

Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report



Maine Woods Area Special Report



Prepared by



June 2017

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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 the State of Maine's visitor tracking research.

Research Objectives	Survey Instruments		
	National Omnibus	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 devoted to 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 to/in Maine greater than 50 miles from home in the last four weeks
- Surveyed monthly

Research Objectives and Methodology

- Survey results were collected during calendar year 2016, for travel to Maine occurring from December 2015 through November 2016. The number of respondents participating in each survey statewide is:

Research Component	2016 Completed Surveys
Overnight Visitor Survey	2,909
Day Visitor Survey	1,762
National Travel Survey	21,910

Research Objectives and Methodology

- The following report summarizes results among visitors to the **Maine Woods Area** during 2016, an area made up of five of Maine's tourism regions:
 - Maine Lakes & Mountains,
 - Kennebec Valley,
 - The Maine Highlands,
 - Aroostook County, and
 - Washington County (a portion of the Downeast & Acadia region).
- In total, **1307 overnight visitors** and **577 day visitors** to the Maine Woods Area were surveyed.
- Throughout this report, data for the **Maine Woods Area** will be presented alongside data for the State of Maine as a whole. Statistically significant differences between the Maine Woods Area 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 2015 and 2016 are also highlighted for both the Maine Woods Area 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 Woods Area are 40 years old, on average, and have annual household incomes of around \$99,000. About two-thirds have a college degree, or are employed full-time.

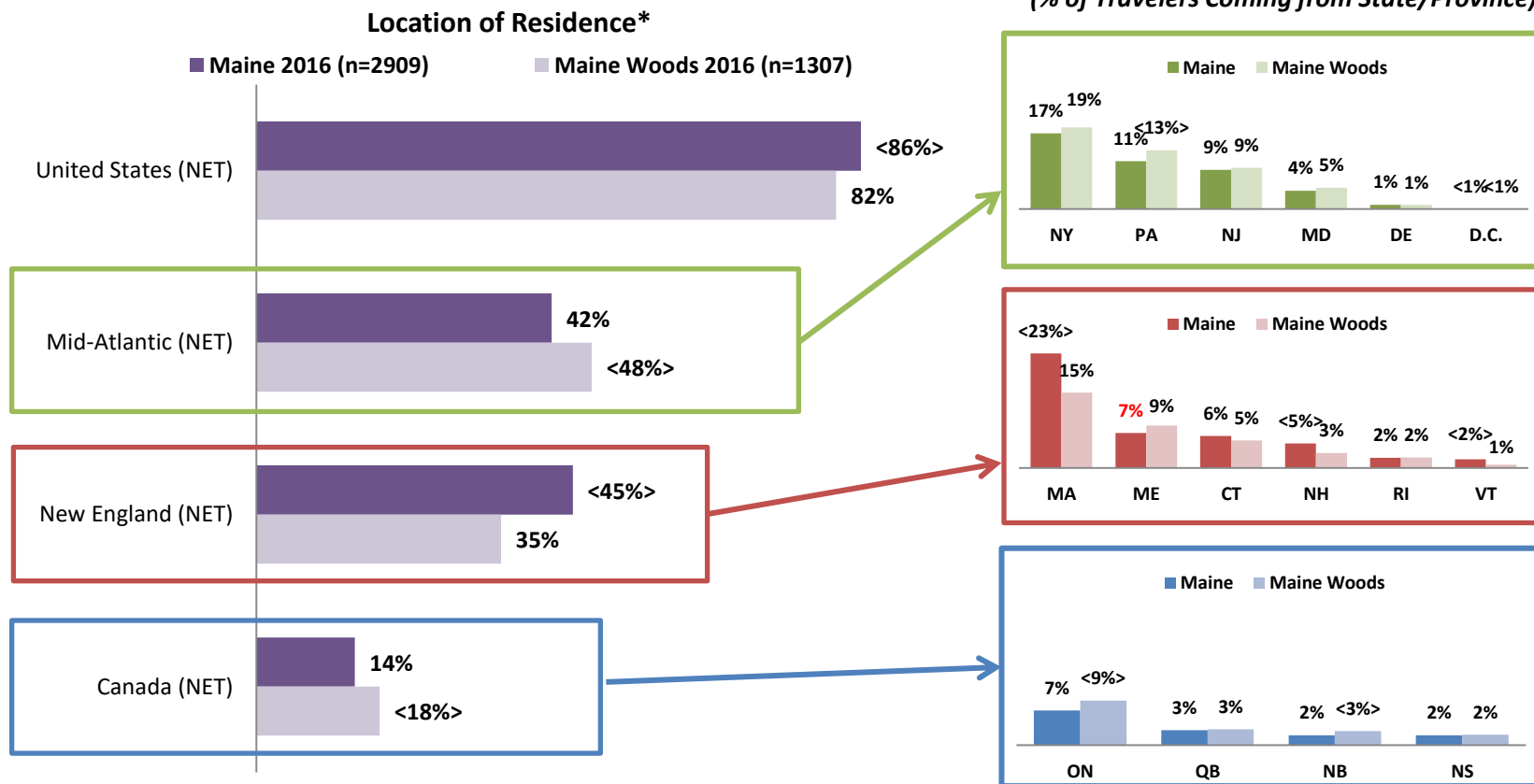
Overnight Visitors	Maine 2016 (n=2909)	Maine Woods 2016 (n=1307)
Age:		
< 35	34%	<41%>
35 - 44	22%	<25%>
45 - 54	<18%>	16%
55 +	<26%>	19%
Mean Age (Years)	<42.8>	39.9
Income:		
< \$50,000	20%	20%
\$50,000 - \$99,999	42%	41%
\$100,000 +	39%	39%
Mean Income	\$98,700	\$99,100
Female	<60%>	56%
College Degree or Higher	66%	64%
Married	56%	55%
Employed Full-Time	66%	<69%>

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

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

Half of overnight visitors to the Maine Woods Area are from the Mid-Atlantic region of the United States.

- A greater proportion of overnight visitors to the Maine Woods Area originate from the Mid-Atlantic region or Canada, as compared to overnight visitors to the State of Maine overall.
- Overnight visitors to this region are more likely than visitors to the State as a whole to arrive from Pennsylvania or Ontario, 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.

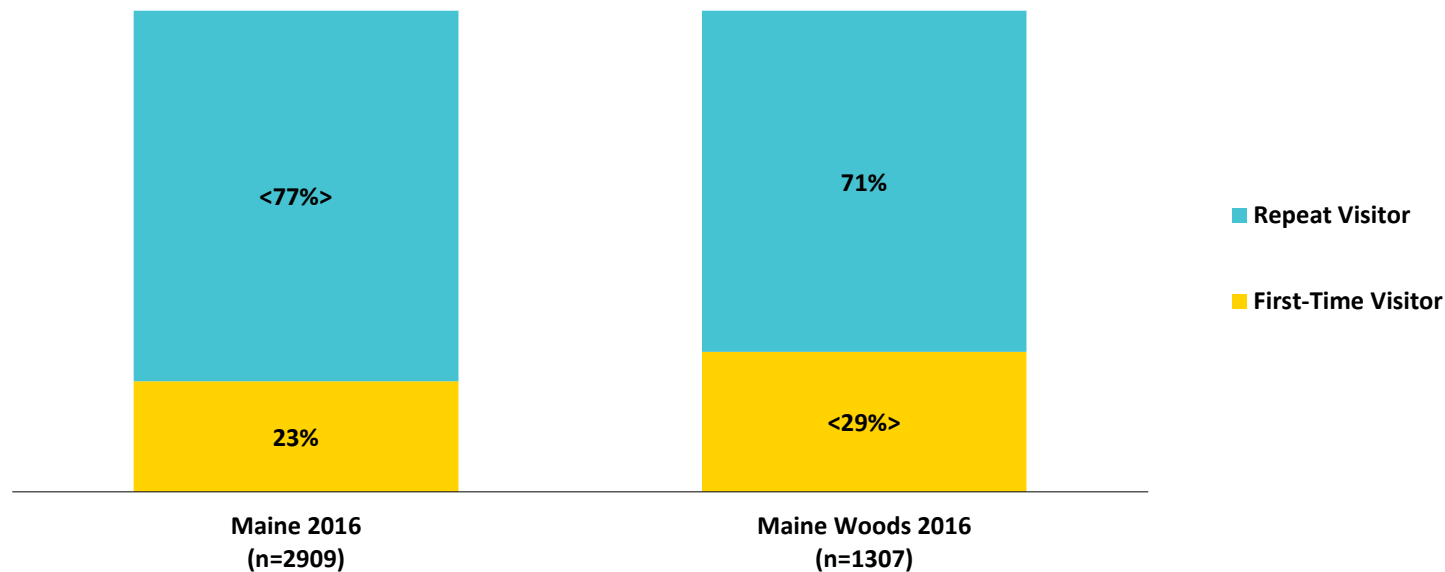
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Three in ten overnight visitors to the Maine Woods are visiting for the first time.

- The Maine Woods Area attracts a greater proportion of first-time visitors as compared to the State as a whole.

Repeat vs. First-Time Visitors

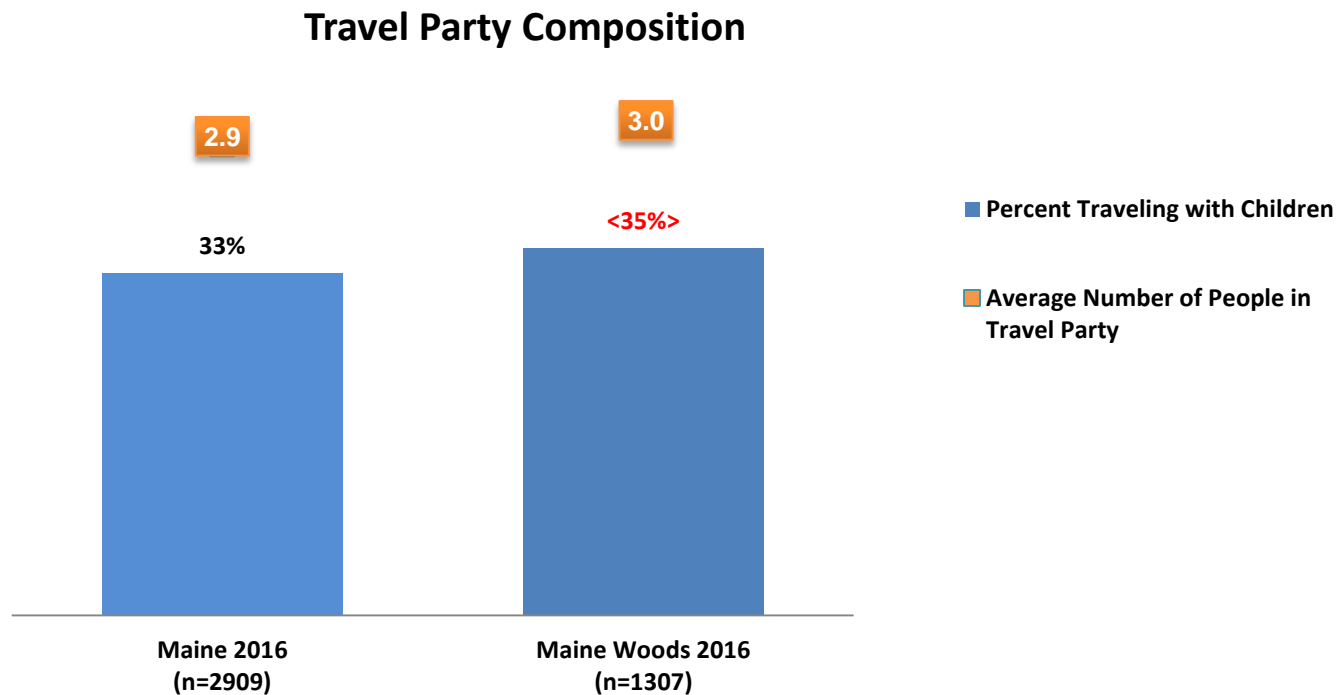


Q11. Was this your first visit in Maine?

<> 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.

One-third of overnight visitors to the Maine Woods Area are traveling with children.



Q21. Including yourself, how many people (adults and children) were in your immediate travel party on this specific trip to Maine?

Q22. How many of these people were: Children?

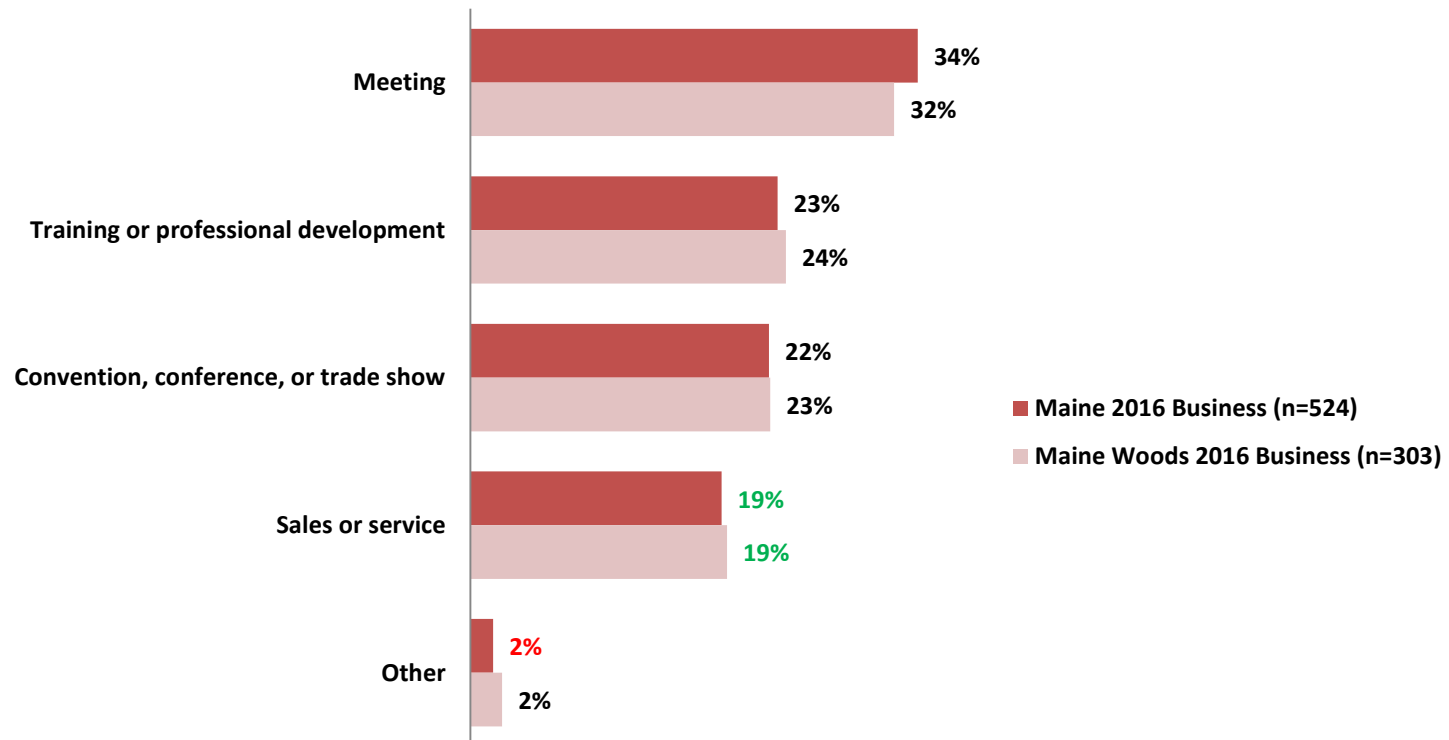
<> indicates a significant difference between subgroups at the 95% confidence level.

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

One-third of overnight business travelers to the Maine Woods are attending a *meeting*.

Primary Purpose of Overnight Business Trips



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

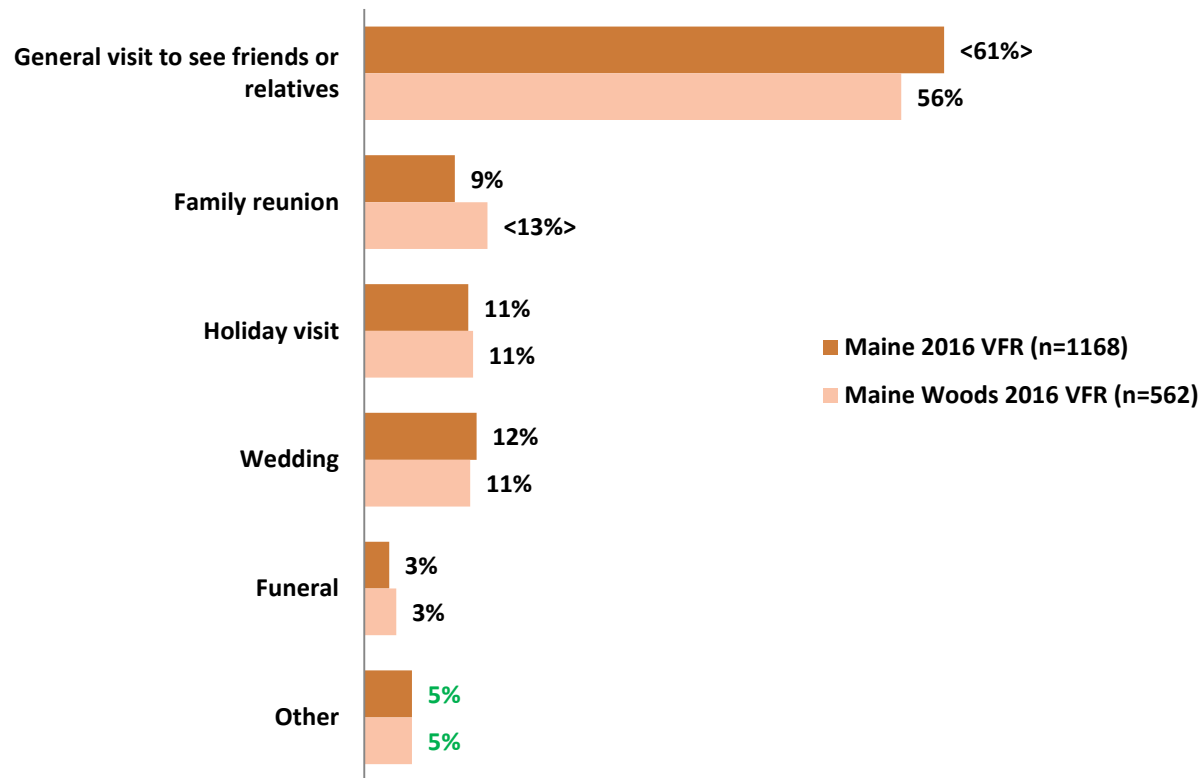
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The majority of overnight VFR visitors cite a *general visit to see friends/relatives* as their reason for visiting the Maine Woods region.

- Maine Woods overnight visitors who are in the state primarily to visit friends or relatives are more likely to be visiting for a *family reunion* than are visitors to the State as a whole. In contrast, these visitors are less likely to be in Maine for a *general visit to see friends or relatives* as compared to visitors to the State as a whole.

Primary Purpose of Overnight VFR Trips



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

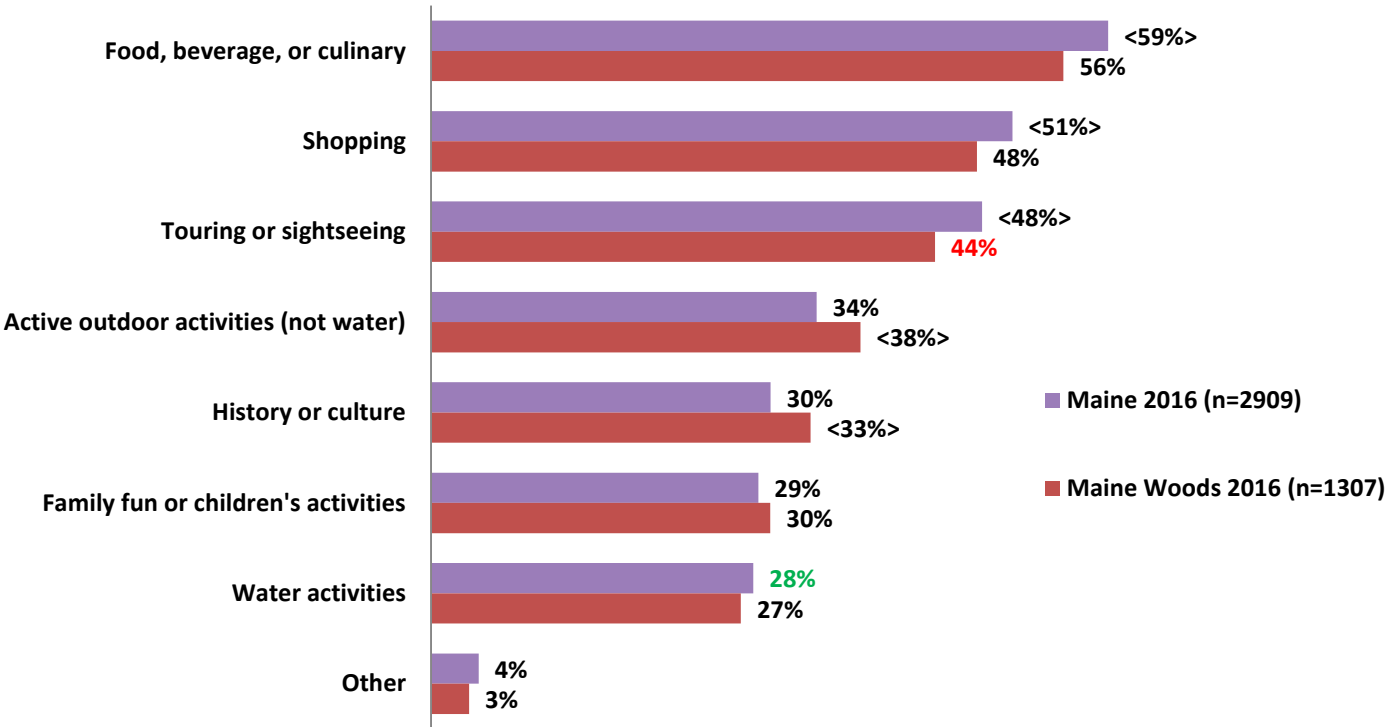
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The top interest area among overnight visitors to the Maine Woods includes *food/beverage/culinary activities*, followed by *shopping* and *touring/sightseeing*.

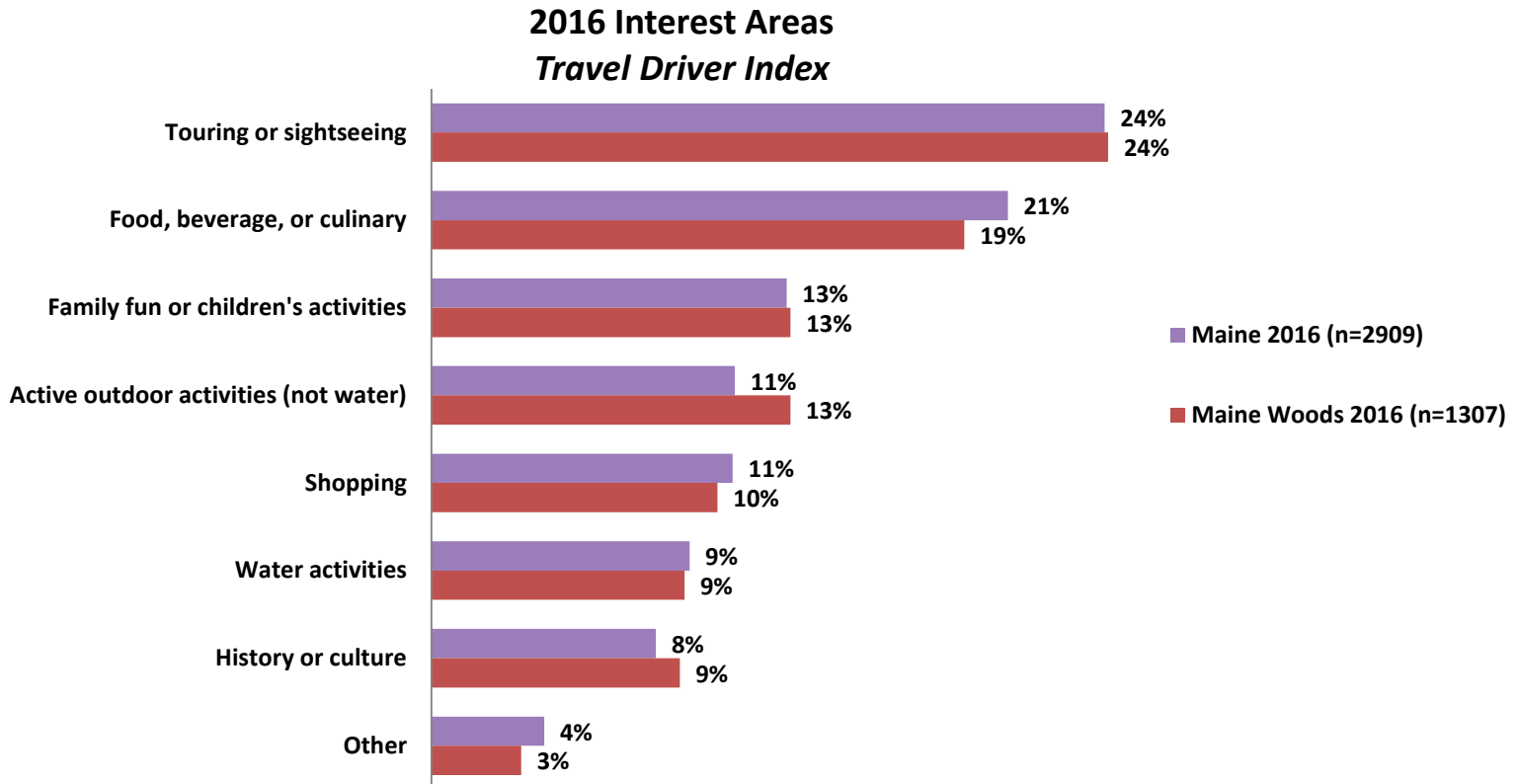
- These three top interest areas, however, are less popular among Maine Woods visitors than among visitors to Maine as a whole.
- Overnight visitors to the Maine Woods region are more likely than visitors to the State of Maine as a whole to be interested in *active outdoor activities* and *history/culture activities*.

2016 Interest Areas



Most Important Interest Area Maine Woods	
	34%
	21%
	55%
	34%
	27%
	43%
	33%
	96%

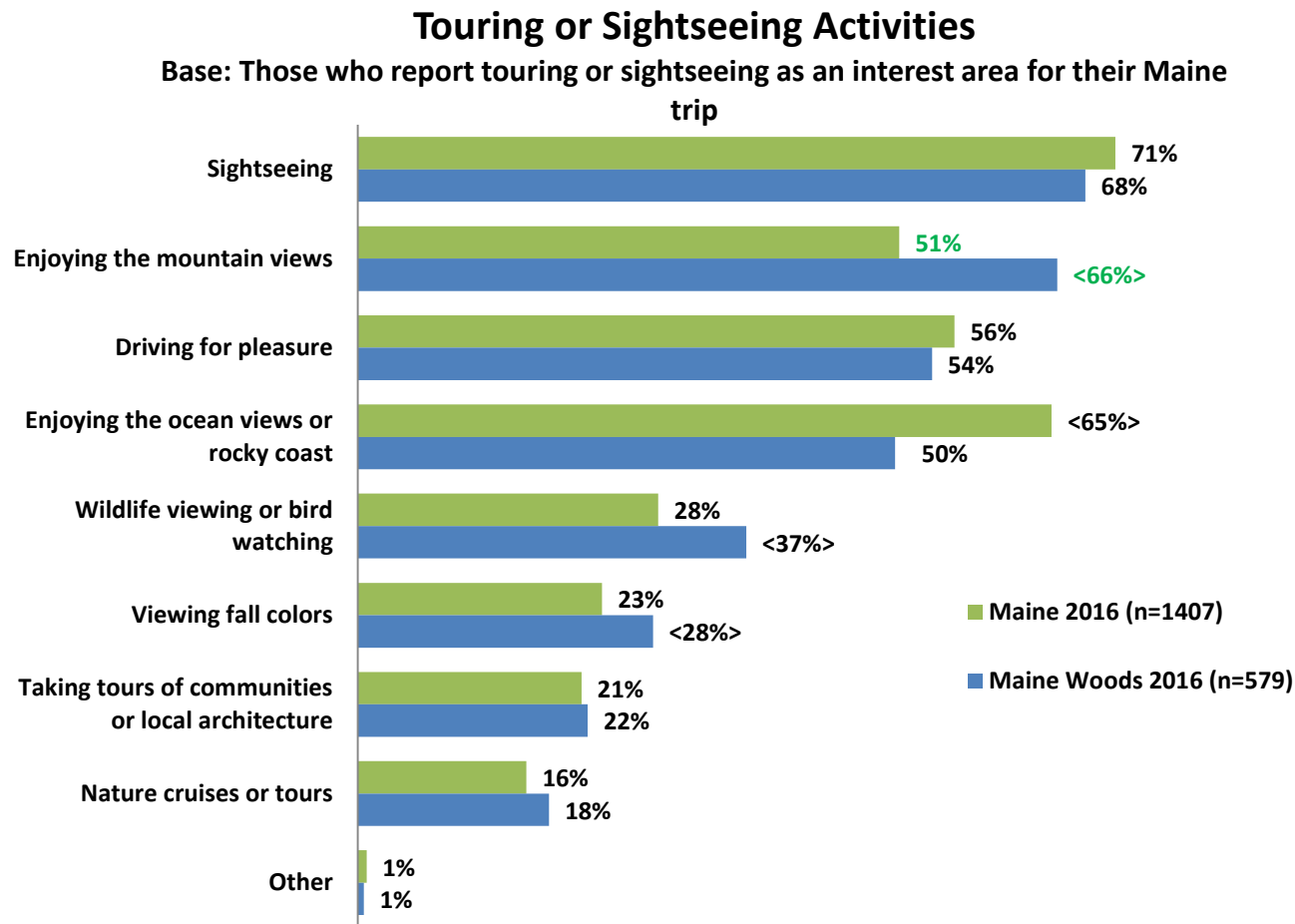
Overall, the primary driver of travel to the region is *touring/sightseeing*, followed by *food/beverage/culinary interests*.



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

Two-thirds of visitors interested in touring/sightseeing do some general sightseeing or enjoy the mountain views while visiting.

- Visitors to the Maine Woods are more likely than overnight visitors to Maine overall to *enjoy the mountain views, view wildlife or birds, and view fall colors*.



Q34. 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.

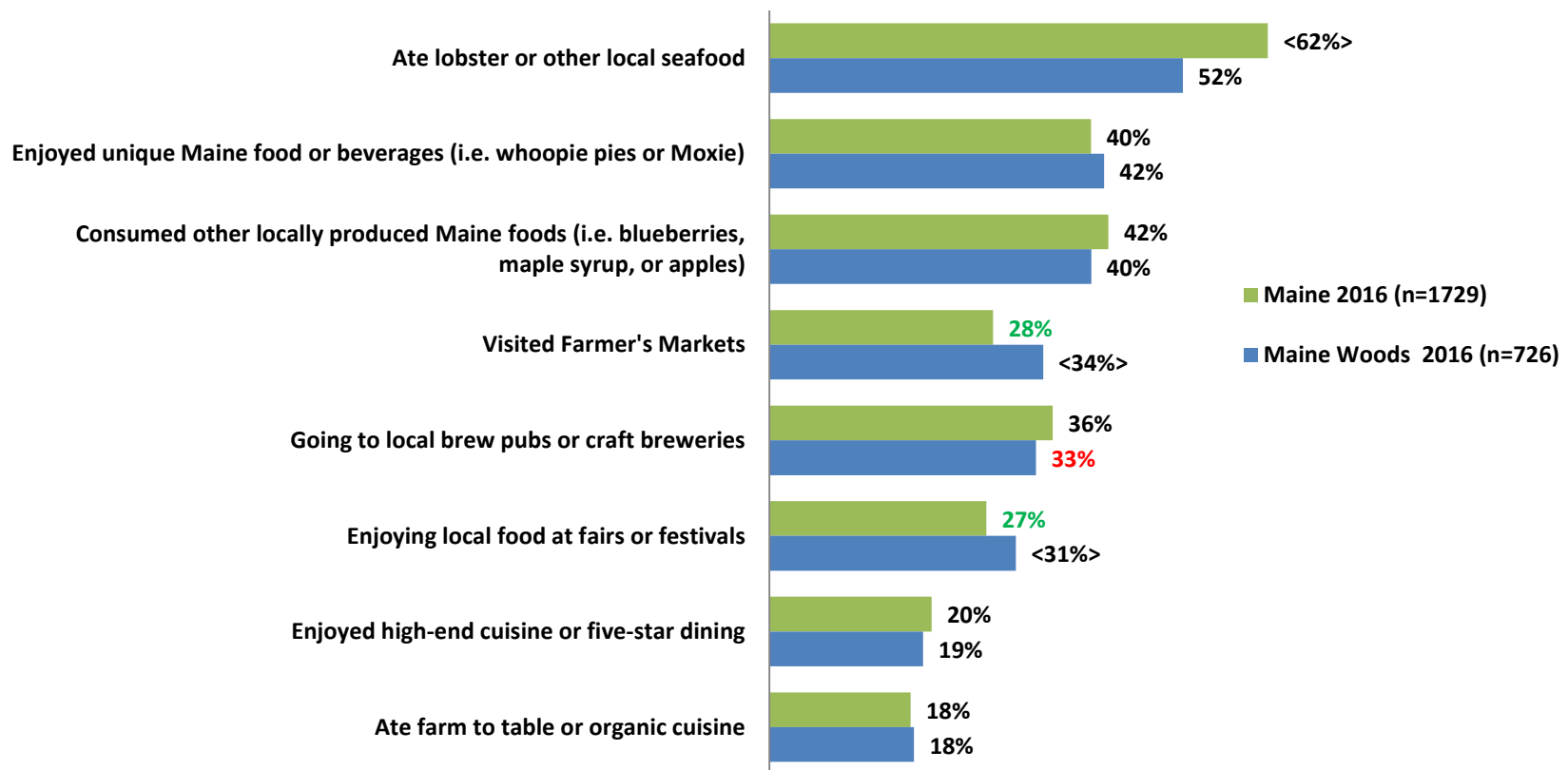
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Eating lobster/other local seafood is the most common activity among overnight visitors interested in food/beverage/culinary activities.

- Maine Woods visitors are less likely than visitors to the State of Maine as a whole to enjoy Maine's *lobster or seafood*.
- Overnight visitors to the Maine Woods region are more likely to visit *Farmer's Markets* or enjoy local food at fairs/festivals than are overnight visitors to Maine as a whole.

Food, Beverage, or Culinary Activities

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



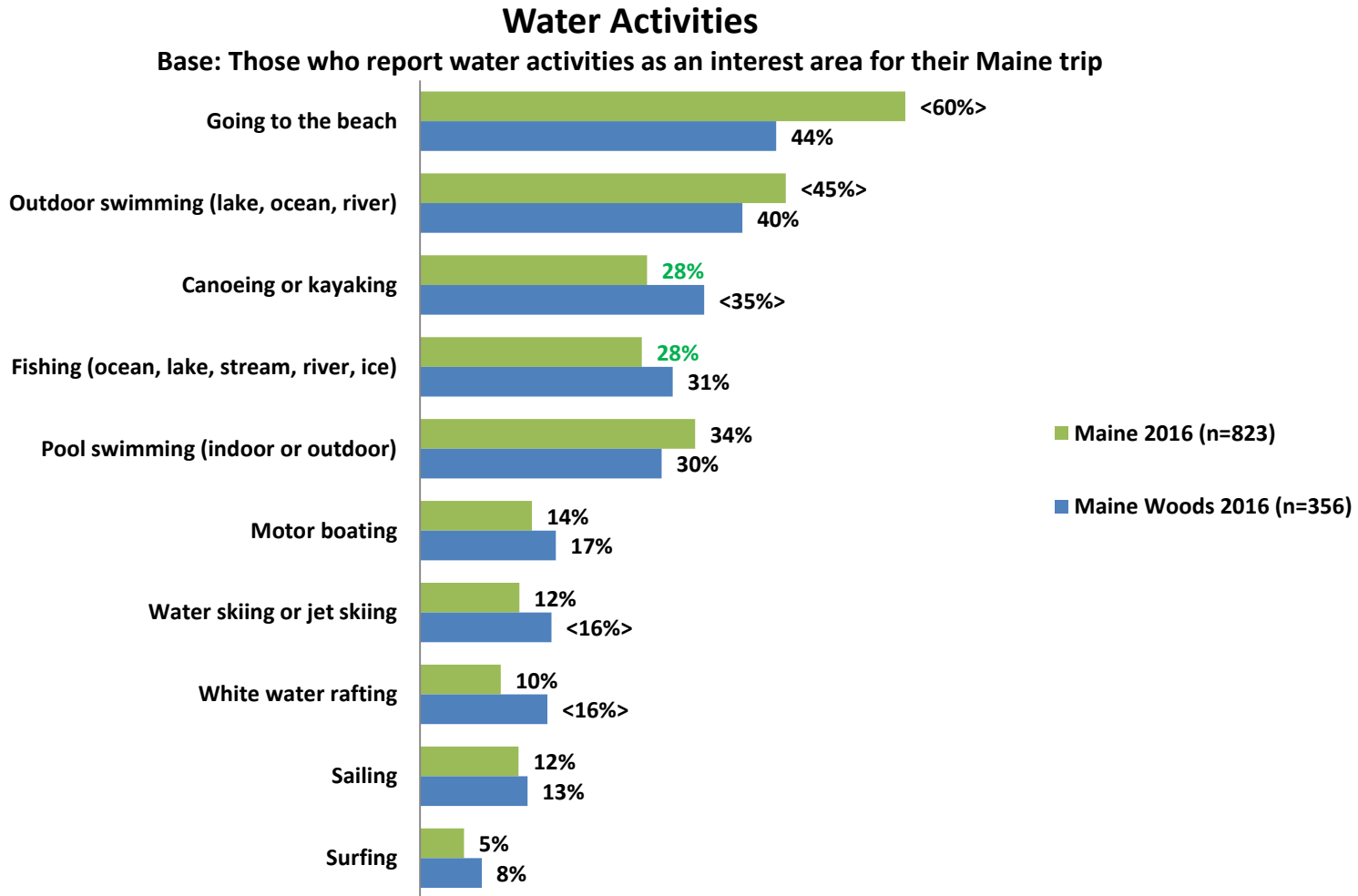
Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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Going to the beach and outdoor swimming are the most common water activities pursued by overnight visitors to the Maine Woods Area, though less so than among Maine visitors as a whole.

- Canoeing or kayaking, water skiing, and white water rafting are more popular among overnight visitors to the Maine Woods Area than among visitors to the State as a whole.



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

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

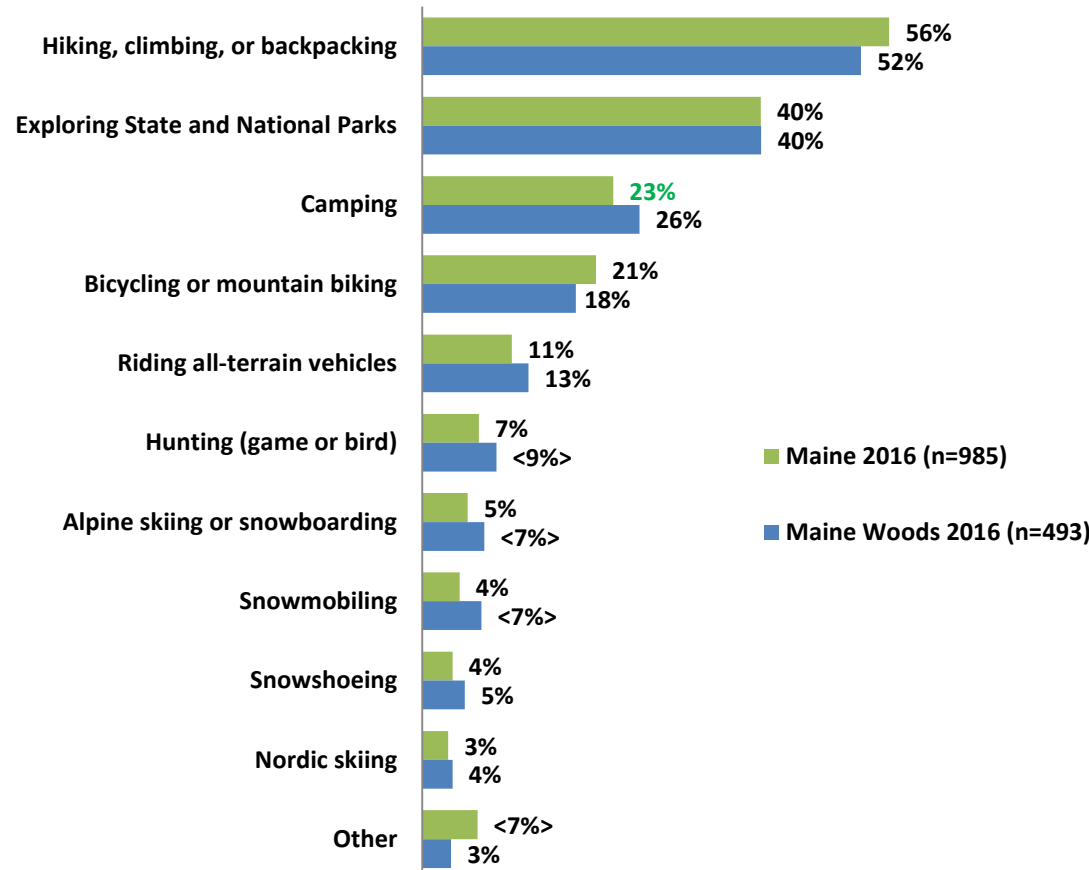
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common active outdoor activity among overnight visitors to the Maine Woods is *hiking/climbing/backpacking*, followed by *exploring State and National Parks*.

- *Hunting, skiing, and snowmobiling* are all more popular among overnight visitors to the Maine Woods Area than among 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



Q34. In which of the following activities did you participate during this trip? *Please check all that apply.*

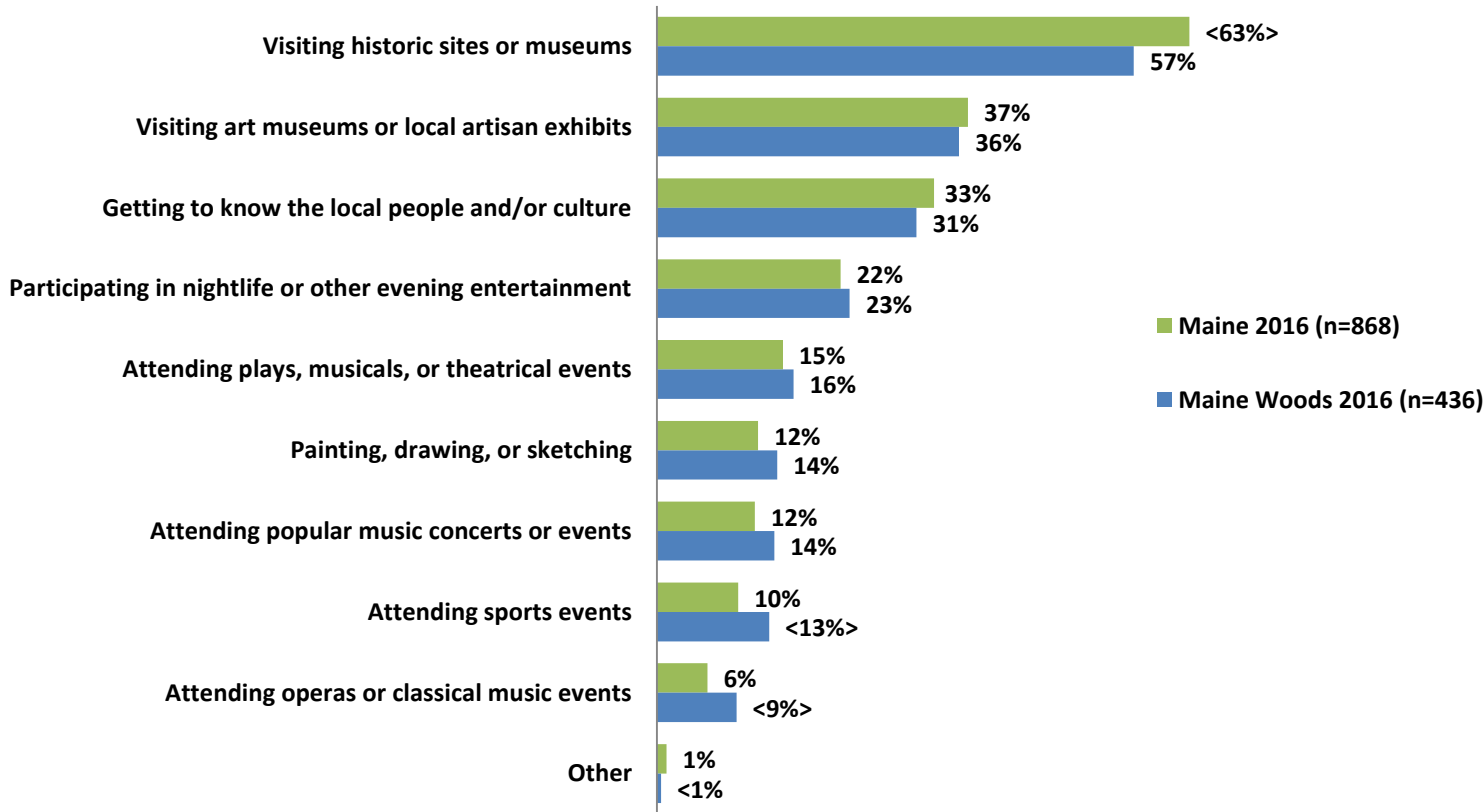
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Visiting historic sites/museums is the most popular activity among overnight visitors who are interested in history/culture, though less so than among 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

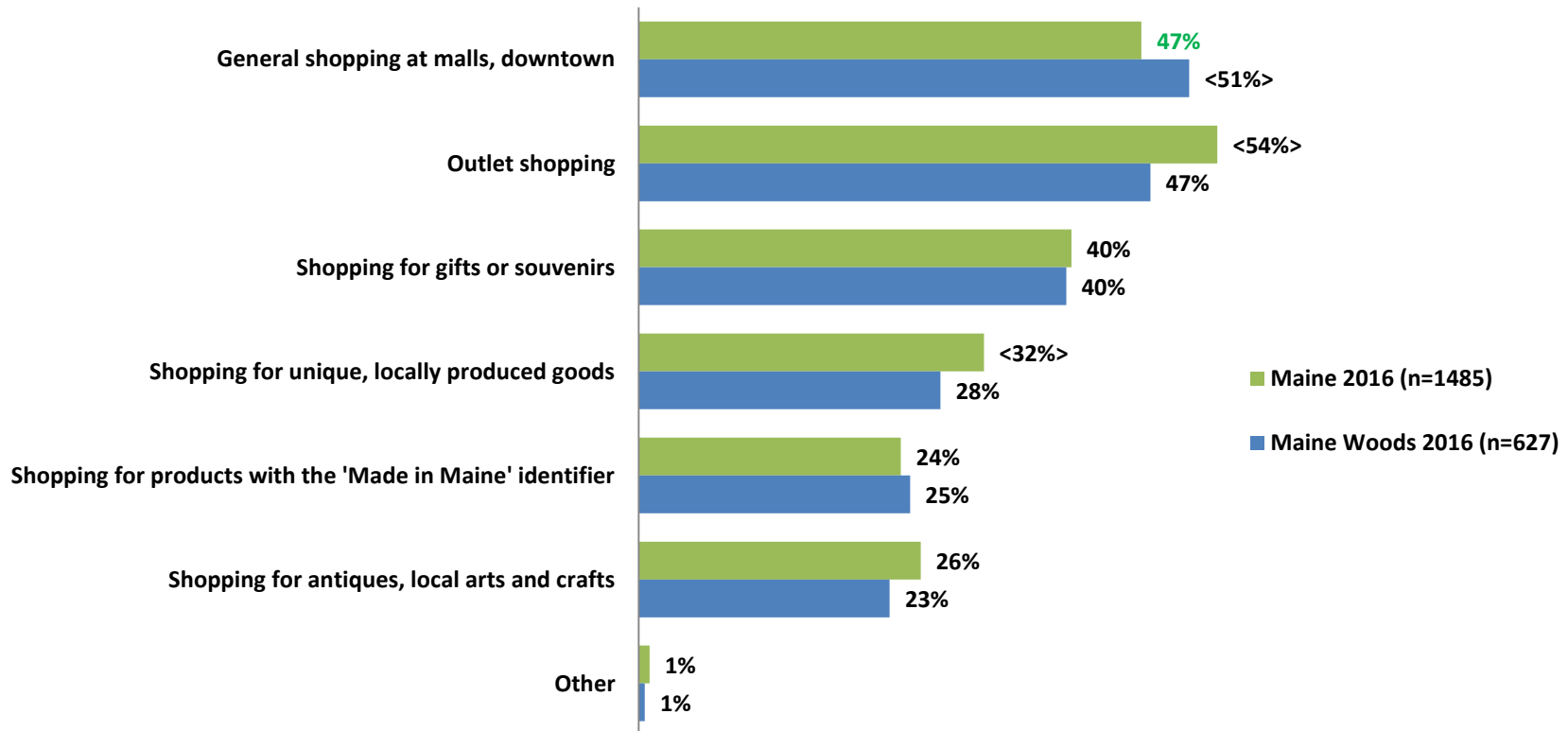


Overnight visitors to the Maine Woods who are interested in shopping engage in various shopping activities while visiting.

- General shopping at malls or downtown is more popular in the Maine Woods area compared to the State as a whole, while *outlet shopping* and *shopping for unique, locally produced goods* are less popular.

Shopping Activities

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



Q34. In which of the following activities did you participate during this trip? Please check all that apply.

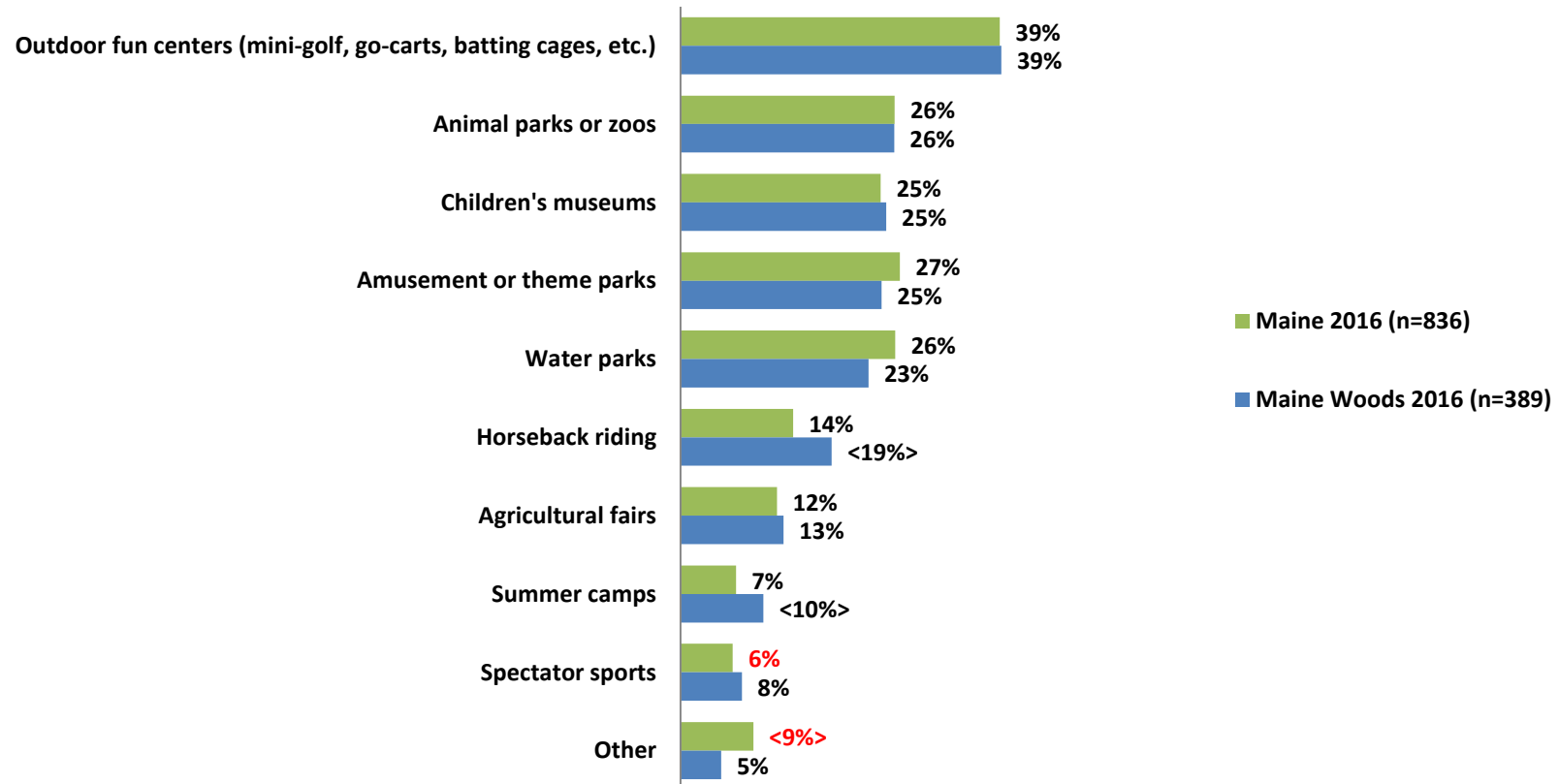
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Overnight visitors who are interested in family fun/children's activities participate in a wide variety of these activities while visiting.

Family Fun/Children's Activities

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

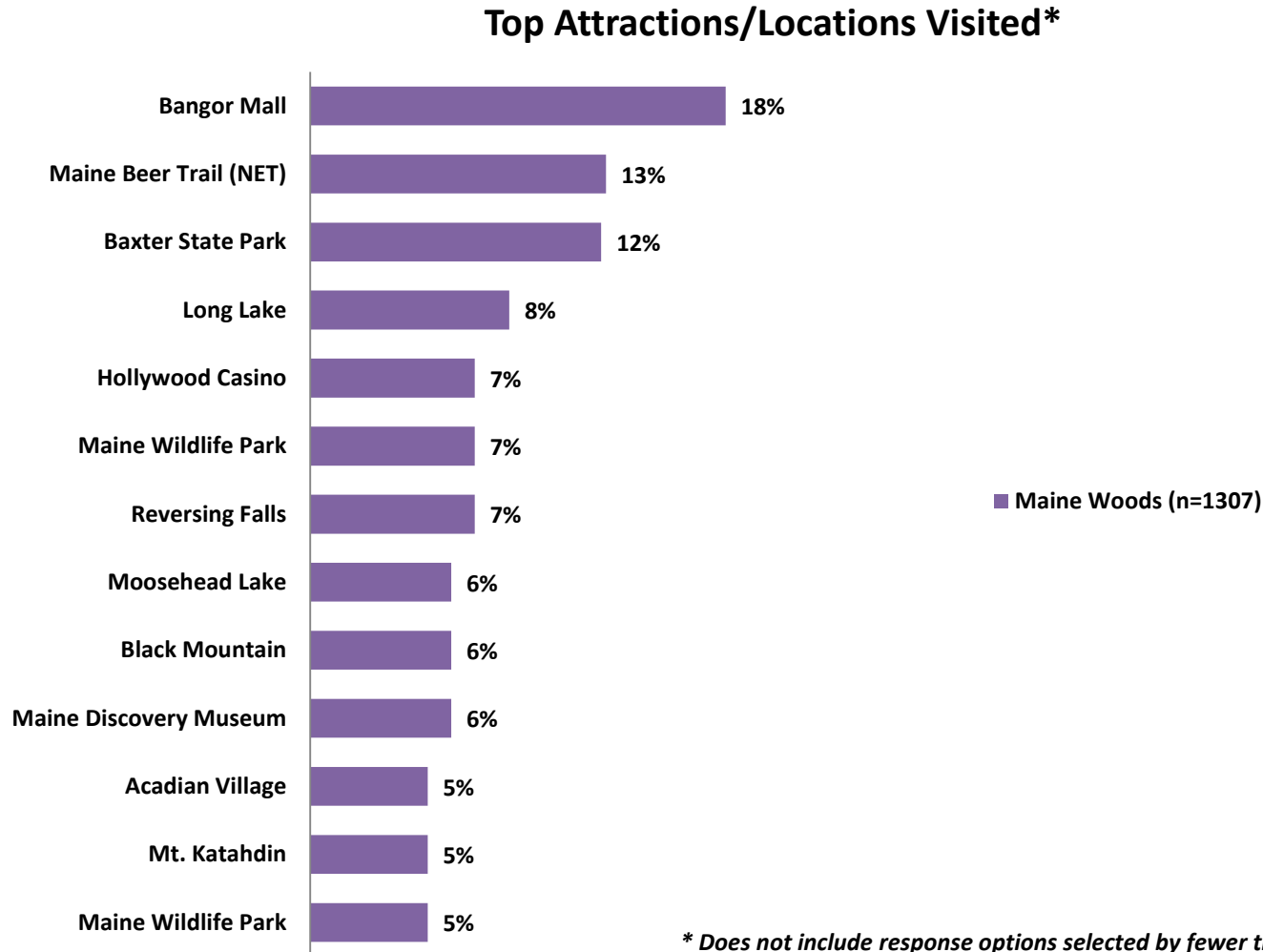


Q34. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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Overnight visitors to the Maine Woods are most likely to visit the Bangor Mall.



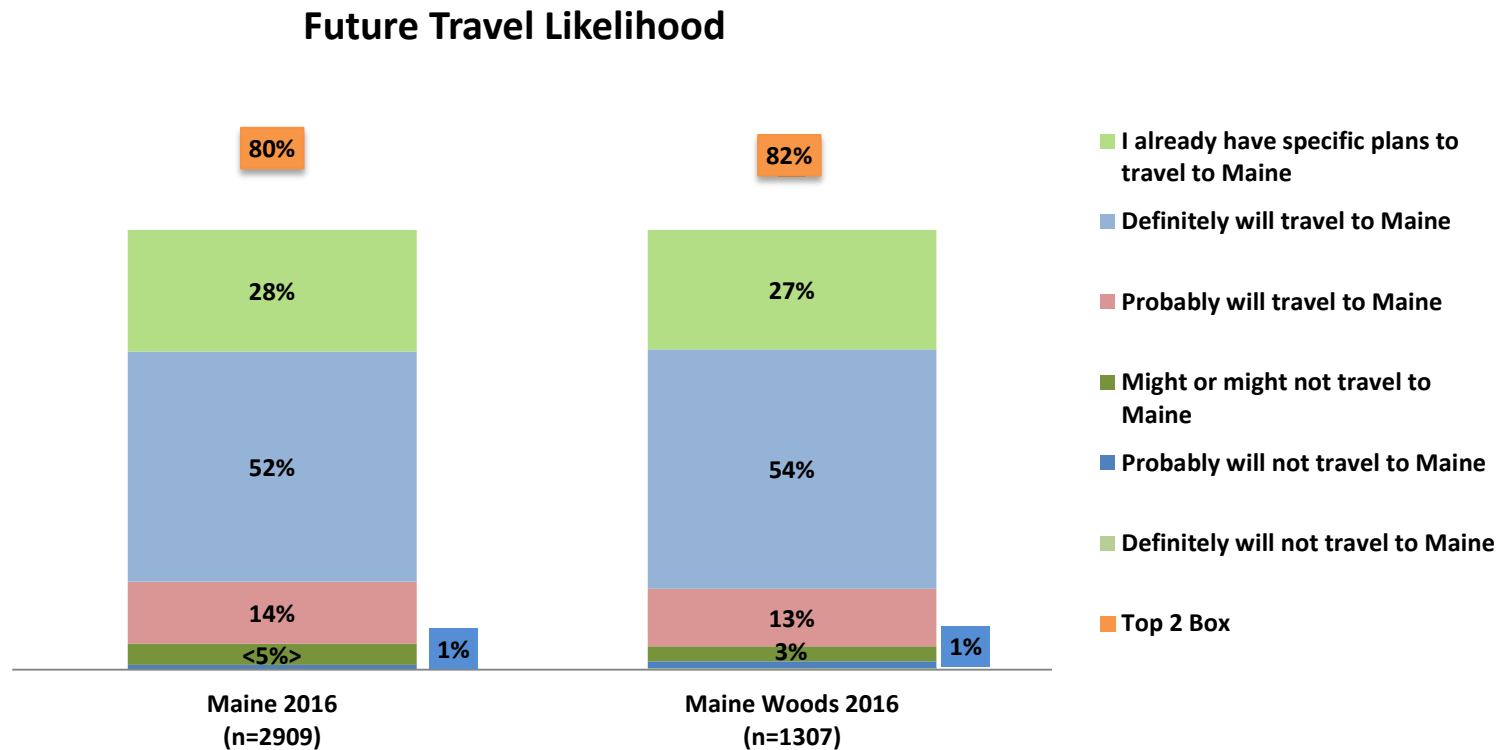
* Does not include response options selected by fewer than 5% of respondents.

Q29: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

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Four-fifths of overnight visitors to the region either *already have plans* to return to Maine or indicate that they *definitely will return*.



Q41. How likely will you be to travel in Maine in the next two years?

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Day Visitors: Traveler Description

Day Visitor Demographics

- Day visitors to the Maine Woods Area are 44 years old, on average, and have annual household incomes just over \$80,000. Three-fifths have at least a college degree, and just over half are married.
- Day visitors to this region have average household incomes that are lower than day visitors to the State overall, and they trend younger as well.

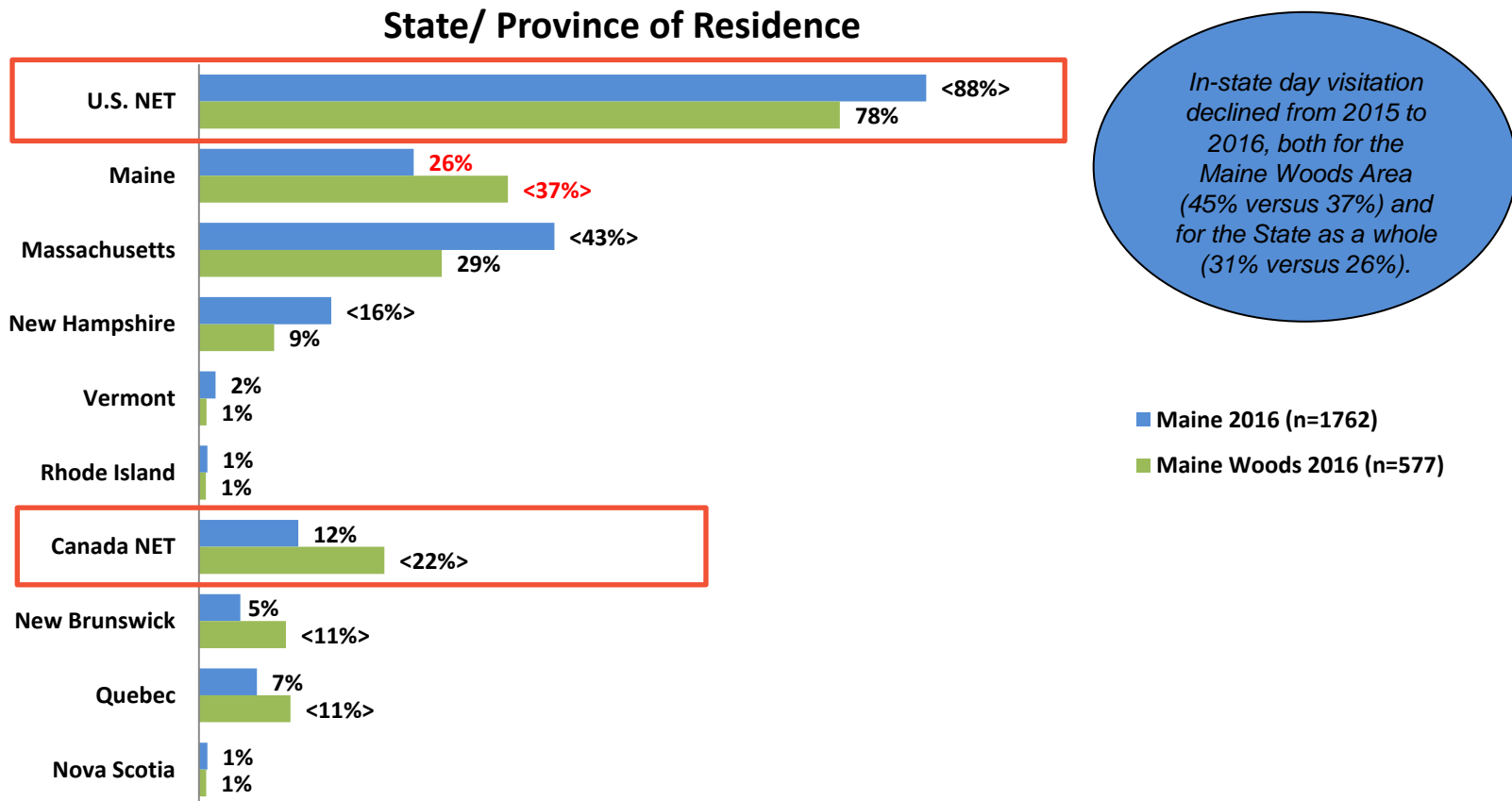
Day Visitors	Maine 2016 (n=1762)	Maine Woods 2016 (n=577)
Age:		
< 35	28%	30%
35 - 44	18%	22%
45 - 54	19%	18%
55 +	<35%>	30%
Mean Age (Years)	<46.0>	44.4
Income:		
< \$50,000	26%	<33%>
\$50,000 - \$99,999	42%	39%
\$100,000 +	<32%>	28%
Mean Income	<\$88,100>	\$80,300
Female	75%	73%
College Degree or Higher	63%	59%
Married	56%	53%
Employed Full-Time	52%	55%

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Three in four day visitors to the Maine Woods Area are U.S. residents, with the highest proportion originating from Maine.

- Overall, the Maine Woods Area attracts a greater proportion of day visitors from Canada, as compared to the State as a whole, and a lesser proportion from the United States.
- Specifically, the Maine Woods is a more popular destination than the State overall for in-state day visitors and those from New Brunswick. Day visitors from Massachusetts and New Hampshire, however, are less likely to be visiting this region than the rest of the State.



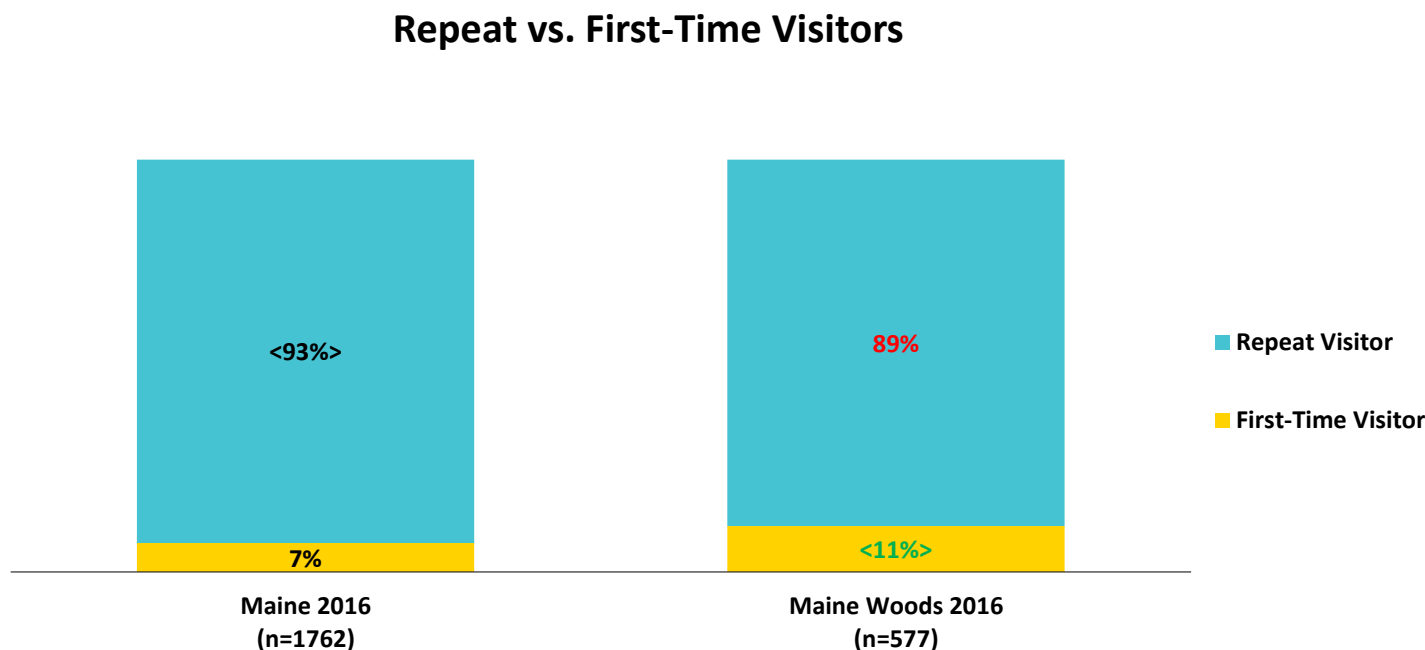
Q2. In what State or Province do you live?

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Nine in ten day visitors to the Maine Woods Area are repeat visitors.

- The Maine Woods Area attracts a greater proportion of first-time day visitors, as compared to the State of Maine as a whole.



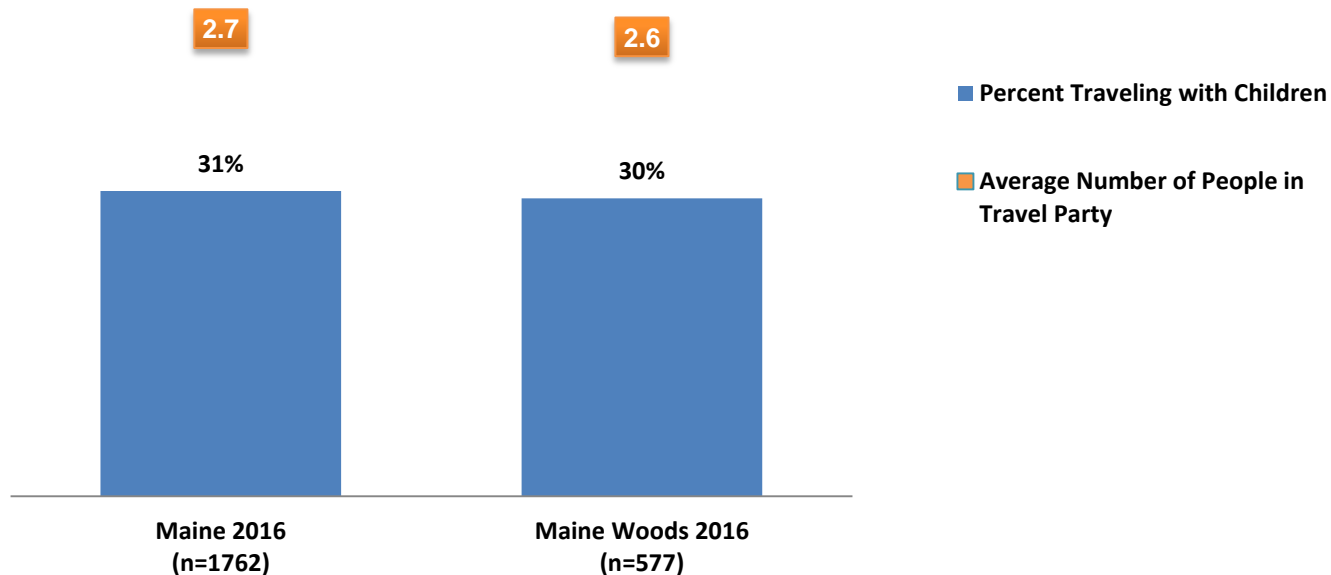
Q10. Was this your first visit to Maine?

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Three in ten day visitors to the Maine Woods are traveling with children.

Travel Party Composition



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

Q16. How many of these people were: Children

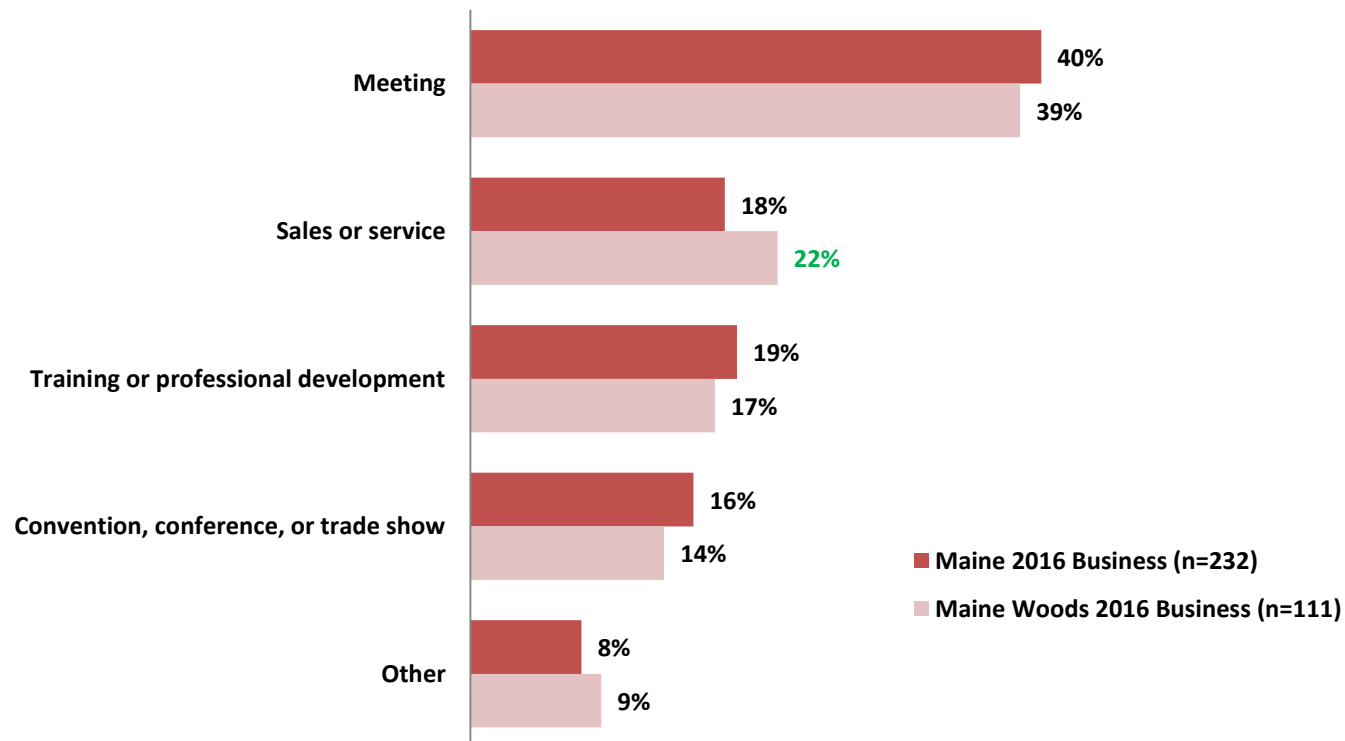
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Day Visitors: Trip Experience

Two in five business day visitors are in the Maine Woods Area for a general meeting.

Primary Purpose of Day Business Trips



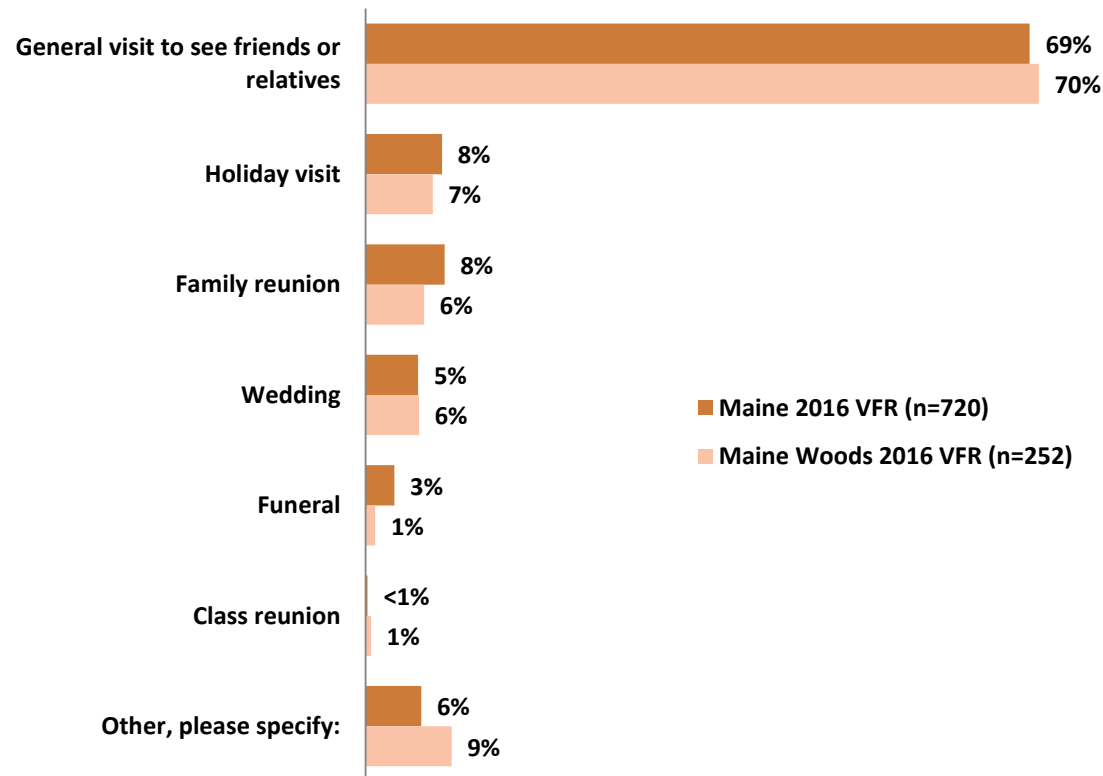
Q8. What was the primary purpose of your most recent business trip in Maine?

<> 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.

Most Maine Woods day visitors on a VFR trip are visiting primarily for a *general visit to see friends/relatives*.

Primary Purpose of Day VFR Trips



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

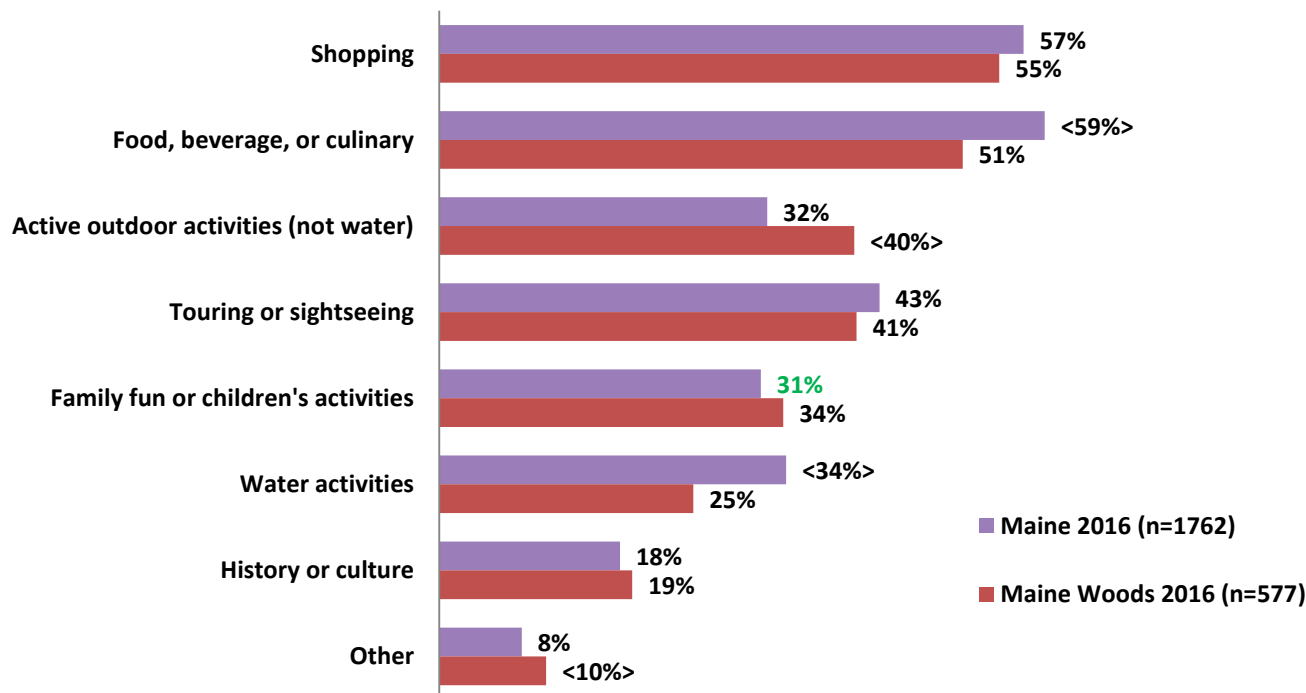
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The top interest areas pursued by day visitors to this area are *shopping and food/beverage/culinary activities*.

- Day visitors to the Maine Woods Area are more likely than day visitors to Maine overall to be interested in pursuing *active outdoor activities* and less likely to be interested in *food/beverage/culinary activities* and *water activities*.

2016 Interest Areas



Most Important Interest Area Maine Woods

31%
24%
48%
43%
46%
25%
18%
84%

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

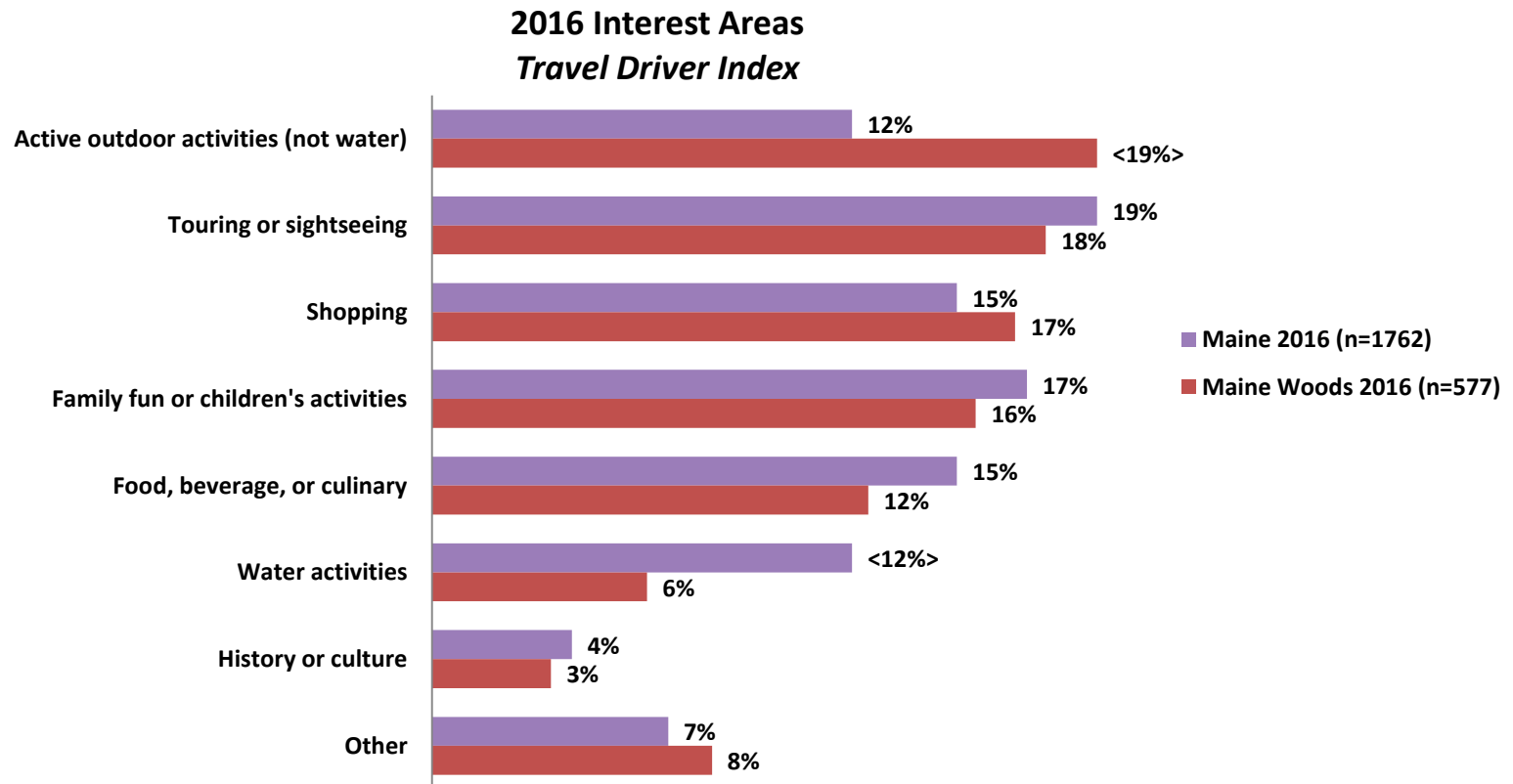
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 34

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

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When looking at both interest and importance, a number of interest areas rise to the top for day visitors to the Maine Woods Area.

- When looking at visitors' interest in various activities along with the importance they place on these activities in selecting Maine as a destination, day visitors to the Maine Woods region are more likely than visitors to the State as a whole to place importance on *non-aquatic active outdoor activities*. They are less likely than visitors to the State as a whole to place importance on *water activities*.



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.*

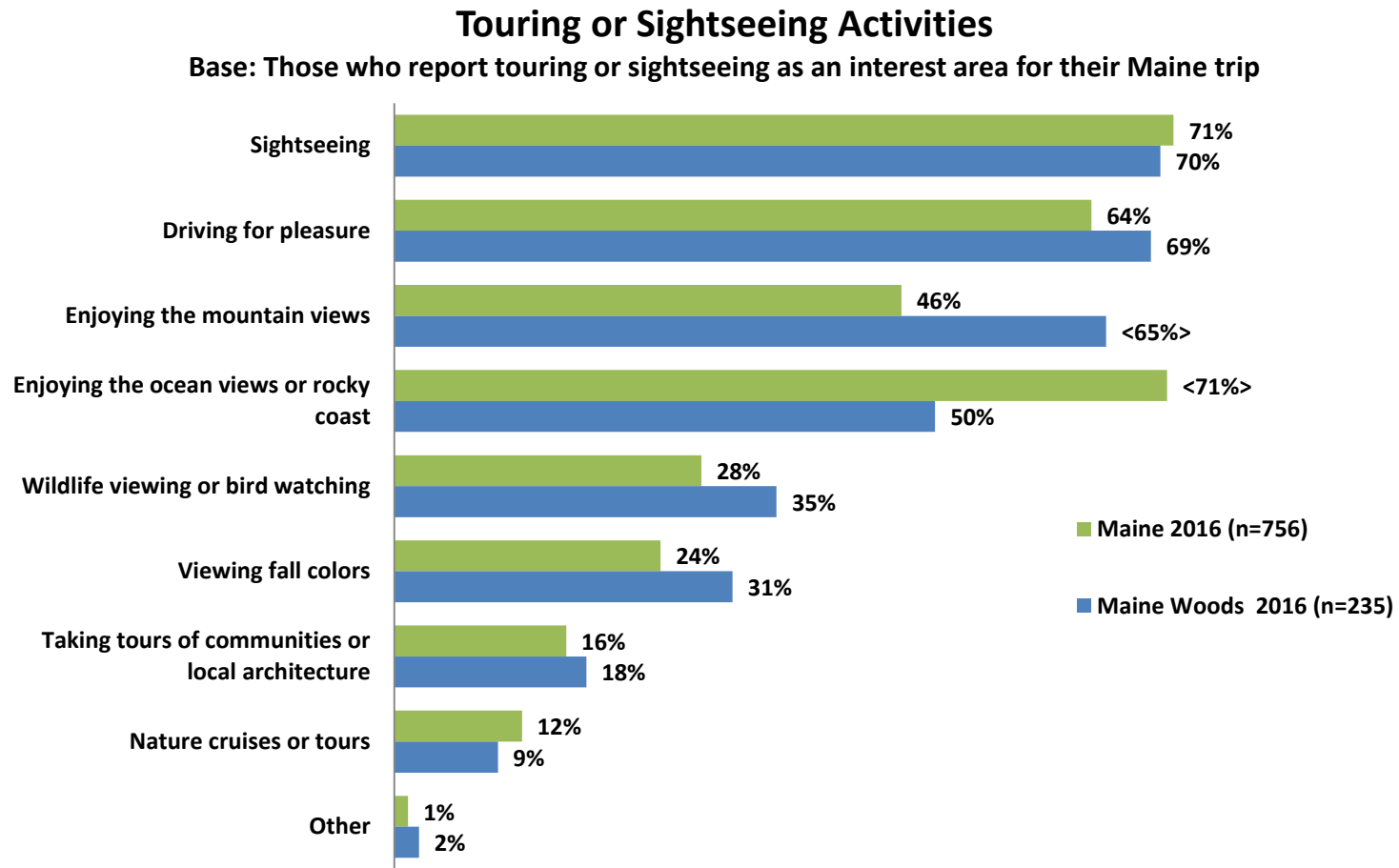
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 35

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

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Sightseeing and driving for pleasure are the most popular touring/sightseeing activities for day visitors to the Maine Woods.

- Enjoying the mountain views is more popular among Maine Woods day visitors than it is among day visitors to the State as a whole, while enjoying the ocean views is less popular among Maine Woods day visitors.



Q20. 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.

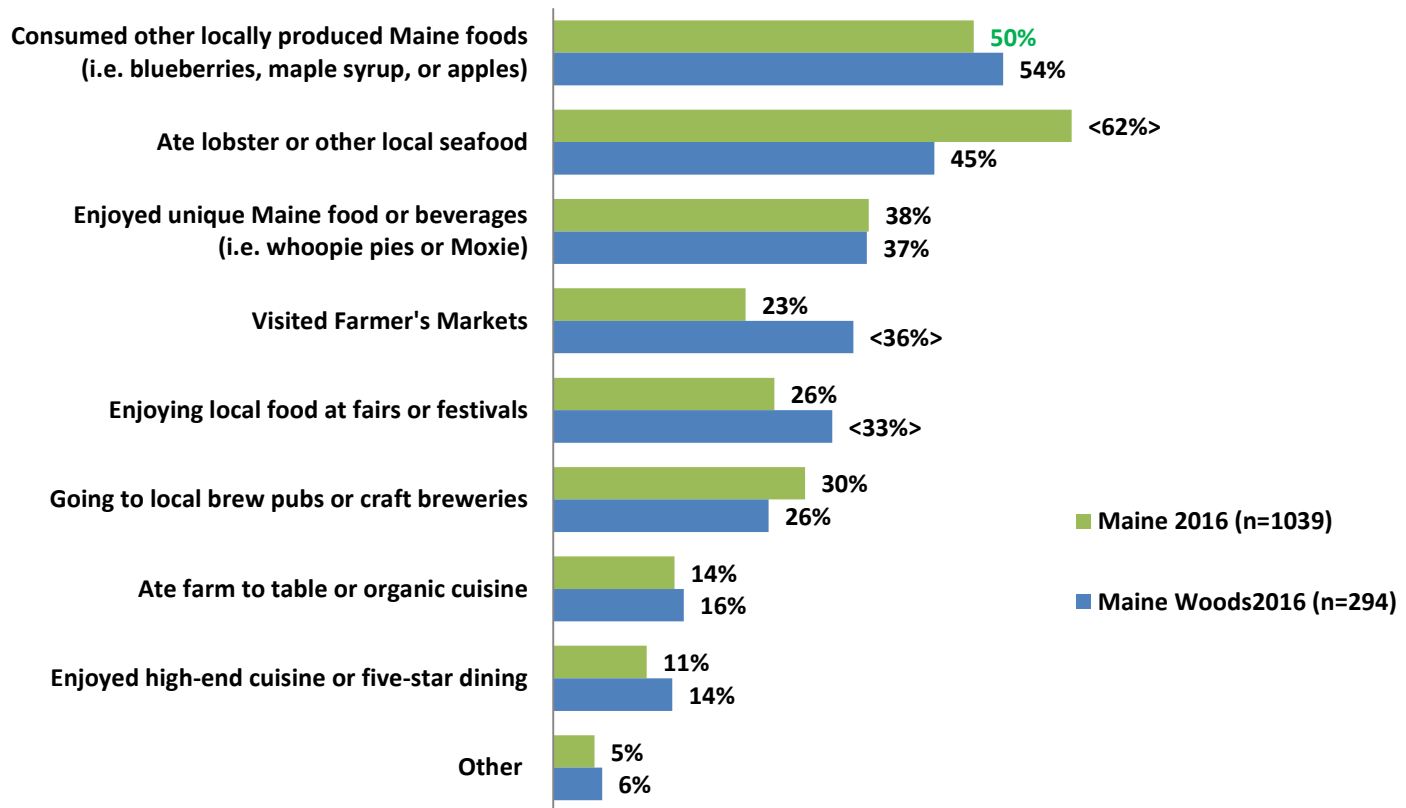
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Among day visitors interested in food/beverage/culinary activities, more than half say they *consumed non-seafood locally produced Maine foods* while visiting the Maine Woods Area.

- Day visitors to the Maine Woods region are more likely than visitors to the State as a whole to have *enjoyed local foods at fairs or festivals* and *visited Farmer's Markets* while in the area. They are less likely to have *eaten lobster or other local seafood*.

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 subgroups at the 95% confidence level.

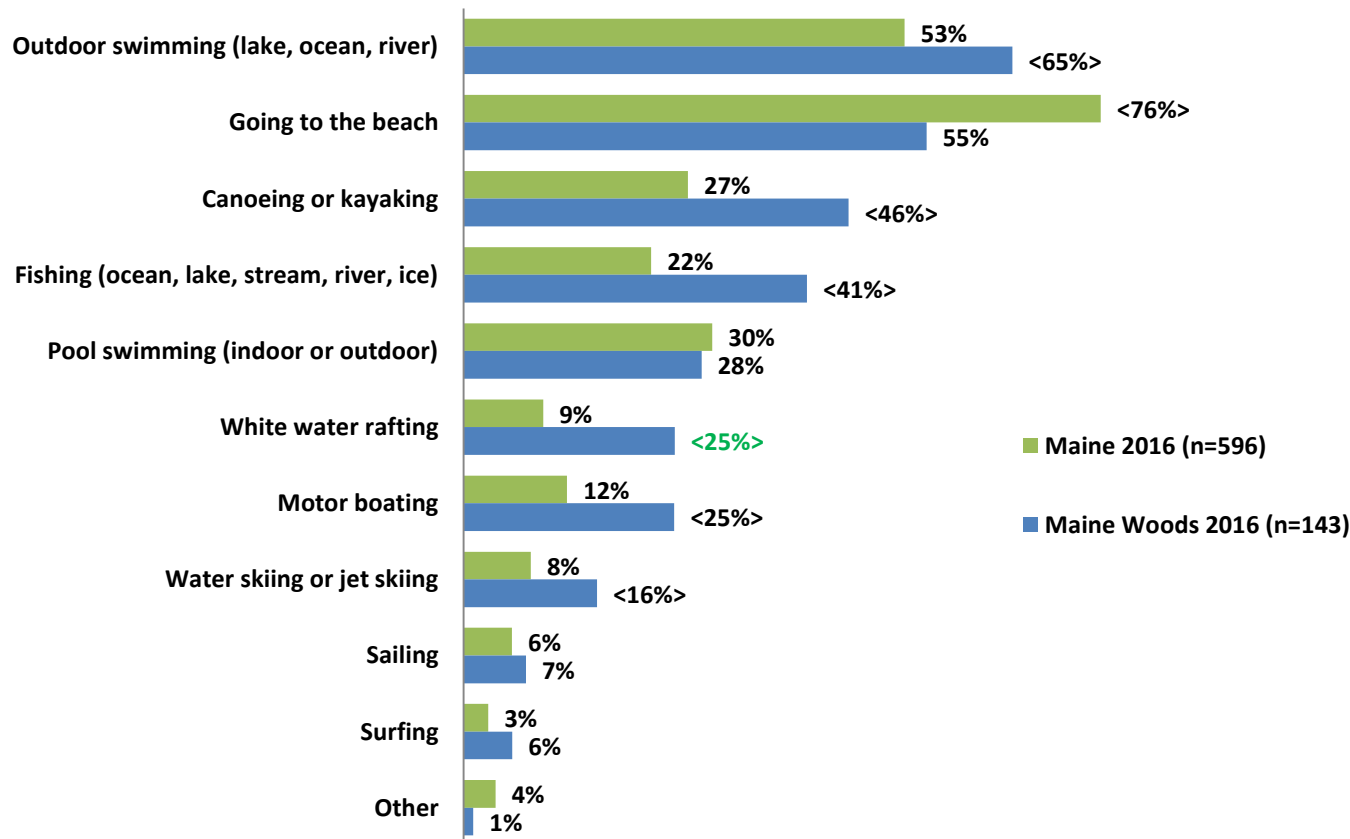
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine Woods day visitors who are interested in water activities are most likely to *go swimming outdoors*.

- Maine Woods day visitors are more likely than day visitors to the State as a whole to participate in various water activities while visiting: *outdoor swimming, canoeing/kayaking, fishing, white water rafting, motor boating, and water/jet skiing.*

Water Activities

Base: Those who report water 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 subgroups at the 95% confidence level.

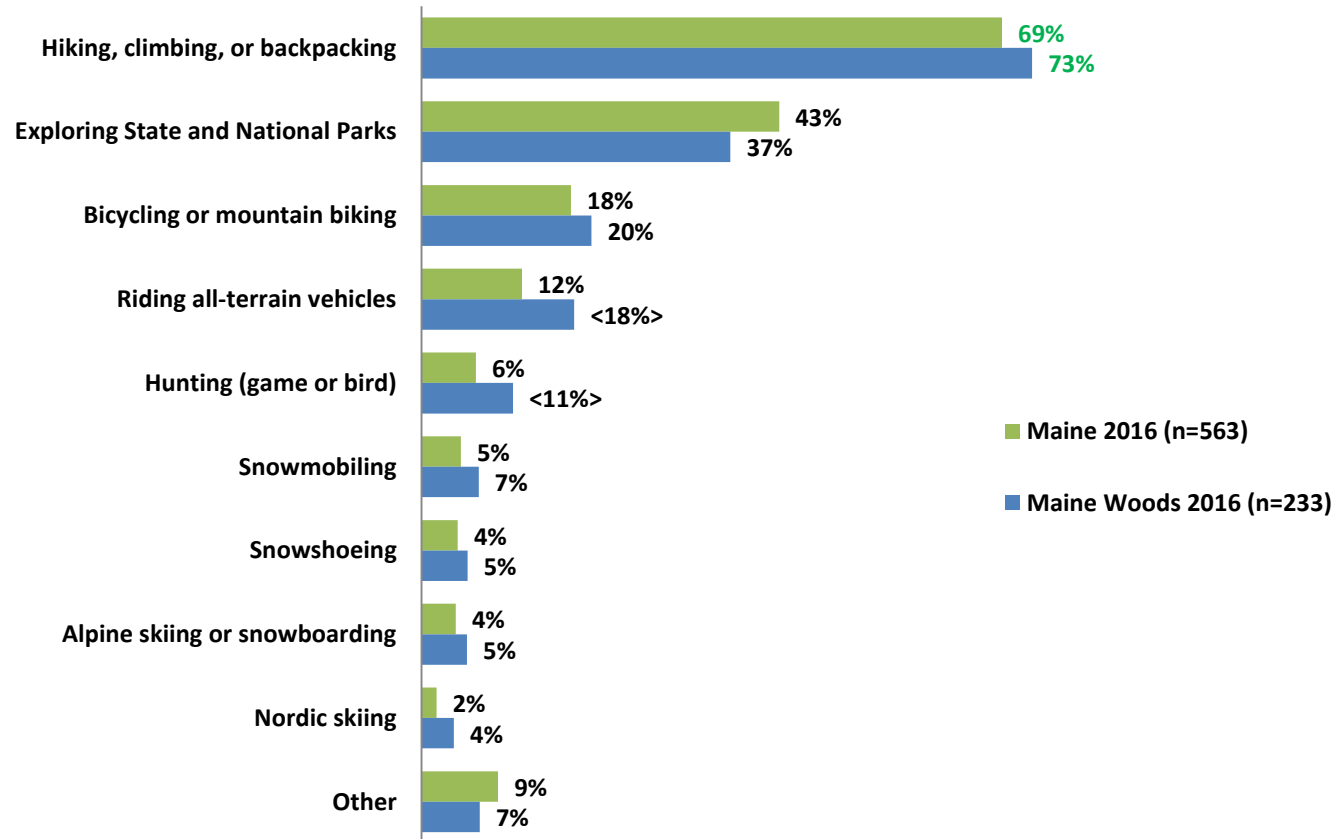
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three in four day visitors interested in non-aquatic outdoor activities say they went *hiking, climbing, or backpacking* while visiting the Maine Woods Area.

- Day visitors to the Maine Woods region are more likely than visitors to the State as a whole to have spent time *riding ATVs* and *hunting* while in the area.

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 subgroups at the 95% confidence level.

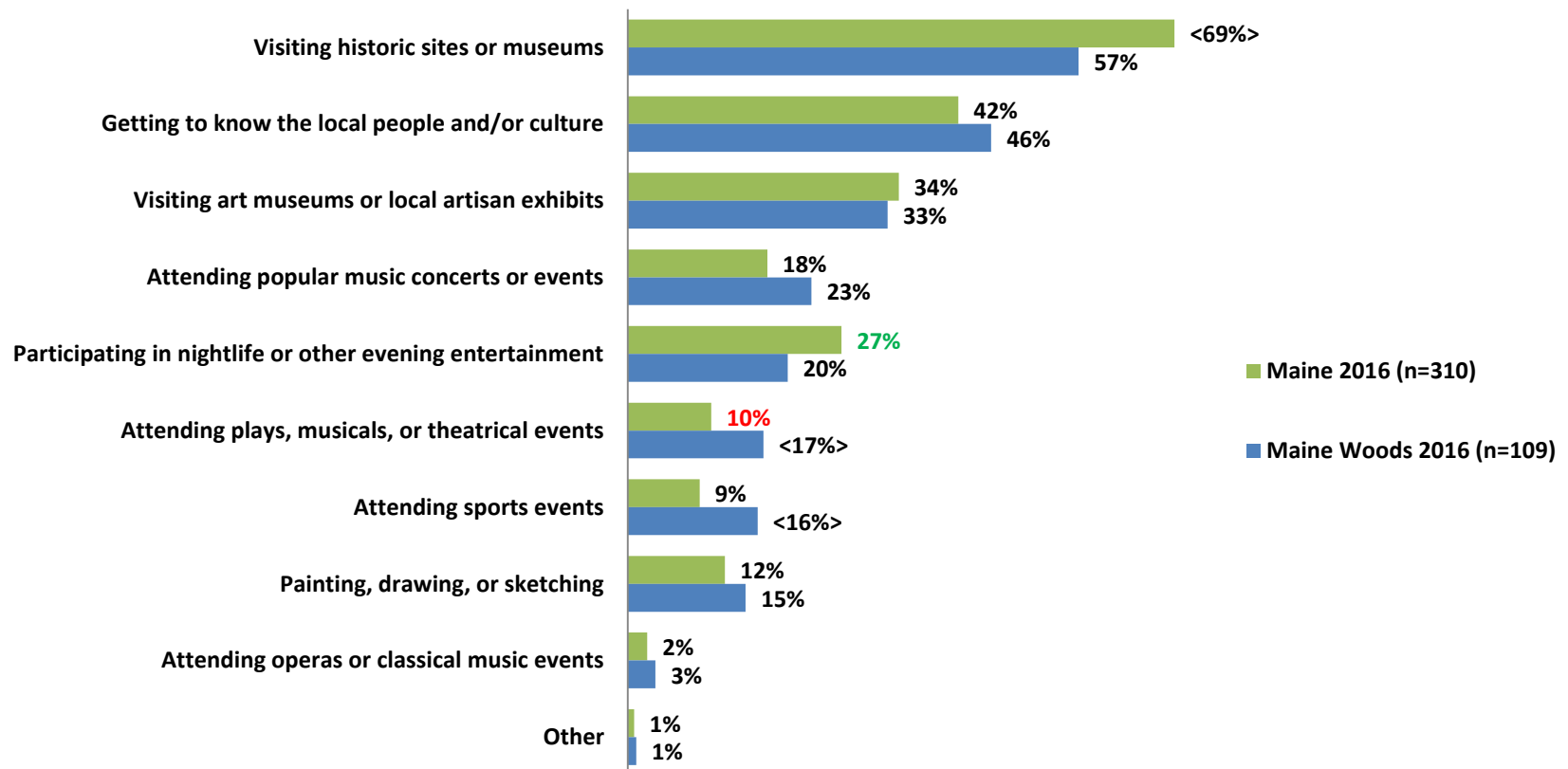
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common history or culture activity that Maine Woods day visitors take part in is *visiting historic sites/museums*.

- Though *visiting historic sites or museums* is the most popular history/culture activity among Maine Woods day visitors, it is less popular than among day visitors to the State as a whole.
- Day visitors to the Maine Woods Area are more likely to *attend sports events* and *plays/musicals/theatrical events* than are 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



Q20. 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.

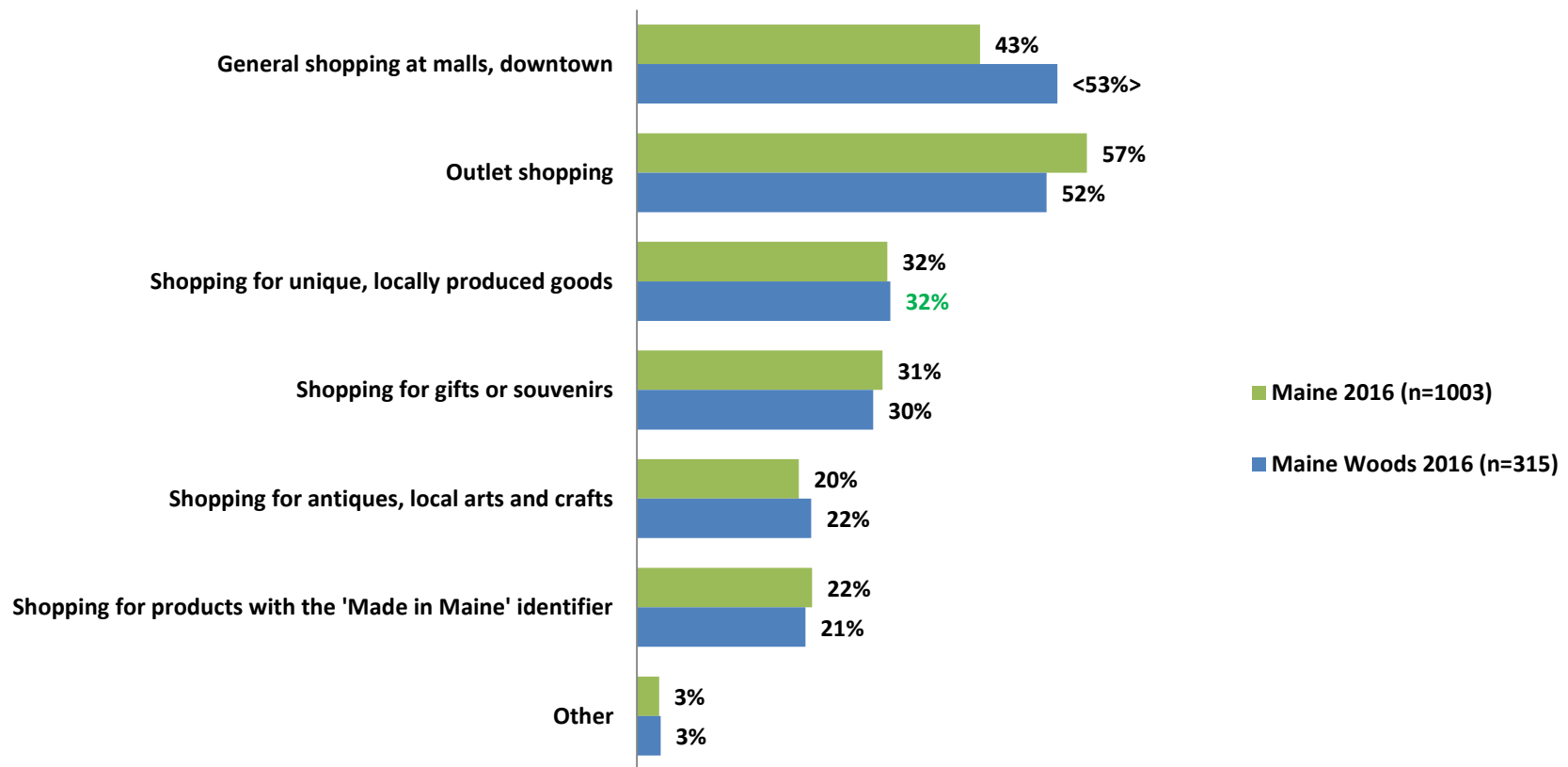
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine Woods day visitors interested in shopping are most likely to do some *general shopping at malls/downtown* or *outlet shopping*.

- General mall or downtown shopping is more popular among Maine Woods shopping enthusiasts than it is among shoppers visiting the State of Maine as a whole.

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.*

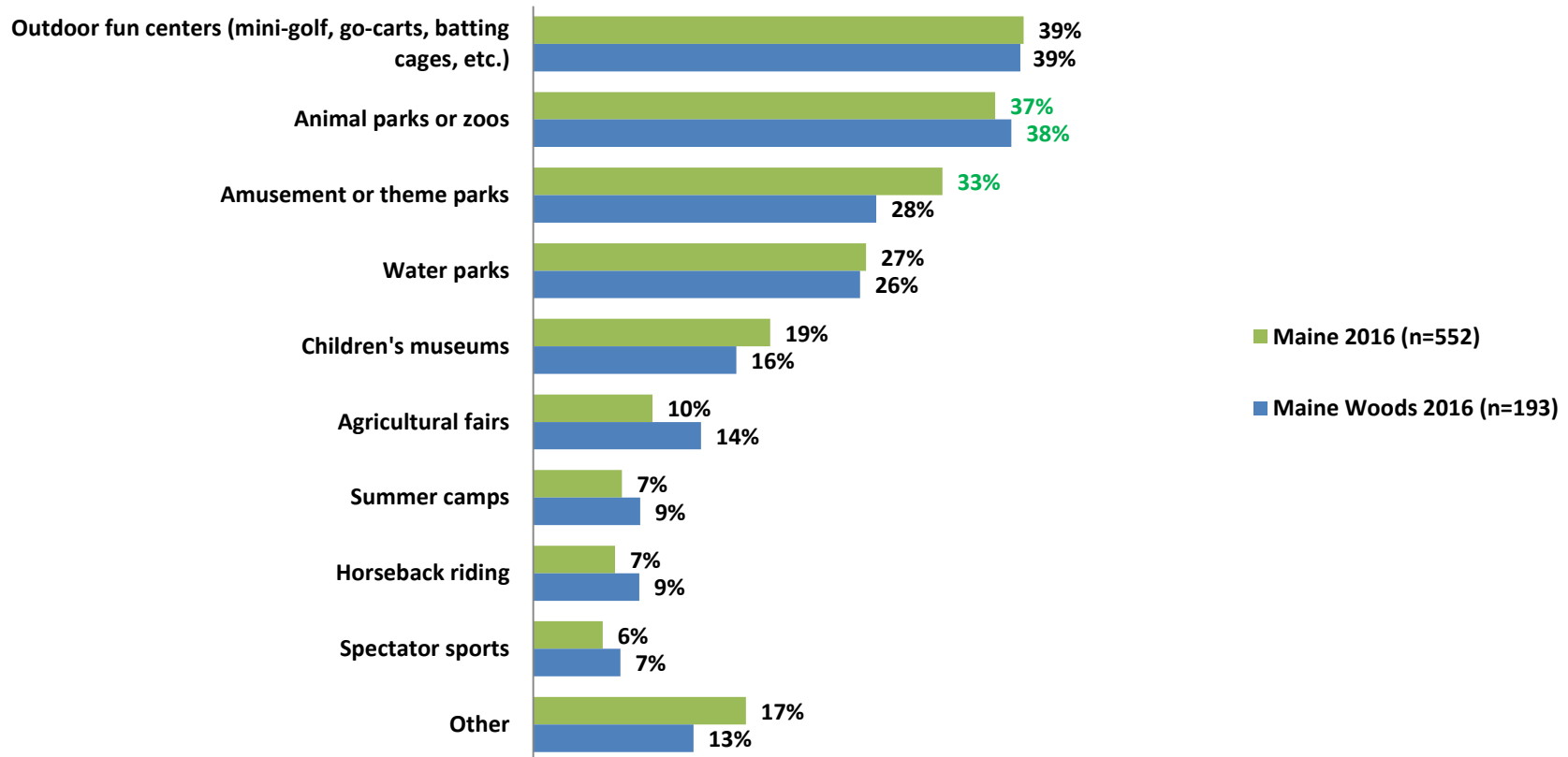
<> indicates a significant difference between subgroups at the 95% confidence level.

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

Outdoor fun centers and animal parks/zoos are the most common family fun/children's activity among Maine Woods day trippers.

Family Fun/Children's Activities

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

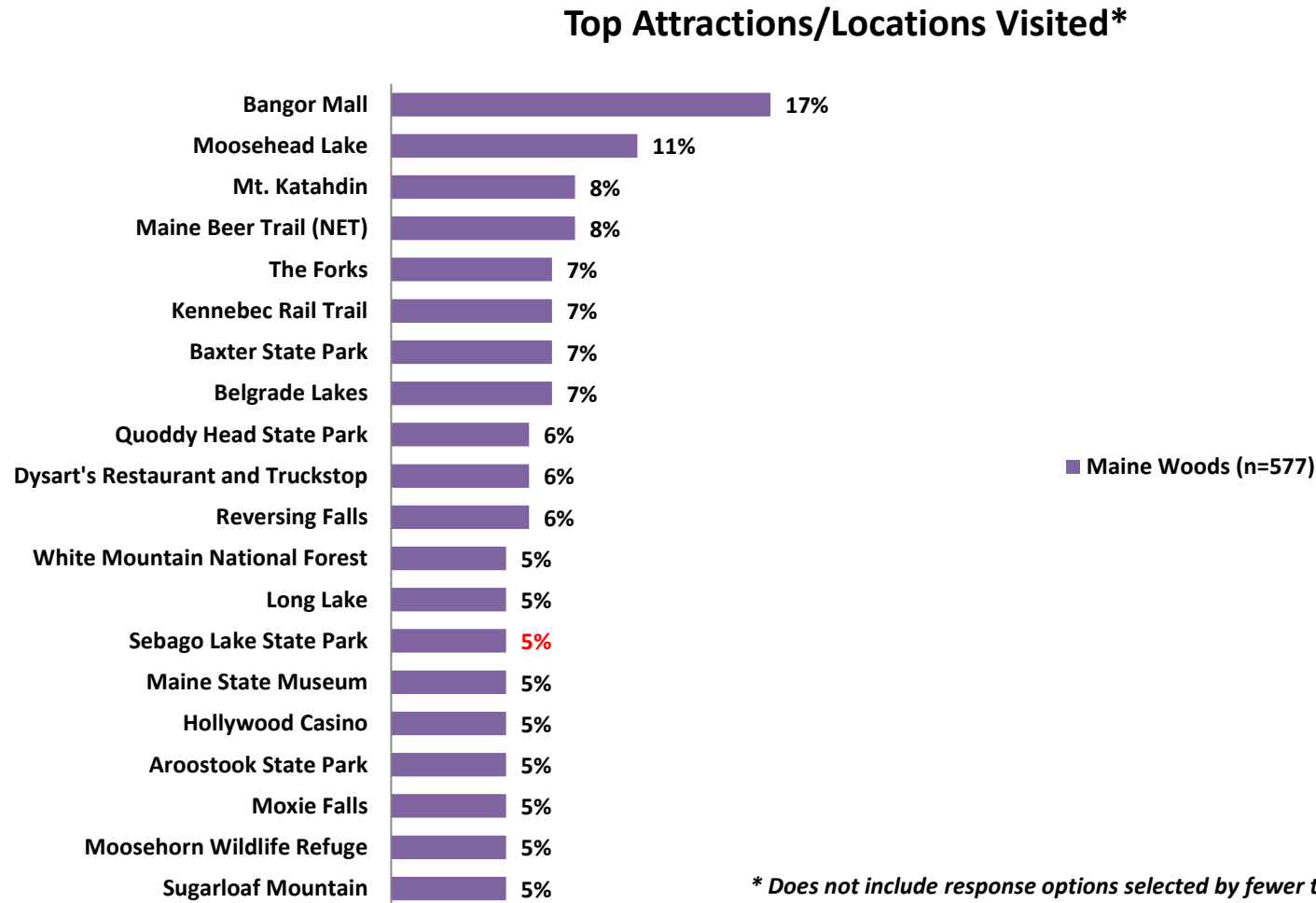


Q20. In which of the following activities did you participate during this trip? Please check all that apply.

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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.

As seen with overnight visitors to the Maine Woods Area, the *Bangor Mall* is also the most visited location among day visitors.



Q24: 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 Woods Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Maine Woods region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in:
 - Visitor demographics,
 - Visitor origin,
 - Areas of interest, and
 - The activities they participate in while visiting.
- Highlights of these differences are shown on the following pages.

Visitor Origin

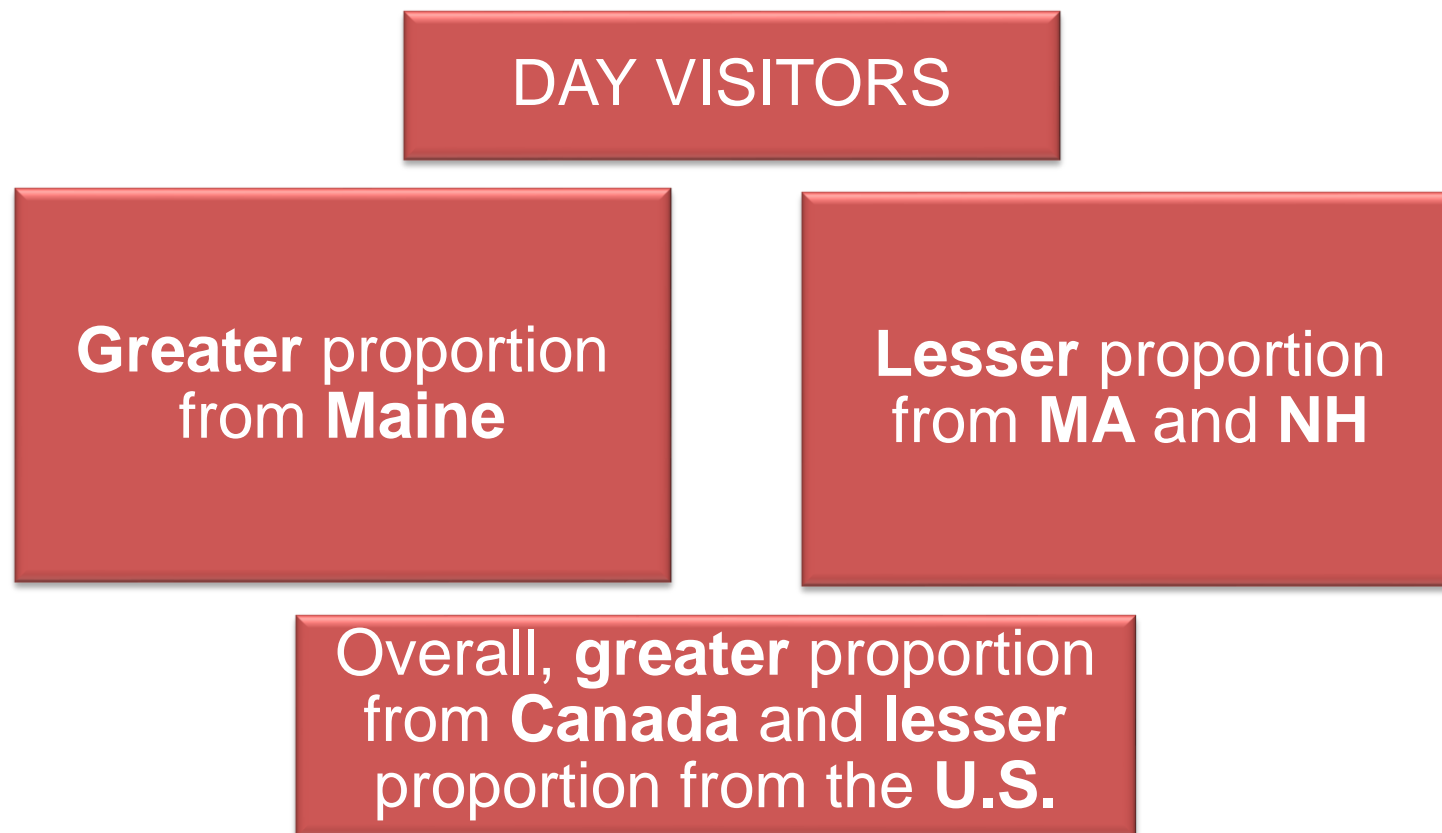
Compared to visitors to the entire State, visitors to the Maine Woods region differ in the following ways:

OVERNIGHT VISITORS

Greater proportion
from **Mid-Atlantic**
states and **Canada**

Lesser proportion
from **New England**
(specifically **MA**)

Visitor Origin



Visitor Demographics

DAY VISITORS

OVERNIGHT VISITORS

Younger
Lower annual household
income

**More likely to be
employed full-time**
**More likely to travel with
kids**

Visitor Demographics

OVERNIGHT AND DAY VISITORS

More likely to be first-time visitors
More likely to be categorized as
Balanced Achievers

Trip Interest Areas

OVERNIGHT VISITORS

More likely to want to
pursue:

Active outdoor activities

History or culture

Less likely to want to pursue:

Shopping

Touring or sightseeing

Food/beverage/culinary
activities

Trip Interest Areas

DAY VISITORS

More likely to want to
pursue **active outdoor**
activities

Less likely to want to pursue:
Food/beverage/culinary
activities
Water activities

Trip Interests and Importance (Travel Driver Index)

DAY VISITORS

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

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

Trip Activities

OVERNIGHT AND DAY VISITORS

More likely to be:

Enjoying the mountain views
Canoeing/kayaking
Visiting Farmer's Markets
Enjoying local foods at fairs
Hunting
Attending sports events
General shopping at
malls/downtown

Less likely to be:

Eating lobster or other local
seafood
Going to the beach
Enjoying the ocean views
Visiting historic sites/museums

Trip Activities

OVERNIGHT VISITORS

More likely to be:

- Viewing wildlife/bird watching
- Viewing fall colors
- Horseback riding
- Attending summer camps
- Alpine skiing/snowboarding
- Snowmobiling
- Attending operas or classical music events
- Water skiing/jet skiing
- White water rafting

Less likely to be:

- Swimming outdoors
- Outlet shopping
- Shopping for unique, locally produced goods

Trip Activities

DAY VISITORS

More likely to be:

Fishing

Swimming outdoors

White water rafting

Motor boating

Water skiing or jet skiing

Riding ATVs

Attending plays, musicals, or
theatrical events



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