

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

## *Regional Insights: Maine Lakes & Mountains*

*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 Lakes & Mountains** tourism region during 2015, 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 2014 and 2015 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

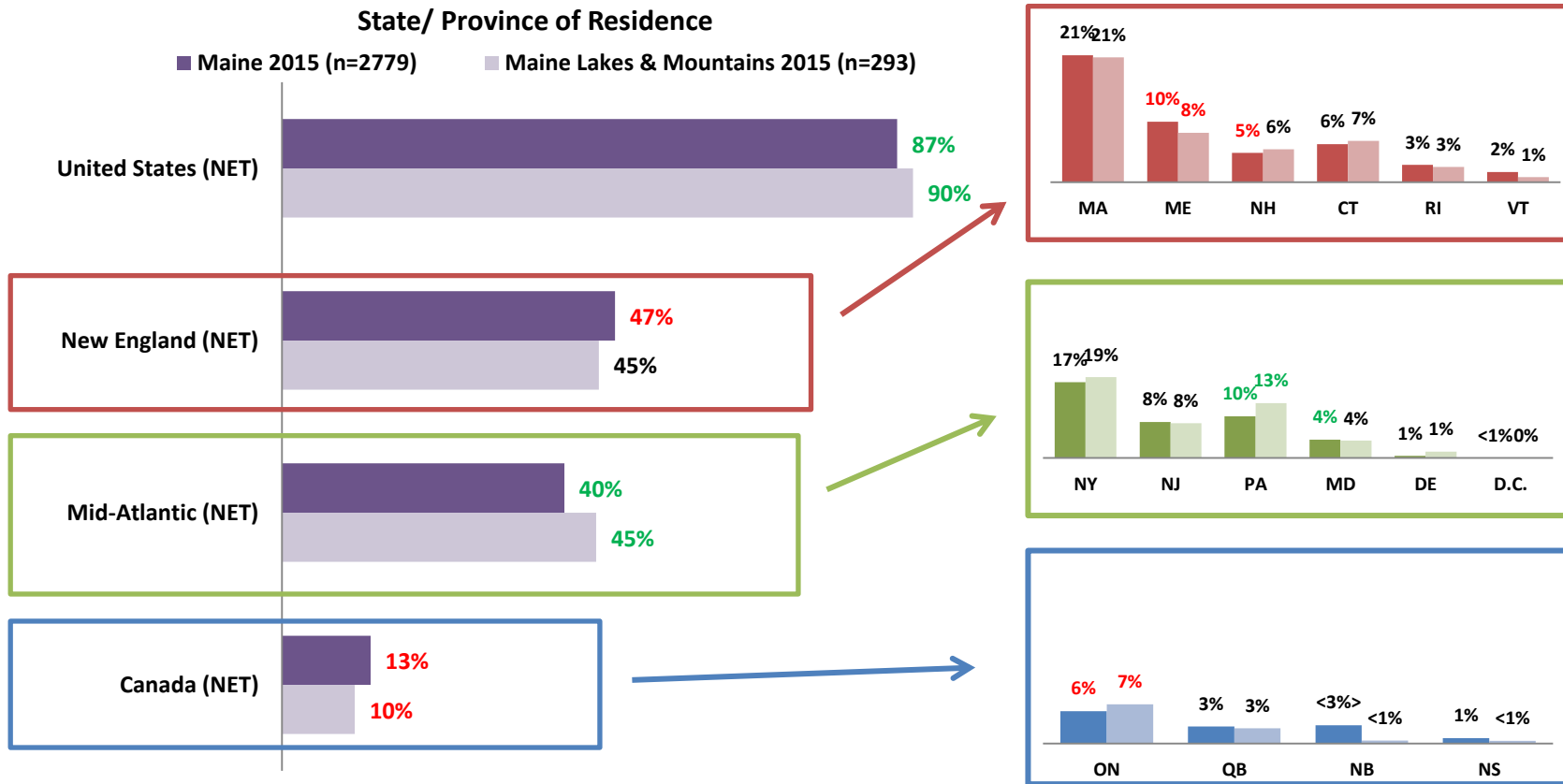
- Overnight visitors to the Maine Lakes & Mountains tourism region are 42 years old, on average, and have annual household incomes around \$90,000. Two-thirds have at least a college degree and are employed full-time. Sixty-one percent are married.
- Overnight visitors to the Maine Lakes & Mountains trend younger and have lower average annual household incomes than visitors to Maine overall. In addition, this region's visitors are less likely to have a college degree than are visitors to the State as a whole.

Overnight Visitors	Maine 2015 (n=2779)	Maine Lakes & Mountains 2015 (n=293)
Age:		
< 35	30%	34%
35 - 44	19%	25%
45 - 54	19%	19%
55 +	<31%>	22%
Mean Age (Years)	<45.4>	42.3
Income:		
< \$50,000	17%	<23%>
\$50,000 - \$99,999	41%	41%
\$100,000 +	<42%>	36%
Mean Income (Thousands)	<\$103,770>	\$90,670
Female	58%	54%
College Degree or Higher	<73%>	66%
Married	64%	61%
Employed Full Time	63%	67%

<> 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 overnight visitors to the Maine Lakes & Mountains region come from the United States.



State/ Province of Residence

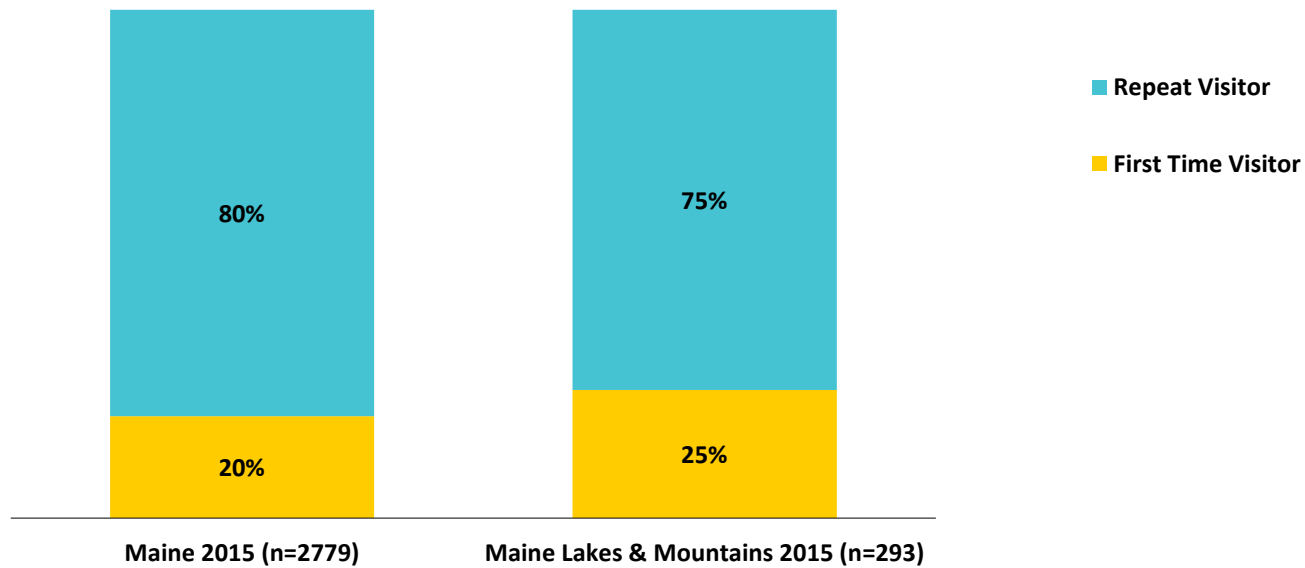
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Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# One-fourth of overnight visitors to the Maine Lakes & Mountains are first-time visitors to Maine.

## Repeat vs. First Time Visitors



Q11. Was this your first visit in Maine?

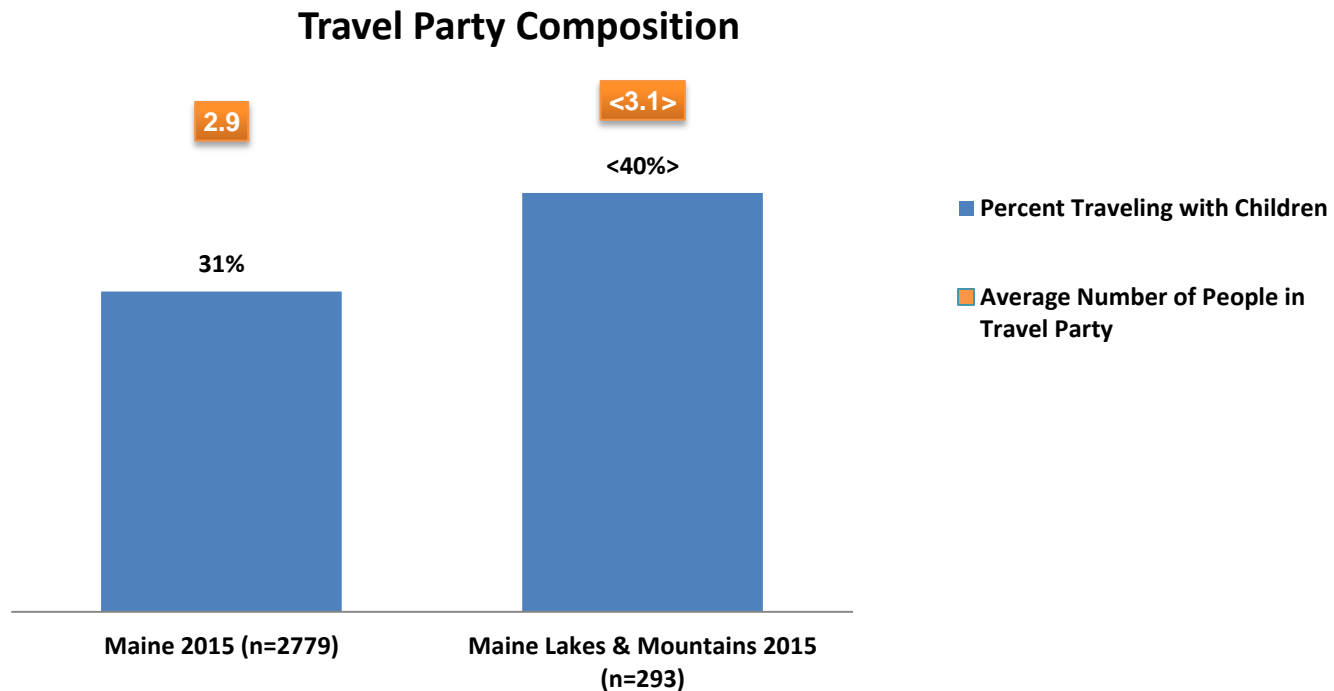
Q12. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

<> 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 in five overnight visitors to the Lakes & Mountains region is traveling with children.

- Overnight visitors to this region are more likely to be traveling with children than are overnight visitors to the State of Maine as a whole.



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.

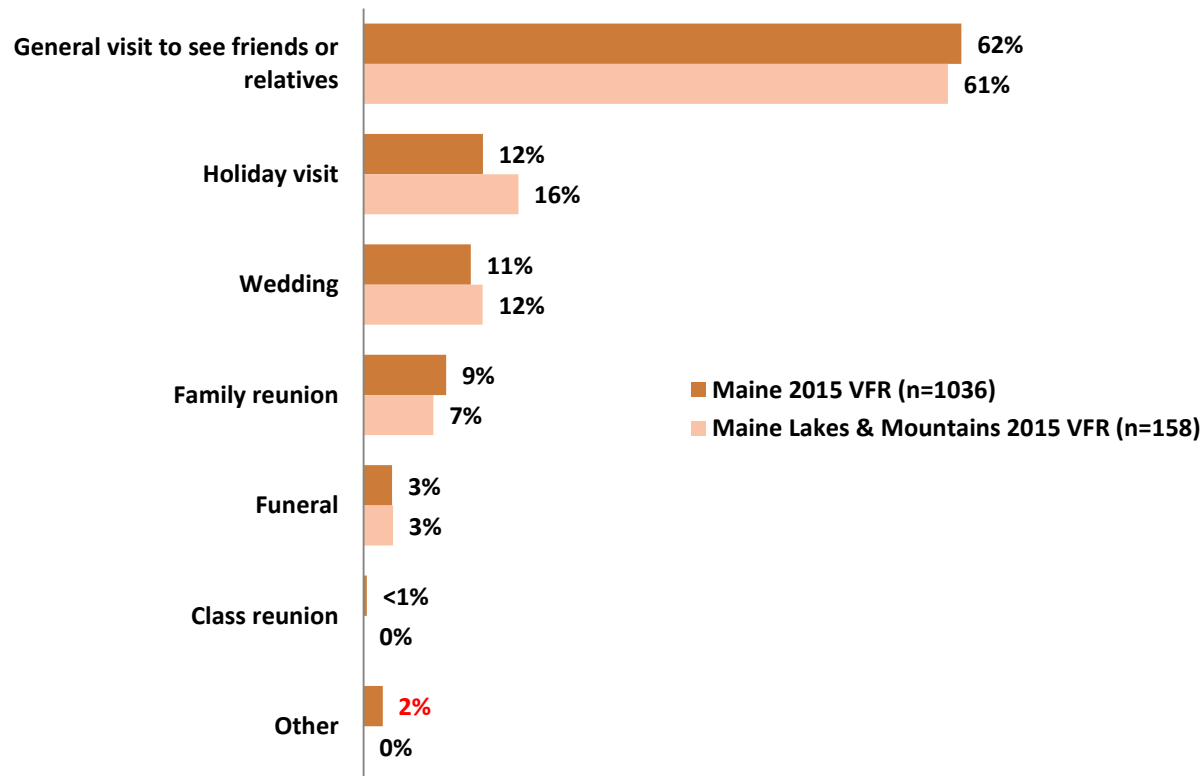
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight Visitors: *Trip Experience*



# Overnight VFR travelers 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



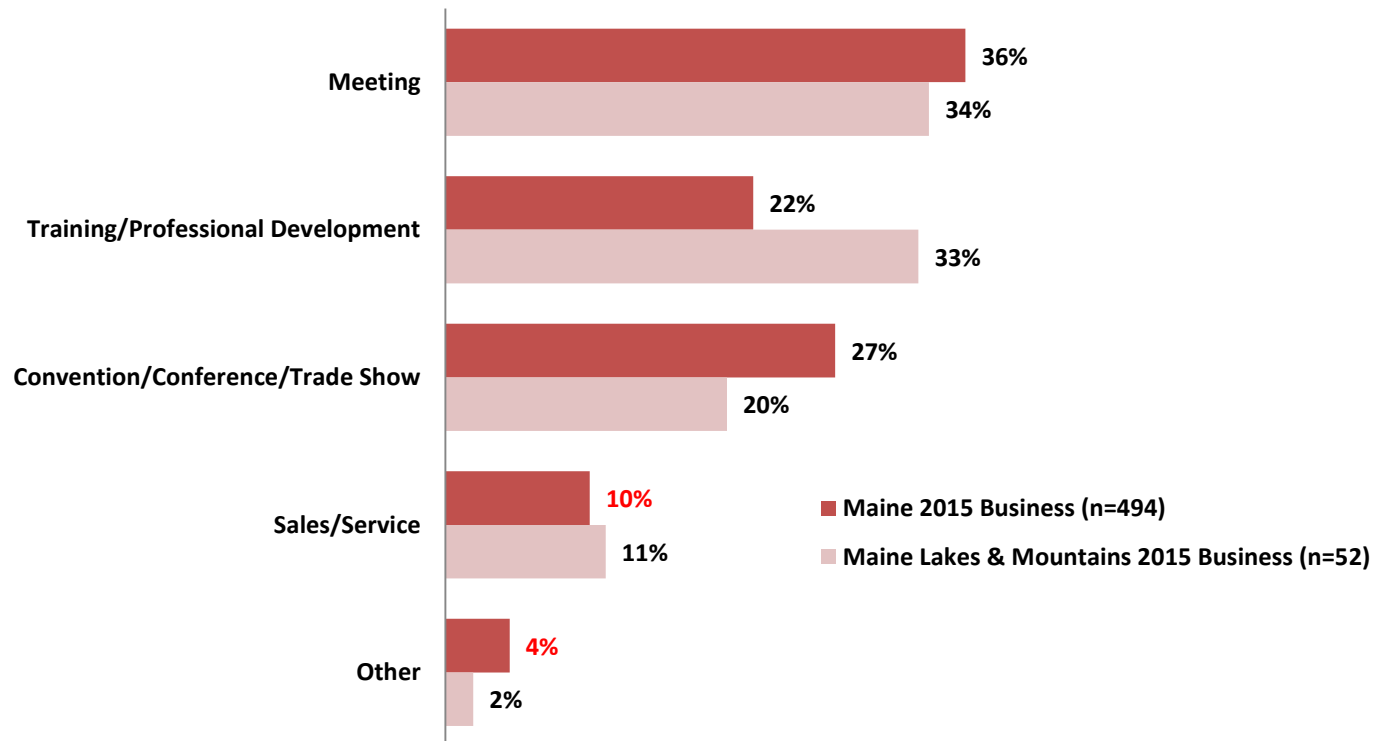
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> 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 *meeting* or for *training/professional development*.

## Primary Purpose of Overnight Business Trips



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

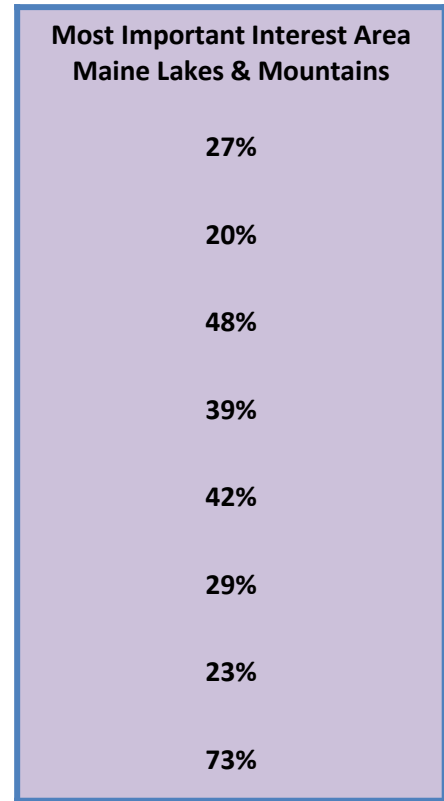
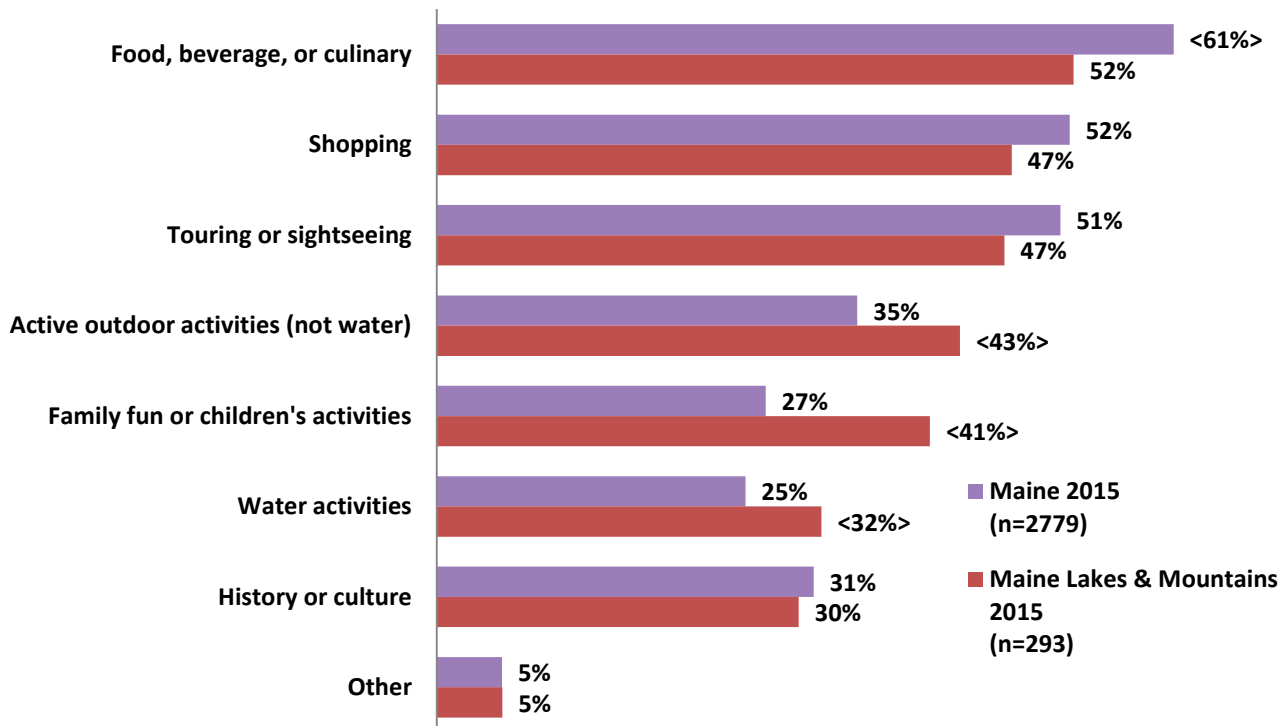
<> indicates a significant difference between subgroups at the 95% confidence level.

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 area among overnight visitors to the Lakes & Mountains.

- Though *food/beverage/culinary* activities are the most common interest among overnight visitors to the Maine Lakes & Mountains, visitors to this region are less likely than visitors to the State overall to be interested in these activities.
- Overnight visitors to the Lakes & Mountains region are more likely to have an interest in *active outdoor activities, family fun/children's activities, and water activities* than are overnight visitors to the State as a whole.

2015 Interest Areas



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

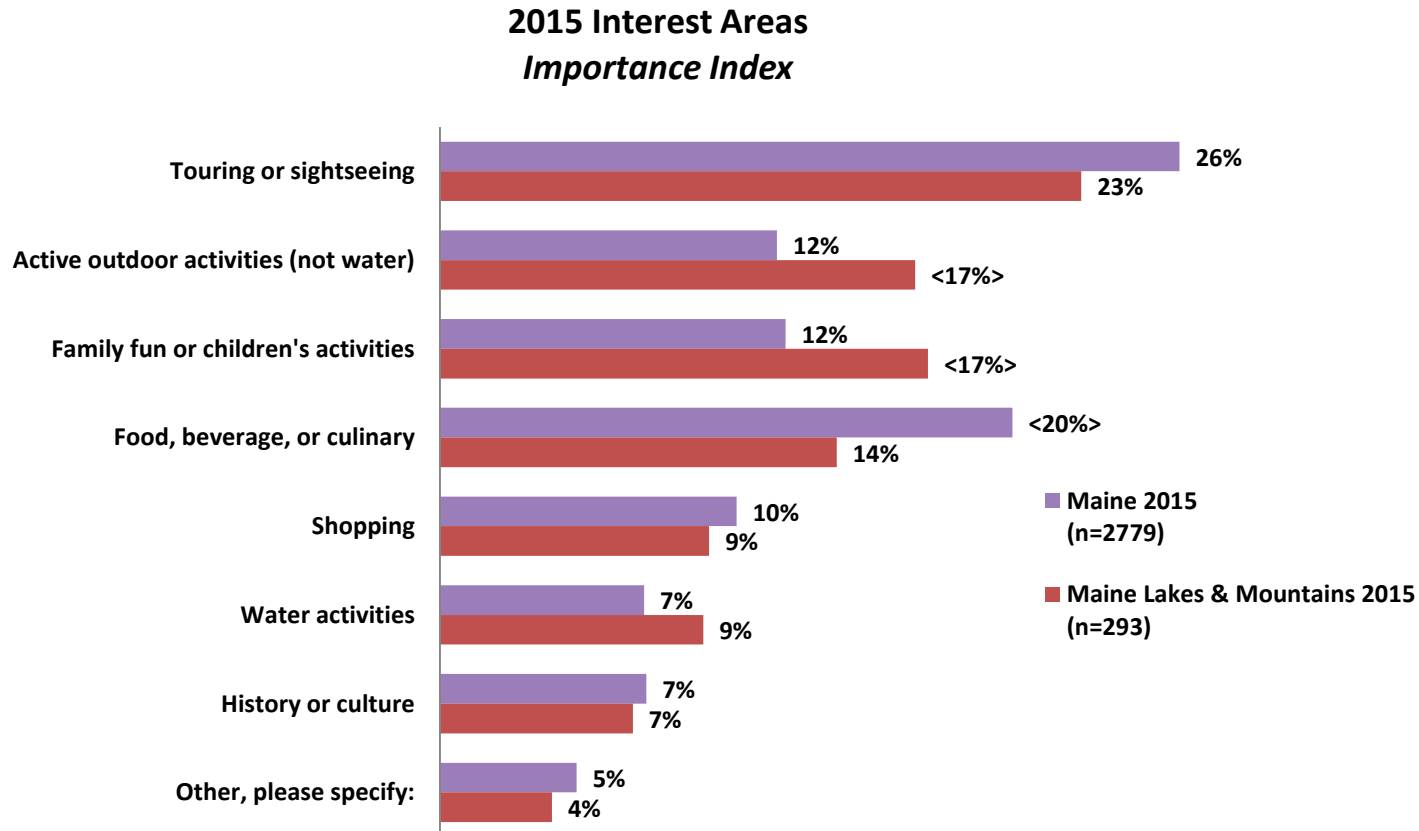
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 14

<> 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/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 – *active outdoor activities* and *family fun/children’s activities*. *Food/beverage/culinary* activities are ranked lower among visitors to this region than among visitors to Maine overall.



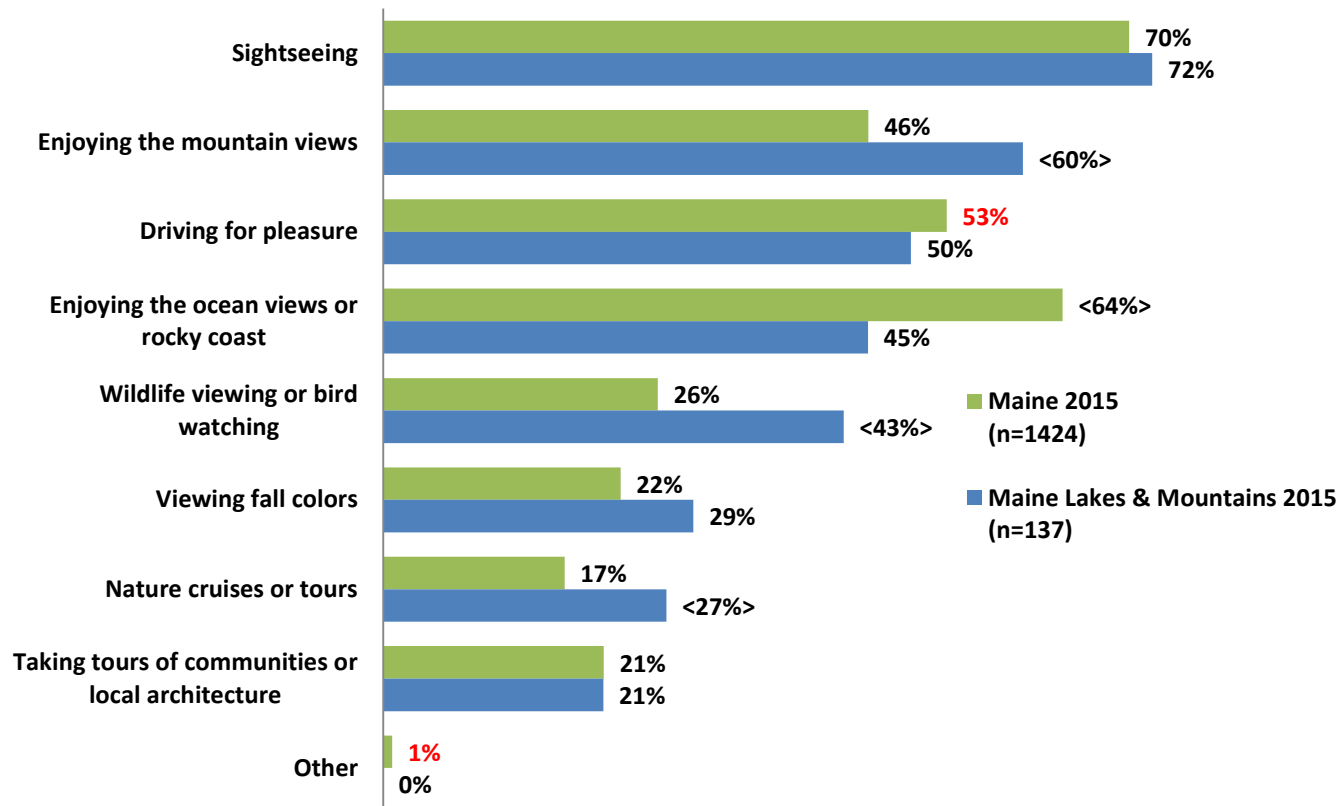
**Importance Index** = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

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

- Overnight visitors to the Maine Lakes & Mountains region are more likely than overnight visitors to the State as a whole to spend time *enjoying the mountain views, wildlife viewing/bird watching, and taking nature cruises or tours.*

## 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.

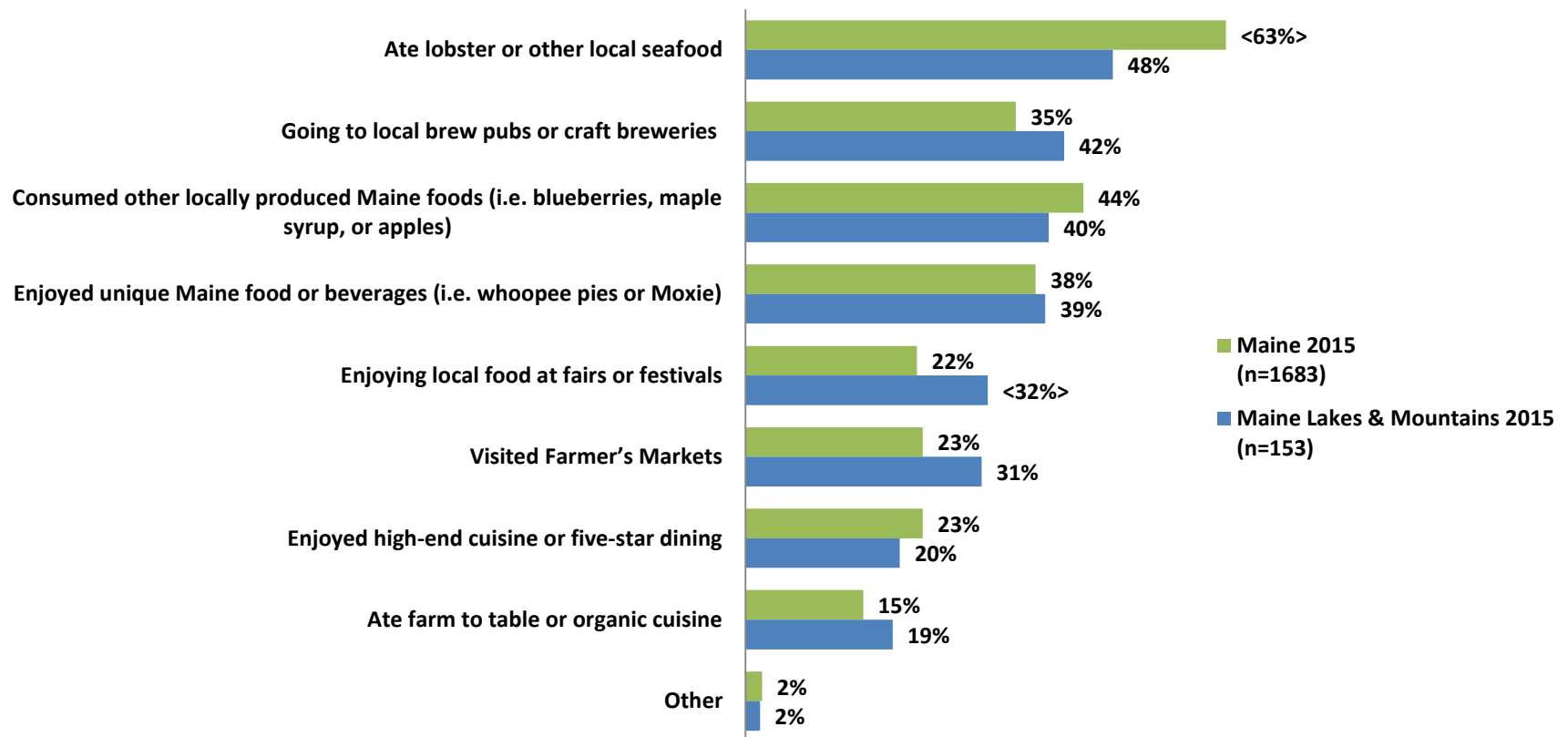


# The top food/beverage/culinary activity among overnight visitors to this region is *eating lobster or other seafood*.

- Though *eating lobster or other local seafood* is the most common food/beverage/culinary activity among overnight visitors to the Maine Lakes & Mountains, visitors to this region are less likely than visitors to the State overall to eat lobster or local seafood.

## 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.

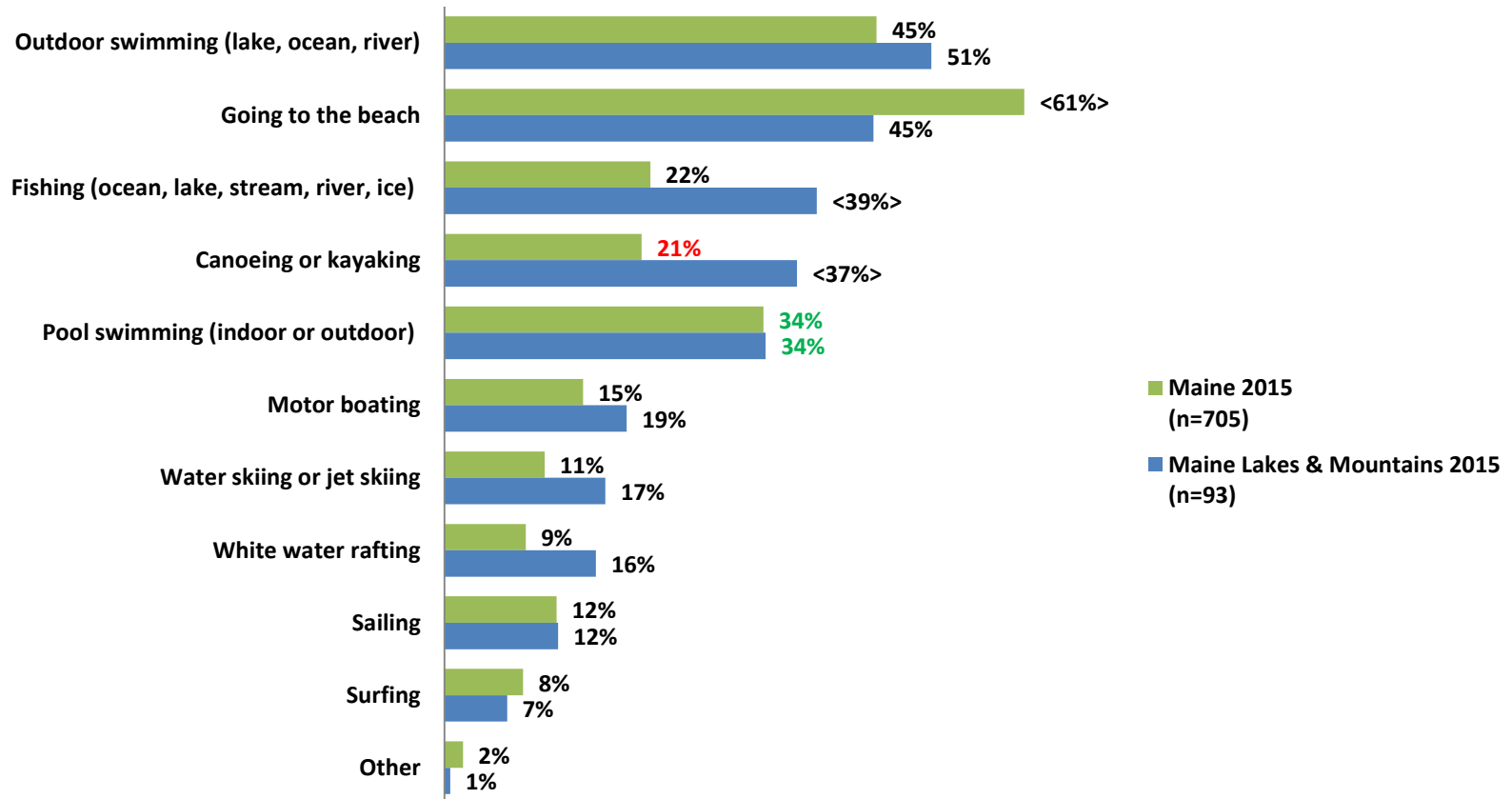
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

- Fishing and canoeing/kayaking are more popular in this region, as compared to the State of Maine overall. 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.

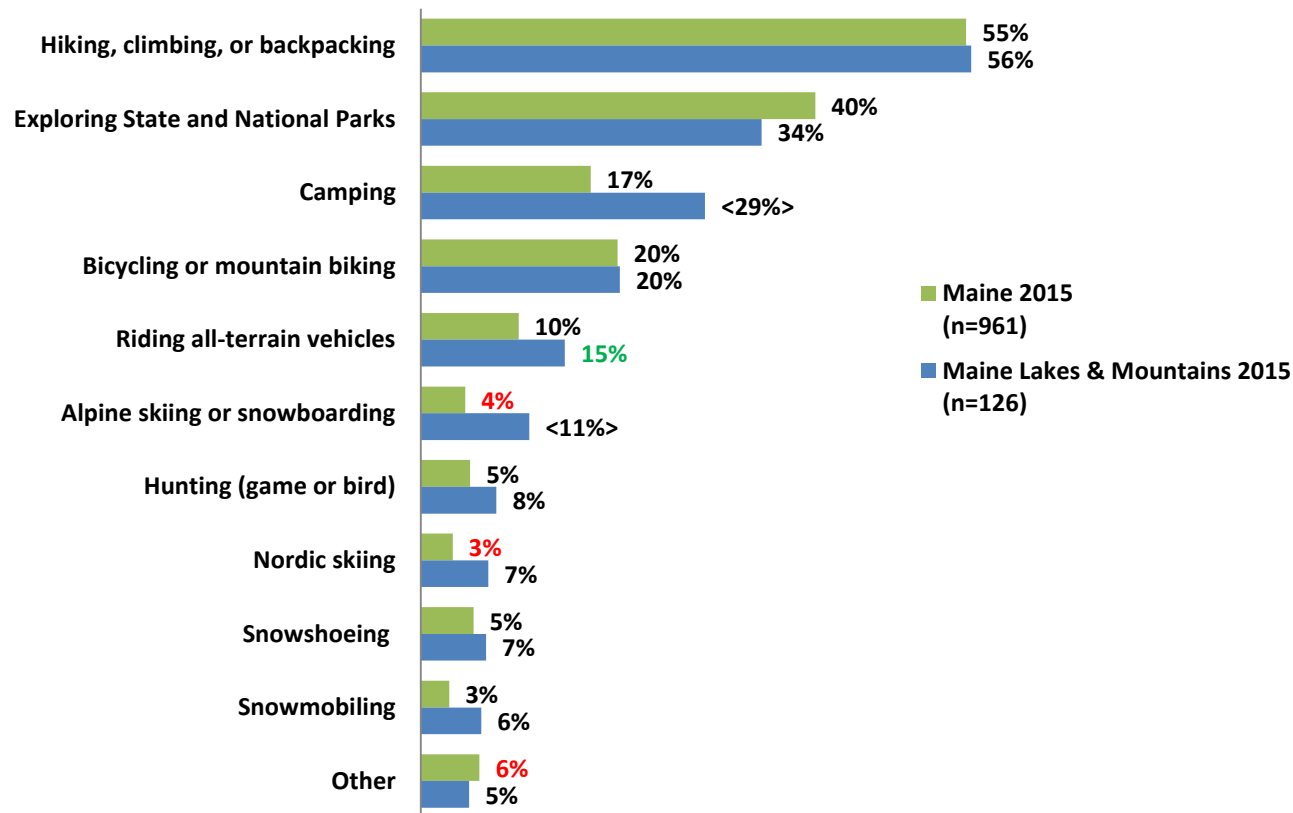
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Hiking/climbing/backpacking is the most common activity among overnight visitors who are interested in active outdoor activities.

- Overnight visitors to the Lakes & Mountains region who are interested in active outdoor activities are more likely to go *camping* and *alpine skiing or snowboarding* as compared to 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.*

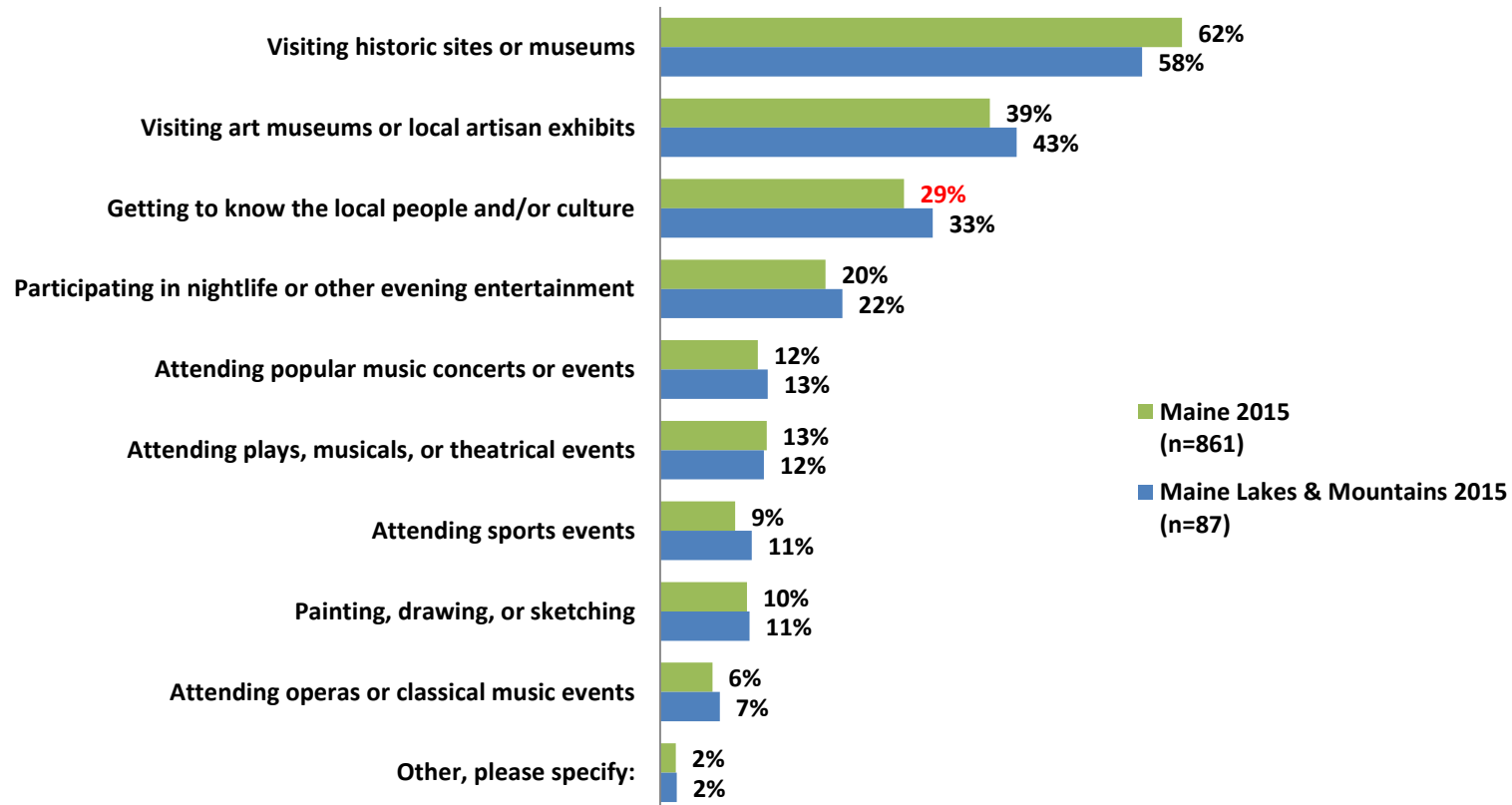
<> indicates a significant difference between subgroups at the 95% confidence level.

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

# Over half of overnight visitors interested in history or culture *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.

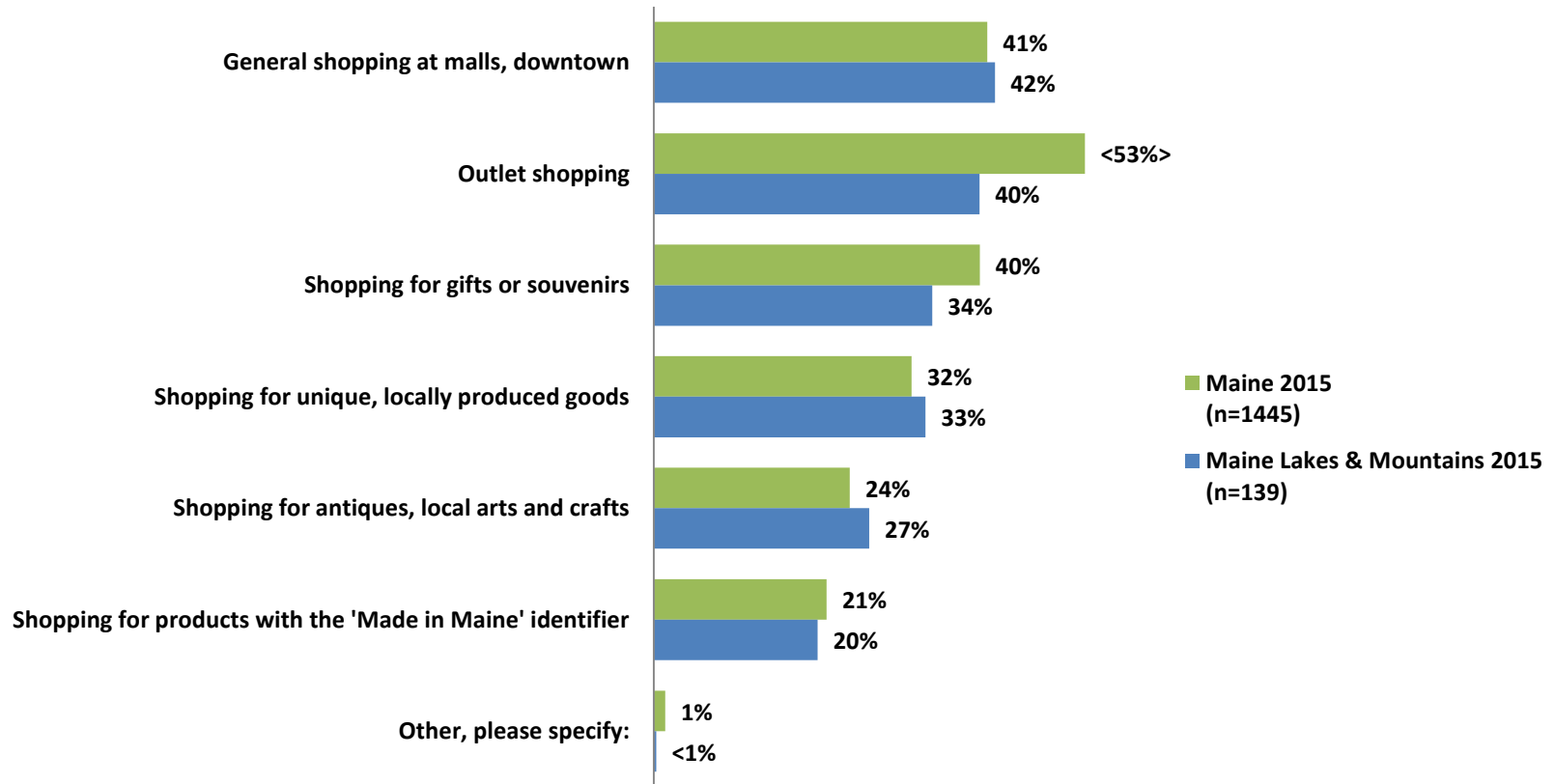
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Overnight visitors to the region who are interested in shopping are most likely to *shop at malls/downtown* or go *outlet shopping*.

- *Outlet shopping* is less popular among overnight visitors to the Lakes & Mountains region than it is among overnight visitors to the State as a whole.

## 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.*

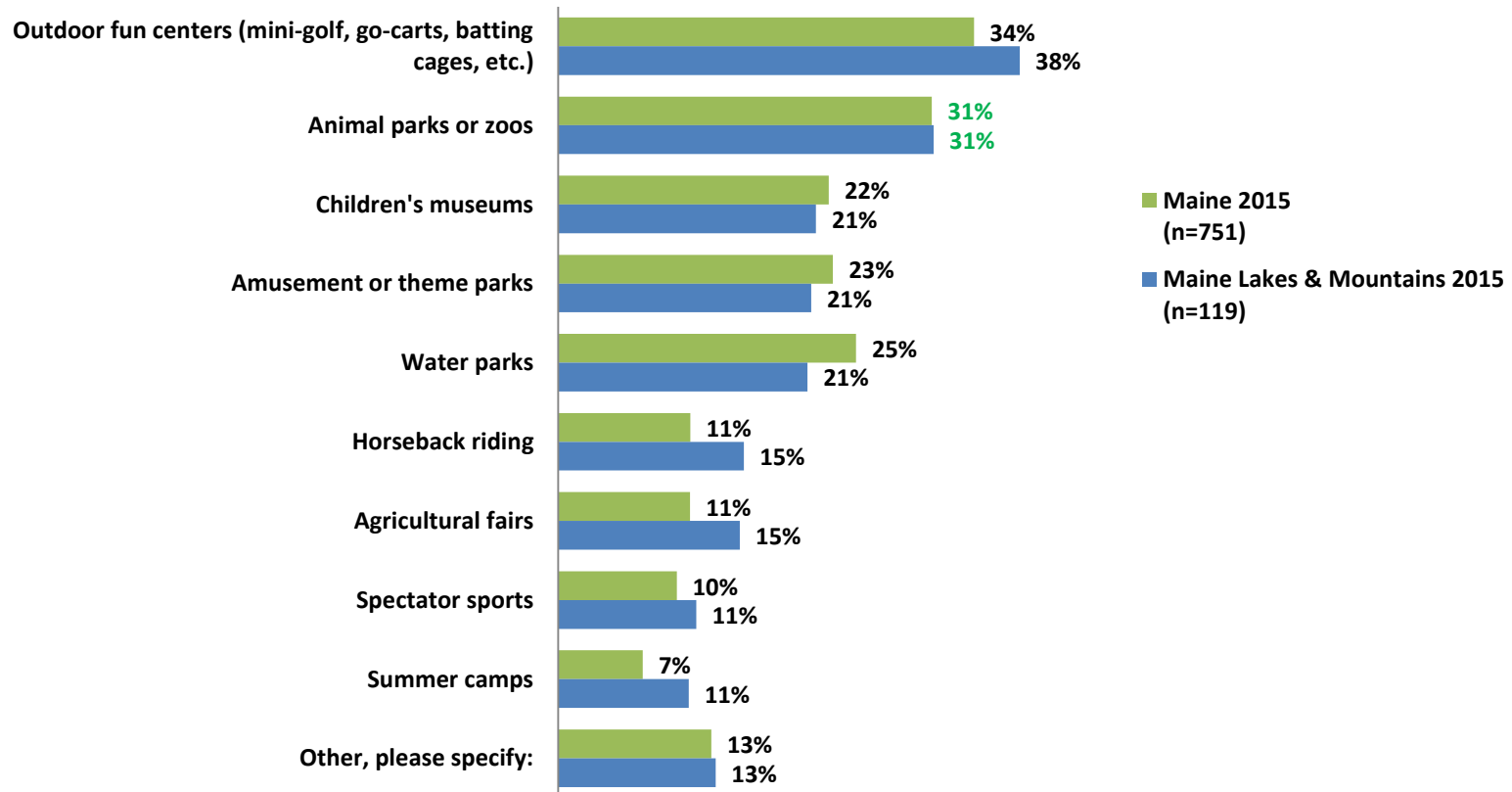
<> indicates a significant difference between subgroups at the 95% confidence level.

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

# Nearly two in five 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



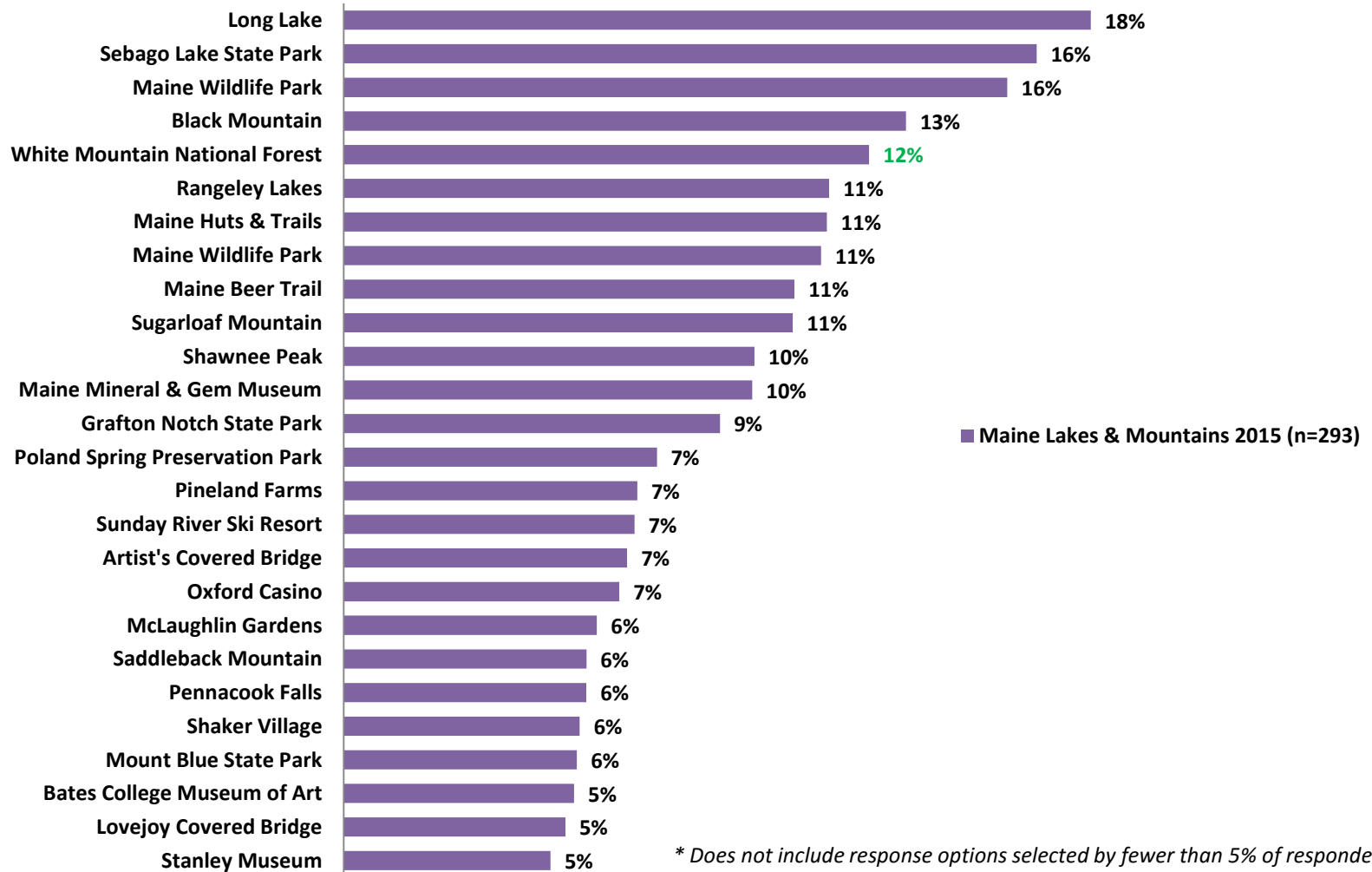
Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

# Overnight visitors to the Lakes & Mountains region are most likely to visit *Long Lake, Sebago Lake State Park, and the Maine Wildlife Park.*

## Top Attractions/Locations Visited\*



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

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

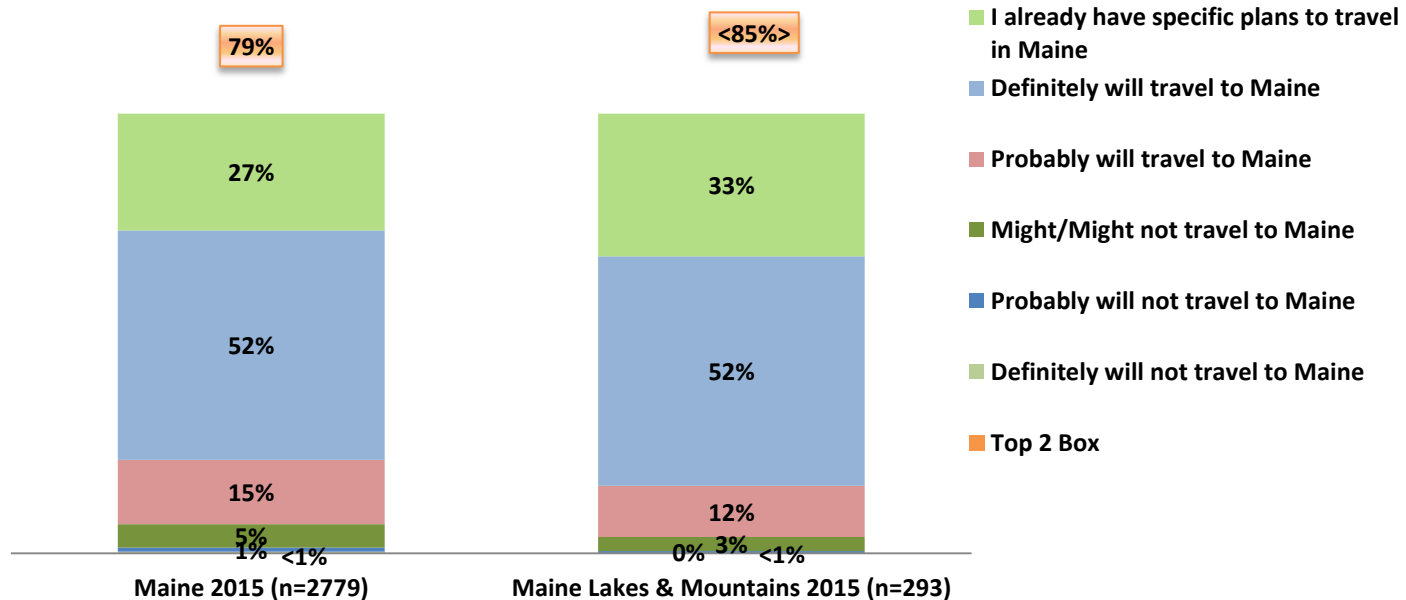
. <> indicates a significant difference between subgroups at the 95% confidence level.

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# More than four in five overnight visitors plan to visit Maine again in the future.

- Overnight visitors to the Maine Lakes & Mountains region are more likely to indicate intent to visit Maine again than are overnight visitors to the State as a whole.

## Future Travel Likelihood



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

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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.



# Day Visitors: *Traveler Description*



# Day Visitor Demographics

- Day visitors to the Maine Lakes & Mountains region average 47 years of age and earn about \$86,000 annually. Two in three have a college degree, and half are employed full-time. Fifty-seven percent are married.

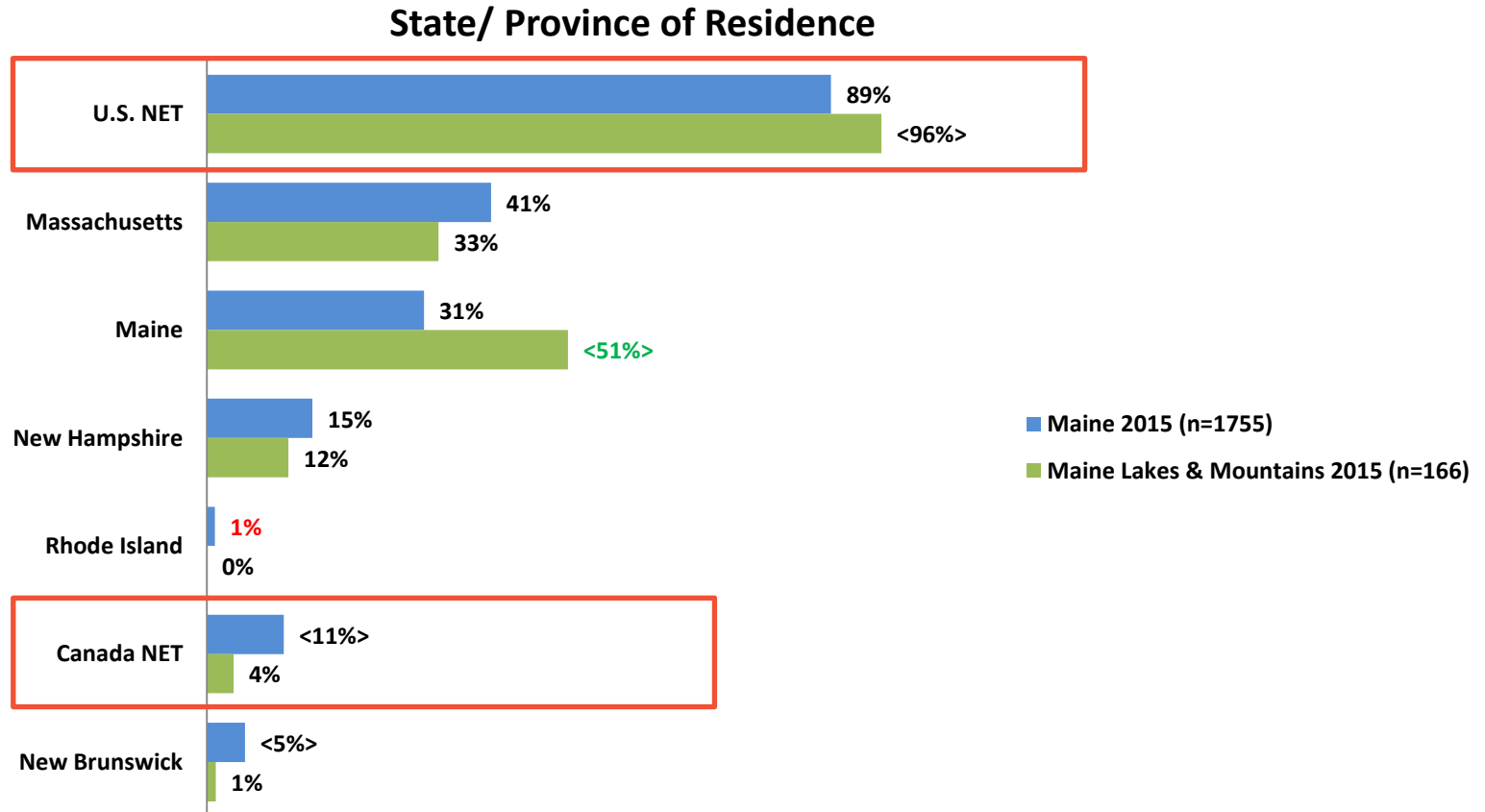
Day Visitors	Maine 2015 (n=1755)	Maine Lakes & Mountains 2015 (n=166)
Age:		
< 35	25%	23%
35 - 44	16%	17%
45 - 54	21%	26%
55 +	38%	33%
Mean Age (Years)	48.0	47.1
Income:		
< \$50,000	22%	25%
\$50,000 - \$99,999	43%	43%
\$100,000 +	35%	32%
Mean Income (Thousands)	\$93,020	\$85,850
Female	62%	63%
College Degree or Higher	68%	67%
Married	60%	57%
Employed Full Time	55%	54%

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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.

# Maine contributes half of the day visitors to the Lakes & Mountains region, a significantly greater proportion than for the State as a whole.

- The Lakes & Mountains region attracts a higher proportion of domestic visitors compared to the State of Maine overall.



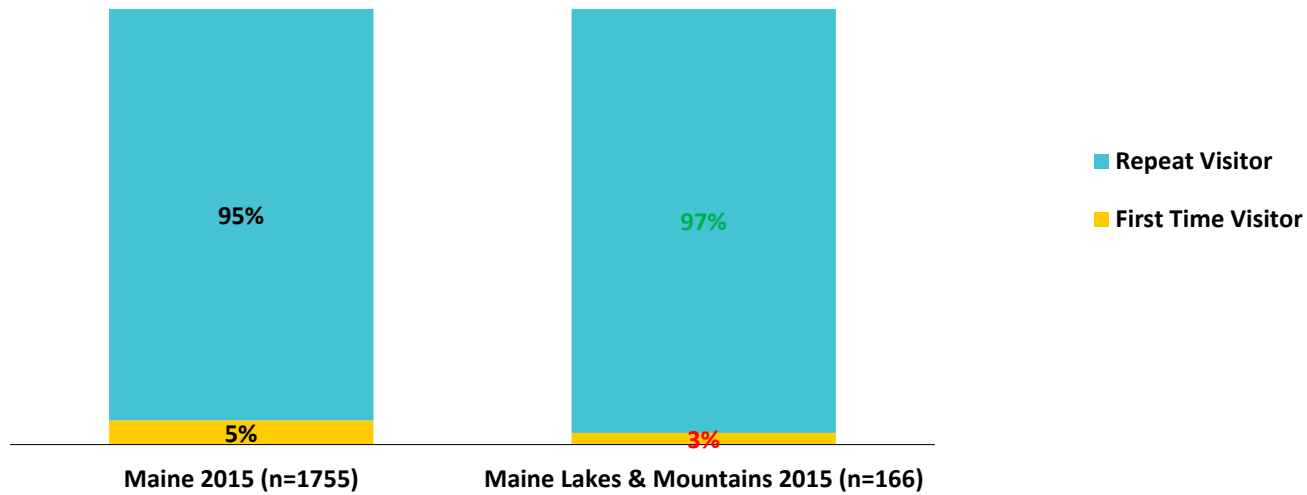
Q2. In what State or Province do you reside?

<> 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.

# Almost all visitors to the Lakes & Mountains region are repeat visitors to Maine (97%).

## Repeat vs. First Time Visitors



Q10. Was this your first trip to Maine?

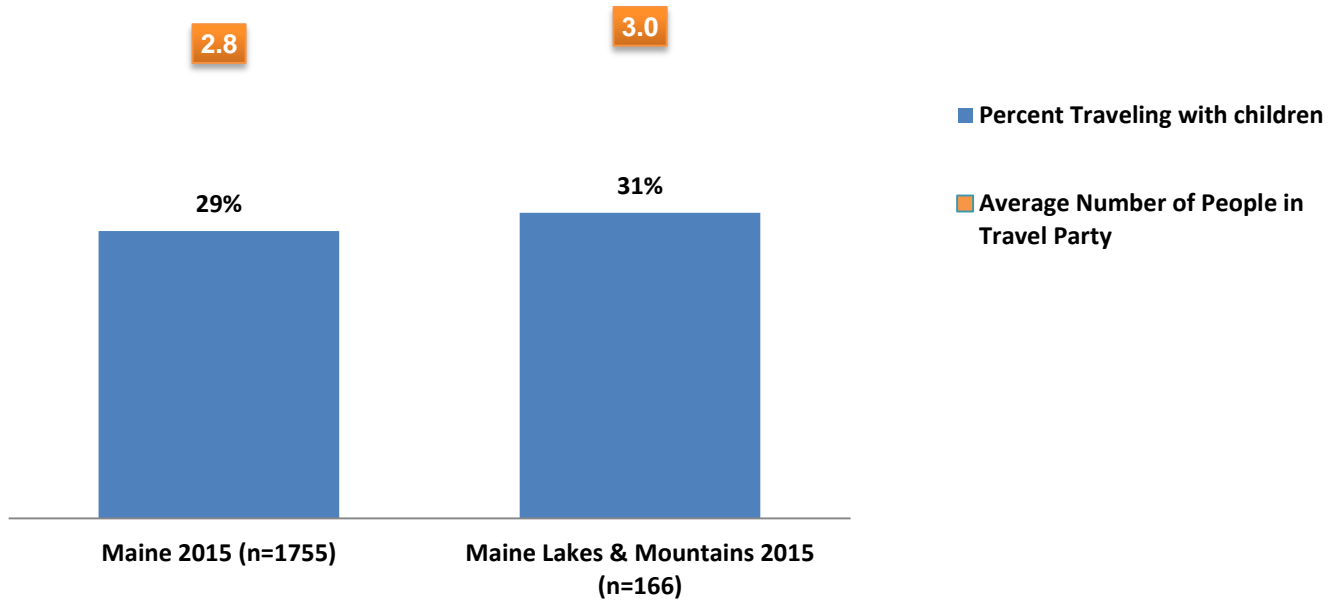
Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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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.

# 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

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

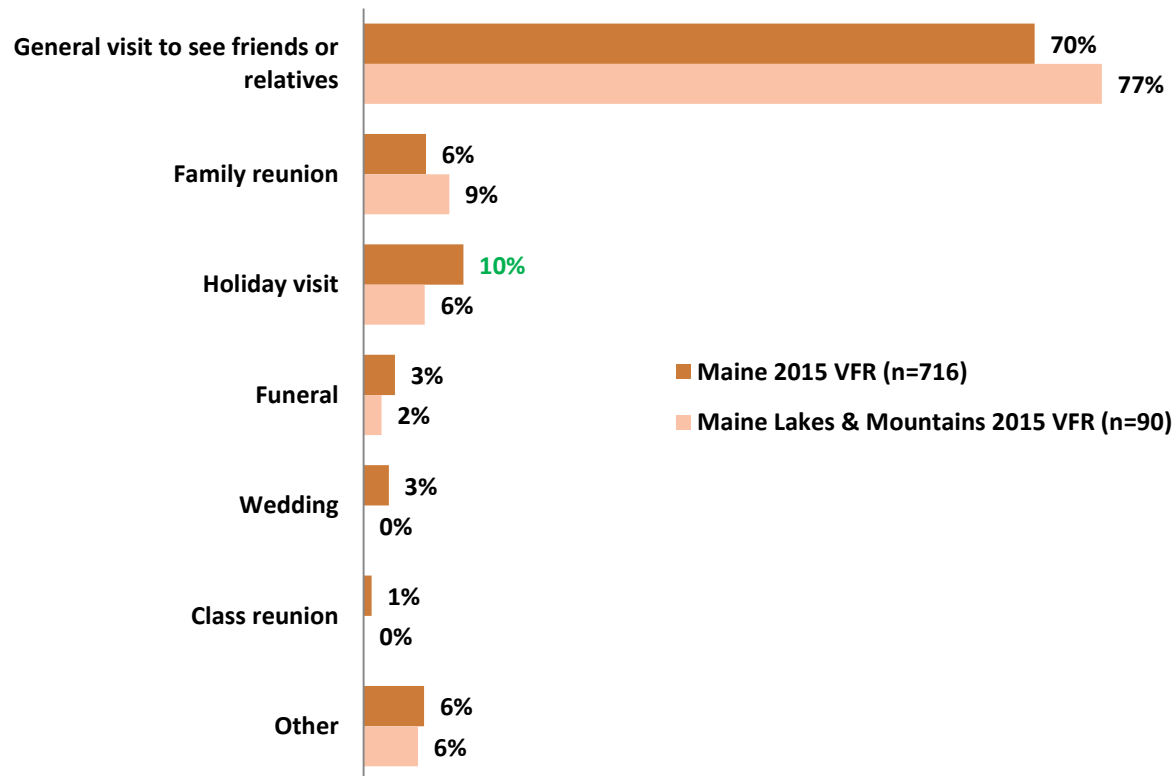
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Day Visitors: *Trip Experience*



# Three in four 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



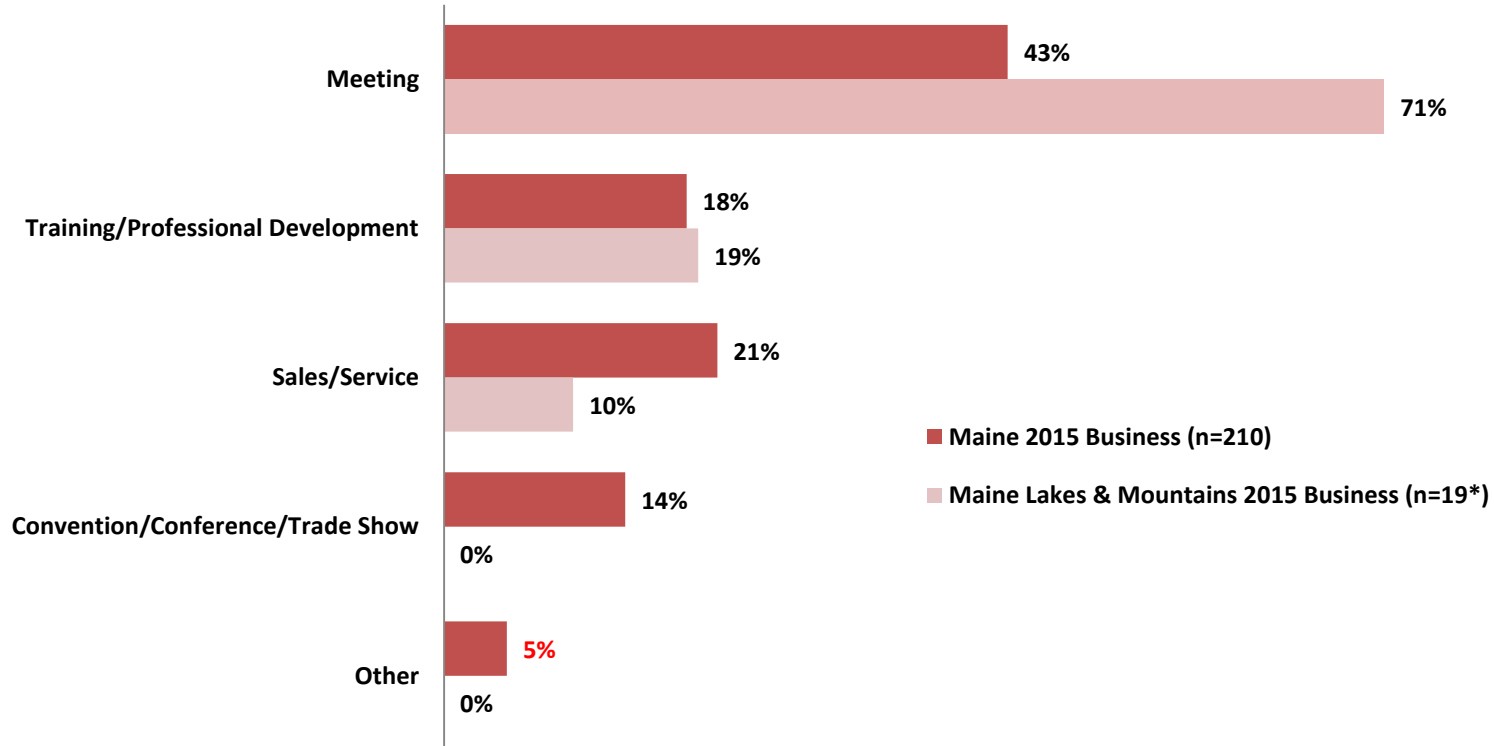
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

<> 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.

# Nearly three-fourths 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.

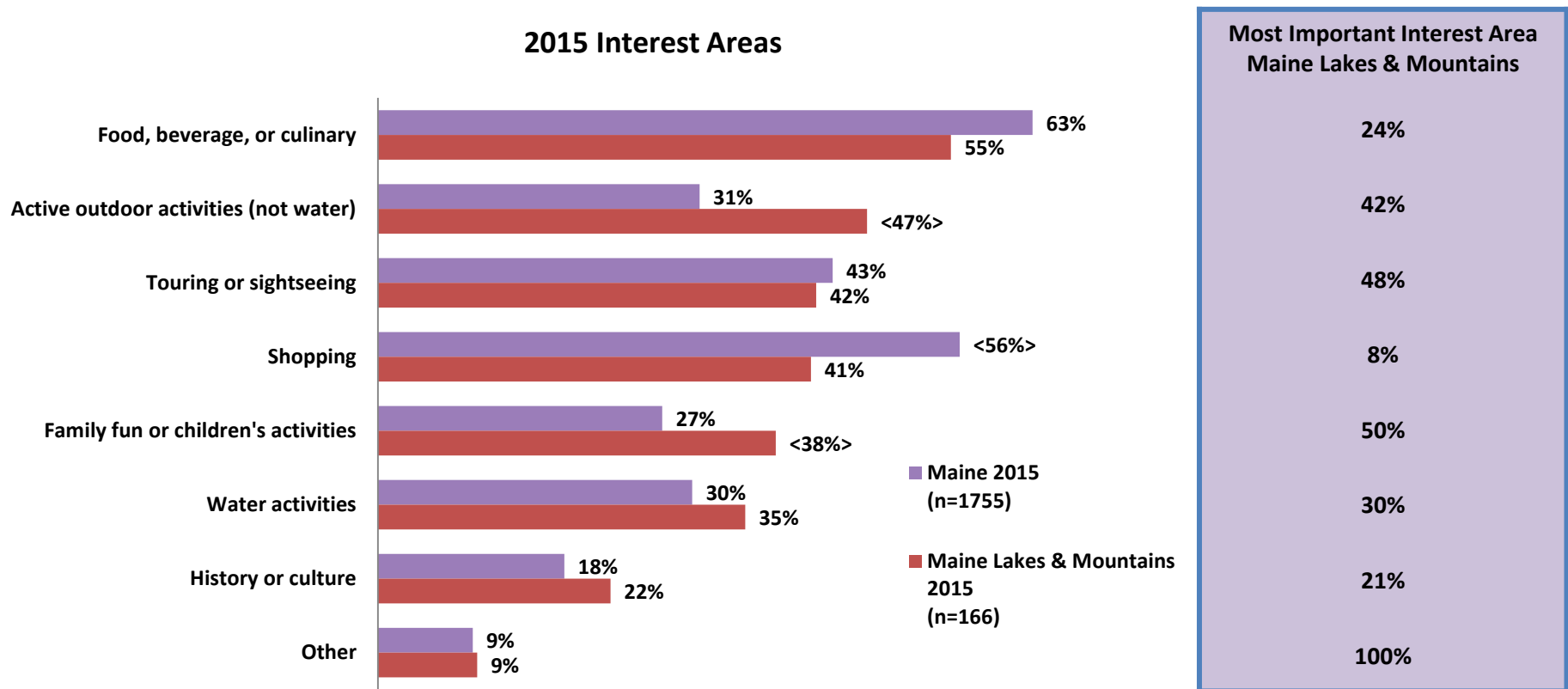
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

\*Please note very small sample size.



# Day visitors to the region are most likely to want to pursue *food/beverage/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 *family fun/children's activities*, and less likely to be interested in *shopping*.



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

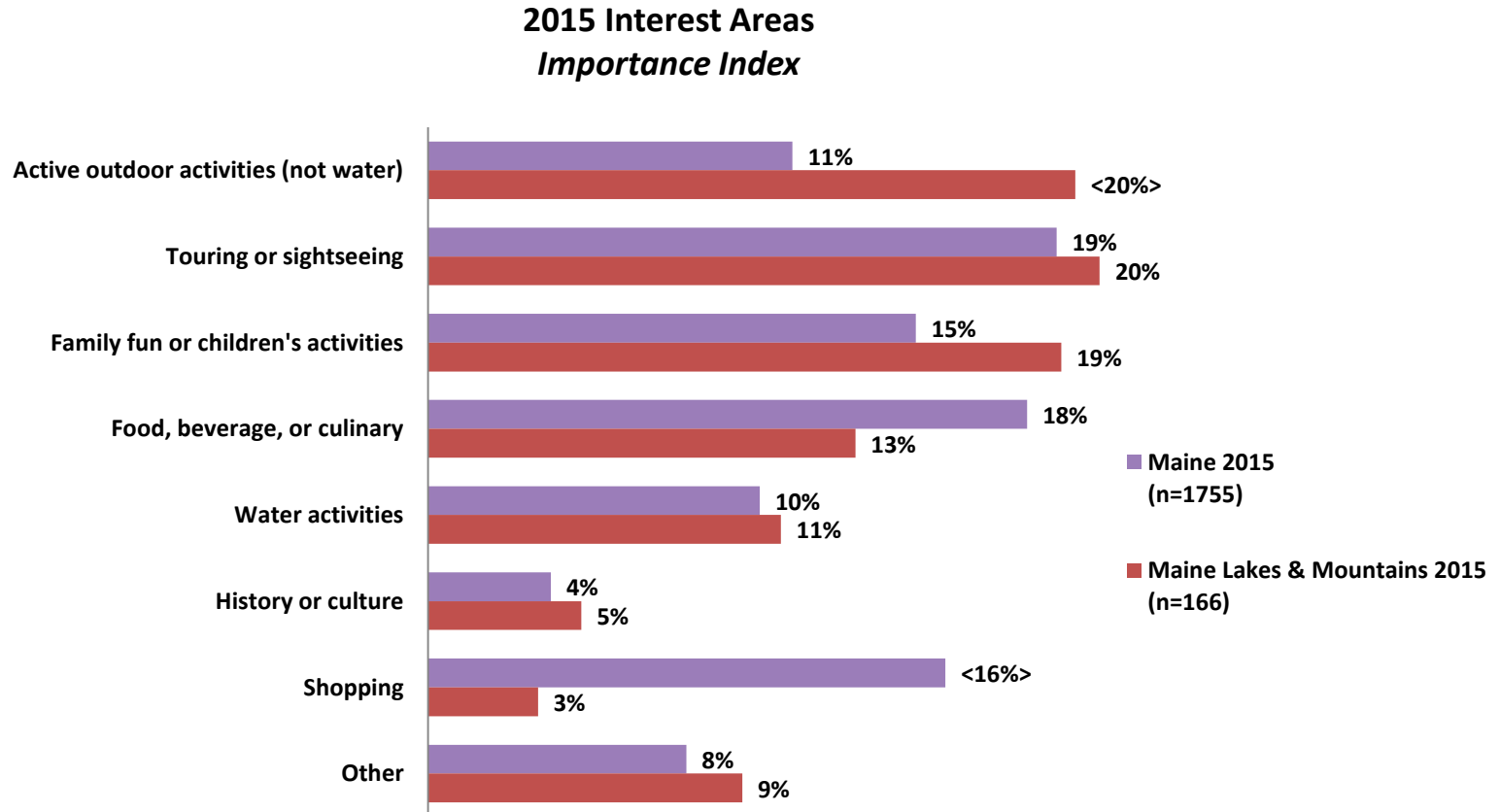
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

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

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

- Day visitors to the Lakes & Mountains region place more importance on *active outdoor activities* and less importance on *shopping* than do day visitors to the State of Maine overall.



**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.

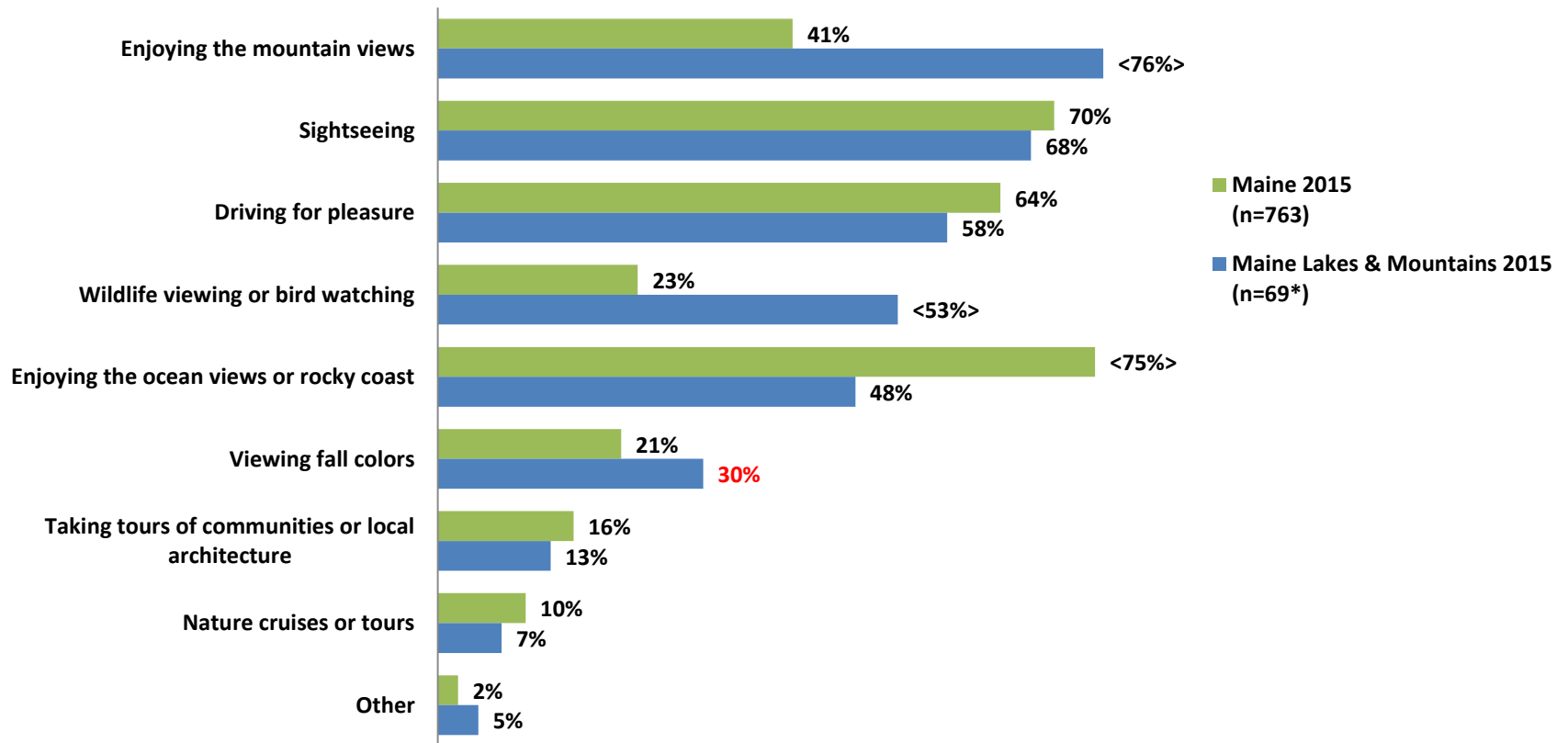
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

# Enjoying the mountain views and sightseeing and are the most common touring/sightseeing activities among day visitors to this region.

- Day visitors to the region are more likely than Maine visitors overall to *enjoy mountain views* and go *wildlife viewing or bird watching*. They are less likely to *enjoy the ocean views or rocky coast*.

## 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.*

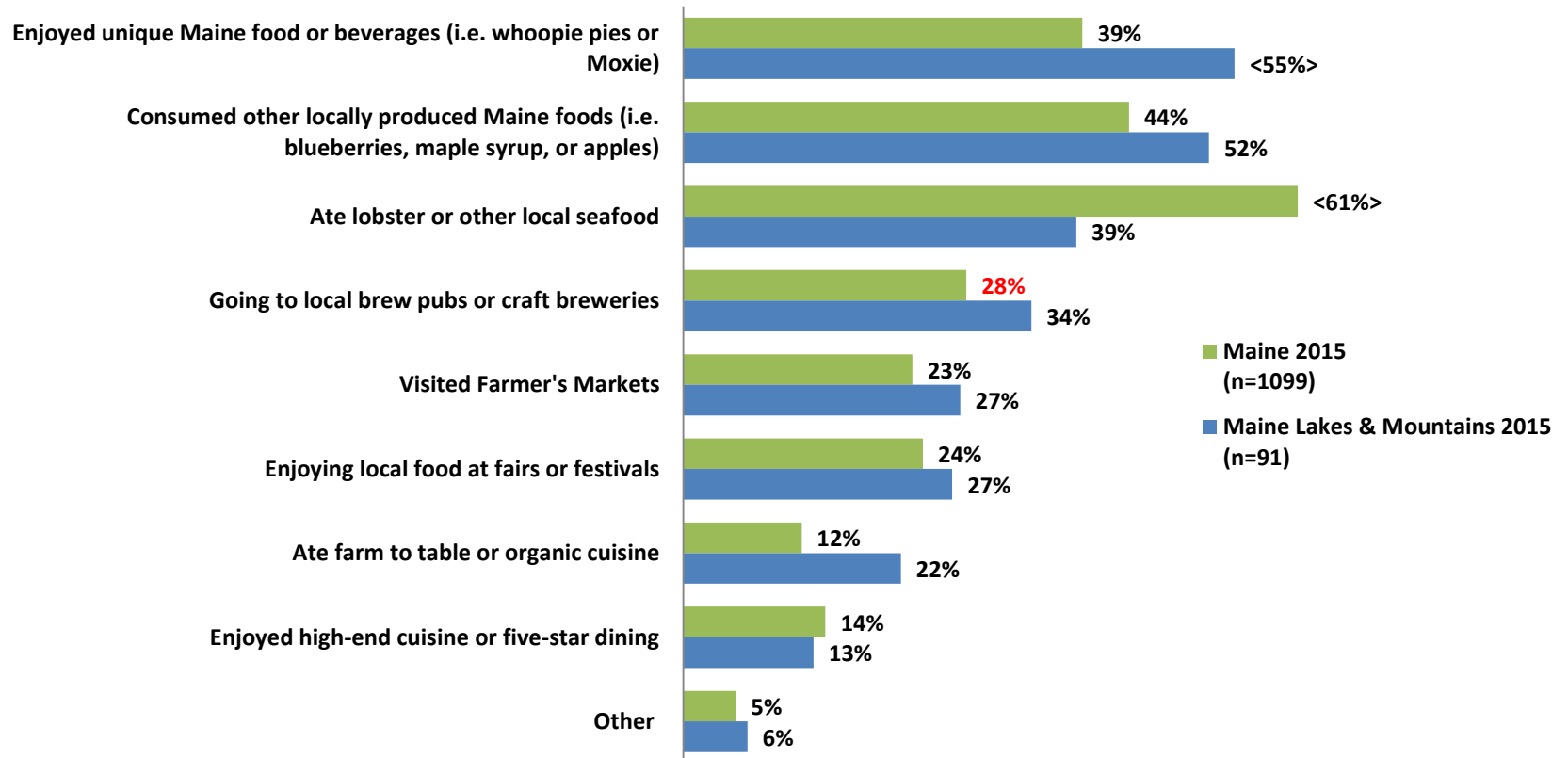
<> indicates a significant difference between subgroups at the 95% confidence level.

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

# Over half of all day visitors interested in food/beverage/culinary activities *enjoy unique Maine food or beverages 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



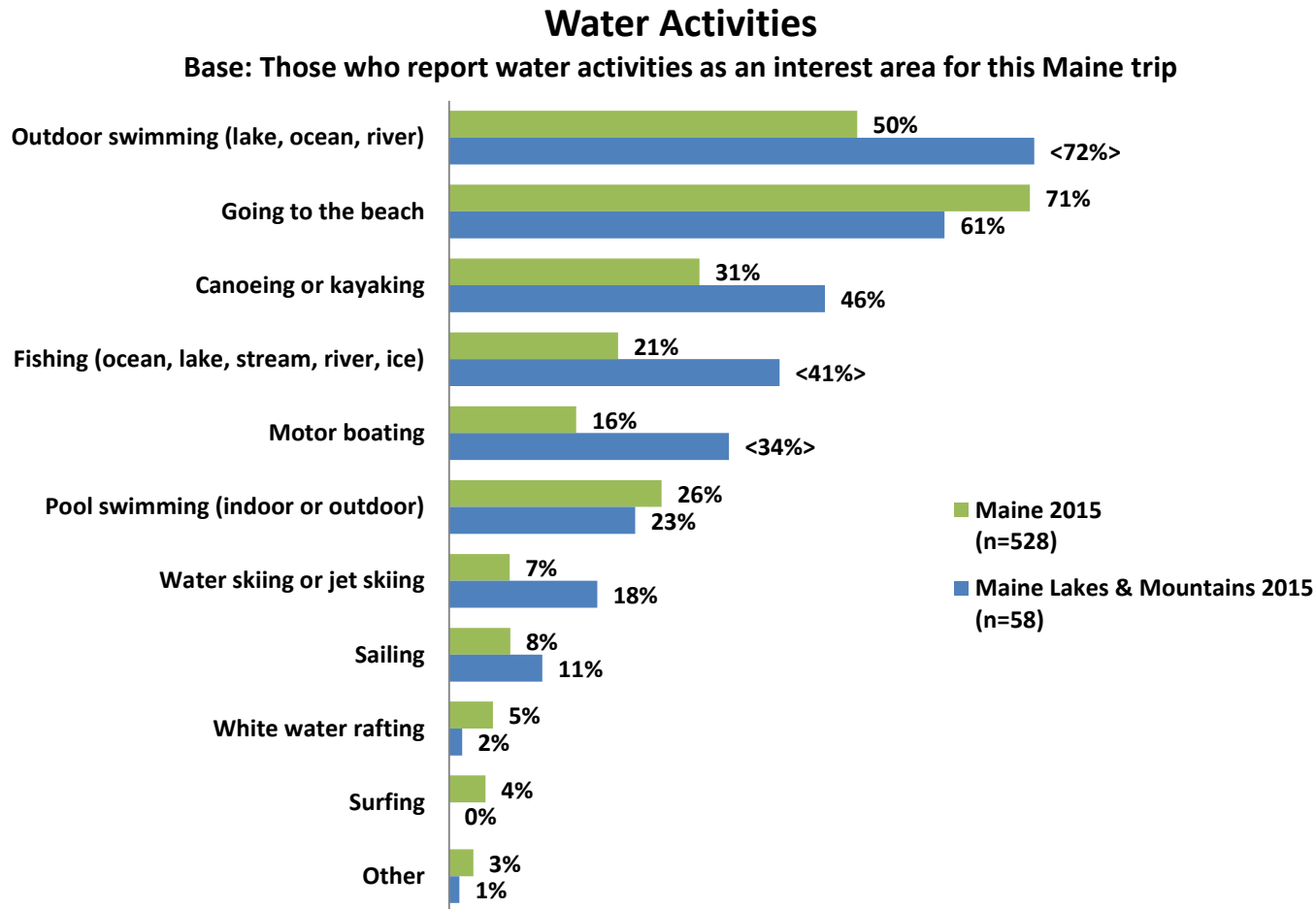
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

# Three in four day visitors to this region who are interested in water activities did some *outdoor swimming* while visiting.

- Outdoor swimming, fishing, 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.*

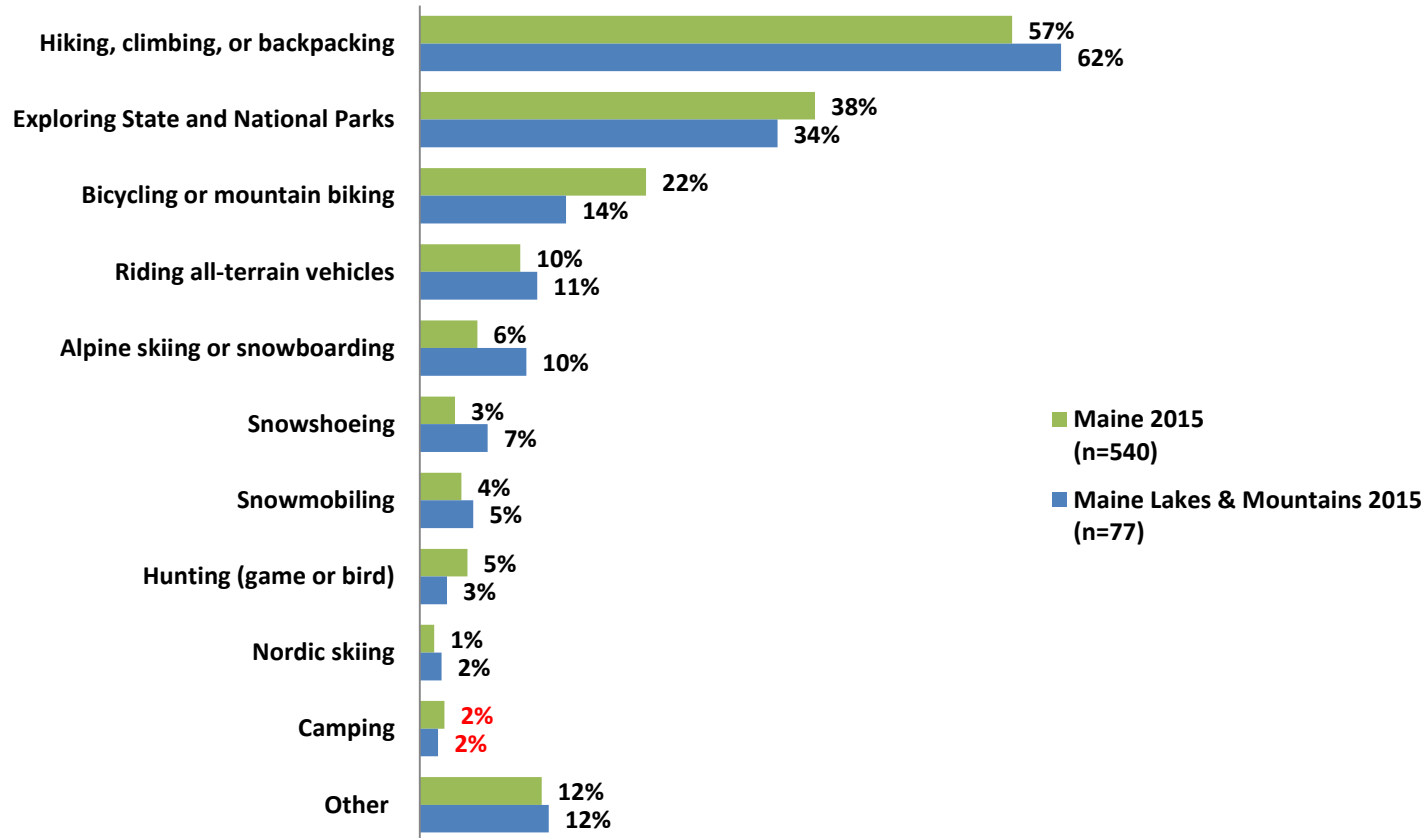
<> indicates a significant difference between subgroups at the 95% confidence level.

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

# 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.*

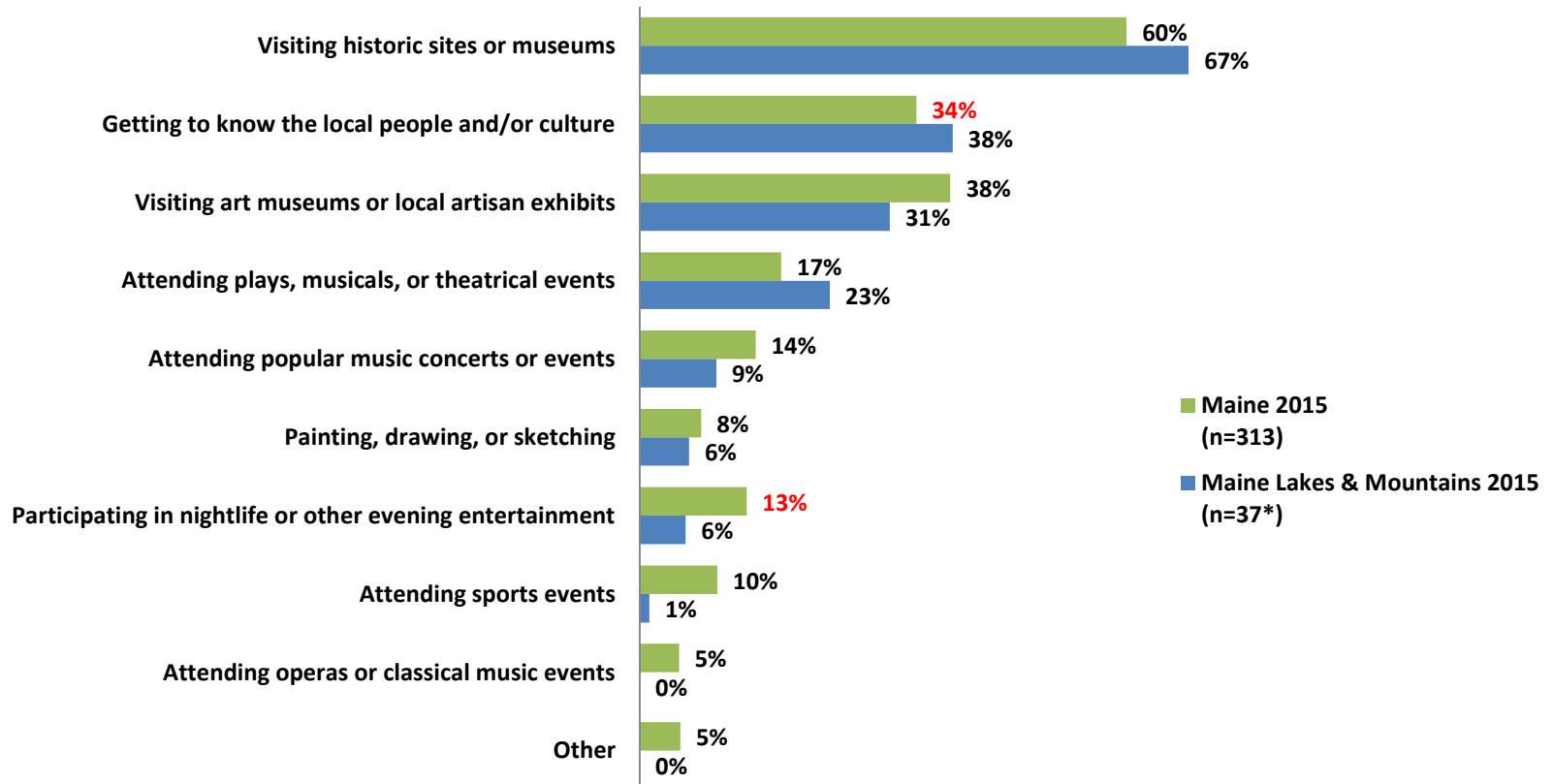
<> indicates a significant difference between subgroups at the 95% confidence level.

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 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.

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.

# Over half of day visitors interested in shopping activities go *outlet shopping* and *shopping at malls or downtown* while visiting 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.

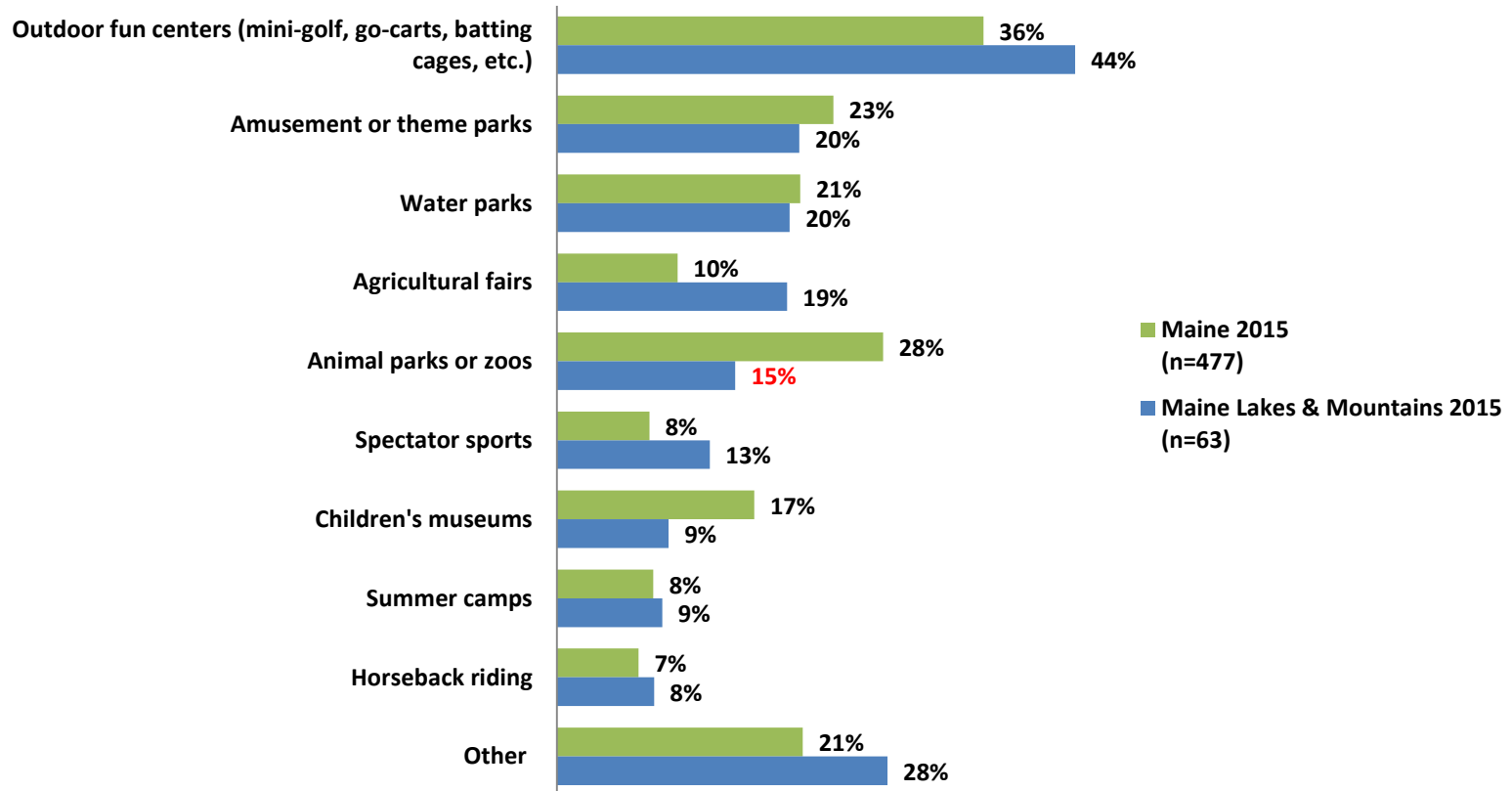
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# Outdoor fun centers are visited by two in five 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



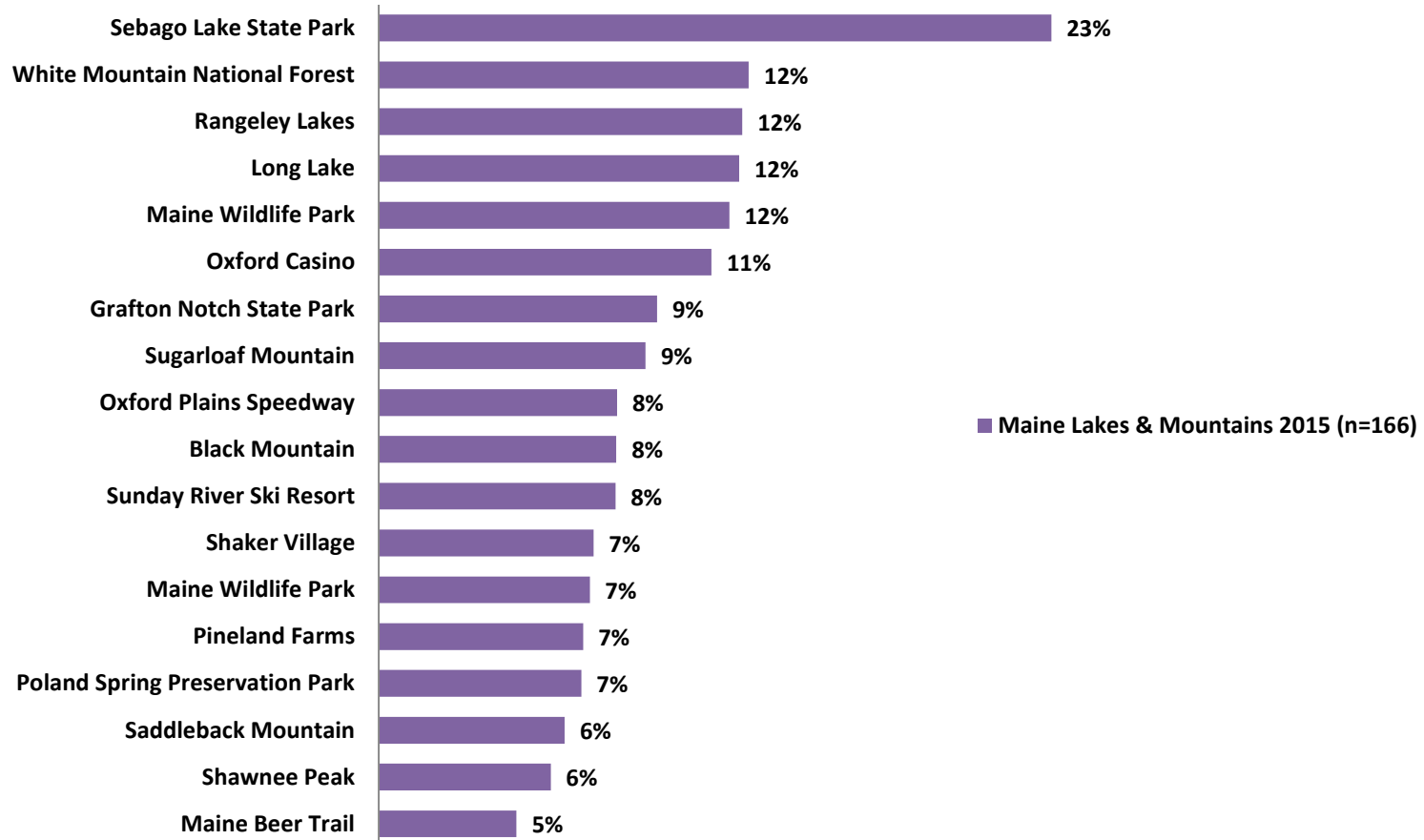
Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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

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

# One in four day visitors to the Lakes & Mountains region visits Sebago Lake State Park.

## Top Attractions/Locations Visited\*



\* 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.

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



# 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 higher proportion of day visitors to the region from **the United States (specifically Maine)**.
- A lower proportion of day visitors to the region from **Canada**.

## Visitor Demographics

- Overnight visitors to the region are **younger**.
- Overnight visitors are **less** likely to have a college degree or higher.

# Comparisons: Region vs. State

- Highlights Continued:

## Trip Interest Areas

### Overnight and Day Visitors

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

### Overnight Visitors

- More likely to want to pursue **water activities**.
- Less likely to want to pursue **food, beverage or culinary**.

### Day Visitors

- Less likely to want to go **shopping**.

# 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**

### Overnight Visitors

- More likely to place importance on **family fun/children's activities**
- Less likely to place importance on **food/beverage/culinary activities**

### Day Visitors

- Less likely to place importance on **shopping**

# Comparisons: Region vs. State

- Highlights Continued:

## Trip Activities – Overnight Visitors

- **More likely to be:**
  - Enjoying the mountain views
  - Wildlife viewing or bird watching
  - Nature cruises or tours
  - Enjoying local food at fairs or festivals
  - Fishing (ocean, lake, stream, river, ice)
  - Canoeing/kayaking
  - Camping
  - Alpine skiing/snowboarding
- **Less likely to be:**
  - Enjoying the ocean views/rocky coast
  - Eating lobster or other local seafood
  - Going to the beach
  - Outlet shopping

# Comparisons: Region vs. State

- Highlights Continued:

## Trip Activities – Day Visitors

- **More** likely to be:
  - Enjoying the mountain views
  - Wildlife viewing/bird watching
  - Enjoying unique Maine food or beverages (i.e., whoopie pies or Moxie)
  - Outdoor swimming
  - Fishing (ocean, lake, stream, river, ice)
  - Motor boating
- **Less** likely to be:
  - Enjoying the ocean views/rocky coast
  - Eating lobster or other local seafood





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