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## **2013 Maine Lodging Study**

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# 2013 Maine Lodging Study

*Prepared by*



June 2013



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# Introduction and Methodology



# Background

- The Maine Office of Tourism commissioned DPA, a division of Digital Research, Inc., to conduct research to establish benchmarks for Maine's lodging industry. Going forward, these benchmarks will be used to monitor the health of the tourism industry in Maine.
- This is the first wave of this lodging study, and it is anticipated that the study will be repeated regularly, on a semi-annual or annual basis.
- The study gathered the following data from Maine's lodging properties:
  - Property type , size, and seasonality,
  - Occupancy rates,
  - Average daily rates,
  - Average party size,
  - Average length of stay,
  - Origin of visitors, and
  - Reservation methods.

# Methodology

- The Maine Lodging Survey was conducted by telephone, with participating properties being given the opportunity to complete the survey online if they preferred. A very small percentage of participating properties selected this option, with most completing the interview over the telephone.
- The Maine Office of Tourism provided the database of lodging properties used for their website, VisitMaine.com. In total 1,722 properties were included in this database. 224 of the properties listed were unable to be reached due to disconnected numbers. A total of 419 properties participated in this study.
  - 387 completed the survey over the telephone, and
  - 32 completed the survey online.
- Interviews were conducted between April 22 and May 23, 2013.

# Reporting and Sampling Notes

- Throughout this report, the following abbreviations will be used when discussing the various types of lodging properties:
  - HMR = Hotel, Motel, or Resort
  - I/BB = Inn or Bed & Breakfast
  - CCC = Condo, Cottage, Cabin, Sporting Camp, or Timeshare
  - RV/CG = RV Park, Campground, or Trailer Park
- Data was gathered for three separate seasons during the year, defined as follows:
  - Winter = December – April
  - Summer = May – August
  - Fall = September – November
- The sample of RV Park/Campground/Trailer Park properties in this study includes only 49 participating properties. In addition, due to the seasonality of this type of lodging, data for the Winter seasons is based on *extremely small* sample sizes of open/responding properties. **Please use caution when interpreting data for this group.**

# Maine Lodging Study

## Profile of Responding Properties

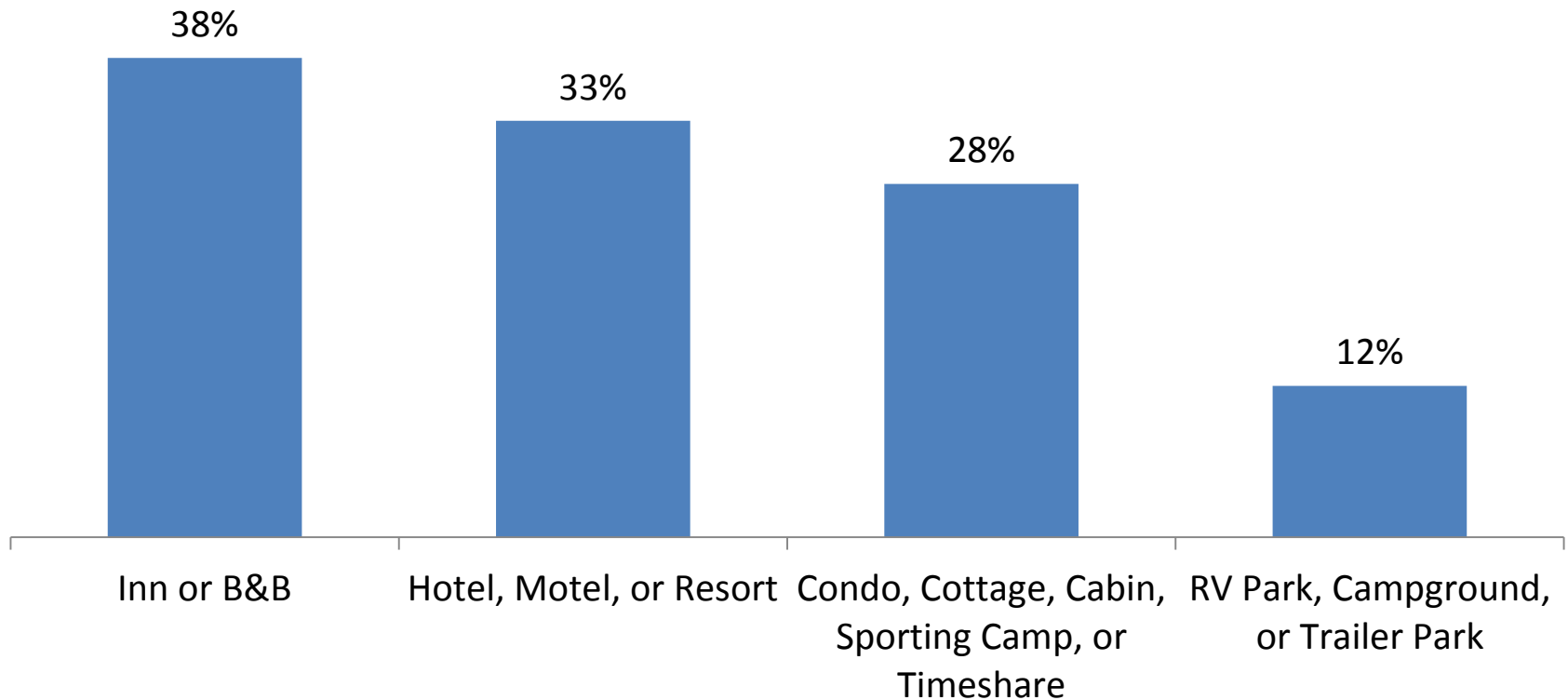




# Type of Lodging Properties

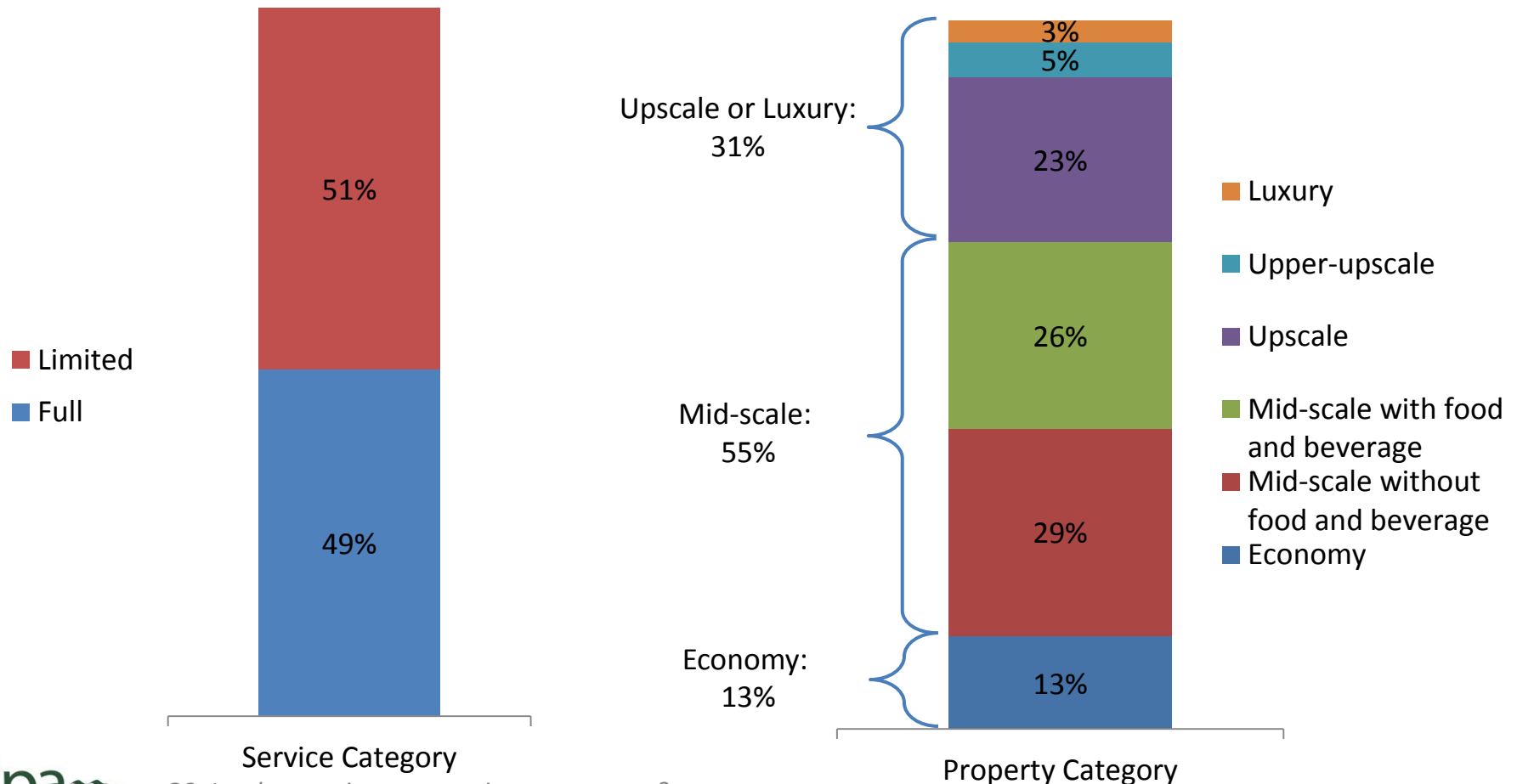
Of the responding lodging properties, nearly three-fourths are either inns/bed & breakfast properties (38%) or hotels/motels/resorts (33%). Slightly fewer (28%) categorize themselves as either a condo, cottage, cabin, sporting camp, or timeshare.

**Type of Lodging Properties  
(n=419)**



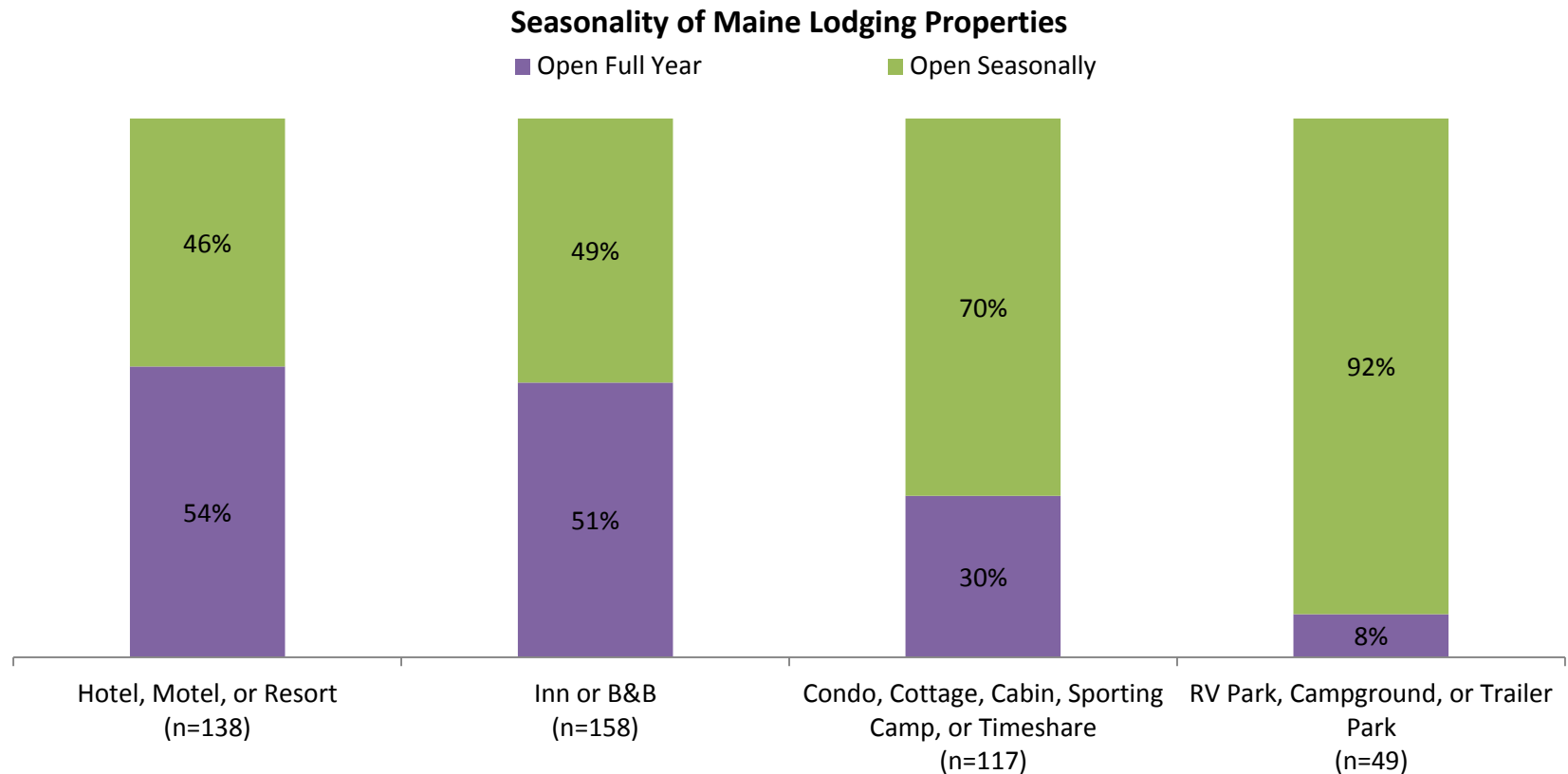
# Hotel/Motel/Resort Category Types

- When asked to define in which service category their property is categorized, responding HMR properties are evenly split between full-service and limited-service properties.
- As for property categories, most are categorized as mid-scale, either with or without food and beverage. Nearly one-third of responding HMR properties in Maine are upscale or luxury properties.



# Seasonality of Lodging Properties

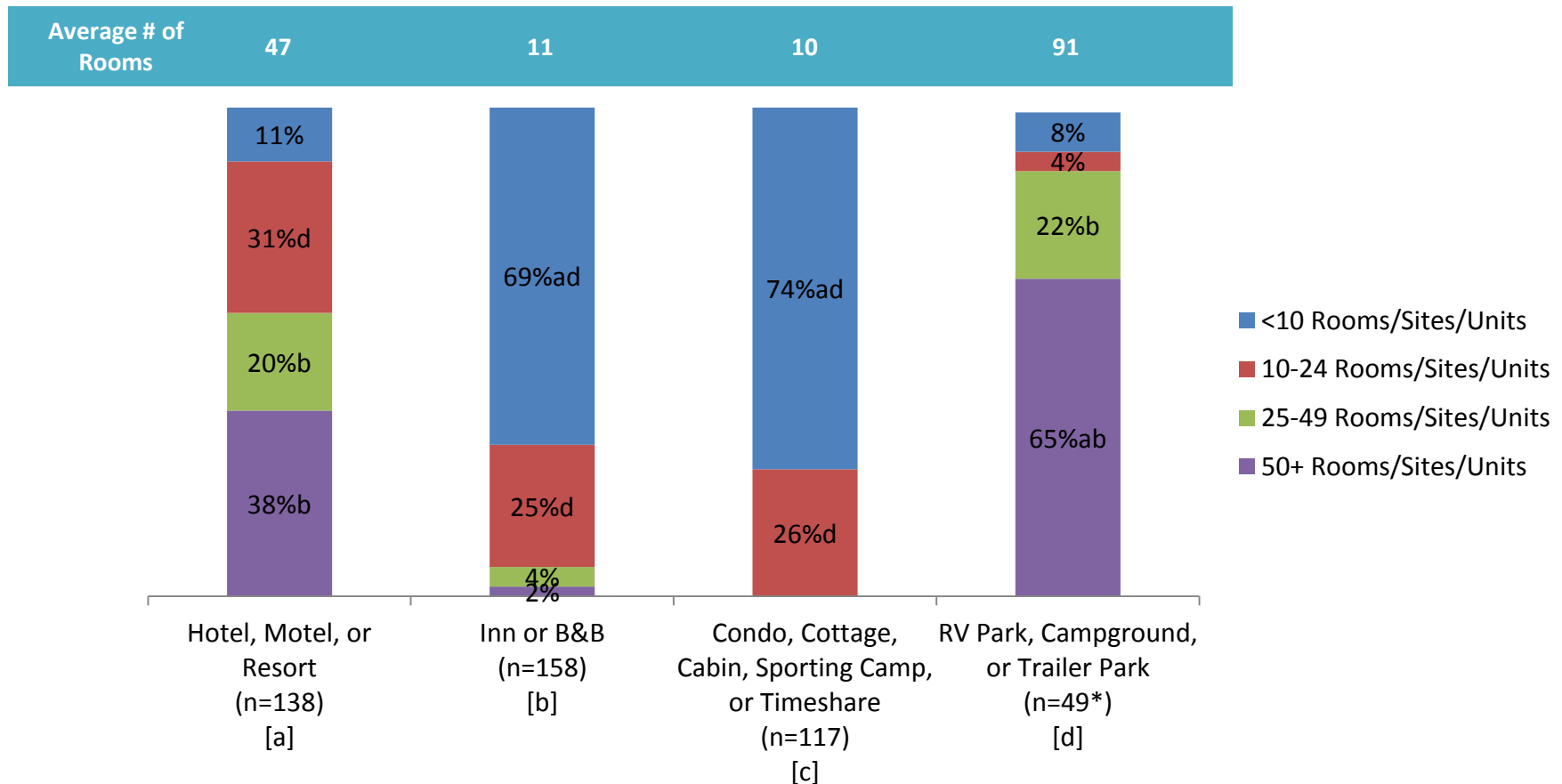
HMR and I/BB properties surveyed are split evenly between year-round properties and seasonal properties. The vast majority of RV/CG properties are seasonal, as are a large proportion of CCC properties.



# Size of Lodging Properties

Responding HMR properties have an average of 47 rooms, with 38% having 50 or more rooms. As expected, I/BB and CCC properties have fewer rooms/units available, averaging around 10. RV/CG properties average over 90 available sites.

Size of Maine Lodging Properties

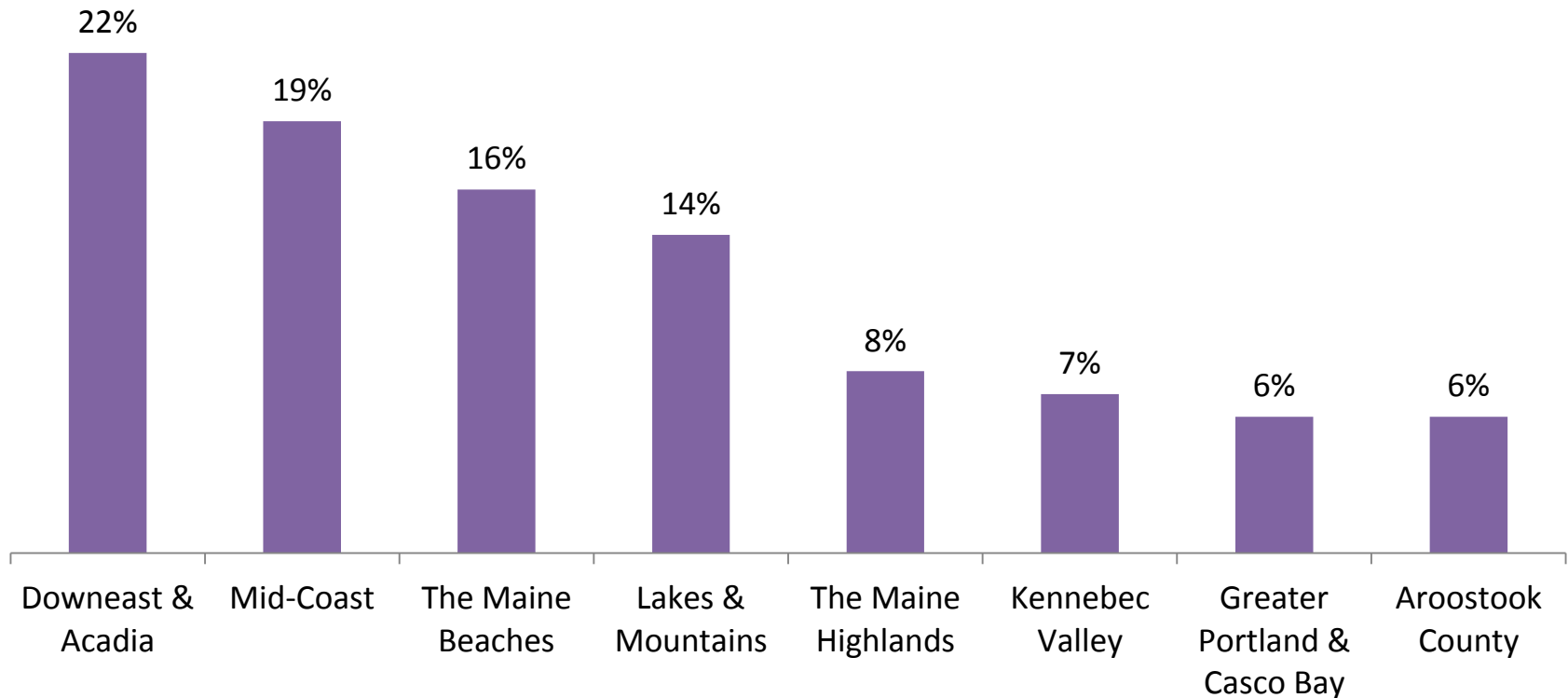


*\*Please note small sample size. Data should be used for directional purposes only. Q6a/b/c. What is the total number of rooms/units/sites on your property?*

# Lodging Properties by Region

One-fifth of participating lodging properties are located in the Downeast & Acadia region or the Mid-Coast region. Aroostook County and the Greater Portland & Casco Bay region supplied the lowest percentage of responding properties.

**Maine Lodging Properties by Region  
(n=419)**



# Maine Lodging Metrics



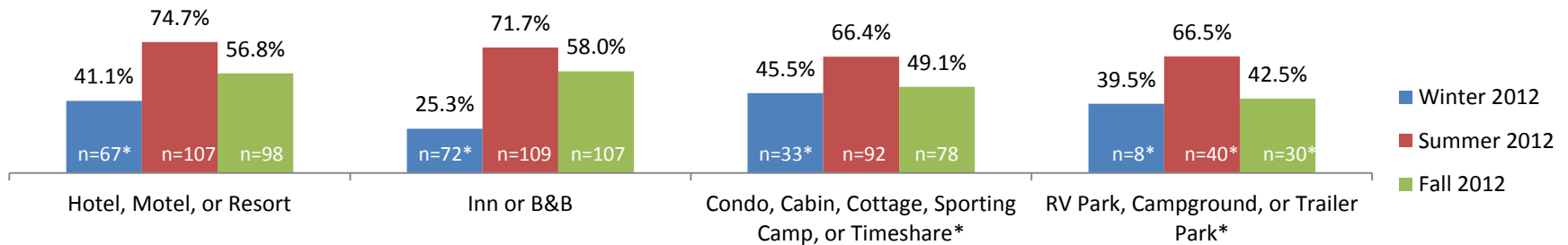
# Note Regarding Data Collection and Sample Sizes

- For data on *occupancy rates, average daily rates, average party size, and average length of stay*, properties were asked to provide information on the most recent season (Winter 2012/2013) and for the prior 2011 and 2012 seasons. For those properties who did not have exact figures for 2011 and 2012, they provided estimates.
- The sample size of responding properties differs by season and by property type due to several properties being open only on a seasonal basis. The number of responding properties is noted on each chart.

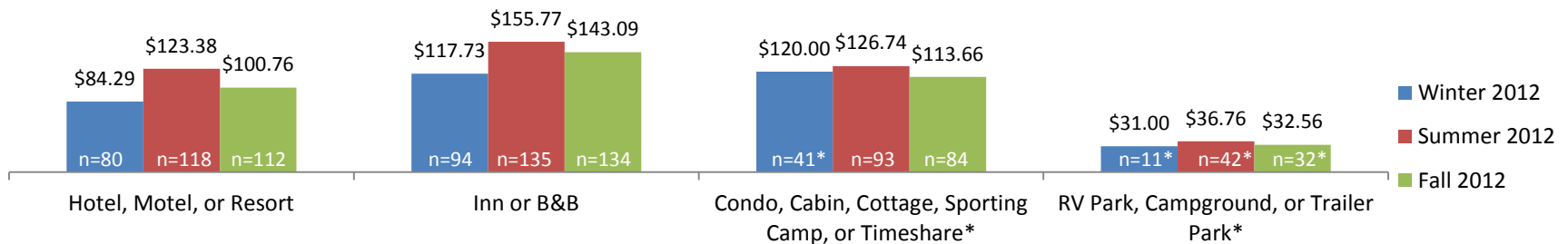
# Occupancy and Daily Rates – 2012

- Not surprisingly, 2012 showed occupancy rates that were highest during the summer months and lowest during the winter months. Summer occupancy rates reached a high of 74.7% for HMR properties.
- Average daily rates followed occupancy rates, with the highest rates seen during the summer months and the lowest rates seen in the winter. The one exception to this was for the CCC properties, where winter rates were higher than fall season rates.

**Average Occupancy Rate**



**Average Daily Rate**



*\*Please note small sample size. Data should be used for directional purposes only.*

Q9. What was your overall average occupancy rate for each of the following time periods?

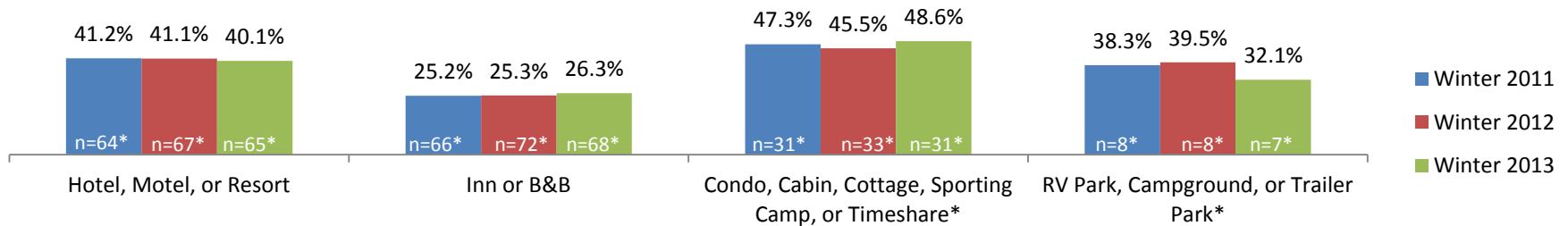
Q10. What was your average daily rate (ADR) for each of the following time periods?



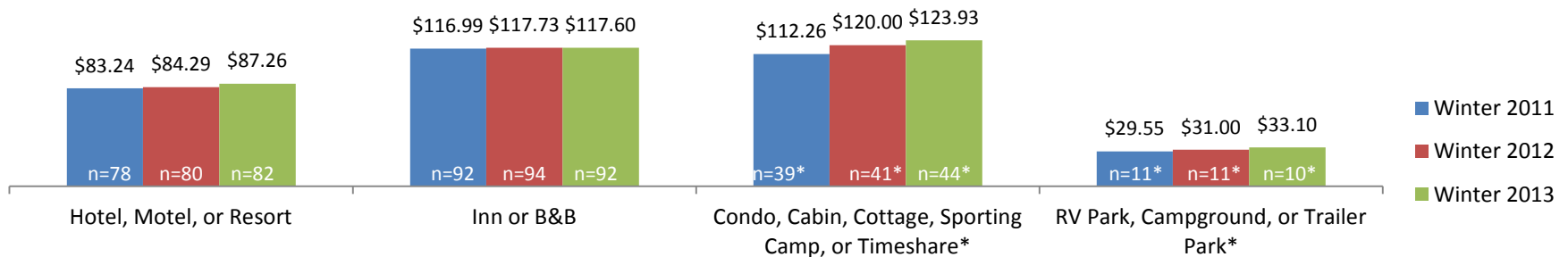
# Occupancy and Daily Rates – Winter

- Winter occupancy rates were relatively stable between 2011 and 2013, with the highest rates seen in the CCC category at nearly 50%. RV/CG properties showed a decrease in occupancy rates between the 2012 winter season and the 2013 winter season. Winter occupancy rates were highest for properties in the Lakes & Mountains region and Aroostook County.
- Average daily rates were highest in the I/BB and CCC categories. All property types showed annual increases in average daily rates between 2011 and 2013, with the exception of I/BB properties whose winter ADRs remained stable over the past three years.

**Average Occupancy Rate**



**Average Daily Rate**



*\*Please note small sample size. Data should be used for directional purposes only.*

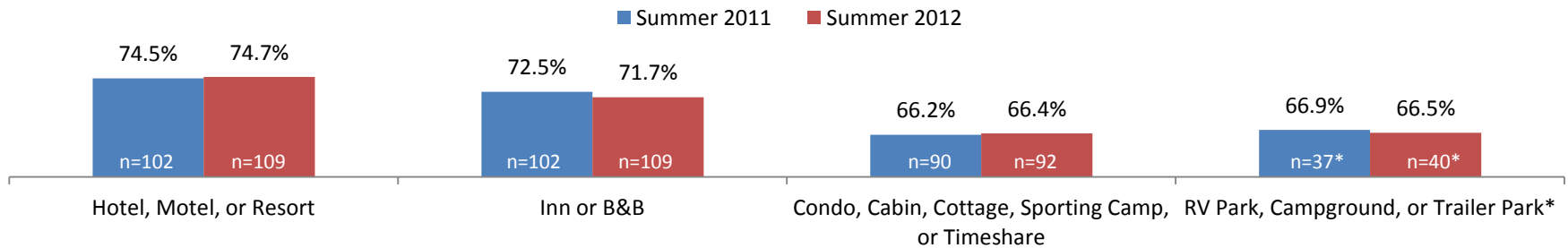
Q9. What was your overall average occupancy rate for each of the following time periods?

Q10. What was your average daily rate (ADR) for each of the following time periods?

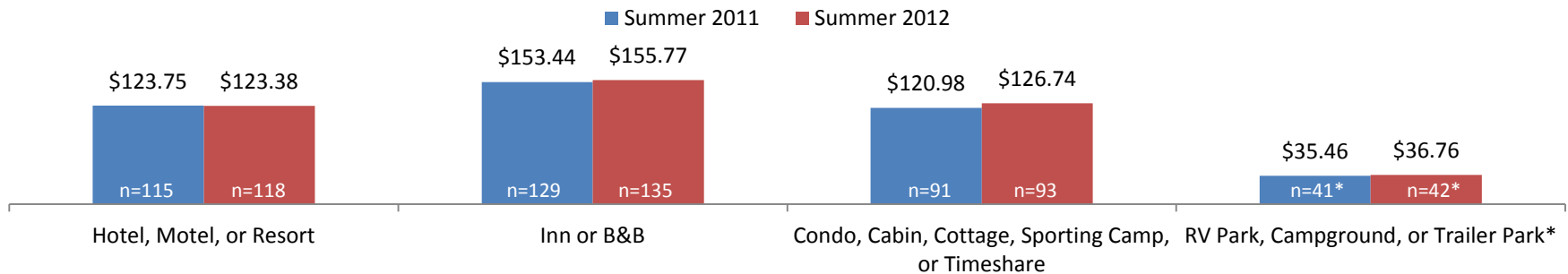
# Occupancy and Daily Rates – Summer

- As mentioned earlier, the summer months experienced the highest occupancy rates, with all property types reporting occupancy rates of at least 65%. HMR and I/BB properties showed the highest summer occupancy rates, as did properties in the Maine Beaches, Greater Portland & Casco Bay, and Downeast & Acadia regions.
- Average daily rates were also highest in the summer, peaking at \$155.77 for I/BB properties during the Summer of 2012.
- Properties in the Maine Beaches region had the highest average daily rates for the summer season, while those in Aroostook County had the lowest average daily rates.

**Average Occupancy Rate**



**Average Daily Rate**



*\*Please note small sample size. Data should be used for directional purposes only.*

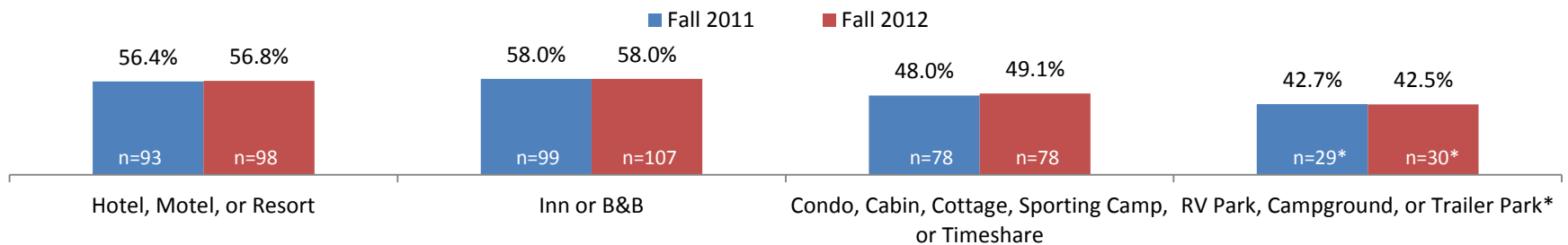
Q9. What was your overall average occupancy rate for each of the following time periods?

Q10. What was your average daily rate (ADR) for each of the following time periods?

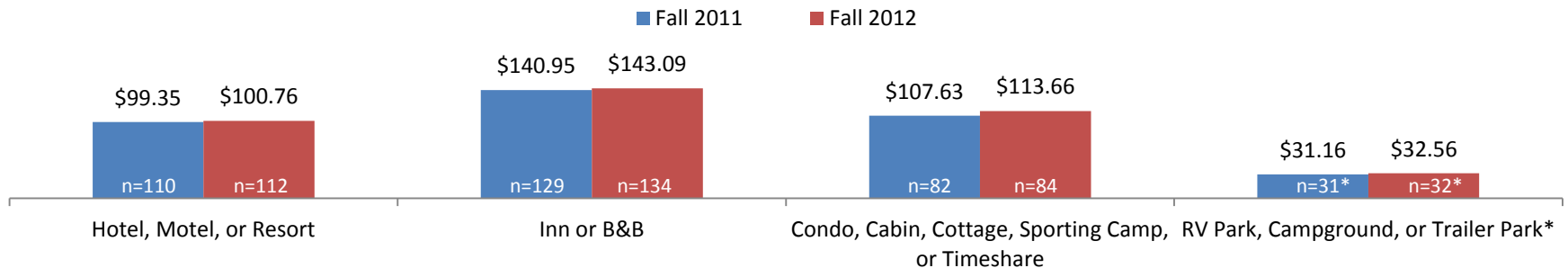
# Occupancy and Daily Rates – Fall

- Occupancy rates during the fall season came in between the high summer season and low winter season rates, with HMR and I/BB properties bringing in occupancy rates above 56% and CCC and RV/CG properties coming in with occupancy rates just under 50%.
- Average daily rates also fell between the high summer rates and low winter rates, with I/BB properties charging a high of \$143.09 during the Fall of 2012. Increases in average daily rates were seen in all property types between Fall 2011 and Fall 2012.

**Average Occupancy Rate**



**Average Daily Rate**



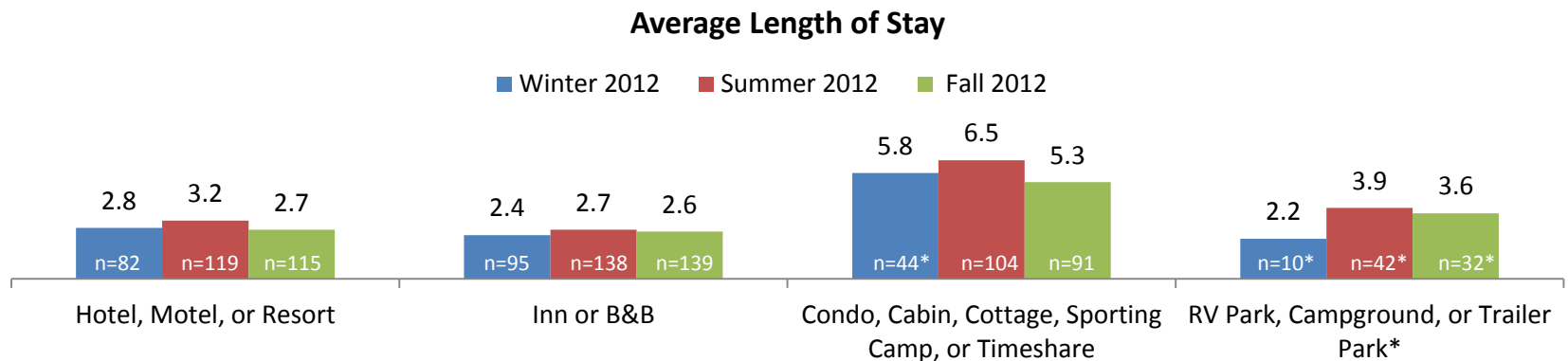
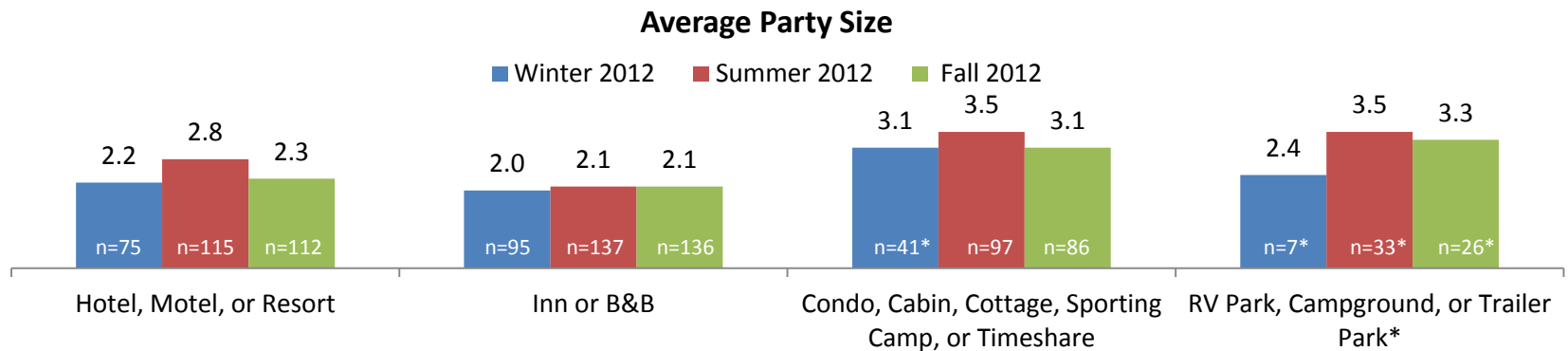
*\*Please note small sample size. Data should be used for directional purposes only.*

Q9. What was your overall average occupancy rate for each of the following time periods?

Q10. What was your average daily rate (ADR) for each of the following time periods?

# Party Size and Length of Stay – 2012

- Average party size in 2012 ranged from a low of 2 people for the I/BB category to a high of 3 to 4 people for the CCC and RV/CG categories. For most categories, the summer season brought in the largest travel parties.
- On average, guests staying in HMR or I/BB properties stayed in Maine for 2 to 3 nights, while those staying in CCC properties stayed for an average of about 6 nights. RV/CG guests were in the middle, staying for between 3 and 4 nights.



*\*Please note small sample size. Data should be used for directional purposes only.*

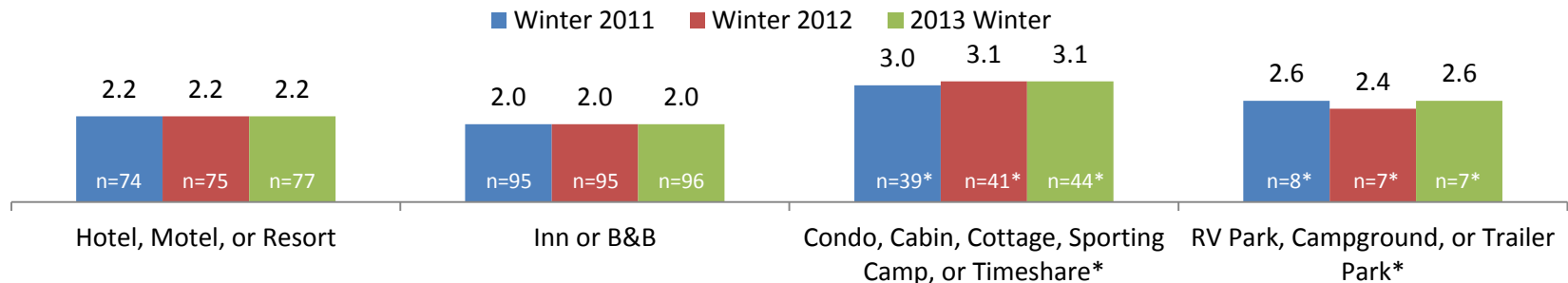
Q11. What is your average number of guests per room in each of the following time periods?

Q12. What is your average length of stay (in nights) of your guests in each of the following time periods?

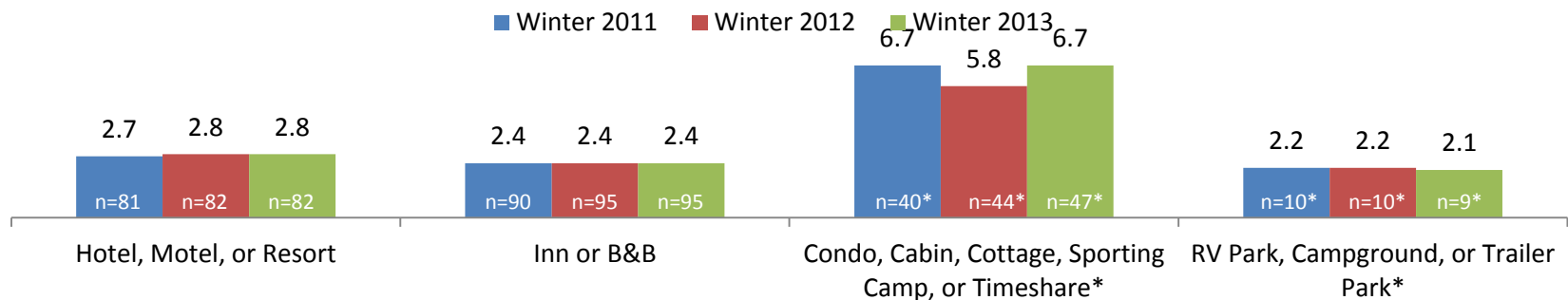
# Party Size and Length of Stay – Winter

- Average party size during the winter months averages around 2 to 3 guests per party, with a low of 2 guests in the I/BB category and 3 guests in the CCC category.
- Average length of stay during the winter months is highest among guests staying in CCC properties (6 to 7 nights) and also among visitors to Aroostook County (4 to 5 nights).

**Average Party Size**



**Average Length of Stay**



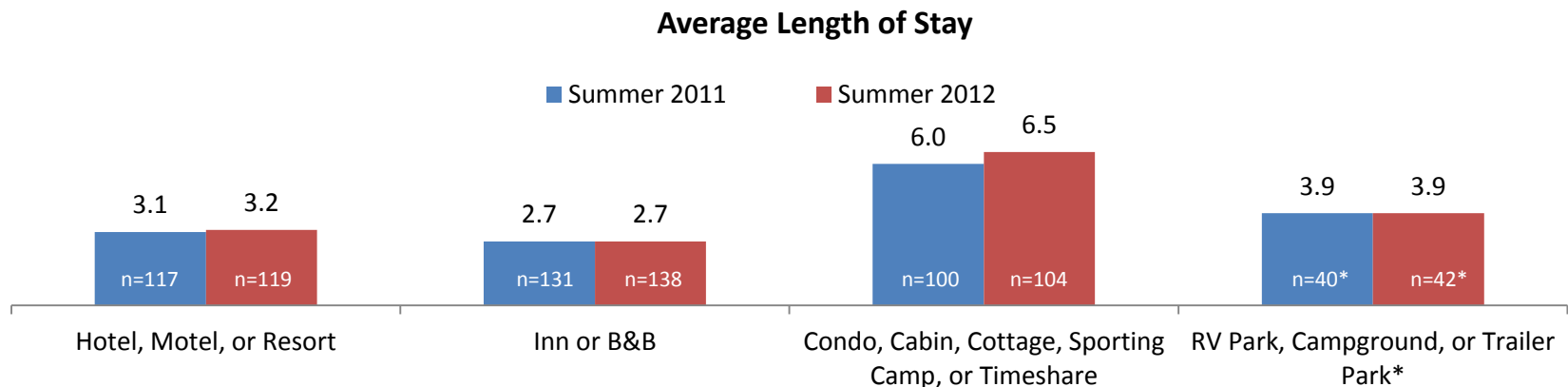
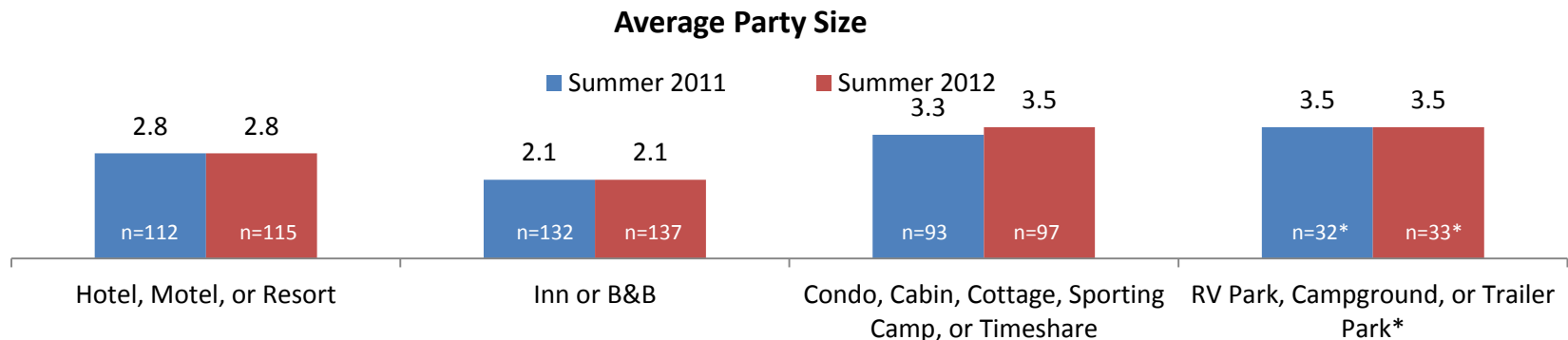
*\*Please note small sample size. Data should be used for directional purposes only.*

Q11. What is your average number of guests per room in each of the following time periods?

Q12. What is your average length of stay (in nights) of your guests in each of the following time periods?

# Party Size and Length of Stay – Summer

- Average party size during the summer months averages between 2 and 4 guests per party, with a low of 2 guests in the I/BB category and closer to 4 guests in the CCC and RV/CG categories.
- Average length of stay during the summer months is highest among guests staying in CCC properties (6 to 7 nights).



*\*Please note small sample size. Data should be used for directional purposes only.*

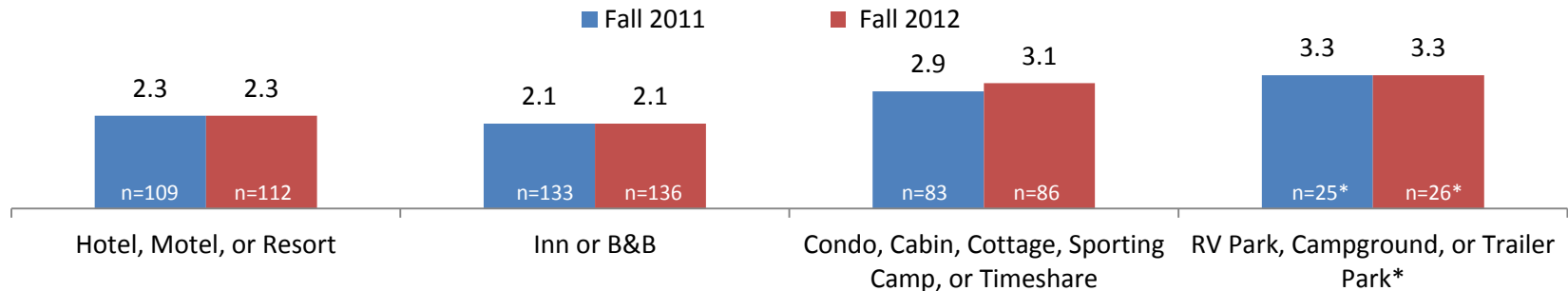
Q11. What is your average number of guests per room in each of the following time periods?

Q12. What is your average length of stay (in nights) of your guests in each of the following time periods?

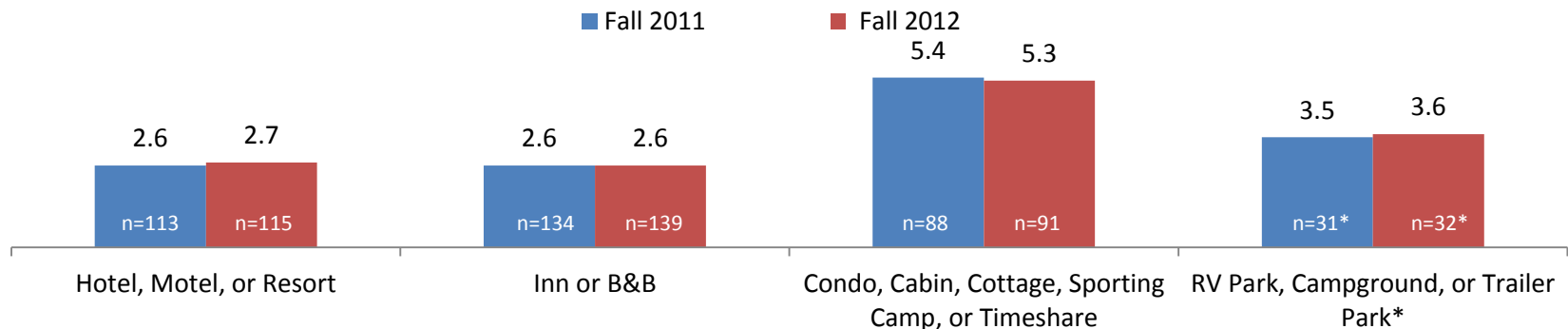
# Party Size and Length of Stay – Fall

- Fall travel parties also average around 2 to 3 people, with a low in the I/BB category and a high in the RV/CG category.
- Similar to winter and summer, average length of stay during the fall months is highest among guests staying in CCC properties (5 nights).

**Average Party Size**



**Average Length of Stay**



*\*Please note small sample size. Data should be used for directional purposes only.*

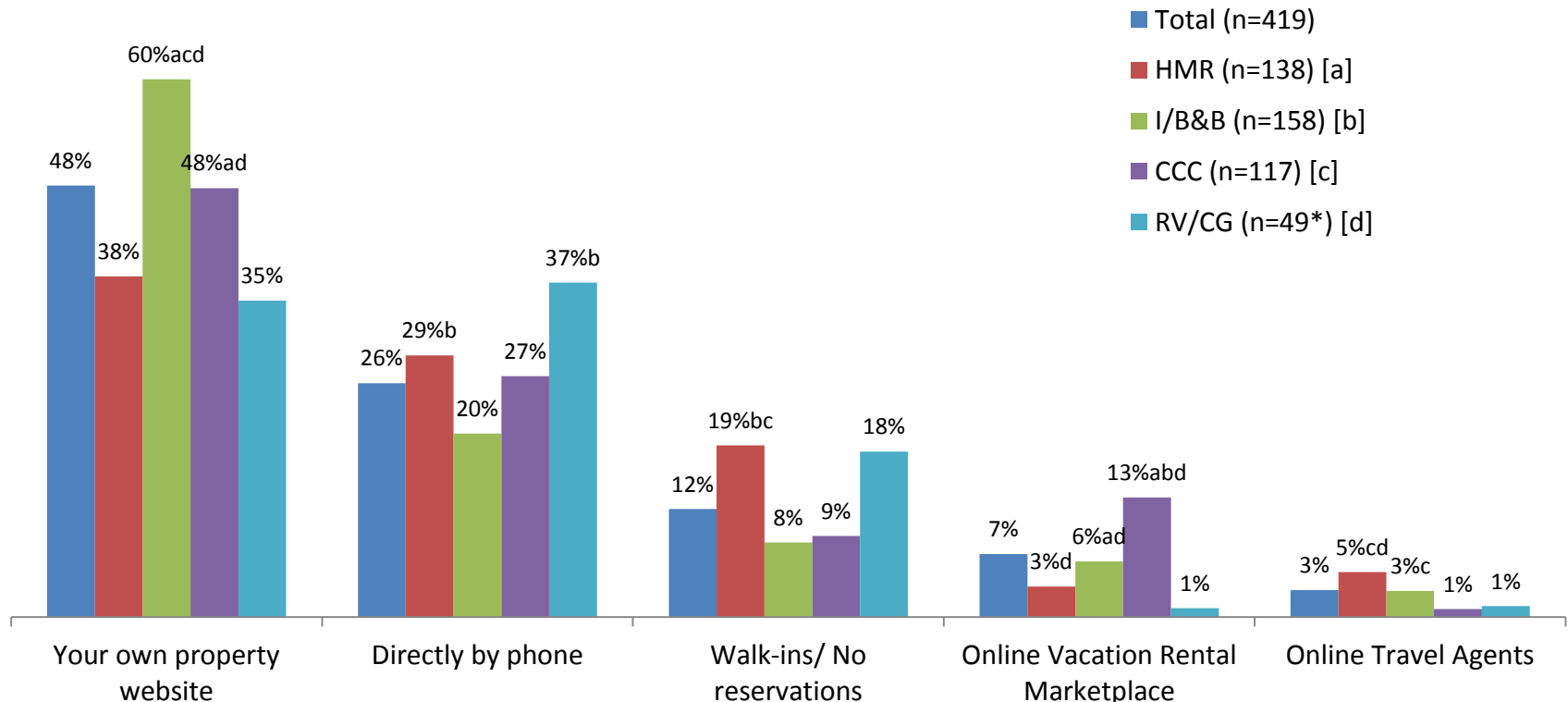
Q11. What is your average number of guests per room in each of the following time periods?

Q12. What is your average length of stay (in nights) of your guests in each of the following time periods?

# Reservation Methods

- For most types of properties, the highest proportion of their reservations is generated through their *own property website*. This is especially true for inn and bed & breakfast properties, where 60% of reservations are generated in this manner. RV Parks and campgrounds have roughly equal proportions of reservations generated *directly by phone* or *through their own property websites*. Though not as significant, one-fifth of stays for HMR and RV/CG properties are generated by *walk-ins without reservations*.

Origin of Lodging Reservations



\*Please note small sample size. Data should be used for directional purposes only.

Q18. Please tell us about the percentage of your reservations that are typically generate through each of the following methods?

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



# Reservation Methods by Region

- When looking at the reservation methods most commonly used by responding properties, some differences can be seen based on in which region the properties are located. For example, properties in the Downeast & Acadia tourism region have a higher proportion of reservations coming through online vacation rental marketplaces than any of the other regions (except Aroostook). Other significant differences can be seen in the table below.
- Sample sizes for some of the individual regions are quite low, so data should be viewed with caution.

	Total (n=419)	The Maine Beaches (n=67*) [a]	Lakes and Mountains (n=58*) [b]	Kennebec Valley (n=25*) [c]	The Maine Highlands (n=33*) [d]	Greater Portland & Casco Bay (n=22*) [e]	Mid-Coast (n=77) [f]	Downeast & Acadia (n=93) [g]	Aroostook County (n=26*) [h]
Your own property website	48%	44%	56%a	46%	43%	55%	57%adgh	45%	42%
Directly by phone	26%	31%efg	25%	29%	32%e	17%	22%	21%	29%
Walk-ins/ No reservations	12%	13%	12%	11%	11%	10%	12%	11%	17%
Online Vacation Rental Marketplace	7%	5%	2%	5%	7%	3%	4%	14%abcdef	8%
Online Travel Agents	3%	5%b	1%	3%	2%	6%bdg	4%b	2%	2%

*\*Please note small sample size. Data should be used for directional purposes only.*

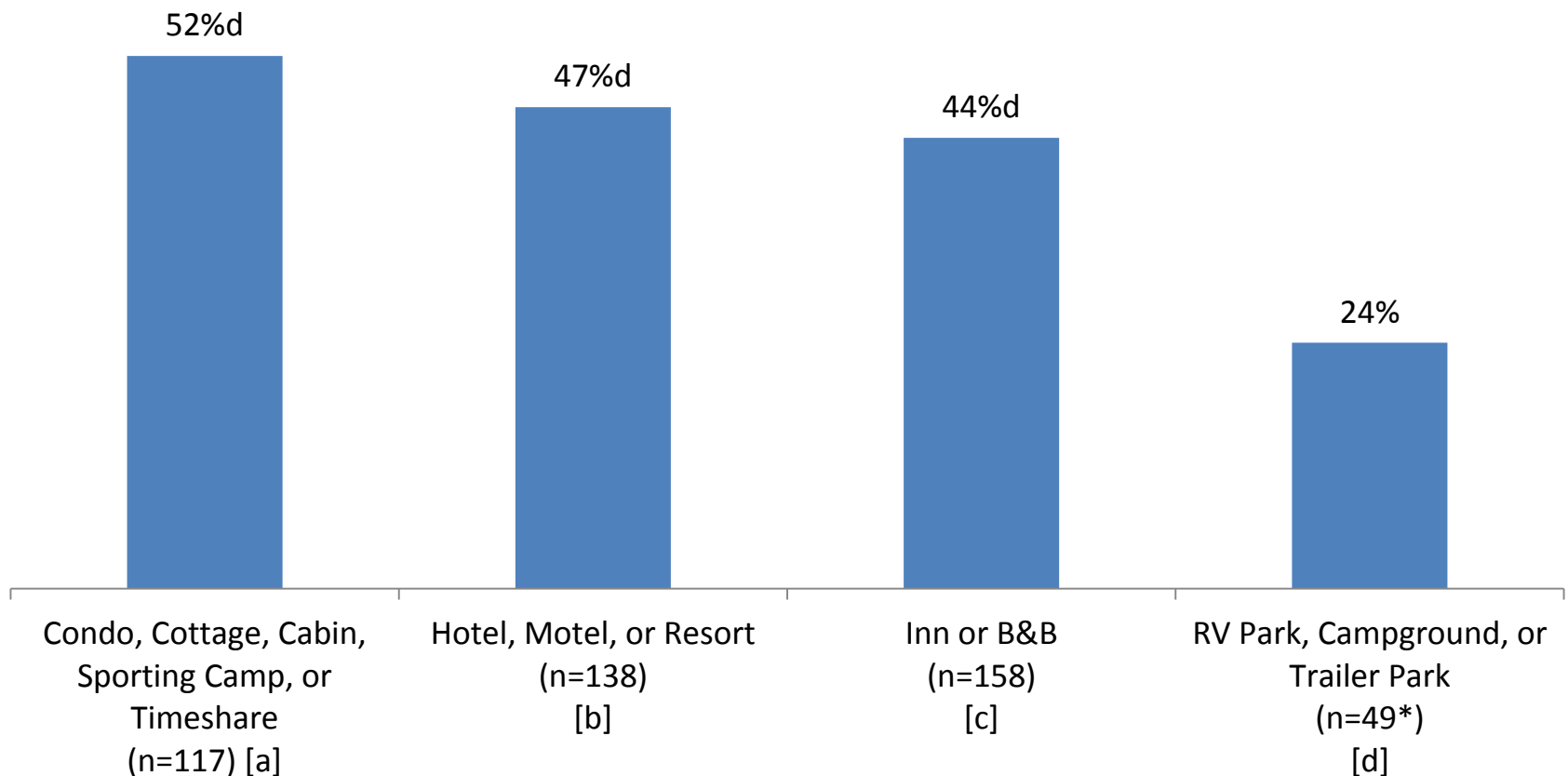
*Q18. Please tell us about the percentage of your reservations that are typically generate through each of the following methods? Total must equal 100%*

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

# Preferential Booking

- Half of the responding CCC properties offer preferential booking for their return guests, as do almost half of HMR and I/BB properties. Preferential booking is less likely to be offered by RV/CG properties, though still offered by one-fourth of these properties.
- Properties located in the Kennebec Valley tourism region are least likely to offer preferential booking for return guests.

## Offers Preferential Booking for Return Guests



*\*Please note small sample size. Data should be used for directional purposes only.*

*Q19. Does your property offer any preferential booking for return guests?*

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

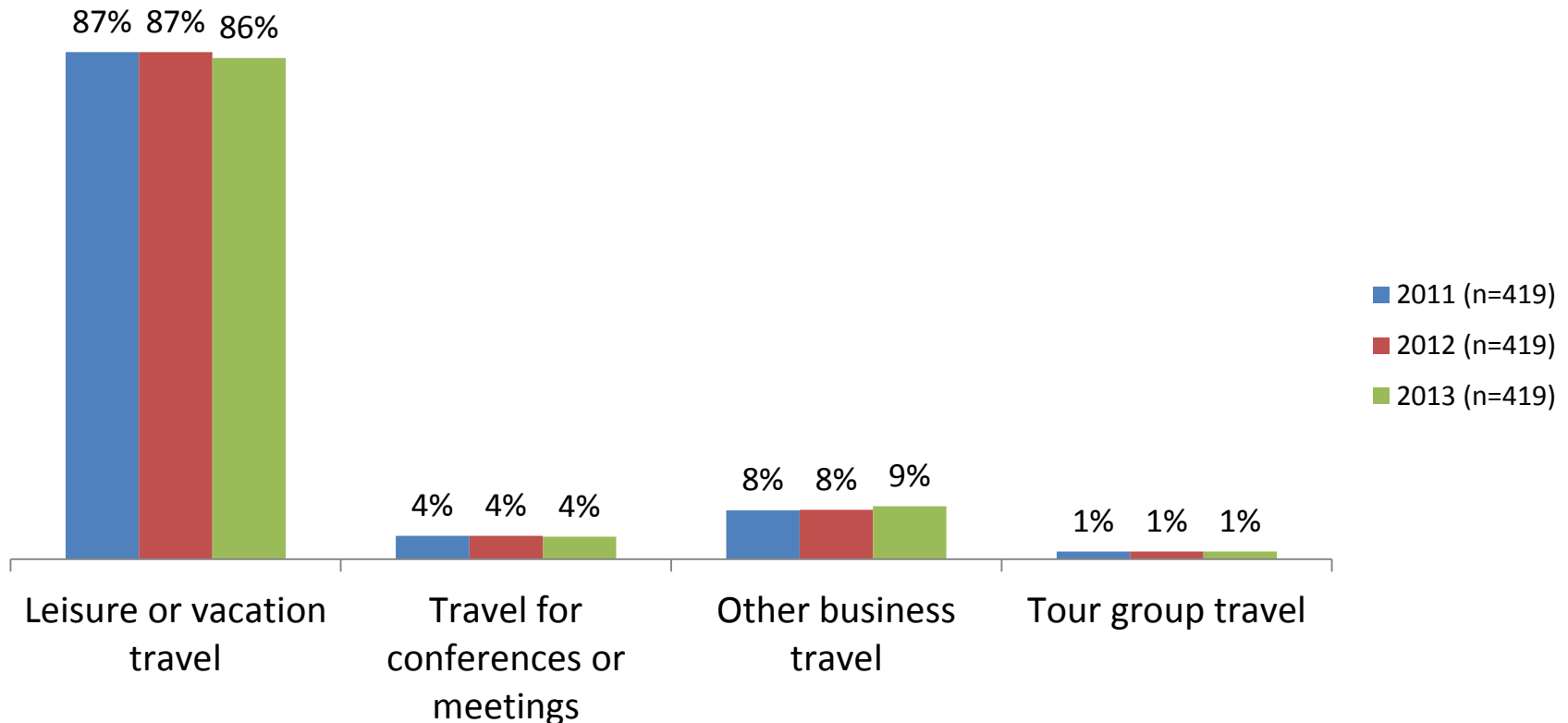
# Maine Lodging Guest Metrics



# Types of Travel

Responding properties report that nearly 90% of their annual occupancy is generated by vacation or leisure travelers. Just over 10% is generated by business travelers. Between 2011 and 2013, there are no reported changes in the percentage of occupancy generated by the various types of travelers.

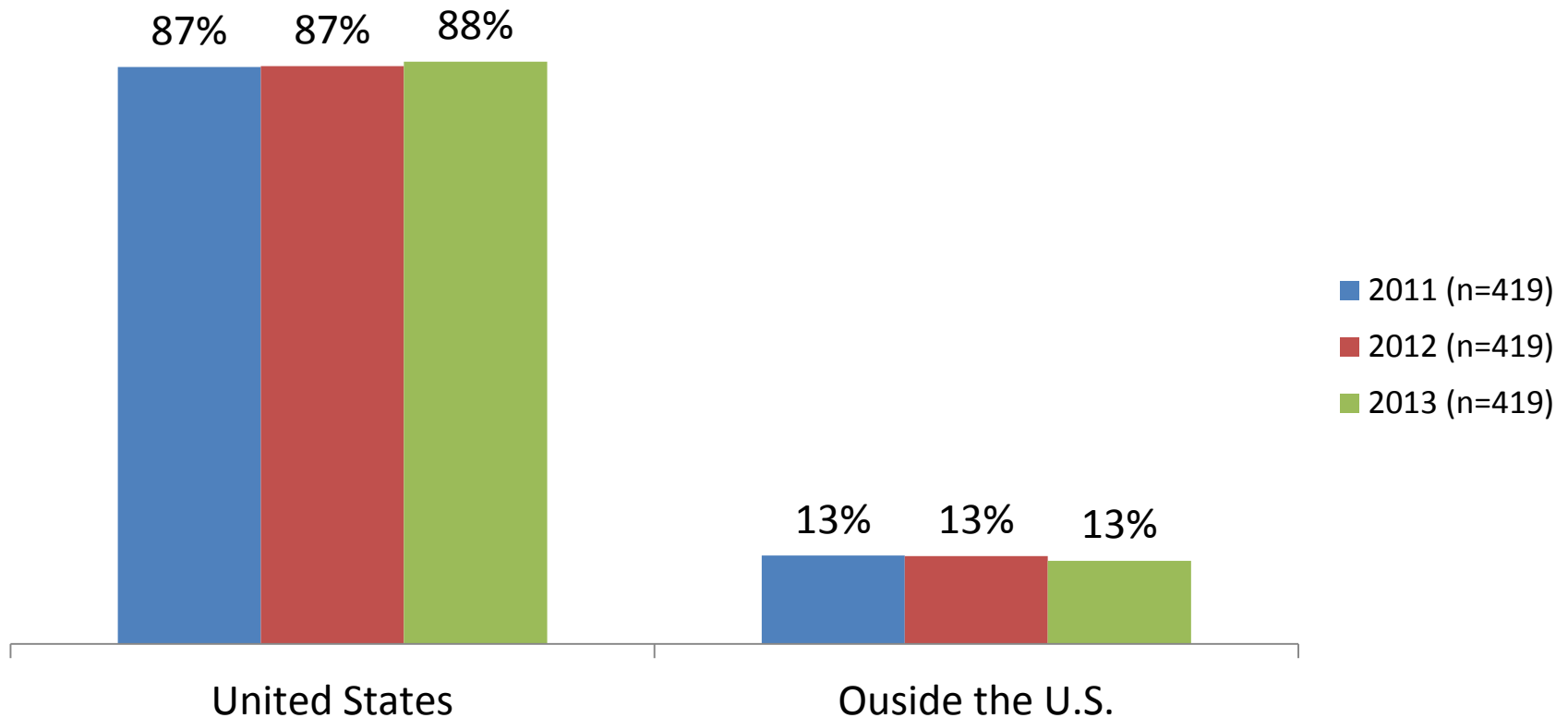
## Types of Travel as a % of Occupancy



# Origin of Visitors

Nearly nine in ten visitors reside in the United States, with just over 10% traveling to Maine from other countries.

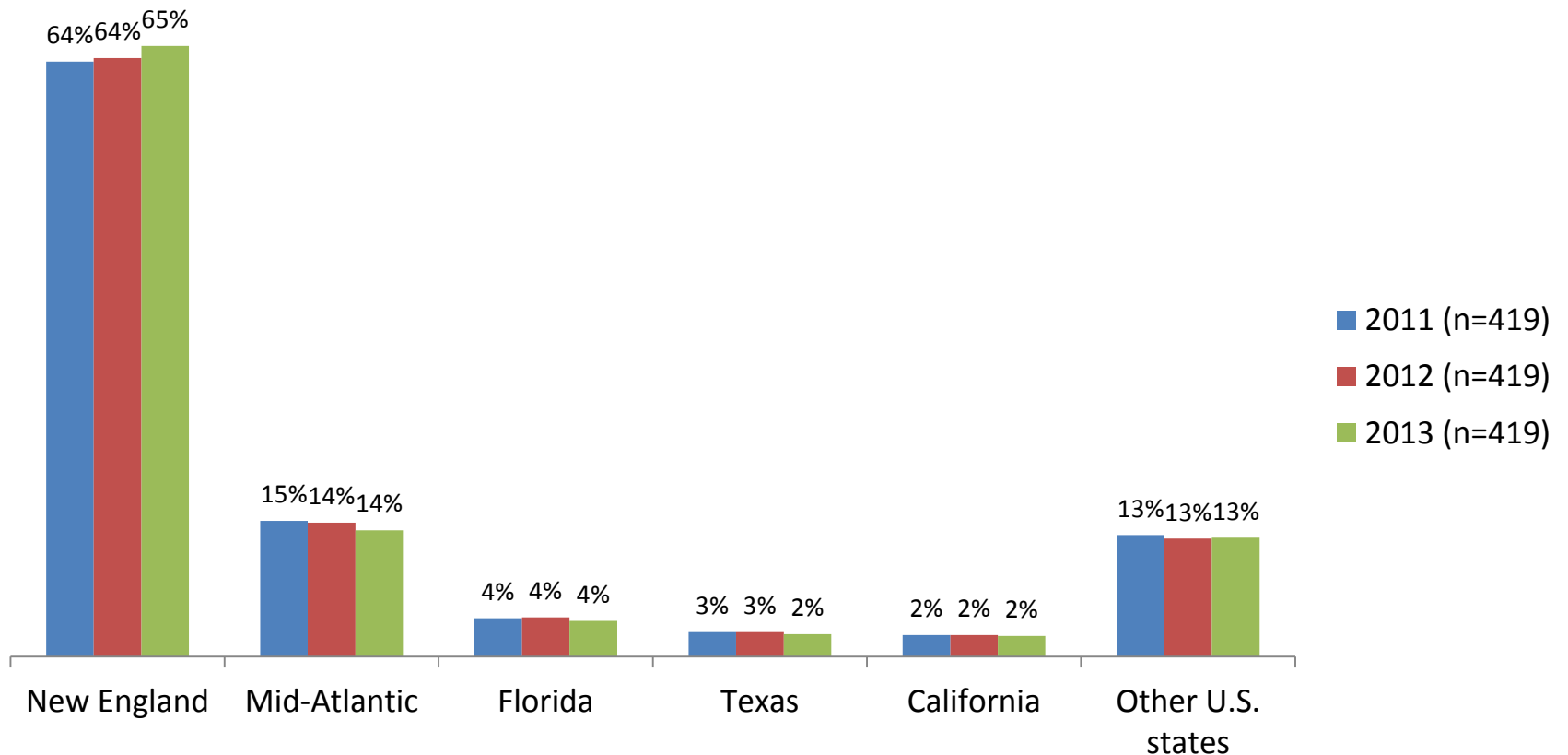
## Visitor's Origin as a % of Occupancy



# U.S. Visitor Origin

New England supplies two-thirds of the U.S. visitors to Maine lodging properties, while the Mid-Atlantic region supplies 15%.

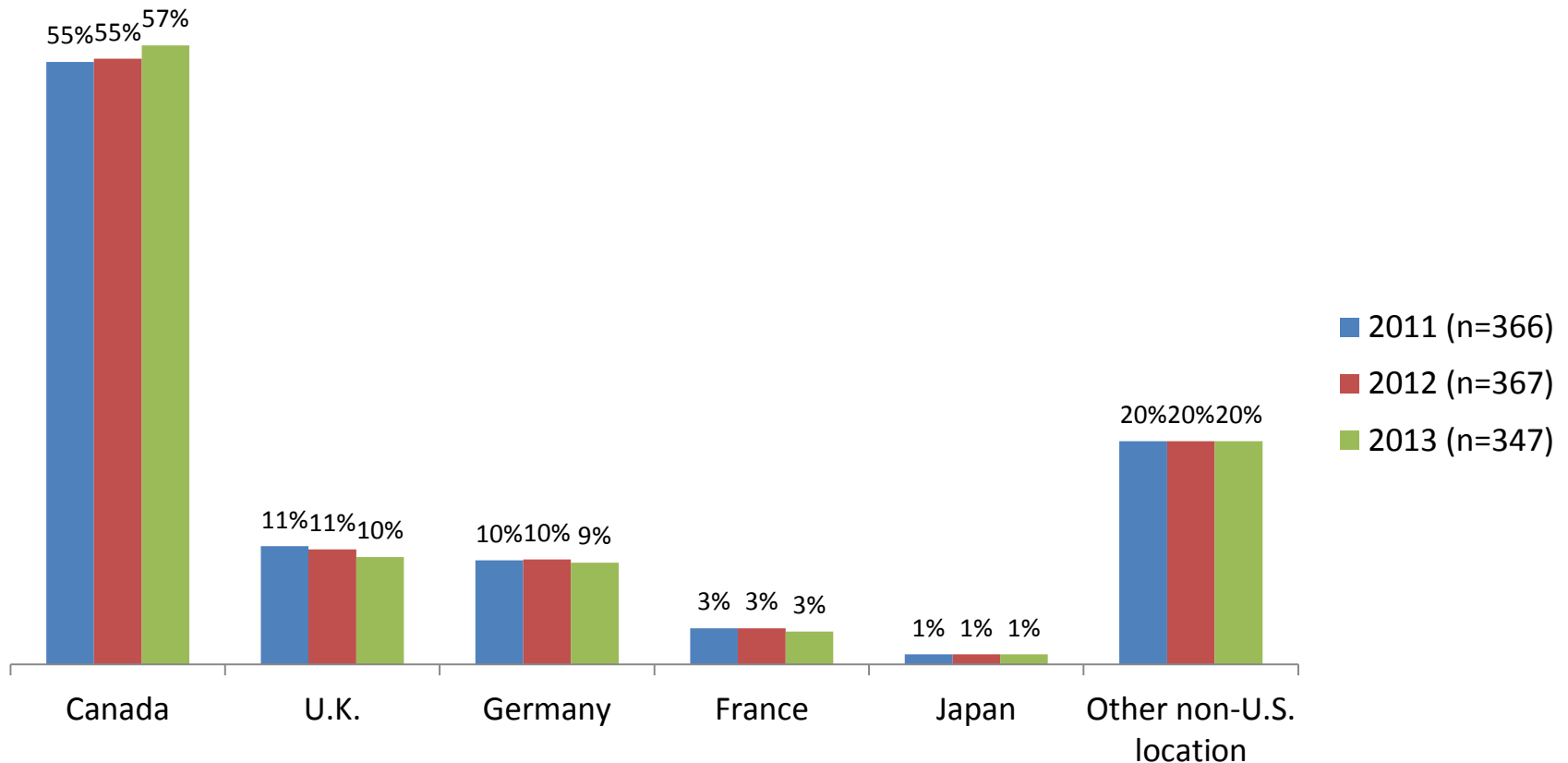
Visitor's Origin as a % of Occupancy



# International Visitor Origin

Among international visitors, more than half are from Canada. One in ten international visitors are traveling from the United Kingdom or Germany.

Visitor's Origin as a % of Occupancy



# Summary Points





# Summary Points

- Maine lodging properties report their strongest occupancy rates and highest average daily rates during the summer season. Summertime continues to be the Maine tourism product's strongest seller.
- While the winter season presents the lowest occupancy rates and average daily rates due to a natural drop in leisure travel during these months, it presents an important opportunity for Maine tourism, given the multitude of winter vacation activities and attractions available.
- Interestingly, despite relatively stable occupancy rates between 2011 and 2012, average daily rates increased slightly during this same time period for most property categories and seasons.

# Summary Points

- Maine lodging properties handle the bulk of their booking on their own, either through their own property websites or directly on the phone. These reservation methods are followed by walk-in customers with no advance reservations. Around half of the HMR, I/BB, and CCC properties also offer preferential booking for their return guests.
- The lodging properties surveyed are reporting a visitor base that is generally in Maine for a leisure trip, and visitors are largely traveling from nearby New England states. International visitation is largely made up of Canadian visitors, with a significant minority arriving from the UK and Germany.



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