

Maine Office of Tourism
Visitor Tracking Research
2018 Calendar Year Annual Report



Regional Insights:
Maine Highlands



Prepared by



A Division of DRI

May 2019

Regional Insights: Maine Highlands

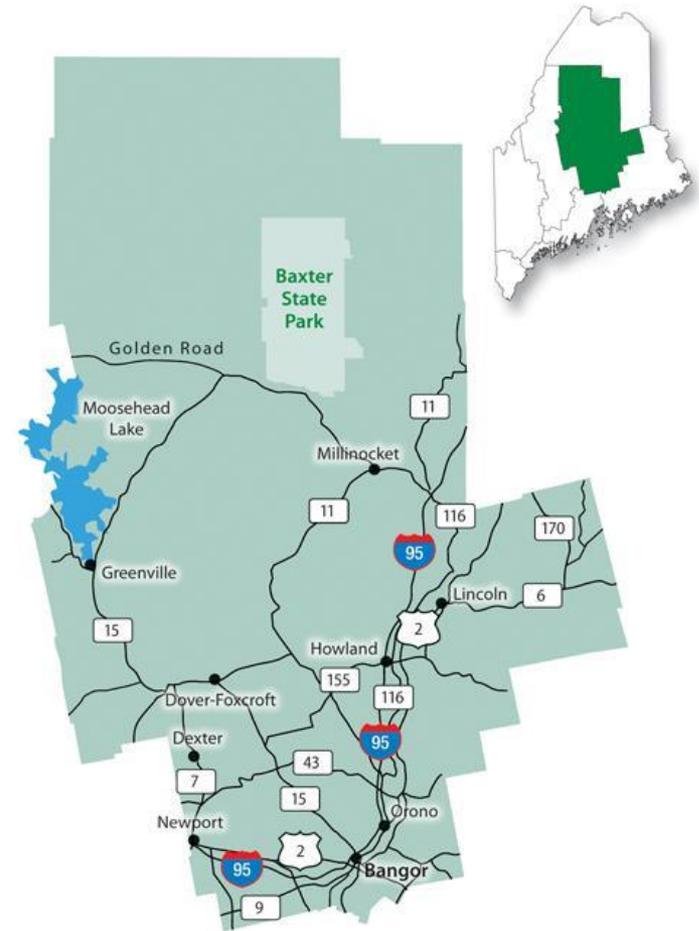
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Introduction

- This report provides a profile of visitors and their trips to the Maine Highlands tourism region during 2018, from a survey of:
 - 475 overnight visitors, and
 - 163 day visitors.
- Throughout this report, data for the Maine Highlands 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 Highlands 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 Maine Highlands: How They Are Unique



Comparisons: Region vs. State

- Visitors to the Maine Highlands 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,
 - Their areas of origin, and
 - The activities they participated in while visiting.

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

Visitor Demographics

Visitors to the Maine Highlands region, compared to visitors statewide, were...

Overnight Visitors

More likely to be first-time visitors.

More likely to be from Canada.

Younger, on average.

More likely to be employed full-time.

Day Visitors

More likely to be first time-visitors.

Less likely to be from Massachusetts, New Hampshire, or Vermont, and **more** likely to be Maine residents.

Trip Interest Areas

Visitors to the Maine Highlands region, compared to visitors statewide, were...

Overnight and Day Visitors

Less likely to have an interest in water activities.

Overnight Visitors

Less likely to cite outdoor recreation as the primary reason for their leisure trip.

Trip Interests and Importance (Travel Driver Index)

Visitors to the Maine Highlands region, compared to visitors statewide, were...

Overnight and Day Visitors

Less likely to have their trips driven by water activities.

Trip Activities

Visitors to the Maine Highlands region, compared to visitors statewide, were...

Overnight Visitors

More likely to:

- Ride horses,
- Ride all-terrain vehicles,
- Snowshoe,
- Water ski or jet ski,
- White water raft, and
- Paint, draw, or sketch.

Less likely to:

- Go to the beach,
- Go for a pleasure drive,
- Enjoy coastal/ocean views,
- Eat lobster or other seafood, and
- Consume other local foods.

Trip Activities

Visitors to the Maine Highlands region, compared to visitors statewide, were...

Day Visitors

More likely to:

- Shop in malls or downtown areas,
- Snowmobile,
- Canoe or kayak, and
- Go fishing.

Less likely to:

- Go to the beach,
- Enjoy coastal/ocean views,
- Eat lobster or other seafood, and
- Visit a historic site or museum.

Visitation and Economic Impact Summary



Visitation and Economic Impact Summary: Maine Highlands

Maine Highlands



An estimated **5.31 million** travelers visited the Maine Highlands region in 2018 ~ a **15.6% increase** over 2017.

2017 Total
4.60 million

(10.6% of All Maine Visitors)

2018 Total
5.31 million

(11.7% of All Maine Visitors)

Number of Visitors to the Maine Highlands Region

* Percent of estimated total
Maine day visitors

1.80 million
(7.8%)*

2.13 million
(8.6%)*

** Percent of estimated total
Maine overnight visitors

2.79 million
(13.8%)**

3.18 million
(15.5%)**

2017

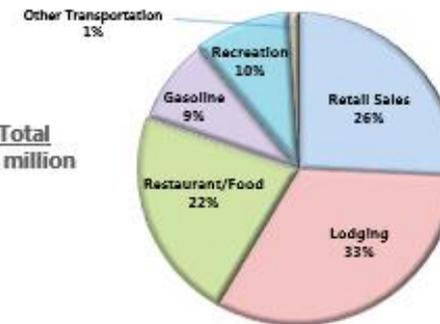
2018

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.

Maine Highlands

In 2018, Maine Highlands visitors spent **\$932.42 million** ~ up **12.6%** from 2017.

2018 Total
\$932.42 million



The \$932.42 million spent by visitors to the Maine Highlands 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, restaurants purchase new 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.

15,990 jobs

\$304.9 million
in total
earnings

\$85.3 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

- Surveyed overnight visitors to the Maine Highlands in 2018 were younger than overnight visitors statewide, with an average age of 36. Seven out of ten were working full-time, with an overall average annual income of \$88,000.
- Half of surveyed visitors to the region were married. Two out of three had a college degree or more education.

	Maine 2018 (n=2901)	Maine Highlands 2018 (n=475)
Age:		
< 35	46%	<54%>
35 - 44	23%	24%
45 - 54	14%	12%
55 +	<17%>	9%
Mean	<39.0>	35.9
Income:		
< \$50,000	27%	26%
\$50,000 - \$99,999	43%	45%
\$100,000 +	30%	29%
Mean	\$86,400	\$88,200
Female	<66%>	61%
College degree or higher	65%	64%
Married	47%	50%
Employed full-time	62%	<68%>

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

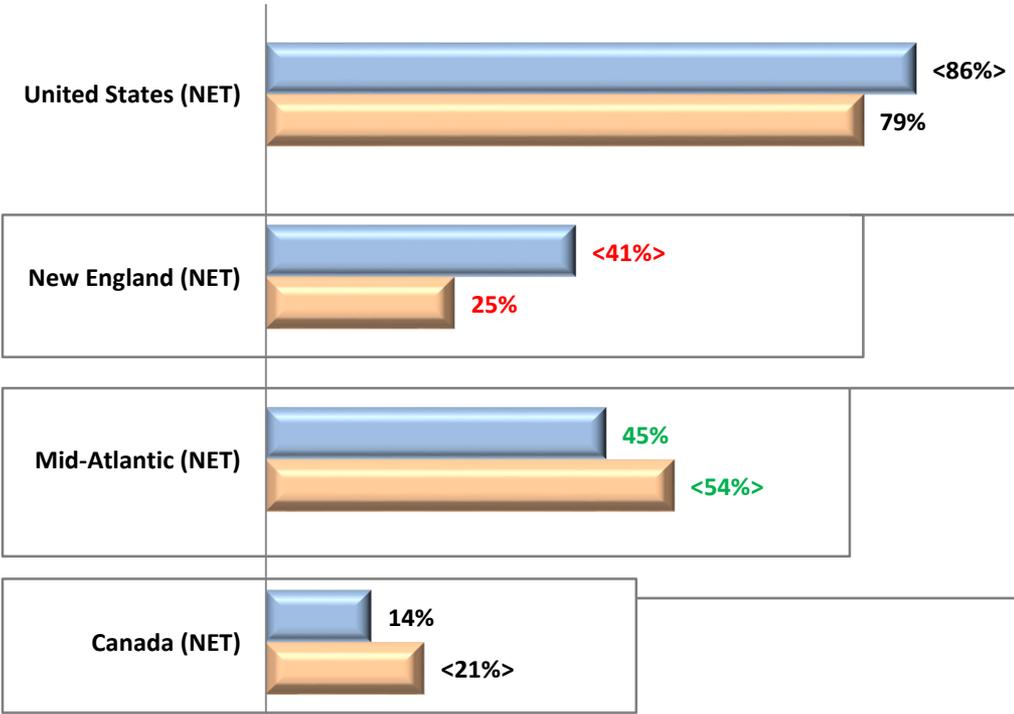
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Eight out of ten overnight visitors to the Highlands in 2018 came from the U.S., with a slim majority coming from the Mid-Atlantic.

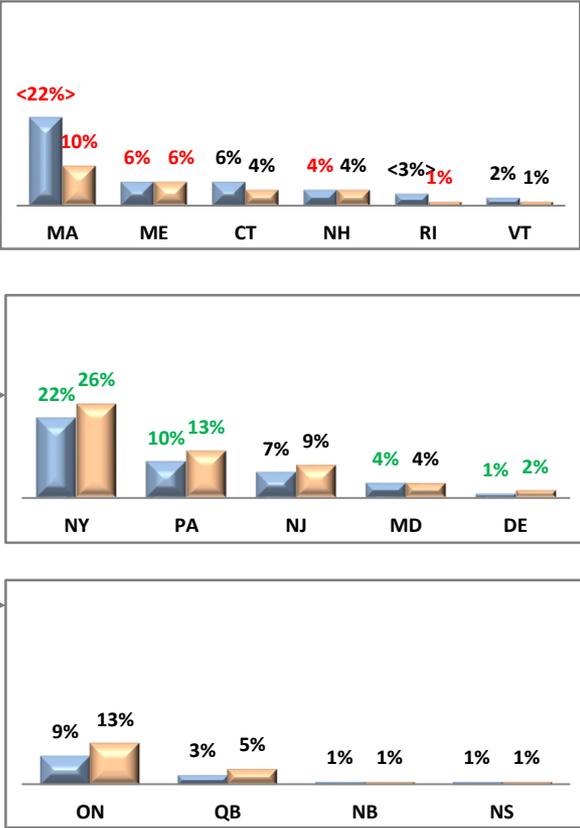
- Compared to the state as a whole, the Highlands region received a larger share of visitors from the Mid-Atlantic states and Canada.

LOCATION OF RESIDENCE*

■ Maine 2018 (n=2901) ■ Maine Highlands 2018 (n=475)



STATE/PROVINCE OF RESIDENCE



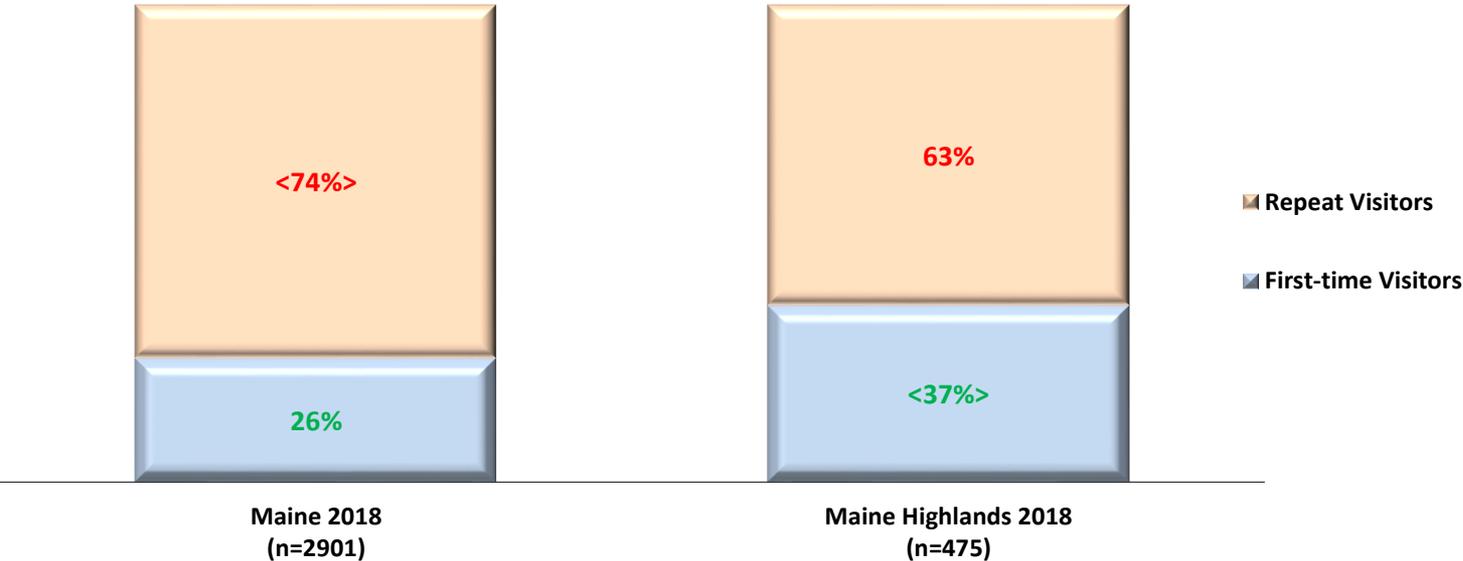
*Regions/states/provinces of residence reported here reflect the geographic target area included in the Visitor Profile surveying. Though people from other areas of the country do visit Maine, this study only includes those residing in Maine's core advertising markets.

<> 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.

Almost four out of ten overnight visitors to the Highlands were traveling to Maine for the first time in 2018.

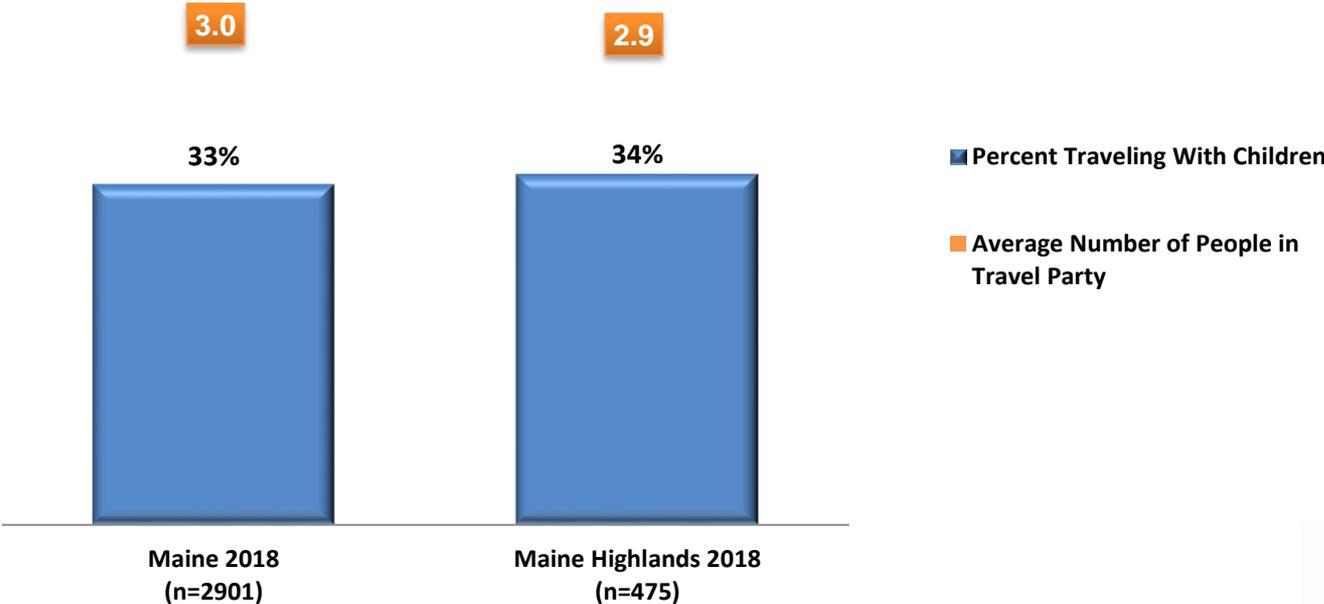
➤ The Highlands attracted a greater share of overnight first-time visitors than the state as a whole.

REPEAT VS. FIRST-TIME VISITORS



The average overnight traveler to the region came in a party of three people. One-third of parties included children.

TRAVEL PARTY SIZE AND COMPOSITION

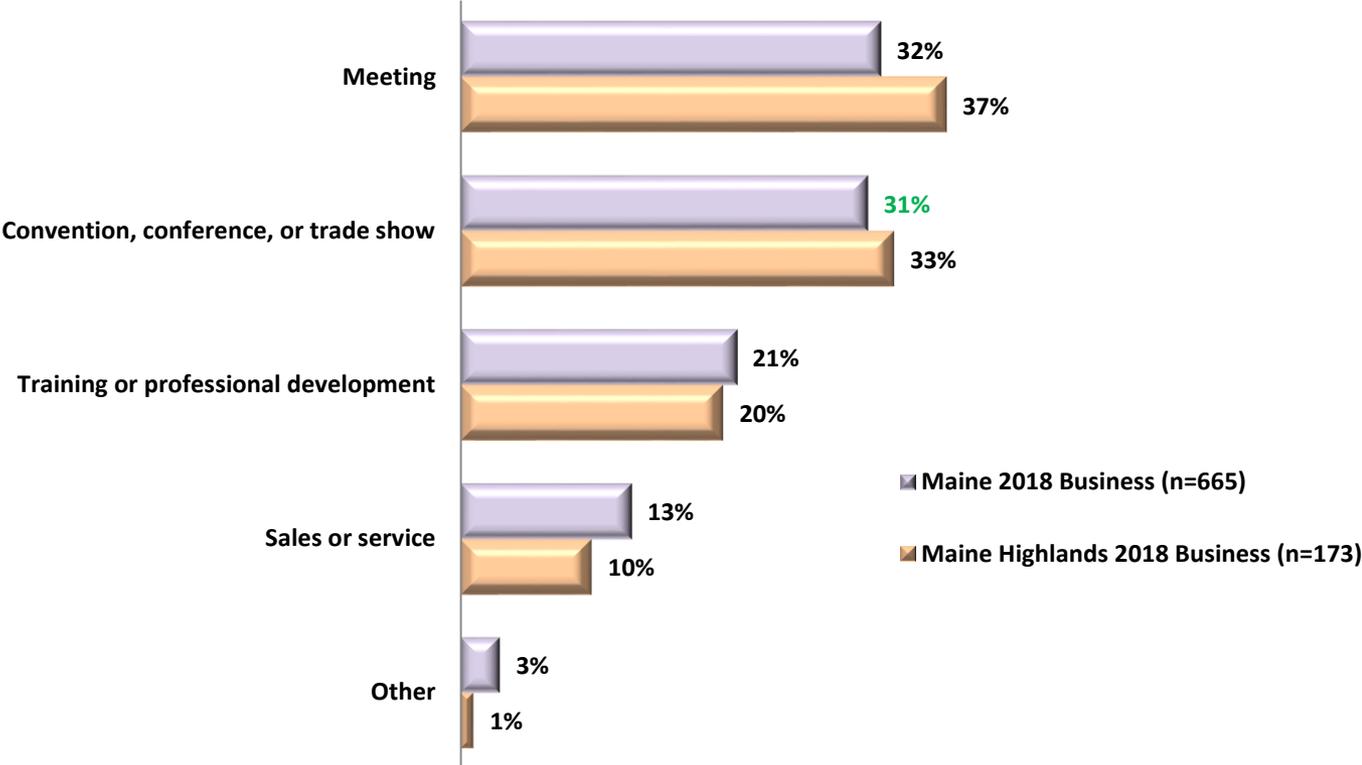




Overnight Visitors: Trip Experience

Meetings and conventions were the most common reasons overnight business travelers came to the Highlands region in 2018.

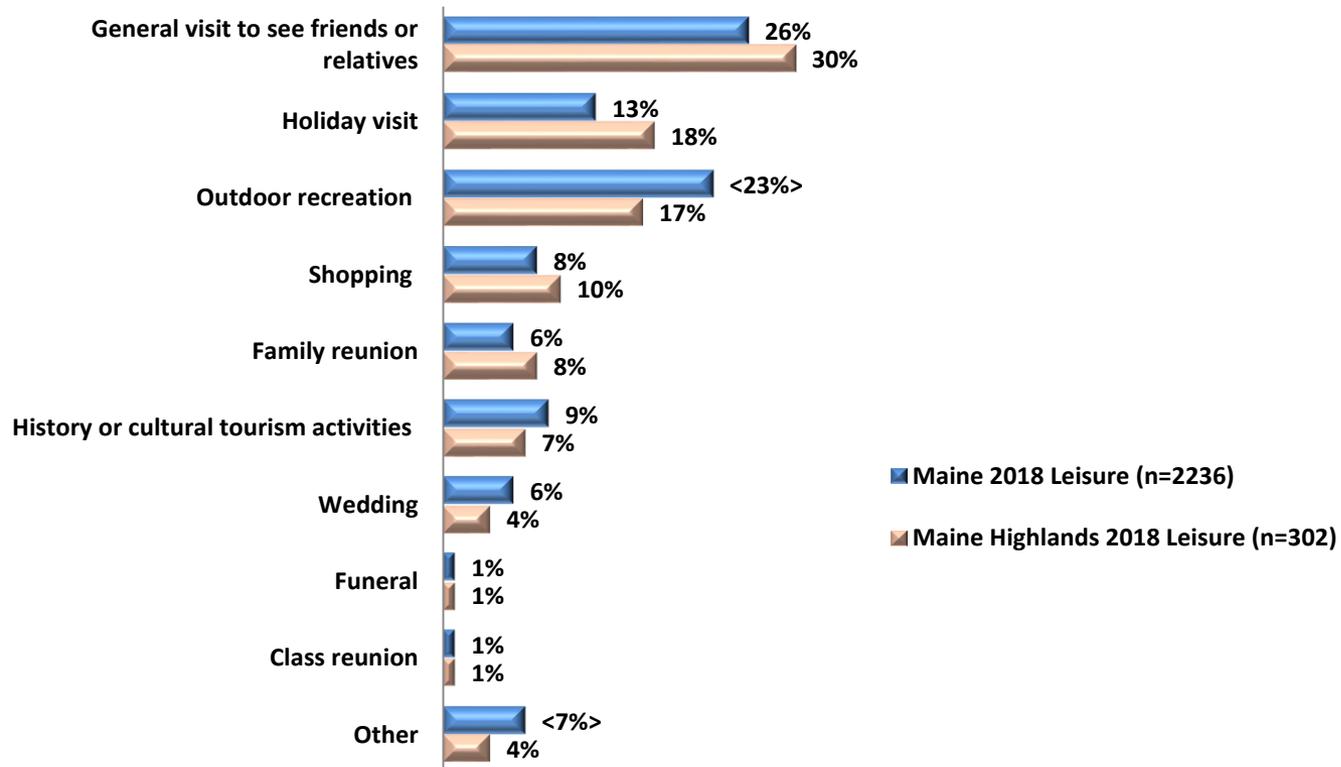
PRIMARY PURPOSE OF OVERNIGHT BUSINESS TRIPS



Visiting friends and family was the most common purpose of overnight leisure trips to the region, followed by holiday visits and outdoor recreation.

- Highlands overnight visitors were less likely than such travelers statewide to be visiting primarily for outdoor recreation.

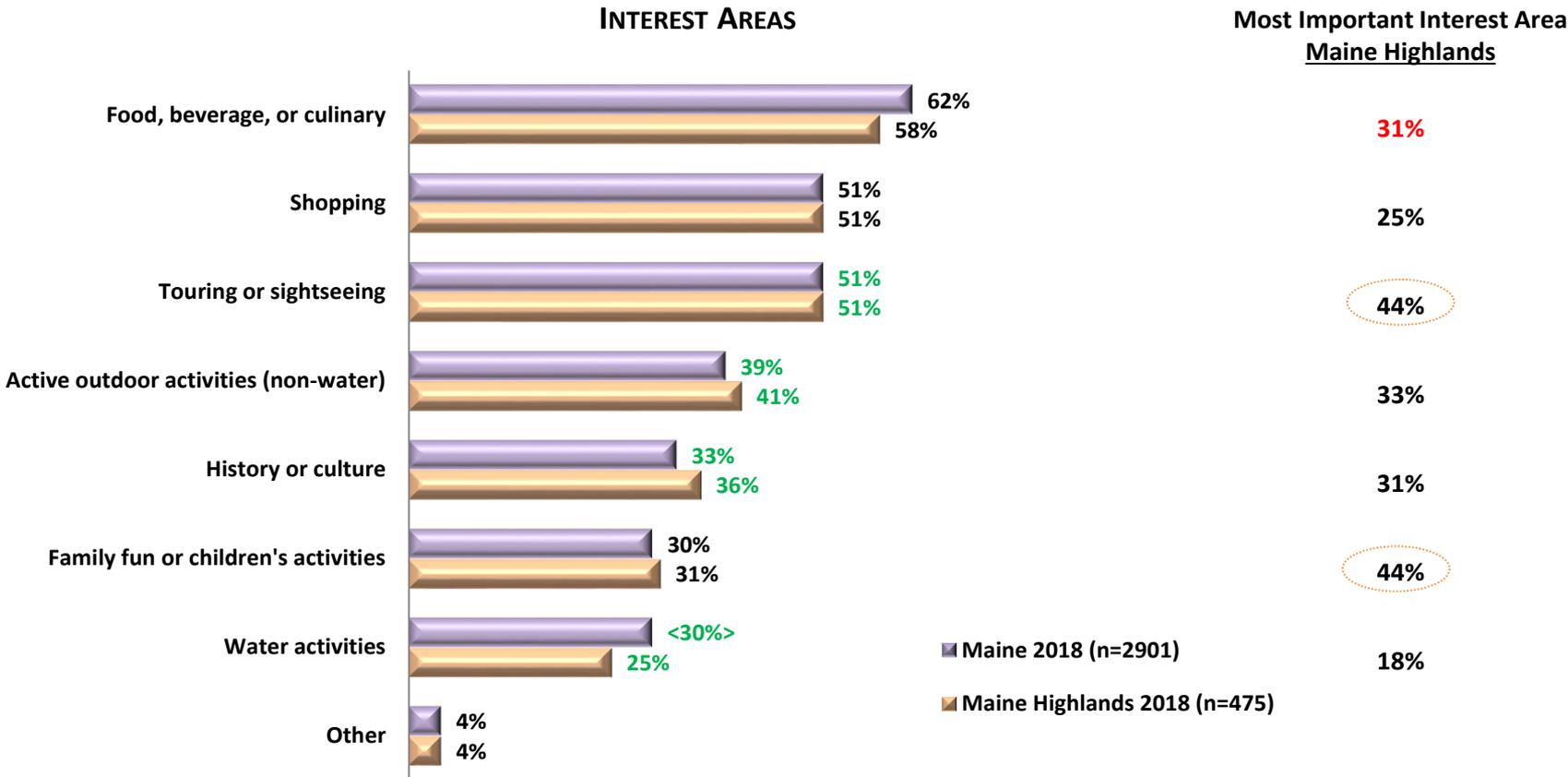
PRIMARY PURPOSE OF OVERNIGHT LEISURE TRIPS



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.

Culinary pursuits were the *most popular* interests for overnight visitors to the Highlands, followed by shopping and sightseeing. Sightseeing and family fun were the most likely to be considered the *most important* interests.

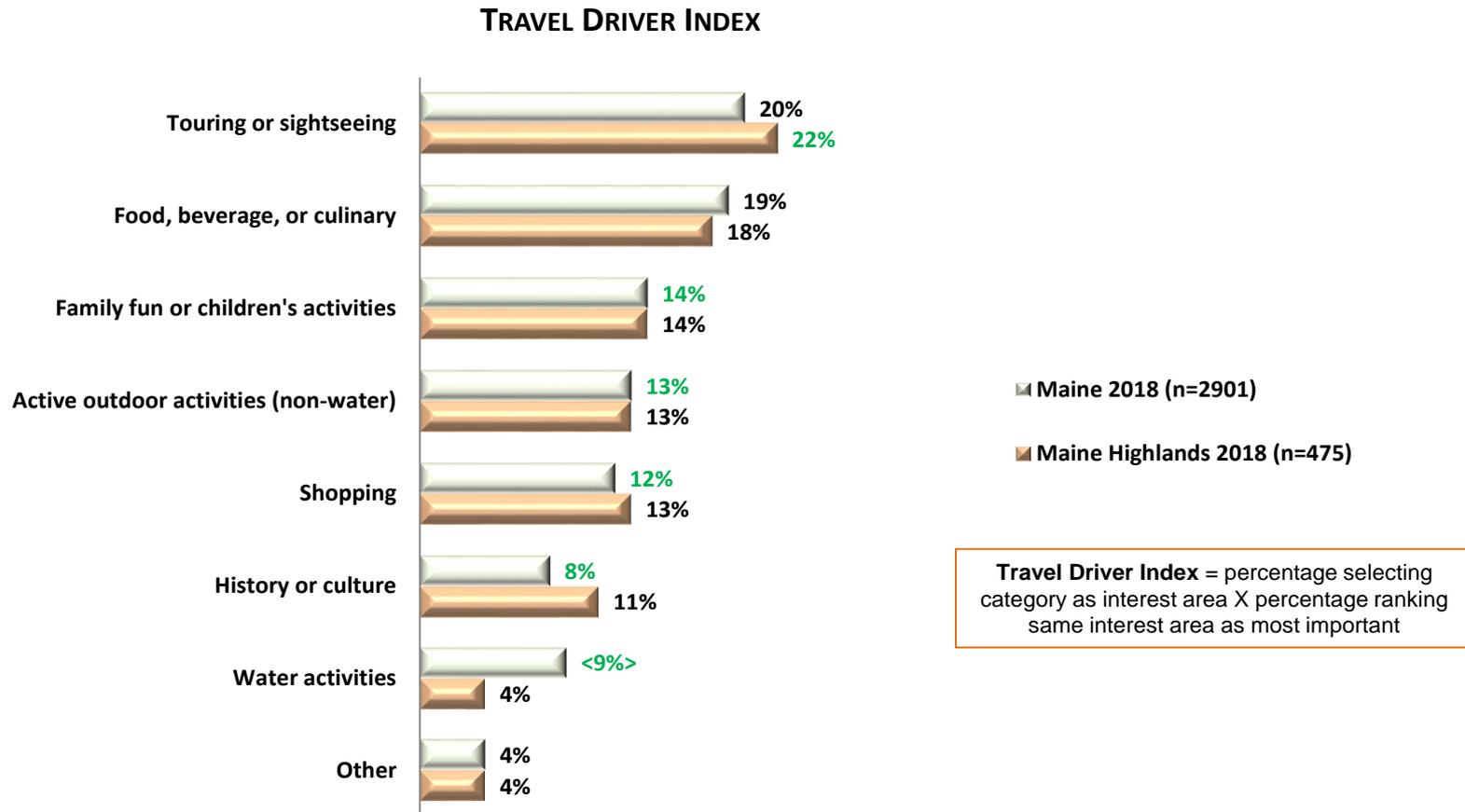
➤ Water activities were less popular among overnight visitors to the Highlands than among overnight visitors statewide.



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. 22
 <> 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 Travel Driver Index, a measure that combines both interest and importance for trip interest areas, suggests that sightseeing and culinary pursuits were the primary drivers of overnight visits to the Highlands in 2018.

- Water activities were less influential for overnight visitors to the region than for overnight visitors statewide.

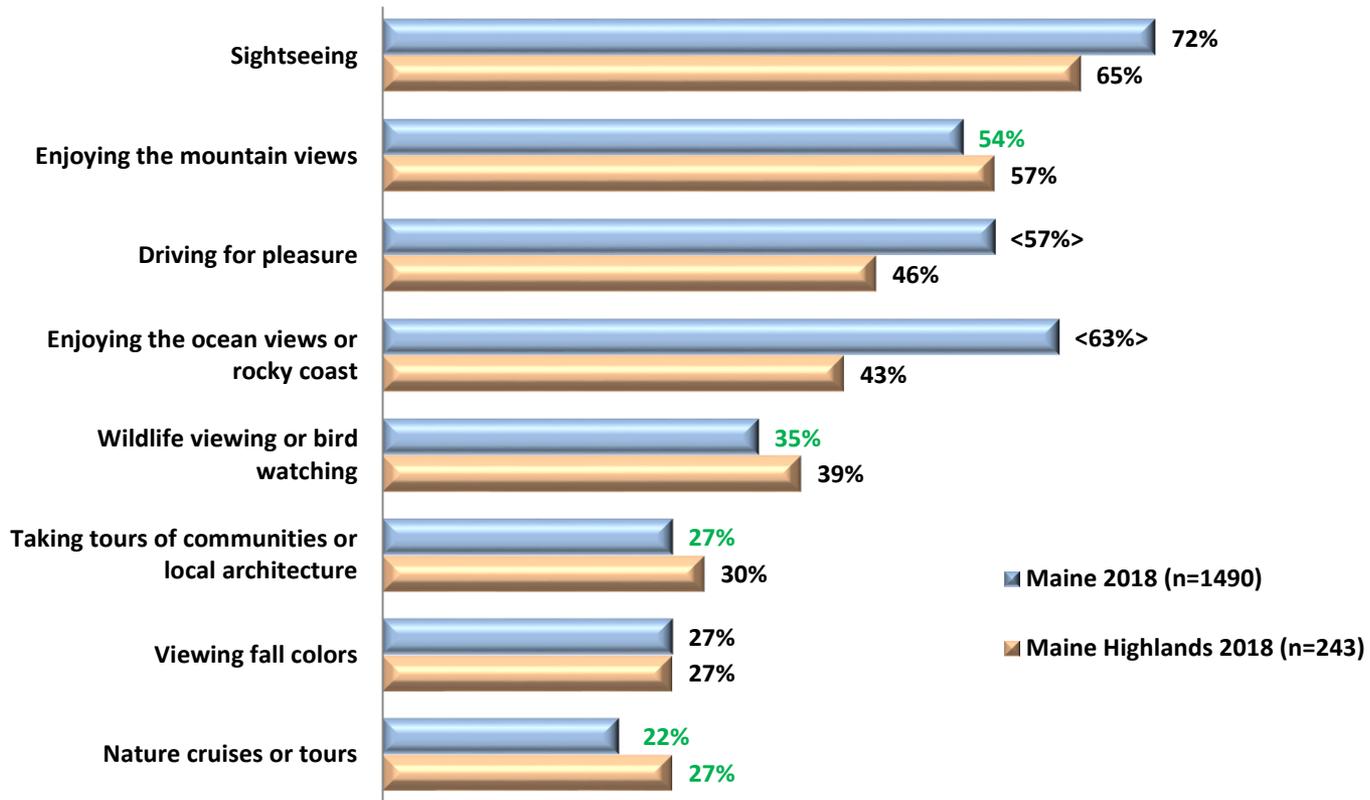


Overnight visitors to the Highlands engaged in a number of sightseeing activities in 2018, most often sightseeing generally and enjoying the mountain views, followed by driving for pleasure, enjoying coastal views, and wildlife watching.

- Driving for pleasure and enjoying coastal views were significantly less common among overnight visitors to the Highlands as compared to overnight visitors statewide.

TOURING OR SIGHTSEEING ACTIVITIES

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



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

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

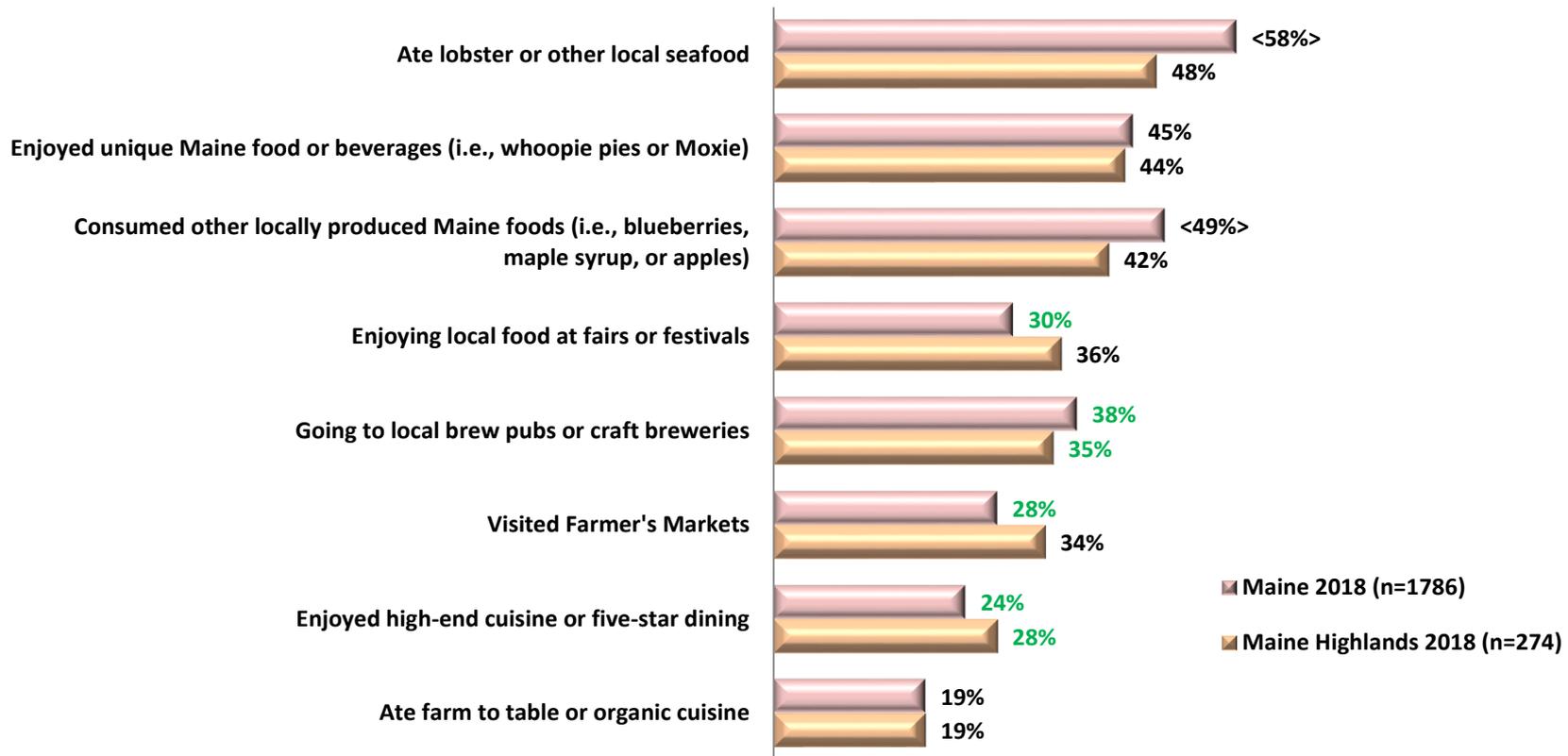
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight visitors engaged in a variety of culinary activities in the region, most often eating seafood, experiencing uniquely Maine foods, and consuming other local foods.

- Eating seafood and consuming other locally produced foods were less common among overnight visitors to the region than among such visitors statewide.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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

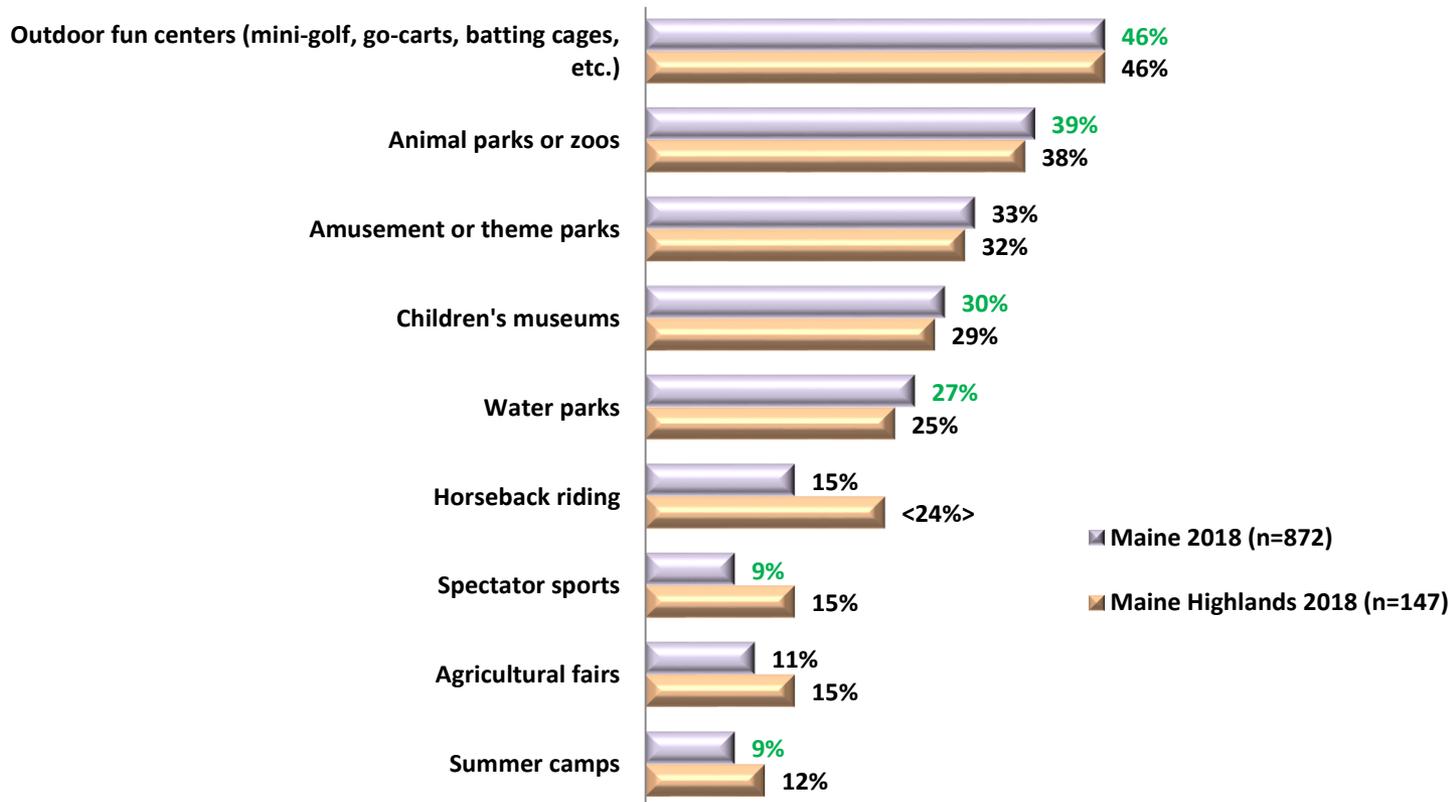


Outdoor fun centers were the most popular family-oriented activity among overnight travelers to the Highlands, though animal parks, amusement parks, children’s museums, water parks, and horseback riding were also relatively popular.

- Compared to overnight visitors across the state, those staying in the Highlands were more likely to go horseback riding.

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.

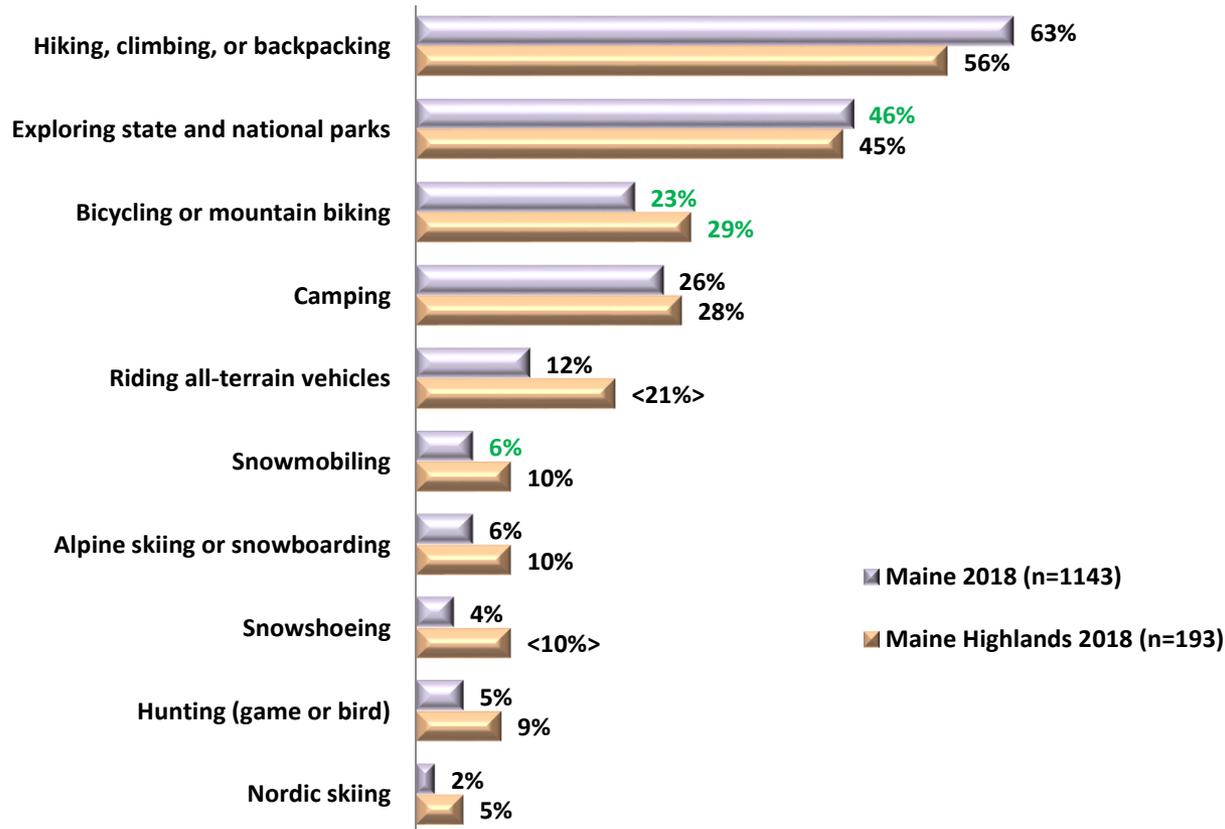
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Similar to overnight visitors statewide, those interested in active outdoor (non-water) activities were most likely to go hiking/backpacking and to explore public parks.

- Riding all-terrain vehicles and snowshoeing were more common among overnight travelers to the region than among overnight travelers to the state as a whole.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

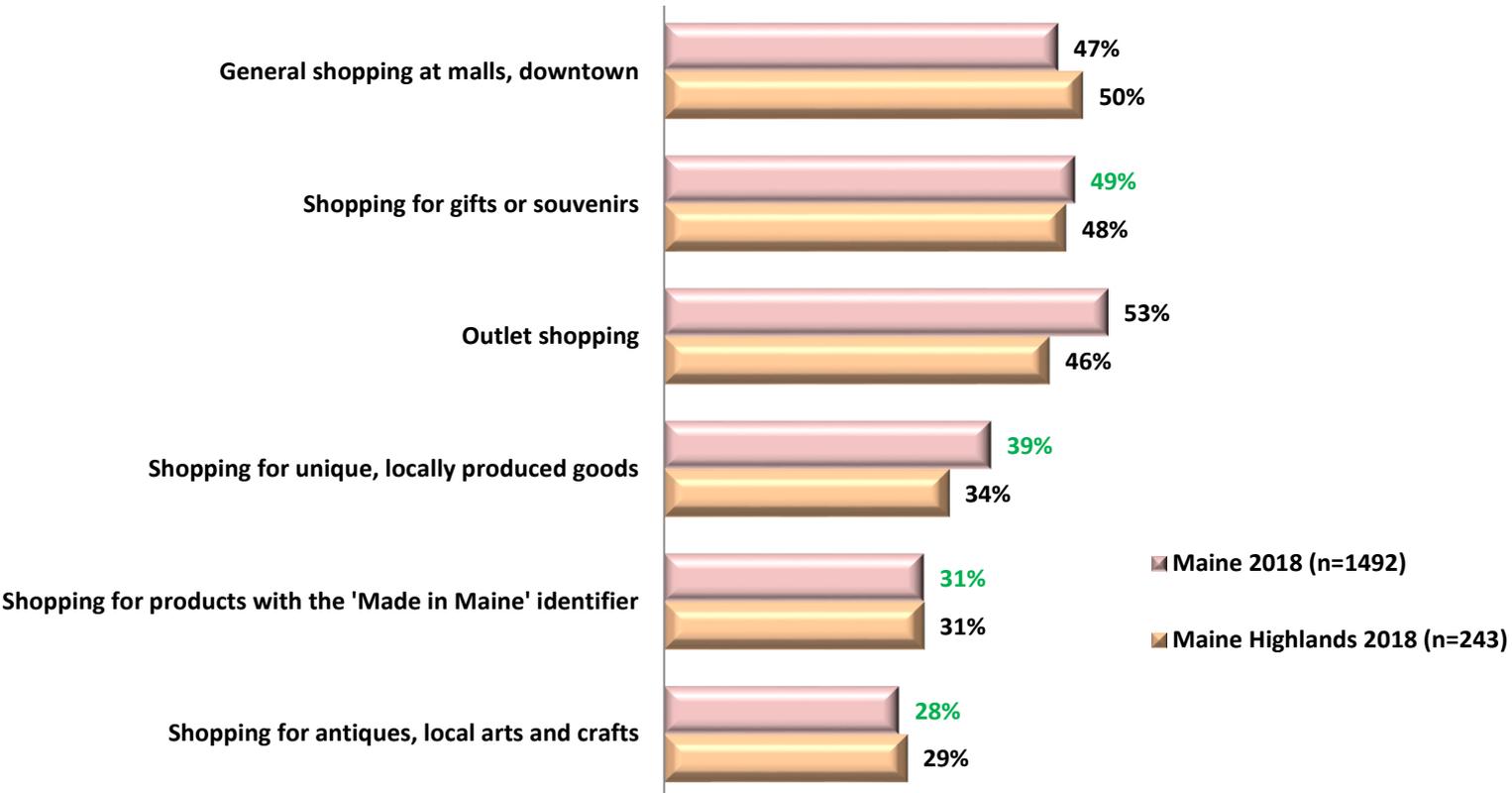
(Base: Those who report outdoor activities as an interest area for their Maine trip)



Shopping in malls or downtown areas, shopping for gifts or souvenirs, and outlet shopping were the most common shopping activities in the region and the state, though other forms of shopping were also relatively popular.

SHOPPING ACTIVITIES

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



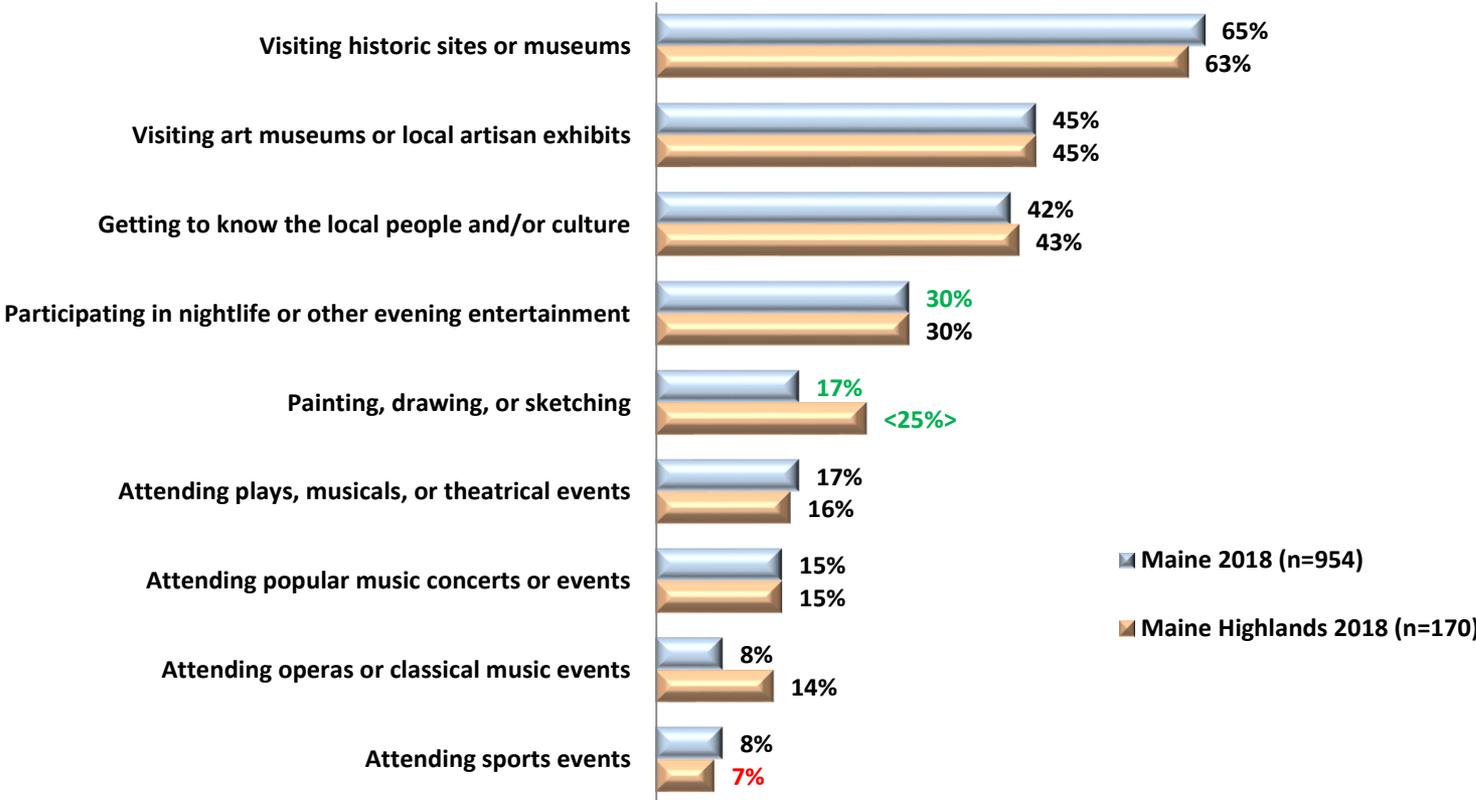
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
<> indicates a significant difference between this region and the State at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates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

Visiting historic sites and museums was the most common cultural activity among overnight travelers to the region, followed by visiting art exhibits and learning about the culture. Nightlife and artistic pursuits were also popular.

➤ Painting, drawing, and sketching were more common among overnight visitors to the Highlands than among such travelers statewide.

HISTORY OR CULTURE ACTIVITIES

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



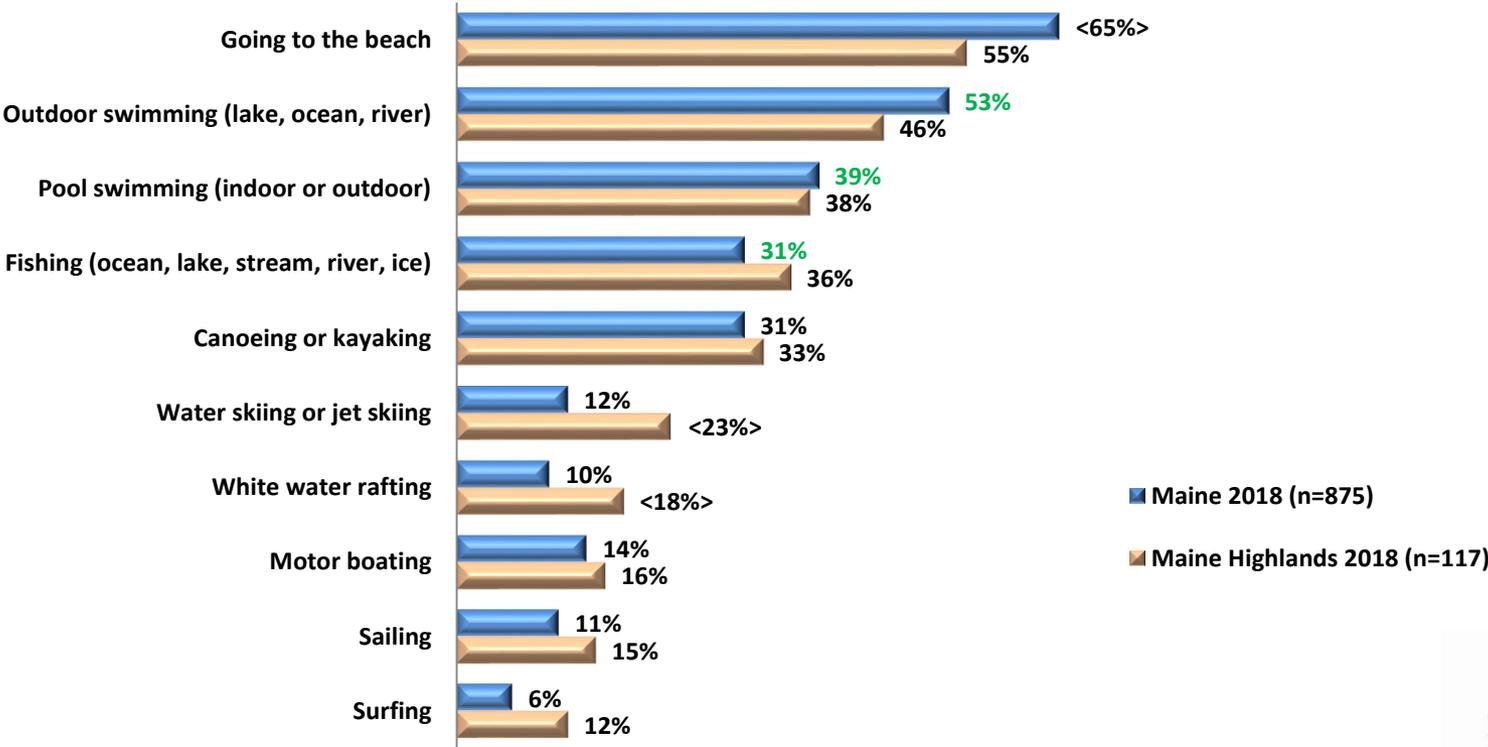
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*
 <> indicates a significant difference between this region and the State at the 95% confidence level.
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Going to the beach was the most common water activity among overnight visitors to the Highlands region in 2018, followed by outdoor swimming. Many also swam in pools, fished, or canoed or kayaked in the region.

- Perhaps predictably, overnight visitors to the region were less likely than overnight visitors to the state as a whole to go to the beach, but were more likely to go water skiing or jet skiing or white water rafting.

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.

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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.

The Bangor Mall and Baxter State Park were the most popular destinations in the Highlands region in 2018.

TOP DESTINATIONS		LESS POPULAR DESTINATIONS*	
34%	Bangor Mall	9%	Moosehead Marine Museum
29%	Baxter State Park	9%	Collins Center for the Arts
19%	Hollywood Casino	9%	Peaks Kenny State Park
18%	Moosehead Lake	8%	Cole Land Transportation Museum
18%	Maine Beer Trail	7%	Mt. Kineo
12%	Maine Discovery Museum	7%	Gulf Hugas
12%	UMaine Museum of Art	6%	Maine Forest and Logging Museum
11%	Mt. Katahdin	6%	Penobscot Theatre
10%	Bangor Waterfront Concert Series	5%	Katahdin Iron Works
10%	Lily Bay State Park	5%	Page Farm & Home Museum
10%	Dysart's Restaurant and Truck Stop	5%	Thomas Hill Sandpipe
10%	Sebec Lake		

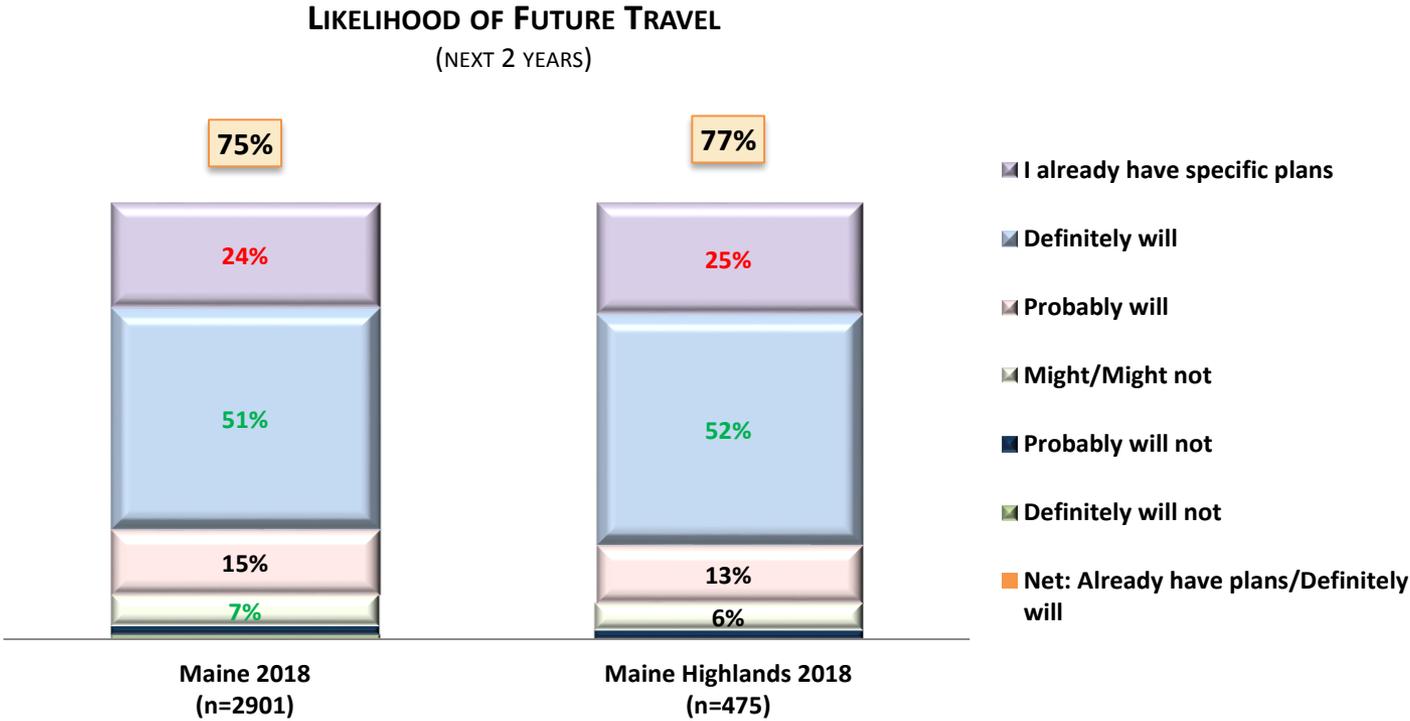
* Does not include options selected by fewer than 5% of responding visitors.

(n=475)

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.

Half of overnight visitors to the Highlands region in 2018 definitely will visit Maine again in the next 2 years, and at least one-quarter have already made definite plans to return.



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

- The average surveyed day visitor to the Maine Highlands in 2018 was in their early forties and had an income of \$67,000.
- Half were married, and about six out of ten were working full-time or had a college degree.

	Maine 2018 (n=1756)	Maine Highlands 2018 (n=163)
Age:		
< 35	37%	38%
35 - 44	18%	19%
45 - 54	16%	17%
55 +	28%	25%
Mean	43.0	41.5
Income:		
< \$50,000	38%	<48%>
\$50,000 - \$99,999	39%	36%
\$100,000 +	22%	17%
Mean	\$74,100	\$67,300
Female	78%	75%
College degree or higher	58%	58%
Married	49%	49%
Employed full-time	49%	57%

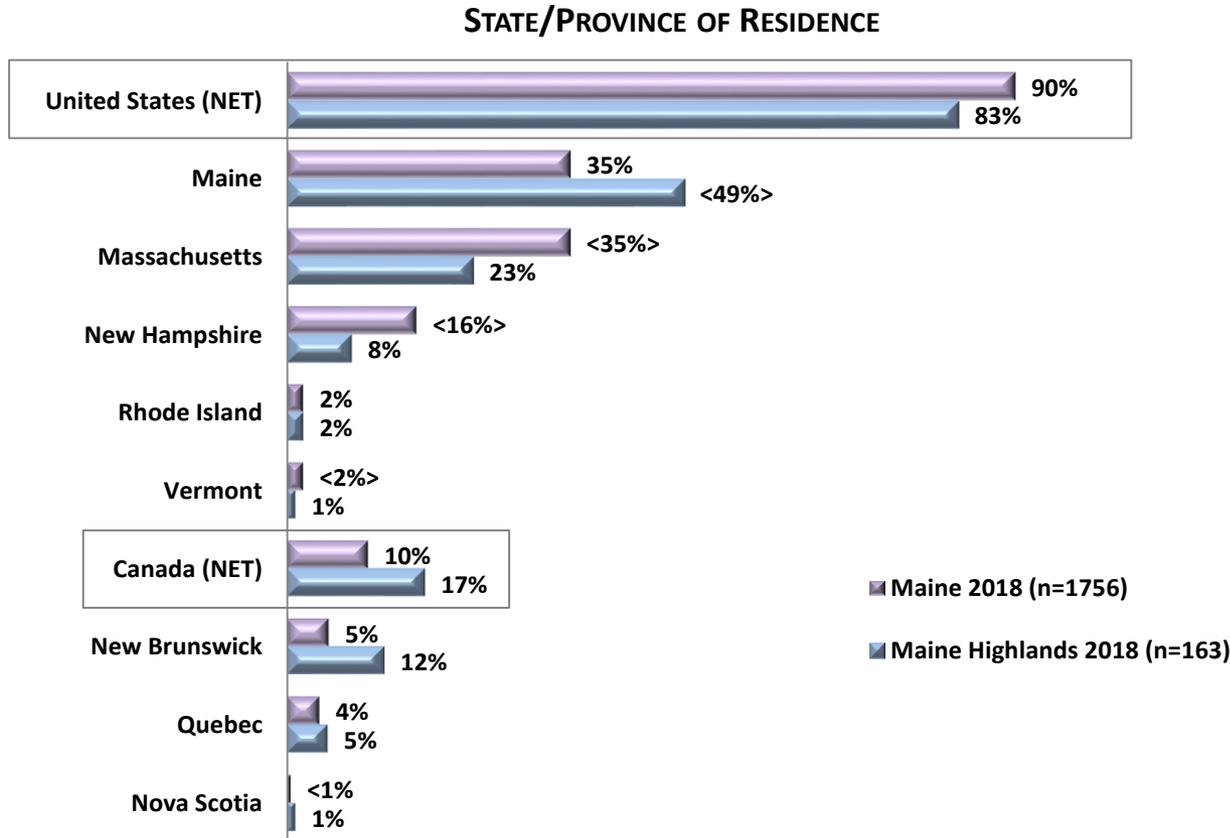
<> indicates a significant difference between this region and the State at the 95% confidence level.

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

Half of the day visitors to the Highlands in 2018 were Maine residents, and about one-quarter had traveled from Massachusetts.

Most of the region's Canadian visitors were from New Brunswick.

- Compared to statewide visitors, those who visited the region for the day in 2018 were more likely to be from Maine and less likely to be from Massachusetts or New Hampshire.



Q2. In what State or Province do you reside?

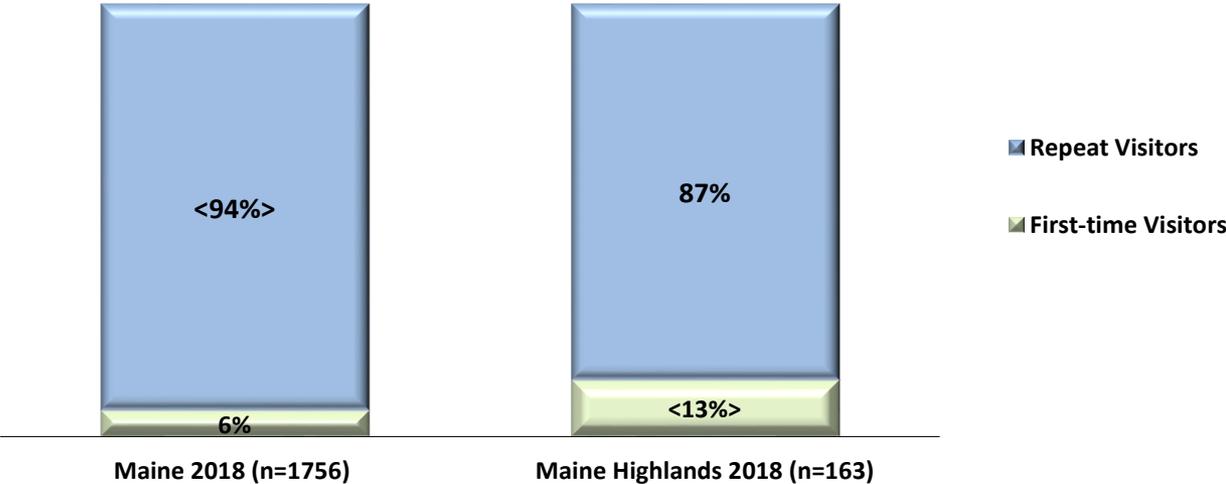
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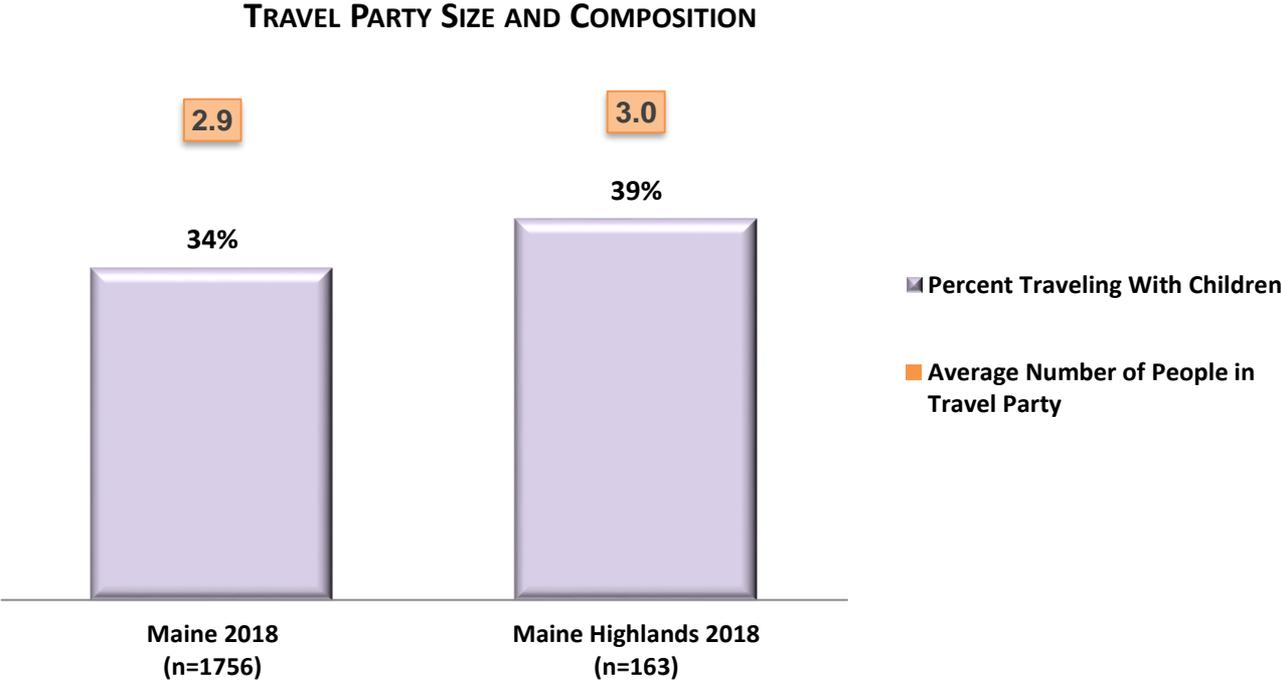
Roughly one out of ten day travelers to the Highlands region in 2018 were coming to Maine for the first time.

➤ Day visitors to the region were more likely than day visitors to the state overall to be coming to Maine for the first time.

REPEAT VS. FIRST-TIME VISITORS



The average visitor to the region and state traveled in a party of three people.
Four out of ten parties included 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.

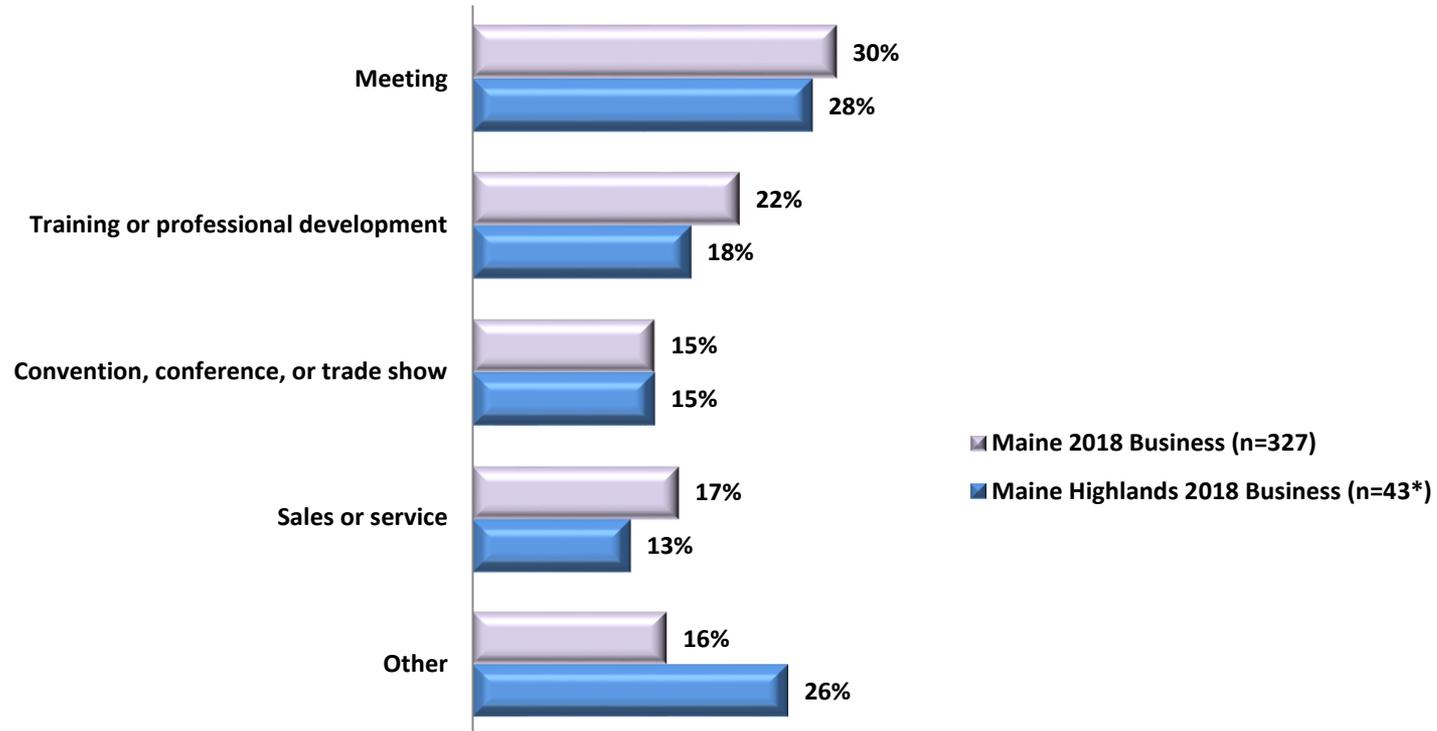
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



Day Visitors: Trip Experience

A variety of business needs brought visitors to the region for the day in 2018.

PRIMARY PURPOSE OF DAY BUSINESS TRIPS



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

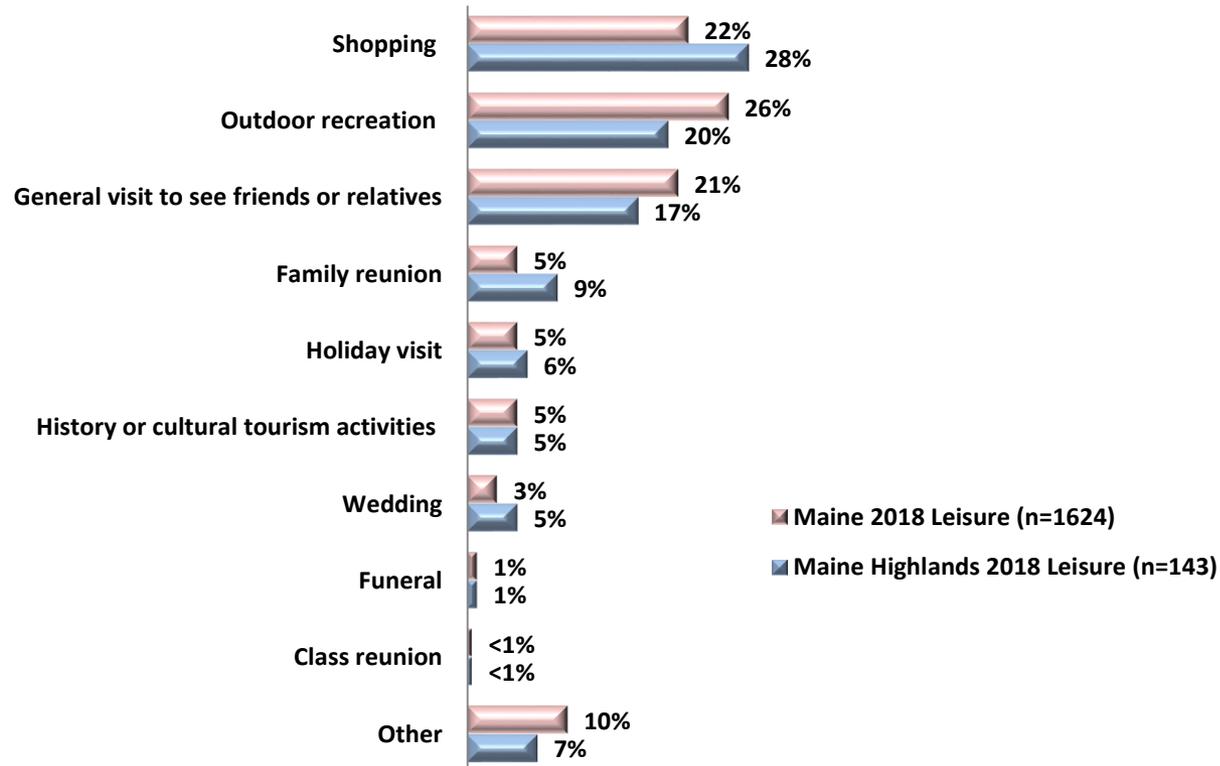
<> indicates a significant difference between this region and the State at the 95% confidence level.

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.*

Shopping, outdoor recreation, and visits to friends or family were the most common leisure purposes of day trips to the Highlands.

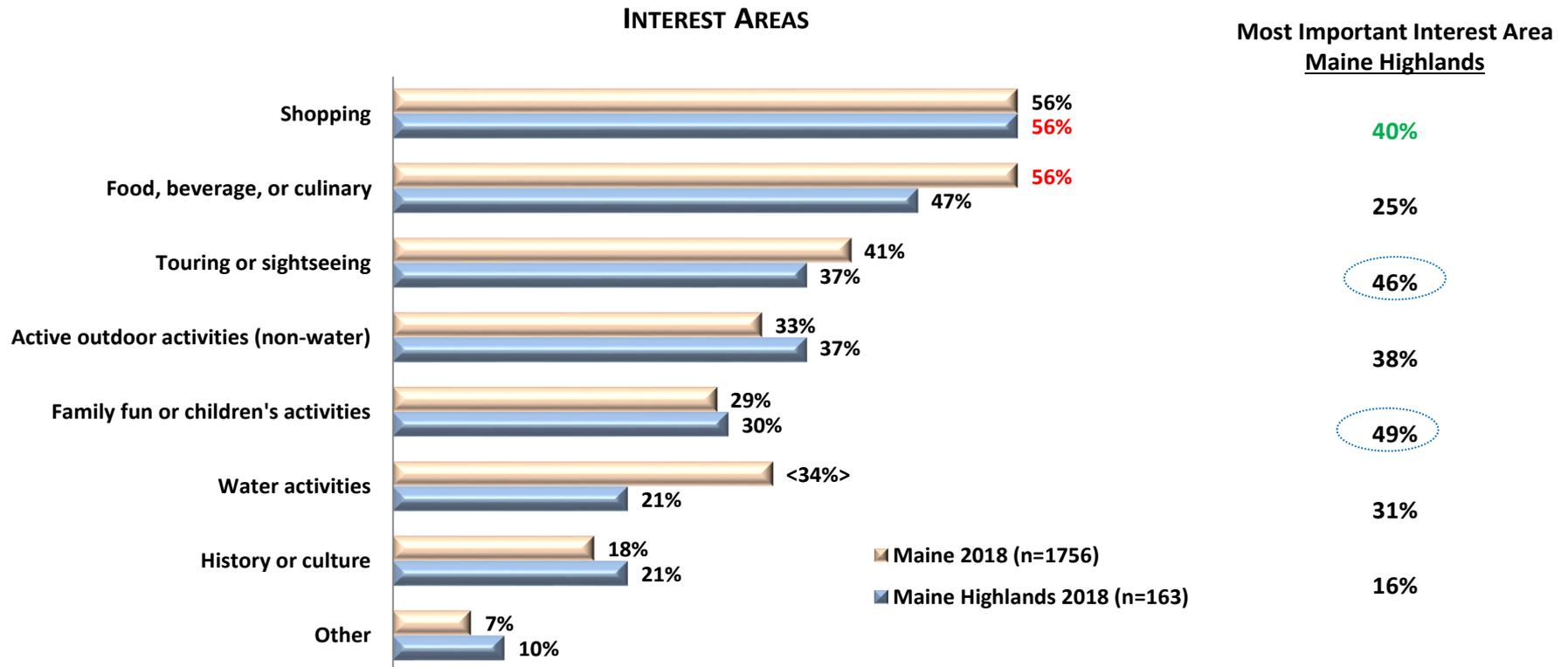
PRIMARY PURPOSE OF DAY LEISURE TRIPS



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.

Shopping was the most common interest of day visitors to the region, followed by culinary experiences, sightseeing, and non-water activities. Family fun and sightseeing were most often considered to be the *most important* interests.

- Day visitors to the Highlands were less likely than visitors across the state of Maine to be interested in water activities.



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

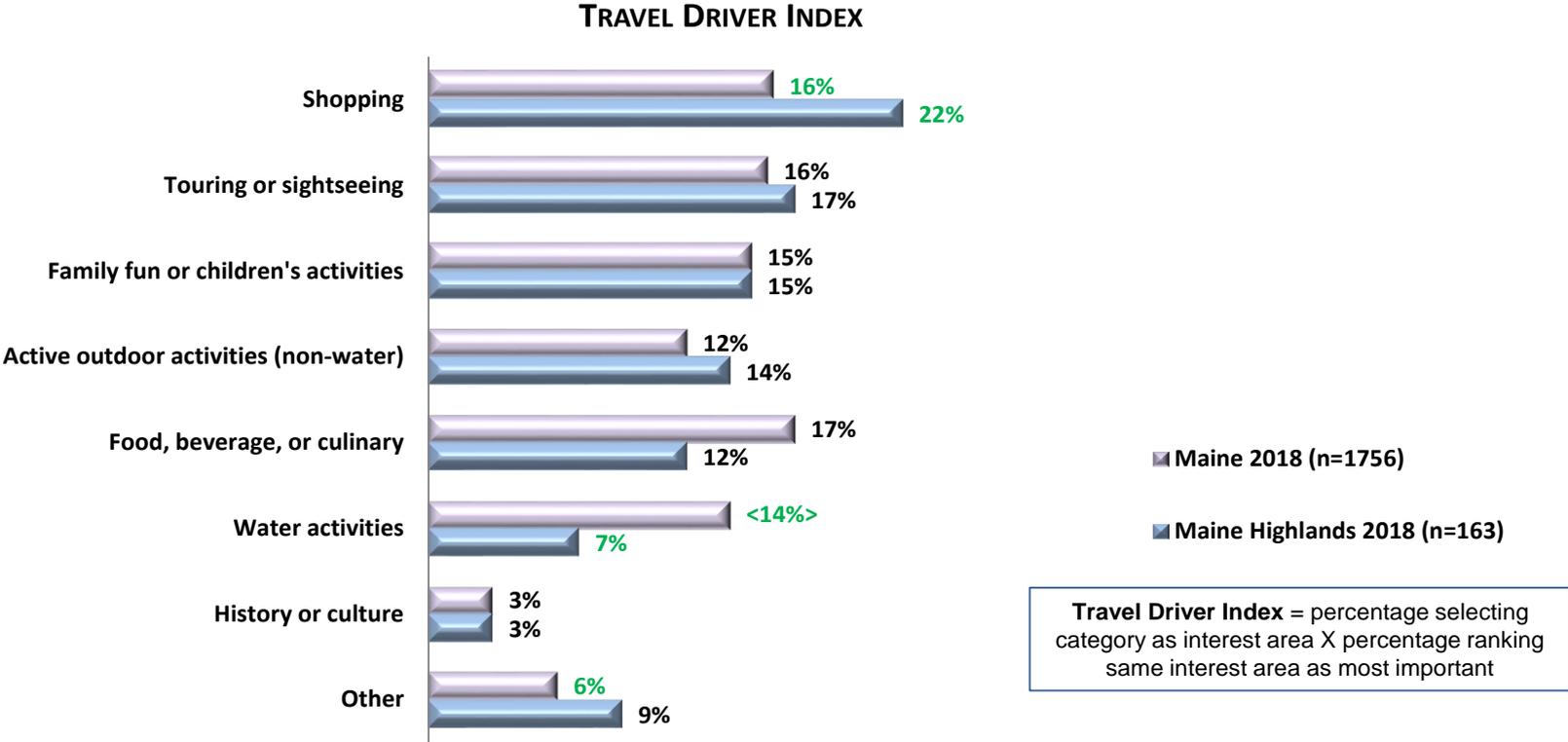
Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<> 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.

When combining interest and importance, shopping was, by a slight margin, the top driver of day visitation to the region. Sightseeing, family fun, land-based outdoor activities, and culinary activities also drove travel to the region.

➤ Water activities were less of a driver of day visitation to the Highlands than to the state as a whole.

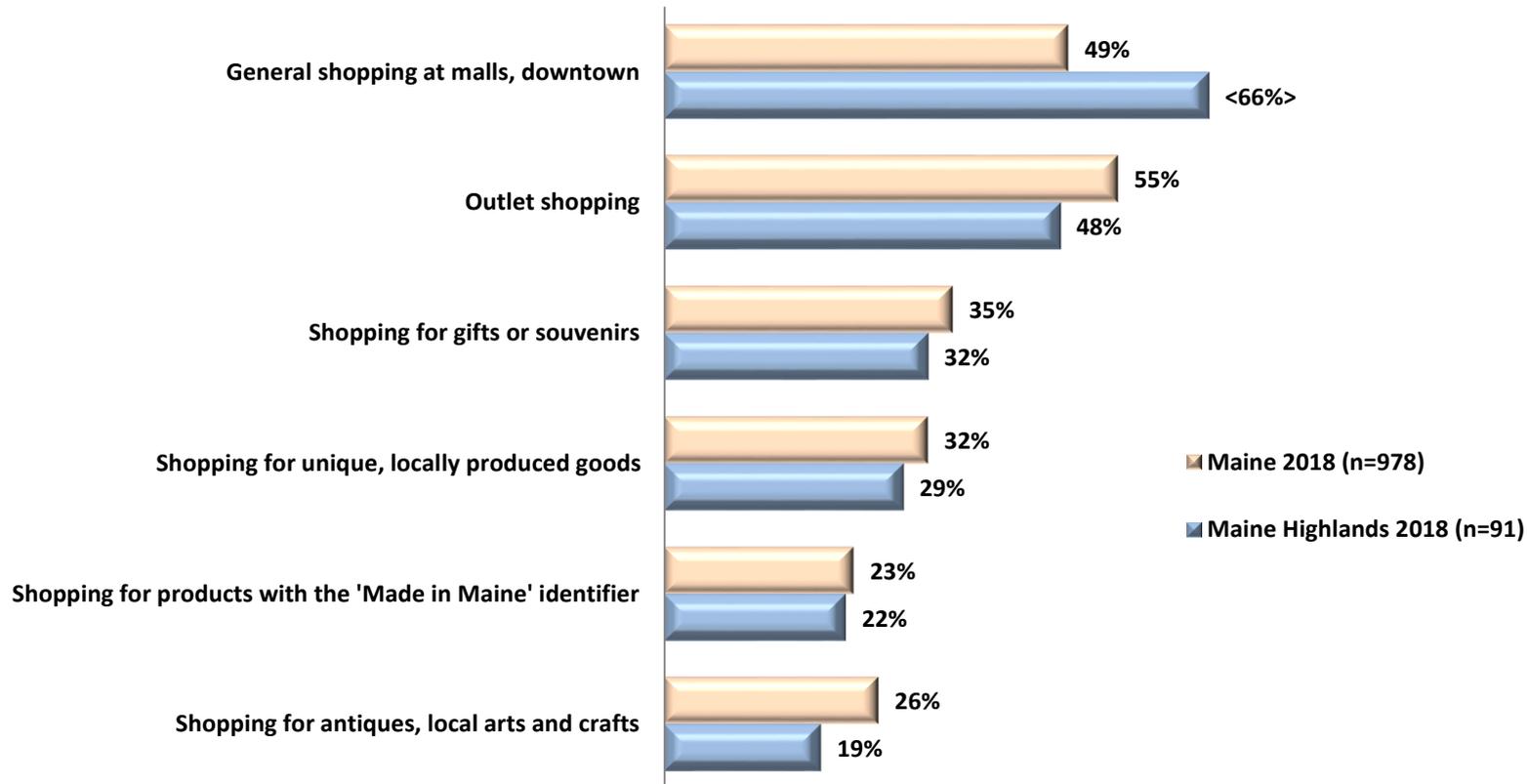


General shopping in malls or downtown areas was the most common shopping activity in the Highlands region, followed by shopping at outlets.

- Shopping in malls or downtown areas was more common on day trips to the region than on day trips to the state as a whole.

SHOPPING ACTIVITIES

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

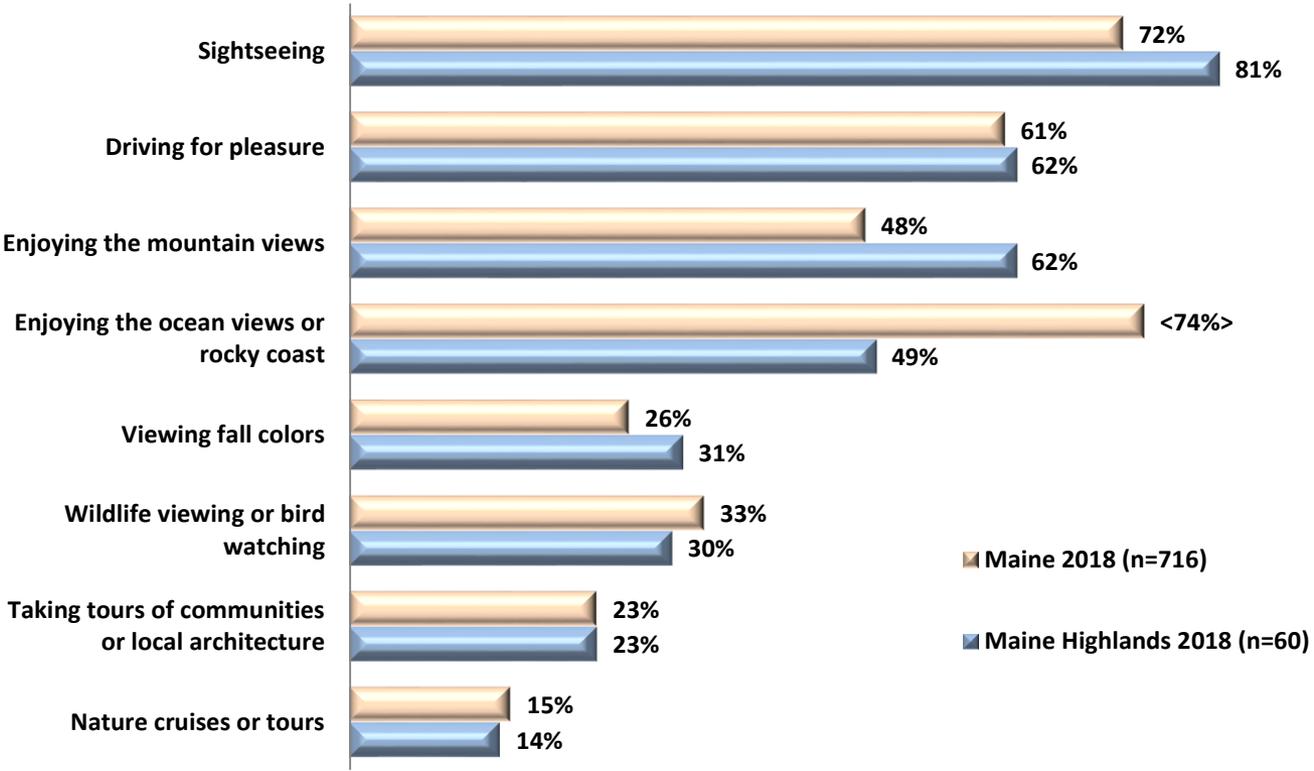


General sightseeing was the most common sightseeing activity for day trips to the region, followed by driving for pleasure, enjoying mountain views, and enjoying ocean views.

- Enjoying coastal views was less common among day travelers to the Highlands than it was among day trippers statewide.

TOURING OR SIGHTSEEING ACTIVITIES

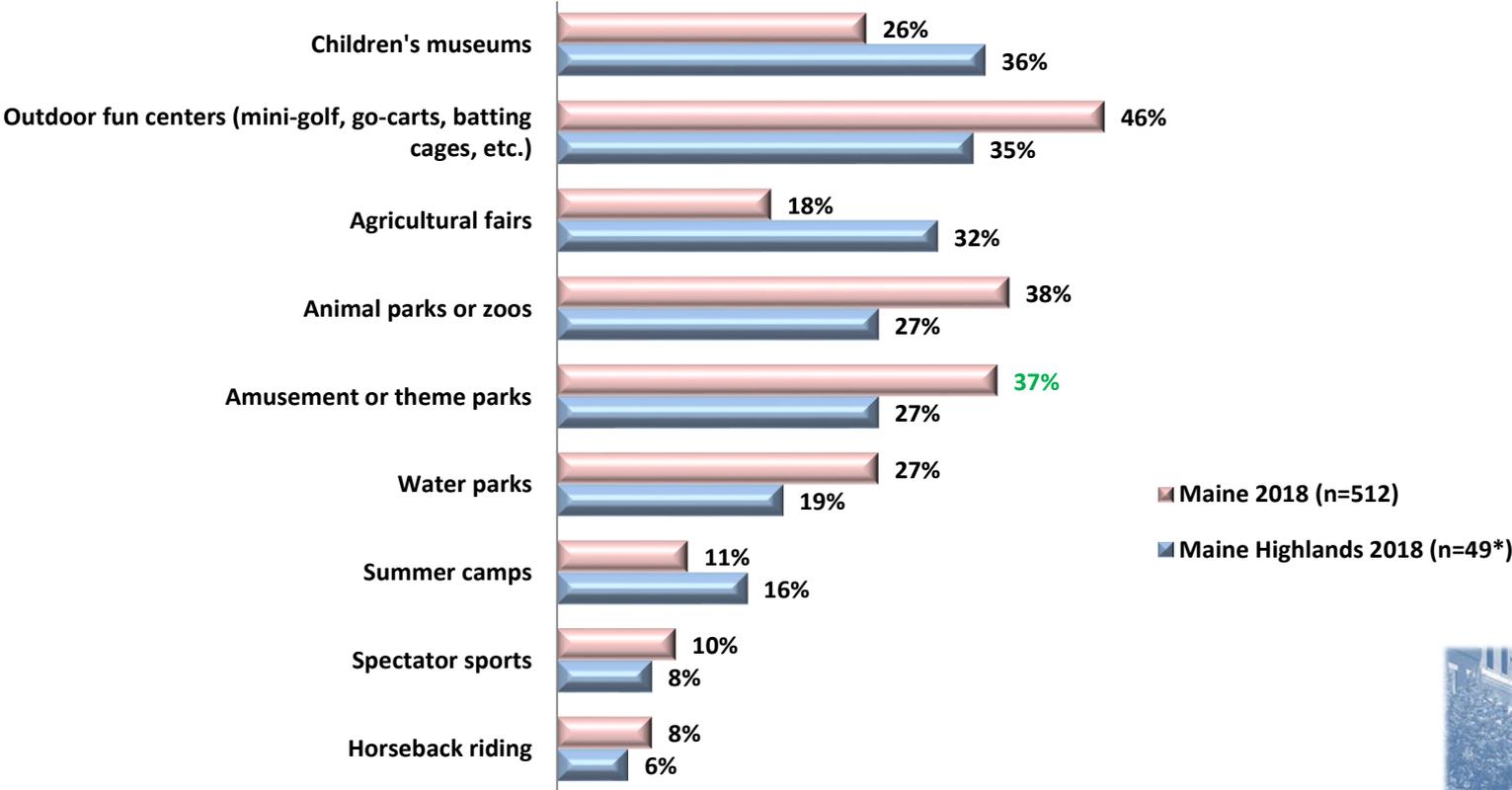
(Base: Those who report touring or sightseeing as an interest area for their Maine trip)



Those seeking family fun for the day engaged in a number of activities in the region.

FAMILY FUN/CHILDREN'S ACTIVITIES

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

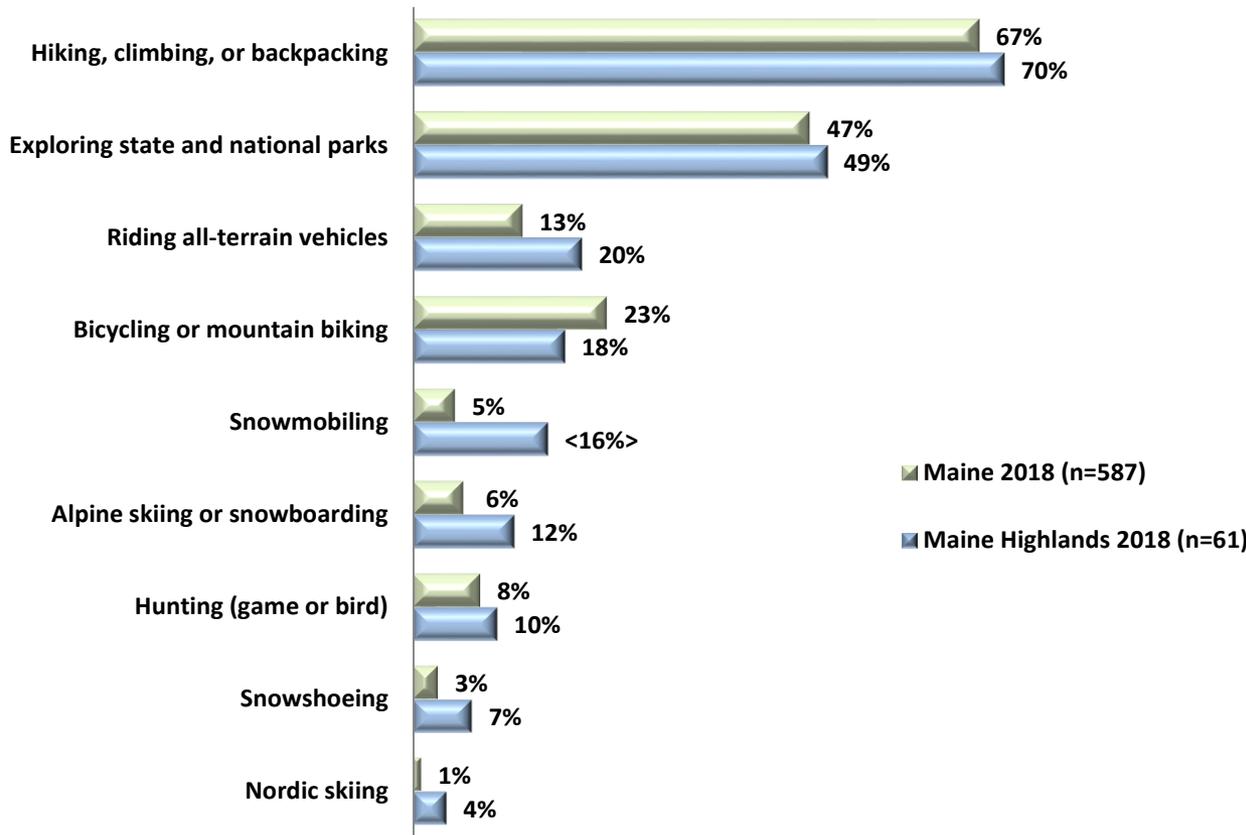


Similar to day visitors statewide, those traveling to the Highlands region for land-based outdoor activities most often went hiking, climbing, or backpacking, though many also explored the region’s public parks.

- Day travelers to the Highlands were more likely than those across state as a whole to report going snowmobiling.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

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

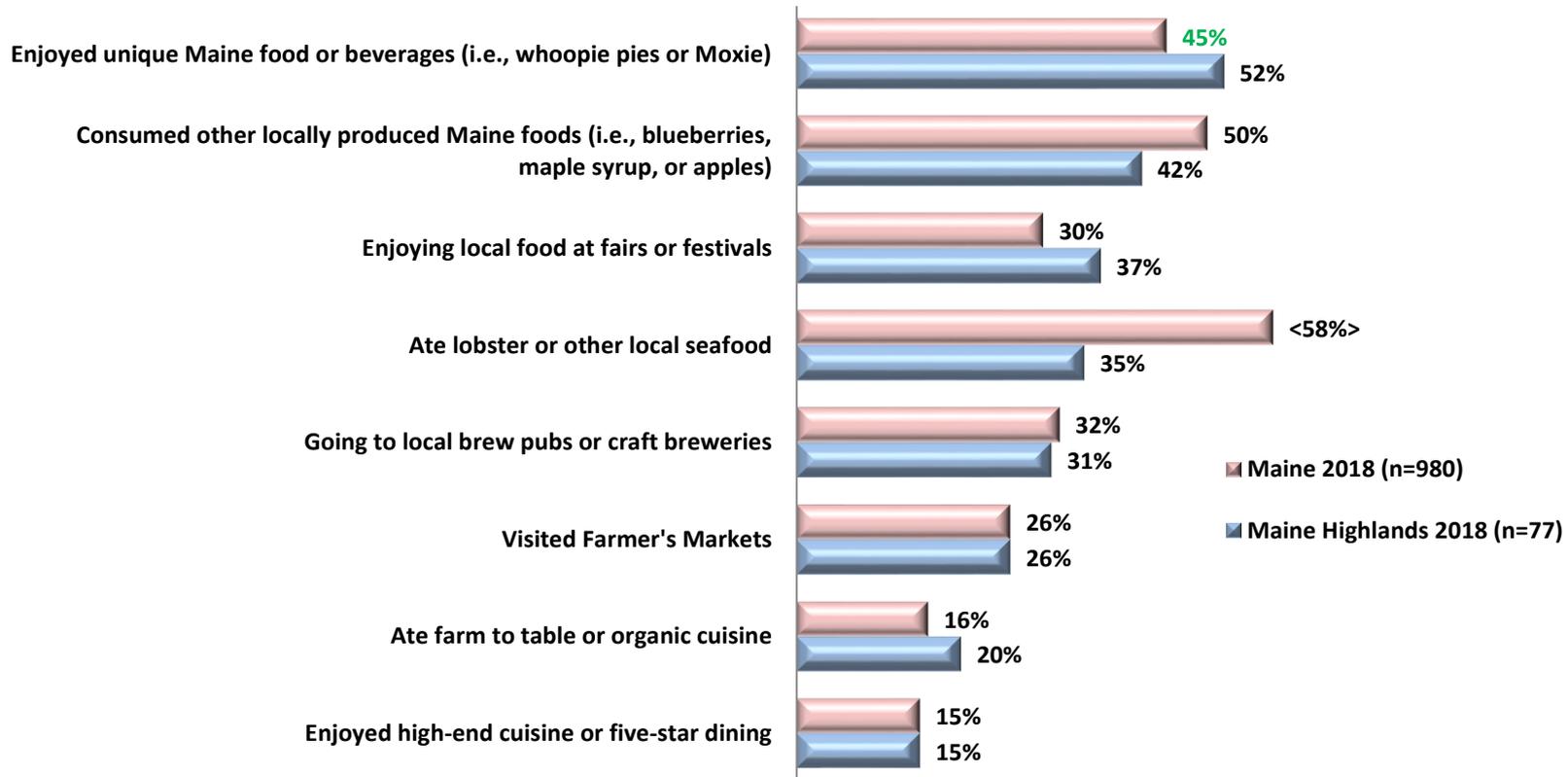


Day visitors to the Highlands in 2018 engaged in a wide variety of culinary activities.

- Eating lobster or other local seafood was less common among day trippers to the Highlands than among such travelers statewide.

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.

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

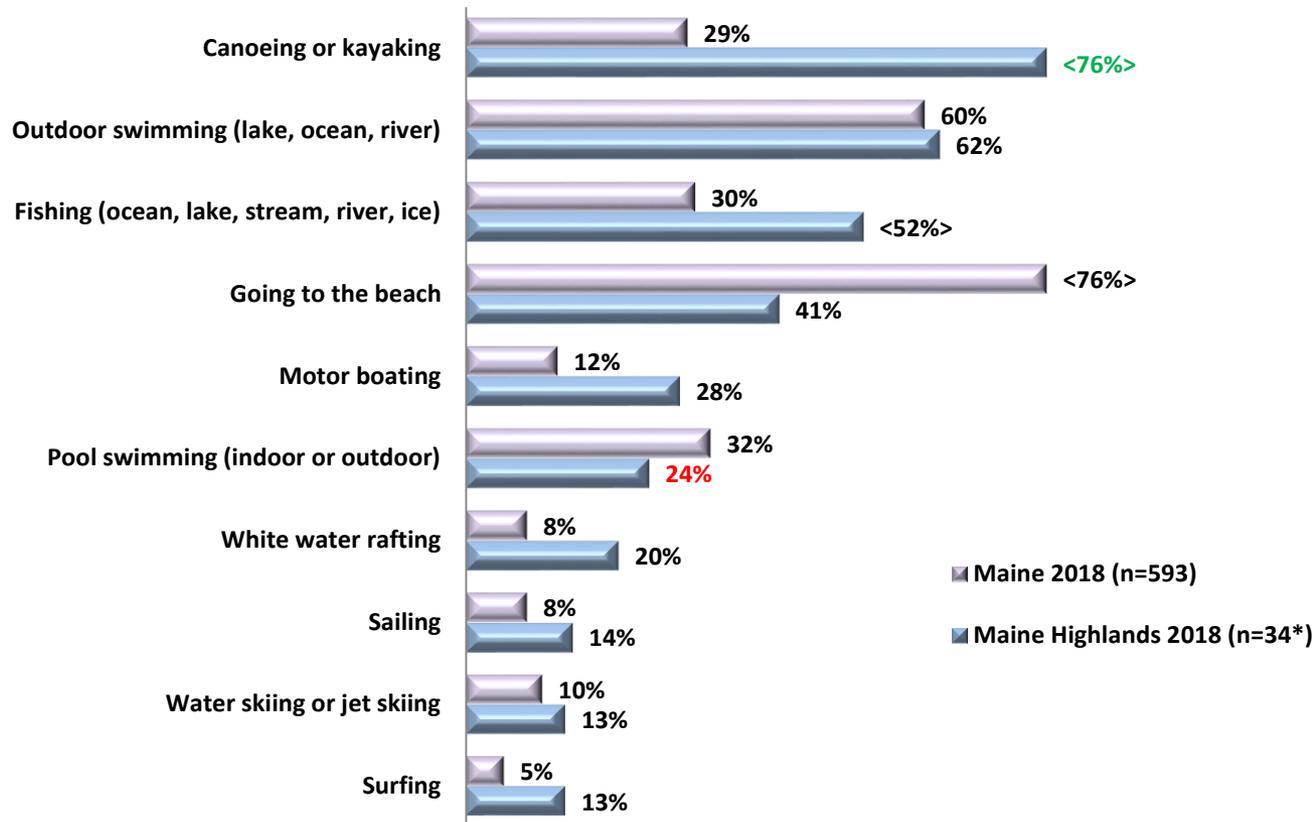
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The most common water-based activities in the region were canoeing or kayaking, outdoor swimming, fishing, and going to the beach.

- Day visitors to the region were more likely than those across the state to go canoeing/kayaking and fishing, but were less likely to go the beach.

WATER ACTIVITIES

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

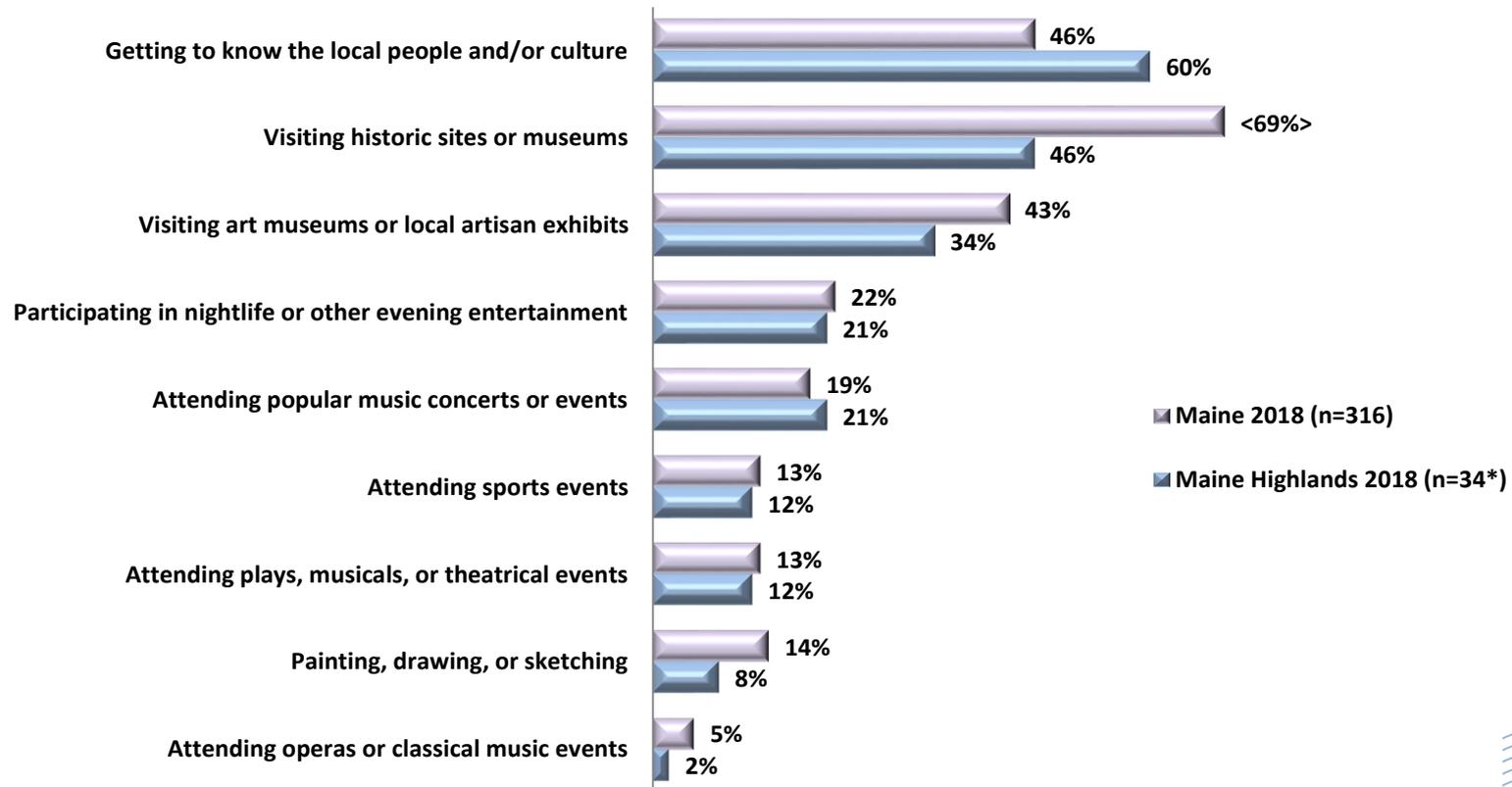


Getting to know the local people and culture, visiting historic sites, and visiting art exhibits were the most popular cultural activities in the region and state.

- Day visitors to the region were less likely than visitors to the state overall to visit historic sites or museums.

HISTORY OR CULTURE ACTIVITIES

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



The Bangor Mall was the most popular attraction on day trips to the Highlands region, followed – distantly – by Baxter State Park and a variety of other destinations.

TOP DESTINATIONS		LESS POPULAR DESTINATIONS*	
48%	Bangor Mall	7%	Cole Land & Transportation Museum
26%	Baxter State Park	7%	Peaks Kenny State Park
21%	Moosehead Lake	7%	Collins Center for the Arts
17%	Dysart’s Restaurant and Truck Stop	7%	Maine Forest and Logging Museum
15%	Bangor Waterfront Concert Series	7%	Katahdin Iron Works
15%	Mt. Katahdin	5%	Penobscot Theatre
14%	Maine Discovery Museum		
14%	Hollywood Casino		
10%	Maine Beer Trail		

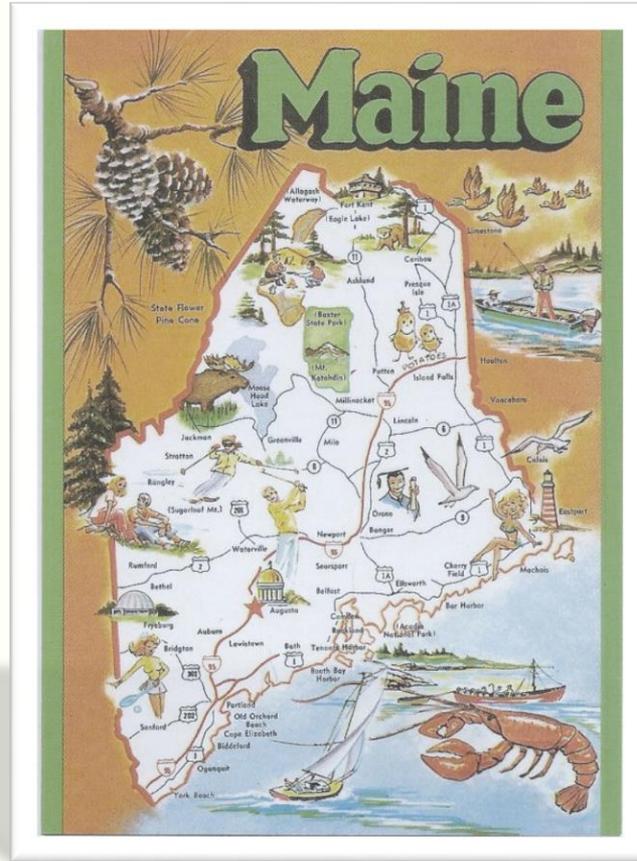
* Does not include options selected by fewer than 5% of surveyed visitors.

(n=163)

Q24: 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.

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



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