



# Maine Office of Tourism Visitor Tracking Research 2017 Calendar Year Annual Report *Regional Insights: Maine Lakes & Mountains*



*Prepared by*



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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 Maine’s visitor tracking research.

Research Objectives	Survey Instruments		
	National Travel Survey	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 generated by 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 2017, for travel to Maine occurring between December 2016 and November 2017. The number of respondents participating in each survey statewide is:

Research Component	2017 Completed Surveys
Overnight Visitor Survey	2,922
Day Visitor Survey	1,782
National Travel Survey	22,070

# Research Objectives and Methodology

- The following report provides a profile of visitors and their trips to the **Maine Lakes & Mountains** tourism region during 2017, including:
  - 344 overnight visitors, and
  - 185 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 2016 and 2017 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

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# Overnight Visitor Demographics

- Overnight visitors to the Maine Lakes & Mountains tourism region are 41 years old, on average, and have annual household incomes around \$90,000. Nearly two-thirds have at least a college degree or are employed full-time. Half are married.

Overnight Visitors	Maine 2017 (n=2922)	Maine Lakes & Mountains 2017 (n=344)
Age:		
< 35	39%	41%
35 - 44	23%	22%
45 - 54	16%	17%
55 +	22%	21%
Mean Age (Years)	40.7	40.9
Income:		
< \$50,000	23%	23%
\$50,000 - \$99,999	43%	44%
\$100,000 +	34%	33%
Mean Income	\$92,700	\$89,940
Female	70%	73%
College Degree or Higher	65%	62%
Married	50%	50%
Employed Full-Time	62%	63%

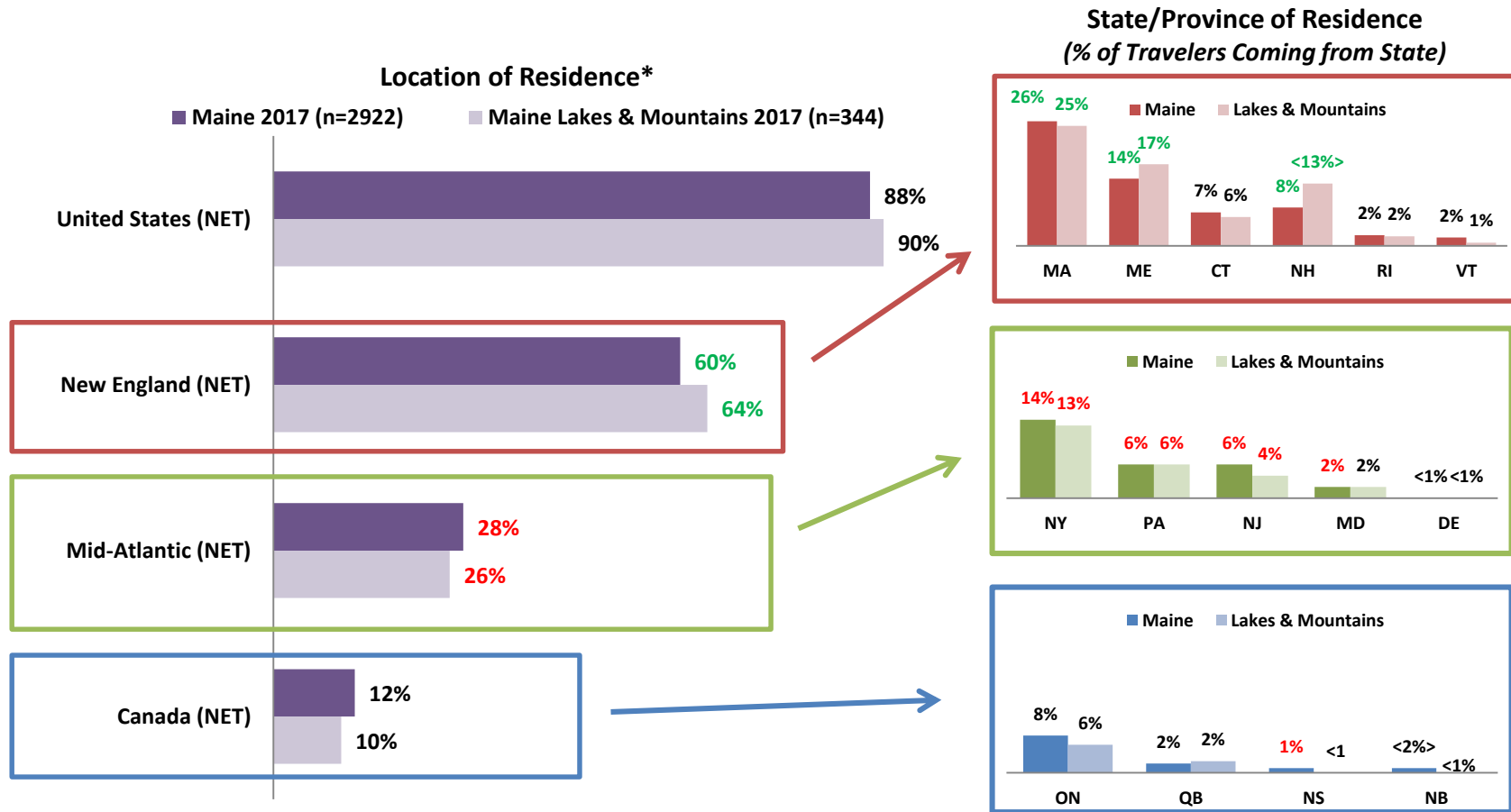
<> indicates a significant difference between this region and the State at the 95% confidence level.

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



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

- Overnight Lakes & Mountains visitors are more likely than Maine visitors overall to be from New Hampshire.



\*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.

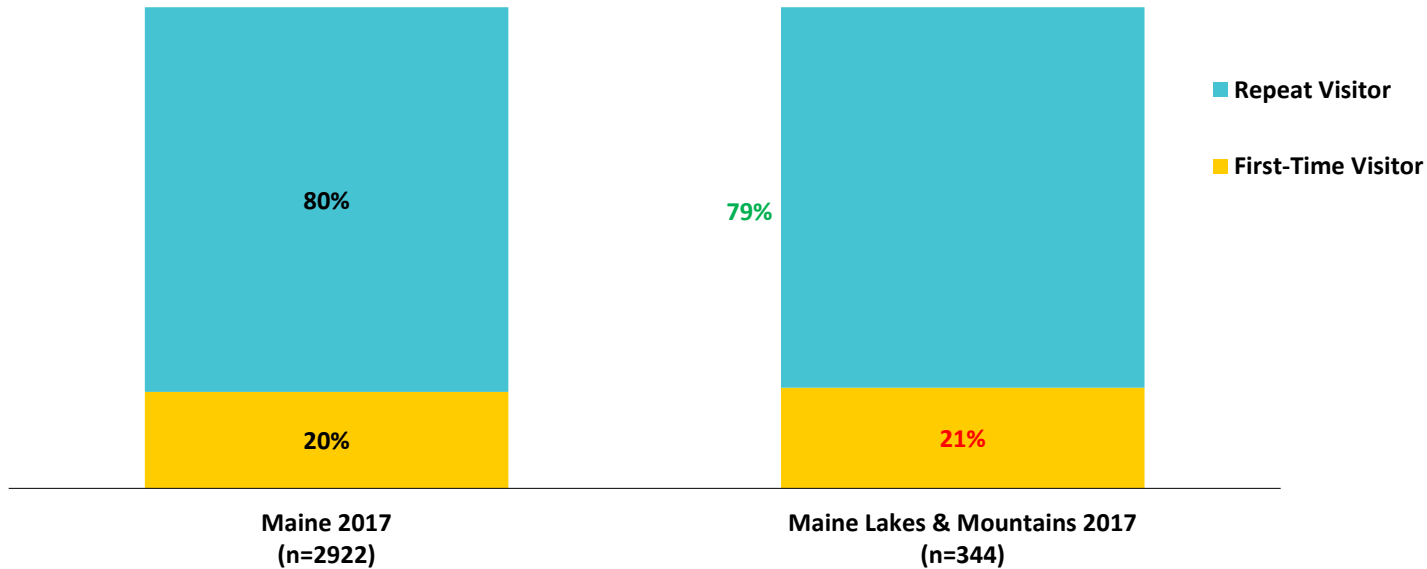
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

# One-fifth of overnight visitors to the Lakes & Mountains region are first-time visitors to Maine.

- 2017 saw a drop in overnight *first-time* visitors to the Lakes & Mountains region and an increase in *repeat* visitors.

## Repeat vs. First-Time Visitors



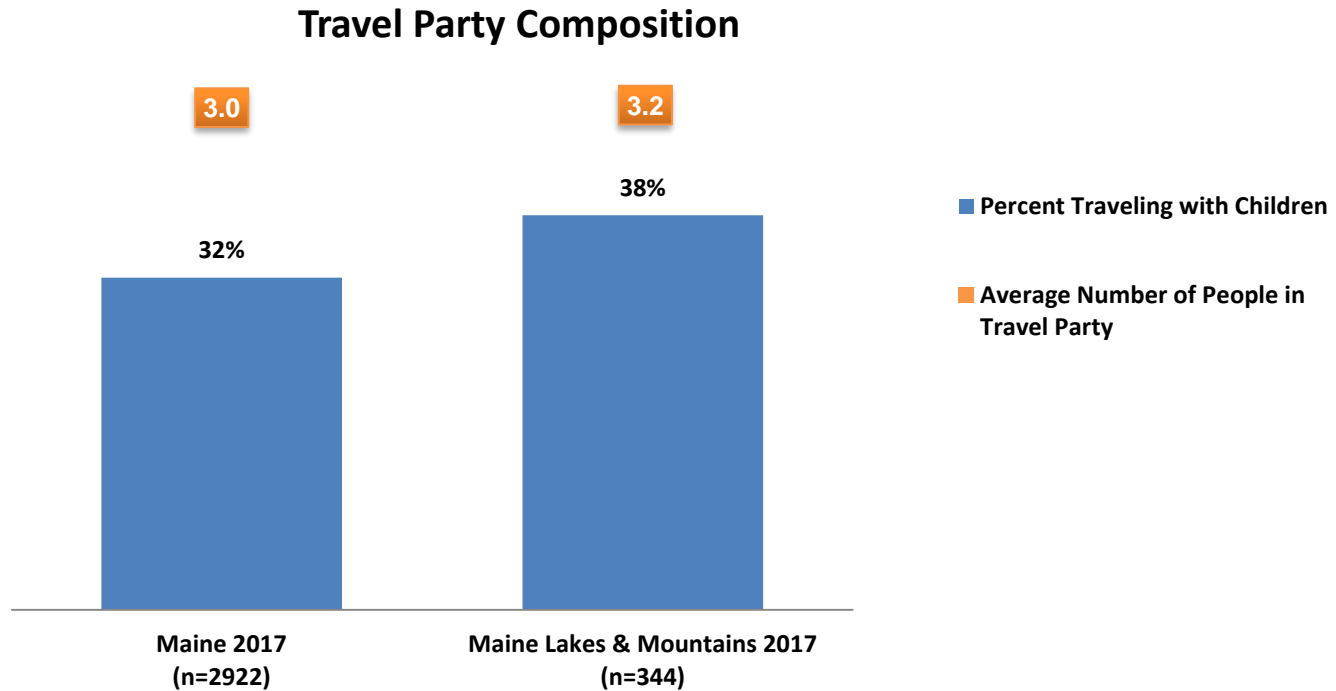
Q11. Was this your first visit in Maine?

<> indicates a significant difference between this region and the State 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.

- On average, overnight visitors to the Lakes & Mountains region travel in parties of three.



Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q25. How many of these people were: Children?

<> indicates a significant difference between this region and the State at the 95% confidence level.

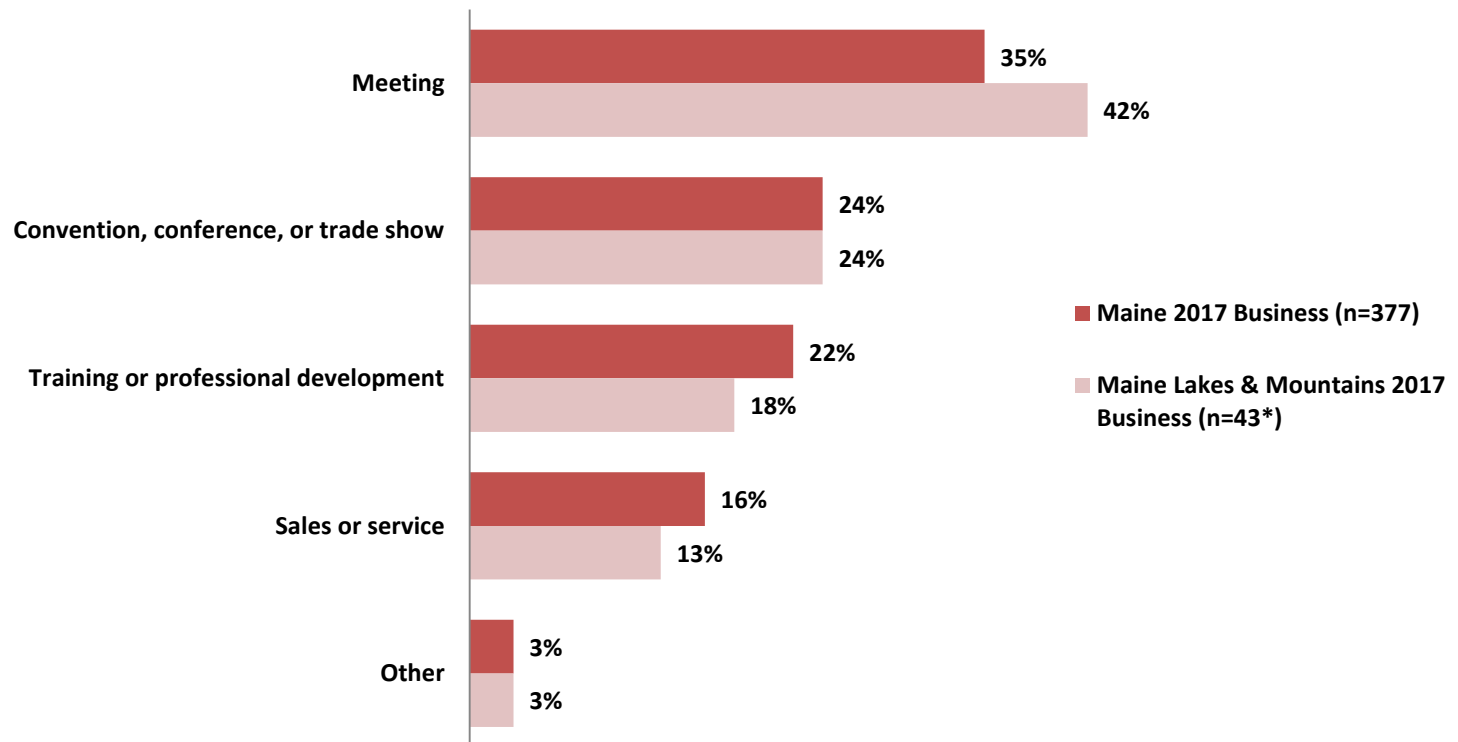
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight Visitors: Trip Experience

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

## Primary Purpose of Overnight Business Trips



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

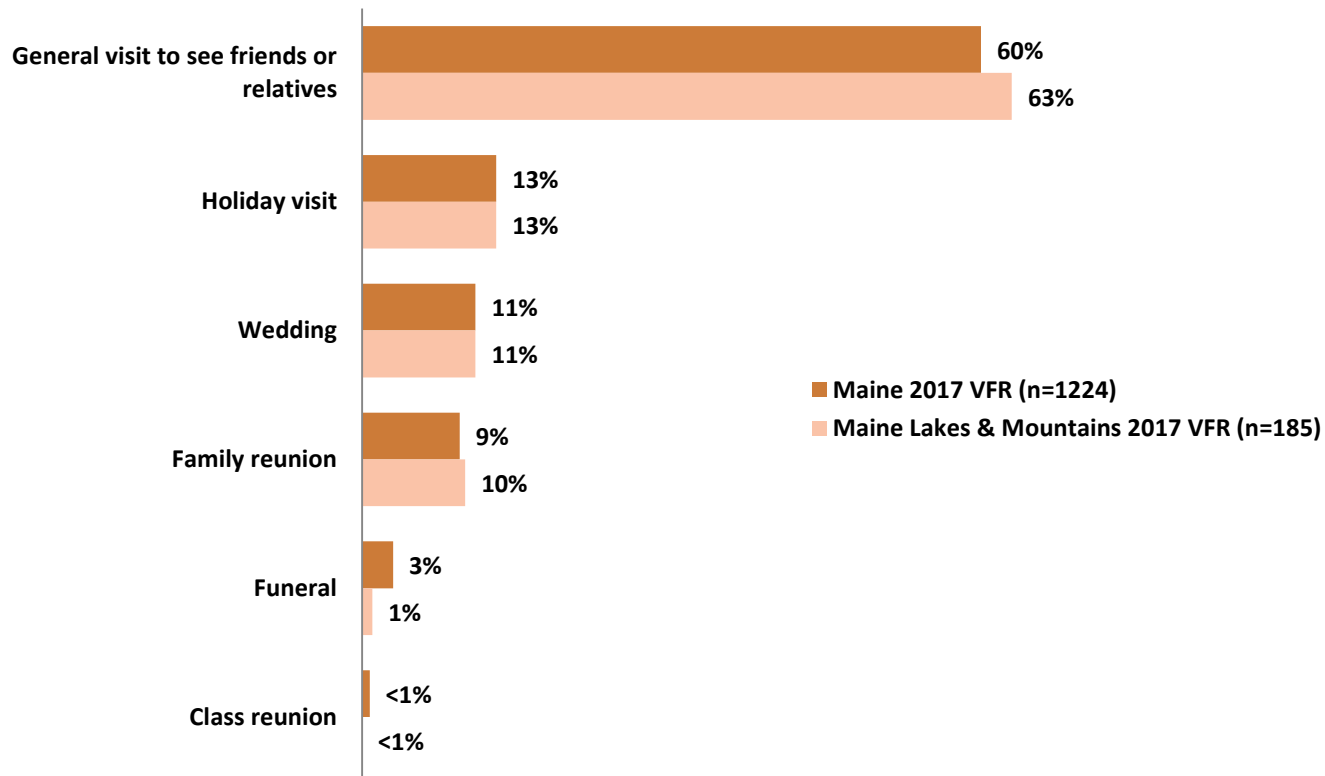
<> indicates a significant difference between this region and the State at the 95% confidence level.

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.

# 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



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

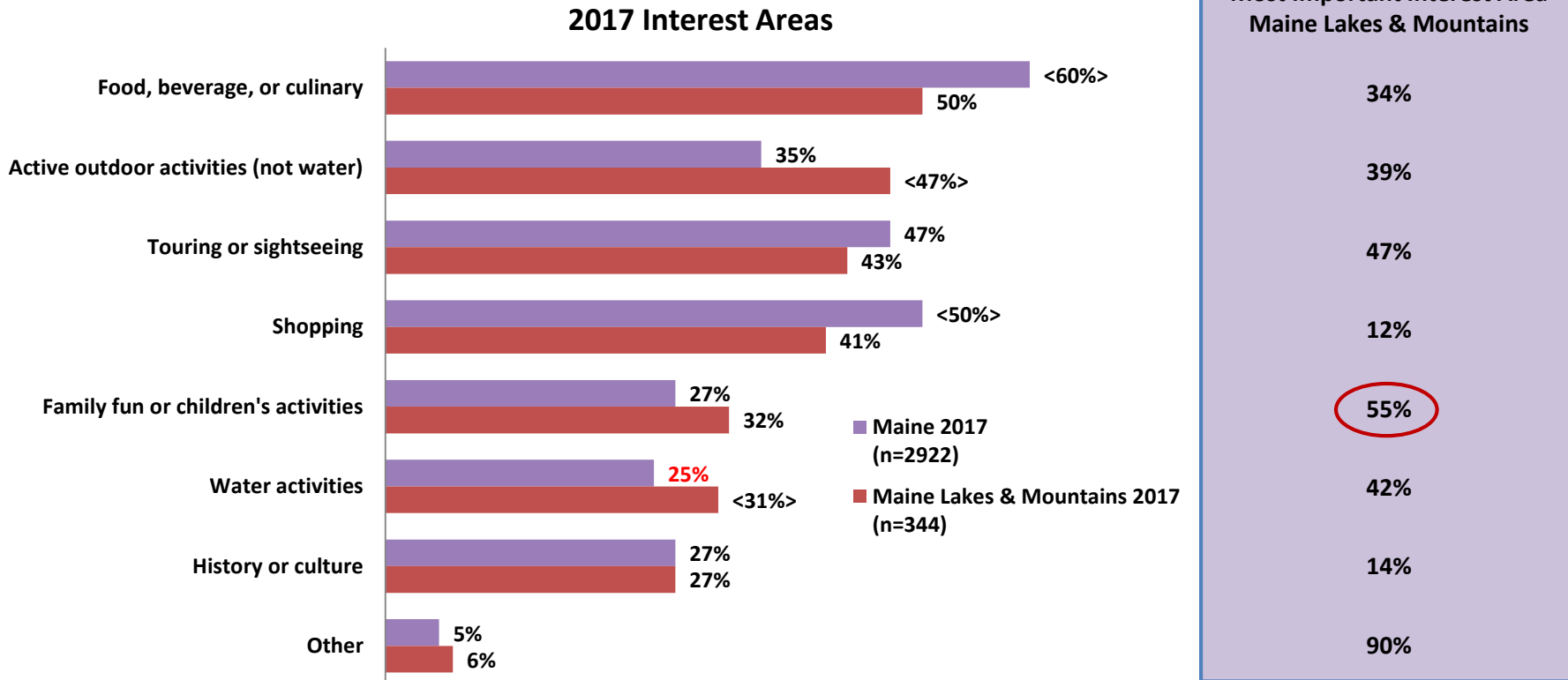
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

\*VFR = Visiting Friends and Relatives

## Food/beverage/culinary and active outdoor activities are the most common travel interest areas among overnight visitors to this region.

- Although *food/beverage/culinary* activities are among the most common areas of interest for overnight visitors to the Maine Lakes & Mountains, 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* and *water activities* than are overnight visitors to the State as a whole.



Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

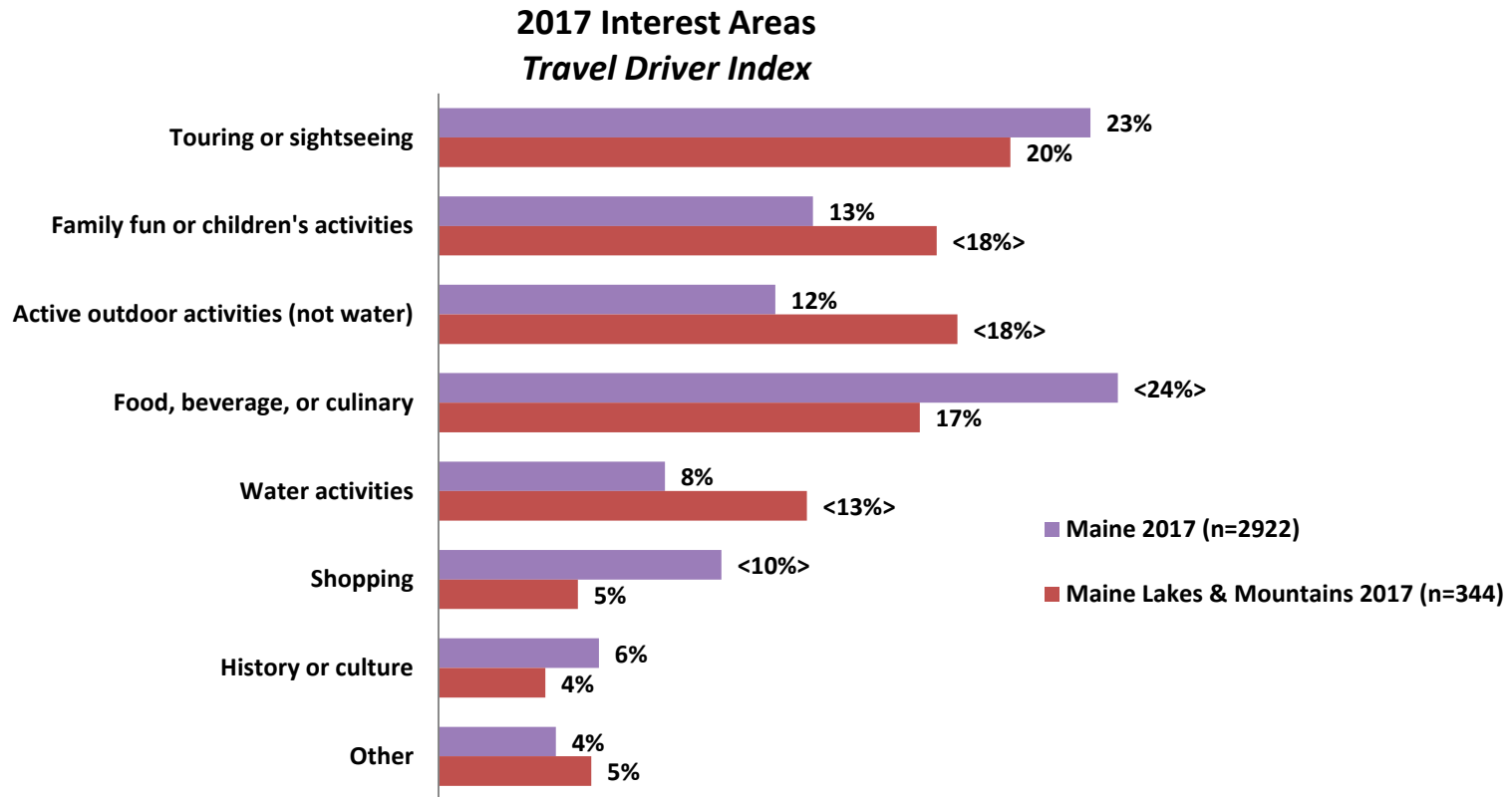
Q36. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

<> indicates a significant difference between this region and the State 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* ranks highest among overnight visitors to this region.

- *Family fun/children’s activities, active outdoor activities, and food/beverage/culinary activities* also rank high in terms of interest and importance in deciding to visit.
- Some interest areas are more important for overnight visitors to the Lakes & Mountains region than for the State as a whole – *family fun/children’s activities, active outdoor activities and water activities*. *Food/beverage/culinary and shopping activities* are ranked lower among visitors to this region than among visitors to Maine overall.



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

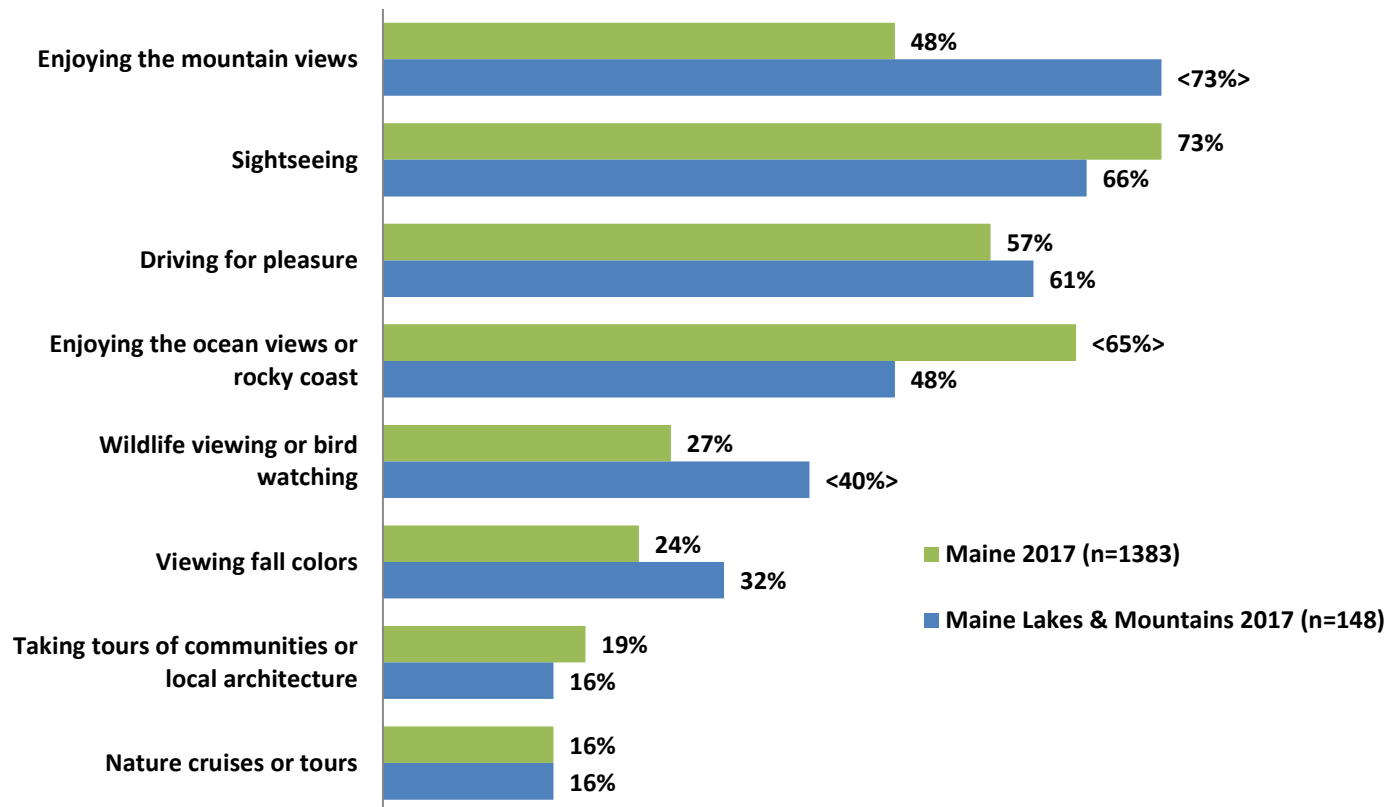


# Enjoying the mountain views, sightseeing, and driving for pleasure are the most common touring/sightseeing activities among overnight visitors to the region.

- Overnight visitors to the Lakes & Mountains region are more likely than overnight visitors to the State as a whole to spend time *enjoying the mountain views* and *viewing wildlife/bird watching*, 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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

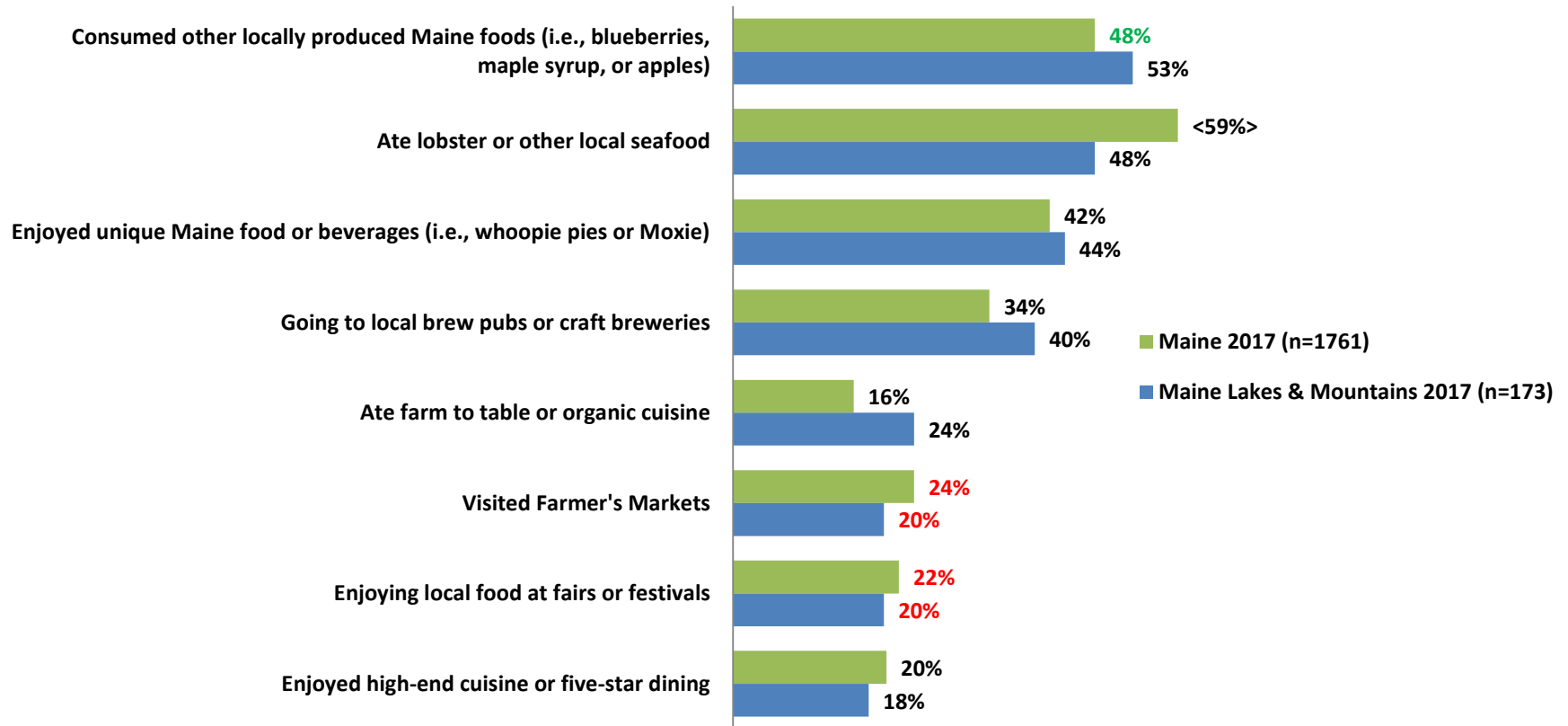
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# The top food/beverage/culinary activities among overnight visitors to this region are *consuming locally produced Maine foods and eating lobster or other local seafood*.

- Visitors to this region are less likely than visitors to the State overall to *eat lobster or other local seafood* 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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

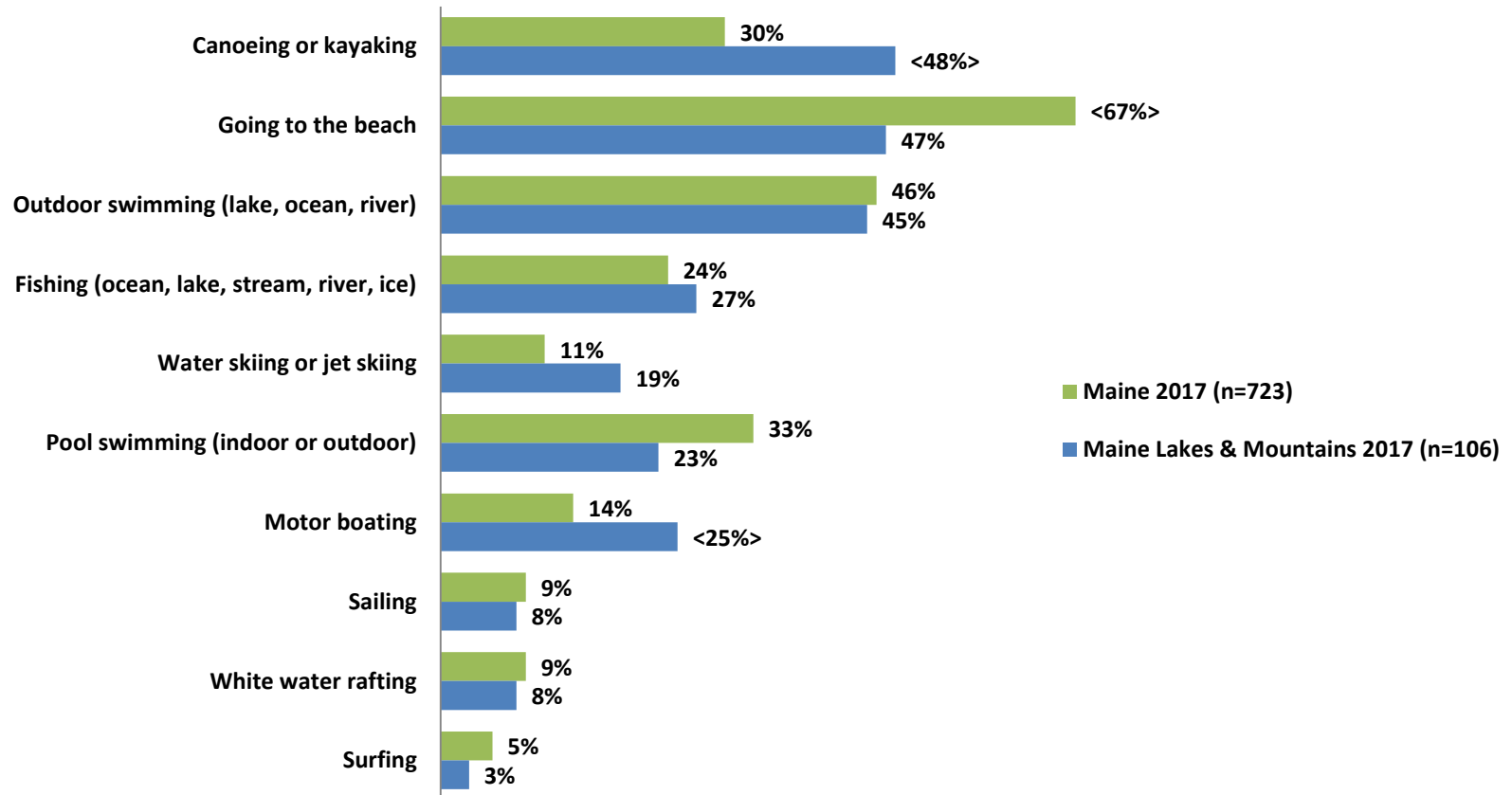
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Canoeing/kayaking, going to the beach, and outdoor swimming are pursued by roughly half of overnight visitors to the Lakes & Mountains region who are interested in water activities.

- Canoeing/kayaking and motor boating are more popular in this region than in the State of Maine overall, while going to the beach is less popular.

## Water Activities

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



Q37. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between this region and the State at the 95% confidence level.

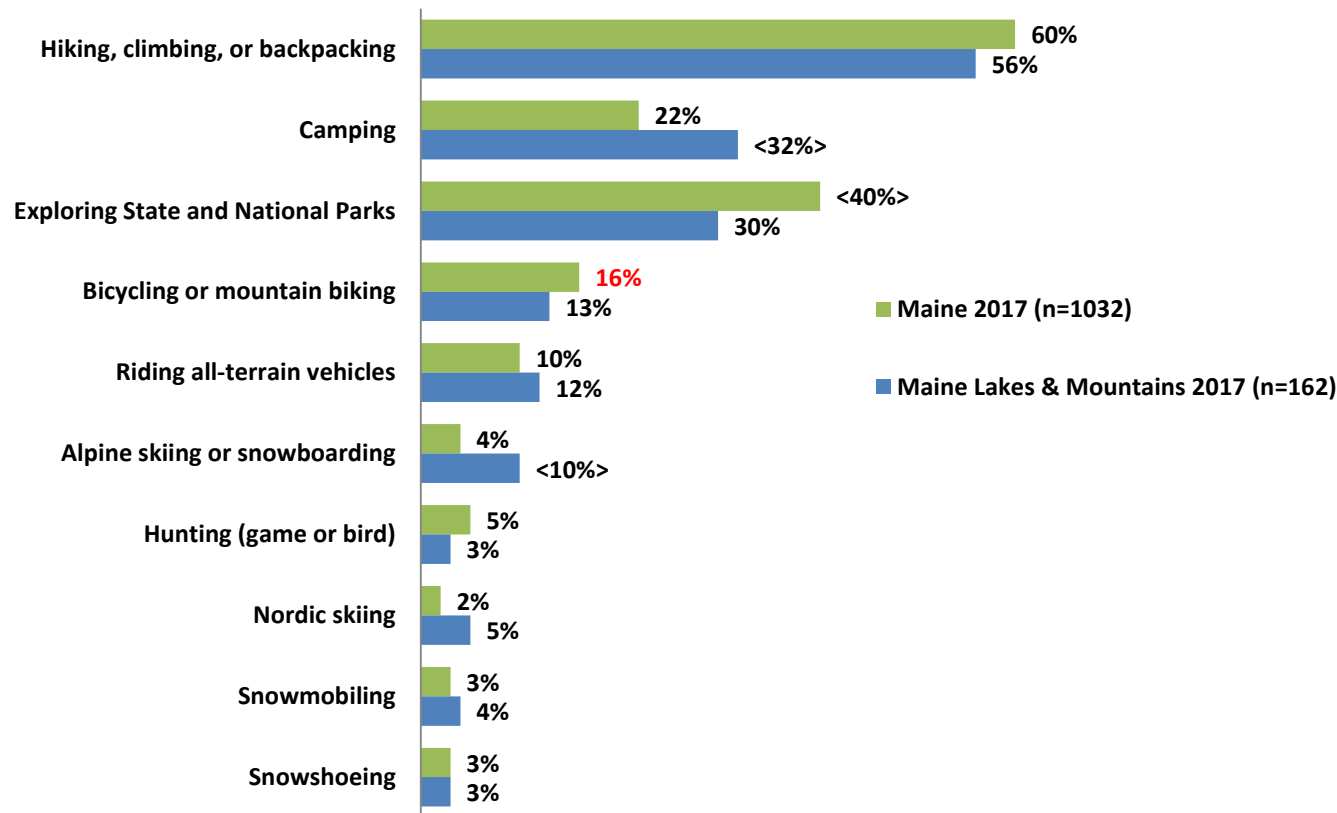
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# 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 are more likely to *go camping* and *do some alpine skiing/snowboarding* 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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

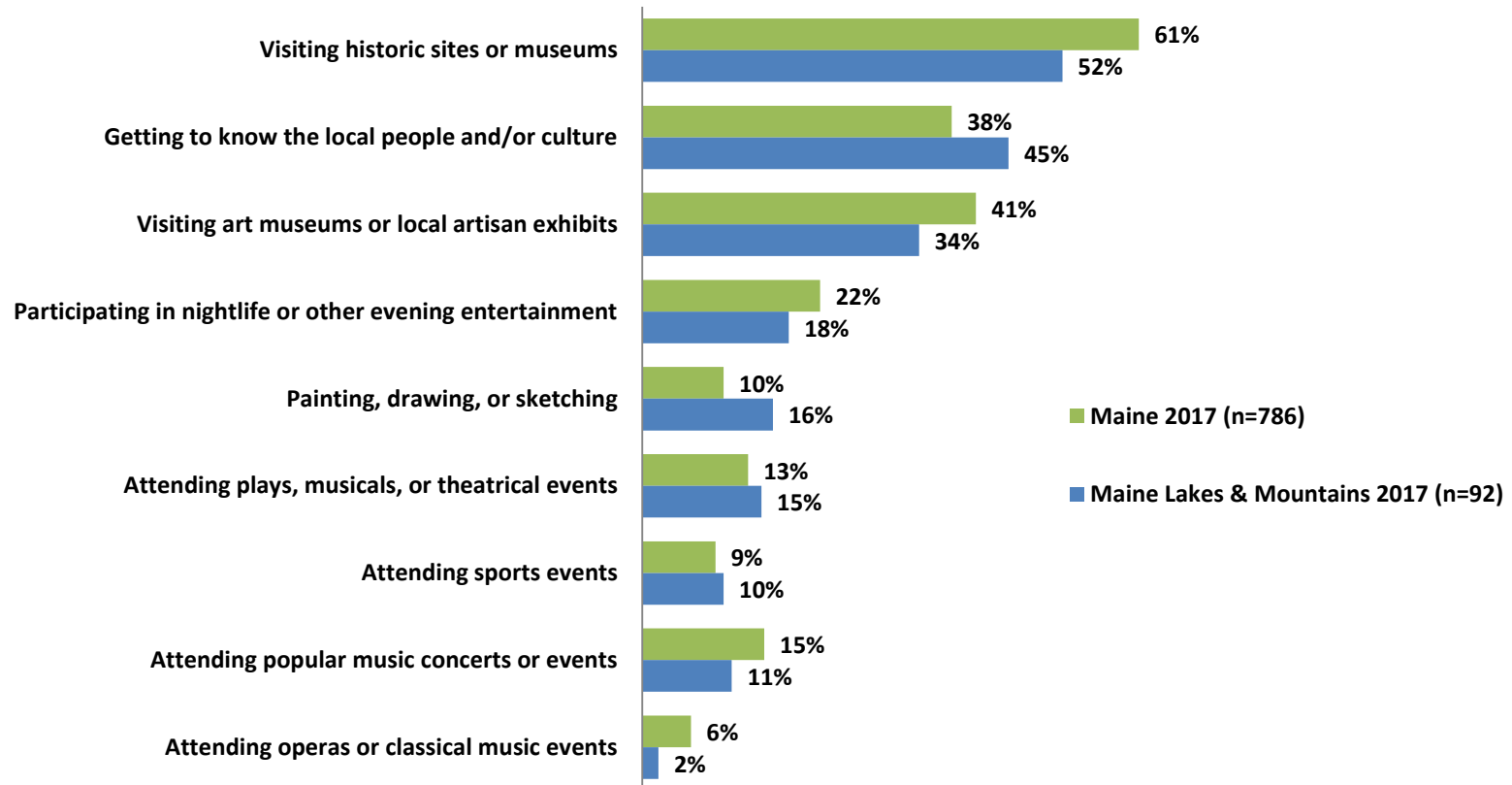
<> indicates a significant difference between this region and the State at the 95% confidence level.

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# About half of overnight visitors interested in history or culture *visit historic sites/museums* or spend time *getting to know the local people/culture* while in the Lakes & Mountains region.

## History or Culture Activities

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

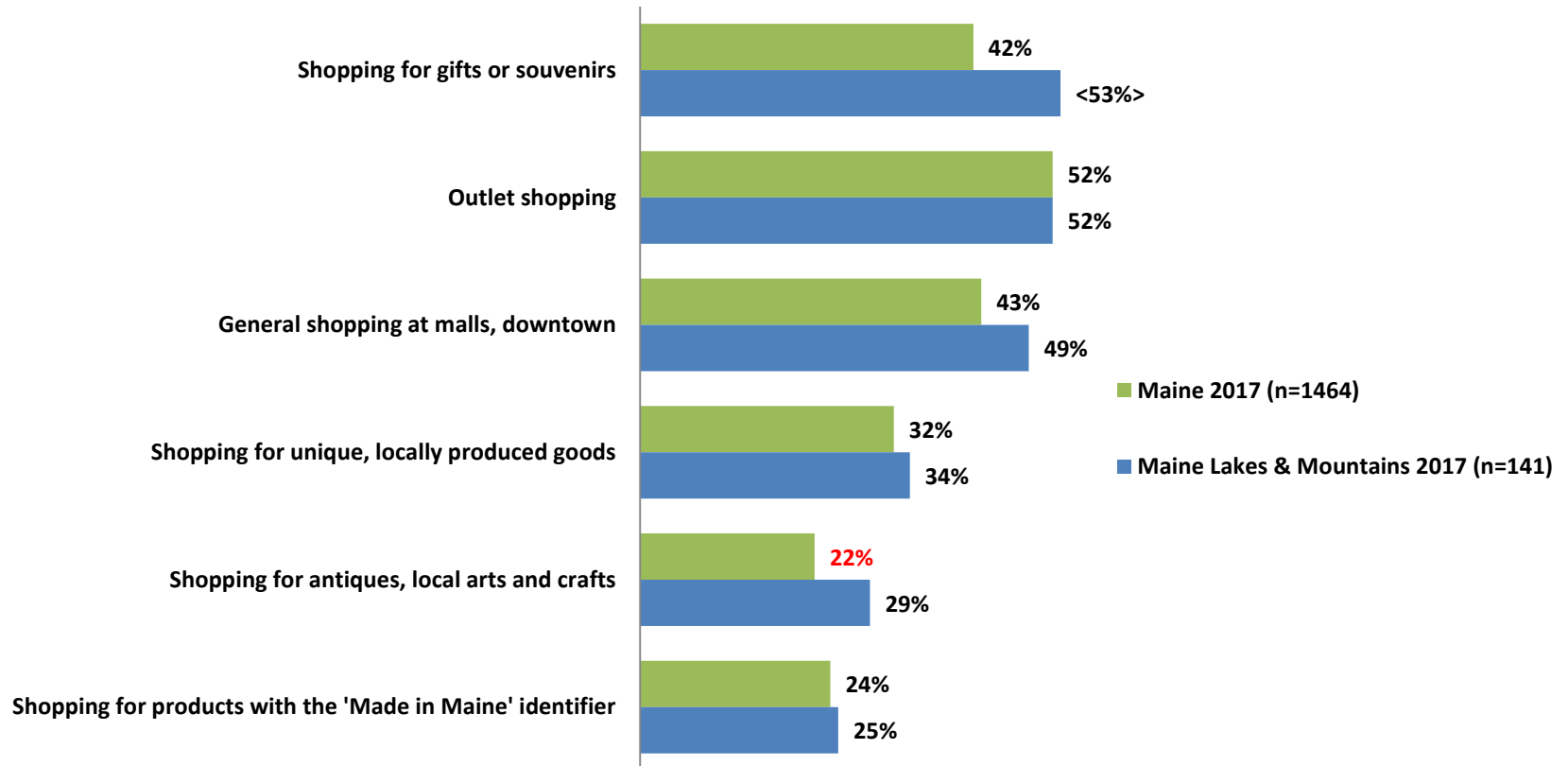
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight visitors to the Lakes & Mountains region who are interested in shopping shop in a variety of places.

- Lakes & Mountains visitors interested in shopping are more likely than visitors to the State as a whole to *shop for gifts or souvenirs* while in the area.

## Shopping Activities

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

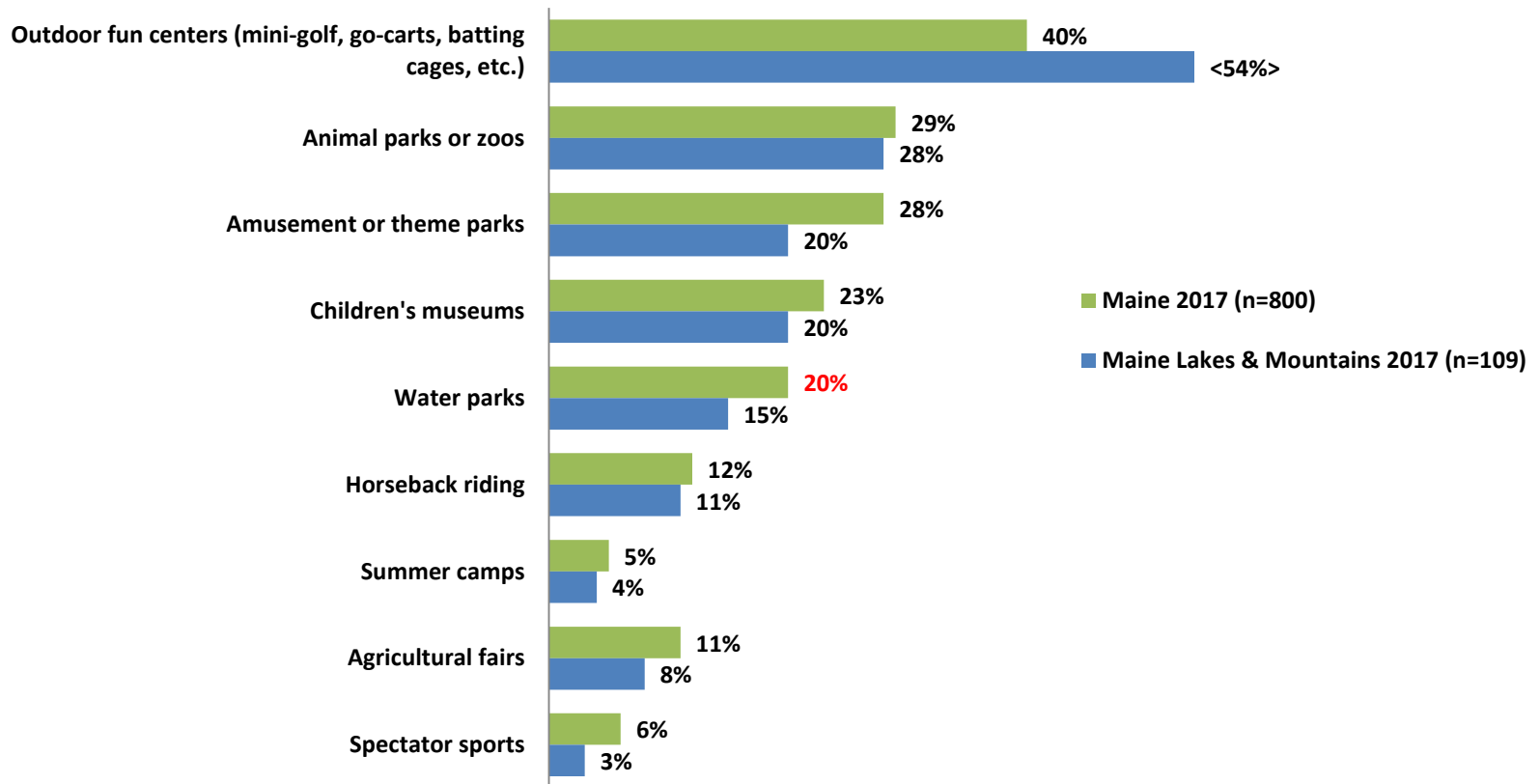
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Outdoor fun centers are a more popular activity among overnight visitors to the Lakes & Mountains region than among visitors to the State as a whole.

## Family Fun/Children's Activities

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



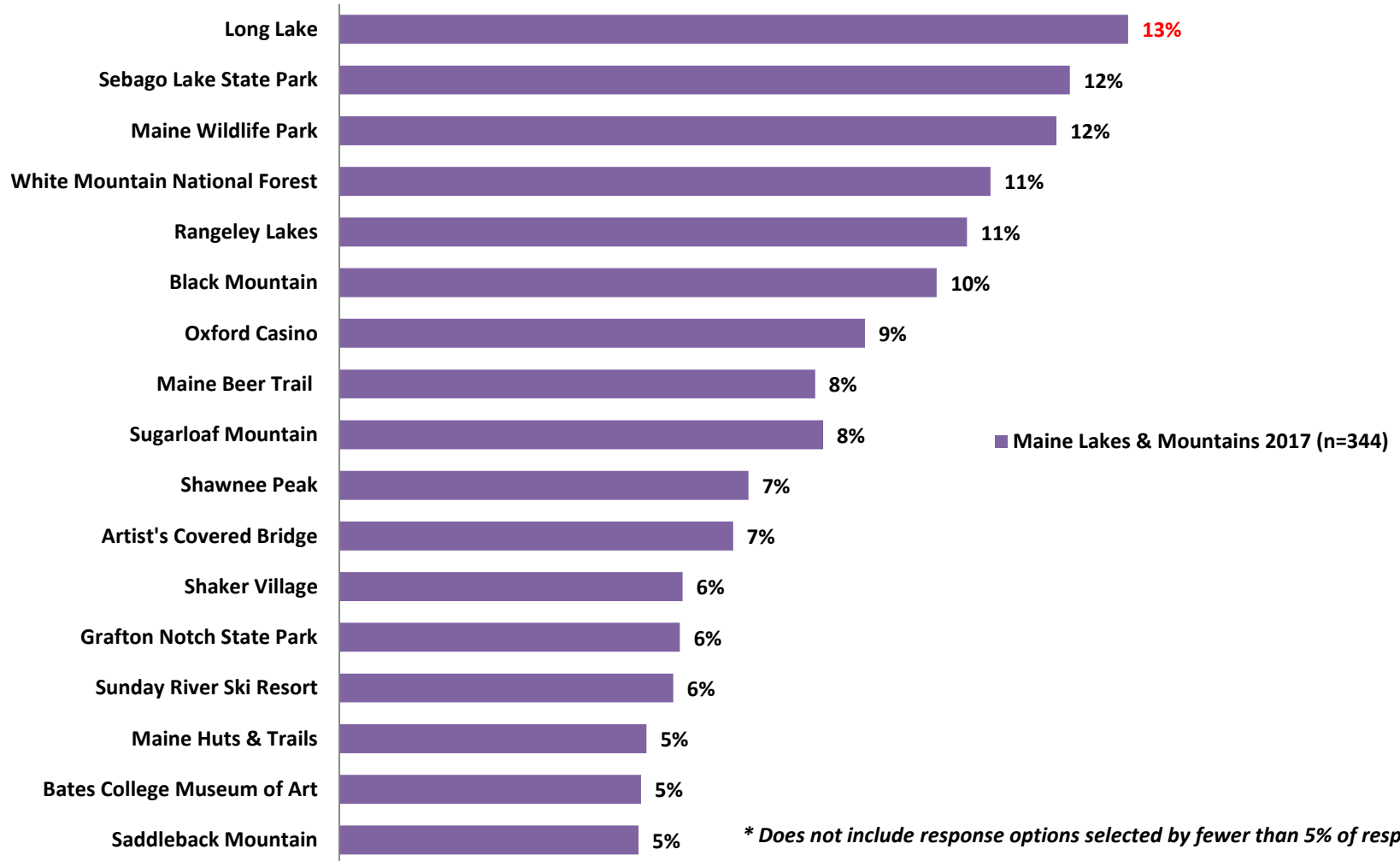
Q37. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between this region and the State 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.

# A number of attractions/locations in the Lakes & Mountains region are equally popular among overnight visitors.

## Top Attractions/Locations Visited\*



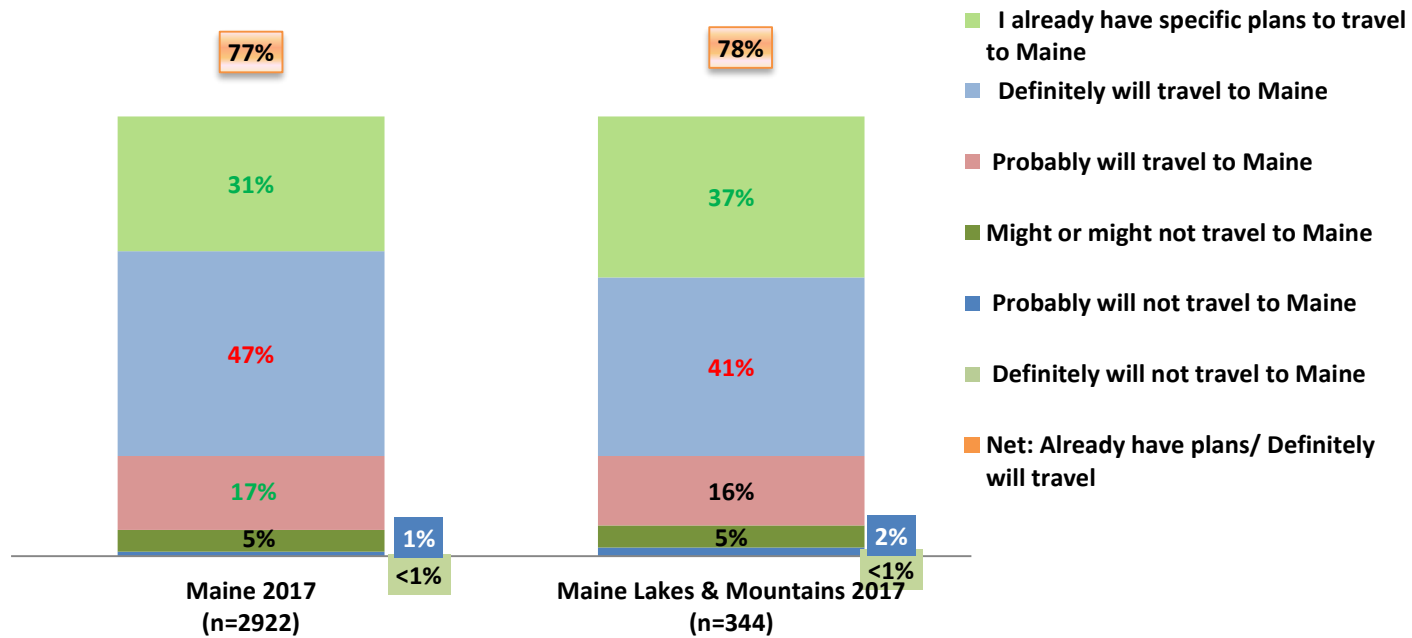
Q32: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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



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

## Future Travel Likelihood



Q44. How likely will you be to travel in Maine in the next two years?

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# Day Visitors: Traveler Description

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# Day Visitor Demographics

- Day visitors to the Maine Lakes & Mountains region average 41 years of age and earn about \$78,000 annually. Half have a college degree, and more than half are employed full-time. Fifty-two percent are married.

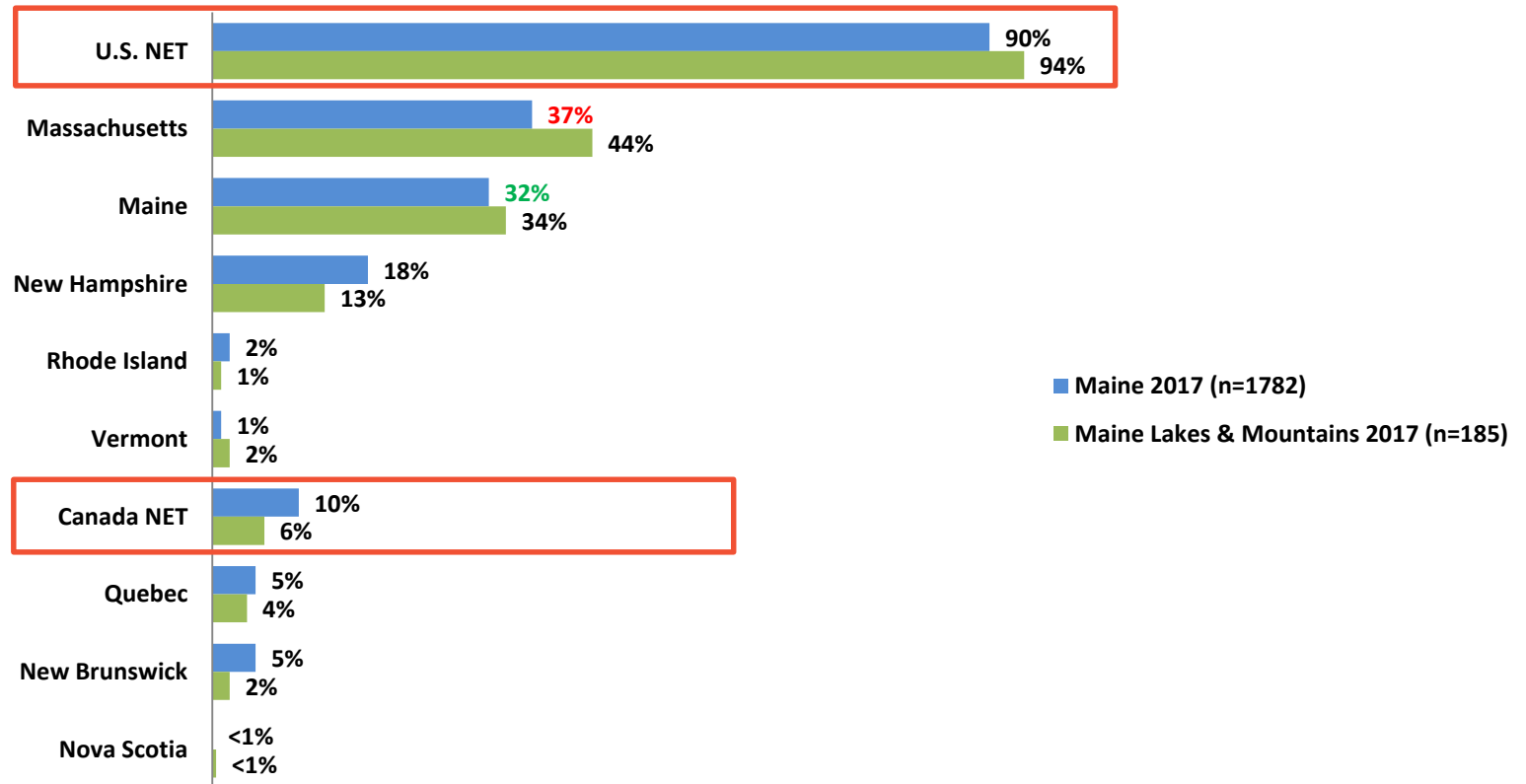
Day Visitors	Maine 2017 (n=1782)	Maine Lakes & Mountains 2017 (n=185)
Age:		
< 35	33%	41%
35 - 44	19%	20%
45 - 54	19%	18%
55 +	<29%>	22%
Mean Age (Years)	<44.1>	40.9
Income:		
< \$50,000	32%	39%
\$50,000 - \$99,999	41%	36%
\$100,000 +	27%	24%
Mean Income	\$80,800	\$77,900
Female	76%	74%
College Degree or Higher	54%	51%
Married	48%	52%
Employed Full-Time	52%	55%

<> indicates a significant difference between this region and the State 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 Lakes & Mountains region come from similar areas as day visitors to the State as a whole, with nine in ten coming from the United States.

### State/ Province of Residence



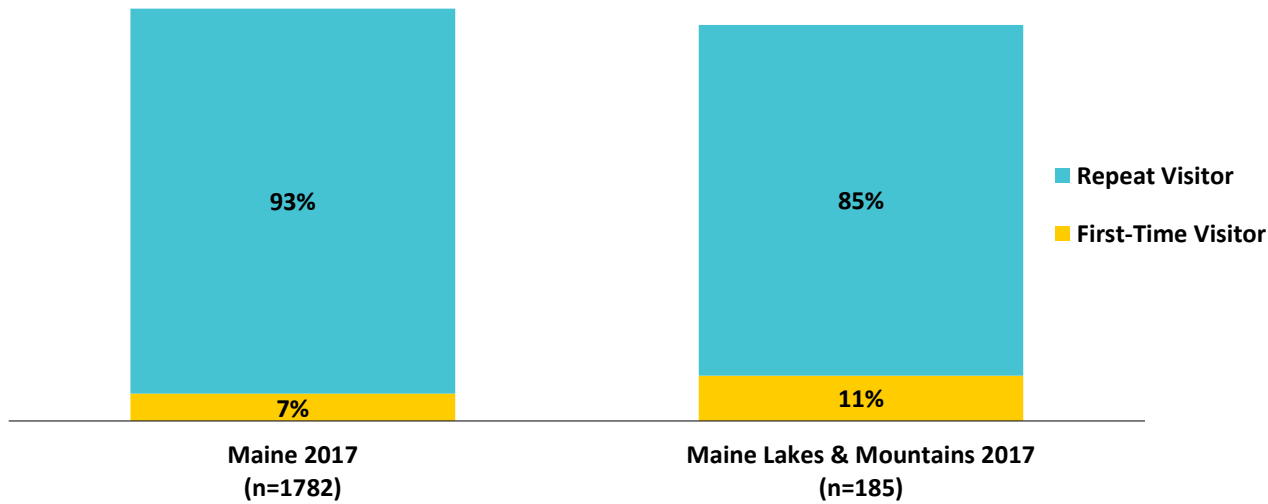
Q2. In what State or Province do you reside?

<> indicates a significant difference between this region and the State at the 95% confidence level.

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# Only one-tenth of day visitors to the Lakes & Mountains region are visiting Maine for the first time.

## Repeat vs. First-Time Visitors

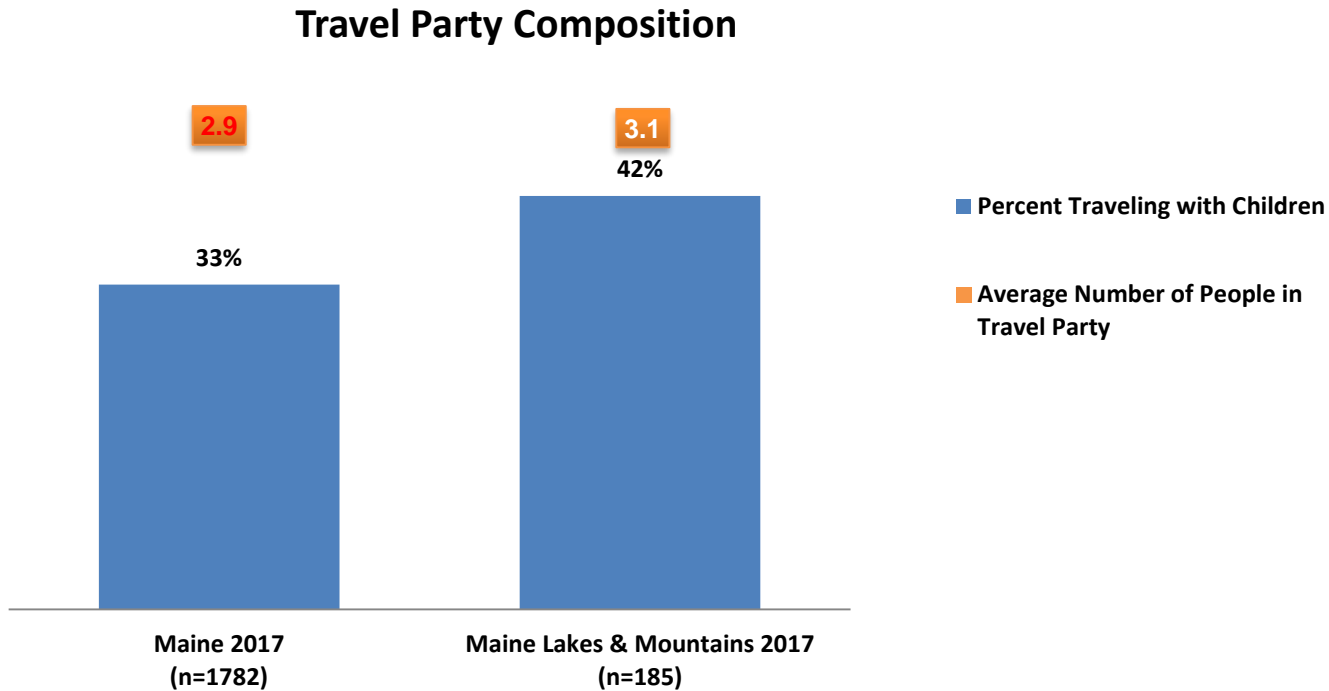


Q10. Was this your first trip to Maine?

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



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

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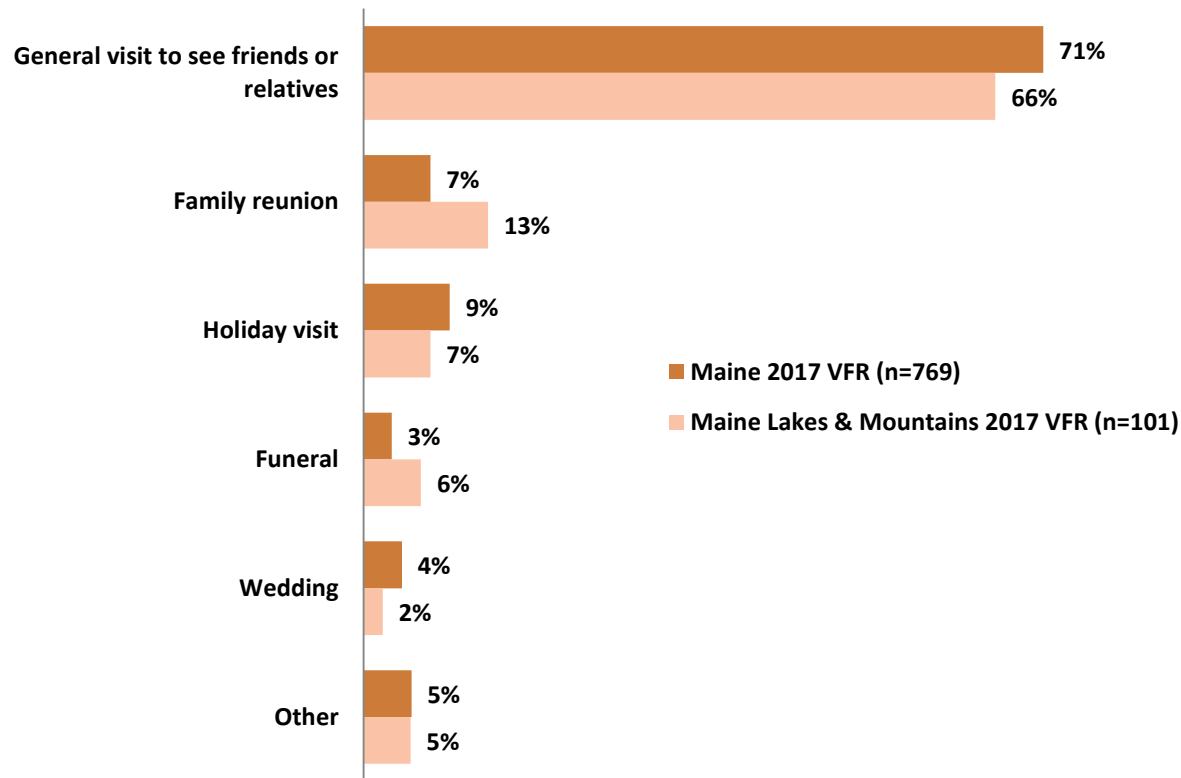
## Sample Size Exclusions

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)

# Two-thirds of VFR day visitors cite a *general visit to see friends or relatives* as the primary purpose of their trip.

## Primary Purpose of Day VFR\* Trips



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

<> indicates a significant difference between this region and the State at the 95% confidence level.

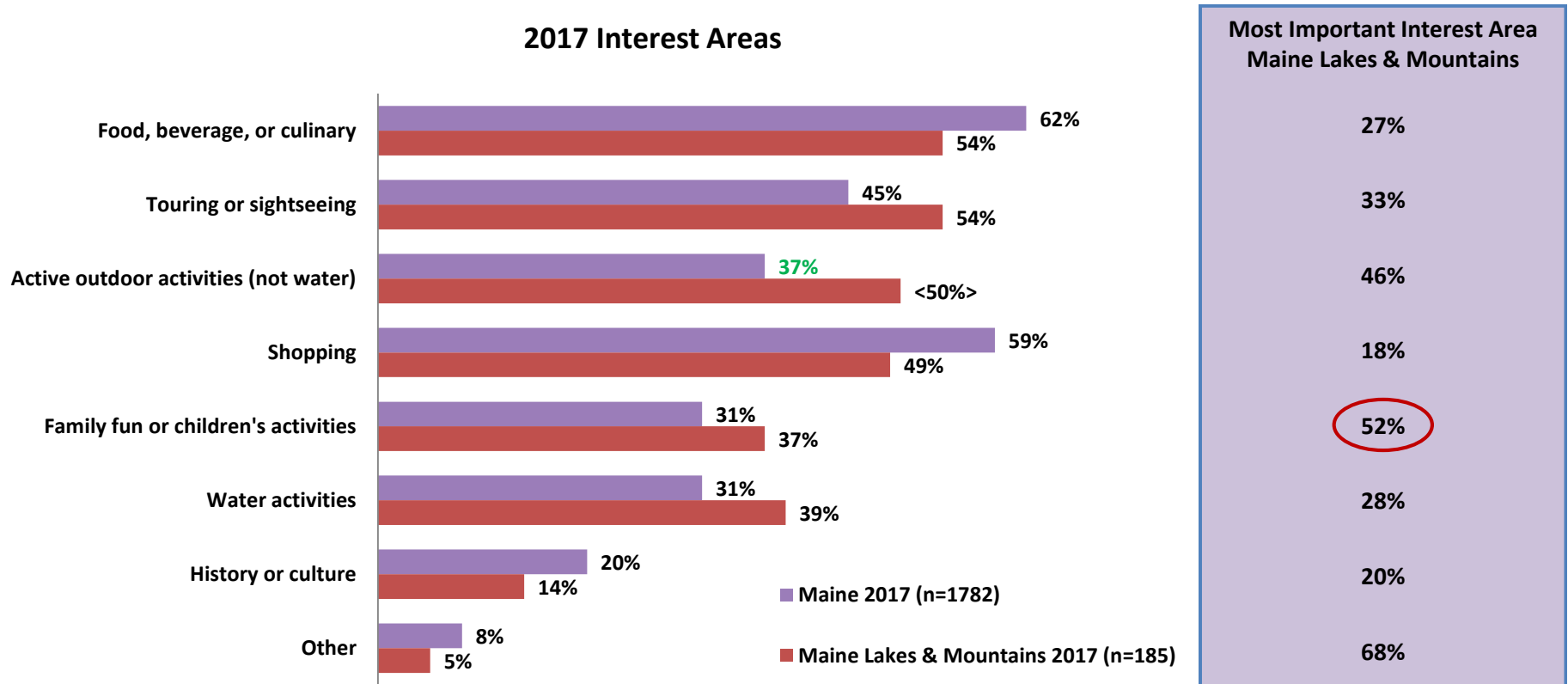
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

\*VFR = Visiting Friends and Relatives



# Day visitors to this 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 more likely to be interested in *active outdoor activities*.



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

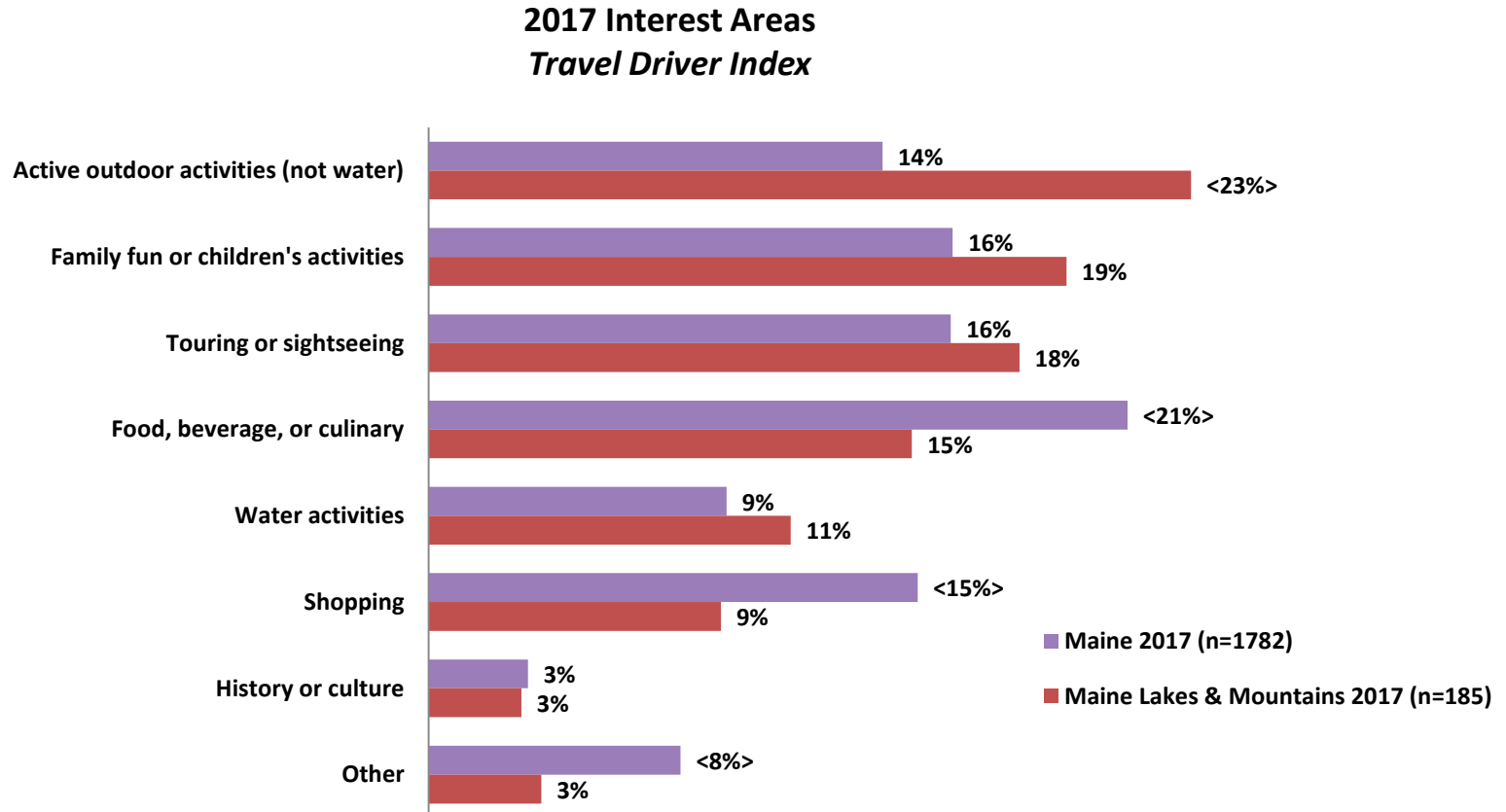
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

<> indicates a significant difference between this region and the State 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, *active outdoor activities* rank highest among day visitors to the Lakes & Mountains.

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



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

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 this region and the State at the 95% confidence level.

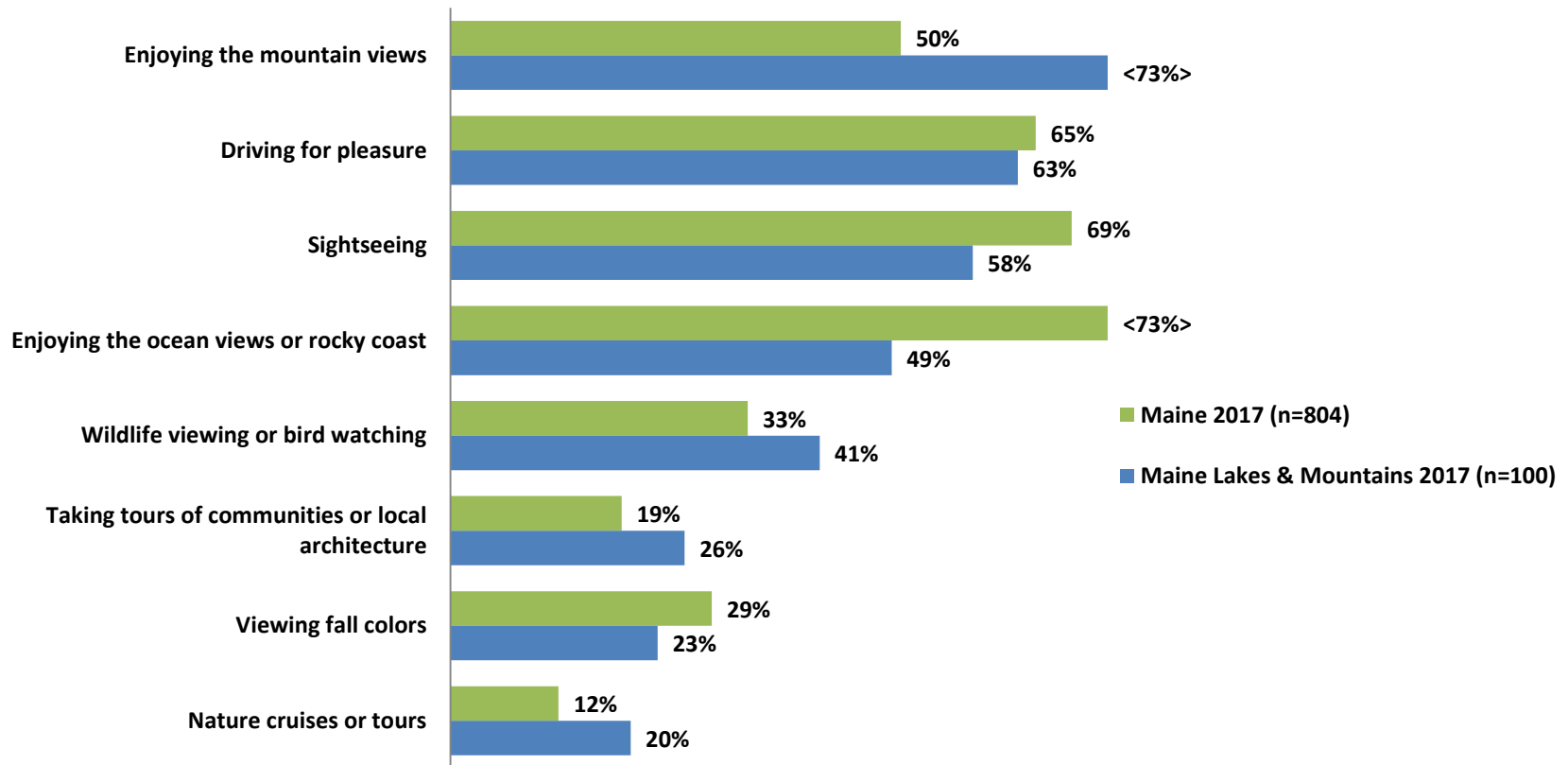
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Enjoying the mountain views is the most common touring/sightseeing activity among day visitors to this region.

- Day visitors to the Lakes & Mountains region are more likely than Maine visitors overall to *enjoy mountain views*, and less likely to *enjoy ocean views*.

## 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.*

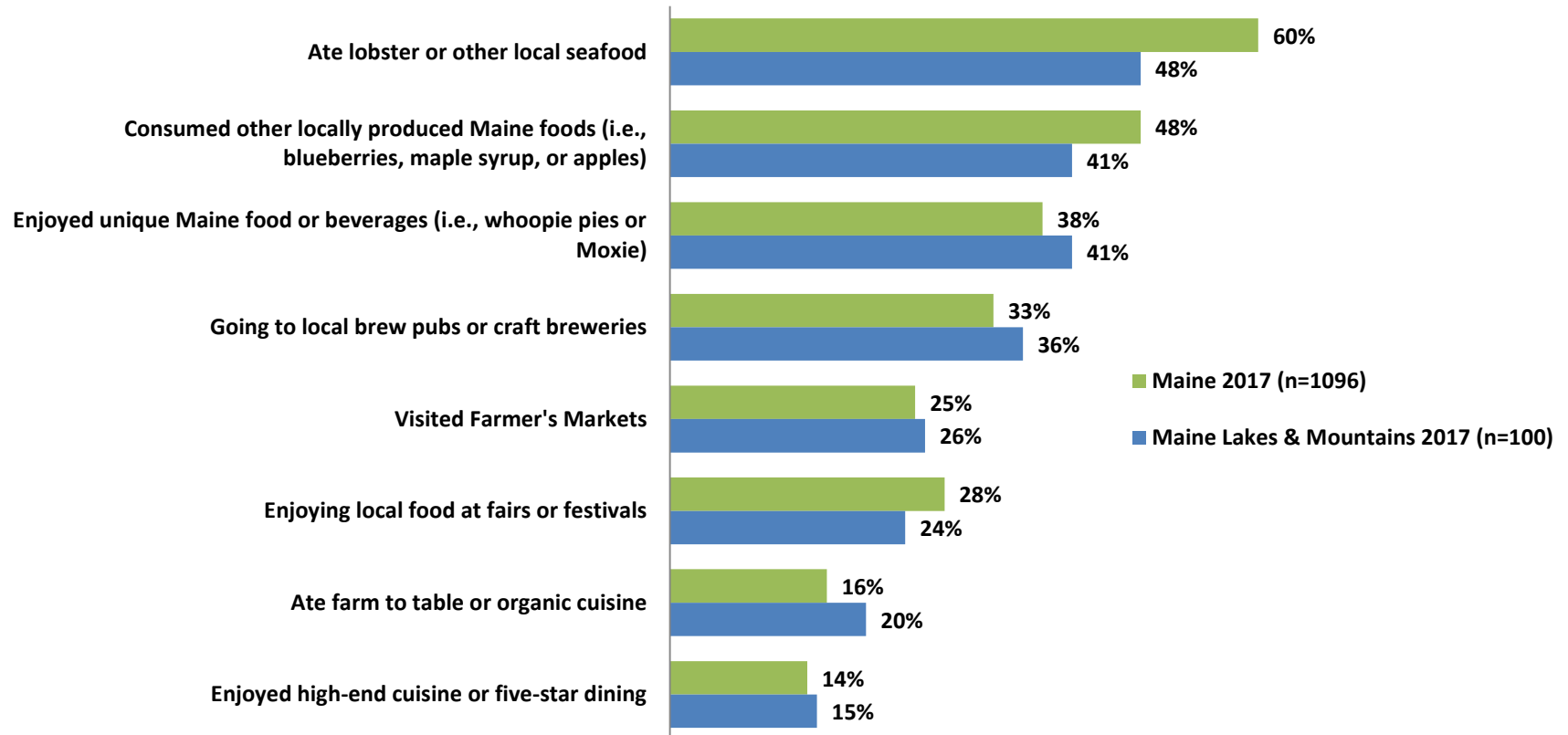
<> indicates a significant difference between this region and the State at the 95% confidence level.

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 interested in food/beverage/culinary activities *eat lobster or other local 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



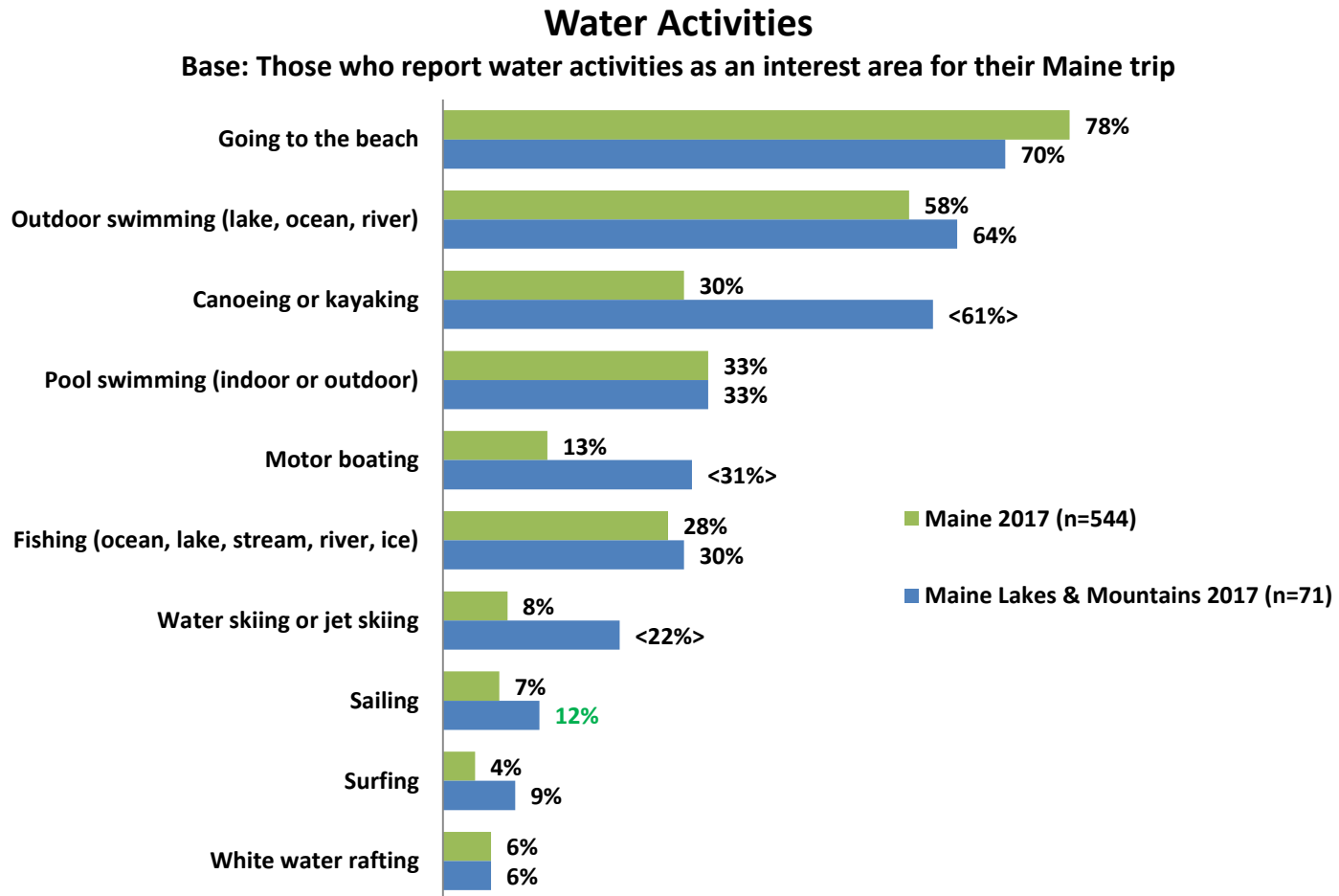
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State 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.

# Seven in ten day visitors to this region who are interested in water activities report *going to the beach* 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.



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

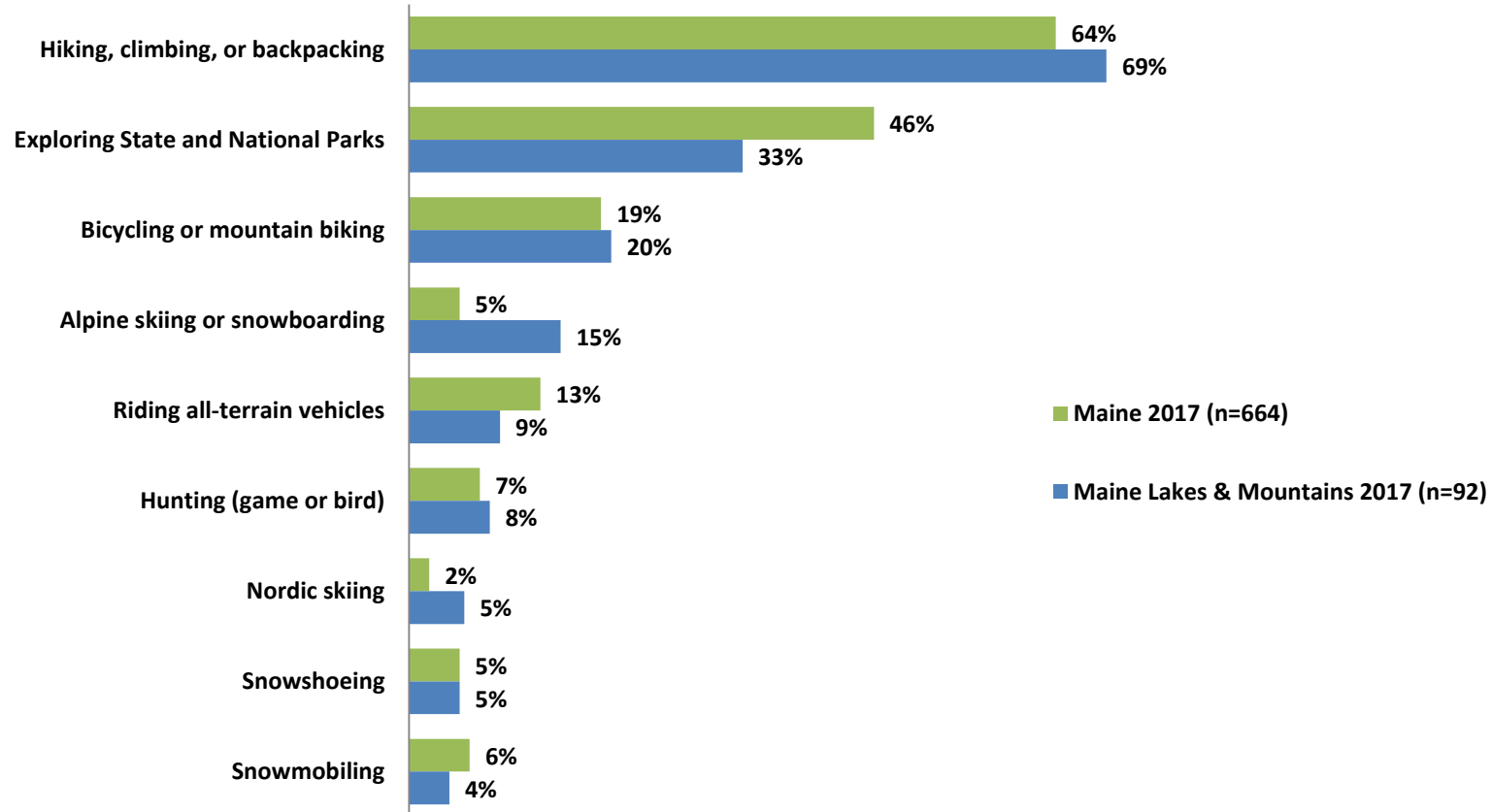
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

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

## Active Outdoor Activities – Non-Water

Base: Those who report non-aquatic 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 this region and the State at the 95% confidence level.

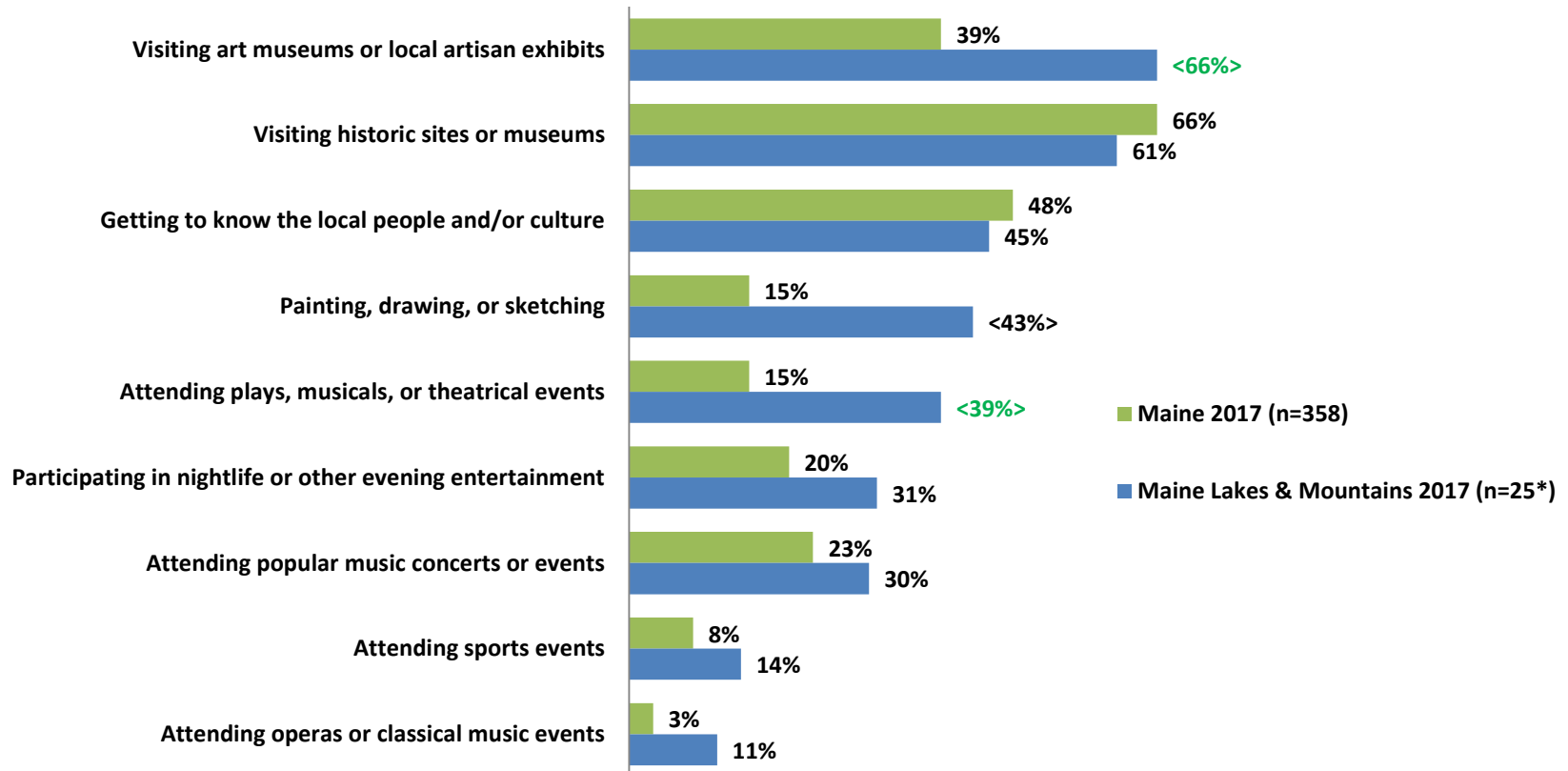
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Among day visitors to the region who are interested in history/culture, two-thirds *visit art museums or local artisan exhibits* during their trip.

- Day visitors to the Lakes & Mountains region are more likely than day visitors to the State as a whole to *visit art museums or local artisan exhibits, do some painting/drawing/sketching, or attend plays/musicals/theatrical events* while in the area.

## 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 this region and the State at the 95% confidence level.

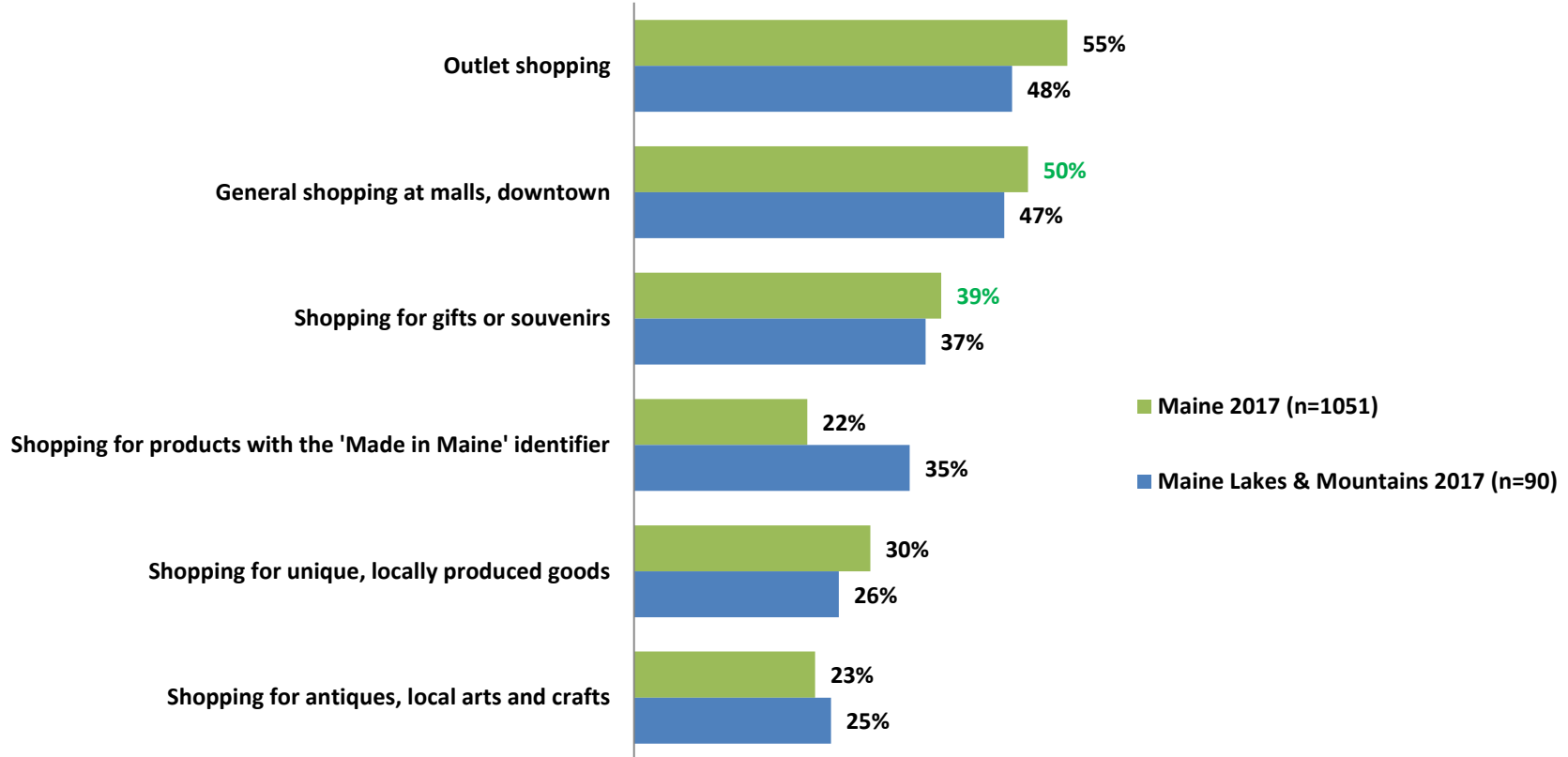
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

# Half of day visitors 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



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

<> indicates a significant difference between this region and the State at the 95% confidence level.

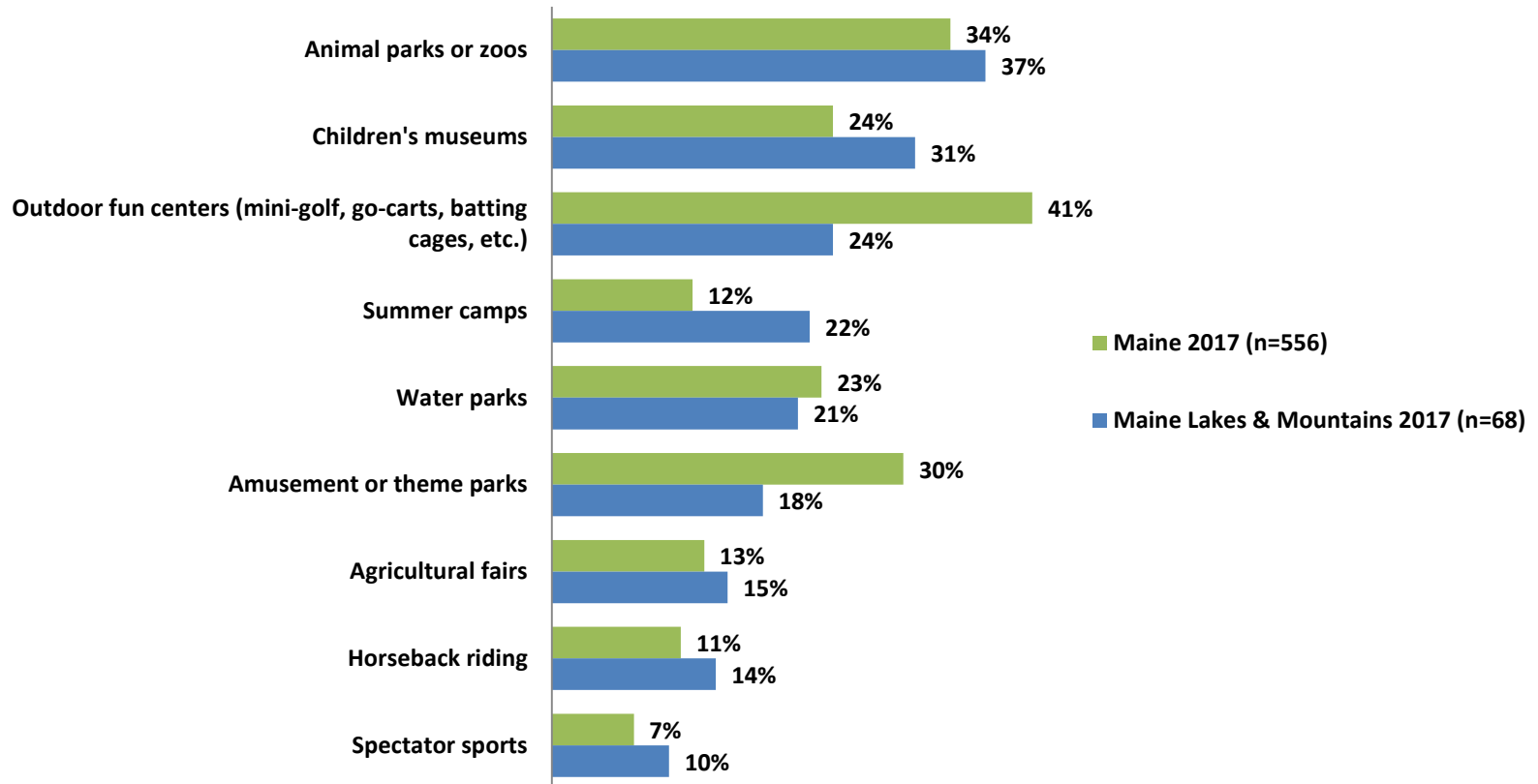
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# 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



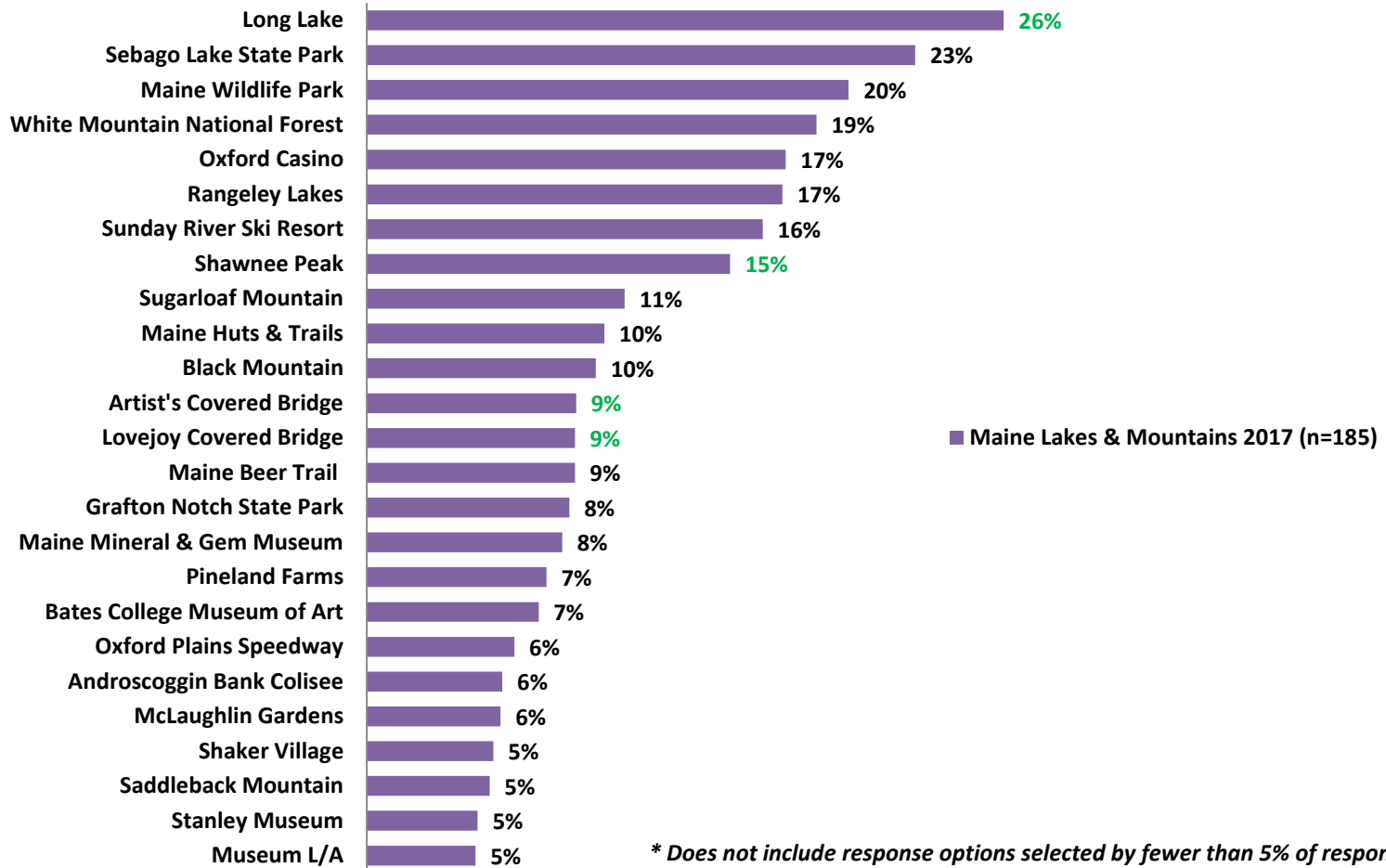
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State 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.

# Long Lake and Sebago Lake State Park are popular destinations for day visitors.

## 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)

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

# Comparison of Maine Lakes & Mountains Visitors to Maine Visitors

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# 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.

## 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 New Hampshire**

# Trip Interest Areas



# Trip Interests and Importance (Travel Driver Index)



## Trip Activities

### OVERNIGHT AND DAY VISITORS

**More likely to be:**

Enjoying the **mountain views**

**Canoeing/kayaking**

**Motor boating**

**Less likely to be:**

Enjoying the **ocean views/rocky coast**



# Trip Activities

## OVERNIGHT VISITORS

### More likely to be:

Viewing **wildlife/bird watching**

**Camping**

**Alpine skiing/snowboarding**

**Shopping for gifts/souvenirs**

**Visiting outdoor fun centers**

### Less likely to be:

Eating **lobster or other seafood**

Going to the **beach**

Exploring **State or National Parks**

## Trip Activities

### DAY VISITORS

**More likely to be:**

**Waterskiing/jet skiing**

**Visiting art museums**

**Painting/drawing/sketching**

**Attending plays/musicals**



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