

Maine Office of Tourism Visitor Tracking Research 2015 Calendar Year Annual Report

Regional Insights: Maine Highlands

Prepared by



April 2016

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Research Objectives and Methodology

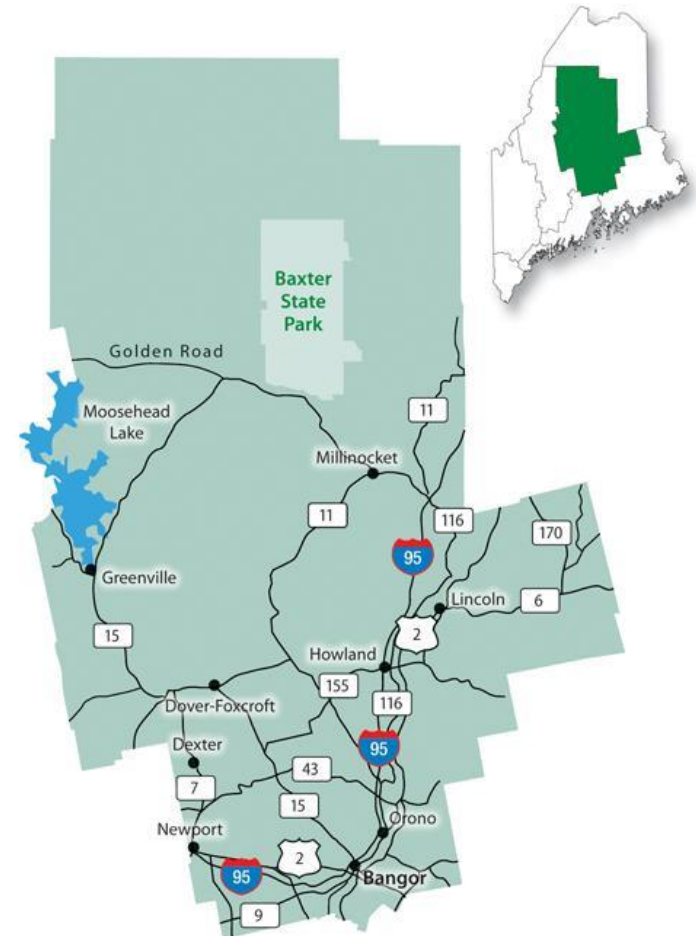


Research Objectives and Methodology

- 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 2015 for travel to Maine occurring from December 2014 through November 2015. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,779
 - Maine Day Visitor – 1,755
 - National Omnibus Survey – 17,812

Research Objectives and Methodology

- The following report summarizes the results among visitors to the Maine Highlands tourism region during 2015, including:
 - 381 overnight visitors, and
 - 144 day visitors.
- Throughout this report, data for the Maine Highlands 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 2014 and 2015 are also highlighted for both the Maine Highlands 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 Highlands region are, on average, 39 years old and have average annual household incomes of \$98,000. Seven in ten have at least a college degree, and 65% are married. Three in four are employed full-time.
- Compared to all overnight visitors to the State of Maine, overnight visitors to the Maine Highlands region are younger, have a lower household income, and are more likely to be employed full-time.

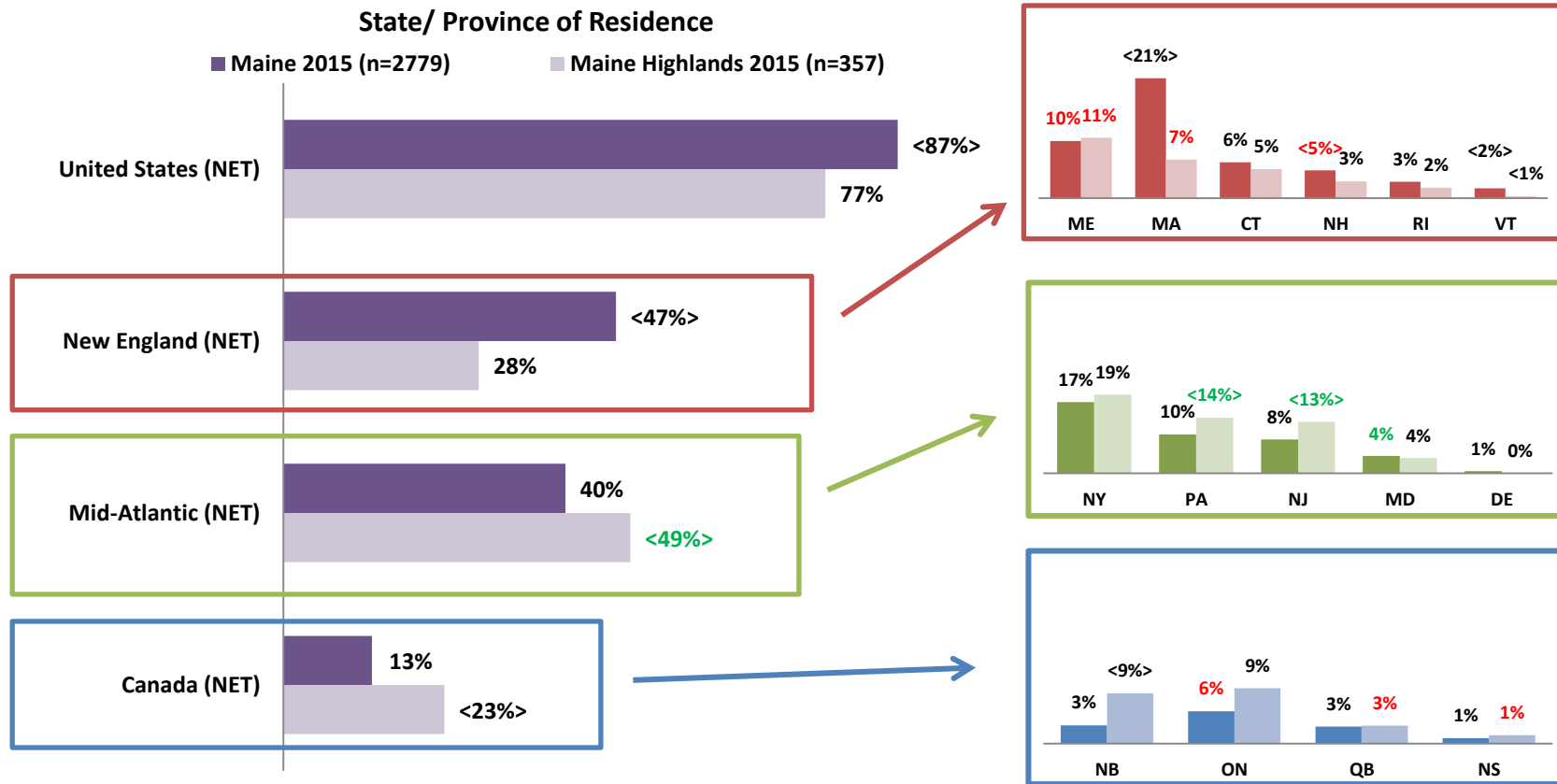
Overnight Visitors	Maine 2015 (n=2779)	Maine Highlands 2015 (n=357)
Age:		
< 35	30%	<43%>
35 - 44	19%	<27%>
45 - 54	19%	14%
55 +	<31%>	16%
Mean Age (Years)	<45.4>	39.3
Income:		
< \$50,000	17%	17%
\$50,000 - \$99,999	41%	<48%>
\$100,000 +	<42%>	35%
Mean Income (Thousands)	<\$103,770>	\$98,130
Female	<58%>	51%
College Degree or Higher	73%	70%
Married	64%	65%
Employed Full Time	63%	<73%>

<> 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.

Three-fourths of overnight visitors to the Maine Highlands region are from the United States.

- Compared to the State of Maine as a whole, the Maine Highlands region attracts a greater proportion of overnight visitors from Canada, and a lesser proportion from the United States (especially New England).
- Overnight visitors to the Maine Highlands are more likely than visitors to Maine overall to come from Pennsylvania, New Jersey, and New Brunswick and less likely to come from Massachusetts and New Hampshire.



State/ Province of Residence

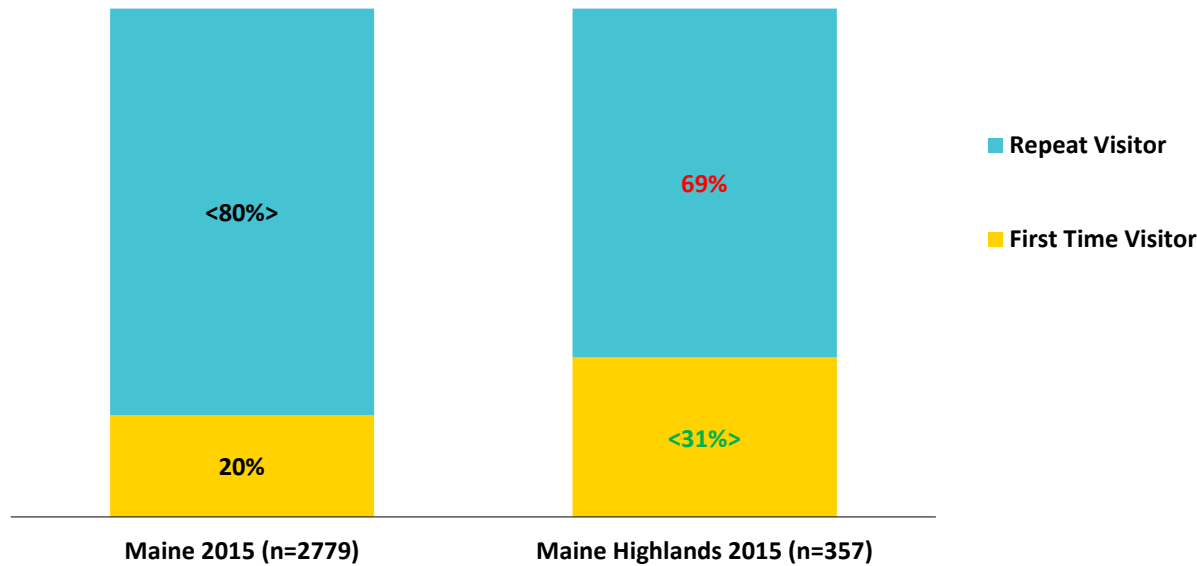
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Seven in ten overnight visitors to the Maine Highlands region are repeat Maine visitors.

- Overnight visitors to the Maine Highlands region are more likely to be visiting Maine for the first time than are visitors to the State as a whole.

Repeat vs. First Time Visitors



Q11. Was this your first visit in Maine?

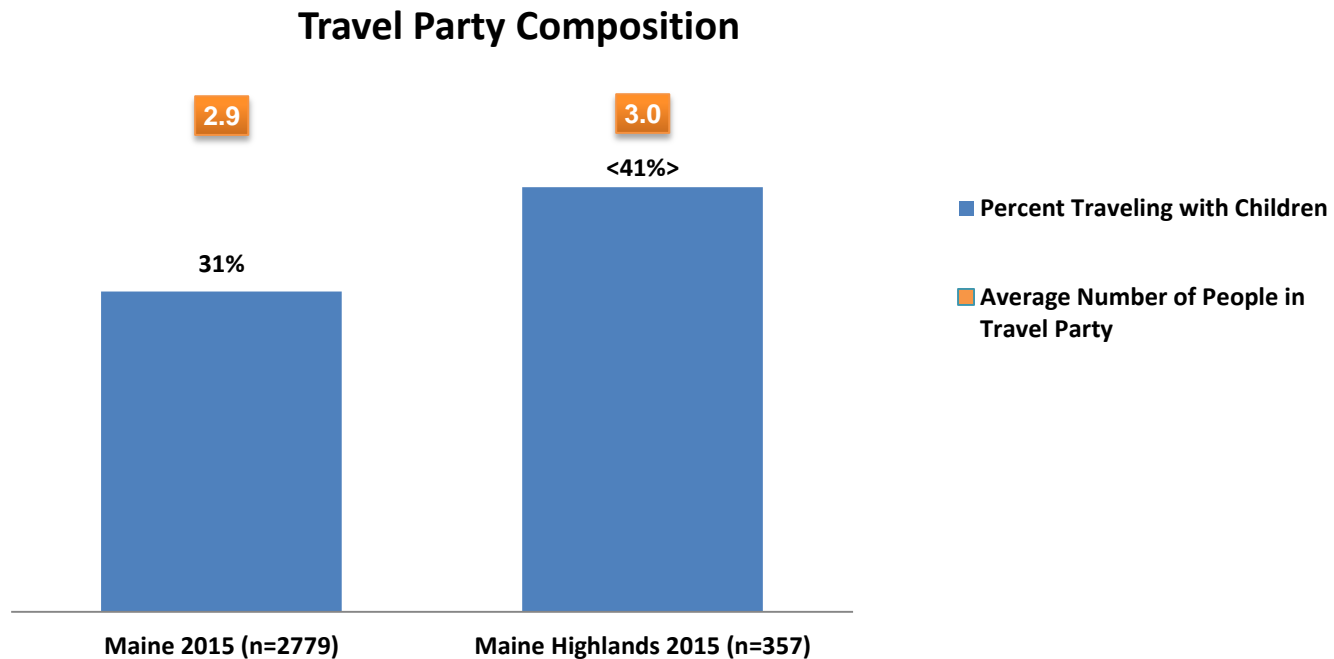
Q12. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

<> 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.

The average overnight visitor to the Maine Highlands region is traveling in a party of three, and 41% are traveling with children.

- Maine Highlands visitors are more likely to be traveling with children compared to visitors to the State overall.



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?

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

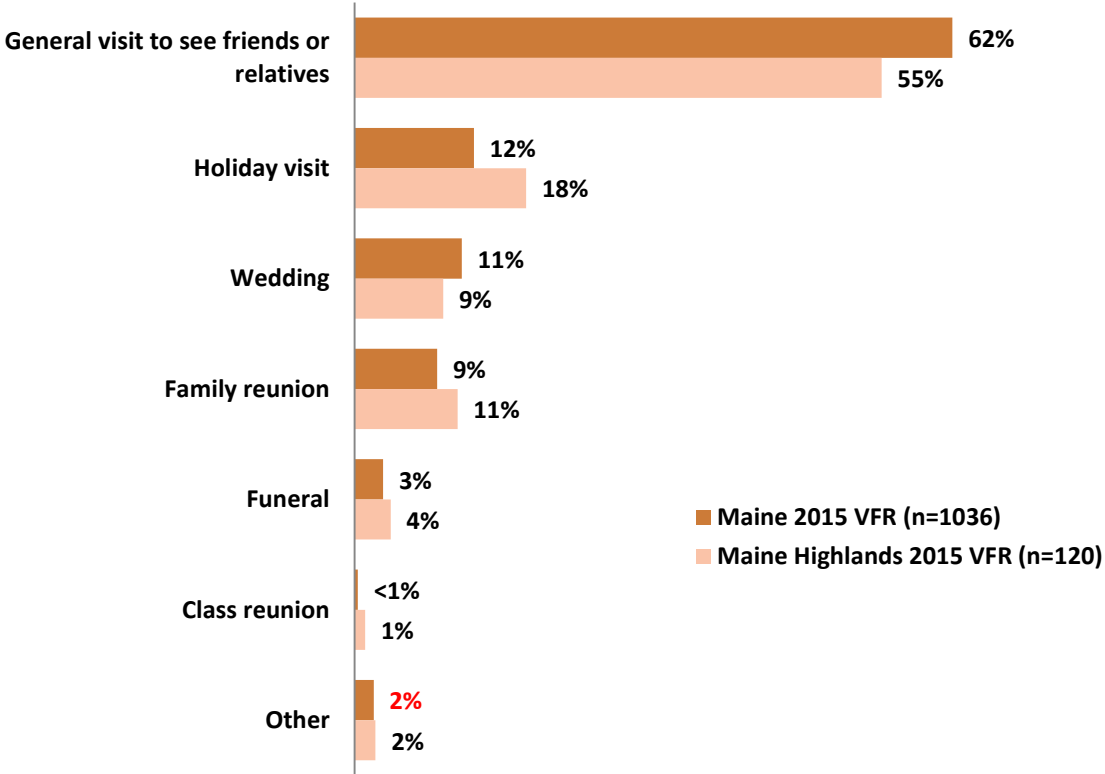
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



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

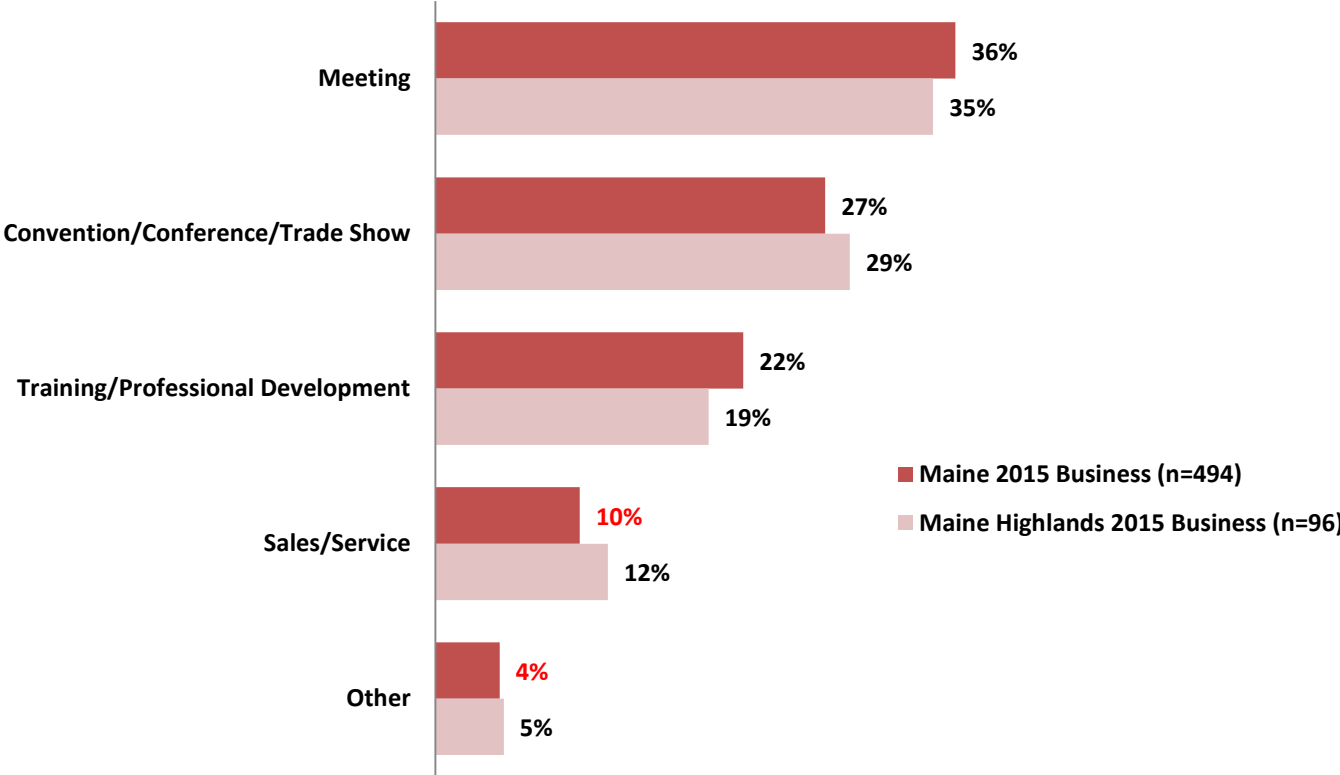
Primary Purpose of Overnight VFR Trips



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.

Meetings and conventions/conferences/trade shows are the top reasons for an overnight business trip to the Maine Highlands region.

Primary Purpose of Overnight Business Trips



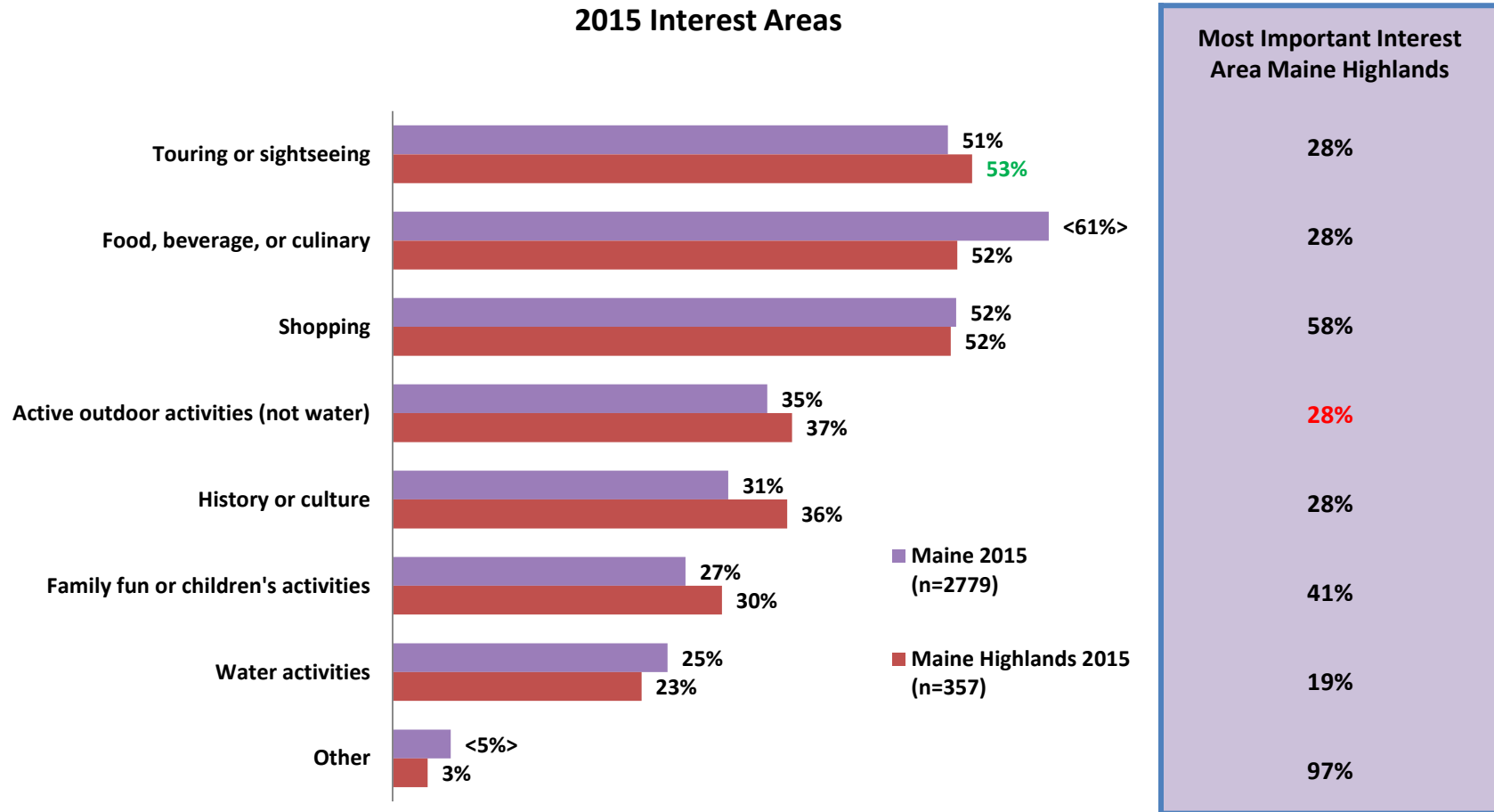
Q8. What was the primary purpose of your most recent business trip in Maine?

<> 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.

Half of overnight travelers to the Maine Highlands region are interested in pursuing *touring/sightseeing activities, food/beverage/culinary activities, and shopping* while in the area.

- Overnight visitors to the Maine Highlands region are less likely to be interested in pursuing *food/beverage/culinary activities* while visiting than are overnight visitors to the State as a whole.



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

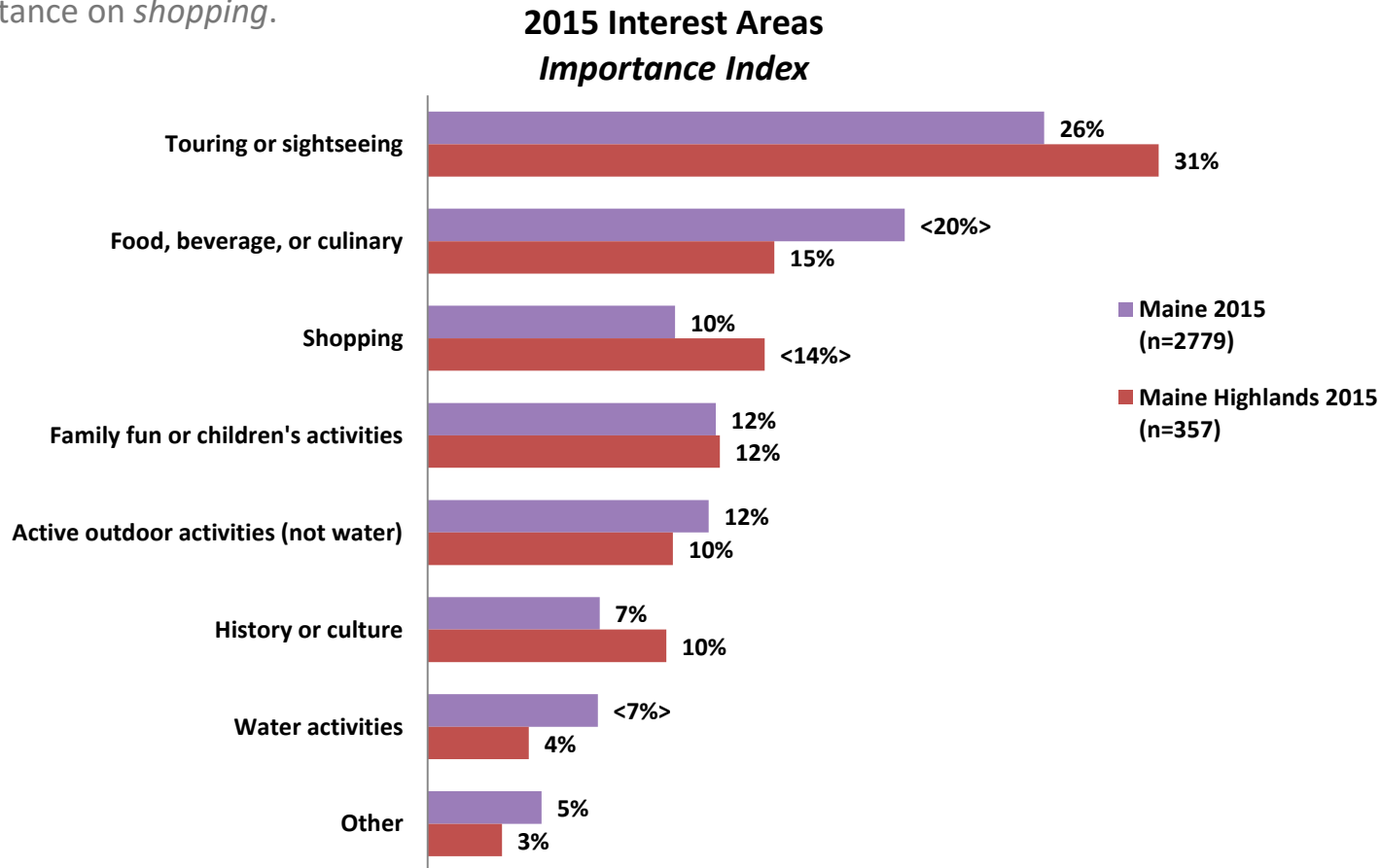
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

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

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

When analyzing both interest and importance in deciding to visit, touring or sightseeing ranks the highest among overnight visitors to the Maine Highlands region.

- When looking at both their interest in these activities and the importance they place on them, visitors to the Maine Highlands region place less importance on *food/beverage/culinary activities* and *water activities* than do visitors to the State as a whole. Conversely, this region's overnight visitors place more importance on *shopping*.



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.

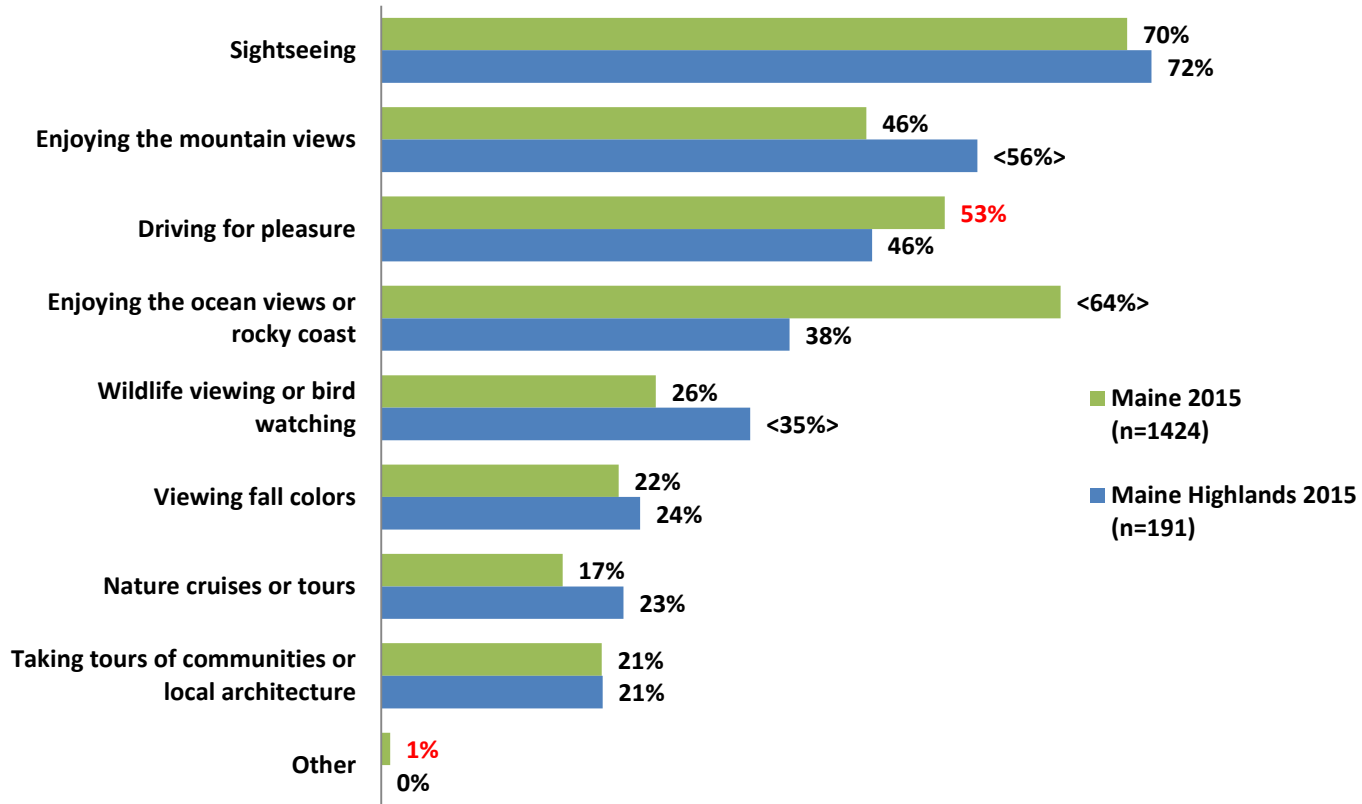
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General sightseeing is the most common touring/sightseeing activity of overnight visitors to the Maine Highlands region.

- Maine Highlands visitors are more likely to *enjoy mountain views* and participate in *wildlife viewing or bird watching* compared to visitors to Maine overall, but less likely to be *enjoying ocean views*.

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.

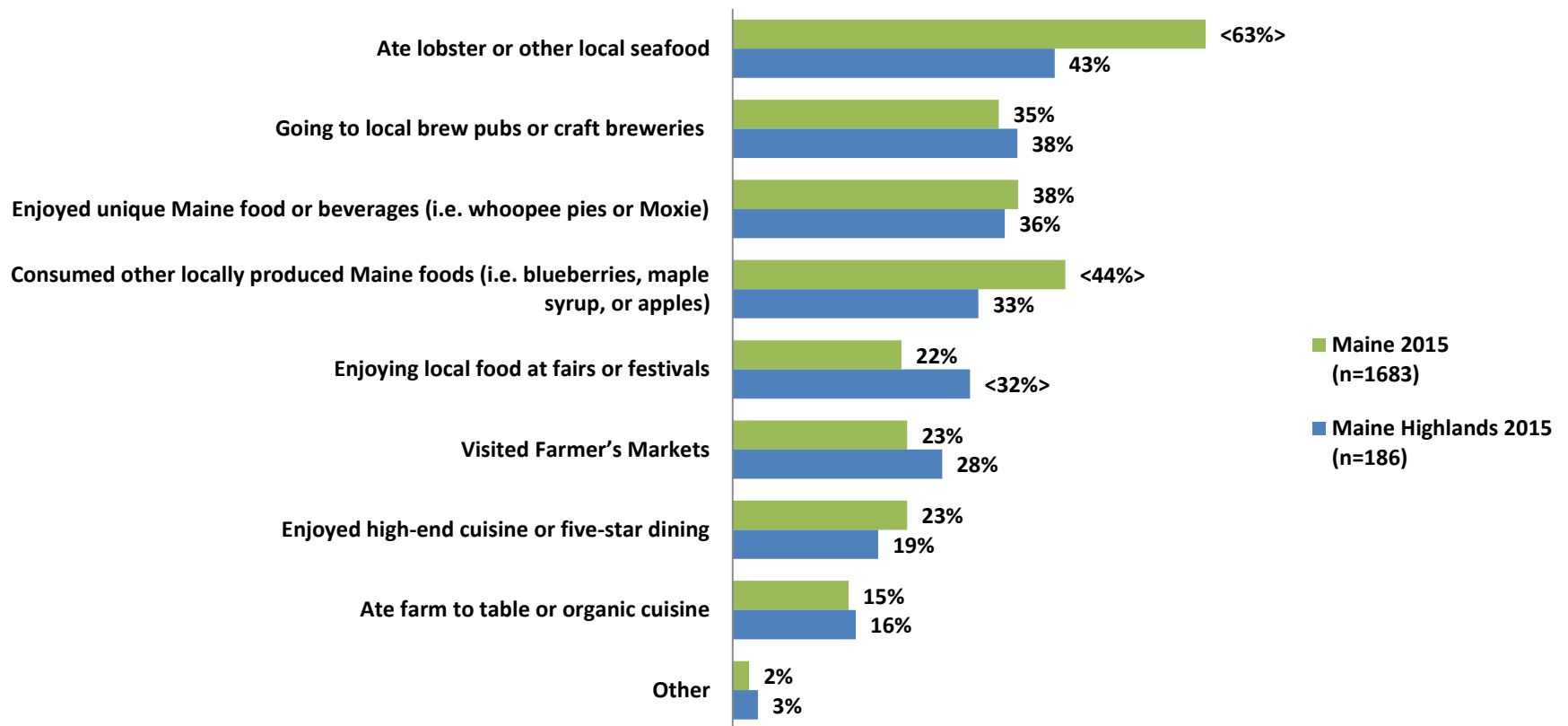
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common food/beverage/culinary activity among Maine Highlands overnight visitors is *eating lobster or other local seafood*.

- *Eating lobster or other local seafood and consuming locally produced Maine foods are both less popular among Maine Highlands visitors than among visitors to Maine as a whole. Enjoying local food at fairs and festivals, however, is more popular among this region’s overnight visitors.*

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.

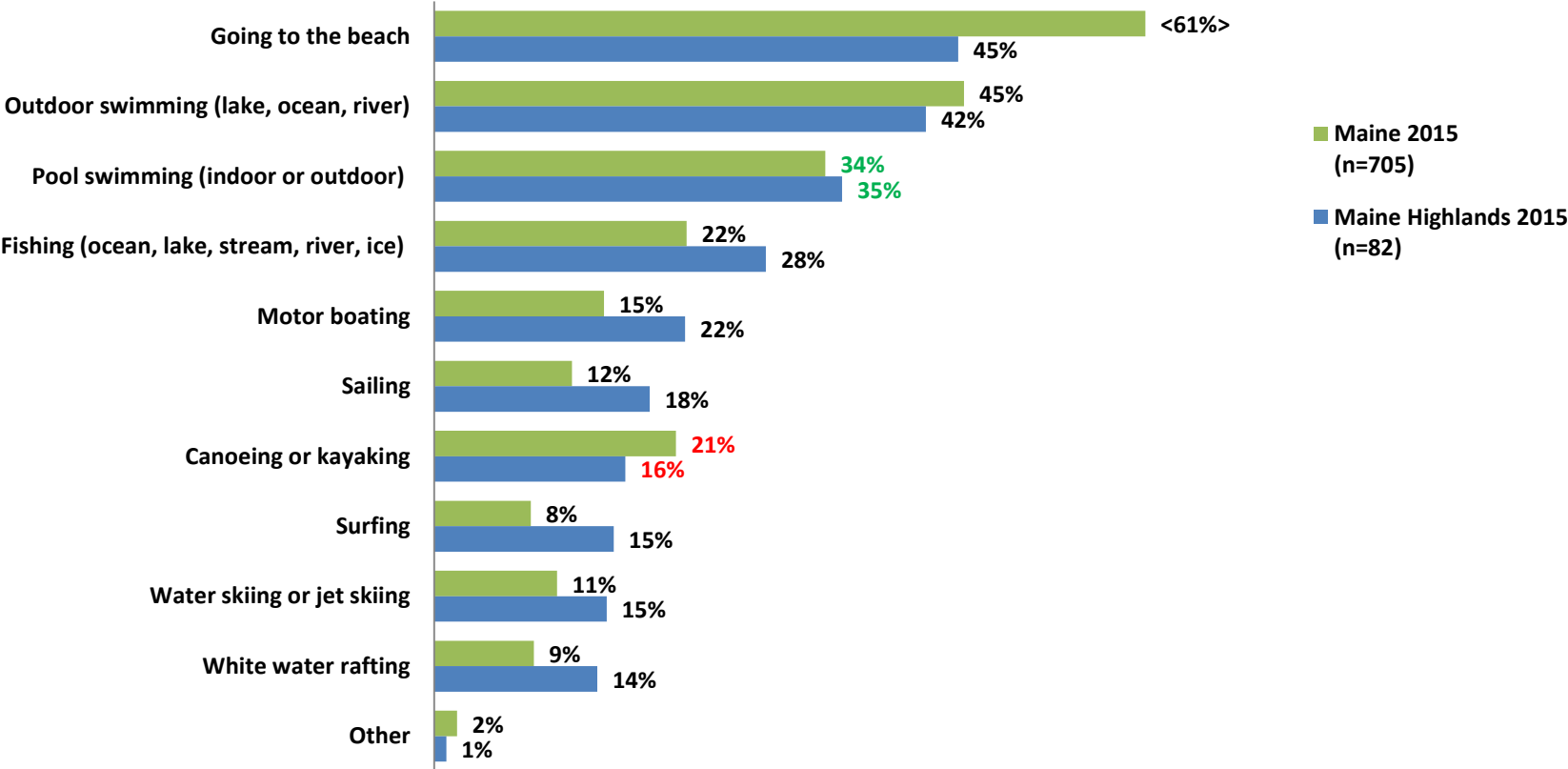
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The most common water activities among overnight visitors to this region are *going to the beach* and *outdoor swimming*.

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.

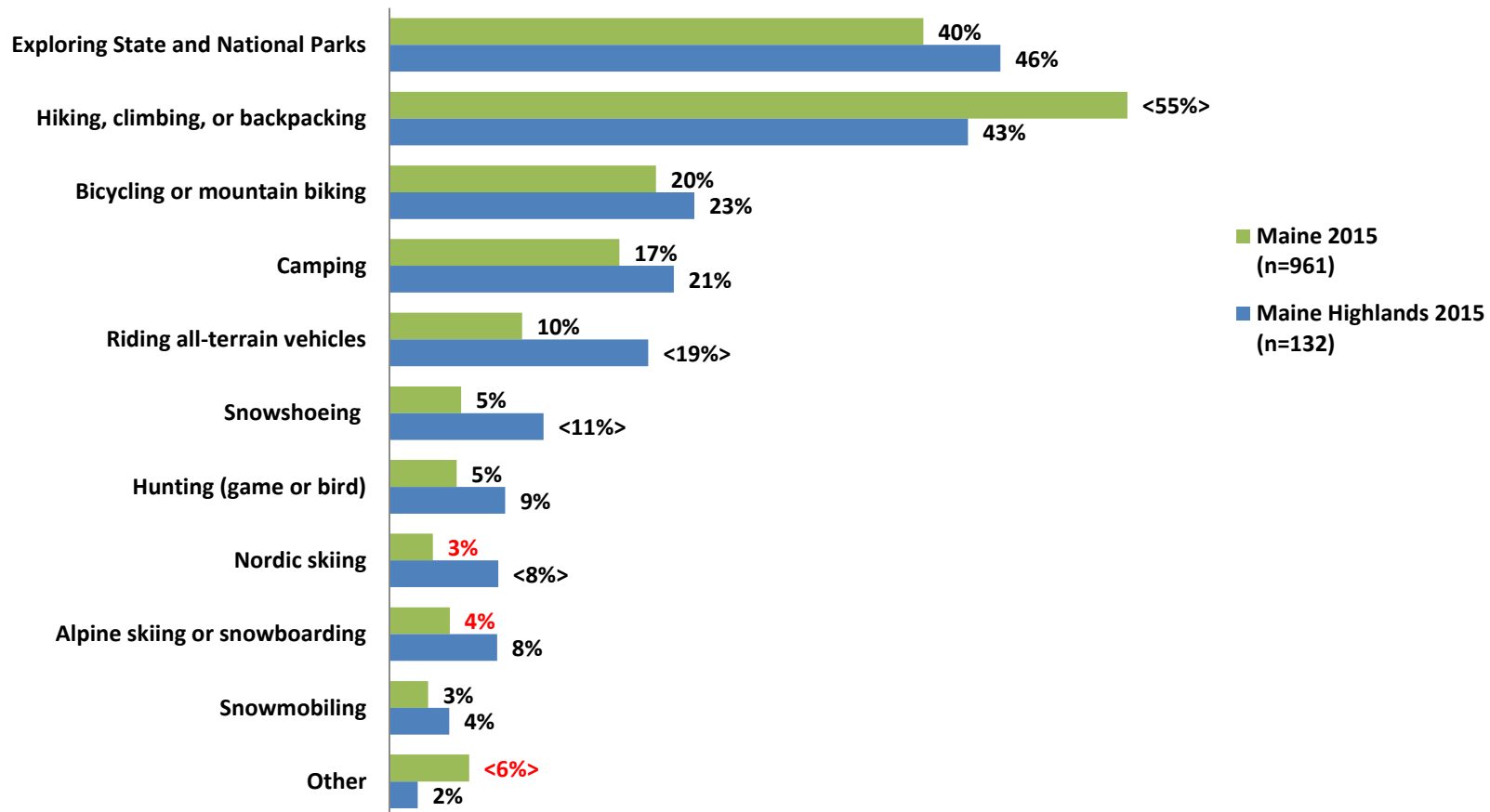
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of those interested in active outdoor activities *explore State and National parks* during their overnight visit to the Maine Highlands region.

- *Riding ATVs, snowshoeing, and Nordic skiing* are all more popular outdoor activities in the Maine Highlands region than they are in 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.*

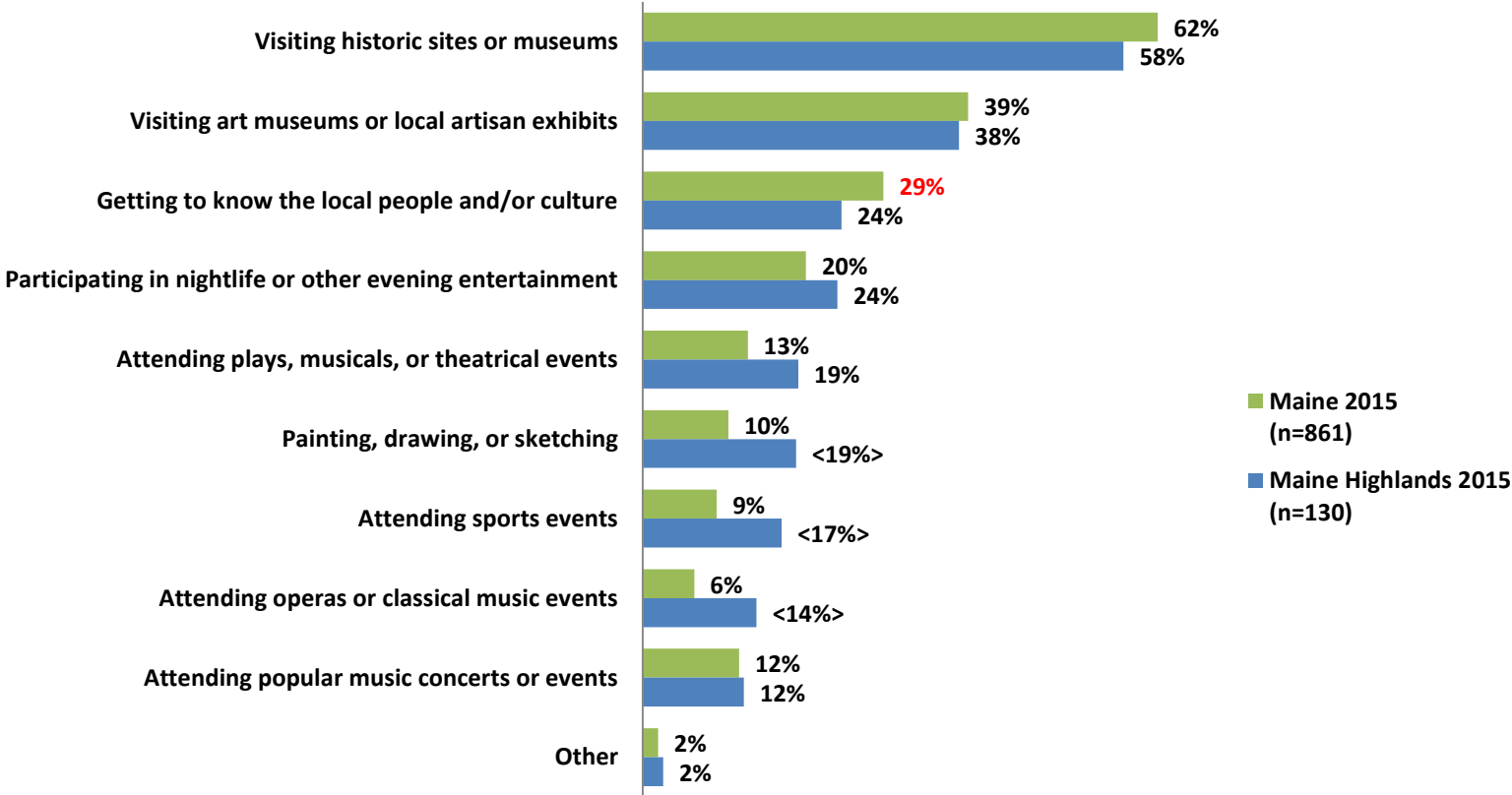
<> indicates a significant difference between subgroups at the 95% confidence level.

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Maine Highlands visitors interested in history or culture activities are most likely to *visit 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.

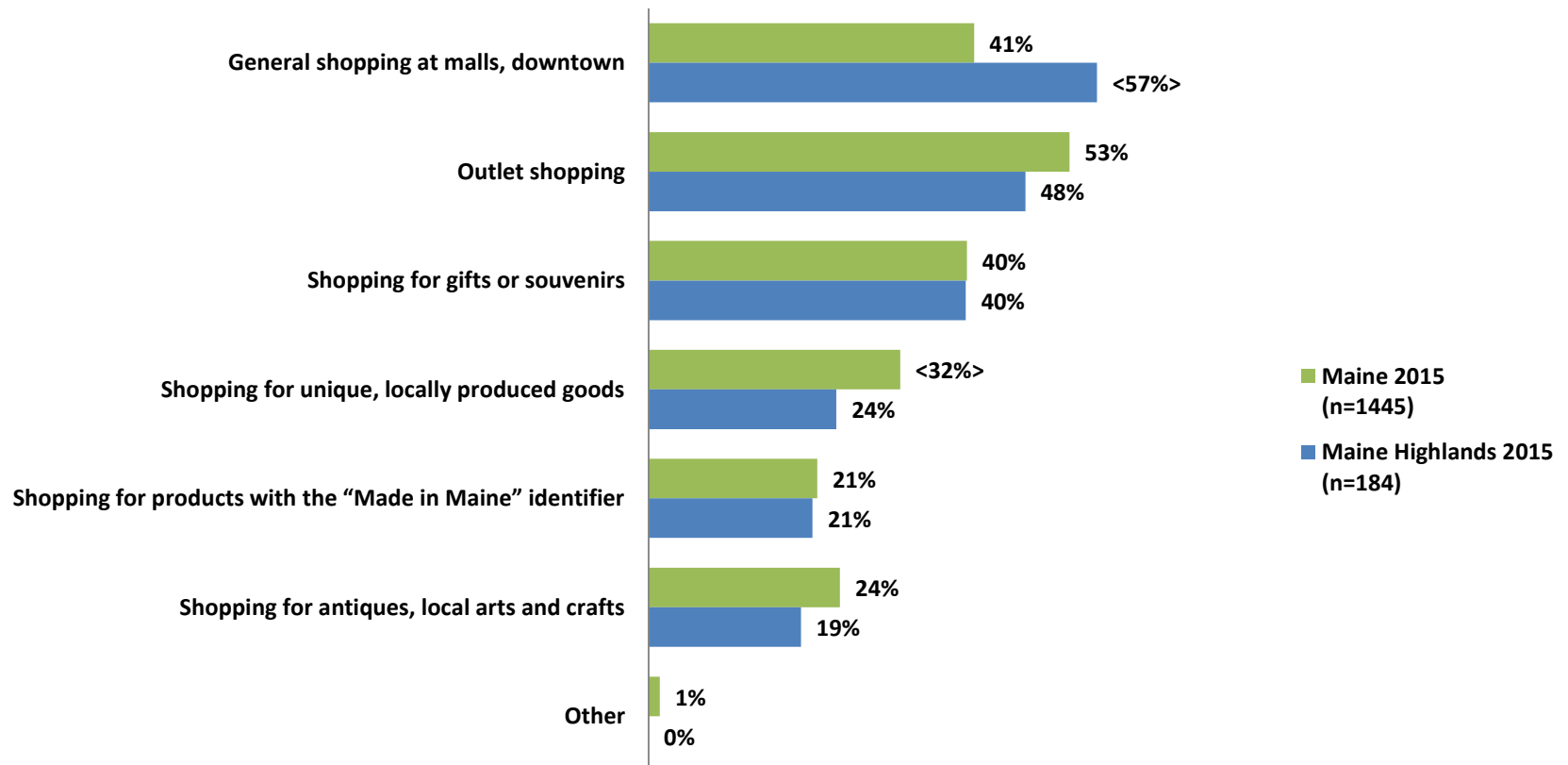
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General shopping at malls or downtown is the most common shopping activity participated in by overnight visitors to the region who are interesting in shopping.

- Maine Highlands visitors are more likely to do *general mall/downtown shopping* compared to all Maine visitors, and less likely to *shop for unique, locally produced goods*.

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.

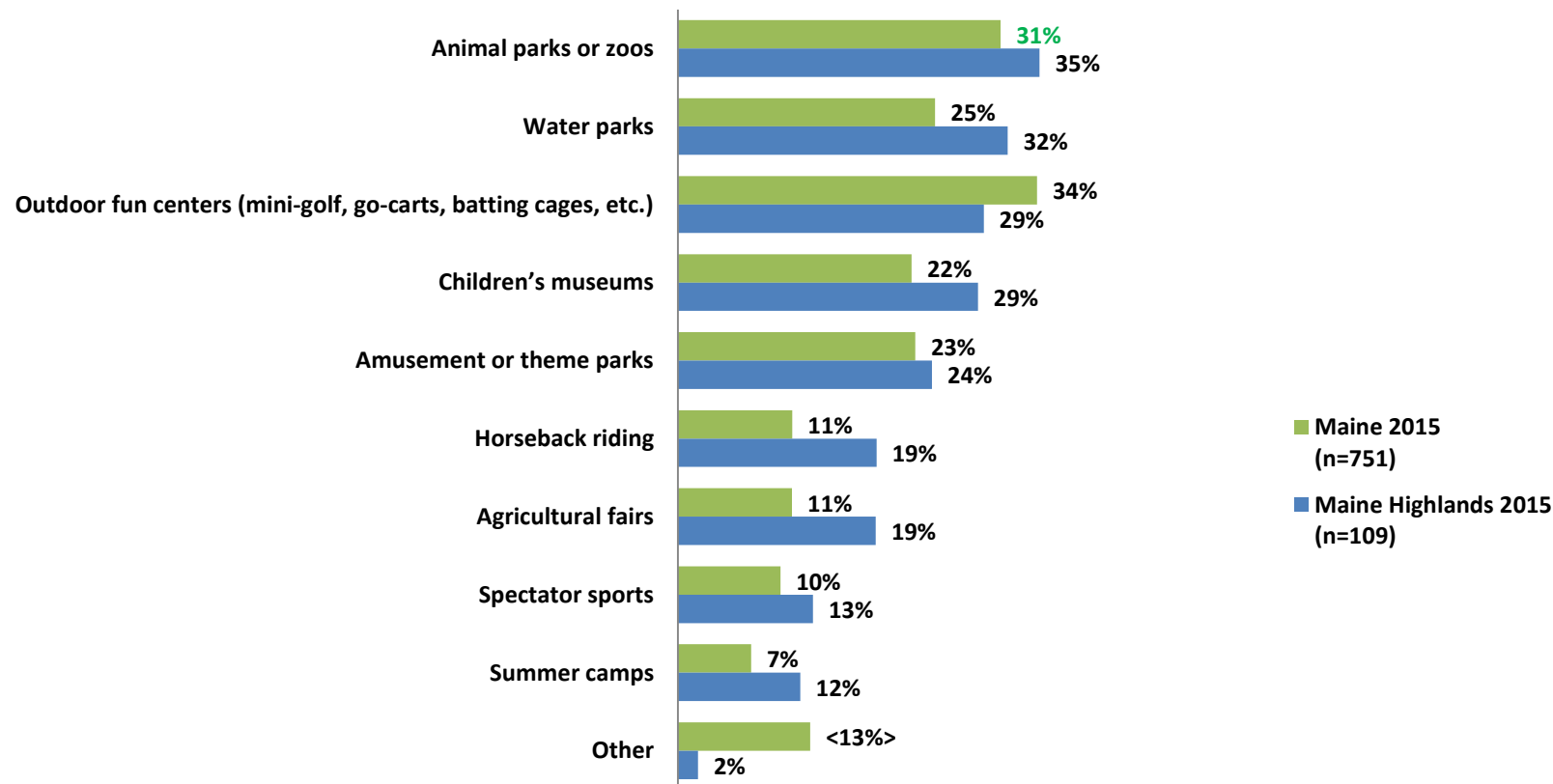
<> indicates a significant difference between subgroups at the 95% confidence level.

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Overnight visitors to the Maine Highlands region who are interested in family fun/children's activities participate in a wide variety of these types of activities.

Family Fun/Children's Activities

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



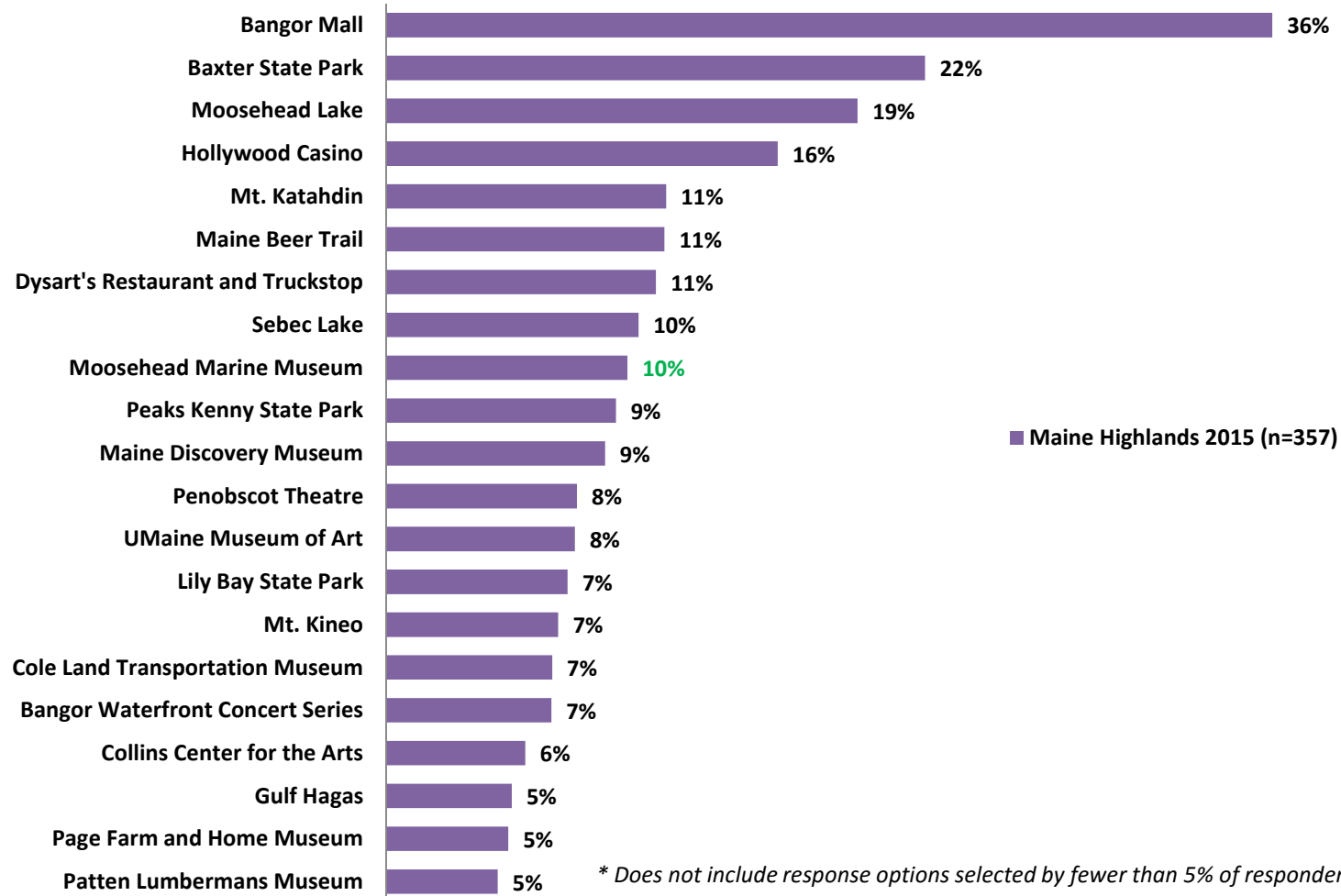
Q31. In which of the following activities did you participate during this trip? Please check all that apply.

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

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One in three overnight visitors to the Maine Highlands visited the Bangor Mall while in the region.

Top Attractions/Locations Visited*



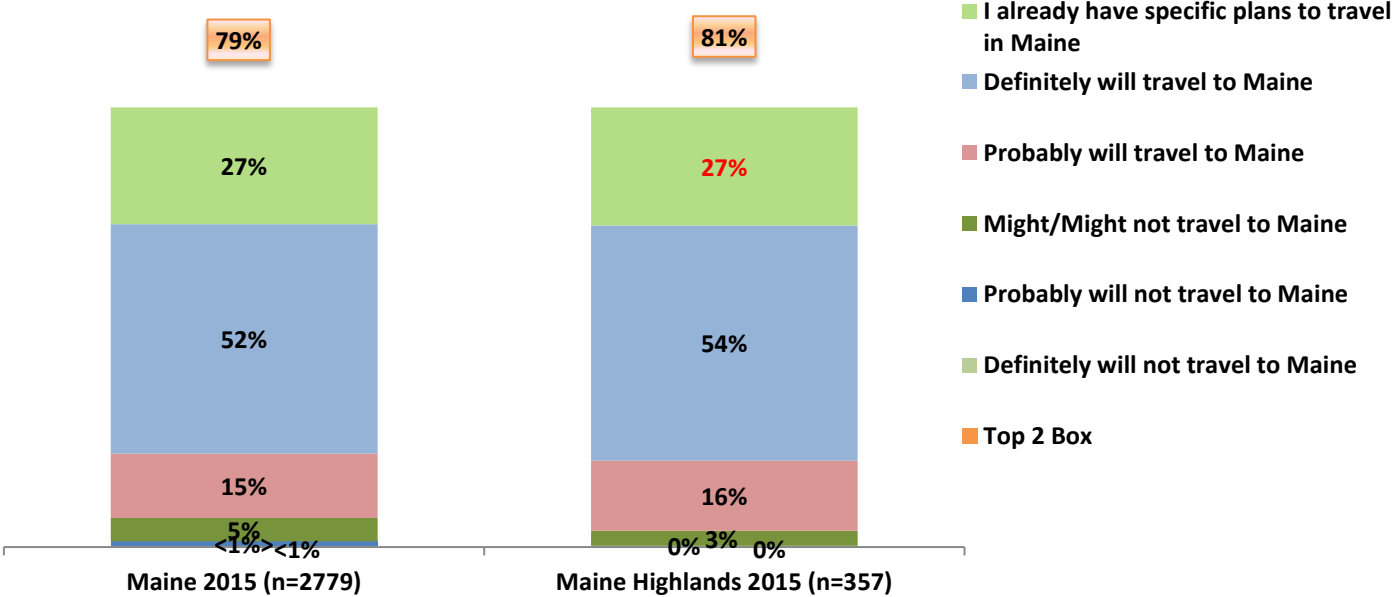
Q26: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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A strong majority of overnight visitors to the Maine Highlands plan to return to Maine in the next two years (81%).

Future Travel Likelihood



Q38. How likely will you be to travel in Maine in the next two years?
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Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Maine Highlands region average 42 years of age, earning just under \$79,000 annually. Three in five have a college degree, and 65% are employed full-time.
- Similar to overnight visitors, day visitors to the Maine Highlands tourism region have lower average annual household incomes and are younger than Maine visitors overall. They are also less likely to have a college degree than day visitors to the State overall, and more likely to be employed full-time.

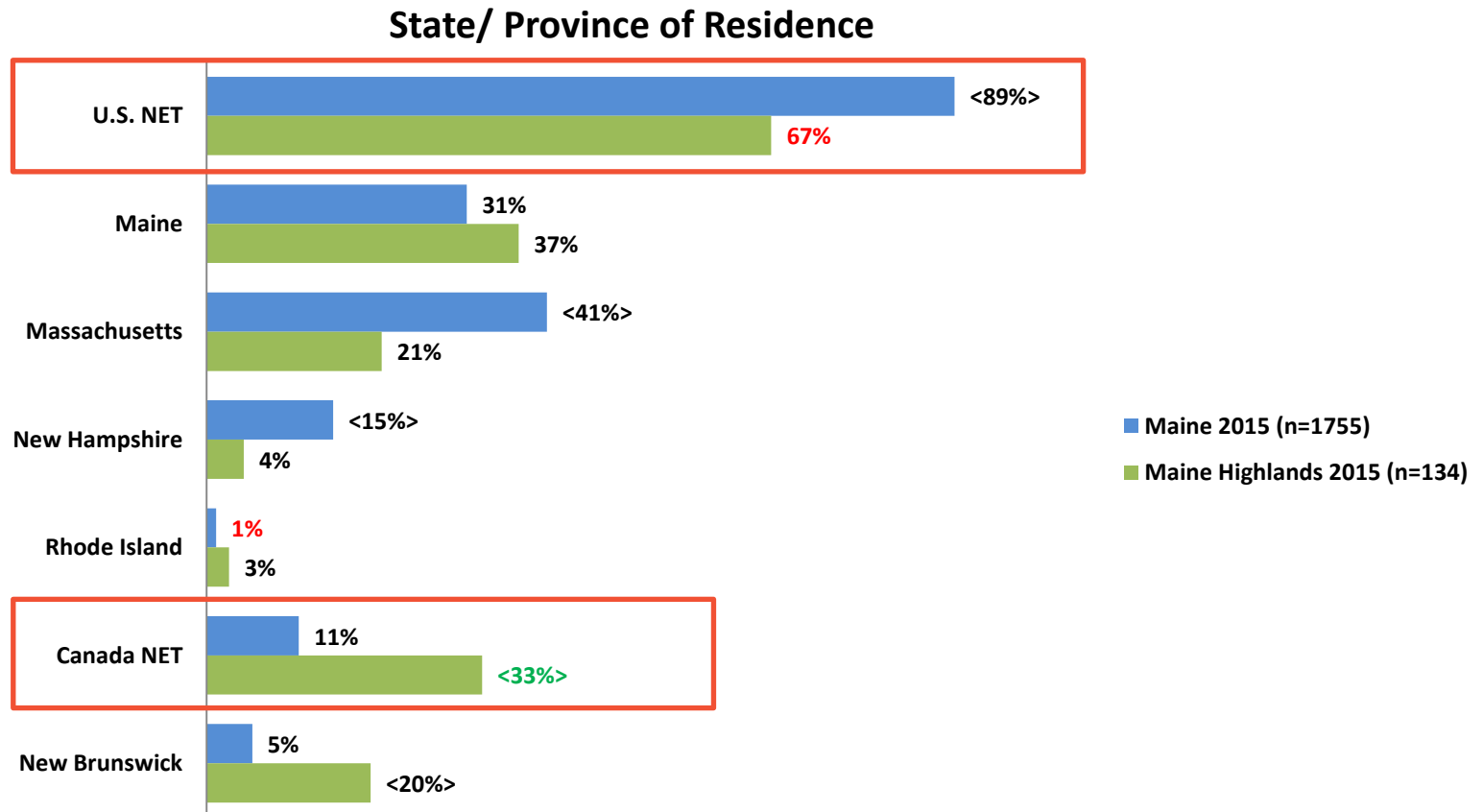
Day Visitors	Maine 2015 (n=1755)	Maine Highlands 2015 (n=134)
Age:		
< 35	25%	33%
35 - 44	16%	23%
45 - 54	21%	23%
55 +	38%	21%
Mean Age (Years)	<48.0>	42.0
Income:		
< \$50,000	22%	<35%>
\$50,000 - \$99,999	43%	40%
\$100,000 +	<35%>	25%
Mean Income (Thousands)	<\$93,020>	\$78,830
Female	62%	60%
College Degree or Higher	<68%>	58%
Married	60%	52%
Employed Full Time	55%	<65%>

<> 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.

Two-thirds of day visitors to the Maine Highlands arrive from the United States, while one-third come from Canada.

- When compared with the State of Maine as a whole, day visitors to the Maine Highlands are more likely to be from Canada. In addition, this proportion of Canadian visitors increased from 2014 (20%) to 2015 (33%).



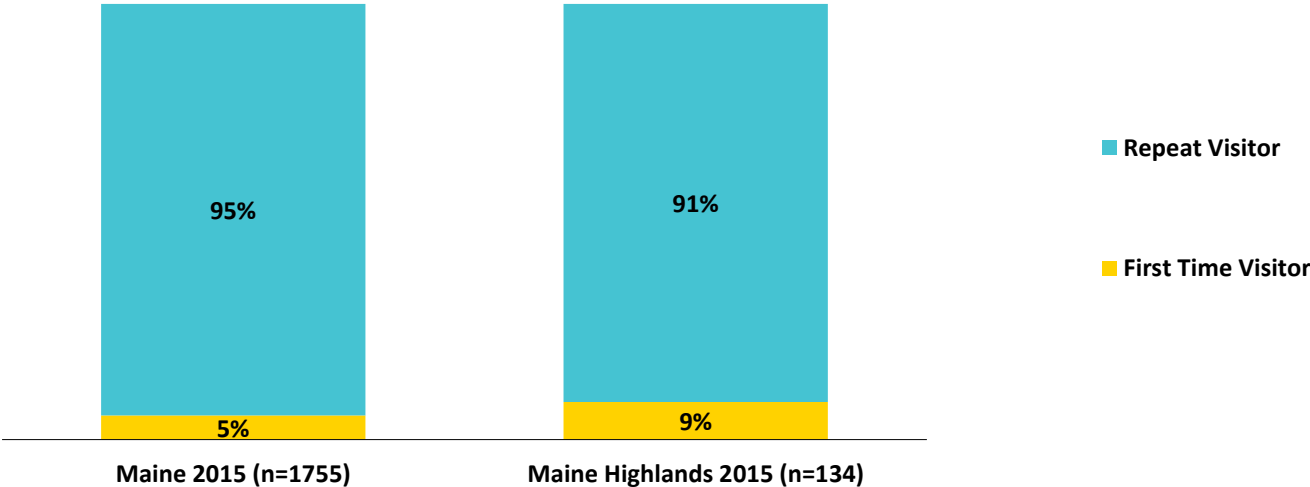
Q2. In what State or Province do you reside?

<> 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 day visitors to the Maine Highlands have previously visited Maine.

Repeat vs. First Time Visitors



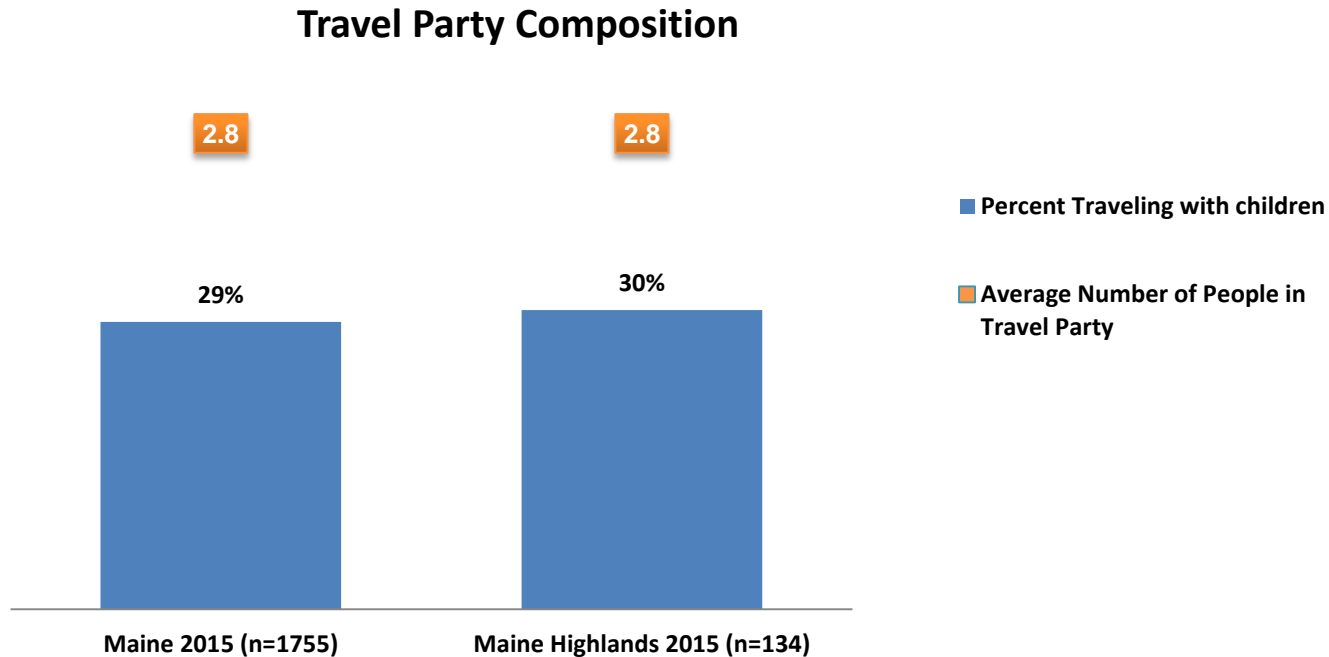
Q10. Was this your first trip to Maine?

Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

<> 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.

On average, day visitors to the Maine Highlands region travel in parties of three people, and nearly one-third are traveling with children.



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

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

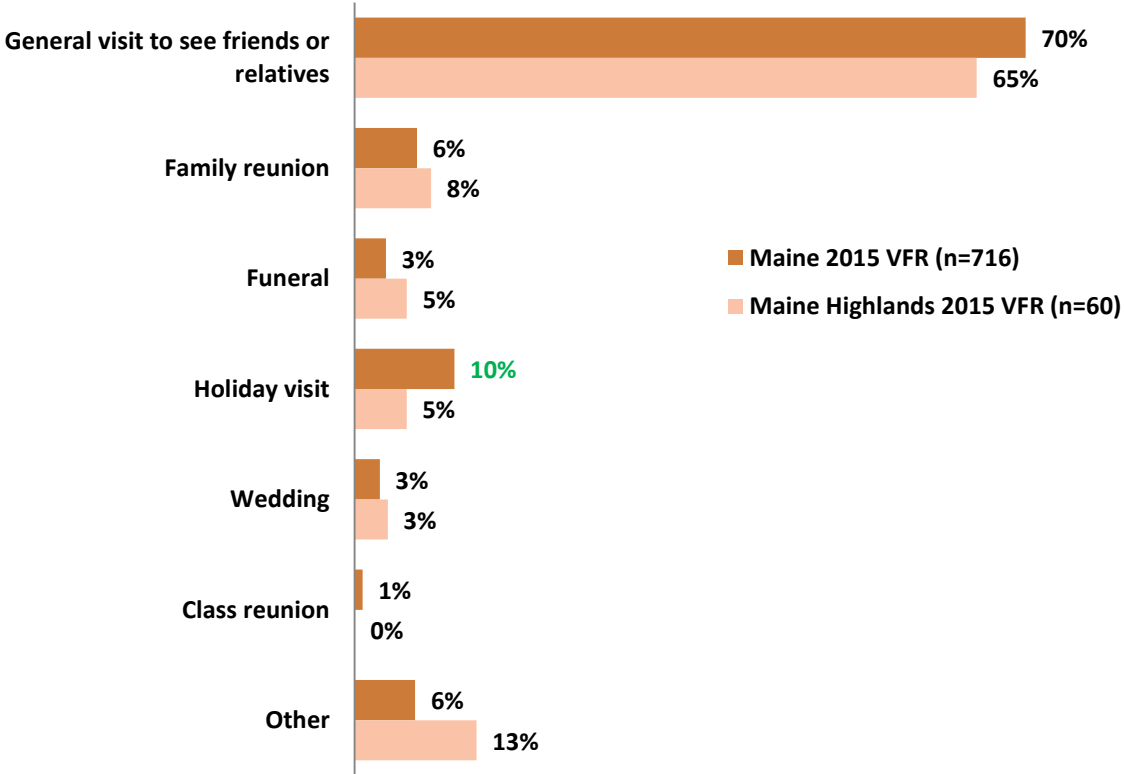
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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.

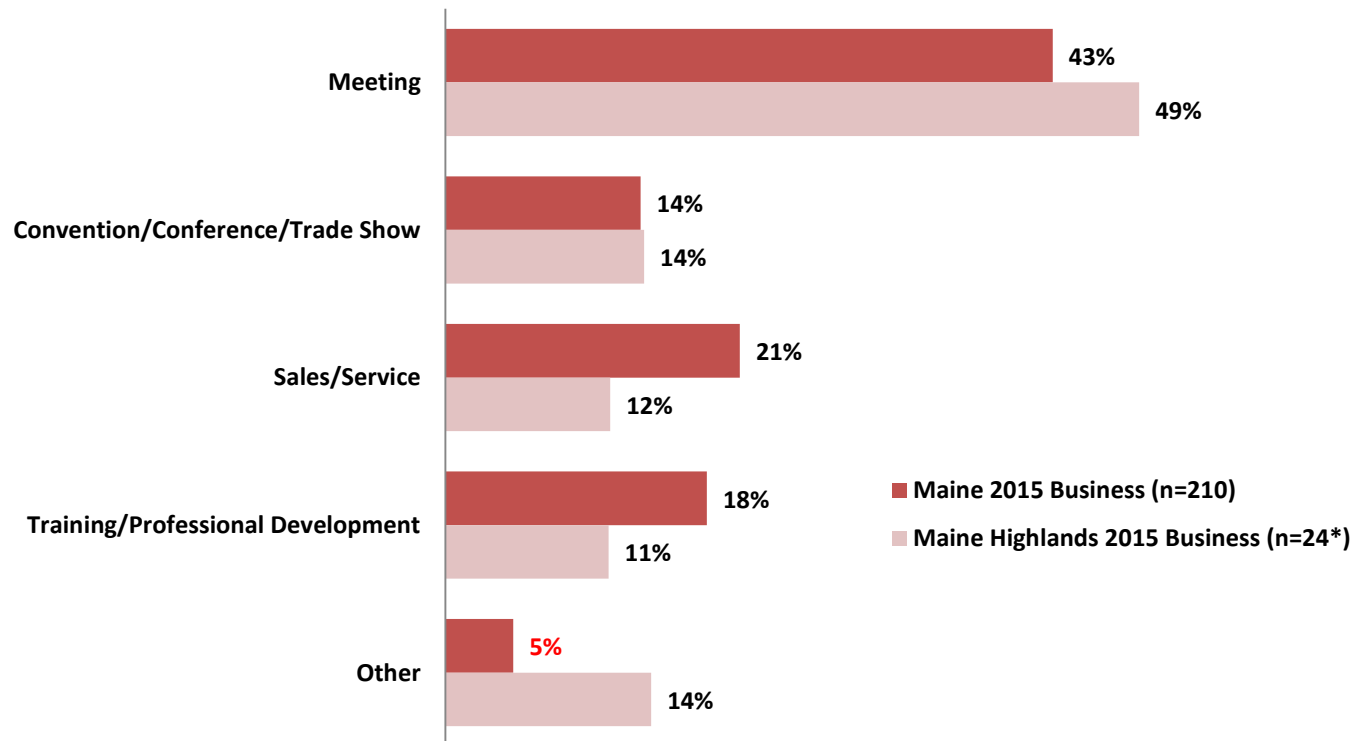
Primary Purpose of Day VFR Trips



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.

Half of business day visitors' primary trip purpose is to attend a meeting in the Maine Highlands region.

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.

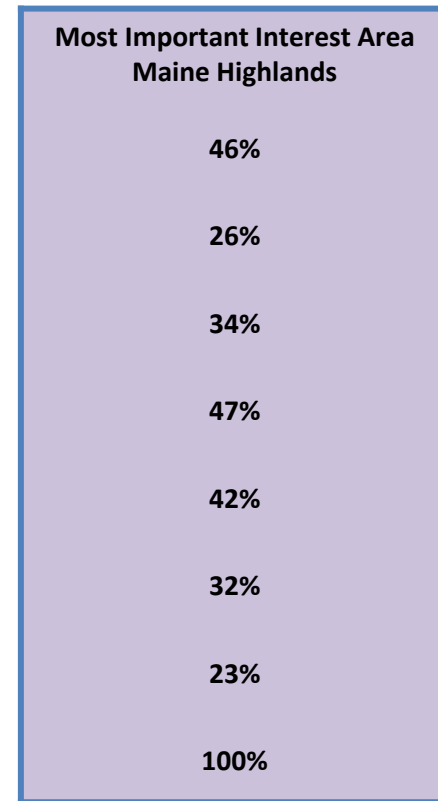
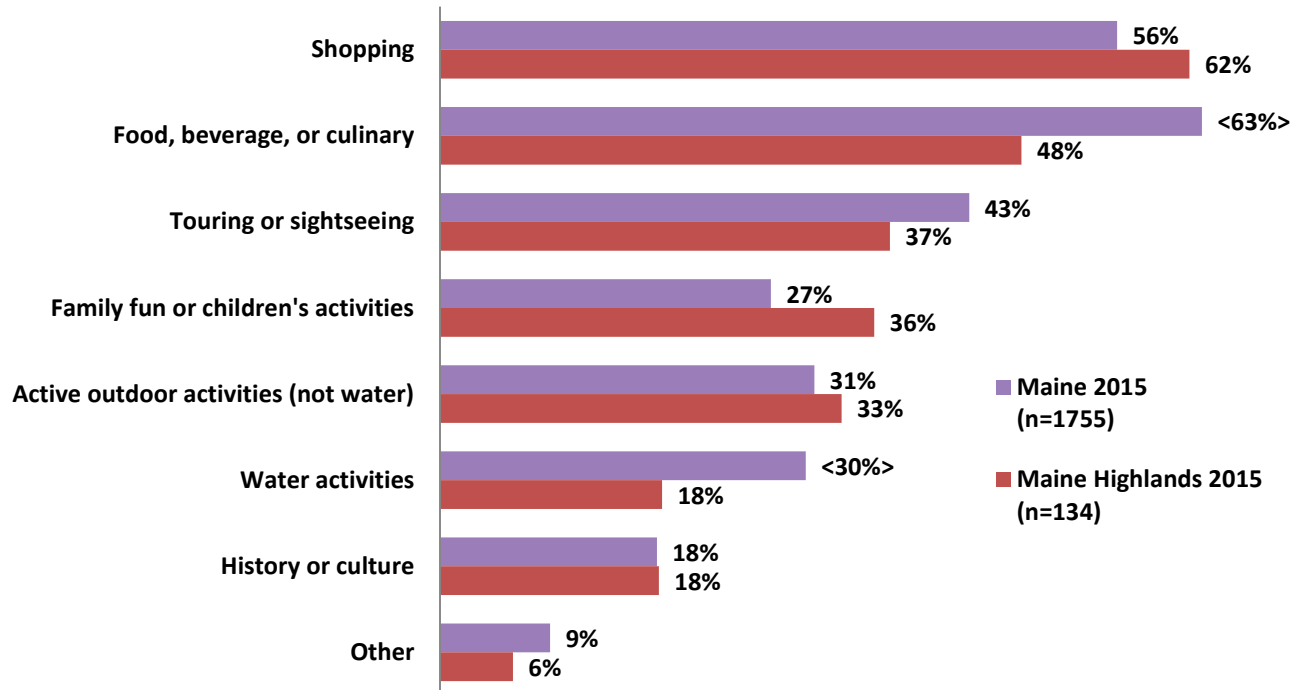
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note very small sample size.

Shopping and food/beverage/culinary activities are the most common interest areas of day visitors to the Maine Highlands.

- Day visitors to the Maine Highlands region are less likely than day visitors to the State of Maine as a whole to be interested in *food/beverage/culinary activities* and *water activities*.

2015 Interest Areas



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

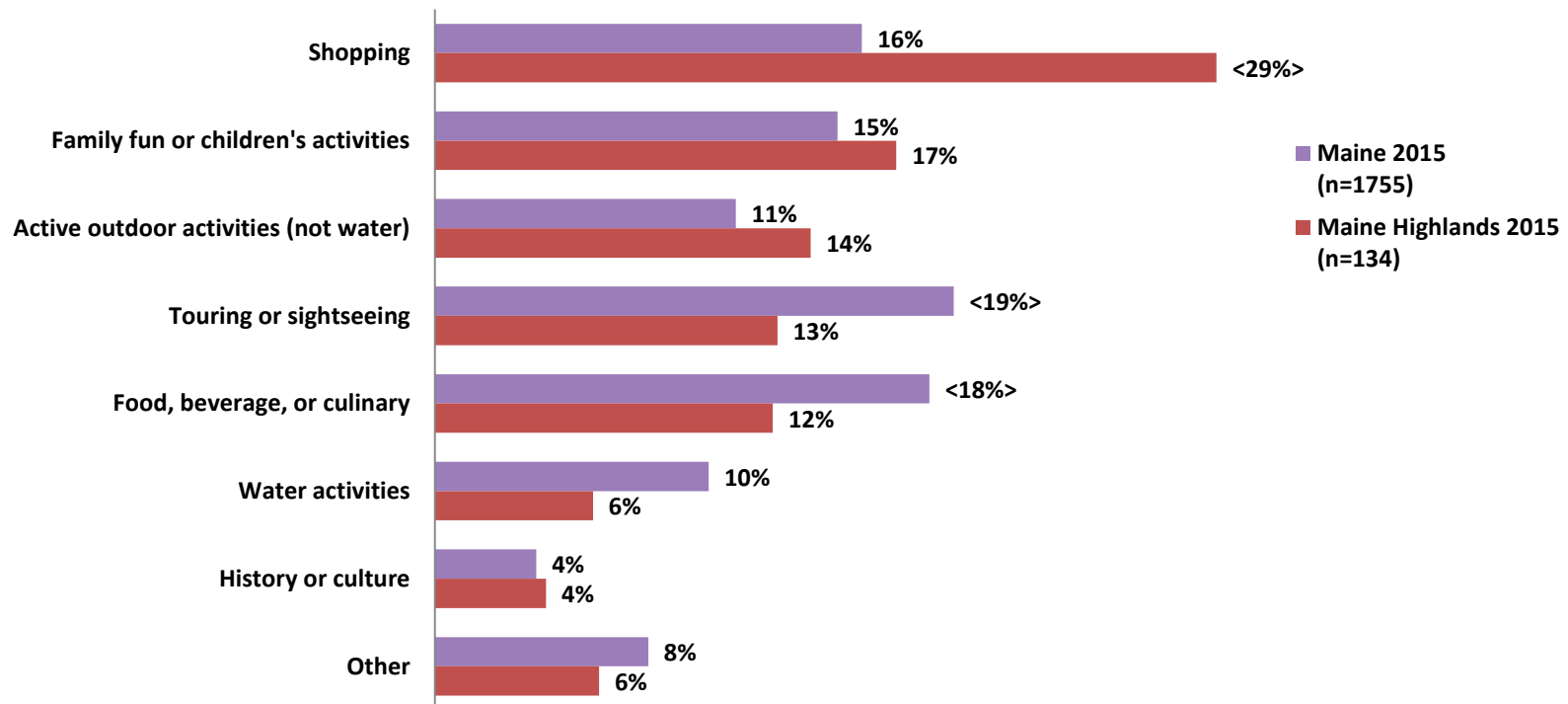
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Shopping is the top ranked activity among Maine Highlands day visitors when analyzing both interest and importance together.

- As compared to day visitors to the State as a whole, a greater proportion of day visitors to the Maine Highlands region rank *shopping* highly when analyzing both interest and importance. Lesser proportions rank *touring/sightseeing* and *food/beverage/culinary activities* highly in the Maine Highlands region.

**2015 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

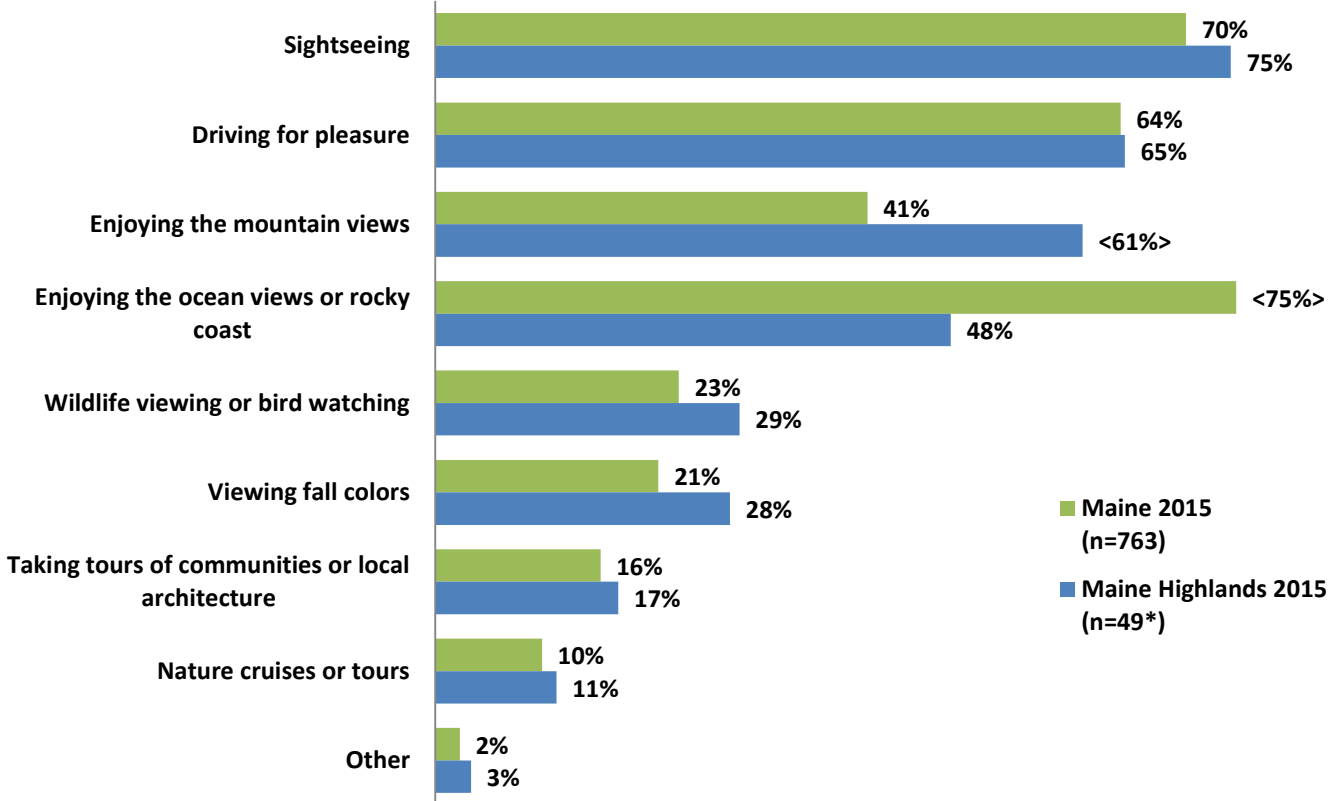
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Sightseeing is the most common touring or sightseeing activity participated in by day visitors to the Maine Highlands.

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.

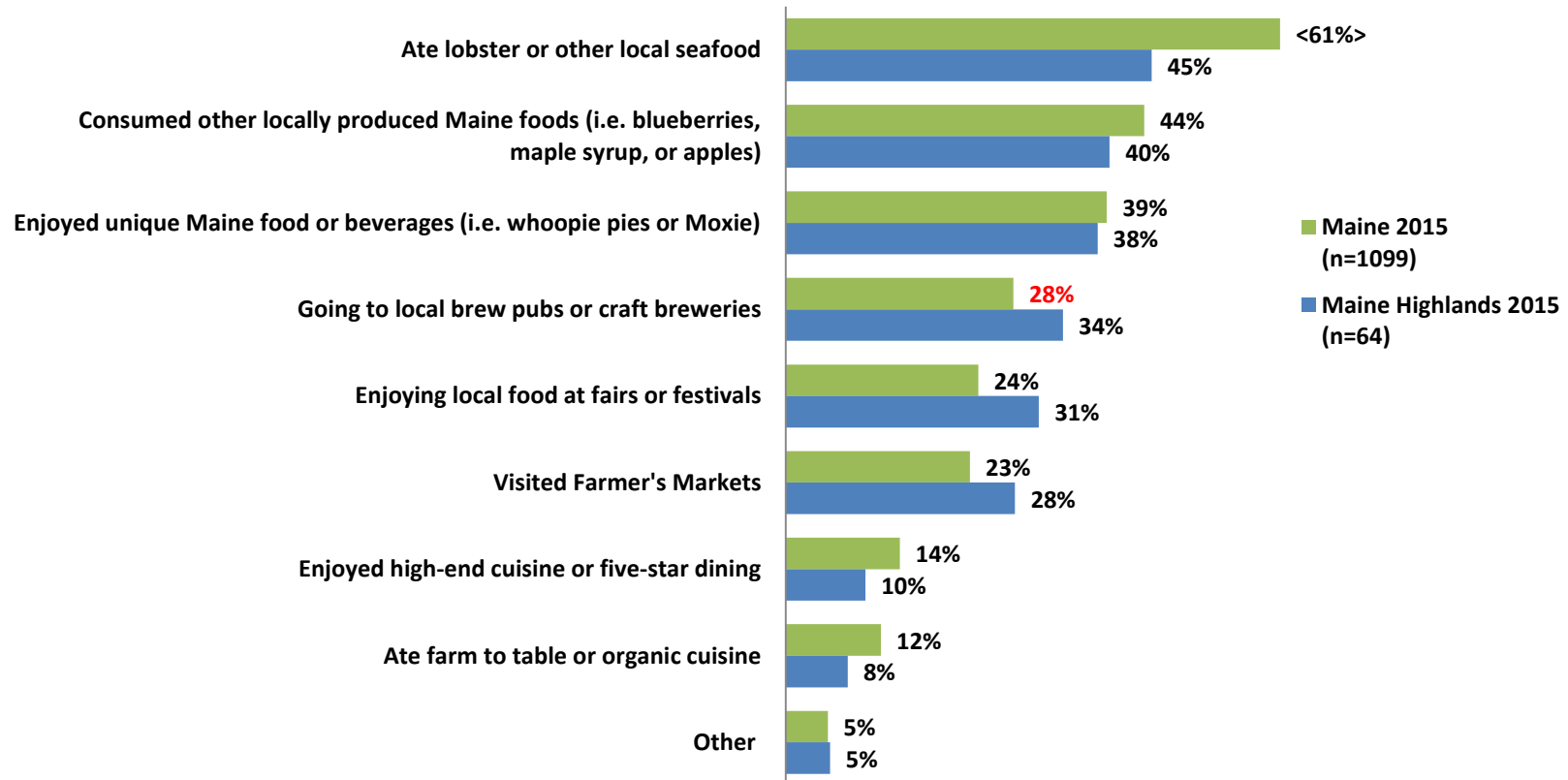
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

Nearly half of participants with food/beverage/culinary interests *ate lobster or 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.

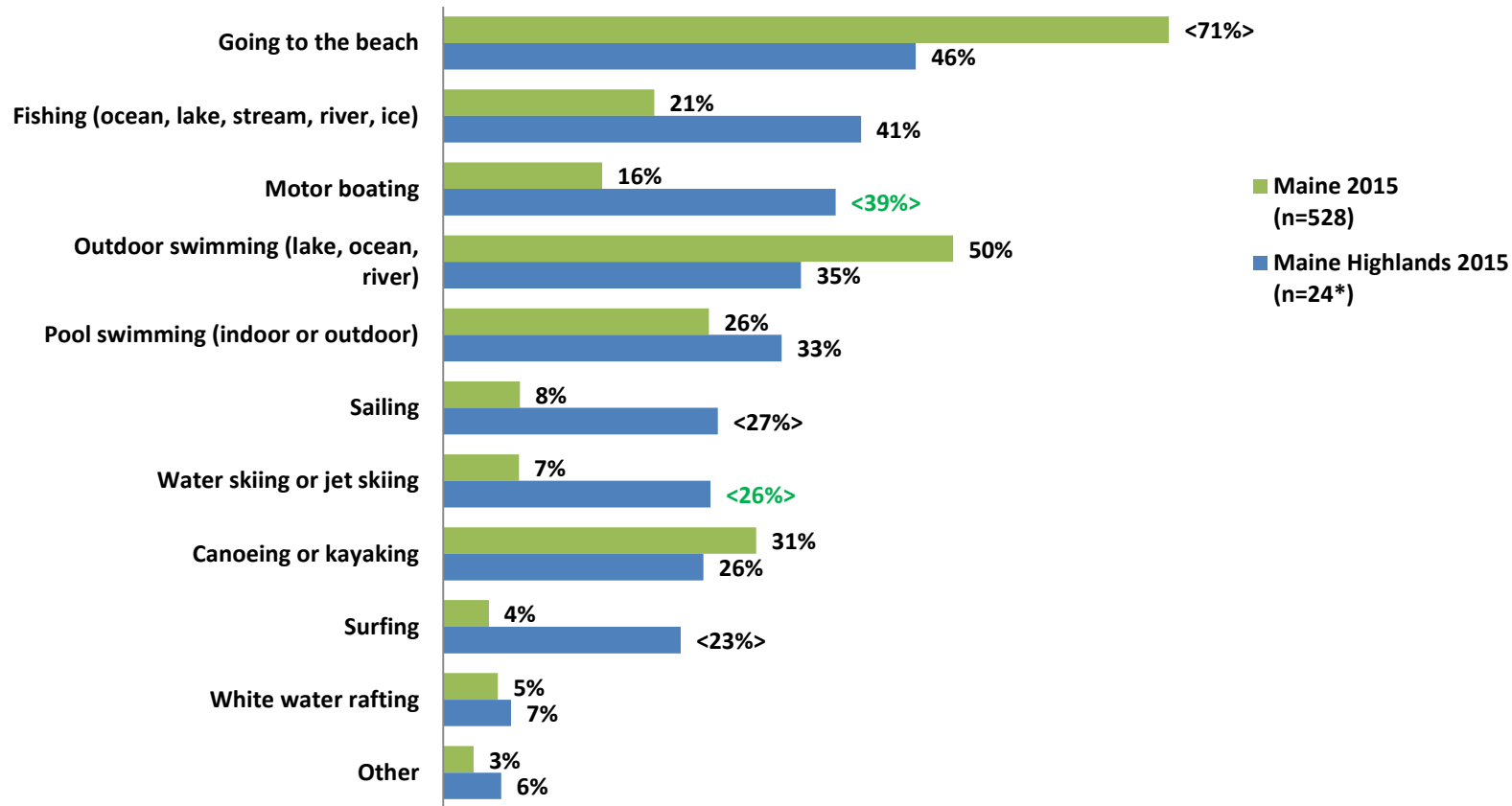
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Going to the beach, fishing, and motor boating are the most common pursuits of day visitors to the region who are interested in water activities.

- Maine Highlands visitors are more likely to go *motor boating, sailing, water/jet skiing, and surfing* compared to Maine visitors overall, and less likely to *go to the beach*.

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.

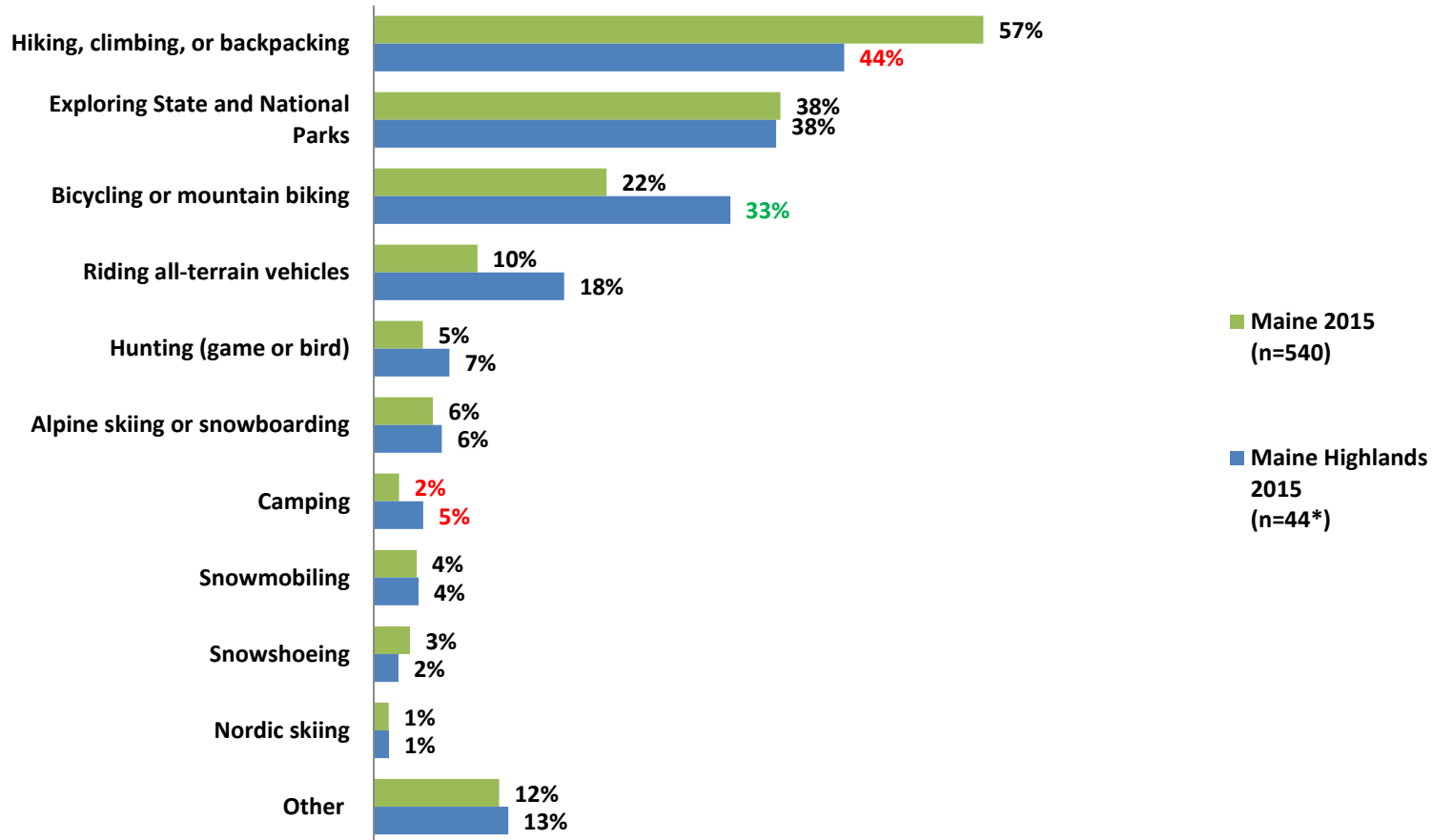
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

About two in five Maine Highlands day visitors who are interested in active outdoor activities go *hiking/climbing/backpacking*.

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.

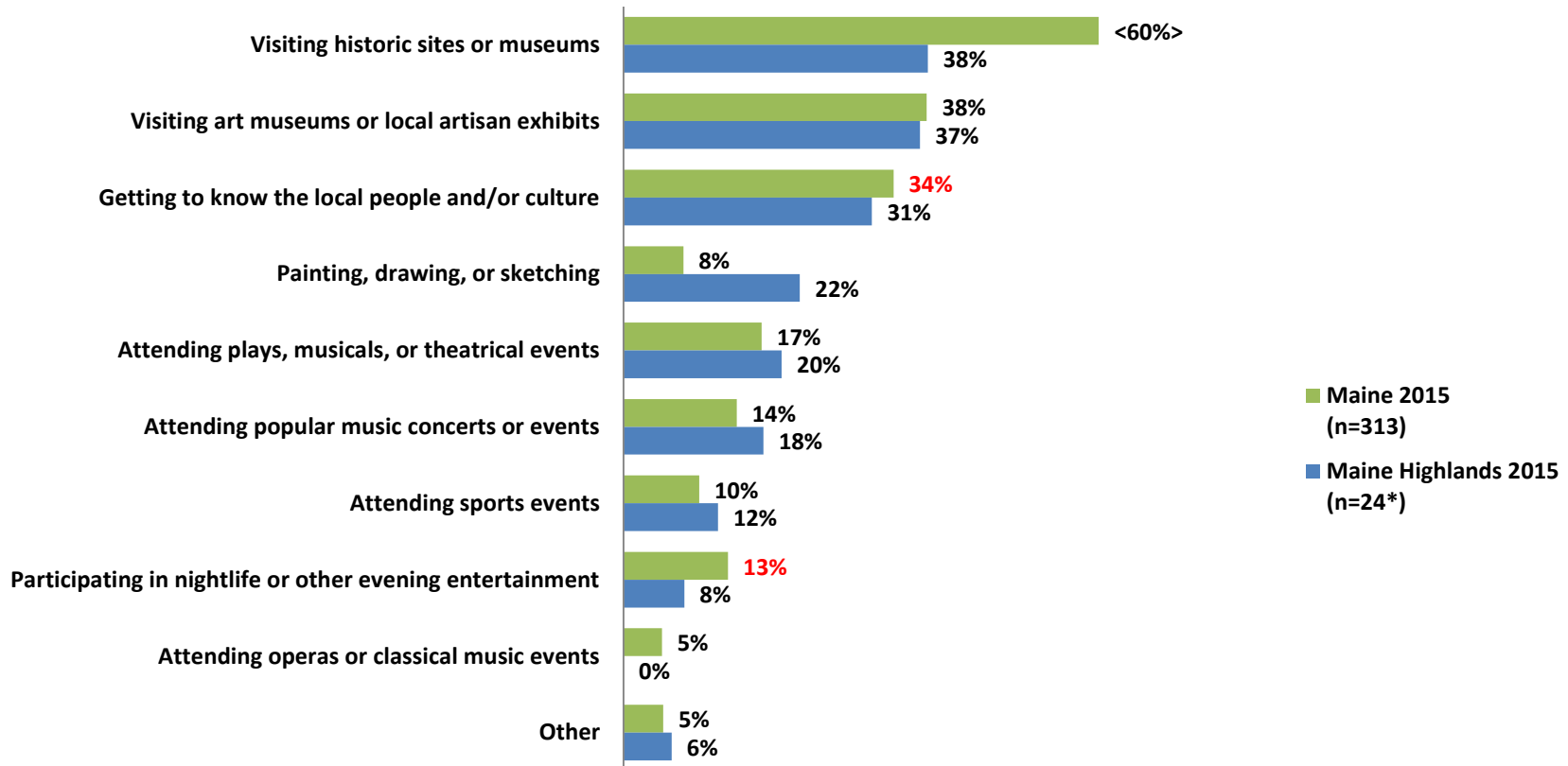
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*Please note small sample size.

Visiting historic sites or museums and visiting art museums are the most common history or culture activities participated in by day visitors.

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.

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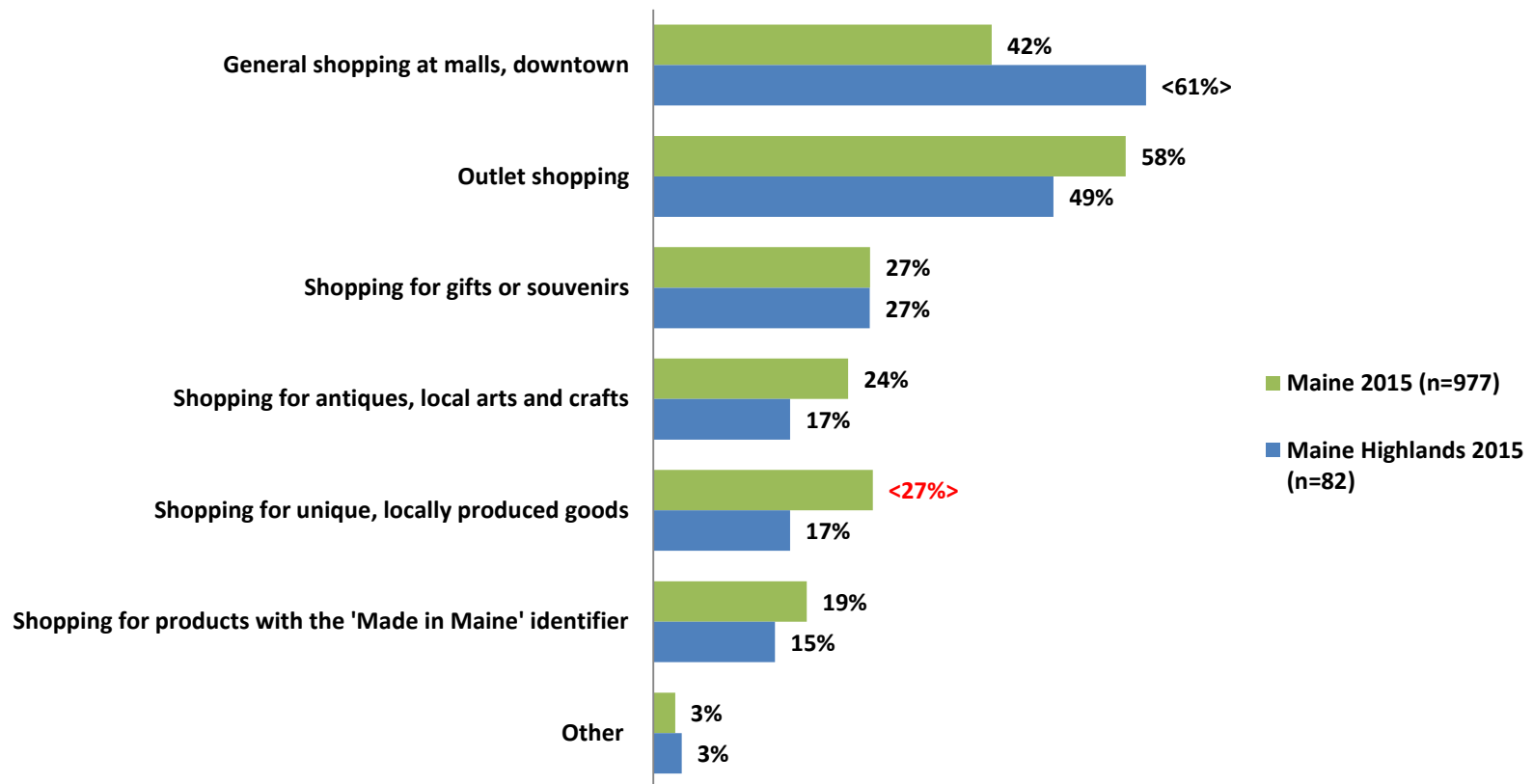
*Please note very small sample size.

Among day visitors to the Maine Highlands region interested in shopping, nearly two-thirds did some *general shopping at malls/downtown*.

- Day visitors to the Maine Highlands region are more likely to shop at malls and downtown and less likely to shop for *unique, locally produced goods* than are day visitors to the State of Maine as a whole .

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.*

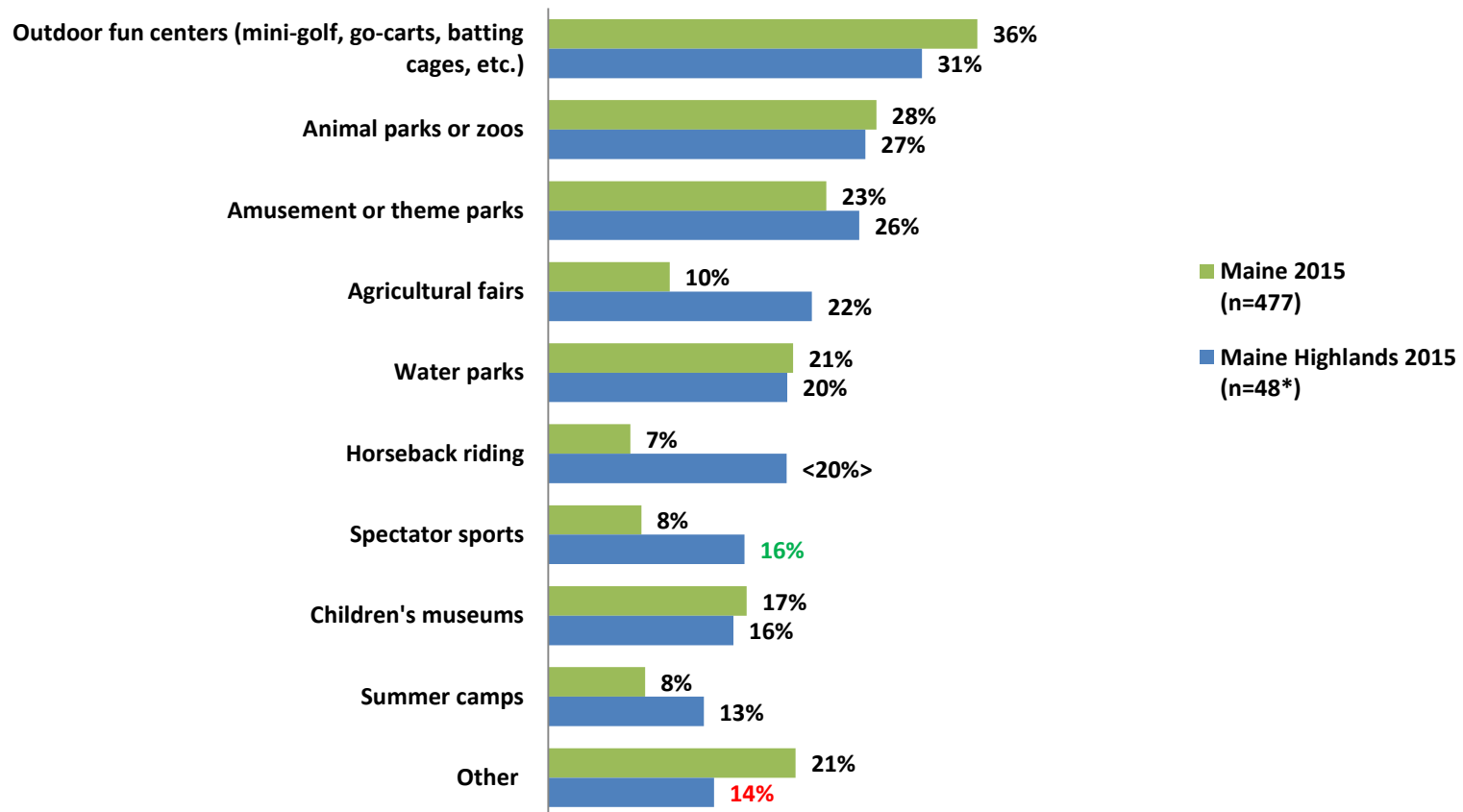
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Outdoor fun centers are the most frequently mentioned activity among day visitors 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



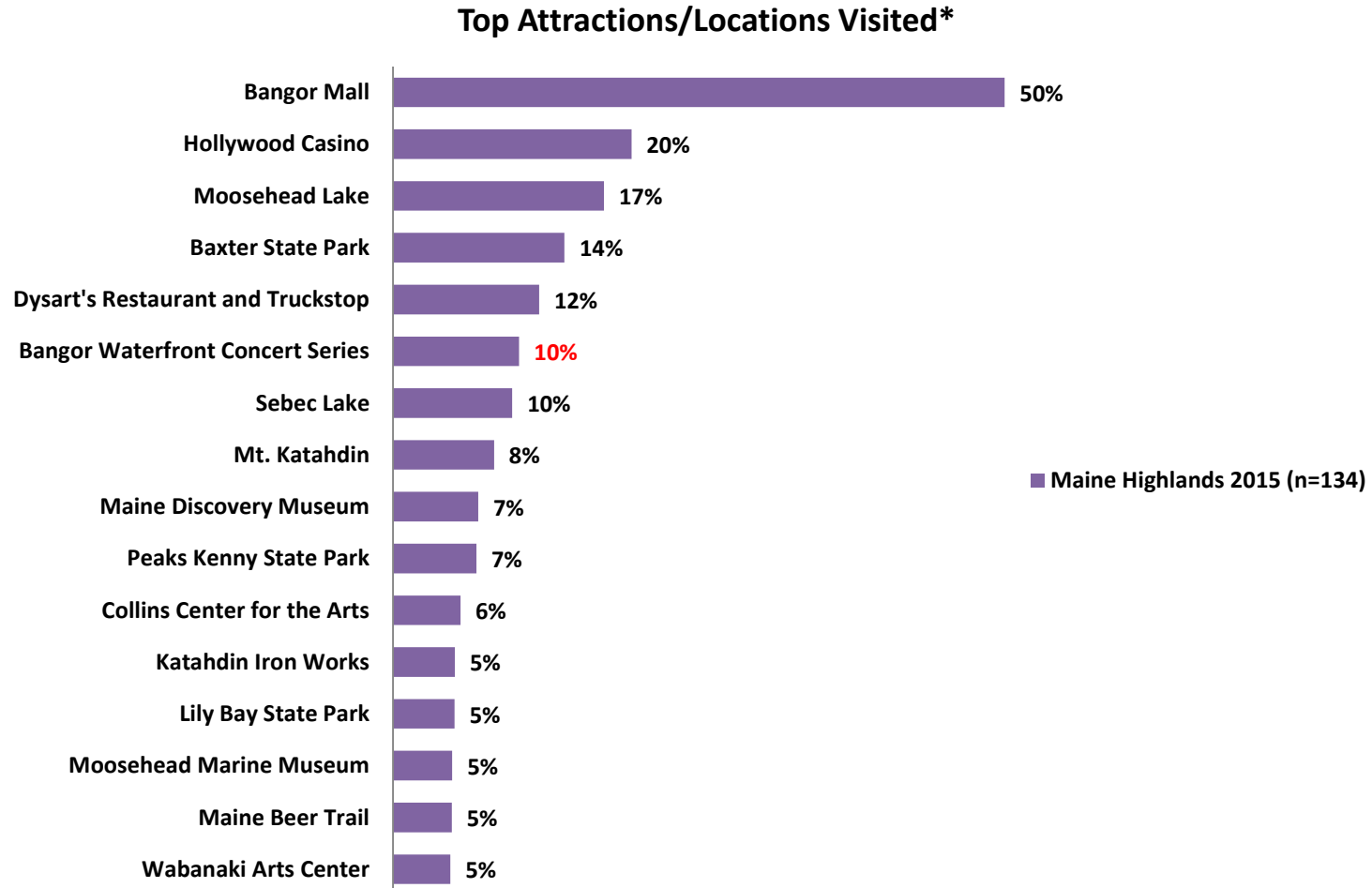
Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

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.

Similar to overnight visitors, day visitors to the Maine Highlands region were most likely to have visited the *Bangor Mall*.



* Does not include response options selected by fewer than 5% of respondents.

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

<> 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.

Note: Does not include response options selected by fewer than 5% of respondents.

Comparison of *Maine Highlands* Visitors to Maine Visitors



Comparisons: Region vs. State

- Visitors to the Maine Highlands 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, and the activities they participate in while visiting.
- Highlights – Maine Highlands region vs. State visitors:

Visitor Origin

- **A higher proportion** of overnight and day visitors to the region from **Canada**.
- **A lower proportion** of overnight and day visitors to the region from **the United States**.
- **A lower proportion** of day visitors from **Massachusetts** and **New Hampshire**.

Visitor Demographics

- Both overnight and day visitors to the region have **lower annual household incomes**, are **younger** on average, and **more likely to be employed full-time**.
- Day visitors to the region are **less likely to have a college degree**.

Comparisons: Region vs. State

- Highlights Continued:

Trip Interest Areas – Overnight and Day Visitors

- Less likely to want to pursue **food/beverage/culinary** interests.

Trip Interest Areas – Day Visitors

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

Maine Trip Interests and Importance (Importance Index)

Overnight and Day Visitors

- More likely to place importance on **shopping**.
- Less likely to place importance on **food/beverage/culinary activities**.

Day Visitors

- Less likely to place importance on **touring/sightseeing**.

Overnight Visitors

- Less likely to place importance on **water activities**.

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight and Day Visitors

- **More likely to be:**
 - General shopping at malls or downtown
 - Enjoying the mountain views
- **Less likely to be:**
 - Enjoying ocean views or rocky coast
 - Eating lobster or other local seafood
 - Going to the beach
 - Shopping for unique, locally produced goods

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More likely to be:**
 - Enjoying the mountain views
 - Wildlife viewing or bird watching
 - Consuming other locally produced Maine foods (i.e., blueberries, maple syrup, or apples)
 - Enjoying local food at fairs or festivals
 - Riding all-terrain vehicles
 - Snowshoeing
 - Nordic skiing
 - Painting, drawing, or sketching
 - Attending sports events
 - Attending operas or classical music events
- **Less likely to be:**
 - Hiking, climbing, or backpacking

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Day Visitors

- **More likely to be:**
 - Motor boating
 - Sailing
 - Water skiing or jet skiing
 - Surfing
 - Horseback riding
- **Less likely to be:**
 - Visiting historic sites or museums



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