

Maine Office of Tourism Visitor Tracking Research 2012 Calendar Year Annual Report

Regional Insights: Kennebec & Moose River Valley

Prepared by



April 2013

Introduction and Methodology



- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors. **The Maine Office of Tourism Visitor Research Program** is conducted online, with survey participants recruited from the *ResearchNow* national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - **Regional Travel Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders who have taken a day trip in Maine that is at least 50 miles from home within the past four weeks.
 - **National Omnibus Survey**
 - Includes a nationally balanced sample of US residents; and
 - Used to determine the incidence of travel nationwide and Maine’s share of that travel.

- This report outlines results from calendar year 2012, with travel occurring between January 2012 and December 2012.
- Data was collected between January 1st and December 15th 2012. The number of completed statewide surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,497
 - Maine Day Visitor – 1,520
 - National Omnibus Survey – 17,722

- The following report includes data on leisure visitors to the **Kennebec and Moose River Valley** tourism region, and is based on:
 - 63 overnight leisure visitors, and
 - 33 day leisure visitors.



Overnight Leisure Visitors: *Traveler Description*



Sample Size Caution:

Please note the small sample size of overnight leisure visitors to the Kennebec and Moose River Valley region (63). Data on the following pages should be used for directional purposes only.



Overnight Leisure Visitor Demographics

- Kennebec & Moose River Valley overnight leisure visitors trend closely to visitors to all of Maine and also to 2011 overnight leisure visitors. On average, these visitors are around 45 years of age with household incomes just over \$100,000. Most are college-educated.

Overnight, Leisure Visitors	Maine Leisure 2012 (n=1366)	Kennebec 2011 (n=72*)	Kennebec 2012 (n=63*)
Age:			
< 35	22%▼	19%	30%
35 - 44	17%	24%	20%
45 - 54	22%	30%	21%
55 +	39%▲	27%	30%
Mean Age (Years)	48.7	46.5	45.0
Income:			
< \$50,000	10%	9%	9%
\$50,000 - \$99,000	32%	36%	46%
\$100,000 +	43%	39%	38%
Mean Income (Thousands)	\$113.47	\$114.39	\$107.62
Female	49%▼	48%	55%
College Degree or Higher	79%▲	93%	81%
Married	63%	66%	52%
Employed Full Time	60%	64%	69%

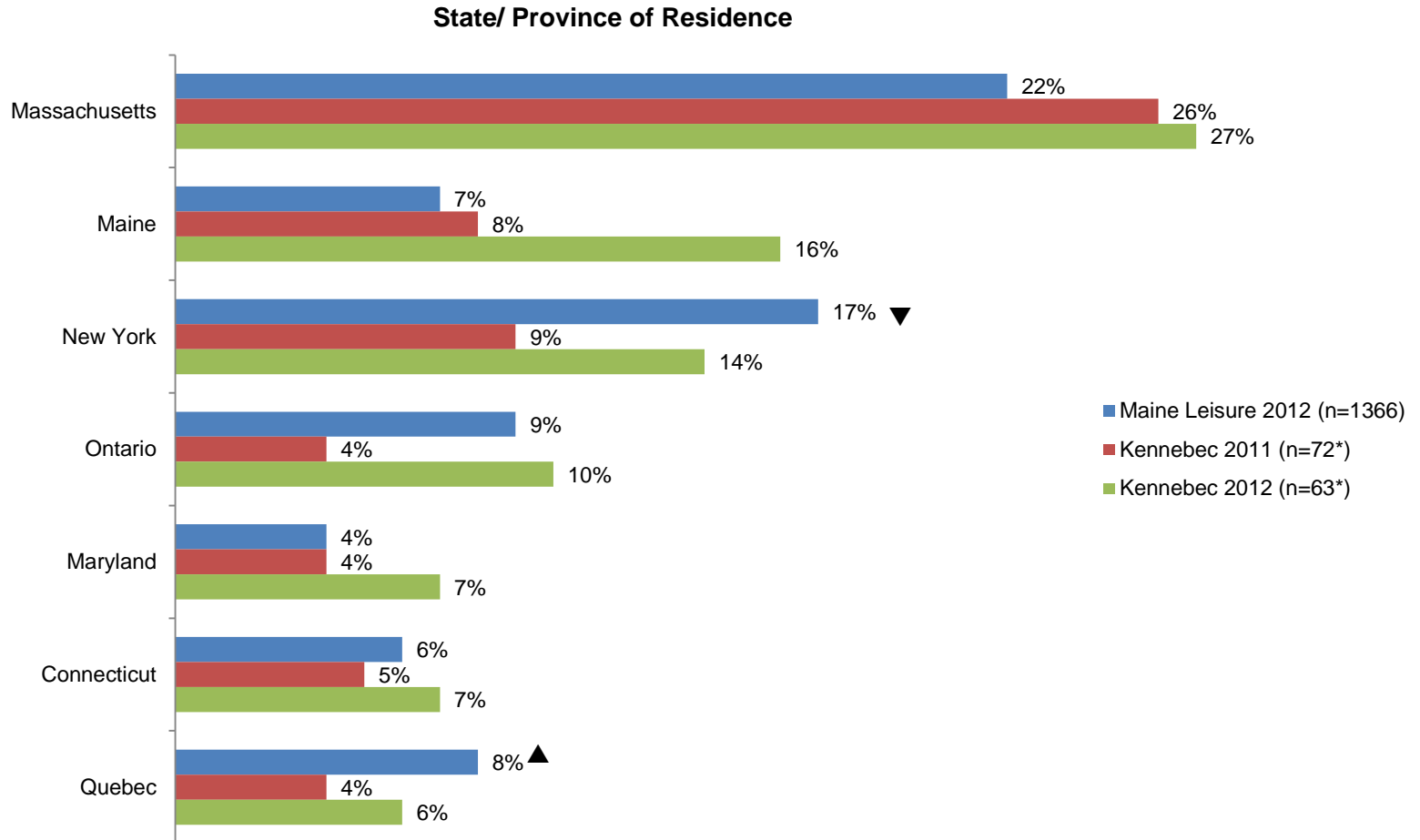
*Please note small sample size. Data should be used for directional purposes only.

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Overnight Leisure Visitor Residence

- Consistent with 2010 and 2011, the largest percentage of overnight leisure visitors to the Kennebec & Moose River Valley region are from Massachusetts. This is followed by Maine and New York.



State/Province of residence.

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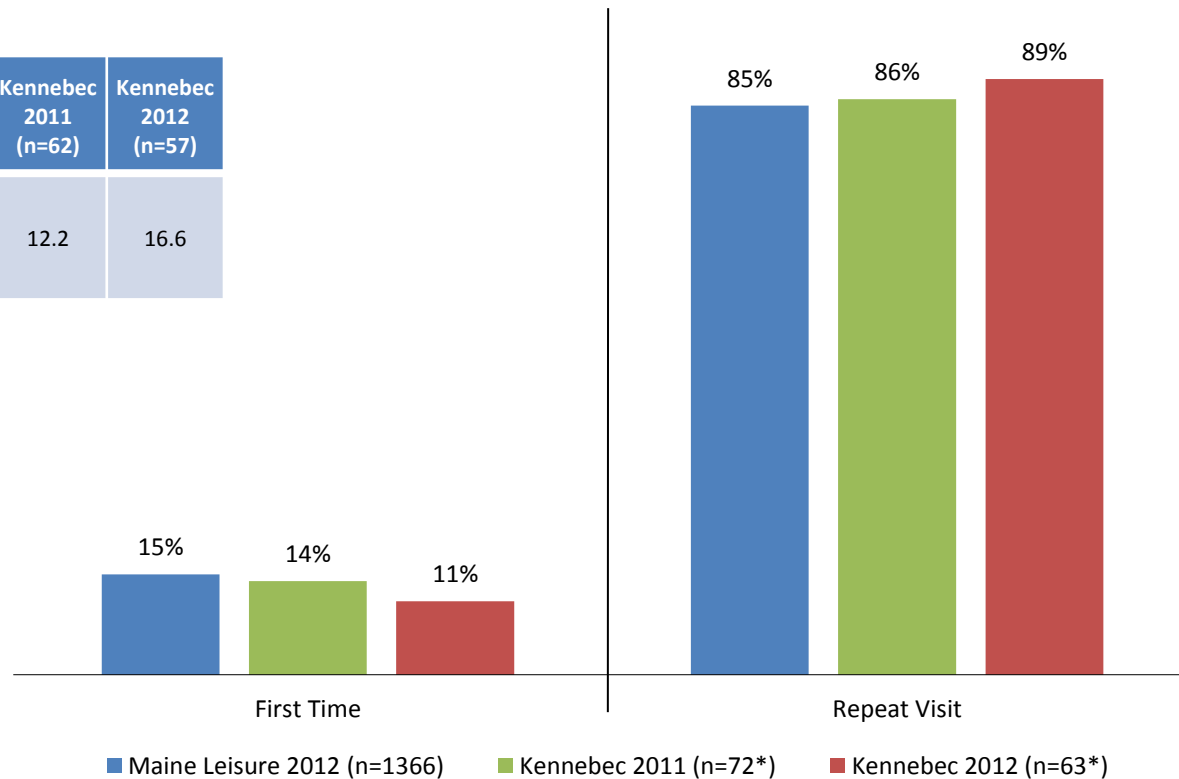
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First-Time vs. Repeat Visitors

- Consistent with overnight leisure visitors throughout the State of Maine, 11% of those visiting the Kennebec & Moose River Valley region are first-time visitors.

Repeat Overnight Leisure Visitors	Maine Leisure 2012 (n=1159)	Kennebec 2011 (n=62)	Kennebec 2012 (n=57)
Average number of trips to Maine in past 5 years	13.5	12.2	16.6



Regional Q9. Was this your first visit in Maine?

Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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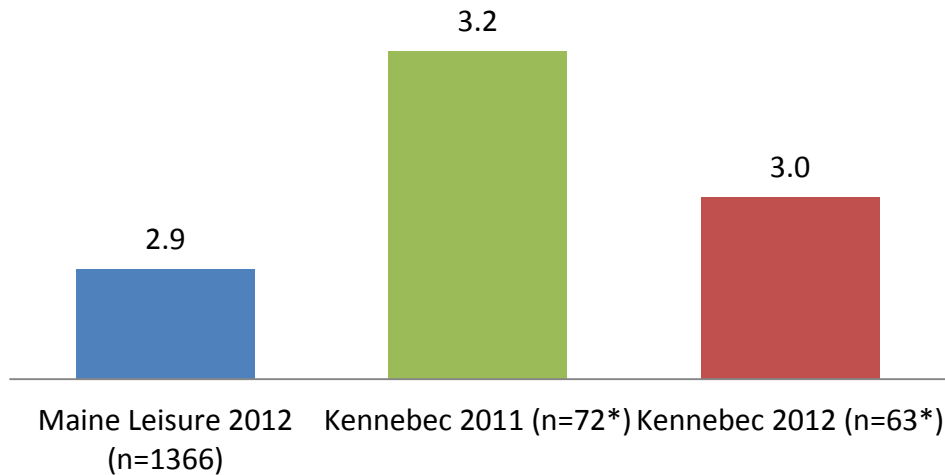
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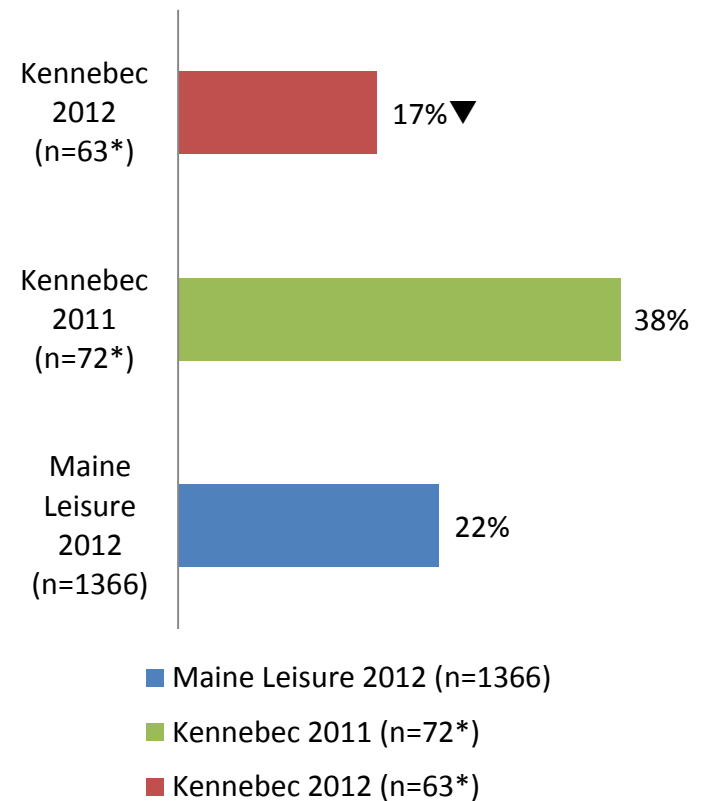
Party Size and Composition

- Just under one-fifth of the overnight leisure visitors to the Kennebec & Moose River Valley were traveling with children in 2012, a proportion consistent with visitors to the rest of Maine, but lower than the proportion of this region's visitors in 2011.

Average Number of People in Travel Party



Percent Traveling with Children



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

Regional Q25. How many of these people were: Children?

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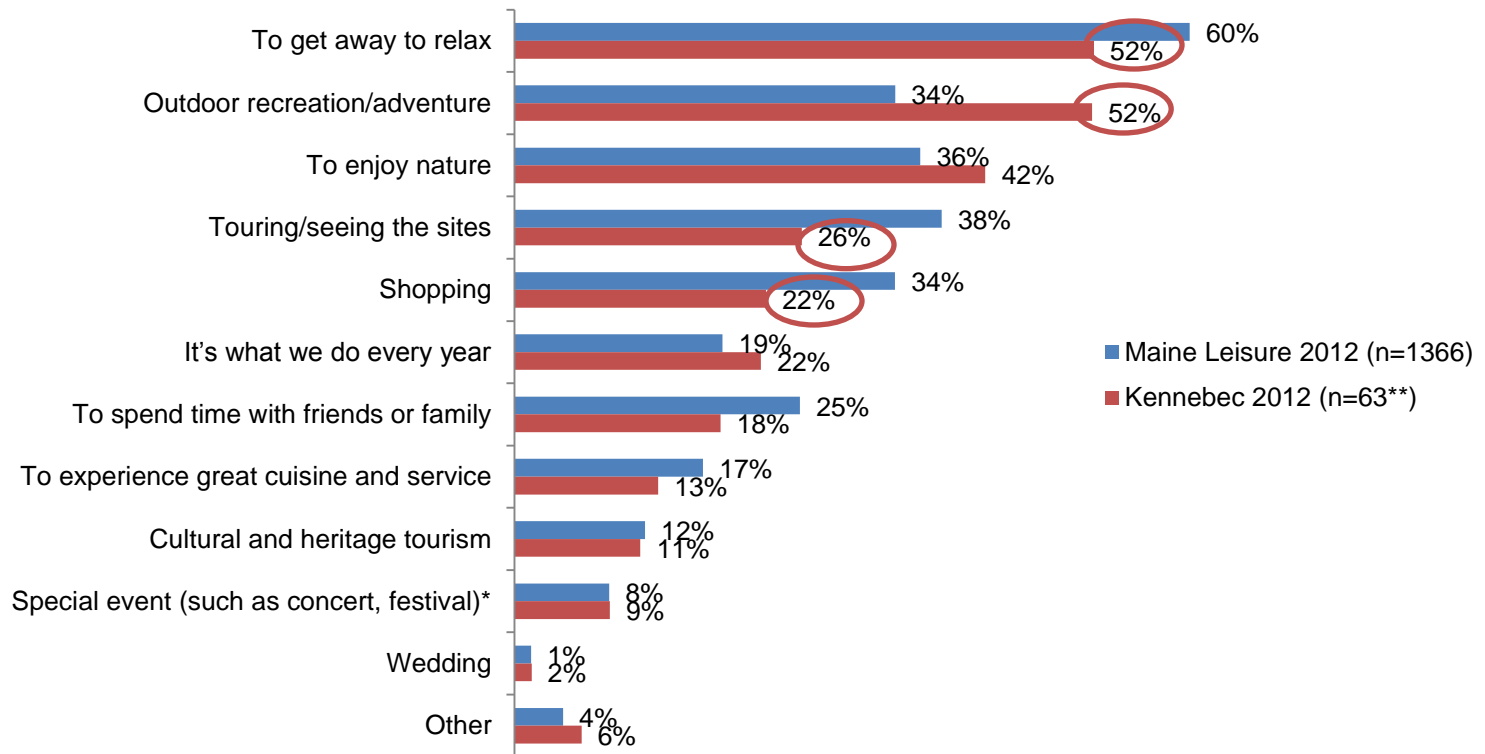
Overnight Leisure Visitors: *Trip Experience*



Primary Purpose of Overnight Leisure Trips

- Most visitors to the Kennebec & Moose River Valley region traveled *to get away to relax* or for *outdoor recreation*. Visitors to this region are more likely than visitors to the rest of Maine to be visiting for *outdoor recreation* and less likely to be visiting *to get away to relax, for touring/sightseeing, and for shopping*.

Primary Purpose of Overnight Leisure Trips



Regional Q7. What was the *primary* purpose of your most recent leisure trip in Maine?

* Includes wedding before 6/2012. Due to a revision to response options in 2012, direct comparisons between 2011 and 2012 data cannot be made.

**Please note small sample size. Data should be used for directional purposes only.

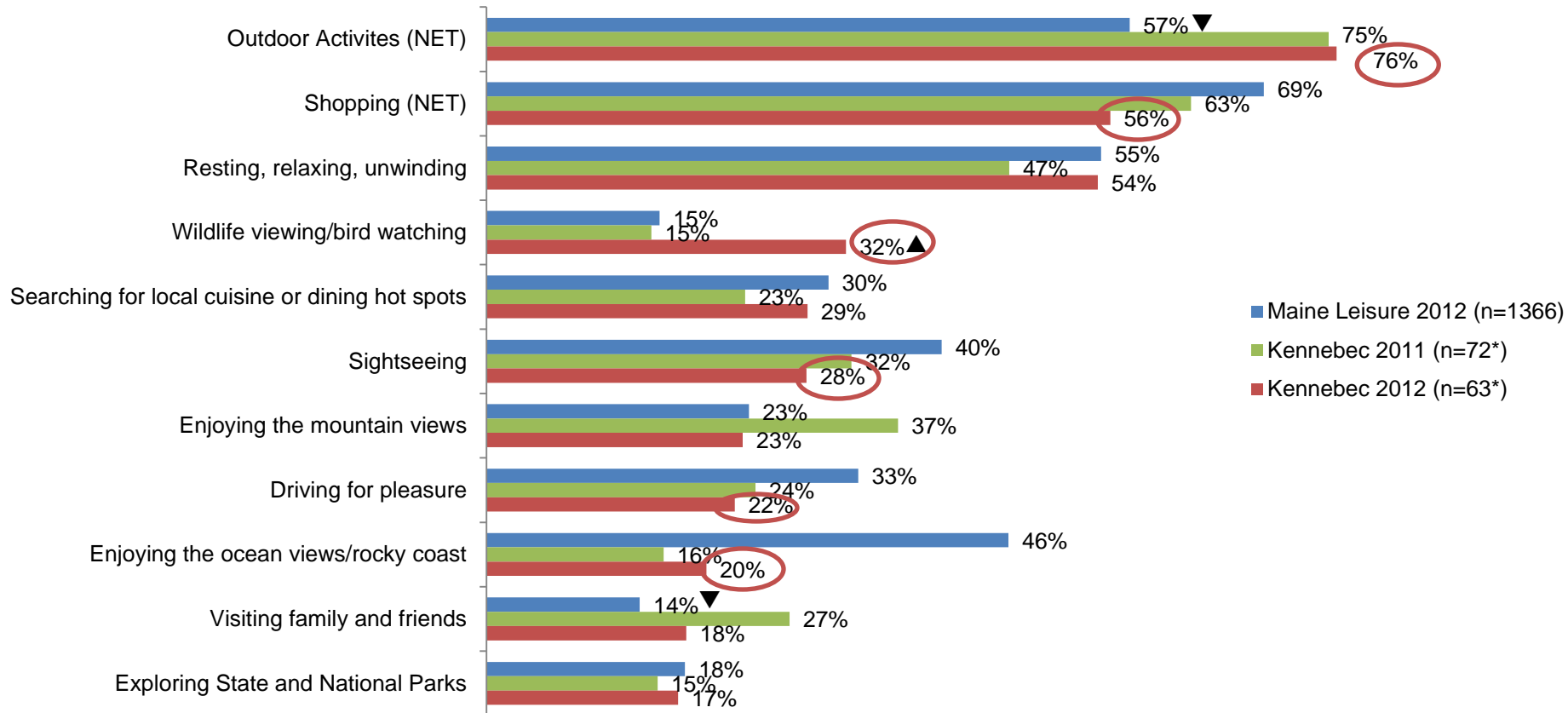
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Overnight Leisure Trip Activities

- Three-fourths of overnight leisure visitors to the Kennebec & Moose River Valley participated in various *outdoor activities* while visiting, a higher proportion than for the State of Maine as a whole. *Shopping* and *resting/relaxing/unwinding* were also popular activities for visitors to this region.

Top Trip Activities



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply)

*Please note small sample size. Data should be used for directional purposes only.

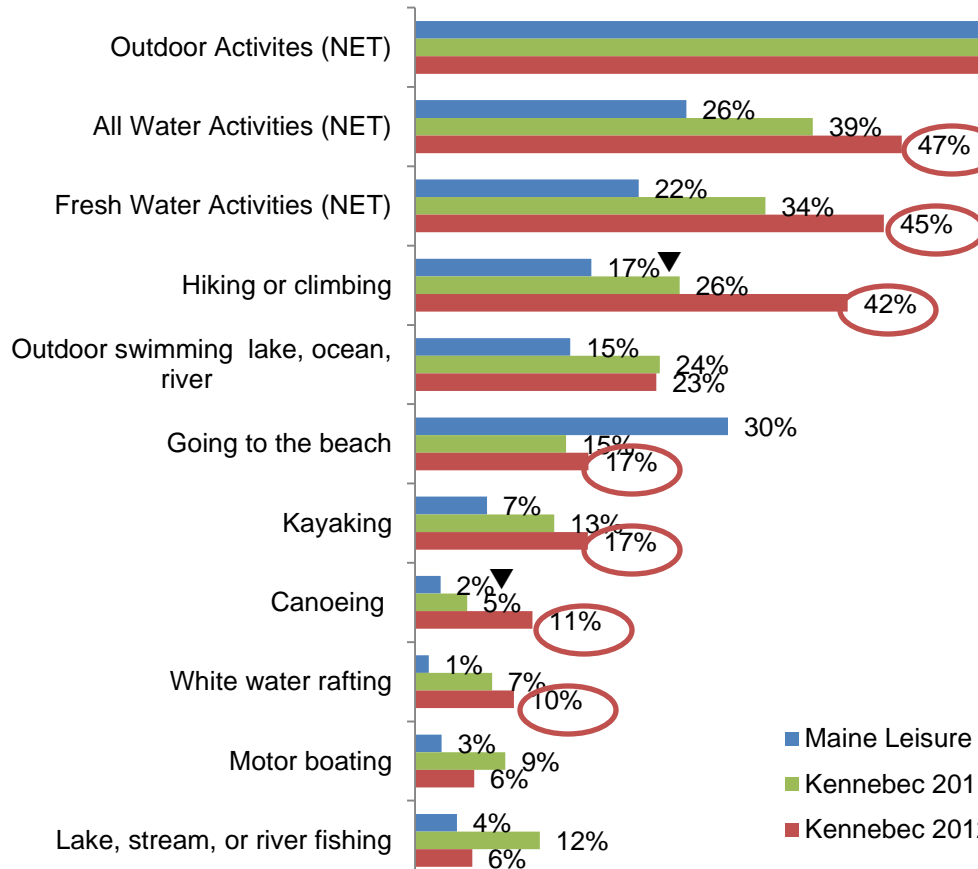
▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

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Overnight Leisure Outdoor Trip Activities

- Among leisure visitors to the Kennebec & Moose River Valley region, various *water activities* and *hiking/climbing* are the most popular outdoor activities. These activities are also more popular in this region than in the rest of the State. Shopping, on the other hand, is less popular among visitors to the Kennebec & Moose River Valley region.

Top Outdoor Activities



Shopping Activities	Maine Leisure 2012 (n=1366)	Kennebec 2011 (n=72*)	Kennebec 2012 (n=63*)
Shopping (NET)	69%	63%	56%
Shopping for gifts or souvenirs	33%	25%	39%
Outlet shopping	36%	31%	22%
General shopping at malls, downtown	31%	26%	21%
Shopping for antiques, local arts, crafts	20%	5%	10%

■ Maine Leisure 2012 (n=1366)
■ Kennebec 2011 (n=72)
■ Kennebec 2012 (n=63)

Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

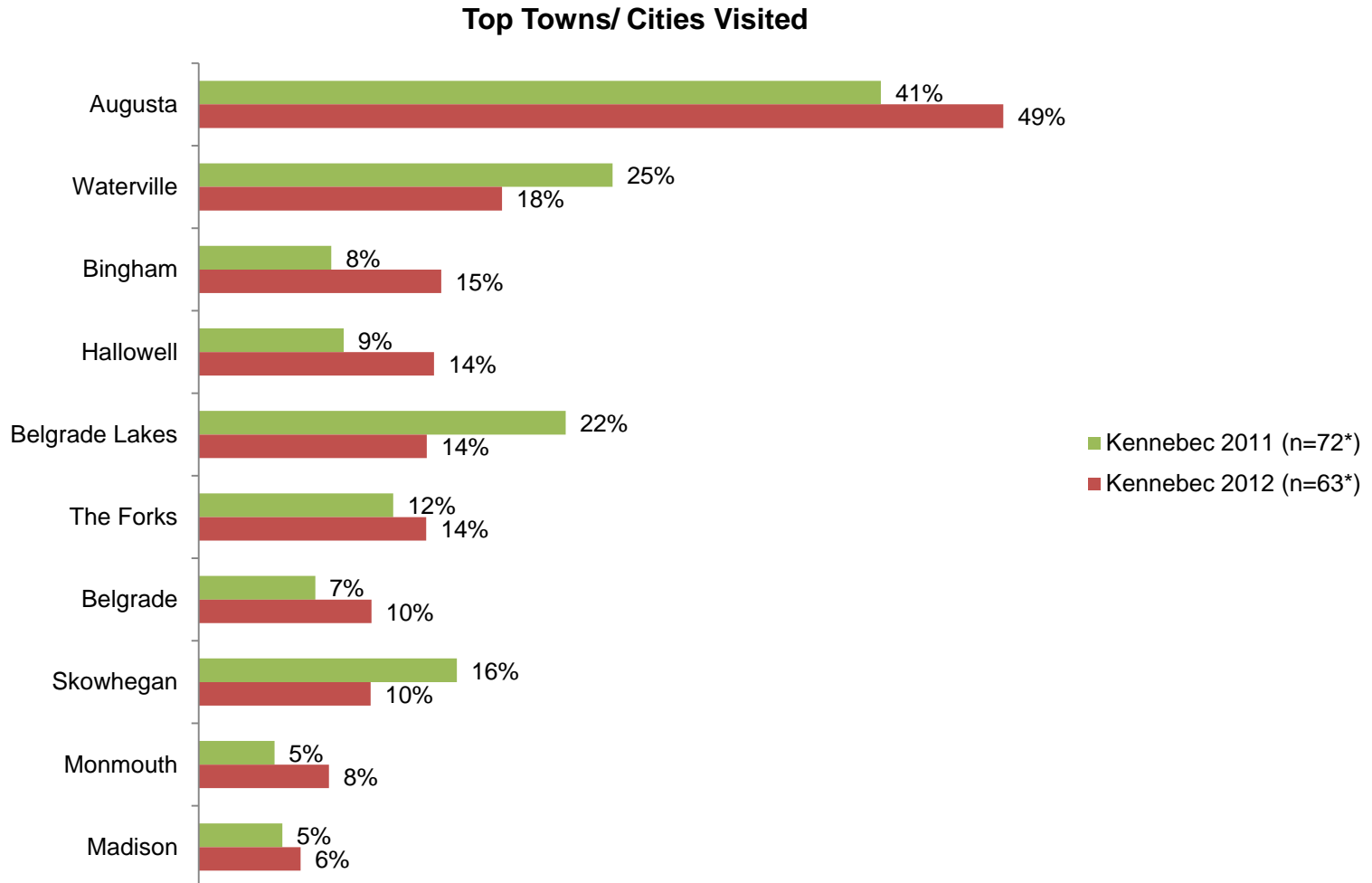
*Please note small sample size. Data should be used for directional purposes only.

▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

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Towns & Cities Visited

- Augusta was the most visited city in the Kennebec & Moose River Valley among overnight leisure visitors to the region in 2012, with half of this region's overnight visitors spending time there.



Regional Q31: Within the region you visited, what specific towns or cities did you visit?

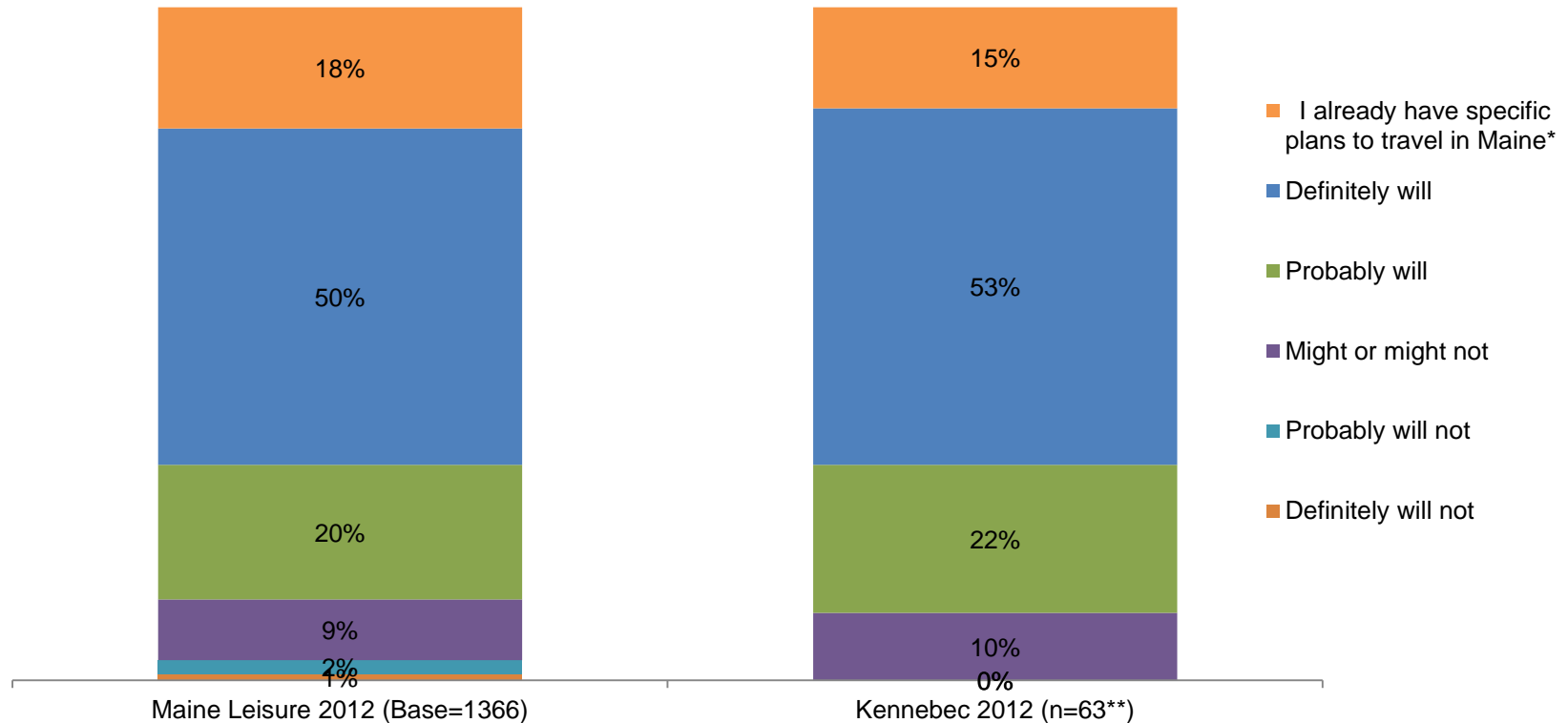
*Please note small sample size. Data should be used for directional purposes only.

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Future Travel Likelihood

- Two-thirds of overnight leisure visitors to the Kennebec & Moose River Valley in 2012 report that they will likely visit Maine again in the next two years, expressing that they either already have specific plans to do so or definitely will do so.



Regional Q37. How likely will you be to take a day trip in Maine in the next two years?

* Added in Summer 2012. Due to a revision to response options and question wording in 2012, direct comparisons between 2011 and 2012 data cannot be made.

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Day Leisure Visitors: *Traveler Description*



Sample Size Caution:

Please note the small sample size of day leisure visitors to the Kennebec and Moose River Valley region (33). Data on the following pages should be used for directional purposes only.



Day Leisure Visitor Demographics

- Day visitors to the Kennebec & Moose River Valley region average about 48 years old, with annual household incomes just under \$100,000. Two-thirds have a college degree and are employed full-time. On average, day visitors to this region are similar to day visitors to the State as a whole.

Day, Leisure Visitors	Maine Leisure 2012 (n=803)	Kennebec 2011 (n=53*)	Kennebec 2012 (n=33*)
Age:			
< 35	19%▼	31%	27%
35 - 44	17%	13%	13%
45 - 54	22%	20%	18%
55 +	41%	37%	43%
Mean Age (Years)	49.0▲	47.3	48.1
Income:			
< \$50,000	15%	16%	15%
\$50,000 - \$99,000	44%	51%	52%
\$100,000 +	40%	32%	33%
Mean Income (Thousands)	\$101.11▲	\$84.63	\$96.69
Female	47%	61%	65%
College Degree or Higher	72%	62%	63%
Married	64%	57%	67%
Employed Full Time	60%	58%	69%

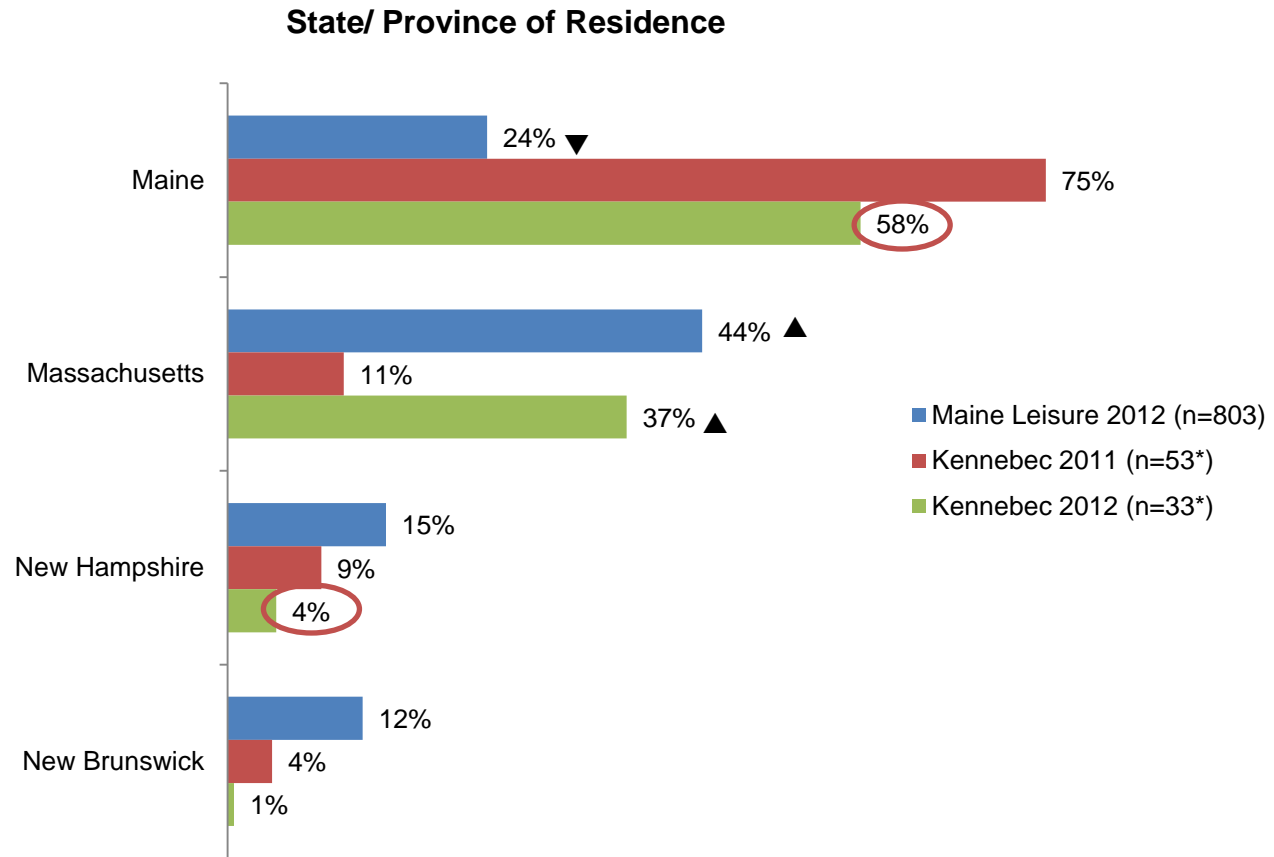
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Day Leisure Visitor Residence

- More than half of leisure day visitors to the Kennebec & Moose River Valley region were from Maine, a result consistent with 2010 and 2011 levels. Aside from the relatively large percentage of Maine residents, this region also attracts a high proportion of leisure day visitors from Massachusetts.
- As compared to the rest of Maine, this region appears to attract a higher proportion of in-state day visitors and a lower proportion of day visitors from New Hampshire.



Day Q1A. In what State or Province do you reside?

*Please note small sample size. Data should be used for directional purposes only.

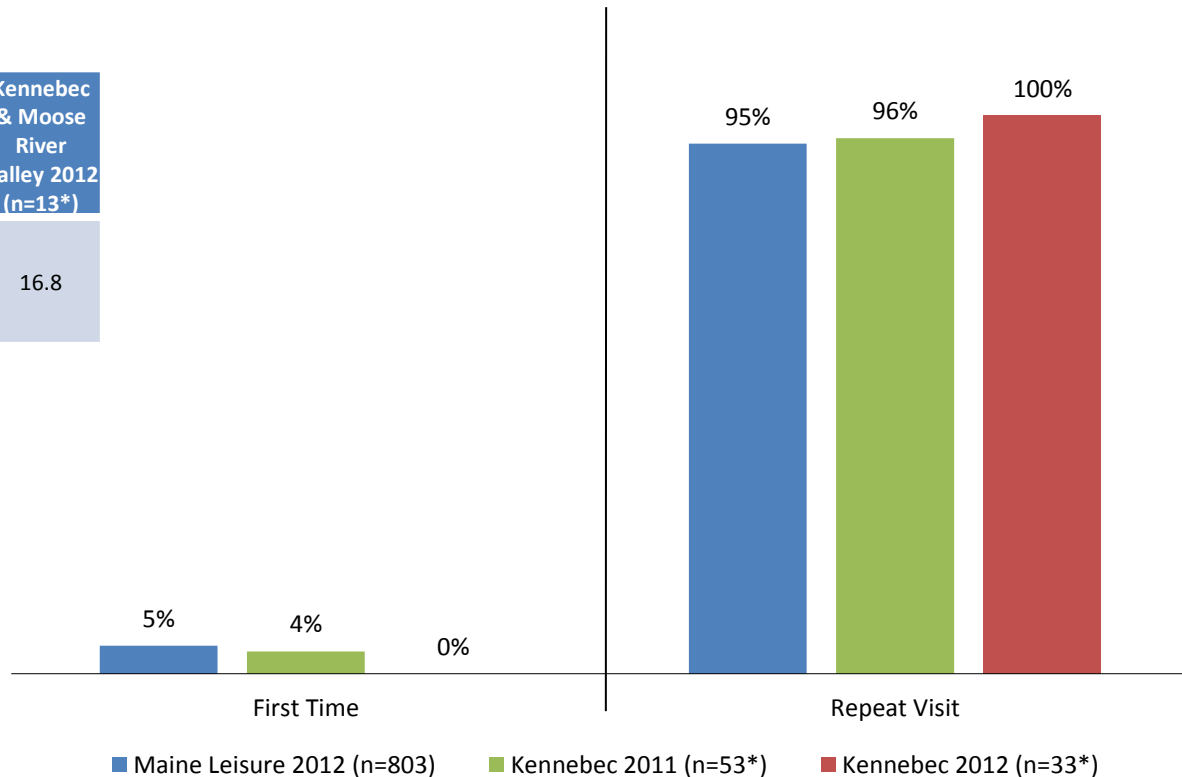
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First-Time vs. Repeat Visitors

- All day visitors surveyed who visited the Kennebec & Moose River Valley in 2012 were repeat visitors to Maine.

Repeat Leisure Day Visitors	Maine Leisure 2012 (n=510)	Kennebec & Moose River Valley 2012 (n=13*)
Average number of trips to Maine in past 5 years	22.5	16.8



Day Q4. Was this your first trip to Maine?

Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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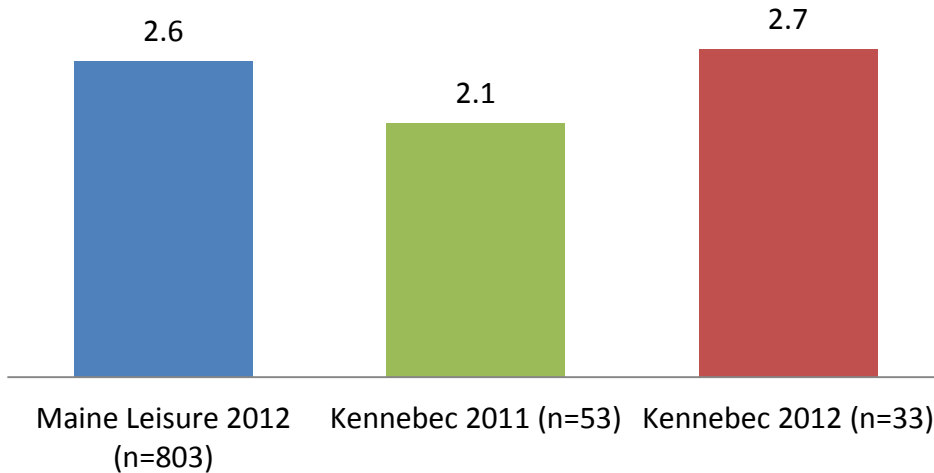
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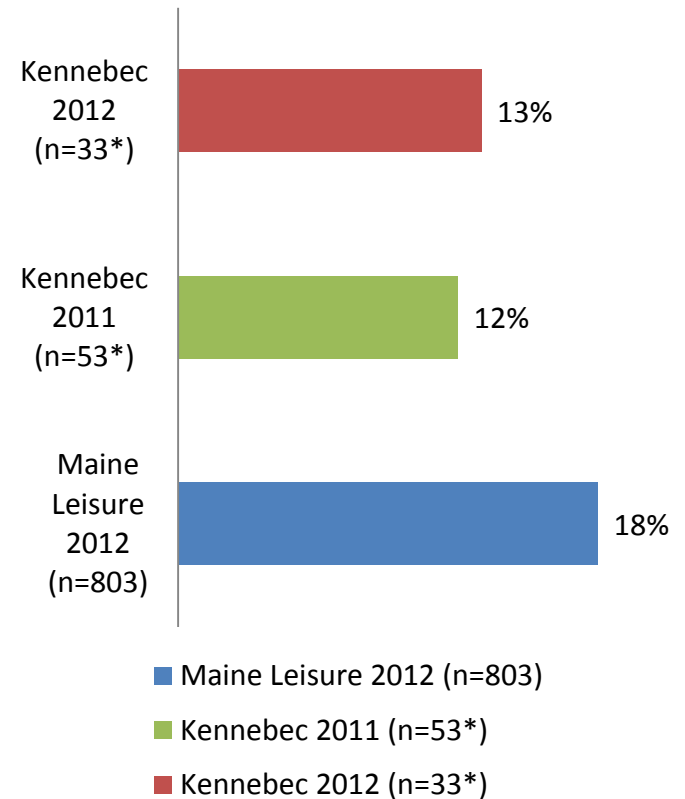
Party Size and Composition

- Thirteen percent of day leisure visitors to the Kennebec & Moose River Valley were traveling with children in 2012, consistent with day leisure visitors to the rest of the State.

Average Number of People in Travel Party



Percent Traveling with Children



Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q8. How many of these people were: Children

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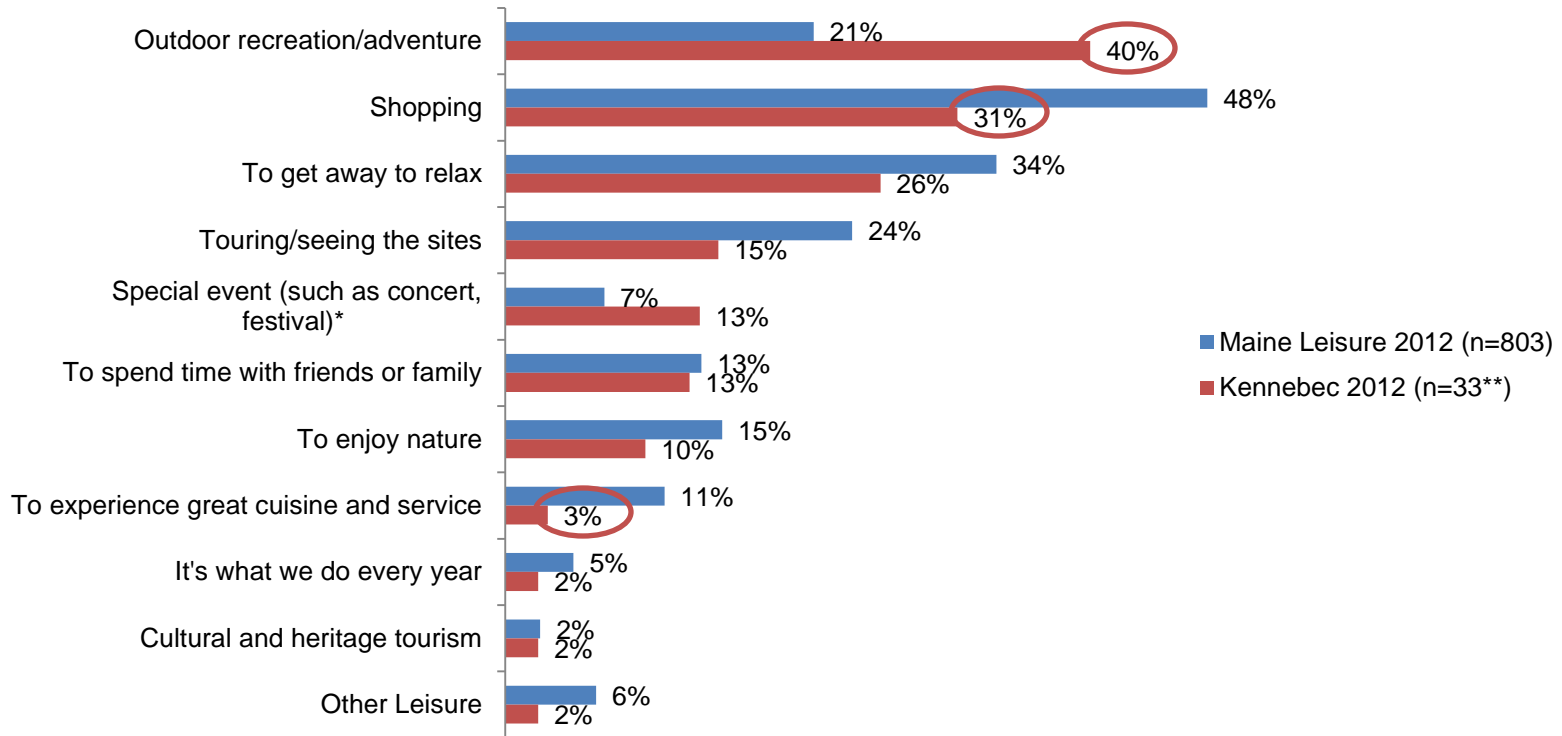
Day Leisure Visitors: *Trip Experience*



Primary Purpose of Day Leisure Trips

- As was the case with overnight leisure visitation to the Kennebec & Moose River Valley region, outdoor recreation was a key primary trip purpose for this region, even more so than it is for other parts of the State. Though still key for this region, shopping was less often cited as a primary trip purpose than for the rest of the State.

Primary Purpose of Day Leisure Trips



Day Q3. What was the primary purpose of your most recent leisure trip in Maine?

* Includes wedding before 6/2012. Due to a revision to response options in 2012, direct comparisons between 2011 and 2012 data cannot be made.

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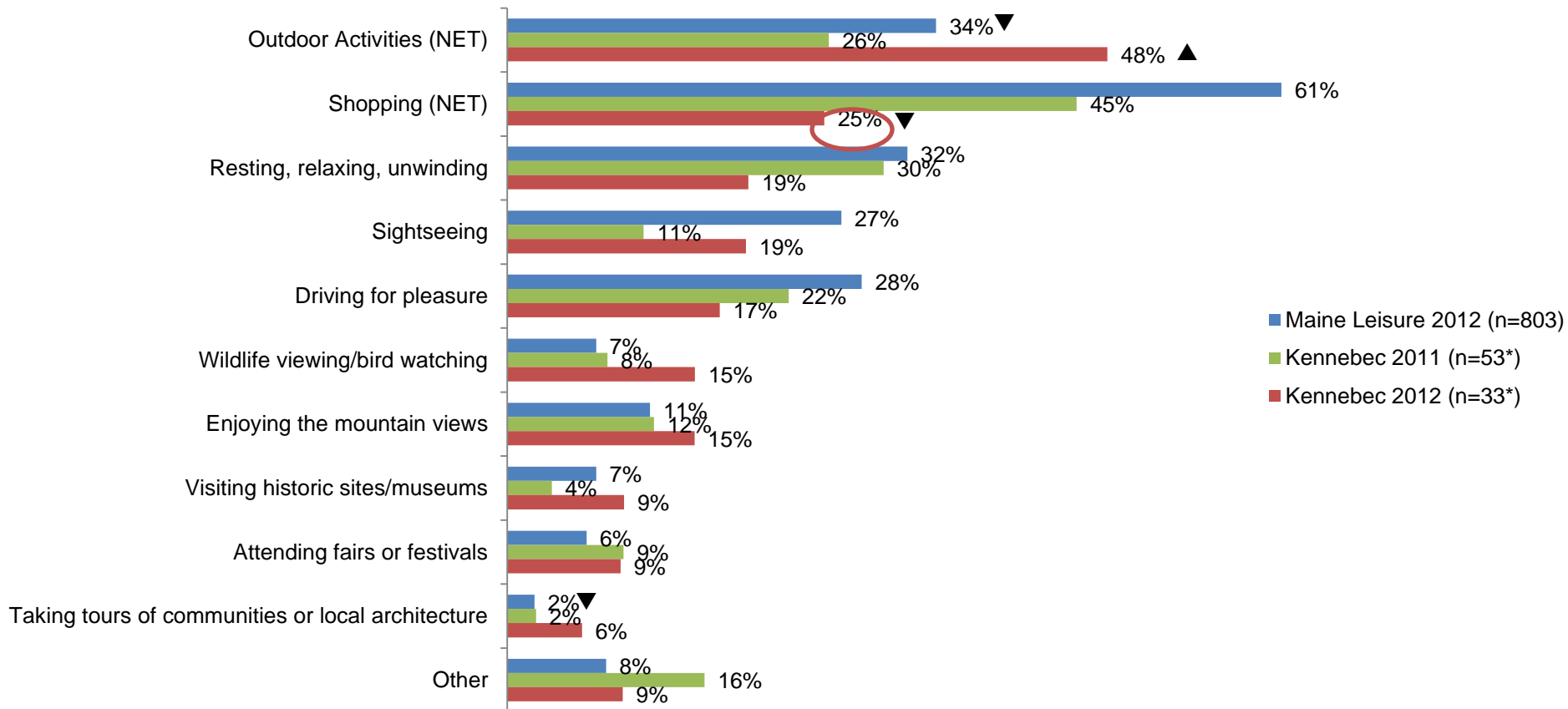
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Day Leisure Trip Activities

- Outdoor recreation activities were the most widely cited activity conducted by leisure day visitors to the Kennebec & Moose River Valley region, followed by shopping. Though the sample sizes are small for both years, it appears that directionally the proportion participating in various outdoor activities increased between 2011 and 2012, while the proportion shopping decreased.

Top Trip Activities



Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).

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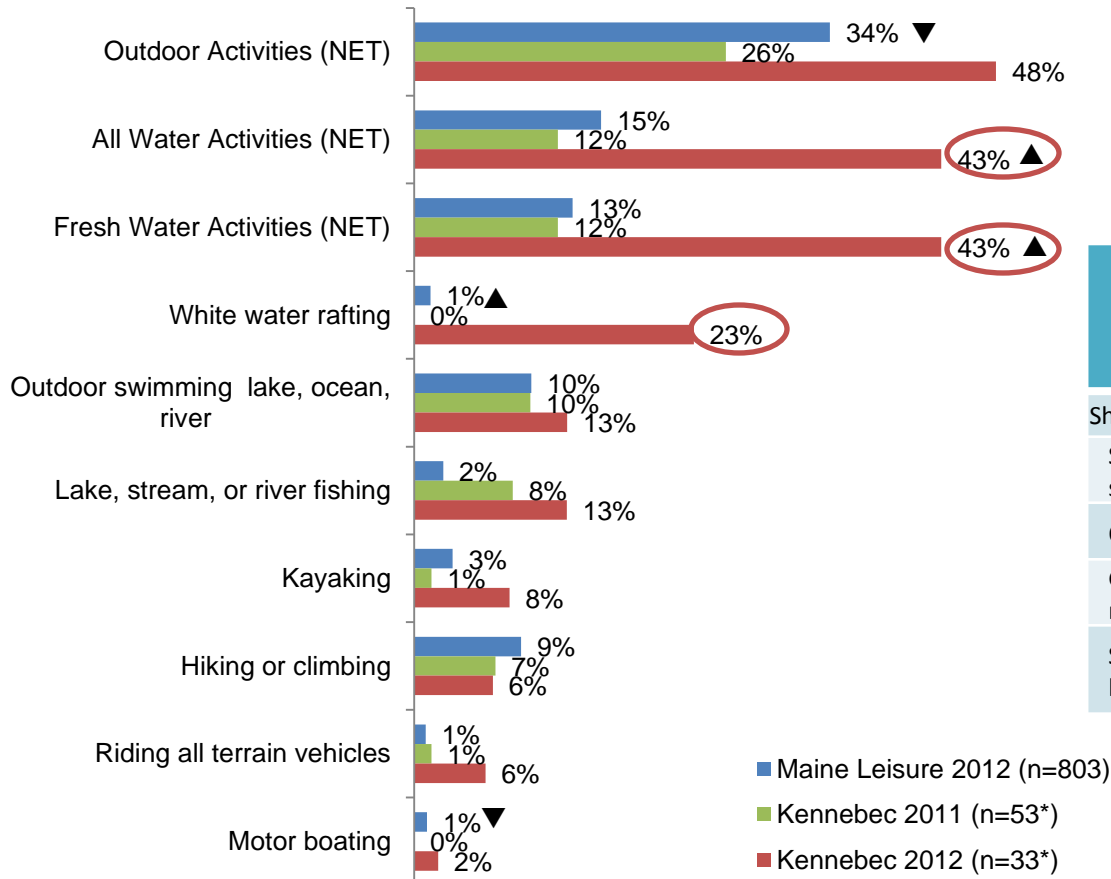
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Day Leisure Outdoor Trip Activities

- Various water activities are the main outdoor recreation experienced by day visitors to the Kennebec & Moose River Valley in 2012, showing an increase over 2011.

Top Outdoor Activities



Shopping Activities	Maine Leisure 2012 (n=803)	Kennebec 2011 (n=53*)	Kennebec 2012 (n=33*)
Shopping (NET)	61%	45%	25%
Shopping for gifts or souvenirs	18%	8%	0%
Outlet shopping	32%	20%	4%
General shopping at malls, downtown	26%	34%	17% ▼
Shopping for antiques, local arts, crafts	15%	12%	7%

Day Q10. In which of the following activities did you participate during your most recent trip in Maine? (Please check all that apply).

*Please note small sample size. Data should be used for directional purposes only.

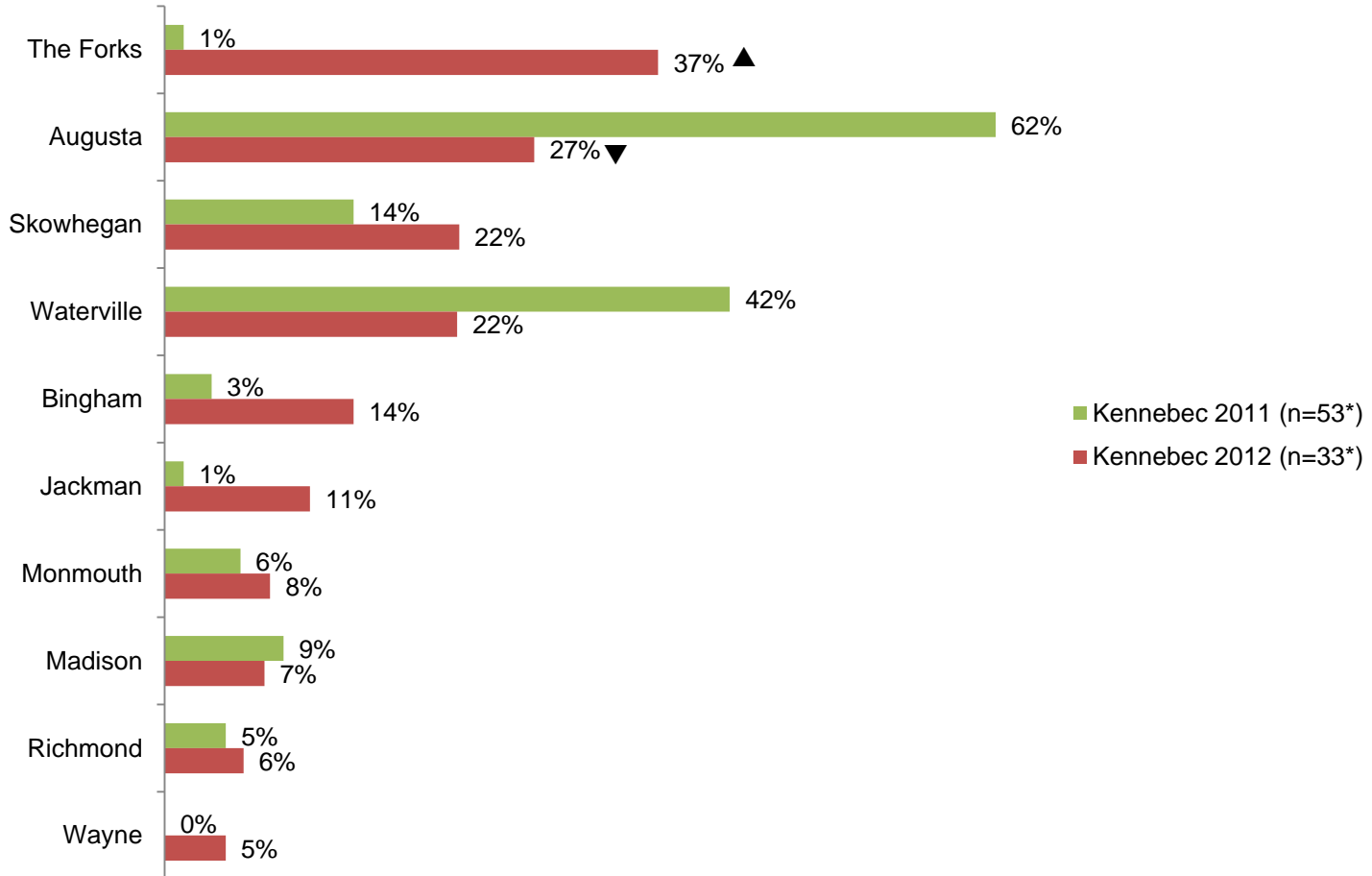
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Towns & Cities Visited

- Among day visitors to the Kennebec & Moose River Valley region, The Forks was the most widely visited, followed by Augusta, Skowhegan, and Waterville.

Top Towns/Cities Visited



Day Q12: Within the region you visited, what specific towns or cities did you visit?

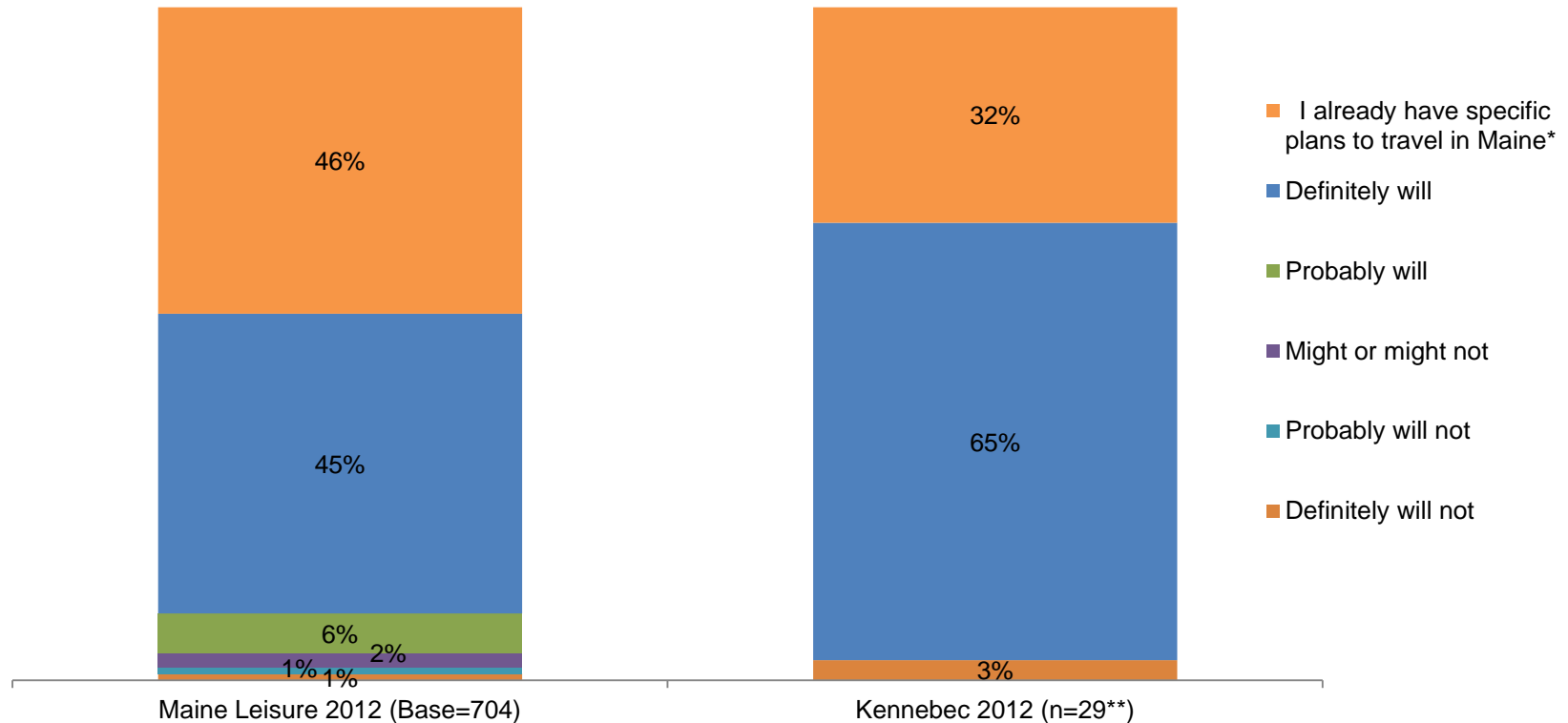
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Future Travel Likelihood

- Nearly all day leisure visitors to the Kennebec & Moose River Valley region indicate that they will be back to visit Maine in the next two years. Ninety-seven percent say that they will definitely return or that they already have specific plans to do so.



Day Q19. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

*Added in Summer 2012. Due to a revision to response options and question wording in 2012, direct comparisons between 2011 and 2012 data cannot be made.

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Comparison of *Kennebec & Moose River Valley* Visitors to Maine Visitors



Comparisons

- Visitors to the Kennebec & Moose River Valley region and visitors to the State of Maine as a whole differ in a few areas. These variations can be seen primarily in visitors' reasons for traveling and the activities they participate in while visiting.
- Popular trip activities and stated purpose of trips closely follow the outdoor and nature-oriented environment available in the Kennebec & Moose River Valley.
- Highlights:
 - **Visitor Origin**
 - A **greater proportion** of day visitors from **Maine**.
 - A **lesser proportion** of day visitors from **New Hampshire**.
 - **Primary Purpose of Trip**
 - Overnight and day visitors **more** likely to be traveling for **outdoor recreation**.
 - Overnight visitors **less** likely to be visiting to:
 - Shop (**day visitors also**)
 - Get away to relax
 - Tour/see the sites

Comparisons Continued

- Highlights Continued:
 - **Trip Activities – Overnight Visitors**
 - **More likely to be:**
 - Outdoor recreation
 - Wildlife viewing/bird watching
 - **Less likely to be:**
 - Shopping (**day visitors also**)
 - Sightseeing
 - Enjoying the ocean views
 - Driving for pleasure
 - **Outdoor Activities – Overnight and Day Visitors**
 - **More likely to be:**
 - Water activities
 - Fresh water activities
 - White water rafting
 - **Overnight visitors** are also **more likely to be:**
 - Kayaking
 - Canoeing
 - Hiking/climbing



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