

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

## *Regional Insights: Maine Lakes and Mountains*

*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 1<sup>st</sup> and December 15<sup>th</sup> 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 **Maine Lakes and Mountains** tourism region, and is based on:
  - 101 overnight leisure visitors, and
  - 50 day leisure visitors.



# Overnight Leisure Visitors: *Traveler Description*



# Overnight Leisure Visitor Demographics

- The Lakes and Mountains region continues to attract visitors who are slightly younger than the state average.

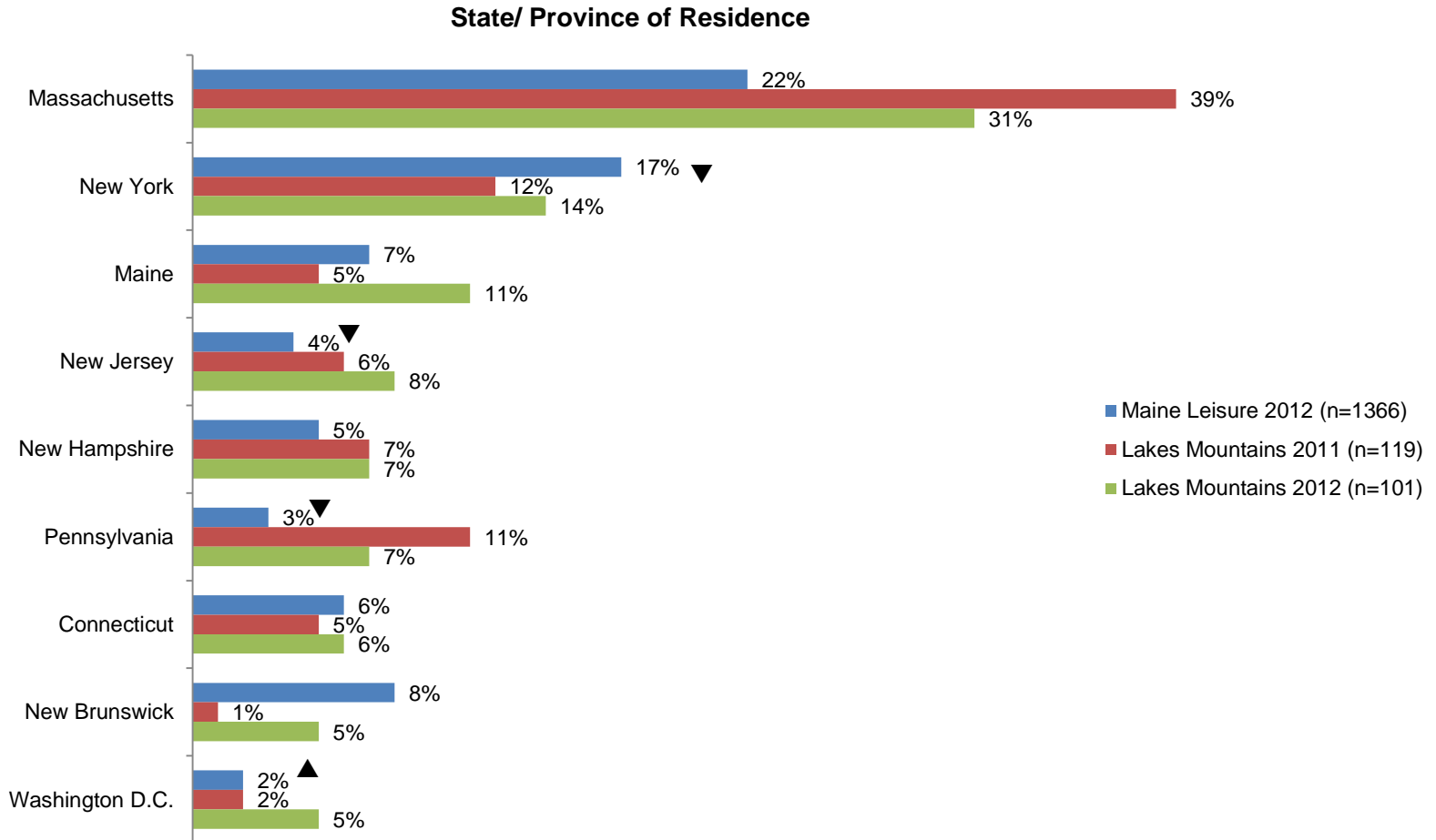
Overnight, Leisure Visitors	Maine Leisure 2012 (n=1366)	Lakes & Mountains 2011 (n=119)	Lakes & Mountains 2012 (n=101)
Age:			
< 35	22%▼	44%	36%
35 - 44	17%	15%	16%
45 - 54	22%	19%	18%
55 +	39%▲	21%	30%
Mean Age (Years)	48.7	40.4	43.9
Income:			
< \$50,000	10%	11%	13%
\$50,000 - \$99,000	32%	35%	35%
\$100,000 +	43%	37%	36%
Mean Income (Thousands)	\$113.47	\$105.23	\$110.57
Female	49%▼	59%	50%
College Degree or Higher	79%▲	69%	76%
Married	63%	61%	68%
Employed Full Time	60%	66%	65%

▲▼ 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

- In 2012, one-third of overnight leisure visitors to the Lakes & Mountains region were from Massachusetts, similar to 2011. New York and Maine comprised the next highest proportion of overnight leisure visitors. There were no significant year-over-year shifts seen in the origin of overnight visitors to this region.



State/Province of residence.

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

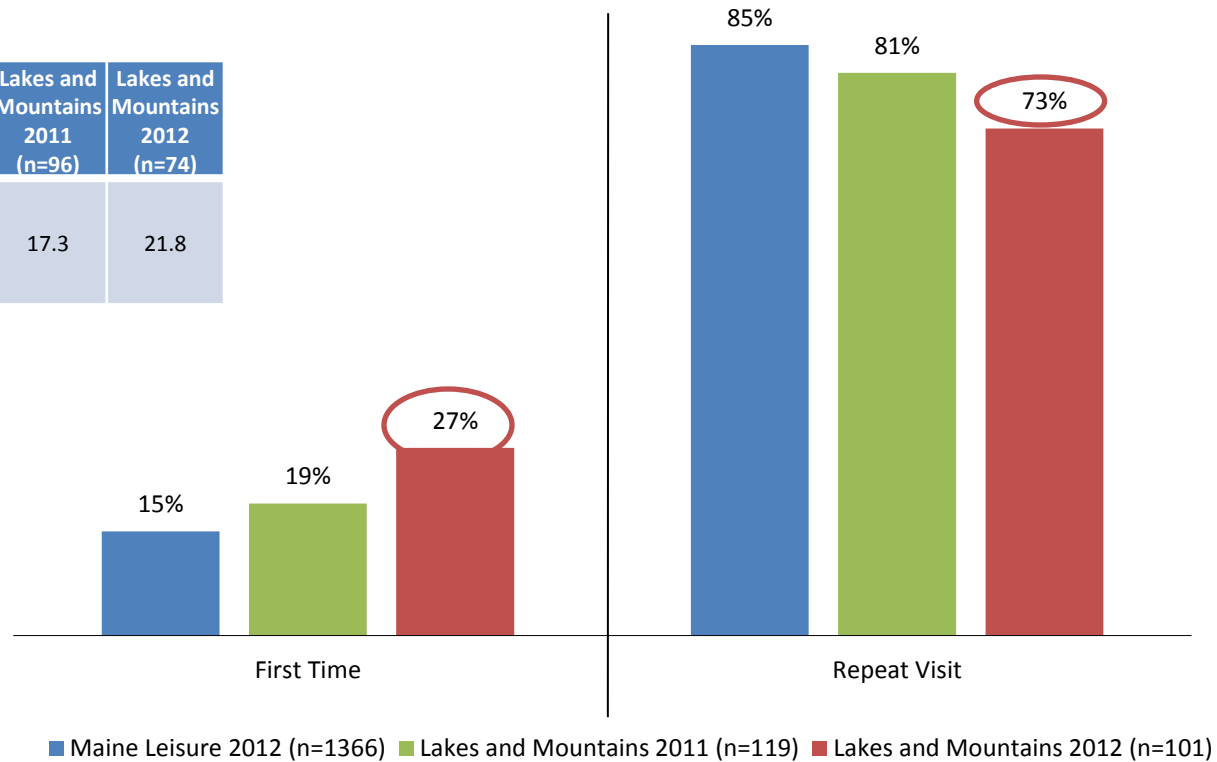
Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.



# First-Time vs. Repeat Visitors

- One in four overnight leisure visitors to the Lakes and Mountains region in 2012 were first-time visitors, a significantly greater proportion than for the State of Maine as a whole.

Repeat Overnight Leisure Visitors	Maine Leisure 2012 (n=1159)	Lakes and Mountains 2011 (n=96)	Lakes and Mountains 2012 (n=74)
Average number of trips to Maine in past 5 years	13.5	17.3	21.8



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?

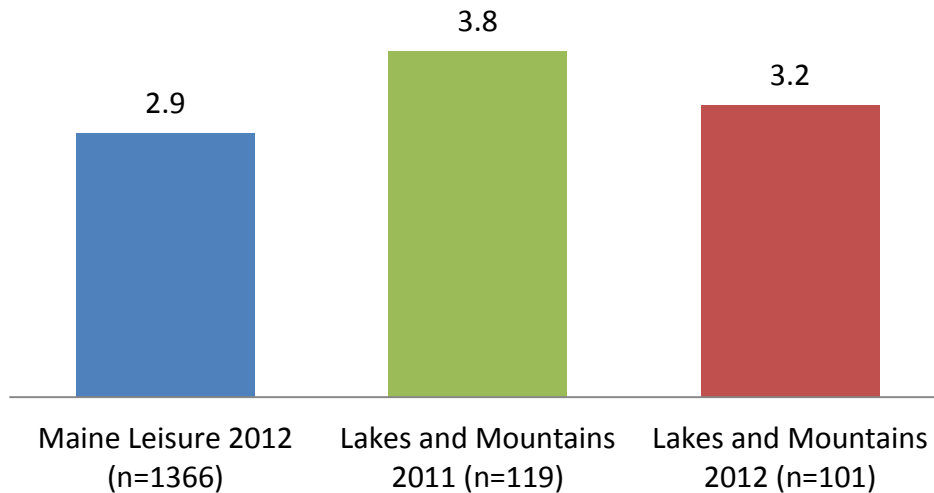
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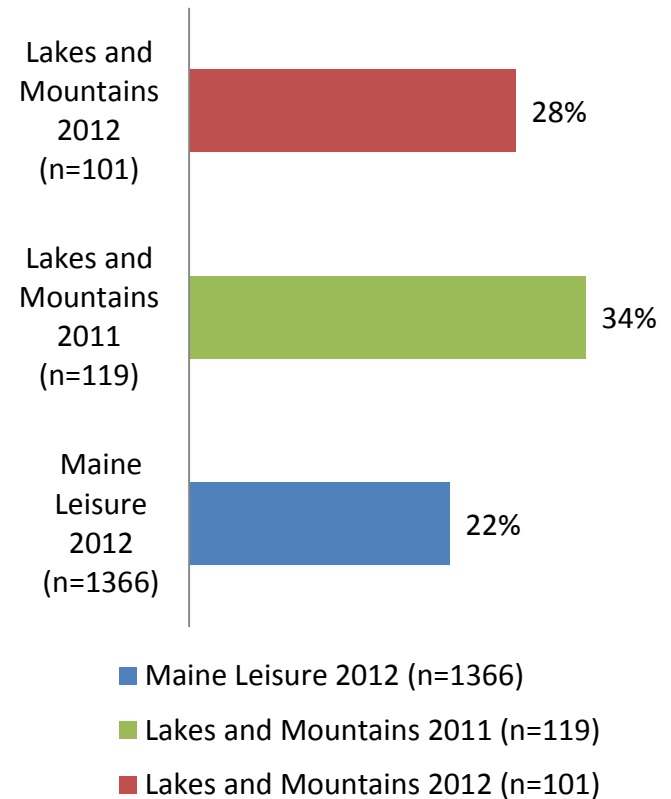
# Party Size and Composition

- One-fourth of overnight leisure visitors to the Lakes and Mountains region were traveling with children, similar to those visiting the rest of Maine.

**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?

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

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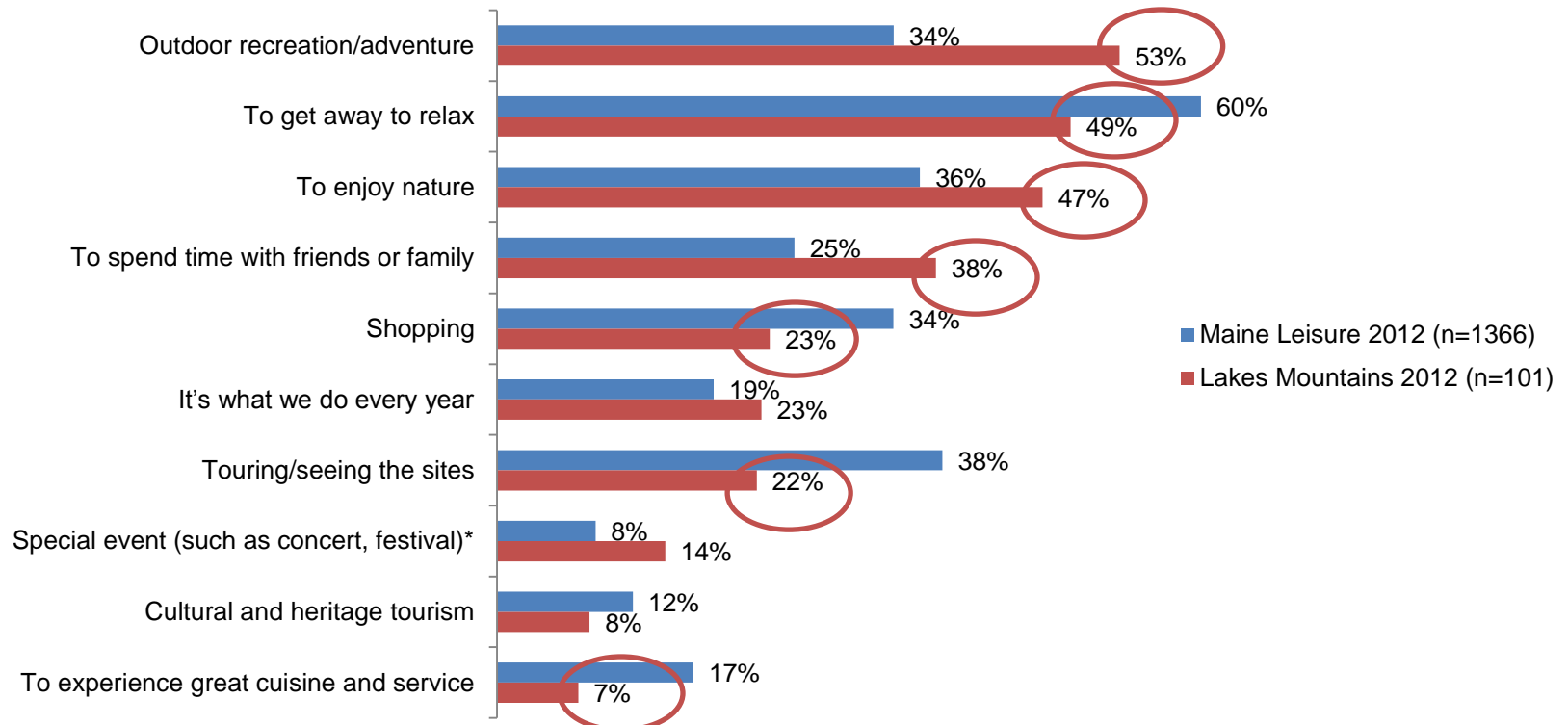
# Overnight Leisure Visitors: *Trip Experience*



# Primary Purpose of Overnight Leisure Trips

- Half of overnight leisure visitors to the Lakes & Mountains region reported that *outdoor recreation, getting away to relax, or enjoying nature* were the primary purposes of their visit. Overall, the stated purpose of these trips to the Lakes and Mountains region differs quite markedly from the state averages. Reflecting the variety of outdoor activities available in this region, these visitors are more likely to be visiting for *outdoor recreation, to enjoy nature, and to spend time with family/friends*. They are less likely to be visiting for *shopping, touring, or to get away to relax*.

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.

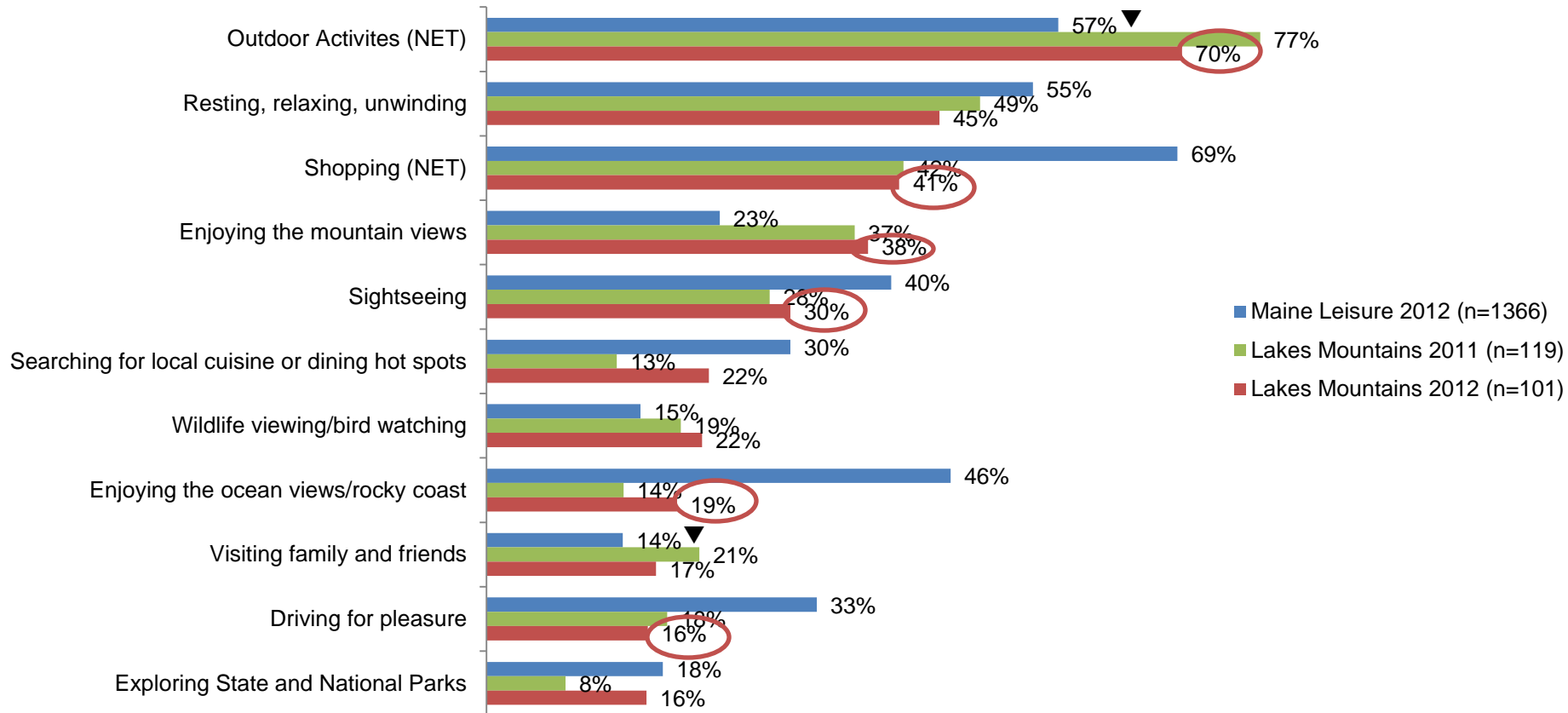
▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

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

# Overnight Leisure Trip Activities

- Nearly three-fourths of overnight leisure visitors to the Lakes and Mountains region participated in various *outdoor activities*. There were no significant shifts seen between 2011 and 2012 trip activities. Similar to visitors' primary purpose of their trip, visitors to this region of Maine spent their time differently than visitors to the rest of the State. *Outdoor activities* and *enjoying mountain views* were more popular in this region, while *shopping, sightseeing, and enjoying the ocean views* were less popular.

**Top Trip Activities**



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

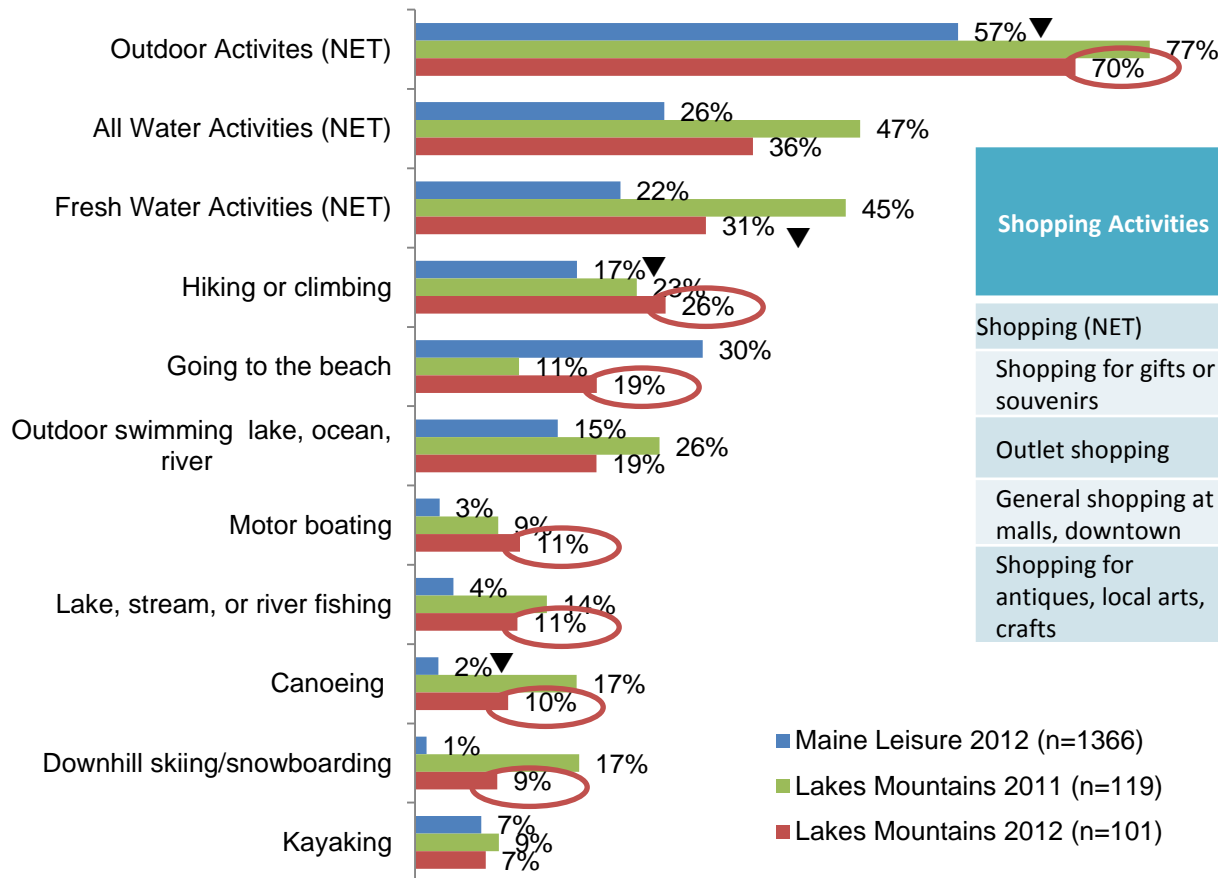
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# Overnight Leisure Outdoor Trip Activities

- Visitors to the Lakes and Mountains participated in a wide variety of outdoor activities, including various water activities. Fresh water activities experienced a drop in 2012 from the proportion who participated in 2011. Again, many differences are seen in the activities pursued in the Lakes and Mountains region as compared to the rest of Maine.

**Top Outdoor Activities**



Shopping Activities	Maine Leisure 2012 (n=1366)	Lakes Mountains 2011 (n=119)	Lakes Mountains 2012 (n=101)
Shopping (NET)	69%	42%	41%
Shopping for gifts or souvenirs	33%	21%	18%
Outlet shopping	36%	17%	18%
General shopping at malls, downtown	31%	15%	10%
Shopping for antiques, local arts, crafts	20%	14%	15%

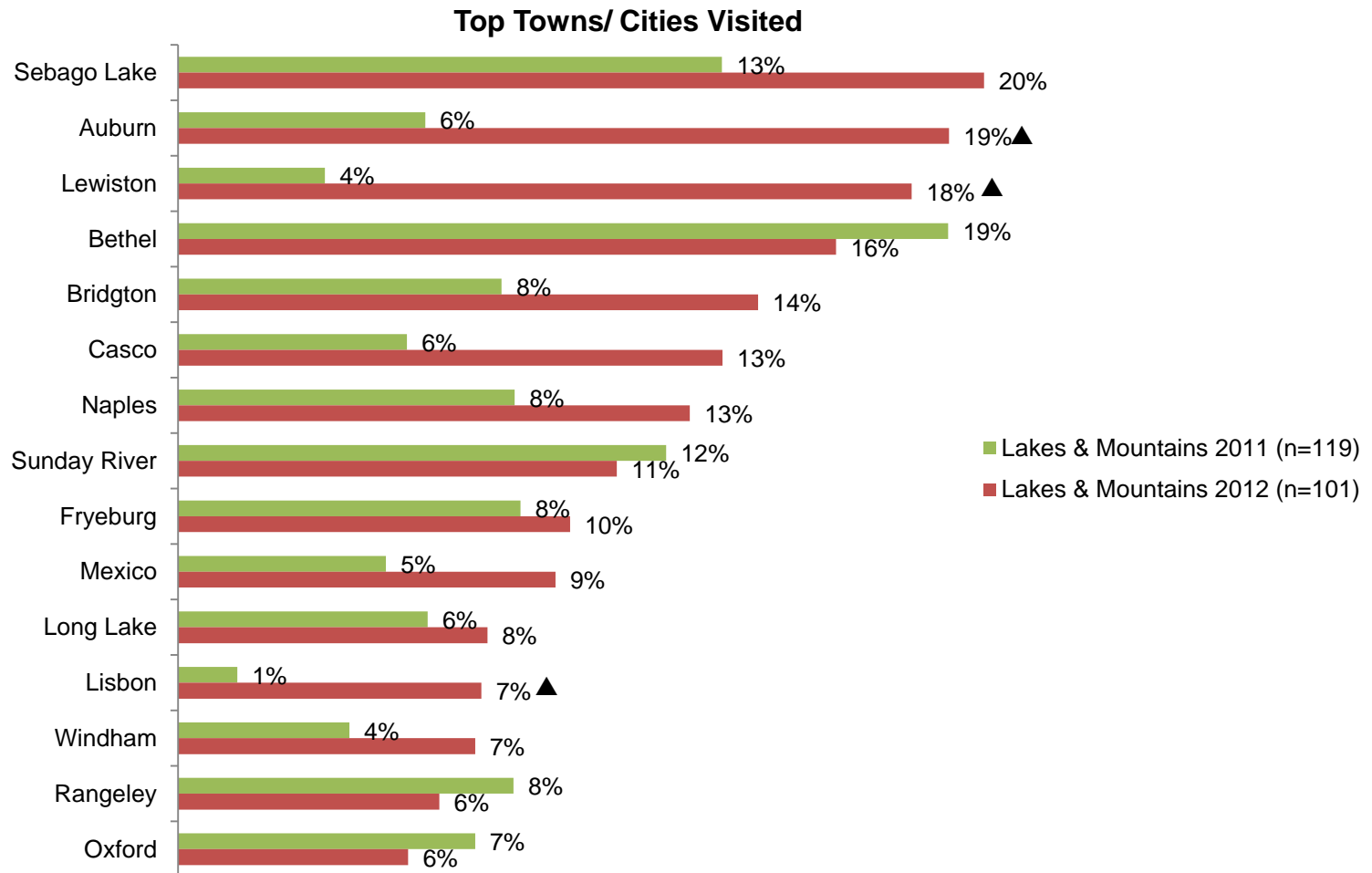
Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

▲ ▼ 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.

# Towns & Cities Visited

- One-fifth of overnight leisure visitors to the Lakes and Mountains region spent time at Sebago Lake, Auburn, or Lewiston while visiting. Lewiston, Auburn, and Lisbon all experienced an increase in the proportion of overnight visitors between 2011 and 2012.



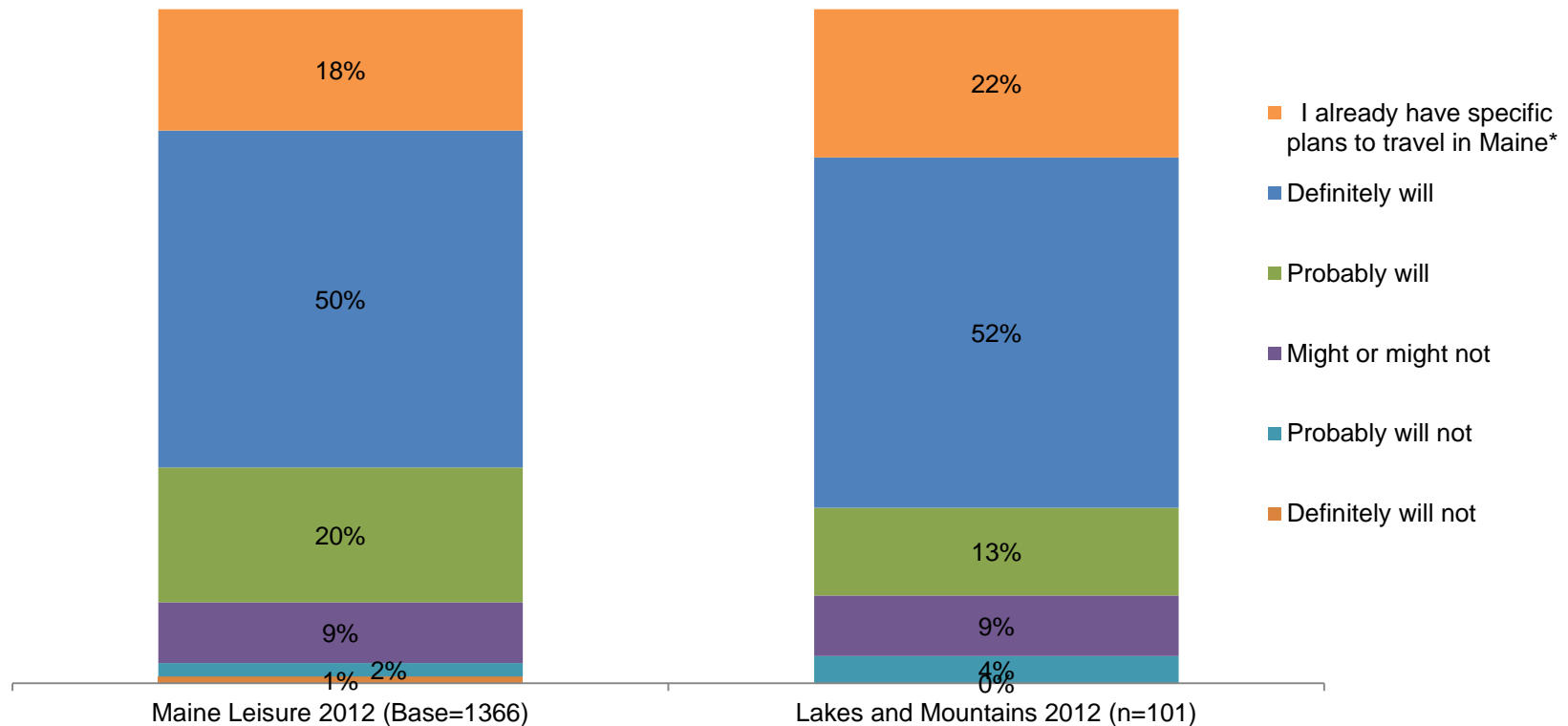
Regional Q31: Within the region you visited, what specific towns or cities did you visit?

▲▼ 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.

# Future Travel Likelihood

- Three-fourths of overnight leisure visitors to the Lakes and Mountains region indicated that they *definitely would travel to Maine in the next two years or already had specific plans to do so*. This is comparable to the proportion who responded similarly among visitors to the State of Maine as a whole.



Regional Q37. How likely will you be to travel 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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Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.



# Day Leisure Visitors: *Traveler Description*



# Sample Size Caution:

*Please note the small sample size of day leisure visitors to the Lakes and Mountains region (50). Data on the following pages should be used for directional purposes only.*



# Day Leisure Visitor Demographics

- There was a significant year-over-year increase in the proportion of leisure day visitors to the Lakes & Mountains region who are employed full-time. On average, day visitors to this region trend similarly to day visitors to the whole State with the exception of a greater proportion who are employed full-time.

Day, Leisure Visitors	Maine Leisure 2012 (n=803)	Lakes & Mountains 2011 (n=91*)	Lakes & Mountains 2012 (n=50*)
Age:			
< 35	19%▼	24%	20%
35 - 44	17%	9%	15%
45 - 54	22%	24%	19%
55 +	41%	43%	46%
Mean Age (Years)	49.0▲	48.4	48.6
Income:			
< \$50,000	15%	20%	21%
\$50,000 - \$99,000	44%	47%	44%
\$100,000 +	41%	33%	35%
Mean Income (Thousands)	\$101.11▲	\$86.51	\$89.37
Female	47%	58%	35%q
College Degree or Higher	72%	65%	73%
Married	64%	53%	62%
Employed Full Time	60%	59%	76%▲

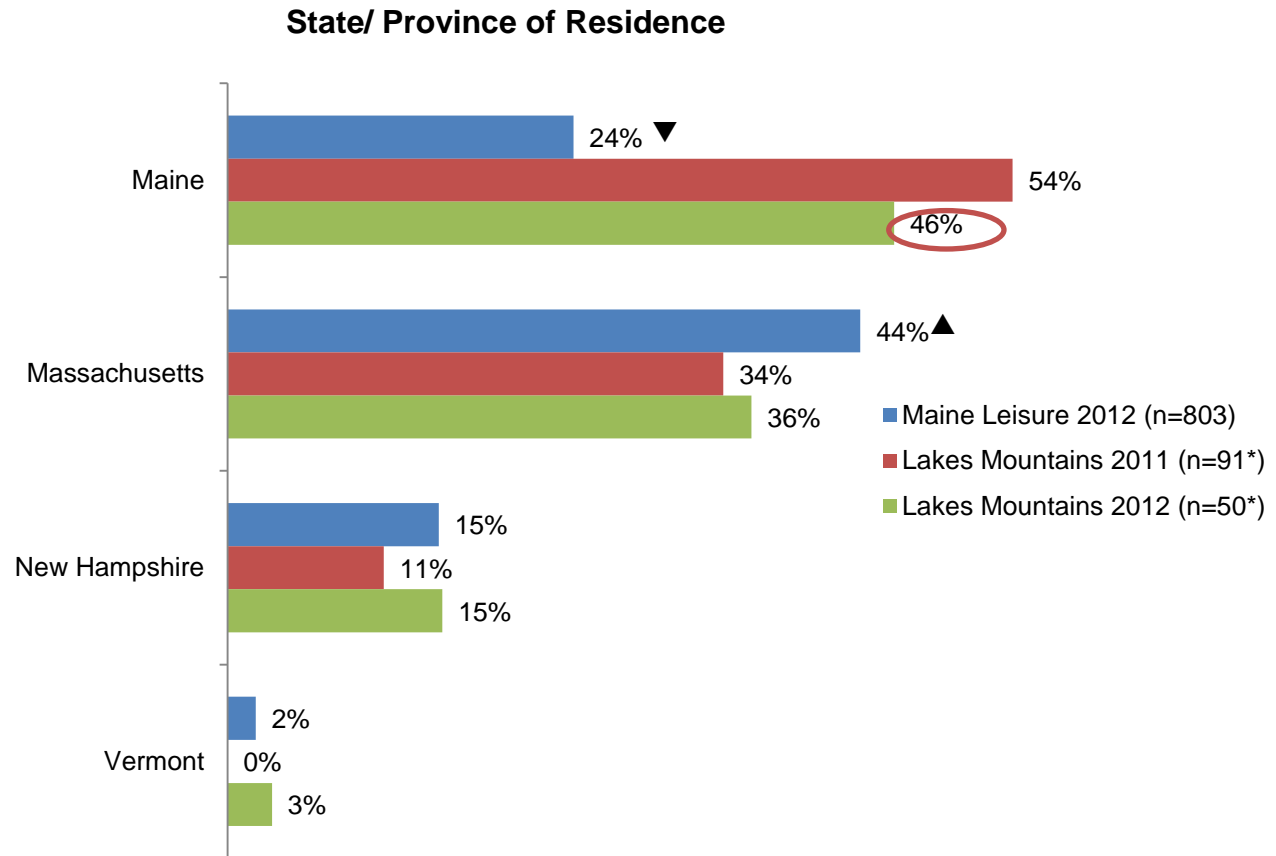
\*Please note small sample size. Data should be used for directional purposes only.

▲▼ 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.

# Day Leisure Visitor Residence

- Half of leisure day visitors to the Lakes & Mountains region were from Maine, a result consistent with levels seen in 2010 and 2011 and significantly higher than the proportion visiting the rest of the State. Aside from the relatively large percentage of Maine residents, the Lakes & Mountains region also attracts a high proportion of leisure day visitors from Massachusetts.



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

\*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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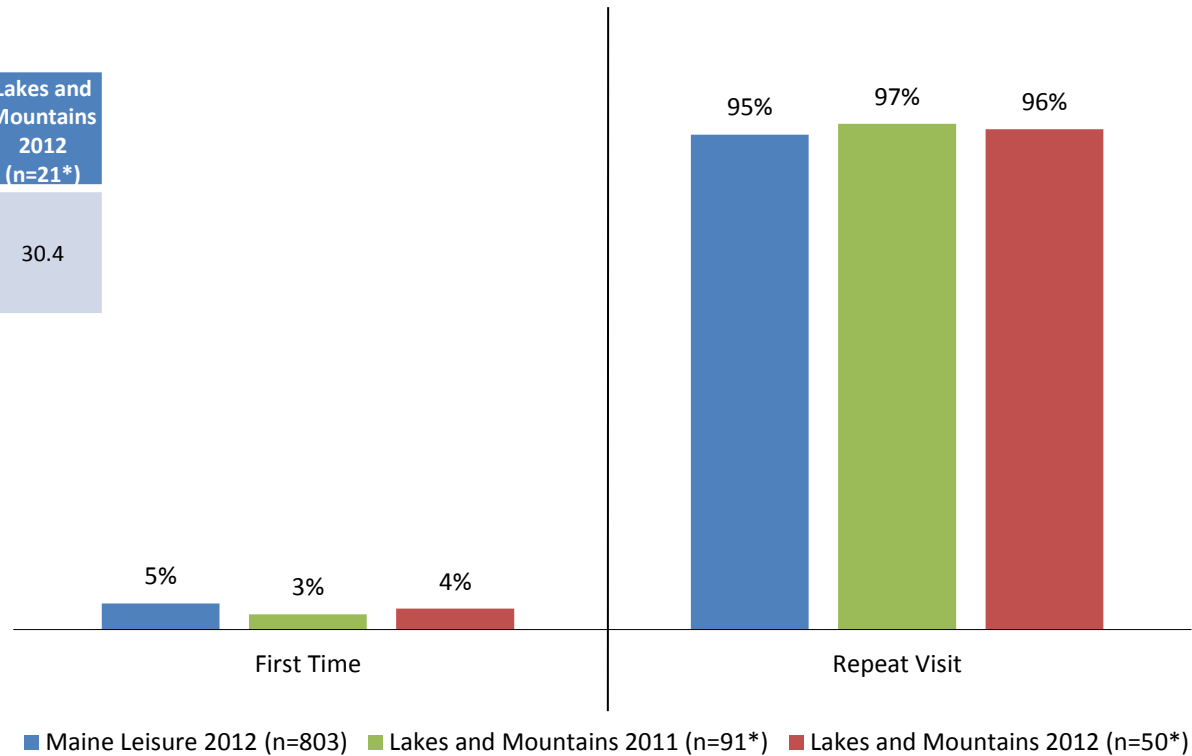
# Day Leisure Visitors: *Trip Experience*



# First-Time vs. Repeat Visitors

- Very few day leisure visitors to the Lakes and Mountains region in 2012 were visiting for the first time, a proportion consistent with 2011 and with day leisure visitors to the State as a whole.

Repeat Leisure Day Visitors	Maine Leisure 2012 (n=510)	Lakes and Mountains 2012 (n=21*)
Average number of trips to Maine in past 5 years	22.5	30.4



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?

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

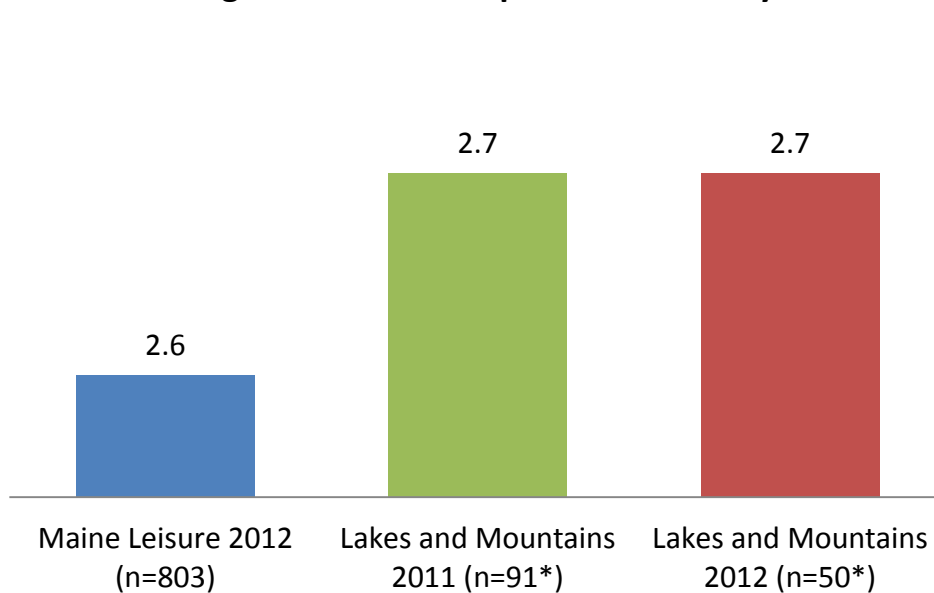
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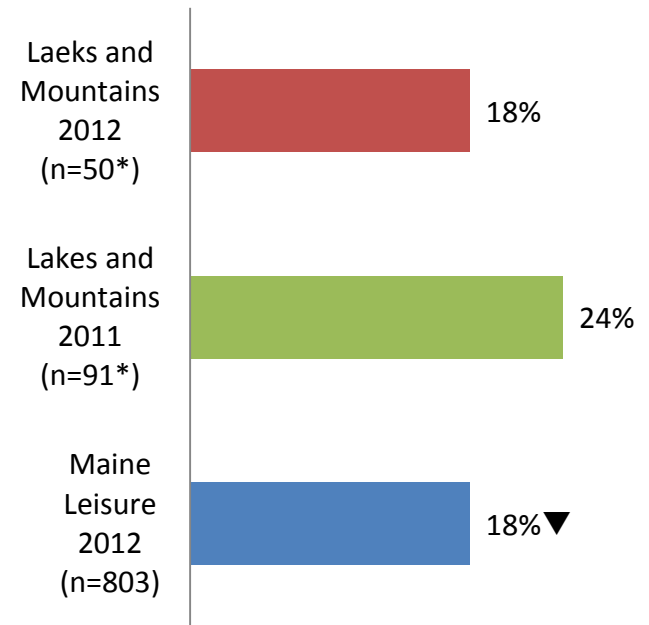
# Party Size and Composition

- One-fifth of day leisure visitors to the Lakes and Mountains region were traveling with children, the same proportion as for those visiting the rest of Maine.

**Average Number of People in Travel Party**



**Percent Traveling with Children**



- Maine Leisure 2012 (n=803)
- Lakes and Mountains 2011 (n=91\*)
- Laeks and Mountains 2012 (n=50\*)

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

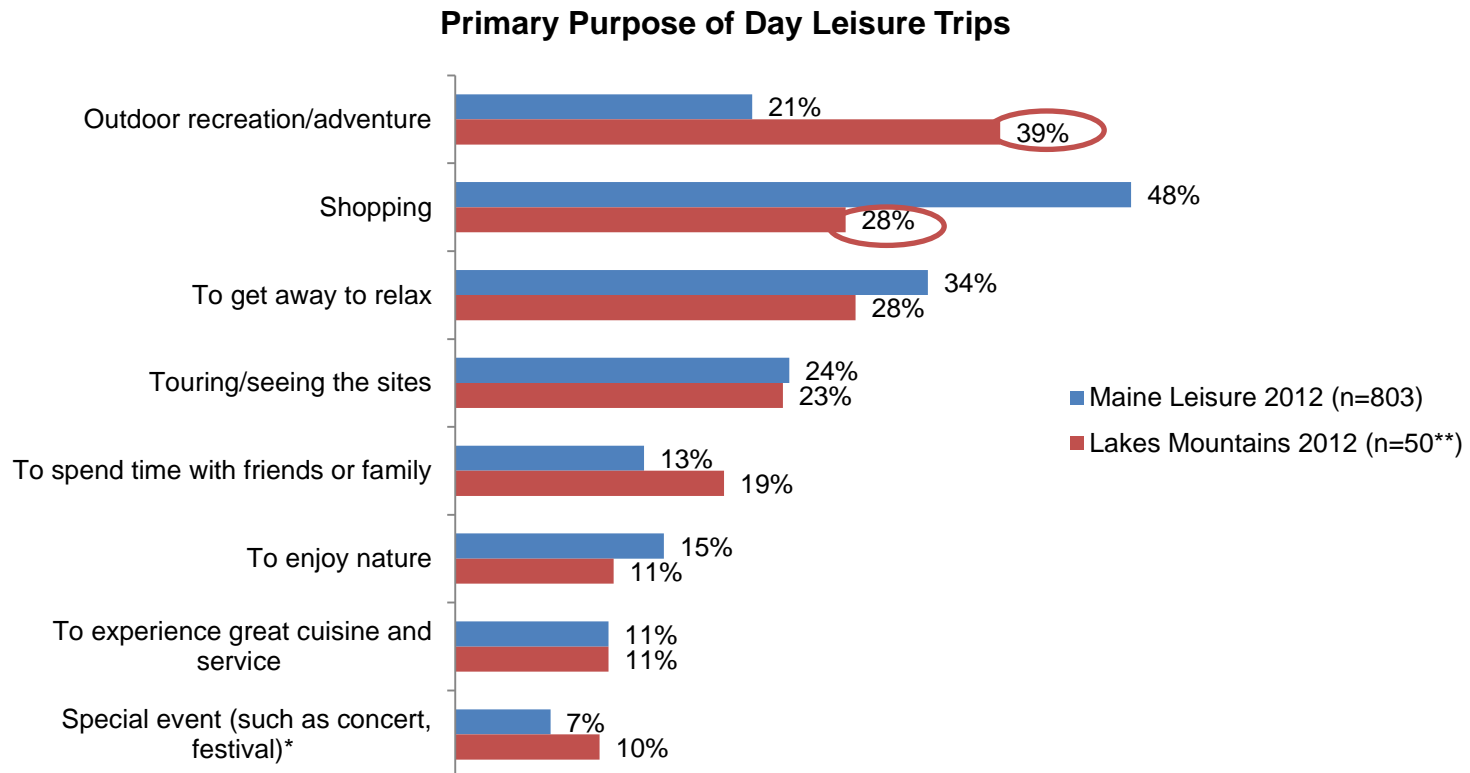
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# Primary Purpose of Day Leisure Trips

- As was the case with overnight leisure visitation to the Lakes & Mountains, outdoor recreation was a key primary trip purpose for this region. Shopping is not as popular in the Lakes and Mountains as it is in other parts of the state.



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.

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

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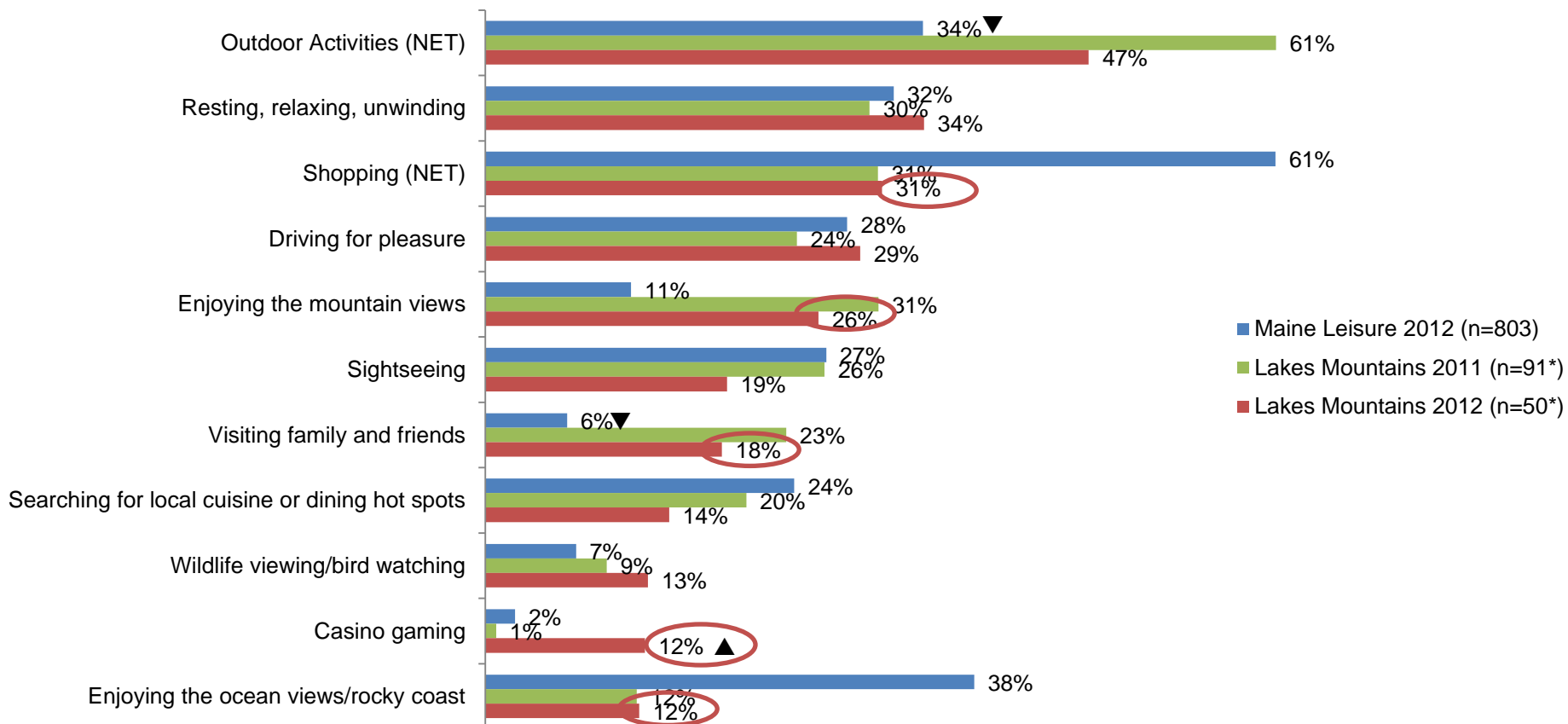
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# Day Leisure Trip Activities

- Similar to overnight visitors to the Lakes and Mountains region, outdoor recreation activities were the most widely cited activity conducted by leisure day visitors to this area. Activities that were more popular in the Lakes and Mountains region than in the rest of the State include *enjoying the mountain views, visiting family and friends, and casino gaming*, while less popular activities include *shopping and enjoying ocean views*.

**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).

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

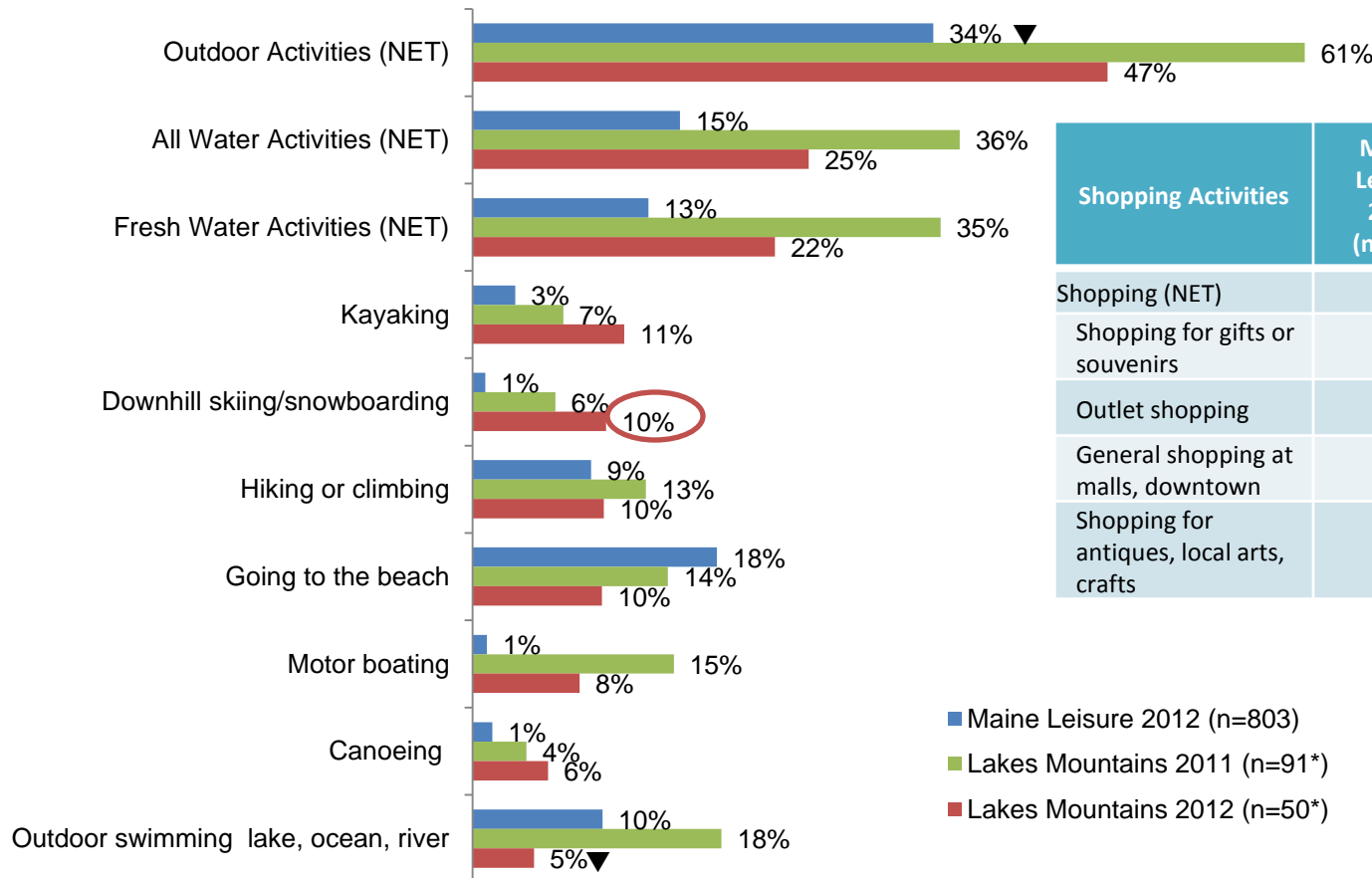
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# Day Leisure Outdoor Trip Activities

- Visitors to the Lakes and Mountains region enjoy a variety of outdoor activities. Participation in outdoor swimming decreased in 2012 as compared to 2011, returning to levels seen in 2010. Not surprisingly, *downhill skiing/snowboarding* was more popular among day visitors to this region as compared to the rest of the State.

## Top Outdoor Activities



Shopping Activities	Maine Leisure 2012 (n=803)	Lakes Mountains 2011 (n=91*)	Lakes Mountains 2012 (n=50*)
Shopping (NET)	61%	31%	31%
Shopping for gifts or souvenirs	18%	11%	10%
Outlet shopping	32%	13%	24%
General shopping at malls, downtown	26%	13%	9%
Shopping for antiques, local arts, crafts	15%	6%	6%

■ Maine Leisure 2012 (n=803)  
 ■ Lakes Mountains 2011 (n=91\*)  
 ■ Lakes Mountains 2012 (n=50\*)

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.

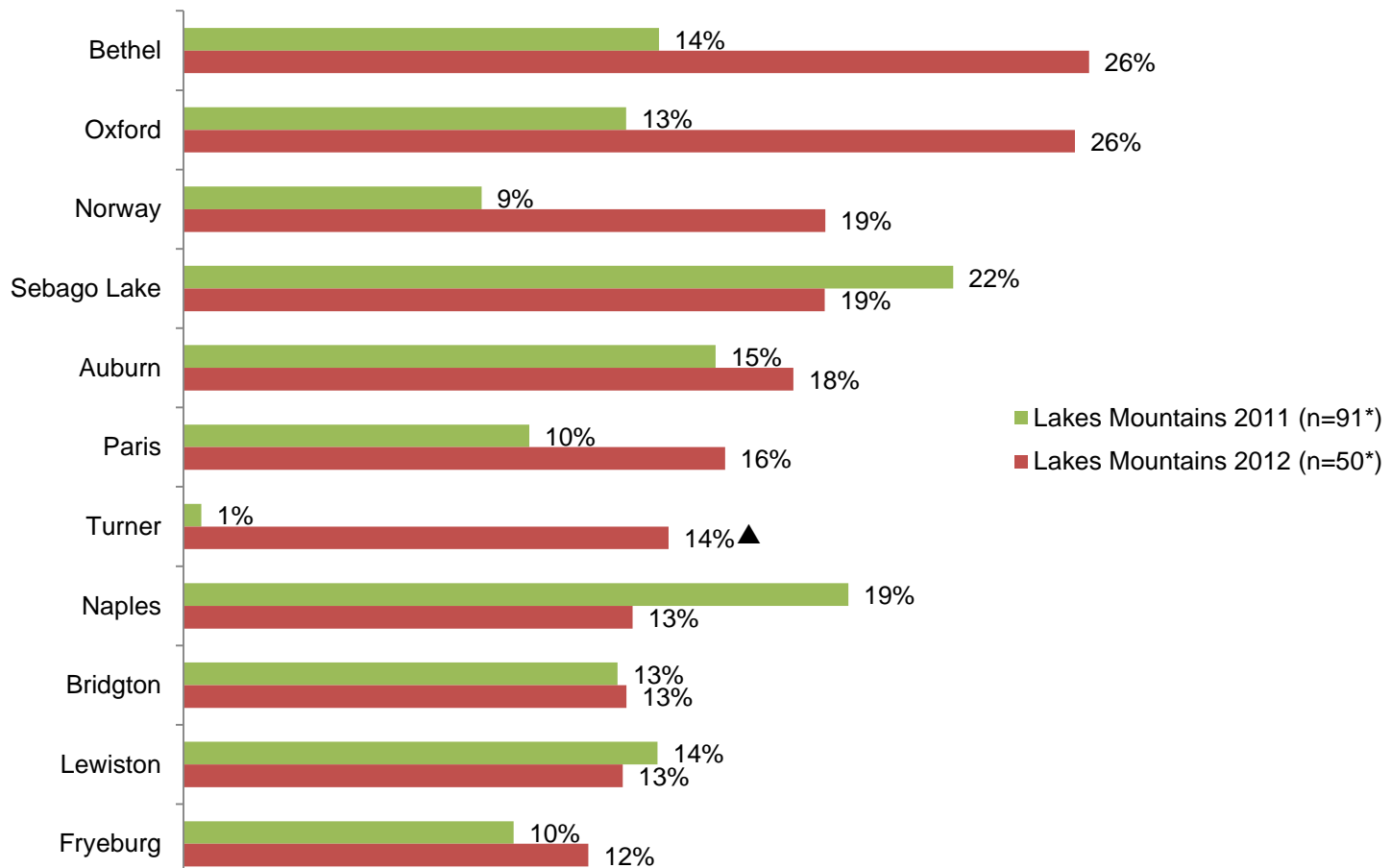
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Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

# Towns & Cities Visited

- Bethel and Oxford were the most widely visited towns among day visitors to the Lakes and Mountains region in 2012, followed by Norway, Sebago Lake, and Auburn. Turner experienced an increase in its proportion of day visitors in 2012 as compared to 2011.

**Top Towns/Cities Visited**



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

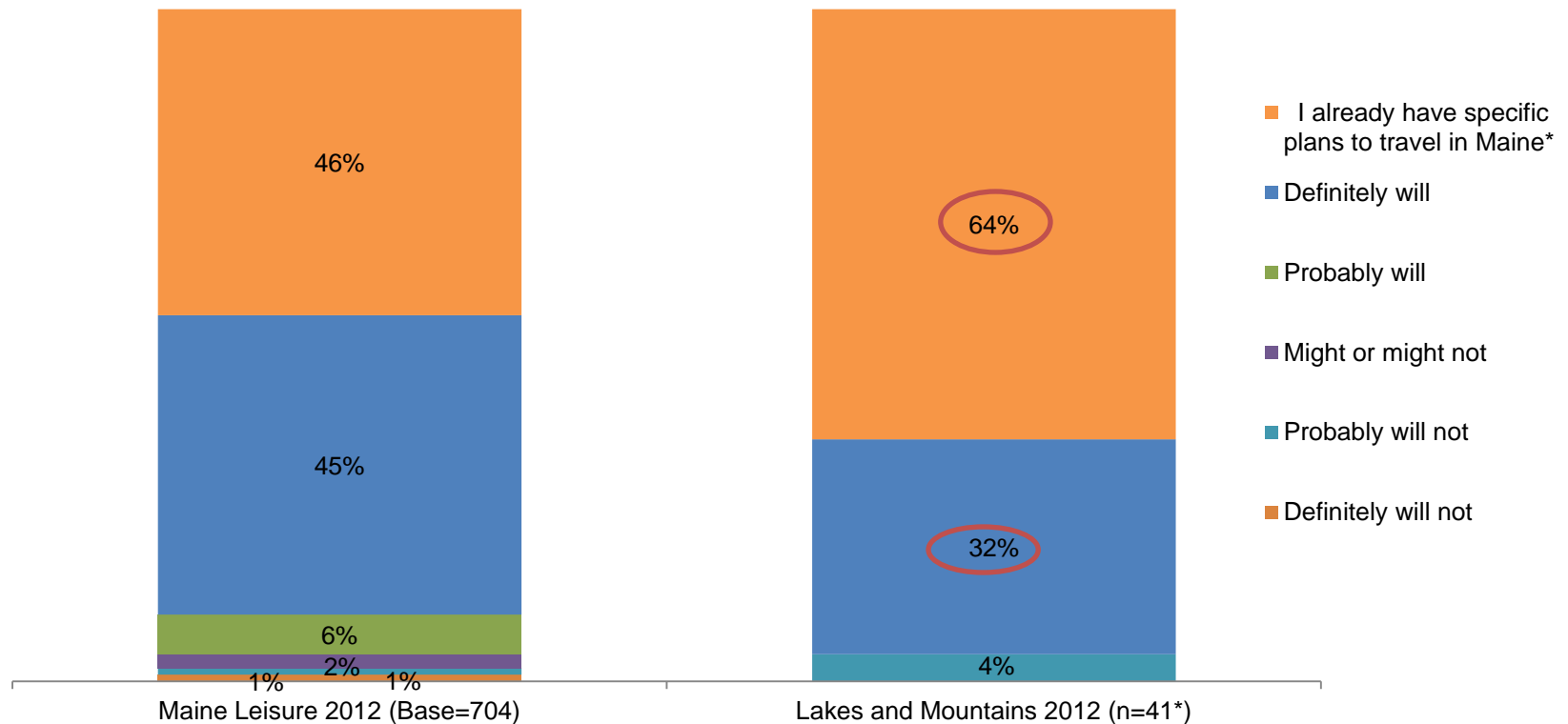
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# Future Travel Likelihood

- Two-thirds of Lakes and Mountains day leisure visitors indicate that they *have specific plans to visit Maine in the next two years*. In total, 96% either have specific plans to visit the State or report that they definitely will visit. These proportions are greater than for day leisure visitors to the State of Maine as a whole.



\*Added in Summer 2012. Due to a revision to response options and question wording in 2012, data is being shown only for 2012. Please note very small sample size. Data should be used for directional purposes only.

Day Q19. How likely will you be to take a day trip in Maine in the next two years?

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

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# Comparison of *Lakes and Mountains* Visitors to Maine Visitors



# Comparisons

- Visitors to the Lakes and Mountains 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 Lakes and Mountains region, as well as the gaming options available.
- Highlights:
  - **Visitor Origin**
    - A greater proportion of overnight visitors from **Maine**
  - **Visitor Demographics**
    - Overnight visitors **more** likely to be **under the age of 35**.
    - Day visitors **more** likely to be **employed full-time**.
    - Overnight visitors **more** likely to be **first-time visitors**.

# Comparisons Continued

- Highlights Continued:
  - **Primary Purpose of Trip**
    - Overnight visitors **more** likely to be traveling for:
      - Outdoor recreation (**day visitors also**)
      - To enjoy nature
      - To spend time with family/friends
    - Overnight visitors **less** likely to be visiting for:
      - Shopping (**day visitors also**)
      - Touring
      - Experience great cuisine
  - **Trip Activities – Overnight Visitors**
    - **More** likely to be:
      - Outdoor recreation
      - Enjoying the mountain views
    - **Less** likely to be:
      - Shopping
      - Sightseeing
      - Enjoying the ocean views
      - Driving for pleasure

# Comparisons Continued

- Highlights Continued:
  - **Trip Activities – Day Visitors**
    - **More likely to be:**
      - Enjoying the mountain views
      - Casino gaming
      - Downhill skiing/snowboarding
      - Spending time with family/friends
      - Searching for local cuisine or dining hot spots
    - **Less likely to be:**
      - Shopping
      - Enjoying the ocean views
  - **Future Travel Likelihood**
    - Day Visitors **more** likely to indicate that they will travel to Maine in the next two years.





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