

# Maine Office of Tourism Visitor Tracking Research 2008 Annual Report: *Executive Summary*

*Prepared by*



providing direction in travel & tourism

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# Introduction

- The Maine Office of Tourism has commissioned Davidson-Peterson Associates to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of both visitors and prospective visitors.
- This research program was designed to:
  - Profile Maine visitors and best prospects in demographic terms as well as in their travel patterns;
  - Explore perceptions of Maine among visitors and best prospects;
  - 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 eRewards national online panel.
- Information is gathered using three main surveys on an ongoing basis:
  - **Regional Travel Survey**
    - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
    - Respondents are screened and qualified for one of three different surveys:
      - Maine Overnight Visitor Survey – travelers have taken an overnight trip in Maine during the past four weeks;
      - Maine Prospect Survey – travelers have taken an overnight leisure trip to New England or the Atlantic Provinces in the past four weeks, but have not traveled to Maine in the past three years; and
      - Maine Future Opportunities Survey – travelers have taken an overnight leisure trip in the past four weeks, but not within Maine or its key competitive states/provinces.
  - **Maine Day Visitor Survey**
    - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who have taken a day trip in Maine that is at least 50 miles from home within the past four weeks.
  - **National Omnibus Survey**
    - 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 late June 2008 and April 9, 2009.
- Data was collected between July 28, 2008 and May 9, 2009. The number of completed surveys collected for each research component are as follows:
  - Maine Overnight Visitor Survey – 3,320
  - Prospect Survey – 1,600
  - Future Opportunities Survey – 1,111
  - Maine Day Visitor – 1,890
  - National Omnibus Survey – 16,840

# Visitation & Expenditure Methodology Notes

- It is important to note that due to methodological differences, visitation and expenditure figures presented in this report *are not comparable* to figures published for previous years. These differences include:
  - **Timeframe** – 2008 numbers in this report represent July 2008 through early April 2009. Visitation & Expenditure numbers *do not include* May and June 2008.
    - **Impact:** Including these months would add visitors and expenditures to the 2008 totals.
  - **Day Visitor Definition** – In 2008, a day trip was defined as a trip that is at least 50 miles from home. This was defined as such to eliminate typical trips that are close to home. In previous years, there was no minimum distance defined for a day trip.
    - **Impact:** The minimum distance from home reduces the total number of day visits and day trip spending for 2008.
  - **Geography** – In 2008, day and overnight visitation and spending included Canadian residents. Also, 2008 day visitation and spending included US and Canadian residents who live within 100 miles of Maine. Previously, Canadians were excluded from visitation and spending figures. Meanwhile, US residents had to live within 150 miles of Maine to be counted as a day visitor.
    - **Impact:** Including Canadian respondents adds to the 2008 totals. The 100 mile radius definition reduces day trip visitation and spending.
  - **Children** – The 2008 data include children who traveled with adults. Previous visitation totals only included adults.
    - **Impact:** Including children adds to the 2008 number of visitors.

# 2008 in Context

- According to the NOAA, “The year 2008 in Portland, Maine will go into the record books as one of the wettest years ever recorded in the past 138 years.”

	2008	Deviation from Mean
Temperature	46.8	+1.1 degrees
Precipitation	61.24”	+15.4”
Snowfall	91.4”	+25.0”

– Internet Source: [forecast.weather.gov/product.php?site=NWS&prodcut=CLA&issuedby=PWM](http://forecast.weather.gov/product.php?site=NWS&prodcut=CLA&issuedby=PWM)

- The Canadian dollar was particularly strong from January through September, with the currency being on par with the US dollar on several occasions during this time period. For the year in aggregate, the average exchange rate was \$0.94 USD/\$1.0 CAD. Thus far in 2009, the average exchange rate is \$0.84 USD/\$1.0 CAD.
- Gasoline prices spiked to \$4.16 per gallon in New England the week of June 16. Prices remained above \$3.00 per gallon through mid-October before declining to \$1.74 a gallon by the end of the calendar year.
- The Consumer Confidence Index reading for January 2008 was 87.9. By December, the Index declined to 38.0, which was an all-time low at that time.

# Key Visitor Figures

- There were an estimated 6.2 million overnight trips and 6.4 million day trips to Maine in 2008, resulting in 15.4 million overnight visitors and 16.5 million day visitors to the state.
- Overnight visitors to Maine spent an estimated \$5.8 billion on goods and services during their trip while day visitors spent a \$1.65 billion in the state.
- Maine received 1% of the US leisure travel market in 2008 while receiving 0.7% of the VFR travel market and 0.6% of the business travel market. Each of these figures trail Massachusetts and Connecticut but are higher than other New England States.

# Estimated Visitation to Maine

In 2008:

- There were an estimated 6.2 million overnight trips and 6.4 million day trips made to Maine.
- This resulted in 15.4 million overnight visitors and 16.5 million day visitors to the state.

Overnight Travel*					Day Travel*			
	Leisure	Business	VFR	Total	Leisure	Business	VFR	Total
<b>Net 2008 Maine Trips</b>	2,660,382	885,725	2,628,344	6,174,450	3,060,995	1,219,597	2,126,669	6,407,262
<i>Non-Maine Residents</i>					1,577,327	658,582	1,148,401	3,384,310
<i>Maine Residents</i>					1,483,668	561,015	978,268	3,022,951
<b>Net 2008 Visitors</b>	7,374,080	1,863,850	6,184,518	15,422,448	8,501,963	2,362,249	5,664,612	16,528,824
<b>Summer Trips</b>	1,246,329	239,679	1,030,618	2,516,625	1,840,237	649,747	1,228,962	3,718,946
<b>Summer Visitors</b>	3,601,890	503,325	2,545,626	6,650,841	5,594,320	1,124,062	3,416,514	10,134,896
<b>Fall Trips</b>	998,238	462,598	949,544	2,410,381	653,822	309,705	496,726	1,460,253
<b>Fall Visitors</b>	2,645,332	989,960	2,193,446	5,828,739	1,444,948	730,905	1,261,683	3,437,535
<b>Winter Trips</b>	415,815	183,448	648,182	1,247,444	566,936	260,145	400,892	1,228,063
<b>Winter Visitors</b>	1,126,858	370,564	1,445,446	2,942,868	1,462,695	507,282	986,415	2,956,392

# Estimated Overnight Visitor Expenditures

In 2008:

- Overnight visitors spent an estimated \$5.8 billion on goods and services during their trips to Maine.
- Overnight leisure visitors spent the largest portion of the total – spending \$3.0 billion during their trips to Maine.
- Lodging accounts for the largest portion of overnight visitors' expenditures – amounting to \$2.0 billion of the total.

Overnight Travel*				
	Leisure	Business	VFR	Total
<b>Net Spending</b>	\$3,018,176,775	\$706,719,978	\$2,075,366,706	<b>\$5,800,263,459</b>
<b>Spending by Category:</b>				
<b>Lodging</b>	\$1,117,307,232	\$312,111,776	\$572,926,425	<b>\$2,002,345,433</b>
<b>Transportation</b>	\$409,459,394	\$113,045,082	\$386,839,670	<b>\$909,344,145</b>
<b>Food</b>	\$734,744,301	\$166,507,443	\$522,094,252	<b>\$1,423,345,996</b>
<b>Retail Goods</b>	\$597,787,835	\$77,128,933	\$459,145,413	<b>\$1,134,062,182</b>
<b>Recreation</b>	\$158,878,013	\$37,926,745	\$134,360,945	<b>\$331,165,703</b>

# Estimated Day Visitor Expenditures

- Non-Maine Residents who took a day trip to Maine spent \$1.04 billion dollars in Maine.
- Combined with the \$610 million spent on day trips by Maine residents, \$1.65 billion was spent by day visitors to Maine in 2008.

## Day Travel: Non-Maine Residents\*

	Leisure	Business	VFR	Total
<b>Net Spending</b>	\$561,843,877	\$212,985,419	\$270,000,559	<b>\$1,044,829,855</b>
<b>Spending by Category:</b>				
<b>Transportation</b>	\$108,567,417	\$66,009,674	\$78,516,176	<b>\$253,093,268</b>
<b>Food</b>	\$156,896,717	\$82,961,575	\$77,987,912	<b>\$317,846,203</b>
<b>Retail Goods</b>	\$250,432,208	\$47,516,691	\$95,719,223	<b>\$393,668,122</b>
<b>Recreation</b>	\$45,947,536	\$16,497,479	\$17,777,247	<b>\$80,222,262</b>

## Day Travel: Maine Residents\*

	Leisure	Business	VFR	Total
<b>Net Spending</b>	\$306,540,645	\$148,495,060	\$155,075,043	<b>\$610,110,749</b>
<b>Spending by Category:</b>				
<b>Transportation</b>	\$74,465,297	\$89,083,572	\$50,185,148	<b>\$213,734,017</b>
<b>Food</b>	\$81,572,067	\$32,213,481	\$51,075,372	<b>\$164,860,920</b>
<b>Retail Goods</b>	\$119,717,171	\$21,178,316	\$42,515,527	<b>\$183,411,014</b>
<b>Recreation</b>	\$30,786,111	\$6,019,691	\$11,298,995	<b>\$48,104,797</b>

Combined – Maine residents and Non-Residents spent \$1.65 billion in Maine last year.

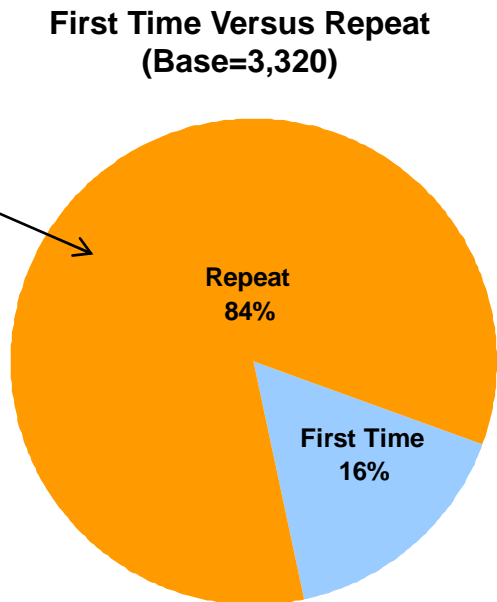
# The Maine Overnight Visitor Experience



# Repeat versus First Time Visitors

- Overall, one-sixth of overnight visitors report that it was their first visit to Maine. This percentage increases to more than one-fifth to one-quarter for visitors who went to either the Highlands or Lakes/Mountains regions, respectively.

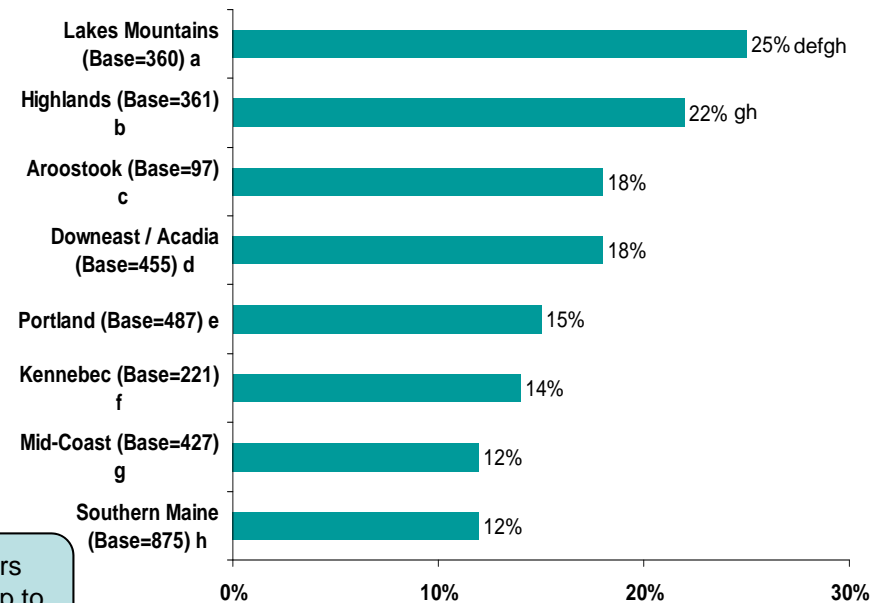
In 2008, the average overnight Maine visitor has been to Maine an average of 14 times in the past five years



Leisure visitors are more often visiting Maine for the first time than those in Maine to see friends or relatives (19% vs. 13%).

40% of overnight leisure visitors report that they took their first trip to Maine before 1980

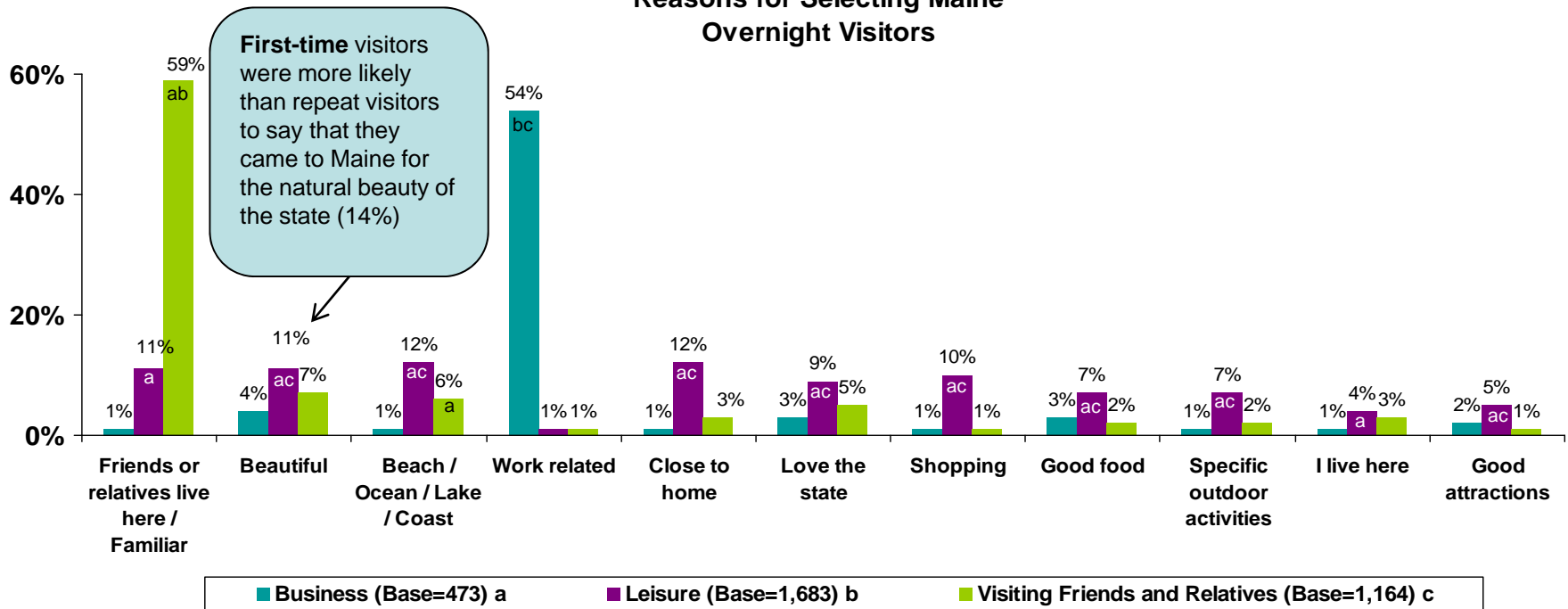
**Percent of Visitors to Each Region Who Were First-Time Maine Visitors (Base=3,320)**



# Reasons for Selecting Maine by Trip Type: Overnight Visitors

- More than half of VFR overnight visitors report that they chose Maine to visit their friends or relatives. Likewise, most business overnight visitors cited work-related reasons as why they selected the state.
- Conversely, leisure overnight visitors were significantly more likely than VFR or business overnight visitors to choose Maine for reasons including: the beauty of the state, the beach/ocean/coast/lakes, proximity to home, shopping, loving the state, and others.

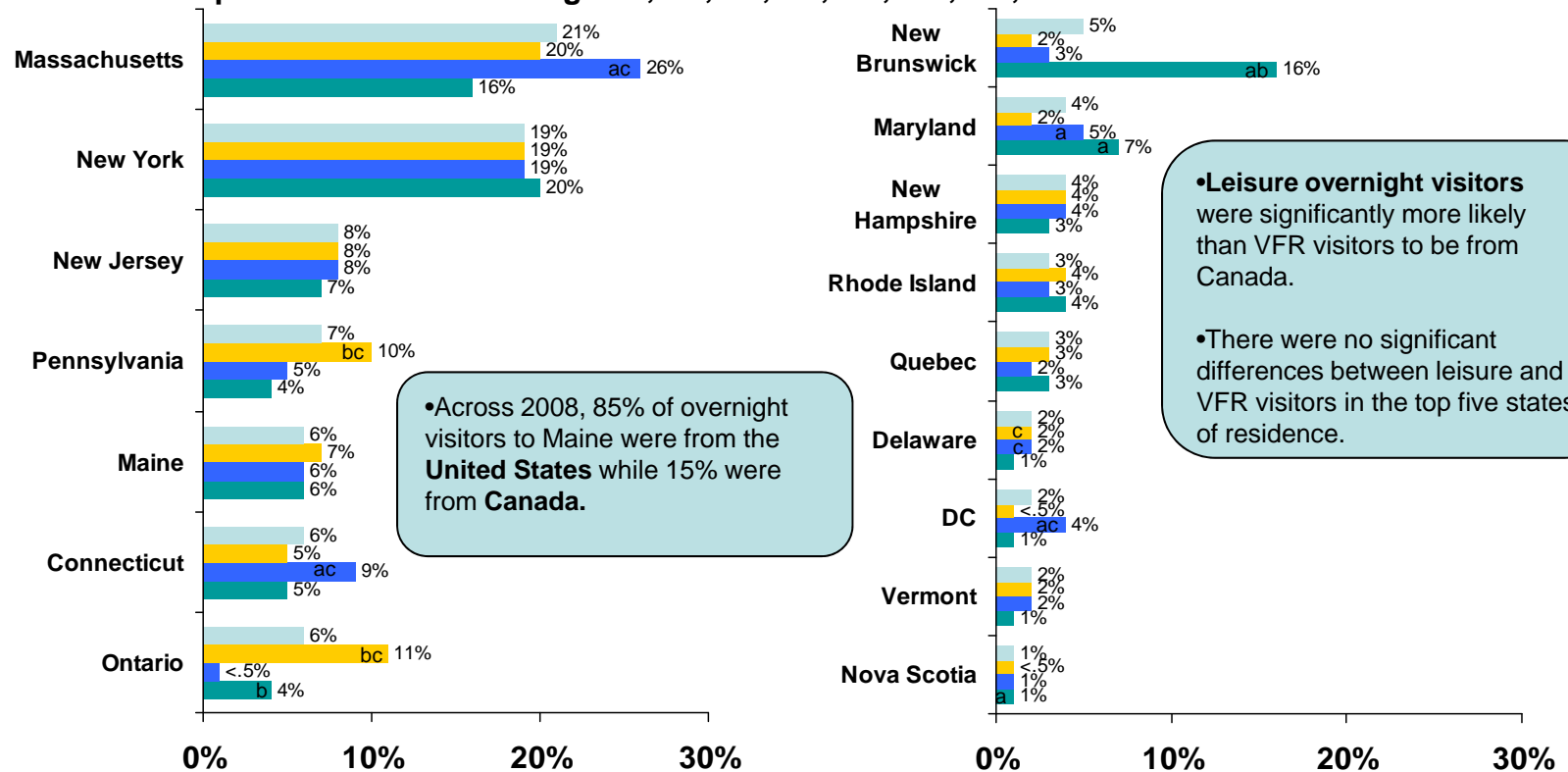
Reasons for Selecting Maine Overnight Visitors



# Residence of Maine Overnight Visitors

- The largest percentage of overnight visitors to Maine come from Massachusetts or New York.
- Fall attracts a significantly greater percentage of visitors from Massachusetts and Connecticut than do the other seasons.
- Summer attracts a greater percentage of visitors from Pennsylvania, and Ontario while winter attracts more people from New Brunswick.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada

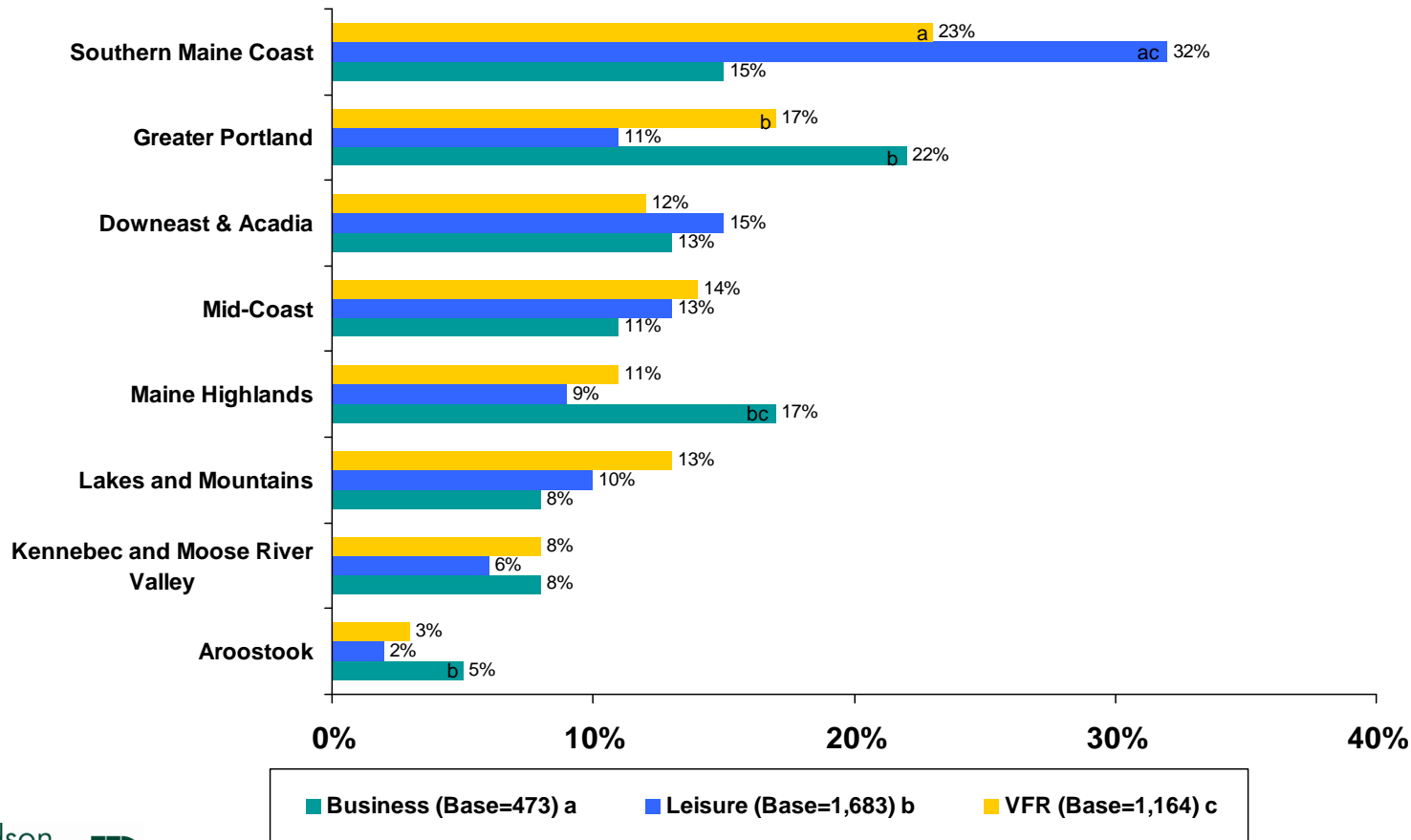


•Across 2008, 85% of overnight visitors to Maine were from the United States while 15% were from Canada.

•Leisure overnight visitors were significantly more likely than VFR visitors to be from Canada.  
 •There were no significant differences between leisure and VFR visitors in the top five states of residence.

# Primary Region by Trip Type: Overnight Visitors

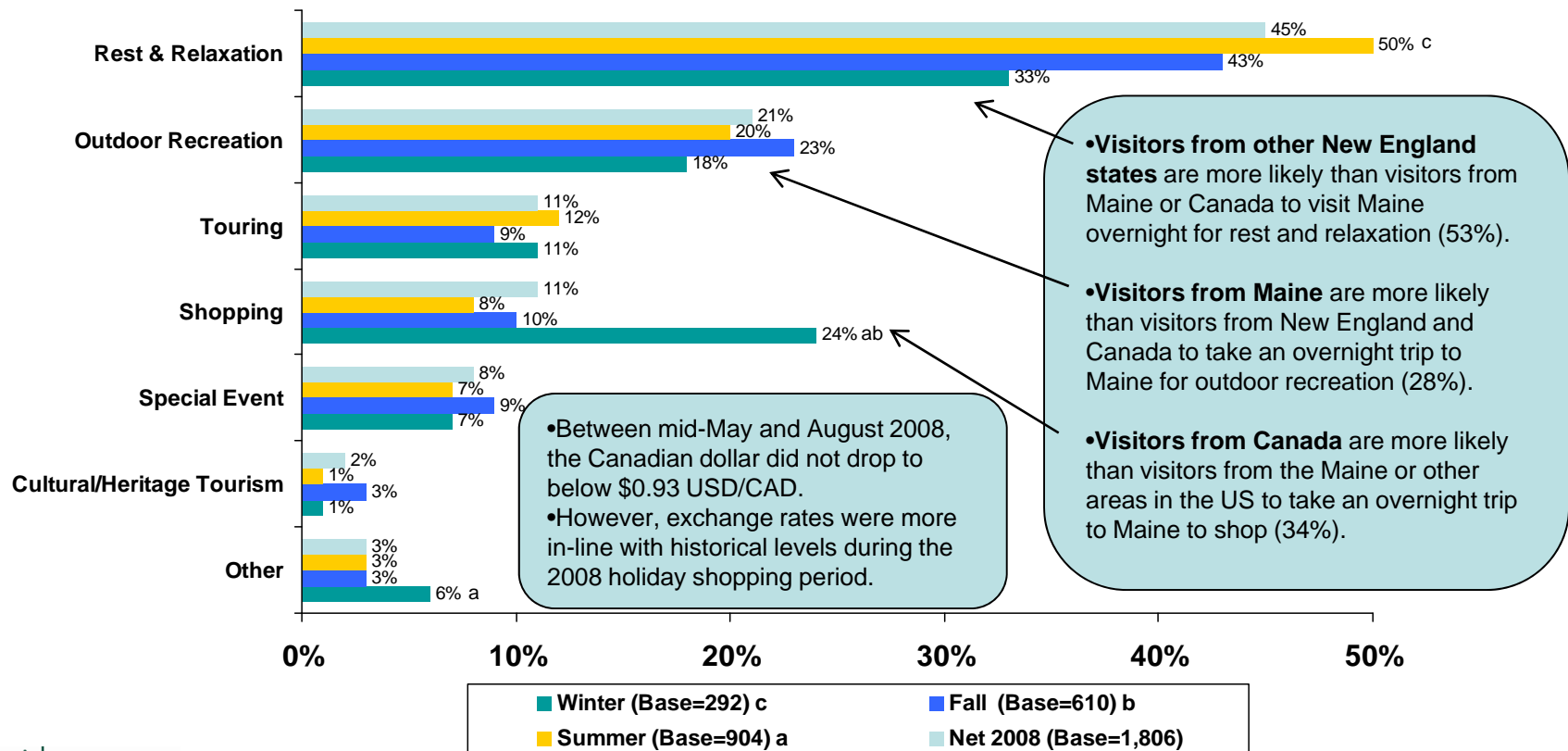
- Overnight leisure visitors are significantly more likely than business or VFR visitors to visit the Southern Maine Coast region as their primary destination.
- At the same time, overnight leisure visitors are significantly less likely than business or VFR visitors to have the Greater Portland region as the primary destination for their trip.



# Primary Purpose of Overnight Leisure Trips

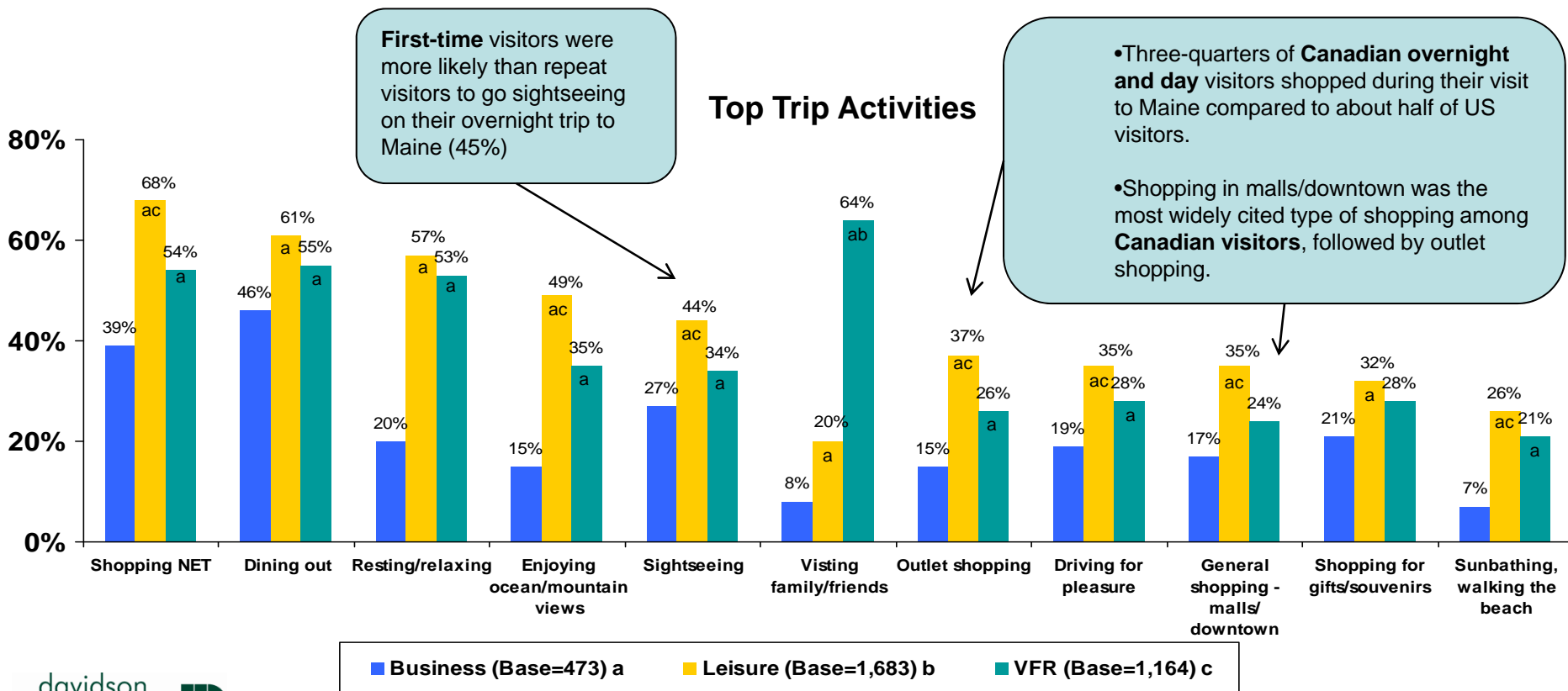
- Rest and relaxation was the primary purpose of overnight leisure trips to Maine.
- However, it's interesting to note that shopping was the most likely primary purpose cited by Canadian visitors. It's important to keep in mind that the exchange rate was particularly favorable for Canadian visitors throughout a large period in 2008, with the Canadian dollar frequently on-or-near par with the US dollar.

**Primary Purpose of Overnight Leisure Trips**



# Overnight Visitor Trip Activities by Trip Type

- Overnight leisure visitors are significantly more likely than VFR or business visitors to report that they engaged in a variety of activities while in Maine.
- Visiting family and friends is the only activity that VFR overnight visitors are significantly more likely than leisure visitors to engage in while in the state.



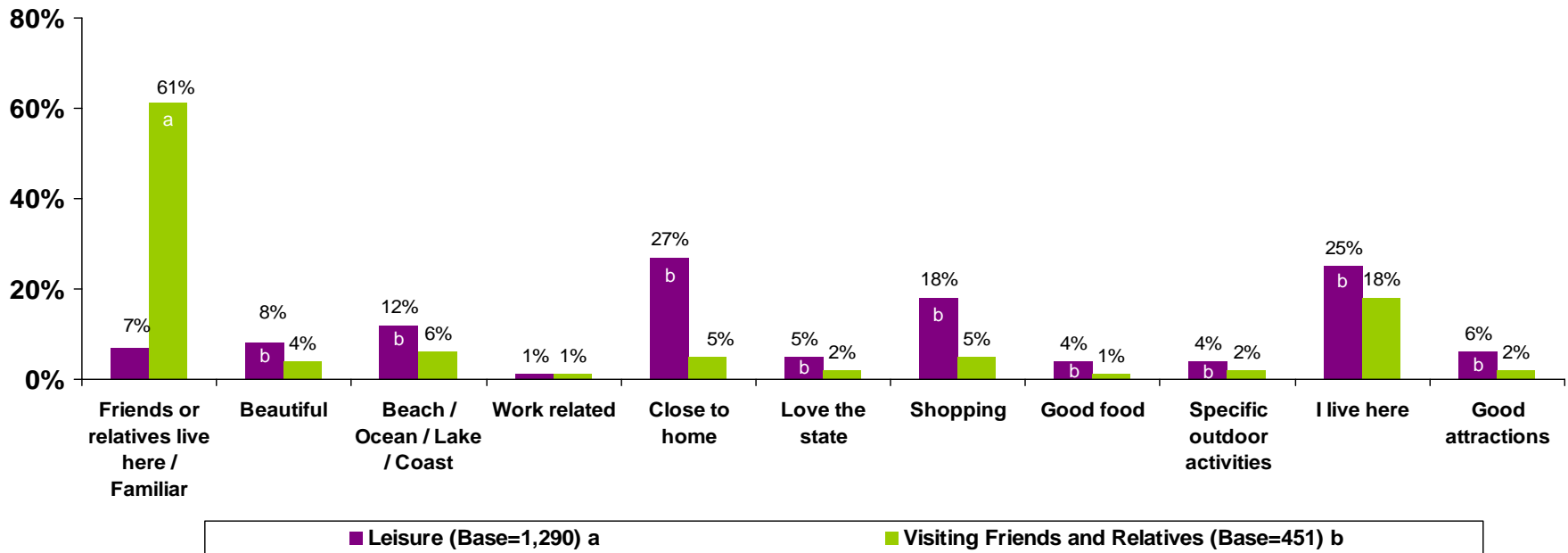
# The Maine Day Visitor Experience



# Reasons for Selecting Maine by Trip Type: Day Visitors

- In a similar pattern to overnight visitors, most VFR day visitors selected Maine to see family and friends. Meanwhile, leisure day visitors were significantly more likely to select Maine for other reasons including its proximity to home, the shopping, owning a property in Maine, or the beach/ocean/lakes/coast.

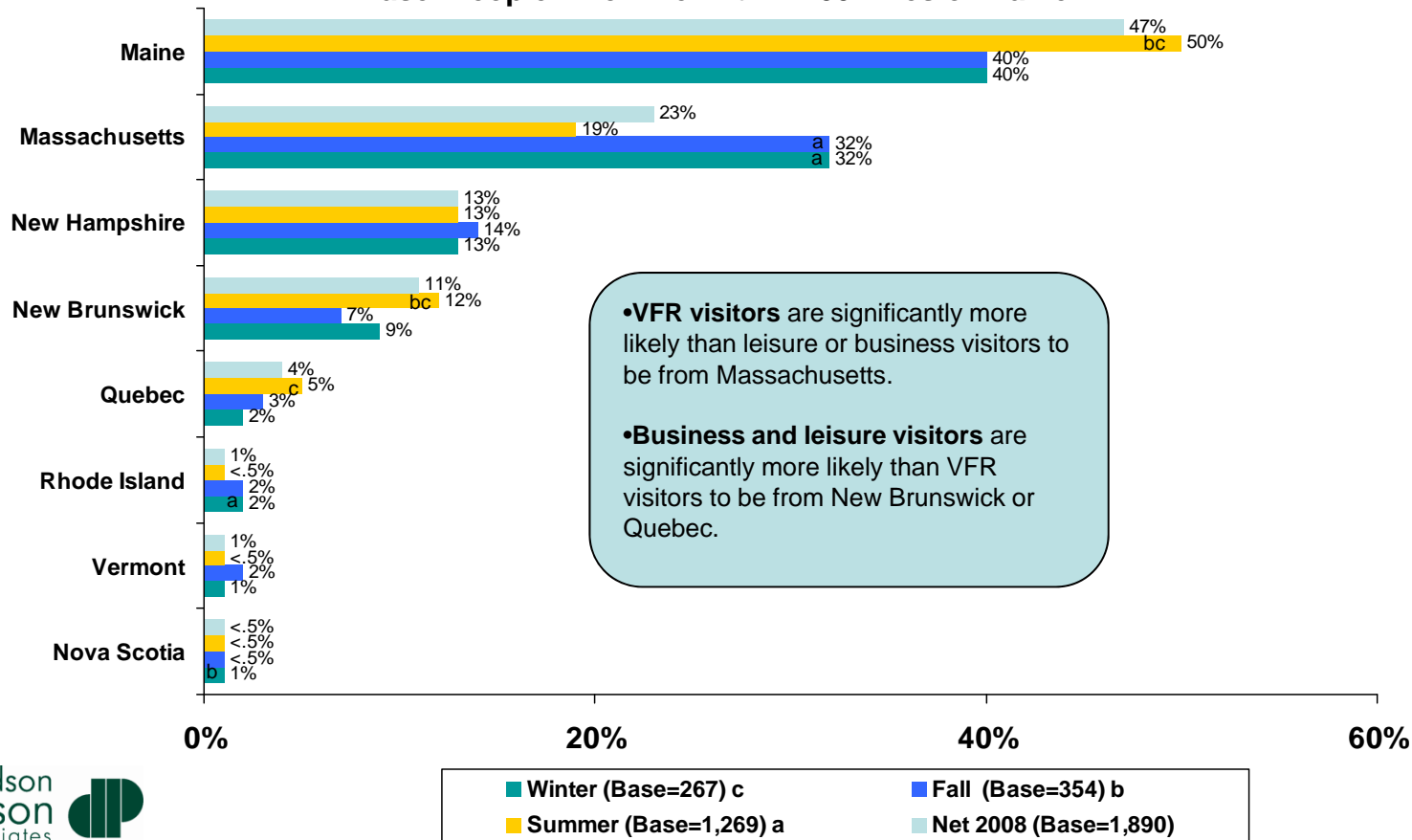
Reasons for Selecting Maine  
Day Visitors



# Residence of Maine Day Visitors

- Day visitors from Maine make up the largest percentage of all day visitors to the state.
- Half of summer day visitors to Maine are from the state – a significantly higher percentage than in any other season.
- One-third of fall and winter day visitors to Maine are from Massachusetts – a significantly higher percentage than those who are from MA in the summer season.

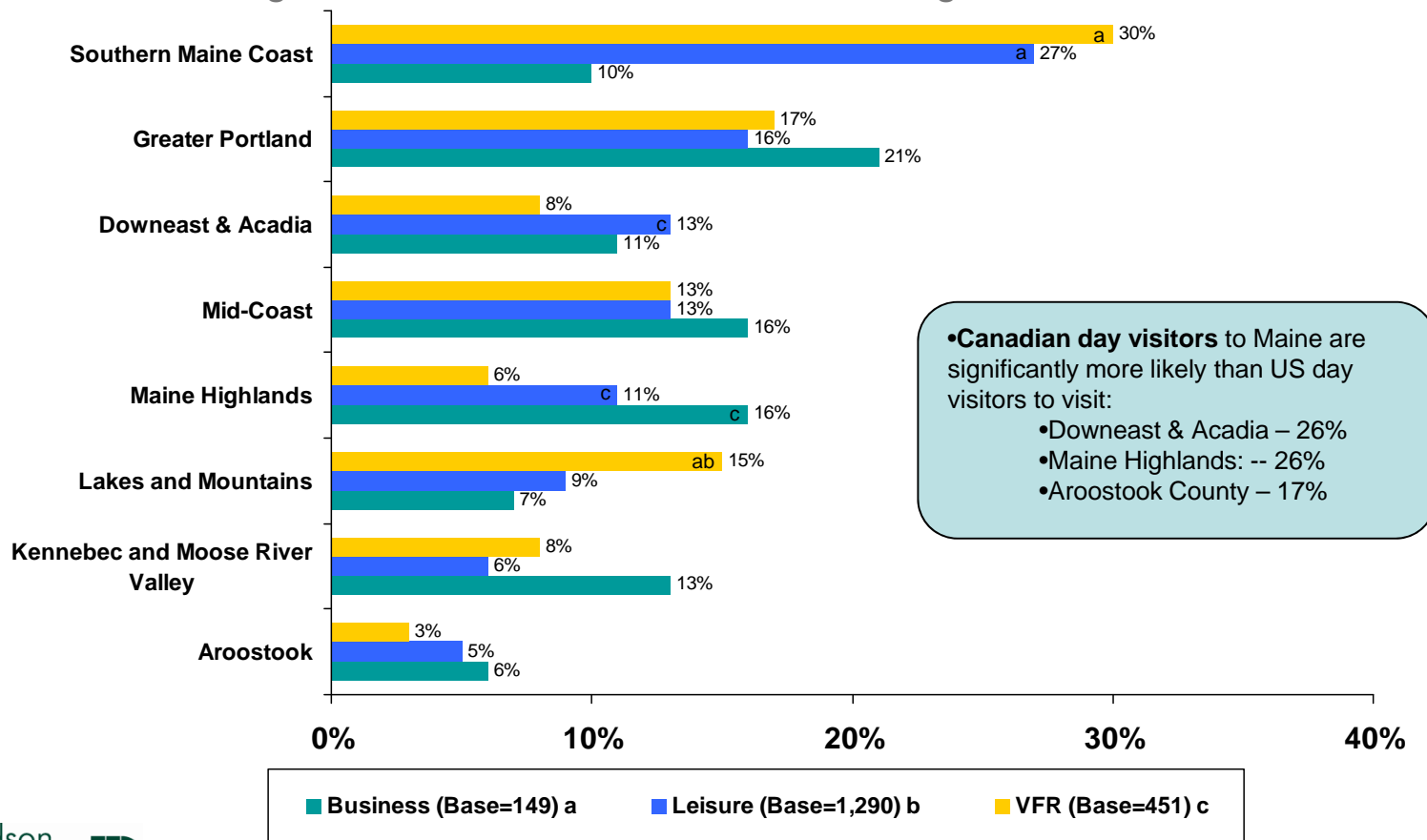
Base: People who Live Within 100 Miles of Maine



Day Q1a. In what state or province do you reside? a,b,c significant difference at 95% confidence level

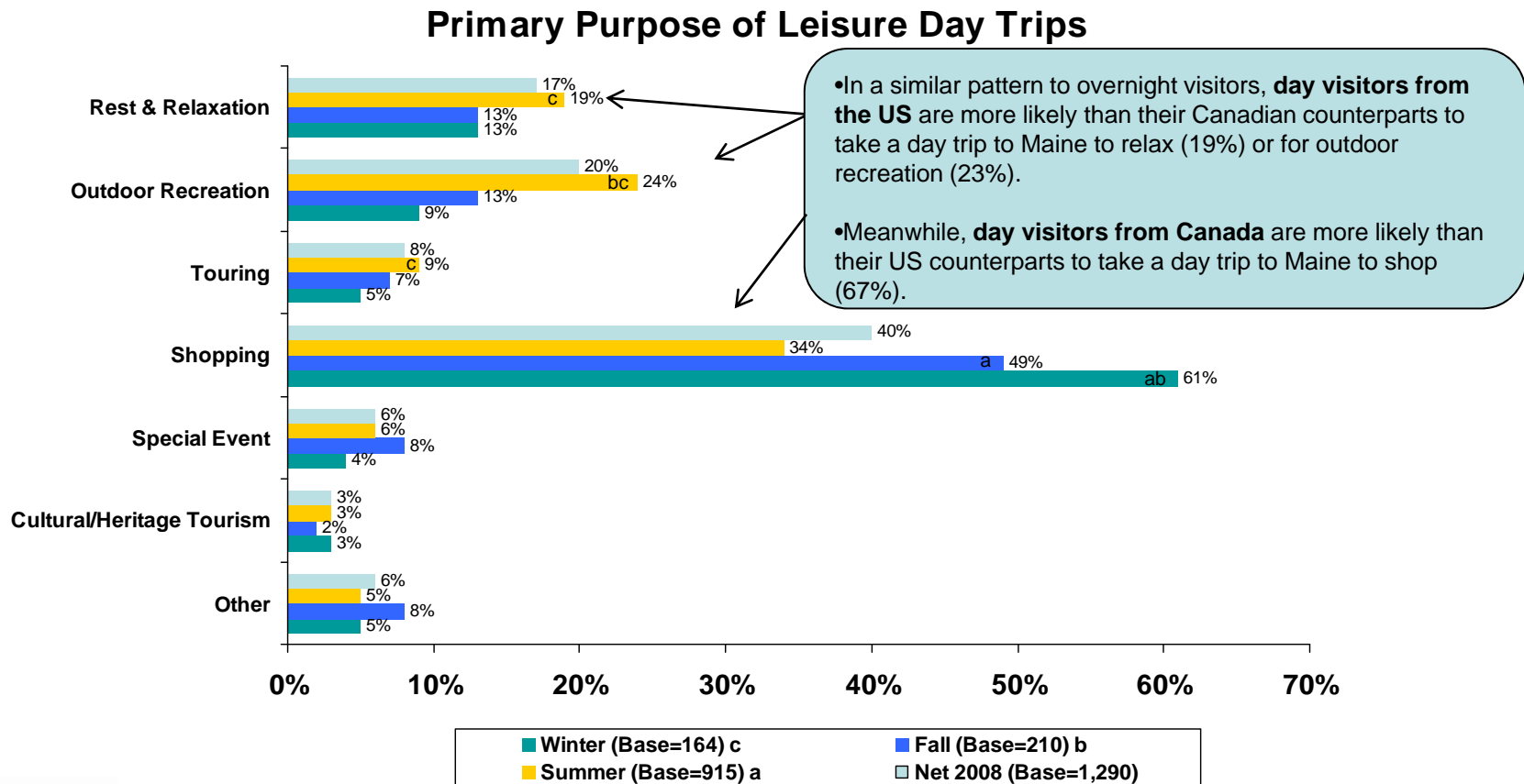
# Primary Region by Trip Type: Day Visitors

- Both leisure and VFR day visitors are significantly more likely than business day visitors to have the Southern Maine Coast region as their primary destination.
- Due to proximity to home, Canadian day visitors tend to have different primary regions than US day visitors. Canadians are significantly more likely than US visitors to go to Downeast/Acadia, the Maine Highlands, and Aroostook County.



# Primary Purpose of Leisure Day Trips

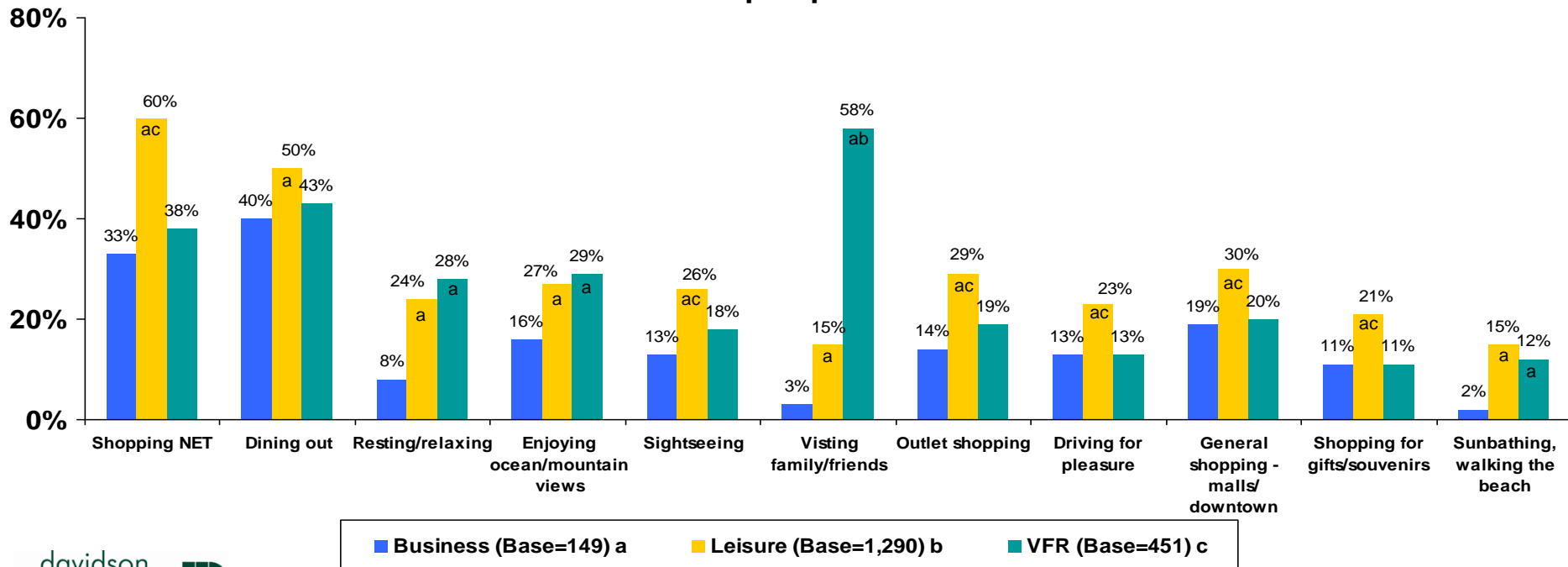
- Canadians' attraction to shopping in Maine is also underscored by the primary purpose of leisure day trips to the state. While one-third of US residents report that shopping was the primary purpose of their leisure day trip, two-thirds of Canadians report this to be the case.



# Day Visitor Activities by Trip Type

- Day leisure visitors are significantly more likely than VFR or business day visitors to engage in a variety of activities while in Maine, including shopping, sightseeing, and driving for pleasure.
- In a similar pattern to overnight visitors, day VFR visitors are significantly more likely than either leisure or business travelers to report visiting family and friends.

Top Trip Activities

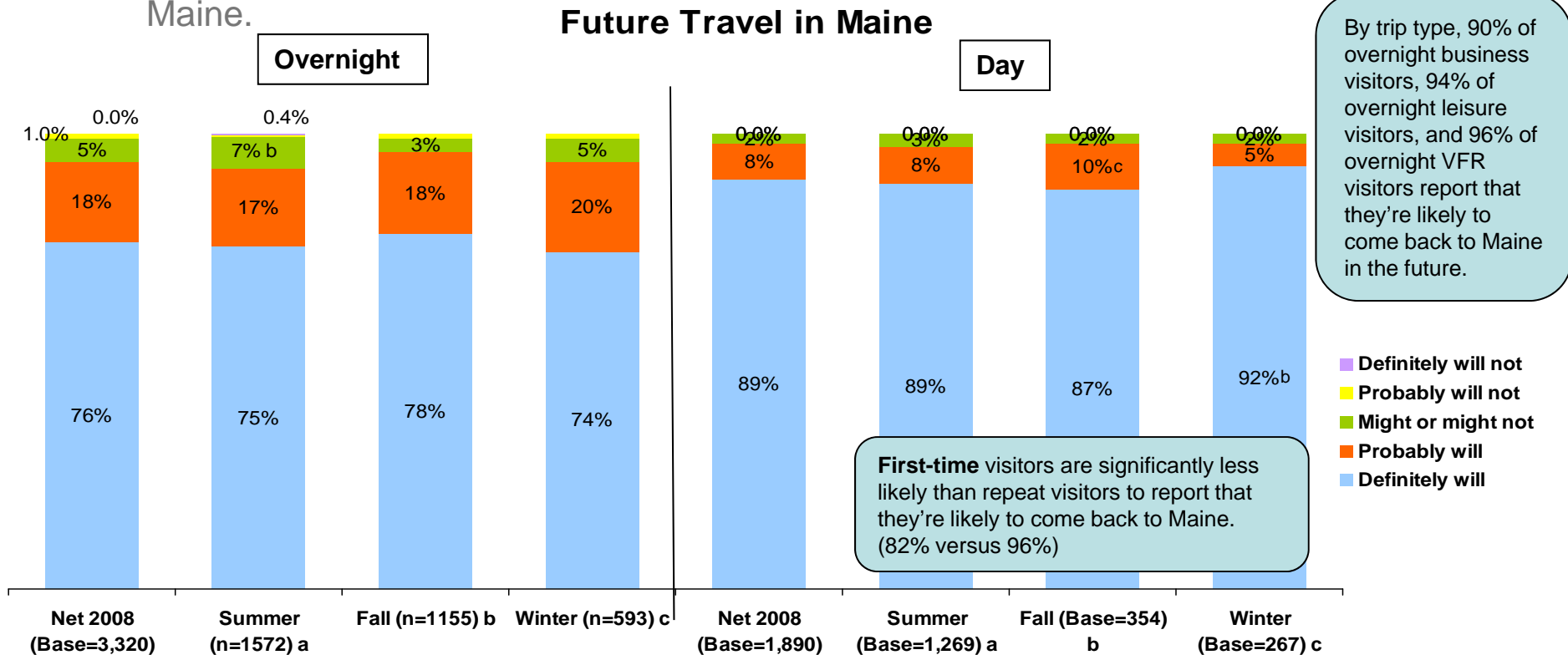


# Key Visitor Metrics & Conclusions



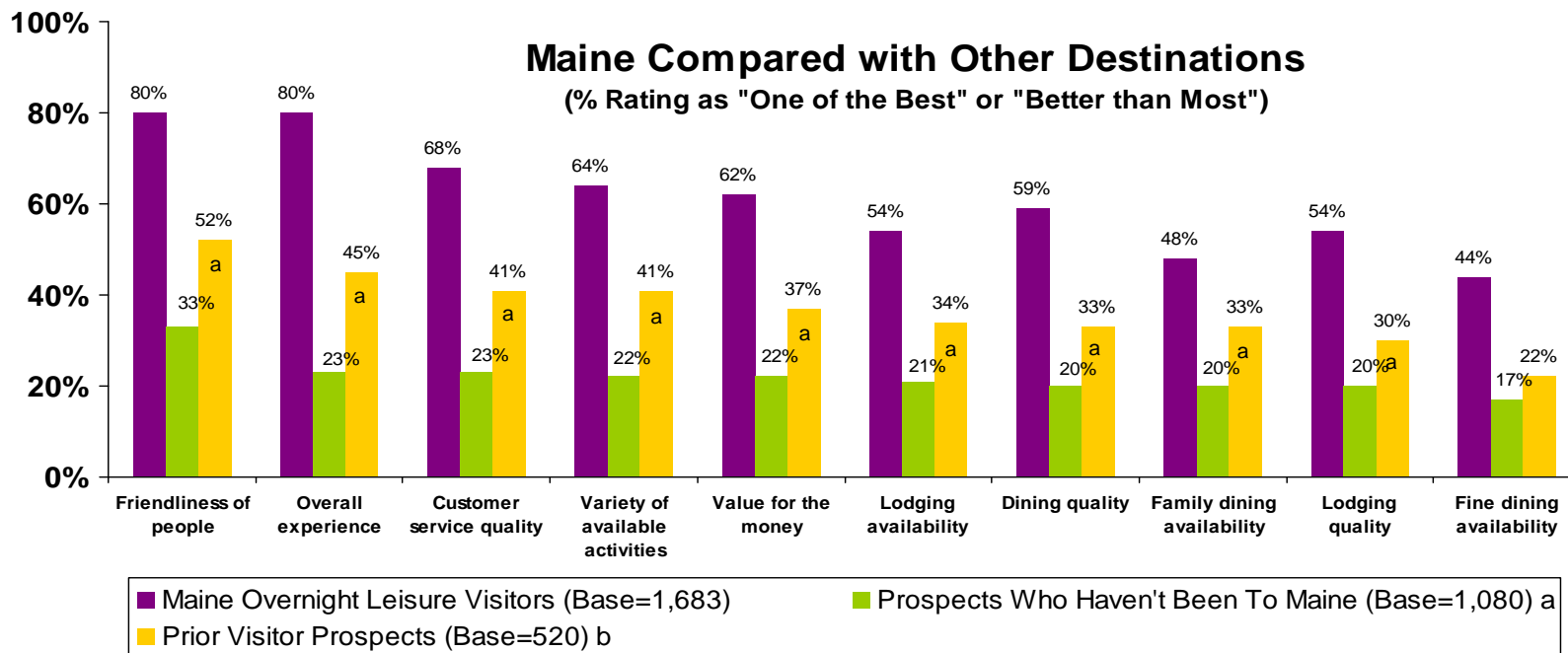
# Future Travel in Maine

- Among overnight visitors, fall has the highest top-two box ratings for the likelihood to return to Maine. Day top-two box is statistically stable across the seasons.
- It's also important to note that the top-two box likelihood to return among overnight visitors is statistically stable across the primary regions visited in Maine.



# Evaluation of Maine as Vacation Destination

- While Maine Prospects who have been to Maine before use similar descriptions as Maine leisure visitors to describe the state, they are less likely to compare Maine positively to other destinations. This represents a large gap between the actual experience of a Maine visitor and the impression of what a Maine trip would be to non-visitors.
- Maine Prospects who have been to Maine are significantly more likely than those who haven't been to the state to compare Maine positively to other destinations.



*Regional Q34. Using the scale provided in the table below, please evaluate your trip to Maine as compared to other destinations you've visited.*

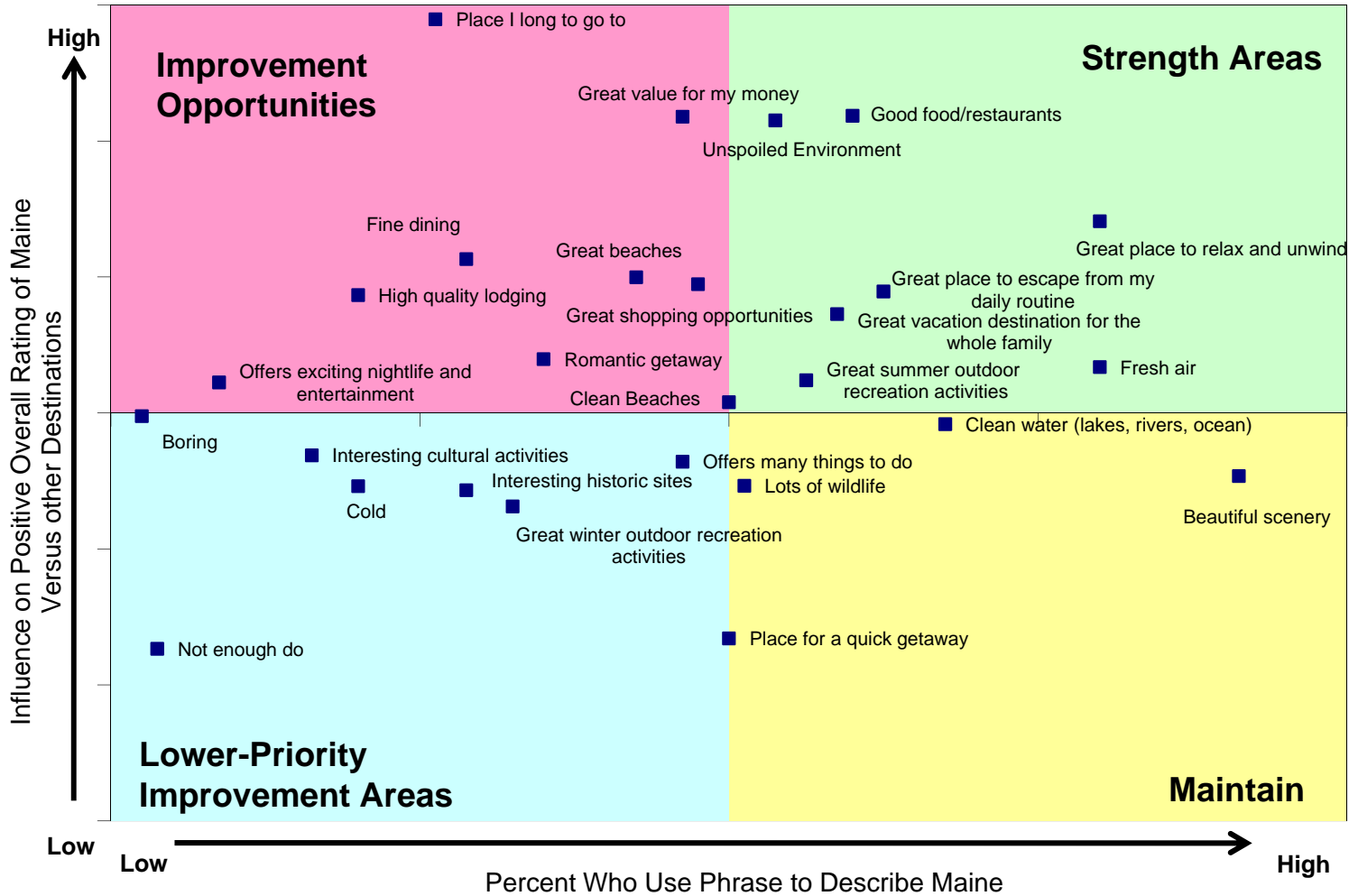
*Regional Q84. Although you may or may not have visited Maine in the past, please indicate your impressions of Maine as a vacation destination as compared to other destinations you've visited using the scale below.*

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

# The Maine Quadrant Analysis

- In the following quadrant chart, we visually highlight the output of a regression model which shows the relationship between how overnight visitors described the state and their overall satisfaction with their experience visiting the state.
- The quadrant chart on the next page includes:
  - *Strength Areas*: Widely used descriptions of Maine by overnight visitors that drive a strong rating of the Overall Experience of Maine compared to other destinations.
  - *Maintenance Areas*: Widely used descriptions that do not do as much to drive a strong rating of the Overall Experience compared to other destinations.
  - *Improvement Areas*: Descriptions that were not widely used by overnight visitors that drive a strong rating of the Overall Experience compared to other destinations.
  - *Lower-Priority Improvement Areas* : Descriptions that were not widely used by overnight visitors that do not drive a strong rating.

# Maine Quadrant Analysis Results



Regional Q34. Using the scale provided in the table below, please evaluate your trip in Maine as compared to other destinations you've visited. a,b,c notes significant difference at 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)

# Conclusions

## *Strengths:*

- Visitors point to friends/family, shopping, beaches, beauty, and rest & relaxation as reasons for selecting Maine and the purpose of their trip. Many of these visitors see Maine as a unique place where they can unwind, escape their daily routine, and enjoy the outdoors.
- Shopping is also an important draw for visitors to the state – especially among Canadians and day visitors. Canadians tend to focus their shopping on downtown areas where they can purchase less expensive goods (especially when the exchange rate is favorable as it was in 2008) while visitors from other areas focus more on outlet shopping for their deals.
- Both overnight and day visitors to Maine point to a wide variety of items like the scenery, outdoor activities, shopping, and time with family and friends as activities they conducted during their visits. It is important to continue to leverage these items when speaking about the state as a destination. Doing so will remind past visitors about their previous trips, which will be particularly effective given the extremely high likelihood to return and likelihood to recommend rates among visitors.

# Conclusions

## *Challenges:*

- There is currently a wide perception gap between visitors and prospects regarding Maine's strengths relative to other destinations. Maine needs to strike a difficult balance between marketing the state to cater to repeat visitors – and have high satisfaction with the state – and finding messages that attract more prospects. The challenge is to do so without alienating the core visitor and reducing return visitation rates.
- Related to the bullet above, while satisfaction among Maine visitors is high, most visitors have been to Maine before and have come to the state for years. The state needs to find ways attract more first-time visitors to ensure that visitation numbers do not contract over time.
- Maine has a clear opportunity – and need – to highlight the wide range and quality of dining and lodging options in the state. The state does not fare as strongly compared to other destinations on these measures, and the quadrant analysis illustrates that these – as well as in shopping – are opportunity areas that can help drive Overall Experience scores relative to other destinations. Highlighting these options will also help decrease the perception delta between visitors to the state and prospects – who are even less likely to think that Maine has enough quality dining and lodging options.



providing direction in travel & tourism

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