

Maine Office of Tourism Visitor Tracking Research 2010 Fall Season Topline Report

Prepared by



January 31, 2011



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Introduction and Methodology



Introduction

- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors.
- This research program was designed to:
 - Profile Maine visitors in demographic terms as well as in their travel patterns;
 - Explore perceptions of Maine among visitors;
 - Describe both seasonal and regional visitation patterns of Maine visitors;
 - Explore what Maine visitors like and dislike about the locations in Maine they have visited; and
 - Estimate levels of spending in Maine by residents and non-resident visitors.

Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the Research Now* national online panel. Data is collected on an ongoing basis.
- Information is gathered using three main surveys:
 - Regional Travel Survey
 - Maine Day Visitor Survey
 - National Omnibus Survey

Methodology

- Regional Travel Study
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada; and have taken an overnight trip in Maine during the past four weeks.
- Maine Day Visitor Study
 - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who have taken a day trip in Maine within the past four weeks.
- National Omnibus Study
 - Includes a nationally balanced sample of US residents; and
 - Used to determine the incidence of travel nationwide and Maine's share of that travel.

Methodology

- This topline report outlines results from travel occurring between mid-September and November 2010. It also compares to data collected during the fall 2009 and fall 2008 seasons.
- Data was collected between October 1, 2010 and December 15, 2010. The number of completed surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 713
 - Maine Day Visitor Survey – 524
 - National Omnibus Survey – 4,303
- The report summarizes key measures from data collected for the fall 2010 season. A full analytic report will be provided at the end of July 2011. Some seasonal adjustments may be made in the annual report.
- Whenever possible, fall 2010 data was compared to fall 2009 and fall 2008 data to show significant year-over-year differences.

Research Context

- **Weather:**

- Although the weather in fall 2010 was not vastly different from normal, it was a bit warmer than the historical average, and, particularly in October there was a bit more rain than normal.

	September	October	November
Average Temperature (vs. 140-year average)	63.4 (+4.7)	49.4 (+1.7)	48.2 (+1.1)
Measured Precipitation in Inches (vs. 140-year average)	2.30 (-1.07)	7.11 (+2.71)	5.00 (+.28)
(NOAA.gov)			

- **Economy:**

- **Consumer Confidence:** The Conference Board Consumer Confidence Index®, continued to remain in the 50s, reaching 54.3 in November, but dropping slightly to 52.5 in December (1985=100). This shows slight improvement over fall 2009 as consumers slowly regain some confidence in the economy. (Conference Board)

Research Context

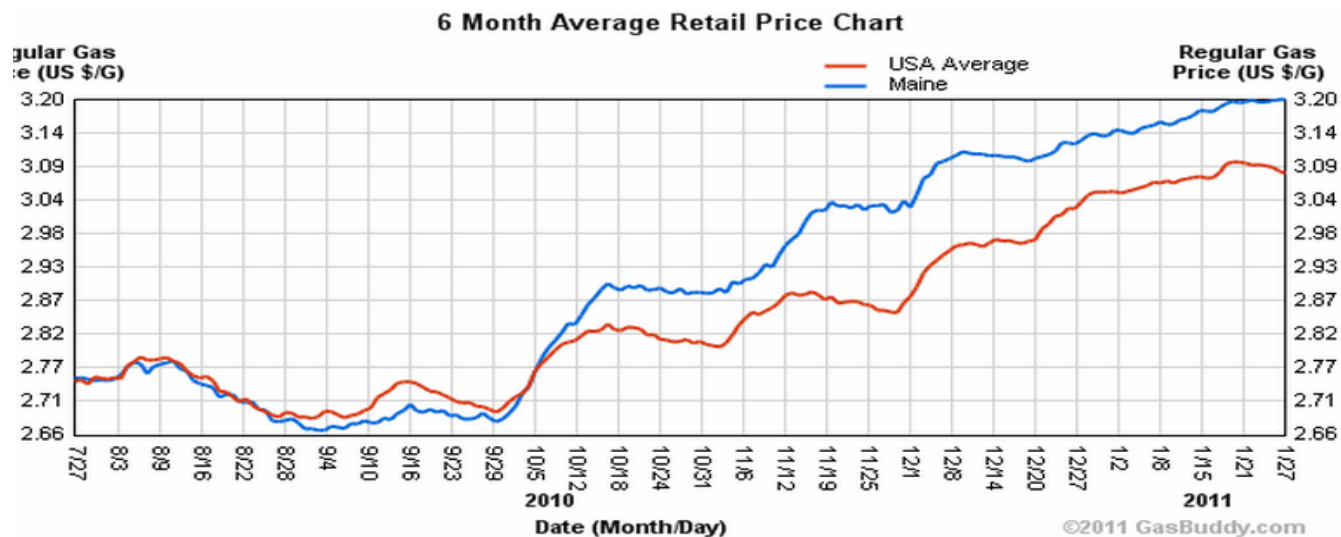
- **Economy:**

- **Employment:** Regional and state unemployment rates were generally little changed in December. Twenty states recorded unemployment rate increases, 15 states and the District of Columbia registered rate decreases, and 15 states had no rate change. As of December, the national unemployment rate remained around 9.4%. (Bureau of Labor Statistics)
- **Canadian Dollar:** The Canadian Dollar remains strong, with the exchange rate averaging about 1.01 Canadian Dollars to the U.S. Dollar during the fall of 2010.



Research Context

- **Gas Prices:** The average price for a gallon of gas in the US rose from \$2.71 to \$3.09 in fall 2010. This figure is even higher for Maine, with the average price climbing as high as \$3.20 per gallon. While the fall visitation data does not show this increase in gas prices as having much impact yet, it is something to watch over the coming months if gas prices continue to climb.

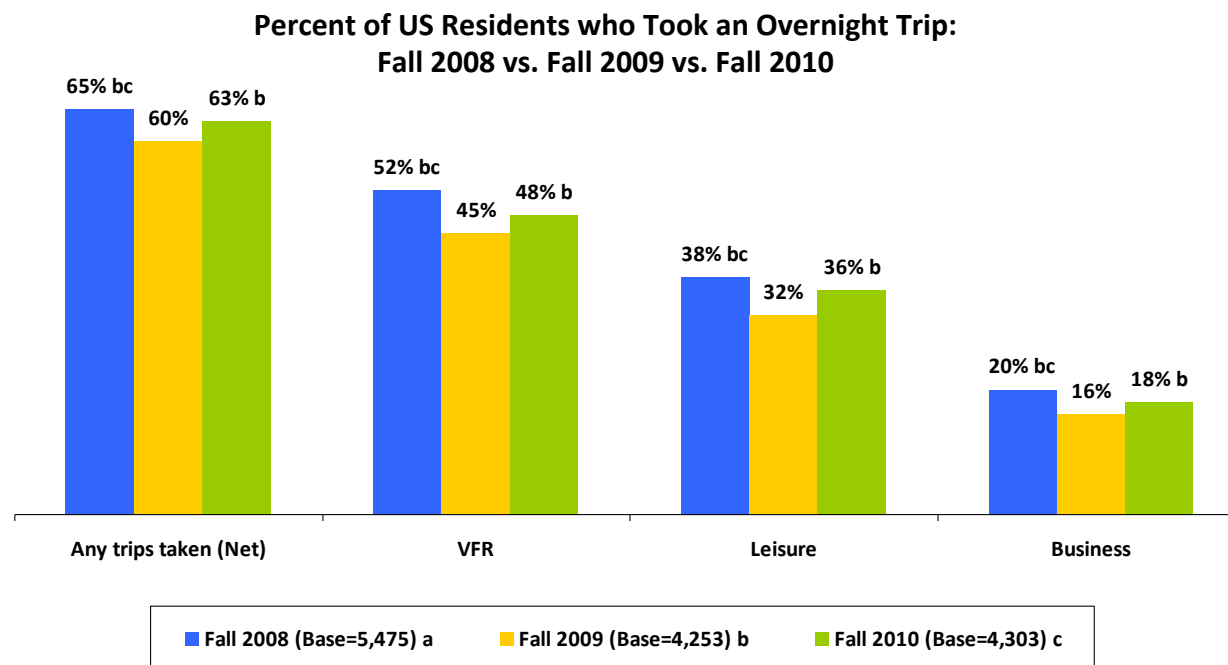


Maine's Overnight Travel Market Share



National Overnight Travel Context

- On a national level, there were year-over-year increases in VFR, leisure, and business travel during fall 2010. After decreases in all categories in fall 2010, this is a sign that travel is slowly moving back towards 2008 levels.



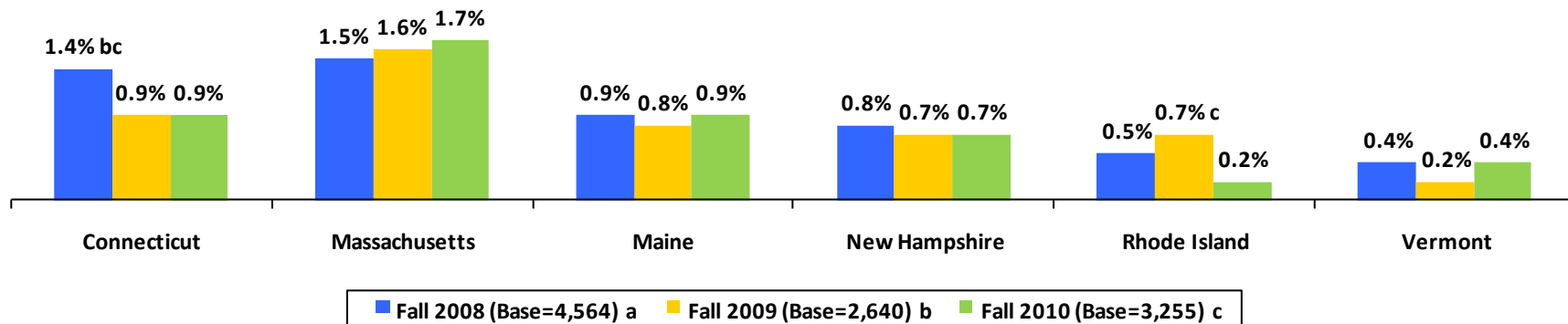
a,b,c significant difference at the 95% confidence level

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?

Maine's Overnight Market Share Compared to New England – *Leisure Travel*

- Generally, travel shares remained constant or increased as compared to 2009. Maine's leisure travel share returned to the fall 2008 level.
- Rhode Island was the only New England state which shows a significant decline in leisure travel share from fall 2010 to fall 2009.

US Leisure Travel Market Share*



a,b,c notes significant difference at the 95% confidence level.

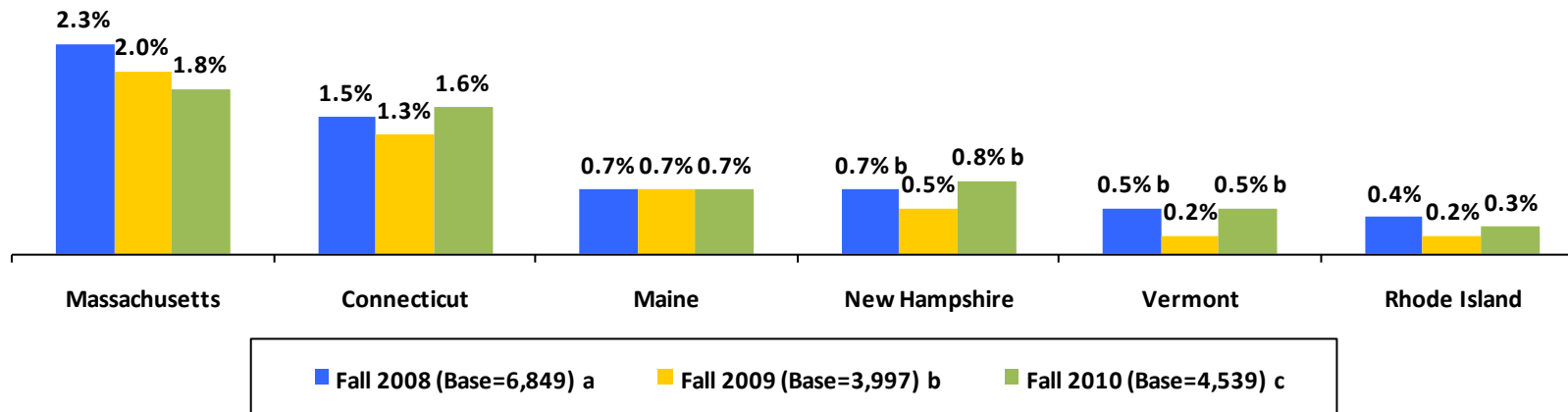
Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips?

*Share of total trips taken by U.S. residents,

Maine's Overnight Market Share Compared to New England – VFR Travel

- Maine's share of VFR travel also remained stable in fall 2010 when compared with past years.
- In contrast, both New Hampshire and Vermont saw statistically significant increases in VFR travel share during fall of 2010.

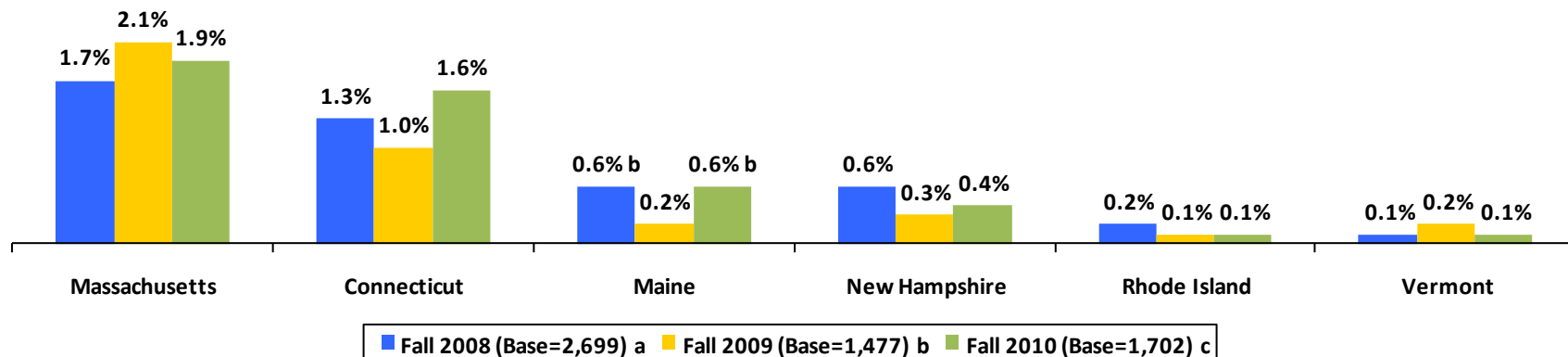
US Travel to Visit Friends/Relatives Market Share*



Maine's Overnight Market Share Compared to New England – *Business Travel*

- Maine business travel returned to fall 2008 levels, recovering from a dip in fall 2009.
- Business travel among other New England states has remained stable in fall 2010.

US Business Travel Market Share*



a,b,c indicates significant difference at the 95% confidence level

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.

Fall Visitation to Maine



Estimated Visitation to Maine*

- There were an estimated 2.2 million overnight trips to Maine in fall 2010, resulting in 5.3 million overnight visitors. This represents a 5.1% year-over-year increase in the number of visitors to the state in fall 2010.
- Similar to the year-over-year increase in overnight visitation, there was a 3.4% increase in day visitors in fall 2010. This increase resulted in a total of 3.7 million day visitors during this period.

Overnight Visitation					
	Leisure	VFR	Business	Total	2009 v. 2010
Overnight Trips	931,819	962,879	341,667	2,236,365	+2.0%
Overnight Visitors	2,506,593	2,127,964	683,334	5,317,890	+5.1%
Day Visitation					
	Leisure	VFR	Business	Total	2009 v. 2010
Day Trips	752,232	440,291	367,180	1,559,703	+1.1%
Day Visitors	1,963,324	1,091,922	613,191	3,668,530	+3.4%

**Note: Visitation estimates provided here are preliminary and reflect visitation between mid-September through November. Adjustments may be made to these estimates in the annual report to account for seasonal fluctuations.*

Maine Travel Profile Overnight and Day Visitors



Visitor Profile



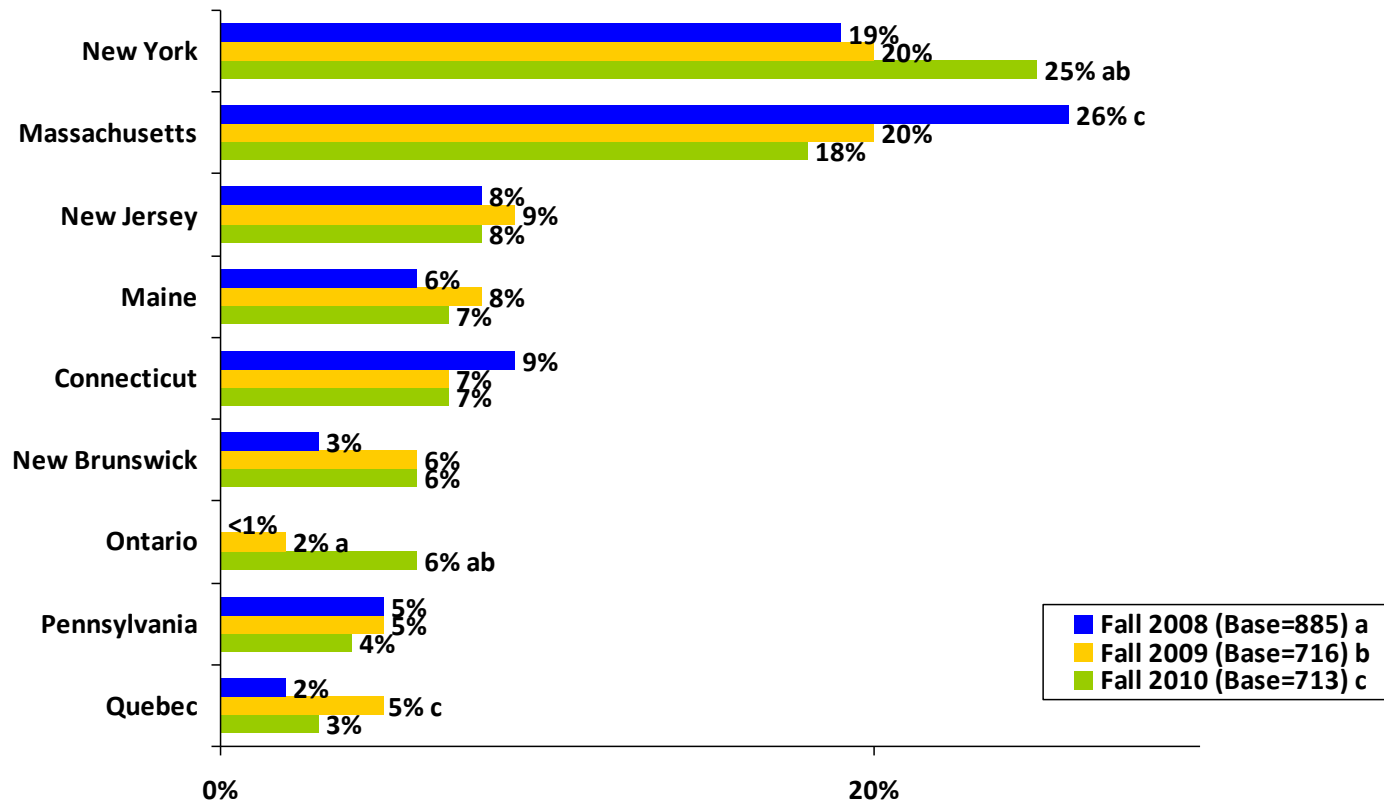
Demographics

- Overall, the demographic profile of both overnight and day visitors is consistent with what was seen in Fall 2009.

	Overnight Visitors			Day Visitors		
	Fall 2008 (Base=885) a	Fall 2009 (Base=716) b	Fall 2010 (Base=713) c	Fall 2008 (Base=533) d	Fall 2009 (Base=575) e	Fall 2010 (Base=524) f
Age						
< 35	40% c	33%	31%	37% ef	28%	26%
35 – 44	16%	17%	20%	16%	17%	17%
45 – 54	15%	18%	20%	16%	19%	23% d
55 +	29%	32%	29%	31%	36%	34%
Mean	41.86	44.89 a	44.17 a	42.88	46.98 d	46.55 d
Income						
< \$50,000	16% c	15% c	11%	28% c	23%	21%
\$50,000 - \$99,000	30%	35% a	39% a	49% ef	42%	40%
\$100,000 +	35%	35%	35%	24%	34% d	38% d
Mean	\$102,770	\$100,260	\$105,770	\$80,820	\$92,120 d	\$95,870 d
Female	47% b	37%	42%	47%	47%	49%
College Degree or Higher	74%	78%	78%	68%	77% d	76% d
Married	51%	60% a	57%	50%	61% d	63% d
Employed Full Time	59%	66% a	65%	56%	62% d	64% d

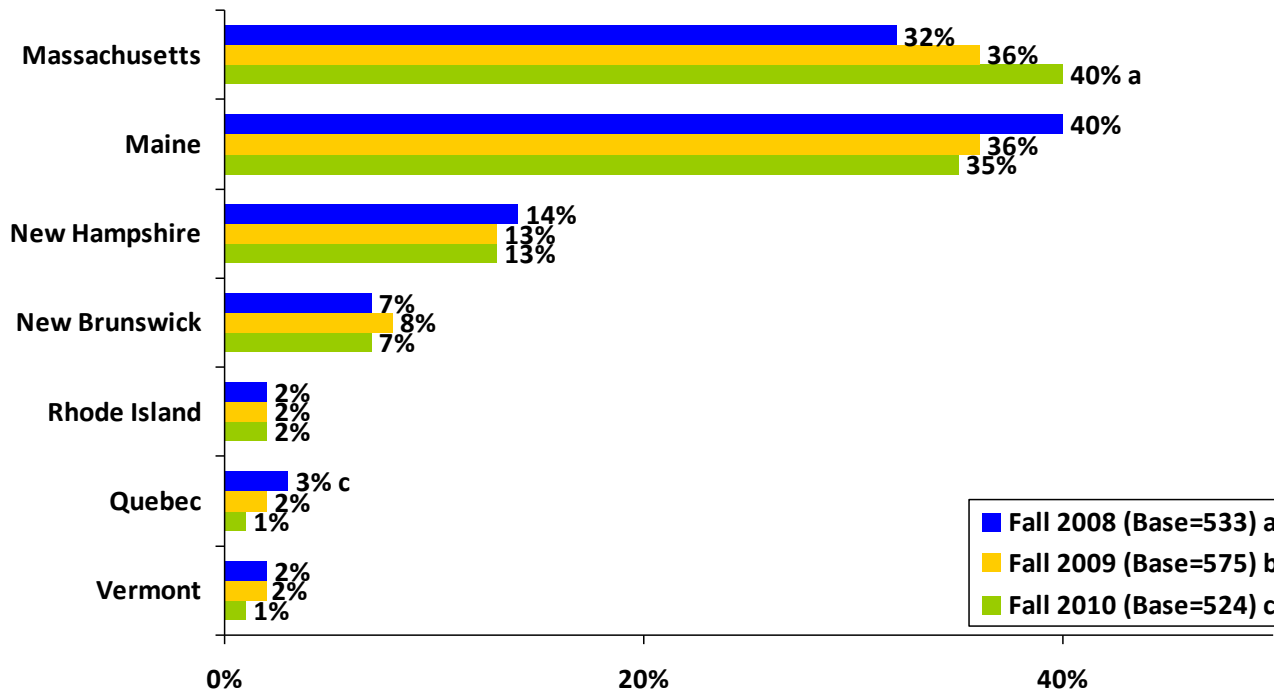
Residence of Maine Overnight Visitors

- There was a significant year-over-year increase in the percentage of overnight visitors to Maine from New York in fall 2010. Ontario visitors also show an increase over past years.



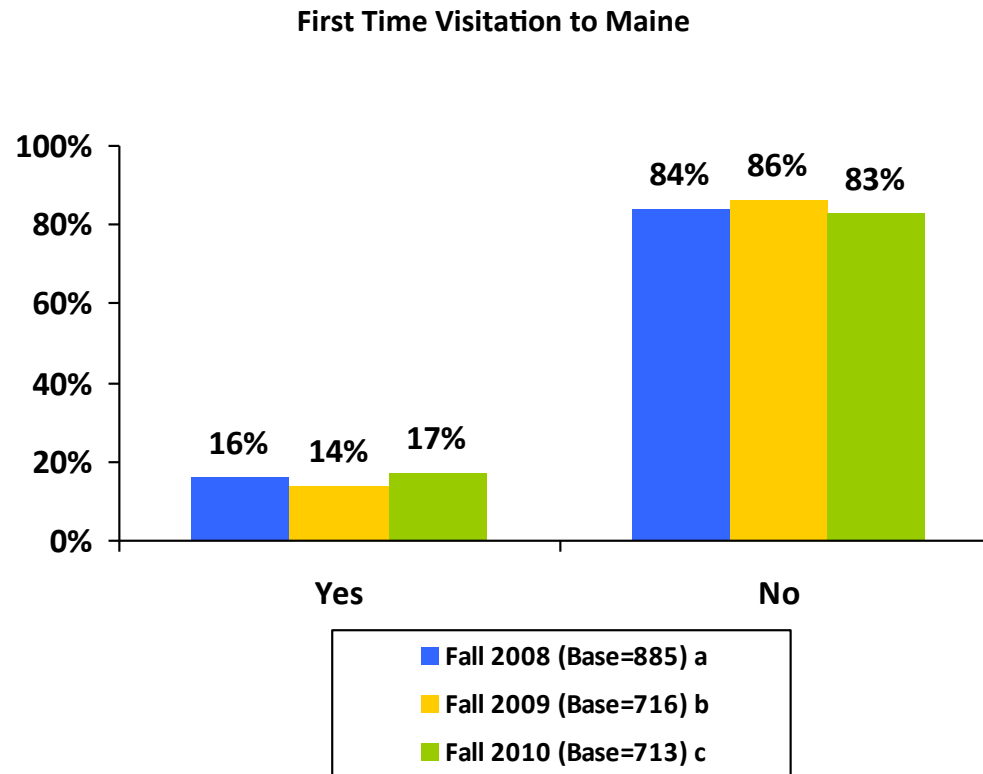
Residence of Maine Day Visitors

- There was a significant increase in the proportion of day visitors from Massachusetts during the fall of 2010 as compared to the fall of 2009.
- Visitation from all other locations is consistent with prior years.



Repeat versus First Time Overnight Visitors

- The percentage of overnight visitors to Maine who reported that they were first-time visitors to the state remained statistically stable with fall 2008 and 2009.

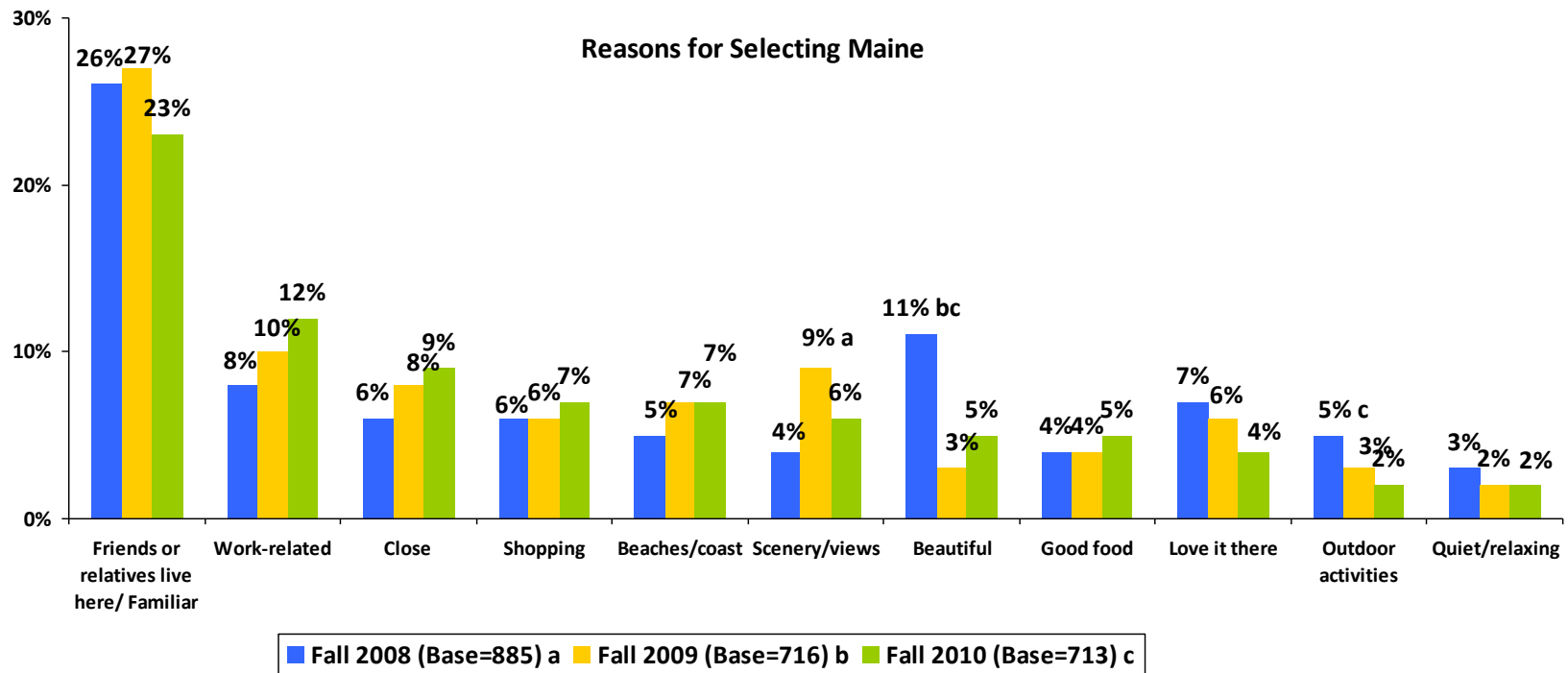


Trip Profile



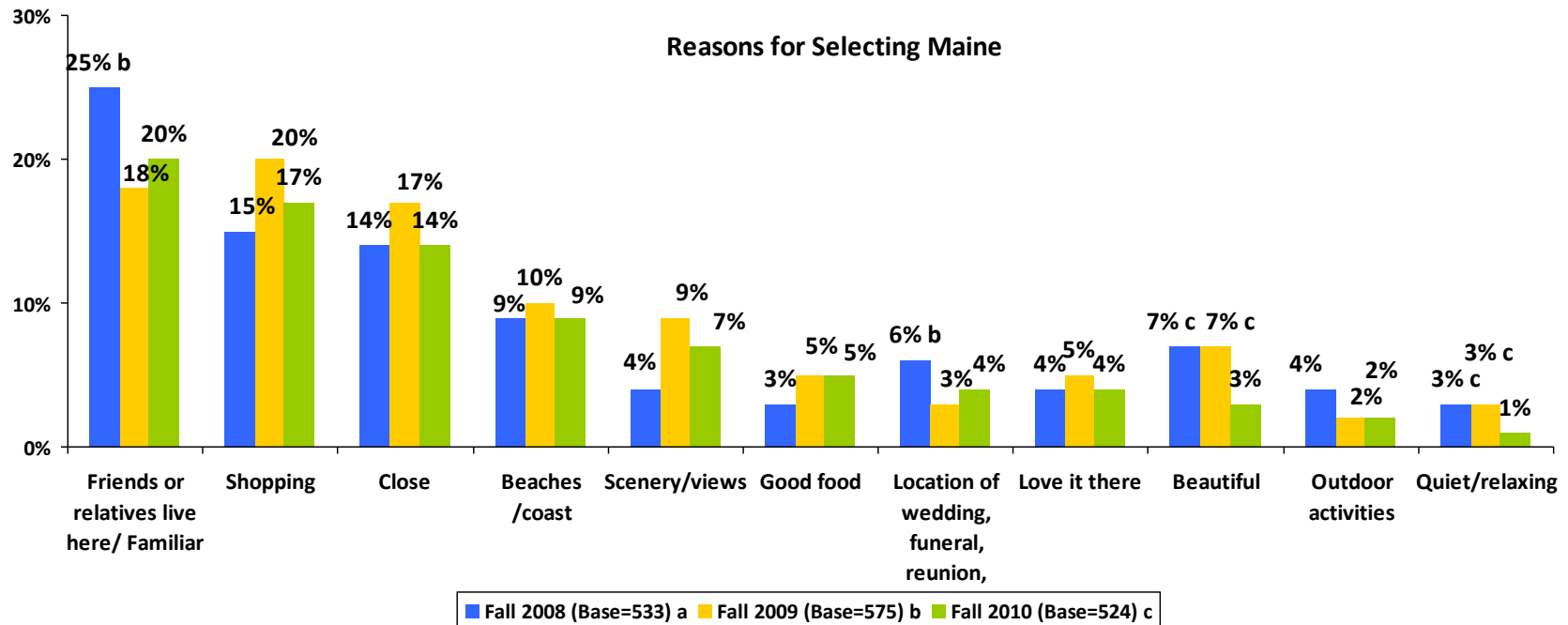
Reasons for Selecting Maine – Overnight Visitors

- There were relatively few significant year-over-year changes in the reasons why overnight visitors selected Maine for their trip in fall 2010, with familiarity with the region a top reason for visitation.



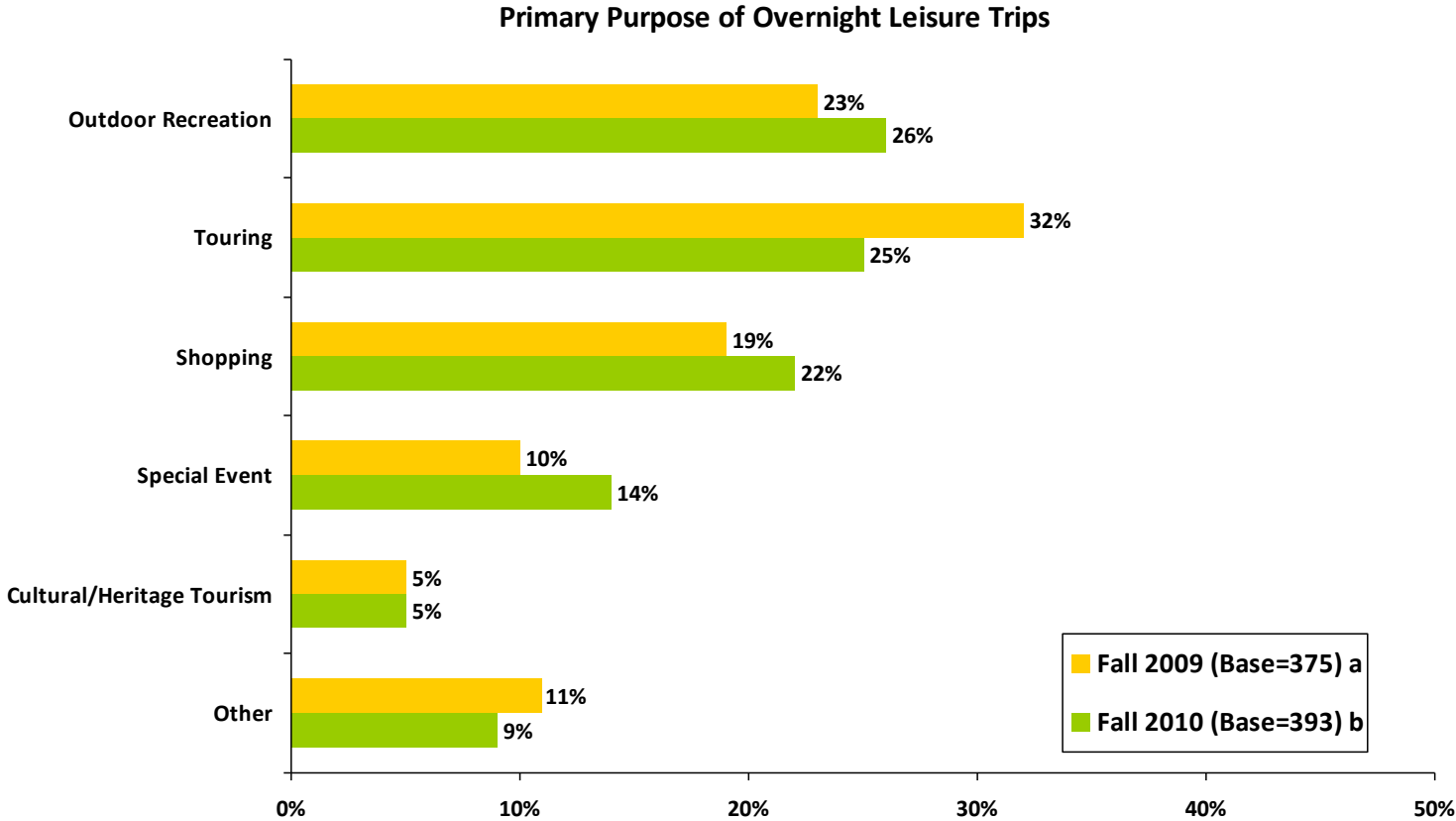
Reasons for Selecting Maine – Day Visitors

- Familiarity, shopping and proximity are three main reasons that day visitors choose Maine over other potential destinations.



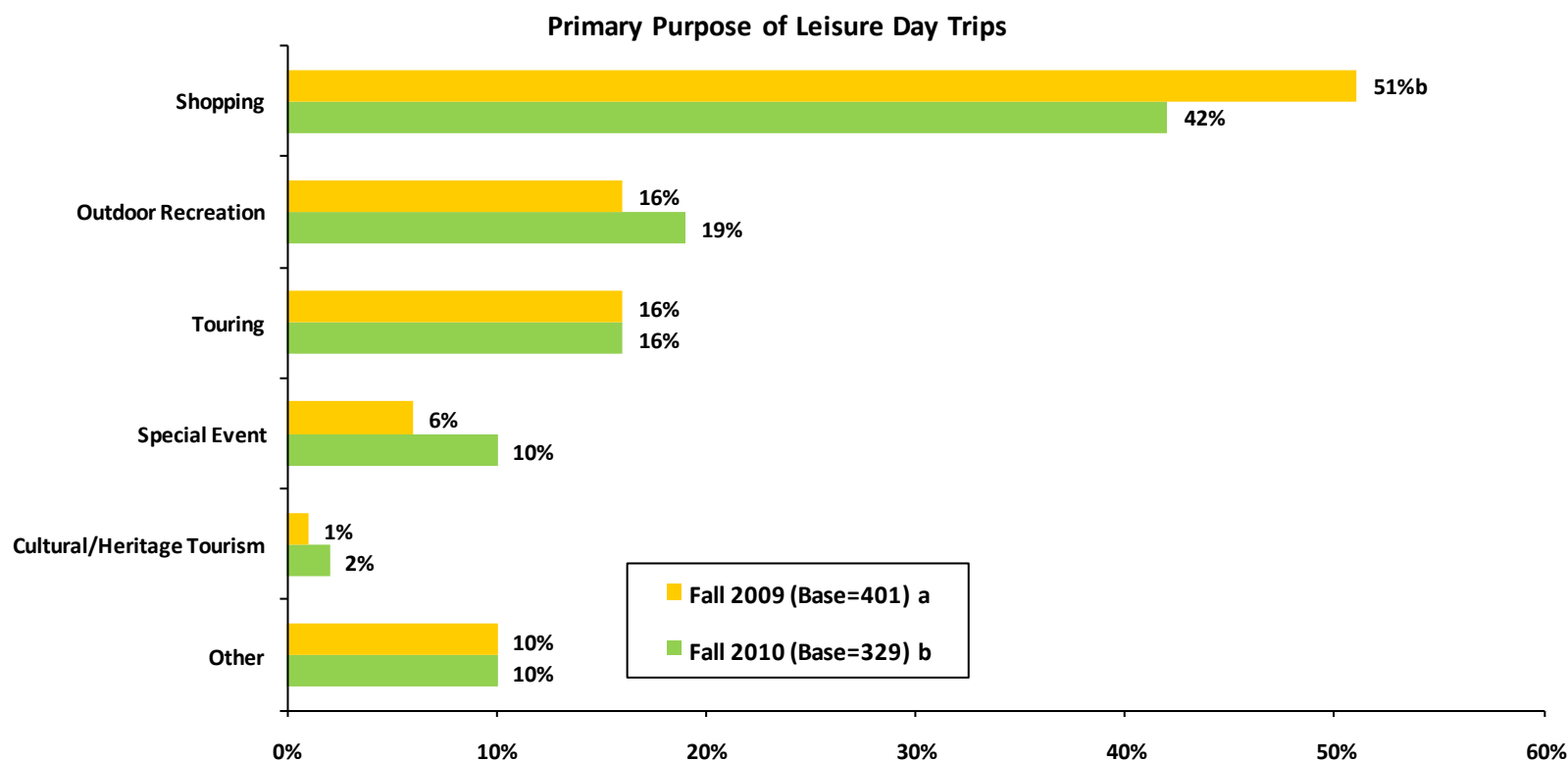
Primary Purpose of Overnight Leisure Trips

- *Outdoor recreation, touring, and shopping* continue to be the most popular reasons that overnight visitors choose to visit Maine.



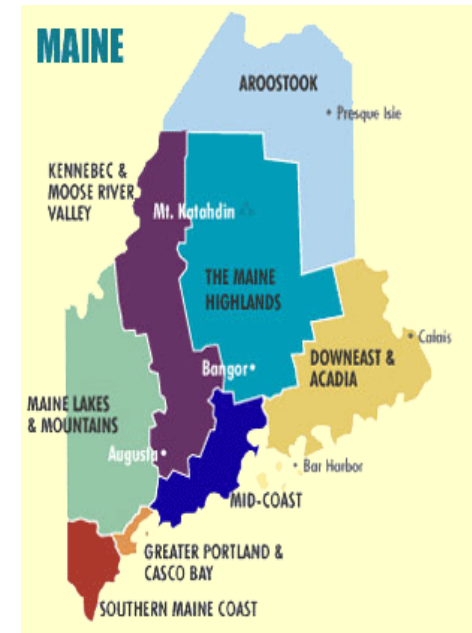
Primary Purpose of Leisure Day Trips

- There was a significant decrease in *shopping* as a primary purpose for fall 2010 visitors compared to fall 2009 as visitors showed a greater likelihood to travel with the primary purpose of attending a *special event*.



Regions Visited within Maine

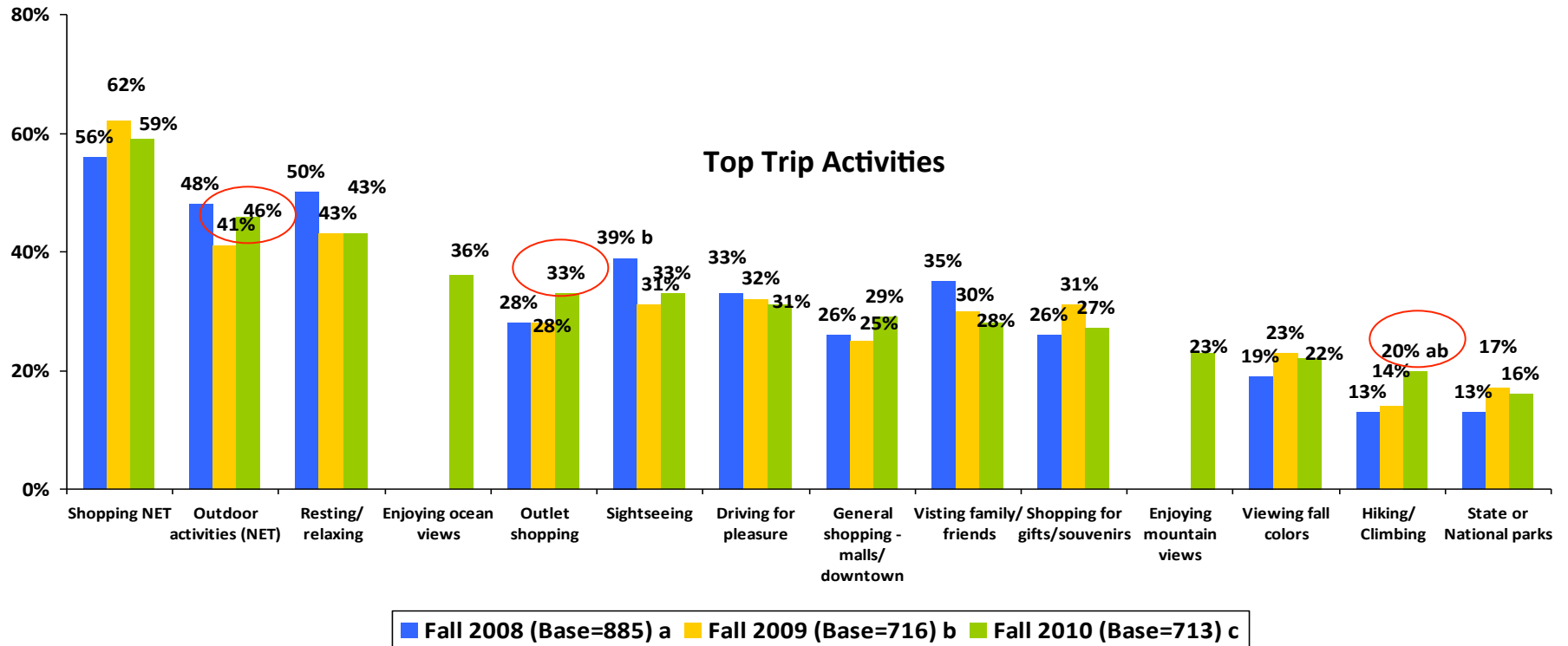
- Heavily populated regions in the southern part of the state were the most widely visited regions in Maine for both overnight and day visitation in the fall of 2010. It's notable to mention that there was a significant increase in the percent of overnight visitors who reported visiting the *Maine Lakes & Mountains* in the fall of 2010 over the prior year.



	Overnight Visitors			Day Visitors		
	Fall 2008 (n=885) a %	Fall 2009 (n=716) b %	Fall 2010 (N=713) c %	Fall 2008 (n=533) d %	Fall 2009 (n=575) e %	Fall 2010 (N=524) f %
Southern Maine Beaches	25%	23%	19%	29%	36% d	35%
Portland/Casco Bay	15%	16%	20%	19%	16%	14%
Maine Lakes and Mountains	10%	6%	11% b	13%	9%	9%
Mid-Coast	12%	13%	13%	12%	12%	13%
Kennebec & Moose River Valley	8%	9%	6%	8%	6%	9%
The Maine Highlands	13%	12%	11%	7%	10%	7%
Downeast & Acadia	12%	16%	16%	7%	7%	8%
Aroostook	3%	3%	2%	5%	3%	4%

Trip Activities – Overnight Visitors

- There was a significant year-over-year increase in the percent of overnight visitors who reported that they went *hiking/climbing* on their trip to Maine in fall 2010. There was also a directional increases in the percentage of visitors who reported that they participated in any outdoor activities or shopped at Maine’s outlets while on their trip.



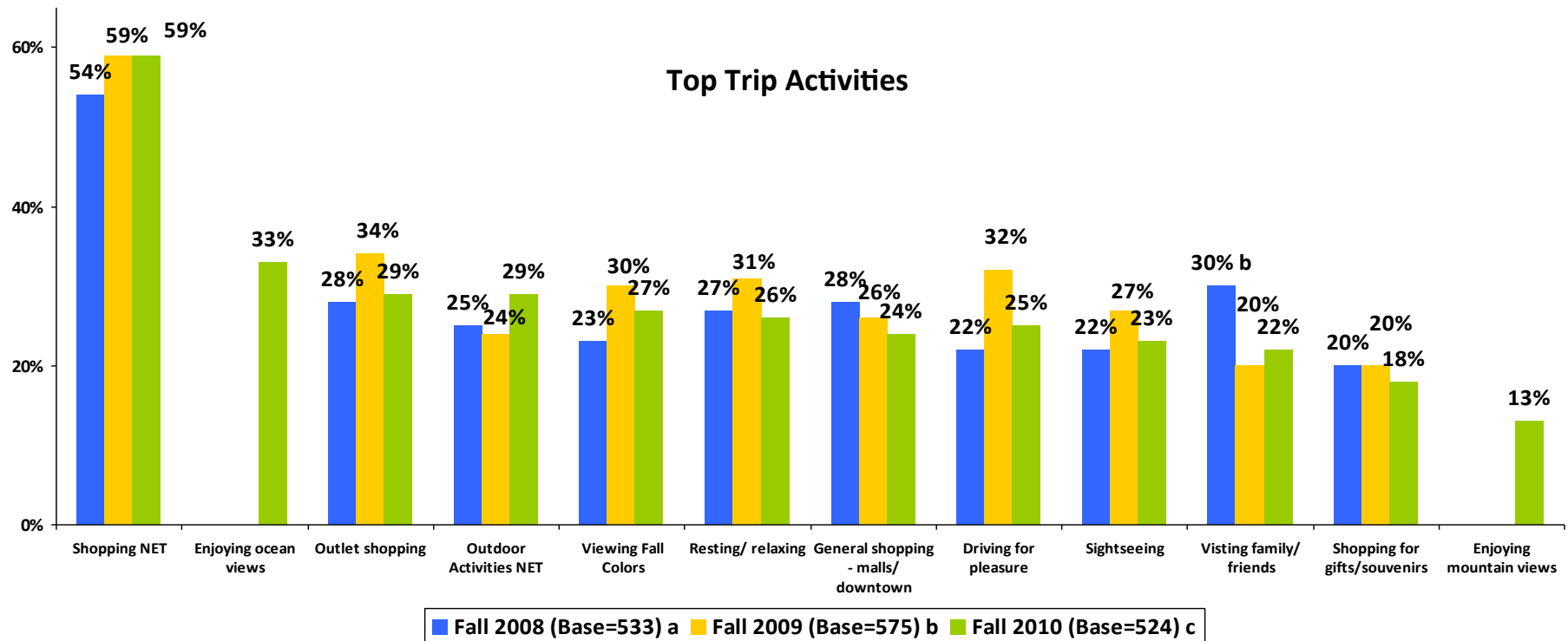
a,b,c indicates significant difference at the 95% confidence level

Regional Q32. In which of the following activities did you participate during this trip/your most recent trip in Maine? (Please check all that apply)

Note: Enjoying ocean/mountain views changed to two separate answers in summer of 2010

Trip Activities – Day Visitors

- While there were not any significant changes in reported highlights of visitors’ day trips to Maine during fall 2010, it is important to note that *outdoor activities* shows an upward trend over fall 2009.
- *Shopping* held steady as an activity that day visitors continue to consistently engage in.



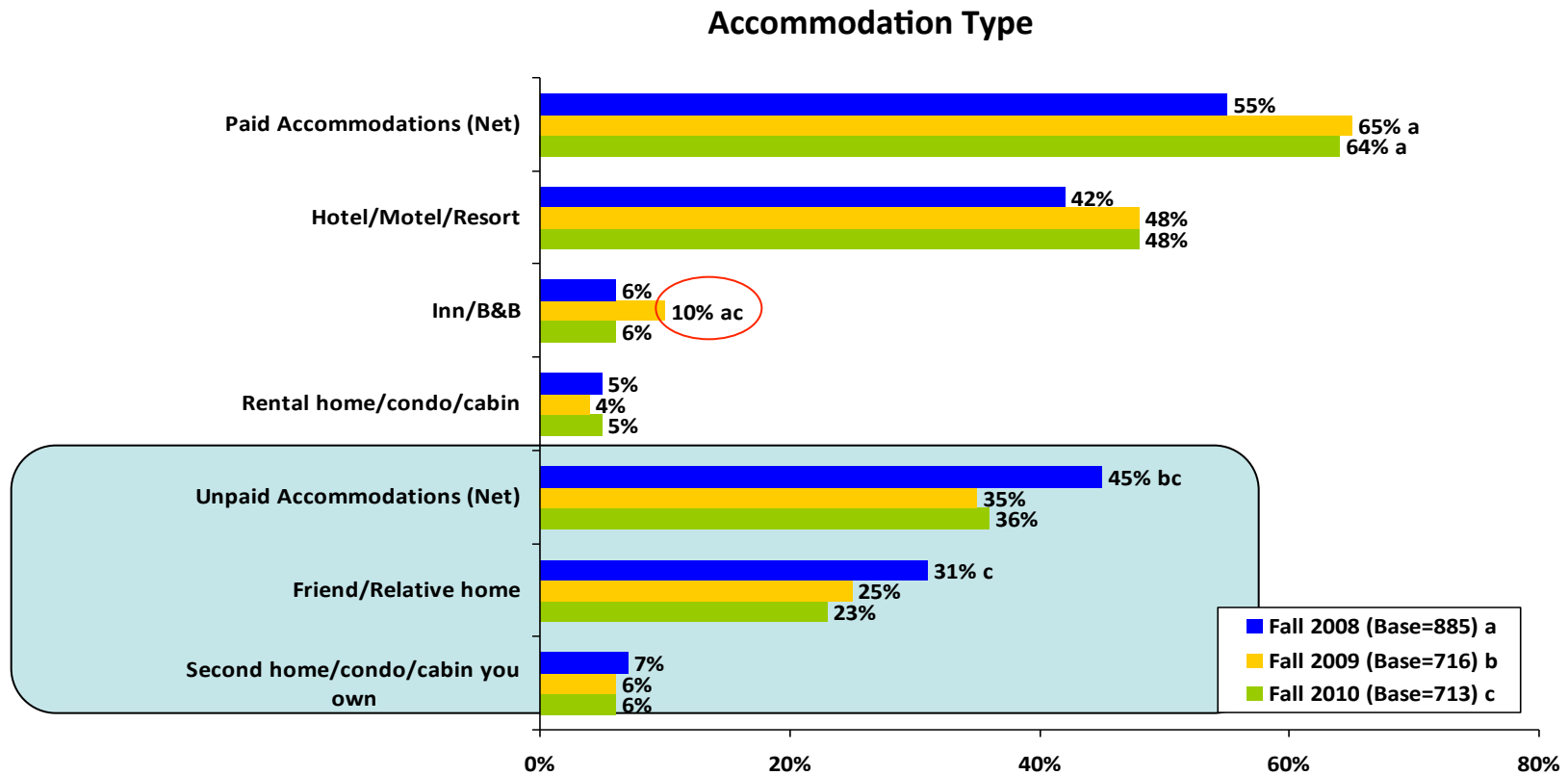
a,b,c indicates significant difference at the 95% confidence level

Day Q10. In which of the following activities did you participate during this trip/your most recent trip in Maine? (Please check all that apply).

Note: Enjoying ocean/mountain views changed to two separate answers in summer of 2010.

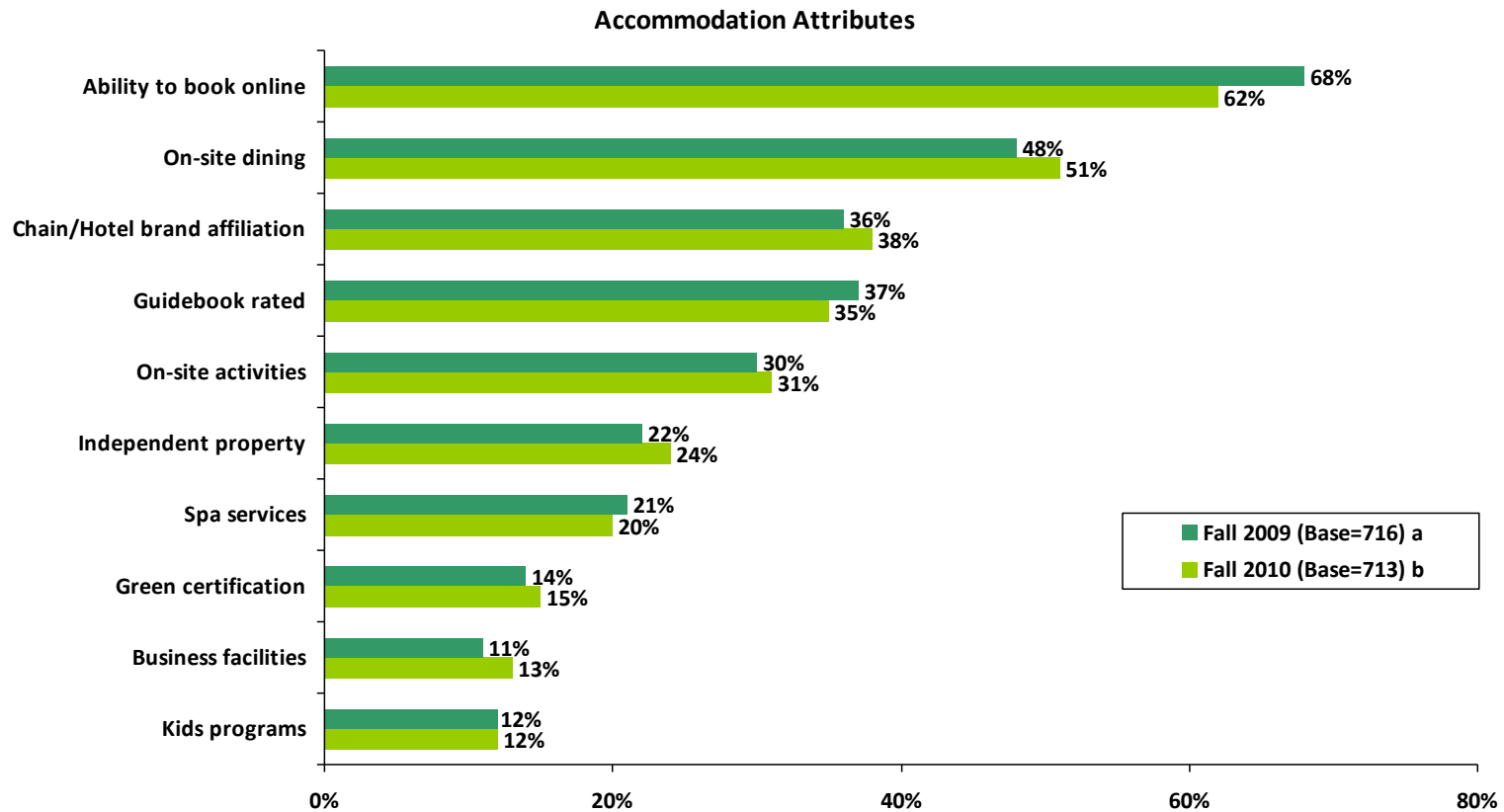
Accommodations in Maine

- Overall, the increase in the share of visitors staying in paid accommodations remained consistent with fall 2009, which is encouraging given the increase in visitation.
- However, fewer say they stayed at Inns or B&Bs.



Important Accommodation Attributes

- The *ability to book a room online* is an important attribute for Maine travelers. Secondly, visitors look for *on-site dining* in their lodging choices. Conversely, relatively few respondents report that they look for *green certification, business facilities, or kids programs*.



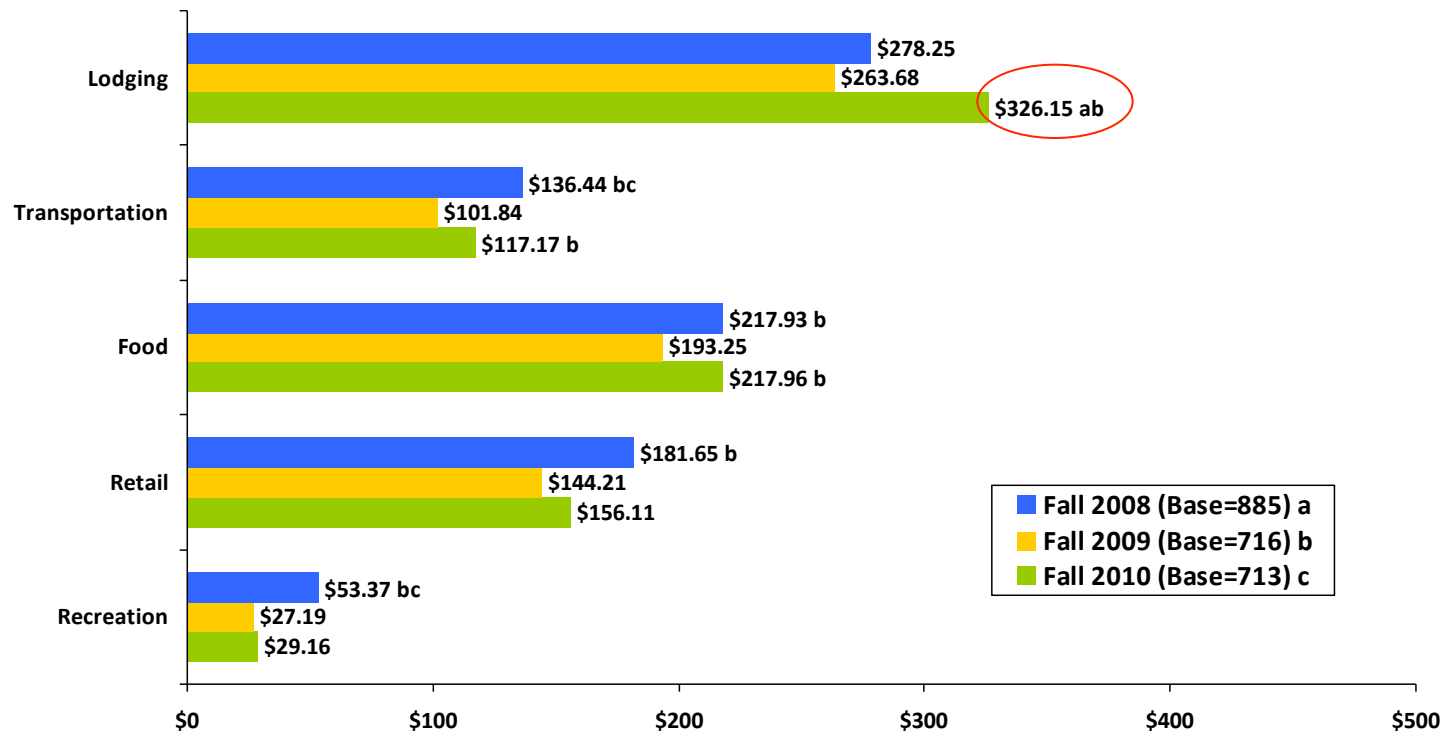
a,b indicates significant difference at the 95% confidence level

Regional Q39a. Assuming equal prices for a property - please pick the three most important attributes you would look for in a lodging on a future visit to Maine:

Note: Q39a in 2010

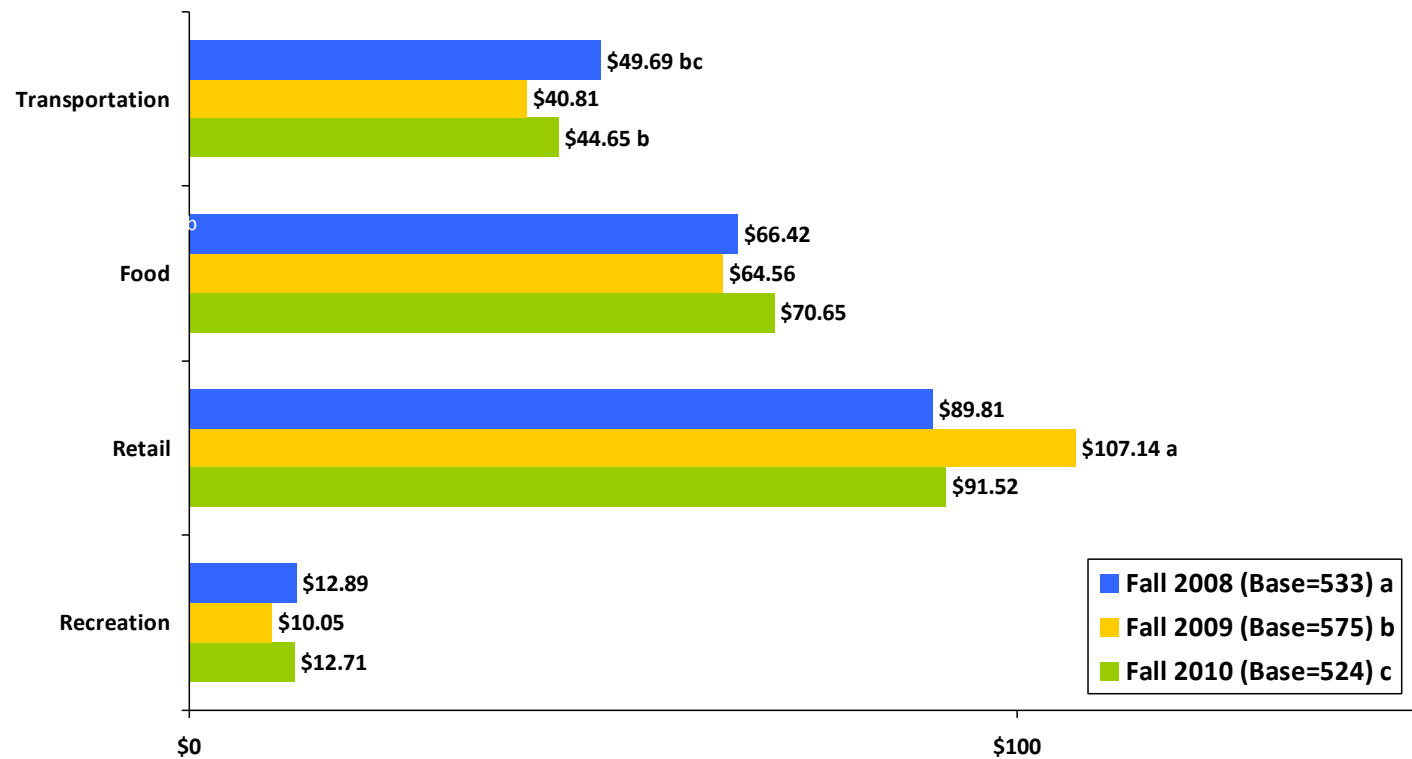
Overnight Trip Spending

- Lodging spending per trip shows a significant increase over prior years, as visitors continue to choose paid accommodations for their trips to Maine, and are beginning to show a willingness to spend more money on their travel.
- Spending on transportation and food also show increases over fall of 2009, while retail and recreation spending maintain levels of spending from the prior year.



Day Trip Spending

- Day spending levels are consistent with levels seen in fall of 2009, although there is a directional decrease in retail spending from the level seen last year.

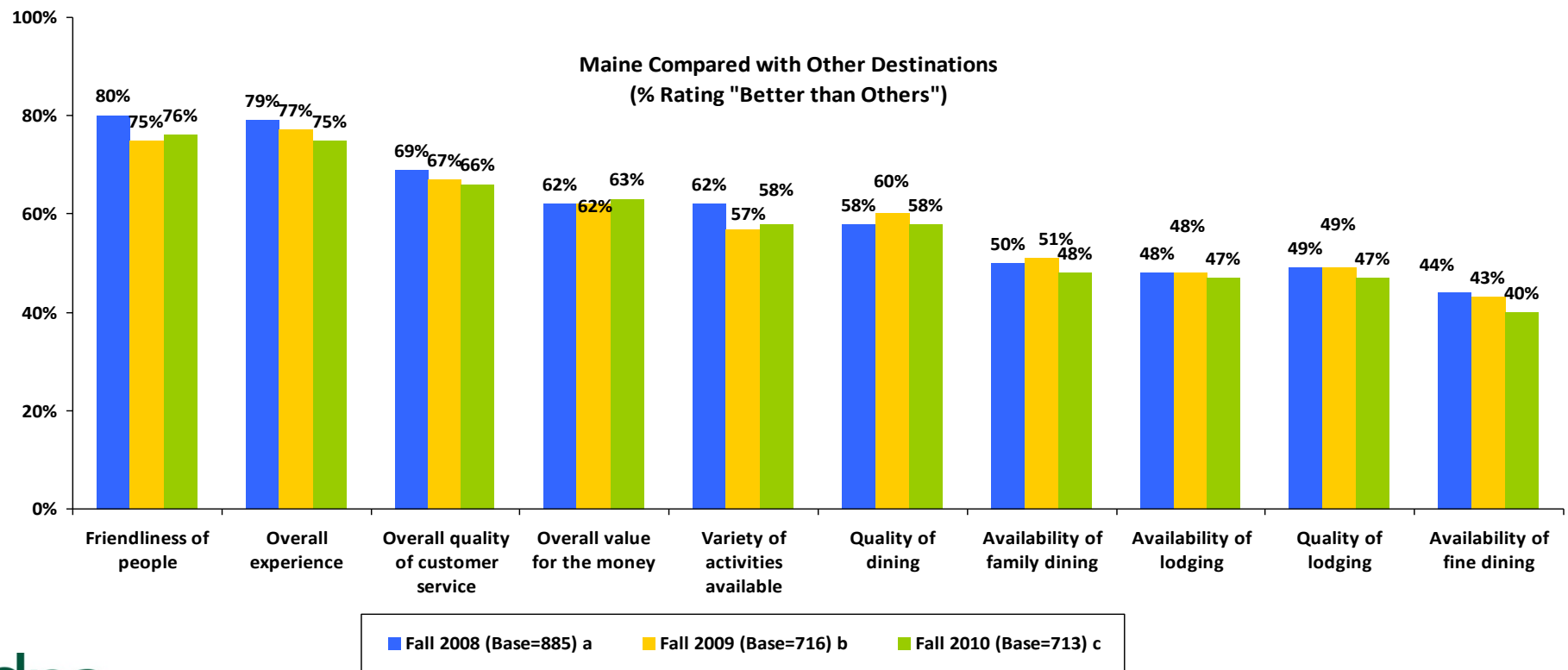


Trip Evaluation



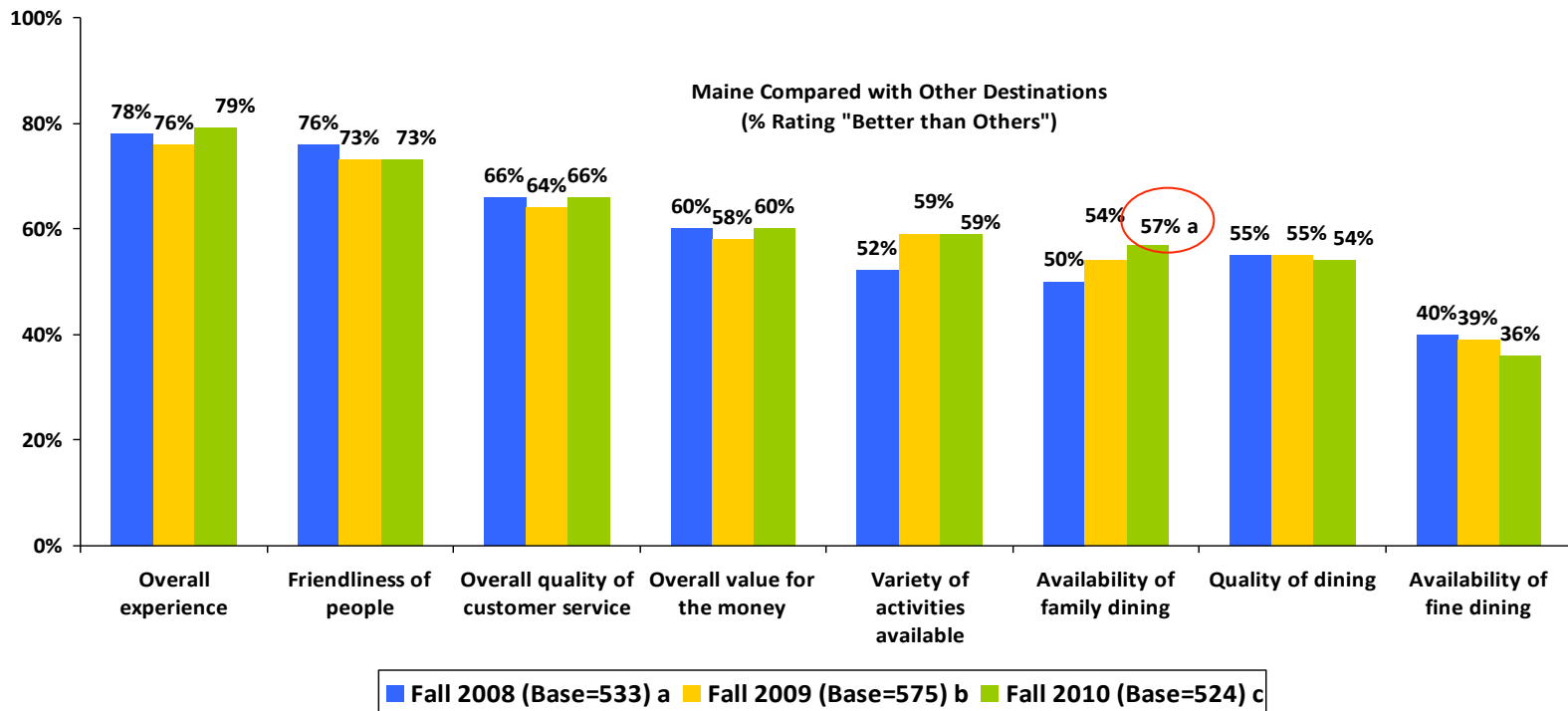
Evaluation of Maine Compared to Other Destinations – Overnight Visitors

- Perceptions of Maine relative to other destinations remained statistically stable between fall 2009 and fall 2010. The two attributes where Maine overnight visitors are most likely to rate the state as better than other destinations include the friendliness of the people and the overall experience.



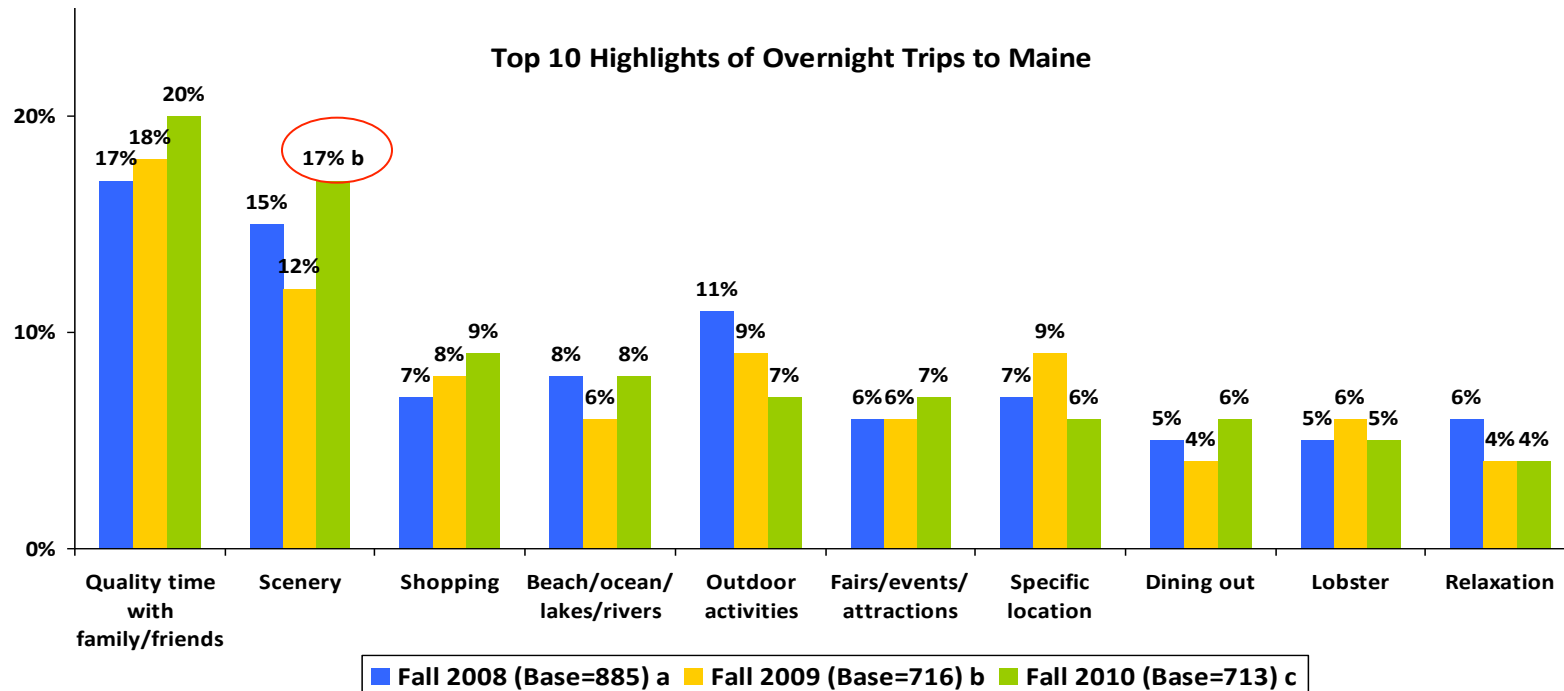
Evaluation of Maine Compared to Other Destinations – Day Visitors

- In a similar pattern to what is seen with overnight visitors, ratings of Maine compared to other destinations also remained stable among day visitors to the state.
- Maine scores particularly well against other destinations in *overall experience* and *friendliness of the people*. We are also seeing an increased trend in how Maine is viewed for its availability of family dining.



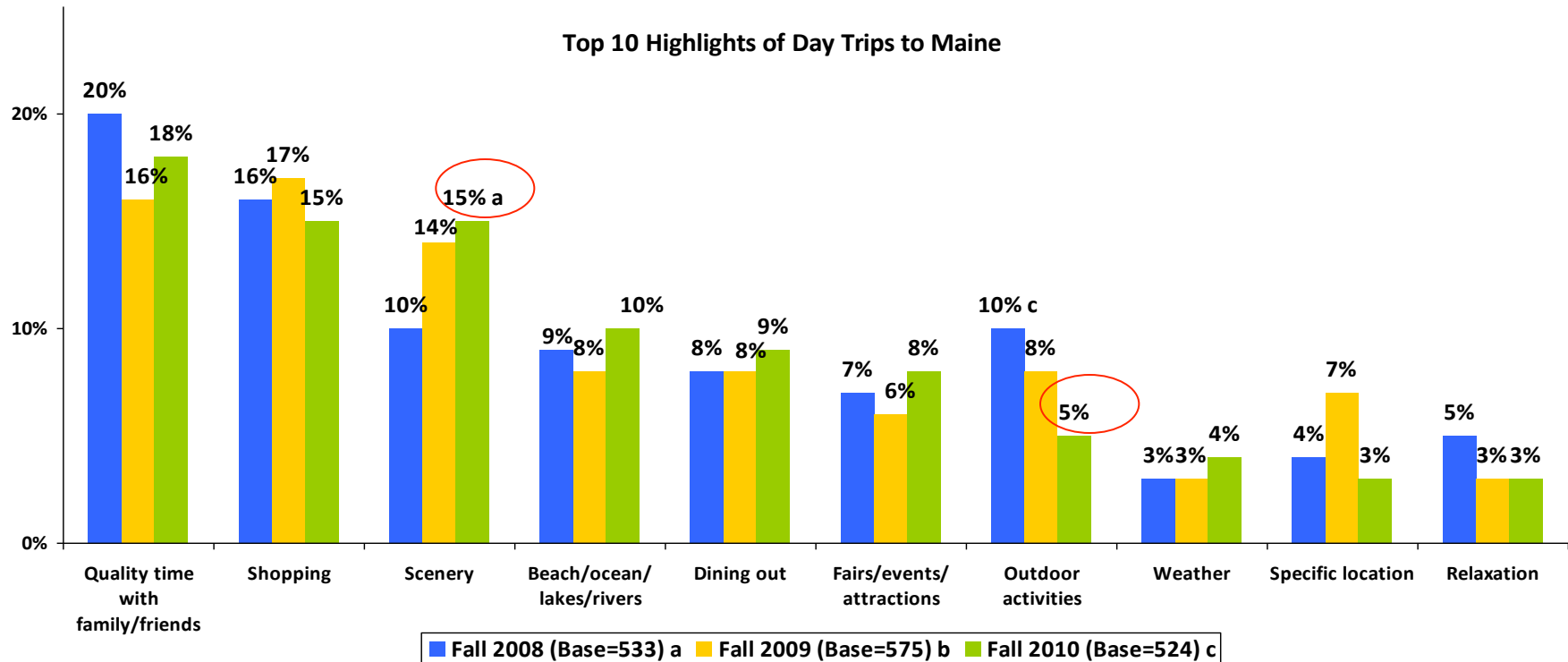
Highlight of Overnight Trip to Maine

- While *quality time with family/friends* continues to be the most frequently cited highlight of overnight travelers trips to Maine, there was an increase in visitors who pointed out the scenery as a highlight.



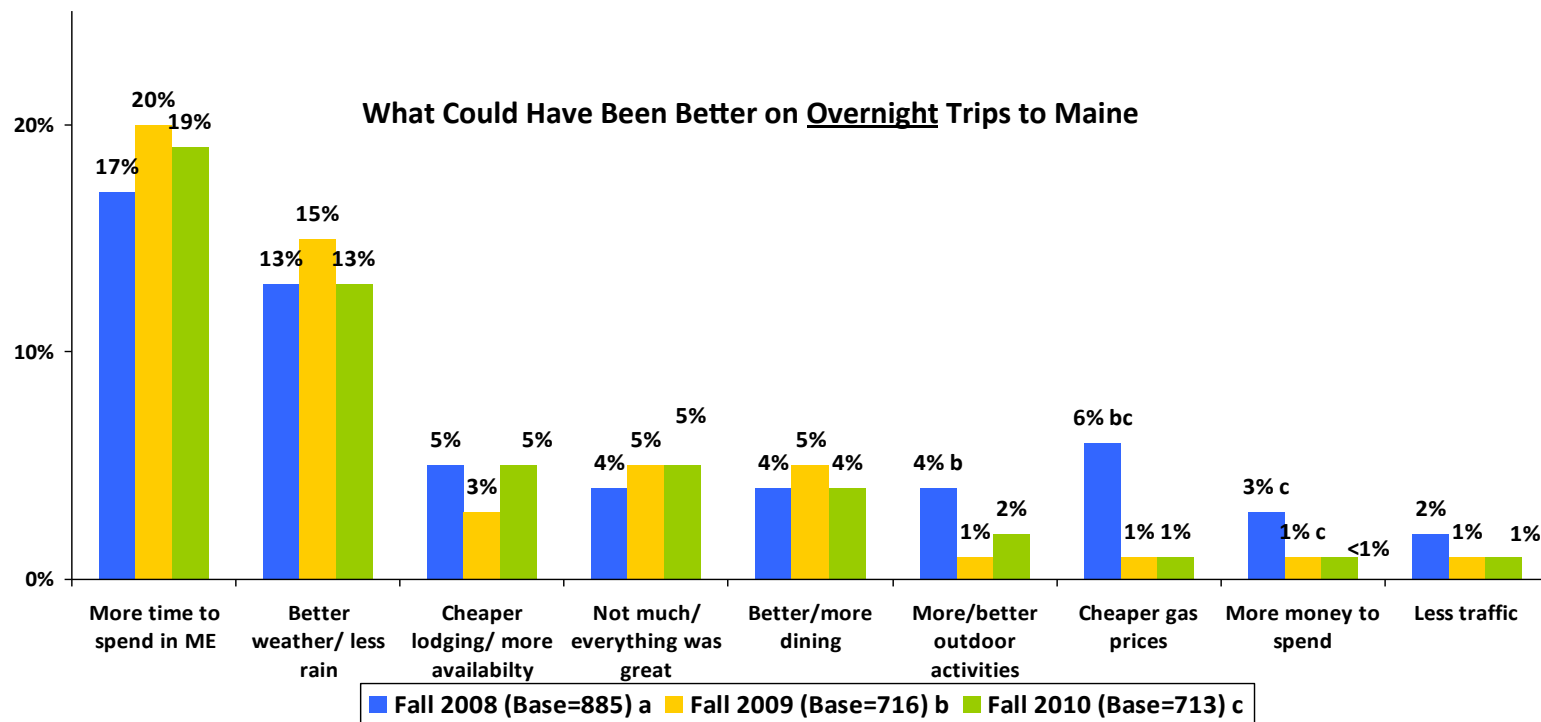
Highlight of Day Trip to Maine

- As was the case with overnight visitors, the most frequently cited highlight is a personal one, spending *quality time with family/friends*.
- Secondly, *shopping* and *scenery* are frequently cited highlights of day trips to Maine.
- While we see more day visitors in fall 2010 point out the scenery as a highlight of their day trip, fewer report outdoor activities as being a highlight.



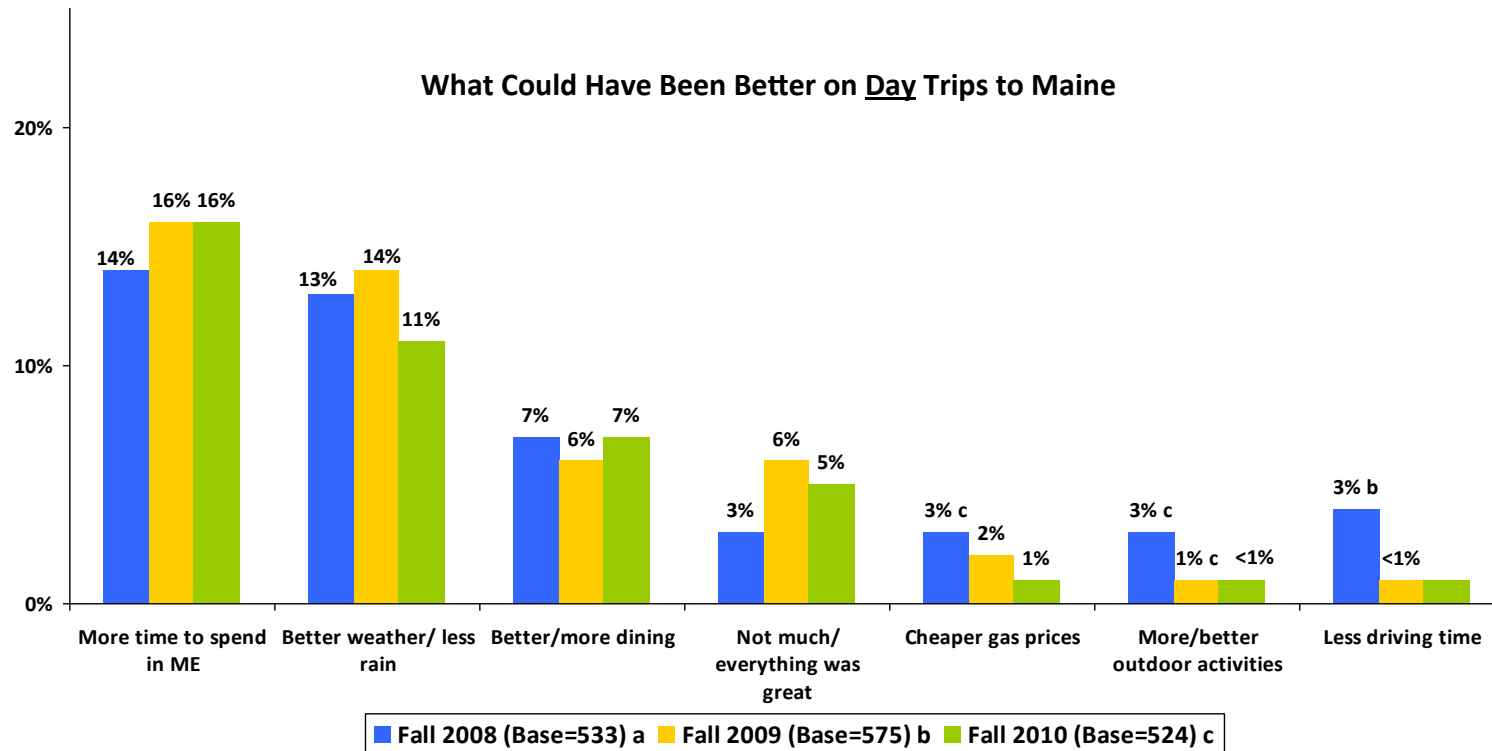
Aspects of Overnight Trips that Could Have Been Better

- On a positive note, the most commonly cited item that could be improved on an overnight trip to Maine would be to have more time to spend.
- The next most frequently selected item up for improvement is one that is difficult to control, but some visitors, likely those who came during some of October's rain, would have liked better weather.
- Despite increases in gas prices, we do not see an increase in complaints about this issue.



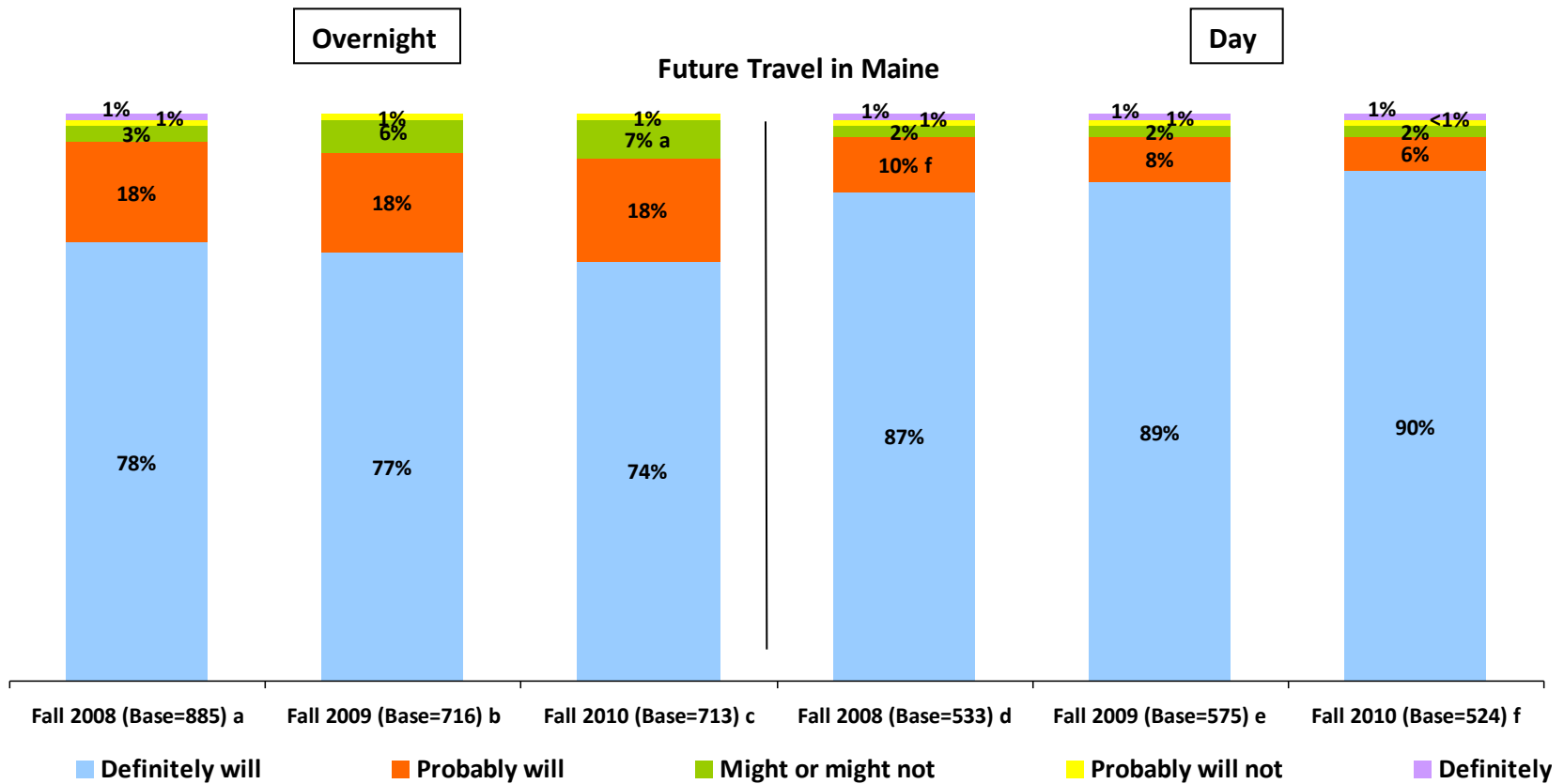
Aspects of Day Trips that Could Have Been Better

- As with overnight visitors, the most common aspects of the trip visitors would like to see improved are being able to spend more time, and having better weather.



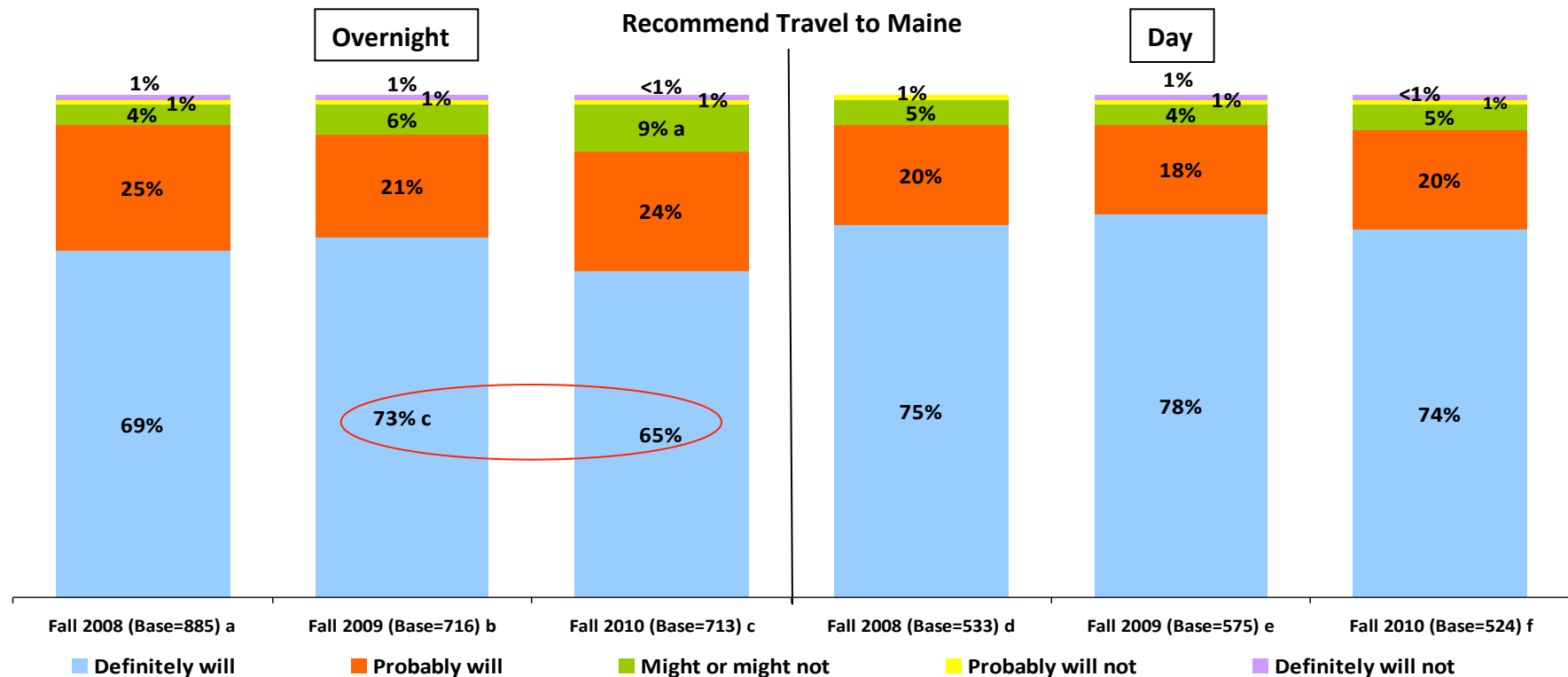
Future Travel in Maine

- Future Maine travel intentions remain strong among both overnight visitors and day visitors to the state. In fact, well more than nine-in-ten overnight and day visitors from fall 2010 report that they are likely to come back to Maine for a trip in the future.



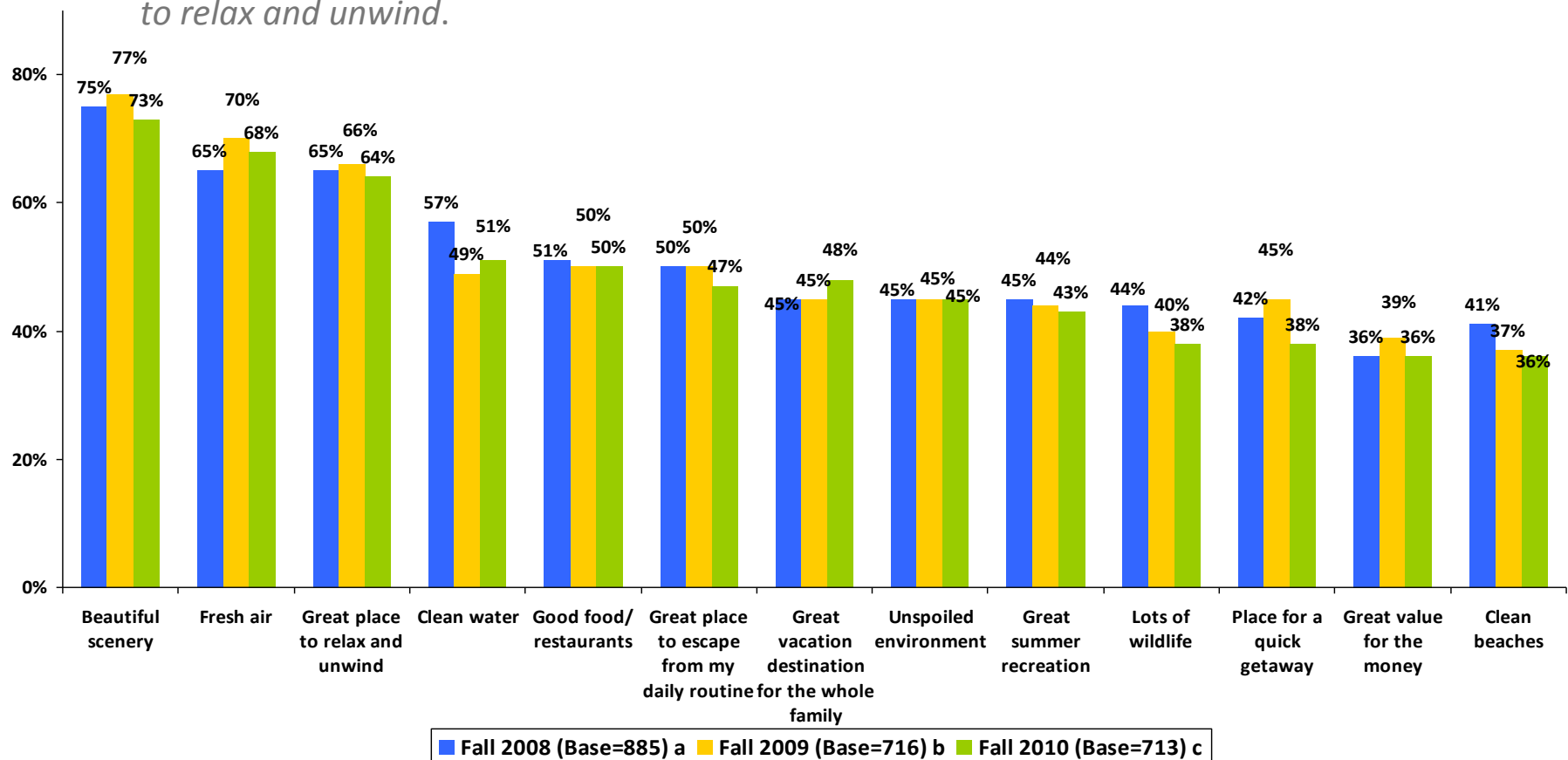
Recommendation of Maine as a Travel Destination

- Overnight visitors are somewhat less likely to ‘definitely’ recommend Maine in 2010 as they were in 2009 although nine out of ten would still recommend Maine as a travel/vacation destination. Similarly, likelihood to recommend Maine as a travel destination remains strong among day visitors.



Descriptions of Maine – Overnight Visitors

- Overnight visitors’ descriptions of Maine remained consistent compared to fall 2009. The most widely used descriptions of Maine from the attributes below remain environmentally-focused and include the *beautiful scenery*, *fresh air*, and a *great place to relax and unwind*.

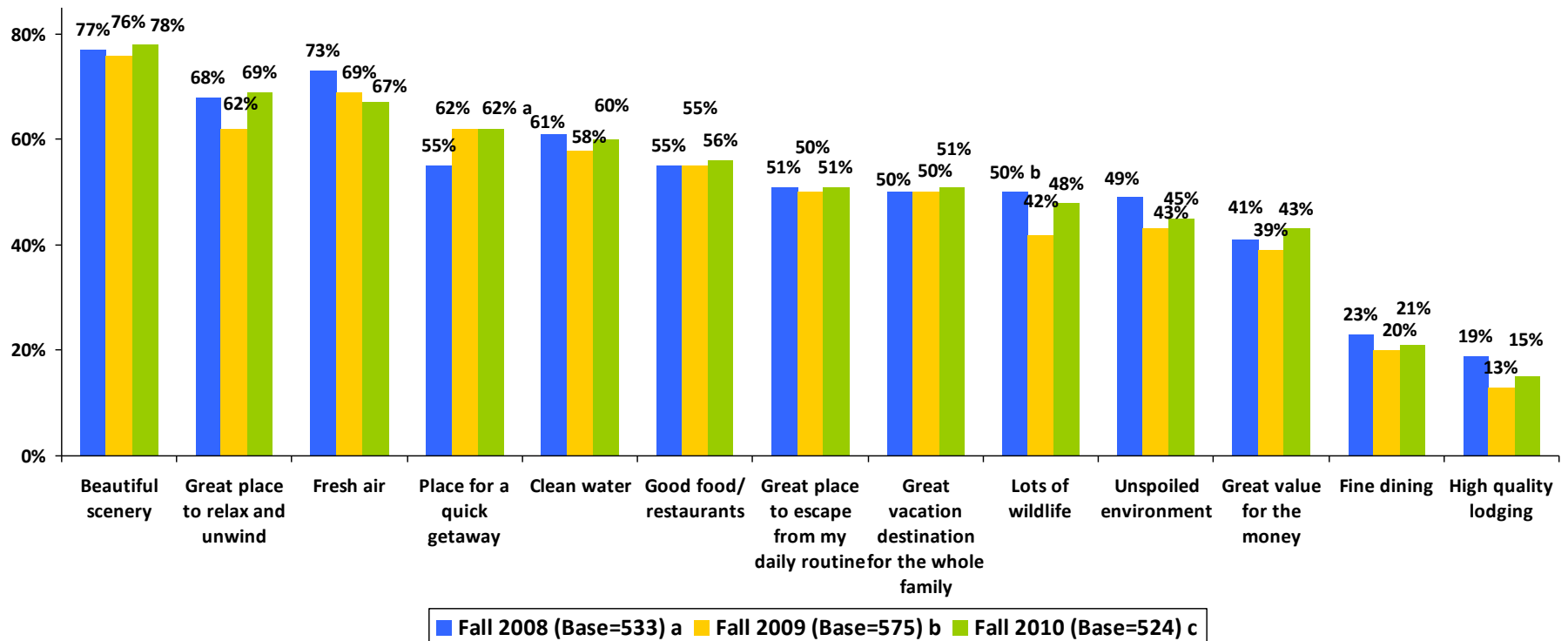


a,b,c notes significant difference at the 95% confidence level

Regional Q39. From the list below, please select the phrases that you feel best describe Maine as a vacation destination. (Please check as many or as few as apply)

Descriptions of Maine – Day Visitors

- *Beautiful scenery, great place to relax and unwind, and fresh air* were the most widely used descriptions of Maine by day visitors to the state in fall 2010.

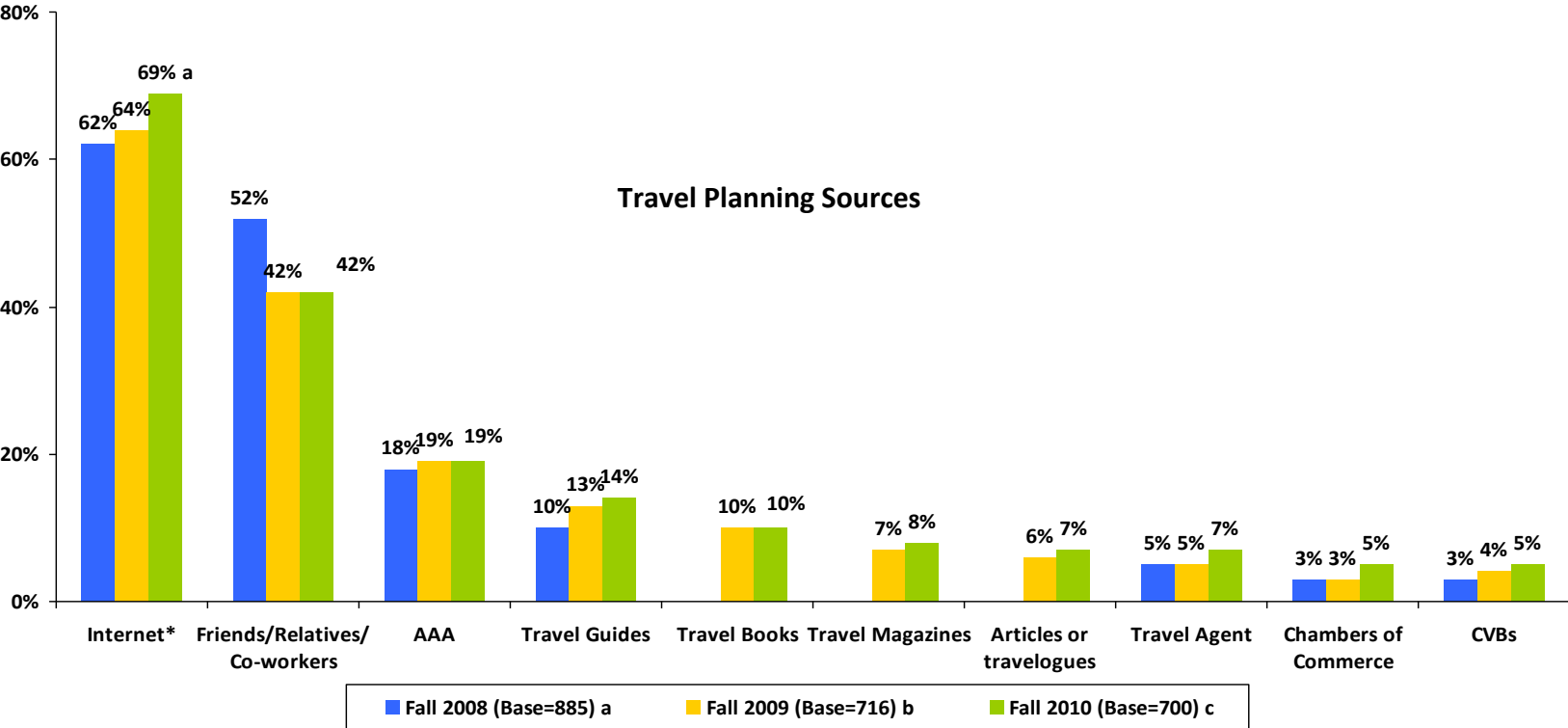


Maine Overnight Visitor Fall Trip Planning



Travel Planning Sources

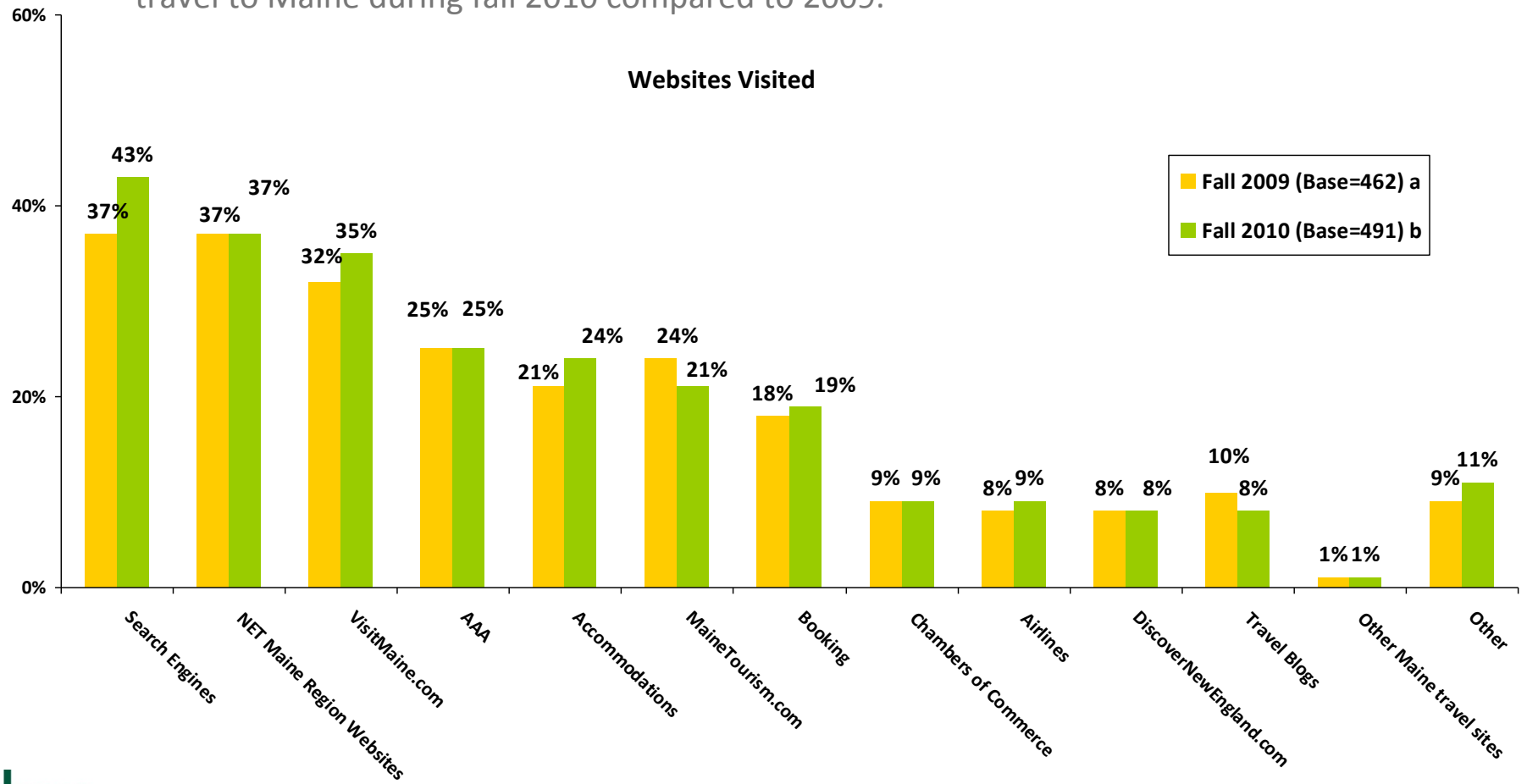
- The Internet continues to be the most widely used planning source for overnight visitors to Maine. Seven out of ten overnight visitors to Maine in fall 2010 reported using the Internet to plan their trip.



a,b,c indicates significant difference at the 95% confidence level
 Regional Q17. When you were planning this recent trip in Maine, which of the following sources did you use?
 *Note: data collection via online method.

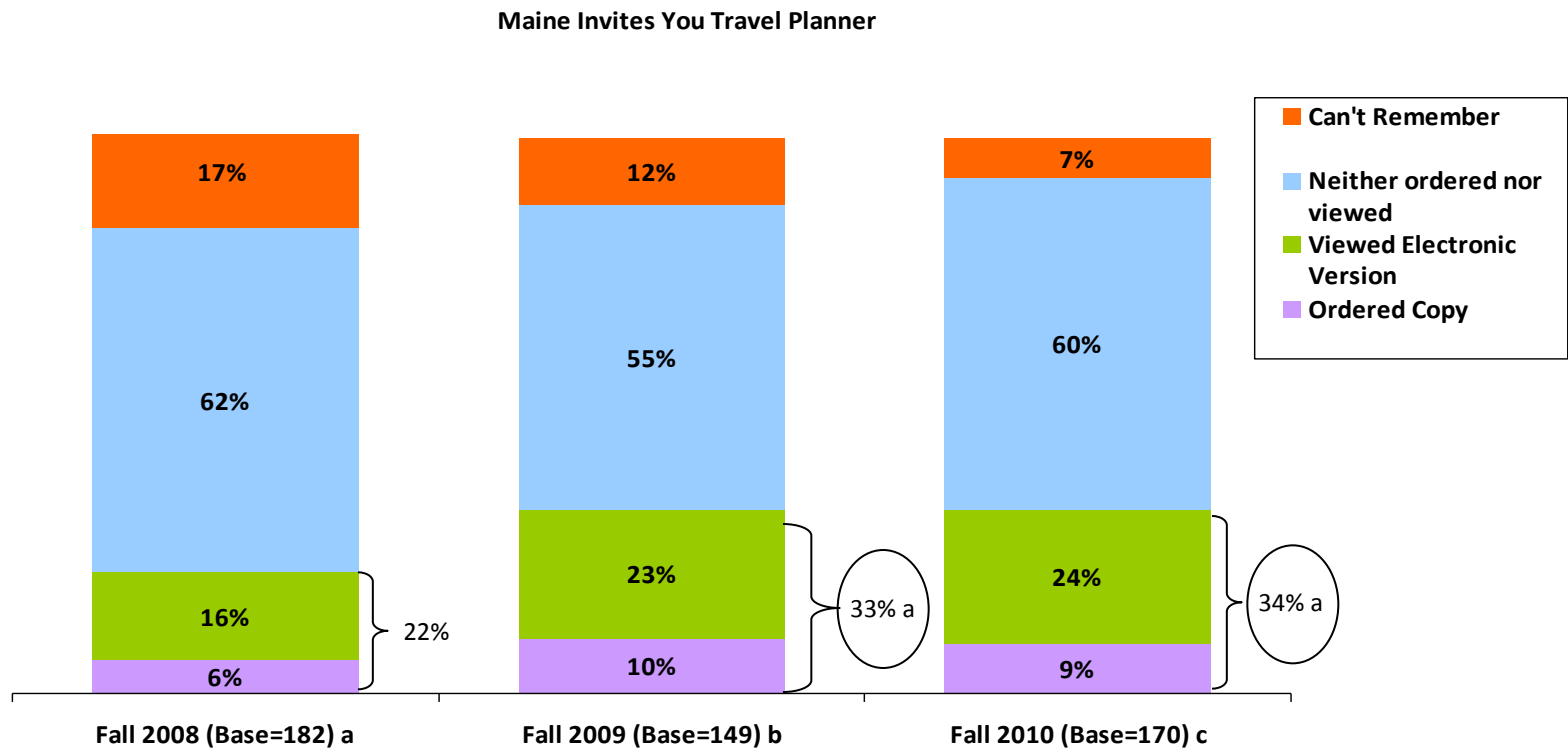
Online Travel Planning

- The percentage of overnight visitors to Maine who reported using a Maine Regions' Website to help plan their trip to Maine remained stable in 2010. Search Engines saw a resurgence in 2010, as did many other websites which is consistent with the increases in travel to Maine during fall 2010 compared to 2009.



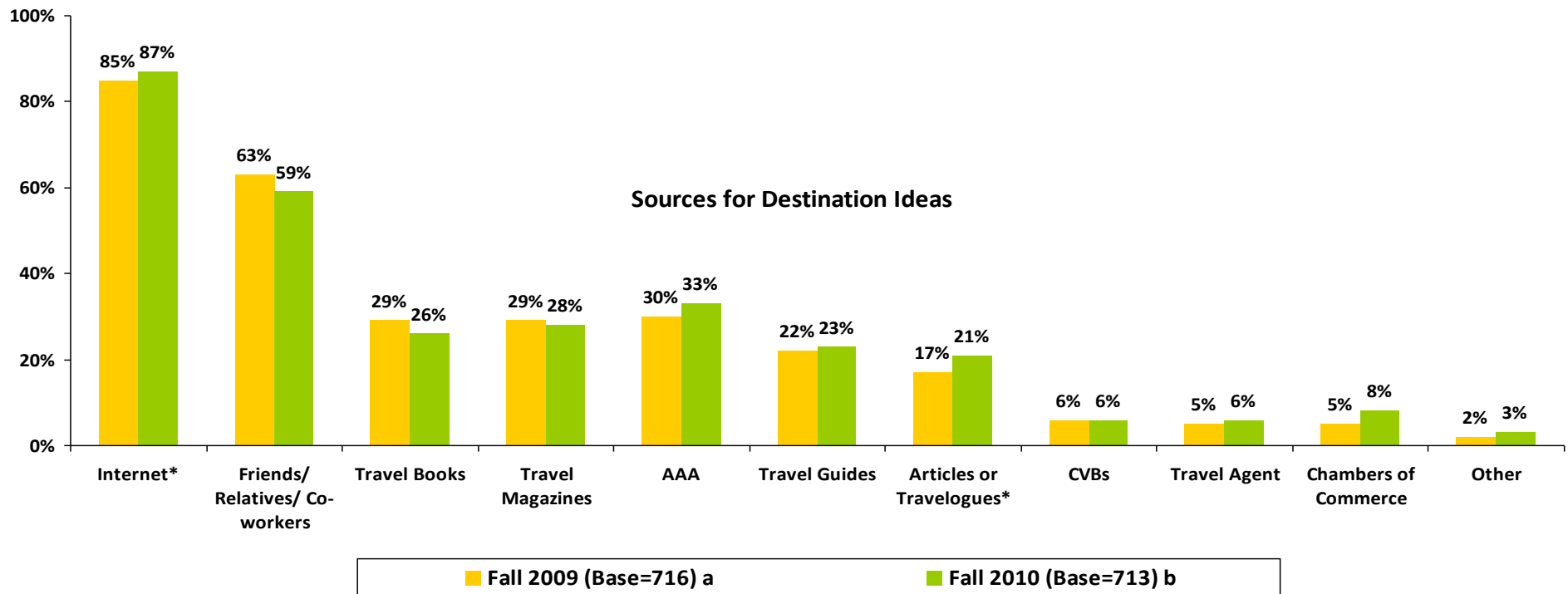
Maine Invites You Travel Planner

- The percentage of VisitMaine.com site visitors who either ordered or viewed the electronic version of Maine Invites You remained consistent with fall 2009 levels. These results are an indication of stable interest in the book among prospective visitors to Maine.



General Travel Planning Sources – Initial Ideas for Destinations

- In addition to being the two most widely-used sources for planning a trip to Maine, the Internet and word-of-mouth are also the top two sources that overnight visitors to Maine use when looking for initial destination ideas.
- These two travel planning sources create a top-tier of travel planning resources, while other sources such as travel books, magazines, guides, and AAA form a second-tier of travel information sources.



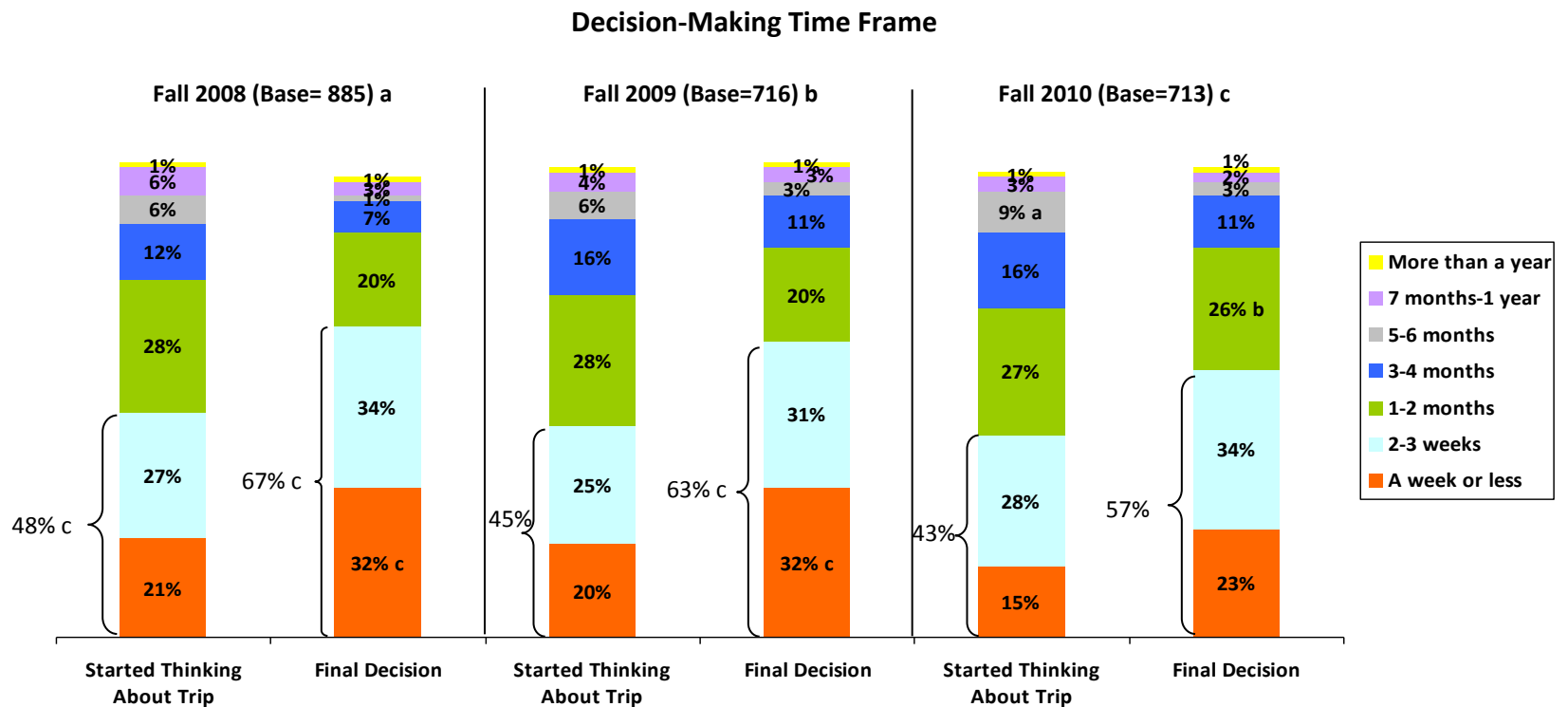
a,b,c notes significant difference at 95% confidence level.

Regional Q42. When you are planning a vacation or leisure trip, where do you typically get ideas for different places to visit? (Please check all that apply)

**Note: Online data collection method used*

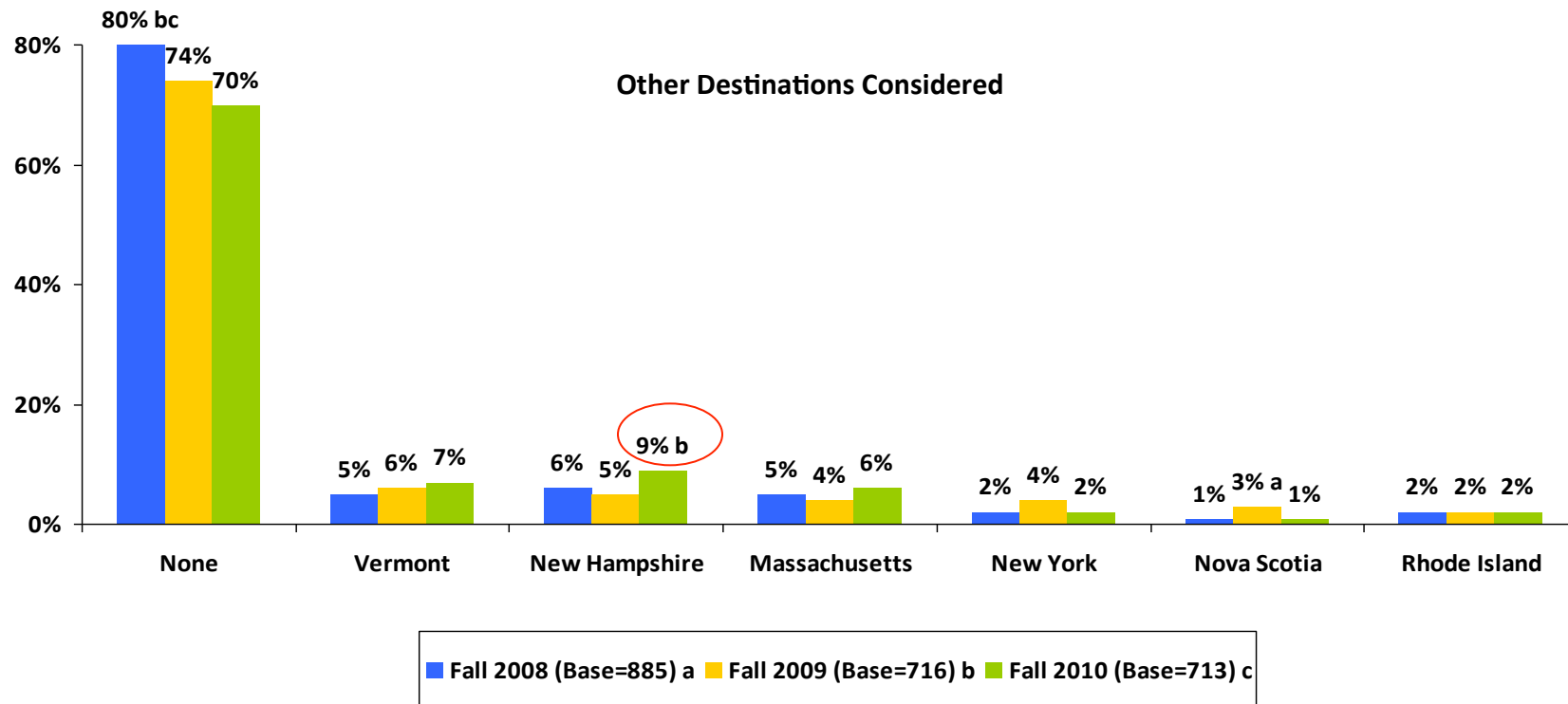
Planning Time Frame

- Travelers are beginning to make their final travel decisions a little bit more in advance than we have seen in the past couple of years.
- However, the time frame in which travelers are starting to think about their trip remains consistent over the previous 3 fall seasons.



Other Destinations Considered

- Almost three-quarters of overnight visitors to Maine during fall 2010 did not consider any destination aside from Maine as travelers.
- More overnight visitors considered New Hampshire for their fall trips in 2010 than in the fall of 2009.

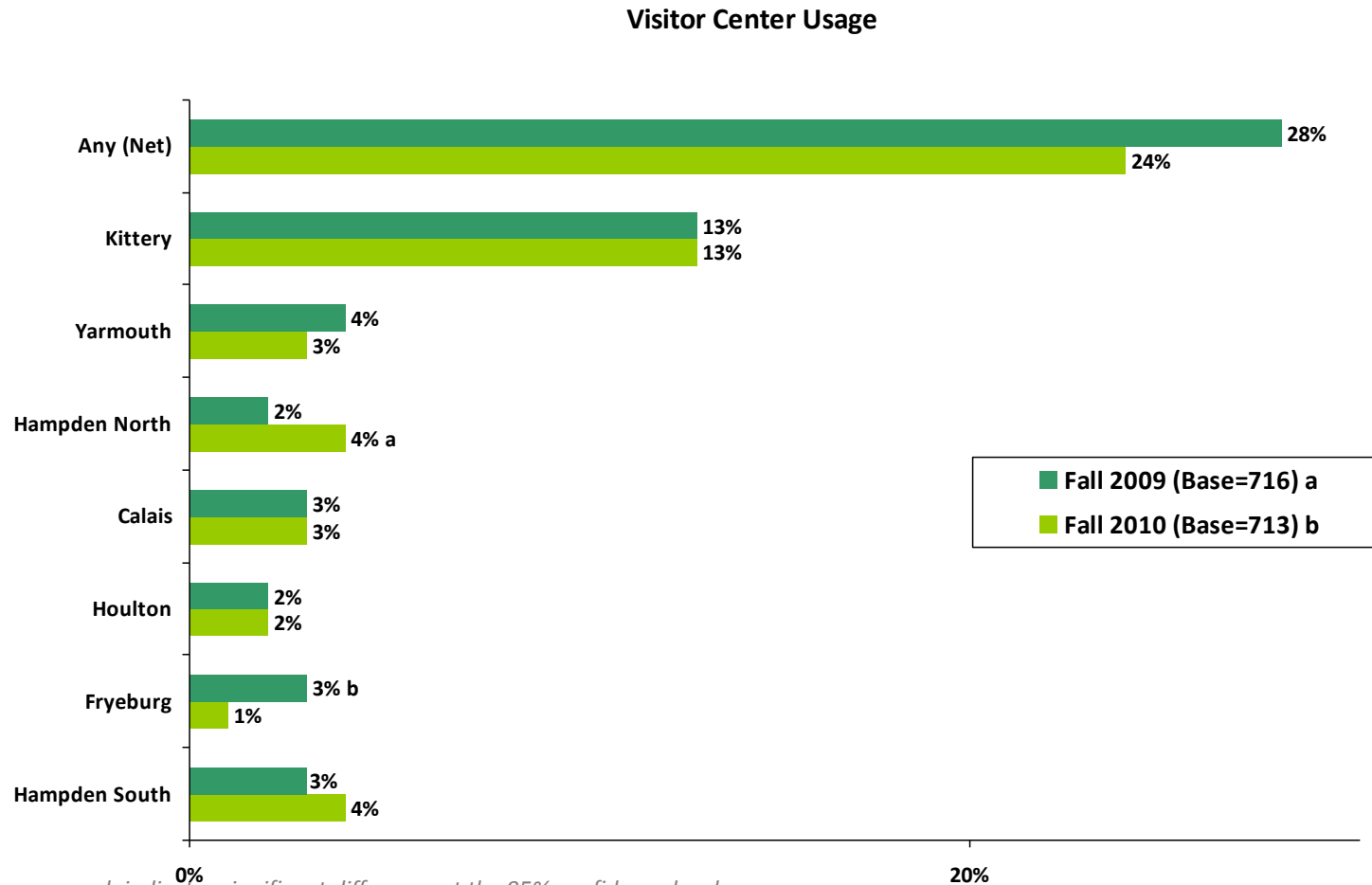


Visitor Centers



Maine Visitor Center Usage – Overnight Visitors

- Among overnight visitors, there was a significant increase in stops at the Hampden North visitor center and decrease in stops at the Fryeburg center. The remaining centers had similar levels of visitation in the fall 2010 compared with the fall 2009.



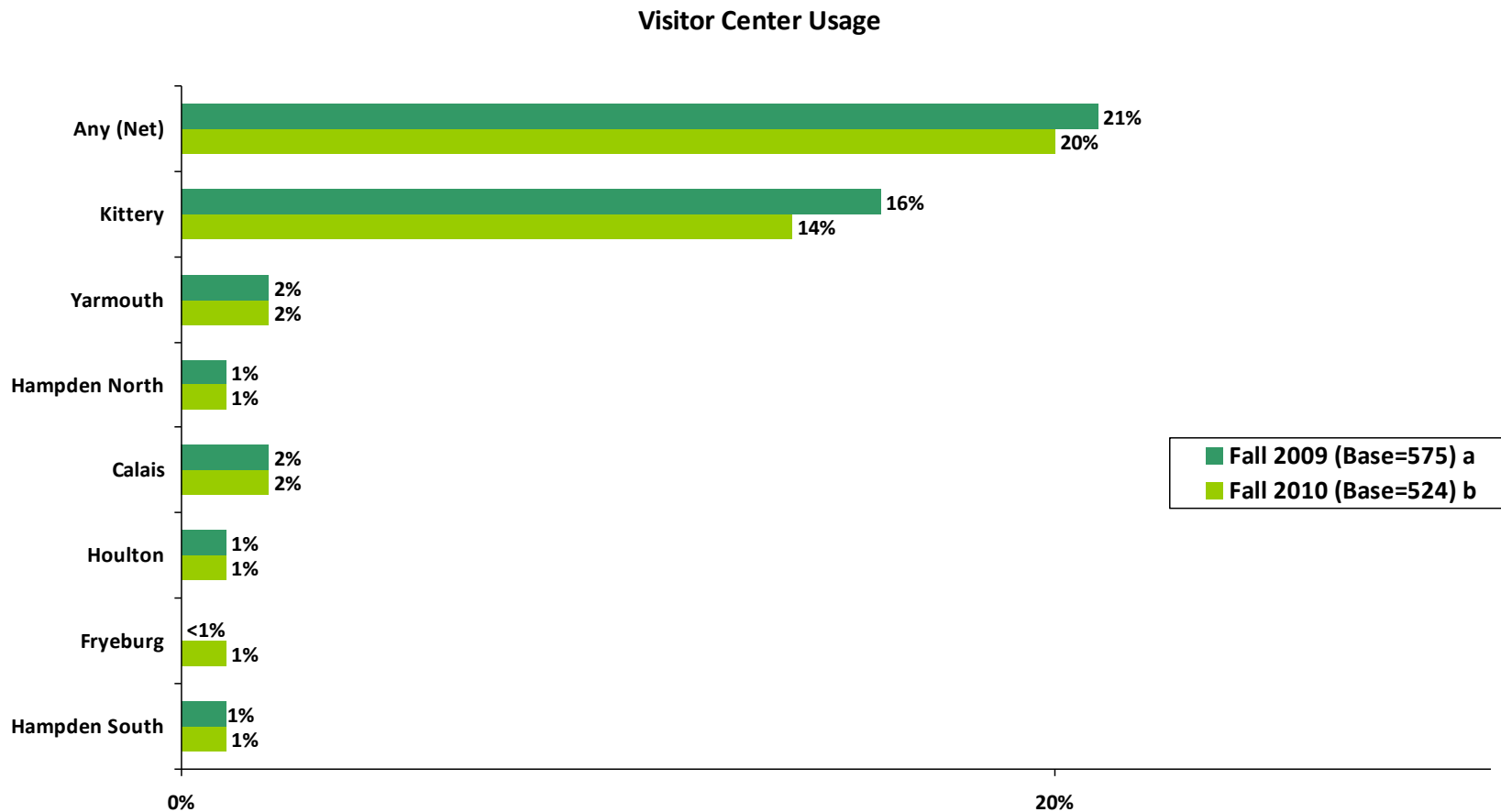
a, b indicates significant difference at the 95% confidence level

Regional Q31a. Once you arrived in Maine did you stop in at any of the Maine Visitor Centers? Please select all Visitor Centers you stopped into below.

Note: Question added in 2009.

Maine Visitor Center Usage – Day Visitors

- There were no significant year-to-year differences in the percentage of day visitors who went to any of the Maine Visitor Center during the fall as compared to fall 2009.



a,b indicates significant difference at the 95% confidence level

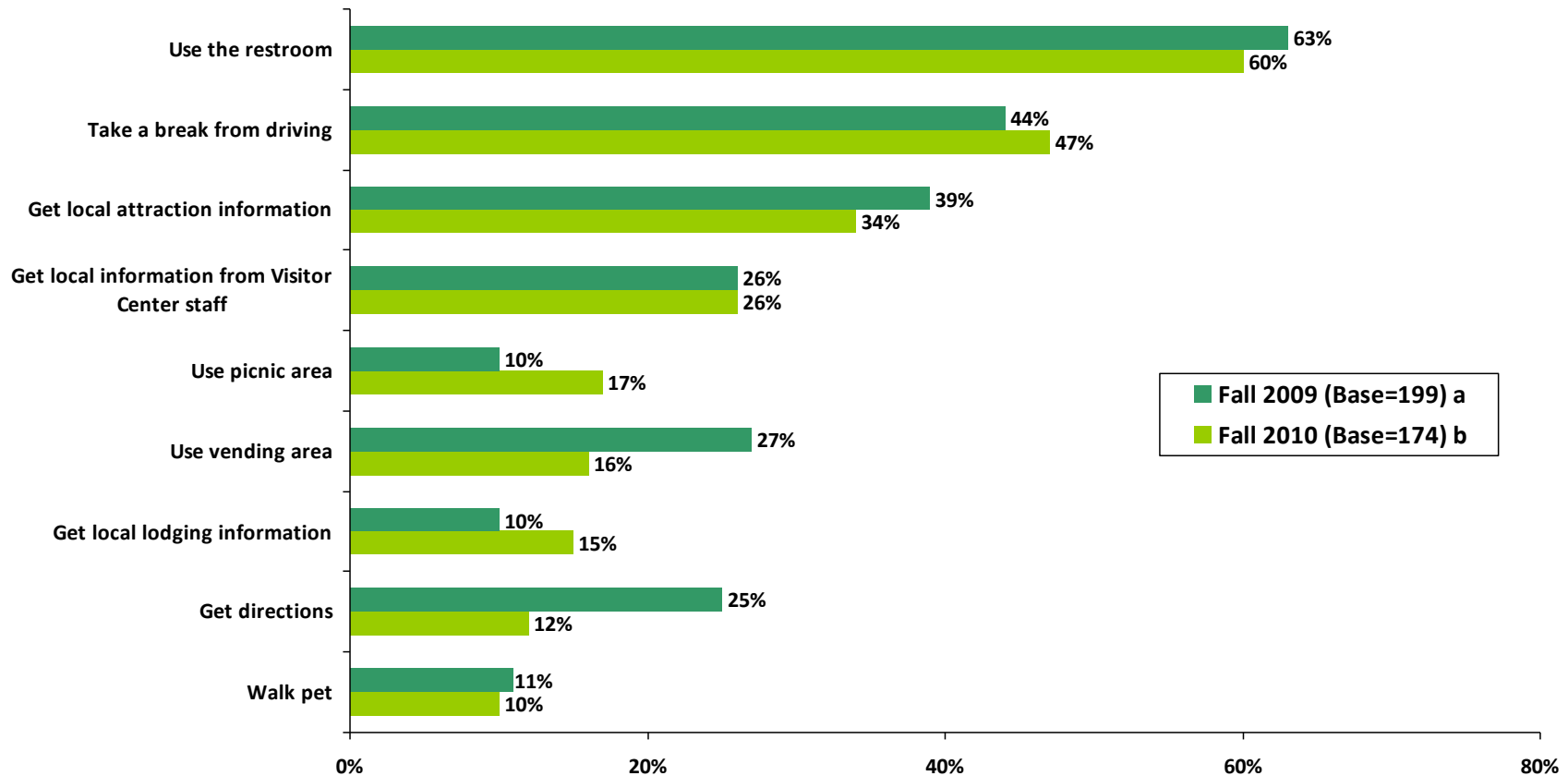
Day Q12a. Once you arrived in Maine did you stop in at any of the Maine Visitor Centers? Please select all Visitor Centers you stopped into below.

Note: Question added in 2009.

Maine Visitor Center Usage – Overnight Visitors

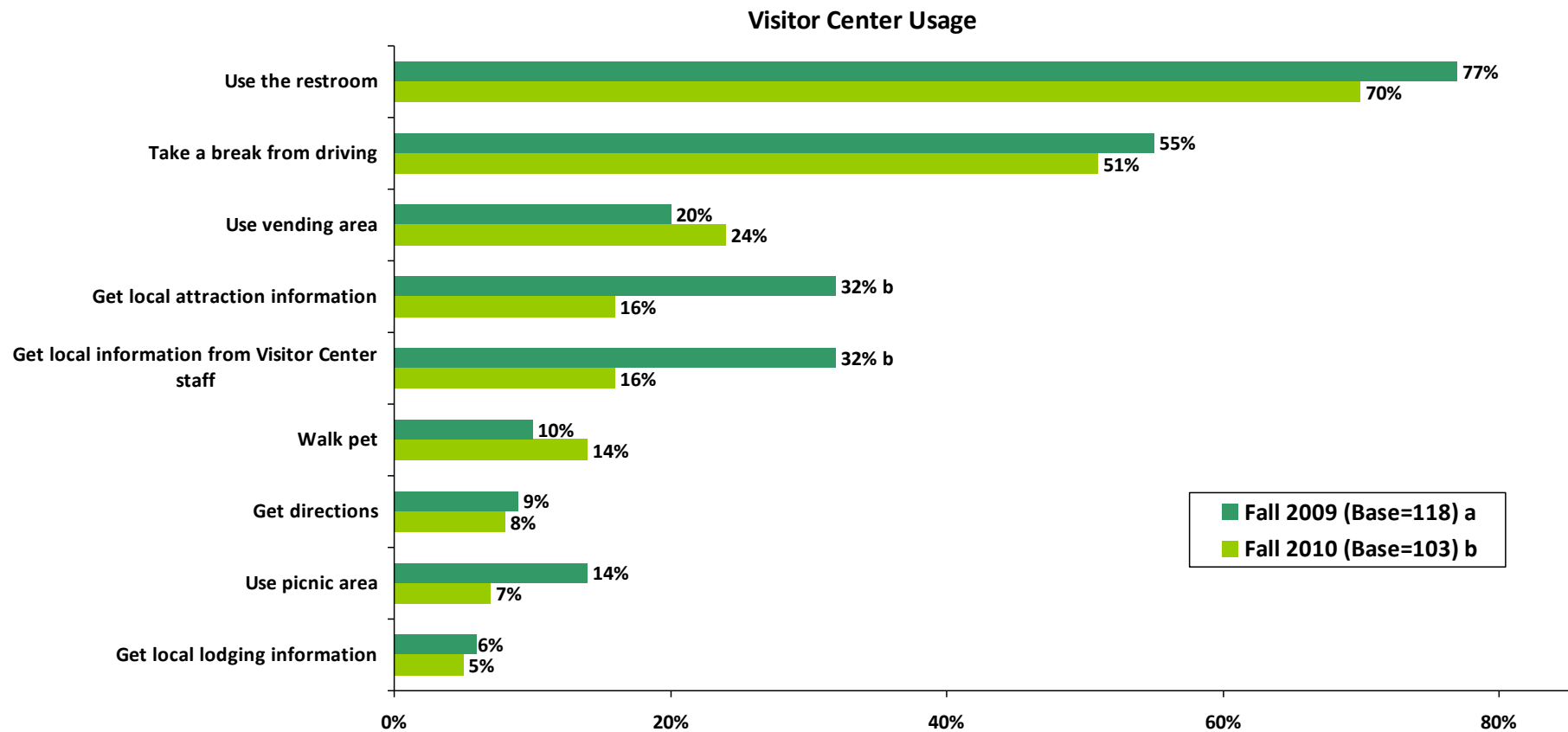
- Use of the restroom and taking a break from driving remain the most common activities at the visitor centers.

Visitor Center Usage



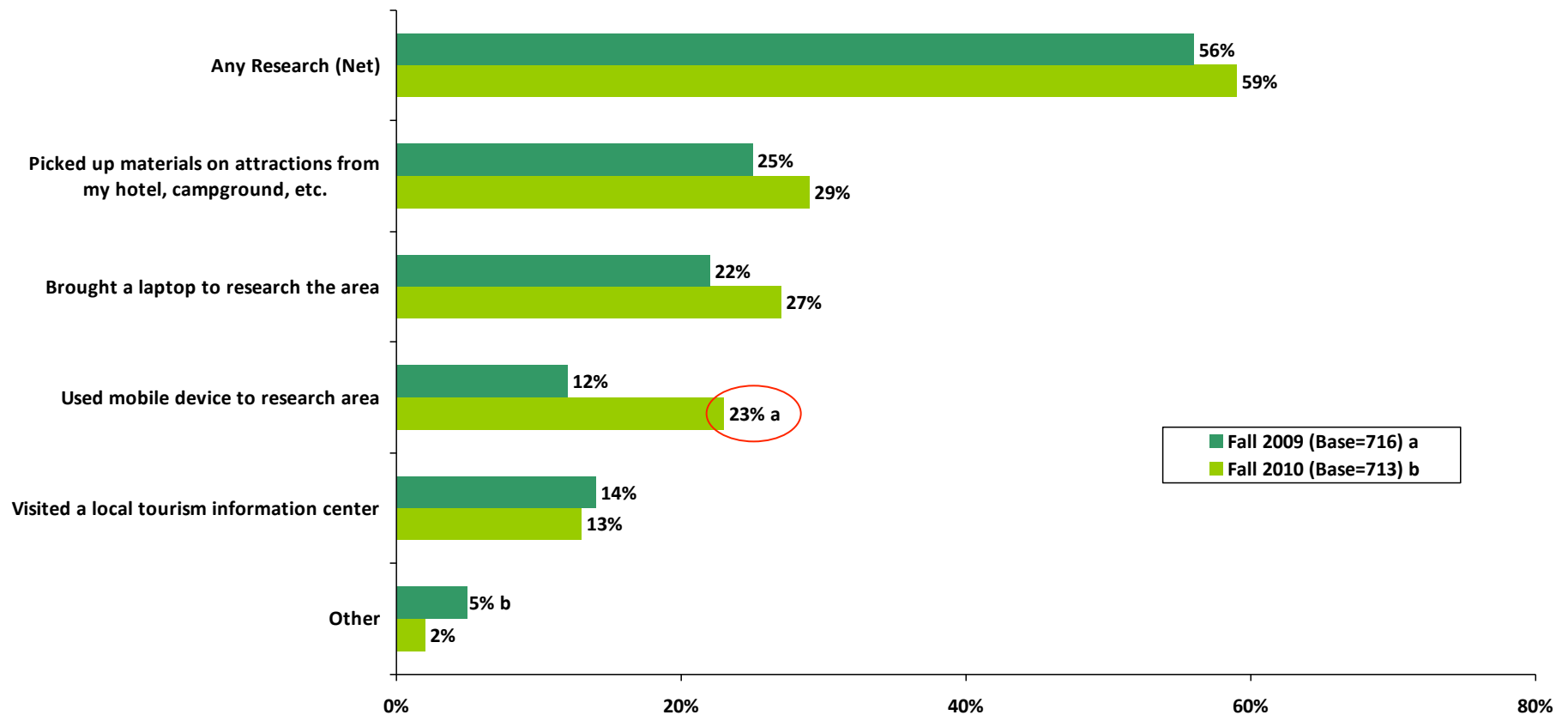
Maine Visitor Center Usage – Day Visitors

- Perhaps due to the increased ease in getting local information on mobile devices, day visitors were less likely to get local information while stopped at Maine Visitor Centers during the fall of 2010.



Research While In Maine – Overnight Visitors

- There was a significant year-over-year increase in the percentage of overnight visitors to Maine who used their mobile device to research the area while they were in Maine. One in four travelers to Maine now use a mobile device to aid their travel while here. This could be a function of the increased accessibility of local information by various forms of technology.



a,b indicates significant difference at the 95% confidence level

Regional Q 31d. Once you arrived in Maine did you continue to research places to go and things to do during your visit using any of the following?

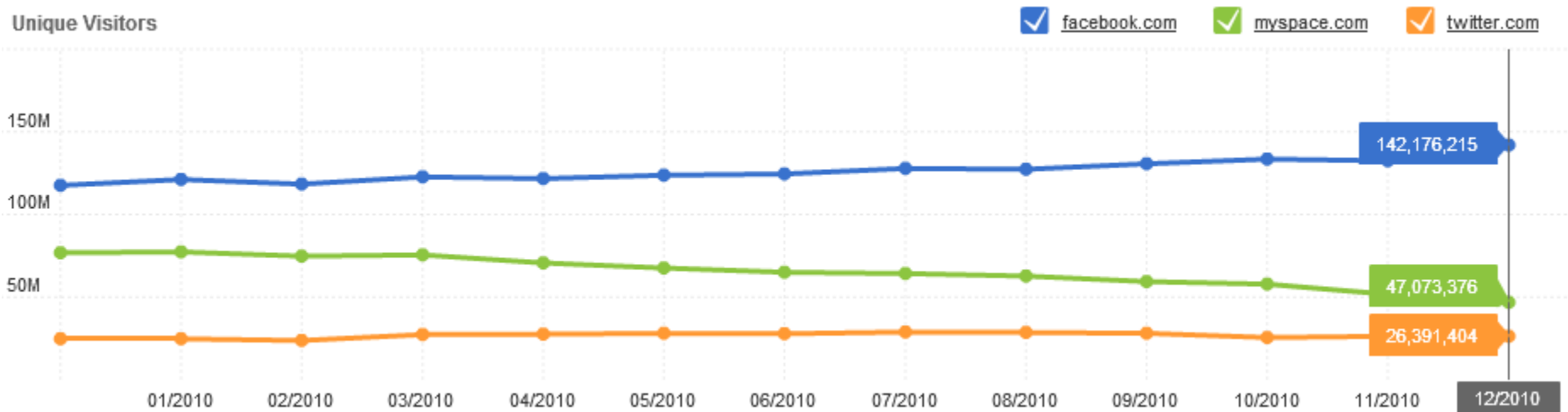
Note: Question added in 2009.

Search Engines & Social Networking



Social Networking Site Usage - Overall

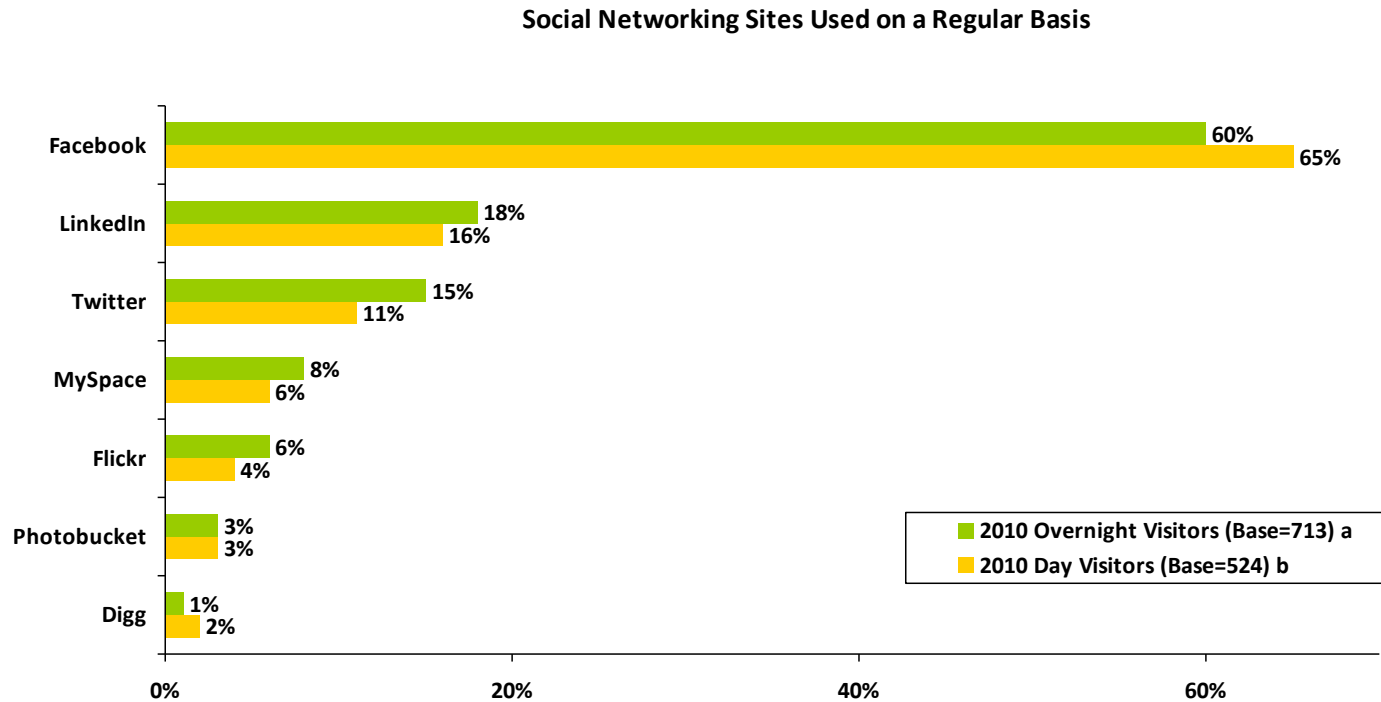
- Among the overall online population in the United States, Facebook remains the dominant social networking site in terms of overall traffic. While MySpace remains a distant second, its year-over-year traffic has been slowing while site traffic for Twitter – currently in third place – has seen year-over-year growth.



December 2010	Facebook	MySpace	Twitter
Unique Visitors	142,176,215	47,073,376	26,391,404
Monthly Change	+7.17%	-9.25%	-38.82%
Yearly Change	+20.88%	+0.02%	+6.47%

Social Networking Site Usage – Maine Visitors

- In line with national trends, Facebook is the most widely used social networking site among visitors to Maine during fall 2010. LinkedIn and Twitter are together in a distant second to Facebook’s dominant position.
- Tying together this slide with the previous, it’s clear that Facebook holds the greatest current social networking opportunity for Maine. Aside from Facebook, the type of content and growth of Twitter also make it a prime resource for social networking messaging for the state.



Conclusions



Conclusions

- **Visitation is showing positive signs of rebounding.** There are again single digit increases in visitation over what fall 2009. Importantly, there are increases in both day and overnight visitation, and among all trip purposes. This corresponds well with what is being seen nationally, as the national travel picture continues to show signs for optimism.
- **Overall, the travel picture seems to be returning slowly to pre-recession norms.** As the economy sluggishly recovers from the depths of the recession, travelers are beginning to slowly return to their normal routines. We are seeing final trip planning decisions made a little bit more in advance as travelers become more confident in committing to a trip. Additionally, overnight travelers to Maine this fall were more engaged in outdoor recreation and specific events, while still finding time to shop and dine out, signs that travelers are filling up their itineraries again with more diverse options.
- **A loyal base of visitors came to Maine and were extremely pleased.** As we have seen in the past, Maine continues to draw upon its past visitors, who enjoy returning to the state to enjoy everything Maine has to offer. These visitors are not only likely to return themselves, but continue to be excellent ambassadors for the state, recommending trips to Maine to their family and friends.

Conclusions

- **Spending levels are generally higher, another optimistic sign.** Overnight visitor spending saw significant year-over-year increases in several categories in fall 2010, most importantly in lodging expenditures. This increase in lodging expenditures is the clearest sign of an increased willingness among travelers to spend money on their trips. Importantly, this increase in spending on lodging does not appear to have displaced spending in other areas, as all other categories were either consistent or saw increases over fall 2009. Among day visitors, although retail spending was not quite as high as was seen in the fall of 2009, all other categories saw increases in spending over a year ago.
- **Maine's beautiful scenery and recreation options combine to create a great place to spend quality time with family or friends.** When asked about the highlight of their trip to Maine, respondents consistently point to the quality time they were able to spend with family and friends. Similarly, when asked to evaluate Maine compared to other destinations, visitors point to the friendliness of the people and the overall experience. While descriptions of what best describe Maine as a vacation destination focus on its beauty, ultimately what makes a great vacation is often connections with people. As the travel industry rebounds, Maine will need to ensure it emphasizes the attributes that make it a great option for a leisure trip. This includes a wide breadth of vacation activities including great food, great shopping, and great people.



DPA
201 Lafayette Center
Kennebunk, ME 04043
207.985.1790
www.digitalresearch.com

