

# Maine Office of Tourism Visitor Tracking Research 2014 Calendar Year Annual Report

## *Regional Insights: Maine Highlands*

*Prepared by*



May 2015

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# Research Objectives and Methodology

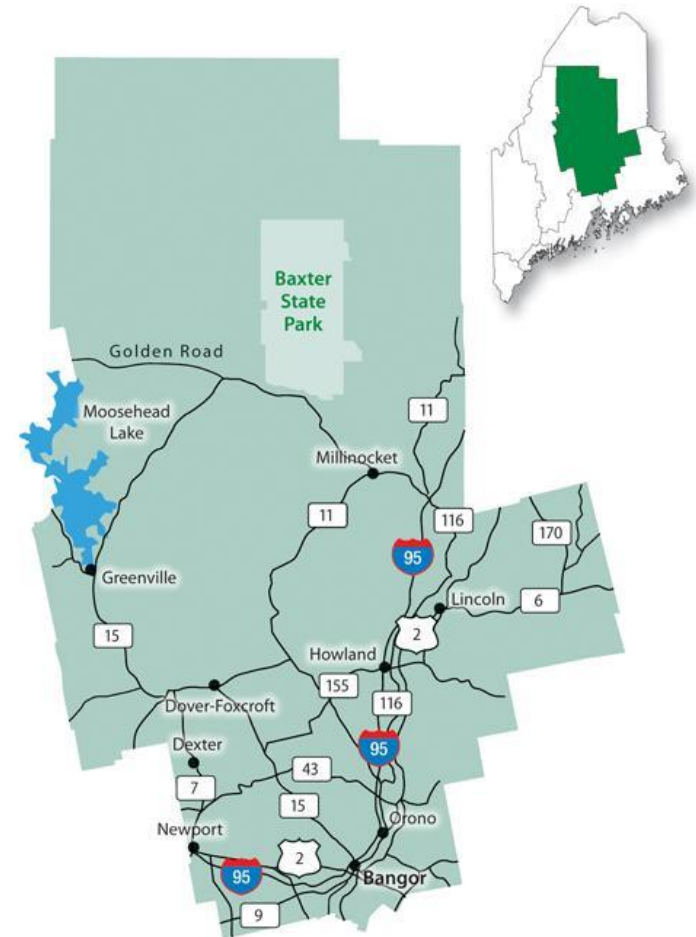


# Research Objectives and Methodology

- 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 two national online panels – Research Now and Instantly (formerly Usamp).
- Information is gathered on an ongoing basis through three surveys:
  - **Maine Overnight Visitor Survey**
    - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada
    - Have taken an overnight trip to Maine in the past four weeks
  - **Maine Day Visitor Survey**
    - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders
    - 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
    - To determine the incidence of travel nationwide and Maine’s share of that travel
- Survey results were collected during calendar year 2014 for travel to Maine occurring from December 2013 through November 2014. The number of respondents participating in each survey is:
  - Maine Overnight Visitor Survey – 2,930
  - Maine Day Visitor – 1,733
  - National Omnibus Survey – 17,675

# Research Objectives and Methodology

- The following report summarizes the results among visitors to the Maine Highlands tourism region during 2014, including:
  - 381 overnight visitors, and
  - 144 day visitors.
- Throughout this report, data for the Maine Highlands tourism region will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by < >.
- Statistically significant differences between 2013 and 2014 are also highlighted for both the Maine Highlands region and the State of Maine. A statistically 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 tourism region are about 41 years old, on average, and have annual household incomes that average around \$98,000. Three-fourths have at least a college degree and 61% are married. Nearly two-thirds are employed full-time.
- Overnight visitors to the Maine Highlands on average are younger and have a lower household income than visitors to Maine overall.

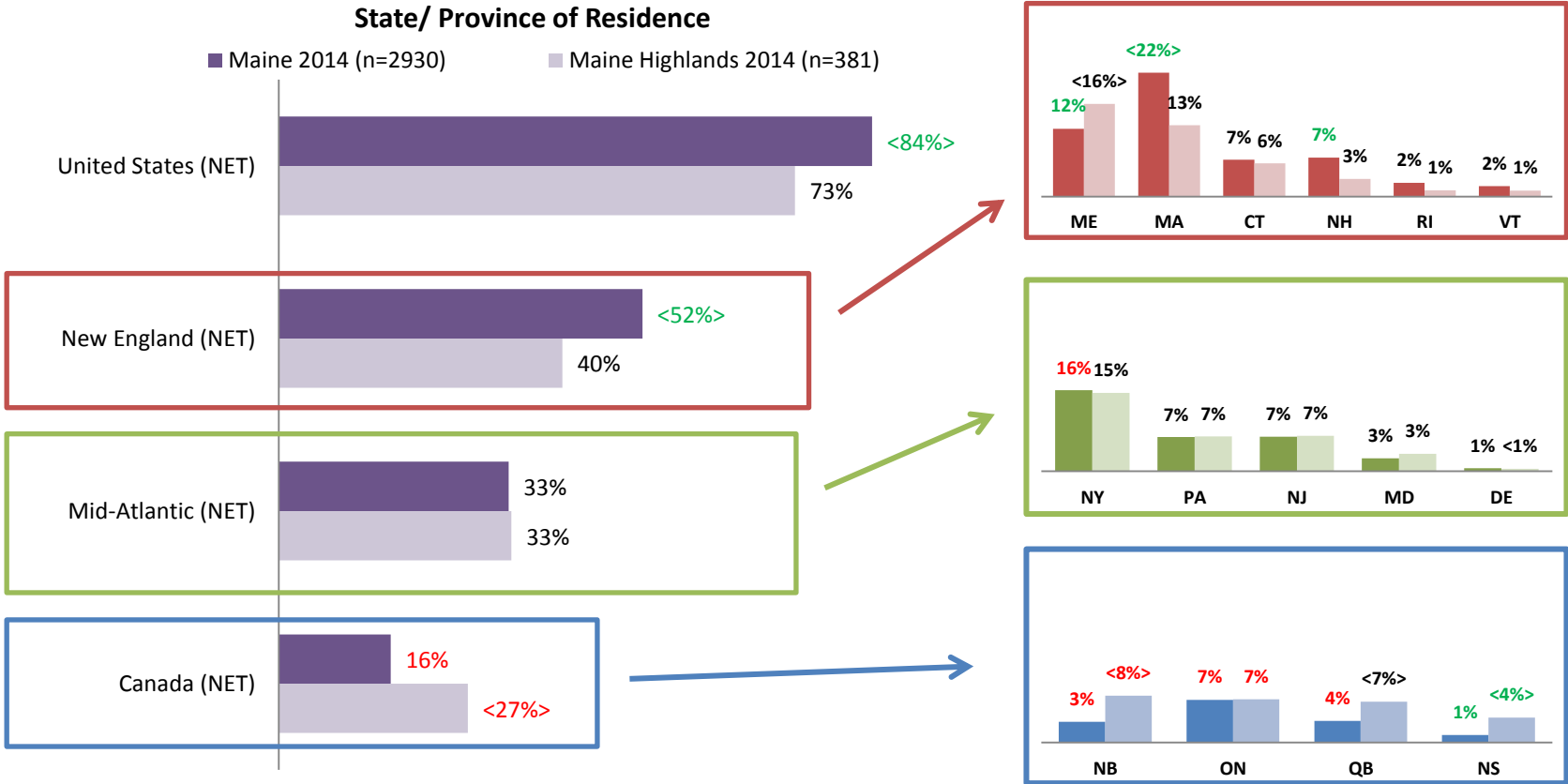
Overnight Visitors	Maine 2014 (n=2930)	Maine Highlands 2014 (n=381)
Age:		
< 35	29%	<39%>
35 - 44	19%	22%
45 - 54	20%	20%
55 +	<32%>	18%
Mean Age (Years)	<45.4>	41.2
Income:		
< \$50,000	16%	18%
\$50,000 - \$99,999	40%	<46%>
\$100,000 +	<44%>	36%
Mean Income (Thousands)	<\$106,260>	\$98,060
Female	54%	53%
College Degree or Higher	74%	72%
Married	66%	61%
Employed Full Time	62%	63%

<> 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.

# Three-fourths of Maine Highlands overnight visitors are from the United States.

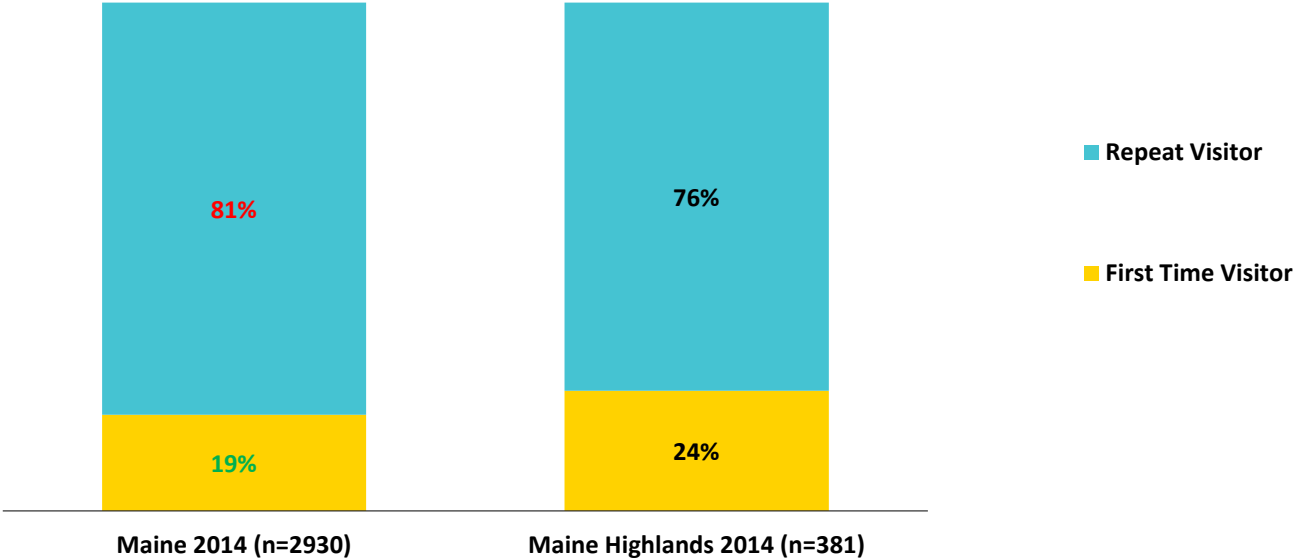
- The Maine Highlands attracts a greater proportion of overnight visitors from Canada than does Maine as a whole, and a lesser proportion from the United States (specifically New England).
- Overnight visitors to the Maine Highlands are more likely than visitors to Maine as a whole to come from Maine, New Brunswick, Quebec, and Nova Scotia, and less likely to come from Massachusetts.





# Three in four overnight visitors to the Maine Highlands is a repeat Maine visitor.

Repeat vs. First Time Visitors

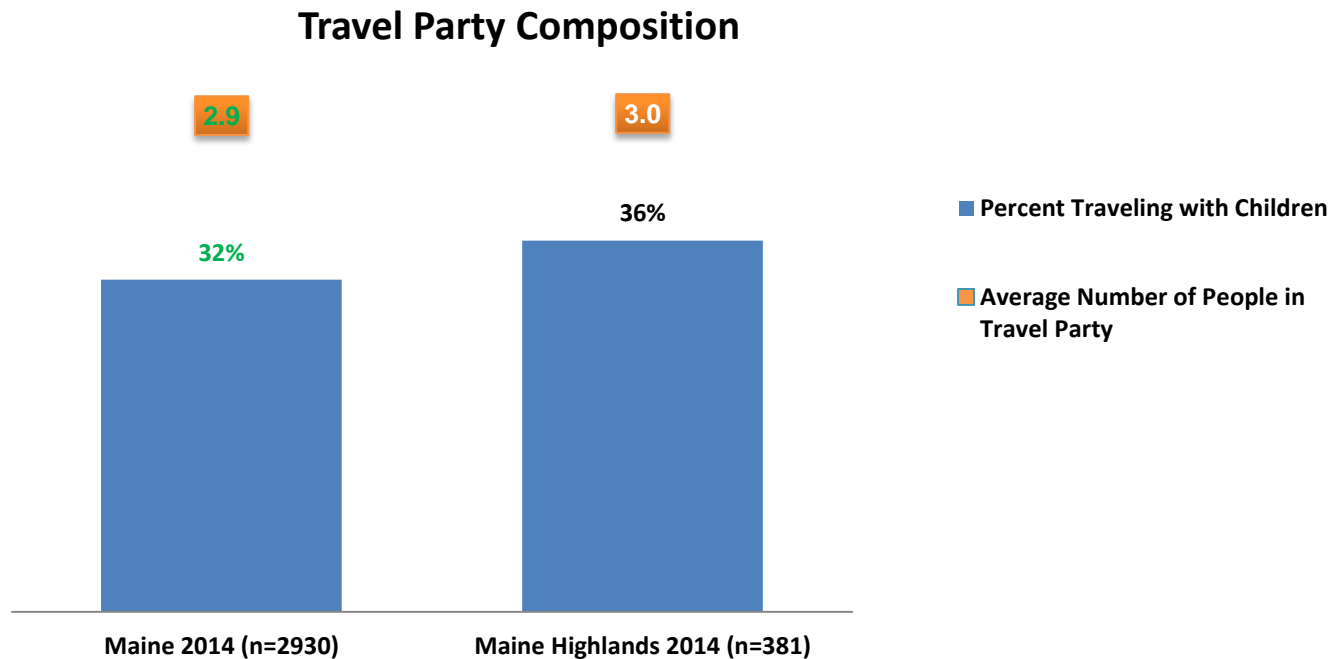


Q11. Was this your first visit in Maine?

Q12. 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.

The average overnight visitor to the Maine Highlands is traveling in a party of three, and one-third are traveling with children.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q19. How many of these people were: Children?

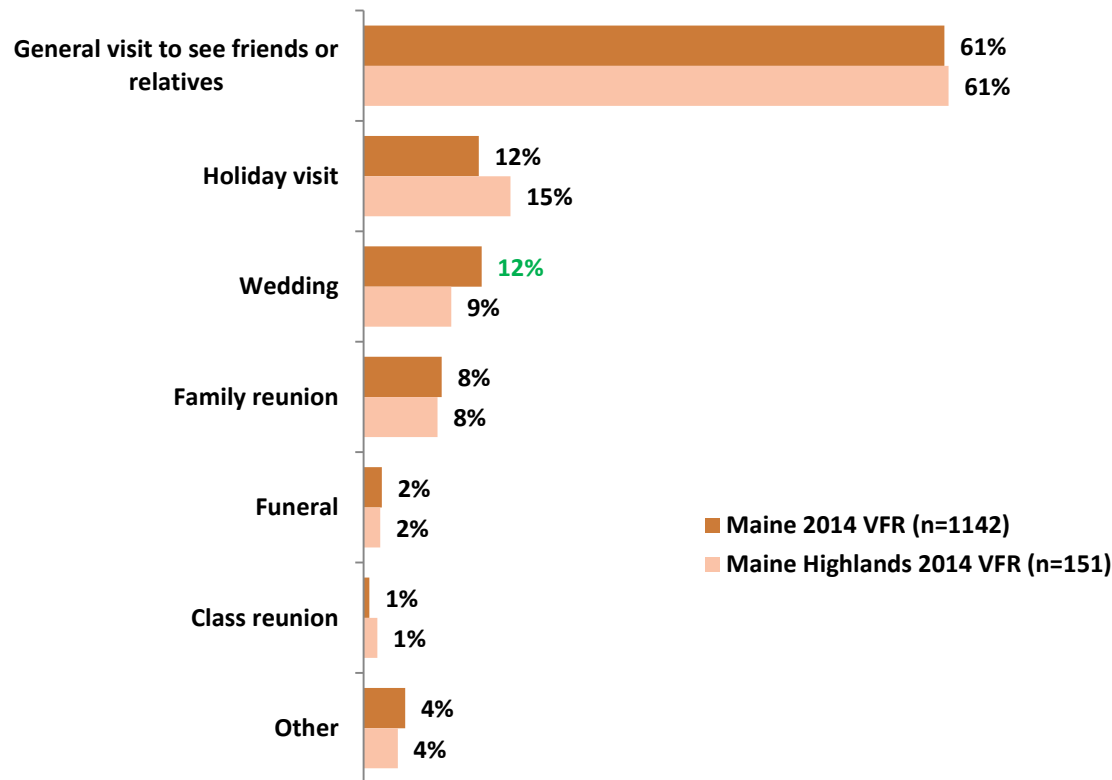
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight Visitors: *Trip Experience*



# Overnight VFR travelers most often cite a *general visit to see friends or relatives* as the primary purpose of their VFR trip.

## Primary Purpose of Overnight VFR Trips



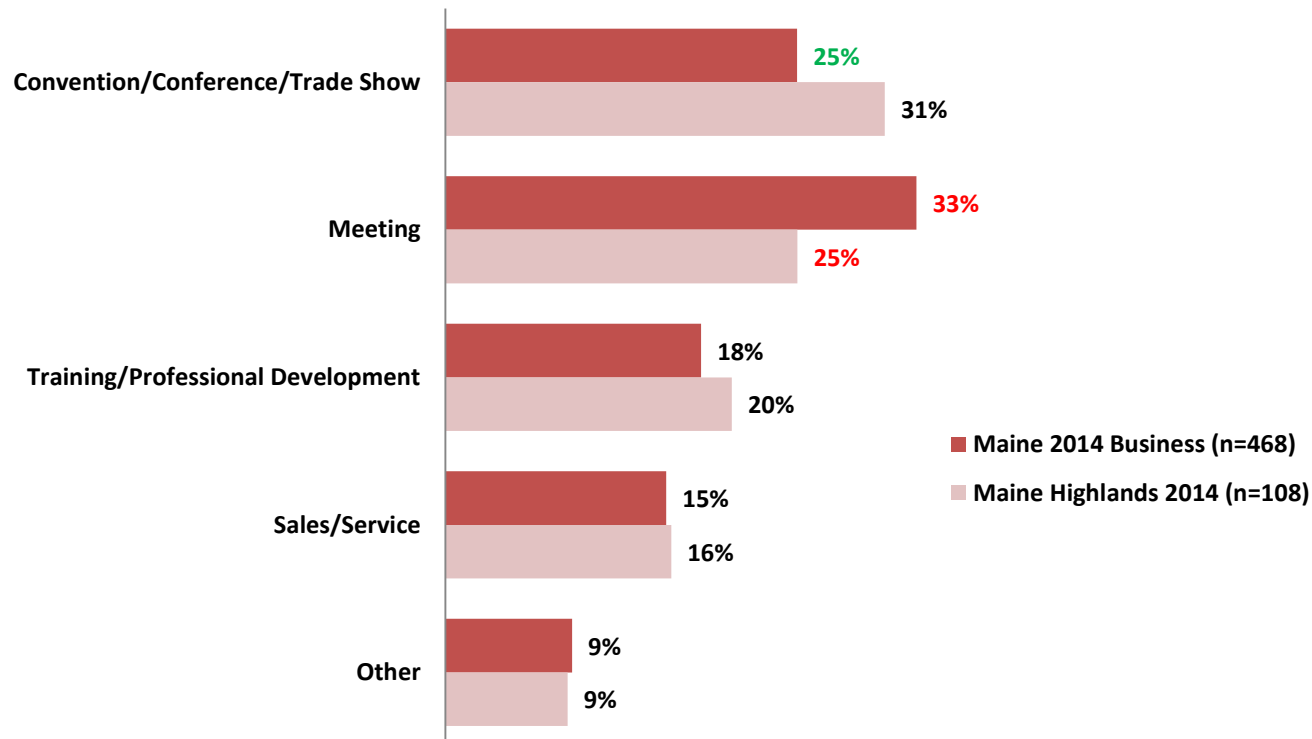
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> 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.

# Conventions/conferences/trade shows and meetings are the top reasons for an overnight business trip to the region.

## Primary Purpose of Overnight Business Trips



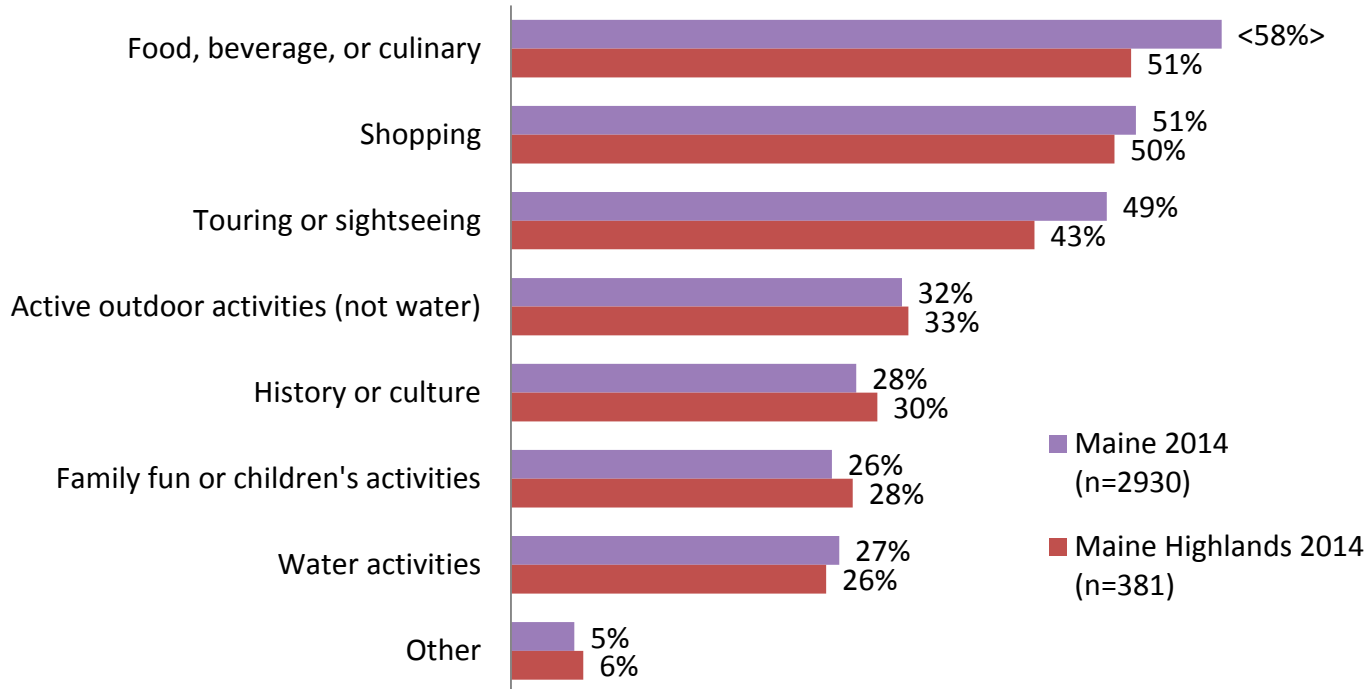
Q8. What was the primary purpose of your most recent business trip in Maine?

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

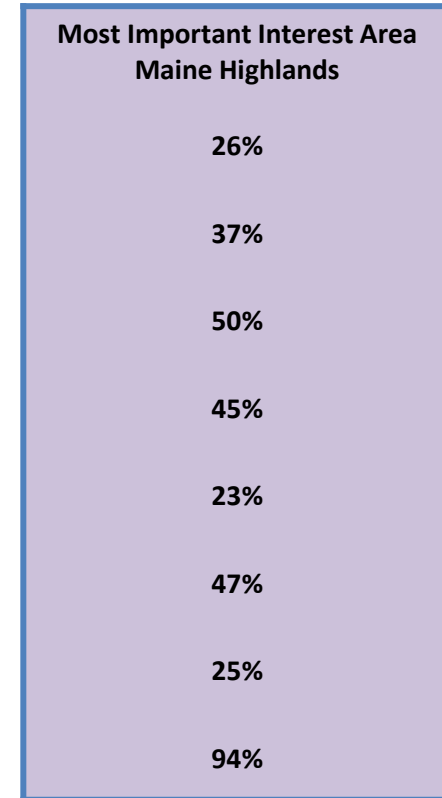
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Food/beverage/culinary activities and shopping are interests of about half of overnight travelers to the Maine Highlands region.

2014 Interest Areas\*



Most Important Interest Area  
Maine Highlands



Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

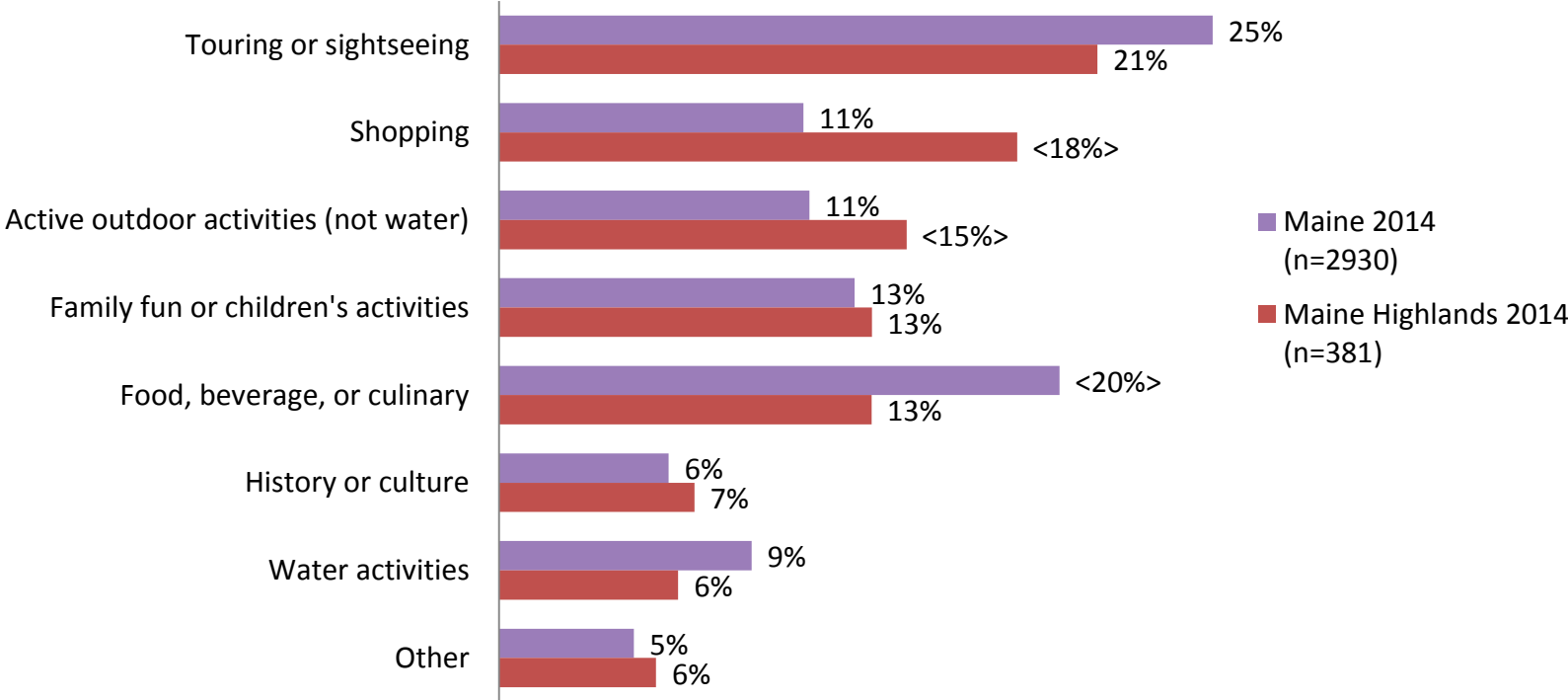
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# When analyzing both interest and importance in deciding to visit, touring or sightseeing and shopping rank highest among overnight visitors to the Maine Highlands region.

- When looking at both interest areas and the relative importance of those interests, overnight visitors to the Maine Highlands region are more likely than visitors to the State as a whole to select *shopping* and *active outdoor* interests, and less likely to select *food/beverage/culinary* interests.

**2014 Interest Areas\***  
**Importance Index**

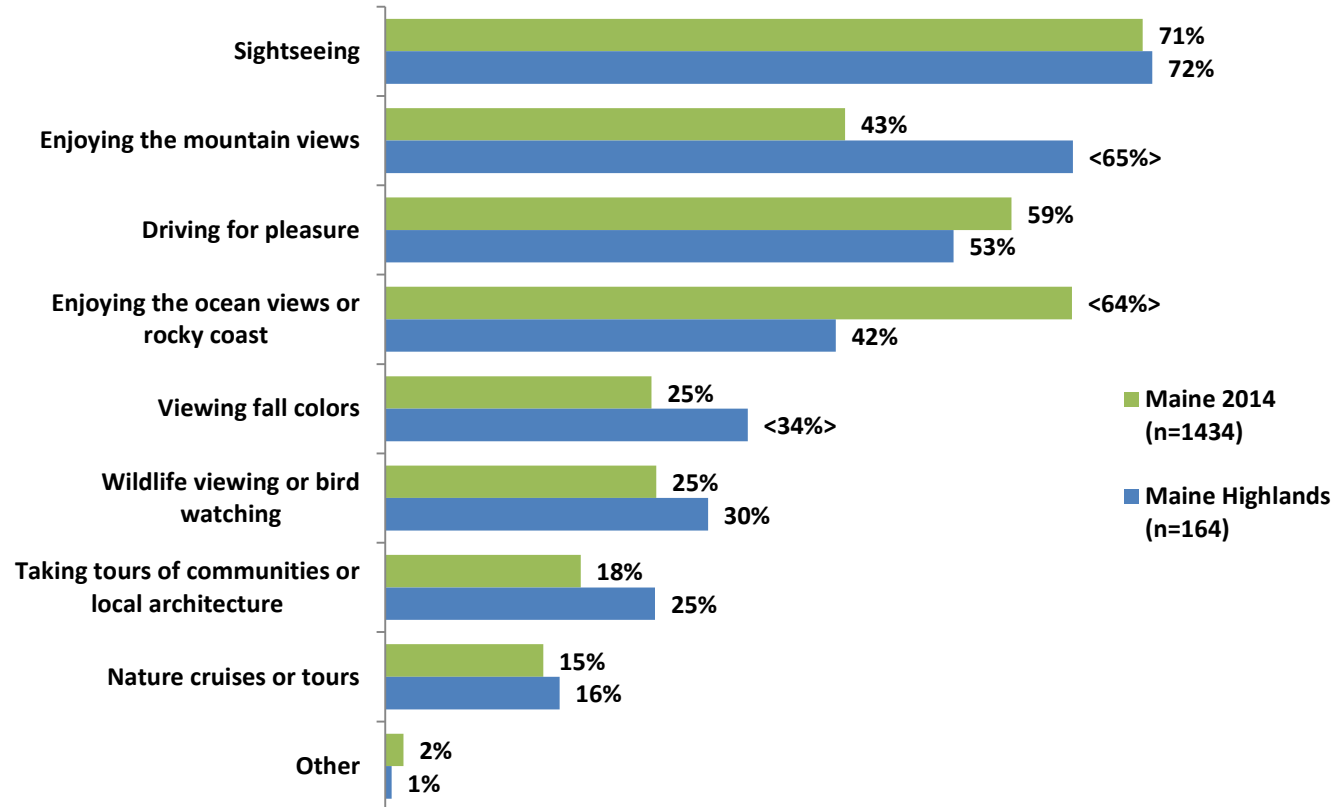


**Importance Index** = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

# Sightseeing is the most common touring or sightseeing activity of overnight visitors to the Maine Highlands, followed by *enjoying the mountain views*.

## Touring or Sightseeing Activities\*

Base: Those who report touring or sightseeing as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

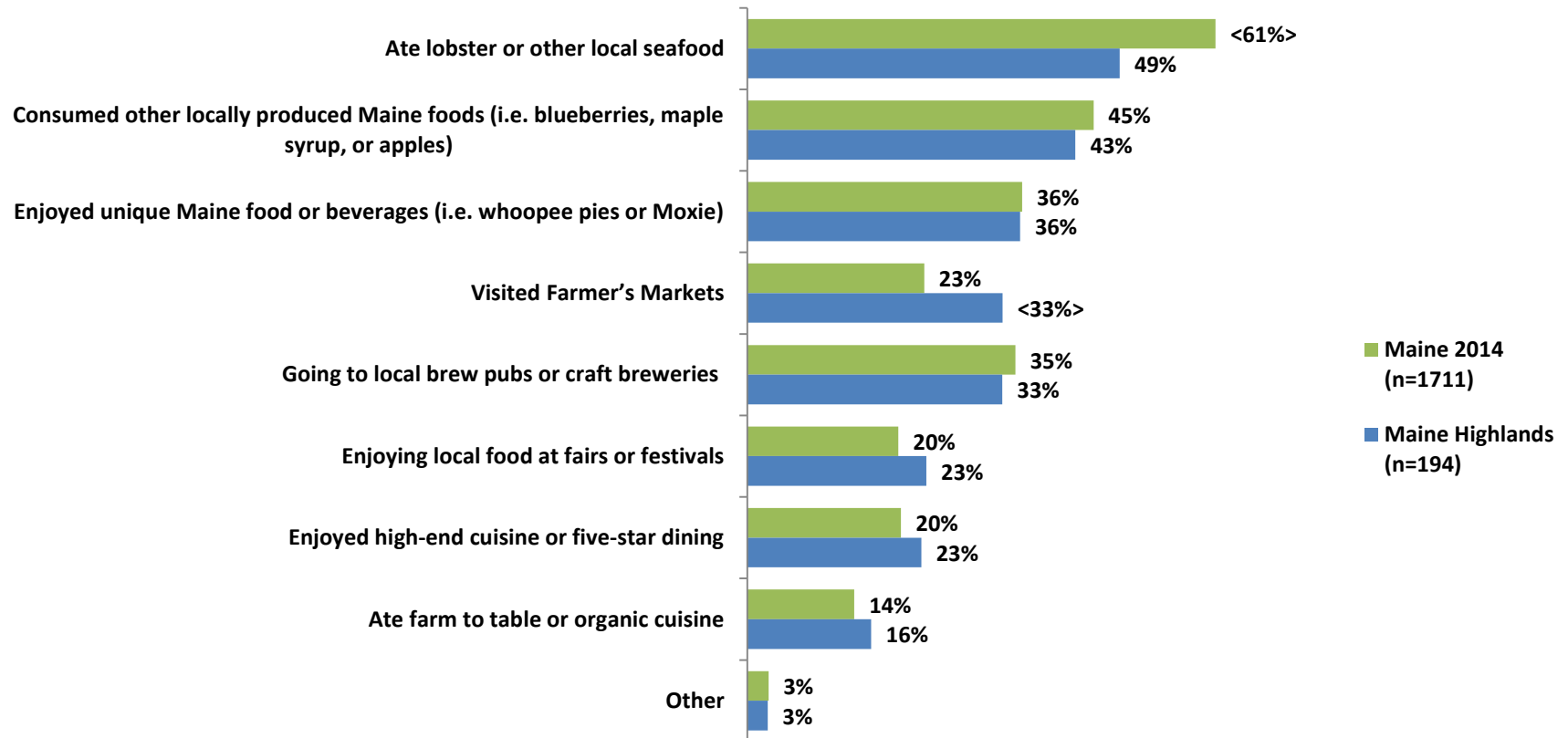
\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.



# The most common food/beverage/culinary activity is *eating lobster or other local seafood*, however fewer do this in the Maine Highlands compared to Maine overall.

## Food, Beverage, or Culinary Activities\*

Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

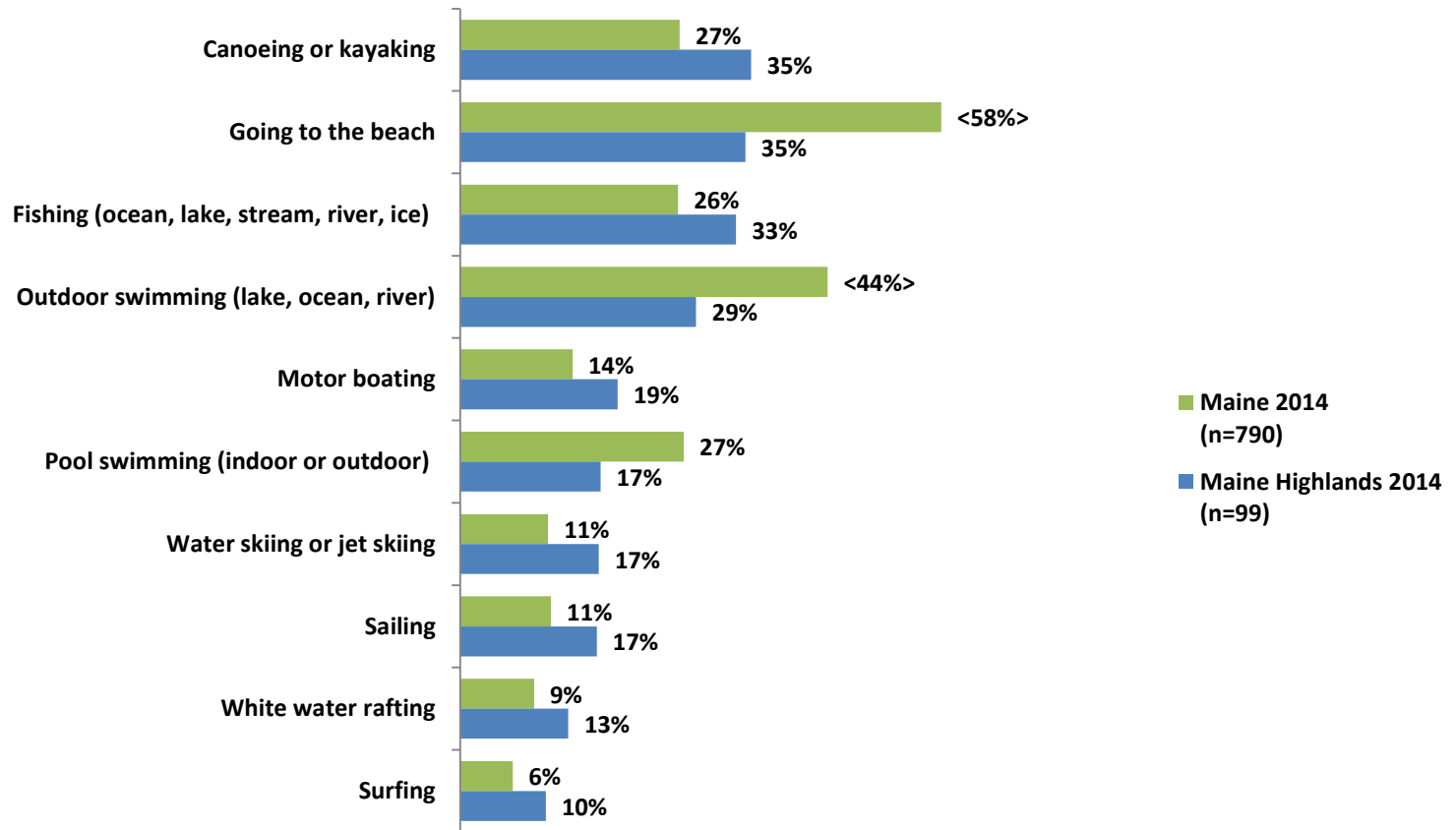
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# The most common water activities among overnight visitors to this region are *canoeing/kayaking, going to the beach, and fishing*, each participated in by about one in three interested in water activities.

## Water Activities\*

Base: Those who report water activities as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

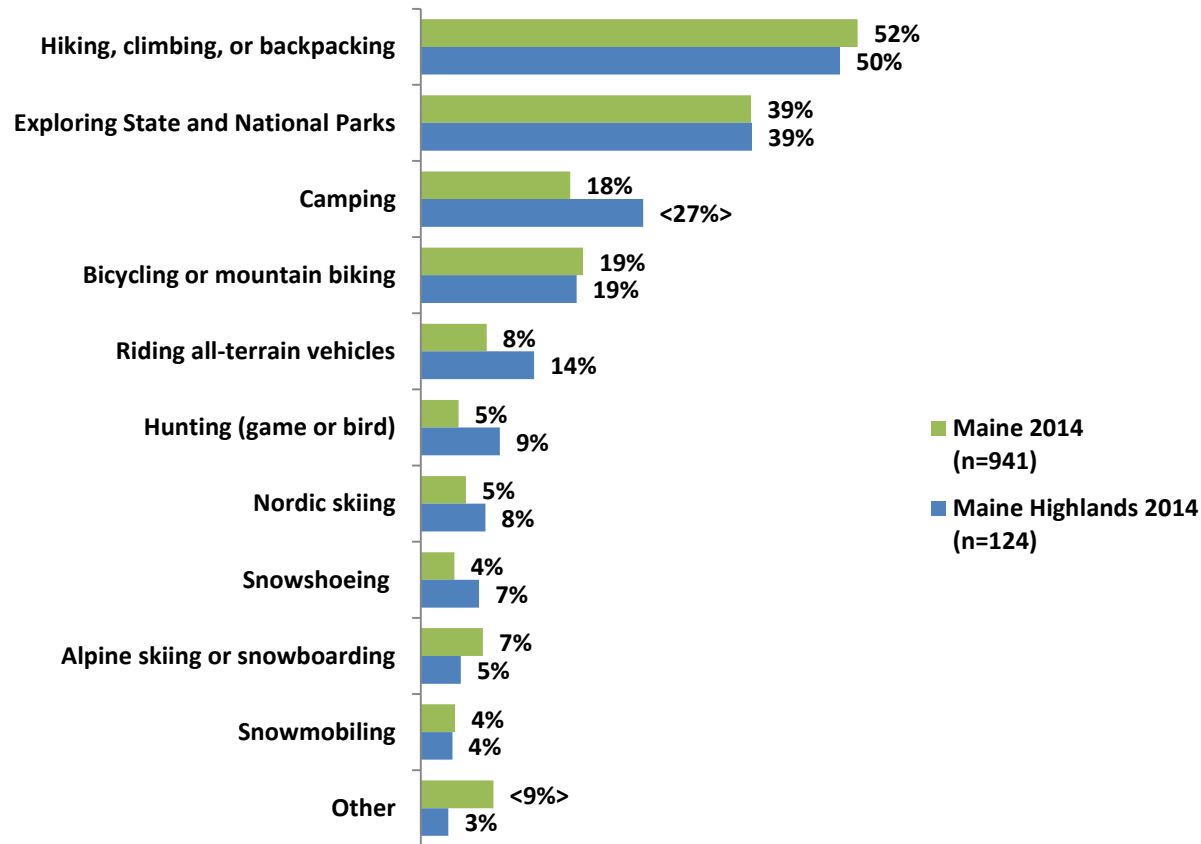
<math>\langle \rangle</math> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# Half of those interested in active outdoor activities do some *hiking, climbing, or backpacking* during their overnight visit to the region.

## Active Outdoor Activities – Non-Water\*

Base: Those who report outdoor activities as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

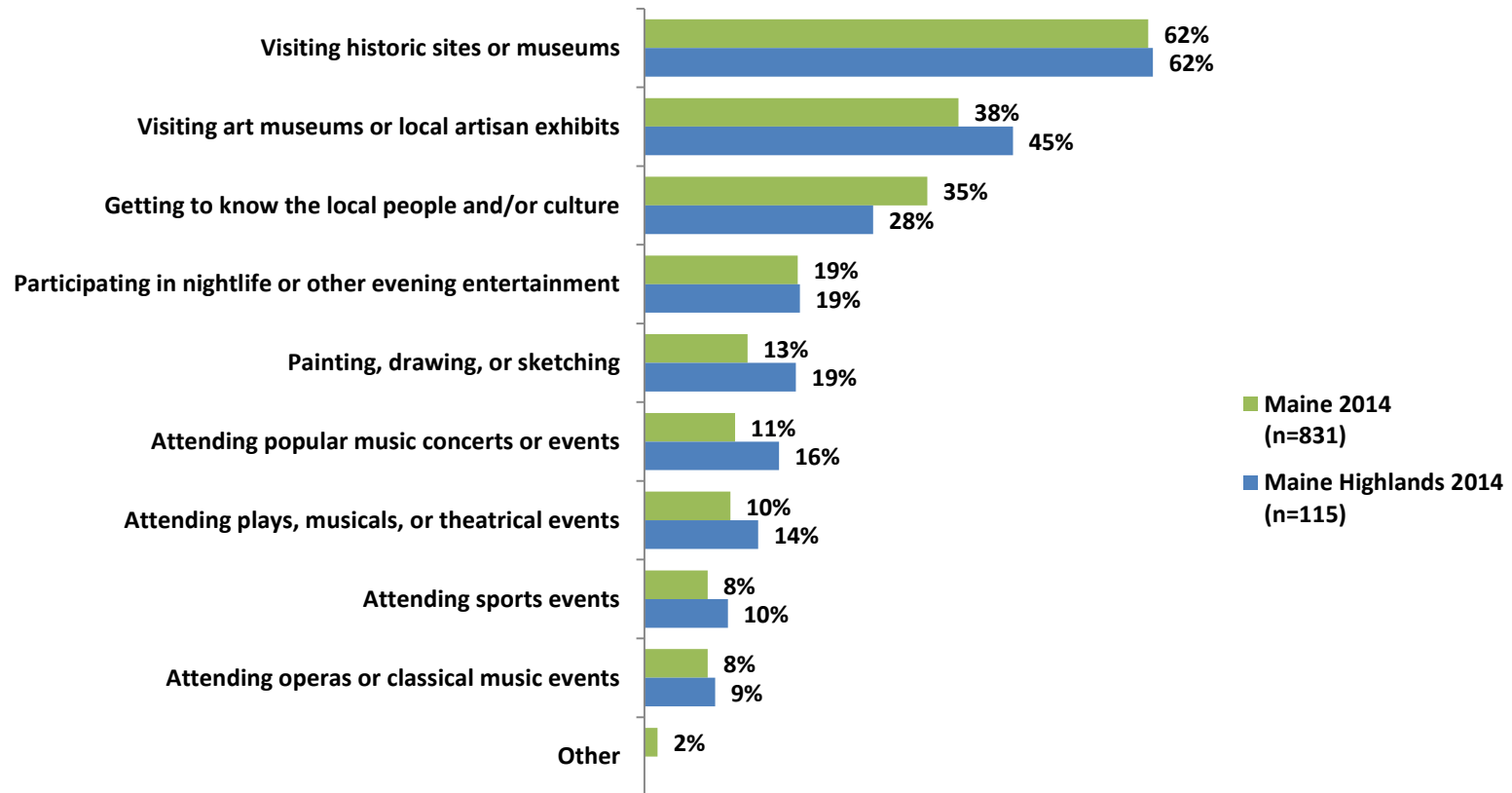
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# Maine Highlands visitors interested in history or culture activities are most likely to visit historic sites or museums.

## History or Culture Activities\*

Base: Those who report history or culture as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

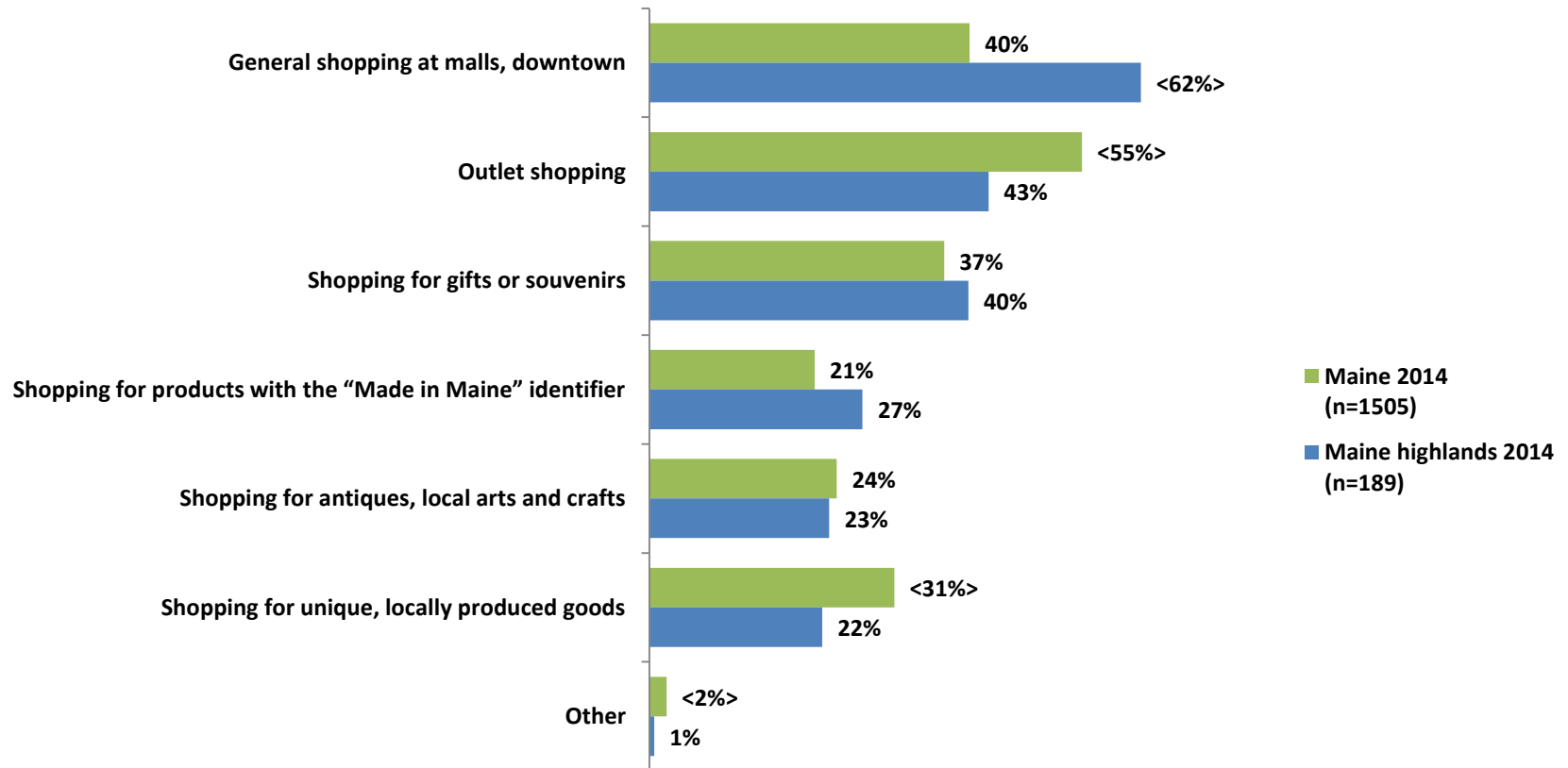
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# General shopping at malls or downtown is the most common shopping activity participated in by overnight visitors to the region.

## Shopping Activities\*

Base: Those who report shopping as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

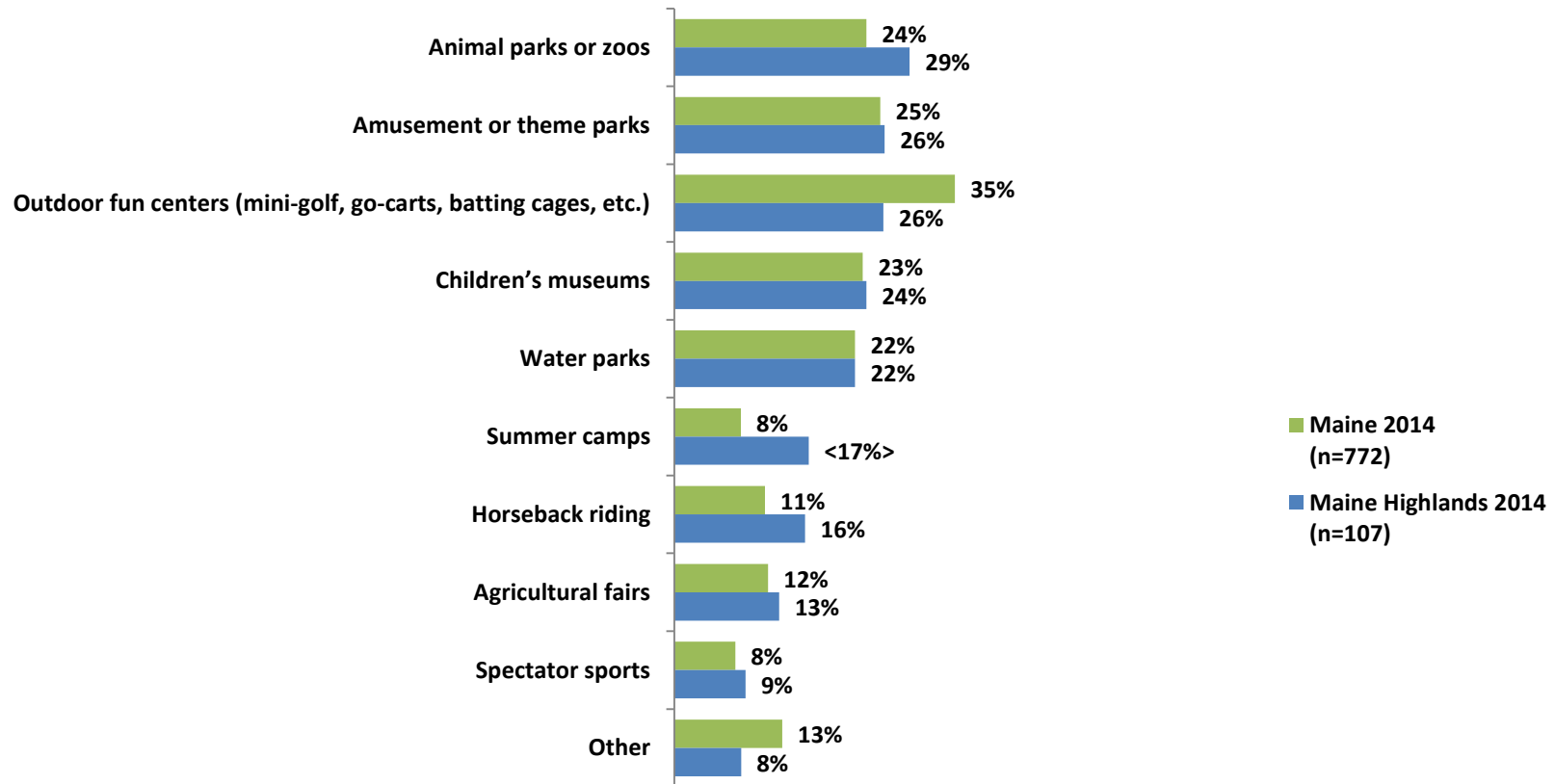
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# The family fun/children’s activities overnight visitors participate in are varied, with more attending *summer camps* in the Maine Highlands than in Maine overall.

## Family Fun/Children’s Activities\*

Base: Those who report family fun/children’s activities as an interest area for this Maine trip

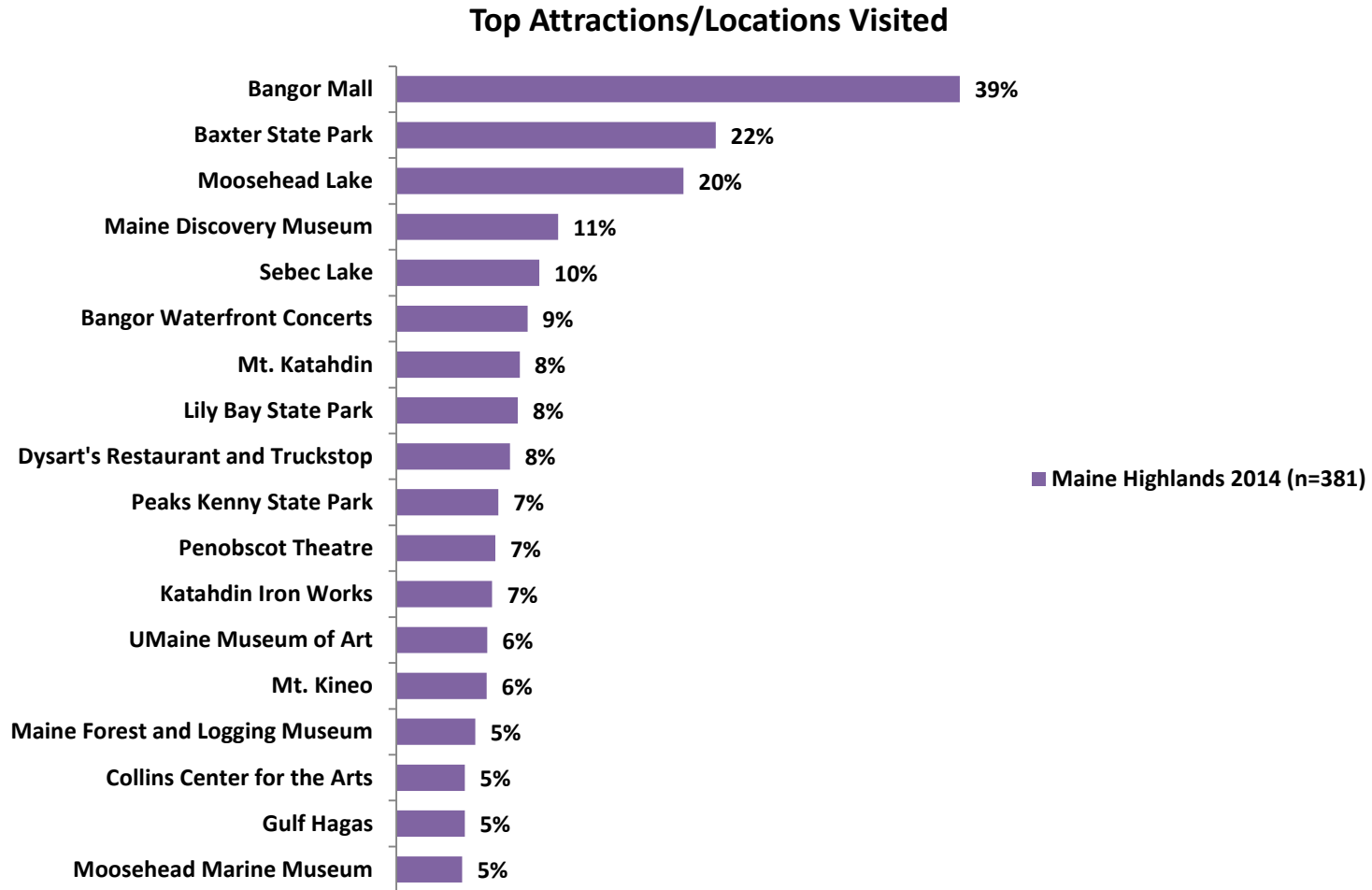


Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

# Two in five overnight visitors to the Maine Highlands visit the Bangor Mall while in the region, representing the top attraction.

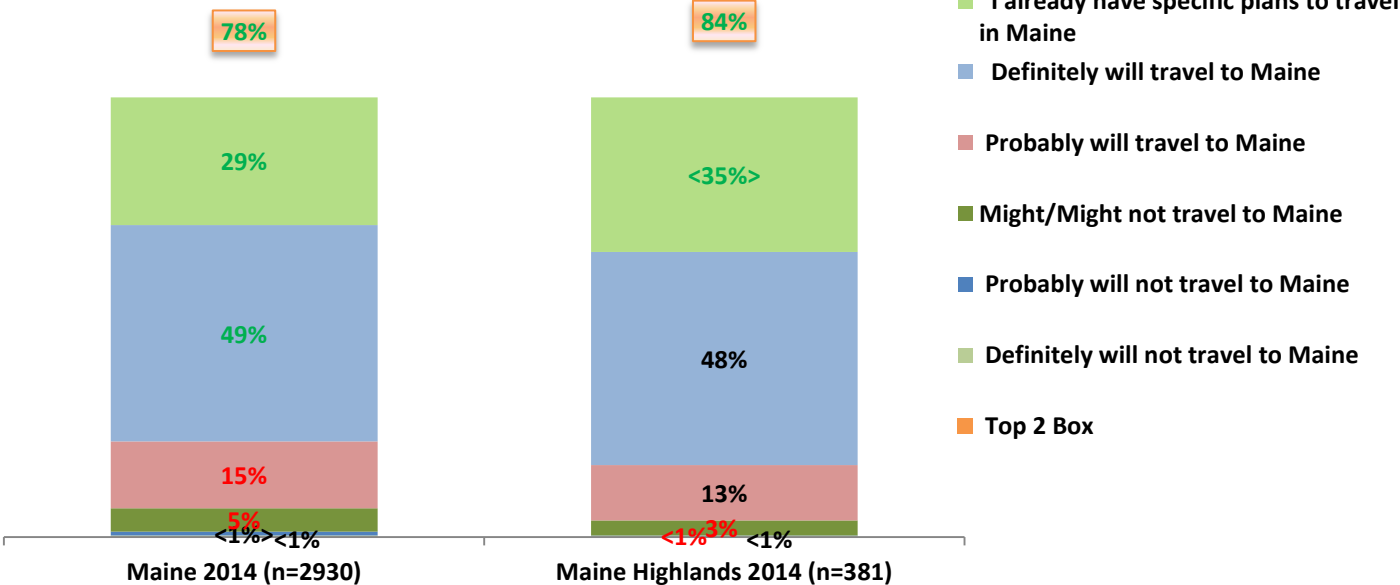


Q26: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

# A strong majority of overnight visitors to the Maine Highlands plan to return to Maine.

- A higher proportion of overnight visitors to the Maine Highlands region indicate that they *already have specific plans to travel in Maine* in the next two years, as compared to overnight visitors to Maine as a whole.

## Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?  
 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 average around 45 years of age, earning just under \$80,000 annually. Three in five have a college degree, and 57% are employed full-time.
- Similar to overnight visitors, day visitors to the Maine Highlands tourism region have lower annual household incomes on average and are younger than Maine visitors overall. They are also less likely to have a college degree than day visitors to the State as a whole.

Day Visitors	Maine 2014 (n=1733)	Maine Highlands 2014 (n=144)
Age:		
< 35	24%	29%
35 - 44	16%	22%
45 - 54	22%	24%
55 +	<38%>	26%
Mean Age (Years)	<47.9>	44.8
Income:		
< \$50,000	22%	<31%>
\$50,000 - \$99,999	43%	41%
\$100,000 +	<36%>	27%
Mean Income (Thousands)	<\$93,610>	\$79,440
Female	56%	62%
College Degree or Higher	<69%>	59%
Married	64%	57%
Employed Full Time	54%	57%

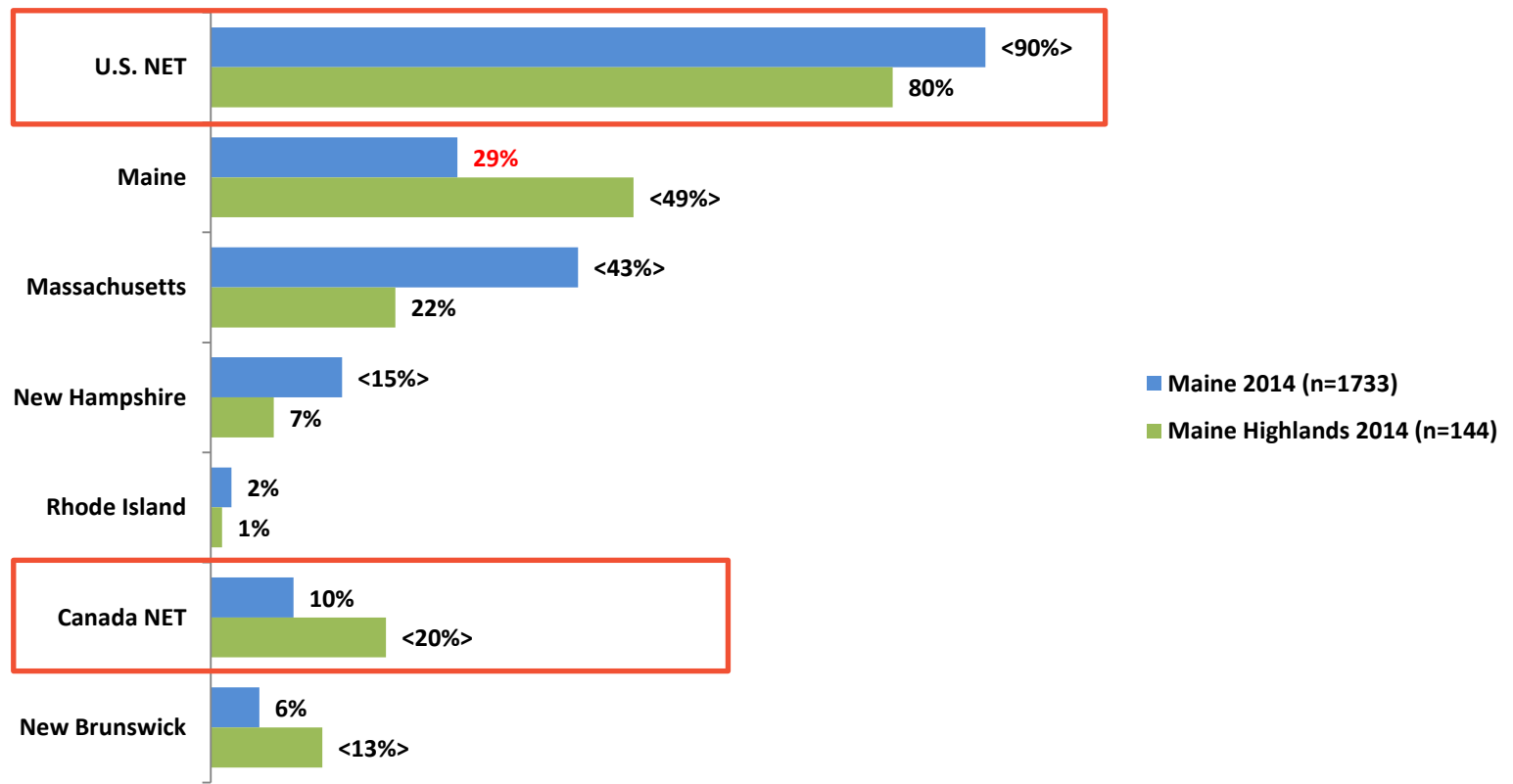
<> indicates a significant difference between subgroups at the 95% confidence level.

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

# Four in five day visitors to the Maine Highlands arrive from the US, while one in five come from Canada.

- When compared with the State of Maine as a whole, day visitors to the Maine Highlands are more likely to be from Canada and less likely to be from the US.
- Specifically, a greater proportion arrive in the Maine Highlands from Maine and New Brunswick, while a lesser proportion arrive from Massachusetts and New Hampshire.

State/ Province of Residence

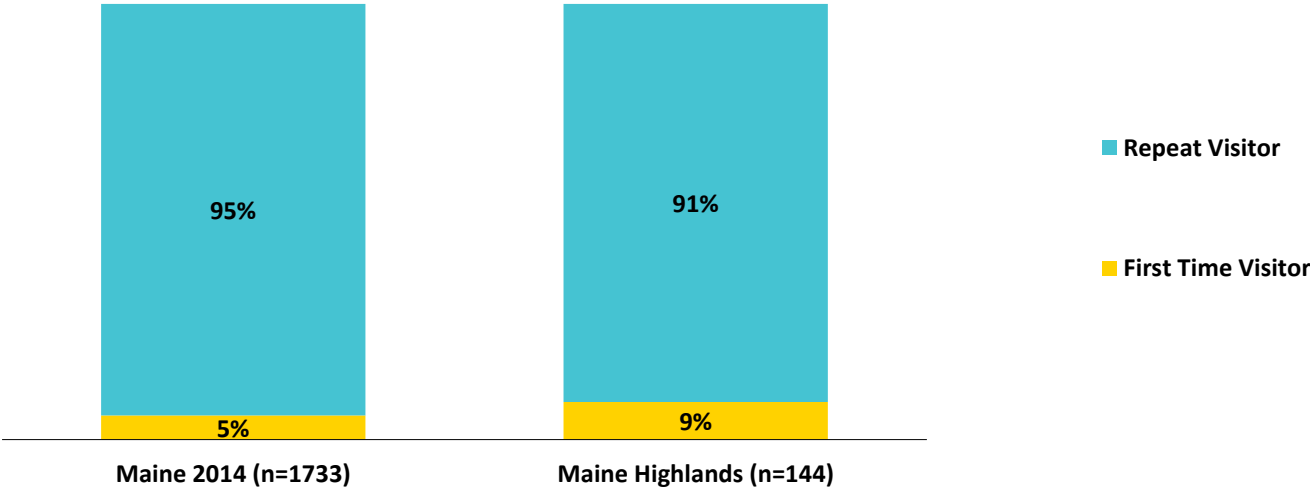


Q2. In what State or Province do you reside?

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 have previously visited Maine.

## Repeat vs. First Time Visitors

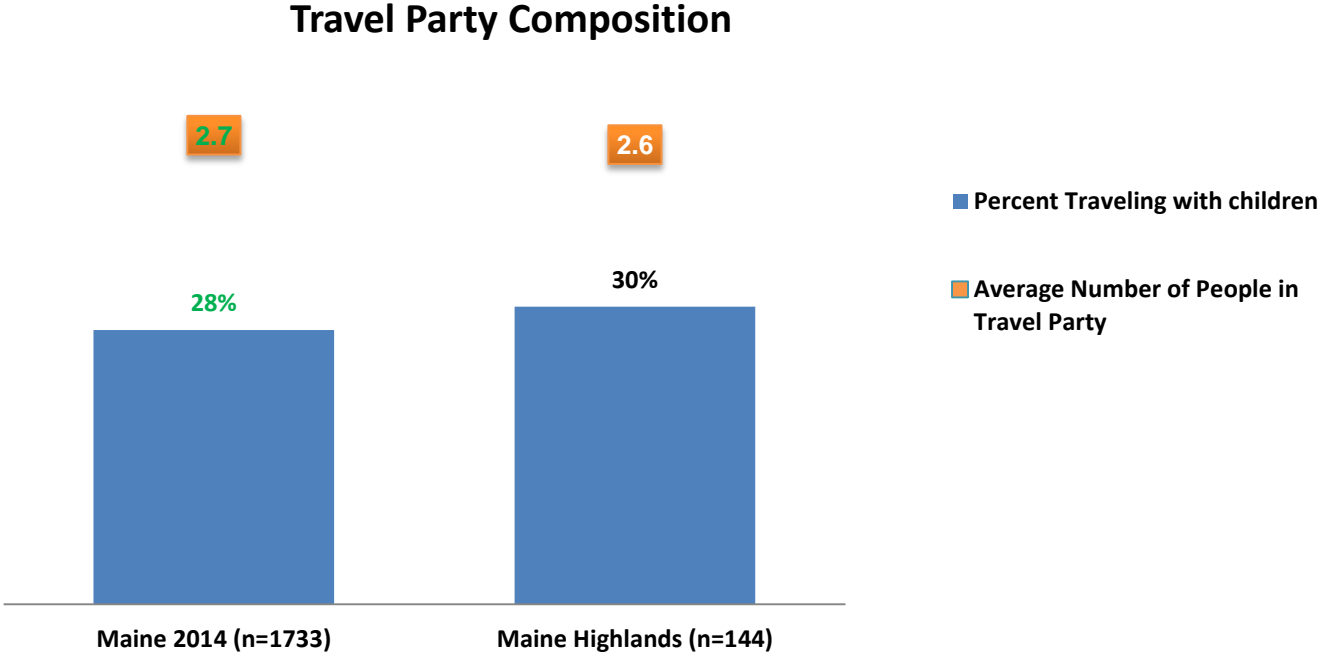


Q10. Was this your first trip to Maine?

Q11. 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.

On average, day visitors to the Maine Highlands region travel in parties of two or three people, and nearly one-third are traveling with children.



Q14. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q15. How many of these people were: Children

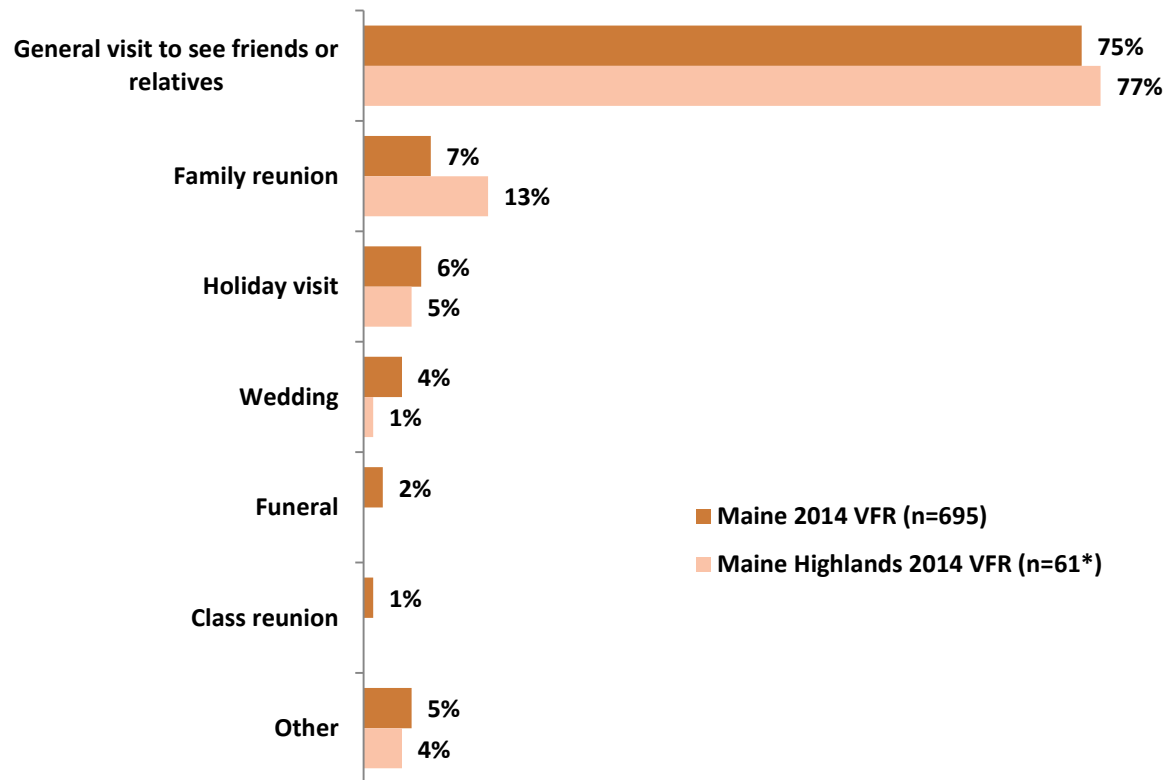
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day Visitors: *Trip Experience*



# Three in four VFR day visitors cite a *general visit to see friends or relatives* as the primary purpose of their trip.

## Primary Purpose of Day VFR Trips



Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

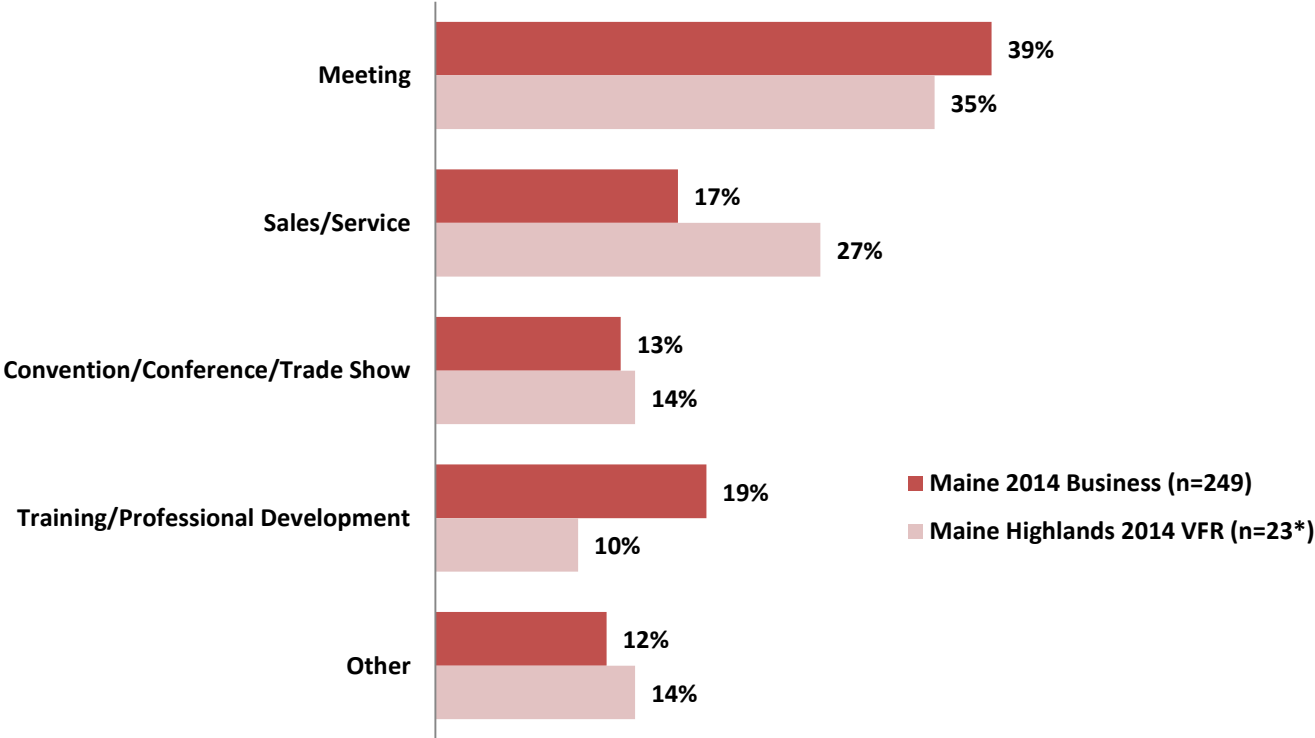
<> indicates a significant difference between subgroups at the 95% confidence level.

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

*\*Please note small sample size.*

# One in three business day visitors' primary trip purpose is to attend a *meeting* in the Maine Highlands region.

### Primary Purpose of Day Business Trips



Q8. What was the primary purpose of your most recent business trip in Maine?

<> 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.

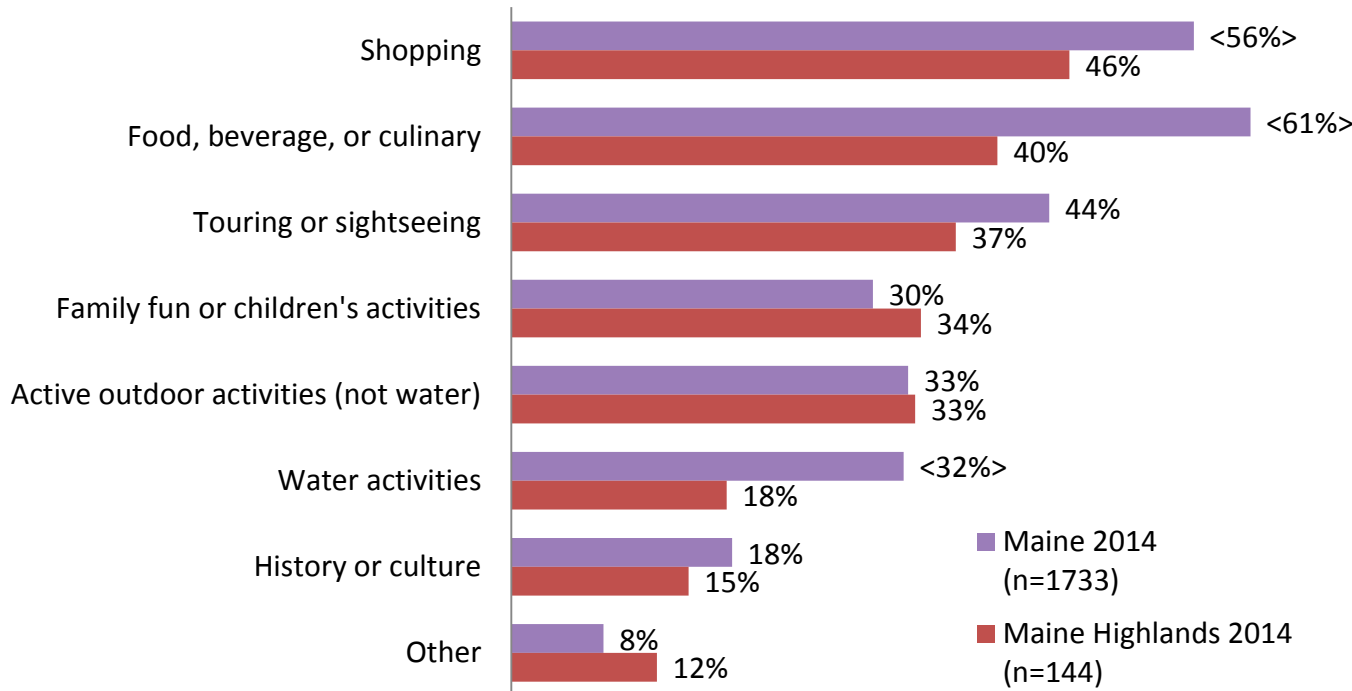
*\*Please note very small sample size.*



# Shopping and food/beverage/culinary activities are the most common interest areas pursued by day visitors to the Maine Highlands.

- Day visitors to the Maine Highlands region are less likely than day visitors to the State of Maine as a whole to be interested in *shopping, food/beverage/culinary, and water activities*.

2014 Interest Areas\*



Most Important Interest Area Maine Highlands	
Shopping	42%
Food, beverage, or culinary	20%
Touring or sightseeing	51%
Family fun or children's activities	55%
Active outdoor activities (not water)	51%
Water activities	33%
History or culture	21%
Other	79%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

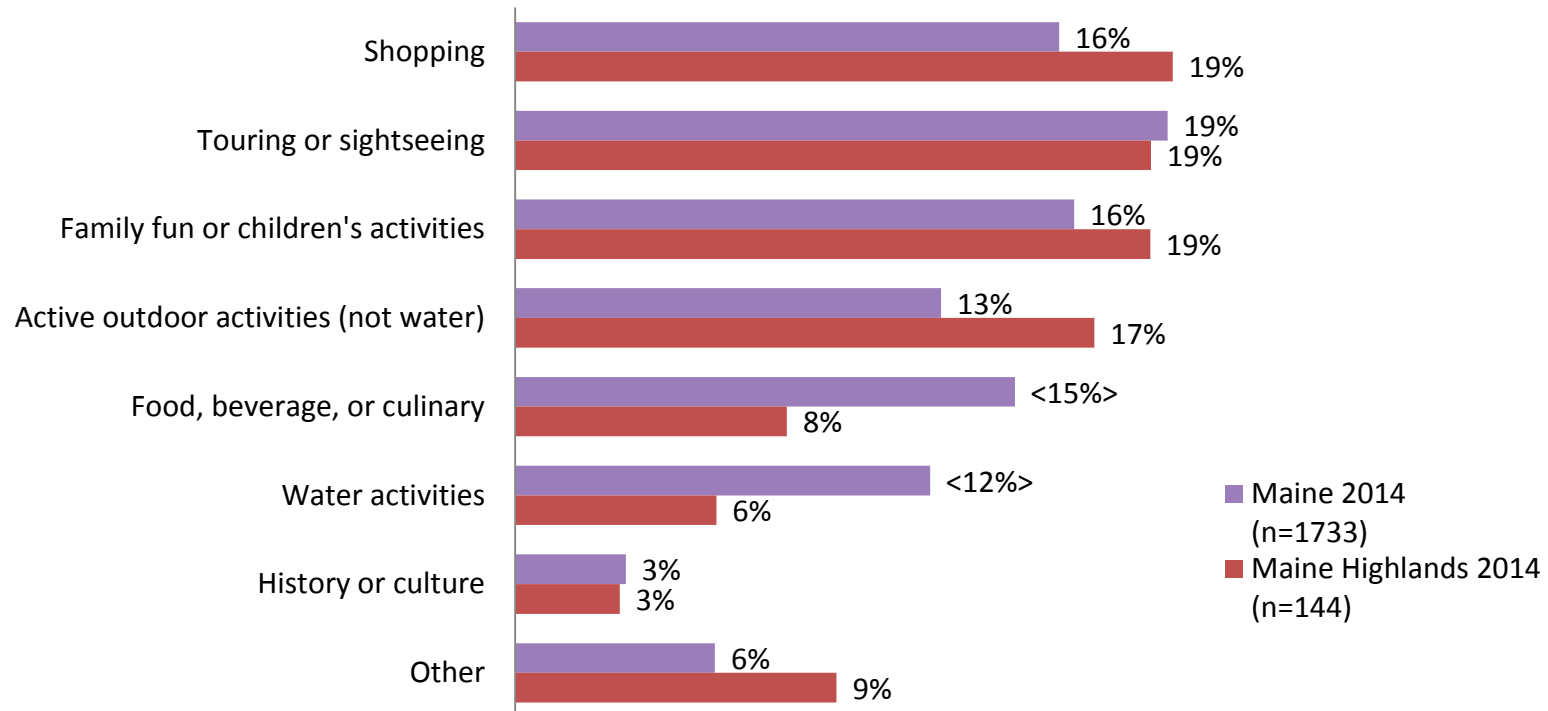
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

## Touring/sightseeing, family fun/children's activities, and shopping rank equally high when analyzing both interest and importance.

- Day visitors to the Maine Highlands region are less likely than day visitors to the State of Maine as a whole to rank *food/beverage/culinary activities* and *water activities* highly when analyzing both interest and importance.

**2014 Interest Areas\***  
**Importance Index**



**Importance Index** = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34

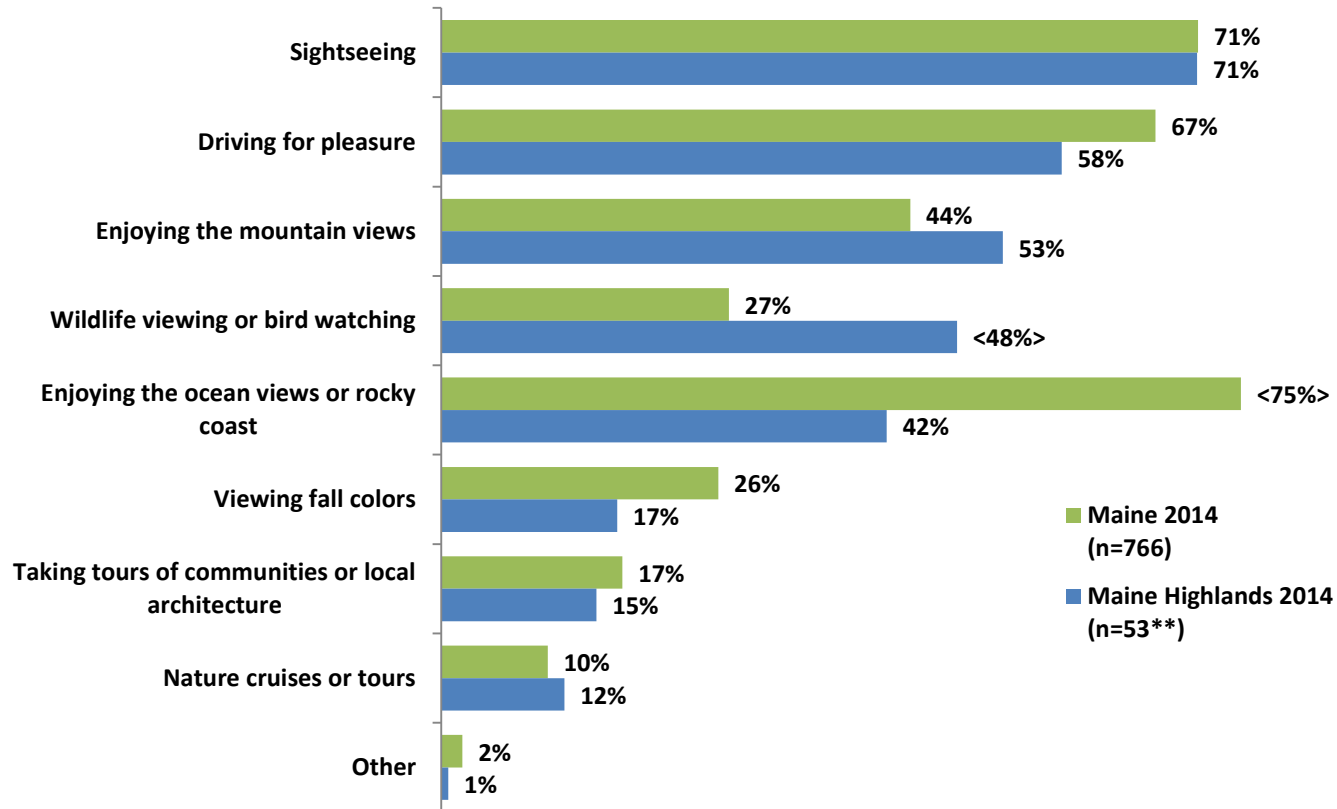
<> indicates a significant difference between subgroups at the 95% confidence level.

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years

# Sightseeing is the most common touring or sightseeing activity participated in by day visitors to the Maine Highlands.

## Touring or Sightseeing Activities\*

Base: Those who report touring or sightseeing as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

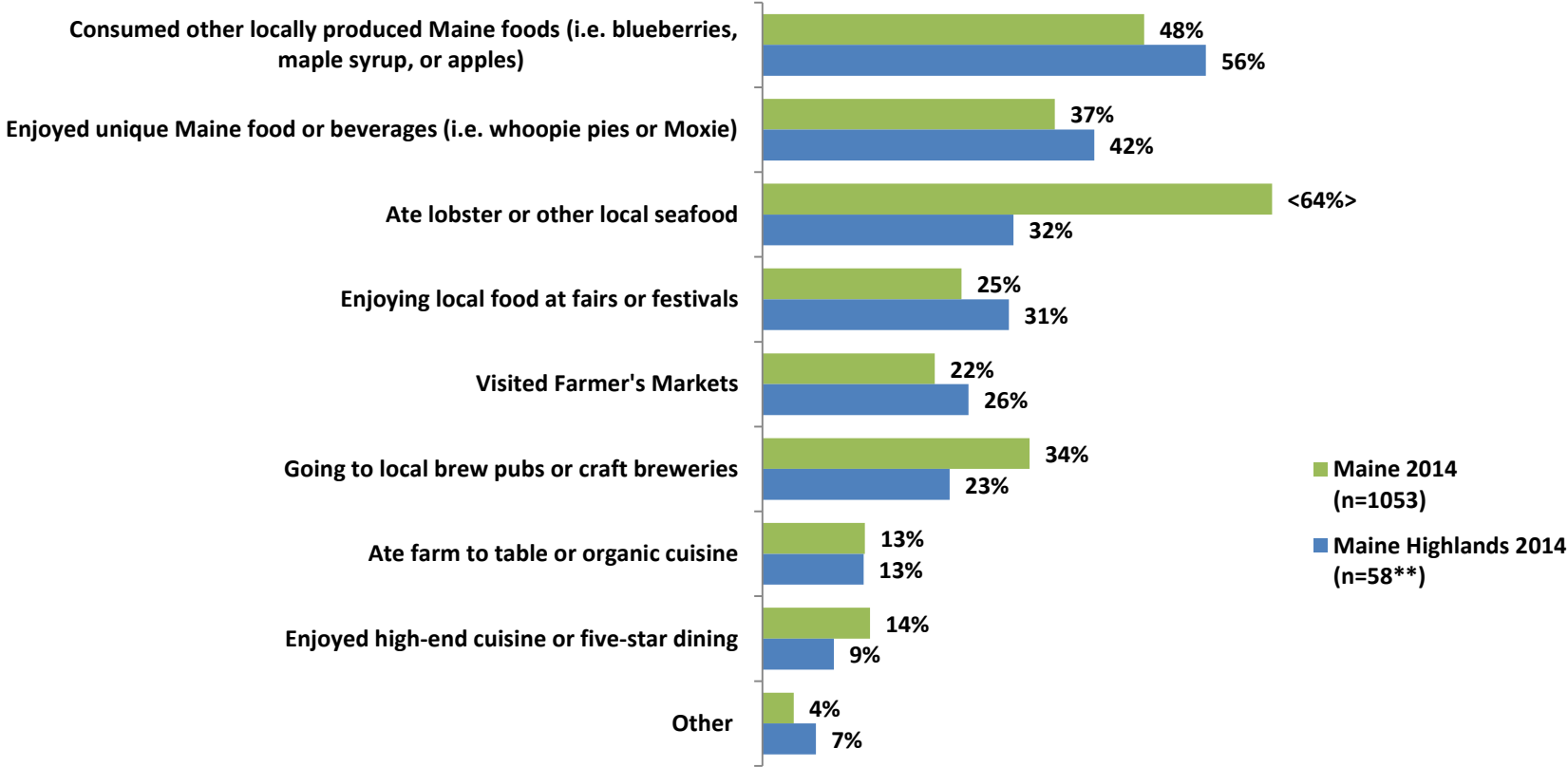
\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

\*\*Please note small sample size.

# The majority of participants with food/beverage/culinary interests consume locally produced Maine foods while visiting the region.

## Food, Beverage, or Culinary Activities\*

Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

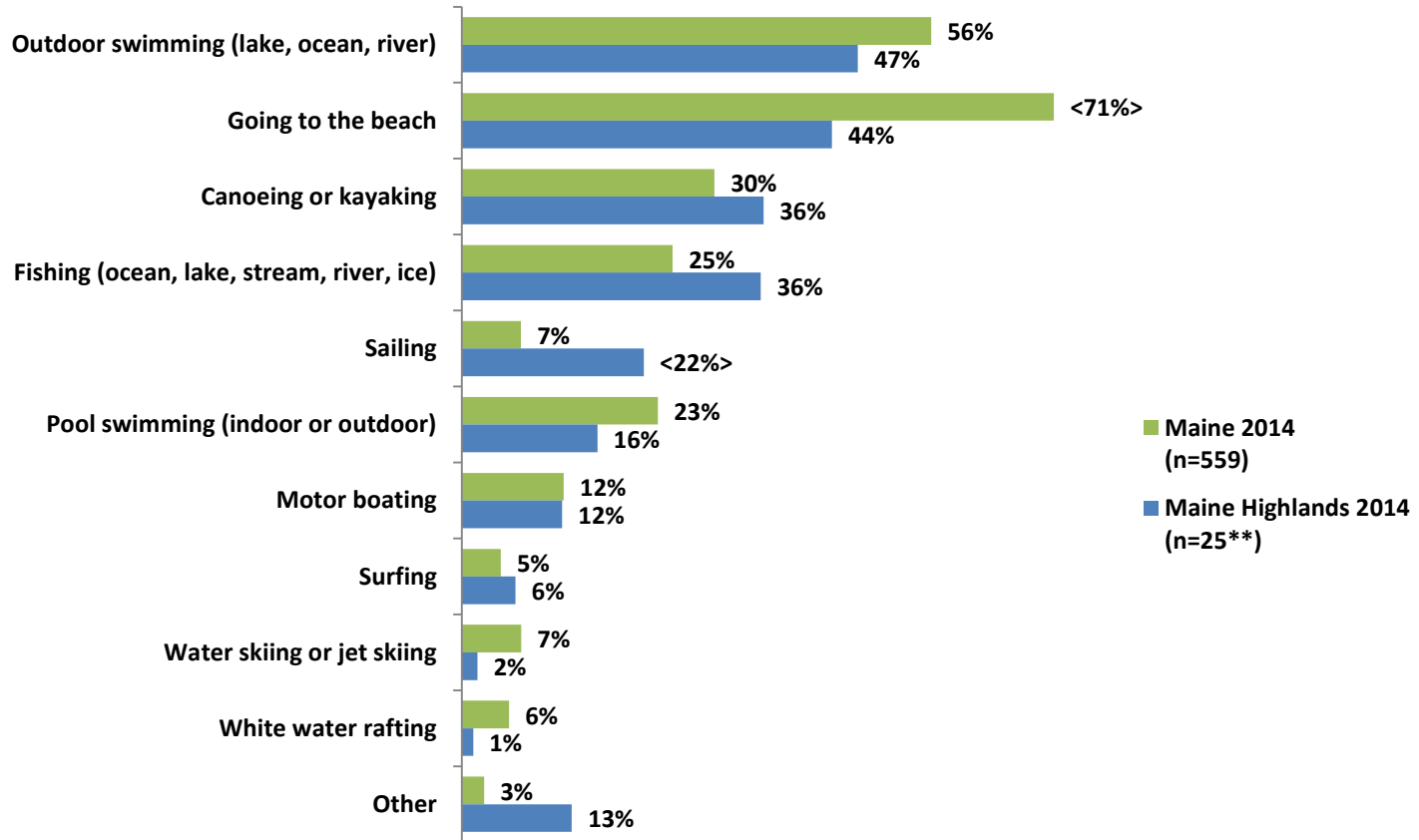
\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

\*\*Please note small sample size.

# Outdoor swimming and going to the beach are the most common pursuits among day visitors to the region who are interested in water activities.

## Water Activities\*

Base: Those who report water activities as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

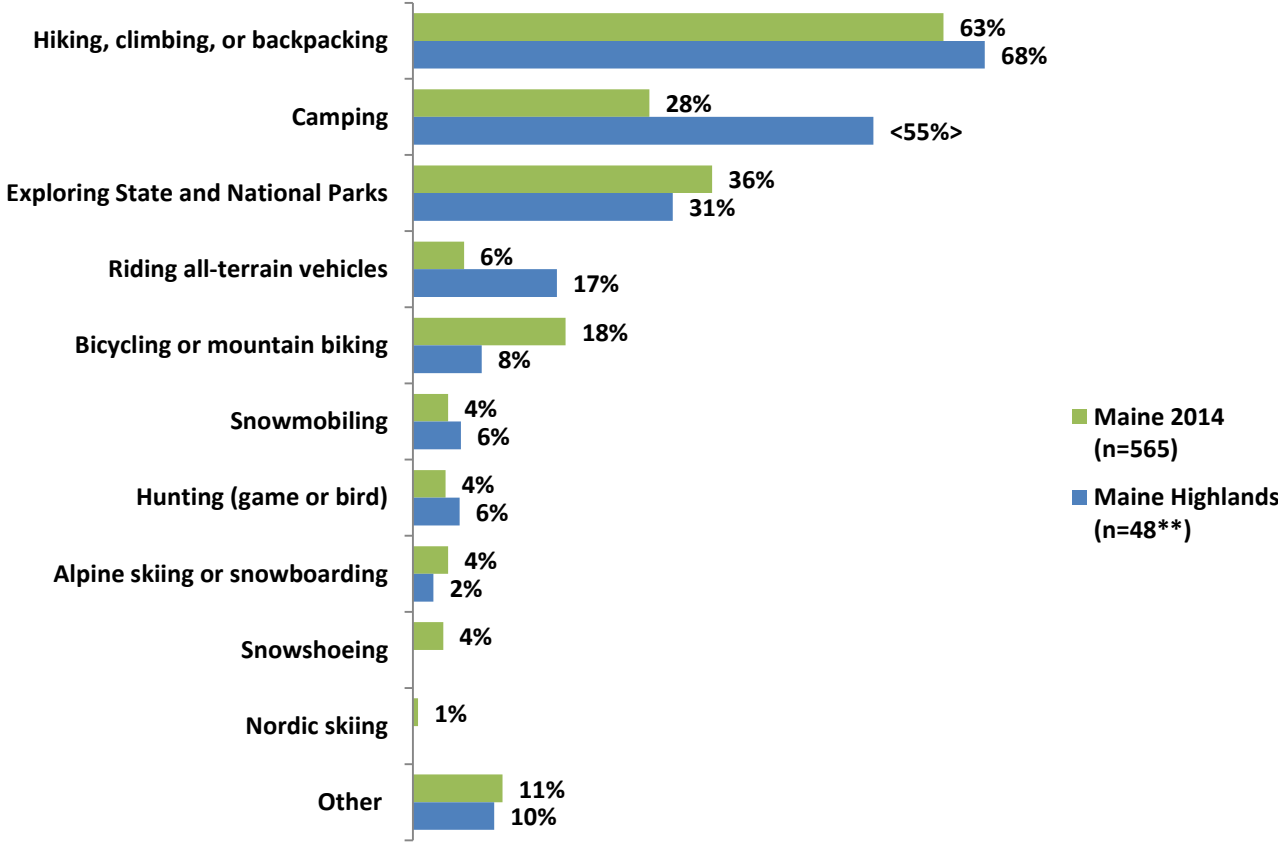
\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

\*\*Please note small sample size.

# Two-thirds of Maine Highlands day visitors interested in active outdoor activities did some *hiking/climbing/backpacking*.

## Active Outdoor Activities – Non-Water\*

Base: Those who report outdoor activities as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

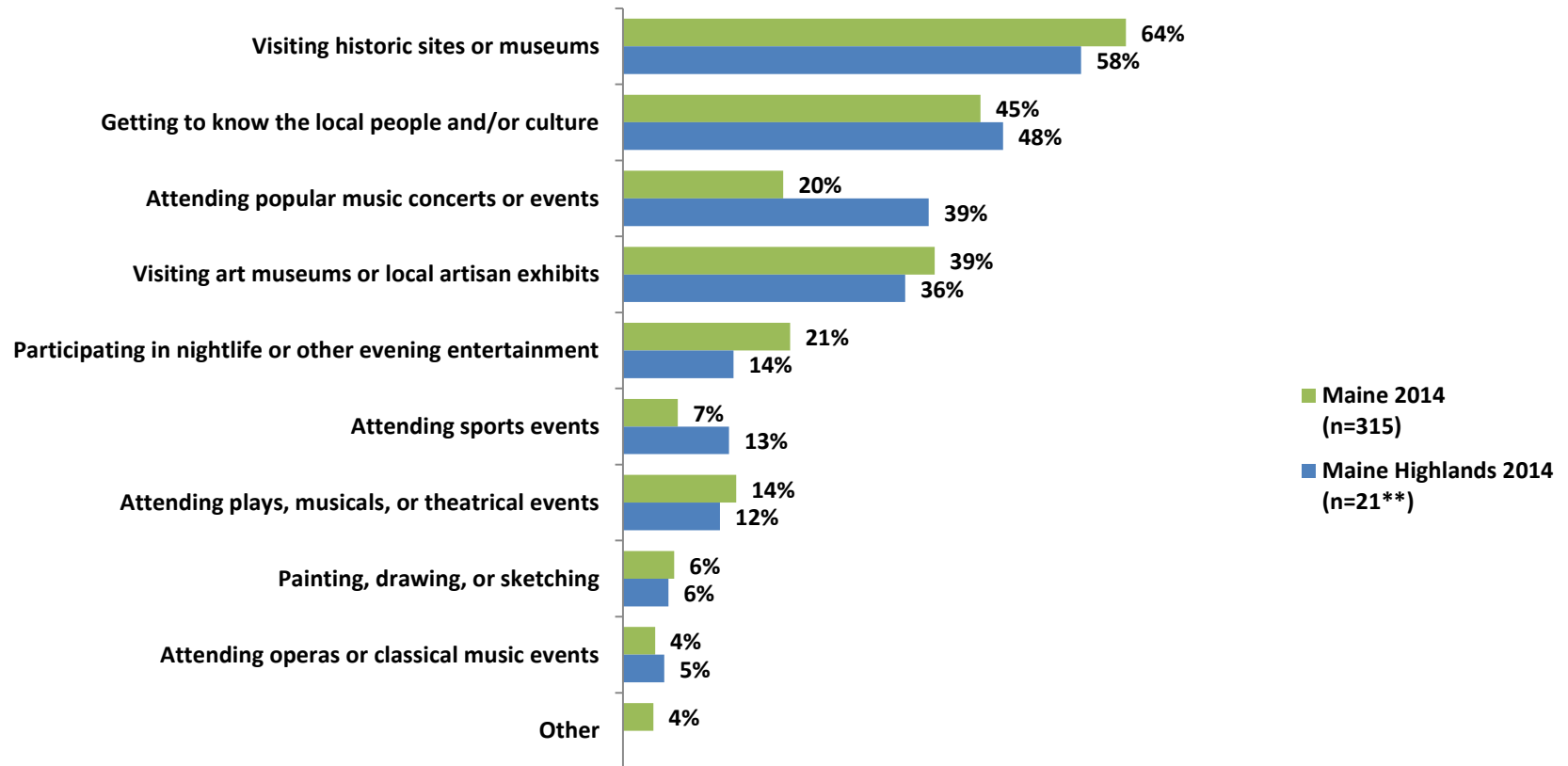
\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

\*\*Please note small sample size.

# Visiting historic sites or museums is the most common history or culture activity participated in by day visitors.

## History or Culture Activities\*

Base: Those who report history or culture as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

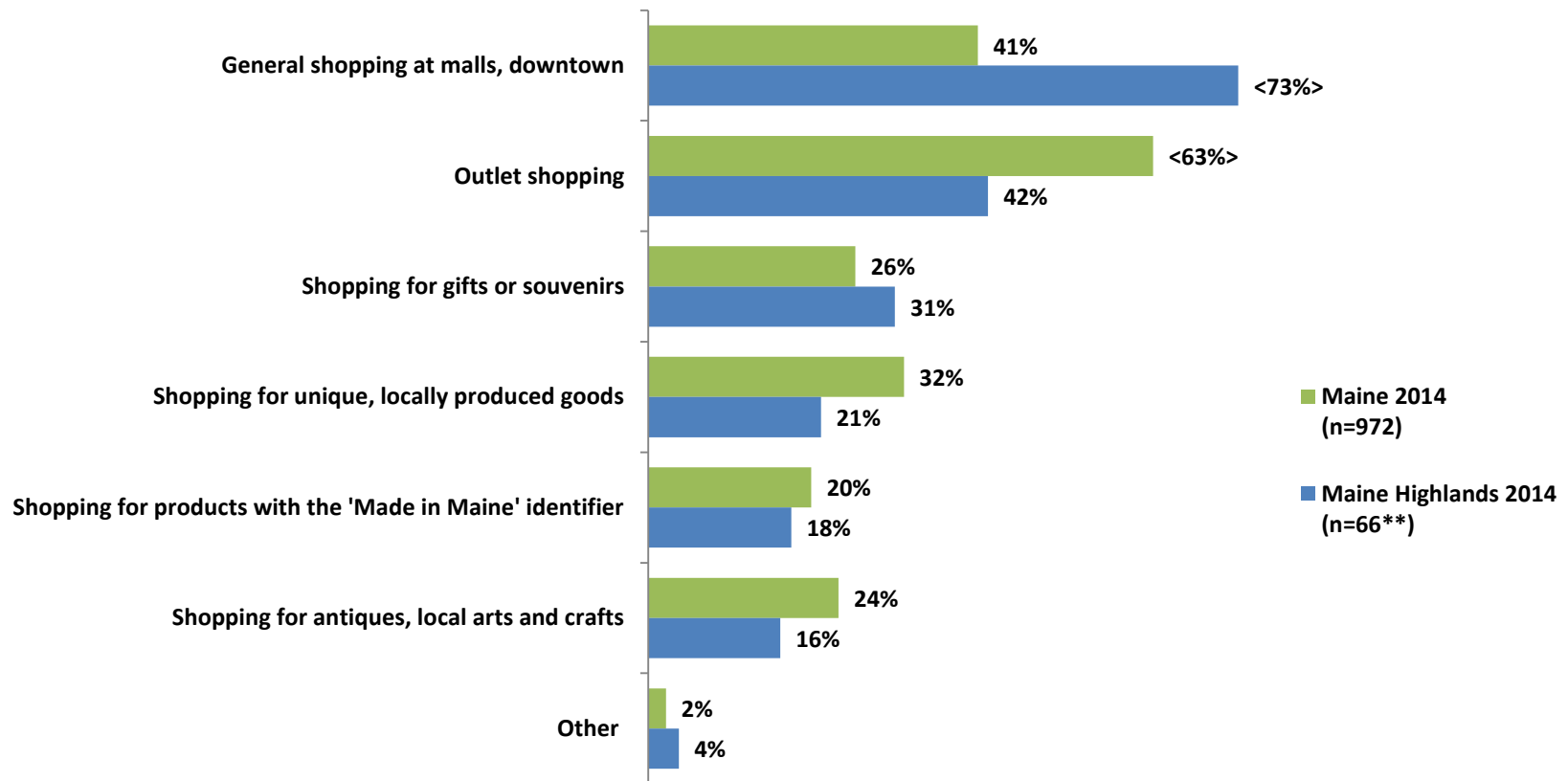
\*\*Please note very small sample size.

# Three in four day visitors who are interested in shopping visited malls and downtown shopping areas while in the Maine Highlands.

- Day visitors to the Maine Highlands region are more likely to shop at malls and downtown and less likely to shop at outlets than are day visitors to the State of Maine as a whole .

## Shopping Activities\*

Base: Those who report shopping as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

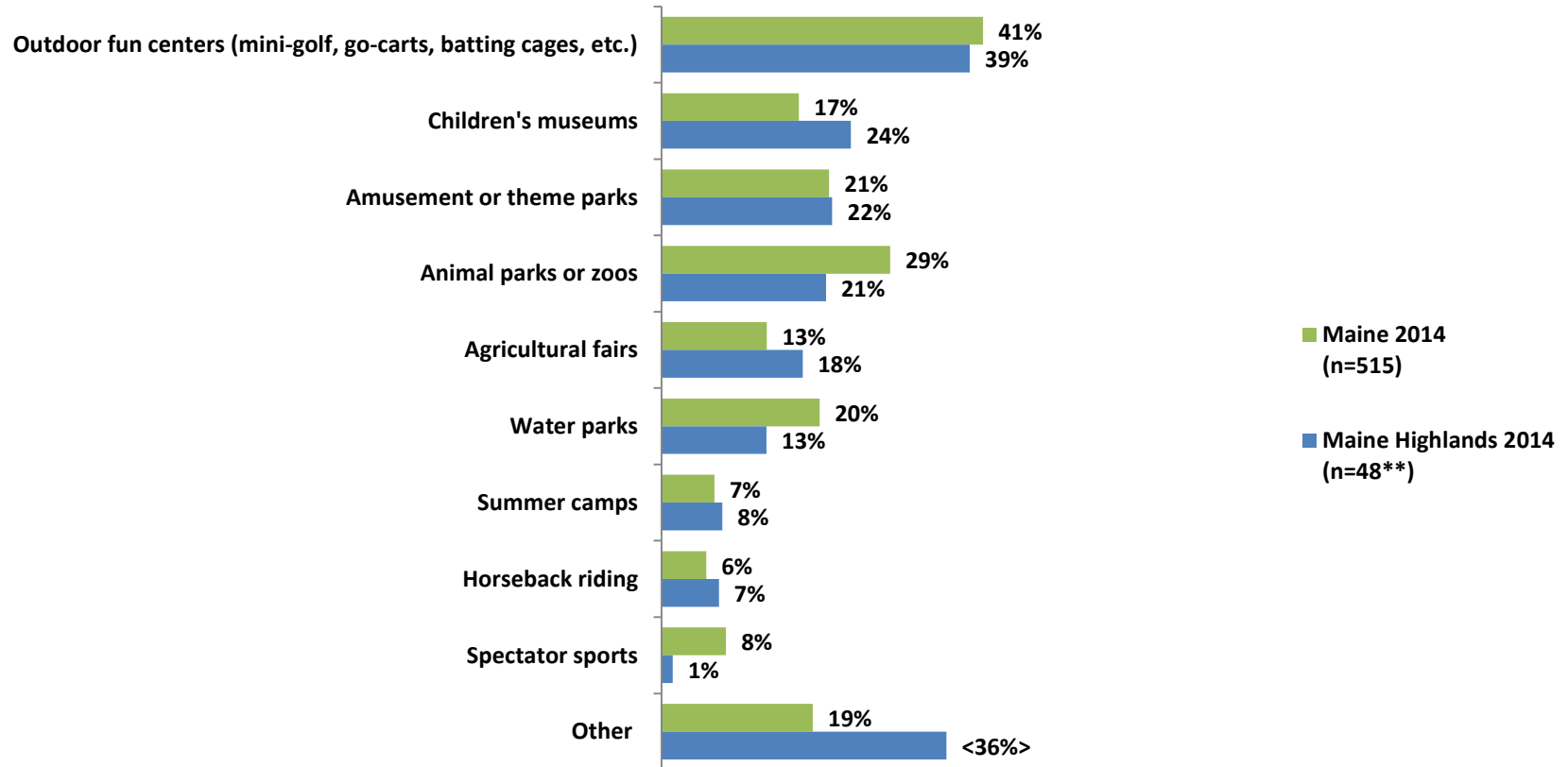
\*\*Please note small sample size.



# Outdoor fun centers are the most frequently mentioned activity among day visitors interested in family fun/children's activities.

## Family Fun/Children's Activities\*

Base: Those who report family fun/children's activities as an interest area for this Maine trip



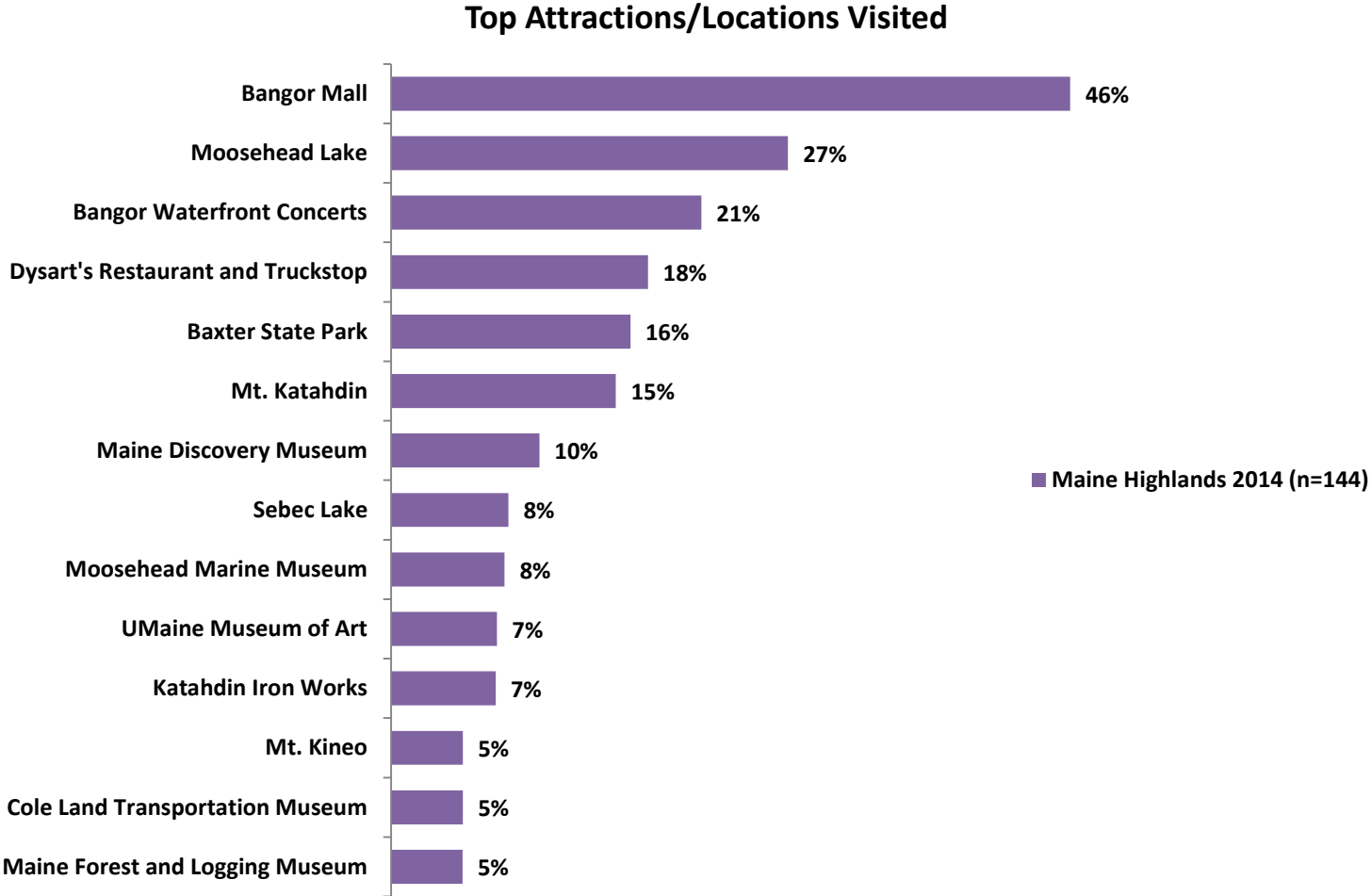
Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

\*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

\*\*Please note small sample size.

# The most visited attraction by day visitors to the Maine Highlands region is the Bangor Mall.



Q23: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

# Comparison of *Maine Highlands* Visitors to Maine Visitors



# Comparisons: Region vs. State

- Visitors to the Maine Highlands tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in some visitor demographics, visitor origin, and the activities they participate in while visiting.
- Highlights – Maine Highlands region vs. State visitors:

## Visitor Origin

- A **greater proportion** of overnight and day visitors to the region from **Canada**.
- A **lesser proportion** of overnight and day visitors to the region from **the United States**.
- A **greater proportion** of overnight and day visitors from **Maine**.
- A **lesser proportion** of day visitors from **Massachusetts** and **New Hampshire**.

## Visitor Demographics

- Both overnight and day visitors to the region have **lower annual household incomes** and are **younger** on average.
- Day visitors to the region are **less likely to have a college degree**.

# Comparisons: Region vs. State

- Highlights Continued:

## Trip Interest Areas – Overnight and Day Visitors

- Less likely to want to pursue **food/beverage/culinary** interests.

## Trip Interest Areas – Day Visitors

- Less likely to want to pursue the following interest areas:
  - Shopping
  - Water Activities

## Maine Trip Interests and Importance (Importance Index)

### Overnight Visitors

- More likely to place importance on **shopping** and **active outdoor activities**.
- Less likely to place importance on **food/beverage/culinary activities**.

### Day Visitors

- Less likely to place importance on **food/beverage/culinary activities** and **water activities**.

# Comparisons: Region vs. State

- Highlights Continued:

## Trip Activities – Overnight and Day Visitors

- **More likely to be:**
  - Camping
  - Shopping at malls or downtown
- **Less likely to be:**
  - Outlet shopping
  - Enjoying ocean views or rocky coast
  - Eating lobster or other local seafood
  - Going to the beach

# Comparisons: Region vs. State

- Highlights Continued:

## Trip Activities – Overnight Visitors

- **More likely to be:**
  - Enjoying the mountain views
  - Viewing fall colors
  - Visiting Farmer’s Markets
  - Attending summer camps
- **Less likely to be:**
  - Outdoor swimming
  - Shopping for unique, locally produced goods

## Trip Activities – Day Visitors

- **More likely to be:**
  - Wildlife viewing/bird watching
  - Sailing



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