

Maine Office of Tourism Visitor Tracking Research 2014 Calendar Year Annual Report

Regional Insights: Kennebec & Moose River Valley

Prepared by



May 2015

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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 two national online panels – Research Now and Instantly (formerly Usamp).
- Information is gathered on an ongoing basis through three surveys:
 - **Maine Overnight Visitor Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada
 - Have taken an overnight trip to Maine in the past four weeks
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine’s borders
 - 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
 - To determine the incidence of travel nationwide and Maine’s share of that travel
- Survey results were collected during calendar year 2014 for travel to Maine occurring from December 2013 through November 2014. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,930
 - Maine Day Visitor – 1,733
 - National Omnibus Survey – 17,675

Research Objectives and Methodology

- The following report summarizes results among visitors to the Kennebec & Moose River Valley tourism region during 2014, including:
 - 183 overnight visitors, and
 - 111 day visitors.
- Throughout this report, data for the Kennebec & Moose River Valley 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 < >.
- Statistically significant differences between 2013 and 2014 are also highlighted for both the Kennebec & Moose River Valley 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*



Overnight Visitor Demographics

- Overnight visitors to the Kennebec & Moose River Valley tourism region are about 43 years old, on average, and have annual household incomes that average just over \$100,000. Two-thirds have at least a college degree and seven in ten are employed full-time. Two-thirds are married.

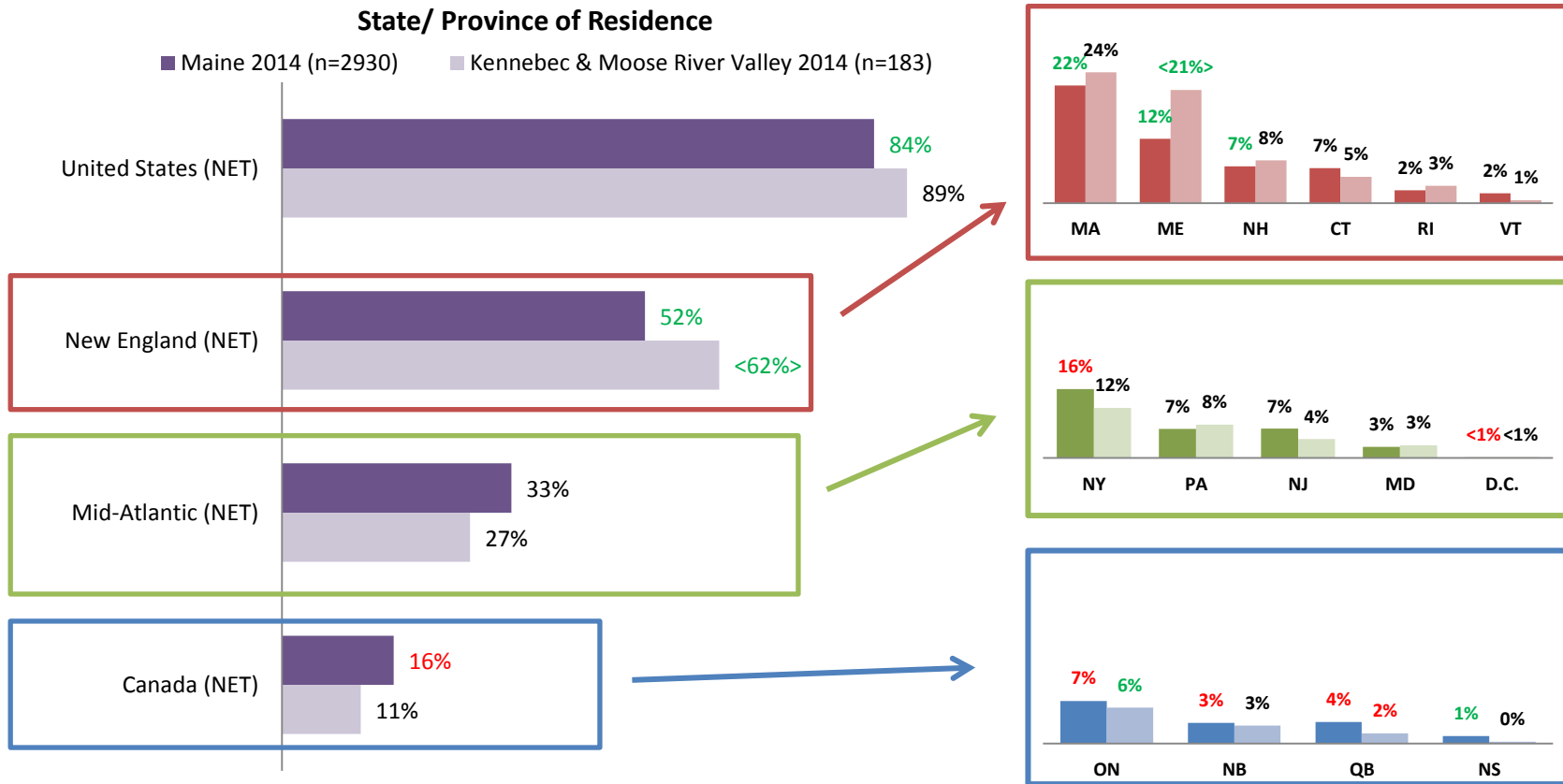
Overnight Visitors	Maine 2014 (n=2930)	Kennebec & Moose River Valley 2014 (n=183)
Age:		
< 35	29%	32%
35 - 44	19%	23%
45 - 54	20%	20%
55 +	<32%>	25%
Mean Age (Years)	45.4	43.5
Income:		
< \$50,000	16%	20%
\$50,000 - \$99,999	40%	34%
\$100,000 +	44%	46%
Mean Income (Thousands)	\$106,260	\$101,780
Female	54%	53%
College Degree or Higher	74%	66%
Married	66%	67%
Employed Full Time	62%	69%

<> 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.

Nine in ten visitors to the Kennebec & Moose River Valley region originate in the US, with most arriving from New England.

- Visitors to this region are more likely to originate in New England than Maine visitors overall (62% vs. 52%). Specifically, in-state visitors make up a higher proportion of overnight visitors to the Kennebec & Moose River Valley region than of overnight visitors to the State of Maine as a whole.



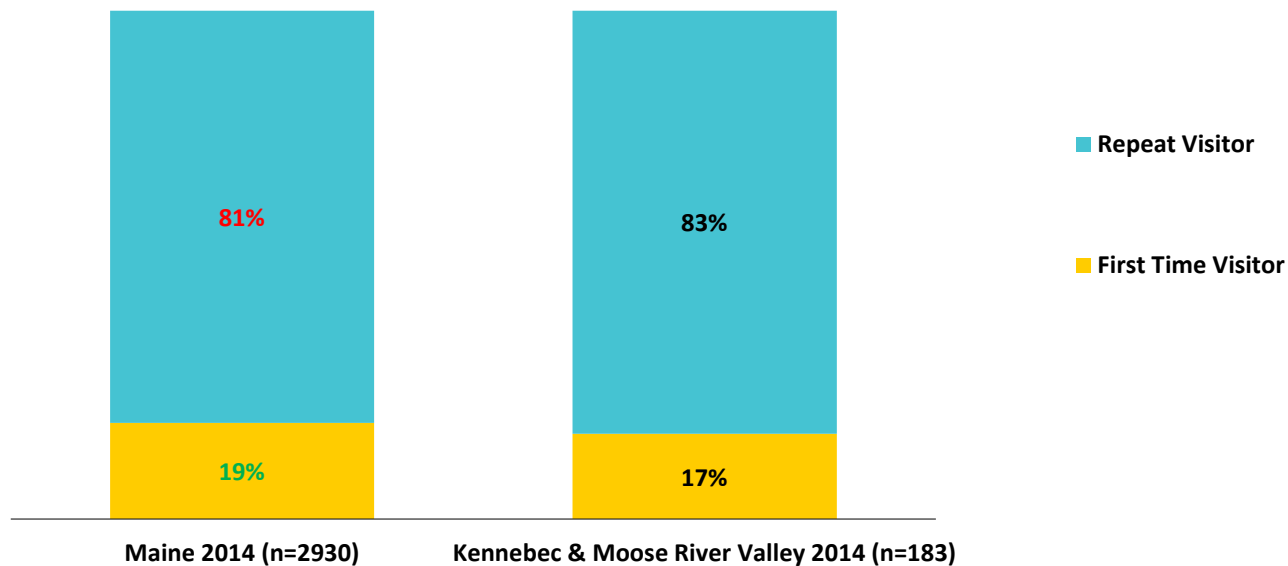
State/ Province of Residence

<> 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.

Four in five overnight visitors to the Kennebec & Moose River Valley region have previously visited Maine.

Repeat vs. First Time Visitors

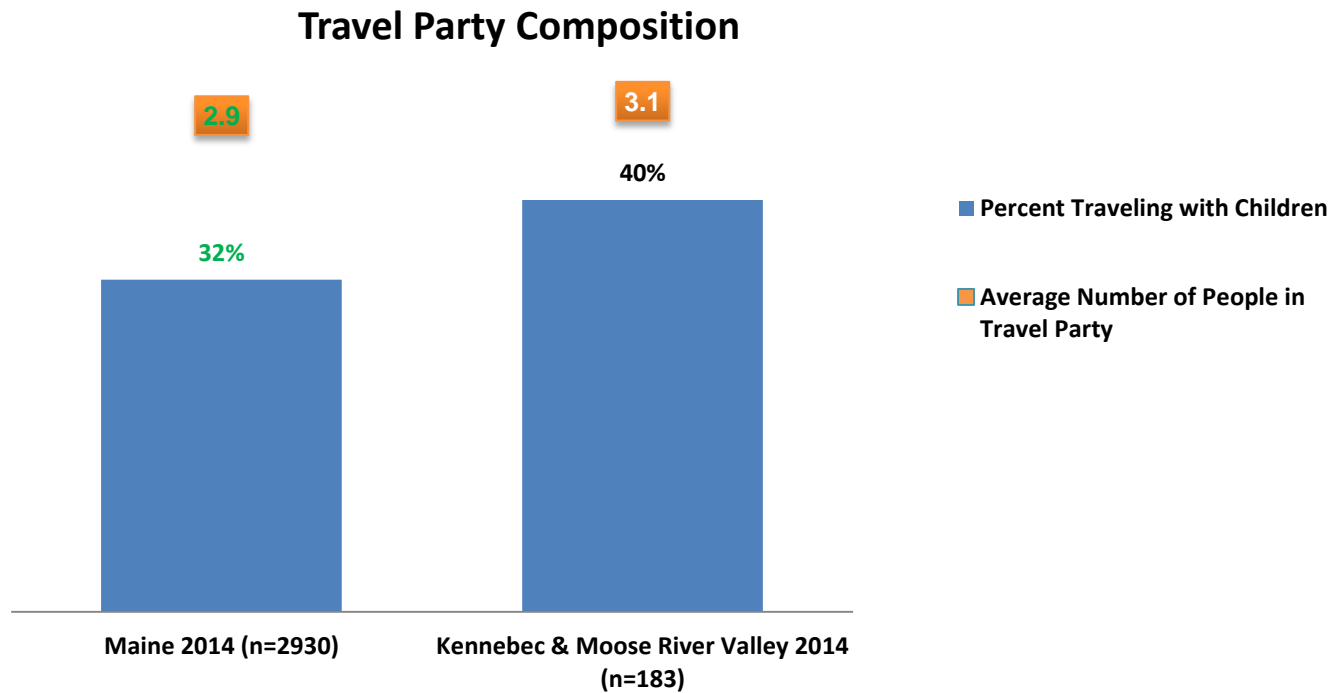


Q11. Was this your first visit in Maine?

Q12. 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.

Two in five overnight visitors are traveling with children, with an average travel party including about three people.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q19. How many of these people were: Children?

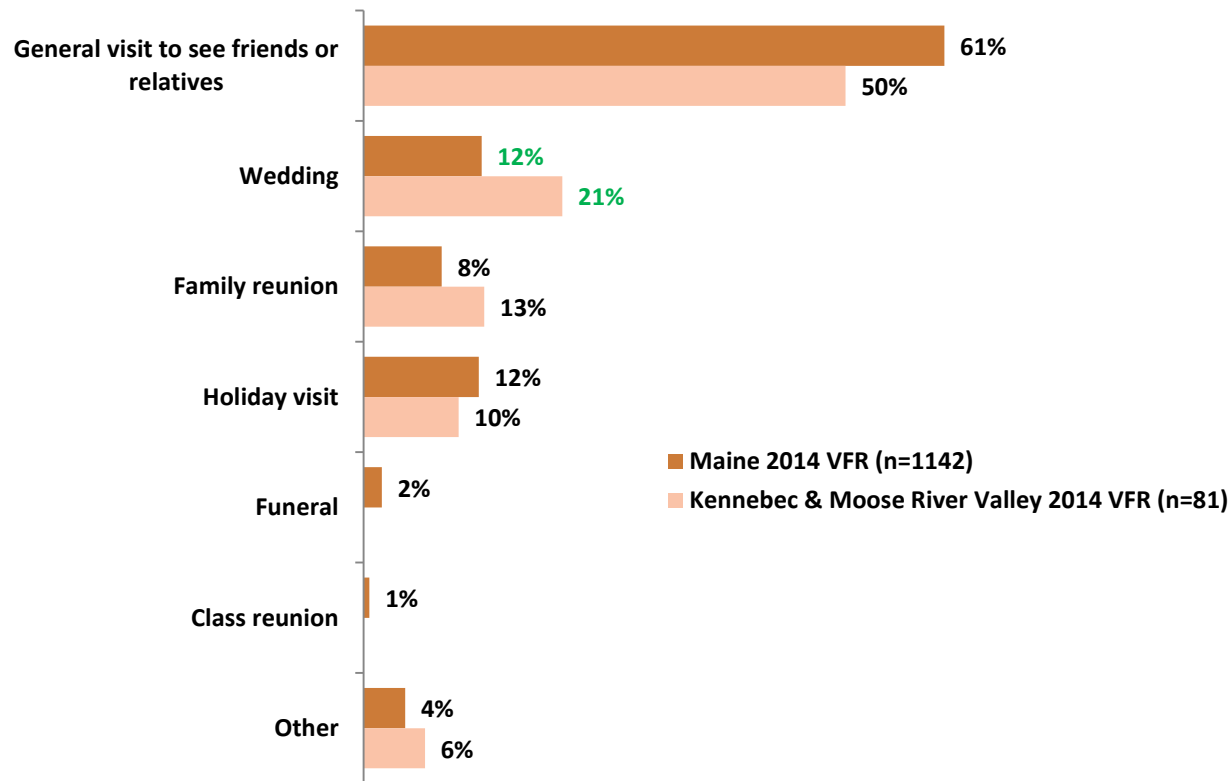
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



Half of VFR visitors to the region cite a *general visit to see friends or relatives* as the primary purpose of their trip.

Primary Purpose of Overnight VFR Trips



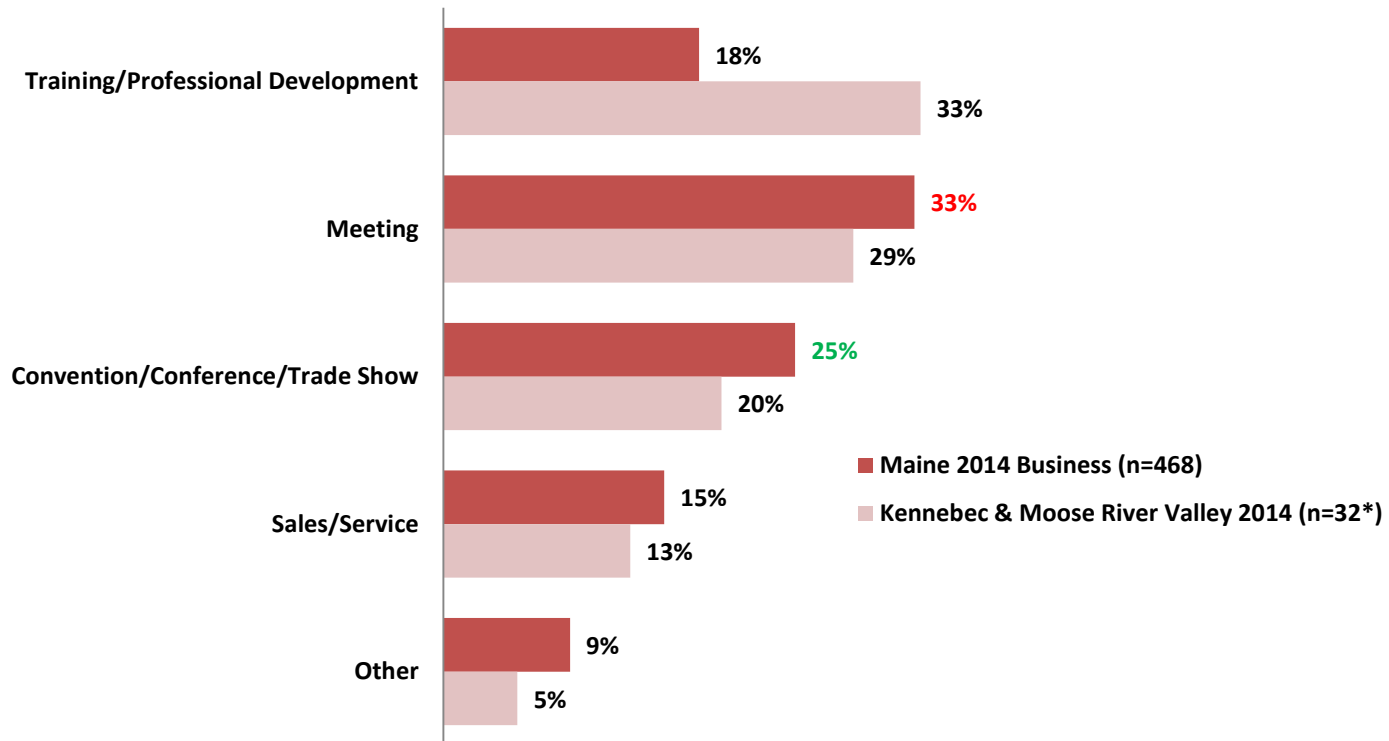
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> indicates a significant difference between 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.

Training/professional development is the most commonly cited purpose of an overnight business trip to the region.

Primary Purpose of Overnight Business Trips



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

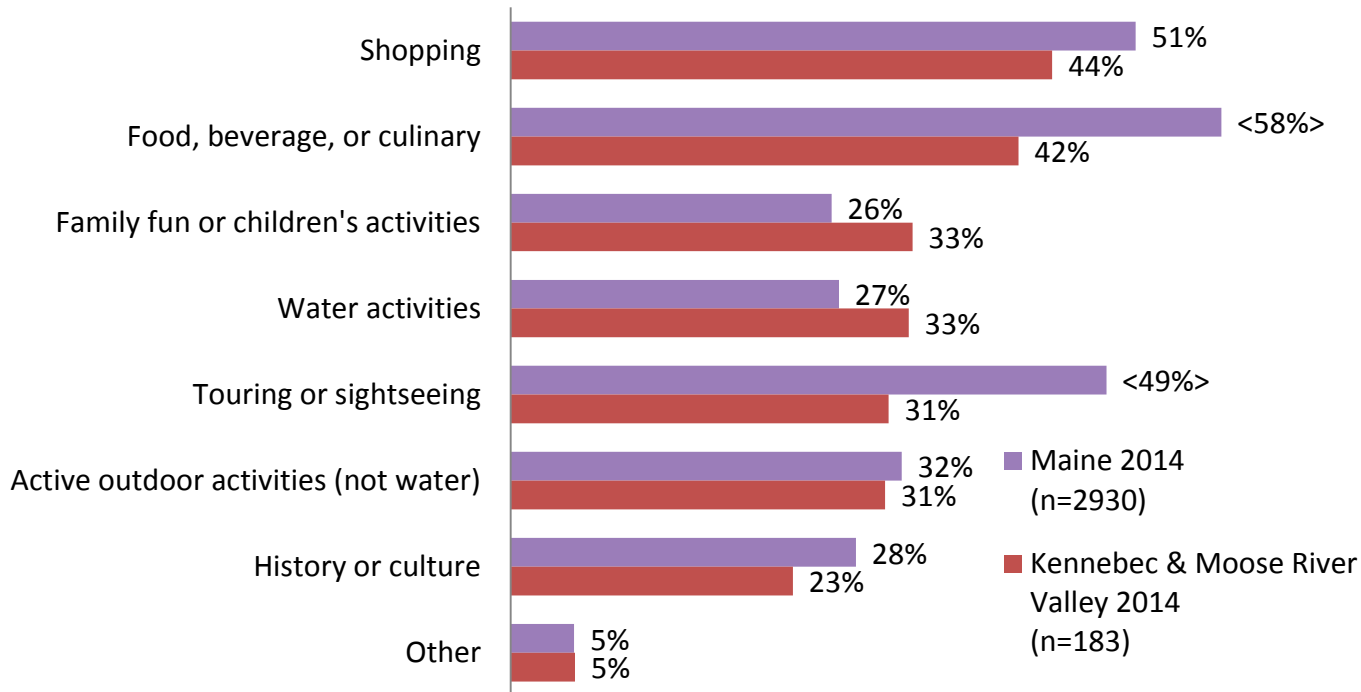
<> indicates a significant difference between subgroups at the 95% confidence level.

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

**Please note small sample size.*

The most commonly pursued interest areas by overnight visitors to this region include *shopping* and *food, beverage, or culinary* interests.

2014 Interest Areas*



Most Important Interest Area Kennebec & Moose River Valley	
Shopping	22%
Food, beverage, or culinary	39%
Family fun or children's activities	47%
Water activities	61%
Touring or sightseeing	59%
Active outdoor activities (not water)	28%
History or culture	29%
Other	92%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q30. 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. 14

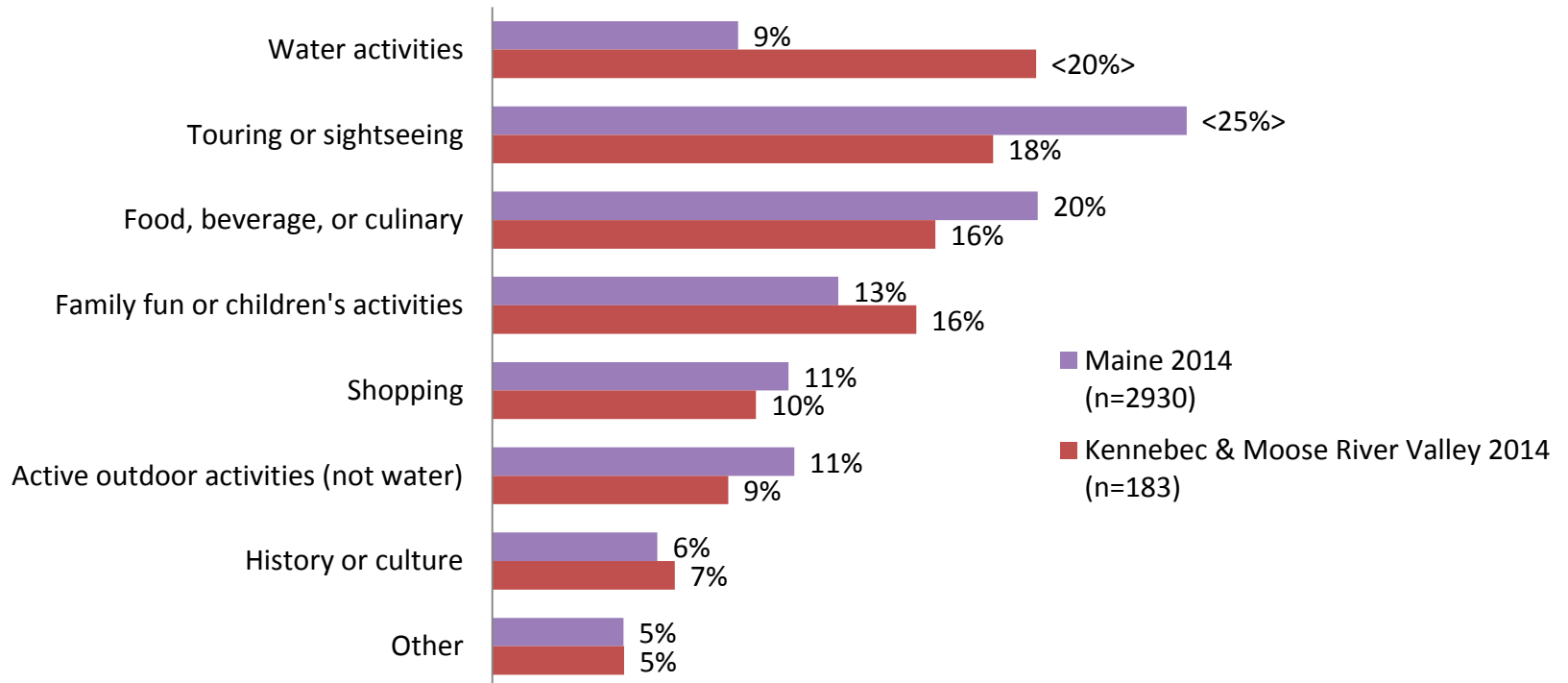
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

When analyzing both interest and importance in deciding to visit, water activities and touring/sightseeing activities rank highest.

- When looking at both interest areas and the relative importance of those interests, overnight visitors to the Kennebec & Moose River Valley region are more likely than visitors to the State as a whole to select *water activities* and less likely to select *touring/sightseeing* interests.

2014 Interest Areas*
Importance Index



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? Please check all that apply.

Q30. 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

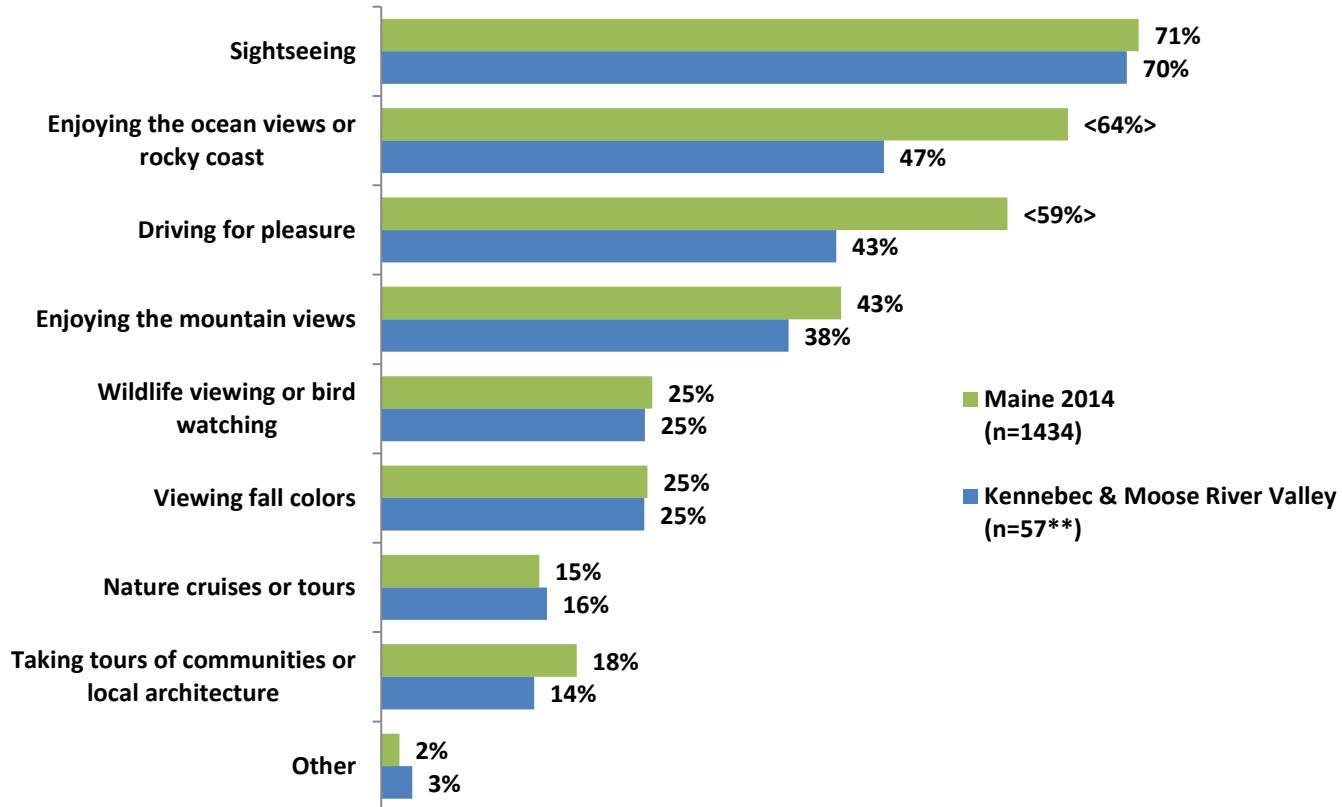
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Sightseeing is the most common activity pursued by those interested in touring or sightseeing.

Touring or Sightseeing Activities*

Base: Those who report touring or sightseeing as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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

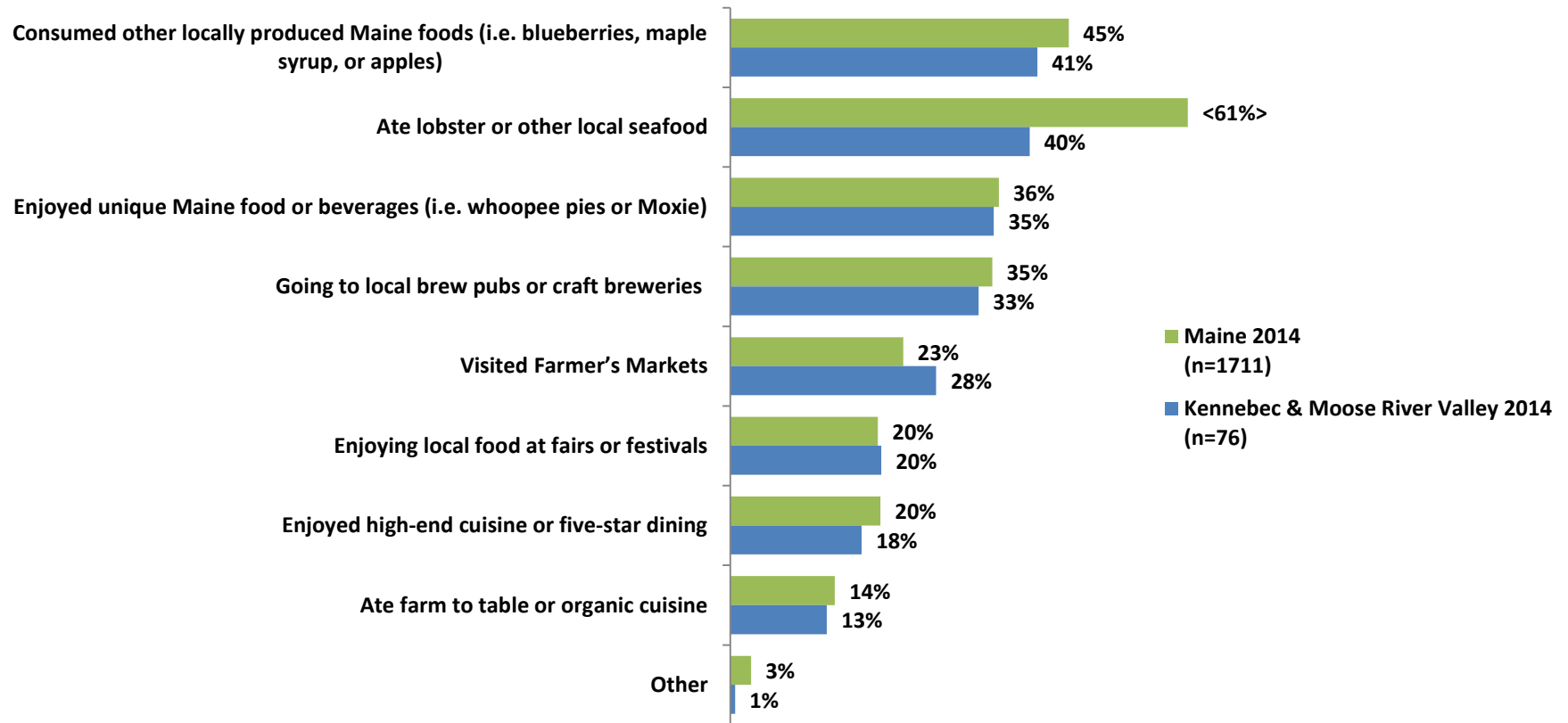
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Overnight visitors interested in food/beverage/culinary activities are most likely to *consume locally produced Maine foods or eat lobster or other seafood while visiting.*

Food, Beverage, or Culinary Activities*

Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

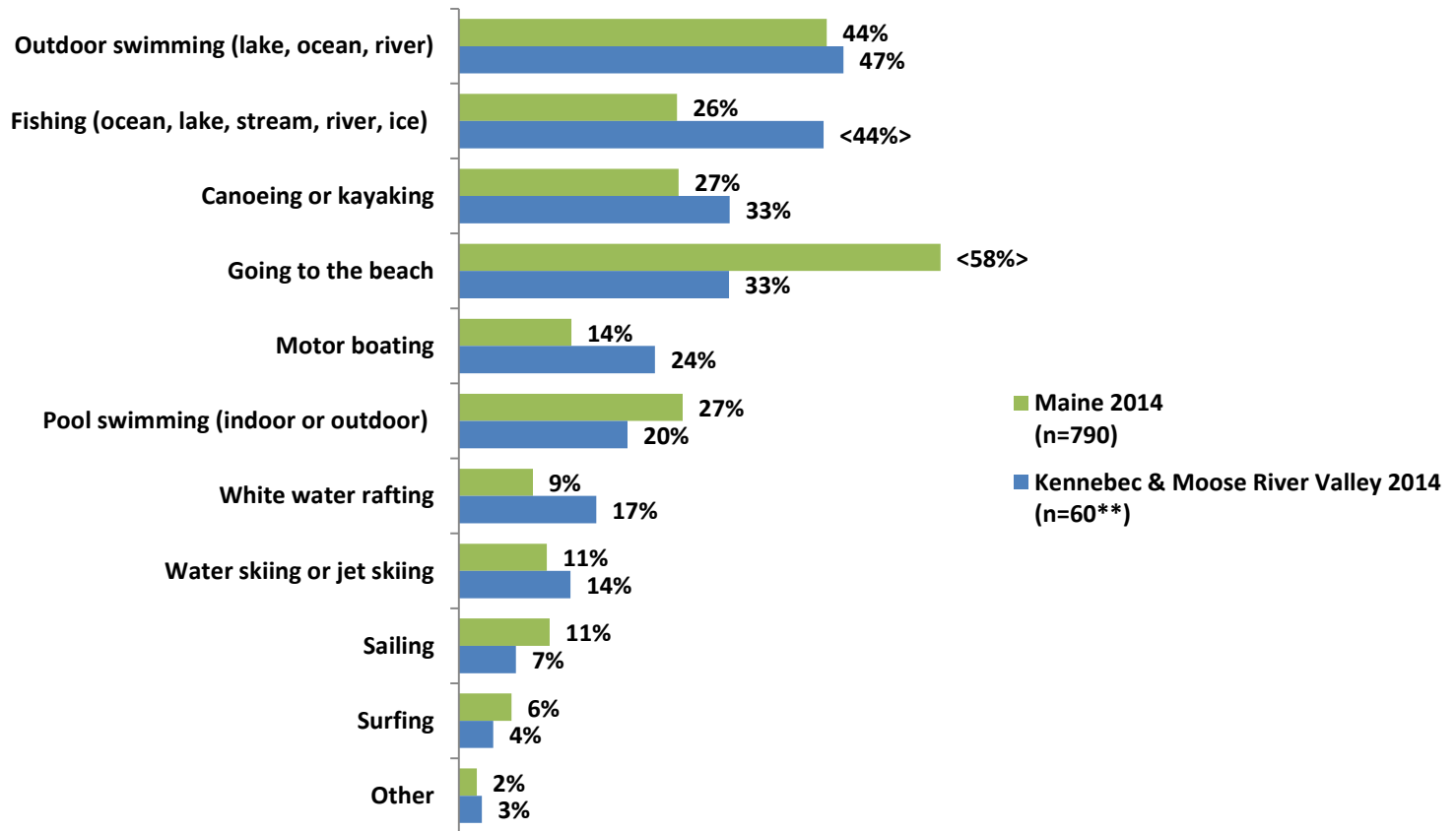
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Outdoor swimming and fishing are the most common water activities pursued by overnight visitors to the region.

- Overnight visitors to the region are more likely to *fish* while visiting, and less likely to *go to the beach* than are overnight visitors to Maine overall.

Water Activities*

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



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

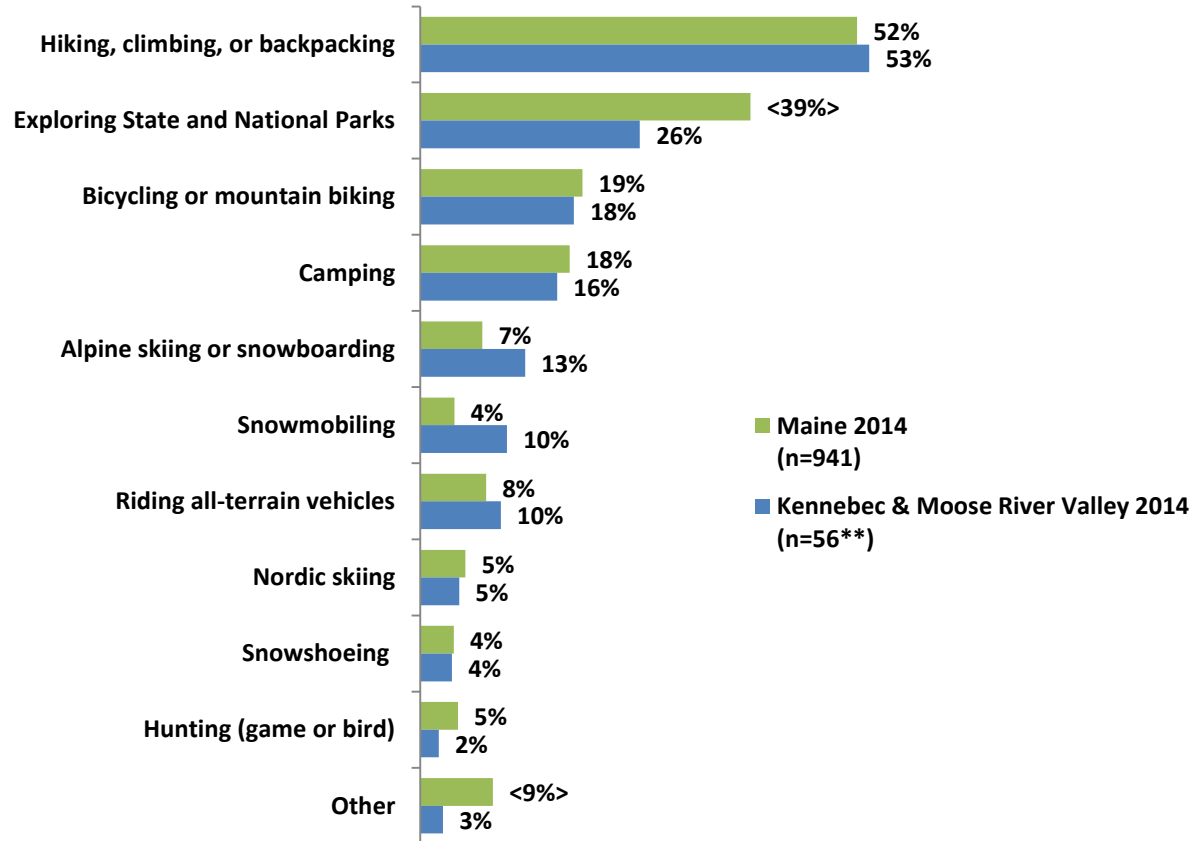
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Half of overnight visitors interested in active outdoor activities participate in *hiking, climbing, or backpacking* while visiting the Kennebec & Moose River Valley region.

Active Outdoor Activities – Non-Water*

Base: Those who report outdoor activities as an interest area for this Maine trip



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

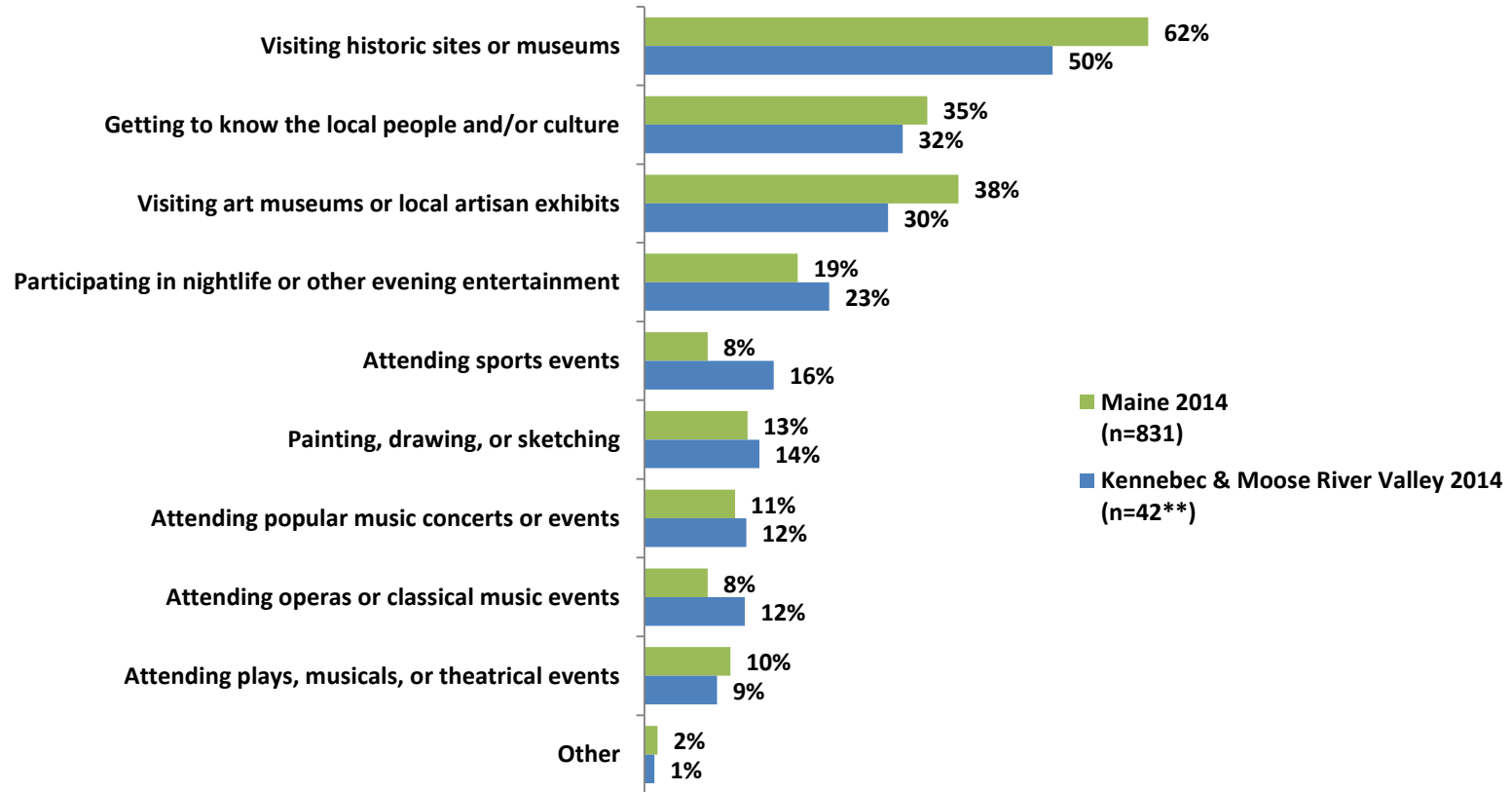
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Among overnight visitors to the region who are interested in history or culture, the most common activity is *visiting historic sites or museums*.

History or Culture Activities*

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



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

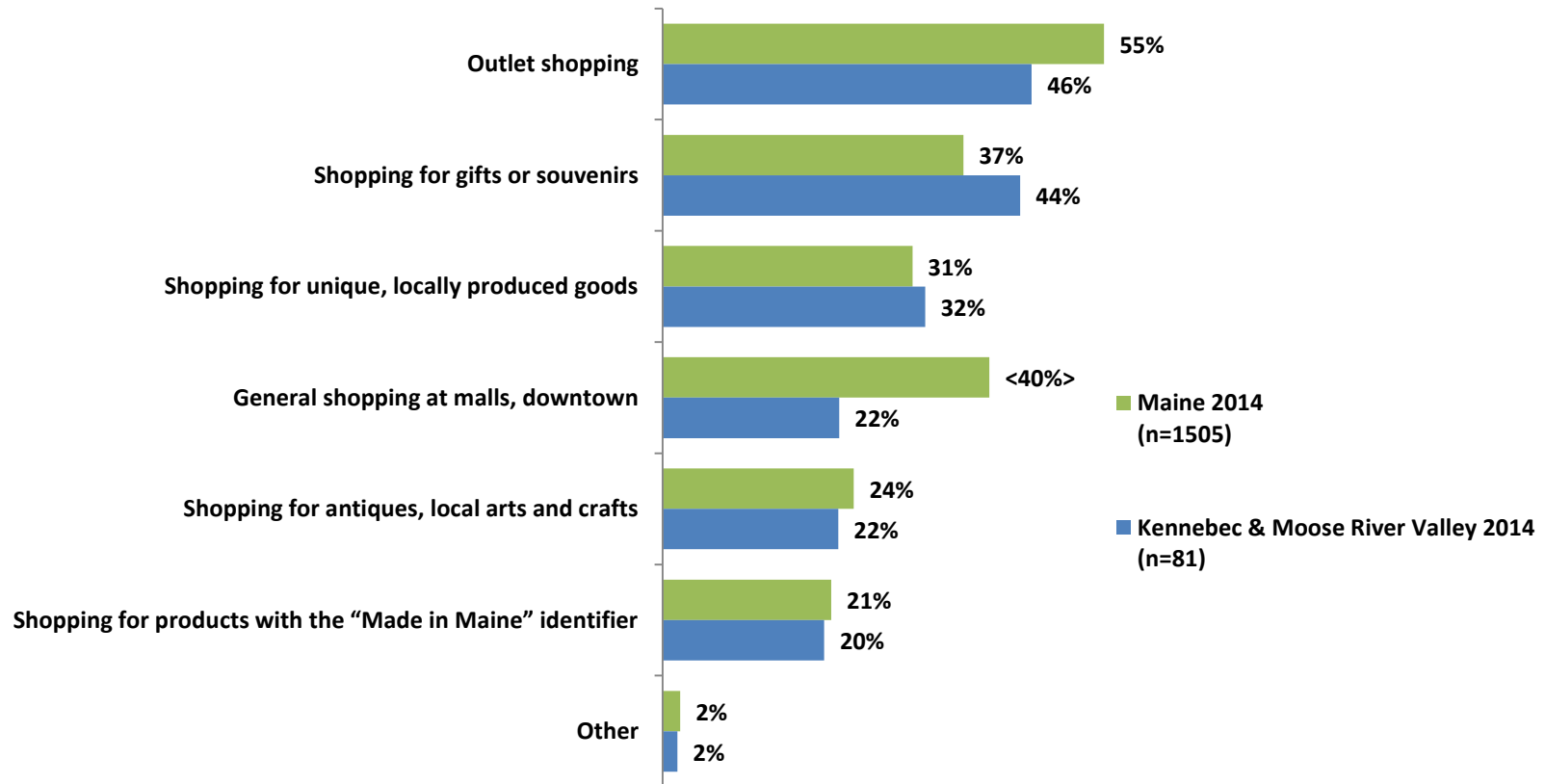
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Outlet shopping and shopping for gifts/souvenirs are the most common shopping activities among overnight visitors to the region who are interested in shopping.

Shopping Activities*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

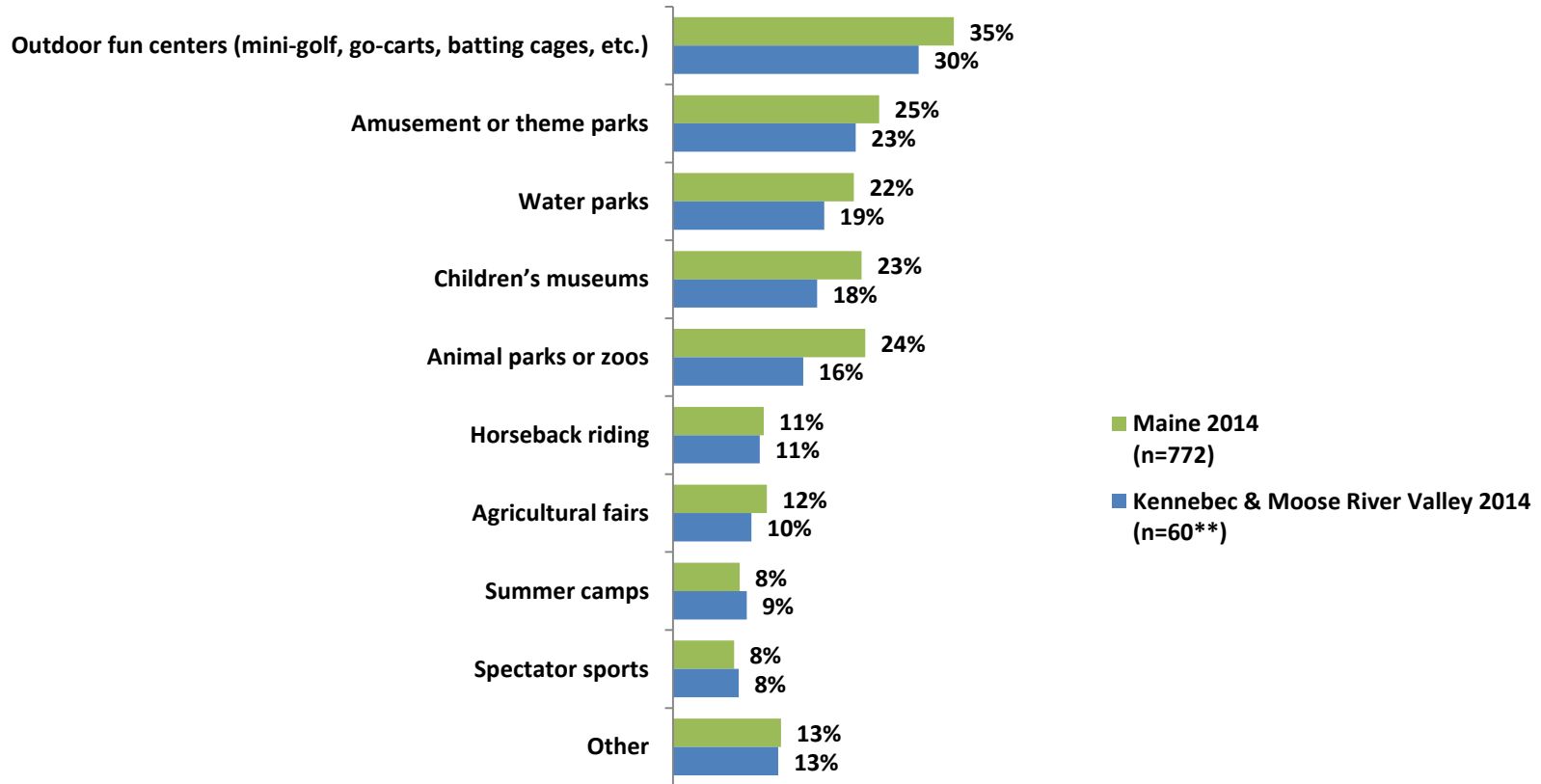
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Outdoor fun centers are the most common family fun/children's activity.

Family Fun/Children's Activities*

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



Q31. In which of the following activities did you participate during this trip? Please check all that apply.

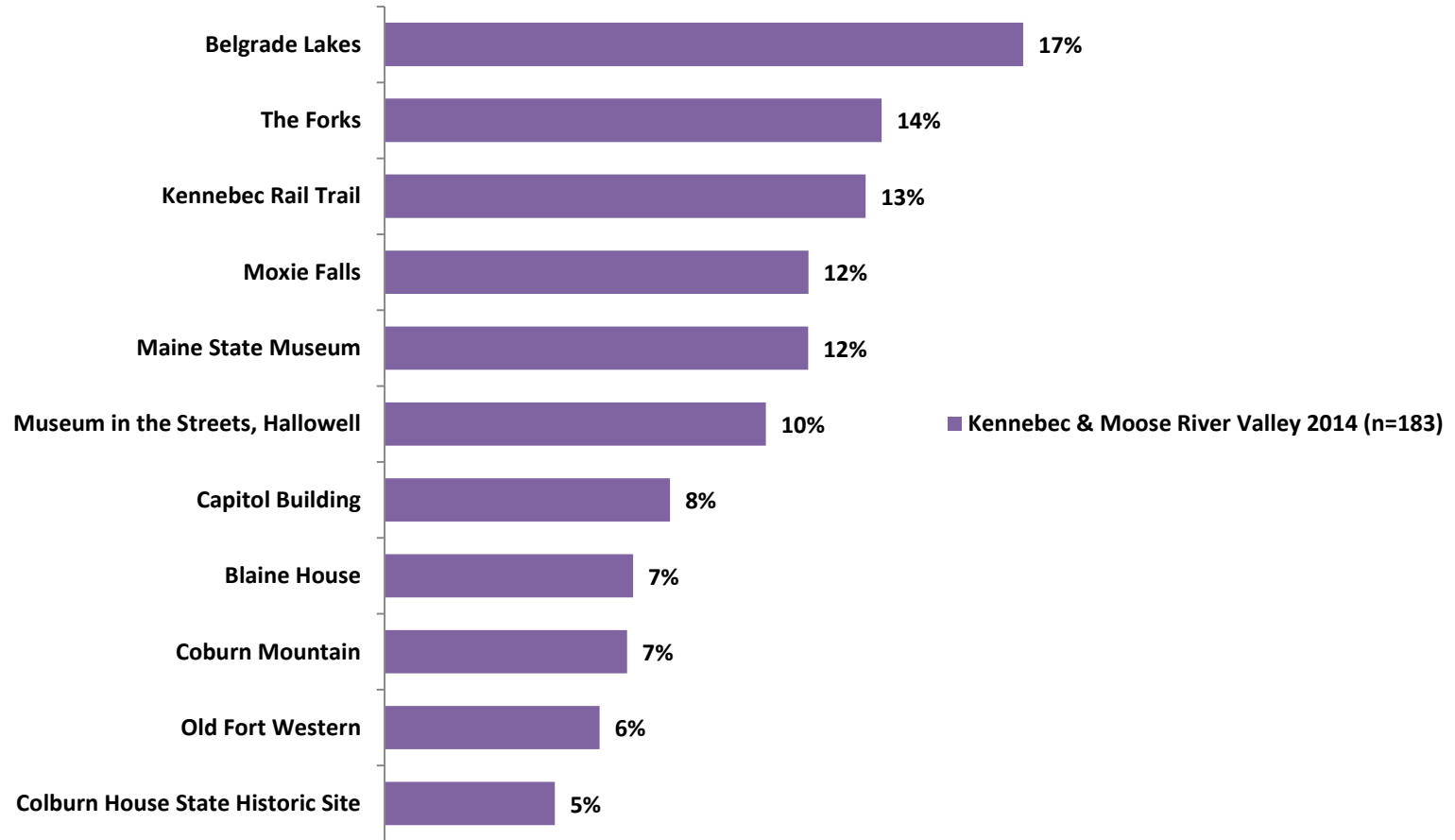
<> indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Attractions/locations visited in this region are varied with fewer than one in five visiting Belgrade Lakes, although it ranks highest on the list.

Top Attractions/Locations Visited

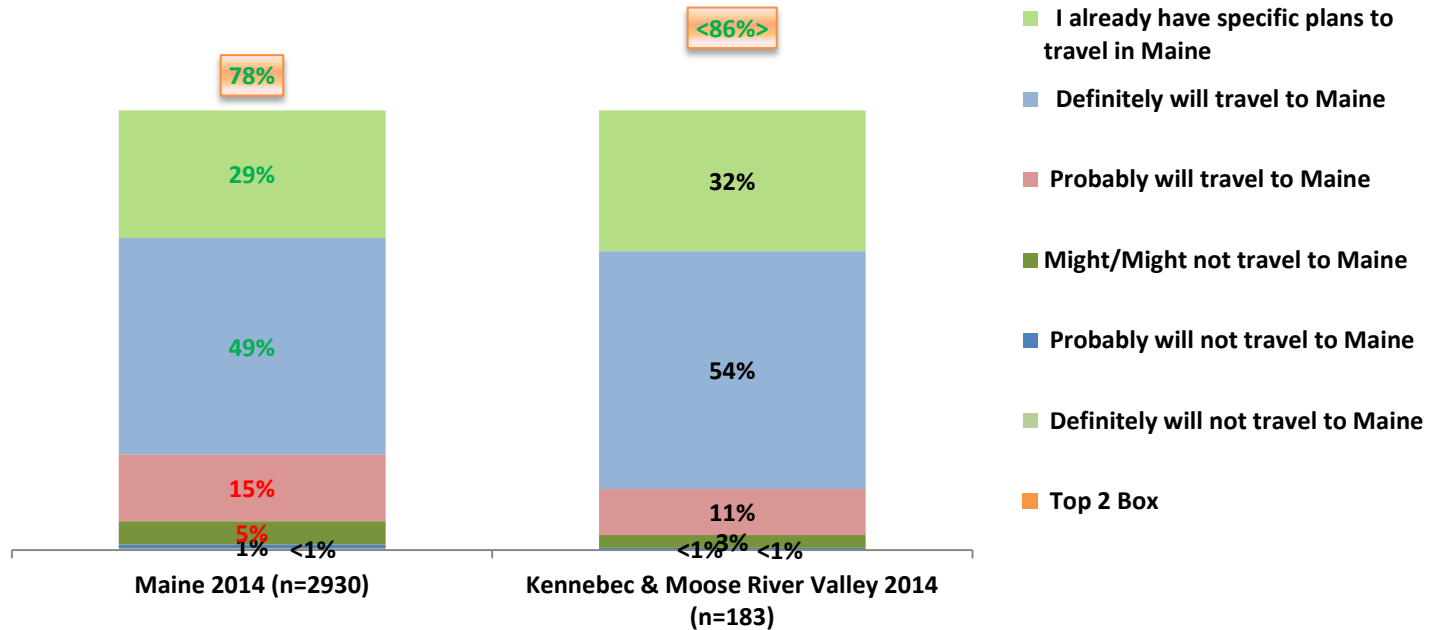


Q26: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

Nearly nine in ten overnight visitors to the region plan to return to Maine in the next two years.

- A higher proportion of overnight visitors to this region indicate that they either *already have specific plans to travel in Maine* or *definitely will travel in Maine* than do overnight visitors to the State overall.

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?

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 to the Kennebec & Moose River Valley region average around 45 years of age, earning about \$80,000 annually. Half have a college degree, and 56% are employed full-time. Sixty percent are married.
- Day visitors to this region have lower incomes on average than Maine visitors overall and are less likely to have a college degree.

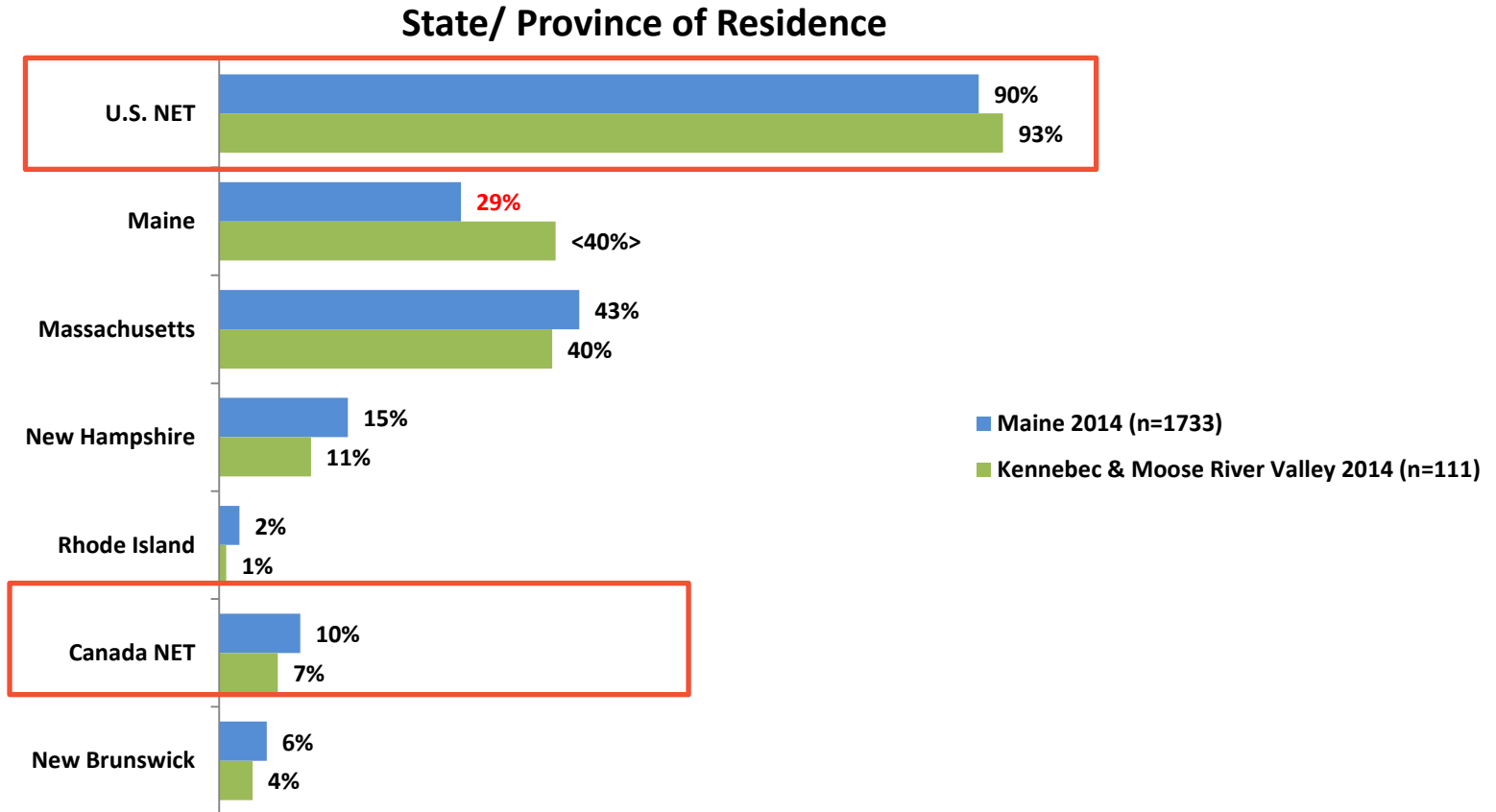
Day Visitors	Maine 2014 (n=1733)	Kennebec & Moose River Valley 2014 (n=111)
Age:		
< 35	24%	25%
35 - 44	16%	20%
45 - 54	22%	27%
55 +	38%	28%
Mean Age (Years)	47.9	45.6
Income:		
< \$50,000	22%	<38%>
\$50,000 - \$99,999	43%	<30%>
\$100,000 +	36%	32%
Mean Income (Thousands)	<\$93,610>	\$80,385
Female	56%	49%
College Degree or Higher	<69%>	55%
Married	64%	60%
Employed Full Time	54%	56%

<> 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.

Maine and Massachusetts provide the majority of day visitors to the Kennebec & Moose River Valley region.

- In-state day visitors comprise a higher proportion of visitors to this region than to the State of Maine as a whole.

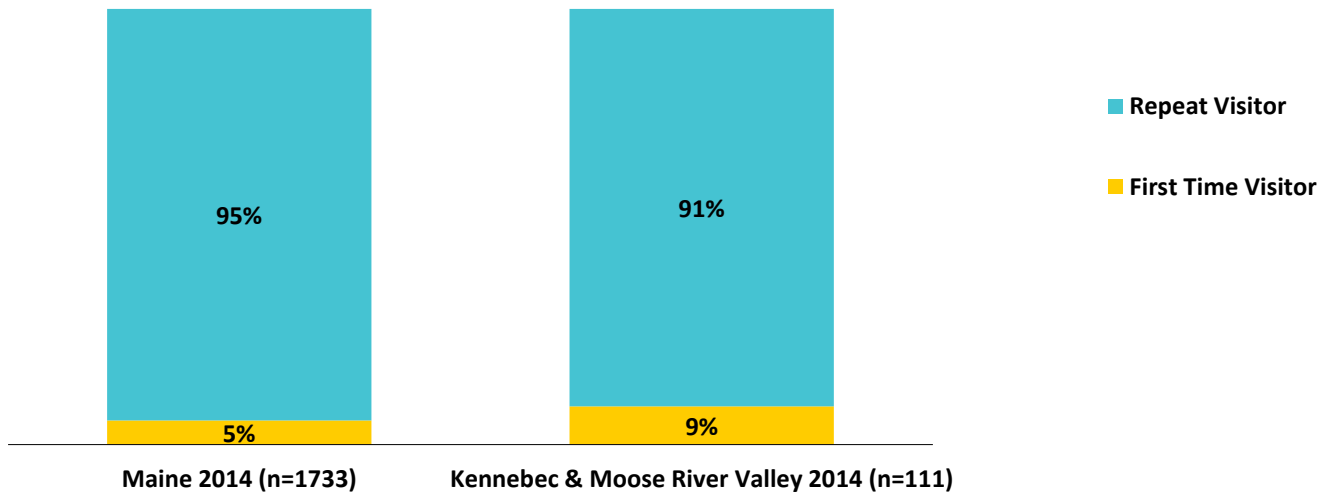


Q2. In what State or Province do you reside?

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

Nine in ten day visitors to the Kennebec & Moose River Valley are repeat visitors.

Repeat vs. First Time Visitors



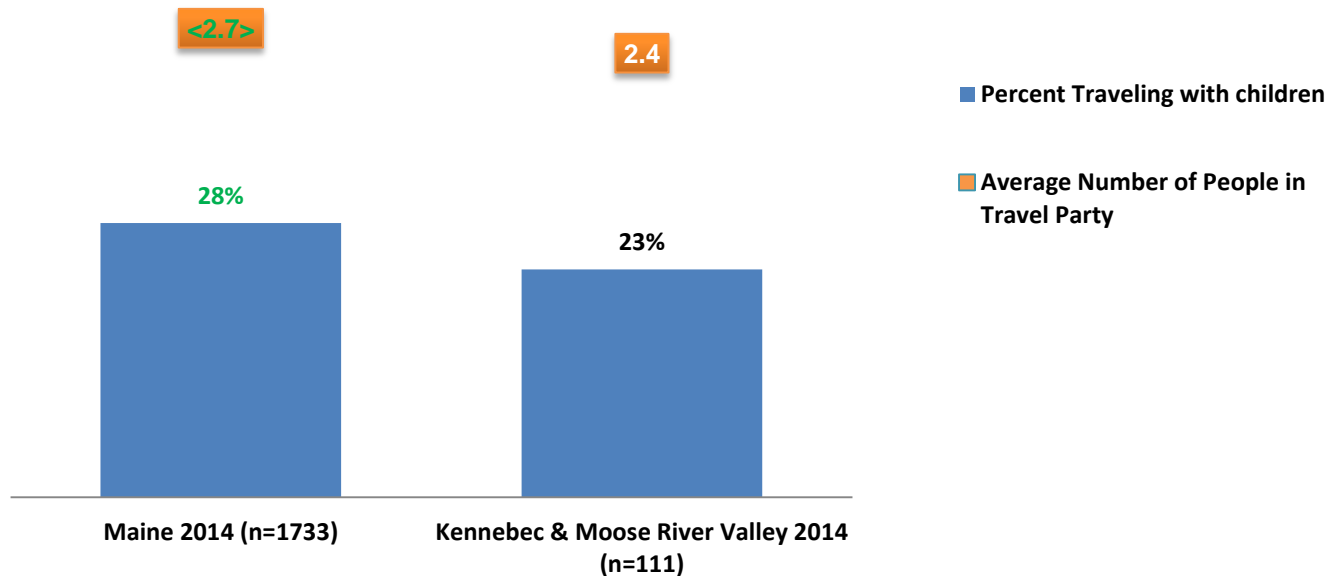
Q10. Was this your first trip to Maine?

Q11. 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 travel parties to the region include children, and the average travel party consists of two or three people.

Travel Party Composition



Q14. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q15. How many of these people were: Children

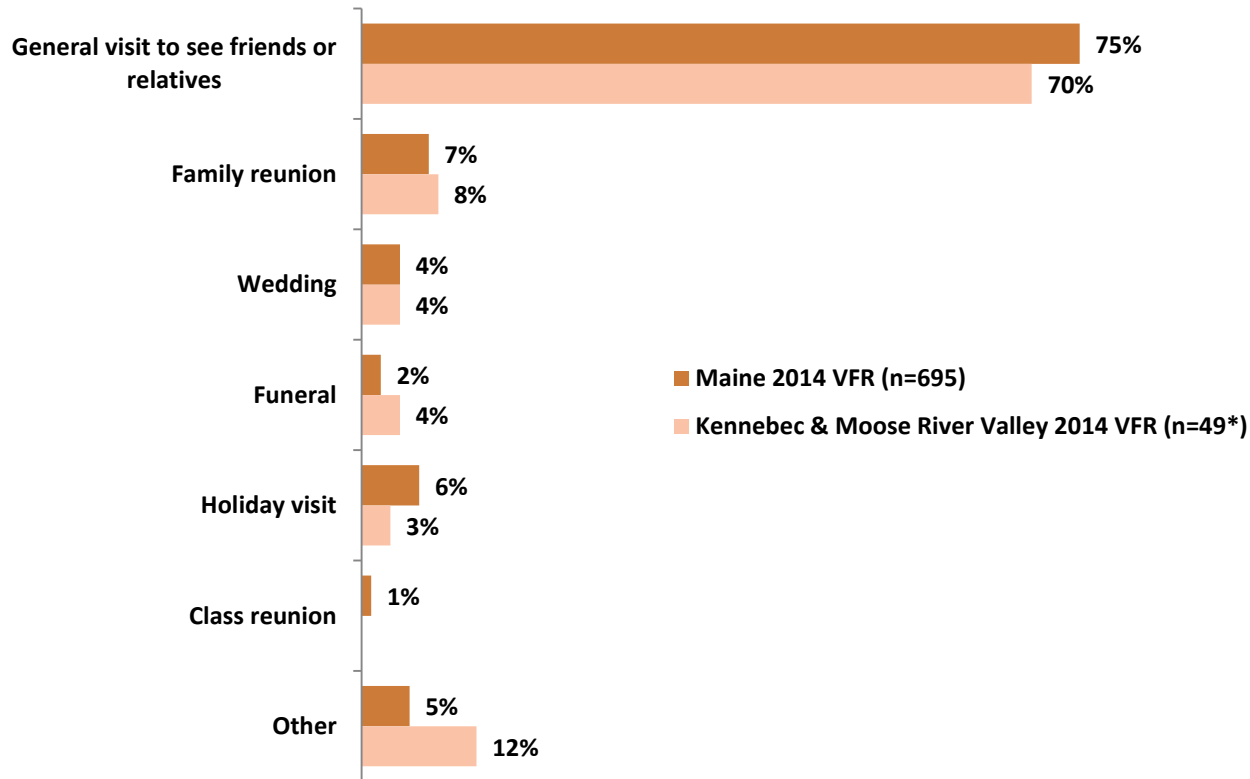
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Seven in ten VFR travelers to the region cite a *general visit to see friends/relatives* as the primary purpose of their day trip.

Primary Purpose of Day VFR Trips



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

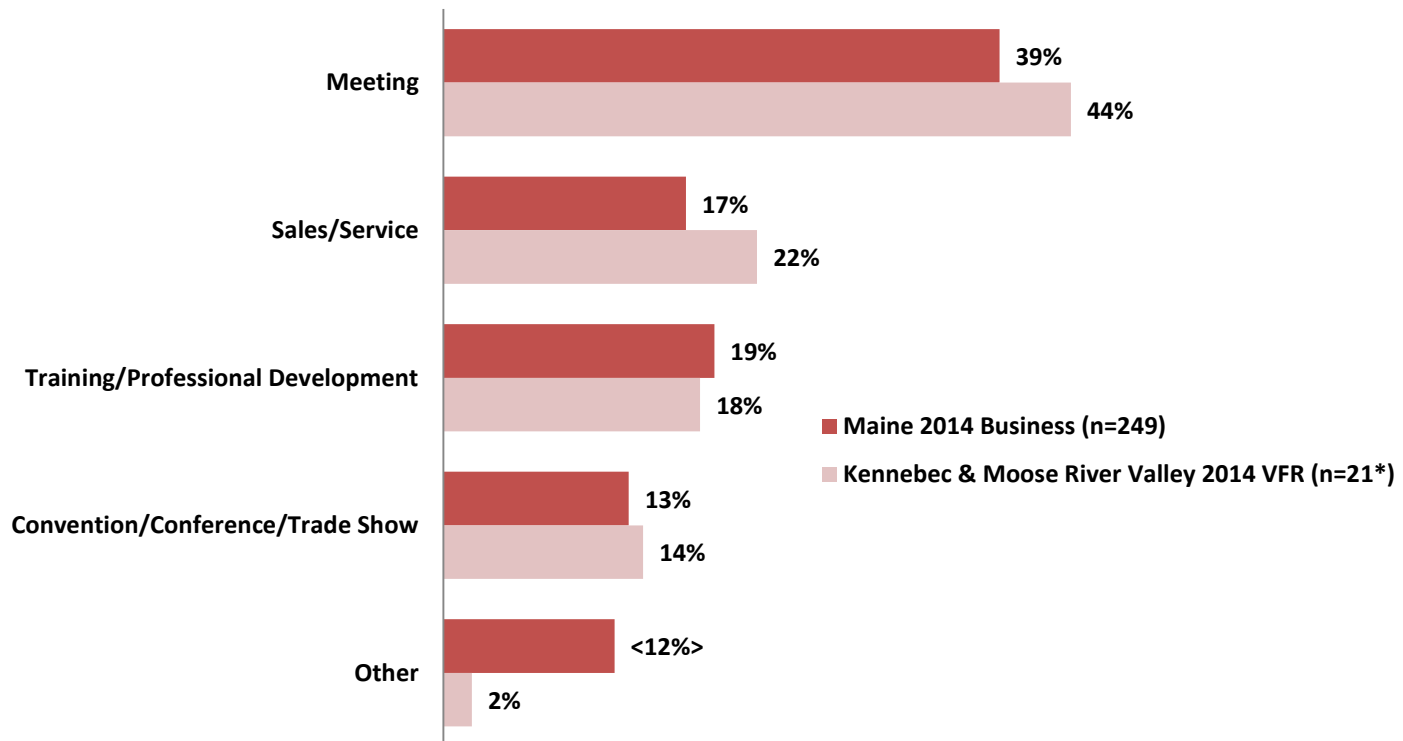
<> indicates a significant difference between subgroups at the 95% confidence level.

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

**Please note small sample size.*

Business day travelers are most likely to be in the Kennebec & Moose River Valley region for a *general meeting*.

Primary Purpose of Day Business Trips



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

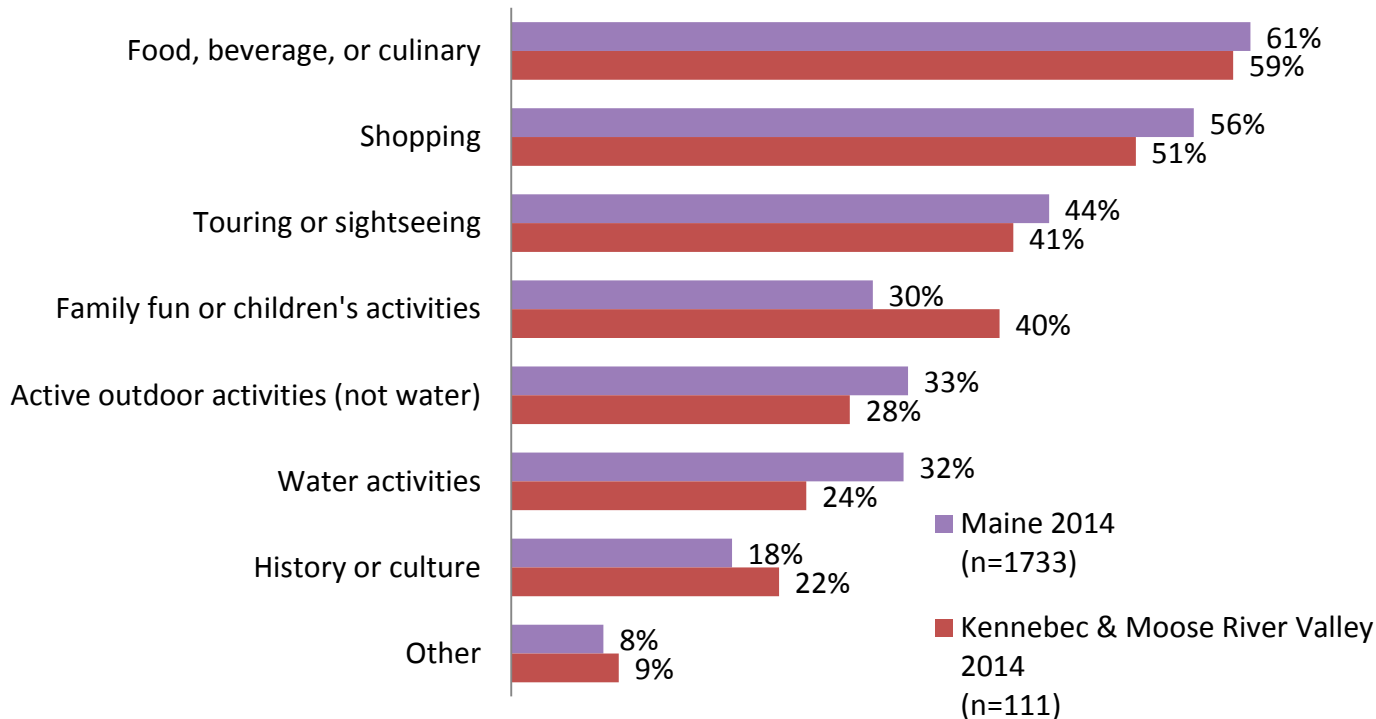
<> indicates a significant difference between subgroups at the 95% confidence level.

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

**Please note small sample size.*

Food/beverage/culinary interests are the most commonly pursued interests of day visitors to the Kennebec & Moose River Valley.

2014 Interest Areas*



Most Important Interest Area Kennebec & Moose River Valley	
Food, beverage, or culinary	21%
Shopping	27%
Touring or sightseeing	47%
Family fun or children's activities	58%
Active outdoor activities (not water)	39%
Water activities	46%
History or culture	11%
Other	78%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

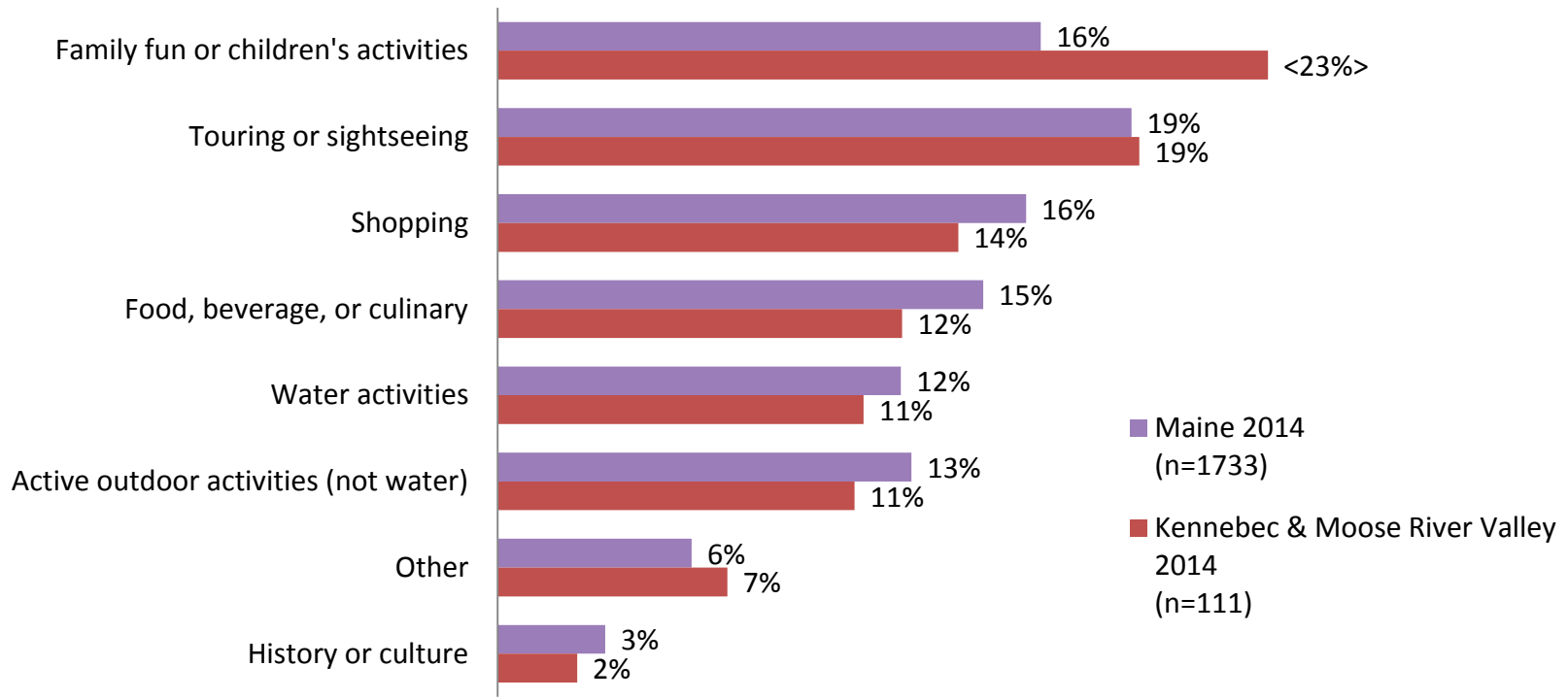
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

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

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

When analyzing both interest and importance in deciding to visit, family fun/children's activities rank highest among day visitors to this region, followed by touring/sightseeing.

2014 Interest Areas*
Importance Index

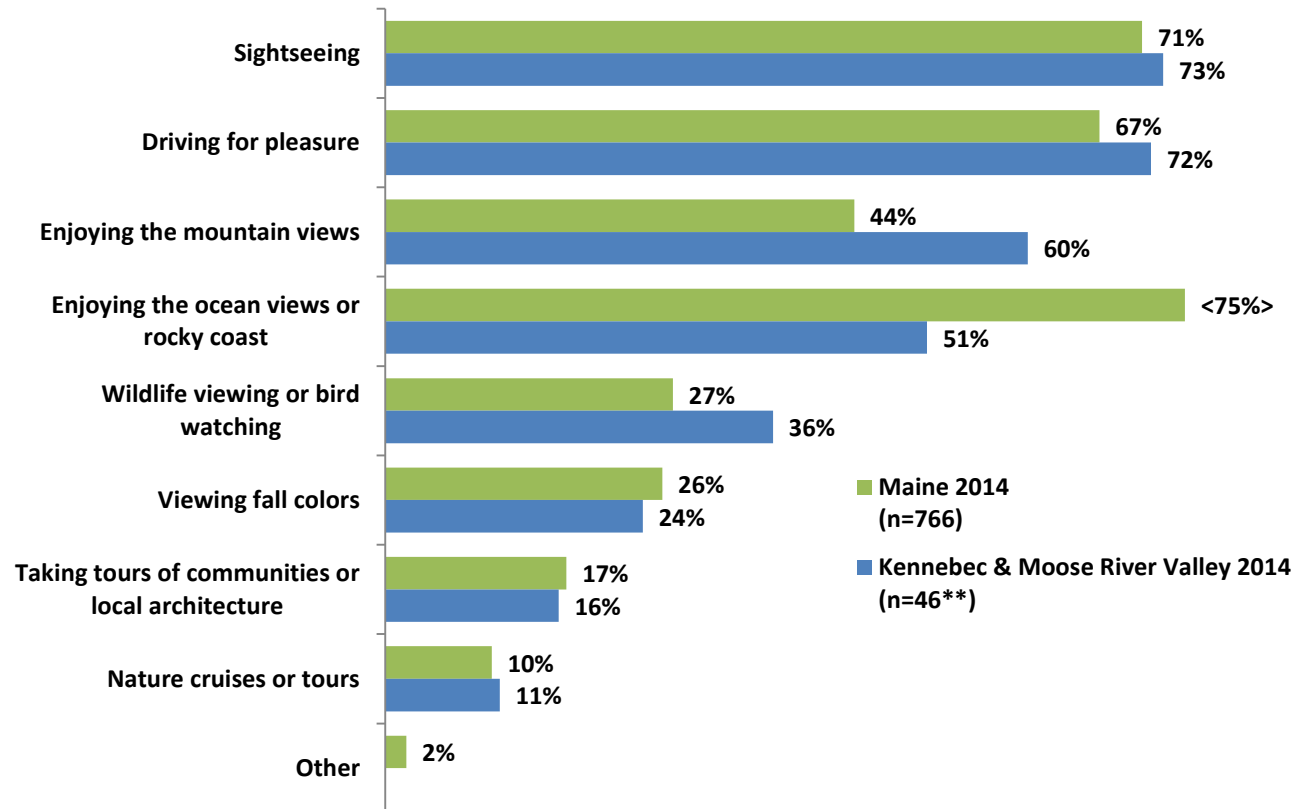


Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Sightseeing and driving for pleasure are the most common activities among day visitors to this region interested in touring or sightseeing activities.

Touring or Sightseeing Activities*

Base: Those who report touring or sightseeing as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

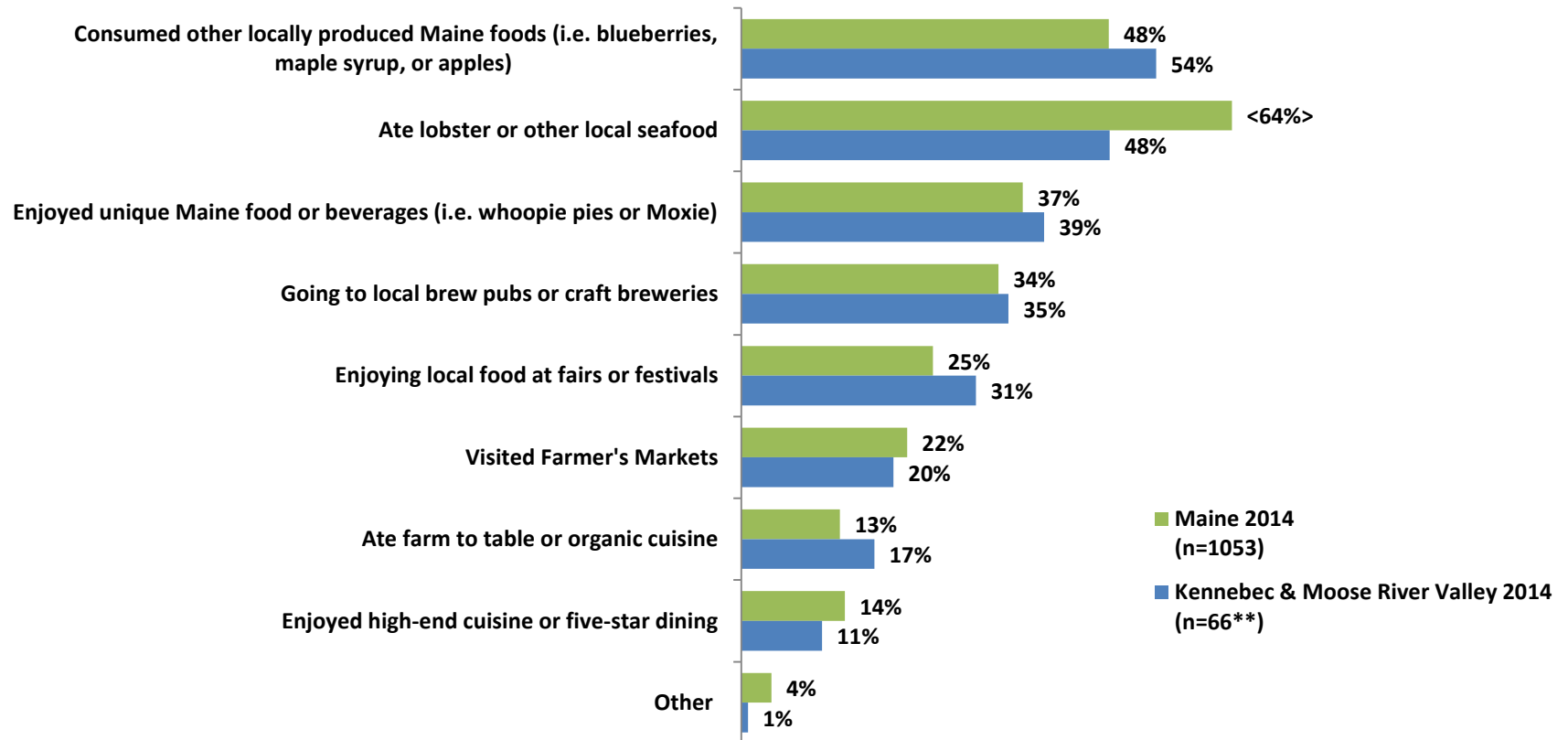
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

A majority of those interested in food/beverage/culinary activities consumed locally produced Maine foods while in the Kennebec & Moose River Valley for the day.

Food, Beverage, or Culinary Activities*

Base: Those who report food, beverage, or culinary as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

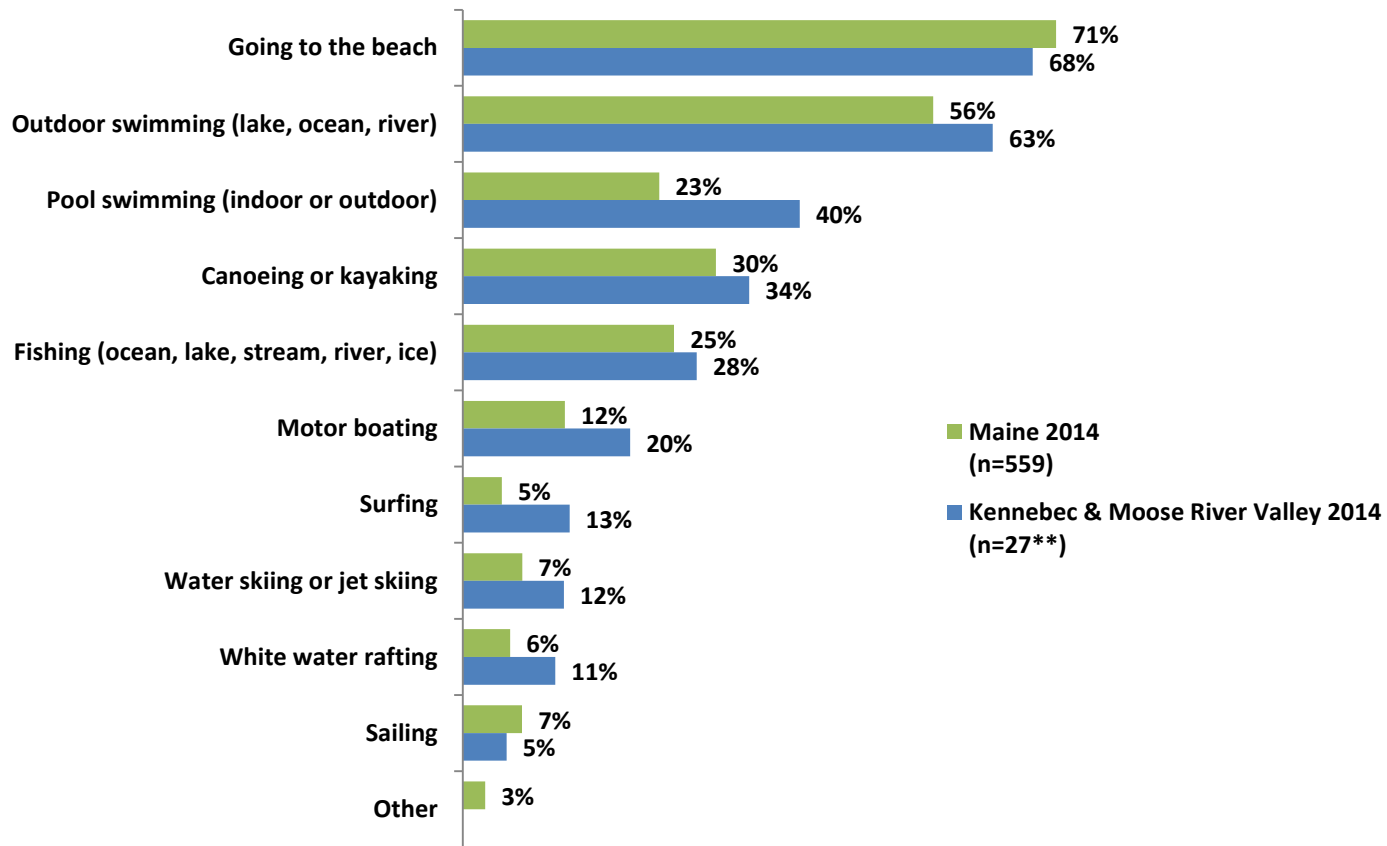
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Going to the beach and outdoor swimming are the most common water activities pursued in this region by day visitors.

Water Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

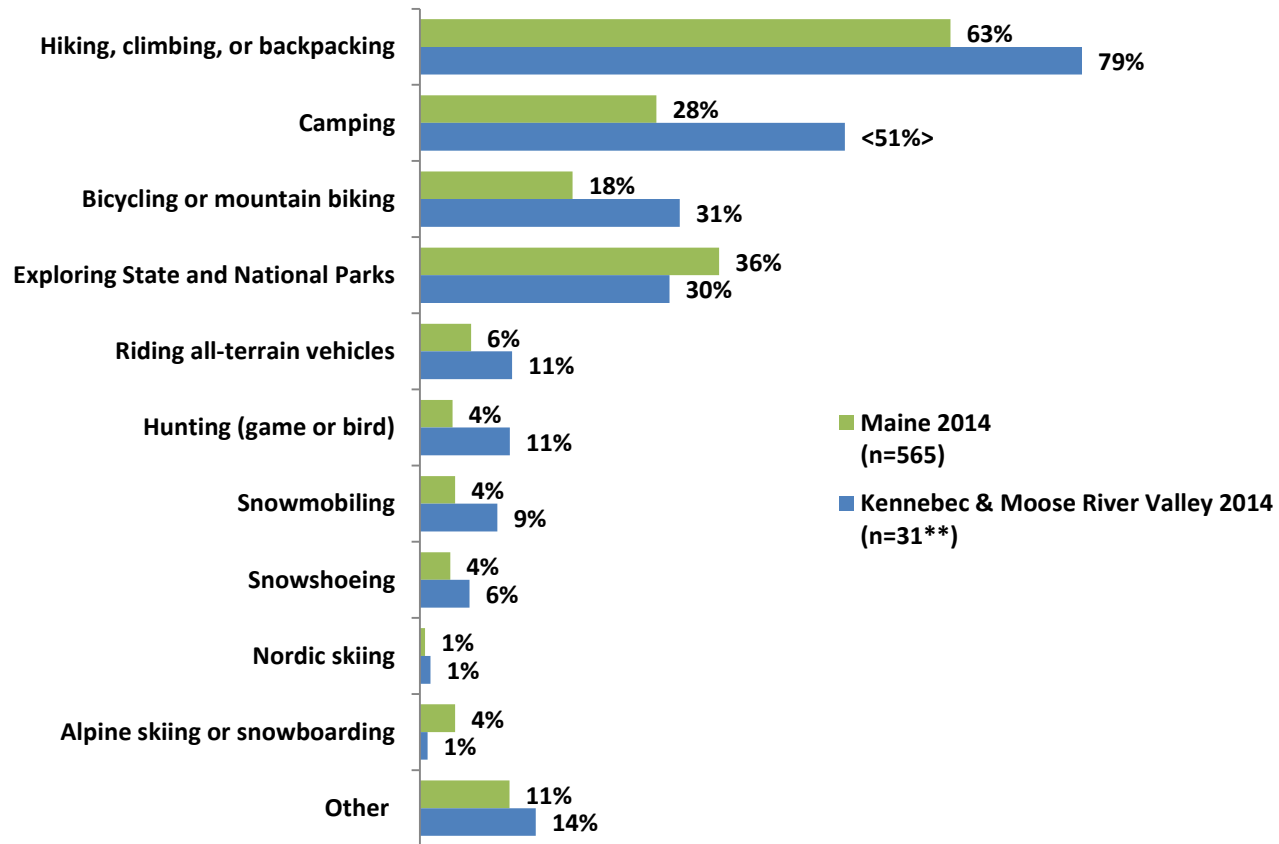
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Four in five day visitors interested in active outdoor activities hike, climb, or backpack while in this region.

Active Outdoor Activities – Non-Water*

Base: Those who report outdoor activities as an interest area for this Maine trip



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

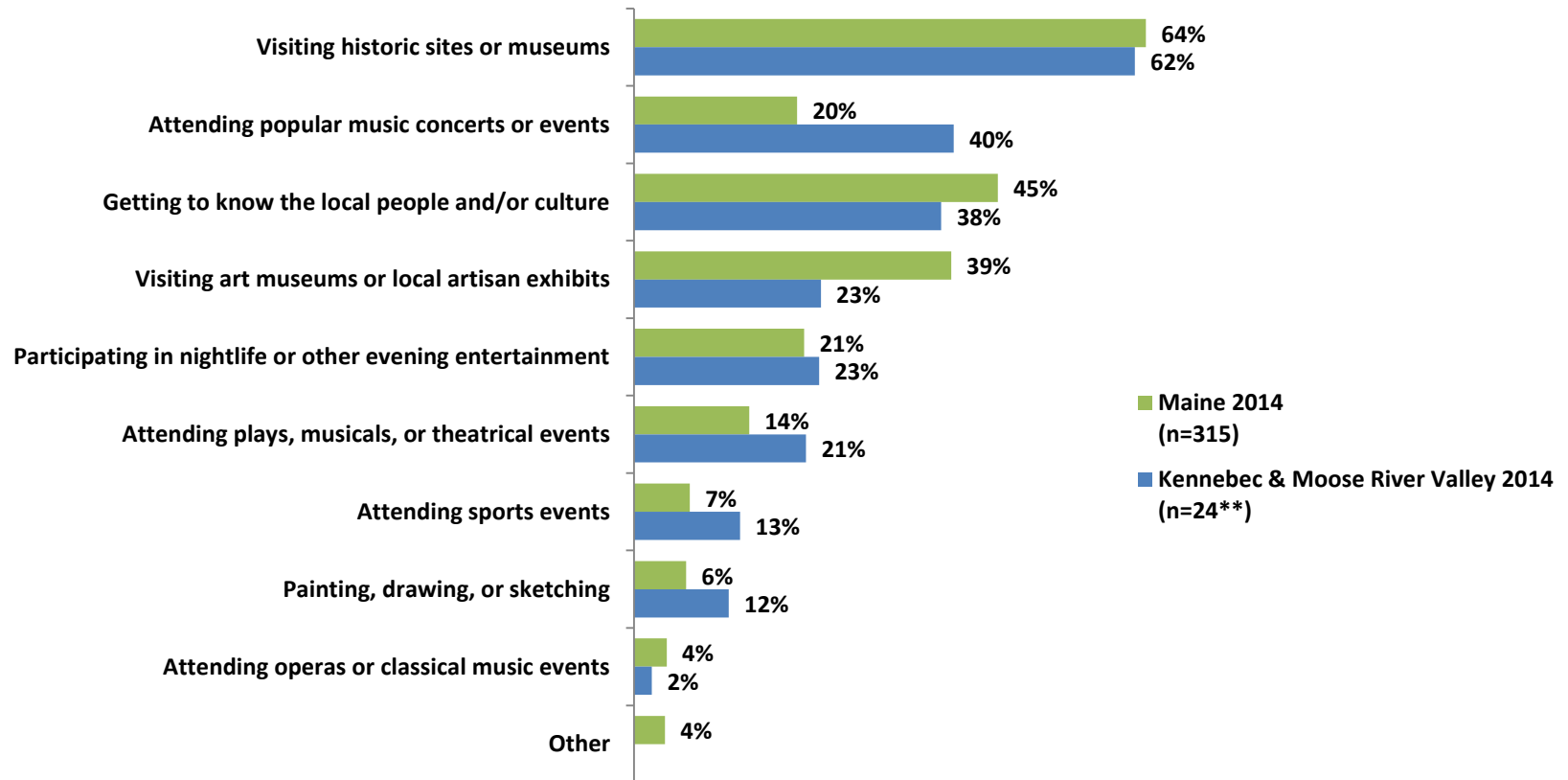
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Two in three day visitors interested in history or culture activities visit historic sites or museums while visiting this region.

History or Culture Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

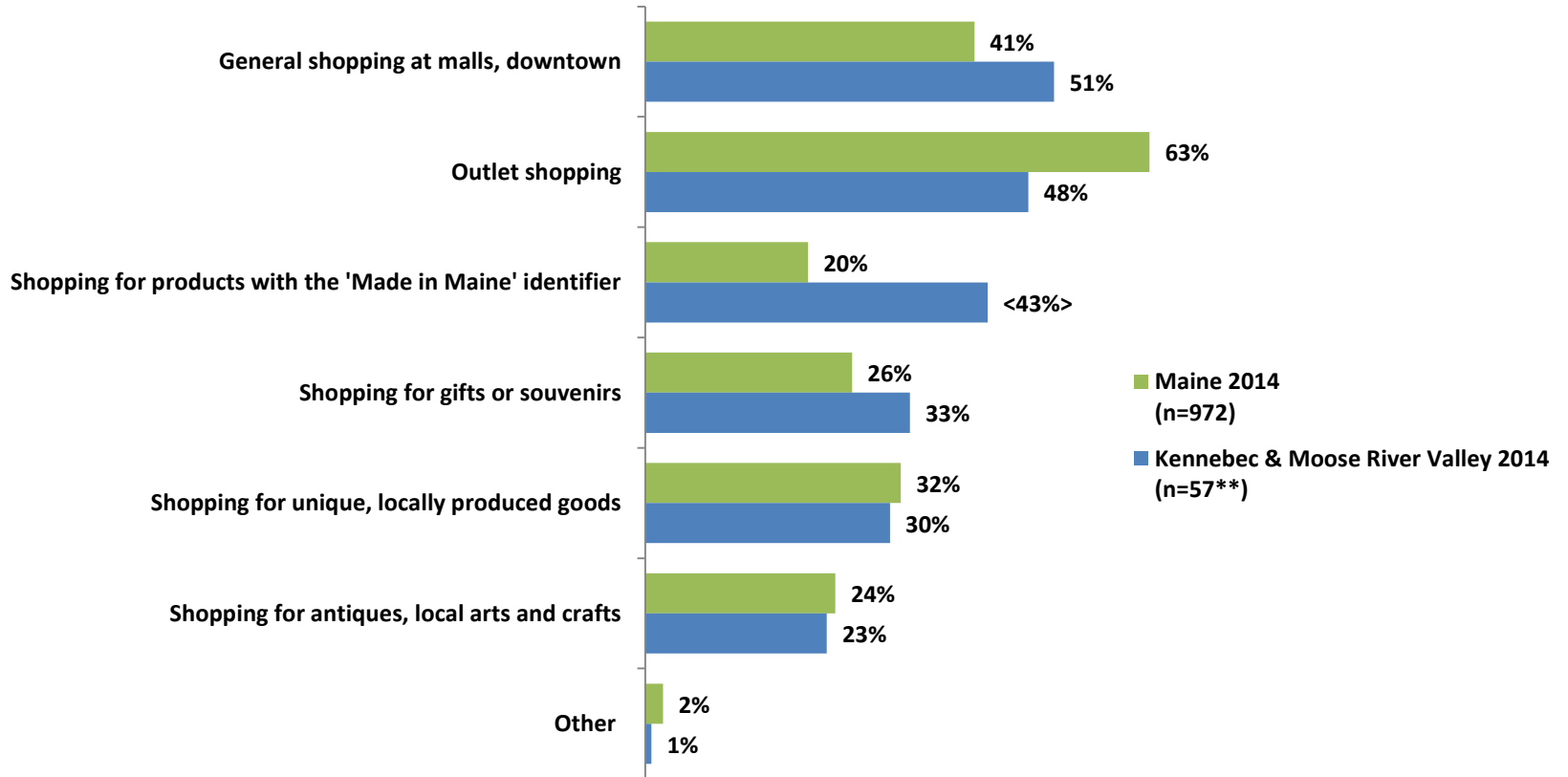
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note very small sample size.

General shopping at malls or downtown and outlet shopping are the most popular shopping activities in the region.

Shopping Activities*

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

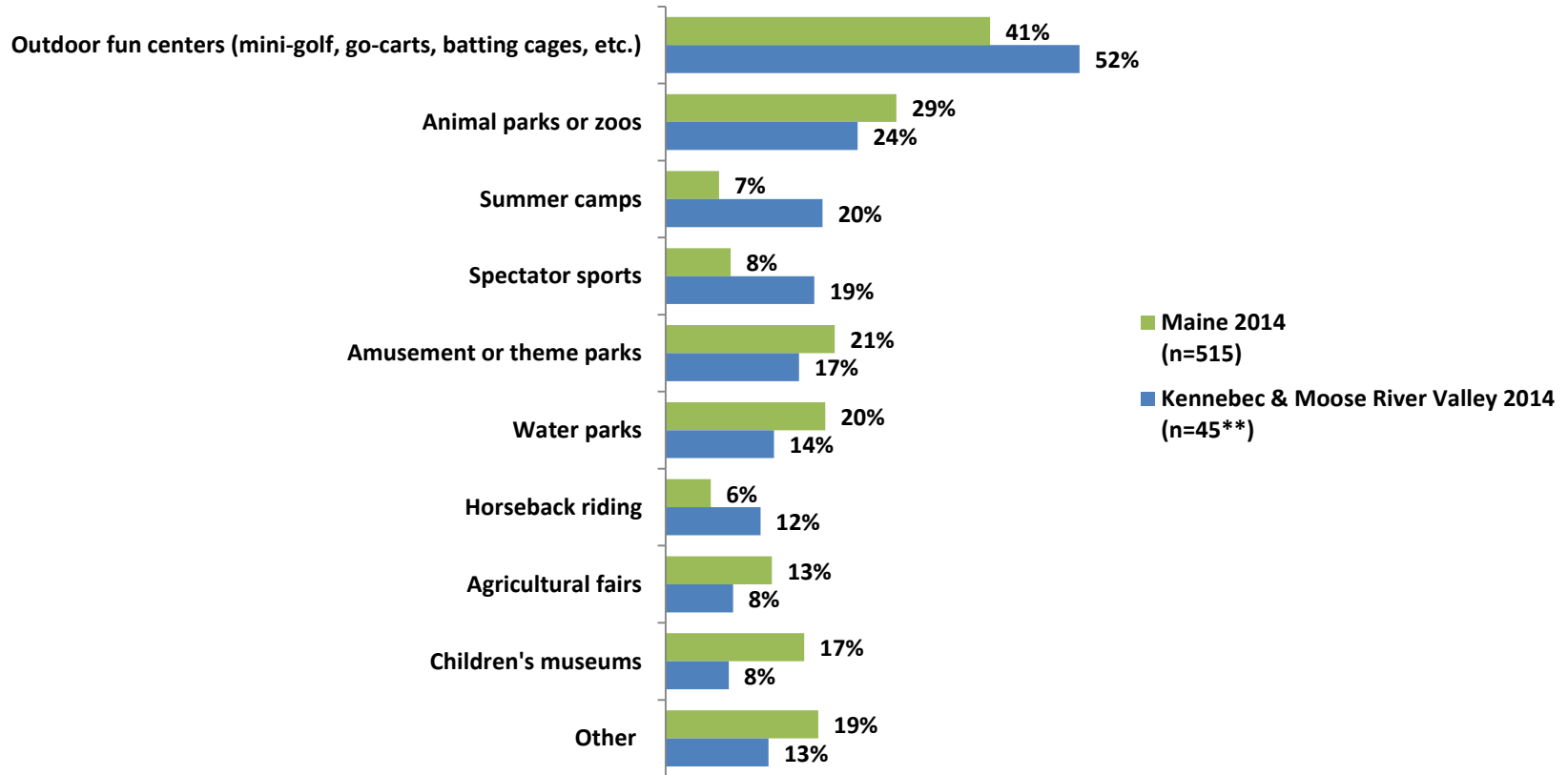
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Half of day visitors to this region who are interested in family fun/children's activities spent time at *outdoor fun centers*.

Family Fun/Children's Activities*

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



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

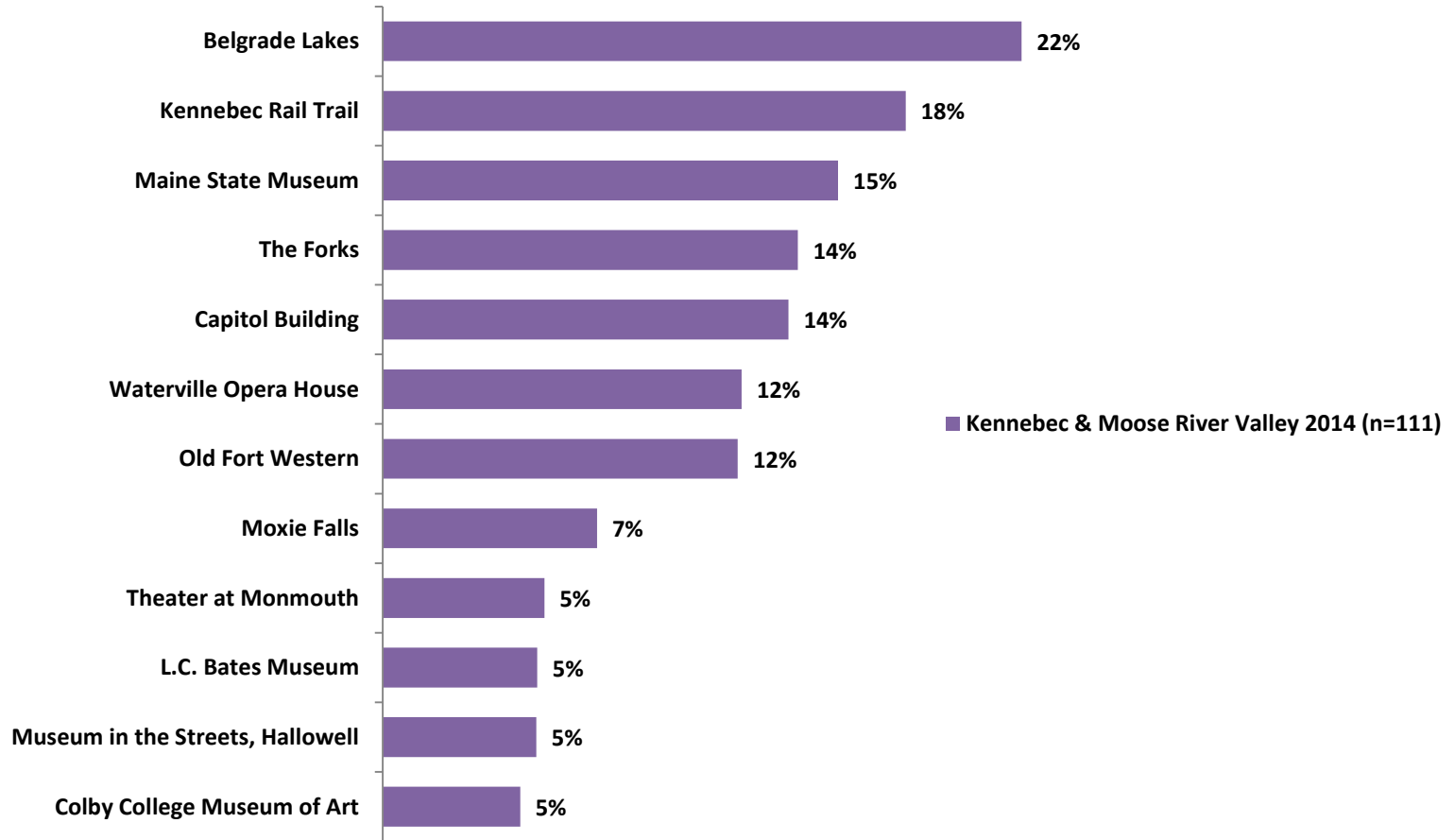
< > indicates a significant difference between subgroups at the 95% confidence level.

*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

One in four day visitors to the Kennebec & Moose River Valley region visits the Belgrade Lakes.

Top Attractions/Locations Visited



Q23: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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



Comparisons: Region vs. State

- Visitors to the Kennebec & Moose River Valley tourism region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in some visitor demographics, visitor origin, their reasons for traveling, and the activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the outdoor and nature-oriented environment available in the Kennebec & Moose River Valley region.
- Highlights – Kennebec & Moose River Valley region vs. State visitors:

Visitor Origin

- **A greater proportion** of overnight and day visitors to the region from **Maine**.

Visitor Demographics

- Day visitors to the region have **lower annual household incomes** and are **less likely to have a college degree**.
- Day visitors to the region travel in **smaller groups**.

Comparisons: Region vs. State

- Highlights Continued:

Trip Interest Areas – Overnight Visitors

- **Less** likely to want to pursue the following interest areas:
 - Food/beverage/culinary activities
 - Touring or sightseeing
- **More** likely to want to pursue **family fun or children’s activities**

Maine Trip Interests and Importance (Importance Index)

Overnight Visitors

- **More** likely to place importance on **water activities**
- **Less** likely to place importance on **touring/sightseeing activities**

Day Visitors

- **More** likely to place importance on **family fun/children’s activities**

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More likely to be:**
 - Fishing
- **Less likely to be:**
 - Enjoying the ocean views or rocky coast
 - Driving for pleasure
 - Eating lobster or other local seafood
 - Going to the beach
 - Exploring State and National Parks
 - General shopping at malls or downtown

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More likely to be:**
 - Shopping for products with the “Made in Maine” identifier
- **Less likely to be:**
 - Enjoying the ocean views or rocky coast
 - Eating lobster or other local seafood



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