Maine Office of Tourism
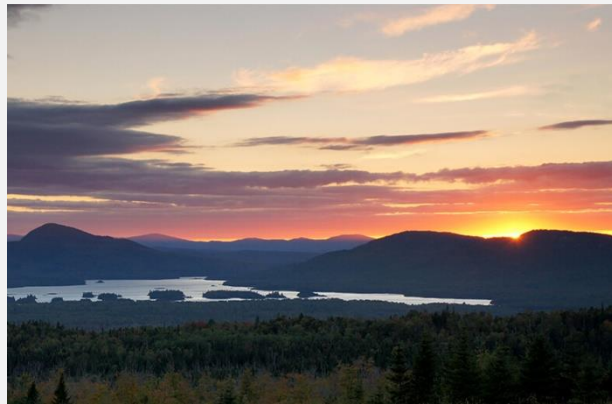# Visitor Tracking Research
2016 Calendar Year Annual Report

Maine Woods Area Special Report

Prepared by

dpa
providing direction
in travel & tourism

June 2017

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Research Objectives and Methodology

Research Objectives and Methodology

Three distinct online surveys are used to accomplish the five primary goals of the State of Maine's visitor tracking research.

Research Objectives	Survey Instruments		
	National Omnibus	**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 devoted to 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 Survey

- 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 Survey

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

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Research Objectives and Methodology

- Survey results were collected during calendar year 2016, for travel to Maine occurring from December 2015 through November 2016. The number of respondents participating in each survey <u>statewide</u> is:

Research Component	2016 Completed Surveys
Overnight Visitor Survey	2,909
Day Visitor Survey	1,762
National Travel Survey	21,910

Research Objectives and Methodology

- The following report summarizes results among visitors to the **Maine Woods Area** during 2016, 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, **1307 overnight visitors** and **577 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 more than would be expected by chance 95 out of 100 times.)*

- Statistically significant differences between 2015 and 2016 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.

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Overnight Visitors:
Traveler Description

Overnight Visitor Demographics

- Overnight visitors to the Maine Woods Area are 40 years old, on average, and have annual household incomes of around $99,000. About two-thirds have a college degree, or are employed full-time.

Overnight Visitors	Maine 2016 (n=2909)	Maine Woods 2016 (n=1307)
Age:		
< 35	34%	<41%>
35 - 44	22%	<25%>
45 - 54	<18%>	16%
55 +	<26%>	19%
Mean Age (Years)	<42.8>	39.9
Income:		
< $50,000	20%	20%
$50,000 - $99,999	42%	41%
$100,000 +	39%	39%
Mean Income	$98,700	$99,100
Female	<60%>	56%
College Degree or Higher	66%	64%
Married	56%	55%
Employed Full-Time	66%	<69%>

<> 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.

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Half of overnight visitors to the Maine Woods Area are from the Mid-Atlantic region of the United States.

- A greater proportion of overnight visitors to the Maine Woods Area originate from the Mid-Atlantic region or Canada, as compared to overnight visitors to the State of Maine overall.

- Overnight visitors to this region are <u>more</u> likely than visitors to the State as a whole to arrive from Pennsylvania or Ontario, and <u>less</u> likely to be from Massachusetts.
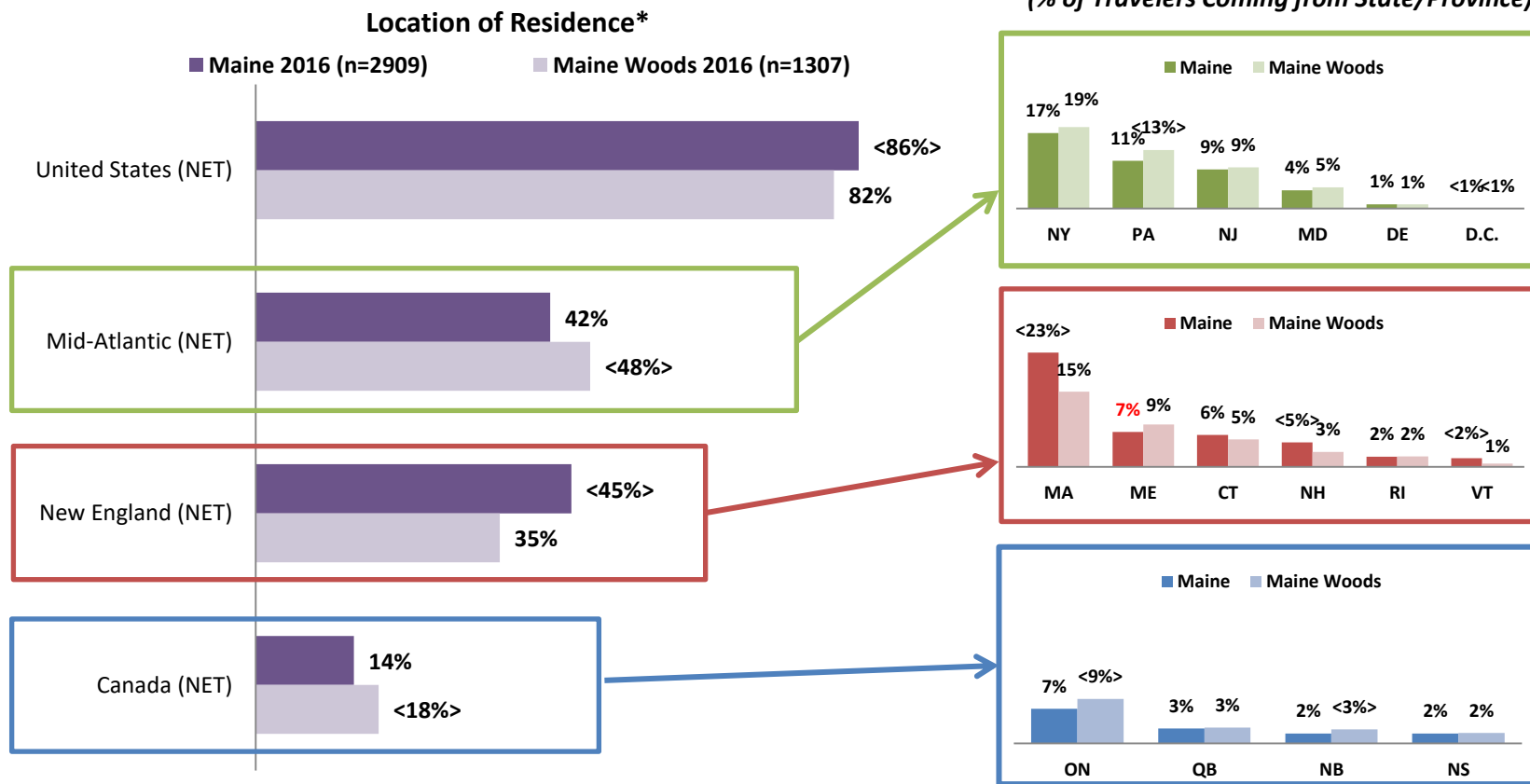
Location of Residence*

■ Maine 2016 (n=2909) ■ Maine Woods 2016 (n=1307)

United States (NET): <86%> / 82%

Mid-Atlantic (NET): 42% / <48%>

New England (NET): <45%> / 35%

Canada (NET): 14% / <18%>

State/Province of Residence
(% of Travelers Coming from State/Province)

■ Maine ■ Maine Woods

	NY	PA	NJ	MD	DE	D.C.
Maine	17%	11%	9%	4%	1%	<1%
Maine Woods	19%	<13%>	9%	5%	1%	<1%

■ Maine ■ Maine Woods

	MA	ME	CT	NH	RI	VT
Maine	<23%>	7%	6%	<5%>	2%	<2%>
Maine Woods	15%	9%	5%	3%	2%	1%

■ Maine ■ Maine Woods

	ON	QB	NB	NS
Maine	7%	3%	2%	2%
Maine Woods	<9%>	3%	<3%>	2%

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Three in ten overnight visitors to the Maine Woods are visiting for the first time.

- The Maine Woods Area attracts a greater proportion of first-time visitors as compared to the State as a whole.

Repeat vs. First-Time Visitors

<77%>	Maine 2016 (n=2909)
23%	
71%	Maine Woods 2016 (n=1307)
<29%>	

■ Repeat Visitor
■ First-Time Visitor

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.

One-third of overnight visitors to the Maine Woods Area are traveling with children.

Travel Party Composition

2.9

3.0

<35%>

33%

■ **Percent Traveling with Children**

■ **Average Number of People in Travel Party**

Maine 2016
(n=2909)

Maine Woods 2016
(n=1307)

Q21. Including yourself, how many people (adults and children) were in your immediate travel party on this specific trip to Maine?
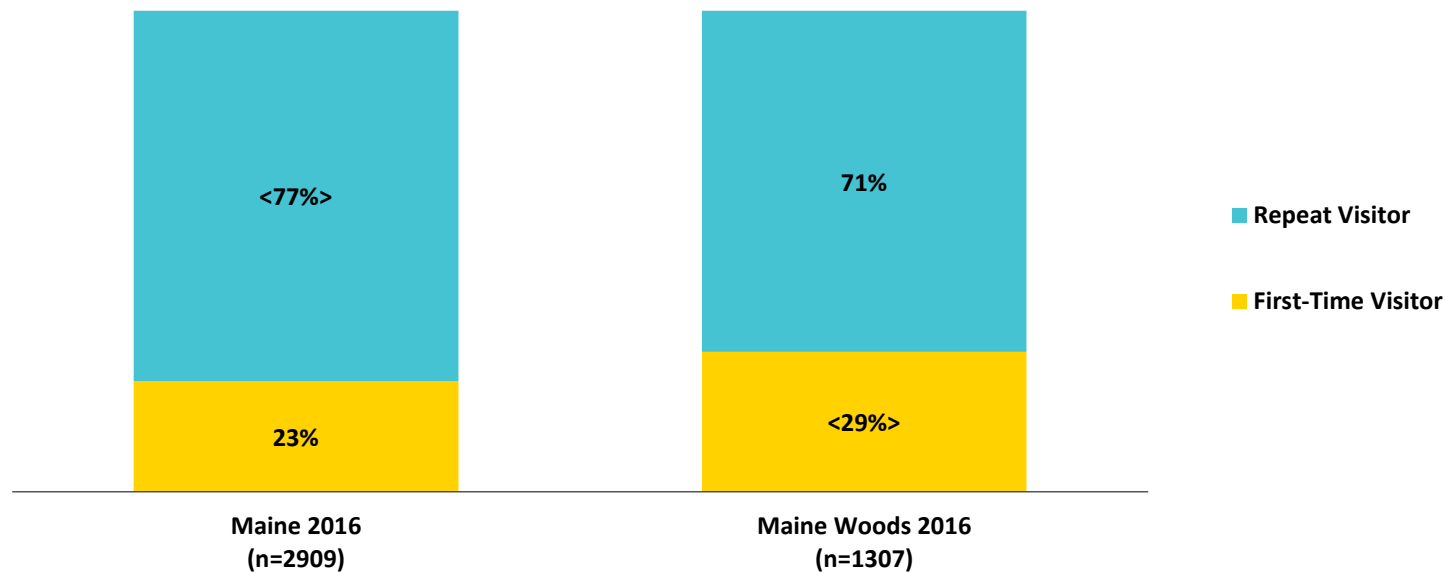Q22. How many of these people were: Children?
<> indicates a significant difference between subgroups at the 95% confidence level.
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Overnight Visitors:
Trip Experience

One-third of overnight business travelers to the Maine Woods are attending a *meeting.*

Primary Purpose of Overnight Business Trips

Meeting	34% / 32%
Training or professional development	23% / 24%
Convention, conference, or trade show	22% / 23%
Sales or service	19% / 19%
Other	2% / 2%

■ Maine 2016 Business (n=524)
■ Maine Woods 2016 Business (n=303)

Q8. What was the primary purpose of your most recent business trip in Maine?
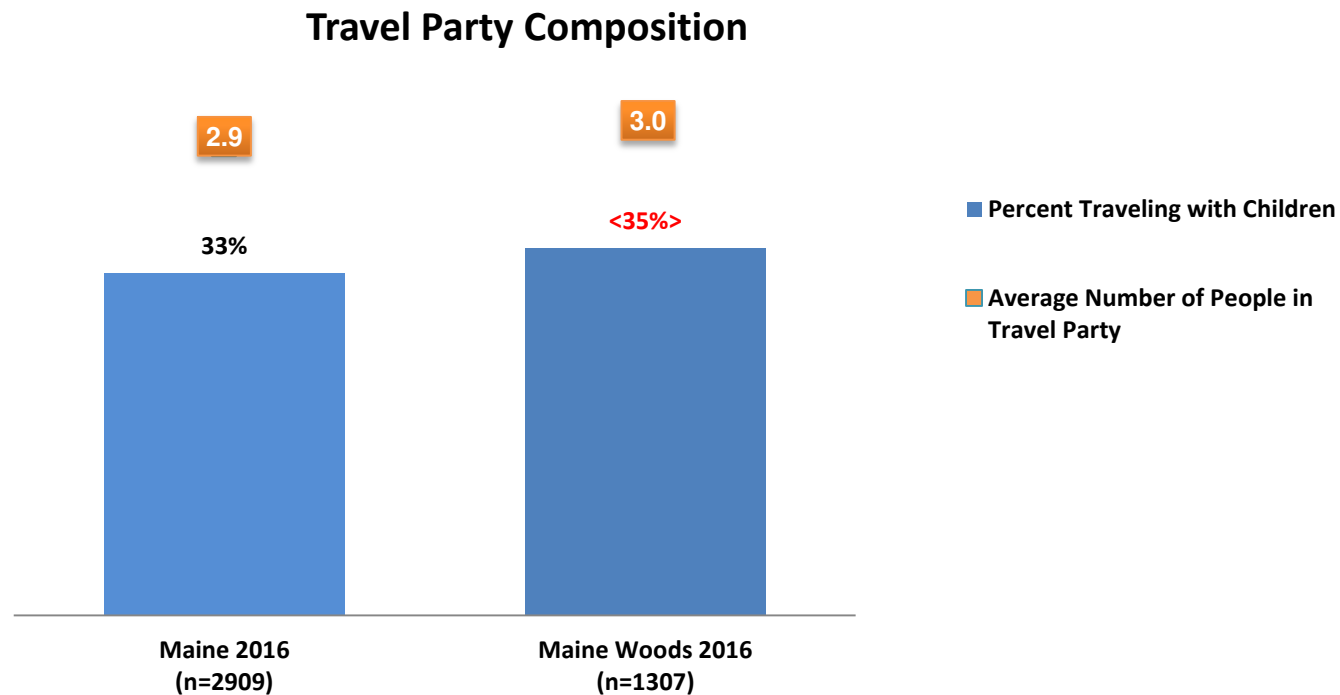<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year

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The majority of overnight VFR visitors cite a *general visit to see friends/relatives* as their reason for visiting the Maine Woods region.

- Maine Woods overnight visitors who are in the state primarily to visit friends or relatives are <u>more</u> likely to be visiting for a *family reunion* than are visitors to the State as a whole. In contrast, these visitors are <u>less</u> likely to be in Maine for a *general visit to see friends or relatives* as compared to visitors to the State as a whole.

Primary Purpose of Overnight VFR Trips

General visit to see friends or relatives
- <61%>
- 56%

Family reunion
- 9%
- <13%>

Holiday visit
- 11%
- 11%

Wedding
- 12%
- 11%

Funeral
- 3%
- 3%

Other
- 5%
- 5%

■ Maine 2016 VFR (n=1168)
■ Maine Woods 2016 VFR (n=562)

Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
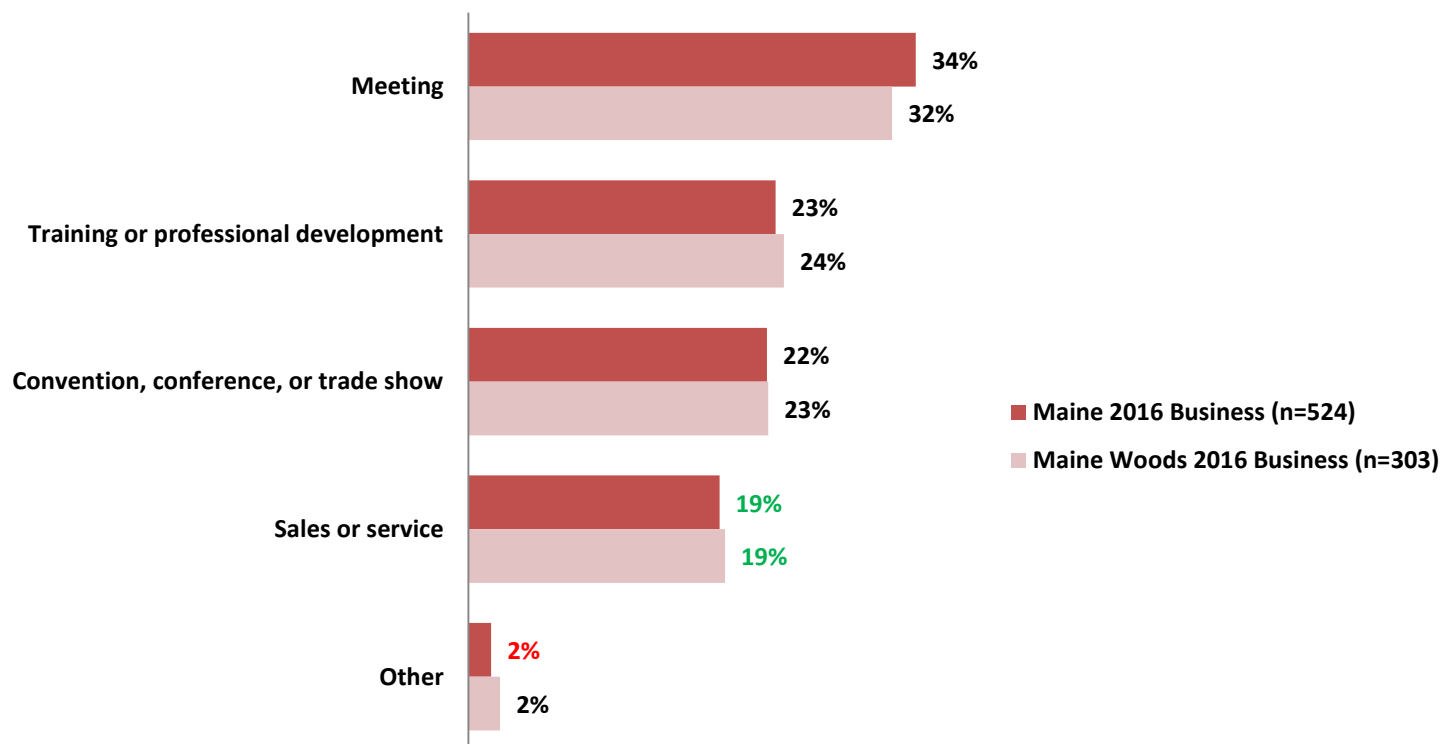<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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The top interest area among overnight visitors to the Maine Woods includes *food/beverage/culinary activities,* followed by *shopping* and *touring/sightseeing*.

- These three top interest areas, however, are <u>less</u> popular among Maine Woods visitors than among visitors to Maine as a whole.
- Overnight visitors to the Maine Woods region are <u>more</u> likely than visitors to the State of Maine as a whole to be interested in *active outdoor activities* and *history/culture activities.*

2016 Interest Areas

Interest Area	Maine 2016 (n=2909)	Maine Woods 2016 (n=1307)
Food, beverage, or culinary	<59%>	56%
Shopping	<51%>	48%
Touring or sightseeing	<48%>	44%
Active outdoor activities (not water)	34%	<38%>
History or culture	30%	<33%>
Family fun or children's activities	29%	30%
Water activities	28%	27%
Other	4%	3%

Most Important Interest Area Maine Woods

Food, beverage, or culinary	34%
Shopping	21%
Touring or sightseeing	55%
Active outdoor activities (not water)	34%
History or culture	27%
Family fun or children's activities	43%
Water activities	33%
Other	96%

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the <u>most important</u>. 15
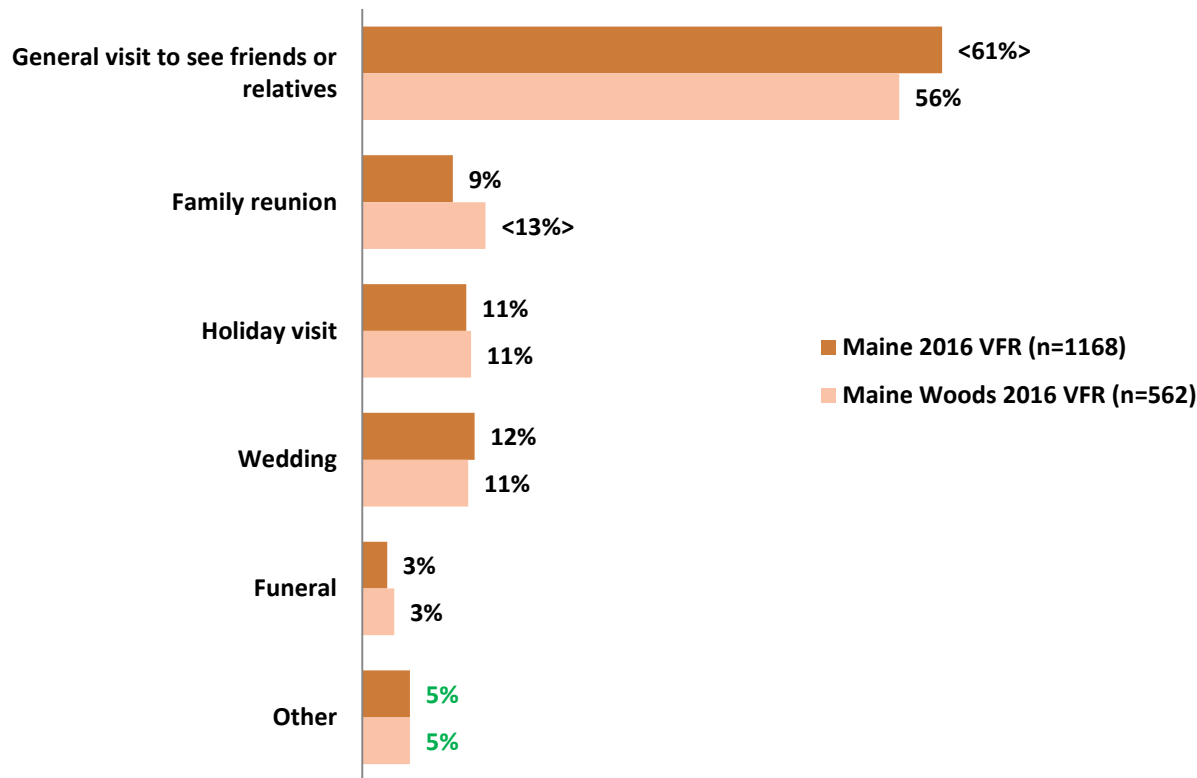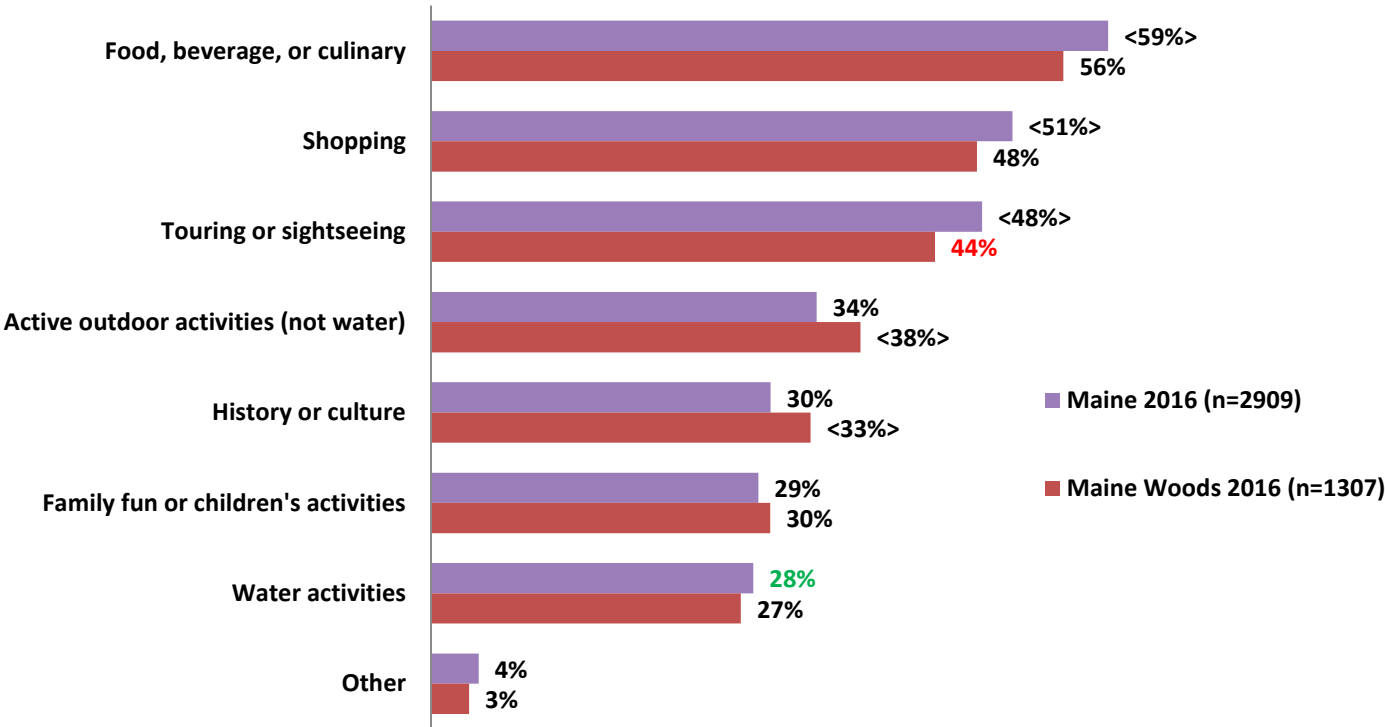<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overall, the primary driver of travel to the region is *touring/sightseeing,* followed by *food/beverage/culinary interests*.

2016 Interest Areas
Travel Driver Index

Interest Area	Maine 2016 (n=2909)	Maine Woods 2016 (n=1307)
Touring or sightseeing	24%	24%
Food, beverage, or culinary	21%	19%
Family fun or children's activities	13%	13%
Active outdoor activities (not water)	11%	13%
Shopping	11%	10%
Water activities	9%	9%
History or culture	8%	9%
Other	4%	3%

■ Maine 2016 (n=2909)

■ Maine Woods 2016 (n=1307)

Travel Driver Index *= percentage selecting category as interest area X percentage ranking same interest area as most important*

Q32. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
Q33. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important.
<> indicates a significant difference between subgroups at the 95% confidence level.
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Two-thirds of visitors interested in touring/sightseeing do some *general sightseeing* or *enjoy the mountain views* while visiting.

- Visitors to the Maine Woods are <u>more</u> likely than overnight visitors to Maine overall to *enjoy the mountain views, view wildlife or birds,* and *view fall colors.*
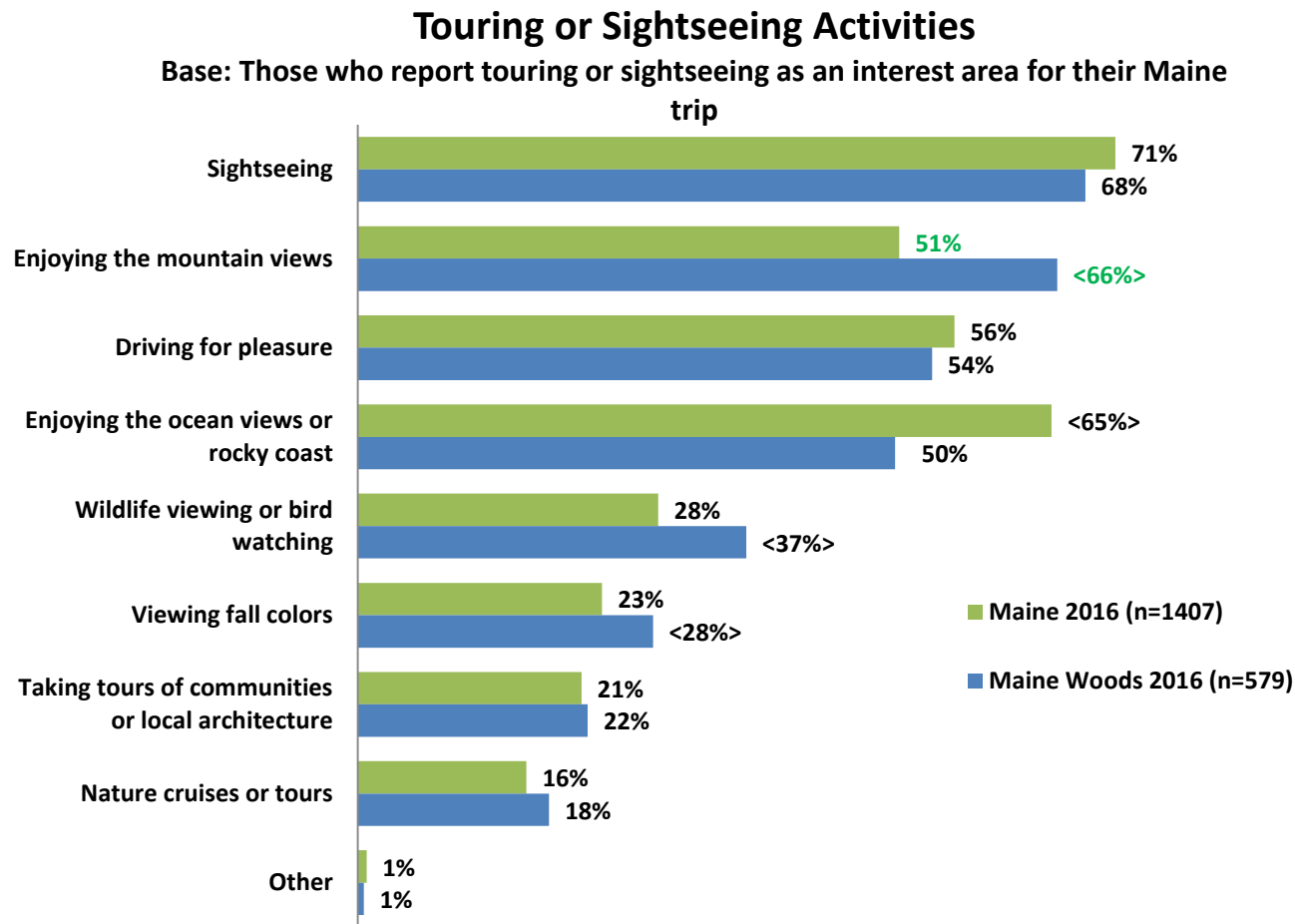
Touring or Sightseeing Activities
Base: Those who report touring or sightseeing as an interest area for their Maine trip

Activity	Maine 2016 (n=1407)	Maine Woods 2016 (n=579)
Sightseeing	71%	68%
Enjoying the mountain views	51%	<66%>
Driving for pleasure	56%	54%
Enjoying the ocean views or rocky coast	<65%>	50%
Wildlife viewing or bird watching	28%	<37%>
Viewing fall colors	23%	<28%>
Taking tours of communities or local architecture	21%	22%
Nature cruises or tours	16%	18%
Other	1%	1%

■ Maine 2016 (n=1407)
■ Maine Woods 2016 (n=579)

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
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Eating lobster/other local seafood is the most common activity among overnight visitors interested in food/beverage/culinary activities.

- Maine Woods visitors are <u>less</u> likely than visitors to the State of Maine as a whole to enjoy Maine's *lobster or seafood*.
- Overnight visitors to the Maine Woods region are <u>more</u> likely to *visit Farmer's Markets* or *enjoy local food at fairs/festivals* than are overnight visitors to Maine as a whole.

Food, Beverage, or Culinary Activities
Base: Those who report food, beverage, or culinary as an interest area for their Maine trip

Activity	Maine 2016 (n=1729)	Maine Woods 2016 (n=726)
Ate lobster or other local seafood	<62%>	52%
Enjoyed unique Maine food or beverages (i.e. whoopie pies or Moxie)	40%	42%
Consumed other locally produced Maine foods (i.e. blueberries, maple syrup, or apples)	42%	40%
Visited Farmer's Markets	28%	<34%>
Going to local brew pubs or craft breweries	36%	33%
Enjoying local food at fairs or festivals	27%	<31%>
Enjoyed high-end cuisine or five-star dining	20%	19%
Ate farm to table or organic cuisine	18%	18%

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
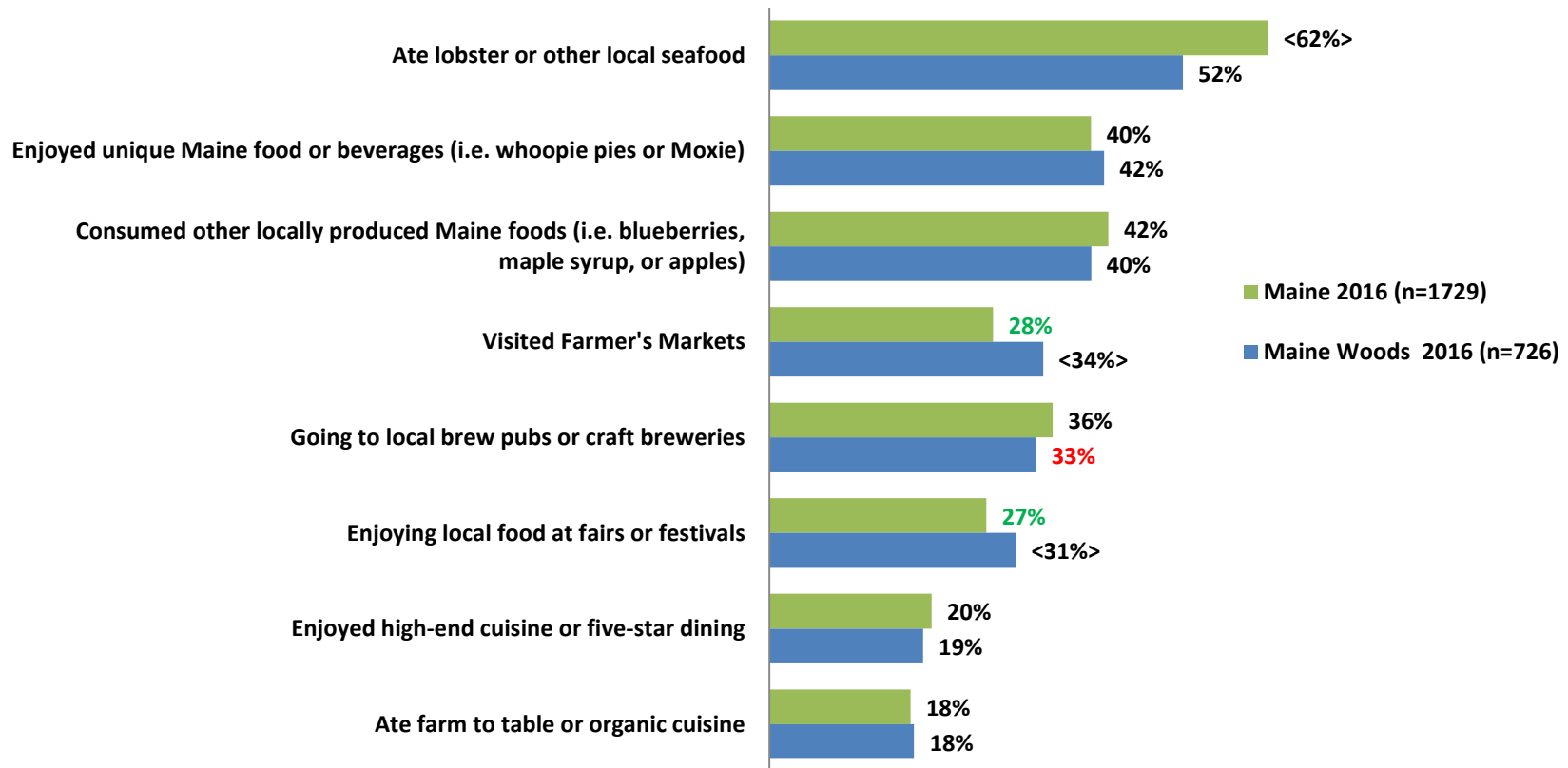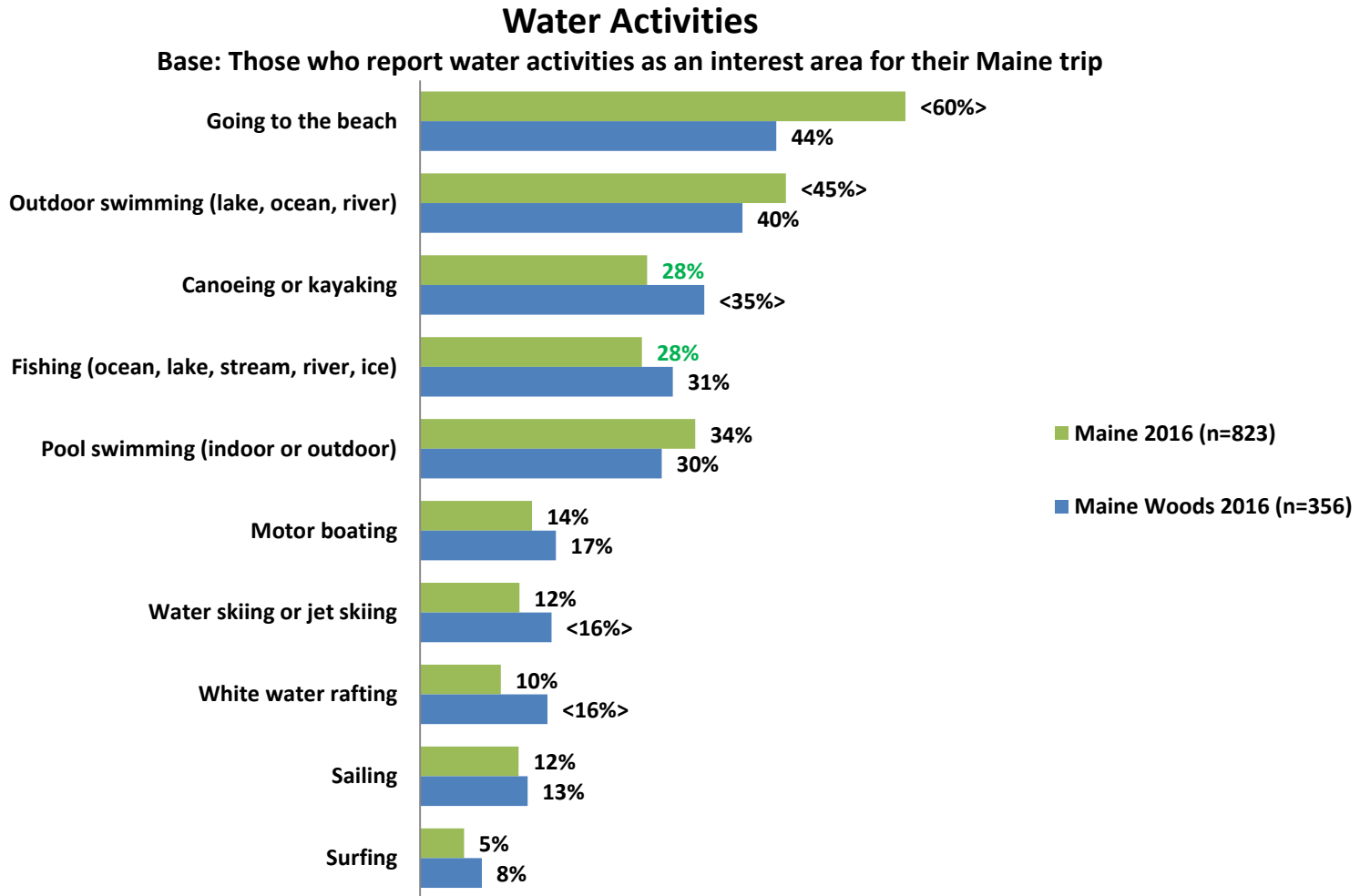<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Going to the beach and *outdoor swimming* are the most common water activities pursued by overnight visitors to the Maine Woods Area, though less so than among Maine visitors as a whole.

- *Canoeing or kayaking, water skiing,* and *white water rafting* are more popular among overnight visitors to the Maine Woods Area than among visitors to the State as a whole.

Water Activities
Base: Those who report water activities as an interest area for their Maine trip

Activity	Maine 2016 (n=823)	Maine Woods 2016 (n=356)
Going to the beach	<60%>	44%
Outdoor swimming (lake, ocean, river)	<45%>	40%
Canoeing or kayaking	28%	<35%>
Fishing (ocean, lake, stream, river, ice)	28%	31%
Pool swimming (indoor or outdoor)	34%	30%
Motor boating	14%	17%
Water skiing or jet skiing	12%	<16%>
White water rafting	10%	<16%>
Sailing	12%	13%
Surfing	5%	8%

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
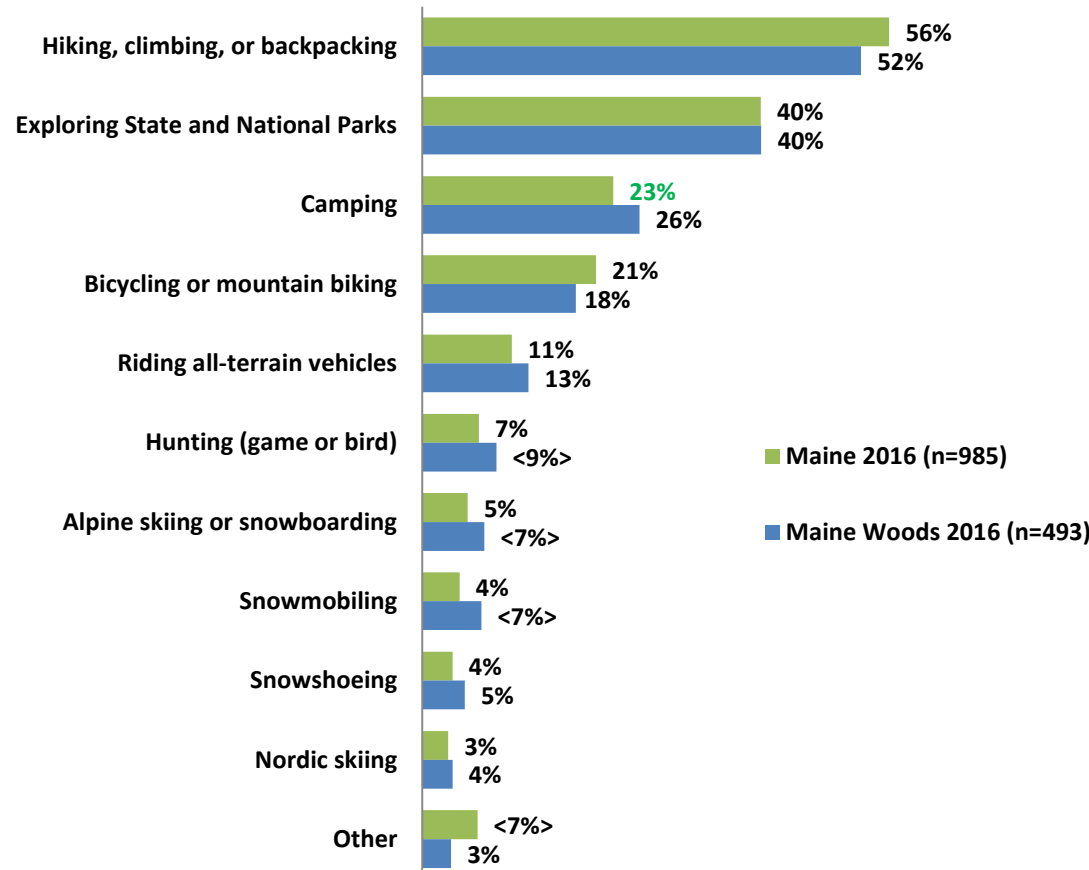<> indicates a significant difference between subgroups at the 95% confidence level.
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The most common active outdoor activity among overnight visitors to the Maine Woods is *hiking/climbing/backpacking,* followed by *exploring State and National Parks.*

- *Hunting, skiing,* and *snowmobiling* are all <u>more</u> popular among overnight visitors to the Maine Woods Area than among visitors 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

Activity	Maine 2016 (n=985)	Maine Woods 2016 (n=493)
Hiking, climbing, or backpacking	56%	52%
Exploring State and National Parks	40%	40%
Camping	23%	26%
Bicycling or mountain biking	21%	18%
Riding all-terrain vehicles	11%	13%
Hunting (game or bird)	7%	<9%>
Alpine skiing or snowboarding	5%	<7%>
Snowmobiling	4%	<7%>
Snowshoeing	4%	5%
Nordic skiing	3%	4%
Other	<7%>	3%

■ Maine 2016 (n=985)

■ Maine Woods 2016 (n=493)

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
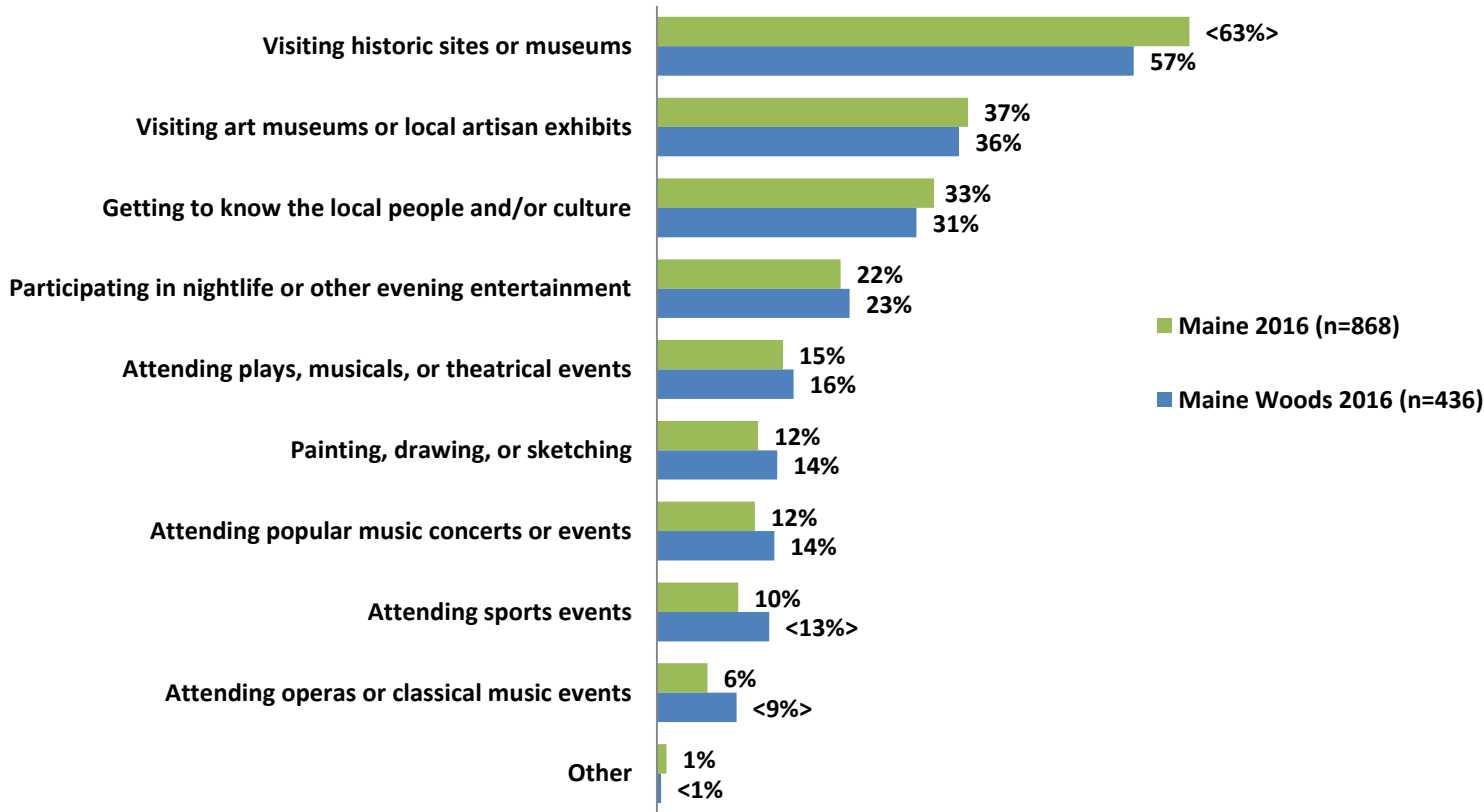<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Visiting historic sites/museums **is the most popular activity among overnight visitors who are interested in history/culture, though less so than among visitors to the State as a whole.**

History or Culture Activities
Base: Those who report history or culture as an interest area for their Maine trip

Activity	Maine 2016 (n=868)	Maine Woods 2016 (n=436)
Visiting historic sites or museums	<63%>	57%
Visiting art museums or local artisan exhibits	37%	36%
Getting to know the local people and/or culture	33%	31%
Participating in nightlife or other evening entertainment	22%	23%
Attending plays, musicals, or theatrical events	15%	16%
Painting, drawing, or sketching	12%	14%
Attending popular music concerts or events	12%	14%
Attending sports events	10%	<13%>
Attending operas or classical music events	6%	<9%>
Other	1%	<1%

Q34. 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.
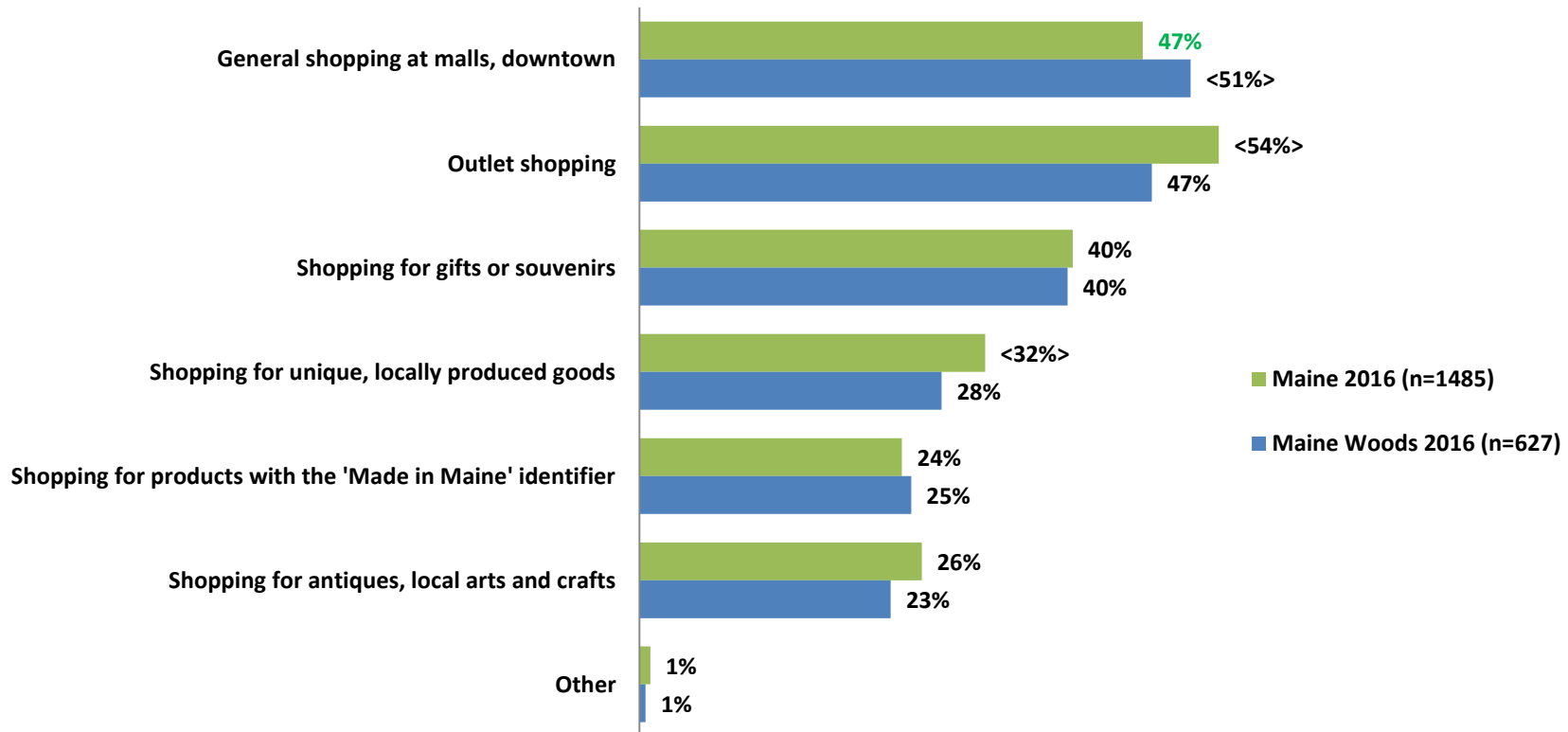
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Overnight visitors to the Maine Woods who are interested in shopping engage in various shopping activities while visiting.

- *General shopping at malls or downtown* is <u>more</u> popular in the Maine Woods area compared to the State as a whole, while *outlet shopping* and *shopping for unique, locally produced goods* are <u>less</u> popular.

Shopping Activities
Base: Those who report shopping as an interest area for their Maine trip

Activity	Maine 2016 (n=1485)	Maine Woods 2016 (n=627)
General shopping at malls, downtown	47%	<51%>
Outlet shopping	<54%>	47%
Shopping for gifts or souvenirs	40%	40%
Shopping for unique, locally produced goods	<32%>	28%
Shopping for products with the 'Made in Maine' identifier	24%	25%
Shopping for antiques, local arts and crafts	26%	23%
Other	1%	1%

Q34. In which of the following activities did you participate during this trip? *Please check all that apply*.
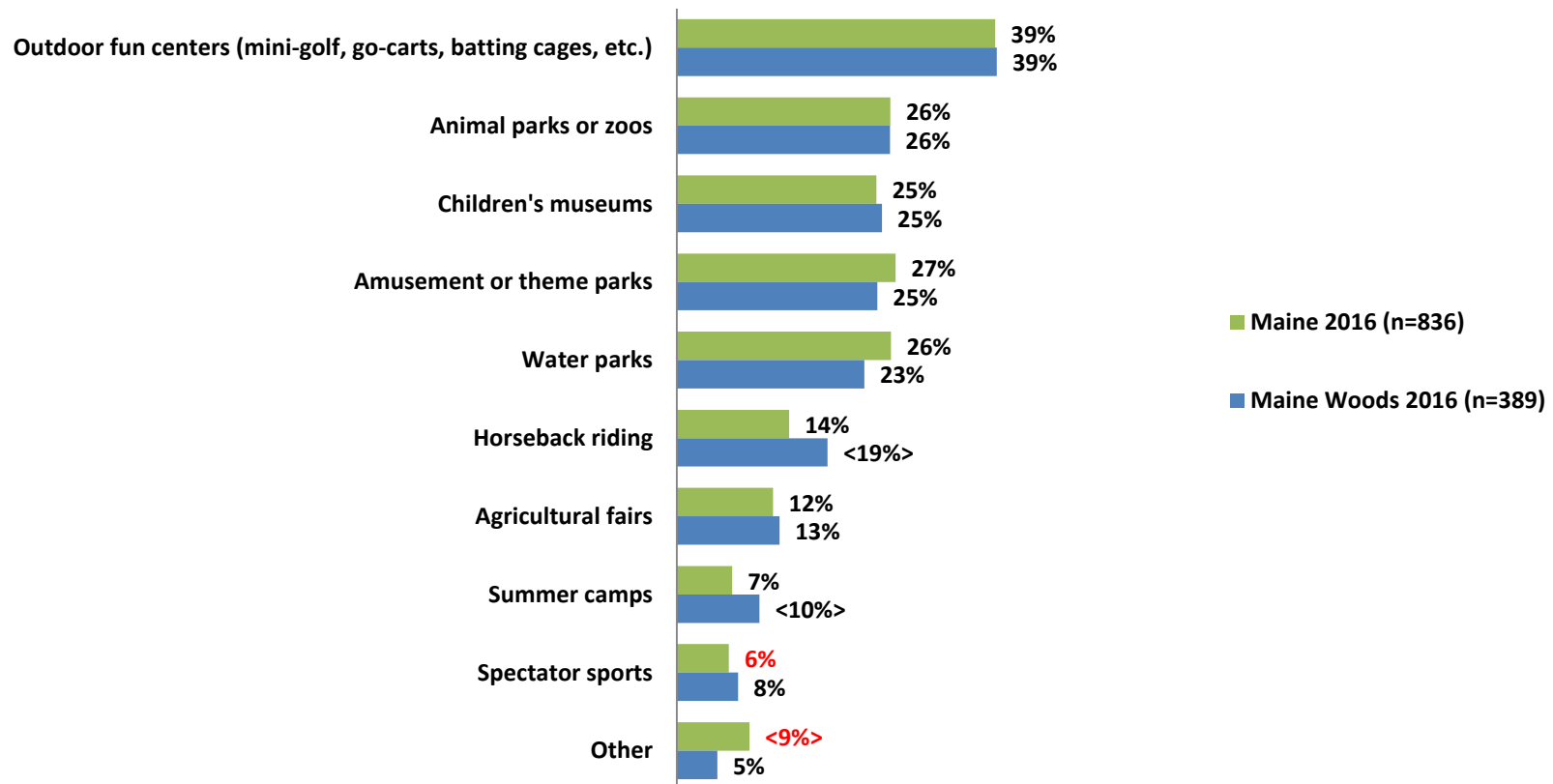<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Overnight visitors who are interested in family fun/children's activities participate in a wide variety of these activities while visiting.

Family Fun/Children's Activities
Base: Those who report family fun/children's activities as an interest area for their Maine trip

Activity	Maine 2016 (n=836)	Maine Woods 2016 (n=389)
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	39%	39%
Animal parks or zoos	26%	26%
Children's museums	25%	25%
Amusement or theme parks	27%	25%
Water parks	26%	23%
Horseback riding	14%	<19%>
Agricultural fairs	12%	13%
Summer camps	7%	<10%>
Spectator sports	6%	8%
Other	<9%>	5%

■ Maine 2016 (n=836)
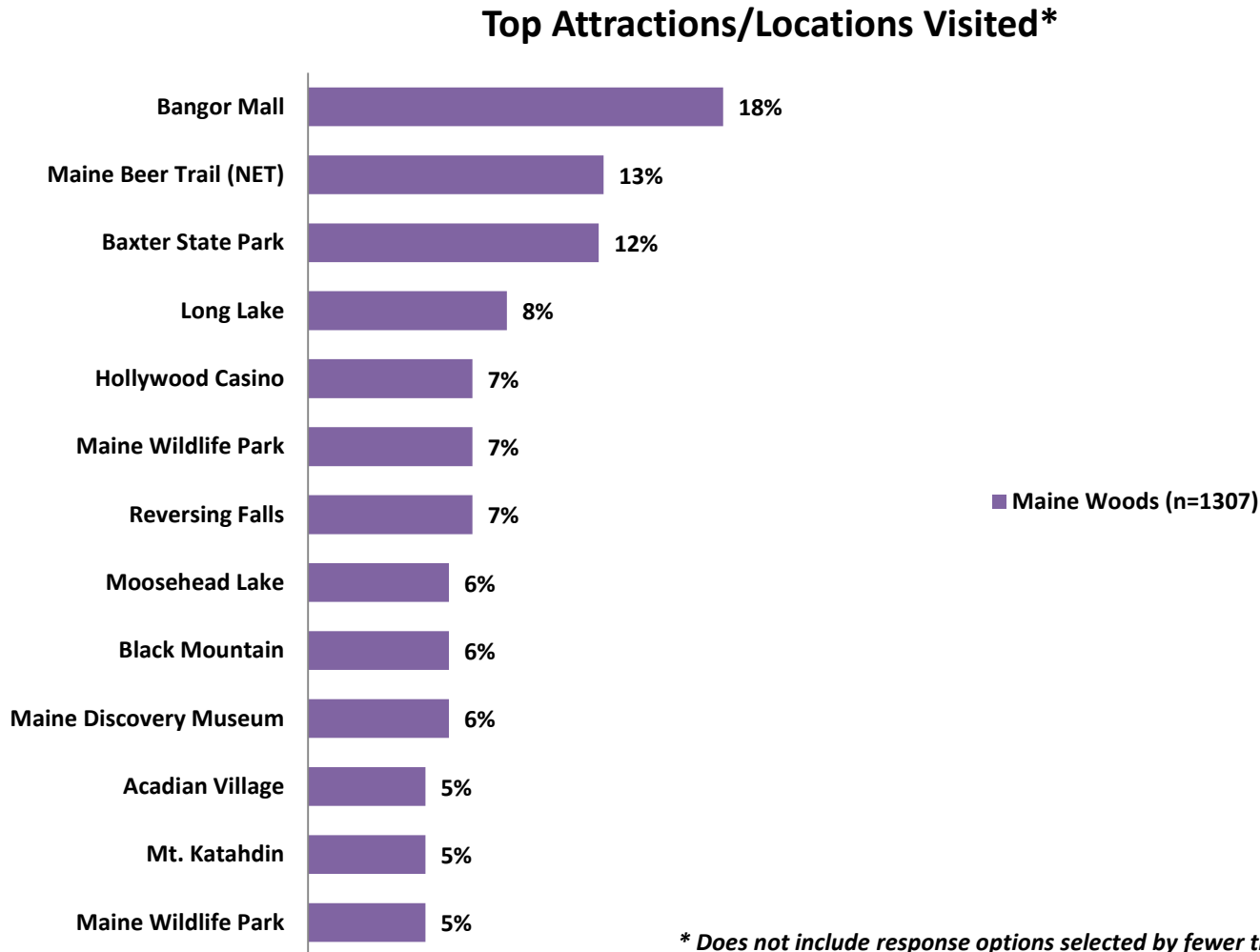■ Maine Woods 2016 (n=389)

Q34. 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.

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Overnight visitors to the Maine Woods are most likely to visit the Bangor Mall.
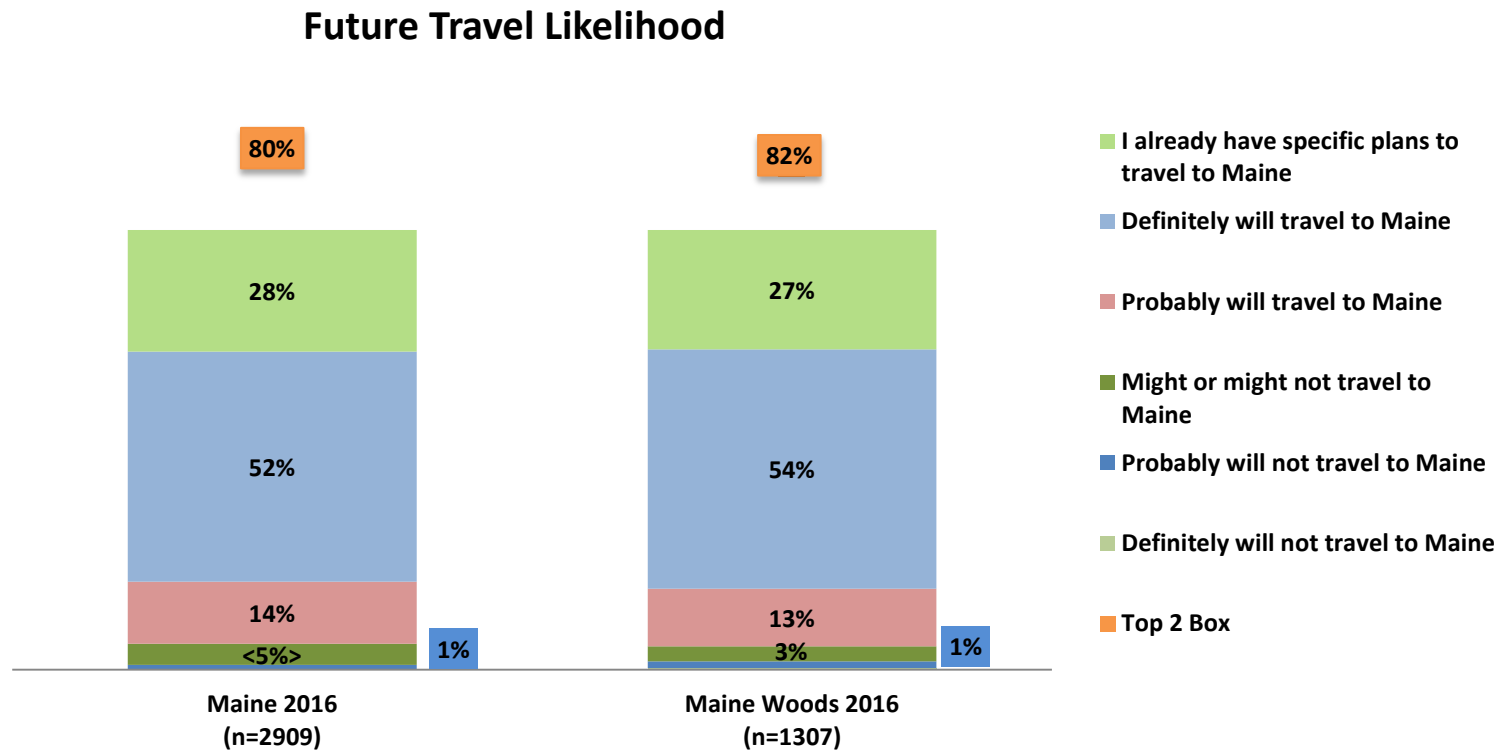
Top Attractions/Locations Visited*

Attraction	Percentage
Bangor Mall	18%
Maine Beer Trail (NET)	13%
Baxter State Park	12%
Long Lake	8%
Hollywood Casino	7%
Maine Wildlife Park	7%
Reversing Falls	7%
Moosehead Lake	6%
Black Mountain	6%
Maine Discovery Museum	6%
Acadian Village	5%
Mt. Katahdin	5%
Maine Wildlife Park	5%

■ Maine Woods (n=1307)

Does not include response options selected by fewer than 5% of respondents.

Q29: 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.

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Four-fifths of overnight visitors to the region either *already have plans* to return to Maine or indicate that they *definitely will return*.

Future Travel Likelihood

Maine 2016
(n=2909)

- 80%
- 28%
- 52%
- 14%
- <5%>
- 1%

Maine Woods 2016
(n=1307)

- 82%
- 27%
- 54%
- 13%
- 3%
- 1%

Legend:
- I already have specific plans to travel to Maine
- Definitely will travel to Maine
- Probably will travel to Maine
- Might or might not travel to Maine
- Probably will not travel to Maine
- Definitely will not travel to Maine
- Top 2 Box

Q41. 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:
Traveler Description

Day Visitor Demographics

- Day visitors to the Maine Woods Area are 44 years old, on average, and have annual household incomes just over $80,000. Three-fifths have at least a college degree, and just over half are married.

- Day visitors to this region have average household incomes that are lower than day visitors to the State overall, and they trend younger as well.
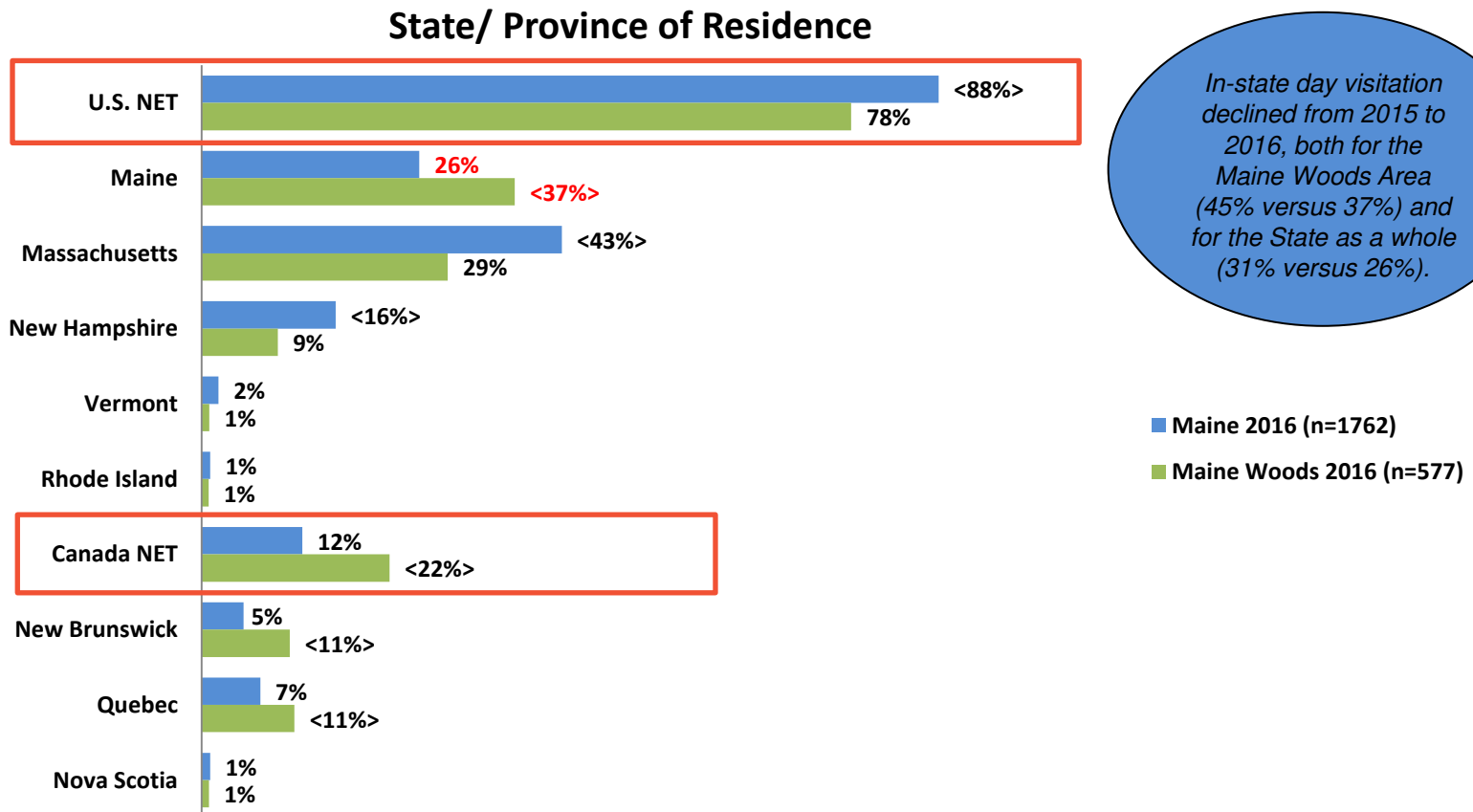
Day Visitors	Maine 2016 (n=1762)	Maine Woods 2016 (n=577)
Age:		
< 35	28%	30%
35 - 44	18%	22%
45 - 54	19%	18%
55 +	<35%>	30%
Mean Age (Years)	<46.0>	44.4
Income:		
< $50,000	26%	<33%>
$50,000 - $99,999	42%	39%
$100,000 +	<32%>	28%
Mean Income	<$88,100>	$80,300
Female	75%	73%
College Degree or Higher	63%	59%
Married	56%	53%
Employed Full-Time	52%	55%

<> 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.

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Three in four day visitors to the Maine Woods Area are U.S. residents, with the highest proportion originating from Maine.

- Overall, the Maine Woods Area attracts a <u>greater</u> proportion of day visitors from Canada, as compared to the State as a whole, and a <u>lesser</u> proportion from the United States.

- Specifically, the Maine Woods is a more popular destination than the State overall for in-state day visitors and those from New Brunswick. Day visitors from Massachusetts and New Hampshire, however, are <u>less</u> likely to be visiting this region than the rest of the State.

State/ Province of Residence

	Maine 2016 (n=1762)	Maine Woods 2016 (n=577)
U.S. NET	<88%>	78%
Maine	26%	<37%>
Massachusetts	<43%>	29%
New Hampshire	<16%>	9%
Vermont	2%	1%
Rhode Island	1%	1%
Canada NET	12%	<22%>
New Brunswick	5%	<11%>
Quebec	7%	<11%>
Nova Scotia	1%	1%

In-state day visitation declined from 2015 to 2016, both for the Maine Woods Area (45% versus 37%) and for the State as a whole (31% versus 26%).

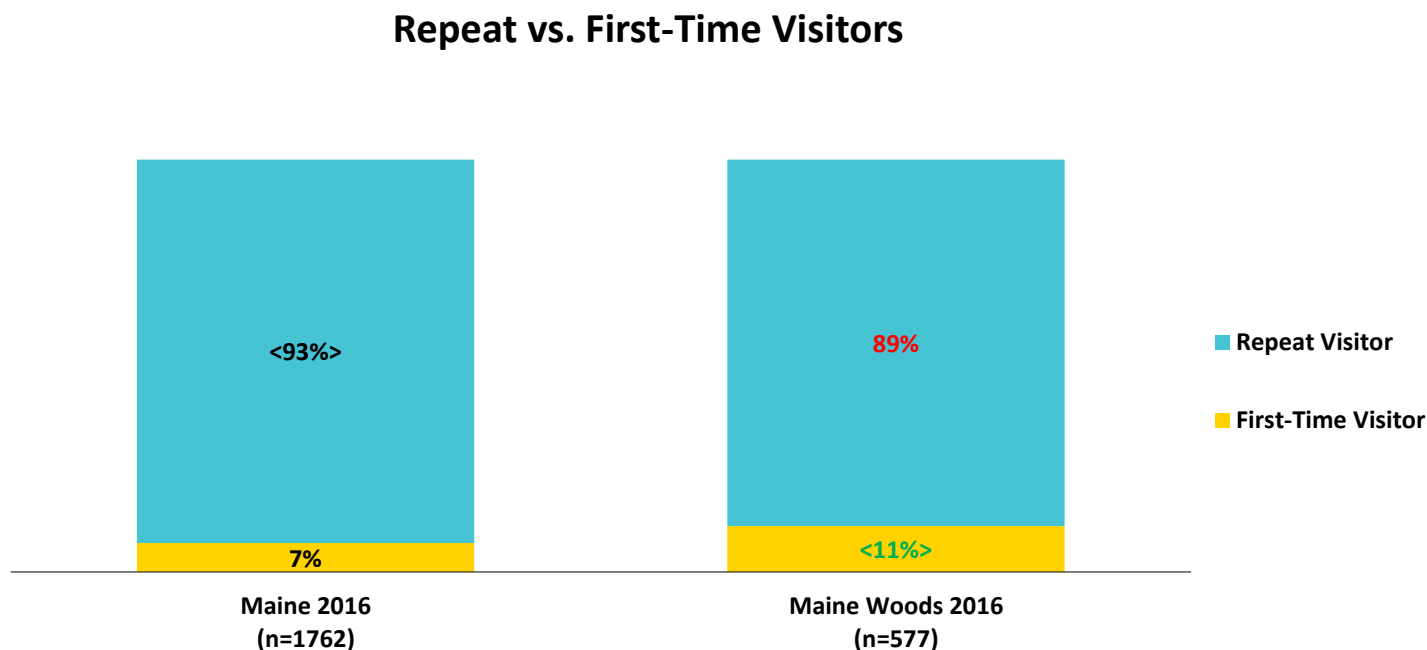■ Maine 2016 (n=1762)
■ Maine Woods 2016 (n=577)

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.

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Nine in ten day visitors to the Maine Woods Area are repeat visitors.

- The Maine Woods Area attracts a <u>greater</u> proportion of first-time day visitors, as compared to the State of Maine as a whole.
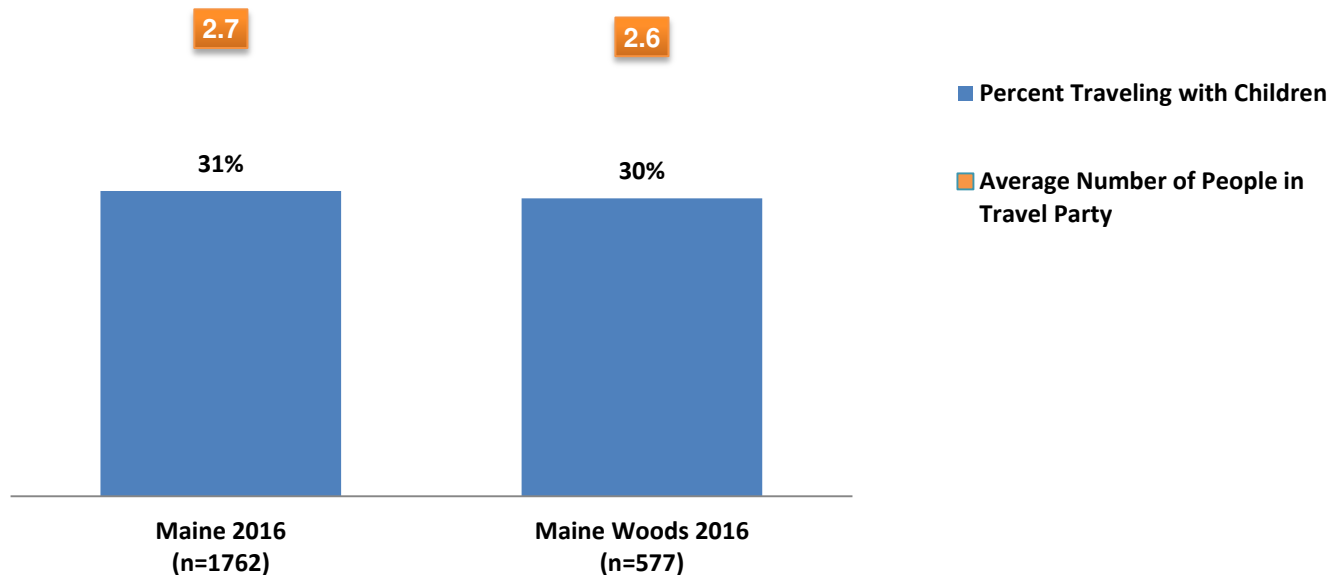
Repeat vs. First-Time Visitors

<93%>	89%
7%	<11%>
Maine 2016 **(n=1762)**	**Maine Woods 2016** **(n=577)**

■ Repeat Visitor
■ First-Time Visitor

Q10. Was this your first visit to 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.

dpa

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

Travel Party Composition

2.7

2.6

31%

30%

■ **Percent Traveling with Children**

■ **Average Number of People in Travel Party**

Maine 2016
(n=1762)

Maine Woods 2016
(n=577)

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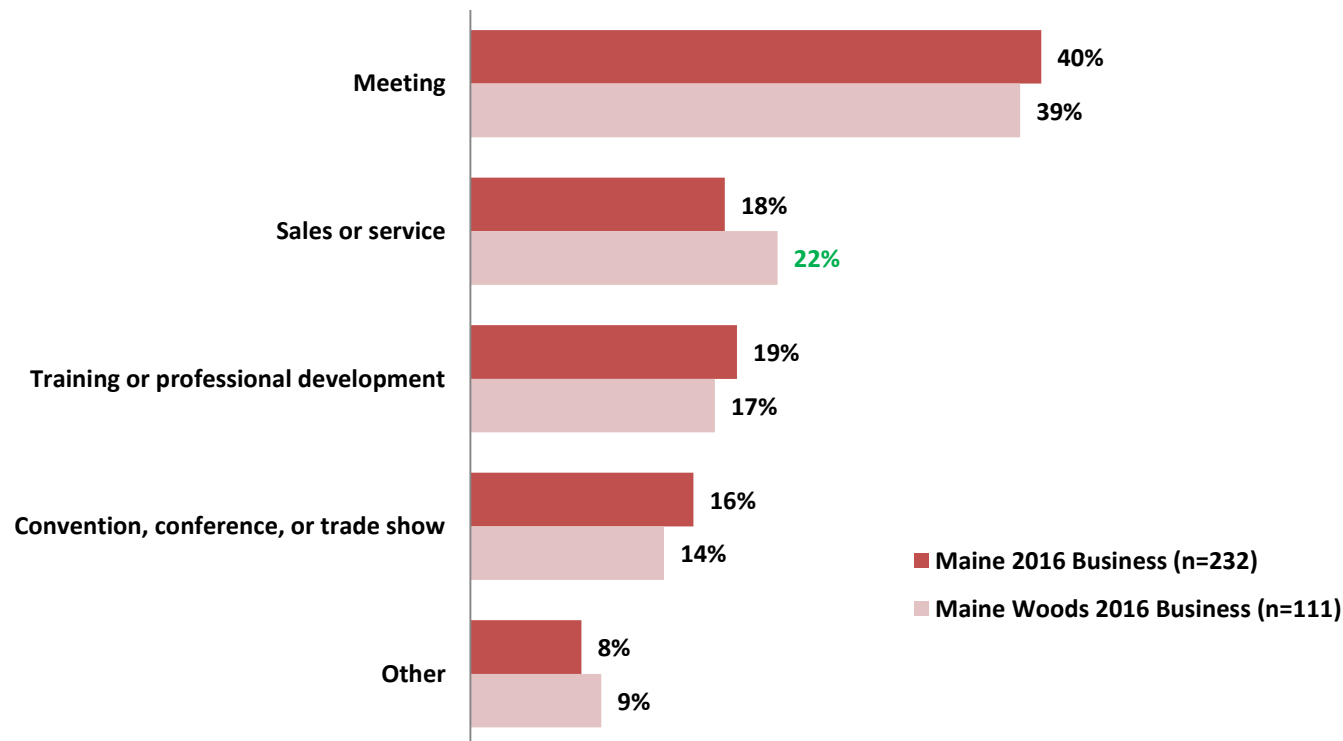Q16. How many of these people were: Children
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Day Visitors:
Trip Experience

Two in five business day visitors are in the Maine Woods Area for a *general meeting*.

Primary Purpose of Day Business Trips

Meeting
- 40%
- 39%

Sales or service
- 18%
- 22%

Training or professional development
- 19%
- 17%

Convention, conference, or trade show
- 16%
- 14%

■ Maine 2016 Business (n=232)
■ Maine Woods 2016 Business (n=111)
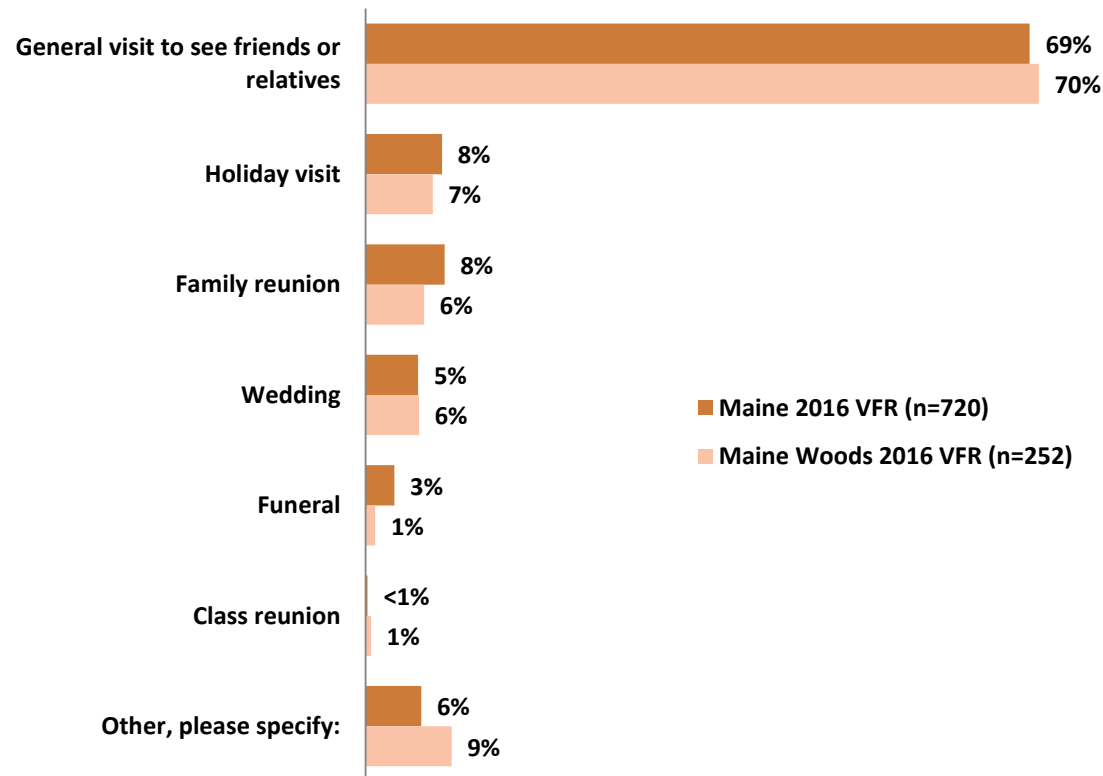
Other
- 8%
- 9%

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.

dpa

Most Maine Woods day visitors on a VFR trip are visiting primarily for a *general visit to see friends/relatives*.

Primary Purpose of Day VFR Trips

Purpose	Maine 2016 VFR (n=720)	Maine Woods 2016 VFR (n=252)
General visit to see friends or relatives	69%	70%
Holiday visit	8%	7%
Family reunion	8%	6%
Wedding	5%	6%
Funeral	3%	1%
Class reunion	<1%	1%
Other, please specify:	6%	9%

■ Maine 2016 VFR (n=720)
■ Maine Woods 2016 VFR (n=252)

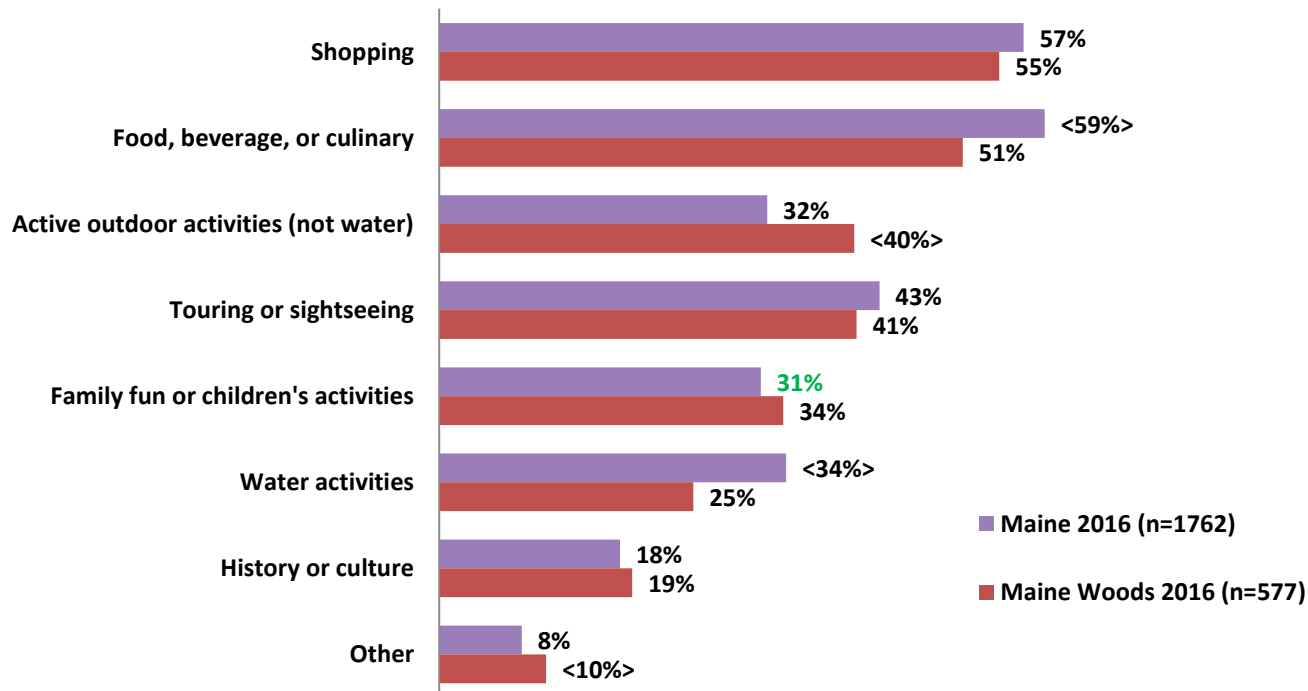Q9. What was the primary purpose of your most recent visit to friends or relatives in Maine?
<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

dpa

The top interest areas pursued by day visitors to this area are *shopping* and *food/beverage/culinary* activities.

- Day visitors to the Maine Woods Area are <u>more</u> likely than day visitors to Maine overall to be interested in pursuing *active outdoor activities* and <u>less</u> likely to be interested in *food/beverage/culinary activities* and *water activities*.

2016 Interest Areas

Interest Area	Maine 2016 (n=1762)	Maine Woods 2016 (n=577)
Shopping	57%	55%
Food, beverage, or culinary	<59%>	51%
Active outdoor activities (not water)	32%	<40%>
Touring or sightseeing	43%	41%
Family fun or children's activities	31%	34%
Water activities	<34%>	25%
History or culture	18%	19%
Other	8%	<10%>

Most Important Interest Area Maine Woods

Shopping	31%
Food, beverage, or culinary	24%
Active outdoor activities (not water)	48%
Touring or sightseeing	43%
Family fun or children's activities	46%
Water activities	25%
History or culture	18%
Other	84%

■ Maine 2016 (n=1762)
■ Maine Woods 2016 (n=577)

Q18. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply*.
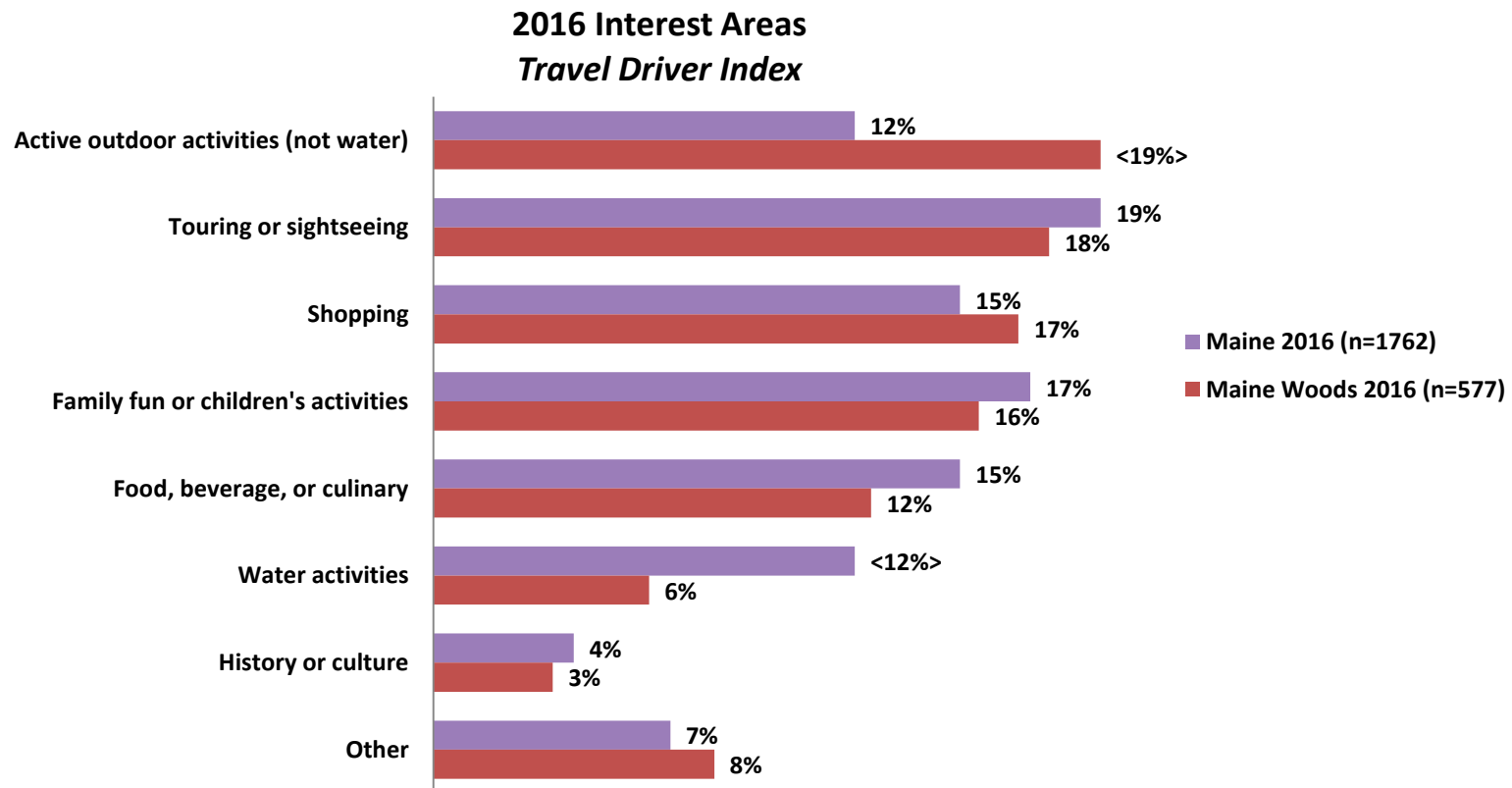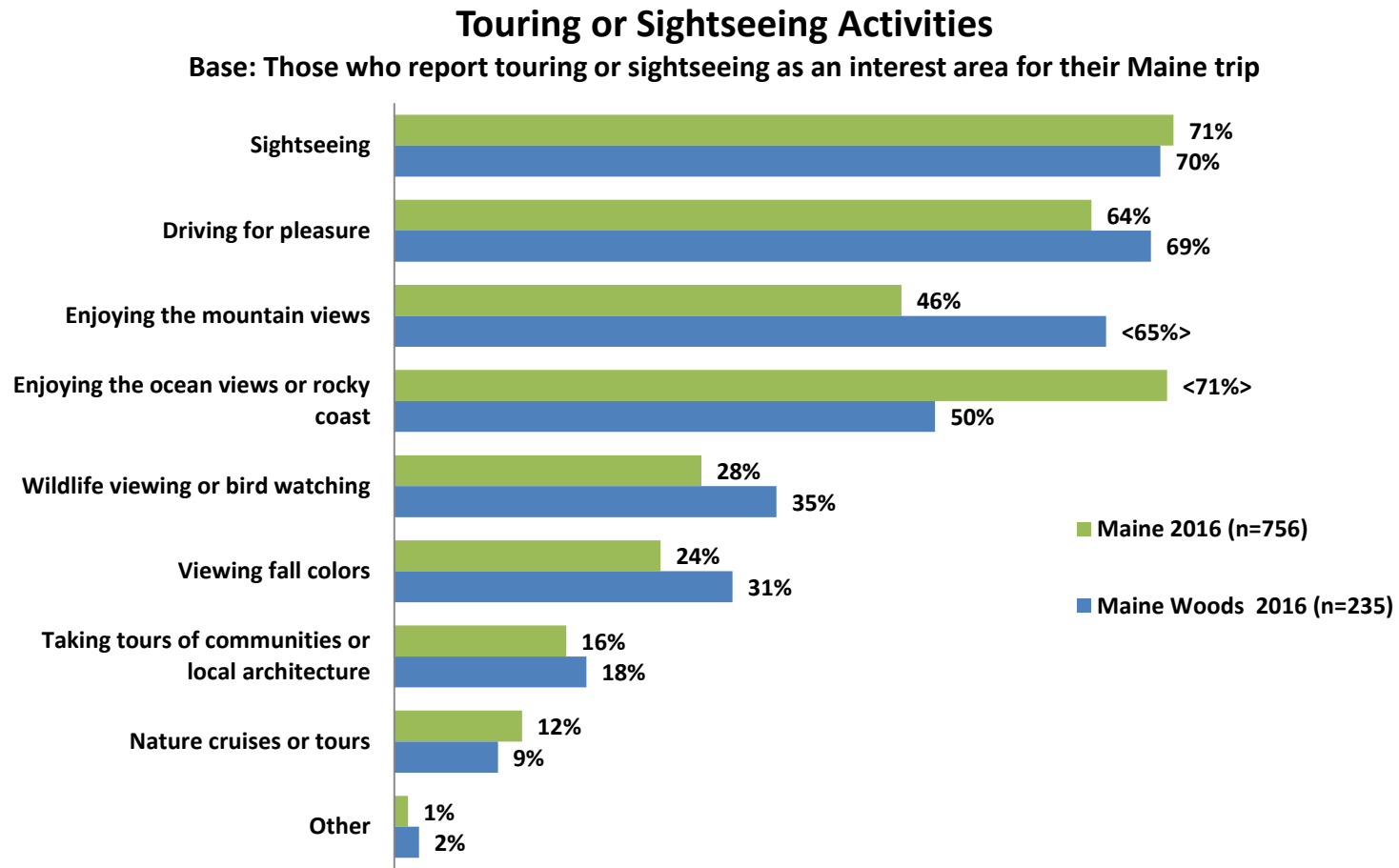Q19. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the <u>most important</u>.
<> indicates a significant difference between subgroups at the 95% confidence level.
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When looking at both interest and importance, a number of interest areas rise to the top for day visitors to the Maine Woods Area.

- When looking at visitors' interest in various activities along with the importance they place on these activities in selecting Maine as a destination, day visitors to the Maine Woods region are more likely than visitors to the State as a whole to place importance on *non-aquatic active outdoor activities.* They are less likely than visitors to the State as a whole to place importance on *water activities.*

2016 Interest Areas
Travel Driver Index

Interest Area	Maine 2016 (n=1762)	Maine Woods 2016 (n=577)
Active outdoor activities (not water)	12%	<19%>
Touring or sightseeing	19%	18%
Shopping	15%	17%
Family fun or children's activities	17%	16%
Food, beverage, or culinary	15%	12%
Water activities	<12%>	6%
History or culture	4%	3%
Other	7%	8%

Travel Driver Index = percentage selecting category as interest area X percentage ranking same interest area as most important

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Sightseeing and *driving for pleasure* are the most popular touring/sightseeing activities for day visitors to the Maine Woods.

- Enjoying the mountain views is <u>more</u> popular among Maine Woods day visitors than it is among day visitors to the State as a whole, while enjoying the ocean views is <u>less</u> popular among Maine Woods day visitors.

Touring or Sightseeing Activities
Base: Those who report touring or sightseeing as an interest area for their Maine trip

Activity	Maine 2016 (n=756)	Maine Woods 2016 (n=235)
Sightseeing	71%	70%
Driving for pleasure	64%	69%
Enjoying the mountain views	46%	<65%>
Enjoying the ocean views or rocky coast	<71%>	50%
Wildlife viewing or bird watching	28%	35%
Viewing fall colors	24%	31%
Taking tours of communities or local architecture	16%	18%
Nature cruises or tours	12%	9%
Other	1%	2%

- ■ Maine 2016 (n=756)
- ■ Maine Woods 2016 (n=235)

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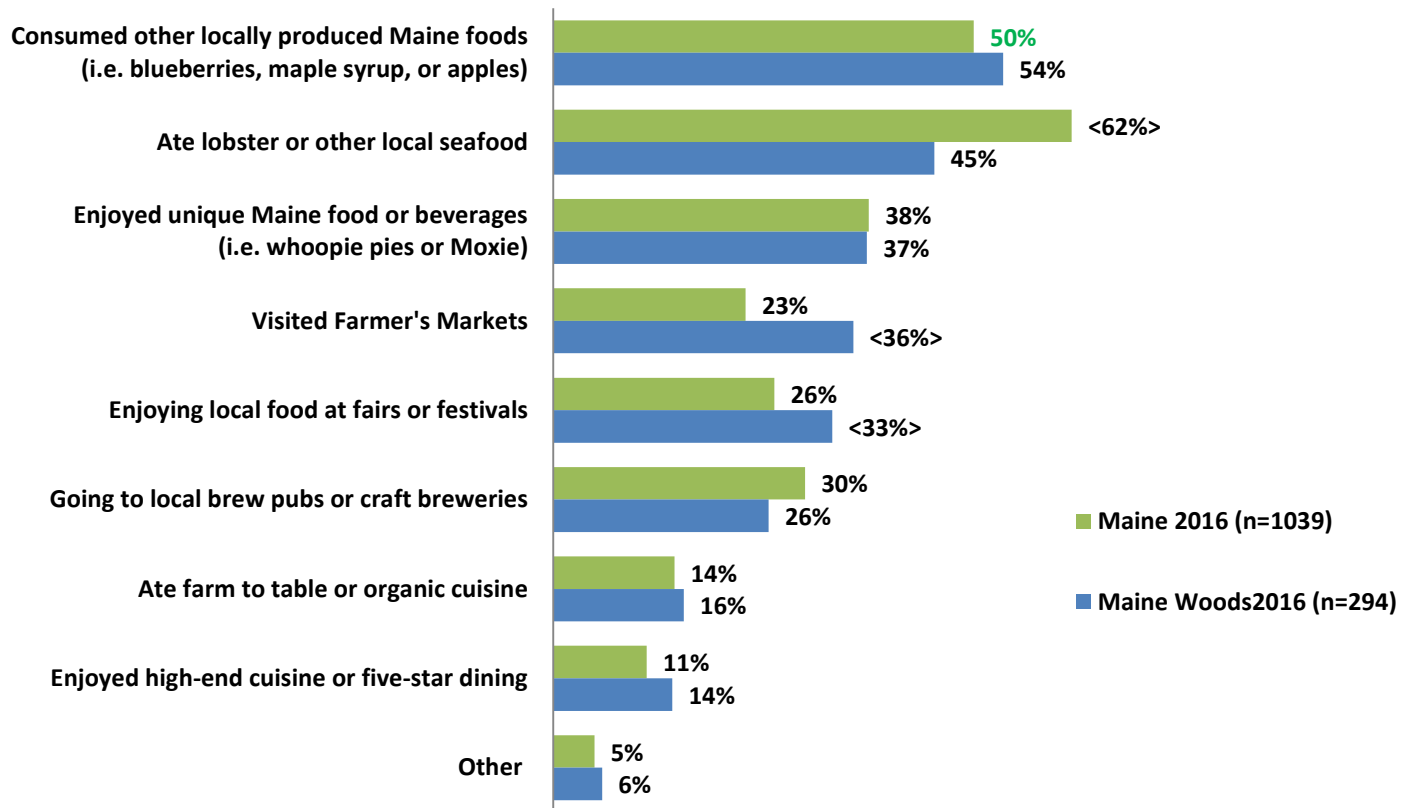Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Among day visitors interested in food/beverage/culinary activities, more than half say they *consumed non-seafood locally produced Maine foods* while visiting the Maine Woods Area.

- Day visitors to the Maine Woods region are <u>more</u> likely than visitors to the State as a whole to have *enjoyed local foods at fairs or festivals* and *visited Farmer's Markets* while in the area. They are <u>less</u> likely to have *eaten lobster or other local seafood*.

Food, Beverage, or Culinary Activities
Base: Those who report food, beverage, or culinary as an interest area for their Maine trip

Activity	Maine 2016 (n=1039)	Maine Woods 2016 (n=294)
Consumed other locally produced Maine foods (i.e. blueberries, maple syrup, or apples)	50%	54%
Ate lobster or other local seafood	<62%>	45%
Enjoyed unique Maine food or beverages (i.e. whoopie pies or Moxie)	38%	37%
Visited Farmer's Markets	23%	<36%>
Enjoying local food at fairs or festivals	26%	<33%>
Going to local brew pubs or craft breweries	30%	26%
Ate farm to table or organic cuisine	14%	16%
Enjoyed high-end cuisine or five-star dining	11%	14%
Other	5%	6%

■ Maine 2016 (n=1039)
■ Maine Woods2016 (n=294)

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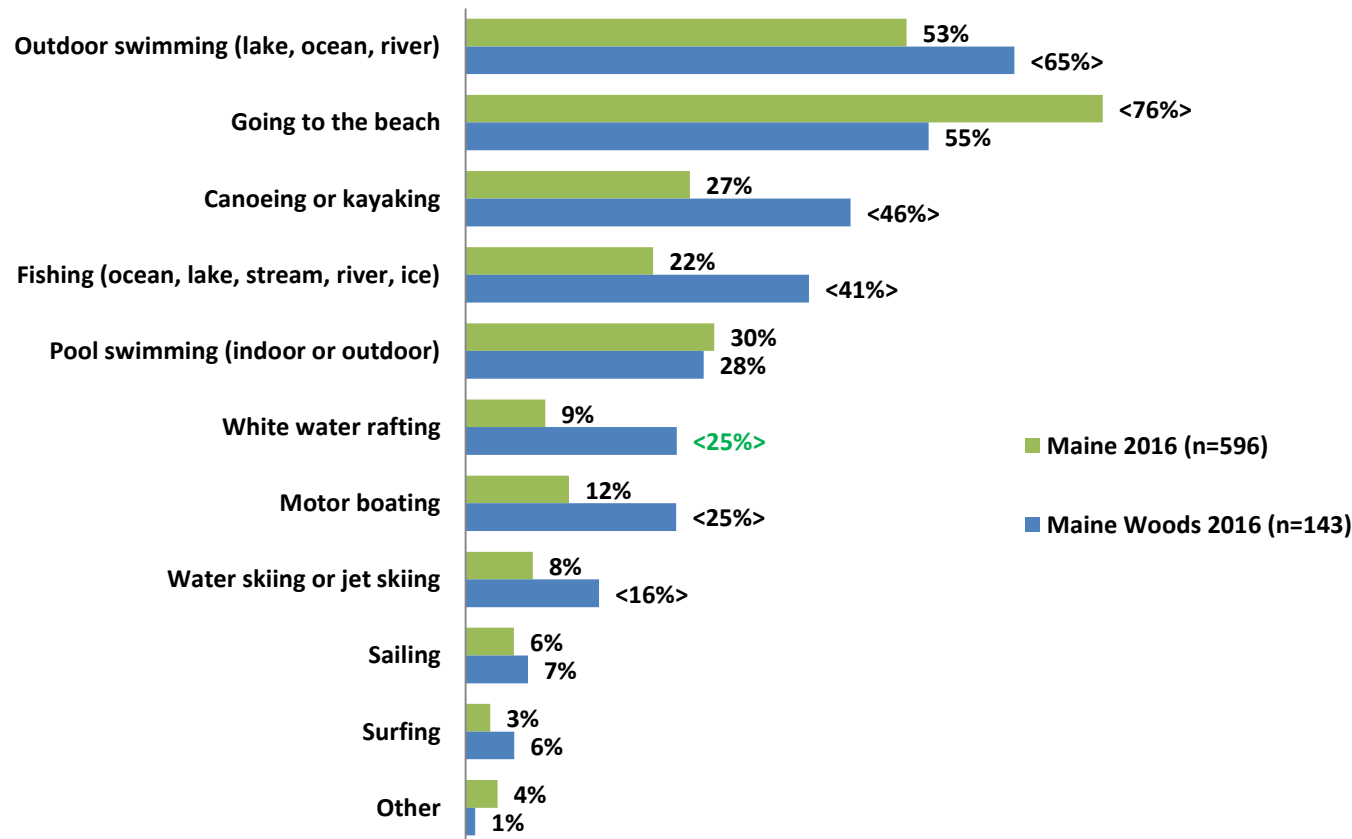Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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Maine Woods day visitors who are interested in water activities are most likely to *go swimming outdoors*.

2016 Regional Report
Maine Woods Area

- Maine Woods day visitors are more likely than day visitors to the State as a whole to participate in various water activities while visiting: *outdoor swimming, canoeing/kayaking, fishing, white water rafting, motor boating, and water/jet skiing.*

Water Activities
Base: Those who report water activities as an interest area for their Maine trip

Activity	Maine 2016 (n=596)	Maine Woods 2016 (n=143)
Outdoor swimming (lake, ocean, river)	53%	<65%>
Going to the beach	<76%>	55%
Canoeing or kayaking	27%	<46%>
Fishing (ocean, lake, stream, river, ice)	22%	<41%>
Pool swimming (indoor or outdoor)	30%	28%
White water rafting	9%	<25%>
Motor boating	12%	<25%>
Water skiing or jet skiing	8%	<16%>
Sailing	6%	7%
Surfing	3%	6%
Other	4%	1%

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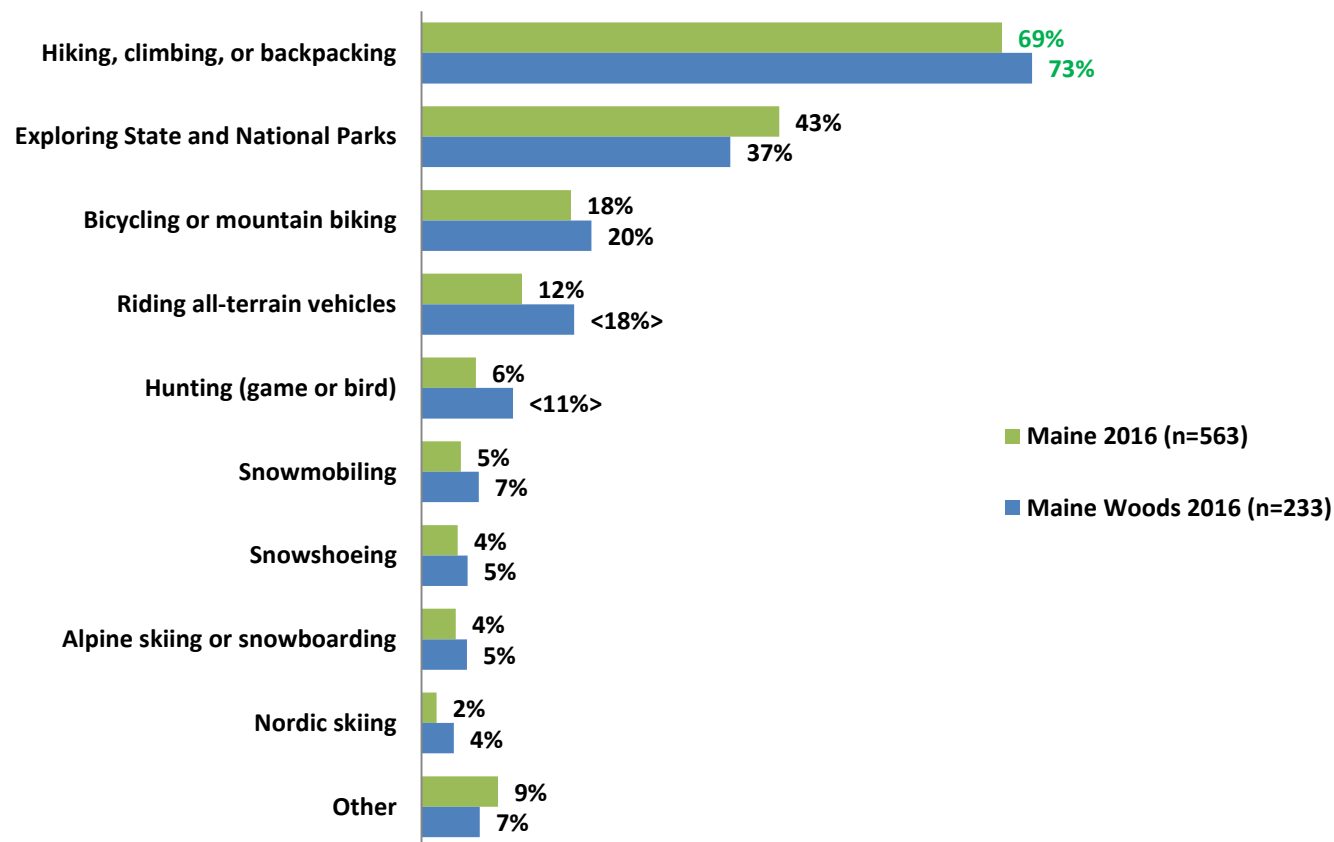Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

38

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Three in four day visitors interested in non-aquatic outdoor activities say they went *hiking, climbing, or backpacking* while visiting the Maine Woods Area.

- Day visitors to the Maine Woods region are <u>more</u> likely than visitors to the State as a whole to have spent time *riding ATVs* and *hunting* while in the area.

Active Outdoor Activities – Non-Water
Base: Those who report outdoor activities as an interest area for their Maine trip

Activity	Maine 2016 (n=563)	Maine Woods 2016 (n=233)
Hiking, climbing, or backpacking	69%	73%
Exploring State and National Parks	43%	37%
Bicycling or mountain biking	18%	20%
Riding all-terrain vehicles	12%	<18%>
Hunting (game or bird)	6%	<11%>
Snowmobiling	5%	7%
Snowshoeing	4%	5%
Alpine skiing or snowboarding	4%	5%
Nordic skiing	2%	4%
Other	9%	7%

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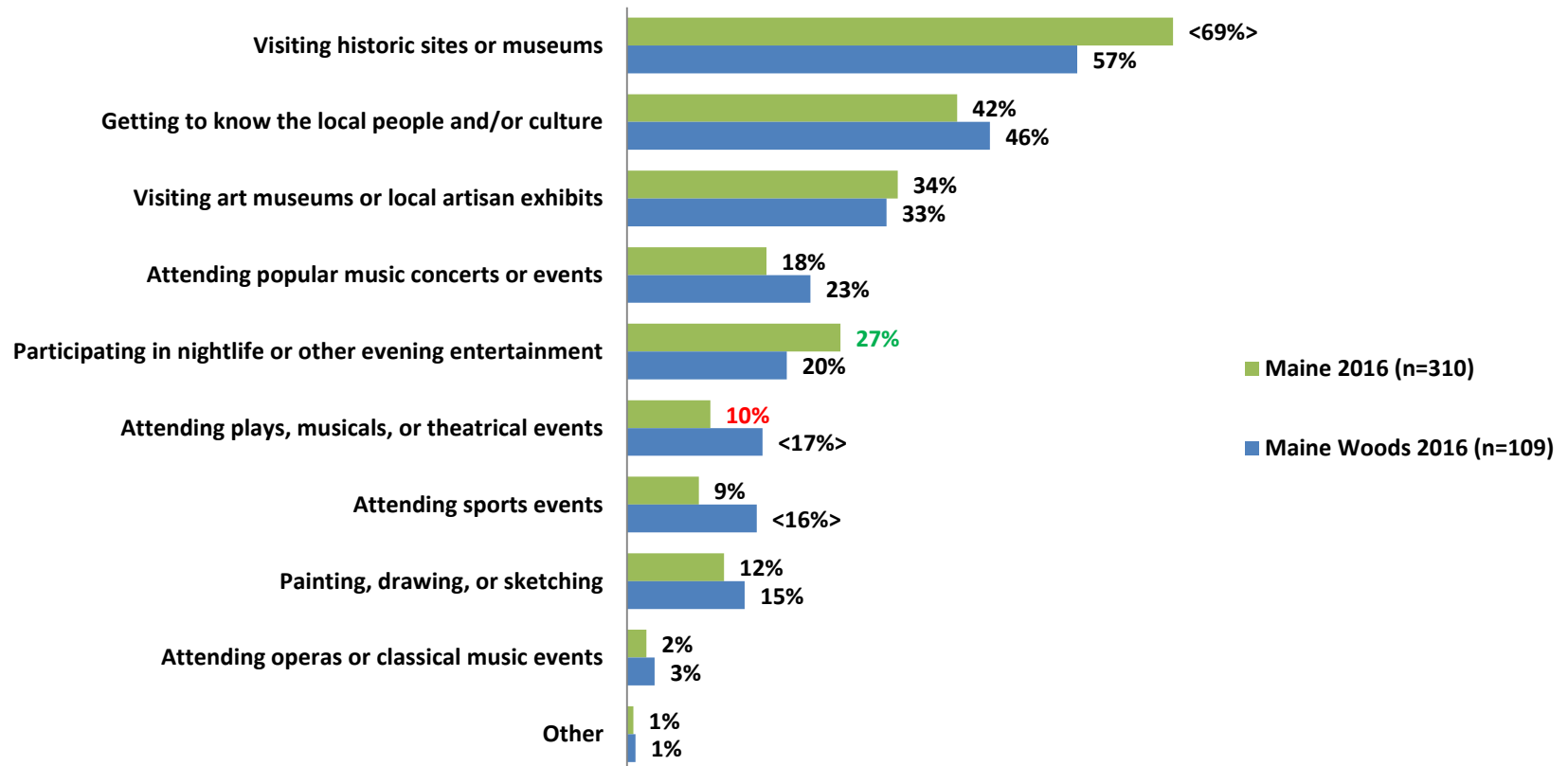Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

39

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The most common history or culture activity that Maine Woods day visitors take part in is *visiting historic sites/museums.*

- Though *visiting historic sites or museums* is the most popular history/culture activity among Maine Woods day visitors, it is <u>less</u> popular than among day visitors to the State as a whole.
- Day visitors to the Maine Woods Area are more likely to *attend sports events* and *plays/musicals/theatrical events* than are visitors to the State as a whole.

History or Culture Activities
Base: Those who report history or culture as an interest area for their Maine trip

Activity	Maine 2016 (n=310)	Maine Woods 2016 (n=109)
Visiting historic sites or museums	<69%>	57%
Getting to know the local people and/or culture	42%	46%
Visiting art museums or local artisan exhibits	34%	33%
Attending popular music concerts or events	18%	23%
Participating in nightlife or other evening entertainment	27%	20%
Attending plays, musicals, or theatrical events	10%	<17%>
Attending sports events	9%	<16%>
Painting, drawing, or sketching	12%	15%
Attending operas or classical music events	2%	3%
Other	1%	1%

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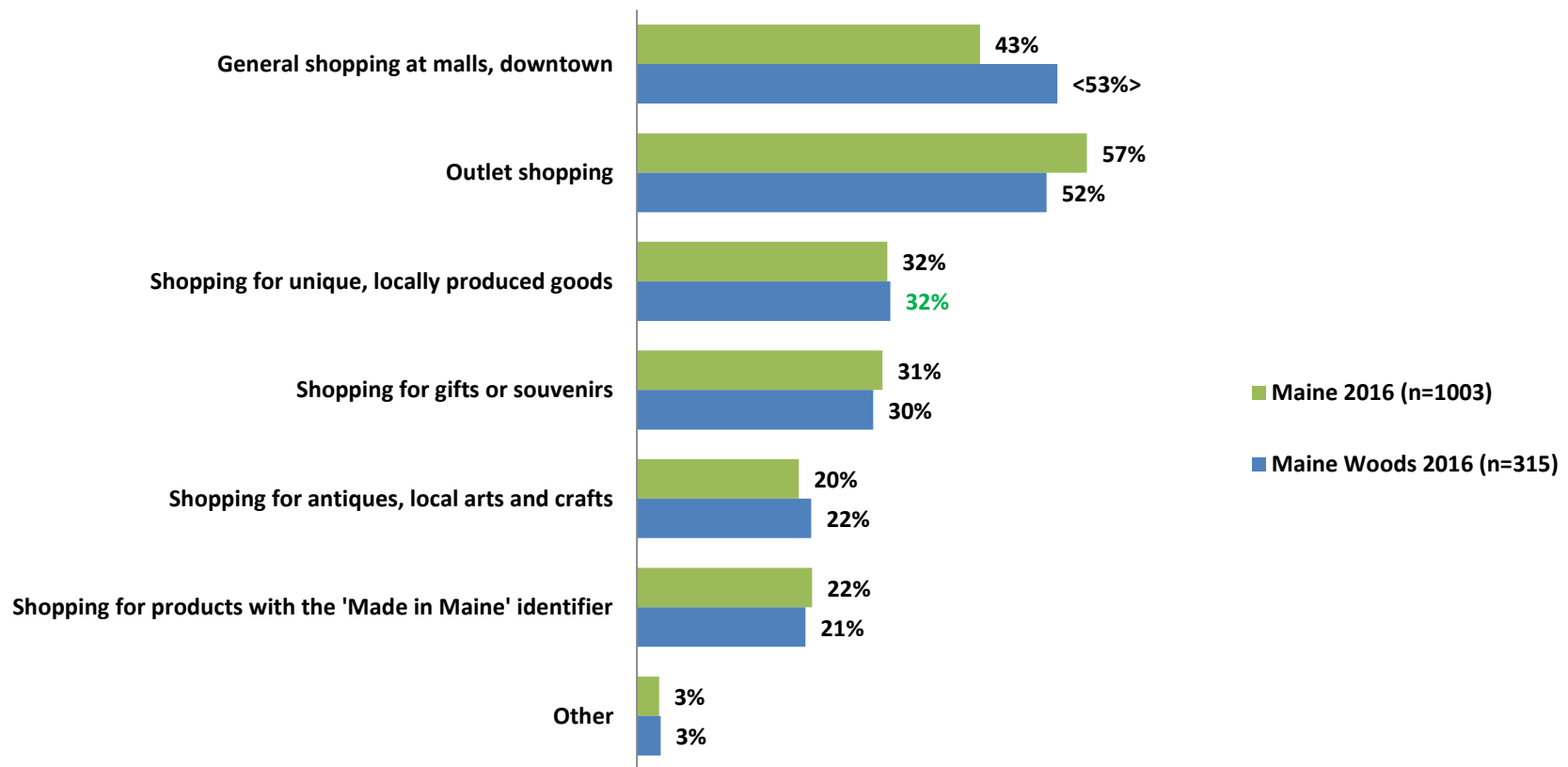<> indicates a significant difference between subgroups at the 95% confidence level.
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

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40

Maine Woods day visitors interested in shopping are most likely to do some *general shopping at malls/downtown* or *outlet shopping*.

- *General mall or downtown shopping* is <u>more</u> popular among Maine Woods shopping enthusiasts than it is among shoppers visiting the State of Maine as a whole.

Shopping Activities
Base: Those who report shopping as an interest area for their Maine trip

General shopping at malls, downtown: 43% / <53%>

Outlet shopping: 57% / 52%

Shopping for unique, locally produced goods: 32% / 32%

Shopping for gifts or souvenirs: 31% / 30%

Shopping for antiques, local arts and crafts: 20% / 22%

Shopping for products with the 'Made in Maine' identifier: 22% / 21%

Other: 3% / 3%

■ Maine 2016 (n=1003)

■ Maine Woods 2016 (n=315)

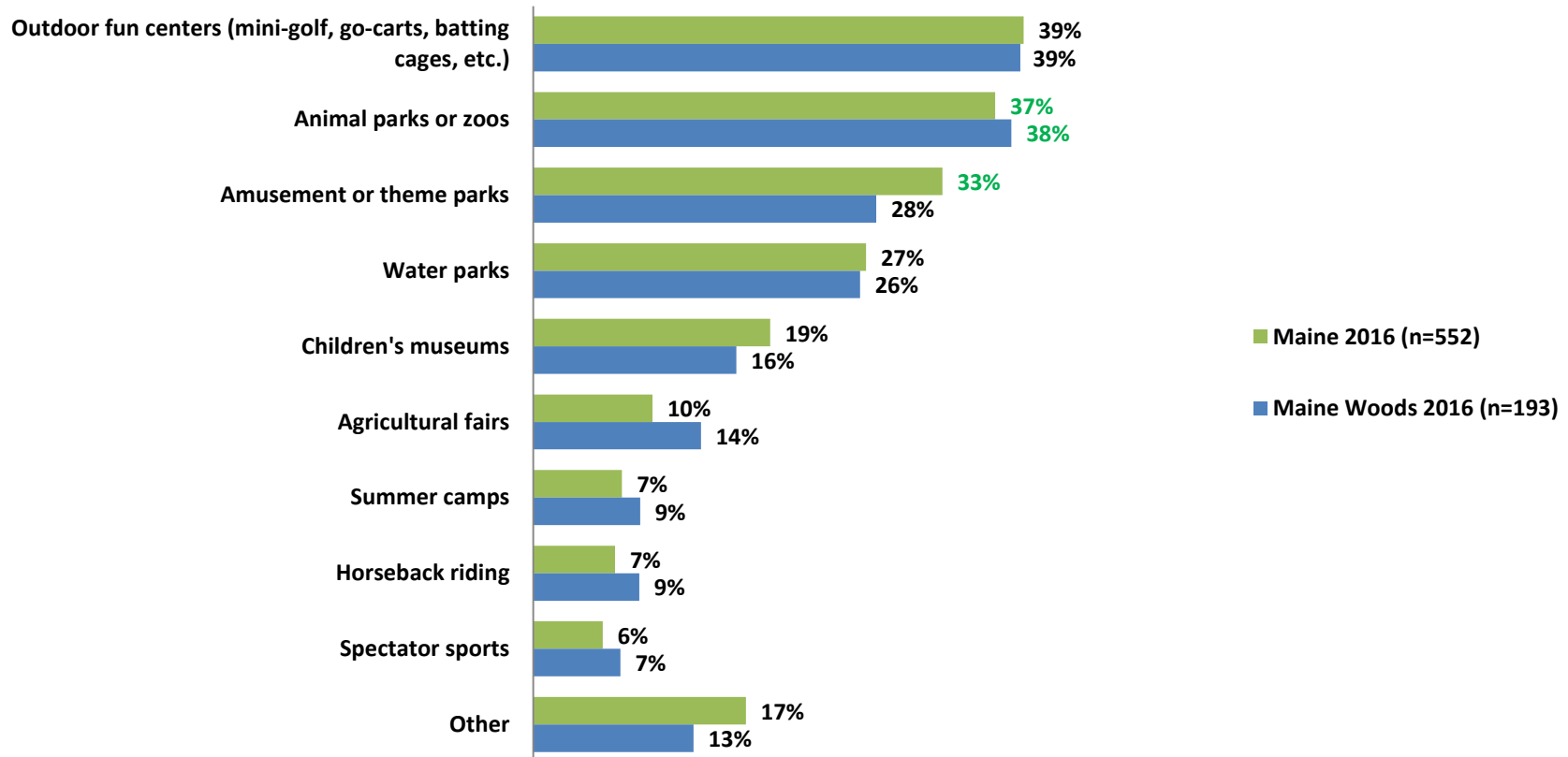Q20. In which of the following activities did you participate during this trip? *Please check all that apply*.
<> indicates a significant difference between subgroups at the 95% confidence level.
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Outdoor fun centers and *animal parks/zoos* are the most common family fun/children's activity among Maine Woods day trippers.

Family Fun/Children's Activities
Base: Those who report family fun/children's activities as an interest area for their Maine trip

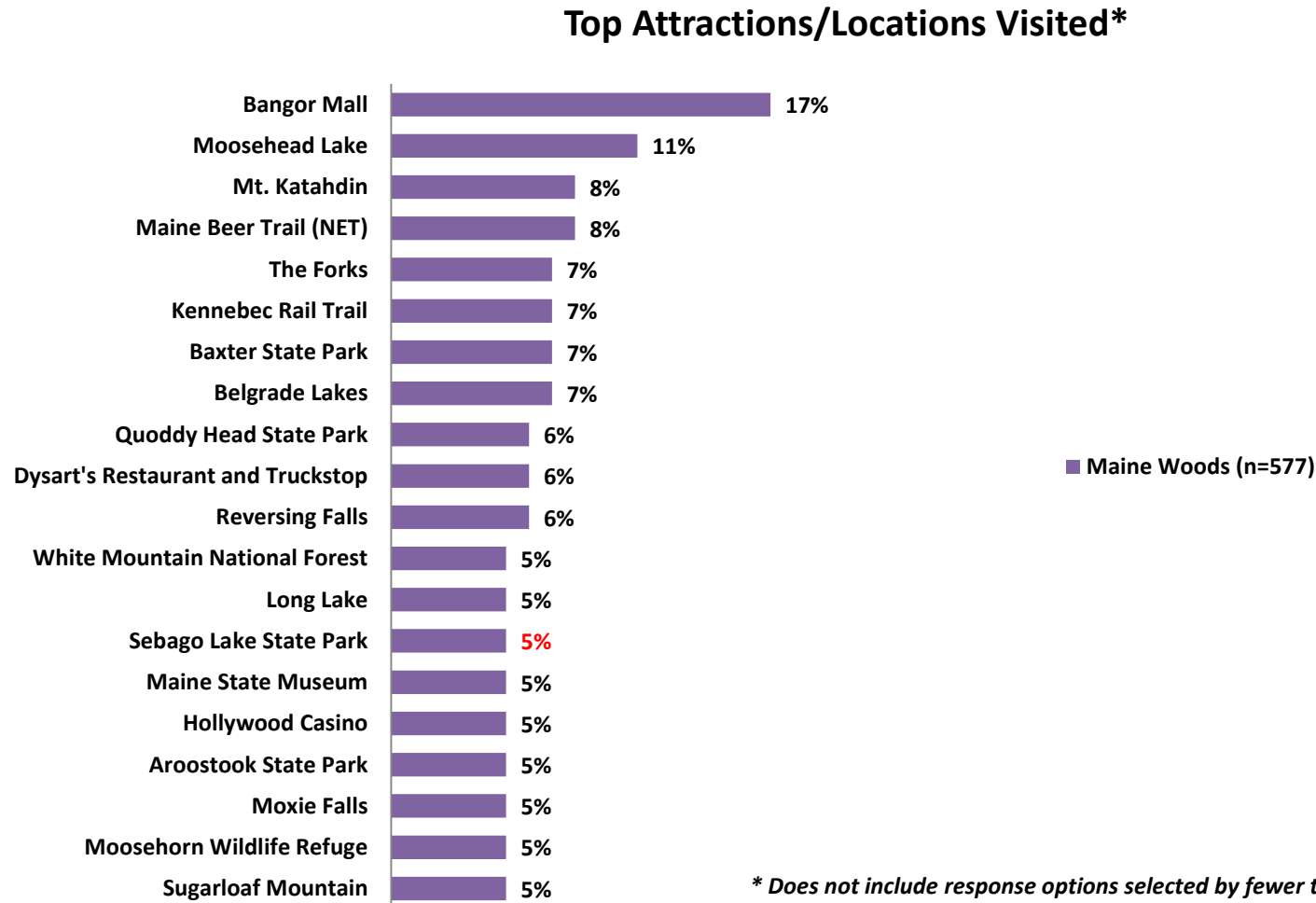| Activity	Maine 2016 (n=552)	Maine Woods 2016 (n=193)
Outdoor fun centers (mini-golf, go-carts, batting cages, etc.)	39%	39%
Animal parks or zoos	37%	38%
Amusement or theme parks	33%	28%
Water parks	27%	26%
Children's museums	19%	16%
Agricultural fairs	10%	14%
Summer camps	7%	9%
Horseback riding	7%	9%
Spectator sports	6%	7%
Other	17%	13%

■ Maine 2016 (n=552)
■ Maine Woods 2016 (n=193)

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.
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As seen with overnight visitors to the Maine Woods Area, the *Bangor Mall* is also the most visited location among day visitors.

Top Attractions/Locations Visited*

Location	Percentage
Bangor Mall	17%
Moosehead Lake	11%
Mt. Katahdin	8%
Maine Beer Trail (NET)	8%
The Forks	7%
Kennebec Rail Trail	7%
Baxter State Park	7%
Belgrade Lakes	7%
Quoddy Head State Park	6%
Dysart's Restaurant and Truckstop	6%
Reversing Falls	6%
White Mountain National Forest	5%
Long Lake	5%
Sebago Lake State Park	5%
Maine State Museum	5%
Hollywood Casino	5%
Aroostook State Park	5%
Moxie Falls	5%
Moosehorn Wildlife Refuge	5%
Sugarloaf Mountain	5%

■ Maine Woods (n=577)

* Does not include response options selected by fewer than 5% of respondents.

Q24: 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.
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Comparison of Maine Woods Visitors to Maine Visitors

Comparisons: Region vs. State

- Visitors to the Maine Woods region and visitors to the State of Maine as a whole differ in a number of areas. These variations can be seen in:

    - Visitor demographics,

    - Visitor origin,

    - Areas of interest, and

    - The activities they participate in while visiting.

- Highlights of these differences are shown on the following pages.

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Visitor Origin

Compared to visitors to the entire State, visitors to the Maine Woods region differ in the following ways:

OVERNIGHT VISITORS

Greater proportion from **Mid-Atlantic states** and **Canada**

Lesser proportion from **New England** (specifically **MA**)

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Visitor Origin

DAY VISITORS

Greater proportion from **Maine**

Lesser proportion from **MA** and **NH**

Overall, **greater** proportion from **Canada** and **lesser** proportion from the **U.S.**

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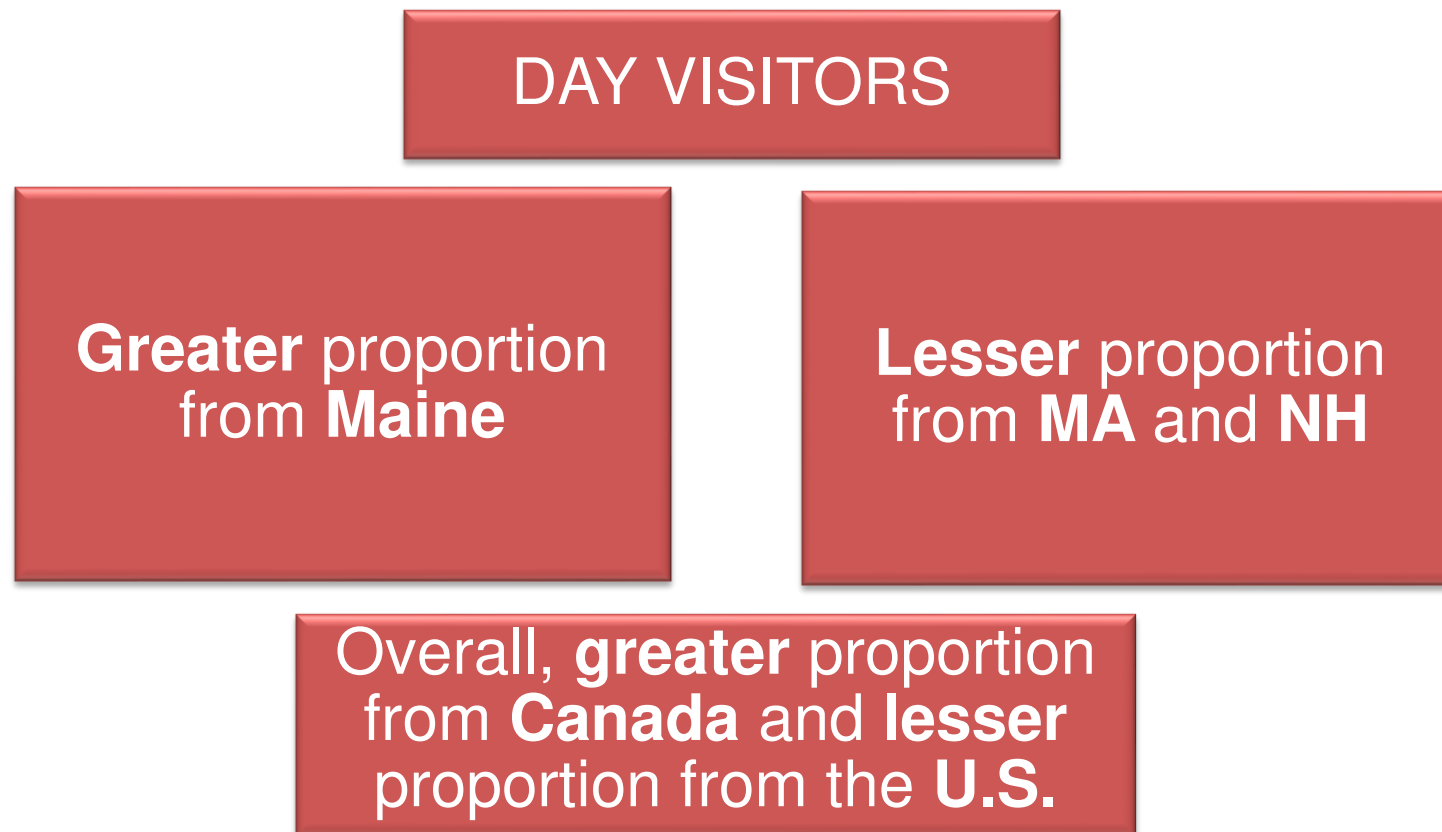
Visitor Demographics

DAY VISITORS	OVERNIGHT VISITORS
Younger **Lower** annual household income	**More** likely to be **employed full-time** **More** likely to **travel with kids**

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Visitor Demographics

OVERNIGHT AND DAY VISITORS

More likely to be **first-time visitors**

More likely to be categorized as **Balanced Achievers**

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Trip Interest Areas

OVERNIGHT VISITORS

More likely to want to pursue:

Active outdoor activities

History or culture

Less likely to want to pursue:

Shopping

Touring or sightseeing

Food/beverage/culinary activities

Trip Interest Areas

DAY VISITORS

More likely to want to pursue **active outdoor** activities

Less likely to want to pursue:
Food/beverage/culinary activities
Water activities

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Trip Interests and Importance (Travel Driver Index)

DAY VISITORS

| **More** likely to place importance on **active outdoor** activities | **Less** likely to place importance on **water activities** |

Trip Activities

OVERNIGHT AND DAY VISITORS

More likely to be:

Enjoying the mountain views

Canoeing/kayaking

Visiting Farmer's Markets

Enjoying local foods at fairs

Hunting

Attending sports events

General shopping at malls/downtown

Less likely to be:

Eating lobster or other local seafood

Going to the beach

Enjoying the ocean views

Visiting historic sites/museums

Trip Activities

OVERNIGHT VISITORS

More likely to be:

Viewing wildlife/bird watching

Viewing fall colors

Horseback riding

Attending summer camps

Alpine skiing/snowboarding

Snowmobiling

Attending operas or classical music events

Water skiing/jet skiing

White water rafting

Less likely to be:

Swimming outdoors

Outlet shopping

Shopping for unique, locally produced goods

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Trip Activities

DAY VISITORS

More likely to be:

Fishing

Swimming outdoors

White water rafting

Motor boating

Water skiing or jet skiing

Riding ATVs

Attending plays, musicals, or theatrical events

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