

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

Prepared by



October 2010



Table of Contents

• Introduction and Methodology	3
• Maine's Overnight Travel Market Share	9
• Summer Visitation to Maine	14
• Maine Travel Profile – Overnight & Day Visitors	16
<i>Trip Profile</i>	17
<i>Trip Evaluation</i>	34
• Maine Overnight Visitor Trip Planning	47
• Visitor Centers and Social Networking	56
• Conclusions	63

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;
 - Understand why some travelers choose to visit Maine while others go elsewhere;
 - 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-May and early September 2010. It also compares to data collected during the summer 2009 season.
- Data was collected between June 15, 2010 and September 21, 2010. The number of completed surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 1,325
 - Maine Day Visitor Survey – 763
 - National Omnibus Survey – 9,780
- The report summarizes key measures from data collected for the summer 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, summer 2010 data was compared to summer 2009 data to show significant year-over-year differences.

Research Context

- **Weather:**

- “The summer of 2010 in Portland will be remembered for its record tying heat. The average temperature for the summer was 68.7 degrees which tied 1988 as the warmest summer on record at the Portland Jetport.”
- “Last year, Summer 2009 was the wettest summer on record with 22.31 inches of rain. This year’s summer in Portland measured less than half that amount with just 10.48 inches of rain. Still the ten and a half inches of rain was above normal by nearly an inch”

	June	July	August	Summer
Average Temperature (vs. 30-year average)	64.6 (1.7)	72.3 (3.6)	69.3 (2.1)	68.7 (2.4)
Measured Precipitation in Inches (vs. 30-year average)	3.47 (.19)	4.06 (.74)	2.9 (-.5)	10.48 (.83)
(NOAA.gov)				

- **Economy:**

- **Consumer Confidence:** Declined in July, but improved moderately in August. The Index for August stands at 53.5 (1985=100), up from 51.0 in July, still well below 90, which is considered a healthy economy. (Conference Board)
- **Employment:** August 2010 unemployment rate was 8.0%, compared with 9.5% in September 2009 and 6% in September 2008. (Bureau of Labor Statistics)

- **Gasoline:**

- **Prices:** Gas prices were in the \$2.70-\$2.90/gallon range during the summer of 2010. (Fuel Gauge Report)

Maine's Overnight Travel Market Share



National Travel Context

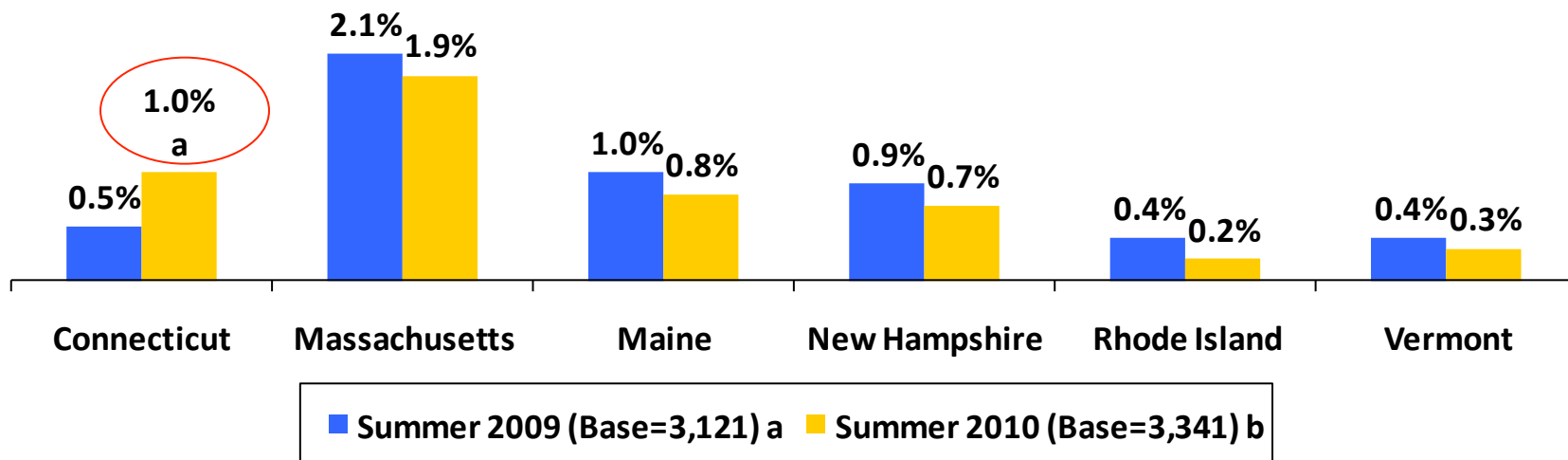
- During the summer of 2009, 41% of U.S. residents took an overnight leisure trip – compared to 38% for the same time period in 2009.
- Likewise, the percent of U.S. residents who took an overnight VFR trip during this period increased to 50% in 2010 from 48% in 2009.
- Business travel also increased during this timeframe – from 16% in 2009 to 18% in 2010.
- Still, 2010 has been a challenging year for the industry overall. The combinations of a slowly recovering economy, pent-up demand for travel, and one-time disturbances such as the Gulf Oil Spill have created a great deal of uncertainty.
 - “In my more than 30 years of studying this industry and making forecasts, I don’t think I have ever seen a situation quite as ambiguous as we find today.” – Dr. Suzanne Cook, U.S. Travel Outlook, October 2010.

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

Summer 2010

- Maine's share of total leisure trips taken by U.S. residents remained stable with the share seen in the summer of 2009. However, Connecticut saw a significant increase in its share of leisure trips.

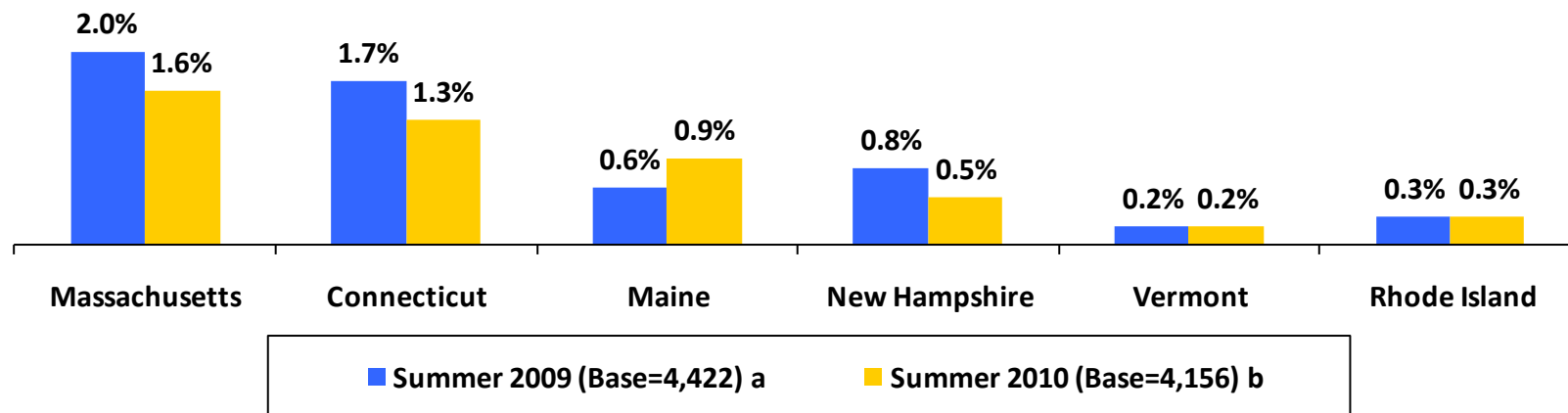
US Leisure Travel Market Share*



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

- Maine's share of VFR trips increased directionally over 2009. Massachusetts and Connecticut continue to be the leaders in VFR travel among this competitive set, although share for those states experienced directional declines year-over-year.

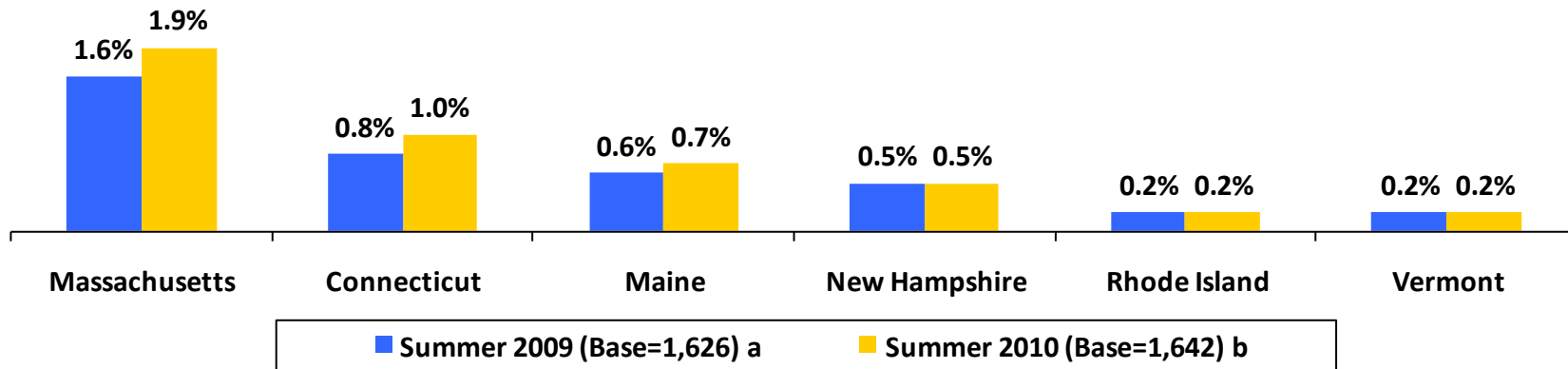
US Travel to Visit Friends/Relatives Market Share*



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

- Business travel saw directional improvement for Massachusetts, Connecticut, and Maine with all other states showing year-over-year stability in this measure.

US Business Travel Market Share*



Summer Visitation to Maine



Estimated Visitation to Maine*

- During the summer of 2010, Maine had an estimated 9.5 million overnight visitors and 13.7 million day visitors.
- Compared to Summer 2009, there was a 9% increase in the number of overnight trips, and a 14% increase in overnight visitors to Maine.
- Day visitation also experienced year-over-year growth. Day trips were up 13% in the summer of 2010 while the number of day visitors were up 8% during this time period.

Overnight Visitation					
	Leisure	VFR	Business	Total	2009 v. 2010
Overnight Trips	1,747,563	1,256,061	565,017	3,568,640	9%
Overnight Visitors	5,190,261	3,228,076	1,096,133	9,514,470	14%
Day Visitation					
	Leisure	VFR	Business	Total	2009 v. 2010
Day Trips	3,054,081	1,708,363	1,044,242	5,806,687	13%
Day Visitors	8,123,856	4,014,653	1,576,806	13,715,316	8%

Maine Travel Profile Overnight and Day Visitors



Visitor Profile



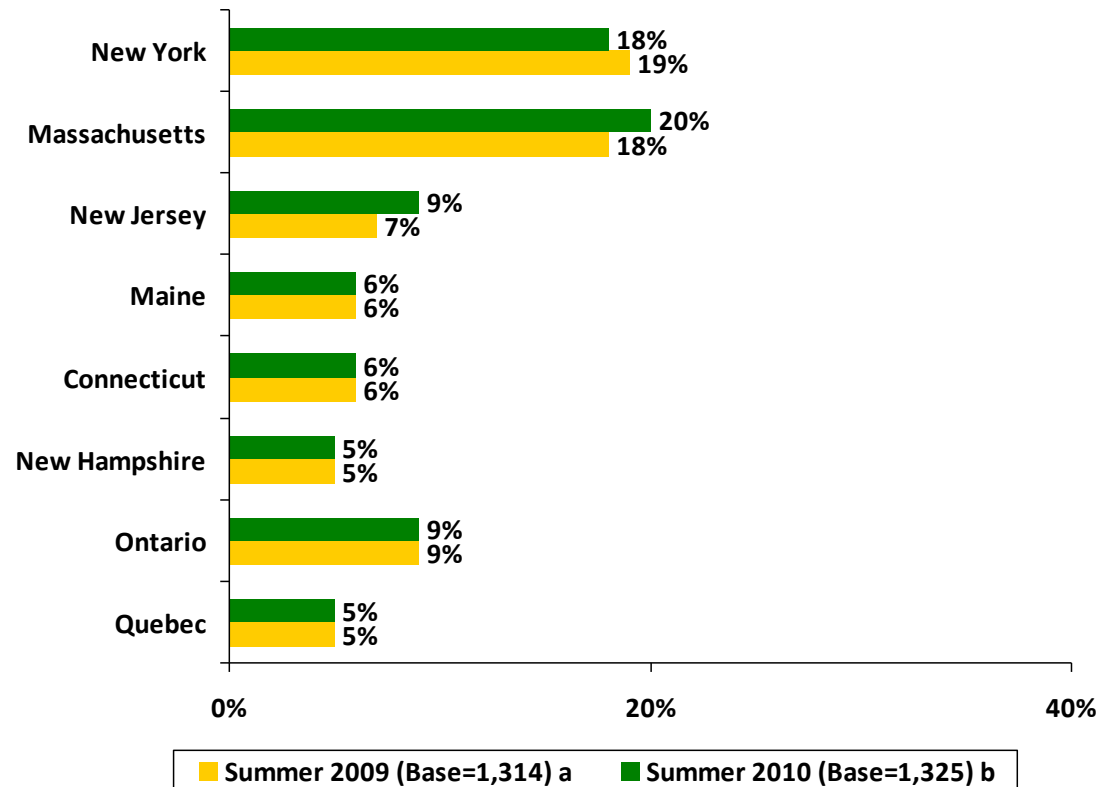
Demographics

- Compared with summer 2009, both day and overnight visitors to Maine in the summer of 2010 were a bit older than those visiting in the summer of 2009.

	Overnight Visitors		Day Visitors	
	Summer 2009 (Base=1,314) a	Summer 2010 (Base=1,325) b	Summer 2009 (Base=809) c	Summer 2010 (Base=763) d
Mean Age	43.0	44.6a	42.5	45.9c
< 35	31%	30%	36%d	29%
35 - 44	22%	20%	15%	16%
45 - 54	22%	23%	21%	20%
55 +	26%	28%	27%	34%c
Mean Income	\$104,520	\$102,710	\$88,434	\$89,770
< \$50,000	14%	15%	25%	25%
\$50,000 - \$99,000	30%	35%a	45%	43%
\$100,000 +	37%	35%	30%	32%
Female	43%	47%	57%d	50%
College Degree or Higher	74%	78%	73%	74%
Married	58%	54%	56%	59%
Employed Full Time	63%	63%	64%	61%

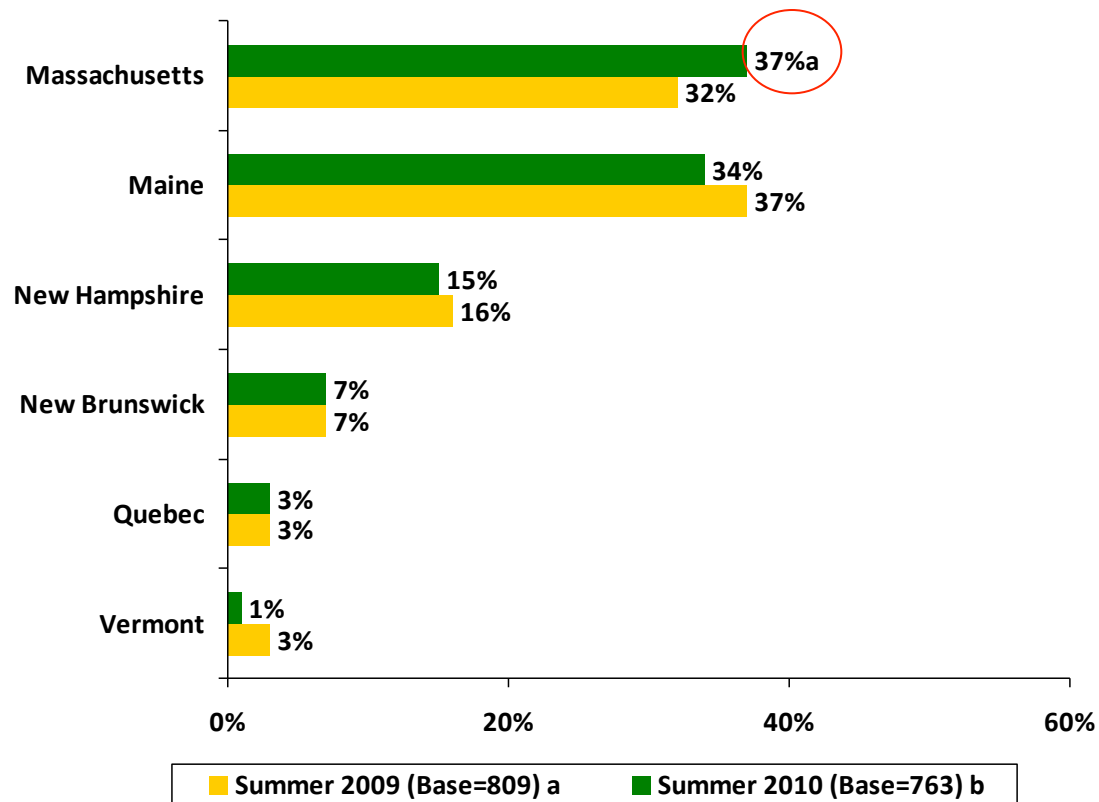
Residence of Maine Overnight Visitors

- There were no significant year-over-year differences in the residential profile of overnight visitors to Maine.



Residence of Maine Day Visitors

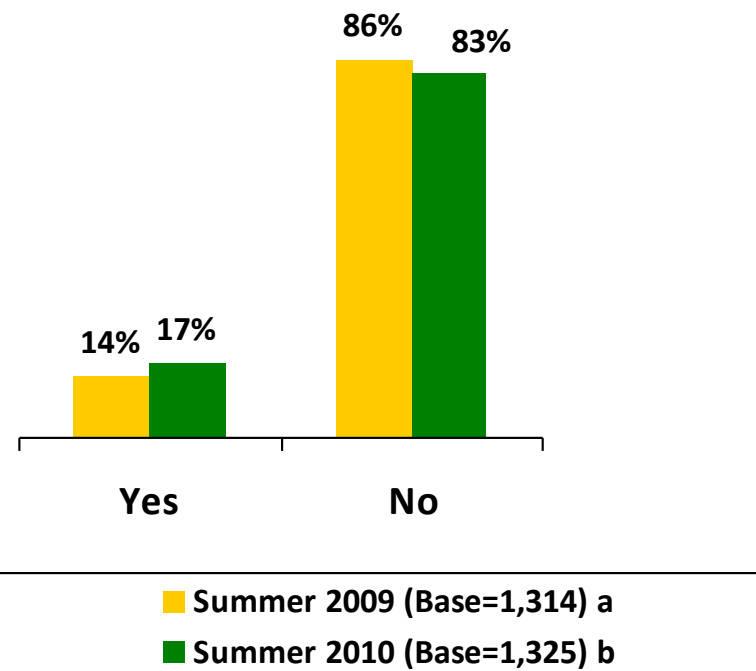
- During the summer of 2010, there was an increase in day visitors from Massachusetts compared to the summer of 2009.



Repeat versus First Time Overnight Visitors

- As we have seen in the summer of 2009, the vast majority of overnight visitors to Maine in the summer of 2010 were repeat visitors to that state.

First Time Versus Repeat Visitation to Maine



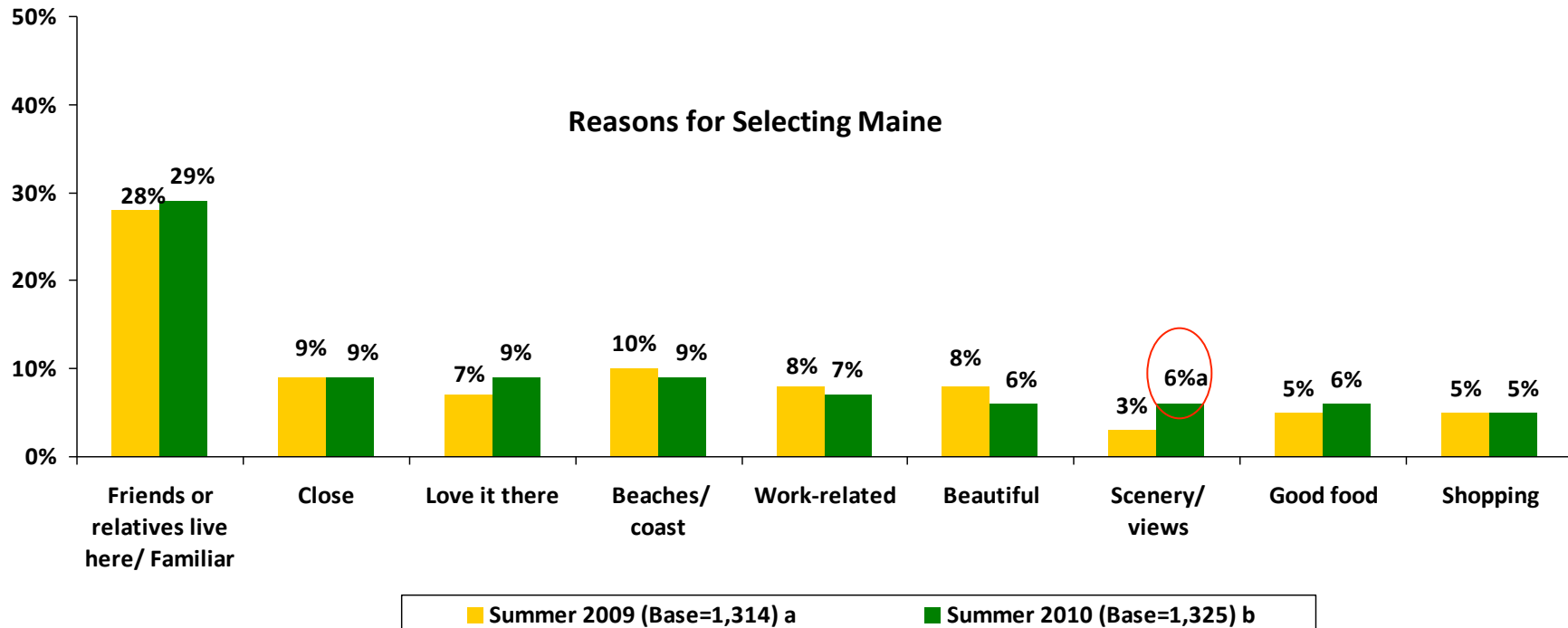
Trip Profile



Reasons for Selecting Maine – Overnight Visitors

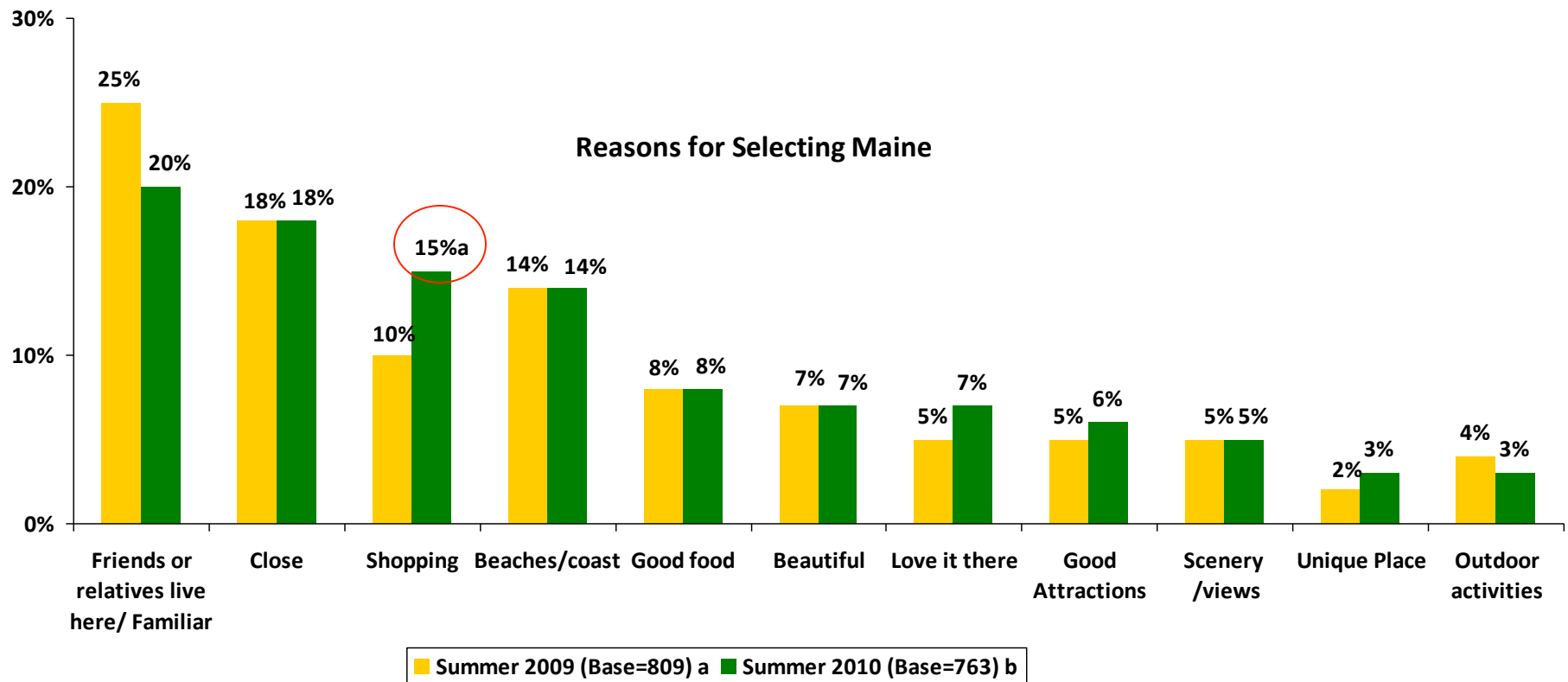
Summer 2010

- Friends, family, and familiarity continue to be the top reasons why overnight visitors to Maine select the state as a travel destination.
- The only significant year-over-year difference in this question was an increase in 2010 overnight visitors who selected Maine due to the scenery/views.



Reasons for Selecting Maine – Day Visitors

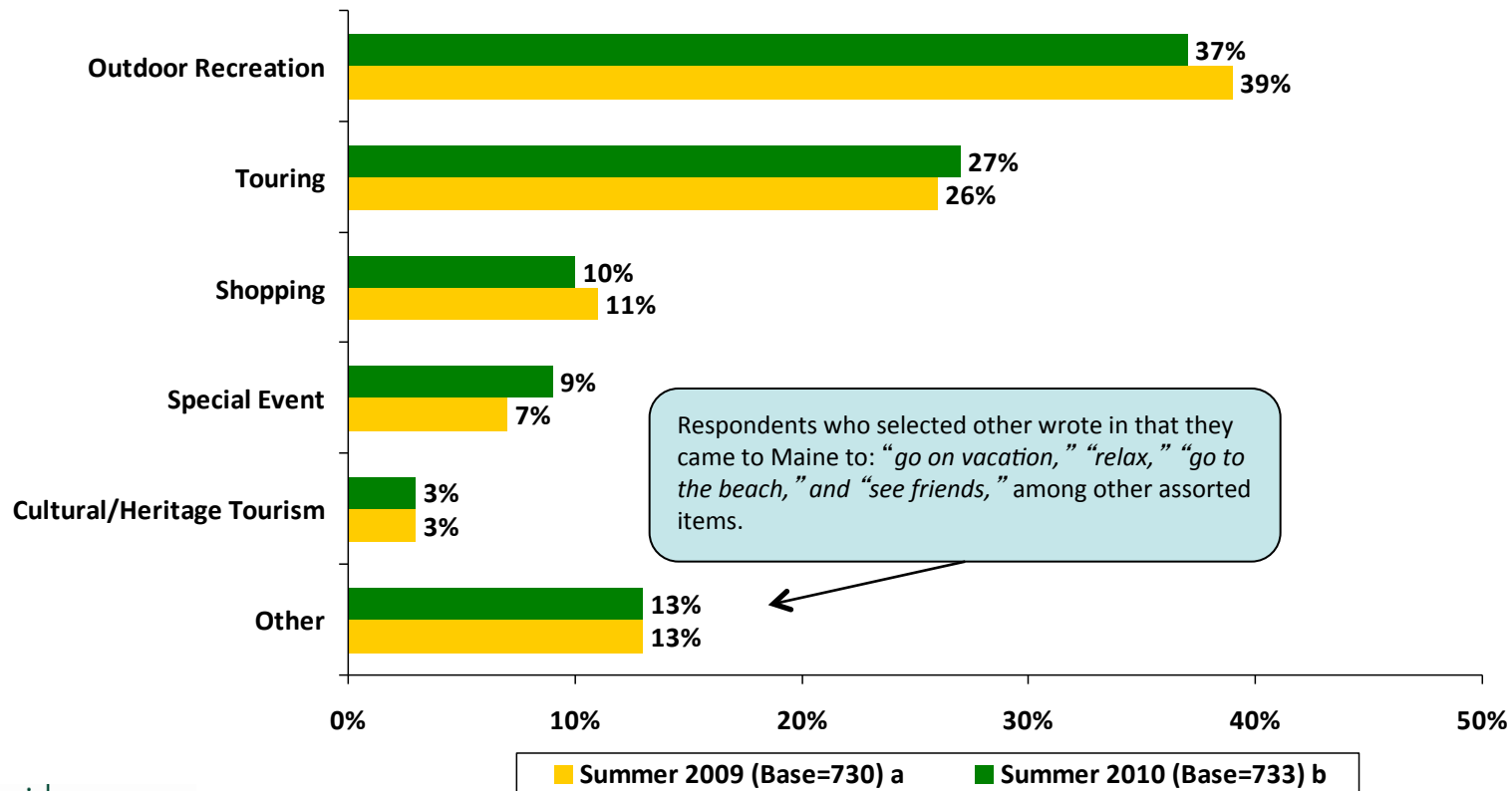
- For day visitors, the reasons for choosing Maine for a trip in the summer of 2010 are largely consistent with the reasons chosen in summer 2009.
- There is an increase in the summer of 2010 of day visitors who chose Maine because of the shopping.



Primary Purpose of Overnight Leisure Trips

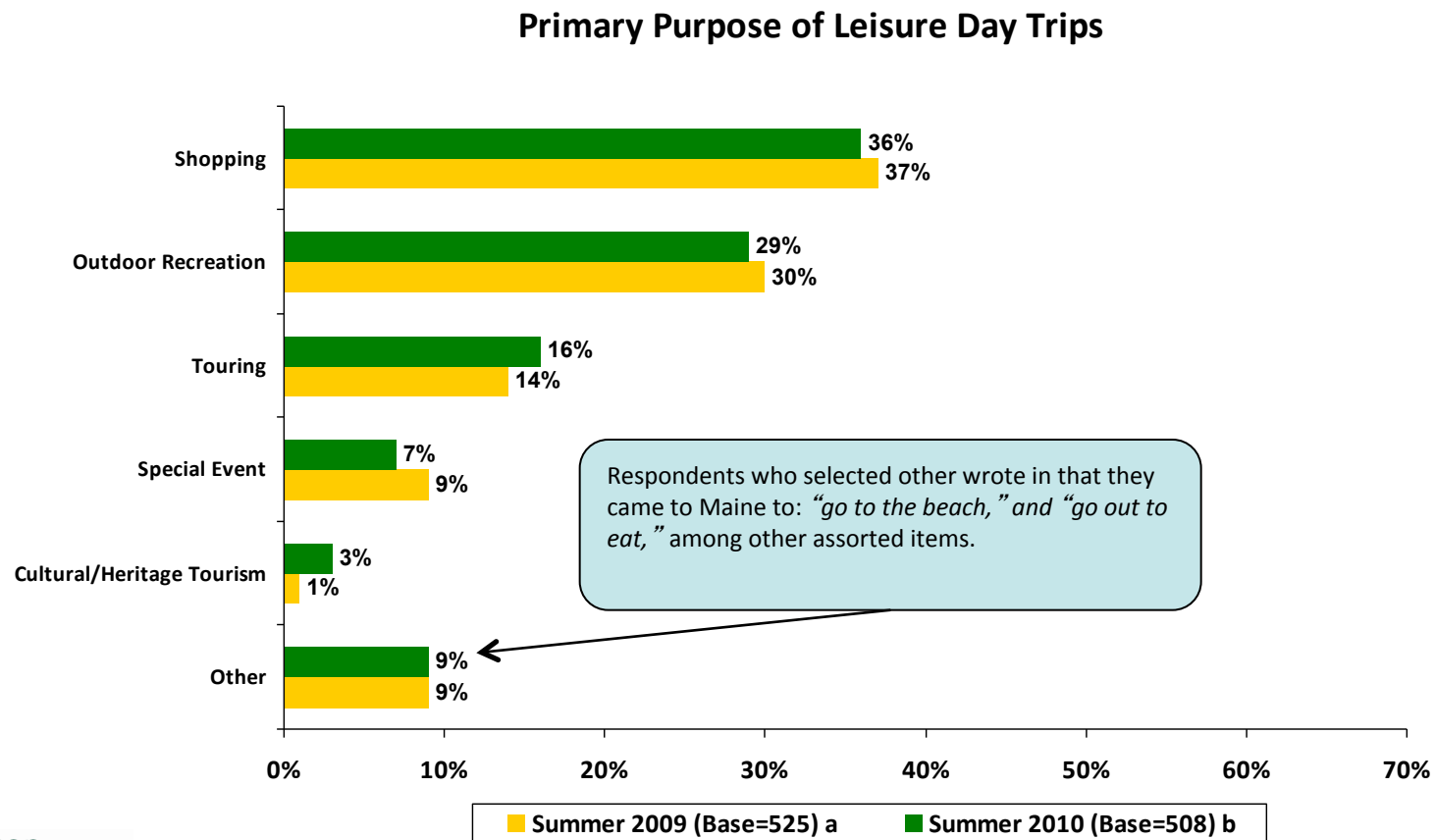
- The primary purpose for taking an overnight leisure trip to Maine most commonly cited by summer 2010 travelers is *outdoor recreation*, similar to what we saw in the summer of 2009. Secondly, one in four overnight travelers came to Maine for the primary purpose of *touring*.

Primary Purpose of Overnight Leisure Trips



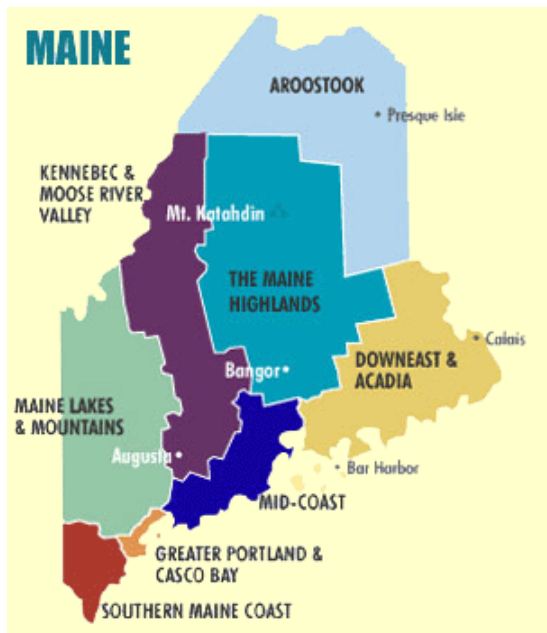
Primary Purpose of Leisure Day Trips

- There were no significant year-over-year changes to the primary purpose day visitors came to Maine, as Shopping and Outdoor Recreation continue to be the top reasons visitors take day leisure trips to the state.



Regions Visited within Maine

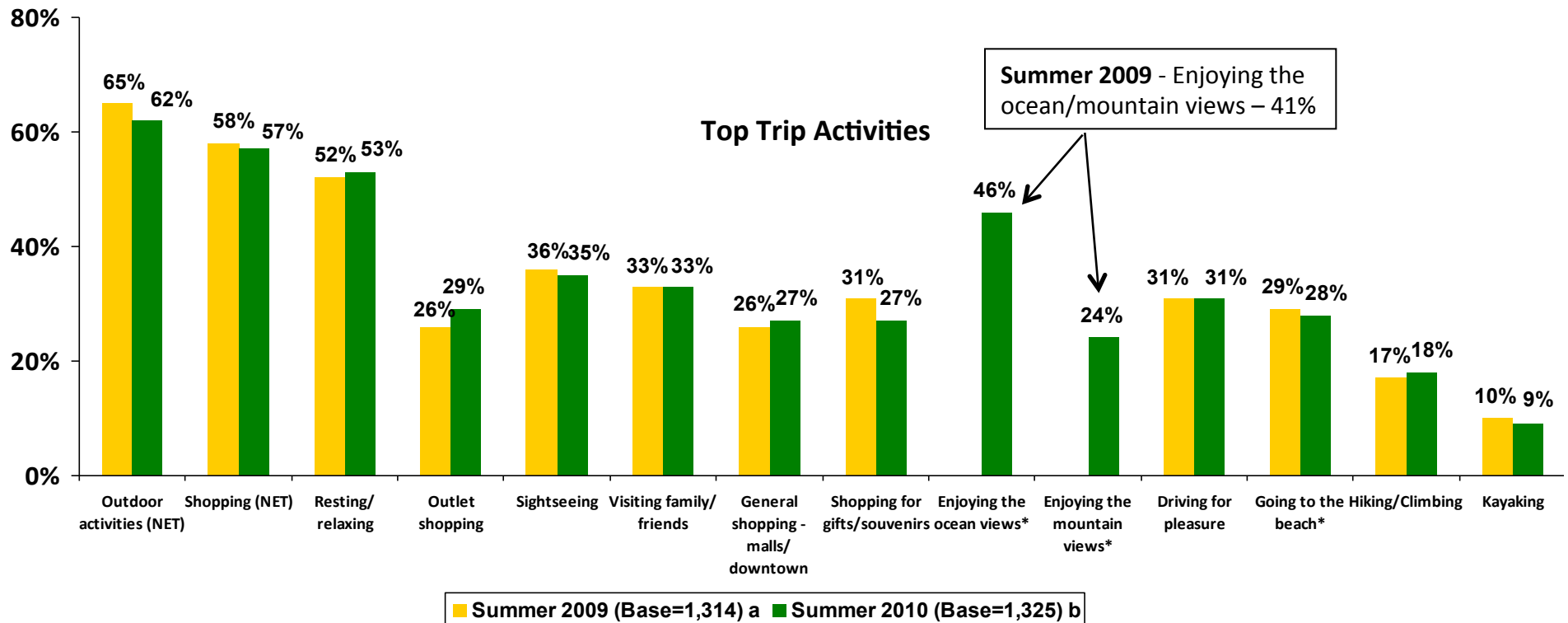
- There was a significant year-over-year increase in the percentage of overnight visitors who went to Downeast & Acadia as their primary region this summer. Conversely, there was a decrease in day visitors who went to Mid-Coast Maine as the primary region for their trip.



	Overnight Visitors		Day Visitors	
	Summer 2009 (n=1,314) a %	Summer 2010 (n=1,325) b %	Summer 2009 (n=809) c %	Summer 2010 (n=763) d %
Southern Maine Coast	25%	25%	34%	40%
Portland/Casco Bay	13%	13%	15%	15%
Maine Lakes and Mountains	9%	9%	7%	8%
Mid-Coast	13%	14%	14% ^d	9%
Kennebec & Moose River Valley	7%	6%	7%	8%
The Maine Highlands	12%	10%	9%	8%
Downeast & Acadia	16%	21% ^a	11%	8%
Aroostook	4%	2%	3%	4%

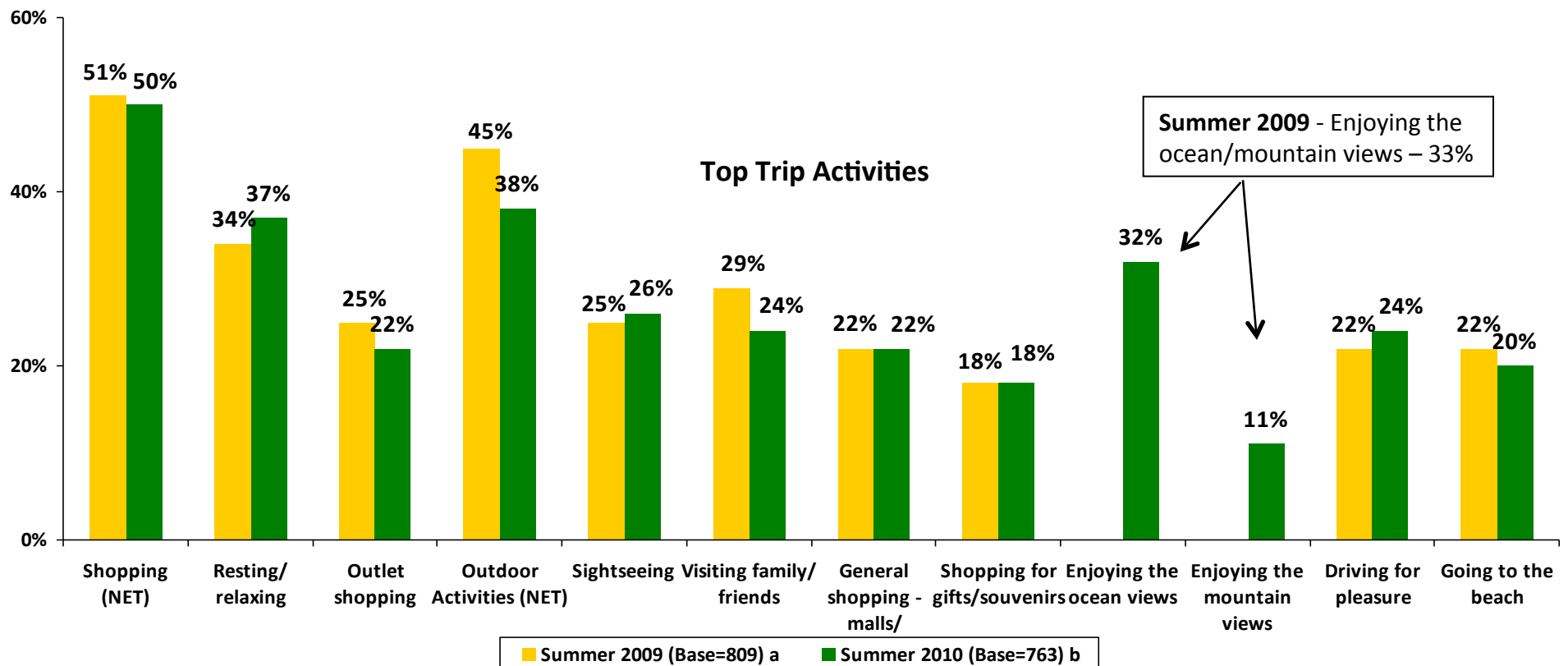
Trip Activities – Overnight Visitors

- There were no significant year-over-year changes in the activities that overnight visitors to Maine reported engaging in during their visits to Maine.
- As in past summers, outdoor recreation, shopping, resting/relaxing, and enjoying the views were all activities that were frequently engaged in during the summer of 2010.



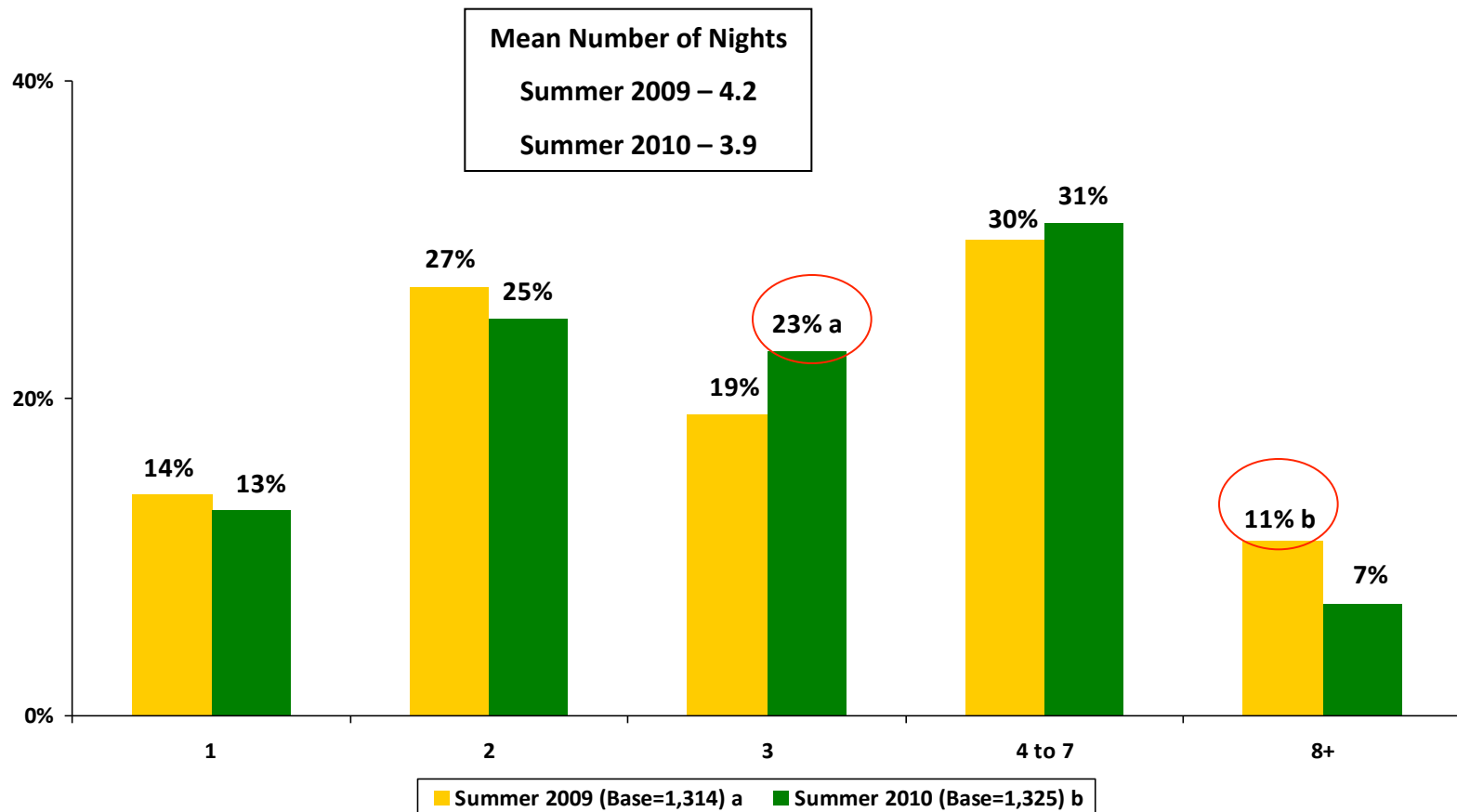
Trip Activities – Day Visitors

- As with overnight travelers, there were no significant year-over-year changes in the activities that day visitors to Maine reported engaging in during their visits to Maine.
- As in past summers, shopping, outdoor recreation, and resting/relaxing were all activities that were frequently engaged in during the summer of 2010.



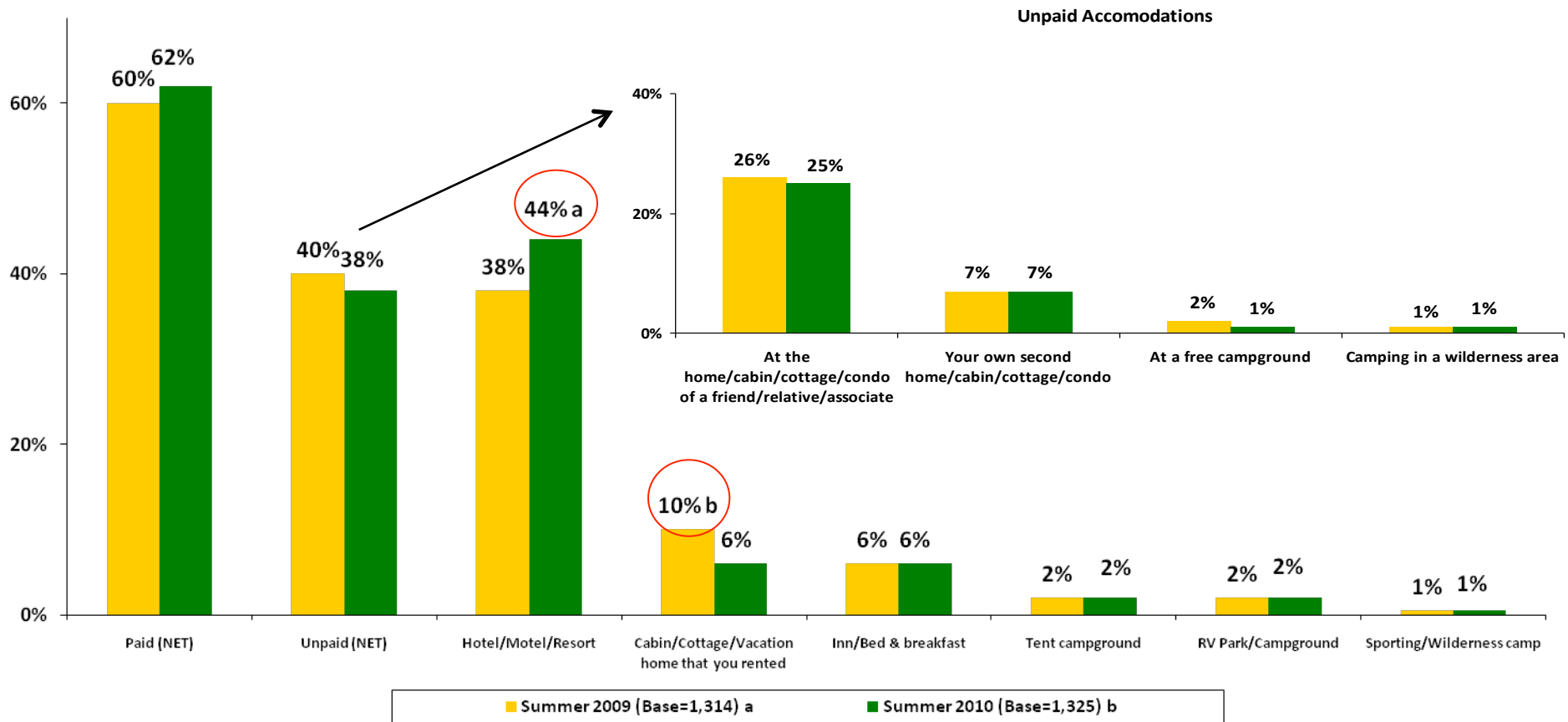
Length of Stay

- During the summer of 2010 trips were less likely to last 8 nights or more than during the summer of 2009. There was a corresponding increase in shorter trips of 3 days.



Types of Lodging

- A majority of overnight visitors stay in paid accommodations. Among those staying in paid accommodations, there is a year-over-year increase in those staying in a *hotel/motel/resort*, and a decline in those staying in a *Cabin/Cottage/Vacation Home*.



Overnight Trip Spending

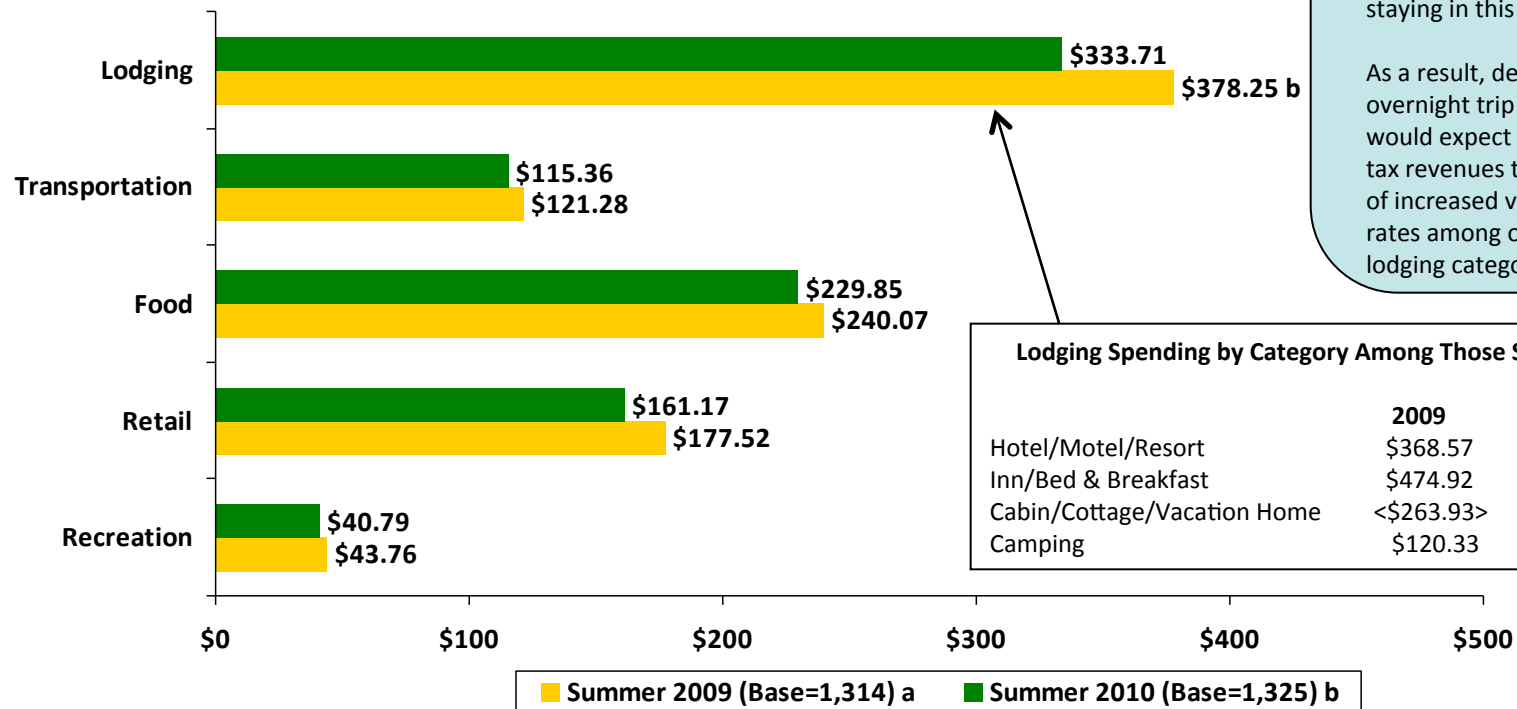
Summer 2010

- Reported overnight lodging expenditures during the summer of 2010 are down significantly over a year ago, although spending in other categories remained statistically stable to a year ago.

Please note that the decline in Lodging expenditures is driven by the cabin/cottage/condo/vacation home category. This category experienced declines in trip expenditures for two primary reasons:

- 1) Less overall use of paid accommodations of this type
- 2) Shorter trip lengths among those staying in this type of lodging.

As a result, despite this reduction in overnight trip spending on lodging, we would expect overall expenditures and tax revenues to be higher, as a result of increased visitation, and strong rates among other, more utilized, lodging categories.

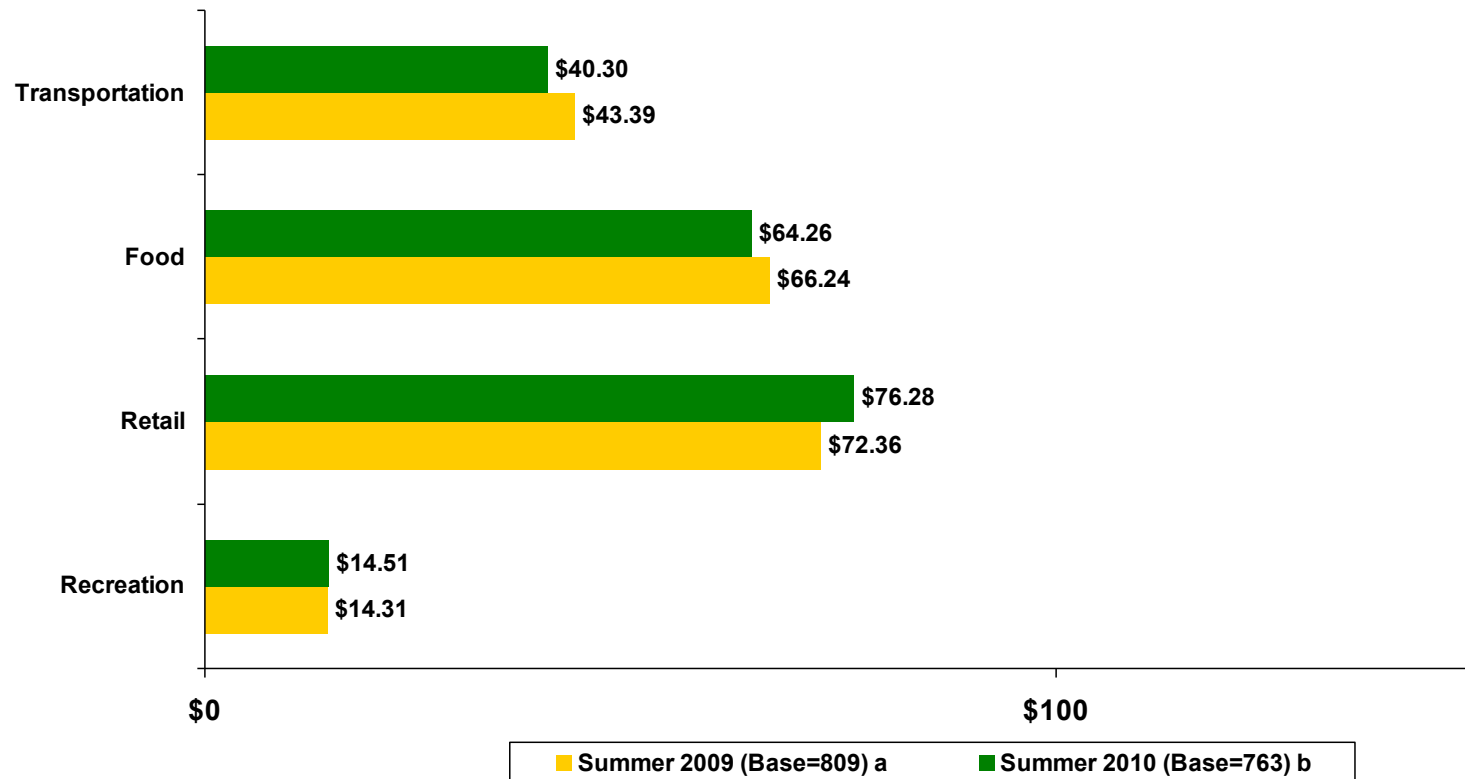


Lodging Spending by Category Among Those Staying in the Category

	2009	2010
Hotel/Motel/Resort	\$368.57	\$384.89
Inn/Bed & Breakfast	\$474.92	\$460.84
Cabin/Cottage/Vacation Home	<\$263.93>	\$131.15
Camping	\$120.33	\$108.95

Day Trip Spending

- Mean spending across all categories in summer 2010 remained statistically stable with spending during the summer of 2009, as travelers continue to be cautious with their spending.

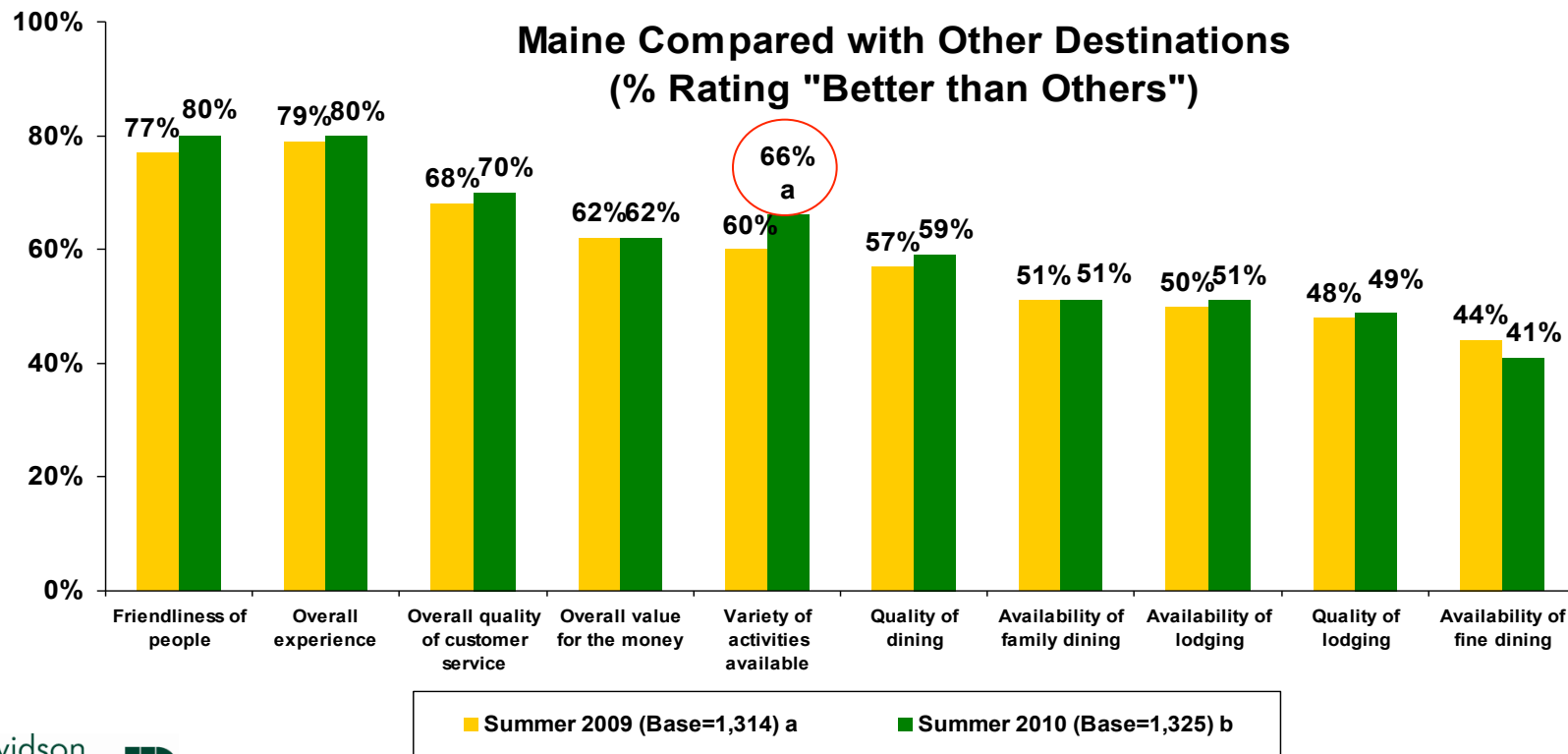


Trip Evaluation



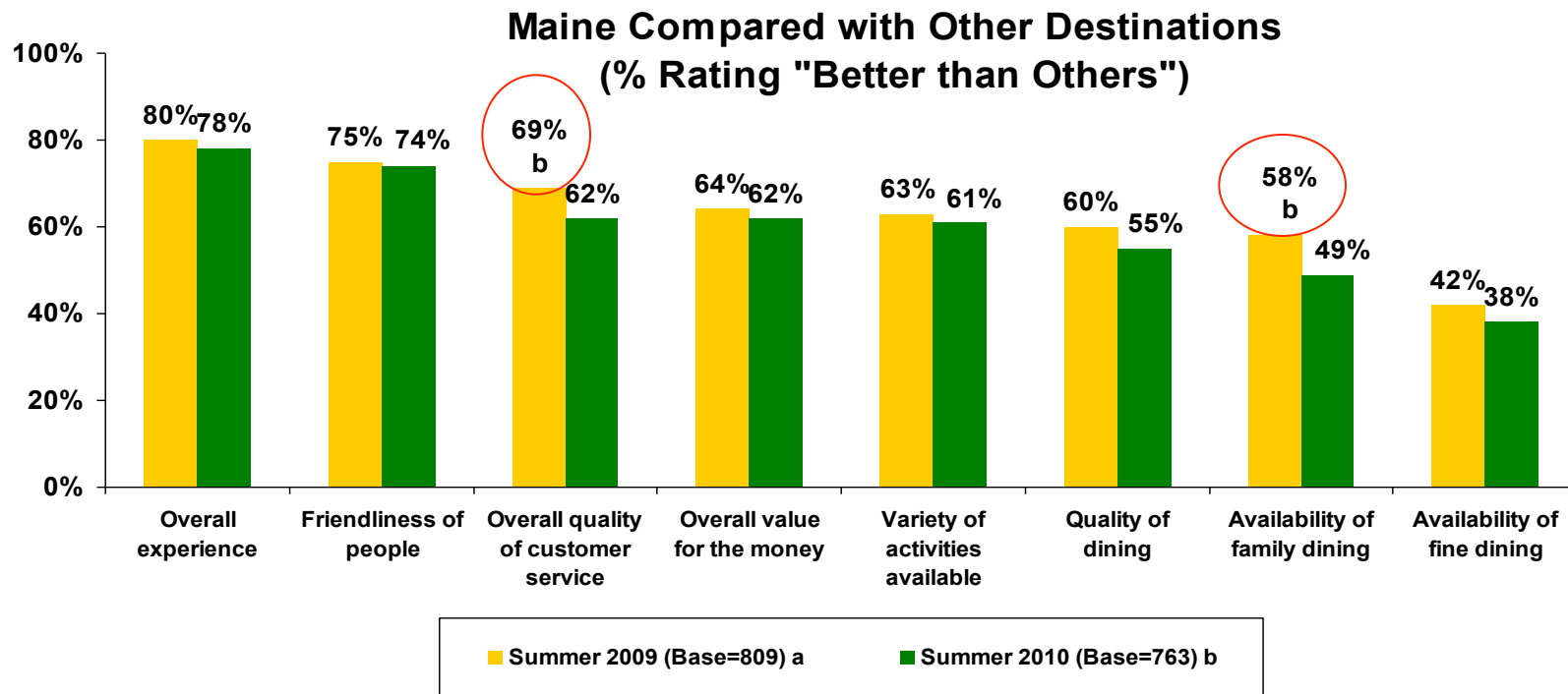
Evaluation of Maine Compared to Other Destinations – Overnight Visitors

- Perhaps as a result of the improved weather in the summer of 2010, overnight visitors were more likely to rate Maine highly for having a *variety of activities available* than they did in the summer of 2009.



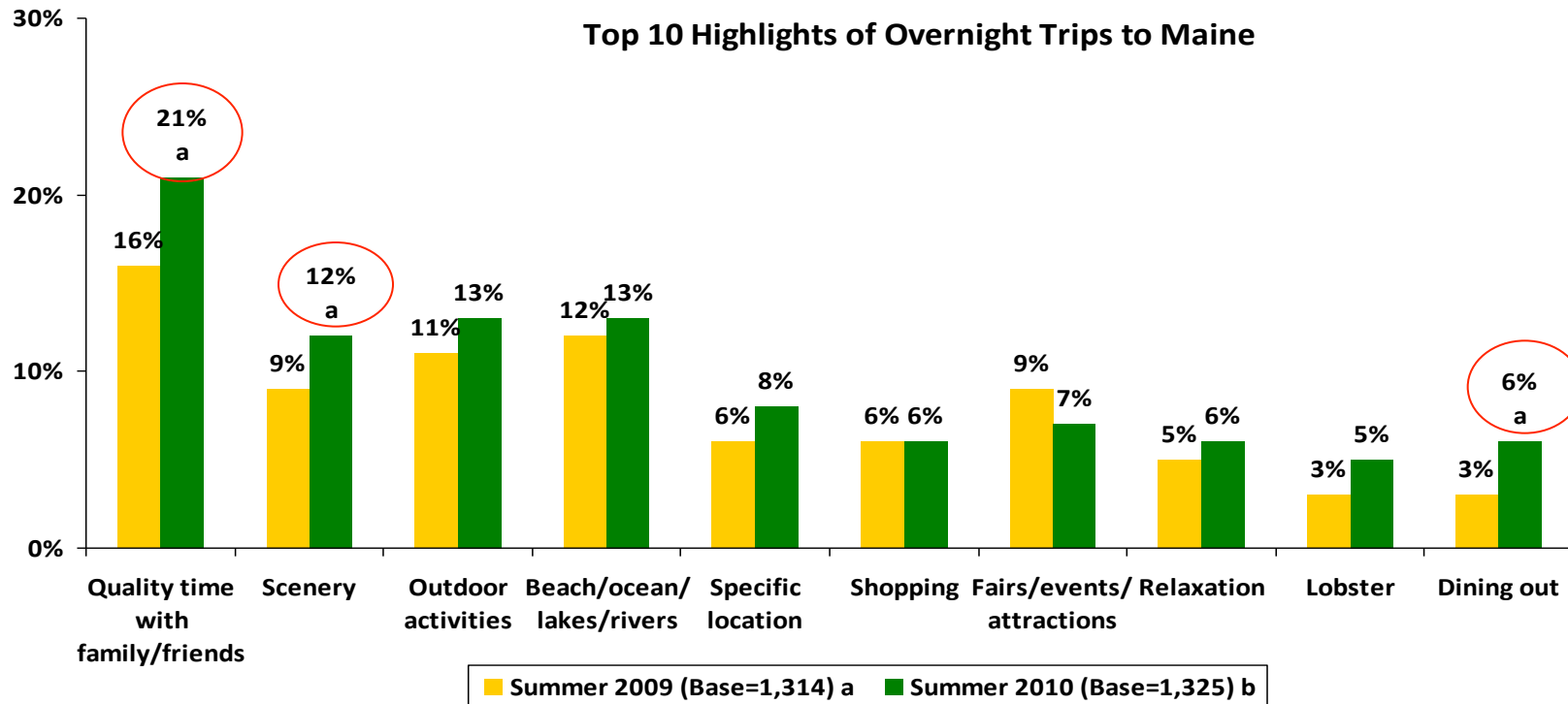
Evaluation of Maine Compared to Other Destinations – Day Visitors

- As compared to the summer of 2009, Maine was rated lower compared to other destinations in both *overall quality of customer service*, and *availability of family dining*. In both cases, this represents a return to levels seen in the summer of 2008, and may be a function of the increase in visitation putting additional strain on family dining establishments.



Highlight of Overnight Trip to Maine

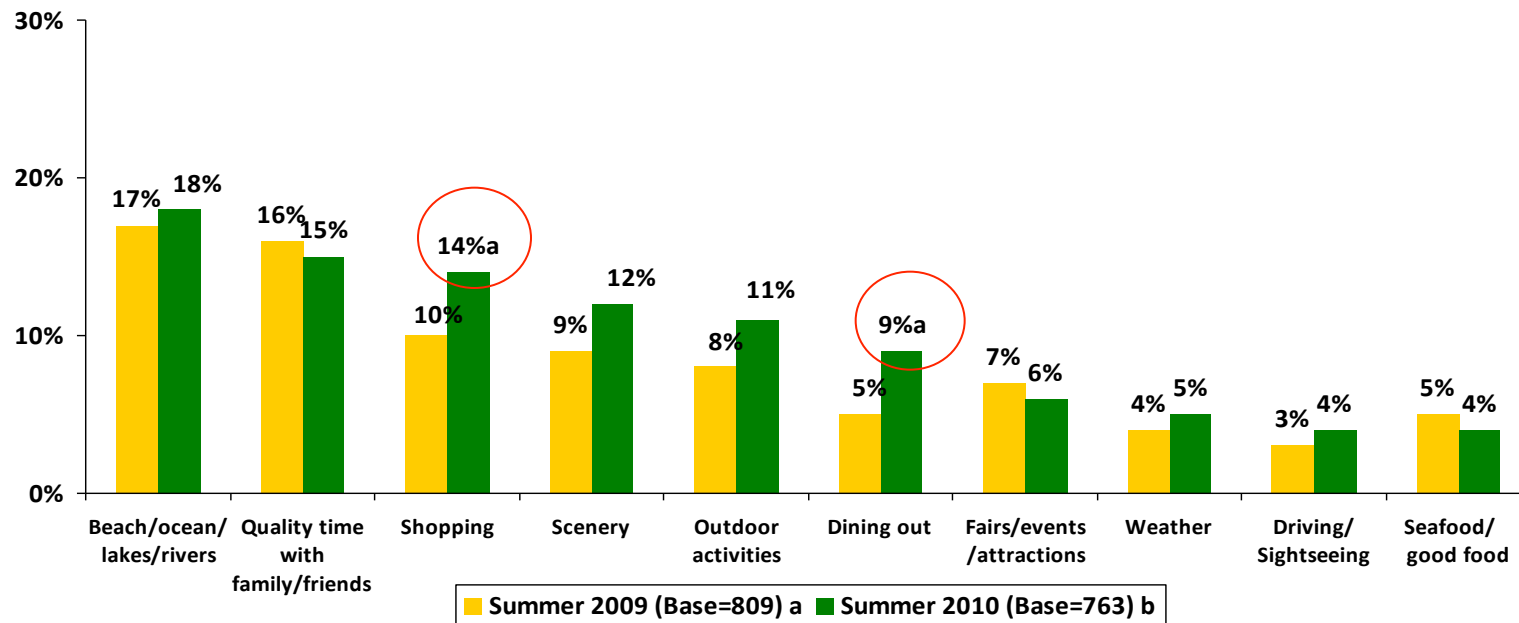
- Several items experienced year-over-year increases in the percentage of overnight visitors who reported that the item was a highlight of their trip to Maine. These included quality time spent with family and friends, scenery, and dining out.



Highlight of Day Trip to Maine

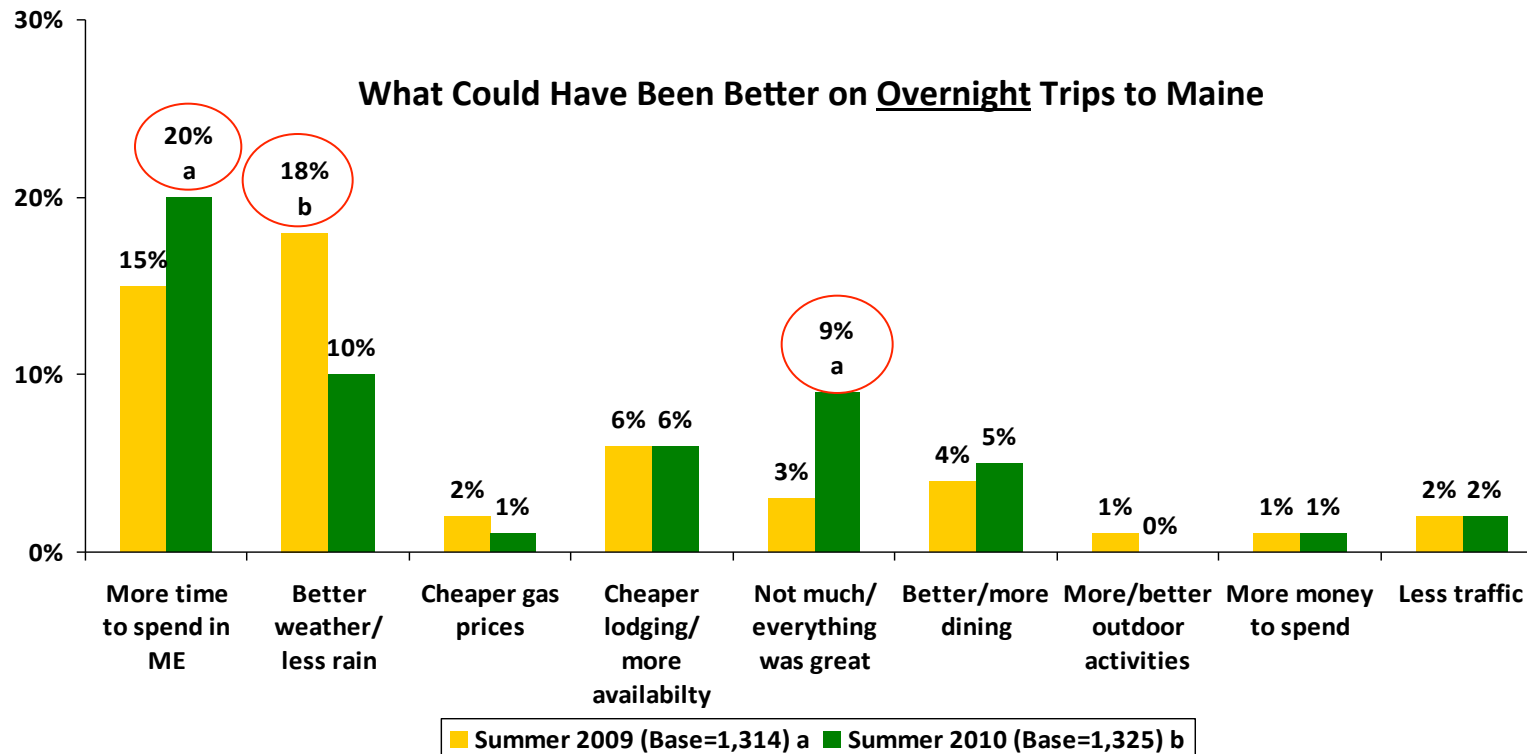
- As in 2009, the beach/ocean/lakes/rivers and spending quality time with family and friends were frequently cited highlights of summer day trips to Maine in 2010.
- However, day travelers in the summer of 2010 were more likely than those in the summer of 2009 to list shopping or dining out as the highlight of their day trip to Maine.

Top 10 Highlights of Day Trips to Maine



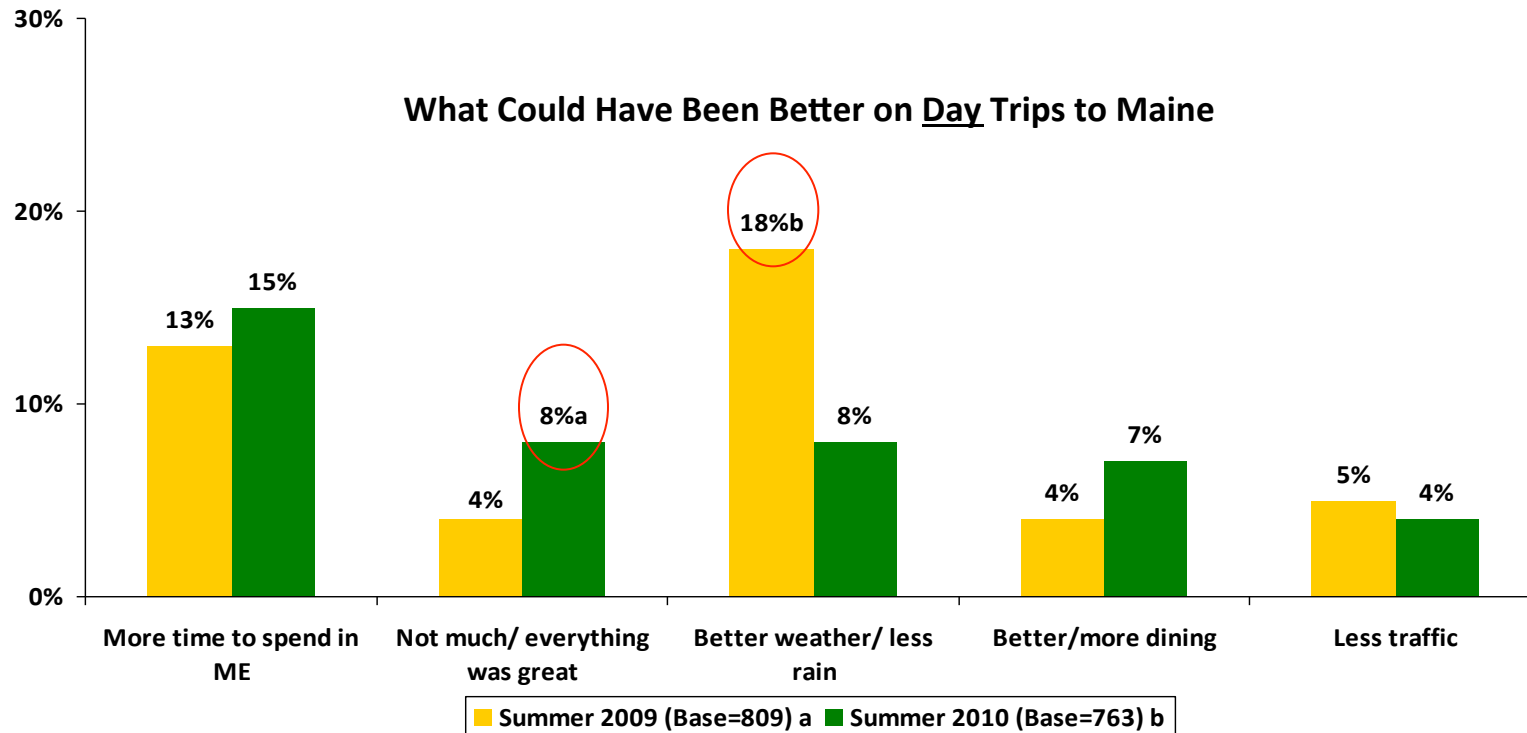
Aspects of Overnight Trips that Could Have Been Better

- Compared to the summer of 2009, there was an increase in the number of people who did not cite any specific item that could have been better with their trip. Of those who did have a complaint, there was an increase in those who wished they had more time to spend in Maine. Not surprisingly, there was a decrease in the number of complaints about the weather.



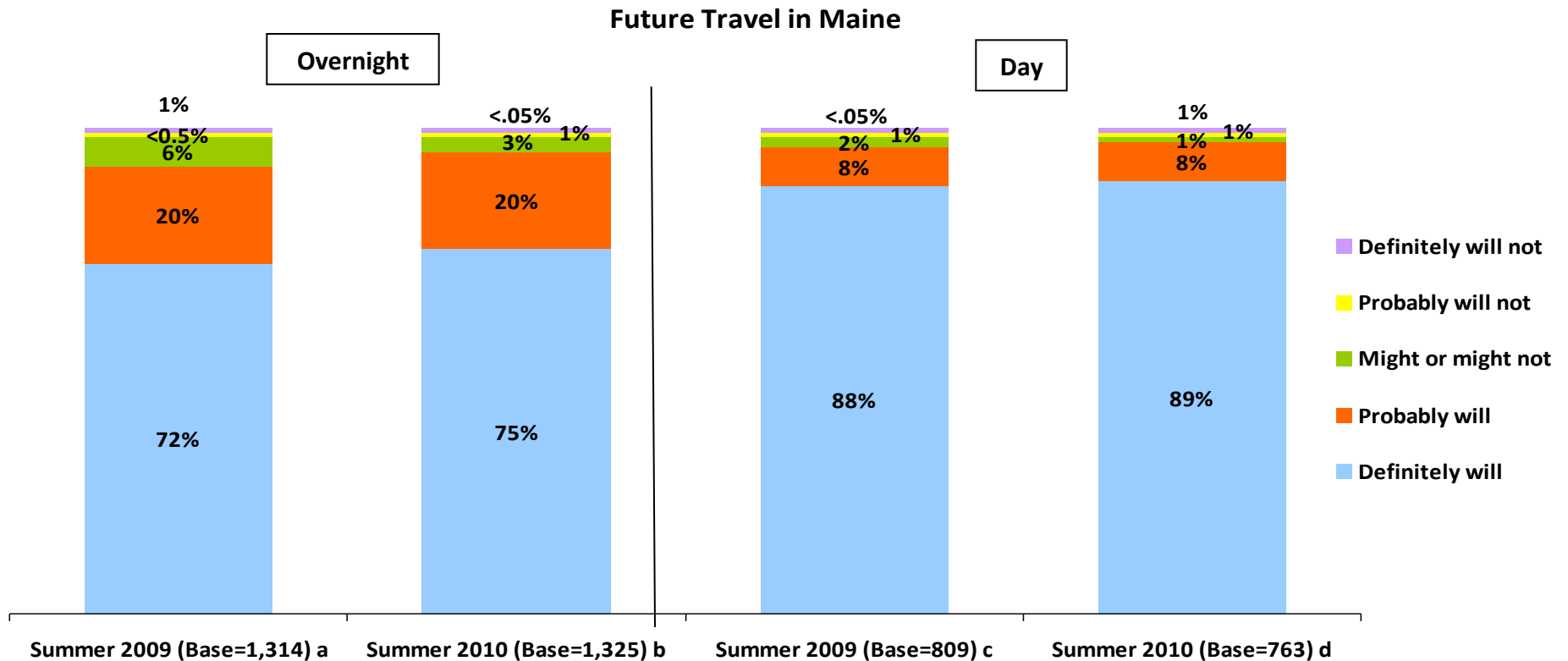
Aspects of Day Trips that Could Have Been Better

- Day visitors in the summer of 2010 were more likely than last summer to report that there are not any specific items that could have been improved on their trip. Not surprisingly, fewer 2010 visitors wished the weather had been better than those who visited during the rainy summer of 2009.



Future Travel in Maine

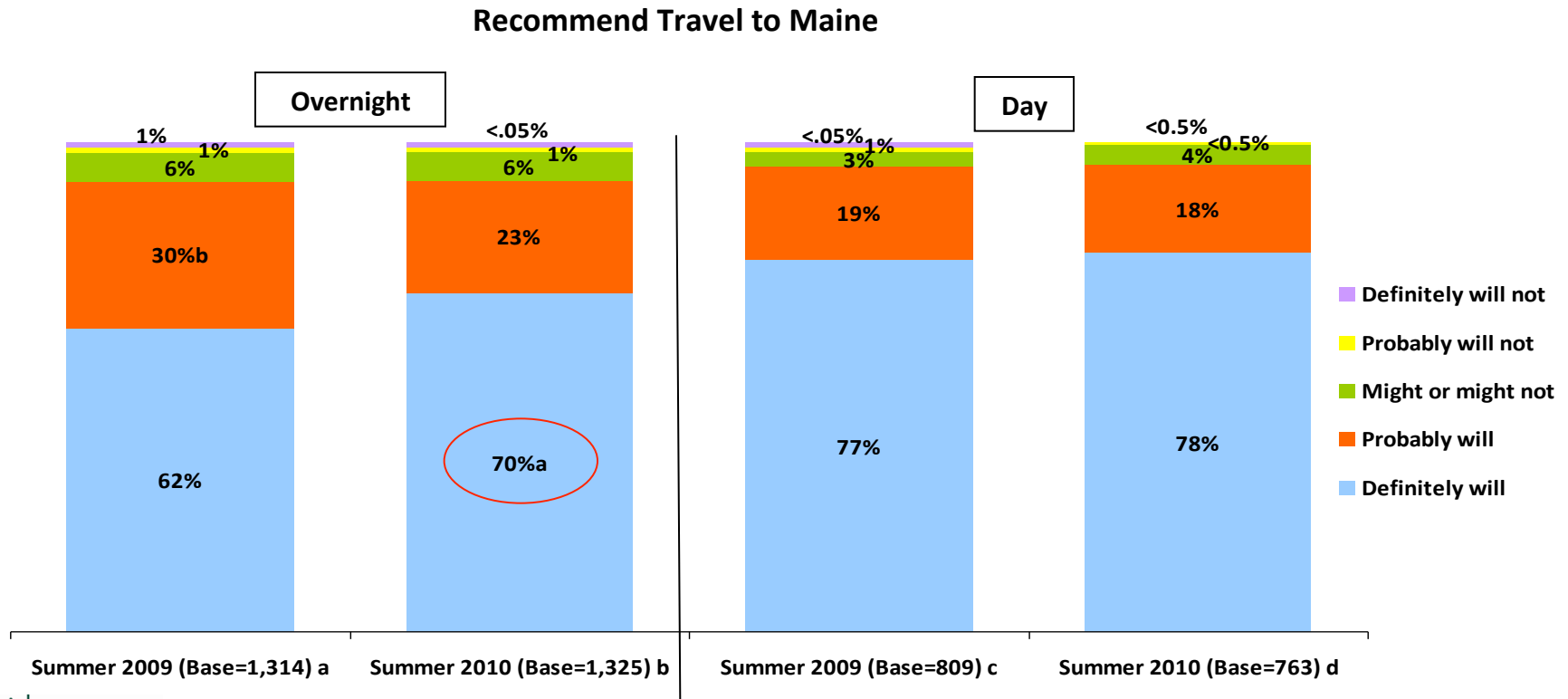
- There were no significant year-over-year differences in the likelihood that overnight or day visitors would return to Maine, as the vast majority are planning to return to Maine for a future trip.



Recommendation of Maine as a Travel Destination

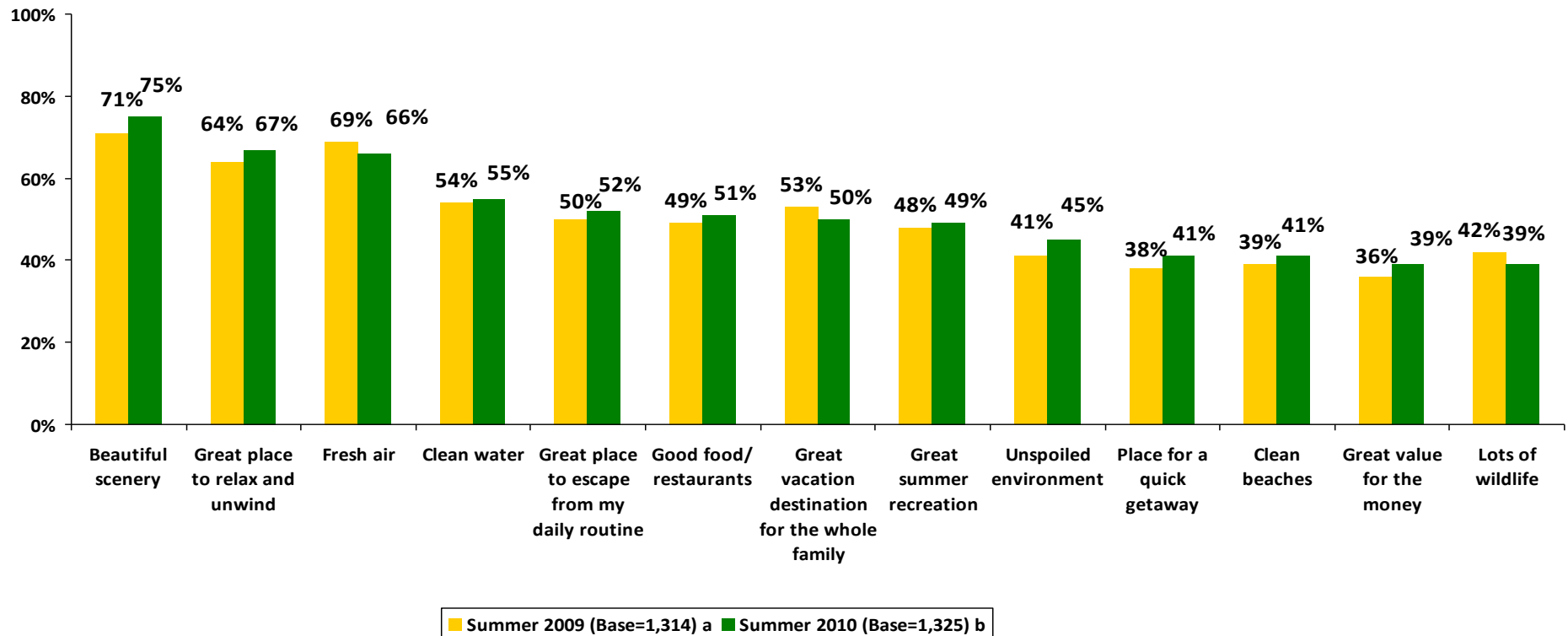
Summer 2010

- There was a significant increase among overnight visitors reporting that they *definitely will* recommend Maine as a travel destination to friends or relatives, marking a positive sign that word-of-mouth for Maine has strengthened vis-à-vis summer 2009 levels.



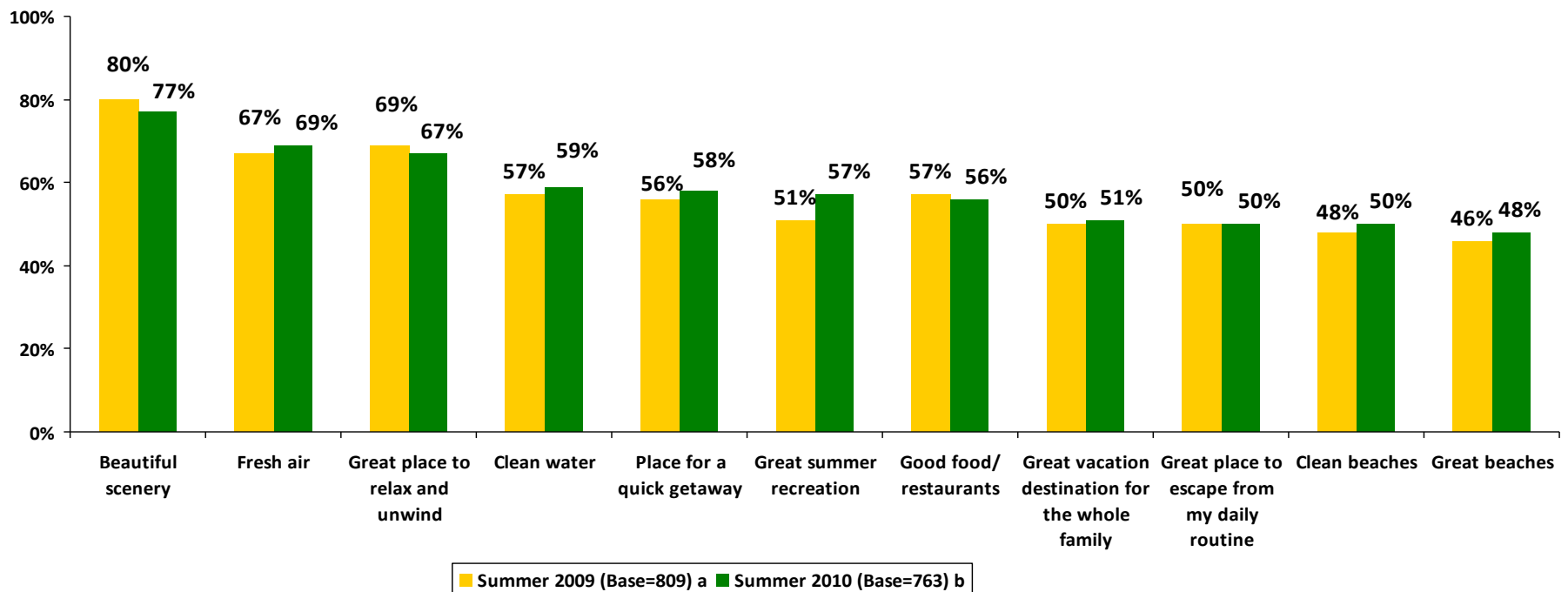
Descriptions of Maine – Overnight Visitors

- The phrases chosen as best describing Maine as a vacation destination in the summer of 2010 are consistent with the phrases selected in the summer of 2009. Maine continues to resonate with travelers as a beautiful state that is a great place to relax and unwind.



Descriptions of Maine – Day Visitors

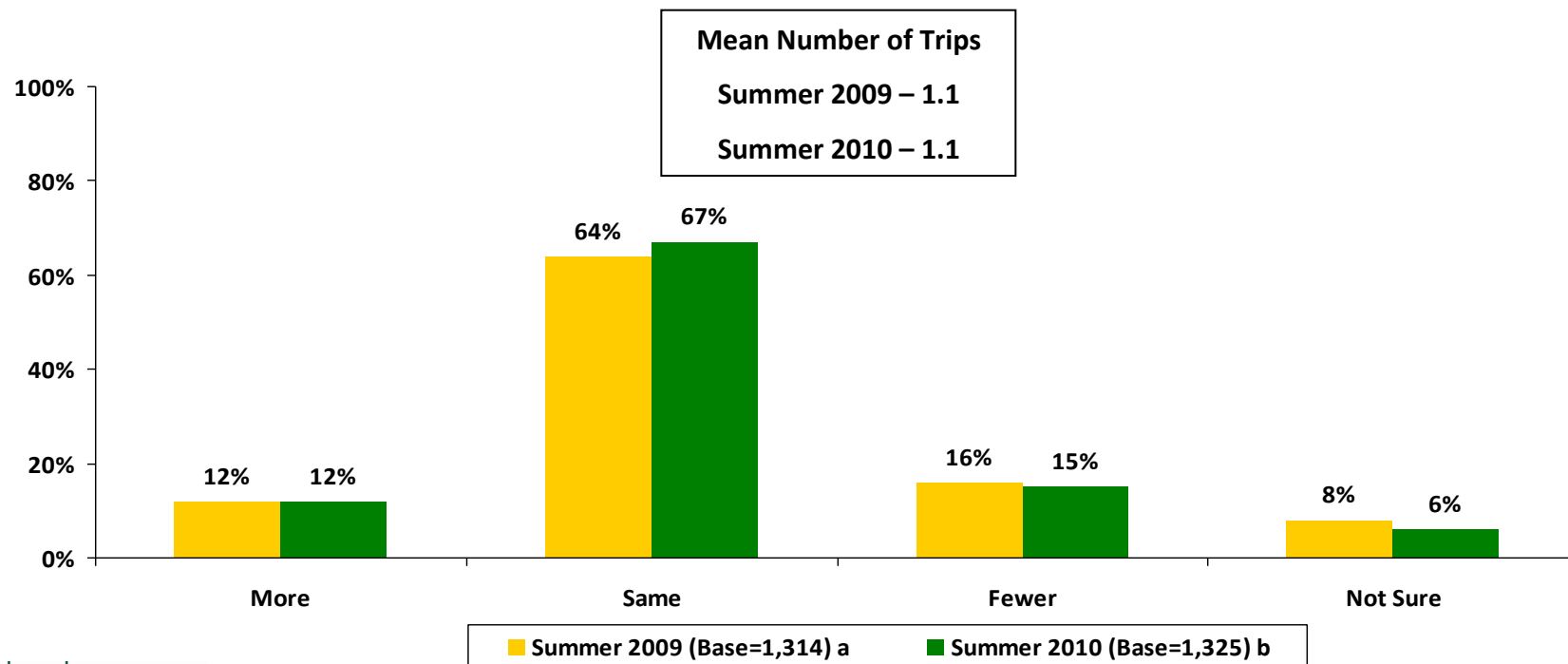
- As with overnight visitors, there were no significant changes in the phrases chosen as best describing Maine as a vacation destination in the summer of 2010. Visitors continue to view Maine as a beautiful place to relax and unwind.



Future Overnight Leisure Travel Intentions

- Future travel intentions are consistent with levels seen a year ago.

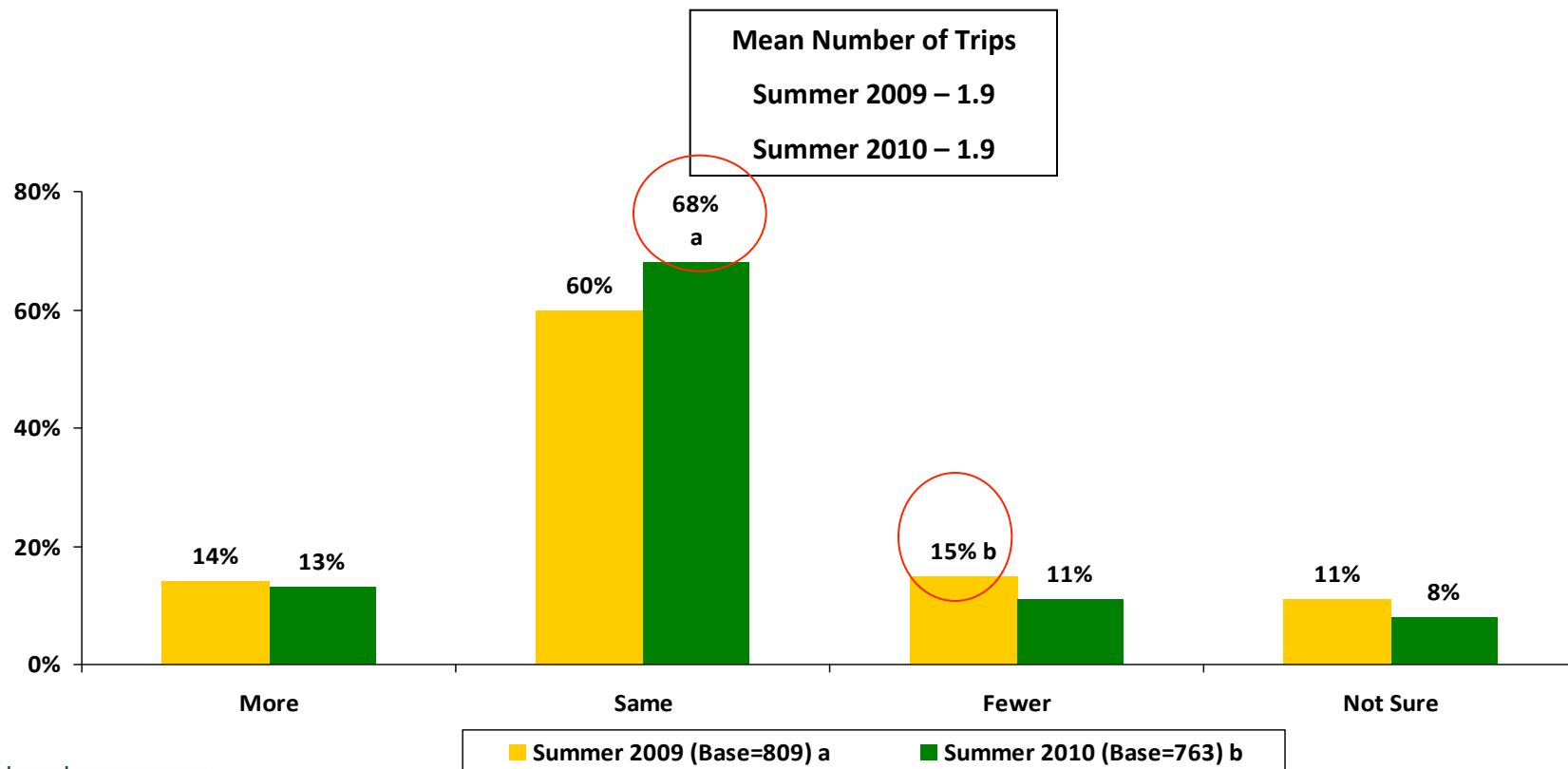
Planned Leisure Trips in Next Month



Future Day Leisure Travel Intentions

- While the mean number of intended future trips is equivalent to a year ago, we are seeing a directional decline in the number intending to reduce their trips, and an increase in those keeping their trip planning stable. This suggests that cutbacks in travel due to the economy may be waning.

Planned Leisure Trips in Next Month



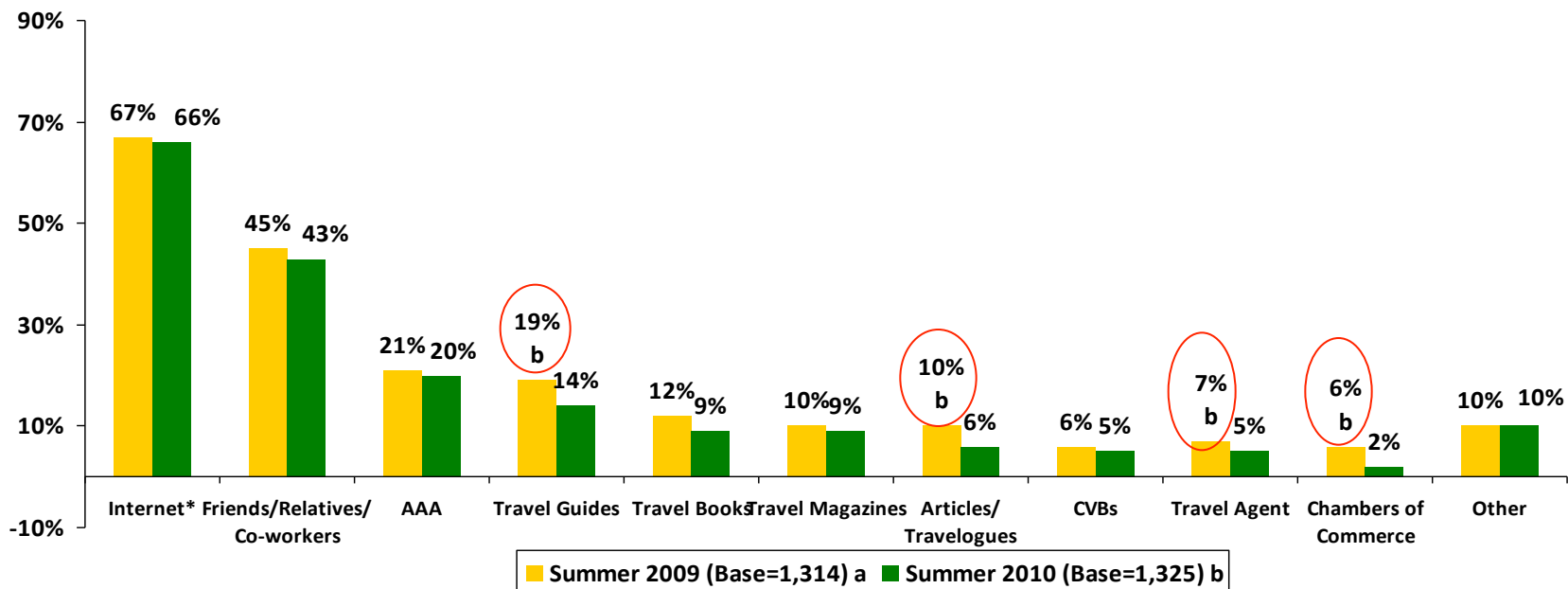
Maine Overnight Visitor Summer Trip Planning



Travel Planning Sources

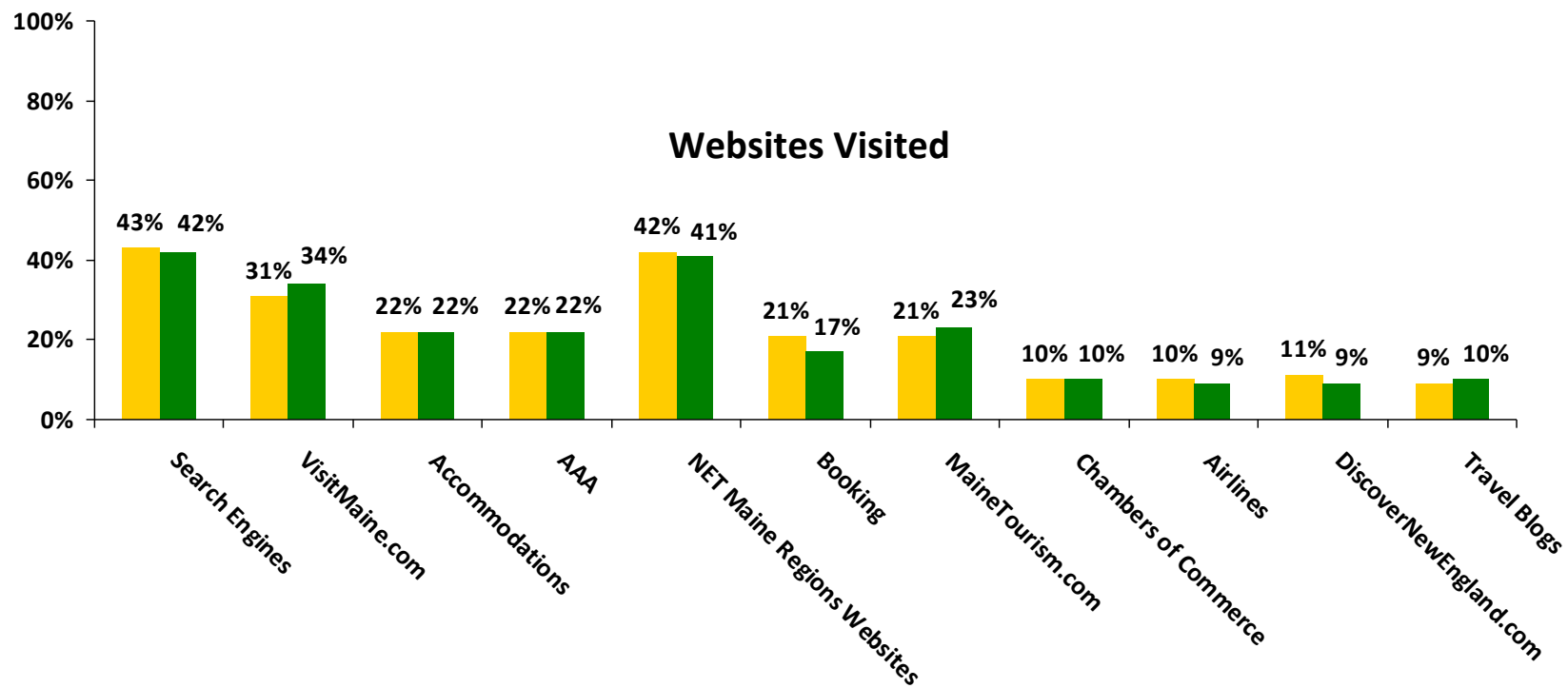
- Overnight visitors' travel planning sources for their trip to Maine remained stable between summer 2009 and summer 2010.
- This summer did see a noticeable decline in travelers using Travel Guides, Articles/travelogues, Travel Agents and Chambers of Commerce in their trip planning.

Travel Planning Sources



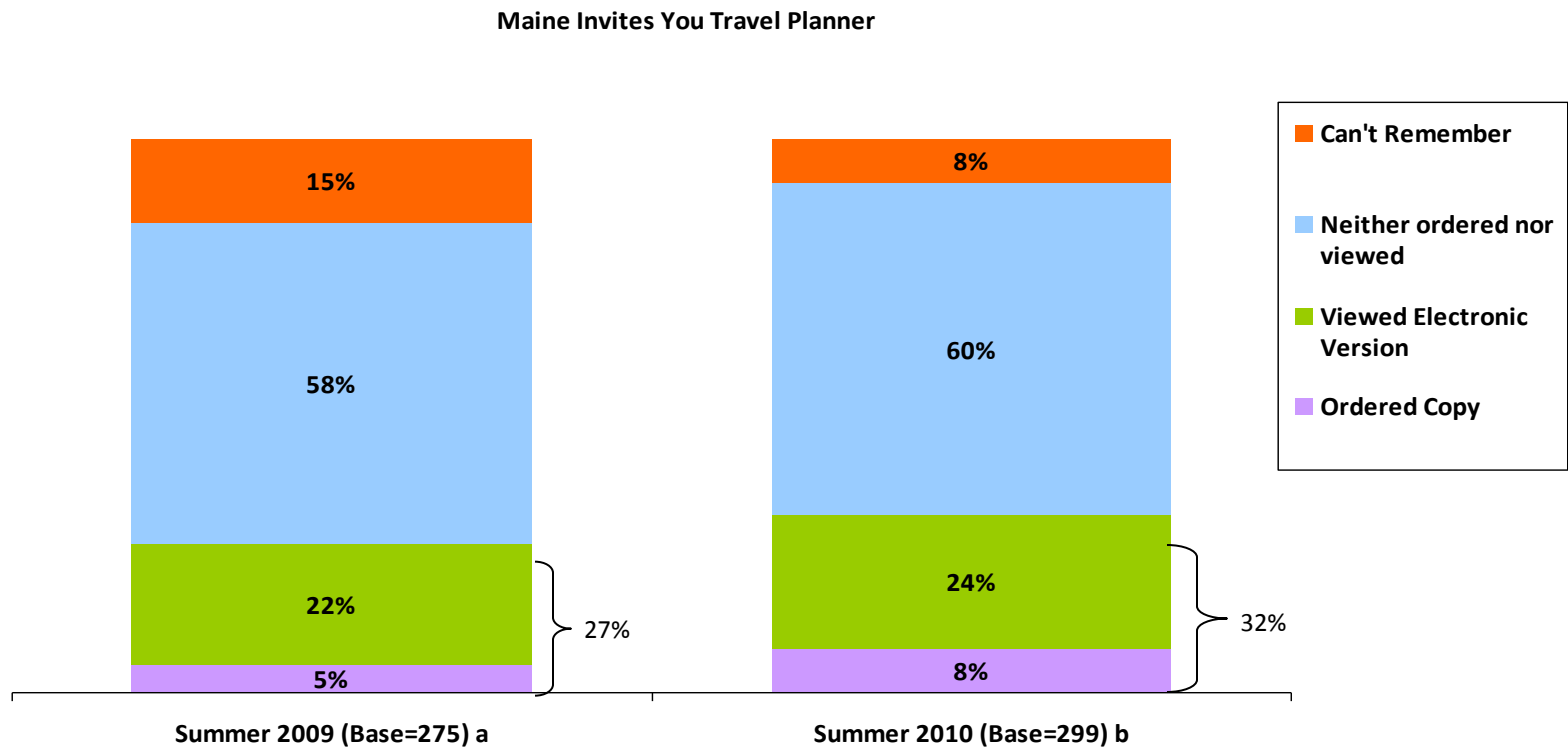
Online Travel Planning

- Online travel planning for the summer of 2010 is consistent with online travel planning for the summer of 2009.



Maine Invites You Travel Planner

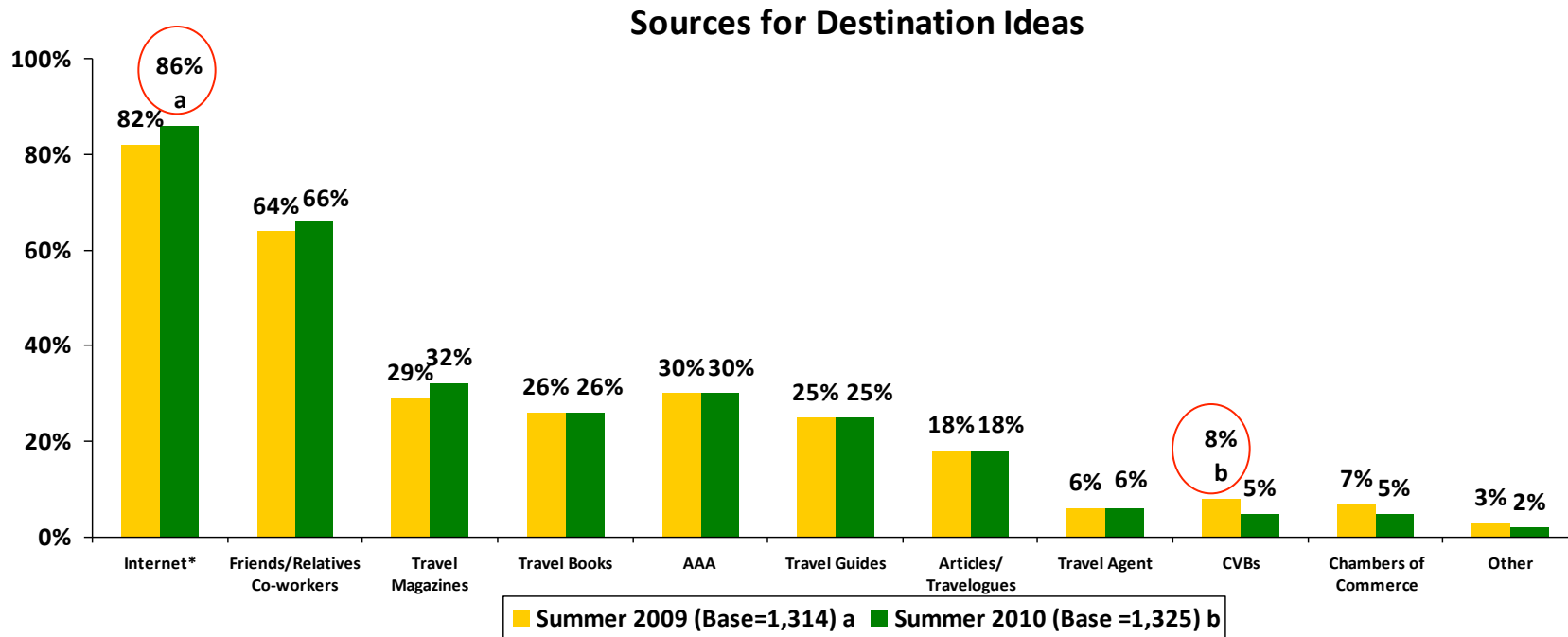
- There were no significant year-over-year shifts in the percentage of overnight visitors who visited VisitMaine.com and viewed or requested a copy of the *Maine Invites You* travel planner.



General Travel Planning Sources – Initial Ideas for Destinations

Summer 2010

- The Internet, as well as friends and relatives, remain the most used sources of initial destination ideas for leisure trips, with the Internet showing an increase over the summer of 2009.
- Travelers were less likely to contact local CVBs to get ideas for places to visit.

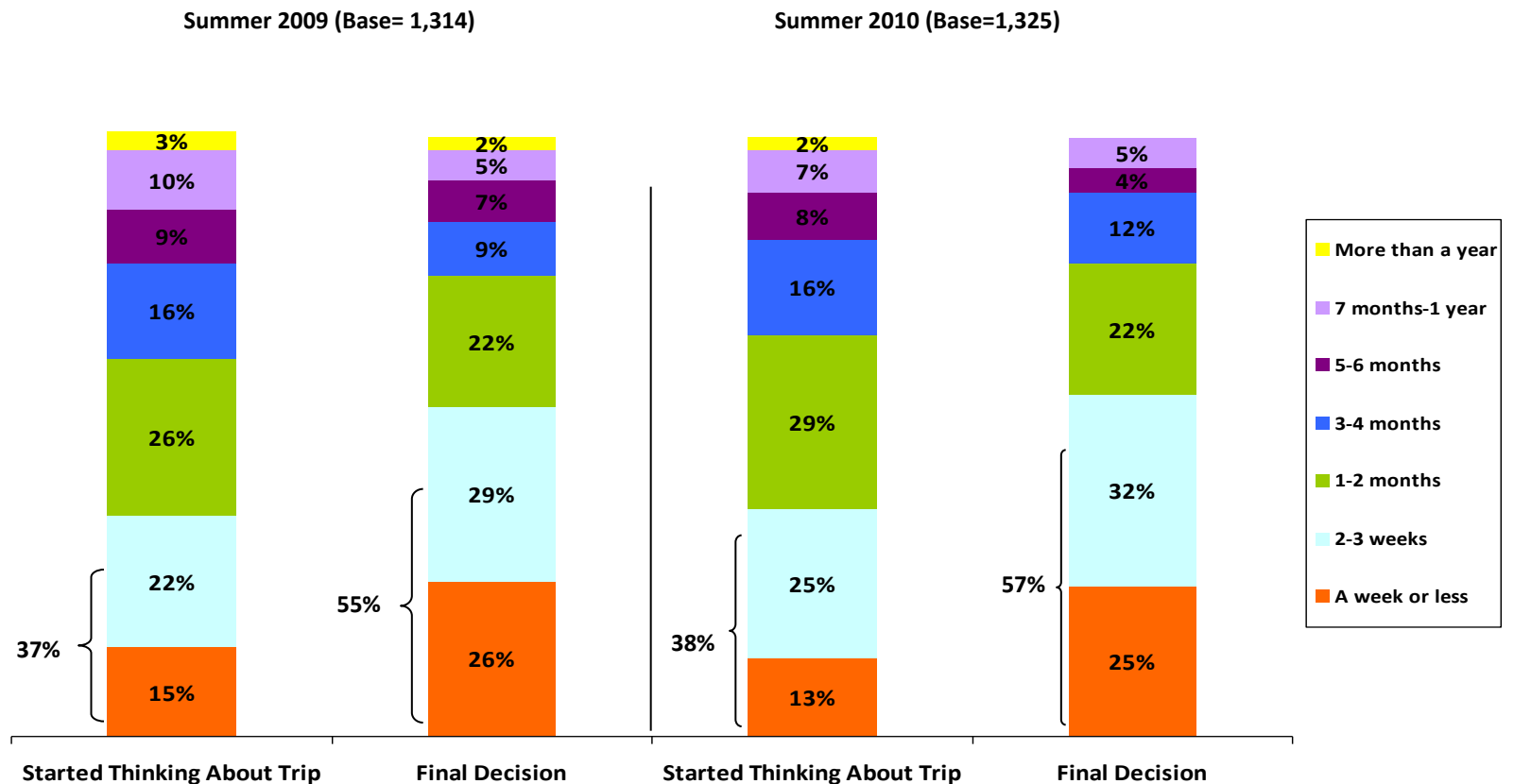


Planning Time Frame

Summer 2010

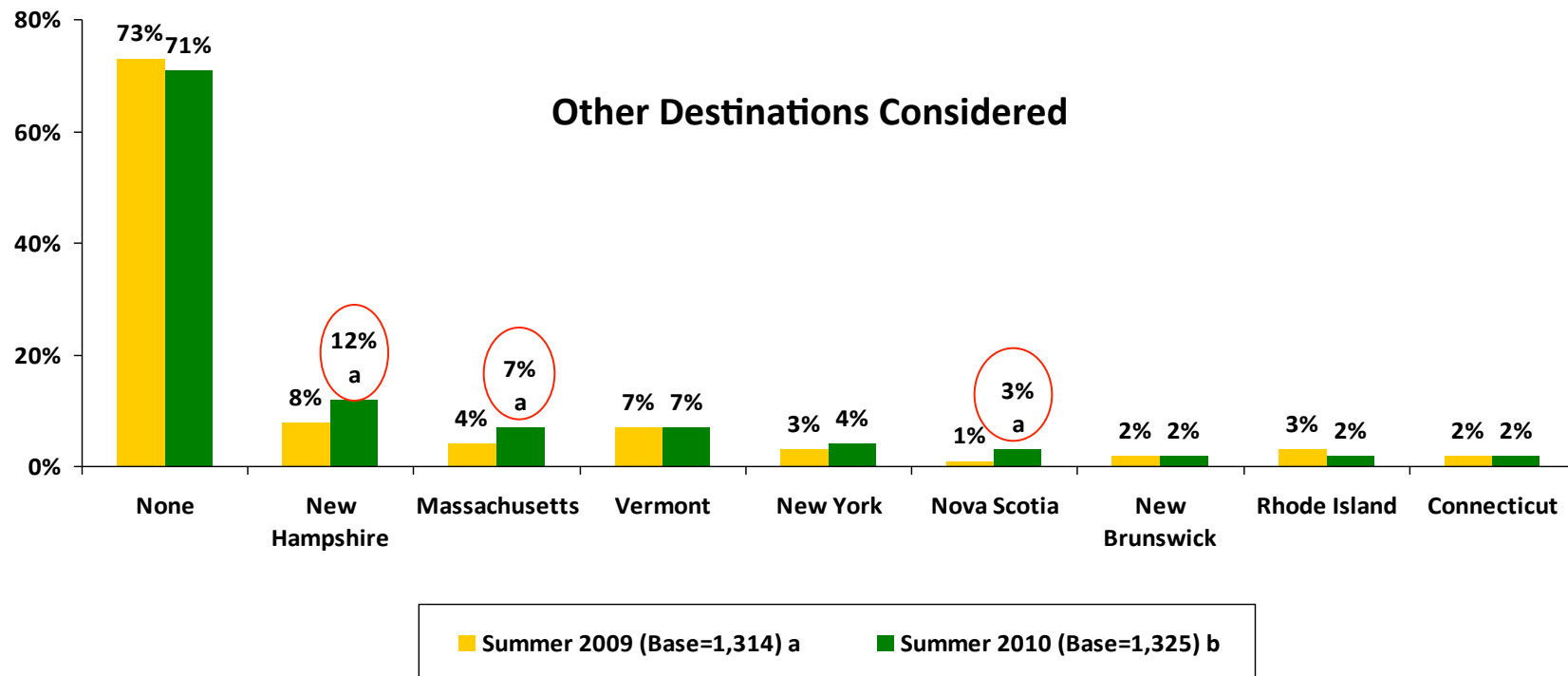
- Travelers continue to operate on a relatively short time frame, with more than half making the final decision to travel within three weeks of taking their trip to Maine.

Decision Making Time Frame



Other Destinations Considered

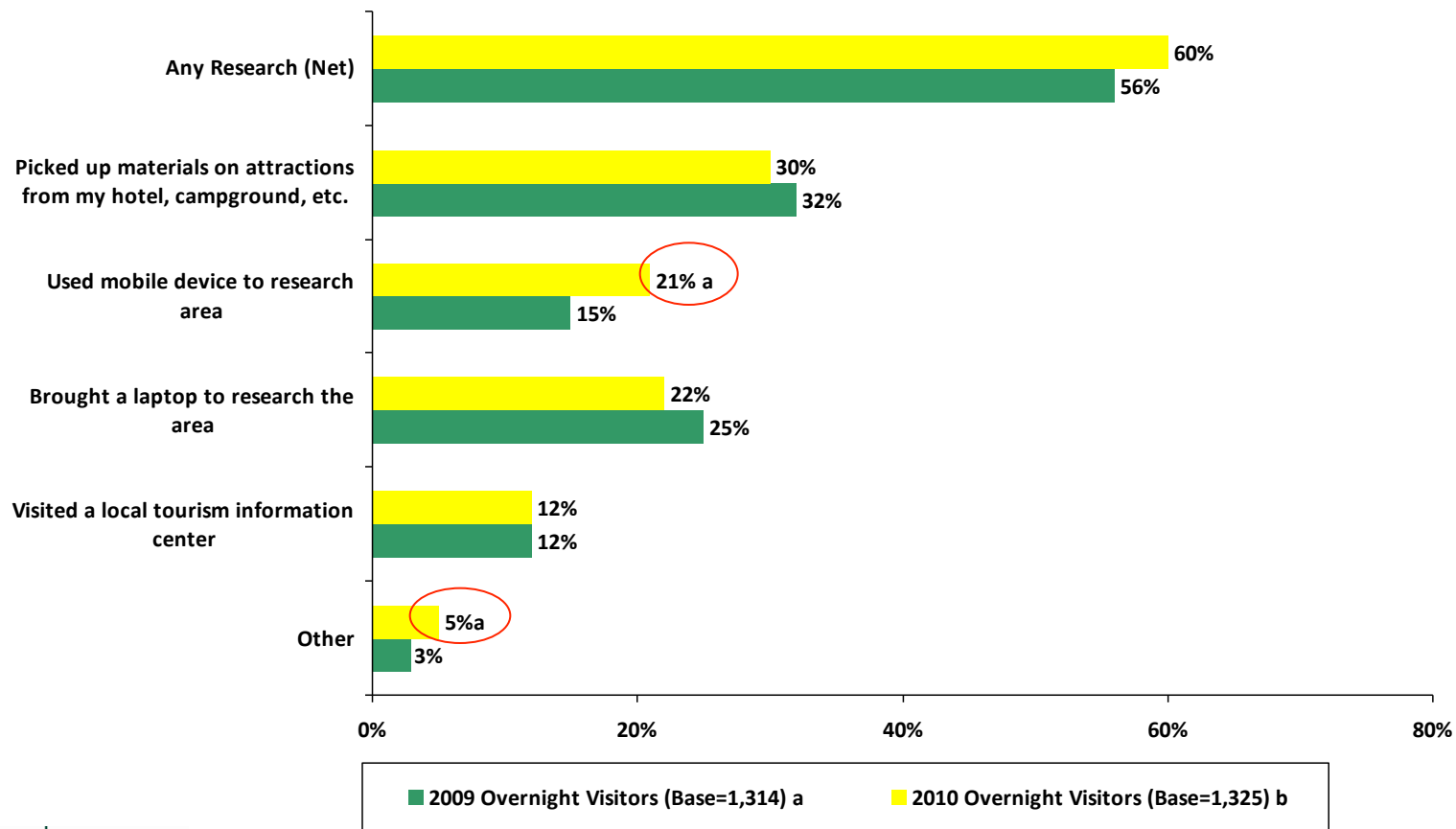
- For the vast majority of travelers to Maine, no other destinations were considered when planning their trip.
- There were increases over Summer 2009 in Maine visitors who also considered New Hampshire, Massachusetts, and Nova Scotia although these are small minorities compared to those who consider only Maine.



Research While In Maine – Overnight Visitors

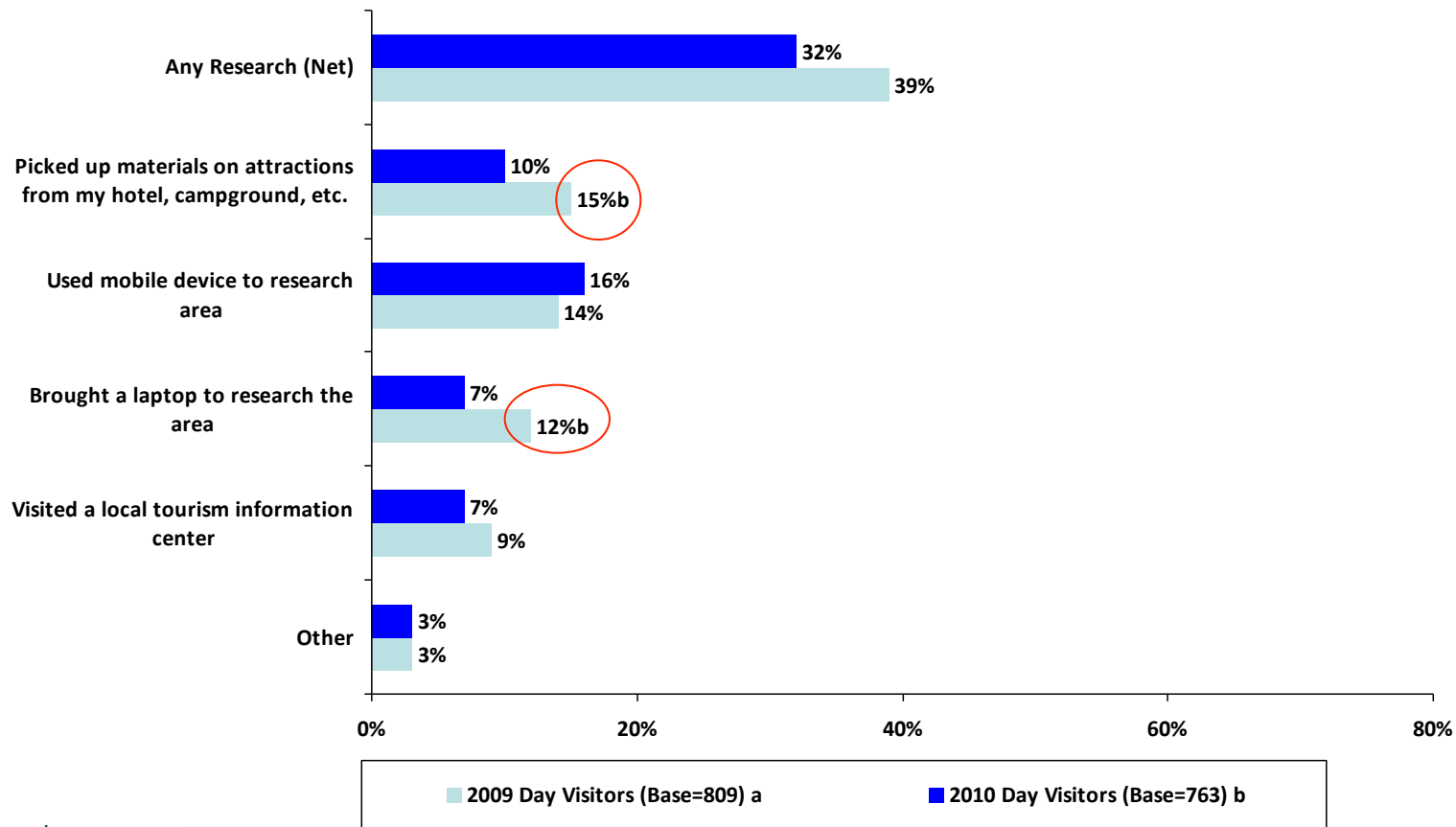
Summer 2010

- As with the summer of 2009, more than half of overnight visitors during the summer of 2010 researched places to go and things to do in Maine while they were on their trip.
- The summer of 2010 saw an increase in the number of visitors who used a mobile device to research the area during their trip to Maine.



Research While In Maine

- Similar to the summer of 2009, about one in three day visitors during the summer of 2010 researched places to go and things to do in Maine while they were on their trip.
- The summer of 2010 saw a decrease in the number of day visitors who picked up travel materials or brought along a laptop to conduct this research.



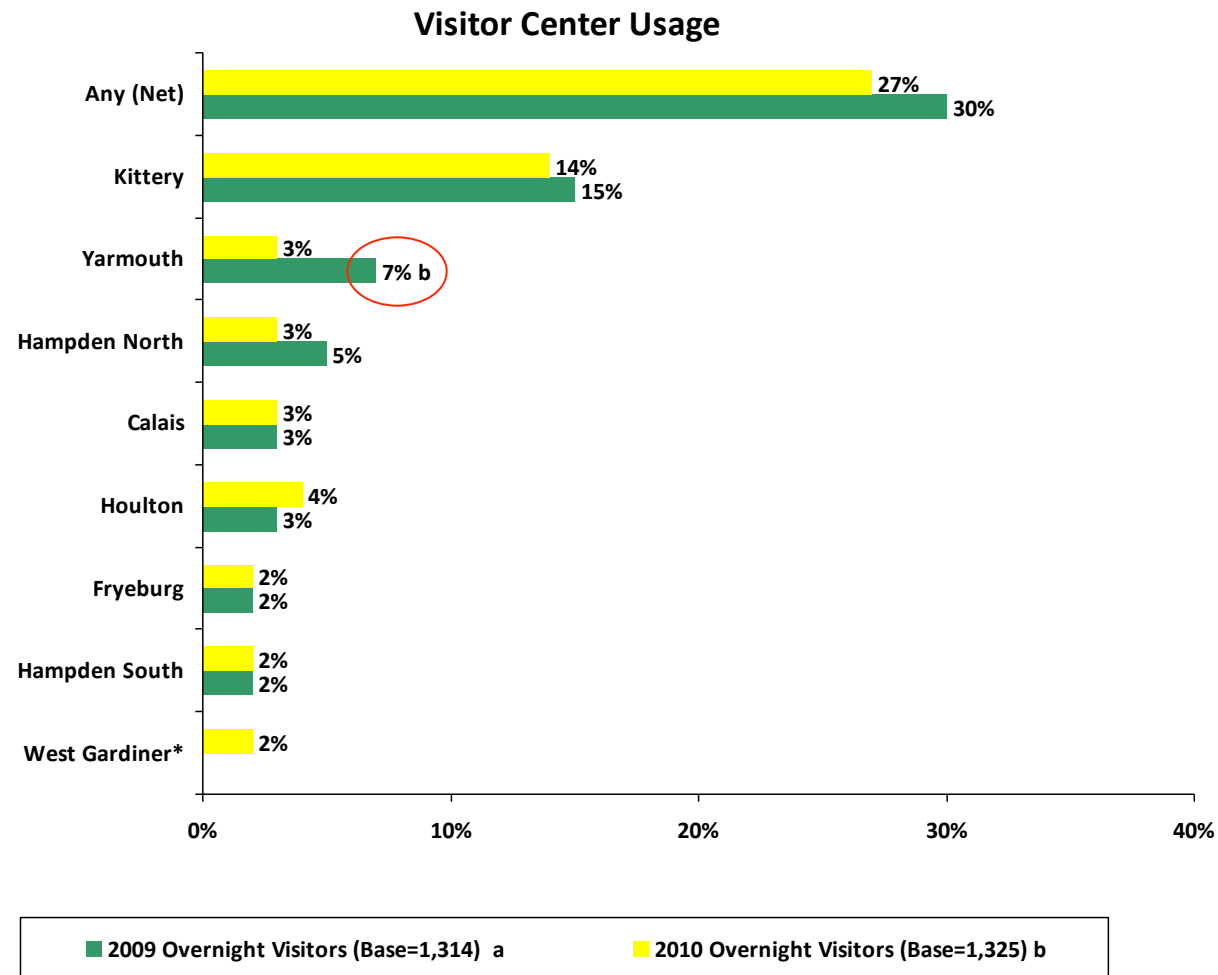
Visitor Centers and Social Networking



Maine Visitor Center Usage – Overnight Visitors

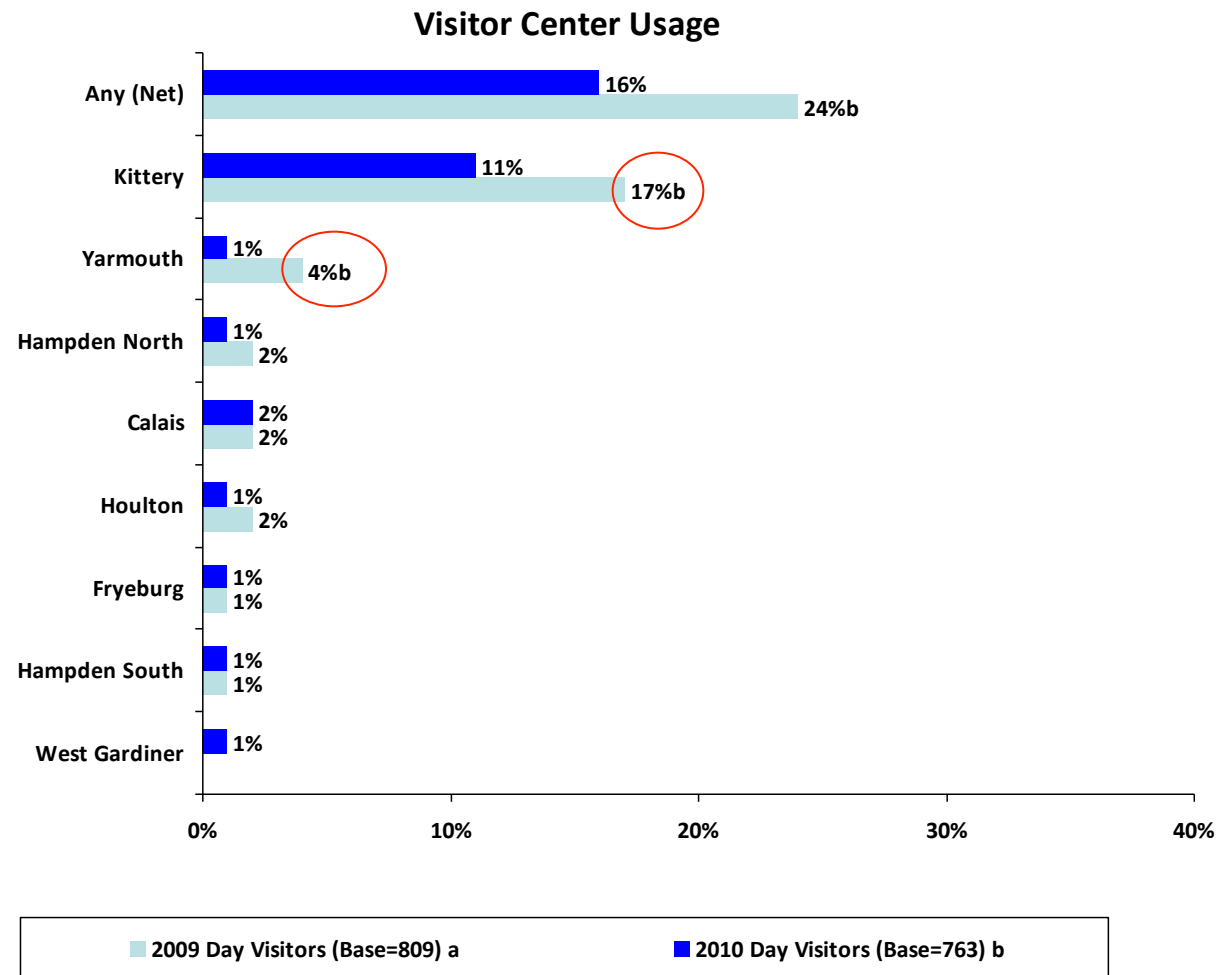
Summer 2010

- Nearly one-third of overnight visitors report that they went to a Maine Visitor Center during their recent trip to Maine.
- The Yarmouth Visitor Center saw a decrease in visitation during the summer of 2010 compared to the summer of 2009.



Maine Visitor Center Usage – Day Visitors

- Visitor Center usage declined from the Summer of 2009 among day visitors, driven largely by reductions in visitation to the Kittery and Yarmouth Visitor Centers.

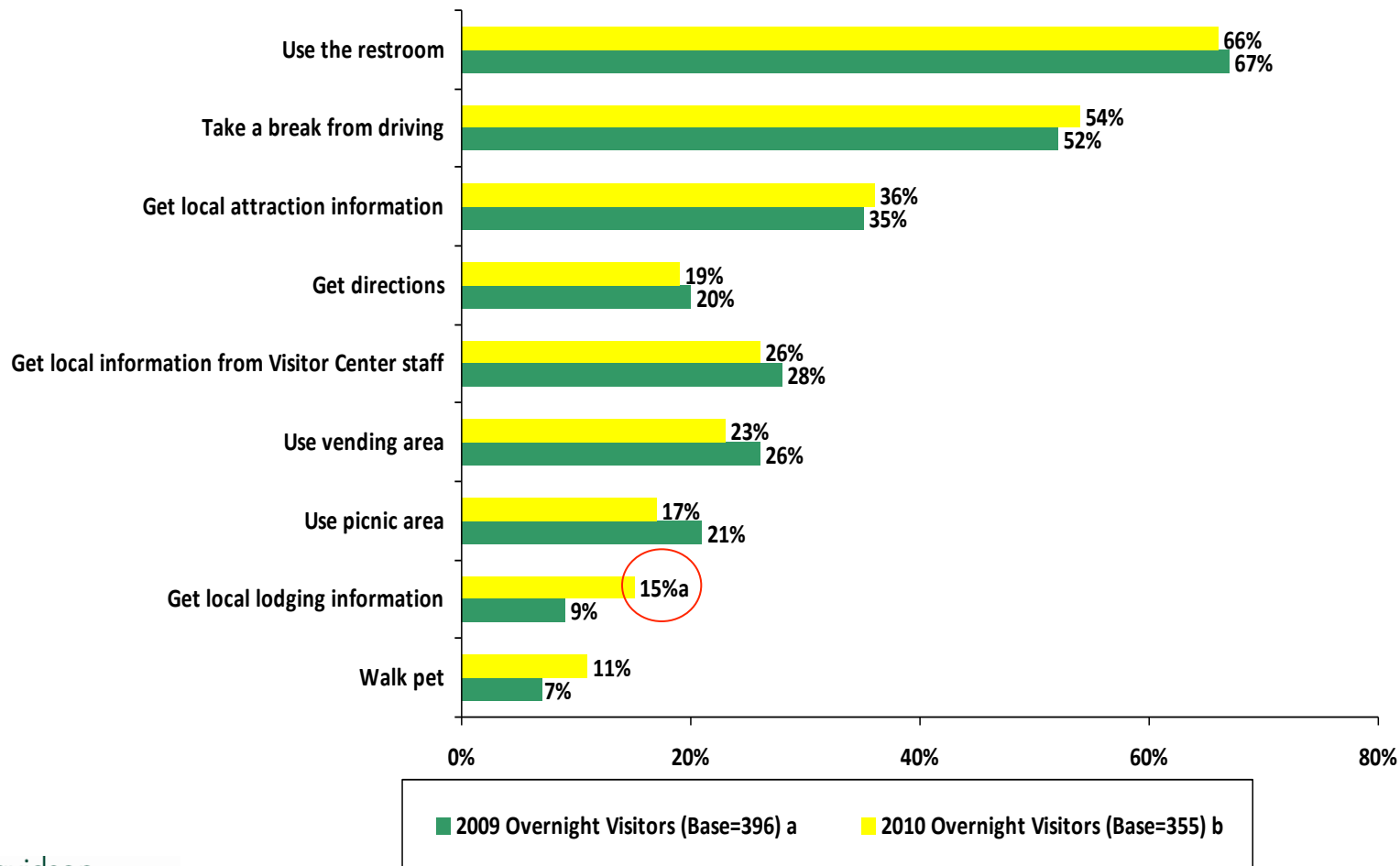


Maine Visitor Center Usage – Overnight Visitors

Summer 2010

- The top activity among overnight visitors who went to a Maine Visitor Center was using the restrooms, followed by taking a break from driving.
- During the summer of 2010 visitor centers saw an increase in visitors picking up local lodging information compared to the summer of 2009.

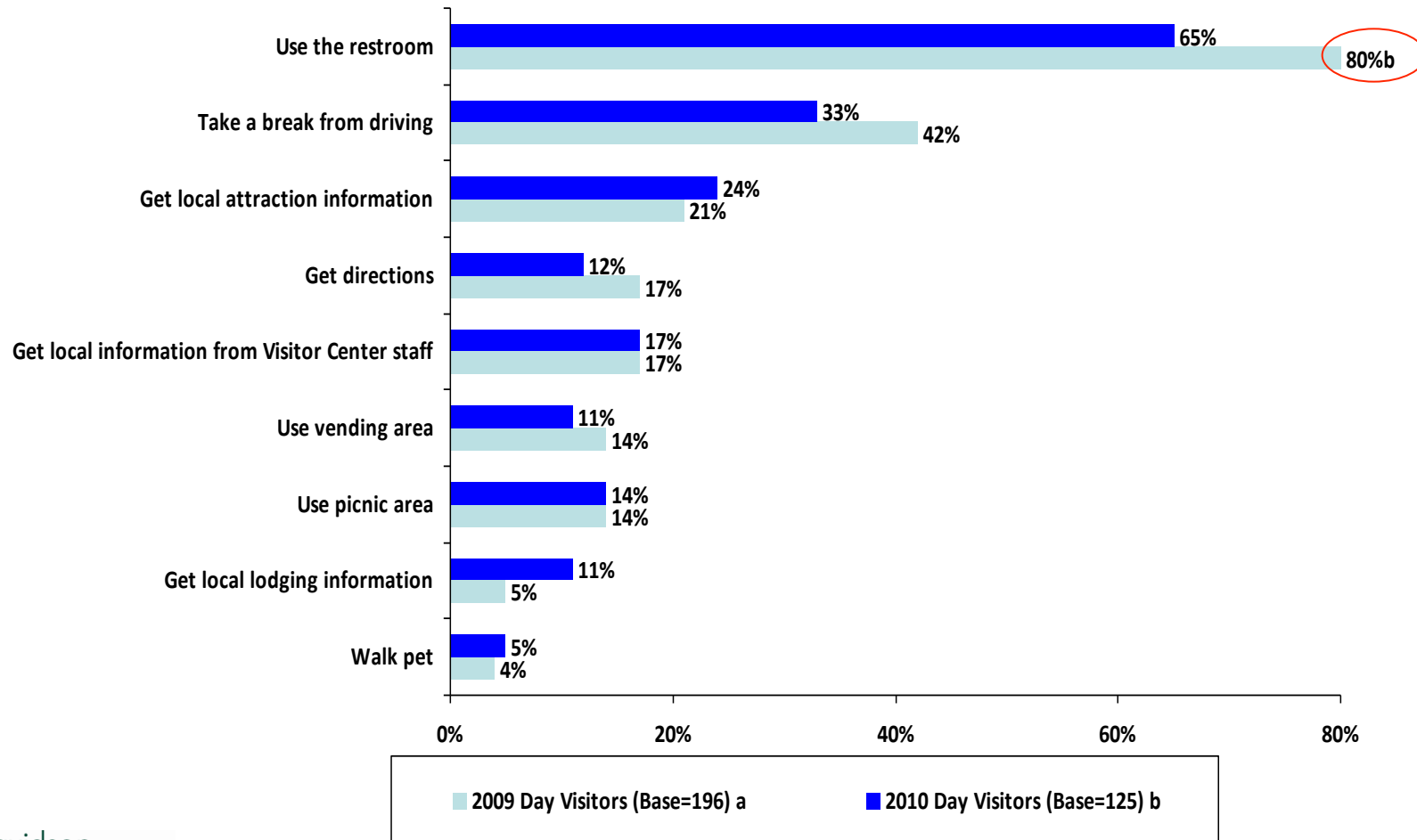
Visitor Center Usage



Maine Visitor Center Usage – Day Visitors

- Compared to the summer of 2009, day visitors in the summer of 2010 were less likely to stop at Maine Visitor Centers to use the restroom, although that continued to be the most popular activity.

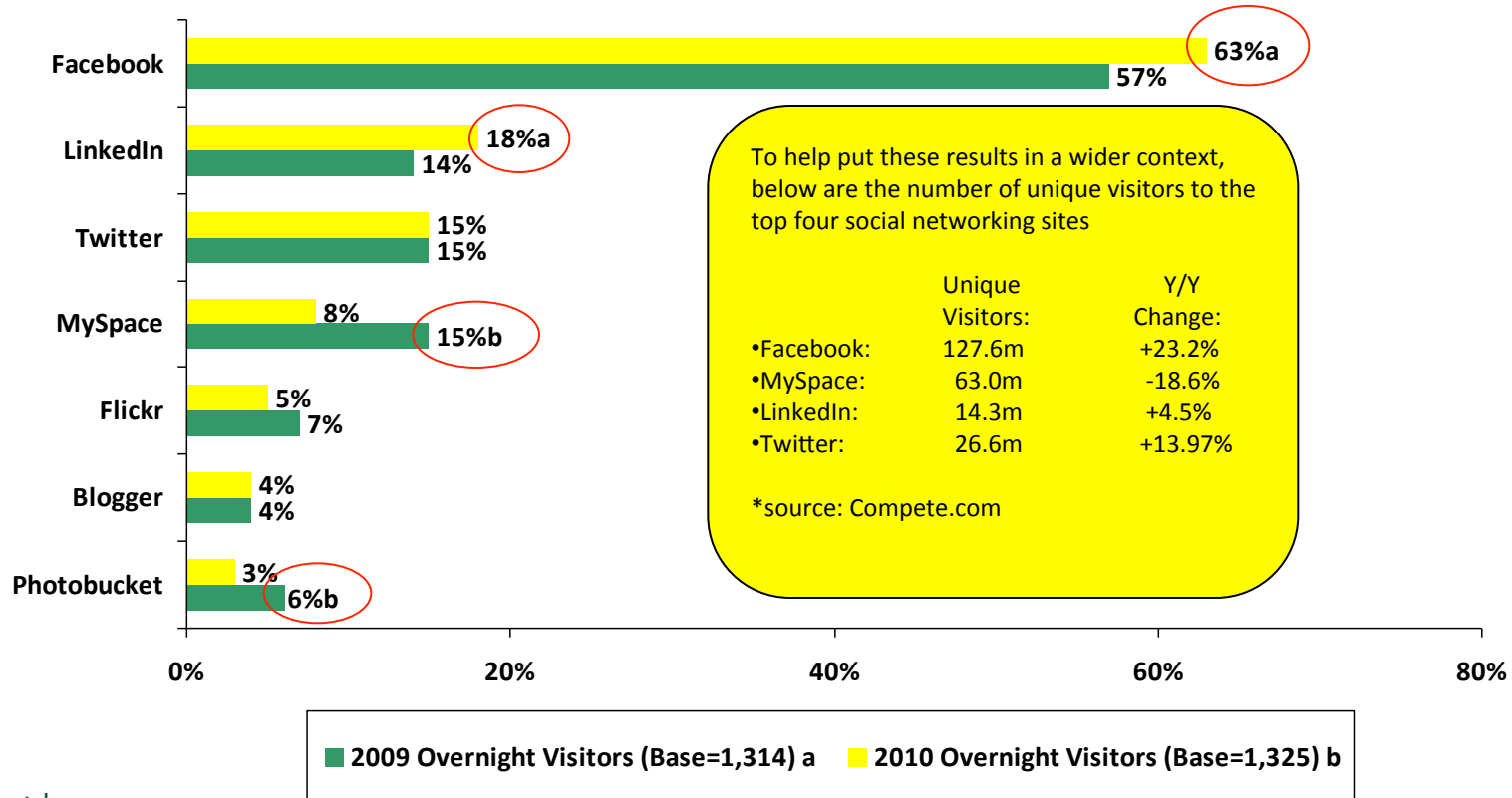
Visitor Center Usage



Social Networking Site Usage – Overnight Visitors

- Nearly two-thirds of overnight visitors to Maine in the summer of 2010 report that they use Facebook, an increase over the summer of 2009. LinkedIn usage is also up over the Summer of 2009.
- Usage of MySpace and Photobucket is less prevalent among visitors during this time.

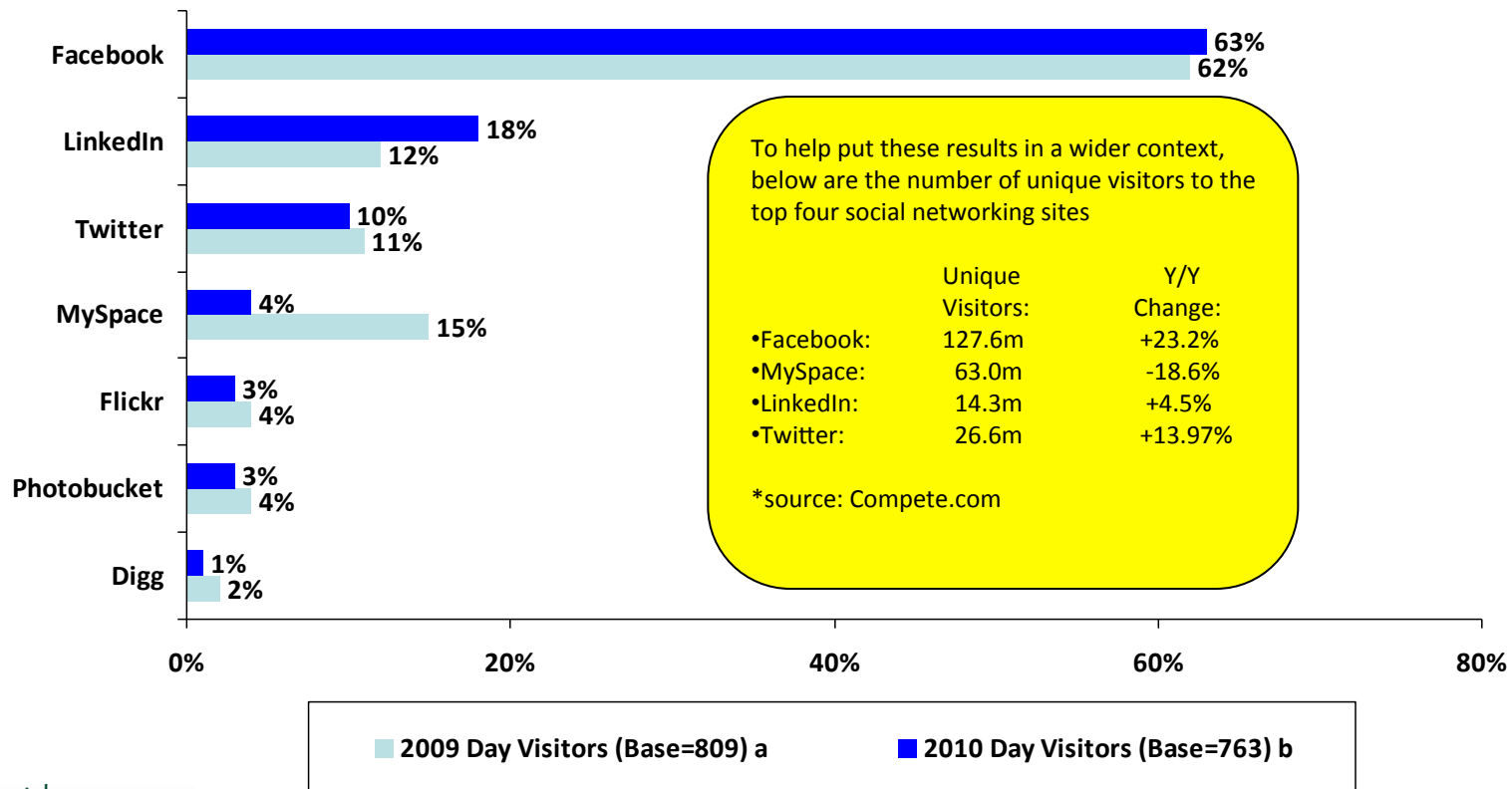
Social Networking Sites Used on a Regular Basis



Social Networking Site Usage – Day Visitors

- More than one half of day visitors report that they use Facebook, the most frequented social networking site.
- Usage of MySpace among Maine day visitors also declined compared to a year ago.

Social Networking Sites Used on a Regular Basis



Conclusions



Conclusions

- **Travel is slowly beginning to rebound in the United States, but still faces a great deal of uncertainty.** The National Omnibus survey used for this study points to the fact that overall travel in the U.S. is up slightly in 2010 over a year ago, a conclusion that is supported by national occupancy statistics. However, due to ongoing economic issues, high unemployment rates, and continuing low Consumer Confidence, American consumers are still treading cautiously and are showing hesitation to spend money. But, combined with pent up demand, especially among those with job security, we see mixed signals for the travel industry going forward.
- **Maine has been successful in maintaining its market share.** Maine experienced a directional increase in the percent of VFR travelers who visited Maine in the summer of 2010 compared with the summer of 2009 while maintaining its share of business and leisure travelers. This is likely due in part to the improved weather experienced in the state compared to the summer of 2009 as more families decided to take advantage of the weather to enjoy Maine's beauty.

The increase in overall travel in the U.S. , as well as Maine's share of that travel, led to year-over-year increases in Maine's visitation, both day and overnight. It is clear that some of the reason for Maine's success in the summer of 2010 compared to 2009, especially in a difficult travel marketplace, is a byproduct of the improved weather. Additionally, as Maine continues to better position itself as having more and better non-weather dependent options (such as dining and shopping), it should be better insulated against wild swings in visitation being driven by the weather.

Conclusions

- **Overnight travelers' are shortening their trips.** Likely as a response to the economy, there is a reduction in stays of a week or longer during the summer of 2010, as travelers are instead choosing to spend long weekends away. As a result of these shorter trips, we see reduced usage of cottages, cabins and vacation homes as travelers instead choose hotels, motels, and resorts for these types of stays. Positively, these visitors are packing in a great deal of activity in a shorter stay, as spending remains mostly constant for dining, retail and recreation.
- **Overnight visitor opinions have returned to very positive levels.** There were large year-over-year improvements in a couple of key metrics among overnight visitors to Maine. These include likelihood to recommend Maine, Maine having a variety of activities compared with other destinations, and several trip highlight attributes. These all suggest that the issues among overnight visitors who visited Maine in the summer of 2009 were specific to the conditions last summer, and highlight the vulnerability of Maine's tourism industry to weather related issues. A troubling sign among day visitors, whose trip highlights often included shopping and dining, were decreased rating of Maine's quality of customer service and availability of family dining. This may be a function of increased day visitation, particularly on some of the days with ideal weather putting a strain on these resources. These same decreases were not shared by overnight visitors to Maine, who were less concentrated on the Southern Maine coast.
- **Positively, there are continued signs that the focus on Maine's cuisine and shopping have been noticed.** There was a year-over-year increase in the percent of day visitors who came to Maine because of shopping in 2010. Accordingly, more day visitors reported that shopping was a highlight of their trip to Maine. Both overnight and day visitors were more likely to report that dining out was a highlight of their trip during summer 2010. These are additional positive signs that efforts to communicate the great shopping and dining options in the state of Maine are helping visitors to notice and experience this breadth, adding an additional dimension to Maine's appeal as a vacation destination.



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