



Maine Office of Tourism Visitor Tracking Research Summer 2017 Seasonal Topline



Prepared by



October 2017

Research Objectives and Methodology

Research 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 to/in Maine greater than 50 miles from home in the last four weeks
- Surveyed monthly

Methodology

- This report outlines results from the Summer 2017 travel season, describing travel that occurred between May and August 2017.
- Summer data collection occurred monthly between June 1st and September 18th, 2017. The number of completed surveys collected for each research component are as follows:

Research Component	Completed Summer Season Surveys
Overnight Visitor Survey	1,314
Day Visitor Survey	808
National Omnibus Survey	12,150

- *Statistical significance between subgroups was calculated at the 95% confidence level and is noted throughout by a/b/c/etc. or ▲▼.*

Executive Summary

2017 Summer Visitation Estimates

26.2 million visitors
came to Maine during
the summer of 2017

10.4 million stayed
overnight

15.8 million visited for
the day

2017 Summer Visitor Profile

Average Age

Overnight Visitor – 40 yrs

Day Visitor – 44 yrs

First-Time Visit

19% of overnight visitors

8% of day visitors

Overnight Visitor Origin

62% New England

29% Mid-Atlantic

9% Canada

Day Visitor Origin

90% U.S. (primarily MA & ME)

10% Canada

2017 Summer Trip Profile

Top Visitor Interest Areas

Food/Beverage/Culinary

Shopping

Touring/Sightseeing

Top Regional Destinations

Maine Beaches Region

Downeast & Acadia

Paid Accommodations

63% of overnight visitors stayed
in paid accommodations

Average Length of Stay

3.5 nights

2017 Summer Visitor Satisfaction

Aspects of Trip Most Likely to Exceed Visitor Expectations

Overall experience
Friendliness of the people
Overall quality of customer service
Distinctive, genuine, unique experiences

Intend to Visit in Next Two Years

76% of overnight visitors
89% of day visitors

Intend to Recommend Maine

93% 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.

2017 Summer Visitor Segments

Overnight Visitors

34% Genuine Originals
31% Balanced Achievers
10% Social Sophisticates

Day Visitors

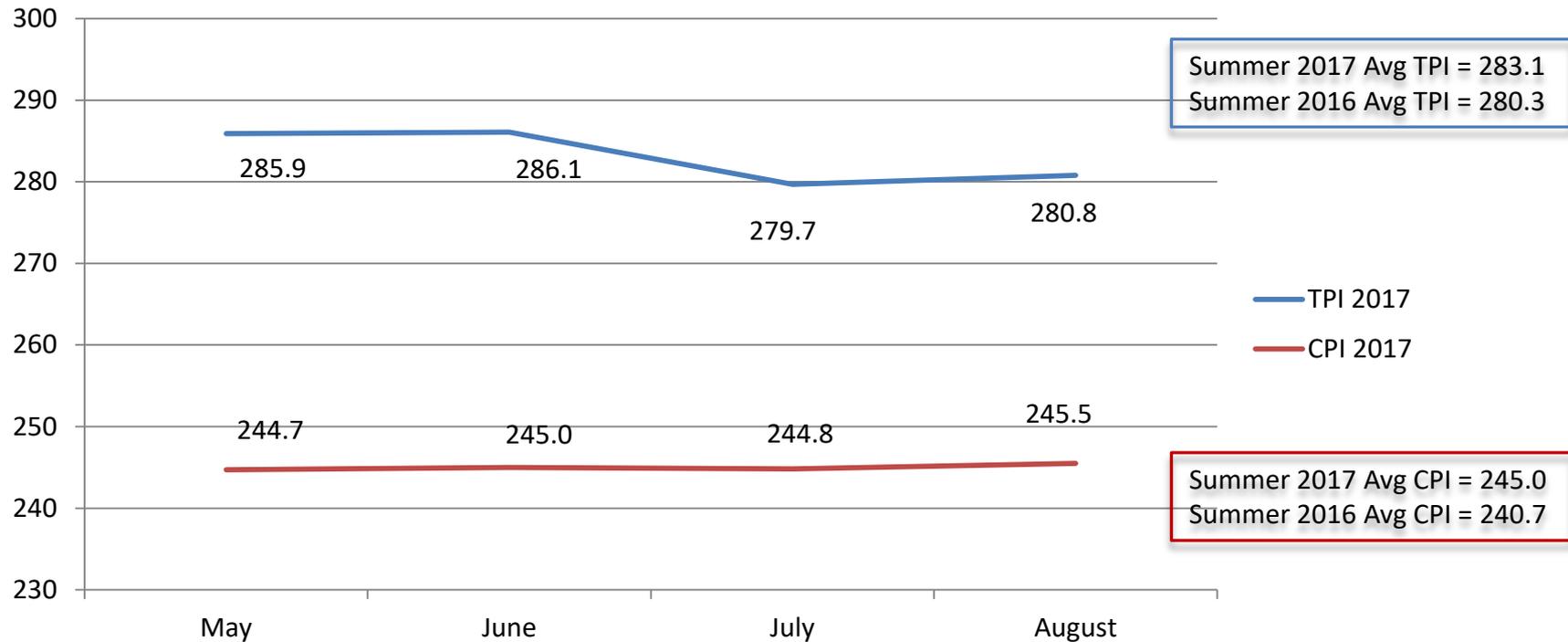
30% Genuine Originals
28% Balanced Achievers
7% Social Sophisticates

2017 Summer Season Travel Context

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

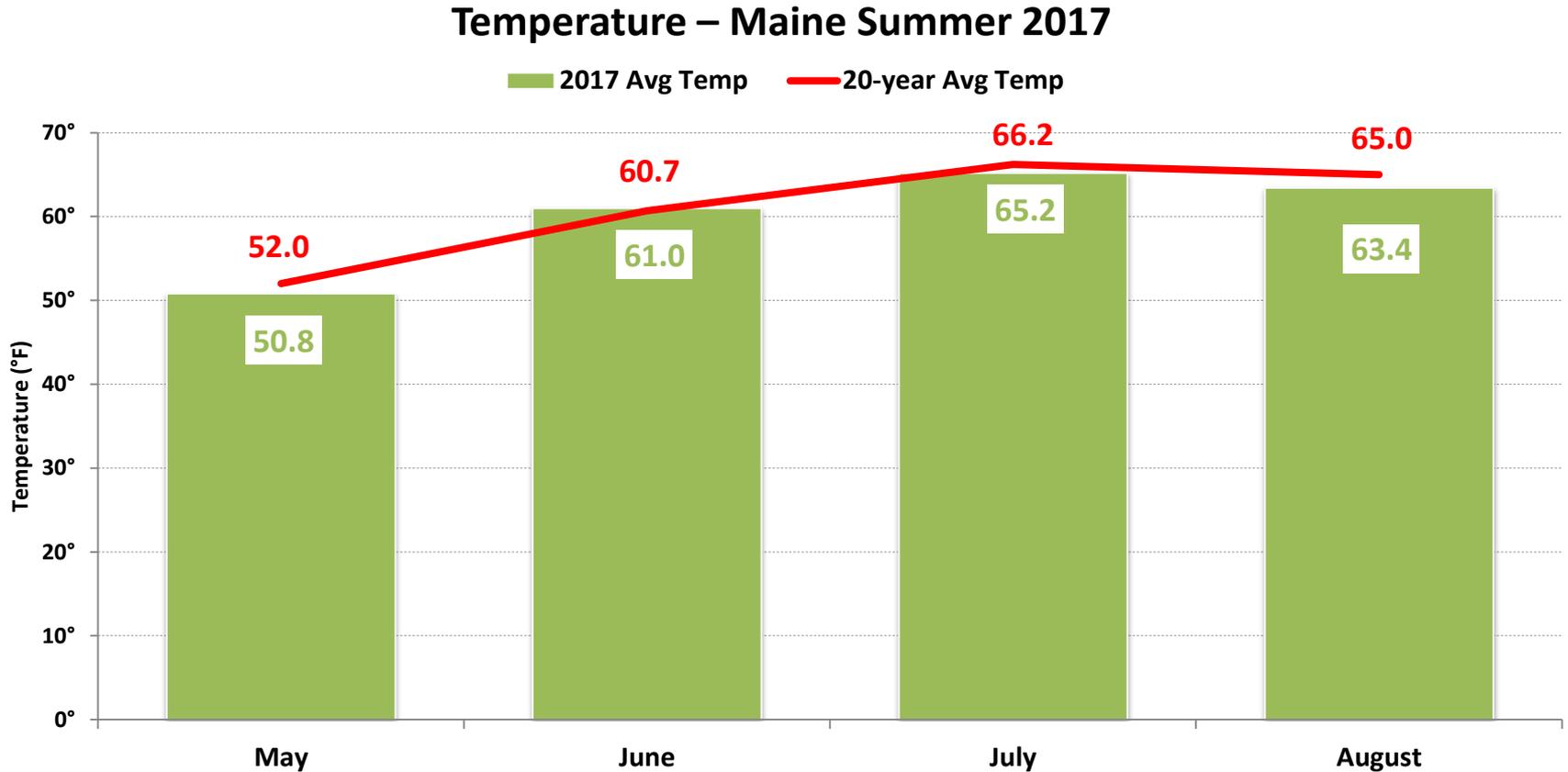
- Both the Travel Price Index and the Consumer Price Index showed year-over-year increases this summer, suggesting a higher cost of goods overall, as well as a higher cost to travel.

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.

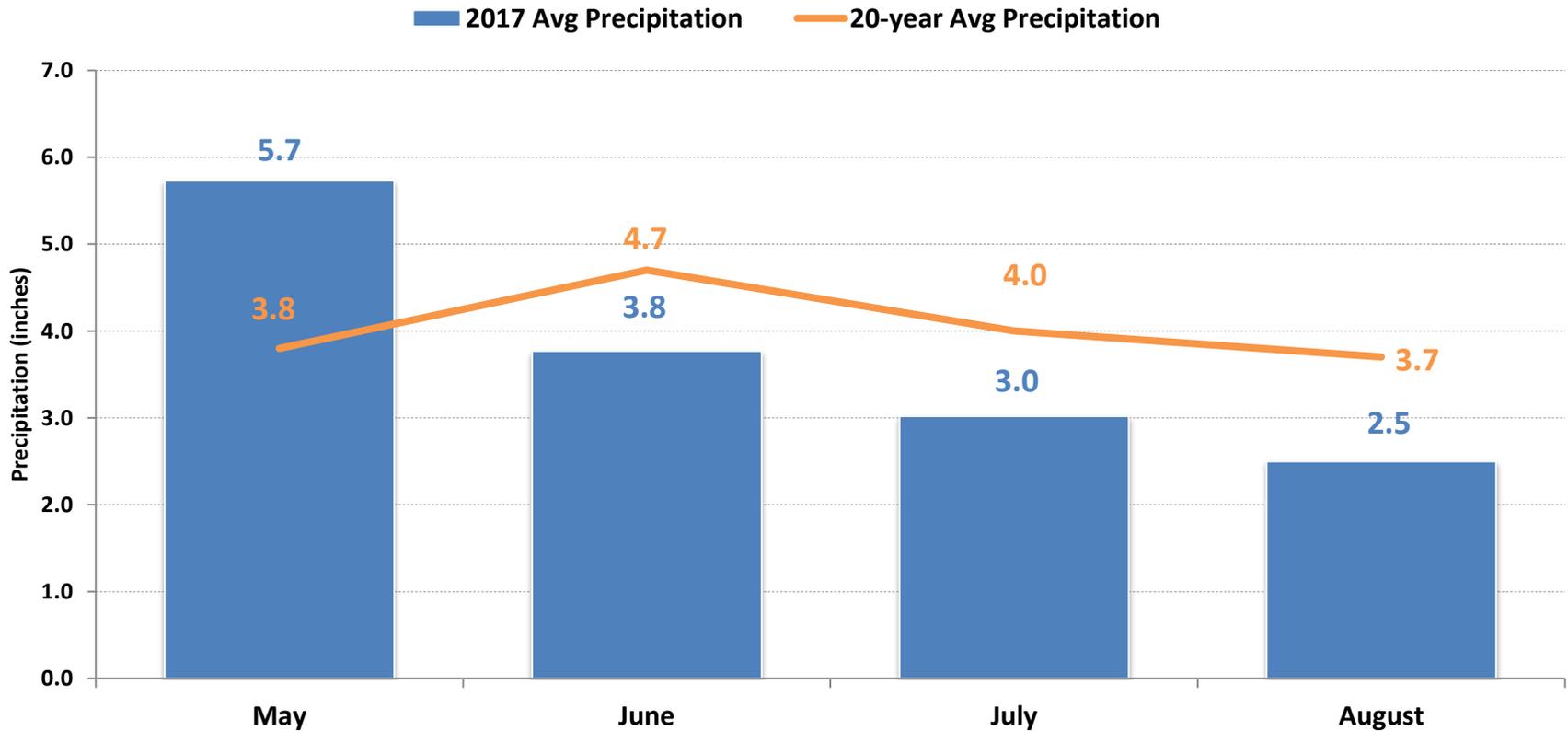
Temperatures in Maine during the Summer 2017 season were comparable to the 20-year average for the State.



Data source: NOAA.gov

Precipitation during May 2017 exceeded the 20-year average for the State, while the remaining summer months had below average precipitation.

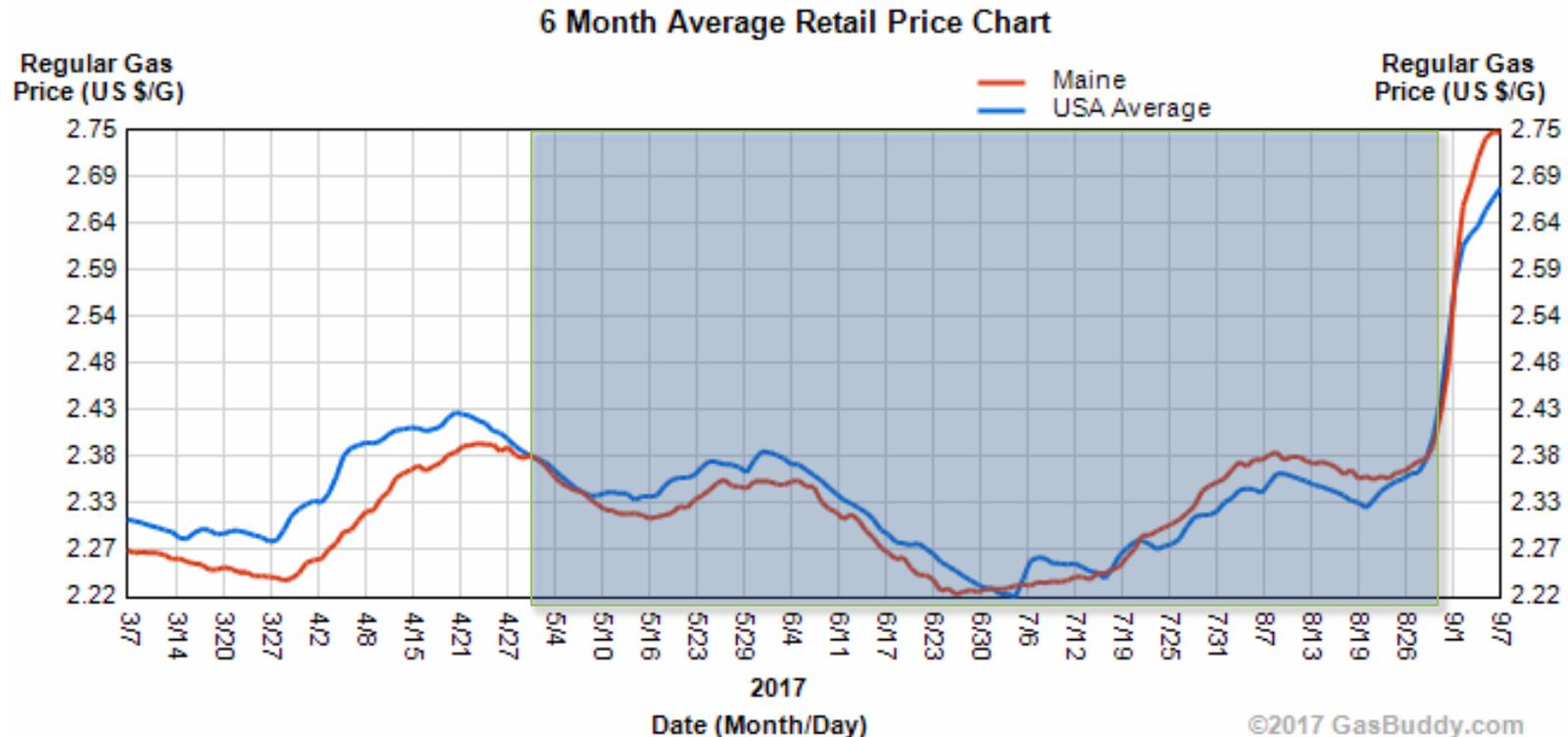
Precipitation – Maine Summer 2017



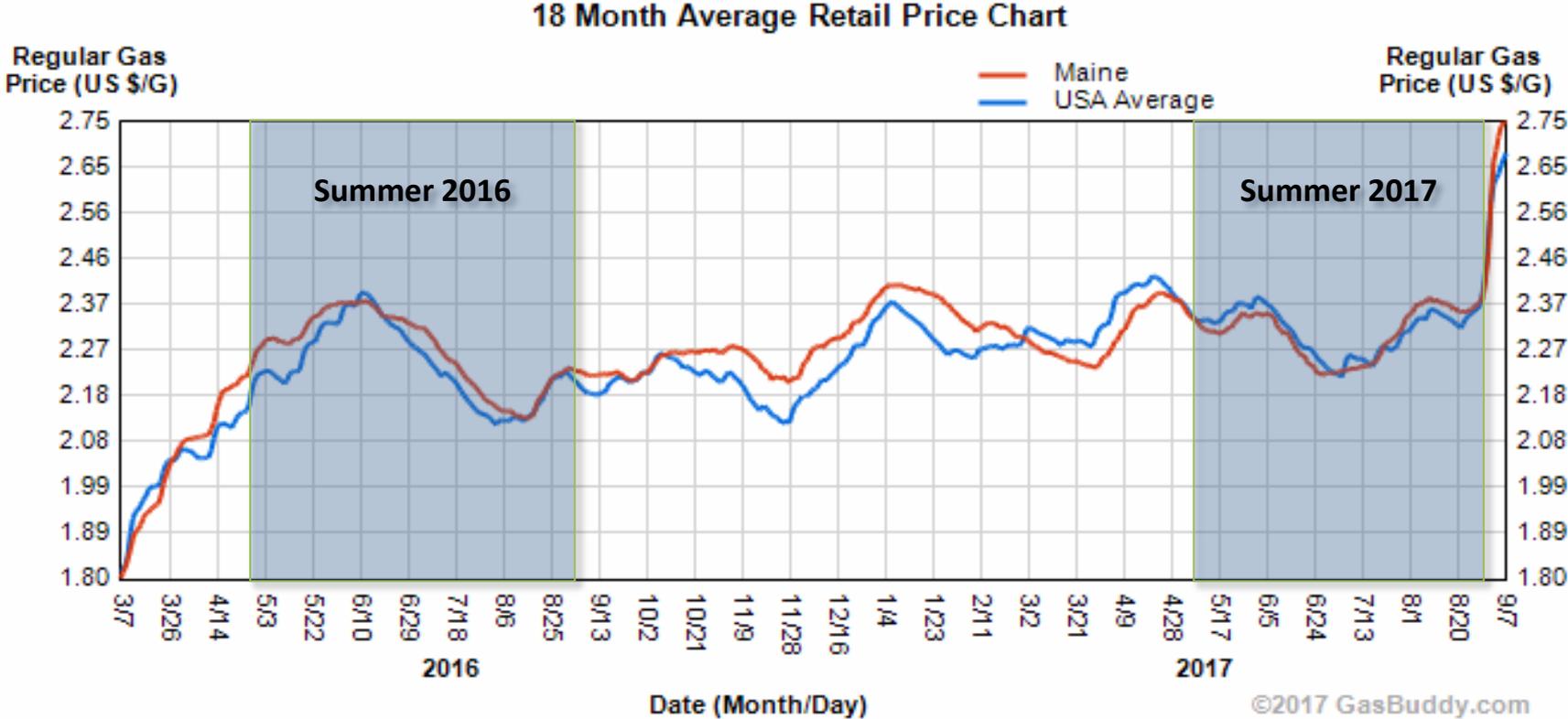
Data source: NOAA.gov

Maine gas prices were below U.S. prices during most of the summer season, rising above the national average in late summer.

- Gas prices hit their lowest level in late June and began climbing again through August with a sharp increase during the Labor Day weekend.

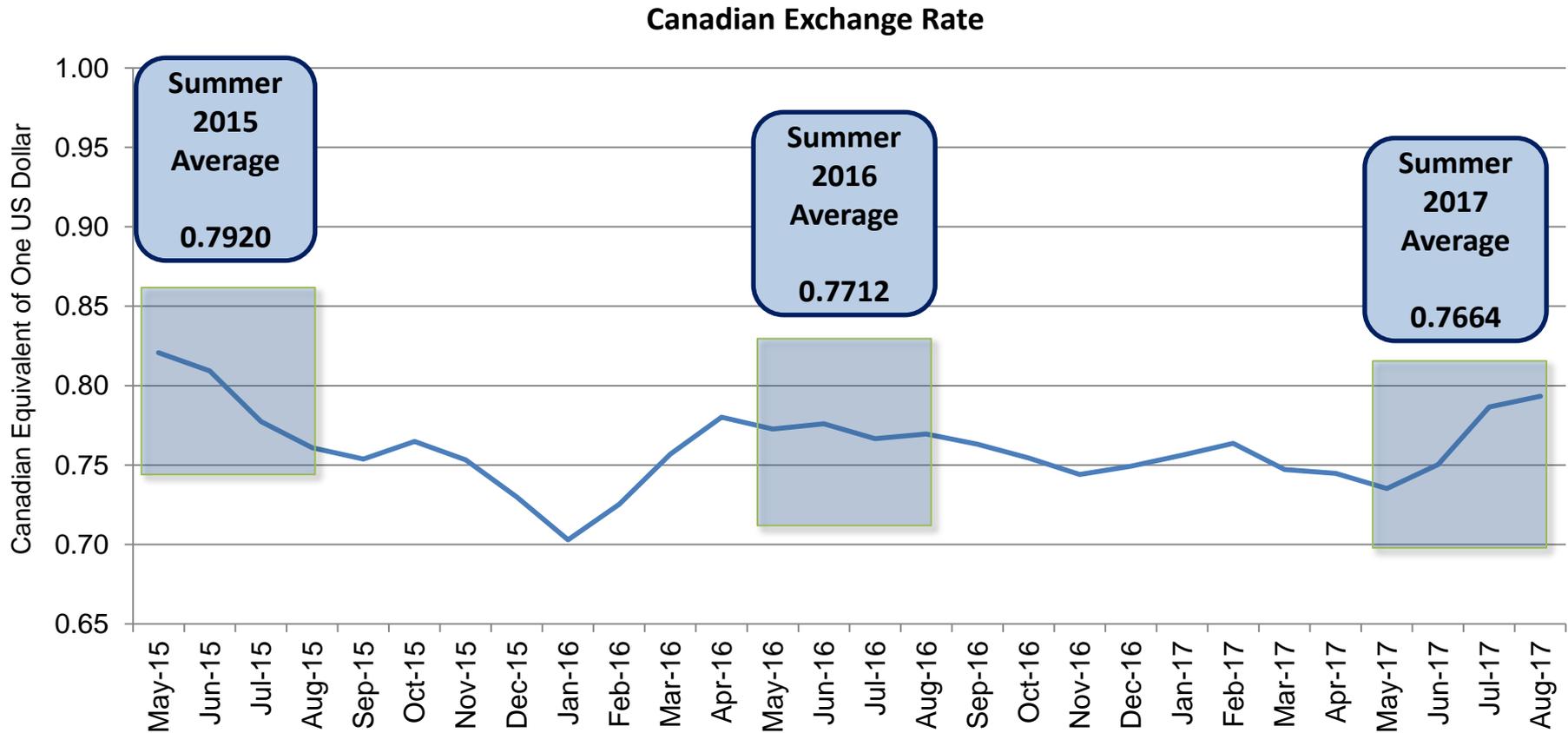


Summer season gas prices nationwide and in Maine were relatively equal to last summer.



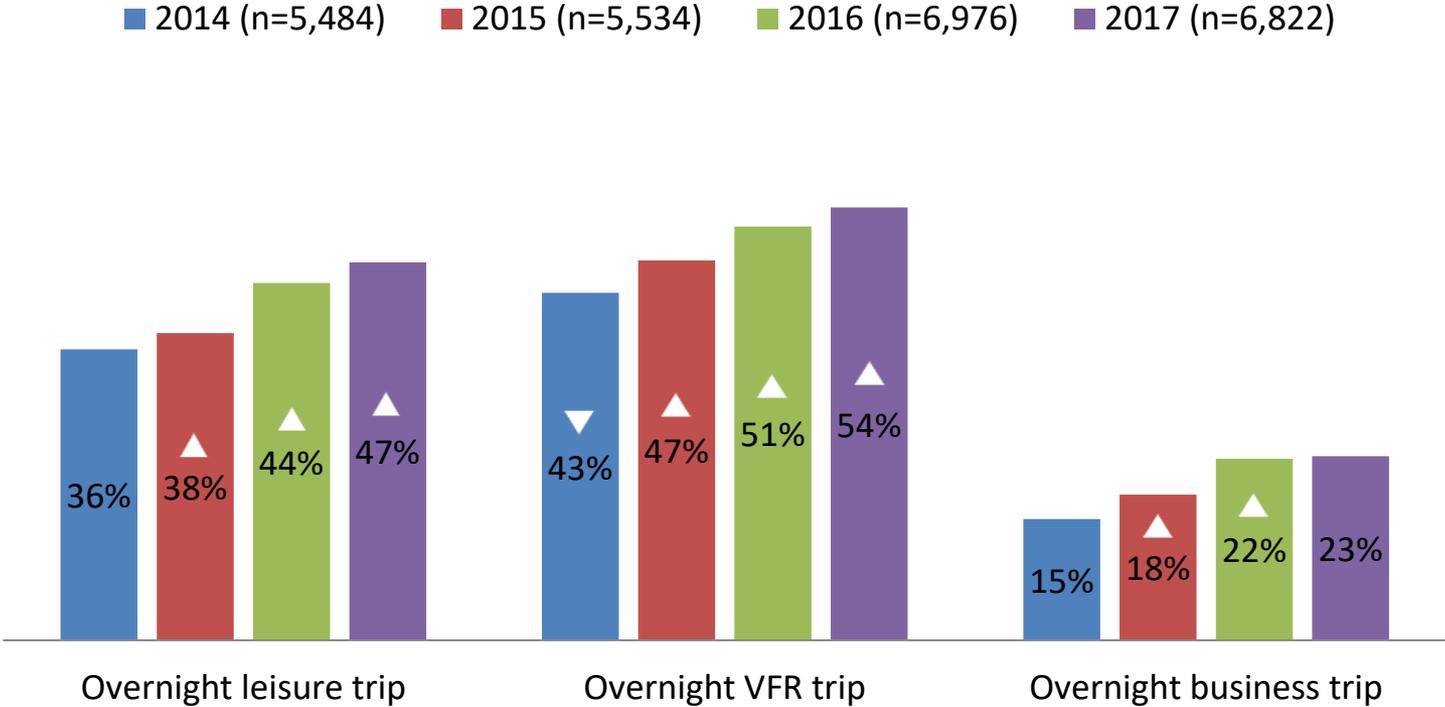
Though the Canadian exchange rate began to rise during the end of the 2017 summer season, the average rate for the summer season overall remained a bit lower than the 2016 summer season.

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



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

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

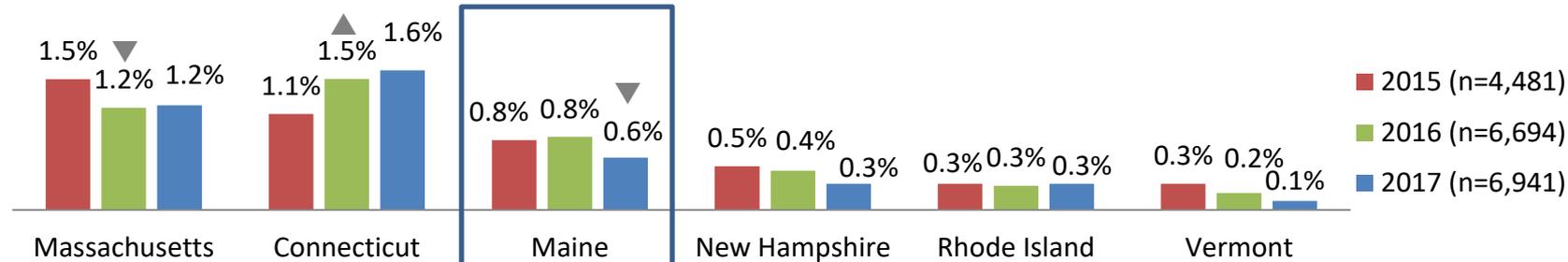


Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

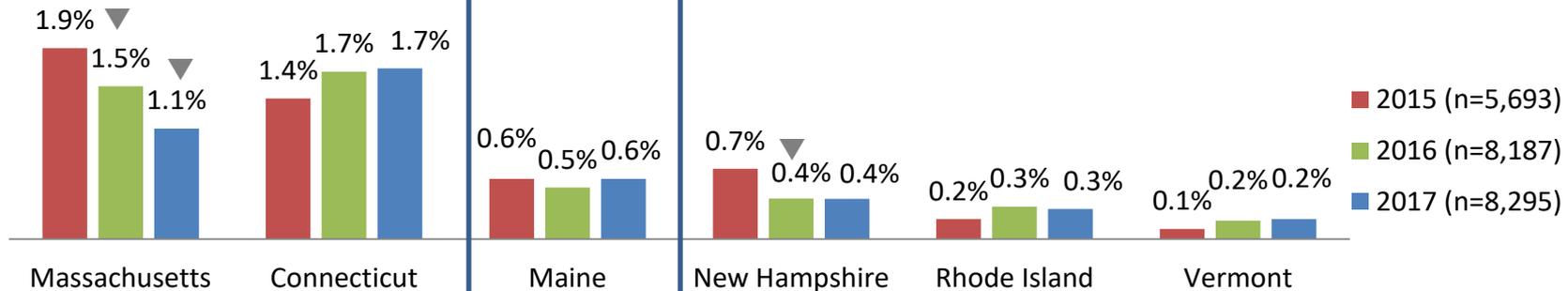
▲ ▼ notes significant difference from the prior year at the 95% confidence level

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

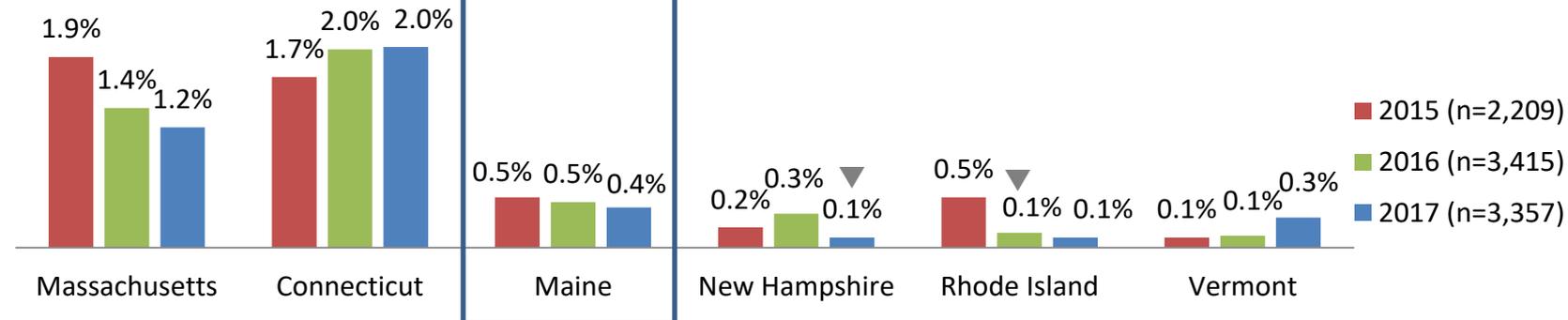
Overnight Leisure Trips



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.

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

2017 Summer Season Highlights

Estimated summer visitation to Maine increased 4.5% from 2016 to 2017, with overnight visitation showing growth of more than 8%.

Visitation Estimates*

	Summer 2016	Summer 2017	% Chg
Total Estimated Visitation	25,067,053	26,187,928	+ 4.5%
<i>Overnight Visitors</i>	<i>9,598,991</i>	<i>10,403,013</i>	<i>+ 8.4%</i>
<i>Day Visitors</i>	<i>15,468,062</i>	<i>15,784,915</i>	<i>+ 2.0%</i>

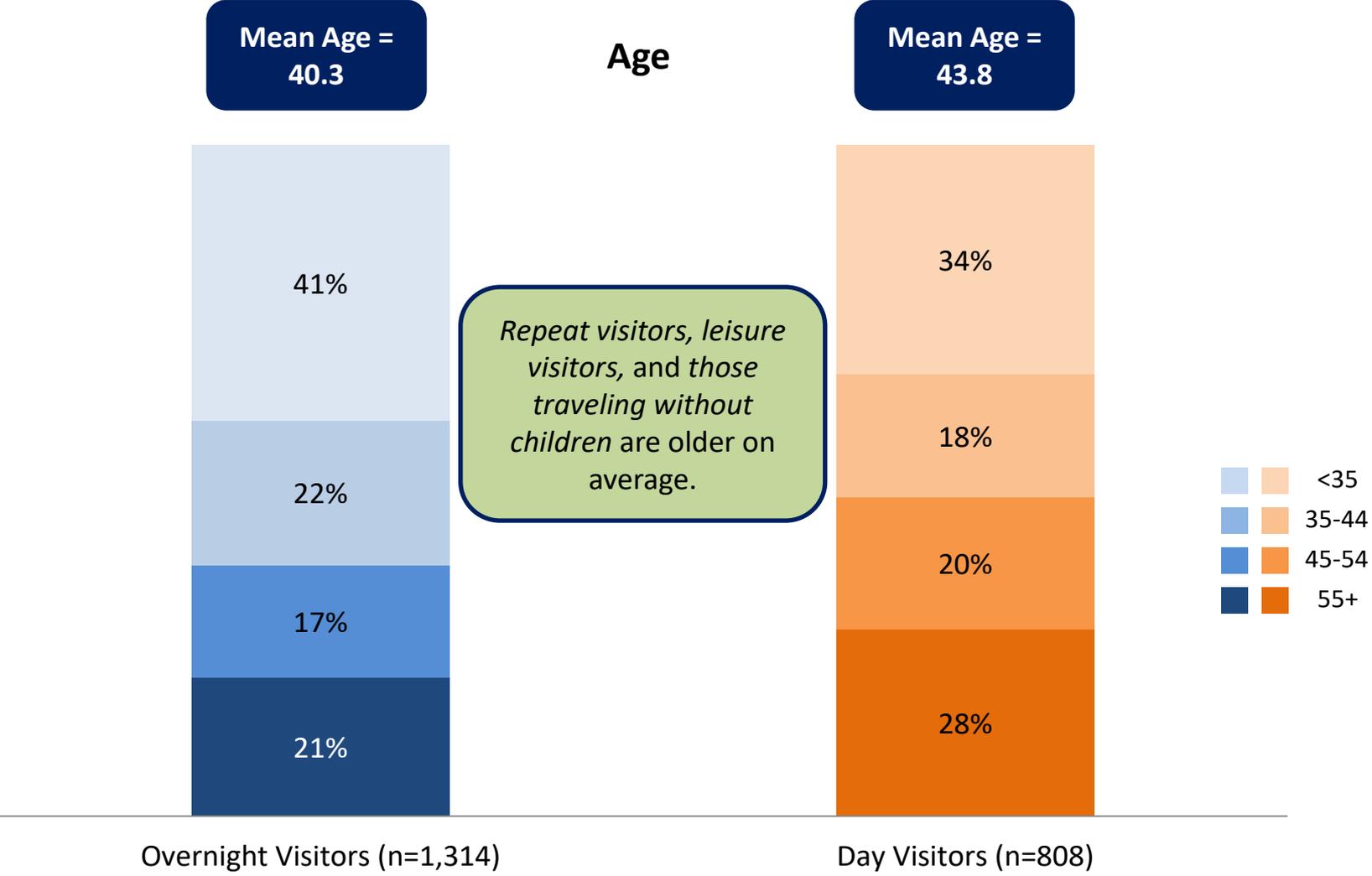
*For the purposes of visitation estimates, only visitors on tourism related trips are included.

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.

Note: Visitation estimates provided here are preliminary and reflect visitation from May through August 2017. Adjustments will be made to these estimates at the end of the year for the Annual Report, to account for seasonal fluctuations.

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

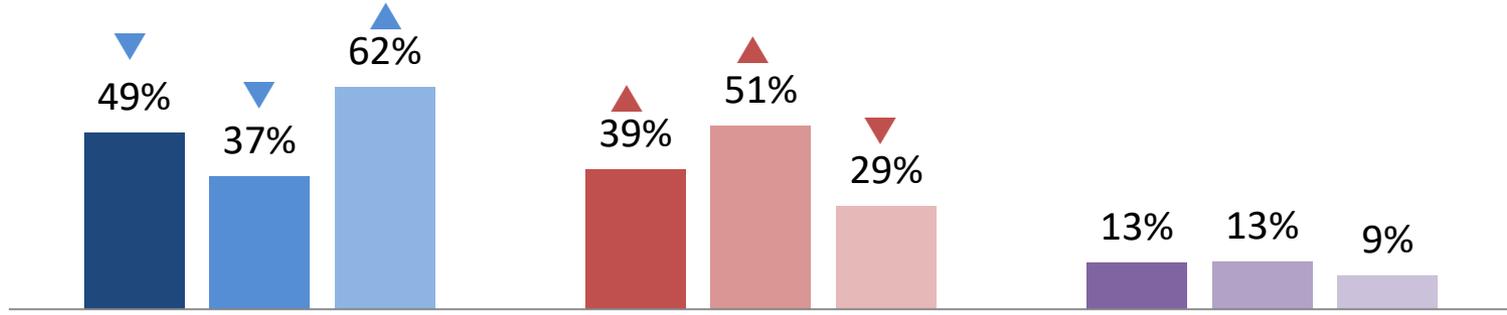


Summer 2017 showed a shift in the relative proportion of visitors from New England and the Mid-Atlantic, but no change in the proportion of visitors from Canada.

The shift in the proportions of domestic visitors by region of origin is a reversal of the trend seen between the 2015 & 2016 summer seasons, but similar to the shift seen during the most recent winter season.

■ 2015 (n=1,281)
■ 2016 (n=1,323)
■ 2017 (n=1,314)

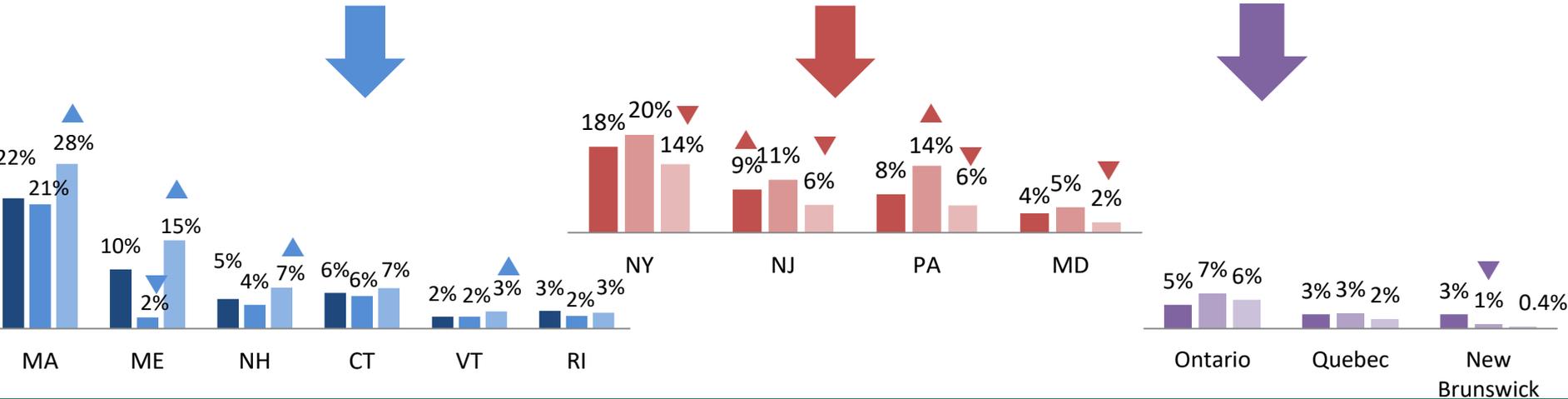
Visitor Origin of Maine Overnight Visitors



U.S. - New England

U.S. - Mid-Atlantic

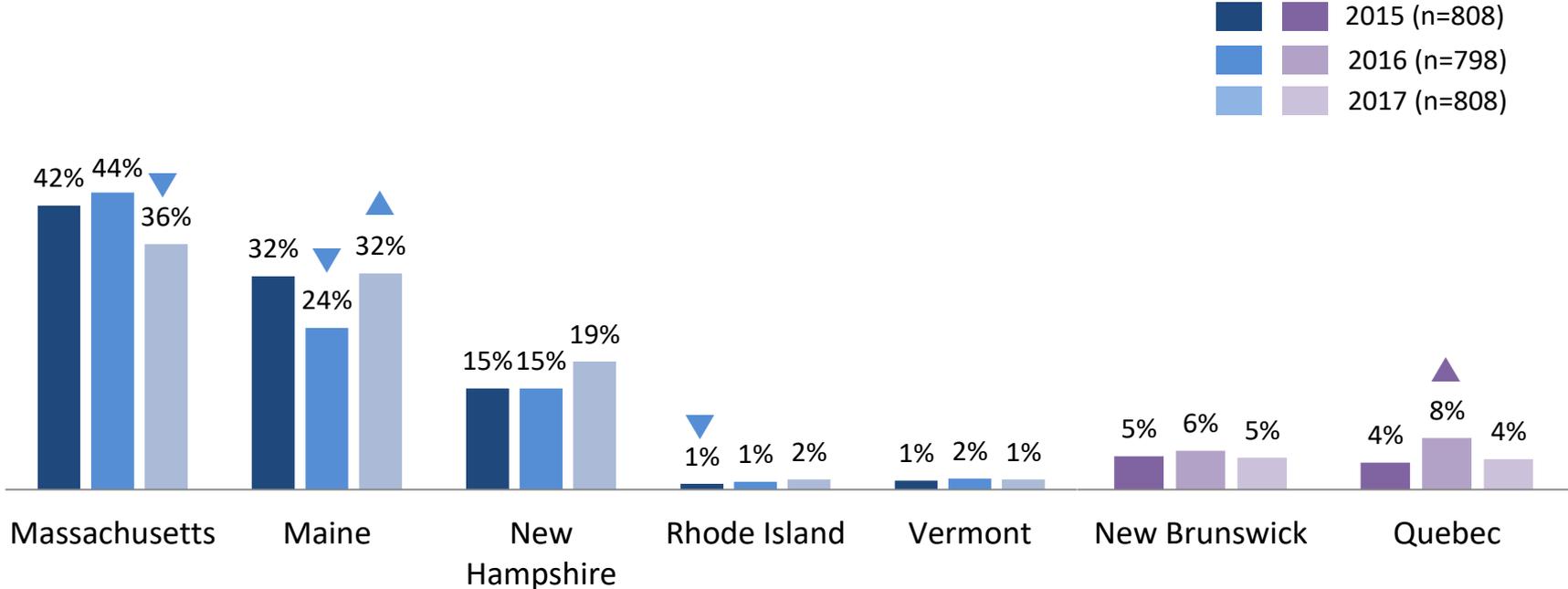
Canada



Massachusetts and Maine continue to provide the greatest proportions of summer day visitors to Maine.

- In-state day visitation experienced an increase this year, returning to the levels seen in prior years.

Visitor Origin of Maine Day Visitors



2017 showed a year-over-year decrease in the proportion of overnight first-time visitors, returning to the proportion seen in 2015.

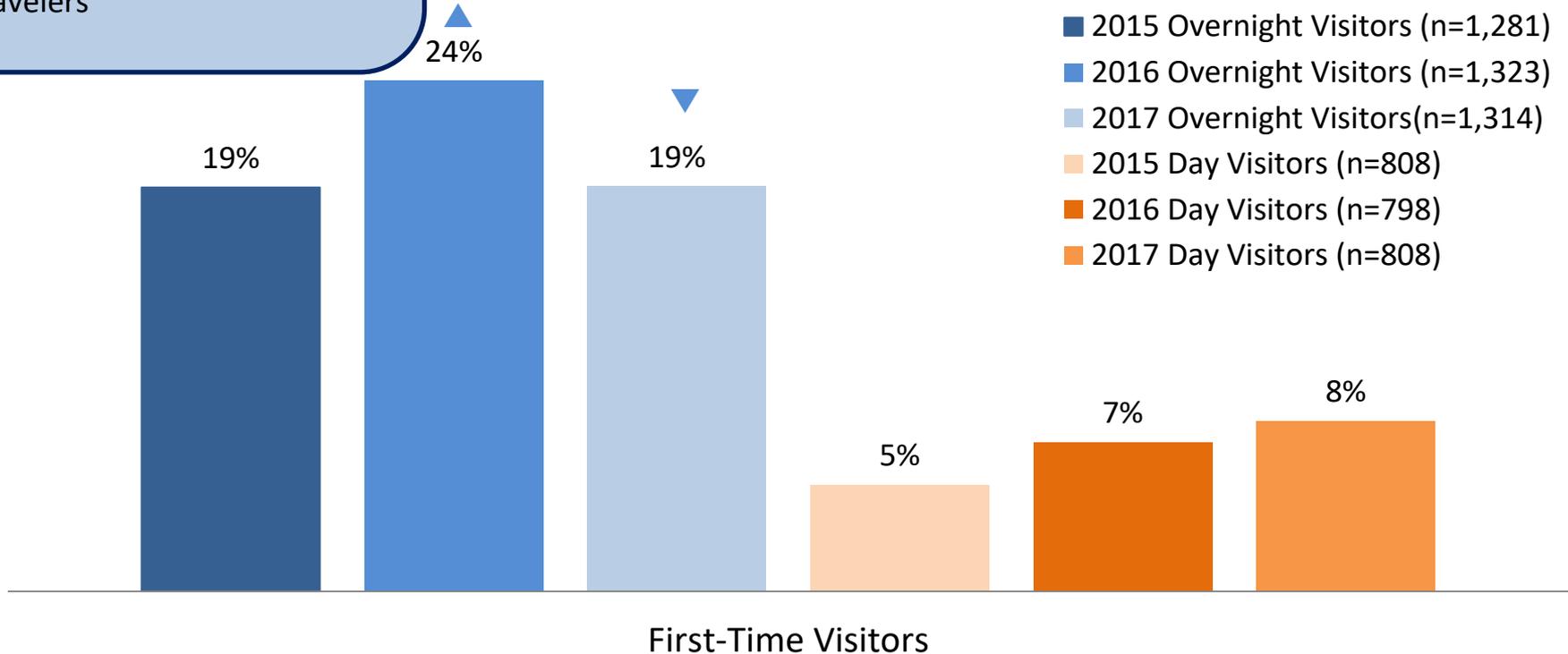
First-Time Overnight Visitors (Compared to Repeat Visitors):

- More likely to be *Canadian*
- *Younger (less than 35 yrs old)*
- More likely to be categorized as *Balanced Achievers*
- More likely to be *business travelers*

First-Time Visitation

First-Time Day Visitors (Compared to Repeat Visitors):

- More likely to be *Canadian*
- More likely to be categorized as *Balanced Achievers*

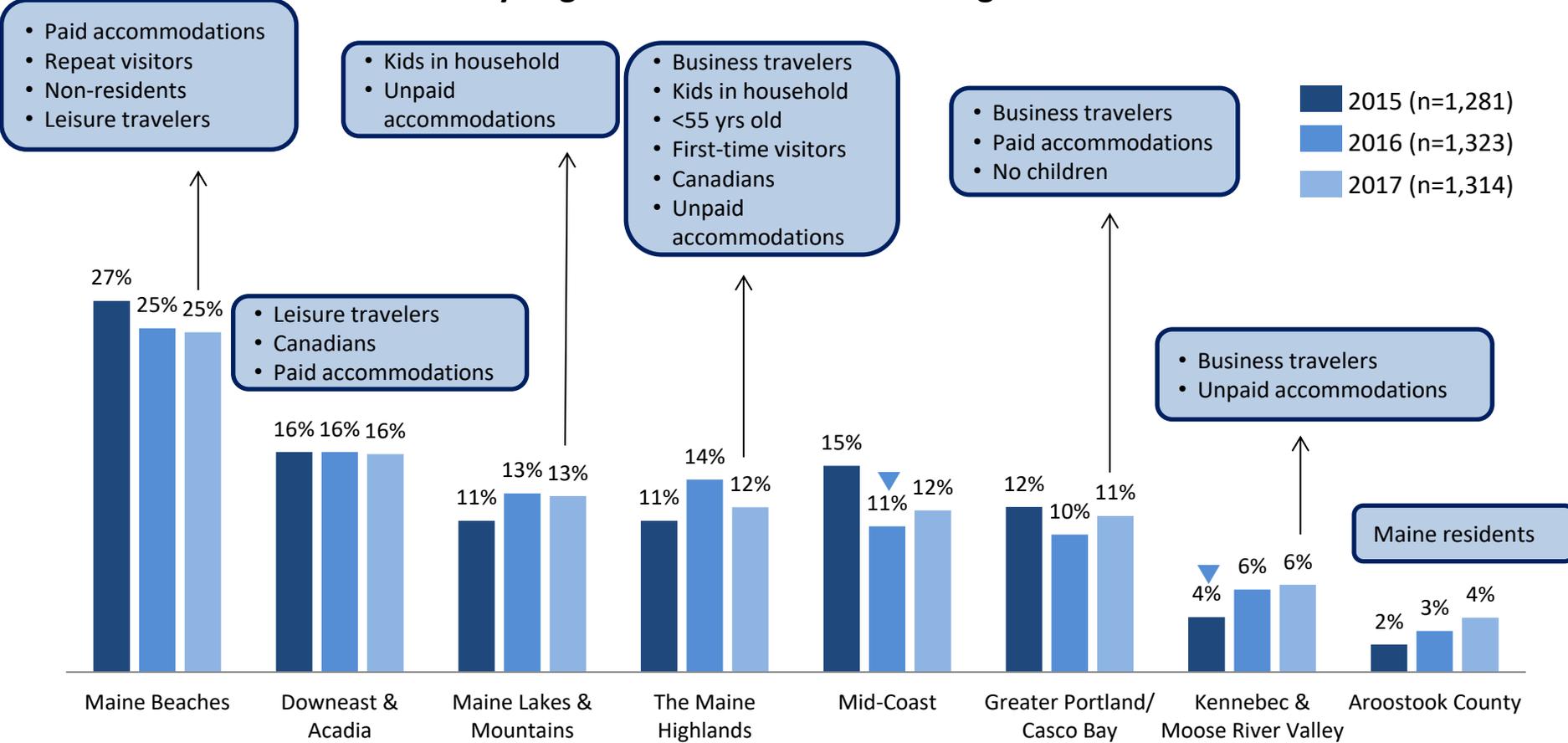


- 2015 Overnight Visitors (n=1,281)
- 2016 Overnight Visitors (n=1,323)
- 2017 Overnight Visitors (n=1,314)
- 2015 Day Visitors (n=808)
- 2016 Day Visitors (n=798)
- 2017 Day Visitors (n=808)

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.

Primary Regional Destination of Overnight Visitors



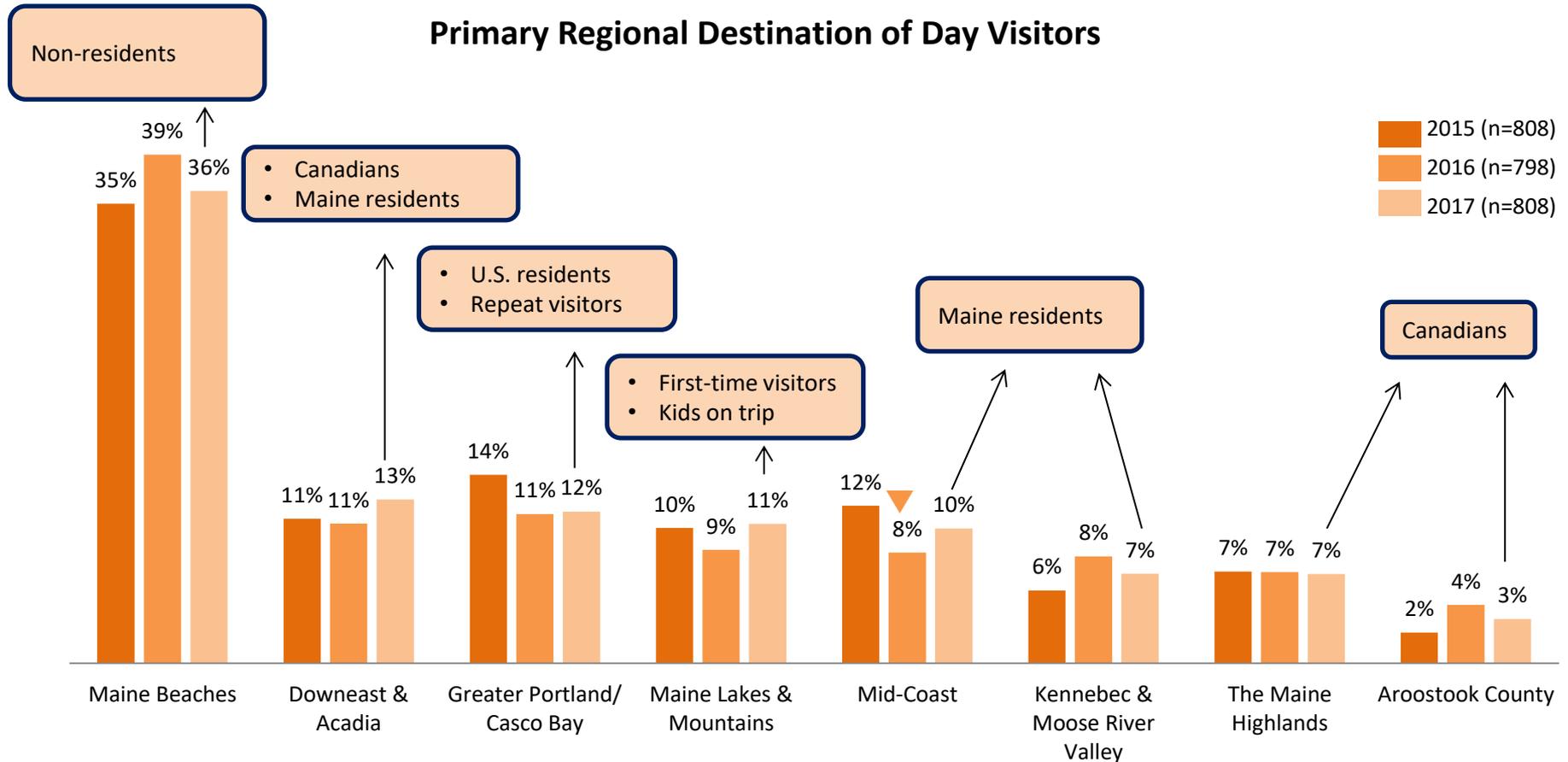
Overnight Q28. What region in Maine was your primary destination?

▲▼ notes significant difference from the 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.



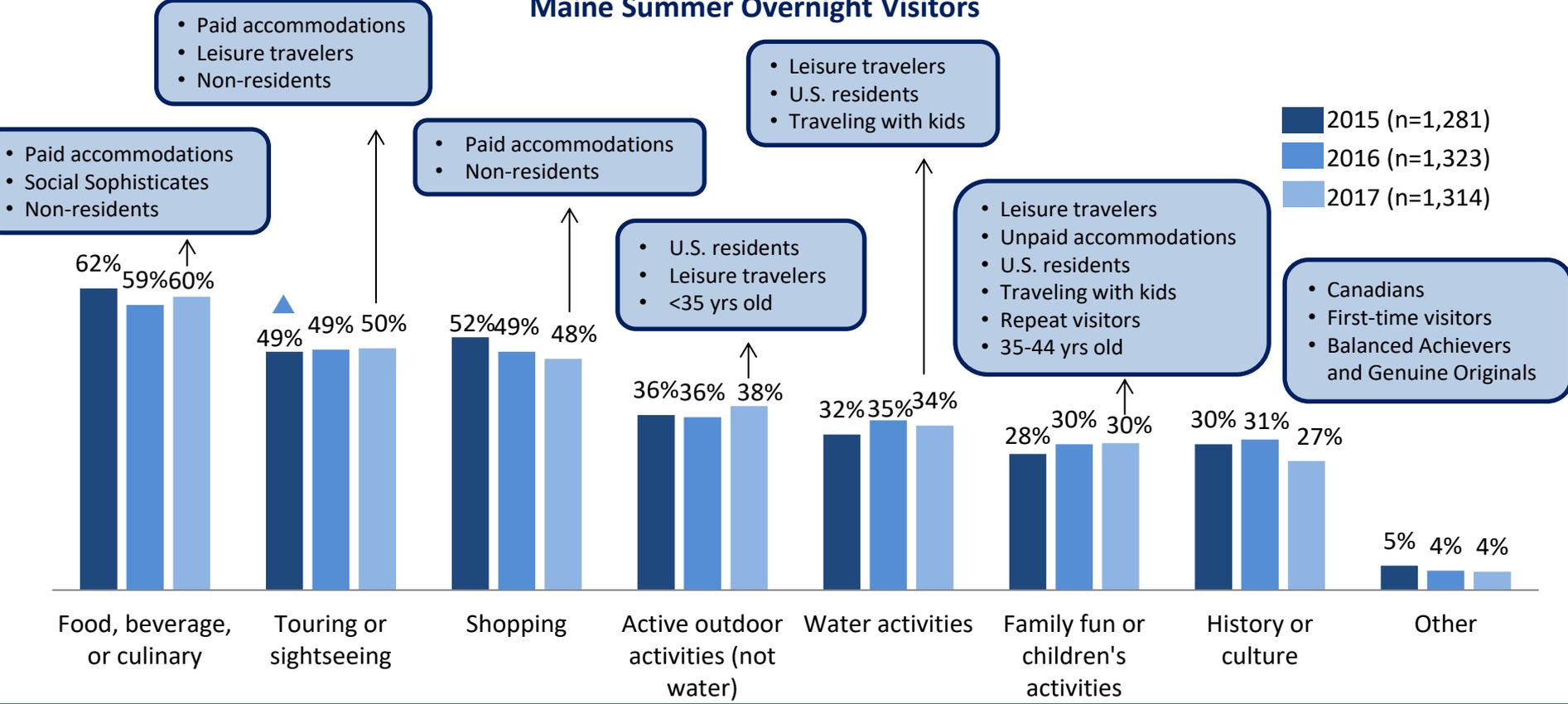
Day Q21. What region in Maine was your primary destination?

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

Most 2017 overnight summer visitors were interested in exploring Maine’s various food/beverage/culinary options, touring/sightseeing or shopping.

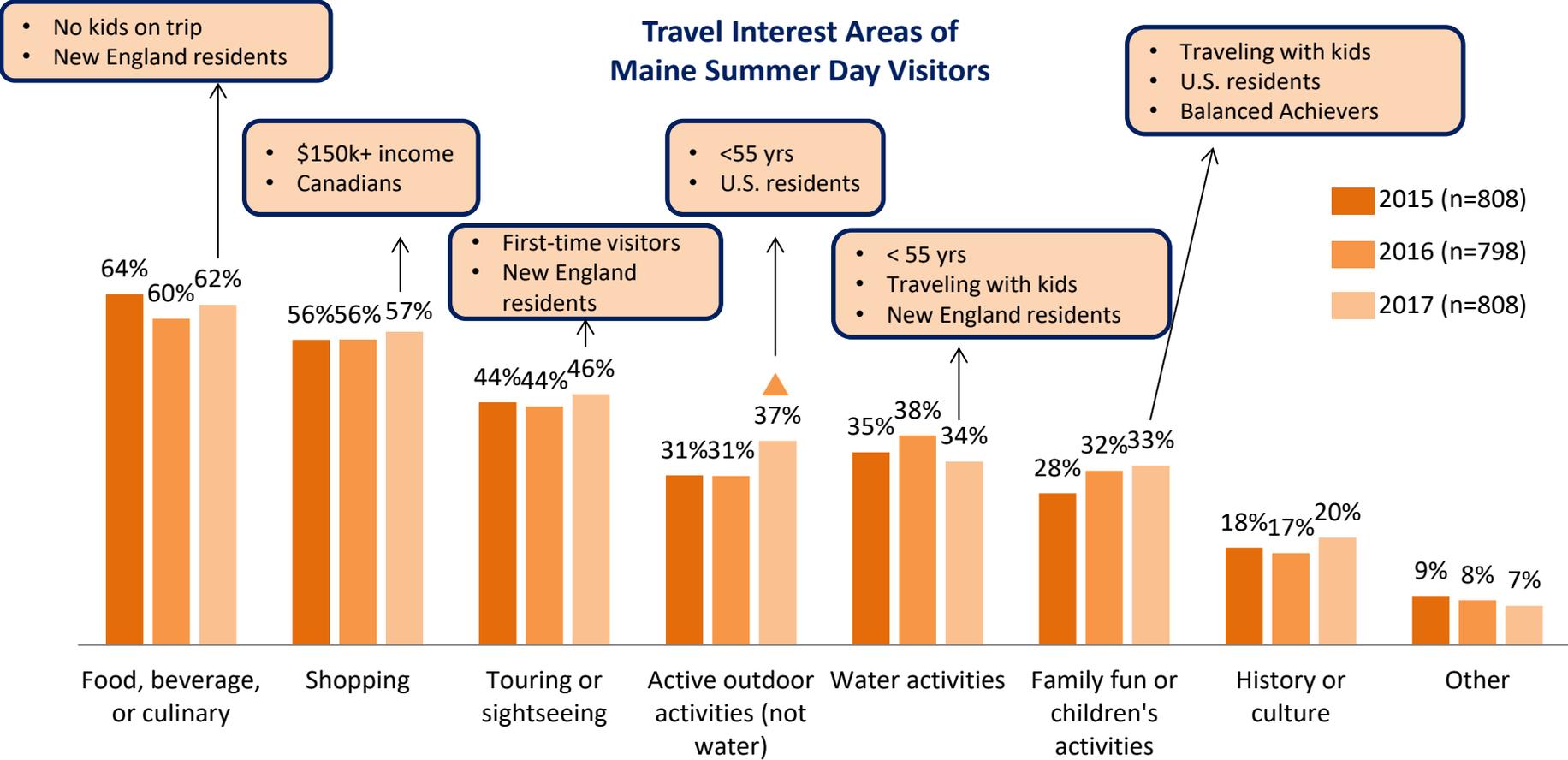
- The proportion of overnight summer visitors interested in the various types of activities remains consistent with the prior two summer seasons.
- Among Maine’s overnight visitors, there are certain sub-groups that are more likely to be interested in specific activities as noted below.

Travel Interest Areas of Maine Summer Overnight 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.

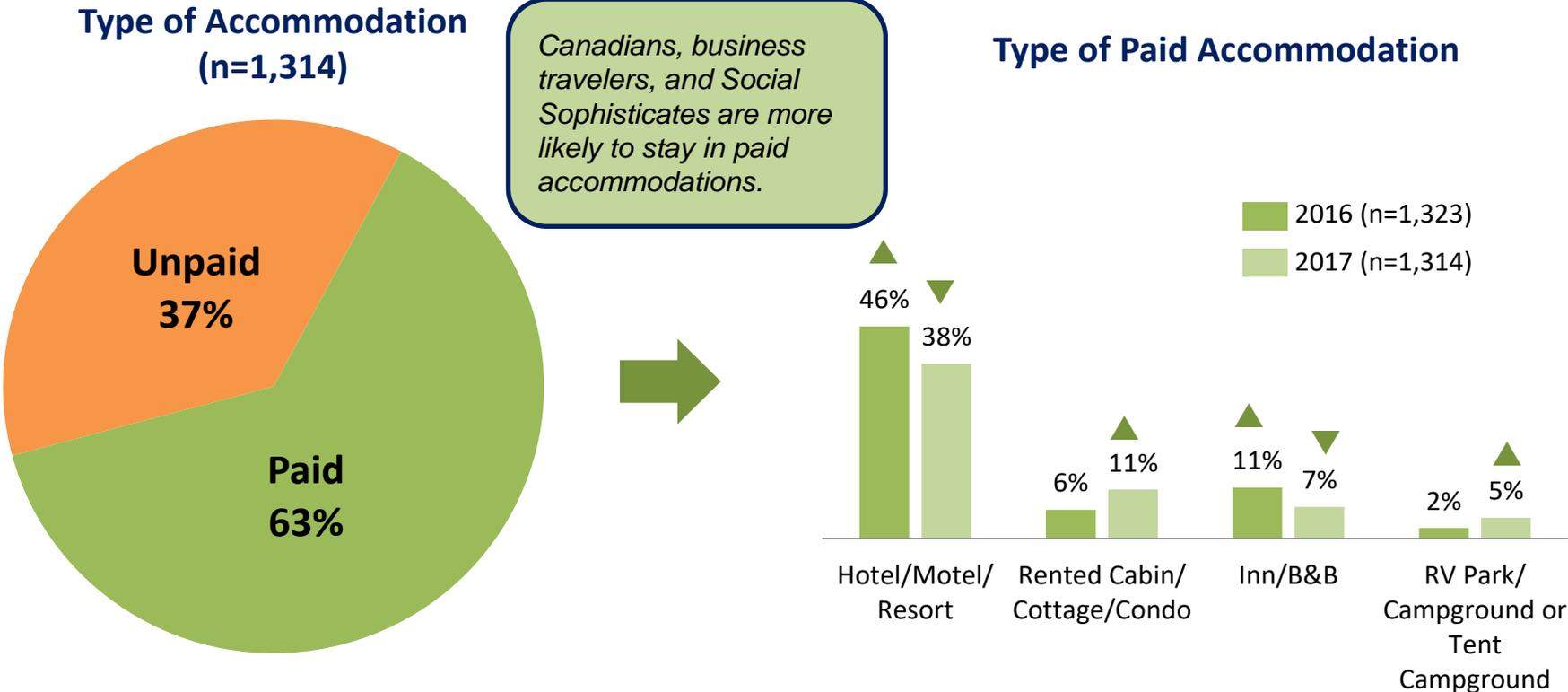


Q18: Which of the following interest areas did you want to pursue during this trip to Maine?

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

Nearly two-thirds of overnight summer visitors are staying in paid accommodations while in Maine.

- On average, overnight visitors are staying in Maine for 3 or 4 nights. Canadians and those traveling with children stay in Maine longer, on average (4.4 nights and 3.9 nights, respectively).



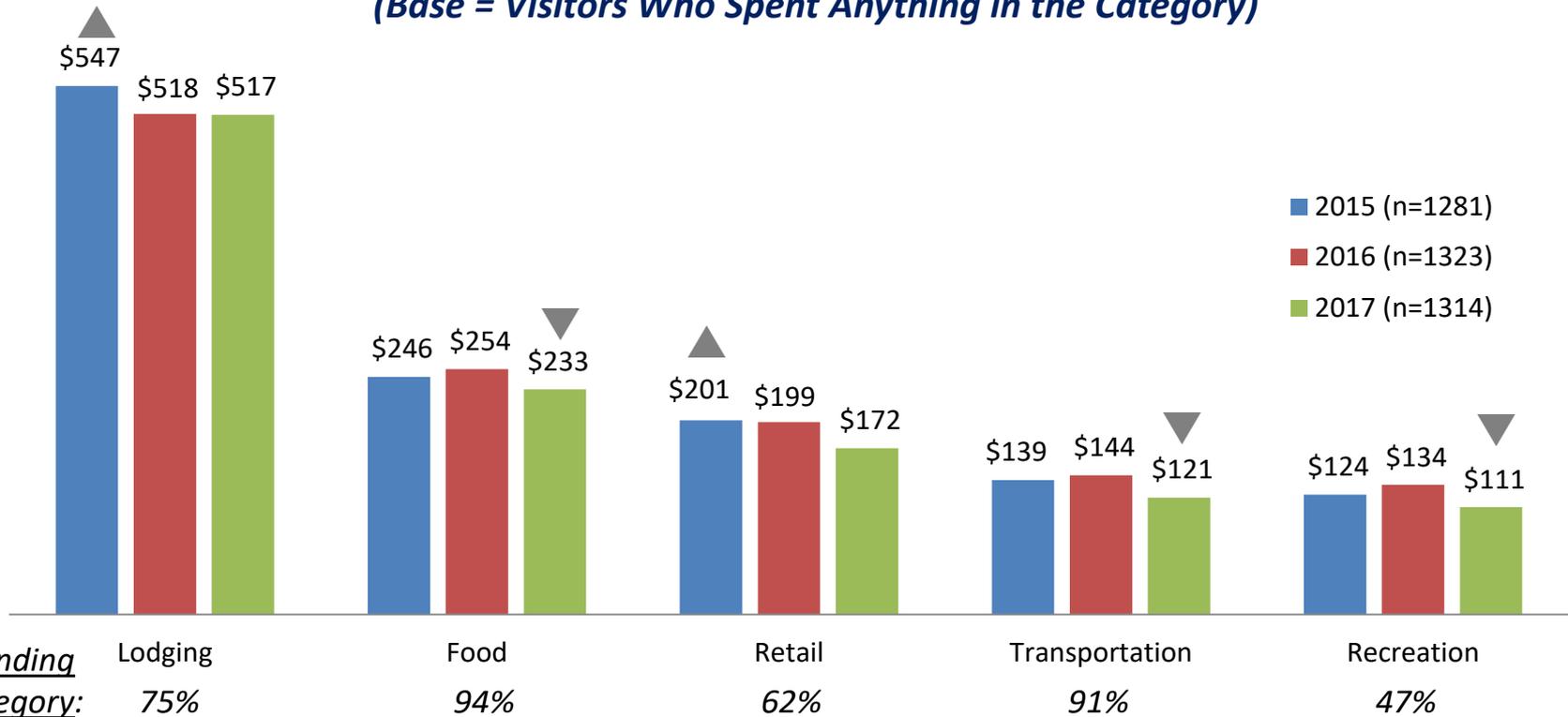
Average Length of Stay: 3.5 Nights

Overnight Q10. On this trip to Maine, how many nights were you away from home?
 Overnight Q27. In which of the following types of accommodations did you spend the most nights on this trip to Maine?
 ▲▼ notes significant difference from the prior year at the 95% confidence level



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

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



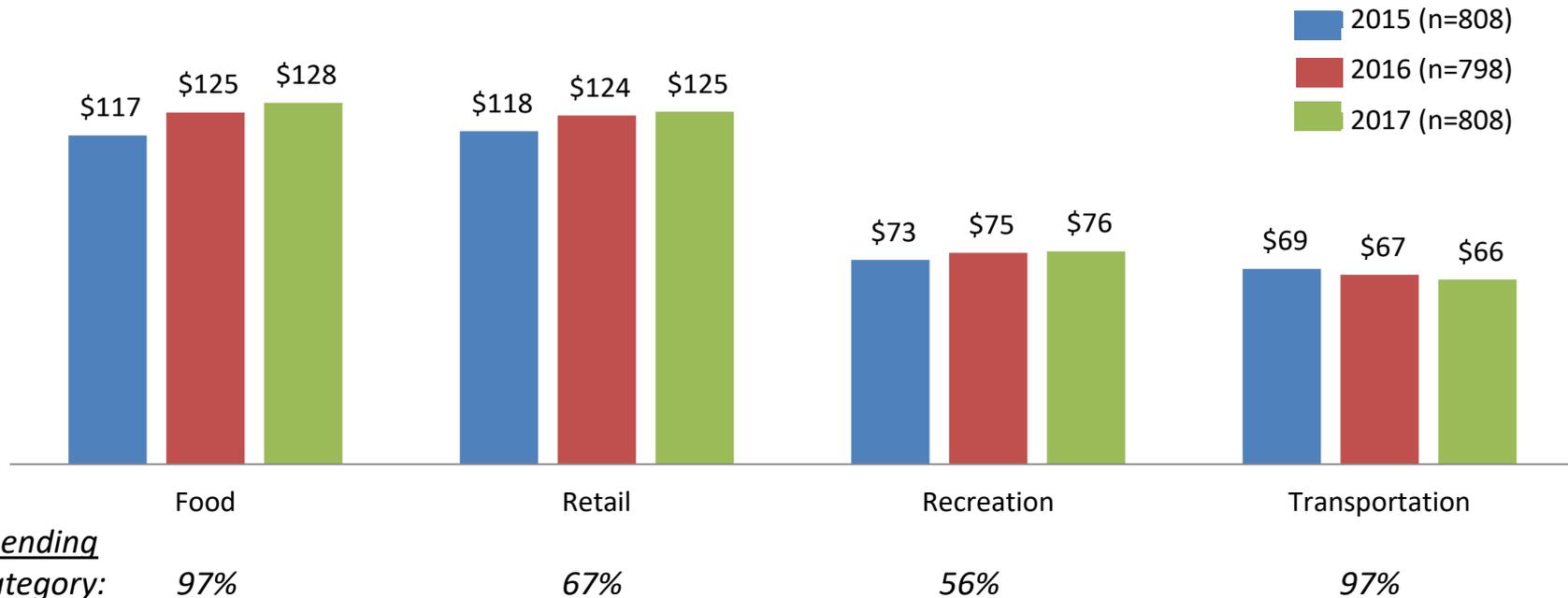
*Reported figures represent the average amount of money spent per travel party, excluding parties who did NOT spend money in that expenditure category. This differs from previous years, where the average amount spent was based on all travelers, including those who did not spend money in the category.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

Overnight Q38. 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 from the prior year at the 95% confidence level

Day visitors spend the most on *food and retail* 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 years, 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.

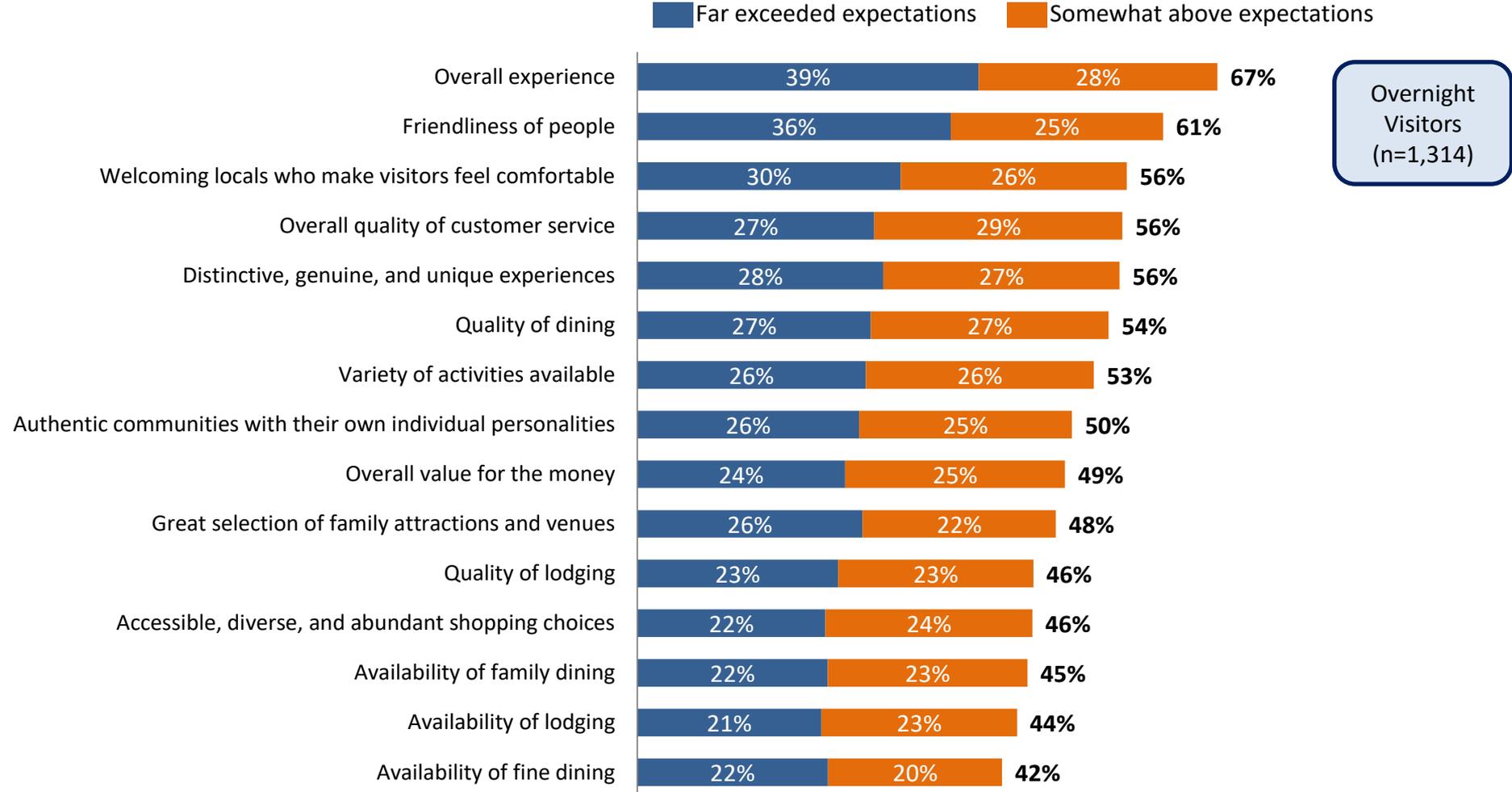
Day Q27. Please tell us the total amount of money you and your immediate travel party spent on this trip in Maine in each of the categories listed below.

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

Trip Evaluation

Two-thirds of summer overnight visitors found their *overall experience* visiting Maine to have exceeded their expectations.

Evaluation of Trip Expectations for Overnight Visitors

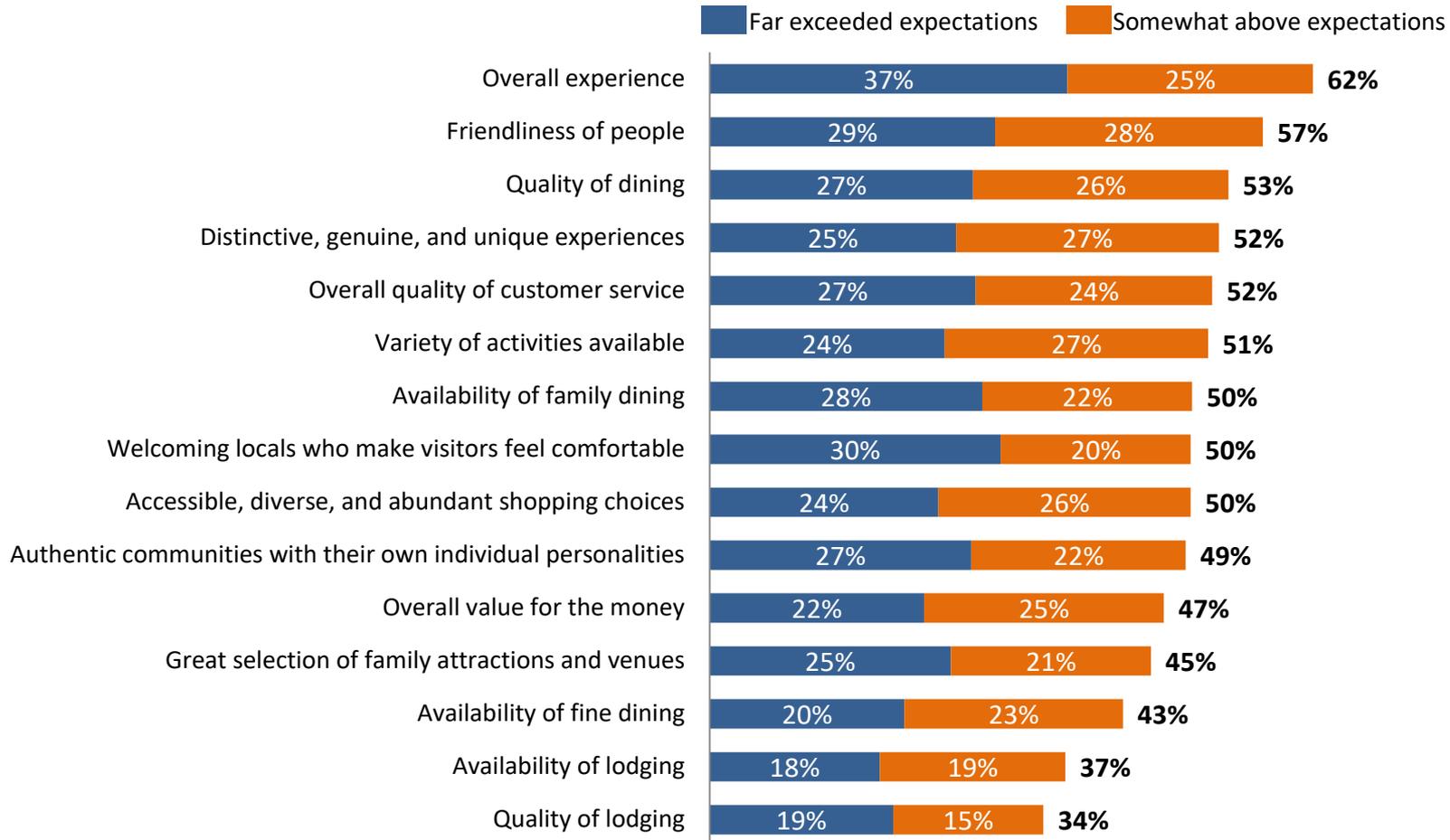


Overnight Q41: Using the scale provided in the table below, please indicate whether this most recent trip to Maine exceeded, matched, or fell below your expectations for each of the listed items.

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

- Compared to Canadian day visitors, domestic day visitors are more likely to indicate that their trip in Maine exceeded their expectations in most categories

Evaluation of Trip Expectations for Day Visitors



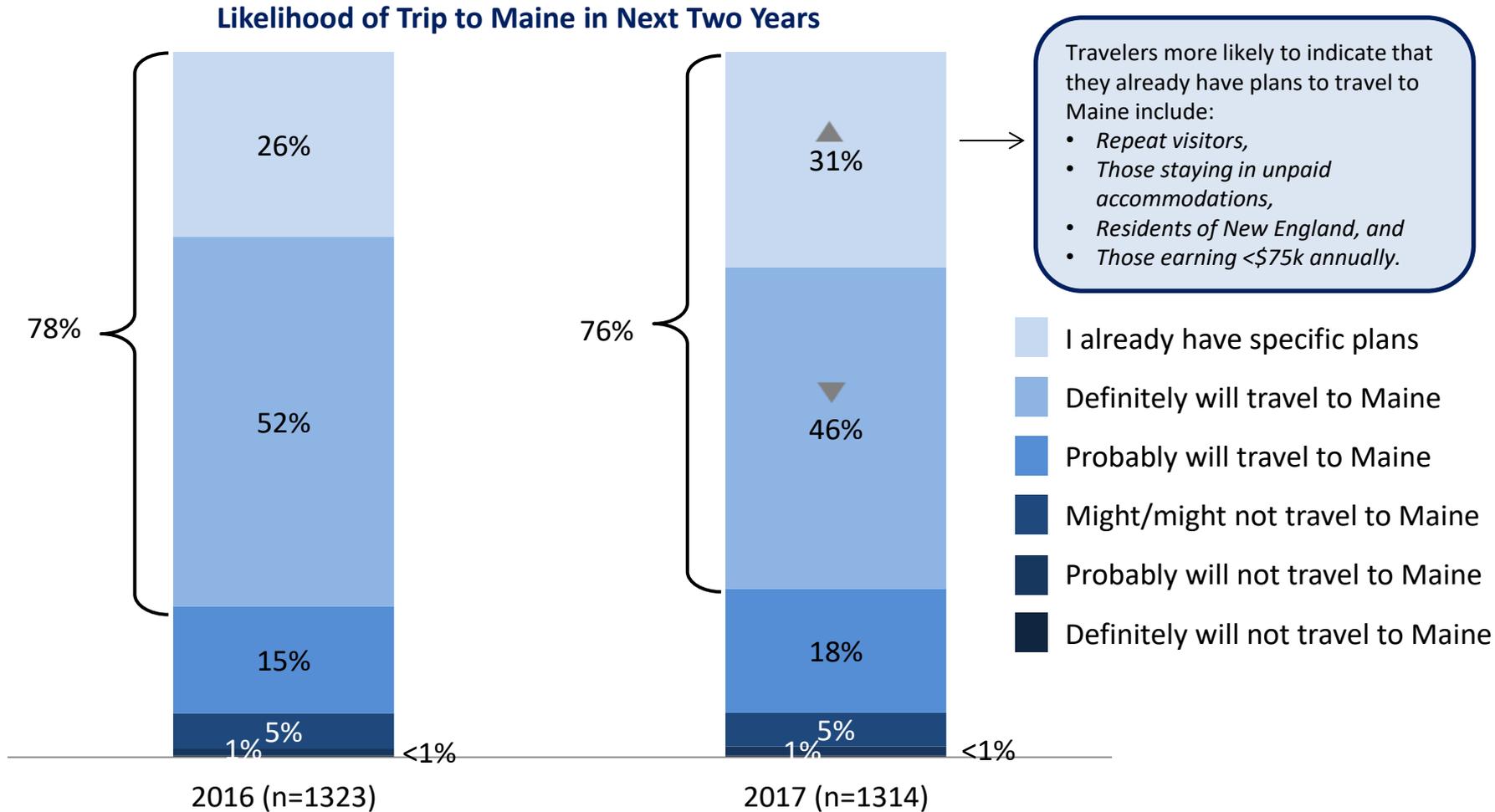
Day Visitors
(n=808)

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

Three-fourths of overnight summer visitors say they already have specific plans to visit Maine or definitely will visit in the next two years.

- 2017 saw an increase in the proportion of summer overnight visitors who indicate that they *already have specific plans to visit Maine* again in the next two years.

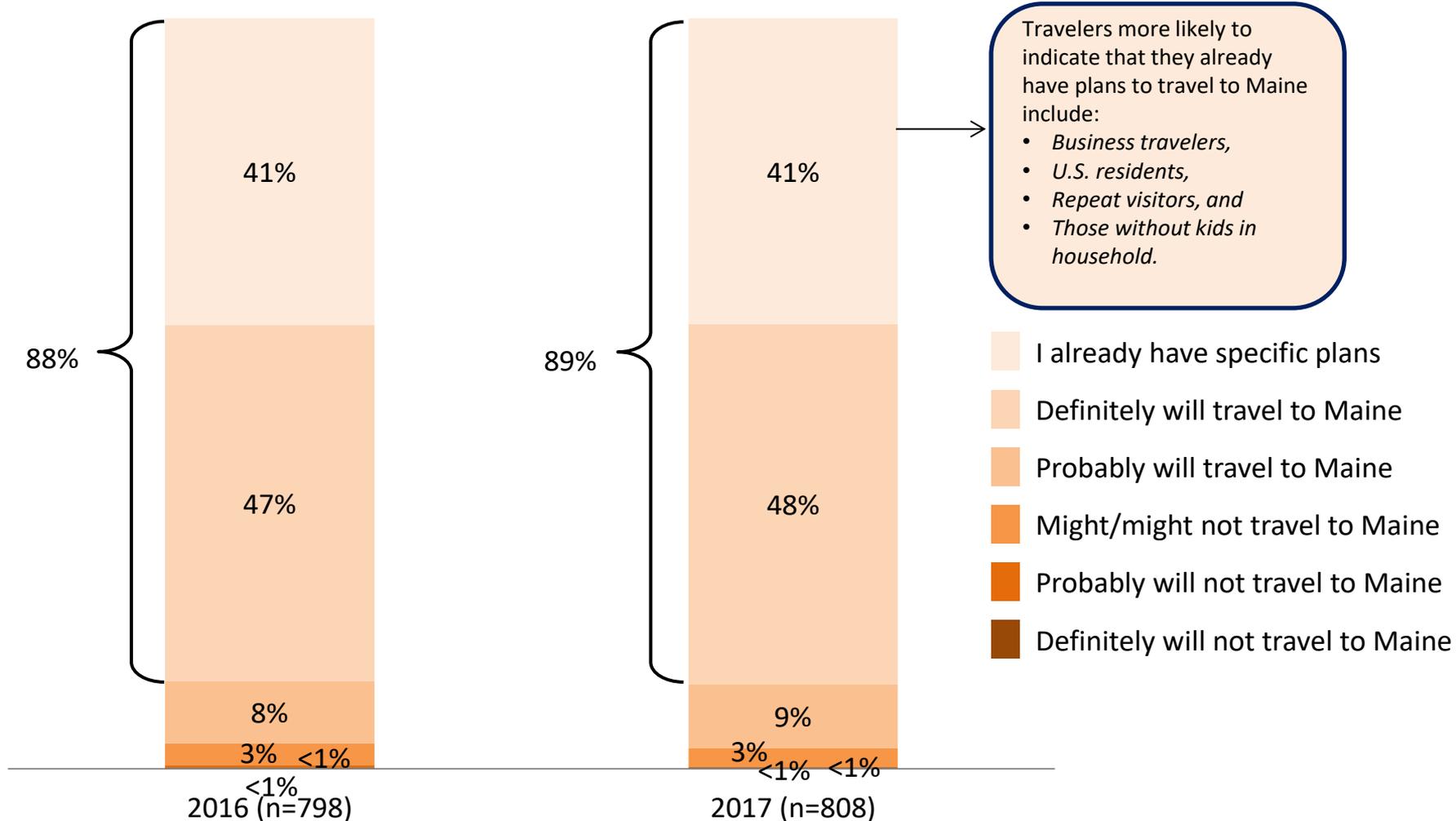


Overnight Q44. How likely will you be to travel in Maine in the next two years?

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

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

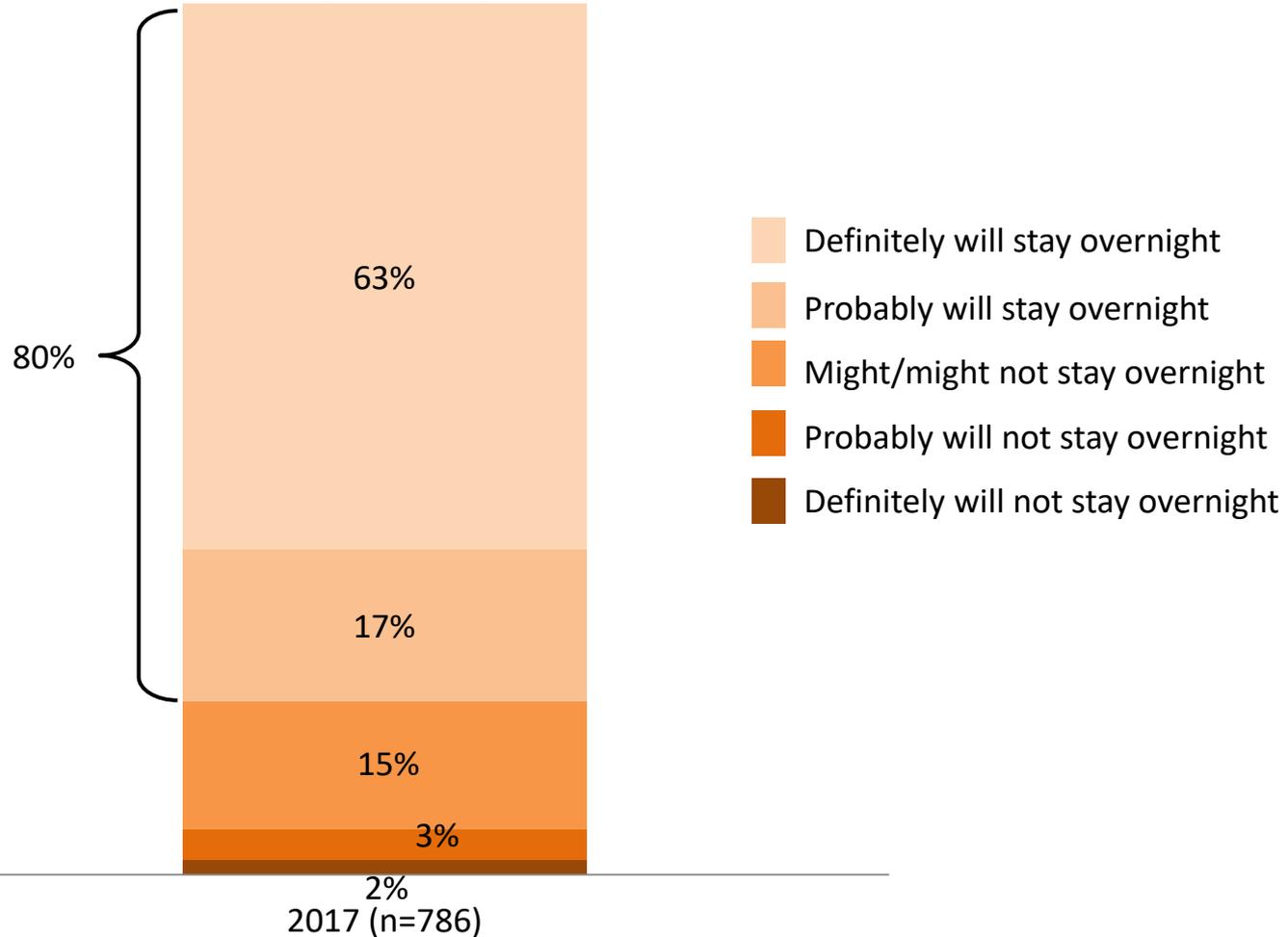


Day Q31. How likely will you be to travel in Maine in the next two years?

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

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.

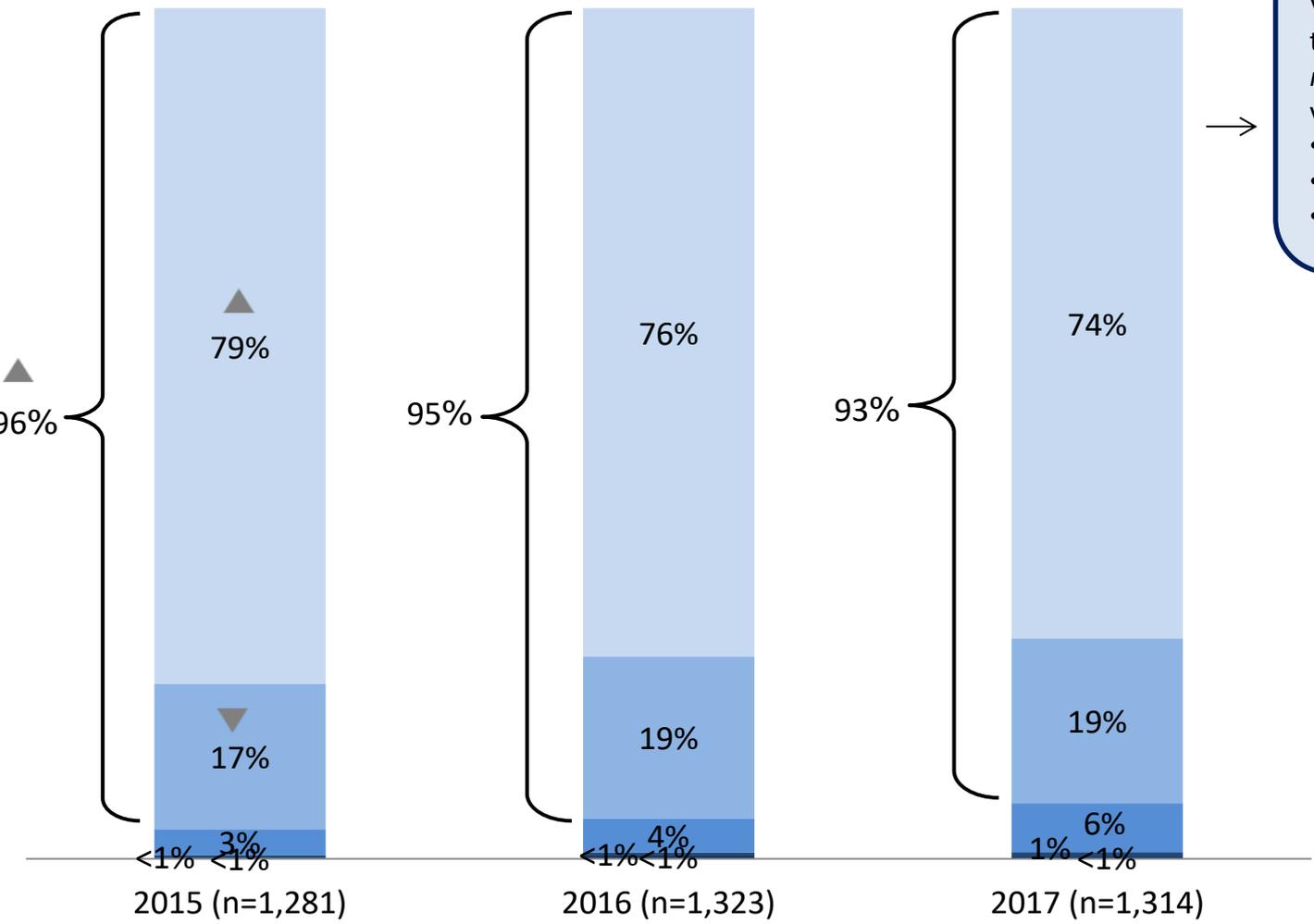
Likelihood of Staying Overnight in Maine in Next Two Years (Day Visitors)



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.

Likelihood of Recommending Maine as a Vacation Destination



Visitors more likely to indicate that they *definitely will* recommend Maine as a vacation destination include:

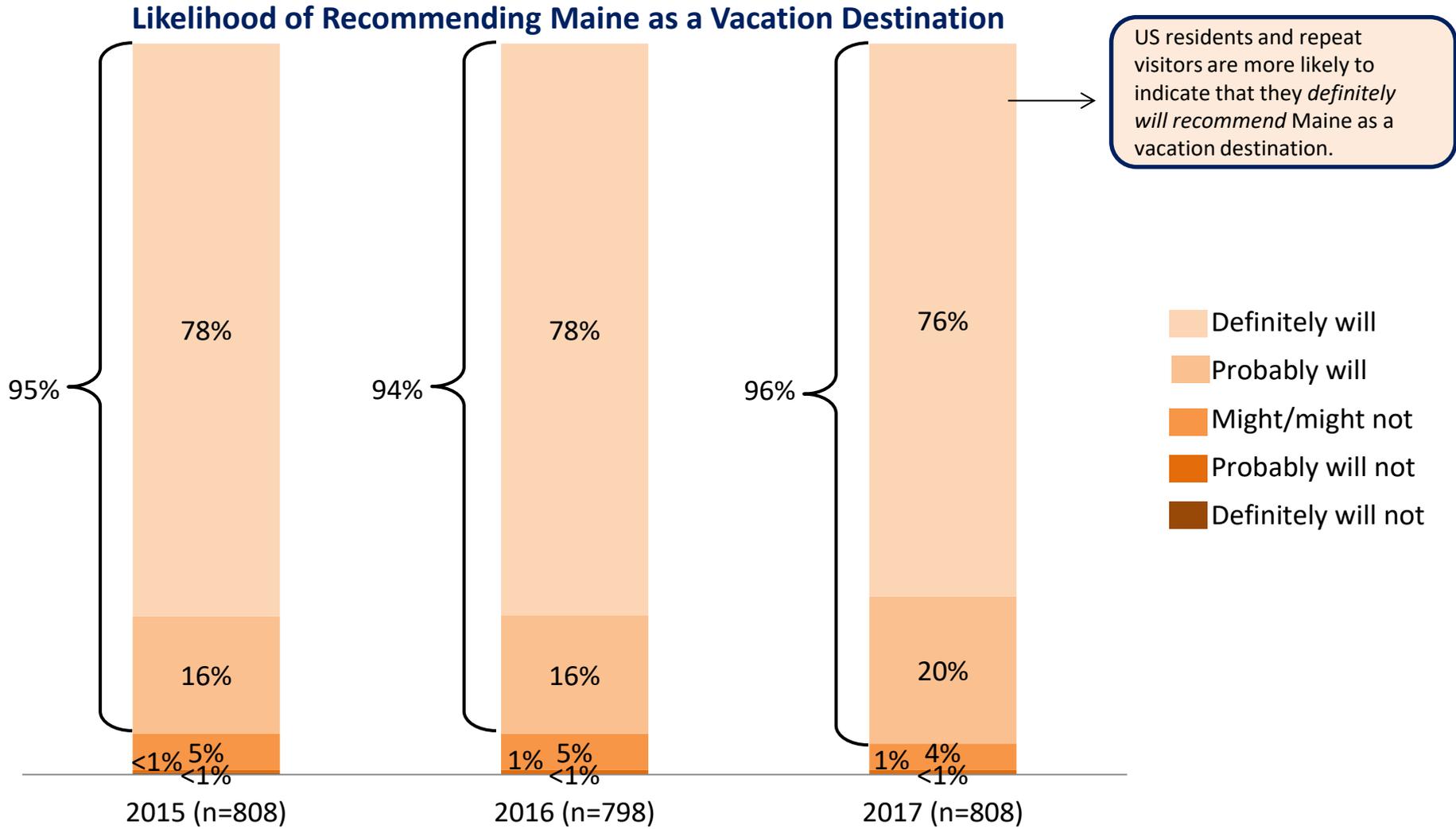
- U.S. residents,
- Repeat visitors, and
- Those over the age of 35.

- Definitely will
- Probably will
- Might/might not
- Probably will not
- Definitely will not

Overnight Q45: How likely are you to recommend Maine as a vacation destination to friends or relatives?

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

Day visitors are 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?

▲ ▼ notes significant difference from the 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.
- 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

- Three consumer segments were defined as high-priority segments for the Office of Tourism as a result of the market segmentation research:
 - **Balanced Achievers**
 - **Genuine Originals**
 - **Social Sophisticates**
- This Appendix provides a topline profile and comparison of these priority segments as they relate to Maine's Summer visitors.
- ***Important Note:*** *Sample sizes are relatively low in this seasonal analysis for the Social Sophisticates segment of the Day Visitors. Please use caution in interpreting the findings for this segment.* At the completion of the 2017 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 Mid-Atlantic (overnight)
- Least likely from New England (overnight)
 - Most likely to be first-time visitors
- Most likely to show interest in *family fun/children's activities* (day visitors)

Genuine Originals:

- Largest % of visitors
- Among the oldest
- Least likely to show interest in *shopping or family fun/children's activities*
- Spend less overall (overnight visitors)

Social Sophisticates:

- Smallest % of visitors
- Least likely to show interest in *history/culture*
- Most likely to show interest in *food/beverage/culinary activities*
- Most likely to stay in paid accommodations

Maine’s Summer 2017 visitors are mostly categorized as either *Balanced Achievers* or *Genuine Originals*.

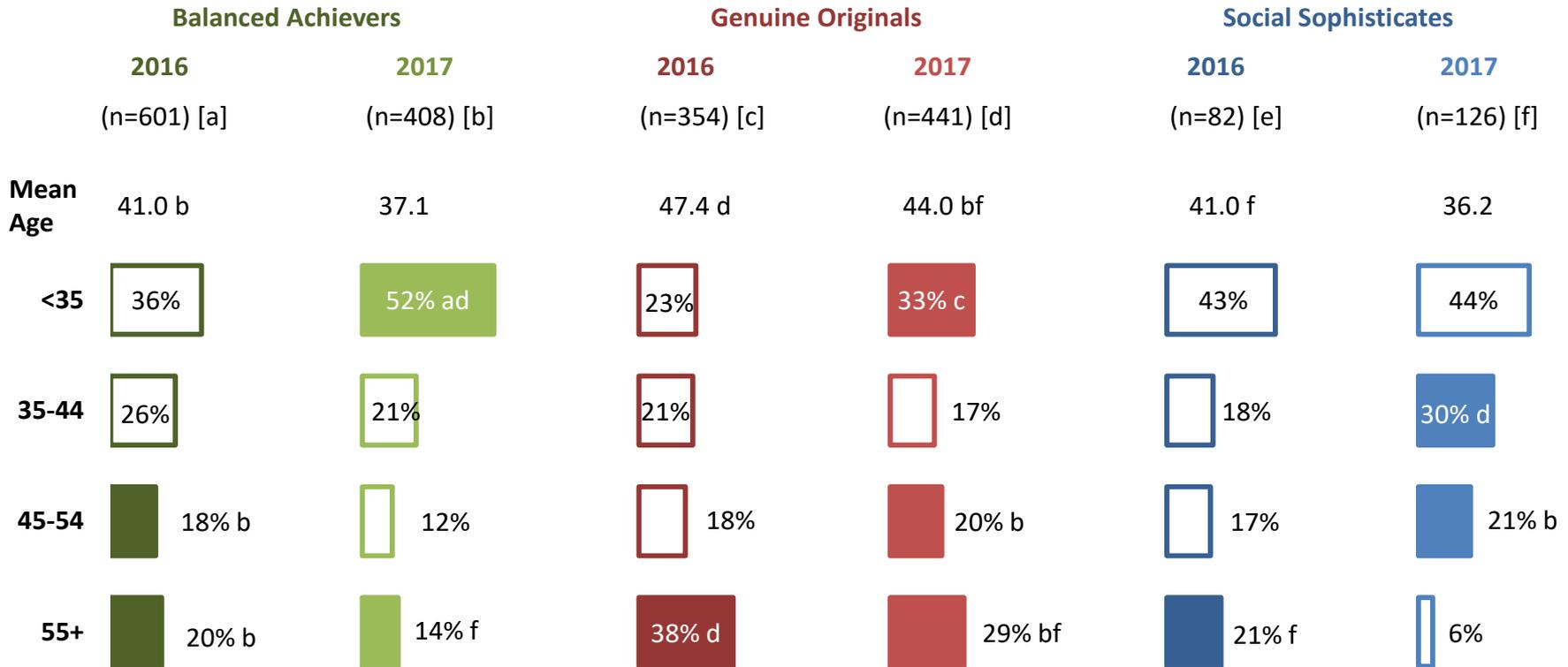
Summer Visitor Segments

	Overnight Visitors		Day Visitors	
	2016 (n=1323)	2017 (n=1314)	2016 (n=798)	2017 (n=808)
Balanced Achievers	45%▲	31%▼	27%	28%
Genuine Originals	27%▼	34%▲	34%	30%
Social Sophisticates	6%▼	10%▲	9%	7%

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

2017 Summer Season
(May – Aug 2017)

Age of Summer Overnight Visitors by Visitor Segment



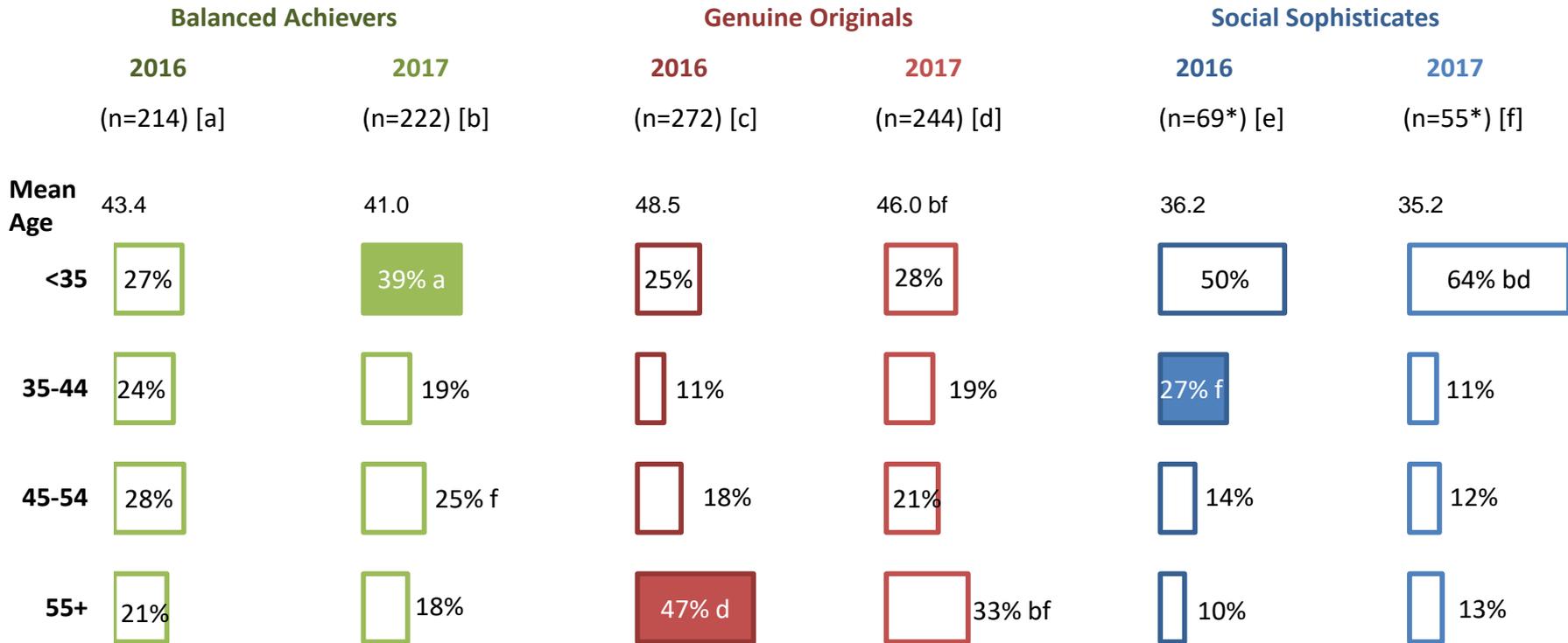
Overnight/Day Q1. How old are you?

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

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

2017 Summer Season
(May – Aug 2017)

Age of Summer Day Visitors by Visitor Segment



Overnight/Day Q1. How old are you?

*Please note small sample size. Use caution when interpreting results.

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

Overnight visitors categorized as *Balanced Achievers* are the least likely to be from New England and the most likely to be from the Mid-Atlantic, as compared to those categorized as *Genuine Originals* or *Social Sophisticates*.

State/Province of Origin by Visitor Segment: Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2016 (n=601) [a]	2017 (n=408) [b]	2016 (n=354) [c]	2017 (n=441) [d]	2016 (n=82) [e]	2017 (n=126) [f]
United States (NET)	86%	87%	90%	94% b	85%	93%
New England (NET)	30%	53% a	48%	70% bc	40%	70% be
Massachusetts	18%	22%	24%	31% bc	28%	37% b
Maine	2%	15% a	3%	15% c	2%	12% e
New Hampshire	1%	5% a	8%	8%	1%	11% e
Connecticut	5%	6%	7%	8%	8%	5%
Vermont	1%	3%	3%	5% bf	1%	1%
Rhode Island	3%	3%	3%	2%	--	3%
Mid-Atlantic (NET)	56% b	35% df	43% d	24%	45% f	23%
New York	23% b	16%	16%	12%	18%	15%
New Jersey	13% bdf	9%	8%	4%	8%	3%
Pennsylvania	15% bf	8%	12% d	5%	13% f	2%
Maryland	4% b	2%	5%	3%	5%	2%
Delaware	1%	<1%	2%	1%	--	1%
Canada (NET)	14%	13% d	10%	6%	15%	7%
Ontario	7%	8%	6%	5%	6%	4%
Quebec	4%	2%	1%	1%	6%	3%
New Brunswick	1%	1%	1%	<1%	3%	1%

Q2. State/Province of Residence

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

The proportion of day visitors arriving from each state or province shows very little variation by visitor segment.

State/Province of Origin by Visitor Segment: Day Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2016 (n=214) [a]	2017 (n=222) [b]	2016 (n=272) [c]	2017 (n=244) [d]	2016 (n=69*) [e]	2017 (n=55*) [f]
United States (NET)	79%	88% a	91%	92%	79%	88%
Massachusetts	41%	38%	44% d	32%	47%	43%
Maine	22%	28%	27%	33% f	14%	17%
New Hampshire	12%	18%	17%	22%	14%	21%
Rhode Island	1%	2%	1%	2%	3%	6%
Vermont	3%	1%	1%	3%	1%	--
Canada (NET)	21% b	12%	9%	8%	21%	12%
New Brunswick	4%	4%	5%	5%	11%	9%
Quebec	15% b	8%	3%	3%	9%	4%
Nova Scotia	2%	<1%	1%	<1%	1%	<1%

Q2. State/Province of Residence

* Please note small sample size. Use caution when interpreting results.

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

Overnight regional visitation patterns do not differ significantly by visitor segment.

Primary Regional Destination by Visitor Segment: Overnight Visitors

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2016 (n=601) [a]	2017 (n=408) [b]	2016 (n=354) [c]	2017 (n=441) [d]	2016 (n=82) [e]	2017 (n=126) [f]
Maine Beaches	21%	21%	26%	26%	40%	36%
Maine Highlands	18%	15%	7%	8%	7%	8%
Mid-Coast	11%	12%	13%	13%	14%	9%
Downeast & Acadia	18%	14%	19%	18%	14%	16%
Greater Portland/Casco Bay	6%	11% a	14%	13%	11%	11%
Maine Lakes & Mountains	12%	14%	14%	12%	7%	9%
Kennebec Valley	7%	6%	6%	6%	3%	7%
Aroostook County	5%	4%	2%	3%	4%	3%

Overnight Q28. What region in Maine was your primary destination?

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

Summer day visitors also show very few differences in the regions visited based on their visitor segment categorization.

Primary Regional Destination of Day Visitors By Visitor Segment

	Balanced Achievers		Genuine Originals		Social Sophisticates	
	2016 (n=214) [a]	2017 (n=222) [b]	2016 (n=272) [c]	2017 (n=244) [d]	2016 (n=69*) [e]	2017 (n=55*) [f]
Maine Beaches	39%	35%	35%	38%	45%	41%
Mid-Coast	7%	7%	8%	8%	10%	16%
Greater Portland/Casco Bay	10%	12%	15%	12%	11%	16%
Maine Lakes & Mountains	10%	16% f	10%	10%	8%	3%
Downeast & Acadia	13%	11%	11%	18%	5%	10%
Kennebec Valley	9%	5%	9%	7%	7%	6%
Maine Highlands	7%	8%	7%	3%	8%	4%
Aroostook County	5%	2%	5%	3%	6%	3%

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

* Please note small sample size. Use caution when interpreting results.

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



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