

# Maine Office of Tourism Visitor Tracking Research 2013 Calendar Year Annual Report

## *Regional Insights: Maine Lakes and Mountains*

*Prepared by*



May 2014

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# Research Objectives and Methodology



# Research Objectives 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 2013, with travel occurring between January 2013 and December 2013. Data was collected between January 1st and December 15<sup>th</sup>, 2013. The number of completed statewide surveys collected for each research component are as follows:
  - Maine Overnight Visitor Survey – 2,675
  - Maine Day Visitor – 1,685
  - National Omnibus Survey – 17,591

# Research Objectives and Methodology

- The following report includes data on visitors to the Maine Lakes and Mountains tourism region.
  - 278 overnight visitors, and
  - 171 day visitors.
- Throughout this report, a significant increase from the previous year is indicated by **green** text, and a significant decrease from the previous year is indicated by **red** text.



# Overnight Visitors: *Traveler Description*



# Overnight Visitor Demographics

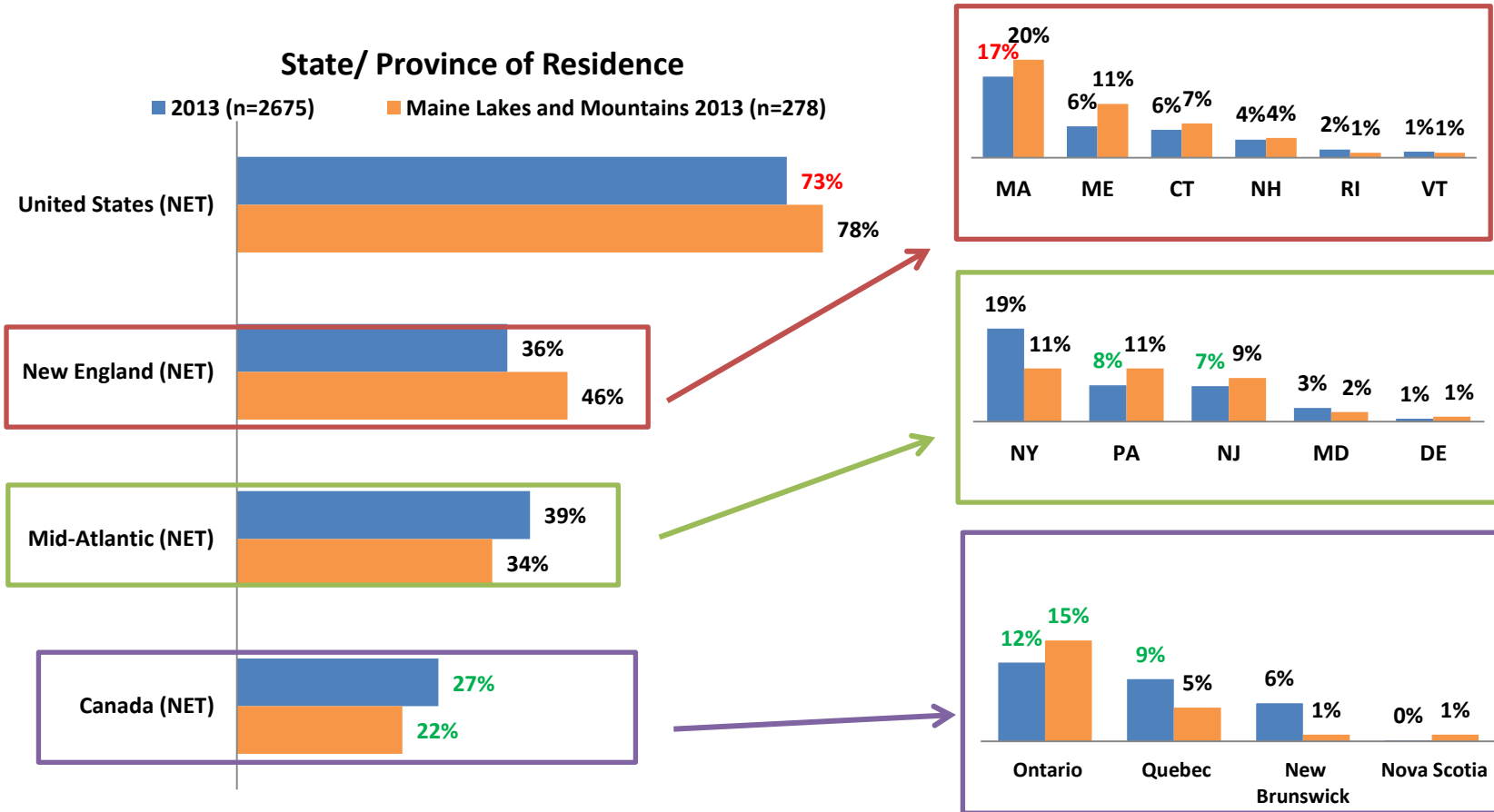
Overnight Visitors	Maine 2013 (n=2675)	Maine Lakes and Mountains 2013 (n=278)
Age:		
< 35	25%	<32%>
35 - 44	17%	22%
45 - 54	22%	18%
55 +	<35%>	27%
Mean Age (Years)	47.1	43.6
Income:		
< \$50,000	11%	13%
\$50,000 - \$99,000	33%	31%
\$100,000 +	45%	49%
Mean Income (Thousands)	\$115,427	\$124,600
Female	47%	53%
College Degree or Higher	81%	80%
Married	60%	60%
Employed Full Time	68%	<74%>

<> indicates a significant difference between subgroups at the 95% confidence level.

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

# Nearly half of overnight visitors to the Maine Lakes & Mountains region come from New England.

- Massachusetts sends the greatest proportion of overnight visitors to this region, followed by Ontario, New York, and Maine.
- The proportion of overnight visitors arriving from Canada has increased over 2012.



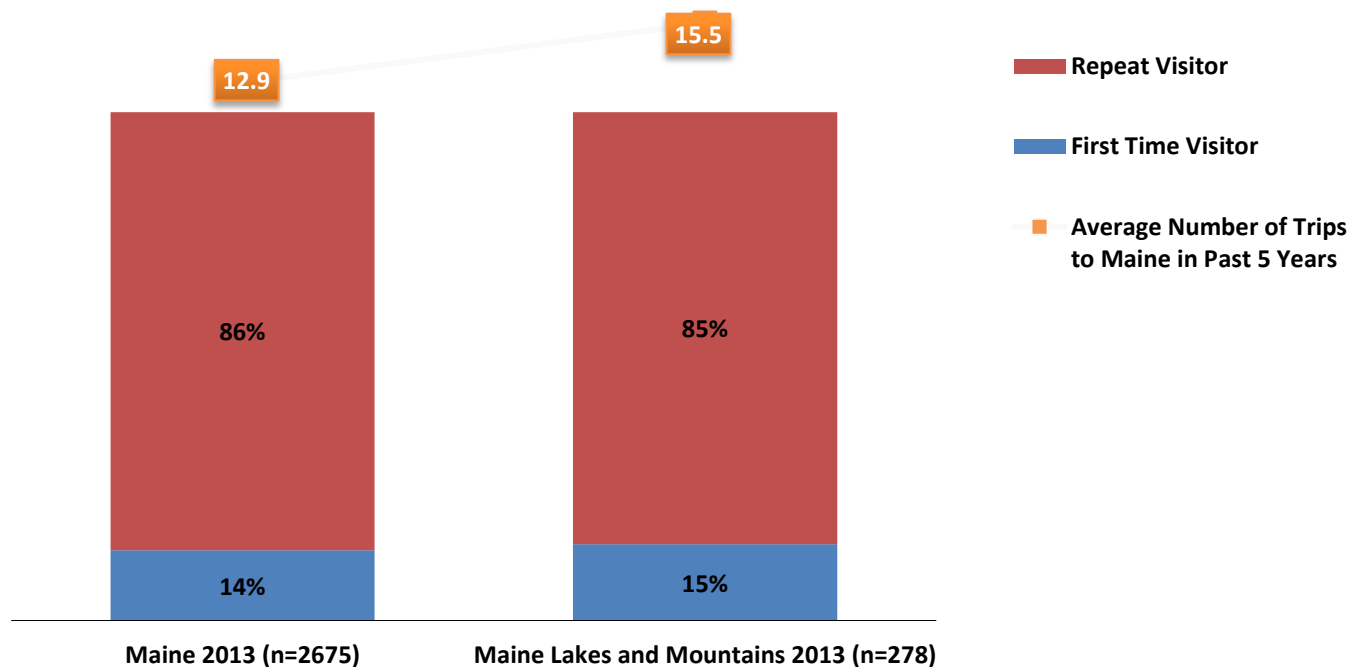
State/ Province of Residence

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



# The Maine Lakes & Mountains region attracts a high proportion of repeat visitors, much like the rest of the State.

## Repeat vs. First Time Visitors



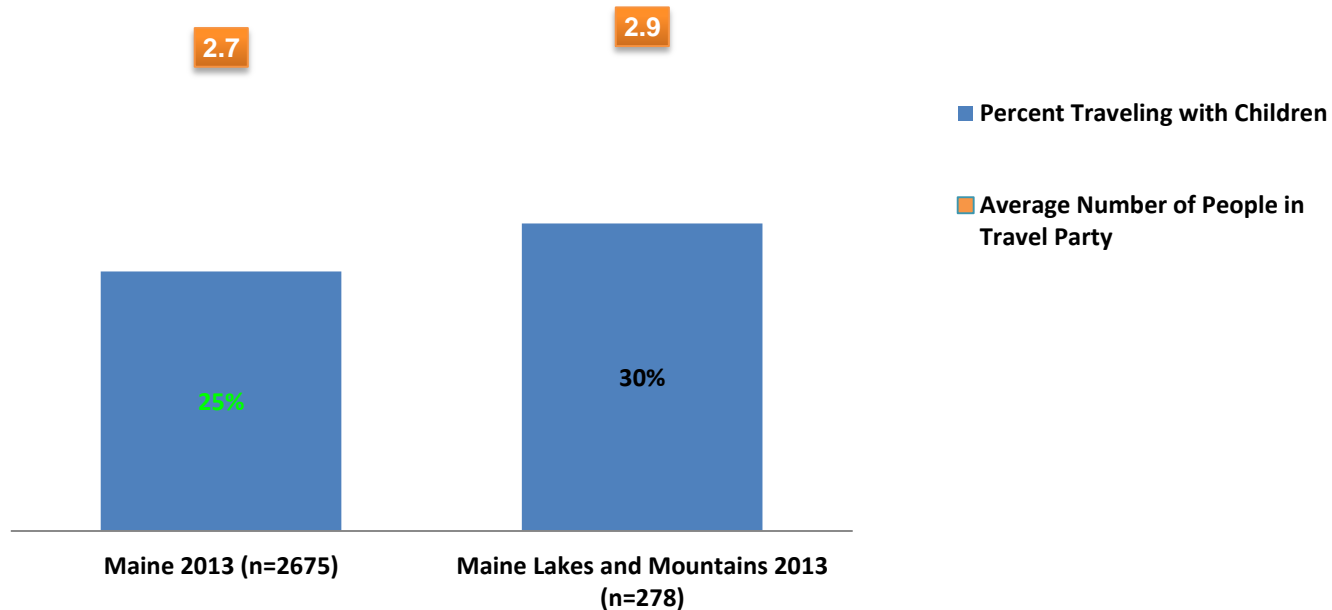
Regional Q9. Was this your first visit in Maine?

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

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

# Almost one-third of overnight visitors to this region travel with children, and average party size is nearly three.

## Travel Party Composition



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?

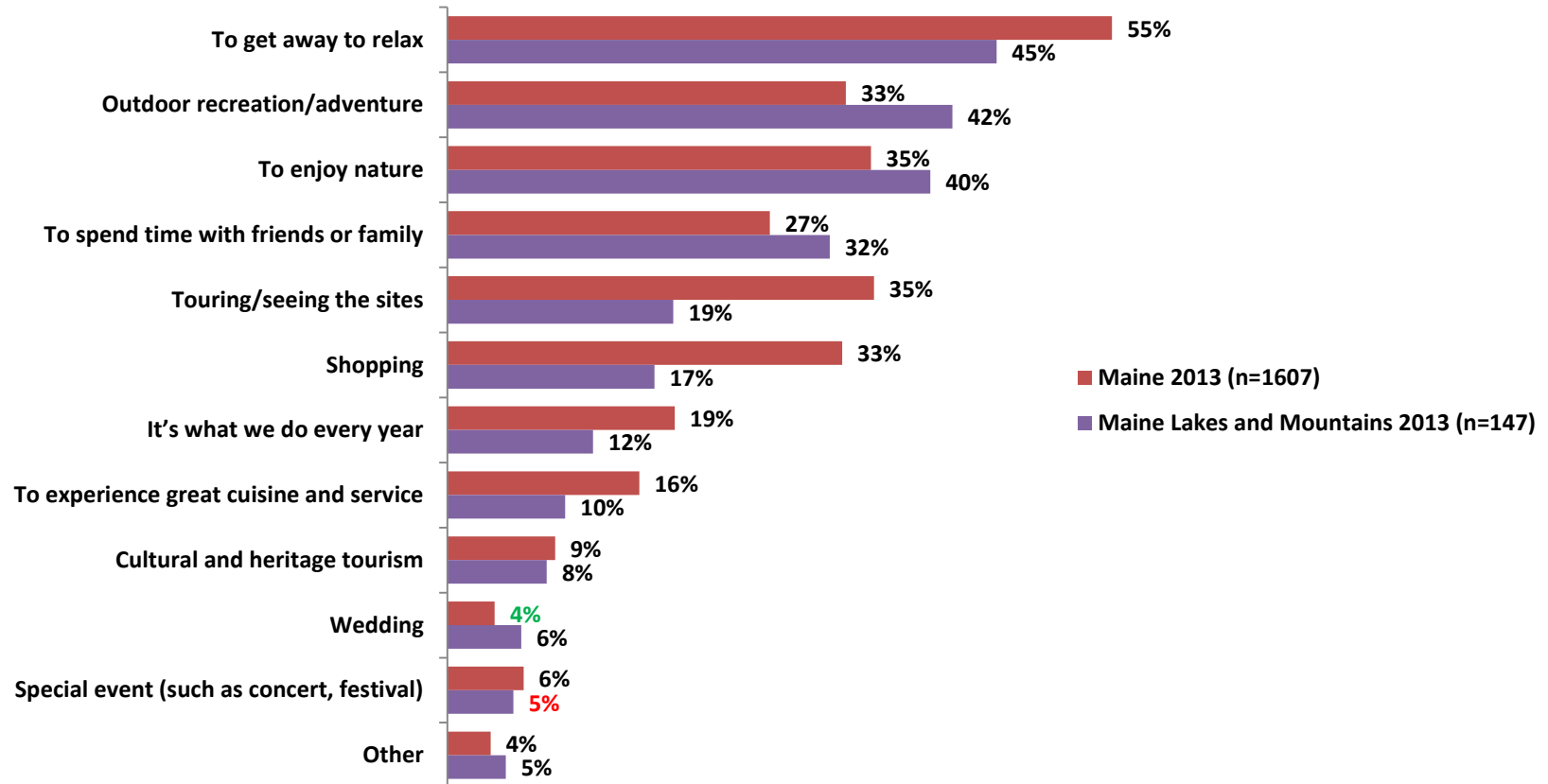
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight Visitors: *Trip Experience*



# Getting away to relax and outdoor recreation are the most commonly cited purposes for traveling to this region.

Primary Purpose of Overnight Leisure Trips

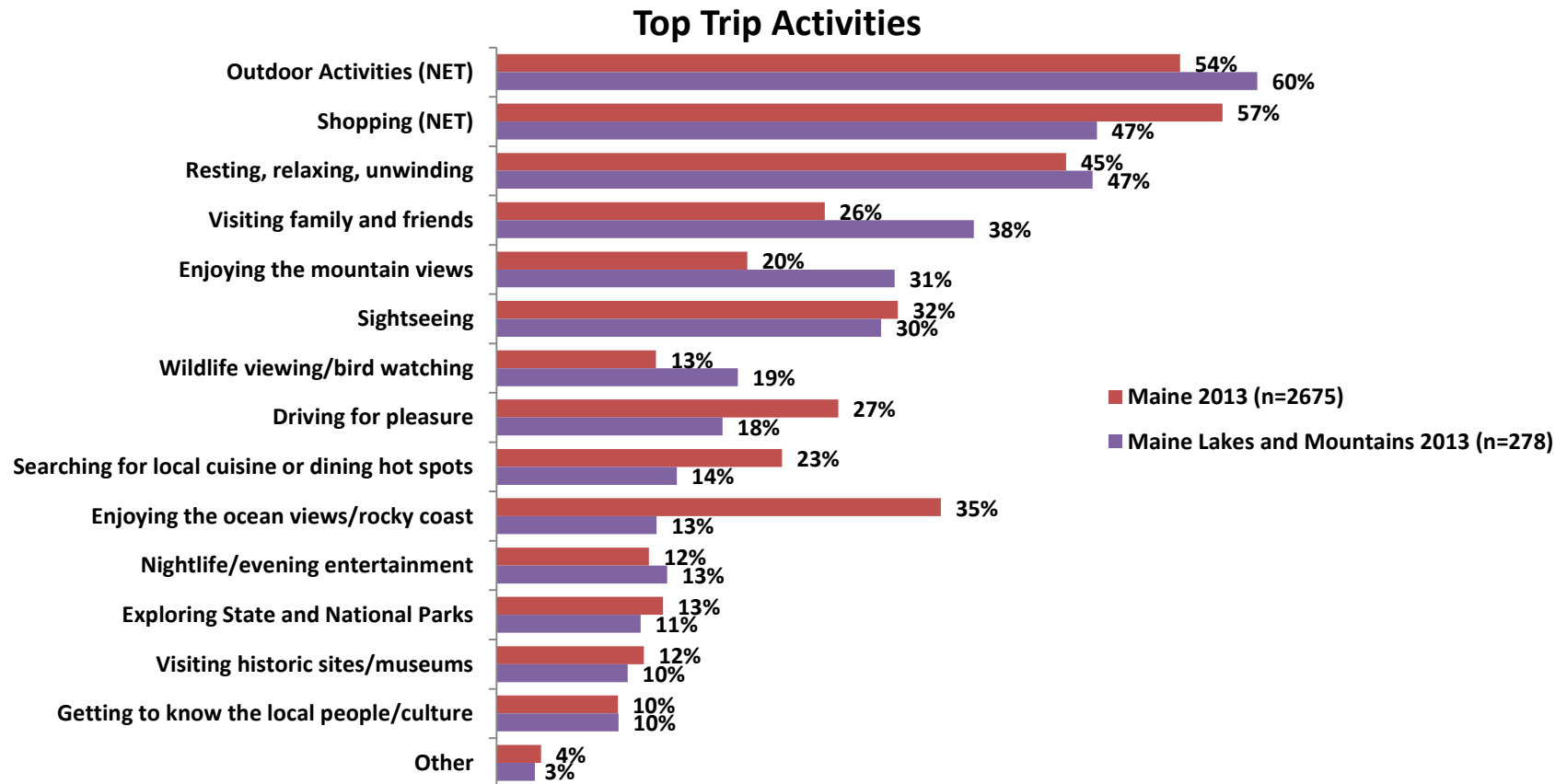


Regional Q7. What was the primary purpose of your most recent trip in Maine?

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

# Overnight visitors to this region were most likely to participate in various outdoor activities.

- Outdoor activities, visiting family/friends, and enjoying the mountain views were more popular activities in the Maine Lakes & Mountains than in the State of Maine as a whole.



Regional Q32. In which of the following activities did you participate during this trip? (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.

# Shopping in the Maine Lakes & Mountains region was evenly split among the different types of shopping.

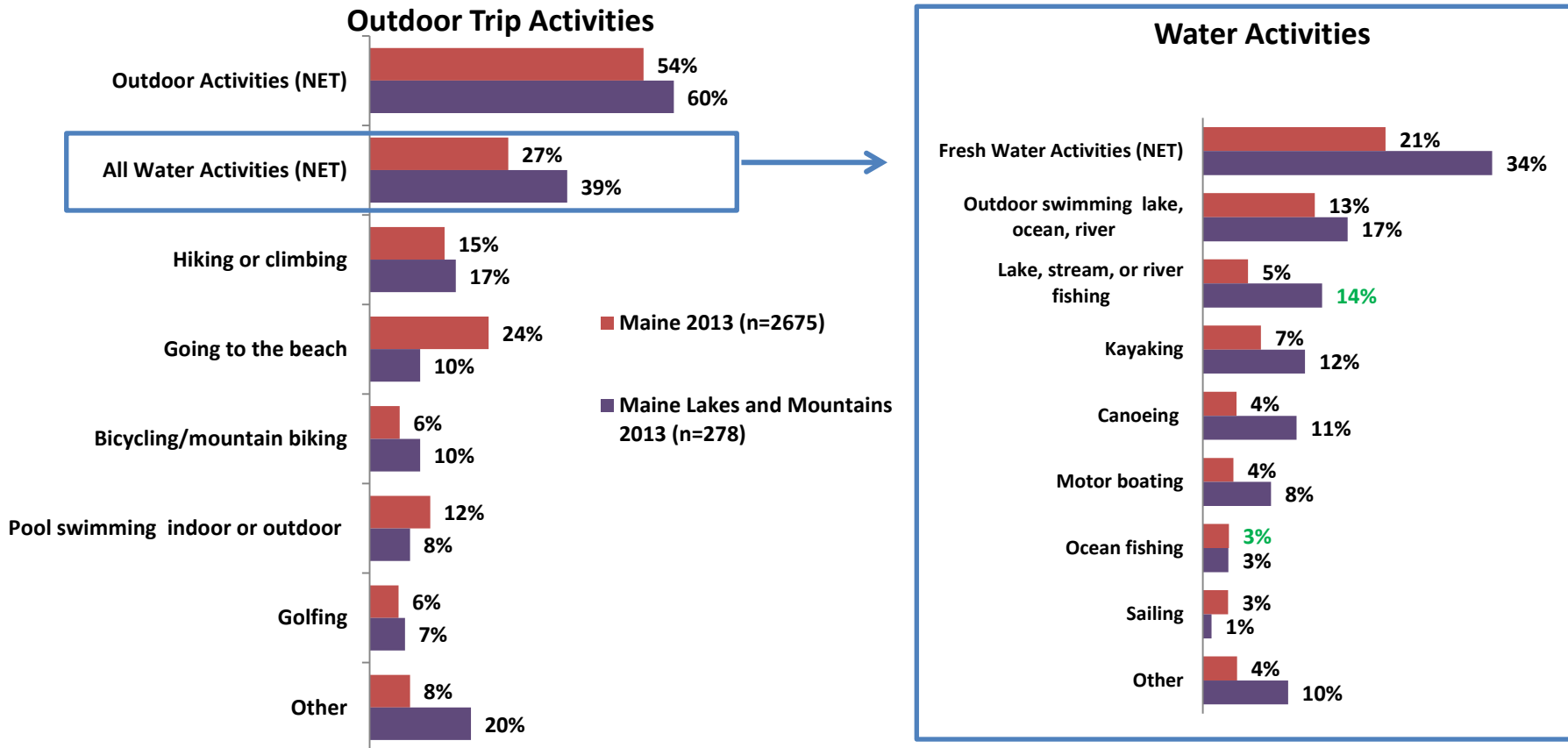


Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

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

# Outdoor activities in the Maine Lakes & Mountains region were mostly water activities.

- Fresh water activities, fishing, and canoeing were all more popular in this region than in the State of Maine as a whole.

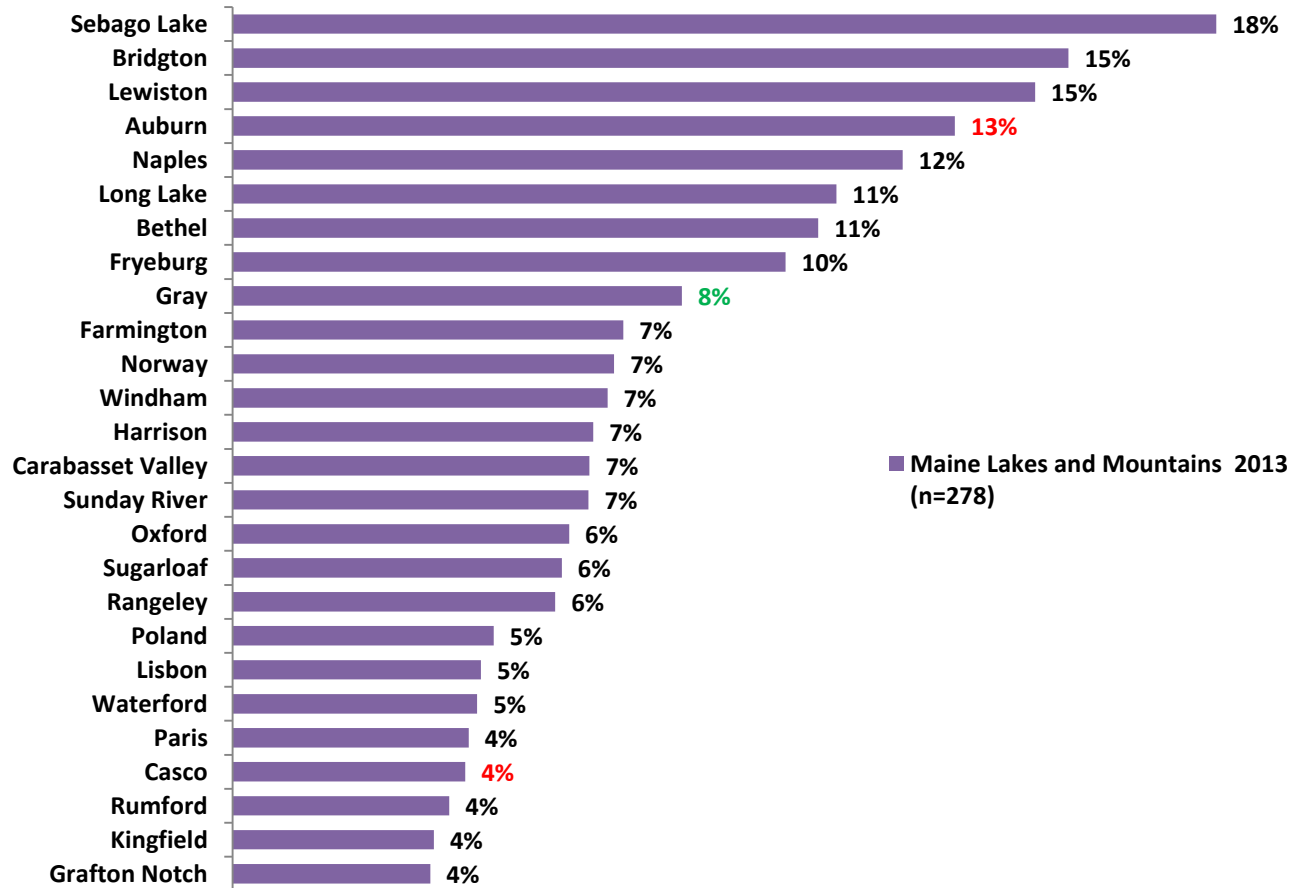


Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

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

# Sebago Lake, Bridgton, and Lewiston were the top towns/cities visited in the Maine Lakes & Mountains region.

Top Towns/Cities Visited



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

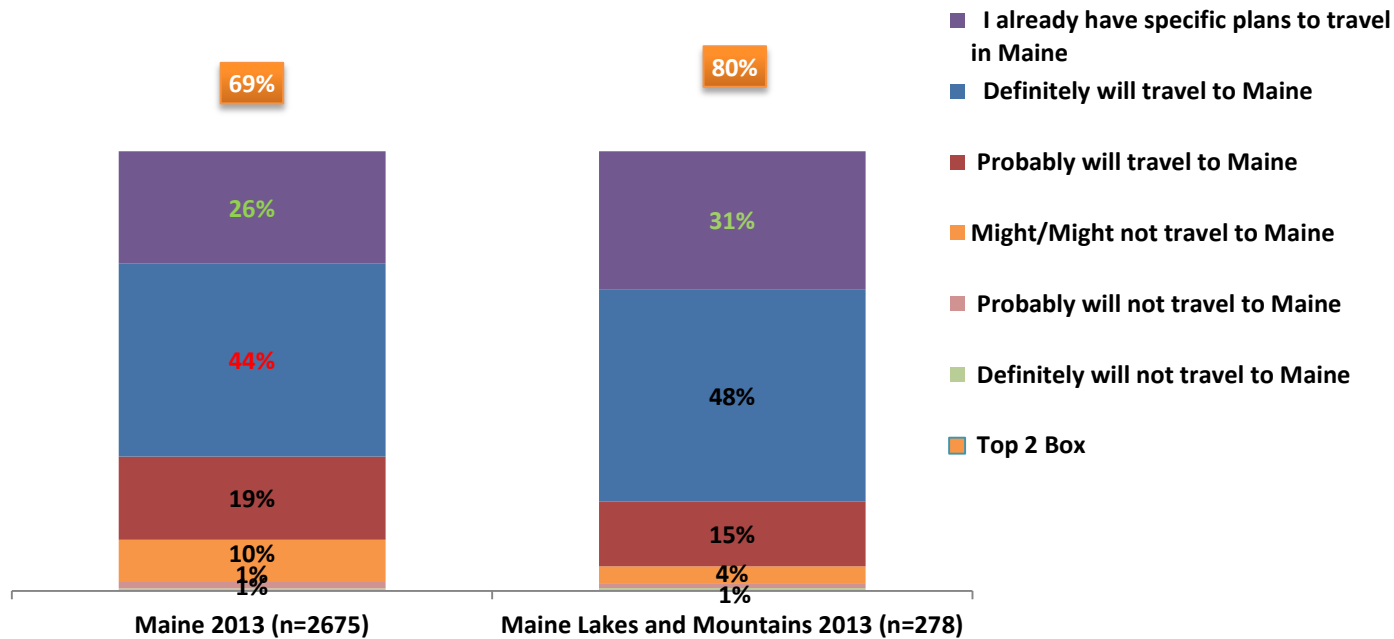
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



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

- One-third already have specific plans to travel in Maine again in the future.
- The proportion claiming that they already have specific travel plans or definitely will travel to Maine in the future is greater among overnight visitors to the Maine Lakes & Mountains region than for the State of Maine as a whole.

## Future Travel Likelihood



Regional Q37. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

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

# Day Visitors: *Traveler Description*



# Day Visitor Demographics

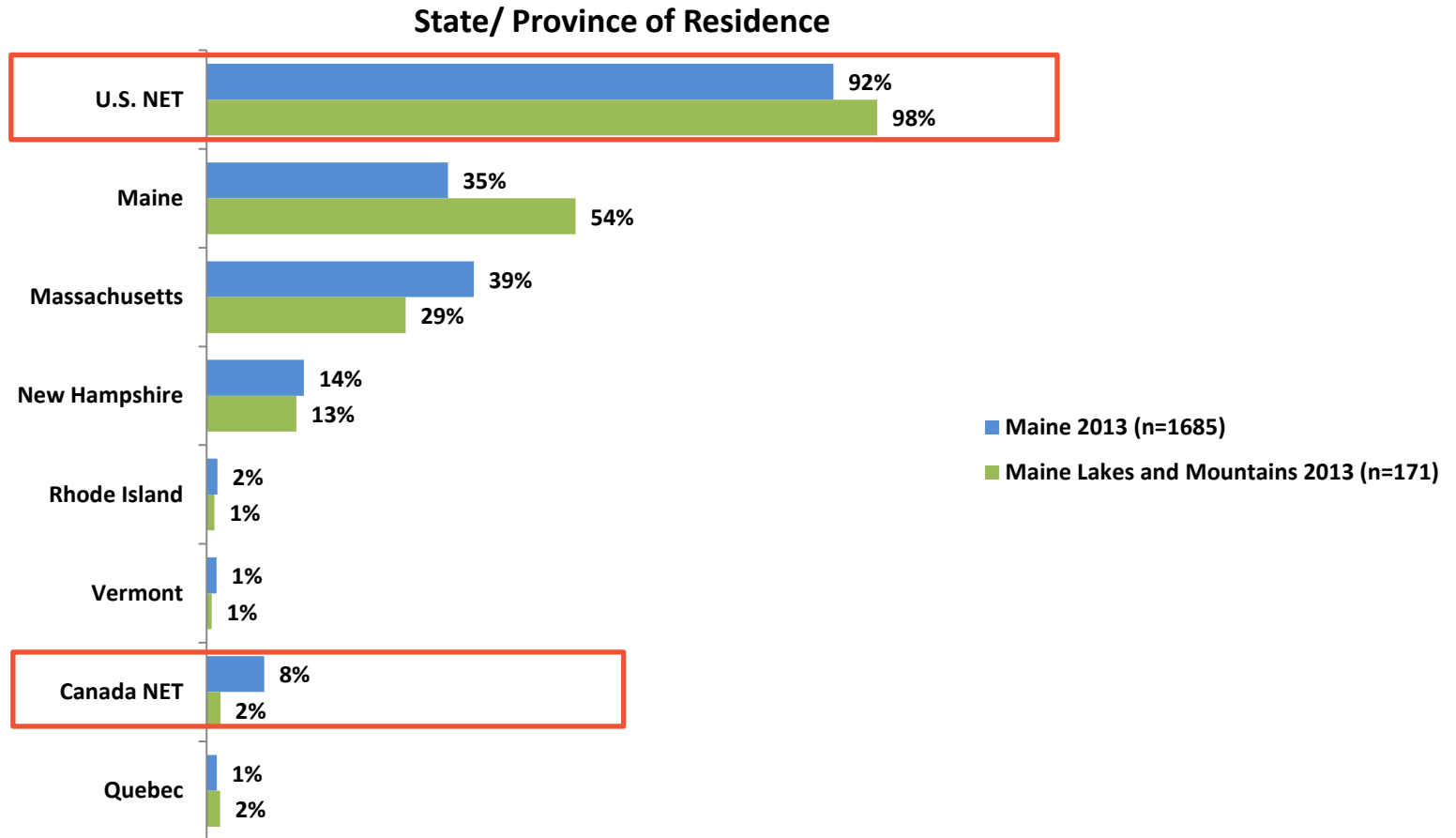
Day Visitors	Maine 2013 (n=1685)	Maine Lakes and Mountains 2013 (n=171)
Age:		
< 35	<b>20%</b>	22%
35 - 44	15%	17%
45 - 54	25%	<b>28%</b>
55 +	40%	33%
Mean Age (Years)	<b>49.0</b>	47.8
Income:		
< \$50,000	19%	20%
\$50,000 - \$99,000	42%	42%
\$100,000 +	38%	39%
Mean Income (Thousands)	\$98,010	\$97,920
Female	<b>54%</b>	<b>56%</b>
College Degree or Higher	71%	75%
Married	66%	70%
Employed Full Time	63%	66%

<> indicates a significant difference between subgroups at the 95% confidence level.

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

# Nearly all day visitors to the Maine Lakes & Mountains region are US visitors.

- Half of the day visitors to this region are in-state visitors, and one-fourth are from Massachusetts.

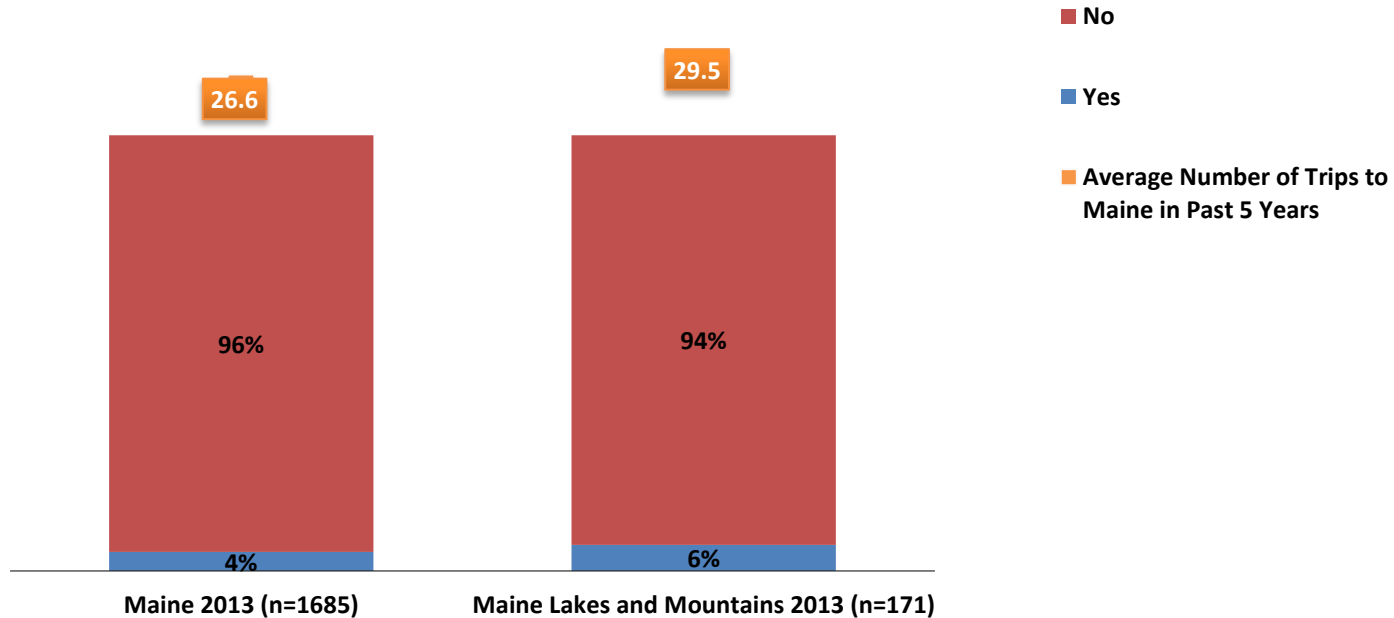


Day Q1A. In what State or Province do you reside?

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

# The Maine Lakes & Mountains region enjoys a very loyal day visitor base, with 94% being repeat visitors.

## Repeat vs. First Time Visitors



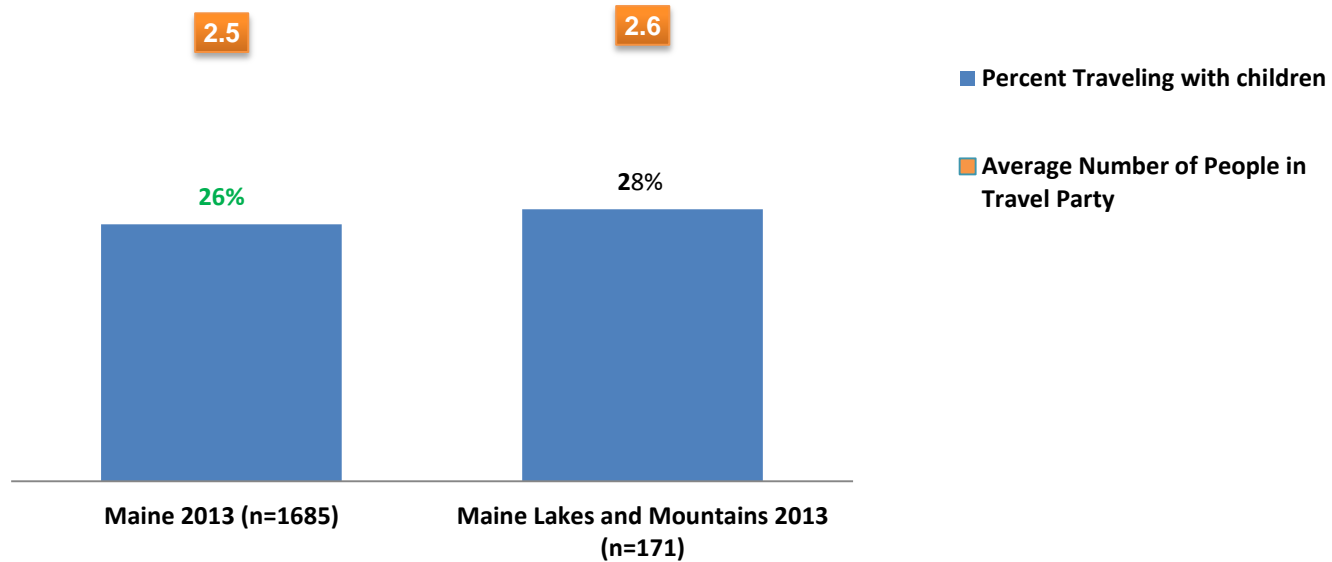
Day Q4. Was this your first trip to Maine?

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

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

# One in four day visitors to the Maine Lakes & Mountains region are traveling with children.

## Travel Party Composition



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

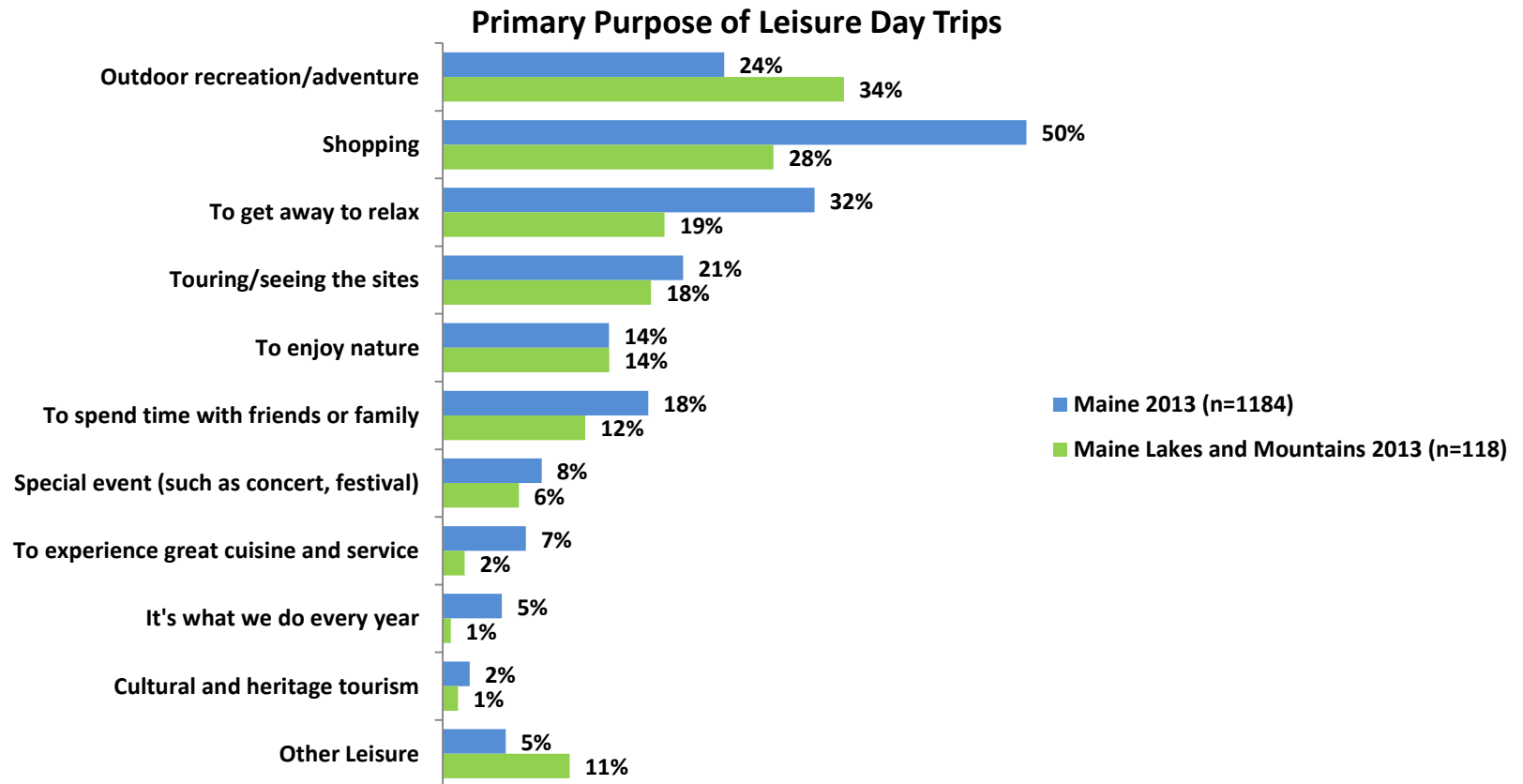
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day Visitors: *Trip Experience*



# Outdoor recreation is the top mentioned primary purpose of a day trip to the Maine Lakes & Mountains region.

- Shopping and getting away to relax are less frequently mentioned as the primary purpose of their day trip by visitors to this region than by visitors to the State of Maine as a whole. Outdoor recreation, on the other hand, is more frequently mentioned.



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

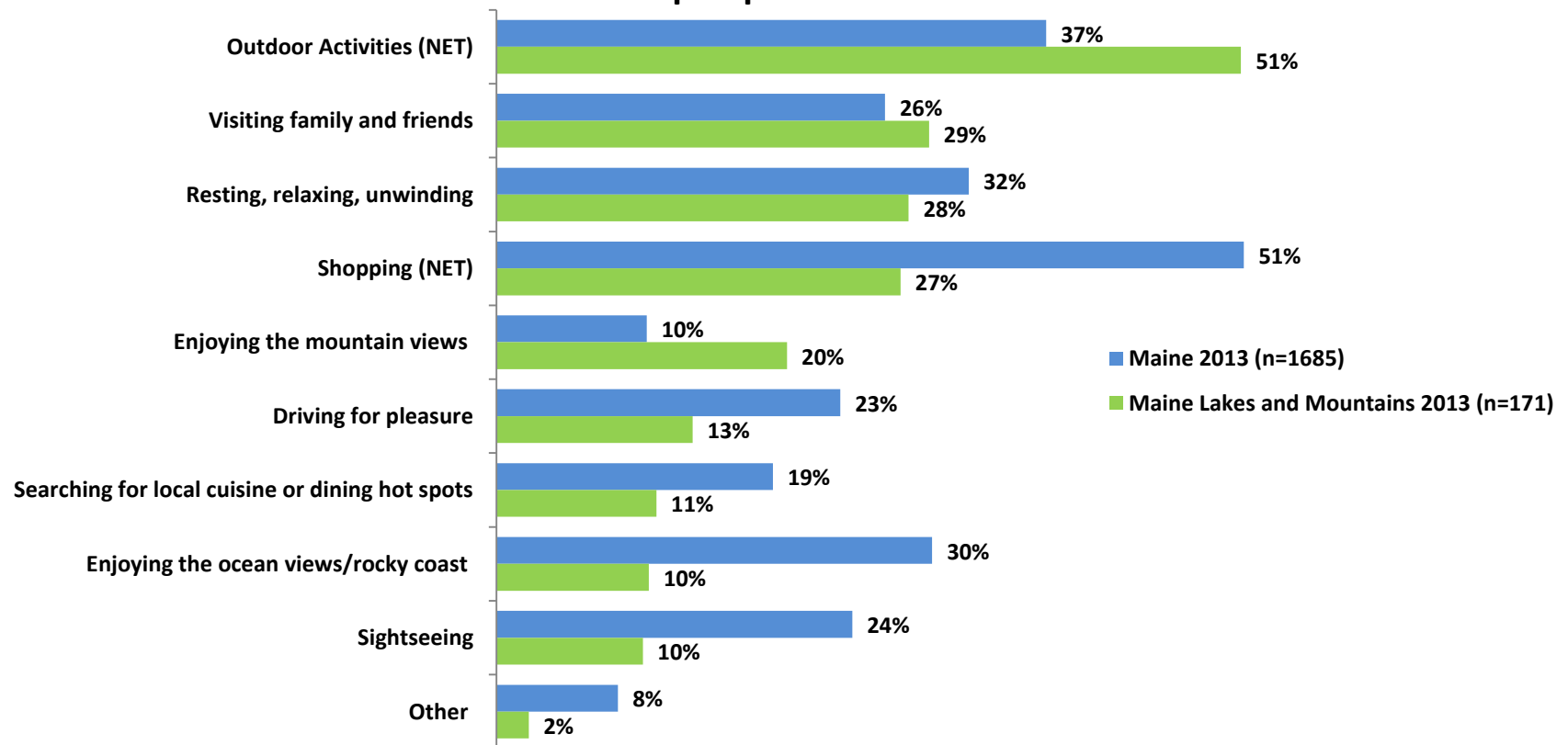
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# Half of day visitors to the Maine Lakes & Mountains participated in various outdoor activities while visiting.

- Outdoor activities and enjoying the mountain views were more frequently mentioned among day visitors to this region than among visitors to the State of Maine as a whole.
- Shopping, enjoying the ocean views, sightseeing, and driving for pleasure were *less* frequently mentioned among day visitors to the Maine Lakes & Mountains region.

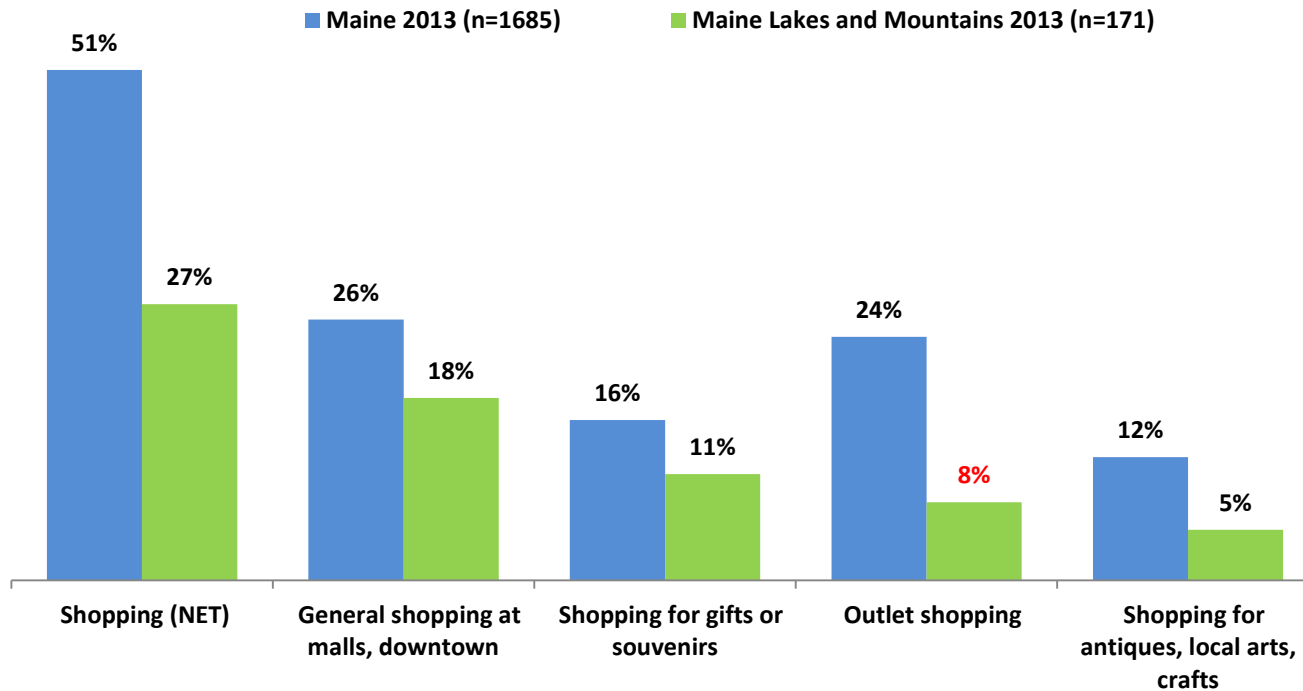
**Top Trip Activities**



Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).  
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Shopping activities mostly included general mall/downtown shopping.

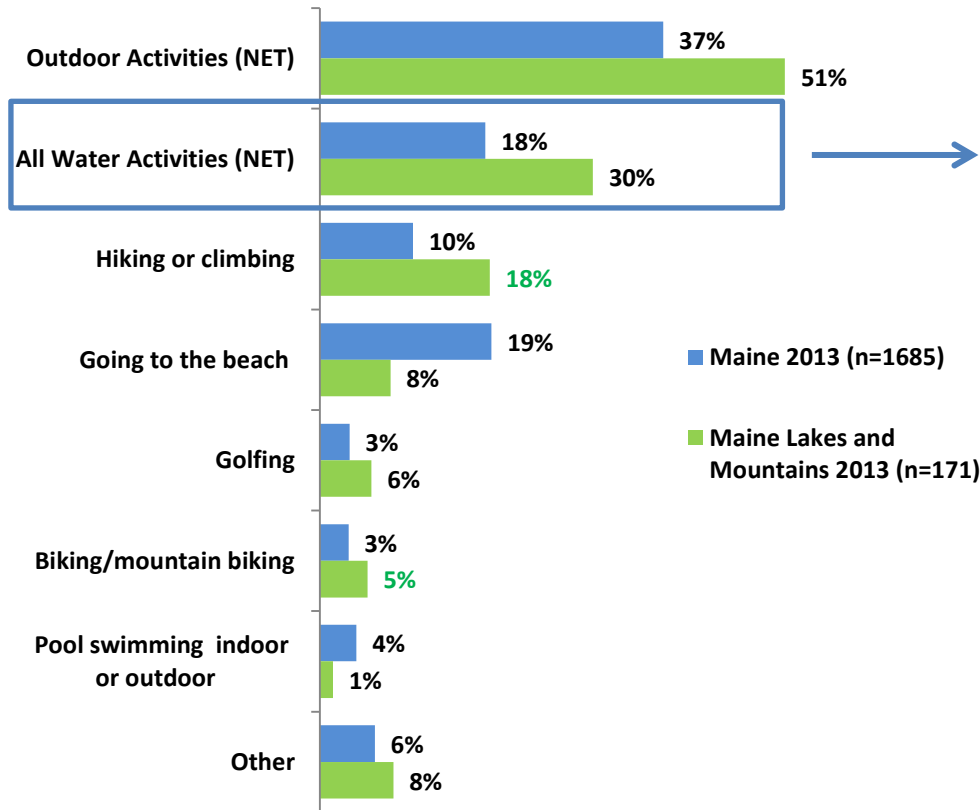
## Shopping Activities



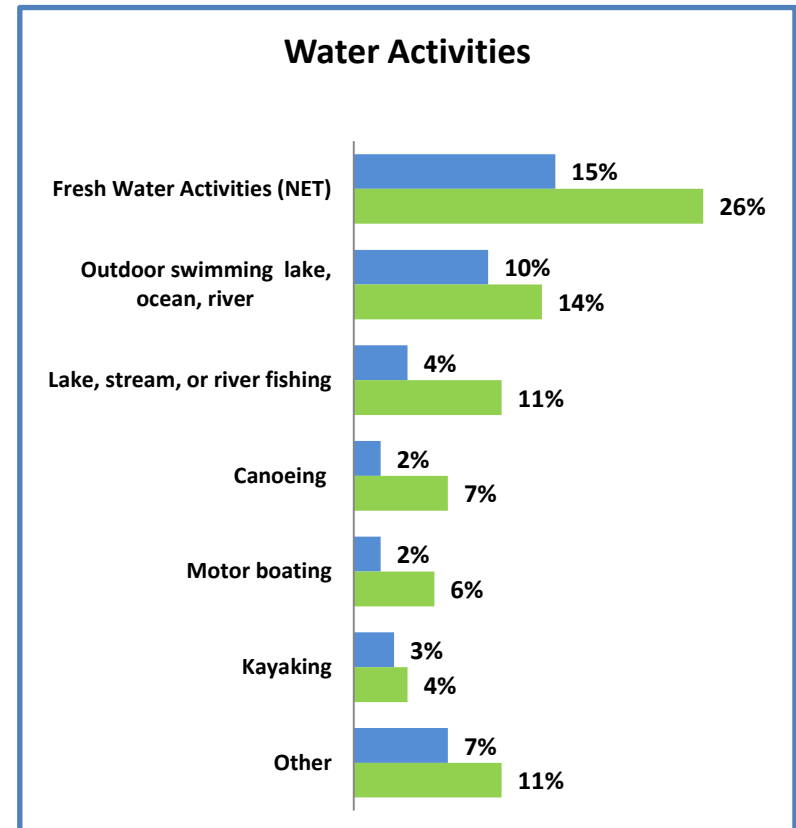
Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).  
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Outdoor activities in the Maine Lakes & Mountains region mostly included water activities and hiking/climbing.

## Outdoor Activities



## Water Activities

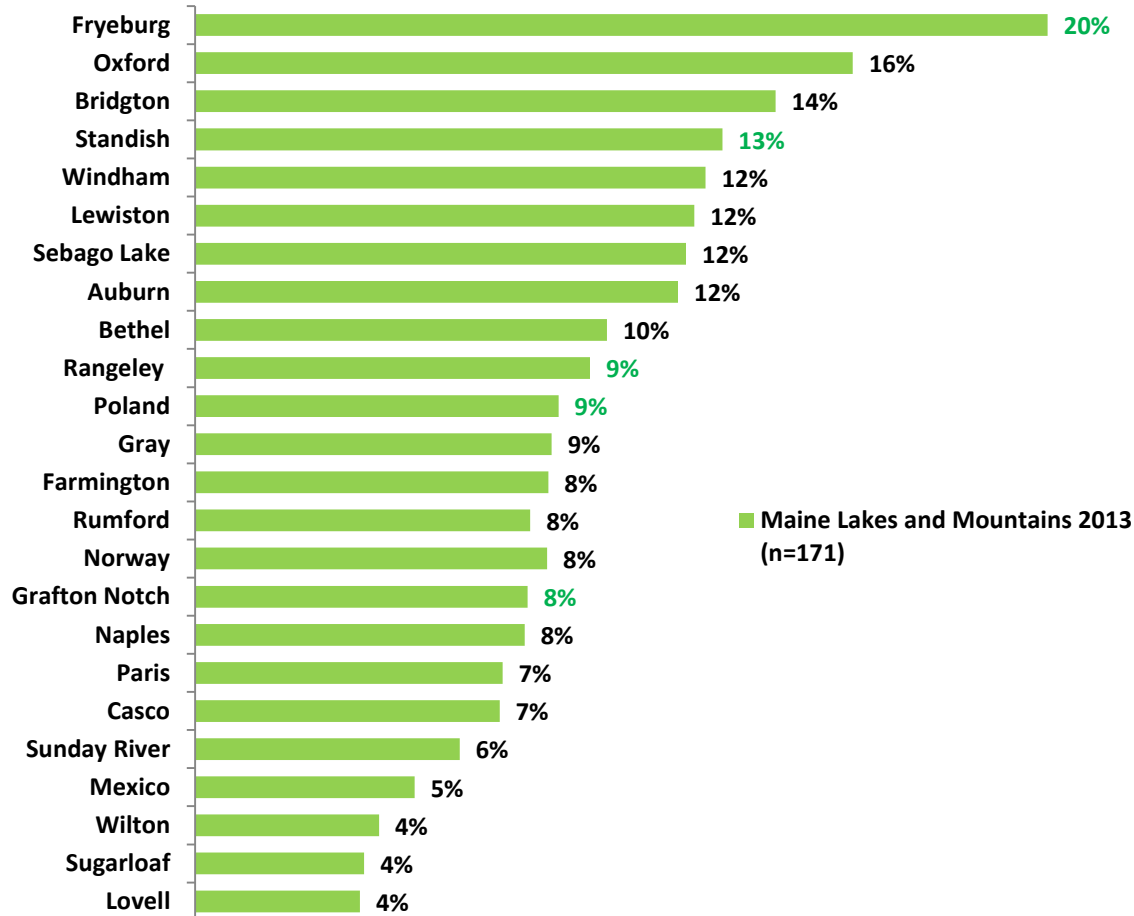


Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).  
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Fryeburg is the most frequently visited town among day visitors to the Maine Lakes & Mountains region.

- Fryeburg, Standish, Rangeley, Poland, and Grafton Notch all welcomed greater proportions of day visitors in this region as compared to 2012.

## Top Towns/Cities Visited

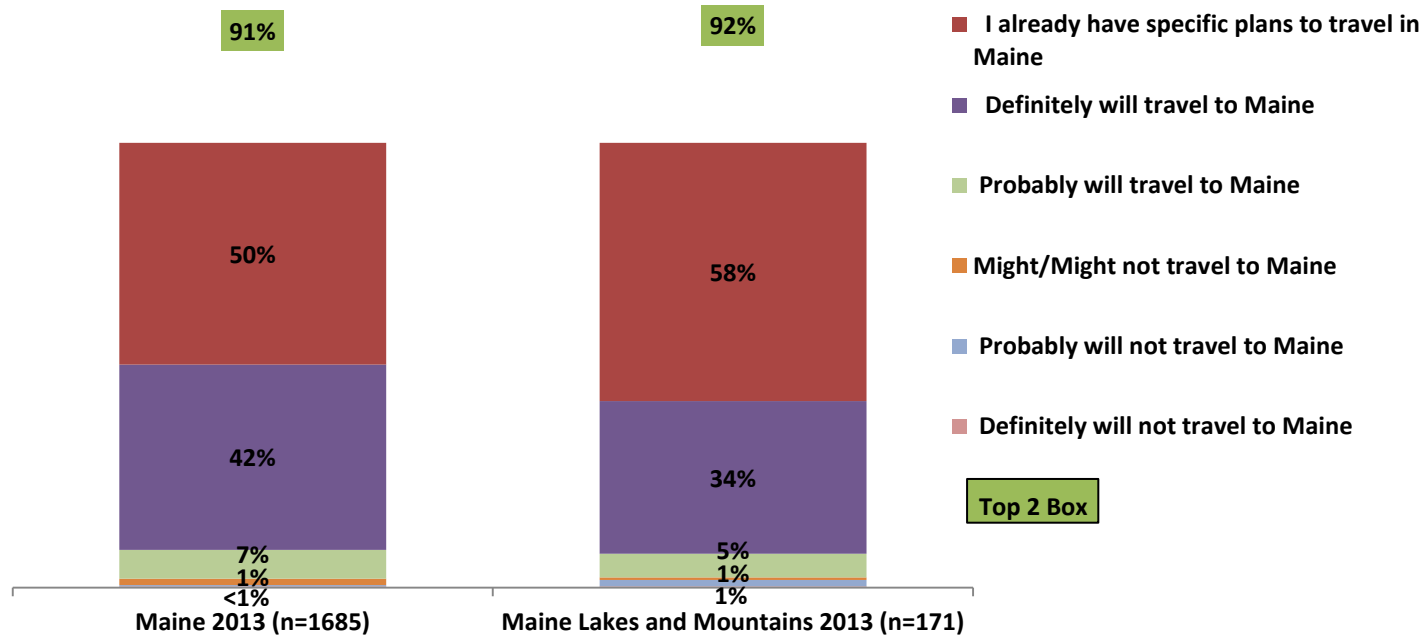


Day Q12: Within the region you visited, what specific towns or cities did you visit?

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

# Nine in ten day visitors to this area plan to visit Maine again in the future.

## Future Likelihood to Travel to Maine



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

<>, and/or a/b/c/etc. indicates a significant difference between subgroups at the 95% confidence level.

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

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



# 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, as well as where they are coming from.
- Popular trip activities and stated purpose of trips closely follow the outdoor and nature-oriented environment available in the Lakes and Mountains region.
- Highlights:
  - **Visitor Origin**
    - **A greater proportion** of overnight and day visitors from **Maine**.
    - **A lesser proportion** of overnight visitors from **New York, Quebec, and New Brunswick**.
    - **A lesser proportion** of day visitors from **Massachusetts**.
  - **Visitor Demographics**
    - Overnight visitors **more** likely to be **under the age of 35** and **less** likely to be **55 years of age or older**.
    - **A greater proportion** of overnight visitors who are employed full-time.

# Comparisons

- Highlights Continued:
  - **Primary Purpose of Trip**
    - Overnight and day visitors **more** likely to be traveling for **outdoor recreation**.
    - Overnight visitors **less** likely to be visiting to **tour/see the sites**.
    - Overnight and day visitors **less** likely to be visiting to:
      - Get away to relax
      - Shop
      - Experience great cuisine
      - Because it's what they do every year
  - **Trip Activities – Overnight and Day Visitors**
    - **More** likely to be:
      - Enjoying the mountain views
      - Participating in various water activities and specifically, fresh water activities
      - Fishing
      - Motor boating
      - Canoeing
    - **Less** likely to be:
      - Shopping
      - Enjoying the ocean views
      - Driving for pleasure
      - Searching for local cuisine
      - Outlet shopping
      - Going to the beach
      - Pool swimming



# Comparisons

- Highlights Continued:
  - **Trip Activities – Day Visitors**
    - **More likely to be:**
      - Participating in various outdoor activities
      - Hiking/Climbing
    - **Less likely to be:**
      - Sightseeing
      - General mall/downtown shopping
      - Antique/local craft shopping
  - **Trip Activities – Overnight Visitors**
    - **More likely to be:**
      - Spending time with family and friends
      - Wildlife viewing/bird watching
      - Biking
      - Kayaking
    - **Less likely to be:**
      - Gift/souvenir shopping
  - **Future Travel Likelihood**
    - Overnight and day visitors **more** likely to indicate that they will travel to Maine again.



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