

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

Regional Insights: Maine Lakes & Mountains

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 the results among visitors to the **Maine Lakes & Mountains** tourism region during 2014, including:
 - 365 overnight visitors, and
 - 149 day visitors.
- Throughout this report, data for the Maine Lakes & Mountains 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 Maine Lakes & Mountains 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 Maine Lakes & Mountains tourism region are about 43 years old, on average, and have annual household incomes that average around \$104,000. Three-fourths have at least a college degree and 71% are married. Two-thirds are employed full-time.
- Overnight visitors to the Maine Lakes & Mountains on average are younger and are more likely to be employed full-time than visitors to Maine overall.

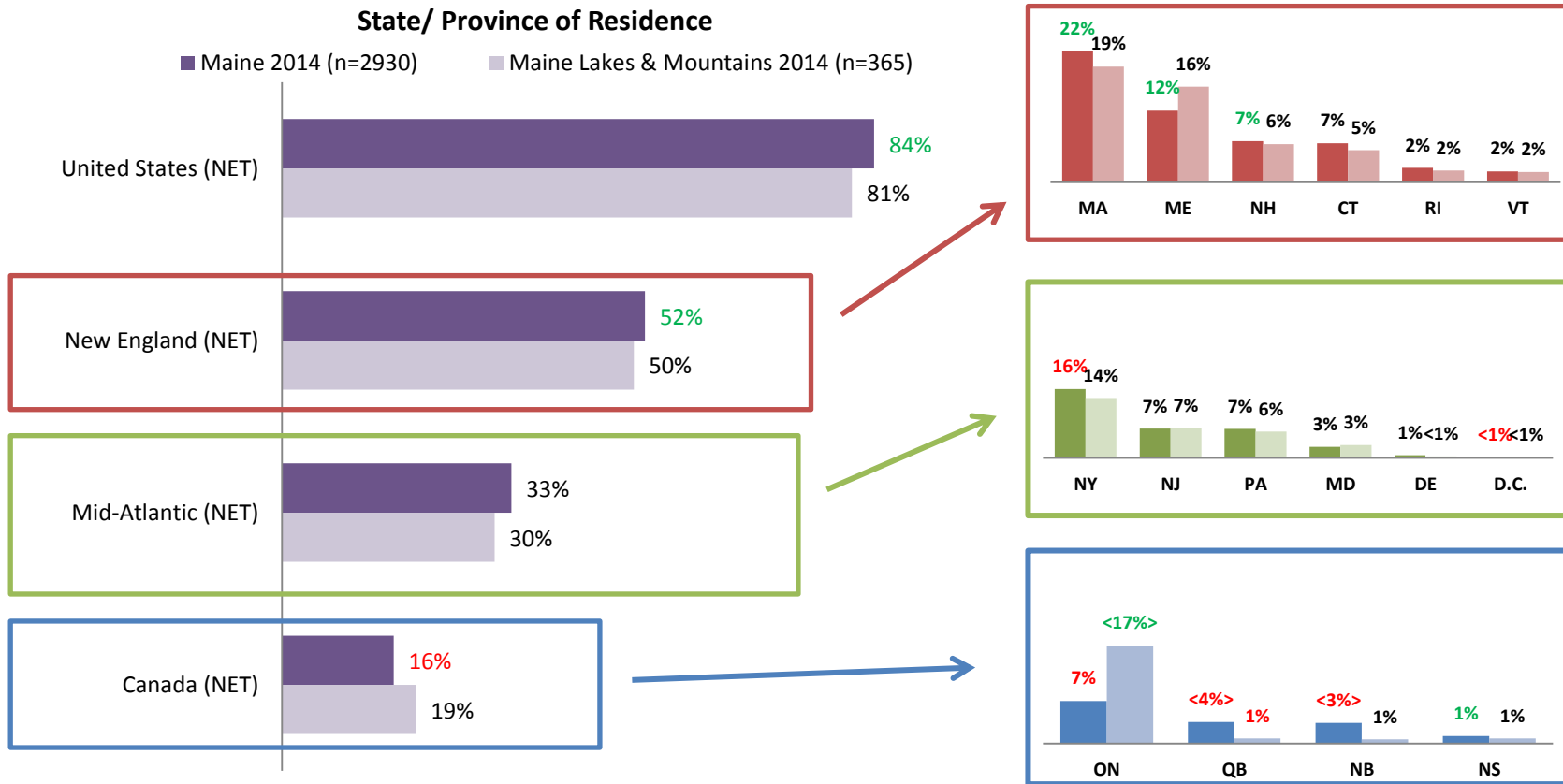
Overnight Visitors	Maine 2014 (n=2930)	Maine Lakes & Mountains 2014 (n=365)
Age:		
< 35	29%	33%
35 - 44	19%	24%
45 - 54	20%	21%
55 +	<32%>	22%
Mean Age (Years)	<45.4>	43.0
Income:		
< \$50,000	16%	16%
\$50,000 - \$99,999	40%	38%
\$100,000 +	44%	46%
Mean Income (Thousands)	\$106,260	\$103,910
Female	54%	50%
College Degree or Higher	74%	74%
Married	66%	71%
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.

Four in five overnight visitors to the Maine Lakes & Mountains region come from the United States.

- The Maine Lakes & Mountains region has a higher proportion of overnight visitors from Ontario than does the State of Maine as a whole.



State/ Province of Residence

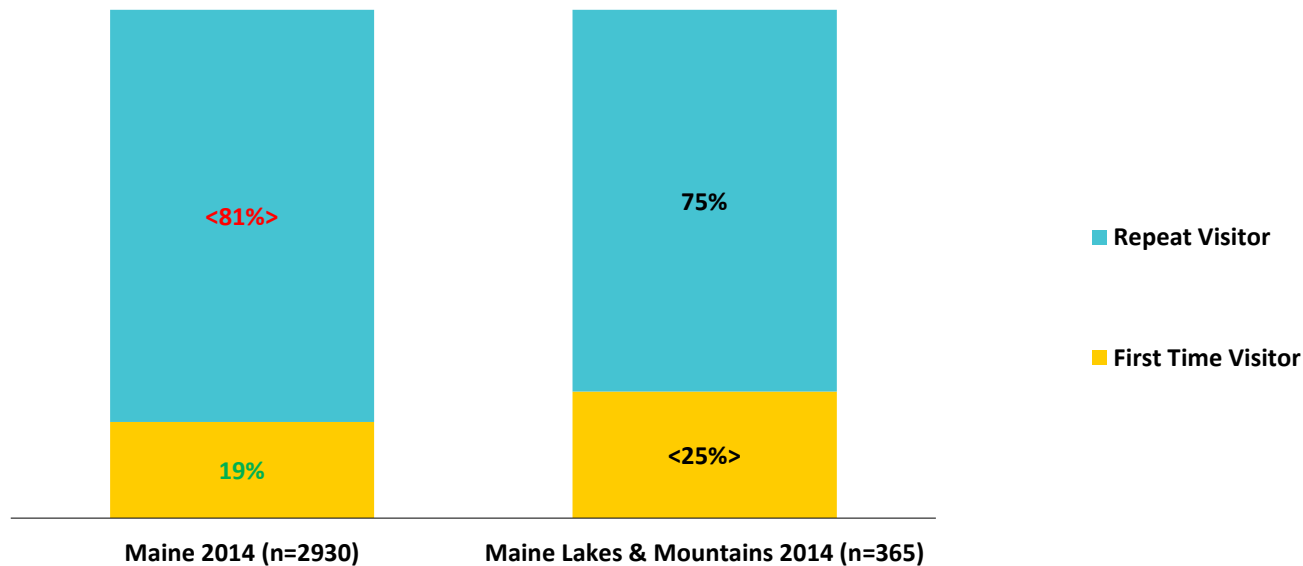
<> indicates a significant difference between subgroups at the 95% confidence level.

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

One in four overnight visitors to the Maine Lakes & Mountains is visiting Maine for the first time.

- Overnight visitors to this region are more likely to be in Maine for the first time than are overnight visitors to the State of Maine as a whole.

Repeat vs. First Time Visitors

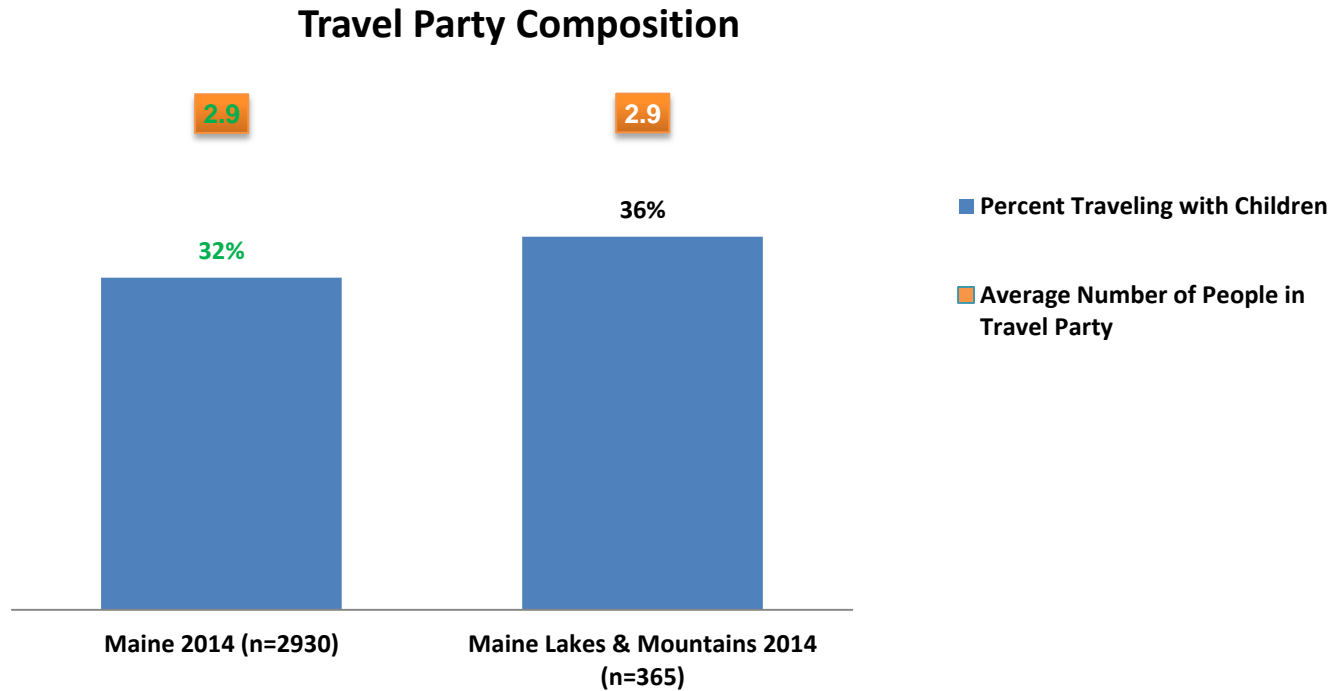


Q11. Was this your first visit in Maine?

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.

One in three overnight visitors to the Lakes & Mountains region is traveling with children.



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?

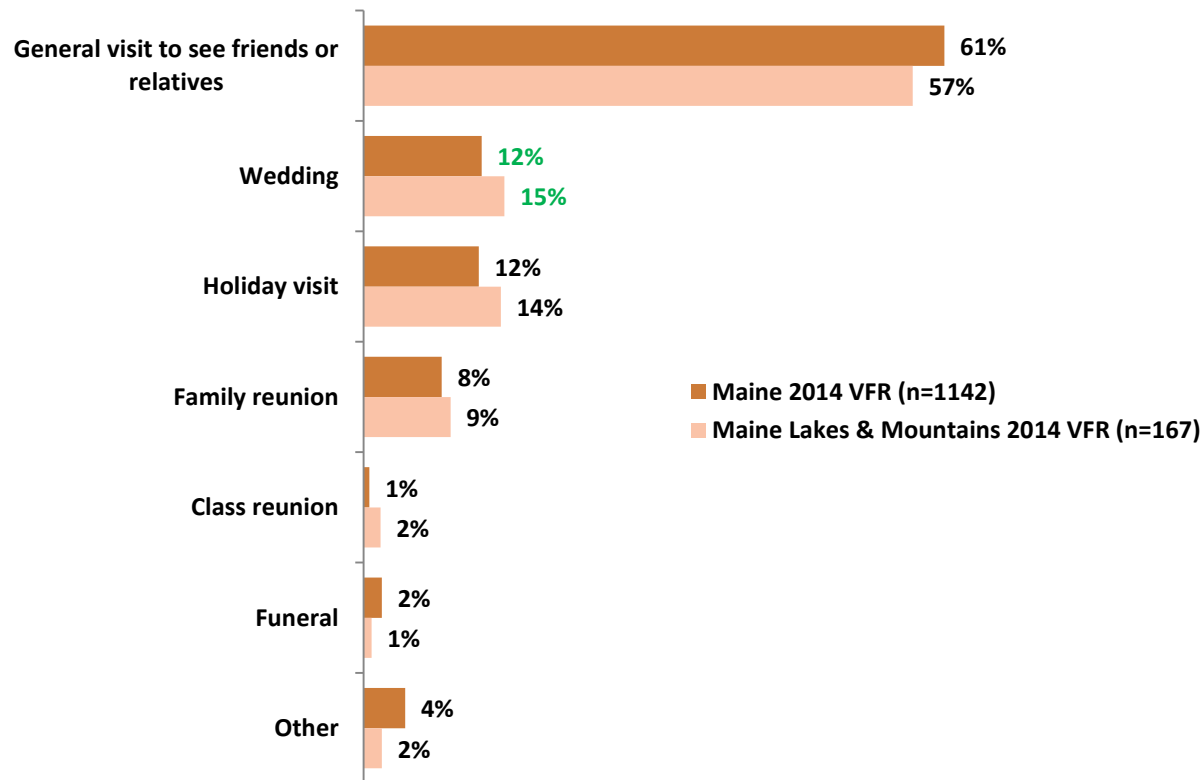
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



Overnight VFR travelers in this region most often cite a *general visit to see friends or relatives* as the primary purpose of their trip.

Primary Purpose of Overnight VFR Trips



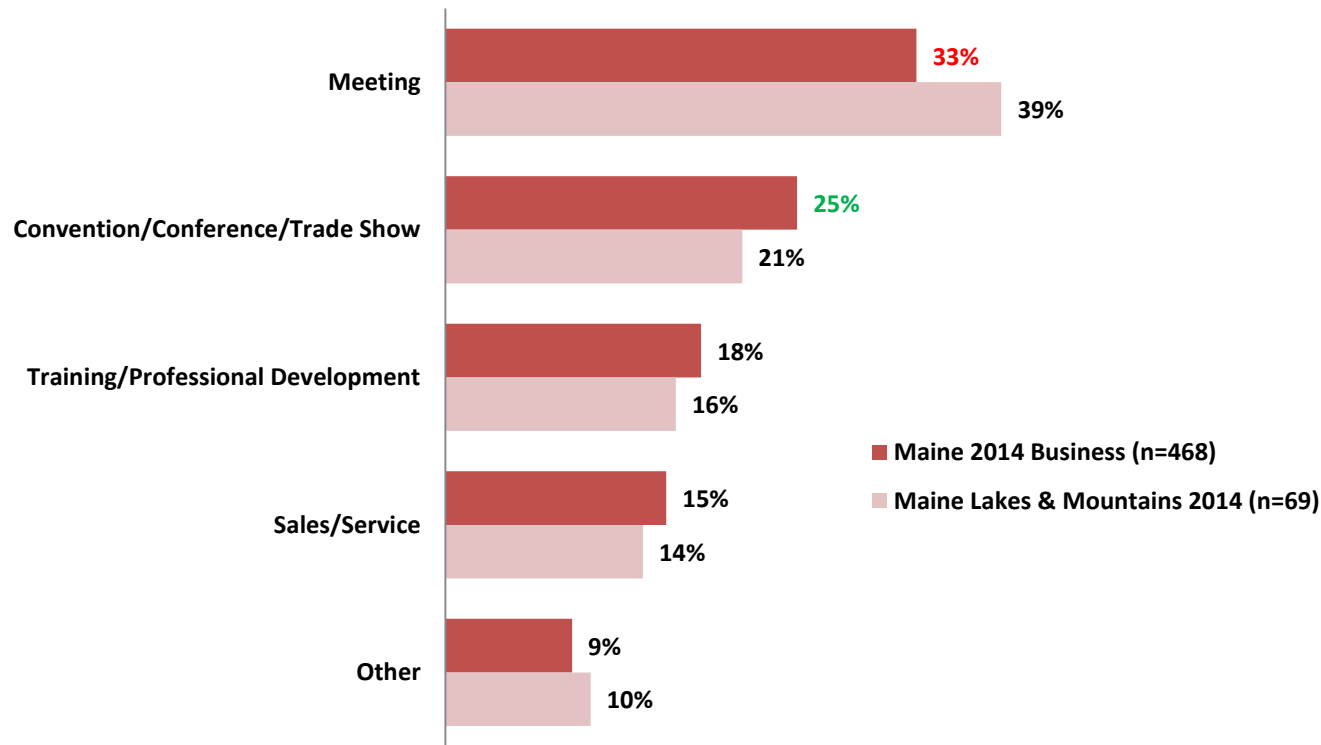
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> 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.

Overnight business trips to the Maine Lakes & Mountains region are most likely for a *general meeting*.

Primary Purpose of Overnight Business Trips



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

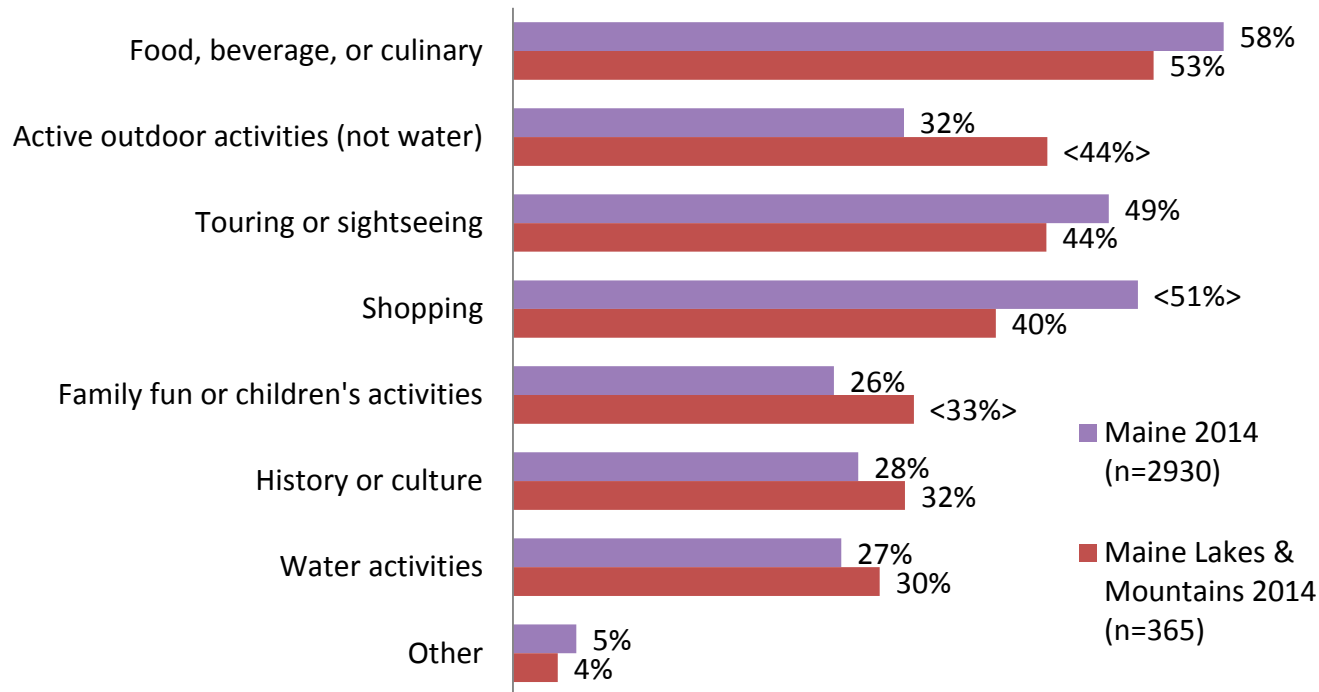
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Food/beverage/culinary interests are the most common travel interest among overnight visitors to the Lakes & Mountains.

- Overnight visitors to the Lakes & Mountains region are more likely to have interest in *active outdoor activities* and *family fun/children's activities* than overnight visitors to the State as a whole. This region's visitors are less likely to be interested in *shopping*.

2014 Interest Areas*



Most Important Interest Area
Maine Lakes & Mountains

Food, beverage, or culinary	27%
Active outdoor activities (not water)	38%
Touring or sightseeing	54%
Shopping	13%
Family fun or children's activities	56%
History or culture	21%
Water activities	39%
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

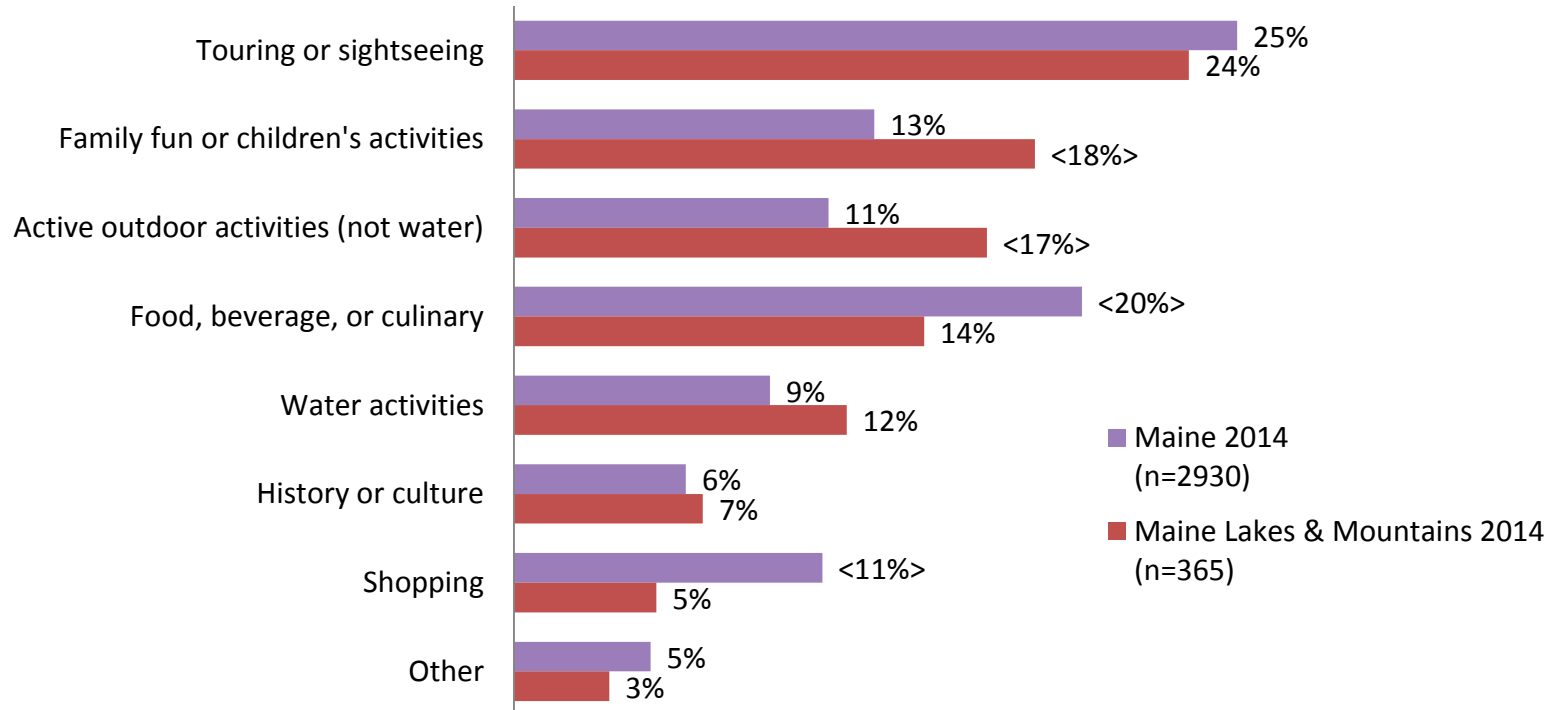
<> indicates a significant difference between subgroups at the 95% confidence level.

*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, touring or sightseeing ranks highest among overnight visitors to this region.

- Some ranked categories for overnight visitors to the Lakes & Mountains region are higher than for the State as a whole – *family fun/children’s activities* and *active outdoor activities*. Categories that are ranked lower for visitors to this region include *food/beverage/culinary* and *shopping*.

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

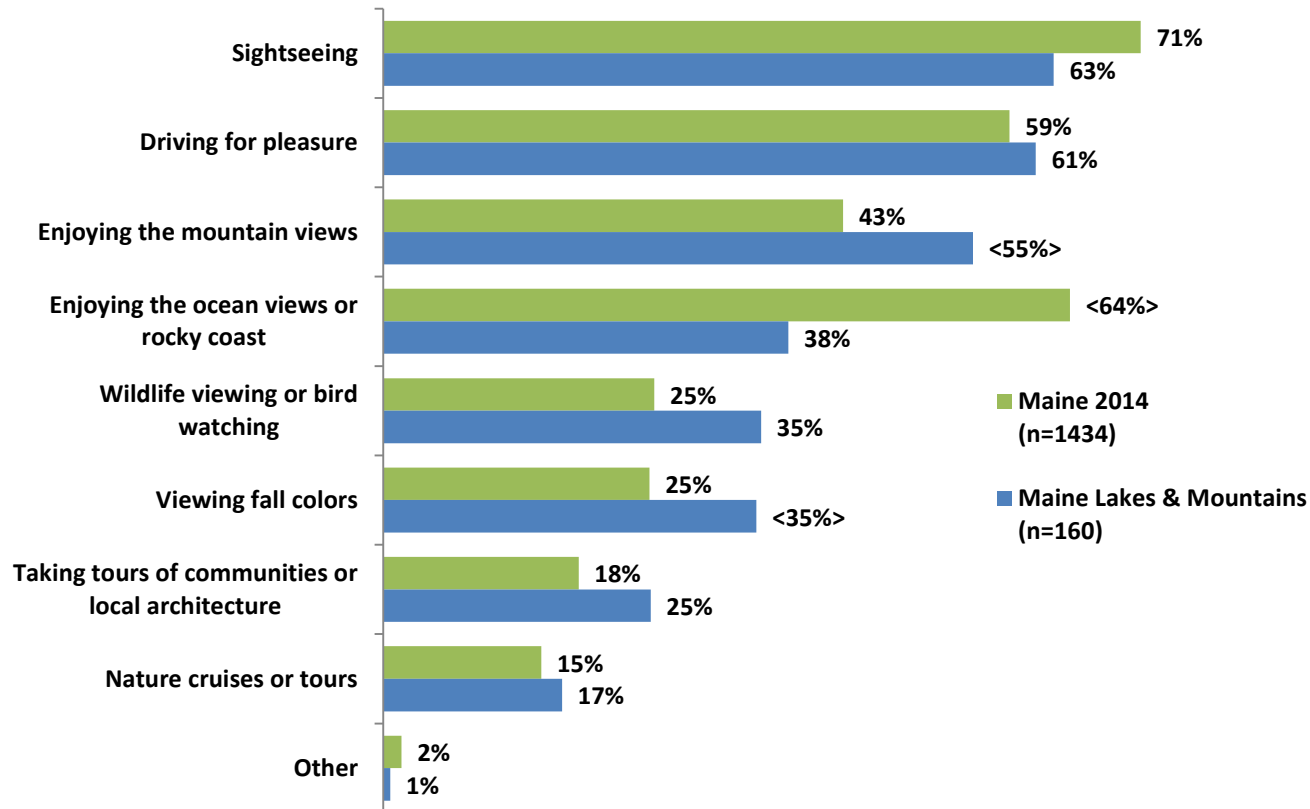
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Sightseeing and driving for pleasure are the most common touring or sightseeing activities among overnight visitors to the region.

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.*

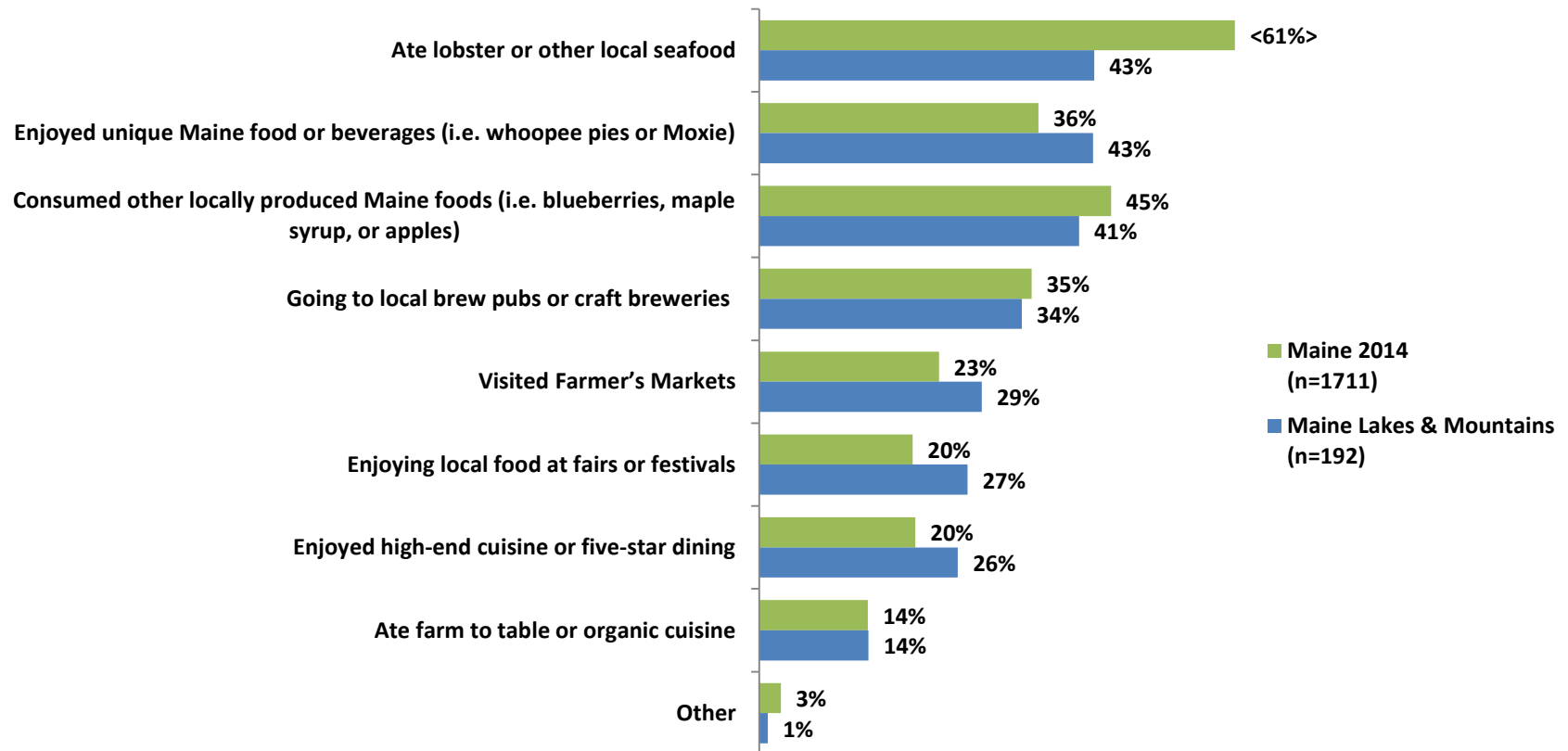
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The top food, beverage, or culinary activities include *eating lobster or other seafood, enjoying unique Maine food or beverages, and consuming other locally produced Maine foods.*

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.

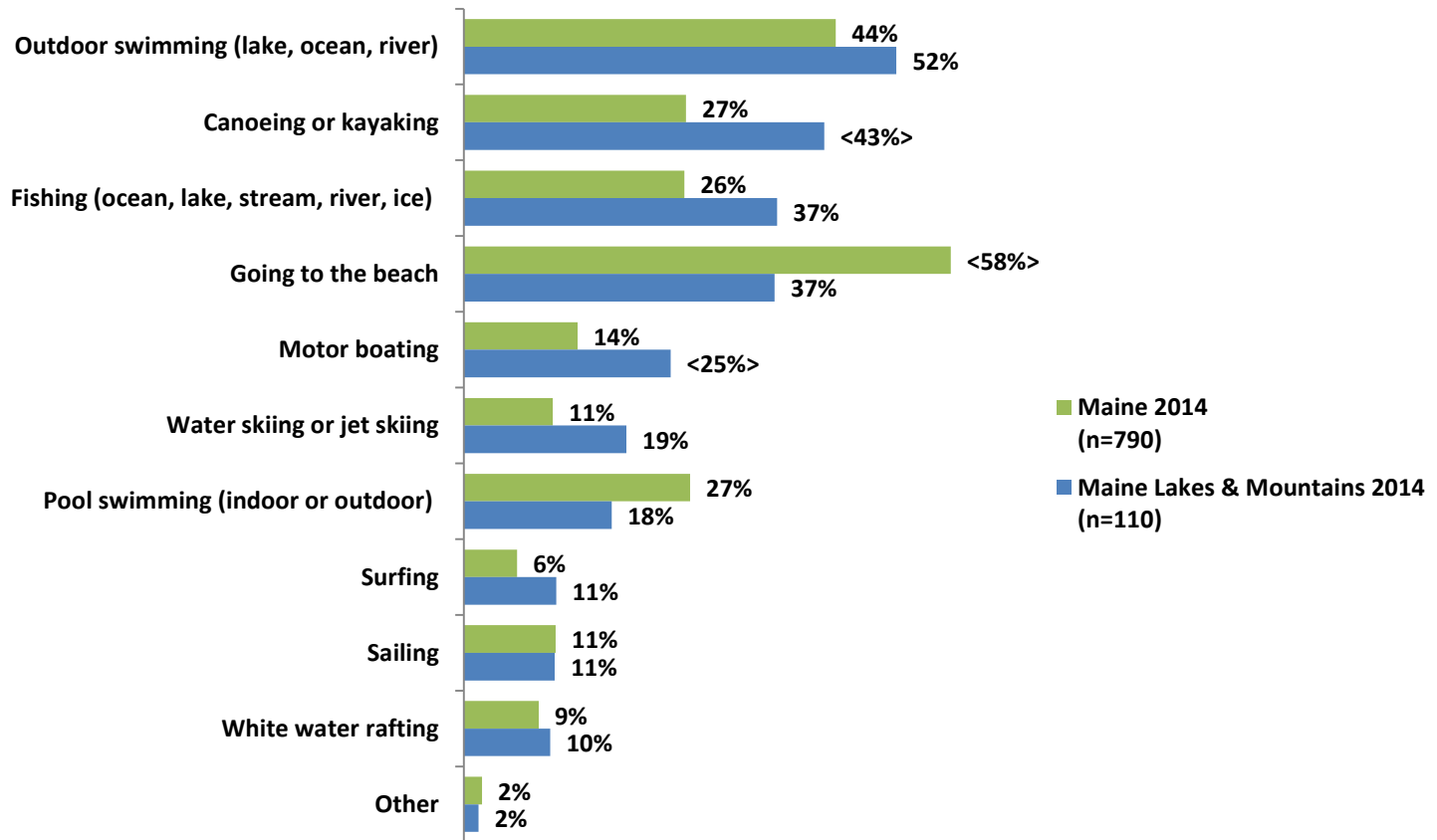
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Outdoor swimming is pursued by half of overnight visitors to the region who are interested in water activities.

- Canoeing or kayaking is more popular in the Lakes & Mountains region, as is *motor boating*, as compared to the State of Maine as a whole. *Going to the beach*, on the other hand, is less popular in this region.

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.

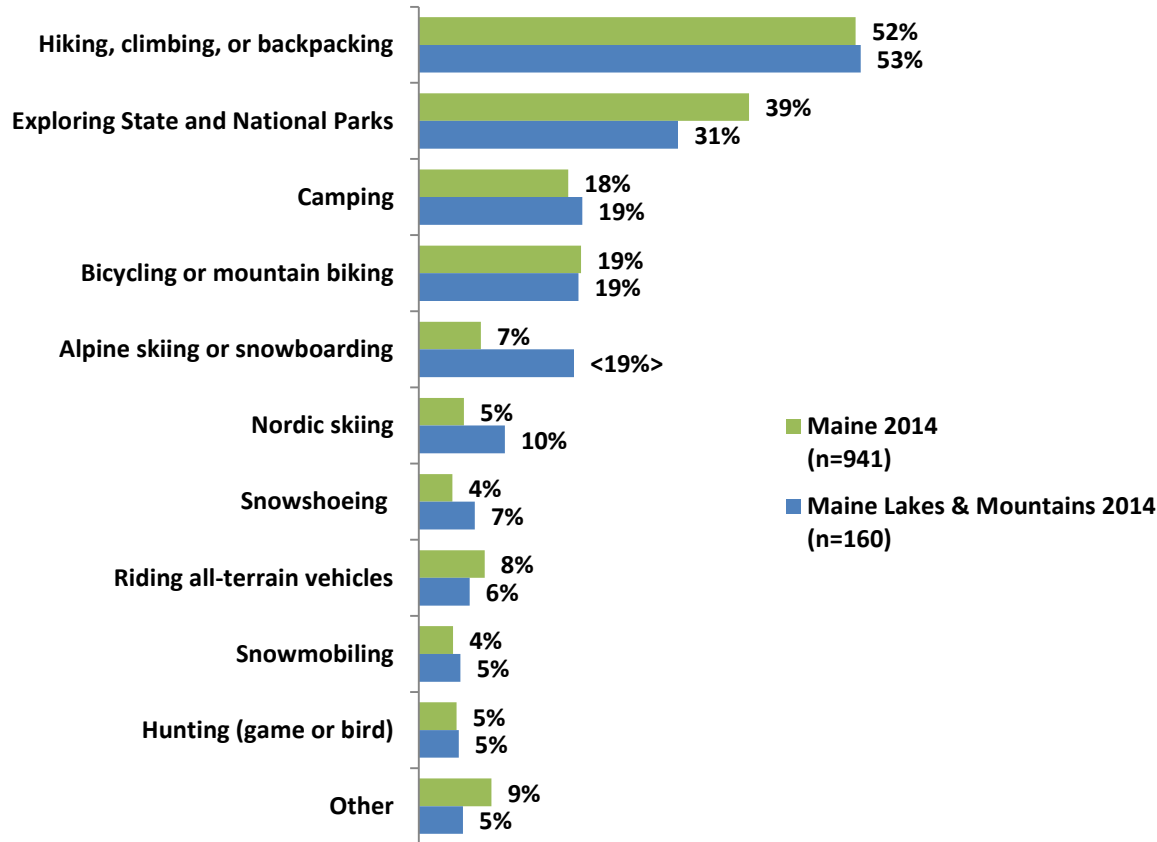
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

Hiking, climbing, or backpacking is the most common activity among overnight visitors interested in active outdoor activities.

- Overnight visitors to the Lakes & Mountains region who are interested in active outdoor activities are more likely to *alpine ski or snowboard* as compared to similar visitors to the State of Maine as a whole.

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.*

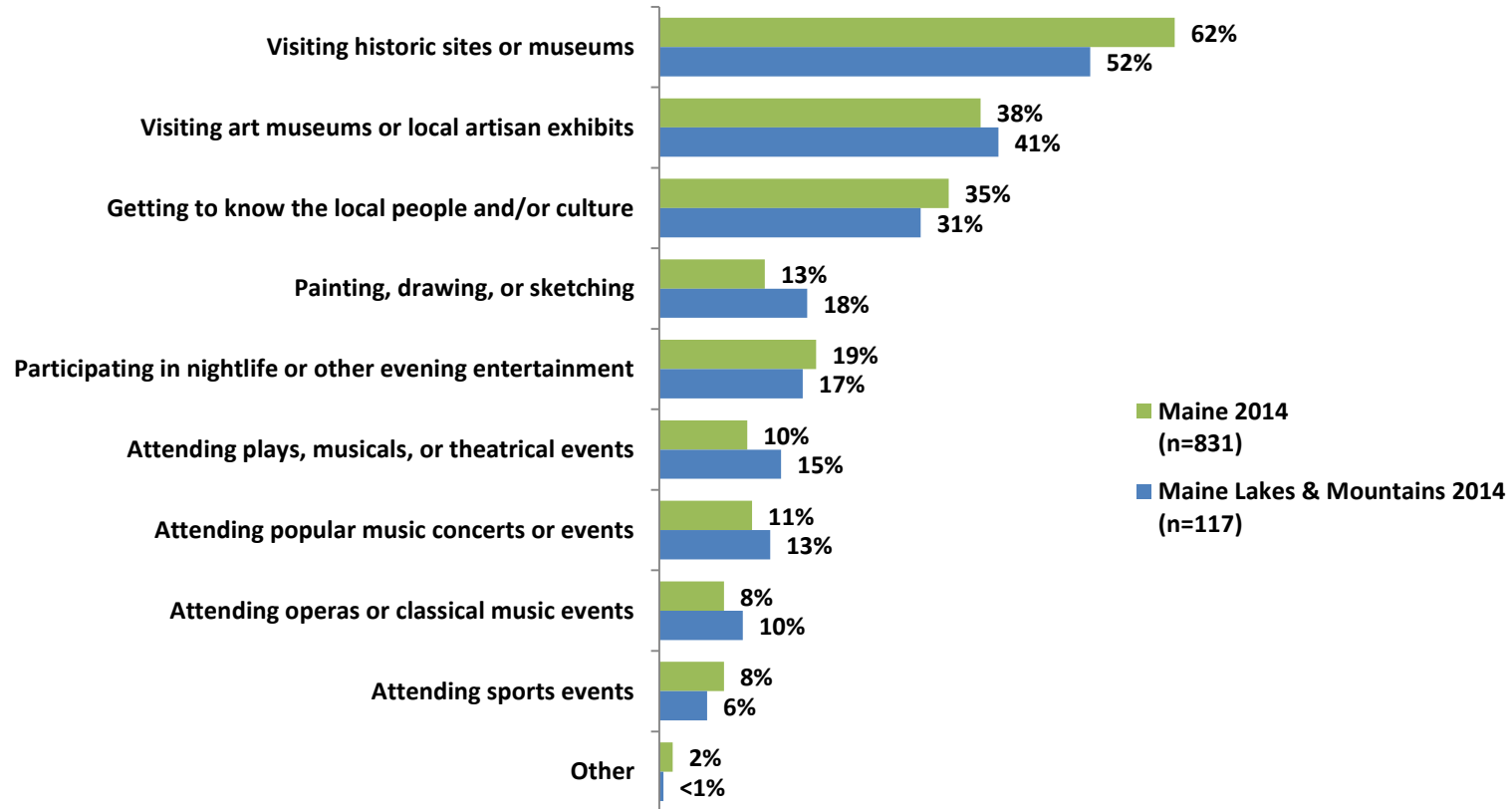
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Half of overnight visitors interested in history or culture activities visit historic sites or museums while in the Lakes & Mountains region.

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.*

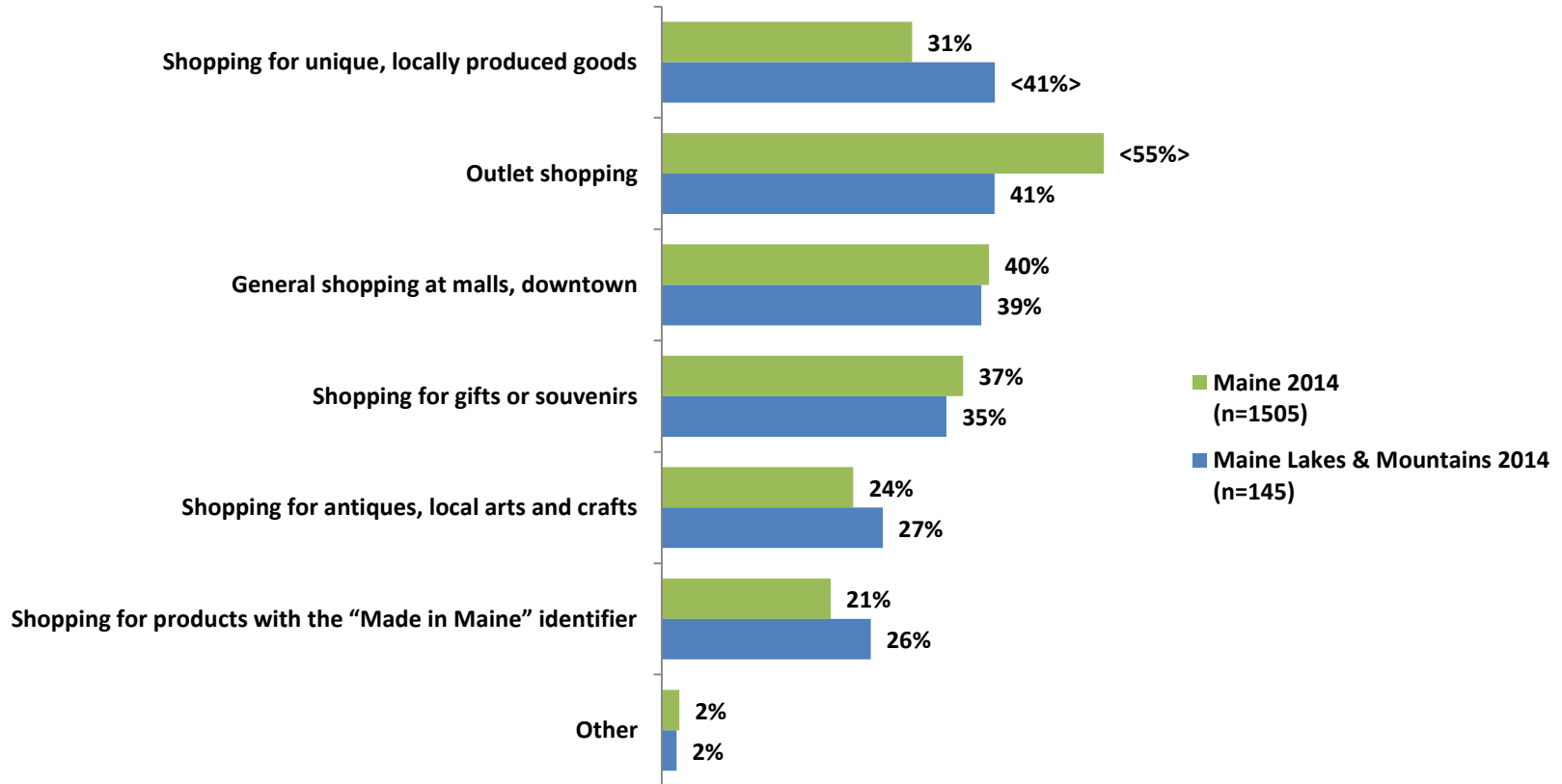
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Overnight visitors to the region who are interested in shopping are most likely to *shop for unique, locally produced goods* or go *outlet 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.*

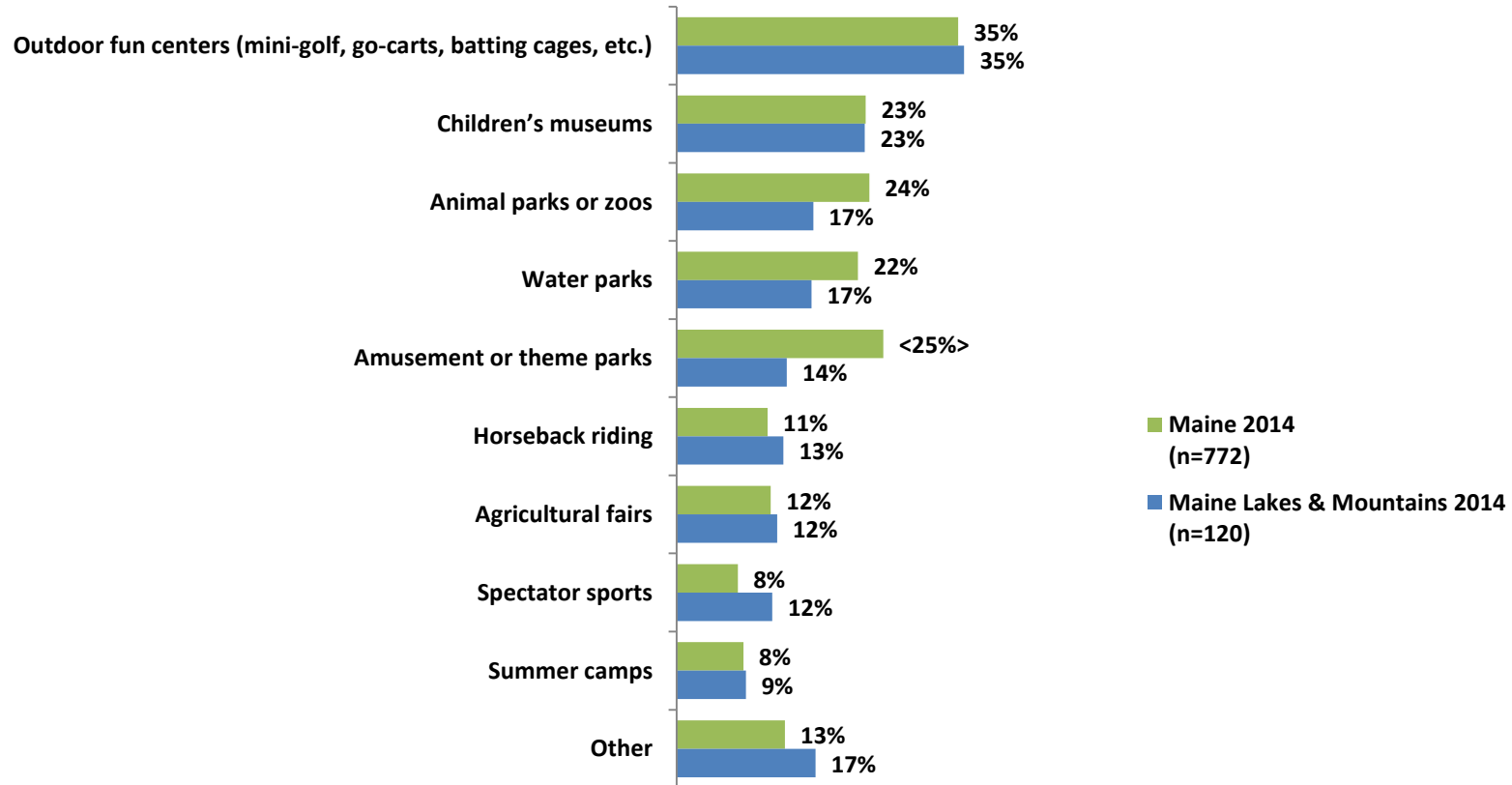
<> indicates a significant difference between subgroups at the 95% confidence level.

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

One in three overnight visitors interested in family fun/children's activities visits an *outdoor fun center* while in this region.

Family Fun/Children's Activities*

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



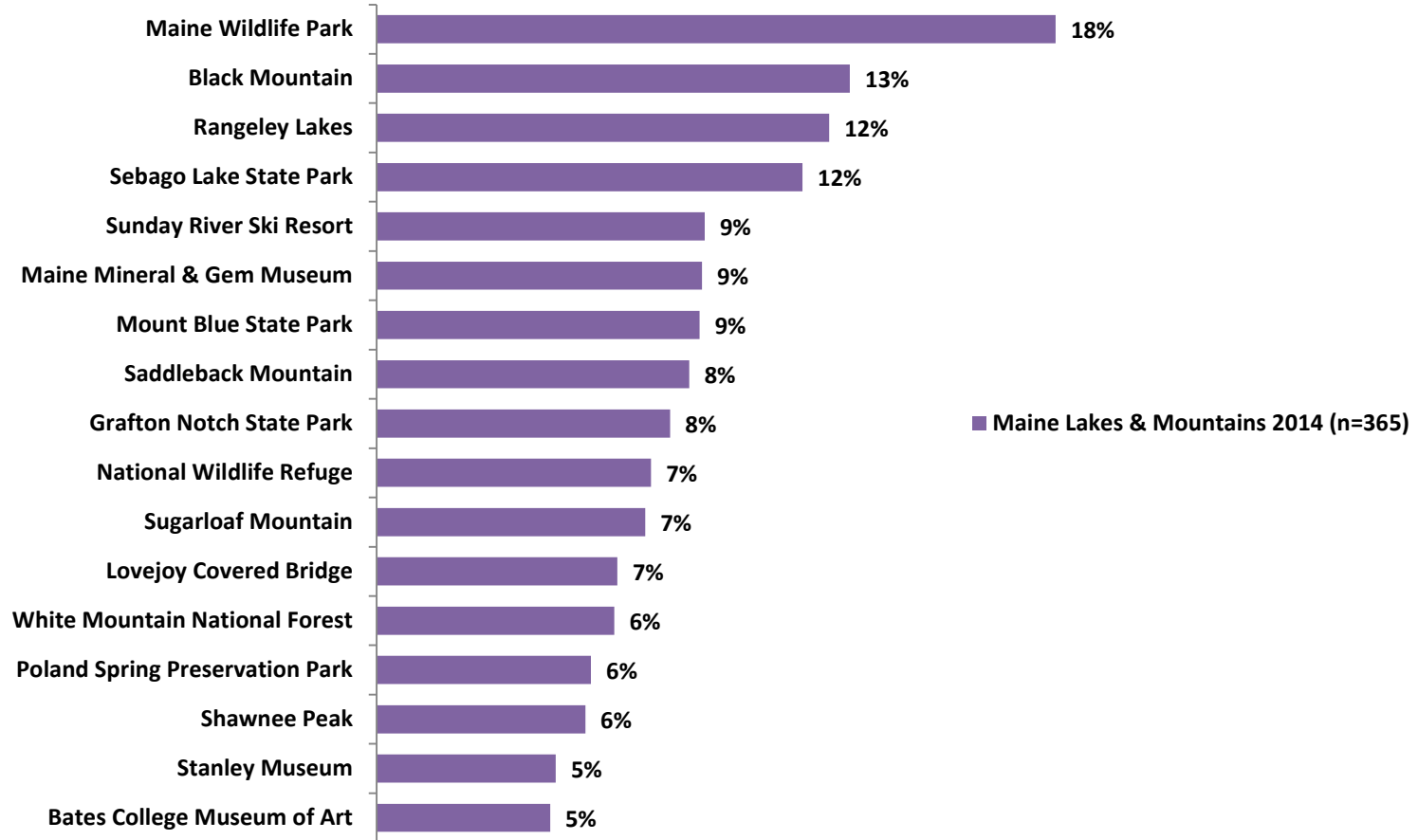
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

One in five overnight visitors to the region visit the Maine Wildlife Park, the most commonly visited attraction in the region.

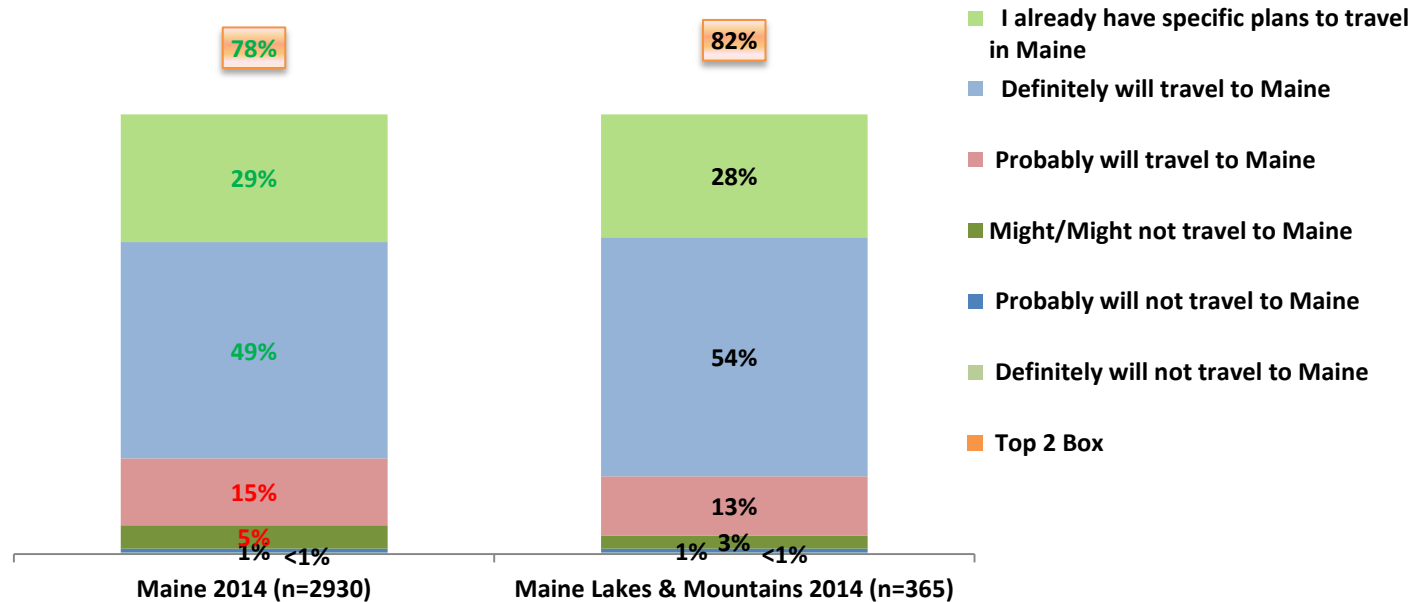
Top Attractions/Locations Visited



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

Eight in ten overnight visitors plan to visit Maine again in the future.

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 Maine Lakes & Mountains region average around 44 years of age, earning just under \$95,000 annually. Almost three in four have a college degree, and 61% are employed full-time. Sixty-two percent are married.
- Day visitors to the Lakes & Mountains tourism region trend younger than Maine day visitors overall.

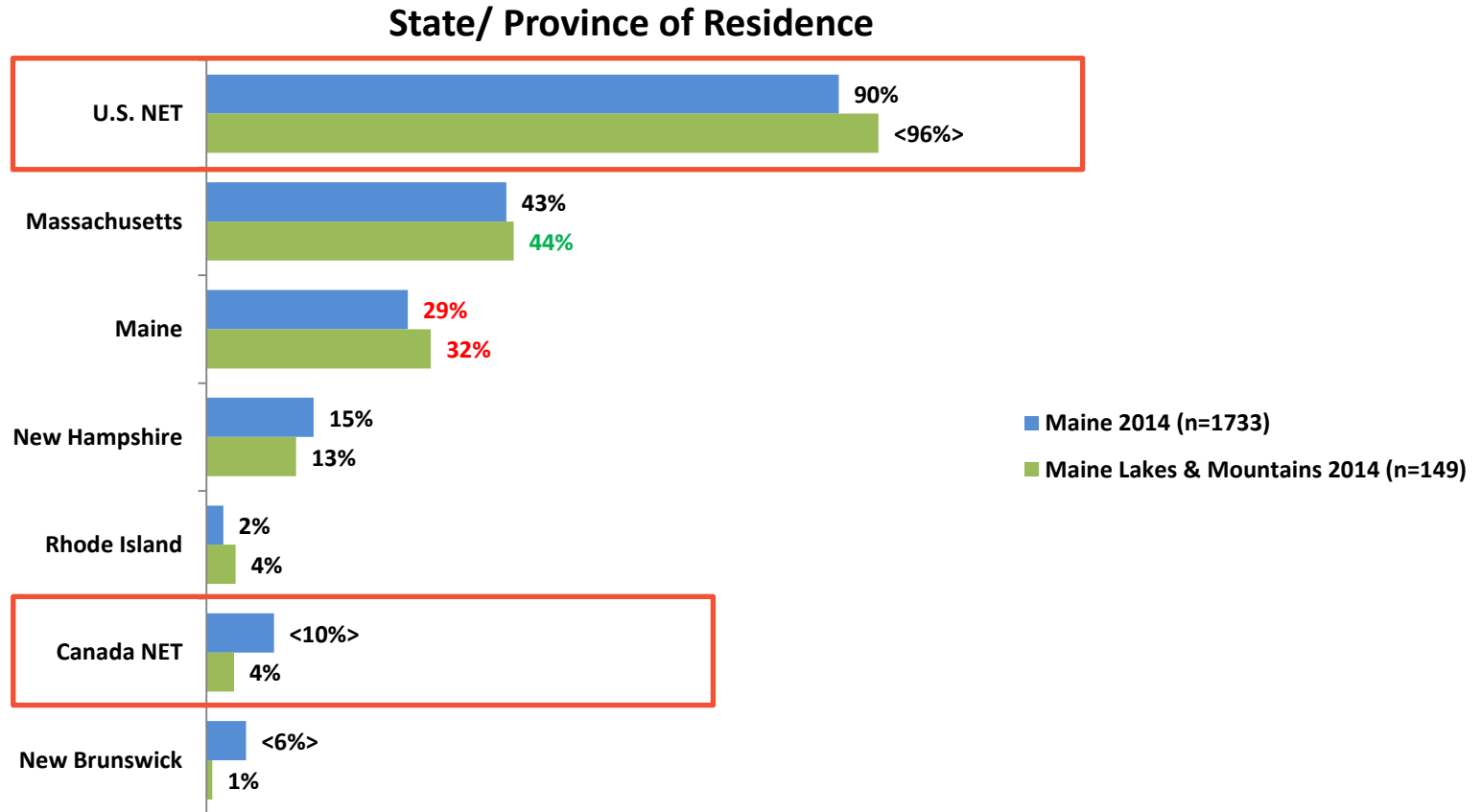
Day Visitors	Maine 2014 (n=1733)	Maine Lakes & Mountains 2014 (n=149)
Age:		
< 35	24%	<35%>
35 - 44	16%	16%
45 - 54	22%	23%
55 +	<38%>	26%
Mean Age (Years)	<47.9>	43.6
Income:		
< \$50,000	22%	23%
\$50,000 - \$99,999	43%	40%
\$100,000 +	36%	36%
Mean Income (Thousands)	\$93,610	\$94,580
Female	56%	51%
College Degree or Higher	69%	71%
Married	64%	62%
Employed Full Time	54%	61%

<> 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.

Massachusetts and Maine contribute three-fourths of the day visitors to the Lakes & Mountains region.

- The Lakes & Mountains region attracts a greater proportion of domestic visitors than does the State of Maine as a whole, and a lesser proportion of Canadian visitors.

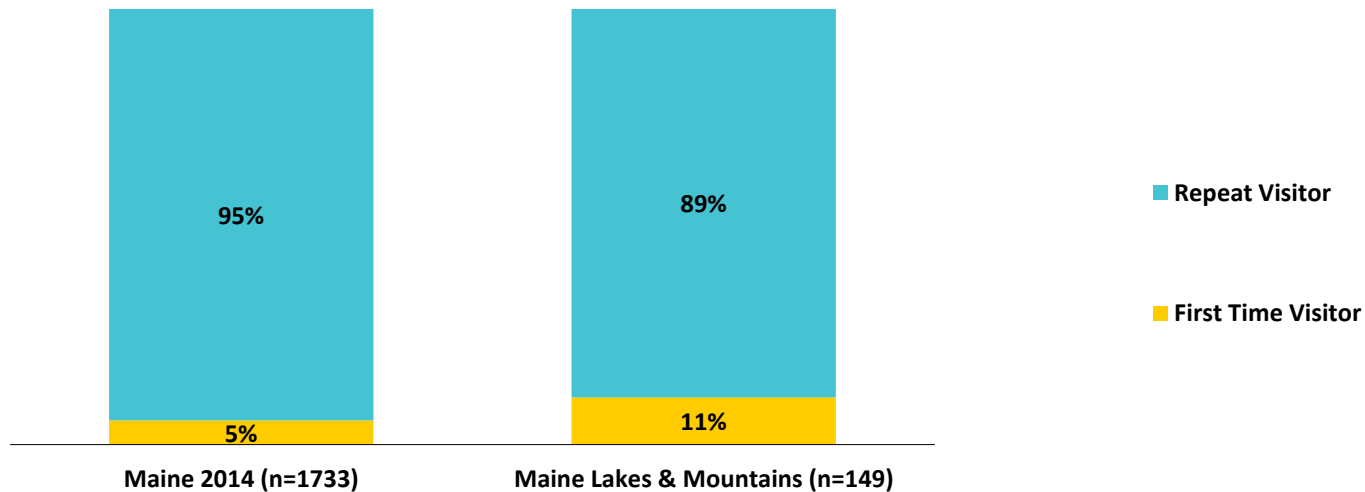


Q2. In what State or Province do you reside?

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 Lakes & Mountains region are repeat visitors to Maine.

Repeat vs. First Time Visitors



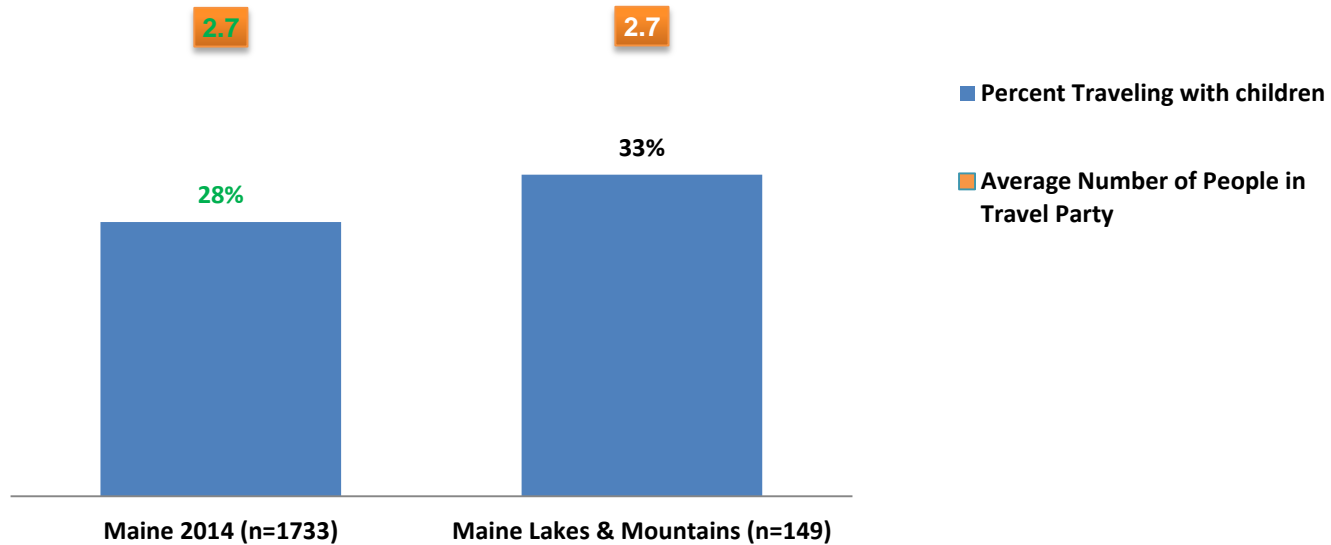
Q10. Was this your first trip to Maine?

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 three visitors to the Lakes & Mountains region is traveling with children.

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

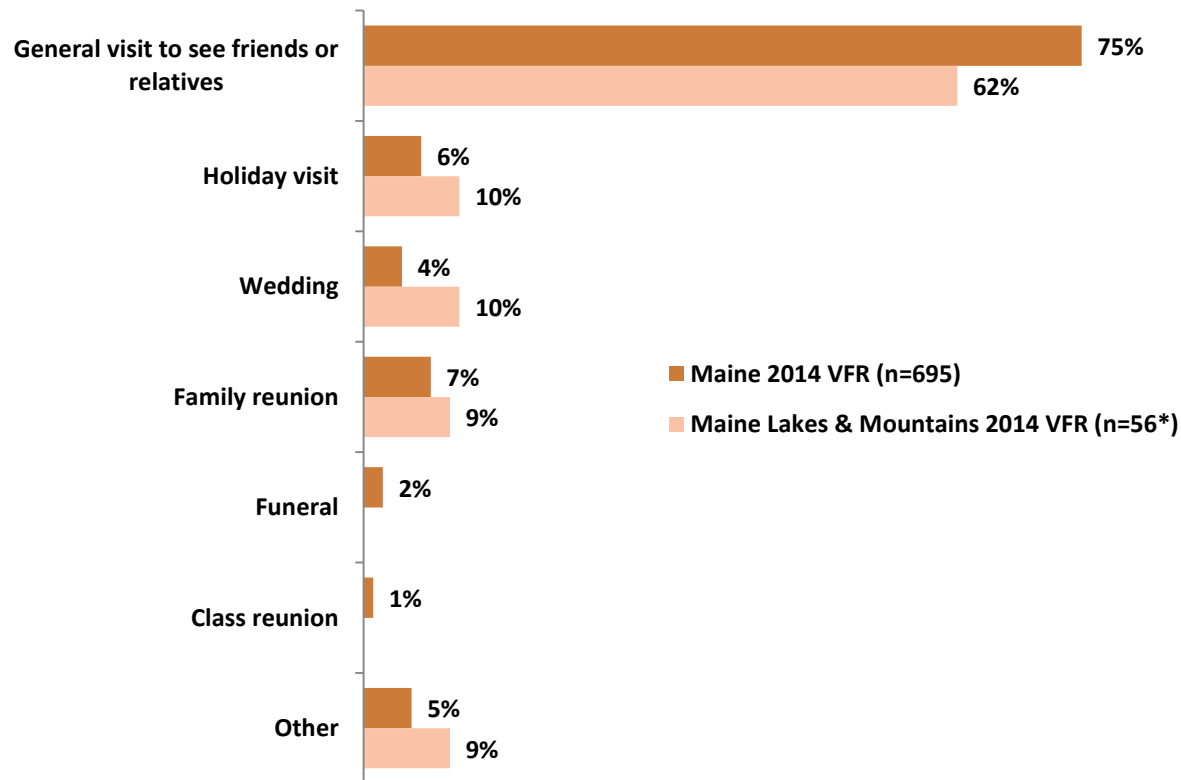
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Two in three VFR day visitors cite a *general visit to see friends or relatives* as the primary purpose of their trip.

Primary Purpose of Day VFR Trips



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

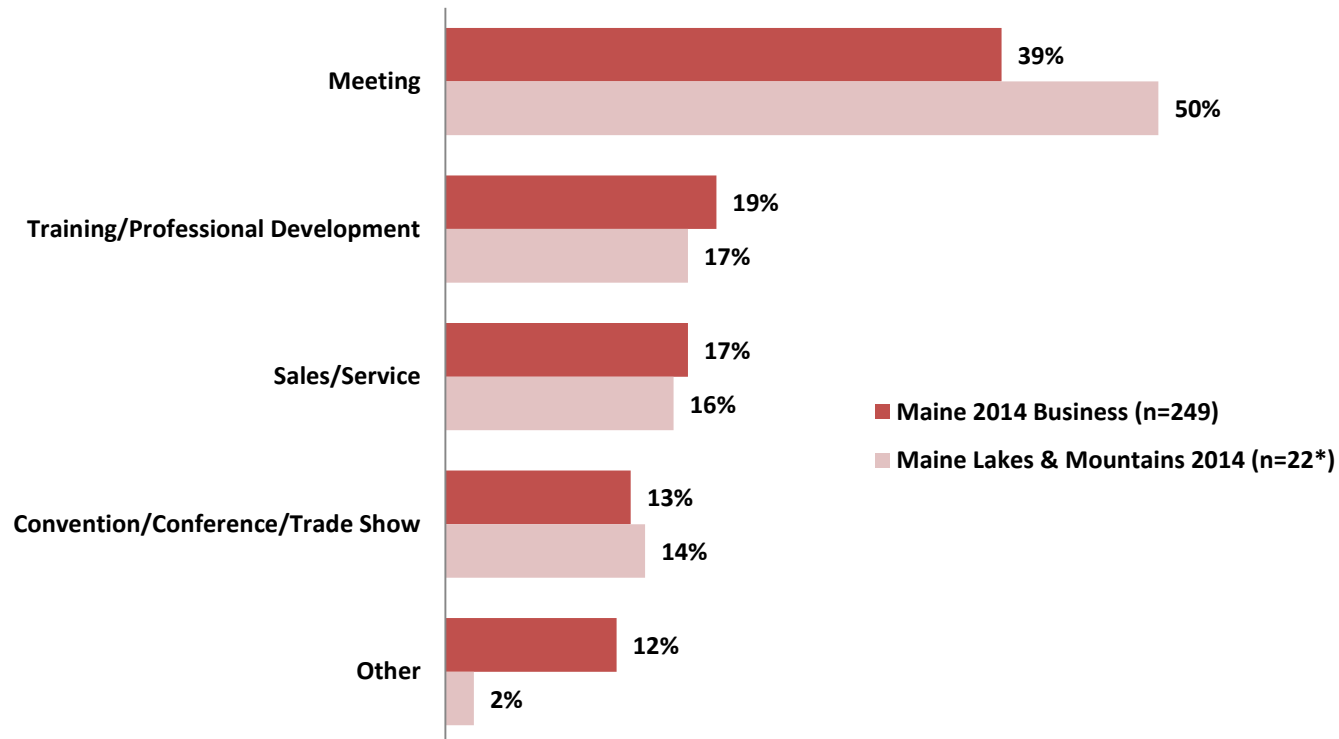
<> indicates a significant difference between subgroups at the 95% confidence level.

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.*

Half of business day trippers visit the Lakes & Mountains region primarily to attend a *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.

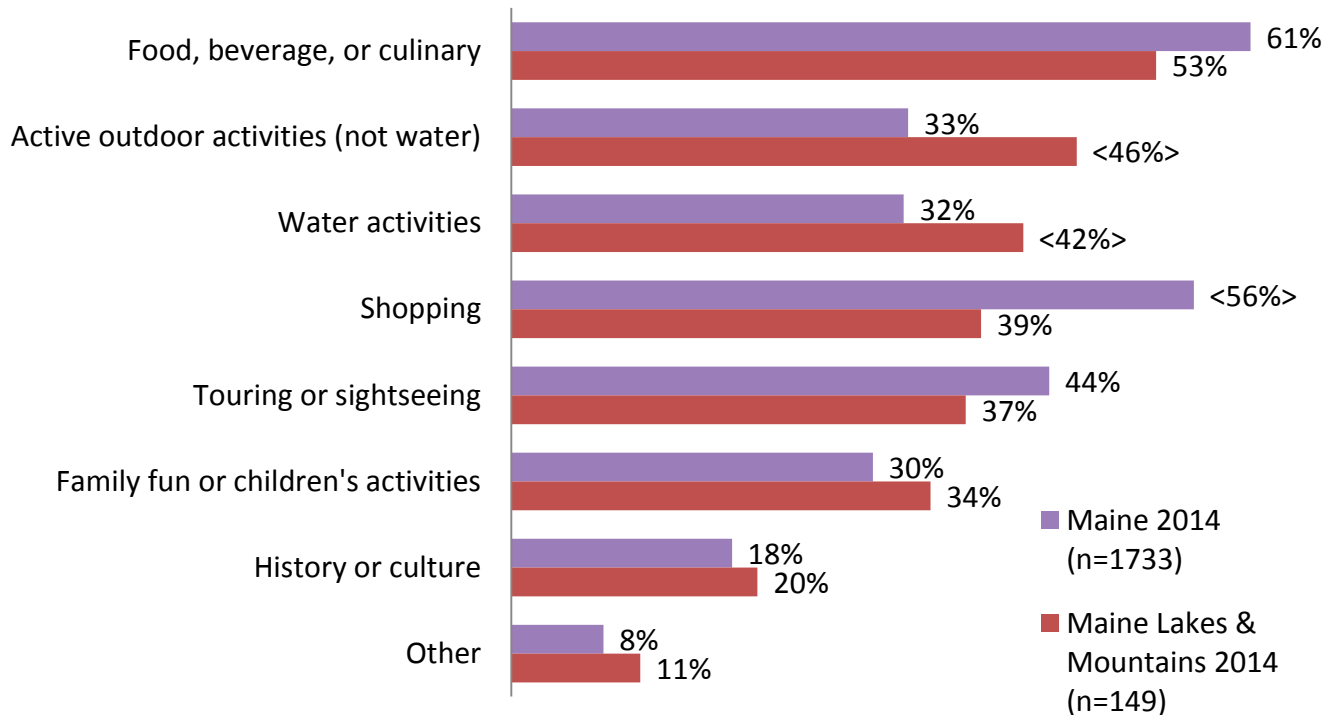
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

**Please note very small sample size.*

Day visitors to the region are most likely to want to pursue *food, beverage, or culinary interests and active outdoor activities*.

- Interest areas of day visitors to the Lakes & Mountains differ somewhat from interest areas of day visitors to the State of Maine overall. Lakes & Mountains visitors are more likely to be interested in *active outdoor activities* and *water activities*, and less likely to be interested in *shopping*.

2014 Interest Areas*



Most Important Interest Area Maine Lakes & Mountains	
Food, beverage, or culinary	15%
Active outdoor activities (not water)	54%
Water activities	32%
Shopping	14%
Touring or sightseeing	42%
Family fun or children's activities	47%
History or culture	31%
Other	96%

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

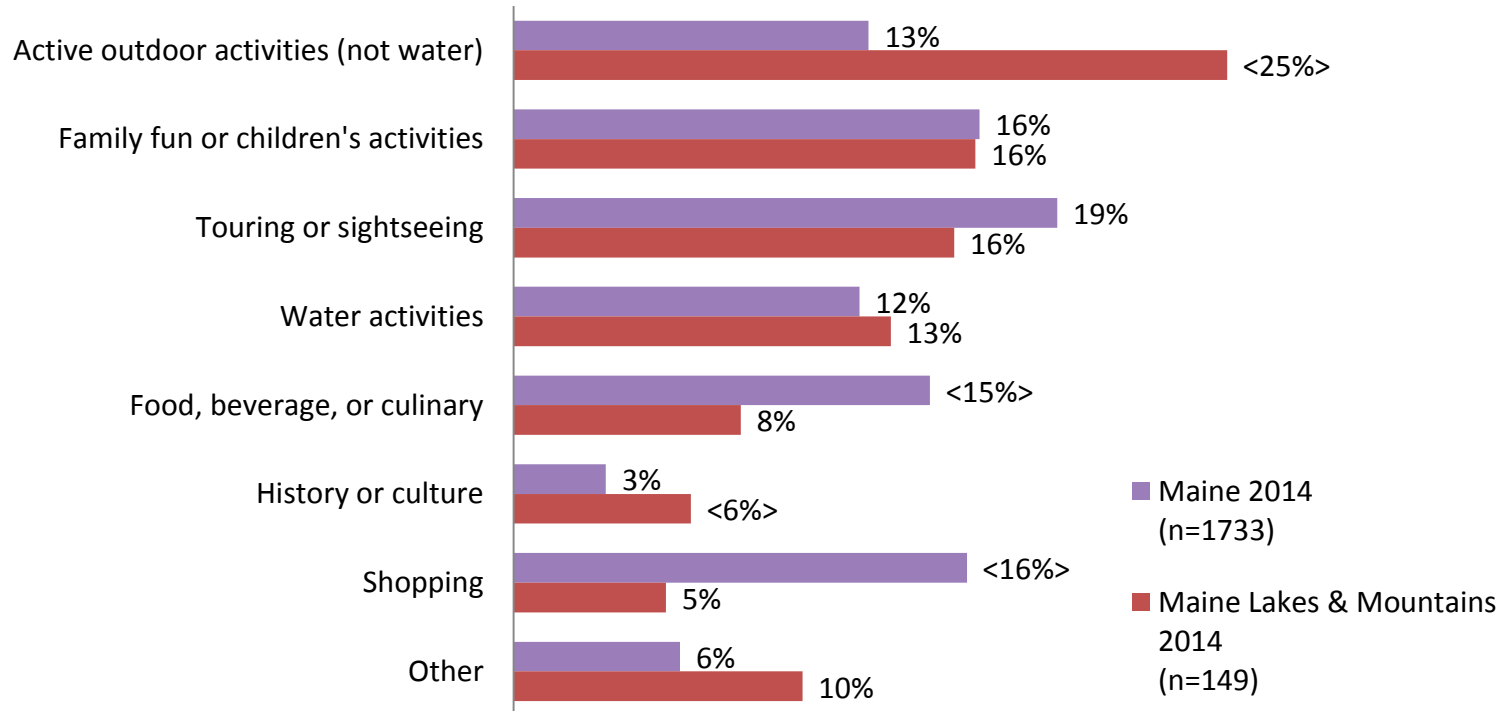
<> indicates a significant difference between subgroups at the 95% confidence level.

*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, *active outdoor activities* rank highest among day visitors to the Lakes & Mountains.

- Similar to Lakes & Mountains overnight visitors, day visitors place more importance on *active outdoor activities* and less importance on *food/beverage/culinary* and *shopping* interest areas than day visitors to the State of Maine as a whole.

2014 Interest Areas*
Importance Index



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

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. 34

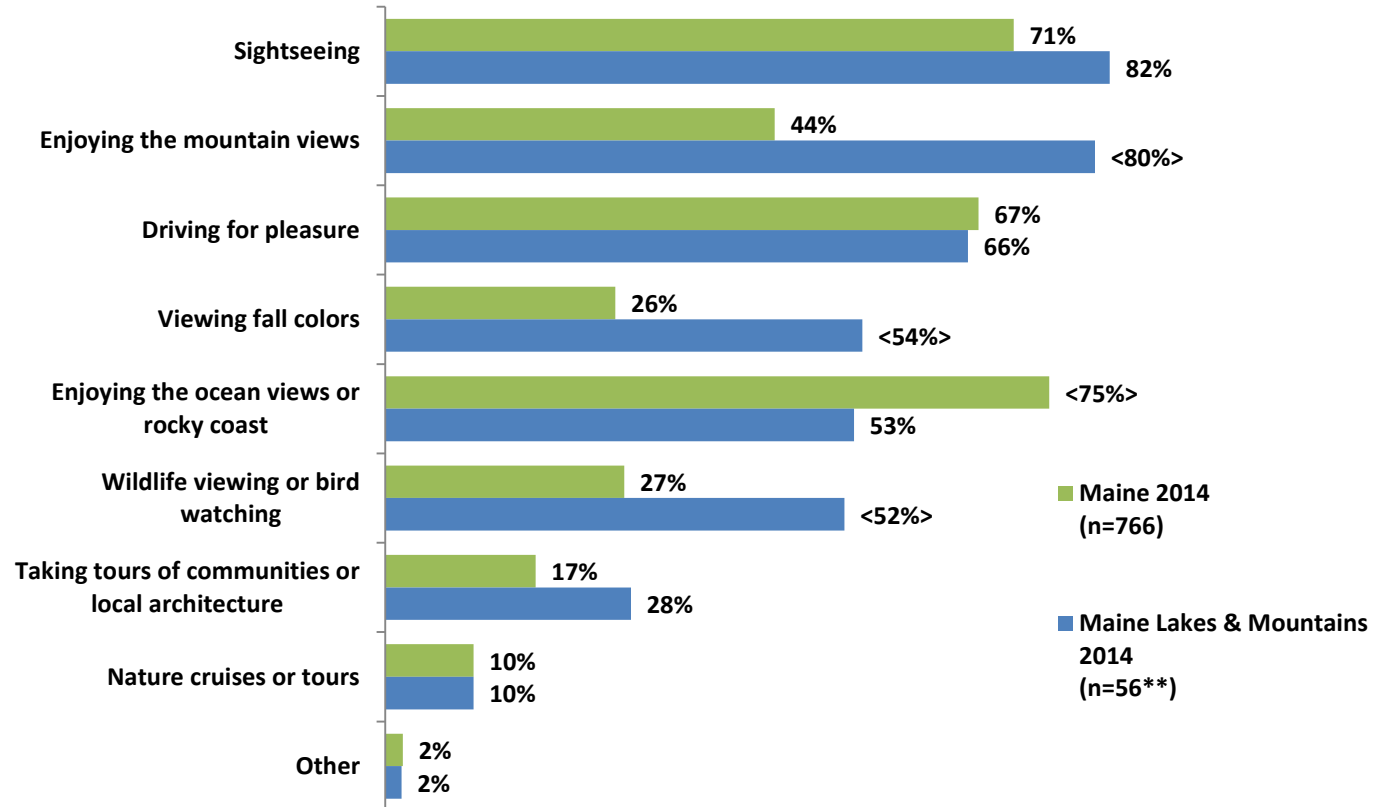
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Sightseeing and enjoying the mountain views are the most common touring/sightseeing activities among day visitors to the region.

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.

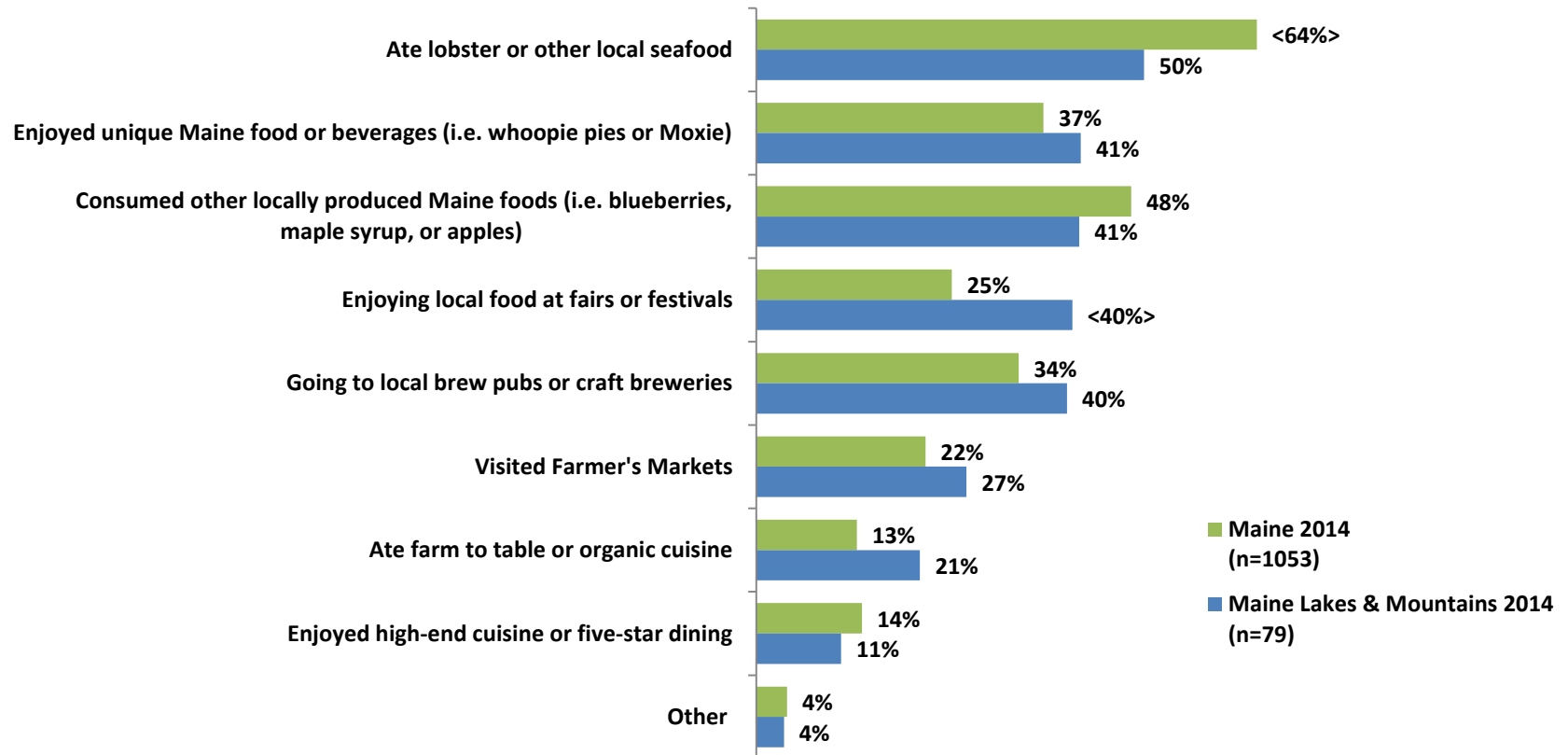
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Half of all day visitors interested in food/beverage/culinary activities *ate lobster or other local seafood* while visiting the region.

Food, Beverage, or Culinary Activities*

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



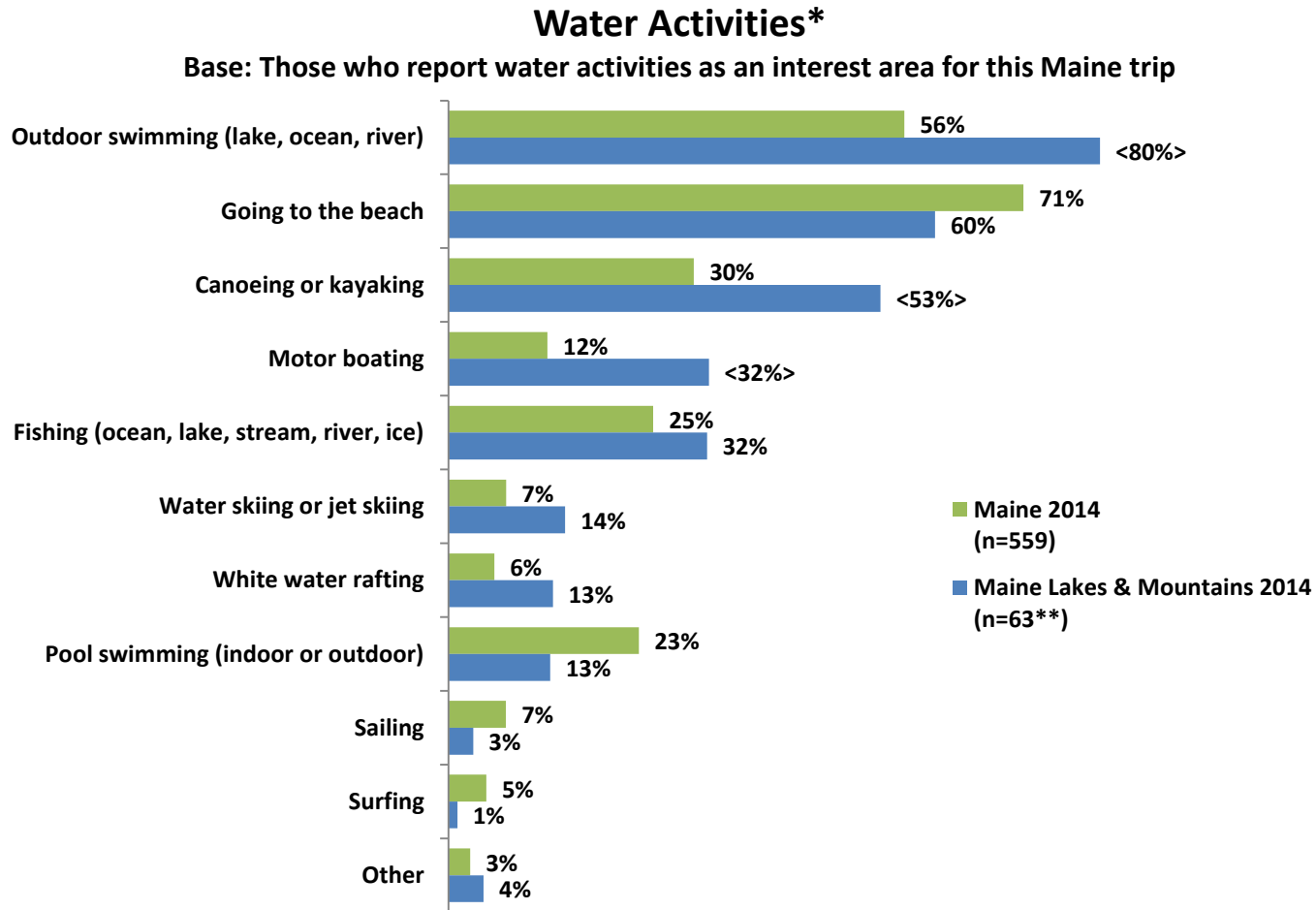
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

Four in five day visitors to this region participate in *outdoor swimming*, by far the most popular water activity.

- Outdoor swimming, canoeing/kayaking, and motor boating are all more popular among Lakes & Mountains day visitors than among day visitors to Maine as a whole.



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.

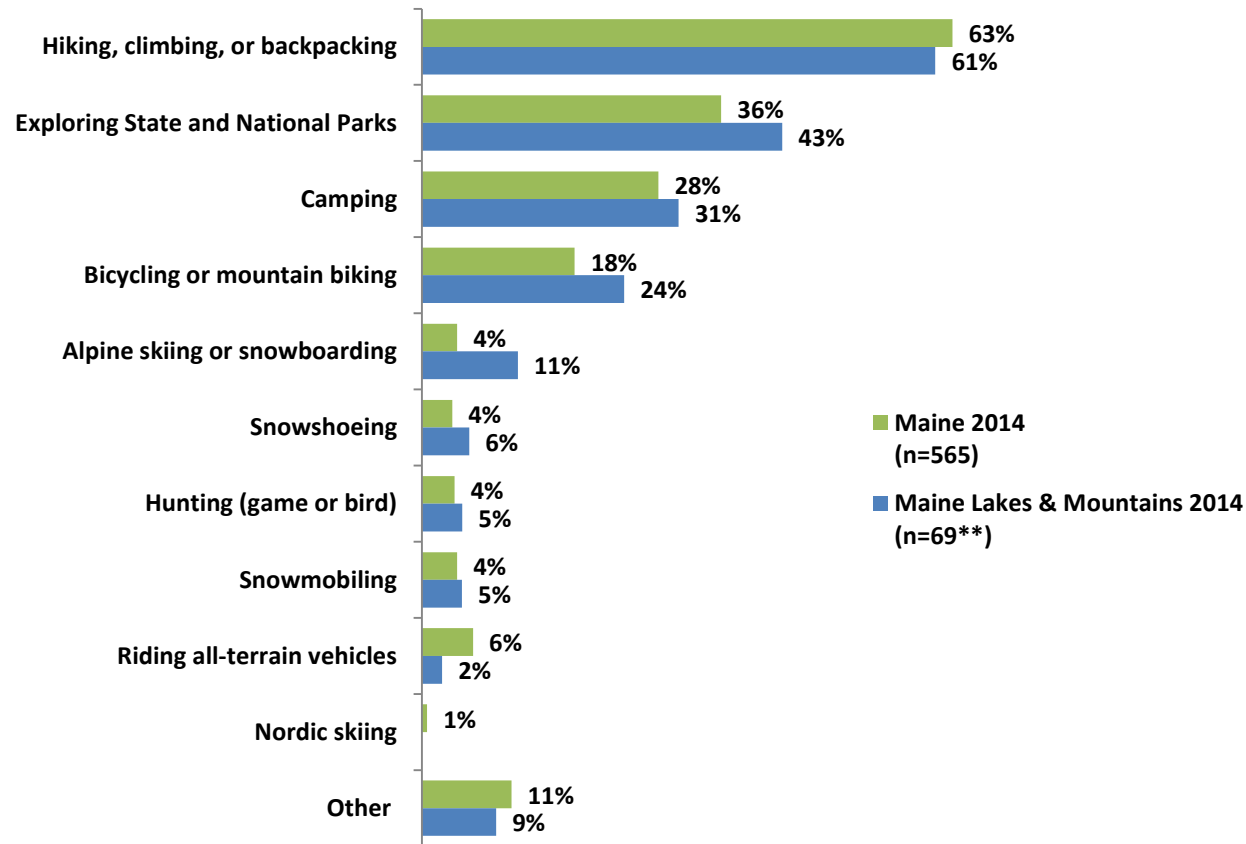
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Hiking/climbing/backpacking is the most common active outdoor activity among day visitors to 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.

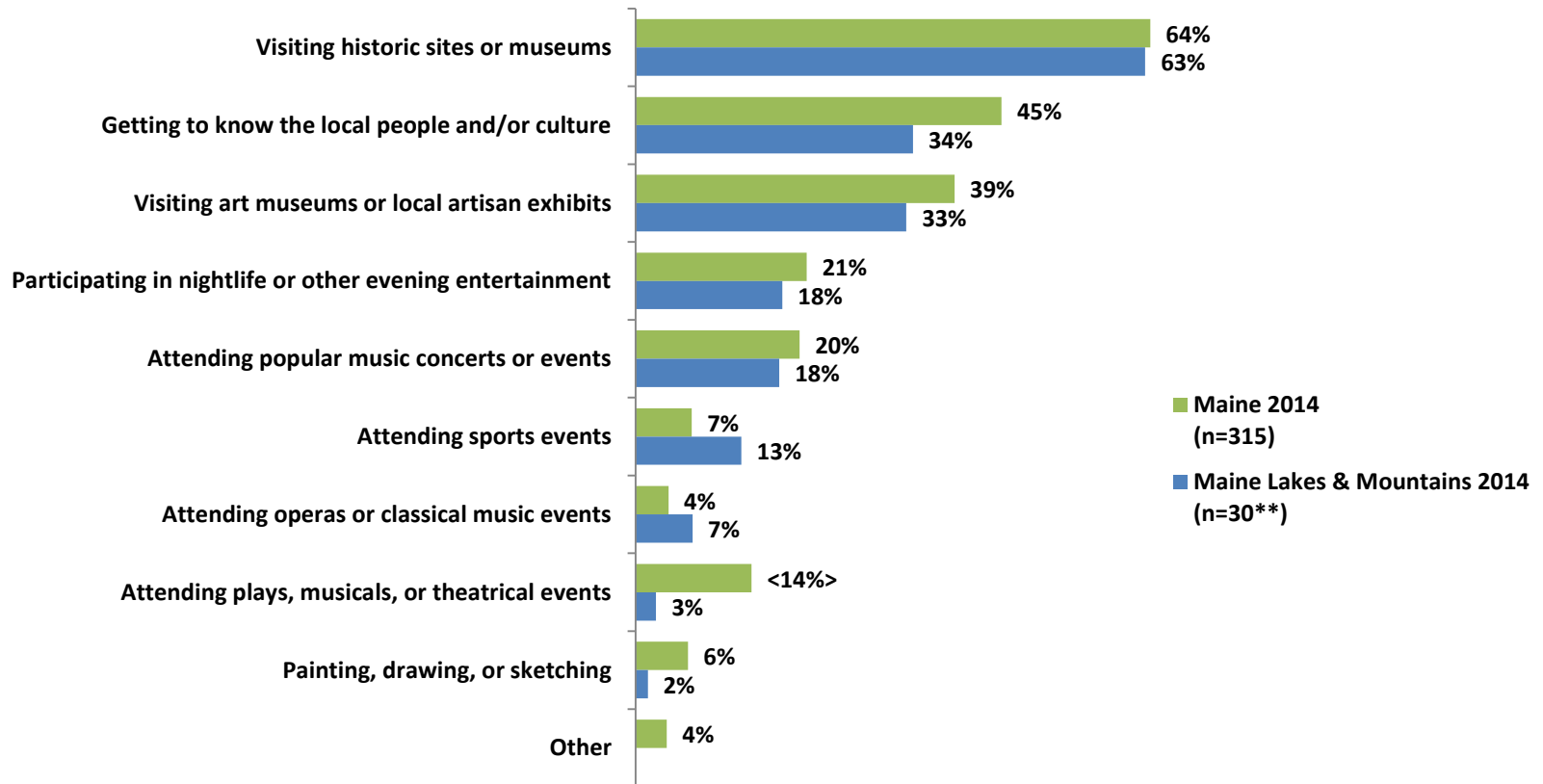
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Two-thirds of day visitors to the region who are interested in history/culture *visited historic sites or museums* during their trip.

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.

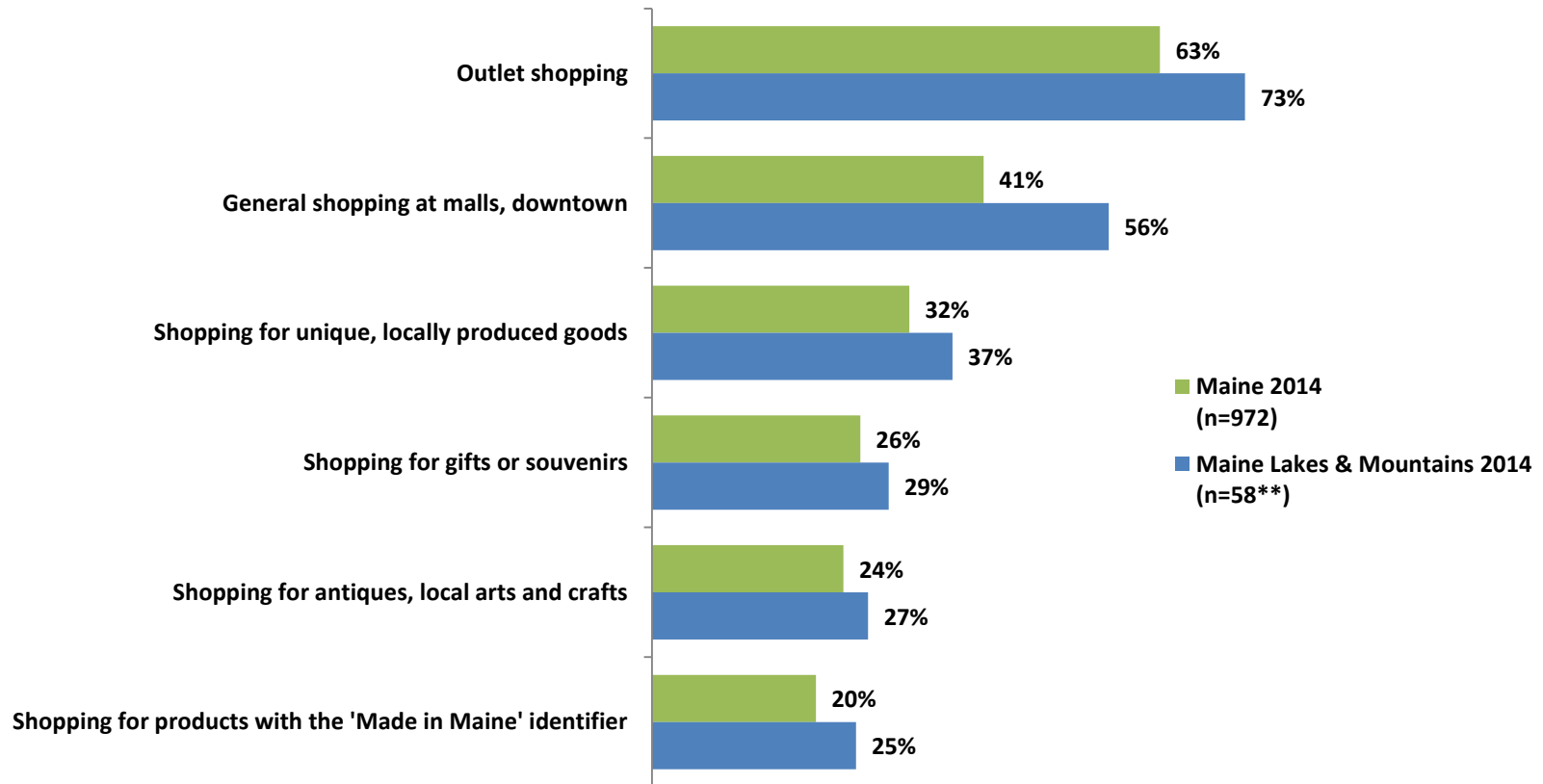
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Three in four day visitors interested in shopping activities go outlet shopping while visiting the Lakes & Mountains 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.

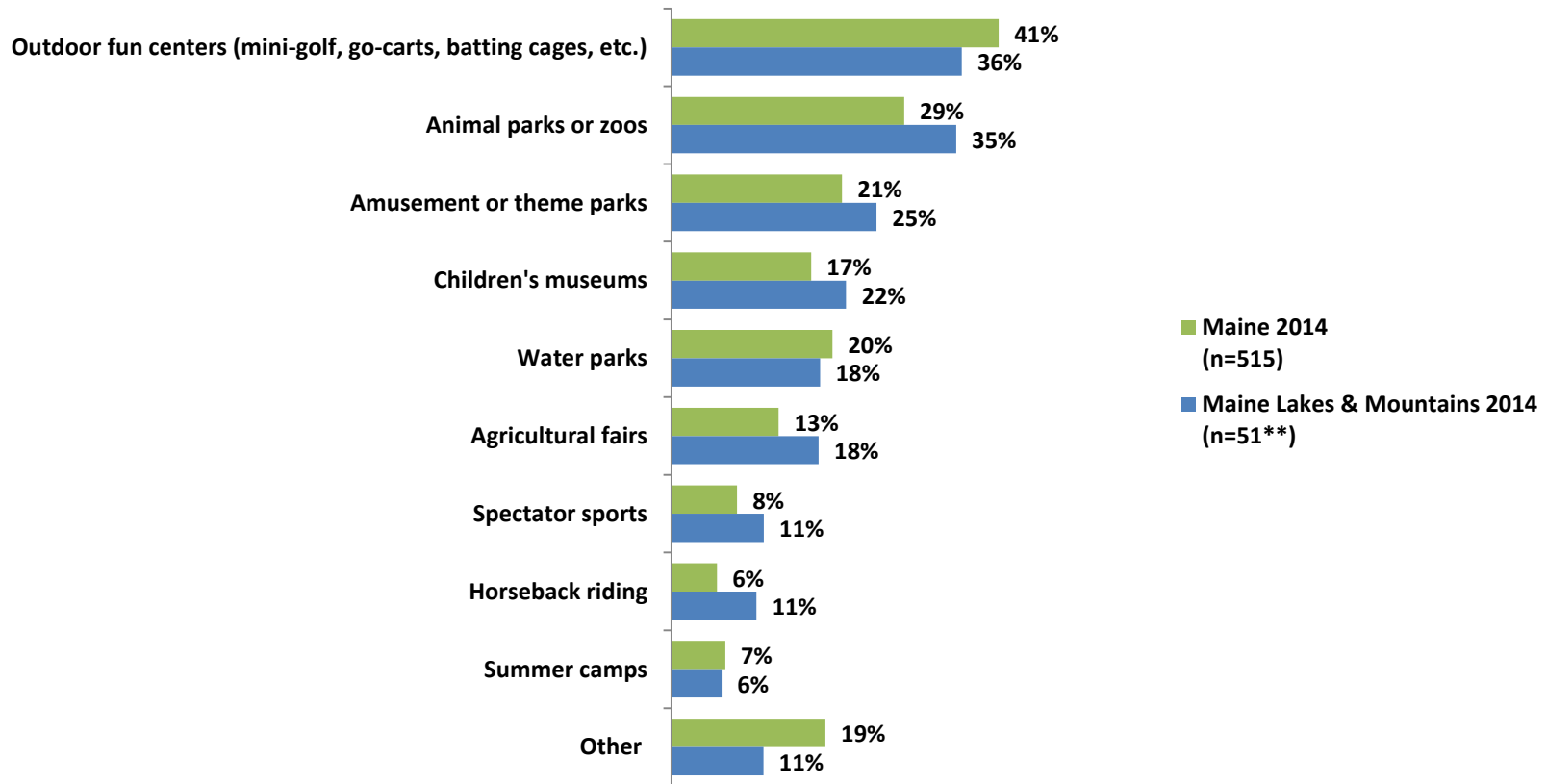
*Questioning regarding interest areas and activities new for 2014; therefore, no comparisons can be made to prior years.

**Please note small sample size.

Outdoor fun centers and animal parks or zoos are each visited by about one in three day visitors to this region who are interested in family fun/children's activities.

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.

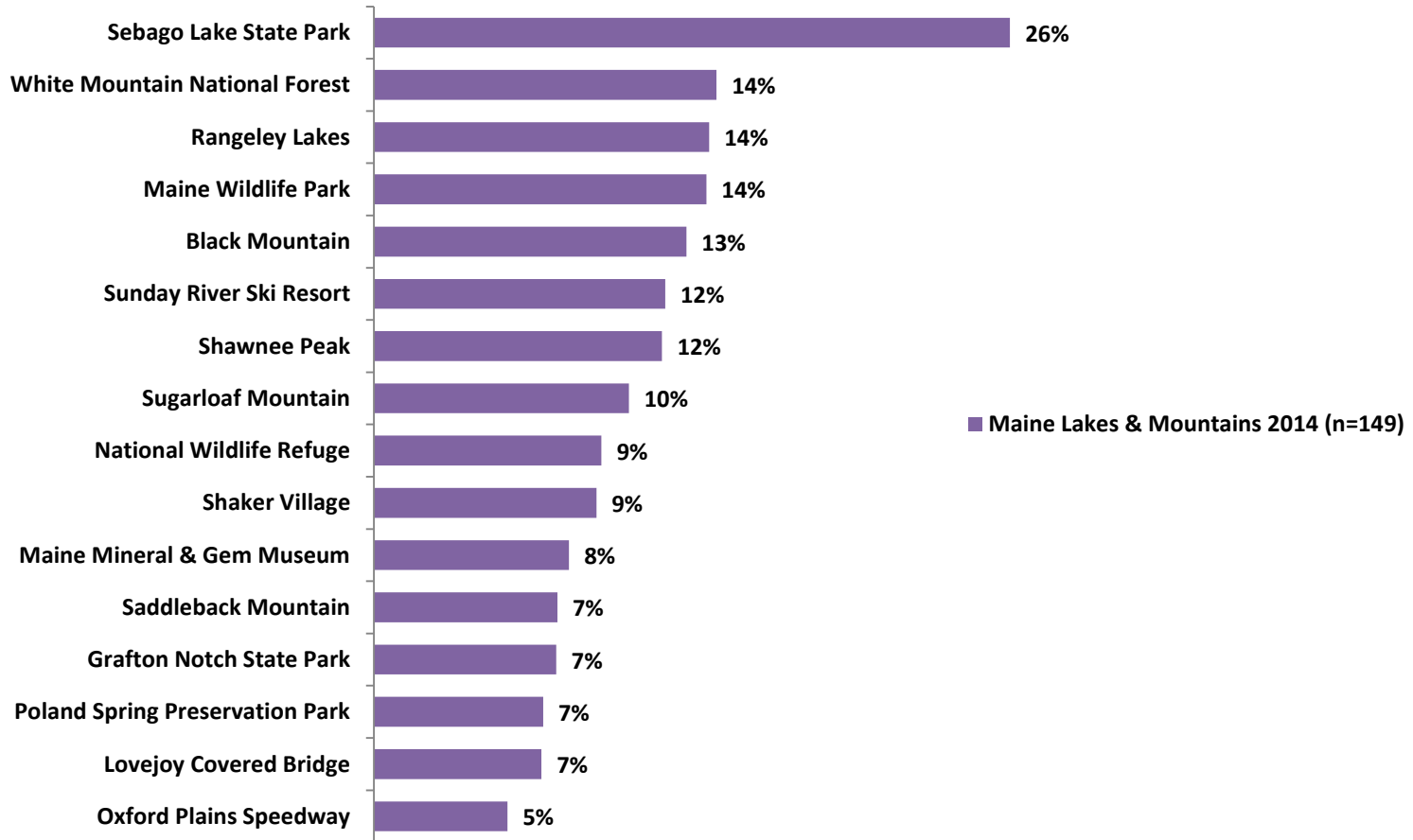
<> indicates a significant difference between subgroups at the 95% confidence level.

*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 Lakes & Mountains region visits Sebago Lake State Park.

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 *Maine Lakes & Mountains* Visitors to Maine



Comparisons: Region vs. State

- Visitors to the Maine Lakes & Mountains 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, travel interest areas, and the activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the outdoor and nature-oriented environment in the Lakes & Mountains region.
- Highlights – Maine Lakes & Mountains region vs. State visitors:

Visitor Origin

- **A greater proportion** of overnight visitors to the region from **Ontario**.
- **A lesser proportion** of overnight visitors to the region from **Quebec** and **New Brunswick**.
- **A greater proportion** of day visitors to the region from **the United States**.
- **A lesser proportion** of day visitors to the region from **Canada**.

Visitor Demographics

- Both overnight and day visitors to the region are **younger**.
- Overnight visitors are **more** likely to be **employed full-time**.

Comparisons: Region vs. State

- Highlights Continued:

First-Time/Repeat Visitation

- Overnight visitors **more** likely to be **first-time visitors** and **less** likely to be **repeat visitors**.

Trip Interest Areas

Overnight and Day Visitors

- **More** likely to want to pursue **active outdoor activities**.
- **Less** likely to want to pursue **shopping**.

Overnight Visitors

- **More** likely to want to pursue **family fun/children's activities**.

Day Visitors

- **More** likely to want to pursue **water activities**.

Comparisons: Region vs. State

- Highlights Continued:

Maine Trip Interests and Importance (Importance Index)

Overnight and Day Visitors

- More likely to place importance on **active outdoor activities**
- Less likely to place importance on **food/beverage/culinary** and **shopping activities**

Overnight Visitors

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

Day Visitors

- More likely to place importance on **history or culture activities**

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More** likely to be:
 - Enjoying the mountain views
 - Viewing fall colors
 - Canoeing/kayaking
 - Motor boating
 - Alpine skiing/snowboarding
 - Shopping for unique, locally produced goods
- **Less** likely to be:
 - Enjoying the ocean views/rocky coast
 - Eating lobster or other local seafood
 - Going to the beach
 - Outlet shopping
 - Visiting amusement or theme parks

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More likely to be:**
 - Enjoying the mountain views
 - Viewing fall colors
 - Wildlife viewing/bird watching
 - Enjoying local food at fairs/festivals
 - Outdoor swimming
 - Canoeing/kayaking
 - Motor boating
- **Less likely to be:**
 - Enjoying the ocean views/rocky coast
 - Eating lobster or other local seafood
 - Attending plays, musicals, or theatrical productions



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