



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

Regional Insights: Maine Highlands



Prepared by



April 2017

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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

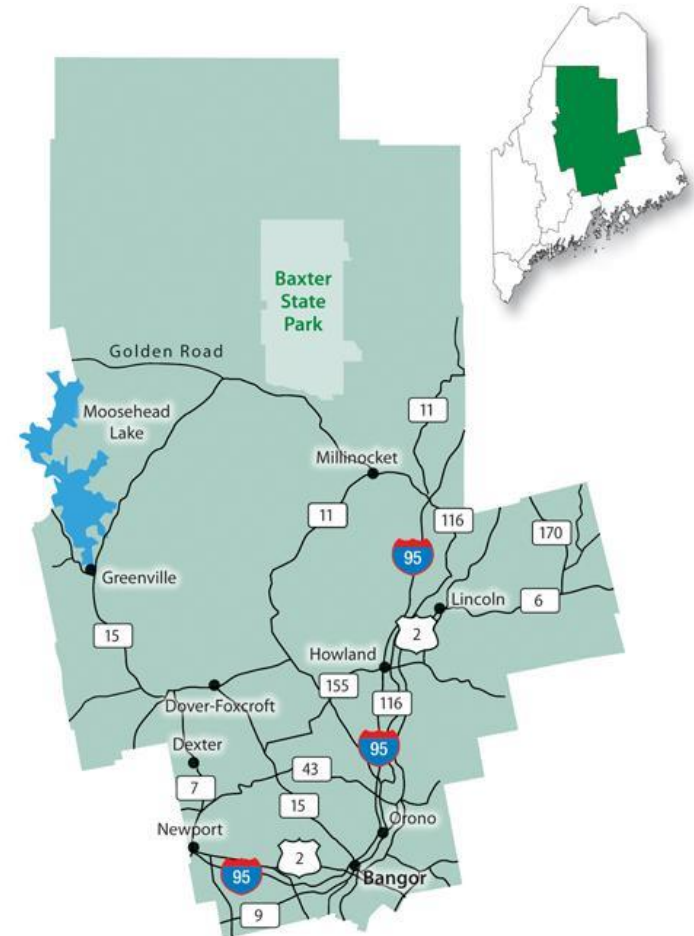
Research Objectives and Methodology

- 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 the results among visitors to the **Maine Highlands** tourism region during 2016, including:
 - 475 overnight visitors, and
 - 125 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 < >. *(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 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 region are, on average, 39 years old and have average annual household incomes of about \$100,000. Six in ten have at least a college degree, and half are married. Seven in ten are employed full-time.
- Compared to all overnight visitors to the State of Maine, overnight visitors to the Maine Highlands region tend to be younger.

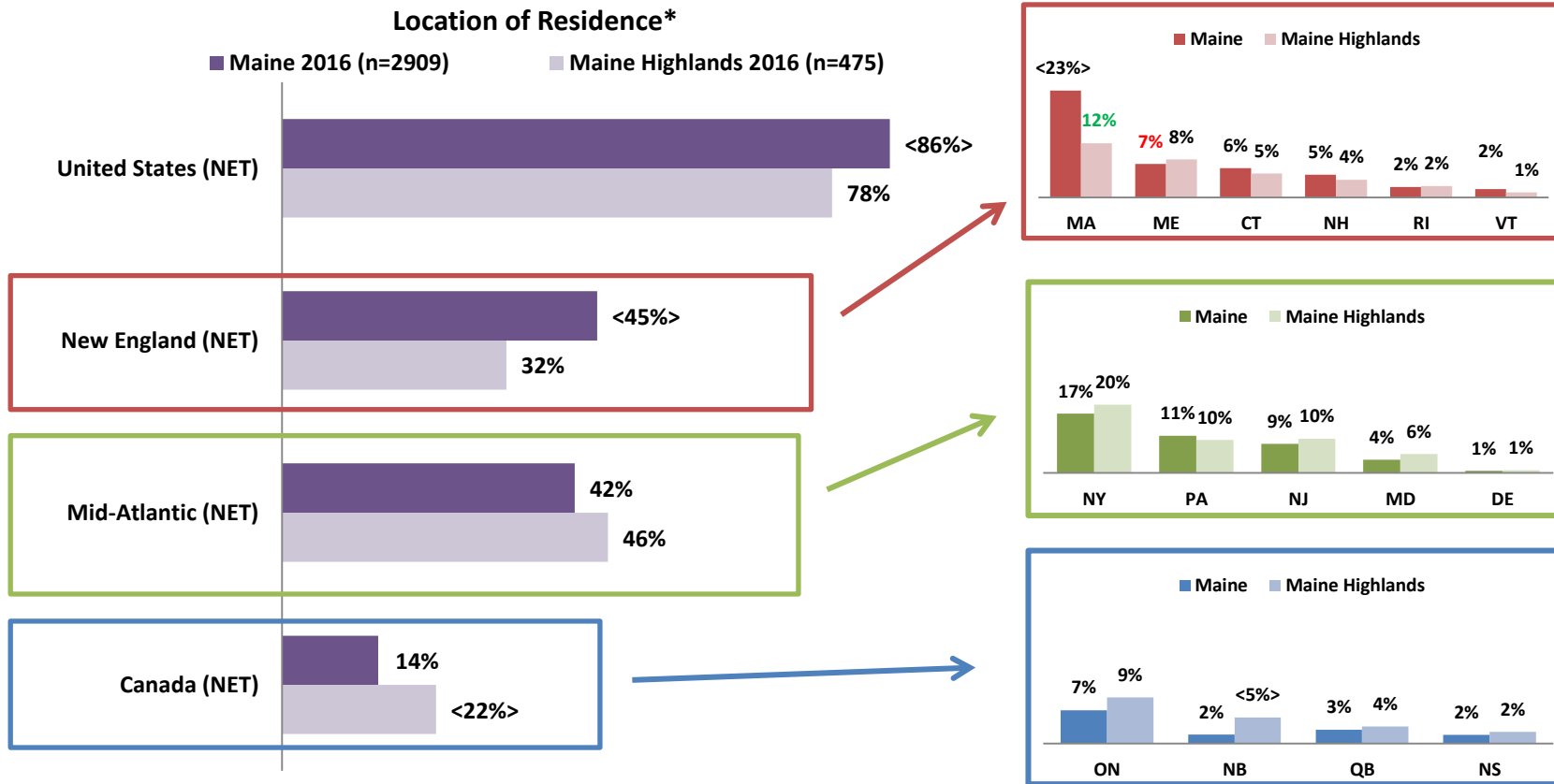
Overnight Visitors	Maine 2016 (n=2909)	Maine Highlands 2016 (n=475)
Age:		
< 35	34%	<41%>
35 - 44	22%	28%
45 - 54	18%	14%
55 +	<26%>	18%
Mean Age (Years)	42.8	39.3
Income:		
< \$50,000	20%	20%
\$50,000 - \$99,999	42%	40%
\$100,000 +	39%	40%
Mean Income	\$98,700	\$100,600
Female	<60%>	54%
College Degree or Higher	66%	63%
Married	56%	53%
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.

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

- Compared to the State of Maine as a whole, the Maine Highlands region attracts a greater proportion of overnight visitors from Canada, and a lesser proportion from the United States (especially New England).
- Overnight visitors to the Maine Highlands are less likely than visitors to Maine overall to come from Massachusetts.



*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.

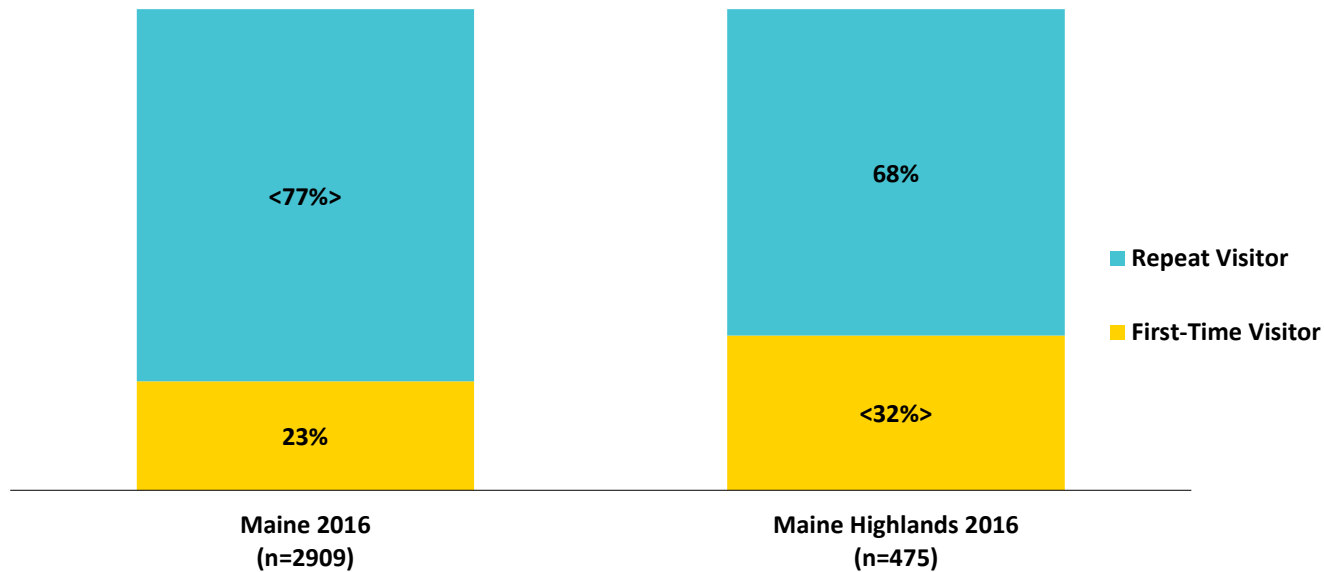
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One-third of overnight visitors to the Maine Highlands region are visiting for the first time.

- Overnight visitors to the Maine Highlands region are more likely to be visiting Maine for the first time than are visitors to the State as a whole.

Repeat vs. First-Time Visitors



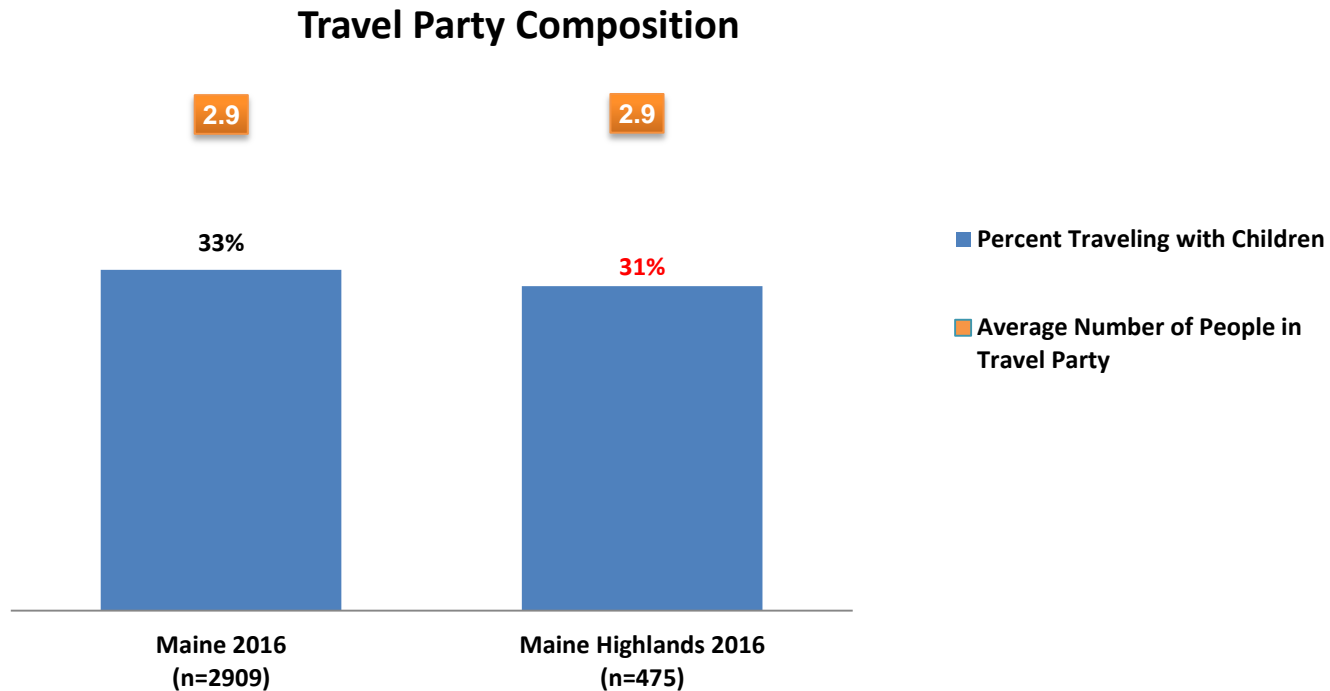
Q11. Was this your first visit in Maine?

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

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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.

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



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?

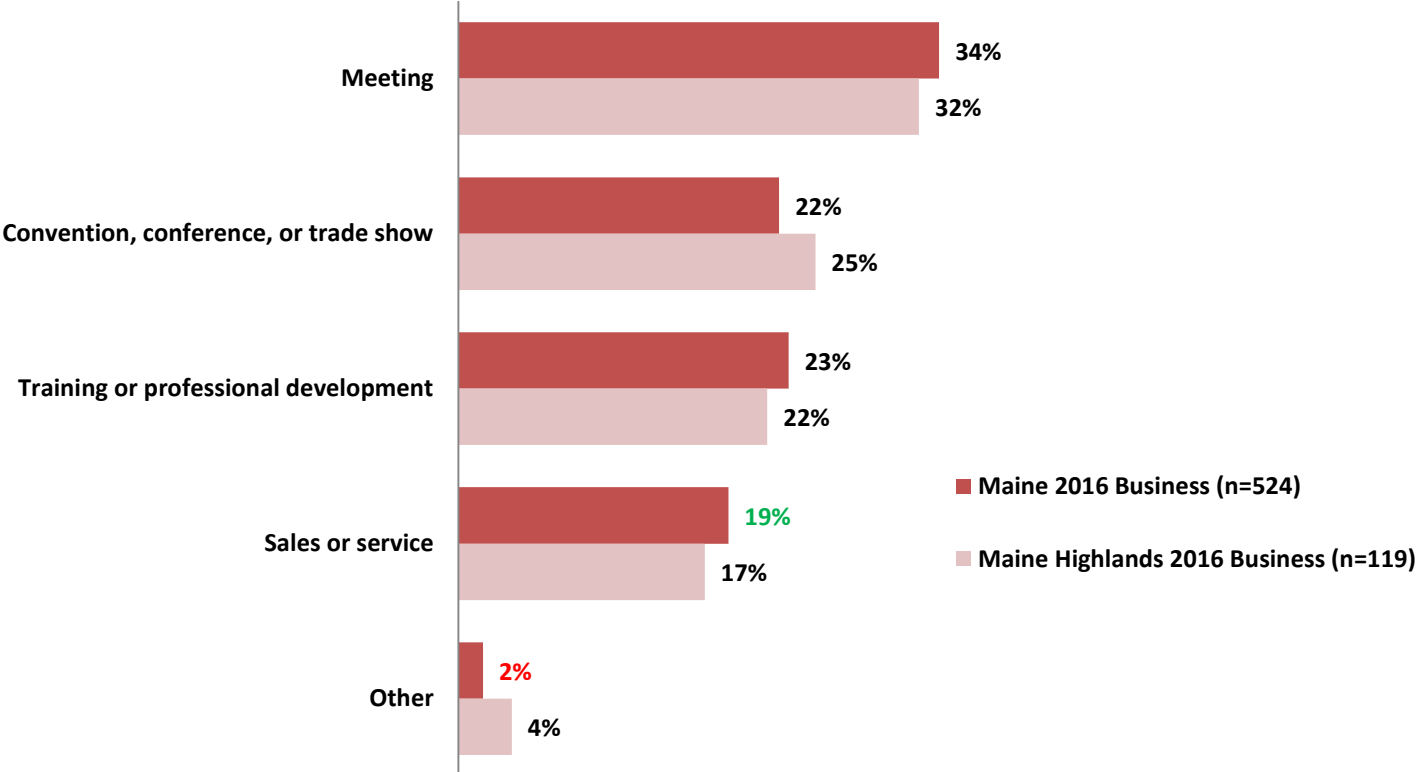
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Overnight Visitors: Trip Experience

Attending a *meeting* is the top reason for an overnight business trip to the Maine Highlands region.

Primary Purpose of Overnight Business Trips



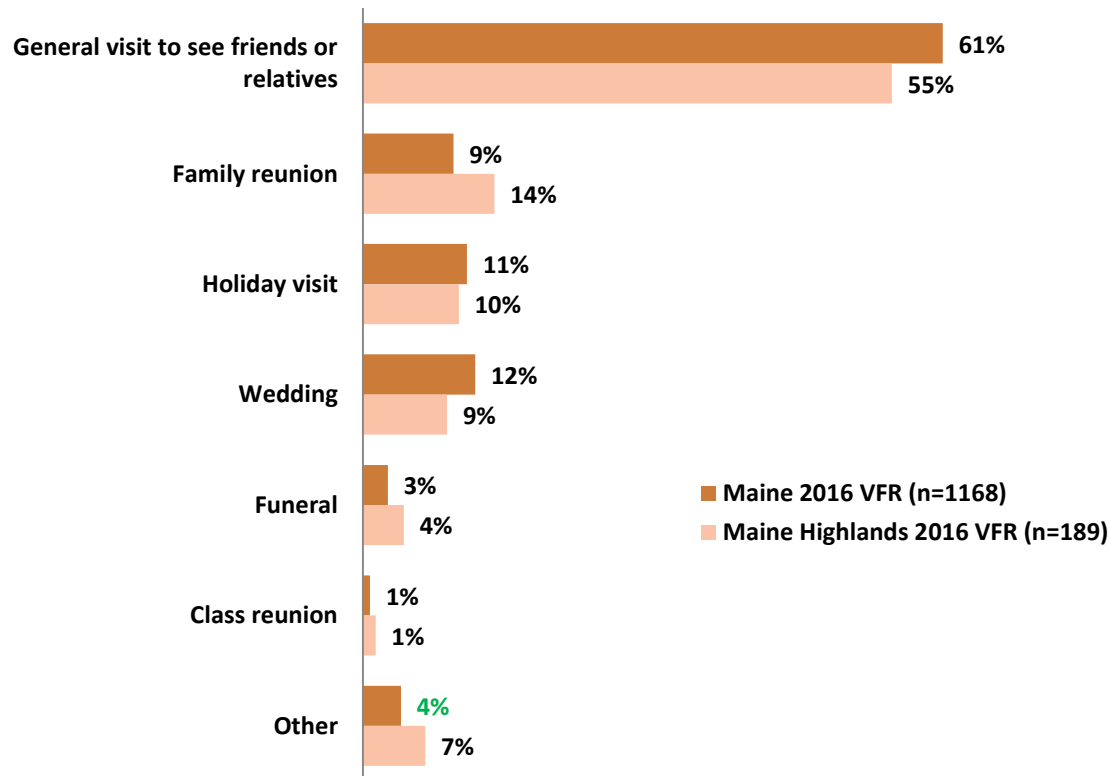
Q8. What was the primary purpose of your most recent business trip in Maine?

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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.

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

Primary Purpose of Overnight VFR Trips

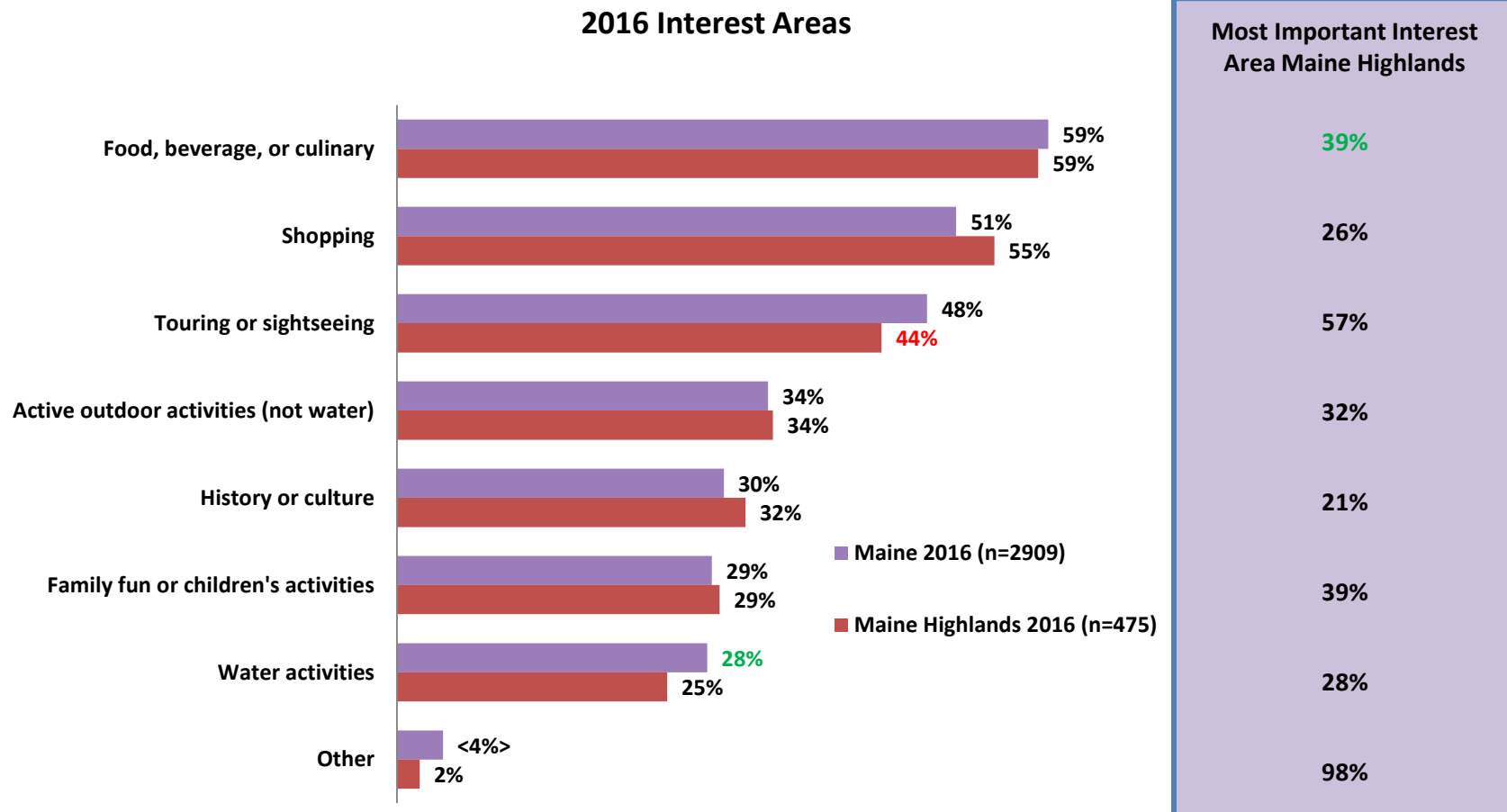


Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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Over half of overnight travelers to the Maine Highlands region are interested in pursuing *food/beverage/culinary* activities or *shopping* while in the area.



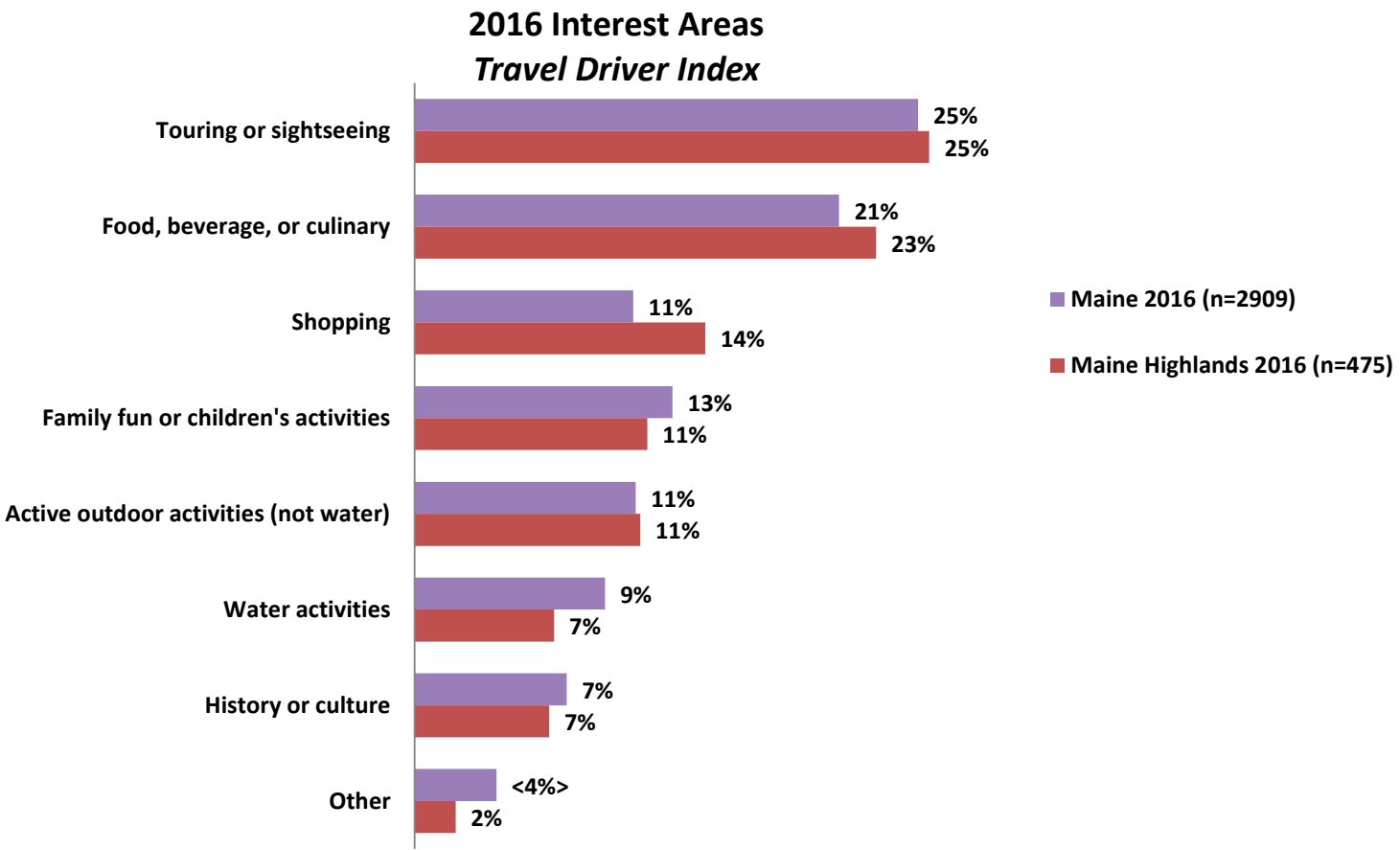
Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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 in deciding to visit, touring/sightseeing and food/beverage/culinary activities rank highest among overnight visitors to the Maine Highlands region.



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



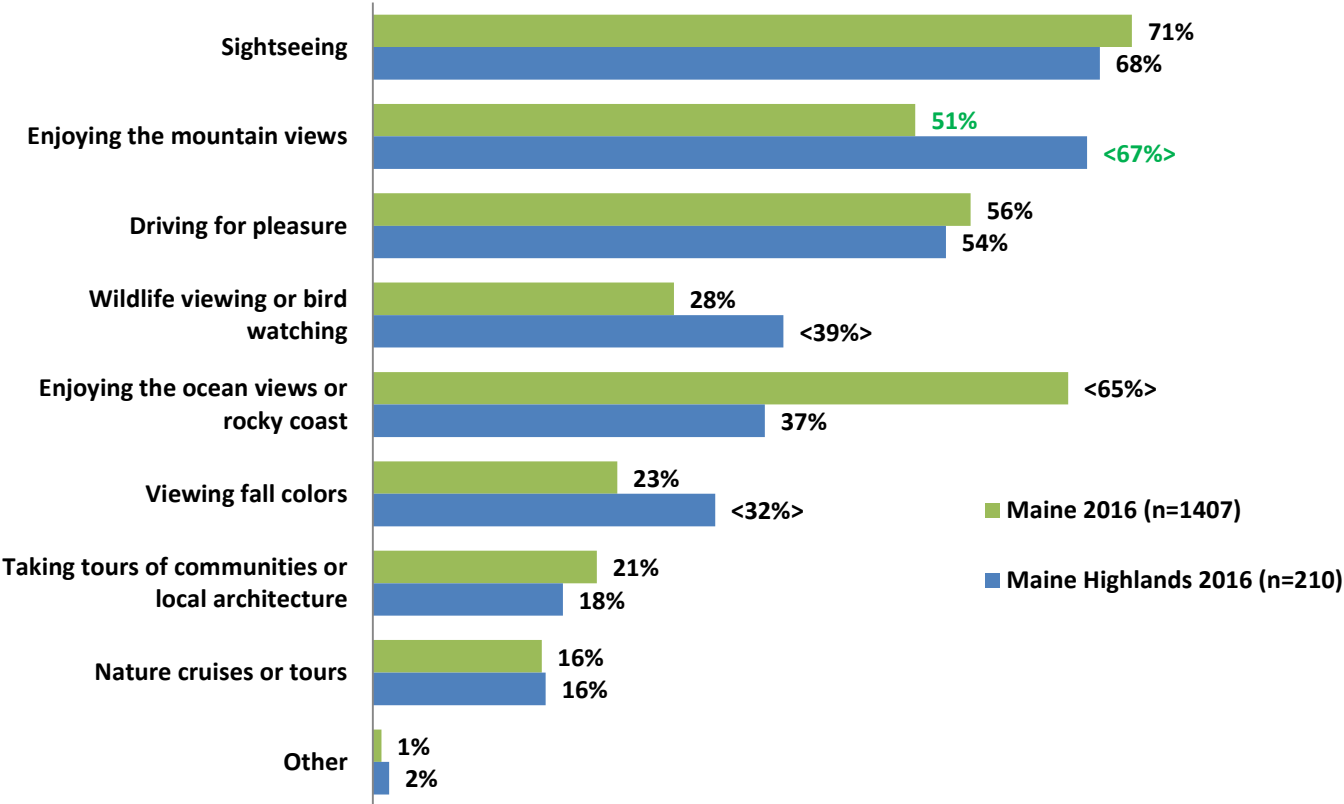
Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 16
 <> indicates 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 and enjoying the mountain views are the most common touring/sightseeing activities of overnight visitors to the Maine Highlands region.

- Maine Highlands visitors are more likely to *enjoy mountain views*, participate in *wildlife viewing/bird watching*, and *view fall colors* compared to visitors to Maine overall, but less likely to be *enjoying ocean views*.

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.

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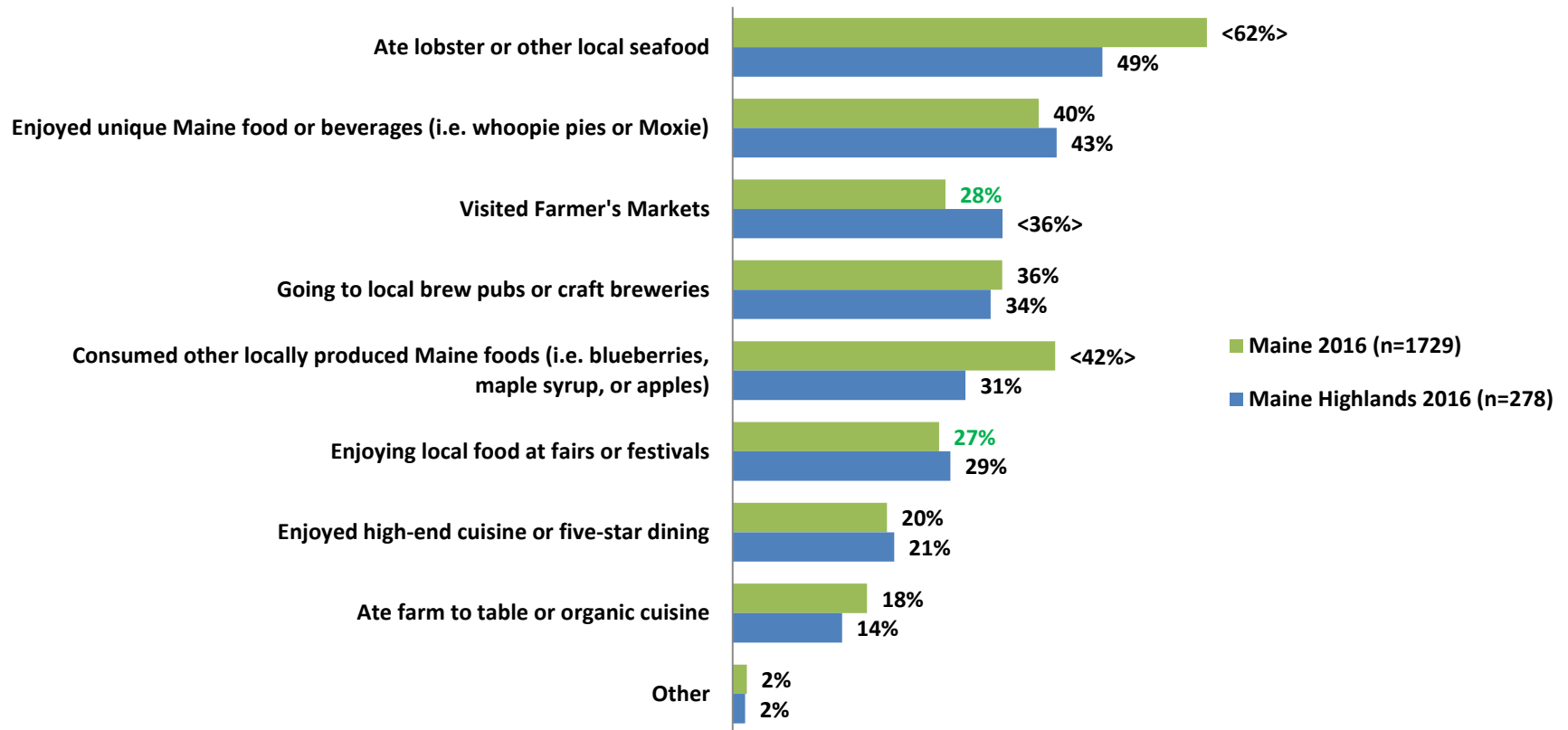
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common food/beverage/culinary activity among Maine Highlands overnight visitors is *eating lobster or other local seafood*.

- *Eating lobster/other local seafood* and *consuming locally produced Maine foods* are both less popular among Maine Highlands visitors than among visitors to Maine as a whole. *Visiting Farmer's Markets*, however, is more popular among this region's overnight visitors.

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.

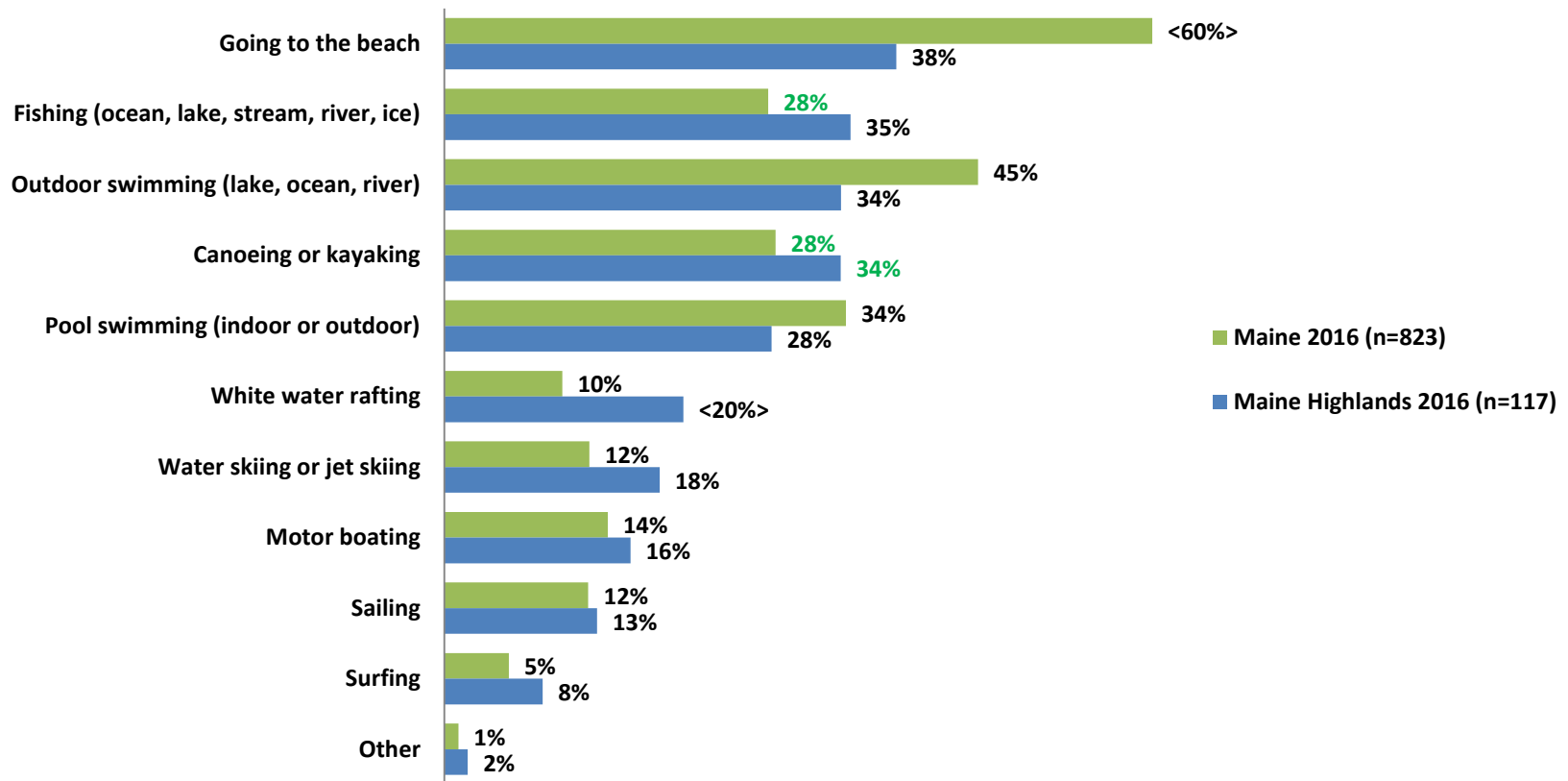
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common water activity among overnight visitors to this region is going to the beach, followed closely by fishing, outdoor swimming, and canoeing/kayaking.

- Overnight visitors to the Maine Highlands region are more likely than visitors to the State overall to go *white water rafting* while in Maine, but less likely to go *to the beach*.

Water Activities

Base: Those who report water 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.

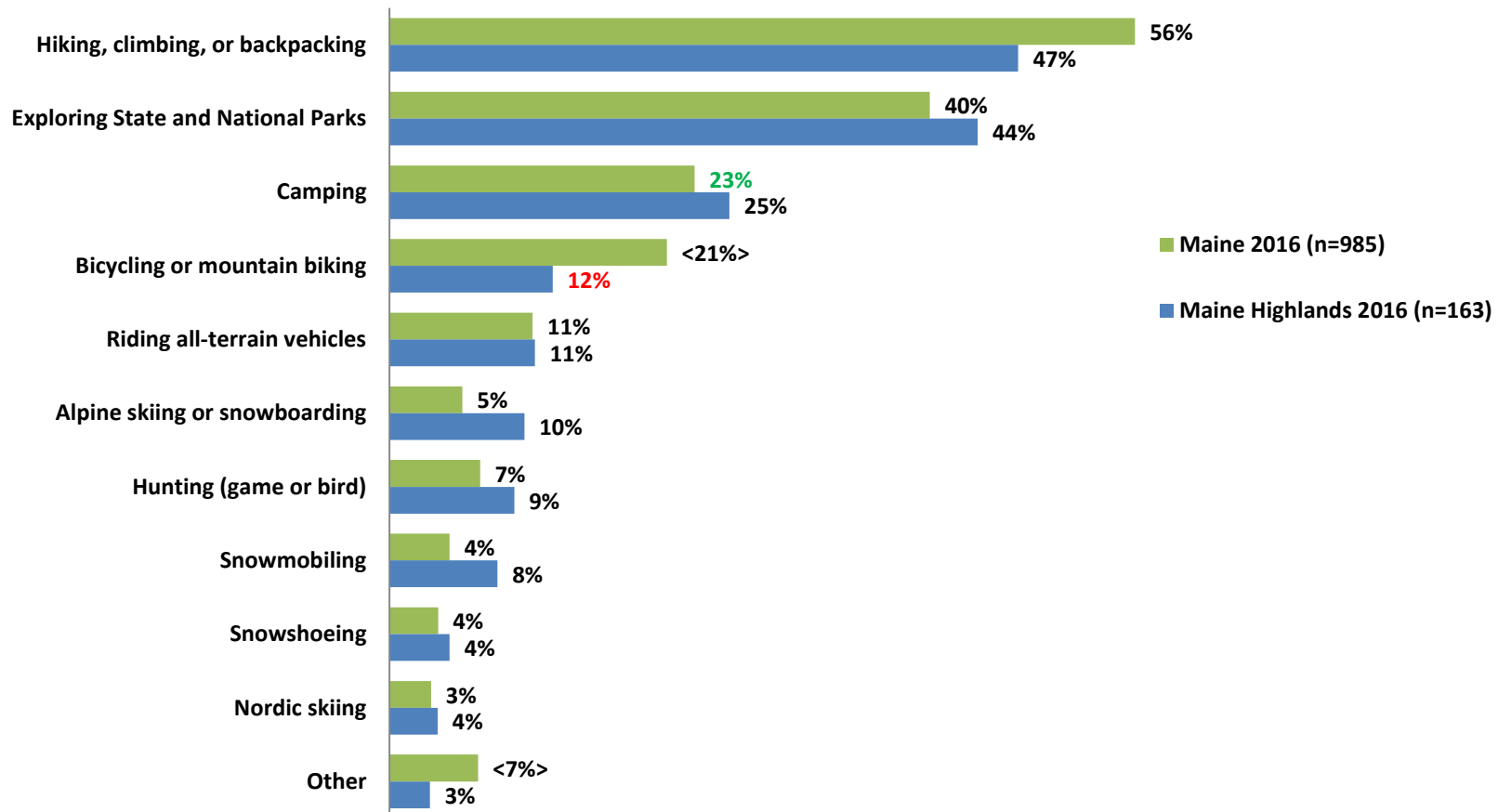
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of those interested in active outdoor activities *hike/climb/backpack* during their overnight visit to the Maine Highlands region. Nearly as many explore state parks.

- *Bicycling or mountain biking* is less popular among overnight visitors to the Maine Highlands region than among visitors to Maine as a whole.

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.*

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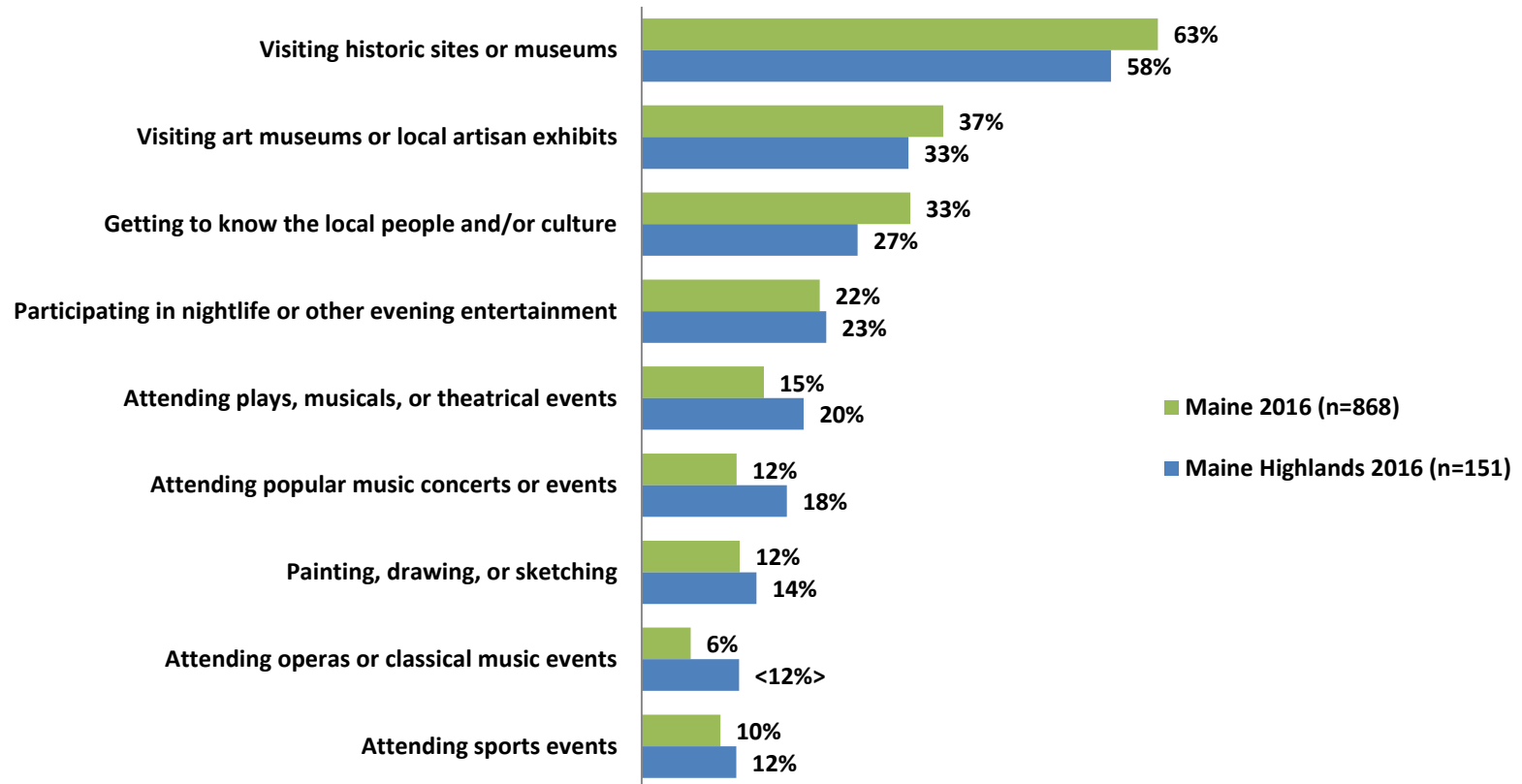
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- *Attending operas or classical music events* is a more popular history/culture activity among Maine Highlands visitors, as compared to Maine visitors overall.

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.*

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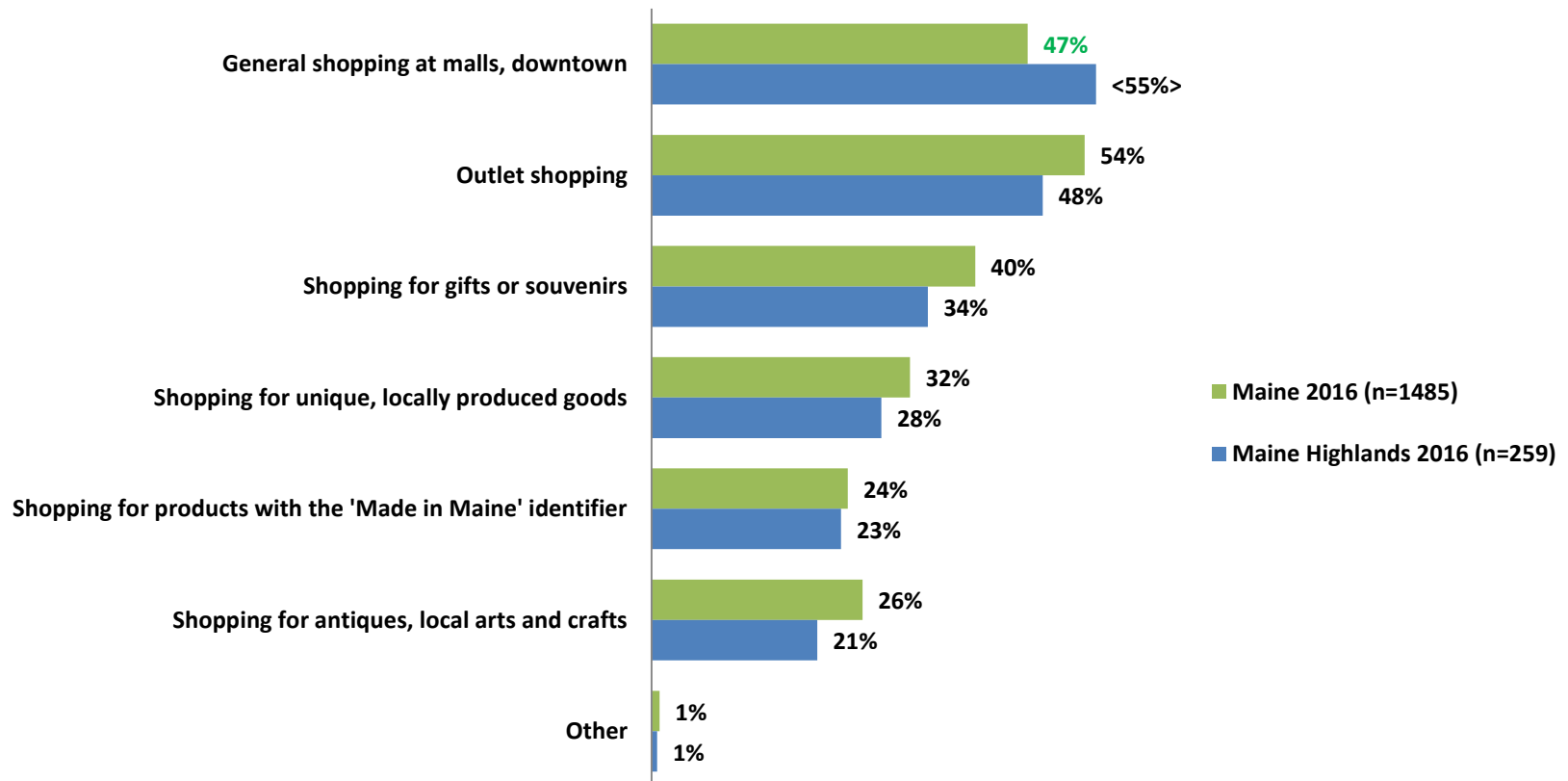
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Maine Highlands visitors are more likely than Maine visitors overall to do some *general shopping in malls or downtown*.

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.*

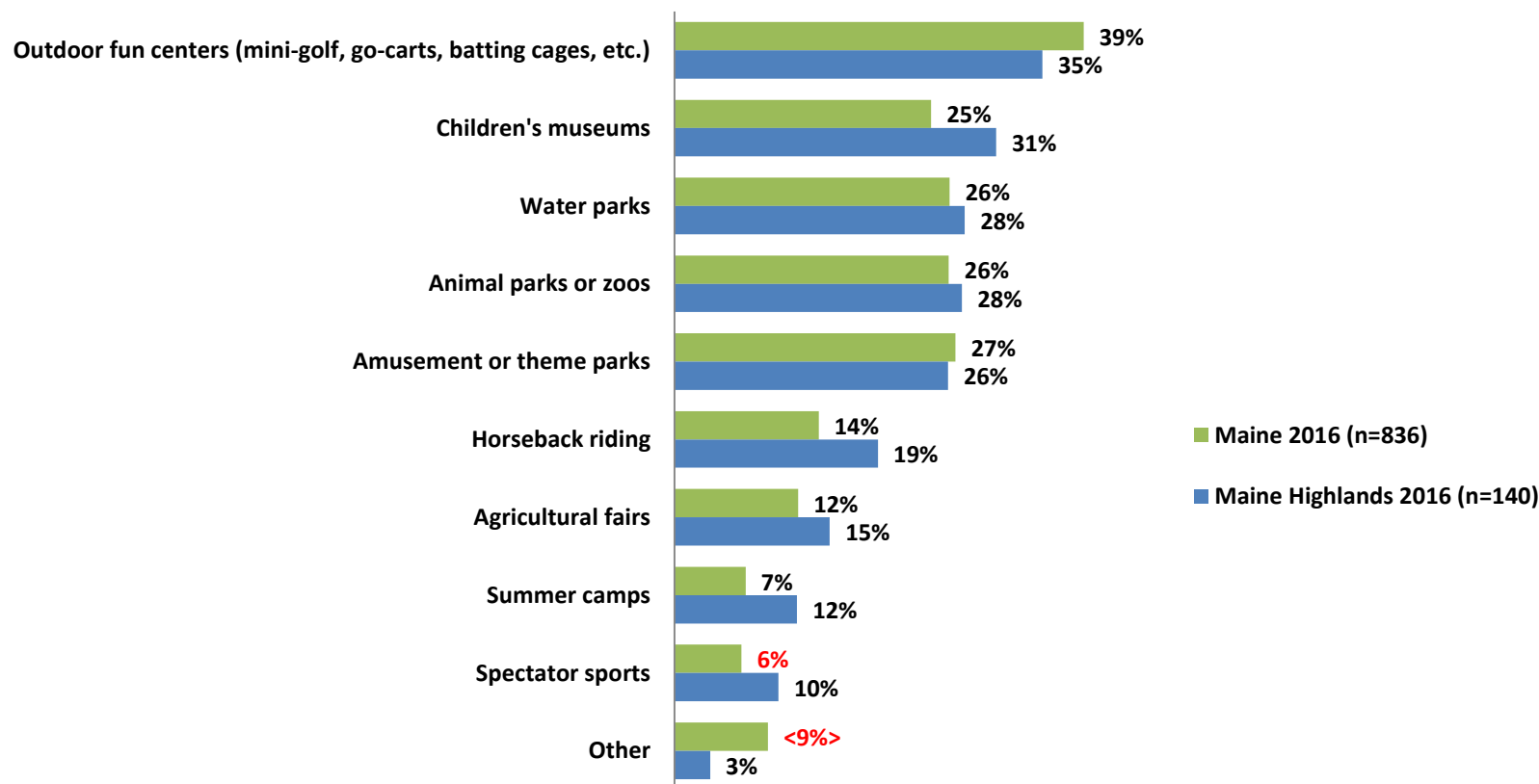
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Overnight visitors to the Maine Highlands region who are interested in family fun/children's activities participate in a wide variety of these types of activities.

Family Fun/Children's Activities

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



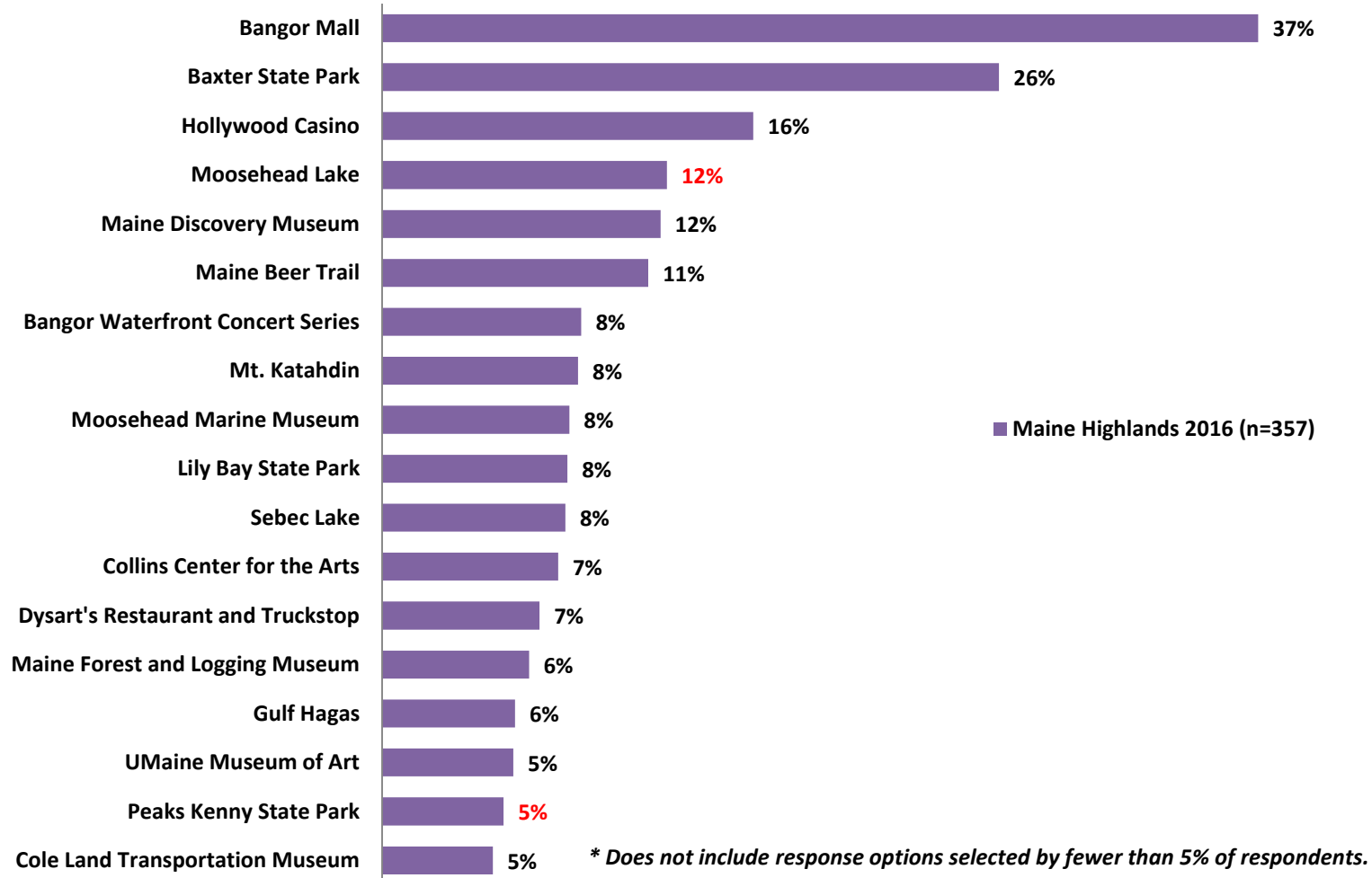
Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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One in three overnight visitors to the Maine Highlands visited the *Bangor Mall* while in the region. One in four visited *Baxter State Park*.

Top Attractions/Locations Visited*



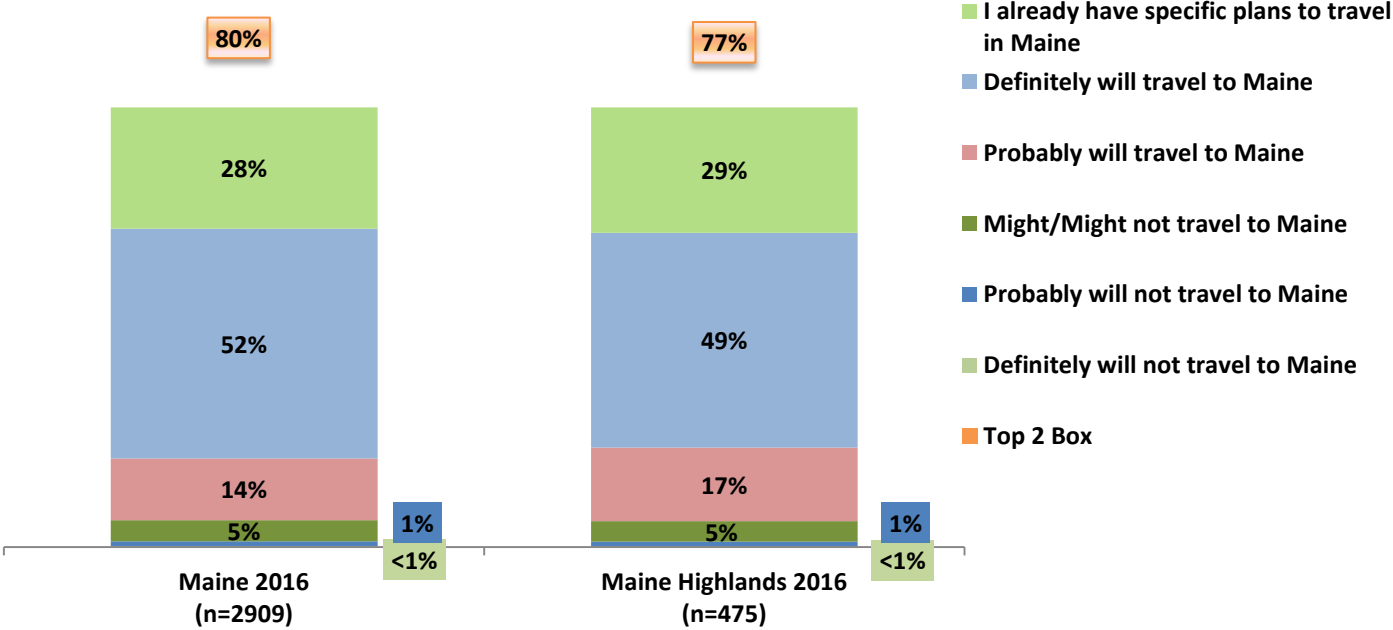
Q29: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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A strong majority of overnight visitors to the Maine Highlands plan to return to Maine in the next two years (77%).

Future Travel Likelihood



Q41. 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 Maine Highlands region average 43 years of age, earning \$83,000 annually. Two in three have a college degree, and 59% are employed full-time.
- Day visitors to the Maine Highlands tourism region are younger than Maine visitors overall.

Day Visitors	Maine 2016 (n=1762)	Maine Highlands 2016 (n=125)
Age:		
< 35	28%	37%
35 - 44	18%	17%
45 - 54	19%	17%
55 +	35%	29%
Mean Age (Years)	<46.0>	42.6
Income:		
< \$50,000	26%	34%
\$50,000 - \$99,999	42%	32%
\$100,000 +	32%	34%
Mean Income	\$88,100	\$83,300
Female	75%	74%
College Degree or Higher	63%	66%
Married	56%	45%
Employed Full-Time	52%	59%

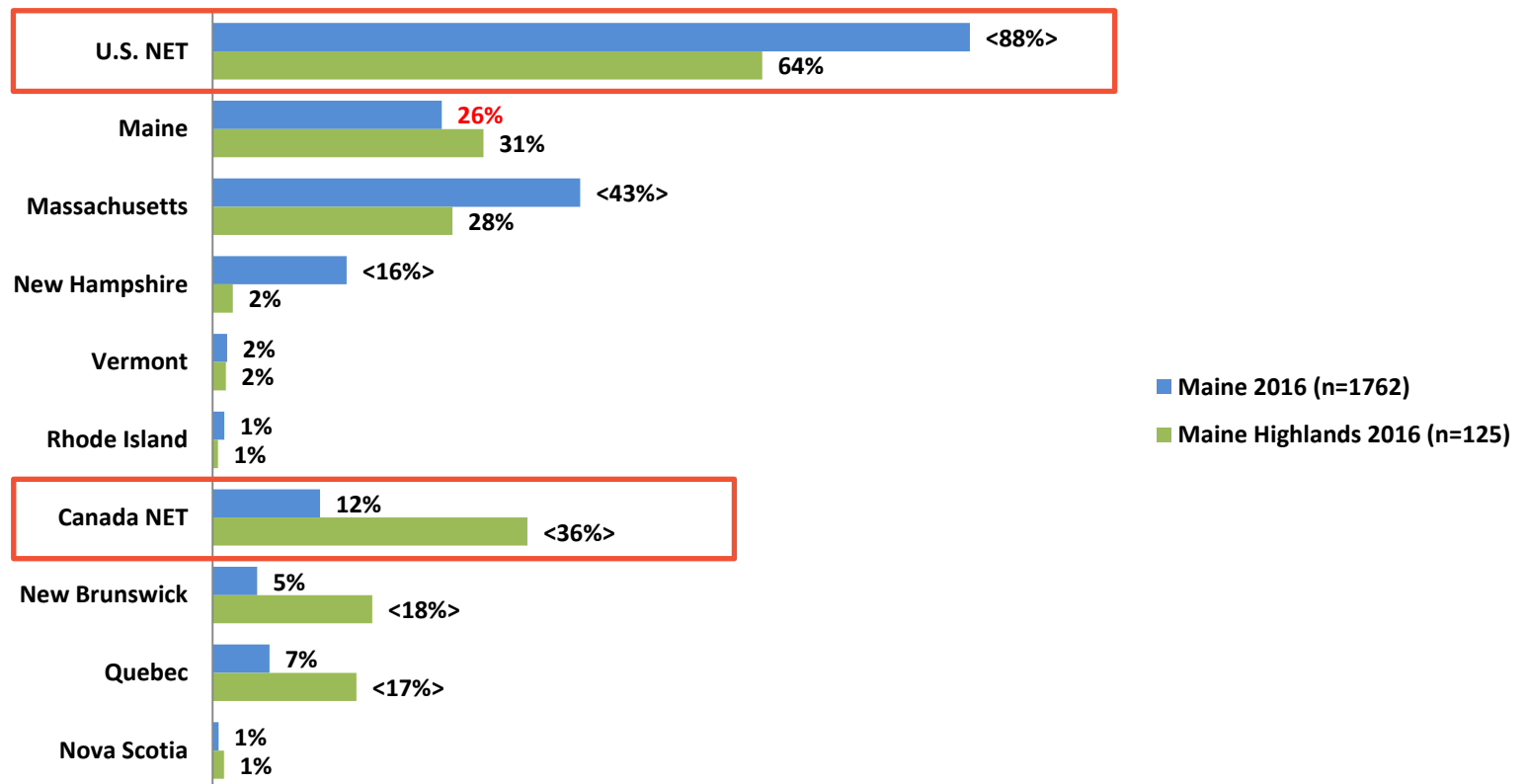
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Two-thirds of day visitors to the Maine Highlands arrive from the United States, while one-third come from Canada.

- As compared to day visitors to the State of Maine as a whole, day visitors to the Maine Highlands region are significantly more likely to arrive from Canada.
- Looking at specific states and provinces, day visitors to the Maine Highlands region are less likely to be from Massachusetts and New Hampshire and more likely to be from New Brunswick and Quebec.

State/ Province of Residence



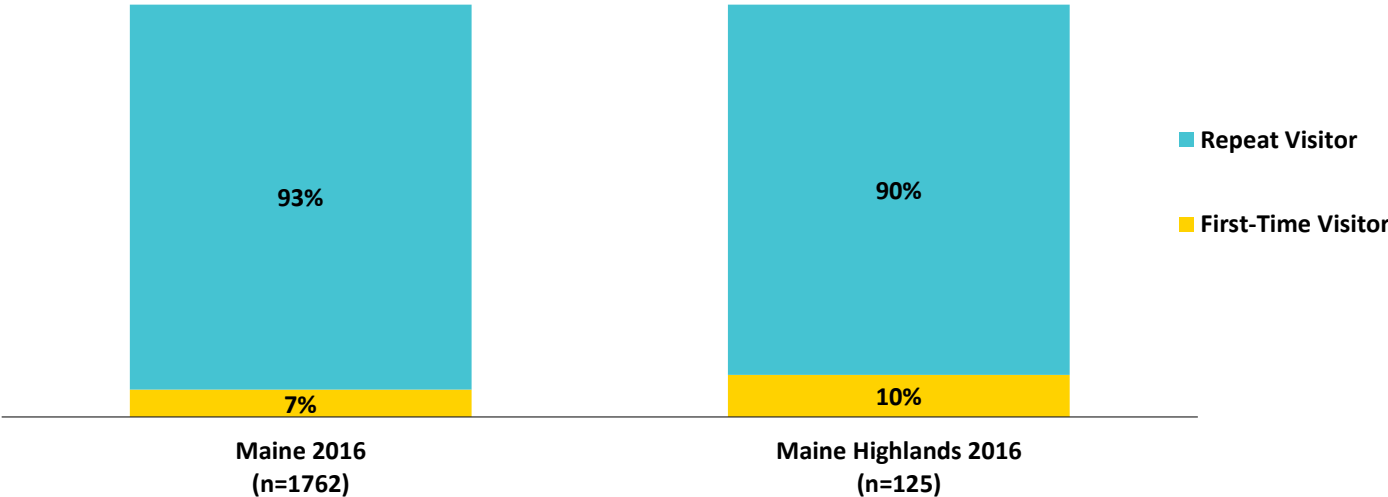
Q2. In what State or Province do you reside?

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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.

Nine in ten day visitors to the Maine Highlands have previously visited Maine.

Repeat vs. First-Time Visitors

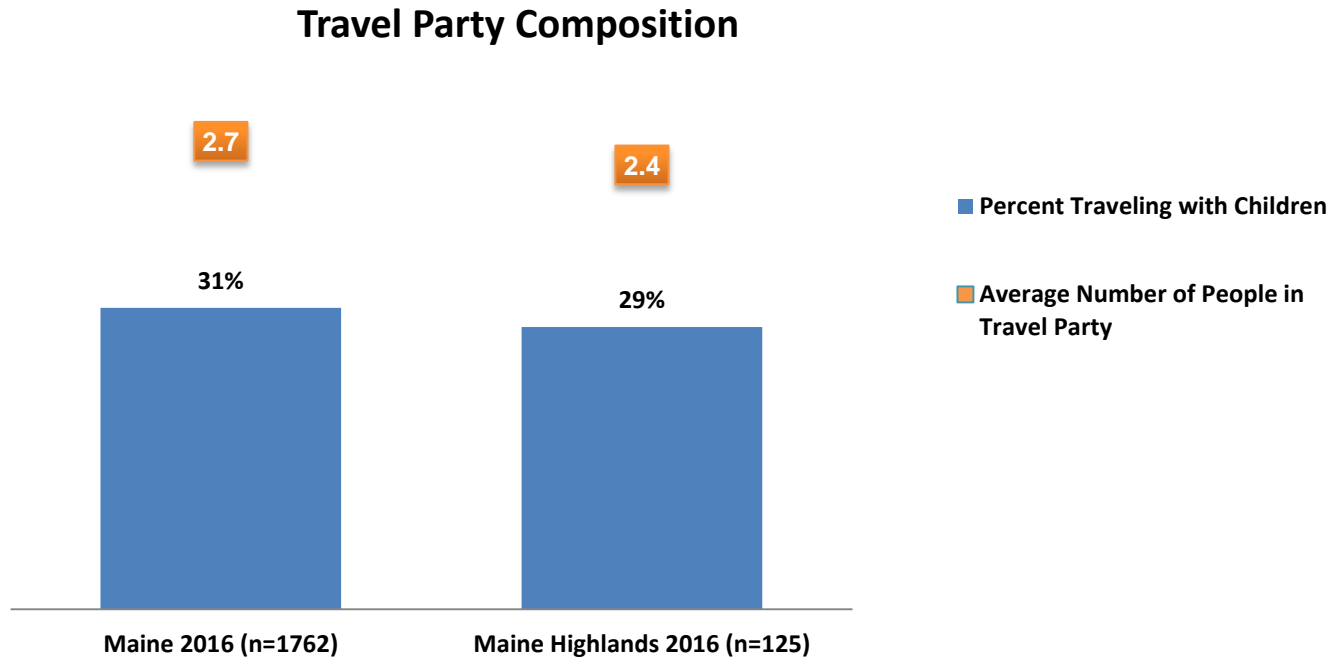


Q10. Was this your first trip to Maine?

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



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

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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.

Day Visitors: Trip Experience

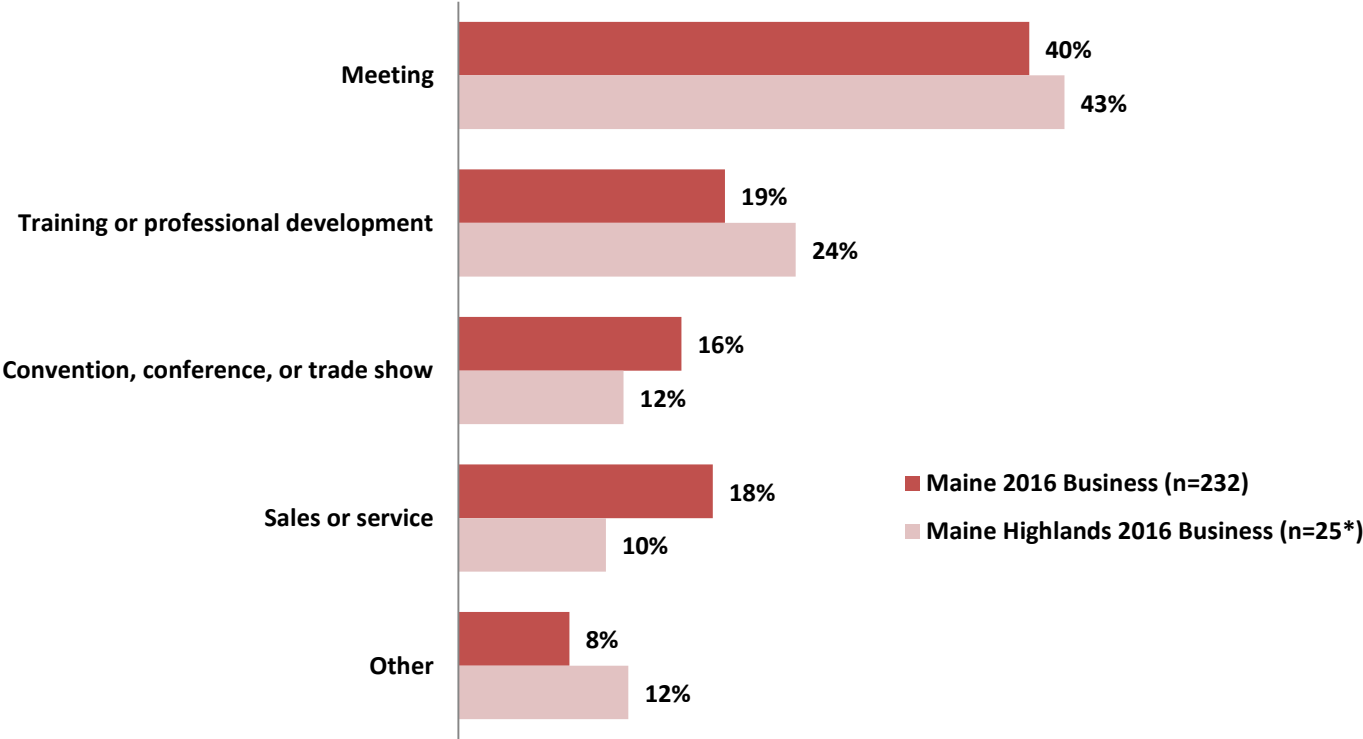
Sample Size Exclusions

Data for some questions is not presented on the following pages because the sample sizes are too small. The results not shown include:

- Trip Activities: History/Culture (n=24)

Two in five business day visitors to the Maine Highlands region are primarily in Maine for a *meeting*.

Primary Purpose of Day Business Trips



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

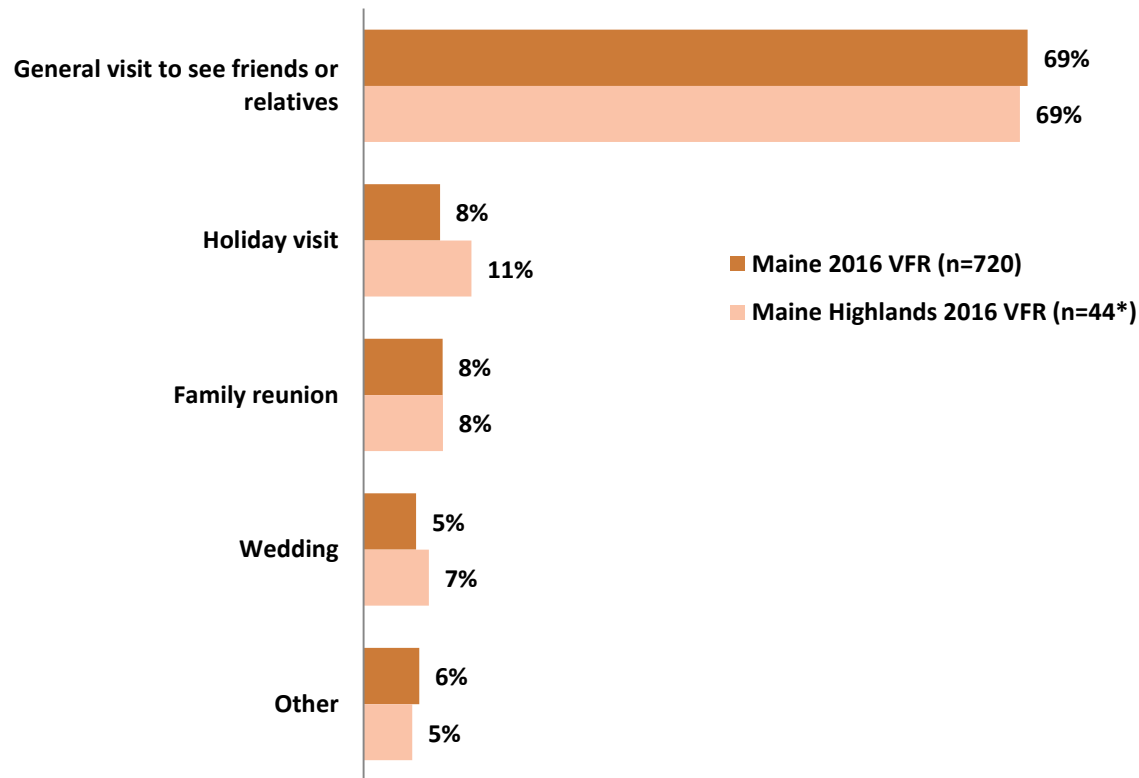
<> indicates a significant difference between subgroups at the 95% confidence level.

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. Use caution when interpreting results.

Seven in ten VFR day visitors cite a *general visit to see friends/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?

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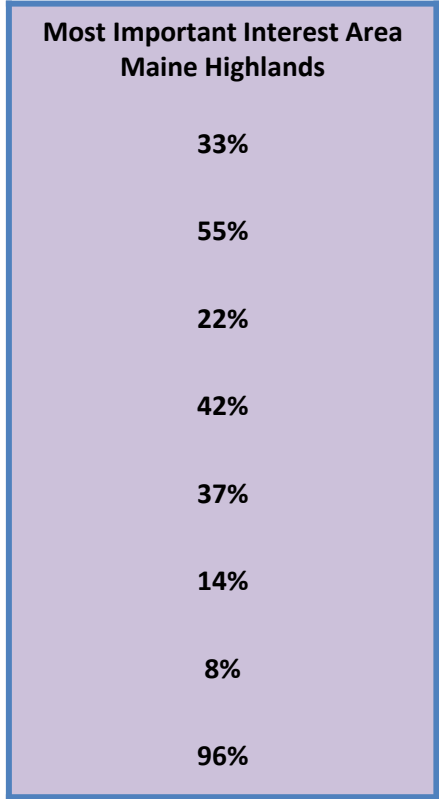
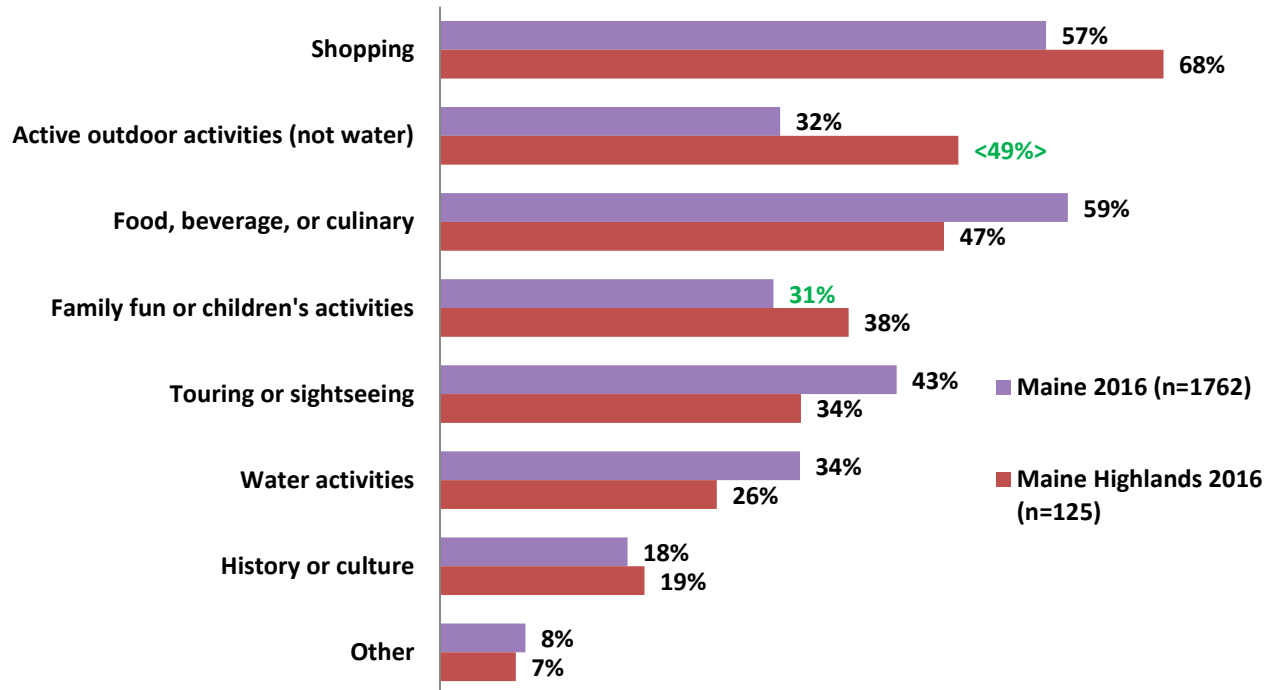
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Shopping is the most common interest area of day visitors to the Maine Highlands region.

- Day visitors to the Maine Highlands region are more likely than day visitors to the State of Maine as a whole to be interested in *active outdoor activities*. In addition, day visitors to the Maine Highlands region in 2016 are more likely than those in 2015 to be interested in *active outdoor activities* (49% versus 33% in 2015).

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

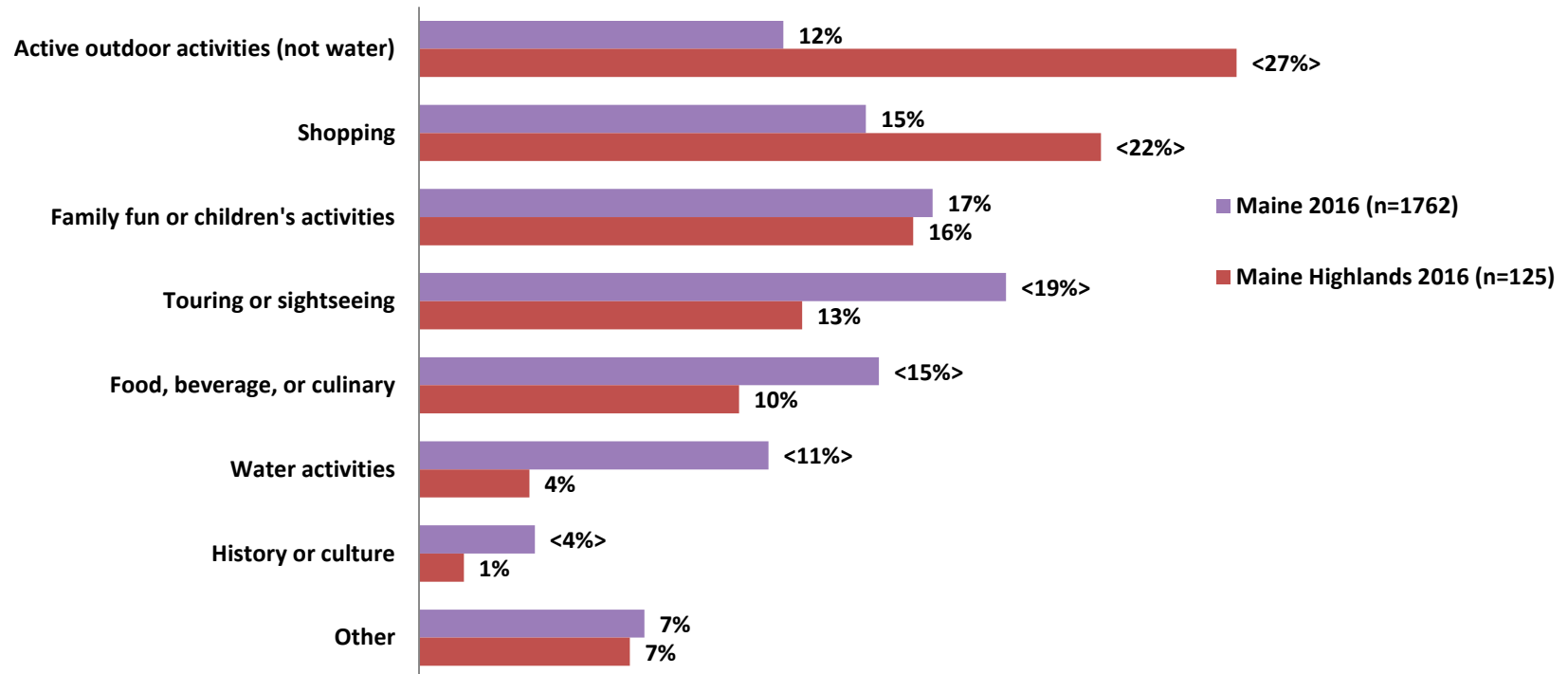
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Active outdoor activities moves to the top ranking among Maine Highlands day visitors when considering both interest and importance together.

- As compared to day visitors to the State as a whole, a much greater proportion of day visitors to the Maine Highlands region rank *active outdoor activities* and *shopping* highly when analyzing both interest and importance. Lesser proportions rank *touring/sightseeing*, *food/beverage/culinary*, *water activities*, and *history/culture* as important in the Maine Highlands region.

**2016 Interest Areas
Travel Driver Index**



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as 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. 35

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

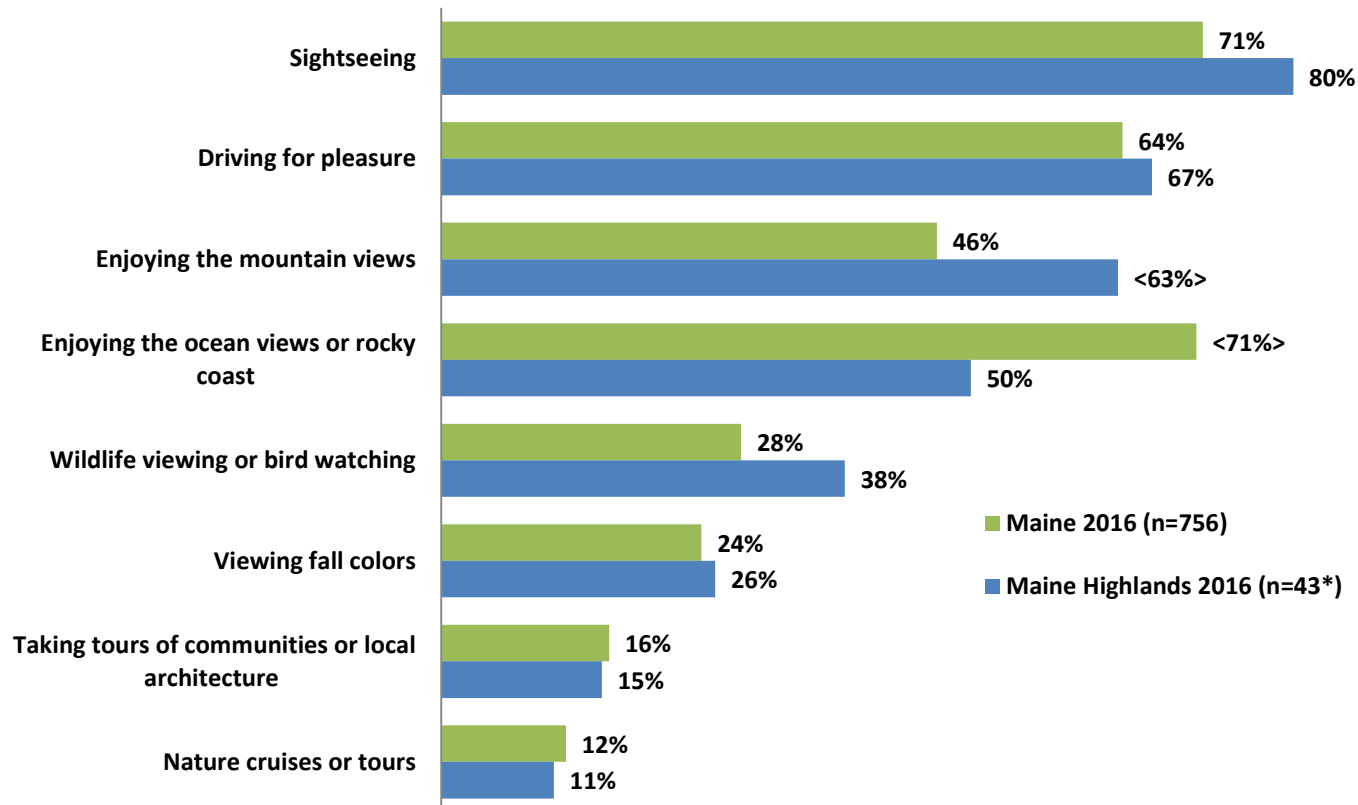
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Day visitors to the Maine Highlands region are more likely to *enjoy the mountain views* while visiting than are day visitors to the State as a whole, and less likely to *enjoy the ocean views or rocky coast*.

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.

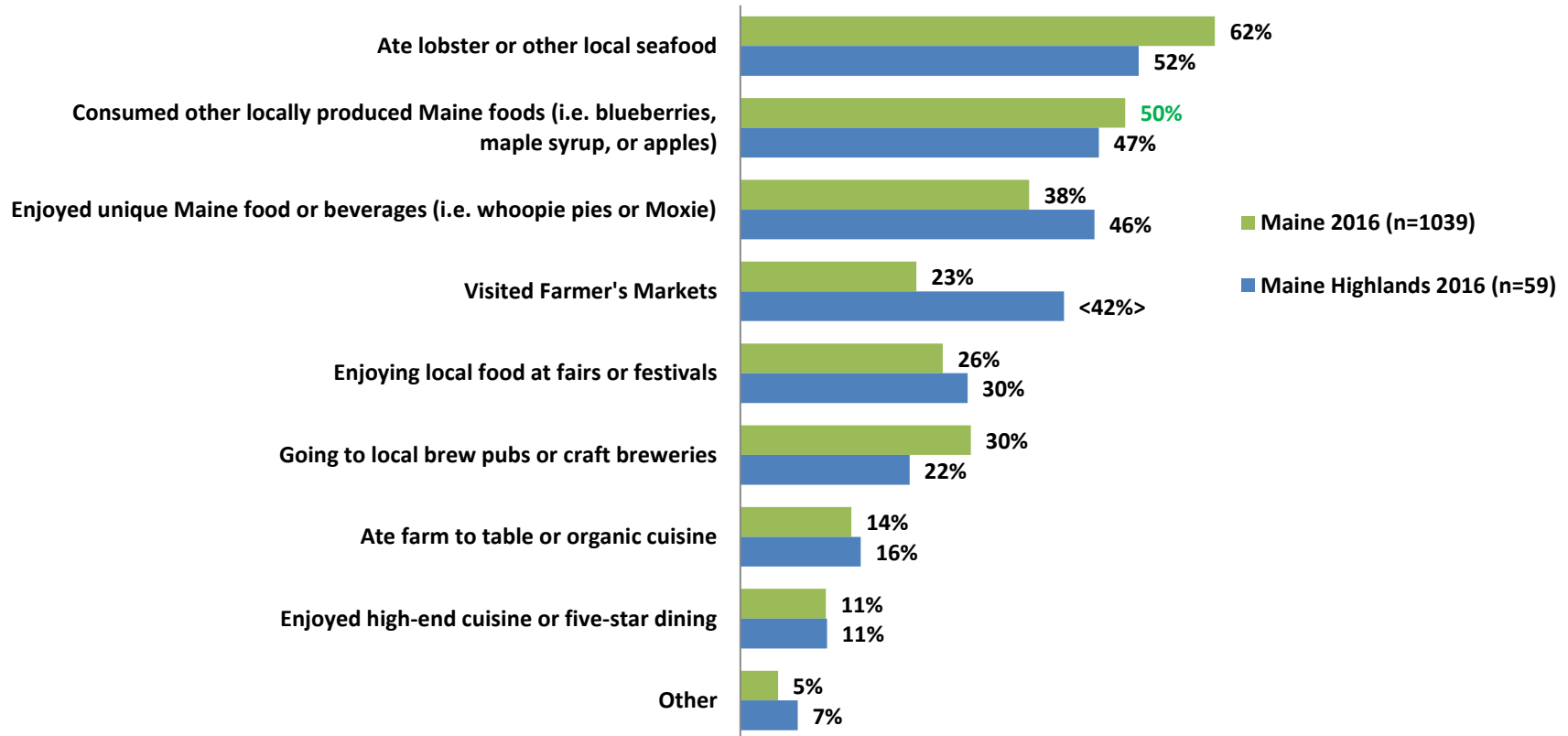
*Please note small sample size. Use caution when interpreting results.

Half of day visitors with food/beverage/culinary interests ate lobster/other local seafood or other locally produced Maine foods while visiting the region.

- Day visitors to the Maine Highlands region are more likely than day visitors to the State as a whole to visit Farmer's Markets while in Maine.

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.

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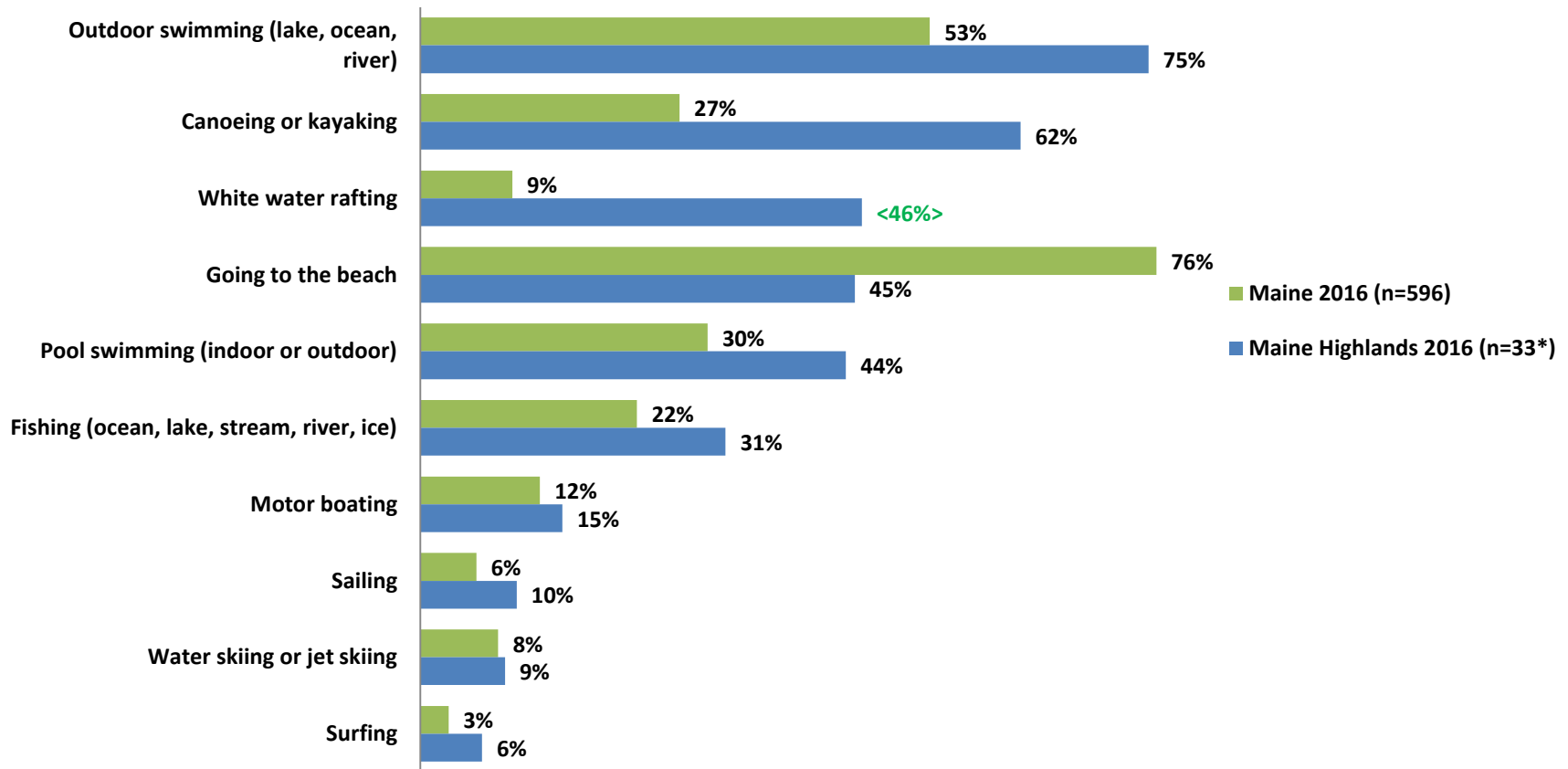
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outdoor swimming and canoeing/kayaking are the most common pursuits of day visitors to the region who are interested in water activities.

- Maine Highlands visitors are significantly more likely to go *white water rafting* compared to Maine visitors overall.

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.*

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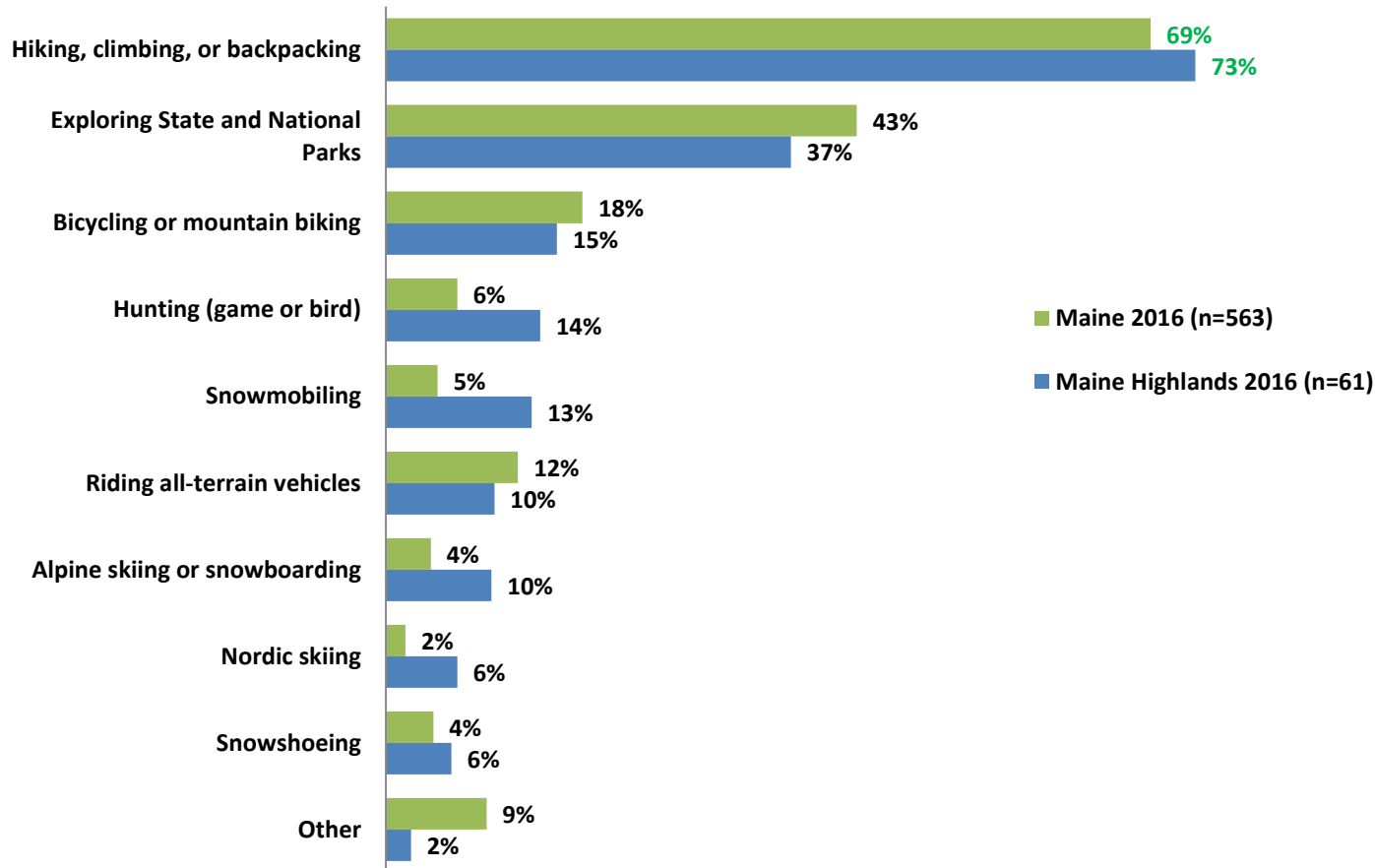
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Three in four Maine Highlands day visitors who are interested in active outdoor activities go *hiking/climbing/backpacking*.

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.*

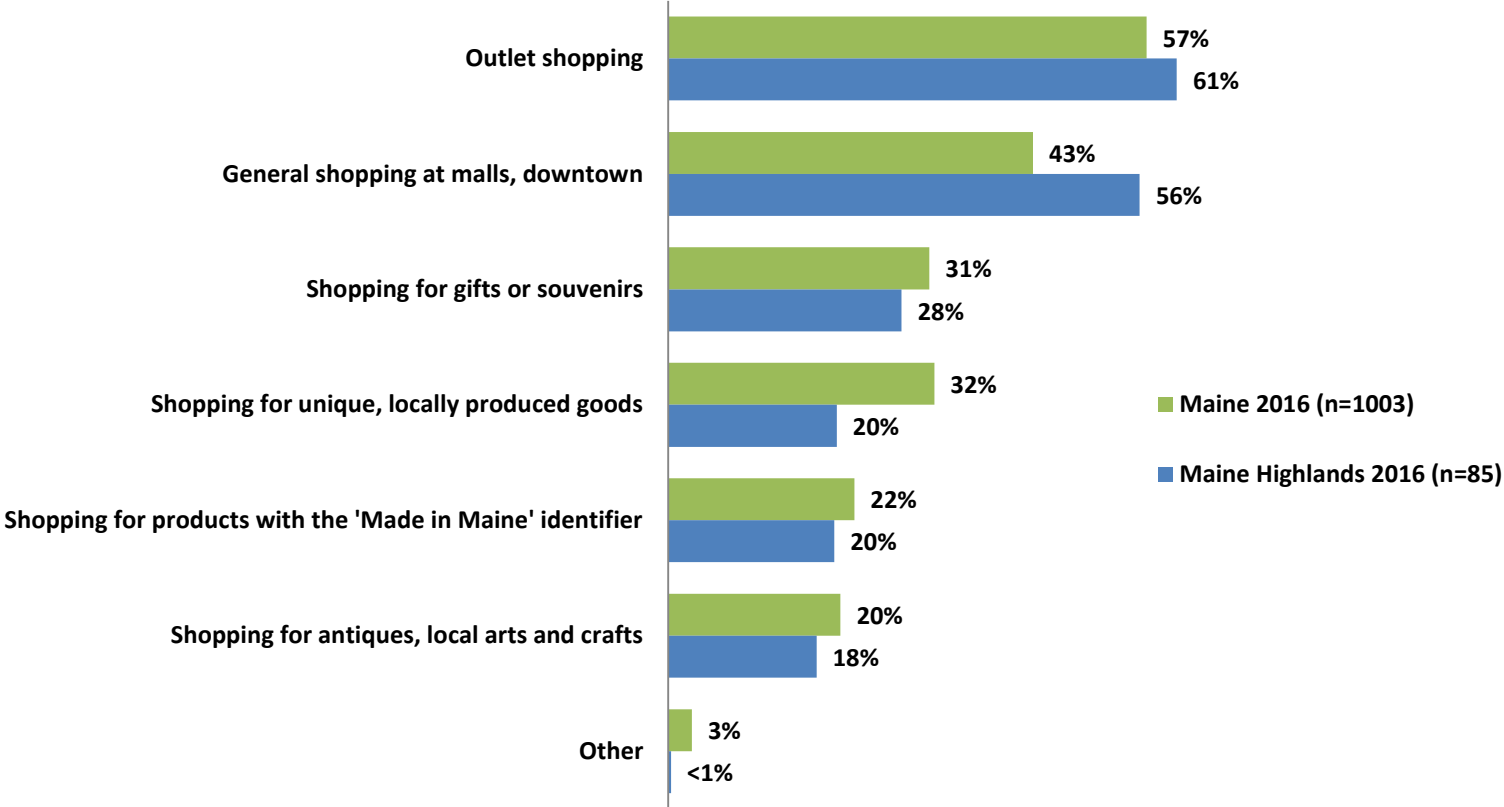
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Among day visitors to this region interested in shopping, more than half did some *outlet shopping* or *general shopping at malls/downtown*.

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.

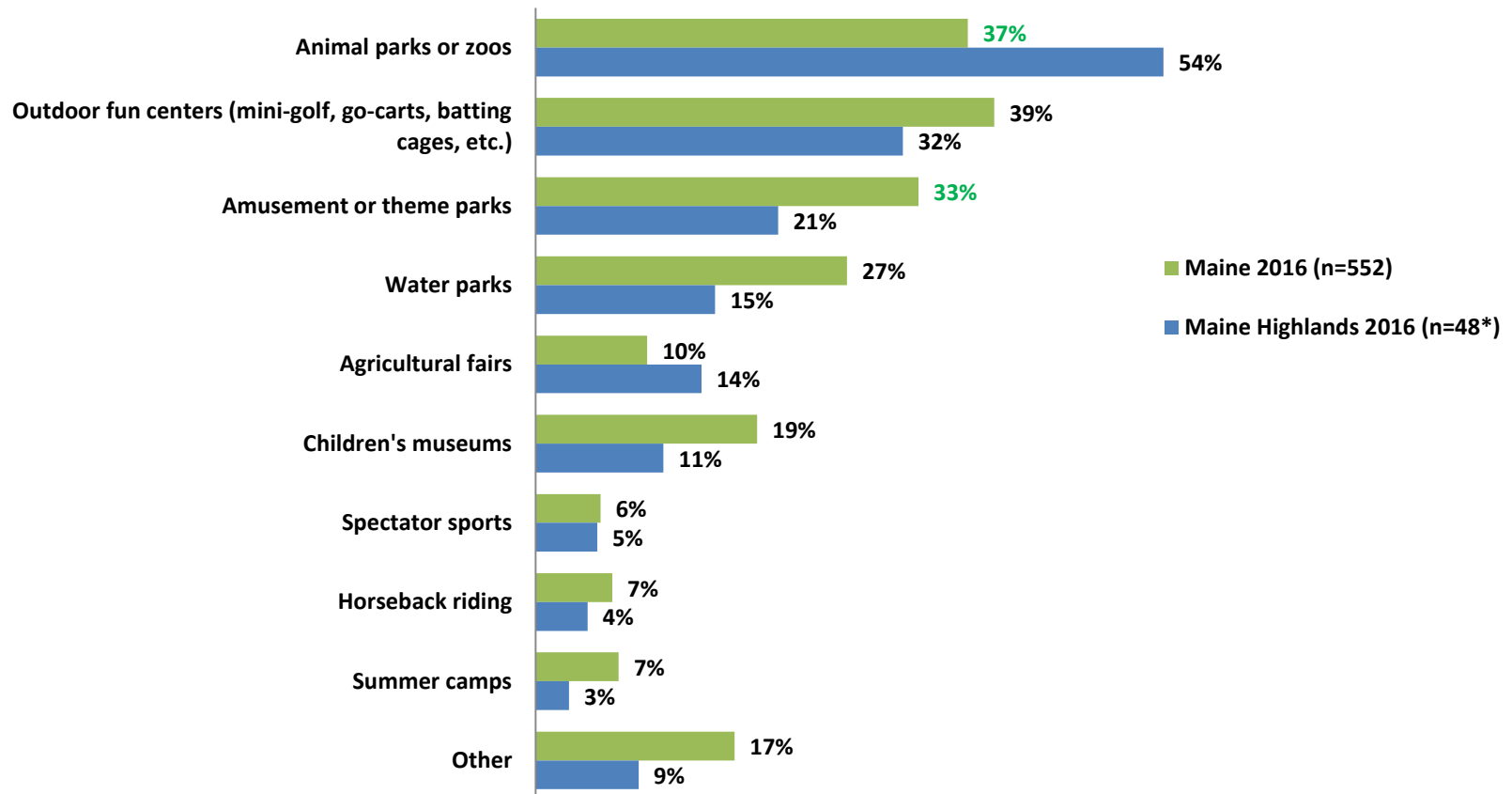
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Animal parks/zoos 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 their Maine trip



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

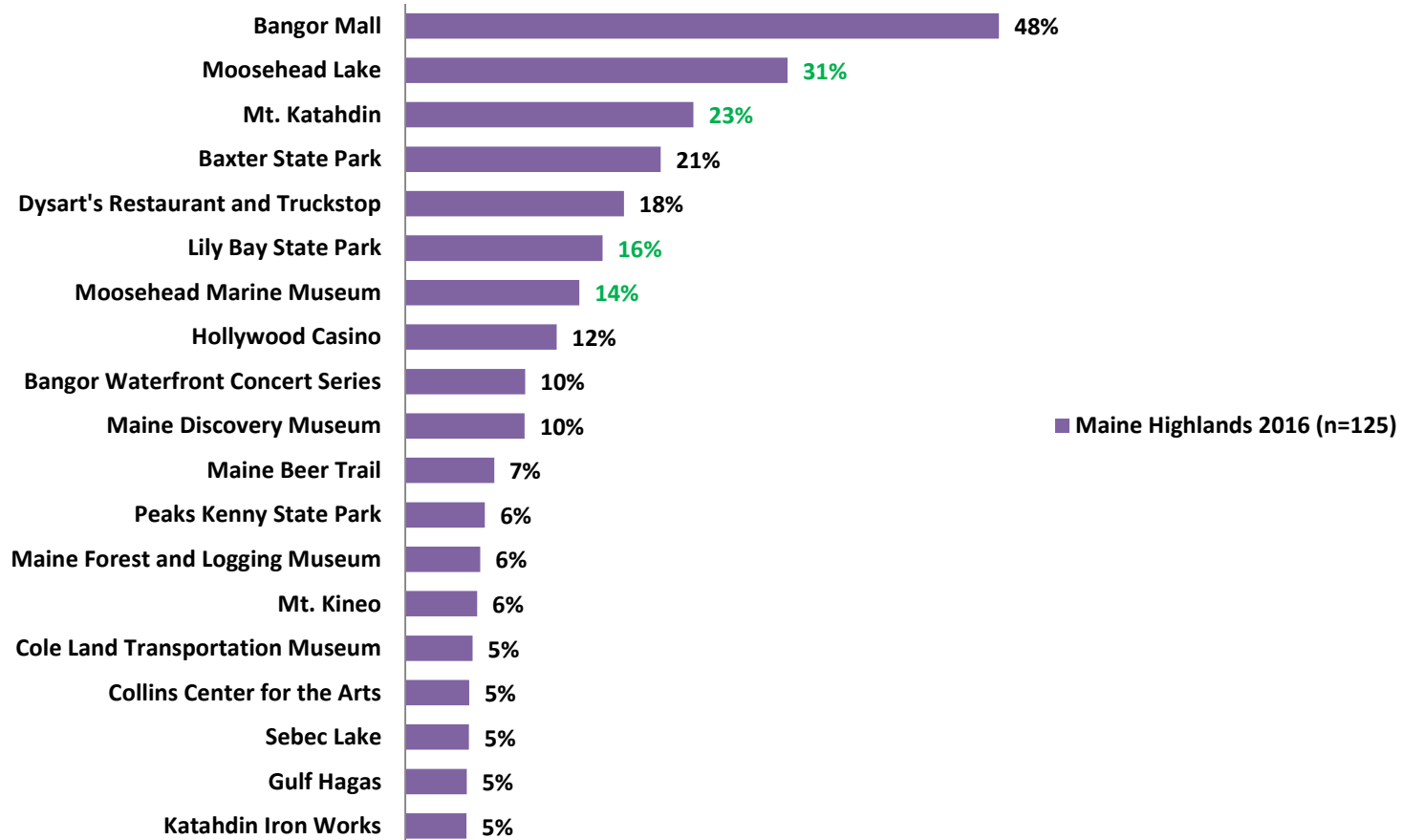
<> indicates a significant difference between subgroups at the 95% confidence level.

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.

Similar to overnight visitors, day visitors to the Maine Highlands region were most likely to have visited the *Bangor Mall*.

Top Attractions/Locations Visited*



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

Q24: 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.

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:
 - Visitor demographics,
 - Visitor origin, and
 - The activities they participate in while visiting.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the entire State, visitors to the Maine Highlands region differ in the following ways:

OVERNIGHT AND DAY VISITORS

A **higher** proportion
of visitors from
Canada

A **lower** proportion
of visitors from the
United States
(specifically **MA**)

DAY VISITORS



A **lower** proportion of visitors
from **NH**

Demographics and Travel Party Composition

OVERNIGHT AND DAY VISITORS



Younger visitors

OVERNIGHT VISITORS



More likely to be first-time visitors

Trip Interest Areas and Travel Driver Index

DAY VISITORS

More likely to want to pursue
active outdoor activities

More likely to place
importance on:
Active outdoor activities
Shopping

Less likely to place
importance on:
Touring/sightseeing
Food/beverage/culinary
Water activities

Trip Activities

OVERNIGHT AND DAY VISITORS

More likely to be:

Enjoying the mountain views
Visiting Farmer's Markets
White water rafting

Less likely to be:

Enjoying the ocean views/rocky coast

Trip Activities

OVERNIGHT VISITORS

More likely to be:

Viewing fall colors
Participating in general shopping
at malls/downtown
Wildlife viewing/bird watching
Attending operas/classical music
events

Less likely to be:

Eating lobster or other local
seafood
Consuming other locally produced
Maine foods
Going to the beach
Bicycling or mountain biking



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