



Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report

Regional Insights: Kennebec Valley



Prepared by



April 2017

Table of Contents

| | |
|---------------------------------------------------------------------|----|
| Research Objectives and Methodology | 3 |
| Overnight Visitors: | |
| Traveler Description | 7 |
| Trip Experience | 12 |
| Day Visitors: | |
| Traveler Description | 26 |
| Trip Experience | 31 |
| Comparison of Kennebec Valley Visitors to All Maine Visitors | 44 |

Research Objectives and Methodology

Research Objectives and Methodology

Three distinct online surveys are used to accomplish the five primary goals of the State of Maine’s visitor tracking research.

| Research Objectives | Survey Instruments | | |
|------------------------------------------------------------------------|--------------------|-------------------|-------------|
| | National Omnibus | Overnight Visitor | Day Visitor |
| Identify Maine’s share of the U.S. travel market | ✓ | | |
| Estimate the number of visitors who come to Maine | ✓ | ✓ | ✓ |
| Provide a profile of Maine visitors | | ✓ | ✓ |
| Estimate the amount of spending devoted to tourism in Maine | | ✓ | ✓ |
| Determine the Maine traveler’s level of satisfaction and view of Maine | | ✓ | ✓ |

Description of Survey Instruments

National Travel Survey

- Nationally representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine’s borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

Research Objectives and Methodology

- Survey results were collected during calendar year 2016, for travel to Maine occurring between December 2015 and November 2016. The number of respondents participating in each survey statewide is:

| Research Component | 2016 Completed Surveys |
|--------------------------|------------------------|
| Overnight Visitor Survey | 2,909 |
| Day Visitor Survey | 1,762 |
| National Travel Survey | 21,910 |

Research Objectives and Methodology

- The following report summarizes results among visitors to the **Kennebec Valley** tourism region during 2016, including:
 - 190 overnight visitors, and
 - 142 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 < >. *(A statistically significant difference means the observed difference is more than would be expected by chance 95 out of 100 times.)*
- Statistically significant differences between 2015 and 2016 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 40 years old, on average, and have annual household incomes just under \$98,000. Two-thirds have at least a college degree or are employed full-time. Six in ten are married.
- Overnight visitors to the Kennebec Valley region tend to be younger than visitors to the State overall.

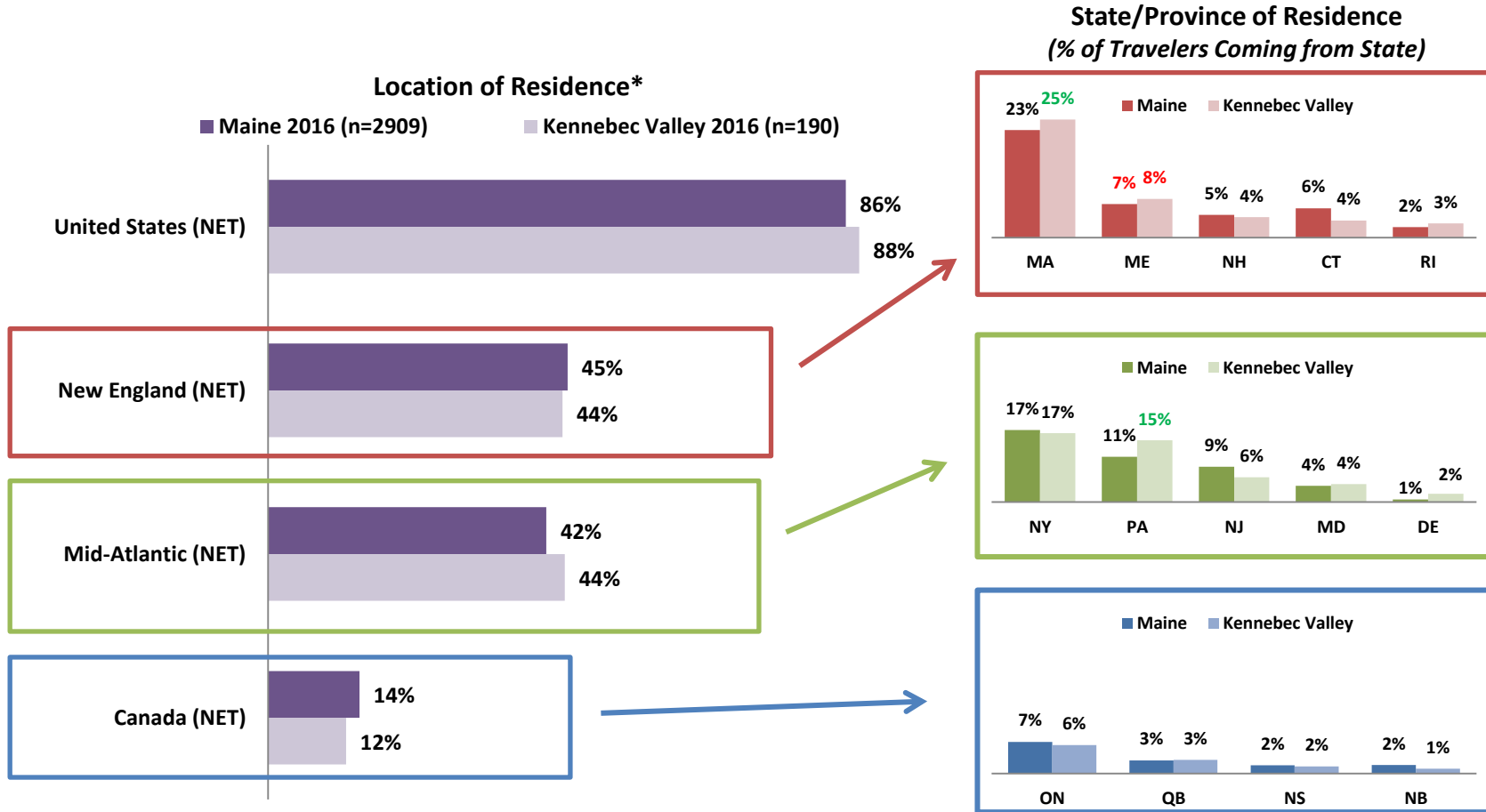
| Overnight Visitors | Maine 2016 (n=2909) | Kennebec Valley 2016 (n=190) |
|--------------------------|---------------------------|------------------------------------|
| Age: | | |
| < 35 | 34% | 42% |
| 35 - 44 | 22% | 23% |
| 45 - 54 | 18% | 17% |
| 55 + | <26%> | 19% |
| Mean Age (Years) | <42.8> | 39.4 |
| Income: | | |
| < \$50,000 | 20% | 25% |
| \$50,000 - \$99,999 | 42% | 34% |
| \$100,000 + | 39% | 41% |
| Mean Income | \$98,700 | \$97,500 |
| Female | 60% | 57% |
| College Degree or Higher | 66% | 64% |
| Married | 56% | 59% |
| Employed Full-Time | 66% | 69% |

<> 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.

- The proportion of visitors to the Kennebec Valley region arriving from Massachusetts or Pennsylvania increased from 2015 to 2016.



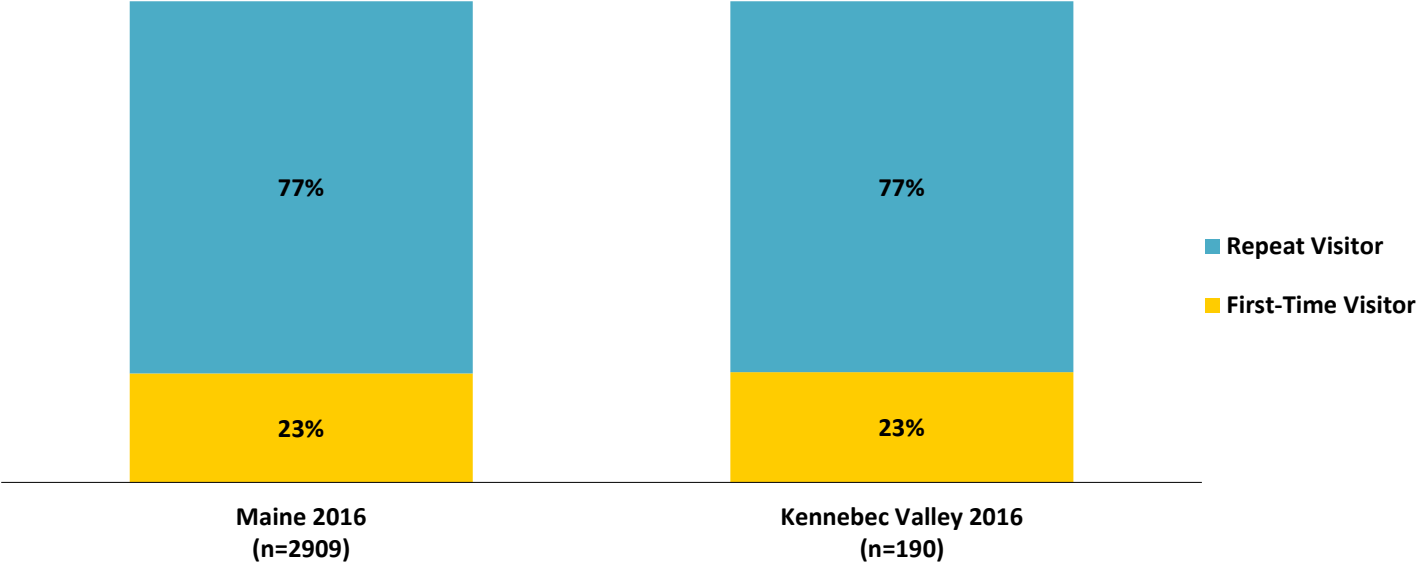
*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

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

Repeat vs. First-Time Visitors



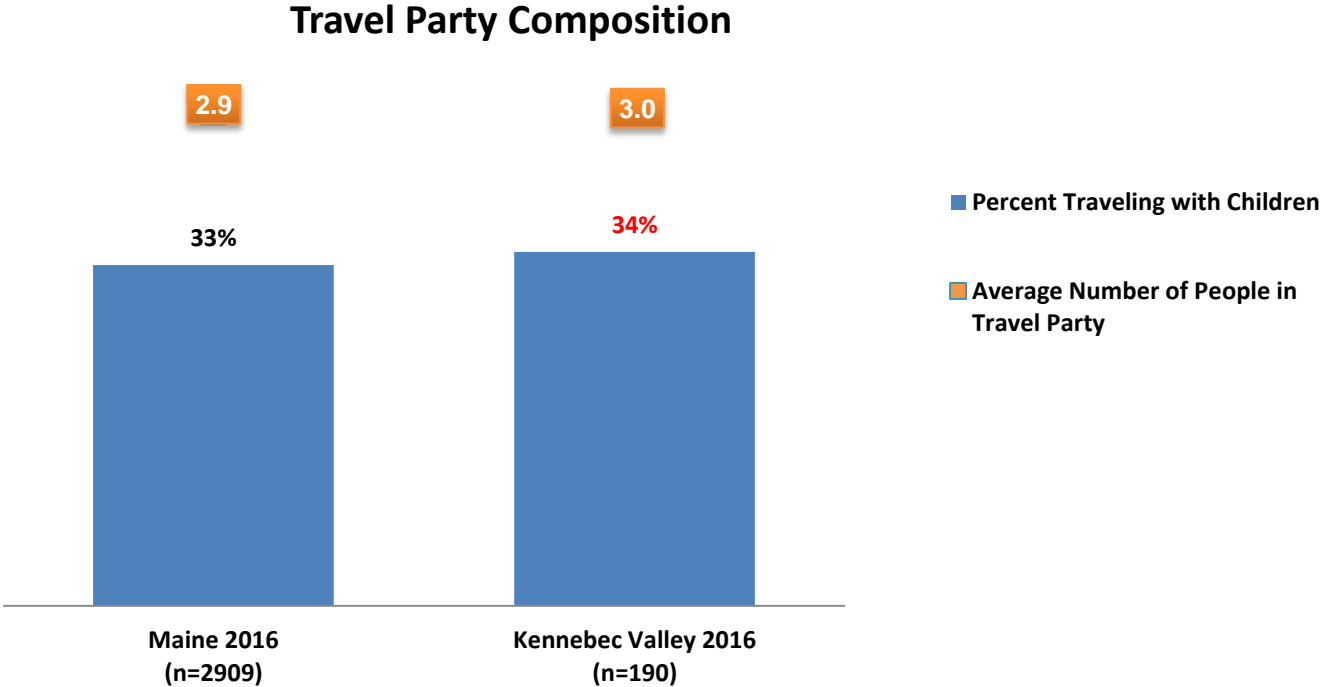
Q11. Was this your first visit in Maine?

<> 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.

One-third of overnight visitors to the Kennebec Valley are traveling with children.

- The proportion of Kennebec Valley overnight visitors traveling with children has decreased between 2015 and 2016 (51% versus 34%).



Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q22. How many of these people were: Children?

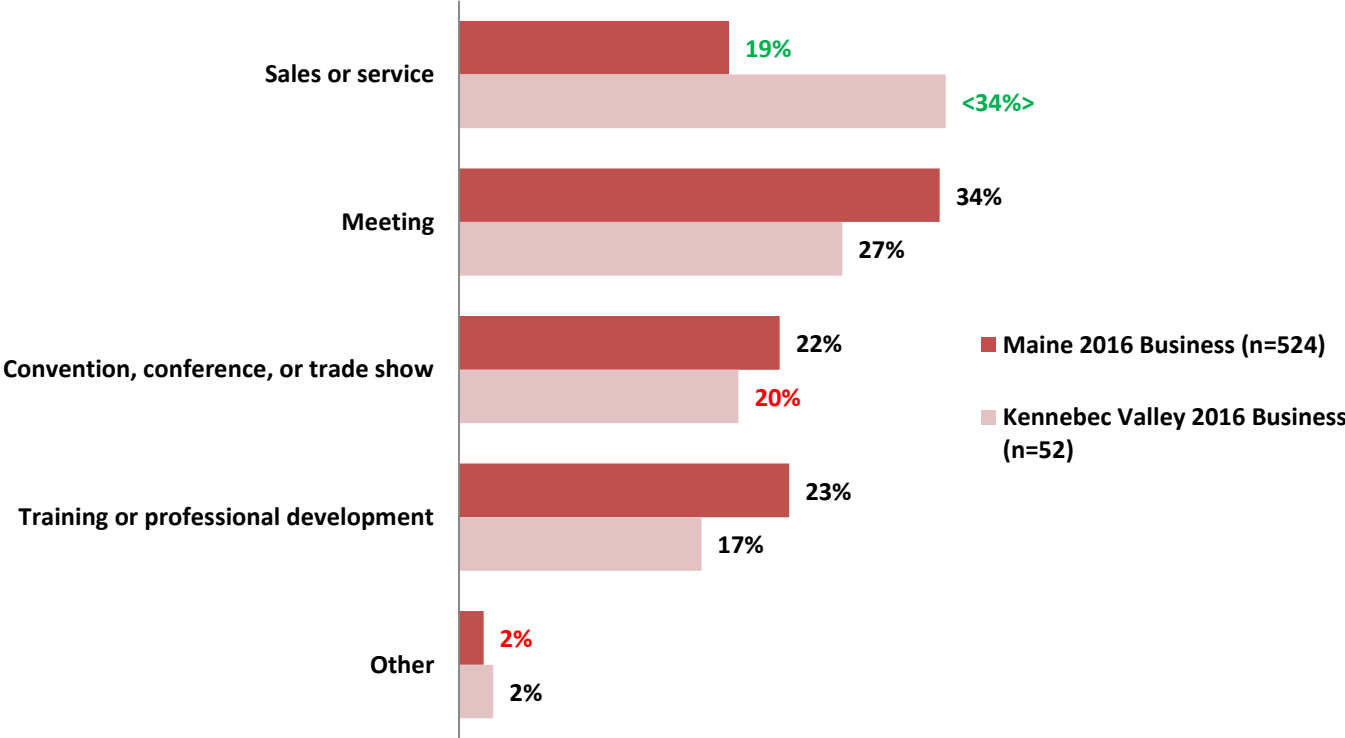
<> indicates a significant difference between subgroups at the 95% confidence level.

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

One-third of overnight business travelers to the region cite *sales or service* as the primary purpose of their trip.

Primary Purpose of Overnight Business Trips



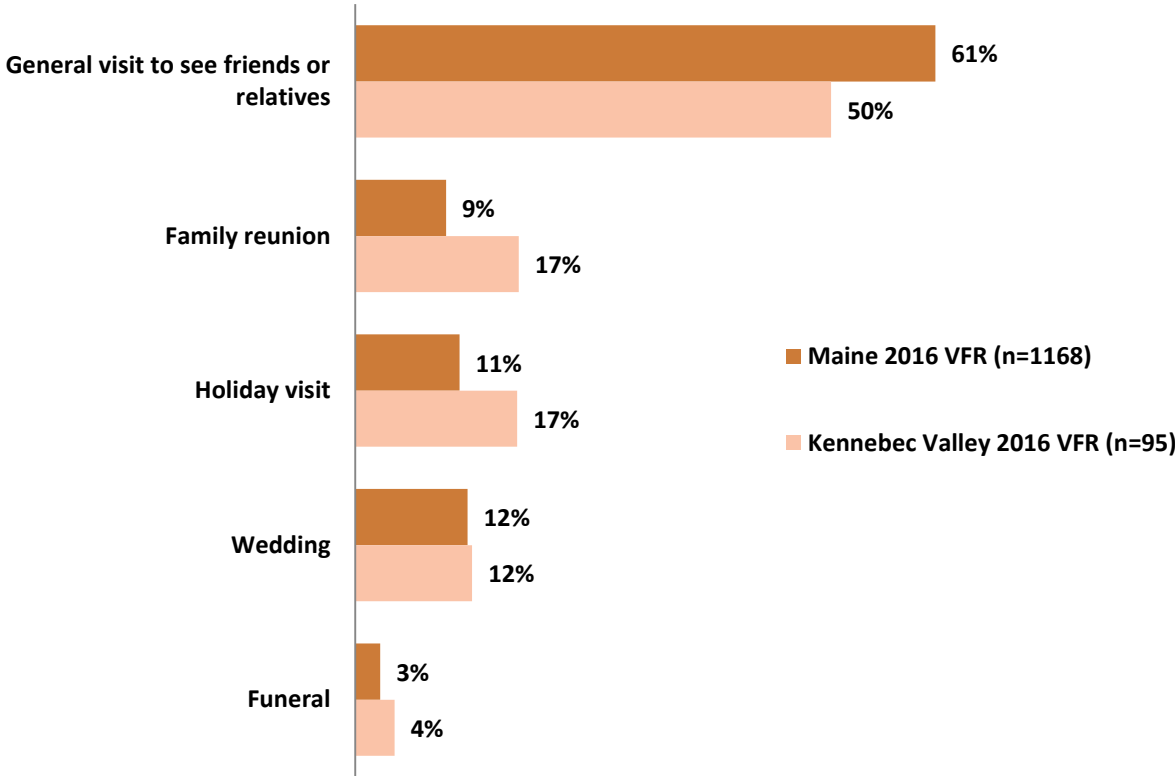
Q8. What was the primary purpose of your most recent business trip in Maine?

<> 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.

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?

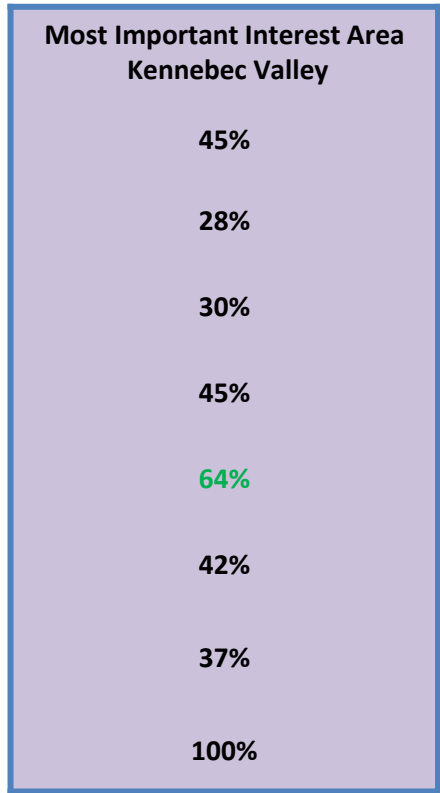
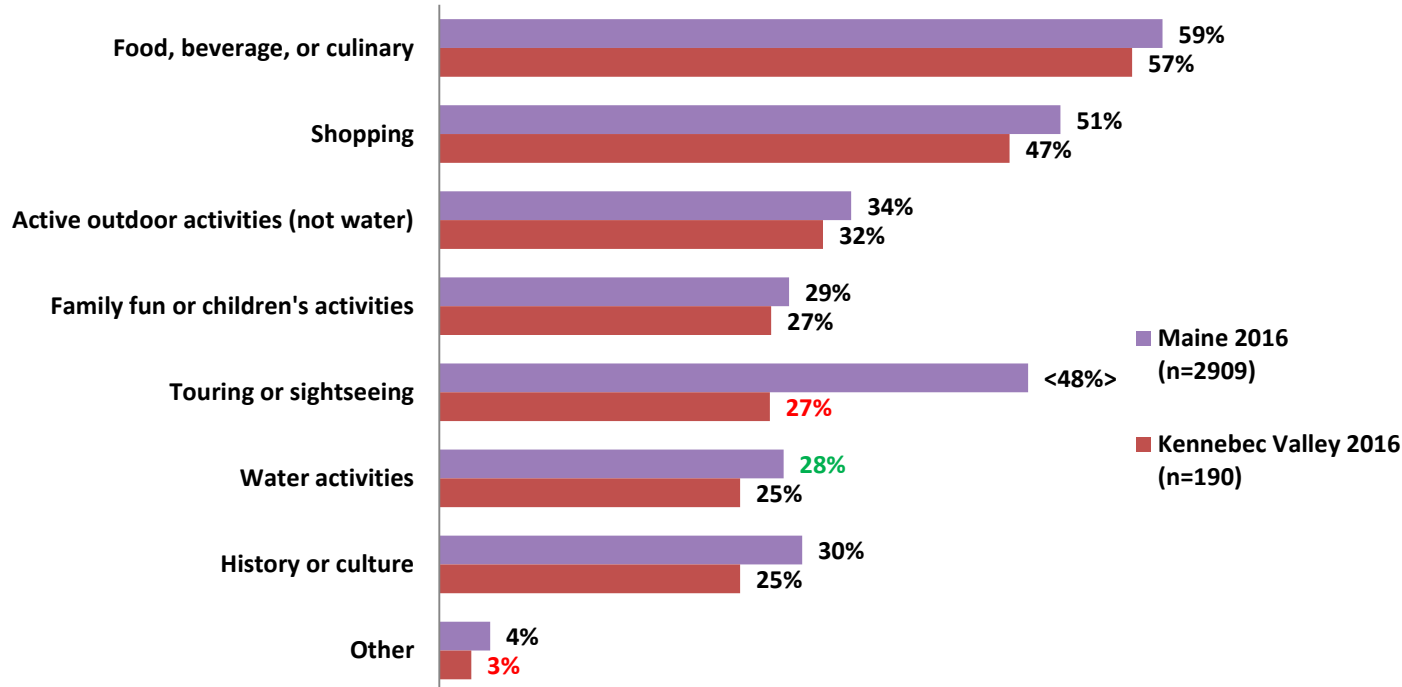
<> indicates a significant difference between subgroups at the 95% confidence level.

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

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

- Kennebec Valley visitors are less likely to be interested in *touring/sightseeing* activities as compared to overnight visitors to the State of Maine overall.

2016 Interest Areas



Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

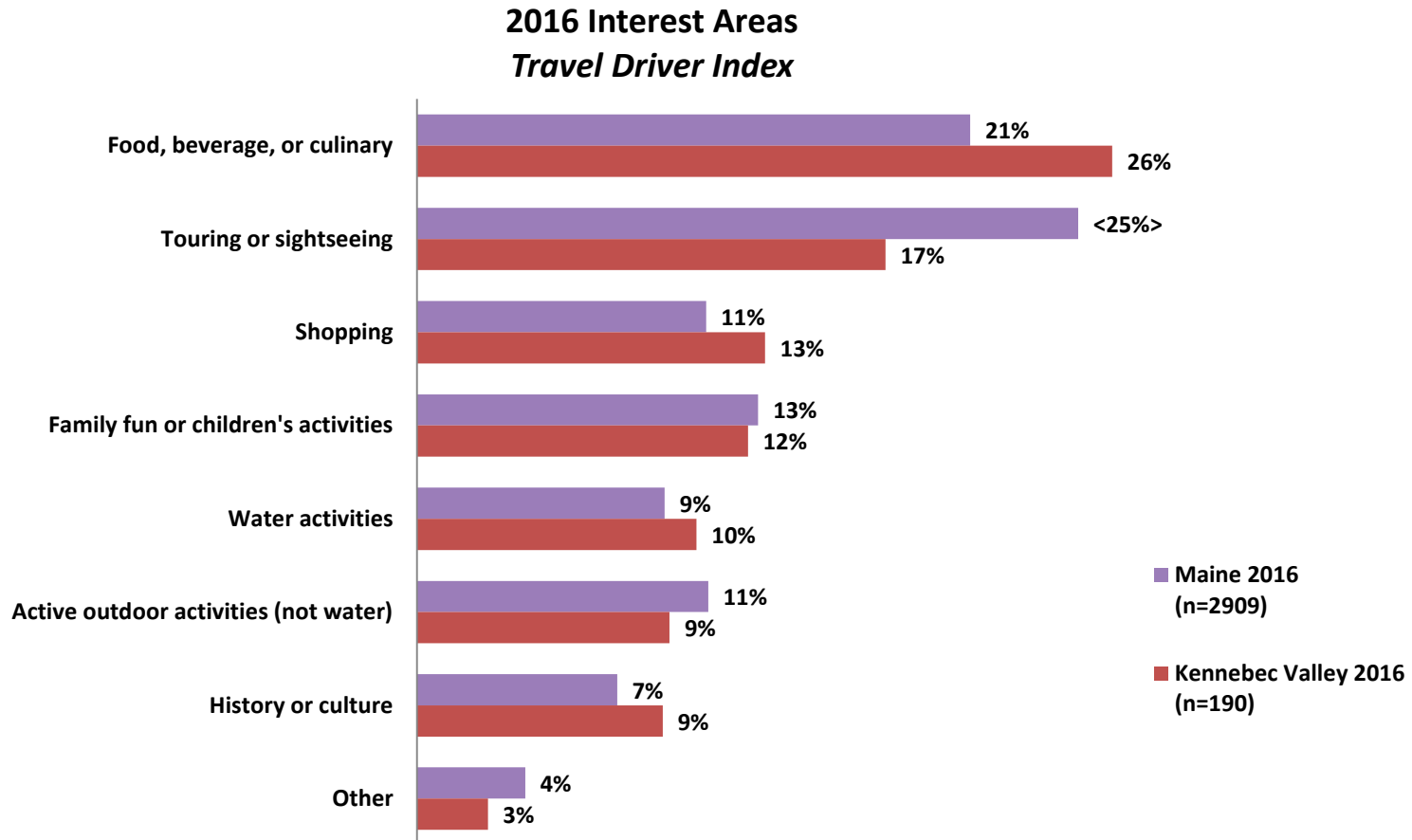
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

<> 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.

When considering both interest and importance, *food/beverage/culinary* activities rank highest among overnight visitors to this region.

- When looking at both interest and importance in deciding to visit, Kennebec Valley overnight visitors are less likely than visitors to Maine as a whole to place importance on *touring/sightseeing* activities.



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q33. 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. 16

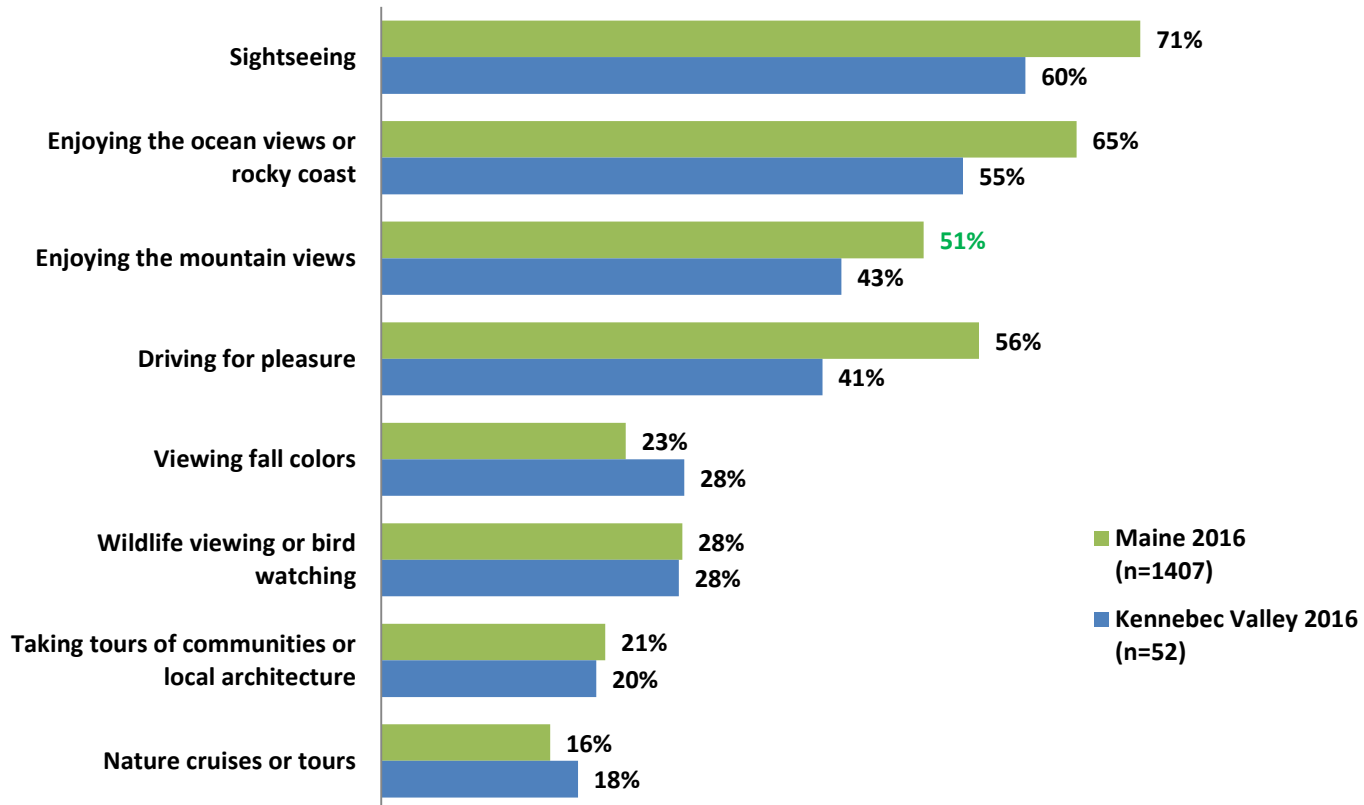
<> indicates a significant difference between subgroups at the 95% confidence level.

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 touring/sightseeing activity among overnight visitors to this region.

Touring or Sightseeing Activities

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



Q34. 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.

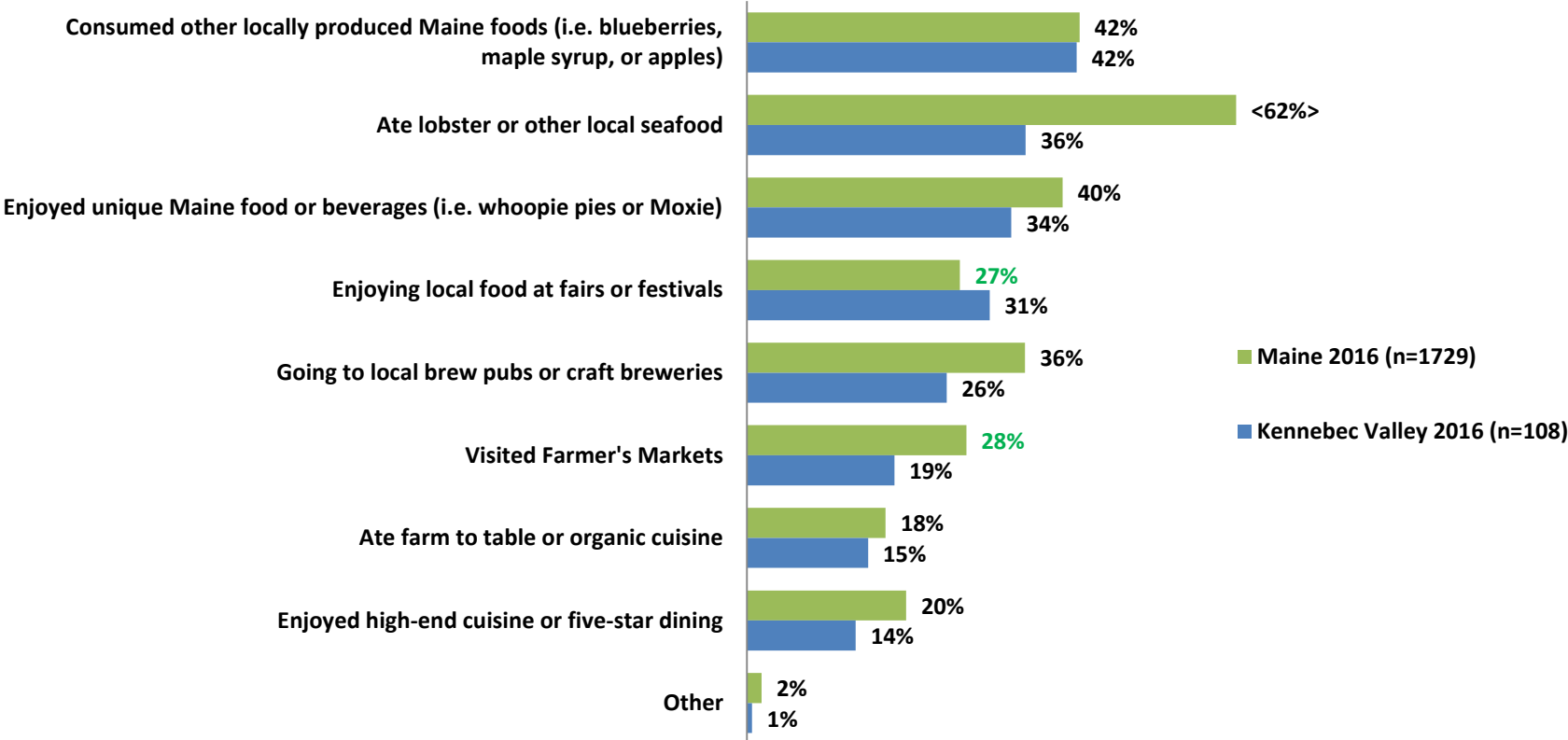
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Consuming locally produced Maine foods is the most common activity among overnight visitors to the Kennebec Valley 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 their Maine trip

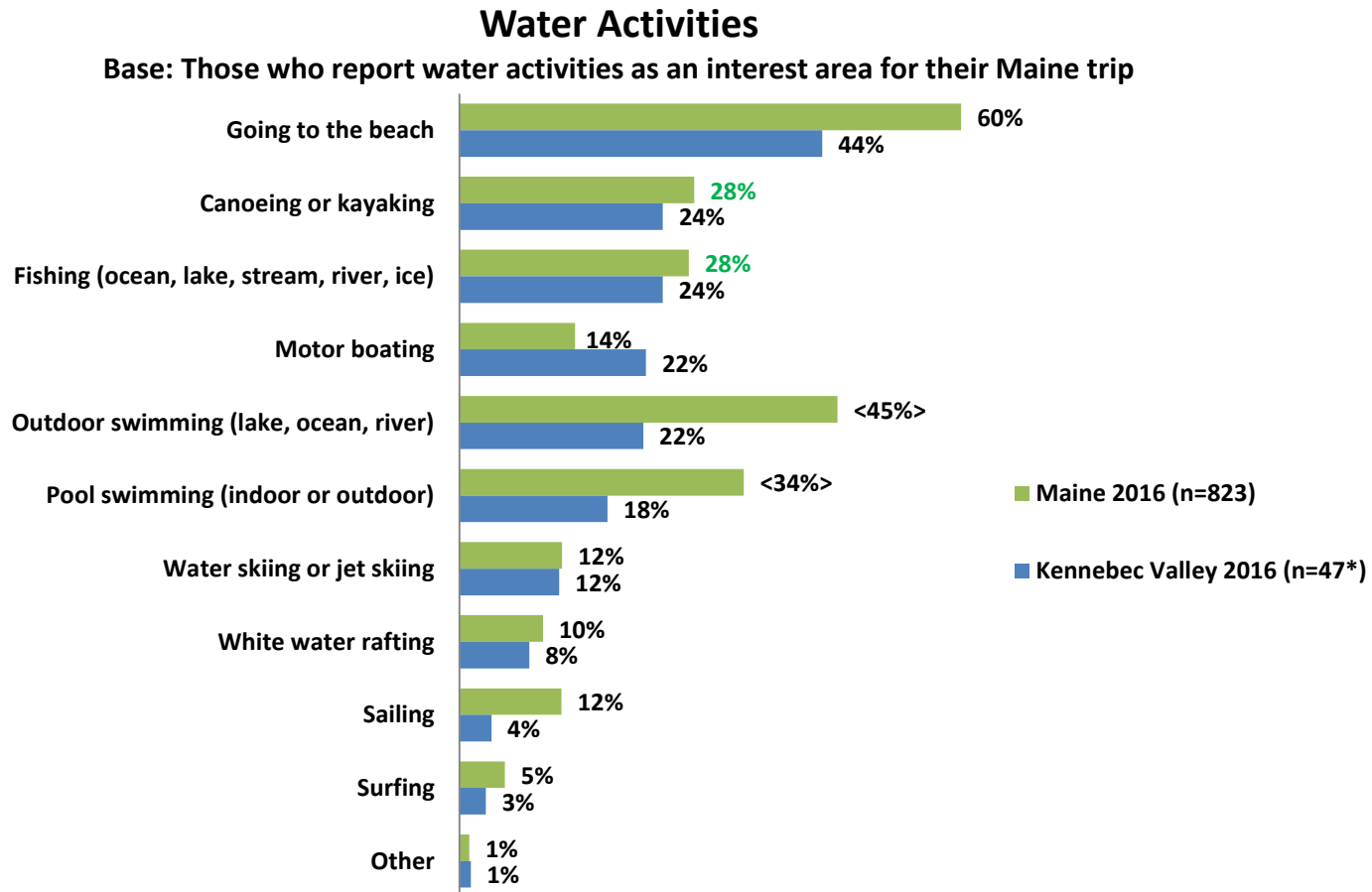


Q34. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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.

Going to the beach is the most common water activity pursued by overnight visitors to this region.

- A lesser proportion of Kennebec Valley visitors go *swimming (outdoors or in a pool)* as compared to overnight visitors to the State of Maine overall.



Q34. 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.

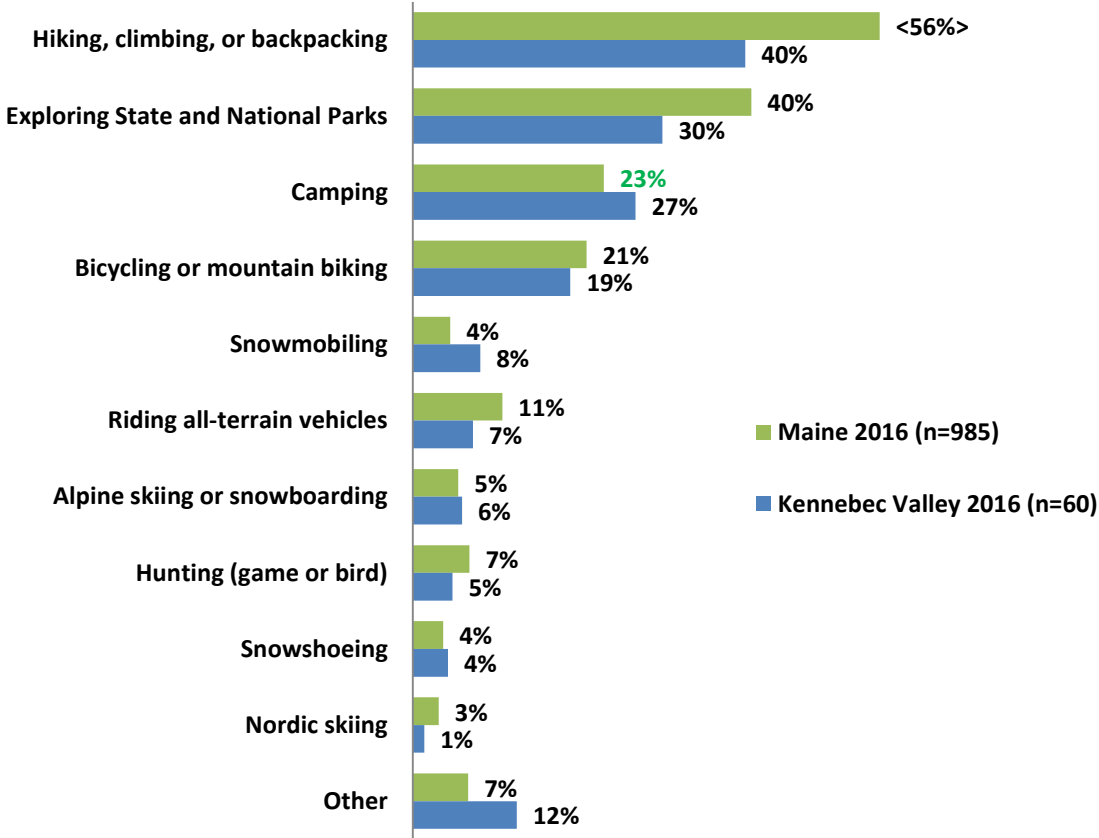
*Please note small sample size. Use caution when interpreting results.

Hiking/climbing/backpacking is the most common active outdoor activity among the region’s overnight visitors.

- Although *hiking/climbing/backpacking* is the most popular active outdoor activity among Kennebec Valley visitors, this activity is less popular among this region’s overnight visitors than it is among overnight visitors to the State of Maine overall.

Active Outdoor Activities – Non-Water

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



Q34. 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.

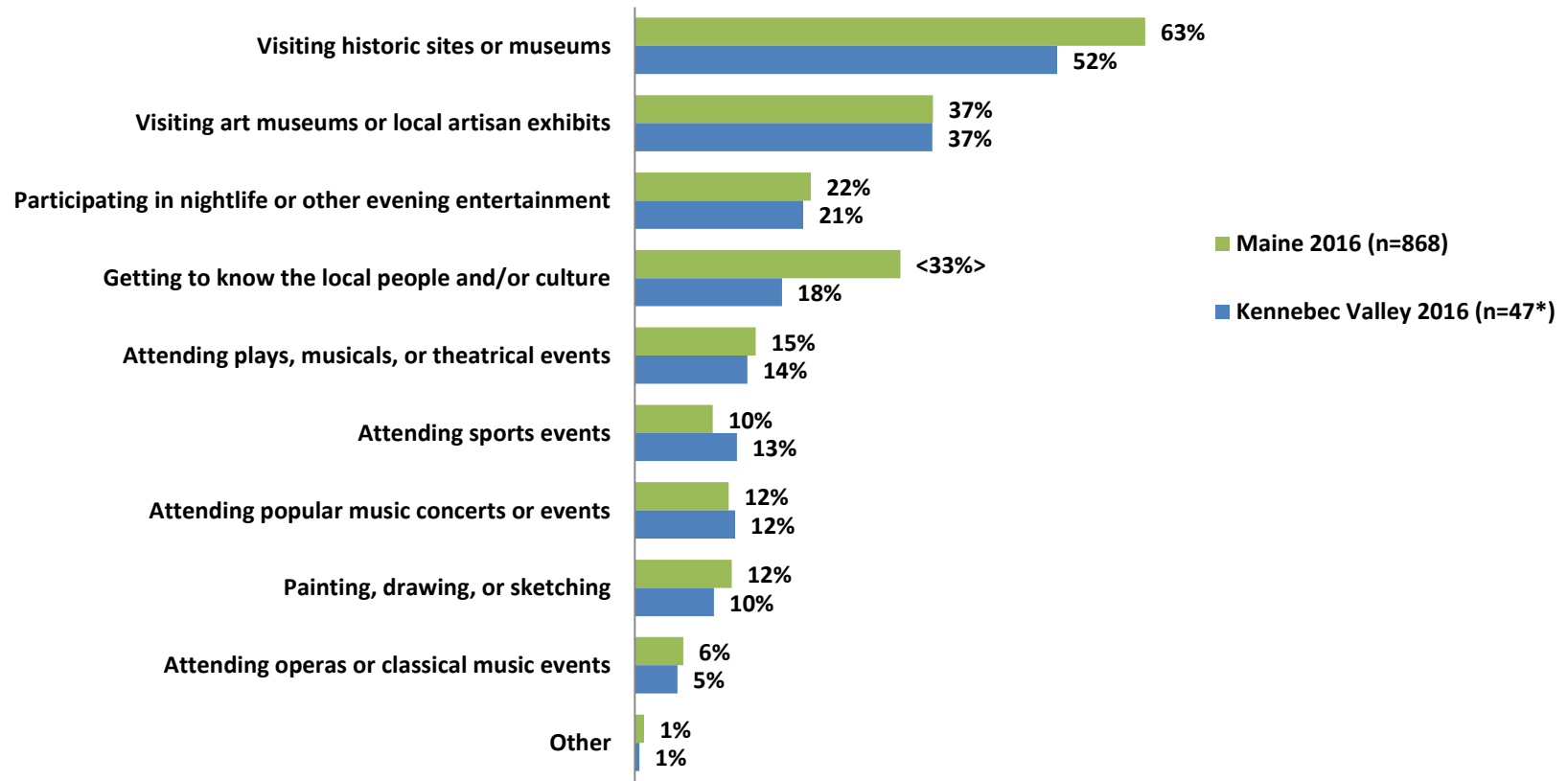
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Compared to overnight visitors to Maine overall, visitors to the Kennebec Valley region are less likely to spend time *getting to know the local people and/or culture*.

History or Culture Activities

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



Q34. 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.

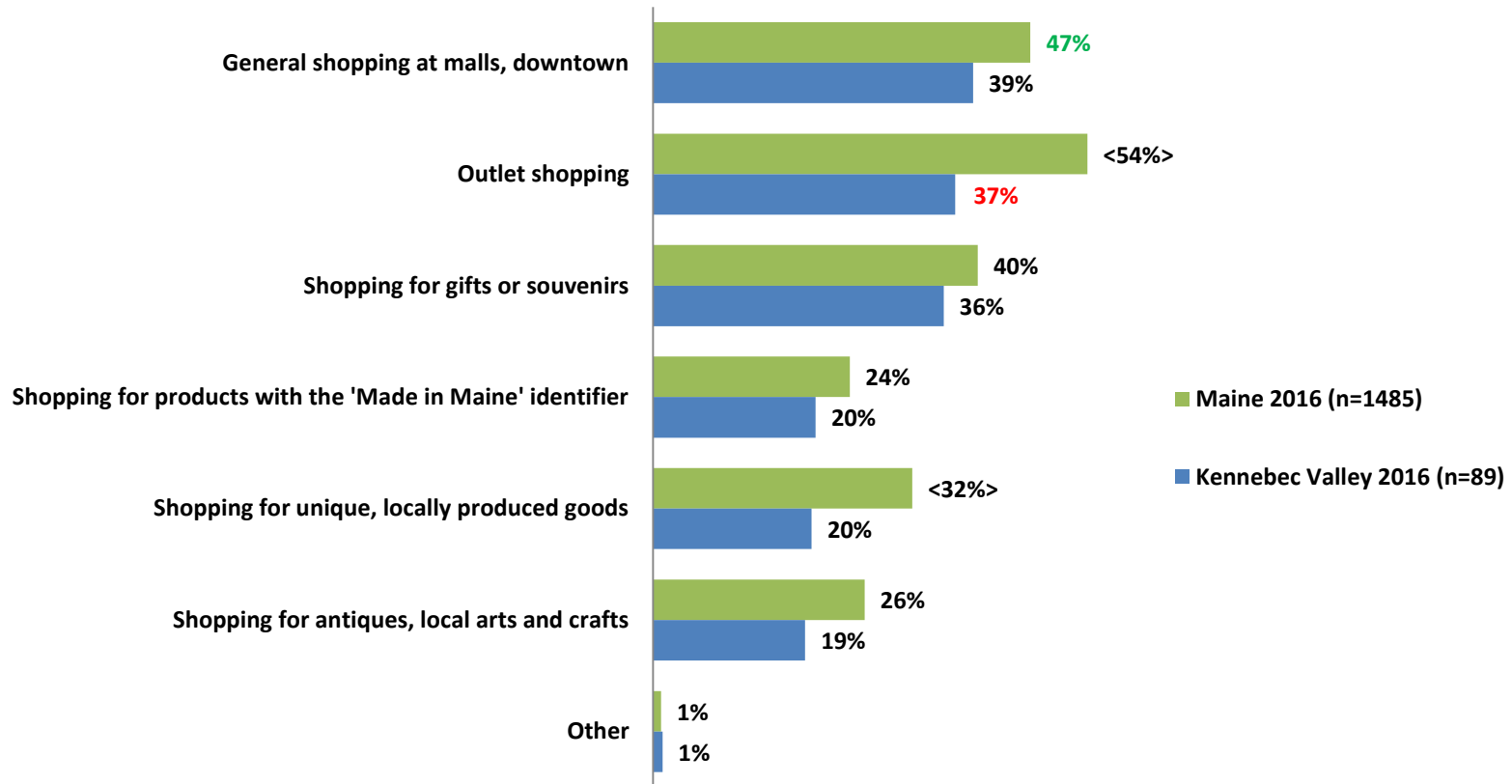
*Please note small sample size. Use caution when interpreting results.

General shopping at malls/downtown, outlet shopping, and shopping for gifts/souvenirs are the most popular shopping activities in the region.

- Outlet shopping and shopping for unique, locally produced goods are less popular shopping activities among overnight visitors to the Kennebec Valley region as compared to overnight visitors to Maine overall.

Shopping Activities

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



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

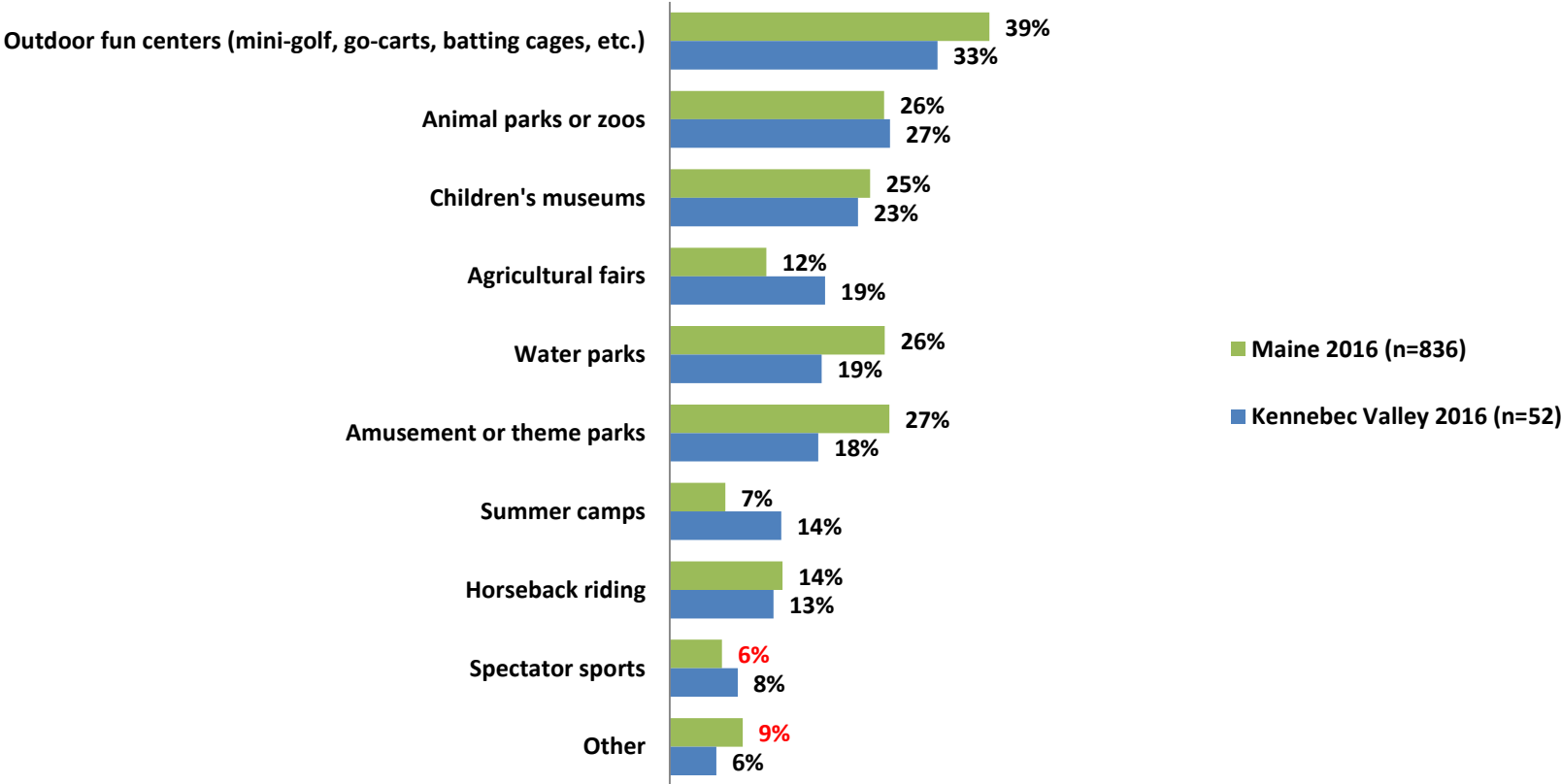
<> indicates a significant difference between subgroups at the 95% confidence level.

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 their Maine trip

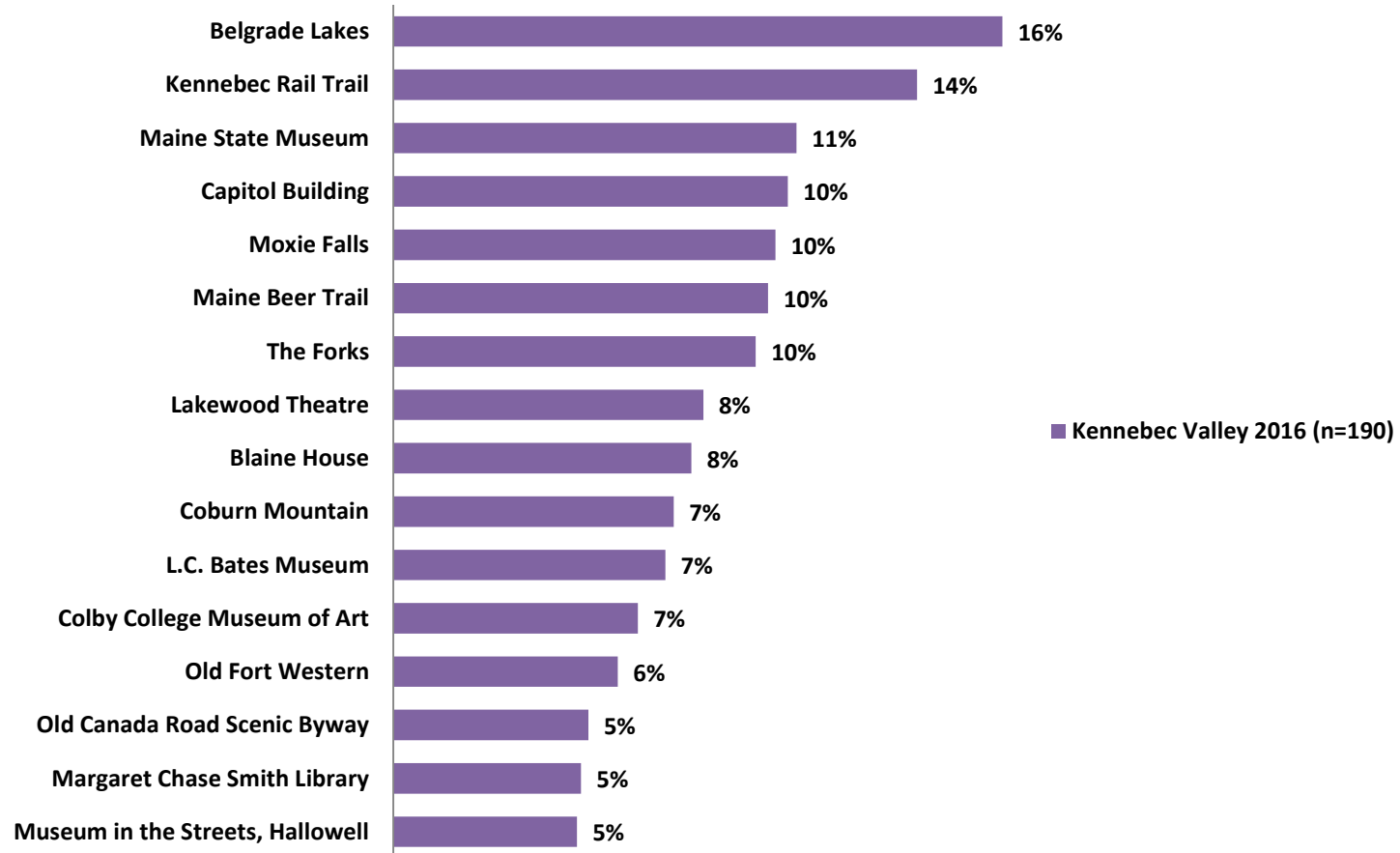


Q34. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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.

The Belgrade Lakes and Kennebec Rail Trail 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.

Q29. Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

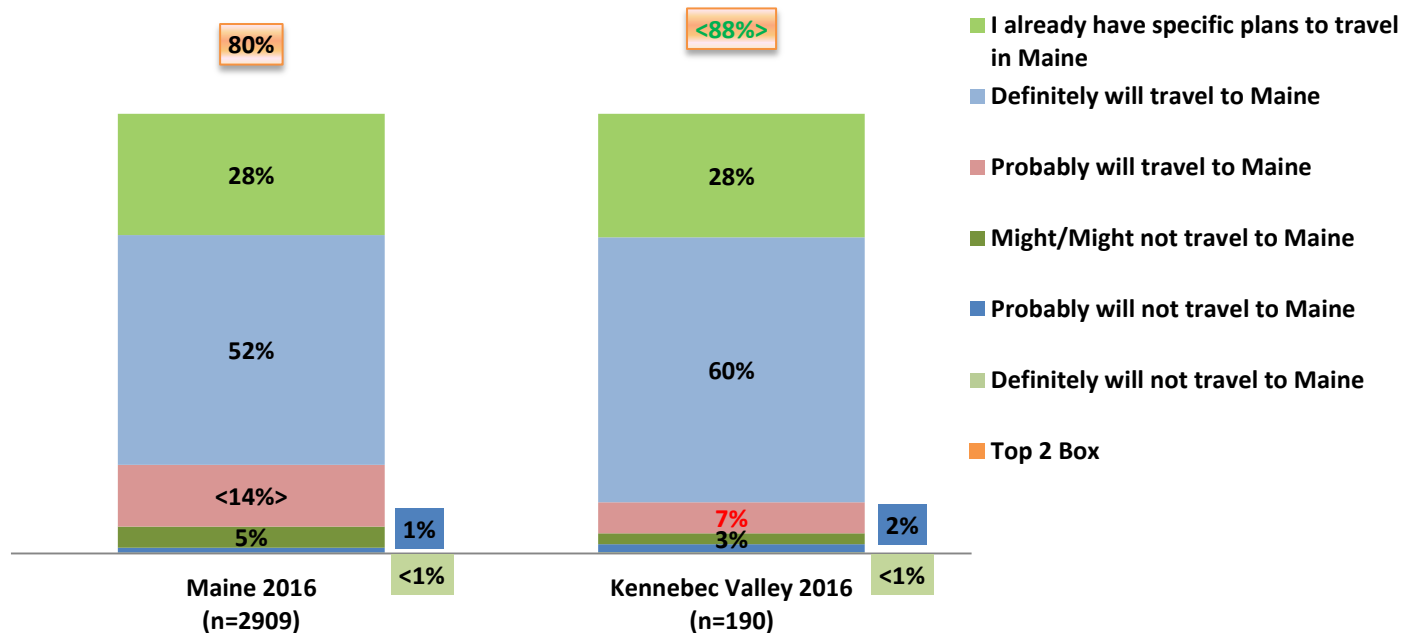
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Nine out of ten overnight visitors to the Kennebec Valley plan to return to Maine in the next two years.

- Overnight visitors to the Kennebec Valley region are more likely to indicate a desire to visit Maine again in the next two years, as compared to overnight visitors to Maine overall.

Future Travel Likelihood



Q41. How likely will you be to travel in Maine in the next two 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.

Day Visitors: Traveler Description

Day Visitor Demographics

- Day visitors to the Kennebec Valley region are 44 years of age, on average, and earn nearly \$72,000 annually. Half have a college degree or are employed full-time.
- Kennebec Valley day visitors have lower annual household incomes than day visitors to the State overall, and are less likely to have a college degree.

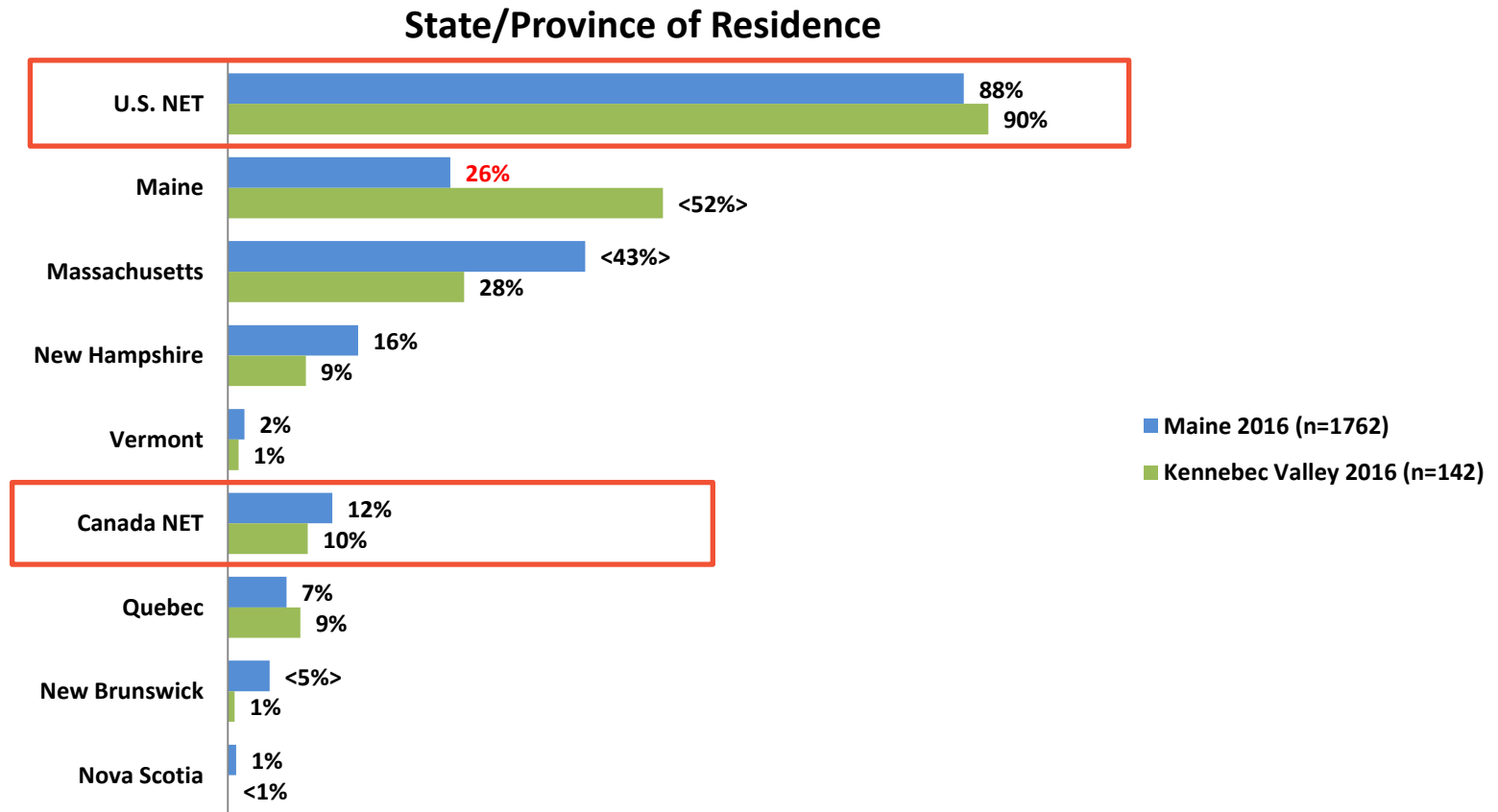
| Day Visitors | Maine 2016 (n=1762) | Kennebec Valley 2016 (n=142) |
|--------------------------|---------------------------|------------------------------------|
| Age: | | |
| < 35 | 28% | 28% |
| 35 - 44 | 18% | <28%> |
| 45 - 54 | 19% | 14% |
| 55 + | 35% | 29% |
| Mean Age (Years) | 46.0 | 44.1 |
| Income: | | |
| < \$50,000 | 26% | 36% |
| \$50,000 - \$99,999 | 42% | 46% |
| \$100,000 + | <32%> | 18% |
| Mean Income | <\$88,100> | \$71,900 |
| Female | 75% | 72% |
| College Degree or Higher | <63%> | 51% |
| Married | 56% | 65% |
| Employed Full-Time | 52% | 47% |

<> 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 Kennebec Valley region are from Maine.

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



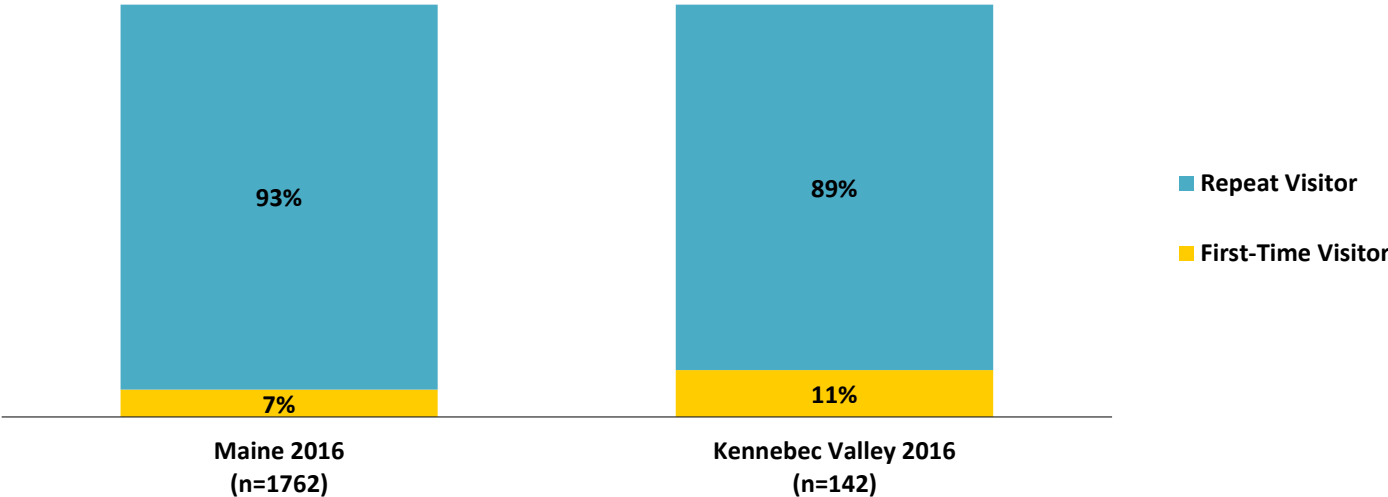
Q2. In what State or Province do you reside?

<> 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 day visitors to the Kennebec Valley region are repeat visitors.

Repeat vs. First-Time Visitors



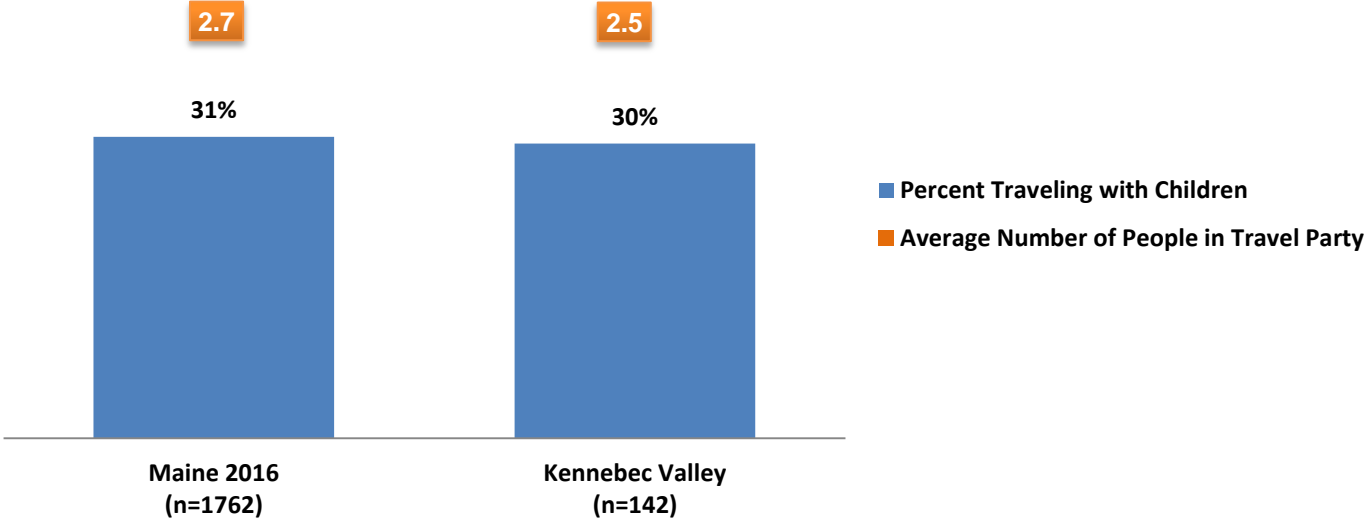
Q10. Was this your first trip to Maine?

<> 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.

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

Travel Party Composition



Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q16. How many of these people were: Children

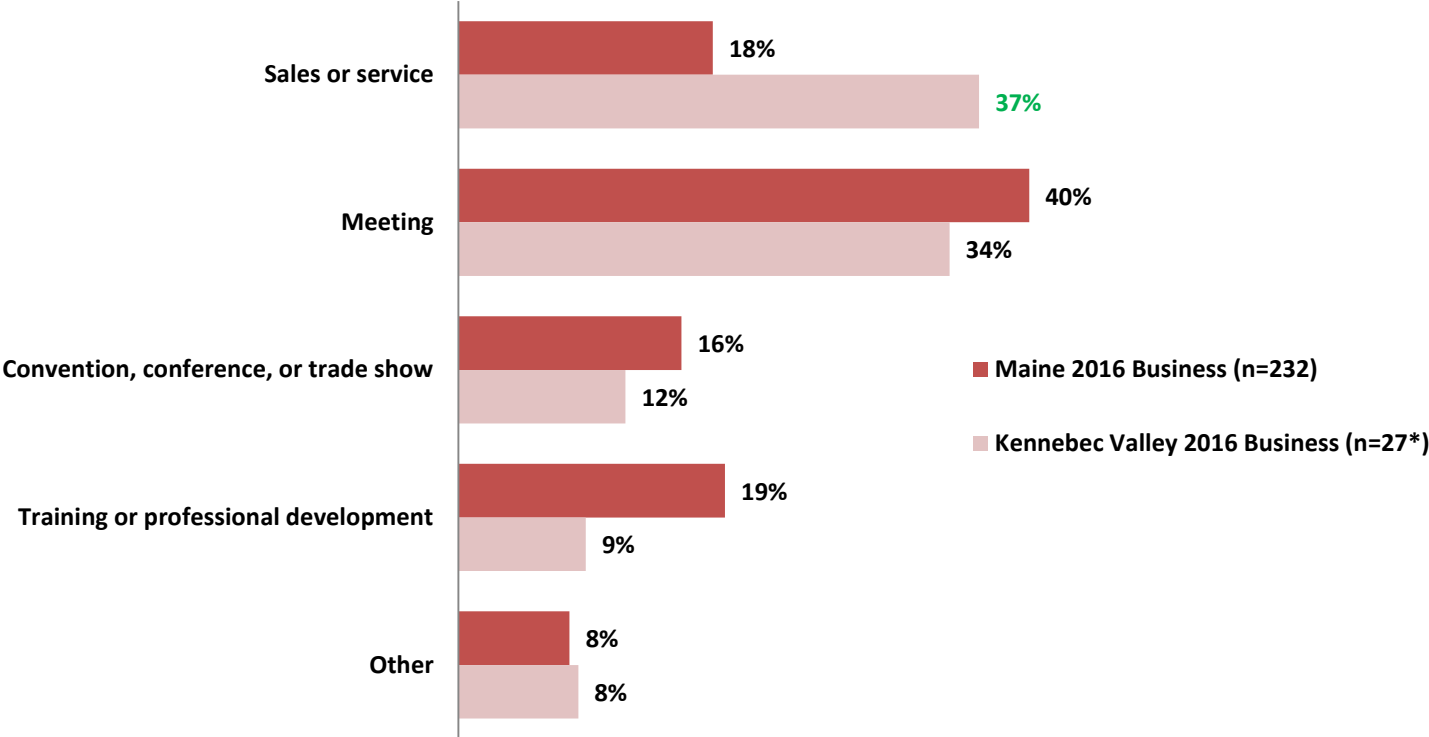
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Day Visitors: Trip Experience

Over one-third of business day travelers visit the Kennebec Valley region for a sales or service trip.

Primary Purpose of Business Day Trips



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

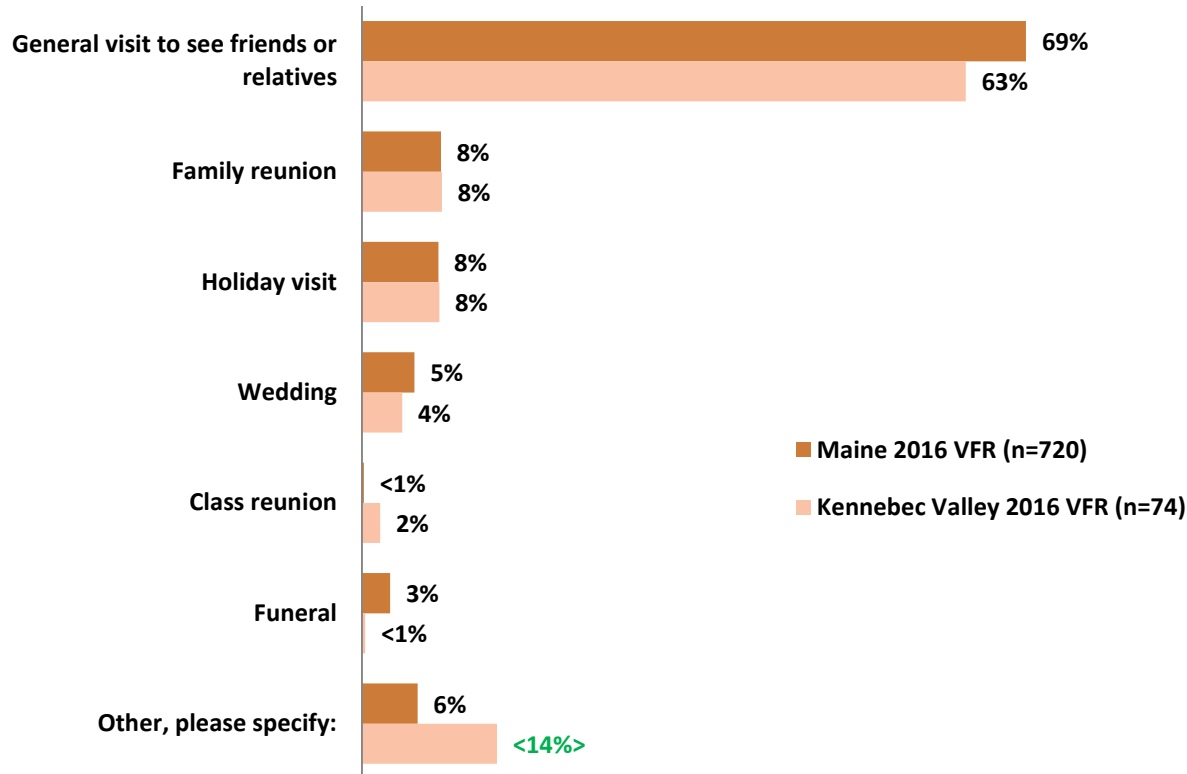
<> indicates a significant difference between subgroups at the 95% confidence level.

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. Use caution when interpreting results.

Nearly two-thirds of VFR travelers to the region cite a *general visit to see friends/relatives* as the primary purpose of their 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?

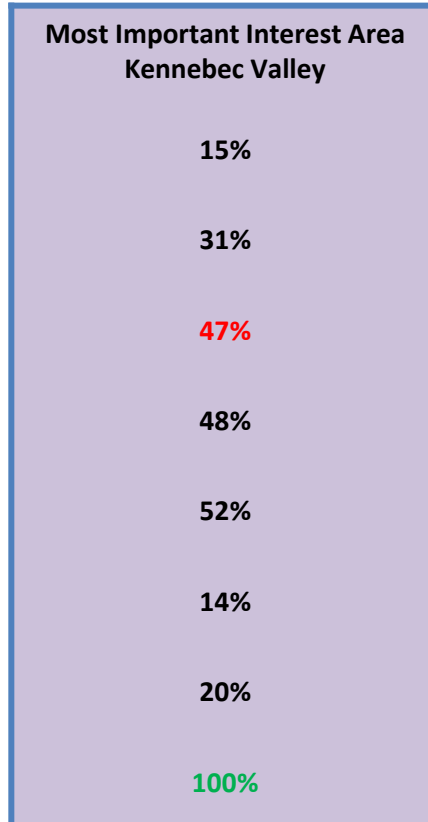
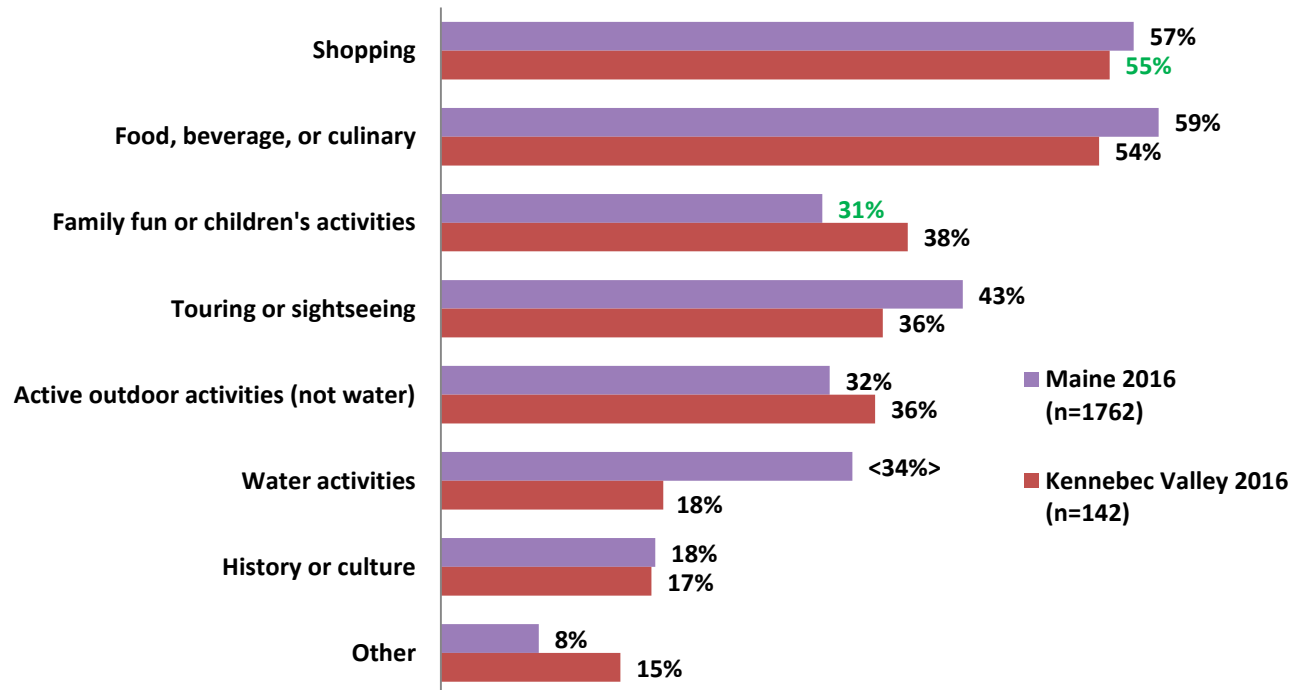
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The most common interest areas pursued by day visitors to the Kennebec Valley are *shopping* and *food/beverage/culinary activities*.

- Water activities are a less popular interest for Kennebec Valley day visitors, as compared to day visitors to the State overall.

2016 Interest Areas



Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

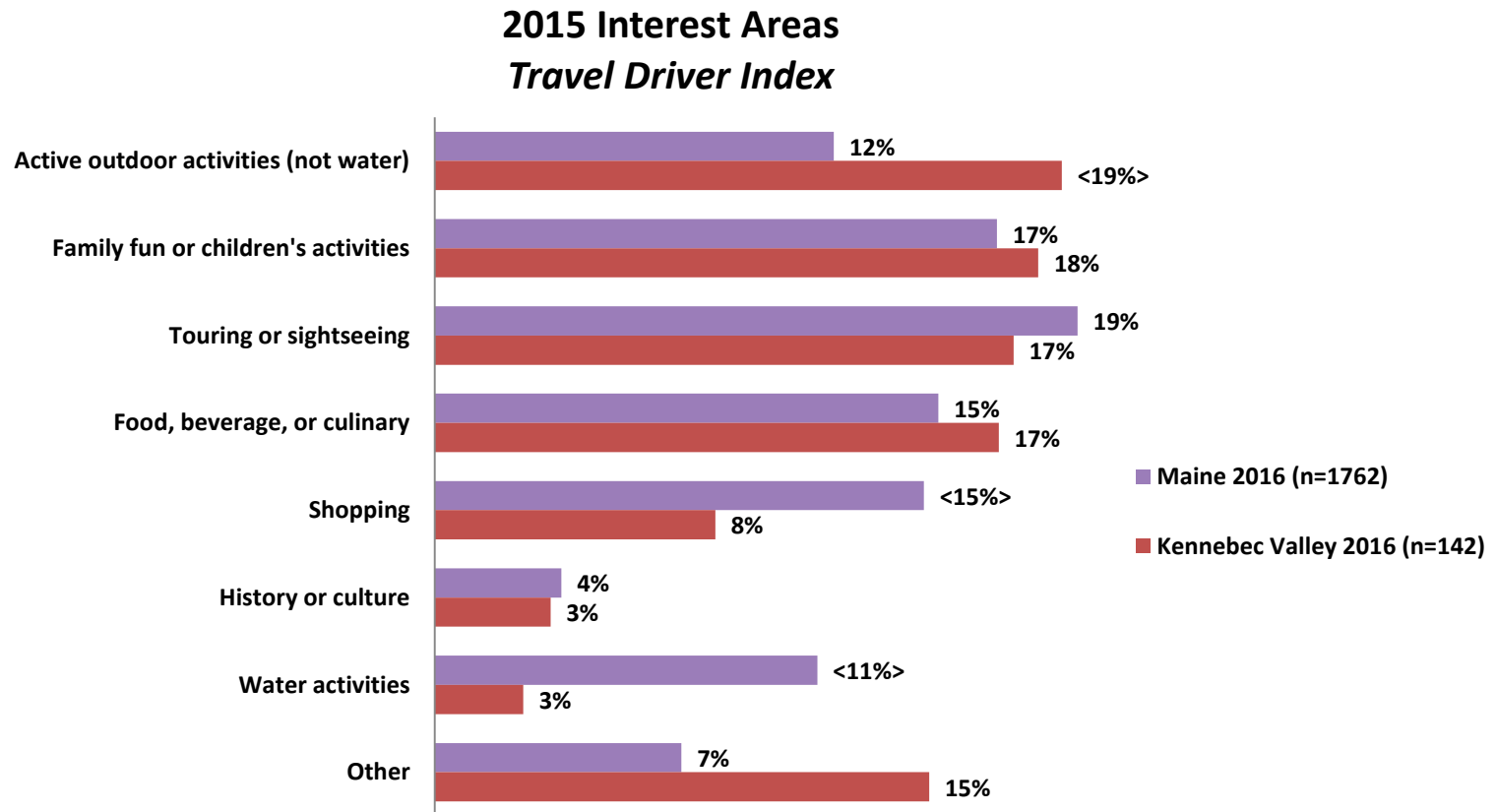
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34

<> 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.

When considering both interest and importance in deciding to visit, a variety of activities rank high among day visitors to this region.

- Kennebec Valley day visitors place more importance on *active outdoor activities* than do day visitors to the State as a whole, while *shopping* and *water activities* are less significant drivers among Kennebec Valley day visitors as compared to visitors to the State as a whole.



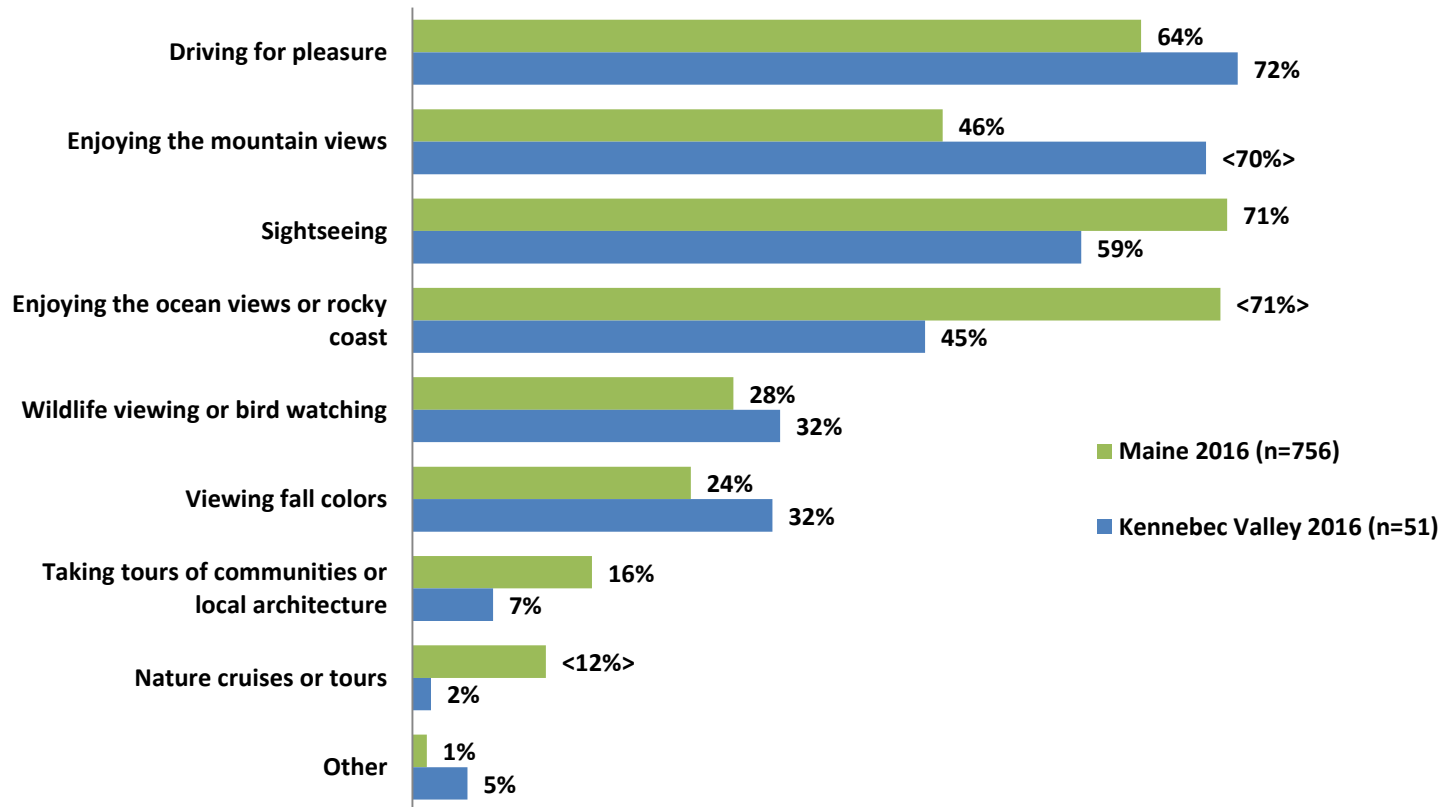
Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Driving for pleasure and enjoying mountain views are the most common activities among day visitors to the Kennebec Valley who are interested in touring or sightseeing.

- Enjoying the mountain views is a more popular activity among Kennebec Valley day visitors than for day visitors to the State as a whole, while *enjoying the ocean views/rocky coast* and *nature cruises/tours* are less popular among Kennebec Valley day visitors.

Touring or Sightseeing Activities

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



Q20. 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.

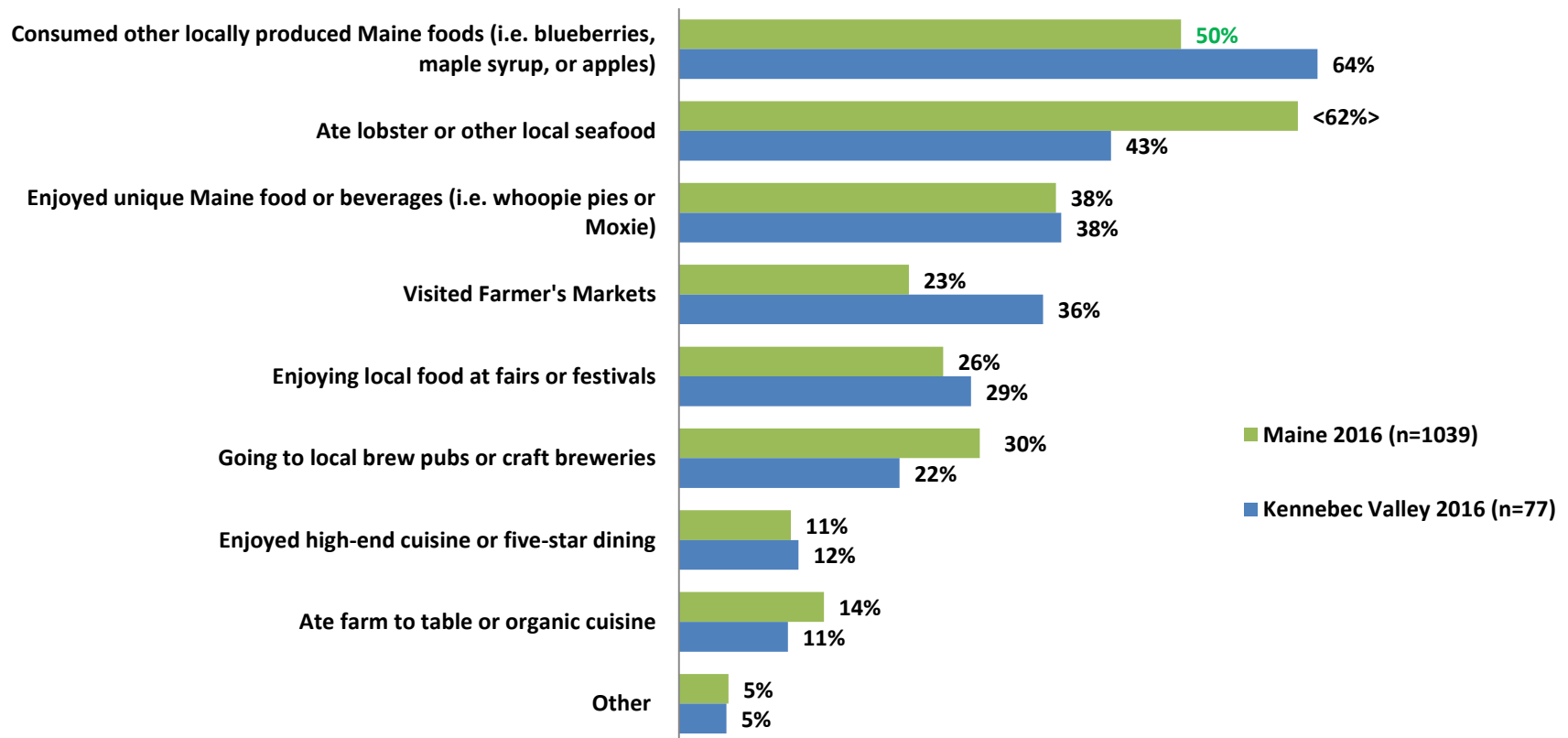
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two-thirds of those interested in food/beverage/culinary activities consumed locally produced Maine foods while in the Kennebec Valley region.

- Kennebec Valley day visitors are less likely than day visitors to the State as a whole to *eat lobster or other local seafood* while visiting.

Food, Beverage, or Culinary Activities

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



Q20. 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.

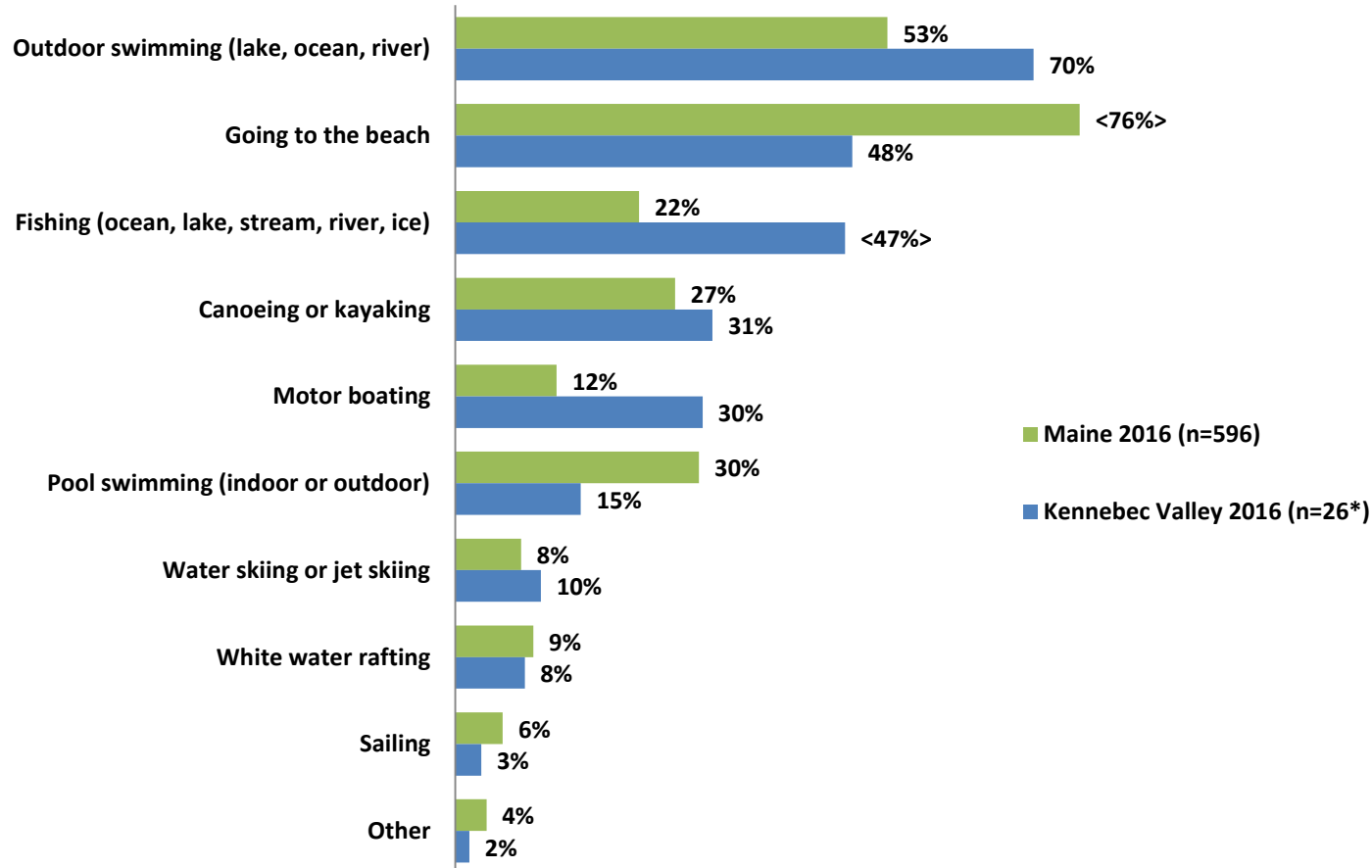
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outdoor swimming is the most popular activity for Kennebec Valley day visitors who are interested in water activities.

- Kennebec Valley day visitors interested in water activities are less likely than day visitors to the State as a whole to *go to the beach* while visiting, and more likely to *go fishing*.

Water Activities

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



Q20. 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.

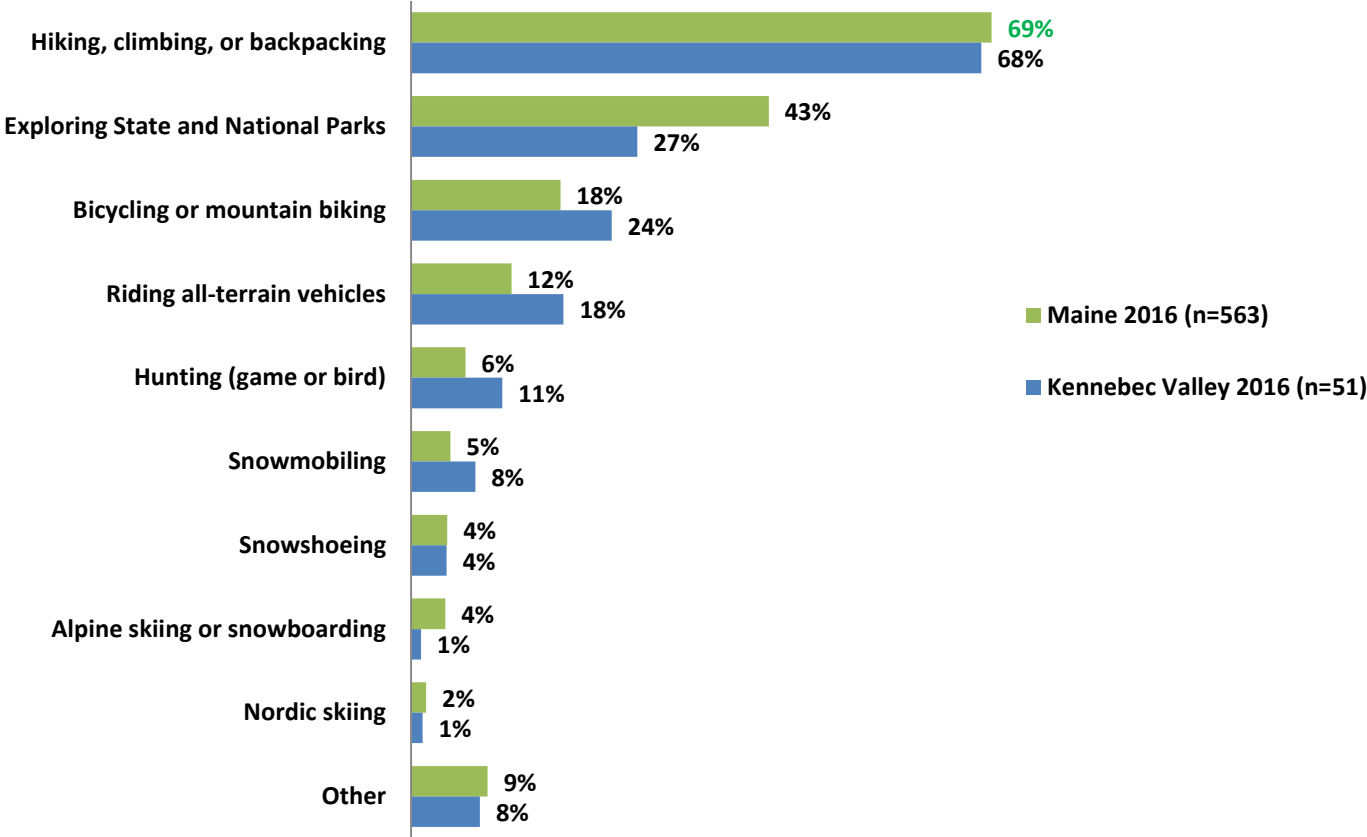
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size. Use caution when interpreting results.

Two-thirds 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 their Maine trip



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

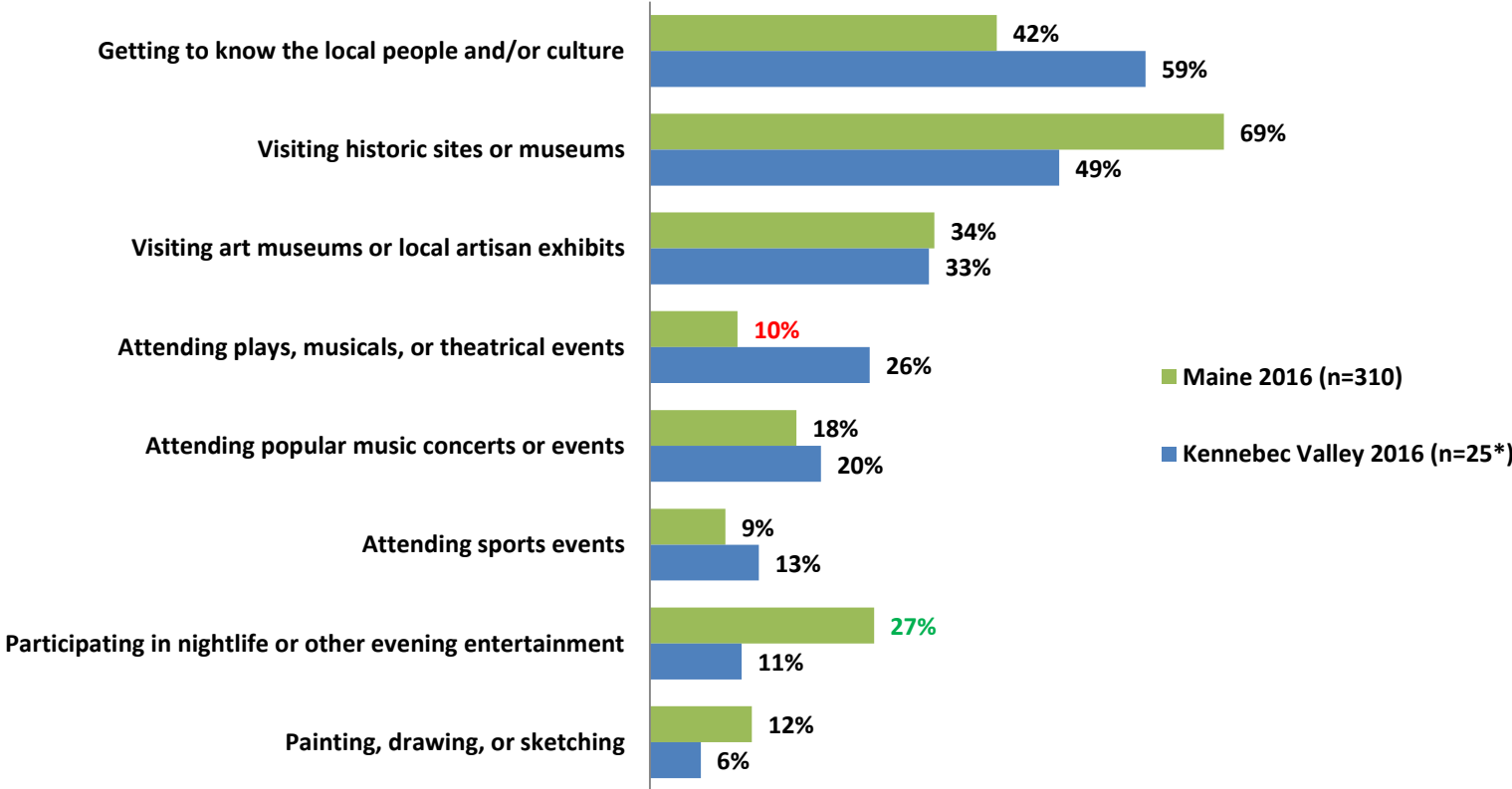
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Getting to know the local people and/or culture and visiting historic sites are the most common history/culture activities among day visitors to the Kennebec Valley.

History or Culture Activities

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



Q20. 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.

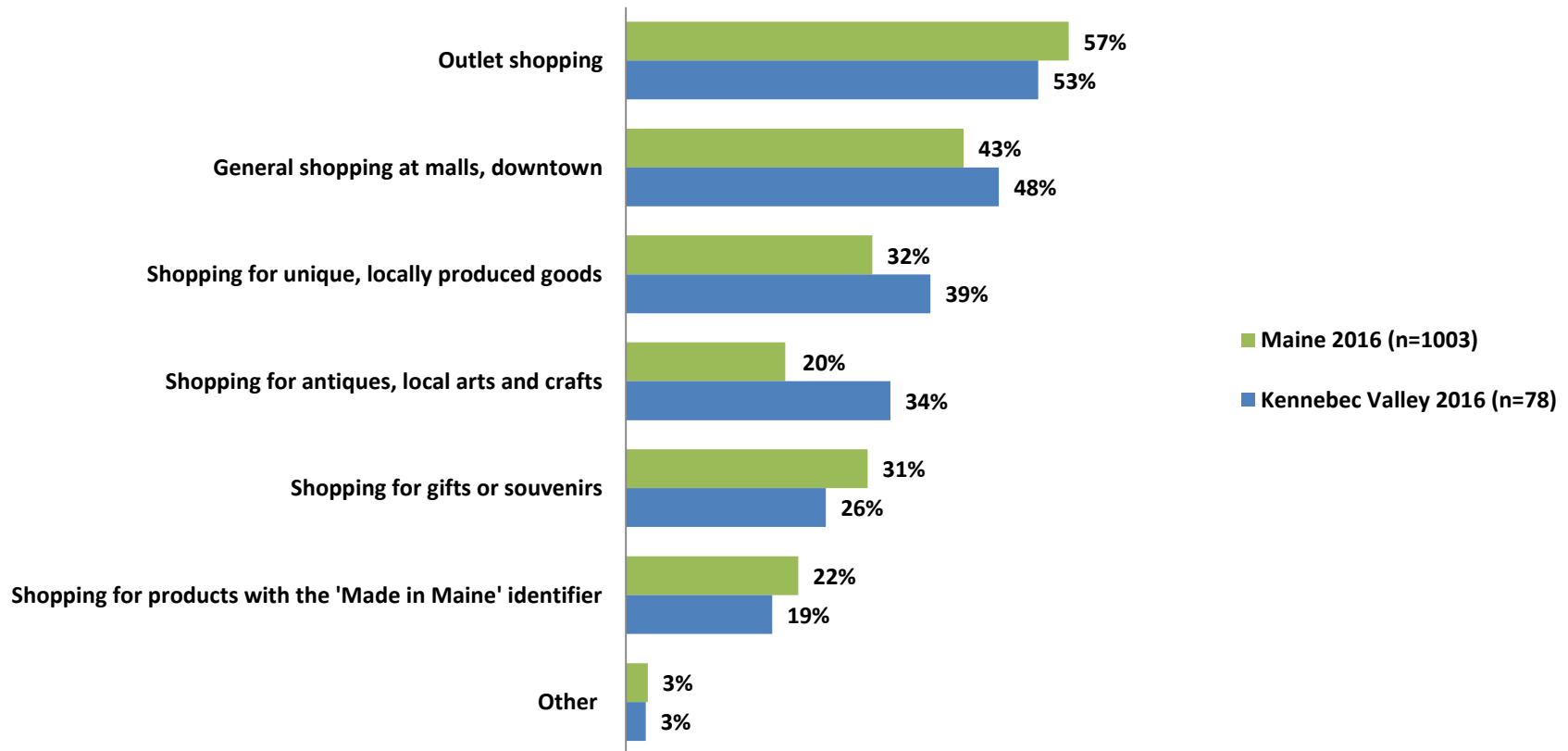
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size. Use caution when interpreting results.

Outlet shopping and general shopping at malls/downtown are the most popular shopping activities among day visitors to the Kennebec Valley.

Shopping Activities

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



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

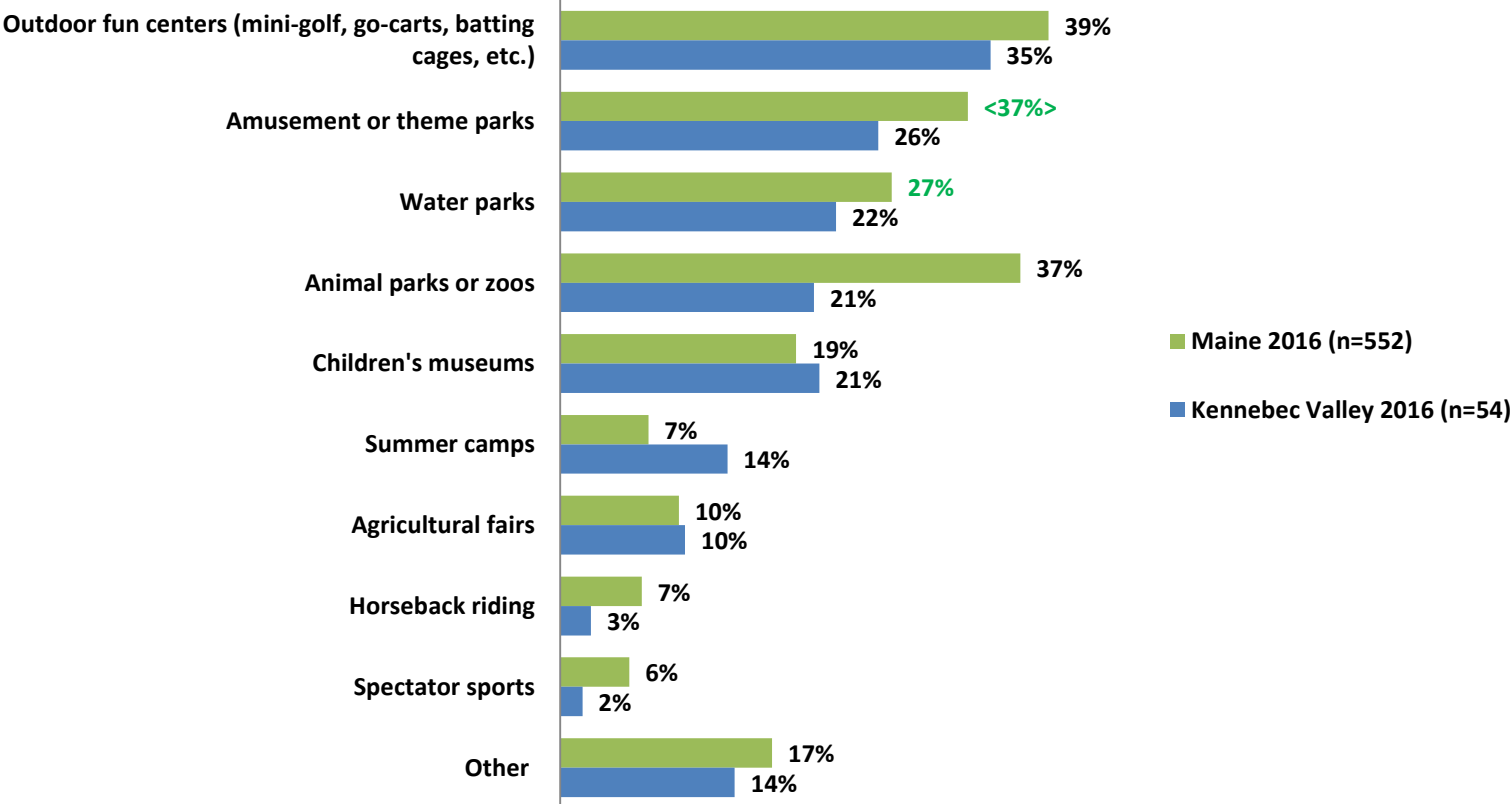
<> indicates a significant difference between subgroups at the 95% confidence level.

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

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 their Maine trip

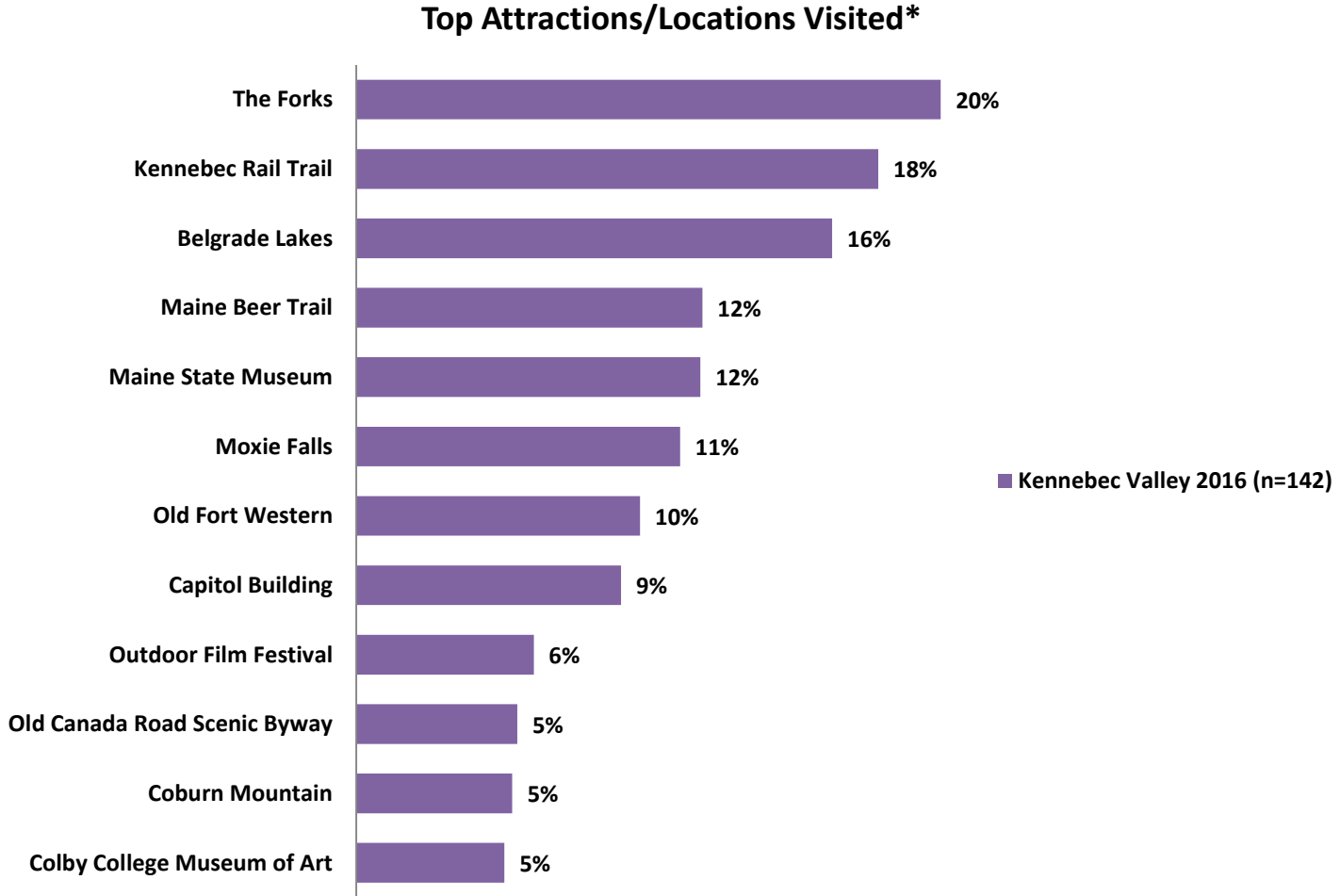


Q20. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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.

One in five day visitors to the Kennebec Valley region visit The Forks or 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 demographics,
 - Visitor origin,
 - 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 of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the State overall, Kennebec Valley visitors differ in the following ways:

DAY VISITORS

A **greater** proportion of visitors from **Maine**

A **lower** proportion of visitors from **Massachusetts** and **New Brunswick**

Visitor Demographics and Travel Intent

OVERNIGHT VISITORS



Tend to be **younger**
More likely to indicate
plans to visit again in
next two years

DAY VISITORS



Lower annual household
incomes
Less likely to have a
college degree

Trip Interest Areas

OVERNIGHT VISITORS



Less likely to pursue
touring/sightseeing
activities

DAY VISITORS



Less likely to pursue
water activities

Trip Interests and Importance (Travel Driver Index)



OVERNIGHT VISITORS

Less likely to be:

Shopping for **unique, locally produced** goods

Outlet shopping

Swimming (outdoors or in a pool)

Hiking/climbing/backpacking

Getting to know the **local people and/or culture**

Eating lobster or other local seafood

Trip Activities

DAY VISITORS

More likely to be:

Enjoying the **mountain views**
Fishing

Less likely to be:

Enjoying **ocean views**
Taking **nature cruises/tours**
Eating lobster or other local
seafood
Going to the **beach**
Visiting **amusement parks**



Digital **Research** Group
DRI | CRITICAL **INSIGHTS** | dpa

Davidson-Peterson Associates
172 Commercial Street
Portland, ME 04101
207.985.7660
www.digitalresearch.com