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Applying Travel Behavior Research to the Marketing Puzzle

Source: XBorder Canada Year-End 2023






Year End 2023
Maine

Size of the Overnight Canadian Market	Canadian Overnight Visitors			
	Overnight Visitors to the United States	Overnight Visitors to Maine	Nights Spent in Maine	Direct Spend in Maine
	20,514,340	477,678	1,537,419	\$205,249,339

How are they planning?	Canadian Overnight Visitors To Maine			
	Decision Days Prior to travel (Average)	Information Sources (total mentions)		Among Social Media - Regularly Use
	61	Friends/Family	43%	YouTube 46%
	Websites	59%	Facebook 51%	
	Social Media	26%	Instagram 53%	
	Online Experts/Influencers	12%	Trip Advisor 30%	

Who is coming?	Canadian Overnight Visitors To Maine				
	Province of Residence	 Average Age	Total Travel Group Composition		Average Party Size
	Atlantic 42%		Child(ren) <18 on Trip	37%	Avg. in Immediate Travel Party
Quebec 41%	49.4	Couple - No Kids on Trip	32%	2.6	
Ontario 15%		Other group types	28%	Avg. in Household	
Prairies 0%		Solo Traveller	3%	2.2	
Alberta/BC 2%					

How/When are they coming?	Canadian Overnight Visitors To Maine			
	Travel Season	Avg. Nights in Maine	Transportation	Packages Trip Included a Package/Bundle
	Quarter 1 10%		Air Travelers 9%	
Quarter 2 18%	3.2	Land Travelers 91%	29%	
Quarter 3 51%		Paid Accommodations 94%		
Quarter 4 21%		Hotel 77%		
	Accommodations On Trip	Shared Economy 8%		
		Unpaid Accommodations 10%		

Why are they coming?	Canadian Overnight Visitors To Maine			
	Primary Purpose of Trip	Activities on Trip		
	Leisure/Holiday 98%	Entertainment 26%	Art/Culture 24%	
Business 2%	Family/Sightseeing/Misc. 49%	Events/Festivals 20%		
Other 1%	Nature/Outdoors 52%	Adventure Sports 4%		
	Recreational Sports 25%	Business 2%		

What are they spending?	Canadian Overnight Visitors To Maine			
	Per Person Spend in Maine	Spending Categories - % spent in each per Trip		
	Per Trip (Avg) \$430	Accommodations 35%	Getting Around 14%	
Per Night (Avg) \$133	Food/Bev/Dining/Groc 24%	Shopping 13%		
	Entertainment/Activities 7%	Other 4%		

Source: XBorder Canada 2023 Maine Sample N = 260

About XBorder Canada Reports

- Online Panel survey of over 100,000 Canadians per year, since 2018.
- Focuses completely on travel to the United States.
- Reports on over 15,000 Canada to U.S. trips per year.
- Cover the Who, What, Where, When and Why of travel (profiles, spending, volumetrics, marketing, etc.)
- Generates the “one-pager” as well as over 40 detailed tables and limitless cross-tab options.

Today – going beyond the cross-tabs and focusing on marketing.



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When to Promote



Resource Allocation



Messaging



When to Promote

Expected target months based on AVERAGE decision times

Survey Says:

- Overnight Land visitors to Maine made their decision to travel 57 days before their trip.

April Advertising

Mid June Trips

May Advertising

Mid July Trips

June Advertising

Mid August Trips



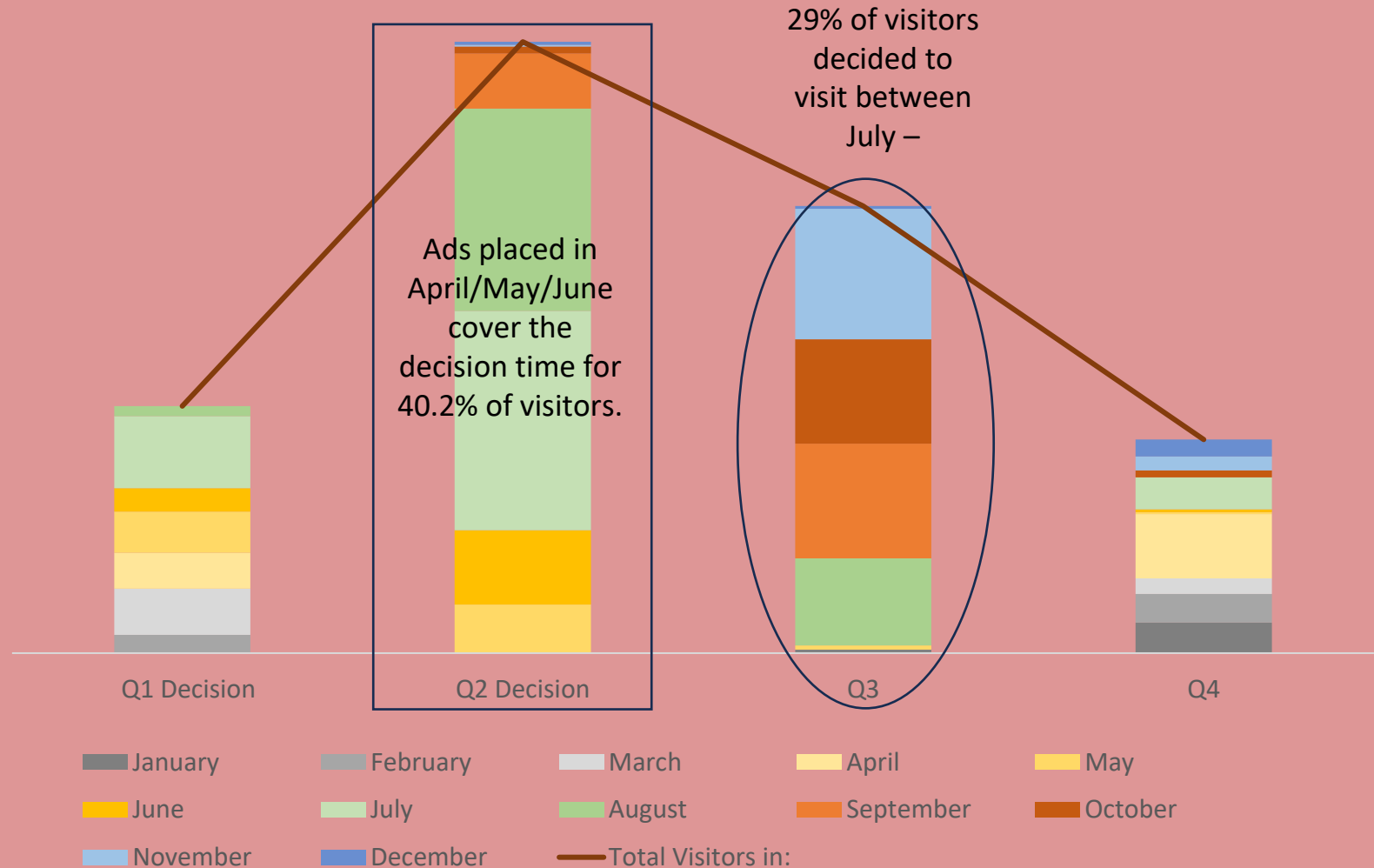
When to Promote

Survey Says:

- Ad placement timing impacts visitors across all seasons.
- Using an “average” decision time length can be misleading.
- Q2 ad placement is influencing travel between **May – September**.
- Q3 ad placement is influencing travel from **July to November**.

Actual Trip Months

Maine Overnight LAND visitors





When to Promote

How might Maine use this data to influence future timing?

Planning & decision making – when to target ads?

- Knowing the actual timing on decision making informs best timing for targeting. This aligns with our Canadian visitor profile data – typical booking cycle begins 50 days prior to the trip.
- We know that we need to be targeting ahead of the planning cycle to be most effective
- 2 months prior to planning/decision time is ideal to start campaign, so ads early Q2 to meet folks who travel Q3 & Q4
- Knowing summer bleeds into fall supports keeping advertising steady in market for Q2 & Q3- Ripe for marketing throughout summer and fall
- This data also provides us with potential opportunity to increase shoulder season visitation
- From the Visitor Profile data we know that 2 in 3 only consider Maine when planning.



Resource Allocation

- Question? Where to focus your resources...to maximize reach
- Long ago there were TV and Magazines and information centers
- Today...





Resource Allocation

Xborder Canada Survey Topics included:

- Information Sources (16 categories)
- Social Media Used (10 categories)
- Booking Channels (6 categories)
- Booking Organizations Used (10 categories)

The overlap possibilities are astronomical.

For example, with 16 items =

1,820 unique combinations of the top 4 items.

It is not typically reliable to assume that the largest categories achieves the largest audience.

Enter TURF (Total Unduplicated Reach and Frequency) analysis

- Analyzes each category, and all combinations, to determine how to maximize reach using the fewest number of categories.
- Creates non-overlapping results that illustrate the impact of adding the next most valuable category into your marketing mix.
- In short, TURF indicates how to optimize advertising spend.



Resource Allocation

Survey Says:

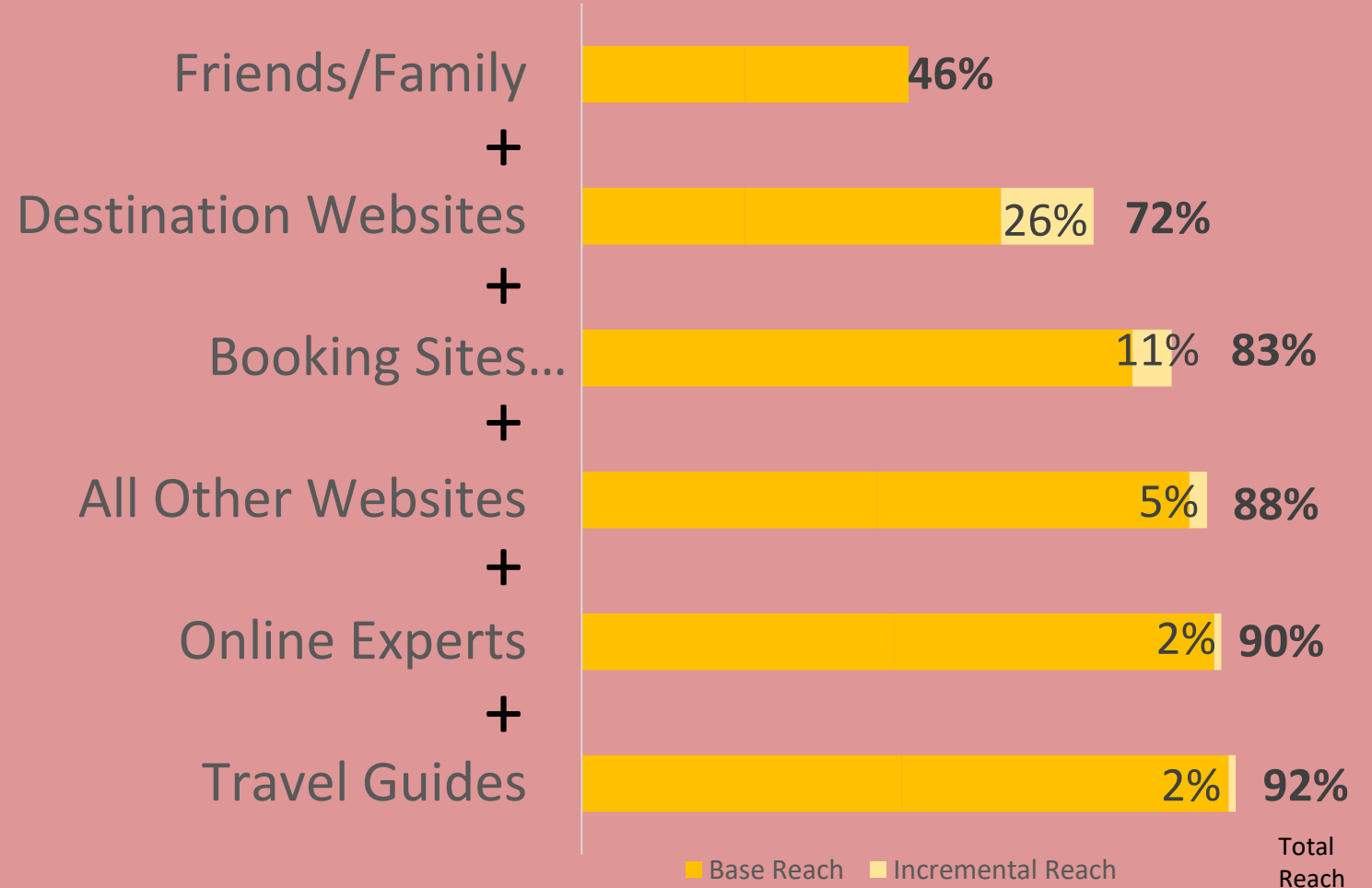
Friends and Family, by far, has the largest reach - 46% of visitors.

- Adding Destination Websites, the *mutually exclusive* incremental reach is 26%, resulting in 72% of visitors.
- Add Booking Sites (11%) and the total reach is now 83%.

Information Sources

Maine Overnight Land Visitors 2023

Incremental Reach





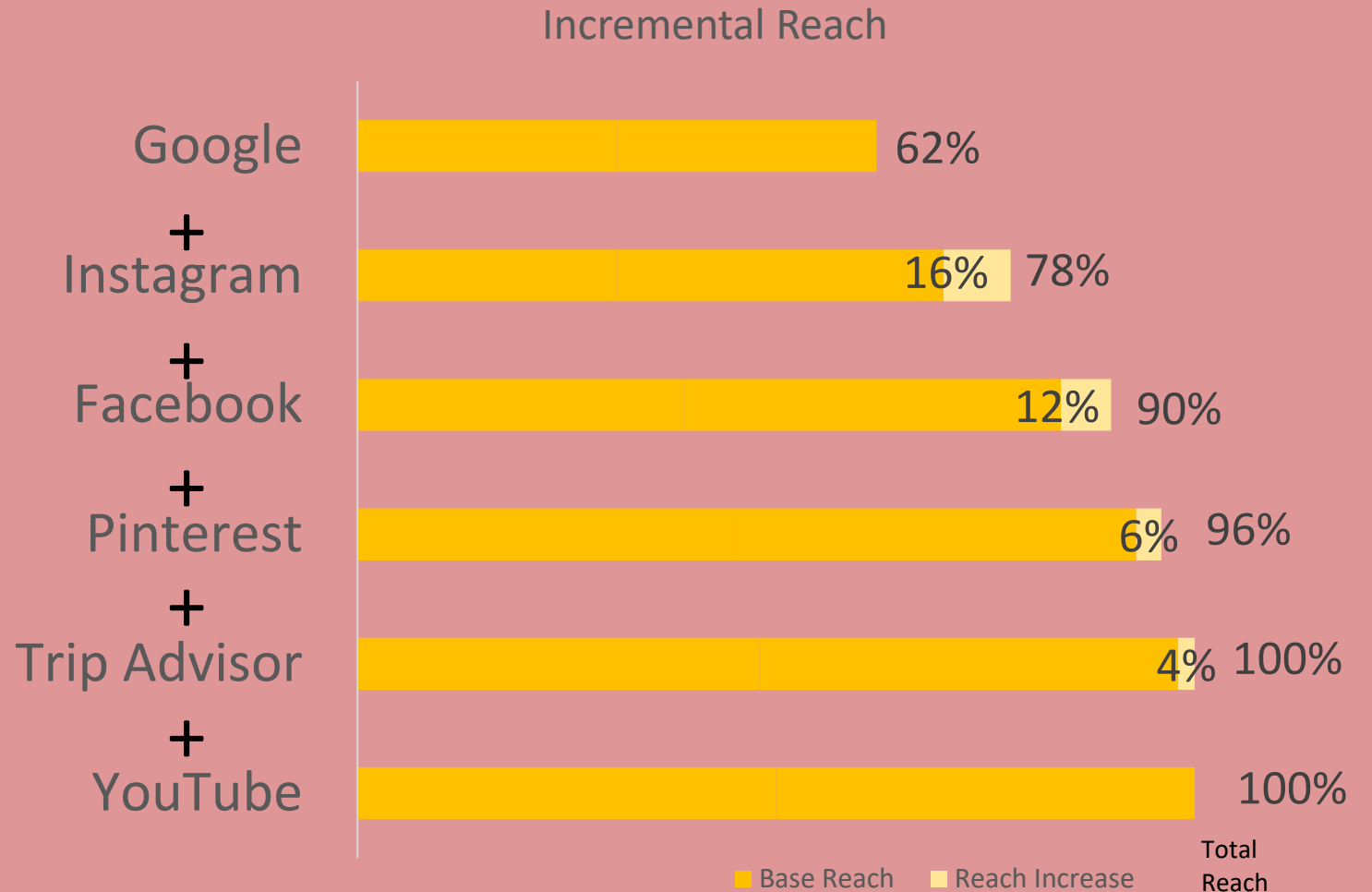
Resource Allocation

Survey Says:

- Google, at 62%, is the singularly dominant planning site.
- An additional 16% used Instagram.
- Facebook adds another 12%, resulting in a total reach of 90%.
- Diminishing returns for the other categories.

Trip Planning Sites

Maine Overnight Land Visitors 2023



Source: XBorder Canada Year-End 2023



Resource Allocation

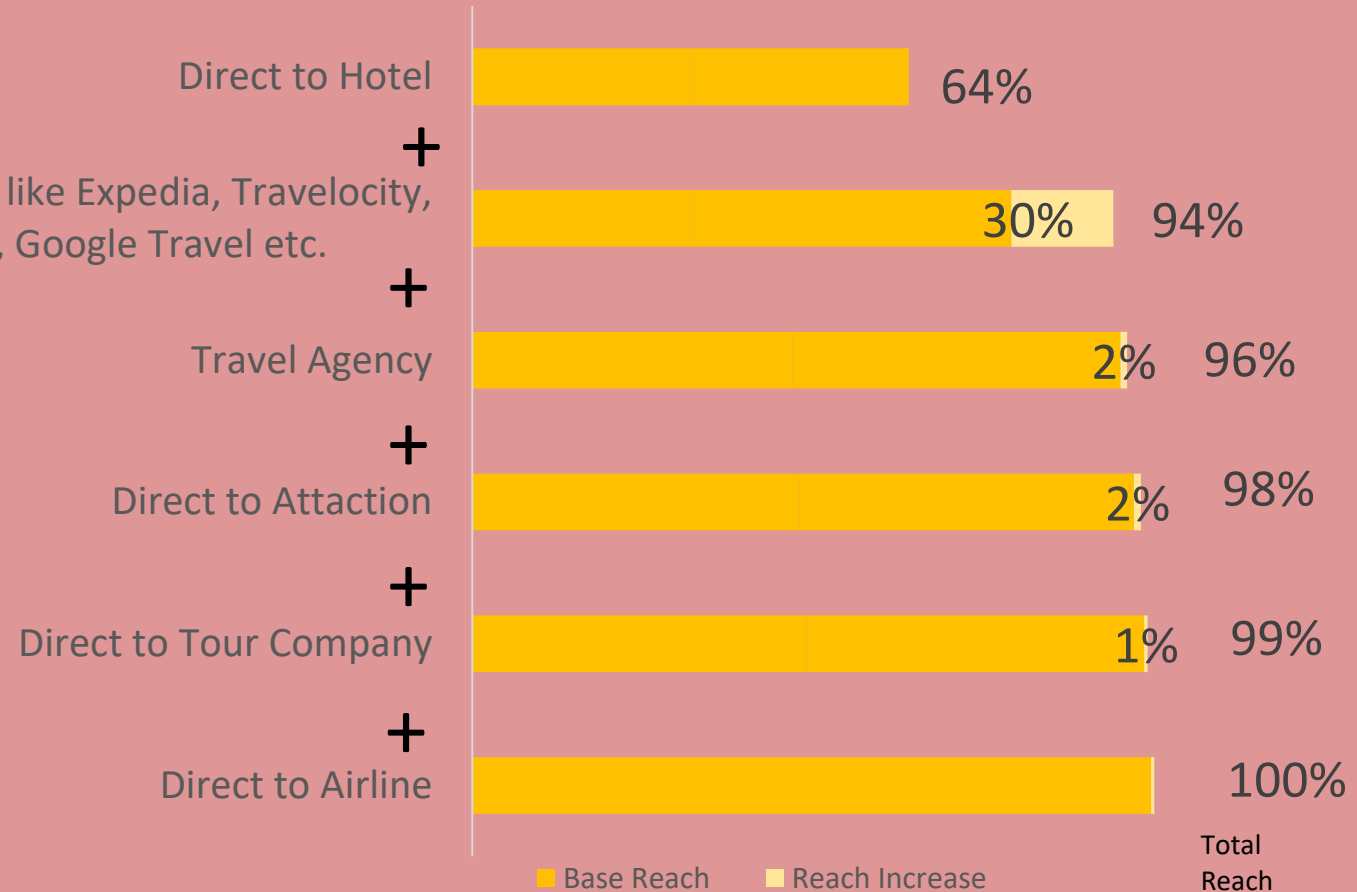
Trip Booking Types

Maine Overnight Land Visitors 2023

Survey Says:

- 64% booked by going directly to a hotel.
- 30% more used a one-source site.
- These two methods already reach 94% of visitors.

Incremental Reach





Resource Allocation

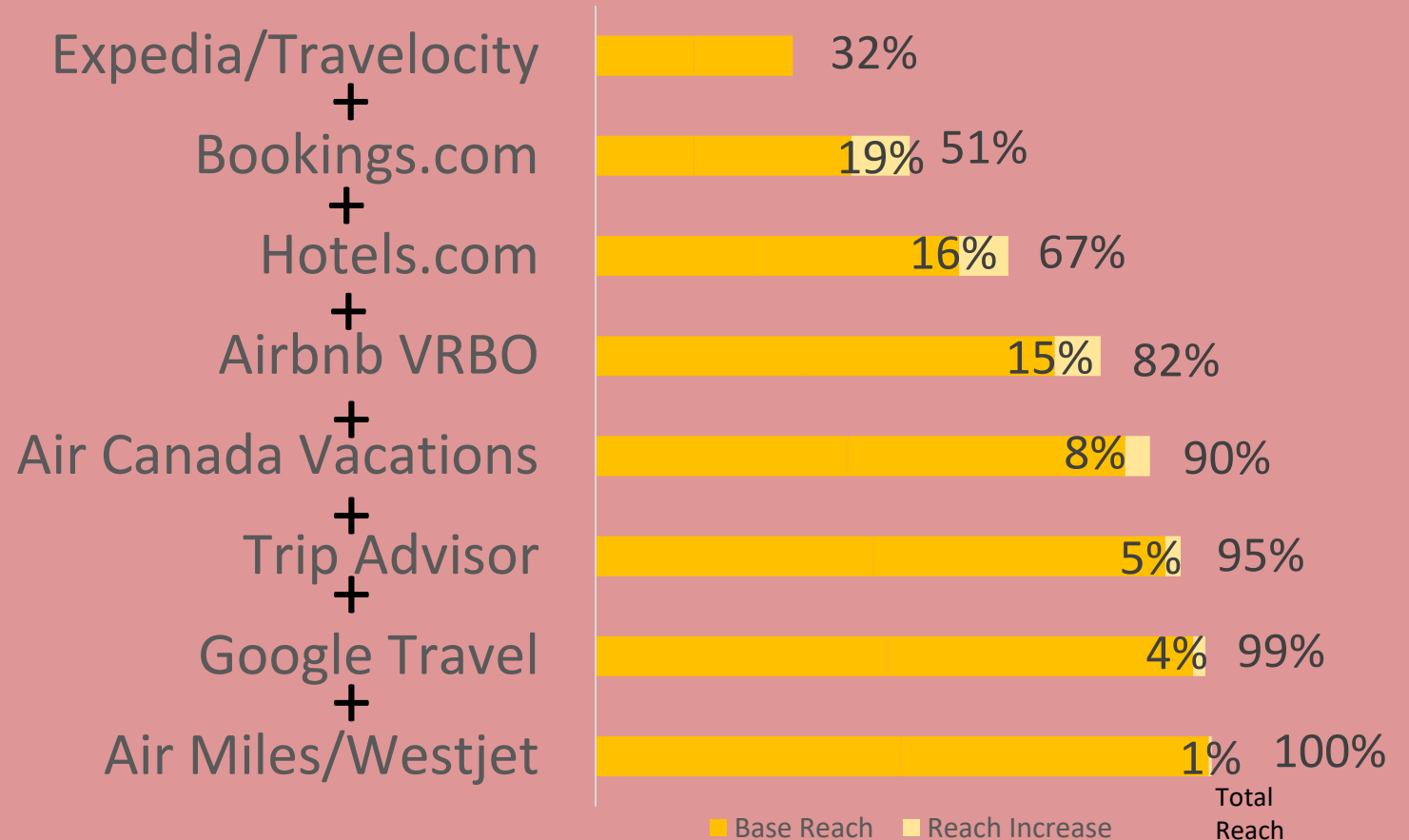
Trip Booking Sites

Maine Overnight Land Visitors 2023

Survey Says:

- Expedia/Travelocity is the dominate trip booking site at 32%.
- 19% more used Bookings.com and 16% more used Hotels.com.
- Airbnb/VRBO added another 15%.
- These 4 sites reach 82% of LAND visitors.

Incremental Reach



Source: XBorder Canada Year-End 2023

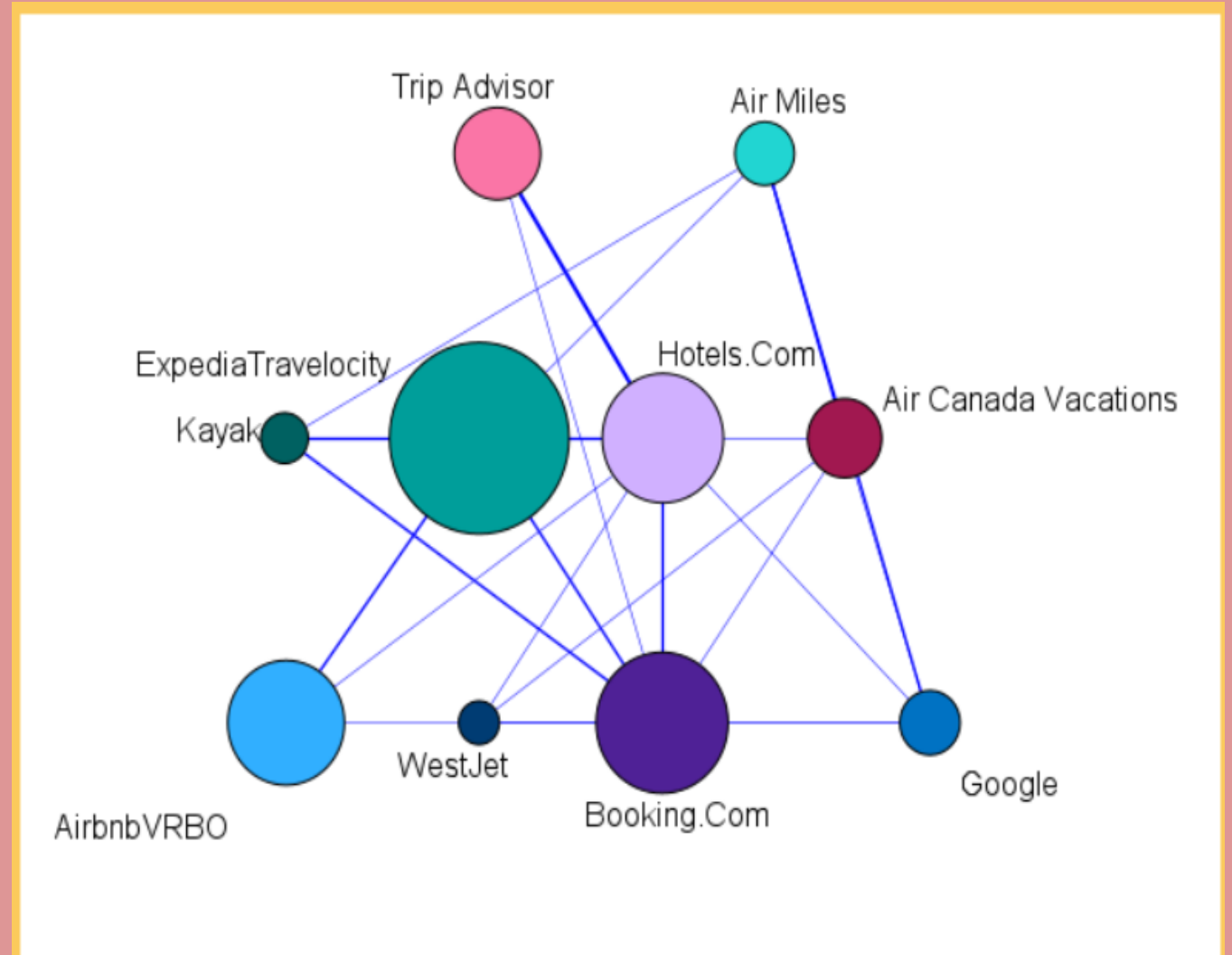


Resource Allocation

Even though Expedia/Travelocity dominate the market, other relationships are in play:

- Trip Advisor correlates with Hotels.com and Booking.com and Kayak.
- Air Miles (a former Air Canada program) continues to be used in conjunction with Air Canada Vacations.

Booking Services Relationship Map





Resource Allocation

Which booking agents is Maine targeting now, and how might this influence future source allocation?

- Currently ME uses a healthy usage of all media, with the idea it is best to go across all platforms and media type
- Currently we are active on Trip Advisor.
- The data on the Booking relationship map provides us with useful information for prioritizing spend. It is interesting to look at other online booking platforms for us like Airbnb/VRBO, Expedia, even Air Canada with Toronto lift.
- This data will help guide our digital tactics and help to maximize spend and reach; native, display, programmatic, social, SEM - BrandUSA Programs-digital content distribution – native programmatic (form of paid advertising in which the ads match the look, feel and function of the media format where they appear)
- This is important because gone are days of big \$ spends on broadcast and print although still look at mix in high awareness tactics and efficient CPM, publications and “in the living room”



Messaging

Survey Says:

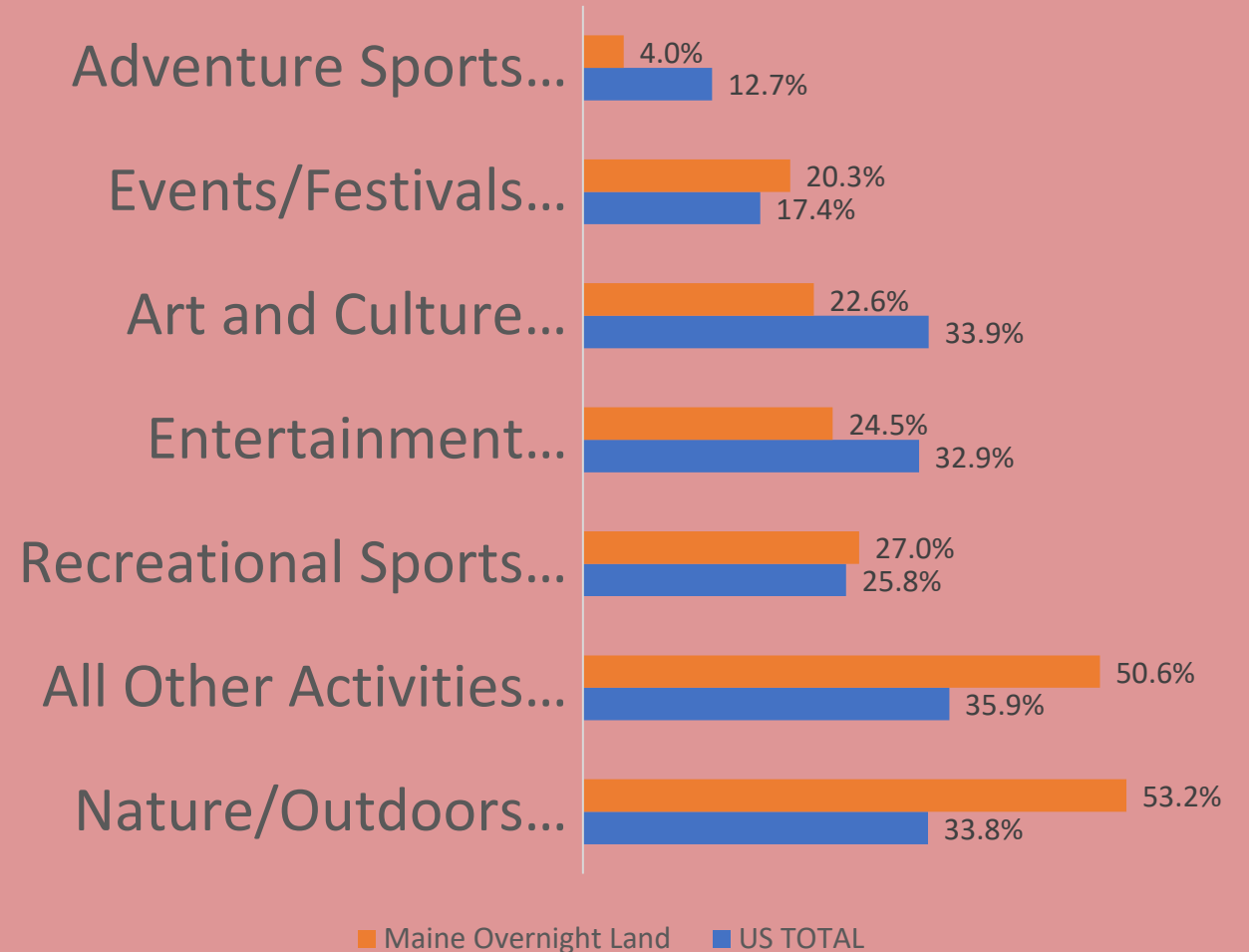
Compared to the U.S. National participation rates, Maine is:

- Under performing in Adventure Sports
- Over performing in Other Activities (VFR, Shopping, etc.)
- Over performing in Nature/Outdoors

Messaging Impact – Opportunities in Adventures Sports

Activity Categories

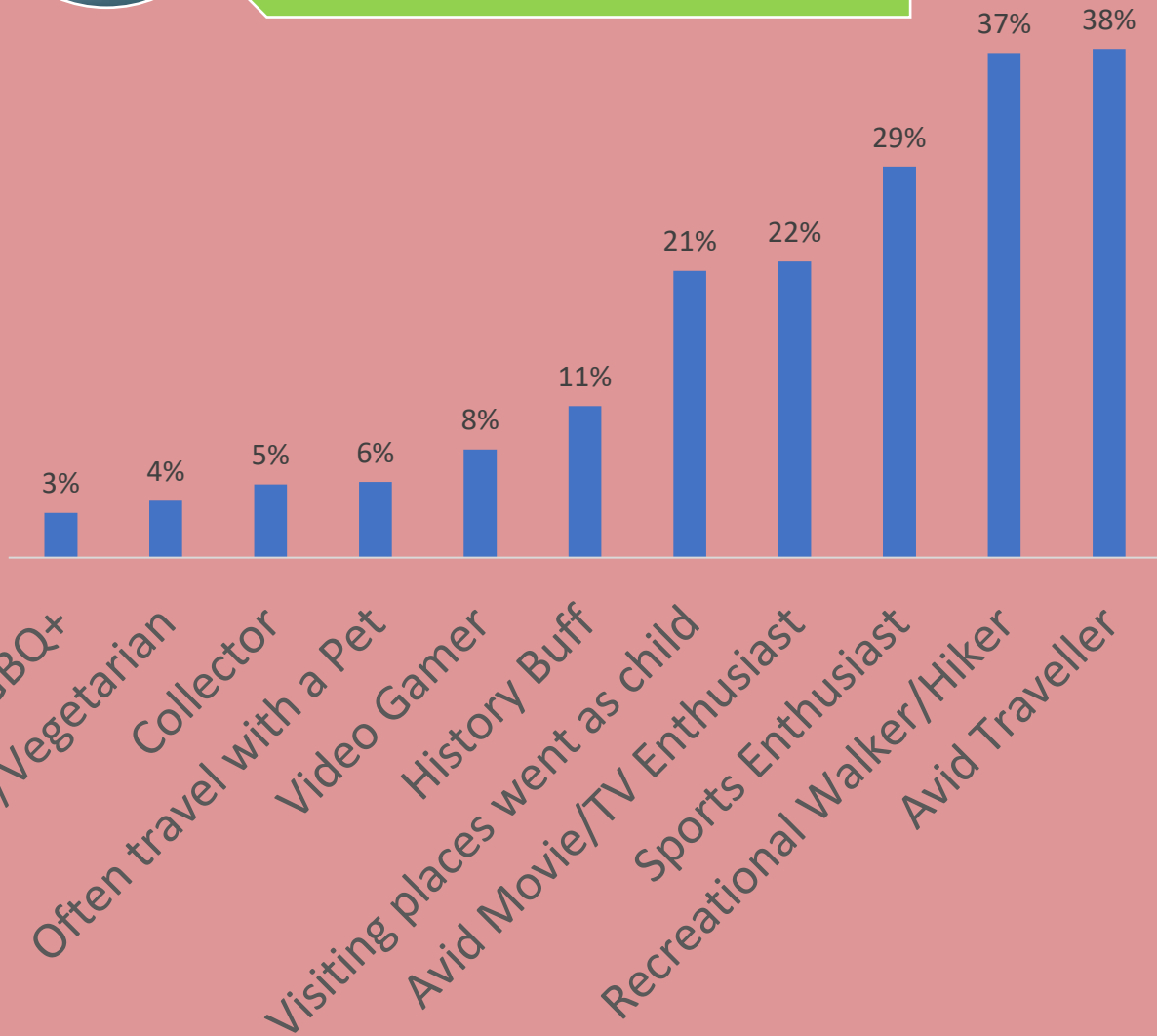
Maine Overnight Land Visitors 2023



Source: XBorder Canada Year-End 2023



Messaging



Source: XBorder Canada Year-End 2023

Lifestyles – Maine Overnight Land Visitors

Difference by Decision Quarter, hint at unique messaging:

	Decision QTR.	INDEX
History Buff	Q1	265
Video Gamer	Q1	140
Walker/Hiker	Q2	223
Public Transportation	Q2	200
Vegan/Vegetarian	Q2	152
Childhood Places	Q2	138
Movie/TV Enthusiast	Q2	124
Sports Enthusiast	Q3	201
Collector	Q3	161
Traveling with a Pet	Q3	159
LGBTQ+	Q3	115
Avid Traveler	Q4	149
Public Transportation	Q4	141
Collector	Q4	131



Messaging

Which activity groups is Maine targeting now, and how might this influence future messaging?

- The data value for messaging in this analysis helps us understand the visitors point of view.
- Product and creative matches what visitor seeks
- Targeting for us – start with travel intenders go to geo-targeting then to overlays by season which gets at behavioral attributes for contextual targeting
- Knowing we have an opportunity to improve on Adventure Sports is perfect opportunity to do AB testing in market via digital – 8 weeks – optimize and shift via results
- This also helps verify we need to look at targeting younger demographic – average age 50 now

Other Potential Analytics

Review profiles based on Decision month

- Location
 - Province of origin
 - Urban/Suburban
 - Rural
 - Zip Code Level
- Lifestyles
- Participation in activities
- Monthly Future Travel Intentions
- Create a MMM (Marketing Mix Model) dashboard simulator to test a variety of spend scenarios (utilizing previous advertising spend data).

Thank You

Questions?



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