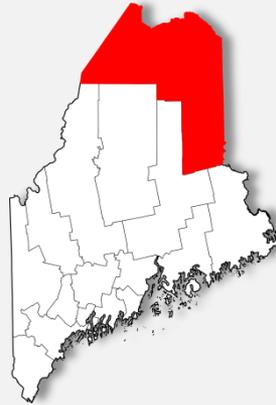




Maine Office of Tourism
Visitor Tracking Research
2017 Calendar Year Annual Report
Regional Insights:
Aroostook County



Prepared by



May 2018

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Research Objectives and Methodology

Research Objectives and Methodology

Three distinct online surveys are used to accomplish the five primary goals of Maine’s visitor tracking research.

Research Objectives	Survey Instruments		
	National Travel Survey	Overnight Visitor	Day Visitor
Identify Maine’s share of the U.S. travel market	✓		
Estimate the number of visitors who come to Maine	✓	✓	✓
Provide a profile of Maine visitors		✓	✓
Estimate the amount of spending generated by tourism in Maine		✓	✓
Determine the Maine traveler’s level of satisfaction and view of Maine		✓	✓

Description of Survey Instruments

National Travel Survey

- Nationally representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor Survey

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor Survey

- Sampled from Maine and a 100-mile radius of Maine’s borders
- Have taken a day trip greater than 50 miles from home in the last four weeks
- Surveyed monthly

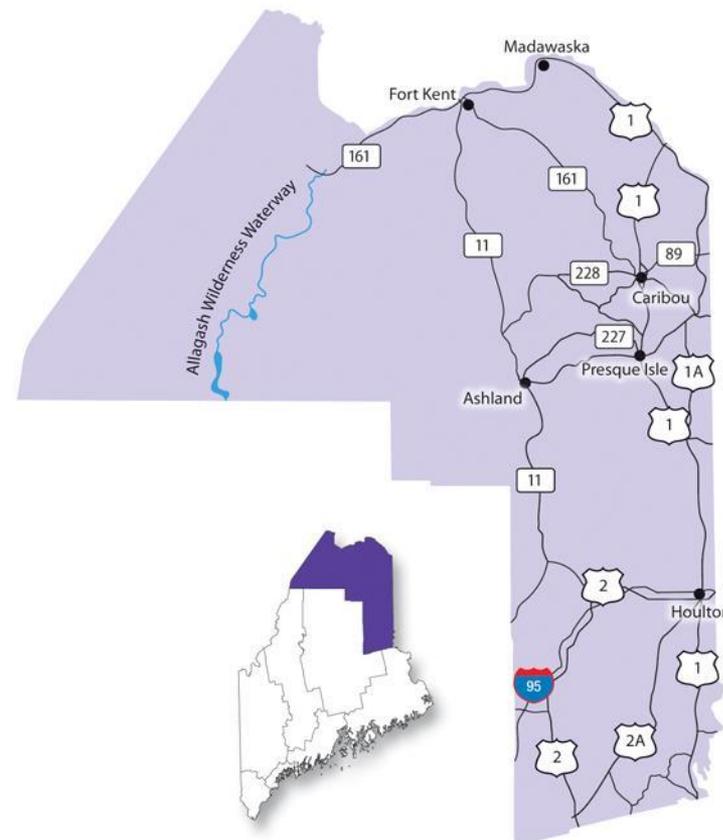
Research Objectives and Methodology

- Survey results were collected during calendar year 2017, for travel to Maine occurring between December 2016 and November 2017. The number of respondents participating in each survey statewide is:

Research Component	2017 Completed Surveys
Overnight Visitor Survey	2,922
Day Visitor Survey	1,782
National Travel Survey	22,070

Research Objectives and Methodology

- The following report provides a profile of visitors and their trips to the **Aroostook County** tourism region during 2017, including:
 - 129 overnight visitors, and
 - 65 day visitors.
- Throughout this report, data for the **Aroostook County** 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 are calculated at the 95% confidence level and are noted throughout by < >. (A statistically significant difference means the observed difference is more than would be expected by chance 95 times out of 100.)
- Statistically significant differences between 2016 and 2017 are also highlighted for both the Aroostook County 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 Aroostook County are 35 years old, on average, and have average annual household incomes just over \$90,000. Two-thirds have at least a college degree and half are married. Seven in ten are employed full-time.
- Overnight visitors to Aroostook County are younger, on average, than visitors to Maine overall.

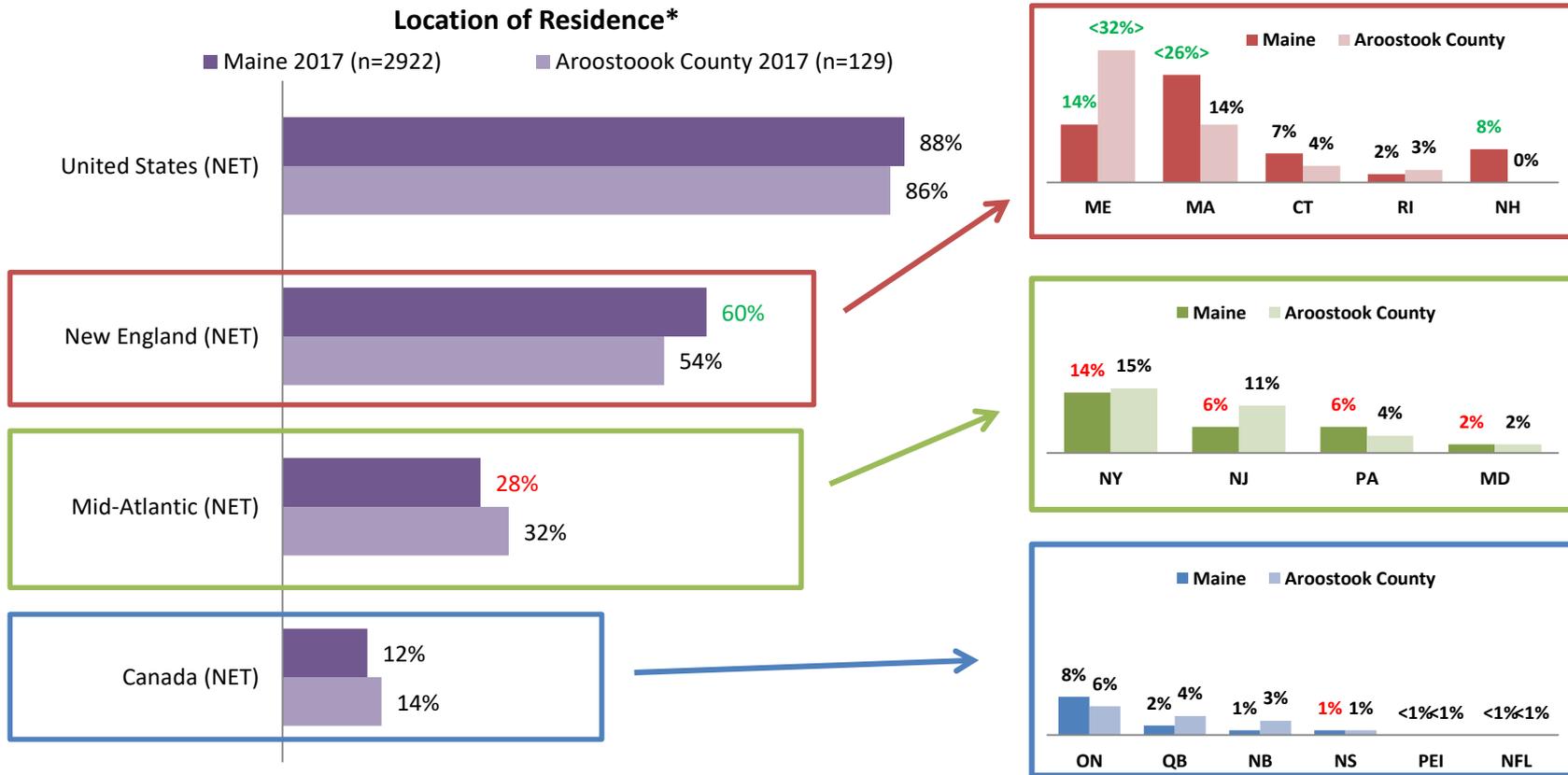
Overnight Visitors	Maine 2017 (n=2922)	Aroostook County 2017 (n=129)
Age:		
< 35	39%	<59%>
35 - 44	23%	22%
45 - 54	16%	14%
55 +	<22%>	5%
Mean Age (Years)	<40.7>	34.7
Income:		
< \$50,000	23%	23%
\$50,000 - \$99,999	43%	43%
\$100,000 +	34%	34%
Mean Income	\$92,700	\$91,400
Female	<70%>	59%
College Degree or Higher	65%	64%
Married	50%	50%
Employed Full-Time	62%	69%

<> indicates a significant difference between this region and the State 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 nine out of ten overnight visitors to Aroostook County are from the U.S., with most arriving from New England.

- Overnight visitors to Aroostook County are predominately from Maine.
- Further, compared to overnight visitors to the State of Maine overall, those visiting Aroostook County are more likely to be from Maine and less likely to be from Massachusetts.



*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

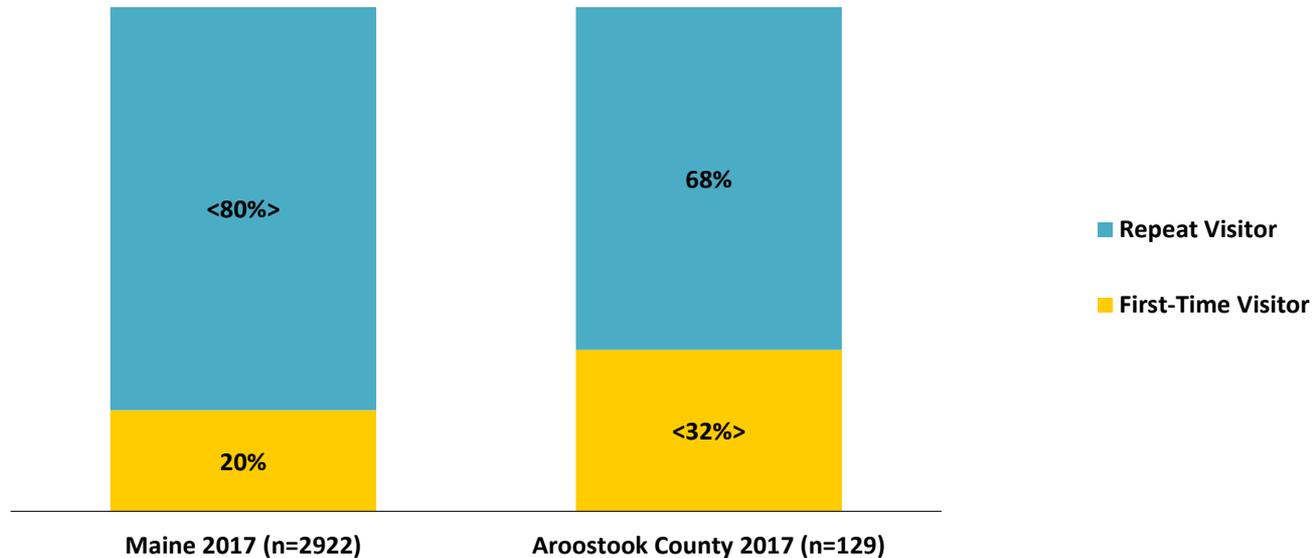
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

One-third of overnight visitors to Aroostook county are visiting for the first time.

- Overnight visitors to Aroostook County are more likely to be visiting for the first time, as compared to visitors to the State as a whole.

Repeat vs. First-Time Visitors



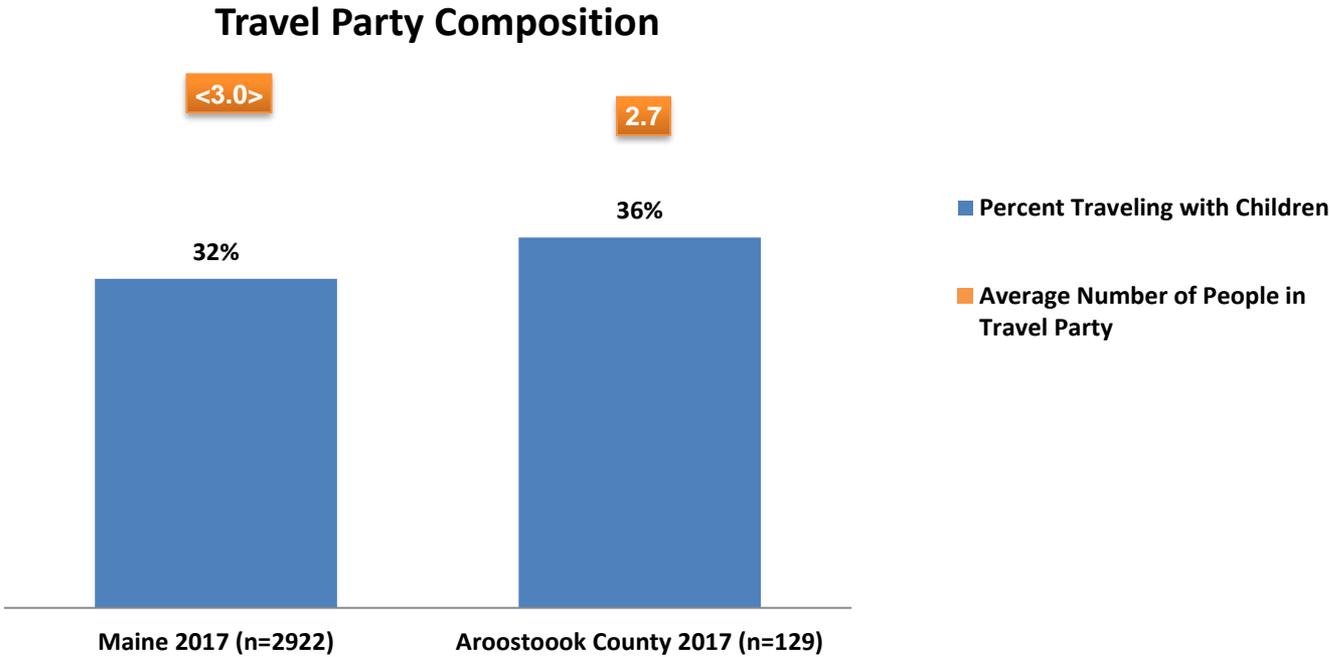
Q11. Was this your first visit in Maine?

<> indicates a significant difference between this region and the State 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-third of overnight visitors to Aroostook County are traveling with children.

- Aroostook County visitors travel in smaller parties than do visitors to the State of Maine overall.



Q24. Including yourself, how many people (adults and children) were in your immediate travel party on this specific trip?

Q25. How many of these people were: Children?

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Overnight Visitors: Trip Experience

Sample Size Exclusions

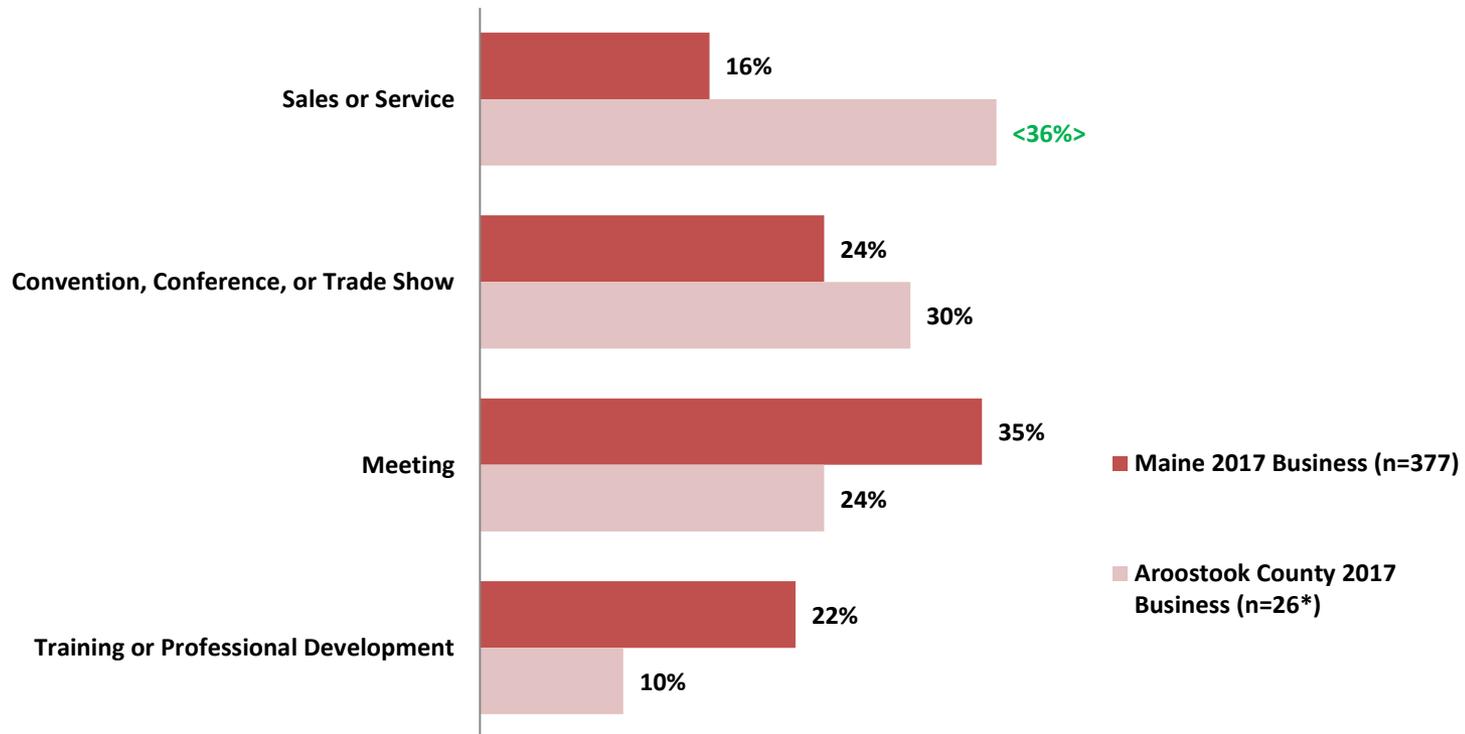
Data for some questions is not presented on the following pages because the sample sizes are too small. The results not shown include:

- Trip Activities: Water Activities (n=16)

Business visitors to Aroostook County are most likely to cite a *sales/service* call as the primary purpose of their overnight business trip.

- One-quarter or more traveled for a *convention/conference/trade show or meeting*.

Primary Purpose of Overnight Business Trips



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

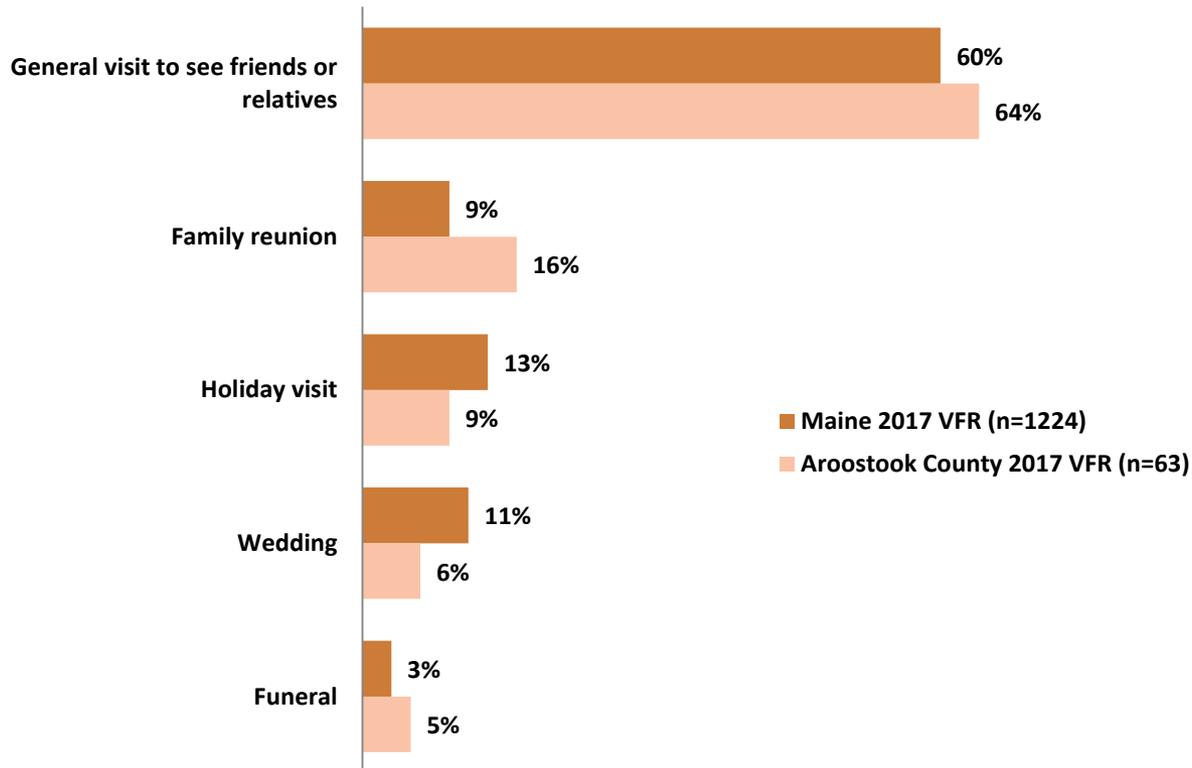
<> indicates a significant difference between this region and the State at the 95% confidence level.

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. Use caution when interpreting results.

The most common reason for an overnight VFR trip to this region, by far, is a *general visit to see friends or relatives*.

Primary Purpose of Overnight VFR* Trips



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

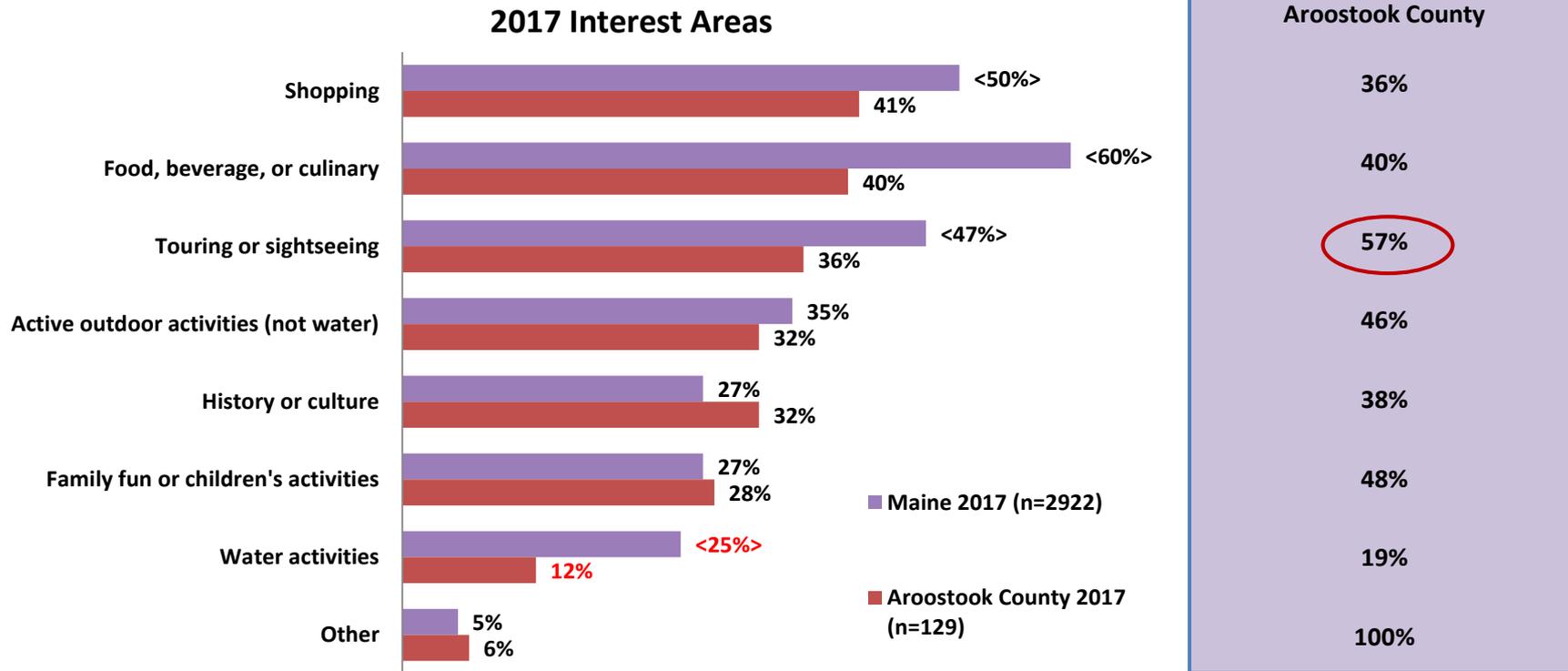
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

*VFR = Visiting Friends and Relatives

The most commonly pursued interest areas by overnight visitors to Aroostook County are *shopping* and *food/beverage/culinary* activities.

- Though they remain top interest areas among Aroostook County visitors, *shopping* and *food/beverage/culinary activities* are less popular among this region's visitors than they are to visitors to the State as a whole. *Touring/sightseeing* and *water activities* are also less popular among visitors to Aroostook County.
- More than half of Aroostook County visitors who are interested in *touring/sightseeing* list this as most important in their decision to visit.



Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q36. 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

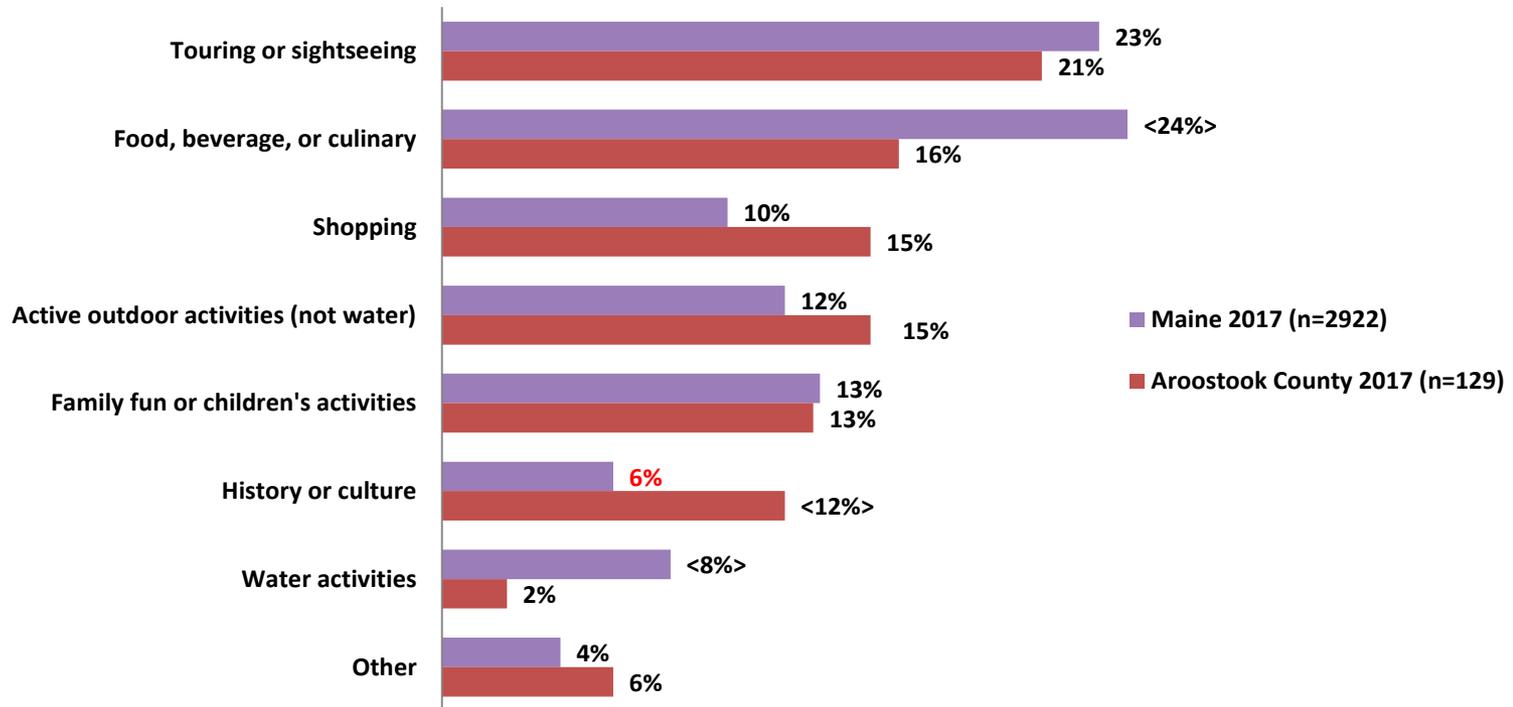
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

When considering both interest and importance in deciding to visit, touring/sightseeing interests rank highest among overnight visitors to Aroostook County.

- Food/beverage/culinary activities and water activities are less important as drivers of visitation to Aroostook County as compared to the rest of the State, while *history or culture* activities are a stronger travel driver for Aroostook County as compared to the rest of the State.

**2017 Interest Areas
Travel Driver Index**

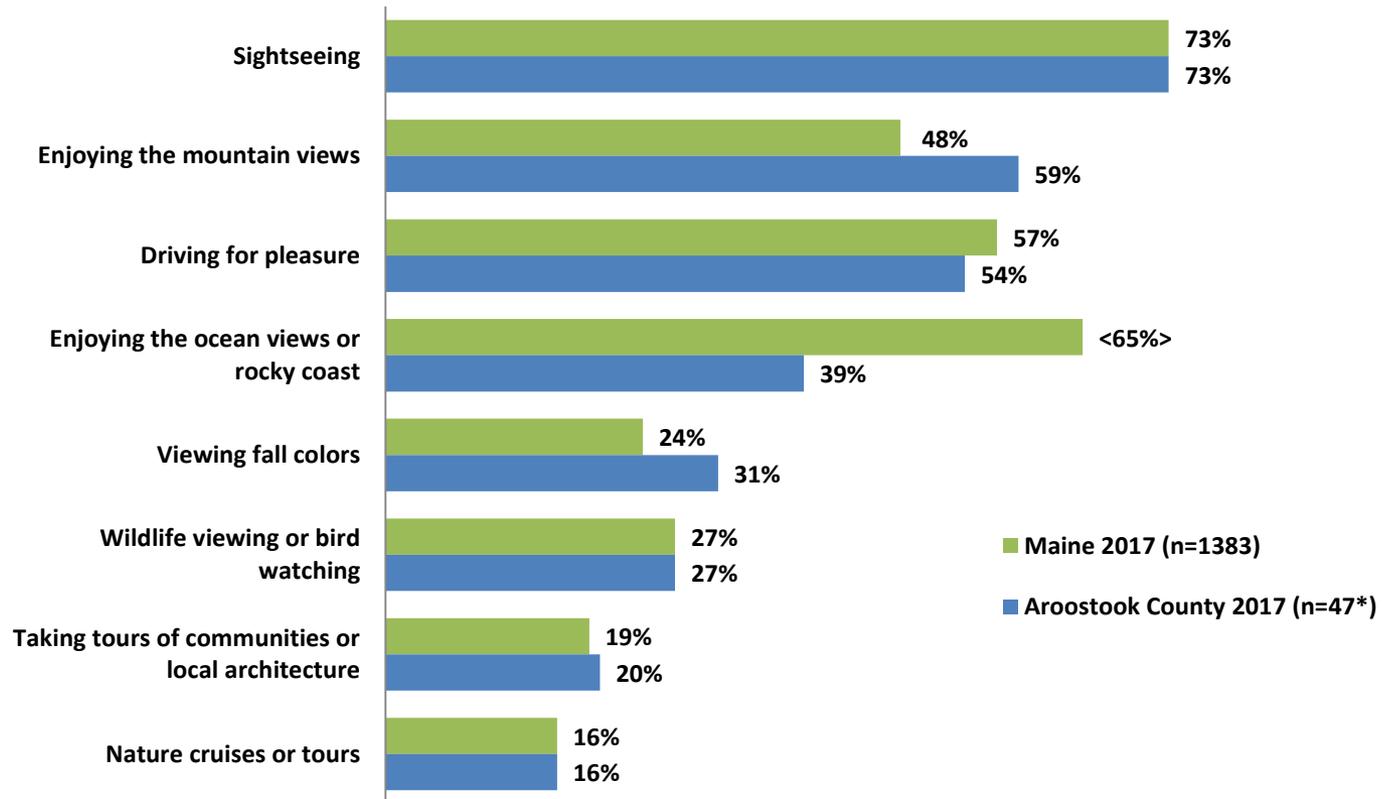


Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Aroostook County visitors interested in touring/sightseeing were most likely to do some *sightseeing* while visiting.

Touring or Sightseeing Activities

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State 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.

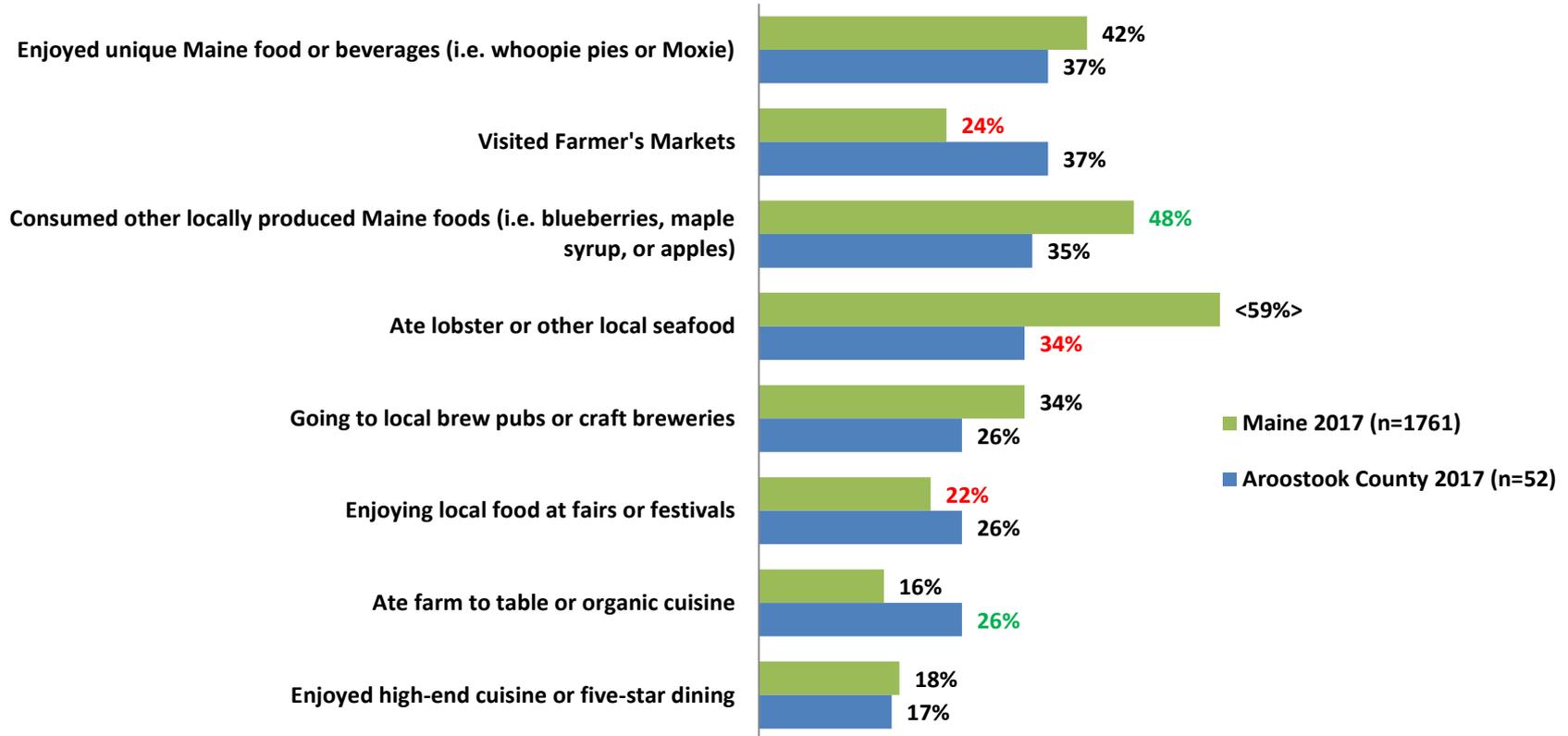
**Please note small sample size. Use caution when interpreting results.*

Aroostook County visitors interested in food/beverage/culinary activities enjoyed a wide variety of these activities.

- Overnight visitors to Aroostook County are less likely than visitors to the State as a whole to *eat lobster or other local seafood* while visiting.

Food, Beverage, or Culinary Activities

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



Q37. In which of the following activities did you participate during this trip? Please check all that apply.

<> indicates a significant difference between this region and the State at the 95% confidence level.

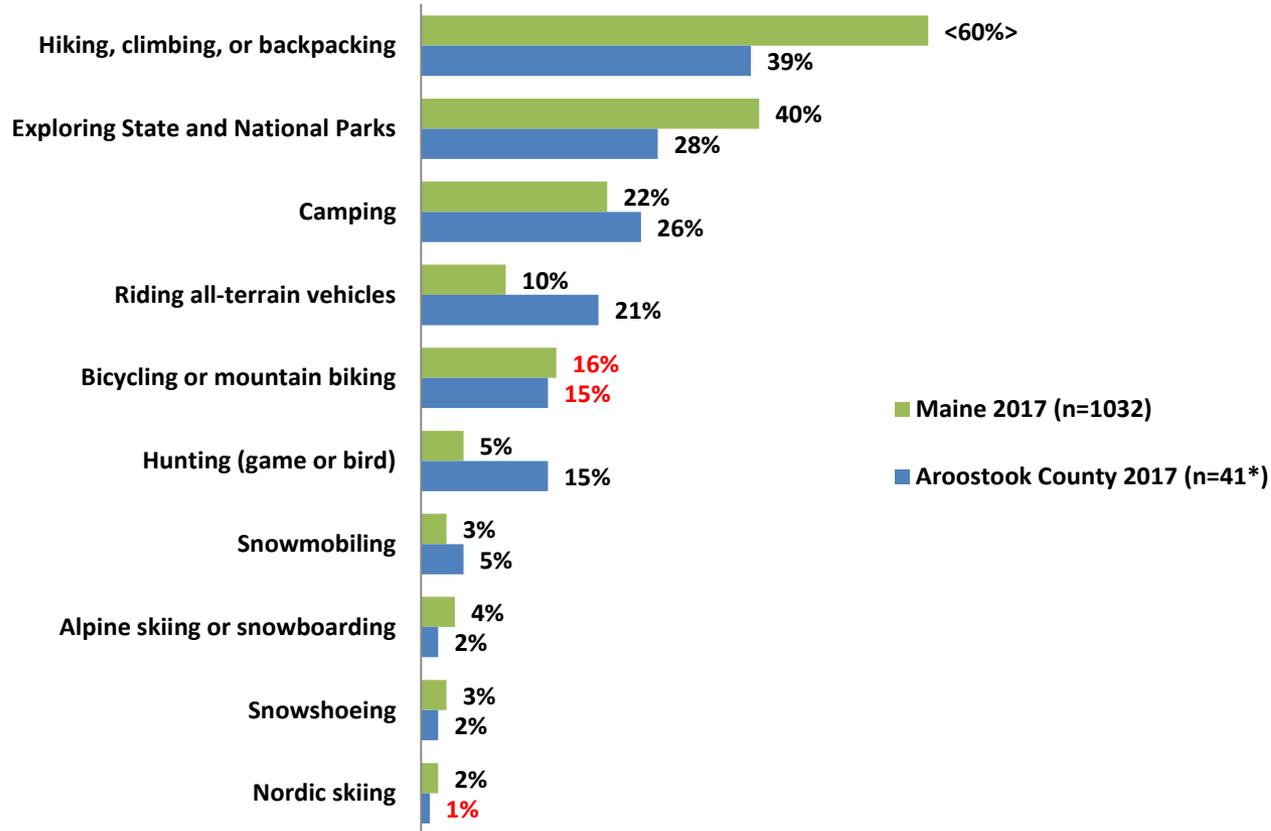
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Hiking/climbing/backpacking is the most common outdoor activity among Aroostook County overnight visitors interested in active outdoor pursuits.

- Though pursued by the highest proportion of Aroostook County visitors interested in active outdoor activities, *hiking/climbing/backpacking* is less popular in this region than it is among visitors to the State overall.

Active Outdoor Activities – Non-Water

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



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State 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.

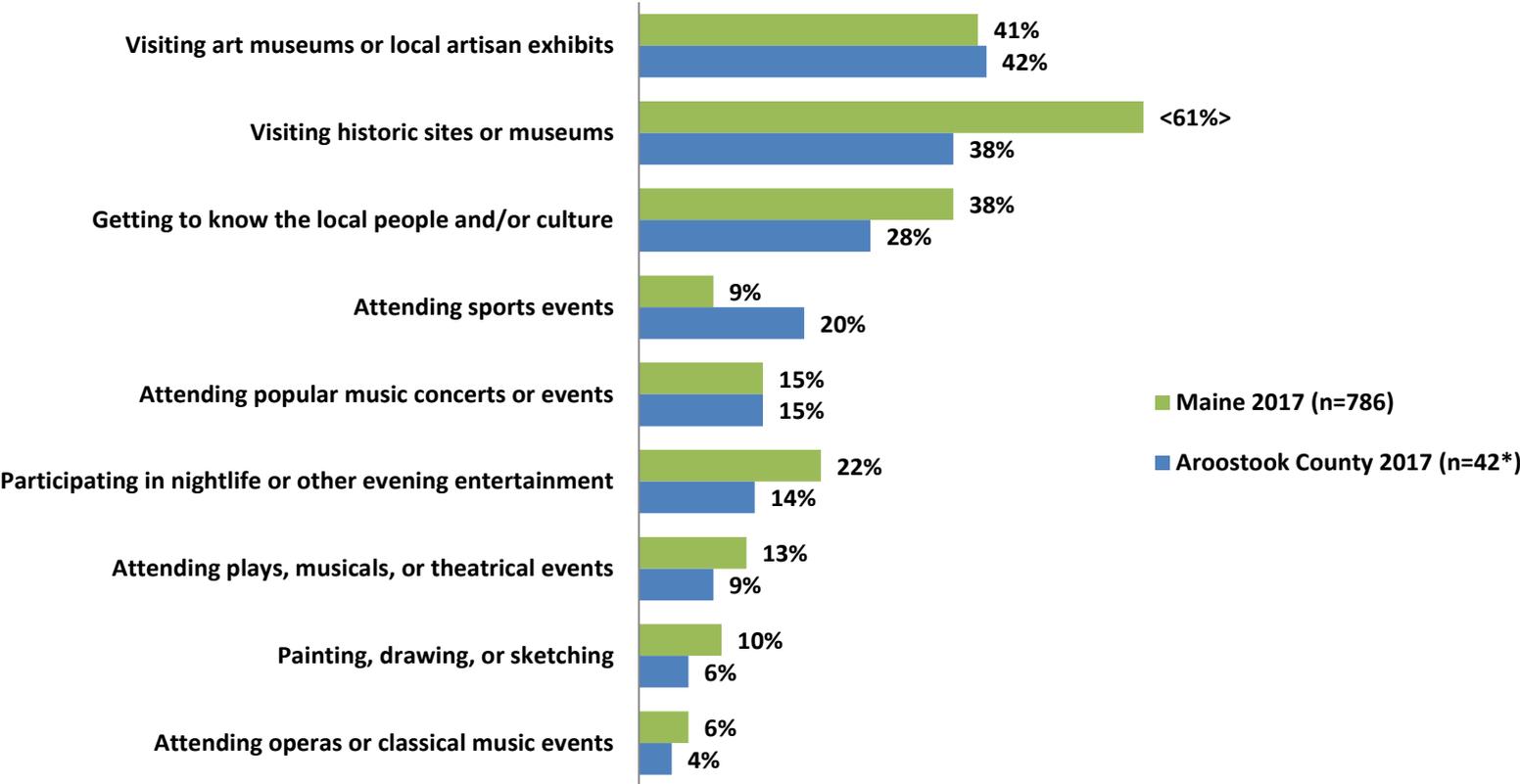
**Please note small sample size. Use caution when interpreting results.*

Visiting art museums/local artisan exhibits and visiting historic sites/museums are the most common history/culture activities pursued among overnight visitors to this region.

- Aroostook County visitors interested in history/culture activities are less likely to visit historic sites or museums as compared to visitors to the State as a whole.

History or Culture Activities

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

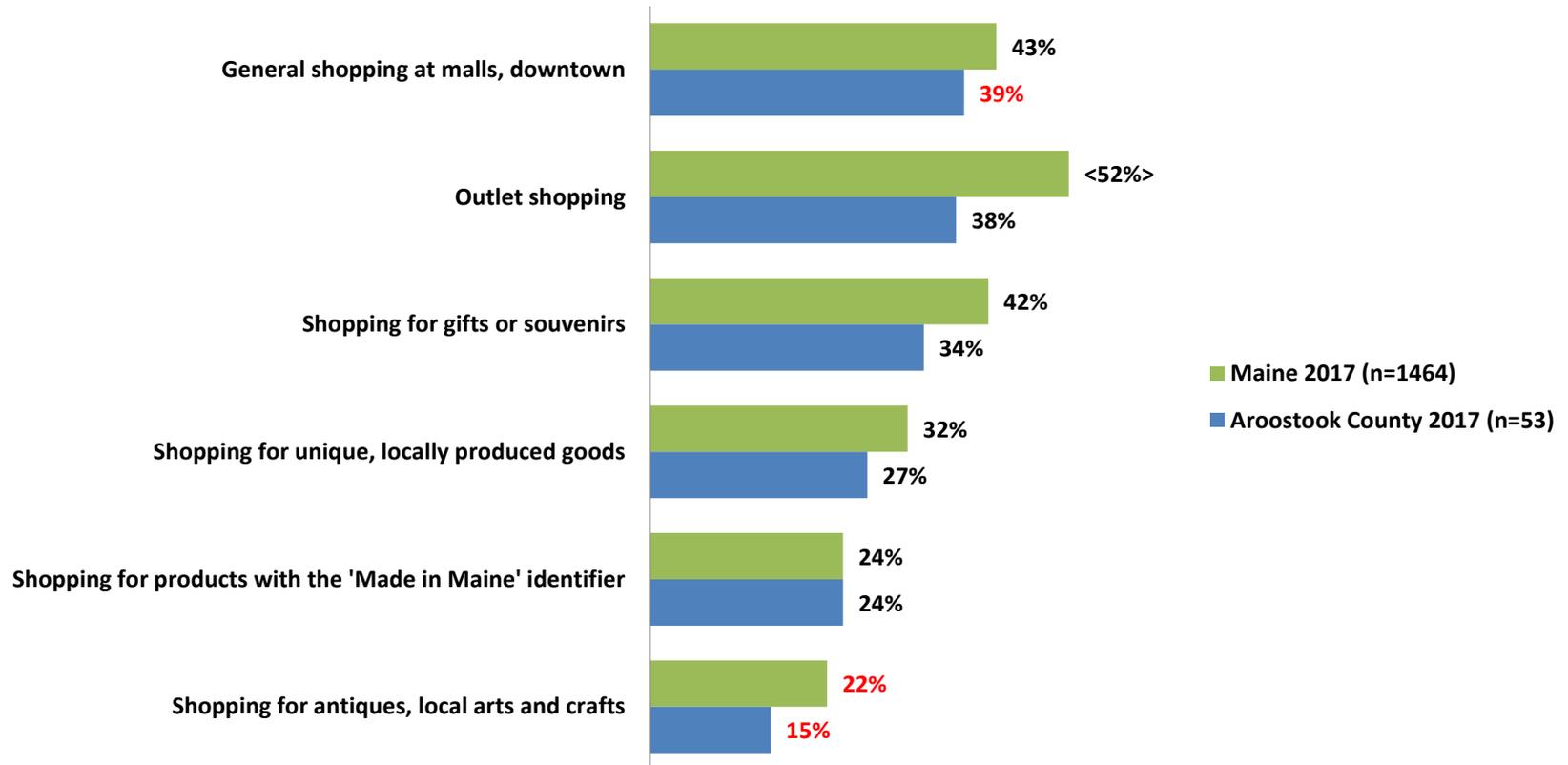


Q37. In which of the following activities did you participate during this trip? Please check all that apply.
 <> indicates a significant difference between this region and the State at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
 *Please note small sample size. Use caution when interpreting results.

Overnight visitors to Aroostook County who are interested in shopping participate in a wide variety of shopping activities.

Shopping Activities

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



Q37. In which of the following activities did you participate during this trip? Please check all that apply.

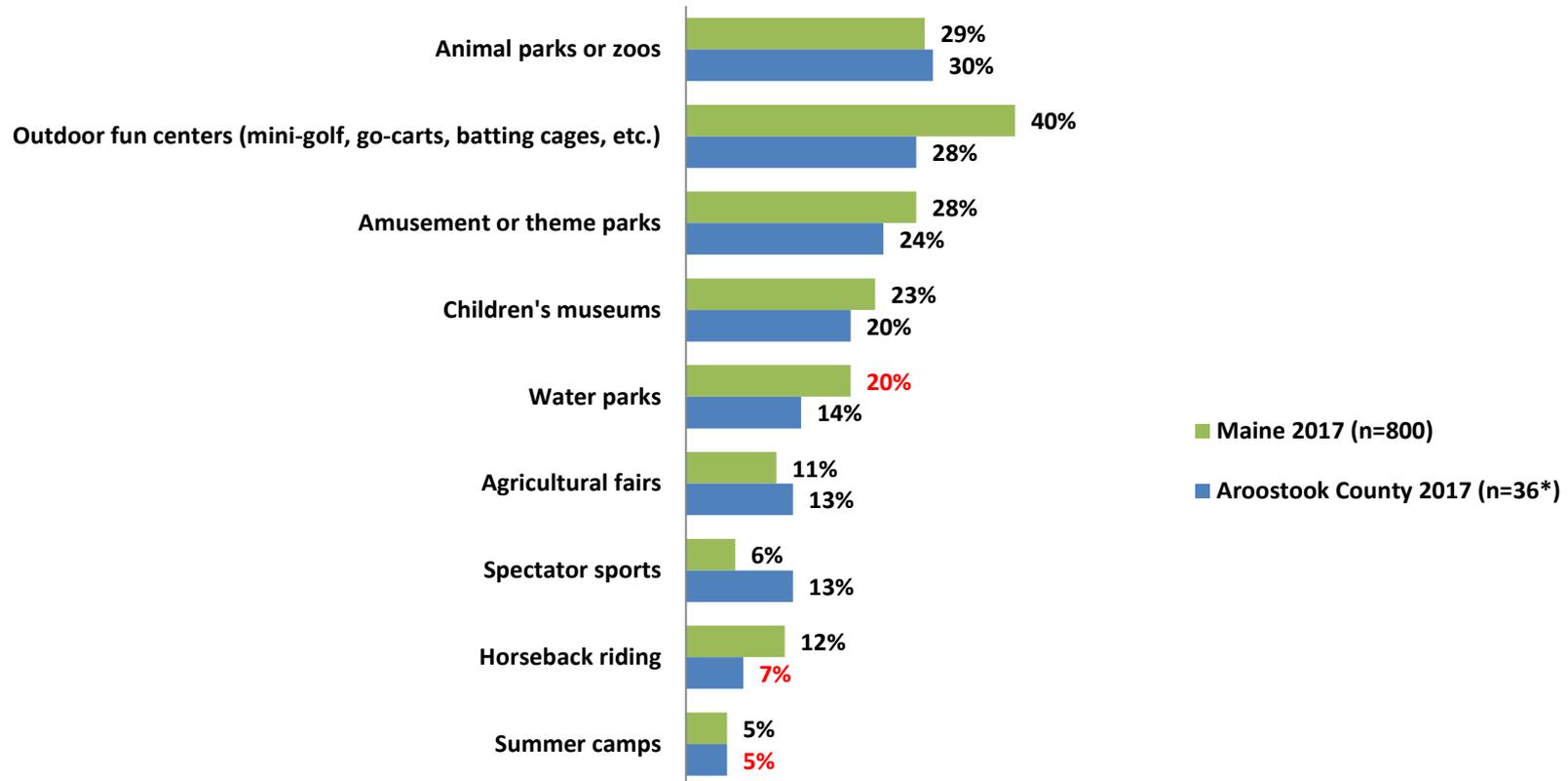
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Visitors to Aroostook County who report interest in family fun/ children's activities also participate in a 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 their Maine trip



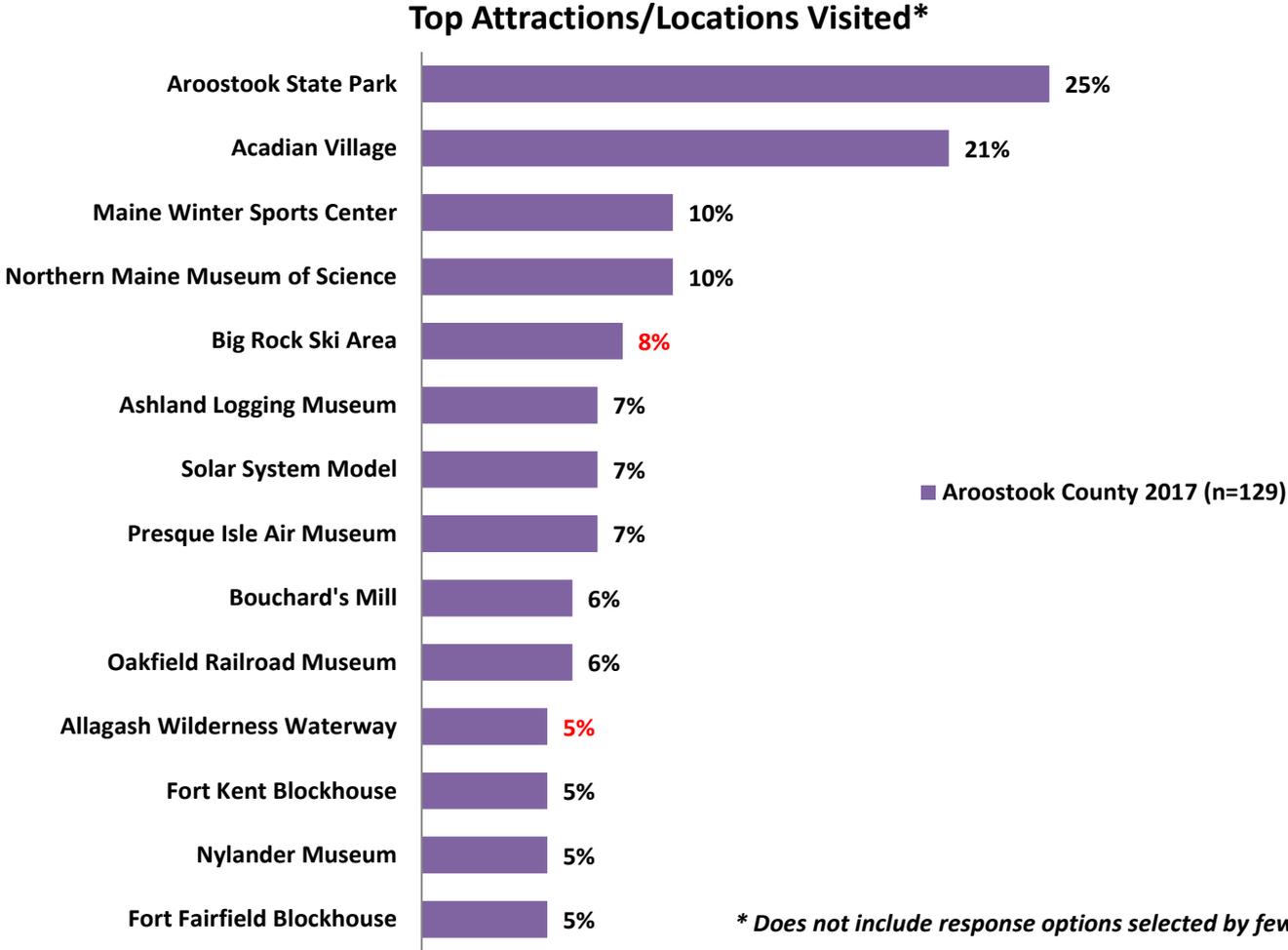
Q37. In which of the following activities did you participate during this trip? Please check all that apply.

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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.

*Please note small sample size. Use caution when interpreting results.

Aroostook State Park and Acadian Village are the most visited attractions by overnight visitors to Aroostook County.

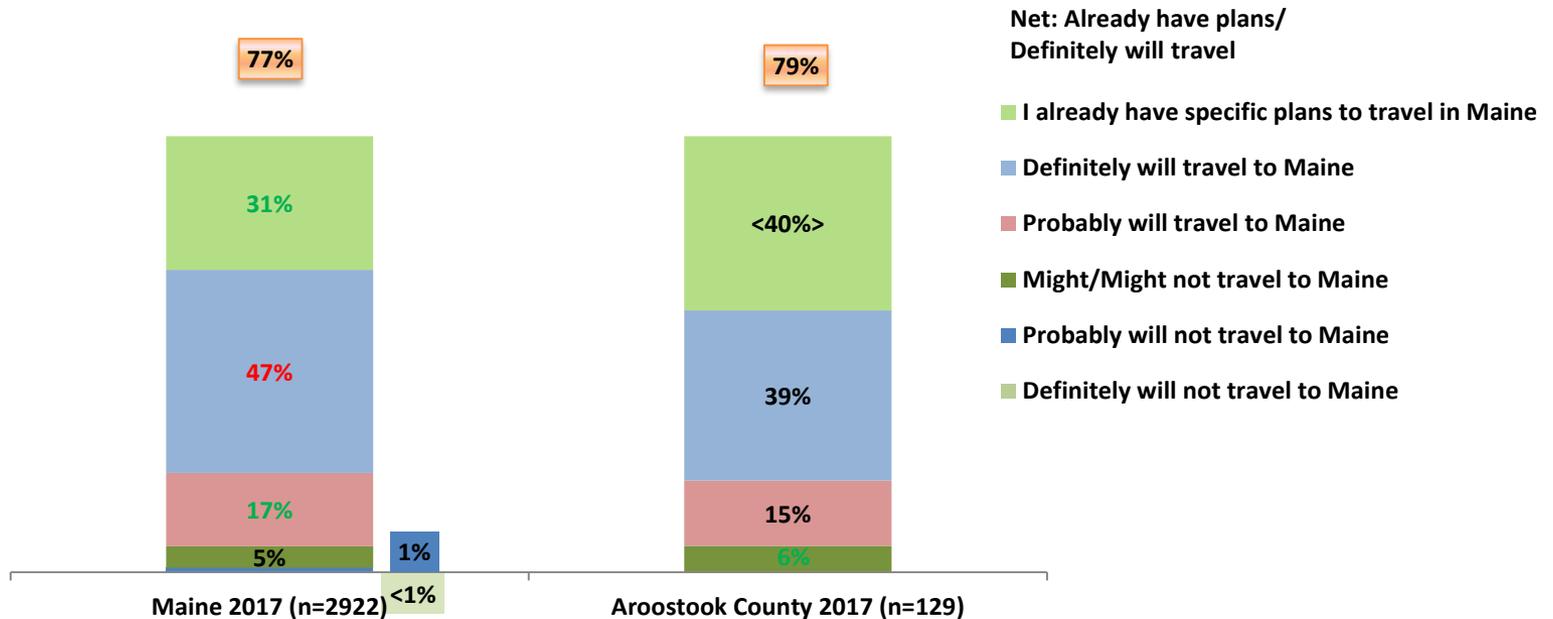


Q32. Within the region(s) you visited, what specific attractions or locations did you visit? Please select all that apply.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Four in five overnight visitors to Aroostook County intend to visit Maine again.

- A greater proportion of Aroostook County overnight visitors indicate that they *already have specific plans to travel in Maine* in the next two years as compared to overnight visitors to Maine overall.

Future Travel Likelihood



Q44. 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 Aroostook County are, on average, about 45 years old and earn about \$74,000 annually. Half have a college degree (52%), and 37% are employed full-time.

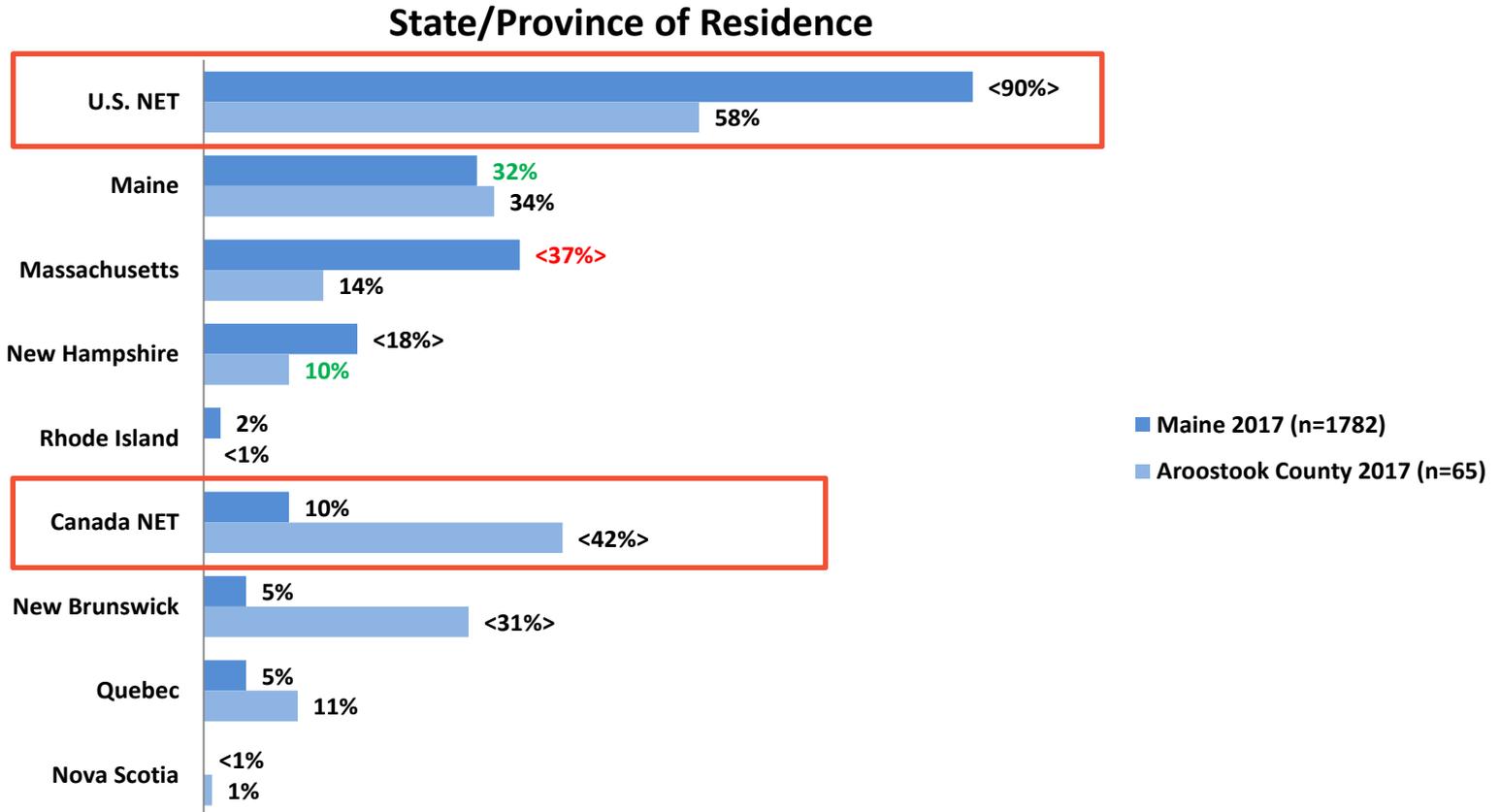
Day Visitors	Maine 2017 (n=1782)	Aroostook County 2017 (n=65)
Age:		
< 35	33%	29%
35 - 44	19%	17%
45 - 54	19%	17%
55 +	29%	37%
Mean Age (Years)	44.1	45.3
Income:		
< \$50,000	32%	43%
\$50,000 - \$99,999	41%	30%
\$100,000 +	27%	27%
Mean Income	\$80,800	\$73,900
Female	76%	66%
College Degree or Higher	54%	52%
Married	48%	42%
Employed Full-Time	<52%>	37%

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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.

In-state visitors and travelers arriving from New Brunswick comprise the greatest proportions of day visitors to Aroostook County.

- Aroostook County day visitors are far more likely to be from Canada (especially New Brunswick), as compared to day visitors to the State of Maine overall. They are far less likely to be from Massachusetts.



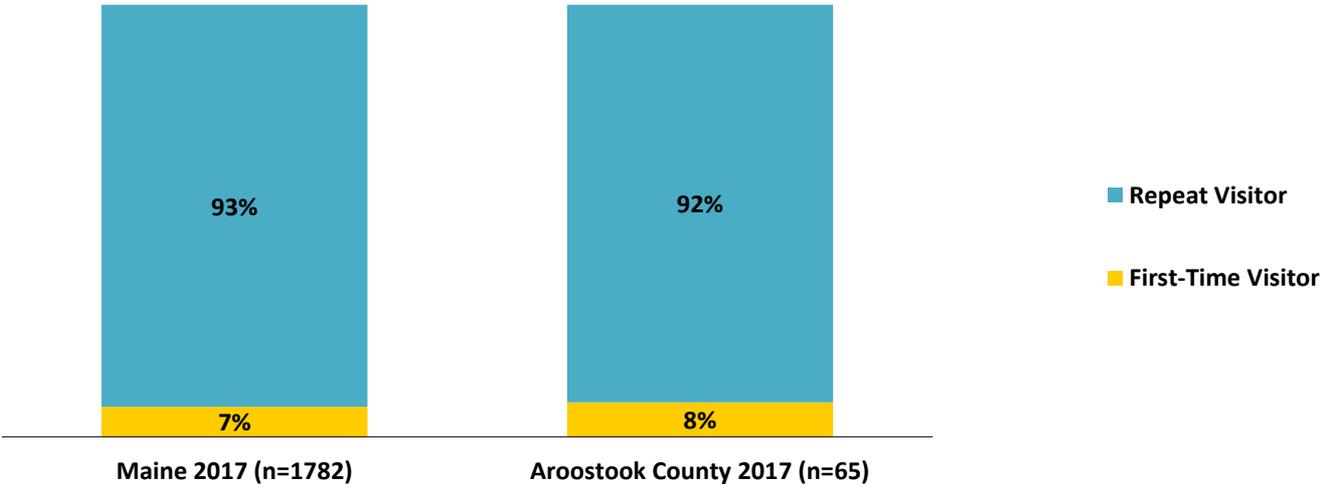
Q2. In which State or Province do you live?

<> indicates a significant difference between this region and the State 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 Aroostook County have visited Maine previously.

Repeat vs. First-Time Visitors



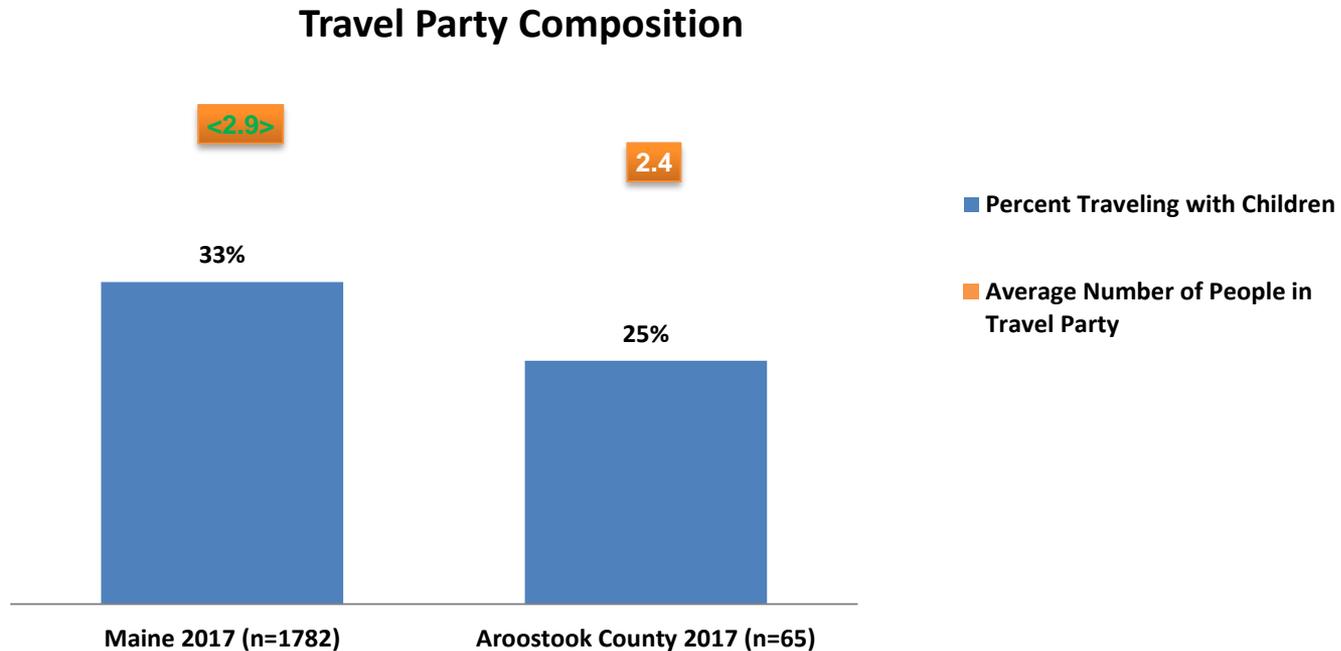
Q10. Was this your first trip to Maine?

<> indicates a significant difference between this region and the State 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 Aroostook County are traveling with children.

- On average, Aroostook County day visitors have smaller travel parties than visitors to the State as a whole.



Q15. Including yourself, how many people (adults and children) were in your immediate travel party on this specific trip to Maine?

Q16. How many of these people were: Children

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Day Visitors: Trip Experience

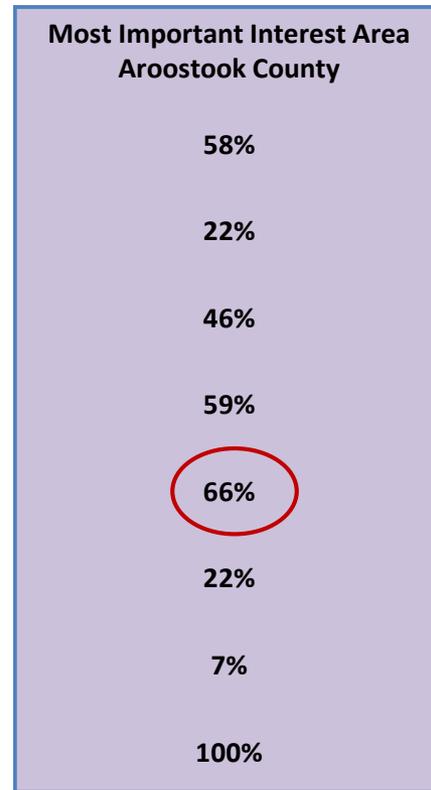
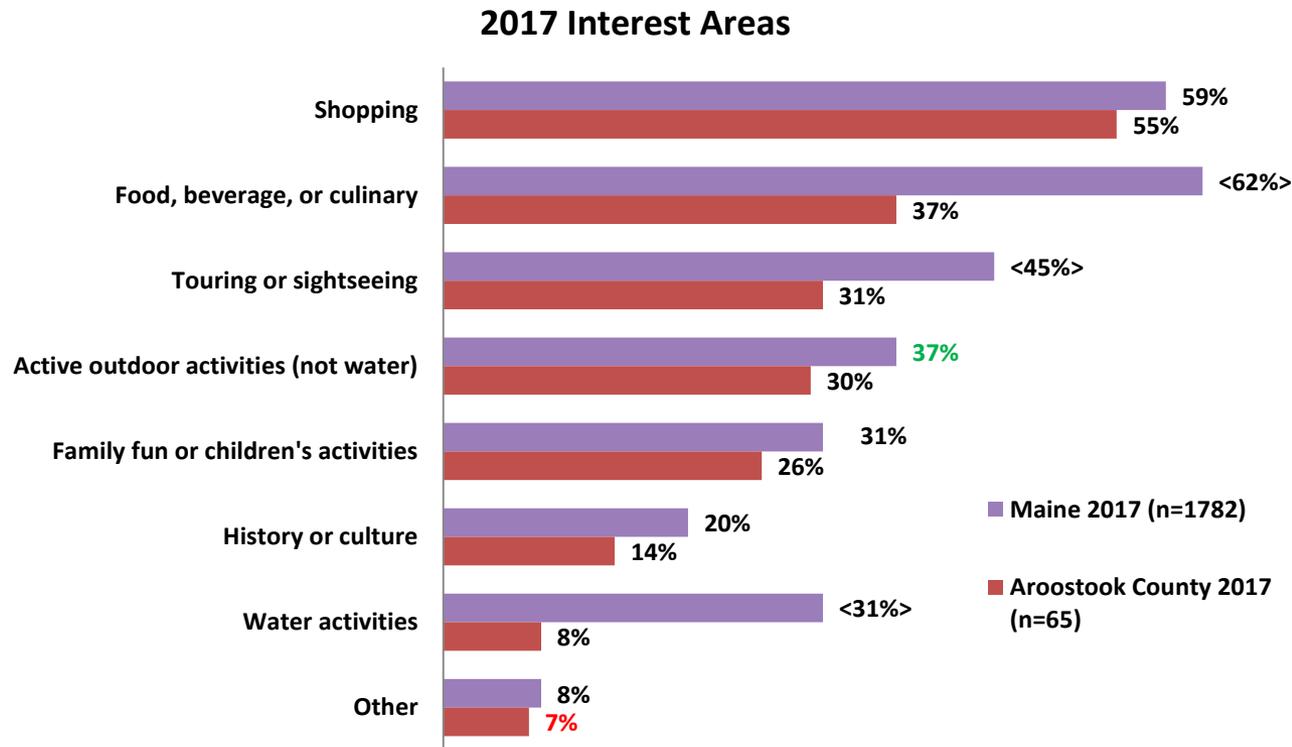
Sample Size Exclusions

Data for some questions is not presented on the following pages because the sample sizes are too small. The results not shown include:

- Primary purpose of business trips (n=15)
- Primary purpose of VFR trips (n=24)
- Trip Activities: Water (n=5)
- Trip Activities: History/Culture (n=9)
- Trip Activities: Family Fun/Children's Activities (n=17)
- Trip Activities: Touring/Sightseeing (n=20)
- Trip Activities: Food/Beverage/Culinary (n=24)
- Trip Activities: Active Outdoor Activities (n=20)

Shopping is the most common interest area among day visitors to Aroostook County.

- Aroostook County day visitors are less likely than day visitors to the State overall to be interested in *food/beverage/culinary activities, touring/sightseeing, and water activities*.
- Two-thirds of day visitors selecting *family fun or children's activities* as an interest area indicate that it was the most important interest area in their decision to visit.



Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q19. 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.

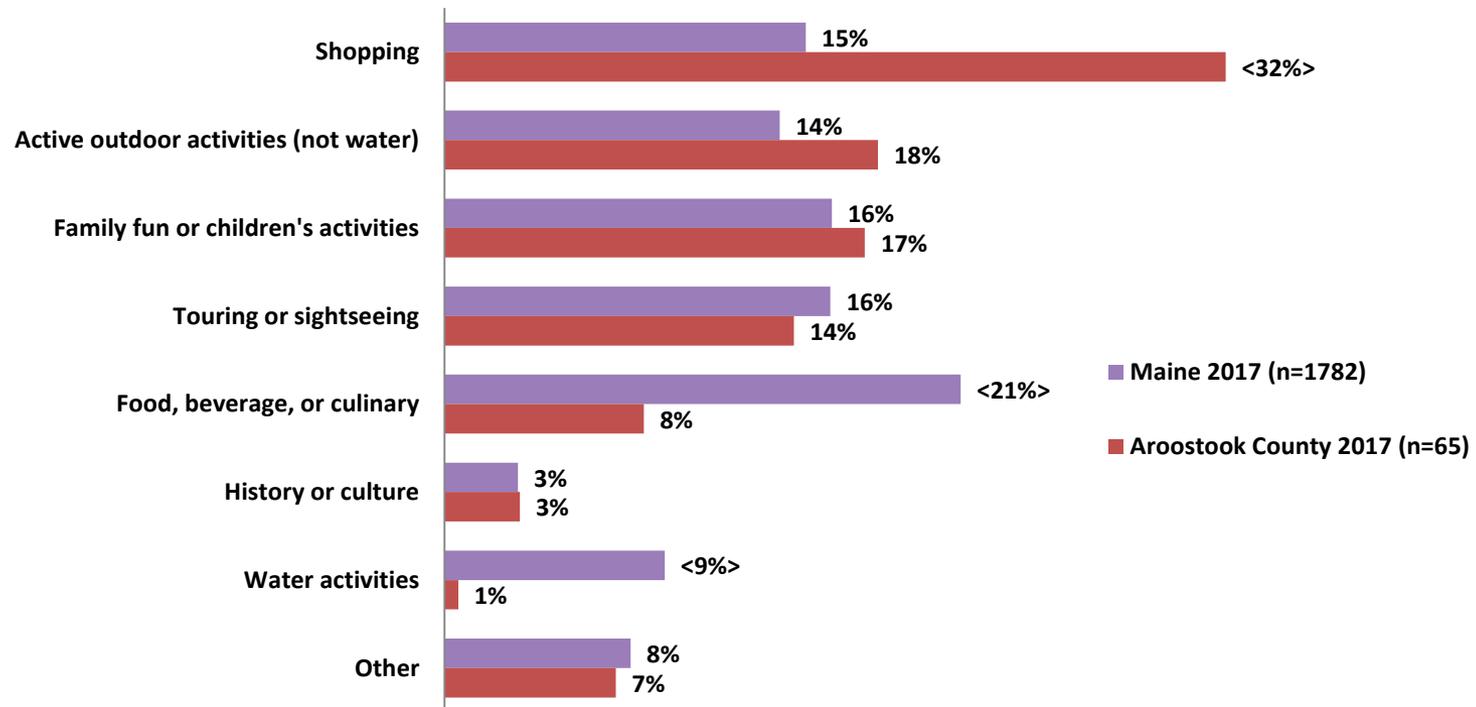
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

When considering both interest and importance in deciding to visit, shopping ranks highest by a large margin among day visitors to Aroostook County.

- Shopping is a more significant travel driver among day visitors to Aroostook County, as compared to day visitors to the State as a whole. Food/beverage/culinary activities and water activities are less significant drivers among day visitors to this region.

**2017 Interest Areas
Travel Driver Index**



Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q19. 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.

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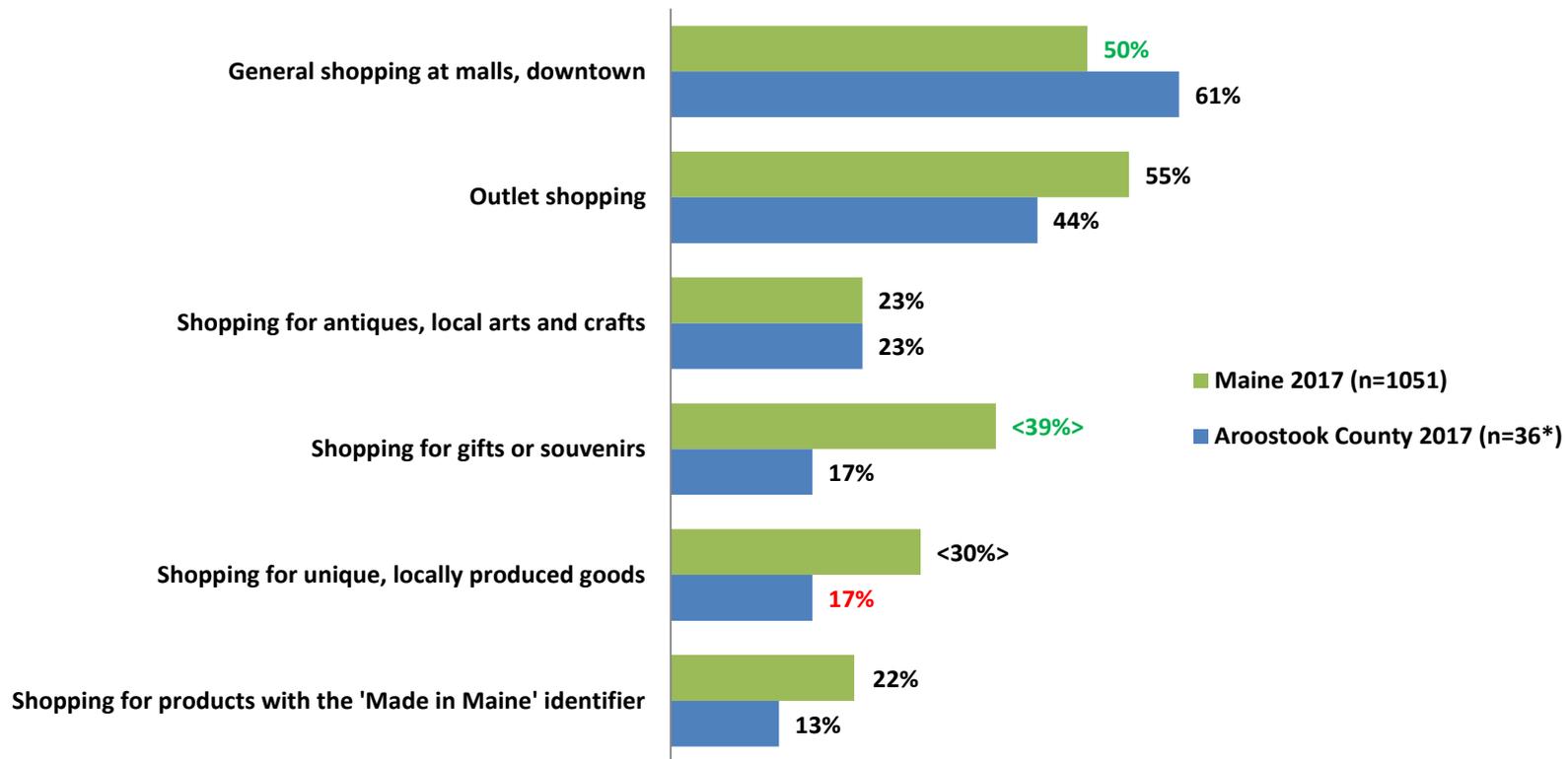
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Aroostook County day visitors interested in shopping are most likely to do some *general shopping at malls and downtown*.

- Shopping for gifts/souvenirs and shopping for unique, locally produced goods are less popular among shoppers in Aroostook County than among shoppers in Maine overall.

Shopping Activities

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



Q20. In which of the following activities did you participate during this trip? Please check all that apply.

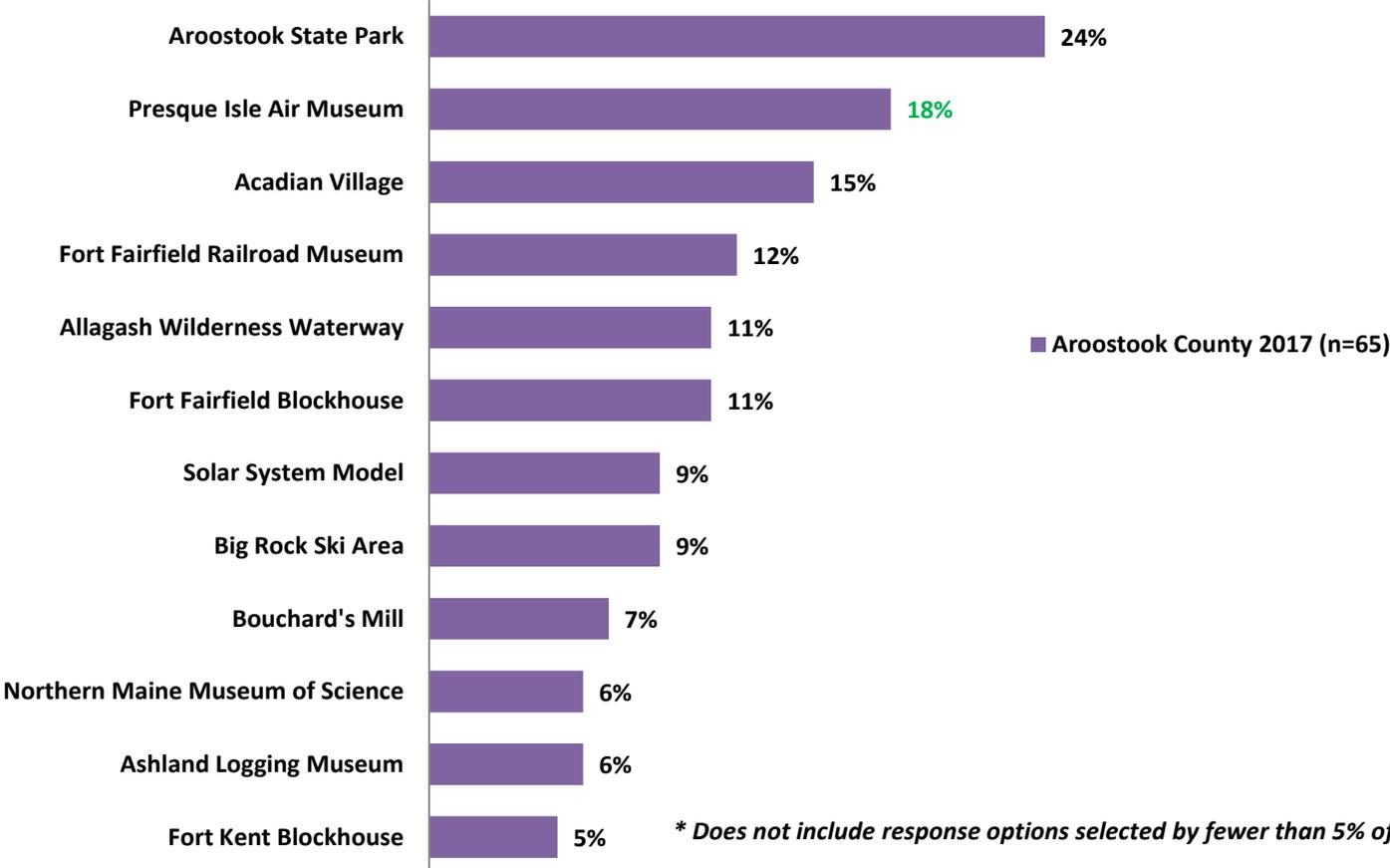
<> indicates a significant difference between this region and the State at the 95% confidence level.

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. Use caution when interpreting results.

Aroostook State Park is the most popular attraction among day visitors to Aroostook County.

Top Attractions/Locations Visited*



Q24: Within the region(s) you visited, what specific attractions or locations did you visit? Please select all that apply.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Comparison of Aroostook County Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to Aroostook County 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, the origin of the visitors, and the activities they participate in while visiting.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the entire State, Aroostook County visitors differ in the following ways:

OVERNIGHT VISITORS

Higher proportion from
Maine

Lower proportion from
Massachusetts

Visitor Origin

DAY VISITORS

Higher proportion from
Canada (especially
New Brunswick)

Lower proportion from
the **United States**
(especially **MA** and **NH**)

Visitor Demographics

OVERNIGHT VISITORS

Younger

More likely to be visiting for the first time

Smaller party size

Visitor Demographics

DAY VISITORS

Smaller party size
Less likely to be employed full-time

Trip Interest Areas

DAY VISITORS

**Less likely to want to
pursue:**

Food/beverage/culinary

Water activities

OVERNIGHT VISITORS

**Less likely to want to
pursue:**

Touring or sightseeing

Shopping

Food/beverage/culinary

Water activities

Trip Interest and Importance (Travel Driver Index)

OVERNIGHT AND DAY VISITORS

Less likely to place importance on:

Food/beverage/culinary

Water activities

Trip Interest and Importance (Travel Driver Index)

DAY VISITORS

OVERNIGHT VISITORS

**More likely to place
importance on shopping**

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

Trip Activities

OVERNIGHT VISITORS

Less likely to be:

Eating **lobster** or other local seafood

Enjoying the **ocean views/rocky coast**

Hiking/climbing/backpacking

Visiting **historic sites**

Outlet shopping

Trip Activities

DAY VISITORS

Less likely to be:

Shopping for **gifts or souvenirs**

Shopping for unique, **locally produced goods**



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