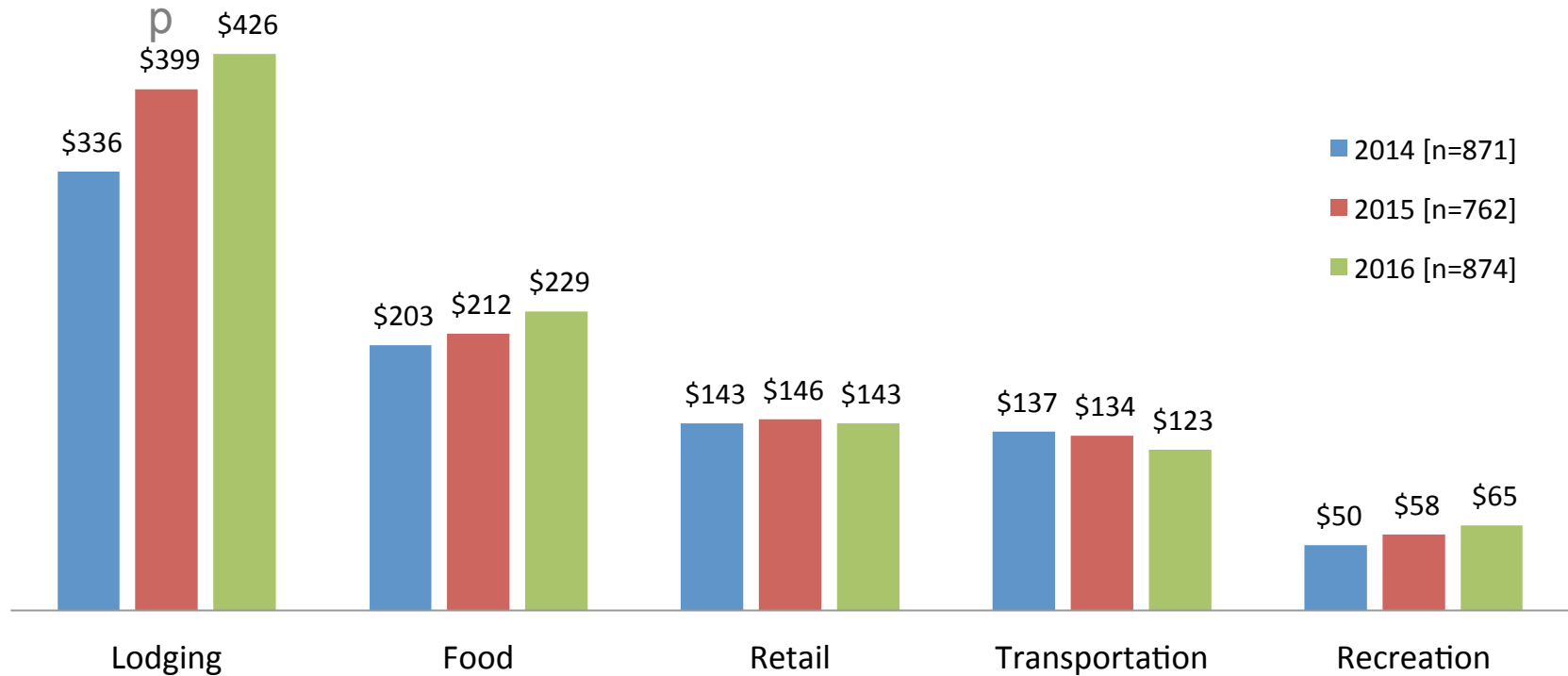
Overnight Q10. On this trip to Maine, how many nights were you away from home?

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

pq notes significant difference between 2015 and 2016 at the 95% confidence level

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

Average Spending per Travel Party – Overnight Visitors*

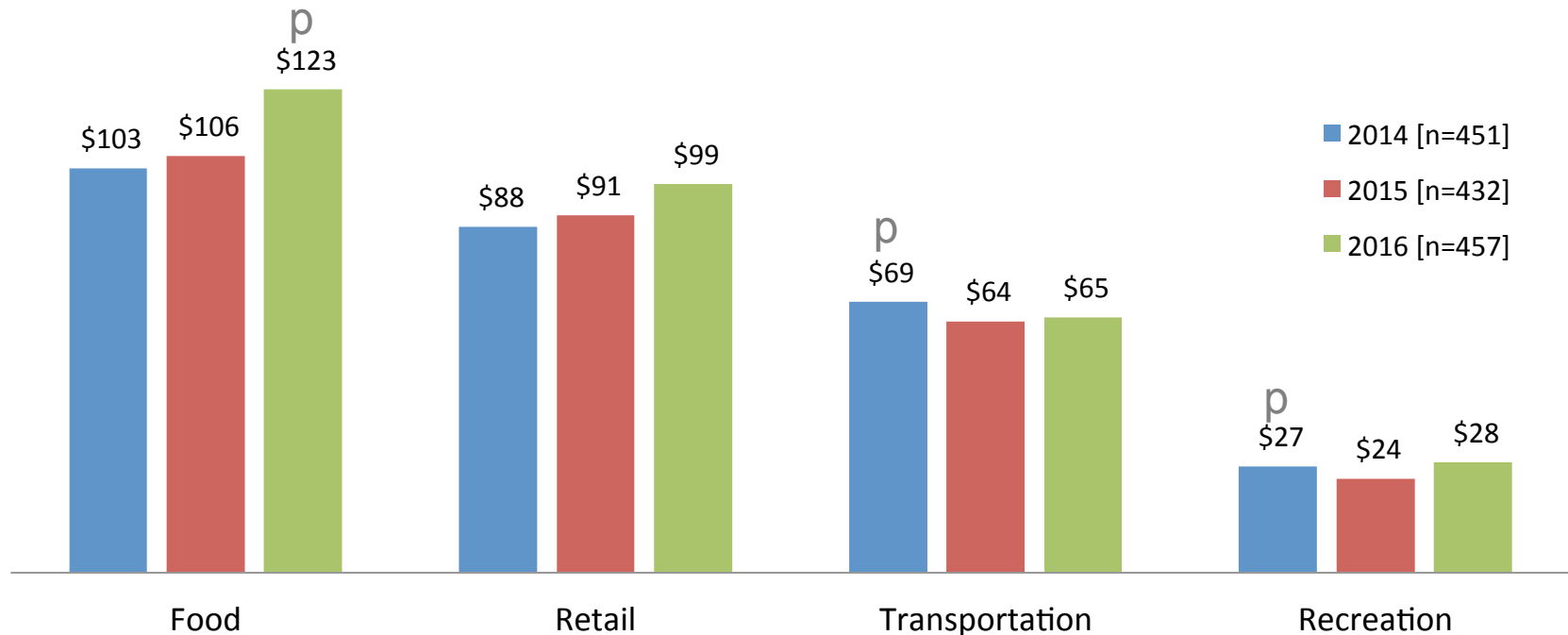


*Reported figures represent the average amount of money spent per travel party, including parties that spent \$0.

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

On average, day visitors spent the most on food during the Winter 2016 season, followed by retail goods.

Average Spending per Travel Party – Day Visitors*



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

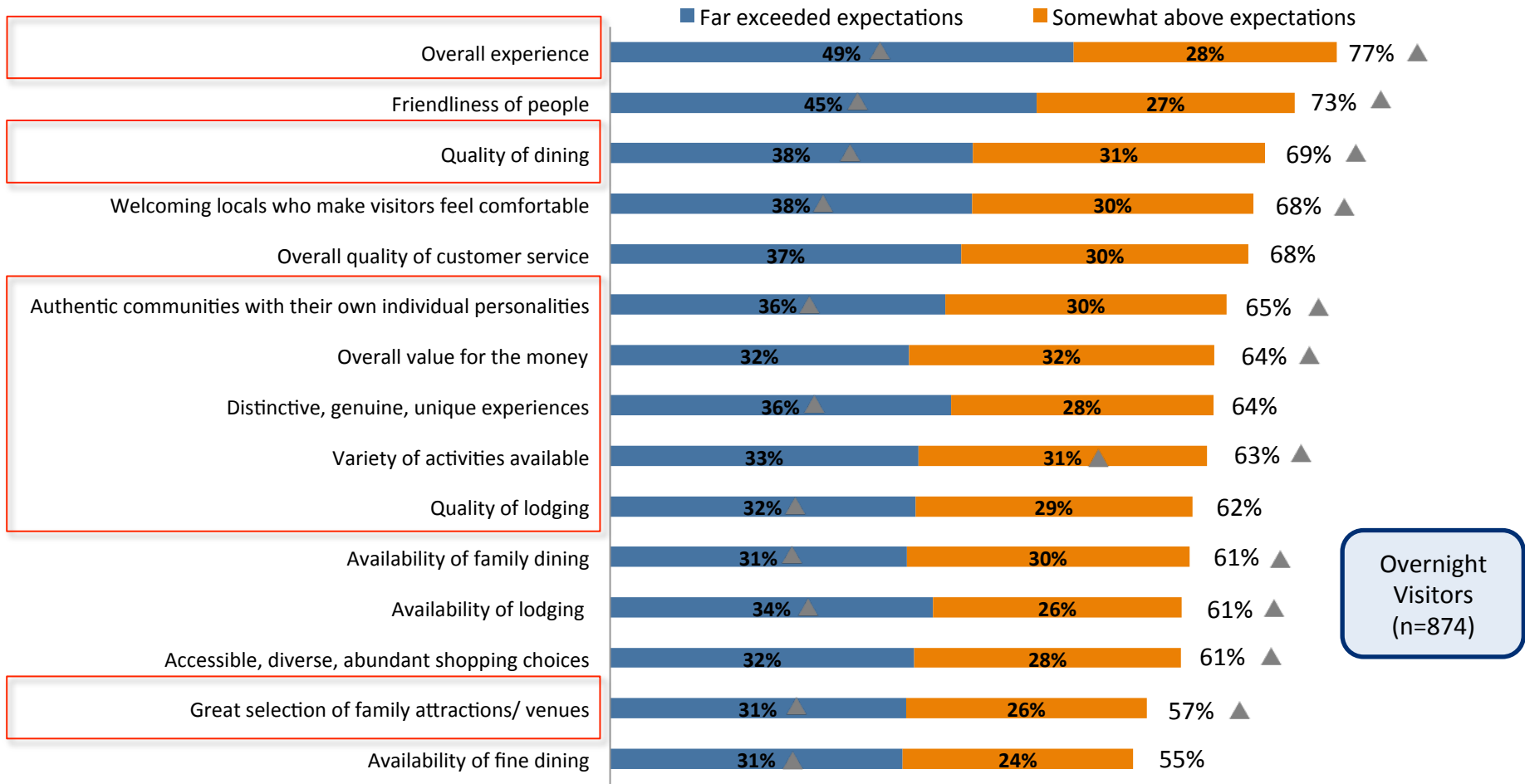
pq notes significant difference from the prior year at the 95% confidence level

Trip Evaluation



Three-fourths of winter overnight visitors report that the *overall experience* and *friendliness of the people* exceeded their expectations while visiting Maine. 2016 Winter Season Topline (Dec 2015 – Apr 2016)

- Visitors from the United States are more likely to indicate that their trip in Maine exceeded their expectations for several items compared to visitors from Canada (indicated with red boxes).



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. pq notes significant difference between 2015 and 2016 at the 95% confidence level

As observed last year, winter visitor satisfaction shows a significant year-over-year increase.

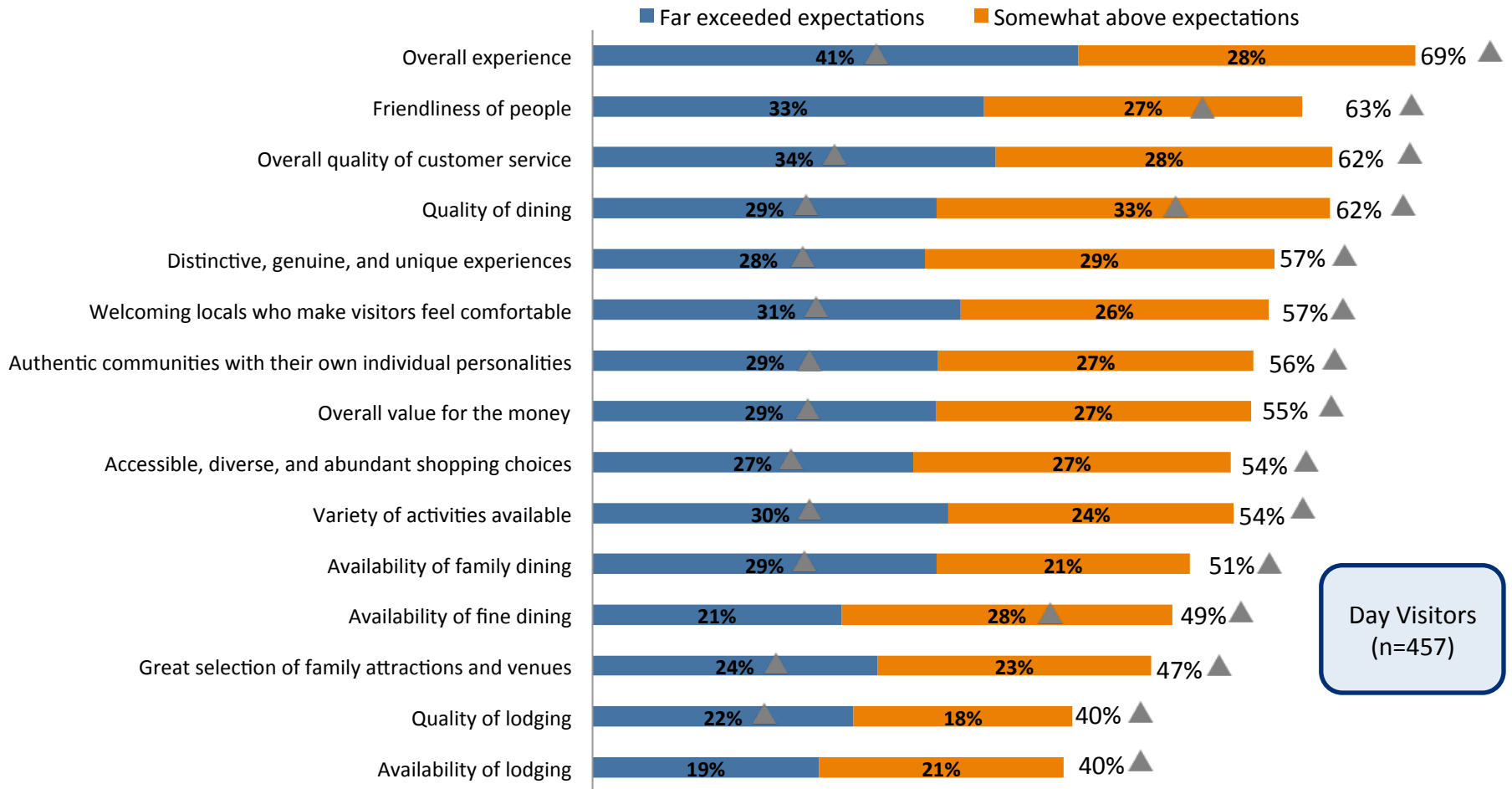
- In all but four categories, a higher proportion of winter overnight visitors this year indicated that Maine had exceeded their expectations compared to the prior year.

	Top 2 Box 2015 (n=762)	Top 2 Box 2016 (n=874)
Overall experience	69% p	77% p
Friendliness of people	67% p	73% p
Overall quality of customer service	63% p	68%
Welcoming locals who make visitors feel comfortable	62%	68% p
Quality of dining	61% p	69% p
Distinctive, genuine, unique experiences	59% p	64%
Overall value for the money	58% p	64% p
Quality of lodging	58% p	62%
Authentic communities with their own individual personalities	57% p	65% p
Variety of activities available	55% p	63% p
Accessible, diverse, abundant shopping choices	54% p	61% p
Availability of lodging	54% p	61% p
Availability of family dining	52% p	61% p
Availability of fine dining	51% p	55%
Great selection of family attractions/ venues	50% p	57% p

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.

pq notes significant difference between 2015 and 2016 at the 95% confidence level

Two-thirds of Maine winter day visitors state their *overall experience exceeded their expectations.*



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.

pq notes significant difference between 2015 and 2016 at the 95% confidence level

Similar to overnight visitors, expectation ratings among day visitors were significantly higher this winter season as compared to last winter.

	Top 2 Box 2015 (n=432)	Top 2 Box 2016 (n=457)
Overall experience	59%	69% ^p
Friendliness of people	49%	63% ^p
Overall quality of customer service	47%	62% ^p
Quality of dining	47%	62% ^p
Distinctive, genuine, and unique experiences	44%	57% ^p
Welcoming locals who make visitors feel comfortable	45%	57% ^p
Authentic communities with their own individual personalities	44%	56% ^p
Overall value for the money	44%	55% ^p
Accessible, diverse, and abundant shopping choices	39%	54% ^p
Variety of activities available	42%	54% ^p
Availability of family dining	40%	51% ^p
Availability of fine dining	36%	49% ^p
Great selection of family attractions and venues	38%	47% ^p
Quality of lodging	30%	40% ^p
Availability of lodging	31%	40% ^p

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.

^{pq} notes significant difference between 2015 and 2016 at the 95% confidence level

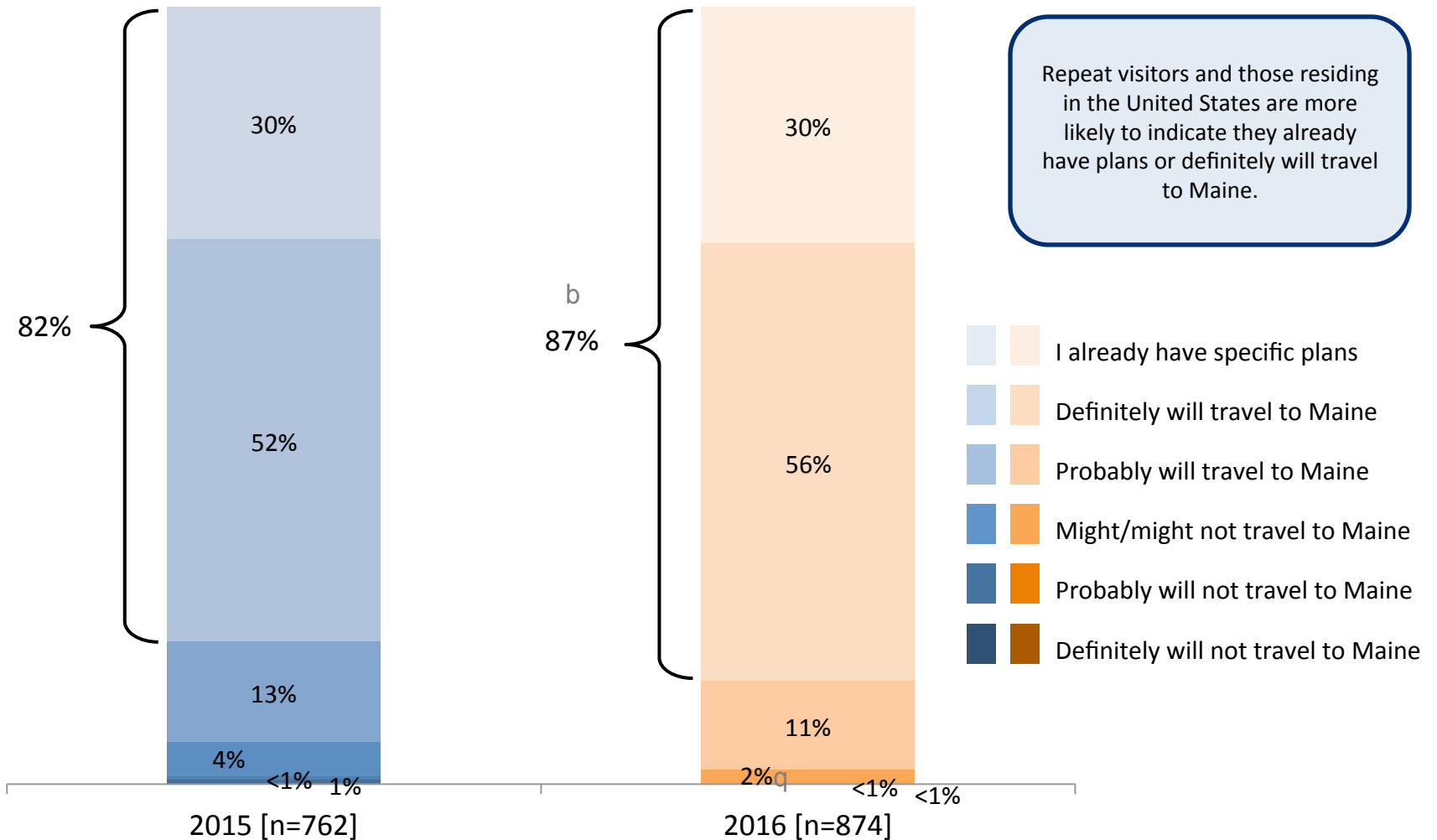
Future Travel



Three in ten winter overnight visitors already have specific plans to visit Maine again – the same proportion as last winter.

Likelihood of Trip to Maine in Next Two Years

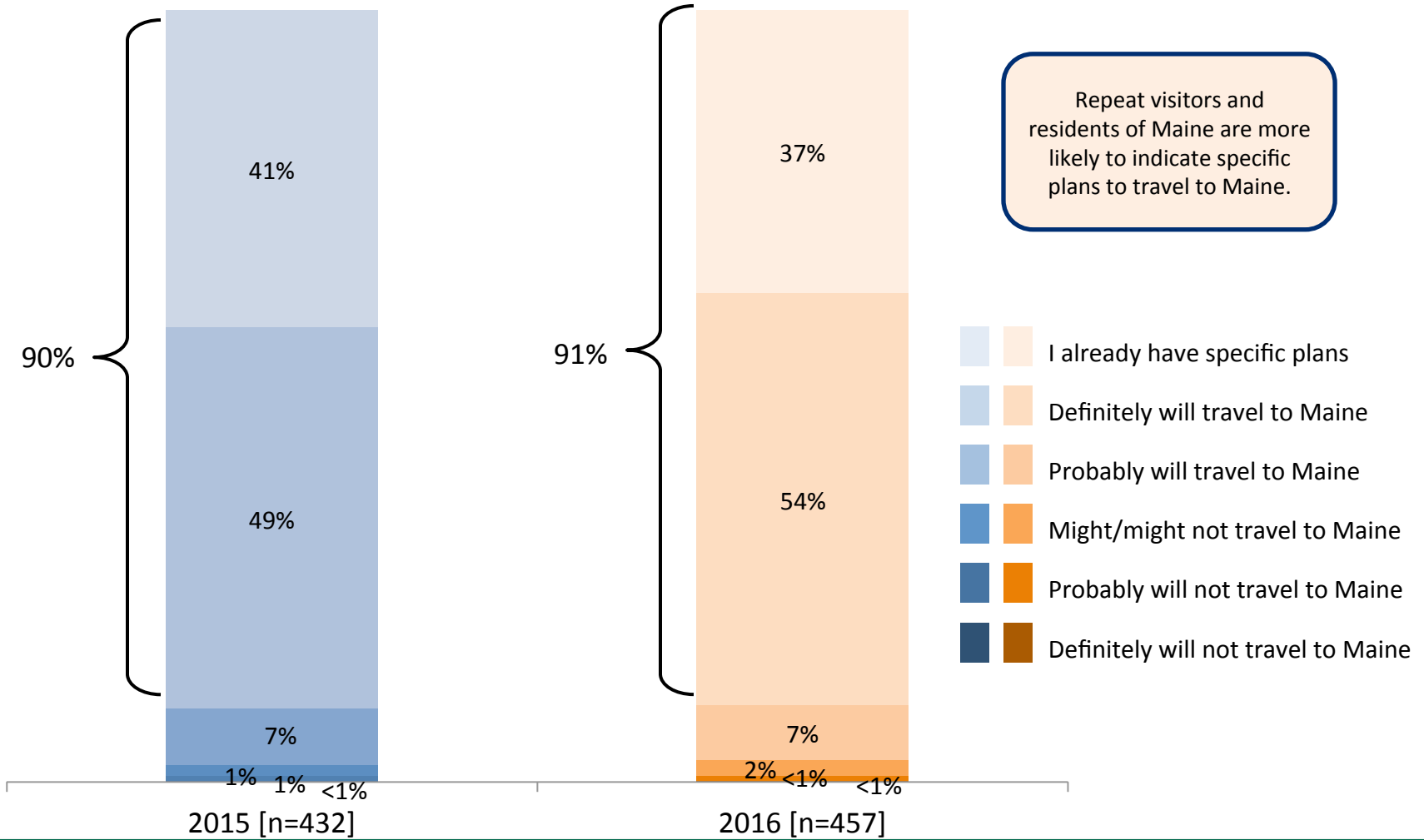
Repeat visitors and those residing in the United States are more likely to indicate they already have plans or definitely will travel to Maine.



An even higher proportion of winter day visitors report they have specific plans to return to Maine in the next two years - the same proportion as last winter.

Likelihood of Trip to Maine in Next Two Years

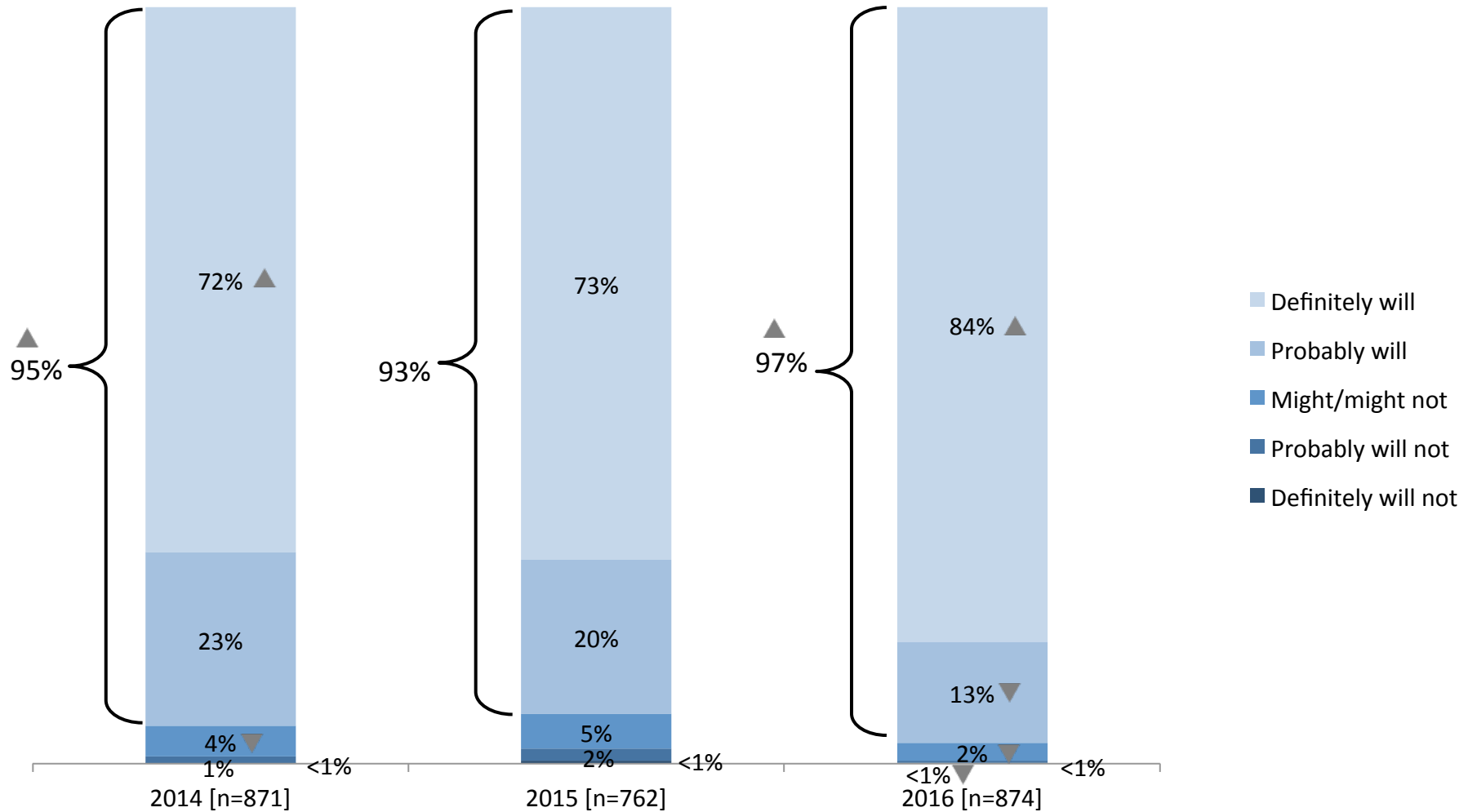
Repeat visitors and residents of Maine are more likely to indicate specific plans to travel to Maine.



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

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

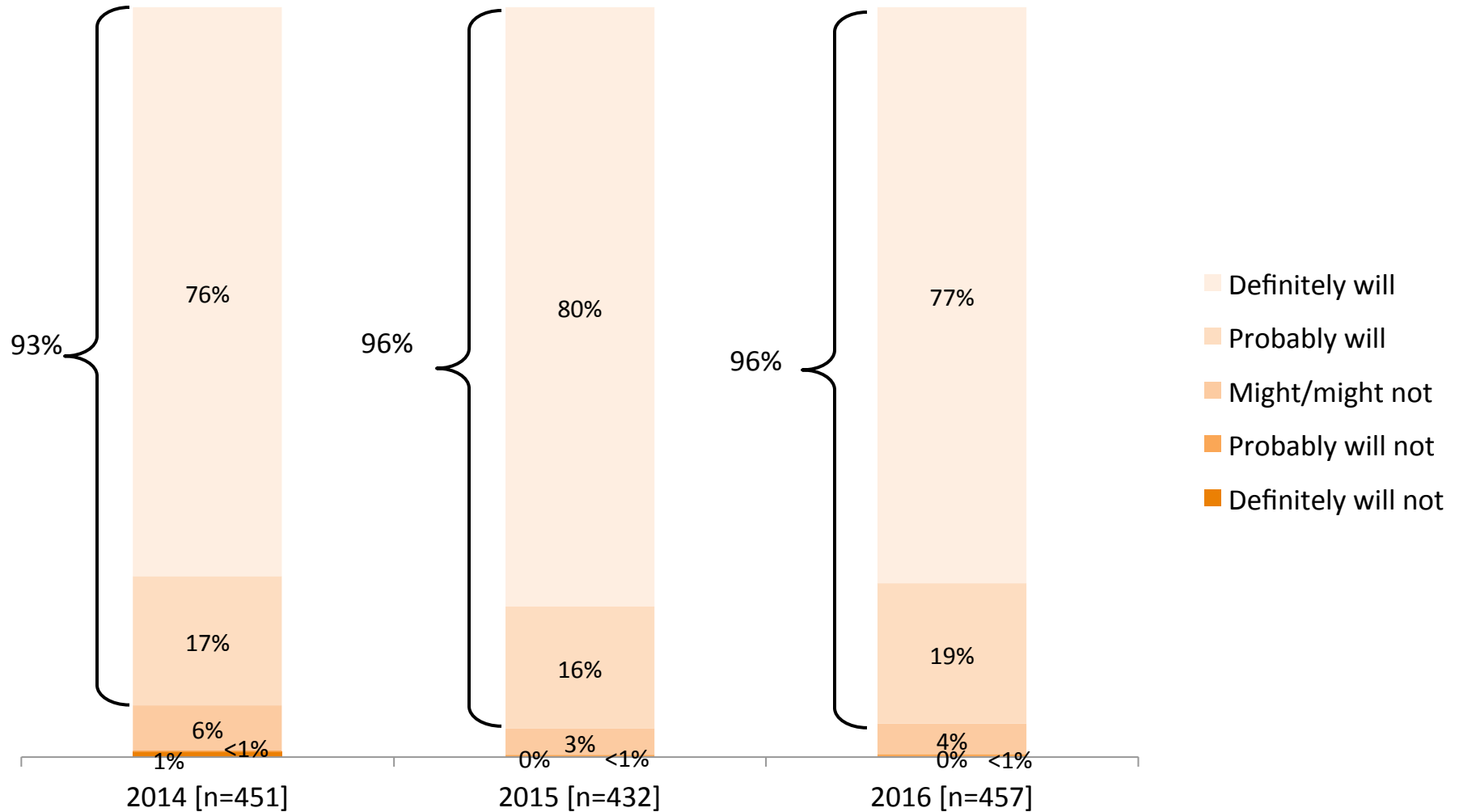
An increase from the prior winter season, almost all overnight visitors indicate they will recommend Maine as a vacation destination.



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

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

Day visitors also continue to be excited about their Maine vacation, with 96% stating they are likely to recommend Maine as a vacation destination.





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