



Maine Office of Tourism

Visitor Tracking Research

2018 Calendar Year

Maine Woods Area Special Report



July 2019

A Division of DRI



Maine Woods Area Special Report

TABLE OF CONTENTS

Introduction	3
Visitors to the Maine Woods: How They Are Unique	4
Visitation and Economic Impact Summary	8
Overnight Visitors	10
Traveler Profile	11
Trip Experience	16
Day Visitors	30
Traveler Profile	31
Trip Experience	36
Research Objectives and Methodology	49

Introduction

This report summarizes visitors to the Maine Woods area and their trips in 2018. The Maine Woods area is made up of five of Maine's tourism regions:

- ❖ Maine Lakes & Mountains,
- ❖ Kennebec Valley,
- ❖ The Maine Highlands,
- ❖ Aroostook County, and
- ❖ Washington County (a portion of the Downeast & Acadia region).

In total, **1,346 overnight visitors** and **610 day visitors** to the Maine Woods Area were surveyed.

Throughout this report, data for the Maine Woods area will be presented alongside data for the state of Maine as a whole. Statistically significant differences between the Maine Woods area and the state were calculated at the 95% confidence level and are noted throughout by < >.

(A statistically significant difference means the observed difference is larger 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 Woods area and the state of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.

Visitors to the Maine Woods: How They Are Unique



Comparisons: Area vs. State

- Visitors to the Maine Woods area and visitors to the state of Maine as a whole in 2018 differed in a number of ways. These differences can be seen in their:
 - ✓ Demographics,
 - ✓ Origin,
 - ✓ Reasons for traveling, and
 - ✓ Activities while visiting.
- Broadly, trip activities and stated travel interest areas closely followed the outdoor and nature-oriented environment available in the Maine Woods area.
- The highlights of these differences are shown on the following pages.

Visitor Origin and Demographics

Visitors to the Maine Woods area, compared to visitors statewide, were...

Overnight Visitors

- **More likely to be from the Mid-Atlantic region, and less likely to be from New England.**
- **More likely to be visiting the state for the first time.**

Day Visitors

- **Less affluent on average.**
- **More likely to be from Maine or Canada, and less likely to be from Massachusetts or New Hampshire.**

Visitor Interests and Activities

Visitors to the Maine Woods area, compared to visitors statewide, were...

Overnight Visitors

- **More likely to be interested in active outdoor activities, culture, and family-oriented activities, but less likely to be interested in culinary activities and shopping.**
- **Less likely to go to the beach, but more likely to do many other water-based activities, including:**
 - Canoeing/kayaking,
 - Fishing,
 - Motor boating,
 - Water skiing/jet skiing,
 - White water rafting, and
 - Sailing.

Day Visitors

- **More likely to be interested in active outdoor activities and water activities, but less likely to be interested in culinary activities and culture.**
- **Less likely to go to the beach, but more likely to do other water-based activities, including:**
 - Outdoor swimming,
 - Canoeing/kayaking,
 - Fishing,
 - Motor boating, and
 - White water rafting.
- **More likely to go shopping (the Bangor Mall is the most common regional attraction).**

Visitation and Economic Impact Summary



Visitation and Economic Impact Summary

2018 Regional Tourism Impact Estimates

Maine Woods Area

- The Maine Woods area includes:
- Maine Lakes & Mountains,
 - Kennebec Valley,
 - The Maine Highlands,
 - Aroostook County, and
 - A portion of Washington County.

An estimated **17.5 million travelers** visited the Maine Woods area in 2018 ~ a **12% increase** from 2017.

2017 Total
15.6 million
(36% of all Maine visitors)

2018 Total
17.5 million
(39% of all Maine visitors)

Number of Visitors to the Maine Woods Area

* Percent of estimated total
Maine day visitors

7.5 million
(32.5%)*

8.4 million
(34.0%)*

** Percent of estimated total
Maine overnight visitors

8.1 million
(40.2%)**

9.0 million
(44.0%)**

2017

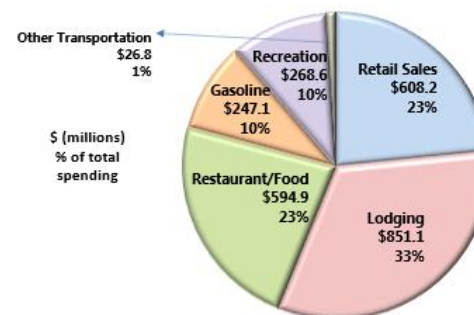
2018

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

Maine Woods Area

In 2018, Maine Woods visitors spent **\$2.6 billion** ~ up 12% from 2017.



The \$2.6 billion spent by visitors to the Maine Woods area 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, 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.

45,780 jobs

\$880 million
in total
earnings

\$245 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





Overnight Visitors: Traveler Profile

The typical surveyed overnight visitor to the Maine Woods area was 37 years old and had an annual household income of \$86,000 in 2018. Two out of three had a college degree or were employed full-time.

- ❖ Visitors to the area were demographically very similar to visitors to the state as a whole in 2018.

	Maine 2018 (n=2901)	Maine Woods 2018 (n=1346)
Age:		
< 35	46%	<50%>
35 - 44	23%	24%
45 - 54	14%	13%
55 +	<17%>	13%
Mean	<39.0>	37.4
Income:		
< \$50,000	27%	26%
\$50,000 - \$99,999	43%	45%
\$100,000 +	30%	29%
Mean	\$86,350	\$85,970
Female	<66%>	63%
College degree or higher	65%	64%
Married	47%	46%
Employed full-time	62%	<65%>

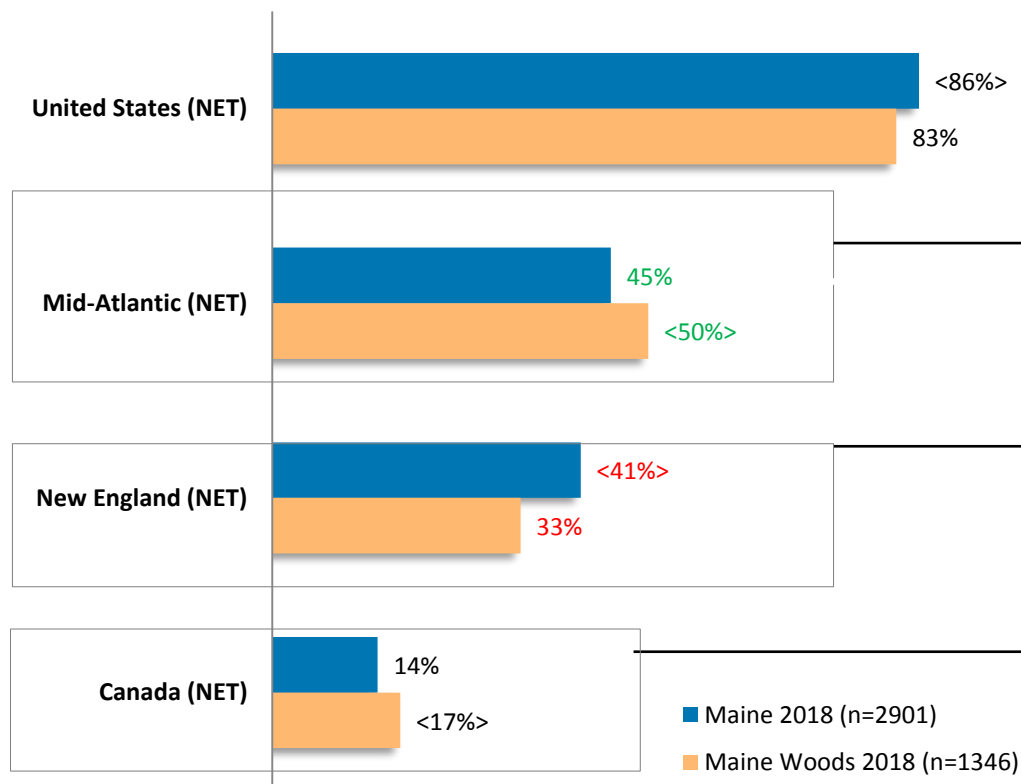
<> indicates a significant difference between subgroups at the 95% confidence level.

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

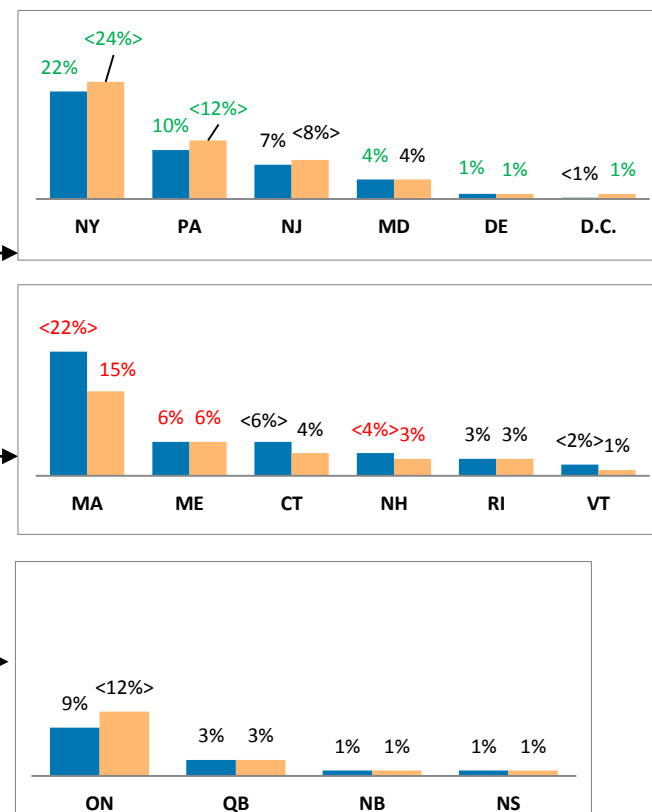
Half of overnight visitors to the Maine Woods area in 2018 were from the Mid-Atlantic region, and one-third were from New England.

- ❖ Compared to the state as a whole, the area received a larger share of its overnight visitors from the Mid-Atlantic region, but a smaller share from New England.
- ❖ Between 2017 and 2018, the Maine Woods welcomed more visitors from the Mid-Atlantic (growing from 30% to 50%) and fewer from New England (falling from 54% to 33%).

LOCATION OF RESIDENCE*



STATE/PROVINCE OF RESIDENCE (% of travelers coming from state/province)



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

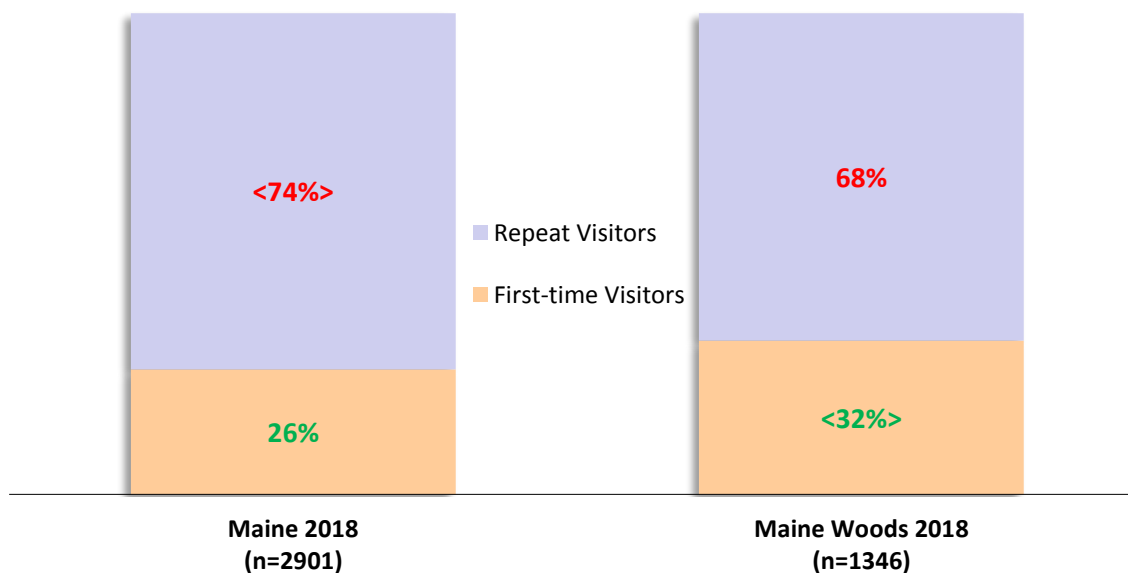
<> indicates a significant difference between subgroups at the 95% confidence level.

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

One out of three overnight visitors to the Maine Woods area in 2018 were visiting the state for the first time.

- ❖ First-time visitors were more common in the Maine Woods area than across the state.
- ❖ First-time visitors were more common for the area and the state as a whole in 2018 than in 2017.

REPEAT VS. FIRST-TIME VISITORS

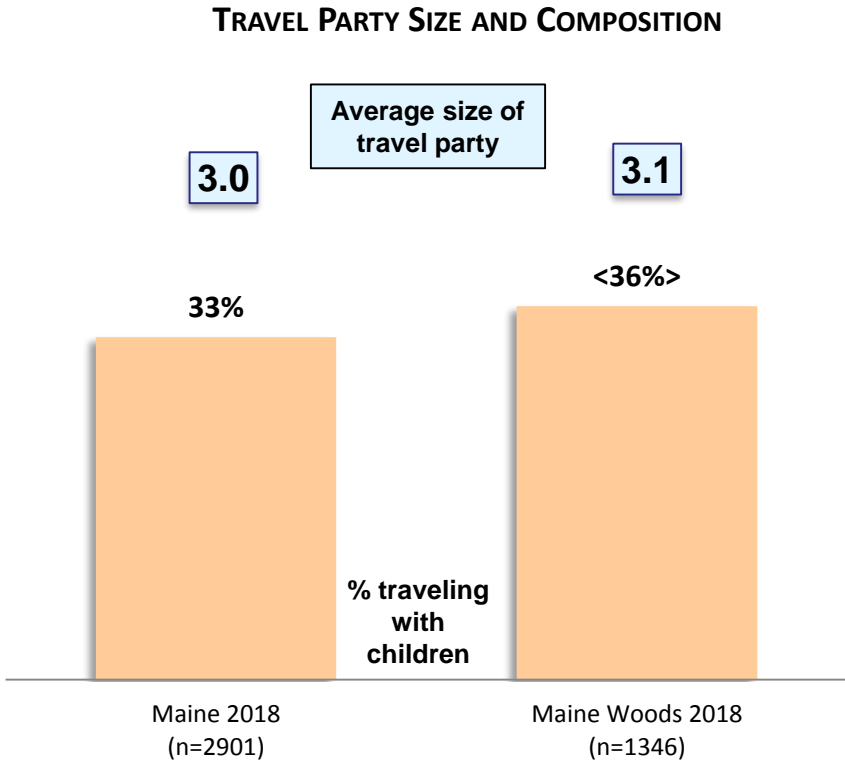


Q11. Was this your first visit in Maine?

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

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

On average, overnight travel parties to the Maine Woods area in 2018 had three people.
About one out of three travel parties included children.

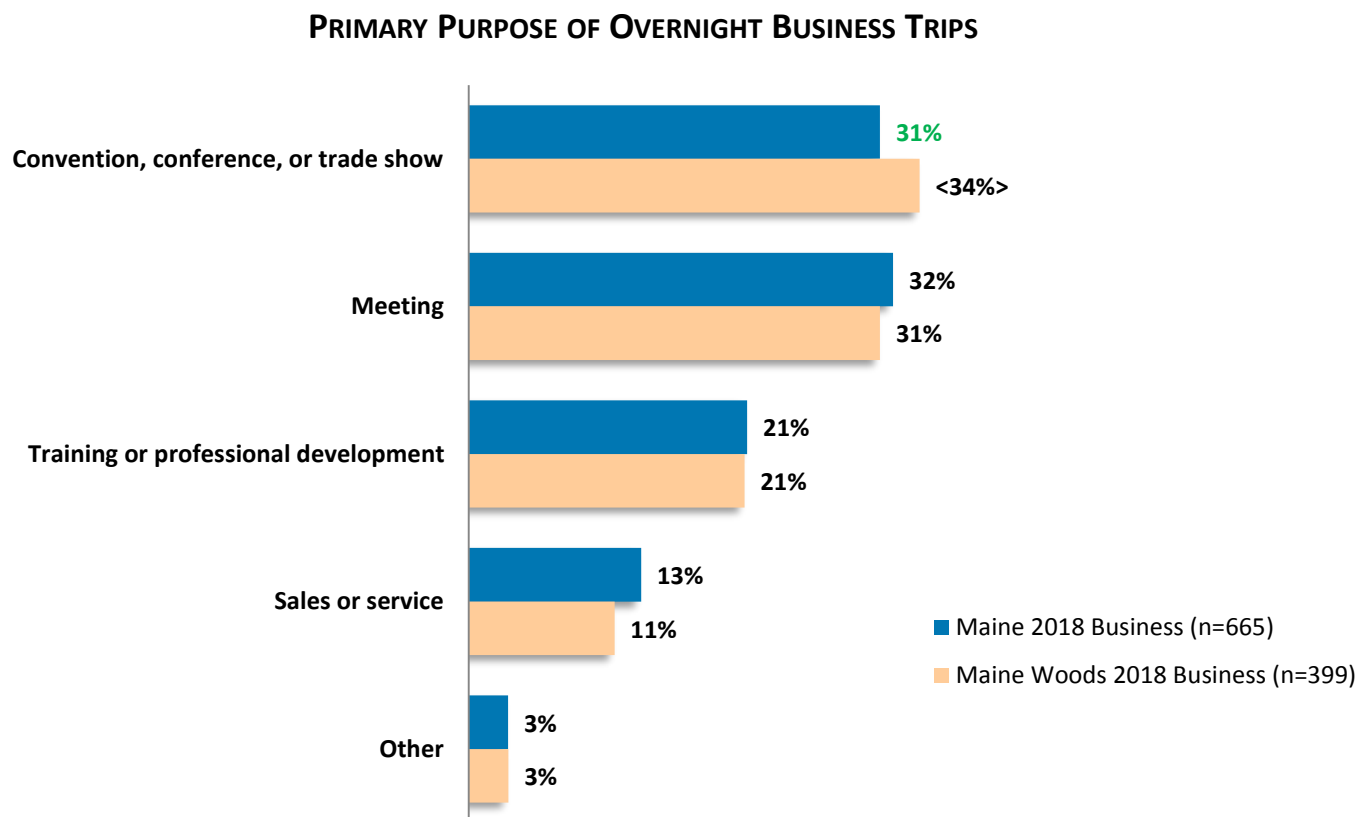


Q24. Including yourself, how many people (adults and children) were in your immediate travel party on this specific trip in Maine?
Q25. How many of these people were: Children?
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease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



Overnight Visitors: Trip Experience

Overnight business trips to the area and the state most often revolved around conferences or meetings, though many involved training.



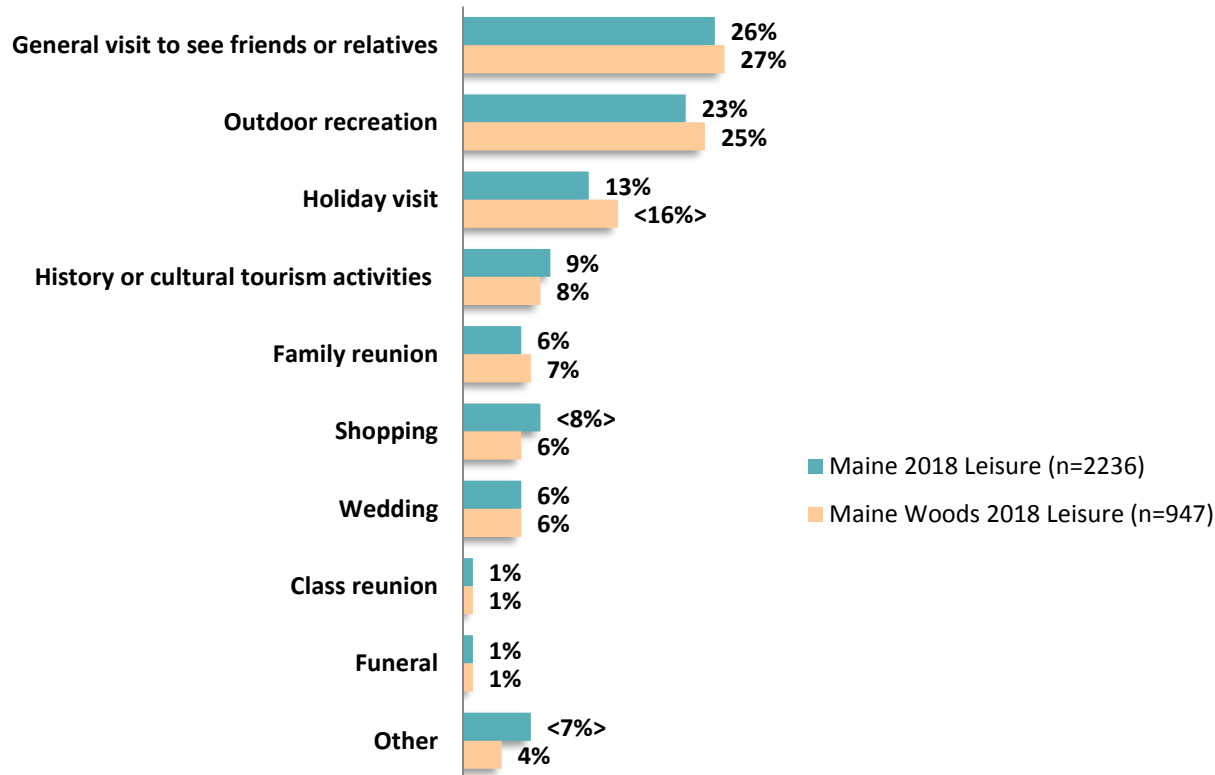
Q8. What was the primary purpose of your most recent business trip in Maine?

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

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

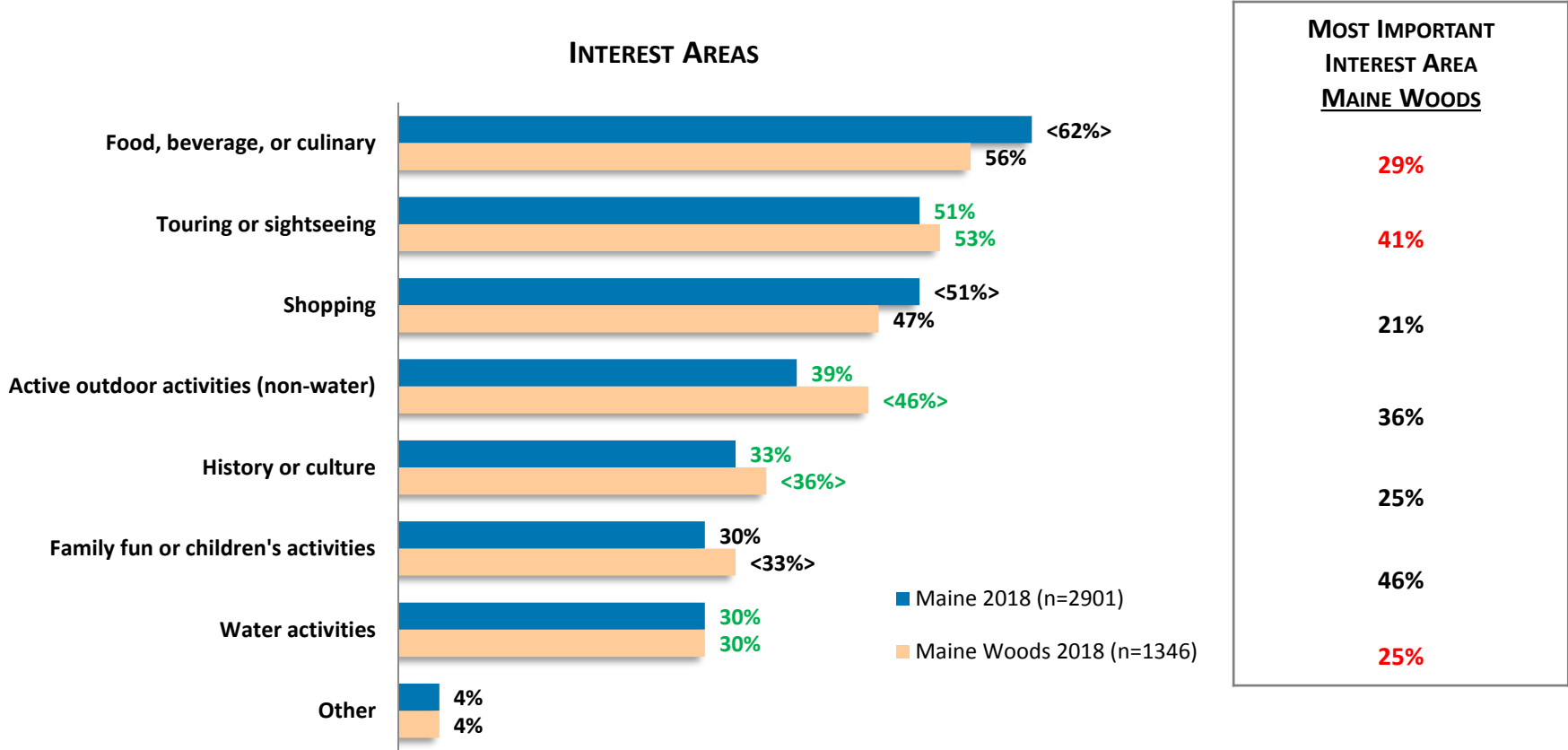
Visits to see friends or family and outdoor recreation were the most common purposes of overnight leisure trips to the Maine Woods area in 2018, followed by holiday visits.

PRIMARY PURPOSE OF OVERNIGHT LEISURE TRIPS



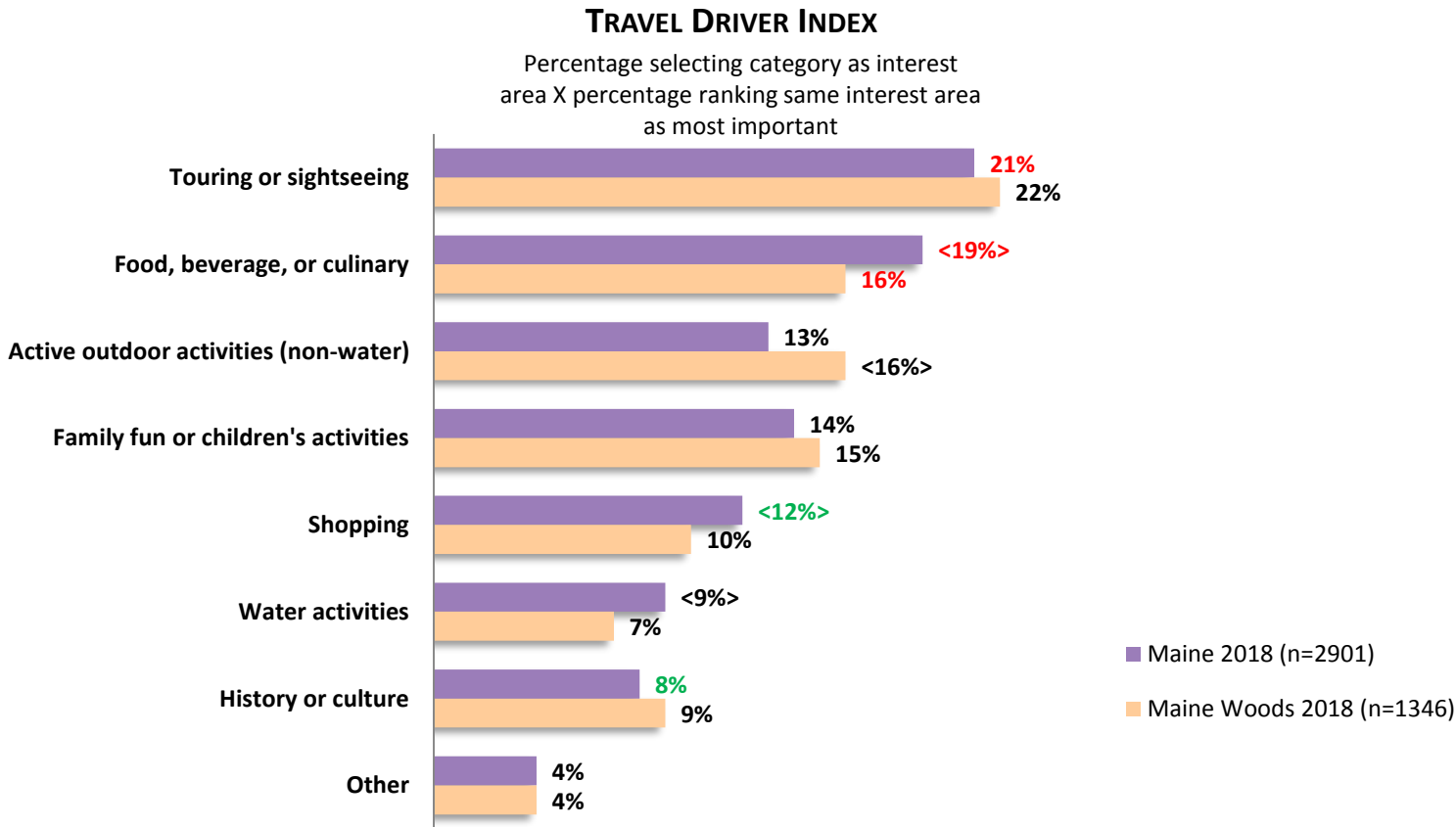
Culinary activities, sightseeing, shopping, and active outdoor activities were the *most popular* interests among overnight visitors to the Maine Woods. Family fun, sightseeing, and outdoor activities were particularly likely to be the *most important* interests.

- ❖ Visitors to the Maine Woods were less likely than visitors to the state overall to be interested in culinary activities and shopping, but were more likely to be interested in active outdoor activities, history or culture, and family fun 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 subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

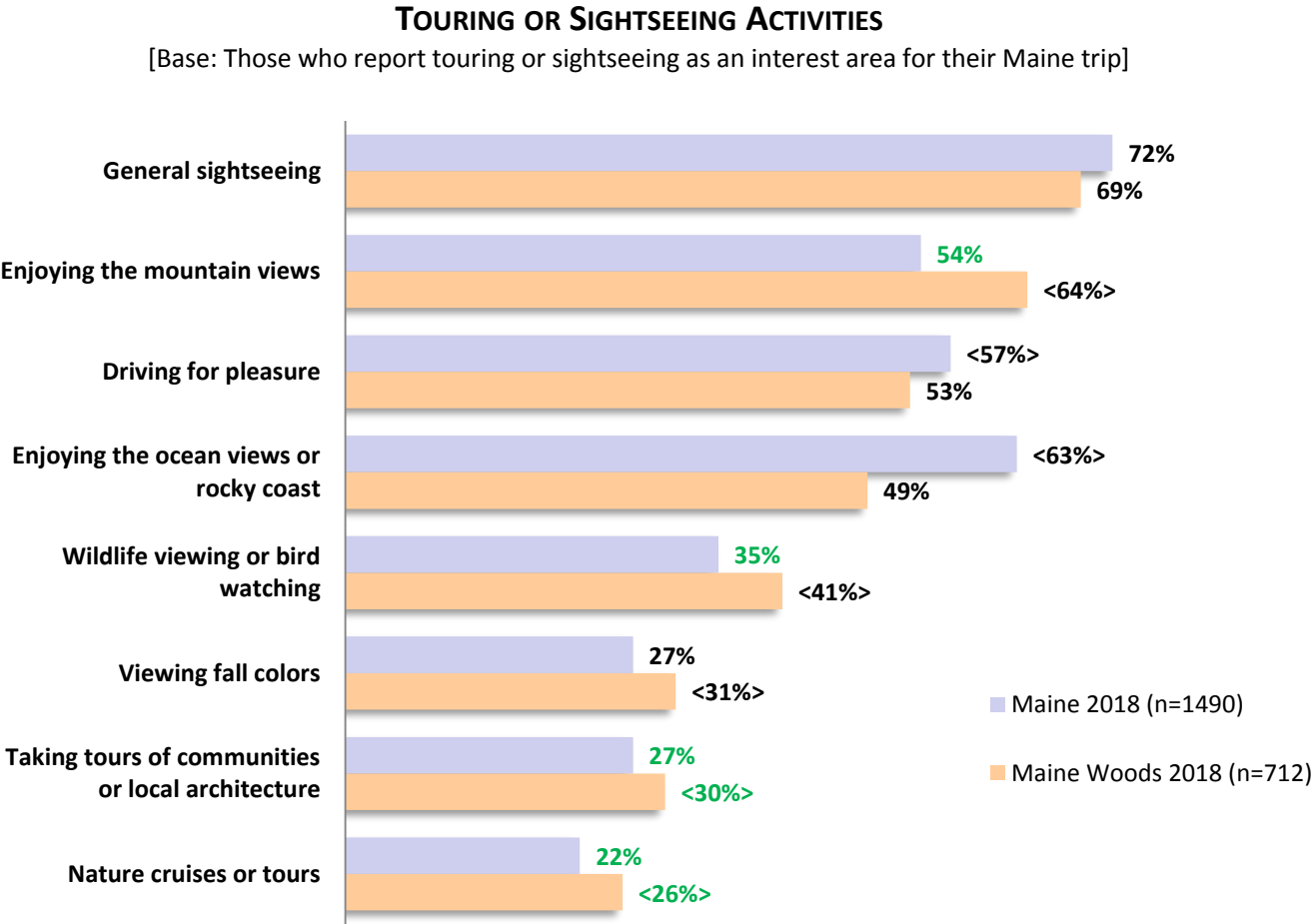
Overall, sightseeing was the strongest driver of overnight travel to the Maine Woods area in 2018, followed by culinary interests, active outdoor activities, and family fun activities.



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 subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General sightseeing and enjoying mountain views were the most popular touring activities for overnight visitors to the Maine Woods, followed by driving for pleasure and enjoying coastal views.

- ❖ Overnight visitors to the area were more likely than visitors to the state overall to enjoy the mountain views, view wildlife, and view fall colors, but were less likely to drive for pleasure and enjoy coastal views.

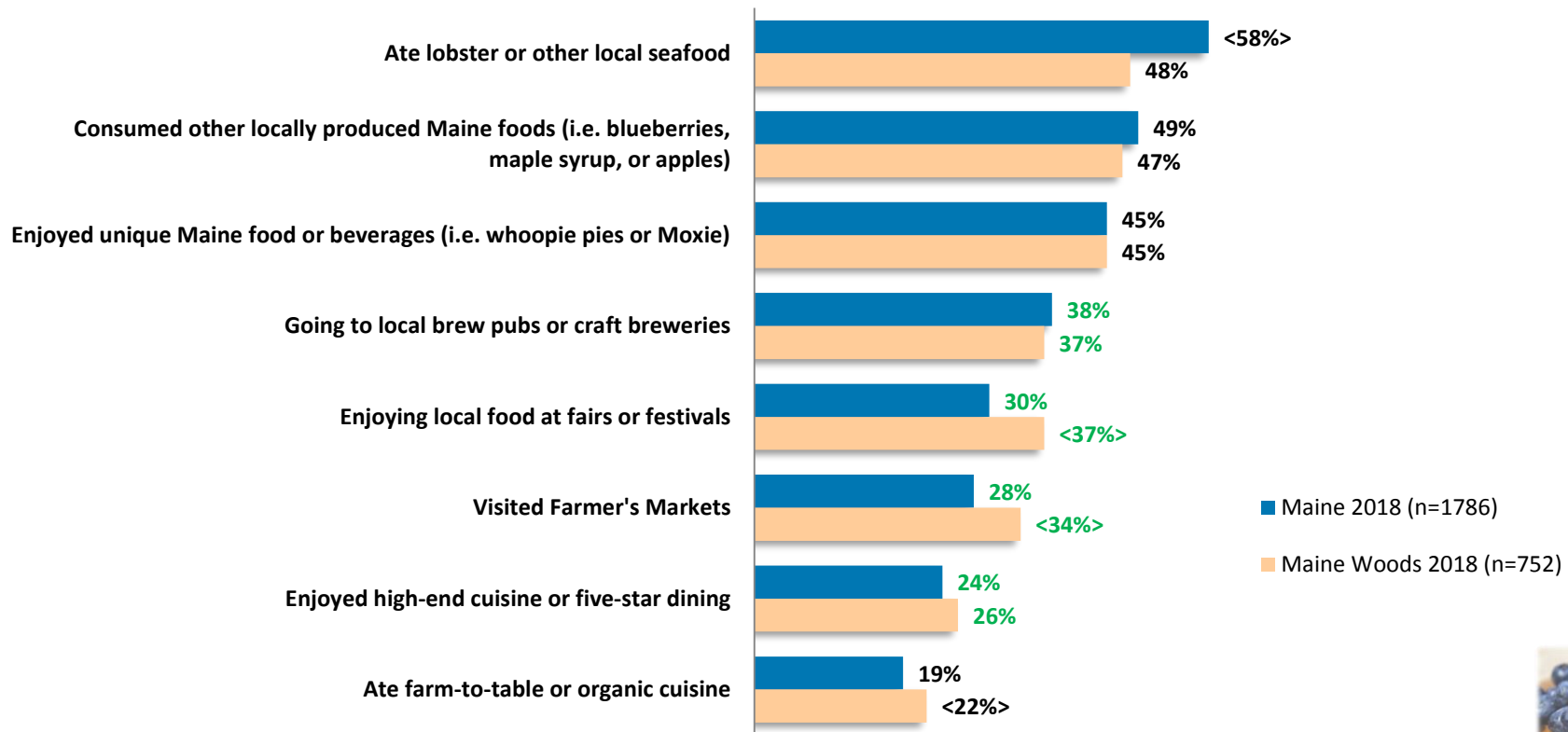


The most popular culinary activities for overnight visitors to the Maine Woods were eating seafood and other foods that were local or unique.

- ❖ Overnight visitors to the Maine Woods were more likely than those to the state overall to have food at local events and to go to farmer's markets, but were less likely to enjoy seafood.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

[Base: Those who report food, beverage, or culinary 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 subgroups at the 95% confidence level.

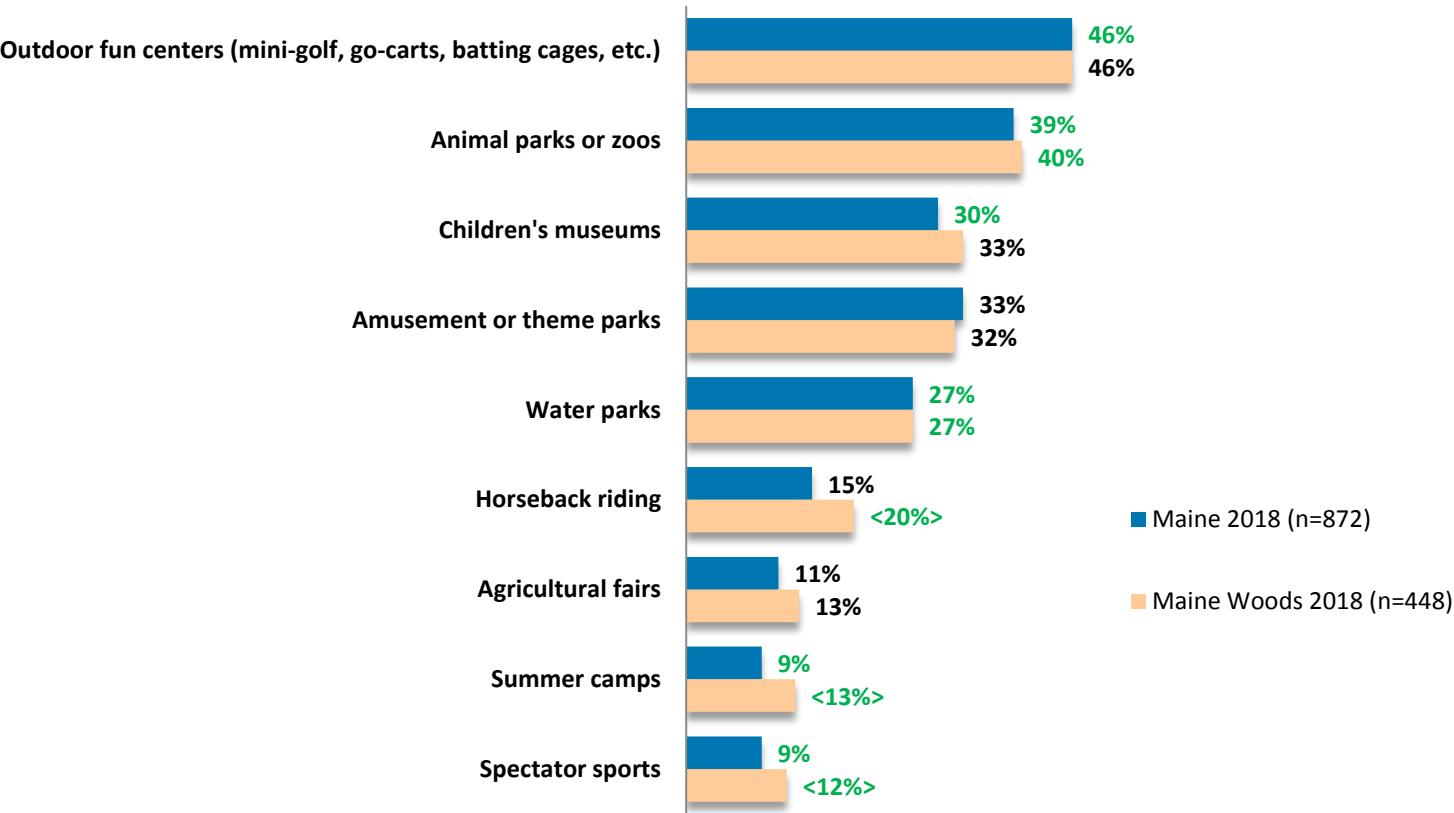
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outdoor fun centers were the most popular family fun activity for visitors to the Maine Woods area, followed by animal parks or zoos, children’s museums, amusement parks, and water parks.

❖ Several family fun activities became more popular in both the area and the state between 2017 and 2018.

FAMILY FUN/CHILDREN’S ACTIVITIES

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

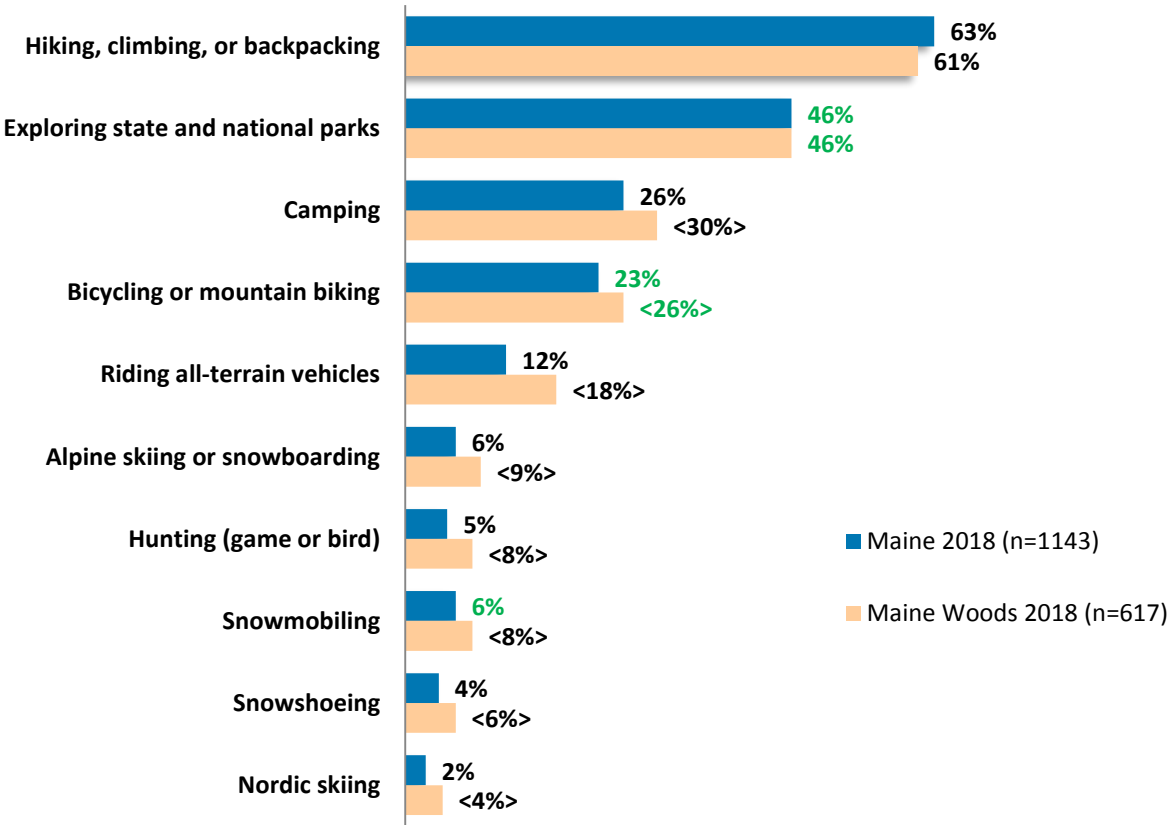


Hiking and related pursuits were the most common outdoor activities for overnight visitors to the Maine Woods, followed by exploring state or national parks, camping, and cycling.

- ❖ A variety of active outdoor activities were more popular on trips to the Maine Woods than on trips to the state overall.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

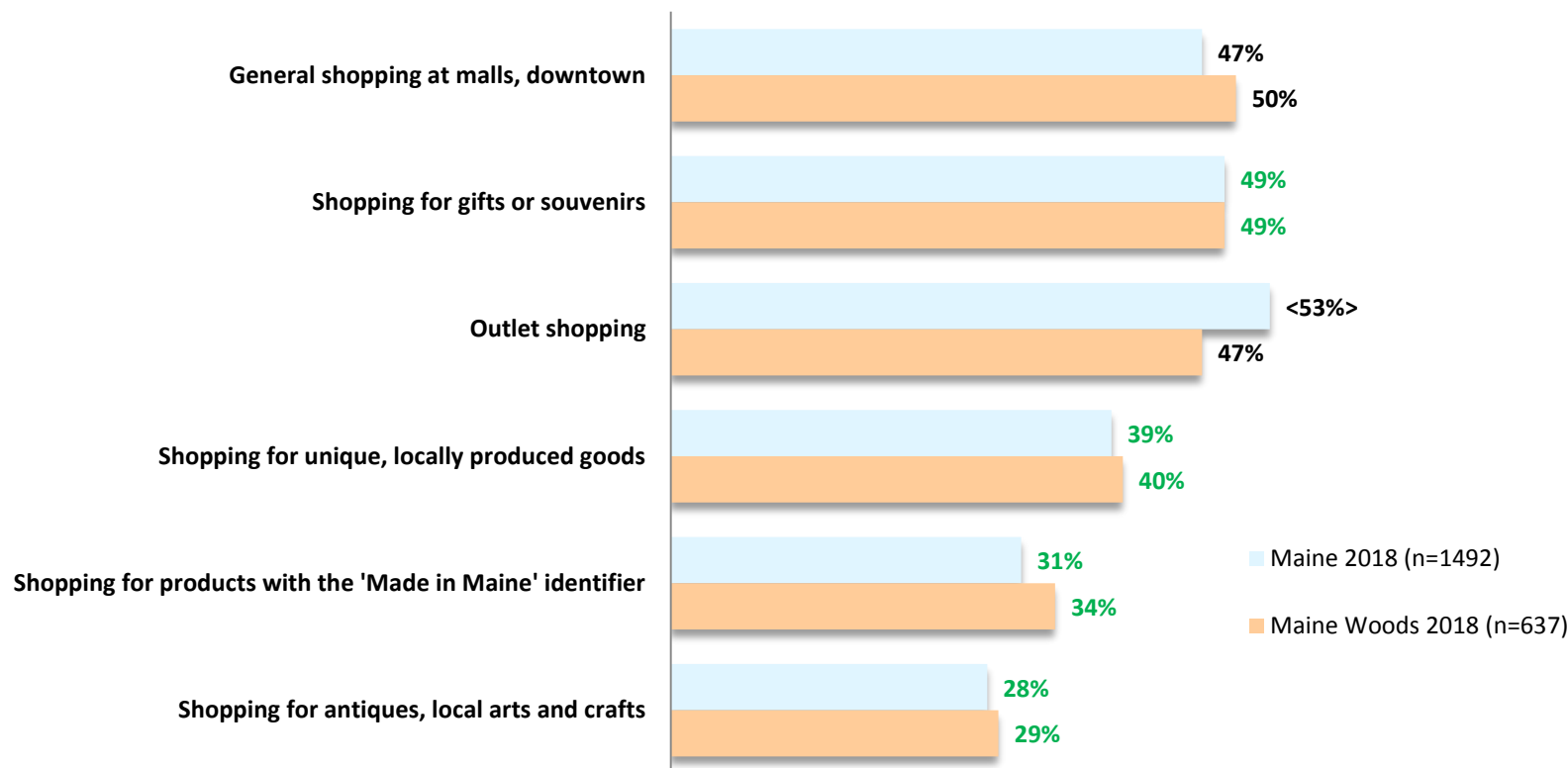
[Base: Those who report outdoor activities as an interest area for their Maine trip]



A variety of shopping activities were about equally popular on overnight trips to the Maine Woods area in 2018.

SHOPPING ACTIVITIES

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



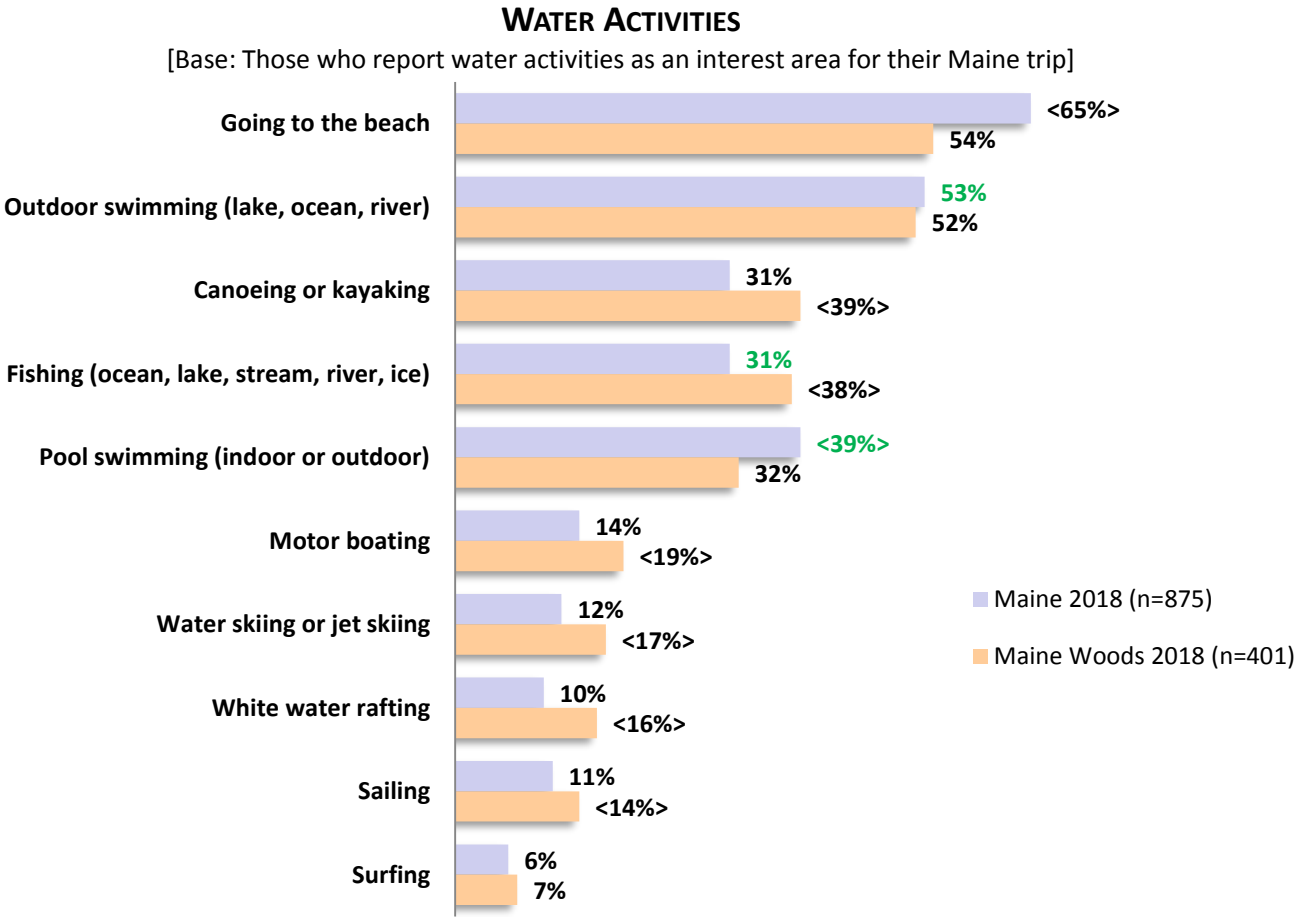
Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

Going to the beach and outdoor swimming were the most popular water activities on overnight trips to the Maine Woods, followed by canoeing or kayaking, fishing, and pool swimming.

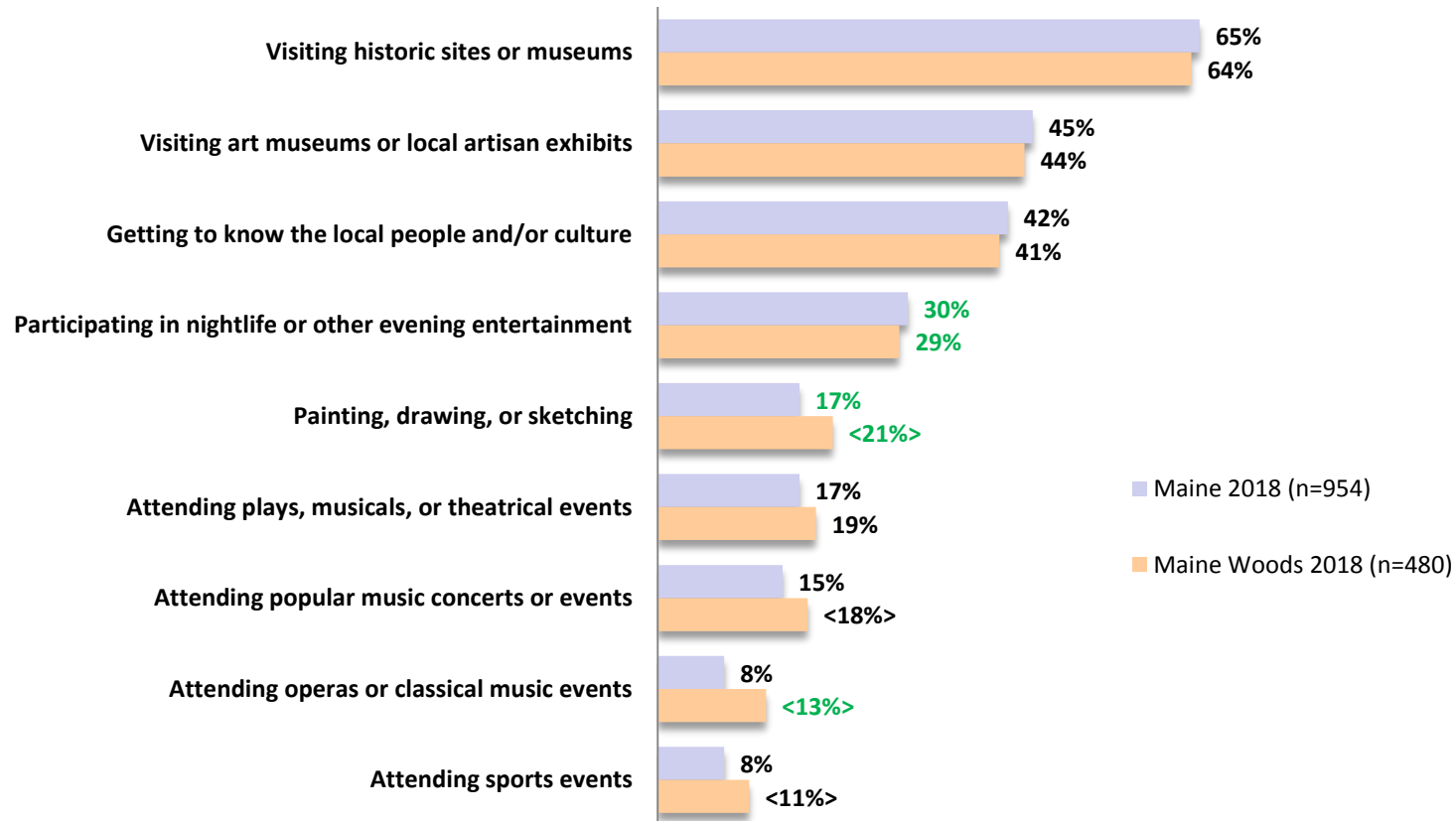
- ❖ Going to the beach and pool swimming were less common on overnight trips to the area compared to overnight trips statewide. Most other water activities were more common on overnight trips to the area than trips to the state.



Visiting historic sites or museums was the most common cultural activity on overnight trips to the Maine Woods, though many trips included visits to art exhibits and getting to know the local culture.

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 subgroups at the 95% confidence level.

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

The most popular attractions for overnight visitors to the Maine Woods area include the Bangor Mall, the Maine Beer Trail, and Baxter State Park.

Top Three Destinations

17% - Bangor Mall

16% - Maine Beer Trail

15% - Baxter State Park



Next Most Popular

10% - Moosehead Lake

10% - Reversing Falls

9% - Hollywood Casino

9% - Long Lake

9% - Maine Wildlife Park

7% - Black Mountain

7% - Mt. Katahdin

Visited by 6%

Kennebec Rail Trail

Maine Discovery Museum

Lily Bay State Park

Dysart's Restaurant and Truckstop

Moosehorn Wildlife Refuge

Visited by 5%*

Sebago Lake State Park

Oxford Casino

Bangor Waterfront Concert Series

Capitol Building

Belgrade Lakes

Quoddy Head State Park

Old Sow Whirlpool

St. Croix Island International Historic Site

Collins Center for the Arts

Peaks Kenny State Park

Moosehead Marine Museum

Sebec Lake

UMaine Museum of Art

Aroostook State Park

(n=1346)

** Does not show activities selected by less than 5% of respondents.*

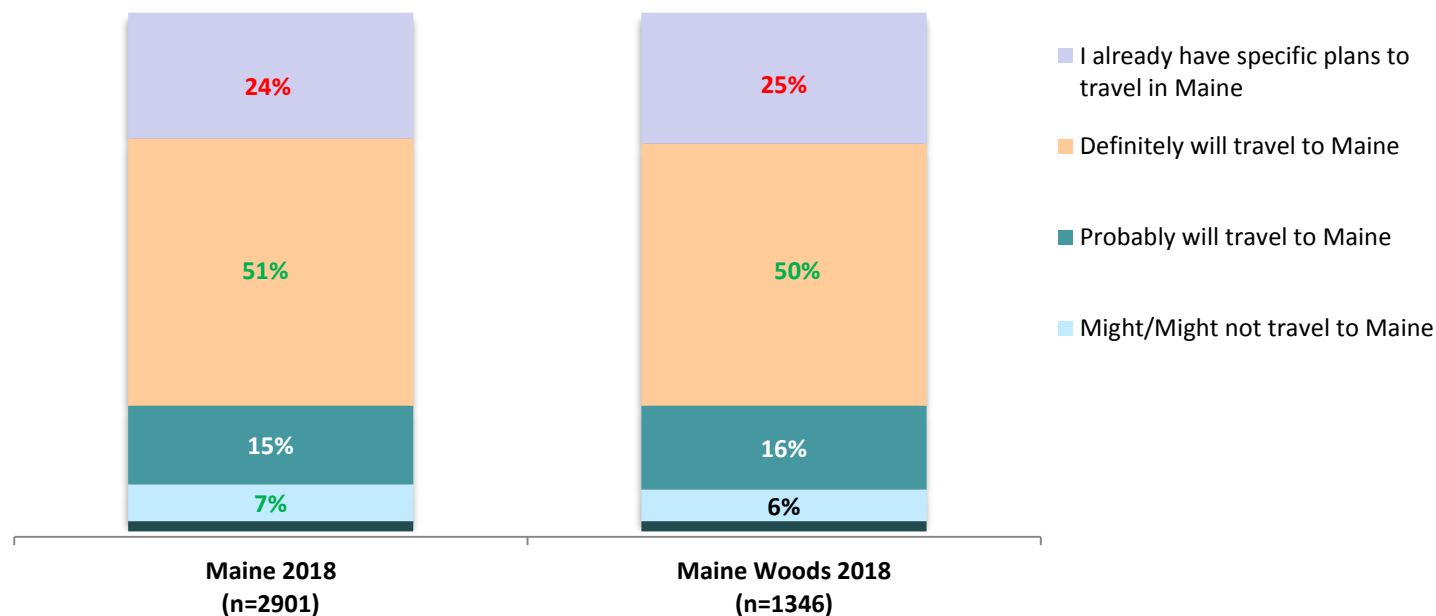
Q32 Within the region you visited, what specific towns or cities did you visit? *Please check all that apply.*

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

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

Three out of four visitors to the Maine Woods and state overall in 2018 were almost certain to return to the state in the next two years.

LIKELIHOOD OF TRAVEL TO MAINE NEXT TWO YEARS



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

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

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

DAY VISITORS



Day Visitors: Traveler Profile



The average surveyed day visitor to the Maine Woods area in 2018 was 42 years old and had a household income of about \$65,000. Half or more had a college degree or were employed full-time.

- ❖ Although they were generally demographically similar, day visitors to the Maine Woods area had much lower incomes than day visitors to the state overall.

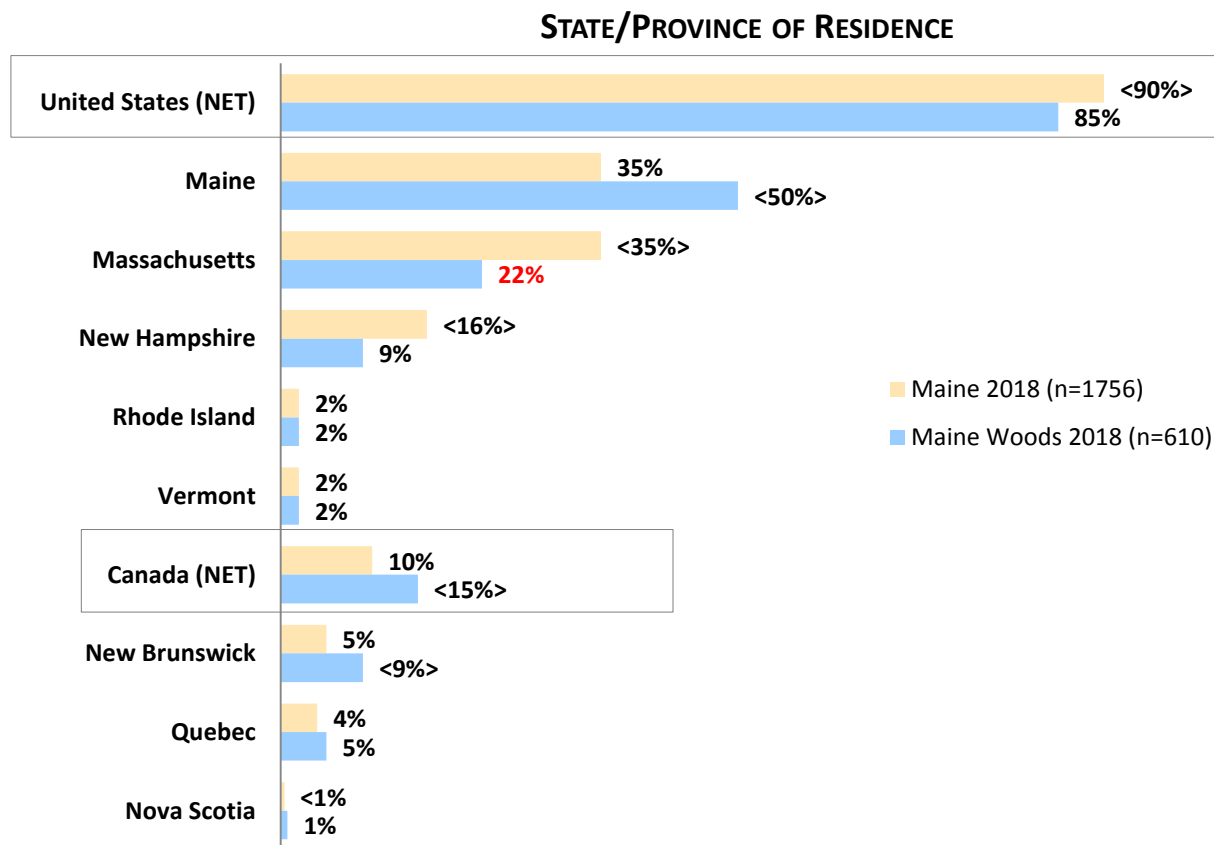
	Maine 2018 (n=1756)	Maine Woods 2018 (n=610)
Age:		
< 35	37%	39%
35 - 44	18%	20%
45 - 54	16%	14%
55 +	28%	27%
Mean	<43.0>	41.5
Income:		
< \$50,000	38%	<50%>
\$50,000 - \$99,999	<39%>	34%
\$100,000 +	<22%>	16%
Mean	<\$74,130>	\$64,050
Female	78%	76%
College degree or higher	58%	56%
Married	49%	45%
Employed full-time	49%	51%

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

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

More than eight out of ten day visitors to the Maine Woods area were residents of the U.S. Half of all day visitors were from Maine.

- ❖ Visitors to the area were more likely than those to the state as a whole to be from Maine or Canada, but were less likely to be from Massachusetts or New Hampshire.

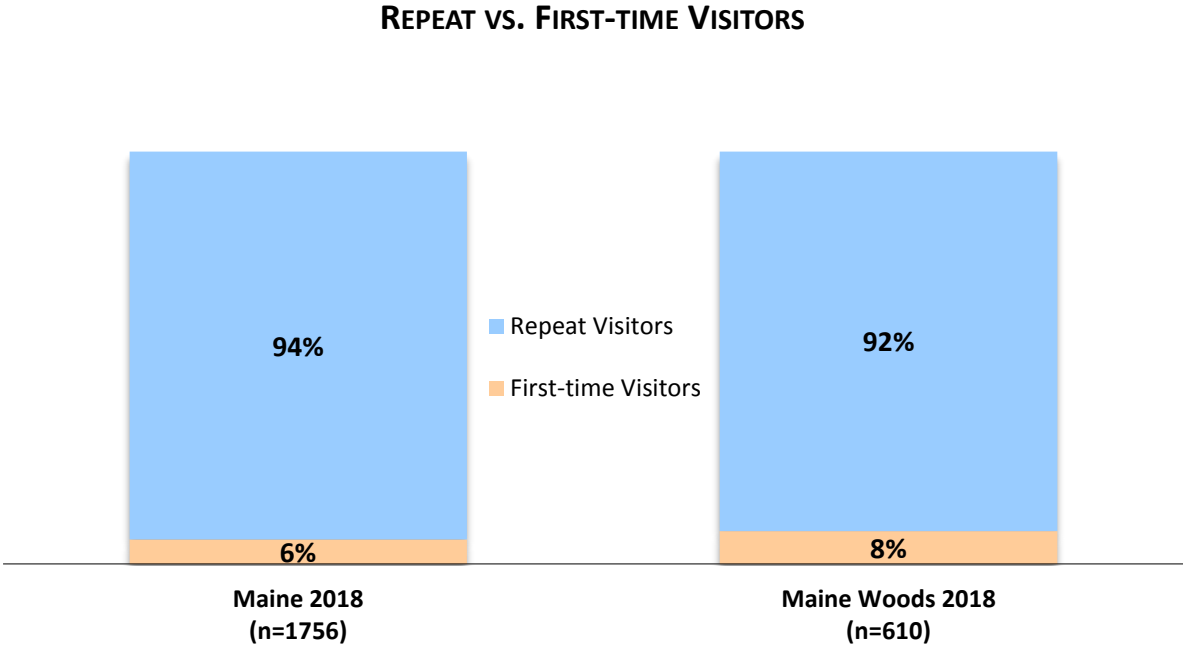


Q2. In what state or province do you live?

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

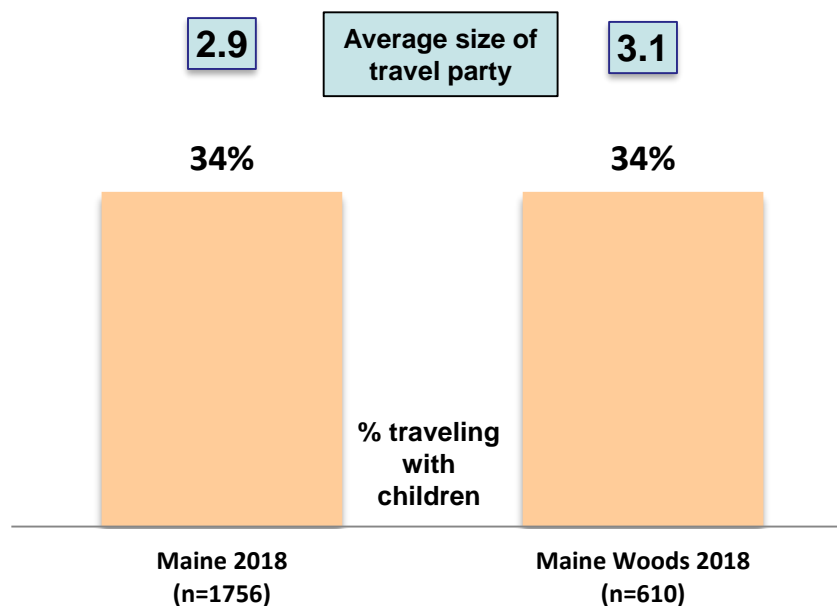
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Only about one out of ten day visitors to the area were visiting the state for the first time.

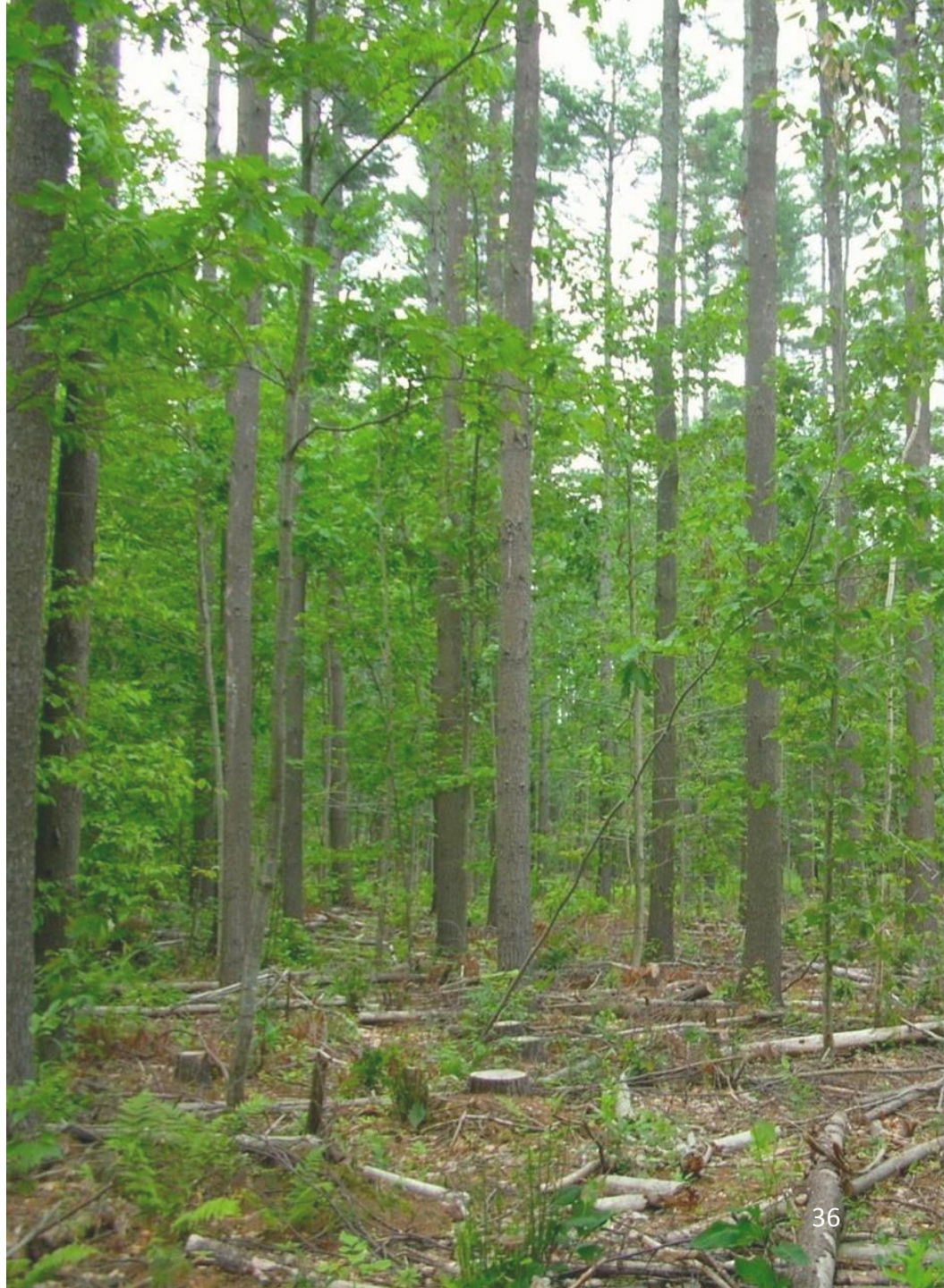


The typical travel party visiting the Maine Woods area for the day had three people. One-third of travel parties included children.

TRAVEL PARTY SIZE AND COMPOSITION

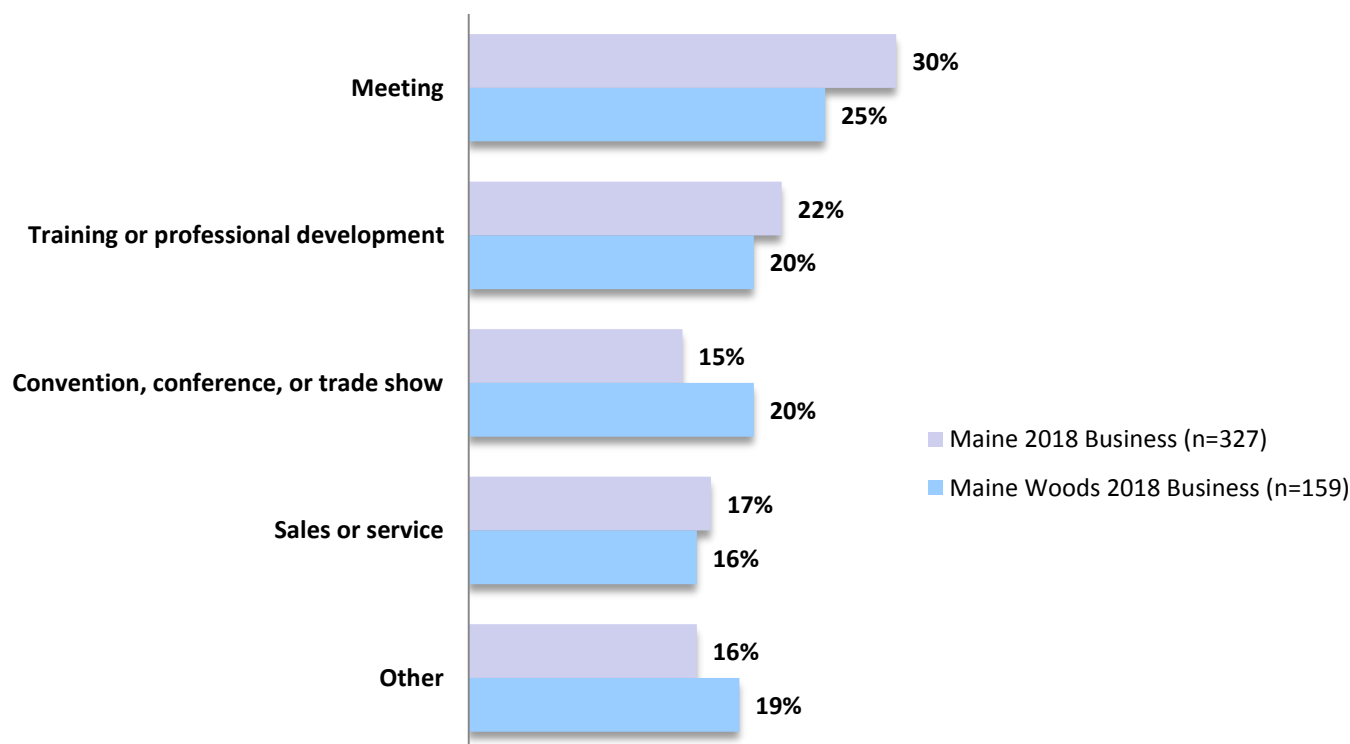


Day Visitors: Trip Experience



Day business trips to the area were equally likely to be driven by meetings, training, conferences, and sales.

PRIMARY PURPOSE OF DAY BUSINESS TRIPS



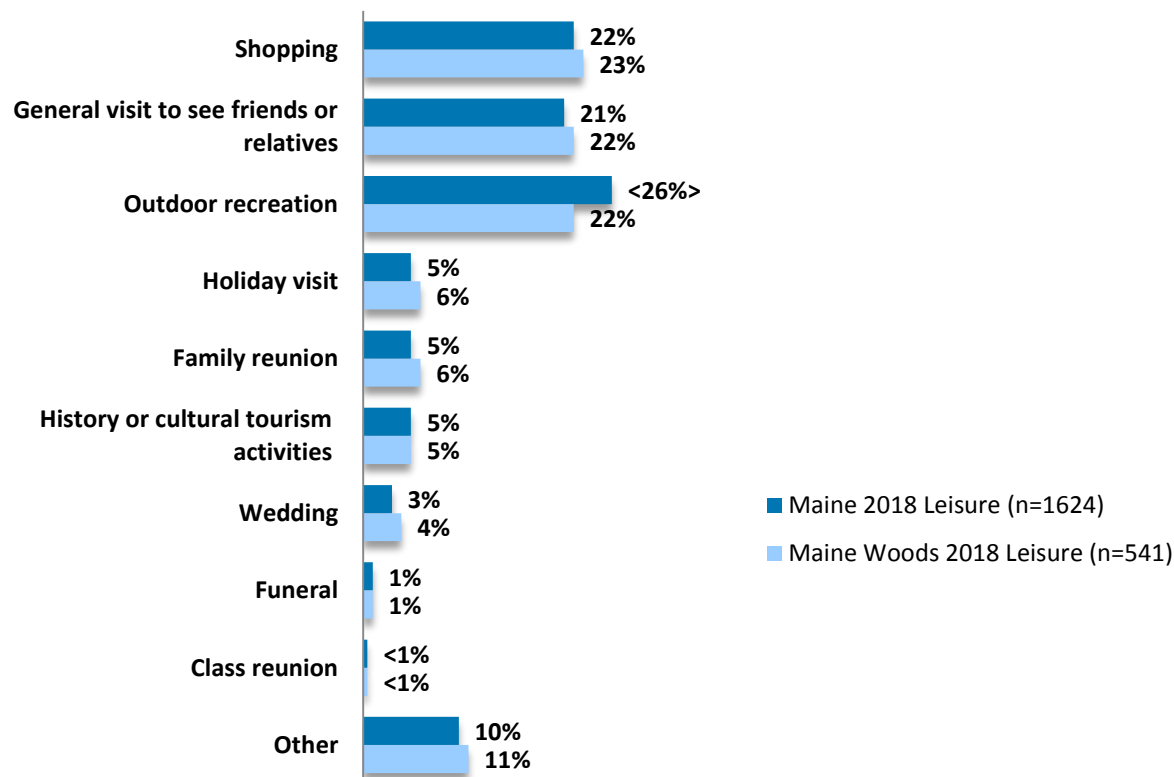
Q8. What was the primary purpose of your most recent business trip in Maine?

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

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

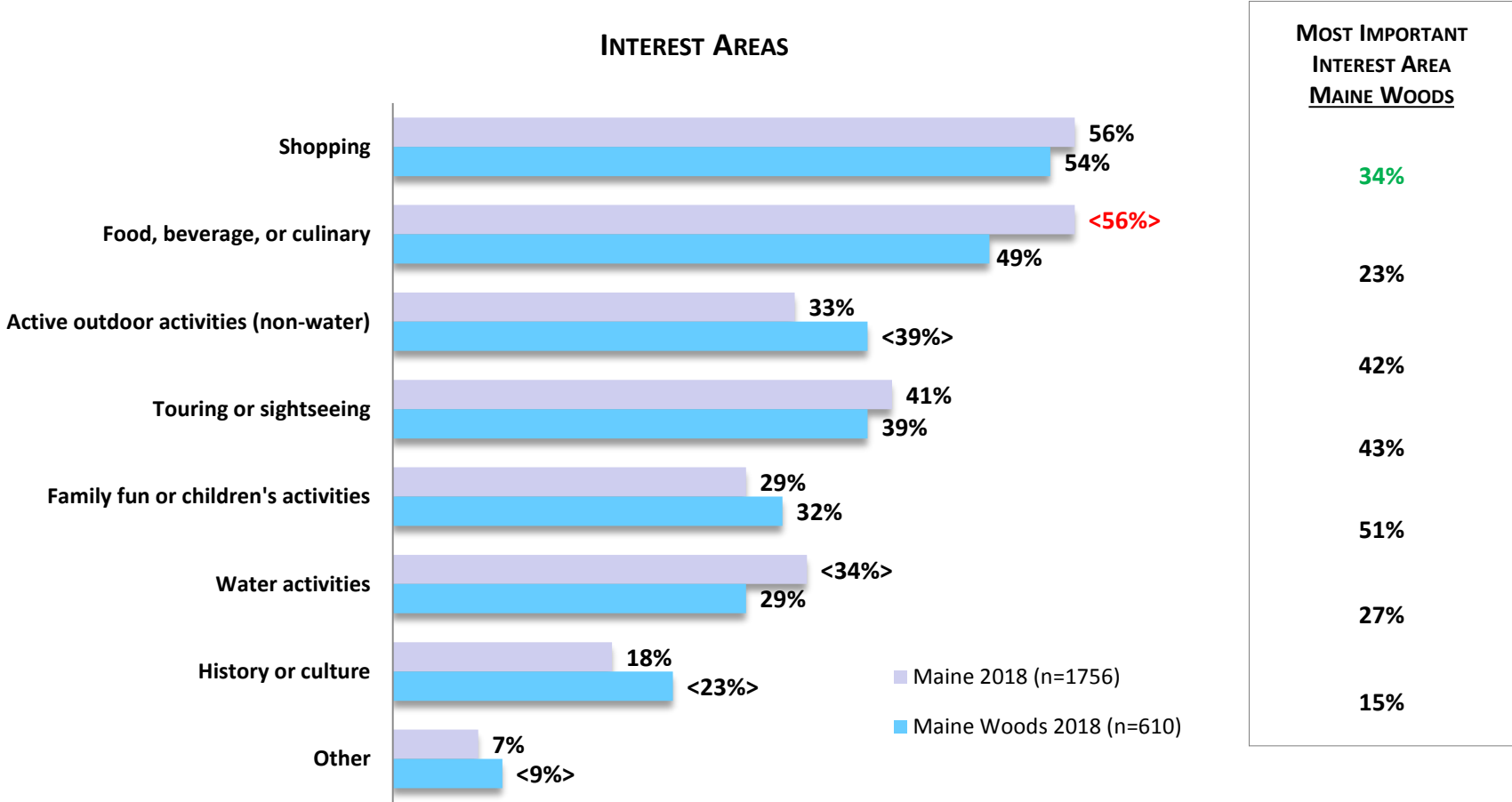
Day leisure trips were most often driven by shopping, visits to friends or relatives, and outdoor recreation.

PRIMARY PURPOSE OF DAY LEISURE TRIPS



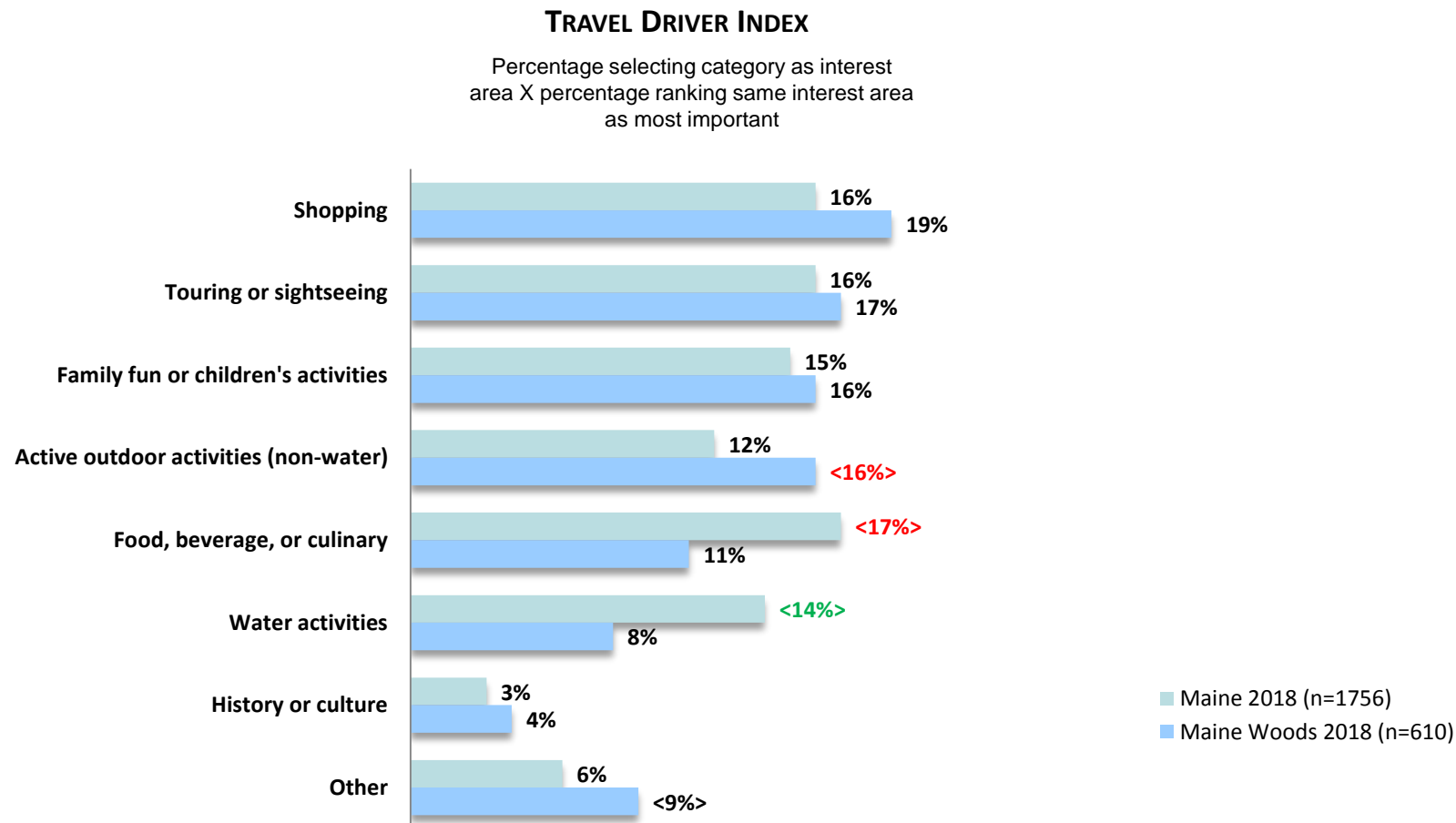
Shopping and culinary activities were the *most common* interests among day travelers to the area and state. Family fun, sightseeing, and active outdoor activities were especially likely to be seen as *most important*.

- ❖ Outdoor activities on land and cultural activities were more common on day trips to the area than on such trips to the state overall, while culinary activities and water activities were less common in the area.



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 subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

The top drivers of day trips to the Maine Woods area in 2018 included shopping, sightseeing, family fun, and active outdoor activities.

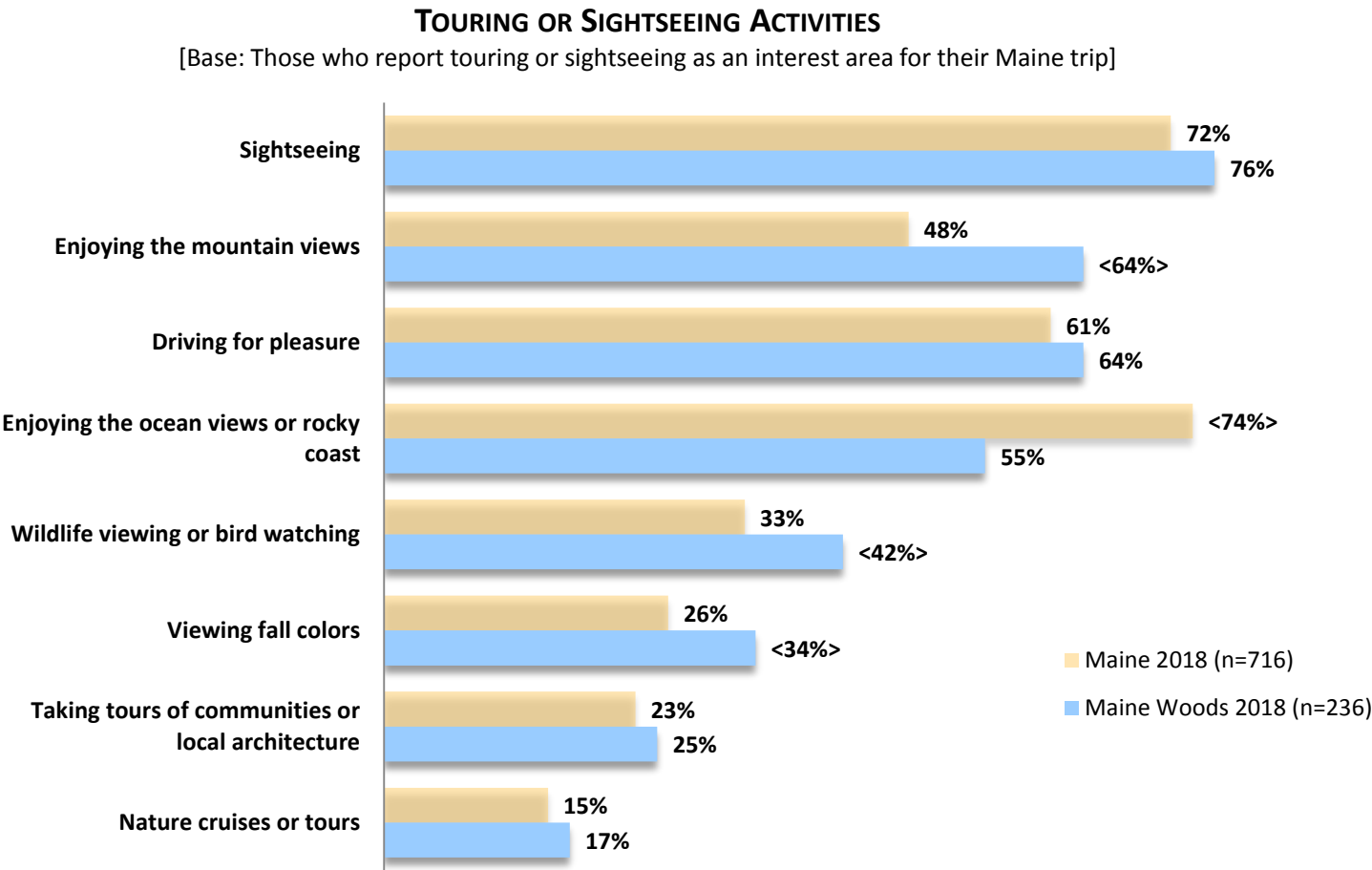


Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

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 subgroups at the 95% confidence level. Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Sightseeing was the most common touring activity on day trips to the Maine Woods area in 2018, followed by enjoying mountain views, driving for pleasure, and enjoying the coastal views.

- ❖ Enjoying mountain views, watching wildlife, and viewing fall colors were more popular in the area than the state overall, while enjoying the coast was less common in the area.

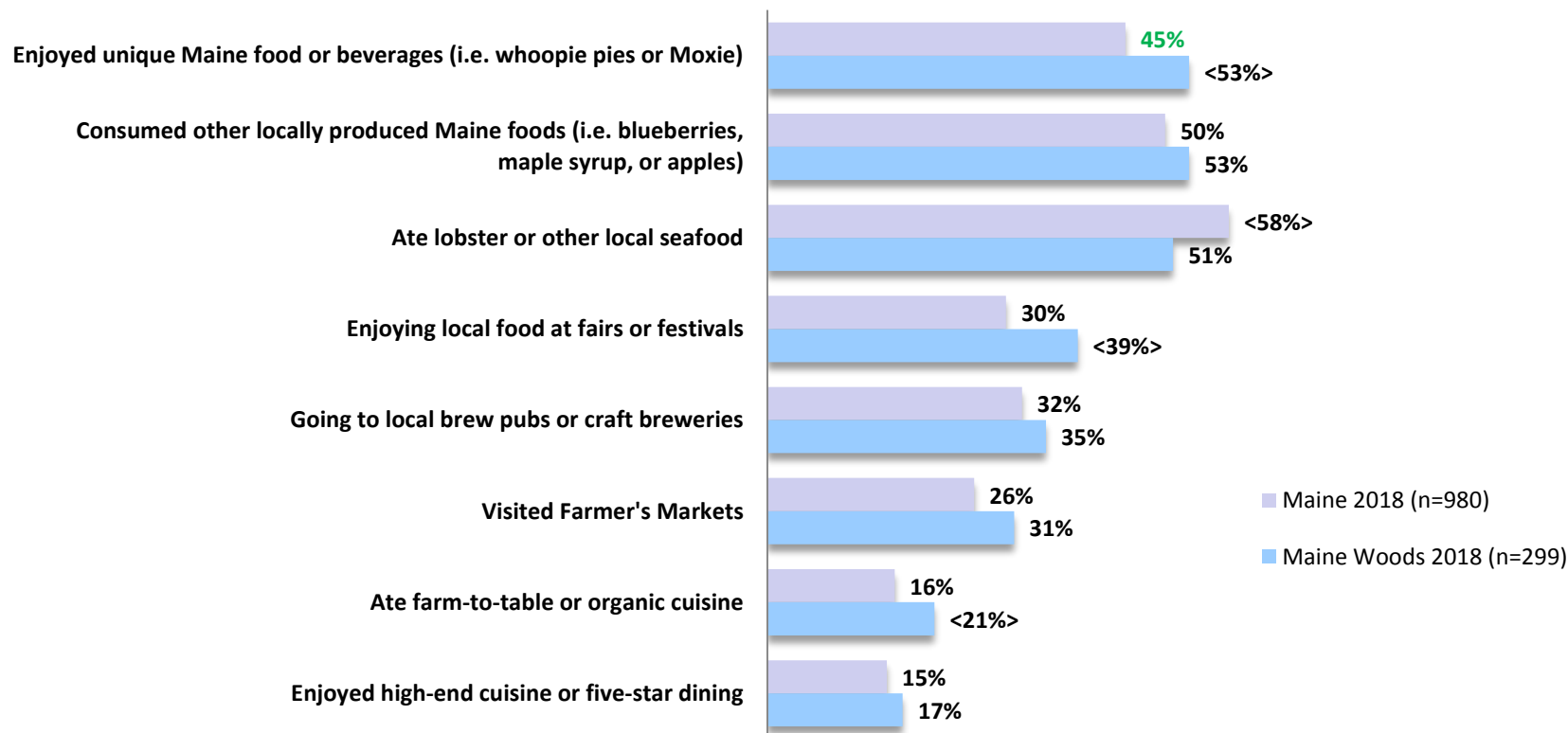


The most common culinary activities on day trips to the area included enjoying unique Maine foods and enjoying various local foods from the land and sea.

- ❖ Visitors to the area were more likely than visitors to the state overall to enjoy unique Maine foods, foods at fairs or festivals, and organic food, but were less likely to enjoy local seafood.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

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



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

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

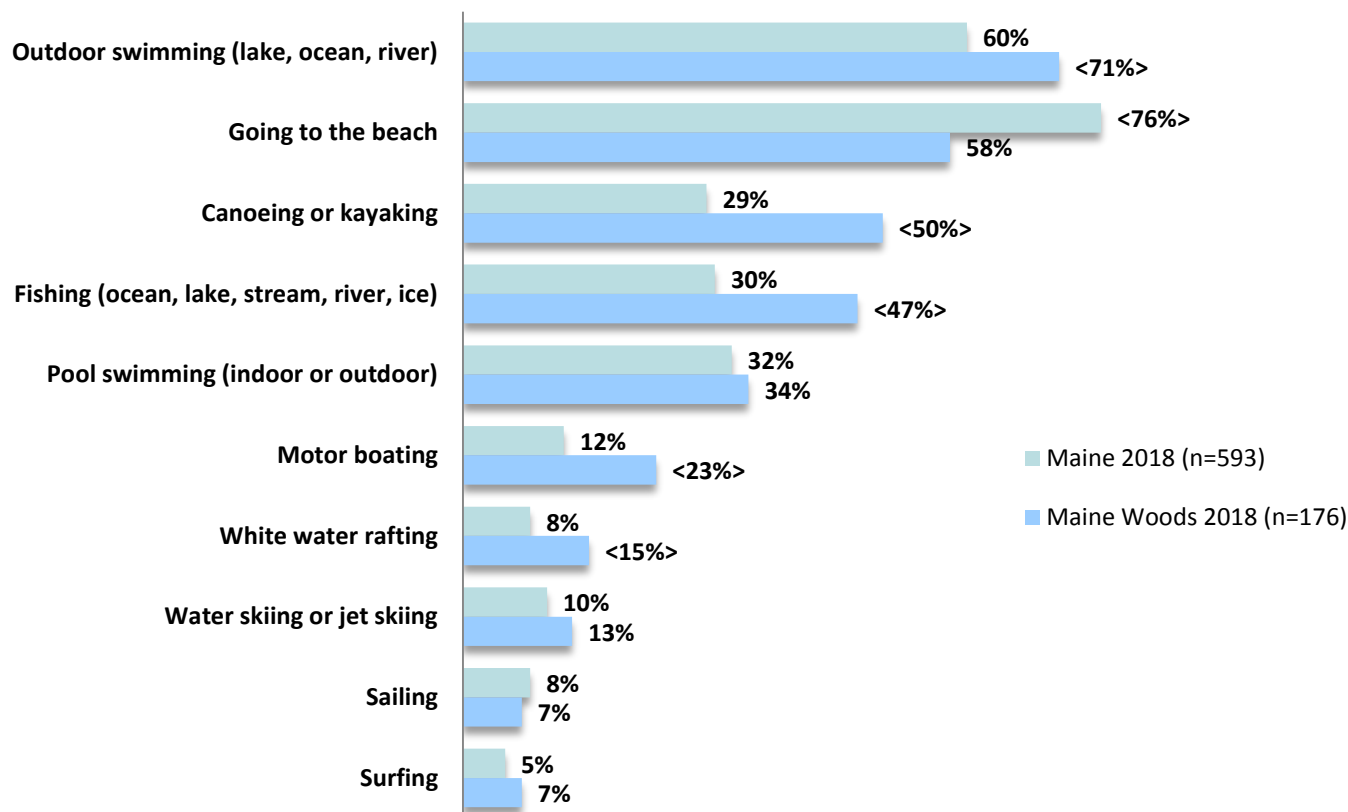
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outdoor swimming was the most popular water activity in the area, followed by going to the beach, canoeing or kayaking, and fishing.

- ❖ Going to the beach was less common on day trips to the area than on day trips to the state as a whole, though many other water activities were more common on trips to the area.

WATER ACTIVITIES

[Base: Those who report water activities as an interest area for their Maine trip]



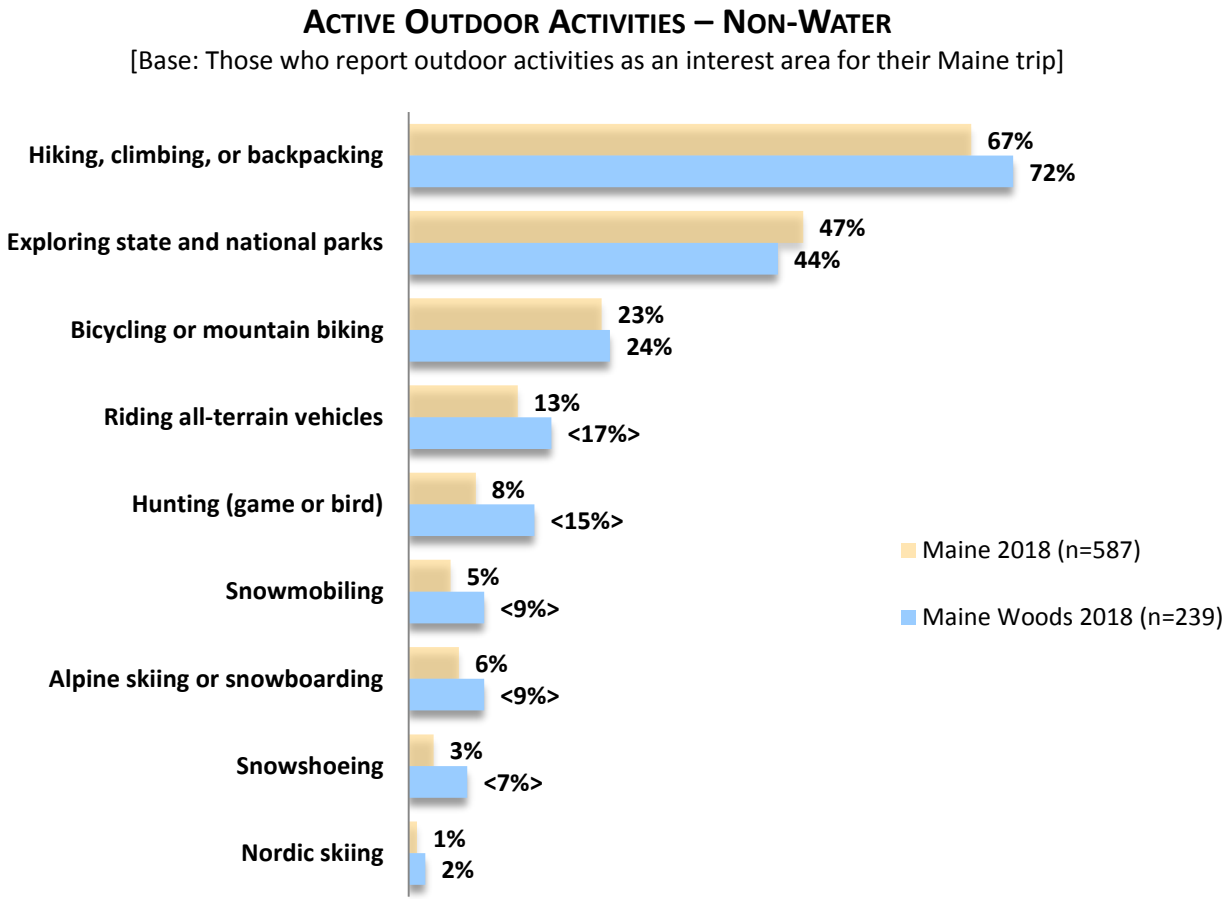
Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

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

Hiking and related pursuits were the most common active outdoor activities on day trips to the area in 2018, followed – distantly – by exploring state and national parks.

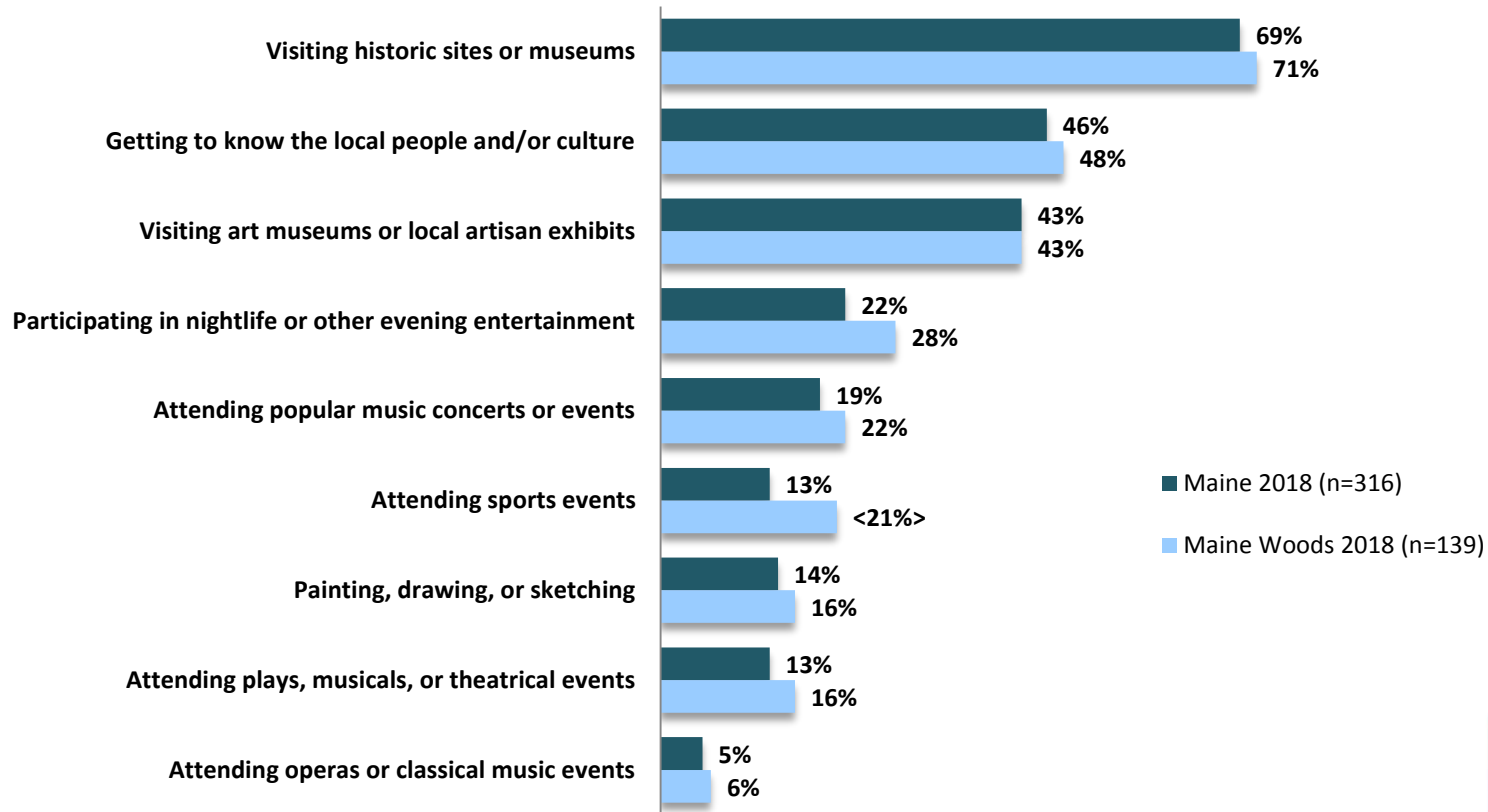
- ❖ Several activities were more popular on day trips to the area than on such trips to the state overall, including riding ATVs, hunting, snowmobiling, skiing, and snowshoeing.



Visiting historic sites or museums was the most common cultural activity on day trips to the area, followed by getting to know the local culture and going to art displays.

HISTORY OR CULTURE ACTIVITIES

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



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

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

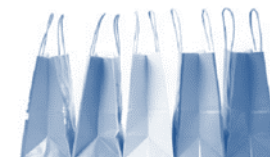
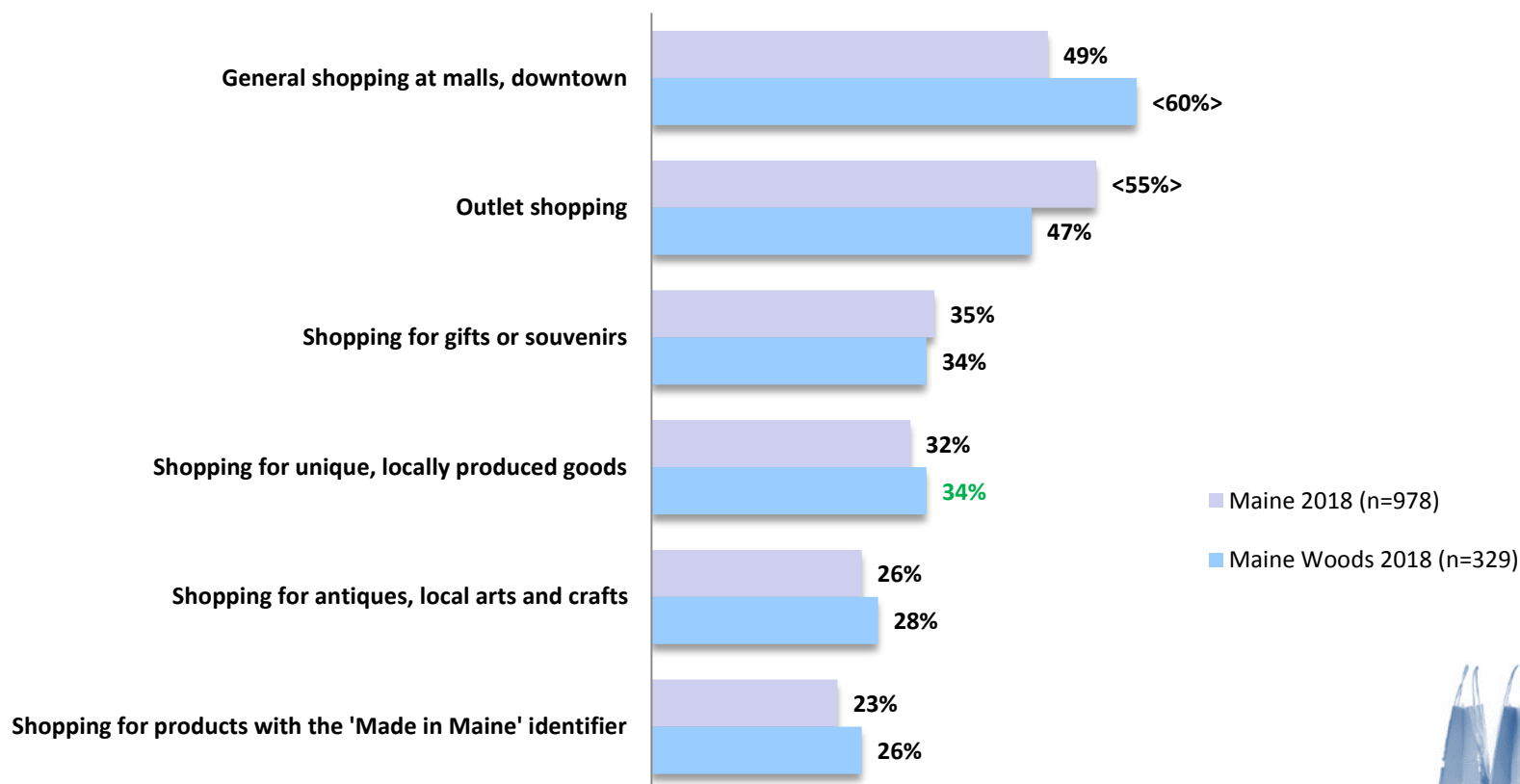
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General shopping in downtown areas or malls was the most common form of shopping in the region in 2018.

- ❖ Shopping in malls or downtown areas was more common in the Maine Woods than across the state, but outlet shopping was relatively less common in the area.

SHOPPING ACTIVITIES

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



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

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

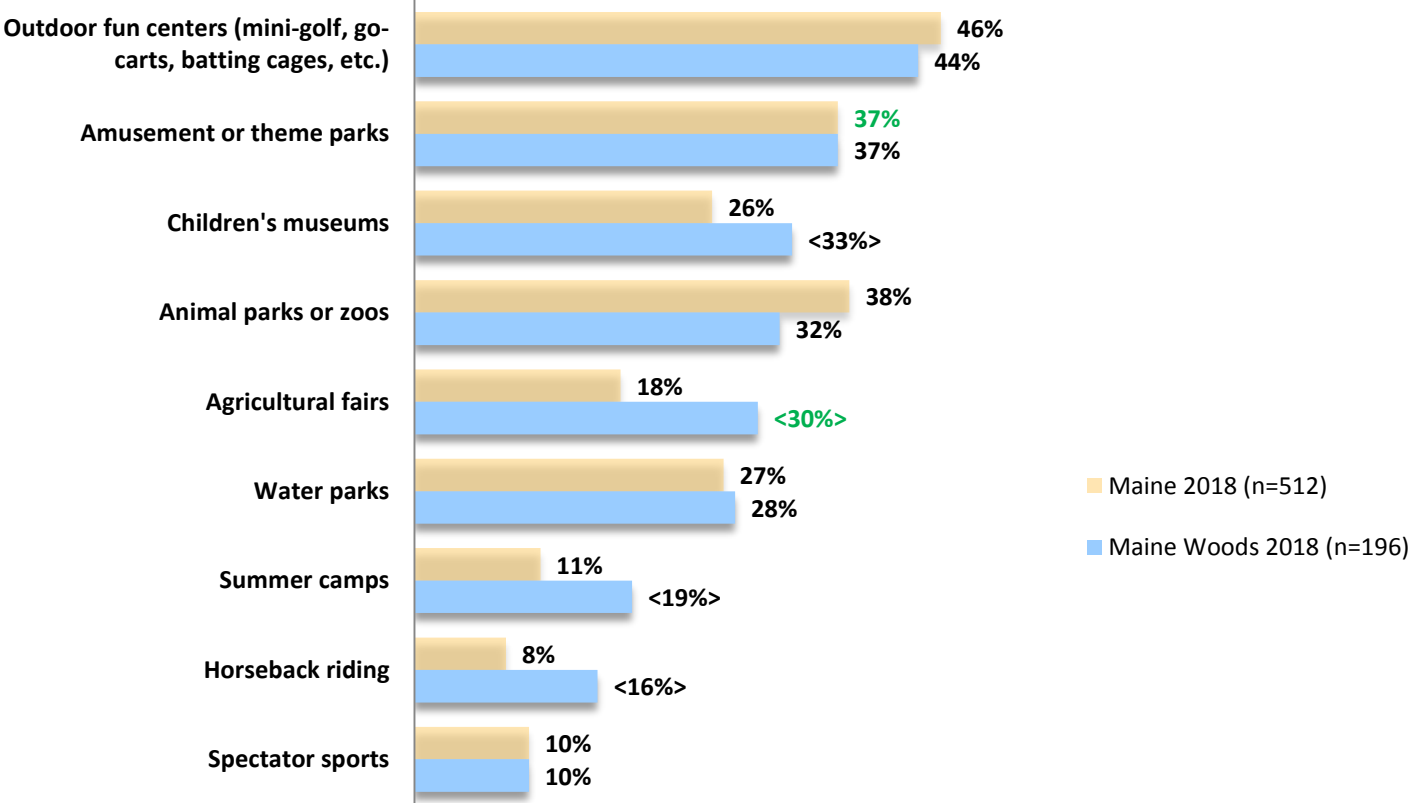
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Going to outdoor fun centers was the most popular family fun activity on day trips to the area, followed by going to amusement parks, children’s museums, zoos, agricultural fairs, and water parks.

- ❖ Day visitors to the area were more likely than their statewide counterparts to go to children’s museums, agricultural fairs, and summer camps, and were also more likely to ride horses.

FAMILY FUN OR CHILDREN’S ACTIVITIES

[Base: Those who report Family Fun or Children’s Activities as an interest area for their Maine trip]



The Bangor Mall was the most popular attraction on day trips to the Maine Woods area in 2018, followed by the Maine Beer Trail and Baxter State Park.

**Top Three
Destinations**

- 19% - Bangor Mall
- 11% - Maine Beer Trail
- 11% - Baxter State Park



Next Most Popular

- 9% - Moosehead Lake
- 9% - Sebago Lake State Park
- 9% - Belgrade Lakes
- 8% - Maine Wildlife Park
- 8% - Oxford Casino
- 8% Kennebec Rail Trail
- 8% - Maine State Museum

Visited by 7%

- Rangeley Lakes
- Maine Discovery Museum
- Dysart's Restaurant and Truckstop
- Reversing Falls
- Long Lake
- White Mountain National Forest
- Sunday River Ski Resort
- Grafton Notch State Park

Visited by 6%*

- Hollywood Casino
- Mt. Katahdin
- Bangor Waterfront Concert Series
- Capitol Building
- Moosehorn Wildlife Refuge
- Quoddy Head State Park
- Maine Discovery Museum
- Passamaquoddy Bay

(n=610)

** Does not include attractions visited by less than 6% of respondents.*



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 between December 2017 and November 2018. The number of respondents participating in each survey statewide is:

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



A Division of DRI

172 Commercial Street
Portland, ME 04101
207.985.7660

www.digitalresearch.com

