

# Maine Office of Tourism

## Visitor Tracking Research

### 2018 Calendar Year Annual Report



## Regional Insights: **Kennebec Valley**



*Prepared by*

**dpa** 

providing direction  
in travel & tourism

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A Division of DRI

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# Regional Insights: Kennebec Valley

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# Introduction

- This report provides a profile of visitors and their trips to the Kennebec **Valley** tourism region during 2018, from a survey of:
  - 171 overnight visitors, and
  - 121 day visitors.
  
- Throughout this report, data for the Kennebec Valley tourism region is 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 < > around the larger figure.
 

*(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 2017 and 2018 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.



# Visitors to the Kennebec Valley: How They Are Unique



## Comparisons: Region vs. State

- Visitors to the Kennebec Valley tourism region and visitors to the state of Maine as a whole in 2018 differed in a number of ways. These variations can be seen in their:
  - Demographics,
  - Areas of origin,
  - Reasons for traveling, and
  - Activities while visiting.
- Popular trip activities and travel interests closely followed the natural environment available in the Kennebec Valley region.
- Highlights of these differences are shown on the following pages.

# Visitor Origin and Demographics

*Visitors to the Kennebec Valley region, compared to visitors statewide, were...*

## Overnight Visitors

**More** likely to be Maine residents.

**Less** likely to have a college degree.

**Less** likely to be employed full-time.

## Day Visitors

**More** likely to be Maine residents.

**Less affluent**, with lower average incomes.





# Trip Interest Areas

*Visitors to the Kennebec Valley region, compared to visitors statewide, were...*



## Overnight Visitors

**Less** likely to be interested in shopping.



## Day Visitors

**Less** likely to be interested in shopping and water activities.

# Trip Interests and Importance (Travel Driver Index)

*Visitors to the Kennebec Valley region, compared to visitors statewide, were...*



## Overnight Visitors

**More** likely to have their trips driven by water activities.



## Day Visitors

**Less** likely to have their trips driven by water activities.



# Trip Activities

*Visitors to the Kennebec Valley region, compared to visitors statewide, were...*

## Overnight Visitors

### **More likely to:**

- Go for a pleasure drive, and
- Go white water rafting.

### **Less likely to:**

- Enjoy coastal views;
- Go to the beach;
- Participate in nightlife or evening entertainment; and
- Paint, draw, or sketch.

## Day Visitors

### **More likely to:**

- Go to agricultural fairs;
- Eat farm to table or organic foods; and
- Go fishing.

### **Less likely to:**

- Enjoy coastal views;
- Go for a pleasure drive;
- Take a tour of communities or local architecture; and
- Go shopping at outlet stores.

# Visitation and Economic Impact Summary



# Visitation and Economic Impact Summary: Kennebec Valley

## 2018 Regional Tourism Impact Estimates

### Kennebec Valley



An estimated **2.78 million** travelers visited the Kennebec Valley region in 2018 ~ a **6.2% increase** over 2017.

**2017 Total**  
2.62 million

(6.0% of All Maine Visitors)

**2018 Total**  
2.78 million

(6.1% of All Maine Visitors)

#### Number of Visitors to Kennebec Valley Region

\* Percent of estimated total  
Maine day visitors

1.55 million  
(6.7%)\*

1.71 million  
(6.9%)\*

\*\* Percent of estimated total  
Maine overnight visitors

1.07 million  
(5.3%)\*\*

1.07 million  
(5.2%)\*\*

2017

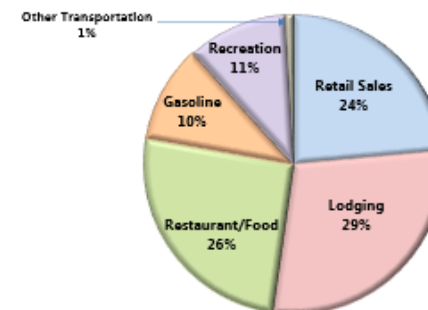
2018

The visitation estimates shown above include all visitors on tourism-related trips. Tourism related trips include: all leisure trips, trips that are a general visit to see friends or relatives, a wedding, a holiday visit, and business trips that are for a convention/conference/trade show or training/professional development.

## 2018 Regional Tourism Impact Estimates

### Kennebec Valley

In 2018, Kennebec Valley visitors spent **\$304.3 million** ~ up **2.1%** from 2017.



#### The \$304.3 million spent by visitors to the Kennebec Valley supported at total of...

Economic Impact begins when a visitor spends money in a region. But the benefits to a local economy go well beyond the impact of this initial spending. These "direct economic impact" dollars continue to circulate through the economy, as (for example) innkeepers pay wages, restaurateurs purchase raw ingredients, and so on. These additional rounds of spending are called "indirect economic impact." Total economic impact is the sum of the travelers' initial (direct) spending and the subsequent (indirect) spending by residents of the area. The jobs created, income earned, and tax dollars received are based on the total economic impact.

4,992 jobs

\$96.4 million  
in total  
earnings

\$28.0 million  
in total taxes

These economic impact estimates are based on all overnight visitors and out-of-state day visitors on tourism-related trips (as defined on the opposite page). Economic Impact is estimated using DPA's visitor expenditure estimates and the RMS II economic impact model.

# OVERNIGHT VISITORS







# Visitor Profile

# Overnight Visitor Demographics

- The average surveyed overnight visitor to the Kennebec Valley region in 2018 was 41 years old. Half were employed full-time, and their average income overall was about \$80,000 per year. Just over half had a college degree, and four in ten were married.
- Compared to overnight visitors statewide, overnight visitors to the region were less likely to have a college degree and were less likely to be employed full-time.

	Maine 2018 (n=2901)	Kennebec Valley 2018 (n=171)
<b>Age:</b>		
< 35	46%	42%
35 – 44	23%	16%
45 – 54	14%	16%
55 +	17%	<26%>
Mean	39.0	41.2
<b>Income:</b>		
< \$50,000	27%	32%
\$50,000 - \$99,999	43%	41%
\$100,000 +	30%	27%
Mean	\$86,400	\$80,900
<b>Female</b>	66%	71%
<b>College degree or higher</b>	<65%>	55%
<b>Married</b>	47%	42%
<b>Employed full-time</b>	<62%>	48%

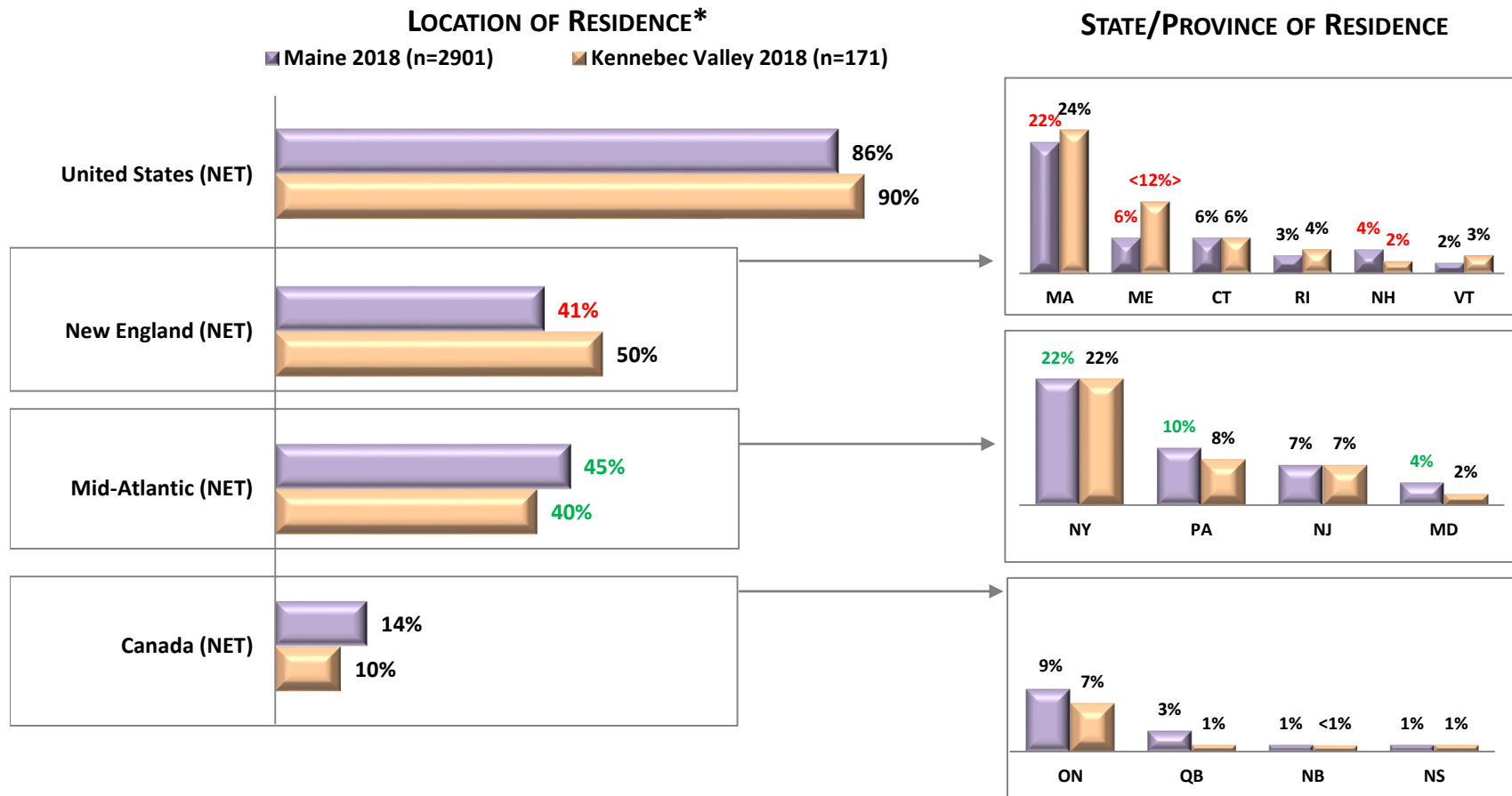
<> indicates a significant difference between this region and the State at the 95% confidence level.

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



The vast majority of surveyed overnight travelers to the region in 2018 came from the U.S., tipping slightly in favor of New Englanders over those from the Mid-Atlantic.

- Massachusetts and New York provided the largest shares of visitors to the region (and the state as a whole).
- Mainers made up a larger share of overnight visitors to the Kennebec Valley than the state as a whole.



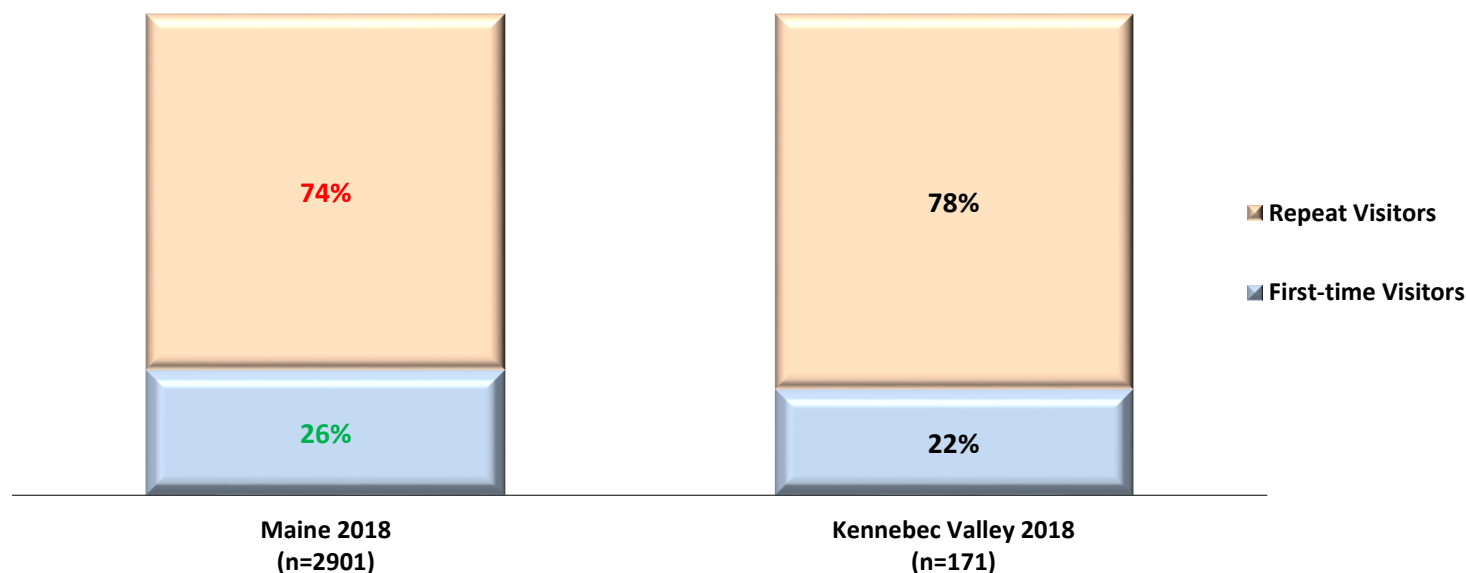
\*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

<> 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 out of five overnight visitors to the Kennebec Valley were visiting Maine for the first time.

### REPEAT VS. FIRST-TIME VISITORS

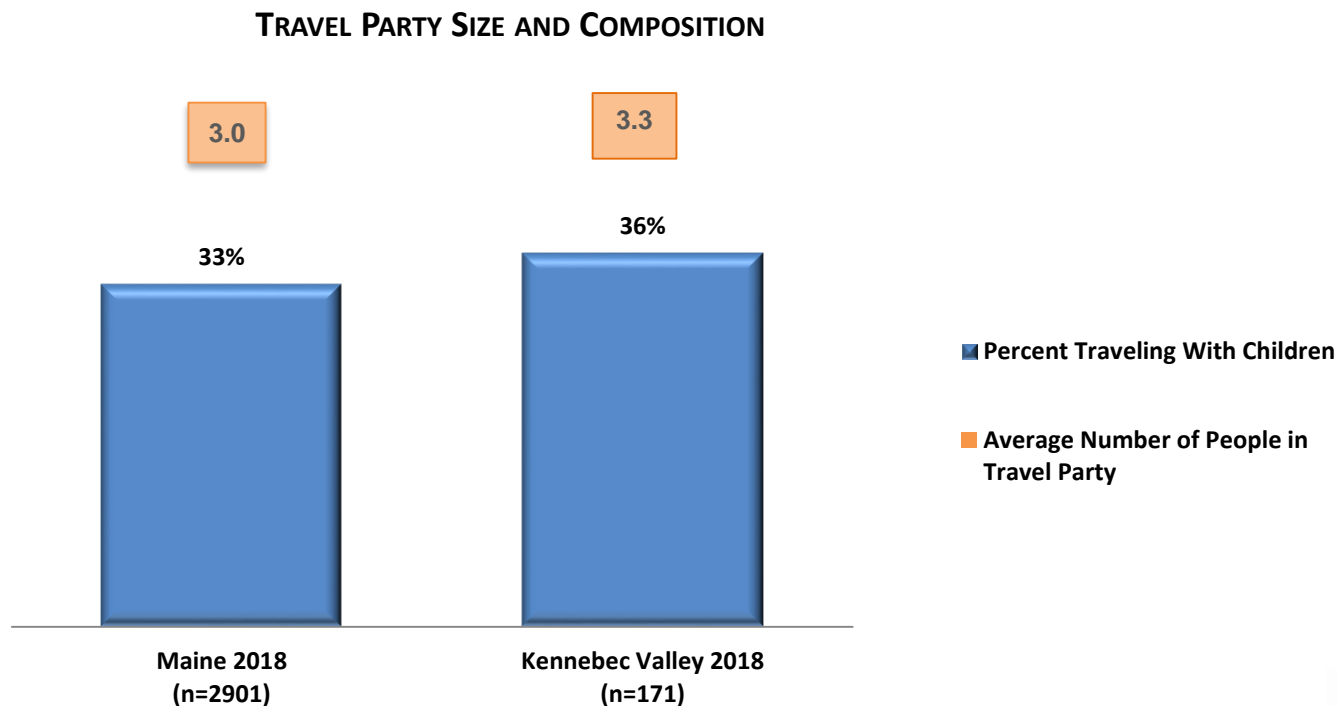


Q11. Was this your first visit in Maine?

<> 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.

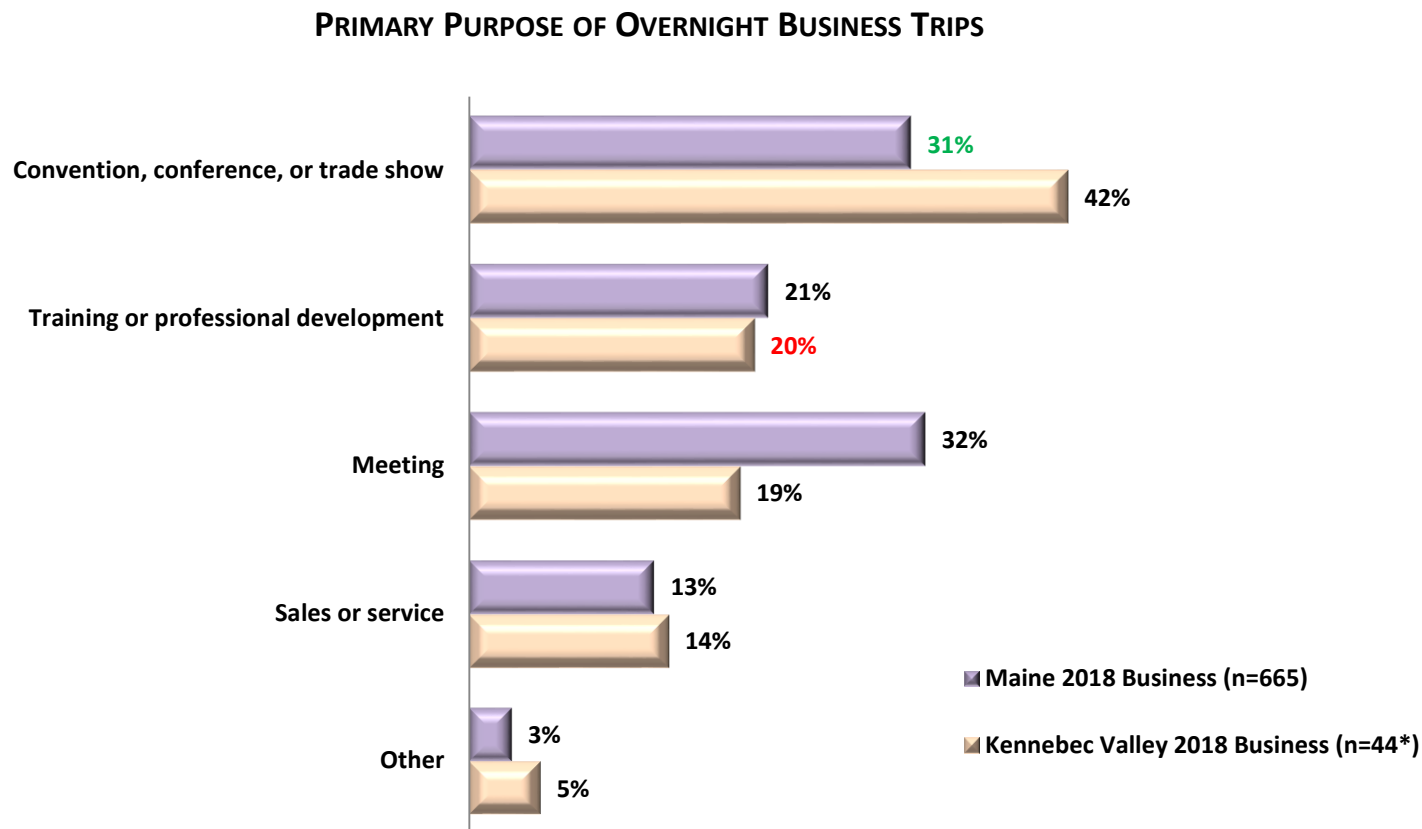
The average size of travel parties visiting the region overnight was about three people, and about a third were traveling with children.





# Trip Experience

By a wide margin, conventions, conferences, and trade shows were the most common reason overnight visitors came to the region for business.



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

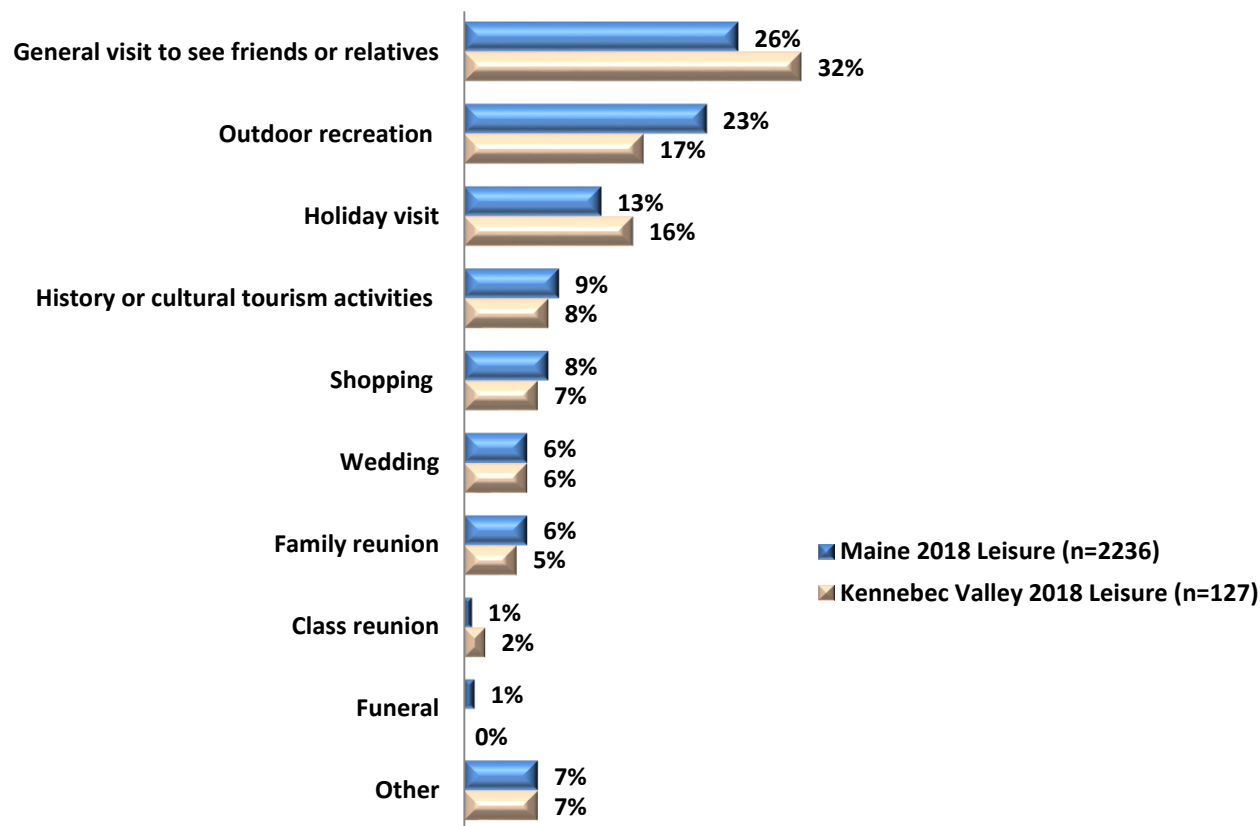
<> indicates a significant difference between this region and the State at the 95% confidence level.

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.*

Seeing friends or family was the most common purpose of overnight leisure trips to the Kennebec Valley, followed by outdoor recreation and holiday trips.

### PRIMARY PURPOSE OF OVERNIGHT LEISURE TRIPS



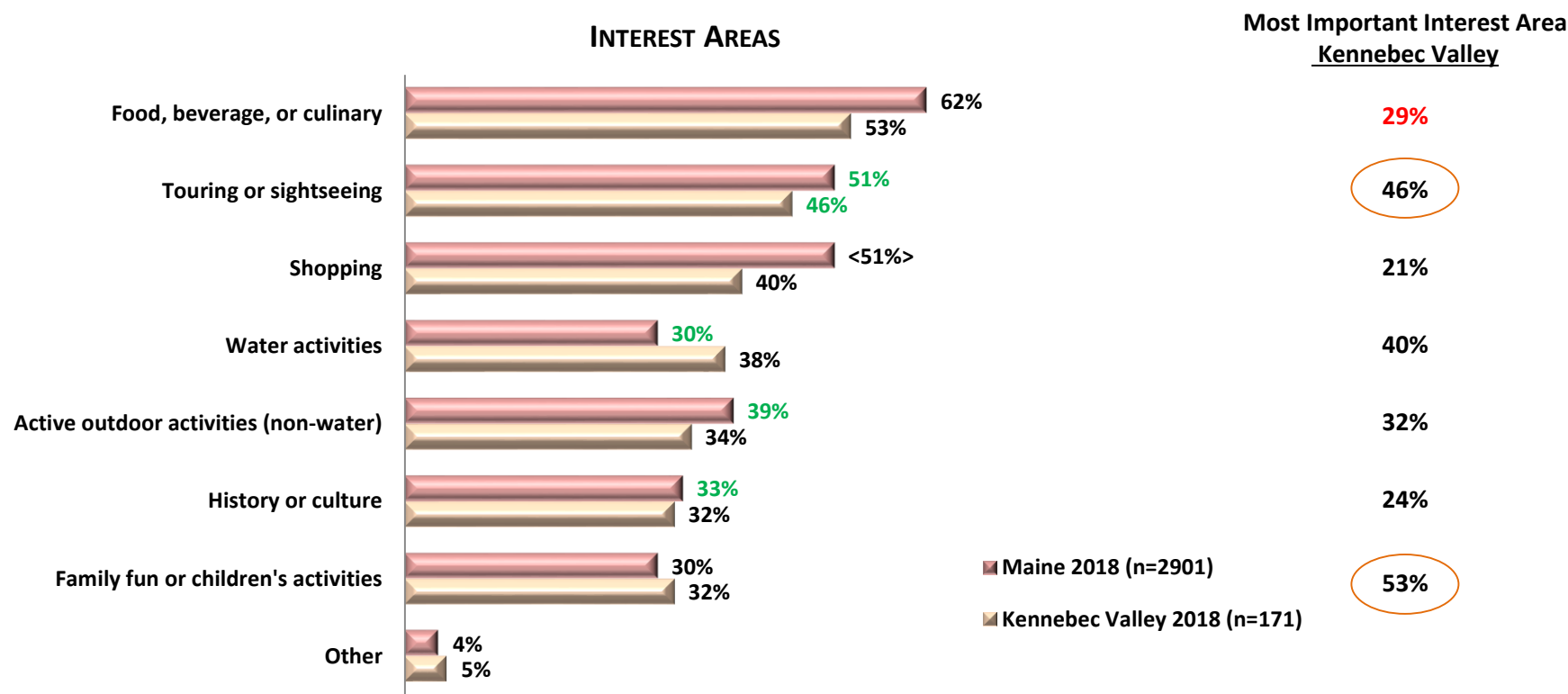
Q9. What was the primary purpose of your most recent leisure trip in Maine?

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



By a slight margin, culinary pursuits and sightseeing were the *most common* interests of overnight visitors to the Kennebec Valley. By a wider margin, family fun and sightseeing were the most likely to be the *most important* interests.

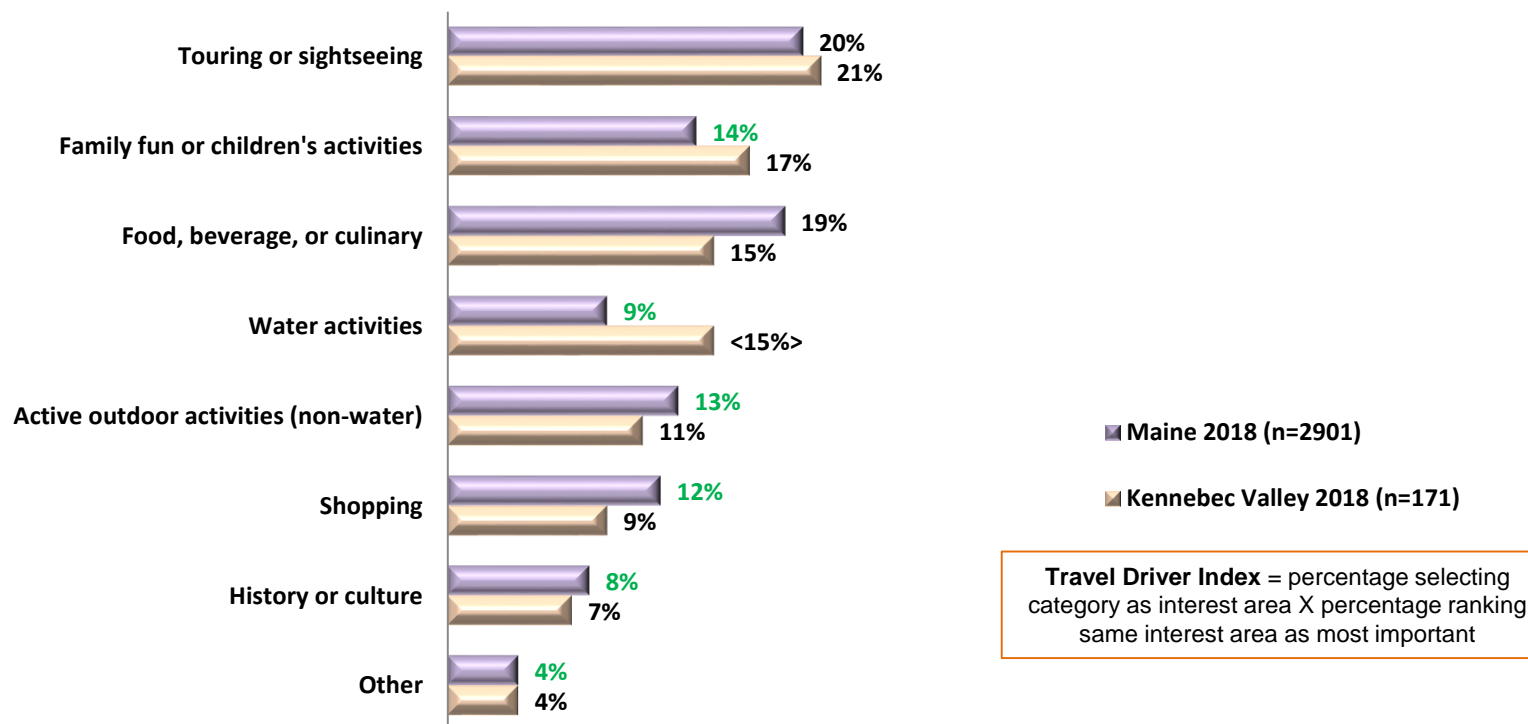
➤ Overnight visitors to the region were less likely than those to the state as a whole to express an interest in shopping.



An index that combines interest and importance shows that sightseeing, family fun, culinary activities, and water activities were the most influential drivers of overnight visits to the Kennebec Valley.

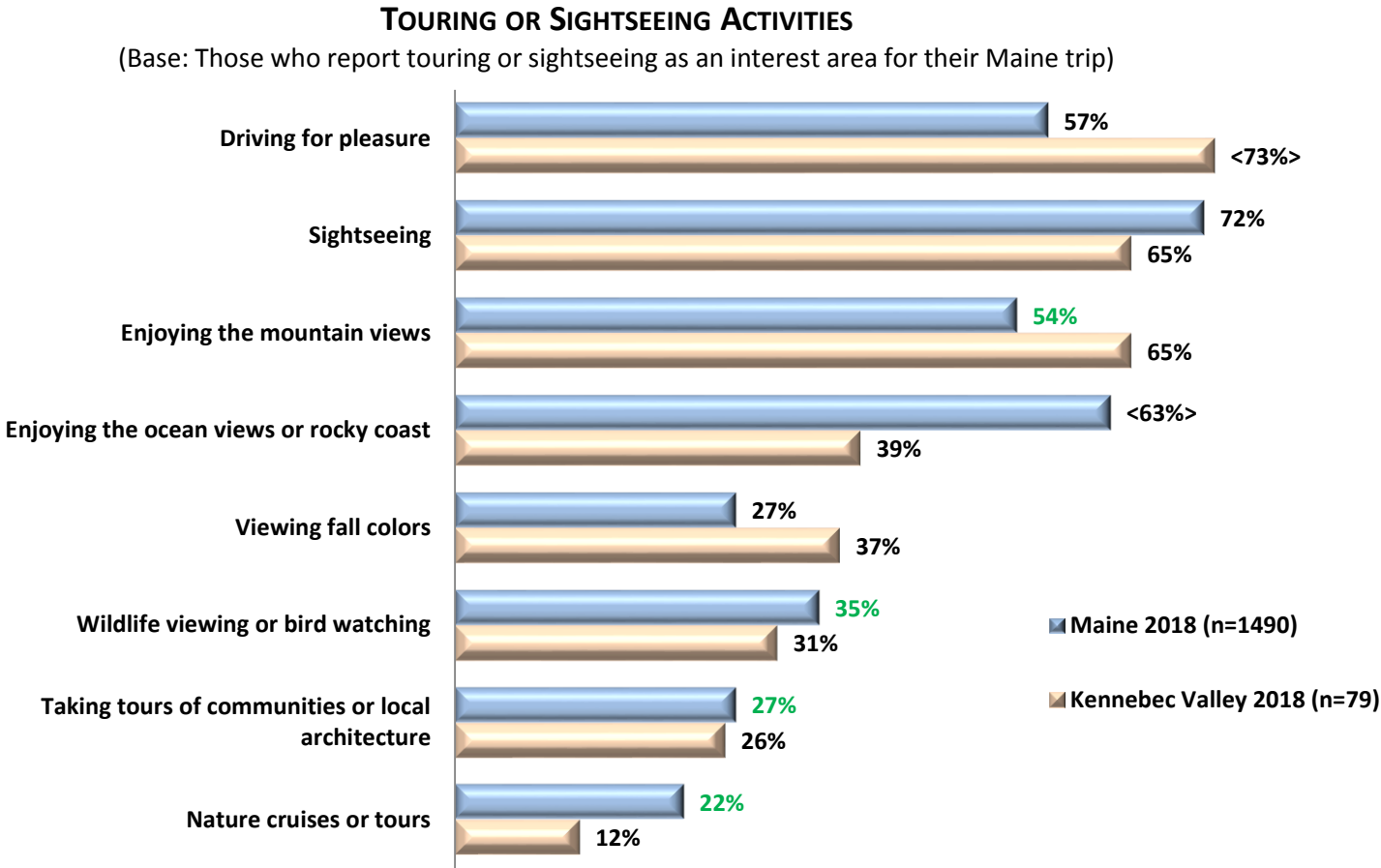
- Compared to such trips statewide, overnight trips to the Kennebec Valley region were more likely to be driven by water activities.

### Travel Driver Index



The most common sightseeing activities for overnight visitors to the Kennebec Valley – by far – included going for a pleasure drive, sightseeing generally, and enjoying the mountain views.

- Overnight visitors to the region were more likely than those statewide to go for a pleasure drive, but were less likely to enjoy coastal/ocean views.

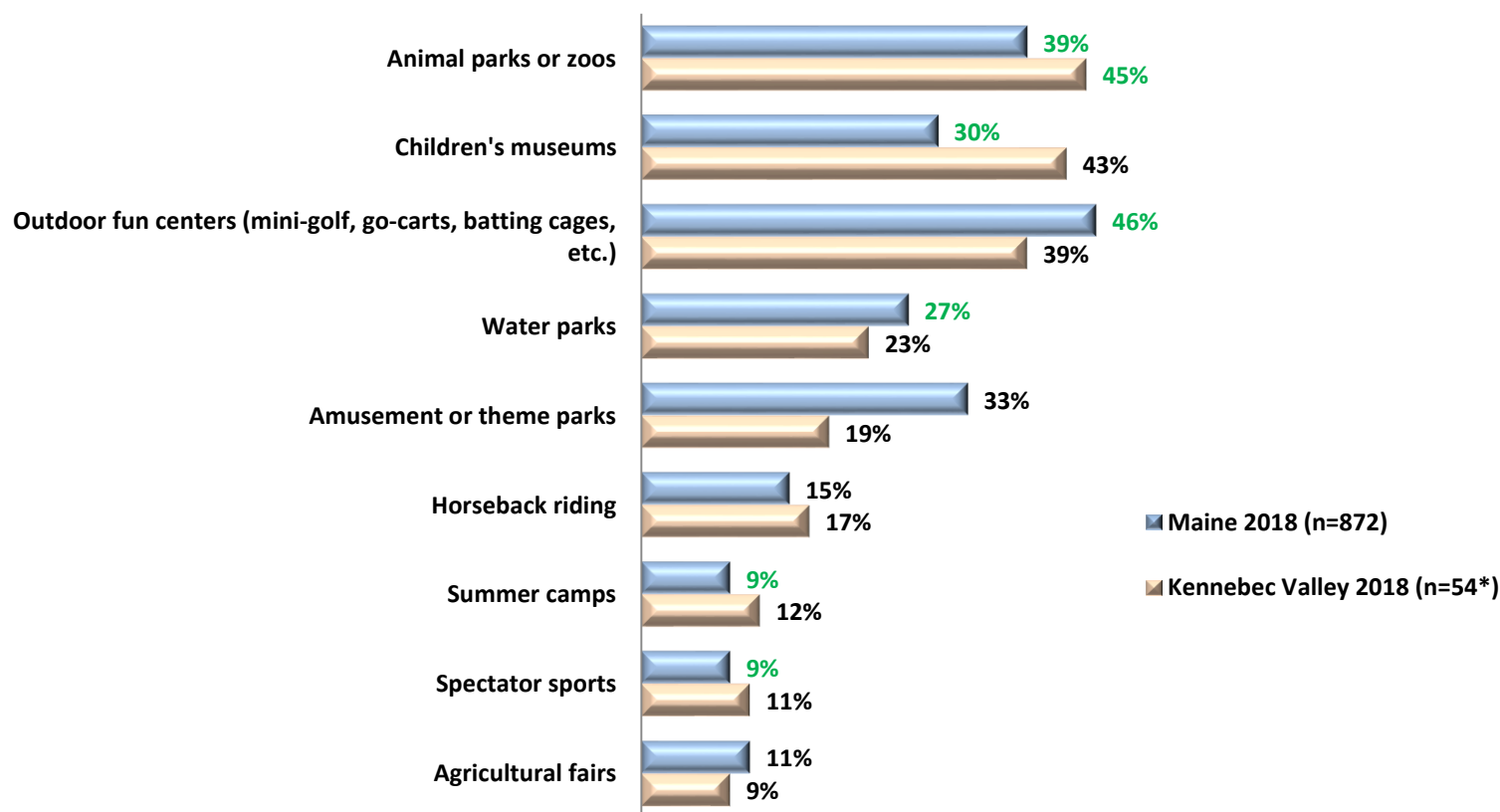


The most common family fun or children's activities in the region were visiting animal parks, going to children's museums, and going to outdoor fun centers.

- Regional visitors were much more likely to go to an animal park or zoo in 2018 (45%) than in 2017 (21%).

### 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.

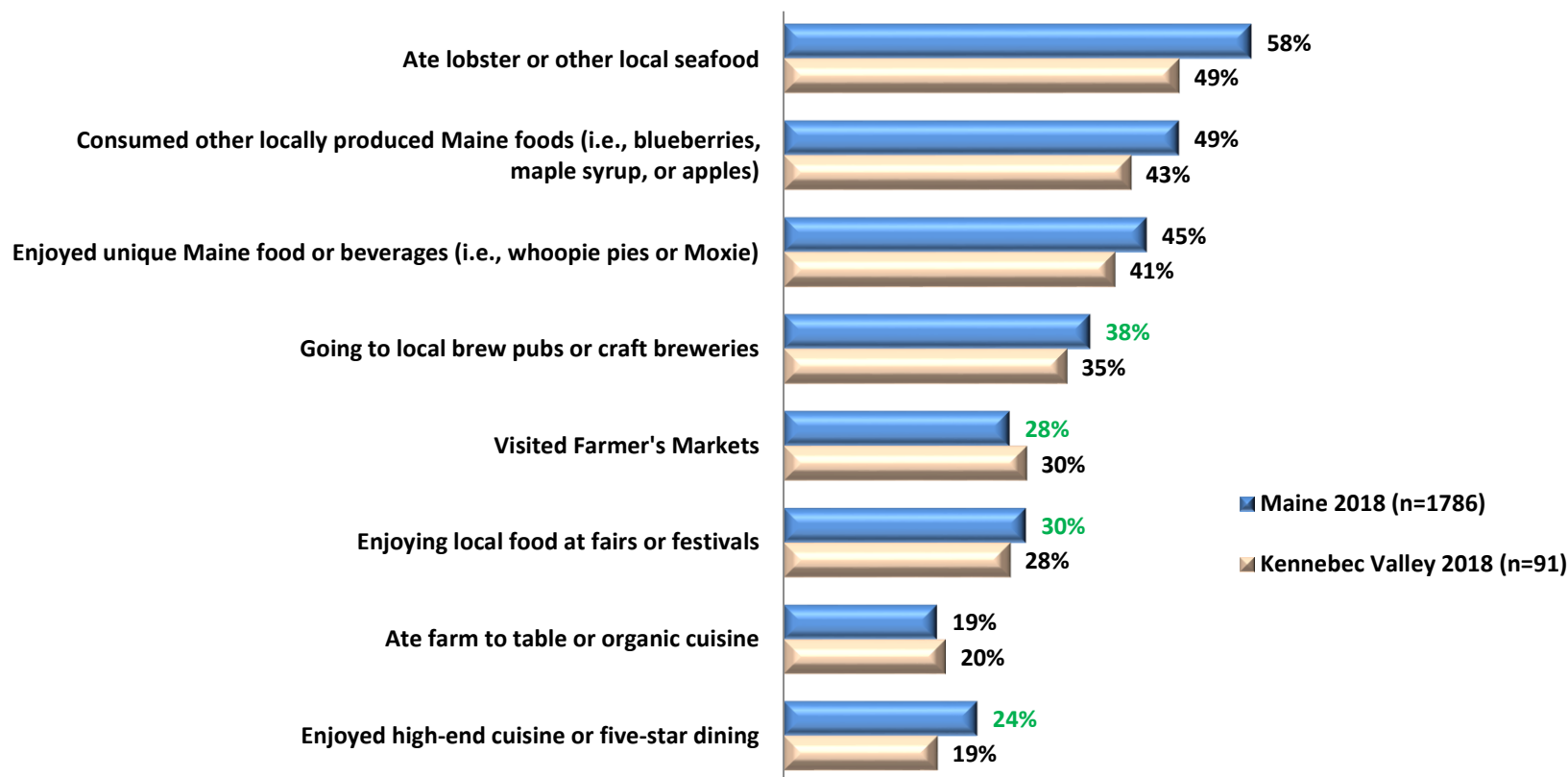
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Eating seafood was the most common culinary activity among overnight visitors to the region in 2018, though many consume other local or unique Maine foods.

### FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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



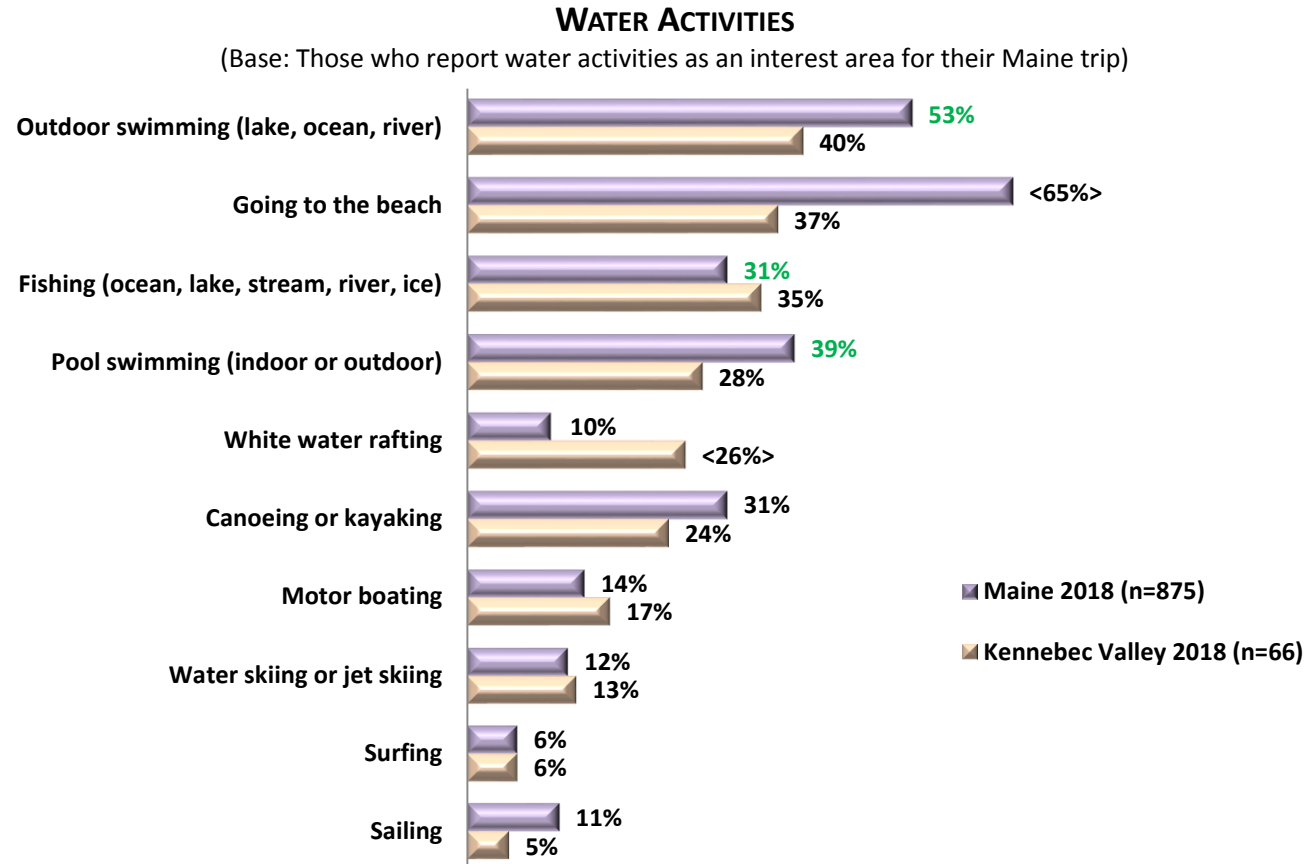
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

A variety of water activities were popular on overnight trips to the region. Swimming outdoors, going to the beach, and fishing were most common, followed by swimming in pools, white water rafting, and canoeing or kayaking.

- While going to the beach was less common on trips to the region than on trips statewide, white water rafting was more common.



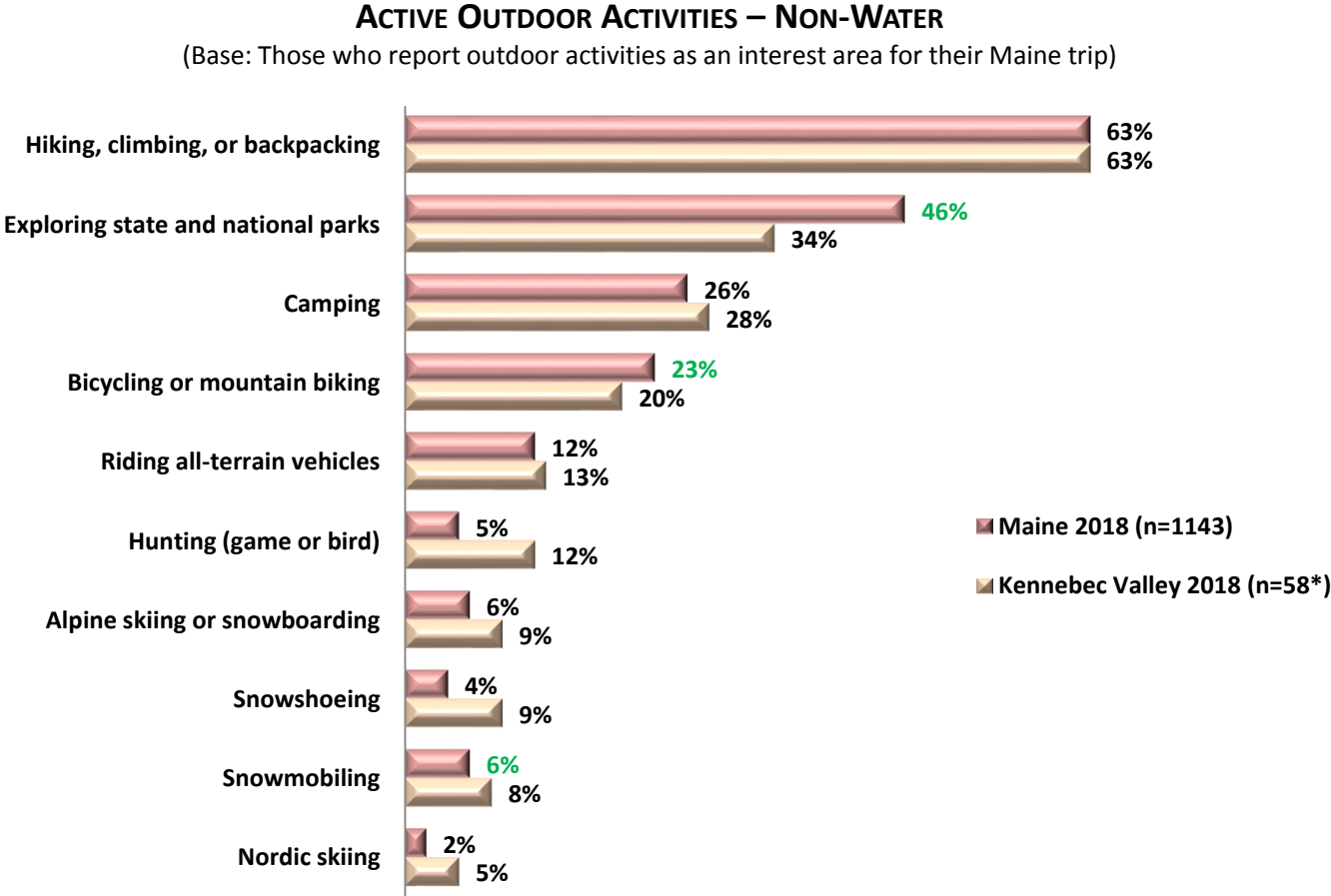
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

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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.



By a wide margin, hiking and related activities were the most common active outdoor pursuits in the region, though many overnight visitors explored public parks, went camping, or went biking.

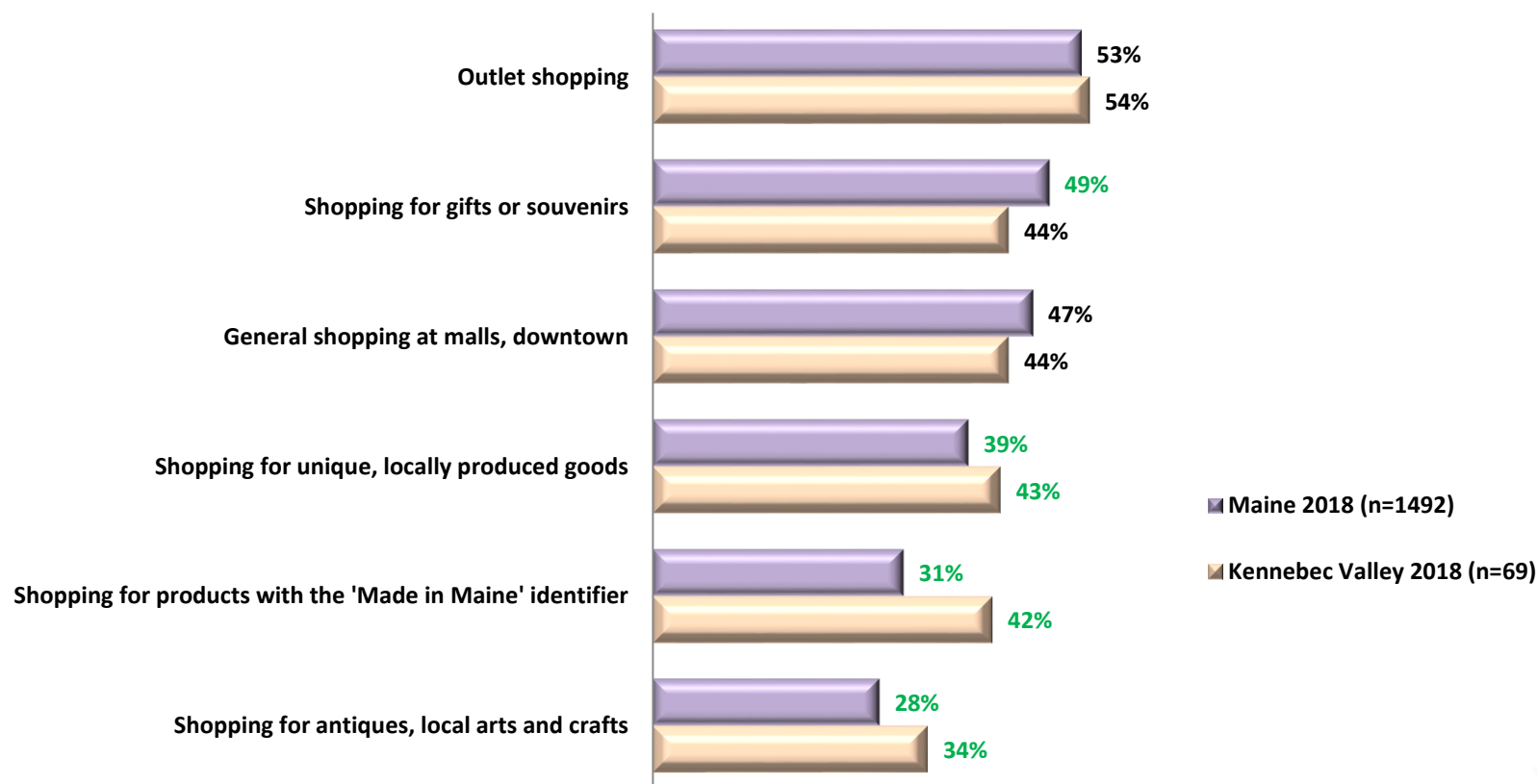


# Overnight travelers in the region shopped in a variety of venues and for a variety of goods, as many forms of shopping were equally popular.

- Compared to 2017, in 2018 shoppers in both the region and the state as a whole were more likely to shop for unique or local goods, made-in-Maine goods, and antiques or arts and craft items.

## 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.

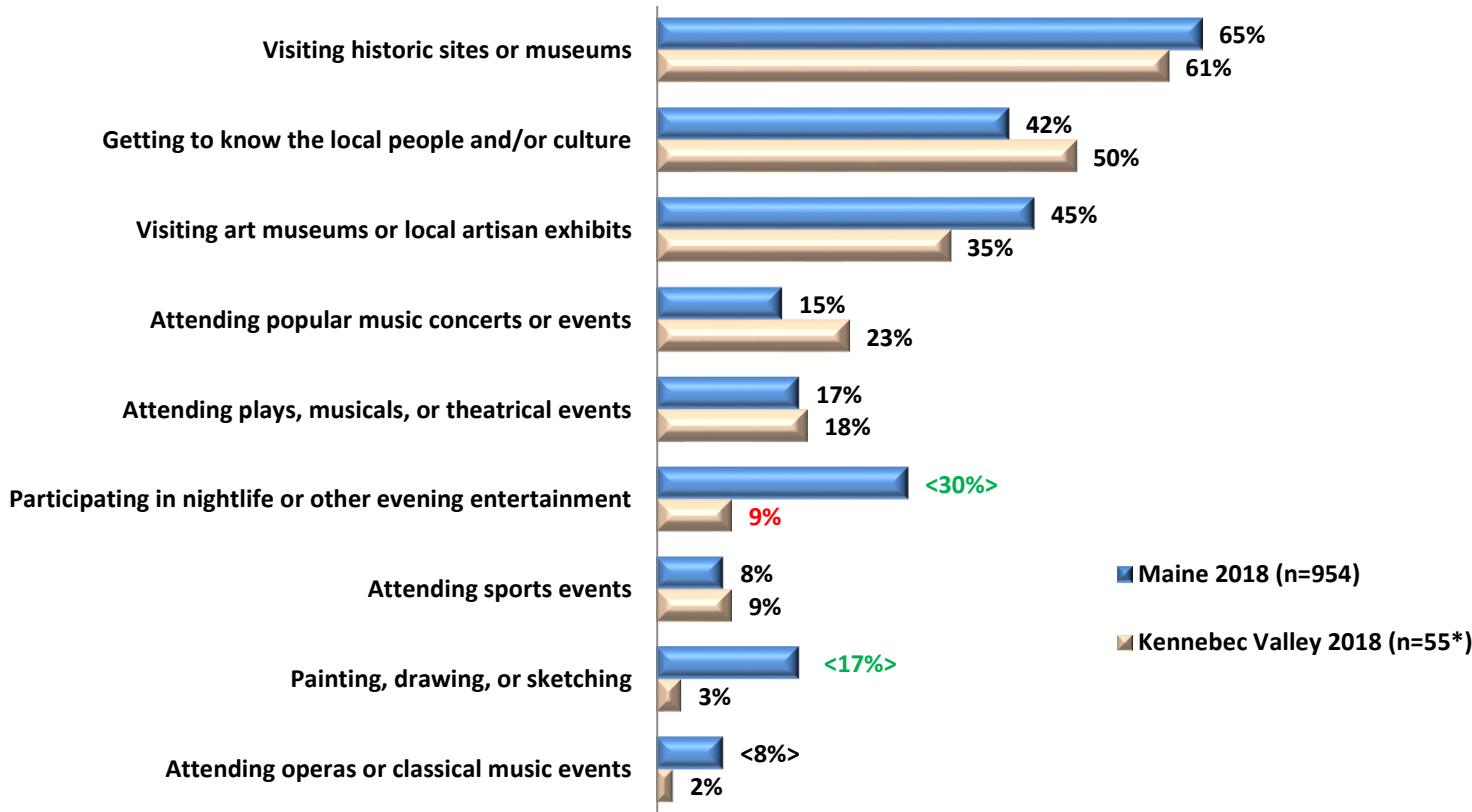
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Visiting historic sites or museums was the most popular cultural activity in the region, followed by getting to know the people and culture and, more distantly, visiting art displays.

- Evening entertainment and creating art were much less popular among the region’s overnight visitors than among overnight visitors statewide.

HISTORY OR CULTURE ACTIVITIES

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



The Kennebec Rail Trail and Belgrade Lakes were the most popular destinations for overnight visitors to the Kennebec Valley in 2018.

% VISITING			
Top Destinations		Less Popular Destinations*	
25%	Kennebec Rail Trail	9%	Coburn Mountain
22%	Belgrade Lakes	8%	Maine Film Center
15%	The Forks	8%	Waterville Opera House
14%	Maine State Museum	8%	Moxie Falls
14%	Capitol Building	8%	Colby College Museum of Art
11%	Maine Beer Trail	7%	Colburn House State Historic Site
		6%	Old Canada Road Scenic Byway
		6%	Museum in the Streets, Hallowell
		6%	Theater at Monmouth
		5%	Lakewood Theatre
		5%	Blaine House
		5%	Old Fort Western
		5%	L.C. Bates Museum

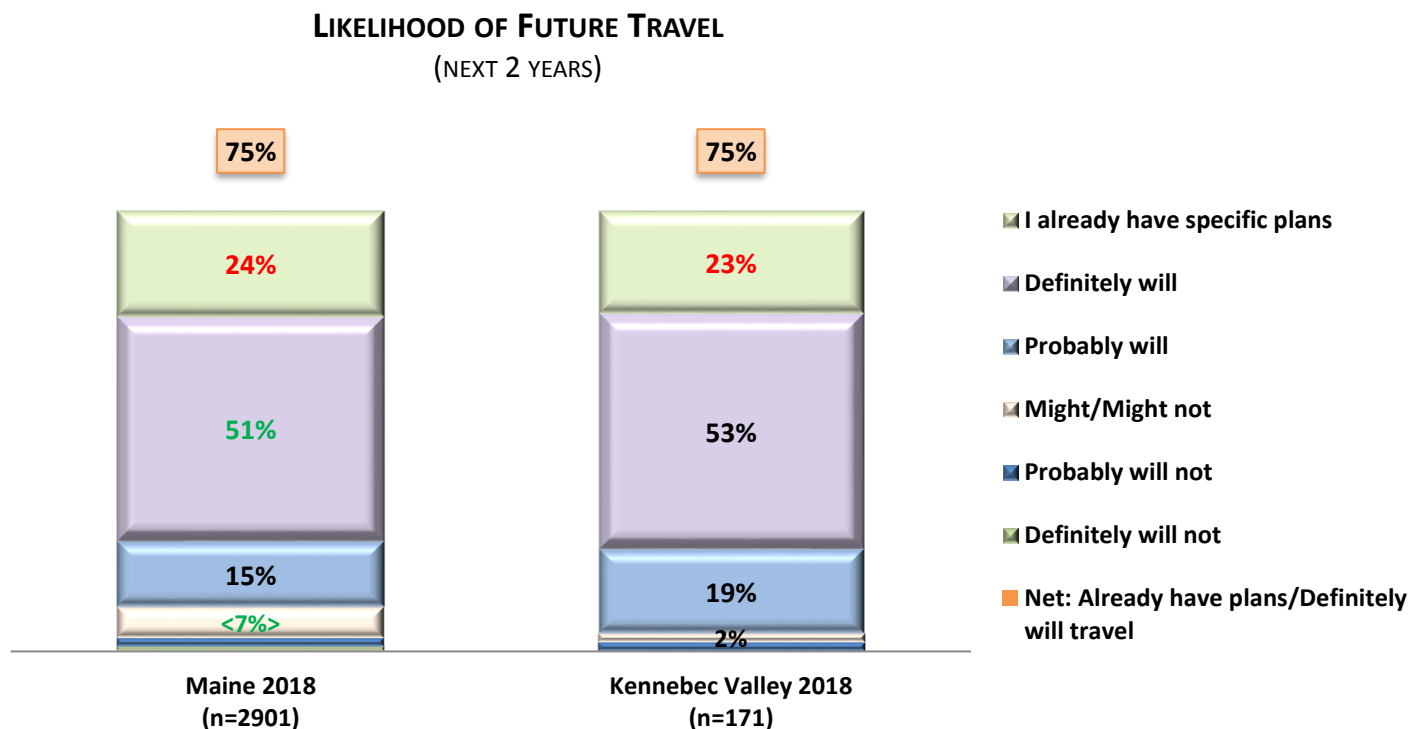
*\* Does not include options selected by fewer than 5% of surveyed visitors.*

(n=171)

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.

Three-quarters of overnight visitors to the Kennebec Valley have already made plans or definitely plan to travel in Maine again within the next two years.



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







# Visitor Profile

## Day Visitor Demographics

- The average surveyed day visitor to the Kennebec Valley in 2018 was 43 years old and had an income of \$54,000.
- About half had a college degree or were employed full-time. Four out of ten were married.
- Compared to such visitors statewide, day travelers to the region had a lower average income, but were otherwise similar demographically.

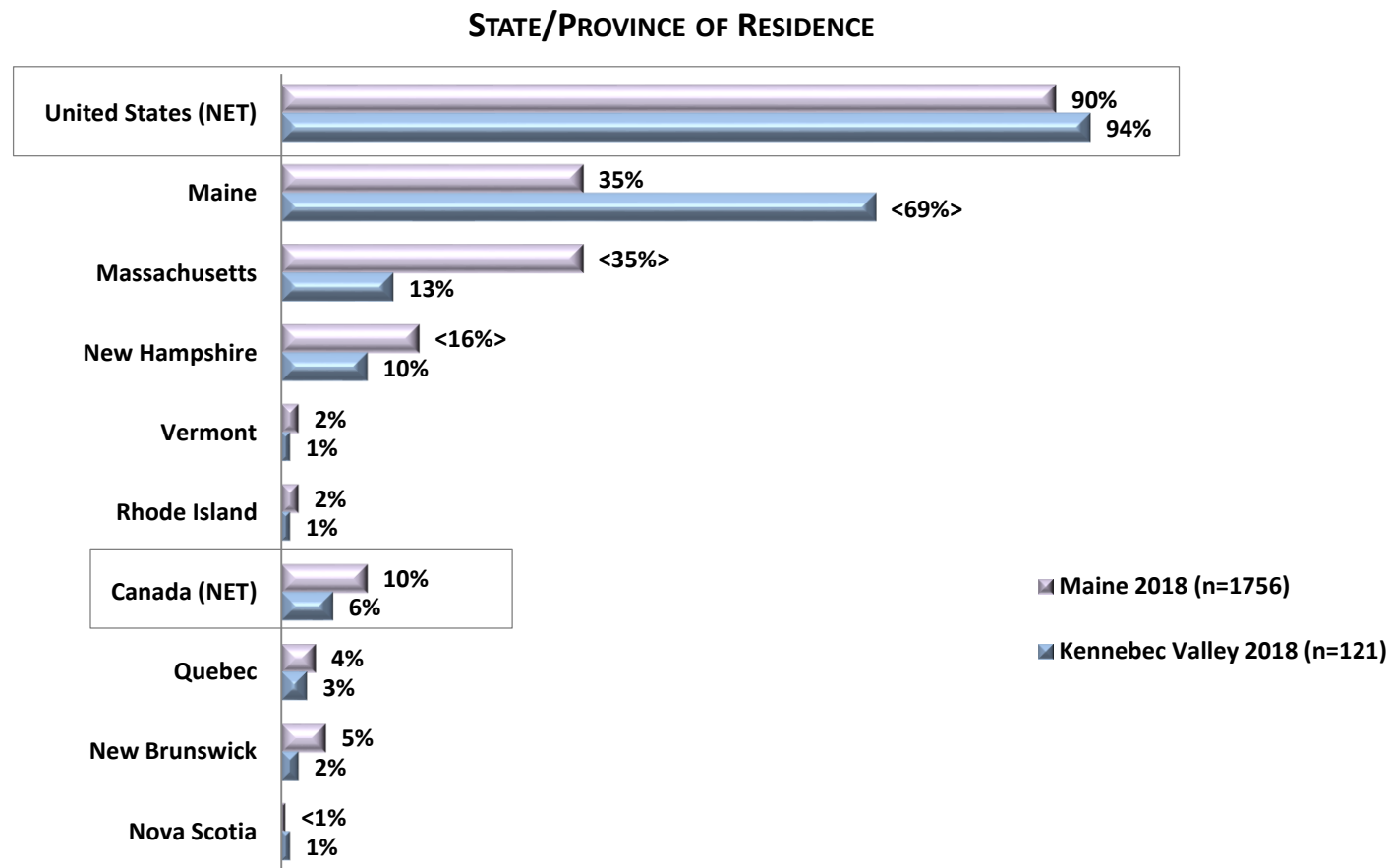
	Maine 2018 (n=1756)	Kennebec Valley 2018 (n=121)
<b>Age:</b>		
< 35	37%	41%
35 - 44	18%	20%
45 - 54	16%	9%
55 +	28%	30%
Mean	43.0	42.9
<b>Income:</b>		
< \$50,000	38%	<65%>
\$50,000 - \$99,999	<39%>	26%
\$100,000 +	<22%>	9%
Mean	<\$74,100>	\$53,700
<b>Female</b>	78%	80%
<b>College degree or higher</b>	58%	53%
<b>Married</b>	49%	41%
<b>Employed full-time</b>	49%	48%

<> 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.

## Seven out of ten surveyed day trippers to the Kennebec Valley in 2018 were from Maine.

- Day visitors to the region were much more likely than day visitors statewide to be from Maine, and were less likely to be from Massachusetts or New Hampshire.

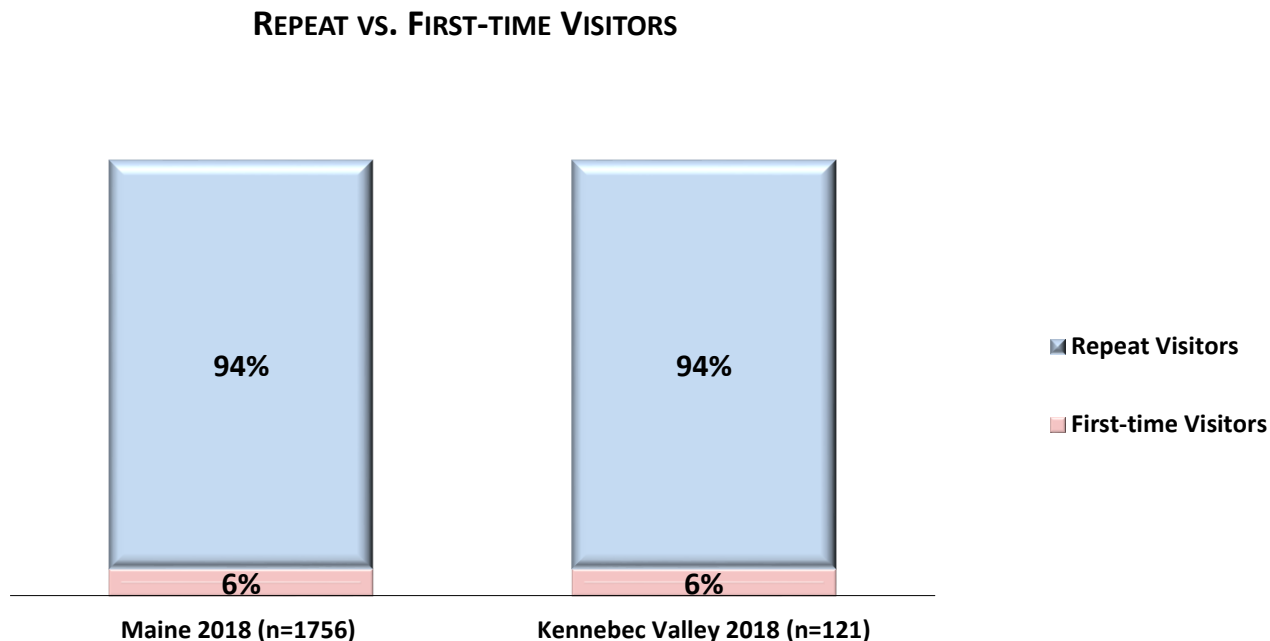


Q2. In what state or province do you reside?

<> 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.

As was seen statewide, at least nine out of ten day visitors to the region in 2018 had traveled to or within Maine before.

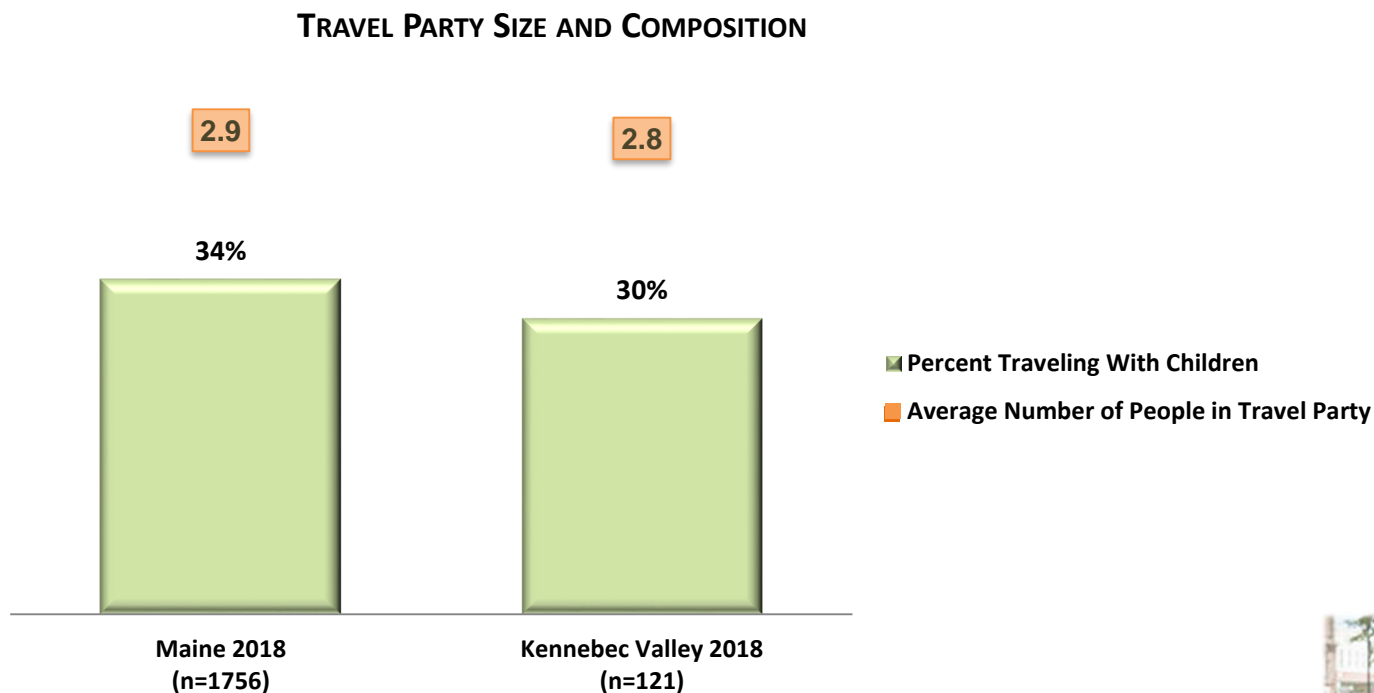


Q10. Was this your first trip to Maine?

<> 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.

The average travel party coming to the region for the day included about 3 people. Three out of ten were traveling with children.



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.

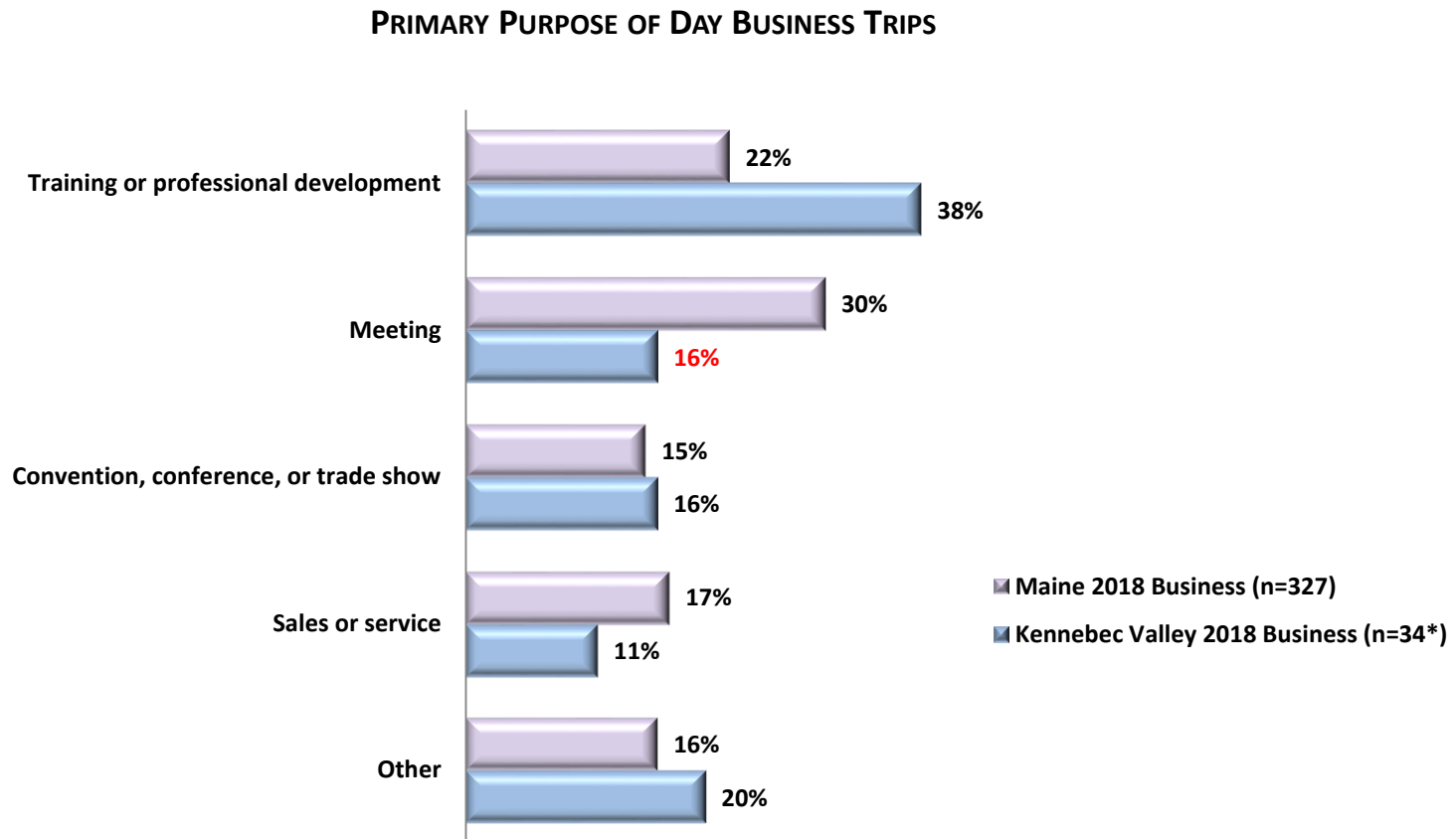
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



# Trip Experience

Sample Size Exclusions: Data for some questions are not presented on the following pages due to small sample sizes. The results not shown include: History or Culture Activities (n=15).

Training and professional development was the most common purpose of business day trips to the region.



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.

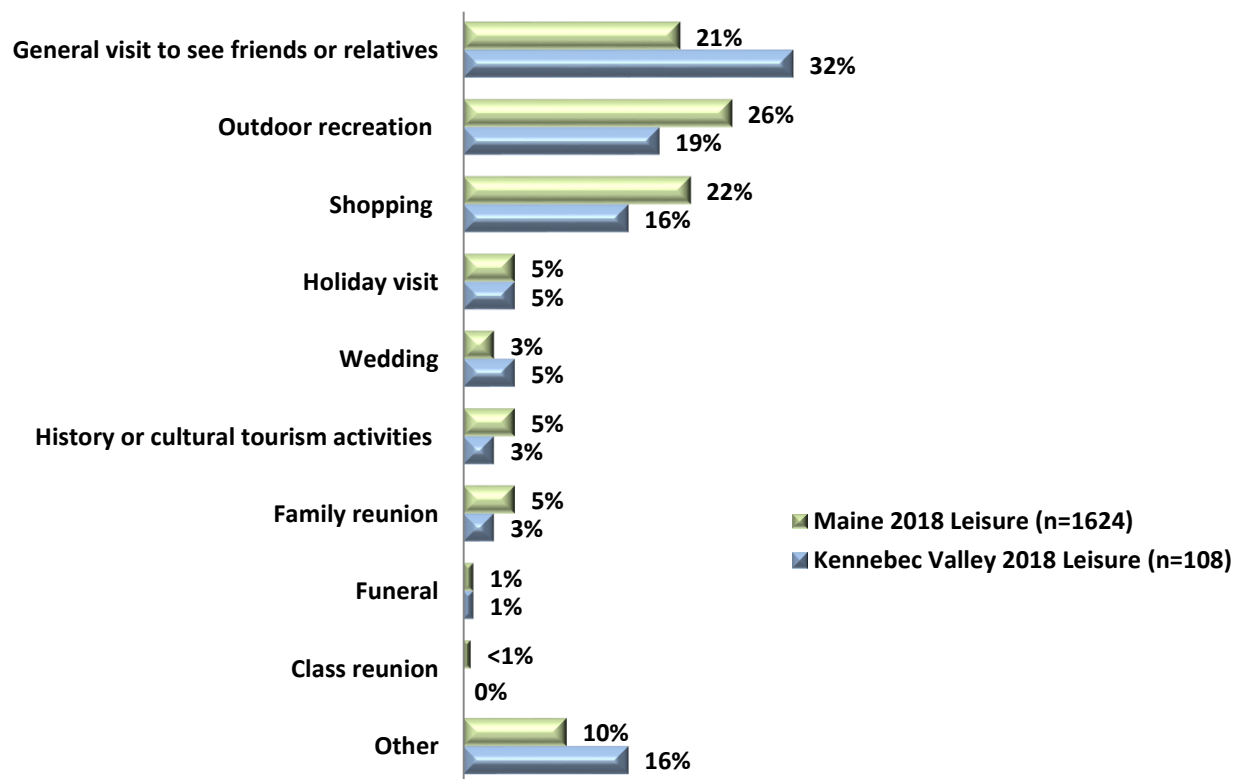
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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



Seeing friends or relatives was the most common primary reason for leisure trips to the region, followed by outdoor recreation and shopping.

### PRIMARY PURPOSE OF DAY LEISURE TRIPS



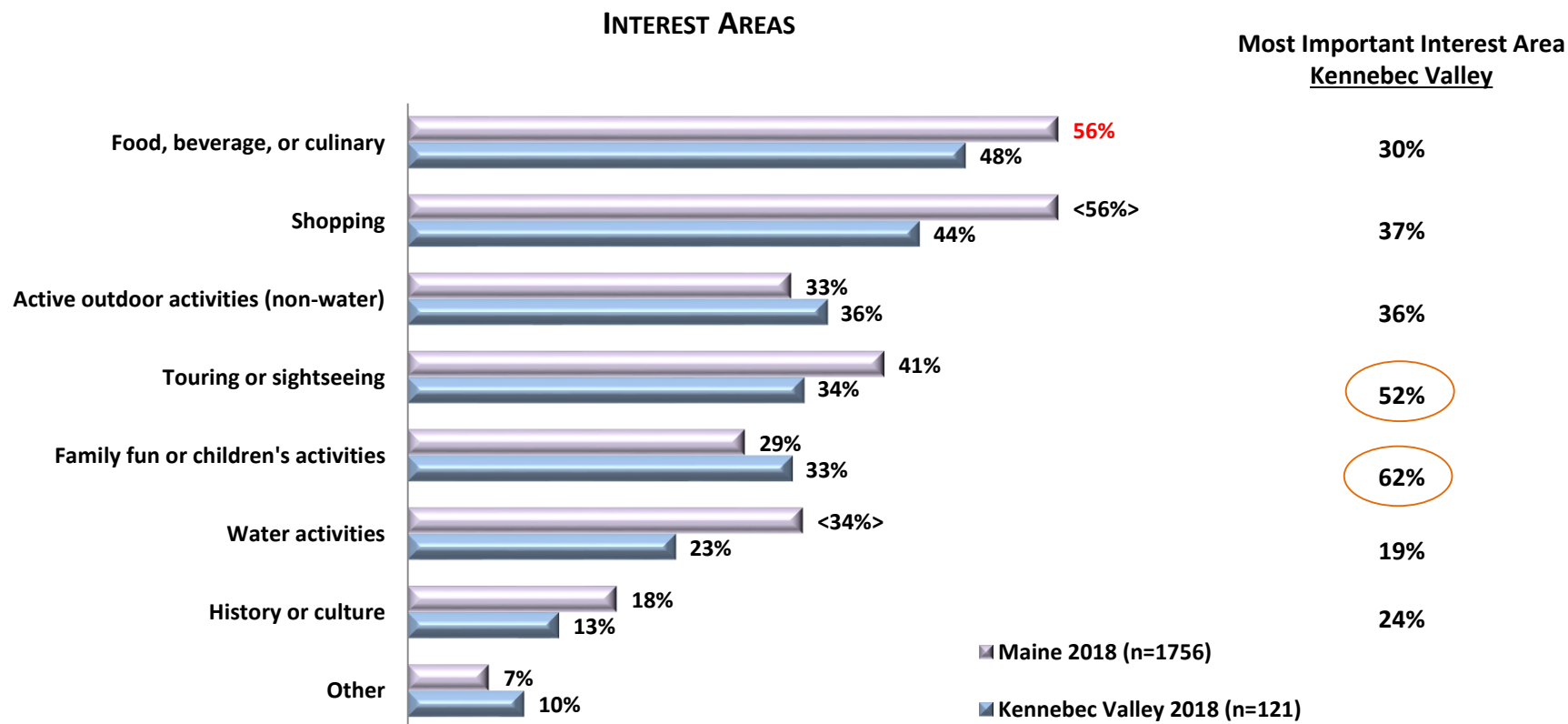
Q9. What was the primary purpose of your most recent day leisure trip in Maine?

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



Culinary activities and shopping were the most common interests on day trips to the region, though active outdoor activities, sightseeing, and family fun activities were popular as well. Family fun and sightseeing were most often the *most important* interests.

- Compared to day travelers across the state as a whole, those visiting the Kennebec Valley were less likely to express an interest in shopping and water activities.



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

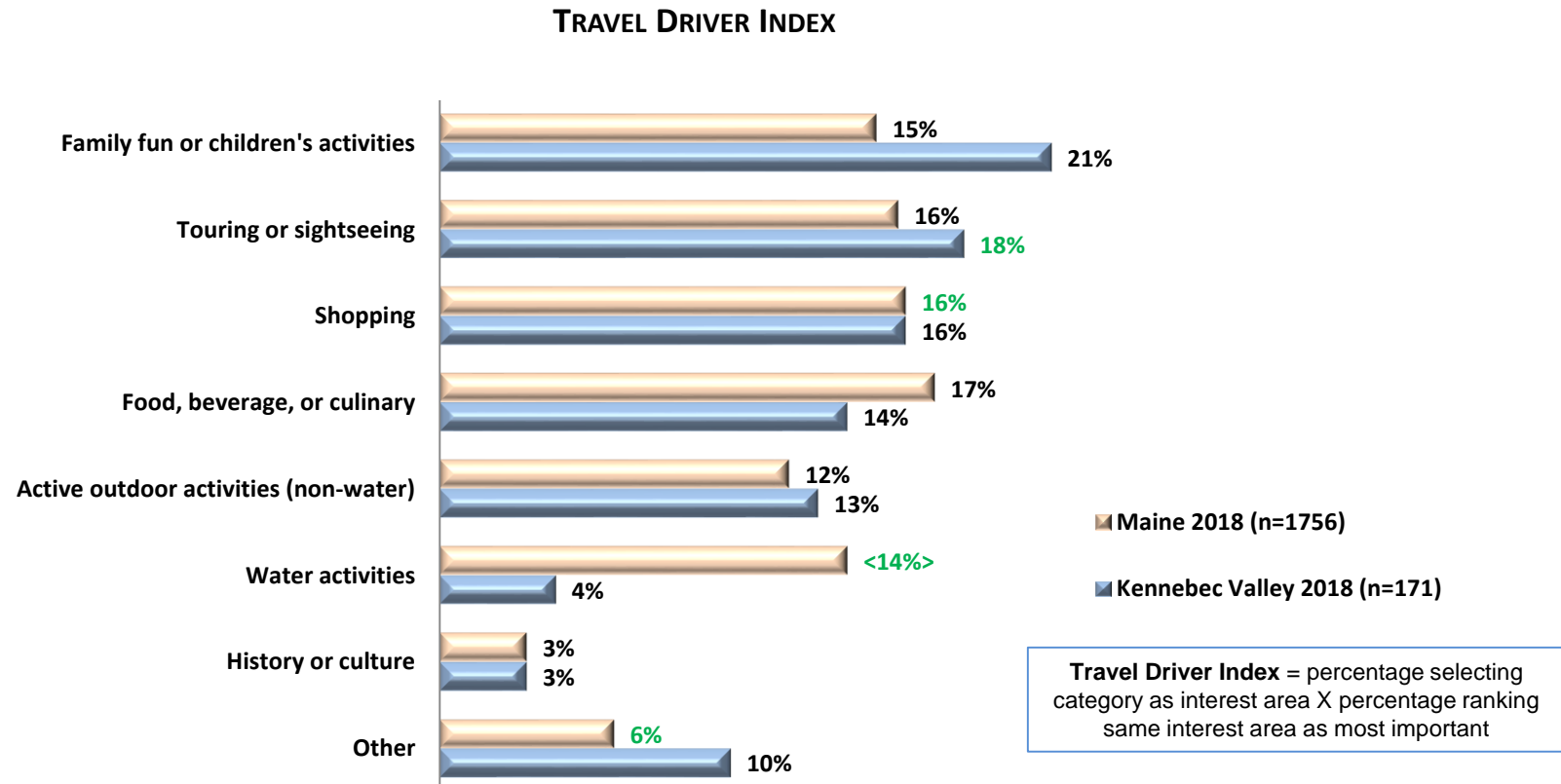
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<> 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.

Combining interest and importance shows the relative strength of family fun/children's activities in driving day travel to the region, followed closely by sightseeing, shopping, culinary interests, and outdoor activities.

- Water activities were less influential in driving day trips to the Kennebec Valley than in driving day trips to the state as a whole.



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.

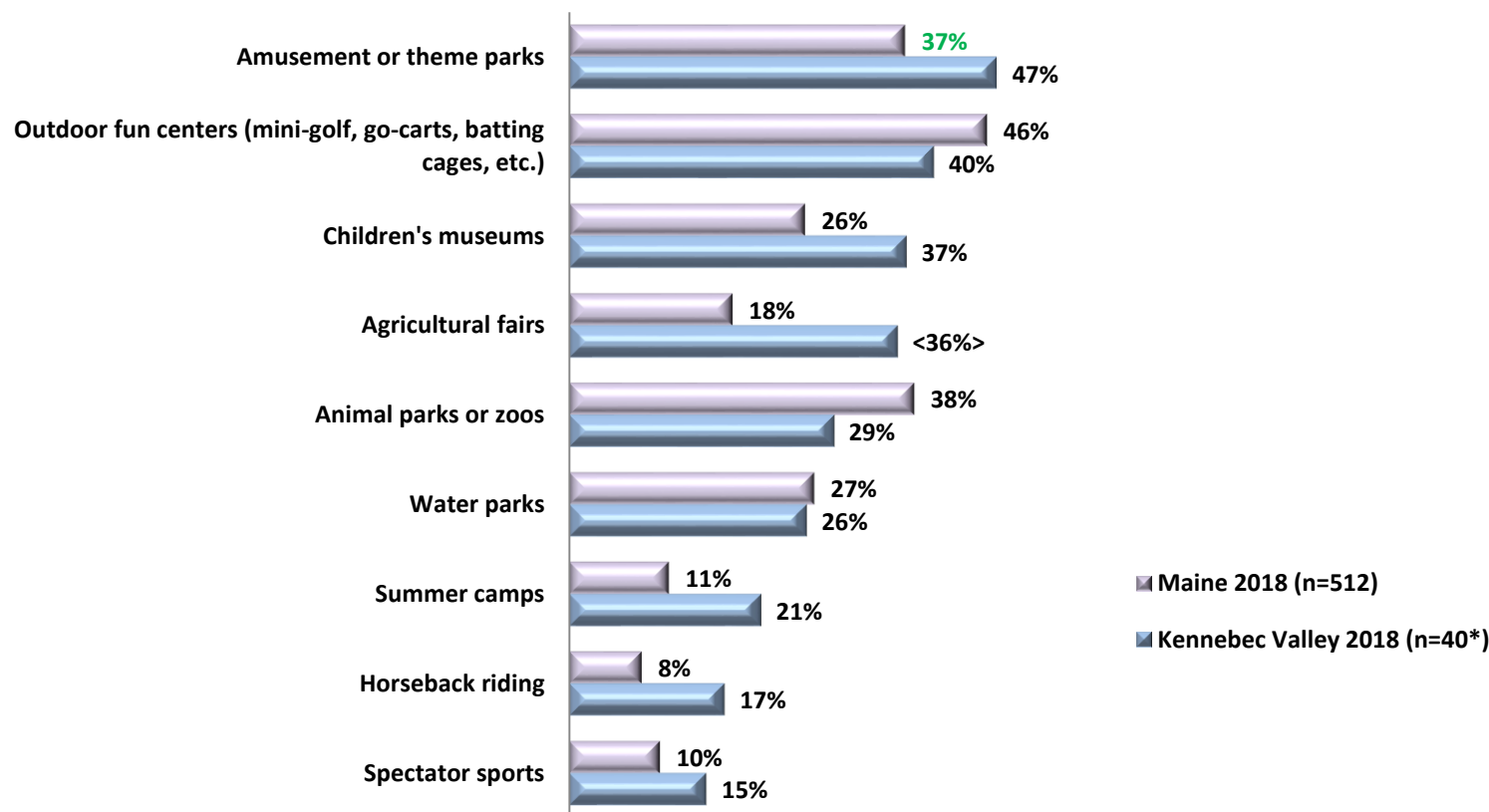
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

## Several family fun activities were about equally popular in the region.

- Day travelers to the region were more likely than those to the state as a whole to visit an agricultural fair.

### 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.

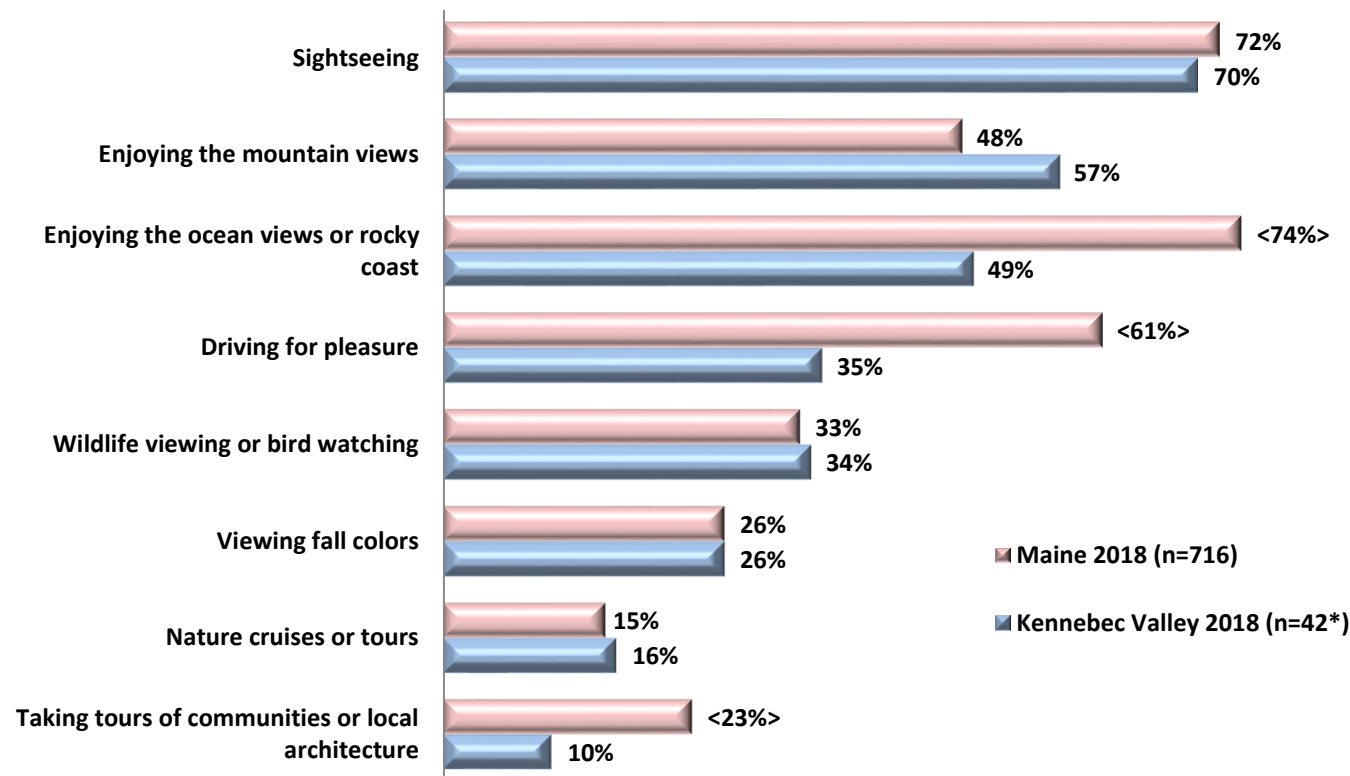
*\*Please note small sample size. Use caution when interpreting results.*

Sightseeing in general was the most common activity related to seeing the area, though many enjoyed seeing the mountains or ocean specifically.

- As might be expected, day trippers to the Kennebec Valley were less likely than day travelers statewide to enjoy ocean/costal views, go for a pleasure drive, and go on tours within communities.

### 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.

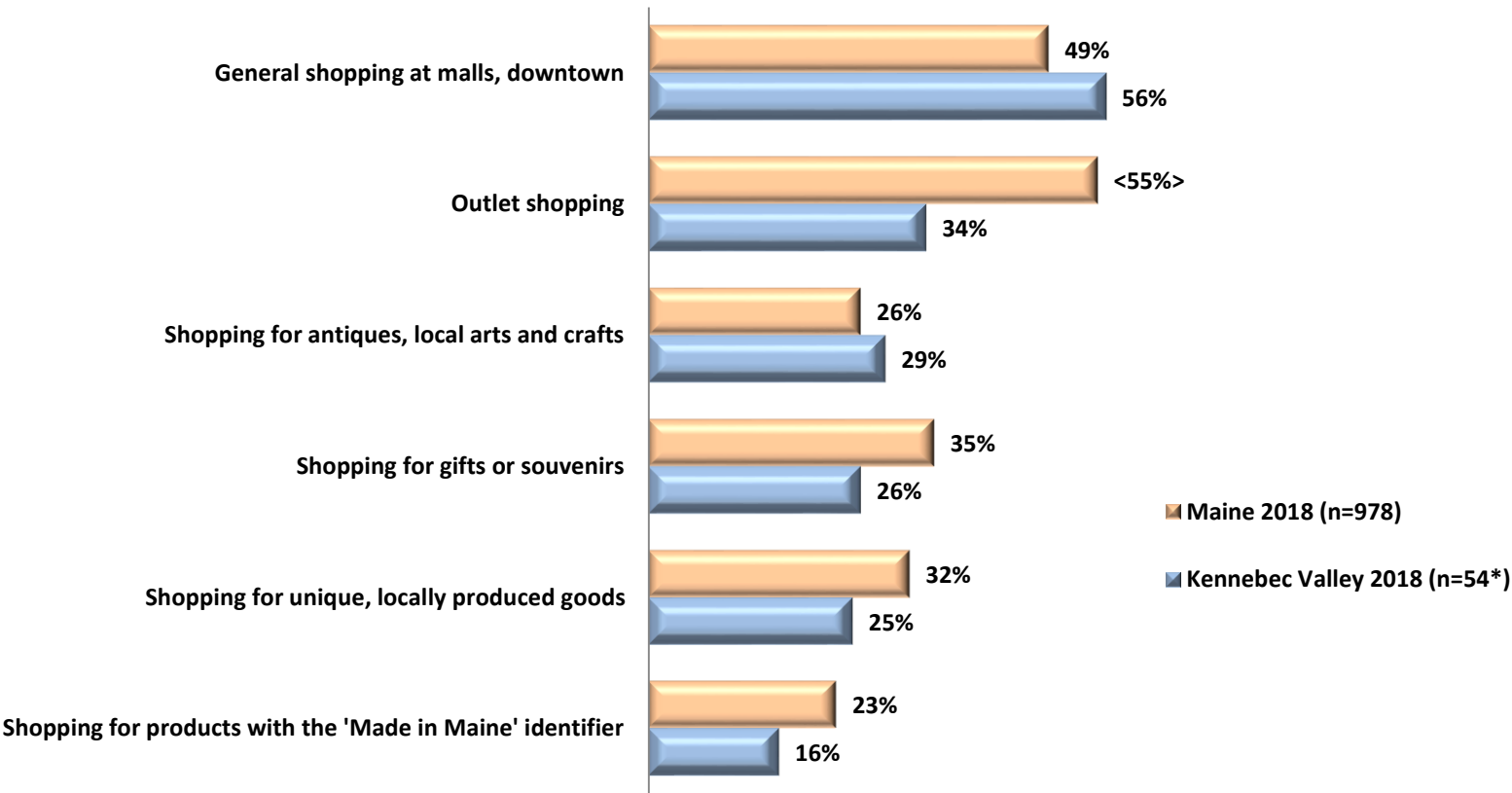
*\*Please note small sample size. Use caution when interpreting results.*

General shopping in malls or downtown areas was the most common shopping activity on day trips to the region, though many other types of shopping were also relatively popular.

- Day trippers to the Kennebec Valley were less likely than such travelers statewide to shop at outlet stores.

SHOPPING ACTIVITIES

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

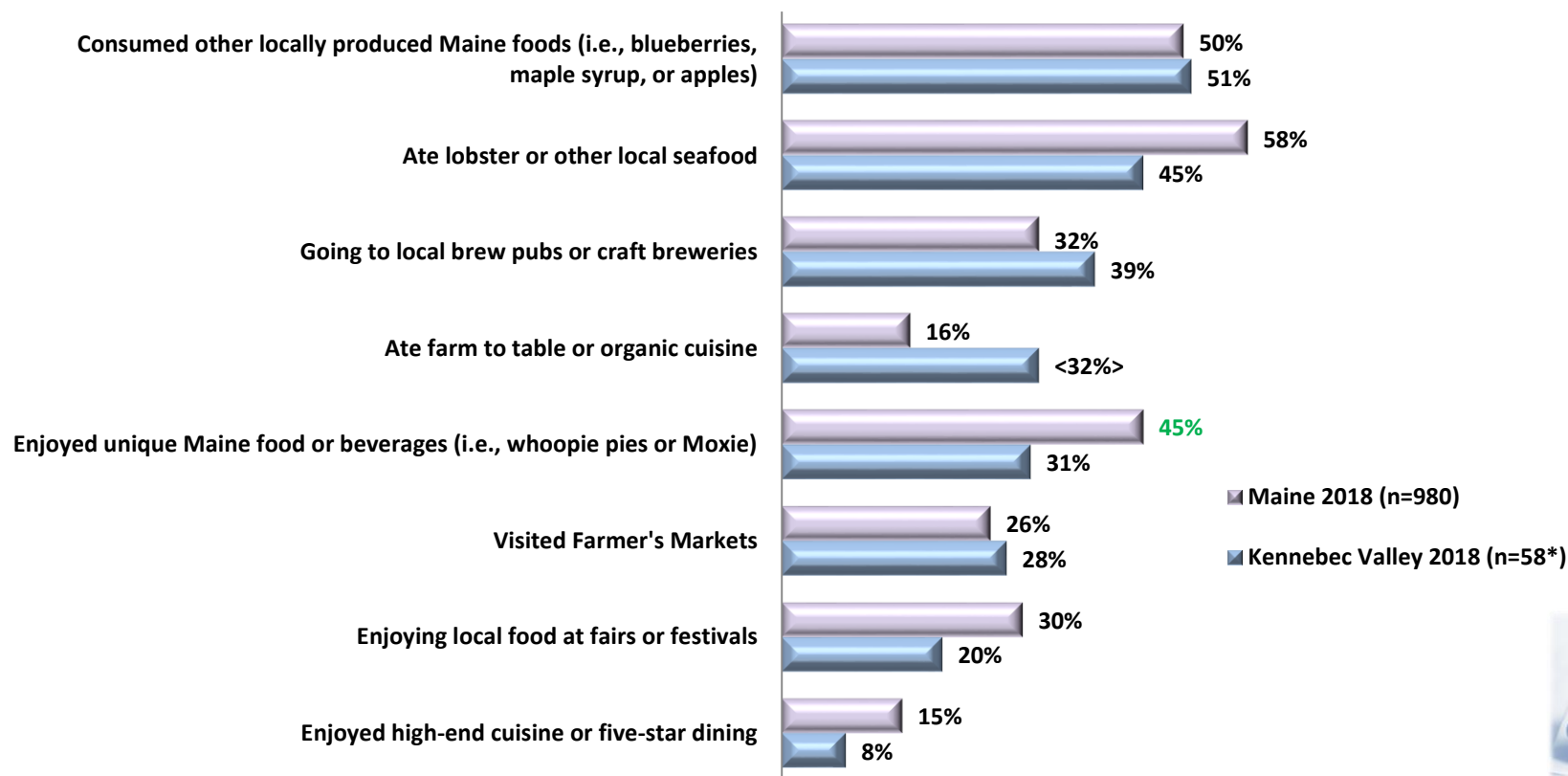


A variety of culinary activities were popular on day trips to the region, though eating local foods (including seafood and other fare) was most common.

- Day visitors to the region were more likely than those statewide to eat farm to table or organic foods during their trip.

### FOOD, BEVERAGE, OR CULINARY ACTIVITIES

(Base: Those who report food, beverage, or culinary 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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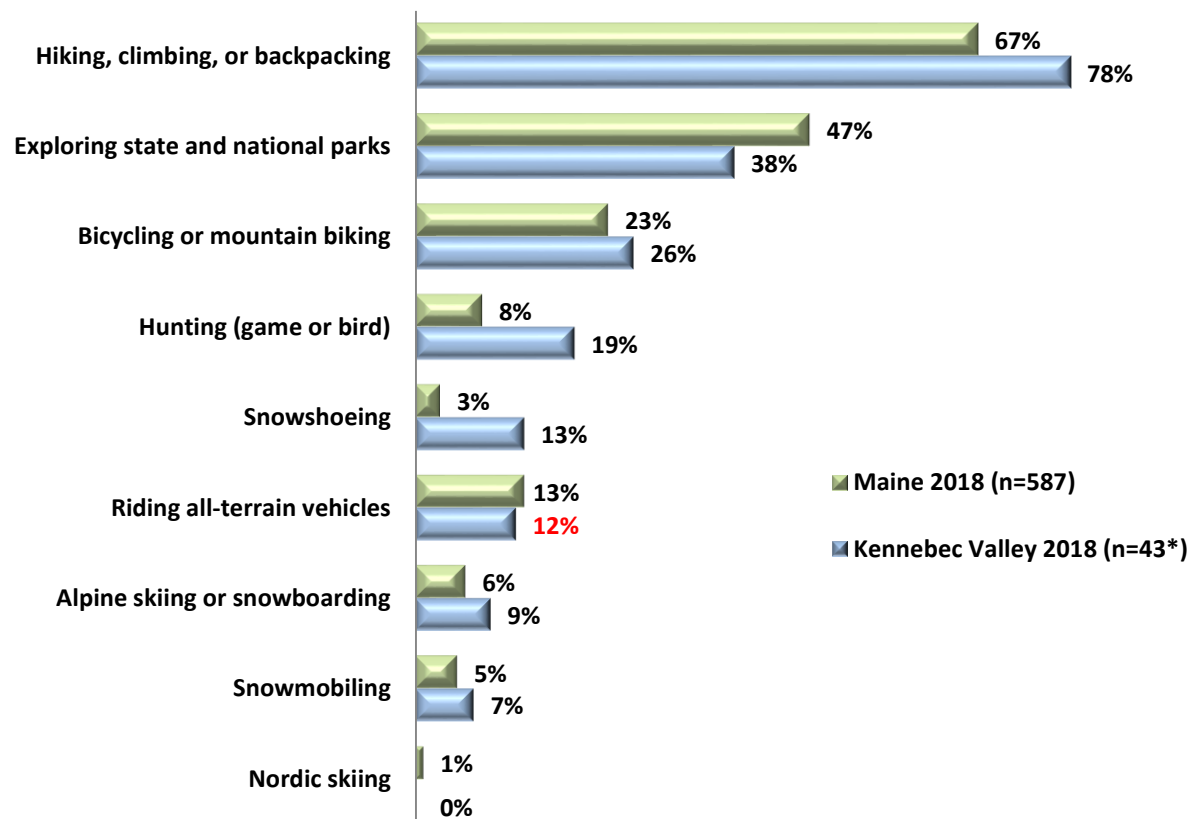
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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

Hiking and related activities were, by far, the most common active outdoor pursuits on day trips to the region.

### ACTIVE OUTDOOR ACTIVITIES – NON-WATER

(Base: Those who report outdoor non-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 this region and the State at the 95% confidence level.

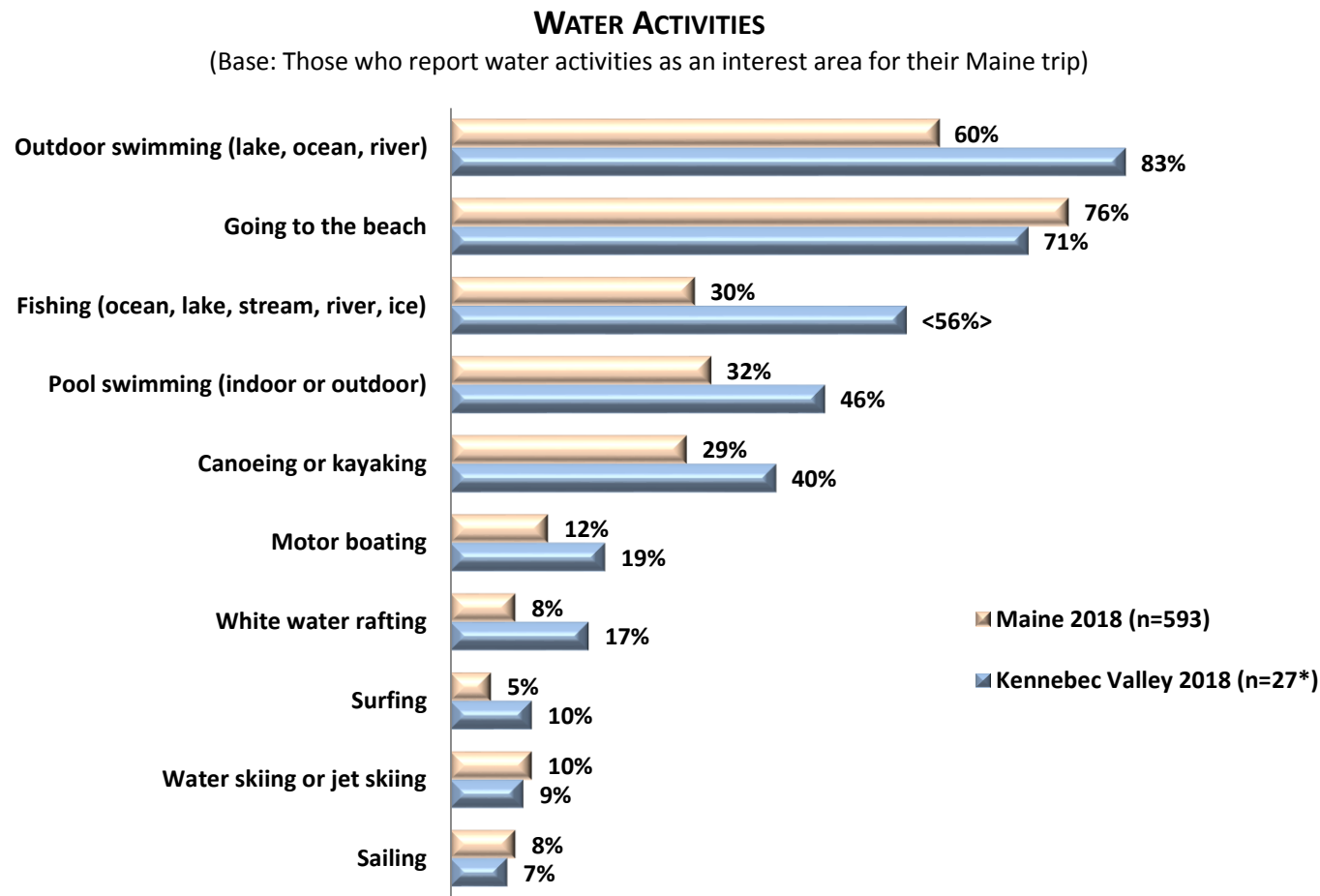
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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



Swimming outdoors and going to the beach were the most common water-based activities in the region and state, followed by fishing, pool swimming, and canoeing or kayaking.

➤ Fishing was more common on day trips to the region than on day trips statewide.



The Belgrade Lakes, Maine State Museum, and Kennebec Rail Trail were the most commonly-visited attractions in the region.

## % VISITING

Top destinations		Less popular destinations*	
26%	Belgrade Lakes	9%	Colburn House State Historic Site
23%	Maine State Museum	6%	Museum in the Streets, Hallowell
22%	Kennebec Rail Trail	6%	Colby College Museum of Art
17%	Maine Beer Trail	6%	Theater at Monmouth
14%	Old Fort Western	6%	Coburn Mountain
13%	Waterville Opera House		
11%	Capitol Building		
11%	Moxie Falls		
10%	The Forks		

\* Does not include options selected by fewer than 5% of responding visitors.

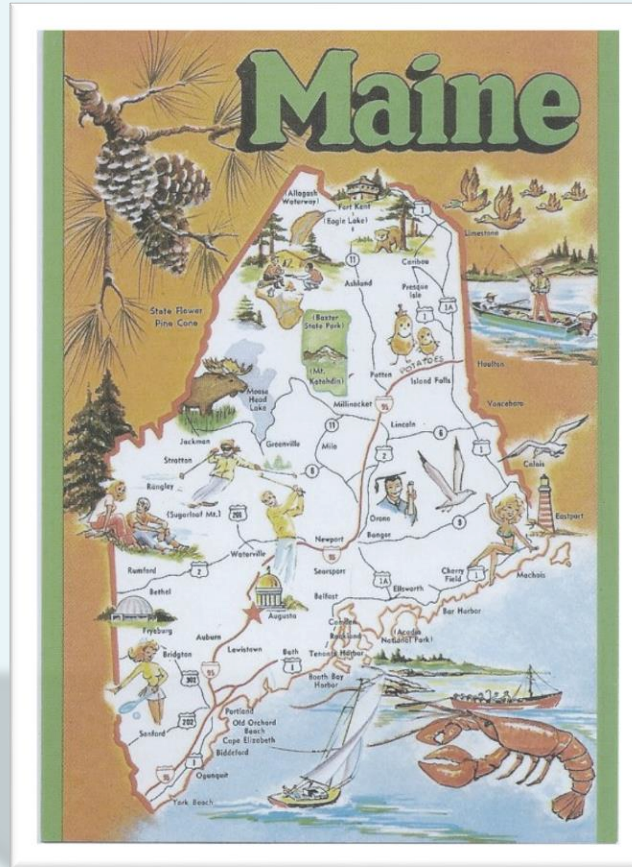
(n=121)

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.

# Research Objectives and Methodology



# Research Objectives and Instruments

Three distinct online surveys are used to achieve 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

- 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

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

## Survey Fielding

- Survey results were collected during calendar year 2018, for travel to Maine occurring from December of 2017 through November of 2018. The number of respondents participating for the statewide survey is:

Research Component	2018 Completed Surveys
Overnight Visitor Survey	2,901
Day Visitor Survey	1,756
National Travel Survey	20,579



172 Commercial Street  
Portland, ME 04101  
207.985.7660  
[www.digitalresearch.com](http://www.digitalresearch.com)