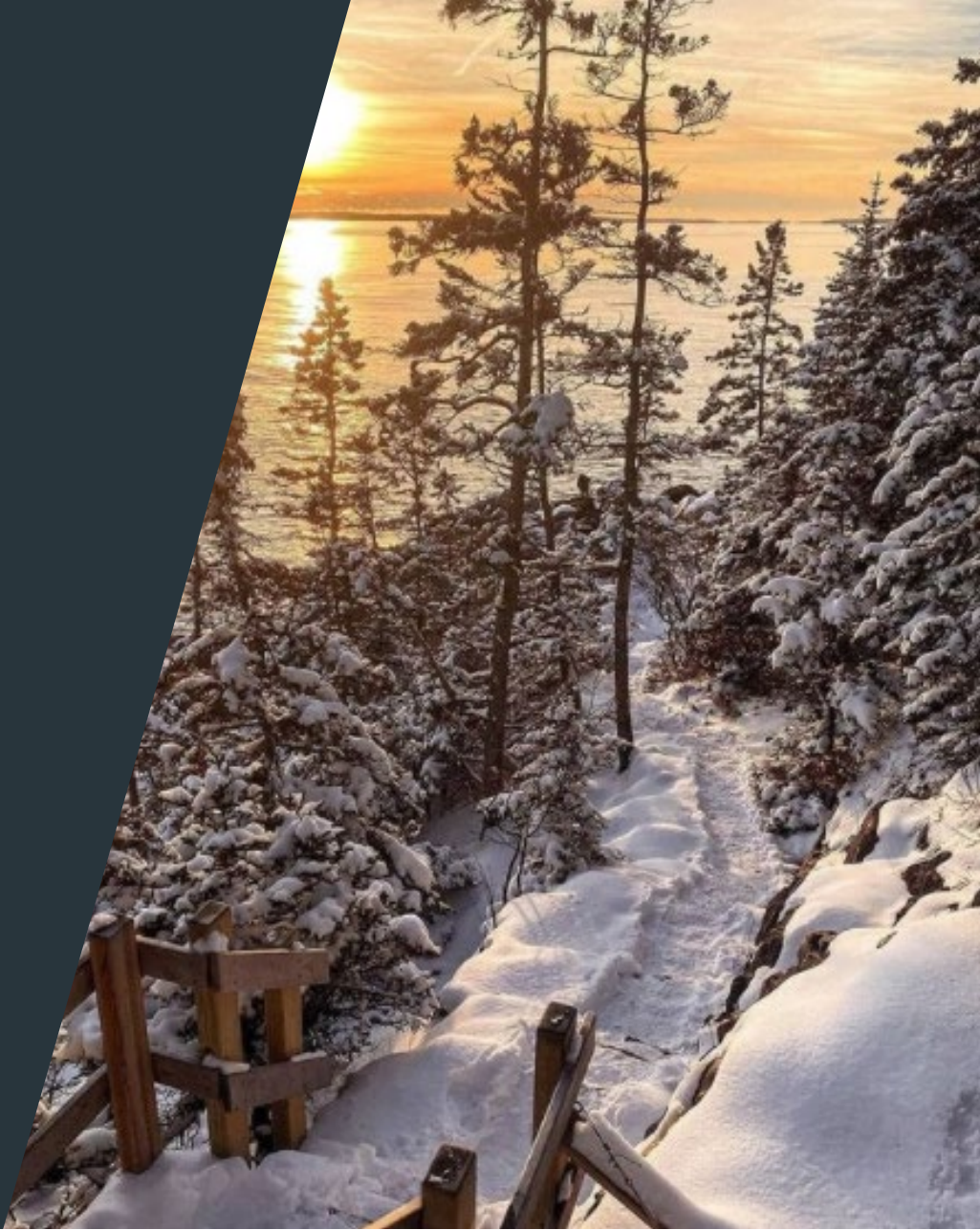


MAINE OFFICE OF TOURISM

Winter Visitor Tracking Report
December 2020 – April 2021



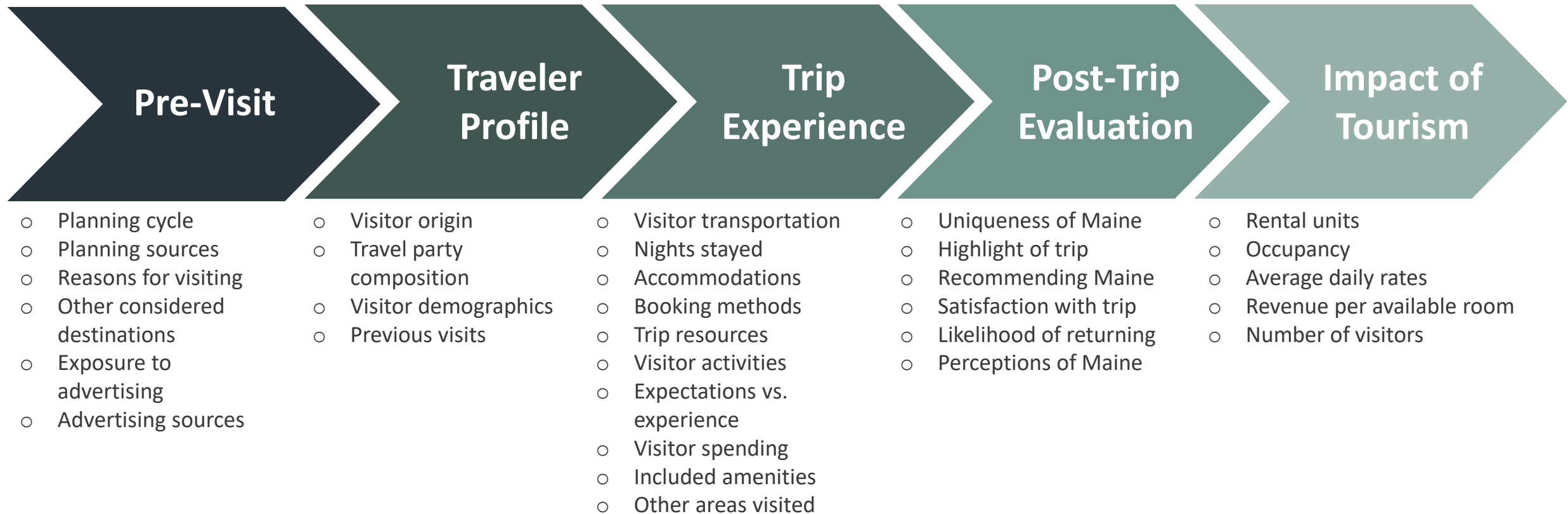
INTRODUCTION



STUDY OBJECTIVES – VISITOR JOURNEY

This report presents the information about visitors to Maine during December 2020 to April 2021.

In the report, we follow the visitors in their journeys from pre-trip planning to the impact of their expenditures in the state. Along the way, we examine profiles of visitors, their experiences in our destination, and how they evaluate experiences in Maine.

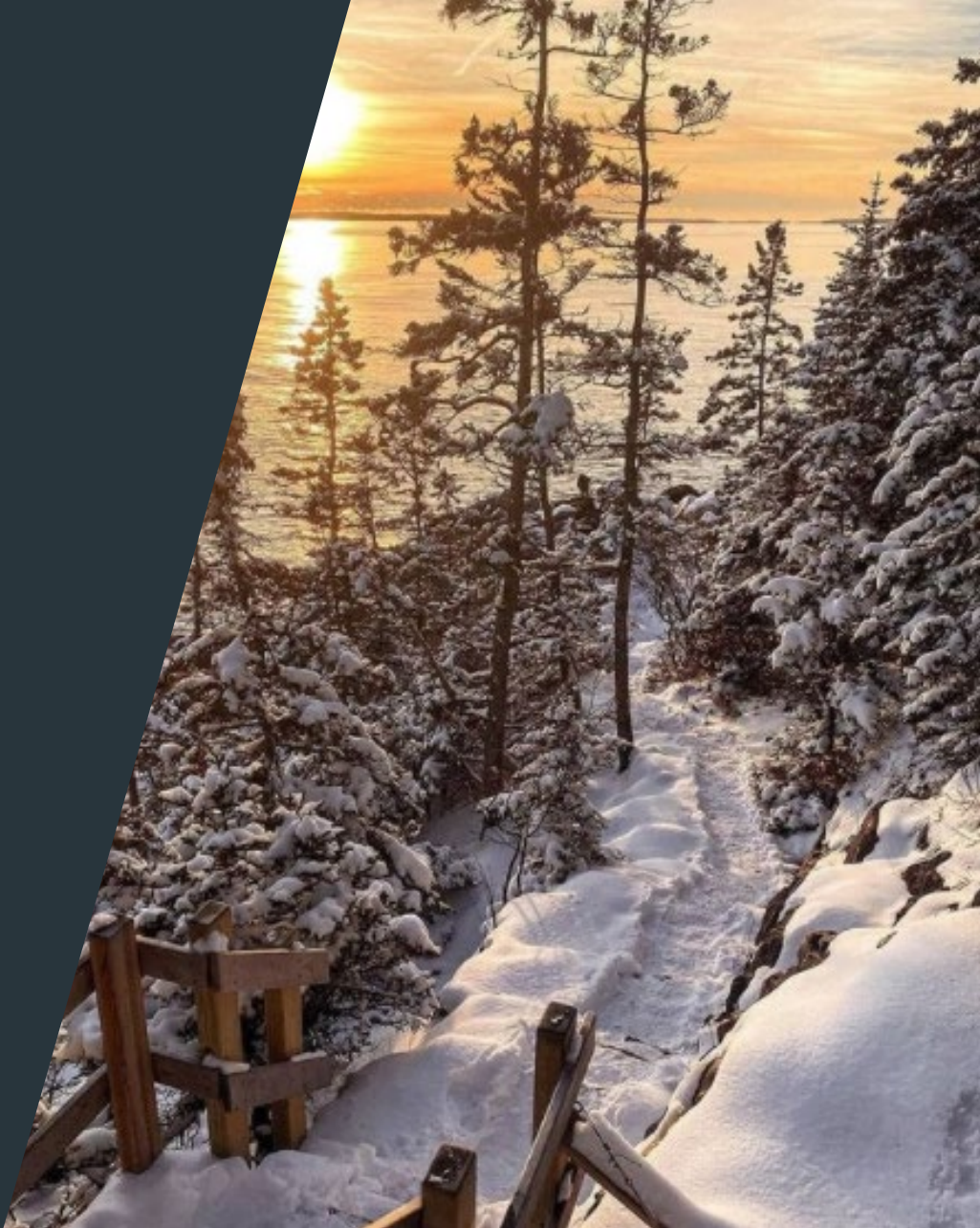




Visitor Tracking

1,025 interviews were completed with visitors to the State of Maine online and in-person at local attractions, parks, hotels, and events between December 1st, 2020 and April 30th, 2021.

EXECUTIVE SUMMARY



TRIP PLANNING CYCLE : IMPACT OF TOURISM



DECEMBER 2020 – APRIL 2021 LODGING PROFILE

Accommodation Metrics ¹	<i>Hotels</i>	<i>Vacation Rentals</i>	<i>Other Rentals</i>	<i>Total</i>
<i>Occupancy</i>	40.9%	17.3%	13.0%	27.0%
<i>ADR</i>	\$94.50	\$114.57	\$31.19	\$89.30
<i>RevPAR</i>	\$38.65	\$19.82	\$4.05	\$24.11

	<i>Maine Residents</i>	<i>Out-of-State Visitors</i>	<i>Total</i>
<i>December 2020 – April 2021 Visitors</i>	983,200	1,901,000	2,884,200²
<i>December 2020 – April 2021 Visitors (%)</i>	34.1%	65.9%	100%

¹ Accommodation metrics are estimated with data from STR, Key Data, and Downs & St. Germain Research.

² Visitation estimates provided here are **preliminary** and reflect visitation from December 2020 through April 2021.

Adjustments will be made to these estimates at the end of the year, to account for seasonal fluctuations.

2020 VS. 2021 KEY METRICS

Key Metrics ¹	<i>December 2019 – April 2020</i>	<i>December 2020 – April 2021</i>	<i>% Change</i>
<i>Number of Visitors</i>	<i>3,034,500</i>	<i>2,884,200</i>	<i>-5.0%</i>
<i>Occupancy</i>	<i>28.5%</i>	<i>27.0%</i>	<i>-5.3%</i>
<i>ADR</i>	<i>\$91.26</i>	<i>\$89.30</i>	<i>-2.1%</i>
<i>RevPAR</i>	<i>\$26.01</i>	<i>\$24.11</i>	<i>-7.3%</i>

¹ Accommodation metrics are estimated with data from STR, Key Data, and Downs & St. Germain Research.

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » **Over half** of visitors started planning their trip in Maine less than a month in advance
- » **Over 3 in 5** visitors booked their trip/decided to visit Maine less than a month in advance



TOP ONLINE TRIP PLANNING SOURCES*

Just over half of visitors used online sources to plan their trip. The top planning sources used by visitors are below:



20% Online search engines



10% Online travel agency



10% Hotel websites



9% Facebook

*Multiple responses permitted.

TOP OFFLINE TRIP PLANNING SOURCES*



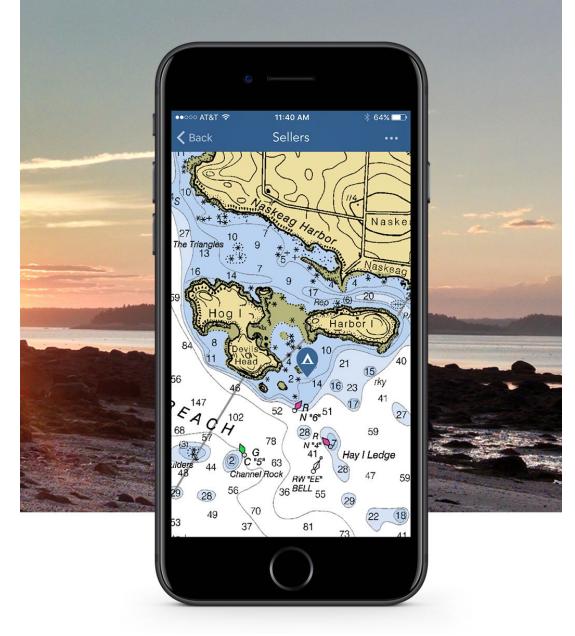
31% Advice from friends/family



7% Travel guides & brochures



6% Travel books & magazines



6% Travel planning apps

*Multiple responses permitted.

TOP REASONS FOR VISITING*



33% Visiting
friends/relatives



21% Relax and unwind



17% Snow activities

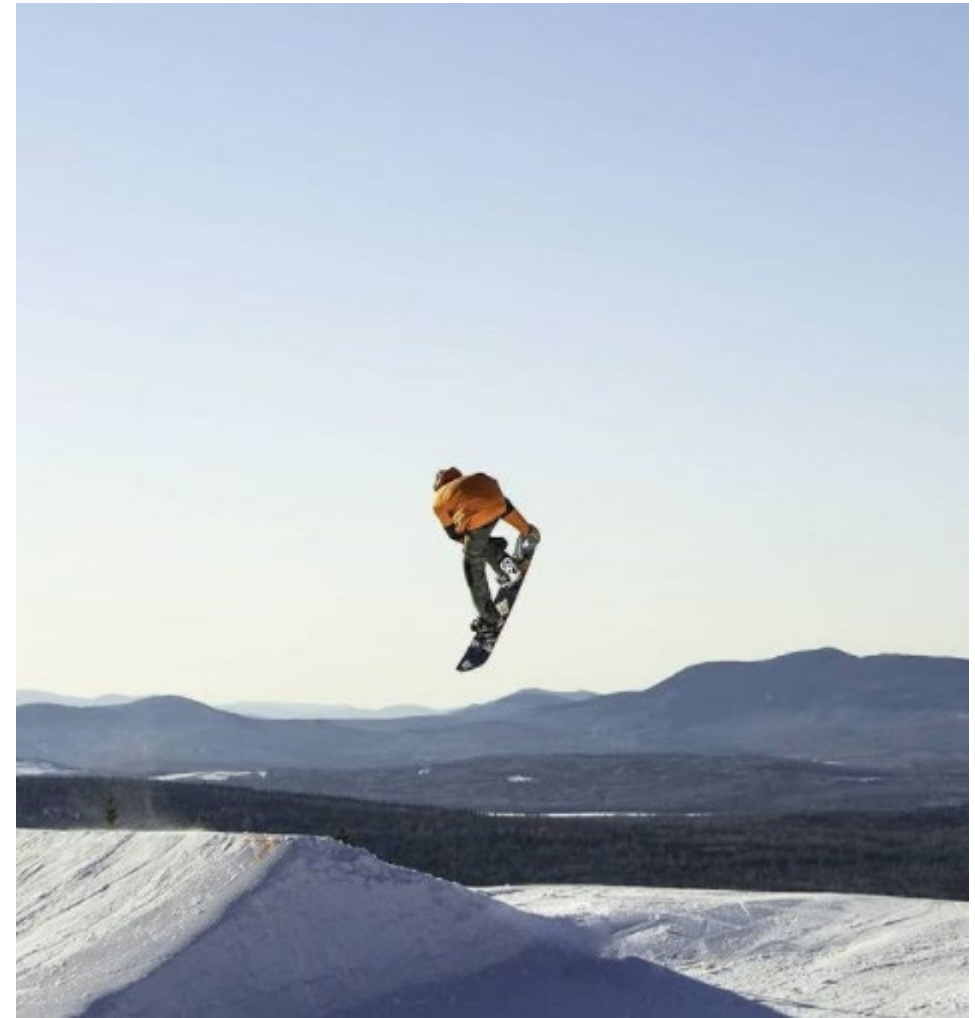


13% Shopping

*Up to three responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » **Nearly 3 in 4** visitors did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip
- » **Over 1 in 8** visitors considered visiting New Hampshire



PRE-TRIP EXPOSURE TO ADVERTISING

- » **Nearly 1 in 3** visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip



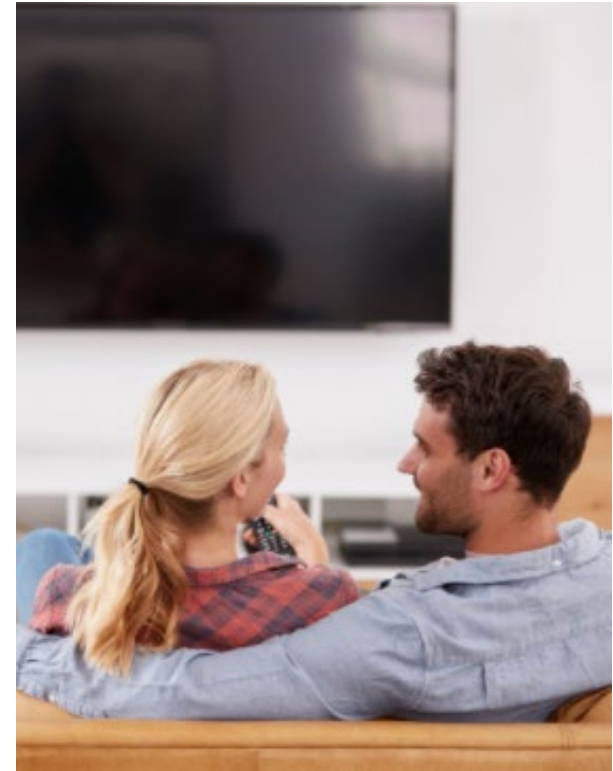
TOP SOURCES OF ADVERTISING EXPOSURE*



39% Social media



32% Internet



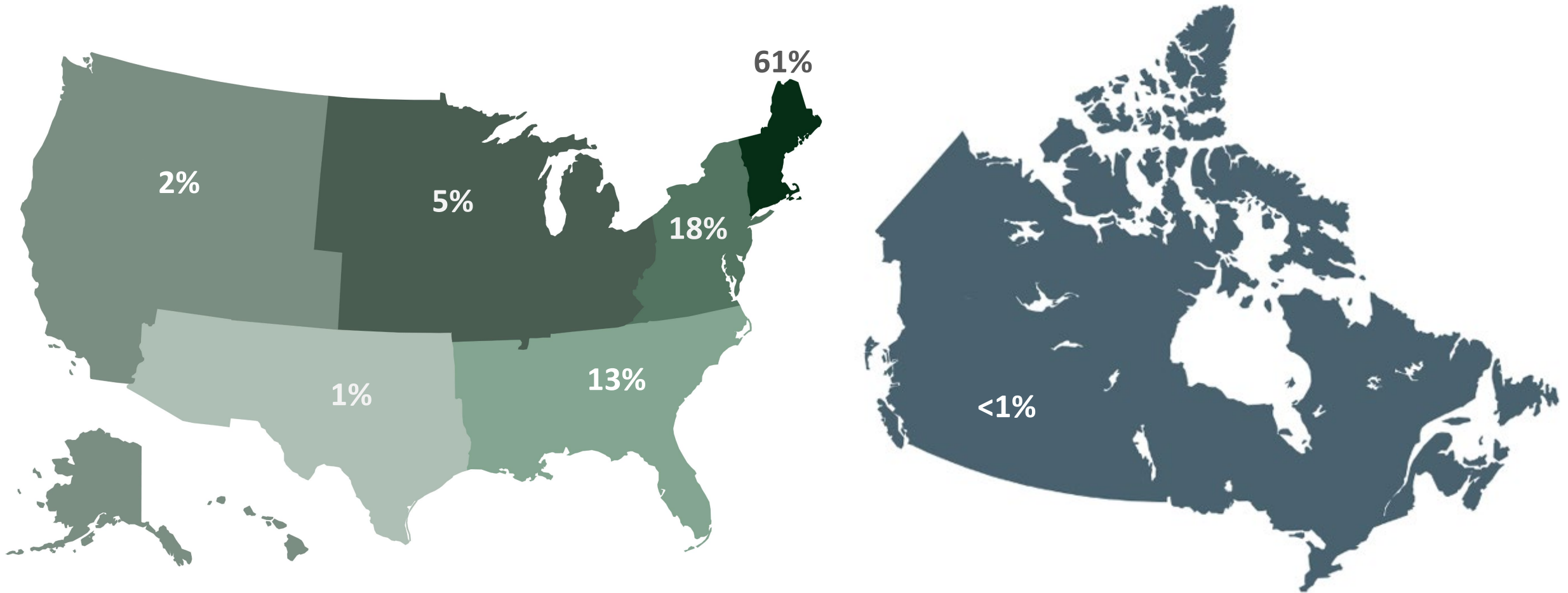
20% Cable or satellite
television

*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN



<1% of visitors traveled to Maine from outside of the U.S. and Canada.

TOP ORIGIN STATES & PROVINCES



68%

of visitors traveled from 6 U.S. states,
including from other regions of Maine.



Maine (34%)



Massachusetts (11%)



New Hampshire (9%)

Pennsylvania (5%)

North Carolina (5%)

Florida (4%)

TOP ORIGIN MARKETS



8% Boston, MA



6% Washington DC –
Baltimore



4% New York City¹

¹ Metro area includes counties in New Jersey, Pennsylvania, and Connecticut.

TRAVEL PARTIES

The typical Maine visitor traveled with **2.2** people in their visitor party



1 in 7 visitors traveled with at least one person under the age of 18 in their travel party



VISITOR PROFILE



51% Male



59% College/technical graduate



61% Married/domestic partnership



54% Employed full-time



88% White/Caucasian



\$78,900 annual household income

VISITOR PROFILE: DAY TRIPPERS

- » The typical day tripper¹:
 - » Earned **\$68,300** per year
 - » Did not have a college/technical degree **(57%)**
 - » Was married or living with their partner **(56%)**
 - » Was employed full-time **(53%)**
 - » Was White/Caucasian **(91%)**
 - » **12%** traveled with children
 - » Was from Maine **(68%)** and other U.S. states in New England **(28%)**



¹ Did not stay overnight in Maine during their Winter trip.

VISITOR PROFILE: OVERNIGHT VISITORS

- » The typical overnight visitor¹:
 - » Earned **\$82,900** per year
 - » Had at least a college/technical degree **(59%)**
 - » Was married or living with their partner **(62%)**
 - » Was employed full-time **(54%)**
 - » Was White/Caucasian **(86%)**
 - » **15%** traveled with children
 - » Was from a state other than Maine in New England **(25%)**, the Mid-Atlantic **(24%)** or Maine **(23%)**



¹ Stayed one or more nights in Maine during their Winter trip.

NEW & RETURNING VISITORS

- » **1 in 10** visitors were traveling in Maine for the first time
- » **Nearly half** of visitors had previously traveled in Maine more than 10 times



LENGTH OF STAY

	Winter 2020	Winter 2021
Average Length of Stay	3.9	5.3
Day tripper	32%	28%
1 – 2 nights	26%	19%
3 – 4 nights	22%	21%
5+ nights	20%	33%

DIVERSITY

Ethnicity/Race	Winter 2020	Winter 2021
White	89%	88%
Asian	4%	3%
Black	3%	5%
Hispanic	2%	3%
Indigenous	1%	1%
Other	1%	0%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **92%** of visitors drove to their Maine destination
- » **3%** of visitors flew to Maine through Portland International Jetport and **2%** flew through Bangor International Airport



NIGHTS STAYED

- » **72%** of visitors spent one or more nights in Maine
- » Typical visitors stayed **5.3** nights in Maine on their trip



TOP ACCOMMODATIONS



28% Friends/family home



28% Did not stay overnight



22% Hotel/motel/resort



9% Personal condo, house,
timeshare



4% B&B/Inn



4% Rental condo, house

TOP IN-MARKET VISITOR RESOURCES*



23% Navigation websites/apps



13% Restaurant website/apps



11% Visitor Information Centers

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



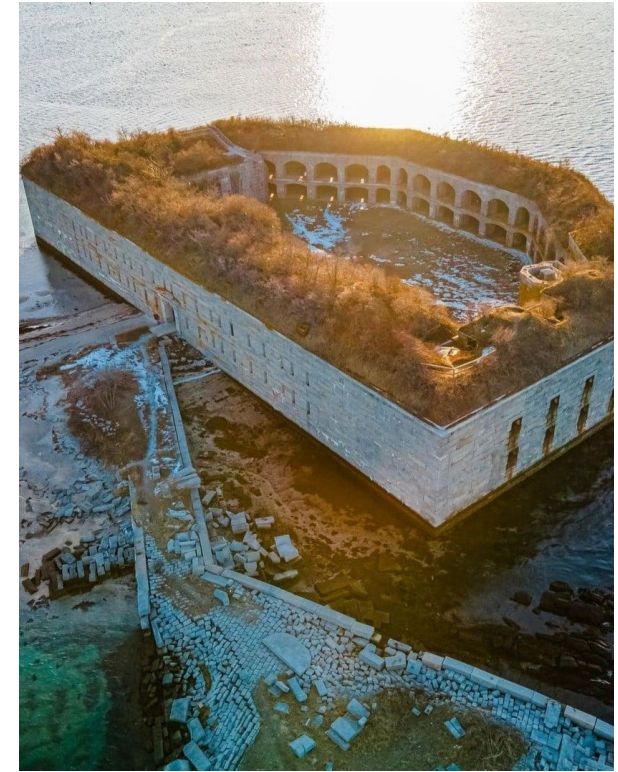
59% Food/beverage/
culinary



42% Active outdoor
activities



40% Shopping



35% Touring/sightseeing

*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Overnight visitors in paid accommodations
 - » \$ 542 per day
 - » \$2,983 during their trip
- » Overnight visitors in unpaid accommodations
 - » \$ 231 per day
 - » \$1,848 during their trip
- » Day trippers
 - » \$192 during their trip



VISITING OTHER STATES & PROVINCES

- » **9 in 10** visitors did not visit any other U.S. state or Canadian province on their trip to Maine
- » **1 in 10** visitors also visited New Hampshire or Massachusetts on their trip



TRAVELING WITHIN MAINE

- » **Half** of visitors traveled to regions other than their primary destination during their trips to Maine

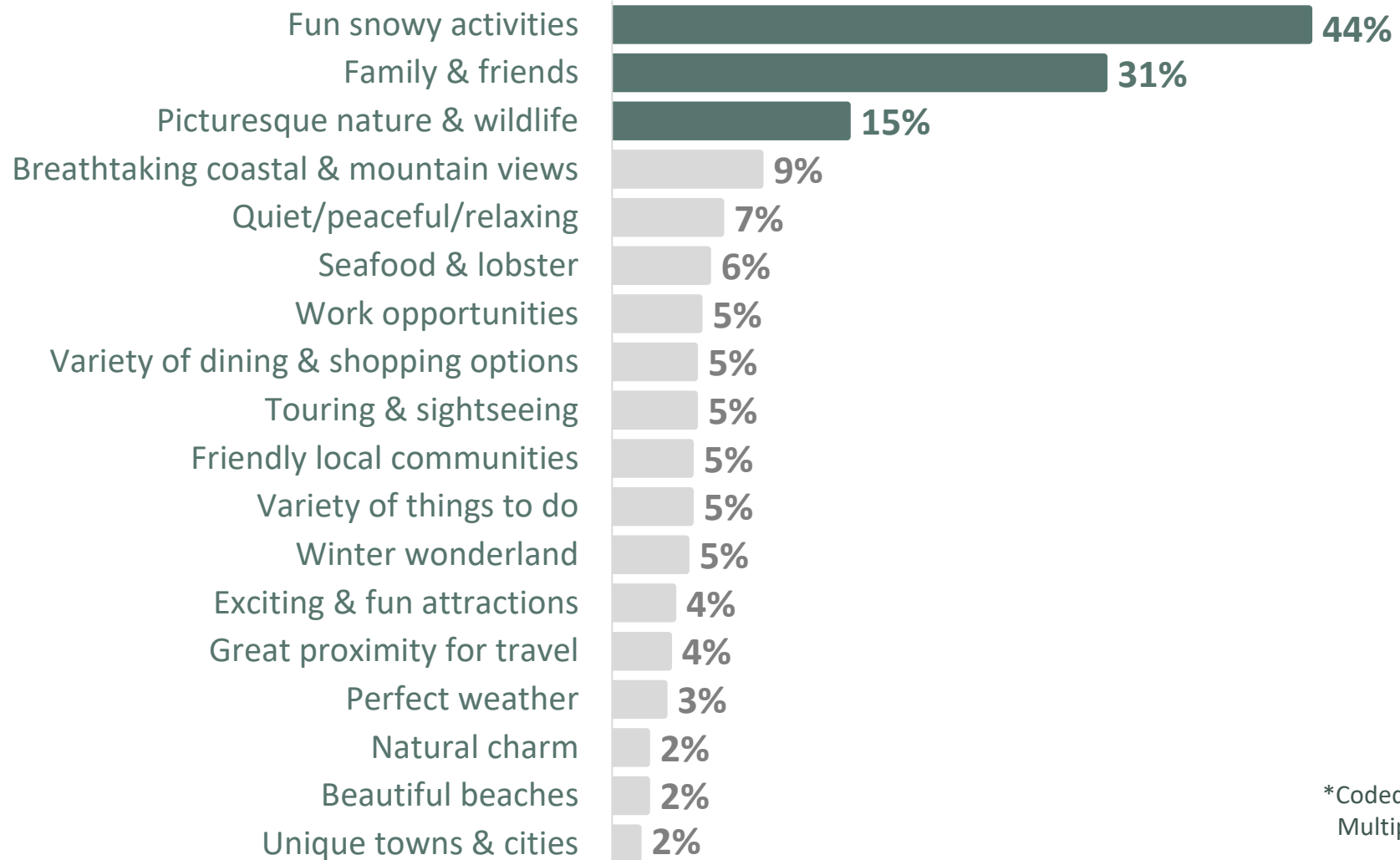


TRIP PLANNING CYCLE : POST-TRIP EVALUATION



MAINE AS A UNIQUE DESTINATION*

“What does Maine offer that other similar destinations do not offer?”



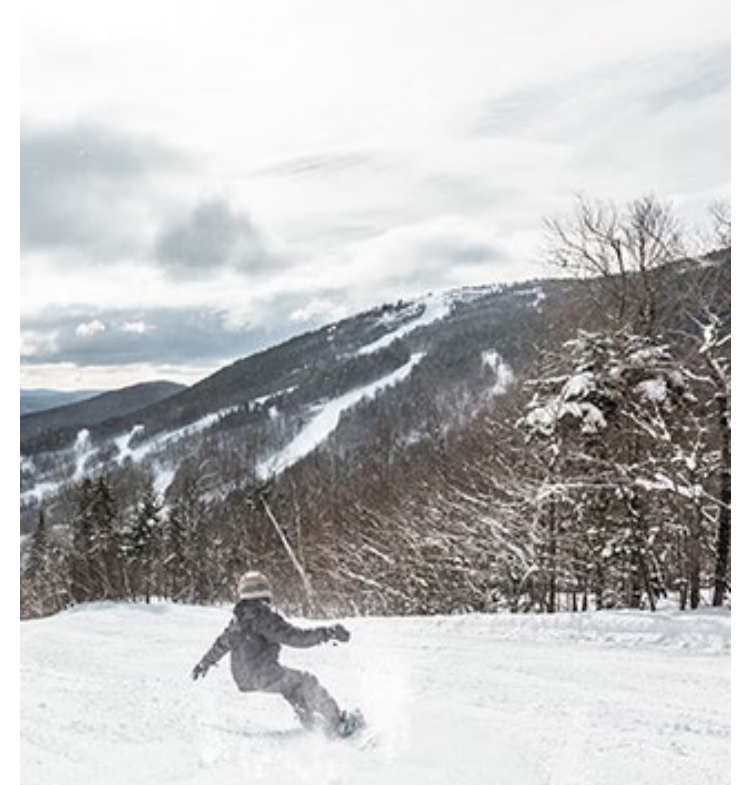
*Coded open-ended responses.
Multiple responses permitted.

UNIQUENESS: “FUN SNOWY ACTIVITIES”

“We come here every winter for snowmobiling. Only Northern Maine has the best trails.”



“Access and short lines for skiing, beauty and nature.”



“Countryside and places to snowboard.”

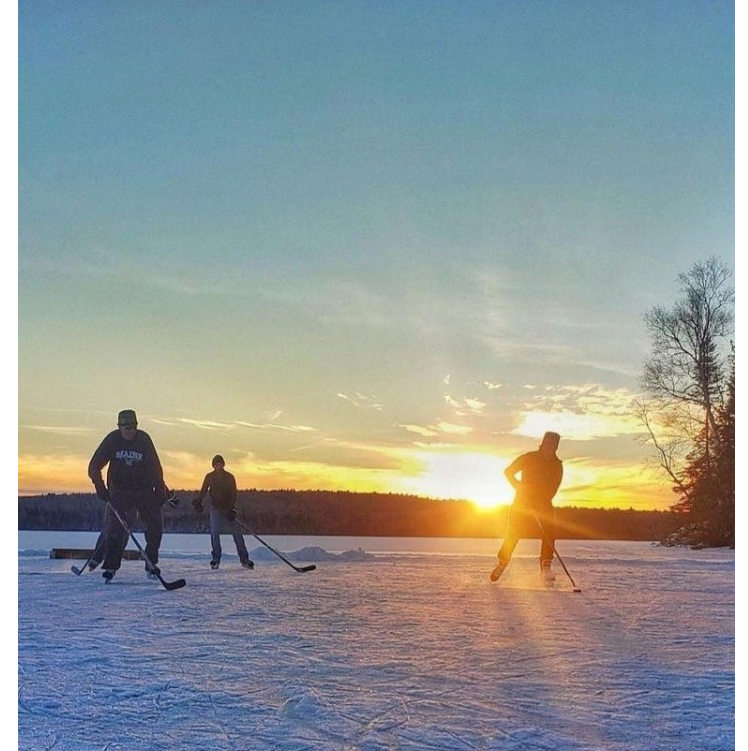


UNIQUENESS: “FAMILY AND FRIENDS”

“We come up here for a family reunion and riding snowmobiles.”



“We wanted to have the kids spend Christmas with their grandparents.”



“Been coming up here with my buddies the last few years. It is a great and fun time for us.”

UNIQUENESS: “PICTURESQUE NATURE & WILDLIFE”

“Even during a pandemic you can still access nature.”



“Trails for nature lovers that are kept super clean.”



“A lot of woods, nature, lakes, informal people that are wonderfully independent and comfortable.”



TOP TRIP HIGHLIGHTS*



Spend time with friends & family

"Celebrating my sister's upcoming wedding."

"Sitting around a crackling fire with friends and a beer."

Skiing/snowmobiling/snowshoeing

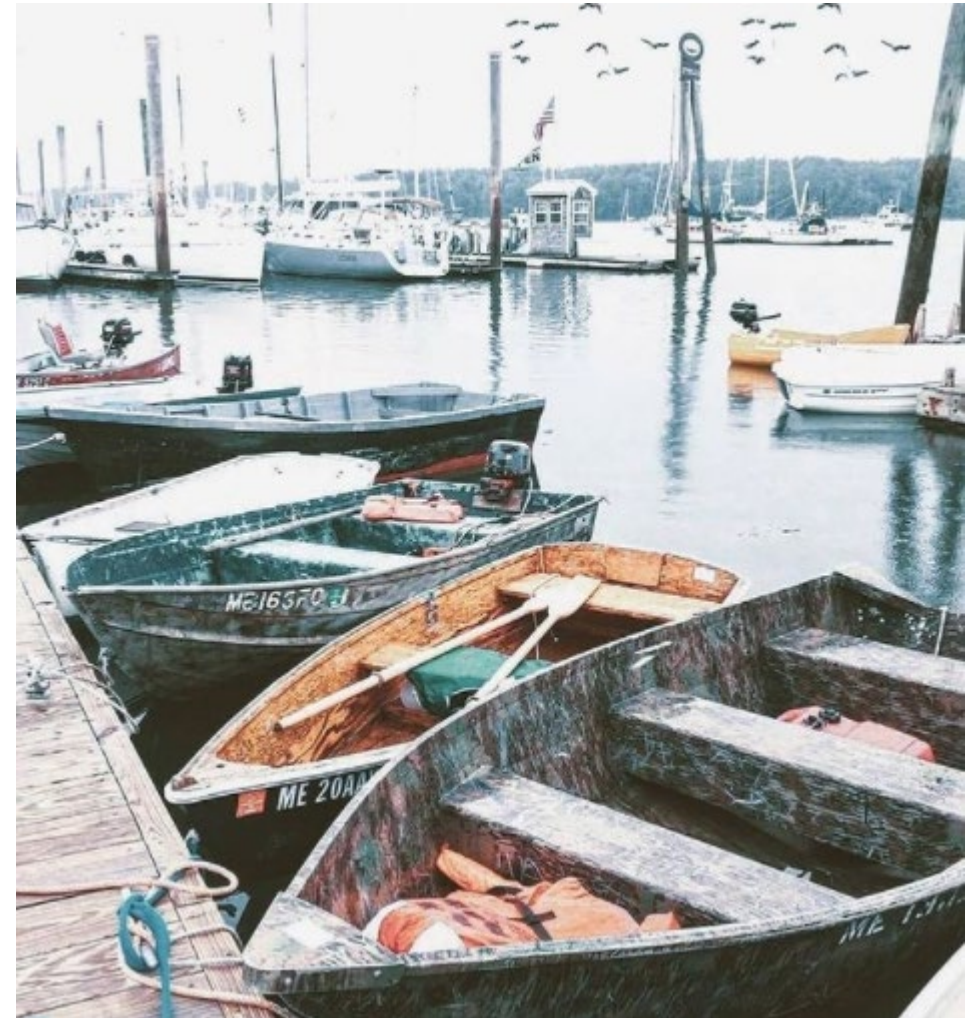
"Being able to spend time outside ski touring."

"Probably the snowmobile."

*Coded open-ended responses.
Multiple responses permitted.

RECOMMENDING MAINE & ITS REGIONS

- » **98%** of visitors would recommend Maine to a friend or relative as a vacation destination
- » **97%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip

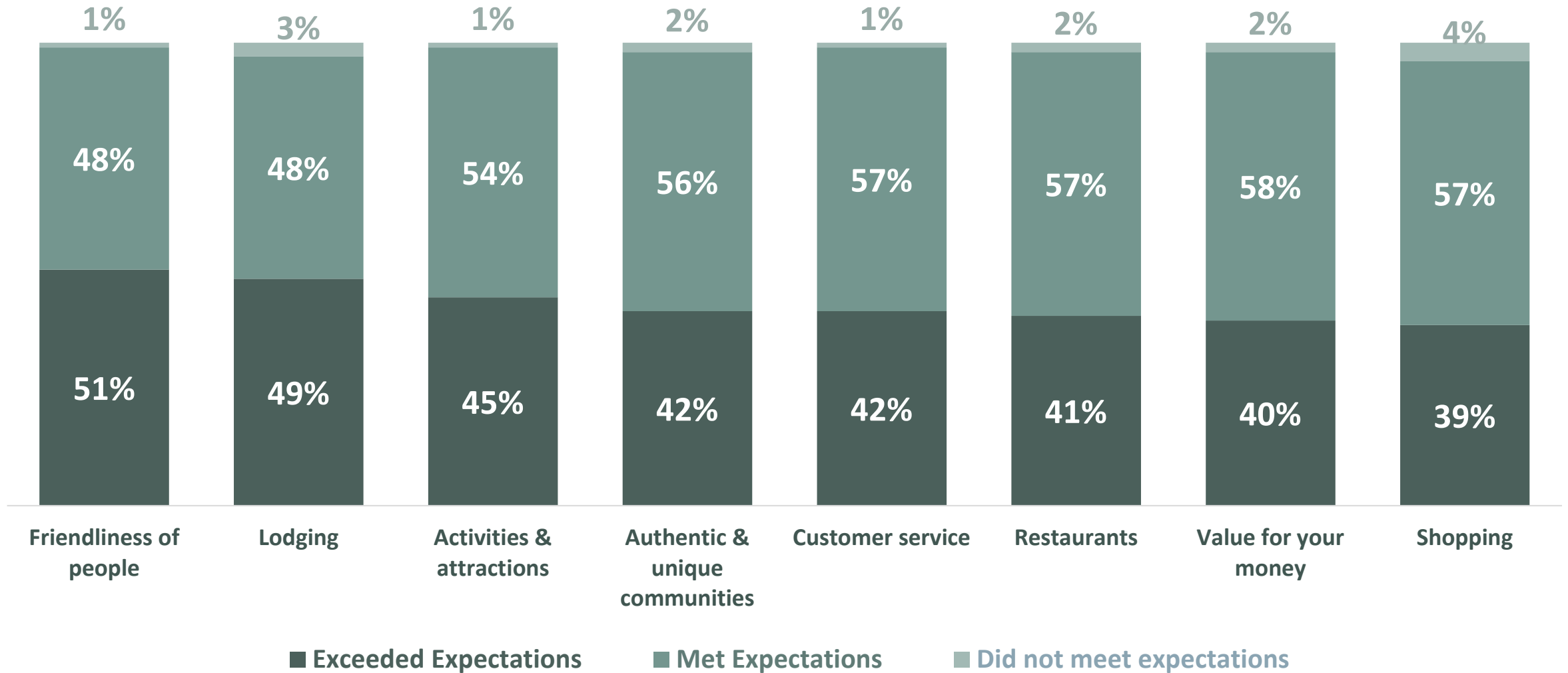


LIKELIHOOD OF RETURNING TO MAINE

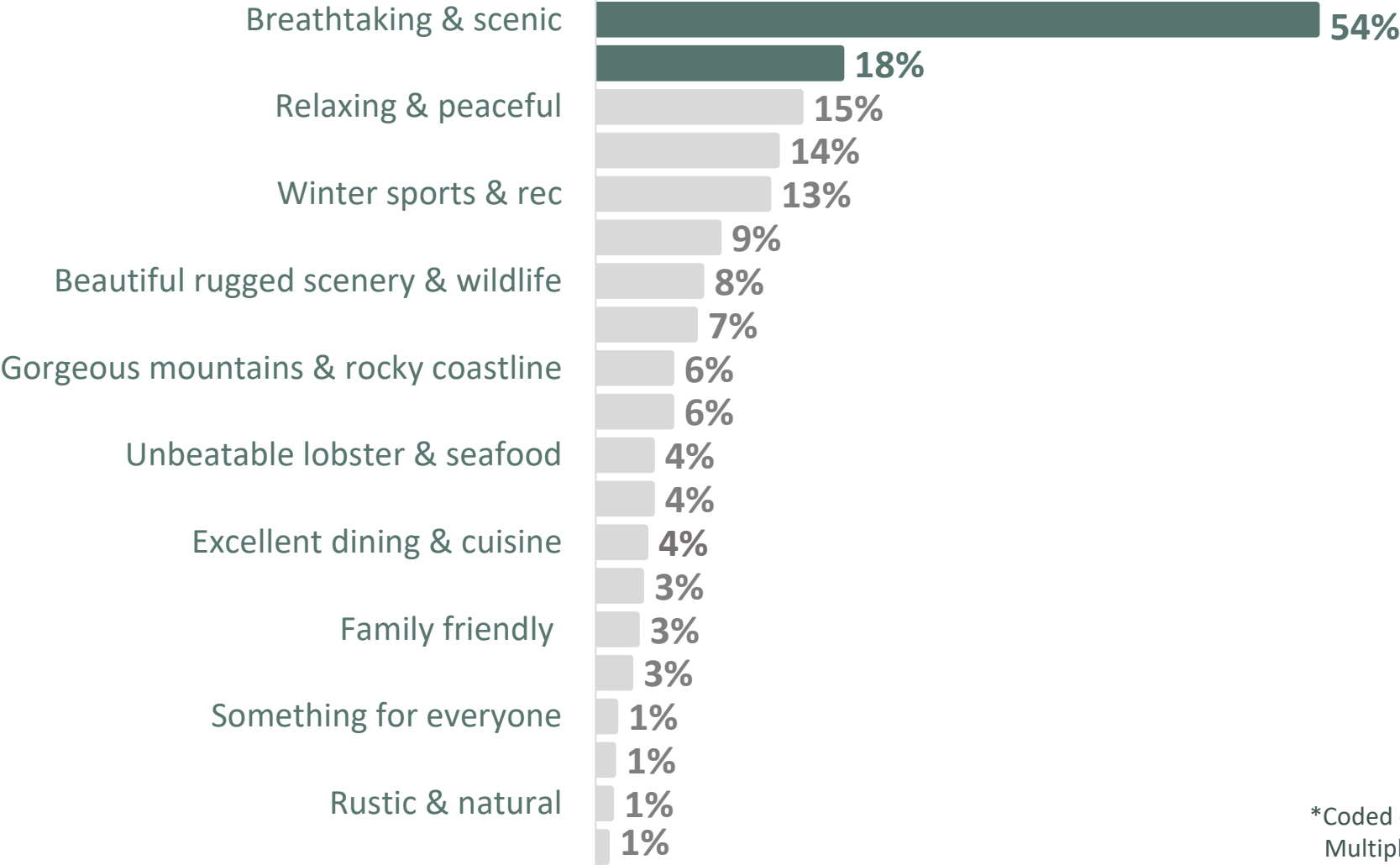
» **98%** of visitors will return to Maine for a future visit or vacation



EXPECTATIONS VS. PERFORMANCE



PERCEPTIONS OF MAINE*



*Coded open-ended responses.
Multiple responses permitted.

PERCEPTIONS: “BREATHTAKING & SCENIC”

“Beautiful parks and trails for hiking. Great mountain view and scenic views on trails. Very friendly people.”



“You cannot resist the beauty and the serenity here. We love to ride snowmobiles here because they have the best trails on the east coast.”



“Pretty skyline, oceans, forests, mountains, Maine is the peak vacation spot.”



PERCEPTIONS: “FRIENDLY LOCAL COMMUNITIES”



“Peace and quiet, very friendly people who are willing to help, outdoor activities for different seasons.”



“How can you not fall in love with the place and people? That is why we have been coming here for many years.”



“Friendly people with quiet and peaceful countryside. Great trails to ride on. We love to come here to hike and hunt too. Just lots of things you can do here.”



QUESTIONS?

