



Maine Office of Tourism Visitor Tracking Research 2017 Calendar Year Annual Report

Regional Insights: Kennebec Valley



Prepared by



May 2018

Table of Contents

Research Objectives and Methodology	3
Overnight Visitors:	
Traveler Description	7
Trip Experience	12
Day Visitors:	
Traveler Description	26
Trip Experience	31
Comparison of Kennebec Valley Visitors to All Maine Visitors	42

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 **Kennebec Valley** tourism region during 2017, including:
 - 183 overnight visitors, and
 - 121 day visitors.
- Throughout this report, data for the **Kennebec Valley** tourism region will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the tourism region and the State were calculated at the 95% confidence level and are noted throughout by < >. *(A statistically significant difference means the observed difference is more than would be expected by chance 95 out of 100 times.)*
- Statistically significant differences between 2016 and 2017 are also highlighted for both the Kennebec Valley region and the State of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.



Overnight Visitors: Traveler Description

Overnight Visitor Demographics

- Overnight visitors to the Kennebec Valley region are about 39 years old, on average, and have annual household incomes around \$87,000. Three-fifths have at least a college degree, and another three-fifths are employed full-time. Half are married.

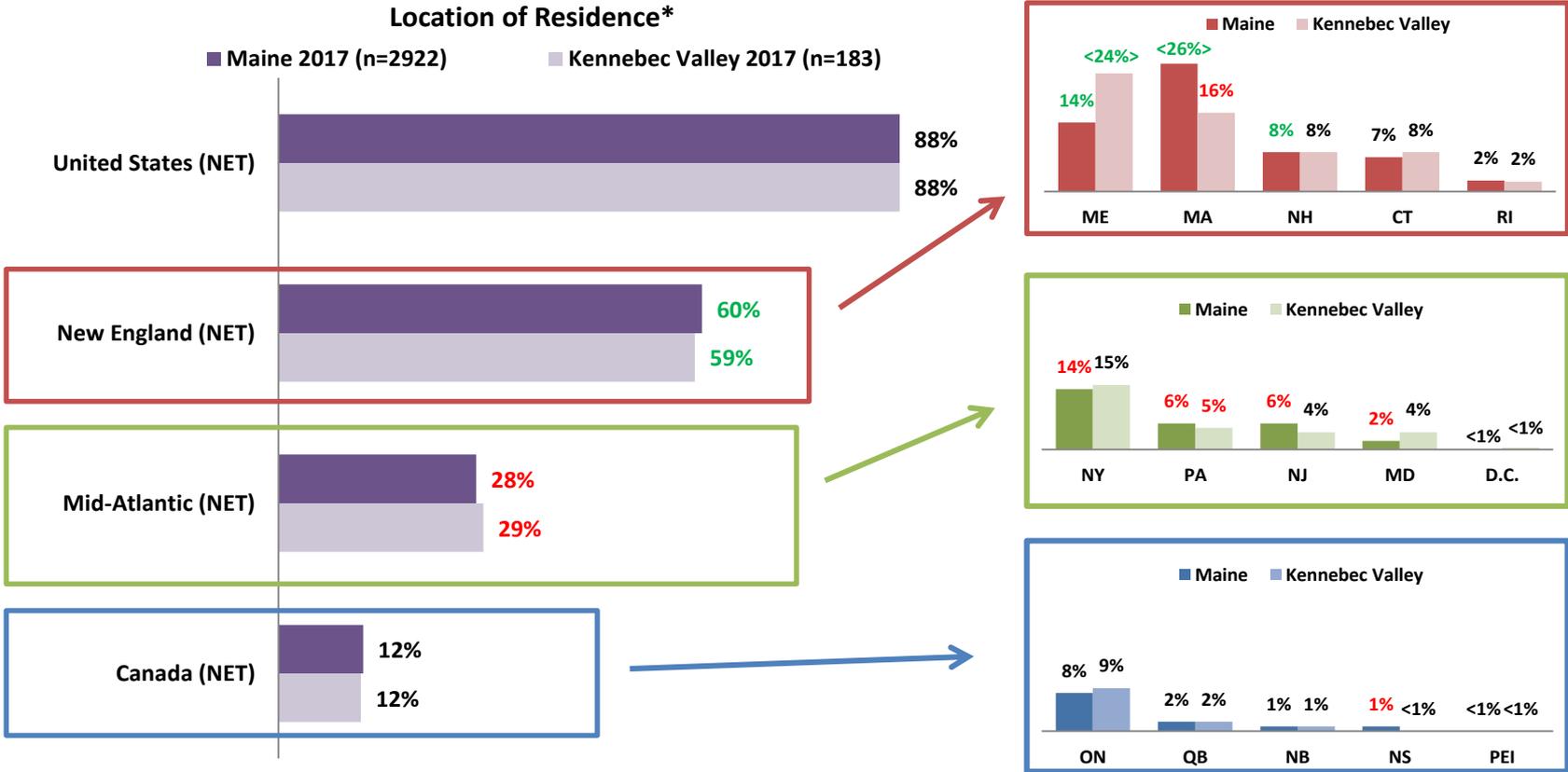
Overnight Visitors	Maine 2017 (n=2922)	Kennebec Valley 2017 (n=183)
Age:		
< 35	39%	45%
35 - 44	23%	24%
45 - 54	16%	12%
55 +	22%	19%
Mean Age (Years)	40.7	39.2
Income:		
< \$50,000	23%	<32%>
\$50,000 - \$99,999	43%	35%
\$100,000 +	34%	33%
Mean Income	\$92,700	\$87,100
Female	70%	64%
College Degree or Higher	65%	61%
Married	50%	51%
Employed Full-Time	62%	59%

<> 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.

Most overnight visitors to the Kennebec Valley region originate from New England.

- One-fourth of Kennebec Valley’s overnight visitors – the largest share – are in-state visitors, a significantly greater proportion than for the State as a whole. The Kennebec Valley region attracts a lower proportion of visitors from Massachusetts than does the State overall.



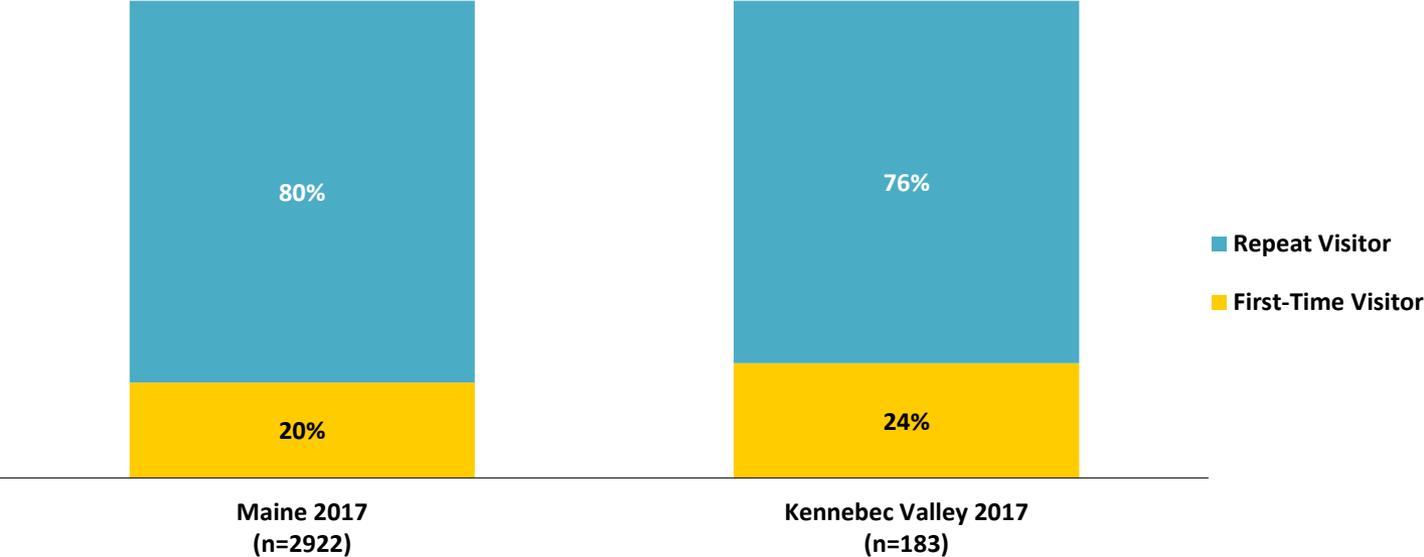
*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine’s core advertising markets.

<> 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.

Three in four overnight visitors to the Kennebec Valley have previously visited Maine.

Repeat vs. First-Time Visitors

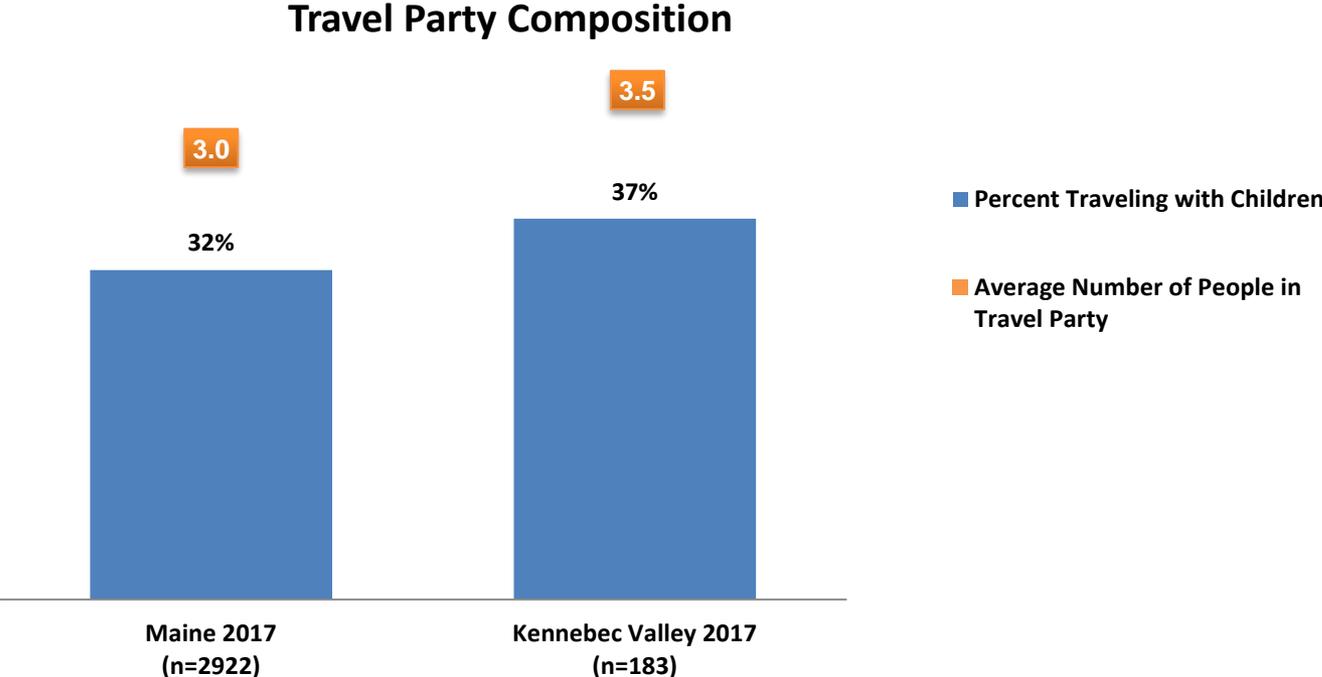


Q11. Was this your first visit in Maine?

<> 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.

Roughly one-third of overnight visitors to the Kennebec Valley are traveling with children.



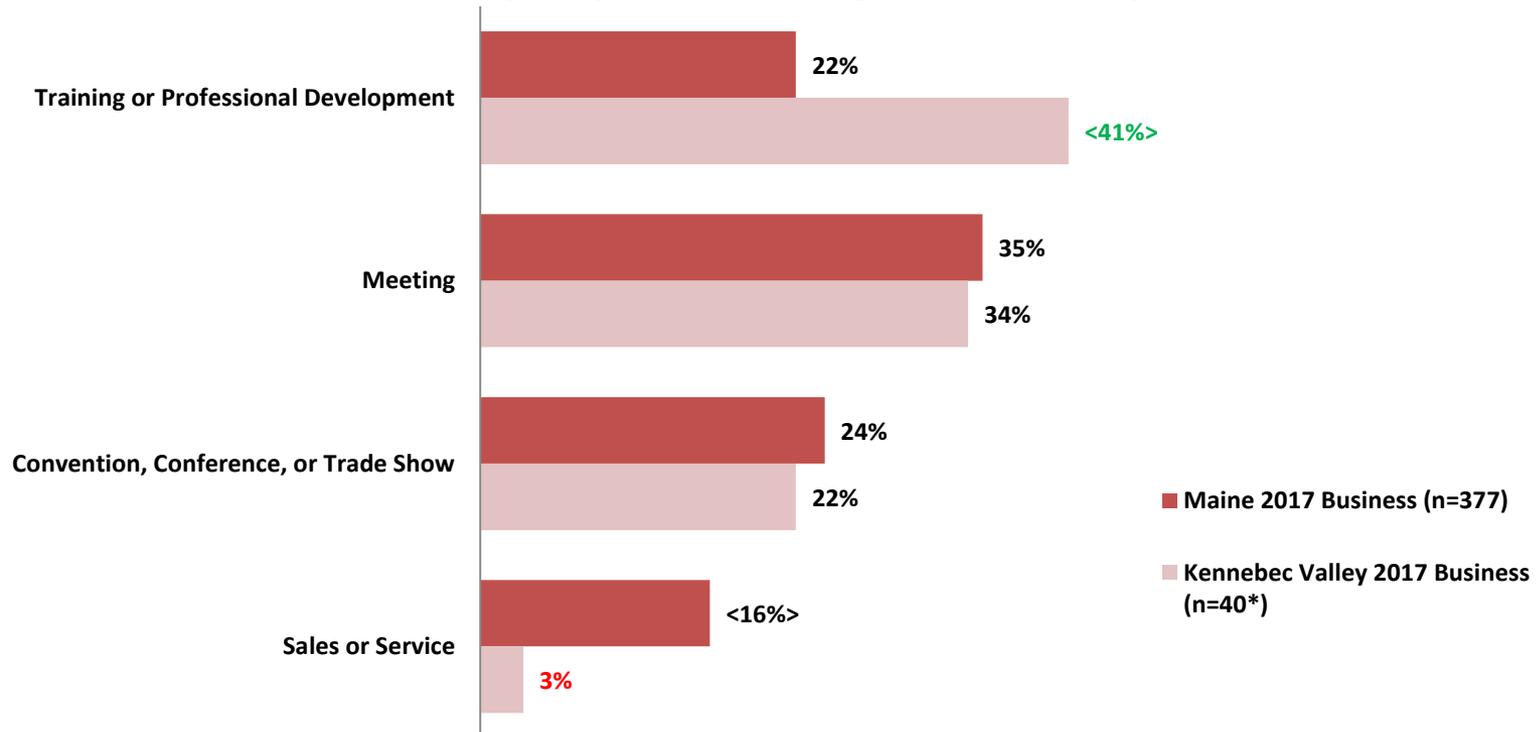
Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q25. How many of these people were: Children?
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: Trip Experience

Two in five overnight business travelers to the region cite *training or professional development* as the primary purpose of their trip.

- Overnight business travelers to the Kennebec Valley region are more likely to list *training or professional development* as the purpose of their business trip than are business travelers to the State overall.

Primary Purpose of Overnight Business Trips



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

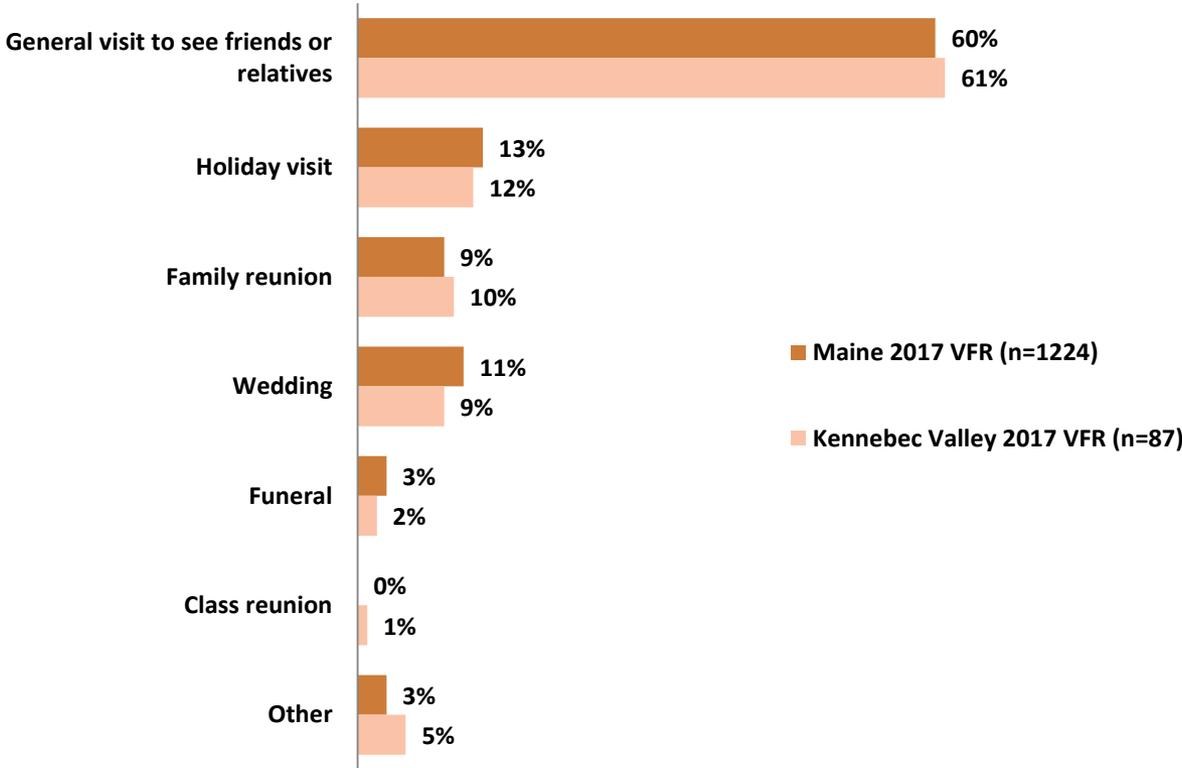
<> indicates a significant difference between this region and the State at the 95% confidence level.

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 the Kennebec Valley 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?

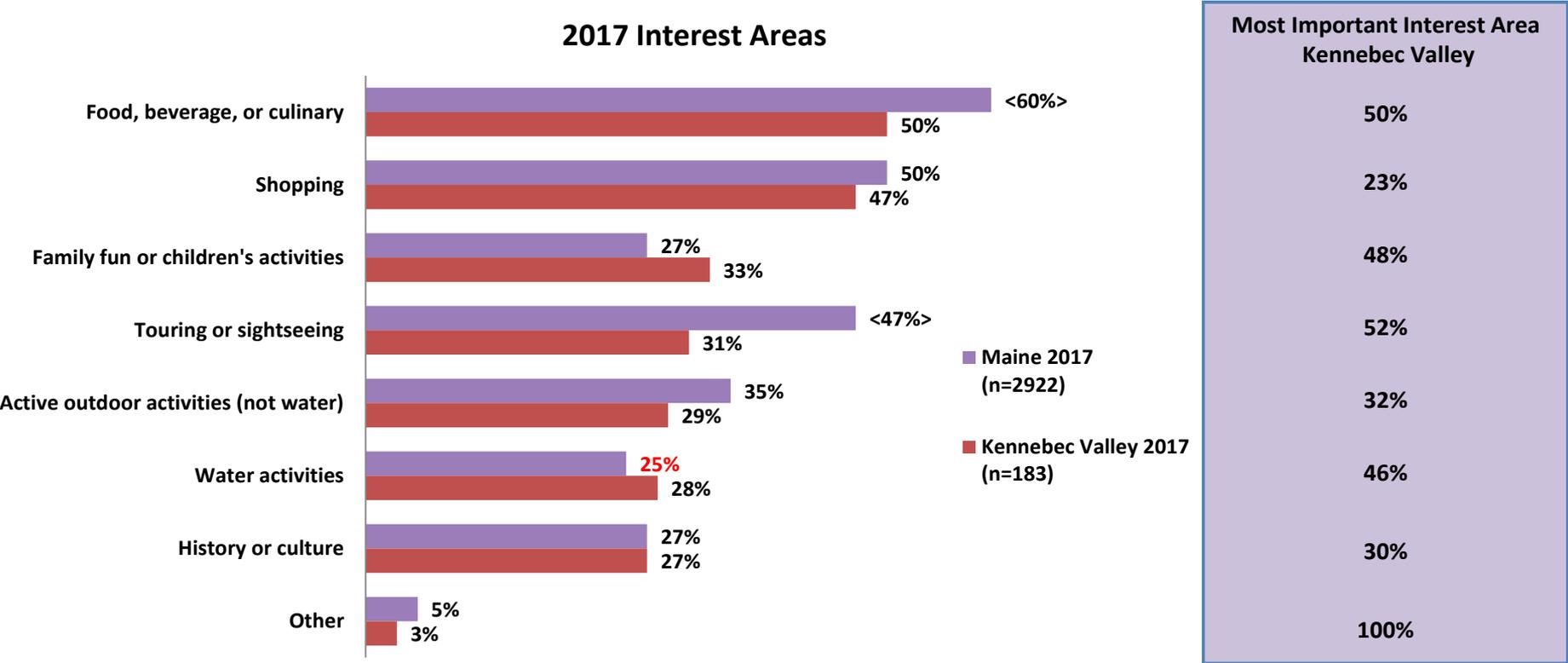
<> indicates a significant difference between this region and the State at the 95% confidence level.

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 common interest areas among Kennebec Valley overnight visitors include *food/beverage/culinary* activities and *shopping*.

- Despite *food/beverage/culinary* activities being the most common interest area among these overnight visitors, these activities are less common among visitors to the Kennebec Valley than among visitors to the State as a whole. Kennebec Valley visitors are also less likely to be interested in *touring or sightseeing* as compared to overnight visitors to the State of Maine overall.



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

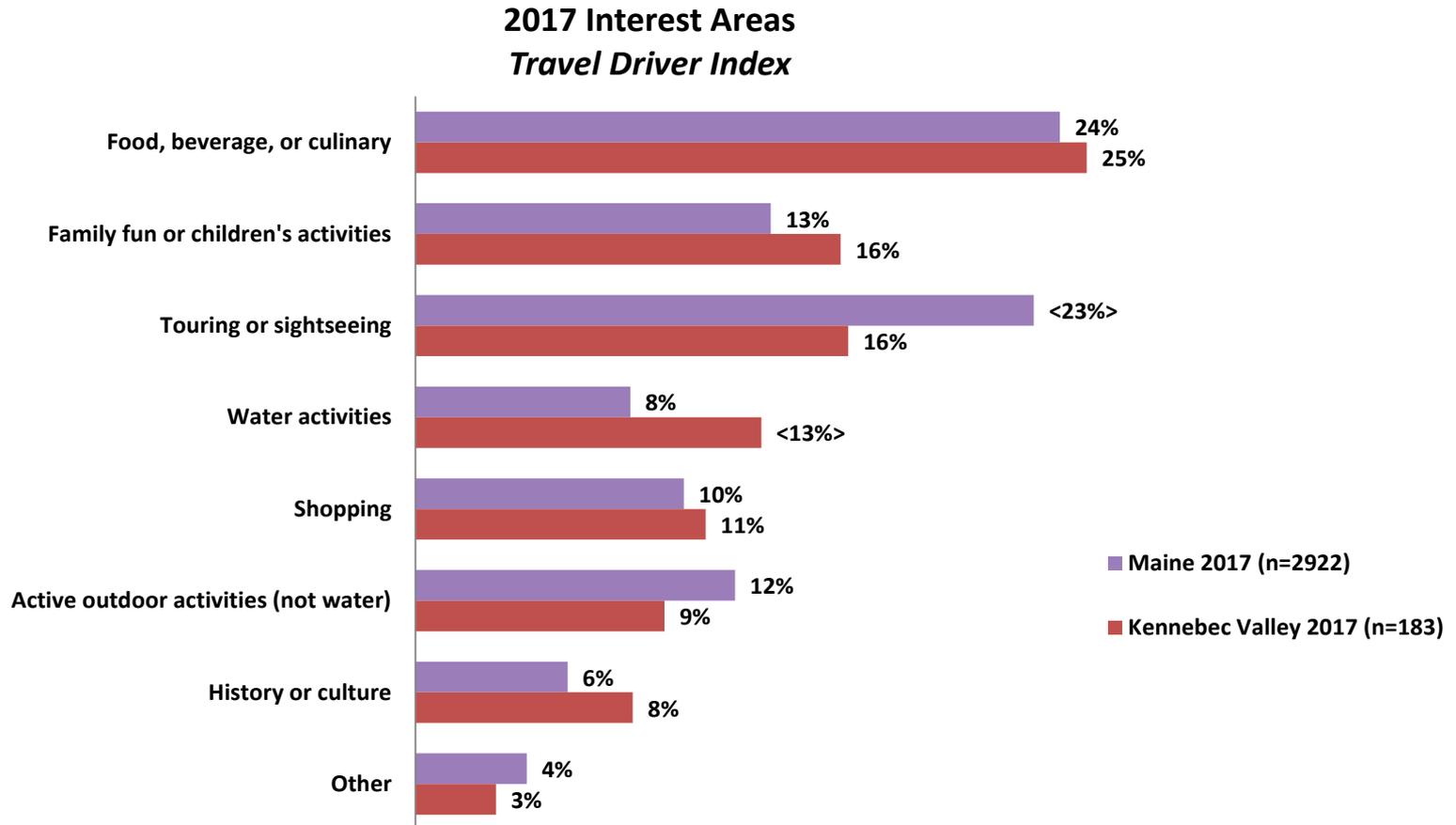
<> indicates a significant difference between this region and the State at the 95% confidence level.

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, *food/beverage/culinary* activities rank highest among overnight visitors to this region.

- *Touring/sightseeing* activities are a less important visitation driver among visitors to the Kennebec Valley region than among visitors to the State overall, while *water activities* are a more important visitation driver among Kennebec Valley overnight visitors.



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

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. 16

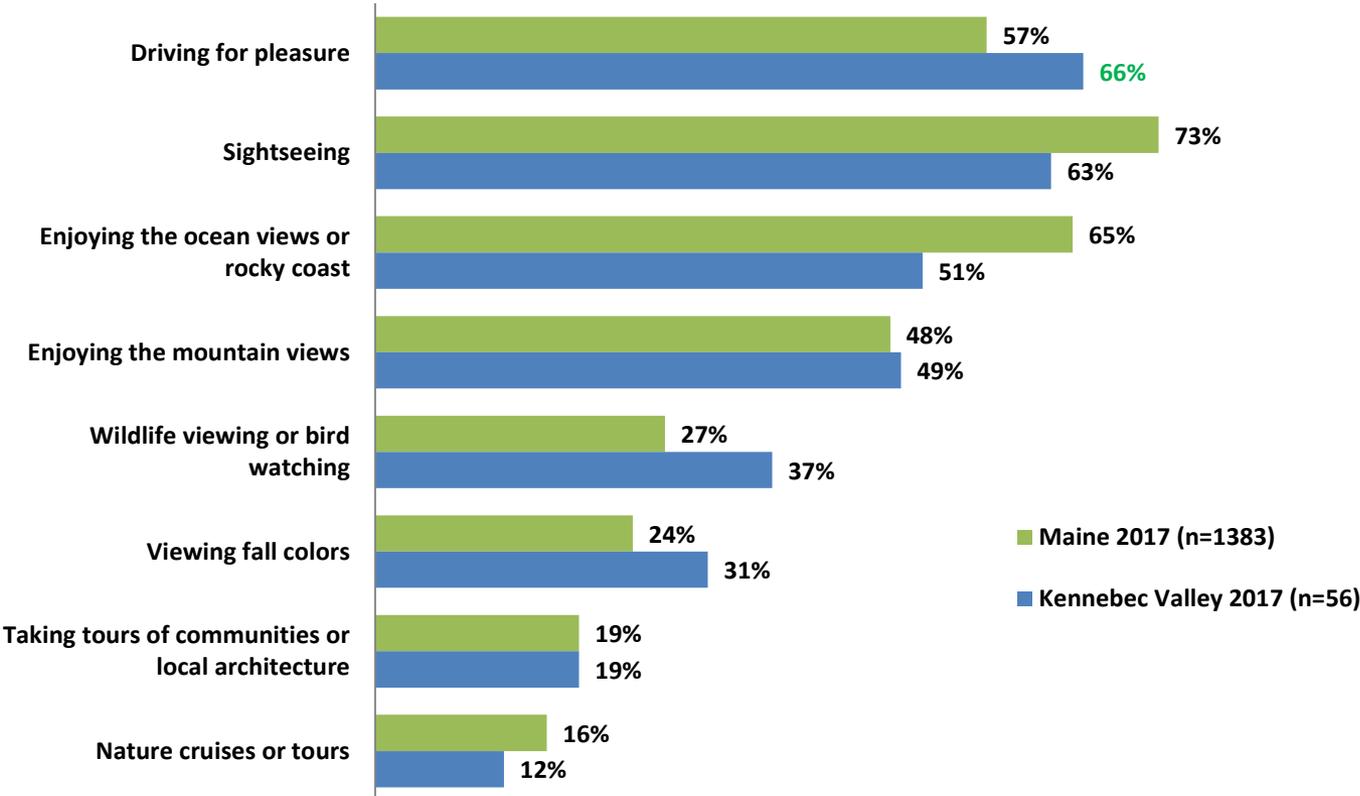
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Driving for pleasure and sightseeing are the most common touring/sightseeing activities among overnight visitors to this region.

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.

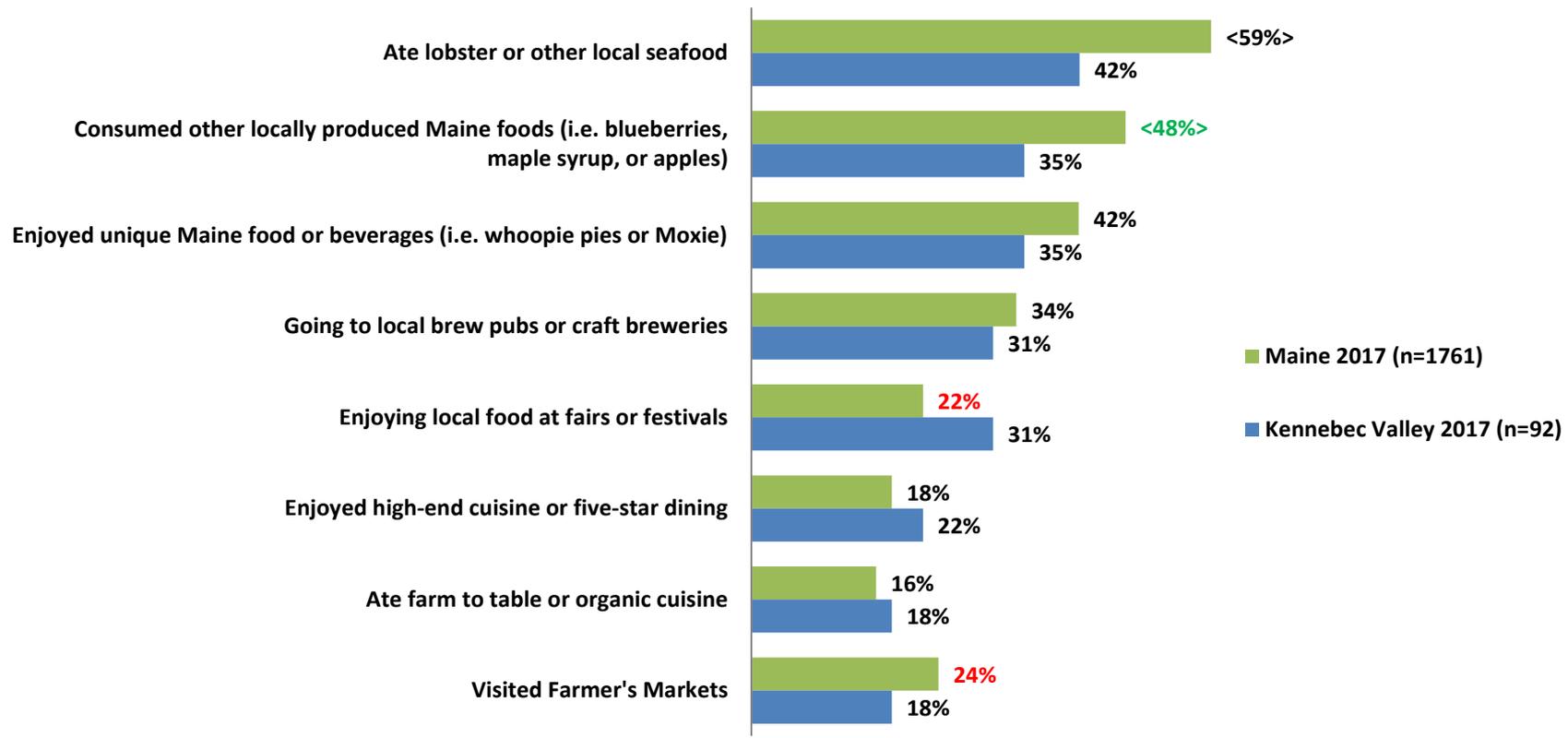
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Eating lobster or other local seafood is the most common food/beverage/culinary activity among overnight visitors to the Kennebec Valley who are interested in these activities.

- Among overnight visitors interested in food/beverage/culinary activities, those visiting the Kennebec Valley are less likely to *eat lobster or other local seafood* and *consume other locally produced Maine foods* than are those visiting the State of Maine overall.

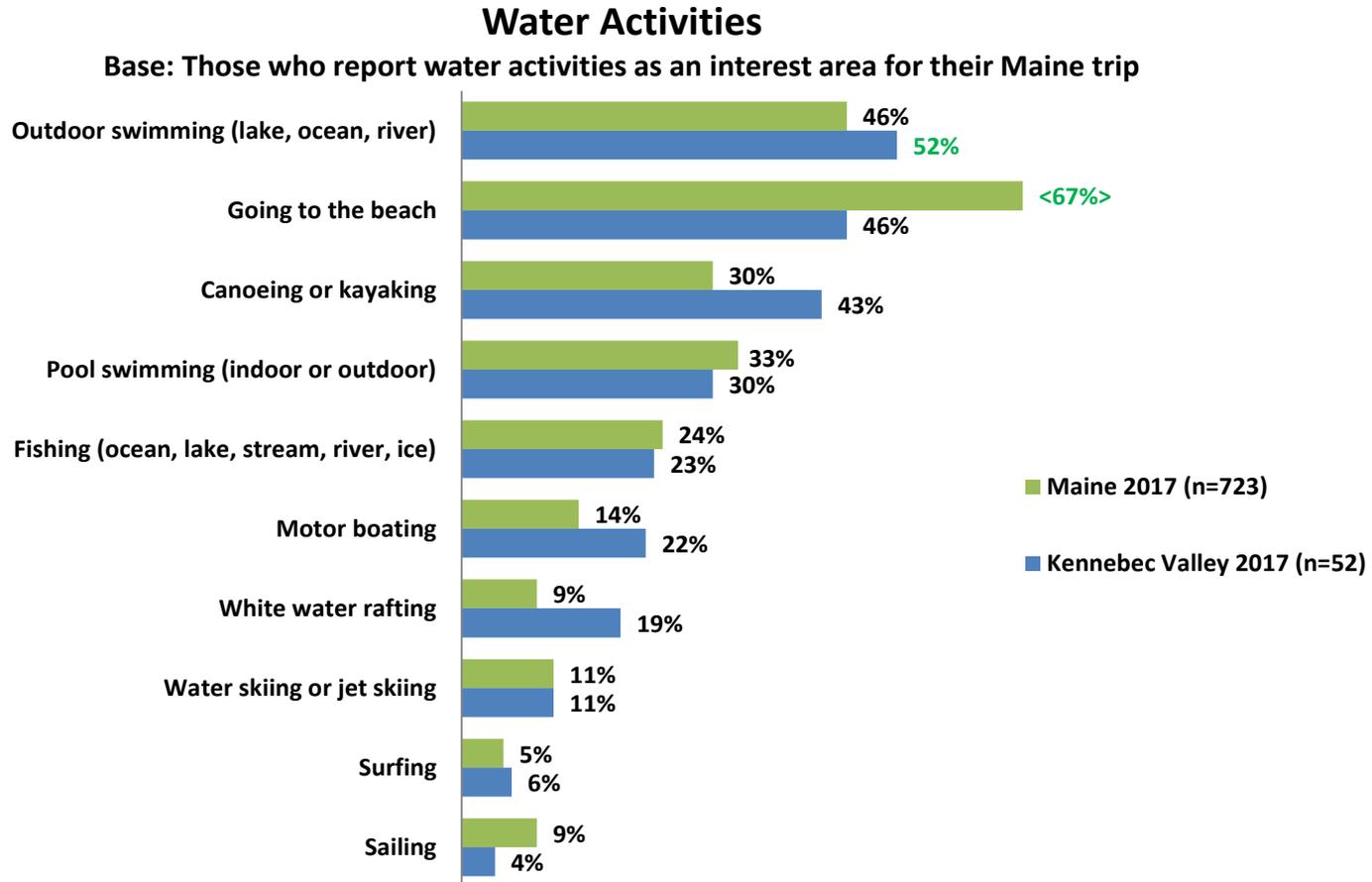
Food, Beverage, or Culinary Activities

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



Outdoor swimming, going to the beach, and canoeing/kayaking are the most common water activities pursued by overnight visitors to this region.

- A lesser proportion of Kennebec Valley visitors go to the beach as compared to overnight visitors to the State of Maine overall.



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.

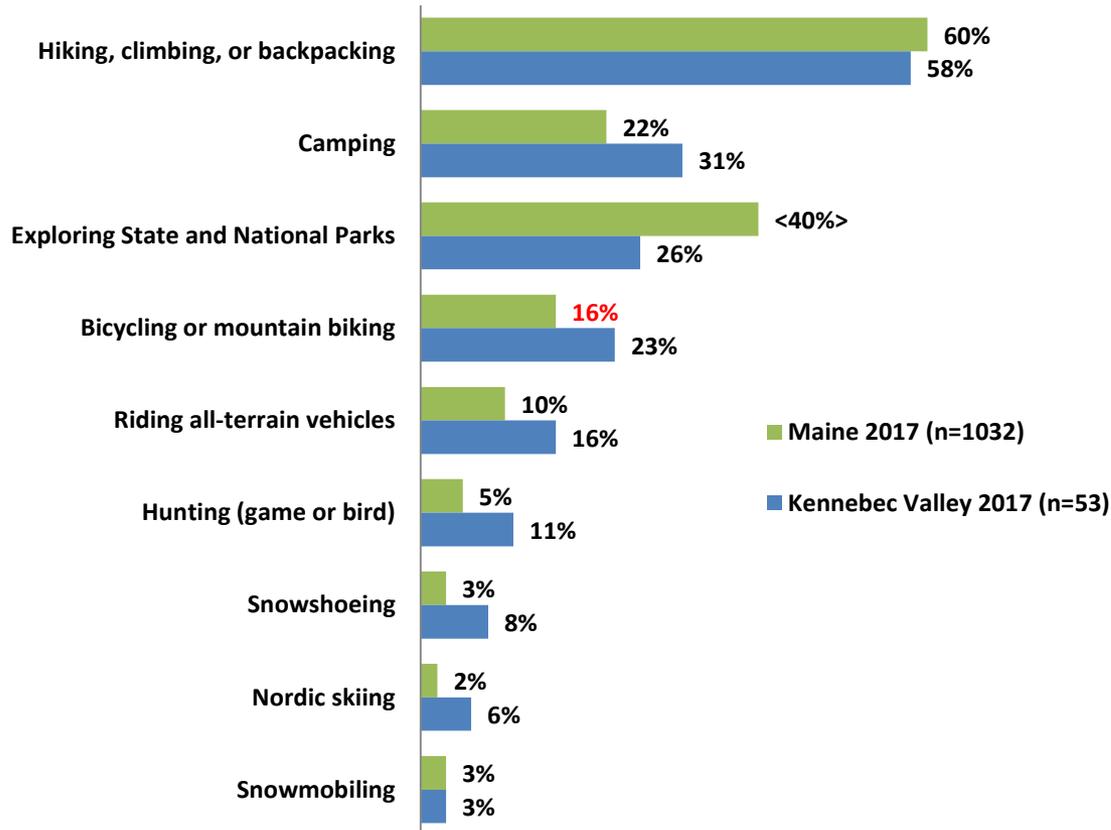
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Hiking/climbing/backpacking is by far the most common active outdoor activity among the region's overnight visitors.

- *Exploring State and National Parks* is a less popular activity among this region's overnight visitors than among overnight visitors to the State of Maine 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.*

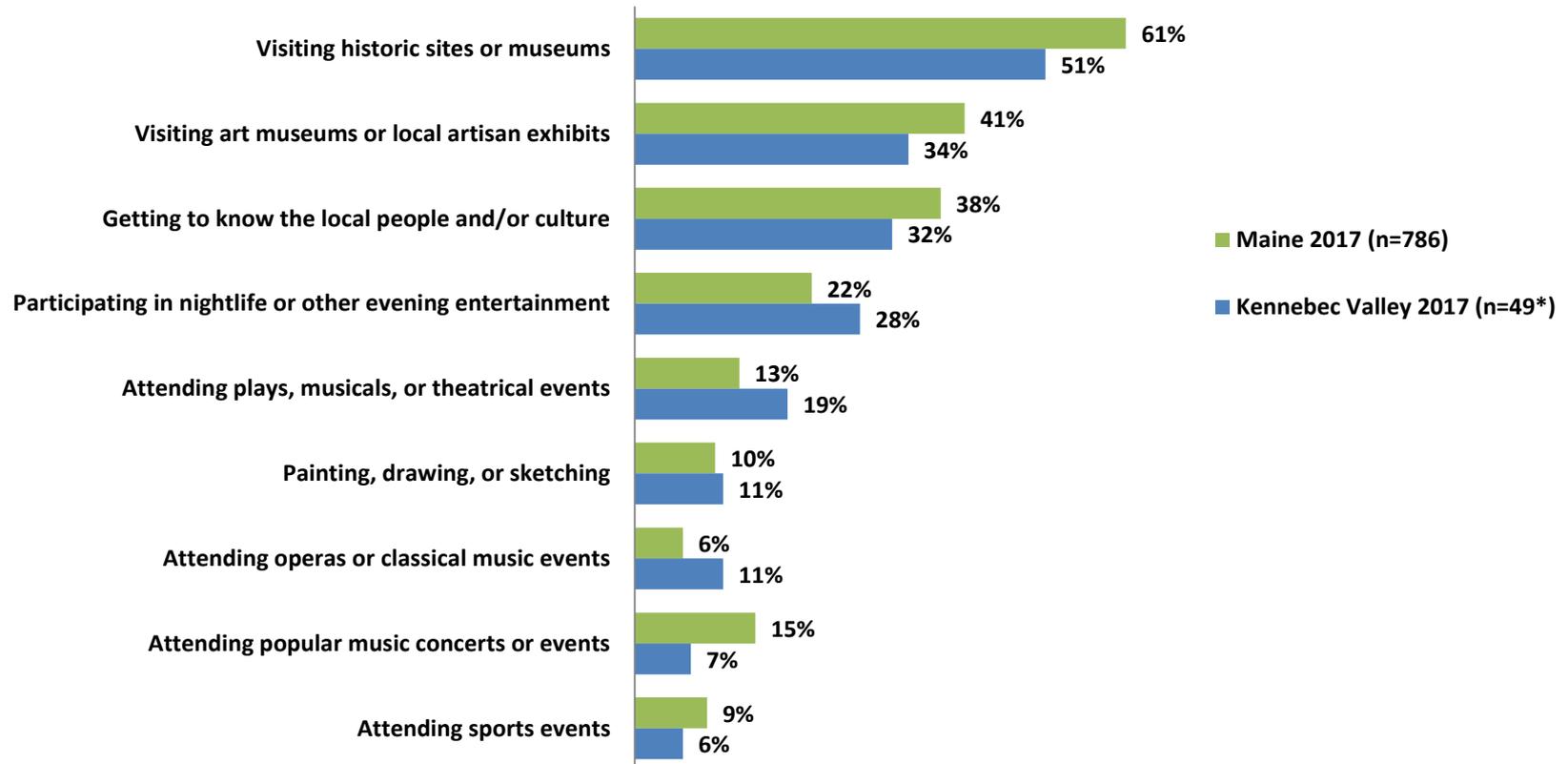
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Visiting historic sites/museums is the most common history/culture activity pursued by overnight visitors to the Kennebec Valley region.

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.

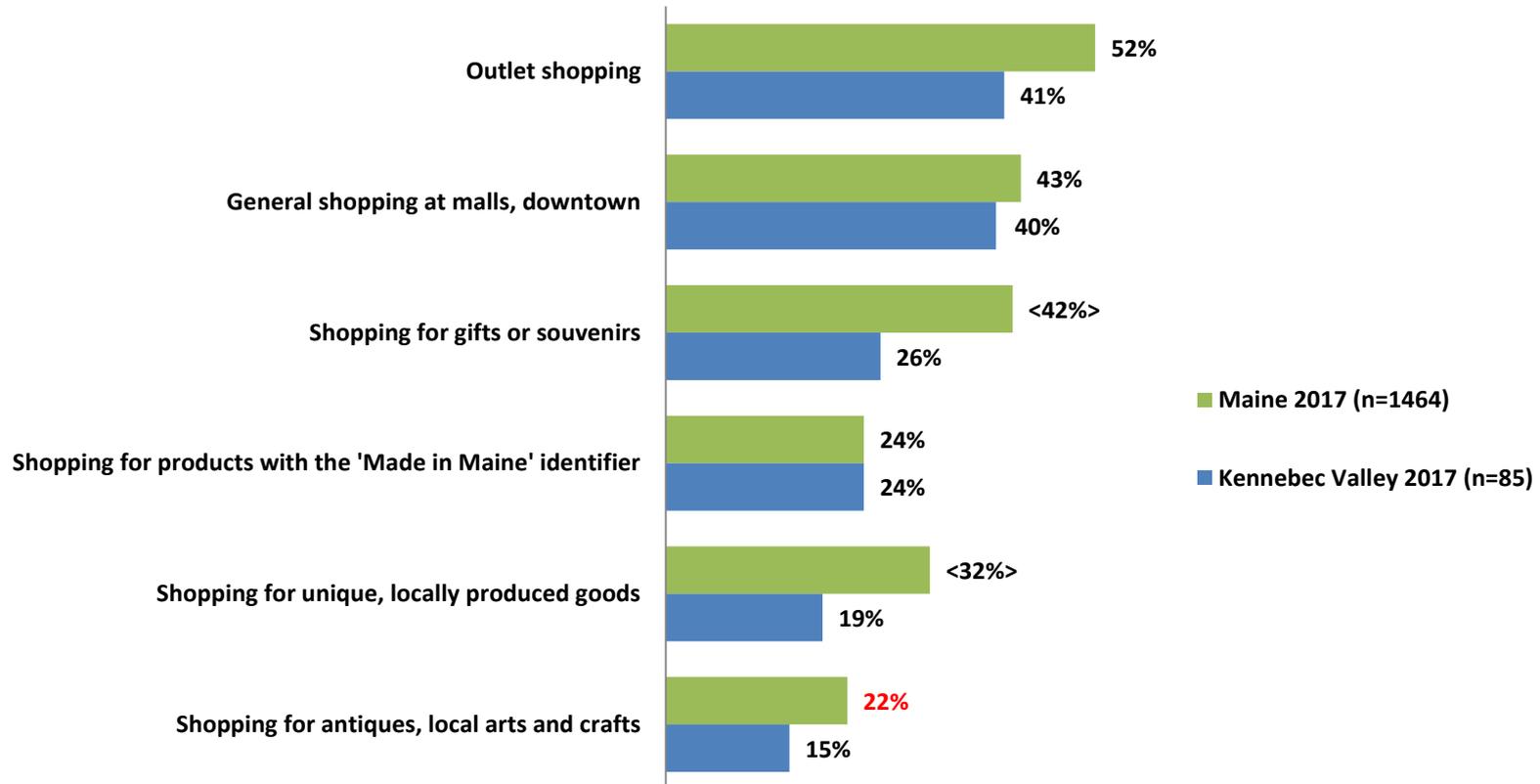
*Please note small sample size. Use caution when interpreting results.

Outlet shopping and general shopping at malls/downtown are the most popular shopping activities in the Kennebec Valley region.

- Shopping for gifts/souvenirs and shopping for unique, locally produced goods are less popular among overnight visitors to the Kennebec Valley region as compared to overnight visitors to Maine overall.

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.

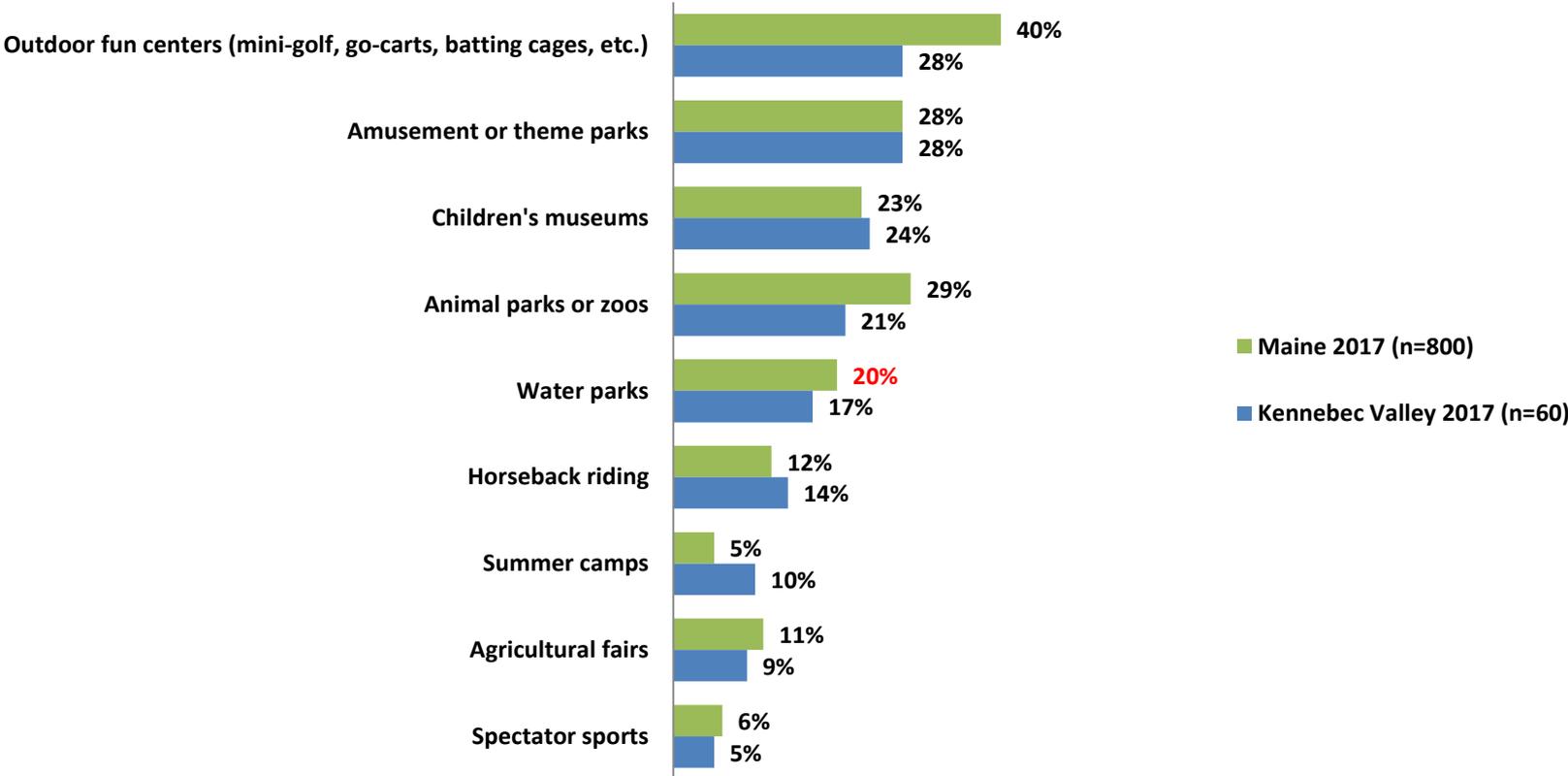
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

A number of family fun/children’s activities are equally popular among overnight visitors to the Kennebec Valley region.

Family Fun/Children’s Activities

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



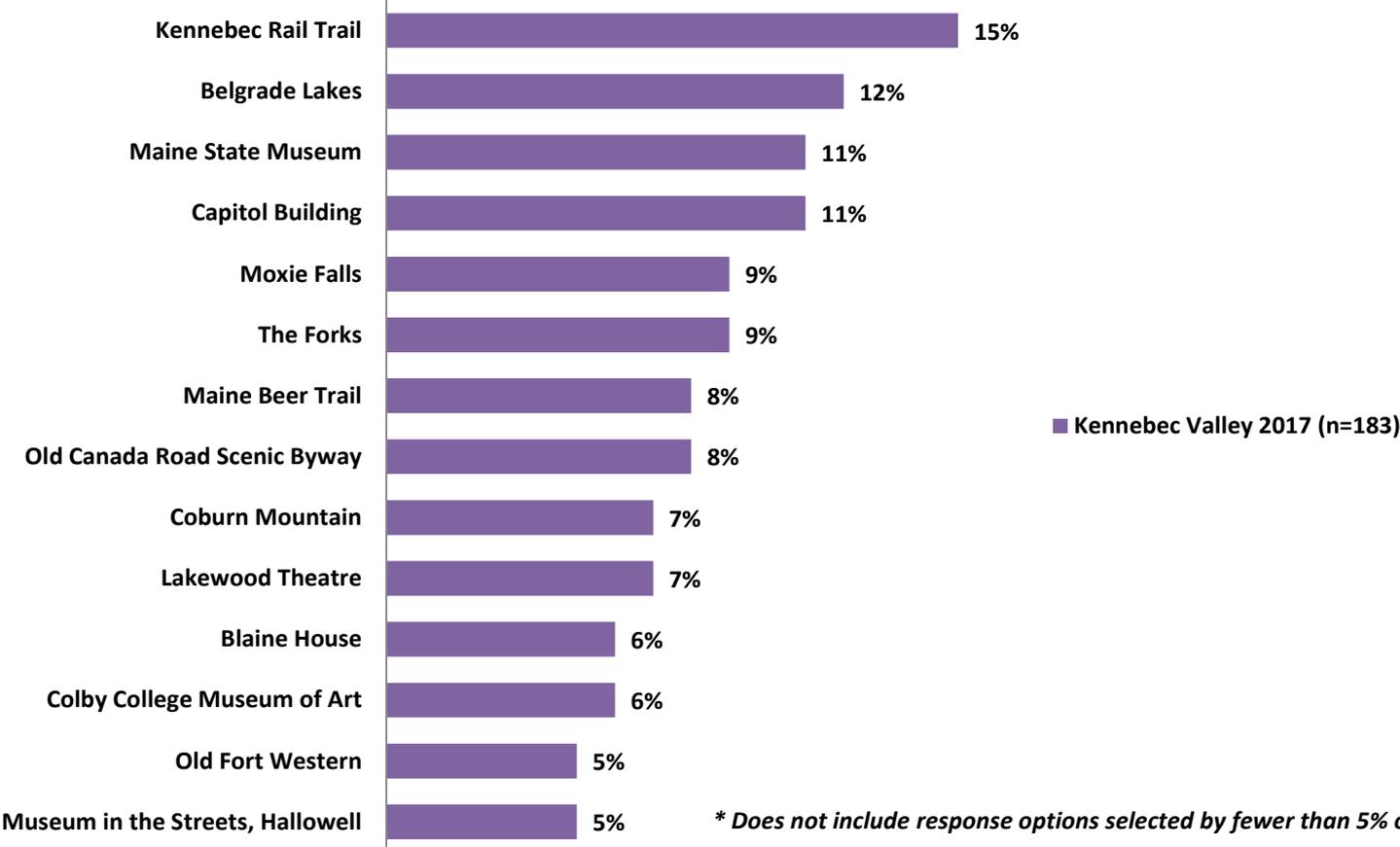
Q37. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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.

The Kennebec Rail Trail is the most popular attraction among overnight visitors to the Kennebec Valley region.

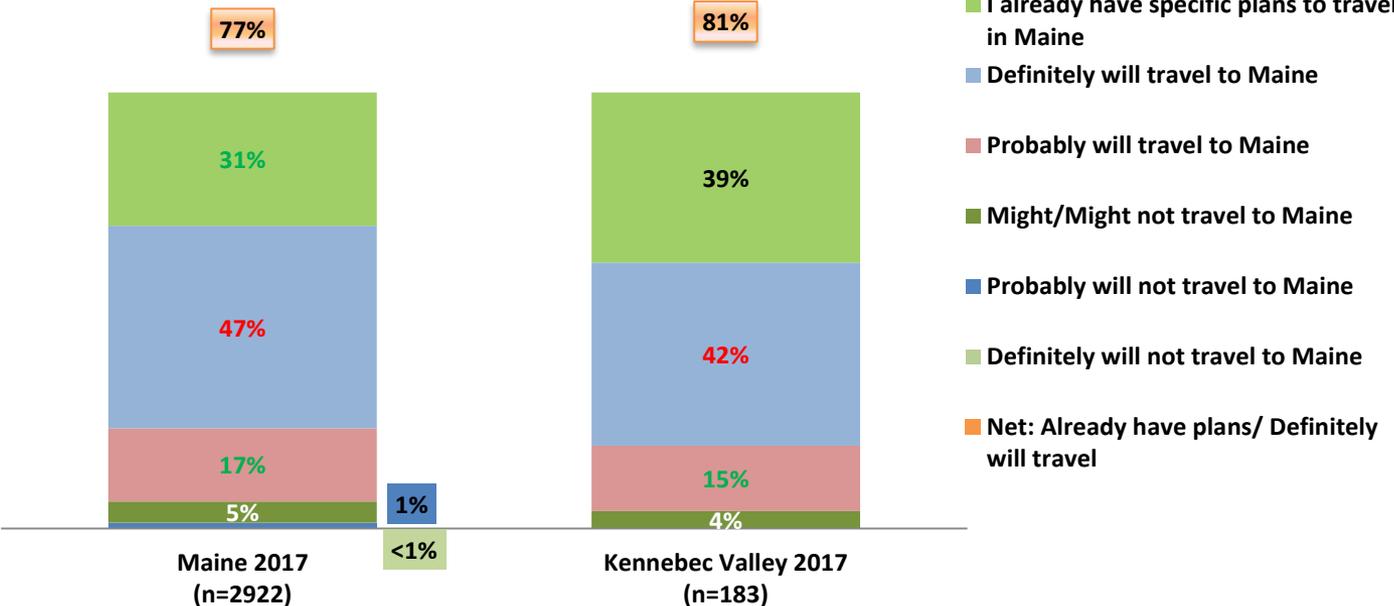
Top Attractions/Locations Visited*



Q32. Within the region you visited, what specific towns or cities did you visit? Please check 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 out of five overnight visitors to the Kennebec Valley plan to return to Maine in the next two years.

Future Travel Likelihood



Q44. How likely will you be to travel in Maine in the next two years?

<> 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.

Day Visitors: Traveler Description

Day Visitor Demographics

- Day visitors to the Kennebec Valley region are 46 years of age, on average, and earn about \$65,000 annually. Half have a college degree, and half are employed full-time.
- Day visitors to the Kennebec Valley region have lower annual household incomes than day visitors to the State overall.

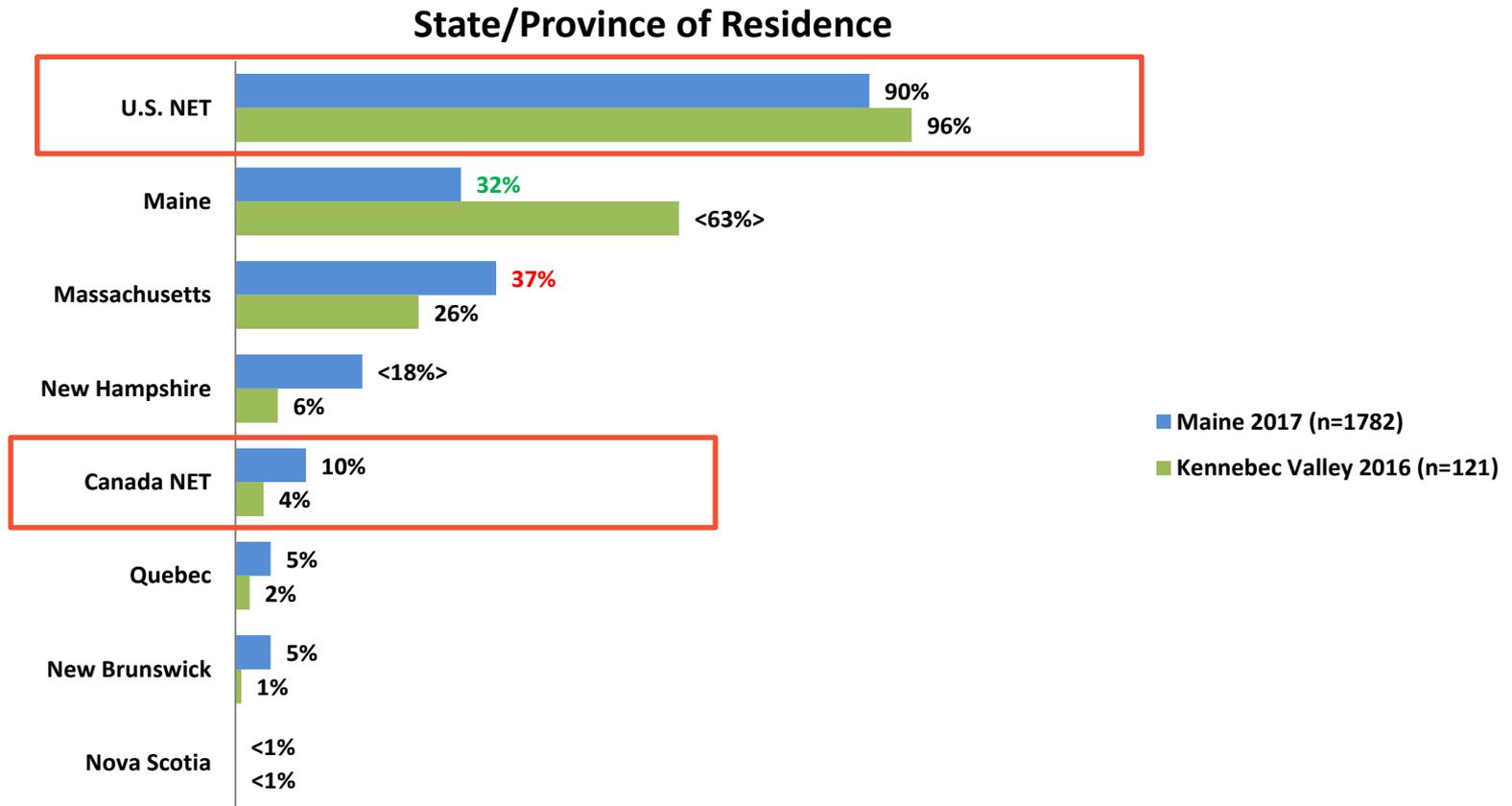
Day Visitors	Maine 2017 (n=1782)	Kennebec Valley 2017 (n=121)
Age:		
< 35	33%	29%
35 - 44	19%	13%
45 - 54	19%	29%
55 +	29%	30%
Mean Age (Years)	44.1	46.0
Income:		
< \$50,000	32%	45%
\$50,000 - \$99,999	41%	37%
\$100,000 +	27%	19%
Mean Income	<\$80,800>	\$64,700
Female	76%	76%
College Degree or Higher	54%	47%
Married	48%	58%
Employed Full-Time	52%	54%

<> 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.

Two-thirds of day visitors to the Kennebec Valley region are in-state visitors.

- Kennebec Valley day visitors are more likely to be from Maine as compared to day visitors to the State as a whole, and less likely to be from New Hampshire.



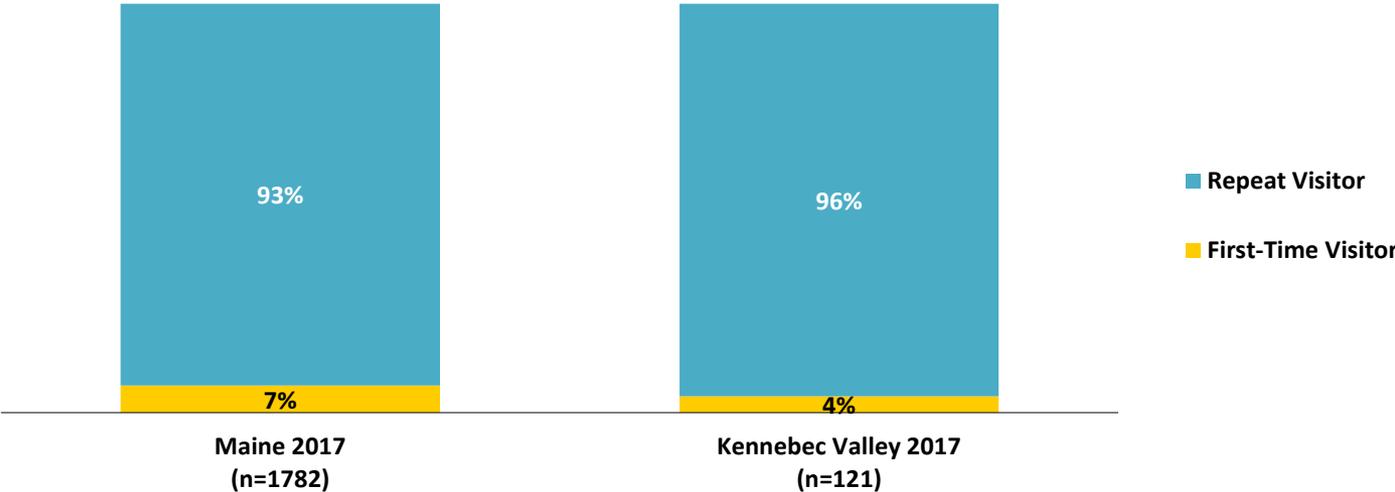
Q2. In what State or Province do you reside?

<> 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.

Over nine in ten day visitors to the Kennebec Valley region are repeat visitors.

Repeat vs. First-Time Visitors



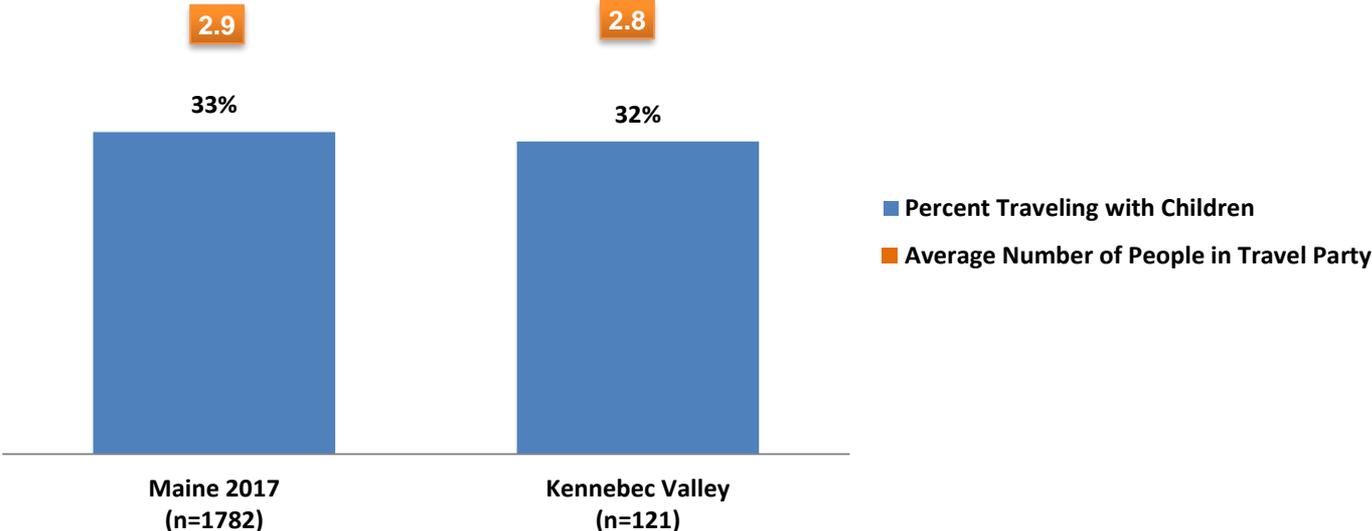
Q10. Was this your first trip to Maine?

<> 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 three day visitor travel parties to the Kennebec Valley region include children. The average visitor is traveling with two other people.

Travel Party Composition



Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q16. How many of these people were: Children

<> 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.

Day Visitors: Trip Experience

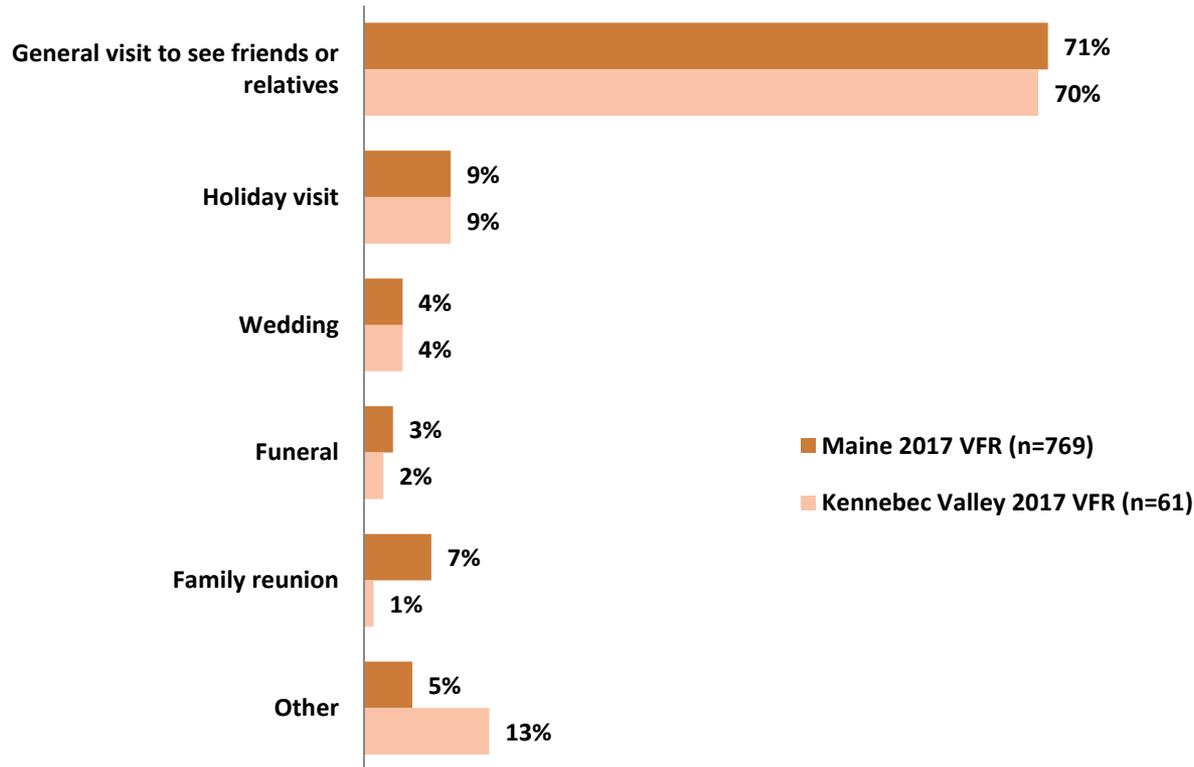
Sample Size Exclusions

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=10)
- Trip Activities: History/Culture (n=21)

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

Primary Purpose of Day VFR* Trips



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

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

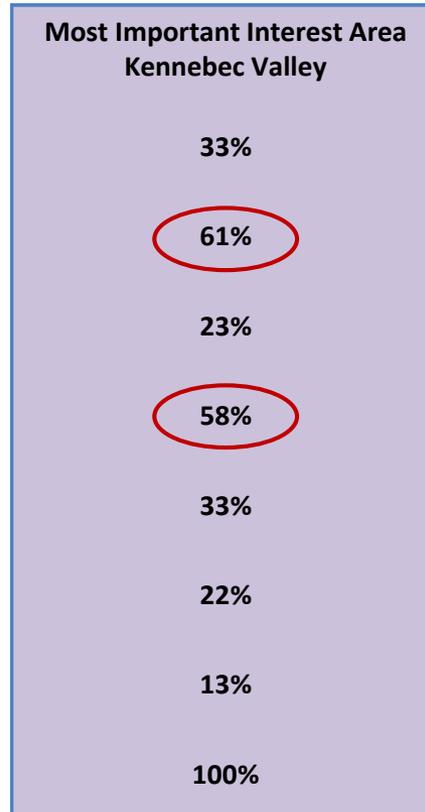
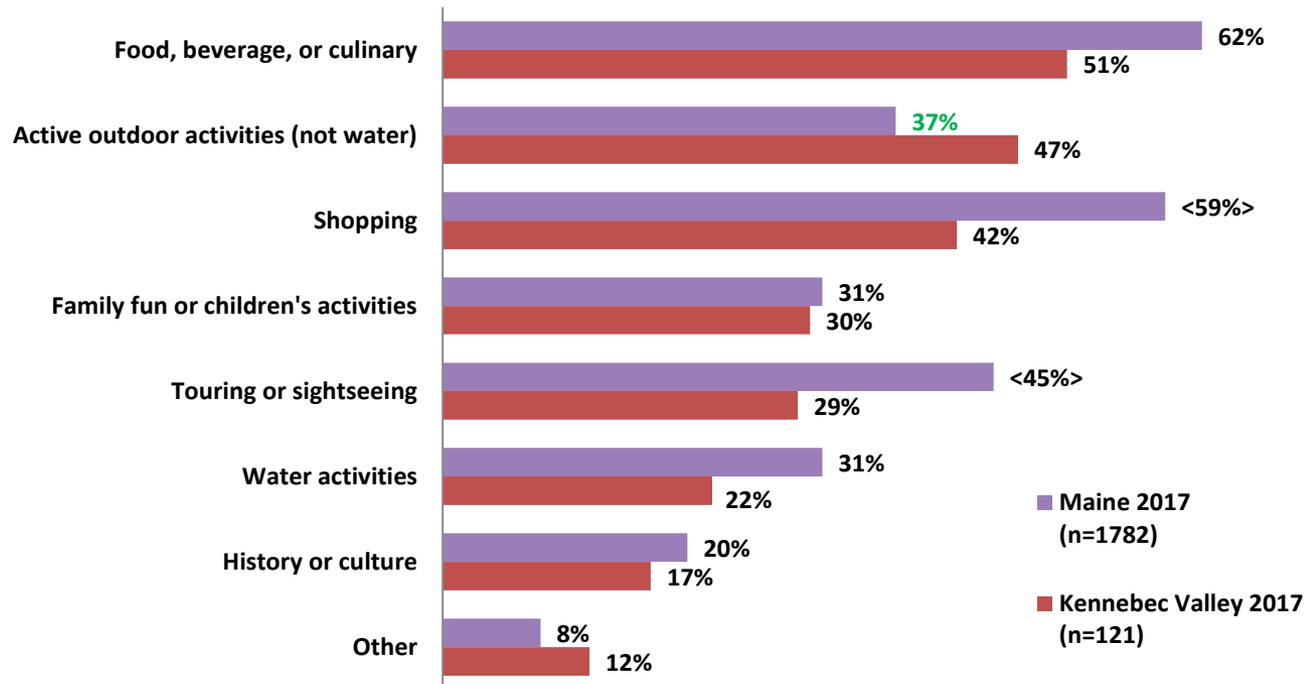
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

*VFR = Visiting Friends and Relatives

The most common interest areas pursued by day visitors to the Kennebec Valley are *food/beverage/culinary activities, active outdoor (non-aquatic) activities, and shopping.*

- *Shopping* and *touring/sightseeing* are less popular interests for Kennebec Valley day visitors, as compared to day visitors to the State overall.
- Three in five day visitors who selected *active outdoor (non-aquatic) activities* or *family fun/children's activities* as interest areas indicated that these were most important in their decision to visit.

2017 Interest Areas



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

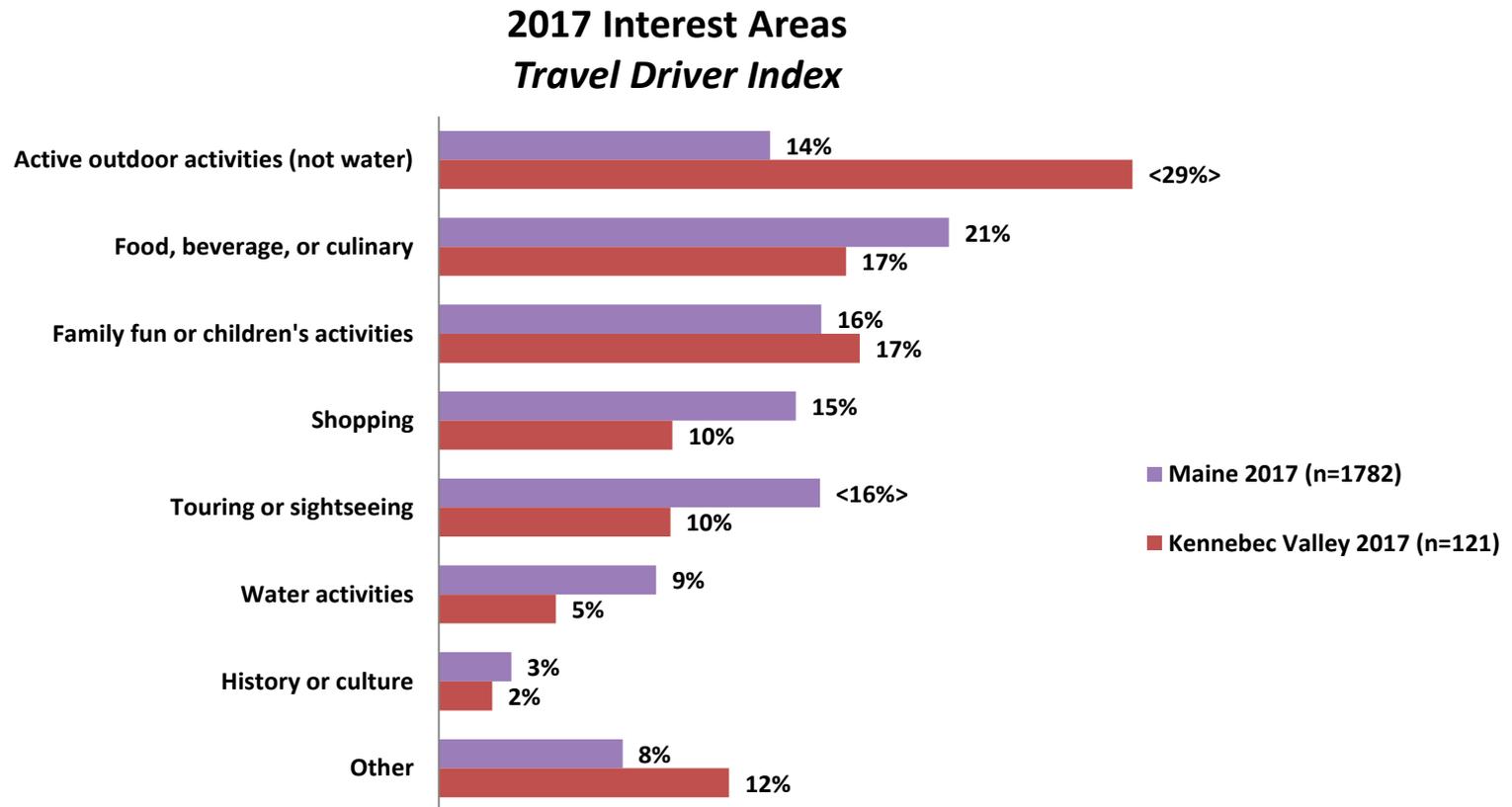
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 33

<> 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, *active outdoor (non-aquatic) activities* rank highest among day visitors to the Kennebec Valley region.

- Active outdoor (non-aquatic) activities are a stronger driver of day visitation to the Kennebec Valley region than to the State as a whole. *Touring/sightseeing activities*, on the other hand, are not as significant in terms of driving visitation to the region as compared to the rest of the State.

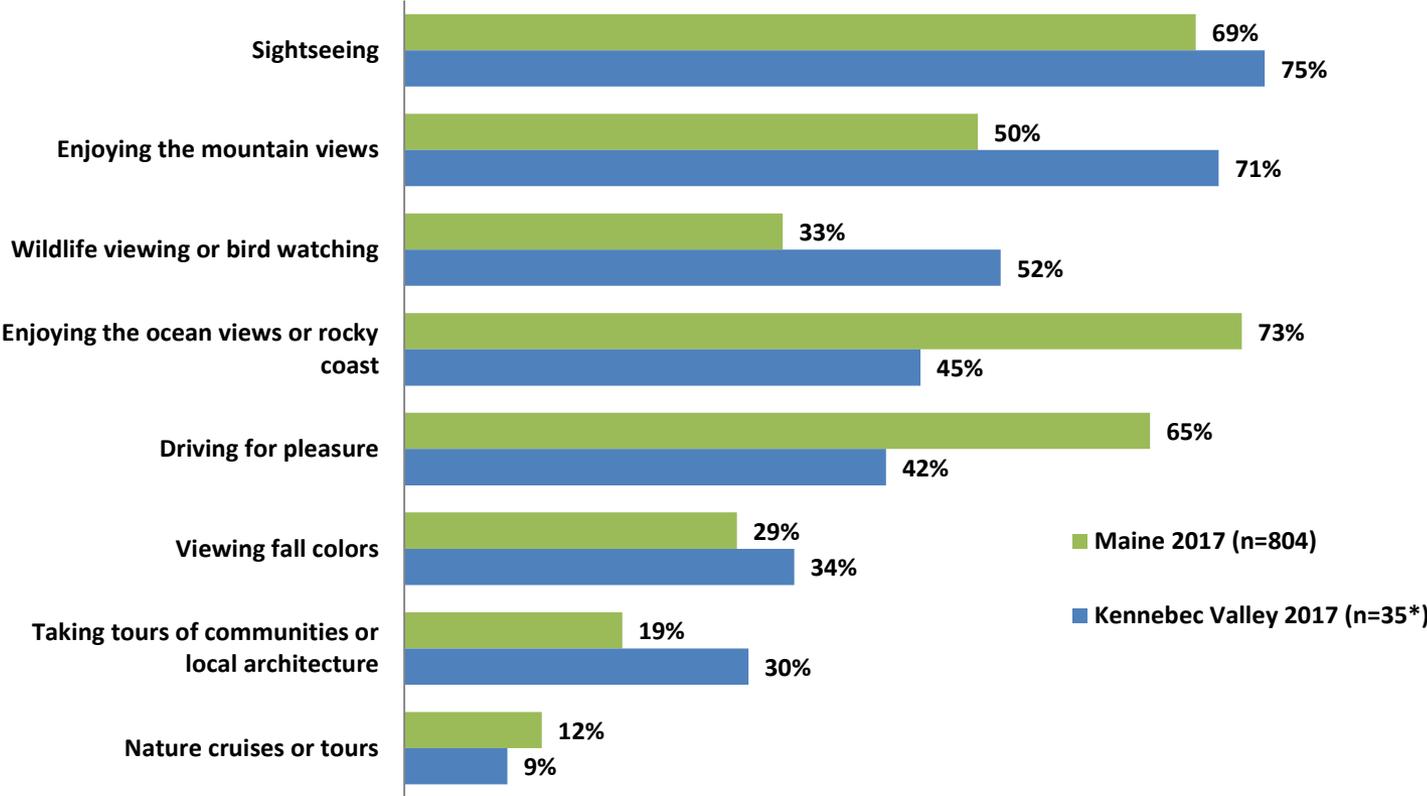


Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

Sightseeing and enjoying mountain views are the most common activities among day visitors to the Kennebec Valley who are interested in touring or sightseeing.

Touring or Sightseeing Activities

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



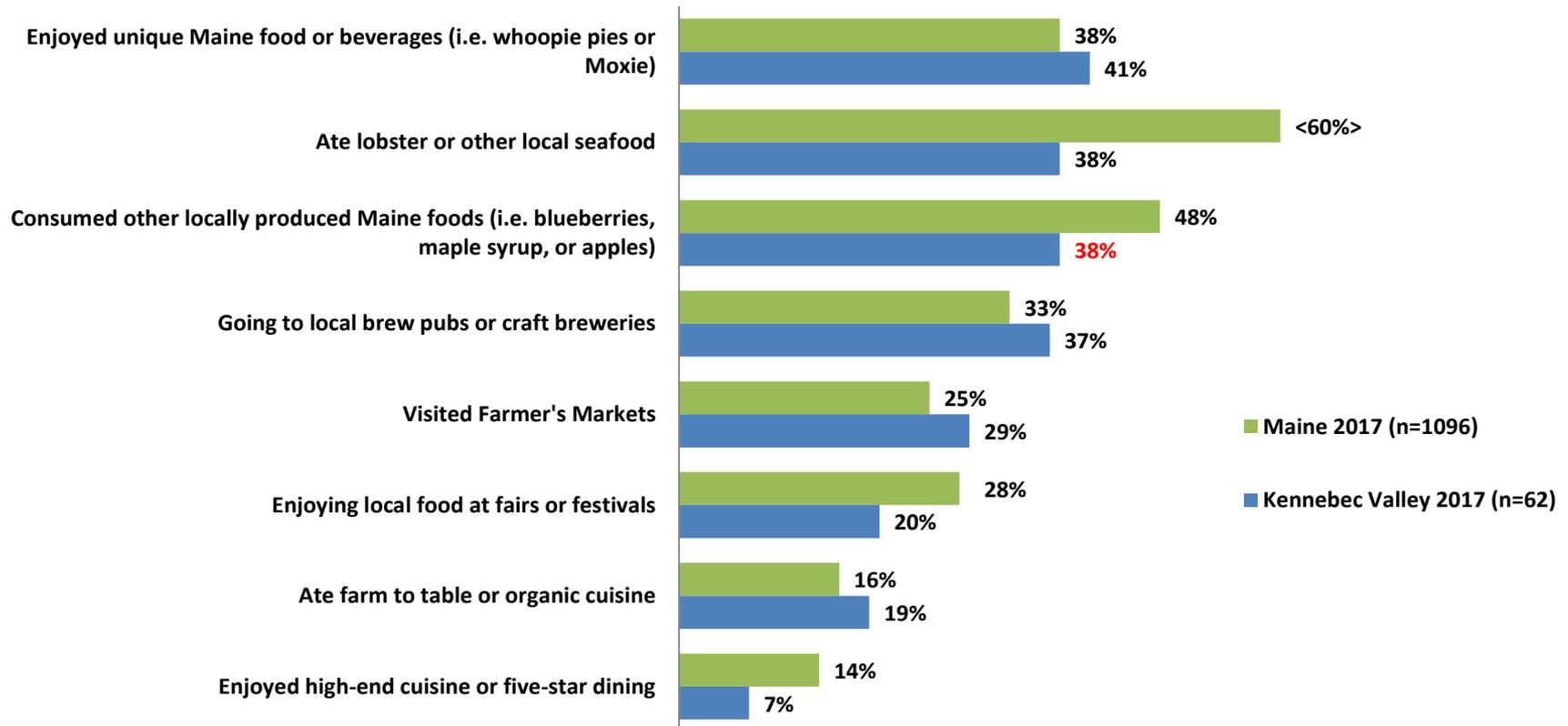
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.
**Please note small sample size. Use caution when interpreting results.*

Day visitors to the Kennebec Valley region who are interested in food/ beverage/culinary activities enjoy a variety of these activities while visiting.

- Kennebec Valley day visitors are less likely than day 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



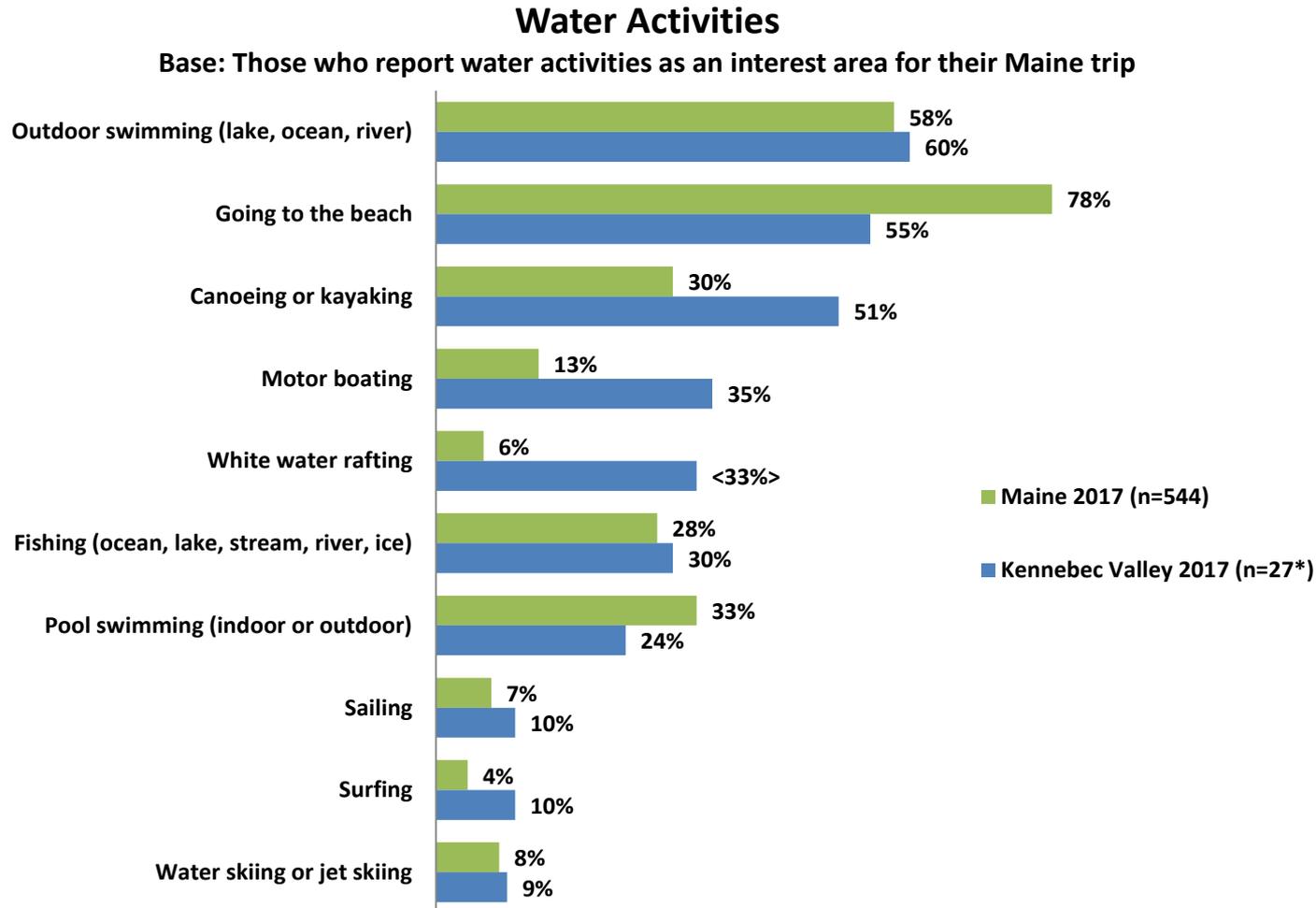
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

Outdoor swimming, going to the beach, and canoeing/kayaking are the most popular activities among Kennebec Valley day visitors interested in water activities.

- Kennebec Valley day visitors interested in water activities are more likely to go *white water rafting* as compared to day visitors to the State as a whole.



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.

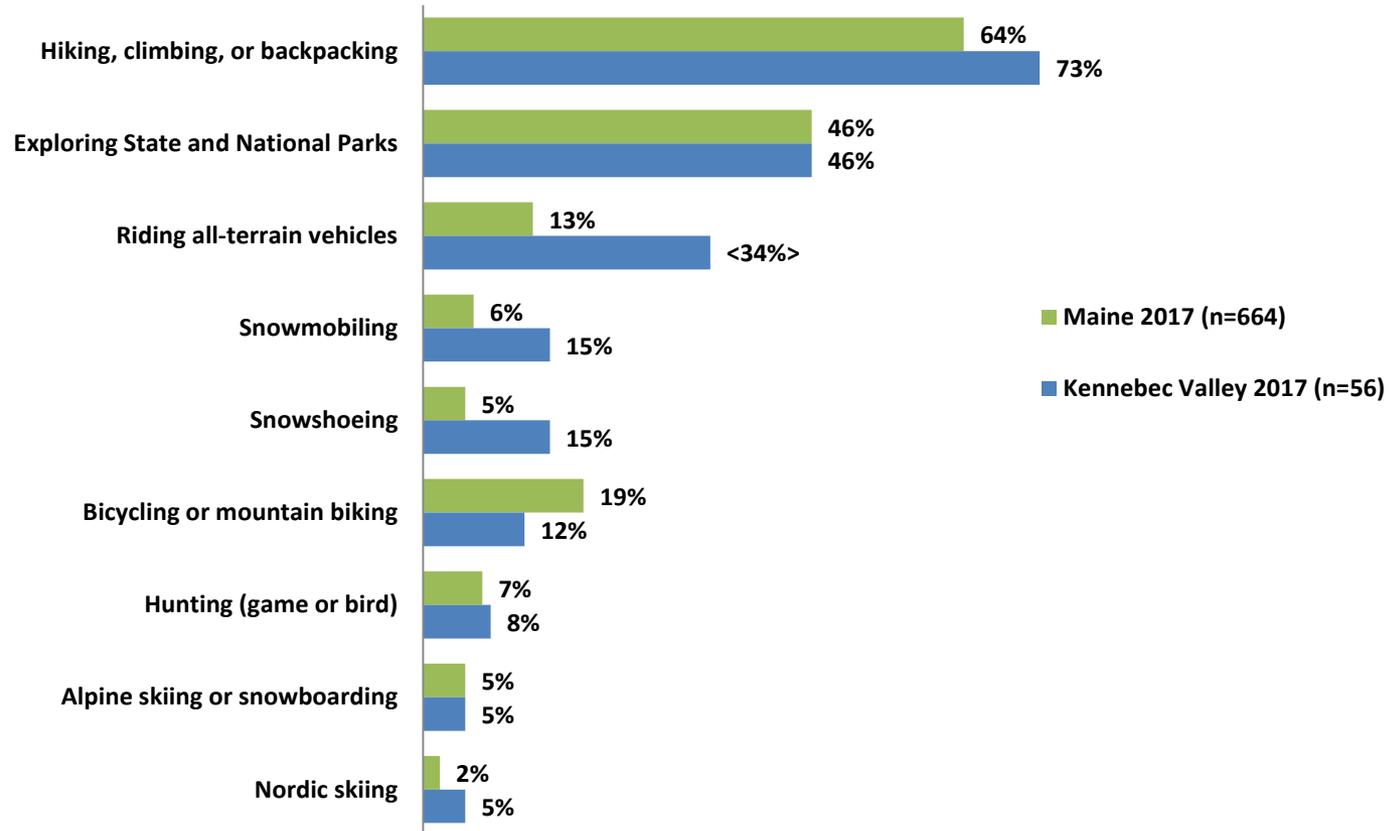
**Please note small sample size. Use caution when interpreting results.*

Three-fourths of day visitors interested in non-aquatic active outdoor activities *hike, climb, or backpack* while in this region.

- *Riding all-terrain vehicles* is more popular among day visitors to the Kennebec Valley region than among day visitors to the State as a whole.

Active Outdoor Activities – Non-Water

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



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

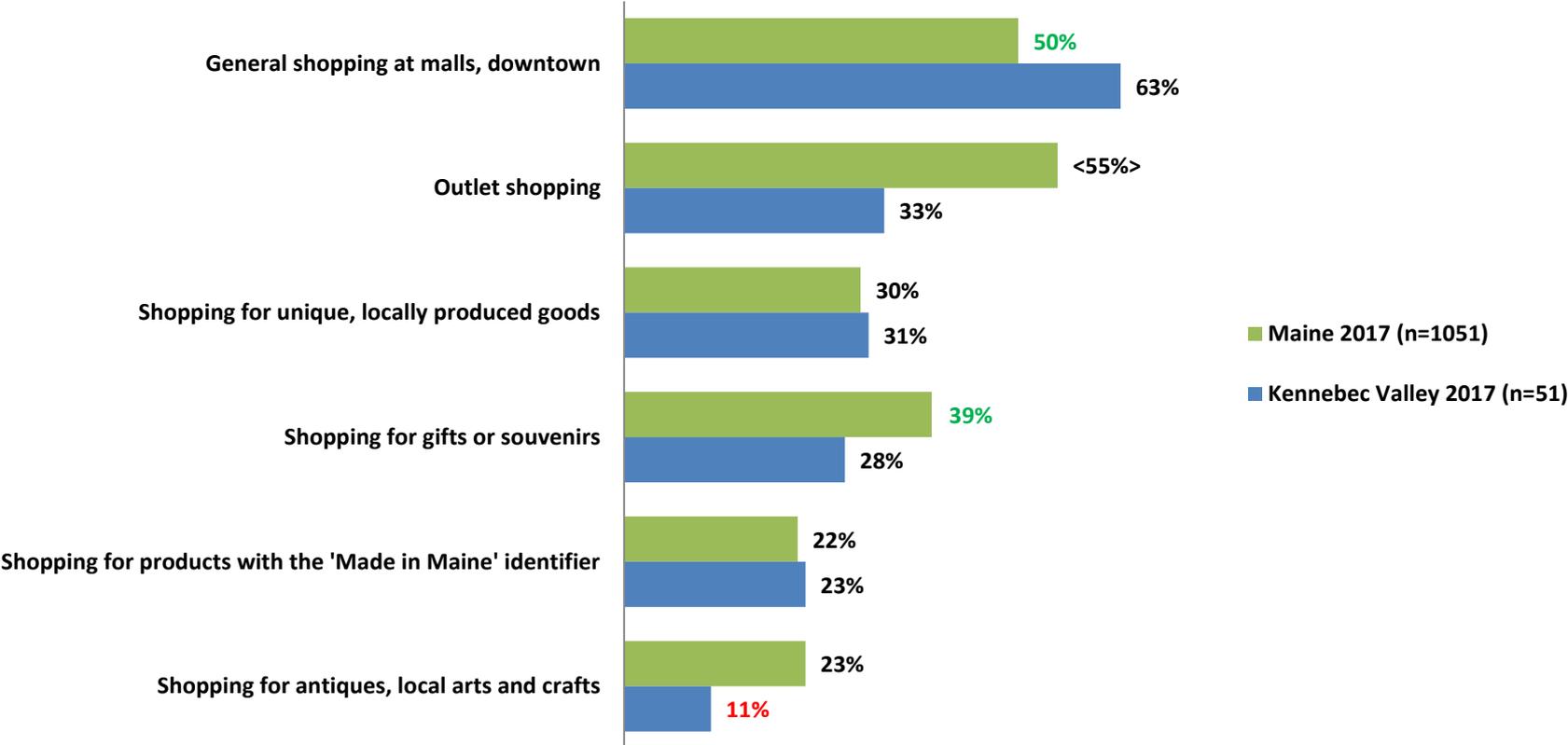
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

General shopping at malls/downtown is the most popular shopping activity among day visitors to the Kennebec Valley.

Shopping Activities

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



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

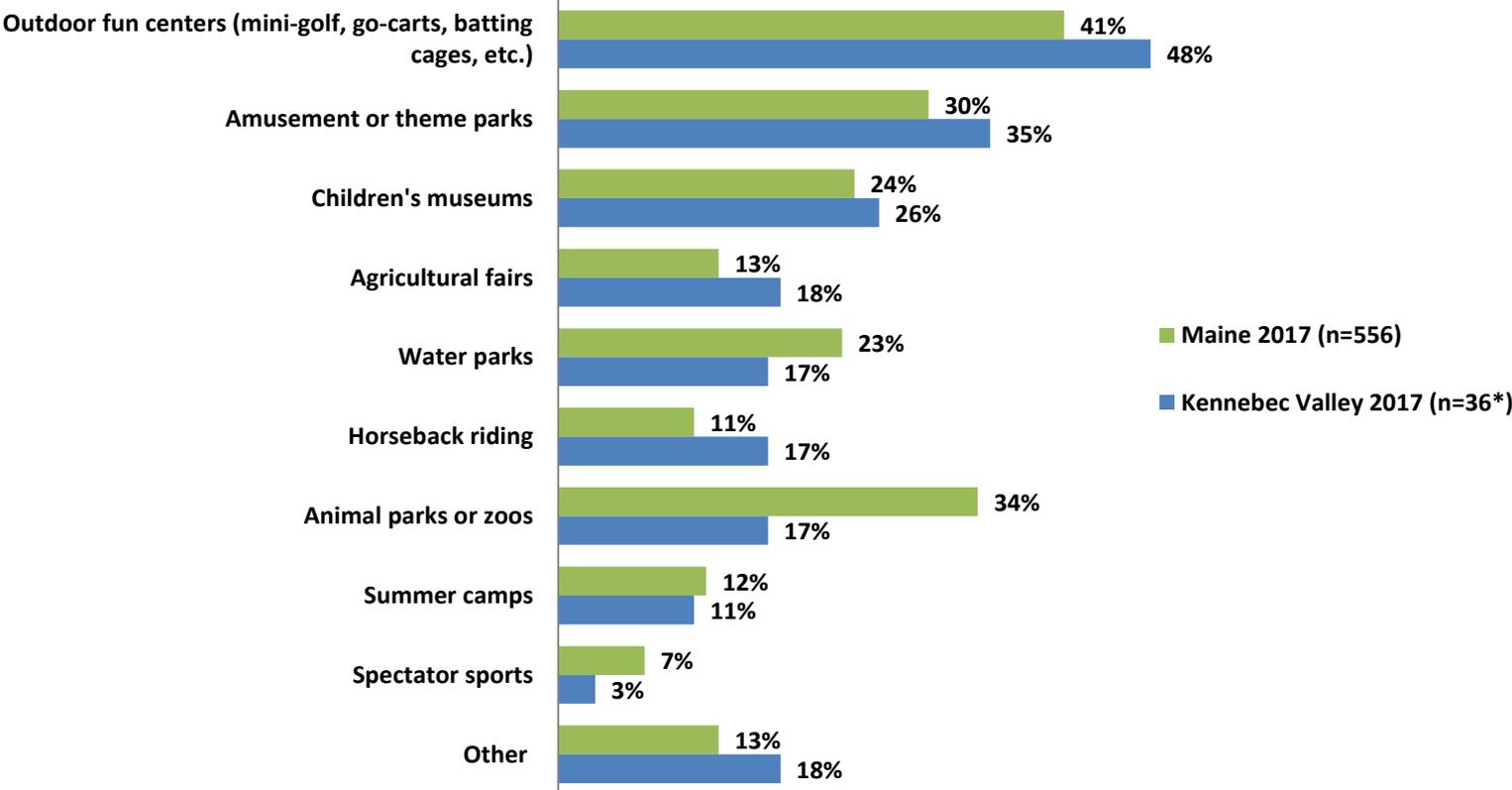
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Kennebec Valley day visitors interested in family fun/children’s activities are most likely to visit *outdoor fun centers* while in the area.

Family Fun/Children’s Activities

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



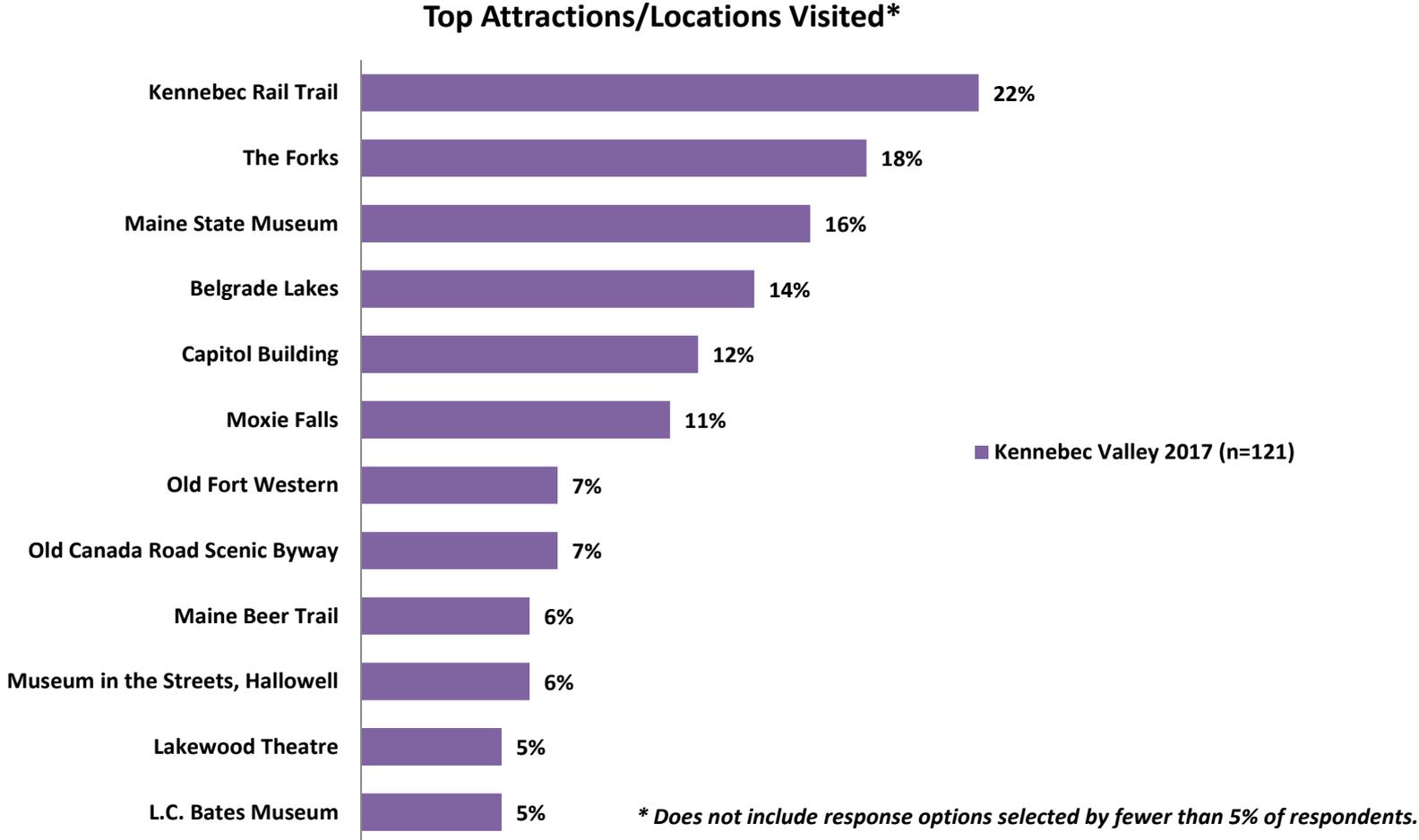
Q20. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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.

One in five day visitors to the Kennebec Valley region visit the Kennebec Rail Trail or The Forks.



Q24: Within the region you visited, what specific towns or cities did you visit? 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.

Comparison of Kennebec Valley Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Kennebec Valley tourism region and visitors to the State of Maine as a whole differ in a number of ways. These variations can be seen in:
 - Visitor demographics,
 - Visitor origin,
 - Reasons for traveling, and
 - The activities they participate in while visiting.
- Popular trip activities and stated travel interest areas closely follow the outdoor and nature-oriented environment available in the Kennebec Valley region.
- Highlights of these differences are shown on the following pages.

Visitor Origin

Compared to visitors to the State overall, Kennebec Valley visitors differ in the following ways:

DAY VISITORS

A **greater** proportion of visitors from **Maine**

A **lower** proportion of visitors from **New Hampshire**

Visitor Origin

OVERNIGHT VISITORS

A **greater** proportion of visitors
from **Maine**

A **lower** proportion of visitors
from **Massachusetts**

Visitor Demographics and Travel Intent

OVERNIGHT VISITORS



More likely to indicate plans to visit again in next two years

DAY VISITORS



Lower annual household incomes

Trip Interest Areas

OVERNIGHT VISITORS



Less likely to pursue:
Touring/sightseeing
activities
Food/beverage/culinary
activities

DAY VISITORS



Less likely to pursue:
Shopping
Touring/sightseeing
activities

Trip Interests and Importance (Travel Driver Index)

OVERNIGHT VISITORS

More likely to place importance
on **water activities**

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

Trip Interests and Importance (Travel Driver Index)

DAY VISITORS

**More likely to place importance
on active outdoor activities**

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

OVERNIGHT VISITORS

Less likely to be:

Shopping for **unique, locally produced** goods

Eating lobster or other local seafood

Consuming other locally produced Maine foods

Going to the **beach**

Exploring **State and National Parks**

Shopping for gifts/souvenirs

Trip Activities

DAY VISITORS

More likely to be:
White water rafting
Riding all-terrain vehicles

Less likely to be:
**Eating lobster or other local
seafood**
Outlet shopping



Digital **Research** Group
DRI | CRITICAL **INSIGHTS** | dpa

Davidson-Peterson Associates
172 Commercial Street
Portland, ME 04101
207.985.7660
www.digitalresearch.com