Maine Office of Tourism

Visitor Tracking Research

2018 Calendar Year Annual Report

Regional Insights:

Maine Lakes & Mountains

Prepared by

dpa
providing direction
in travel & tourism
A Division of DRI

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Regional Insights:
Maine Lakes & Mountains

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Introduction

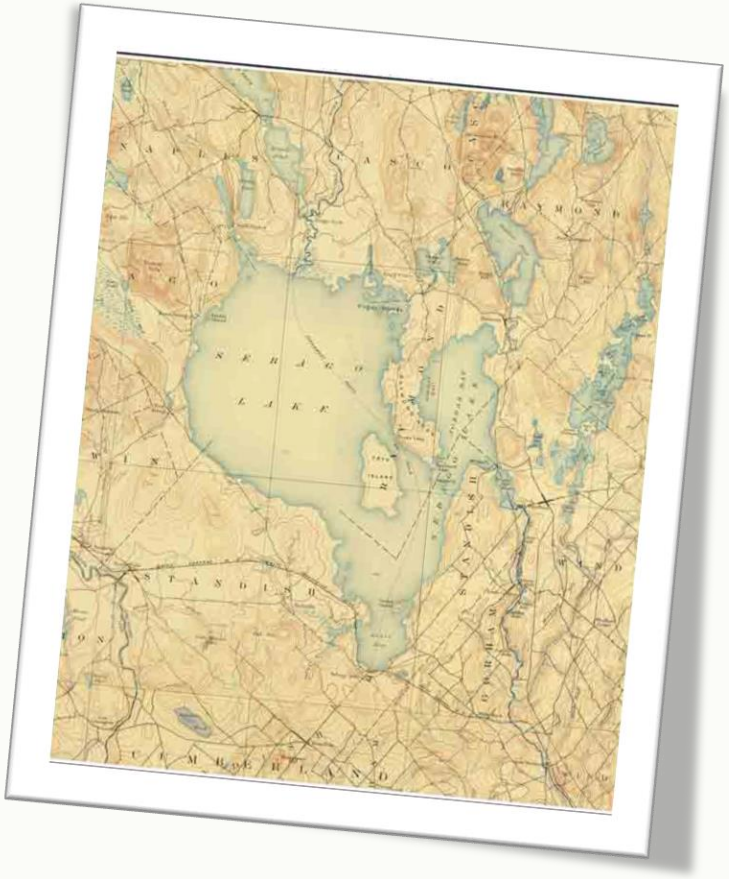
- This report provides a profile of visitors and their trips to the Maine Lakes & Mountains tourism region during 2018, from a survey of:
  - 325 overnight visitors, and
  - 175 day visitors.

- Throughout this report, data for the Maine Lakes & Mountains tourism region will be presented alongside data for the state of Maine as a whole. Statistically significant differences between the tourism region and the state were calculated at the 95% confidence level and are noted throughout by < > 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 Maine Lakes & Mountains region and the state of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.

Visitors to Maine Lakes & Mountains: How They Are Unique



Comparisons: Region vs. State

- Visitors to the Maine Lakes & Mountains 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:
  - ✓ Visitor origin and demographics,
  - ✓ Travel interest areas, and
  - ✓ The activities participated in while visiting.

- Visitor origin, trip activities, and interest areas reflect the natural environment in the Lakes & Mountains region as well as its location within the state.

- The highlights of these differences are shown on the following pages.

Visitor Origin and Demographics

Visitors to the Maine Lakes & Mountain region, compared to visitors statewide were…

Overnight Visitors

More likely to be traveling with children.

Day Visitors

More likely to be Maine residents.

Trip Interest Areas

Visitors to the Maine Lakes & Mountain region, compared to visitors statewide were…

Overnight and Day Visitors

Less likely to be visiting primarily for shopping or historical/cultural activities.

Overnight Visitors

More likely to be visiting primarily for outdoor recreation and **more likely** to be interested in outdoor recreation.

Trip Interests and Importance (Travel Driver Index)

Visitors to the Maine Lakes & Mountain region, compared to visitors statewide were…

Overnight Visitors

More likely to be driven by active outdoor activities (non-water).

Less likely to be driven by culinary activities.

Trip Activities

Visitors to the Maine Lakes & Mountain region, compared to visitors statewide, were…

Day and Overnight Visitors

More likely to enjoy mountain views.
More likely to attend a sporting event.
Less likely to enjoy coastal views.

Day Visitors

More likely to horseback ride.
Less likely to go to the beach.

Overnight Visitors

More likely to canoe or kayak.
Less likely to swim in a pool.

Trip Activities

Visitors to the Maine Lakes & Mountain region, compared to visitors statewide, were…

Overnight Visitors

Less likely to enjoy local seafood.

Day Visitors

More likely to enjoy food at local fairs or festivals.

Visitation and Economic Impact Summary

Visitation and Economic Impact Summary: Maine Lakes & Mountains

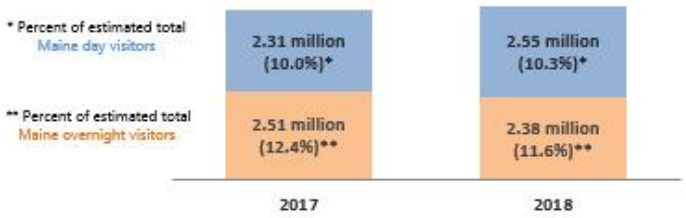
2018 Regional Tourism Impact Estimates

An estimated 4.93 million travelers visited the Maine Lakes & Mountains region in 2018 ~ a 2.4% increase over 2017.

2017 Total
4.82 million
(11.1% of All Maine Visitors)

2018 Total
4.93 million
(10.9% of All Maine Visitors)

Number of Visitors to the Maine Lakes & Mountains Region

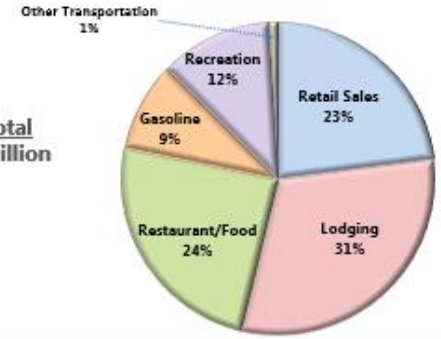


The visitation estimates shown above include all visitors on tourism-related trips. Tourism related trips include: all leisure trips, trips that are a general visit to see friends or relatives, a wedding, a holiday visit, and business trips that are for a convention/conference/trade show or training/professional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

2018 Regional Tourism Impact Estimates

In 2018, Maine Lakes & Mountains visitors spent $670.5 million ~ on par with 2017.

2018 Total
$670.5 million



The $670.5 million spent by visitors to the Maine Lakes & Mountains supported a 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, restauranteurs 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.

11,478 jobs

$224.6 million in total earnings

$61.75 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 RIMS II economic impact model.

OVERNIGHT VISITORS

Profile of Overnight Visitors

Overnight Visitor Demographics

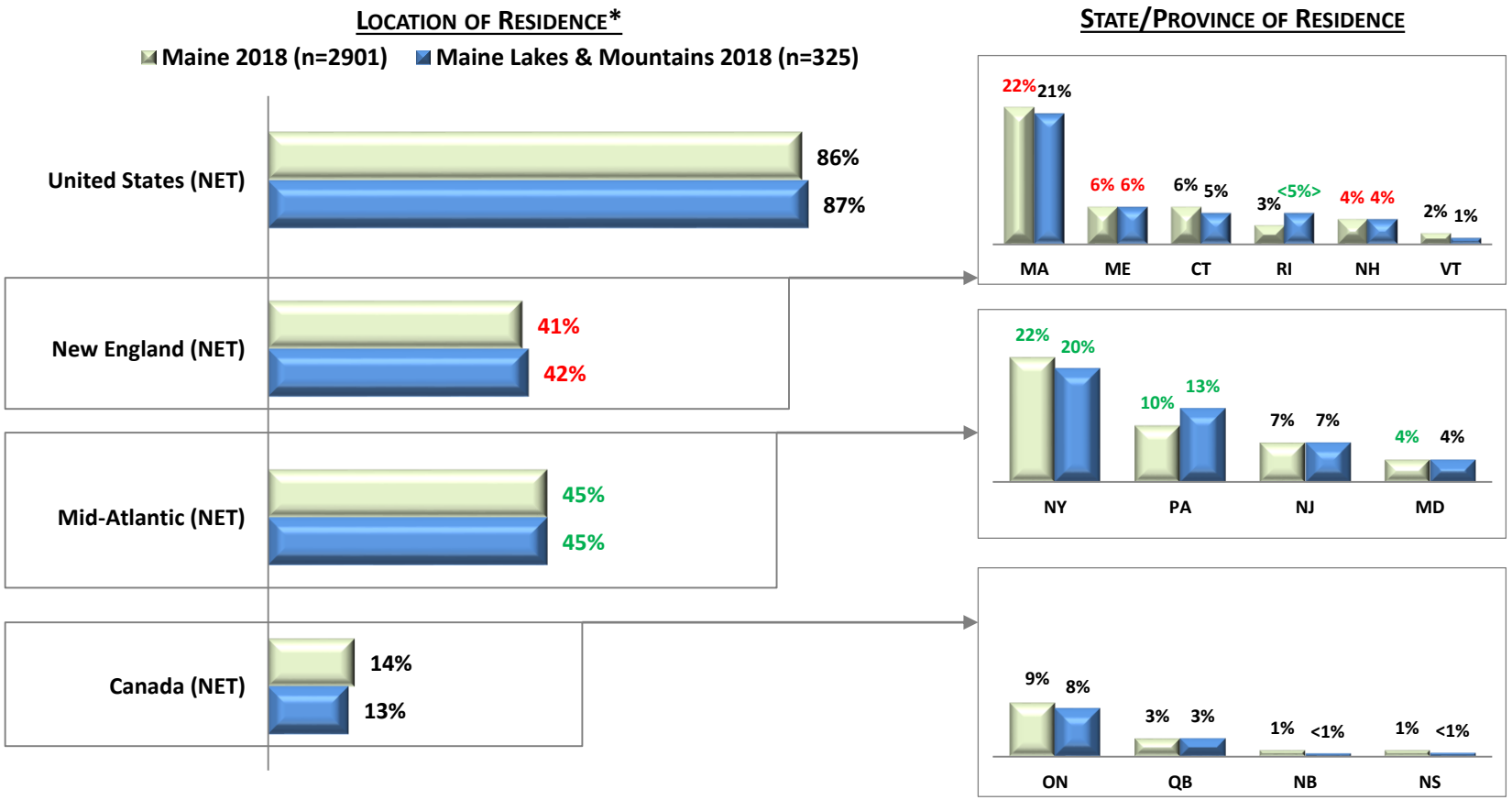
- The average age of surveyed overnight visitors to the Lakes & Mountains region in 2018 was 38. Their average income was $82,000.
- Six out of ten surveyed visitors were working full-time or had a college degree, and roughly half were married.

	Maine 2018 (n=2901)	Lakes & Mountains 2018 (n=325)
Age:		
< 35	46%	49%
35 - 44	23%	25%
45 - 54	14%	14%
55 +	<17%>	11%
Mean	39.0	37.7
Income:		
< $50,000	27%	30%
$50,000 - $99,999	43%	43%
$100,000 +	30%	27%
Mean	$86,400	$81,900
Female	66%	66%
College degree or higher	65%	63%
Married	47%	46%
Employed full-time	62%	60%

<> 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 overnight travelers to the region were U.S. residents, with equal proportions coming from Mid-Atlantic and New England states.

- In both the region and the state, compared to 2017, visitors were less likely to come from New England in 2018 and more likely to come from the Mid-Atlantic.



**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.

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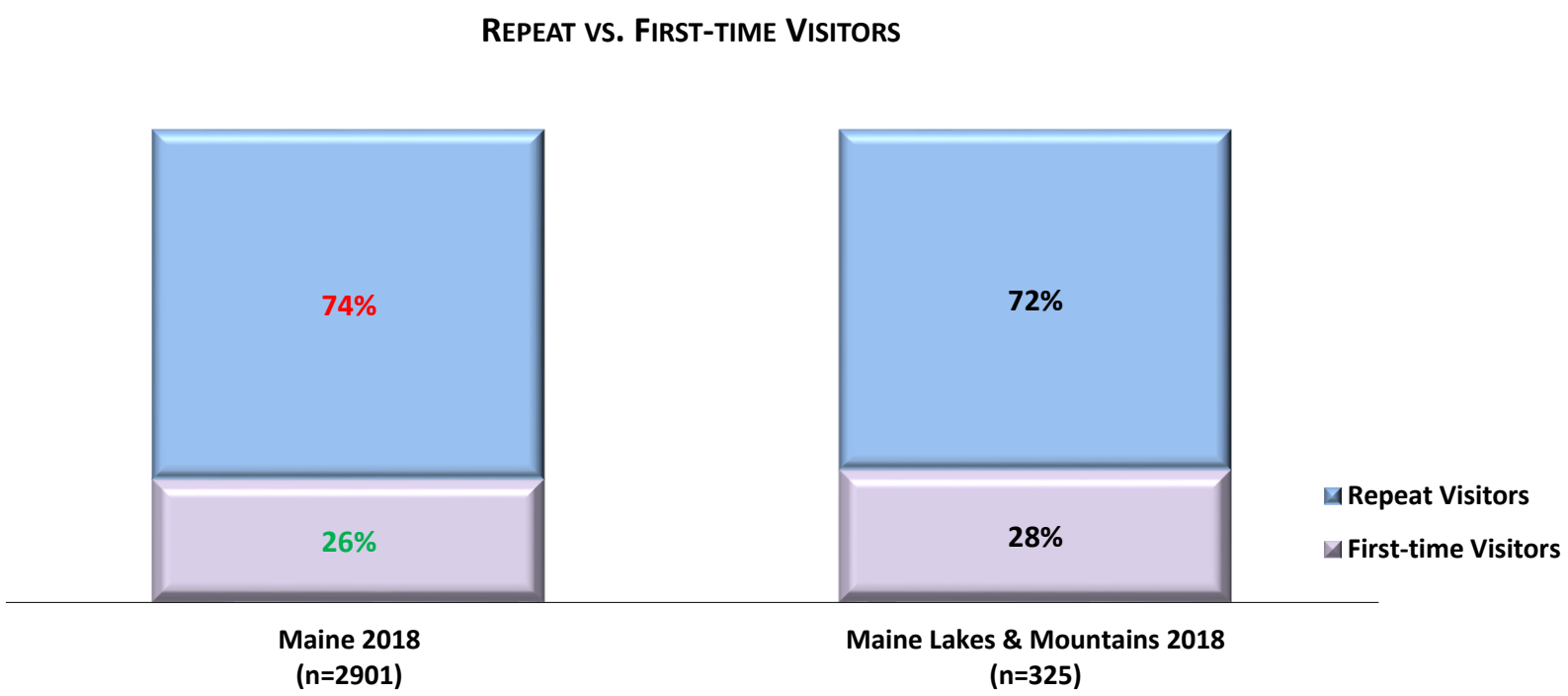
While most overnight visitors to the region had been to Maine before, more than one-quarter were traveling to Maine for the first time.

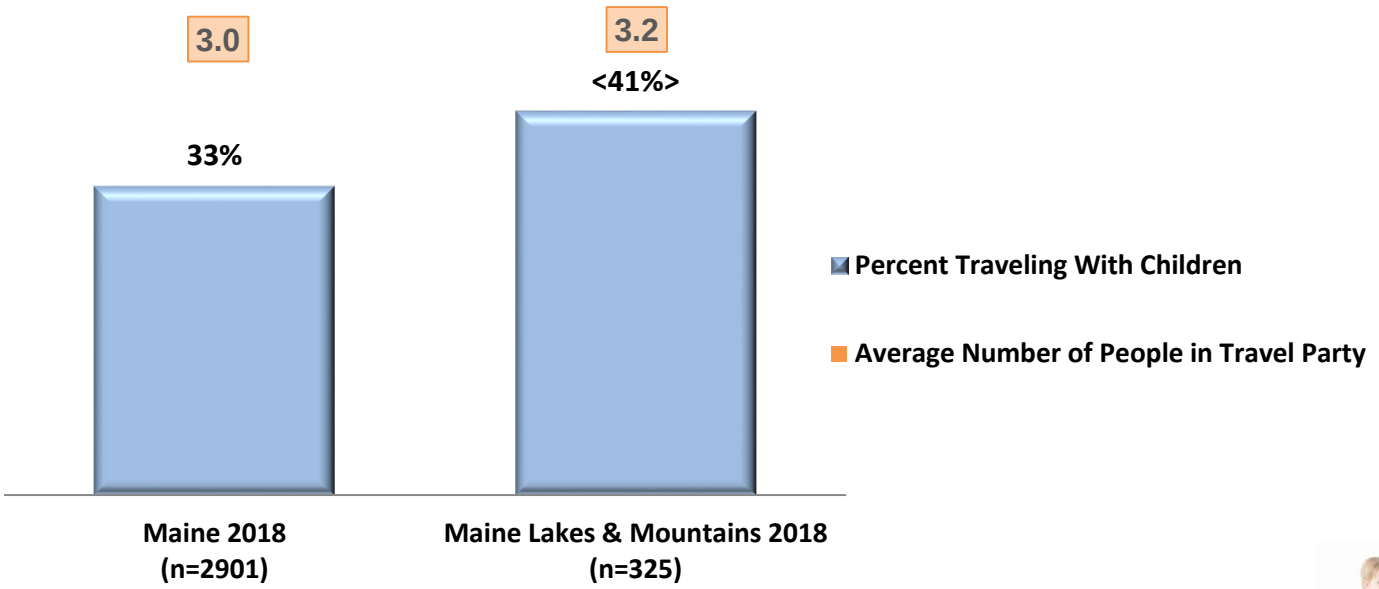


Q11. Was this your first visit in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Four out of ten overnight travelers to the region in 2018 had children in their party. The average party included three people.

- Lakes & Mountains visitors were more likely than visitors to the state overall to be traveling with children.

TRAVEL PARTY SIZE AND COMPOSITION

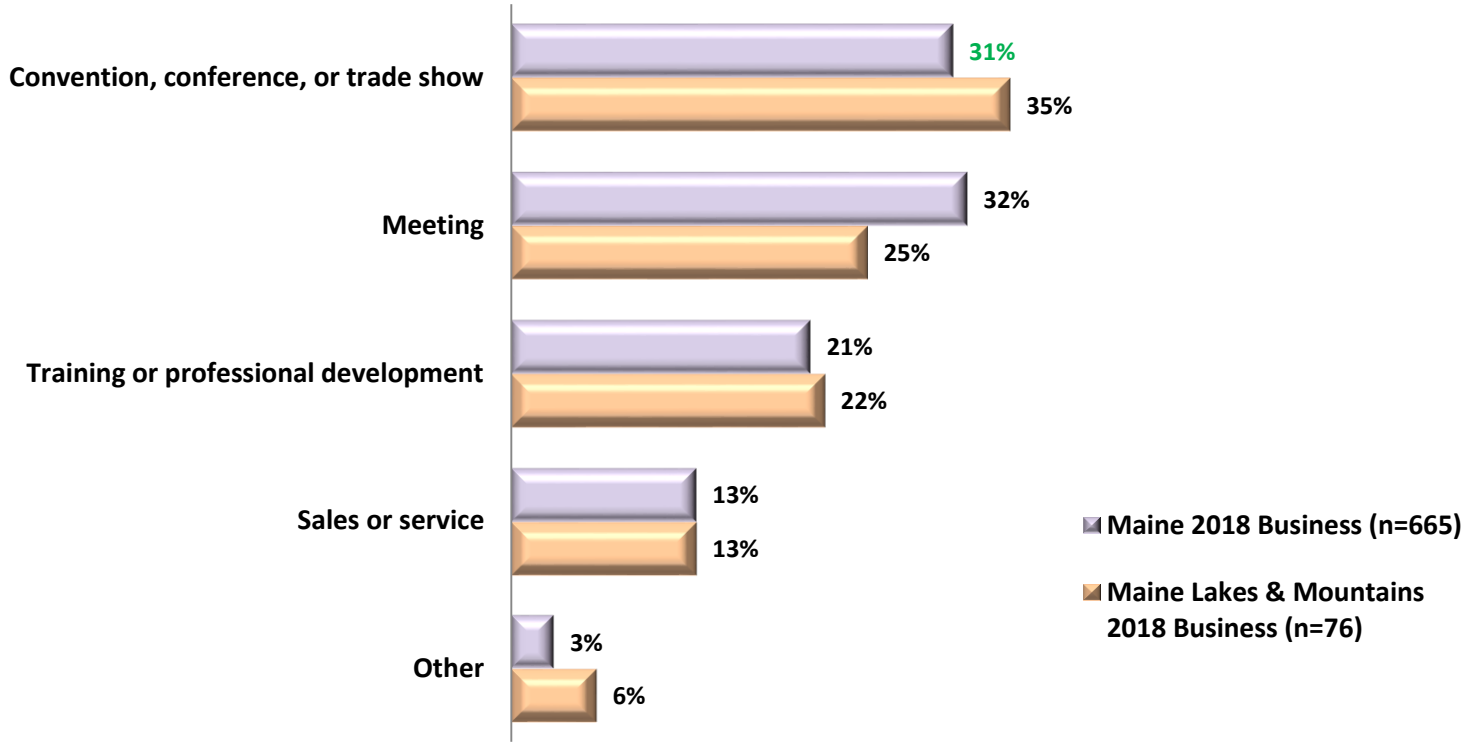


Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?
Q25. How many of these people were: Children?
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant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

Overnight Visitors: Trip Experience

In 2018, conventions, conferences, and trade shows were the main draw for overnight business travelers to the region, though many came for meetings or training.

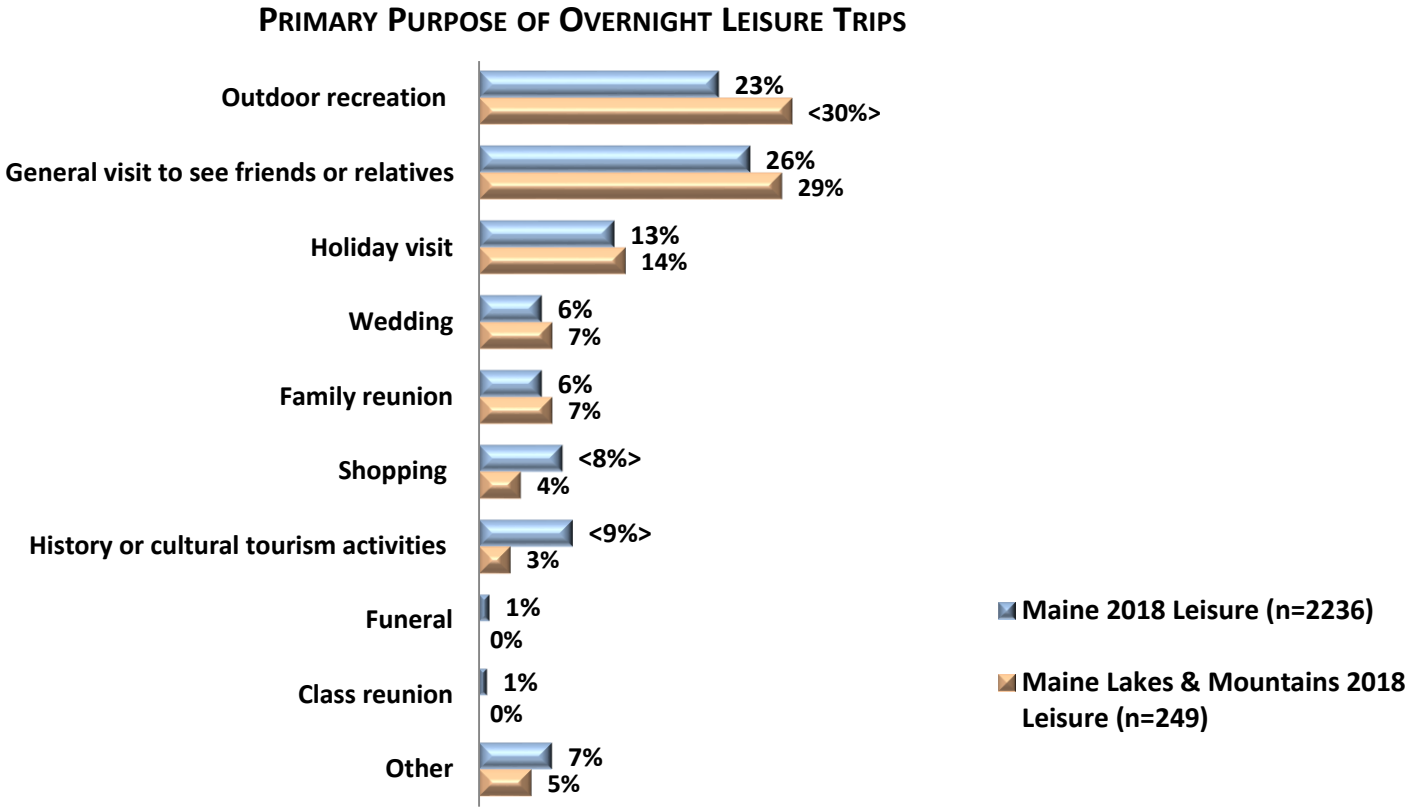
Primary Purpose of Overnight Business Trips



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.

Outdoor recreation and visits to see family or friends were the main reasons leisure travelers visited the Lakes & Mountains region overnight.

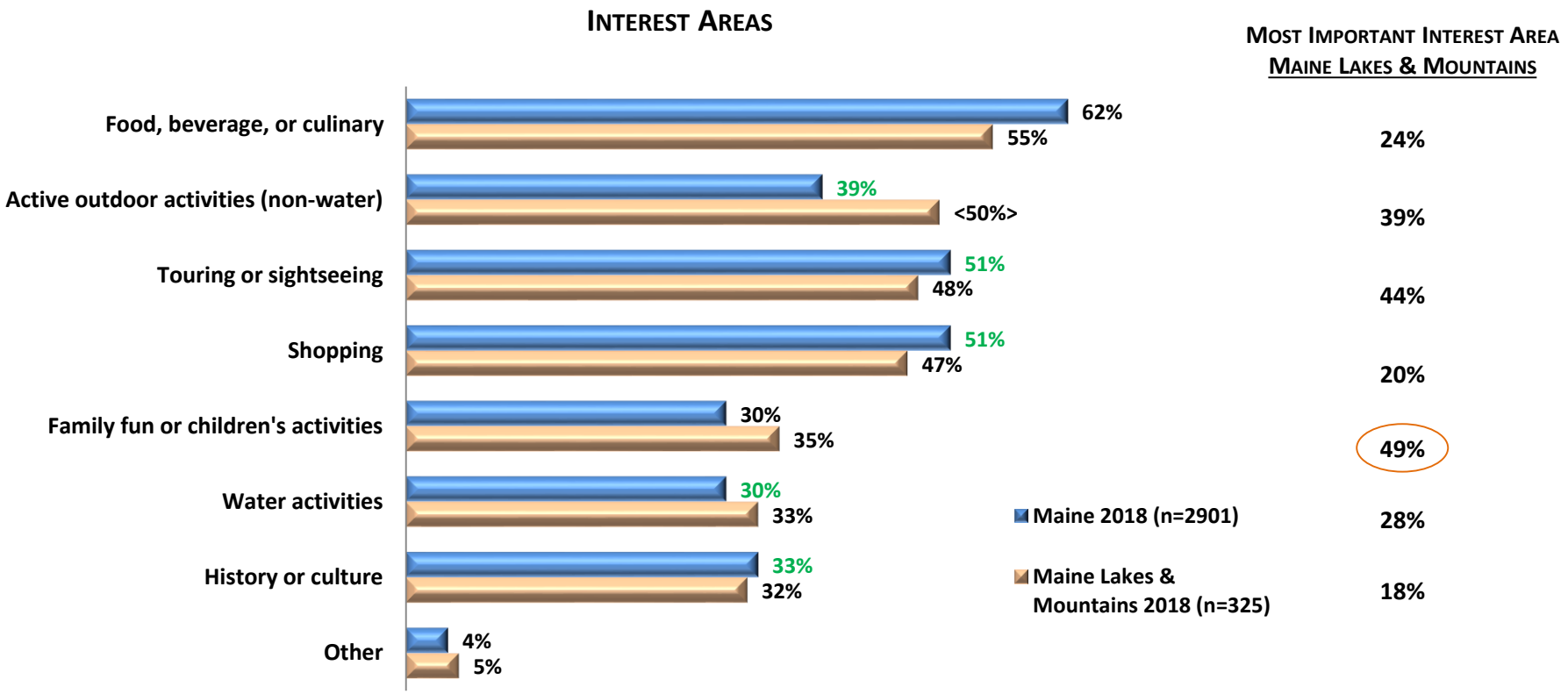
- Overnight travelers to the region were more likely than those to the state as a whole to indicate that outdoor recreation was the primary purpose of their trip.
- On the other hand, these travelers were less likely to indicate that shopping and cultural activities were the primary purposes of their trip.



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.

Roughly half of overnight visitors to the region were interested in food, active outdoor activities, sightseeing, or shopping. Family fun activities were particularly likely to be the *most important* interest area.

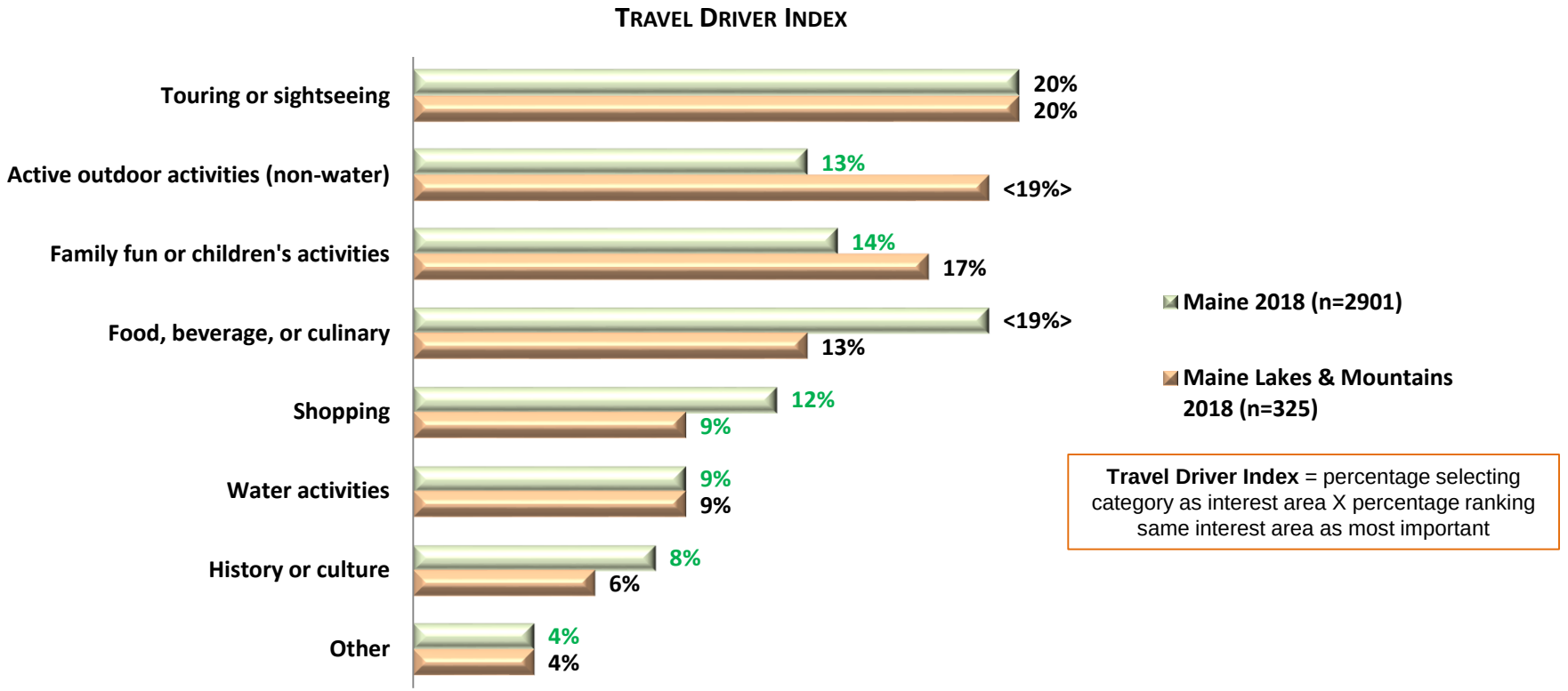
- Regional overnight visitors were more likely than visitors statewide to be interested in active outdoor activities.



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.
<> 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 looking at both interest and importance, sightseeing, outdoor activities, and family fun have the strongest role in driving overnight travel to the Lakes & Mountains region.

- Active outdoor activities were more likely to drive travel to the region than to the state overall. Culinary activities, on the other hand, were less of a driver for the region.



Q32. Which of the following ***interest areas*** did you want to pursue during this trip to Maine? *Please check all that apply*.
Q33. 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.
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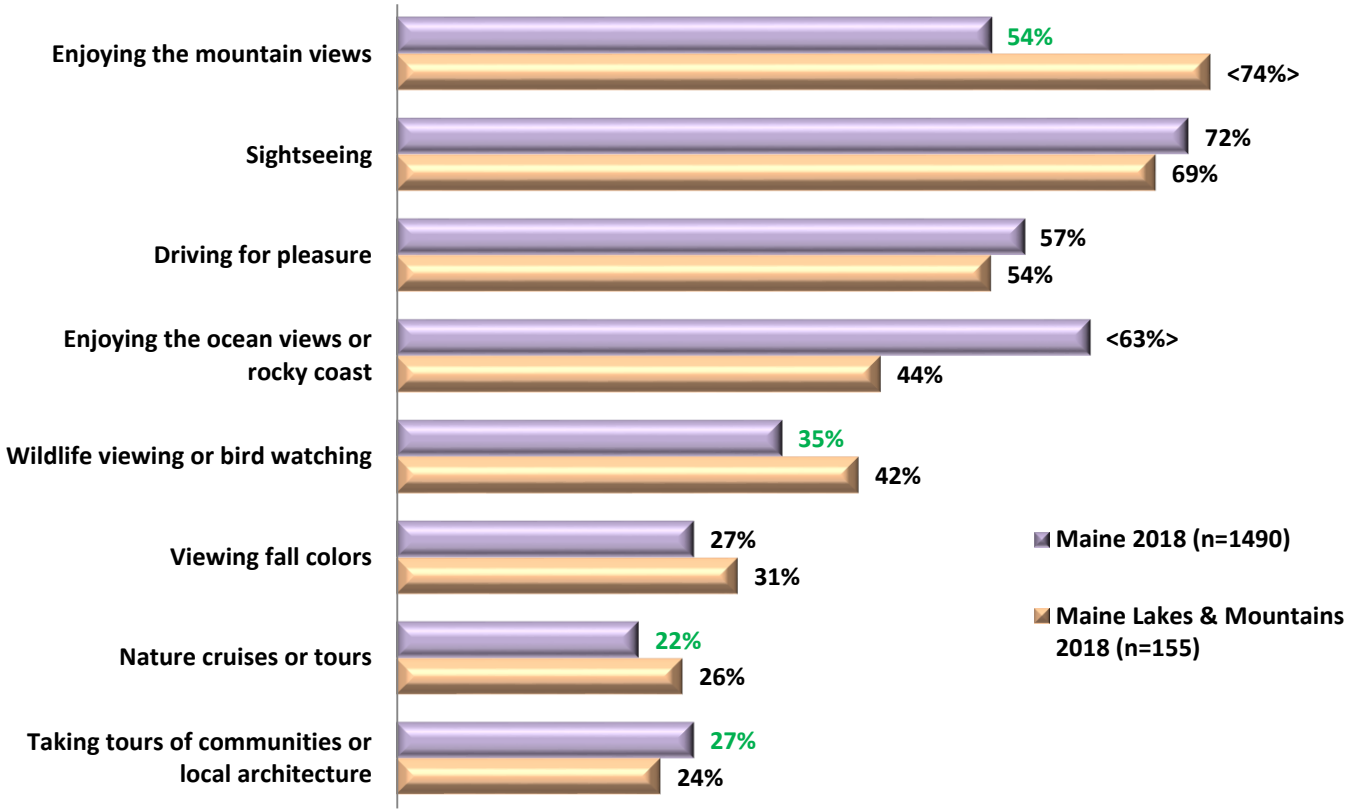
Enjoying the mountain views and sightseeing generally were the most common sightseeing activities in the region in 2018, followed by driving for pleasure, enjoying the coastal views, and viewing wildlife.

- Perhaps predictably, enjoying the mountain views was more common among visitors to the region than among visitors statewide, and enjoying the coastal views was less common.

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.
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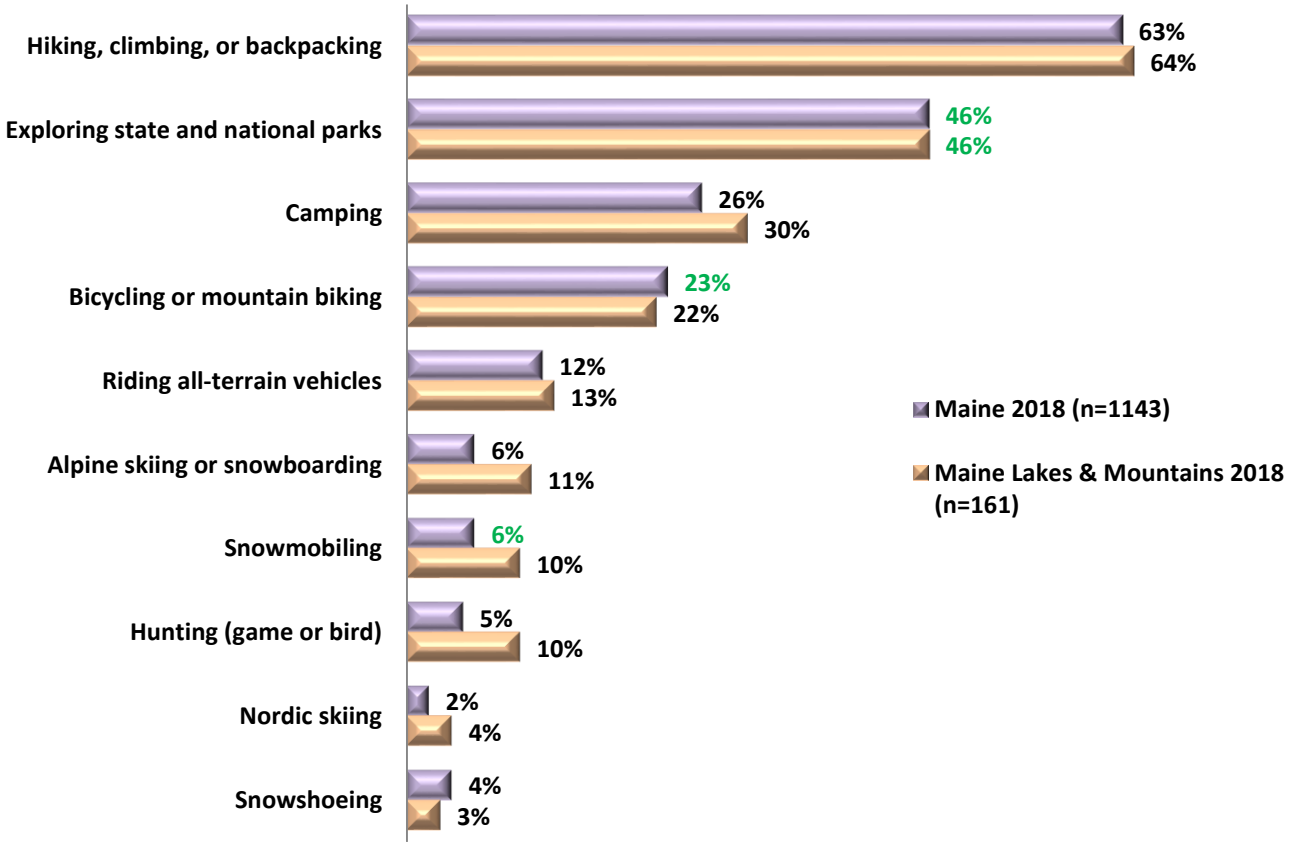
Hiking and related activities were the most common land-based outdoor activities among overnight visitors in the region, though exploring state or national parks was also relatively common.

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.
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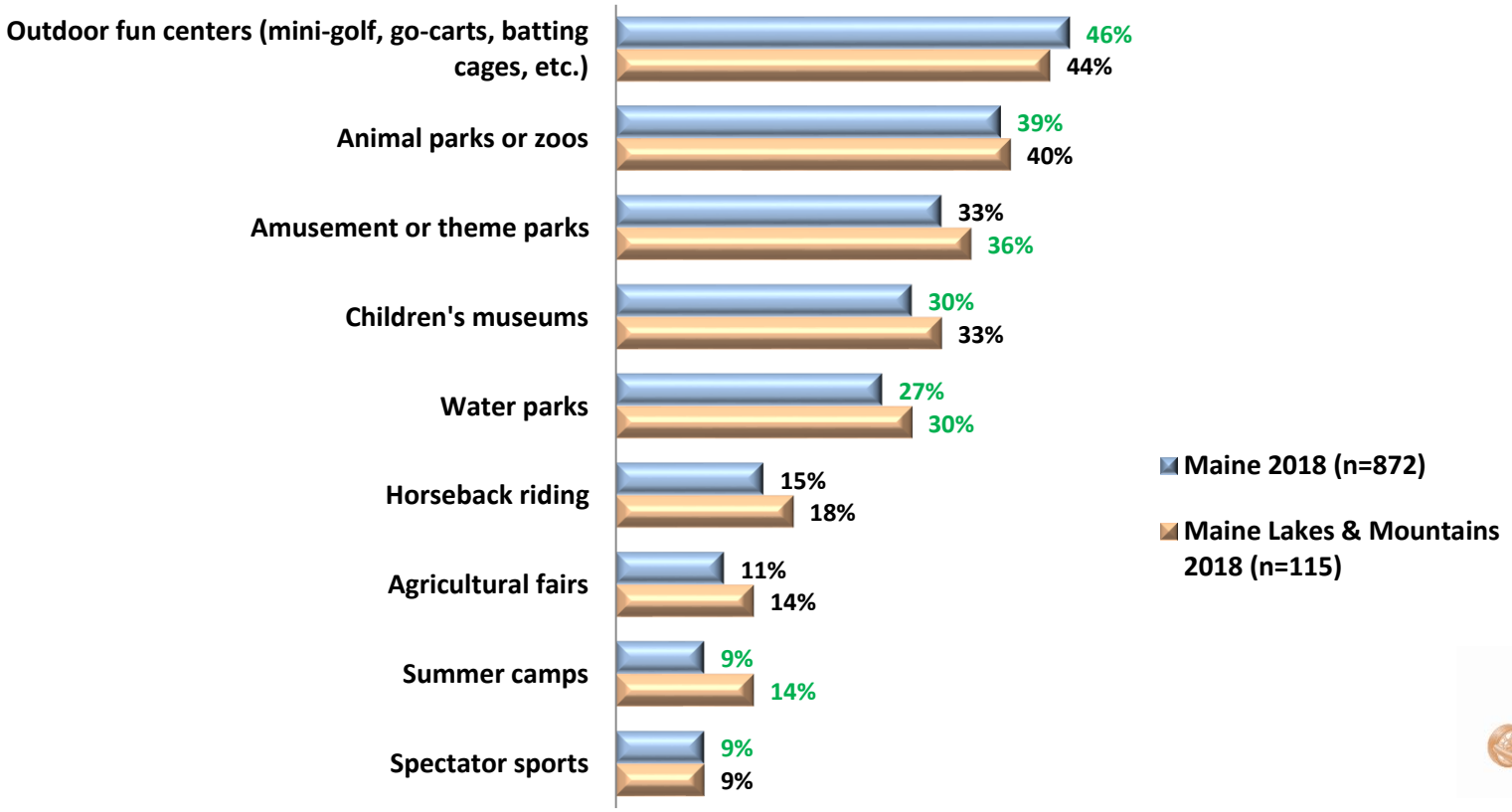
The most common family-friendly activities among overnight visitors in the region included visiting outdoor recreations centers, animal parks, amusement parks, children's museums, and water parks.

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.
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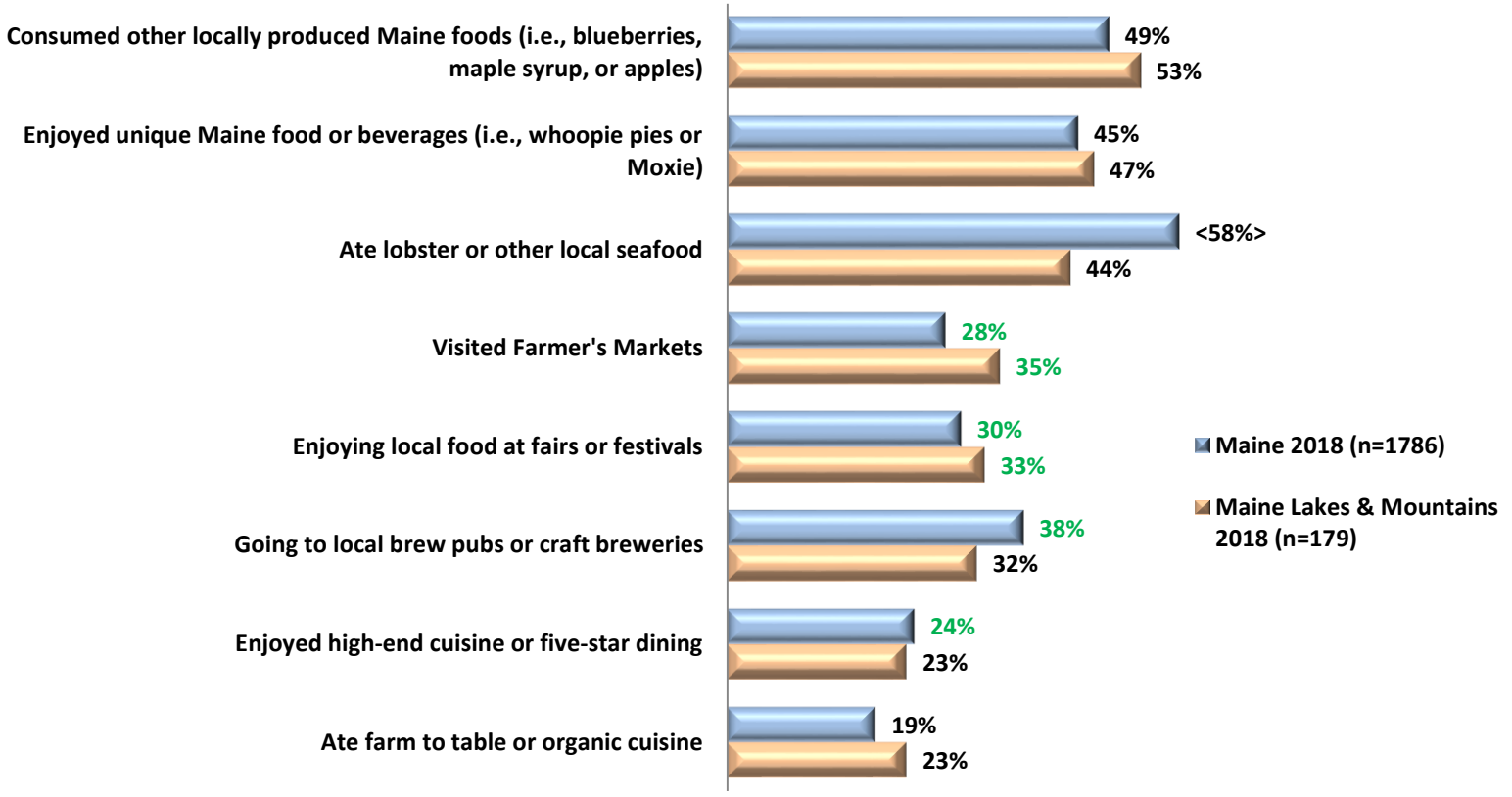
Eating local foods (including seafood and other fare) and foods that are unique to Maine were the most common culinary activities in the region, though a number of other culinary activities were relatively popular as well.

- Eating seafood was less common among overnight visitors to the region than among visitors statewide.
- Compared to 2017, travelers to the region were more likely to go to Farmer's Markets and local fairs (each was visited by 20% of overnight travelers in 2017).

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.
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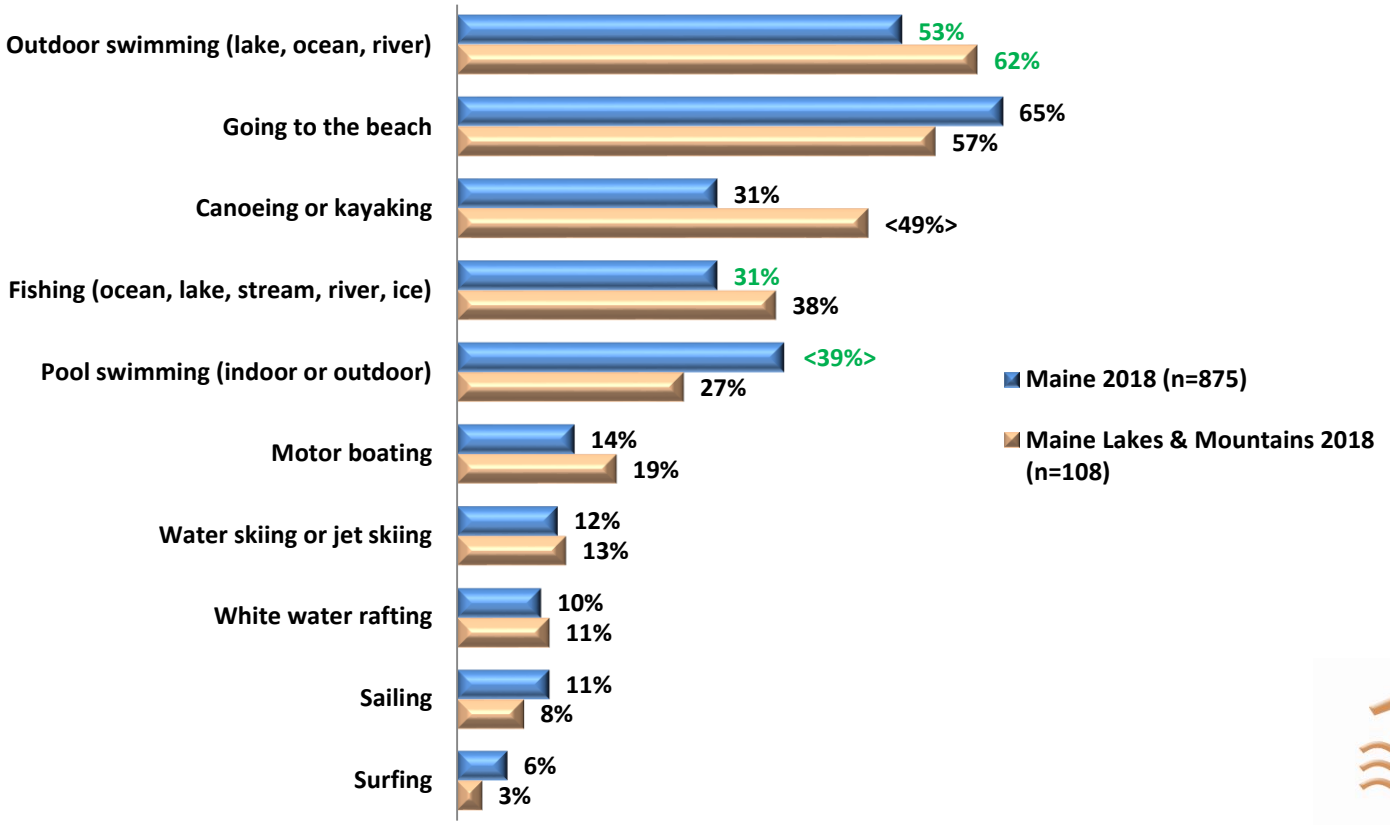
Outdoor swimming, going to the beach, and canoeing or kayaking were the most common water activities for overnight visitors to the region, though many went fishing or pool swimming as well.

- Visitors to the region were more likely than visitors statewide to go paddling in a canoe or kayak, but were less likely to go swimming in a pool.

WATER ACTIVITIES

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

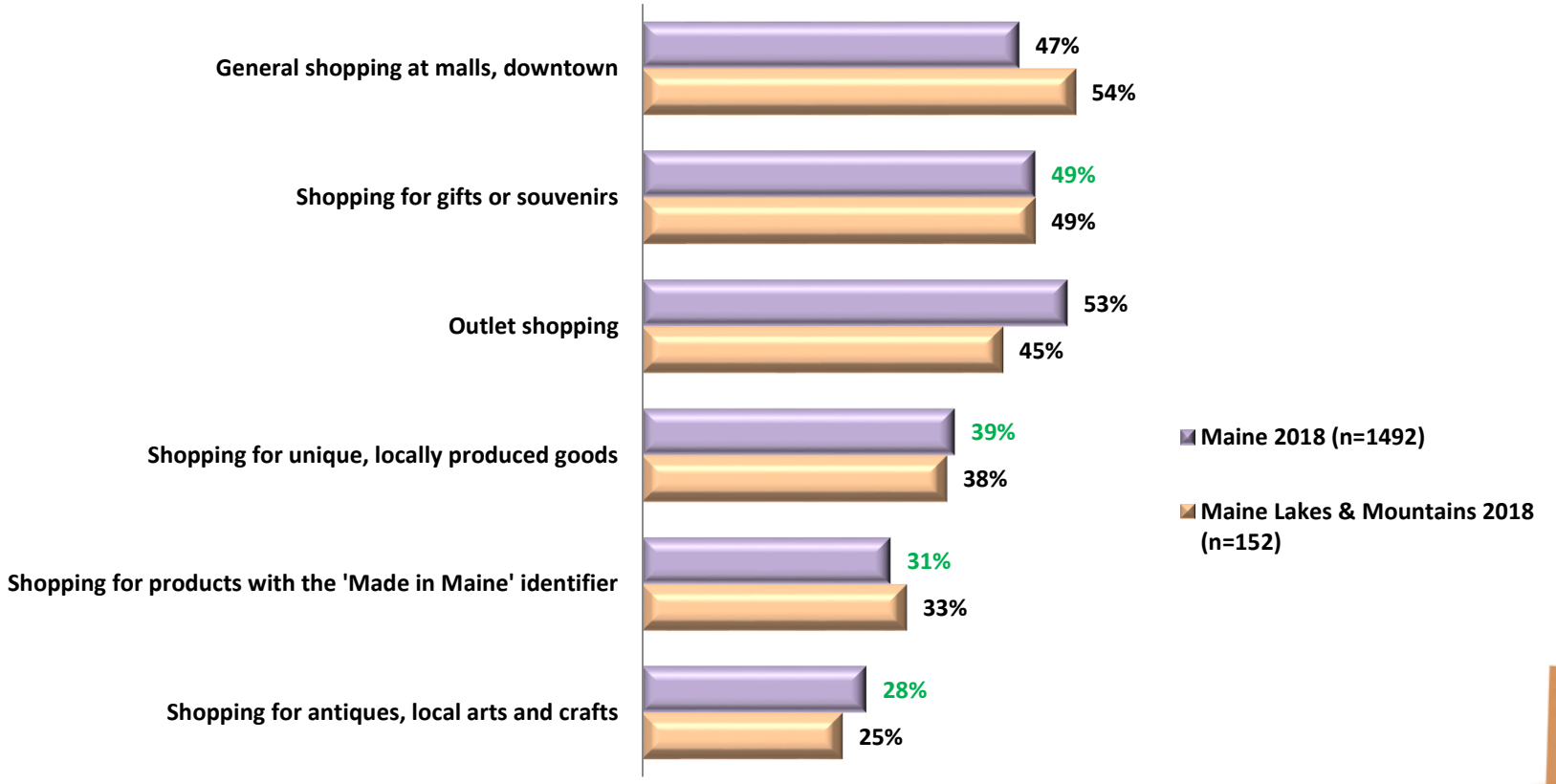


Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates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

Shopping in malls or downtown areas, shopping for gifts or souvenirs, and outlet shopping were the most common forms of shopping in the region, though many went shopping for other types of items as well.

SHOPPING ACTIVITIES

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



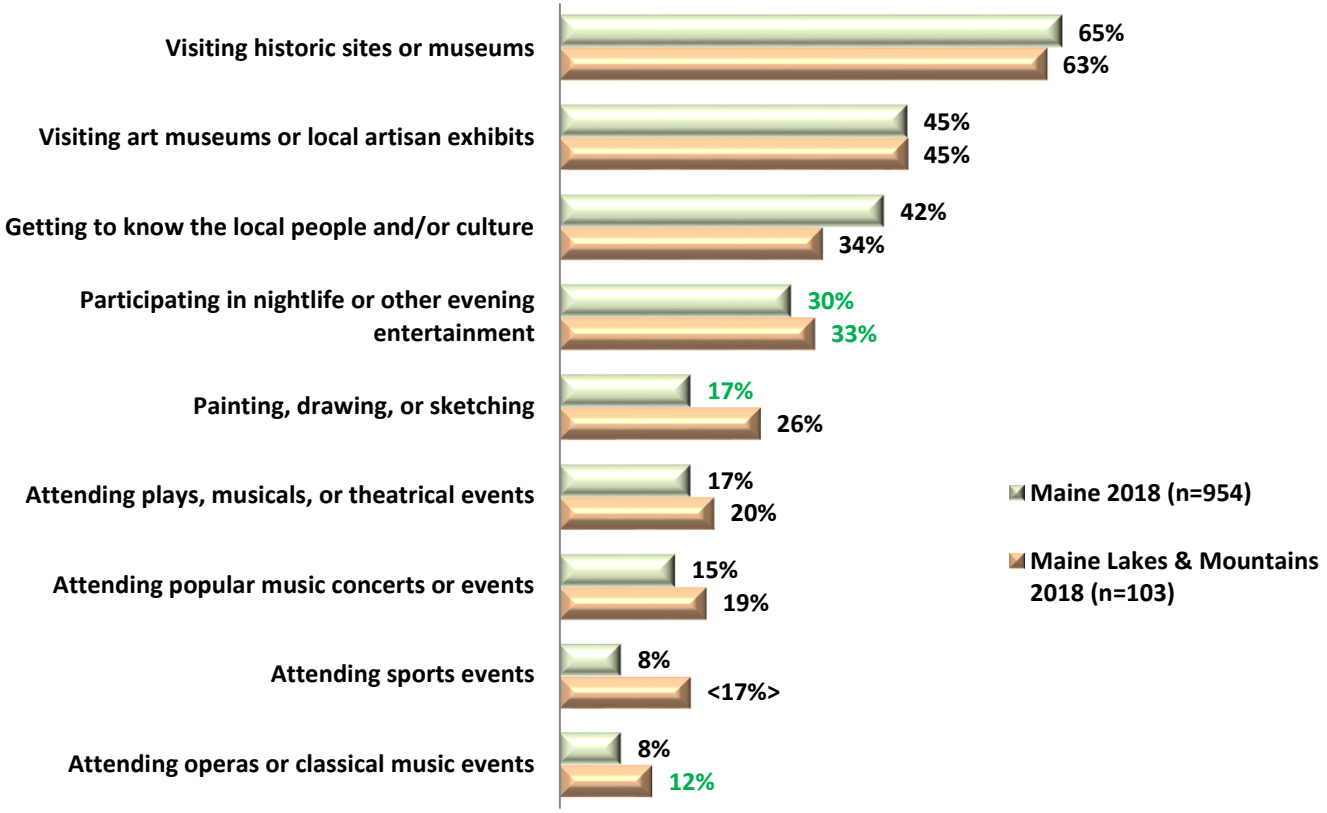
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates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

Visiting a historic site or museum was the most common cultural activity for overnight visitors to the region, followed by visiting art museums or exhibits. Several other cultural activities remain popular, however.

- Those coming to the Lakes & Mountains region were more likely than those visiting the state overall to attend a sports event while visiting.

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.

Long Lake and the Maine Wildlife Park were the most popular destinations within the region.

- Long Lake, the Maine Wildlife Park, the Maine Mineral and Gem Museum, and Pennacook Falls were more popular in 2018 than in 2017.

% VISITING

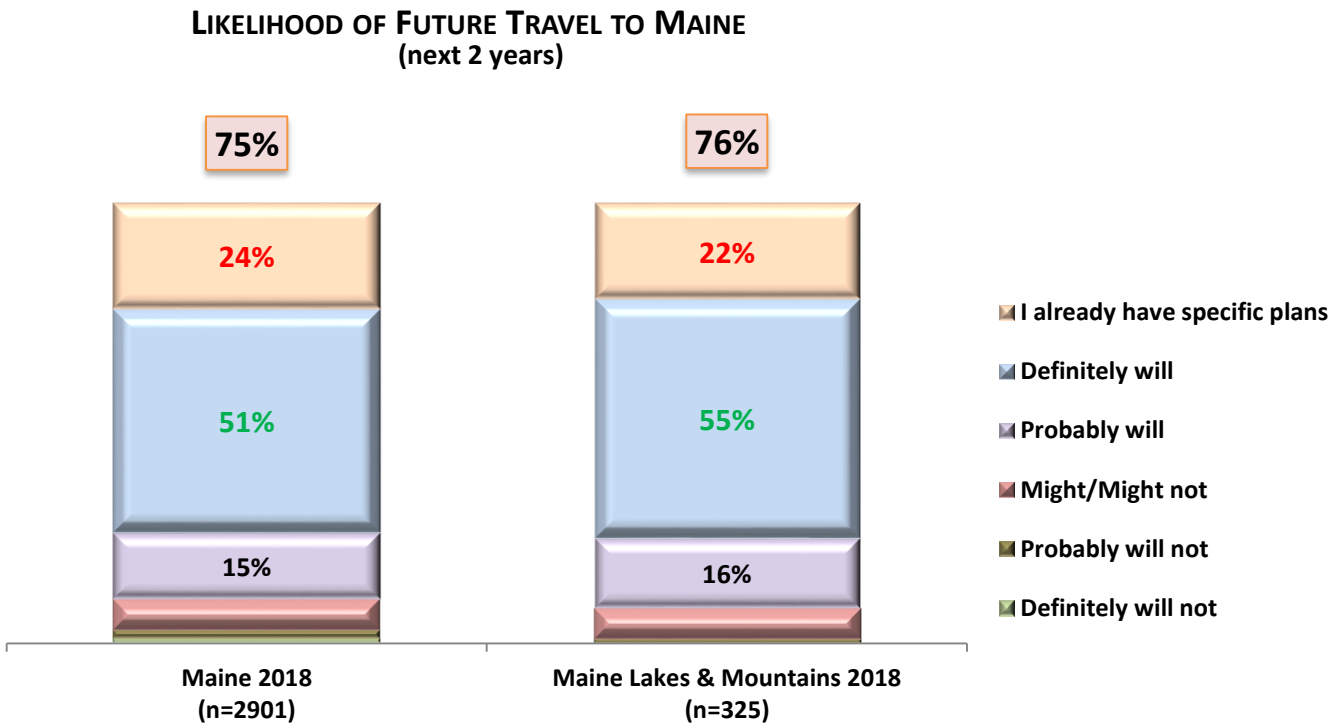
TOP DESTINATIONS		LESS POPULAR DESTINATIONS*	
22%	Long Lake	9%	Pennacook Falls
21%	Maine Wildlife Park	8%	Poland Spring Preservation Park
15%	Sebago Lake State Park	8%	Sugarloaf Mountain
14%	Black Mountain	8%	Saddleback Mountain
14%	Maine Beer Trail	7%	Maine Huts & Trails
13%	Rangeley Lakes	7%	Bates College Museum of Art
12%	White Mountain National Forest	7%	Shawnee Peak
12%	Oxford Casino	7%	Mount Blue State Park
10%	Artist's Covered Bridge	7%	Lovejoy Covered Bridge
10%	Grafton Notch State Park	7%	Rangeley Outdoor Sporting Heritage Museum
10%	Maine Mineral and Gem Museum	6%	Sunday River Ski Resort
		6%	McLaughlin Gardens

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

(n=325)

Q32: Within the region you visited, what specific attractions or locations 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 those visiting the region overnight had specific plans or definitely planned on visiting Maine again in 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

Profile of Day Visitors

Day Visitor Demographics

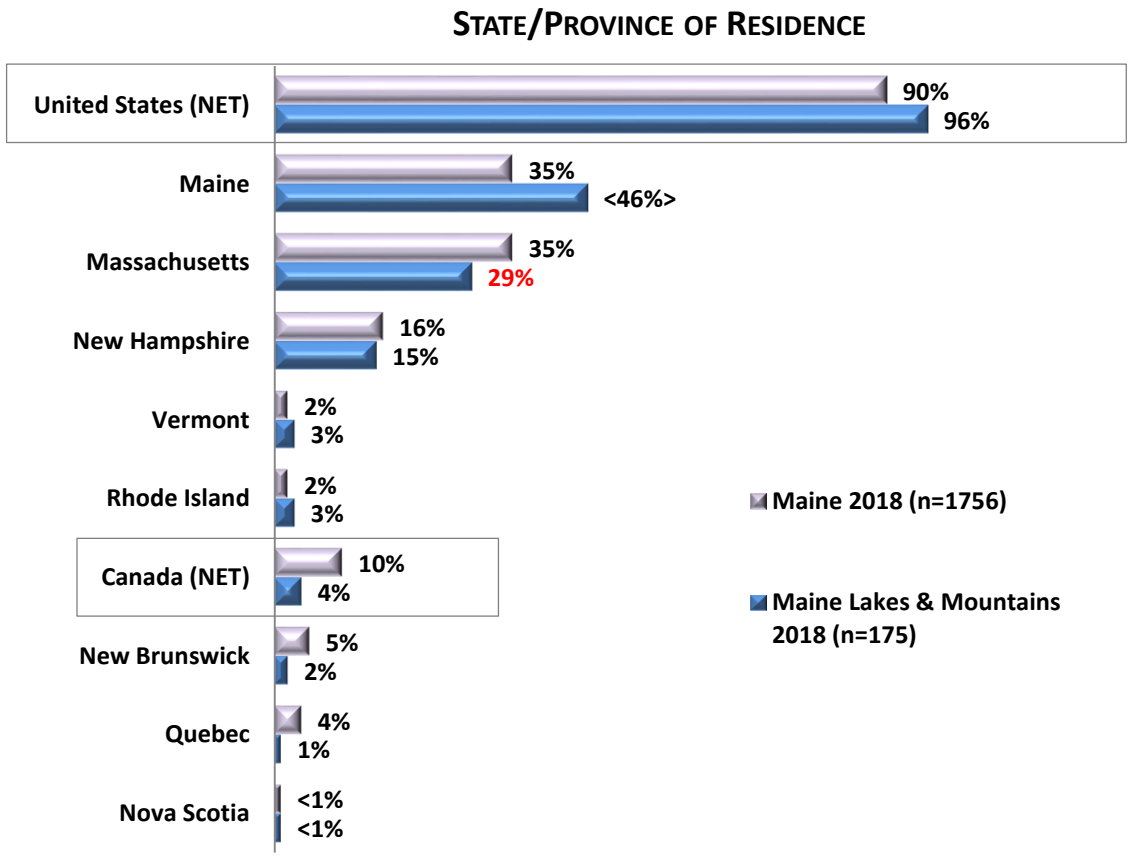
- Surveyed day visitors to the Maine Lakes & Mountains region were 41 years old and had an income of about $70,000, on average. About half were employed full-time.
- Most surveyed day visitors had a college degree, and almost half were married.

	Maine 2018 (n=1756)	Maine Lakes & Mountains 2018 (n=175)
Age:		
< 35	37%	41%
35 - 44	18%	16%
45 - 54	16%	15%
55 +	28%	27%
Mean	43.0	41.2
Income:		
< $50,000	38%	44%
$50,000 - $99,999	39%	37%
$100,000 +	22%	19%
Mean	$74,100	$69,300
Female	78%	81%
College degree or higher	58%	56%
Married	49%	47%
Employed full-time	49%	46%

<> 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 daytrippers to the Lakes & Mountains region in 2018 were Americans, including almost half who were residents of Maine.

- Day visitors to the region were more likely than visitors statewide to be from Maine.
- Fewer visitors came to the region from Massachusetts in 2018 (29%) than in 2017 (44%).



Q2. In what State or Province do you reside?
<> indicates a significant difference between this region and the State at the 95% confidence level.
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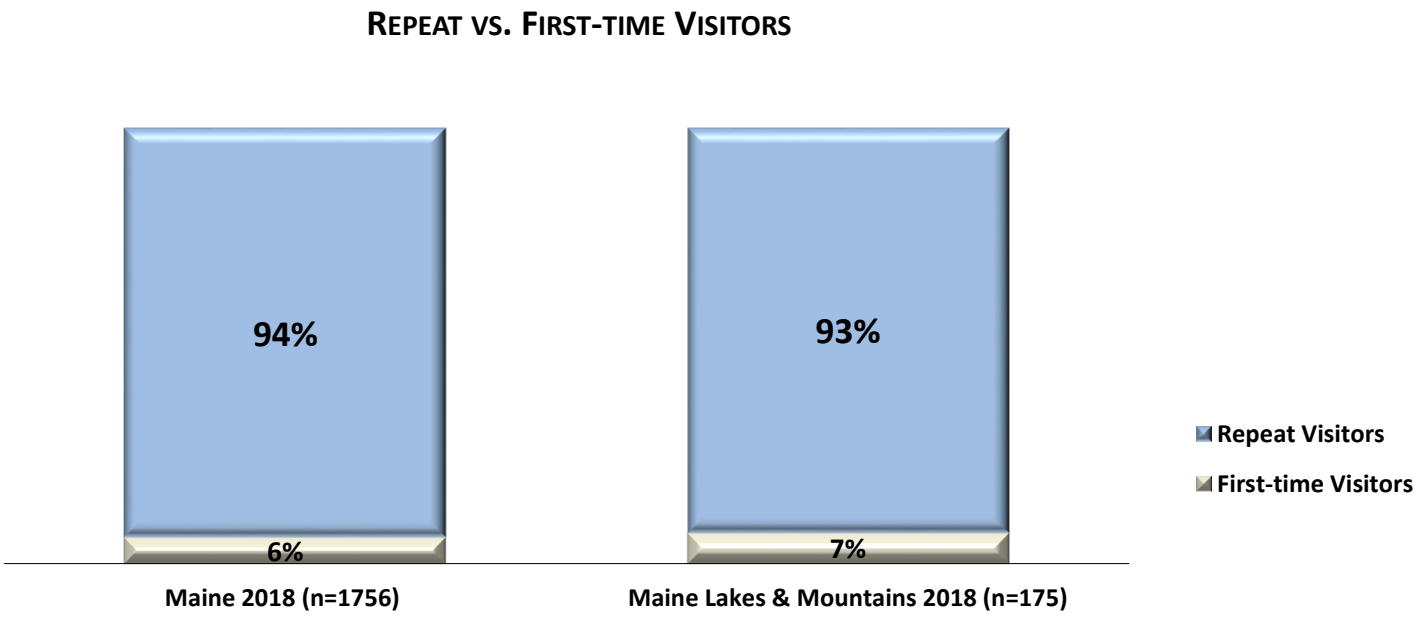
Almost all of the travelers visiting the Lakes & Mountains region for the day had been to Maine before; very few were first-time visitors.



Q10. Was this your first trip to Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.
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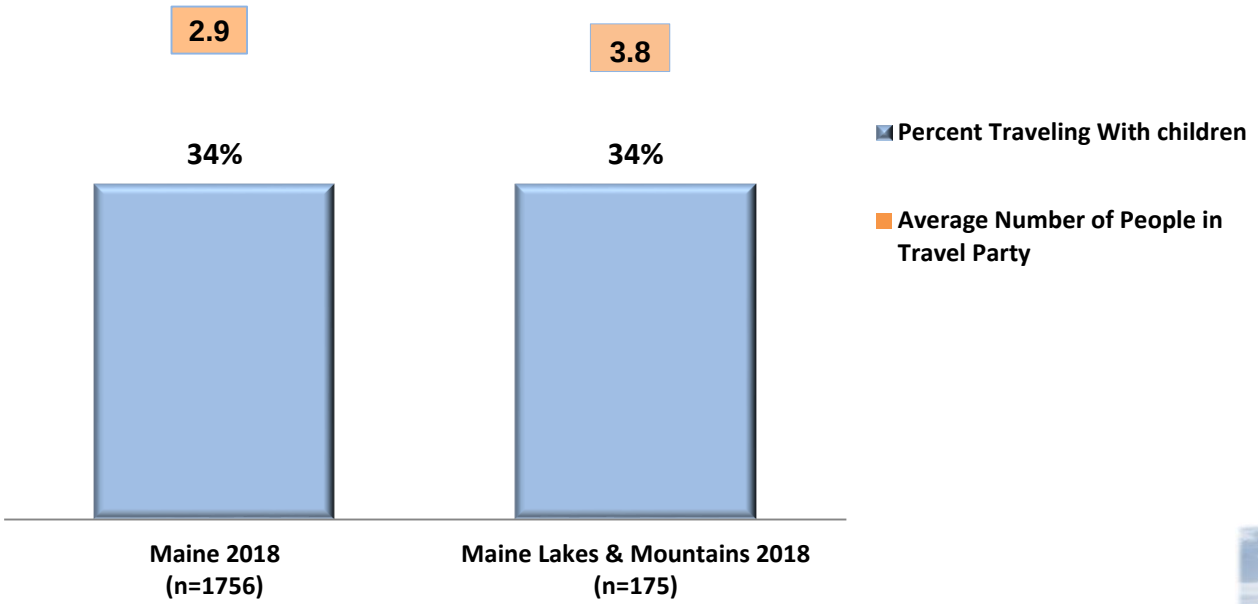
One-third of the day visitors to the region in 2018 were traveling with children. The average size of travel parties overall was about 4 people.

TRAVEL PARTY SIZE AND COMPOSITION



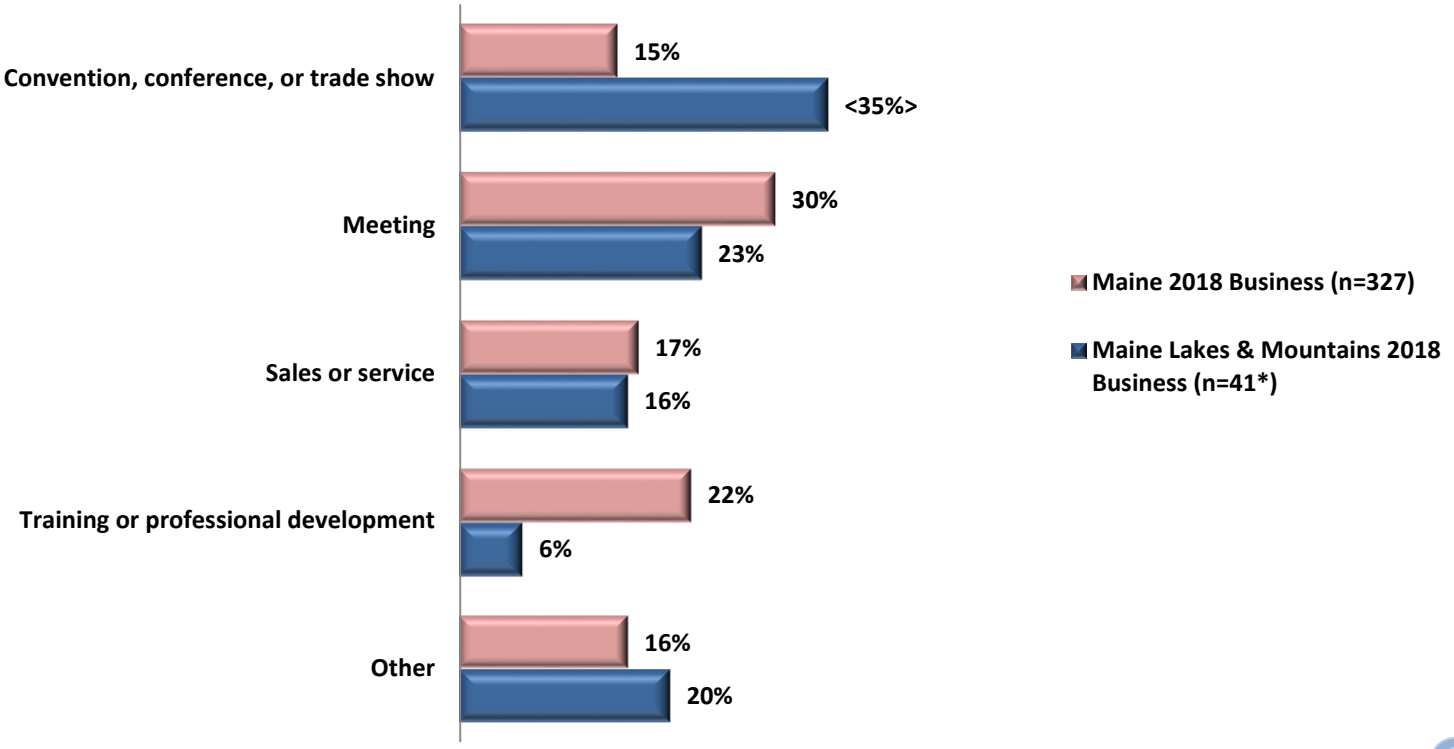
Q15. Including yourself and any children, how many people were in your immediate travel party on this trip?
Q16. How many of these people were: Children
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors:
Trip Experience

A variety of business needs draw day travelers to the region.

- Day business visitors to the region were more likely than similar visitors statewide to come for conventions or related events.

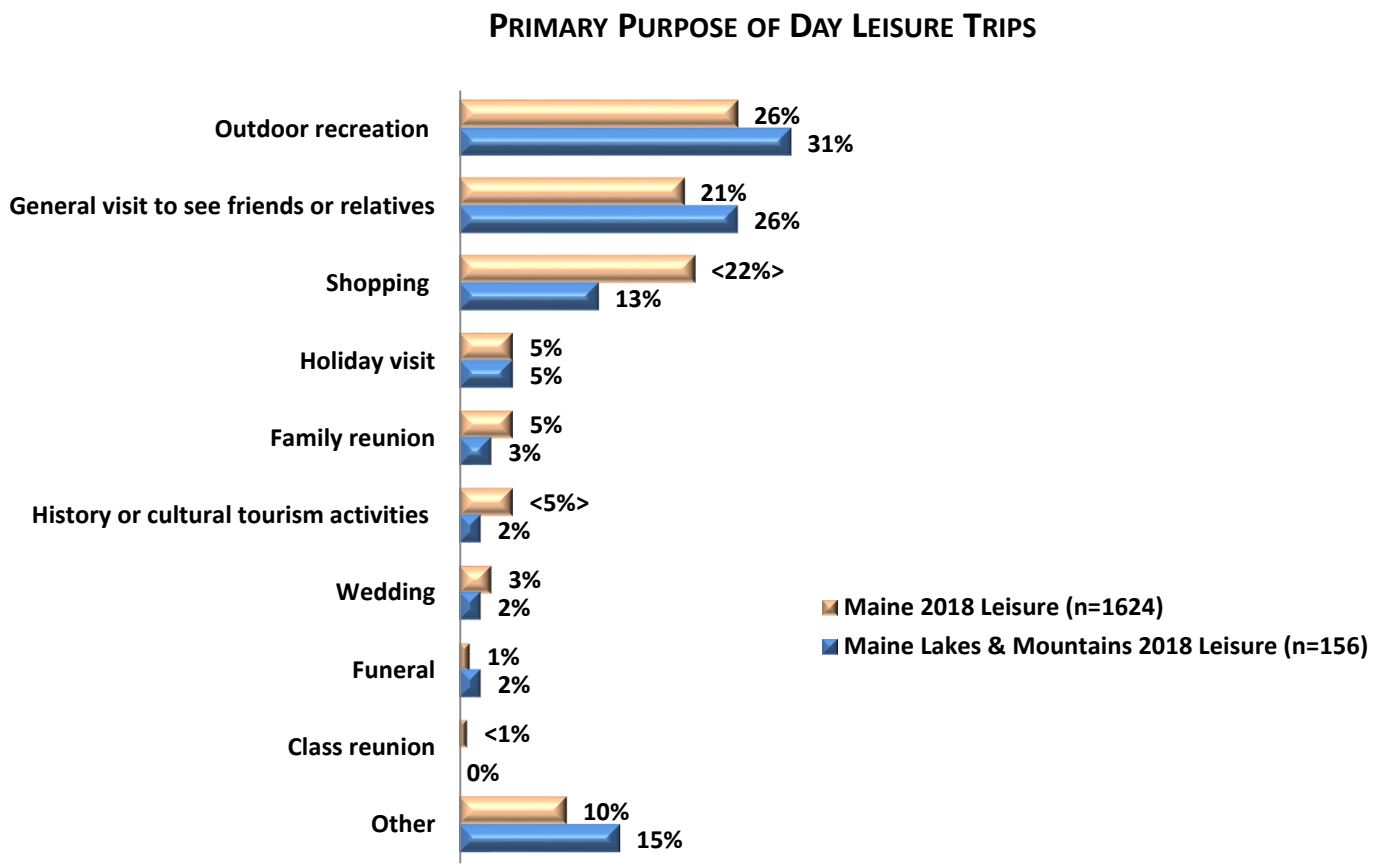
PRIMARY PURPOSE OF DAY BUSINESS TRIPS



Q8. What was the primary purpose of your most recent business trip in Maine?
<> indicates a significant difference between 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.

Outdoor recreation and visits to see family or friends are the most common reasons day visitors came to the region for leisure.

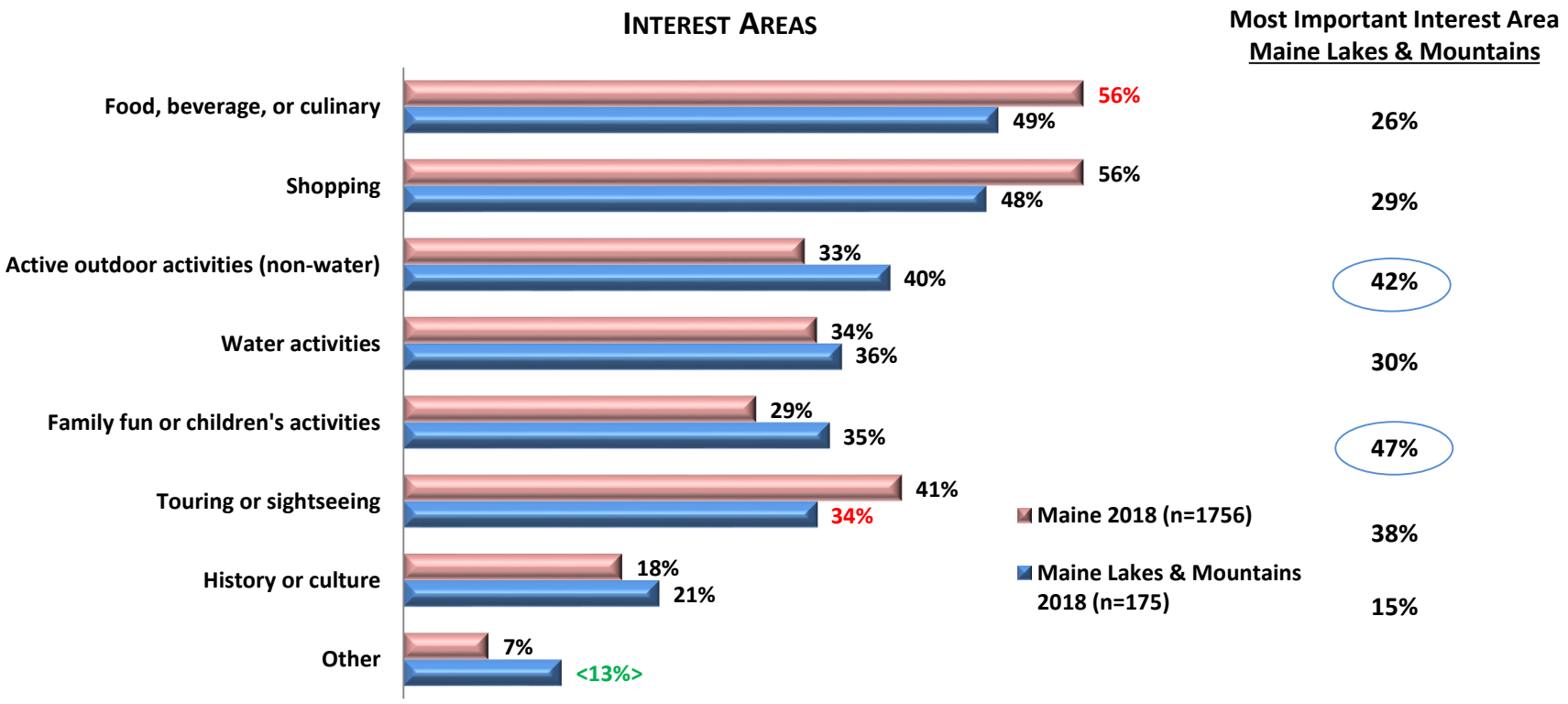
- Compared to day visitors across the state, visitors to the region were less likely to be motivated by shopping.



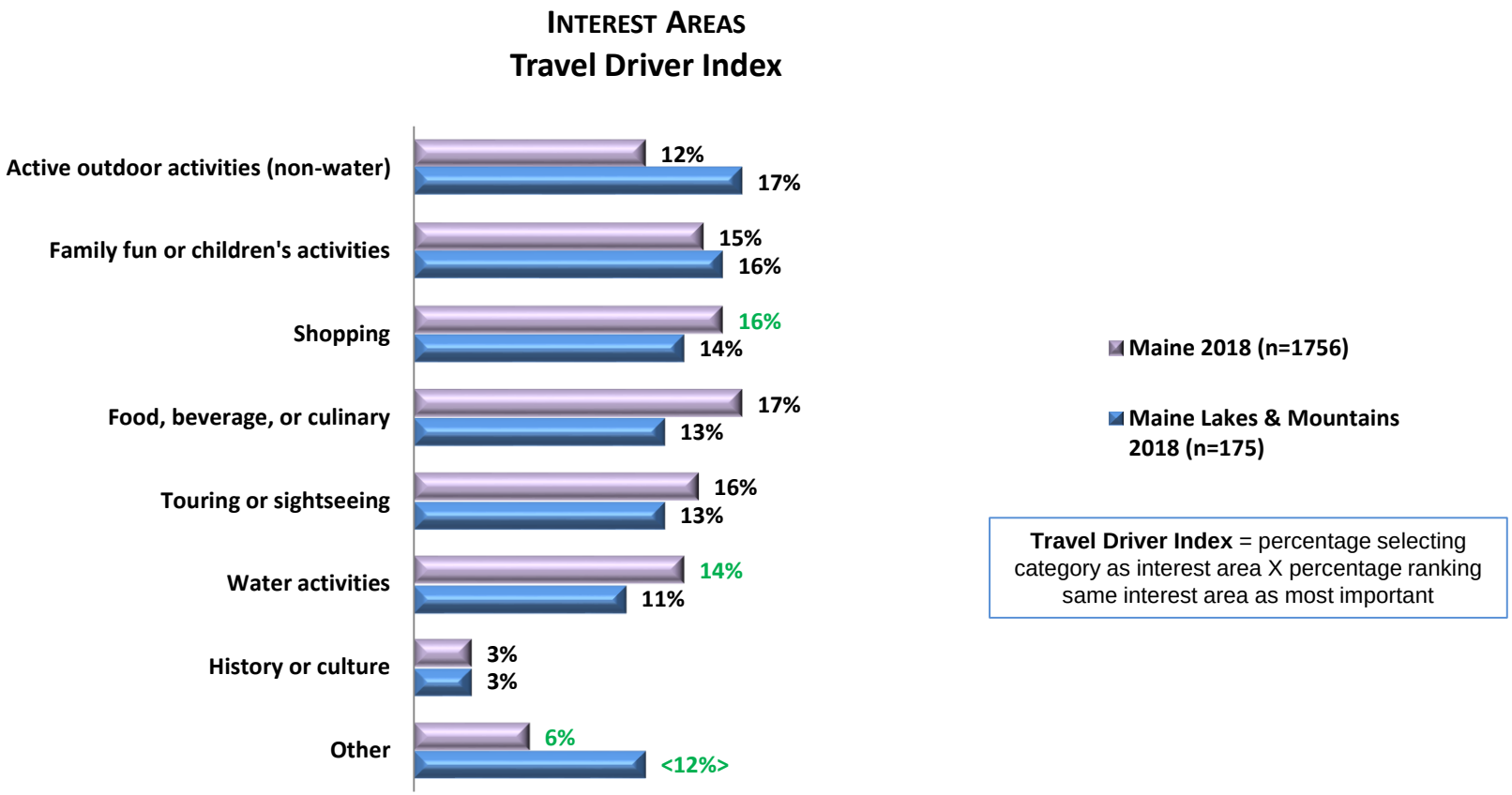
Q9. What was the primary purpose of your most recent day leisure trip in Maine?
<> indicates a significant difference between this region and the State at the 95% confidence level.

Day visitors to the region had many interests, most often food and shopping. Family fun and active outdoor activities were most likely to be considered the *most important* interests.

- Interest in general sightseeing in the region decreased from 2017 (when 54% indicated it was an interest area for their trip to Maine).



When indexed to combine interest and importance, a variety of activities were equally strong in driving visitors to the Lakes & Mountains region.

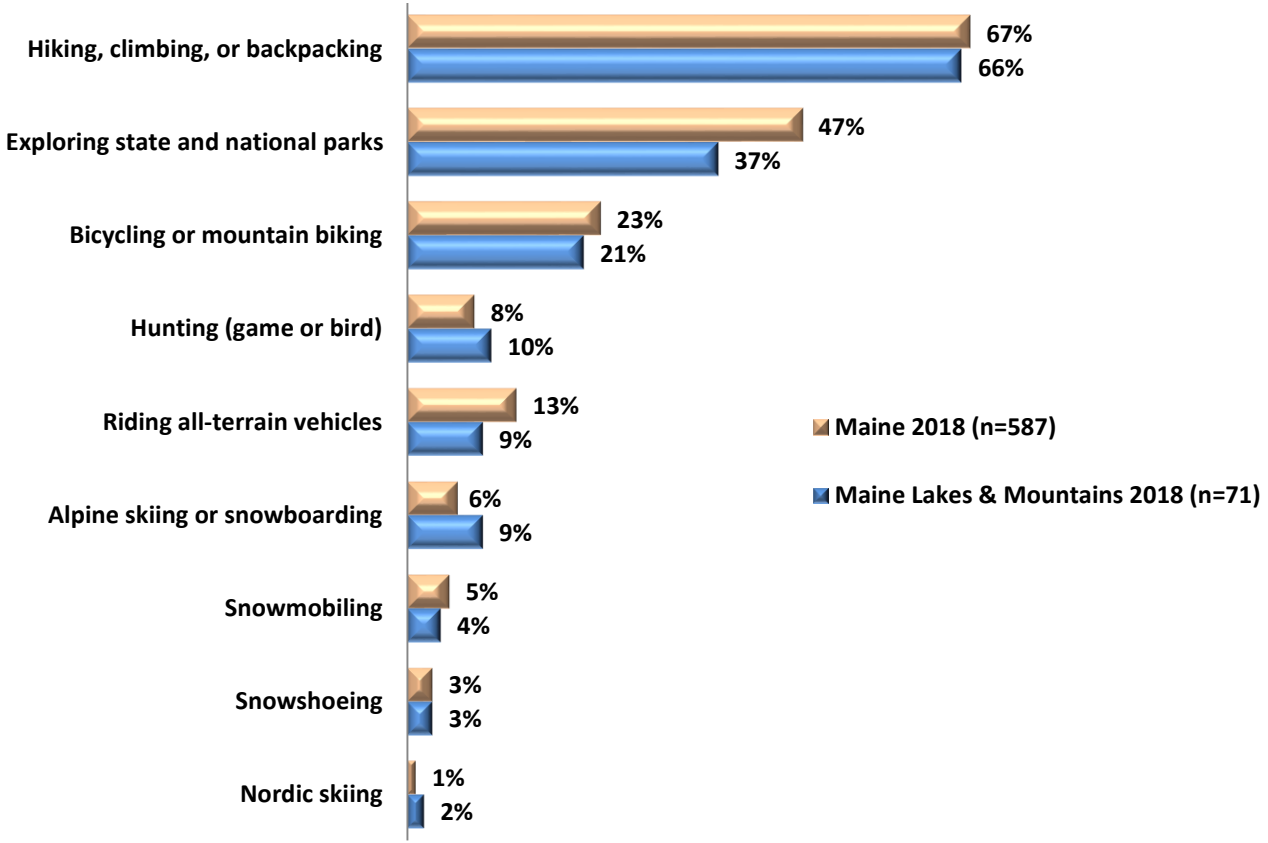


Q18. Which of the following ***interest areas*** did you want to pursue during this trip to Maine? *Please check all that apply*.
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.
<> indicates a 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.

Hiking, climbing, and backpacking were the most common active outdoor activities in the region, followed – distantly – by exploring state or national parks and biking.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

(Base: Those who report outdoor non-water activities as an interest area for their Maine trip)



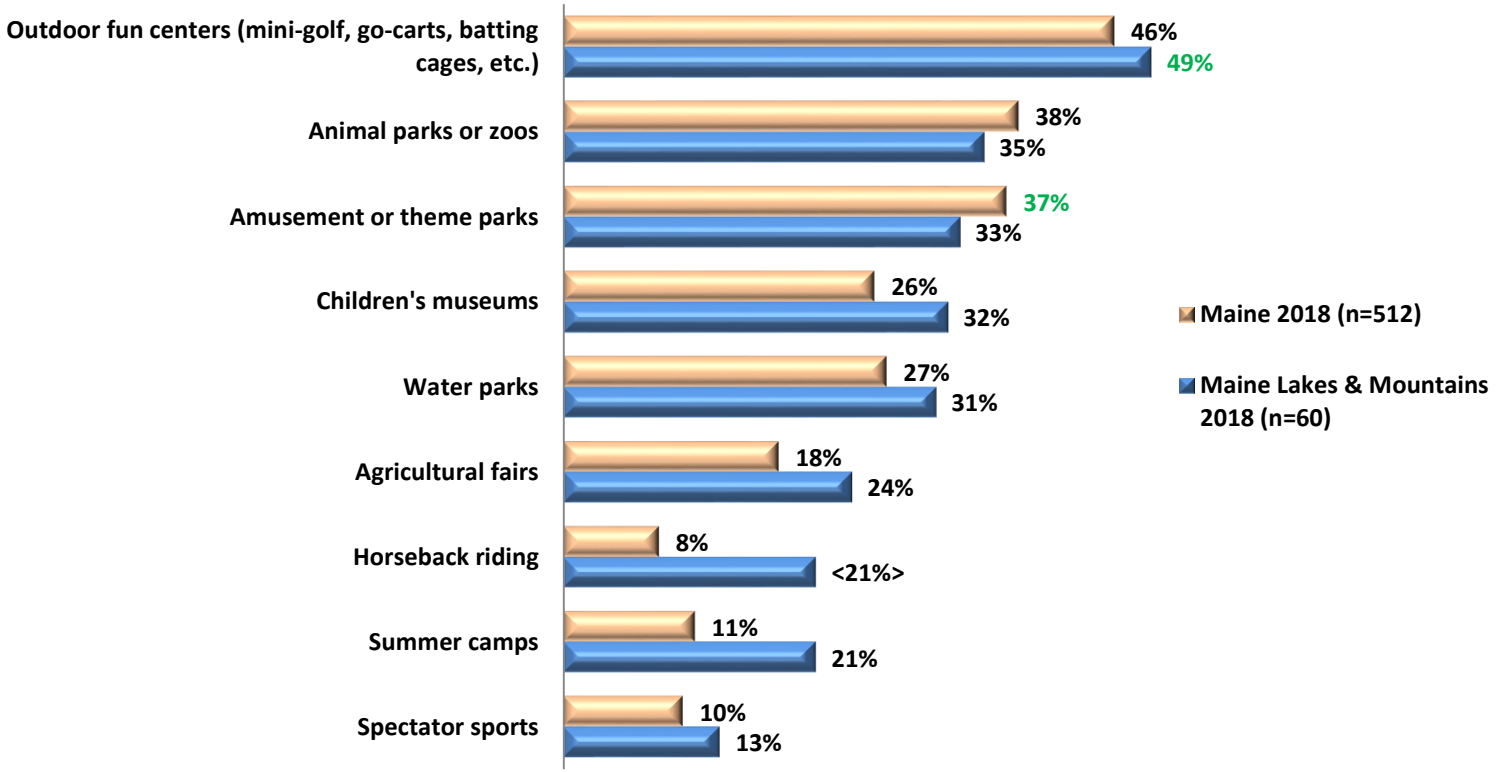
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates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

Visiting outdoor fun centers was the most common family fun activity in the region, though many other activities were also relatively popular for families.

- Outdoor fun centers were much more common in the region in 2018 (49%) than in 2017 (when 24% visited such centers).
- Day visitors to the region were more likely than visitors statewide to go for a horseback ride.

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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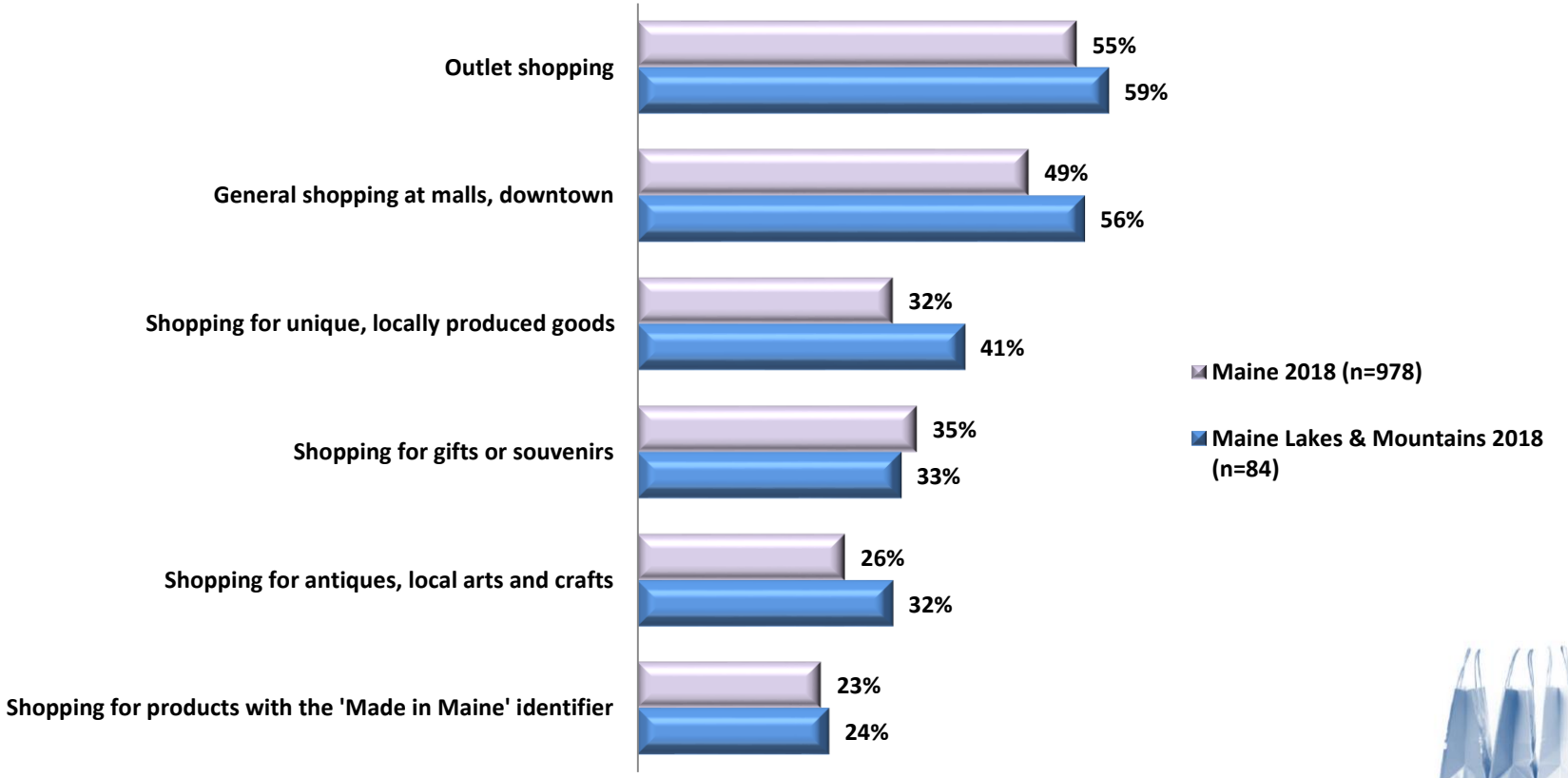
Outlet shopping and general shopping in malls or downtown areas were the most common shopping activities, though shopping for a variety of specific items was common as well.

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.*
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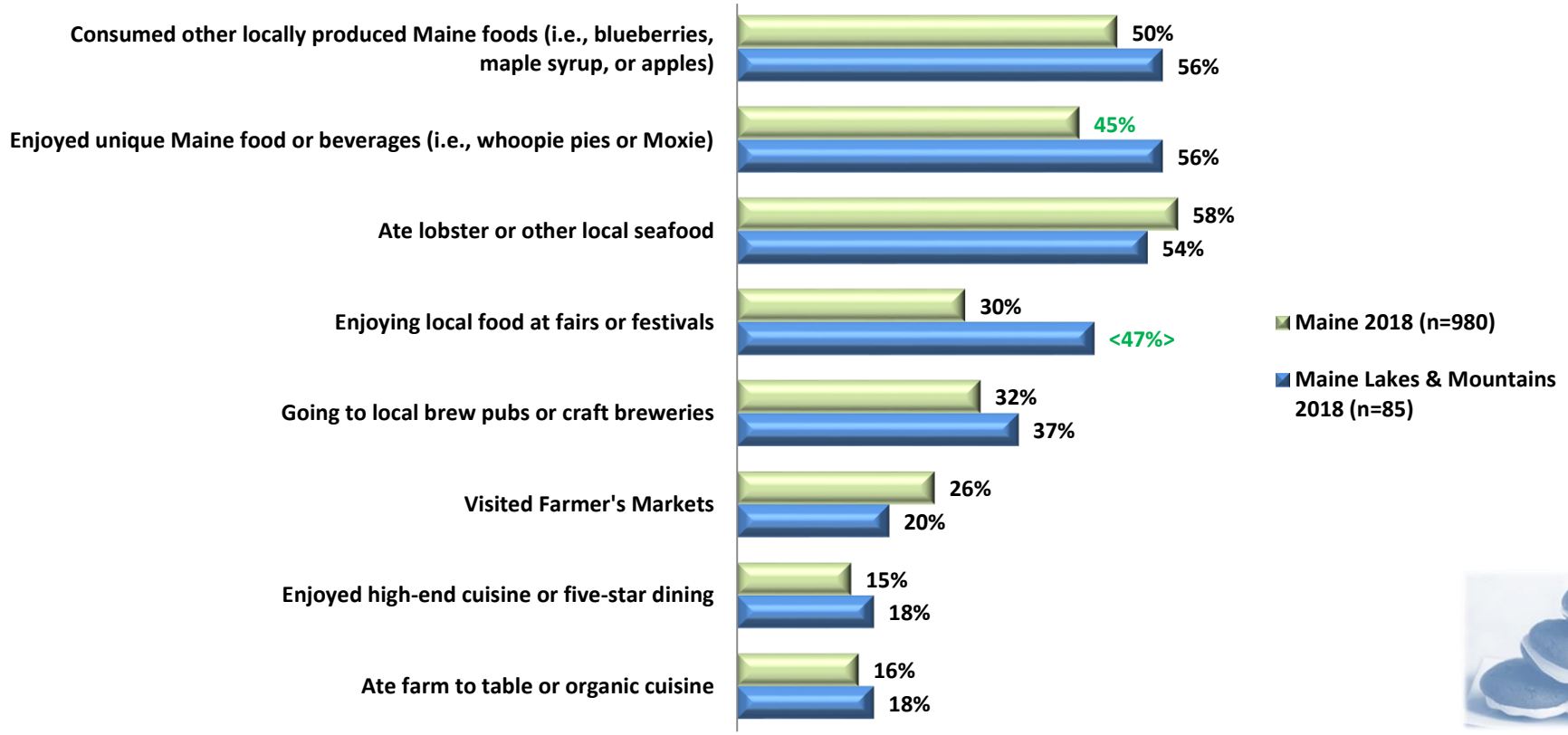
Eating local or unique Maine foods (including seafoods and other fare) and eating at local festivals were the most common culinary activities in the region.

- Enjoying local foods at fairs or festivals gained in popularity in the region between 2017 (24%) and 2018 (47%), and was significantly more popular in the region than across the state generally.

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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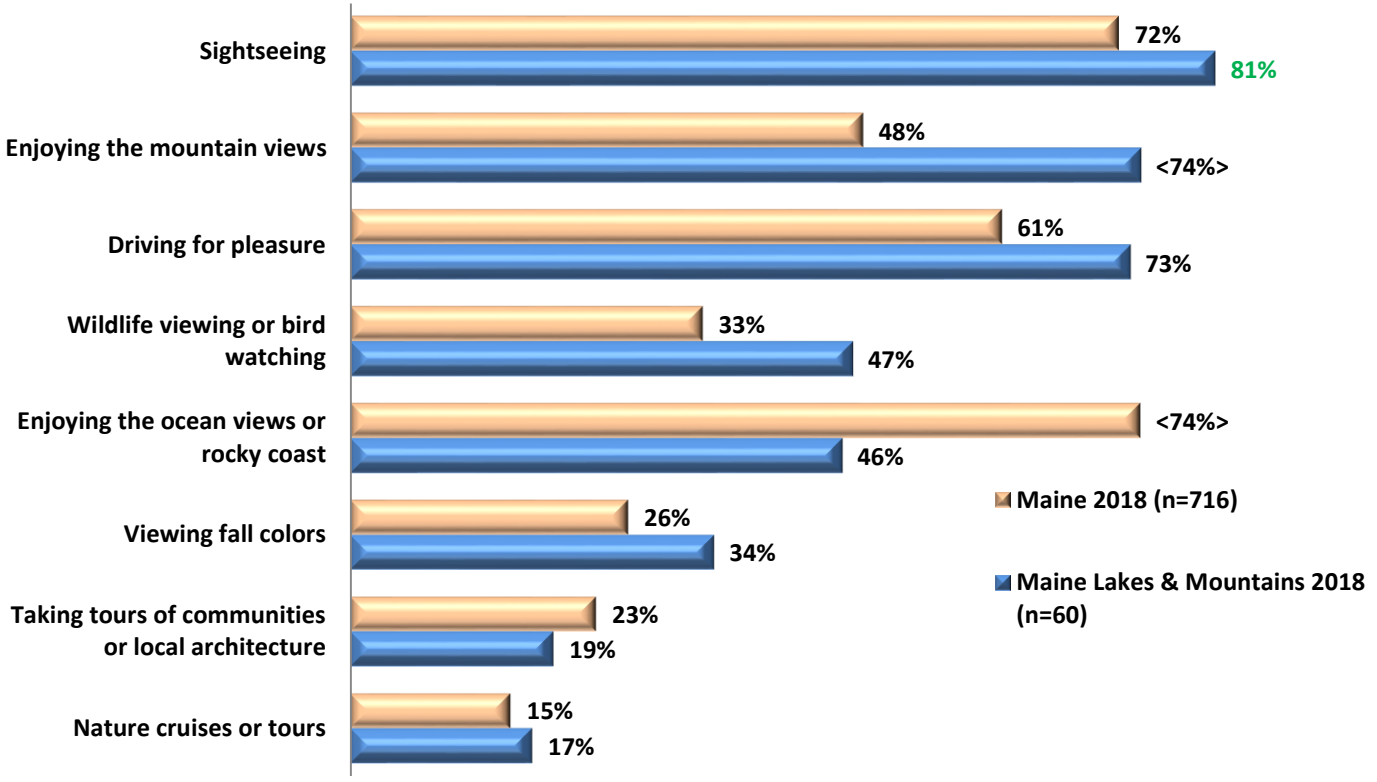
Sightseeing generally, enjoying the mountain views, and driving for pleasure were the most common sightseeing activities for day visitors to the region, though many did view wildlife or see the ocean.

- Not surprisingly, enjoying mountain views was significantly more common among day visitors in the region than it was among day visitors statewide, while enjoying views of the rocky coast was less common.

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.*
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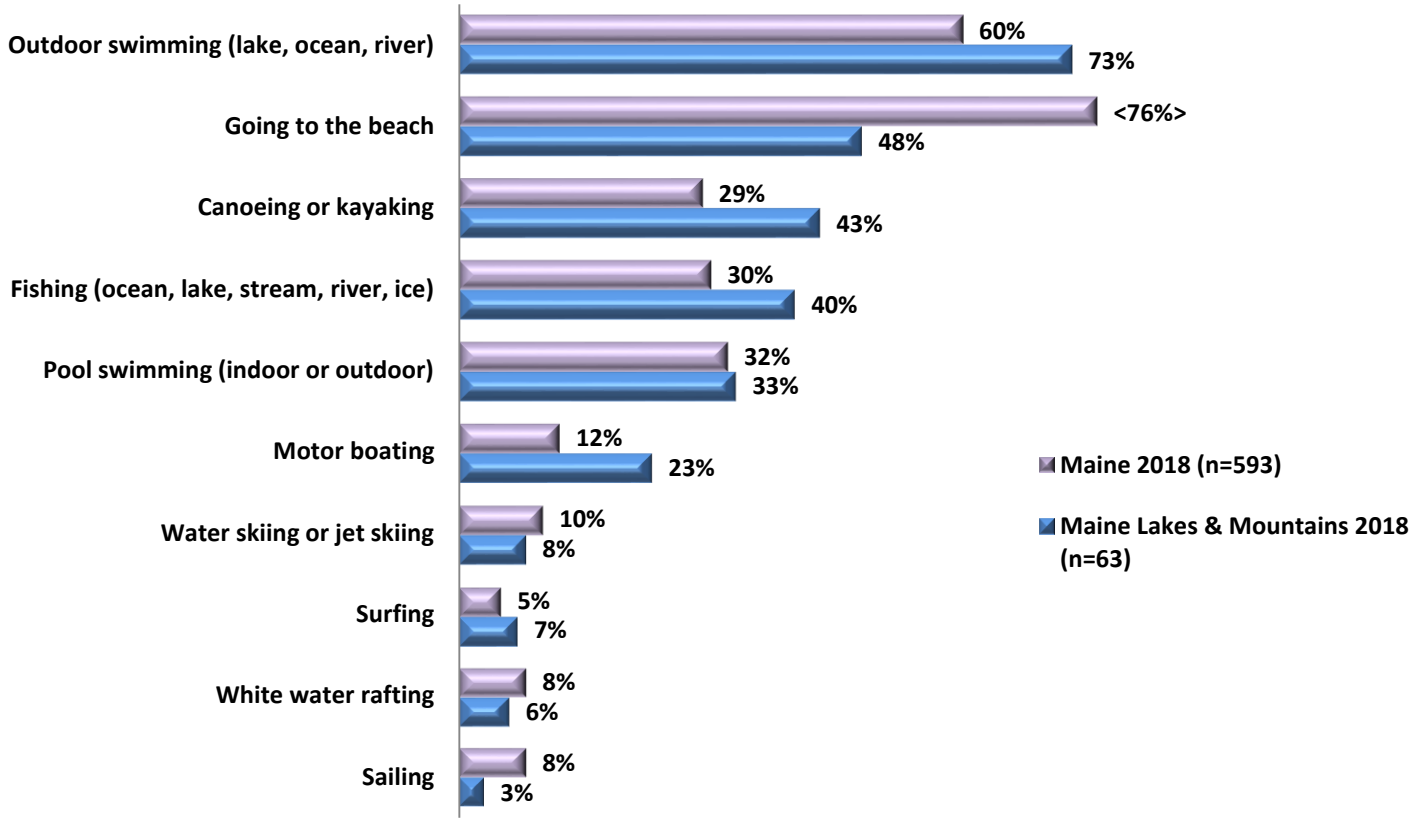
Swimming outdoors was the most common water activity in the Lakes & Mountains region, though many enjoyed going to the beach, canoeing or kayaking, fishing, swimming in pools, or motor boating.

- Going to a beach was less common among day visitors to the region than it was among day visitors statewide.

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.*
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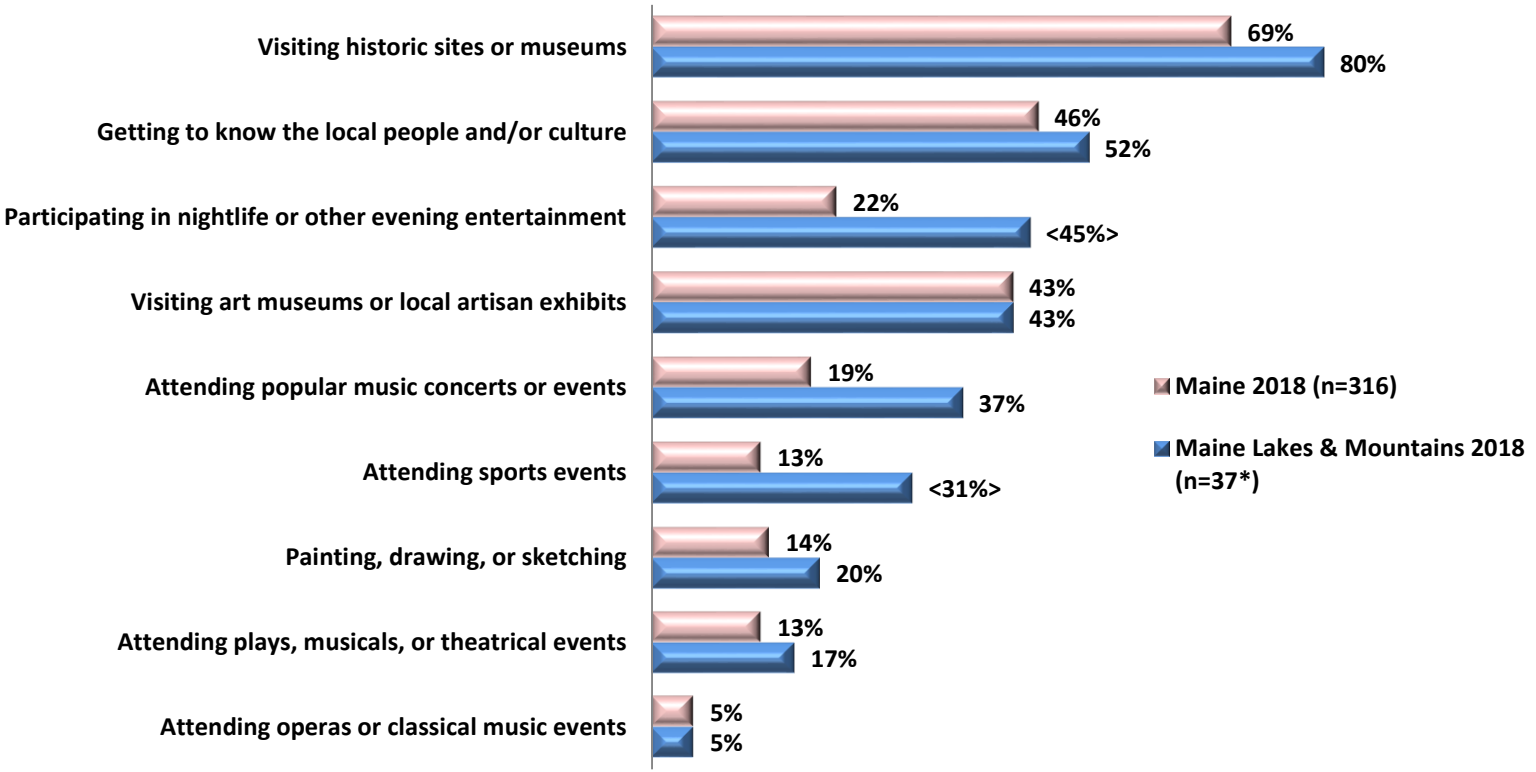
Among the few day visitors to the region who had an interest in culture, visiting historic sites or museums was the most popular cultural activity, though many engaged in other related activities as well.

- With a casino in its borders, visitors to the region were more likely to engage in nightlife activities than were travelers to the state as a whole.
- Attending sporting events was also more common in the region than across 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.*
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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.

A variety of attractions were popular for day visitors to the region in 2018.

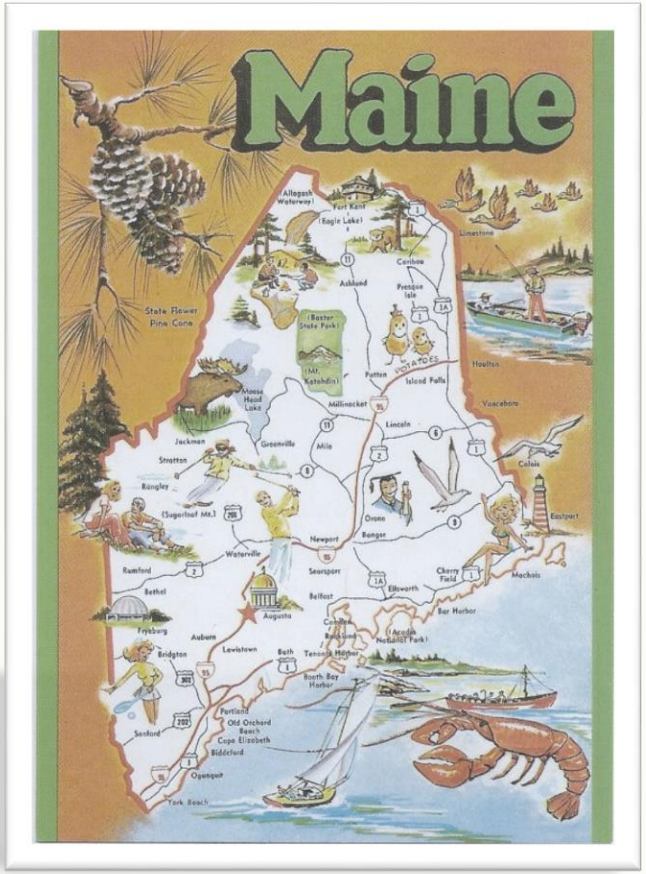
% VISITING

TOP DESTINATIONS		LESS POPULAR DESTINATIONS*	
23%	Sebago Lake State Park	8%	Sugarloaf Mountain
22%	Oxford Casino	8%	Maine Beer Trail
21%	Maine Wildlife Park	8%	Saddleback Mountain
19%	White Mountain National Forest	8%	Thorncrag Bird Sanctuary
18%	Long Lake	7%	Rangeley Outdoor Sporting Heritage Museum
18%	Rangeley Lakes	7%	Stanley Museum
17%	Grafton Notch State Park	6%	Maine Mineral and Gem Museum
13%	Sunday River Ski Resort	6%	Shaker Village
13%	Artist's Covered Bridge	6%	McLaughlin Gardens
9%	Black Mountain	5%	Maine Huts & Trails
9%	Pineland Farms	5%	Lovejoy Covered Bridge
		5%	Poland Spring Preservation Park
		5%	Bates College Museum of Art
		5%	Museum L/A

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

(n=175)

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.

	Survey Instruments		
Research Objectives:	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

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