

MAINE OFFICE OF TOURISM

Fall Visitor Tracking Report
September – November 2021



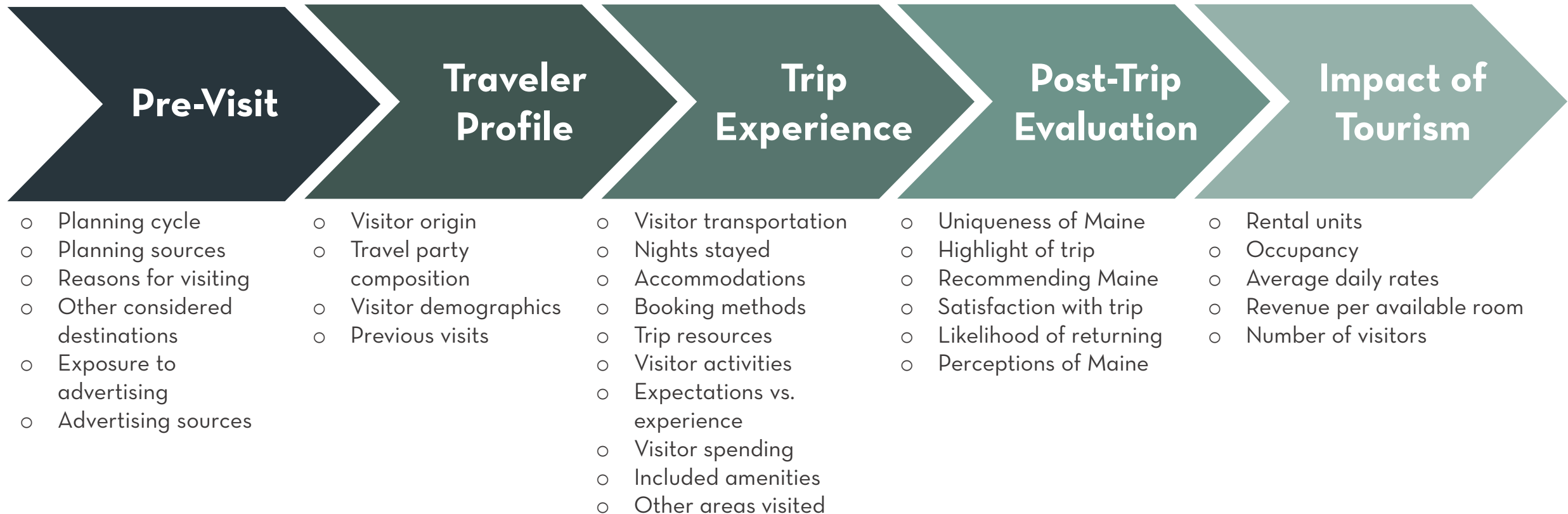
INTRODUCTION



STUDY OBJECTIVES – VISITOR JOURNEY

This report presents information about visitors to Maine from September 2021 to November 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

1,498 interviews were completed with visitors to the State of Maine online and in-person at local attractions, parks, hotels, and events between September 1st, 2021 and November 30th, 2021.

EXECUTIVE SUMMARY



TRIP PLANNING CYCLE : IMPACT OF TOURISM



SEPTEMBER – NOVEMBER 2021 KEY METRICS

| Accommodation Metrics ¹ | Hotels | Vacation Rentals | Other Rentals | Total |
|------------------------------------|-----------------|------------------|----------------|-----------------|
| <i>Occupancy</i> | <i>67.9%</i> | <i>42.9%</i> | <i>32.2%</i> | <i>53.6%</i> |
| <i>ADR</i> | <i>\$176.91</i> | <i>\$161.19</i> | <i>\$58.38</i> | <i>\$151.19</i> |
| <i>RevPAR</i> | <i>\$120.12</i> | <i>\$69.15</i> | <i>\$18.80</i> | <i>\$81.04</i> |

| Visitation ² | Maine Residents | Out-of-State Visitors | Total |
|---|-----------------|-----------------------|------------------|
| <i>September – November 2021 Visitors</i> | <i>391,900</i> | <i>2,220,600</i> | <i>2,612,500</i> |
| <i>September – November 2021 Visitors (%)</i> | <i>15.0%</i> | <i>85.0%</i> | <i>100%</i> |

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 September 2021 through November 2021. Adjustments will be made to these estimates at the end of the year, to account for seasonal fluctuations.

2019 VS. 2020 VS. 2021 KEY METRICS

The increase in the number of visitors is not as high as the increase in occupancy due to a higher percentage of visitors staying in paid accommodations and a lower percentage of day tripper visitors in 2021 than in 2019 or 2020.

| Key Metrics ¹ | September - November 2019 ² | September - November 2020 | September - November 2021 | % Change '20 - '21 |
|---------------------------|--|---------------------------------|------------------------------|-----------------------|
| <i>Number of Visitors</i> | <i>2,978,600</i> | <i>2,419,200</i> | <i>2,612,500</i> | +8.0% |
| <i>Occupancy</i> | <i>60.3%</i> | <i>49.0%</i> | <i>53.6%</i> | +9.3% |
| <i>ADR</i> | <i>\$142.77</i> | <i>\$110.57</i> | <i>\$151.19</i> | +36.7% |
| <i>RevPAR</i> | <i>\$86.09</i> | <i>\$54.18</i> | <i>\$81.04</i> | +49.6% |

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

² 2019 data have been adjusted to reflect 2020 and 2021 methodology.

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » **Over 3 in 4** visitors started planning their trip in Maine at least a month in advance
- » **2 in 5** visitors booked accommodations at least 3 months in advance



TOP ONLINE TRIP PLANNING SOURCES*

3 in 4 visitors used one or more online resources to help them plan their trip in Maine
The top planning sources used by visitors are below:



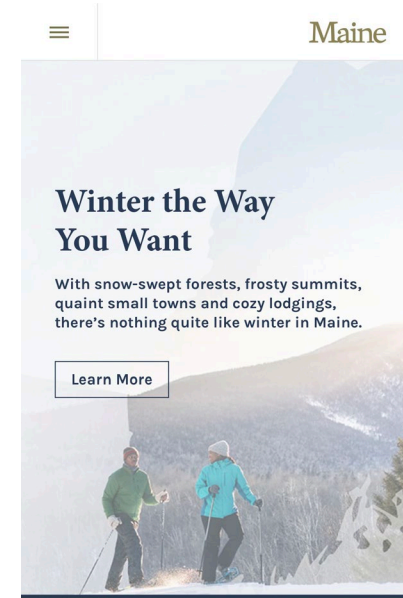
42% Online search engines



18% Hotel websites



17% TripAdvisor



16% VisitMaine.com



16% Online travel agency

*Multiple responses permitted.

TOP OFFLINE TRIP PLANNING SOURCES*



35% Advice from friends/family



14% Articles or travelogues



13% Travel guides & brochures



12% AAA

*Multiple responses permitted.

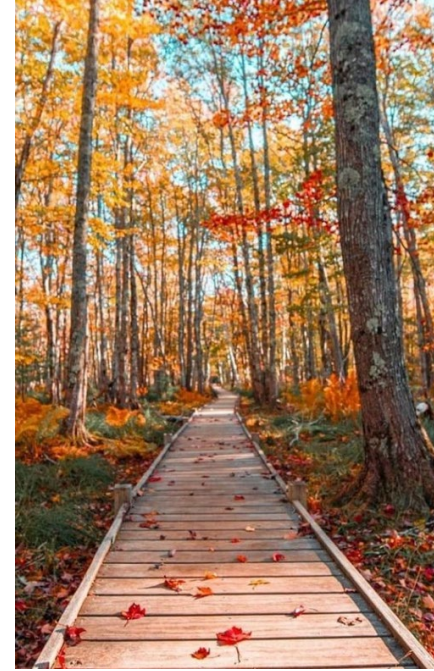
TOP REASONS FOR VISITING*



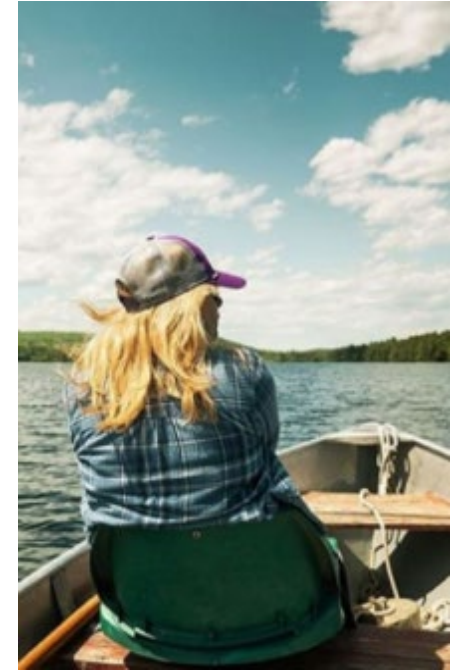
42%
Sightseeing/touring



37%
Relax & unwind



26% Nature,
environment



21% Visiting
friends/relatives

*Up to three responses permitted.

Large increases from previous year are due to removing "vacation" as an option for visitors to select.

CONSIDERING MAINE AS A DESTINATION

- » **7 in 10** visitors did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip
- » **1 in 6** visitors considered visiting New Hampshire and **1 in 10** visitors considered visiting Massachusetts



PRE-TRIP EXPOSURE TO ADVERTISING

- » **Over 2 in 5** visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip (up 5% points from 2020)



TOP SOURCES OF ADVERTISING EXPOSURE*



34% Internet



28% Social media



20% Cable or satellite television



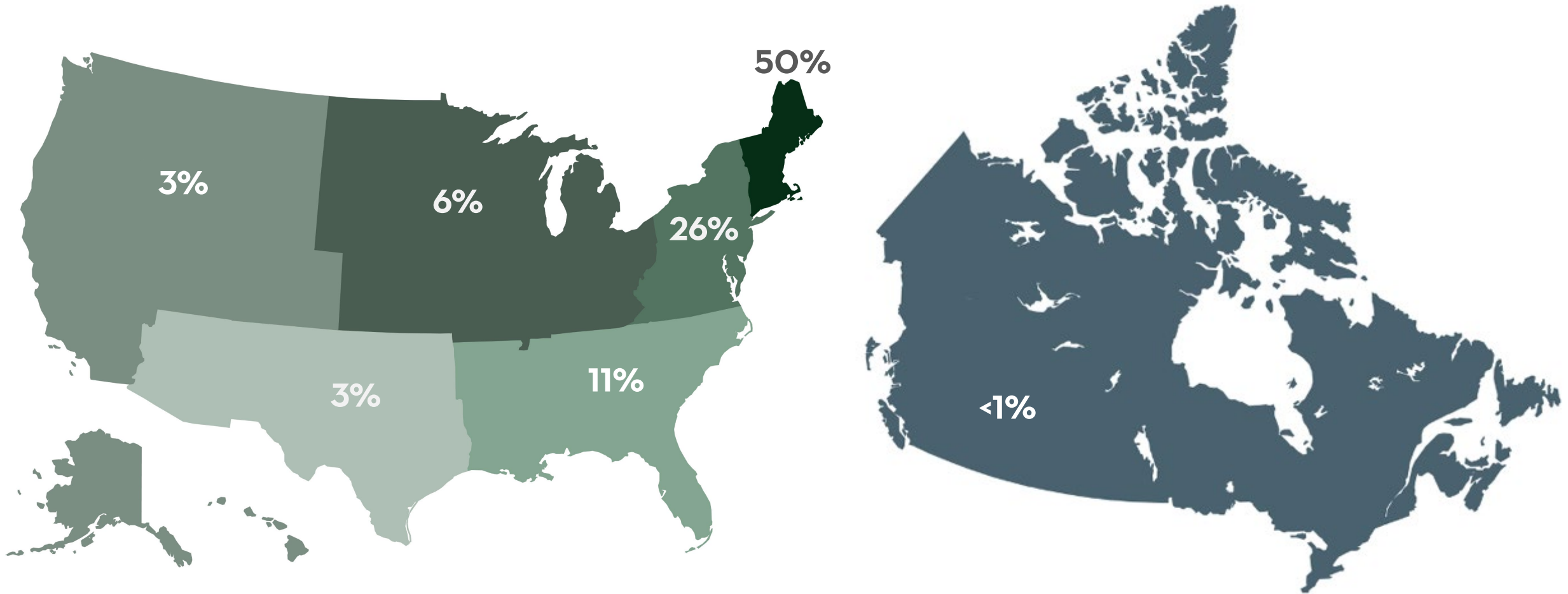
19% Magazine

*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE

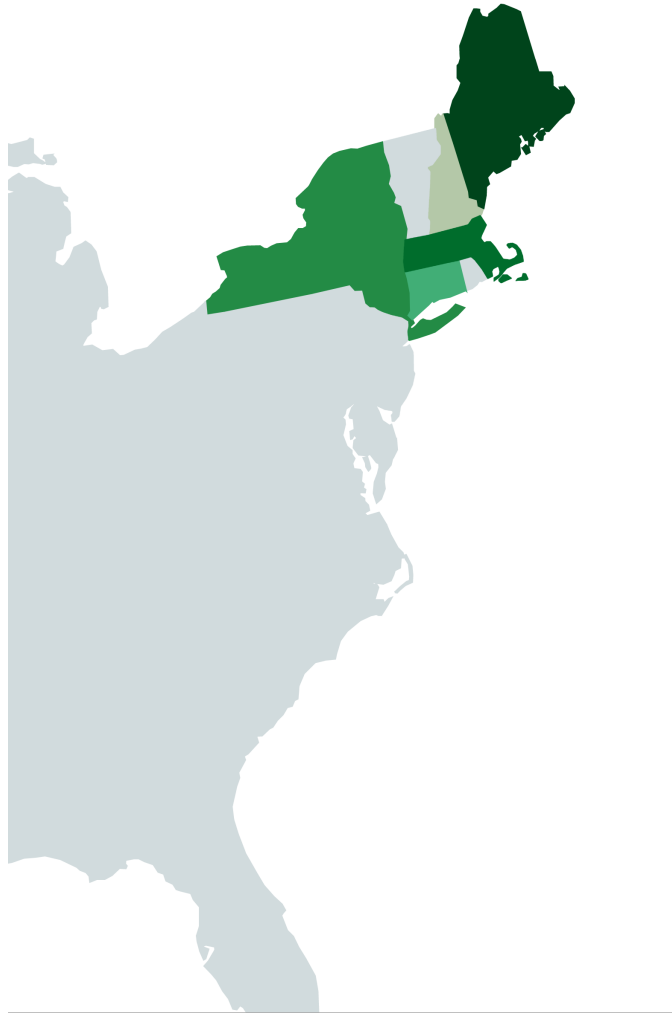


REGIONS OF ORIGIN



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

TOP ORIGIN STATES & PROVINCES



59%

of visitors traveled from **5** U.S. states, including from other regions of Maine.

Maine (17%)

Massachusetts (16%)

New York (12%)

Connecticut (8%)

New Hampshire (6%)

TOP ORIGIN MARKETS



10% New York City¹



8% Boston



4% Washington DC -
Baltimore



3% Philadelphia



3% Albany

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

TRAVEL PARTIES

The typical Maine visitor traveled with **2.7** 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



53% Female



83% College/technical graduate



82% Married/domestic partnership



53% Employed full-time



87% White/Caucasian



\$89,000 annual household income

NEW & RETURNING VISITORS

- » **Nearly 1 in 3** visitors were traveling in Maine for the first time
- » **Nearly 3 in 10** visitors had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



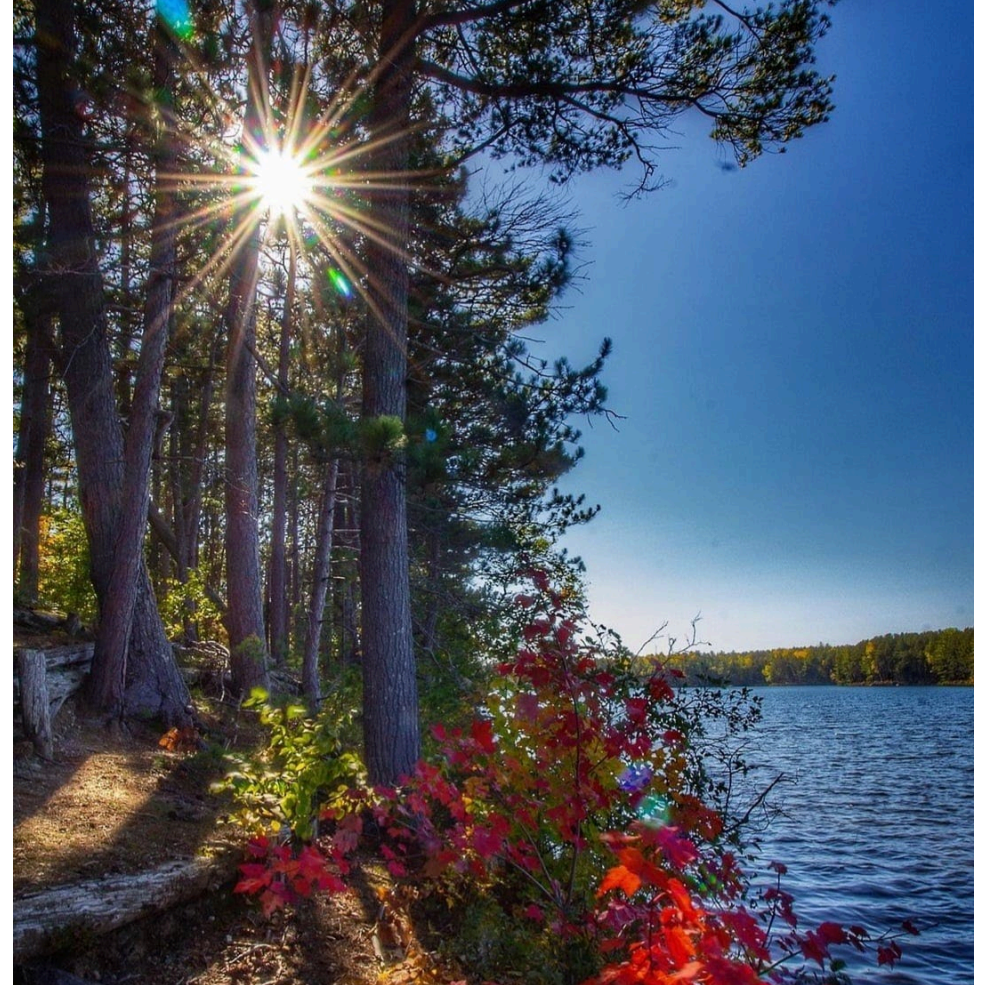
TRANSPORTATION

- » **79%** of visitors drove to their Maine destination
- » **5%** of visitors flew to Maine through Portland International Jetport and Boston Logan International Airport



NIGHTS STAYED

- » **83%** of visitors spent one or more nights in Maine
- » Typical visitors stayed **5.4** nights in Maine on their trip



TOP ACCOMMODATIONS



32% Hotel/motel/resort



17% Did not stay overnight



15% Friend/relative home



10% Rental condo, house

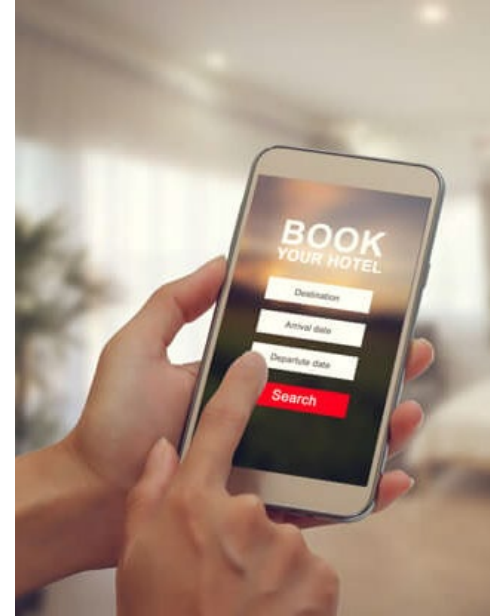
TOP IN-MARKET VISITOR RESOURCES*



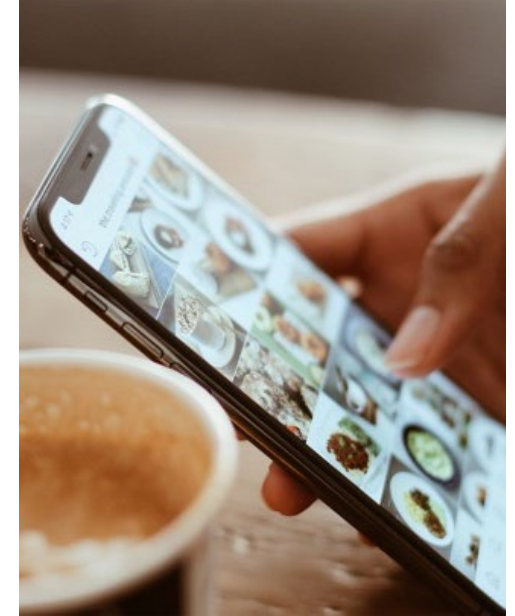
54% Navigation
websites/apps



24% Visitor Information
Centers



20%
Hotel/resort website/apps



19% Restaurant
website/apps

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



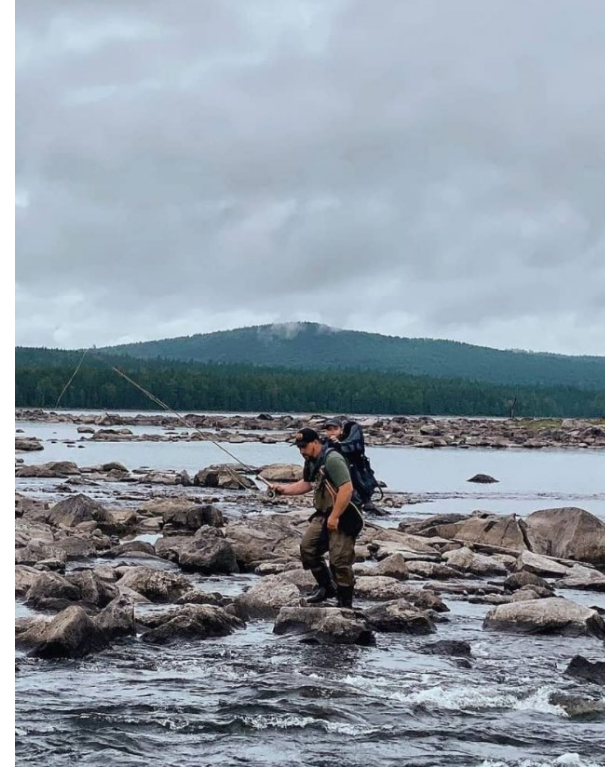
78% Food/beverage/
culinary



67% Touring/sightseeing



48% Shopping



40% Active outdoor
activities

*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in Maine spent **\$545** per day and **\$2,836** during their trip
- » Visitors who stayed overnight in unpaid accommodations in Maine spent **\$254** per day and **\$1,931** during their trip
- » Visitors who did not stay overnight in Maine spent **\$236** during their trip



VISITING OTHER STATES & PROVINCES

- » **Over 2 in 3** visitors did not visit any other U.S. state or Canadian province on their trip to Maine
- » **1 in 6** visitors also visited New Hampshire or Massachusetts on their trip
- » In 2021, Maine visitors were **more likely** to visit other states as part of their trip



TRAVELING WITHIN MAINE

- » **Over half** of visitors traveled to other regions within the state other than their primary destination during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



MAINE AS A UNIQUE DESTINATION



Breathtaking Coastal & Mountain Views

"A scenic coastline, the fall foliage, great seafood, friendly people, a safe and relaxing environment."

"Maine offers you a relaxing environment, a peace of mind, in a beautiful surrounding wherever you look or go."

"Beautiful scenic places, great coastline and national parks, good seafood, friendly people."

Exciting & Fun Attractions

"A beautiful coastline, numerous lighthouses, magnificent scenery, and great national parks."

"Excellent state parks. National, too. Wilderness. Atlantic."

"Acadia National Park, and a great coastline and the fall foliage."

*Coded open-ended responses. Multiple responses permitted.

TOP TRIP HIGHLIGHTS*



Enjoy the Beaches & Rocky Coastline

"Beautiful coastline, plenty of lighthouses and lobsters, Acadia National Park, amazing scenery and a relaxing environment."

"A beautiful coastline with great scenic views, and now with the fall foliage."

"The best sandy or rocky beaches of America, not overcrowded yet."

Picturesque Scenery

"Beautiful nature - peace and isolation."

"Unparalleled opportunities for painting. Iconic seascapes and architecture."

"Beautiful sceneries, coastline, beaches, lighthouses, lobsters, friendly people, relaxing environment."

*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
- » **94%** 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

- » **88%** of visitors will return to Maine for a future visit or vacation (down 8% points from last year)
- » The current lack of work force negatively affected at least 1 in 6 Fall visitors' trip experiences: **18%** of visitors said that customer service did not meet their expectations and **16%** said that restaurants did not meet their expectations



TOP PERCEPTIONS OF MAINE*



Breathtaking & scenic

"A beautiful area filled with a number of gorgeous views and sights to hike or drive to. The towns wrap it all together into a perfect place for vacation along a road trip."

"A must on a bucket list. Loved getting off the interstate for some of the way. Able to see the real thing. Beautiful."

"Beautiful time of year to visit the state. But a lot closed down already. Still had some fun exploring the coast."

Perfect Place to Vacation

"Botanical Gardens are amazing. Whale Watch, too. Loved the trip."

"Environmental wonder. Maine obviously cares about natural resources. Parks still too crowded but not unbearable."

"Maine has so many beautiful lakes that can provide you all the activities that you are looking for."

*Coded open-ended responses.
Multiple responses permitted.

DETAILED FINDINGS



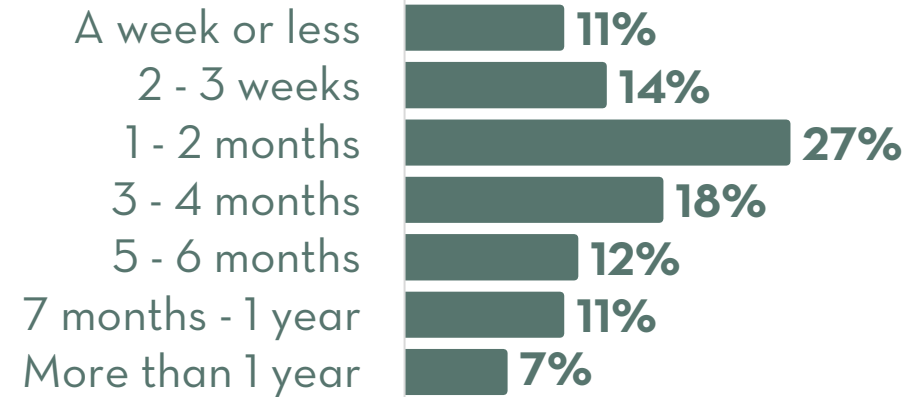
TRIP PLANNING CYCLE : PRE-VISIT



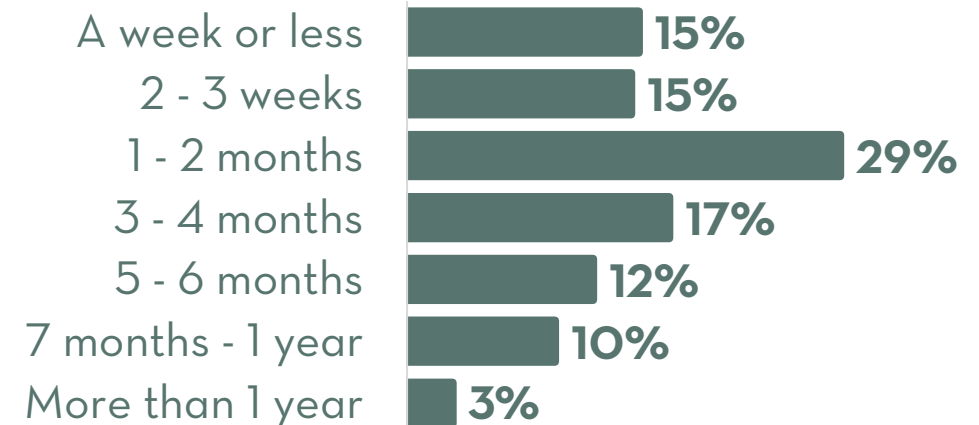
TRIP PLANNING CYCLE

- » **Over 3 in 4** visitors started planning their trip at least a month in advance, while **1 in 4** visitors had a booking window of less than 1 month
- » Compared to Fall 2020 visitors were much **less likely** to plan trips at the last minute
- » **2 in 5** visitors booked accommodations 3+ months in advance
- » Only **30%** of visitors booked within 3 weeks of the trip compared to **51%** who did so in 2020

Beginning of Trip Planning Cycle

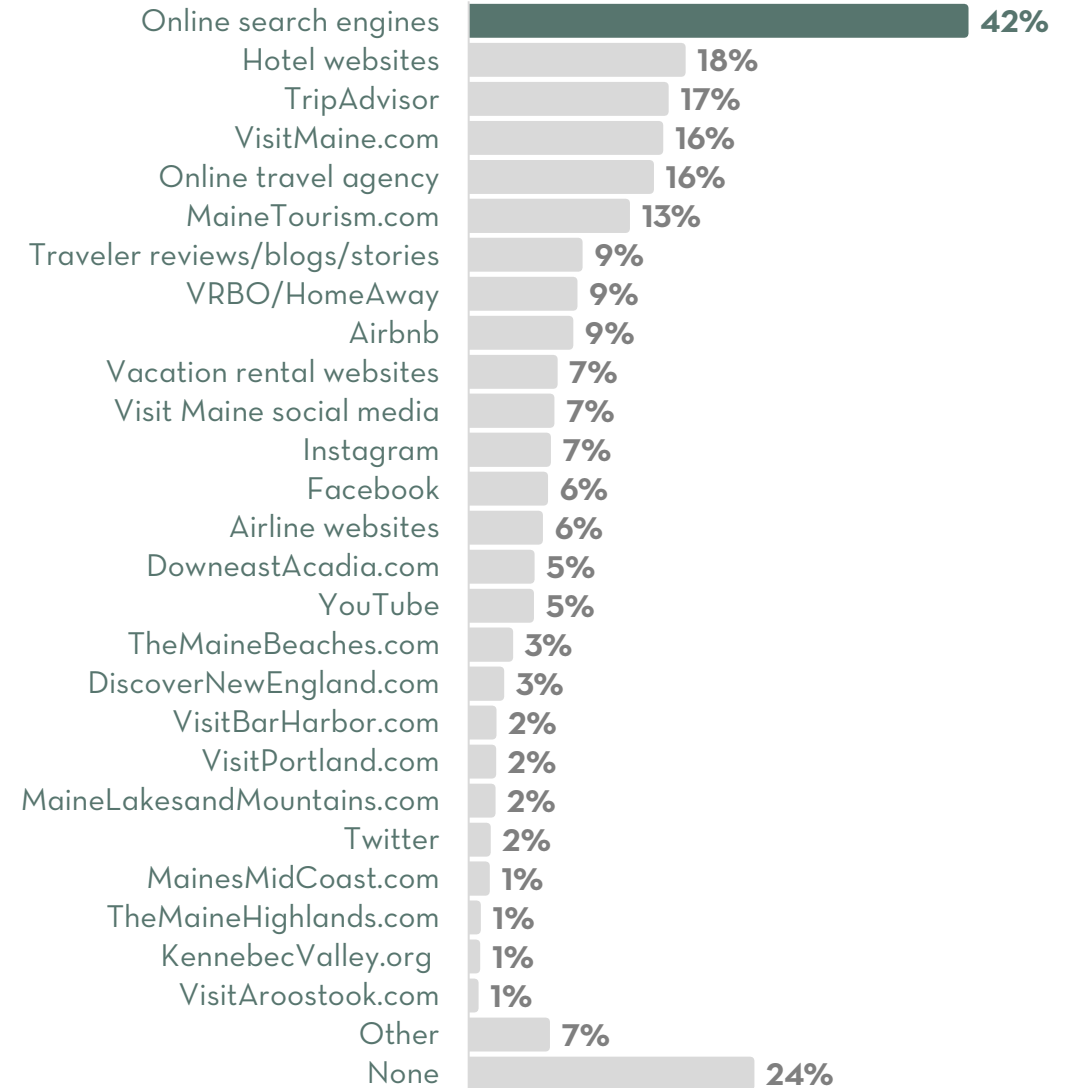


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

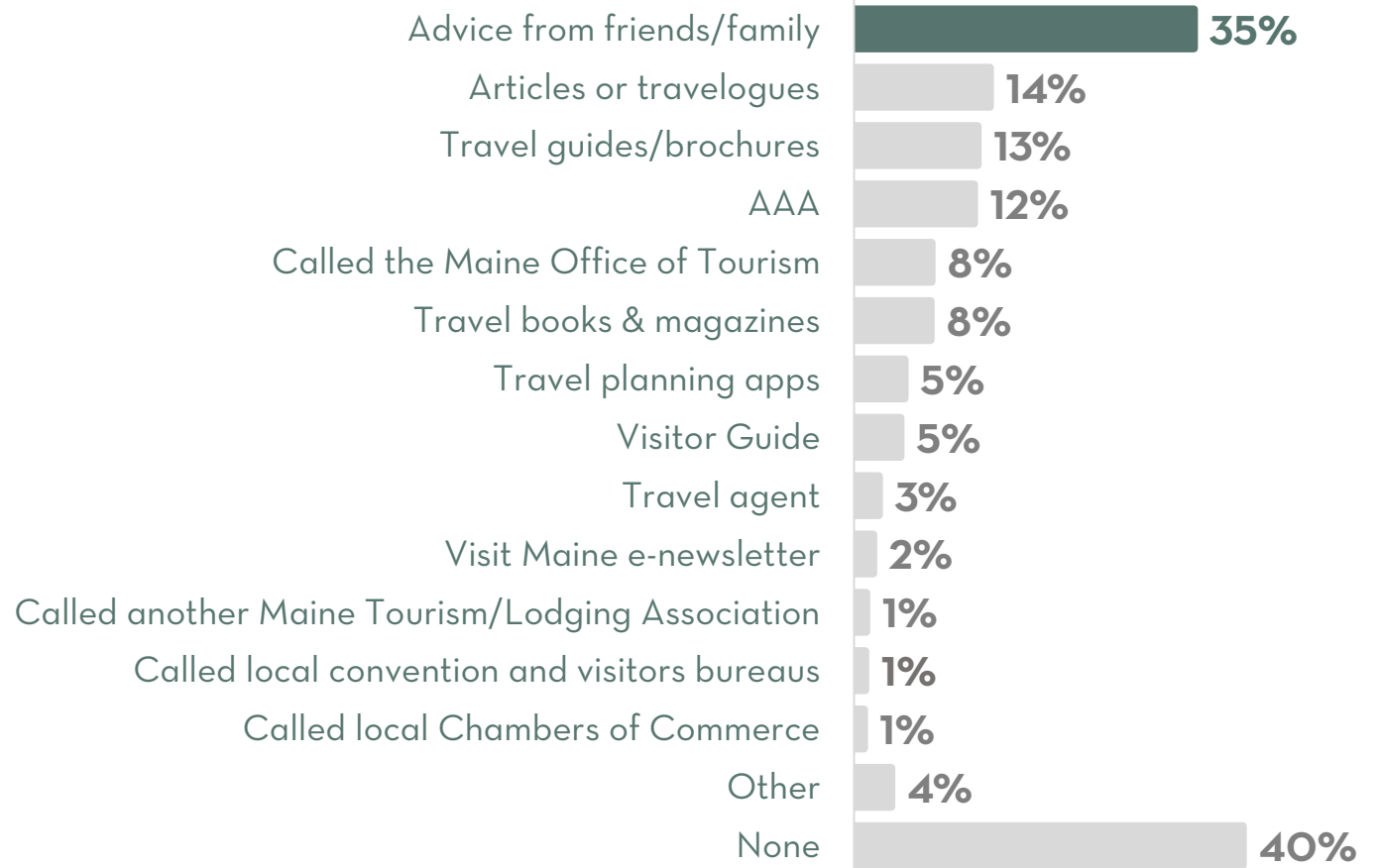
- » **3 in 4** visitors used one or more online resources to help them plan their trip in Maine
- » **Over 2 in 5** visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » **16%** of visitors used VisitMaine.com, and **13%** used MaineTourism.com
- » **More** visitors used online planning sources compared to 2020



*Multiple responses permitted.

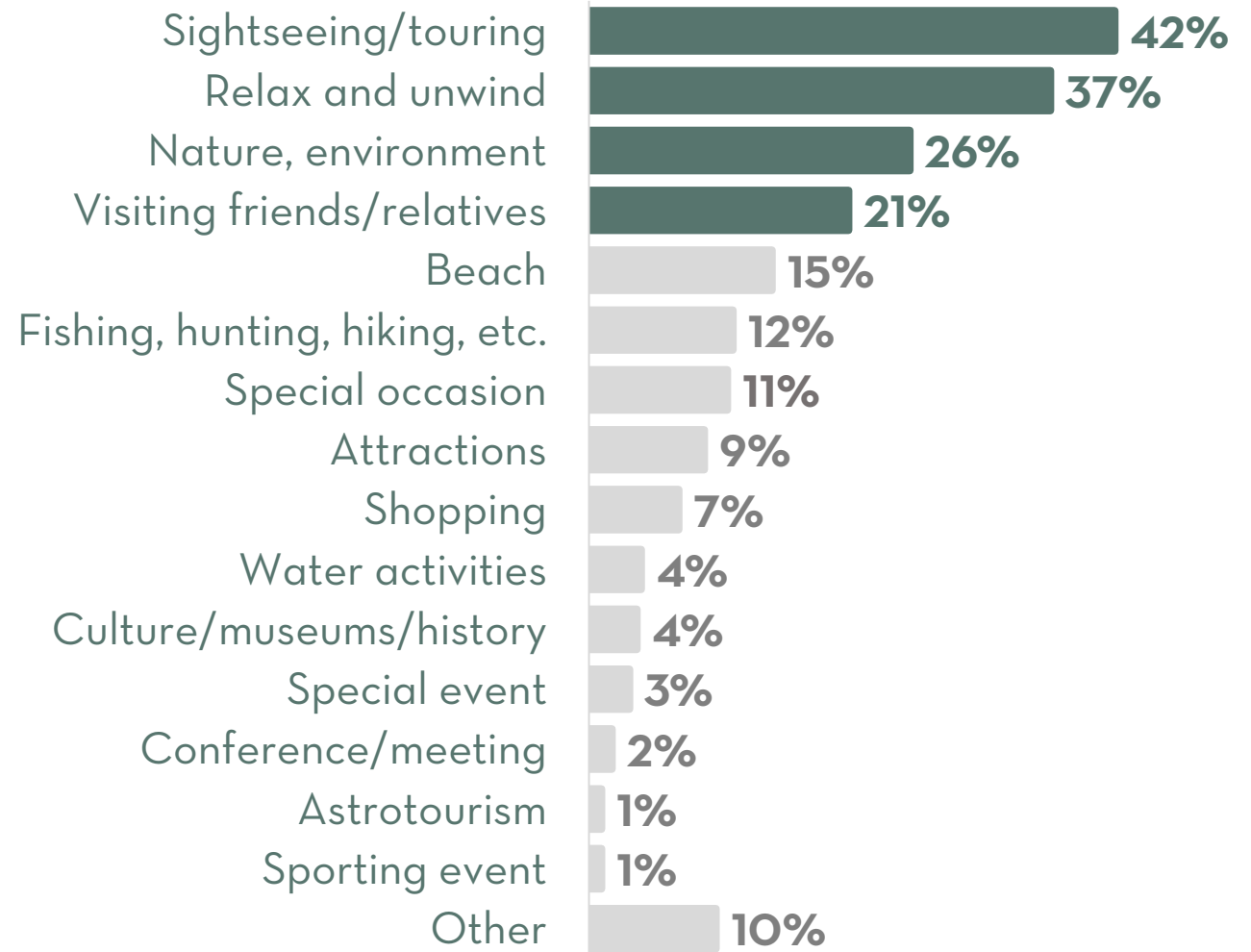
OFFLINE TRIP PLANNING SOURCES*

- » **Over 1 in 3** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » **2 in 5** visitors did not use any offline resources to help them plan their trip in Maine
- » **More** visitors used offline planning sources compared to 2020



REASONS FOR VISITING*

- » **Over 2 in 5** visitors primarily traveled to Maine to go sightseeing or touring
- » **Over 1 in 3** visitors visited Maine to relax & unwind

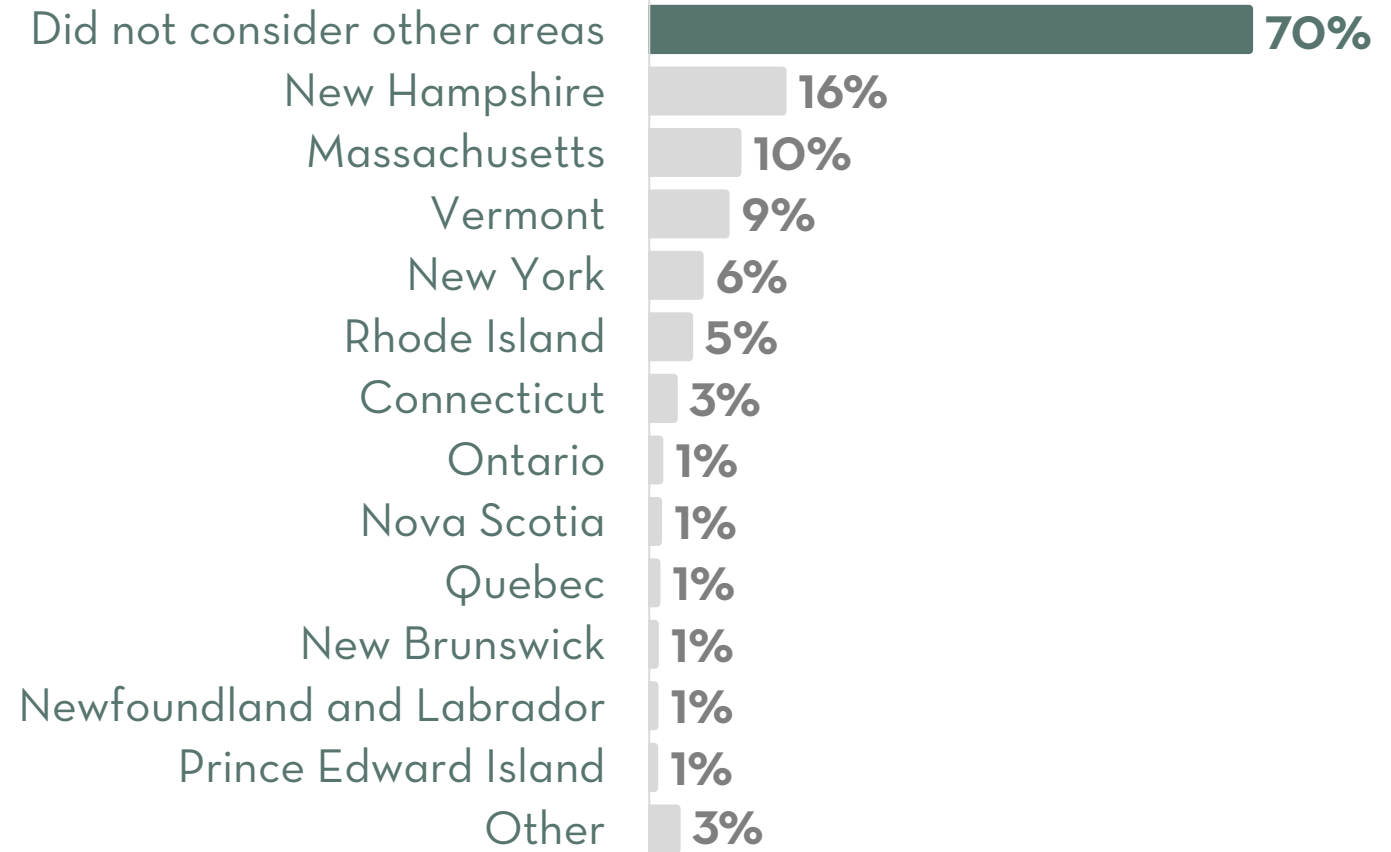


*Multiple responses permitted.

Large increases from previous year are due to removing "vacation" as an option for visitors to select.

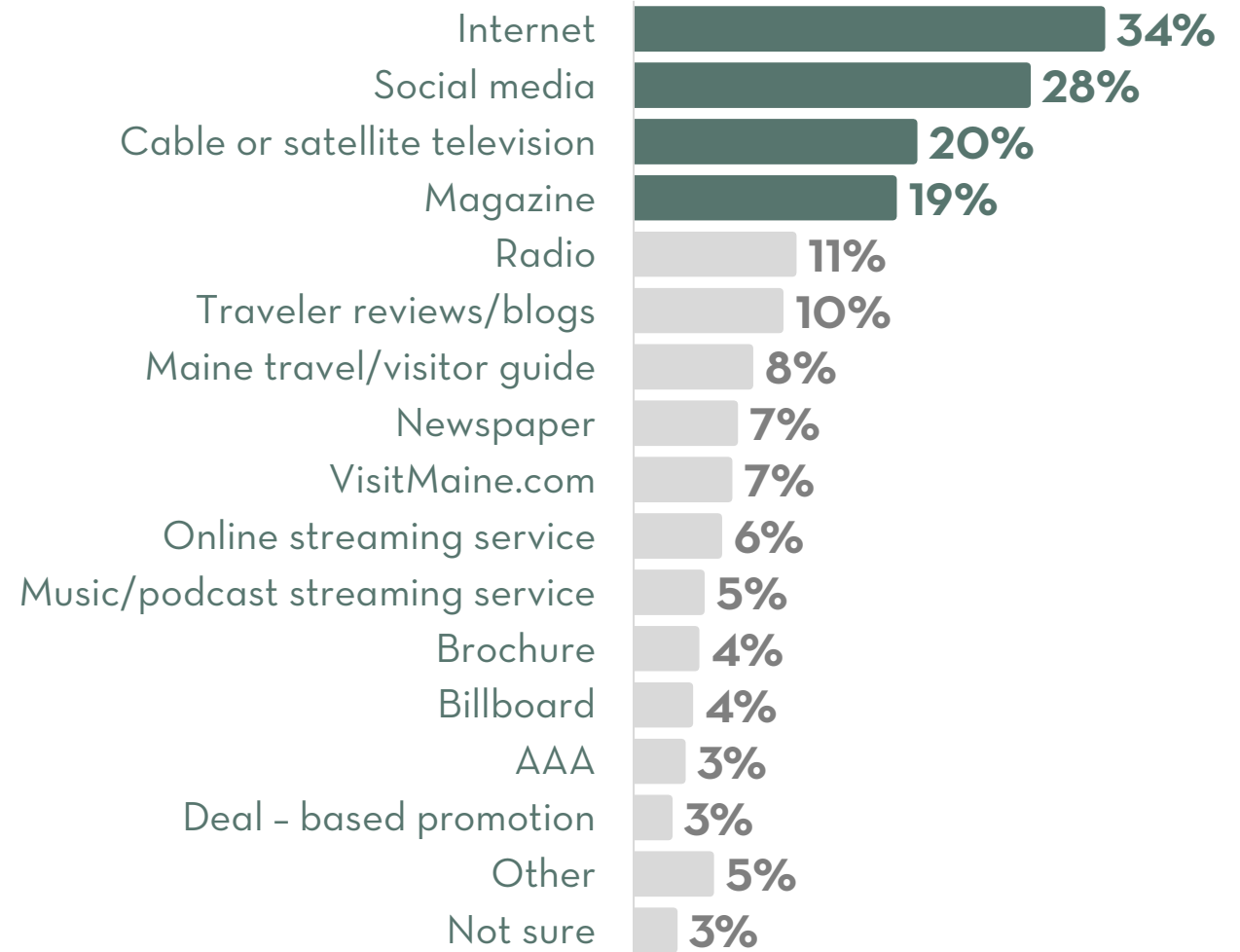
OTHER STATES & PROVINCES CONSIDERED*

- » **7 in 10** visitors considered visiting **ONLY** Maine while planning their trips
- » Visitors were **more likely** to consider visiting nearby U.S. states rather than visiting a Canadian province



PRE-TRIP EXPOSURE TO ADVERTISING*

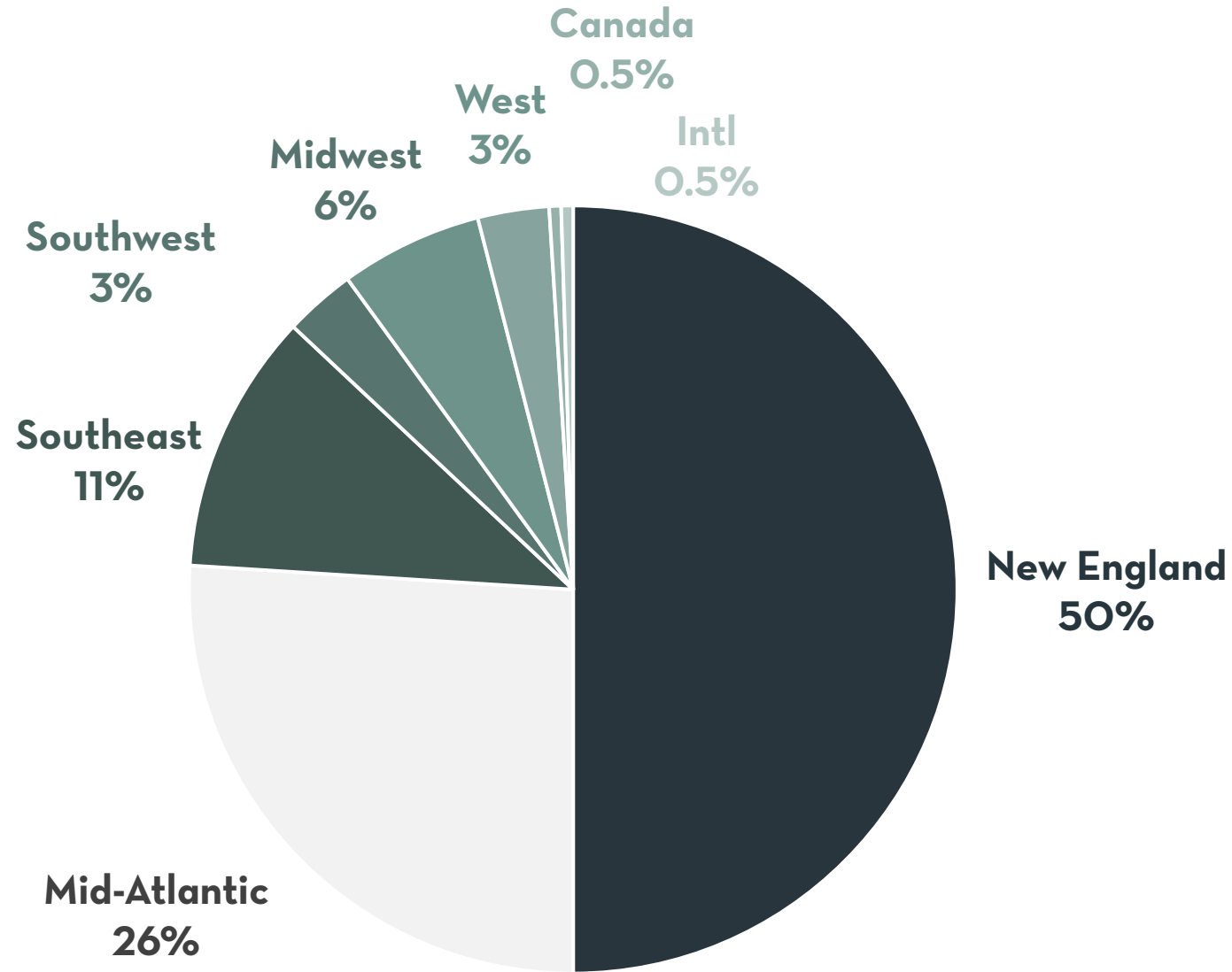
- » **41%** of visitors noticed advertising or promotions for Maine prior to their trip
- » Visitors who were exposed to this advertising primarily saw it on **social media or the internet**



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **Over half** of visitors were from Maine, Massachusetts, New York, Connecticut, or New Hampshire
- » **83%** of visitors came from **12** U.S. states
- » **1 in 6** visitors traveled from another region of Maine
- » In 2021, visitors were **more likely** to come from Massachusetts and New York and less likely to be from Maine

| State/Country | Percent |
|----------------|---------|
| Maine | 17% |
| Massachusetts | 16% |
| New York | 12% |
| Connecticut | 8% |
| New Hampshire | 6% |
| New Jersey | 5% |
| Pennsylvania | 5% |
| Florida | 4% |
| Virginia | 3% |
| Vermont | 3% |
| Maryland | 2% |
| North Carolina | 2% |

TOP ORIGIN MARKETS

- » **New York City** was the key origin market during the Fall
- » **1 in 3** visitors traveled from **7** markets
- » Compared to 2020, New York and Boston remained the top two origin markets

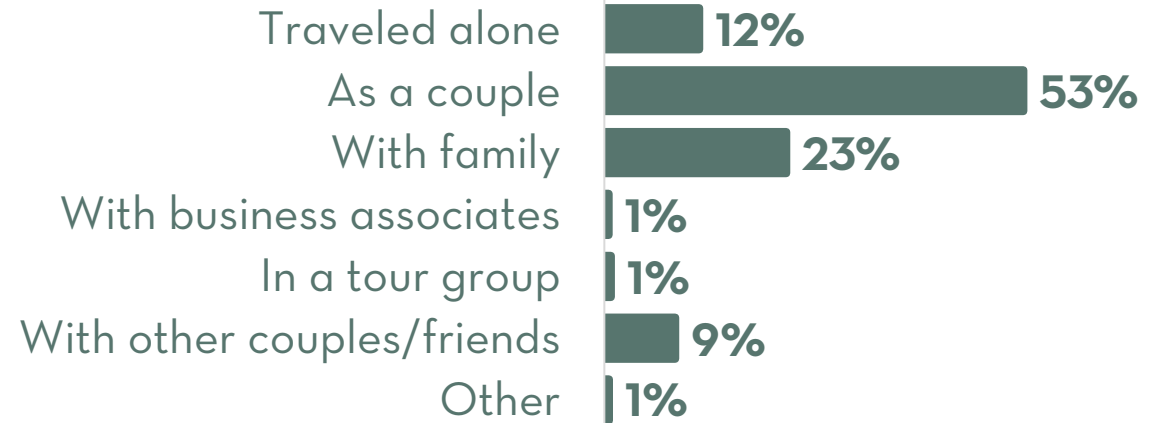
| Market | Percent |
|---------------------------|---------|
| New York City | 10% |
| Boston | 8% |
| Washington DC - Baltimore | 4% |
| Philadelphia | 3% |
| Albany | 3% |
| Providence | 2% |
| Chicago | 2% |

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

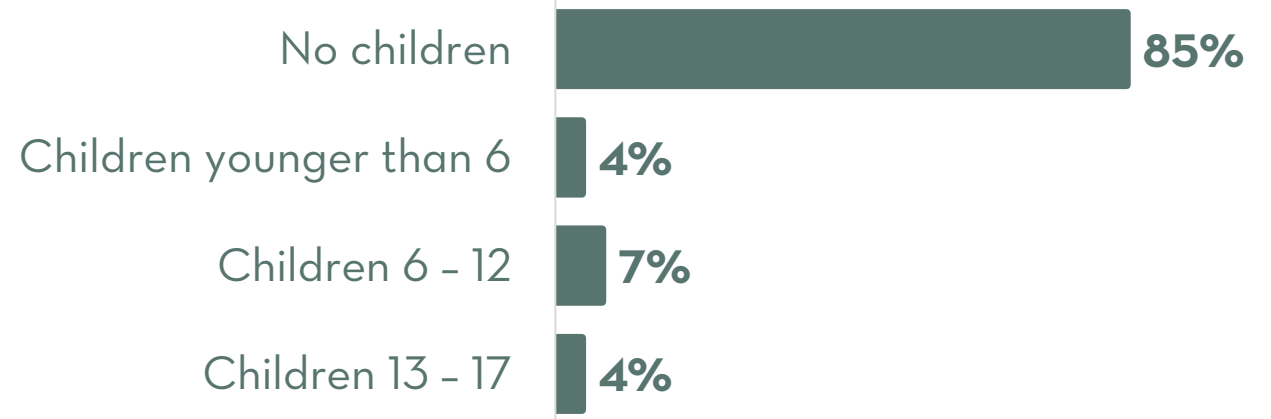
TRAVEL PARTIES

- » Typical visitors traveled in Maine with a party of **2.7** people
- » **Over half** of visitors traveled as a couple, while nearly **1 in 4** traveled as a family
- » In 2021, visitors were **more likely** to travel as a couple and families
- » **1 in 7** visitors traveled in Maine with one or more children in their travel party

Travel Party Composition



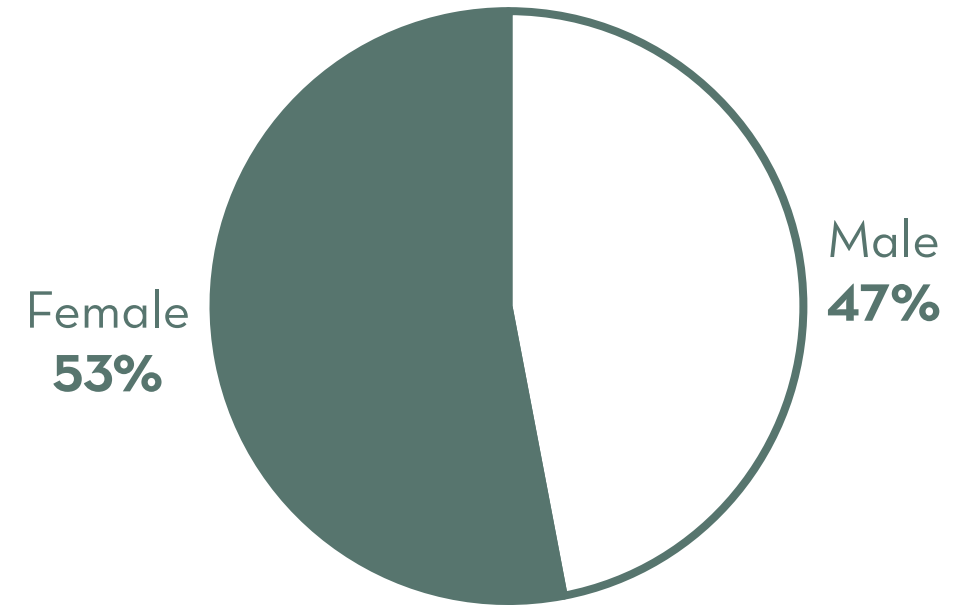
Children in Travel Party*



*Multiple responses permitted.

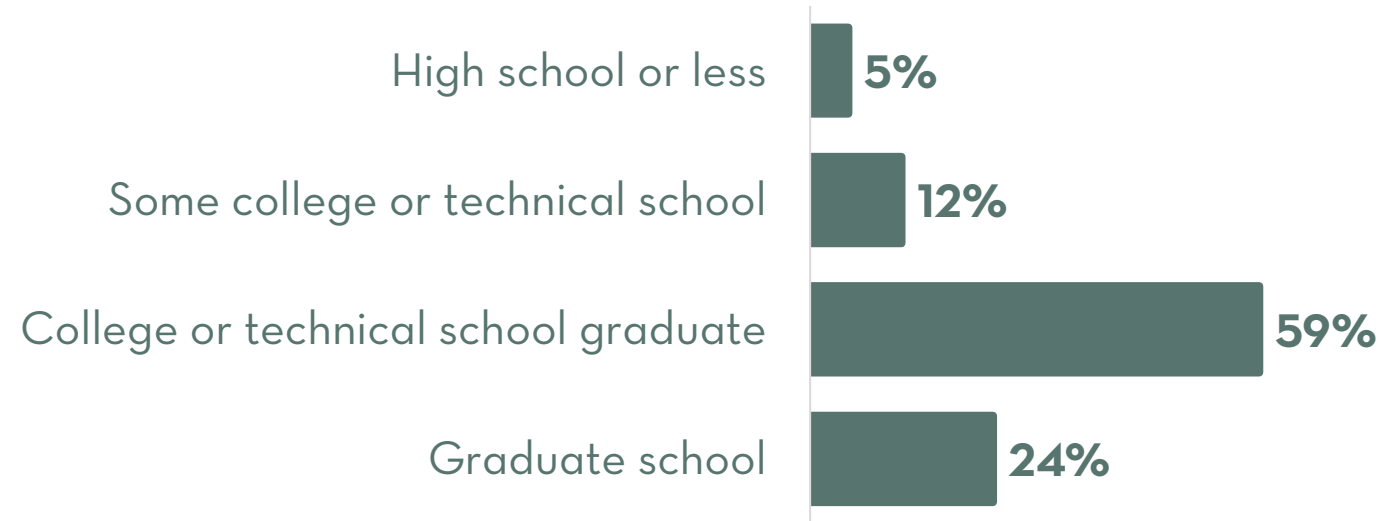
GENDER

» **Half** of visitors interviewed in Maine were female



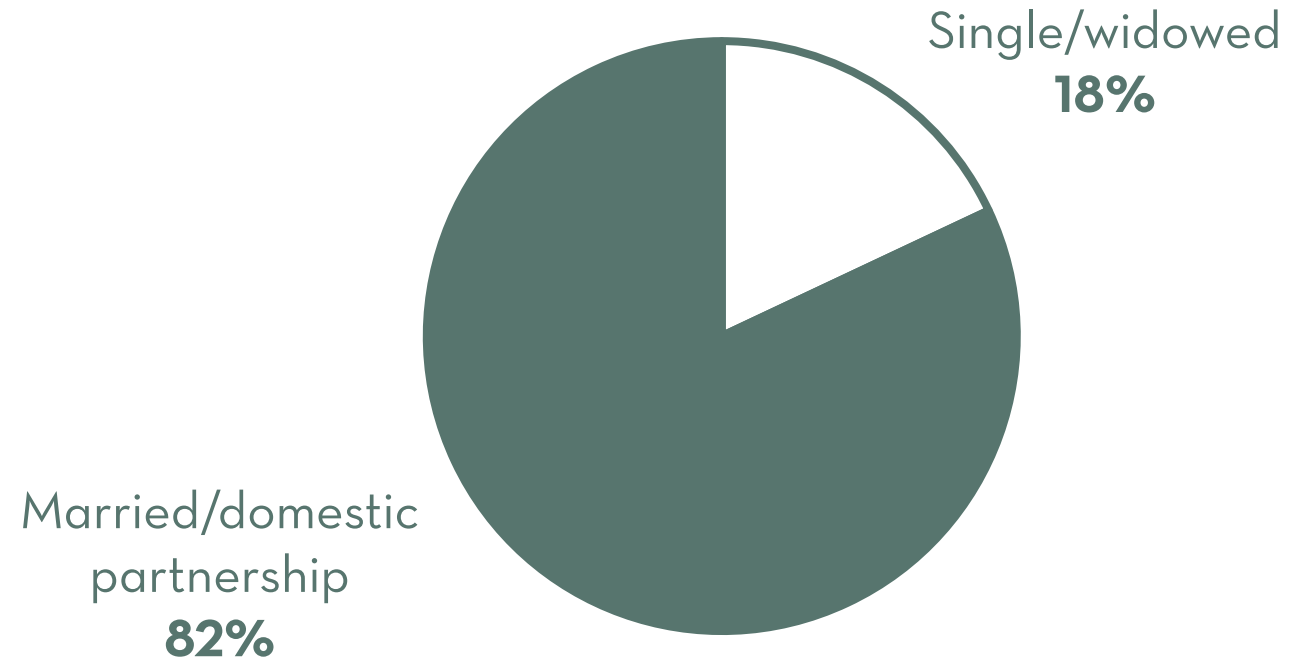
EDUCATIONAL ATTAINMENT

- » Maine visitors have substantial formal educations, with **4 out of 5** having at least a college or technical school degree, and over **1 in 4** possessing a graduate degree
- » Compared to 2020, the Fall 2021 visitor was more highly educated



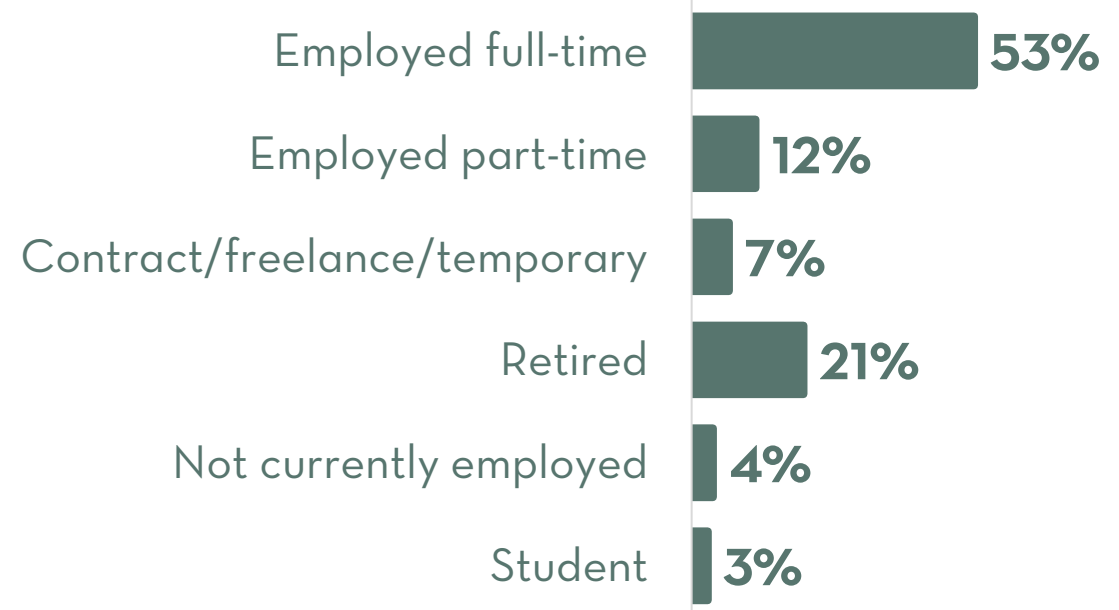
MARITAL STATUS

- » **Over 4 in 5** visitors to Maine were married or living with their partner



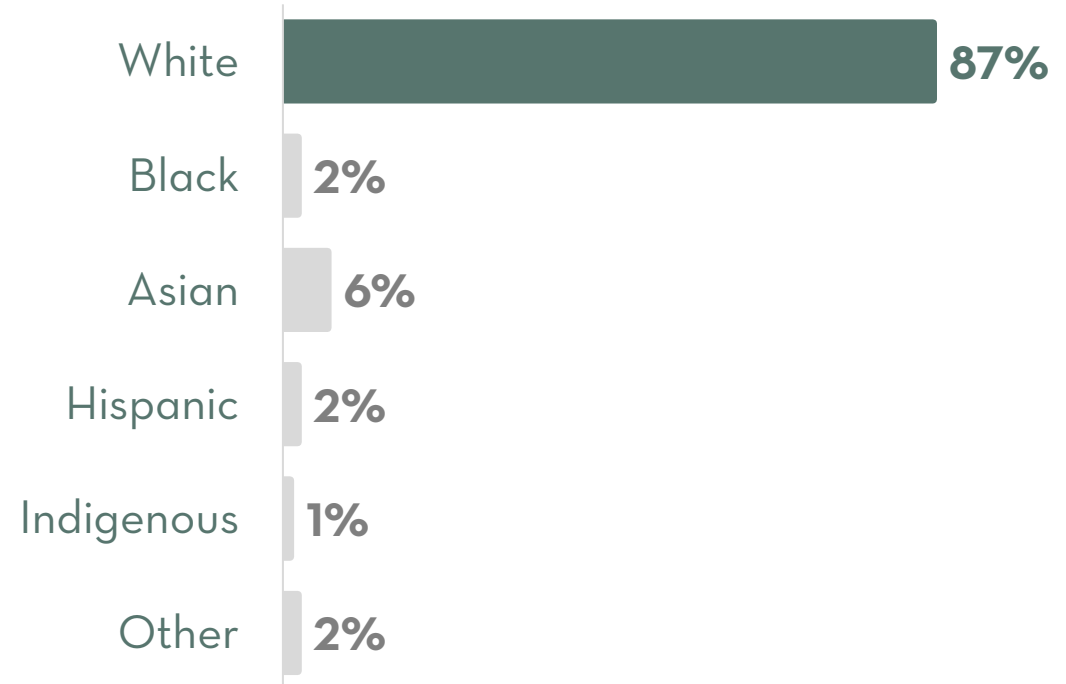
EMPLOYMENT STATUS

» **Nearly 2 out of 3** visitors to Maine were employed, most full-time



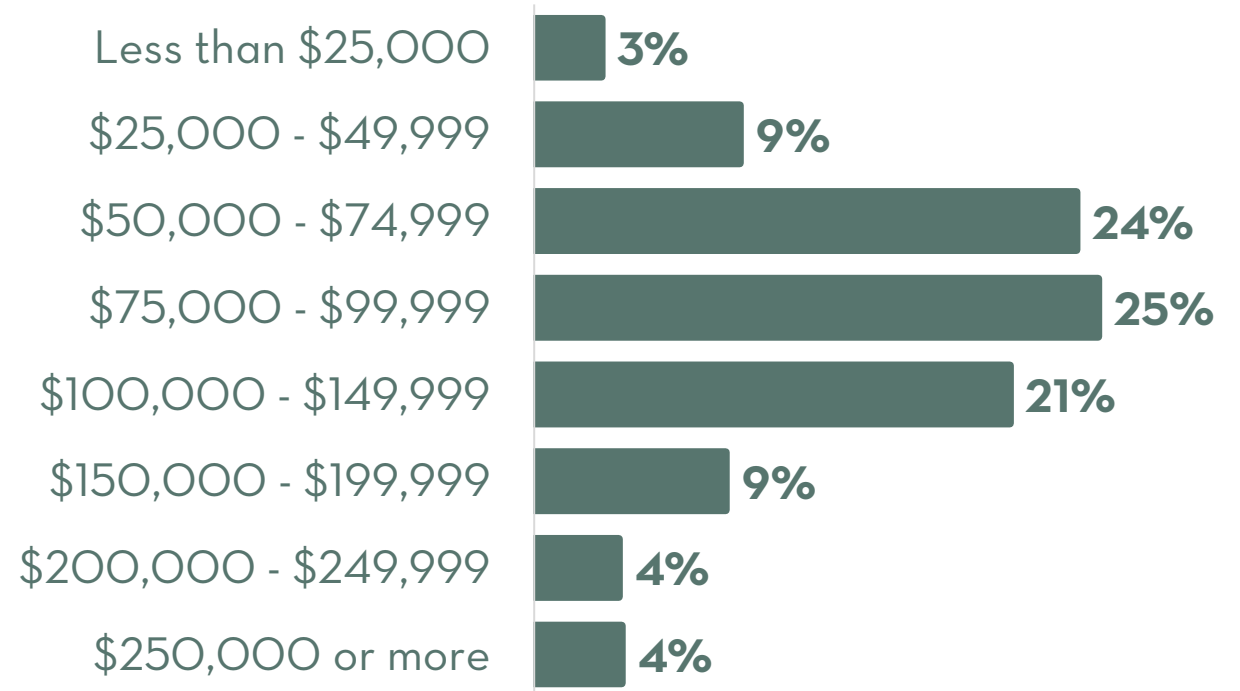
RACE & ETHNICITY

» **Nearly 9 in 10** visitors to Maine were White



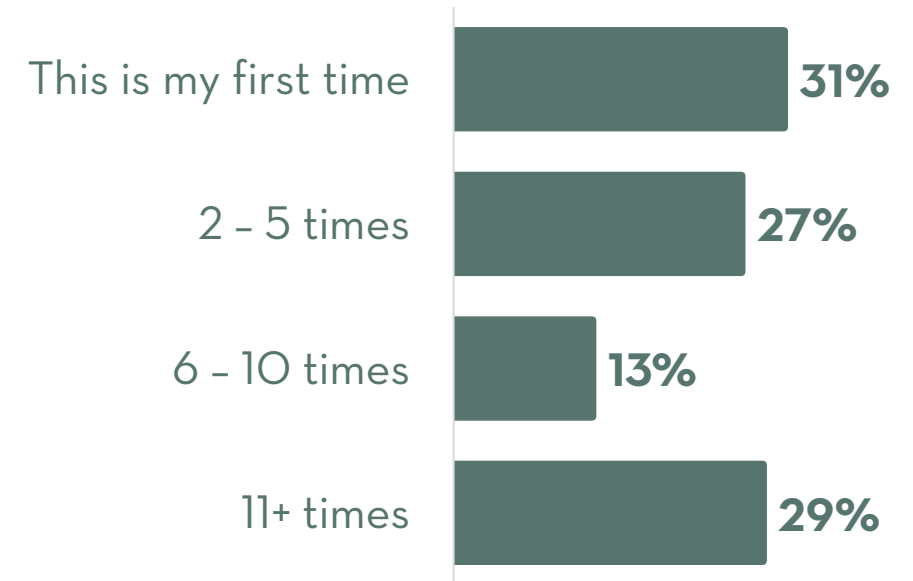
HOUSEHOLD INCOME

- » Typical visitors to Maine earned **\$89,000** per year in household income
- » **17%** of Maine visitors have household incomes that exceed \$150,000



NEW & RETURNING VISITORS

- » **Nearly 1 in 3** visitors were traveling in Maine for the first time
- » Compared to 2020, there were more 1st time visitors

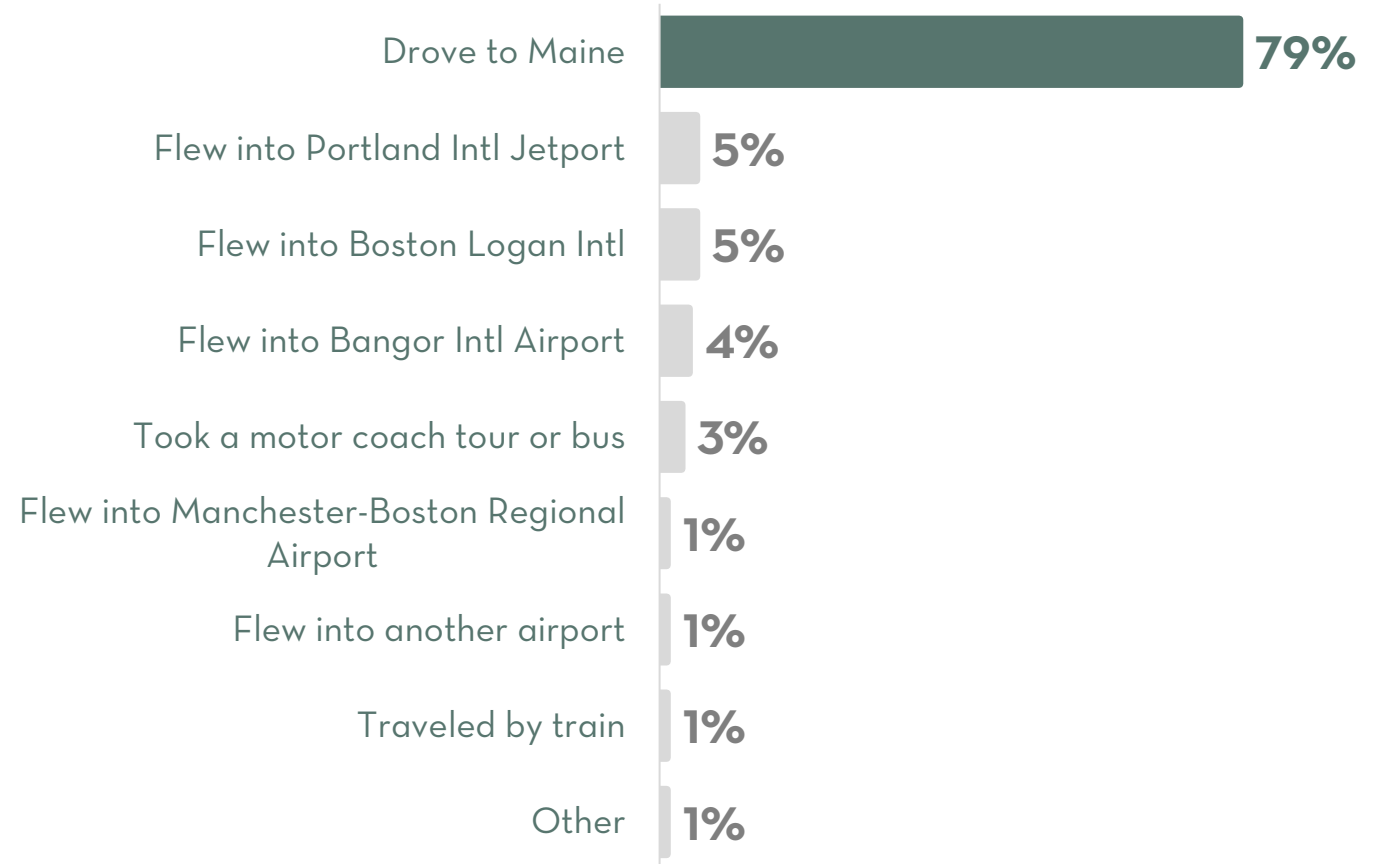


TRIP PLANNING CYCLE : TRIP EXPERIENCE



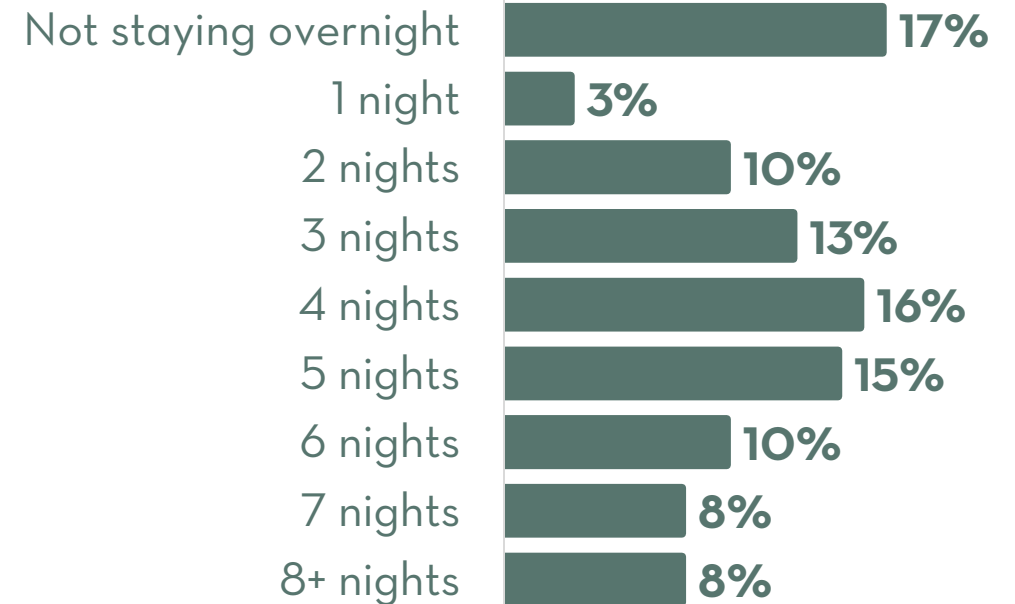
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with nearly **4 out of 5** choosing to travel by car rather than by plane, motor coach/bus, or train
- » The percentage of visitors who flew was **up 8% points** from 2020



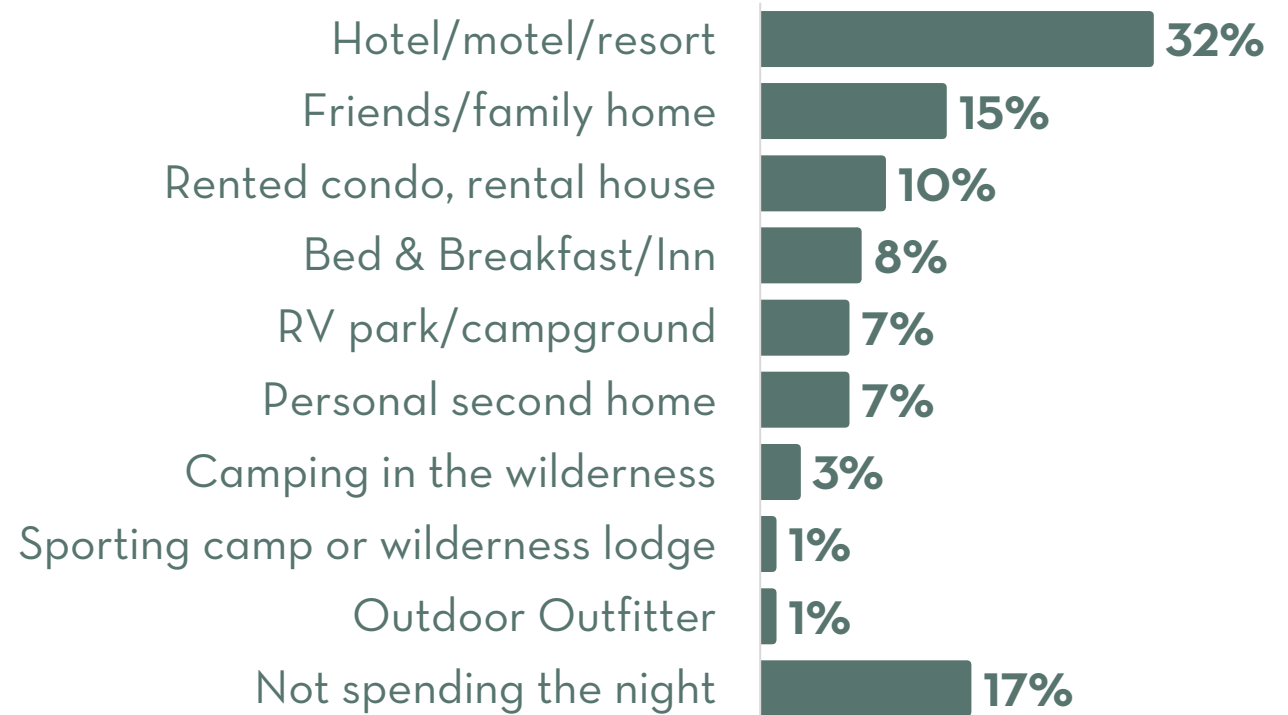
NIGHTS STAYED

- » **83%** of visitors stayed one night or more in *Maine* during their trip
- » Typical visitors stayed **5.4** nights in *Maine*
- » **Over 2 in 5** visitors stayed 5 or more nights in *Maine*



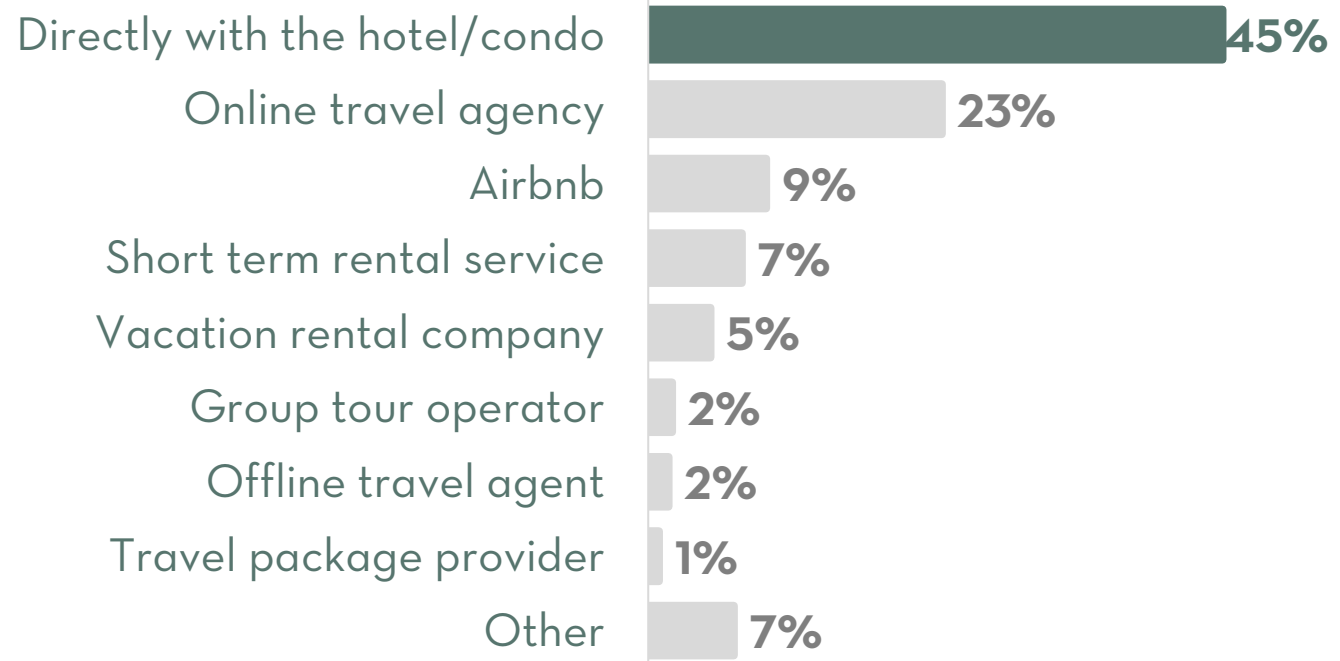
ACCOMMODATIONS

» **Over 1 in 3** visitors to Maine stayed overnight in a hotel, motel or resort



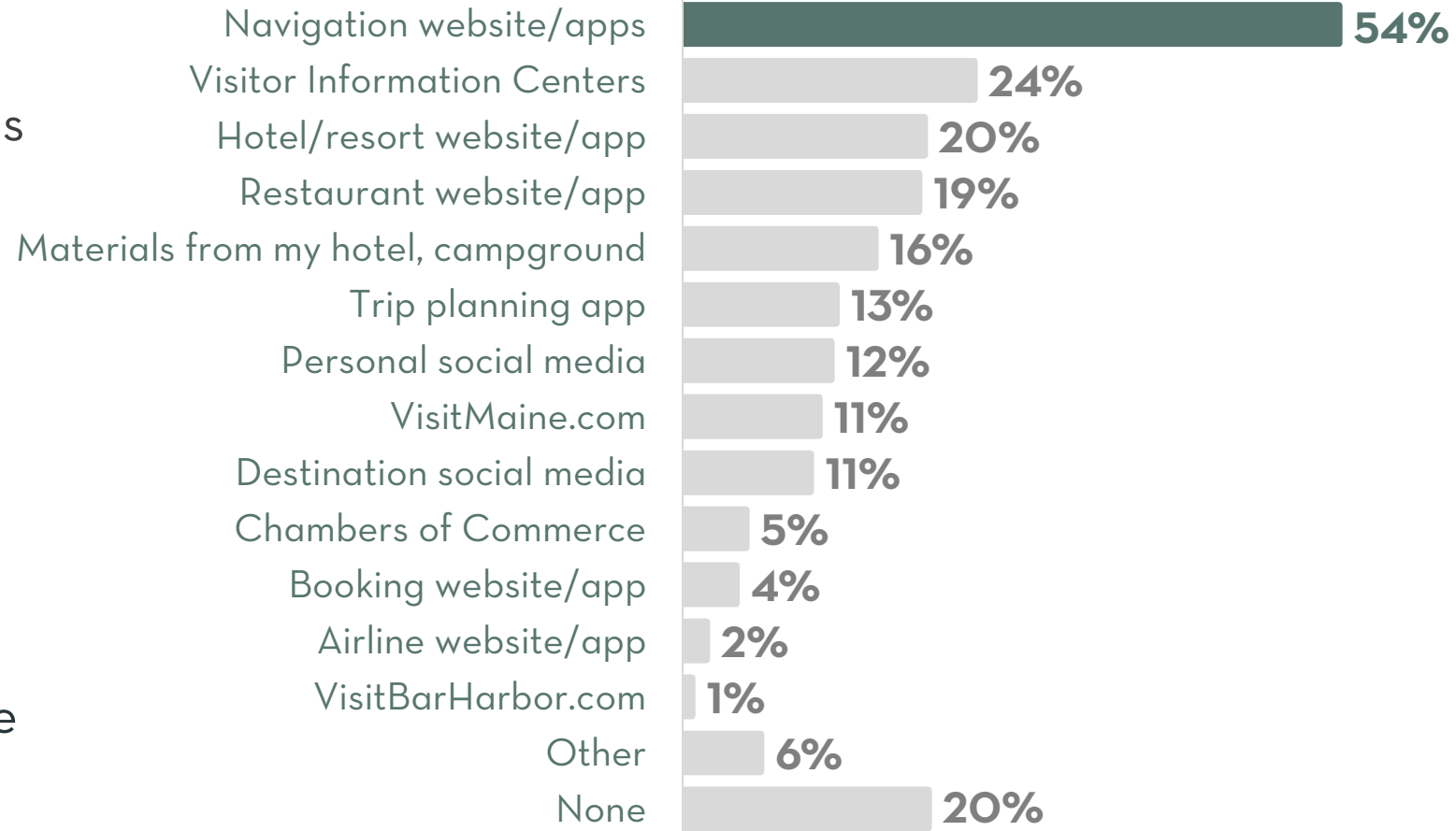
BOOKING METHODS

- » **Nearly 2 in 3** of visitors stayed overnight in paid accommodations during their trip in Maine
- » **Nearly half** of visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



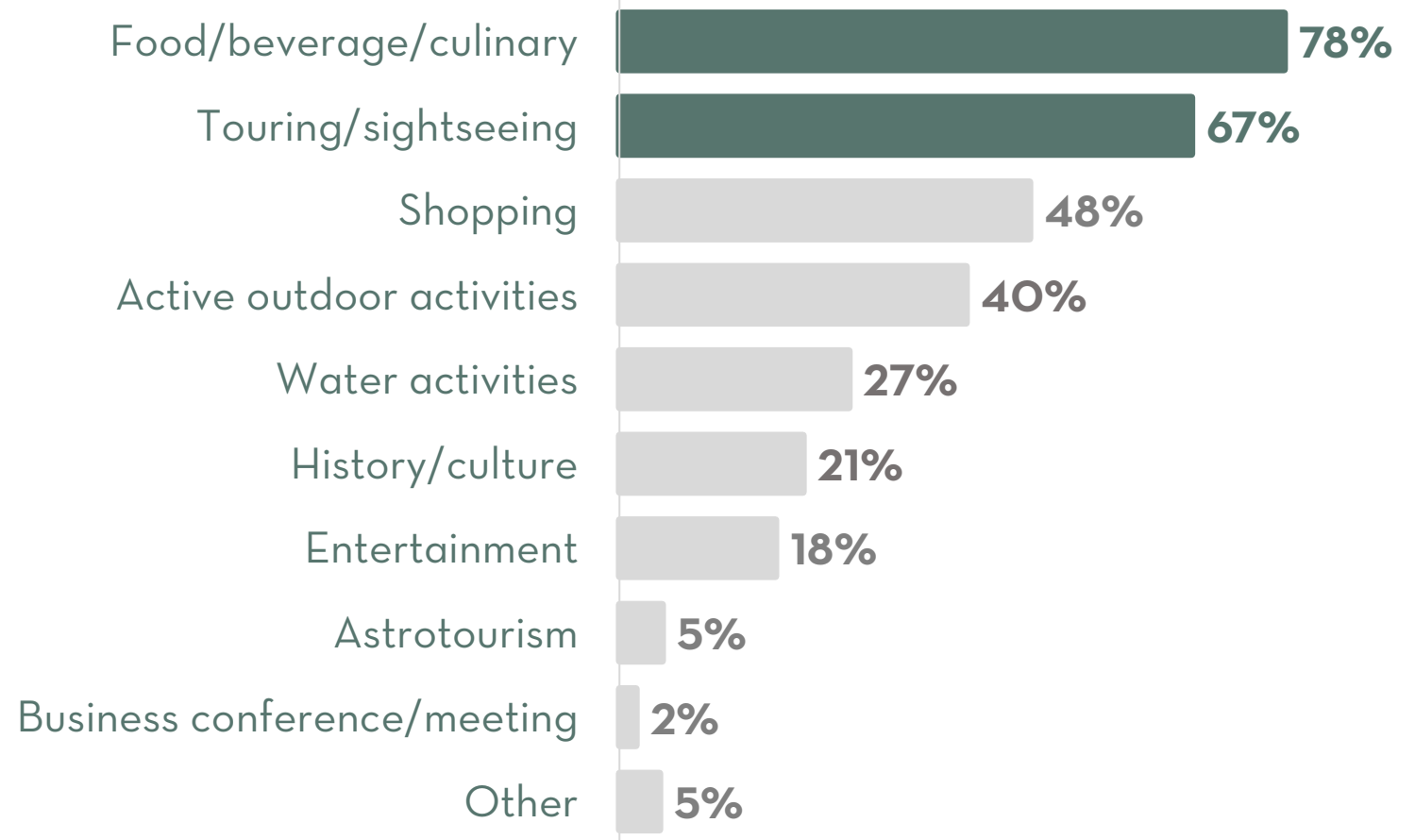
IN-MARKET VISITOR RESOURCES*

- » Visitors were **more likely** to rely on navigation websites and apps to plan activities in-market
- » **1 in 4** visitors used visitor information centers and **1 in 5** visitors used restaurant websites/apps
- » **1 in 5** visitors did not use any resources to plan activities while they were in-market

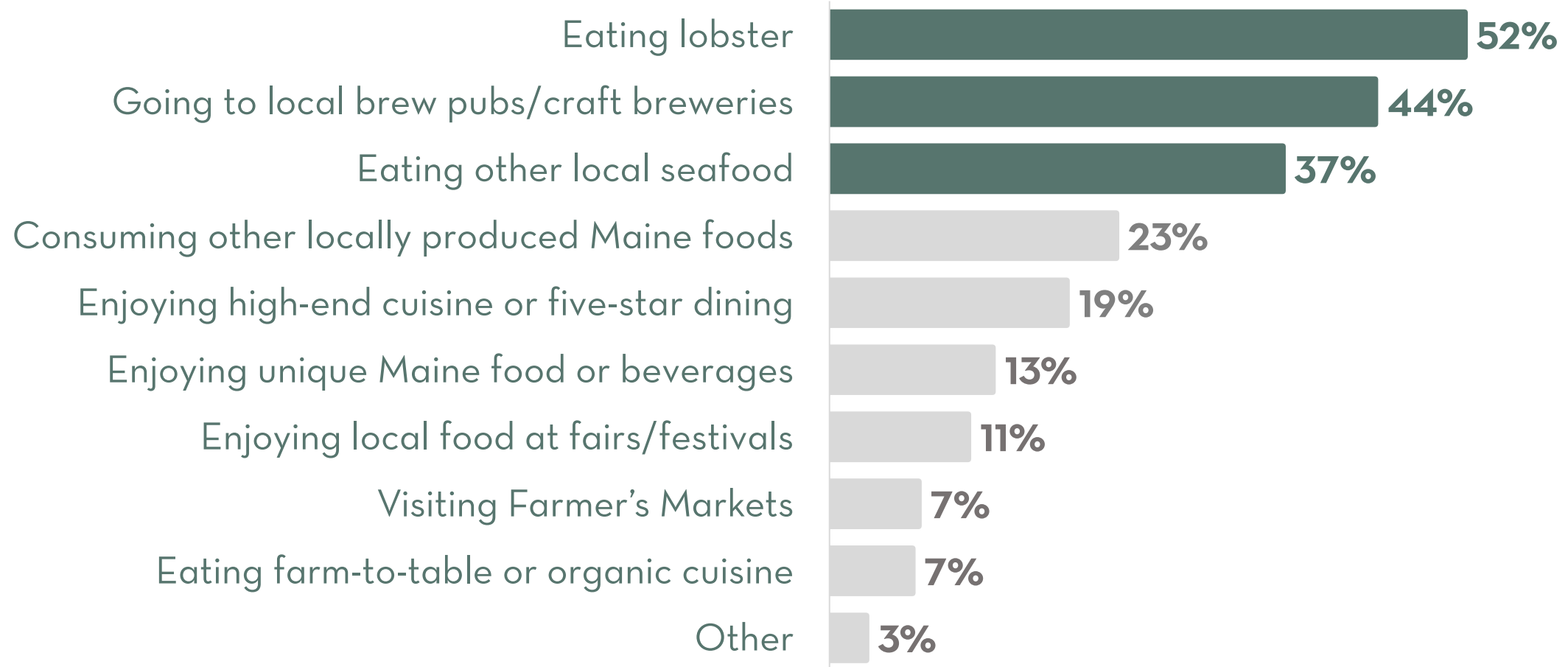


VISITOR ACTIVITIES*

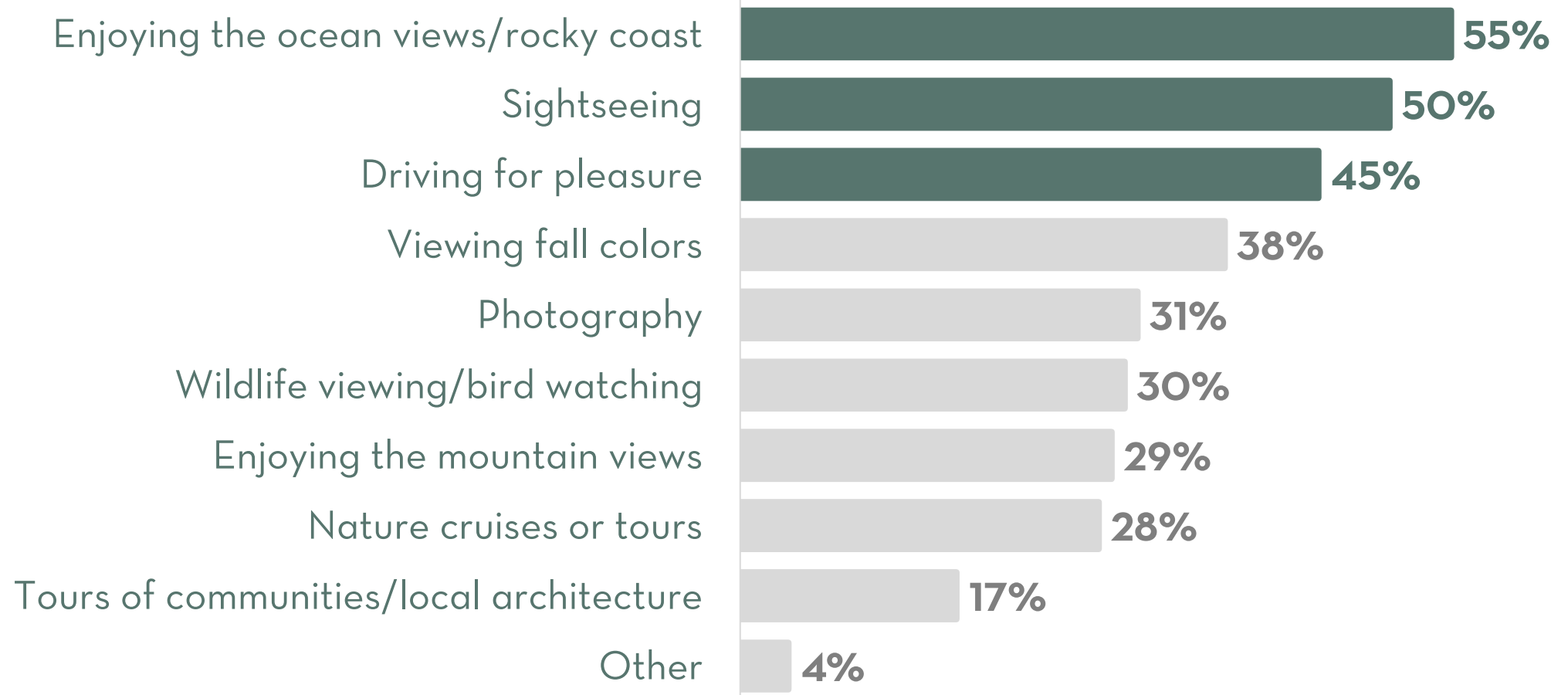
- » **Nearly 4 in 5** visitors participated in food, beverage, and culinary activities during their trip in Maine
- » **Nearly 2 in 3** Maine visitors engaged in touring/sightseeing activities



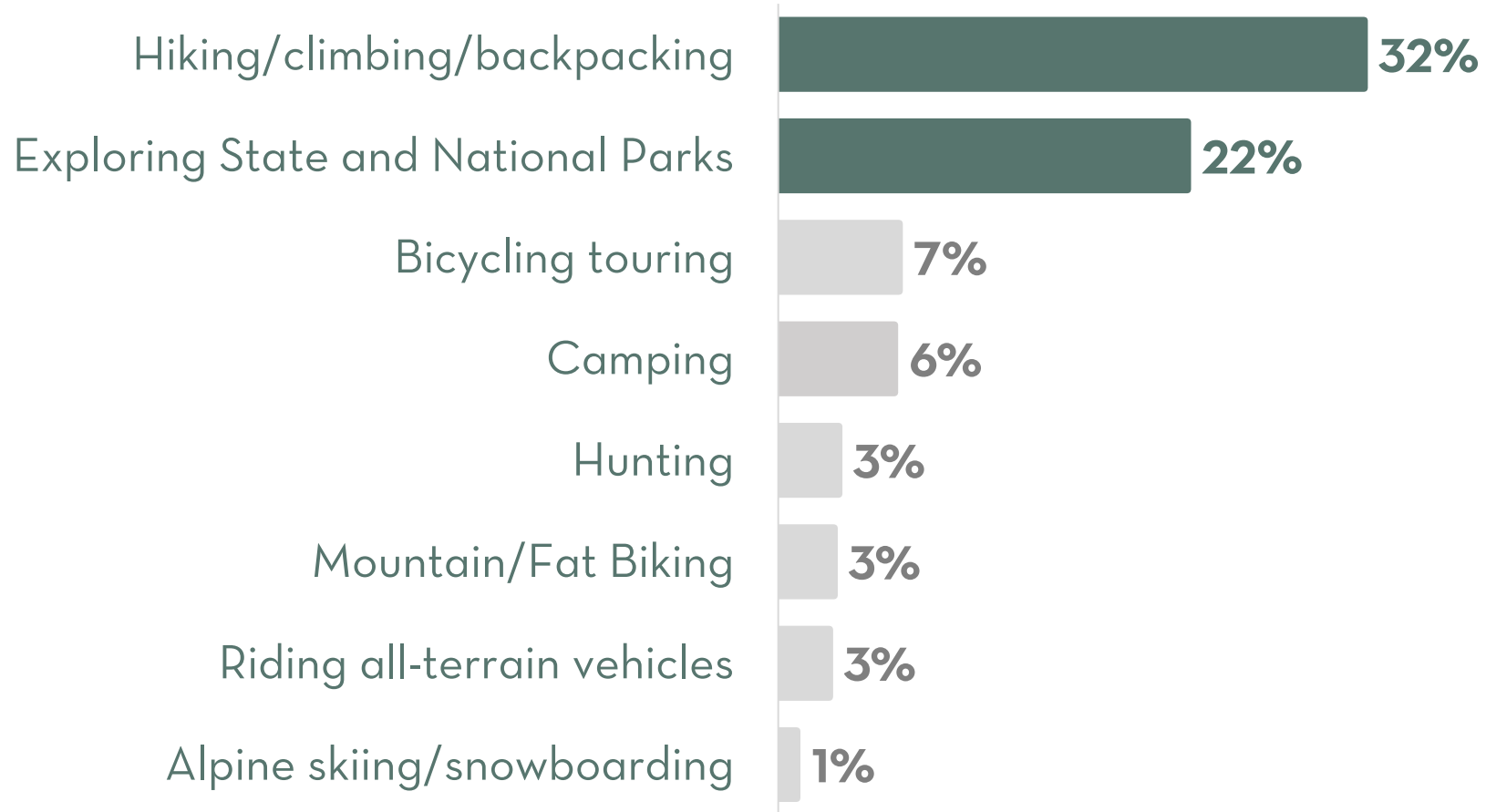
FOOD & BEVERAGE ACTIVITIES*



TOURING & SIGHTSEEING ACTIVITIES*



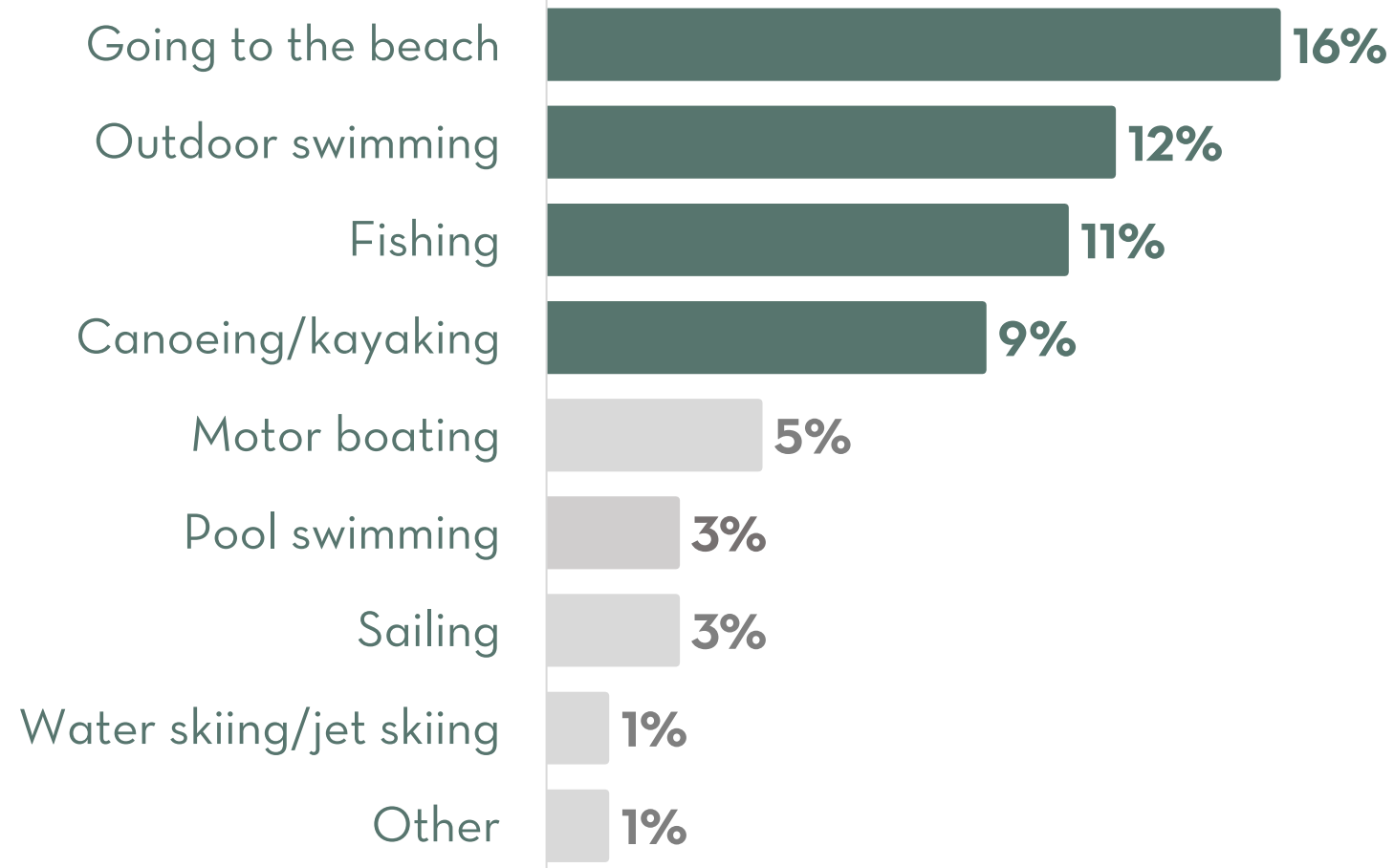
ACTIVE OUTDOOR ACTIVITIES*



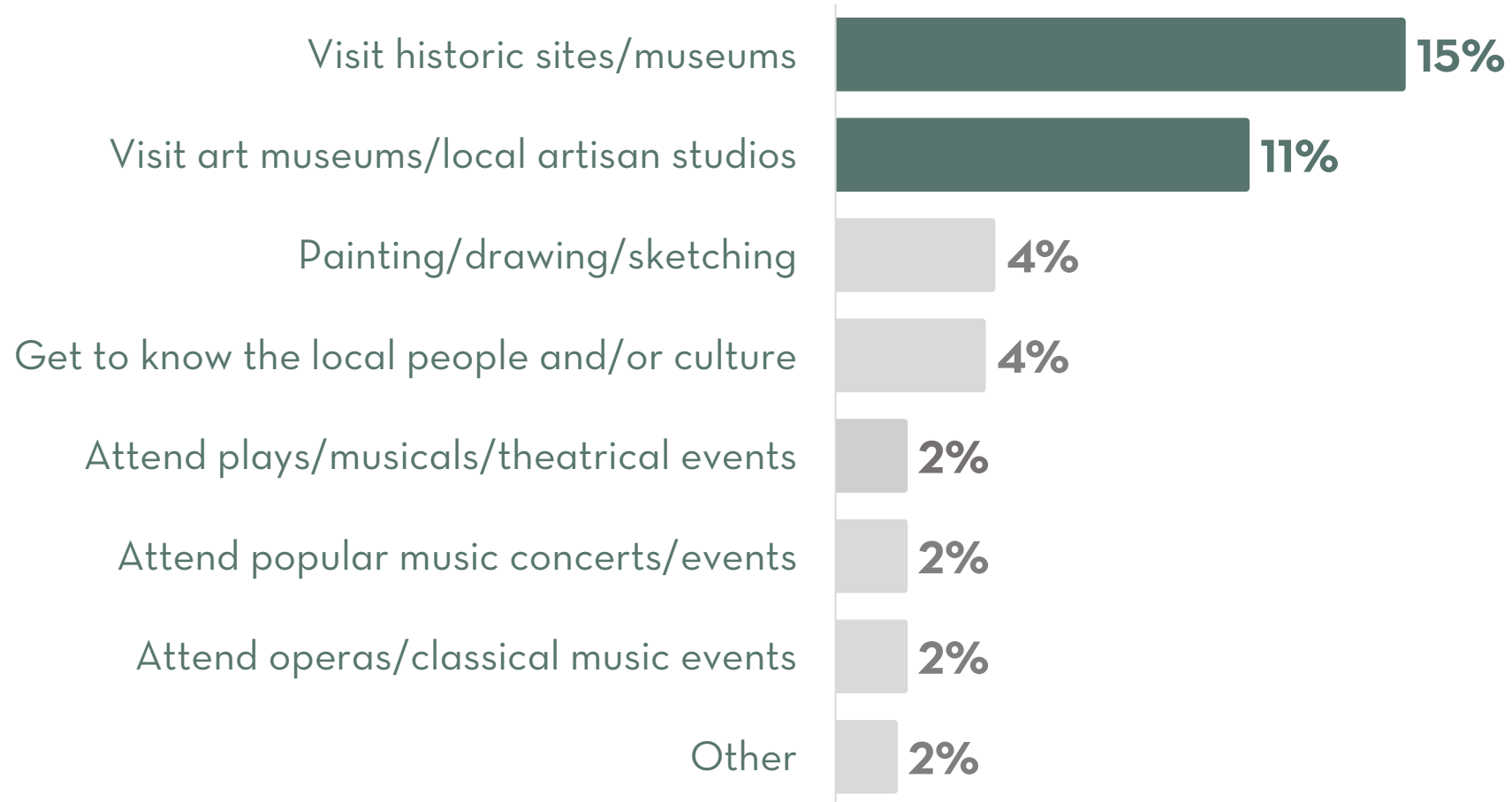
SHOPPING ACTIVITIES*



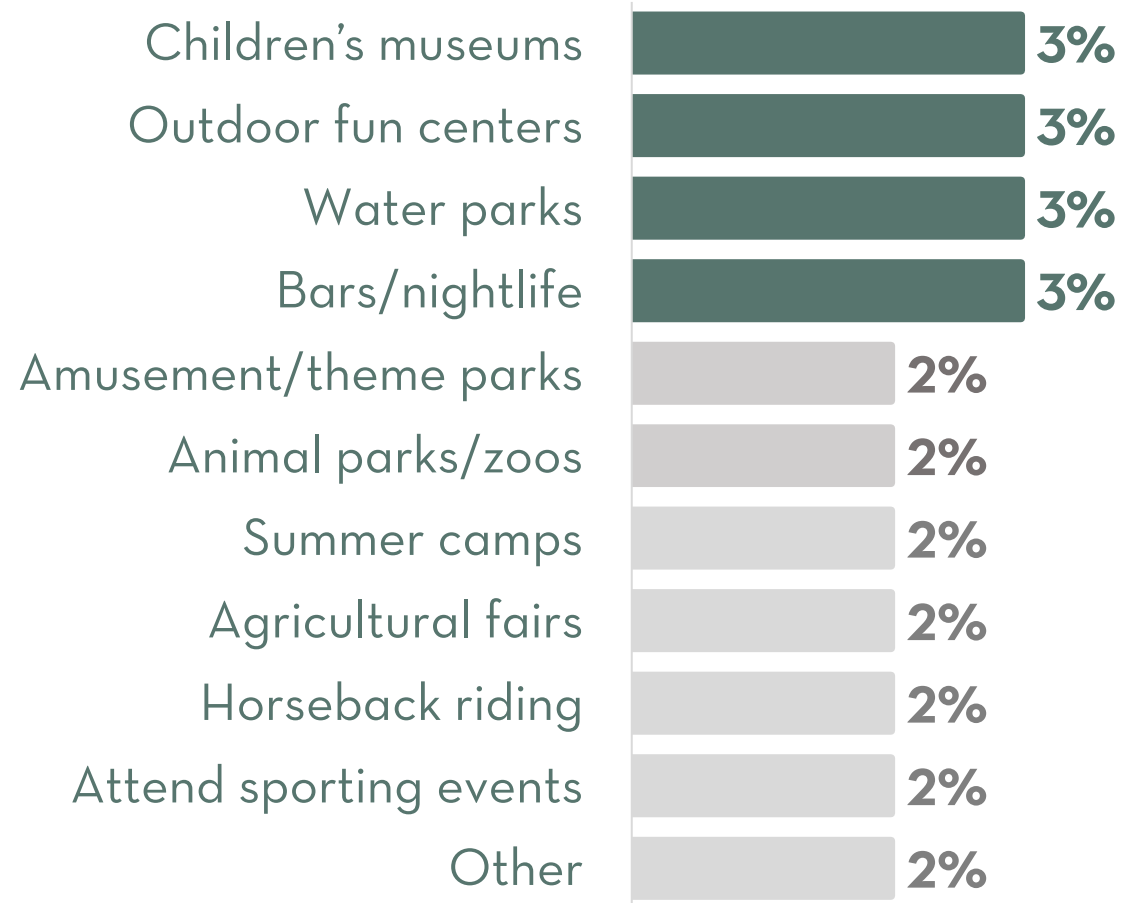
WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

Travel Party Spending Per DAY

| | <i>Paid Lodging</i> | <i>Unpaid Lodging</i> | <i>Day Trippers</i> |
|-------------------------------------|----------------------------|------------------------------|----------------------------|
| <i>Accommodations</i> | <i>\$233</i> | <i>\$0</i> | <i>\$0</i> |
| <i>Transportation</i> | <i>\$38</i> | <i>\$42</i> | <i>\$51</i> |
| <i>Groceries</i> | <i>\$25</i> | <i>\$35</i> | <i>\$21</i> |
| <i>Restaurants</i> | <i>\$119</i> | <i>\$81</i> | <i>\$58</i> |
| <i>Shopping</i> | <i>\$68</i> | <i>\$54</i> | <i>\$63</i> |
| <i>Activities & attractions</i> | <i>\$49</i> | <i>\$36</i> | <i>\$36</i> |
| <i>Other</i> | <i>\$13</i> | <i>\$6</i> | <i>\$7</i> |
| <i>Daily Spending</i> | <i>\$545</i> | <i>\$254</i> | <i>\$236</i> |

TOTAL TRAVEL PARTY SPENDING

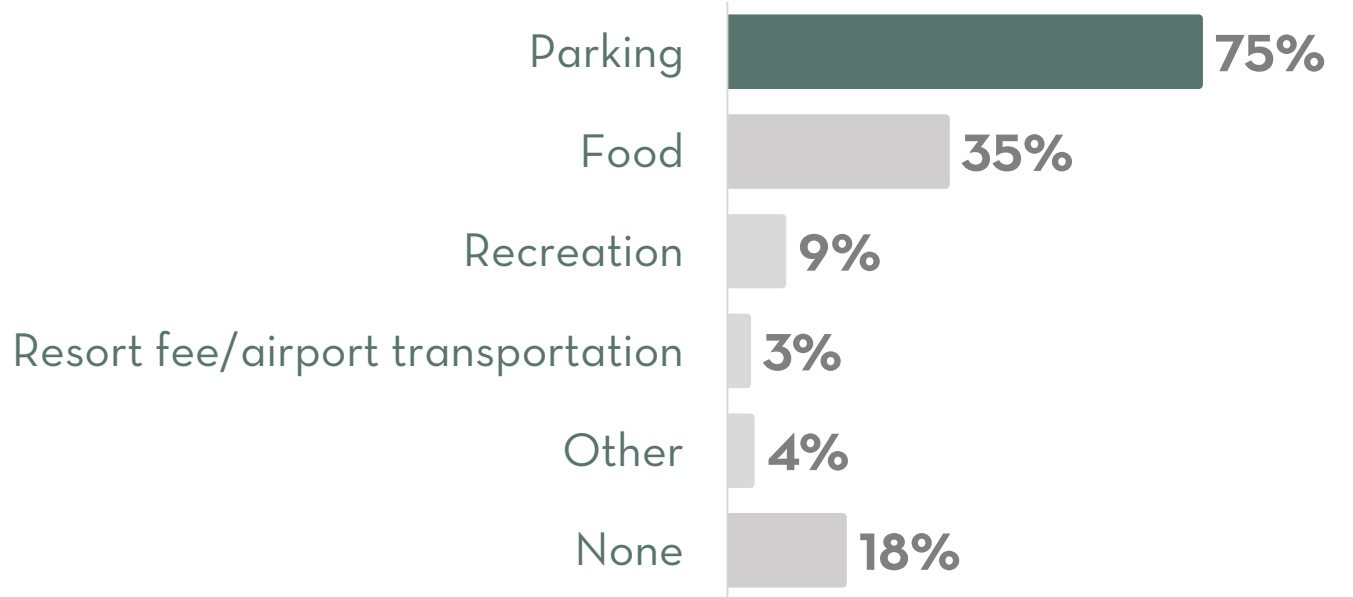
*Travel Party Spending Per **TRIP**¹*

| | <i>Paid Lodging</i> | <i>Unpaid Lodging</i> | <i>Day Trippers</i> |
|-------------------------------------|----------------------------|------------------------------|----------------------------|
| <i>Accommodations</i> | <i>\$1,212</i> | <i>\$0</i> | <i>\$0</i> |
| <i>Transportation</i> | <i>\$198</i> | <i>\$319</i> | <i>\$51</i> |
| <i>Groceries</i> | <i>\$130</i> | <i>\$266</i> | <i>\$21</i> |
| <i>Restaurants</i> | <i>\$619</i> | <i>\$616</i> | <i>\$58</i> |
| <i>Shopping</i> | <i>\$354</i> | <i>\$410</i> | <i>\$63</i> |
| <i>Activities & attractions</i> | <i>\$255</i> | <i>\$274</i> | <i>\$36</i> |
| <i>Other</i> | <i>\$68</i> | <i>\$46</i> | <i>\$7</i> |
| <i>Daily Spending</i> | <i>\$2,836</i> | <i>\$1,931</i> | <i>\$236</i> |

¹Visitors staying in paid lodging stayed an average of 5.2 nights,
Visitors staying in unpaid lodging stayed an average of 7.6 nights.

LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for over **4 out of 5** visitors
- » Price for accommodations included parking for **3 in 4** visitors
- » Food was included in accommodations' pricing for over **1 in 3** visitors



OTHER STATES & PROVINCES VISITED*

- » **2 in 3** visitors did not visit any other U.S. state or Canadian province on their trip
- » Visitors were **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip
- » In 2021, Maine visitors were **more likely** to venture into other states

No other states/provinces

Massachusetts

New Hampshire

New York

Vermont

Connecticut

Rhode Island

Ontario

Other

67%

17%

16%

7%

7%

4%

4%

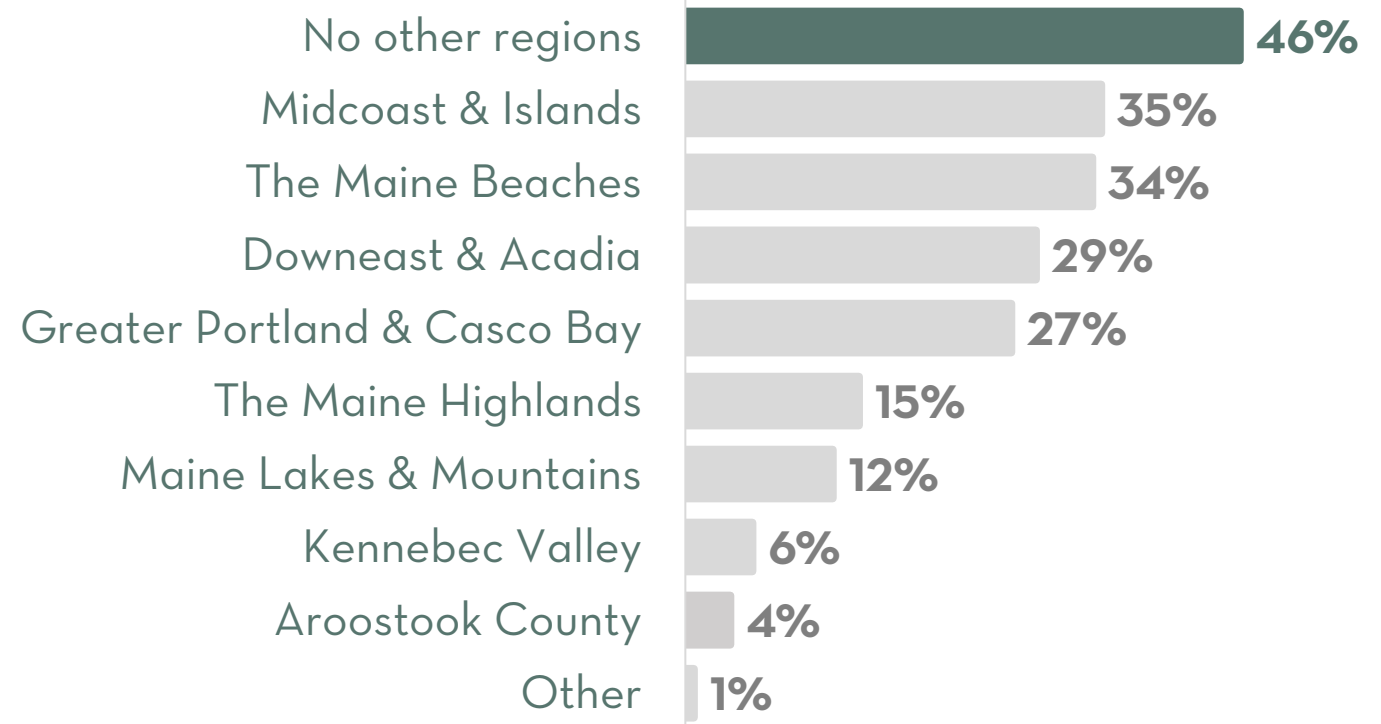
1%

1%

TRAVELING WITHIN MAINE*

- » **Nearly half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state
- » **Over 1 in 3** visitors visited the Midcoast & Islands and Maine Beaches regions in addition to their primary destinations within Maine

Other Regions Visited

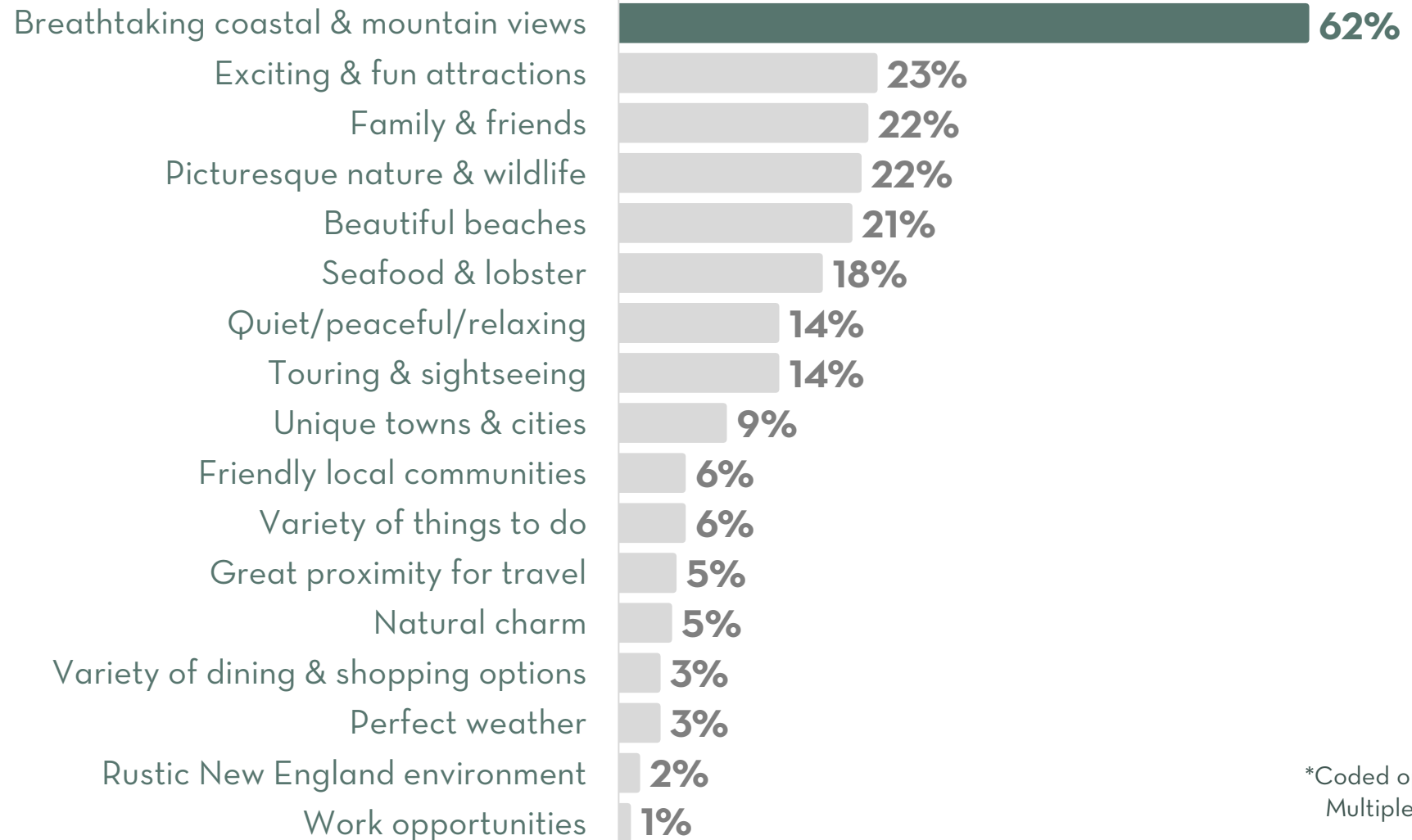


TRIP PLANNING CYCLE : POST-TRIP EVALUATION



MAINE AS A UNIQUE DESTINATION*

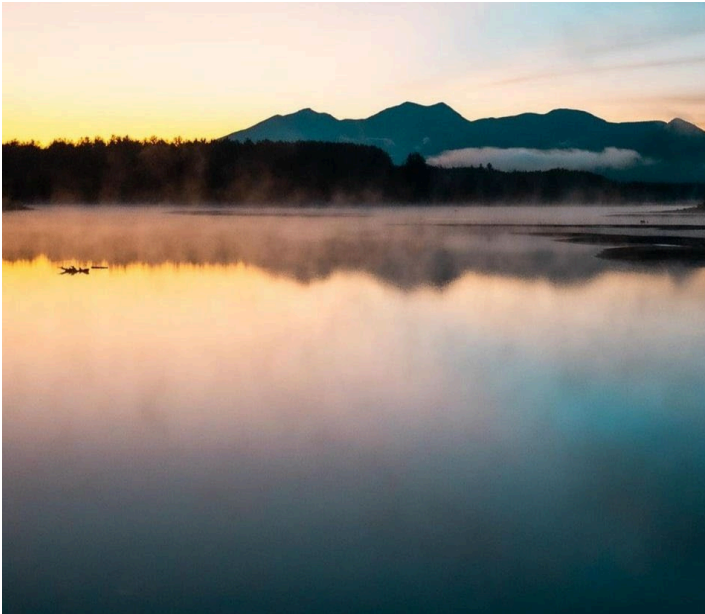
“What does Maine offer that other similar destinations do not offer?”



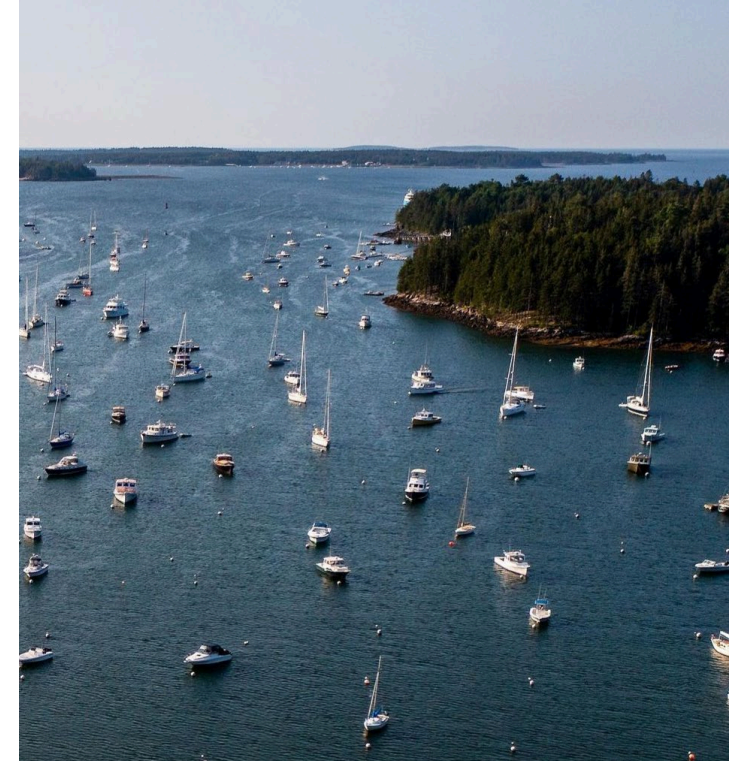
*Coded open-ended responses.
Multiple responses permitted.

UNIQUENESS: “BREATHTAKING COSTAL & MOUNTAIN VIEWS”

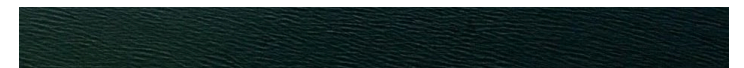
“Maine had a lot of scenic views that are refreshing and people are very friendly. Lobsters taste fresh and delicious. Also, the houses are beautiful like from a story book. Acadia National Park is awesome. Maine is so clean.”



“Its coastline, its lighthouses, its lobsters, its national parks, and its friendly and relaxing environment.”



“A beautiful coastline, great beaches, great seafood, friendly people, safe, secure, and relaxing environment.”

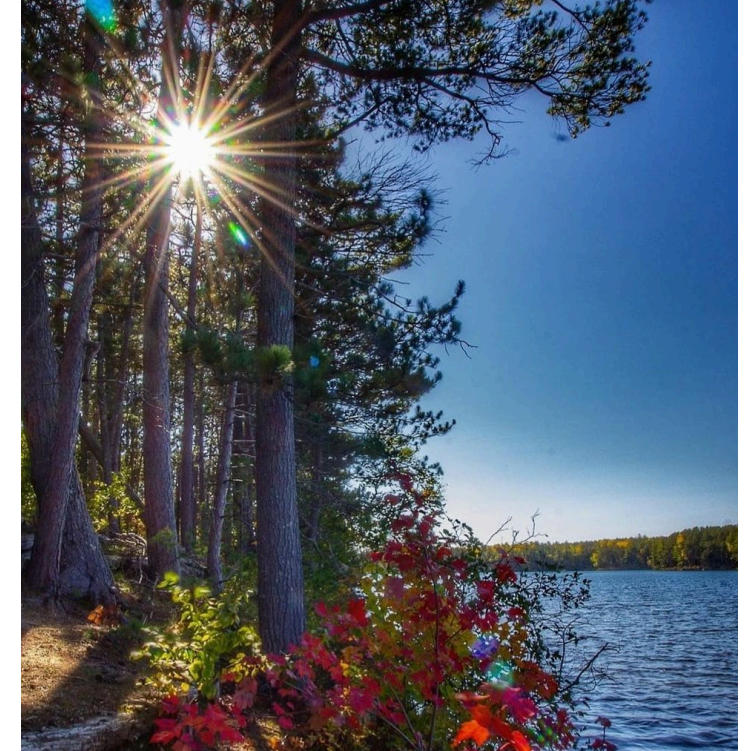


UNIQUENESS: “EXCITING & FUN ATTRACTIONS”

“Anything you could imagine. You have city you have country you have malls you have beaches... you have snowmobile trails, jeep trails, hiking trails, biking trails, anything you could ever want in Maine is here.”

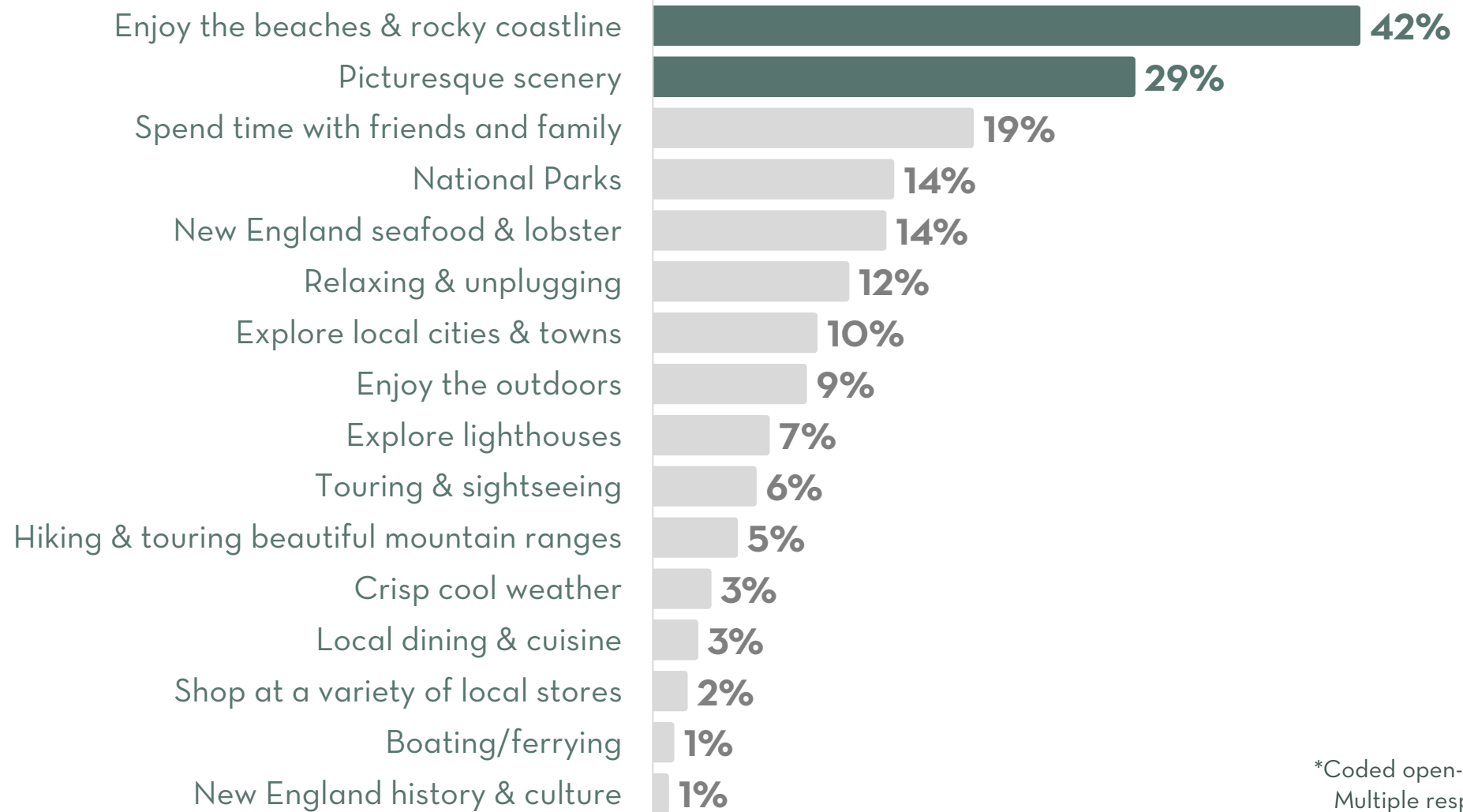


“Maine has every type of attraction. You can drive from the coast to the mountains in no time. It's a quiet place to relax and unwind. There are busy cities and secluded locations. It offers any person any type of interest.”



“Scenic coastline, national parks, beautiful beaches, lighthouses, and great seafood.”

HIGHLIGHT OF TRIP*



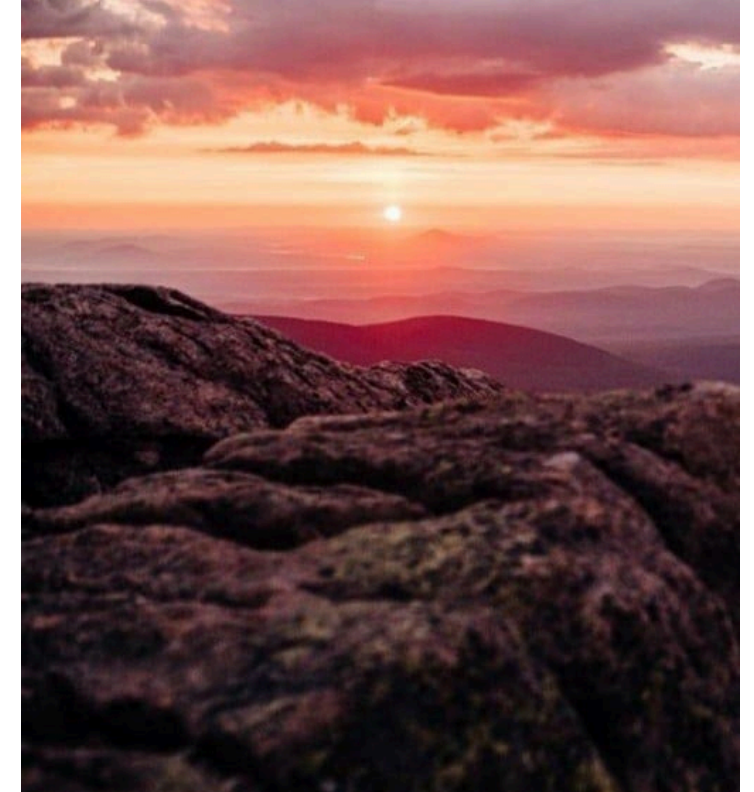
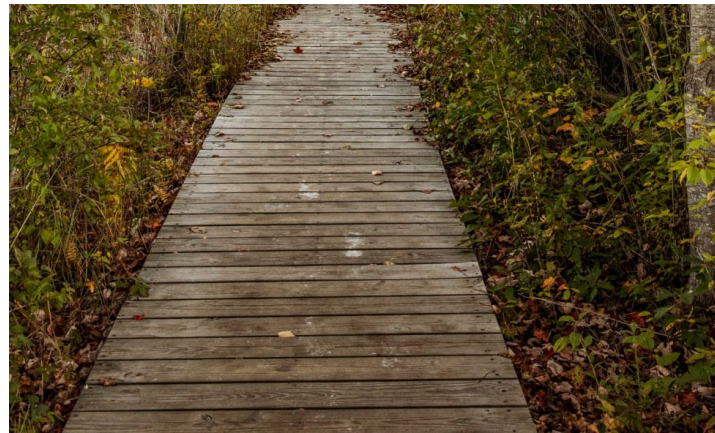
*Coded open-ended responses.
Multiple responses permitted.

HIGHLIGHTS: “ENJOY THE BEACHES & ROCKY COASTLINE”

“Beautiful beaches, scenic views, a clean environment and friendly people.”



“A beautiful coastline, lighthouses, scenic views, a variety of beaches, great national parks and good seafood.”



“Beautiful coast, peaceful way of life.”

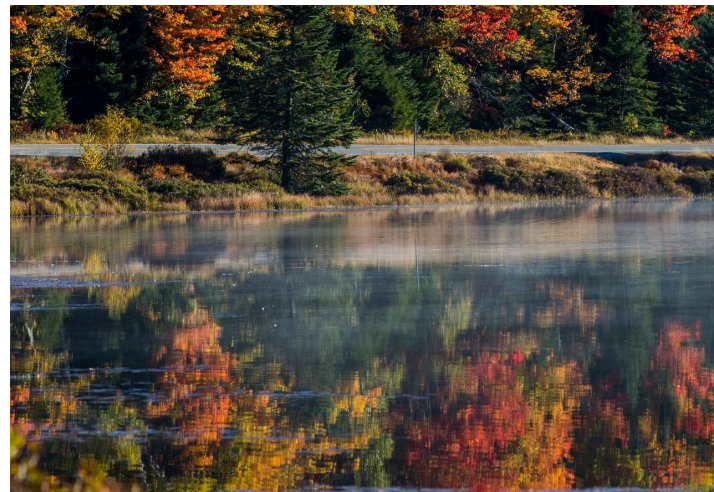
HIGHLIGHTS: “PICTURESQUE SCENERY”



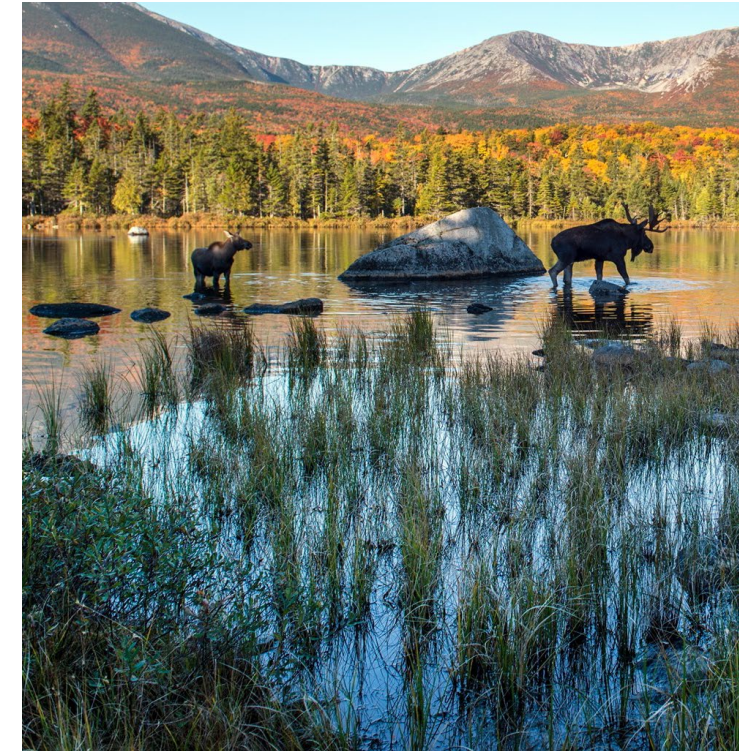
“Plenty of beautiful sceneries, great coastline & beaches, national parks, lighthouses, and more.”



“Scenic views, fall foliage, beautiful coastline & mountains.”



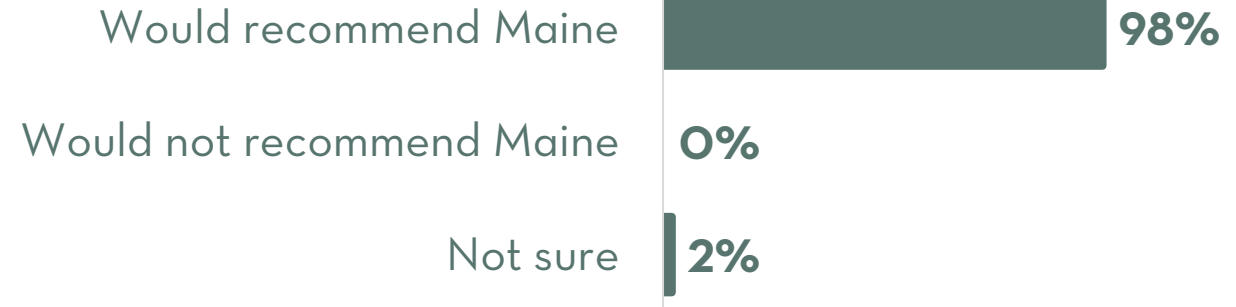
“Beautiful sceneries, lighthouses, rocky coastline, friendly people, great seafood, all of them you will find them in Maine!”



RECOMMENDING MAINE & ITS REGIONS

» **98%** of visitors would recommend that their friends and family visit Maine

Likelihood of Recommending Maine

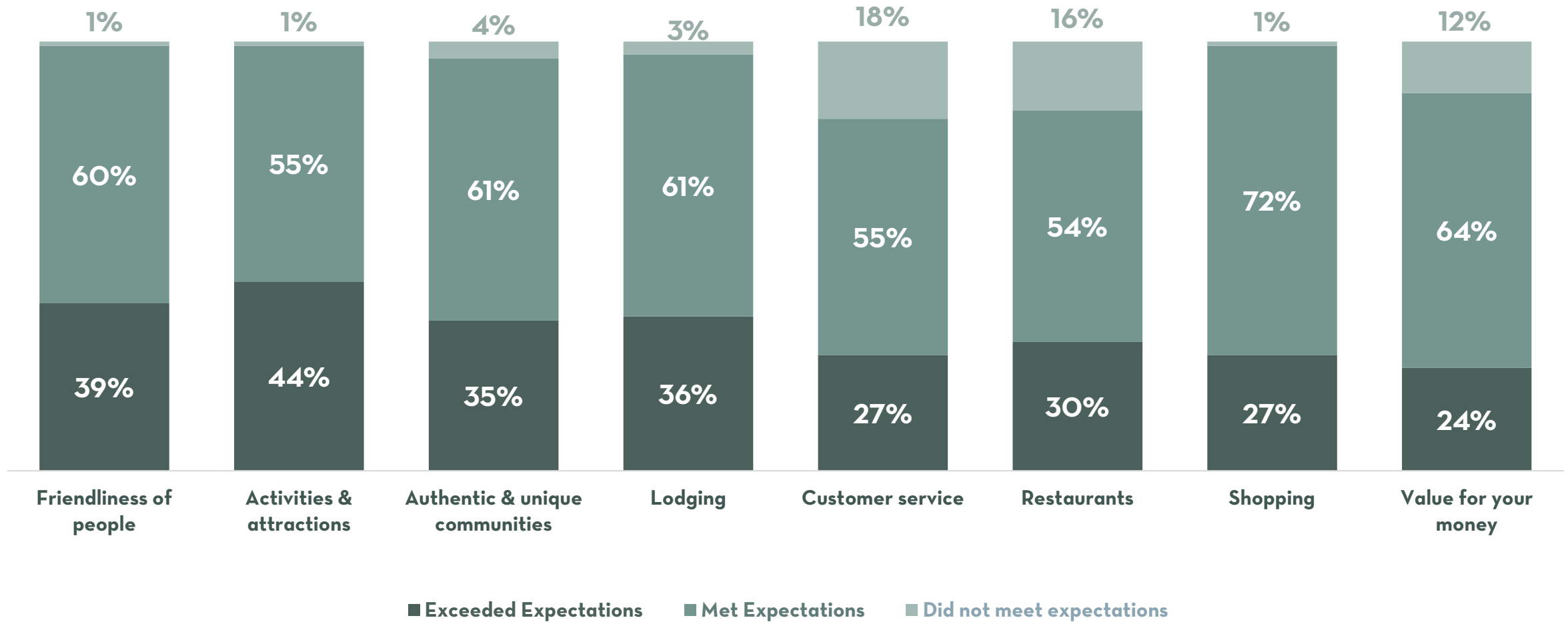


» **94%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip (77% would definitely recommend the region they visited)

Likelihood of Recommending Region Visited



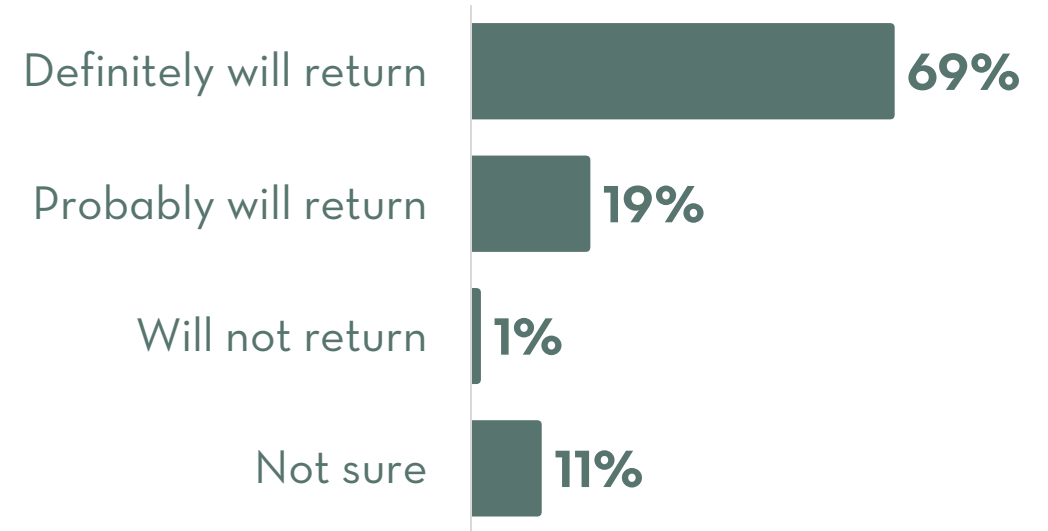
TRIP EXPECTATIONS¹



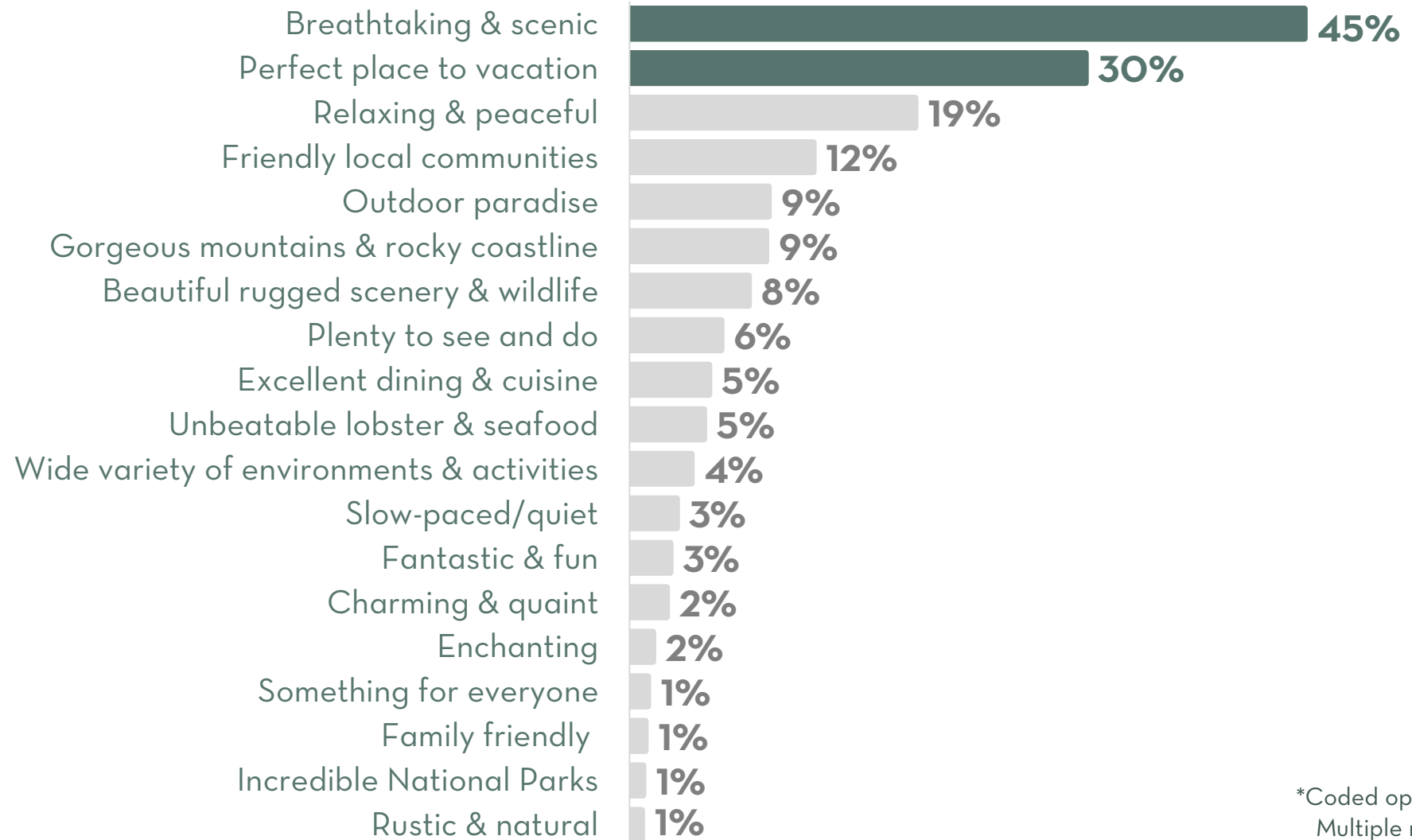
¹"Don't know" responses omitted.

LIKELIHOOD OF RETURNING TO MAINE

- » **88%** of visitors will return to Maine for a future visit or vacation



PERCEPTIONS OF MAINE*



*Coded open-ended responses.
Multiple responses permitted.

PERCEPTIONS: “BREATHTAKING & SCENIC”

“Maine has everything to make tourists happy: scenic views, beautiful beaches, great coastline, friendly inhabitants, and a relaxing environment.”



“As soon as you step in Maine you see the difference – everything is beautiful, relaxing and friendly.”



“Maine has beautiful sceneries, wild coastline & beaches that will make you come back, year after year.”

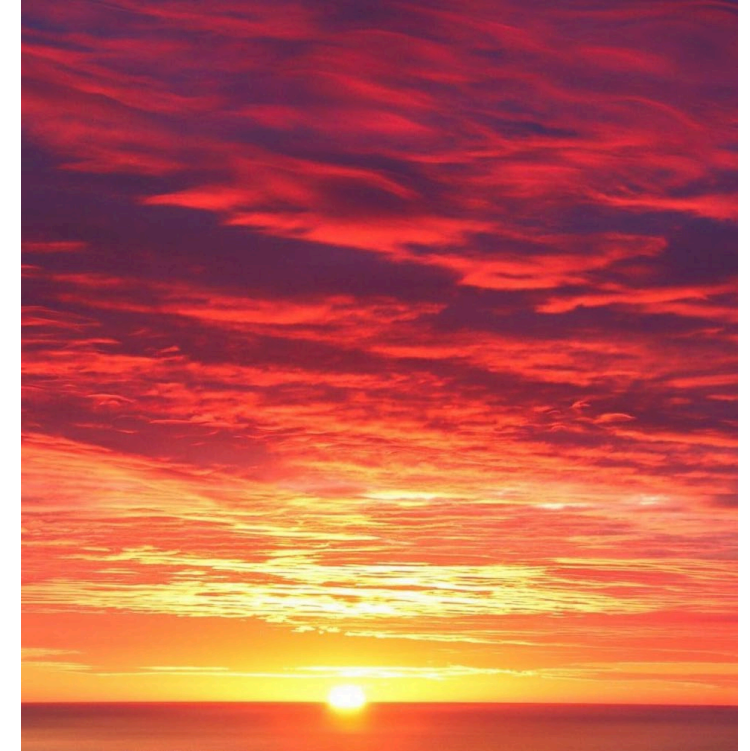


PERCEPTIONS: “PERFECT PLACE TO VACATION”

“Vacationland is the perfect description. Tons to do. Refreshing getaway.”



“The best place to enjoy vacation in a relaxing and beautiful environment.”



“We’ve been coming to Maine every year for decades and plan to keep coming until we’re unable to drive. That’s how much we love this state.”

YEAR-OVER-YEAR COMPARISONS



TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

| | Fall 2020 | Fall 2021 |
|-------------------|-----------|-----------|
| A week or less | 21% | 11% |
| 2 - 3 weeks | 21% | 14% |
| 1 - 2 months | 30% | 27% |
| 3 - 4 months | 12% | 18% |
| 5 - 6 months | 7% | 12% |
| 7 months - 1 year | 4% | 11% |
| More than 1 year | 5% | 7% |

BOOKED ACCOMMODATIONS/MADE TRIP DECISIONS

| | Fall 2020 | Fall 2021 |
|-------------------|-----------|-----------|
| A week or less | 28% | 15% |
| 2 - 3 weeks | 23% | 15% |
| 1 - 2 months | 30% | 29% |
| 3 - 4 months | 9% | 17% |
| 5 - 6 months | 4% | 12% |
| 7 months - 1 year | 3% | 10% |
| More than 1 year | 3% | 3% |

ONLINE TRIP PLANNING SOURCES*

| | Fall 2020 | Fall 2021 |
|--------------------------------|-----------|-----------|
| Online search engines | 32% | 42% |
| Hotel websites | 9% | 18% |
| TripAdvisor | 10% | 17% |
| VisitMaine.com | 5% | 16% |
| Online travel agency | 15% | 16% |
| MaineTourism.com | 3% | 13% |
| Airbnb | 8% | 9% |
| VRBO/HomeAway | 3% | 9% |
| Traveler reviews/blogs/stories | 9% | 9% |
| Instagram | 8% | 7% |
| Vacation rental websites | 2% | 7% |
| Visit Maine social media | 2% | 7% |
| Facebook | 14% | 6% |
| Airline websites | 7% | 6% |
| YouTube | 2% | 5% |
| DowneastAcadia.com | 4% | 5% |
| DiscoverNewEngland.com | 2% | 3% |
| TheMaineBeaches.com | 1% | 3% |
| VisitPortland.com | 2% | 2% |
| MaineLakesandMountains.com | 1% | 2% |
| Twitter | 2% | 2% |
| VisitBarHarbor.com | 2% | 2% |
| VisitAroostook.com | 1% | 1% |
| KennebecValley.org | 1% | 1% |
| TheMaineHighlands.com | 1% | 1% |
| MainesMidCoast.com | 1% | 1% |
| Other | 6% | 7% |
| None | 36% | 24% |

OTHER TRIP PLANNING SOURCES*

| | Fall 2020 | Fall 2021 |
|--|--------------|--------------|
| Advice from friends/family | 37% | 35% |
| Articles or travelogues | 4% | 14% |
| Travel guides/brochures | 8% | 13% |
| AAA | 3% | 12% |
| Called the Maine Office of Tourism | 1% | 8% |
| Travel books & magazines | 5% | 8% |
| Visitor Guide | 1% | 5% |
| Travel planning apps | 6% | 5% |
| Travel agent | 1% | 3% |
| Visit Maine e-newsletter | 1% | 2% |
| Called local convention and visitors bureaus | 2% | 1% |
| Called local Chambers of Commerce | 1% | 1% |
| Called another Maine Tourism/Lodging Association | 1% | 1% |
| Other | 3% | 4% |
| None | 52% | 40% |

REASON FOR VISITING*

| | Fall 2020 | Fall 2021 |
|--------------------------------|-----------|-----------|
| Sightseeing/touring | 21% | 42% |
| Relax and unwind | 18% | 37% |
| Nature, environment | 12% | 26% |
| Visiting friends/relatives | 29% | 21% |
| Beach | 6% | 15% |
| Fishing, hunting, hiking, etc. | 16% | 12% |
| Special occasion | 11% | 11% |
| Attractions | 6% | 9% |
| Shopping | 11% | 7% |
| Water activities | 6% | 4% |
| Culture/museums/history | 5% | 4% |
| Special event | 5% | 3% |
| Conference/meeting | 5% | 2% |
| Astrotourism | N/A | 1% |
| Sporting event | 1% | 0% |
| Other | 7% | 10% |

*Multiple responses permitted.

Large increases from previous year are due to removing "vacation" as an option for visitors to select.

OTHER STATES/PROVINCES CONSIDERED*

| | Fall 2020 | Fall 2021 |
|---------------------------|-----------|-----------|
| No other states/provinces | 73% | 70% |
| New Hampshire | 12% | 16% |
| Massachusetts | 8% | 10% |
| Vermont | 7% | 9% |
| New York | 4% | 6% |
| Rhode Island | 4% | 5% |
| Connecticut | 2% | 3% |
| New Brunswick | 1% | 1% |
| Newfoundland and Labrador | 0% | 1% |
| Nova Scotia | 1% | 1% |
| Ontario | 0% | 1% |
| Prince Edward Island | 0% | 1% |
| Quebec | 1% | 1% |
| Other | 7% | 3% |

ADVERTISING/PROMOTIONS

| | Fall 2020 | Fall 2021 |
|--|-----------|-----------|
| Noticed Advertising/Promotions | 36% | 41% |
| Type of Promotion*: | | |
| Internet | 35% | 34% |
| Social media | 31% | 28% |
| Cable or satellite television | 28% | 20% |
| Magazine | 14% | 19% |
| Radio | 15% | 11% |
| Traveler reviews/blogs | 13% | 10% |
| Maine travel/visitor guide | 11% | 8% |
| VisitMaine.com | 6% | 7% |
| Newspaper | 6% | 7% |
| Online streaming service | 7% | 6% |
| Online music/podcast streaming service | 7% | 5% |
| Billboard | 5% | 4% |
| Brochure | 5% | 4% |
| Deal - based promotion | 3% | 3% |
| AAA | 1% | 3% |
| Other | 6% | 5% |
| Not sure | 2% | 3% |

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

| | Fall 2020 | Fall 2021 |
|---------------------|-----------|-----------|
| New England | 56% | 50% |
| Mid Atlantic | 24% | 26% |
| Southeast | 10% | 11% |
| Southwest | 2% | 3% |
| Midwest | 5% | 6% |
| West | 3% | 3% |
| Canada | 0% | 0.5% |
| Other International | 0% | 0.5% |

ORIGIN STATE/PROVINCE

| | Fall 2020 | Fall 2021 |
|----------------|-----------|-----------|
| Maine | 23% | 17% |
| Massachusetts | 11% | 16% |
| New York | 9% | 12% |
| Connecticut | 5% | 8% |
| New Hampshire | 14% | 6% |
| New Jersey | 5% | 5% |
| Pennsylvania | 3% | 5% |
| Florida | 4% | 4% |
| Virginia | 2% | 3% |
| Vermont | 2% | 3% |
| Maryland | 2% | 2% |
| North Carolina | 2% | 2% |

ORIGIN MARKET

| | Fall 2020 | Fall 2021 |
|---------------------------|-----------|-----------|
| New York City | 10% | 10% |
| Boston | 5% | 8% |
| Washington DC - Baltimore | 4% | 4% |
| Philadelphia | 3% | 3% |
| Albany | 1% | 3% |
| Providence | 1% | 2% |
| Chicago | 1% | 2% |

TRAVEL PARTY SIZE/COMPOSITION

| | Fall 2020 | Fall 2021 |
|----------------------------|-----------|-----------|
| Travel Party Size | 2.4 | 2.7 |
| Traveled alone | 20% | 12% |
| As a couple | 46% | 53% |
| With family | 19% | 23% |
| With other couples/friends | 12% | 9% |
| With business associates | 1% | 1% |
| In a tour group | 0% | 1% |
| Other | 1% | 1% |

TRAVEL WITH CHILDREN*

| | Fall 2020 | Fall 2021 |
|-------------------------|-----------|-----------|
| No children | 89% | 85% |
| Children younger than 6 | 4% | 4% |
| Children 6 - 12 | 5% | 7% |
| Children 13 - 17 | 5% | 4% |

DEMOGRAPHIC PROFILE

| Gender of Person Interviewed | Fall 2020 | Fall 2021 |
|------------------------------|-----------|-----------|
| Male | 49% | 47% |
| Female | 51% | 53% |

| Education | Fall 2020 | Fall 2021 |
|--------------------------------------|-----------|-----------|
| High school or less | 11% | 5% |
| Some college or technical school | 22% | 12% |
| College or technical school graduate | 46% | 59% |
| Graduate school | 21% | 24% |

| Income | Fall 2020 | Fall 2021 |
|-----------------------|-----------|-----------|
| Less than \$25,000 | 7% | 3% |
| \$25,000 - \$49,999 | 16% | 9% |
| \$50,000 - \$74,999 | 20% | 24% |
| \$75,000 - \$99,999 | 19% | 25% |
| \$100,000 - \$149,999 | 19% | 21% |
| \$150,000 - \$199,999 | 9% | 9% |
| \$200,000 - \$249,999 | 4% | 4% |
| \$250,000 or more | 6% | 4% |

DEMOGRAPHIC PROFILE

| Employment | Fall 2020 | Fall 2021 |
|------------------------------|-----------|-----------|
| Employed full-time | 53% | 53% |
| Employed part-time | 10% | 12% |
| Contract/freelance/temporary | 8% | 7% |
| Retired | 18% | 21% |
| Not currently employed | 4% | 4% |
| Student | 7% | 3% |

| Race | Fall 2020 | Fall 2021 |
|------------|-----------|-----------|
| White | 86% | 87% |
| Asian | 3% | 6% |
| Black | 1% | 2% |
| Hispanic | 5% | 2% |
| Indigenous | 1% | 1% |
| Other | 1% | 2% |

| Marital Status | Fall 2020 | Fall 2021 |
|------------------------------|-----------|-----------|
| Single/widowed | 31% | 18% |
| Married/domestic partnership | 69% | 82% |

NEW & RETURNING VISITORS

| | Fall 2020 | Fall 2021 |
|-----------------------|-----------|-----------|
| This is my first time | 26% | 31% |
| 2 - 5 times | 28% | 27% |
| 6 - 10 times | 13% | 13% |
| 11+ times | 33% | 29% |

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

| | Fall 2020 | Fall 2021 |
|---------------------------------|-----------|-----------|
| Drove to Maine | 87% | 79% |
| Flew into Portland Intl Jetport | 6% | 5% |
| Flew into Boston Logan Intl | 2% | 5% |
| Flew into Bangor Intl Airport | 2% | 4% |
| Took a motor coach tour or bus | 1% | 3% |
| Traveled by train | 1% | 1% |
| Other | 1% | 3% |

LENGTH OF STAY

| | Fall 2020 | Fall 2021 |
|------------------------|-----------|-----------|
| Average Length of Stay | 5.3 | 5.4 |
| Day tripper | 22% | 17% |
| 1 night | 7% | 3% |
| 2 nights | 10% | 10% |
| 3 nights | 12% | 13% |
| 4 nights | 11% | 16% |
| 5+ nights | 38% | 41% |

ACCOMMODATIONS

| | Fall 2020 | Fall 2021 |
|--|-----------|-----------|
| Hotel/motel/resort | 25% | 32% |
| Staying with friends and relatives | 17% | 15% |
| Rented condo, rental house | 9% | 10% |
| Bed & Breakfast/Inn | 8% | 8% |
| RV park/campground/cabin | 7% | 7% |
| Personal condo, house, timeshare, etc. | 7% | 7% |
| Camping in the wilderness | 2% | 3% |
| Sporting camp or wilderness lodge | 1% | 1% |
| Outdoor Outfitter | 0% | 1% |
| Other | 2% | 0% |
| Did not stay overnight | 22% | 17% |

BOOKING

| | Fall 2020 | Fall 2021 |
|-------------------------------|-----------|-----------|
| Directly with the hotel/condo | 39% | 45% |
| Online travel agency | 21% | 23% |
| Airbnb | 16% | 9% |
| Short term rental service | 9% | 7% |
| Vacation rental company | 2% | 5% |
| Offline travel agent | 3% | 2% |
| Group tour operator | 1% | 2% |
| Travel package provider | 1% | 1% |
| Other | 8% | 7% |

IN-MARKET RESOURCES*

| | Fall 2020 | Fall 2021 |
|--|--------------|--------------|
| Navigation website/apps | 40% | 54% |
| Visitor Information Centers | 15% | 24% |
| Hotel/resort website/app | 4% | 20% |
| Restaurant website/app | 17% | 19% |
| Materials from my hotel, campground | 11% | 16% |
| Trip planning app | 8% | 13% |
| Personal social media | 8% | 12% |
| VisitMaine.com | 4% | 11% |
| Destination social media | 8% | 11% |
| Chambers of Commerce | 1% | 5% |
| Booking website/app | 5% | 4% |
| Airline website/app | 3% | 2% |
| Other | 5% | 7% |
| None | 38% | 20% |

ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|-----------------------------|--------------|--------------|
| Food/beverage/culinary | 76% | 78% |
| Touring/sightseeing | 66% | 67% |
| Shopping | 42% | 48% |
| Active outdoor activities | 65% | 40% |
| Water activities | 32% | 27% |
| History/culture | 13% | 21% |
| Entertainment | 5% | 18% |
| Astrotourism | NA | 5% |
| Business conference/meeting | 3% | 2% |
| Other | 9% | 5% |

FOOD & BEVERAGE ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|--|-----------|-----------|
| Ate lobster | 50% | 52% |
| Going to local brew pubs/craft breweries | 42% | 44% |
| Ate other local seafood | 42% | 37% |
| Consumed other locally produced Maine foods | 21% | 23% |
| Enjoyed high-end cuisine or five-star dining | 11% | 19% |
| Enjoyed unique Maine food or beverages | 20% | 13% |
| Enjoying local food at fairs/festivals | 12% | 11% |
| Ate farm-to-table or organic cuisine | 15% | 7% |
| Visited Farmer's Markets | 8% | 7% |
| Other | 3% | 3% |

TOURING & SIGHTSEEING ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|---|-----------|-----------|
| Enjoying the ocean views/rocky coast | 49% | 55% |
| Sightseeing | 57% | 50% |
| Driving for pleasure | 41% | 45% |
| Viewing fall colors | 30% | 38% |
| Photography | 36% | 31% |
| Wildlife viewing/bird watching | 14% | 30% |
| Enjoying the mountain views | 46% | 29% |
| Nature cruises or tours | 6% | 28% |
| Tours of communities/local architecture | 13% | 17% |
| Other | 3% | 4% |

SHOPPING ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|---|--------------|--------------|
| Shopping for gifts/souvenirs | 17% | 26% |
| Shopping in downtown areas | 13% | 25% |
| Outlet shopping | 25% | 24% |
| Shopping for unique/locally produced goods | 12% | 20% |
| Shopping for “Made in Maine” products | 11% | 19% |
| Shopping for antiques/local arts and crafts | 8% | 16% |
| Shopping at malls | 13% | 9% |
| Other | 3% | 2% |

ACTIVE OUTDOOR ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|------------------------------------|--------------|--------------|
| Hiking/climbing/backpacking | 57% | 32% |
| Exploring State and National Parks | 43% | 22% |
| Bicycling touring | 5% | 7% |
| Camping | 10% | 6% |
| Riding all-terrain vehicles | 5% | 3% |
| Hunting | 7% | 3% |
| Mountain/Fat Biking | 6% | 3% |
| Alpine skiing/snowboarding | 1% | 1% |
| Other | 0% | 2% |

WATER ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|-------------------------|--------------|--------------|
| Going to the beach | 14% | 16% |
| Outdoor swimming | 9% | 12% |
| Fishing | 14% | 11% |
| Canoeing/kayaking | 10% | 9% |
| Motor boating | 9% | 5% |
| Pool swimming | 2% | 3% |
| Sailing | 5% | 3% |
| Water skiing/jet skiing | 2% | 1% |
| White water rafting | 1% | 0% |
| Surfing | 0% | 0% |
| Other | 2% | 1% |

HISTORY/CULTURE ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|--|--------------|--------------|
| Visit historic sites/museums | 10% | 15% |
| Visit art museums/local artisan studios | 9% | 11% |
| Painting/drawing/sketching | 10% | 4% |
| Get to know the local people and/or culture | 0% | 4% |
| Attend plays/musicals/theatrical events | 1% | 2% |
| Attend popular music concerts/events | 1% | 2% |
| Attend operas/classical music events | 1% | 2% |
| Participate in nightlife/other evening entertainment | 5% | 1% |
| Other | 0% | 2% |

ENTERTAINMENT ACTIVITIES*

| | Fall 2020 | Fall 2021 |
|------------------------|--------------|--------------|
| Children's museums | 1% | 3% |
| Outdoor fun centers | 2% | 3% |
| Water parks | 0% | 3% |
| Bars/nightlife | 3% | 3% |
| Amusement/theme parks | 1% | 2% |
| Animal parks/zoos | 2% | 2% |
| Summer camps | 1% | 2% |
| Agricultural fairs | 0% | 2% |
| Horseback riding | 1% | 2% |
| Attend sporting events | 1% | 2% |
| Other | 2% | 2% |

OTHER STATES/PROVINCES VISITED*

| | Fall 2020 | Fall 2021 |
|---------------------------|--------------|--------------|
| No other states/provinces | 81% | 67% |
| Massachusetts | 7% | 17% |
| New Hampshire | 11% | 16% |
| New York | 2% | 7% |
| Vermont | 3% | 7% |
| Connecticut | 2% | 4% |
| Rhode Island | 2% | 4% |
| Ontario | 0% | 1% |
| Other | 1% | 1% |

TRAVELING IN MAINE*

| | Fall 2020 | Fall 2021 |
|------------------------------|--------------|--------------|
| No other regions | 34% | 46% |
| Midcoast & Islands | 16% | 35% |
| The Maine Beaches | 19% | 34% |
| Downeast & Acadia | 25% | 29% |
| Greater Portland & Casco Bay | 34% | 27% |
| The Maine Highlands | 12% | 15% |
| Maine Lakes & Mountains | 8% | 12% |
| Kennebec Valley | 7% | 6% |
| Aroostook County | 6% | 4% |
| Other | 1% | 1% |

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

| | Fall 2020 | Fall 2021 |
|---------------------------|-----------|-----------|
| Would recommend Maine | 99% | 98% |
| Would not recommend Maine | 0% | 0% |
| Not sure | 1% | 2% |

| | Fall 2020 | Fall 2021 |
|---------------------------------|-----------|-----------|
| Definitely recommend region | 84% | 77% |
| Probably would recommend region | 12% | 17% |
| Would not recommend region | 1% | 1% |
| Not sure | 3% | 5% |

RETURNING TO MAINE

| | Fall 2020 | Fall 2021 |
|------------------------|-----------|-----------|
| Definitely will return | 78% | 69% |
| Probably will return | 18% | 19% |
| Will not return | 2% | 1% |
| Not sure | 2% | 11% |

MAINE OFFICE OF TOURISM

Fall Visitor Tracking Report
September – November 2021

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