

Maine Office of Tourism Research Program

Marketing Your Downeast Tourism Business
November 13, 2008



Overview

- Davidson-Peterson Associates (DPA) conducts the Maine Office of Tourism's visitation and advertising effectiveness research.
- DPA was founded in 1974 to focus on providing market research specifically to the travel and tourism industry.
- DPA was purchased by Digital Research, Inc. in 1999. Digital Research is a leading provider of market research for a broad range of industries throughout the United States.
- Today, we will discuss:
 - Research objectives
 - Research plan overview
 - What's comparable
 - What's different
 - Some specifics regarding the research
 - Data collection updates
 - Travel trends

Maine Office of Tourism Research Objectives

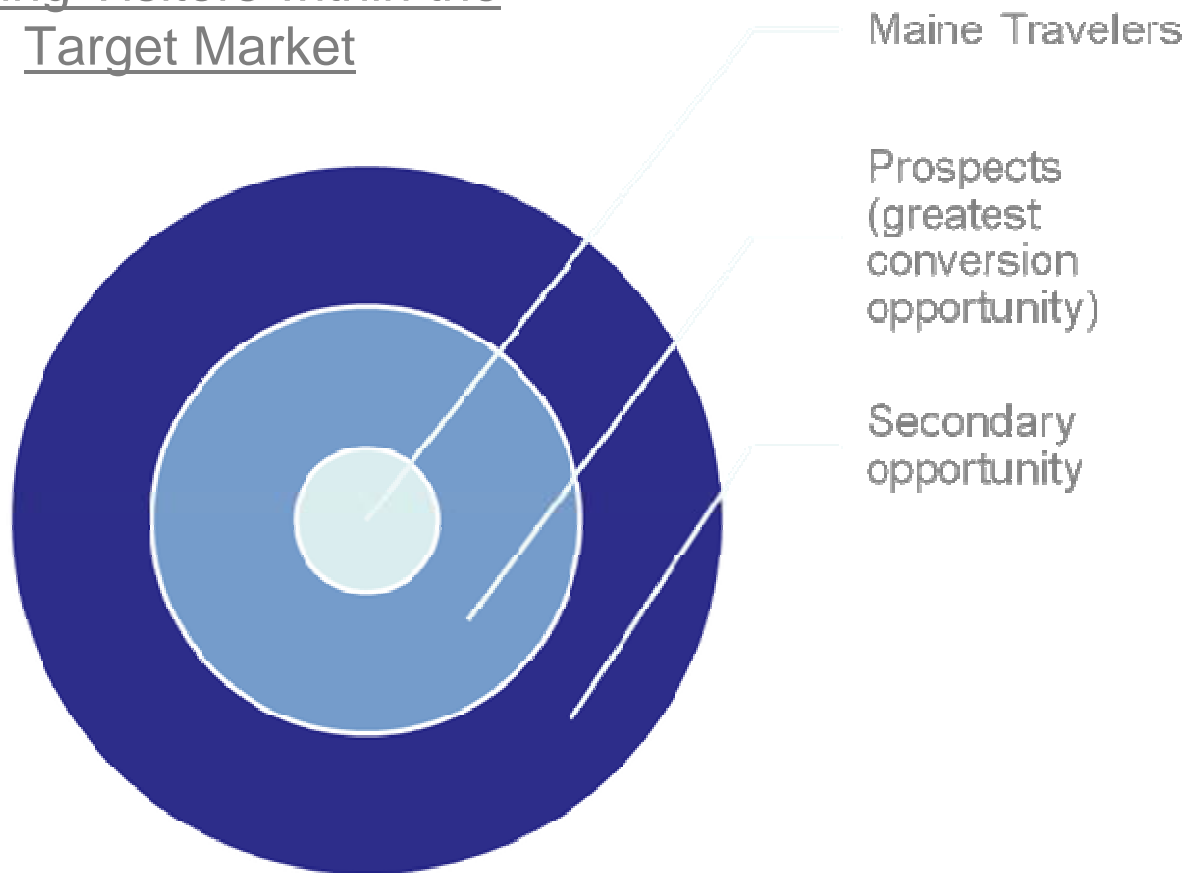
- To profile Maine visitors and best prospects in demographic and socioeconomic terms as well as in their travel patterns;
- To explore perceptions of Maine among visitors and best prospects;
- To understand why some travelers choose to visit Maine while others go elsewhere;
- To describe both seasonal and regional visitation patterns of Maine visitors;
- To explore what Maine visitors like and dislike about the locations in Maine they have visited;
- To estimate levels of spending in Maine by resident and non-resident visitors which will be used by the State Planning Office to estimate the economic impacts of tourism in Maine by season and region; and
- To track seasonal and annual prospect response to advertising and marketing sponsored by the Office of Tourism so as to assess the effectiveness of Maine's tourism marketing campaigns.

Research Plan Overview

- To track seasonal visitation, profile visitors to Maine and estimate their expenditures, and understand the reasons for this visitation, we are conducting online surveys among:
 - Overnight visitors to Maine
 - Day visitors to Maine
- To better understand how to market to prospects, in order to assist us in the conversion of these travelers to a Maine destination, we are conducting online surveys among:
 - Prospects: Target travelers who reside in ME's media markets and travel to New England or the Atlantic Provinces for leisure purposes, but do not choose Maine
 - Secondary Opportunities: Target travelers who travel, but do not choose New England or the Atlantic Provinces for leisure purposes
 - Understanding these groups allows us to compare and contrast them to Maine visitors

Research Plan Overview

Profiling Visitors within the Target Market



Research Plan Overview

Maine Visitors

- Trip planning
- Trip profiling
- Motivations for travel
- Regional destinations and activities
- Expenditures
- Satisfaction with trip
- Future intent/recommendation
- Impressions of Maine
- Traveler profiling

Prospects

- Trip planning
- Trip profiling (where did they go instead of Maine?)
- Motivations for travel
- Activities
- Satisfaction with trip taken
- Impressions of Maine
- Reasons why it was not selected for this trip
- Future interest in traveling to Maine
- Traveler profiling

Secondary Opportunity

- Trip profiling
- Motivations for travel
- Activities
- Satisfaction with trip taken
- Impressions of Maine
- Future interest in traveling to Maine
- Traveler profiling

Research Plan Overview

Advertising Effectiveness Tracker

- To measure the effectiveness of MOT's tourism marketing campaigns, we will be conducting a standard ad tracker in Maine's advertising markets
- The tracker will be fielded seasonally, just following each season's marketing efforts.
 - The first wave of data collection is complete.
 - For this wave, surveys from 967 travelers residing in Maine's advertising markets were completed.

Research Plan Overview

Advertising Effectiveness Tracker



What's Comparable

- In order to continue to provide traveler statistics and expenditure data to MOT, we will be collecting many similar data points to prior research including:
 - Number of trips
 - Regional market share information
 - Trip profiles (length of stay, party size)
 - Traveler profiles
 - Expenditure data
 - Advertising awareness and its influence on travel
 - Return on marketing investment

What's Different

- While key measures are comparable to prior studies, several changes are being made to further our understanding of Maine as a travel destination
 - Speed of data collection and reporting – bi-weekly online data collection. Seasonal reports available approximately one month from season end.
 - Regional traveler profile data – who is traveling where in the state and why?
 - More detail on trip planning processes
 - Satisfaction with their trip to Maine – did it meet their expectations?
 - Inclusion of Canadian visitors into the traveler profile data
 - More detailed profiling of visitors – beyond demographics to more motivations for travel
 - Detailed analysis of prospects – and what prevents them from traveling to Maine
 - More open ended responses from travelers – so we can see how they feel about Maine *in their own words*
 - Greater ability for data mining to support other tourism issues - we plan to provide this data regularly to CenTRO to aid other tourism-specific information needs

What's Different

Ongoing data collection
Faster reporting

More region data

Greater understanding of motivations to travel to Maine – what works

Stronger profile of Maine's visitor – both US and Canadian

Understanding what is preventing travel to Maine – what do we need to work on

Research Specifics: National Omnibus Study

- Objectives:
 - Determine Maine's regional and national market share of the travel market
 - Estimate total visitation to Maine
- Sample Definition:
 - National balanced sample
- Method:
 - Online survey
 - Collect data bi-weekly
 - Annual sample of 39,000

Research Specifics: Regional Travel Study

- Objectives:
 - To provide in-depth information for overnight trips taken to Maine among residents of Maine’s marketing region
 - To provide in-depth information for overnight trips taken to key competitive states/provinces
 - To compare travel patterns of Maine visitors with those of other areas visited by residents of Maine’s marketing region
- Sample Definition:
 - Residents of New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada who have taken an overnight trip in the last four weeks
- Method:
 - Annual sample of 3,000 overnight visitors to Maine
 - Annual sample of 2,500 prospects/secondary opportunity travelers who have traveled overnight for leisure in the region, but have not chosen Maine

Research Specifics: Maine Day Visitor Survey

- Objectives:
 - To provide in-depth information on day-trips to Maine
- Sample Definition:
 - All respondents will reside within a 100-mile radius of Maine's borders (including Eastern Canada) or within Maine who have taken a day trip to Maine within the past four weeks
- Method:
 - 1,500 surveys conducted online annually
 - Note: Although Maine resident day visitors are not included in the State's impact calculations, we are collecting data on these visitors. We will provide data both with Maine day visitors and without.

Research Specifics: Marketing Campaign Effectiveness Study

- Objectives:
 - To evaluate the effectiveness of Maine’s tourism marketing campaigns by assessing tourist awareness of and response to these campaigns.
- Sample Definition:
 - A total of 2,000 online interviews will be conducted in Maine’s advertising markets (New England, New York City, New Jersey, Philadelphia, Baltimore, Washington, DC and Albany as well as Toronto, Montreal, and the Atlantic Provinces) with adults aged 18+ who have traveled in the past 12 months.
 - Field will occur in three waves (Spring/Summer, Fall, Winter)

Data Collection Update

National Omnibus Survey

- 6,000 surveys completed by US travelers to date
- Covering travel from late June through late August

Advertising Effectiveness Survey

- 967 surveys completed by travelers in Maine's marketing areas.

Data Collection Update

Maine Overnight Visitors

- 1,532 surveys completed by travelers who have taken an overnight trip in Maine from late June through late August
- Travelers visiting all regions in Maine.

Maine Day Visitors

- 604 surveys completed by travelers who have taken a day trip in Maine from late June through late August
- Travelers visiting all regions in Maine.

Data Collection Update

Maine Prospects

- 938 surveys completed by travelers who have taken an overnight trip in New England or the Atlantic Provinces in the last four weeks, but not traveled to Maine in past three years

Secondary Opportunities

- 685 surveys completed by travelers who have taken an overnight trip in the past four weeks, but not in Maine or its key competitive states/provinces

Travel Trends

Trying times for tourism nationwide:

- Hotel/motel occupancy rates are down 2.5% YTD compared to 2007
- Demand for motor gas down 1.7% YTD
- Domestic air traffic down 2.5% YTD
- Overnight stays at National Parks down 3.2% YTD
- Travel Price Index up 7.8% YTD
 - Compares to Consumer Price Index up 4.4% YTD

Bright spots:

- Portland Jetport breaking passenger count records with addition of low-cost carriers; projections look solid for coming months
- Cruise business is holding
- e-Commerce in travel is still strong
- Amtrak ridership up 11.4% YTD

Travel Trends

Points to Consider:

- Focus on the closer-in drive market and in-state market
 - These markets are providing key visitation for many destinations right now
- Consumer budgets are tight. Marketing should include cost-effective vacation alternatives
 - Packaging - collaboration within industry
 - Highlight value-added benefits of vacationing in Maine
 - Web deals are an important access point
 - Consider Downeaster train and travel deals
- Continue to encourage cruise stops on Maine coast
- If you're holding your own in this market, you're doing great!

THANK YOU



For any additional questions, please contact:

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