

Maine Office of Tourism Visitor Tracking Research 2013 Calendar Year Annual Report

Regional Insights: Maine Highlands

Prepared by



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Research Objectives and Methodology

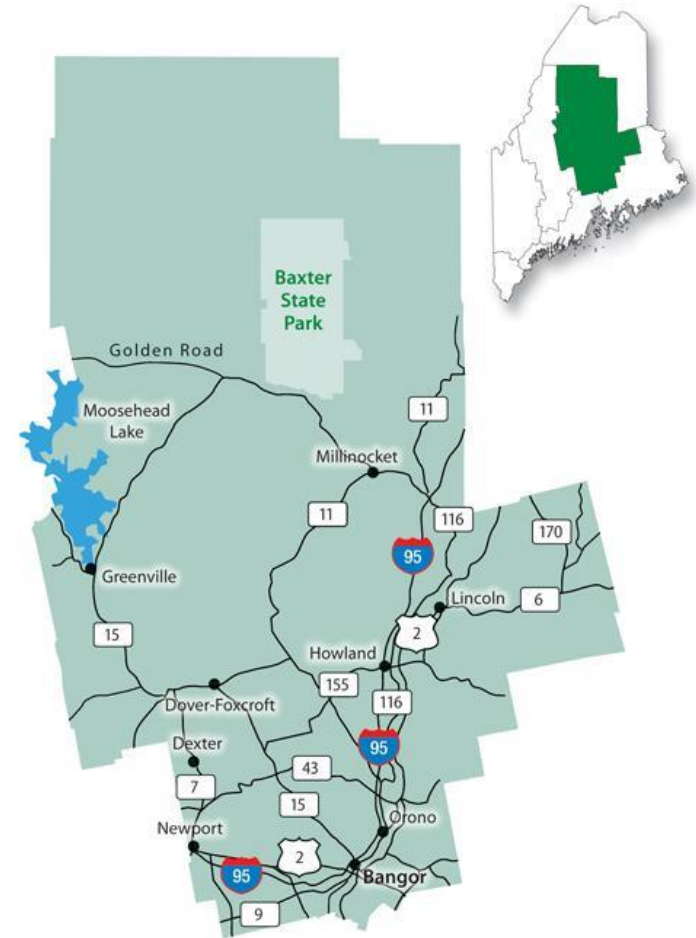


Research Objectives and Methodology

- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors. The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the ResearchNow 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.
- This report outlines results from calendar year 2013, with travel occurring between January 2013 and December 2013. Data was collected between January 1st and December 15th, 2013. The number of completed statewide surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,675
 - Maine Day Visitor – 1,685
 - National Omnibus Survey – 17,591

Research Objectives and Methodology

- The following report includes data on visitors to the Maine Highlands tourism region.
 - 297 overnight visitors, and
 - 144 day visitors.
- Throughout this report, a significant increase from the previous year is indicated by **green** text, and a significant decrease from the previous year is indicated by **red** text.



Overnight Visitors: *Traveler Description*



Overnight Visitor Demographics

- Overnight visitors to the Maine Highlands region are slightly younger and less affluent than overnight visitors to the State of Maine as a whole.

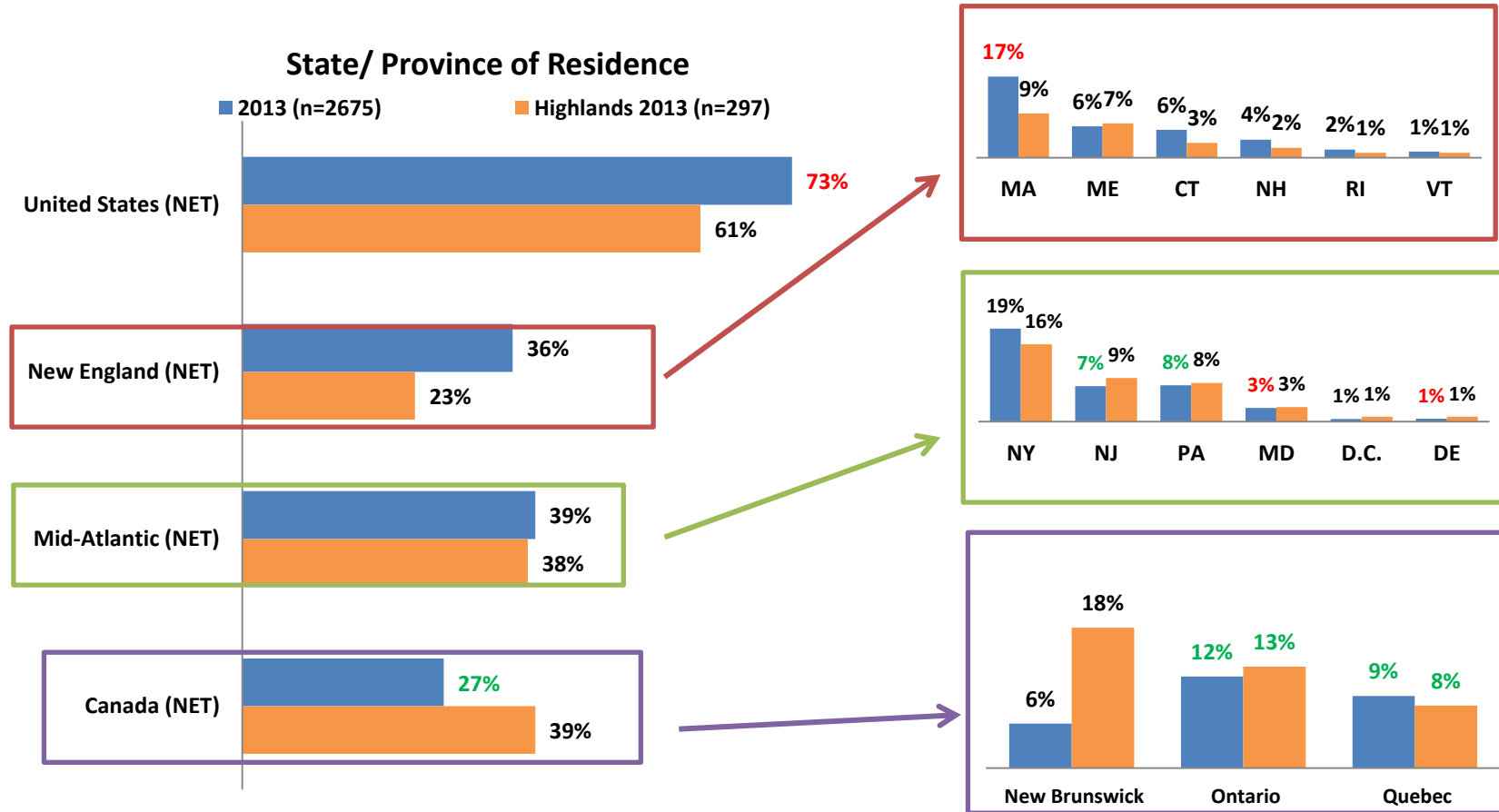
Overnight Visitors	Maine 2013 (n=2675)	Maine Highlands 2013 (n=297)
Age:		
< 35	25%	<31%>
35 - 44	17%	19%
45 - 54	22%	25%
55 +	<35%>	25%
Mean Age (Years)	47.1	44.1
Income:		
< \$50,000	11%	<16%>
\$50,000 - \$99,000	33%	35%
\$100,000 +	<45%>	39%
Mean Income (Thousands)	\$115,427	\$107,800
Female	47%	43%
College Degree or Higher	<81%>	75%
Married	60%	61%
Employed Full Time	68%	71%

<> indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Canada and the Mid-Atlantic region of the U.S. source the greatest proportion of overnight visitors to the Highlands region.

- Individually, New York, New Brunswick, and Ontario send the greatest proportions of overnight visitors to the Maine Highlands region.

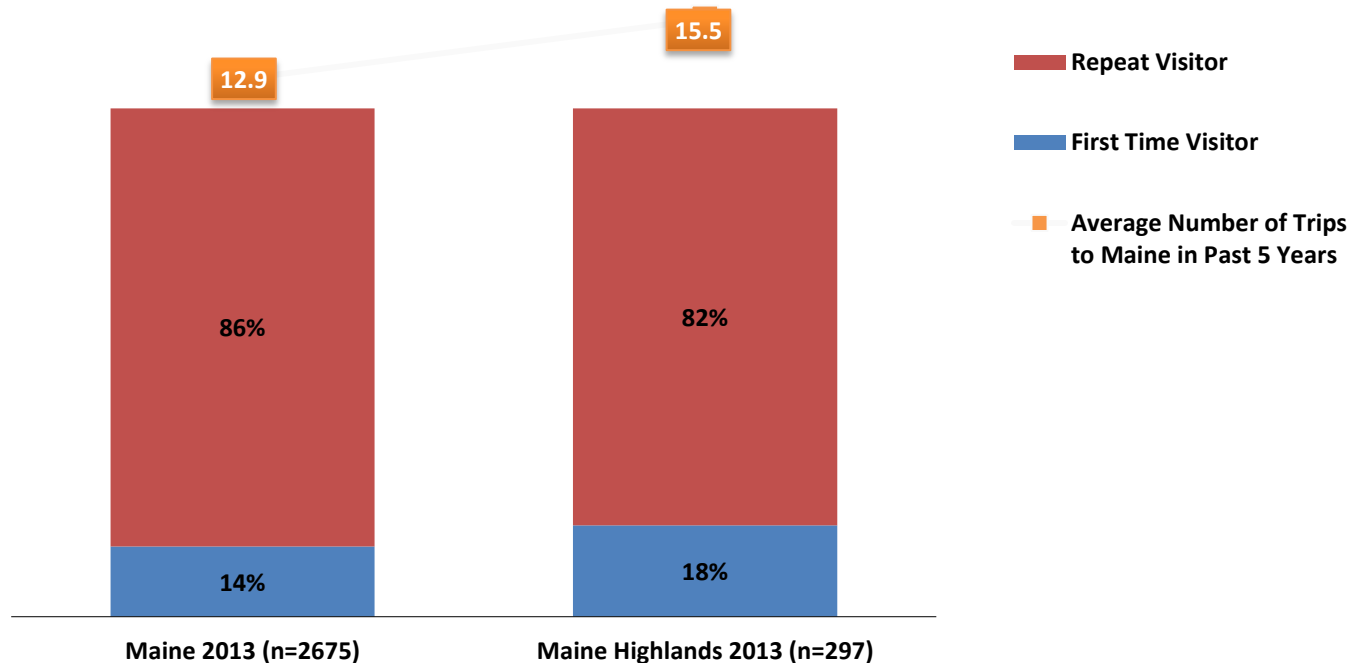


State/ Province of Residence

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Four in five overnight visitors to the Maine Highlands region are repeat visitors.

Repeat vs. First Time Visitors



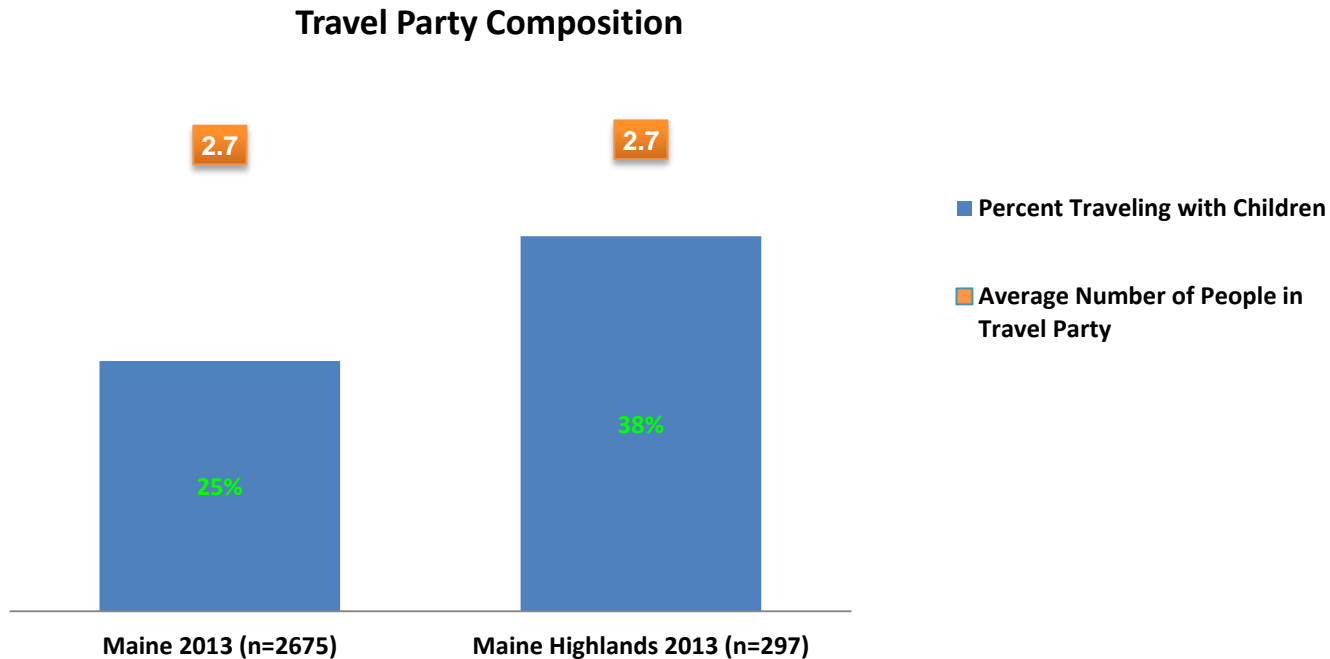
Regional Q9. Was this your first visit in Maine?

Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two in five overnight visitors to the Maine Highlands region are traveling with children.

- The proportion of overnight visitors traveling to the Maine Highlands region with children (38%) is higher than the proportion for the State of Maine as a whole, and also higher than in 2012 (25%).



Regional Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Regional Q25. How many of these people were: Children?

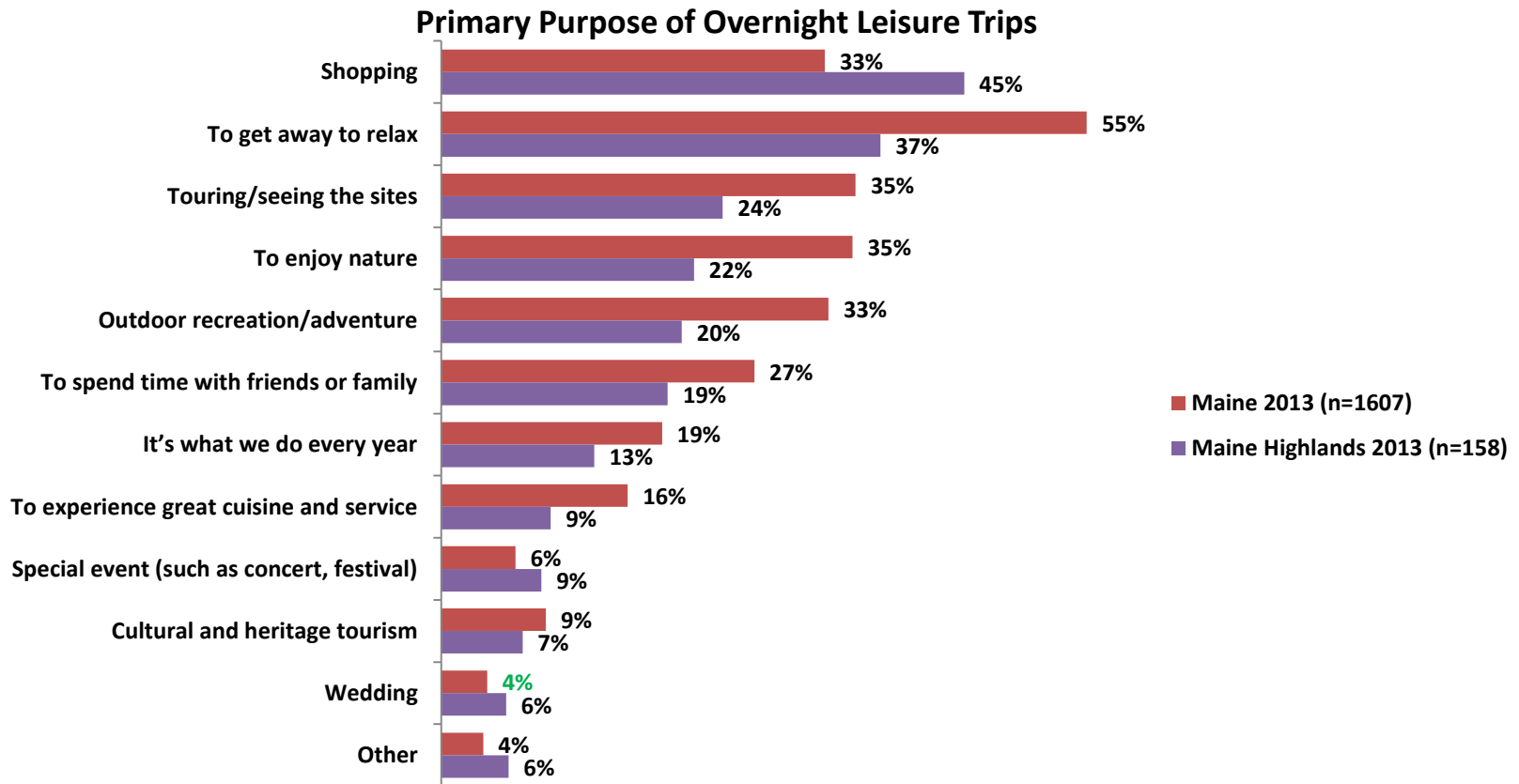
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



Shopping was the most frequently cited purpose for visiting the Maine Highlands region among overnight visitors.

- Shopping is more likely to be a primary purpose among Maine Highlands visitors than among visitors to the State of Maine as a whole.
- Getting away to relax, touring/seeing the sites, enjoying nature, and outdoor recreation are *less* likely trip purposes among Maine Highlands visitors.



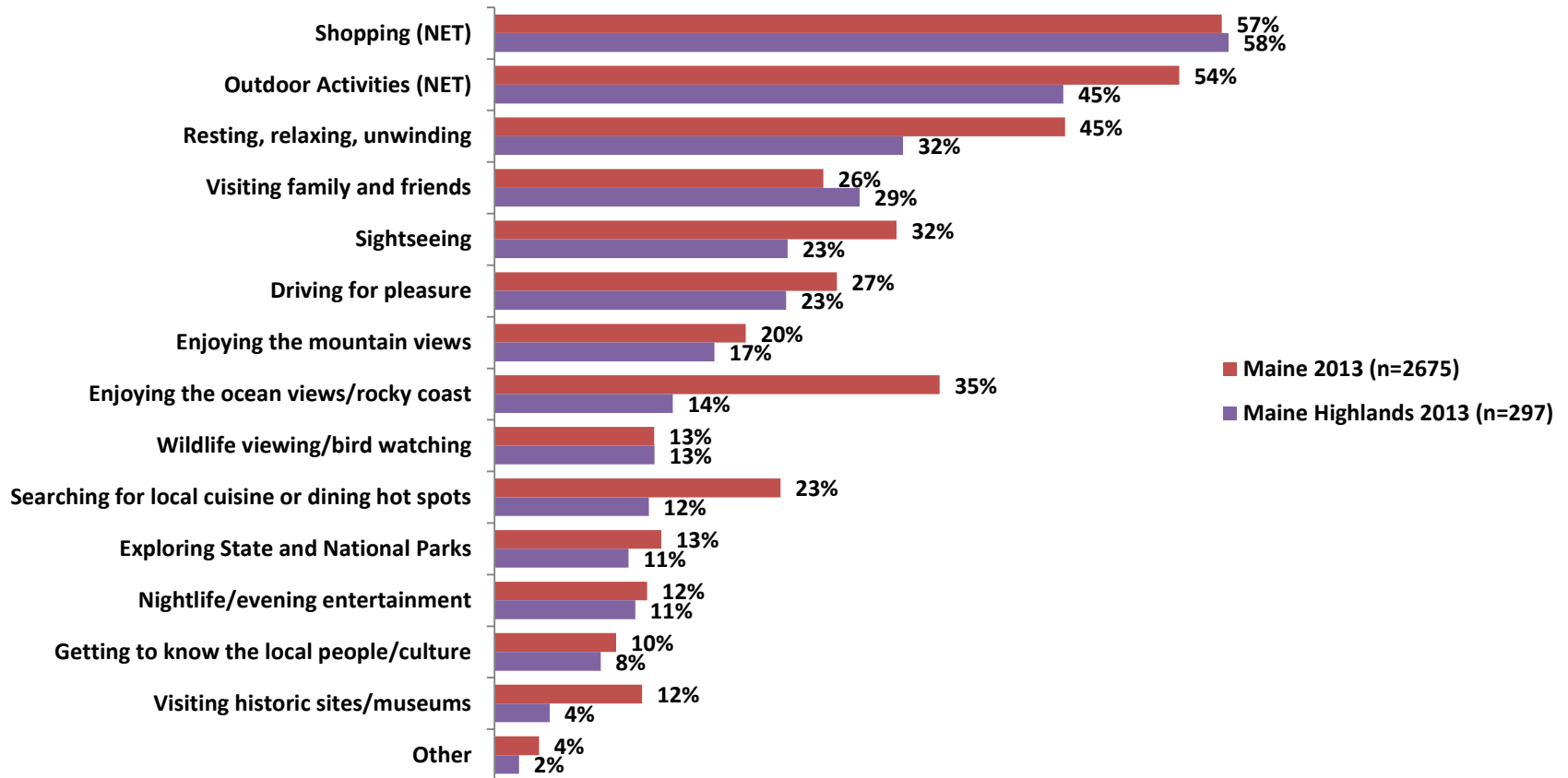
Regional Q7. What was the primary purpose of your most recent trip in Maine?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Shopping is the most popular trip activity among overnight visitors to the Maine Highlands region.

- Compared to visitors to the State of Maine as a whole, visitors to the Maine Highlands region are *less* likely to be participating in outdoor activities, resting/relaxing/unwinding, enjoying the ocean views, sightseeing, and searching for local cuisine.

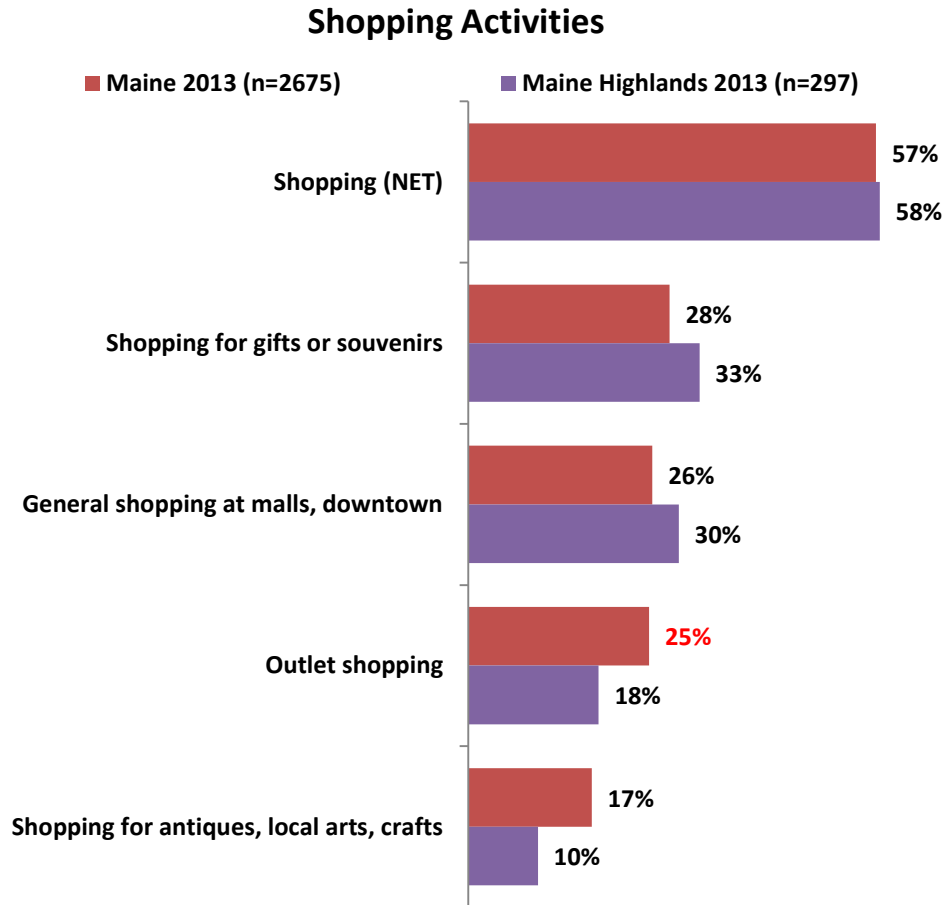
Top Trip Activities



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

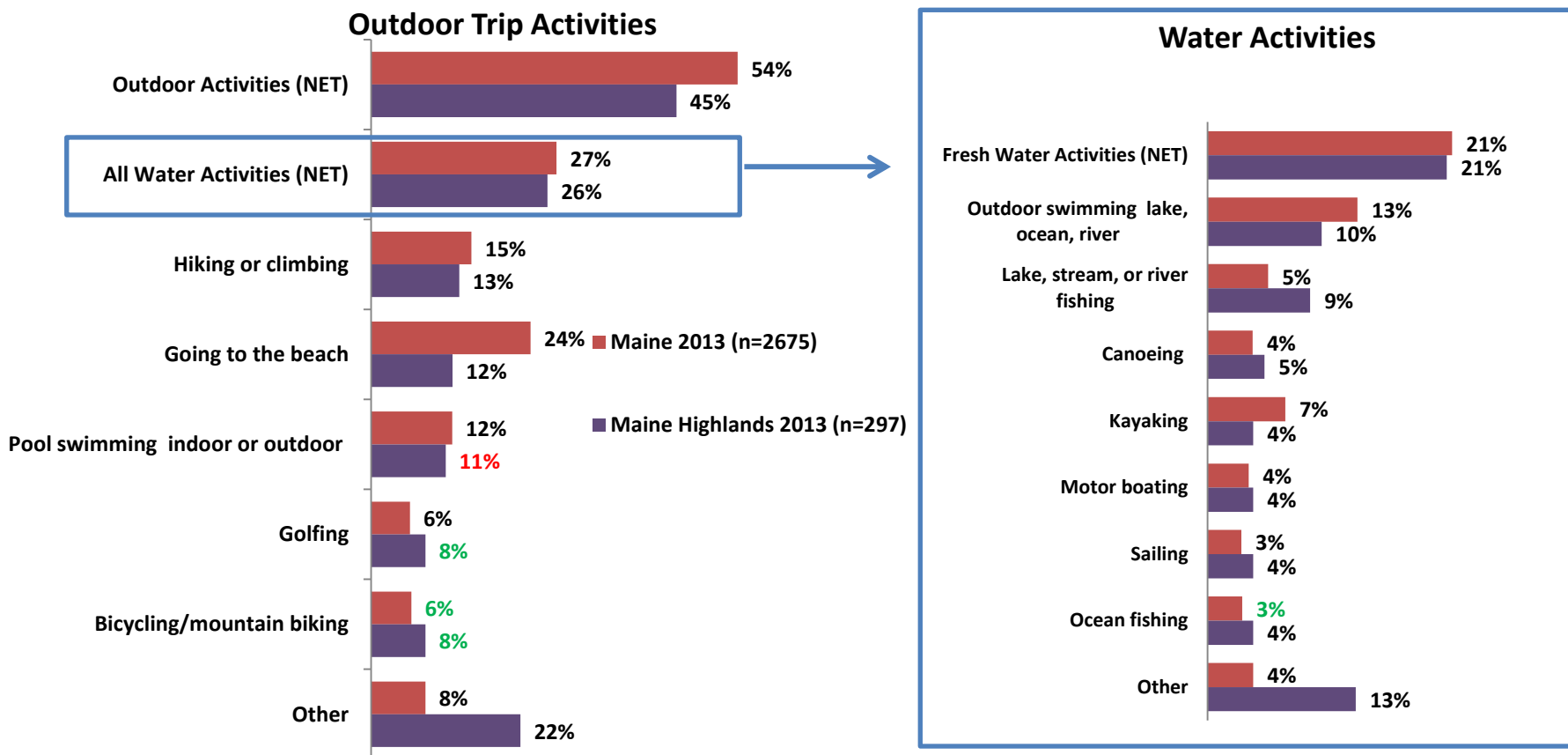
Shopping for gifts/souvenirs and general mall/ downtown shopping are the most popular shopping activities.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

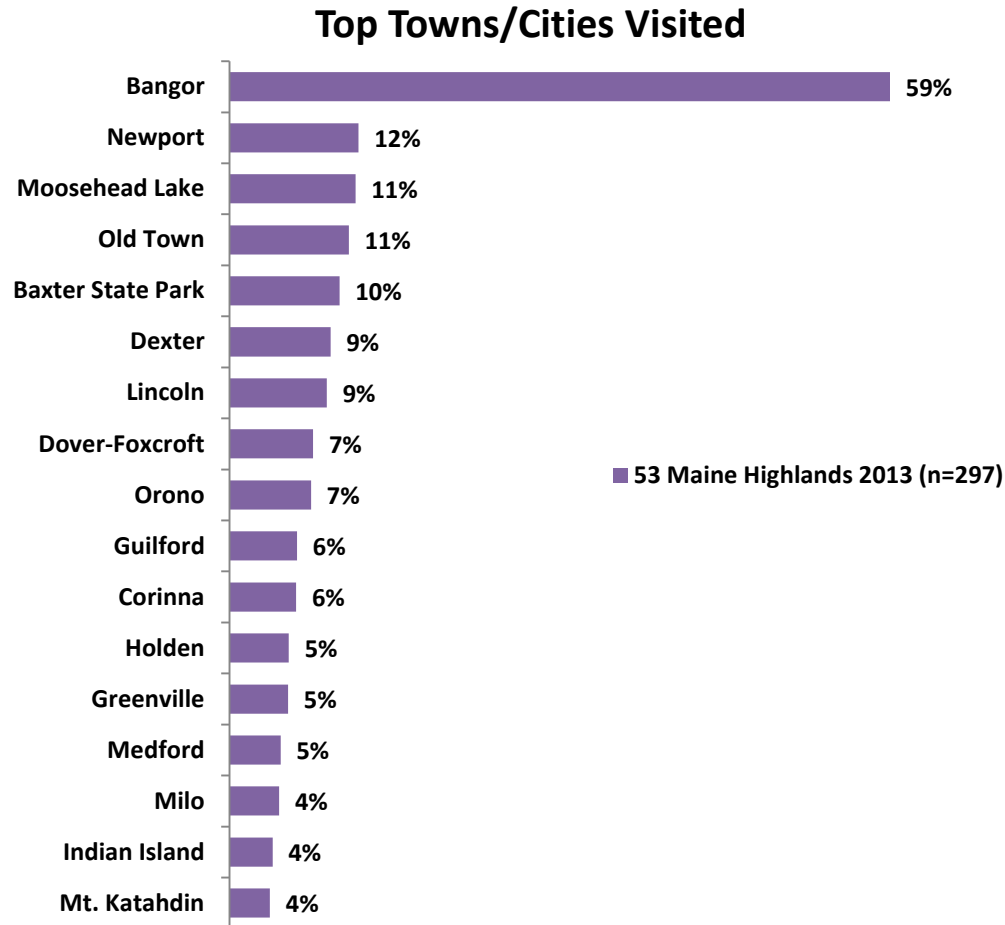
The most popular outdoor activities in this region are fresh water activities – swimming, fishing, boating, etc.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Bangor is by far the most frequently visited town/city by overnight visitors to the Maine Highlands region.

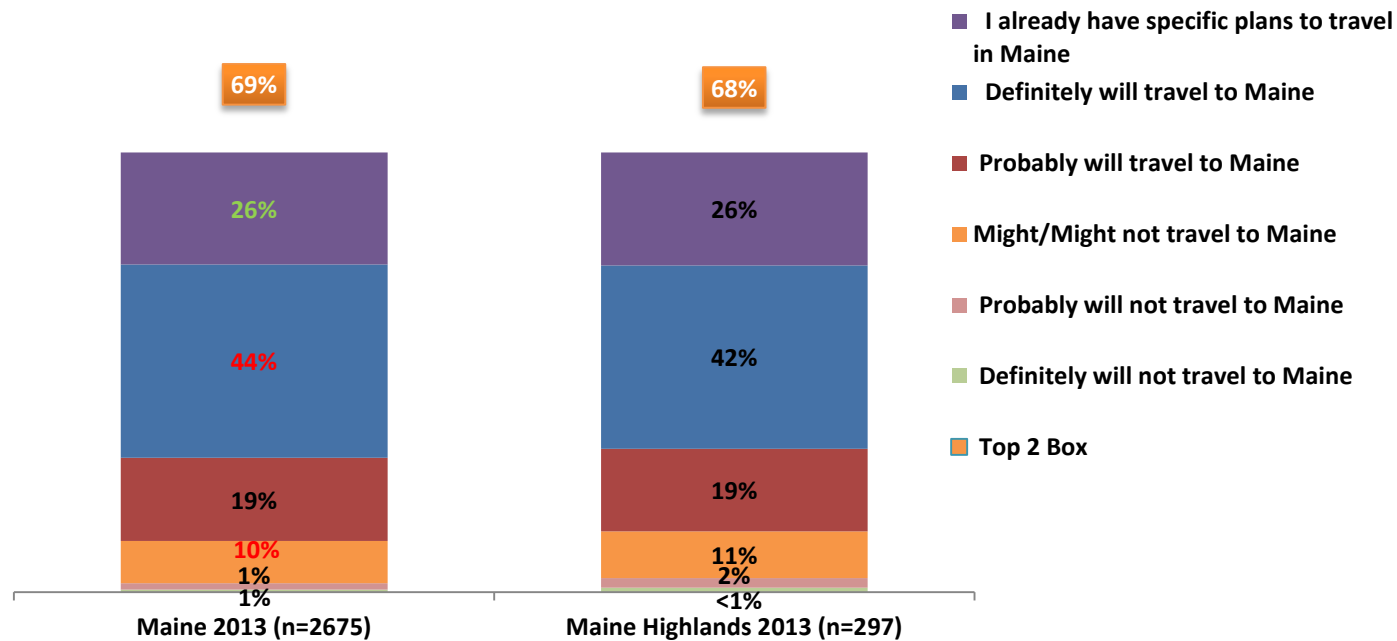


Regional Q31: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two-thirds of overnight visitors to the Maine Highlands region plan to travel to Maine again.

Future Travel Likelihood



Regional Q37. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Maine Highlands region are slightly less affluent than day visitors to the State of Maine as a whole.

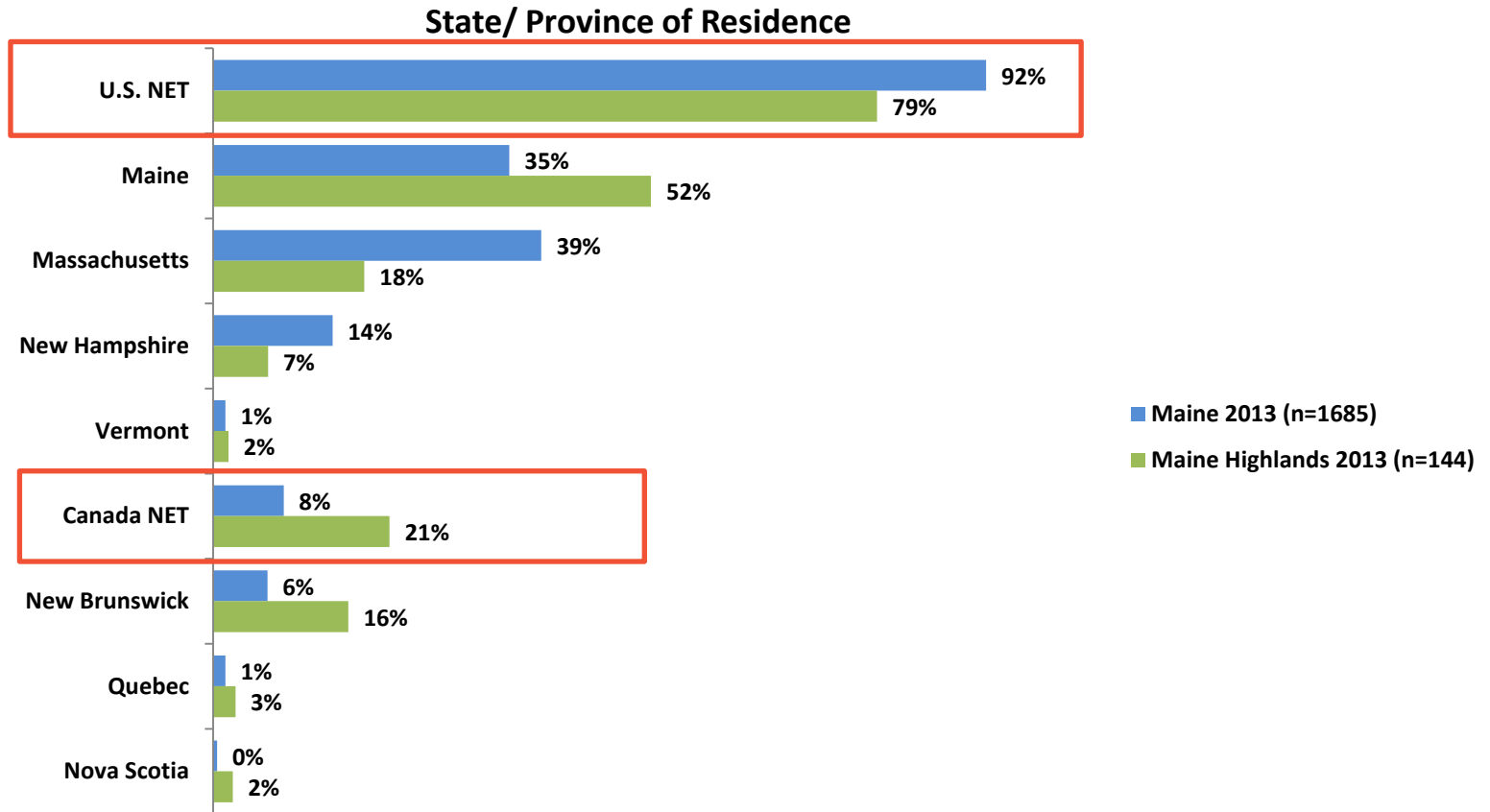
Day Visitors	Maine 2013 (n=1685)	Maine Highlands 2013 (n=144)
Age:		
< 35	20%	27%
35 - 44	15%	13%
45 - 54	25%	25%
55 +	40%	35%
Mean Age (Years)	49.0	47.4
Income:		
< \$50,000	19%	<29%>
\$50,000 - \$99,000	42%	47%
\$100,000 +	<38%>	25%
Mean Income (Thousands)	\$98,010	\$81,540
Female	<54%>	43%
College Degree or Higher	71%	69%
Married	66%	65%
Employed Full Time	63%	61%

<> indicates a significant difference between subgroups at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of day visitors to the Maine Highlands region are in-state visitors.

- Canada supplies one-fifth of the day visitors to the Maine Highlands region, significantly more than for the State of Maine as a whole. New Brunswick is Canada's strongest source of visitors to this region.
- The Maine Highlands region attracts a greater proportion of day visitors from Maine than the State of Maine as a whole and a lesser proportion from Massachusetts.

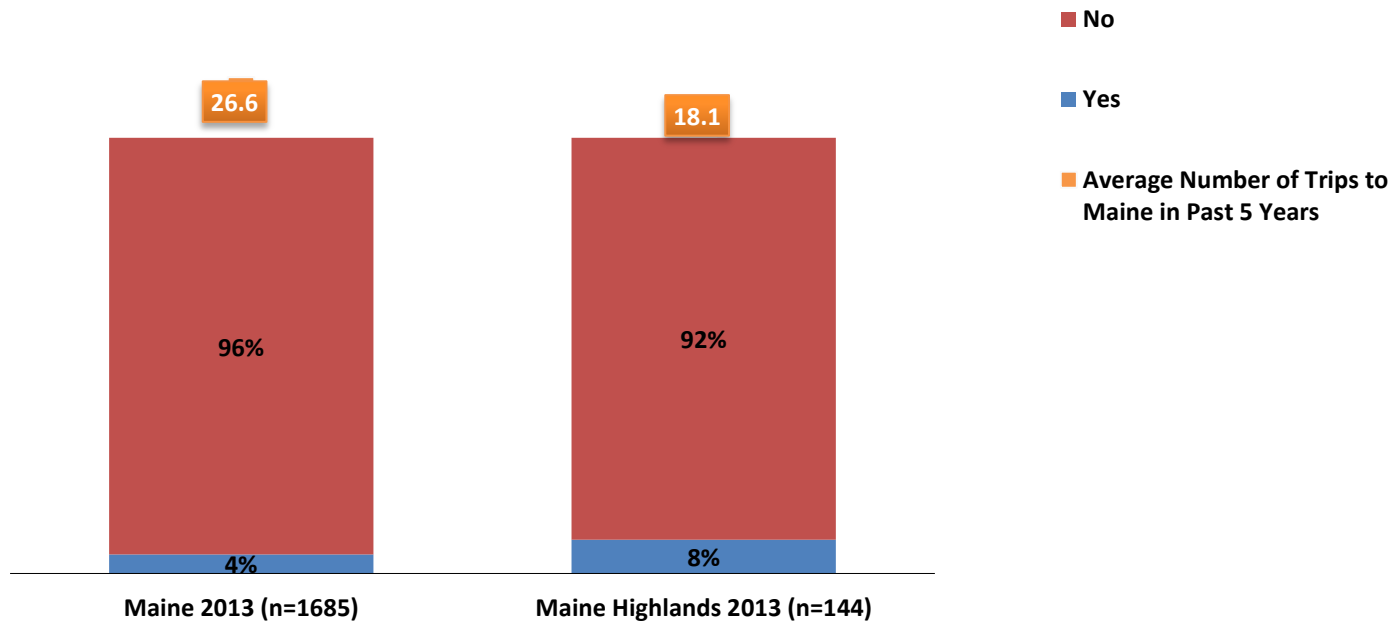


Day Q1A. In what State or Province do you reside?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nine in ten day visitors to the Maine Highlands region are repeat visitors.

Repeat vs. First Time Visitors



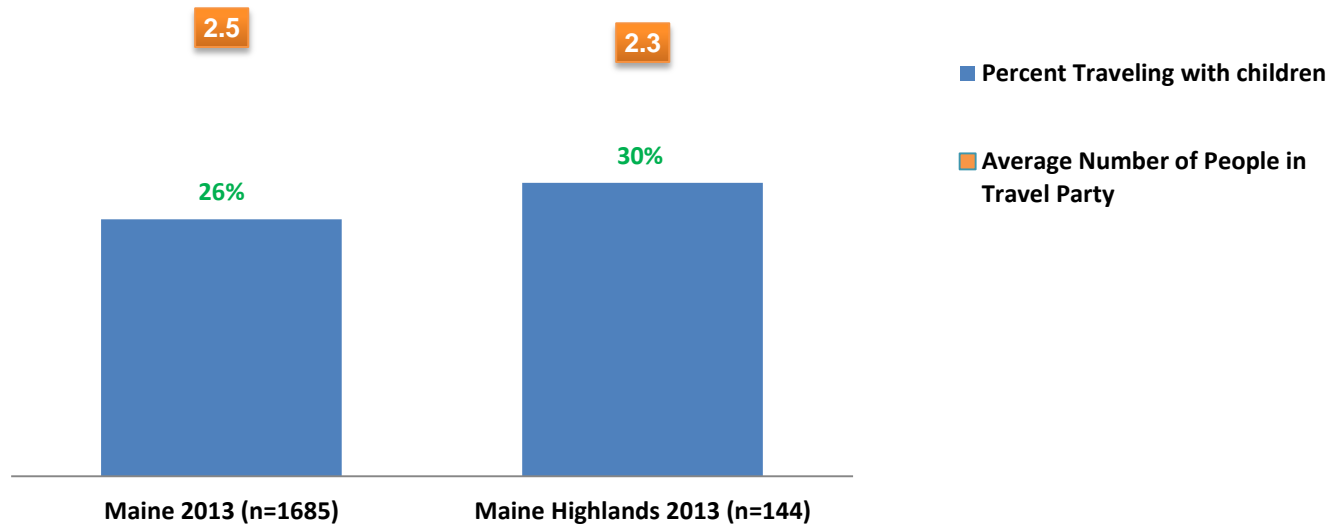
Day Q4. Was this your first trip to Maine?

Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nearly one-third of day visitors to the Maine Highlands region are traveling with children.

Travel Party Composition



Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q8. How many of these people were: Children

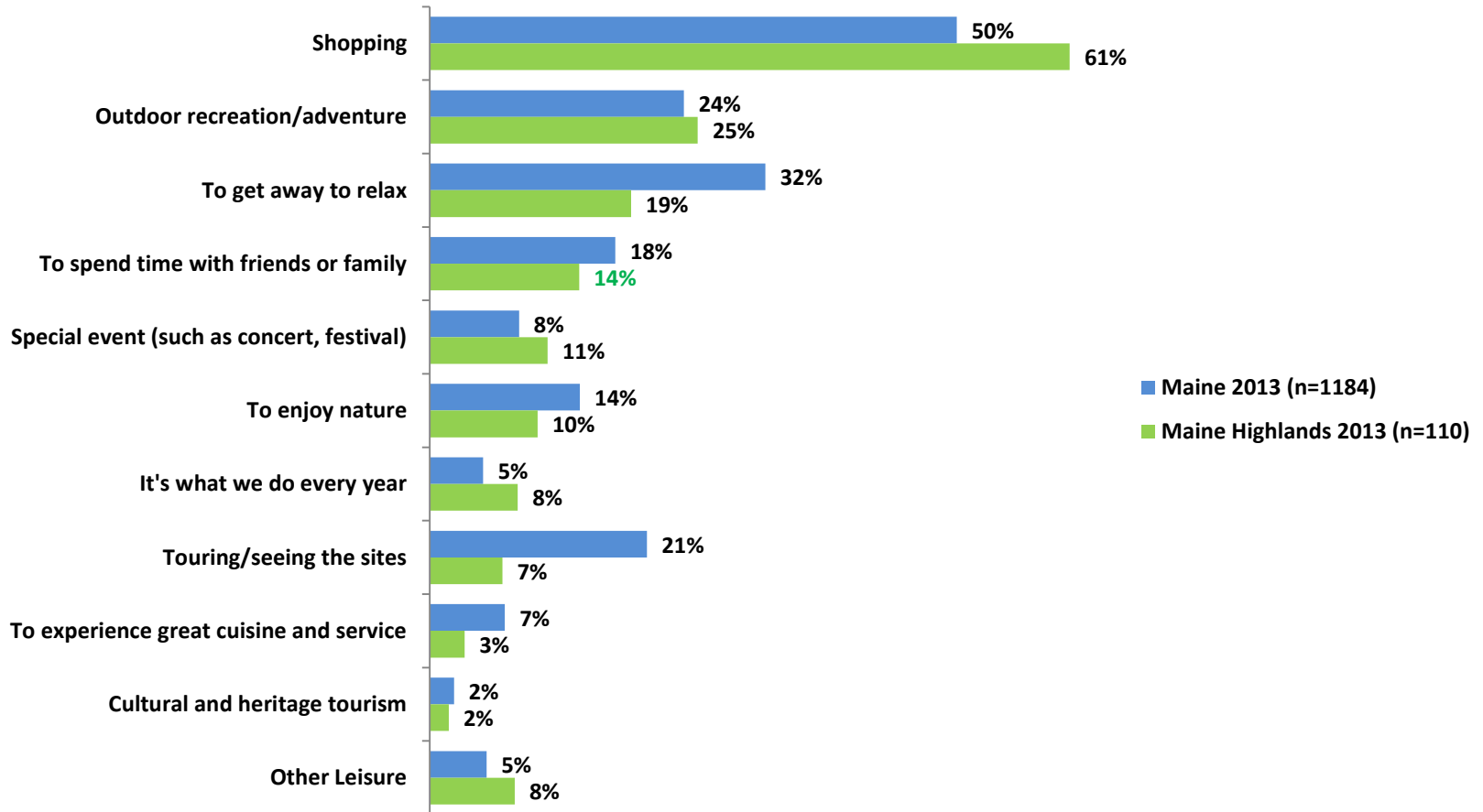
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Shopping was the primary trip purpose for nearly two-thirds of day visitors to the Maine Highlands region.

Primary Purpose of Leisure Day Trips

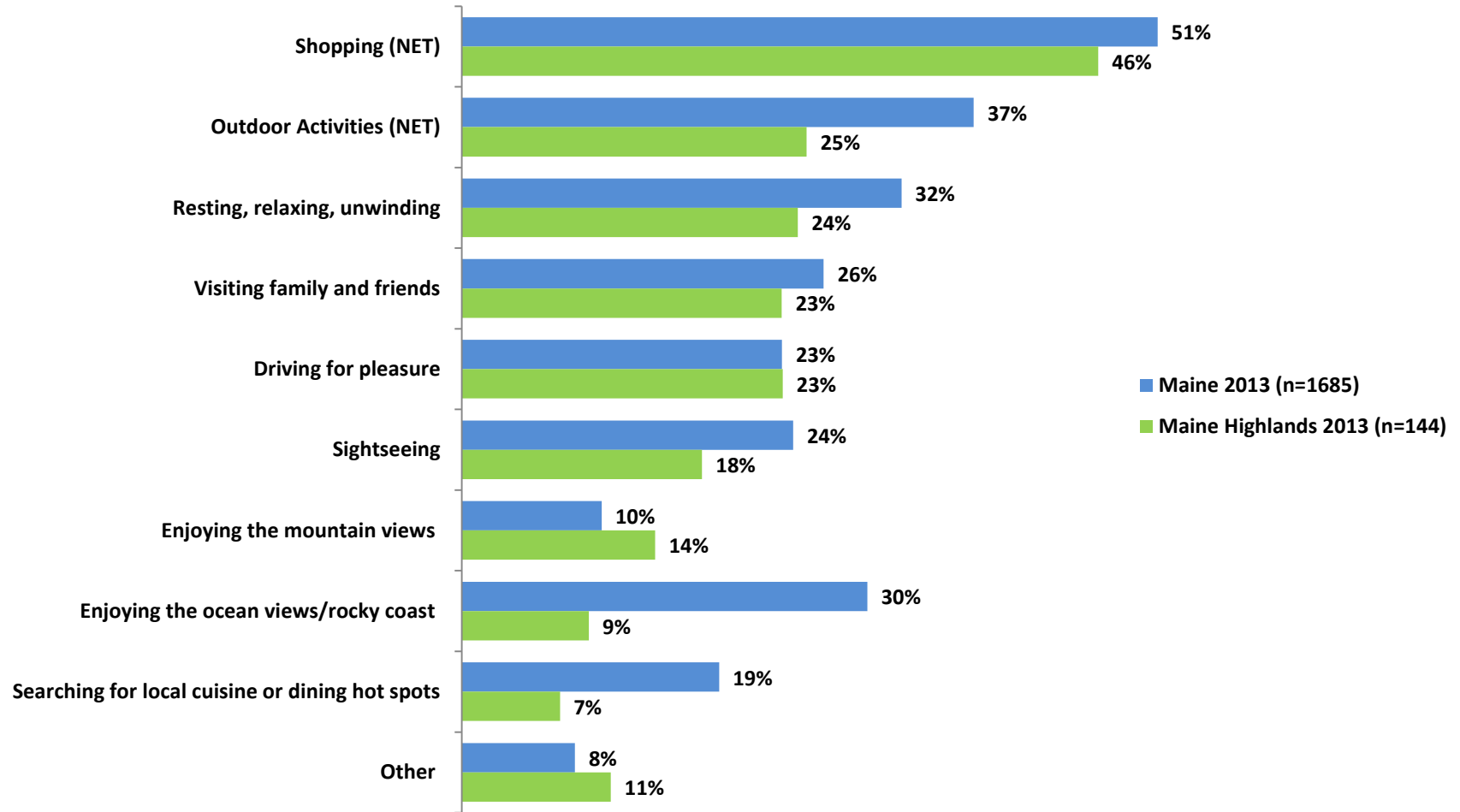


Day Q3. What was the primary purpose of your most recent trip in Maine?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Following on their primary trip purpose, nearly half of day visitors to this region did some shopping while visiting.

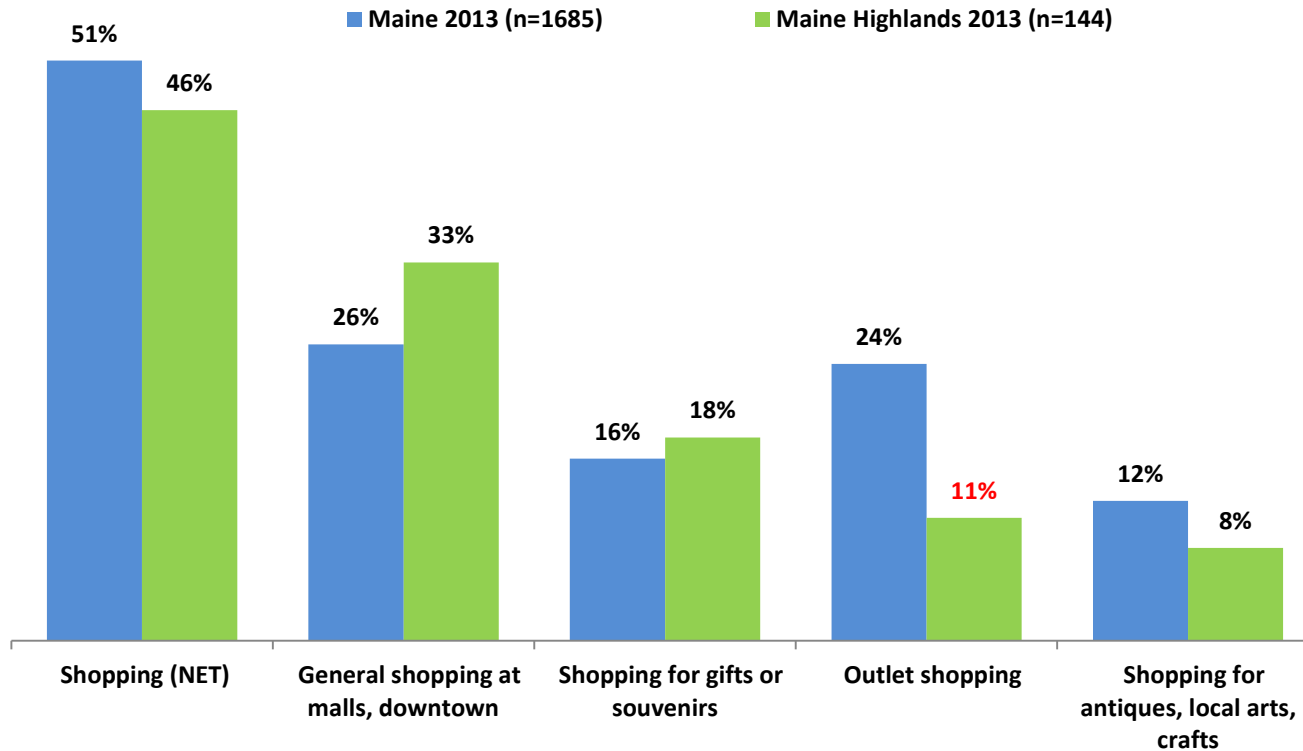
Top Trip Activities



Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Shopping activities mostly centered around general mall/downtown shopping.

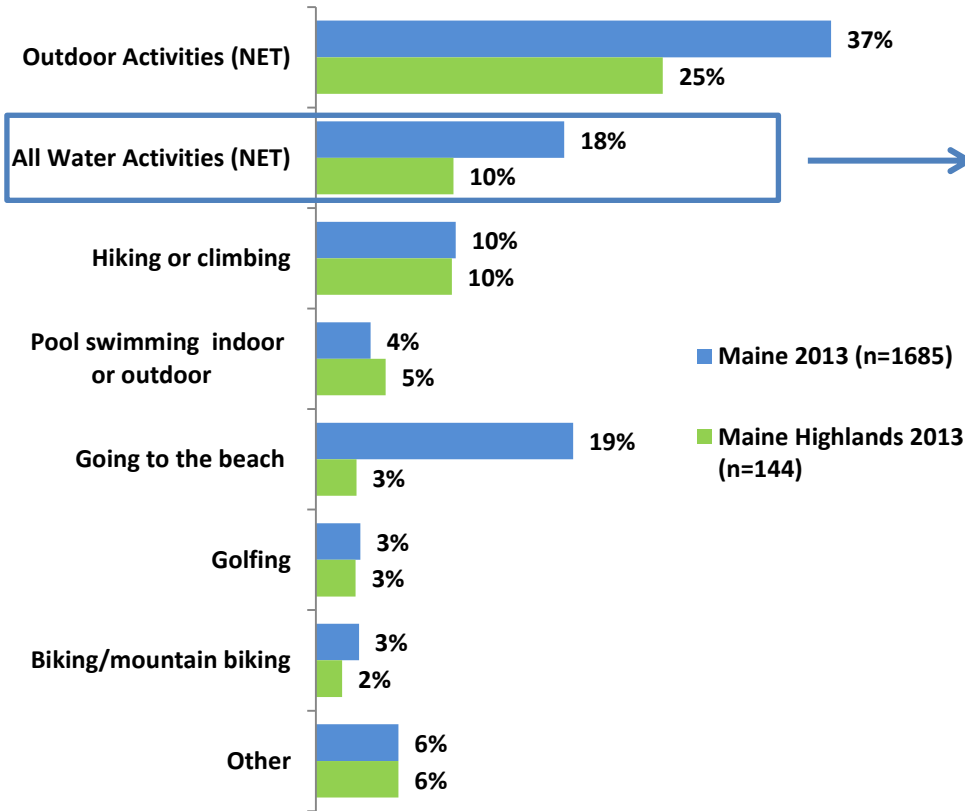
Shopping Activities



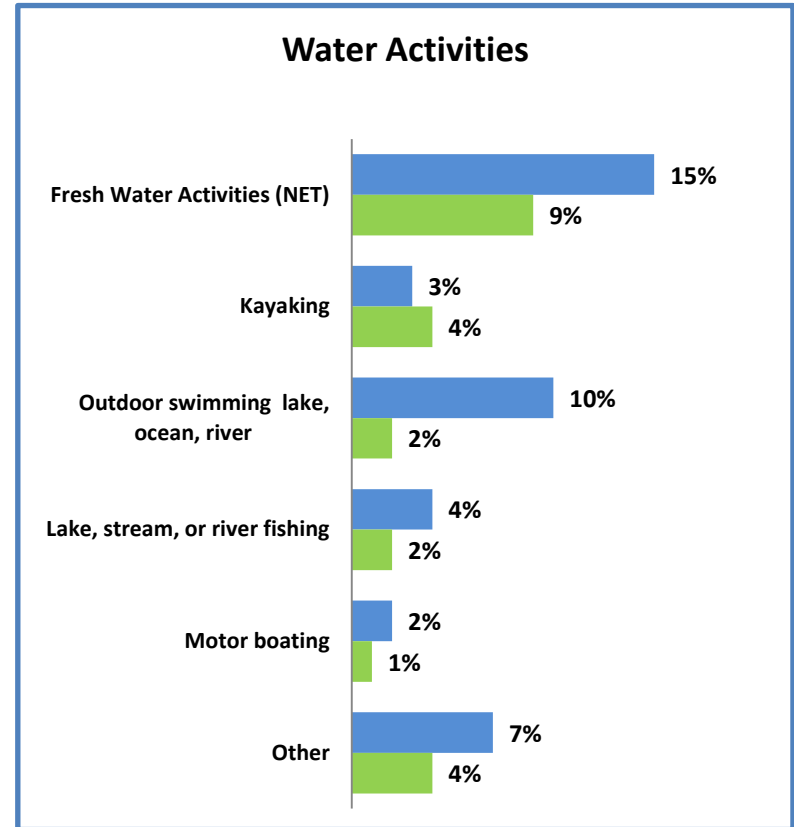
Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outdoor activities mostly involved hiking/climbing and various water activities.

Outdoor Activities

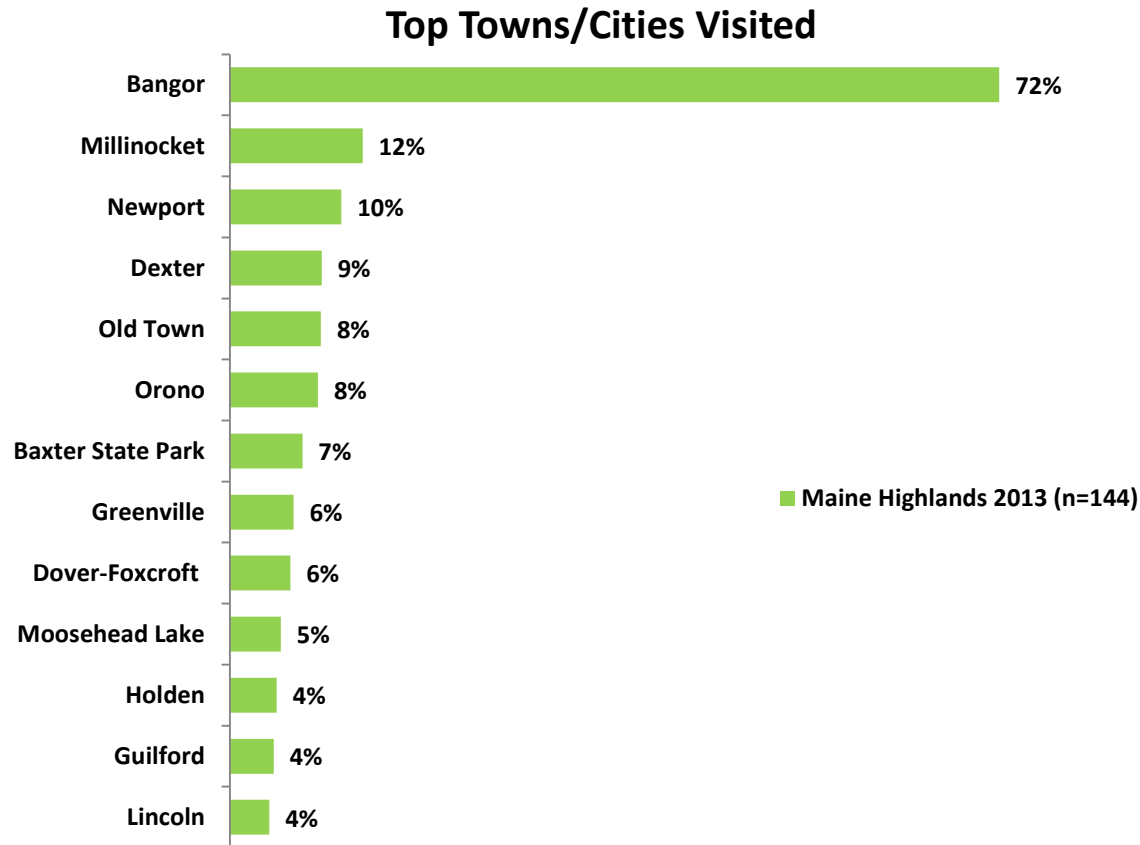


Water Activities



Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Similar to overnight visitors, day visitors to the Maine Highlands region were most likely to visit Bangor.

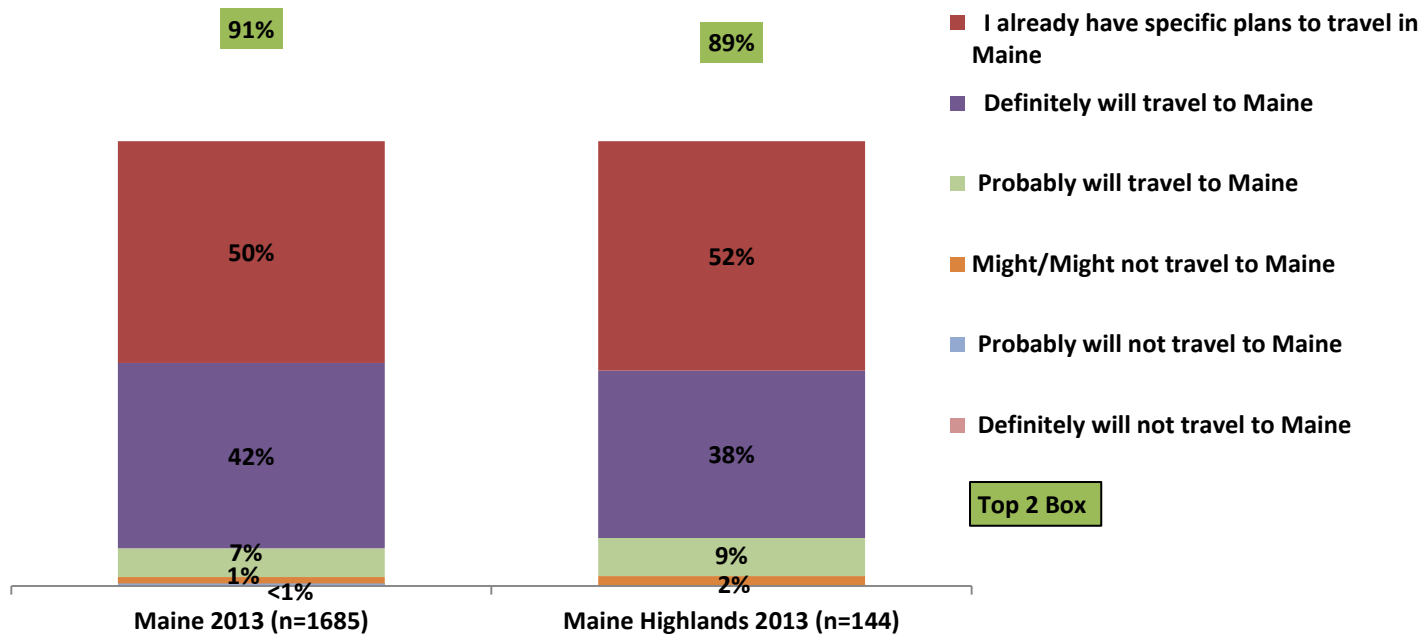


Day Q12: Within the region you visited, what specific towns or cities did you visit?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nine in ten day visitors to the Maine Highlands region plan to travel to Maine again in the future.

Future Likelihood to Travel to Maine



Day Q19. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Comparison of *Maine Highlands* Visitors to Maine Visitors



Comparisons

- Visitors to the Maine Highlands region and visitors to the State of Maine as a whole differ in a few areas. These variations can be seen primarily in the average age and income of visitors, as well as their reasons for traveling and the activities they participate in while visiting.
- Popular trip activities and stated purpose of trips closely follow the shopping opportunities in the Maine Highlands region (Bangor).
- Highlights:
 - **Visitor Origin**
 - A **greater proportion** of overnight and day visitors from **New Brunswick**.
 - A **lesser proportion** of overnight and day visitors from **Massachusetts**.
 - A **greater proportion** of day visitors from **Maine**.
 - **Visitor Demographics**
 - A **lesser proportion** of overnight visitors **over the age of 55**, and a **greater proportion under the age of 35**.
 - A **lesser proportion** of overnight and day visitors **earning \$100,000 or more per year**, and a **greater proportion earning less than \$50,000 per year**.
 - A **lesser proportion** of overnight visitors with a **college degree**.
 - A **greater proportion** of overnight visitors **traveling with kids**.

Comparisons

- Highlights Continued:
 - **Primary Purpose of Trip**
 - Overnight and day visitors **more** likely to be **traveling for shopping**
 - Overnight and day visitors **less** likely to be visiting to:
 - Get away to relax
 - Experience great cuisine
 - Tour/see the sites
 - Overnight visitors **less** likely to be visiting:
 - To enjoy nature
 - For outdoor recreation
 - To spend time with family and friends
 - Because it's what they do every year

Comparisons

- Highlights Continued:
 - **Trip Activities – Overnight and Day Visitors**
 - **Less likely to be:**
 - Resting/relaxing/unwinding
 - Participating in outdoor activities
 - Enjoying the ocean views
 - Searching for local cuisine
 - Going to the beach
 - Outlet shopping
 - **Trip Activities – Overnight Visitors**
 - **Less likely to be:**
 - Sightseeing
 - Visiting historic sites/museums
 - Kayaking
 - Antique shopping



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