

**Maine Office of Tourism
Visitor Tracking Research
2015 Calendar Year Annual Report**

Maine Woods Area Special Report

Prepared by



May 2016

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Research Objectives and Methodology



Research Objectives and Methodology

- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors. The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from two national online panels – Research Now and Instantly (formerly Usamp).
- Information is gathered on an ongoing basis through three surveys:
 - **Maine Overnight Visitor Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada
 - Have taken an overnight trip to Maine in the past four weeks
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine's borders
 - Have taken a day trip in Maine that is at least 50 miles from home within the past four weeks
 - **National Omnibus Survey**
 - Includes a nationally balanced sample of US residents
 - To determine the incidence of travel nationwide and Maine's share of that travel
- Survey results were collected during calendar year 2015 for travel to Maine occurring from December 2014 through November 2015. The number of respondents participating in each survey is:
 - Maine Overnight Visitor Survey – 2,779
 - Maine Day Visitor – 1,755
 - National Omnibus Survey – 17,812

Research Objectives and Methodology

- The following report summarizes the results among visitors to the Maine Woods Area, an area made up of five of Maine's tourism regions:
 - Maine Lakes & Mountains,
 - Kennebec Valley,
 - The Maine Highlands,
 - Aroostook County, and
 - Washington County (a portion of the Downeast & Acadia region).
- In total, **1074 overnight visitors** and **500 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 and the State were calculated at the 95% confidence level and are noted throughout this report by < >.
- Statistically significant differences between 2014 and 2015 are also highlighted for the State of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.

Overnight Visitors: *Traveler Description*



Overnight Visitor Demographics

- Overnight visitors to the Maine Woods Area are 41 years old, on average, and have annual household incomes around \$97,000. Seven in ten have at least a college degree and are employed full time. Nearly two in three are married.
- Compared to all visitors to Maine, overnight visitors to the Maine Woods trend younger and have lower average annual household incomes. In addition, a higher proportion of overnight visitors to this area is employed full-time.

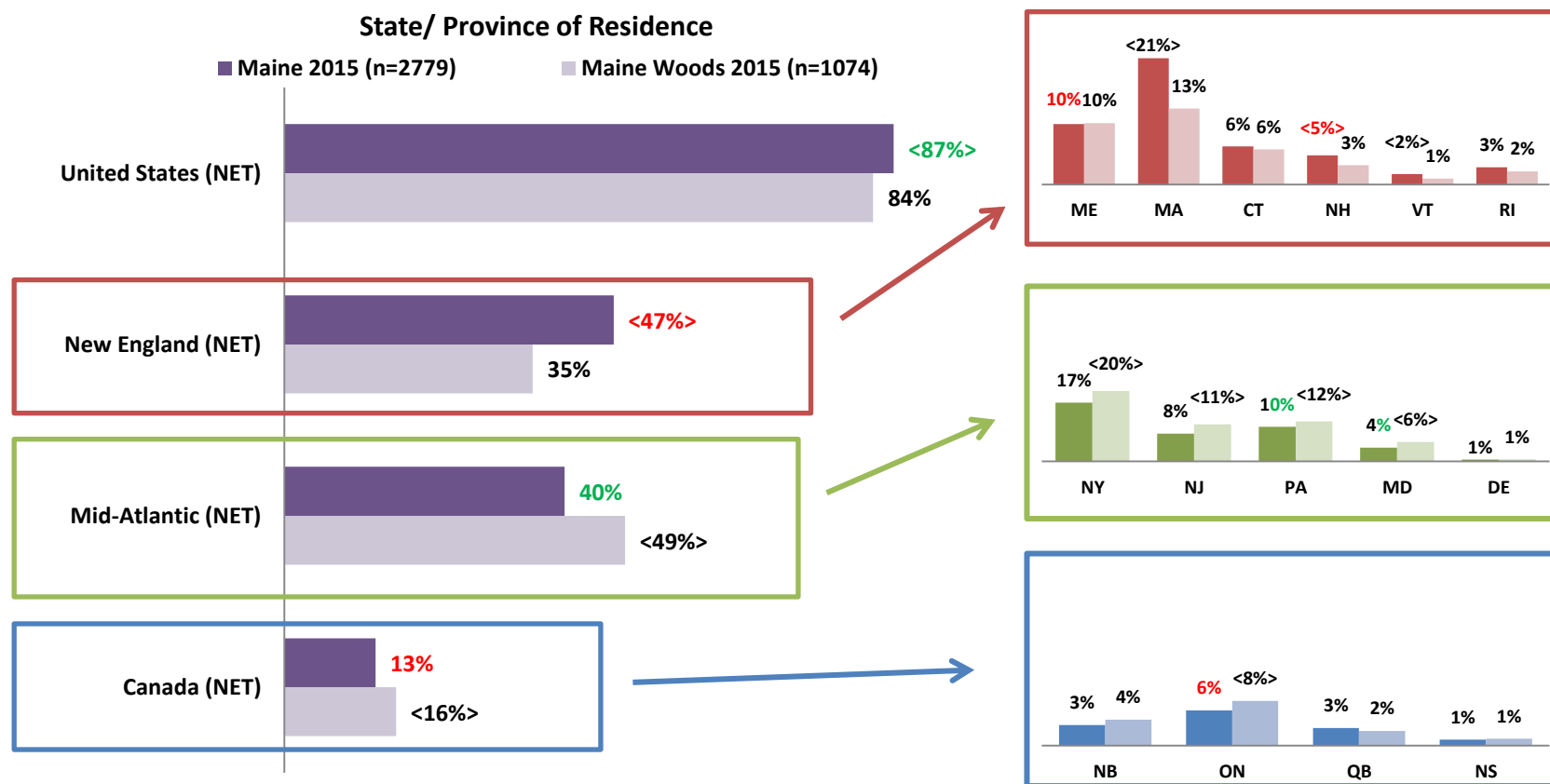
Overnight Visitors	Maine 2015 (n=2779)	Maine Woods 2015 (n=1074)
Age:		
< 35	30%	<40%>
35 - 44	19%	<25%>
45 - 54	<19%>	16%
55 +	<31%>	19%
Mean Age (Years)	<45.4>	40.6
Income:		
< \$50,000	17%	<20%>
\$50,000 - \$99,999	41%	42%
\$100,000 +	<42%>	37%
Mean Income (Thousands)	<103,770>	97,430
Female	<58%>	52%
College Degree or Higher	<73%>	70%
Married	64%	63%
Employed Full Time	63%	<70%>

<> 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.

Four in five overnight visitors to the Maine Woods Area are from the United States, with most arriving from the Mid-Atlantic region.

- Overnight visitors to the Maine Woods Area are less likely to be from New England (particularly Massachusetts), as compared to overnight visitors to the State as a whole. Maine Woods Area visitors are more likely than visitors to Maine overall to be from Canada or the Mid-Atlantic region.



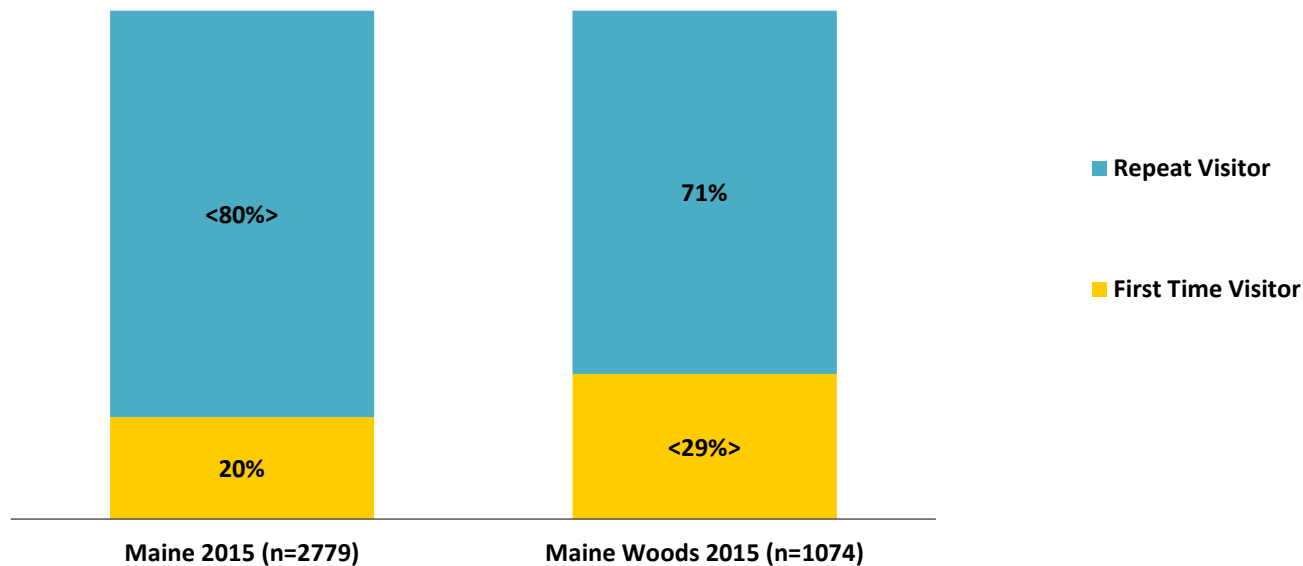
State/ Province of Residence

<> 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-fourth of overnight visitors to the Maine Woods are first time visitors, a greater proportion than among overnight visitors to Maine as a whole.

Repeat vs. First Time Visitors



Q11. Was this your first visit in Maine?

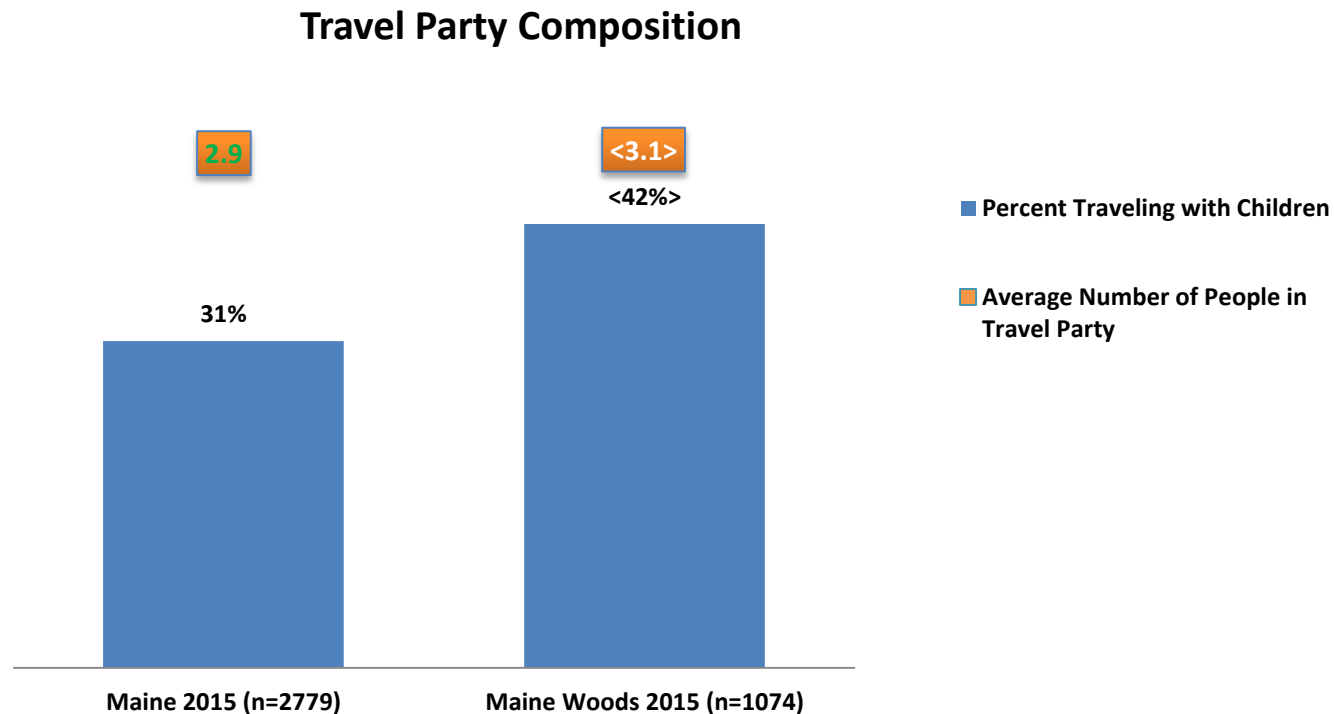
Q12. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

<> 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.

Two in five overnight visitors to the Maine Woods Area are traveling with children.

- A greater proportion of Maine Woods visitors travel with children compared to visitors to the State overall.



Q18. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Q19. How many of these people were: Children?

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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.

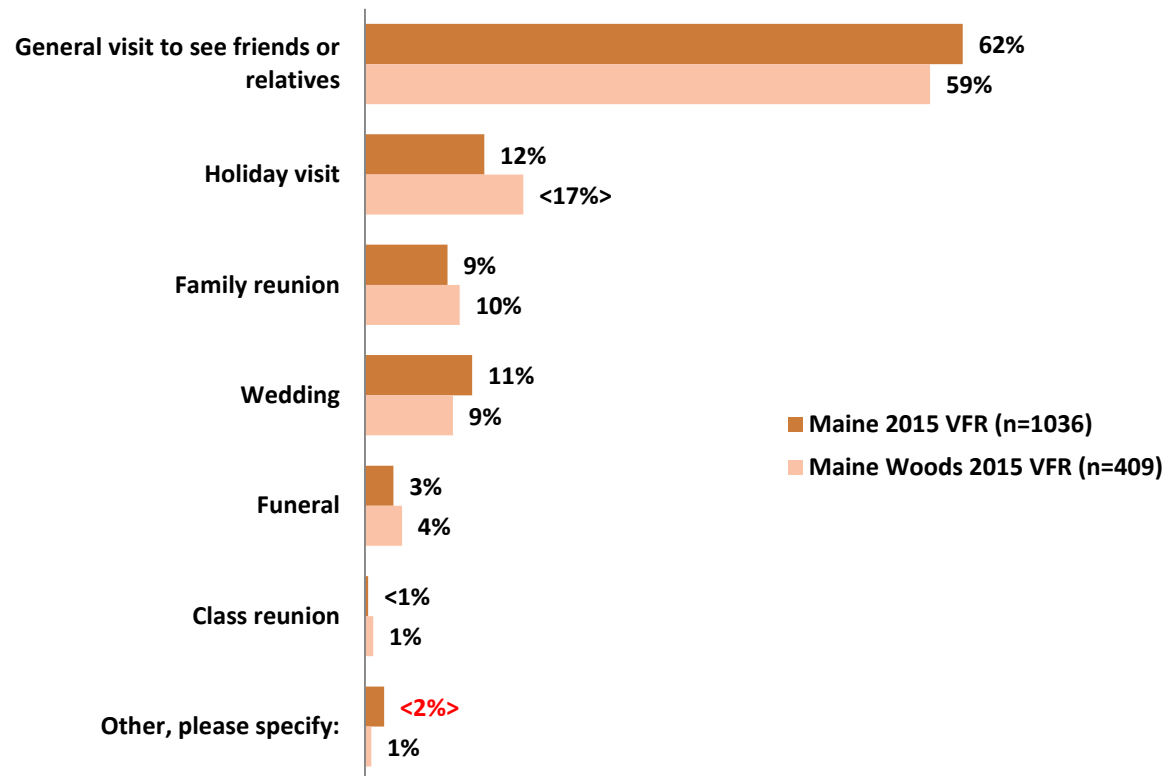
Overnight Visitors: *Trip Experience*



The most common reason for an overnight VFR trip to this region is a *general visit to see friends or relatives*.

- More Maine Woods overnight visitors come for a *holiday visit* compared to overnight visitors to the State overall.

Primary Purpose of Overnight VFR Trips



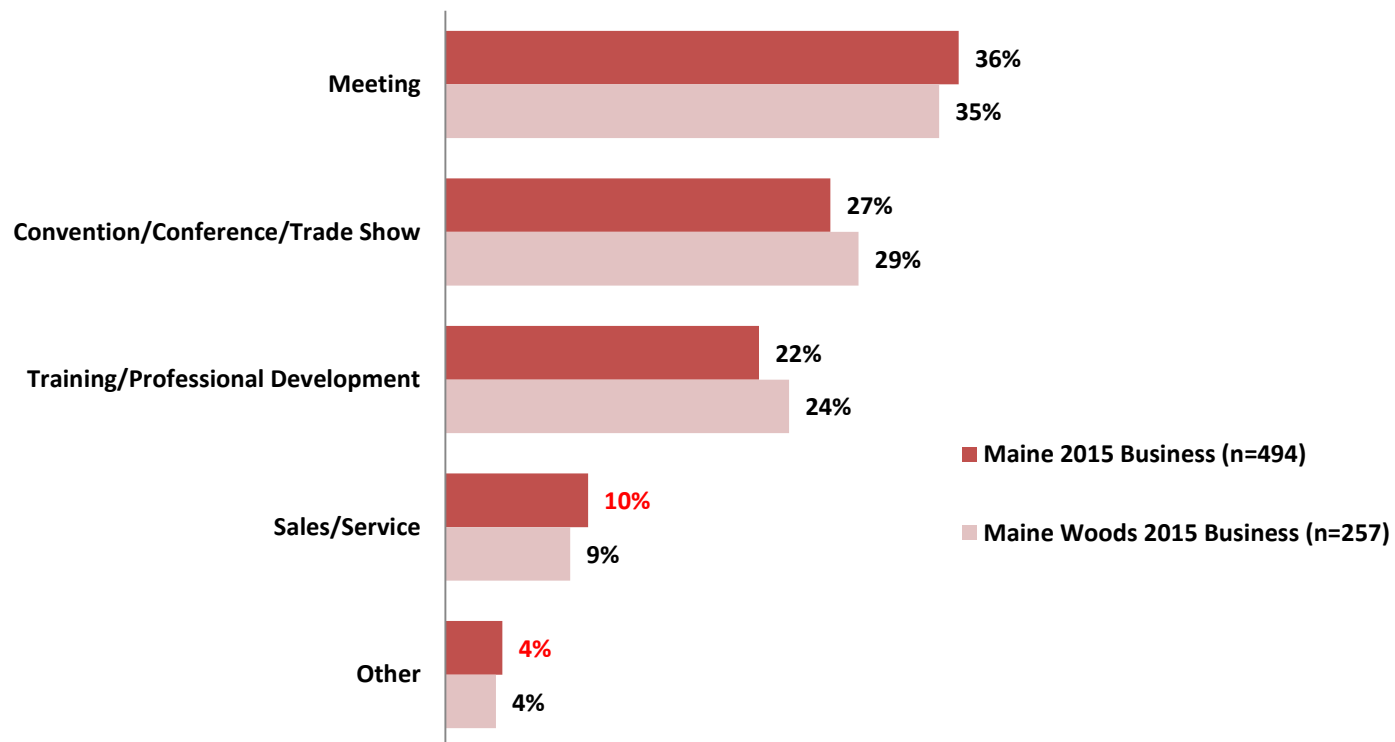
Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?

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

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

One in three business travelers to the Maine Woods Area come for a meeting.

Primary Purpose of Overnight Business Trips



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

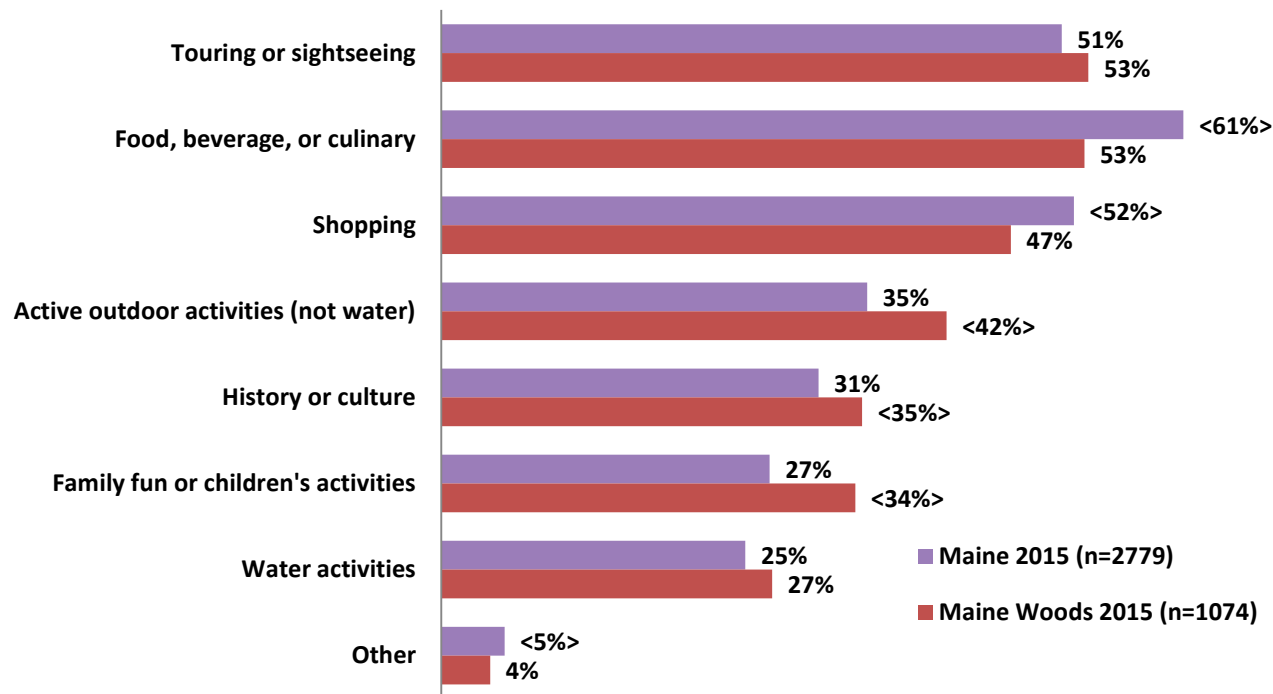
<> indicates a significant difference between subgroups at the 95% confidence level.

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

The most common interest areas among overnight visitors to the Maine Woods Area are *touring/sightseeing* and *food/beverage/culinary activities*.

- Despite the interest of about half of Maine Woods visitors in *food/beverage/culinary* and *shopping* activities, a lower proportion overall are interested in these activities compared to all Maine visitors.
- Greater proportions of Maine Woods visitors are interested in *active outdoor, history or culture, and family fun/children's activities*, compared to Maine visitors overall.

2015 Interest Areas



Most Important Interest Area Maine Woods

51%
26%
22%
37%
<27%>
43%
21%
89%

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

Q30. 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. 14

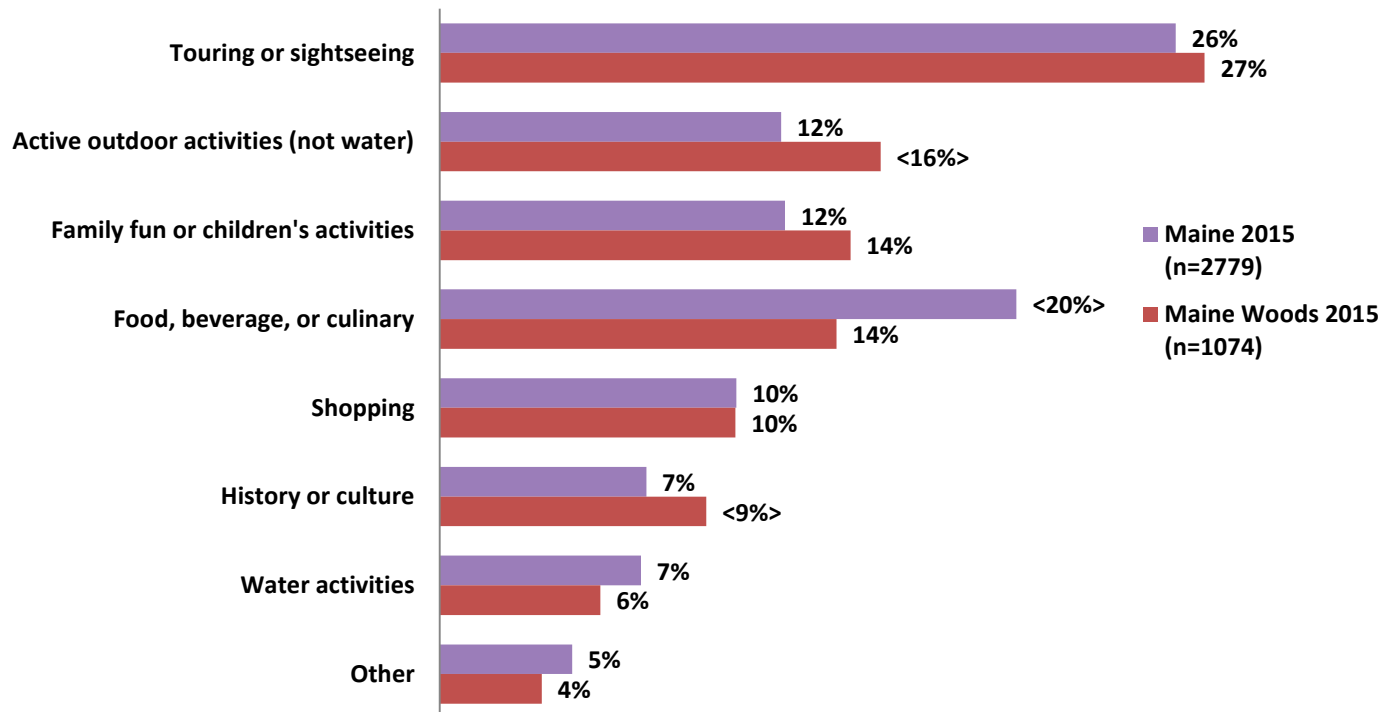
<> indicates a significant difference between subgroups at the 95% confidence level.

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

When analyzing both interest and importance when deciding to visit, *touring/sightseeing* ranks highest among the area's overnight visitors.

- When looking at both interest and importance, overnight visitors to the Maine Woods area rank *active outdoor activities* and *history/culture activities* higher than do overnight visitors to the State as a whole. In contrast, Maine Woods visitors rank *food/beverage/culinary activities* lower than visitors to Maine overall.

2015 Interest Areas Importance Index



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q29. Which of the following *interest areas* did you want to pursue during this trip to Maine? Please check all that apply.

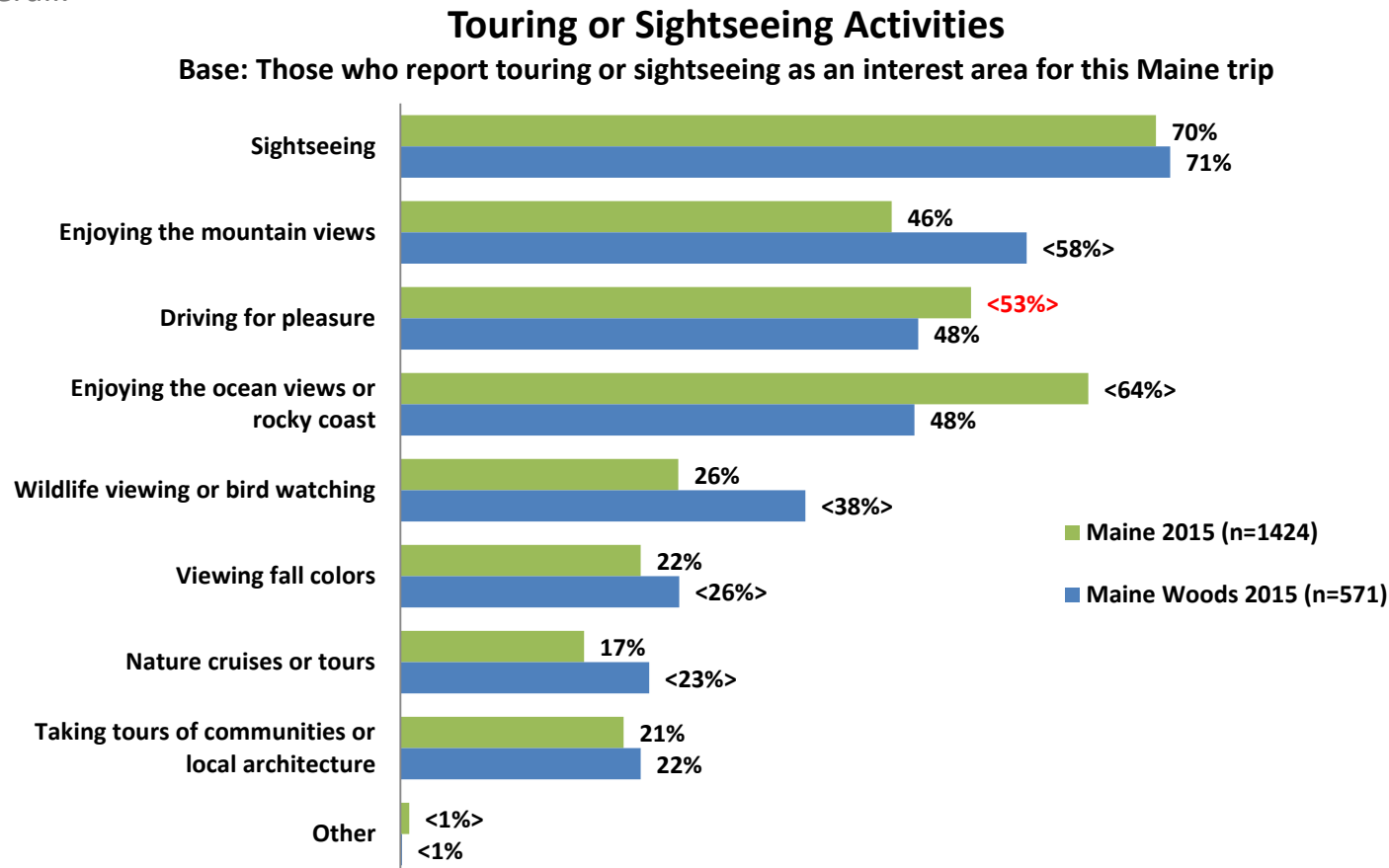
Q30. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 15

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

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

The most common touring/sightseeing activities among Maine Woods overnight visitors are *sightseeing* and *enjoying mountain views*.

- Compared to overnight visitors to all of Maine who are interested in touring/sightseeing activities, a greater proportion of these visitors to the Maine Woods area take part in a number of different types of activities. *Enjoying mountain views* and *wildlife viewing/bird watching* are two examples. In contrast, Maine Woods visitors are less likely to *drive for pleasure* or *enjoy the ocean views or rocky coast* as compared to Maine visitors overall.



Q31. 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.

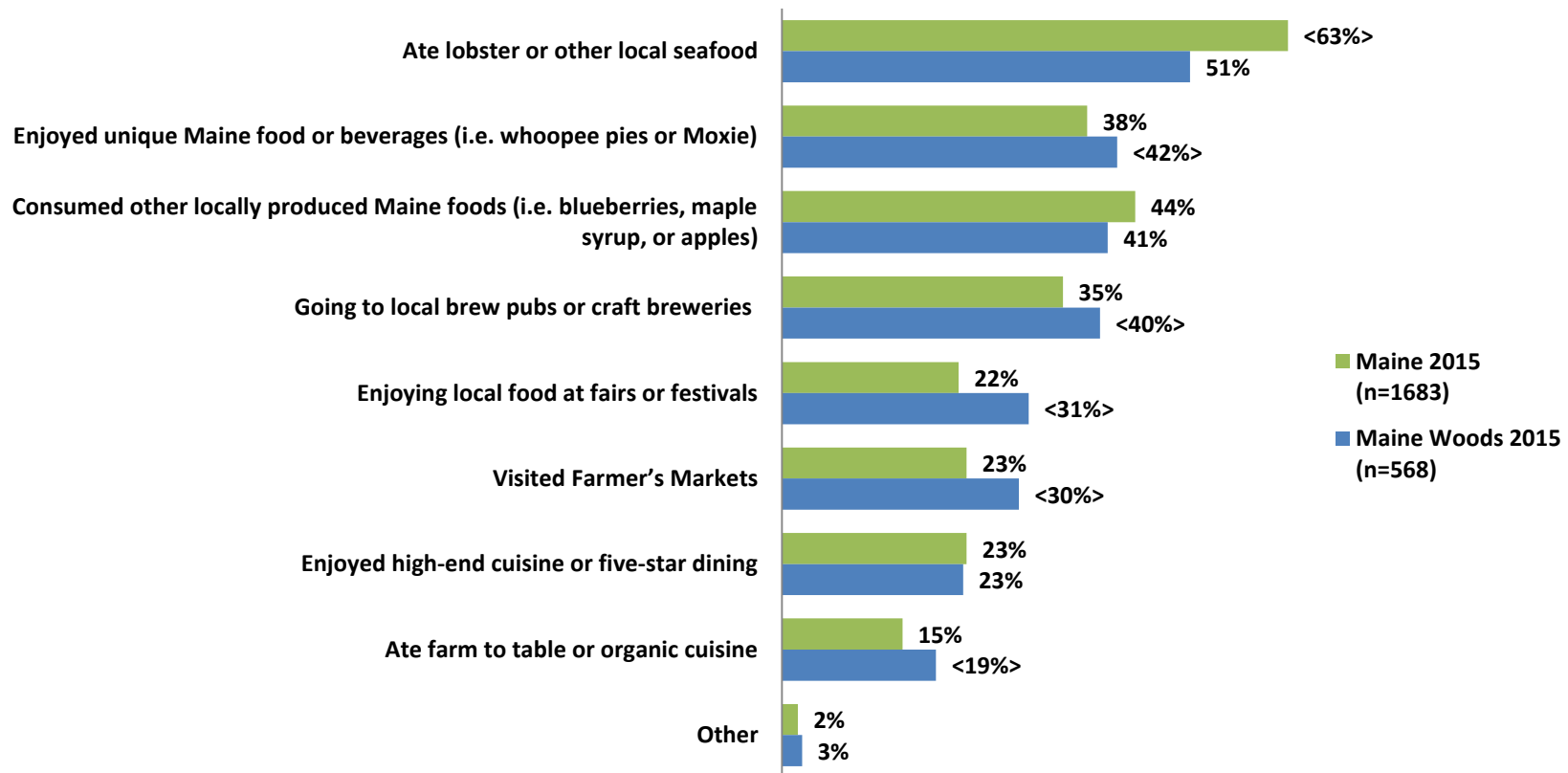
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of visitors to the Maine Woods who are interested in food/beverage/ culinary activities *ate lobster or other local seafood* while visiting.

- However, *eating lobster or other local seafood* is not as common among Maine Woods overnight visitors as it is among visitors to the State of Maine as a whole. In fact, although less common overall, higher proportions of the area's visitors enjoy nearly all other food, beverage, or culinary activities when compared to visitors to Maine as a whole.

Food, Beverage, or Culinary Activities

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



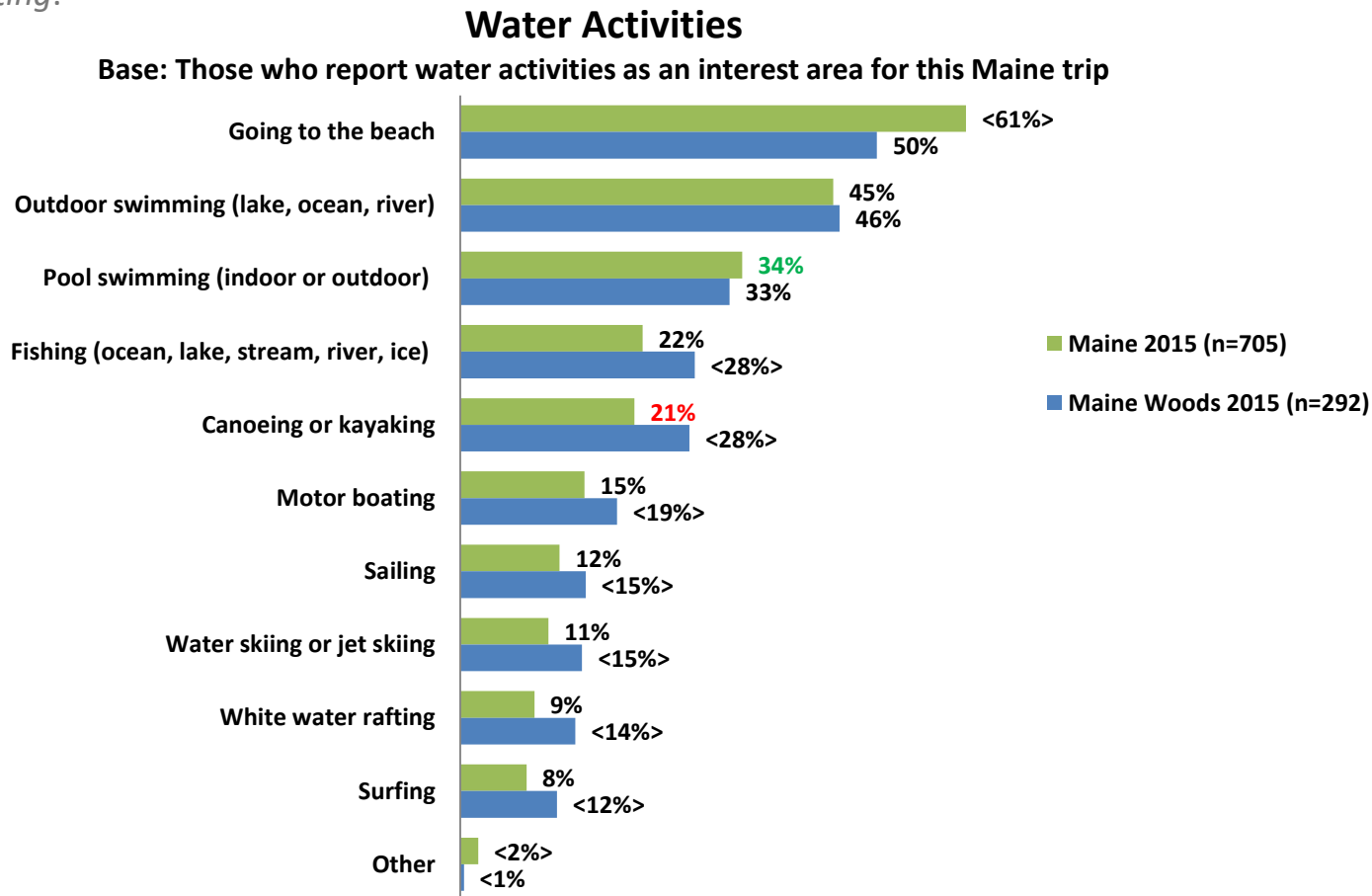
Q31. In which of the following activities did you participate during this trip? Please check all that apply.

<> 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 are the most common water activities among overnight visitors to the Maine Woods area.

- Maine Woods visitors who are interested in water activities appear to have a broader interest in these activities compared to Maine visitors overall. While fewer *go to the beach* compared to all State visitors, greater proportions participate in a number of other activities, including *fishing*, *canoeing/kayaking*, and *motor boating*.



Q31. 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.

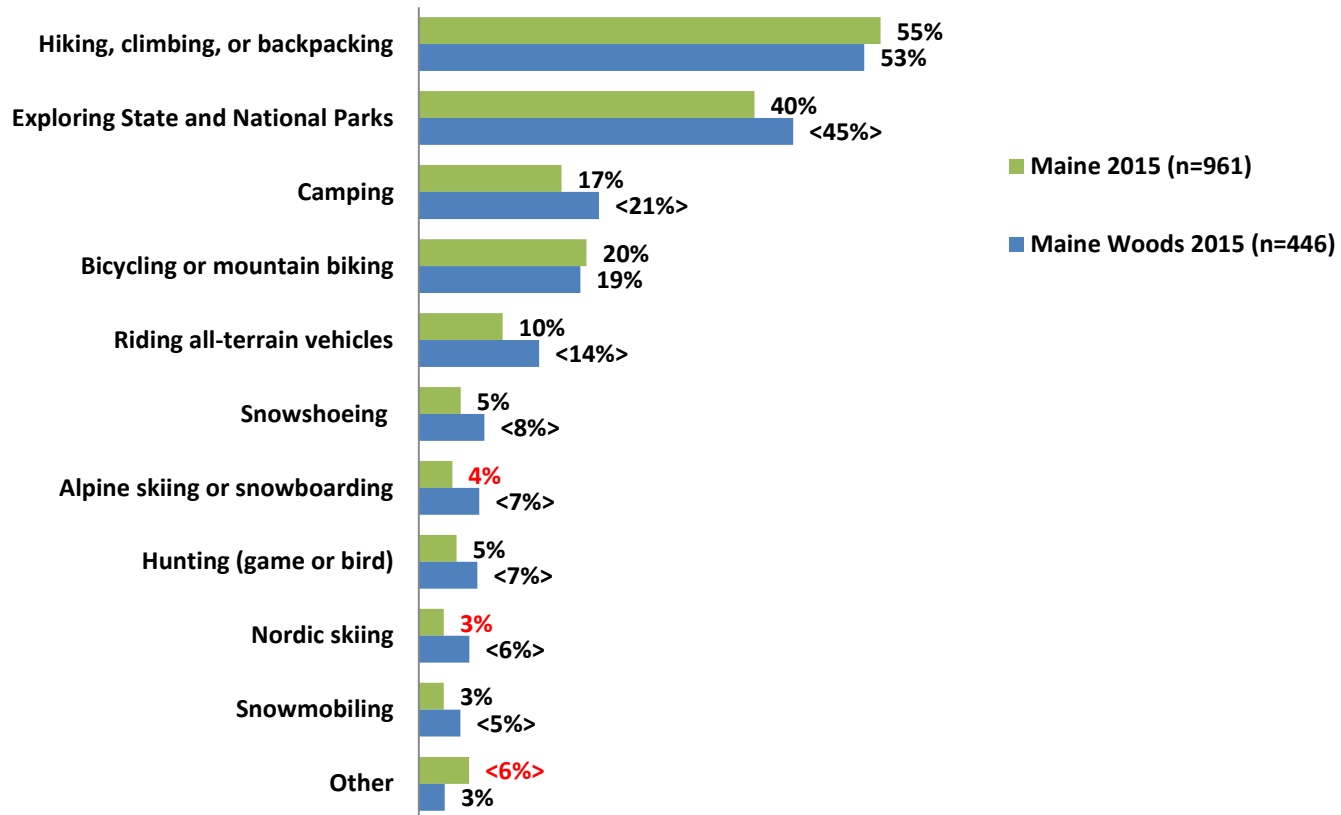
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Hiking/climbing/backpacking is the most common outdoor activity among Maine Woods overnight visitors.

- Greater proportions of overnight visitors to the Maine Woods Area interested in outdoor activities engage in all of the different types measured compared to Maine visitors overall, with the exception of *hiking/climbing/backpacking* and *bicycling*.

Active Outdoor Activities – Non-Water

Base: Those who report outdoor activities as an interest area for this Maine trip



Q31. 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.

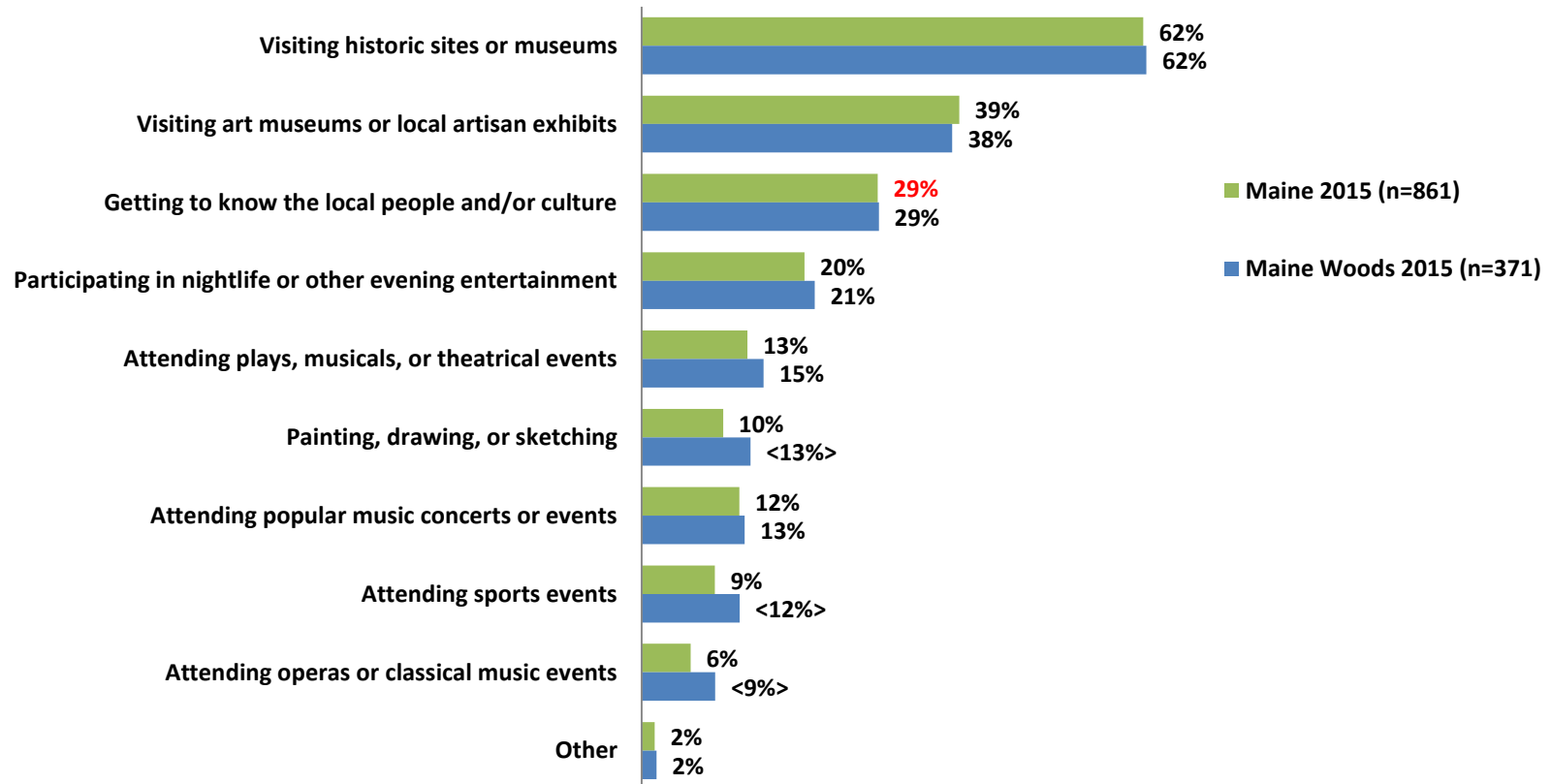
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Two in three Maine Woods overnight visitors interested in history or culture *visit historic sites or museums.*

- While only small proportions of visitors to the Maine Woods Area enjoy *painting/drawing/sketching, sporting events, and opera or classical music activities*, they are still more common among that group as compared to Maine visitors overall.

History or Culture Activities

Base: Those who report history or culture as an interest area for this Maine trip



Q31. 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.

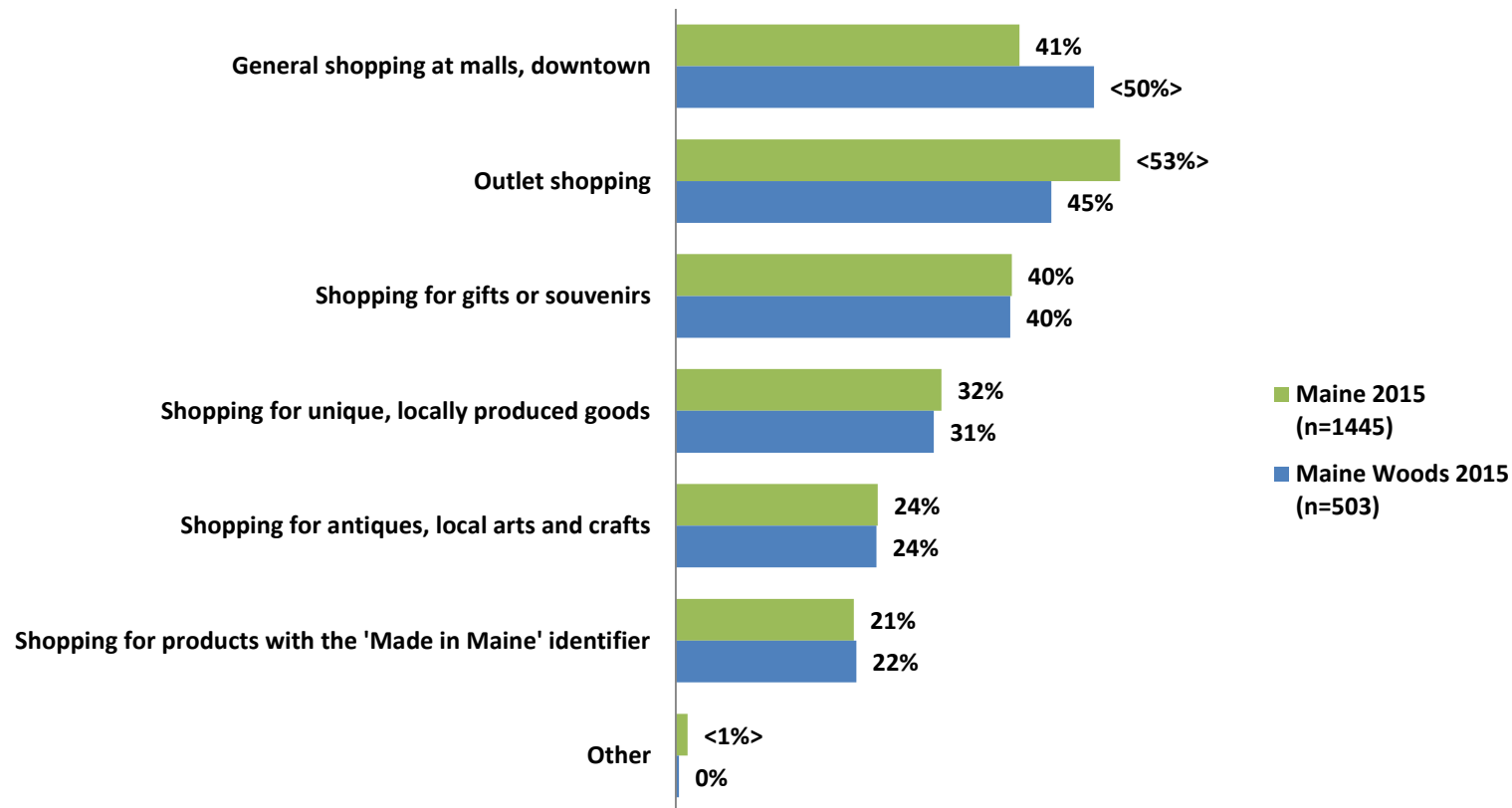
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Half of overnight visitors to the Maine Woods Area who are interested in shopping engage in *general shopping at malls or downtown*.

- A greater proportion of visitors to the Maine Woods *shop at malls/downtown* compared to visitors to the State of Maine overall, while a lesser proportion *shop at outlets*.

Shopping Activities

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



Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

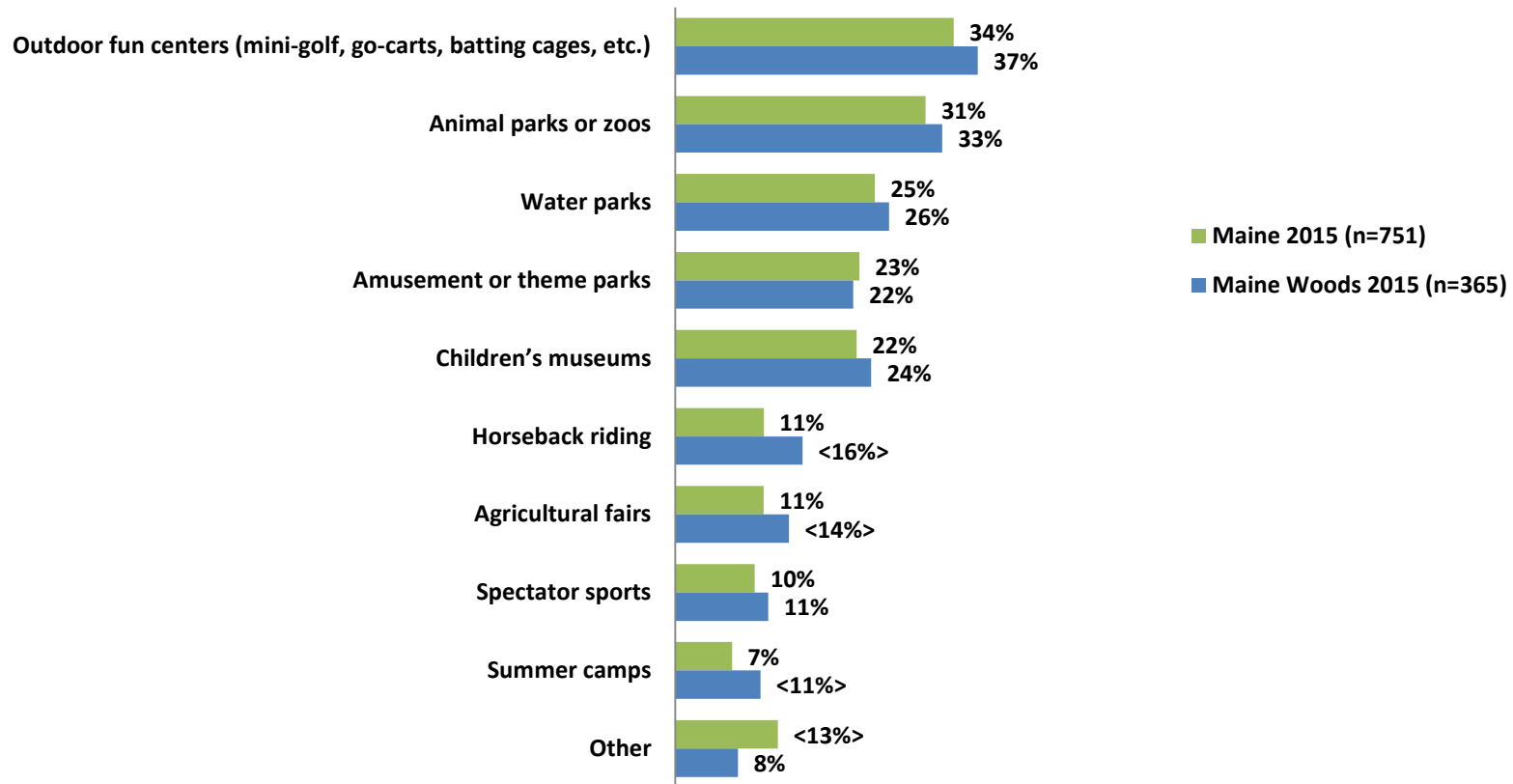
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight visitors to the Maine Woods Area participate in a variety of family fun/children's activities.

- *Horseback riding, agricultural fairs, and summer camps* are more common among Maine Woods visitors interested in family fun or children's activities than among all Maine visitors, although fewer than one out of five participate in either activity.

Family Fun/Children's Activities

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

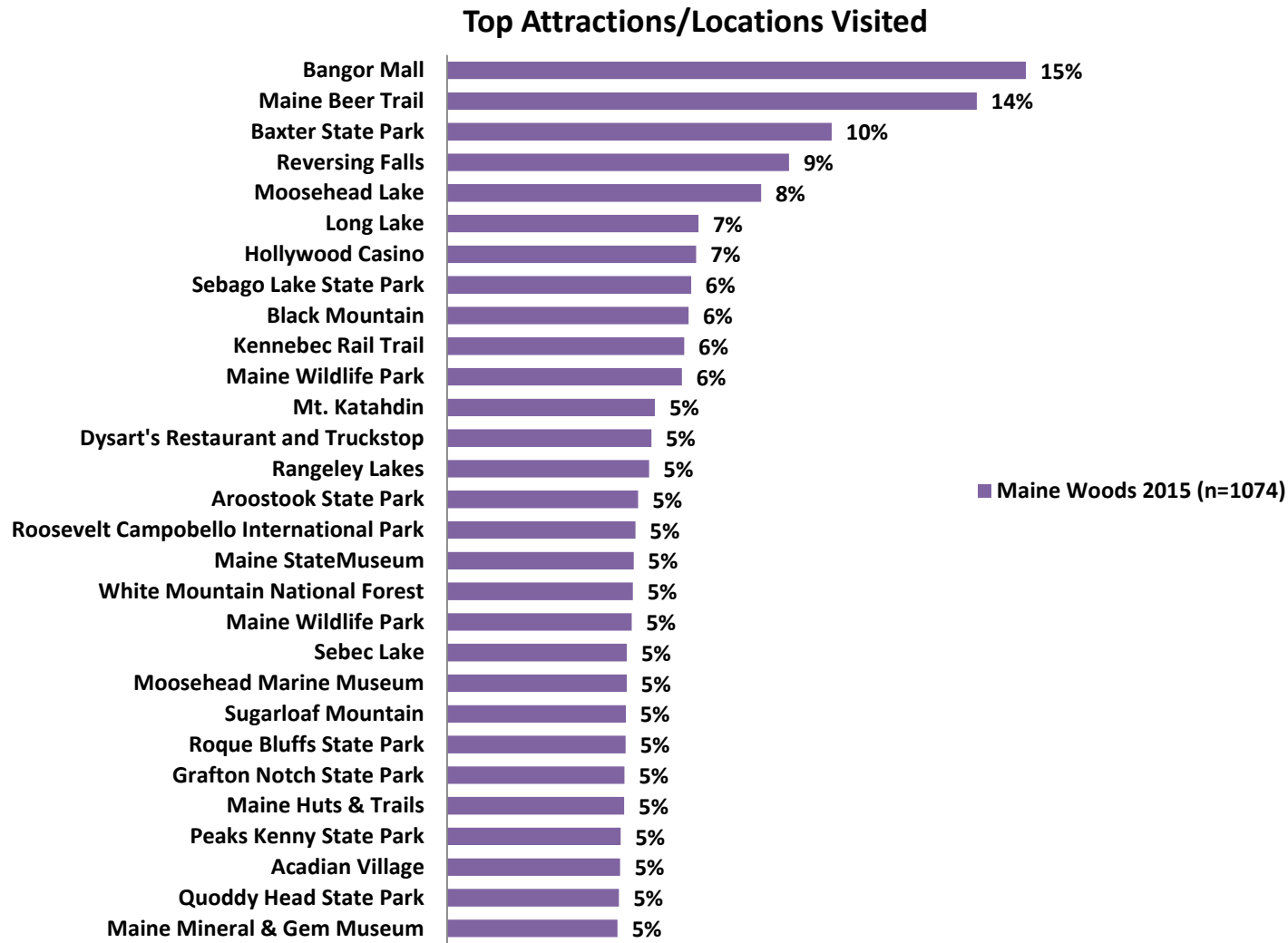


Q31. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

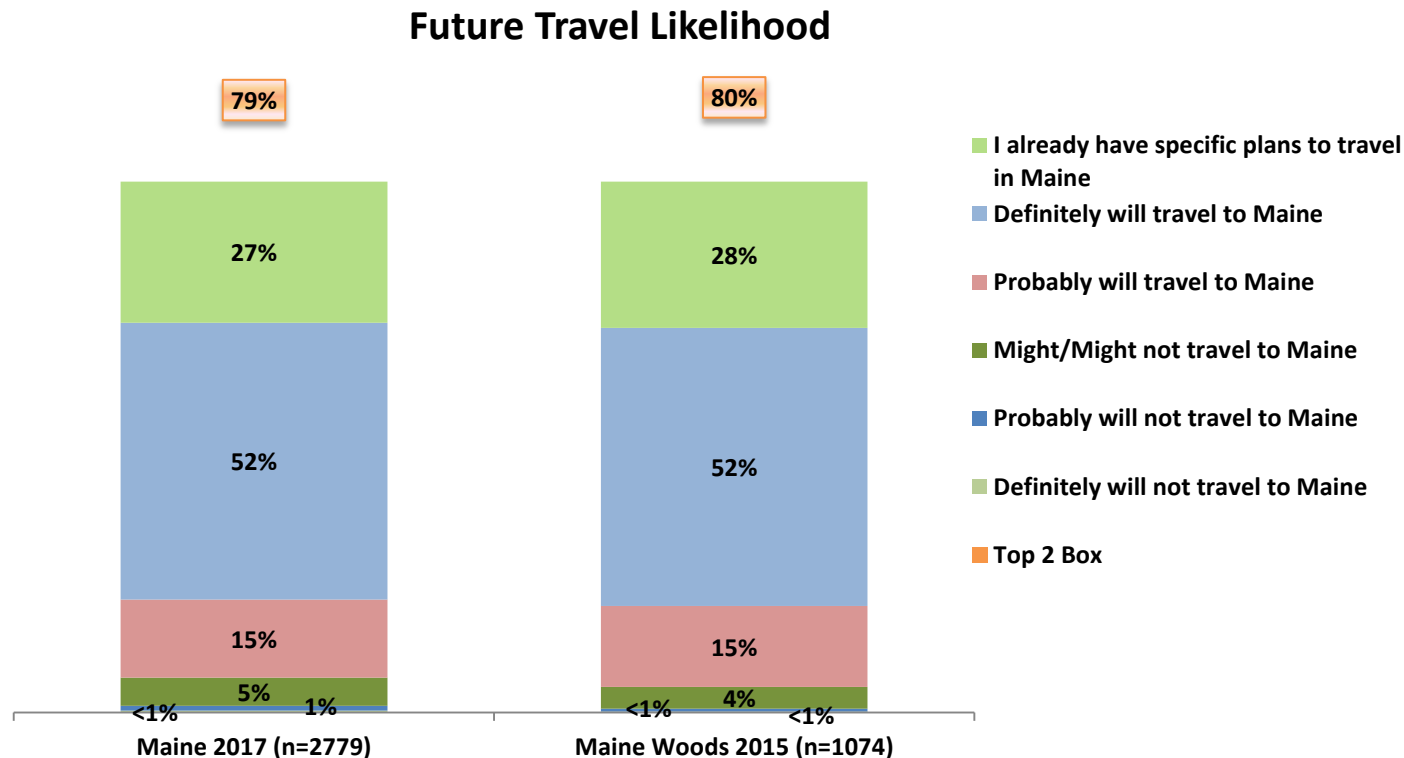
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Out of over 100 Maine Woods attractions/locations listed, the *Bangor Mall* and the *Maine Beer Trail* are the most popular among overnight visitors.



Q26. Within the region(s) you visited, what specific attractions or locations did you visit? Please select all that apply.
Note: Does not include response options selected by fewer than 5% of respondents.

Eight in ten overnight visitors to the Maine Woods Area intend to visit Maine again within the next two years.



Q38. How likely will you be to travel in Maine in the next two years?

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Day Visitors: *Traveler Description*



Day Visitor Demographics

- Day visitors to the Maine Woods Area average 46 years old and earn about \$84,000 annually. Two-thirds have a college degree, and more than half are employed full time.
- Day visitors to the Maine Woods Area trend younger than visitors to the State of Maine as a whole, have lower average household incomes, and are less likely to be married.

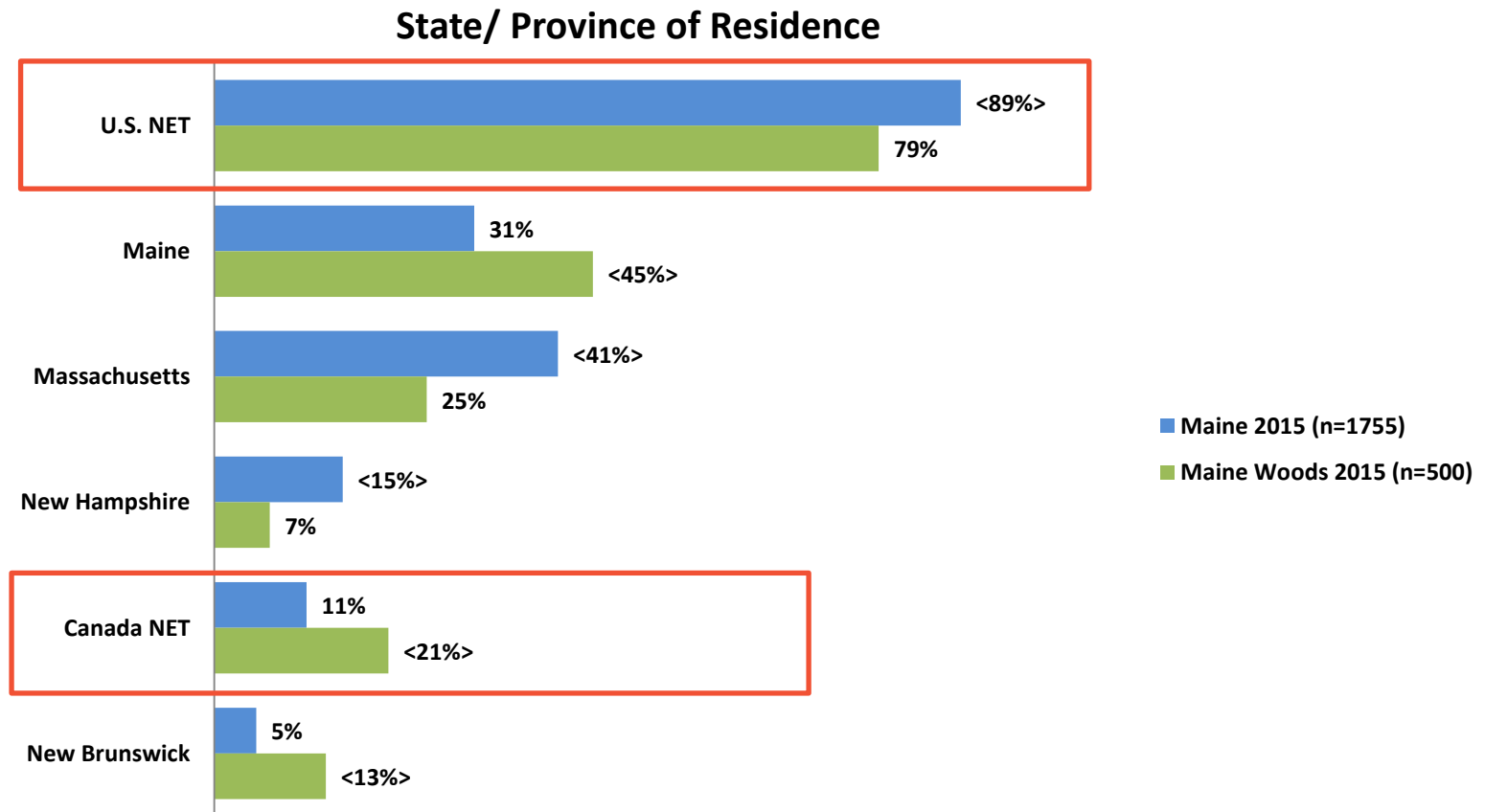
Day Visitors	Maine 2015 (n=1755)	Maine Woods 2015 (n=500)
Age:		
< 35	25%	28%
35 - 44	16%	19%
45 - 54	21%	21%
55 +	<38%>	32%
Mean Age (Years)	<48.0>	45.6
Income:		
< \$50,000	22%	<30%>
\$50,000 - \$99,999	43%	40%
\$100,000 +	<35%>	30%
Mean Income (Thousands)	<\$93,020>	\$83,550
Female	62%	59%
College Degree or Higher	68%	64%
Married	<60%>	55%
Employed Full Time	55%	57%

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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.

Eight in ten day visitors to the Maine Woods Area are from the United States.

- A lesser proportion of Maine Woods day visitors are from the U.S. compared to all day visitors to Maine, while a greater proportion is from Canada.
- Compared to day visitors to the State as a whole, day visitors to the Maine Woods Area are more likely to be from Maine or New Brunswick, and less likely to be from Massachusetts or New Hampshire.



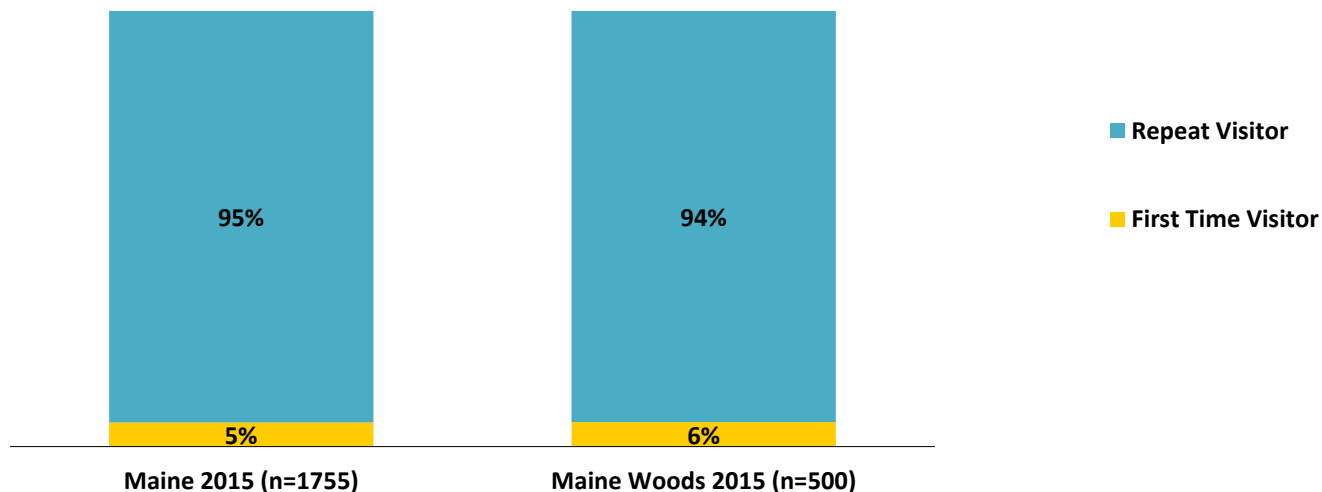
Q2. In what State or Province do you reside?

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Nearly all day visitors to the Maine Woods Area have visited Maine before.

Repeat vs. First Time Visitors



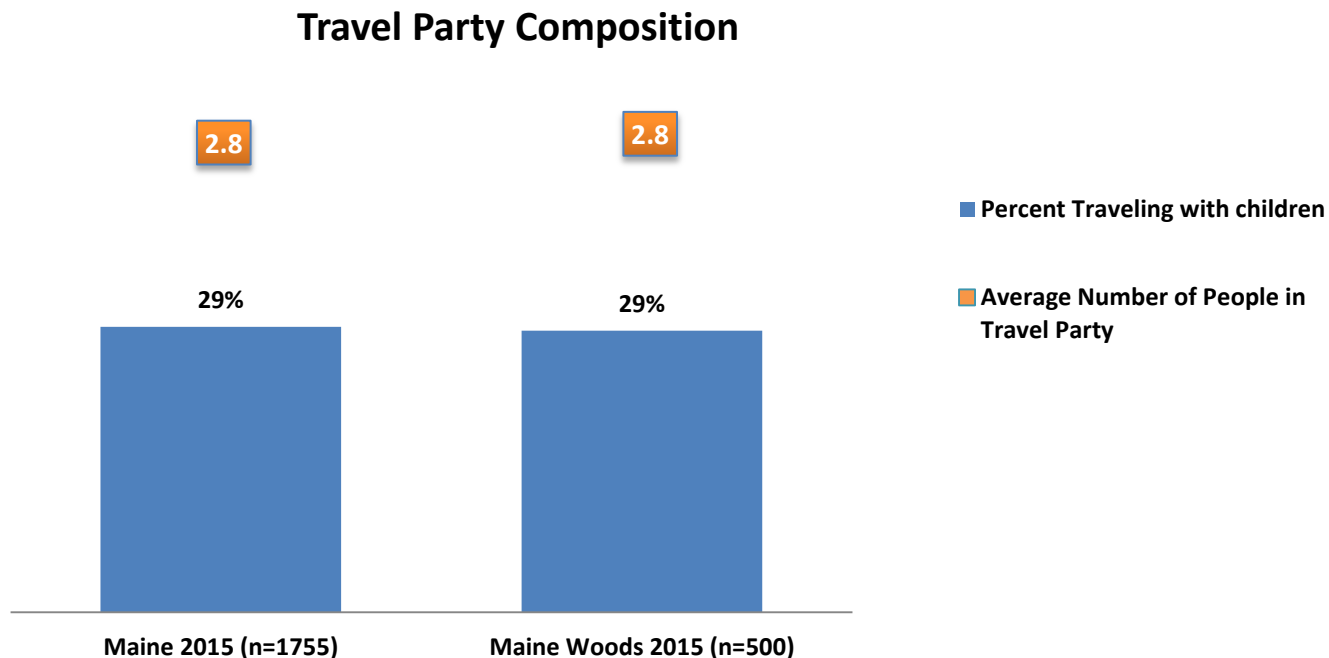
Q10. Was this your first trip to Maine?

Q11. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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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.

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



Q14. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q15. How many of these people were: Children

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

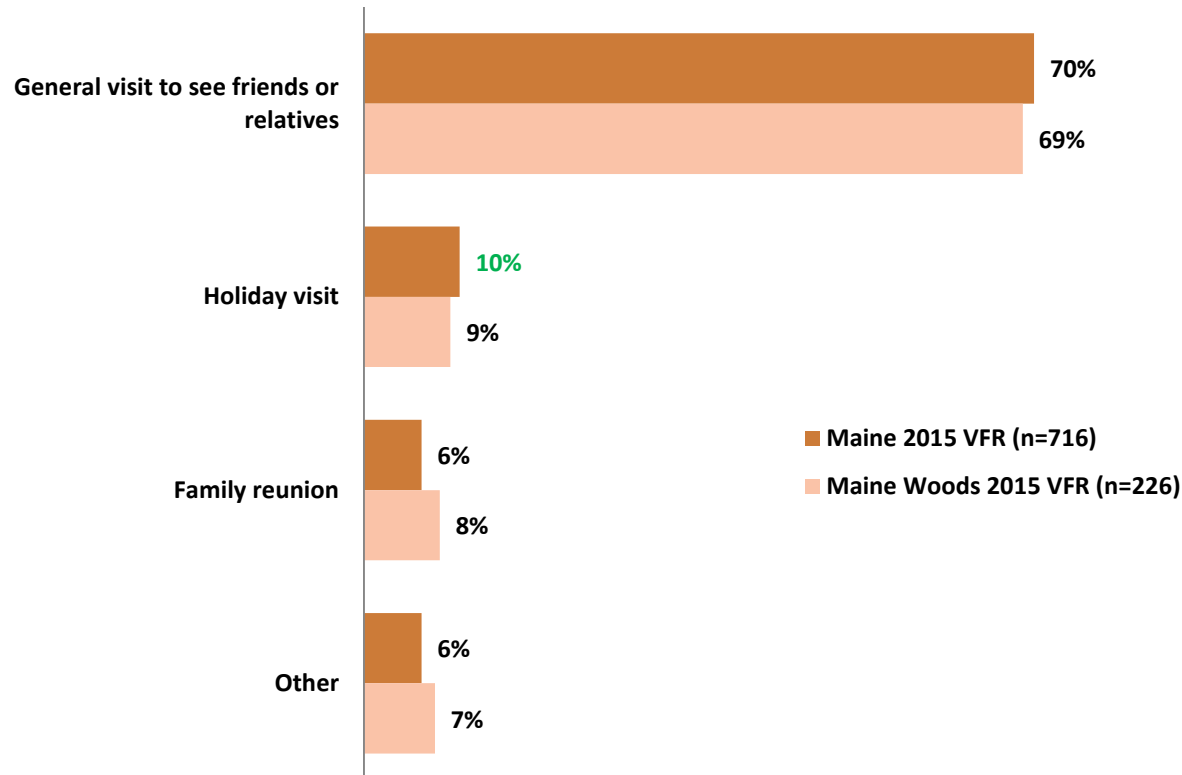
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Two out of three VFR day visitors to the Maine Woods Area cite a *general visit to friends or relatives* as the primary purpose of their VFR trip.

Primary Purpose of Day VFR Trips



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

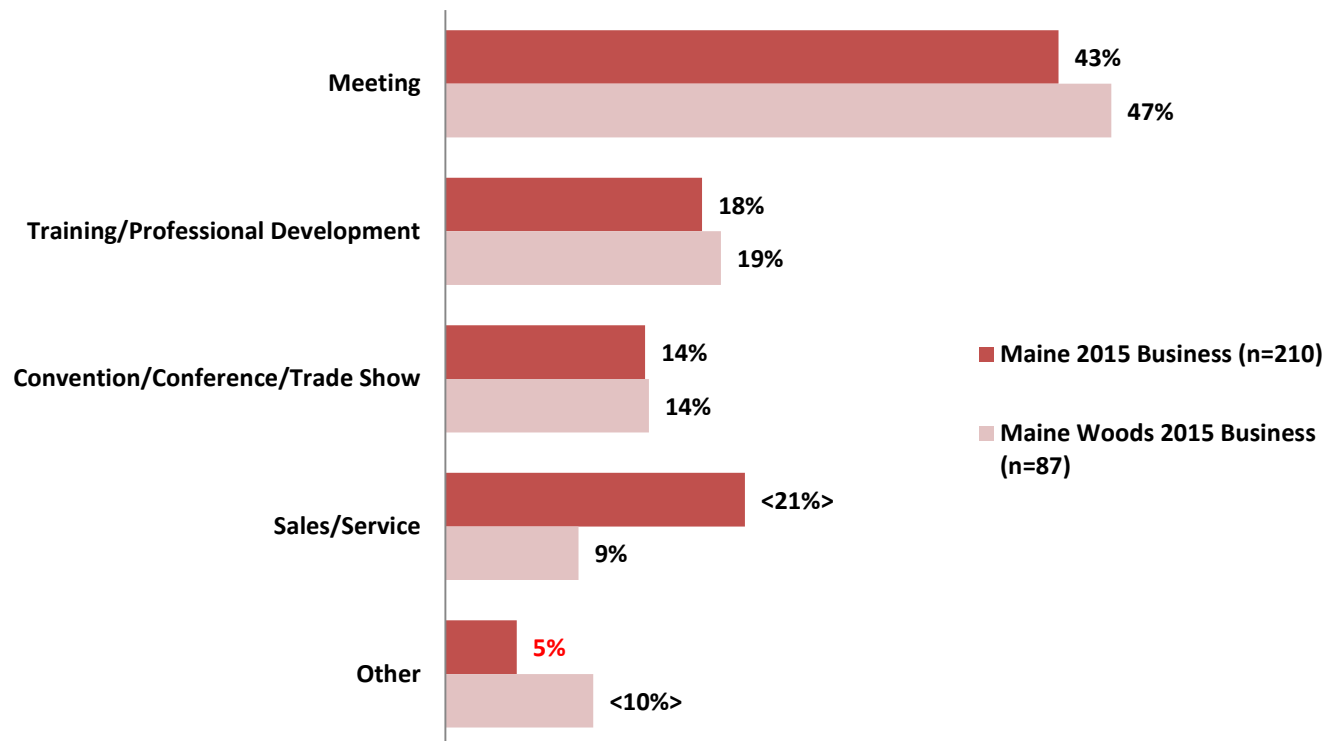
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Among business travelers, *attending a meeting* is the most common reason cited for a day trip to the Maine Woods Area.

- Fewer business day visitors to the Maine Woods travel for *sales or service* compared to all business visitors to Maine.

Primary Purpose of Day Business Trips



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

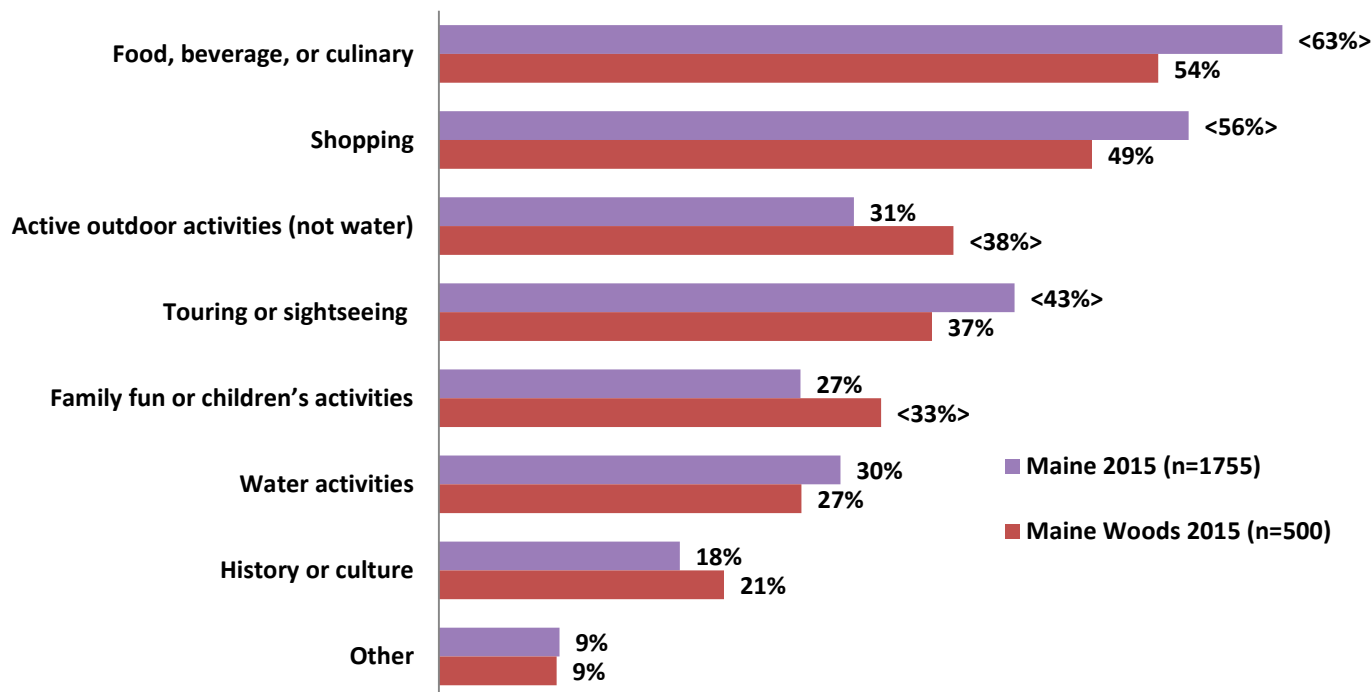
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***Food/beverage/culinary activities* is the most common interest area among day visitors to the Maine Woods Area, followed closely by *shopping*.**

- A lesser proportion of day visitors to the Maine Woods Area are interested in *food/beverage/culinary activities*, *shopping*, and *touring/sightseeing* compared to Maine day visitors overall. Maine Woods day visitors are more likely than Maine day visitors overall to be interested in *active outdoor activities* and *family fun/children's activities*.

2015 Interest Areas



Most Important Interest Area Maine Woods Area

25%

<36%>

<42%>

39%

55%

28%

23%

92%

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

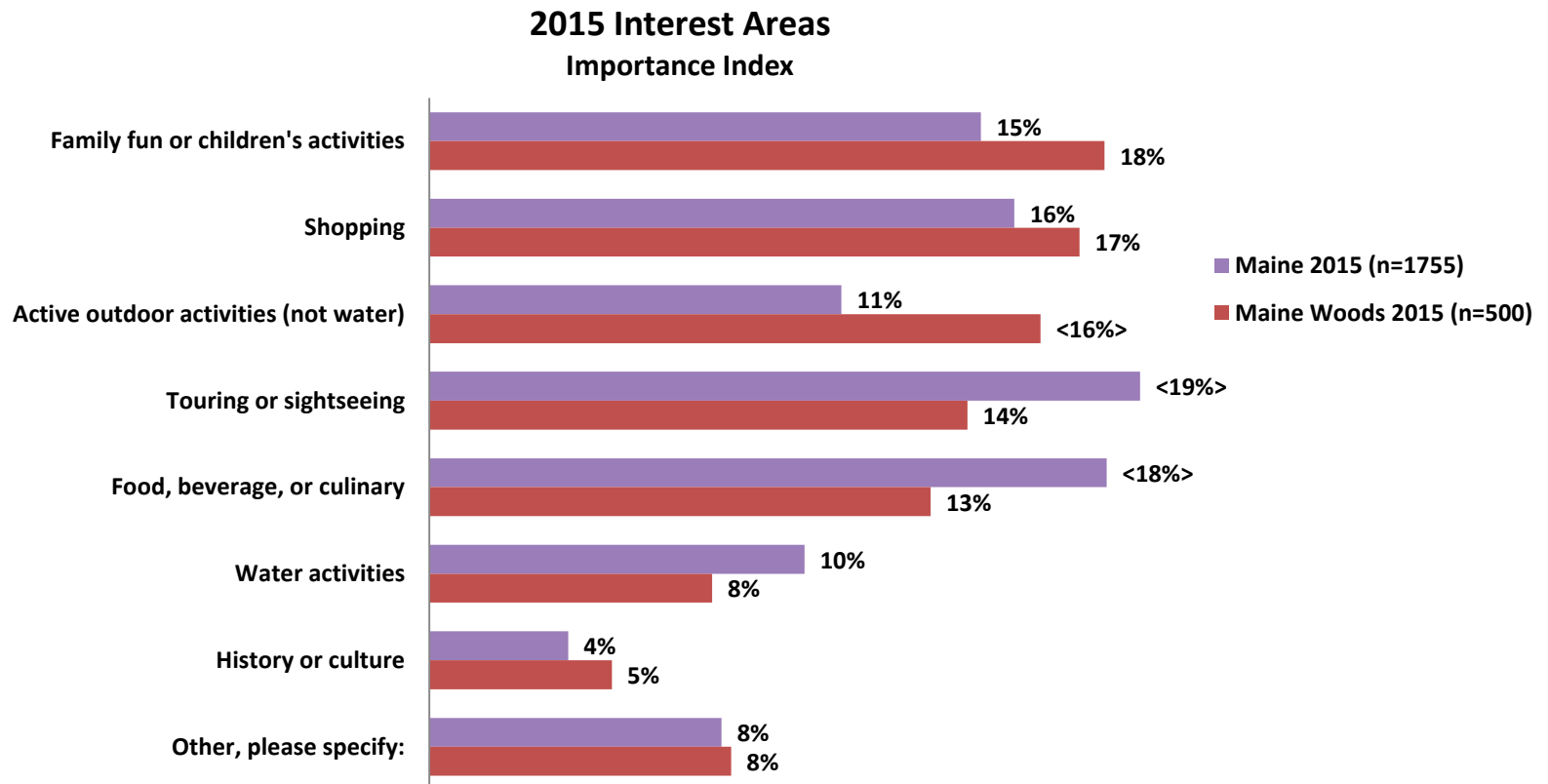
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<> 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.

When analyzing interest and importance in deciding to visit, *family fun/children's activities* ranks highest among Maine Woods day visitors.

- When analyzing the importance index (taking into account both interest and importance), day visitors to the Maine Woods Area are more likely to highly rank *active outdoor activities* than are day visitors to Maine overall. In contrast, they are less likely to rank *touring/sightseeing* and *food/beverage/culinary activities* highly.



Importance Index = percentage selecting category as interest area X percentage ranking same interest area as #1 most important

Q17. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*

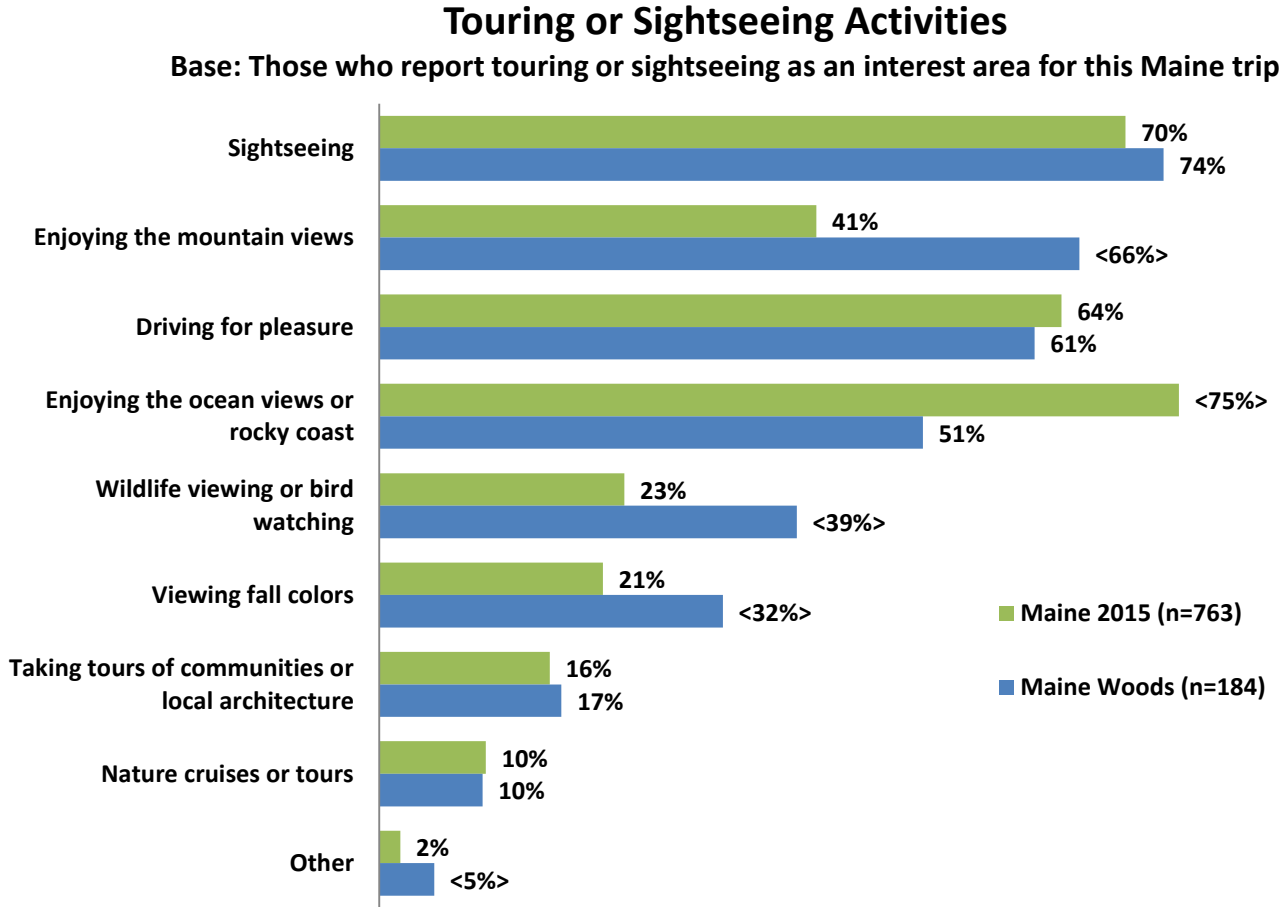
Q18. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.

<> 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.

Among day visitors to the Maine Woods Area who are interested in touring/sightseeing activities, the greatest proportions of visitors spend time *sightseeing* and *enjoying mountain views*.

- Greater proportions of day visitors to the Maine Woods Area *enjoy mountain views, view wildlife/bird watch, and view fall colors* compared to visitors to Maine as a whole.

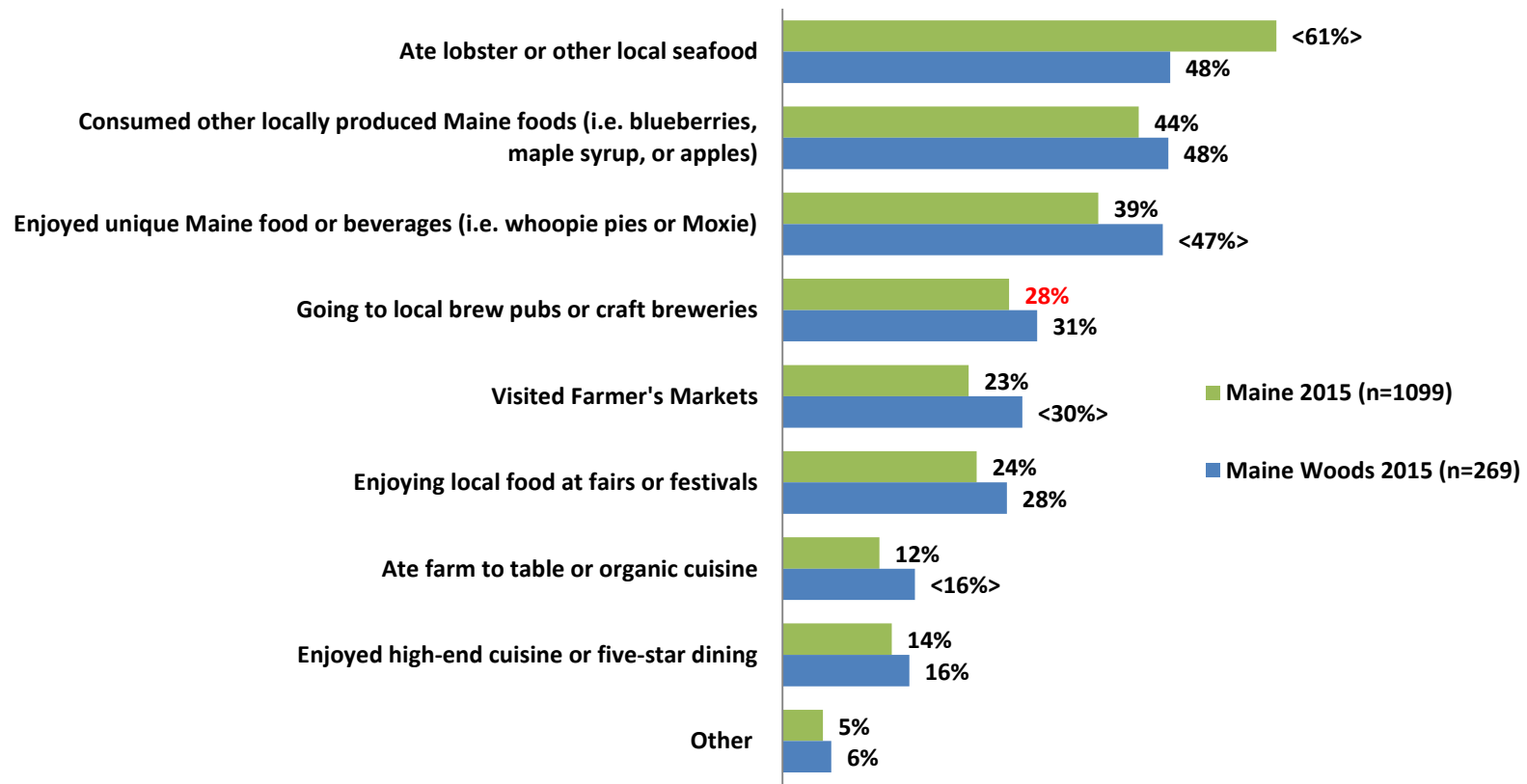


Half of day visitors who are interested in food/beverage/culinary activities ate lobster or local seafood, other locally produced Maine foods, and unique Maine food or beverages while visiting the area.

- There are fewer differences between all Maine day visitors and the Maine Woods subset than among overnight visitors, although more Maine Woods day visitors go to *farmer's markets* and *eat farm to table or organic cuisine*.

Food, Beverage, or Culinary Activities

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



Q19. In which of the following activities did you participate during this trip? Please check all that apply.

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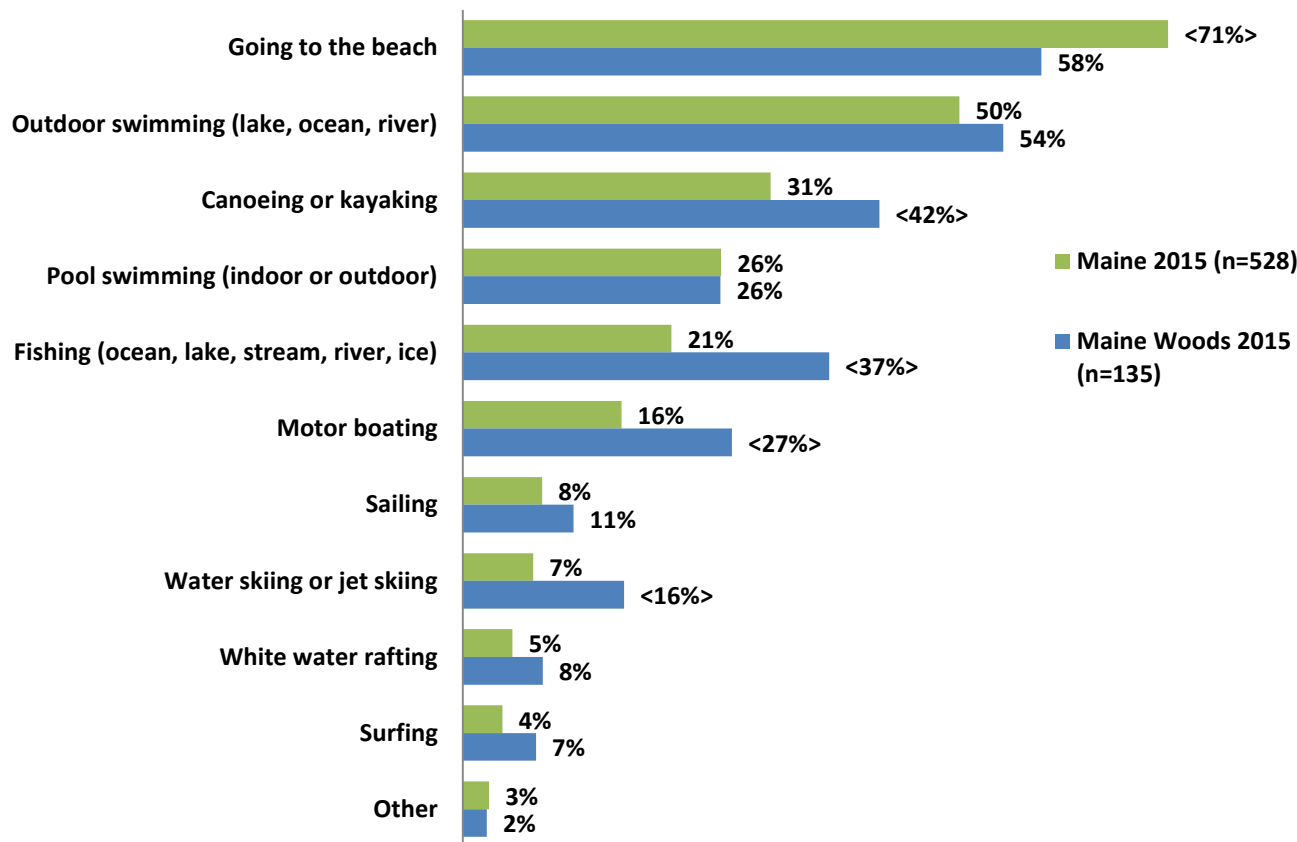
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Over half of day visitors to the Maine Woods Area who are interested in water activities *spent time at the beach and swam outdoors.*

- Water activities such as *canoeing/kayaking, fishing, and motor boating* are more common among Maine Woods day visitors than among day visitors to the State overall.

Water Activities

Base: Those who report water activities as an interest area for this Maine trip



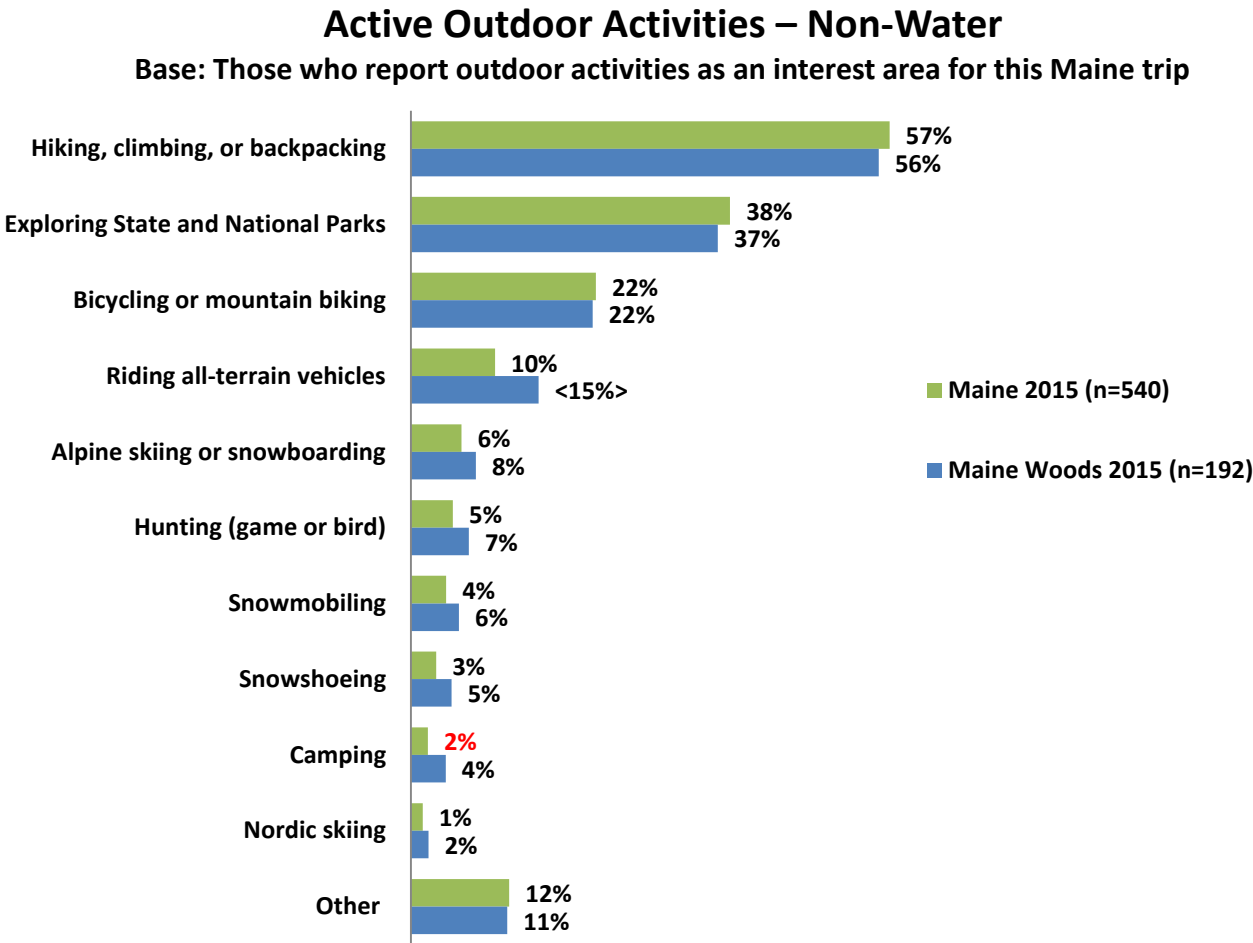
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

Similar to all Maine visitors, the most common non-water active outdoor activity among Maine Woods day visitors is *hiking/climbing/backpacking*.

- A greater proportion of Maine Woods day visitors *ride all-terrain vehicles* compared to day visitors to the State as a whole.

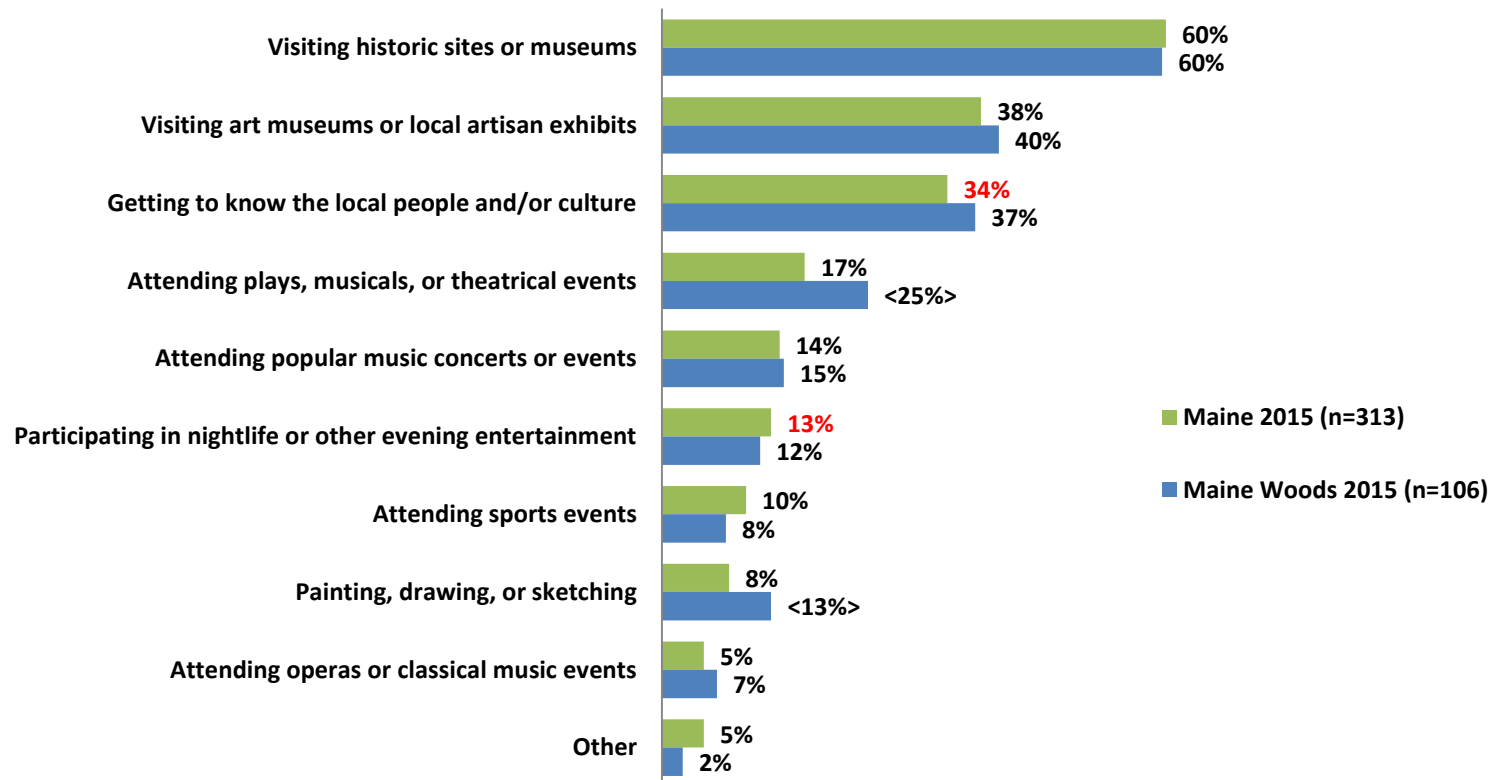


Three out of five day visitors to the Maine Woods Area who are interested in history or culture *visit historic sites or museums.*

- Although participated in by few Maine Woods day visitors overall, *attending plays/musicals/theatrical events* and *painting/drawing/sketching* are more common among Maine Woods day visitors than they are among all Maine day visitors.

History or Culture Activities

Base: Those who report history or culture as an interest area for this Maine trip



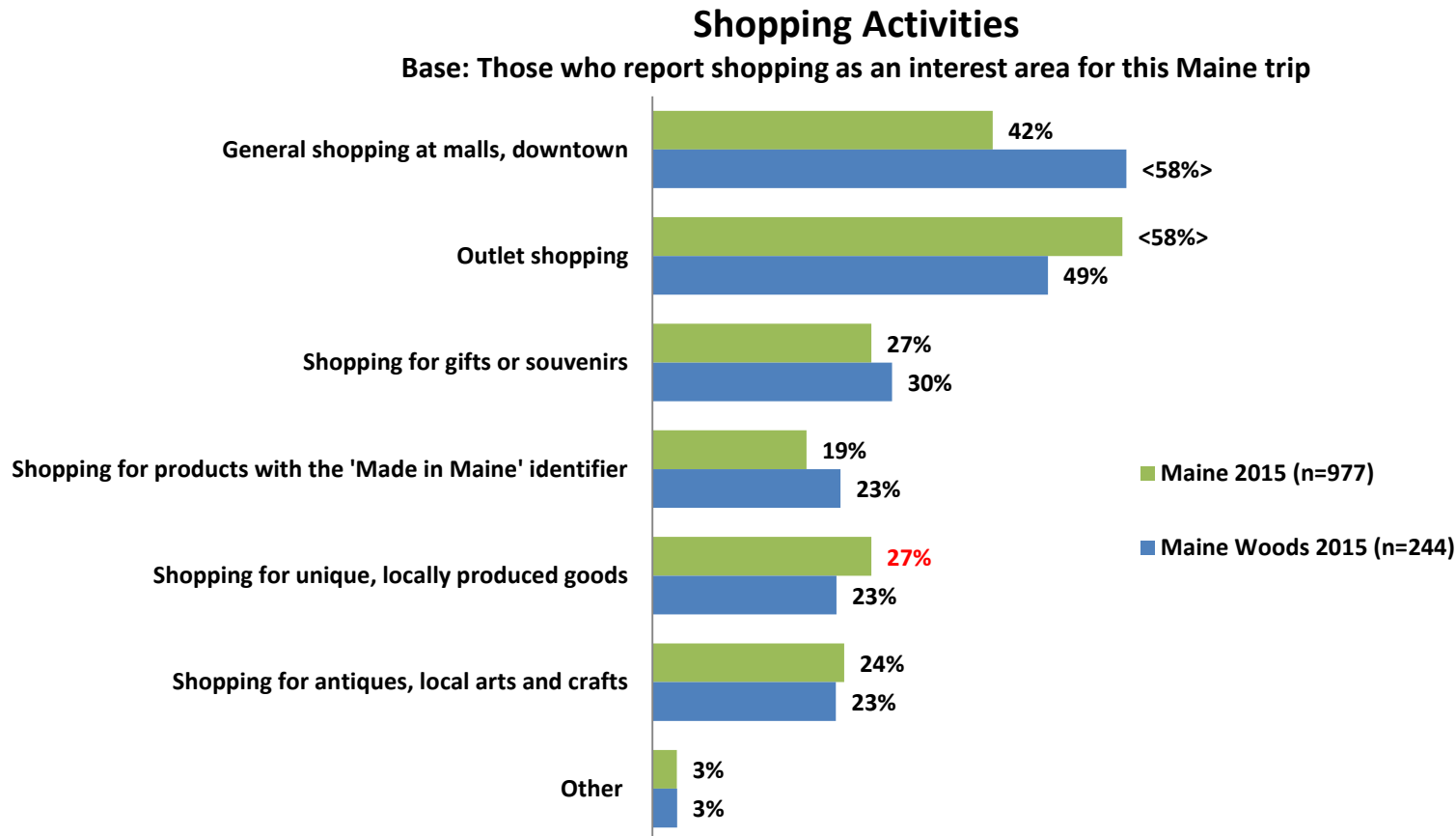
Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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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.

A majority of Maine Woods day visitors who are interested in shopping engage in *general shopping at malls and downtown*.

- General shopping at malls and downtown is more common among day visitors to the Maine Woods region compared to Maine visitors as a whole, while *outlet shopping* is less common among Maine Woods visitors.



Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

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

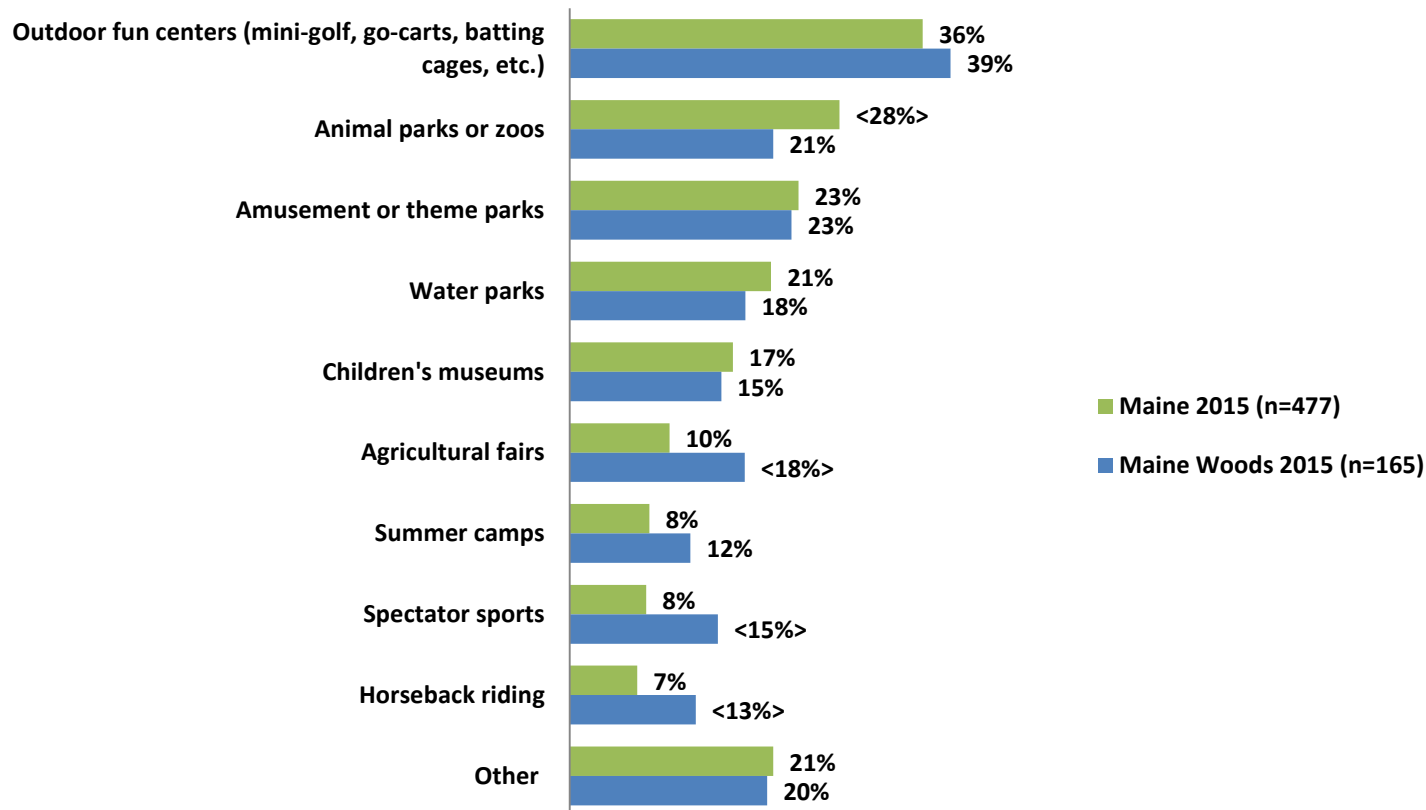
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Maine Woods day visitors who are interested in family fun or children's activities participate in a variety of these activities.

- Although *agricultural fairs, spectator sports, and horseback riding* are participated in by fewer than one in five Maine Woods day visitors, they are more common among that group than among all State visitors.

Family Fun/Children's Activities

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

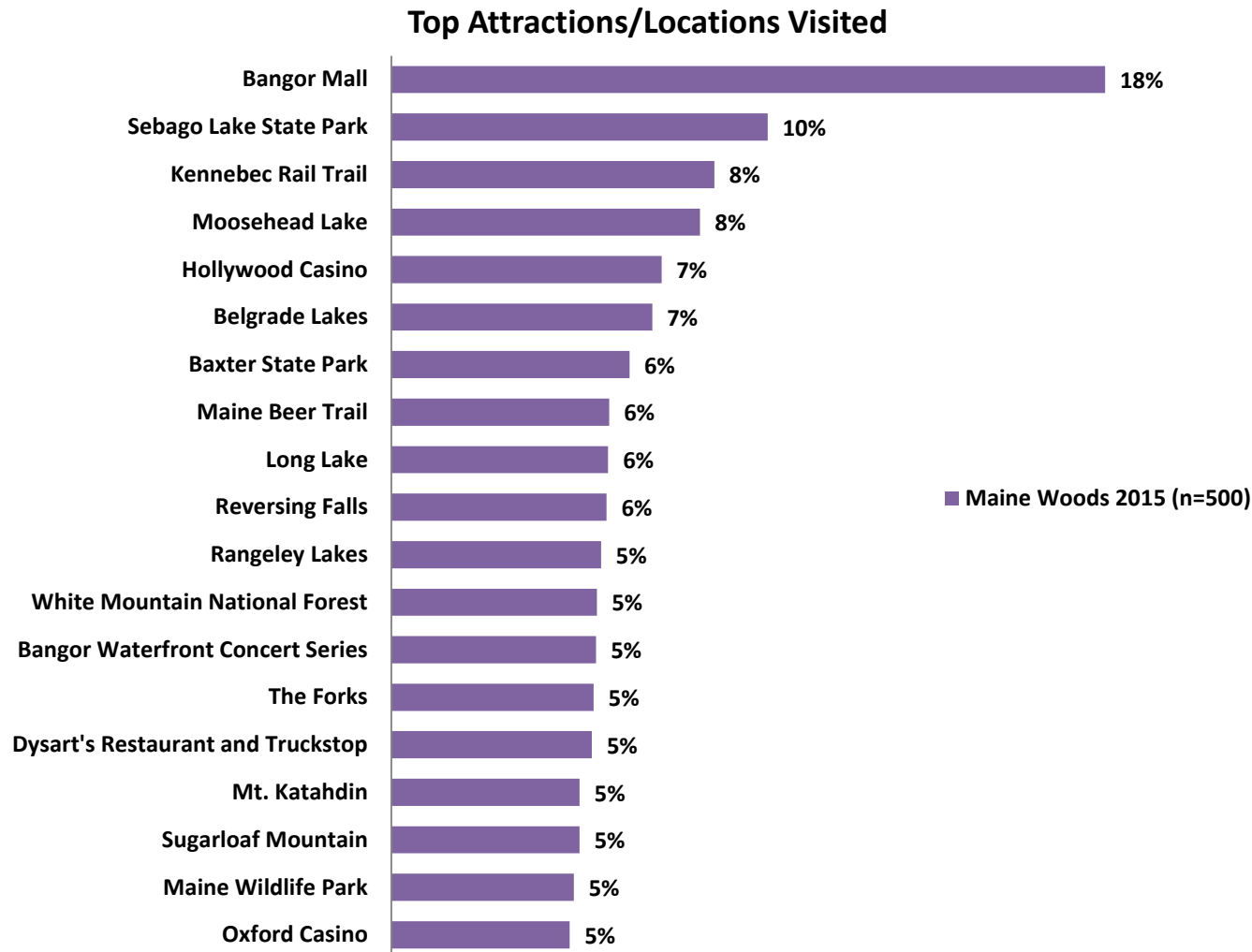


Q19. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> 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.

Out of over 100 Maine Woods attractions/locations listed, the highest proportion of day visitors go to the *Bangor Mall*.



Q23. Within the region(s) you visited, what specific attractions or locations did you visit? Please select all that apply.
Note: Does not include response options selected by fewer than 5% of respondents.

Comparison of Maine Woods Area Visitors to Maine Visitors



Comparisons: Region vs. State

- Visitors to the Maine Woods Area and visitors to the State of Maine overall differ in a number of areas. These variations can be seen in the origin of the visitors, some visitor demographics, and especially in the activities they participate in while visiting.
- Highlights – Maine Woods vs. State visitors:

Visitor Origin

- A **greater proportion** of overnight and day visitors are from **Canada**. More Canadian overnight visitors come from **Ontario** compared to the State overall, while more day visitors originate from **New Brunswick**.
- A **lesser proportion** of overnight visitors come from **New England** compared to all Maine visitors.
- A **greater proportion** of day visitors come from **Maine**, while a **lesser proportion** of day visitors come from Massachusetts and New Hampshire.

Visitor Demographics

- Both overnight and day visitors are **younger** and have **lower household incomes** on average.
- **Fewer** overnight visitors have a college degree and **more** are employed full time.
- **Fewer** day visitors are married.

Comparisons: Region vs. State

- Highlights Continued:

Trip Interest Areas – Overnight and Day Visitors

- **Less** are interested in **food, beverage, or culinary** and **shopping** activities.
- **More** are interested in **active outdoor activities (not water)** and **family fun/children's activities**.

Trip Interest Areas – Overnight Visitors

- **More** are interested in **history/culture** activities.

Trip Interest Areas – Day Visitors

- **Less** are interested in **touring/sightseeing** activities.

Trip Activities – Overnight and Day Visitors

- **Less** likely to:
 - Enjoy the ocean views or rocky coast
 - Eat lobster or other local seafood
 - Go to the beach
 - Go outlet shopping

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight and Day Visitors

- **More** likely to:
 - Enjoy mountain views
 - Go wildlife viewing or bird watching
 - View fall colors
 - Enjoy unique Maine food or beverages (i.e., whoopee pies or Moxie)
 - Visit Farmer's markets
 - Eat farm to table or organic cuisine
 - Go fishing
 - Canoe or kayak
 - Go motor boating
 - Go water skiing or jet skiing
 - Ride all-terrain vehicles
 - Paint, draw, or sketch
 - Shop at malls, downtown
 - Go horseback riding
 - Go to agricultural fairs

Comparisons: Region vs. State

- Highlights Continued:

Trip Activities – Overnight Visitors

- **More likely to:**
 - Attend nature cruises
 - Go to local brew pubs or craft breweries
 - Enjoy local food at fairs or festivals
 - Go sailing
 - Go white water rafting
 - Go surfing
 - Explore State and National Parks
 - Camp
 - Go Nordic skiing
 - Snowmobile
 - Attend sports events
 - Attend operas or classical music events
 - Go to summer camps
 - Go hunting
- **Less likely to:**
 - Drive for pleasure

Trip Activities – Day Visitors

- **More likely to:**
 - Attend plays, musicals, or theatrical events
 - Attend spectator sports
- **Less likely to be:**
 - Go to animal parks or zoos



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