

Maine Office of Tourism Visitor Tracking Research 2015 Calendar Year Annual Report

Regional Insights: Kennebec Valley

Prepared by



April 2016

Table of Contents

| | |
|---|----|
| Research Objectives and Methodology | 3 |
| Overnight Visitors: | |
| Traveler Description | 6 |
| Trip Experience | 11 |
| Day Visitors: | |
| Traveler Description | 25 |
| Trip Experience | 30 |
| Comparison of Kennebec Valley Visitors to Maine Visitors | 43 |

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 2015 for travel to Maine occurring from December 2014 through November 2015. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,779
 - Maine Day Visitor – 1,755
 - National Omnibus Survey – 17,812

Research Objectives and Methodology

- The following report summarizes results among visitors to the Kennebec Valley tourism region during 2015, including:
 - 139 overnight visitors, and
 - 105 day visitors.
- Throughout this report, data for the Kennebec Valley 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 2014 and 2015 are also highlighted for both the Kennebec Valley 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 Kennebec Valley region are about 41 years old, on average, and have annual household incomes just under \$97,000. Two-thirds have at least a college degree and are employed full-time. Six in ten are married.
- Overnight visitors to the Kennebec Valley region trend younger than visitors to the State overall.

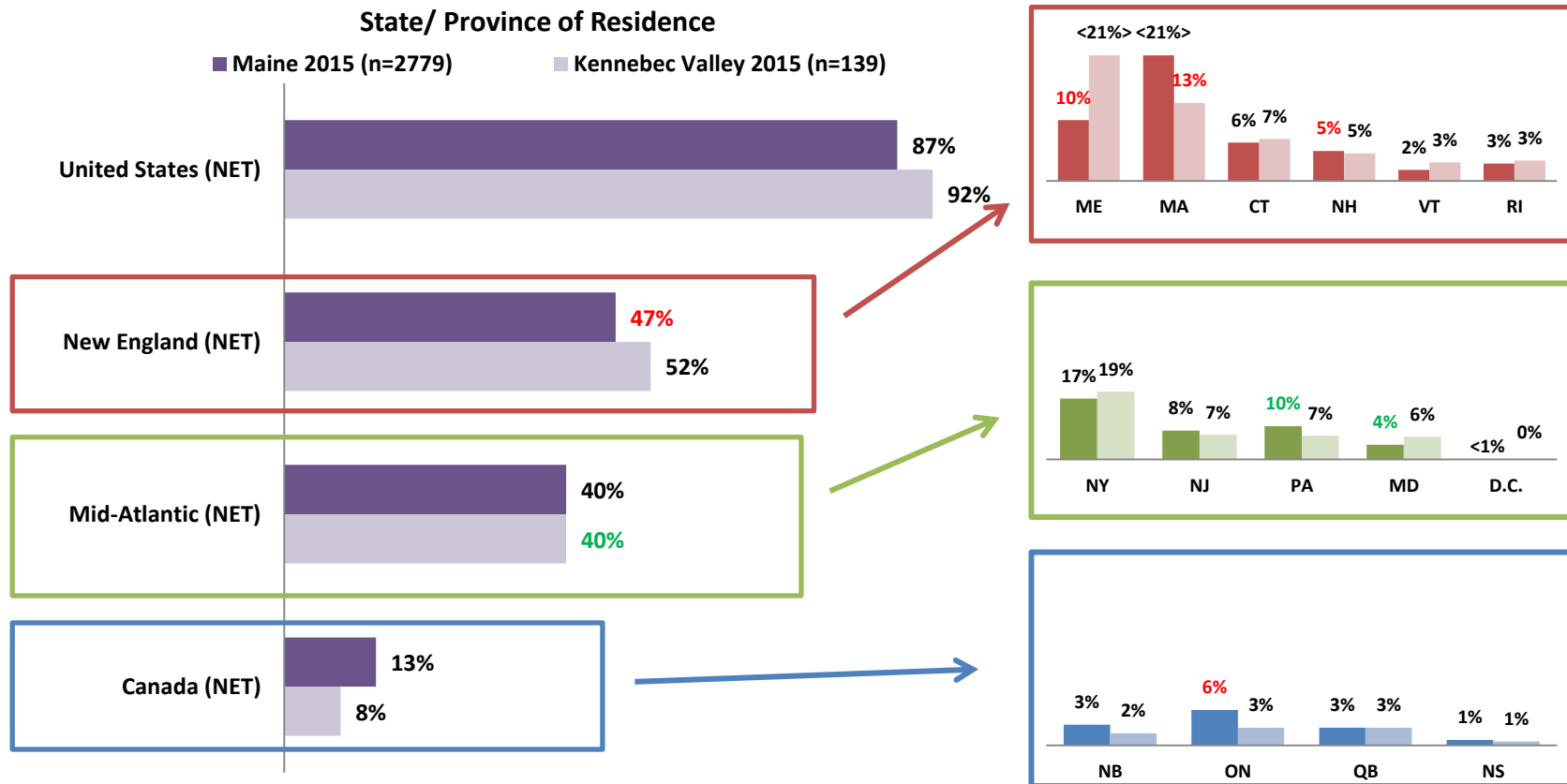
| Overnight Visitors | Maine 2015 (n=2779) | Kennebec Valley 2015 (n=139) |
|--------------------------|---------------------------|------------------------------------|
| Age: | | |
| < 35 | 30% | 39% |
| 35 - 44 | 19% | 28% |
| 45 - 54 | 19% | 13% |
| 55 + | <31%> | 20% |
| Mean Age (Years) | <45.4> | 41.0 |
| Income: | | |
| < \$50,000 | 17% | 24% |
| \$50,000 - \$99,999 | 41% | 40% |
| \$100,000 + | 42% | 36% |
| Mean Income (Thousands) | \$103,770 | \$96,790 |
| Female | 58% | 59% |
| College Degree or Higher | 73% | 67% |
| Married | 64% | 61% |
| Employed Full Time | 63% | 66% |

<> 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.

Nine in ten visitors to the Kennebec Valley region originate from the United States, with most arriving from New England.

- In-state visitors make up a greater proportion of overnight visitors to the Kennebec Valley region compared to overnight visitors to the State of Maine overall.
- The proportion of visitors from the Mid-Atlantic region to the Kennebec Valley region increased from 2014 (27%) to 2015 (40%).



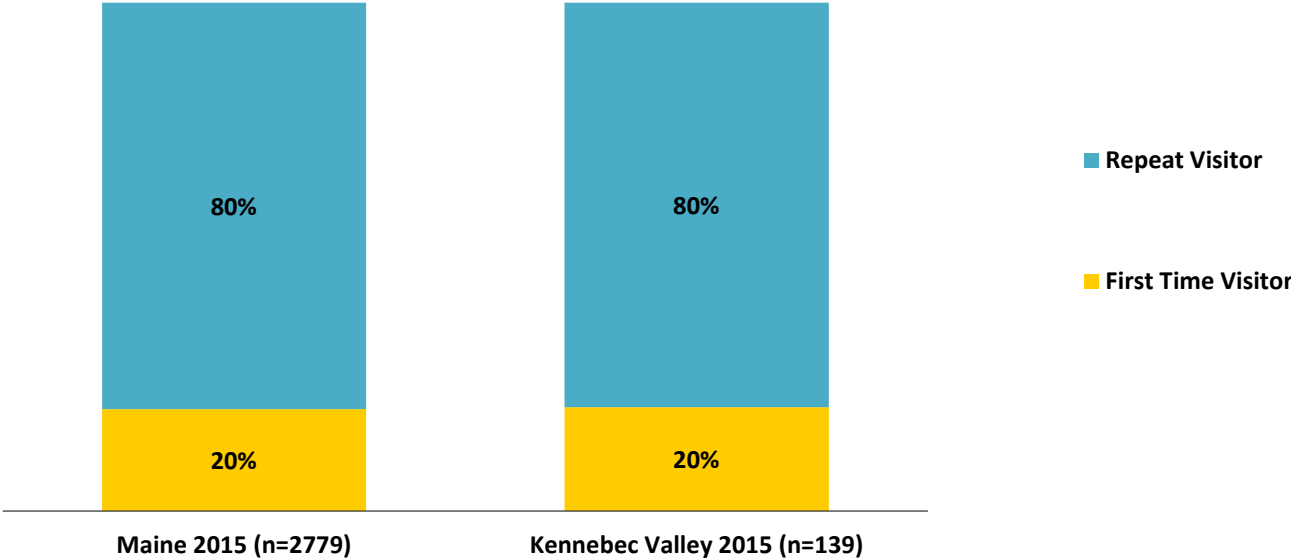
State/ Province of Residence

<> 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 overnight visitors to the Kennebec Valley have previously visited Maine.

Repeat vs. First Time Visitors



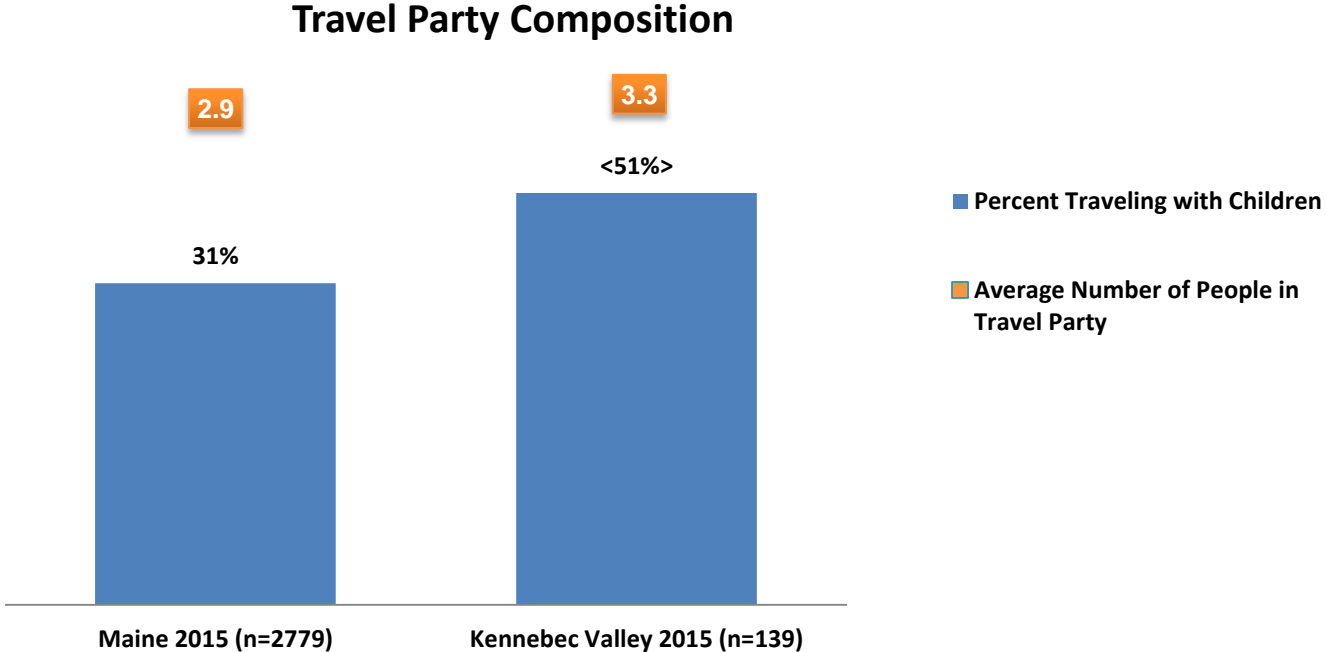
Q11. Was this your first visit in Maine?

Q12. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

<> 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 overnight visitors to the Kennebec Valley are traveling with children, a significantly greater proportion than among overnight visitors to Maine overall.



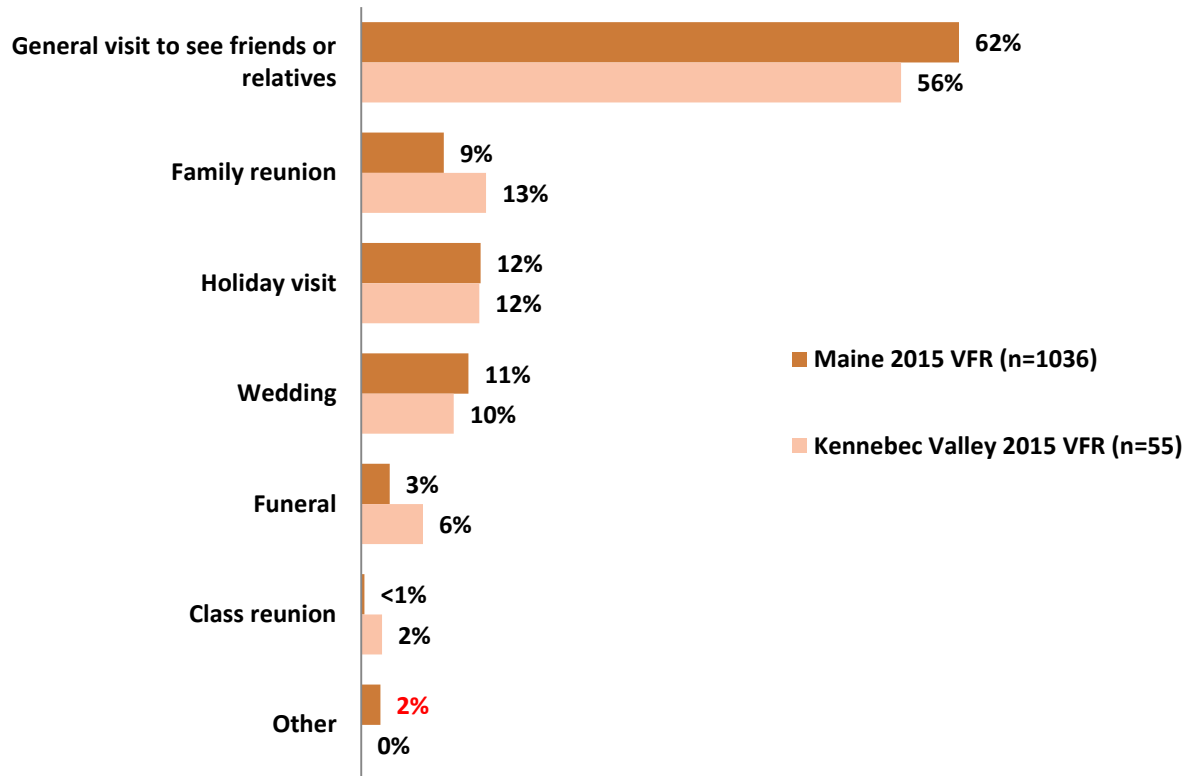
Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q19. How many of these people were: Children?
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



The most common reason for an overnight VFR trip to the Kennebec Valley is a *general visit to see friends or relatives*.

Primary Purpose of Overnight VFR Trips



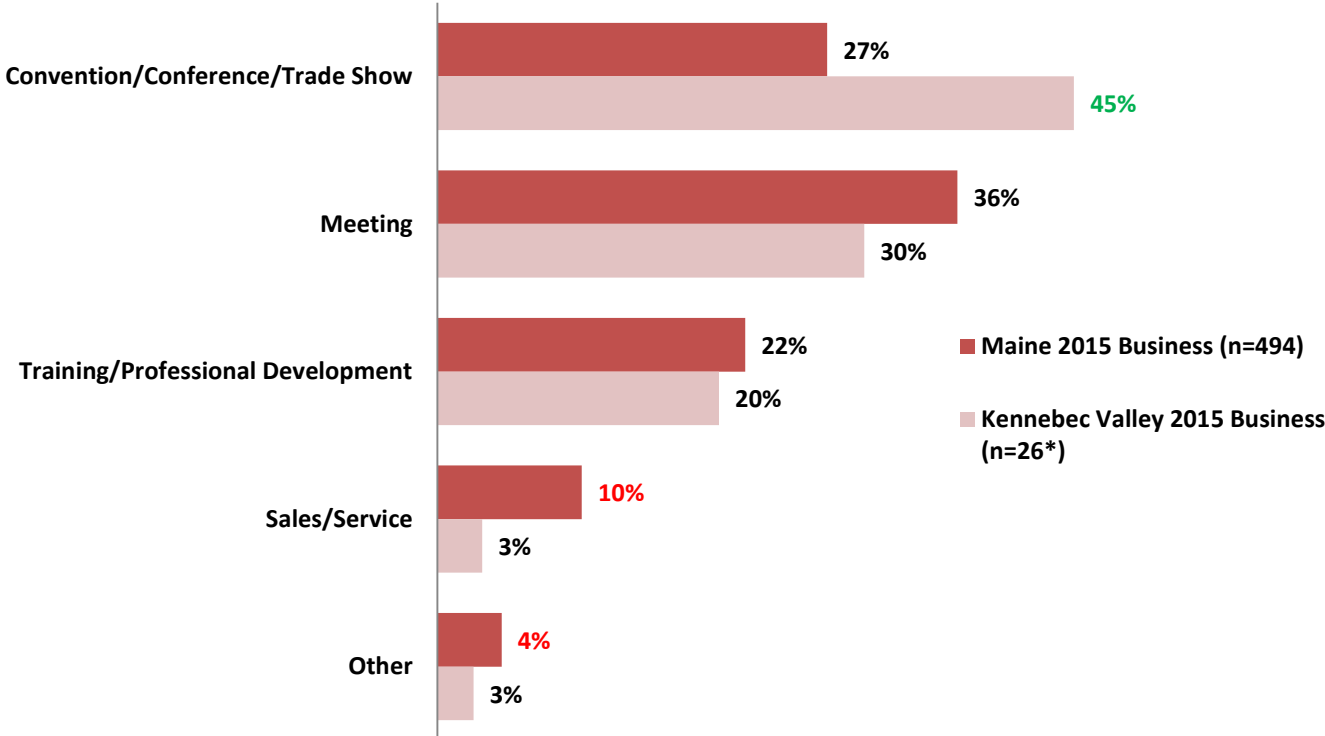
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> 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.

Nearly half of overnight business travelers to the region cite a *convention/conference/tradeshow* as the primary purpose of their trip.

Primary Purpose of Overnight Business Trips



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

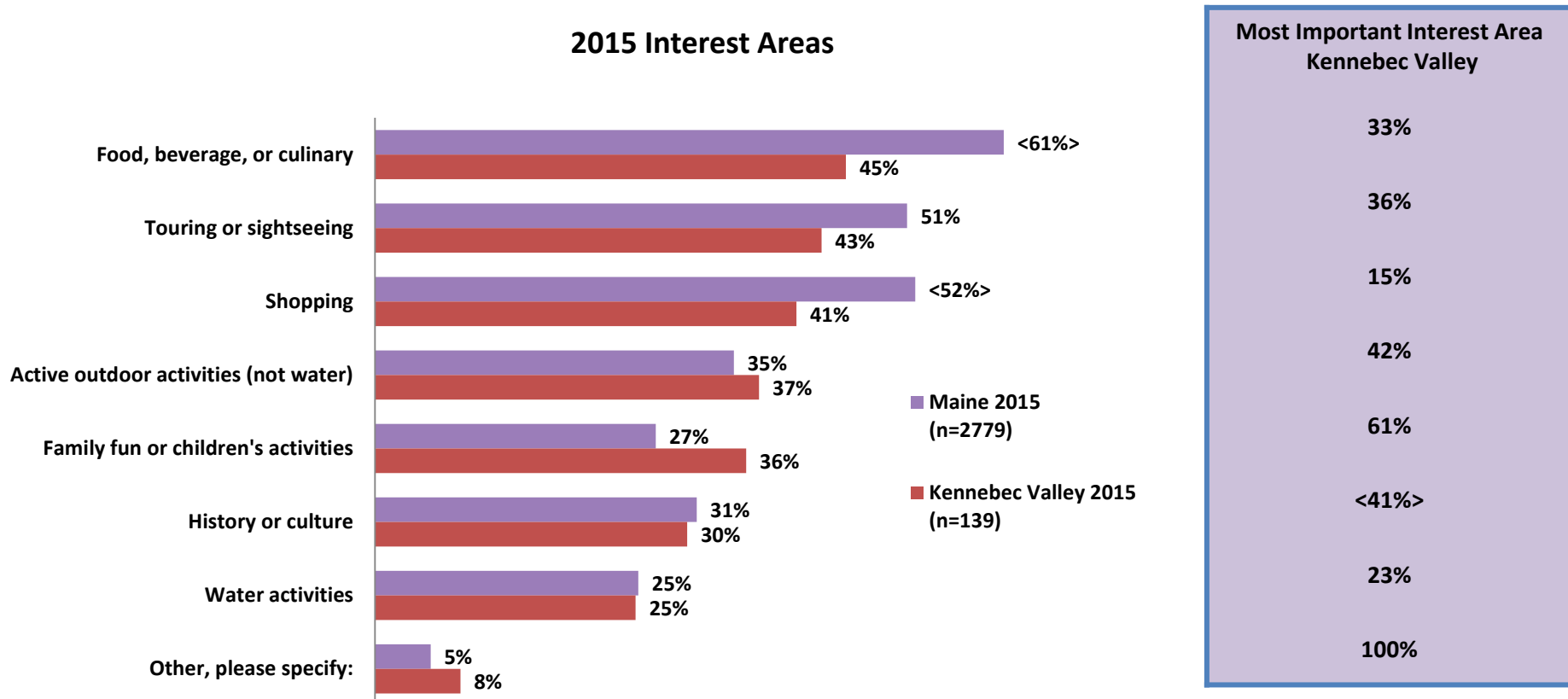
<> indicates a significant difference between subgroups at the 95% confidence level.

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

*Please note extremely small sample size.

The most common interest areas among Kennebec Valley overnight visitors include *food/beverage/culinary activities, touring/sightseeing, and shopping.*

- Lesser proportions of Kennebec Valley visitors are interested in *food/beverage/culinary activities* and *shopping* as compared to overnight visitors to the State of Maine overall.



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

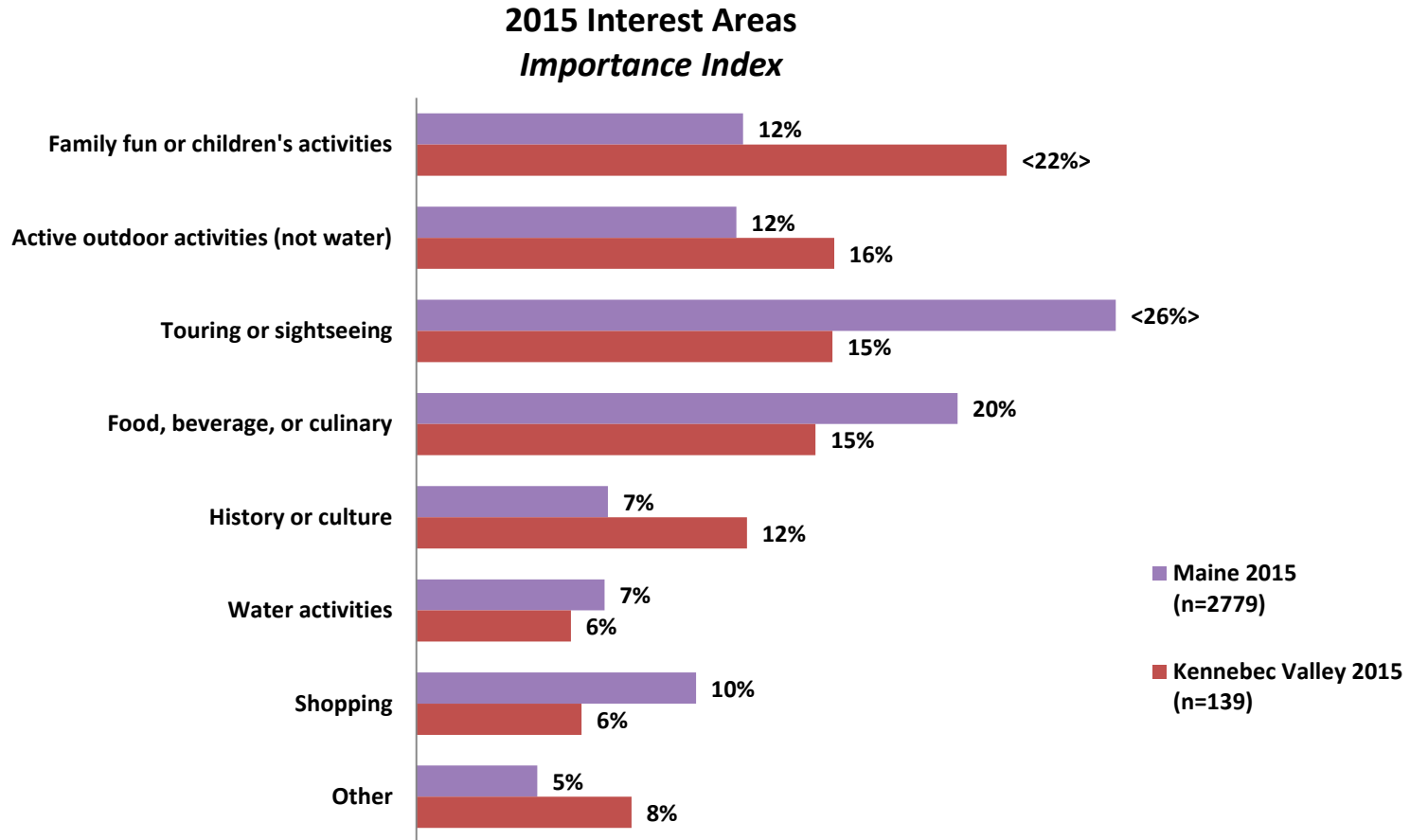
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

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

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

When analyzing both interest and importance, *family fun or children’s activities* rank highest among overnight visitors to this region, followed by *active outdoor activities*.

- When analyzing both interest and importance in deciding to visit, Kennebec Valley overnight visitors are more likely than visitors to Maine as a whole to be interested in *family fun/children’s activities* and less likely to be interested in *touring/sightseeing*.



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



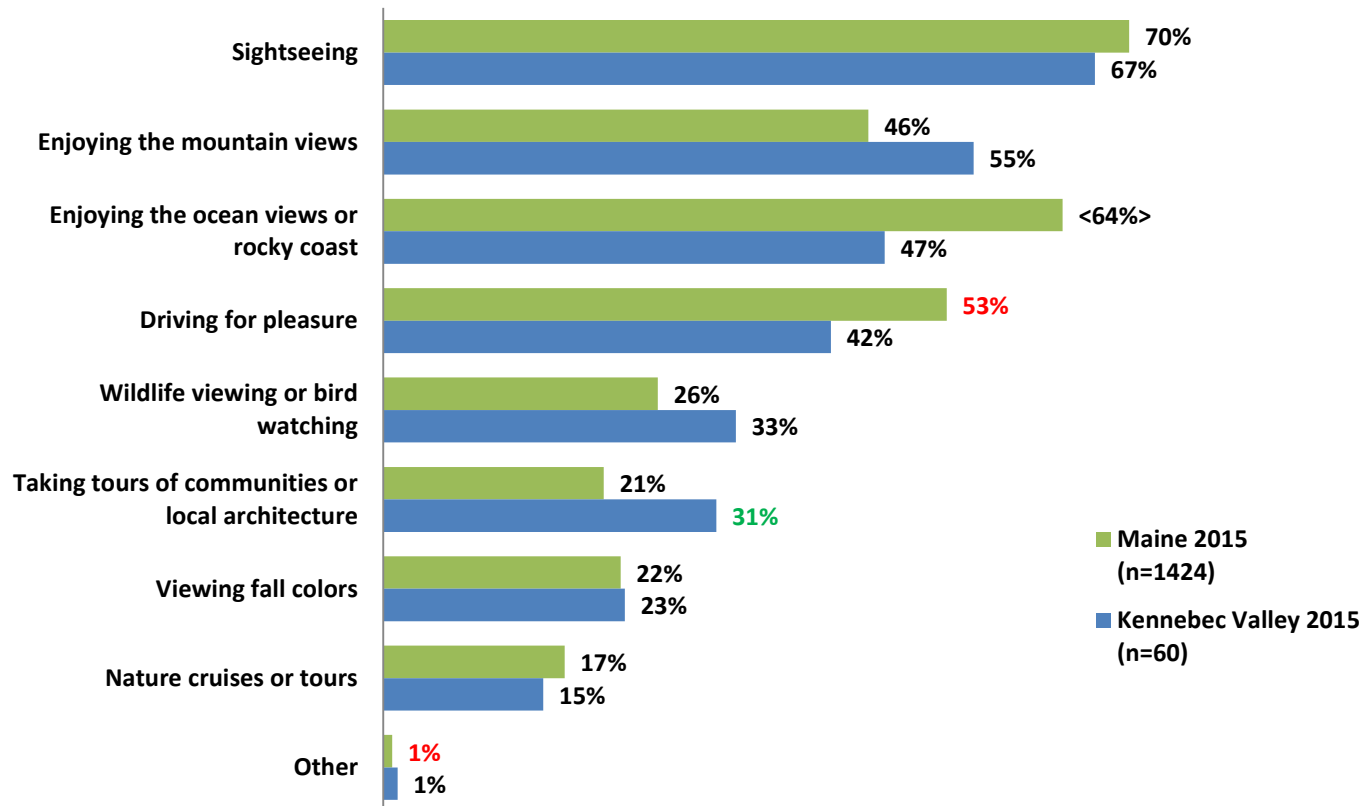
Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15
 <> indicates 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.

Sightseeing and enjoying the mountain views are the most common touring/sightseeing activities among overnight visitors to this region.

- A lesser proportion of Kennebec Valley visitors *enjoy the ocean views or rocky coast* compared to overnight visitors to the State of Maine overall.

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.

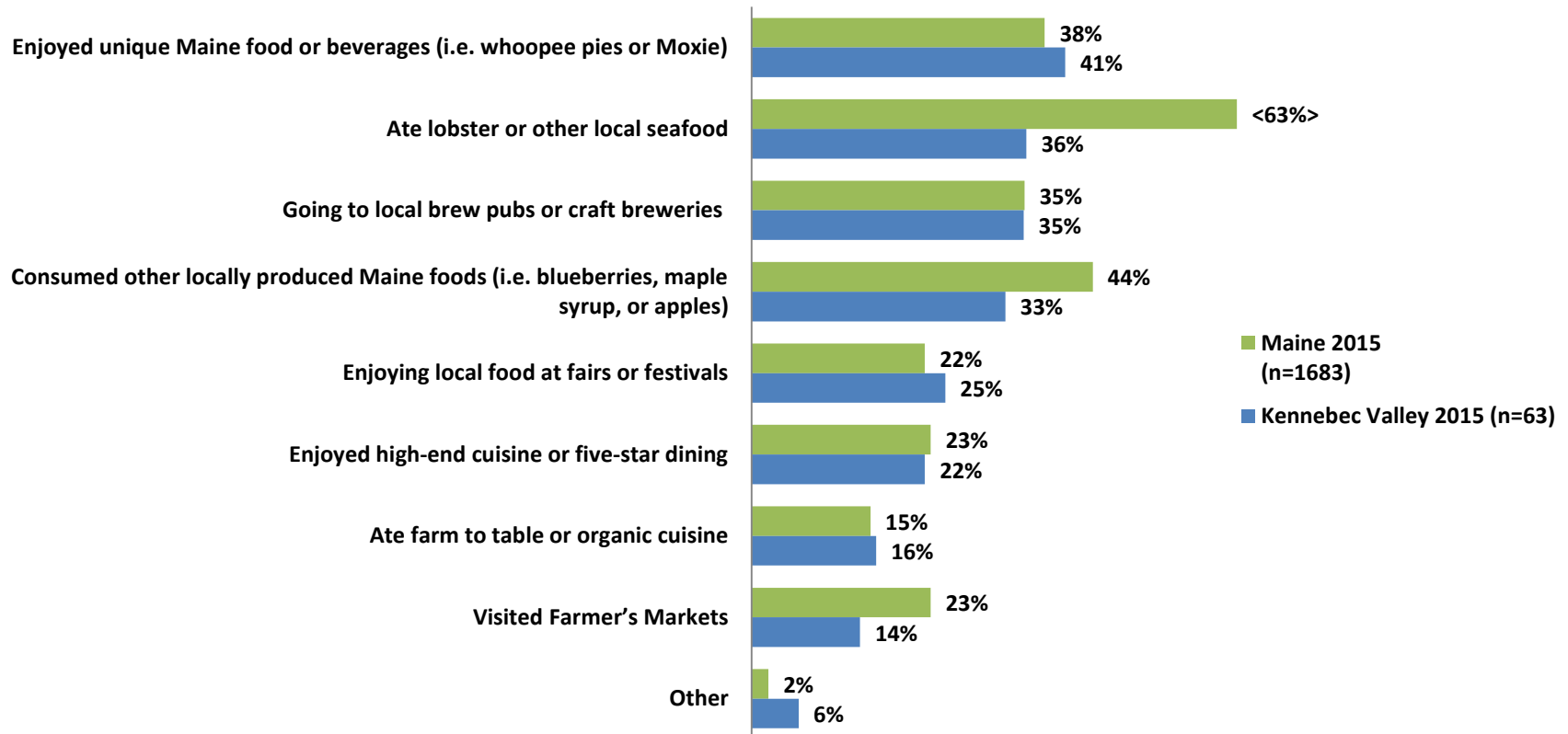
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Enjoying unique Maine food or beverages is the most common activity among overnight visitors to the Kennebec Valley region who are interested in food/beverage/culinary activities.

- Among overnight visitors interested in food/beverage/culinary activities, those visiting the Kennebec Valley are less likely to *eat lobster or other local seafood* than are those visiting the State of Maine overall.

Food, Beverage, or Culinary Activities

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



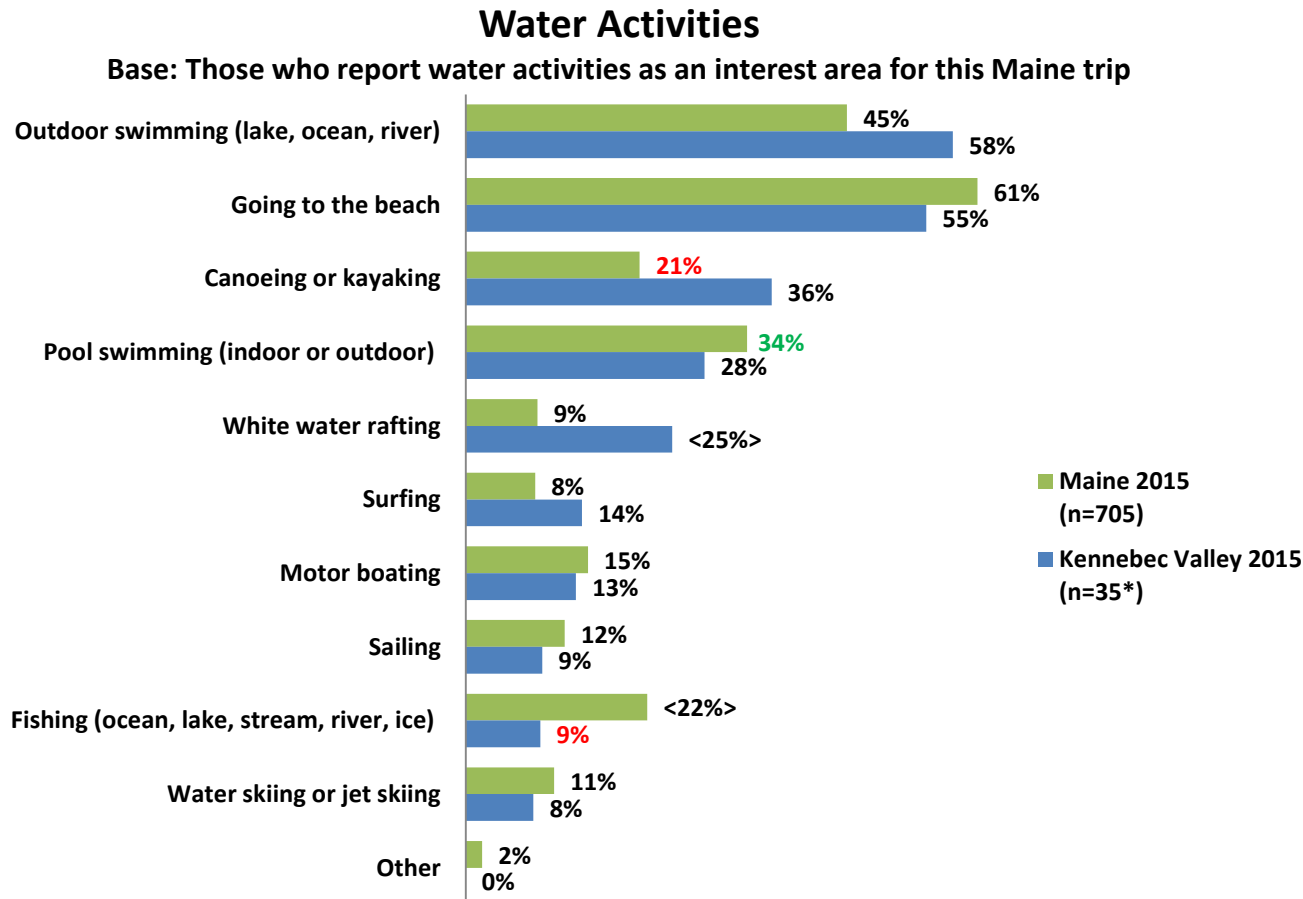
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

Outdoor swimming and going to the beach are the most common water activities pursued by overnight visitors to this region.

- A greater proportion of Kennebec Valley visitors go *white water rafting* as compared to overnight visitors to the State of Maine overall.



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.

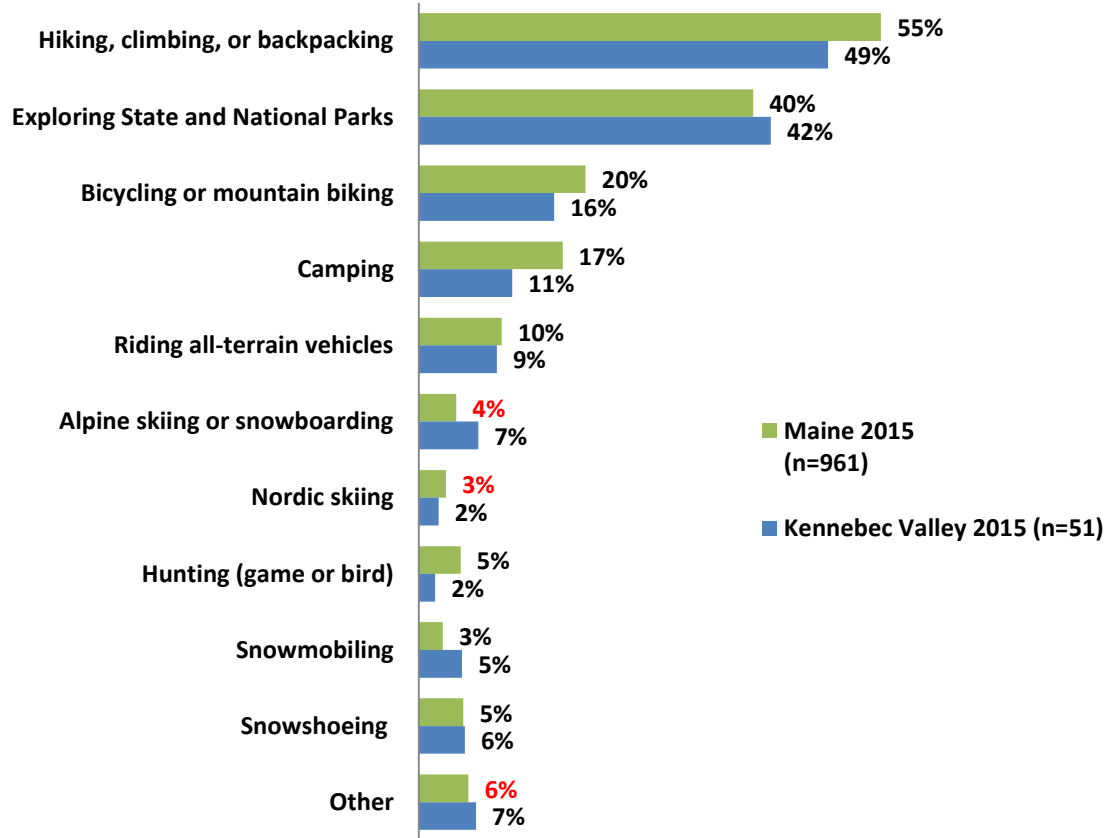
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note very small sample size.

Hiking/climbing/backpacking and exploring State and National parks are the most common active outdoor activities among the region's overnight visitors.

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.

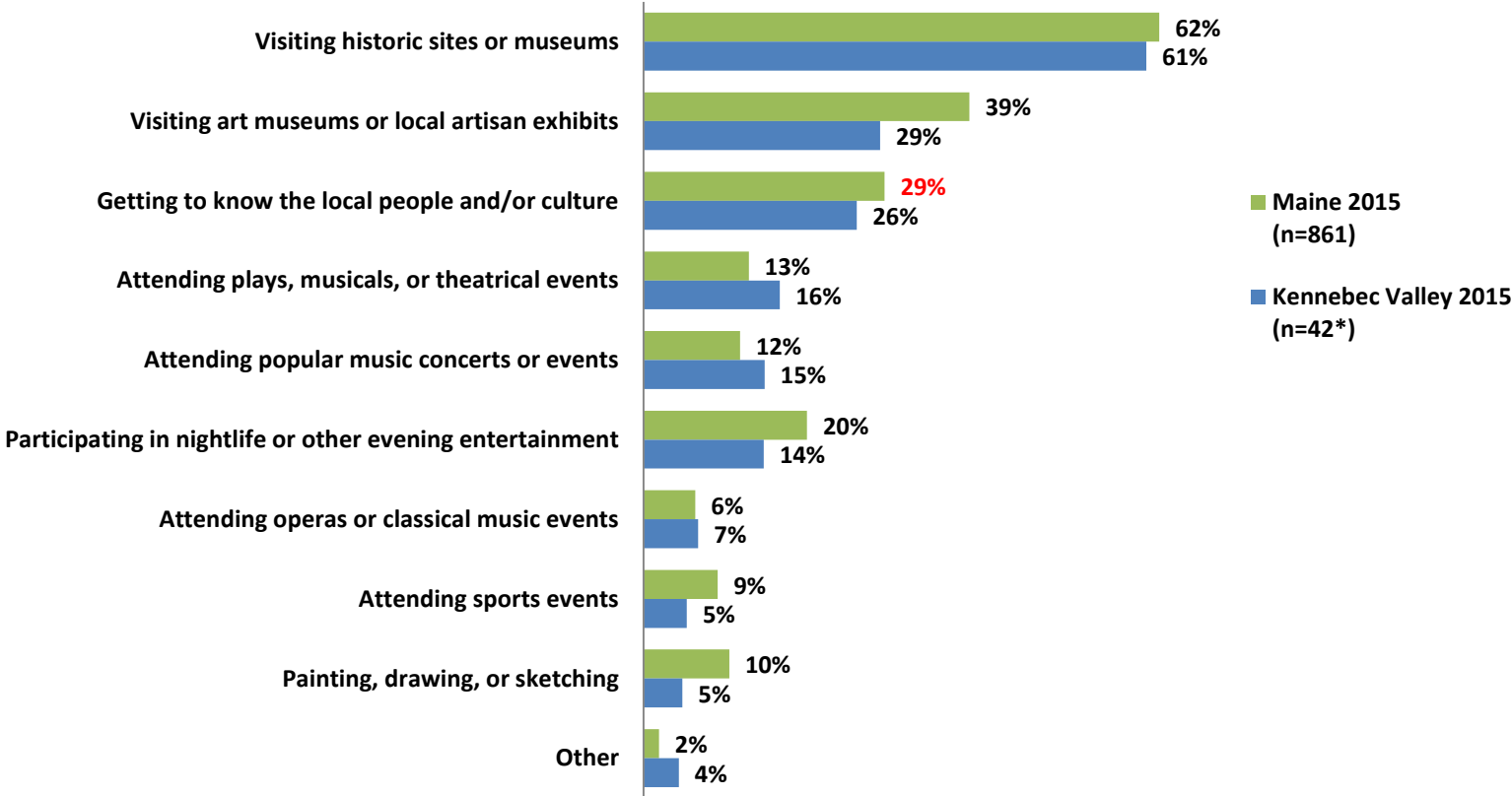
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Visiting historic sites/museums is the most common history/culture activity pursued by overnight visitors to the Kennebec Valley region.

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.

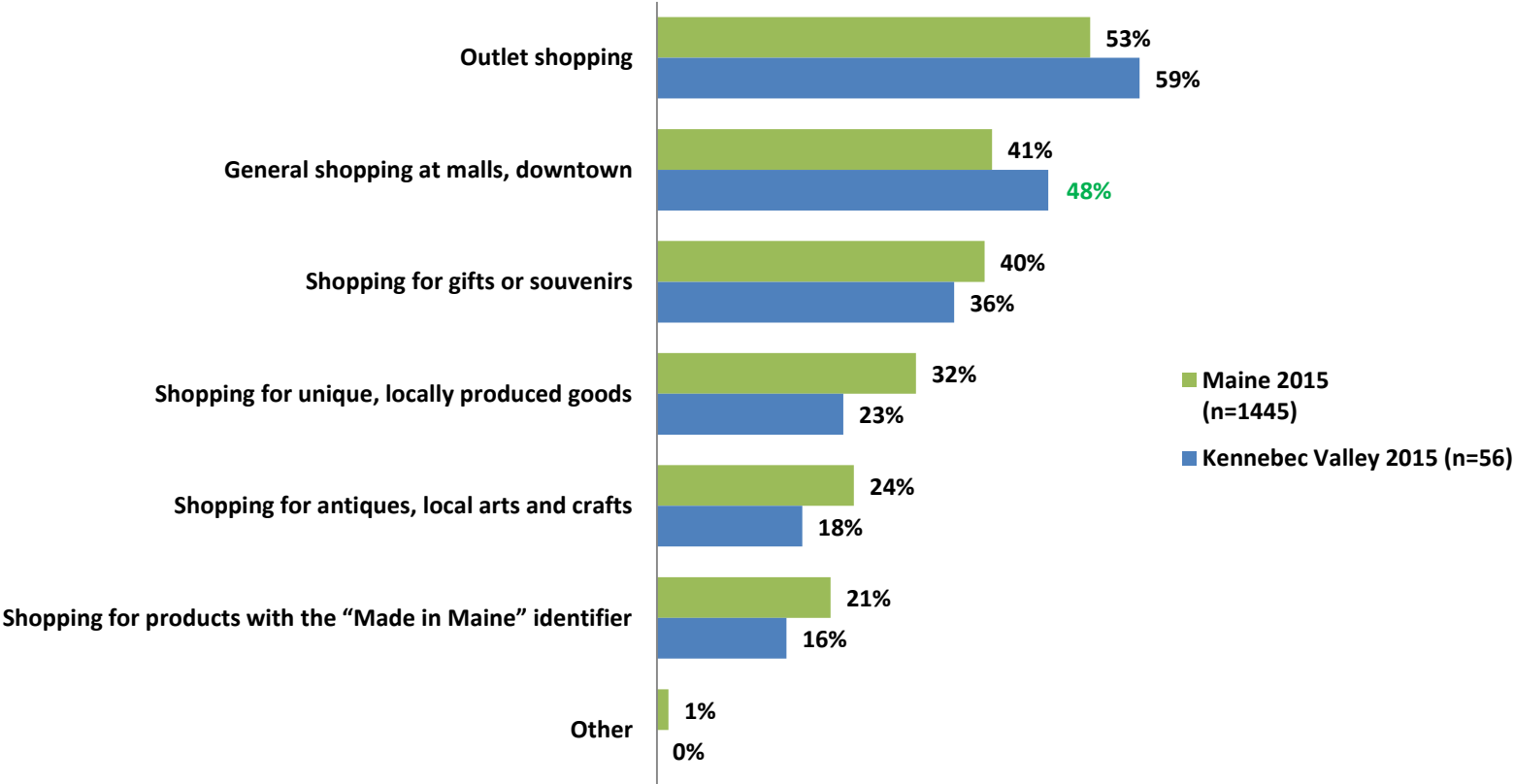
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

Outlet shopping and general shopping at malls or downtown are the most popular shopping activities in 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.

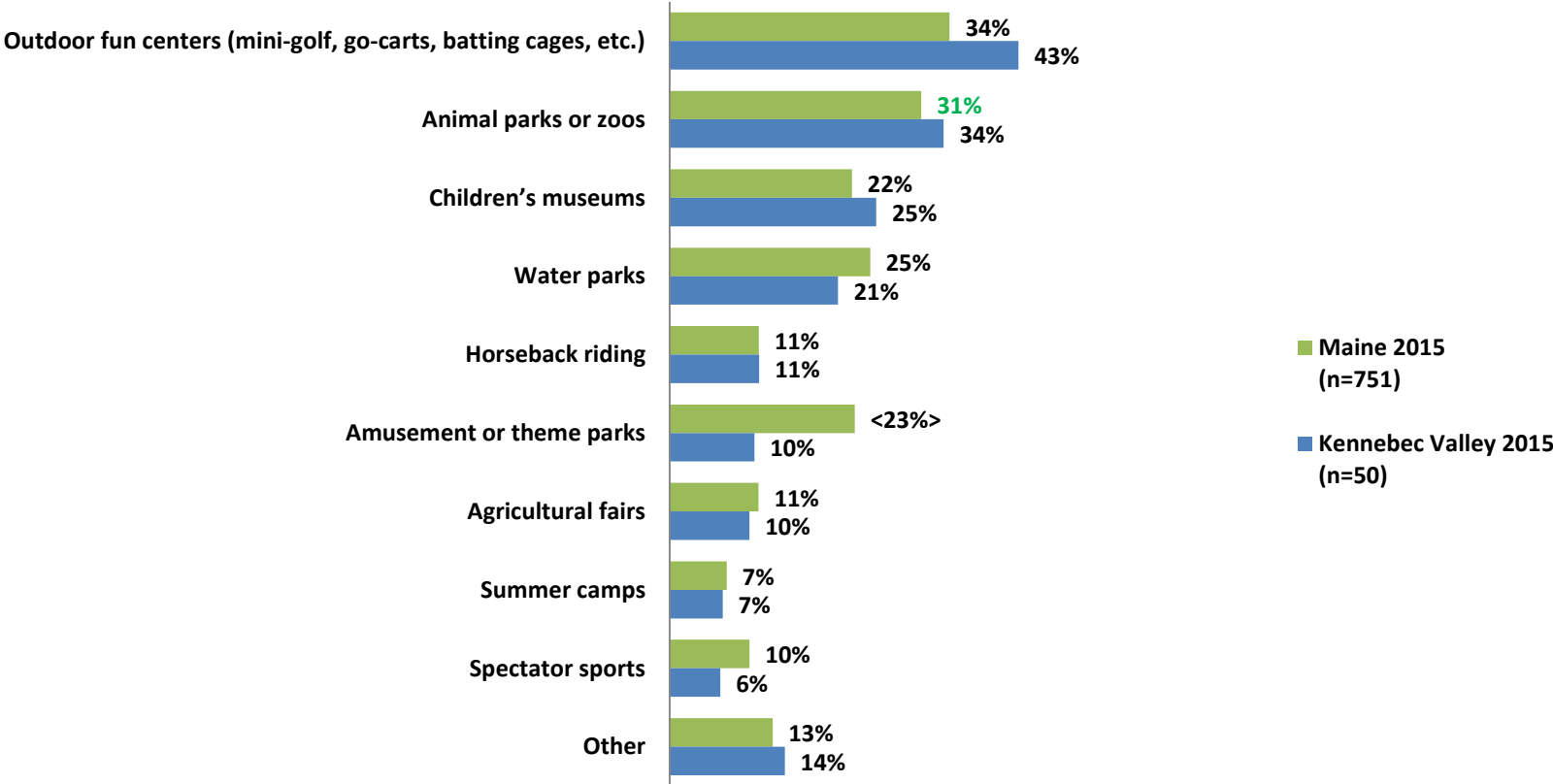
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Outdoor fun centers are the most common family fun/children’s activity among overnight visitors to the Kennebec Valley region.

Family Fun/Children’s Activities

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



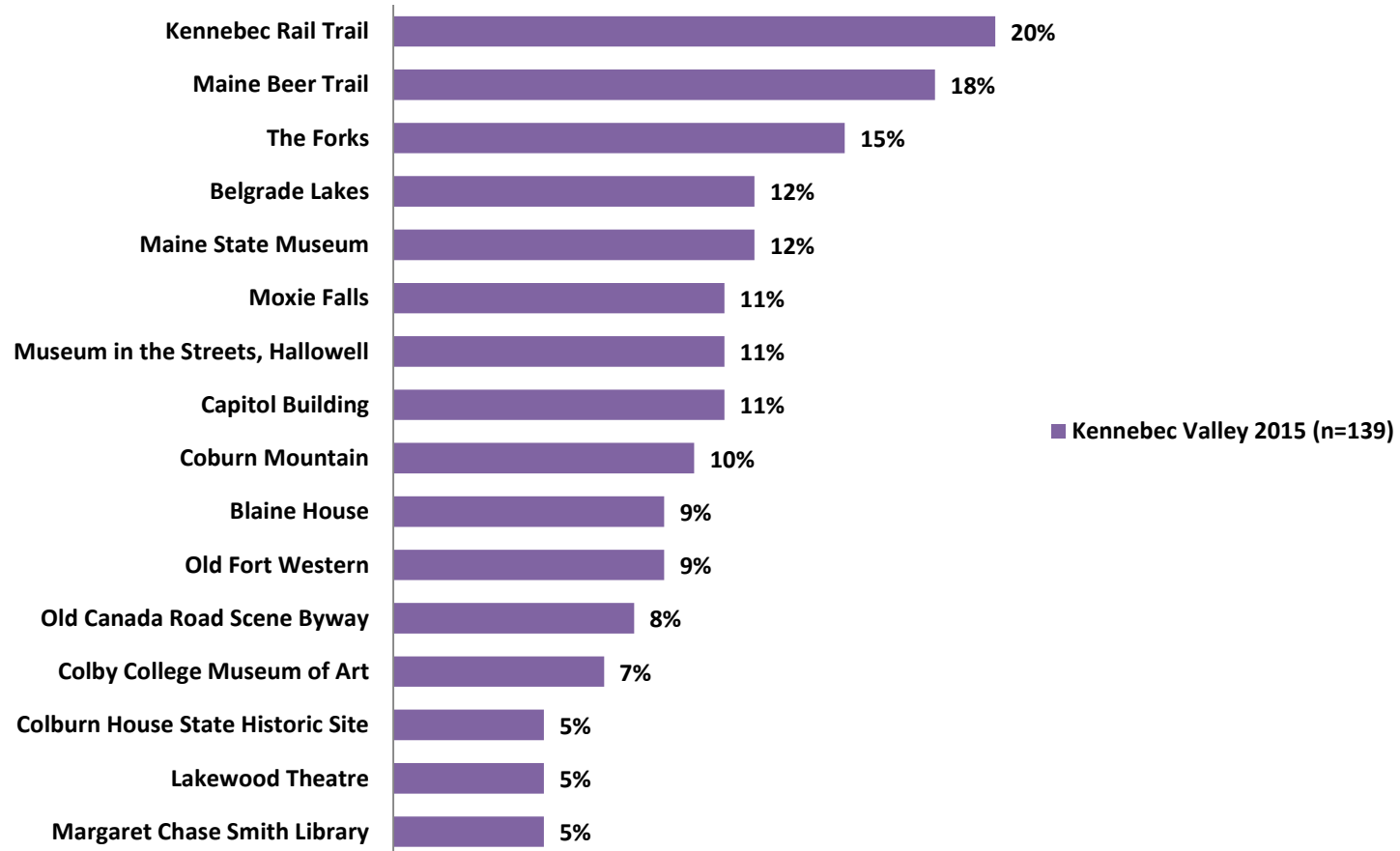
Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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The Kennebec Rail Trail, the Maine Beer Trail, and The Forks are the most popular attractions among overnight visitors to the Kennebec Valley region.

Top Attractions/Locations Visited*



* Does not include response options selected by fewer than 5% of respondents.

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

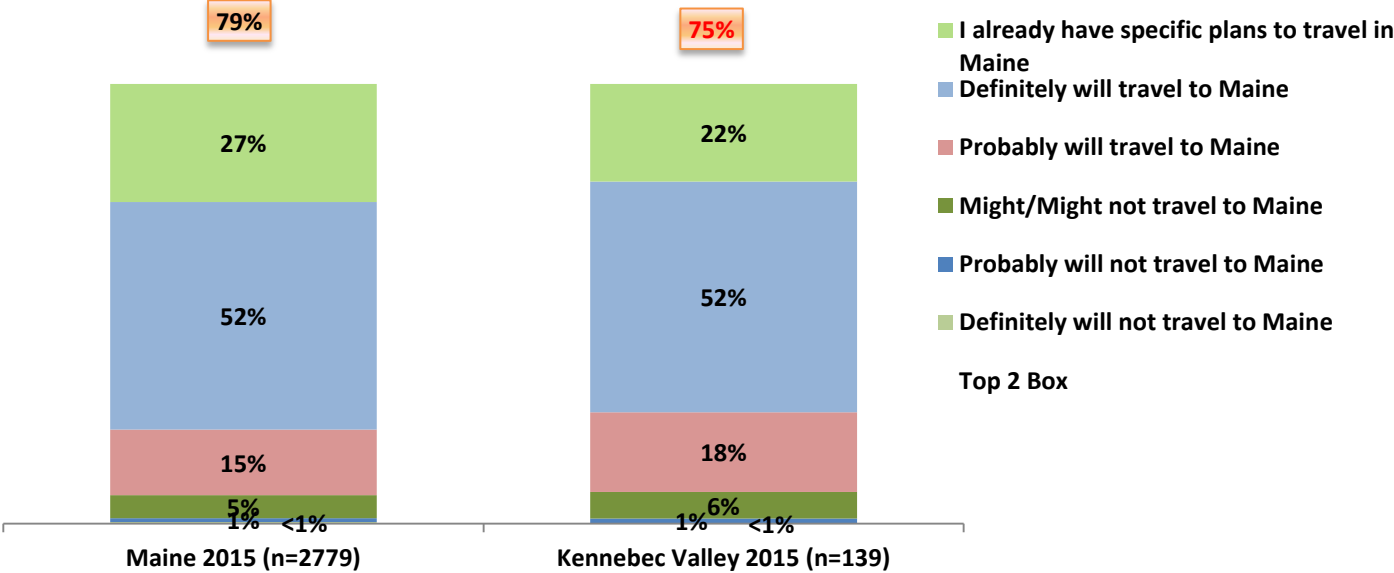
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Note: Does not include response options selected by fewer than 5% of respondents.

Three in four overnight visitors to the Kennebec Valley plan to return to Maine in the next two years.

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?
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Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Kennebec Valley region are 48 years of age, on average, and earn nearly \$90,000 annually. Two-thirds have a college degree, and 60% are employed full-time.

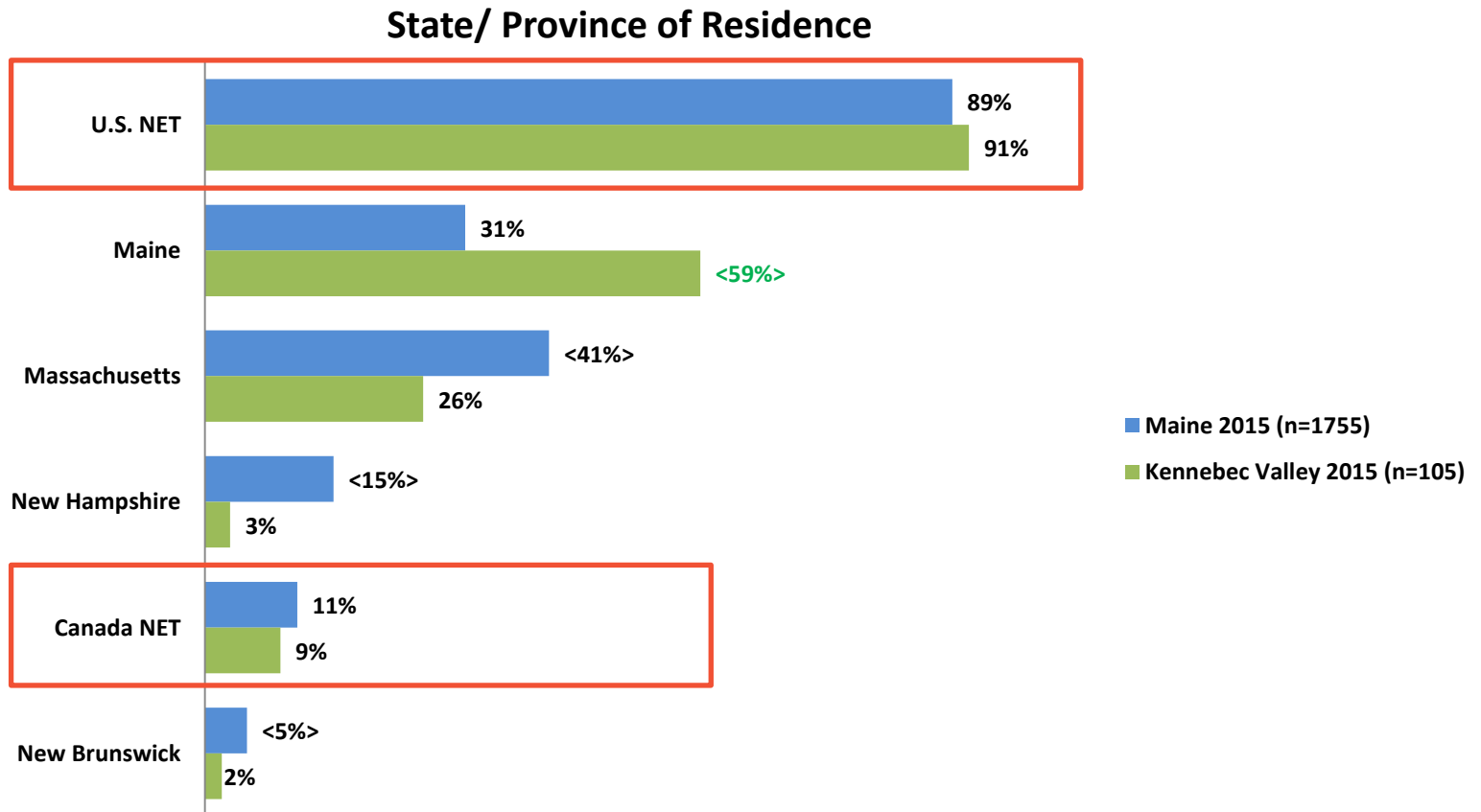
| Day Visitors | Maine 2015 (n=1755) | Kennebec Valley 2015 (n=105) |
|--------------------------|---------------------------|------------------------------------|
| Age: | | |
| < 35 | 25% | 26% |
| 35 - 44 | 16% | 17% |
| 45 - 54 | 21% | 16% |
| 55 + | 38% | 41% |
| Mean Age (Years) | 48.0 | 48.0 |
| Income: | | |
| < \$50,000 | 22% | 27% |
| \$50,000 - \$99,999 | 43% | 38% |
| \$100,000 + | 35% | 35% |
| Mean Income (Thousands) | \$93,020 | \$88,970 |
| Female | 62% | 54% |
| College Degree or Higher | 68% | 68% |
| Married | 60% | 56% |
| Employed Full Time | 55% | 60% |

<> 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.

The majority of day visitors to the Kennebec Valley region are from Maine.

- Kennebec Valley day visitors are less likely to be from Massachusetts, New Hampshire, or New Brunswick as compared to day visitors to Maine as a whole.



Q2. In what State or Province do you reside?

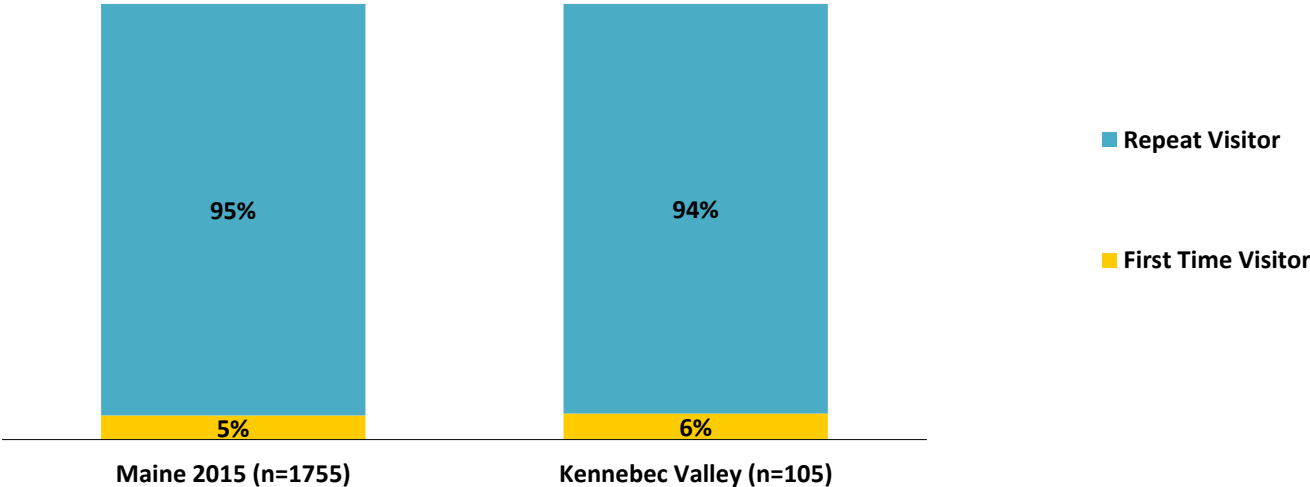
<> indicates a significant difference between subgroups at the 95% confidence level.

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*Please note small sample size.

Nine in ten day visitors to the Kennebec Valley region are repeat visitors.

Repeat vs. First Time Visitors



Q10. Was this your first trip to Maine?

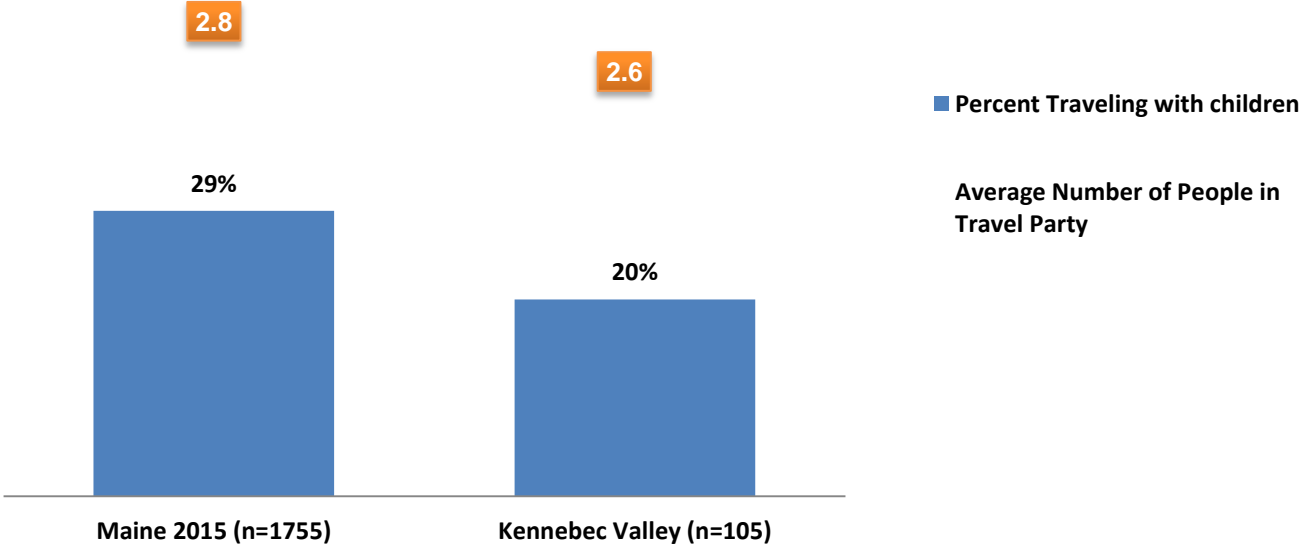
Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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

One in five day visitor travel parties to the Kennebec Valley region include children.

Travel Party Composition



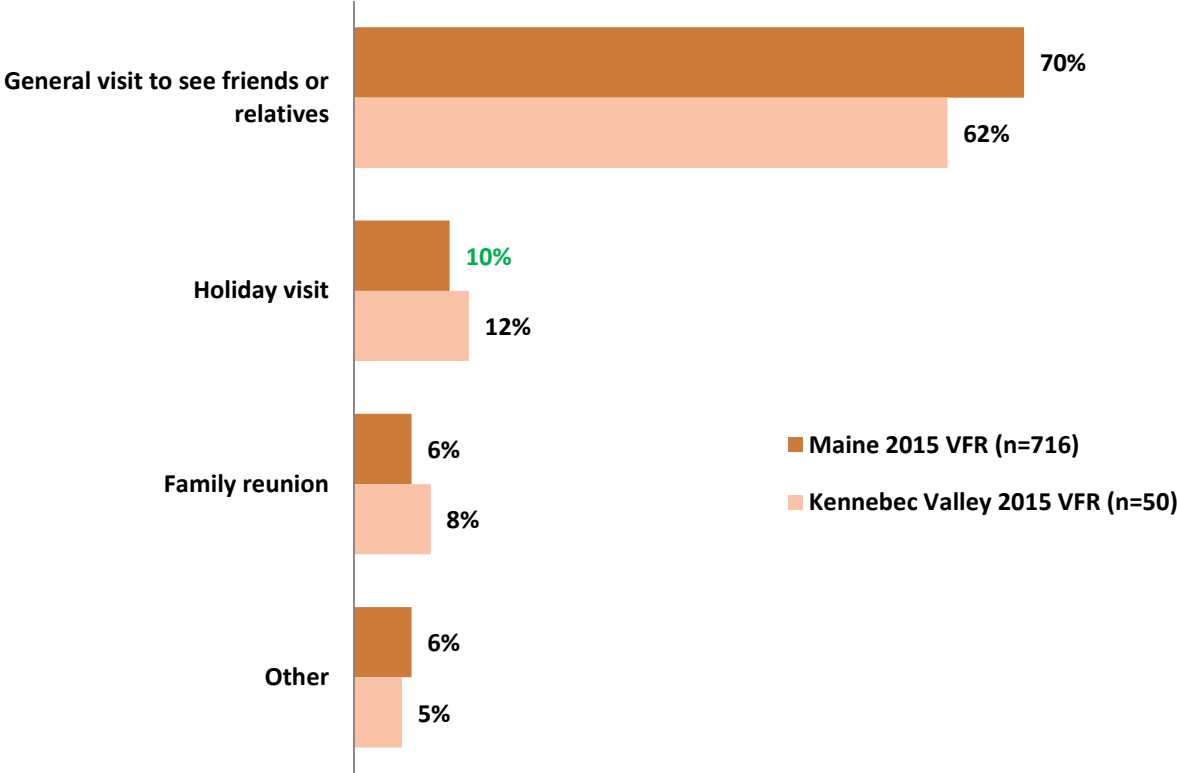
Q14. Including yourself and any children, how many people were in your immediate travel party on this trip?
Q15. How many of these people were: Children
<> indicates a significant difference between subgroups at the 95% confidence level.
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Day Visitors: *Trip Experience*



Six in ten VFR travelers to the region cite a *general visit to see friends/relatives* as the primary purpose of their VFR day trip.

Primary Purpose of Day VFR Trips



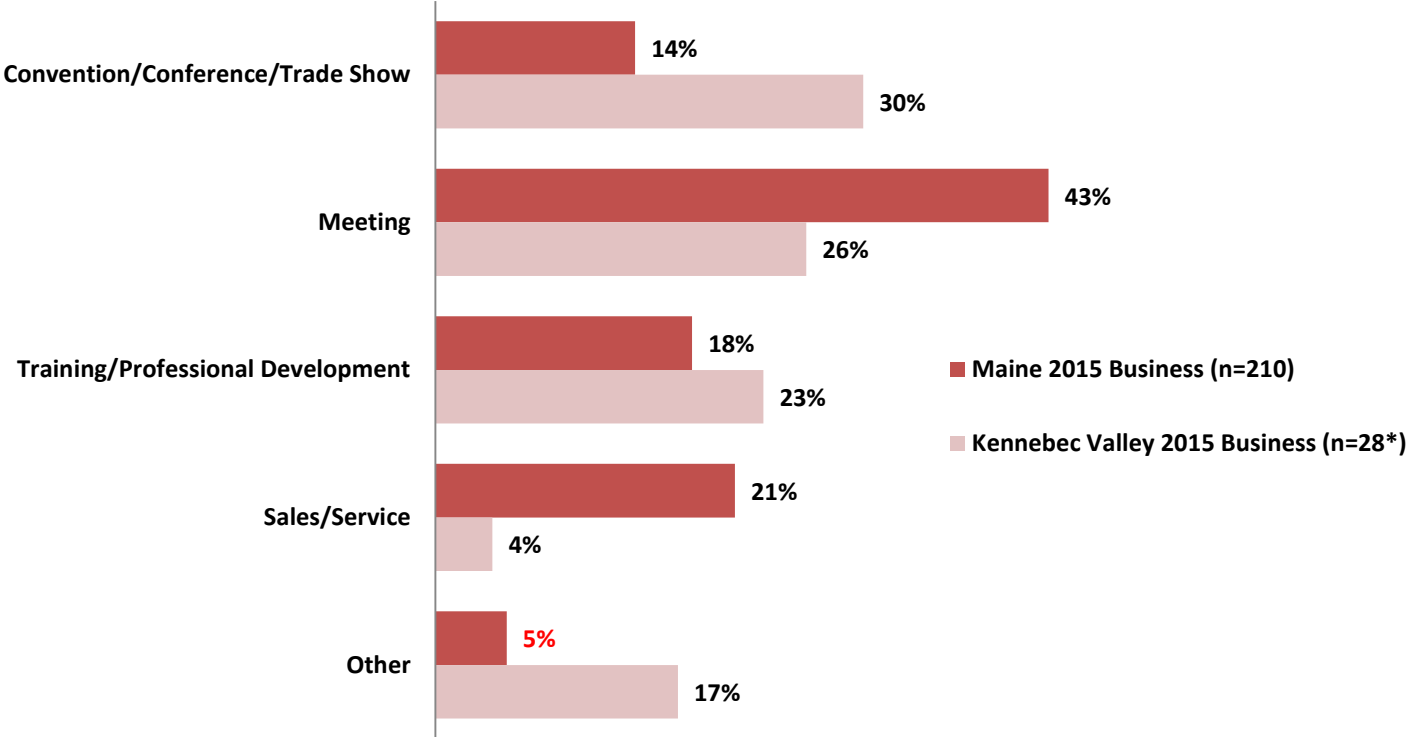
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> 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.

Almost one third of business day travelers visit the Kennebec Valley for a conference/convention/trade show.

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.

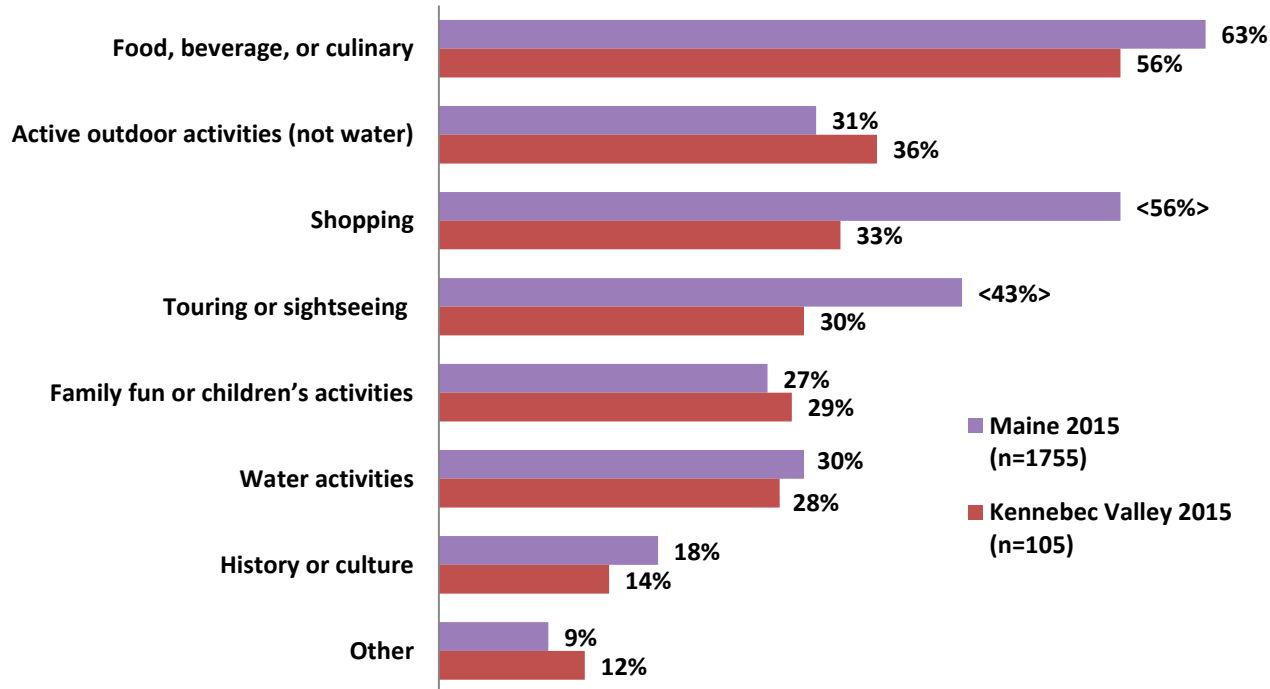
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

The most common interest area pursued by day visitors to the Kennebec Valley region is *food/beverage/culinary activities*.

- A lesser proportion of day visitors to the Kennebec Valley region are interested in *shopping* or *touring/sightseeing* as compared to day visitors to the State of Maine overall.

2015 Interest Areas



Most Important Interest Area Kennebec Valley

37%

51%

30%

31%

<76%>

28%

19%

76%

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

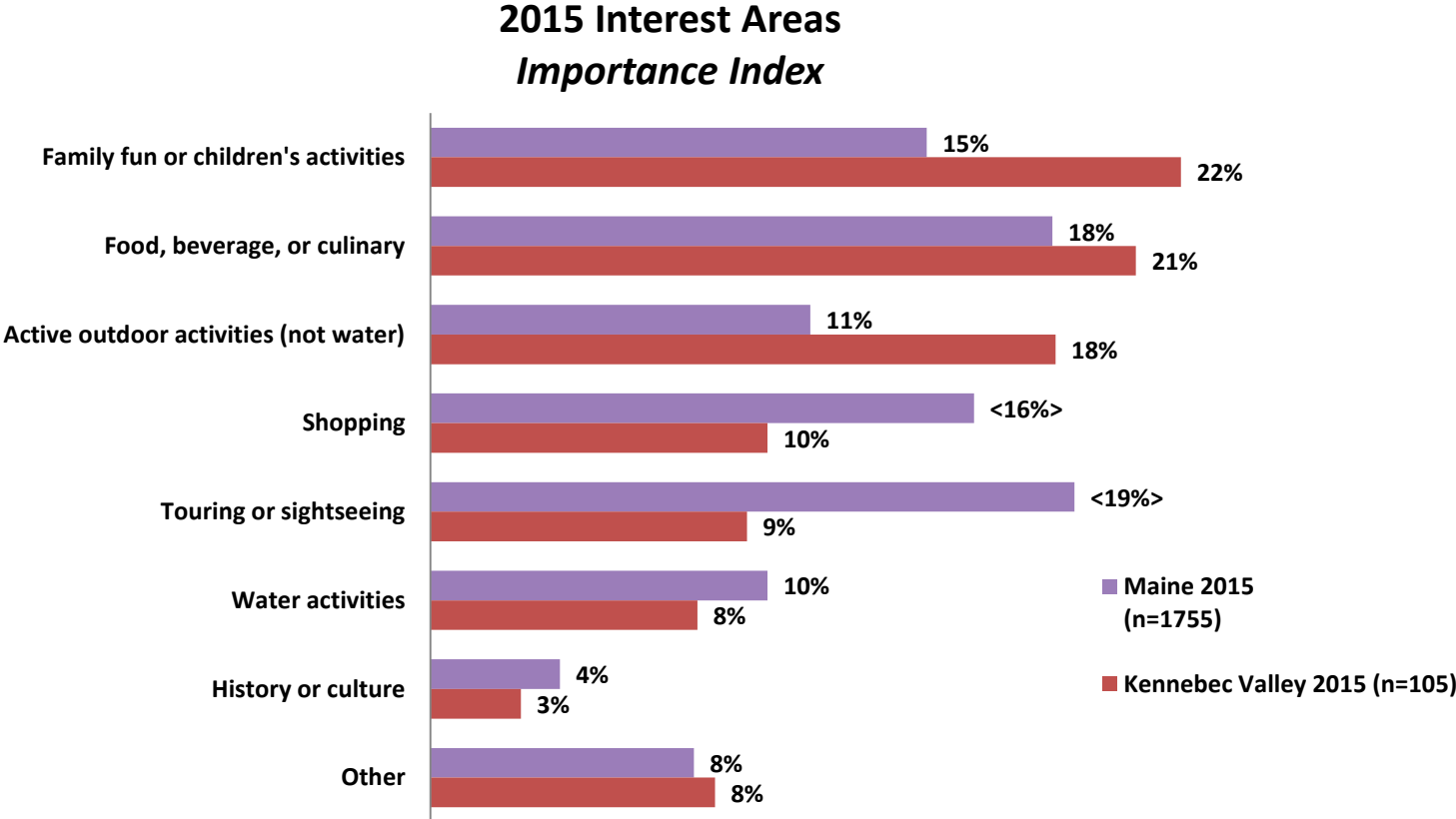
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

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

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

When analyzing both interest and importance in deciding to visit, family fun/children’s activities and food/beverage/culinary activities rank highest among day visitors to this region.

- When analyzing both interest and importance in deciding to visit, Kennebec Valley day visitors are less likely than visitors to Maine as a whole to be interested in *shopping* and *touring/sightseeing*.



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

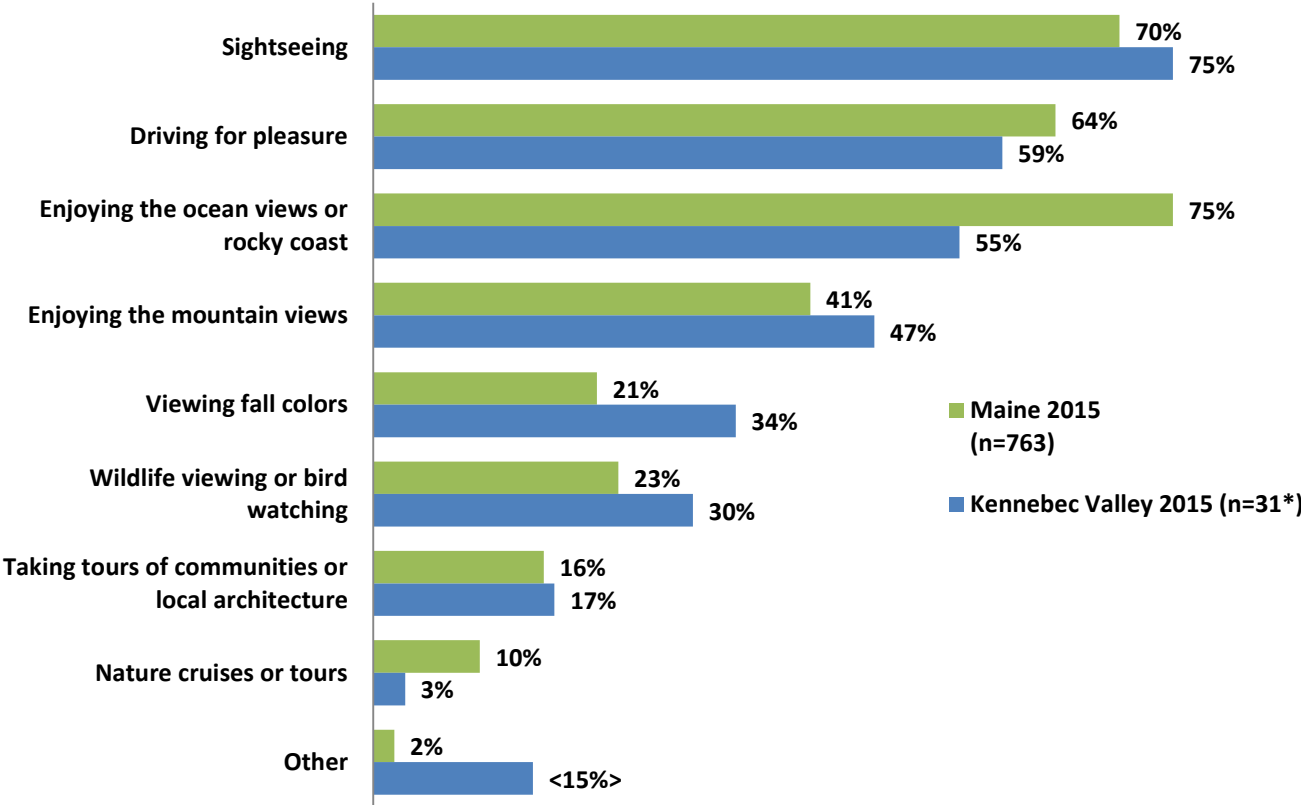
Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34
 <> indicates a significant difference between subgroups at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



General sightseeing is the most common activity among day visitors to the Kennebec Valley who are interested in touring or sightseeing.

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.

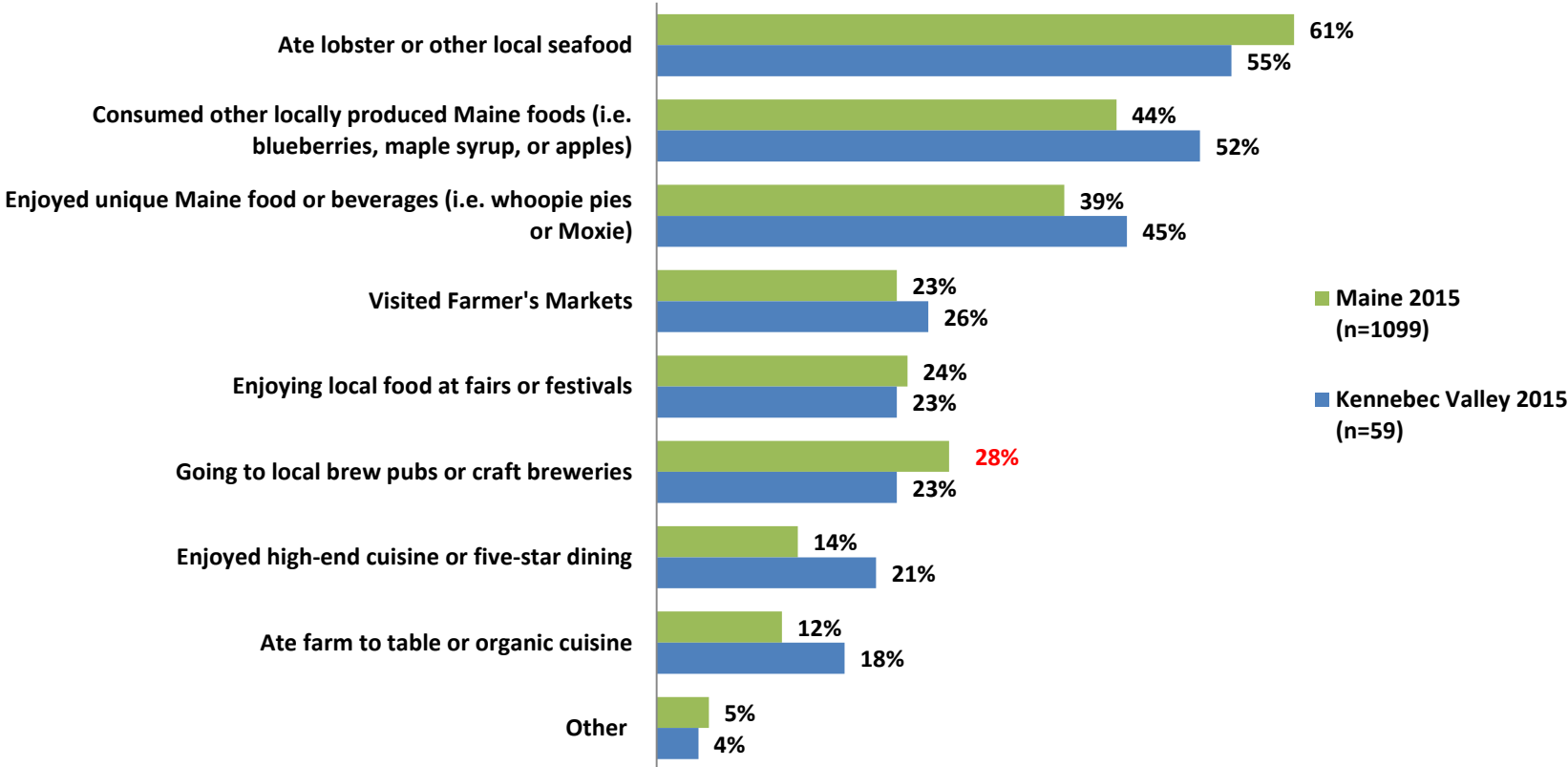
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note very small sample size.

Just over half of those interested in food/beverage/culinary activities ate lobster or other local seafood or consumed other locally produced foods while in the Kennebec Valley region.

Food, Beverage, or Culinary Activities

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



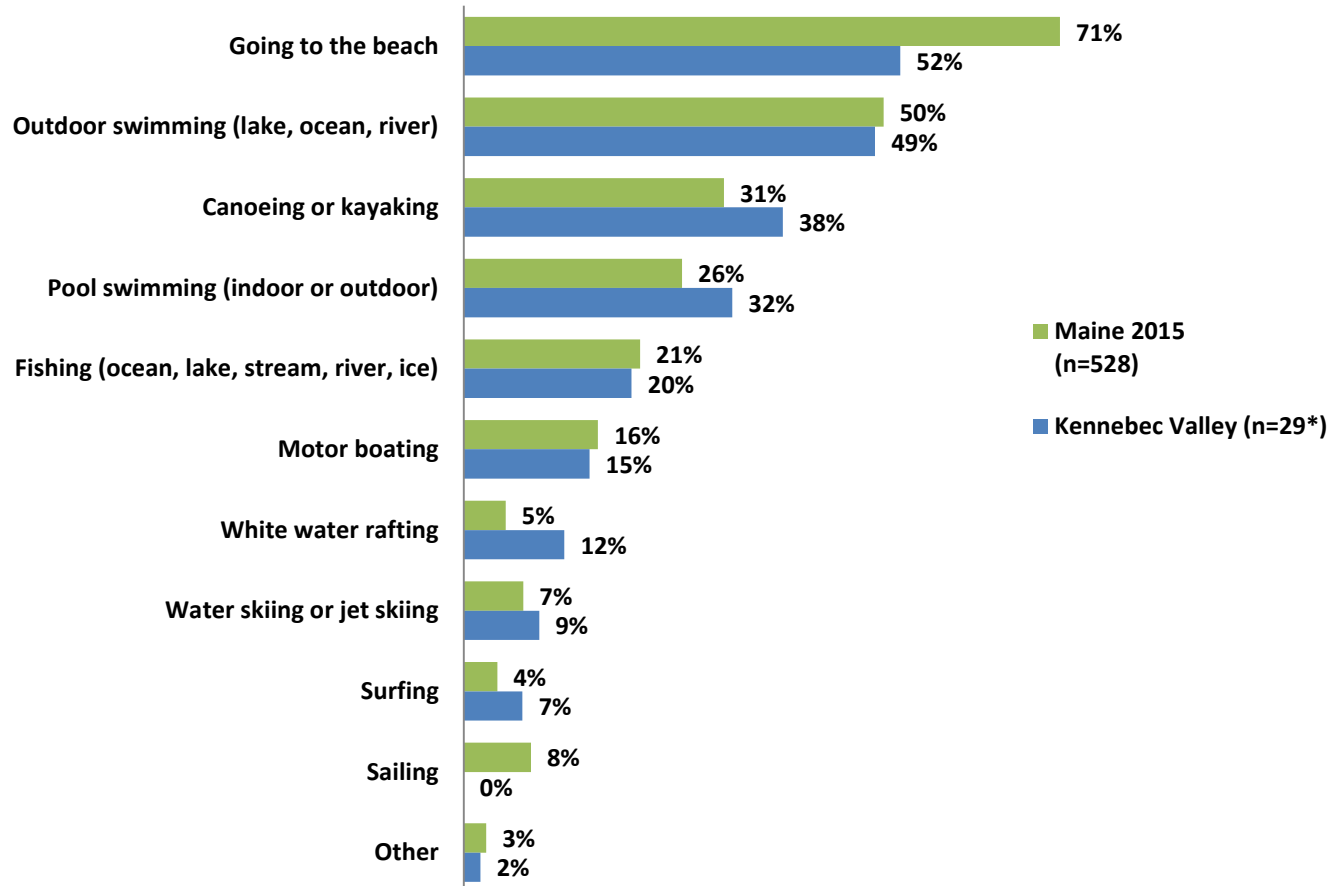
Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

Half of Kennebec Valley day visitors who are interested in water activities go to the beach or swim outdoors while visiting the Kennebec Valley.

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.

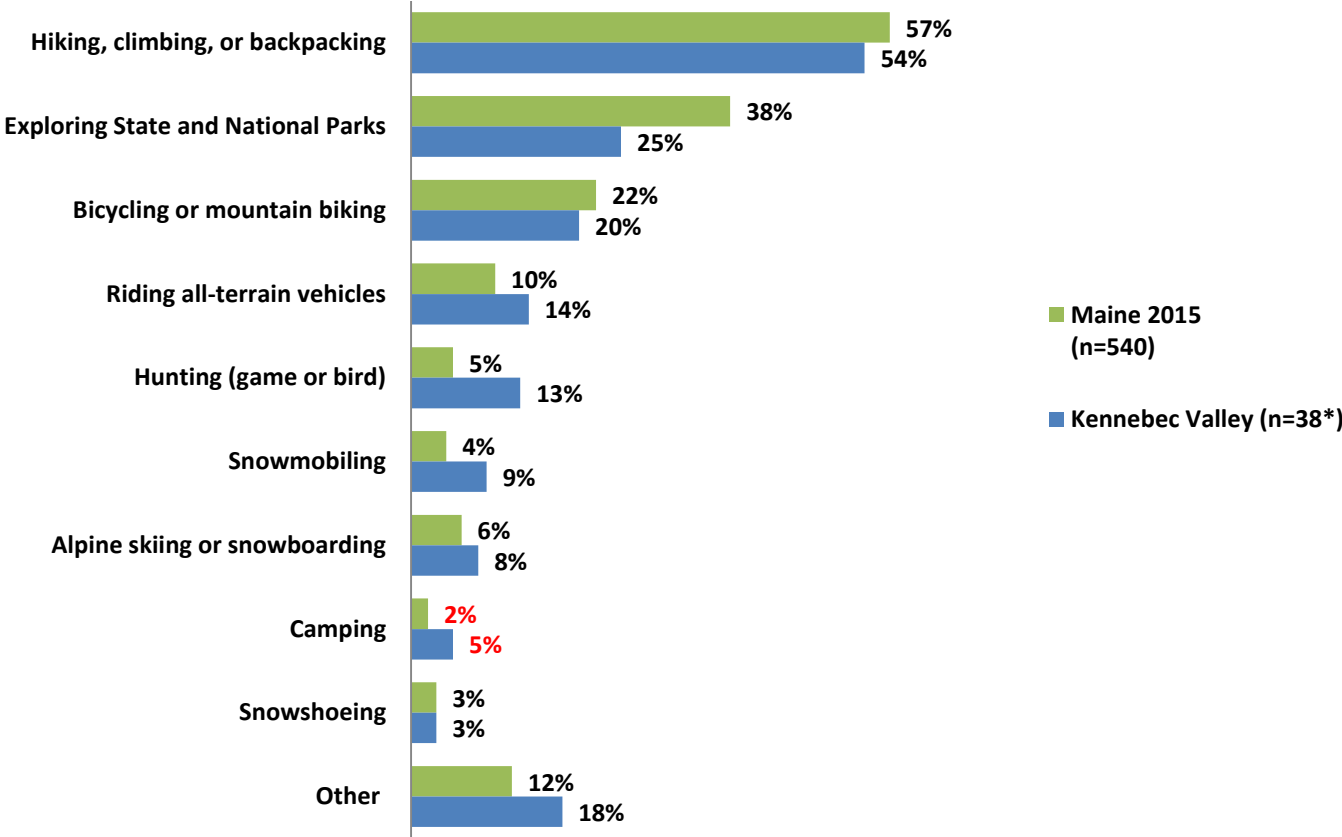
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

More than half of day visitors interested in active outdoor activities *hike, climb, or backpack while in this region.*

Active Outdoor Activities – Non-Water

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



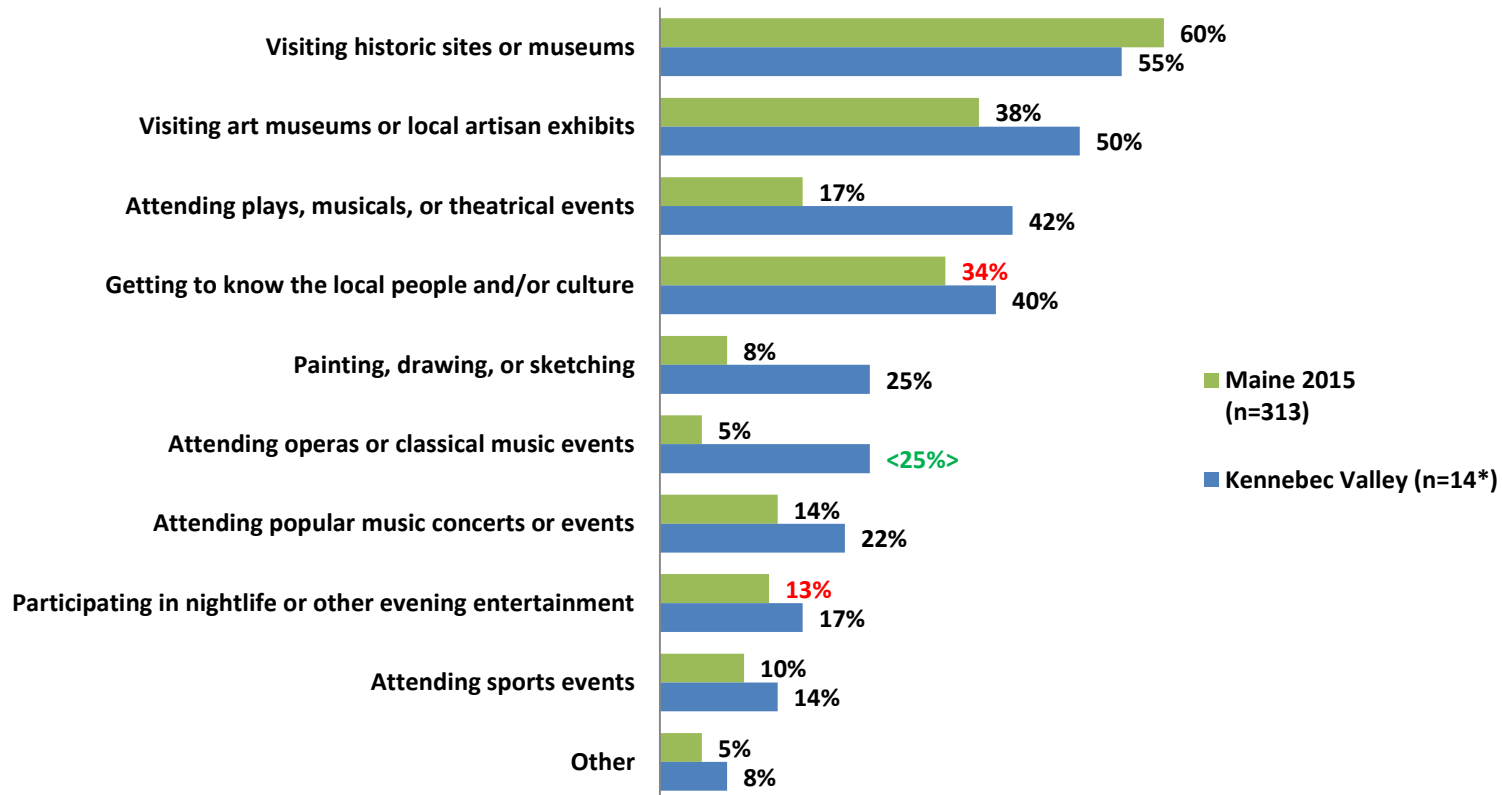
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
*Please note small sample size.

Visiting historic sites or museums is the most common history or culture activity among day visitors to the Kennebec Valley.

- A greater proportion of Kennebec Valley day visitors *attend operas or classical music events* compared to day visitors to the State of Maine overall.

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.

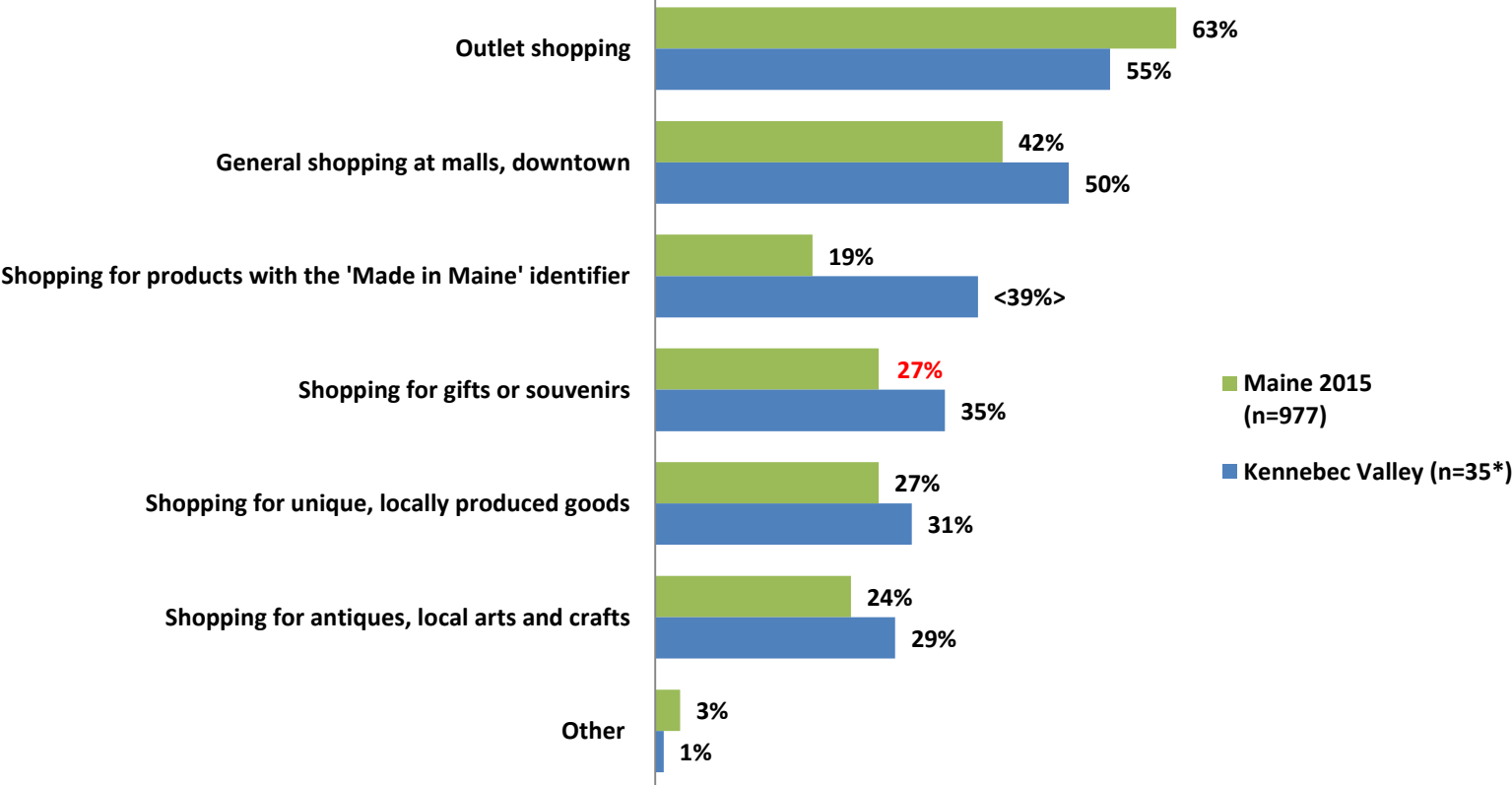
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note very small sample size.

Outlet shopping is the most popular shopping activity among day visitors to the Kennebec Valley region.

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.

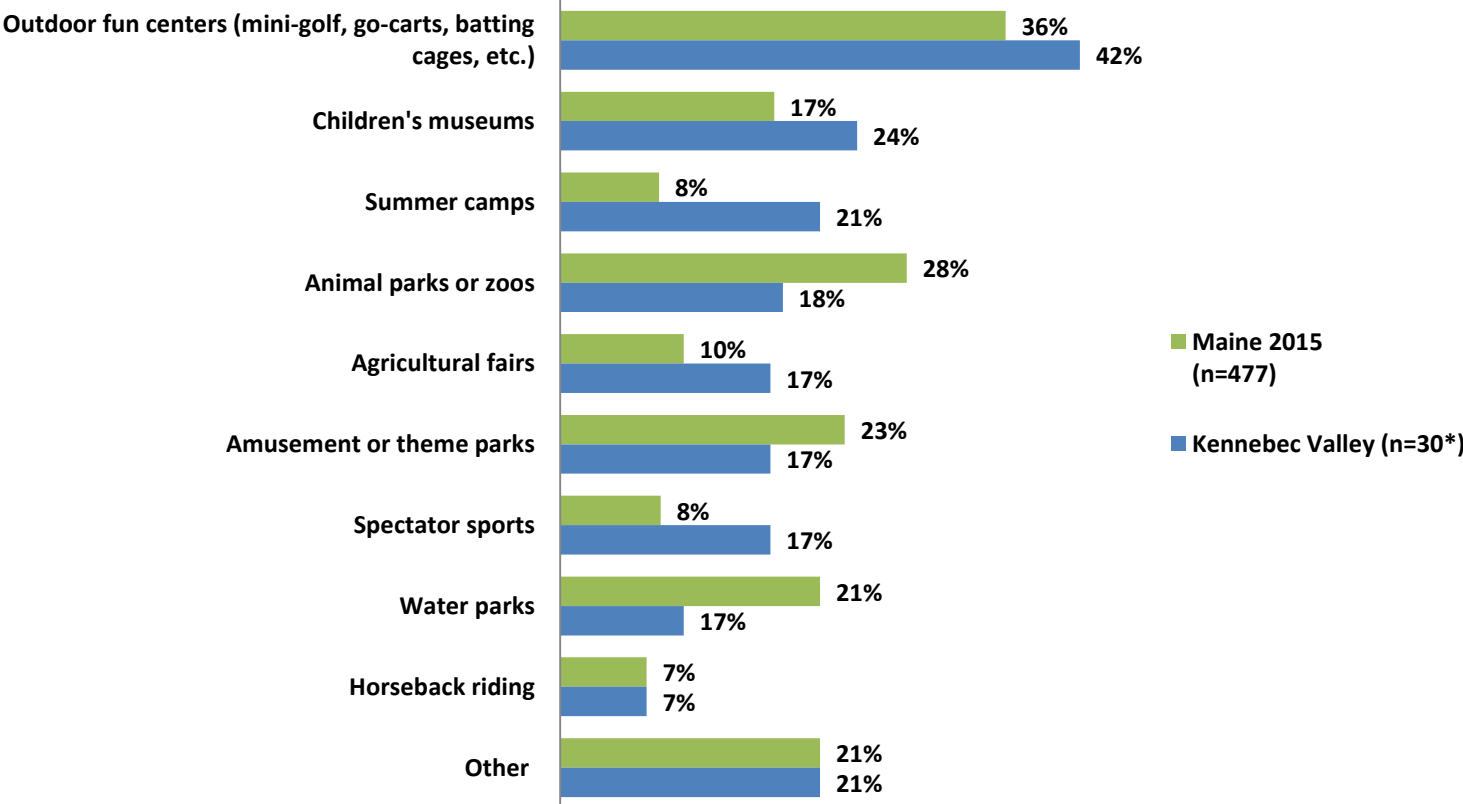
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

Kennebec Valley day visitors interested in family fun/children’s activities are most likely to visit *outdoor fun centers* while in the area.

Family Fun/Children’s Activities

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



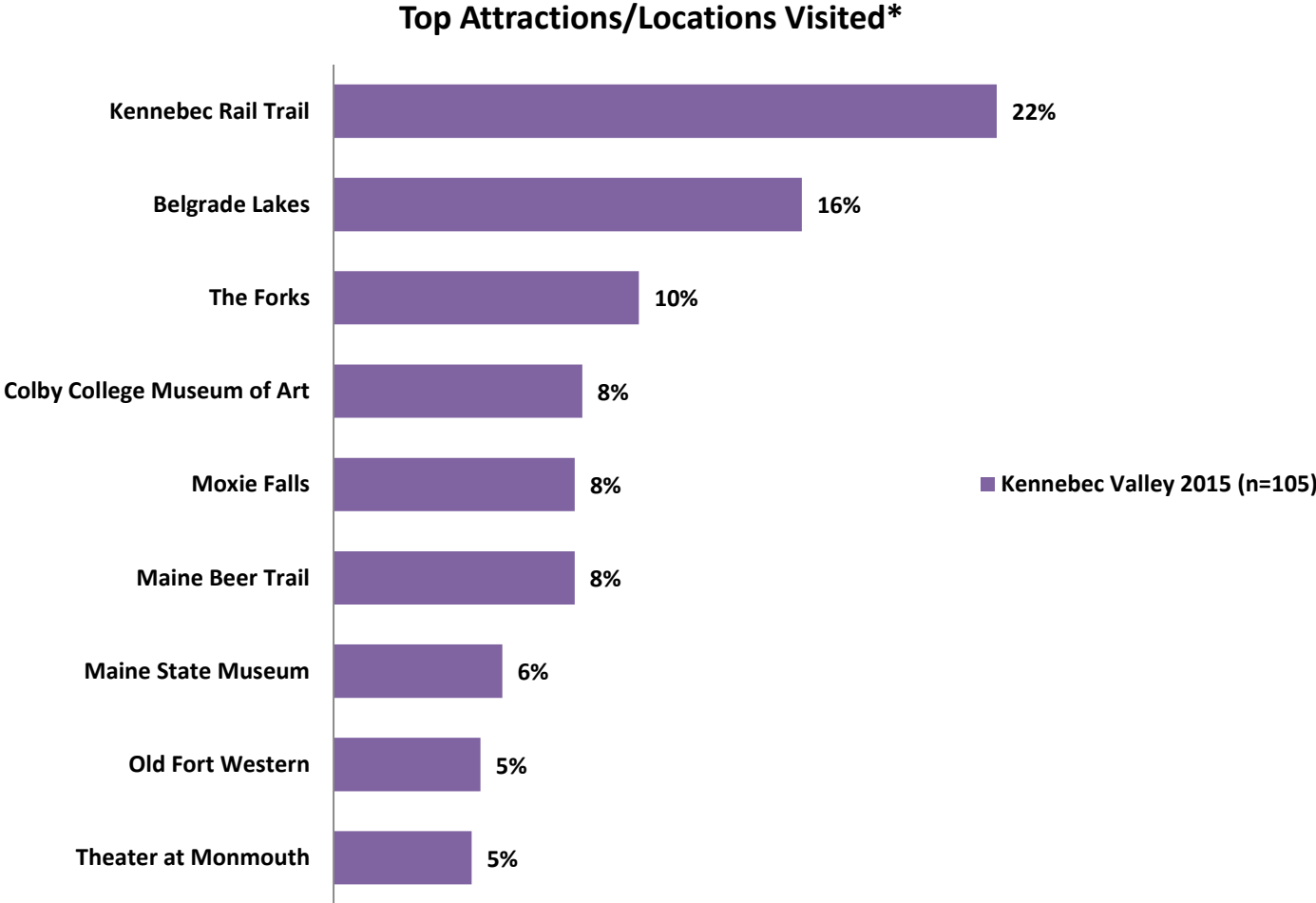
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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.

One in five day visitors to the Kennebec Valley region visits the Kennebec Rail Trail.



* Does not include response options selected by fewer than 5% of respondents.

Comparison of *Kennebec Valley* Visitors to Maine Visitors



Comparisons: Region vs. State

- Visitors to the Kennebec Valley tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in visitor origin, their reasons for traveling, and the activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the outdoor and nature-oriented environment available in the Kennebec Valley region.
- Highlights – Kennebec Valley region vs. State visitors:

Visitor Origin

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

Travel Party

- **A greater proportion** of overnight visitors **traveling with children**.

Comparisons: Region vs. State

- Highlights Continued:

Trip Interest Areas – Overnight and Day Visitors

- Less likely to want to pursue **shopping** while visiting.

Trip Interest Areas – Overnight Visitors

- Less likely to want to pursue **food/beverage/culinary activities** while visiting.

Trip Interest Areas – Day Visitors

- Less likely to want to pursue **touring/sightseeing activities** while visiting.

Comparisons: Region vs. State

- Highlights Continued:

Maine Trip Interests and Importance (Importance Index)

Overnight Visitors

- More likely to place importance on **family fun or children's activities**.
- Less likely to place importance on **touring/sightseeing activities**.

Day Visitors

- Less likely to place importance on:
 - Shopping
 - Touring/sightseeing

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More** likely to be:
 - White water rafting
- **Less** likely to:
 - Enjoy the ocean views or rocky coast
 - Eat lobster or other local seafood
 - Fish (ocean, lake, stream, river, ice)
 - Go to amusement or theme parks

Trip Activities – Day Visitors

- **More** likely to:
 - Go shopping for products with the “Made in Maine” identifier
 - Attend operas or classical music events



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