

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

Regional Insights: Maine Highlands

Prepared by



April 2013

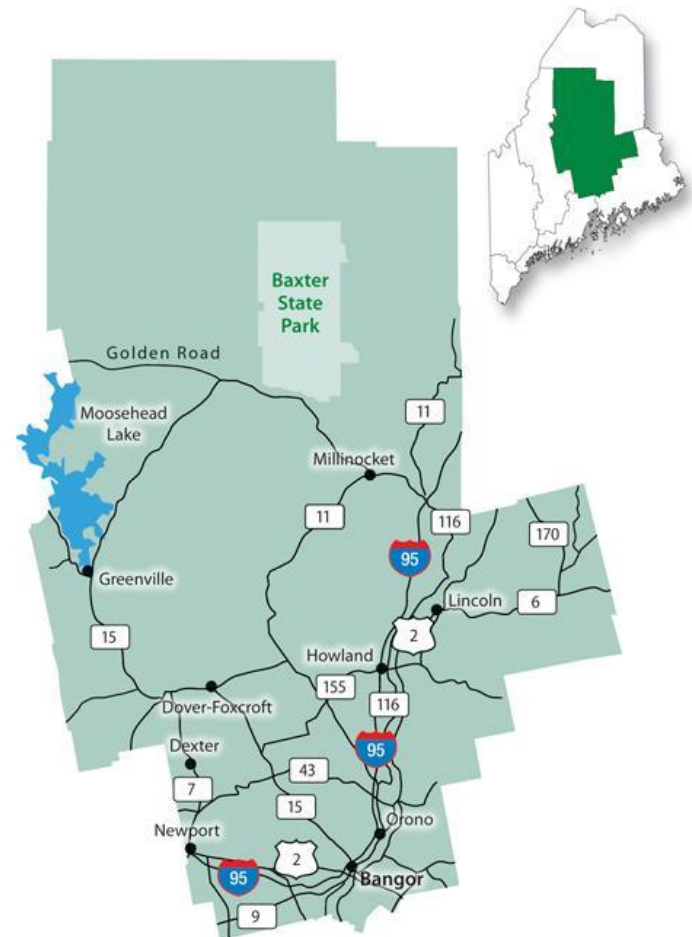
Introduction and Methodology



- 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 **Maine Highlands** tourism region, and is based on:
 - 156 overnight leisure visitors, and
 - 67 day leisure visitors.



Overnight Leisure Visitors: *Traveler Description*



Overnight Leisure Visitor Demographics

- There were no statistically significant changes in the demographic profile of overnight leisure visitors to the Maine Highlands between 2011 and 2012. Overnight visitors to this region do differ somewhat from visitors to the rest of Maine on a few characteristics. Overall, visitors to the Maine Highlands are younger and less affluent.

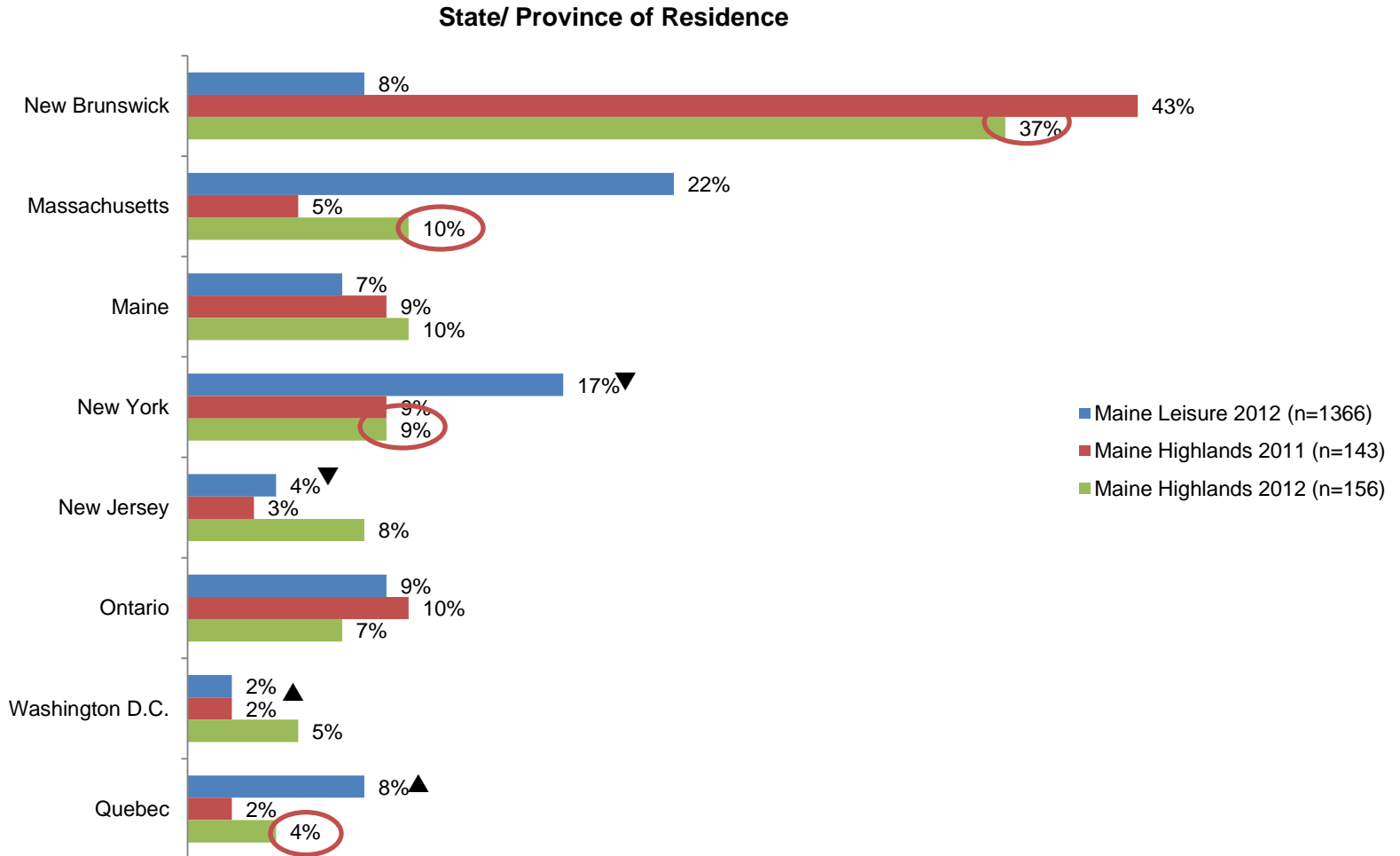
Overnight, Leisure Visitors	Maine Leisure 2012 (n=1366)	Highlands 2011 (n=143)	Highlands 2012 (n=156)
Age:			
< 35	22%▼	27%	28%
35 - 44	17%	11%	17%
45 - 54	22%	32%	32%
55 +	39%▲	30%	23%
Mean Age (Years)	48.7	45.7	45.3
Income:			
< \$50,000	10%	13%	15%
\$50,000 - \$99,000	32%	39%	45%
\$100,000 +	43%	36%	28%
Mean Income (Thousands)	\$113.47	\$99.19	\$93.38
Female	49%▼	44%	47%
College Degree or Higher	79%▲	69%	73%
Married	63%	64%	60%
Employed Full Time	60%	72%	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

- Consistent with 2011, the largest percentage of overnight leisure visitors to the Maine Highlands region is from New Brunswick, a significantly higher proportion than of visitors to the rest of the State. The next highest proportion of visitors to this region arrive from Massachusetts, Maine, and New York.



State/Province of residence.

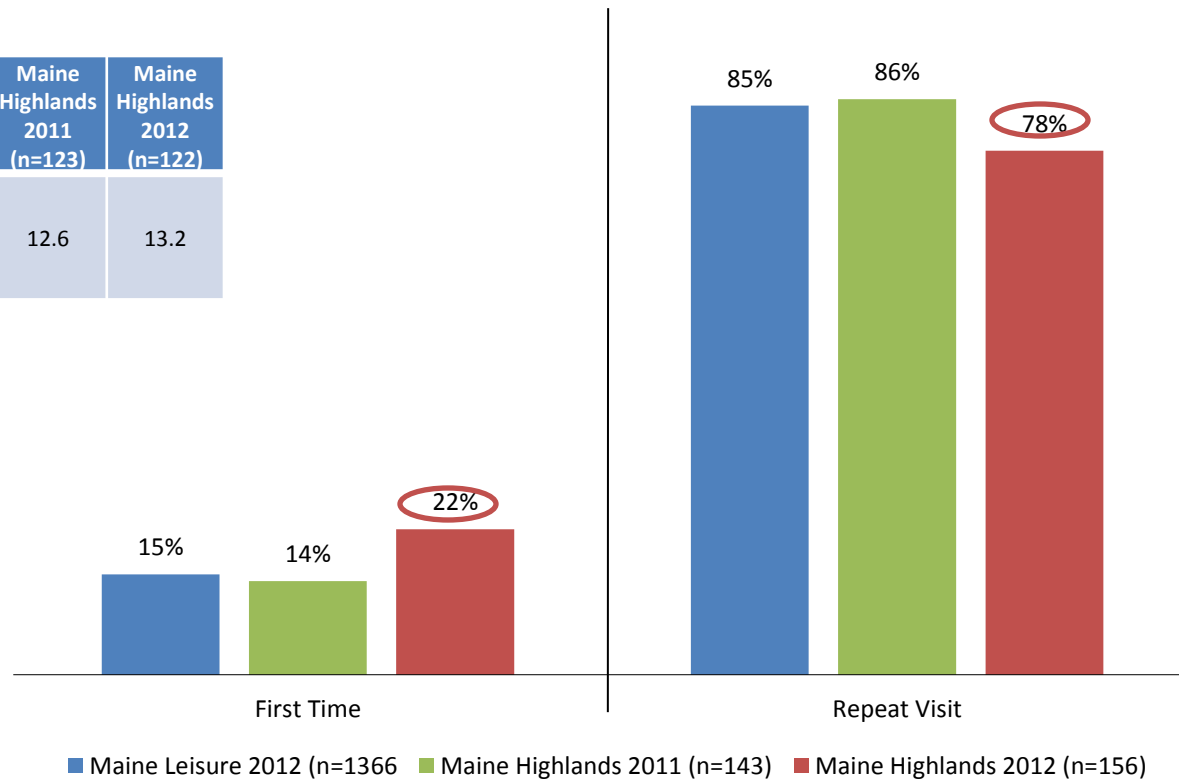
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Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

First-Time vs. Repeat Visitors

- One-fifth of overnight leisure visitors to the Maine Highlands region are visiting Maine for the first time, a significantly greater proportion than the rest of the State of Maine.

Repeat Overnight Leisure Visitors	Maine Leisure 2012 (n=1159)	Maine Highlands 2011 (n=123)	Maine Highlands 2012 (n=122)
Average number of trips to Maine in past 5 years	13.5	12.6	13.2



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?

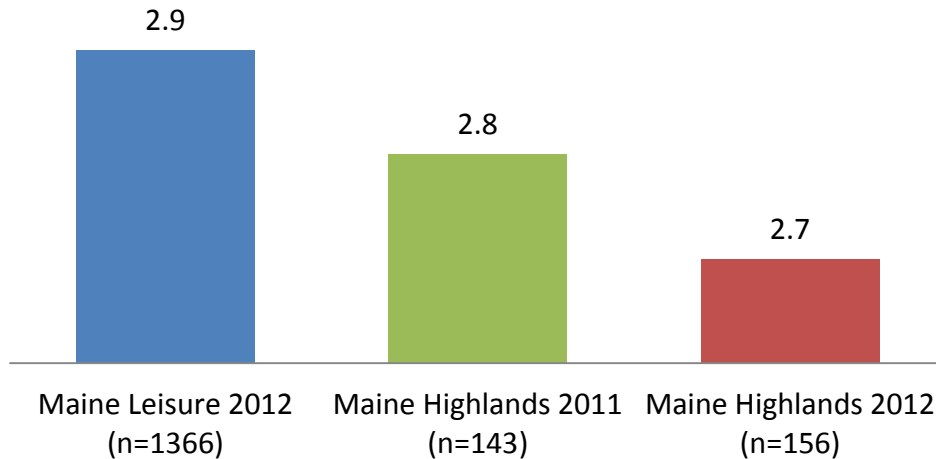
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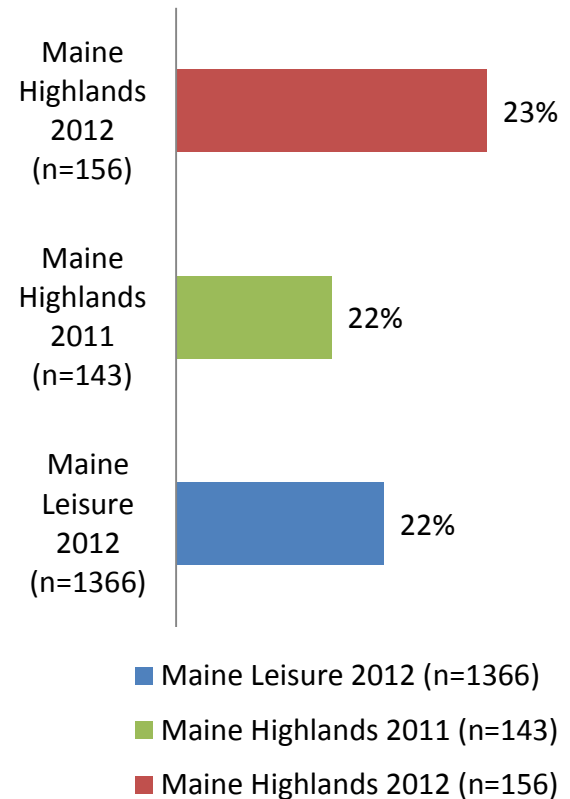
Party Size and Composition

- One-fourth of overnight leisure visitors to the Maine Highlands region traveled with children on their 2012 visit to the region, similar to the proportion doing so for the State as a whole.

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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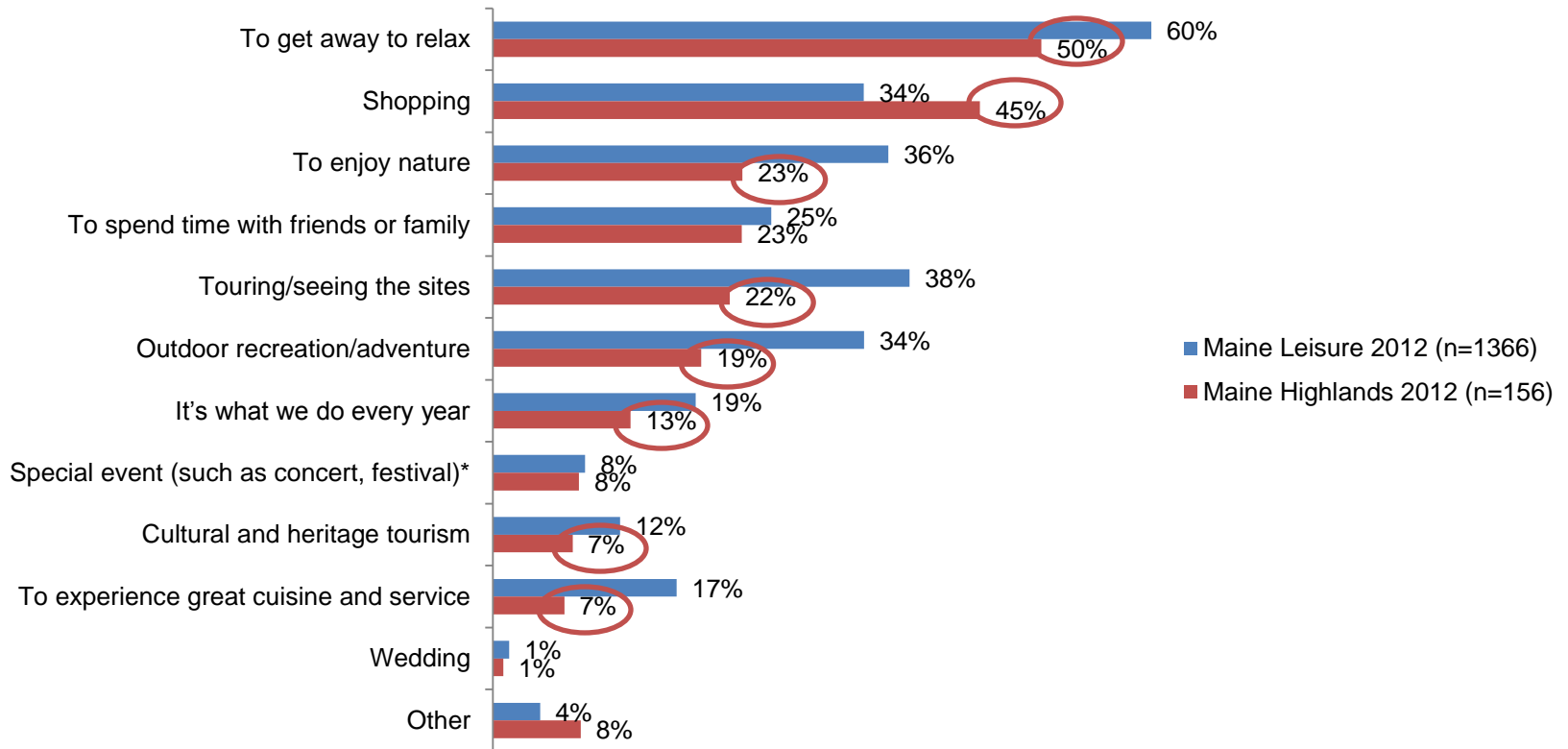
Overnight Leisure Visitors: *Trip Experience*



Primary Purpose of Overnight Leisure Trips

- The lure of *shopping* opportunities and *getting away to relax* were the primary reasons overnight visitors to the Maine Highlands region planned their trip to Maine.
- There were several differences in the reported purpose of their trip between visitors to the Maine Highlands and visitors to the rest of the State. This region's visitors were more likely to be visiting to *shop* and less likely to be visiting *to get away to relax, to enjoy nature, for touring, and for outdoor recreation*.

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.

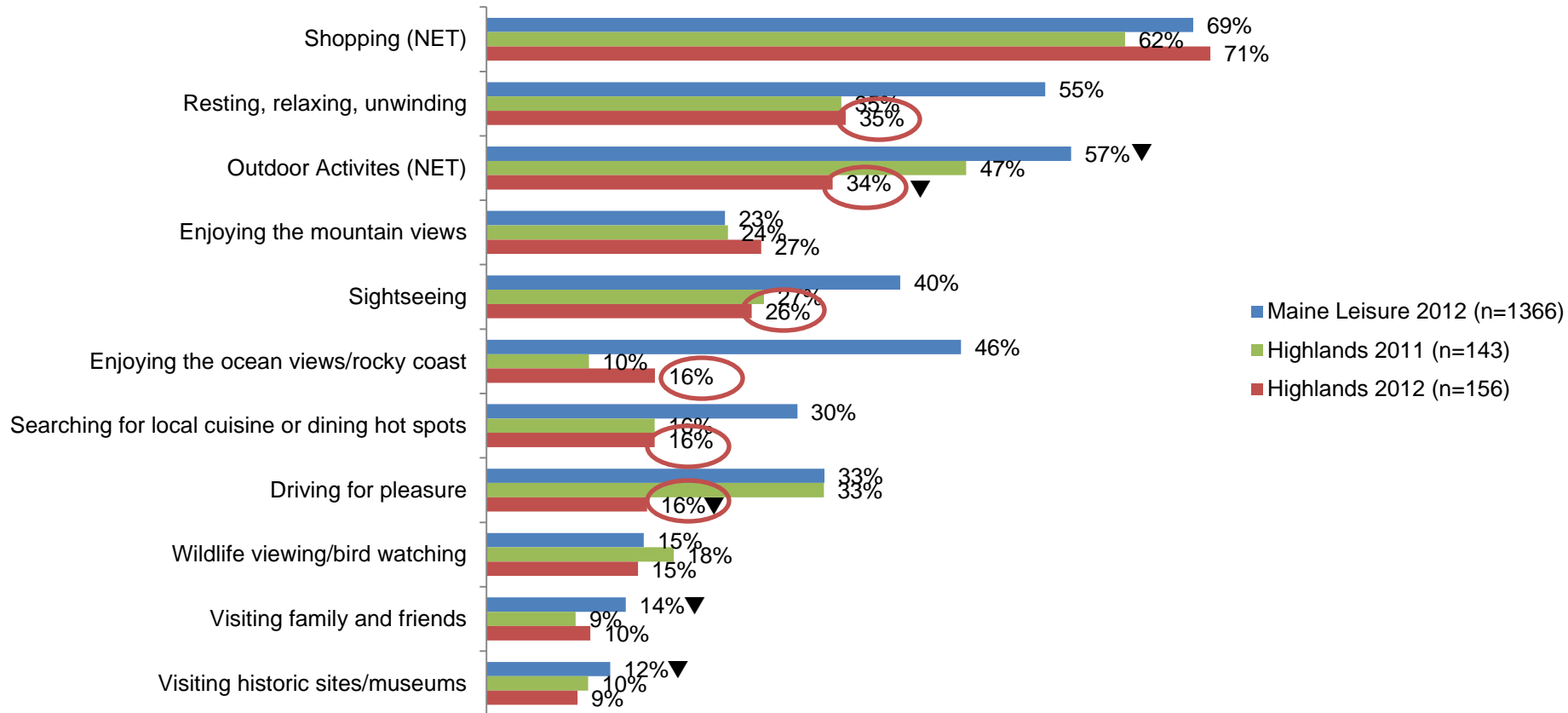
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Overnight Leisure Trip Activities

- Consistent with 2011, three-fourths of overnight leisure visitors to the Maine Highlands region did some *shopping* while visiting, a proportion twice as much as the next most popular activities – *resting/relaxing/unwinding* and *various outdoor activities*.
- Consistent with visitors' stated primary purpose of their trip, several activities are less popular in this region than in other parts of the State, as illustrated with the red circled items in the chart below.

Top Trip Activities

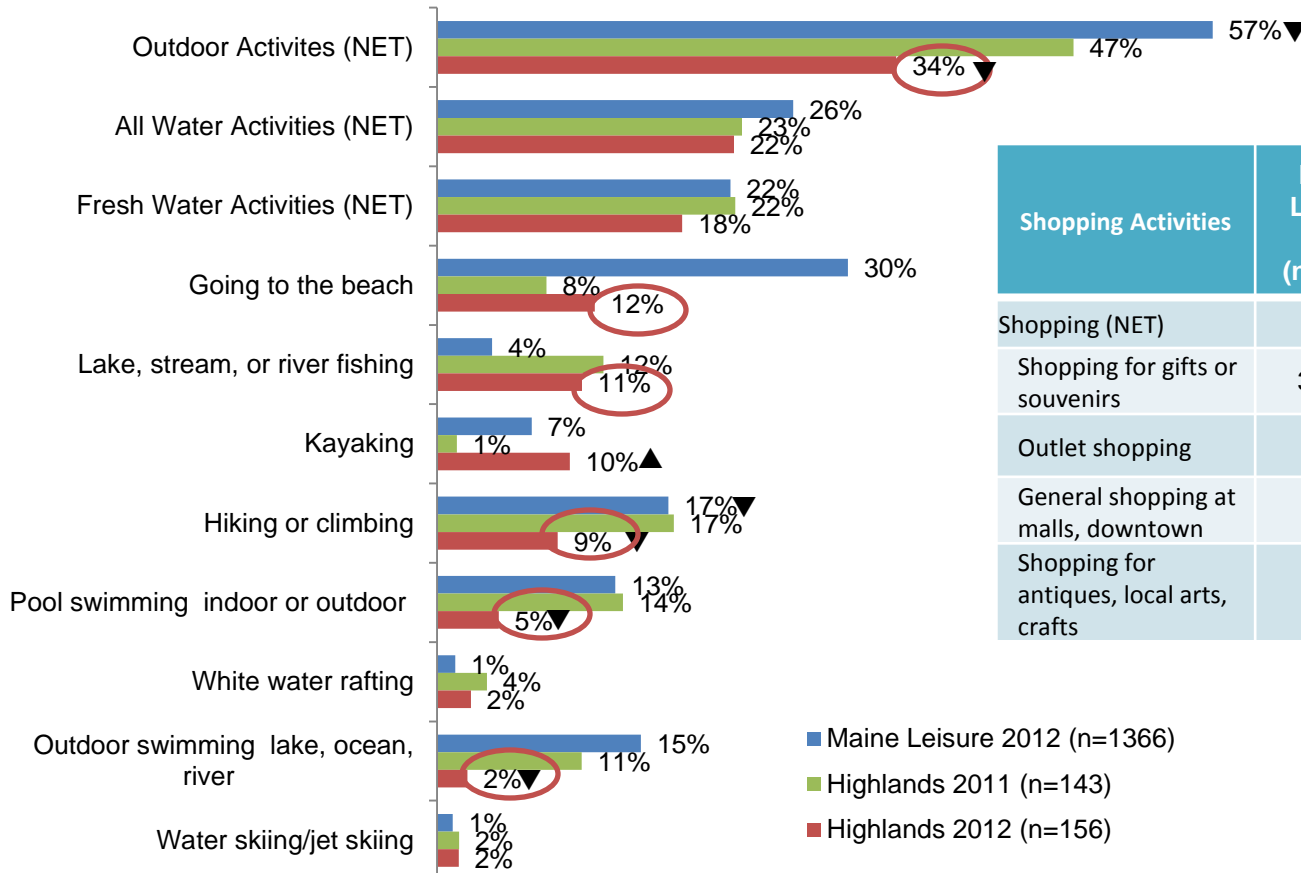


Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).
 ▲▼ notes significant difference between 2011 and 2012 at the 95% confidence level.
 Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Overnight Leisure Outdoor Trip Activities

- Among leisure visitors to the Maine Highlands region, various water activities are the most popular outdoor activities. 2012 saw an increase in kayaking in this region, and decreases in hiking/climbing, pool swimming, and outdoor swimming.

Top Outdoor Activities



Shopping Activities	Maine Leisure 2012 (n=1366)	Highlands 2011 (n=143)	Highlands 2012 (n=156)
Shopping (NET)	69%	62%	71%
Shopping for gifts or souvenirs	33% ▼	31%	31%
Outlet shopping	36%	24%	29%
General shopping at malls, downtown	31%	37%	42%
Shopping for antiques, local arts, crafts	20%	9%	11%

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

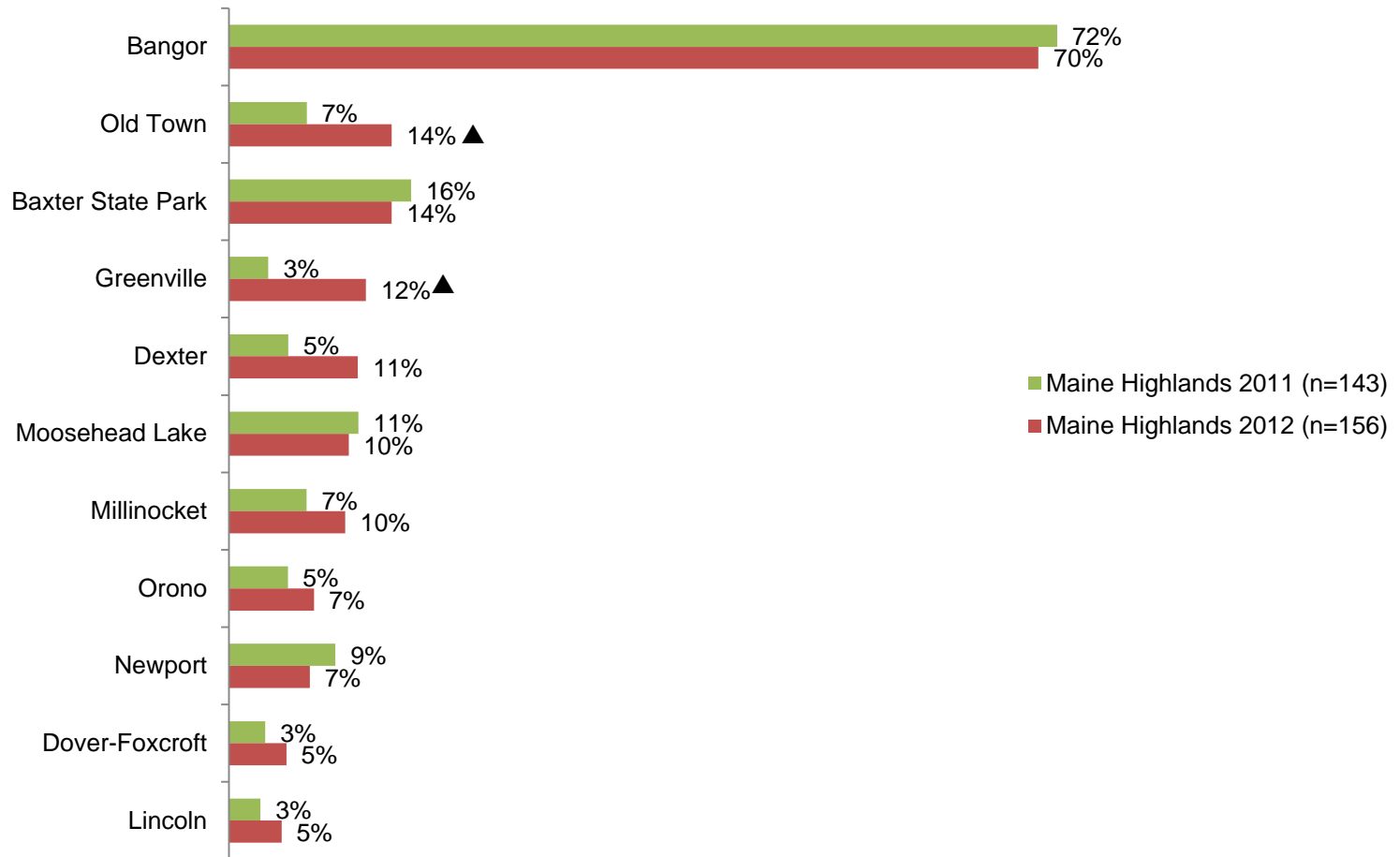
▲ ▼ notes significant difference between 2011 and 2012 at the 95% confidence level.

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

Towns & Cities Visited

- Following on the high proportion of overnight visitors citing *shopping* as their primary purpose for visiting, 70% of overnight leisure visitors to the Maine Highlands region spent time in Bangor.
- Old Town and Greenville both experienced an increase in the proportion of overnight leisure visitors to the region in 2012.

Top Towns/Cities Visited



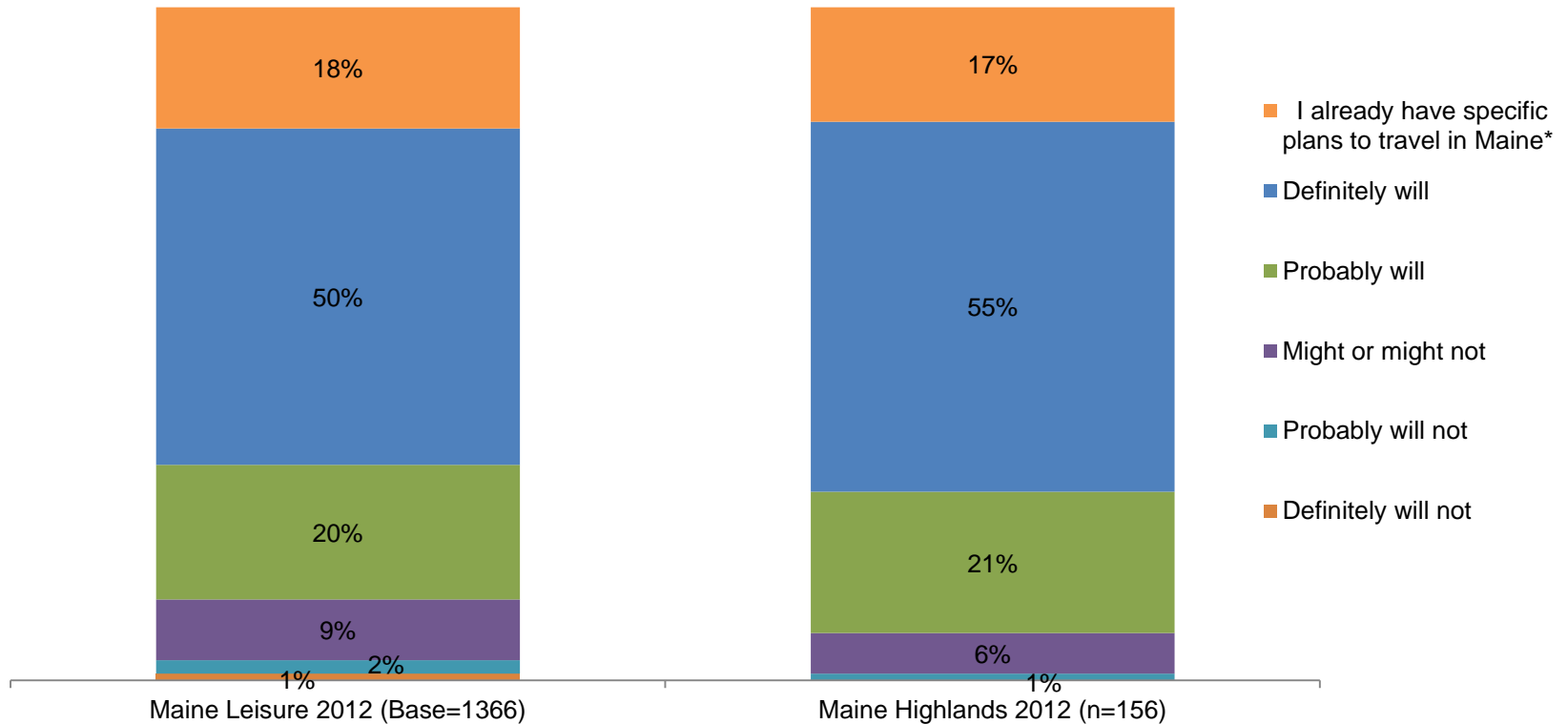
Regional Q31: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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Future Travel Likelihood

- Three-fourths of overnight leisure visitors to the Maine Highlands region indicate that they will travel to Maine again in the next two years, a proportion similar than for visitors to the rest of Maine. Half say they *definitely will* visit Maine, and one-fifth say they *already have specific plans to do so*.



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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Day Leisure Visitors: *Traveler Description*



Sample Size Caution:

Please note the small sample size of day leisure visitors to the Maine Highlands region (67). Data on the following pages should be used for directional purposes only.



Day Leisure Visitor Demographics

- On average, day visitors to the Maine Highlands region are just under 50 years old. Most have a college degree, though this proportion is lower than for day visitors to the State of Maine as a whole. Household incomes are also lower among this region's day visitors as compared to the rest of the State.

Day, Leisure Visitors	Maine Leisure 2012 (n=803)	Maine Highlands 2011 (n=108)	Maine Highlands 2012 (n=67*)
Age:			
< 35	19%▼	16%	18%
35 - 44	17%	17%	27%
45 - 54	22%	27%	16%
55 +	41%	41%	40%
Mean Age (Years)	49.0▲	49.7	49.0
Income:			
< \$50,000	15%	27%	19%
\$50,000 - \$99,000	44%	45%	53%
\$100,000 +	41%	29%	29%
Mean Income (Thousands)	\$101.11▲	\$85.87	\$83.90
Female	47%	60%	41%▼
College Degree or Higher	72%	59%	59%
Married	64%	66%	65%
Employed Full Time	60%	61%	52%

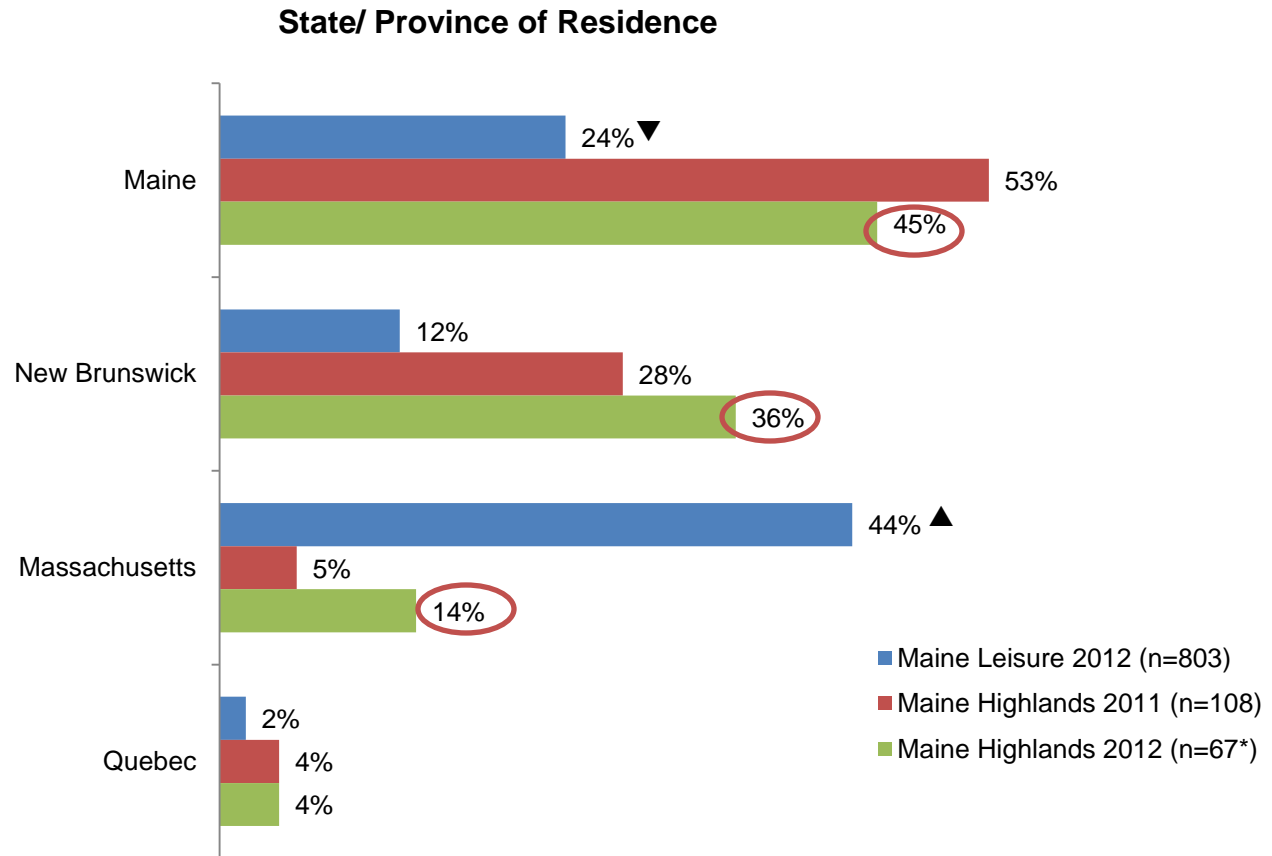
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Day Leisure Visitor Residence

- Nearly half of leisure day visitors to the Maine Highlands region were from Maine, a result consistent with 2010 and 2011 levels. Aside from the relatively large percentage of Maine residents, the Maine Highlands region also attracts a large proportion of leisure day visitors from New Brunswick.
- The Maine Highlands region attracts a larger proportion of in-state day visitors and visitors from New Brunswick than the rest of the State, and a lesser proportion 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.

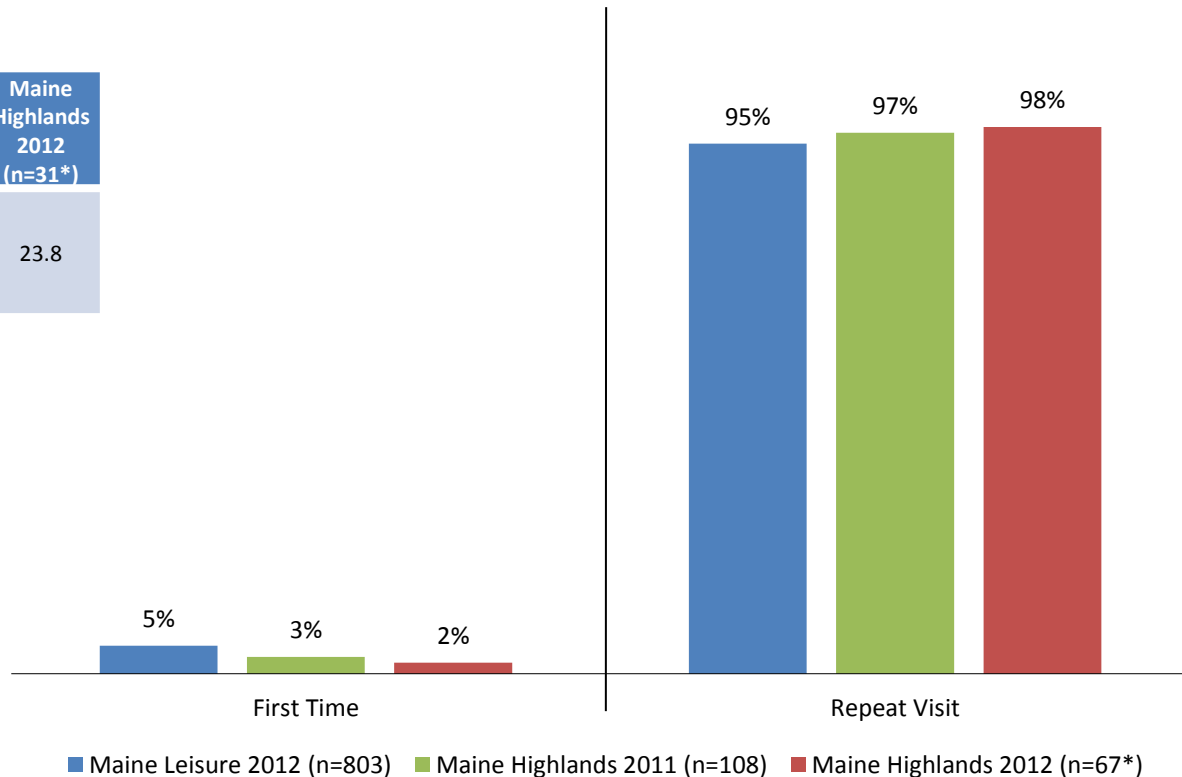
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First-Time vs. Repeat Visitors

- The vast majority of day leisure visitors to the Maine Highlands region are repeat visitors, consistent with the State of Maine as a whole.

Repeat Leisure Day Visitors	Maine Leisure 2012 (n=510)	Maine Highlands 2012 (n=31*)
Average number of trips to Maine in past 5 years	22.5	23.8



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?

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

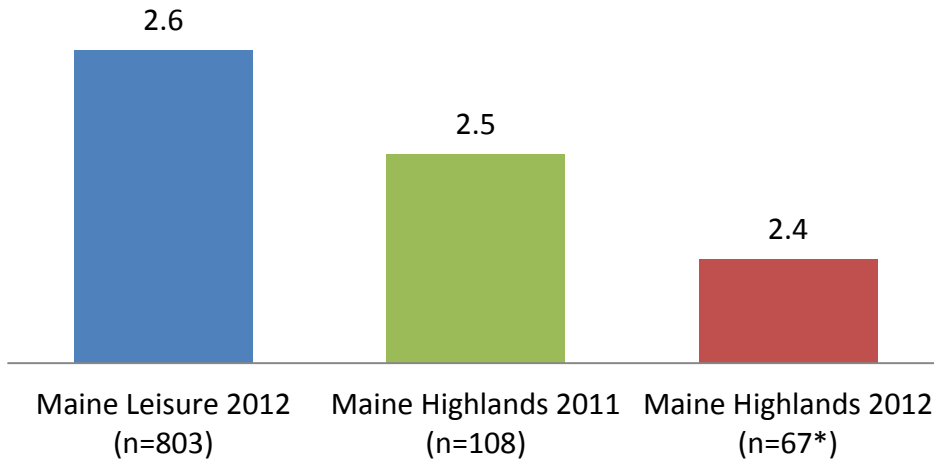
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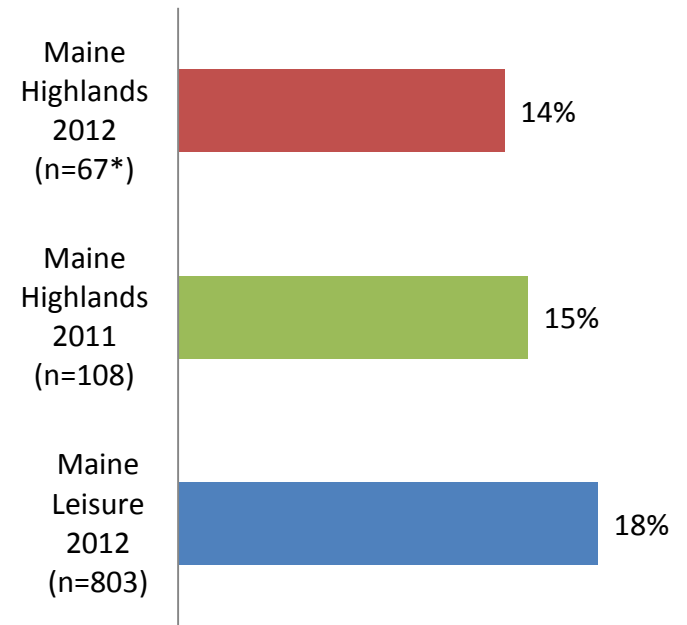
Party Size and Composition

- Most day leisure visitors to the region are not traveling with children (86%).

Average Number of People in Travel Party



Percent Traveling with Children



- Maine Leisure 2012 (n=803)
- Maine Highlands 2011 (n=108)
- Maine Highlands 2012 (n=67*)

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

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

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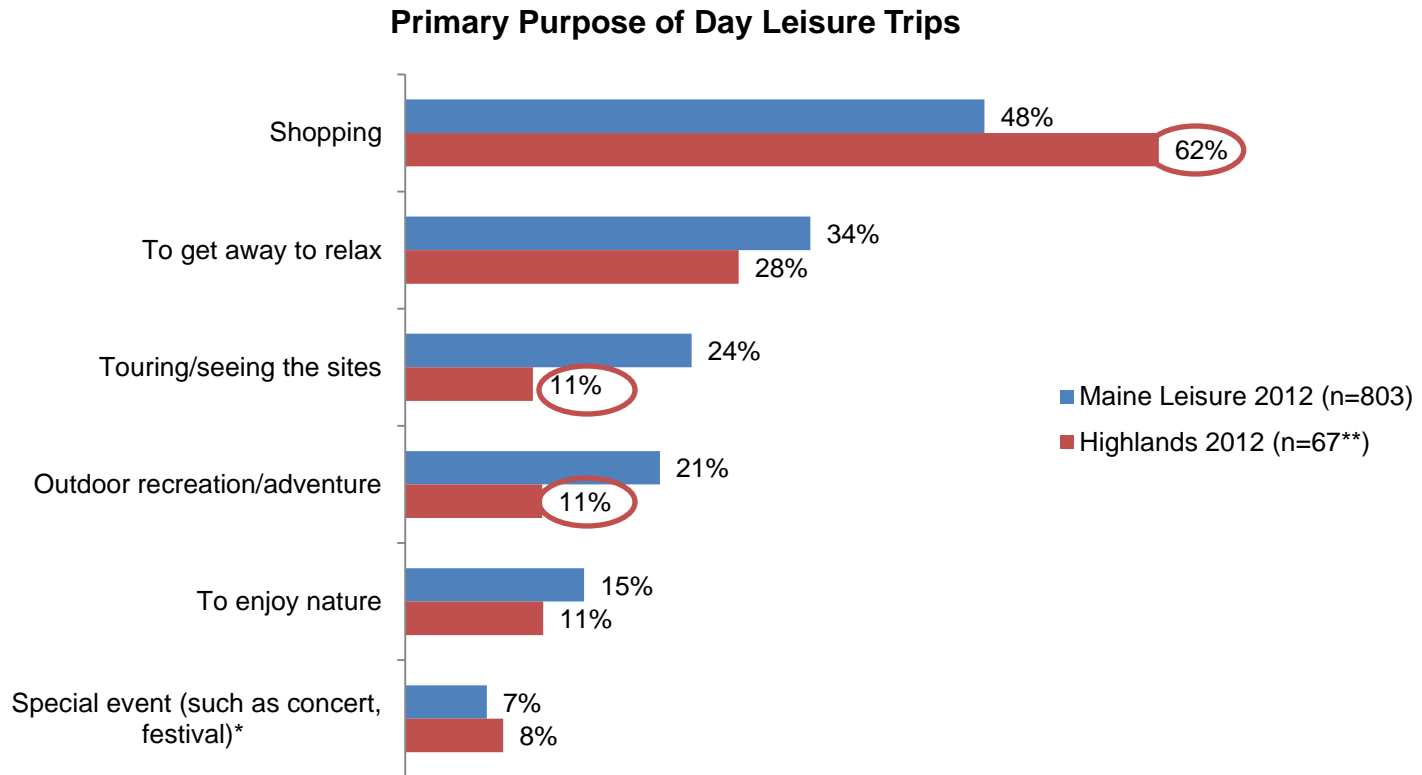
Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Day Leisure Visitors: *Trip Experience*



Primary Purpose of Day Leisure Trips

- As was the case with overnight leisure visitation to the Maine Highlands region, shopping was the key primary trip purpose for this region.



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.

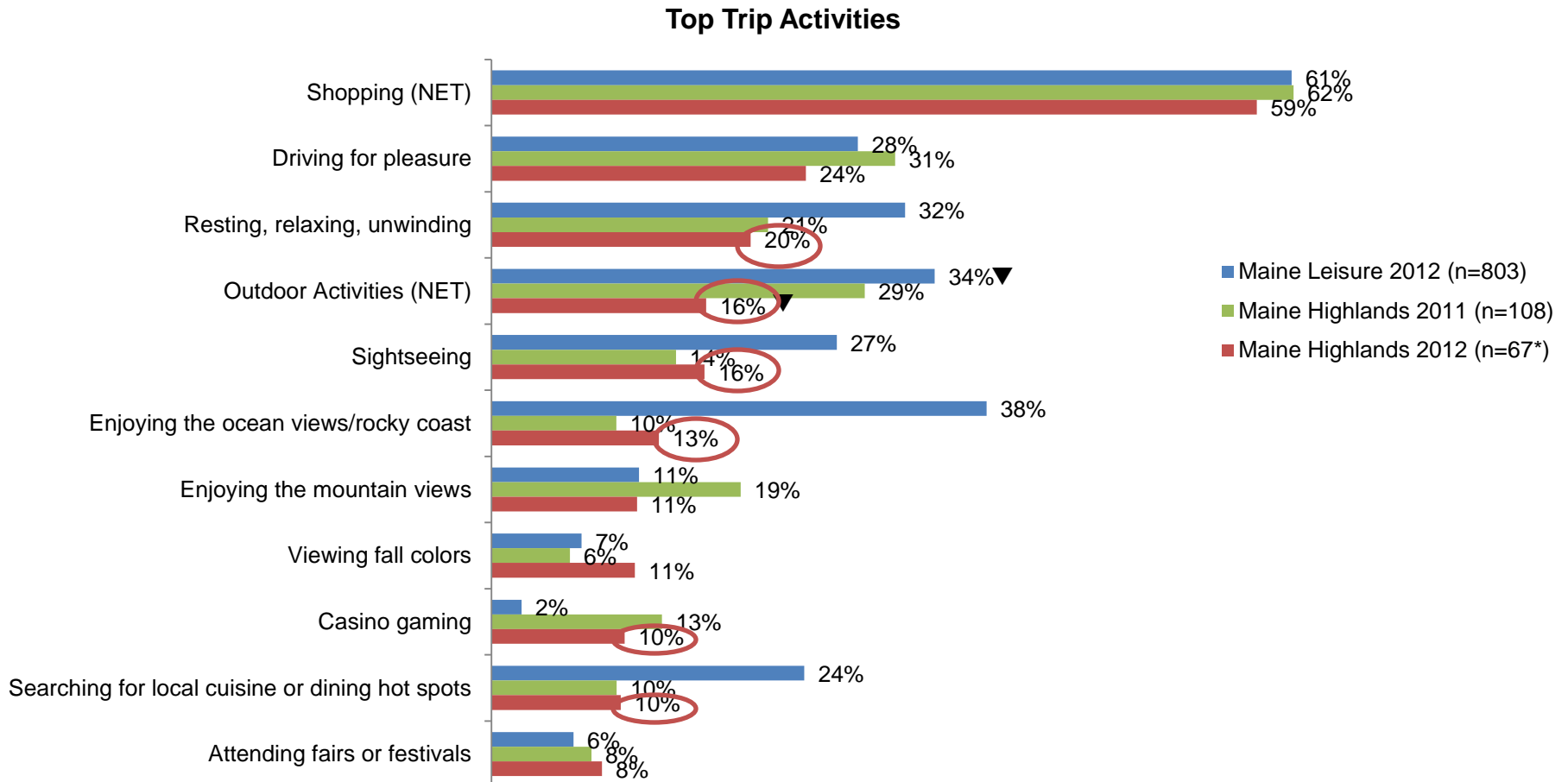
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Day Leisure Trip Activities

- *Shopping* was the most widely cited activity conducted by leisure day visitors to the Maine Highlands region, followed by *driving for pleasure* and *resting/relaxing/unwinding*.



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.

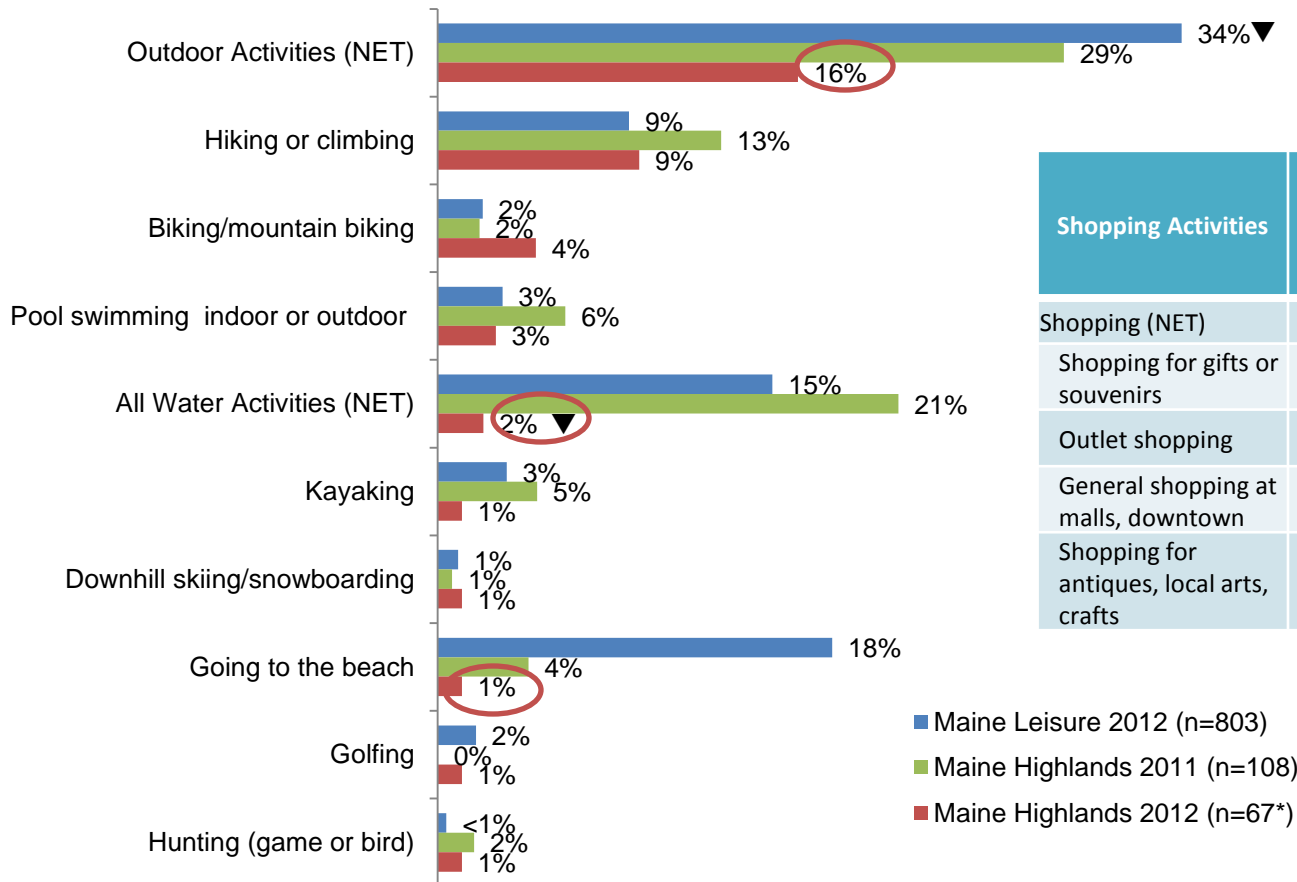
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Red circled figures highlight significant differences between visitors for this region and visitors to the State as a whole.

Day Leisure Outdoor Trip Activities

- The most popular outdoor activity among day leisure visitors to the Maine Highlands region is *hiking/climbing*.

Top Outdoor Activities



Shopping Activities	Maine Leisure 2012 (n=803)	Maine Highlands 2011 (n=108)	Maine Highlands 2012 (n=67*)
Shopping (NET)	61%	62%	59%
Shopping for gifts or souvenirs	18%	23%	21%
Outlet shopping	32%	21%	29%
General shopping at malls, downtown	26%	42%	31%
Shopping for antiques, local arts, crafts	15%	4%	6%

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

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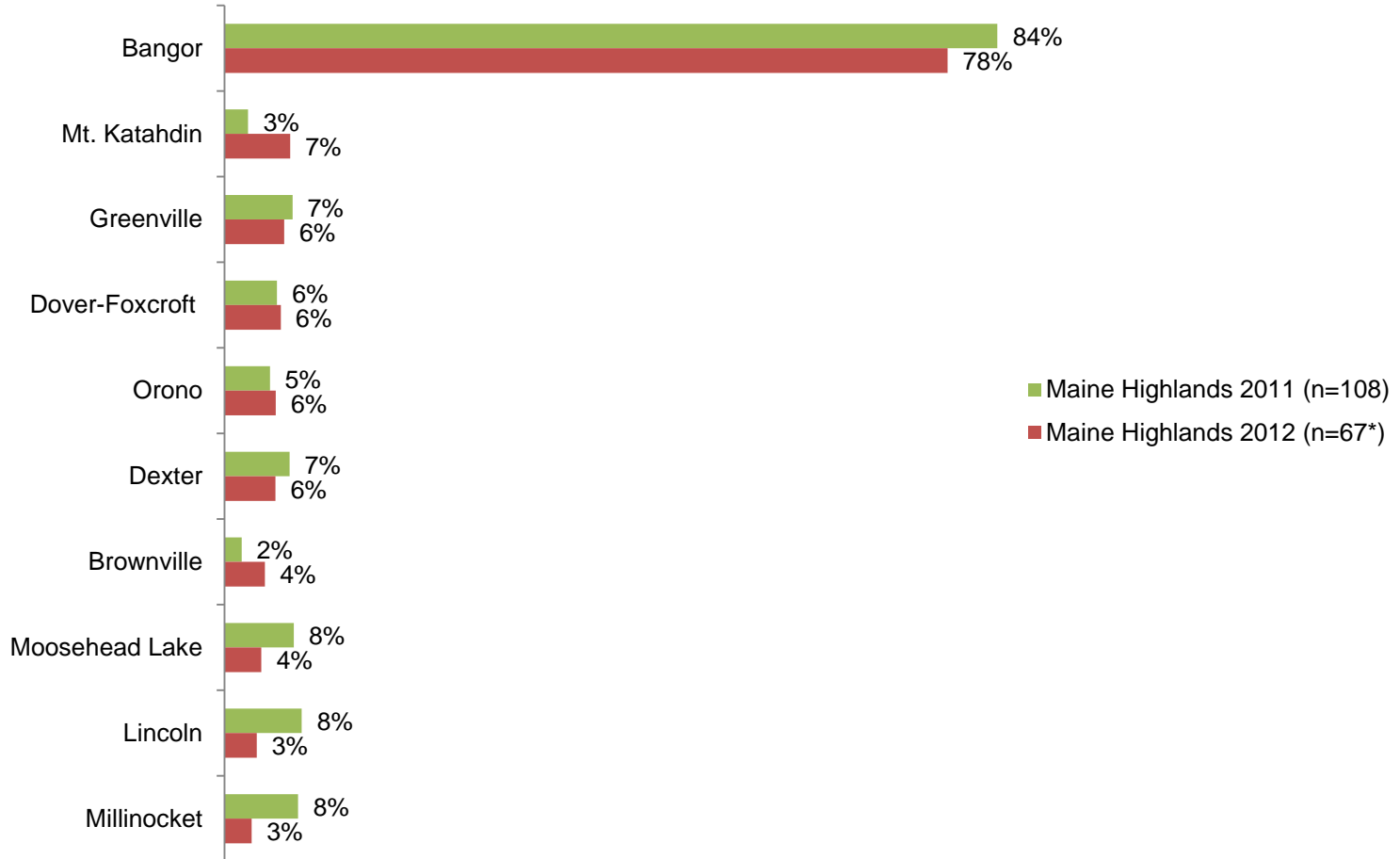
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Towns & Cities Visited

- Consistent with overnight leisure visitors to the Maine Highlands region, Bangor is the most popular stop among day leisure visitors, with three-fourths having visited this city.

Top Towns/Cities Visited



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

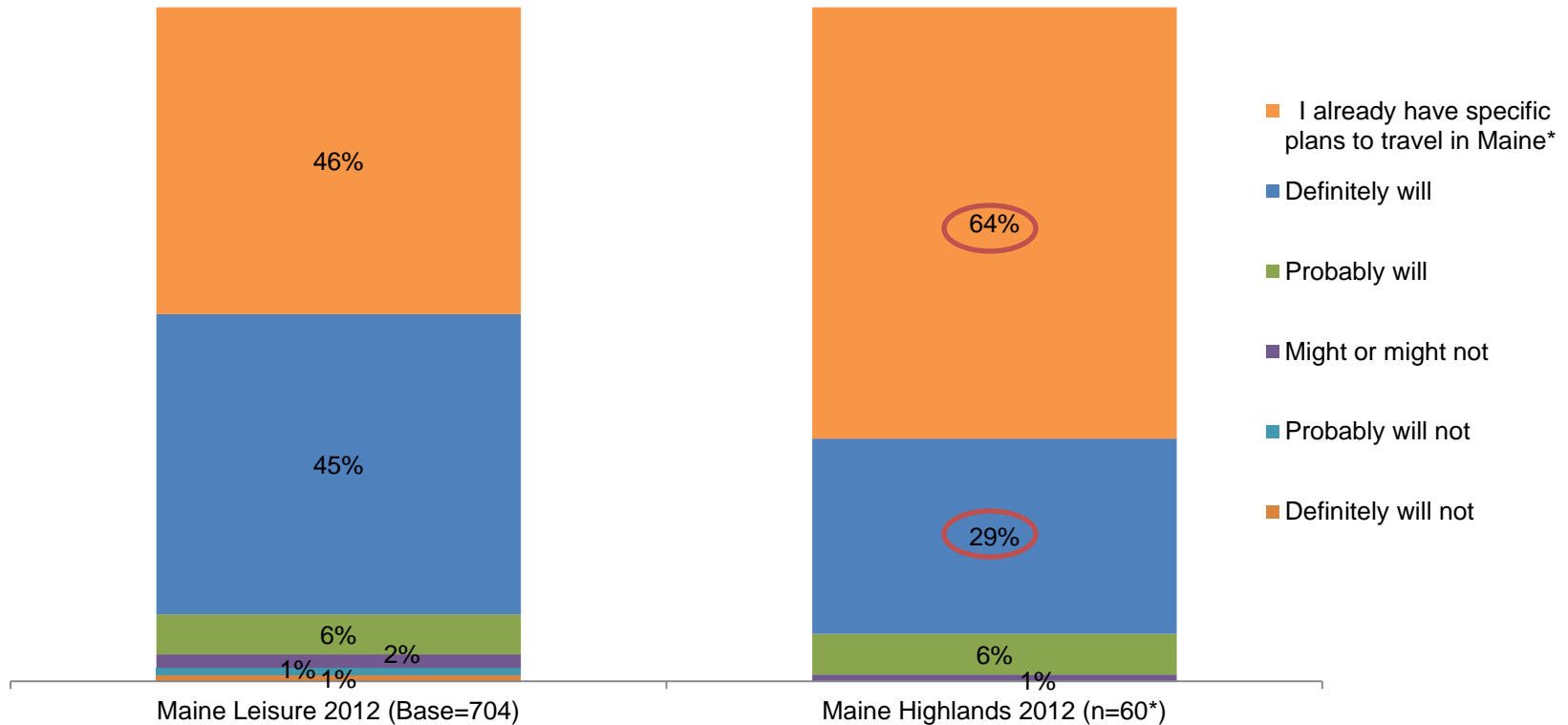
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Future Travel Likelihood

- Nine in ten day leisure visitors to the Maine Highlands region indicate that they will visit Maine again in the next two years. As compared with day leisure visitors to the rest of Maine, a greater proportion of day leisure visitors to this region report that they *already have specific plans* to come back to Maine.



Day Q19. 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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Comparison of *Maine Highlands* Visitors to Maine Visitors



Comparisons

- Visitors to the Maine Highlands region and visitors to the State of Maine as a whole differ in a few areas. These variations can be seen primarily in the average age and income of visitors, as well as their reasons for traveling and the activities they participate in while visiting.
- Popular trip activities and stated purpose of trips closely follow the shopping opportunities in the Maine Highlands region (Bangor).
- Highlights:
 - **Visitor Origin**
 - A **greater proportion** of overnight and day visitors from **New Brunswick**
 - A **lesser proportion** of overnight and day visitors from **Massachusetts**
 - A **greater proportion** of day visitors from **Maine**
 - A **lesser proportion** of overnight visitors from **New York** and **Quebec**
 - **Visitor Demographics**
 - A **lesser proportion** of overnight visitors **over the age of 55**, and a **lower average age of visitors**
 - A **lesser proportion** of overnight and day visitors **earning \$100,000 or more per year**, and a **lower average annual household income overall**
 - A **lesser proportion** of day visitors with a **college degree**

Comparisons Continued

- Highlights Continued:
 - **Primary Purpose of Trip**
 - Overnight and day visitors **more** likely to be **traveling for shopping**
 - Overnight visitors **less** likely to be visiting to:
 - Get away to relax
 - Enjoy nature
 - Tour/see the sites (day visitors also)
 - Participate in outdoor recreation (**day visitors also**)
 - **Trip Activities – Overnight and Day Visitors**
 - **Less** likely to be:
 - Resting/relaxing/unwinding
 - Participating in outdoor activities
 - Sightseeing
 - Enjoying the ocean views
 - Searching for local cuisine



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