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Maine Woods Presentation, April 2012

dpa

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Maine Office of Tourism Maine Woods Presentation

Prepared by



April 2012



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 to explore the motivations of visitors.
- This research program is 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;
 - 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 to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **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 report outlines results from travel occurring between June 2010 and April 2011.
- Data was collected between June 30, 2010 and May 12, 2011. The number of completed surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,992
 - Maine Day Visitor – 1,796
 - National Omnibus Survey – 16,639
- Throughout this presentation, respondents are divided into Maine North Woods visitors (visitors to Maine Lakes & Mountains, Kennebec Valley, The Maine Highlands, and Aroostook tourism regions, as well as visitors to Washington County.
- Throughout this report, the acronym VFR stands for “visiting friends or relatives.”

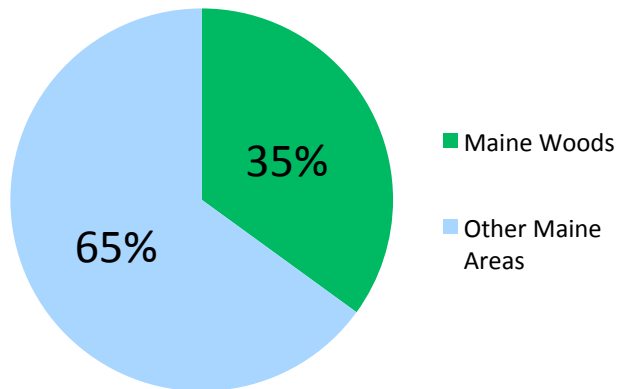
Maine Woods



Overnight Leisure Visitor Demographics

- About one-third of Maine overnight visitors had a primary destination in the Maine Woods regions of Maine.
- Maine Woods visitors skew younger and tend to have a lower income level than coastal visitors.

2010 Maine Overnight Visitors
Base = 2,992

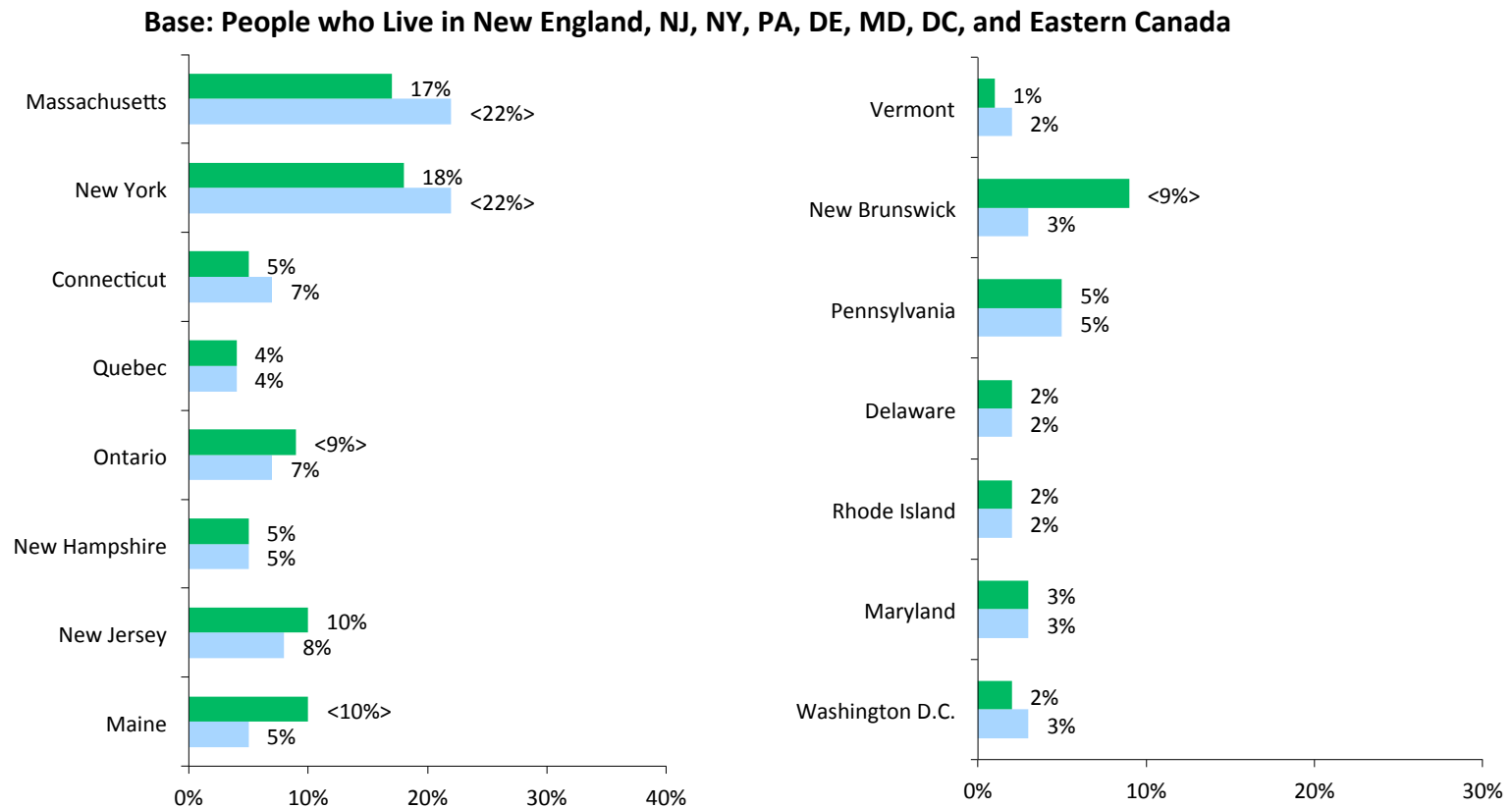


2010		
	Maine Woods (Base=1,054)	Other (Base=1,938)
Mean Age	42.3	<45.2>
< 35	<36%>	29%
35 - 44	20%	19%
45 - 54	20%	22%
55 +	23%	<30%>
Mean Income	\$100,720	<\$106,760>
< \$50,000	<17%>	12%
\$50,000 - \$99,000	38%	35%
\$100,000 +	33%	<37%>
Female	44%	47%
College Degree or Higher	77%	78%
Married	53%	57%
Employed Full Time	66%	64%
Length of Stay	3.7	3.6

<> notes significant difference at 95% confidence level

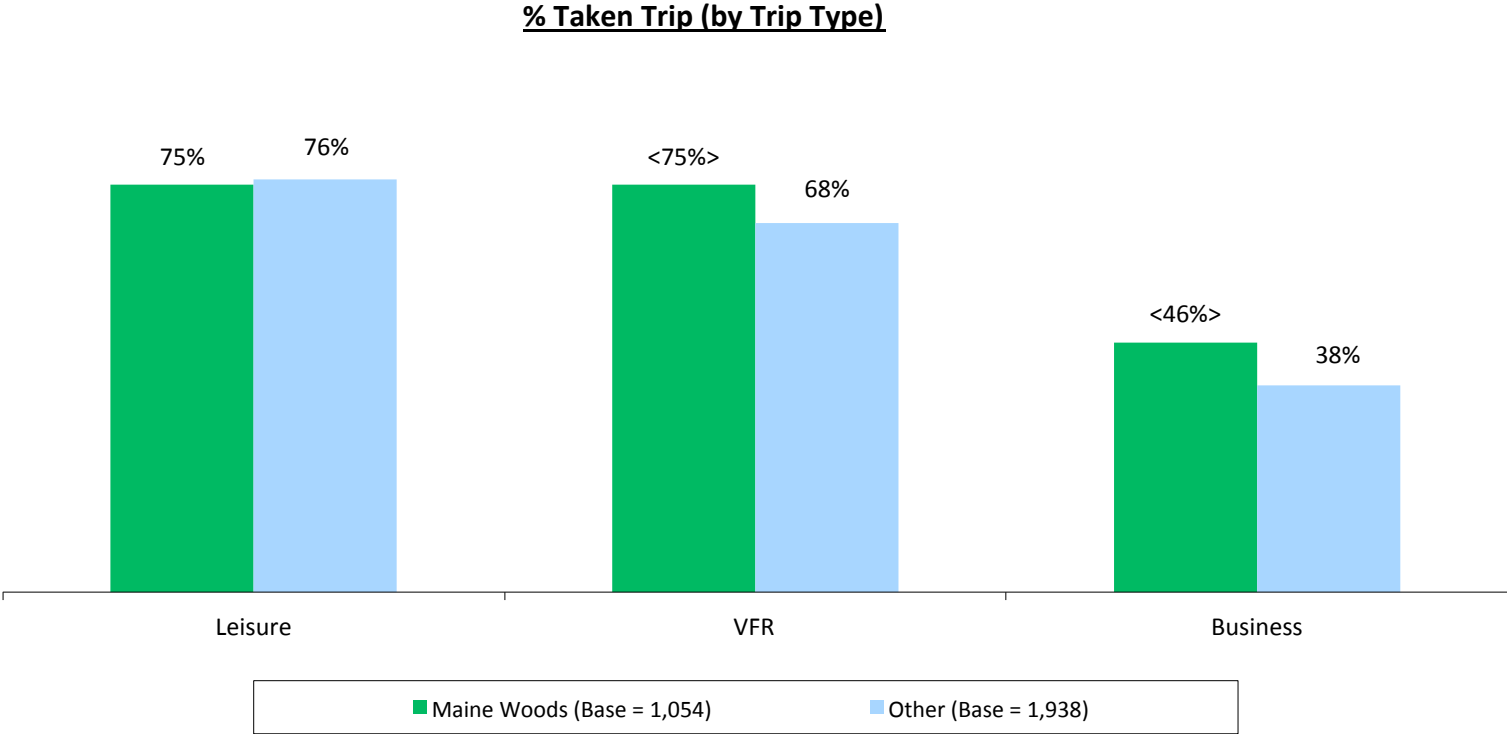
Overnight Leisure Visitor Residence:

- As with the rest of the state, many visitors to the Maine Woods hail from Massachusetts and New York, although Maine Woods visitors are more likely to call New Brunswick, Ontario, or Maine home.



Travel Patterns Among Maine Overnight Visitors

- In addition to traveling to Maine, Maine Woods visitors are more likely to have recently traveled for VFR or Business reasons, suggesting that they are frequent travelers.

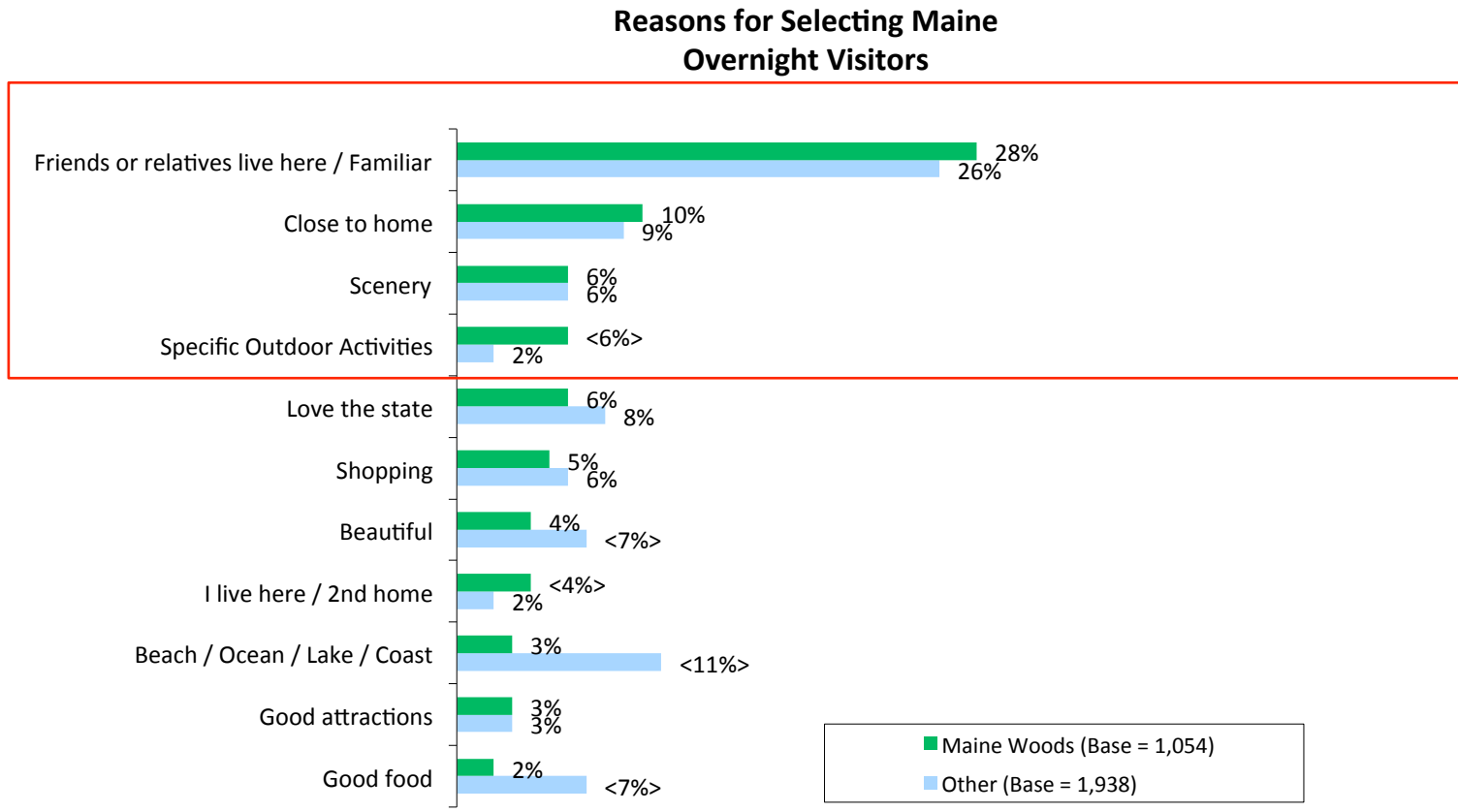


Regional Q2. During the past four weeks, how many times have you taken a trip within the United States or Canada on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

< > notes significant year-over-year difference at 95% confidence level

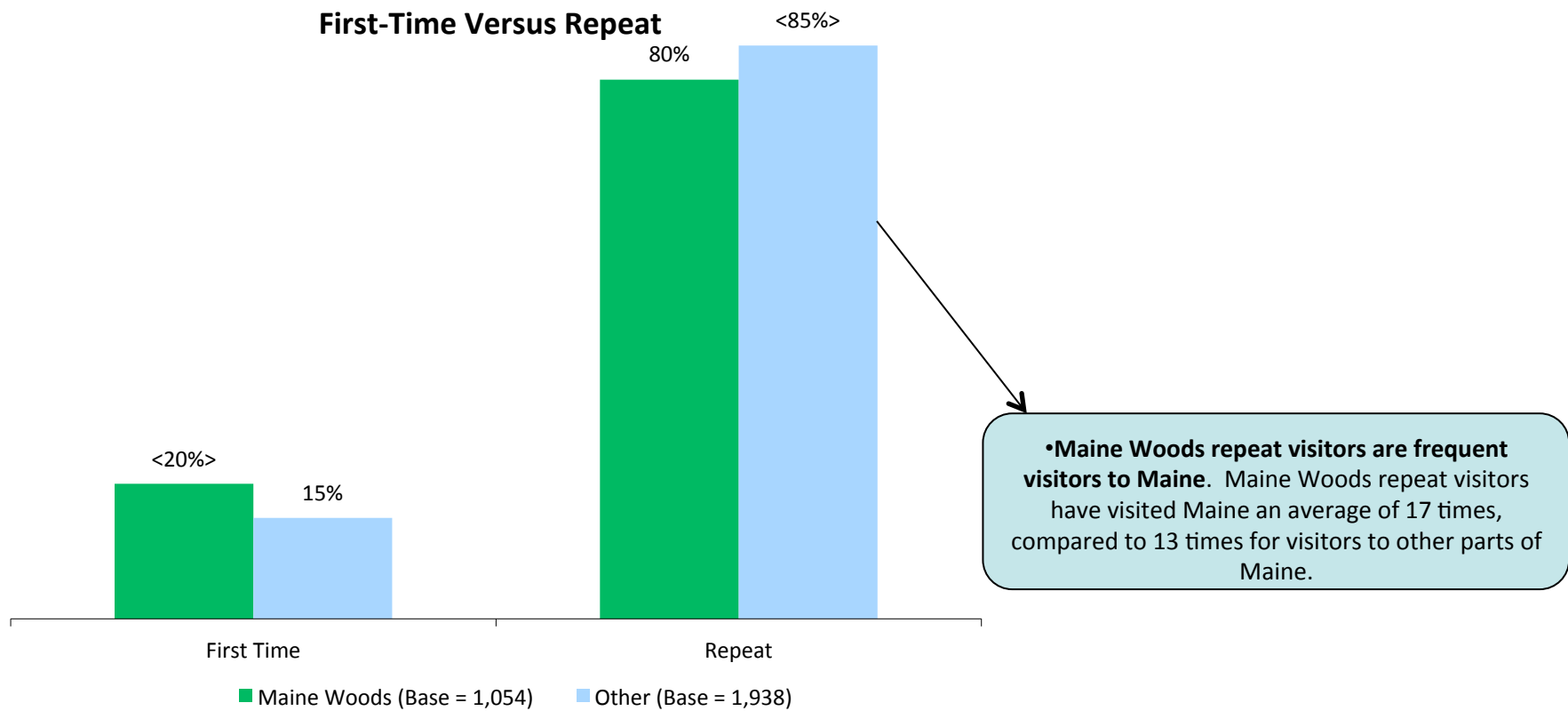
Reasons for Selecting Maine

- Maine Woods visitors are more likely than their counterparts to cite a specific outdoor activity or that they own a 2nd home/timeshare as a reason for selecting Maine. They are not likely to focus on the state’s beauty, presence of the ocean, or good food.



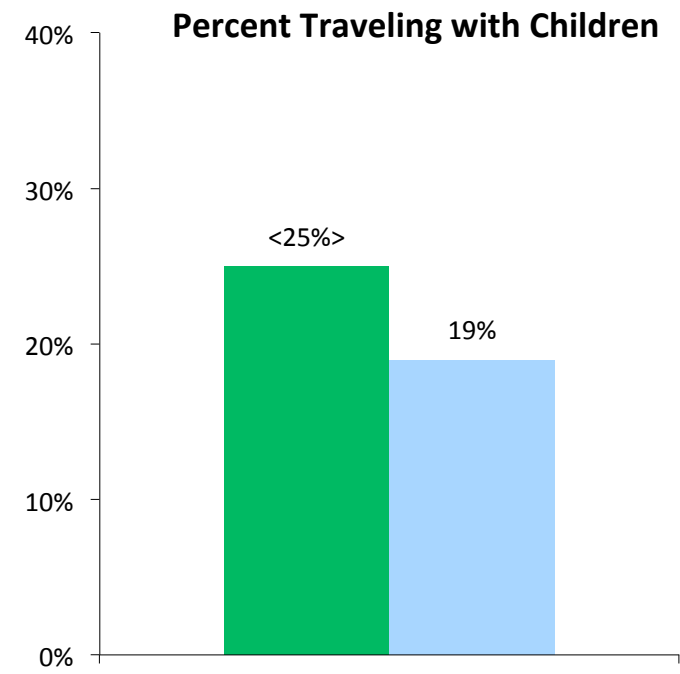
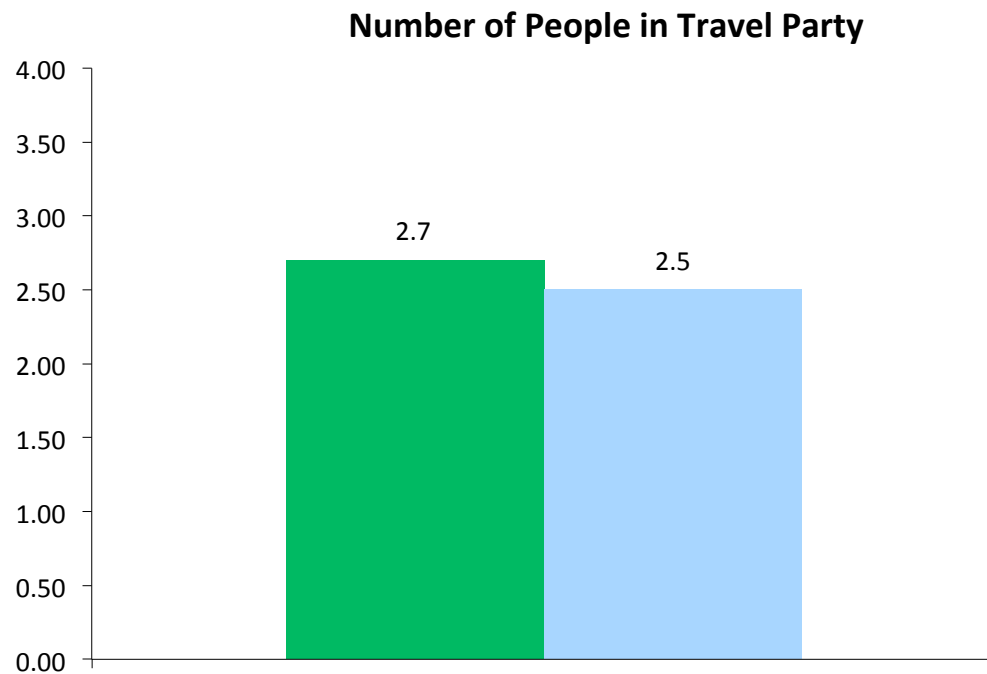
Repeat versus First Time Visitors

- One-in-five Maine Woods visitors are first time visitors to the state, demonstrating that the woods tend to be a greater draw for new visitors than the coastline, which shows stronger repeat visitation.



Travel Party Size and Composition

- Maine Woods travel parties are more likely to include children, although overall party size is similar to those visiting the rest of the state.

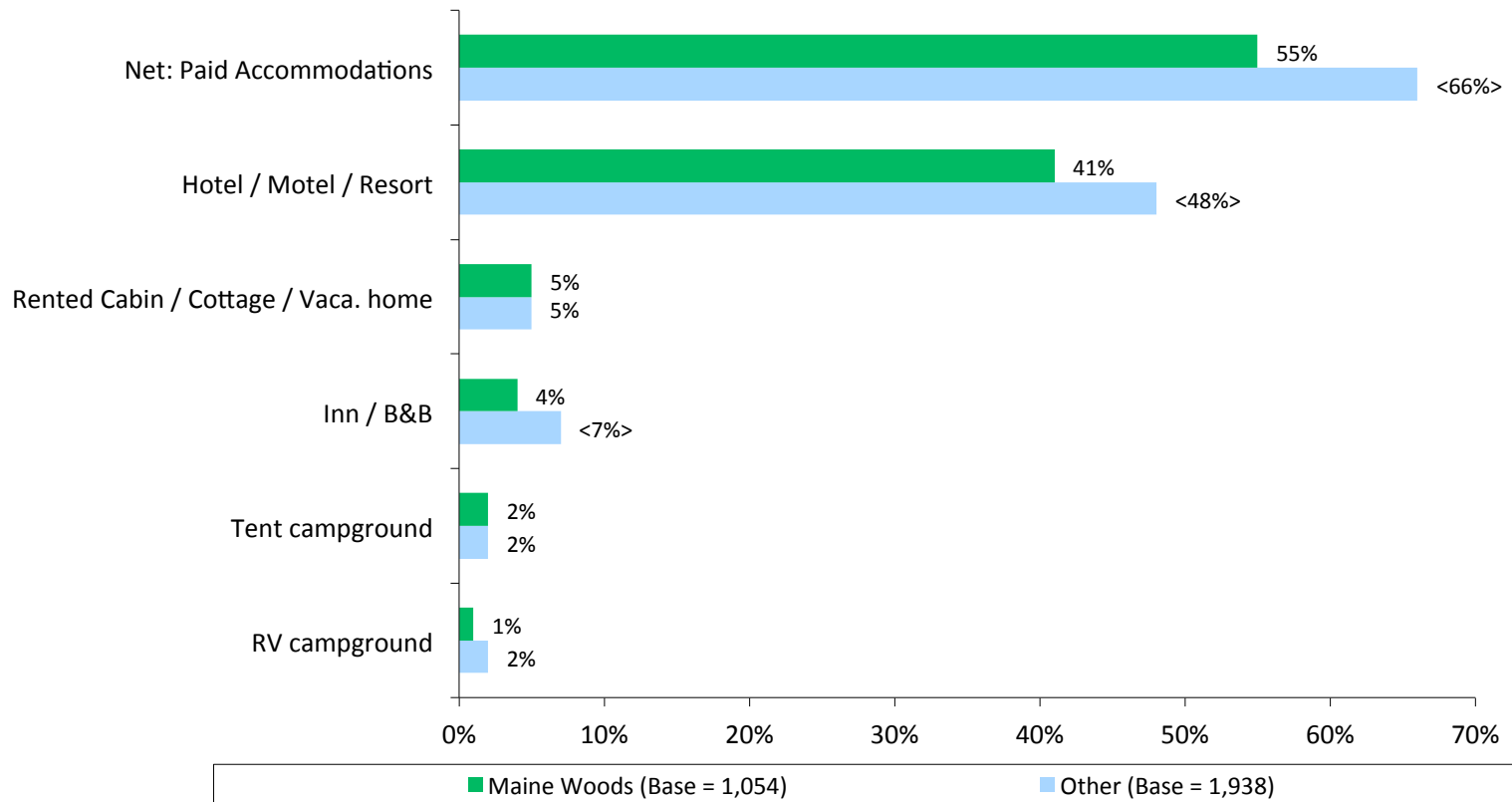


■ Maine Woods (Base = 1,054) ■ Other (Base = 1,938)

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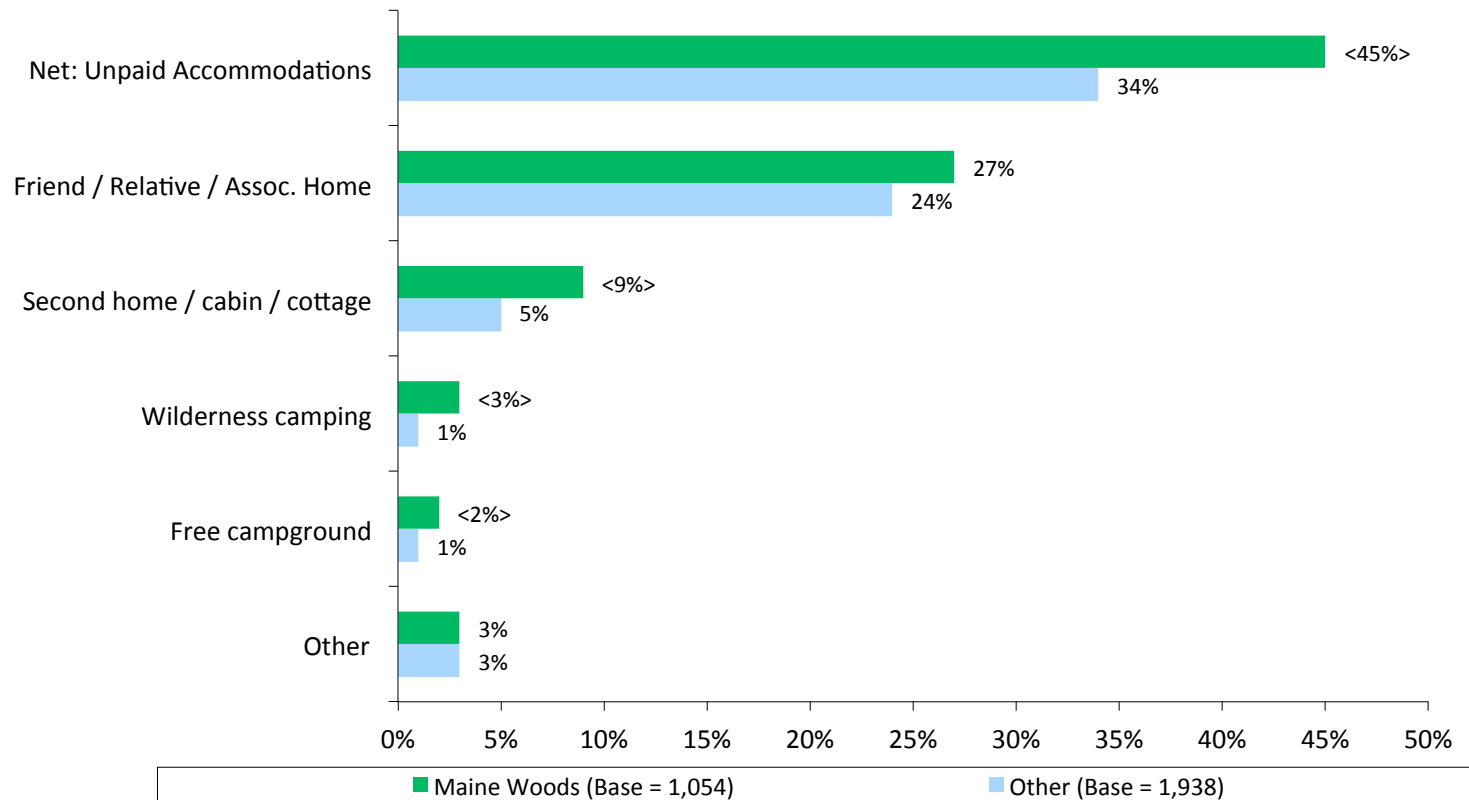
Paid Accommodations While in Maine

- Maine Woods visitors are less likely to stay in paid accommodations in general, particularly in the Hotel/Motel/Resort and Inn/B&B accommodations categories.



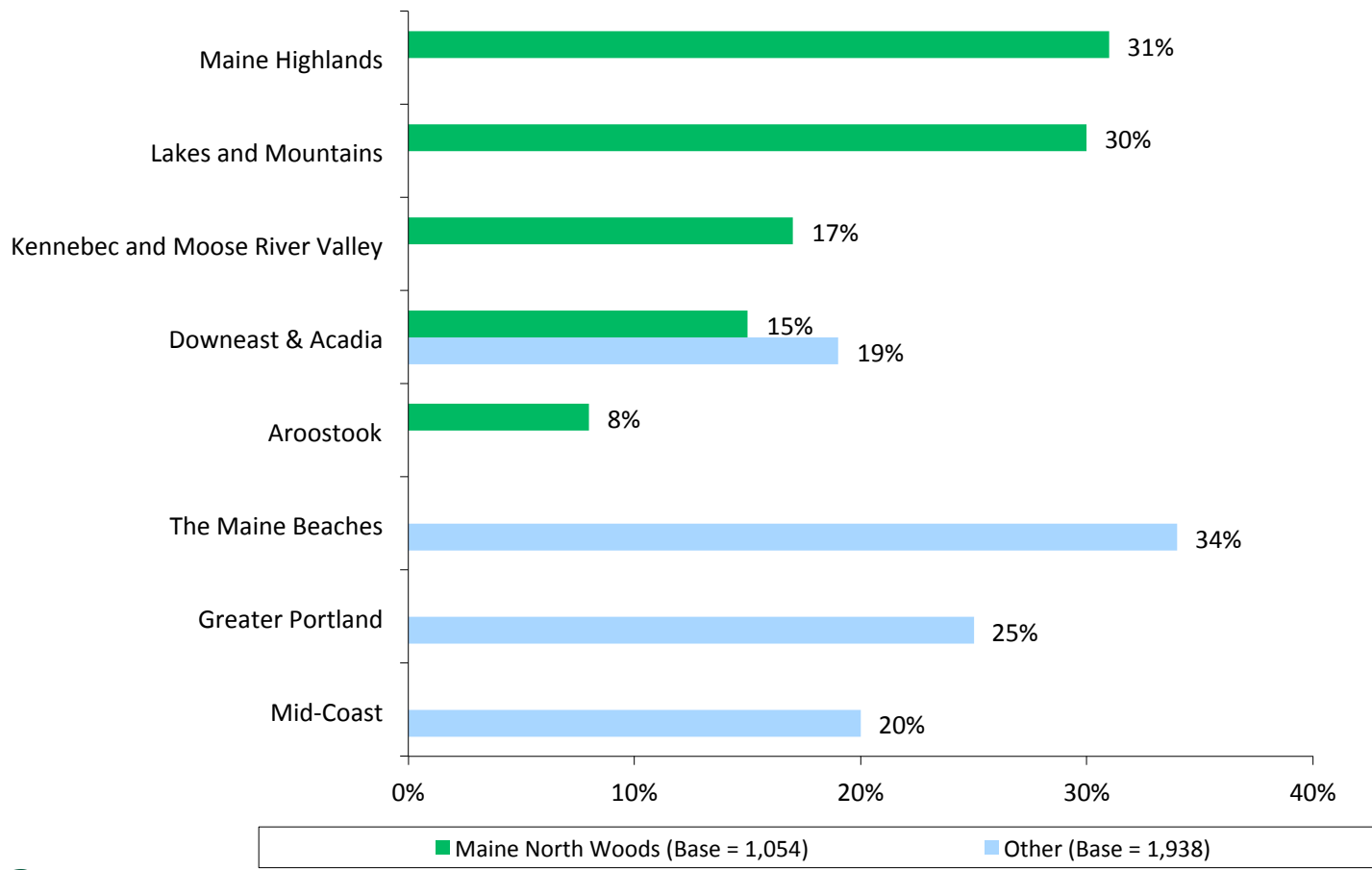
Unpaid Accommodations While in Maine

- Rather, Maine Woods visitors are more likely to stay in a second home/cabin/cottage/condo that they own, or spend time camping while visiting Maine.



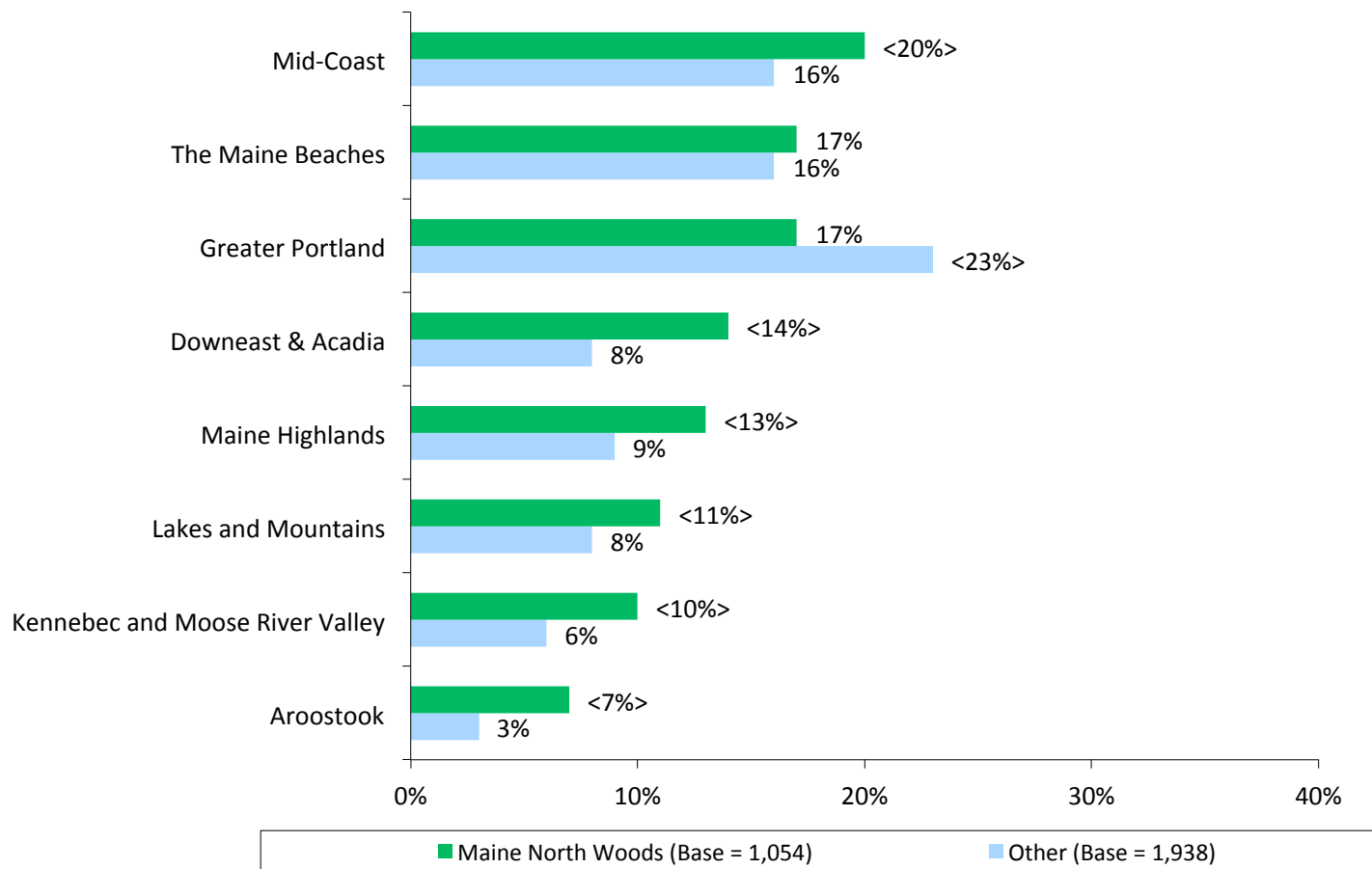
Primary Region of Visit to Maine – Maine Woods *Visitors*

- Maine Woods visitors are most likely to visit the *Maine Highlands* or *Lakes and Mountains* region as the primary destination of their trip.



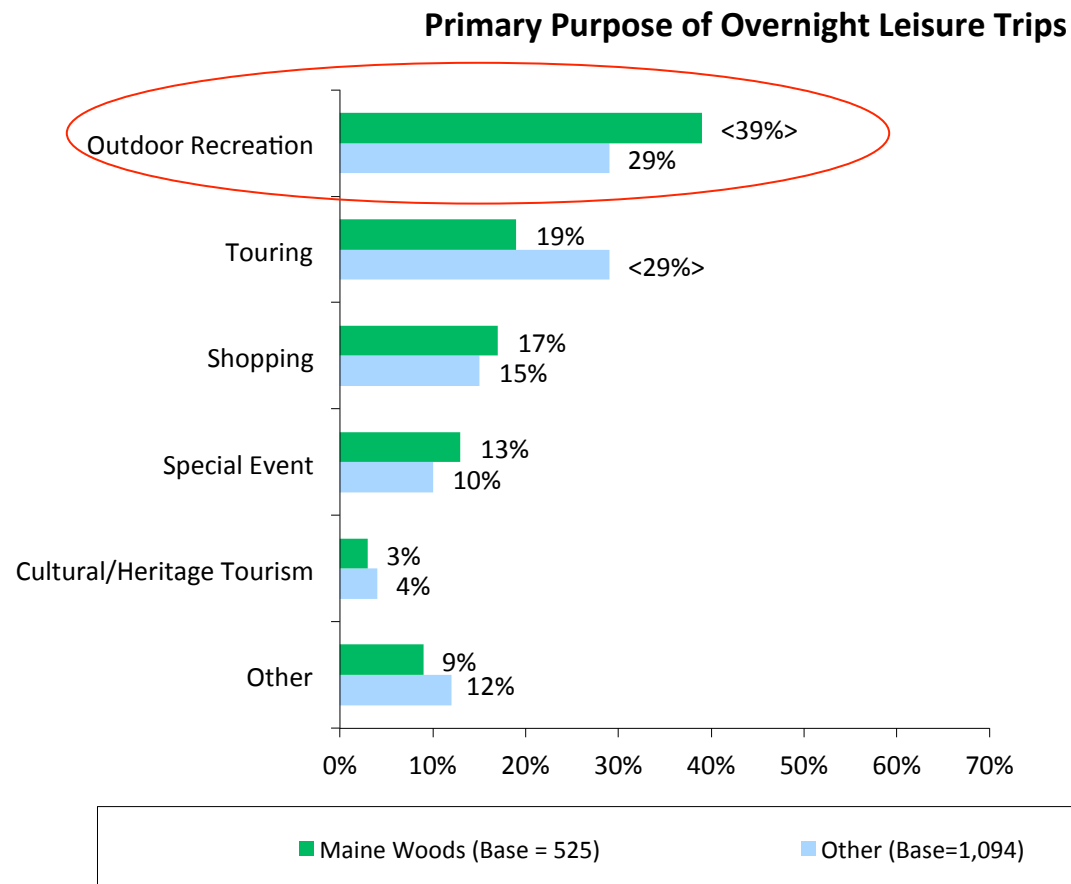
Secondary Region of Visit to Maine – Maine Woods *Visitors*

- Interestingly, Maine Woods visitors are more likely to visit a variety of other regions while enjoying their travels in Maine. Exceptions are Greater Portland, which is visited by a greater portion of visitors whose primary region of visitation is coastal, and The Maine Beaches which is an equally popular secondary destination for all Maine visitors.



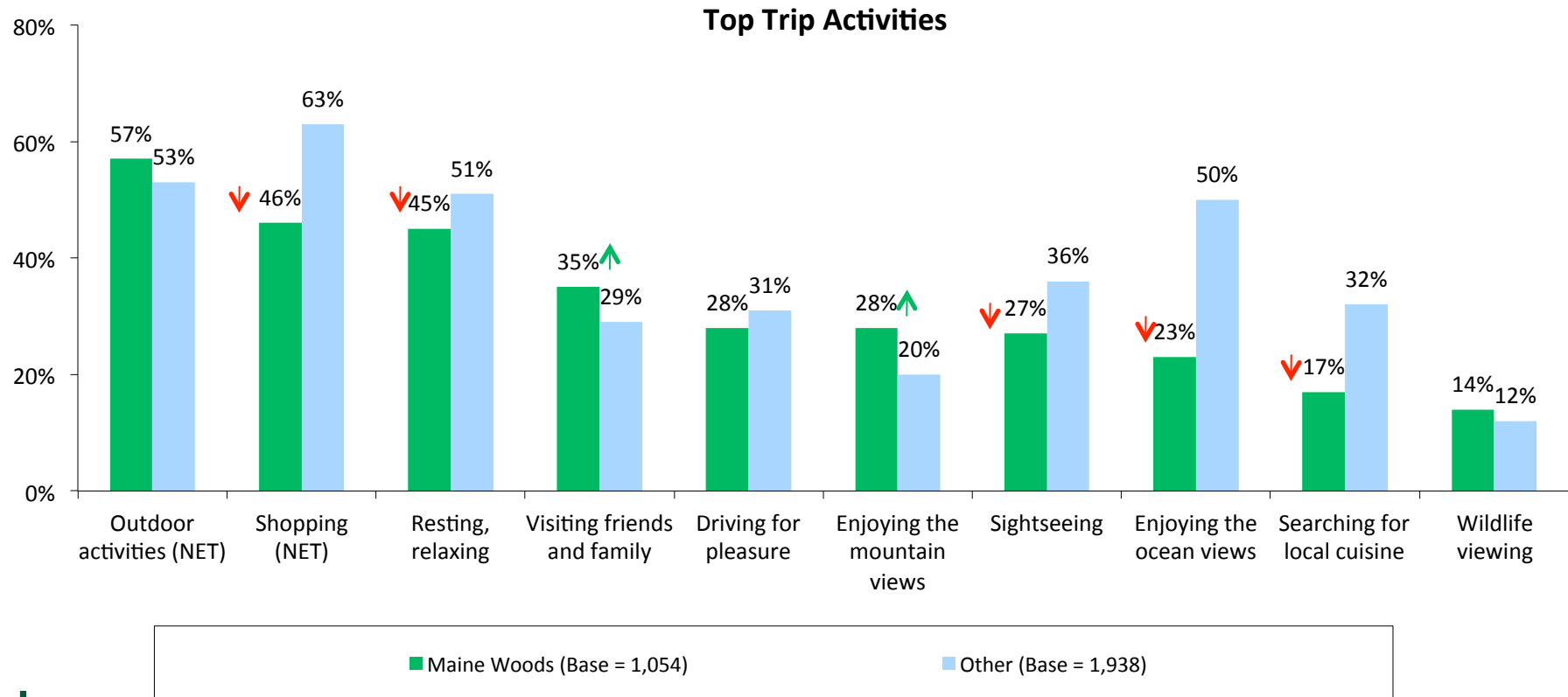
Primary Purpose of Overnight Leisure Trips

- Those visiting the Maine Woods are more likely to be visiting Maine to take advantage of outdoor recreation opportunities. Those visiting other regions are more likely to consider the primary reason for their trip to be a touring vacation.



Overnight Leisure Trip Activities

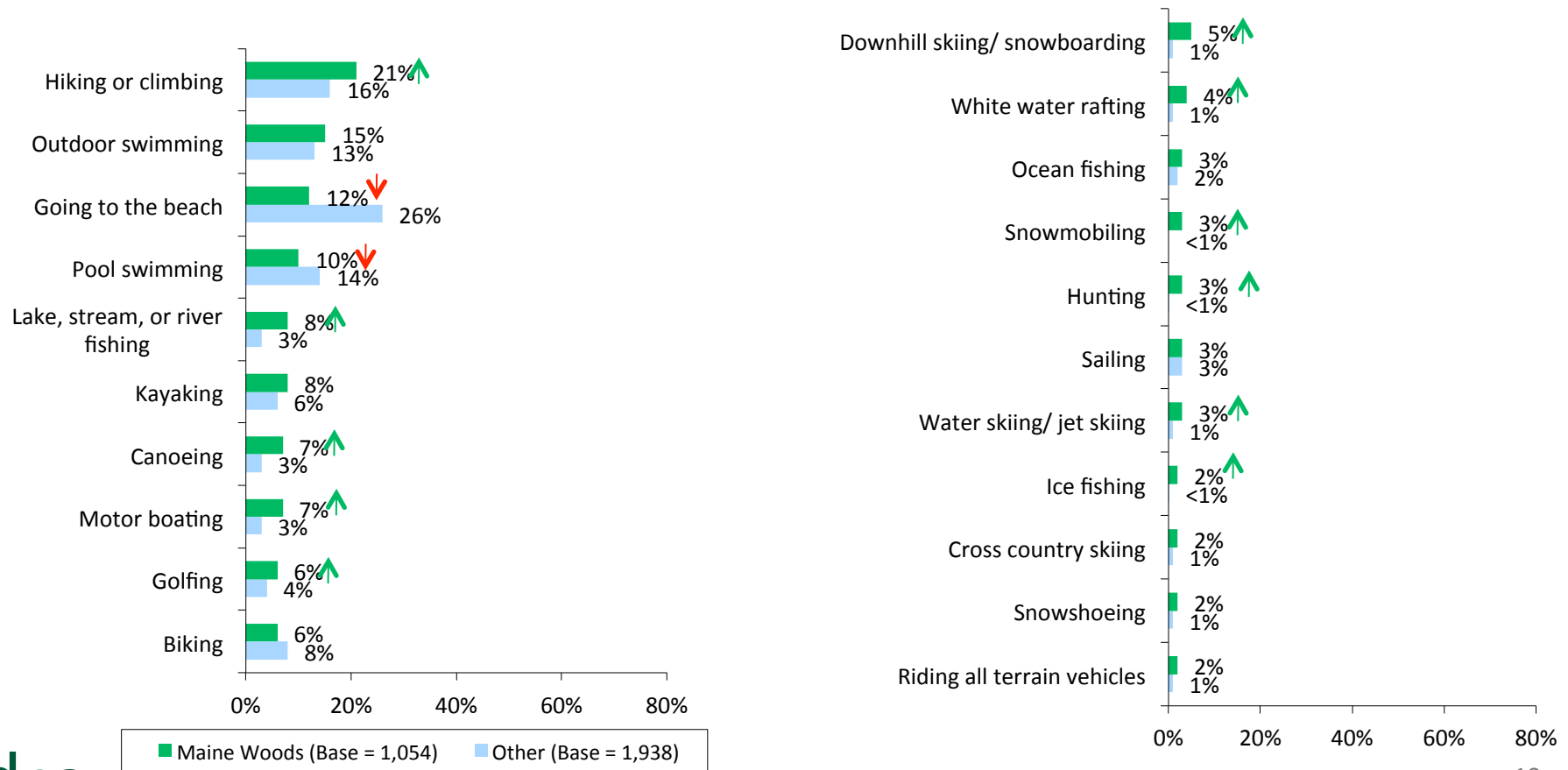
- Maine Woods visitors are more likely to spend time on their trip visiting with friends or family, and enjoying the mountain views.
- They are less likely to spend time shopping, resting/relaxing, enjoying the ocean views, or searching for local cuisine. Their trips tend to be more active, and focused on activity and quality time with others.



Overnight Leisure Trip Activities

- Maine Woods visitors like to take advantage of Maine’s numerous outdoor activity opportunities. Not surprisingly, they are less likely than coastal visitors to go to the beach or swim in pools.

Top Trip Activities – Outdoor Activities



Overnight & Day Visitor Spending

- Overall, when comparing Maine Woods visitors to those seeking other areas of Maine, per trip spending is quite similar.
- However, Maine Woods overnight visitors tend to spend more on recreation in particular, not surprising given the focus of their trips on activities.

2010 Overnight Travel Spending		
	Maine Woods	Other
Net Spending	\$641	\$678
Spending by Category:		
Lodging*	\$170	\$220
Transportation*	\$100	\$75
Food*	\$150	\$195
Retail Goods**	\$170	\$155
Recreation**	\$51 ↑	\$33

2010 Day Travel Spending		
	Maine Woods	Other
Net Spending	\$174	\$177
Spending by Category:		
Lodging*	NA	NA
Transportation*	\$40	\$30
Food*	\$40	\$50
Retail Goods**	\$80	\$84
Recreation**	\$14	\$14

**Medians include zero without outliers*

*** Means including zero without outliers*

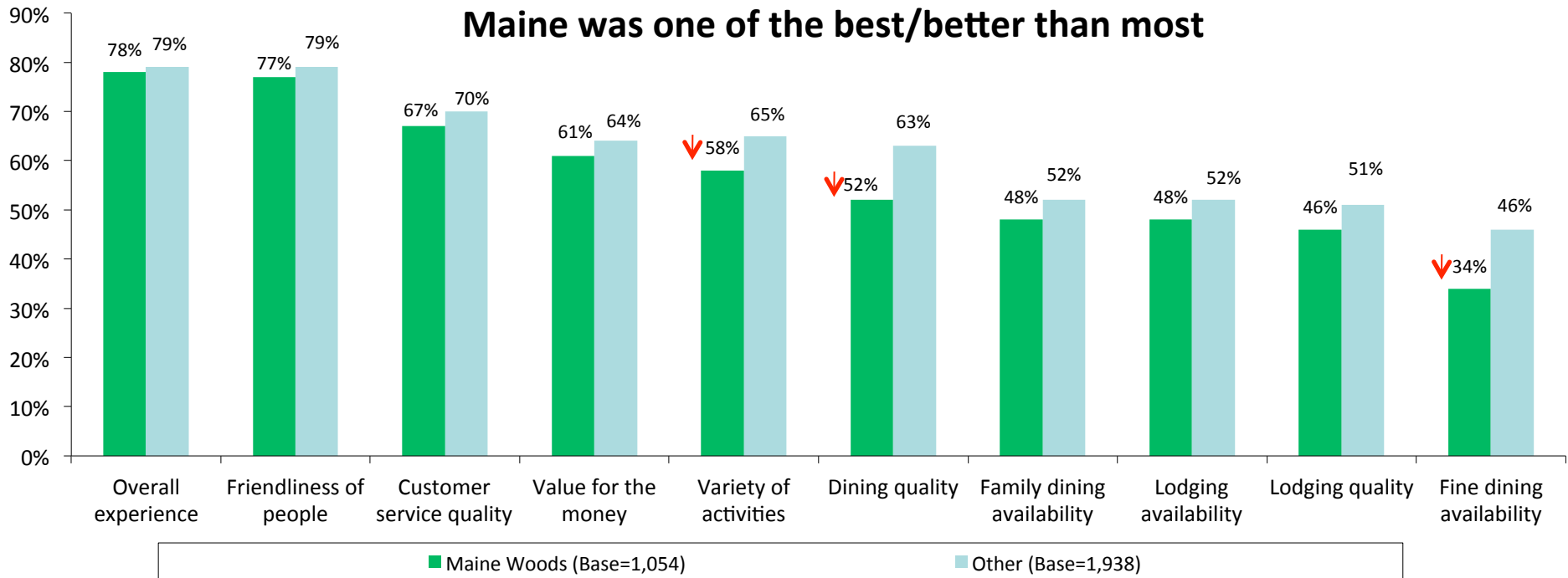
Regional Q33 & Day Q14. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of 20 the following categories below.

↑↓ *notes significant difference at 95% confidence level*

Comparison of Maine to Other Destinations

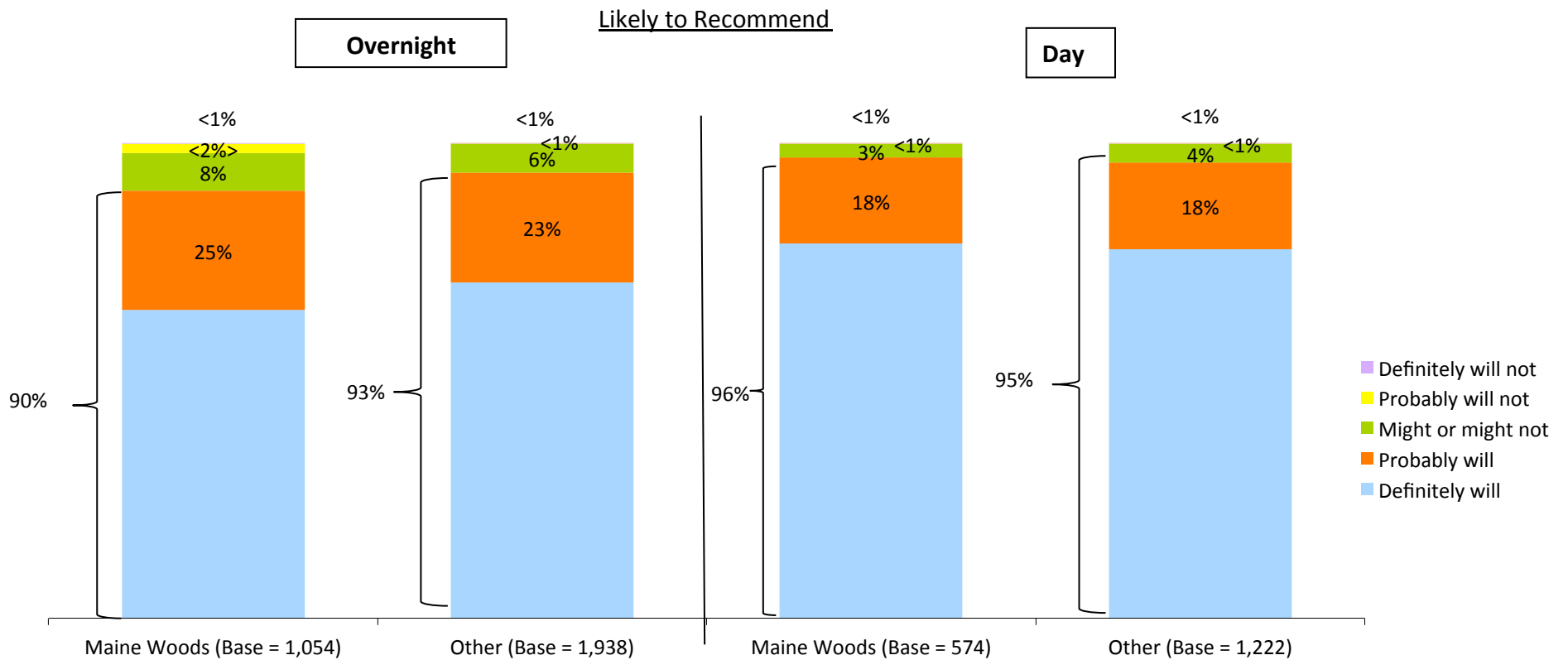
- Significant differences are particularly evident in visitors’ perceptions of Maine’s dining, with Maine Woods visitors rating Maine lower for both *quality* and *availability of fine dining*.
- Additionally, Maine Woods visitors are less likely to rank Maine highly for *variety of activities*, despite already high engagement of these travelers, they may be seeking even more to do.

Top Two Box Summary: Maine was one of the best/better than most



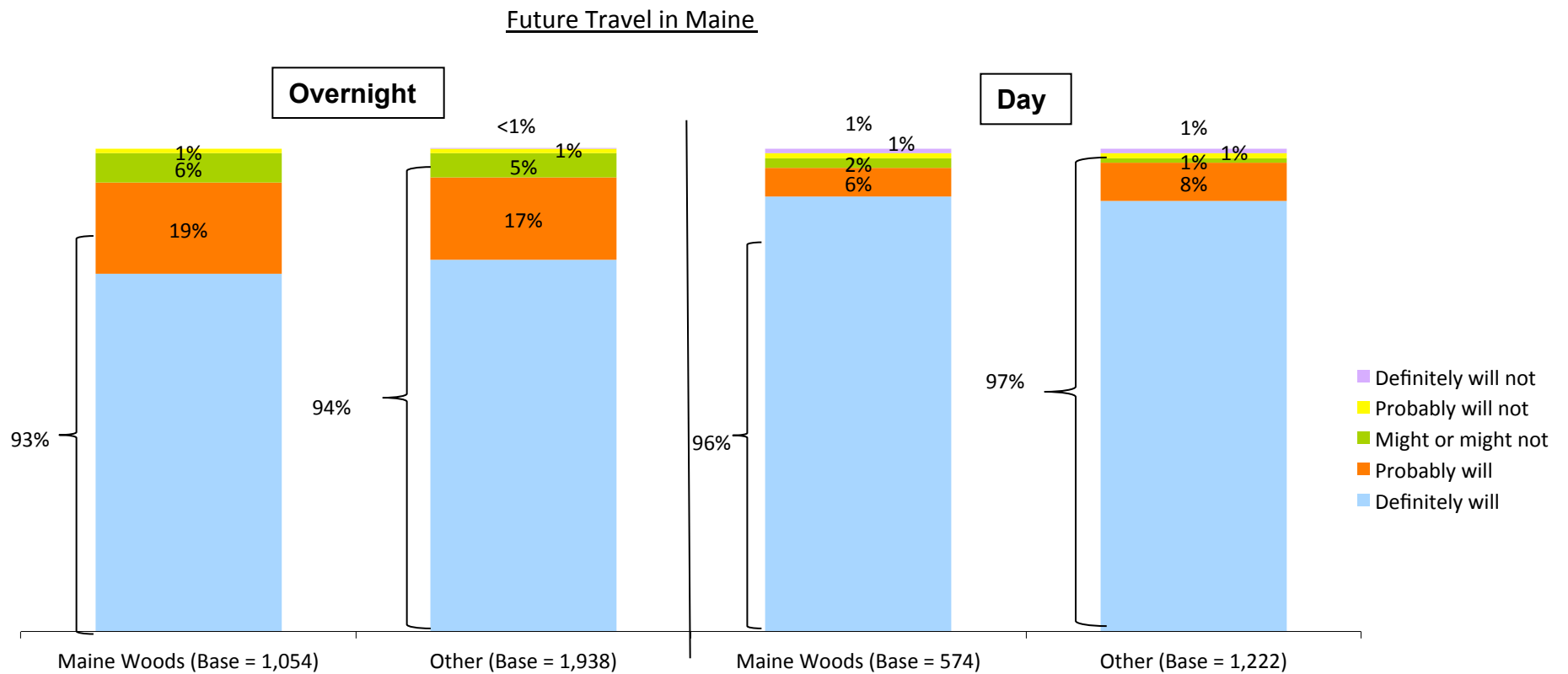
Likelihood to Recommend Maine

- Likelihood to recommend Maine is strong among all visitors to the state. Overnight Maine Woods visitors are somewhat less likely to definitely recommend Maine to friends and relatives, but still nine out of ten rate their likelihood to recommend as top two box.



Future Travel in Maine

- All Maine visitors report a high likelihood of future travel in Maine. Importantly, Maine Woods visitors, despite a higher proportion of first time visitors, are just as likely to plan a return trip to Maine as visitors to other parts of the state.



Summary

- About one out of every three Maine visitors primary destination on their trip to Maine is within the Maine Woods regions of Maine. These visitors tend to be younger than visitors to other parts of Maine, with slightly lower income.
- They tend to be more frequent travelers, in particular they take more VFR and business trips. The VFR travel is noteworthy, as these travelers tend to be engaged with friends and family on their trips to Maine.
- They also are engaged in specific outdoor activities to a greater degree than their coastal counterparts. Their trips seem to be about people and activities, and the Maine Woods provides the right atmosphere to enjoy time with their friends, and engaging in the activities they love.
- Maine Woods visitors tend to give the state lower ratings for its dining, as well as lower ratings for its breadth of activities despite being a more activity-engaged group.
- Overall spending is similar across both groups of travelers, with Maine Woods visitors spending a bit less on lodging and food, but more on retail shopping, transportation, and recreation.
- Importantly, Maine Woods visitors are more likely to be first time visitors to Maine than coastal visitors. This suggests that the Maine Woods can be an avenue to introduce younger visitors to the state, feeding the funnel of future visitation. In fact, repeat visitors to the Maine Woods are among Maine's most frequent and loyal visitors.



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