

CenTRO Research Update

May 2009

CenTRO is the University of Maine System Center for Tourism Research and Outreach. Started as a collaboration between the University of Maine and USM, there are more than 20 faculty on 5 of the 7 UMS campuses involved in CenTRO research and outreach projects. CenTRO's next event is its Tourism Work Force Development Conference on May 29 at the Maple Hill B&B and Conference Center in Hallowell, Maine.

The following provides an update of CenTRO research in progress. Interim findings are summarized from two research projects, one of which is a CenTRO project and the other is the class project for BUA 676 Marketing Research and Analysis, an MBA elective at the University of Maine.

Research Projects

Project 1: The Summer Vacation Planning Study of Maine Skiers

The purpose of this project is to help identify new tourist products that respond to the current economic crisis. It also has identified the reaction of Maine's tourists to the US economic crisis in terms of vacation and leisure travel planning. By sampling skiers at Sunday River ski resort, the sample for the survey exclusively includes travelers to Maine. The survey is being conducted in 2 parts. Part one was an on-site survey conducted at Sunday River Ski Resort in Newry, Maine, on 3 weekends; the last 2 weekends in March and the first weekend in April. Part two is an on-line follow-up questionnaire seeking more in-depth information from respondents to the on-site survey about summer travel in Maine and is currently in the field. The data reported here is from the on-site survey. This is a CenTRO project.

Project 2: The Summer Vacation Planning Study of Leisure Travelers

The purpose of this project, besides providing the members of the MBA Marketing Research Class with an educational opportunity, is to determine the likely reaction of a broad sample of travelers in Maine's drive market to the global economic crisis with respect to summer vacation planning. Fielded as an on-line survey among the Survey Sampling, Inc., Survey Spot e-mail panel, it surveyed more than 600 respondents from Maine's drive market; the northeastern US states and 4 Canadian provinces that abut the state of Maine.

Limitation

Both of the research projects reported here represent static, point-in-time measurements and research designs executed after a focal event, in this case after the dramatic stock market declines of late September and November of 2008. The ideal research design for addressing questions about impacts of these events would involve measurements taken over time, such that some of the measurements would have been recorded prior to these events and some after these events.

Caution

Given the volatility of national economic conditions and the on-going evidence of consumers' reluctance to spend in other product categories, some caution in interpreting any survey data is urged. This is particularly important for Project 1 above, The Summer Vacation Planning Study of Maine Skiers. Because of the narrow and upscale nature of the sample drawn from Maine's Sunday River ski resort, it may not represent the behavioral expectations of other, less affluent tourists, very well.

Conclusions

- 1. The global economic crisis of the past 8 months appears unlikely to dramatically impact leisure travel to Maine during the upcoming summer vacation season.**
 - a. The skiers at Maine's Sunday River Ski Resort report unwillingness to compromise by reducing the number or length of leisure trips planned for the summer or by reducing the distance traveled on those trips. (See Tables 1 & 2 below)
 - b. Respondents residing in Maine's drive market also seem unwilling to abstain from leisure travel this summer. (See Tables 3, 4, 5)
 - c. Respondents residing in Maine's drive market who have started to plan their summer vacation and visited Maine in the past 5 years are more likely to return to Maine than are similar visitors to Massachusetts, New Hampshire or Vermont with respect to returning to destinations in those states, considered to be Maine's major competitors for leisure travelers. (See Tables 6, 7, 8, 9 & 10)

- 2. The impact of the economic crisis on Maine tourism is likely to be limited to softness in demand for upscale lodging and dining.**
 - a. More than 1 in 5 skiers surveyed at Sunday River ski resort indicated that they definitely would seek less expensive lodging and dining during this summer's vacation. (See Table 2)
 - b. Nearly a third of respondents indicated a definite intention to reduce the number of restaurant meals while on vacation this summer. (See Table 2)

These findings have been replicated in national research conducted by Deloitte's US Tourism and Hospitality Division¹. The decline in gas prices is offered as a reason for the resiliency in tourism and the decline in plans for "staycations" compared to last year. "Overall, the survey found only 42 percent of Americans plan a leisure trip this summer, down from the 49 percent who said they planned to take a summer trip in an AP-Ipsos poll conducted in May 2005."

We continue to analyze data from these projects and will release more insights from them during the next MaineTAC meeting on June 25 in Millinocket.

¹ Petroni, Christina (May 12, 2009), "Americans Warm Up to Summer Travel in 2009", PR News Wire, Hill & Knowlton. <http://news.prnewswire.com/DisplayReleaseContent.aspx?ACCT=104&STORY=/www/story/05-12-2009/0005024457&EDATE=>

Table 1

What do your plans include for summer leisure travel this year compared to last year?

<i>2009 compared to 2008</i>	Much Less (1)	Slightly Less (2)	About Same (3)	Slightly More (4)	Much More (5)	Total		<i>Mean</i>
	%	%	%	%	%	N	%	
Number of leisure trips	3.40	9.52	65.65	15.48	5.95	588	100	3.11
Length of leisure trips	3.06	8.66	72.84	10.02	5.43	589	100	3.06
Distance you plan to travel	4.95	8.19	68.09	8.36	10.41	586	100	3.11
Spending on leisure trips	6.97	18.54	55.27	11.39	7.82	588	100	2.95

Source: The Summer Vacation Planning Study of Maine Skiers

Table 2

What affect do you think current economic conditions will have on your summer travel plans?

<i>How likely will you be to....</i>	Definitely will not (1)	2	3	4	Definitely will (5)	Total		<i>Mean</i>
	%	%	%	%	%	N	%	
Stay at less expensive lodging	31.8	8.7	21.1	11.3	27.1	573	100.0	2.93
Eat at less expensive restaurants	30.3	9.8	21.1	16.3	22.6	584	100.0	2.91
Reduce the number of restaurants	25.5	9.2	18.1	17.1	30.1	585	100.0	3.17
Reduce the number of attractions visited	41.5	13.4	21.2	11.0	12.9	581	100.0	2.40
Choose less expensive attractions	38.4	9.9	22.0	13.0	16.6	583	100.0	2.60
Shorten time at destination	55.9	11.7	18.7	6.5	7.2	583	100.0	1.97
Lengthen time at destination	61.4	10.1	18.3	6.1	4.2	575	100.0	1.82
Travel less frequently	49.7	10.5	18.4	8.8	12.6	581	100.0	2.24
Travel closer to home	41.4	7.4	17.9	14.4	18.9	582	100.0	2.62
Avoid all leisure travel this summer	91.0	4.6	2.4	1.0	1.0	586	100.0	1.17

Source: The Summer Vacation Planning Study of Maine Skiers

**Table 3
Annually Take Vacation**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	379	59.3	60.4	60.4
	No	248	38.8	39.6	100.0
	Total	627	98.1	100.0	
Missing	System	12	1.9		
Total		639	100.0		

Source: The Summer Vacation Planning Study of Leisure Travelers

**Table 4
Vacation Past Year**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	389	60.9	62.0	62.0
	No	238	37.2	38.0	100.0
	Total	627	98.1	100.0	
Missing	System	12	1.9		
Total		639	100.0		

Source: The Summer Vacation Planning Study of Leisure Travelers

**Table 5
Planning Vacation this Year**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	436	68.2	69.9	69.9
	No	188	29.4	30.1	100.0
	Total	624	97.7	100.0	
Missing	System	15	2.3		
Total		639	100.0		

Source: The Summer Vacation Planning Study of Leisure Travelers

Table 6
Next Vacation Destination

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	None	36	16.1	16.2	16.2
	Orlando, Fl.	25	11.2	11.3	27.5
	The Caribbean	24	10.7	10.8	38.3
	Ontario, Canada	21	9.4	9.5	47.7
	Maine	14	6.3	6.3	54.1
	New York State	12	5.4	5.4	59.5
	The Carolinas	11	4.9	5.0	64.4
	Quebec, Canada	10	4.5	4.5	68.9
	Las Vegas, Nv	10	4.5	4.5	73.4
	Massachusetts	8	3.6	3.6	77.0
	New Brunswick, Canada	8	3.6	3.6	80.6
	Ireland	8	3.6	3.6	84.2
	New Jersey	7	3.1	3.2	87.4
	Nova Scotia, Canada	6	2.7	2.7	90.1
	Hawaii	4	1.8	1.8	91.9
	Australia	3	1.3	1.4	93.2
	Connecticut	2	.9	.9	94.1
	New Hampshire	2	.9	.9	95.0
	Costa Rica	2	.9	.9	95.9
	Rhode Island	1	.4	.5	96.4
	Vermont	1	.4	.5	96.8
	Branson, Mo.	1	.4	.5	97.3
The Dakotas	1	.4	.5	97.7	
Washington State	1	.4	.5	98.2	
Colorado	1	.4	.5	98.6	
Kenya	1	.4	.5	99.1	
The Amazon	1	.4	.5	99.5	
Philadelphia	1	.4	.5	100.0	
	Total	222	99.1	100.0	
Missing	System	2	.9		
Total		224	100.0		

Sample: Claimed to have already started planning summer vacation.

Source: The Summer Vacation Planning Study of Leisure Travelers

Table 7
Next Vacation Destination by Maine Visitation Status
Among Respondents Having Started Vacation Planning

		Vacation Destinations Visited 5 Yrs-Maine		Total
		Not Visited	Visited Maine	
Ontario, Canada	Count	18	3	21
	% within Vacation Destinations	10.5%	5.9%	9.5%
Quebec, Canada	Count	10	0	10
	% within Vacation Destinations	5.8%	.0%	4.5%
Nova Scotia, Canada	Count	3	3	6
	% within Vacation Destinations	1.8%	5.9%	2.7%
New Brunswick, Canada	Count	7	1	8
	% within Vacation Destinations	4.1%	2.0%	3.6%
Maine	Count	2	12	14
	% within Vacation Destinations	1.2%	23.5%	6.3%
Vermont	Count	0	1	1
	% within Vacation Destinations	.0%	2.0%	.5%
New Hampshire	Count	1	1	2
	% within Vacation Destinations	.6%	2.0%	.9%
Rhode Island	Count	0	1	1
	% within Vacation Destinations	.0%	2.0%	.5%
Massachusetts	Count	5	3	8
	% within Vacation Destinations	2.9%	5.9%	3.6%
Connecticut	Count	1	1	2
	% within Vacation Destinations	.6%	2.0%	.9%
New Jersey	Count	5	2	7
	% within Vacation Destinations	2.9%	3.9%	3.2%
Total	Count	171	51	222
	% within Vacation Destinations	100.0%	100.0%	100.0%

Sample: Claimed to have already started planning summer vacation.

Source: The Summer Vacation Planning Study of Leisure Travelers

Table 8
Next Vacation Destination by Massachusetts Visitation Status
Among Respondents Having Started Vacation Planning

		Vacation Destinations Visited 5 Yrs- Massachusetts		Total
		Not Visited	Visited Mass	
Ontario, Canada	Count	19	2	21
	% within Vacation Destinations	11.7%	3.3%	9.5%
Quebec, Canada	Count	10	0	10
	% within Vacation Destinations	6.2%	.0%	4.5%
Nova Scotia, Canada	Count	5	1	6
	% within Vacation Destinations	3.1%	1.7%	2.7%
New Brunswick, Canada	Count	8	0	8
	% within Vacation Destinations	4.9%	.0%	3.6%
Maine	Count	9	5	14
	% within Vacation Destinations	5.6%	8.3%	6.3%
Vermont	Count	0	1	1
	% within Vacation Destinations	.0%	1.7%	.5%
New Hampshire	Count	1	1	2
	% within Vacation Destinations	.6%	1.7%	.9%
Rhode Island	Count	0	1	1
	% within Vacation Destinations	.0%	1.7%	.5%
Massachusetts	Count	2	6	8
	% within Vacation Destinations	1.2%	10.0%	3.6%
Connecticut	Count	0	2	2
	% within Vacation Destinations	.0%	3.3%	.9%
New Jersey	Count	4	3	7
	% within Vacation Destinations	2.5%	5.0%	3.2%
Total	Count	162	60	222
	% within Vacation Destinations	100.0%	100.0%	100.0%

Sample: Claimed to have already started planning summer vacation.

Source: The Summer Vacation Planning Study of Leisure Travelers

Table 9
Next Vacation Destination by New Hampshire Visitation Status
Among Respondents Having Started Vacation Planning

		Vacation Destinations Visited 5 Yrs-New Hampshire		Total
		Not Visited	Visited NH	
Ontario, Canada	Count	19	2	21
	% within Vacation Destinations	10.4%	5.0%	9.5%
Quebec, Canada	Count	10	0	10
	% within Vacation Destinations	5.5%	.0%	4.5%
Nova Scotia, Canada	Count	5	1	6
	% within Vacation Destinations Visited 5 Yrs-New Hampshire	2.7%	2.5%	2.7%
New Brunswick, Canada	Count	8	0	8
	% within Vacation Destinations	4.4%	.0%	3.6%
Maine	Count	8	6	14
	% within Vacation Destinations	4.4%	15.0%	6.3%
Vermont	Count	0	1	1
	% within Vacation Destinations	.0%	2.5%	.5%
New Hampshire	Count	0	2	2
	% within Vacation Destinations	.0%	5.0%	.9%
Rhode Island	Count	1	0	1
	% within Vacation Destinations	.5%	.0%	.5%
Massachusetts	Count	6	2	8
	% within Vacation Destinations	3.3%	5.0%	3.6%
Connecticut	Count	1	1	2
	% within Vacation Destinations	.5%	2.5%	.9%
New Jersey	Count	5	2	7
	% within Vacation Destinations	2.7%	5.0%	3.2%
Total	Count	182	40	222
	% within Vacation Destinations	100.0%	100.0%	100.0%

Sample: Claimed to have already started planning summer vacation.

Source: The Summer Vacation Planning Study of Leisure Travelers

Table 10
Next Vacation Destination by Vermont Visitation Status
Among Respondents Having Started Vacation Planning

		Vacation Destinations Visited 5 Yrs-Vermont		Total
		Not Visited	Visited Vermont	
Ontario, Canada	Count	19	2	21
	% within Vacation Destinations	10.5%	4.9%	9.5%
Quebec, Canada	Count	9	1	10
	% within Vacation Destinations	5.0%	2.4%	4.5%
Nova Scotia, Canada	Count	5	1	6
	% within Vacation Destinations	2.8%	2.4%	2.7%
New Brunswick, Canada	Count	7	1	8
	% within Vacation Destinations	3.9%	2.4%	3.6%
Maine	Count	10	4	14
	% within Vacation Destinations	5.5%	9.8%	6.3%
Vermont	Count	0	1	1
	% within Vacation Destinations	.0%	2.4%	.5%
New Hampshire	Count	0	2	2
	% within Vacation Destinations	.0%	4.9%	.9%
Rhode Island	Count	0	1	1
	% within Vacation Destinations	.0%	2.4%	.5%
Massachusetts	Count	6	2	8
	% within Vacation Destinations	3.3%	4.9%	3.6%
Connecticut	Count	2	0	2
	% within Vacation Destinations	1.1%	.0%	.9%
New Jersey	Count	5	2	7
	% within Vacation Destinations	2.8%	4.9%	3.2%
Total	Count	181	41	222
	% within Vacation Destinations	100.0%	100.0%	100.0%

Sample: Claimed to have already started planning summer vacation.

Source: The Summer Vacation Planning Study of Leisure Travelers