

**Maine Office of Tourism
Visitor Tracking Research
2013 Calendar Year Annual Report**

***Regional Insights:
Kennebec & Moose River Valley***

Prepared by



May 2014

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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 the ResearchNow national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - Regional Travel Survey
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - Maine Day Visitor Survey
 - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who 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; and
 - Used to determine the incidence of travel nationwide and Maine's share of that travel.
- This report outlines results from calendar year 2013, with travel occurring between January 2013 and December 2013. Data was collected between January 1st and December 15th, 2013. The number of completed statewide surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,675
 - Maine Day Visitor – 1,685
 - National Omnibus Survey – 17,591

Research Objectives and Methodology

- The following report includes data on visitors to the Maine Highlands tourism region.
 - 124 overnight visitors, and
 - 82 day visitors.
- Sample Size Caution: *Please note the small sample size of day visitors to the Kennebec and Moose River Valley region (82). Data on the following pages should be used for directional purposes only.*
- Throughout this report, a 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*



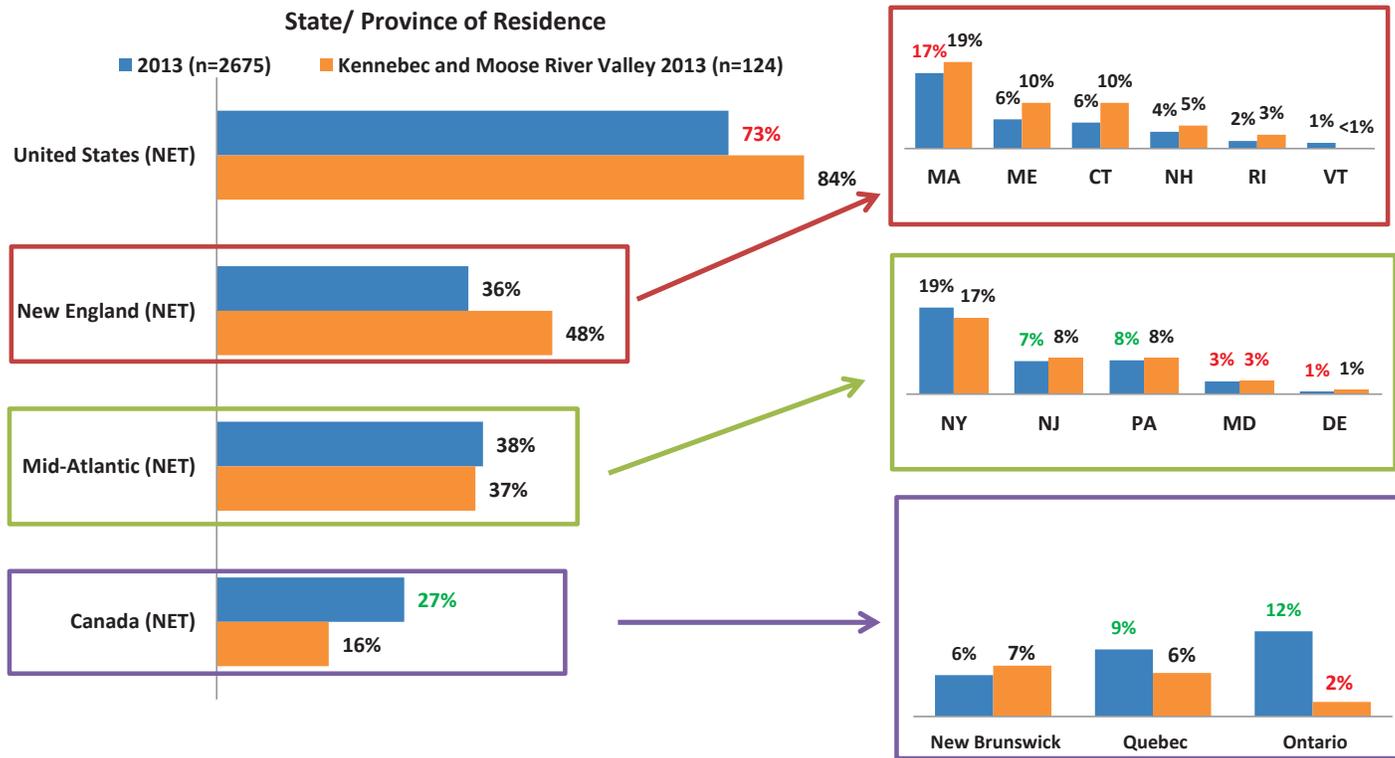
Overnight Visitor Demographics

Overnight Visitors	Maine 2013 (n=2675)	Kennebec and Moose River Valley 2013 (n=124)
Age:		
< 35	25%	29%
35 - 44	17%	15%
45 - 54	22%	21%
55 +	35%	34%
Mean Age (Years)	47.1	46.2
Income:		
< \$50,000	11%	14%
\$50,000 - \$99,000	33%	37%
\$100,000 +	45%	37%
Mean Income (Thousands)	\$115,427	\$110,100
Female	47%	39%
College Degree or Higher	81%	85%
Married	60%	59%
Employed Full Time	68%	74%

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 Kennebec & Moose River Valley are from New England.

- Massachusetts and New York source the greatest proportions of overnight visitors to this region.
- Compared to the State of Maine as a whole, the Kennebec & Moose River Valley region attracts a higher proportion of American visitors and a lower proportion of Canadians.

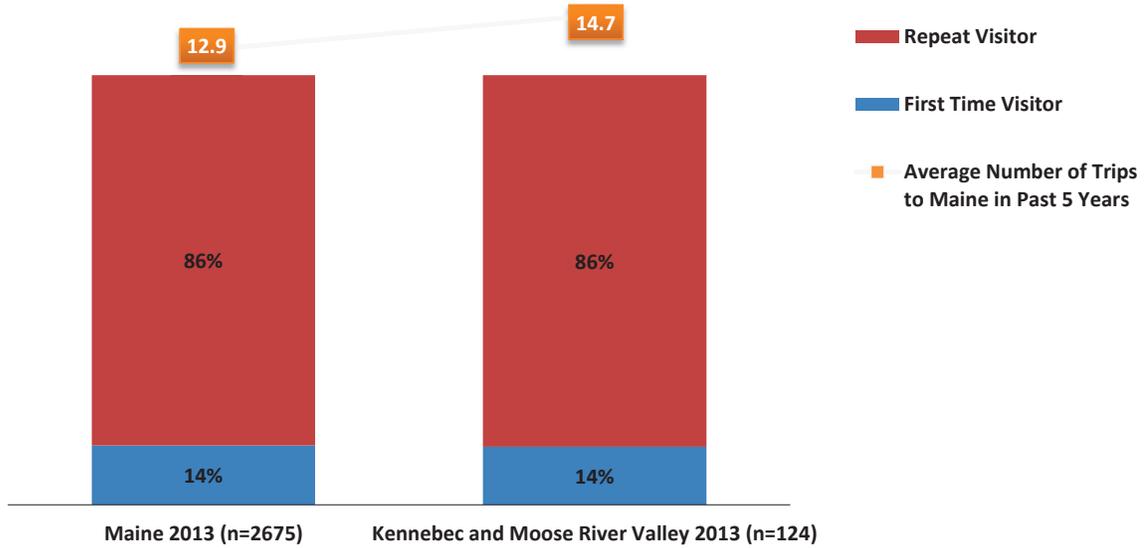


State/ Province of Residence

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

The Kennebec & Moose River Valley enjoys high visitor loyalty, with nearly nine in ten being repeat visitors.

Repeat vs. First Time Visitors



Regional Q9. Was this your first visit in Maine?

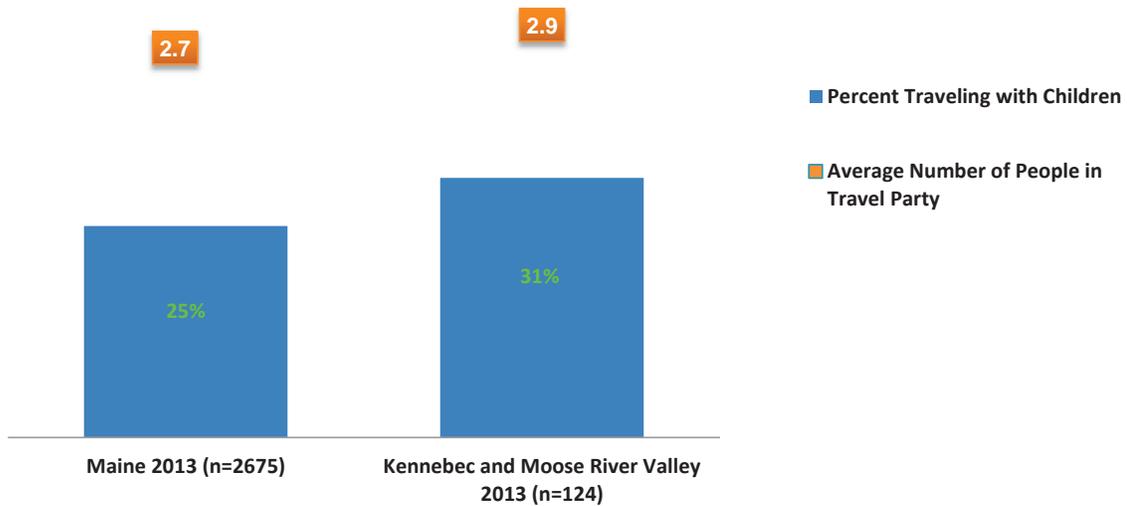
Regional Q10. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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 Kennebec & Moose River Valley travel with children.

- As with overnight visitors to the State of Maine as a whole, the proportion of overnight visitors traveling to this region with kids (31%) has increased over 2012 (19%).

Travel Party Composition



Regional Q24. Including yourself and any children, how many people were in your immediate travel party on this specific trip to Maine?

Regional Q25. How many of these people were: Children?

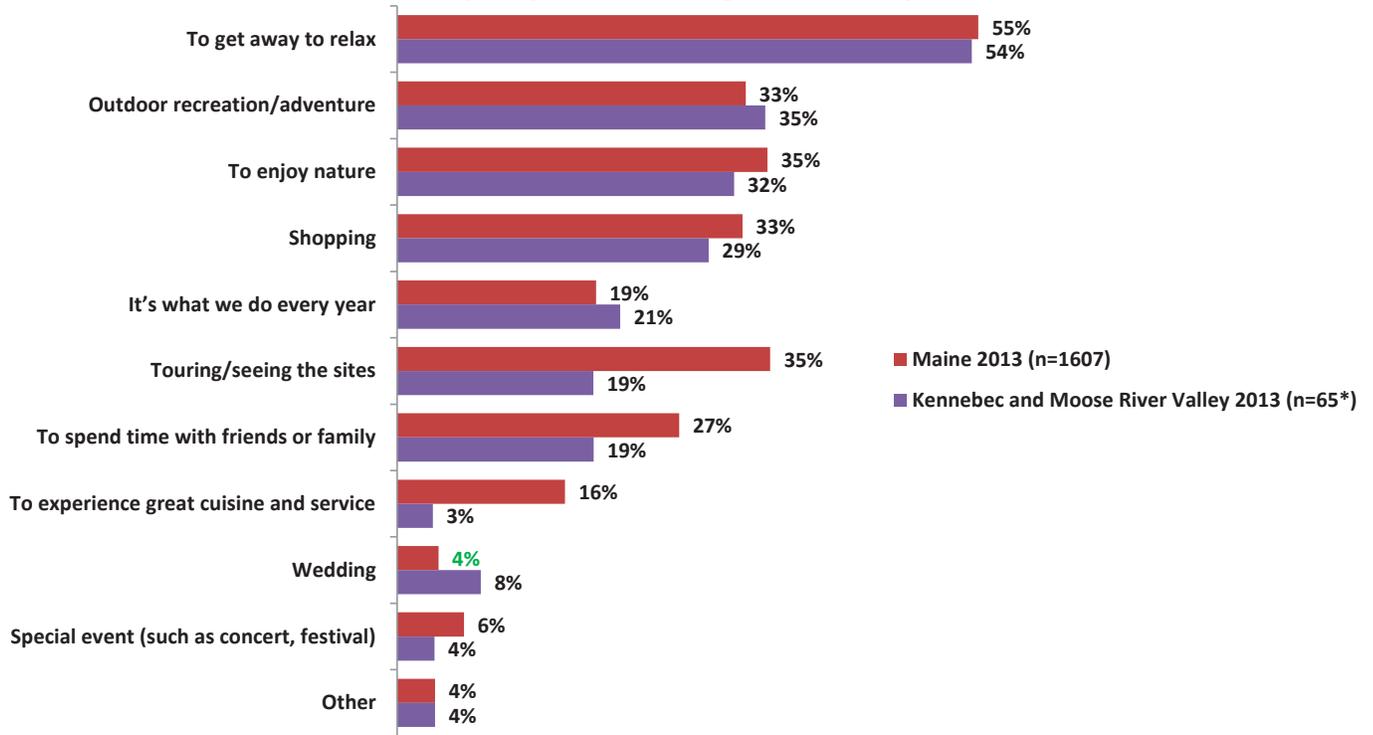
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Overnight Visitors: *Trip Experience*



Getting away to relax was the top reason leisure visitors traveled to the Kennebec & Moose River Valley.

Primary Purpose of Overnight Leisure Trips

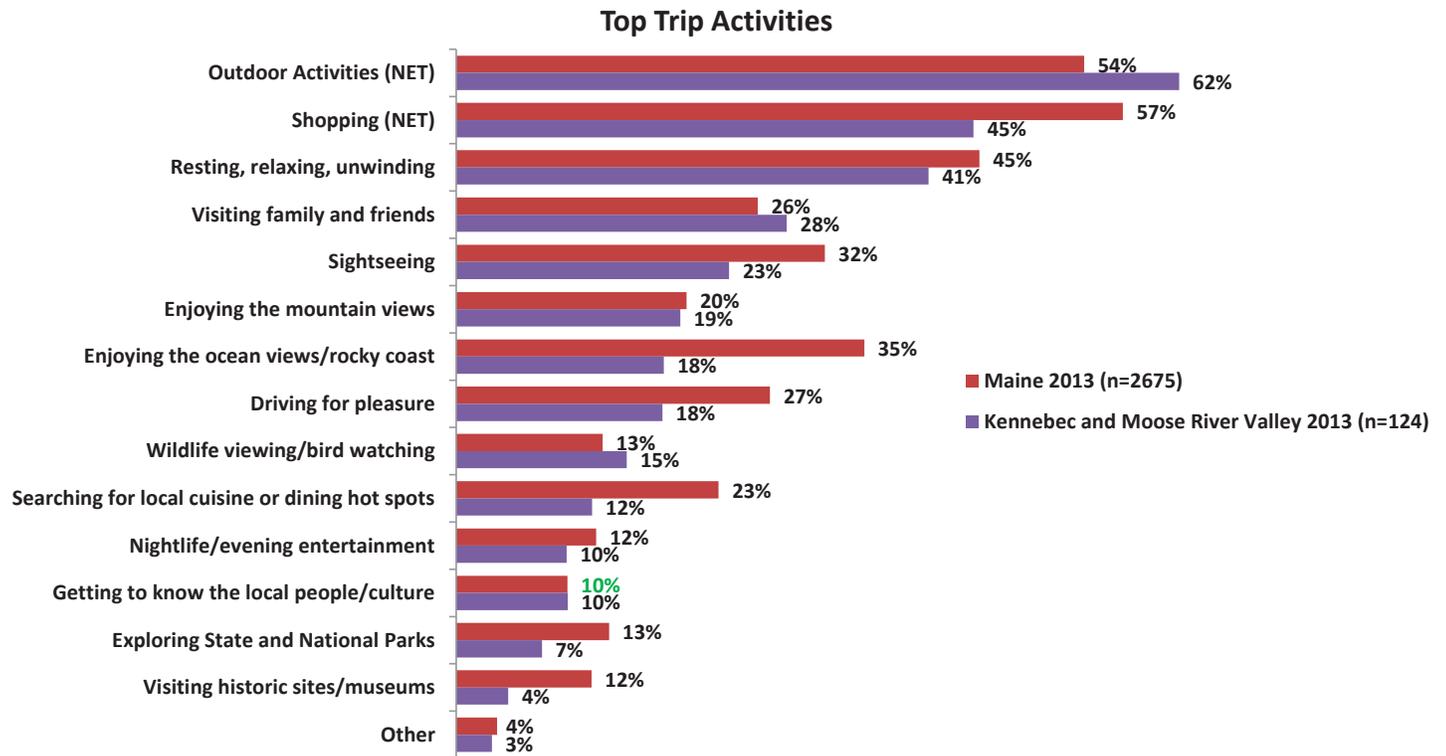


Regional Q7. What was the primary purpose of your most recent trip in Maine?

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

Various outdoor activities top the list of Kennebec & Moose River Valley visitor activities.

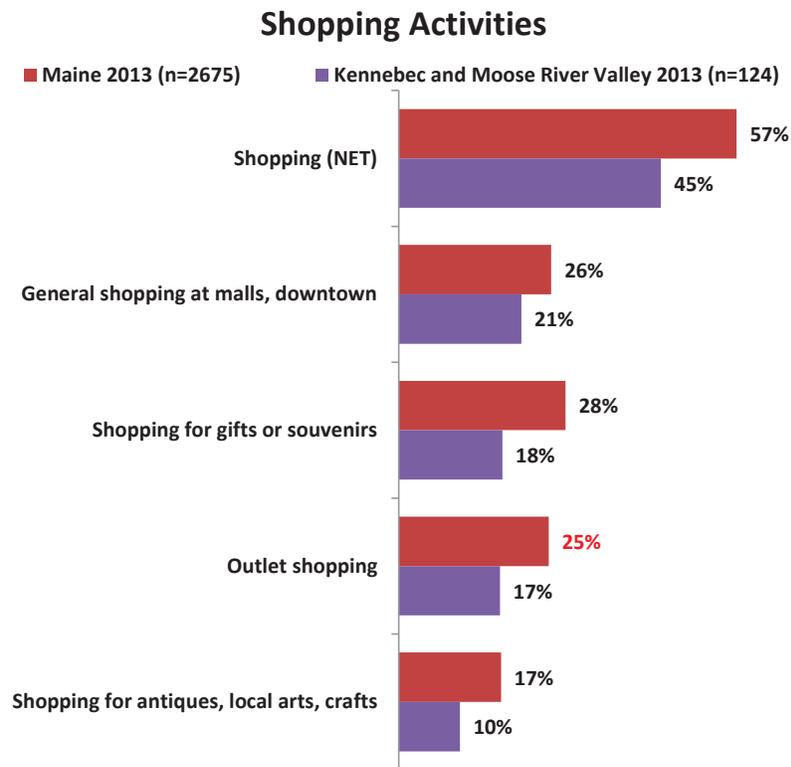
- After outdoor activities, shopping is the next most popular activity among overnight visitors to the Kennebec & Moose River Valley.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

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

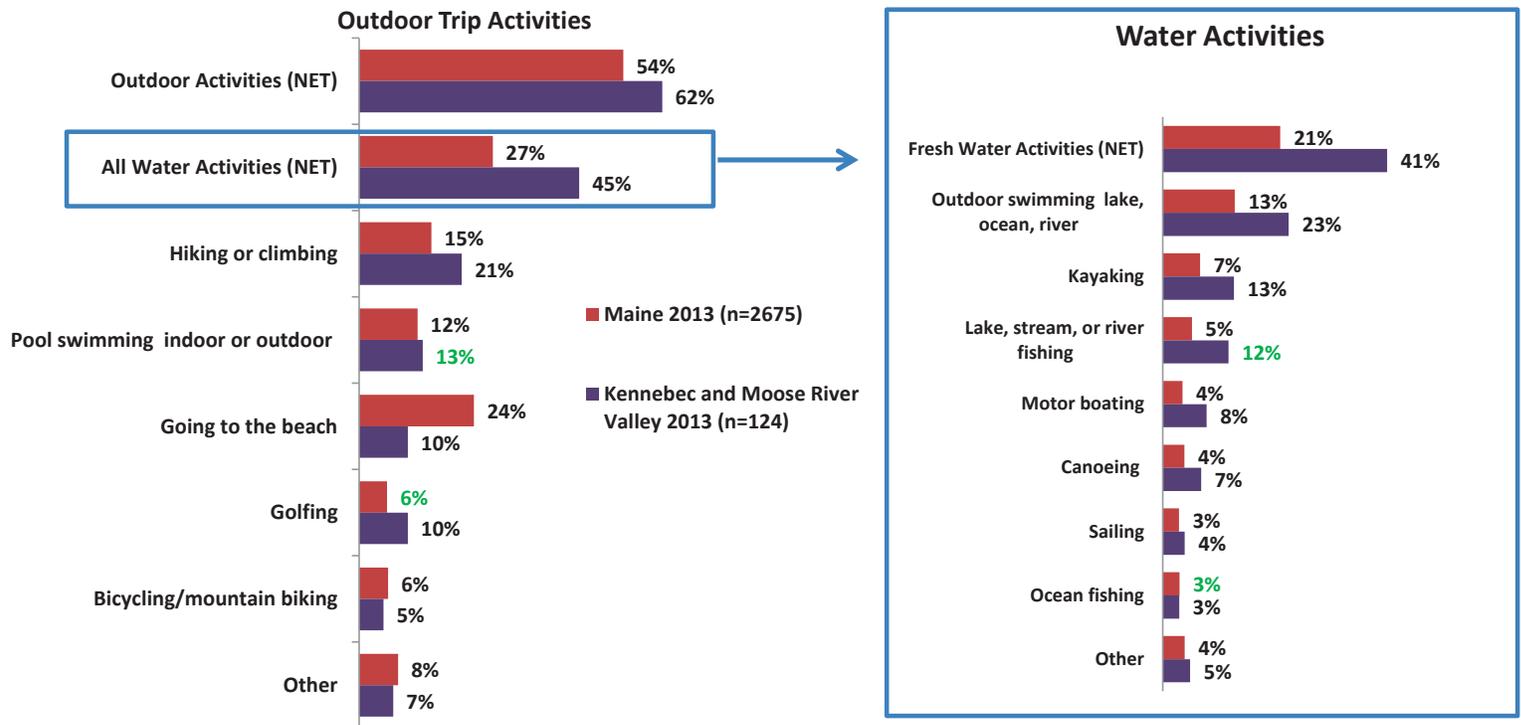
Shopping is less popular among overnight visitors to the Kennebec & Moose River Valley than to the rest of the State.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

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

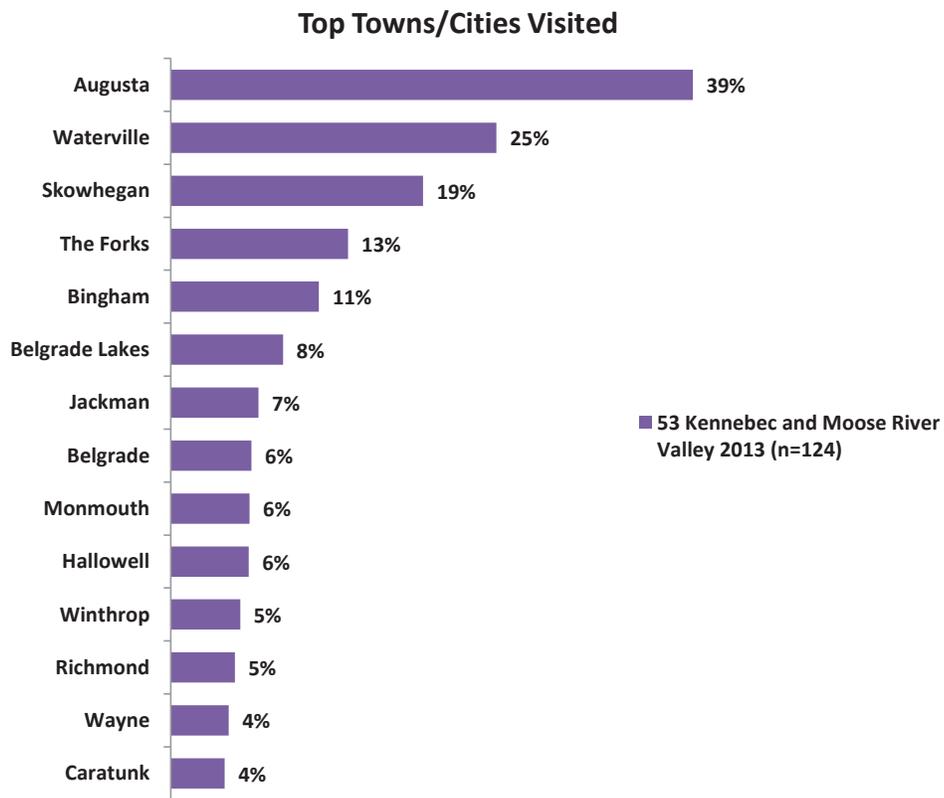
Outdoor activities in the Kennebec & Moose River Valley are primarily comprised of various water activities.



Regional Q32. In which of the following activities did you participate during this trip? (Please check all that apply).

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

Among overnight visitors to the Kennebec & Moose River Valley, Augusta is the most frequently visited town.

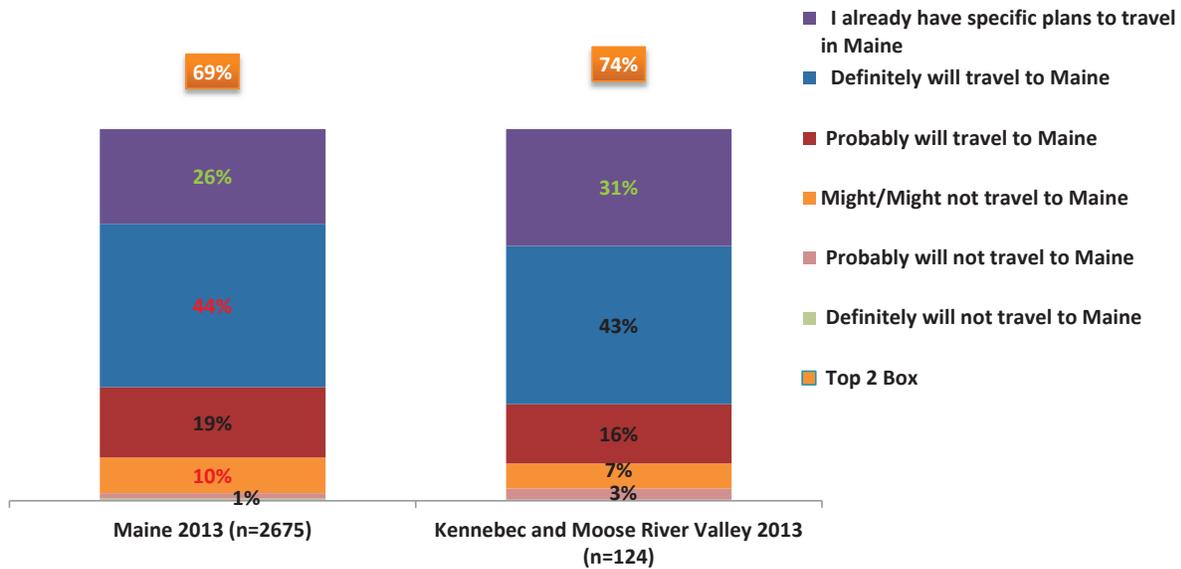


Regional Q31: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Three-fourths of overnight visitors to the Kennebec & Moose River Valley plan to visit Maine again.

- The proportion stating that they *already have specific plans to travel in Maine* (31%) has increased significantly over 2012 (15%).

Future Travel Likelihood



Regional Q37. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

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

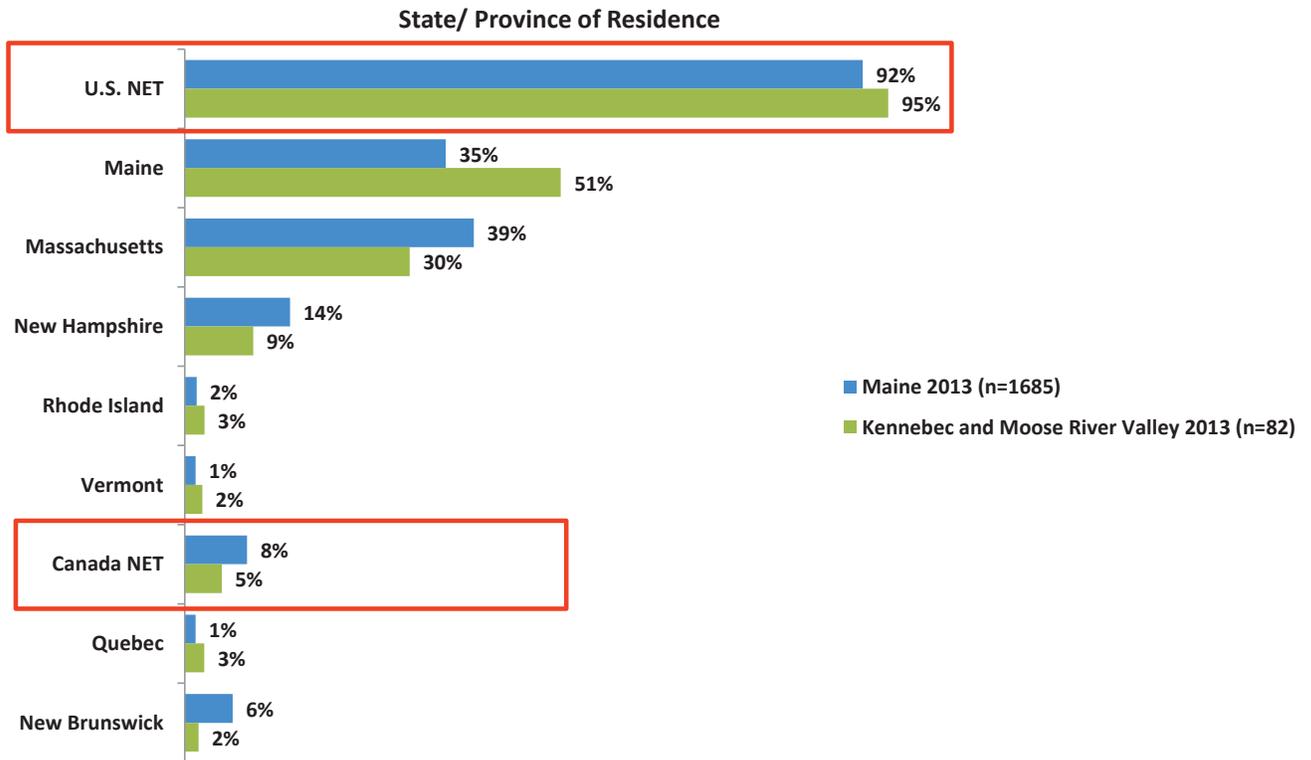
Day Visitors	Maine 2013 (n=1685)	Kennebec & Moose River Valley 2013 (n=82)
Age:		
< 35	20%	29%
35 - 44	15%	14%
45 - 54	25%	18%
55 +	40%	39%
Mean Age (Years)	49.0	46.3
Income:		
< \$50,000	19%	<29%>
\$50,000 - \$99,000	42%	39%
\$100,000 +	38%	31%
Mean Income (Thousands)	\$98,010	\$84,660
Female	54%	60%
College Degree or Higher	71%	66%
Married	66%	68%
Employed Full Time	63%	62%

<> 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 majority of day visitors to the Kennebec & Moose River Valley are in-state visitors.

- Massachusetts also sends a sizeable proportion of day visitors to this region (30%), while Canada sends very few (5%).

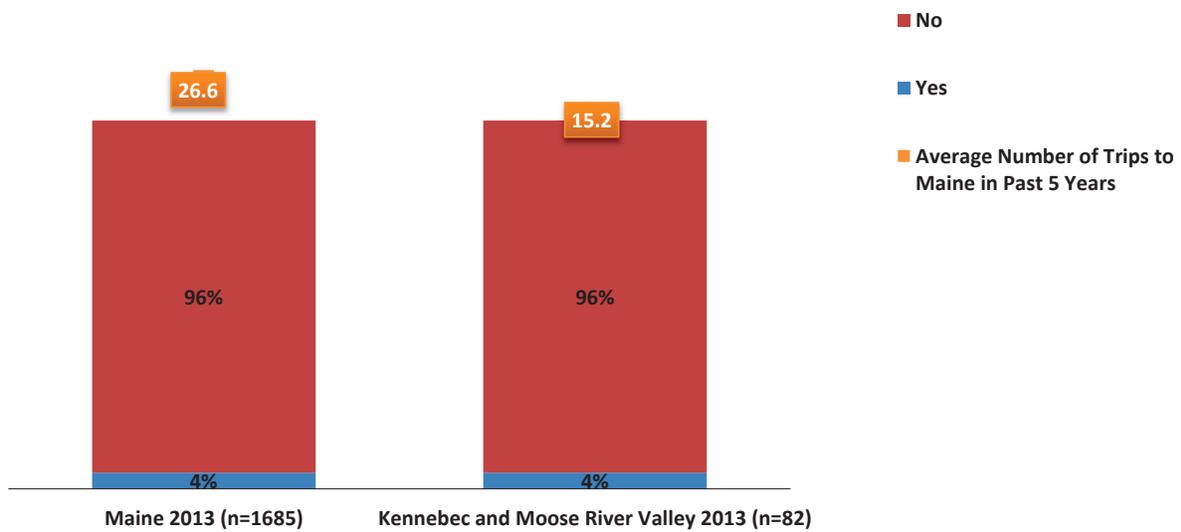


Day Q1A. In what State or Province do you reside?

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

Nearly all day visitors to the Kennebec & Moose River Valley are repeat visitors.

Repeat vs. First Time Visitors



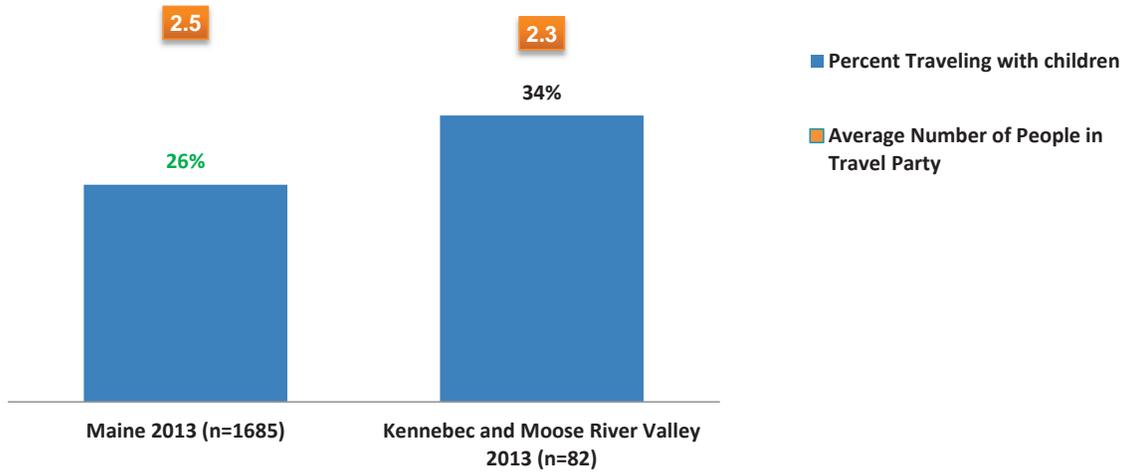
Day Q4. Was this your first trip to Maine?

Q4a. Including your most recent trip in Maine, how many times have you visited Maine in the past five years?

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

One-third of day visitors to the Kennebec & Moose River Valley are traveling with children.

Travel Party Composition



Q7. Including yourself and any children, how many people were in your immediate travel party on this trip?

Q8. How many of these people were: Children

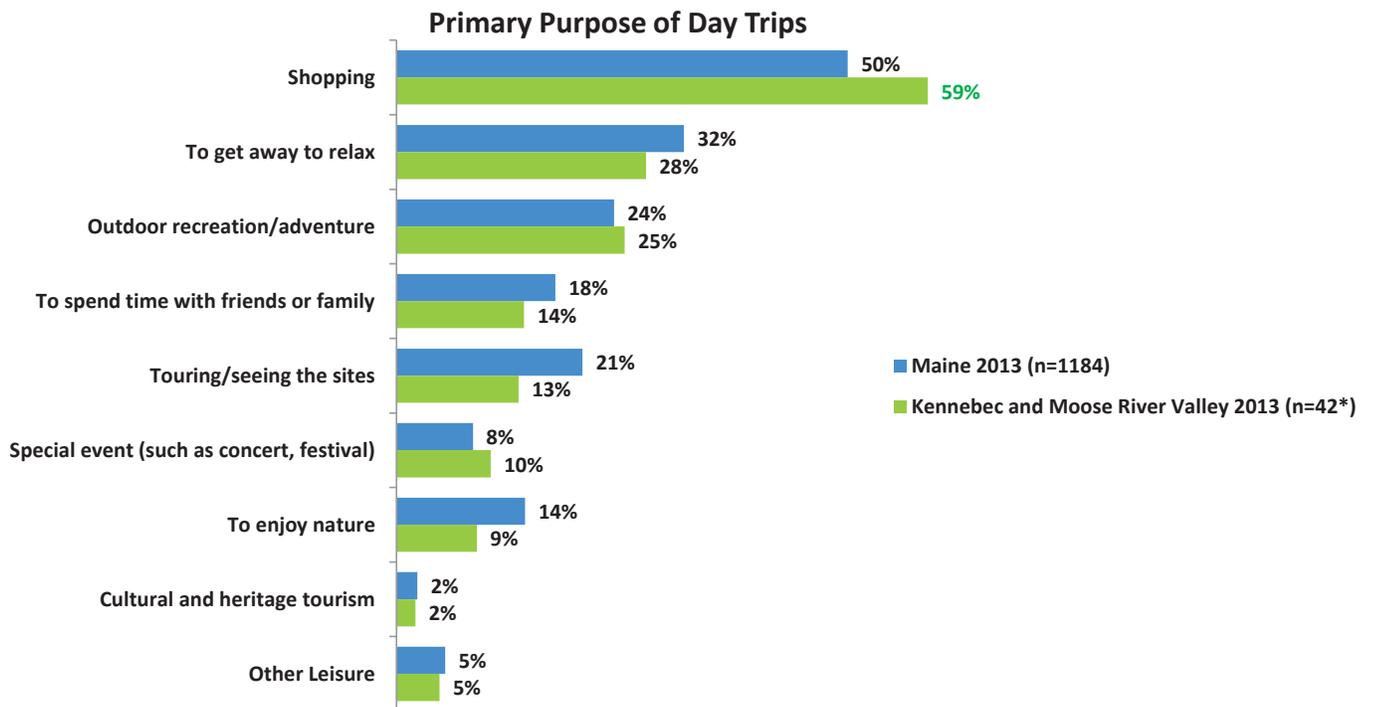
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Day Visitors: *Trip Experience*



Unlike overnight visitors, most day visitors to the Kennebec & Moose River Valley came primarily to shop.

- Getting away to relax and outdoor recreation were the next most cited reasons for visiting.

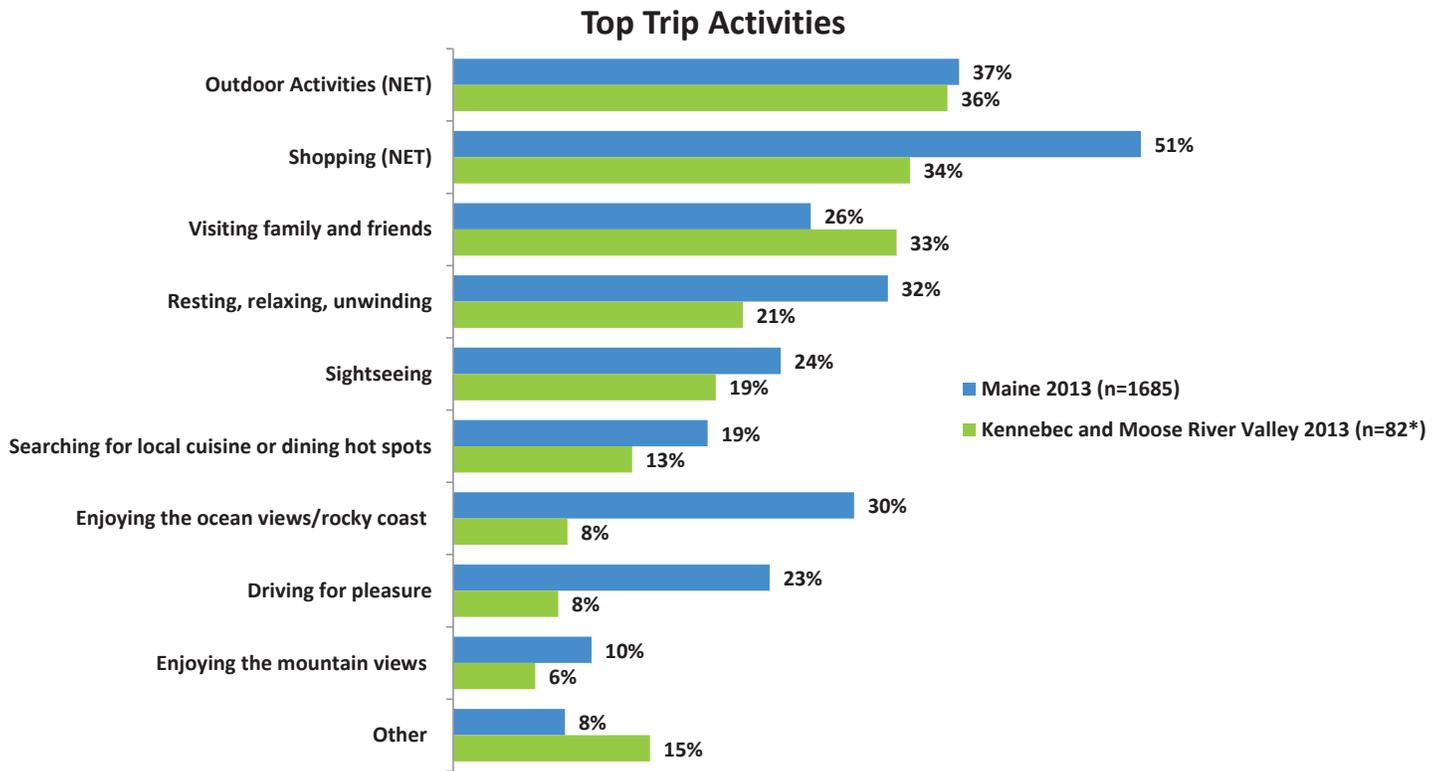


Day Q3. What was the primary purpose of your most recent trip in Maine?

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

Similar proportions of day visitors shopped, participated in outdoor activities and visited with family/friends while here.

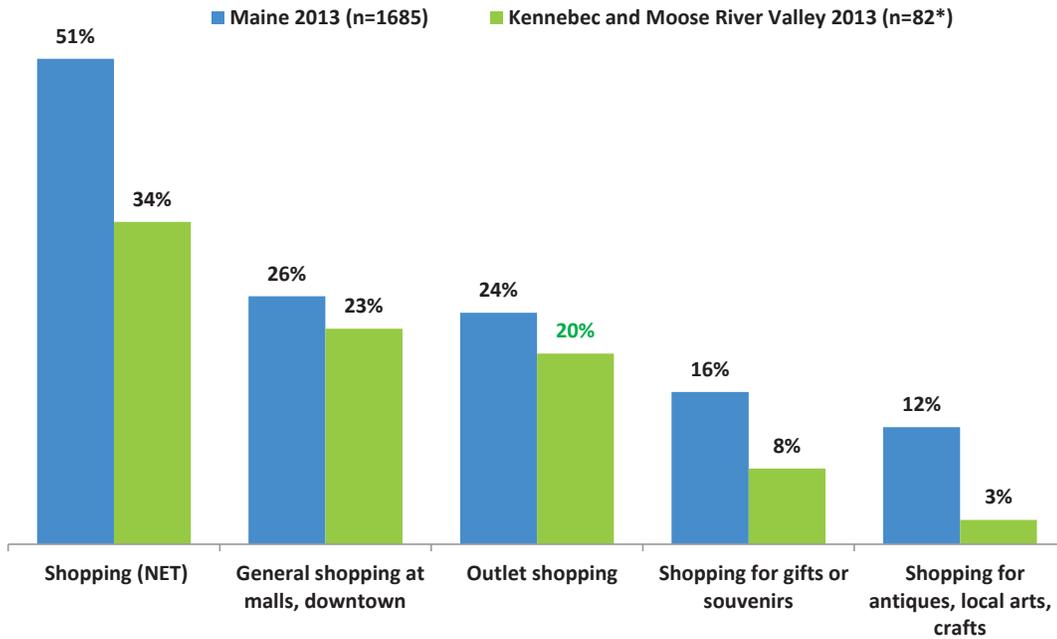
- The proportion of day visitors to the Kennebec & Moose River Valley that shopped while visiting is significantly lower than for the State of Maine as a whole.



Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

General mall/downtown shopping and outlet shopping were the most frequently cited shopping activities.

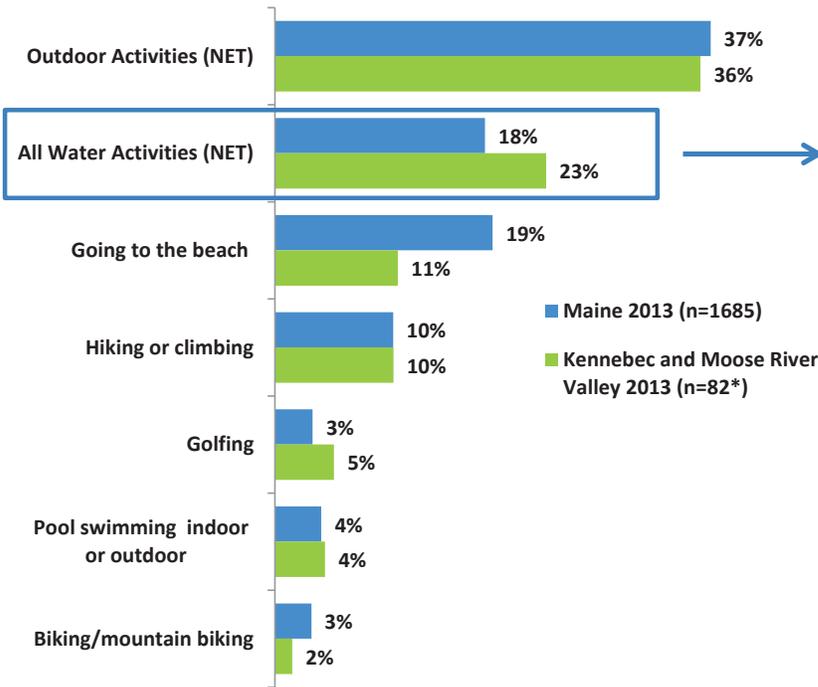
Shopping Activities



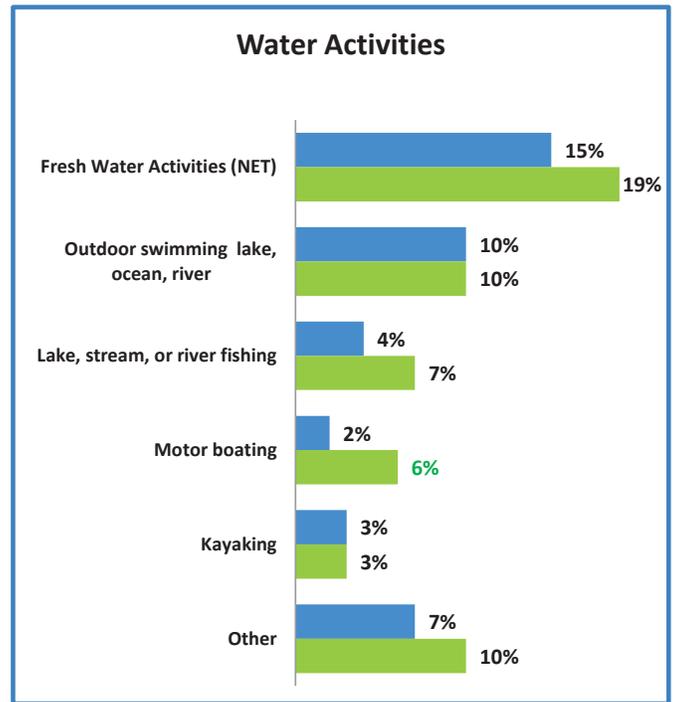
Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Among day visitors participating in outdoor activities, most participate in some type of water activity.

Outdoor Activities



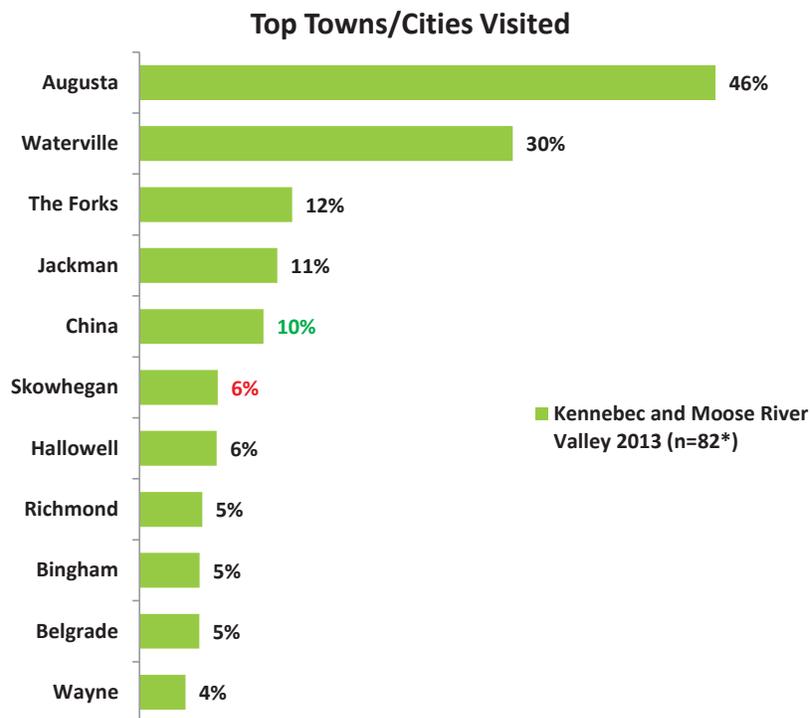
Water Activities



Day Q10. In which of the following activities did you participate during your most recent trip to Maine? (Please check all that apply).
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Like overnight visitors, day visitors to this region are most likely to visit Augusta.

- As compared to 2012, the proportion visiting China has increased (10% versus 2% in 2012), while the proportion visiting Skowhegan has decreased (6% versus 24% in 2012).

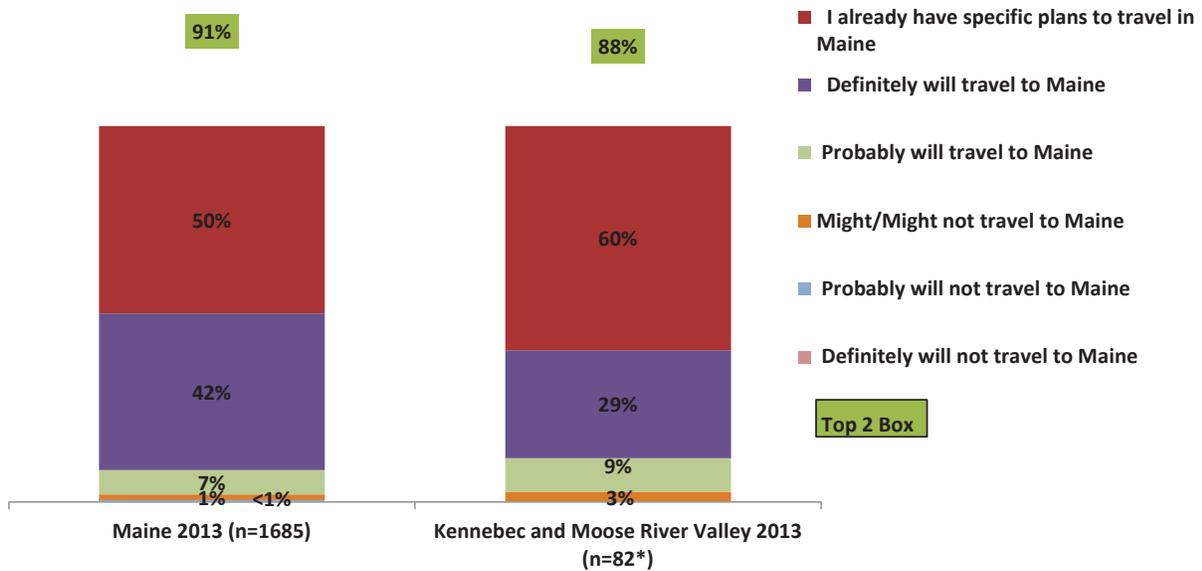


Day Q12: Within the region you visited, what specific towns or cities did you visit?

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

Nine in ten day visitors to the Kennebec & Moose River Valley plan to visit Maine again in the future.

Future Likelihood to Travel to Maine



Day Q19. How likely will you be to travel in Maine in the future/take a day trip in Maine in the future?

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

Comparison of *Kennebec and Moose River Valley* Visitors to Maine Visitors



Comparisons

- Visitors to the Kennebec & Moose River Valley region and visitors to the State of Maine as a whole differ in a few areas. These variations can be seen primarily in the activities that visitors participate in while visiting.
- Popular trip activities and stated purpose of trips closely follow the outdoor and nature-oriented environment available in the Kennebec & Moose River Valley.
- Highlights:
 - **Visitor Origin**
 - A **greater proportion** of day visitors from **Maine**.
 - A **greater proportion** of overnight visitors from **New England**.
 - A **lesser proportion** of overnight visitors from **Canada, particularly Ontario**.
 - **Visitor Demographics**
 - A **greater proportion** of day visitors earning **less than \$50,000**, and a lower average annual household income overall.
 - **Primary Purpose of Trip**
 - Overnight and day visitors **less** likely to be visiting for **touring/seeing the sites**.
 - Overnight visitors **less** likely to be visiting to **experience great cuisine**.

Comparisons

- Highlights Continued:

- Trip Activities – Overnight Visitors

- More likely to be:

- Water activities
- Fresh water activities
- Outdoor swimming
- Kayaking
- Fishing

- Less likely to be:

- Shopping (**day visitors also**)
- Sightseeing
- Enjoying the ocean views (**day visitors also**)
- Driving for pleasure (**day visitors also**)
- Searching for local cuisine
- Exploring State and National Parks
- Visiting historic sites/museums
- Going to the beach (**day visitors also**)



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