Maine Office of Tourism
Visitor Tracking Research
2016 Calendar Year Annual Report
Regional Insights:
Maine Lakes & Mountains

Prepared by

dpa

providing direction
in travel & tourism

April 2017

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

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Research Objectives and Methodology

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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

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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 <u>statewide</u> 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 Lakes & Mountains** tourism region during 2016, including:

  - 351 overnight visitors, and

  - 160 day visitors.

- Throughout this report, data for the **Maine Lakes & Mountains** 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 Lakes & Mountains 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 Lakes & Mountains tourism region are 42 years old, on average, and have annual household incomes around $97,000. Two-thirds have at least a college degree or are employed full-time. Half are married.

Overnight Visitors	Maine 2016 (n=2909)	Maine Lakes & Mountains 2016 (n=351)
Age:		
< 35	34%	35%
35 - 44	22%	27%
45 - 54	18%	18%
55 +	<26%>	21%
Mean Age (Years)	42.8	41.6
Income:		
< $50,000	20%	20%
$50,000 - $99,999	42%	43%
$100,000 +	39%	37%
Mean Income	$98,700	$96,800
Female	60%	61%
College Degree or Higher	66%	67%
Married	56%	53%
Employed Full-Time	66%	67%

<> 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.

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Nine in ten overnight visitors to the Maine Lakes & Mountains region come from the United States.

- Overnight visitors to the Lakes & Mountains region are <u>less</u> likely than visitors to the State as a whole to come from New England, and <u>more</u> likely to come from the Mid-Atlantic region.

- Looking at specific states of origin, Lakes & Mountains visitors are less likely than Maine visitors overall to be from Massachusetts or New Hampshire, and more likely to be from Pennsylvania.
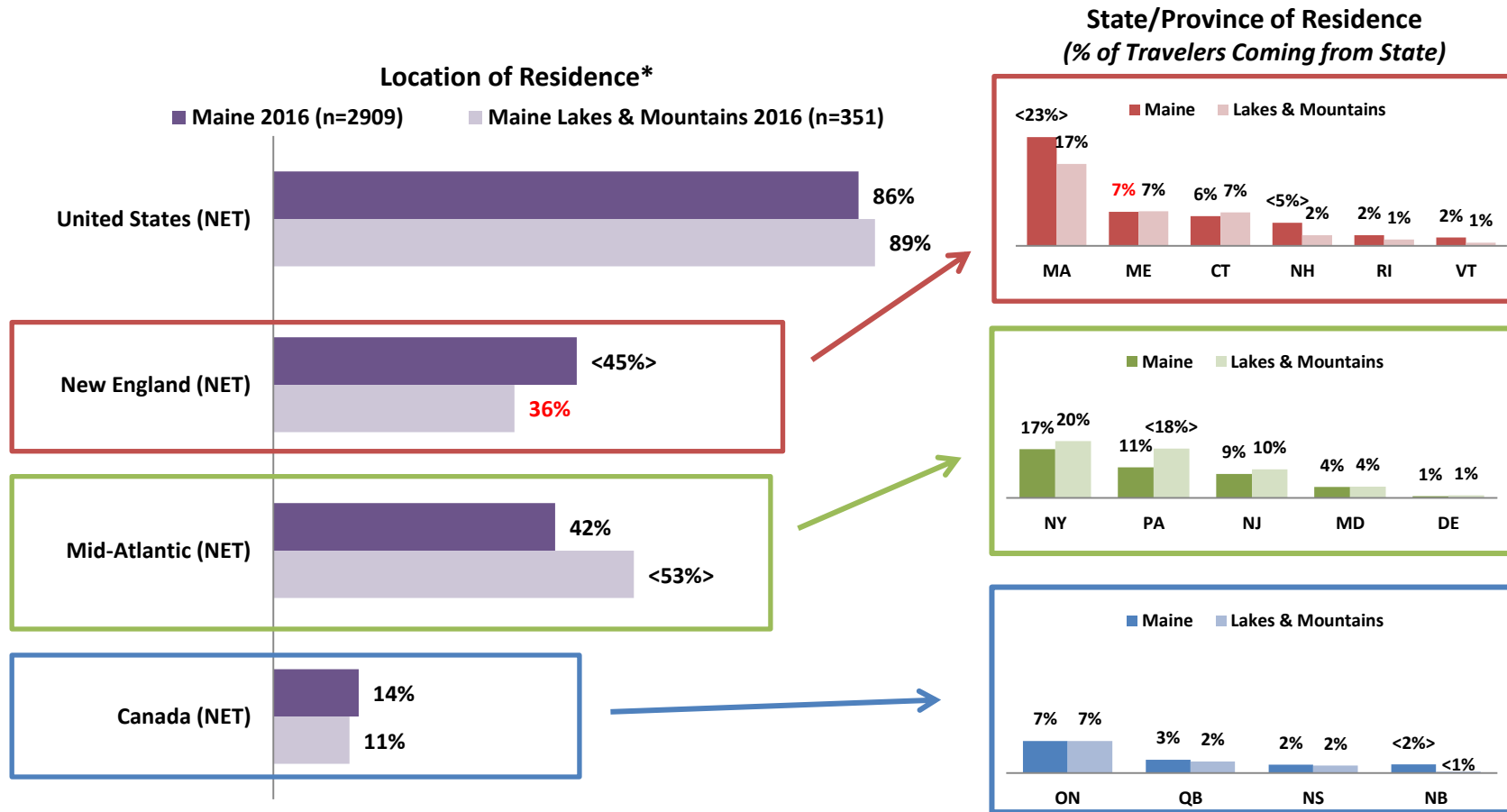
State/Province of Residence
(% of Travelers Coming from State)

Location of Residence*

■ **Maine 2016 (n=2909)**   ■ **Maine Lakes & Mountains 2016 (n=351)**

United States (NET)
86%
89%

New England (NET)
<45%>
36%

Mid-Atlantic (NET)
42%
<53%>

Canada (NET)
14%
11%

■ Maine   ■ Lakes & Mountains

<23%> 17%   7% 7%   6% 7%   <5%> 2%   2% 1%   2% 1%
MA   ME   CT   NH   RI   VT

■ Maine   ■ Lakes & Mountains

17% 20%   11% <18%>   9% 10%   4% 4%   1% 1%
NY   PA   NJ   MD   DE

■ Maine   ■ Lakes & Mountains

7% 7%   3% 2%   2% 2%   <2%> <1%>
ON   QB   NS   NB

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Three in ten overnight visitors to the Lakes & Mountains region are first-time visitors to Maine.

- Overnight visitors to the Lakes & Mountains region are more likely than visitors to the State overall to be visiting for the first time.

Repeat vs. First-Time Visitors

Repeat Visitor (teal)
First-Time Visitor (yellow)

Maine 2016: <77%> Repeat, 23% First-Time
(n=2909)

Maine Lakes & Mountains 2016: 70% Repeat, <30%> First-Time
(n=351)

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.

Two in five overnight visitors to the Lakes & Mountains region are traveling with children.

- Overnight visitors to this region are more likely to be traveling with children, as compared to overnight visitors to the State of Maine as a whole.

Travel Party Composition

- Percent Traveling with Children
- Average Number of People in Travel Party

Q21. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
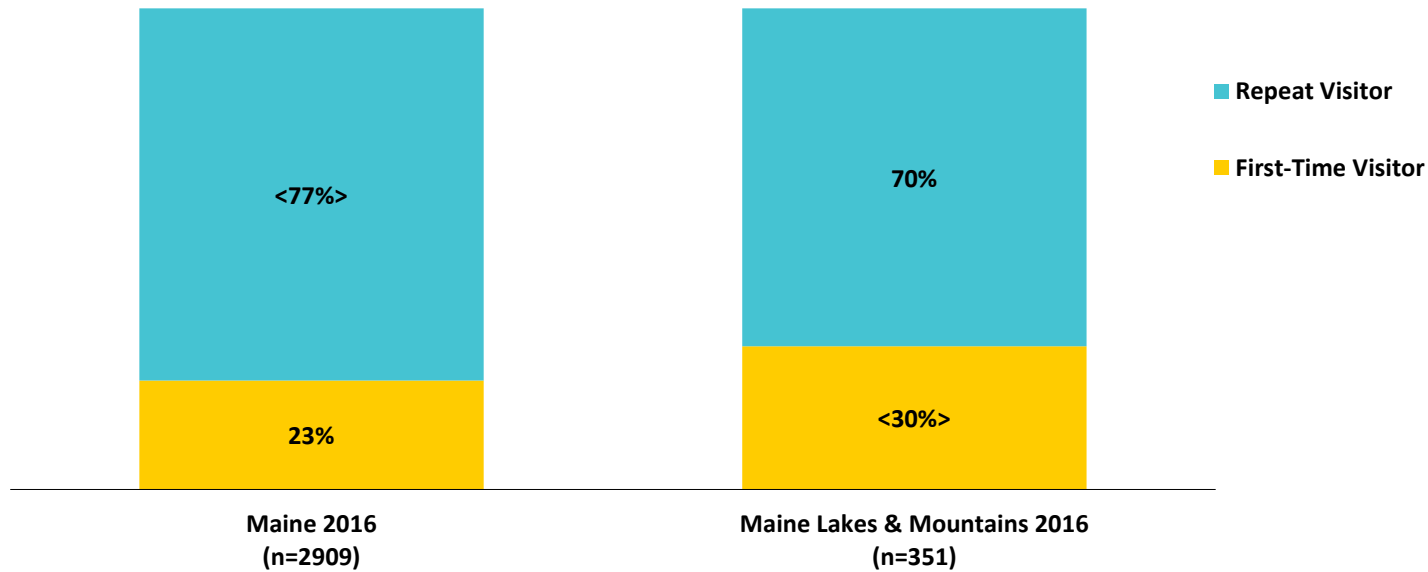Q22. How many of these people were: Children?
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors:
Trip Experience

Overnight business trips to the Maine Lakes & Mountains region are most likely for a *meeting*.

Primary Purpose of Overnight Business Trips

Meeting — 34% / 37%

Training or professional development — 23% / 24%

Sales or service — 19% / 20%

Convention, conference, or trade show — 22% / 19%

Other — 2% / 1%

■ Maine 2016 Business (n=524)

■ Maine Lakes & Mountains 2016 Business (n=53)
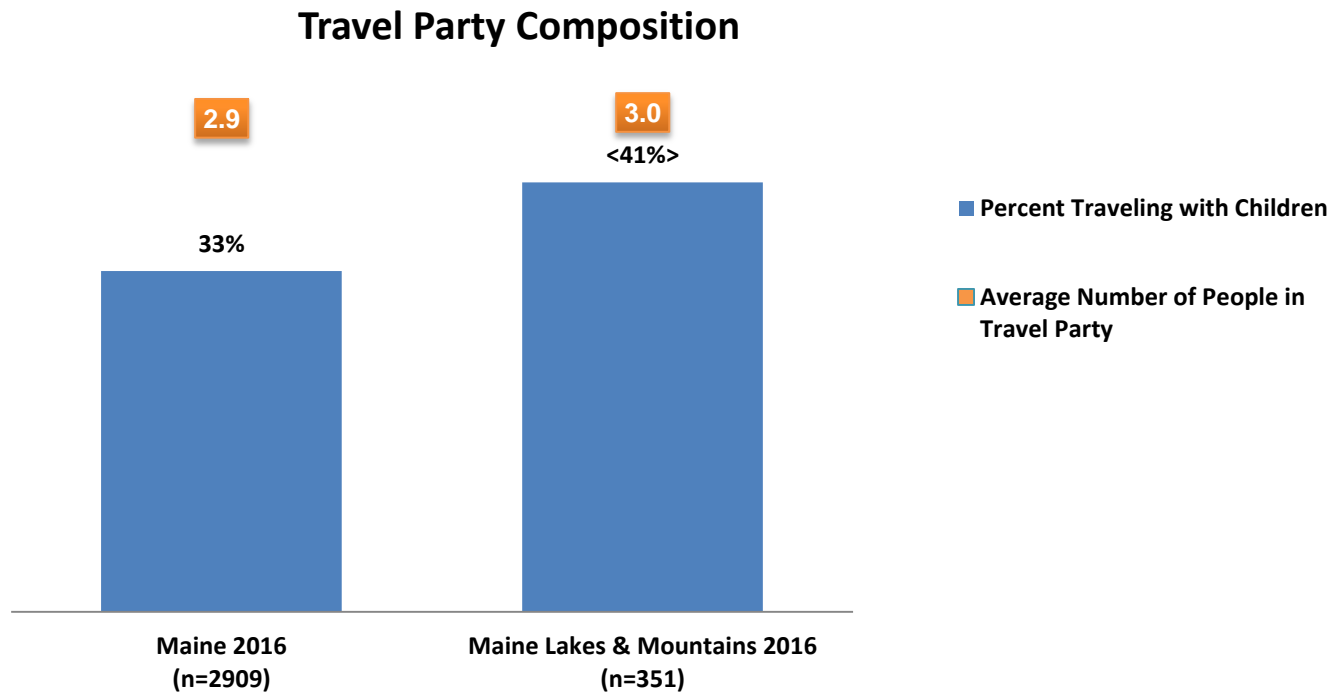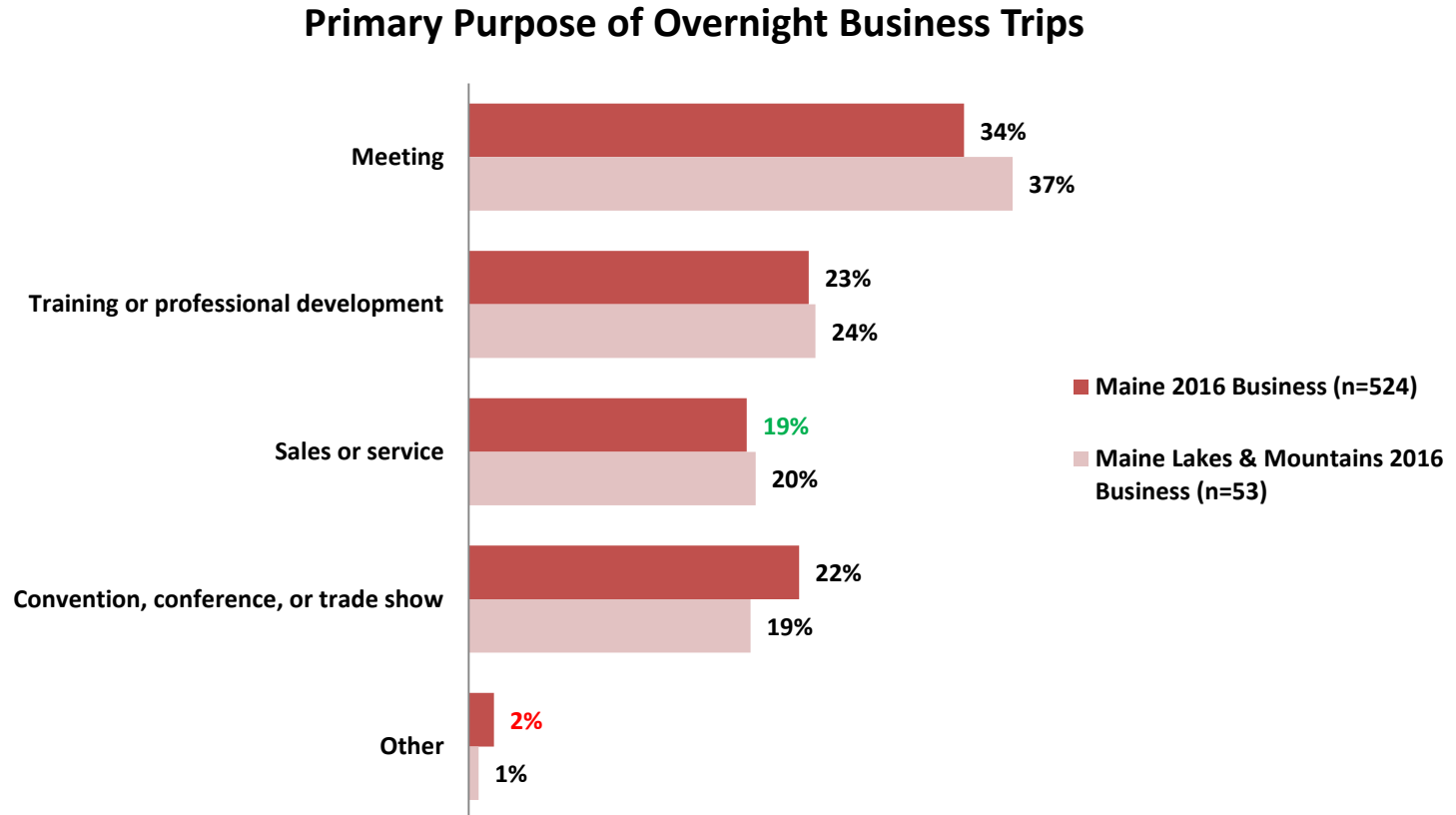
Q8. What was the primary purpose of your most recent business trip in Maine?
<> indicates a significant difference between subgroups at the 95% confidence level.
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Overnight VFR travelers in this region most often cite a *general visit to see friends/relatives* as the primary purpose of their trip.

Primary Purpose of Overnight VFR Trips

Purpose	Maine 2016 VFR (n=1168)	Maine Lakes & Mountains 2016 VFR (n=179)
General visit to see friends or relatives	61%	59%
Wedding	12%	12%
Family reunion	9%	11%
Holiday visit	11%	7%
Funeral	3%	3%
Class reunion	1%	2%
Other, please specify:	4%	6%

■ Maine 2016 VFR (n=1168)
■ Maine Lakes & Mountains 2016 VFR (n=179)

Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
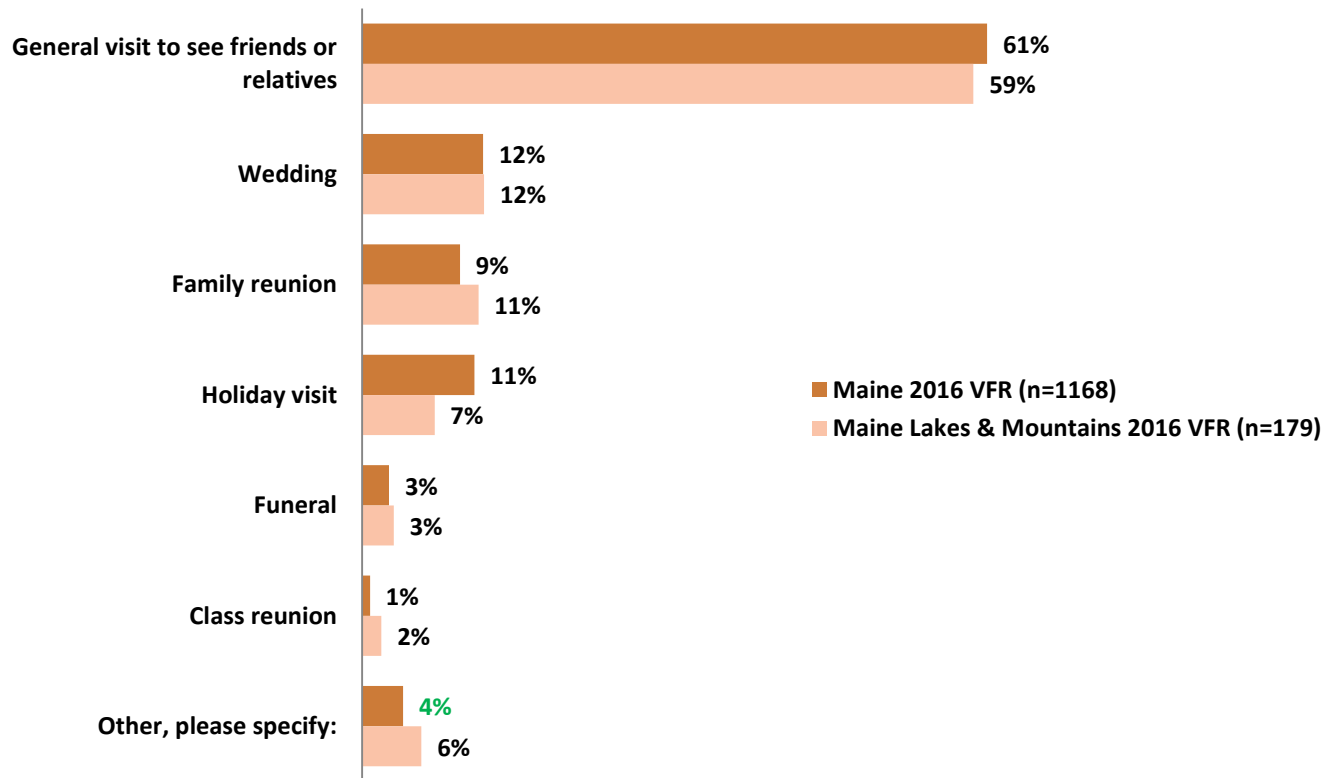<> indicates a significant difference between subgroups at the 95% confidence level.
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Food/beverage/culinary and *touring/sightseeing* interests are the most common travel interest areas among overnight visitors to the Lakes & Mountains region.

- Although *food/beverage/culinary* activities are among the most common areas of interest for overnight visitors to the Maine Lakes & Mountains (along with *touring/sightseeing*), visitors to this region are less likely than visitors to the State overall to be interested in these activities. Lakes & Mountains visitors are also less likely to be interested in *shopping*.

- Overnight visitors to the Lakes & Mountains region are more likely to have an interest in *active outdoor activities* than are overnight visitors to the State as a whole.

2016 Interest Areas

Interest Area	Maine 2016 (n=2909)	Maine Lakes & Mountains 2016 (n=351)
Food, beverage, or culinary	<59%>	48%
Touring or sightseeing	48%	48%
Shopping	<51%>	43%
Active outdoor activities (not water)	34%	<41%>
History or culture	30%	35%
Family fun or children's activities	29%	33%
Water activities	28%	32%
Other	4%	6%

Most Important Interest Area Maine Lakes & Mountains

Interest Area	%
Food, beverage, or culinary	24%
Touring or sightseeing	51%
Shopping	10%
Active outdoor activities (not water)	37%
History or culture	24%
Family fun or children's activities	48%
Water activities	44%
Other	94%

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.
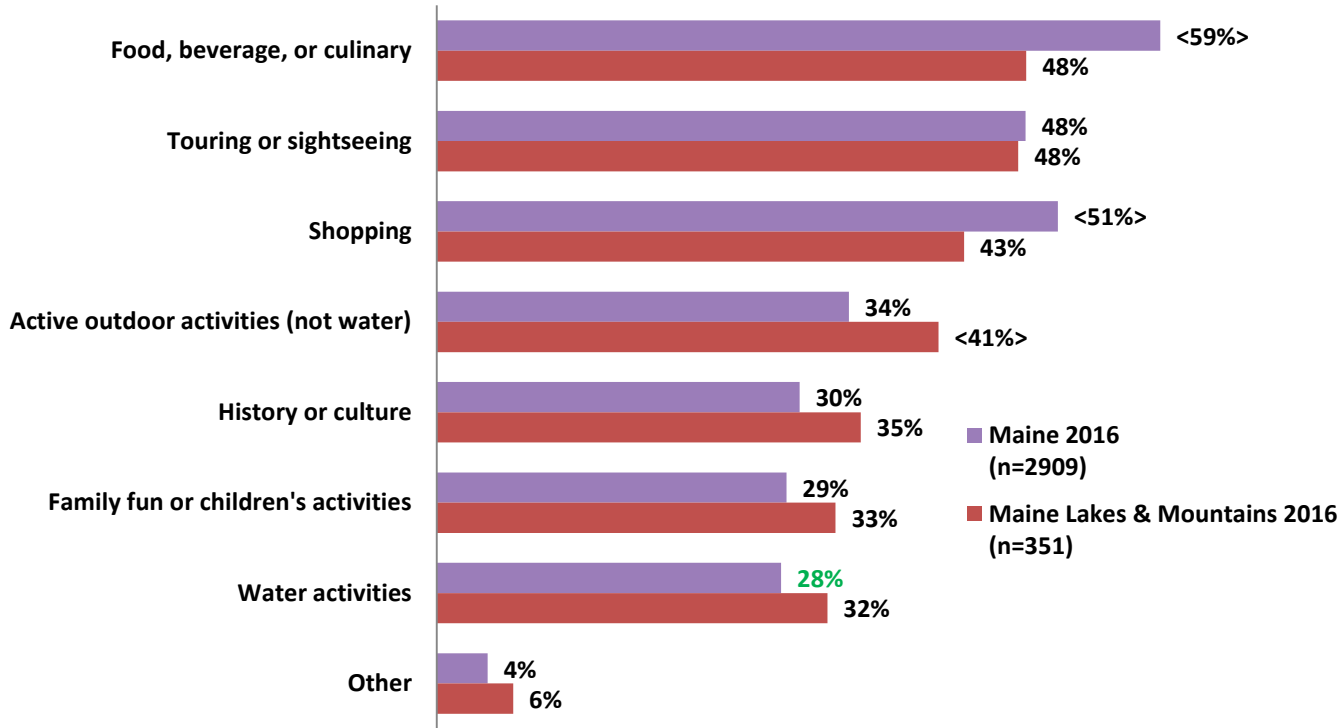<> indicates a significant difference between subgroups at the 95% confidence level.
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When considering both interest and importance in deciding to visit, *touring/sightseeing* ranks highest among overnight visitors to this region.

- Some interest areas are <u>more</u> important for overnight visitors to the Lakes & Mountains region than for the State as a whole – *active outdoor activities* and *water activities*. *Food/beverage/culinary* and *shopping* activities are ranked <u>lower</u> among visitors to this region than among visitors to Maine overall.

2016 Interest Areas
Travel Driver Index

Interest Area	Maine 2016 (n=2909)	Maine Lakes & Mountains 2016 (n=351)
Touring or sightseeing	25%	24%
Family fun or children's activities	13%	16%
Active outdoor activities (not water)	11%	<15%>
Water activities	9%	<14%>
Food, beverage, or culinary	<21%>	12%
History or culture	7%	8%
Shopping	<11%>	4%
Other	4%	6%

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

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Enjoying mountain views and *sightseeing* are the most common touring/sightseeing activities among overnight visitors to the region.

- Overnight visitors to the Lakes & Mountains region are <u>more</u> likely than overnight visitors to the State as a whole to spend time *enjoying the mountain views*, and <u>less</u> 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

Activity	Maine 2016 (n=1407)	Maine Lakes & Mountains 2016 (n=168)
Enjoying the mountain views	51%	<76%>
Sightseeing	71%	67%
Driving for pleasure	56%	58%
Enjoying the ocean views or rocky coast	<65%>	52%
Wildlife viewing or bird watching	28%	38%
Taking tours of communities or local architecture	21%	24%
Viewing fall colors	23%	24%
Nature cruises or tours	16%	18%

■ Maine 2016 (n=1407)
■ Maine Lakes & Mountains 2016 (n=168)

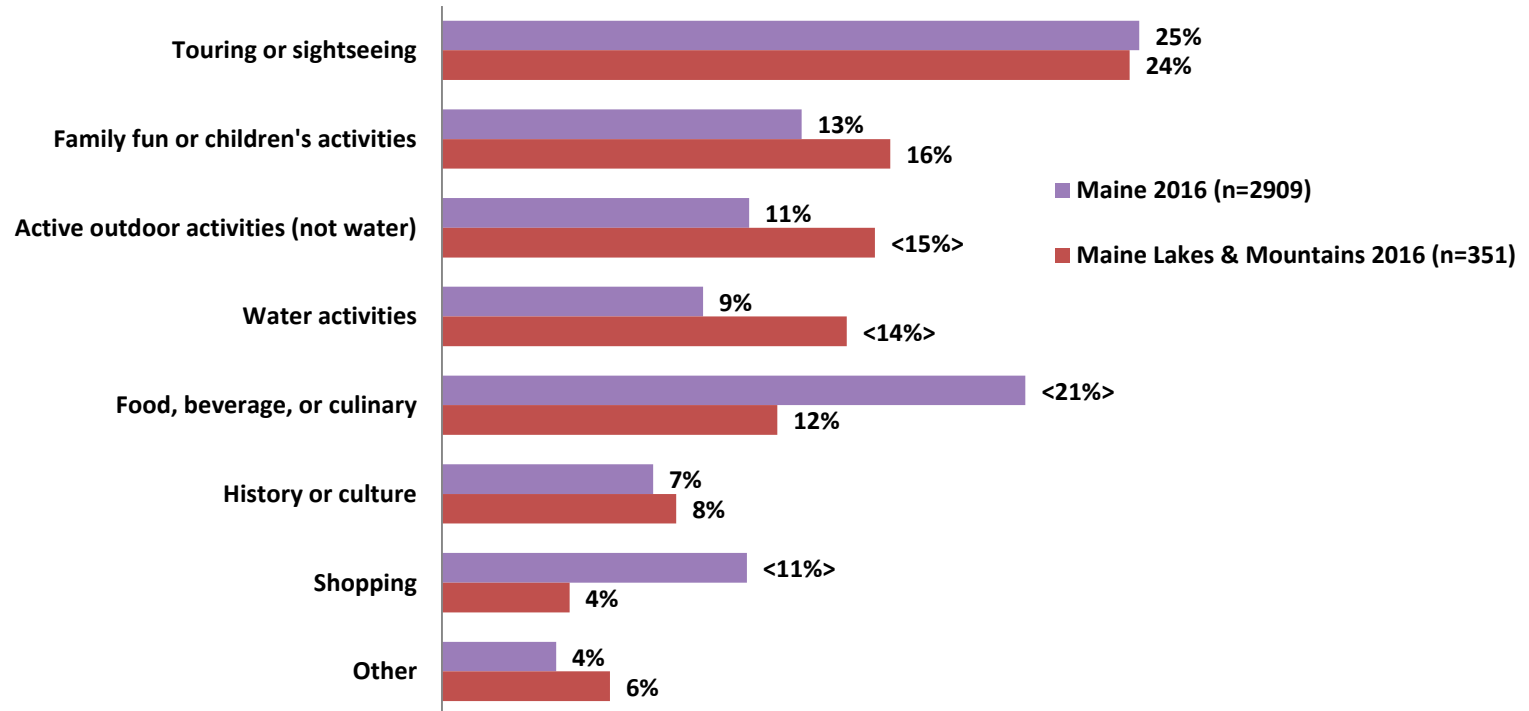Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
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The top food/beverage/culinary activity among overnight visitors to this region is *eating lobster or other local seafood.*

- Visitors to this region are <u>more</u> likely than visitors to the State overall to *visit Farmer's Markets* while in the area.

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

Activity	Maine 2016 (n=1729)	Maine Lakes & Mountains 2016 (n=170)
Ate lobster or other local seafood	62%	59%
Consumed other locally produced Maine foods (i.e. blueberries, maple syrup, or apples)	42%	49%
Enjoyed unique Maine food or beverages (i.e. whoopie pies or Moxie)	40%	45%
Visited Farmer's Markets	28%	<37%>
Going to local brew pubs or craft breweries	36%	34%
Enjoying local food at fairs or festivals	27%	33%
Ate farm to table or organic cuisine	18%	20%
Enjoyed high-end cuisine or five-star dining	20%	18%
Other, please specify:	2%	<1%

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
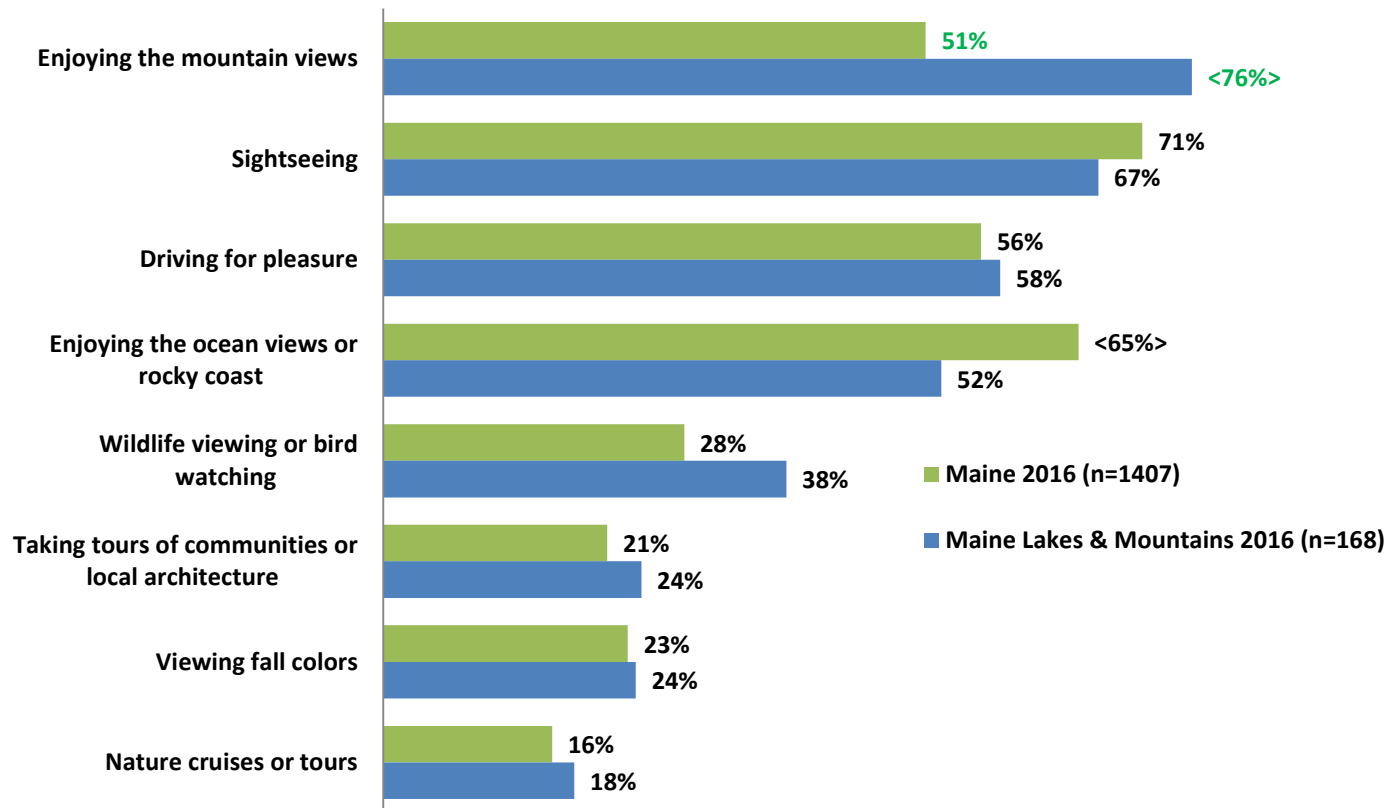<> indicates a significant difference between subgroups at the 95% confidence level.
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Outdoor swimming and *going to the beach* are pursued by roughly half of overnight visitors to the Lakes & Mountains region who are interested in water activities.

- *Going to the beach* is <u>less</u> popular in this region than it is in the State of Maine overall.

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

Activity	Maine 2016 (n=823)	Maine Lakes & Mountains 2016 (n=113)
Outdoor swimming (lake, ocean, river)	45%	53%
Going to the beach	<60%>	46%
Canoeing or kayaking	28%	39%
Fishing (ocean, lake, stream, river, ice)	28%	31%
Pool swimming (indoor or outdoor)	34%	30%
Water skiing or jet skiing	12%	20%
Motor boating	14%	20%
Sailing	12%	17%
White water rafting	10%	9%
Surfing	5%	4%
Other, please specify:	1%	1%

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
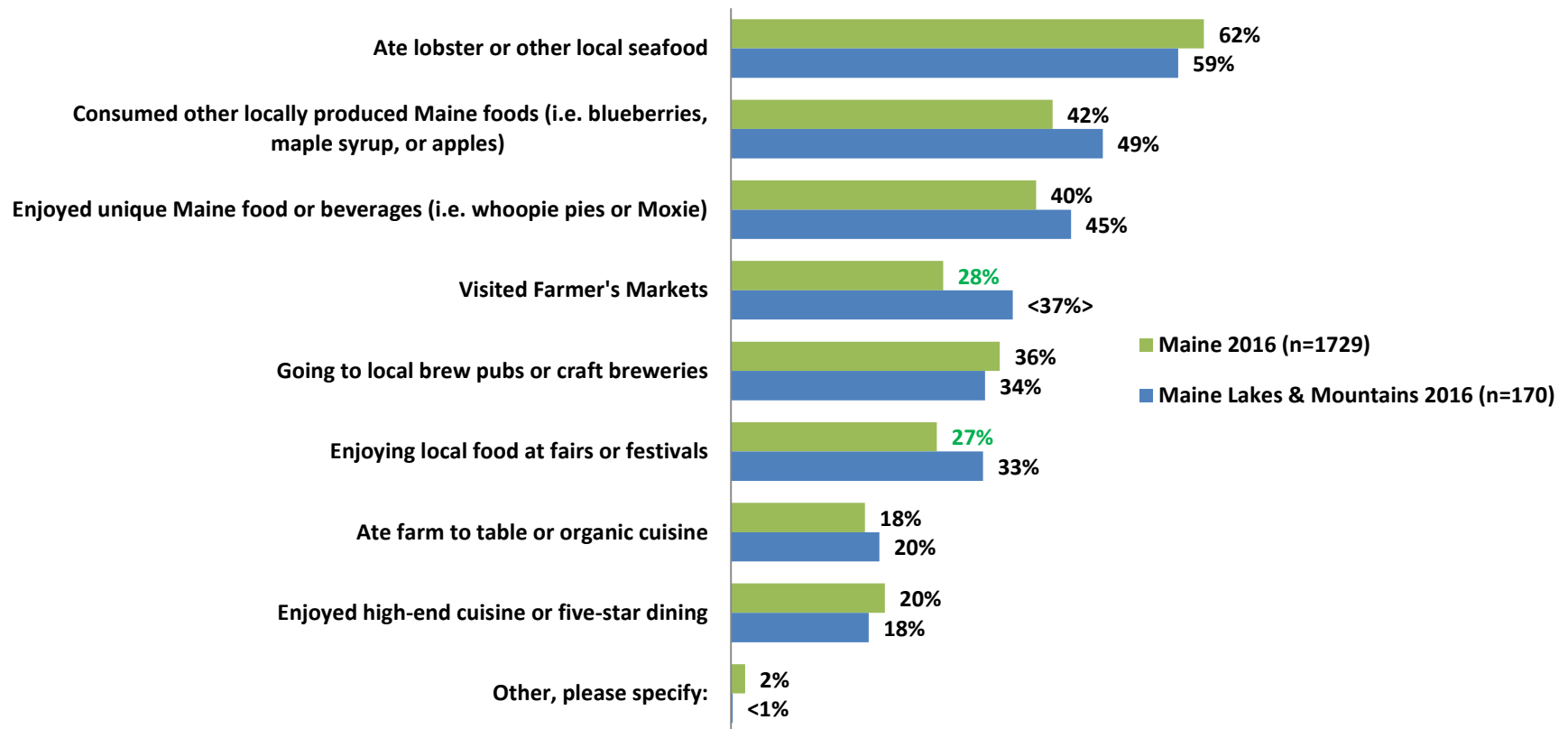<> indicates a significant difference between subgroups at the 95% confidence level.
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Hiking/climbing/backpacking is the most common activity among overnight visitors who are interested in active outdoor activities.

- Overnight visitors to the Lakes & Mountains region who are interested in active outdoor activities are <u>more</u> likely to *ride all-terrain vehicles* compared to visitors to the State of Maine as a whole.

Active Outdoor Activities – Non-Water
Base: Those who report outdoor activities as an interest area for their Maine trip

Activity	Maine 2016 (n=985)	Maine Lakes & Mountains 2016 (n=145)
Hiking, climbing, or backpacking	56%	59%
Exploring State and National Parks	40%	31%
Camping	23%	26%
Riding all-terrain vehicles	11%	<19%>
Bicycling or mountain biking	21%	15%
Alpine skiing or snowboarding	5%	8%
Snowmobiling	4%	7%
Hunting (game or bird)	7%	7%
Snowshoeing	4%	5%
Nordic skiing	3%	4%
Other	<7%>	1%

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
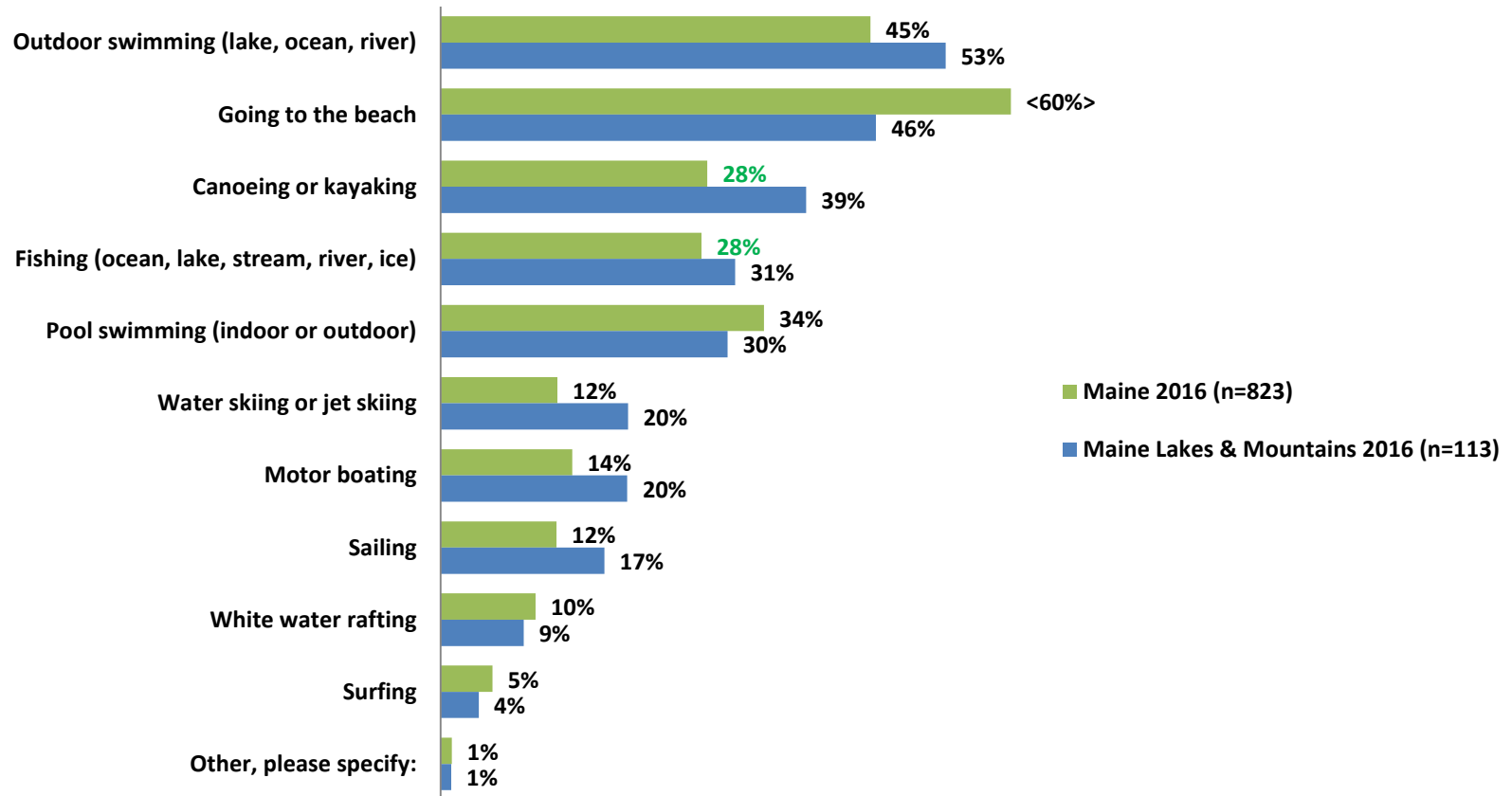<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of overnight visitors interested in history or culture *visit historic sites/museums* while in the Lakes & Mountains region.

- Though it is the most popular history/culture activity among overnight visitors to the Lakes & Mountains region, <u>fewer</u> Lakes & Mountains visitors *visit historic sites or museums* as compared to visitors to the State overall.

History or Culture Activities

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

Activity	Maine 2016 (n=868)	Maine Lakes & Mountains 2016 (n=122)
Visiting historic sites or museums	<63%>	52%
Getting to know the local people and/or culture	33%	39%
Visiting art museums or local artisan exhibits	37%	38%
Participating in nightlife or other evening entertainment	22%	24%
Painting, drawing, or sketching	12%	16%
Attending plays, musicals, or theatrical events	15%	15%
Attending sports events	10%	14%
Attending popular music concerts or events	12%	12%
Attending operas or classical music events	6%	9%

■ Maine 2016 (n=868)

■ Maine Lakes & Mountains 2016 (n=122)

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
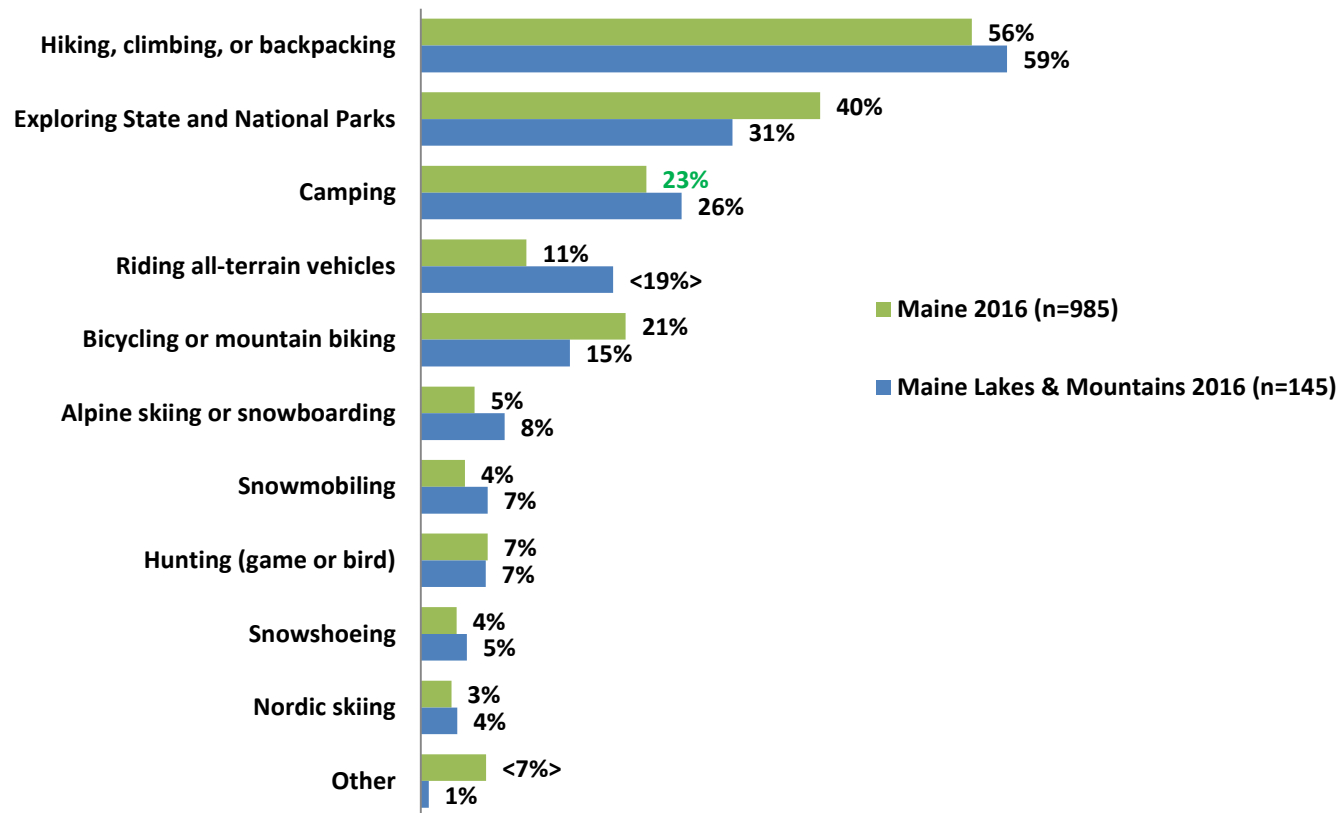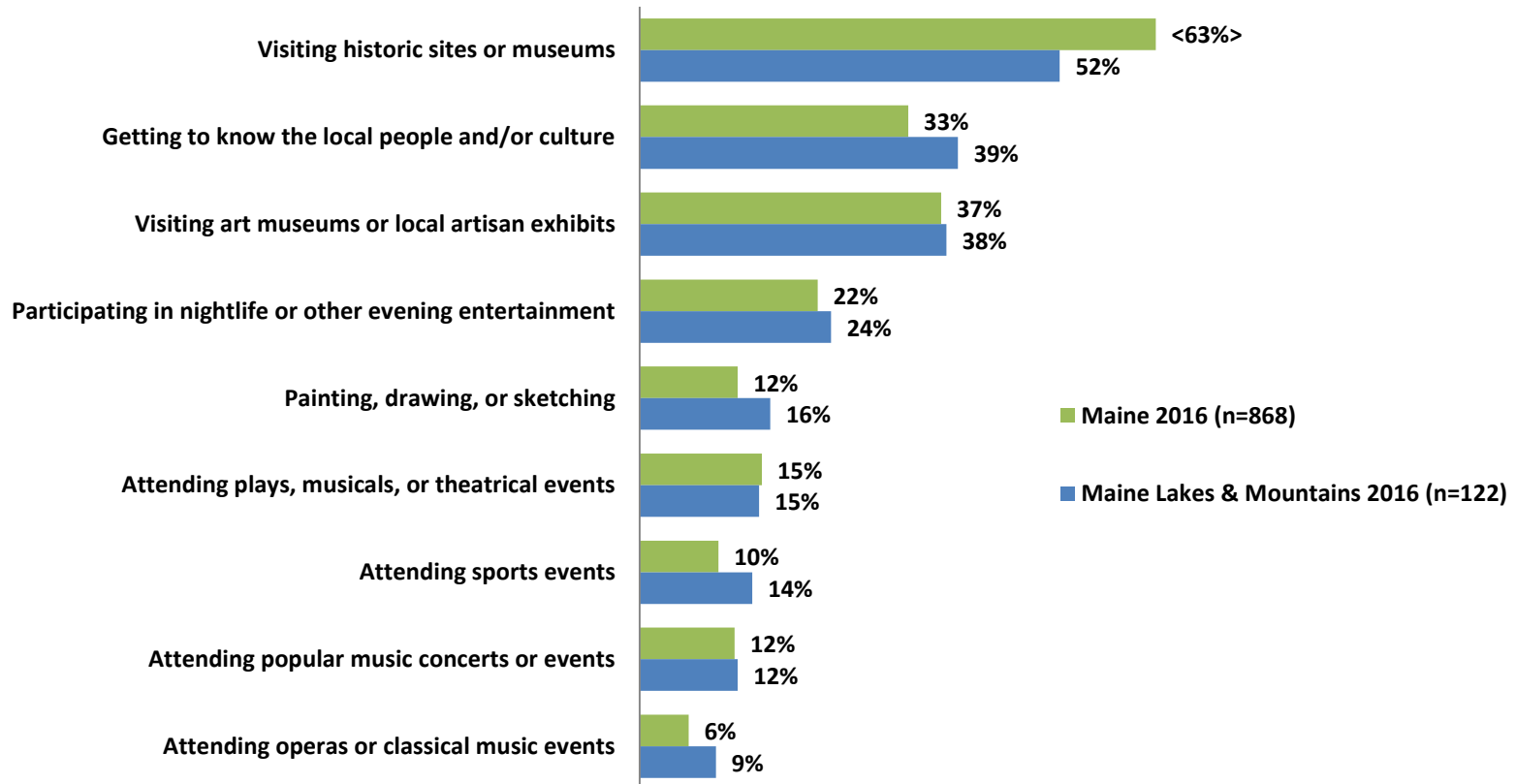<> indicates a significant difference between subgroups at the 95% confidence level.
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Overnight visitors to the Lakes & Mountains region who are interested in shopping shop in a variety of places.

- Compared to 2015, <u>higher</u> proportions of Lakes & Mountains visitors did some *outlet shopping* or *shopped for gifts or souvenirs* in 2016.

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

Activity	Maine 2016 (n=1485)	Maine Lakes & Mountains 2016 (n=152)
Outlet shopping	54%	54%
Shopping for gifts or souvenirs	40%	48%
General shopping at malls, downtown	47%	44%
Shopping for unique, locally produced goods	32%	29%
Shopping for antiques, local arts and crafts	26%	26%
Shopping for products with the 'Made in Maine' identifier	24%	23%

■ Maine 2016 (n=1485)

■ Maine Lakes & Mountains 2016 (n=152)

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.

Nearly one half of overnight visitors interested in family fun/ children's activities visit an *outdoor fun center* while in this region.

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

Activity	Maine 2016 (n=836)	Maine Lakes & Mountains 2016 (n=115)
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	39%	47%
Animal parks or zoos	26%	24%
Water parks	26%	23%
Amusement or theme parks	27%	22%
Children's museums	25%	21%
Horseback riding	14%	17%
Summer camps	7%	6%
Agricultural fairs	12%	6%
Spectator sports	6%	2%
Other	9%	8%

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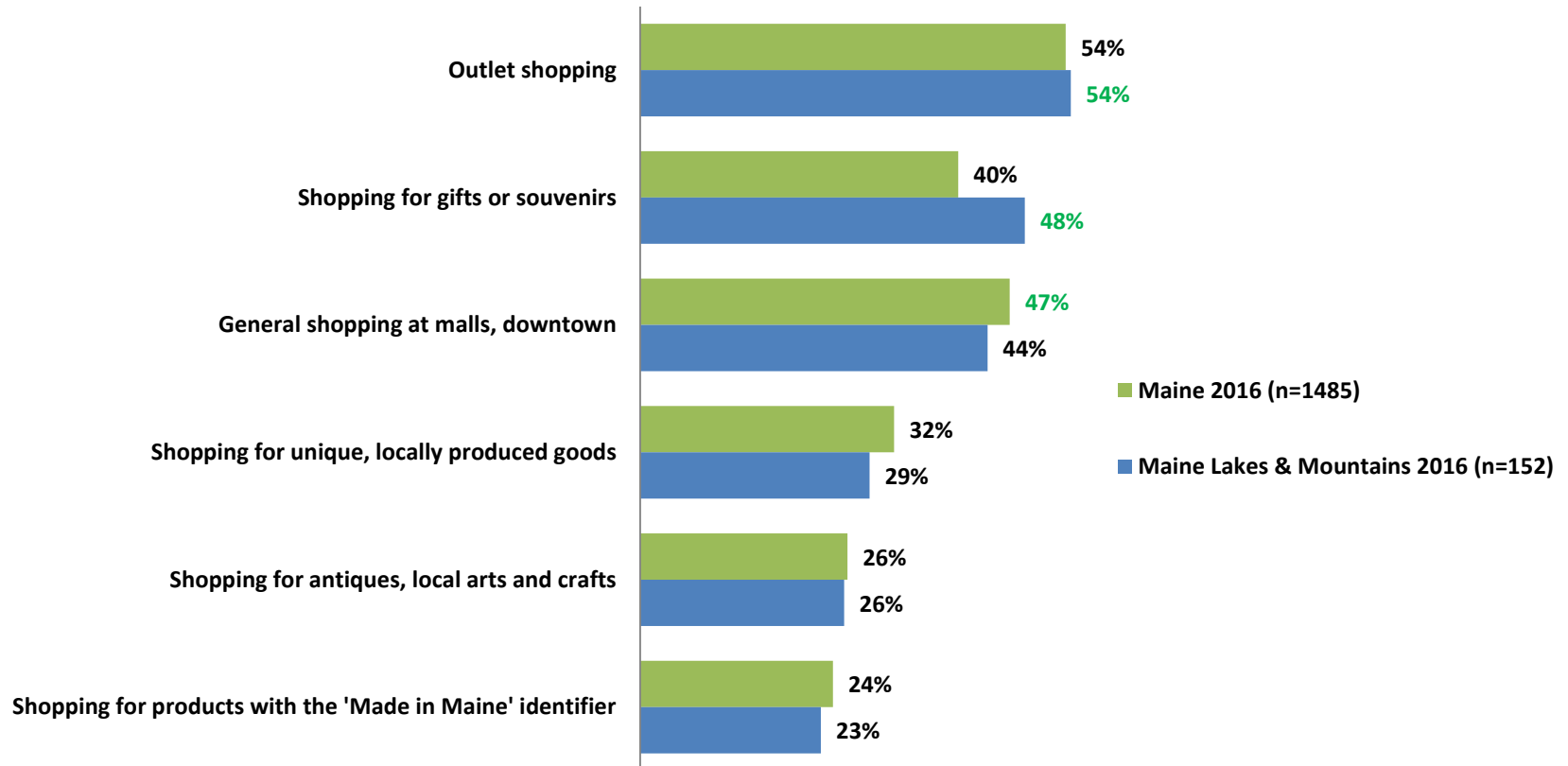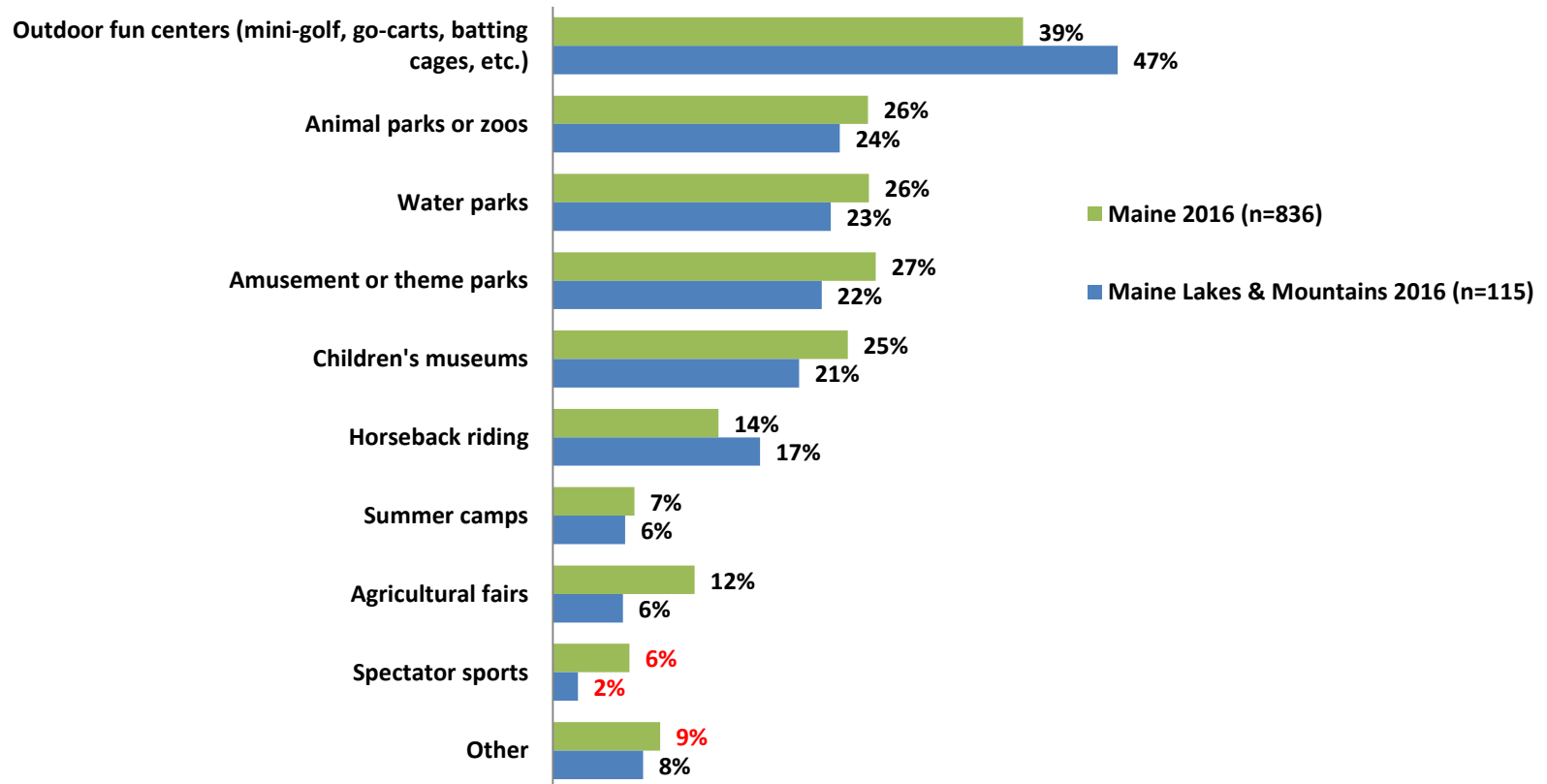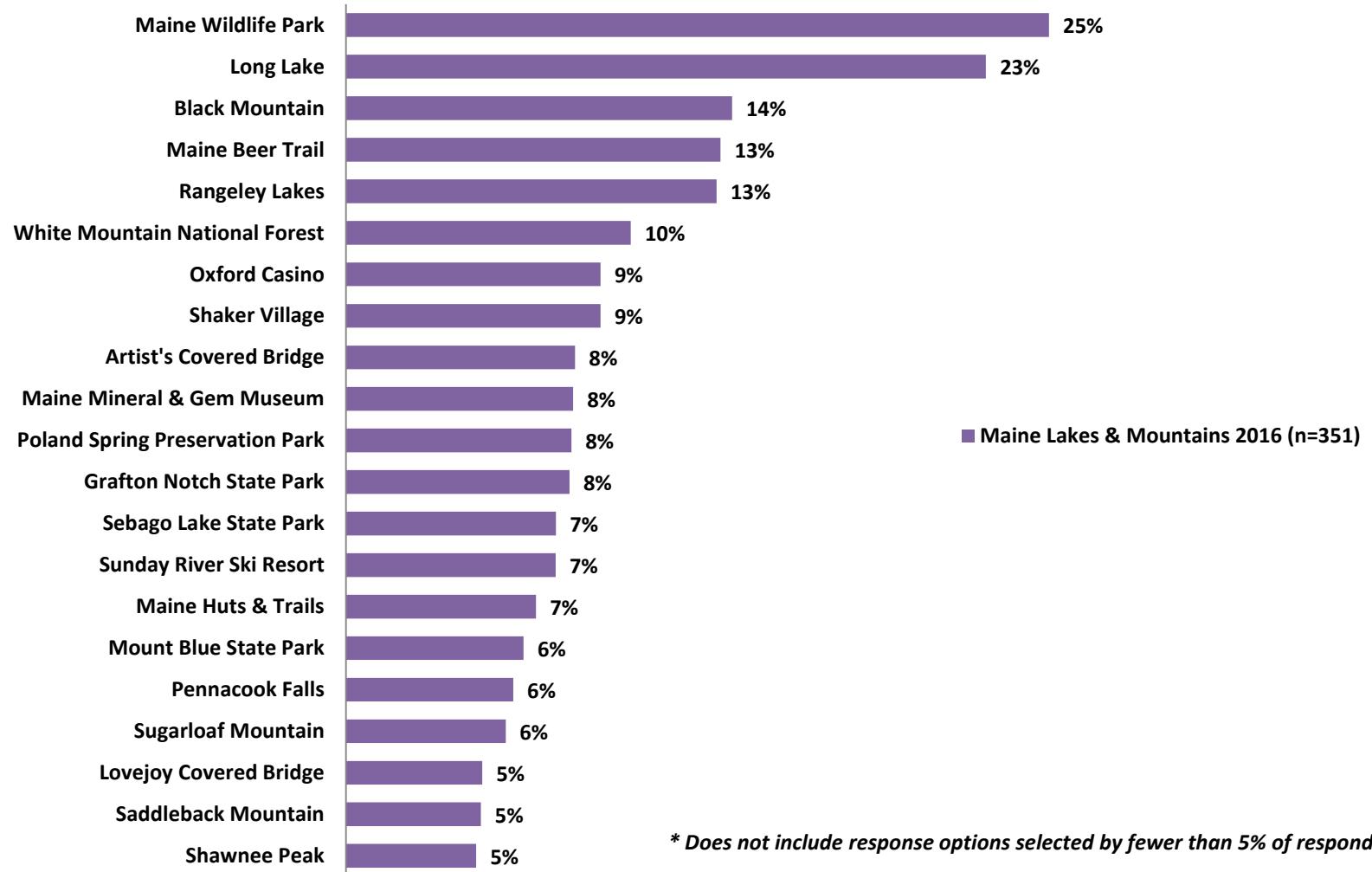Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight visitors to the Lakes & Mountains region are most likely to visit the *Maine Wildlife Park* and *Long Lake .*

Top Attractions/Locations Visited*

Location	Percentage
Maine Wildlife Park	25%
Long Lake	23%
Black Mountain	14%
Maine Beer Trail	13%
Rangeley Lakes	13%
White Mountain National Forest	10%
Oxford Casino	9%
Shaker Village	9%
Artist's Covered Bridge	8%
Maine Mineral & Gem Museum	8%
Poland Spring Preservation Park	8%
Grafton Notch State Park	8%
Sebago Lake State Park	7%
Sunday River Ski Resort	7%
Maine Huts & Trails	7%
Mount Blue State Park	6%
Pennacook Falls	6%
Sugarloaf Mountain	6%
Lovejoy Covered Bridge	5%
Saddleback Mountain	5%
Shawnee Peak	5%

■ Maine Lakes & Mountains 2016 (n=351)

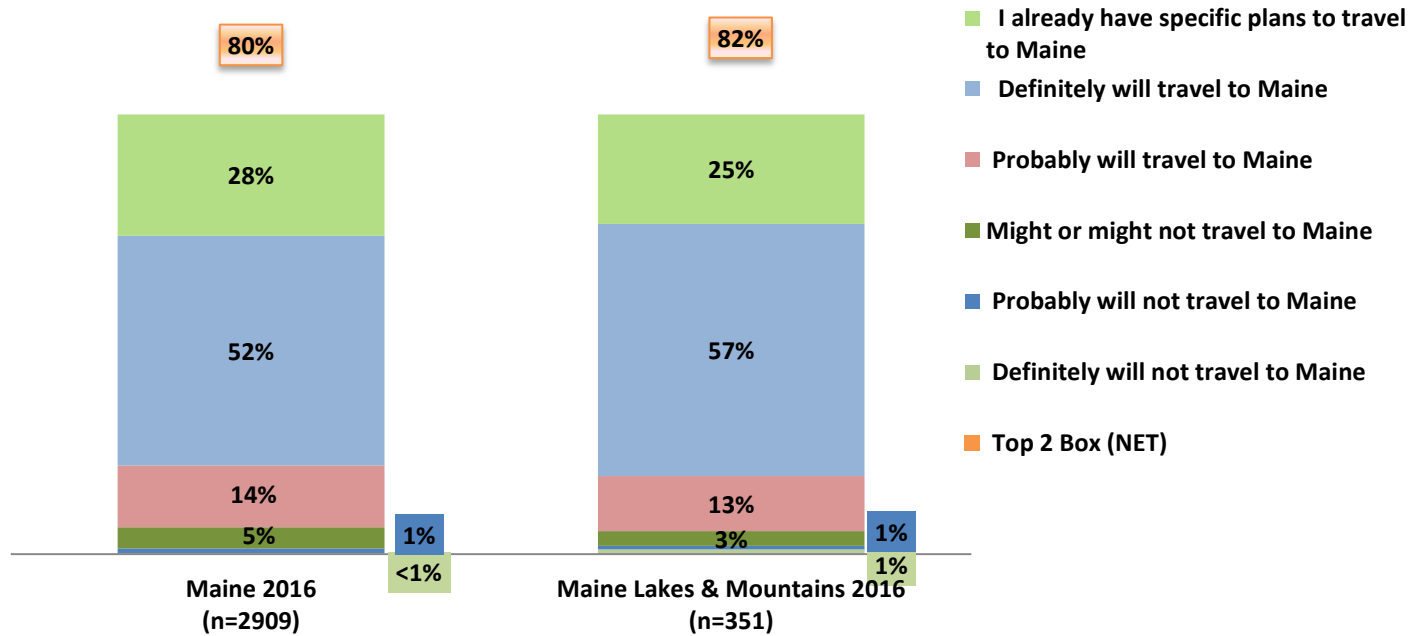** Does not include response options selected by fewer than 5% of respondents.*

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.

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Four in five overnight visitors plan to visit Maine again in the future.

Future Travel Likelihood

Legend:
- ■ I already have specific plans to travel to Maine
- ■ Definitely will travel to Maine
- ■ Probably will travel to Maine
- ■ Might or might not travel to Maine
- ■ Probably will not travel to Maine
- ■ Definitely will not travel to Maine
- ■ Top 2 Box (NET)

Maine 2016 (n=2909):
- 80%
- 28%
- 52%
- 14%
- 5%
- 1%
- <1%

Maine Lakes & Mountains 2016 (n=351):
- 82%
- 25%
- 57%
- 13%
- 3%
- 1%
- 1%

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 Maine Lakes & Mountains region average 45 years of age and earn about $87,000 annually. Three in five have a college degree, and half are employed full-time. Fifty-two percent are married.

Day Visitors	Maine 2016 (n=1762)	Maine Lakes & Mountains 2016 (n=160)
Age:		
< 35	28%	29%
35 - 44	18%	20%
45 - 54	19%	21%
55 +	35%	30%
Mean Age (Years)	46.0	45.2
Income:		
< $50,000	26%	27%
$50,000 - $99,999	42%	42%
$100,000 +	32%	31%
Mean Income	$88,100	$86,800
Female	75%	72%
College Degree or Higher	63%	59%
Married	56%	52%
Employed Full-Time	52%	54%

<> indicates a significant difference between subgroups at the 95% confidence level.
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Day visitors to the Lakes & Mountains region come from similar areas as day visitors to the State of Maine as a whole.

- The proportion of in-state day visitors visiting the Lakes & Mountains has dropped from 2015 (51%) to 2016 (30%).

State/ Province of Residence

State/Province	Maine 2016 (n=1762)	Maine Lakes & Mountains 2016 (n=160)
U.S. NET	88%	88%
Massachusetts	43%	36%
Maine	26%	30%
New Hampshire	16%	19%
Rhode Island	1%	2%
Vermont	2%	<1%
Canada NET	12%	12%
Quebec	7%	8%
New Brunswick	5%	3%
Nova Scotia	1%	<1%

■ Maine 2016 (n=1762)
■ Maine Lakes & Mountains 2016 (n=160)
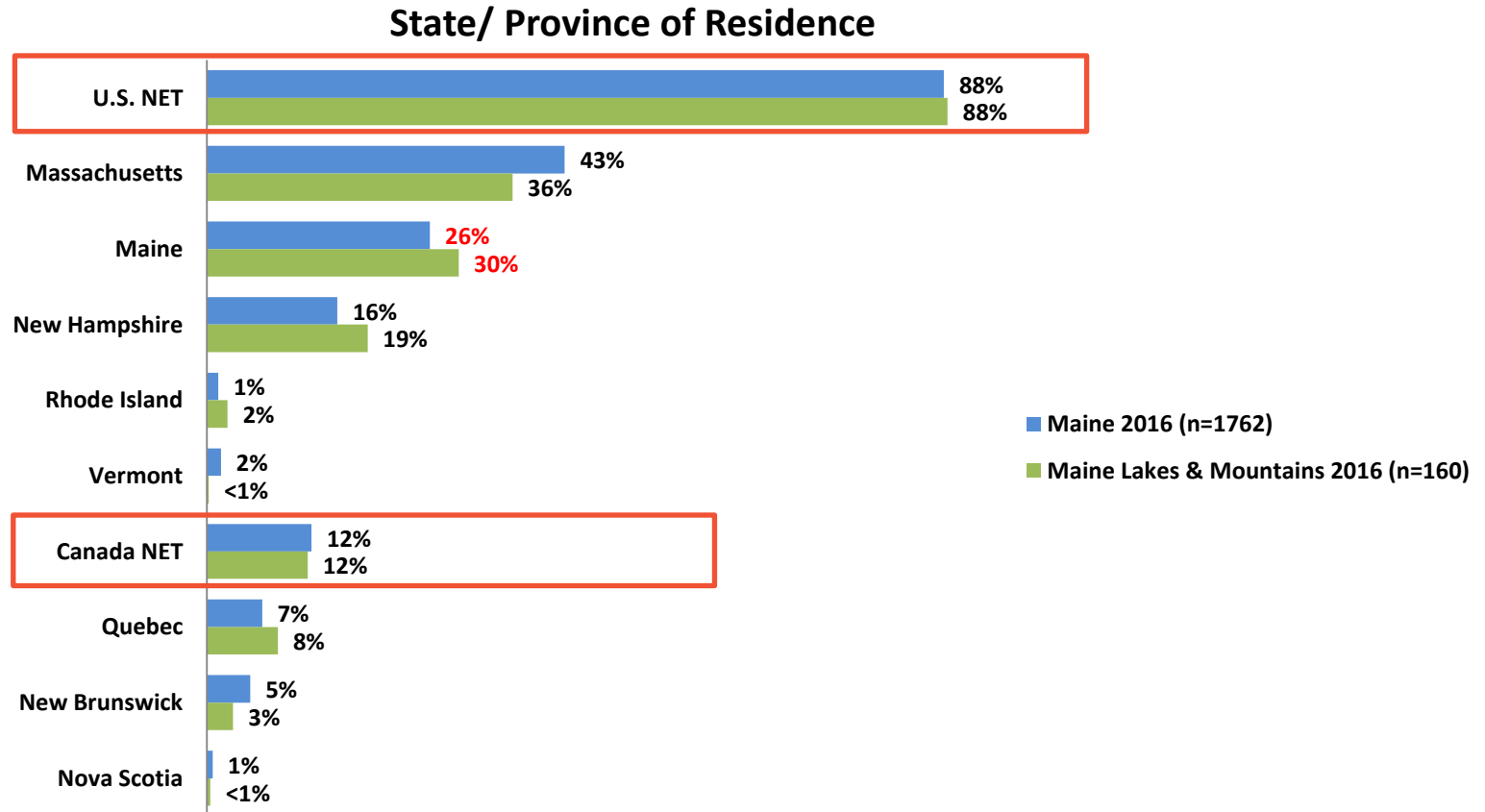
Q2. In what State or Province do you reside?
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Nine in ten day visitors to the Lakes & Mountains region are repeat visitors to Maine.

- 2016 saw an increase in the proportion of first-time day visitors to the Lakes & Mountains region, as compared to 2015.

Repeat vs. First-Time Visitors

Maine 2016
(n=1762)

93%

7%

Maine Lakes & Mountains 2016
(n=160)

89%

11%

■ Repeat Visitor
■ First-Time Visitor

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.

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One in three visitors to the Lakes & Mountains region are traveling with children, with an average travel party size of about three overall.

Travel Party Composition

2.7	**2.8**

31%   31%

■ **Percent Traveling with Children**

■ **Average Number of People in Travel Party**

Maine 2016
(n=1762)

Maine Lakes & Mountains 2016
(n=160)

Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?
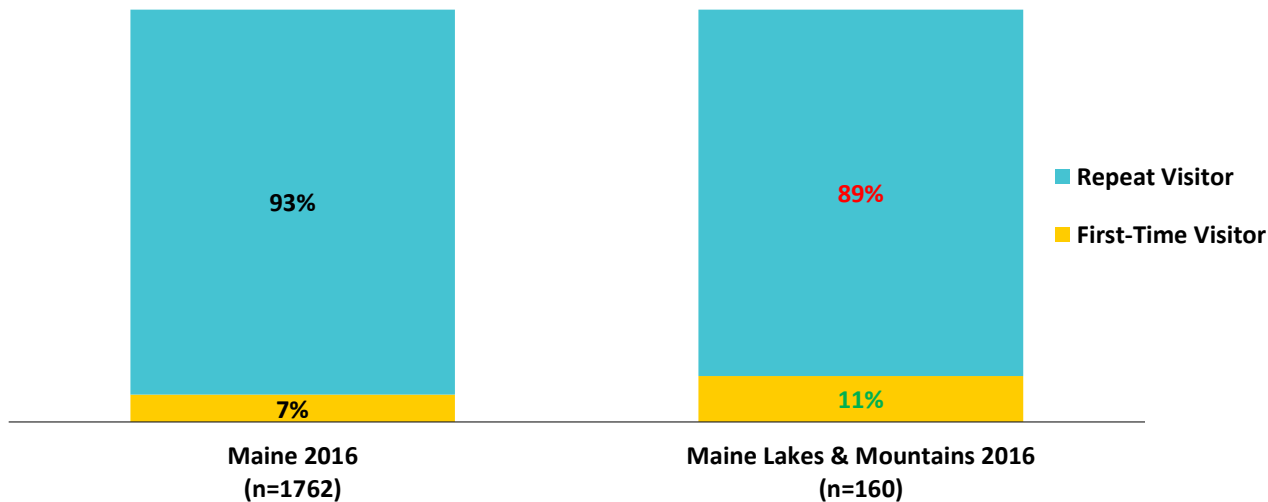Q16. How many of these people were: Children
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors:
Trip Experience

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:

- Primary purpose of business trips (n=22)

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

Primary Purpose of Day VFR Trips

- General visit to see friends or relatives: 69% (Maine 2016 VFR), 79% (Maine Lakes & Mountains 2016 VFR)
- Wedding: 5% (Maine 2016 VFR), 6% (Maine Lakes & Mountains 2016 VFR)
- Holiday visit: 8% (Maine 2016 VFR), 4% (Maine Lakes & Mountains 2016 VFR)
- Funeral: 3% (Maine 2016 VFR), 3% (Maine Lakes & Mountains 2016 VFR)
- Family reunion: 8% (Maine 2016 VFR), 3% (Maine Lakes & Mountains 2016 VFR)
- Other: 6% (Maine 2016 VFR), 5% (Maine Lakes & Mountains 2016 VFR)

■ Maine 2016 VFR (n=720)
■ Maine Lakes & Mountains 2016 VFR (n=73)

Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
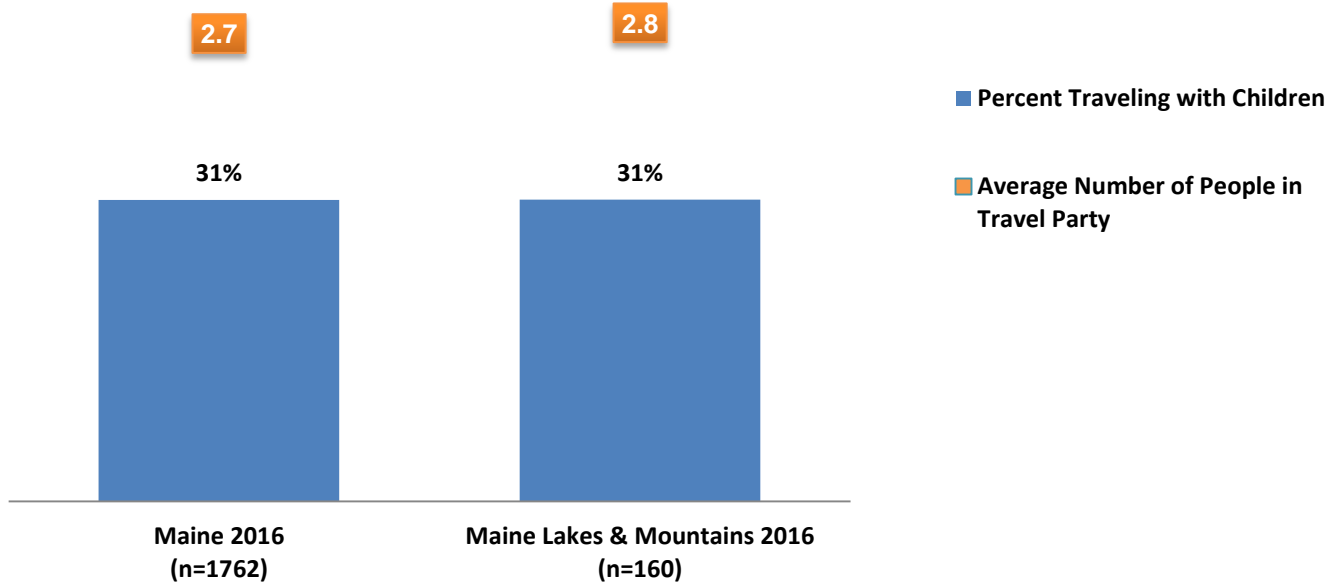<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
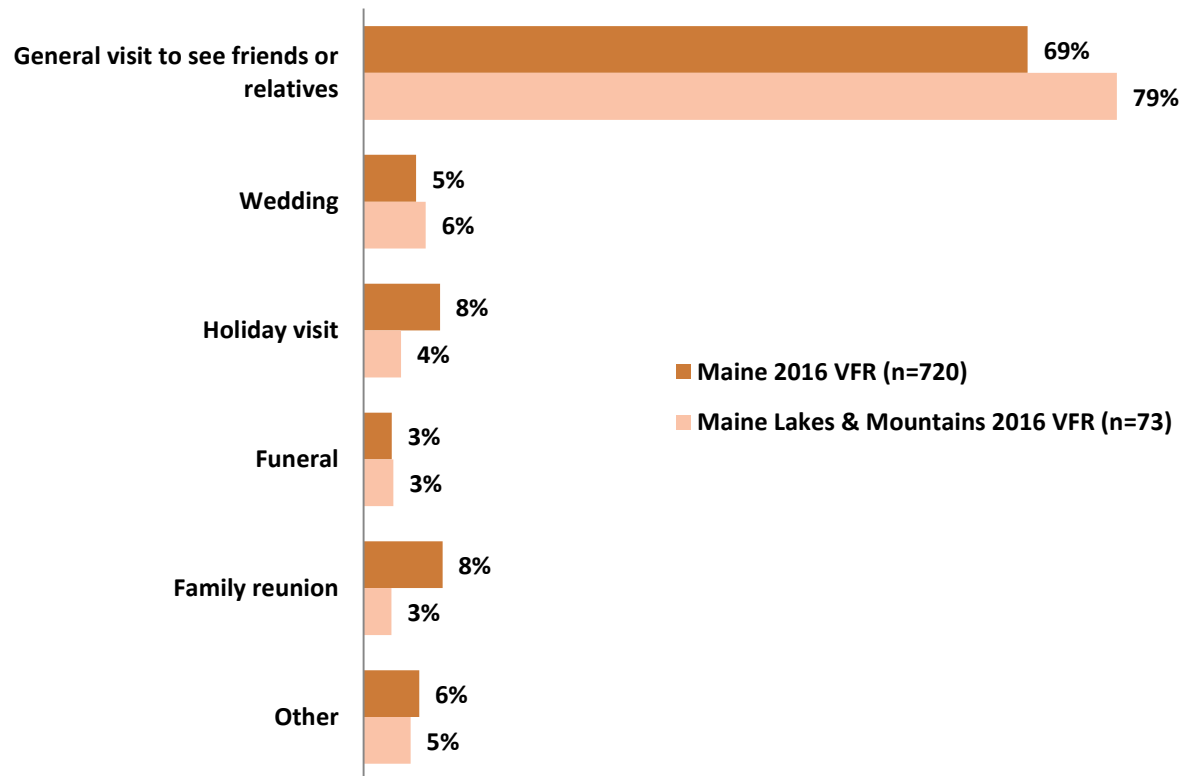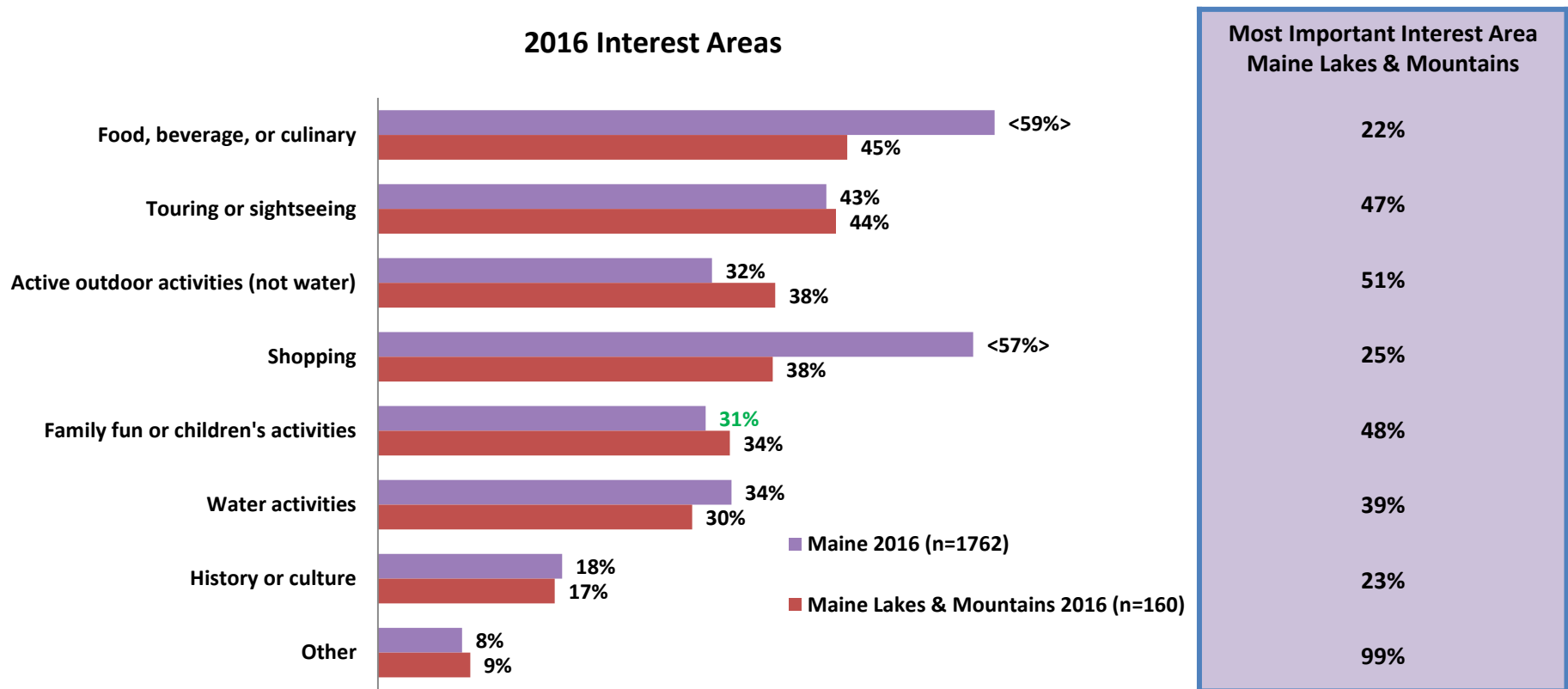
Day visitors to the region are most likely to want to pursue *food/ beverage/culinary* and *touring/sightseeing* interests.

- Interest areas of day visitors to the Lakes & Mountains differ somewhat from interest areas of day visitors to the State of Maine overall. Lakes & Mountains visitors are <u>less</u> likely to be interested in *food/beverage/culinary* and *shopping activities*.

2016 Interest Areas

Interest Area	Maine 2016	Maine Lakes & Mountains 2016	Most Important Interest Area Maine Lakes & Mountains
Food, beverage, or culinary	<59%>	45%	22%
Touring or sightseeing	43%	44%	47%
Active outdoor activities (not water)	32%	38%	51%
Shopping	<57%>	38%	25%
Family fun or children's activities	31%	34%	48%
Water activities	34%	30%	39%
History or culture	18%	17%	23%
Other	8%	9%	99%

- Maine 2016 (n=1762)
- Maine Lakes & Mountains 2016 (n=160)

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
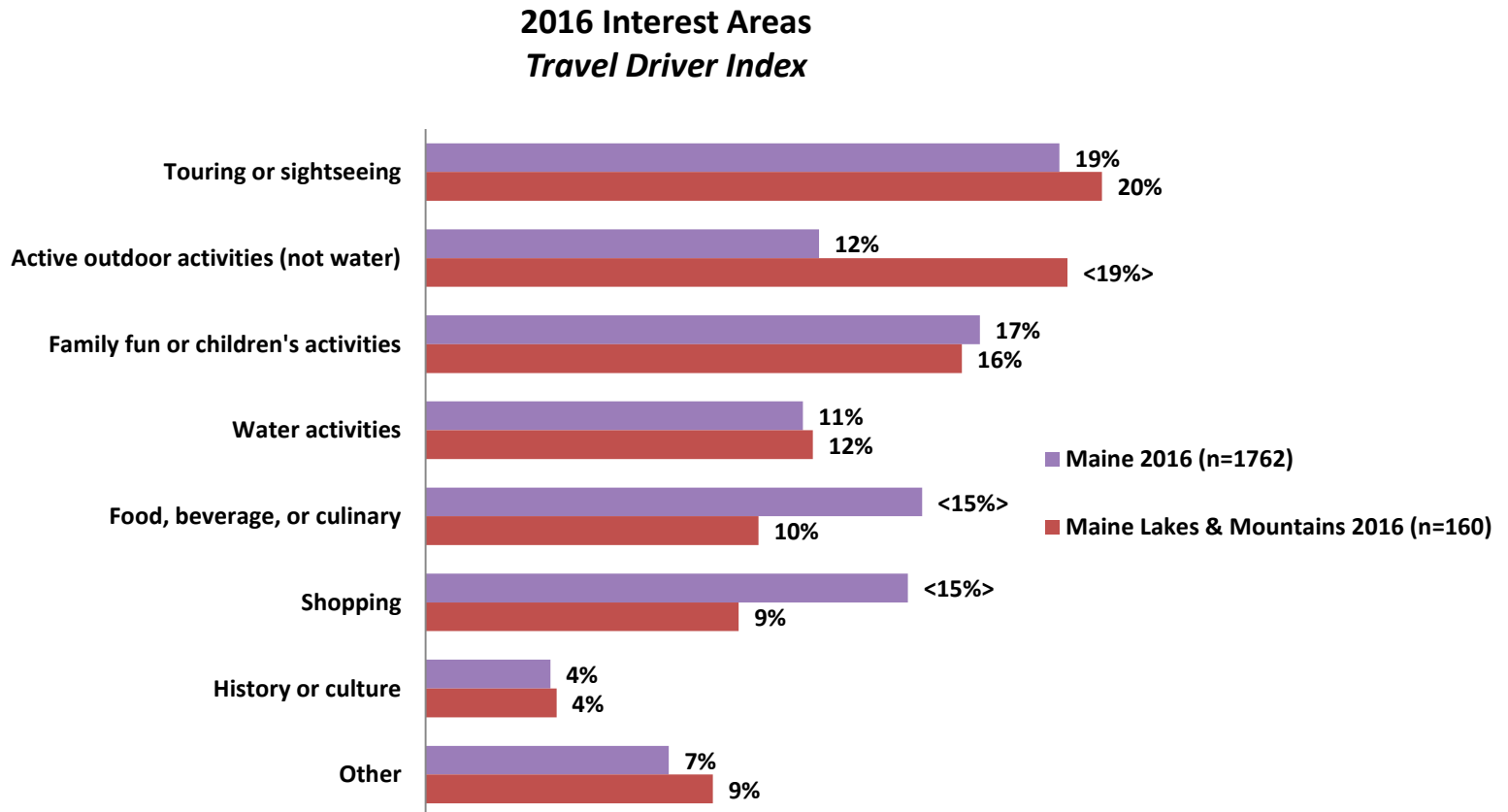Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the <u>most important</u>.
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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When considering both interest and importance in deciding to visit, *touring/sightseeing* and *active outdoor activities* rank highest among day visitors to the Lakes & Mountains.

- Day visitors to the Lakes & Mountains region place <u>more</u> importance on *active outdoor activities* and <u>less</u> importance on *food/beverage/culinary activities* and *shopping* than do day visitors to the State of Maine overall.

2016 Interest Areas
Travel Driver Index

Chart — "2016 Interest Areas Travel Driver Index" comparing Maine 2016 (n=1762) and Maine Lakes & Mountains 2016 (n=160):

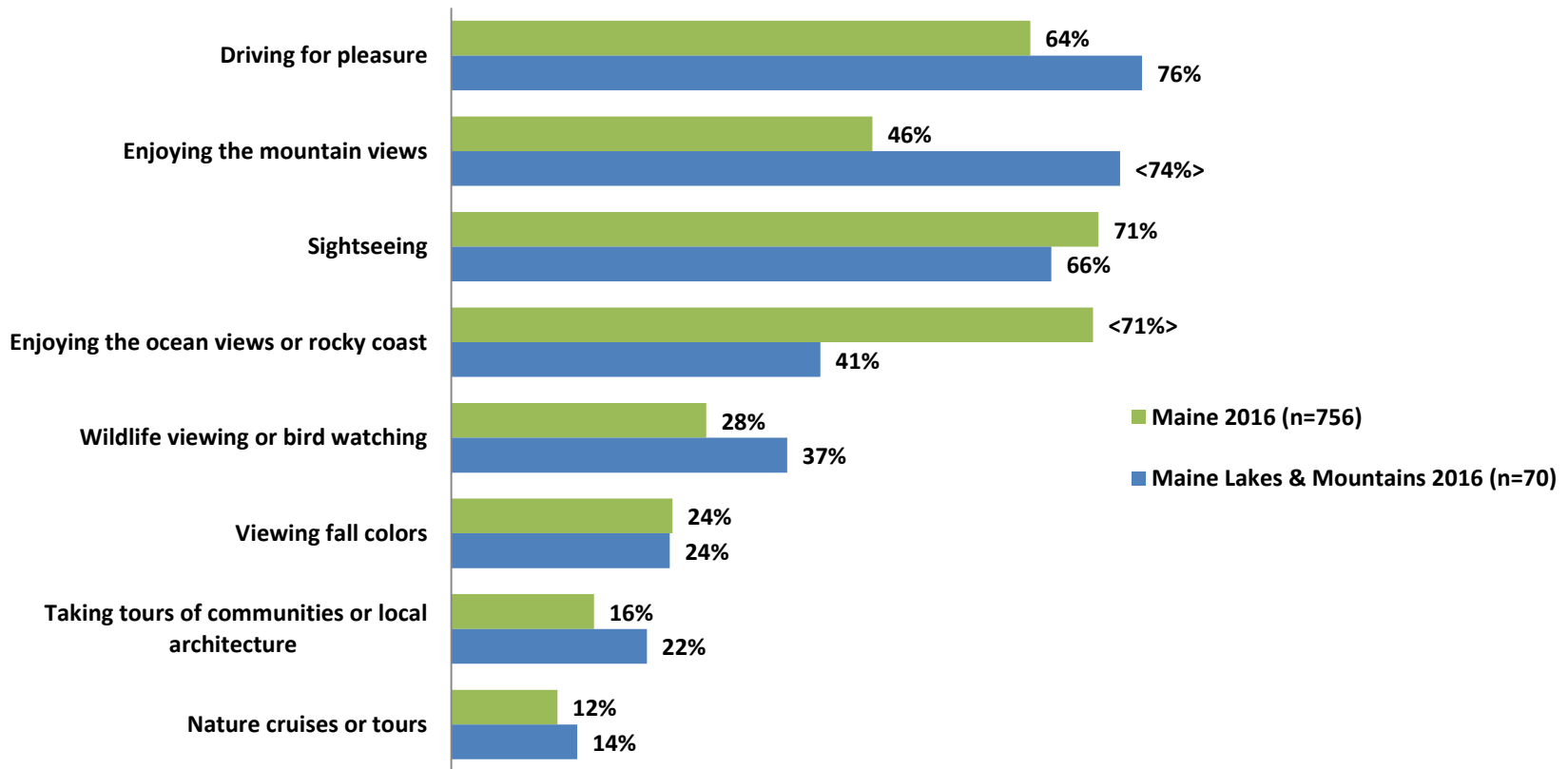| Interest Area	Maine 2016 (n=1762)	Maine Lakes & Mountains 2016 (n=160)
Touring or sightseeing	19%	20%
Active outdoor activities (not water)	12%	<19%>
Family fun or children's activities	17%	16%
Water activities	11%	12%
Food, beverage, or culinary	<15%>	10%
Shopping	<15%>	9%
History or culture	4%	4%
Other	7%	9%

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

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Driving for pleasure and *enjoying the mountain views* are the most common touring/sightseeing activities among day visitors to this region.

- Day visitors to the Lakes & Mountains region are <u>more</u> likely than Maine visitors overall to *enjoy mountain views*, but <u>less</u> likely to *enjoy ocean views*.

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

Activity	Maine 2016 (n=756)	Maine Lakes & Mountains 2016 (n=70)
Driving for pleasure	64%	76%
Enjoying the mountain views	46%	<74%>
Sightseeing	71%	66%
Enjoying the ocean views or rocky coast	<71%>	41%
Wildlife viewing or bird watching	28%	37%
Viewing fall colors	24%	24%
Taking tours of communities or local architecture	16%	22%
Nature cruises or tours	12%	14%

■ Maine 2016 (n=756)
■ Maine Lakes & Mountains 2016 (n=70)

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.

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Nearly half of all day visitors interested in food/beverage/culinary activities *consume locally produced Maine foods* or *eat lobster/seafood* while visiting the region.

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

Consumed other locally produced Maine foods (i.e. blueberries, maple syrup, or apples)
- **50%** (Maine 2016)
- **47%** (Maine Lakes & Mountains 2016)

Ate lobster or other local seafood
- **62%**
- **47%**

Enjoying local food at fairs or festivals
- **26%**
- **32%**

Enjoyed unique Maine food or beverages (i.e. whoopie pies or Moxie)
- **38%**
- **29%**

Going to local brew pubs or craft breweries
- **30%**
- **28%**

Visited Farmer's Markets
- **23%**
- **28%**

Enjoyed high-end cuisine or five-star dining
- **11%**
- **19%**

Ate farm to table or organic cuisine
- **14%**
- **18%**

Other
- **5%**
- **6%**

■ Maine 2016 (n=1039)

■ Maine Lakes & Mountains 2016 (n=72)

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Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
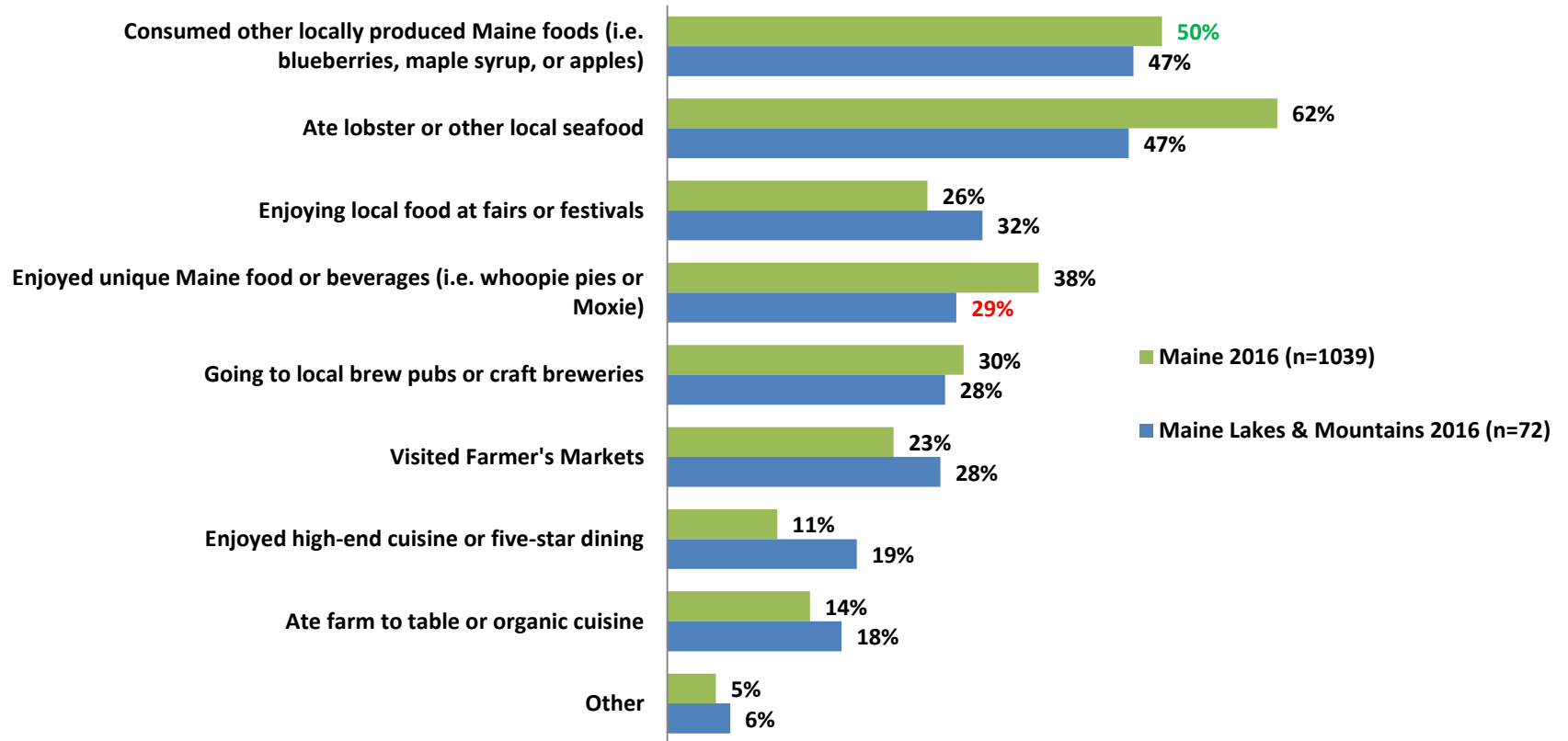<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Nearly two-thirds of day visitors to this region who are interested in water activities report *going to the beach* or *outdoor swimming* while visiting.

- *Canoeing/kayaking, motor boating* and *water skiing/jet skiing* are all more popular among Lakes & Mountains day visitors than among day visitors to Maine as a whole.

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

Activity	Maine 2016 (n=596)	Maine Lakes & Mountains 2016 (n=48*)
Going to the beach	76%	64%
Outdoor swimming (lake, ocean, river)	53%	63%
Canoeing or kayaking	27%	<52%>
Motor boating	12%	<37%>
Fishing (ocean, lake, stream, river, ice)	22%	36%
Pool swimming (indoor or outdoor)	30%	27%
Water skiing or jet skiing	8%	<24%>
White water rafting	9%	18%
Surfing	3%	10%
Sailing	6%	2%
Other	4%	1%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
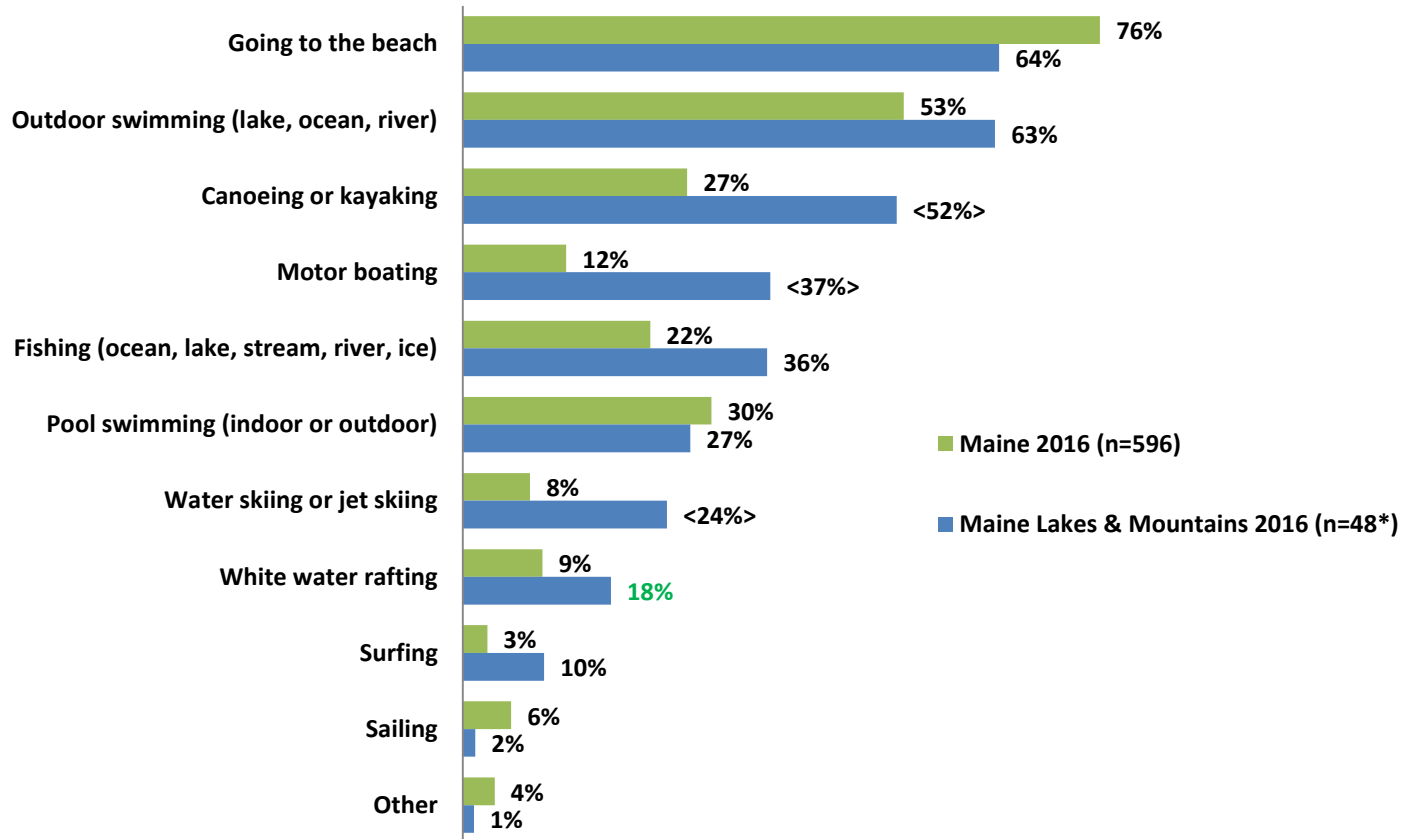<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
*Please note small sample size. Use caution when interpreting results.

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Hiking/climbing/backpacking is the most common non-water active outdoor activity among day visitors to this region.

Active Outdoor Activities – Non-Water
Base: Those who report outdoor activities as an interest area for their Maine trip

Activity	Maine 2016 (n=563)	Maine Lakes & Mountains 2016 (n=61)
Hiking, climbing, or backpacking	69%	75%
Exploring State and National Parks	43%	31%
Riding all-terrain vehicles	12%	21%
Bicycling or mountain biking	18%	21%
Snowshoeing	4%	7%
Alpine skiing or snowboarding	4%	6%
Nordic skiing	2%	5%
Hunting (game or bird)	6%	4%
Snowmobiling	5%	3%
Other	9%	14%

Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
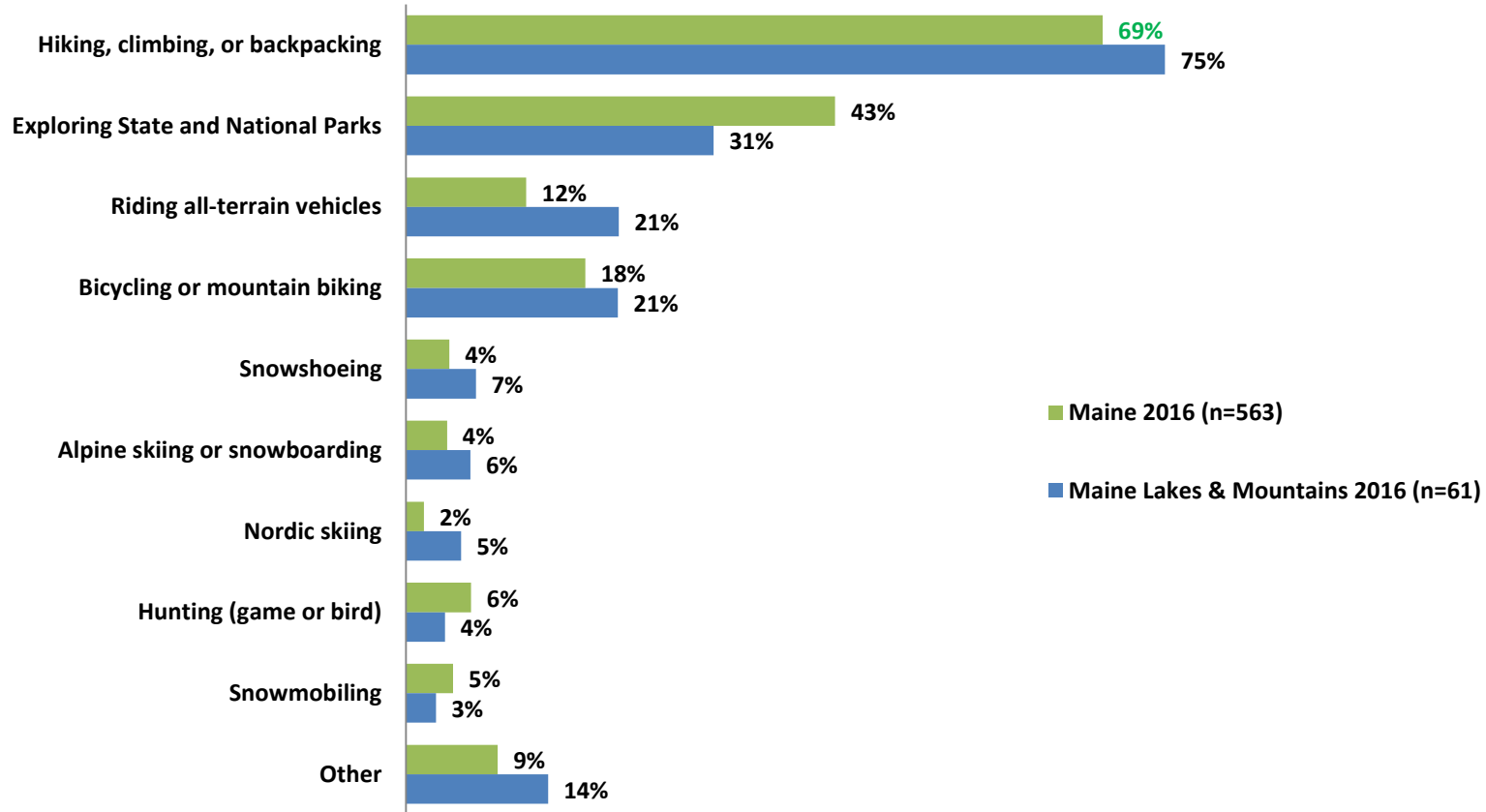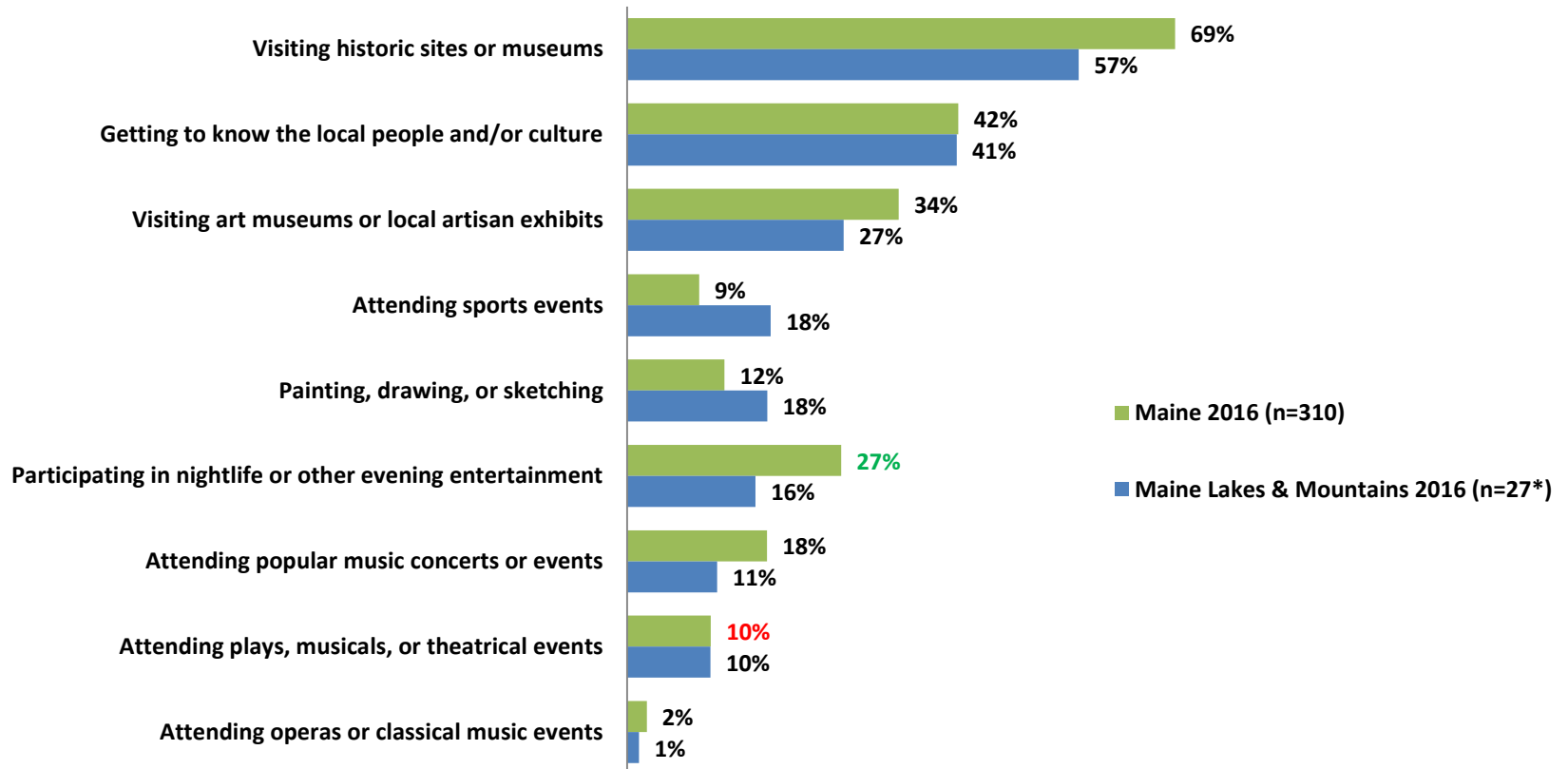<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Among day visitors to the region who are interested in history/culture, three in five *visited historic sites or museums* during their trip.

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

Activity	Maine 2016 (n=310)	Maine Lakes & Mountains 2016 (n=27*)
Visiting historic sites or museums	69%	57%
Getting to know the local people and/or culture	42%	41%
Visiting art museums or local artisan exhibits	34%	27%
Attending sports events	9%	18%
Painting, drawing, or sketching	12%	18%
Participating in nightlife or other evening entertainment	27%	16%
Attending popular music concerts or events	18%	11%
Attending plays, musicals, or theatrical events	10%	10%
Attending operas or classical music events	2%	1%

■ Maine 2016 (n=310)

■ Maine Lakes & Mountains 2016 (n=27*)

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.
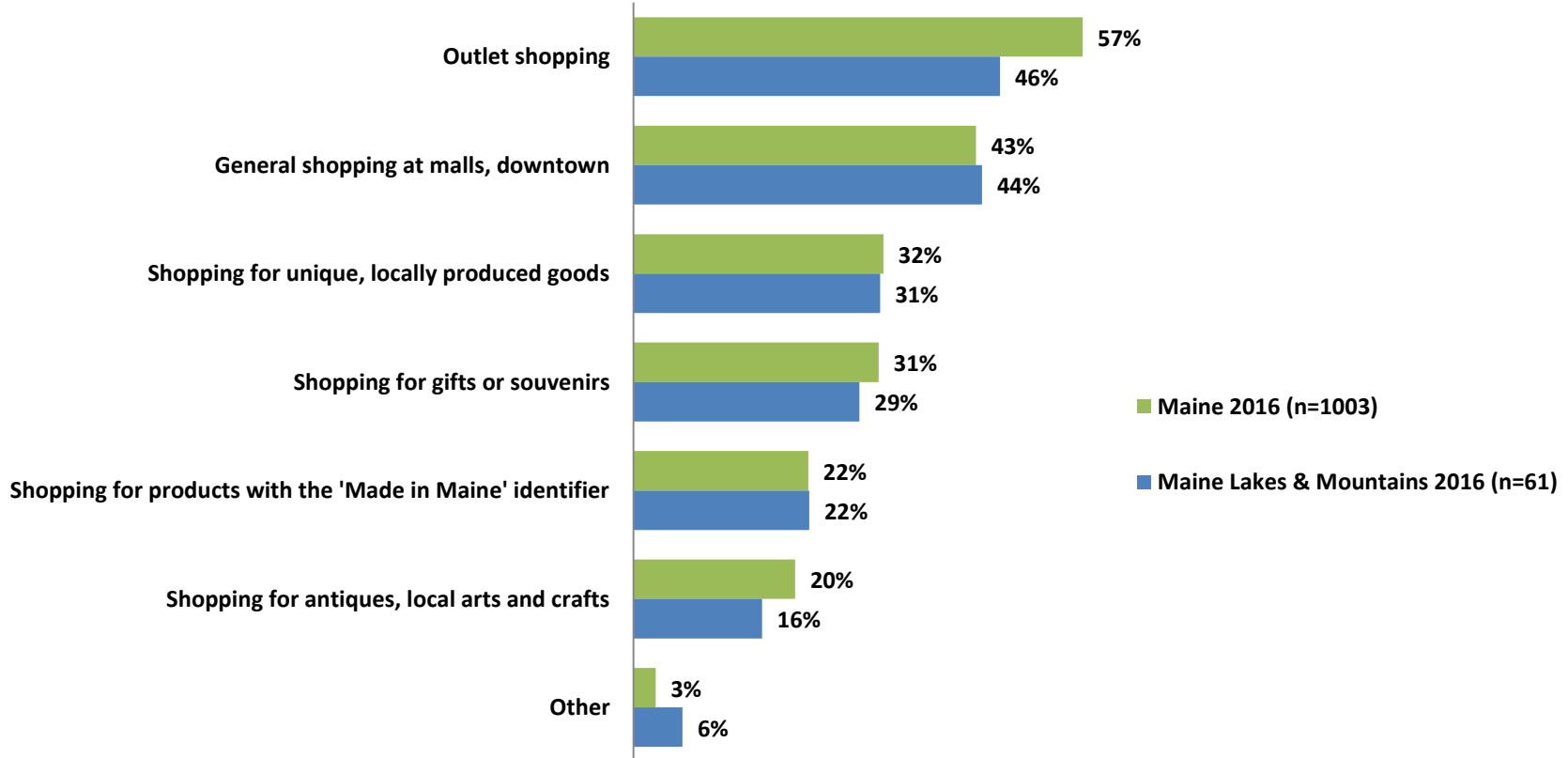Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
*Please note small sample size. Use caution when interpreting results.

Just under half of day visitors interested in shopping do some *outlet shopping* or *shopping at malls/downtown* while visiting the region.

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

Activity	Maine 2016 (n=1003)	Maine Lakes & Mountains 2016 (n=61)
Outlet shopping	57%	46%
General shopping at malls, downtown	43%	44%
Shopping for unique, locally produced goods	32%	31%
Shopping for gifts or souvenirs	31%	29%
Shopping for products with the 'Made in Maine' identifier	22%	22%
Shopping for antiques, local arts and crafts	20%	16%
Other	3%	6%

■ Maine 2016 (n=1003)

■ Maine Lakes & Mountains 2016 (n=61)

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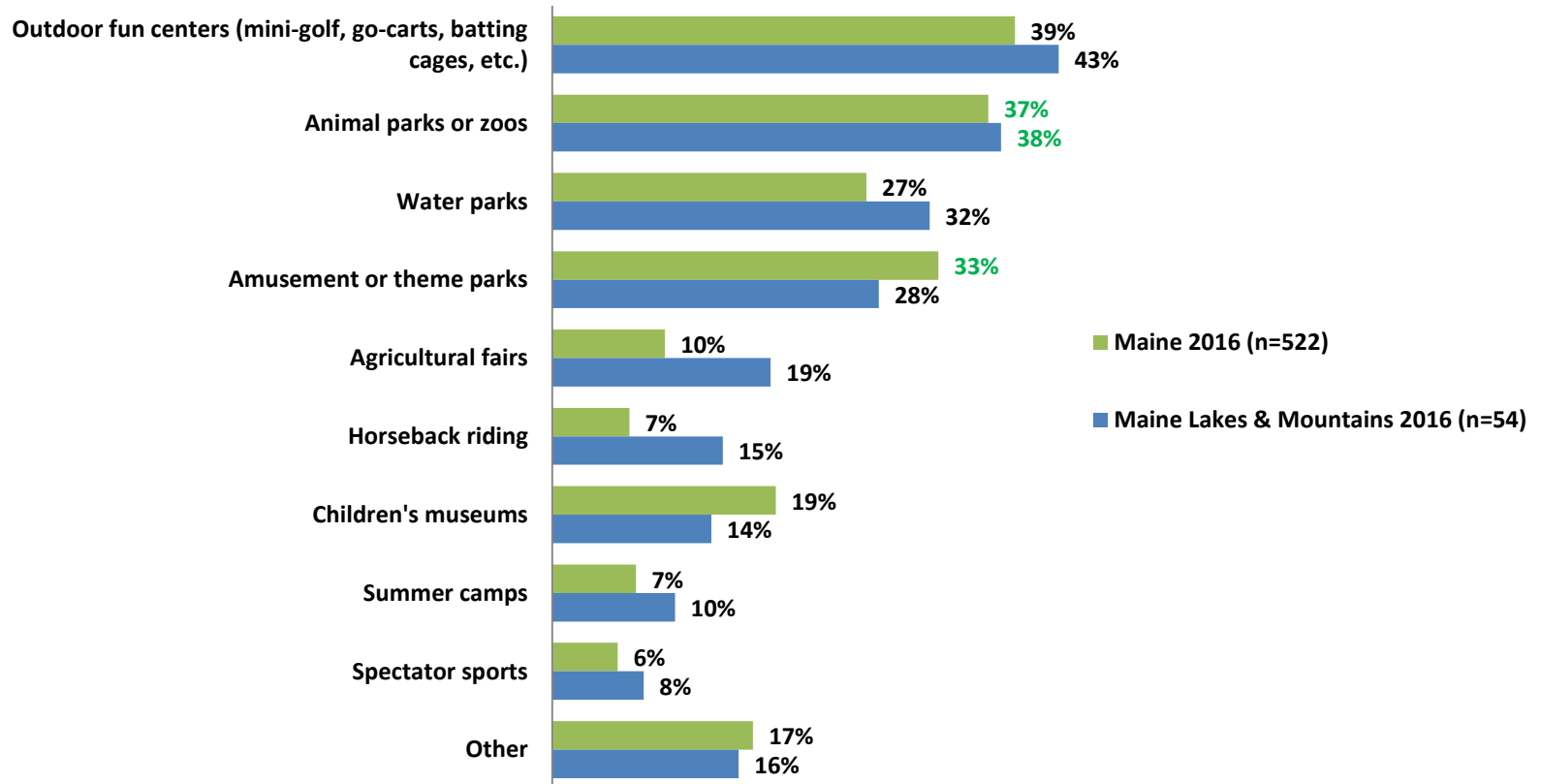Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

40

Outdoor fun centers and *animal parks/zoos* are visited by two in five day visitors who are 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

Activity	Maine 2016 (n=522)	Maine Lakes & Mountains 2016 (n=54)
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	39%	43%
Animal parks or zoos	37%	38%
Water parks	27%	32%
Amusement or theme parks	33%	28%
Agricultural fairs	10%	19%
Horseback riding	7%	15%
Children's museums	19%	14%
Summer camps	7%	10%
Spectator sports	6%	8%
Other	17%	16%

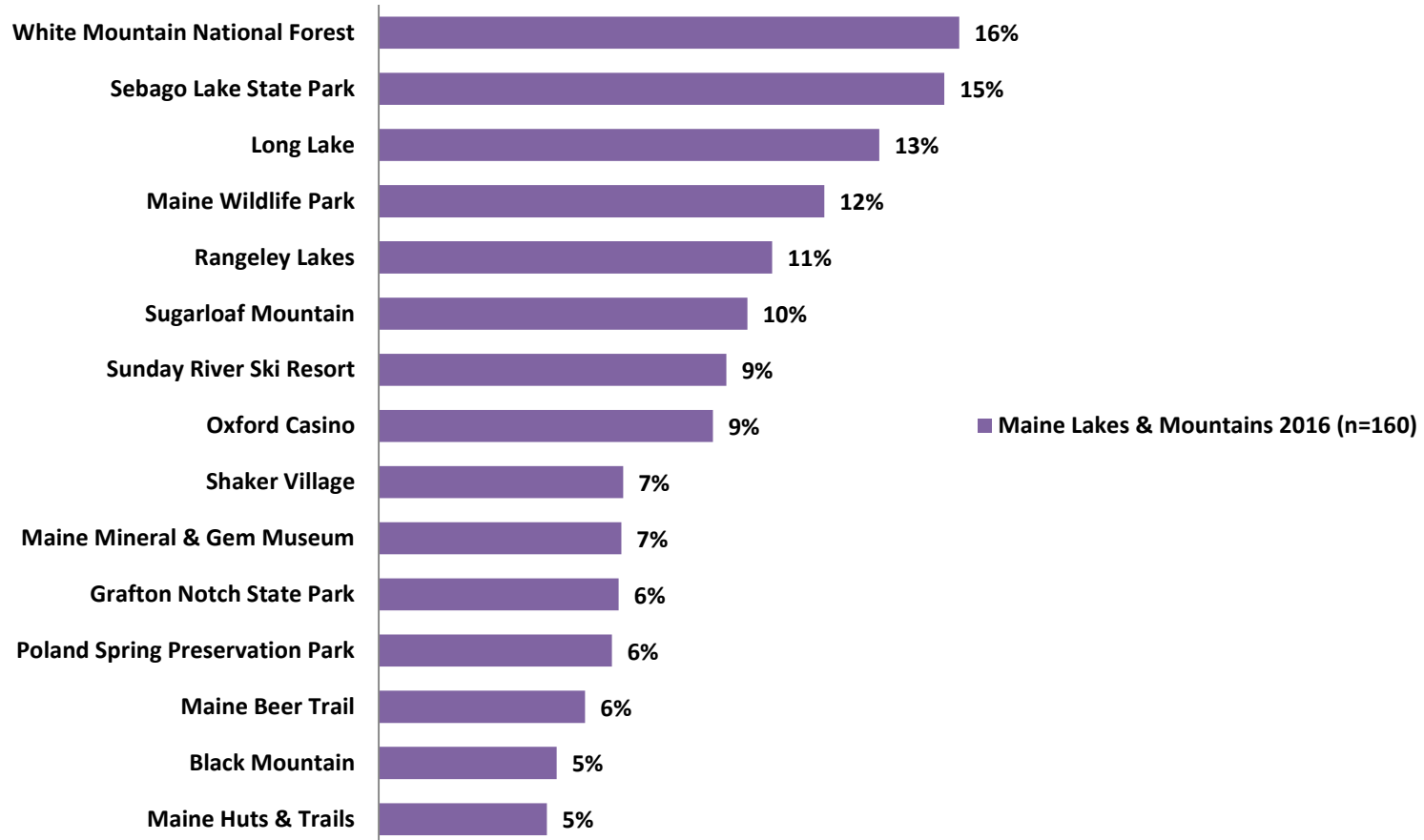- Maine 2016 (n=522)
- Maine Lakes & Mountains 2016 (n=54)

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.

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White Mountain National Forest and *Sebago Lake State Park* are popular destinations for day visitors.

Top Attractions/Locations Visited*

Location	Percentage
White Mountain National Forest	16%
Sebago Lake State Park	15%
Long Lake	13%
Maine Wildlife Park	12%
Rangeley Lakes	11%
Sugarloaf Mountain	10%
Sunday River Ski Resort	9%
Oxford Casino	9%
Shaker Village	7%
Maine Mineral & Gem Museum	7%
Grafton Notch State Park	6%
Poland Spring Preservation Park	6%
Maine Beer Trail	6%
Black Mountain	5%
Maine Huts & Trails	5%

■ Maine Lakes & Mountains 2016 (n=160)

* 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.
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Comparison of Maine Lakes & Mountains Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Maine Lakes & Mountains 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,
    - Travel interest areas, and
    - The activities they participate in while visiting.

- Popular trip activities and stated travel interest areas closely follow the outdoor and nature-oriented environment in the Lakes & Mountains region.

- Highlights of these differences are shown on the following pages.

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Visitor Origin

Compared to visitors to the entire State, visitors to the Maine Lakes & Mountains region differ in the following ways:

OVERNIGHT VISITORS

Greater proportion from **Mid-Atlantic states**

(specifically PA)

Lesser proportion from **New England**

(specifically MA and NH)

Visitor Status and Travel Party Composition

OVERNIGHT VISITORS

More likely to be **first-time visitors**

More likely to be **traveling with children**

Trip Interest Areas

OVERNIGHT AND DAY VISITORS

OVERNIGHT VISITORS

Less likely to want to pursue:

Food/beverage/culinary

Shopping

More likely to want to pursue:

Active outdoor activities

Trip Interests and Importance (Travel Driver Index)

OVERNIGHT AND DAY VISITORS

More likely to place importance on:

Active outdoor activities

Less likely to place importance on:

Food/beverage/culinary

Shopping

OVERNIGHT VISITORS ➔ **More** likely to place importance on **water activities**

Trip Activities

OVERNIGHT VISITORS

More likely to be:

Enjoying the **mountain views**

Visiting **Farmer's Markets**

Riding **all-terrain vehicles**

Less likely to be:

Enjoying the **ocean views/rocky coast**

Visiting **historic sites/museums**

Going to the **beach**

Trip Activities

DAY VISITORS

More likely to be:

Enjoying the **mountain views**

Canoeing/kayaking

Water skiing/jet skiing

Motor boating

Less likely to be:

Enjoying the **ocean views/rocky coast**

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

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