

KENNEBEC VALLEY

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022



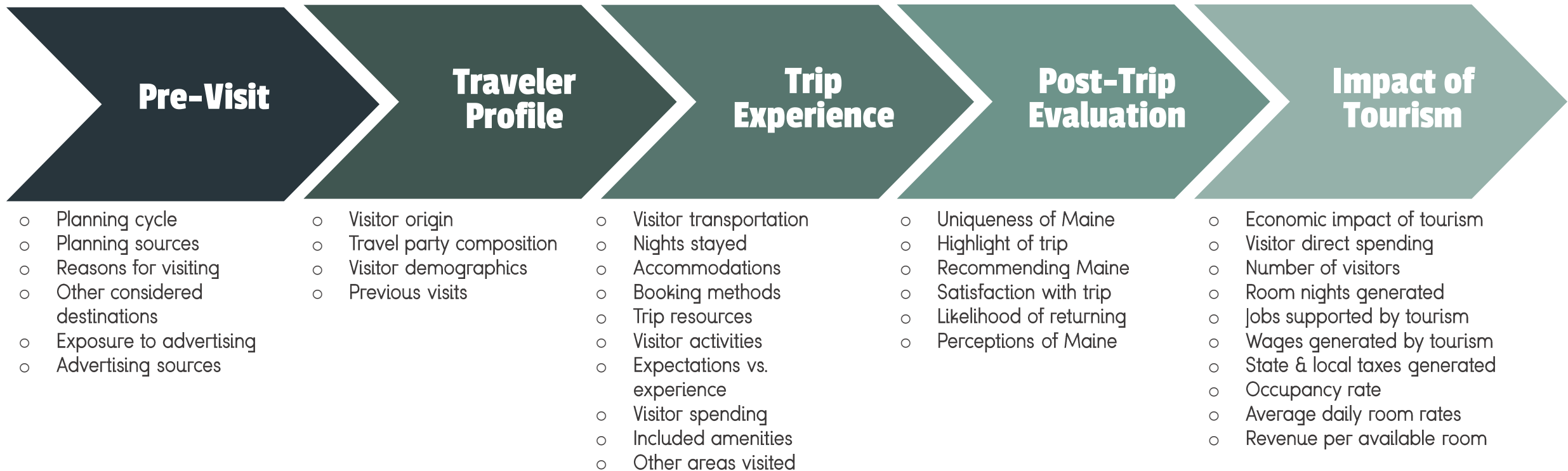
INTRODUCTION



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Kennebec Valley from December 2021 to November 2022.

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 Kennebec Valley.



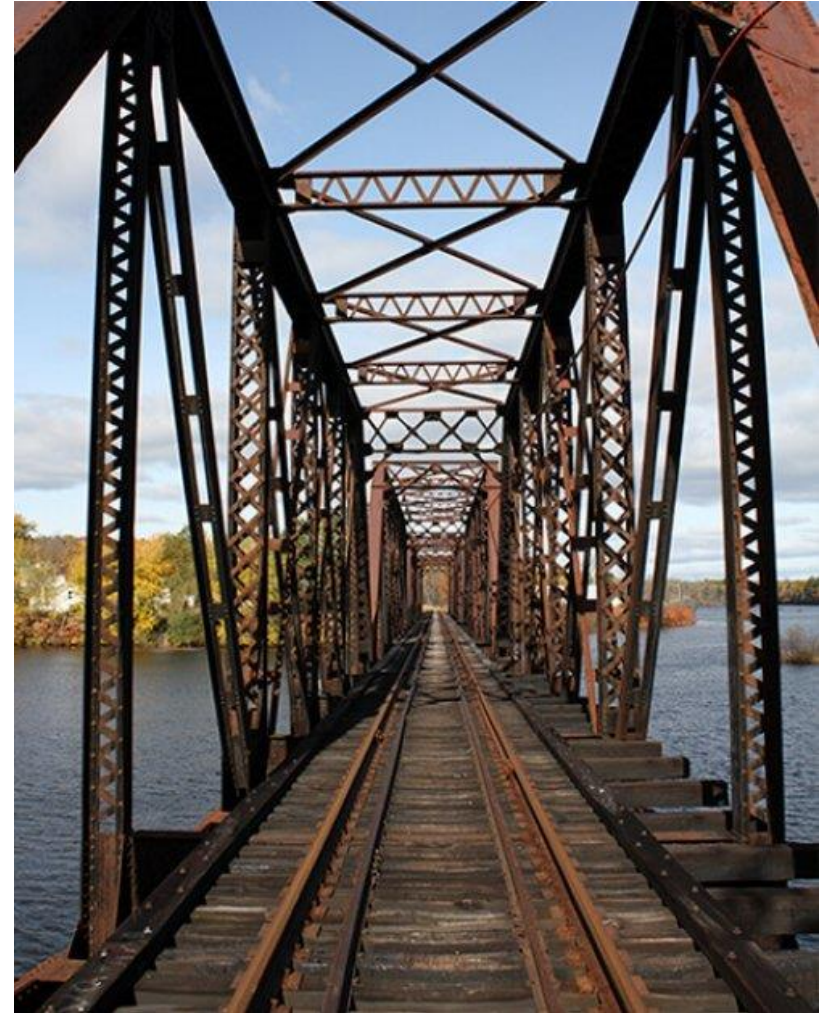
EXECUTIVE SUMMARY



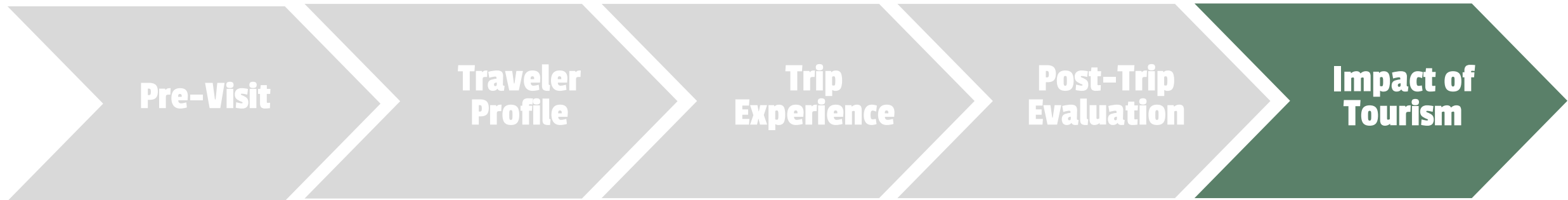
KENNEBEC VALLEY

Compared to visitors to other regions, visitors to Kennebec Valley region are more likely to:

- » Be an in-state visitor
- » Believe the value for the money used for the trip exceeded expectations



TRIP PLANNING CYCLE : IMPACT OF TOURISM

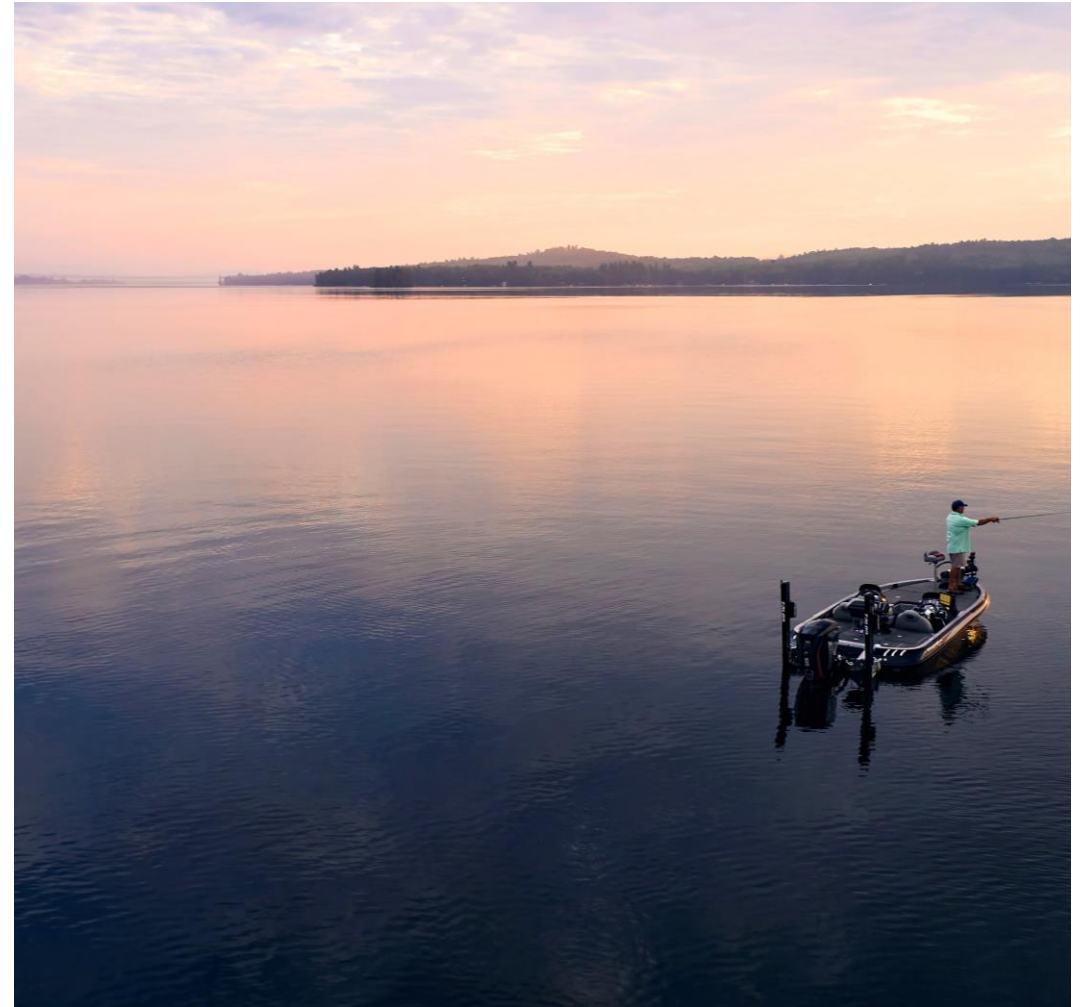


ECONOMIC IMPACT

Visitor spending generated

\$888,655,700

in economic impact to Kennebec Valley's
economy, up **+3.4%** from 2021



DIRECT SPENDING

Visitors to Kennebec Valley spent

\$568,830,400

throughout the county in 2022 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **+4.2%** from 2021



VISITORS

Kennebec Valley attracted

830,300

visitors in 2022, up **0.5%** from 2021



VISITORS DAYS*

All visitors to Kennebec Valley spent

4,099,600

Days in Kennebec Valley throughout 2022



*Visitor days is the total number of days spent by visitors in the state of Maine. This includes overnight visitors and day trippers.

ROOM NIGHTS

Visitors to Kennebec Valley generated

585,800

nights in Kennebec Valley accommodations
throughout 2022, up **11.9%** from 2021



JOBS SUPPORTED

Visitors to Kennebec Valley supported the creation of

8,790

jobs throughout the county in 2022, down
-9.4% from 2021



WAGES GENERATED

Visitors to Kennebec Valley supported

\$285,912,700

in wages paid to Kennebec Valley employees in
2022, down **-3.3%** from 2021



VISITORS & JOBS

Every

94

visitors supports a new job in Kennebec Valley



HOUSEHOLD SAVINGS

Visitors to Kennebec Valley saved local households

\$966

in state and local taxes in 2022



LODGING METRICS

Occupancy Rate

54.5%

+ 10.5% from 2021

Average Daily Rate

\$154.73

+ 16.4% from 2021

Revenue per Available Room

\$84.33

+ 28.7% from 2021

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » **67%** of visitors started planning their trip a month or more in advance of their trip
- » **2 in 3** visitors have a booking window of less than 3 months

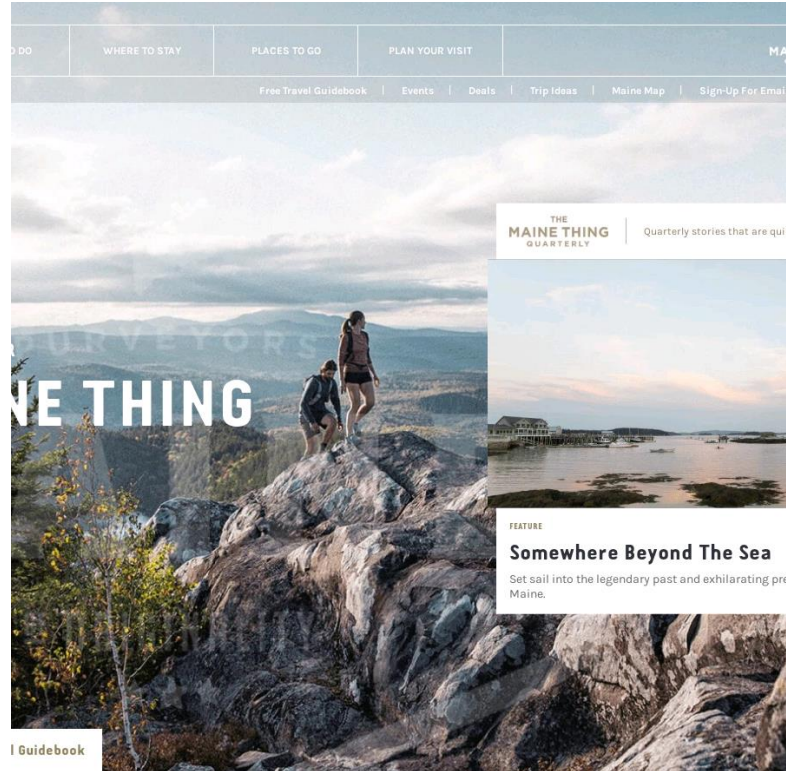


TOP ONLINE TRIP PLANNING SOURCES*

67% visitors used one or more online resources to help them plan their trip in Kennebec Valley



25% Online search engines



17% VisitMaine.com



12% Traveler reviews/blogs/stories

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



40% Advice from friends/family



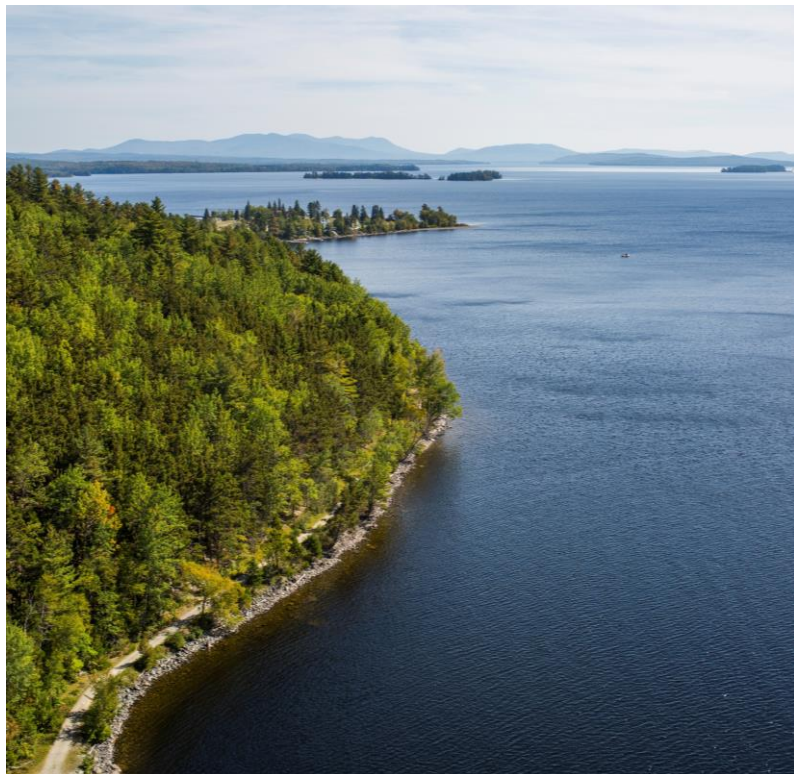
16% Articles or travelogues



12% AAA

*Multiple responses permitted.

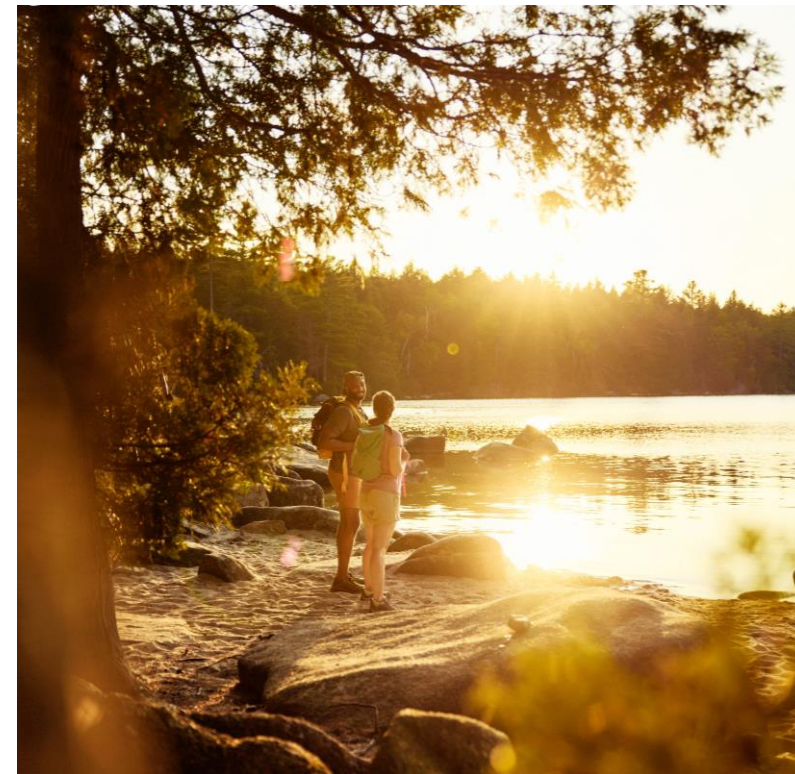
TOP REASONS FOR VISITING*



29% Sightseeing/touring



28% Visiting friends/family



27% Relax and unwind

*Multiple responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » **62%** (-4% points from 2021) of visitors did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip
- » As other destinations and international borders opened up for visitation, potential visitors now have many more destination options to choose from



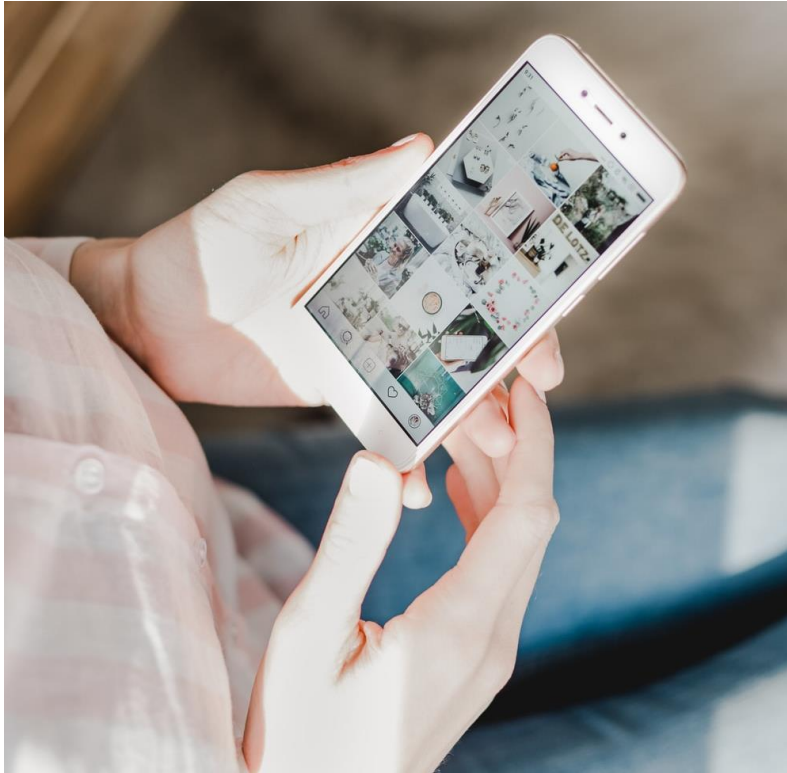
PRE-TRIP EXPOSURE TO ADVERTISING

- » **48%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to Kennebec Valley (+**9%** points from 2021)
- » This information influenced **25%** of all Kennebec Valley visitors to visit Maine



TOP SOURCES OF ADVERTISING EXPOSURE*

Base: 48% who noticed advertising



45% Social media



43% Internet

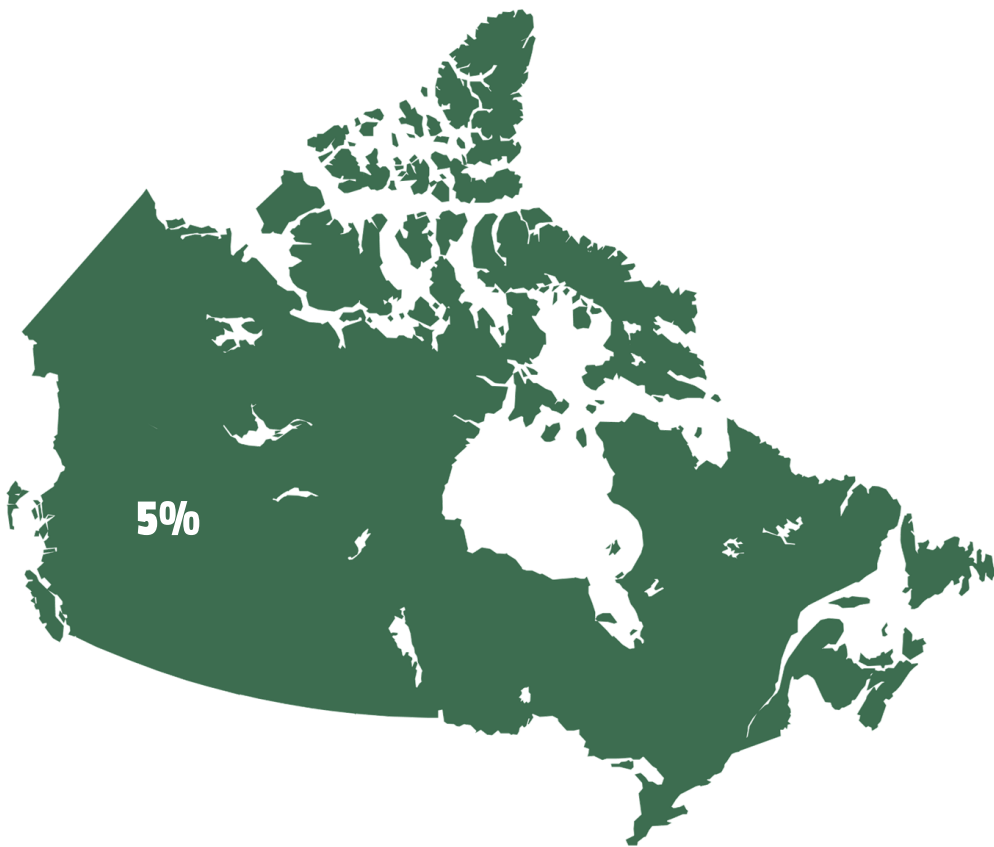
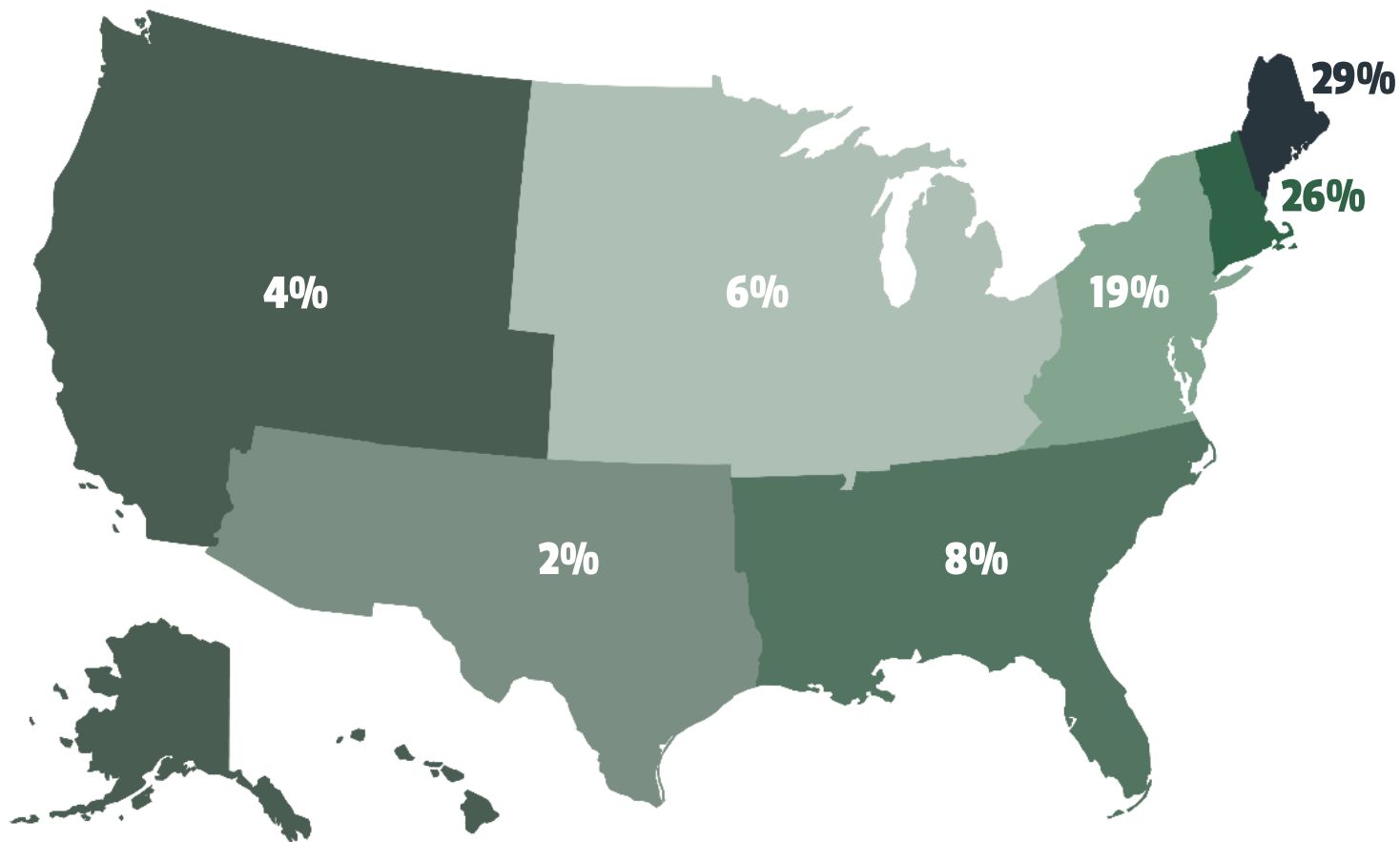
*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN

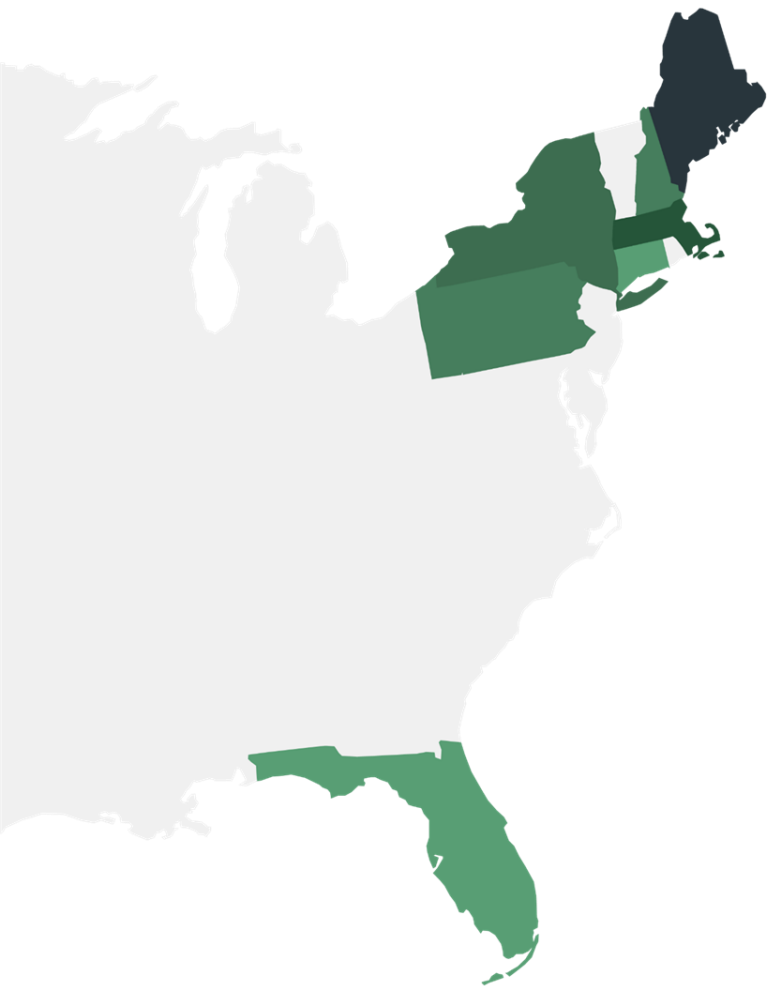
International travel is rebounding as international visitation increased **+4% points** from 2021



1% of visitors came from outside of the United States and Canada.

5% of visitors came Canada.

TOP ORIGIN STATES & PROVINCES



67%

of visitors traveled from **7** U.S. states, including from other regions of Maine.

- 29** % Maine
- 13** % Massachusetts
- 7** % New York
- 5** % New Hampshire
- 5** % Pennsylvania
- 4** % Connecticut
- 4** % Florida

TOP ORIGIN MARKETS



7% New York City¹



7% Boston



5% Waterville, ME

¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

TRAVEL PARTIES

The typical Kennebec Valley visitor traveled with **2.9** people in their visitor party



16% visitors traveled with at least one person under the age of 18 in their travel party



DEMOGRAPHIC PROFILE

» The typical Kennebec Valley visitor:

- » Is **46** years old¹
- » Female² - **51%**
- » Is white - **90%**



¹Median age.

²Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Kennebec Valley visitor:
 - » Is a college graduate - **73%**
 - » Is married/in a domestic partnership - **69%**
 - » Is employed full-time - **52%**
 - » Has an annual household income¹ of **\$84,500**



¹Median household income.

NEW & RETURNING VISITORS

- » **18%** of visitors to Kennebec Valley were traveling in Maine for the first time
- » **32%** of visitors to Kennebec Valley had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **83%** of visitors drove to their Kennebec Valley destination
- » **5%** of visitors to Kennebec Valley flew to Maine through Portland International Jetport



NIGHTS STAYED

- » **77%** of visitors spent one or more nights in Kennebec Valley
- » Typical visitors stayed **5.0*** nights in Kennebec Valley on their trip



* Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

TOP ACCOMMODATIONS



23% Did not stay overnight



22% Friends/family home



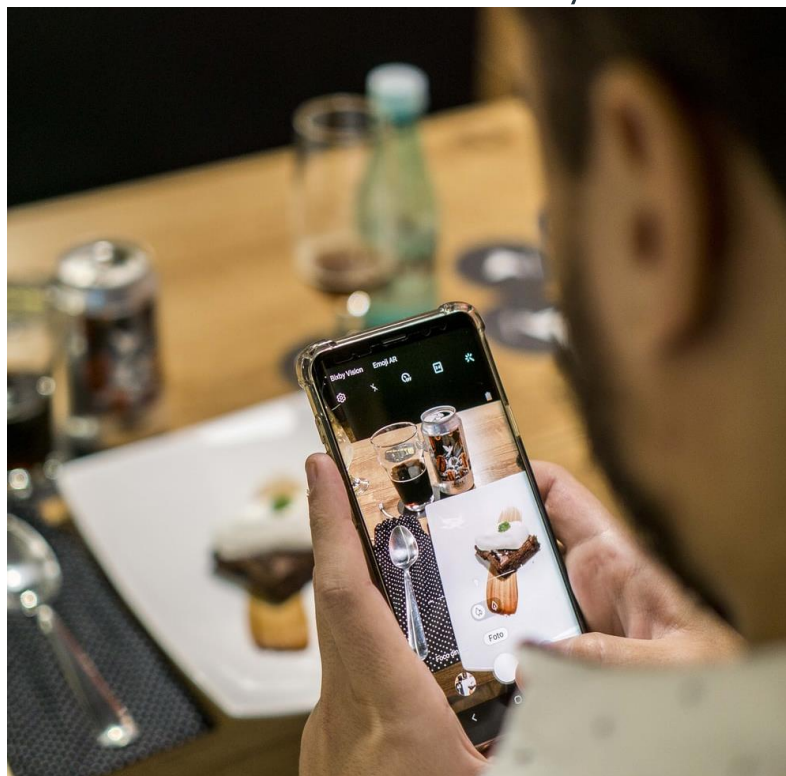
16% Hotel/motel/resort

TOP IN-MARKET VISITOR RESOURCES*

Over **7 in 10** visitors used one or more in-market resources to help them plan places to go while in Kennebec Valley



42% Navigation websites/apps



24% Restaurant website/app



21% Personal social media

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



64% Food/beverage/ culinary



51% Touring/sightseeing



46% Active outdoor activities

*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in Kennebec Valley spent **\$654** per day and **\$4,128** during their trip
- » Visitors who stayed overnight in unpaid accommodations in Kennebec Valley spent **\$324** per day and **\$2,514** during their trip
- » Visitors who did not stay overnight in Kennebec Valley spent **\$252** during their trip



VISITING OTHER STATES & PROVINCES

- » Over **3 in 5** visitors to Kennebec Valley did not visit any other U.S. state or Canadian province
- » Kennebec Valley visitors were **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE

» Nearly **4 in 5** visitors to Kennebec Valley traveled to other regions during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **97%** of visitors to Kennebec Valley would recommend Maine to a friend or relative as a vacation destination
- » **96%** of visitors to Kennebec Valley would recommend that their friends and family visit the region
 - » **74%** would definitely recommend Kennebec Valley



LIKELIHOOD OF RETURNING TO MAINE

- » **93%** of visitors to Kennebec Valley will return to Maine for a future visit or vacation
- » **76%** of visitors will “definitely return” to Maine in the future



SATISFACTION

- » **98%** of visitors were satisfied with their trip to Kennebec Valley
- » However, increased cost and the current lack of work force negatively affected visitors' trip experiences: **11%** of visitors said that the value for their money did not meet their expectations and **10%** said the customer service did not meet their expectations



OVERCROWDING

- » **52%** of visitors thought the number of visitors during their trip to Kennebec Valley was fine
- » **22%** of visitors thought it was a little overcrowded



DETAILED FINDINGS



TRIP PLANNING CYCLE : PRE-VISIT



KEY PERFORMANCE INDICATORS

Economic Impact	2021	2022	Δ% from '21
Number of Visitors	826,200	830,300	+ 0.5%
Room nights generated	523,700	585,800	+ 11.9%
Direct expenditures	\$546,020,200	\$568,830,400	+ 4.2%
Total economic impact	\$859,395,100	\$888,655,700	+ 3.4%

EMPLOYMENT IMPACTS

Kennebec Valley Jobs	2021	2022	Δ% from '21
Jobs generated (direct)	7,400	6,800	- 8.1%
Total employment impact	9,700	8,790	- 9.4%

Kennebec Valley Wages	2021	2022	Δ% from '21
Wages paid (direct)	\$201,072,000	\$195,695,400	- 2.7%
Total impact on wages	\$295,583,900	\$285,912,700	- 3.3%

RETURN ON INVESTMENT

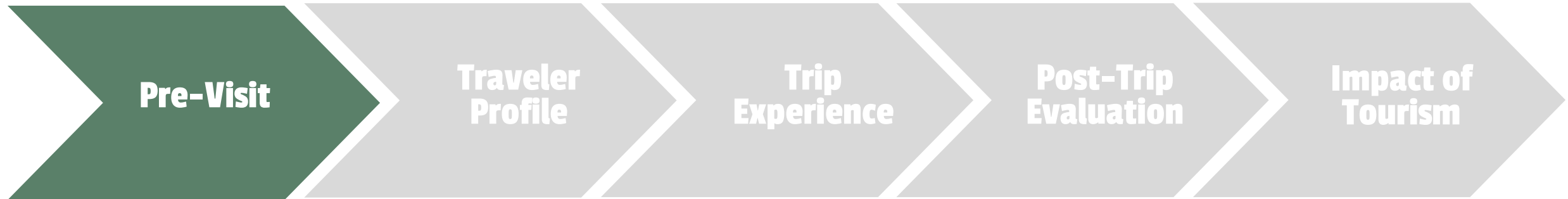
Return on Investment	2021	2022
Visitors per job supported	85	94
State & local taxes supported	\$76,611,700	\$71,821,900
Tax savings per household	\$1,043	\$966

LODGING METRICS

Lodging Metrics	2021*	2022	Δ% from '21
Occupancy Rate (%)	49.3%	54.5%	+ 10.5%
Average Daily Rate	\$132.95	\$154.73	+ 16.4%
RevPAR	\$65.54	\$84.33	+ 28.7%
Total Lodging Revenue	\$76,784,300	\$92,819,300	+20.9%

*Calculation method was updated in 2022.
2021 metrics have been updated to reflect this change.

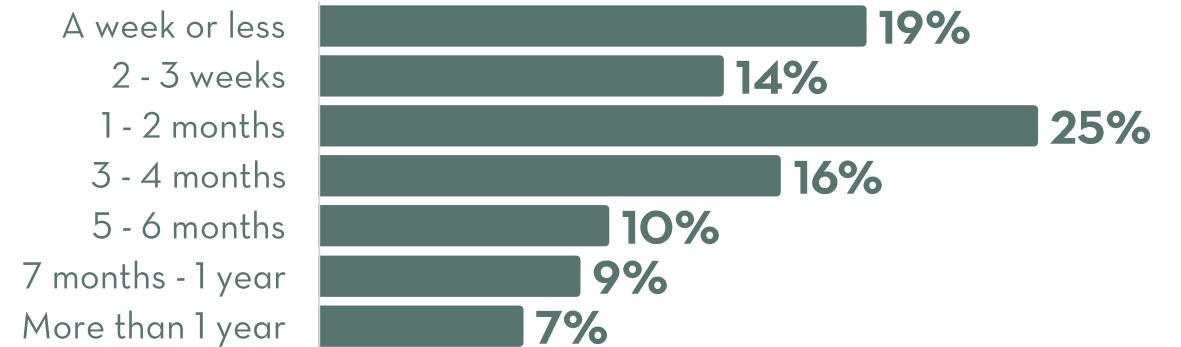
TRIP PLANNING CYCLE : PRE-VISIT



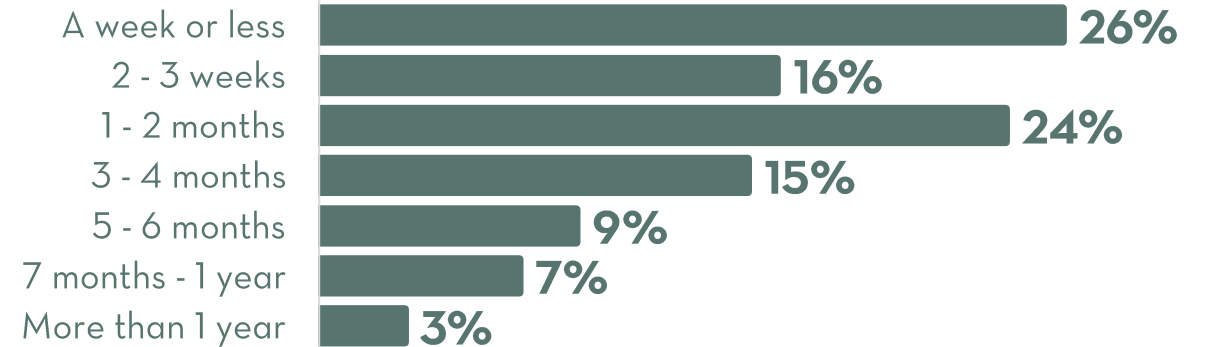
TRIP PLANNING CYCLE

- » Typical visitors to Kennebec Valley began planning their trip **50 days** in advance (+14 days from 2021)
- » **67%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **40 days** in advance (+21 days from 2021)
- » **2 in 3** visitors have a booking window of less than 3 months

Beginning of Trip Cycle

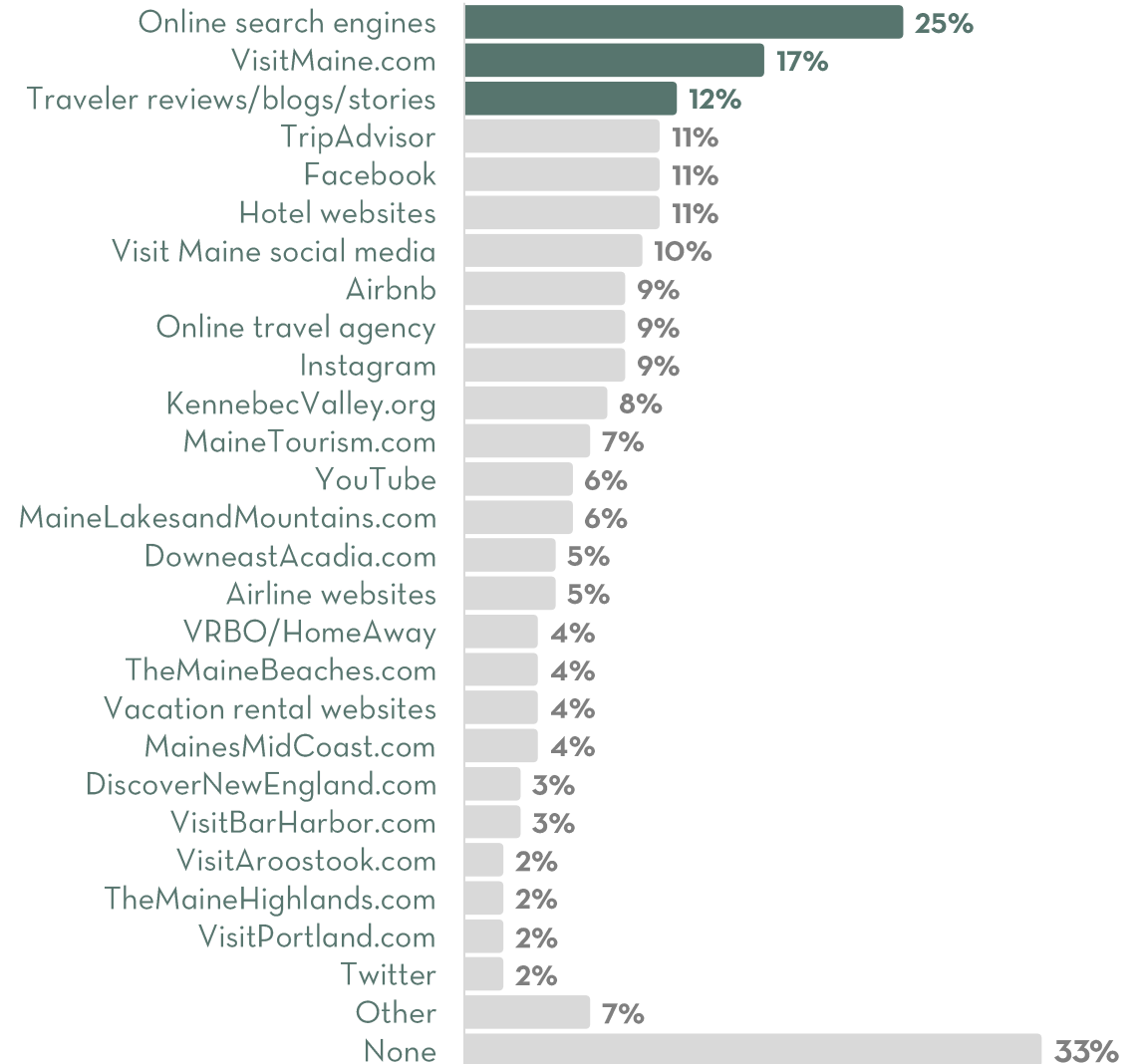


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

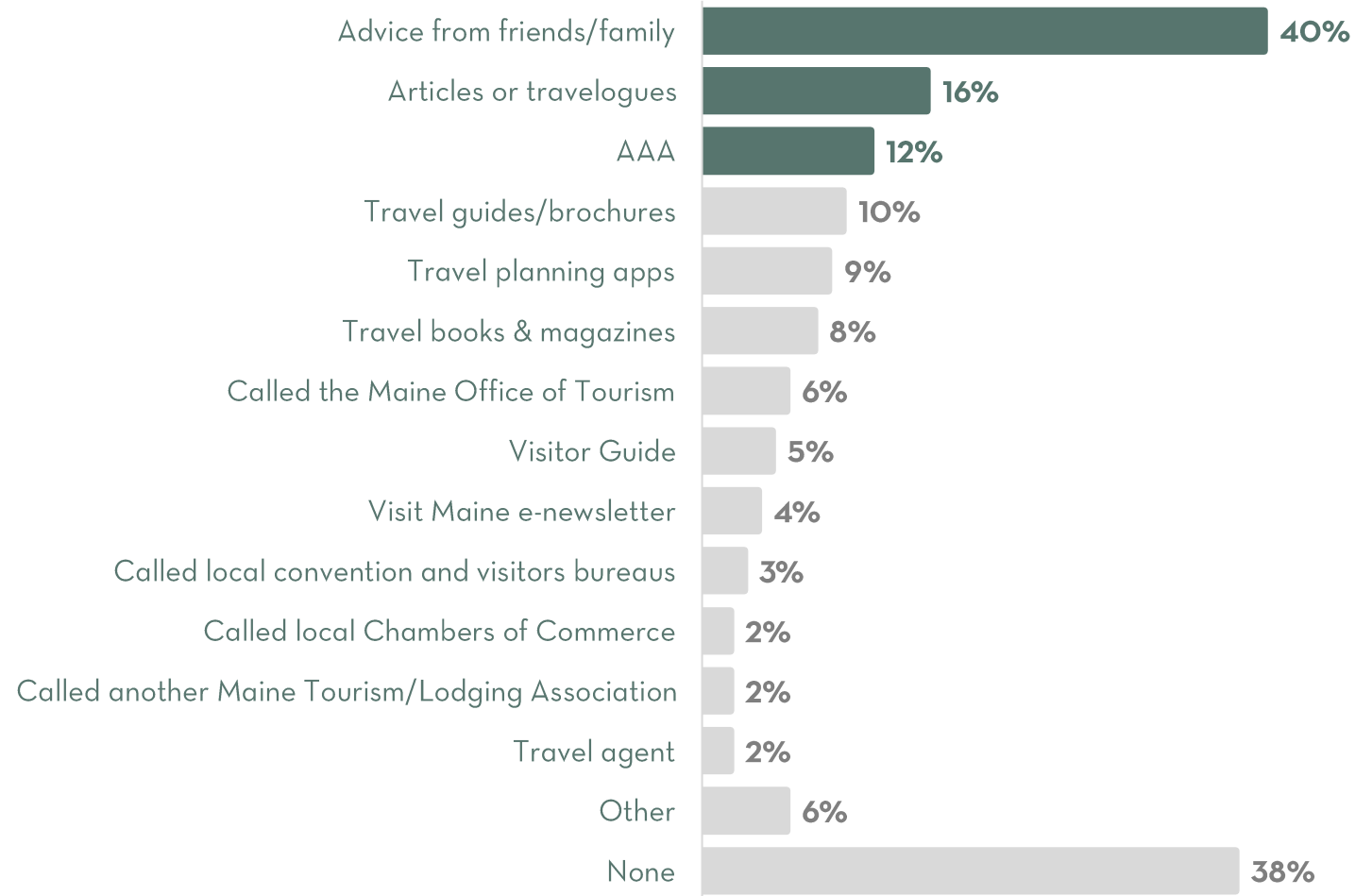
- » **2 in 3** visitors used one or more online resources to help them plan their trip to Kennebec Valley
- » **1 in 4** visitors used an online search engine, such as Google, to help them plan their trip to Kennebec Valley
- » About **17%** of visitors used VisitMaine.com (+6 points from 2021)



*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

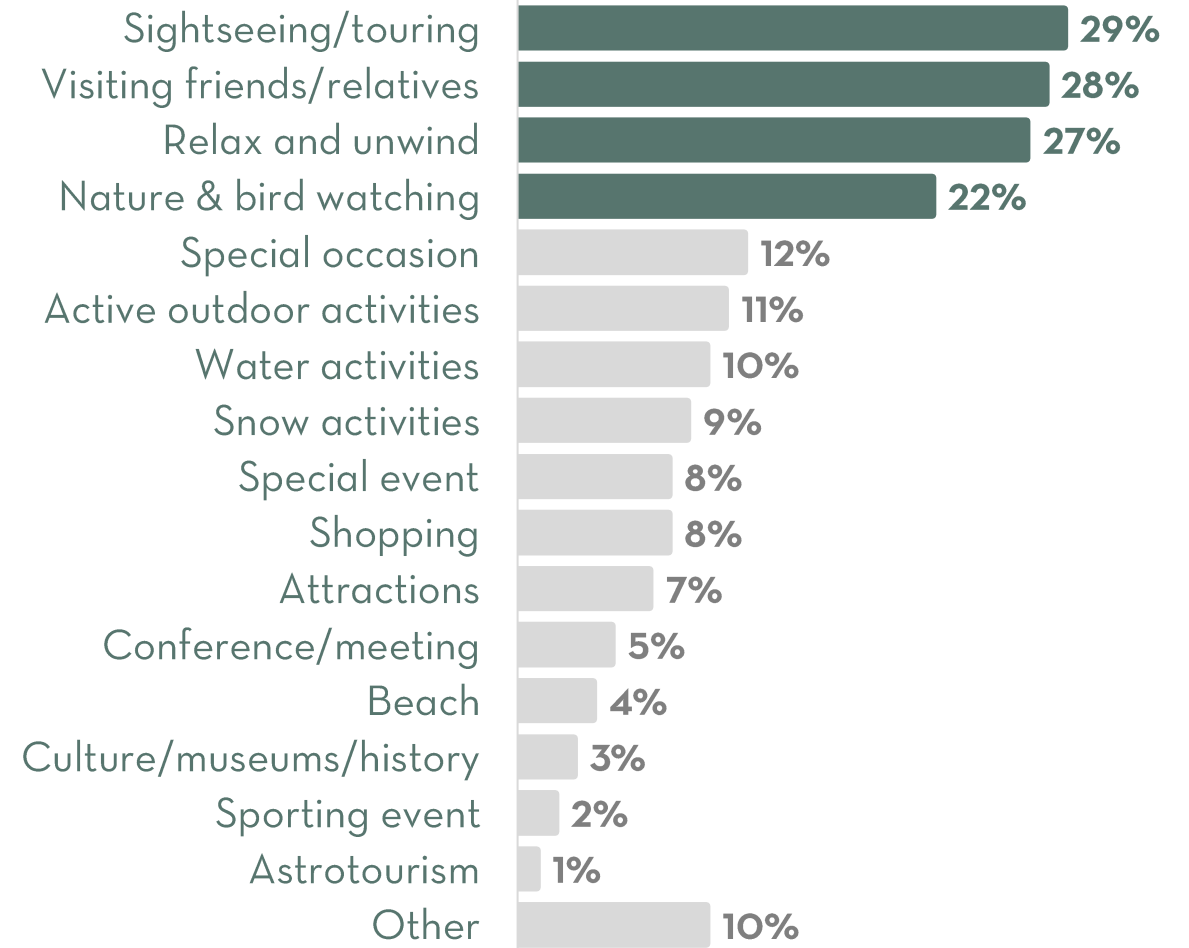
- » **2 in 5** visitors relied on advice from their friends and family to help them plan their trip to Kennebec Valley
- » **16%** of visitors used articles or travelogues (+9% points from 2021), and **12%** used AAA (+6% points from 2021) to help plan their trip to Kennebec Valley
- » Nearly **2 in 5** visitors did not use any other resources to help them plan their trip to Kennebec Valley



*Multiple responses permitted.

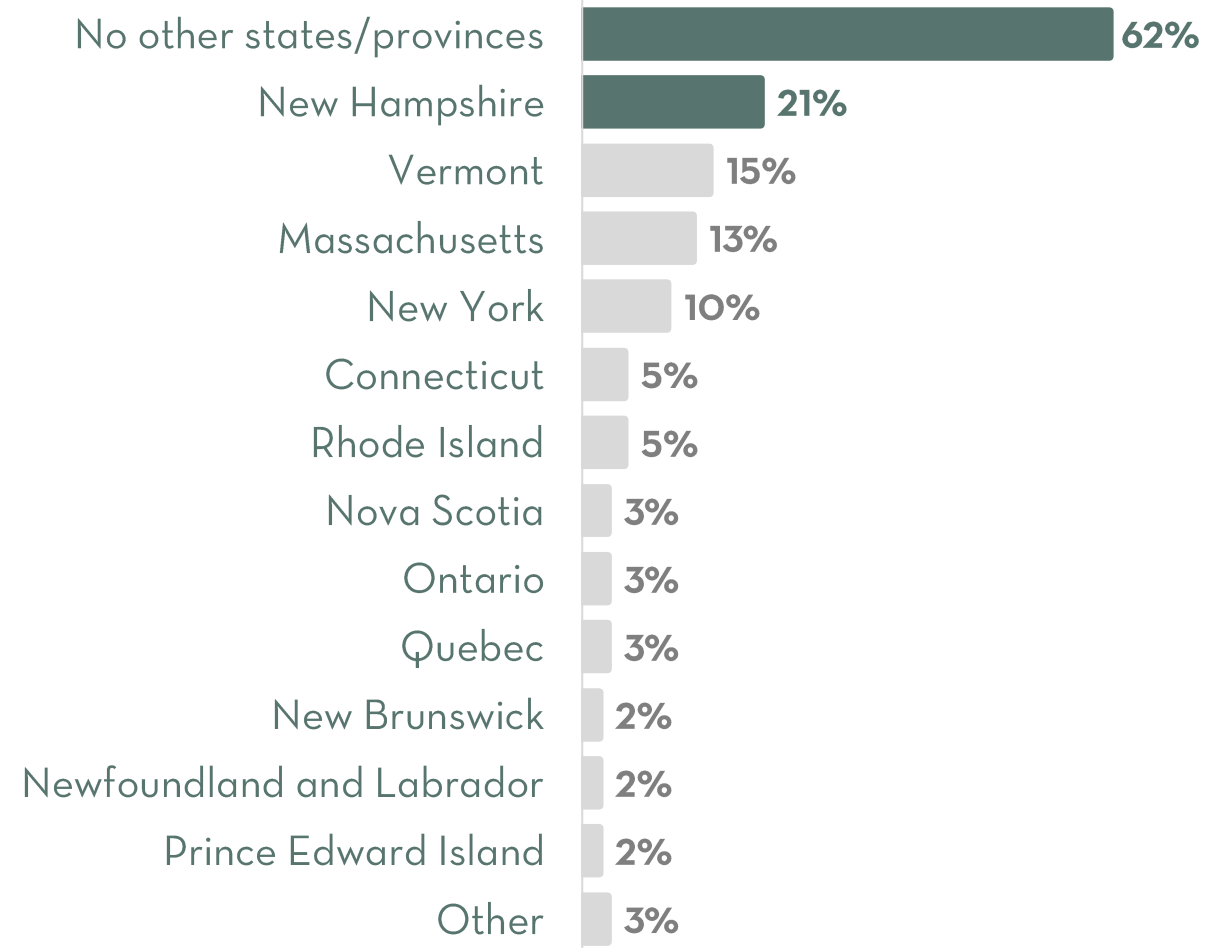
REASONS FOR VISITING*

- » Nearly **3 in 10** visitors traveled to Kennebec Valley to go sightseeing/touring or to visit friends/relatives
- » Over **1 in 4** visitors came to Kennebec Valley to relax and unwind
- » Over **1 in 5** visitors traveled to Kennebec Valley for nature and bird watching



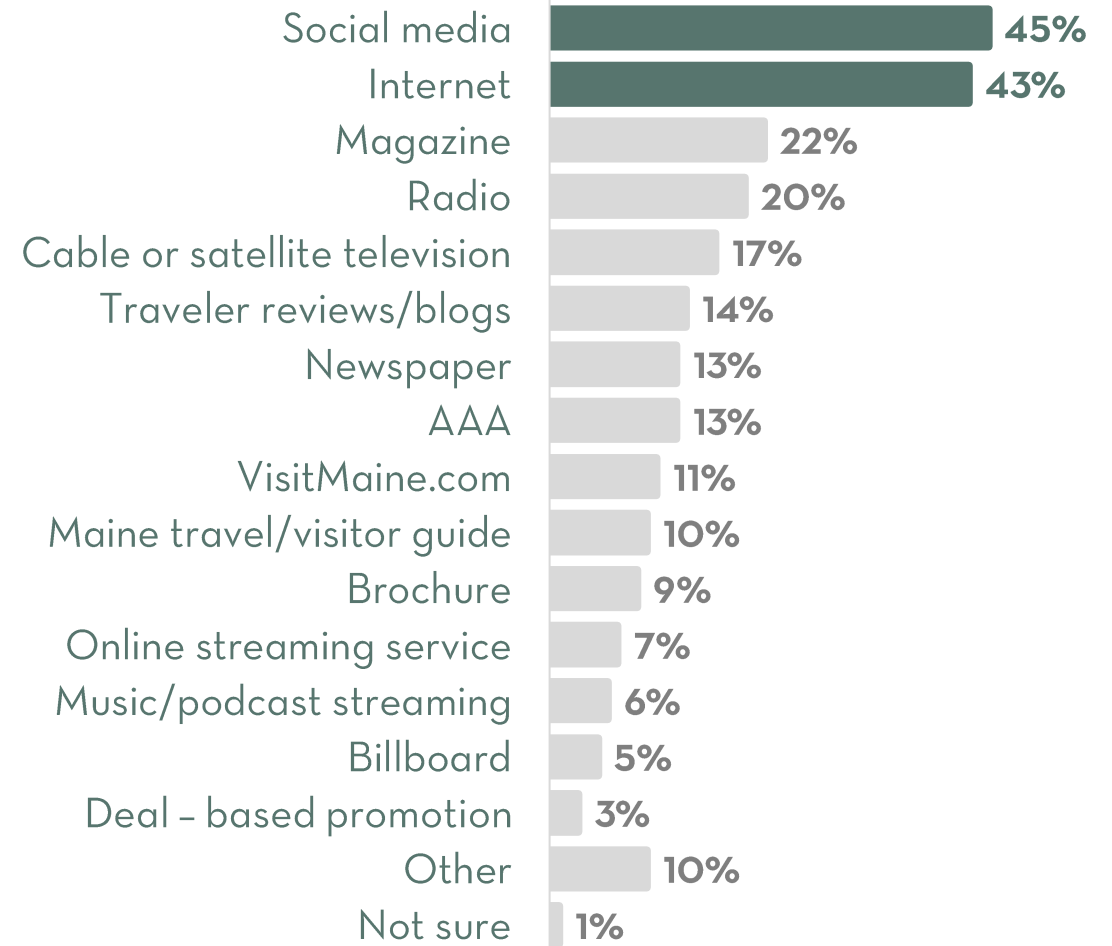
OTHER STATES & PROVINCES CONSIDERED*

- » **62%** (-4% points from 2021) of visitors considered visiting **only** Maine while planning their trips to Kennebec Valley
- » Visitors to Kennebec Valley were **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

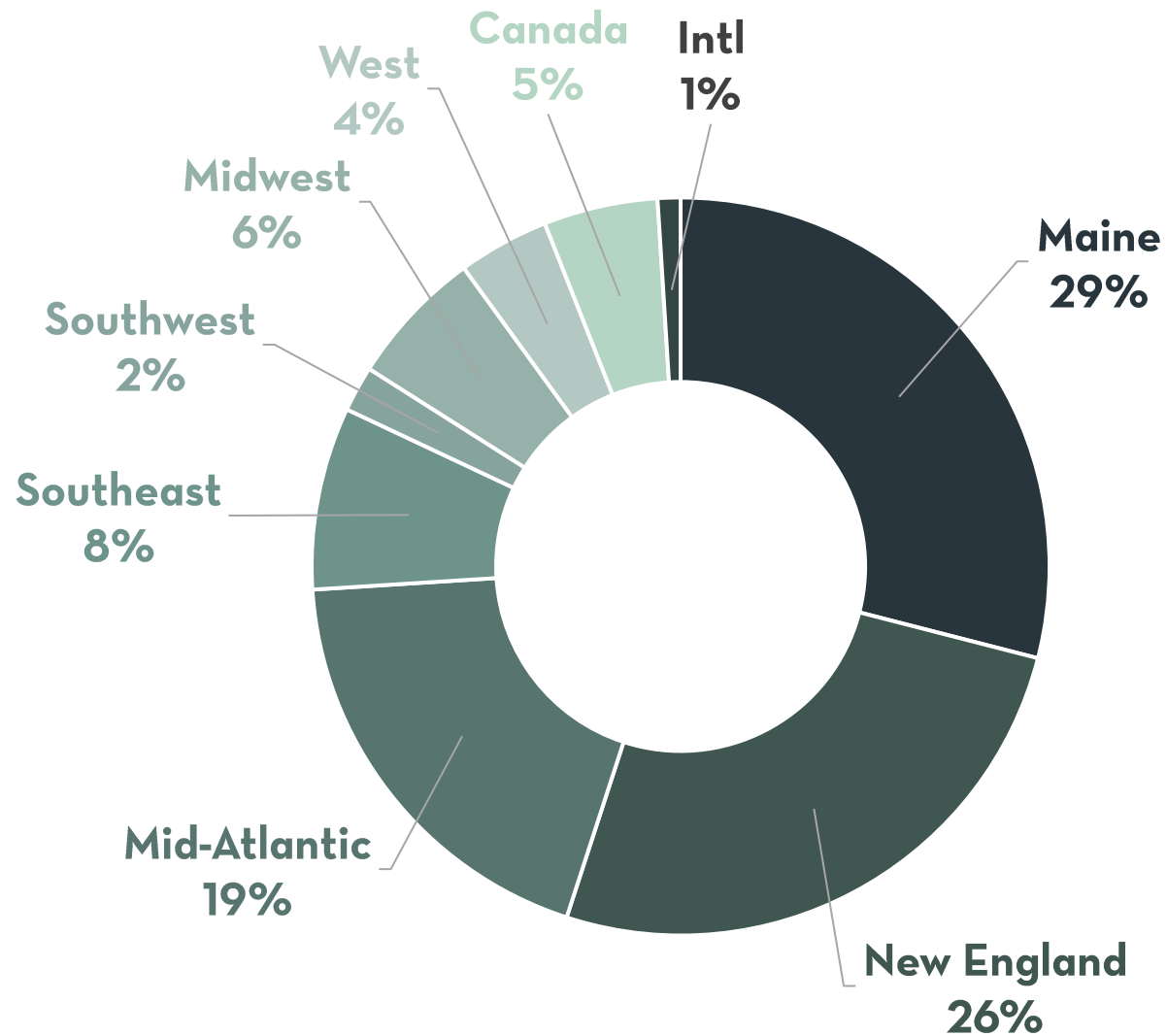
- » **48%** (+9% points from 2021) of visitors noticed advertising or promotions for Maine prior to their trip to Kennebec Valley
- » Visitors who recalled this advertising primarily saw it on **social media** (+8% points from 2021) or the **internet**
- » This information influenced **25%** of all Kennebec Valley visitors to visit Maine



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **82%** of visitors to Kennebec Valley were from 12 U.S. states, Ontario, and Quebec
- » Over **29%** visitors were residents of Maine traveling throughout the state

State	Percent
Maine	29%
Massachusetts	13%
New York	7%
New Hampshire	5%
Pennsylvania	5%
Connecticut	4%
Florida	4%
New Jersey	3%
California	2%
Maryland	2%
Ohio	2%
Rhode Island	2%
Ontario	2%
Quebec	2%

TOP ORIGIN MARKETS

- » **35%** of visitors to Kennebec Valley traveled from **9** U.S. markets
- » **7%** of visitors traveled to Kennebec Valley from either New York City and Boston

Market	Percent
New York City ¹	7%
Boston, MA	7%
Waterville, ME	5%
Washington DC - Baltimore ²	3%
Philadelphia, PA	3%
Augusta, ME	3%
Portland, ME	3%
Providence, RI	2%
Palmyra, ME	2%

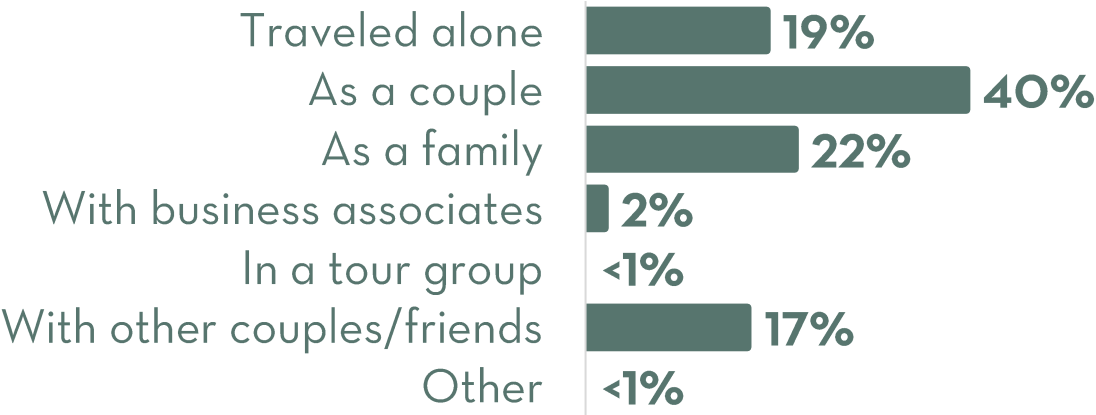
¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

² Includes some markets in Maryland, Virginia, and West Virginia.

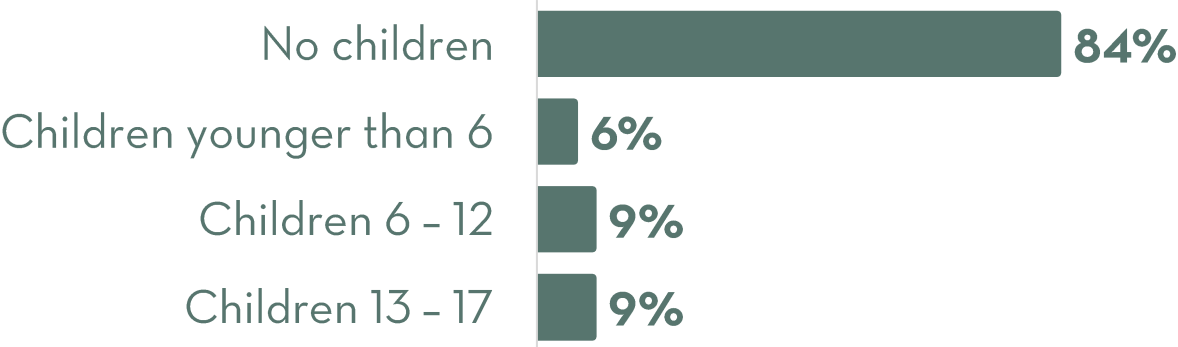
TRAVEL PARTIES

- » Typical visitors traveled to Kennebec Valley in parties of **2.9** people
- » **2 in 5** visitors traveled as a couple
- » **16%** of visitors traveled with one or more children in their travel party

Travel Party Composition



Children in Travel Party*



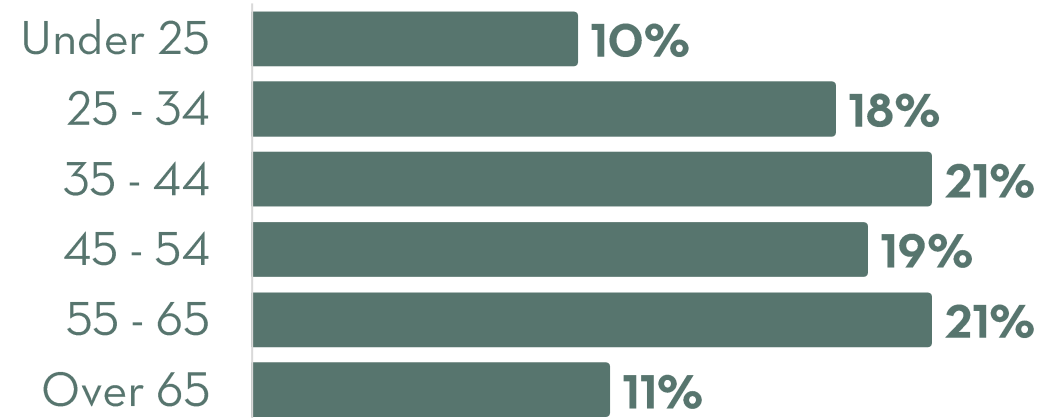
*Multiple responses permitted.

» **51%** visitors to Kennebec Valley interviewed were females



*Of visitors interviewed.

» The average age of visitors to Kennebec Valley is **46** years old



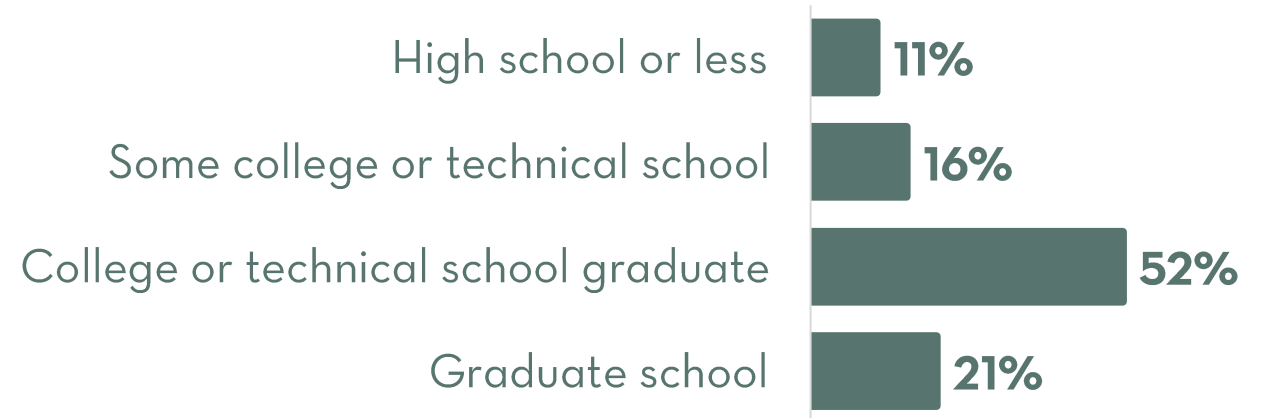
RACE & ETHNICITY

» **9 in 10** visitors to Kennebec Valley were white



EDUCATIONAL ATTAINMENT

» Over **7 in 10** visitors to Kennebec Valley have a college/technical school degree or higher



MARITAL STATUS

» Nearly **7 in 10** visitors to Kennebec Valley were married or living with their partner



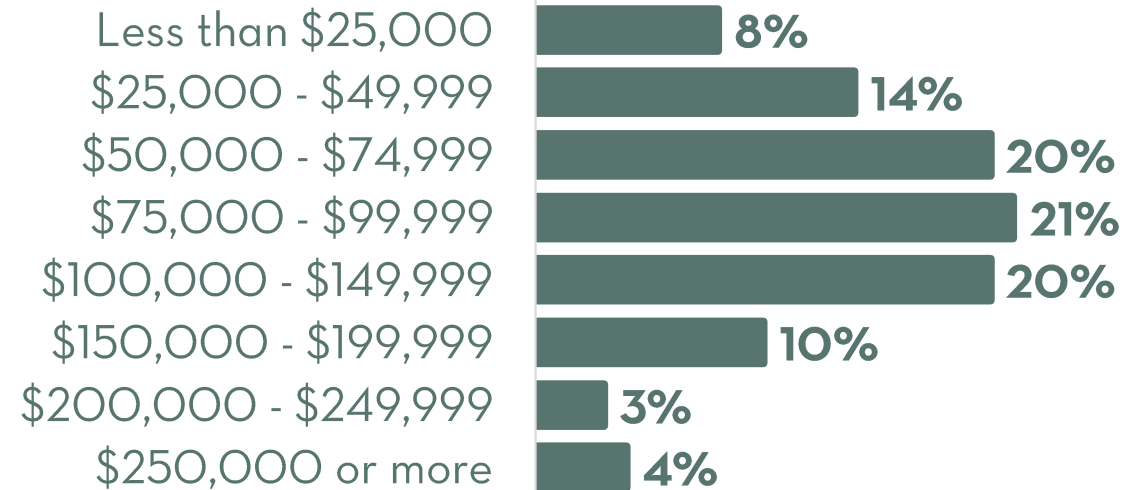
EMPLOYMENT STATUS

» **7 in 10** visitors to Kennebec Valley were employed, most full-time



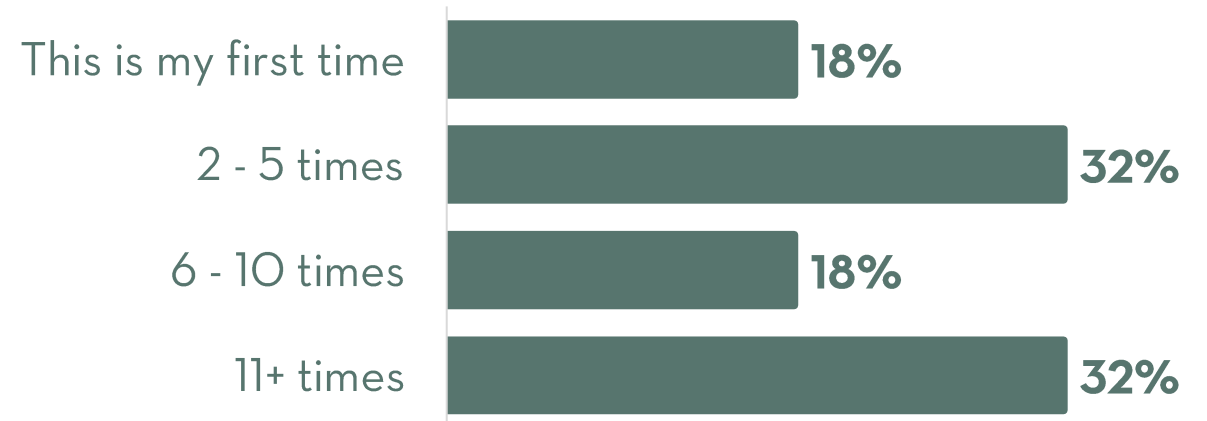
HOUSEHOLD INCOME

- » The average household income of visitors to Kennebec Valley is **\$84,500** per year
- » **17%** of visitors to Kennebec Valley earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » **18%** of visitors to Kennebec Valley were traveling in Maine for the first time
- » **32%** of visitors to Kennebec Valley had previously traveled in Maine more than 10 times

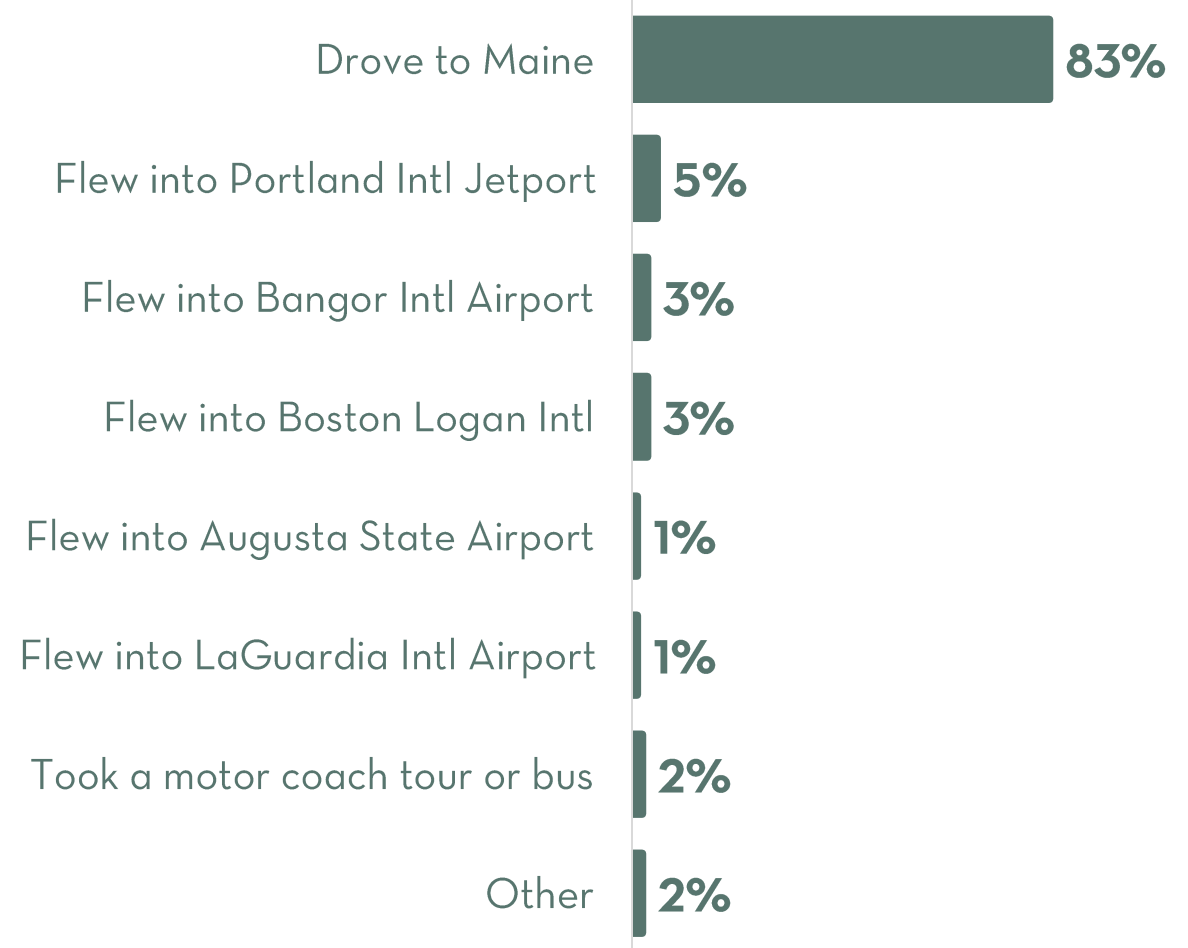


TRIP PLANNING CYCLE : TRIP EXPERIENCE



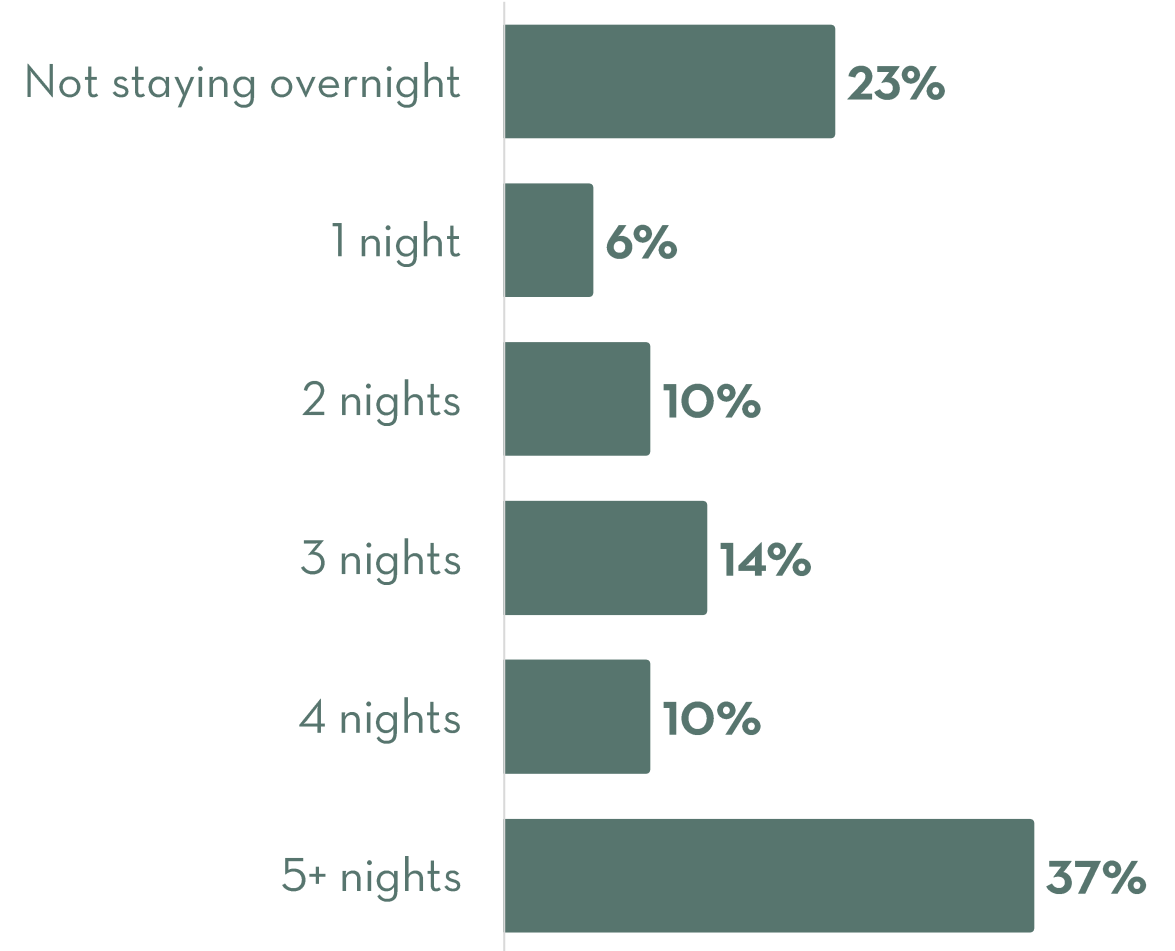
MODES OF TRANSPORTATION

- » Kennebec Valley is a drive-market for most visitors, with **83%** choosing to travel by car over plane, motor coach/bus, or train
- » Most Kennebec Valley visitors who flew to Maine arrived at Portland International Jetport



NIGHTS STAYED

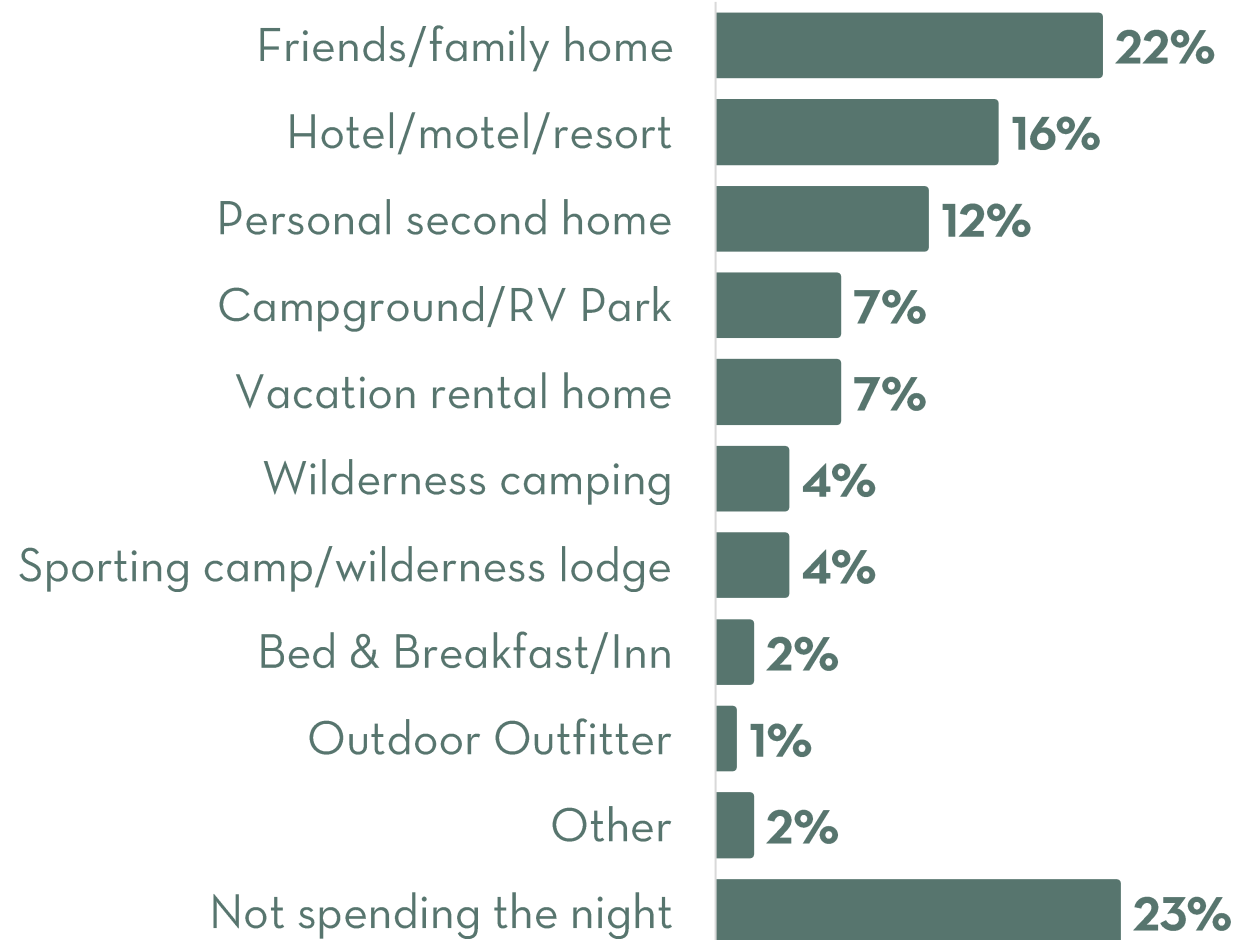
- » **77%** of visitors to Kennebec Valley stayed one or more nights in Maine on their trip
- » Typical visitors stayed **5.0*** nights in Kennebec Valley on their trips
- » Typical visitors to Kennebec Valley staying overnight in paid accommodations stayed **5.2** nights in Maine on their trips



* Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

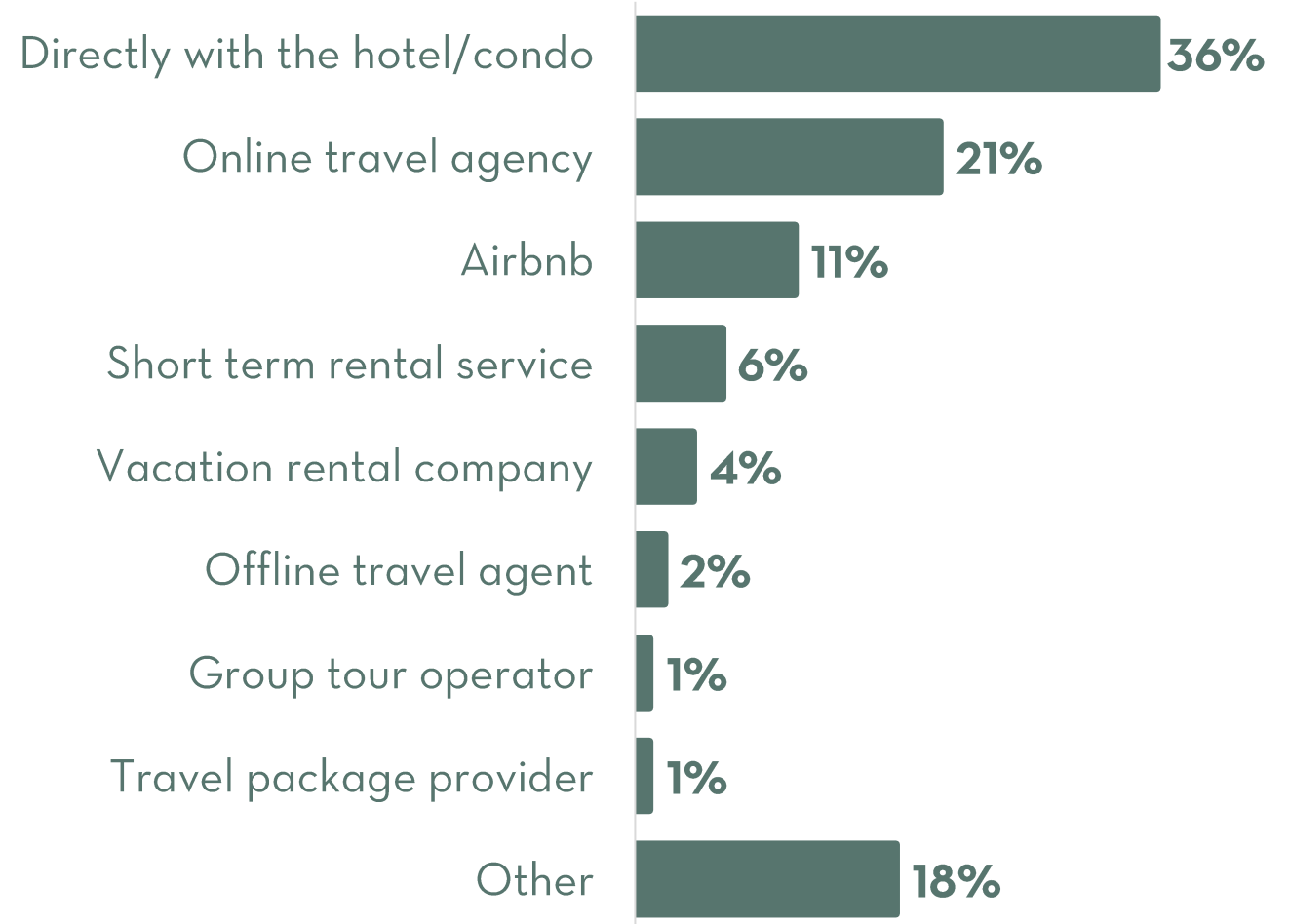
ACCOMMODATIONS

- » Over **1 in 5** visitors to Kennebec Valley stayed overnight at a friend or family member's home
- » **16%** of visitors stayed at a hotel/motel/resort on their trip to Kennebec Valley



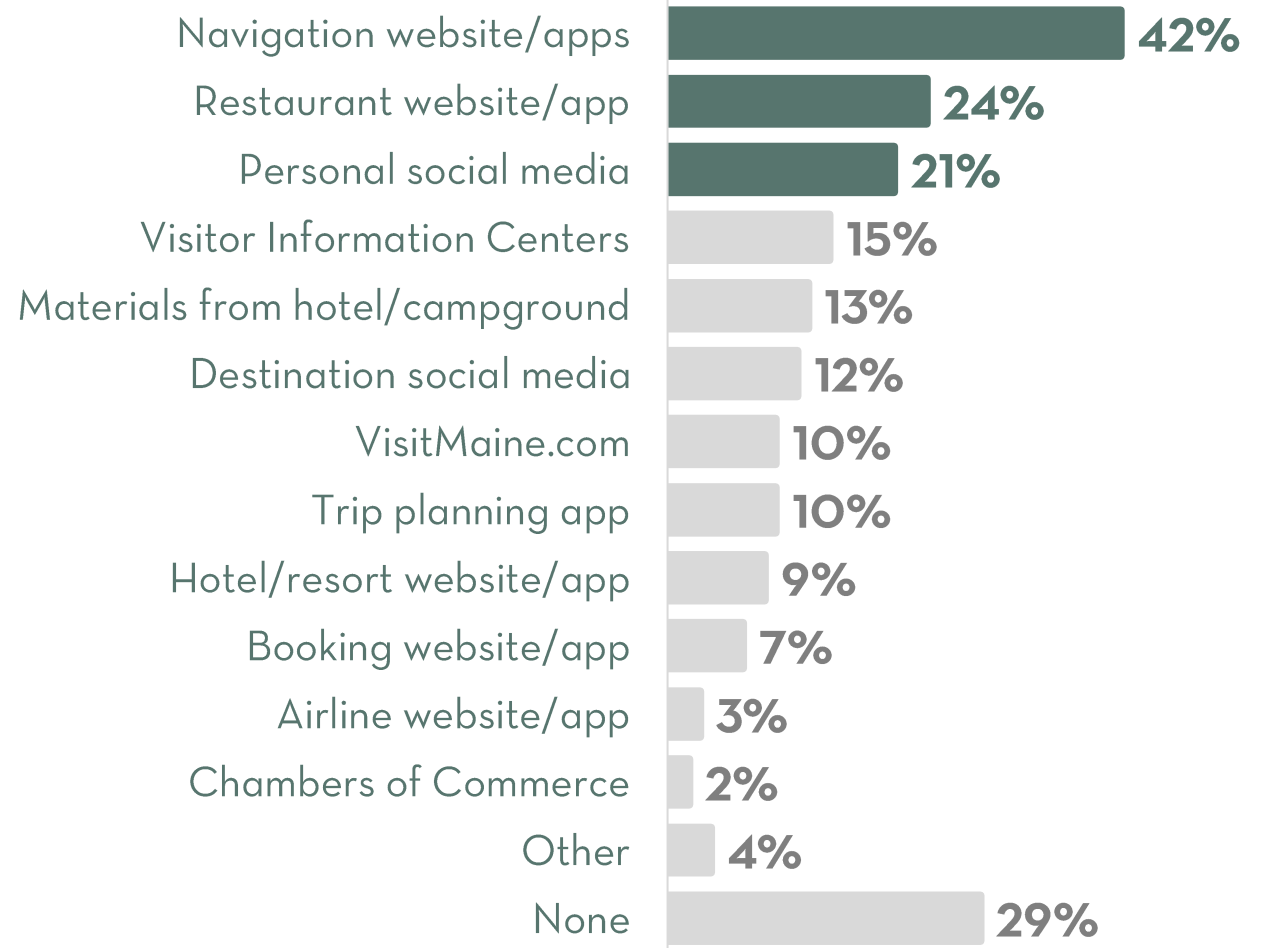
BOOKING METHODS

- » Over **1 in 3** visitors to Kennebec Valley who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



IN-MARKET VISITOR RESOURCES*

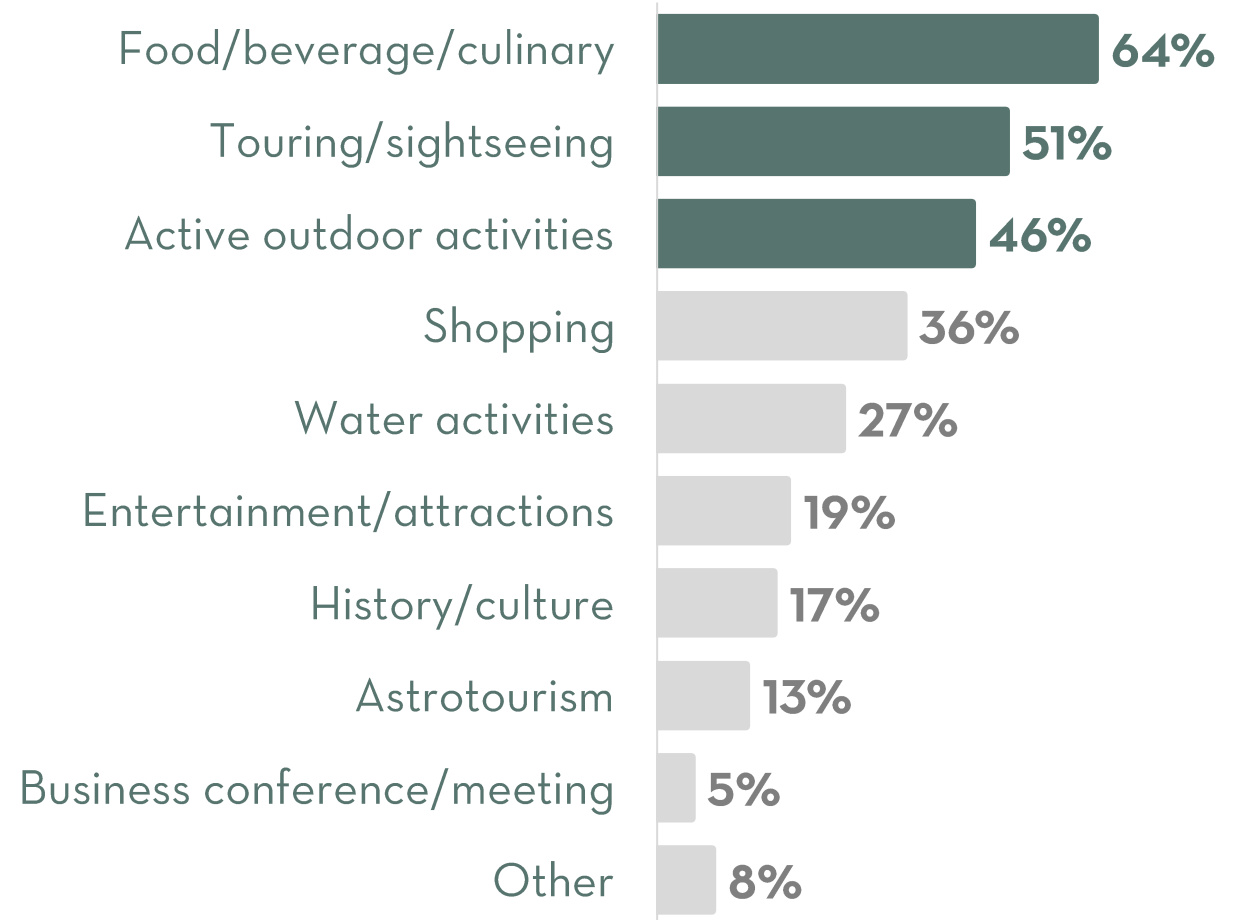
- » Visitors were most likely to rely on **navigation websites/apps** to plan activities in-market
- » About **1 in 4** visitors used a restaurant website or app
- » Nearly **3 in 10** visitors did not use any resources to plan activities while they were in Kennebec Valley



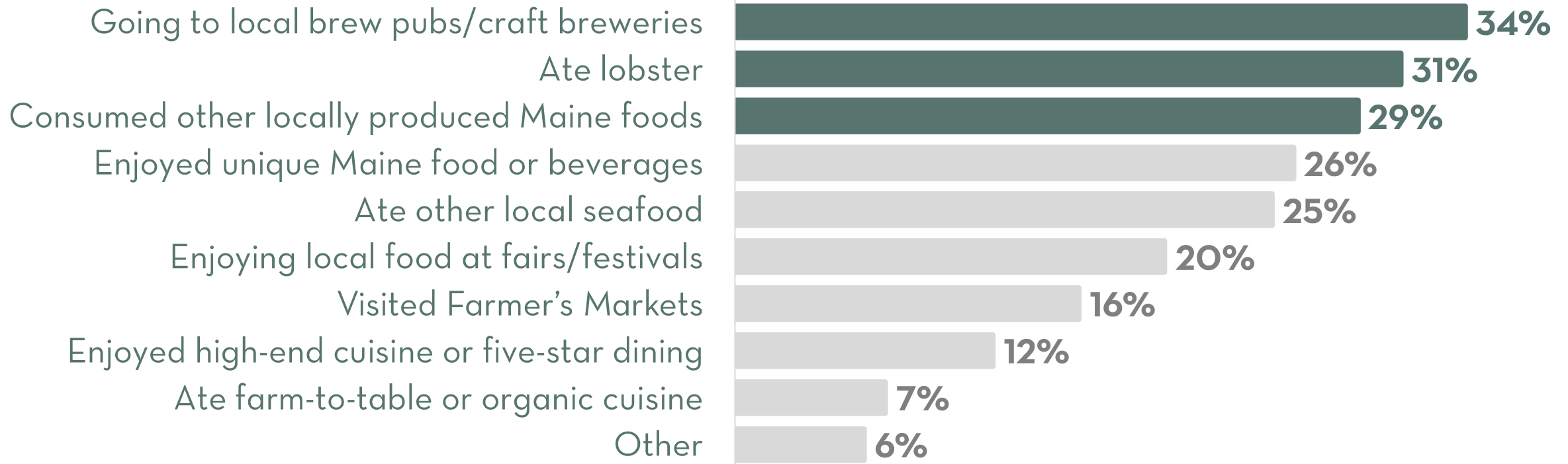
*Multiple responses permitted.

VISITOR ACTIVITIES*

- » **64%** of visitors engaged in food/beverage/culinary activities during their trip to Kennebec Valley
- » **Half** of visitors went touring/sightseeing during their trip to Kennebec Valley
- » Nearly **half** of visitors did active outdoor activities during their trip to Kennebec Valley

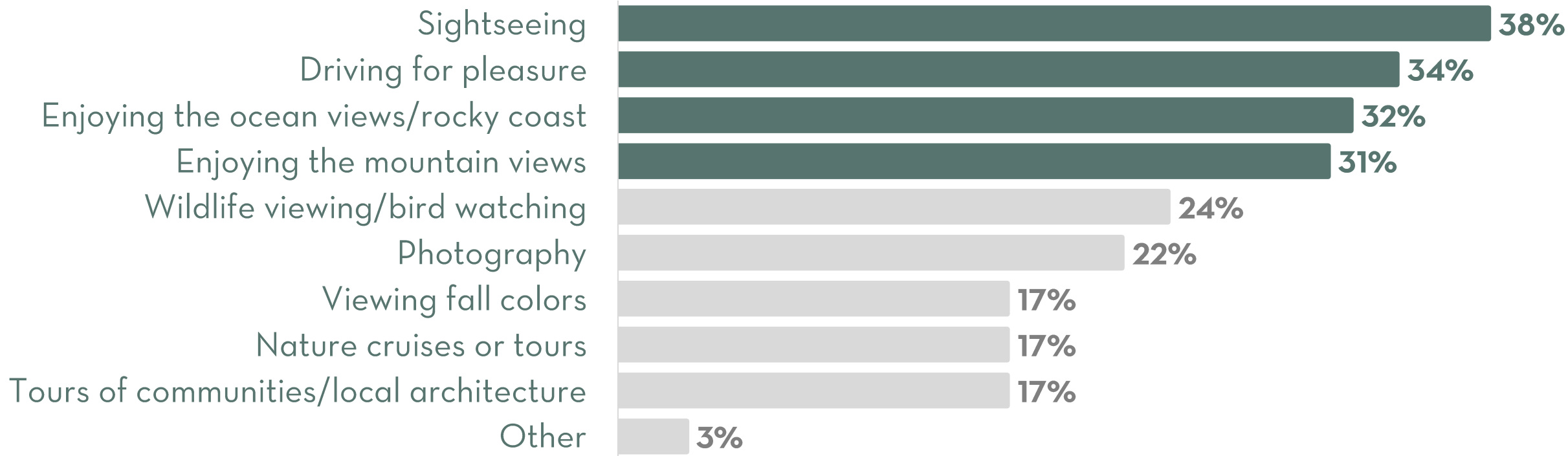


FOOD & BEVERAGE ACTIVITIES*

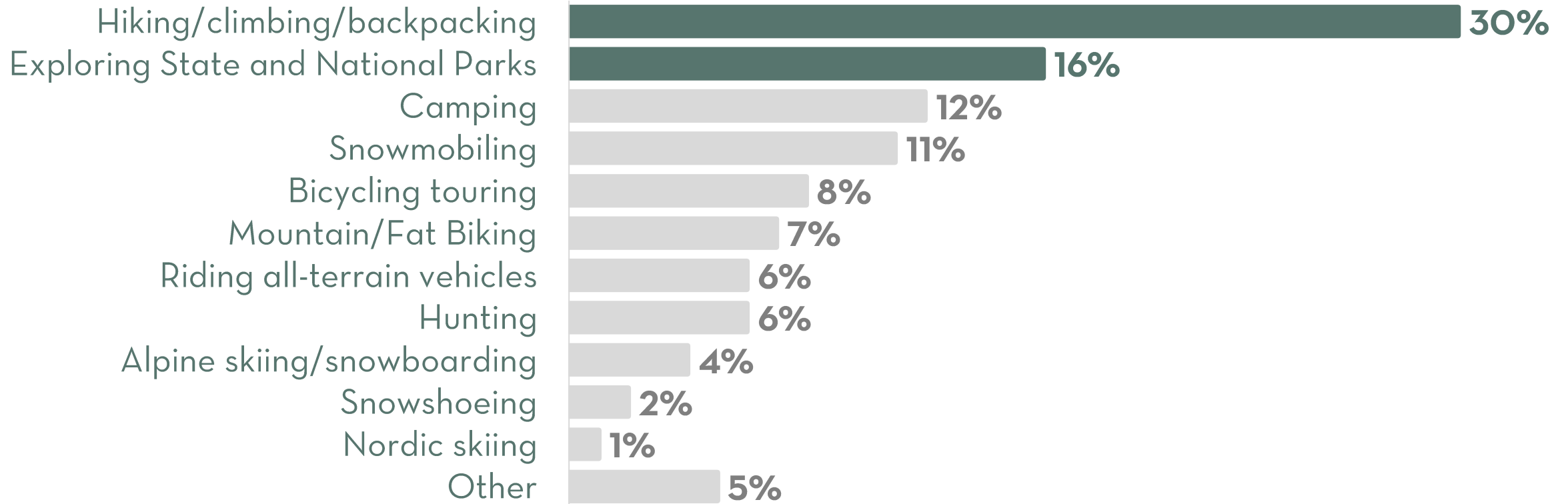


*Multiple responses permitted.

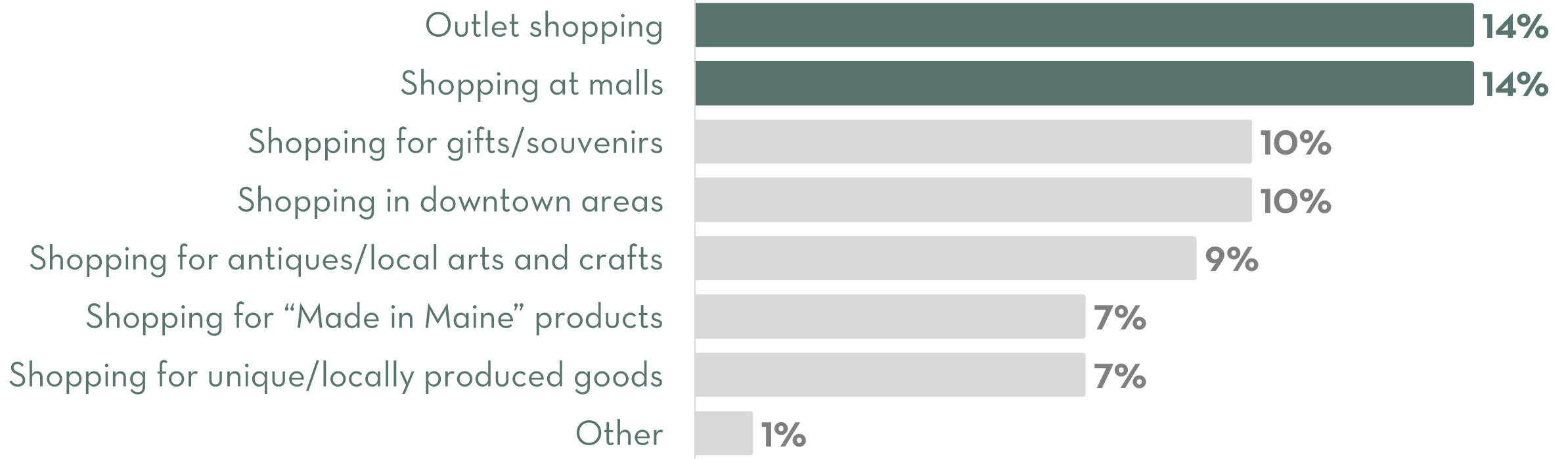
TOURING & SIGHTSEEING ACTIVITIES*



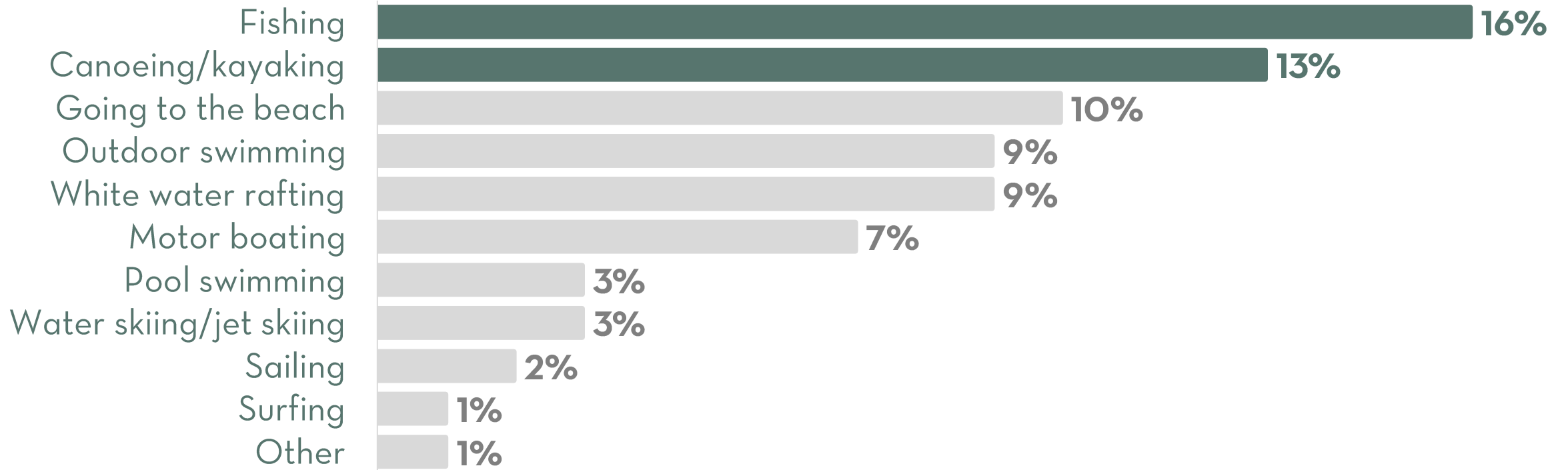
ACTIVE OUTDOOR ACTIVITIES*



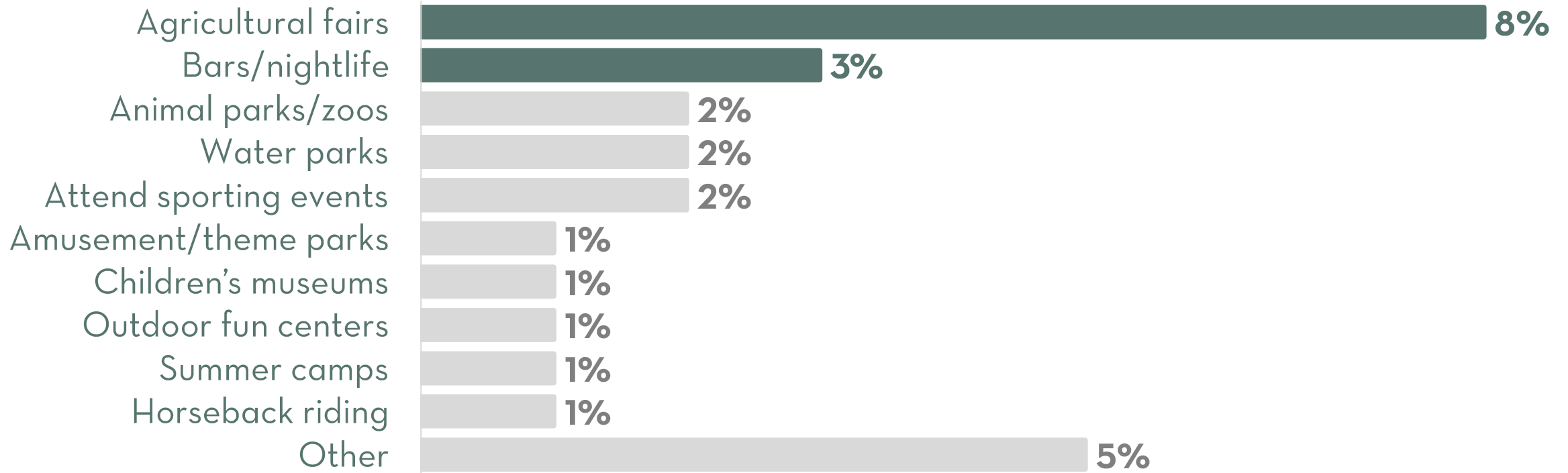
SHOPPING ACTIVITIES*



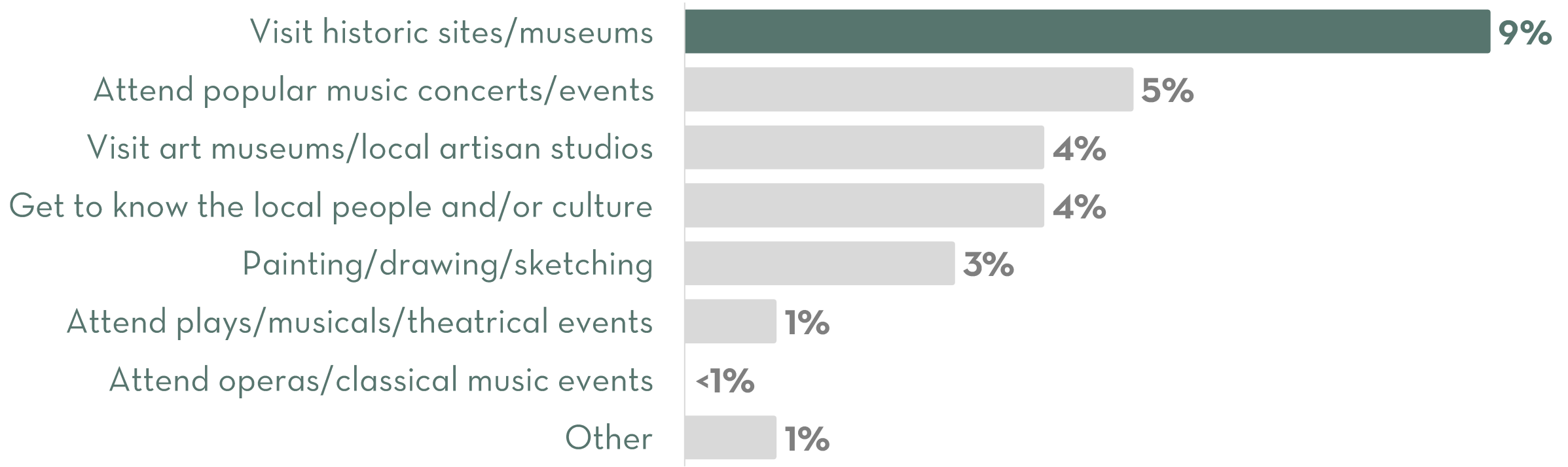
WATER ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

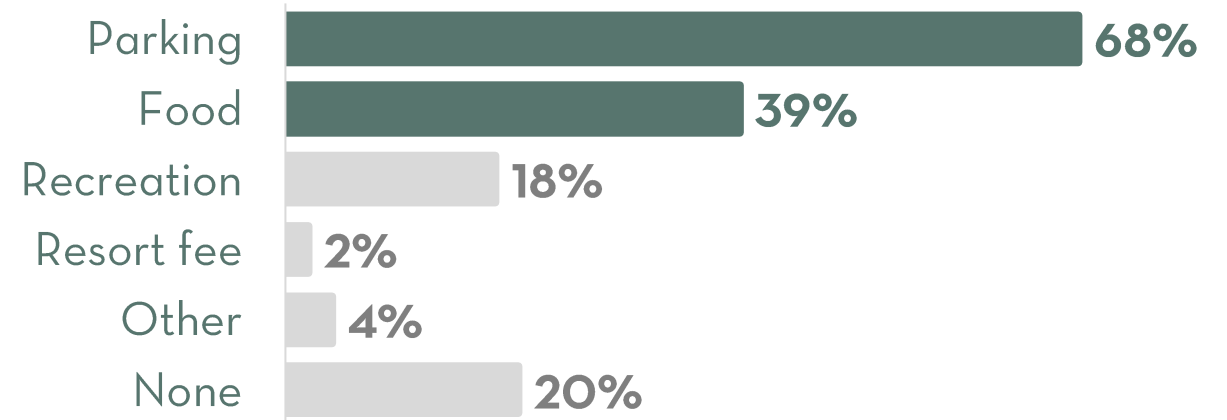
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$231	\$0	\$0
Restaurants	\$59	\$48	\$54
Groceries	\$40	\$42	\$22
Shopping	\$108	\$80	\$32
Activities & attractions	\$85	\$67	\$96
Transportation	\$104	\$61	\$36
Other	\$27	\$26	\$12
Daily Spending	\$654	\$324	\$252

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,441	\$0	\$0
Restaurants	\$378	\$378	\$54
Groceries	\$250	\$315	\$22
Shopping	\$706	\$645	\$32
Activities & attractions	\$512	\$495	\$96
Transportation	\$670	\$474	\$36
Other	\$171	\$207	\$12
Trip Spending	\$4,128	\$2,514	\$252

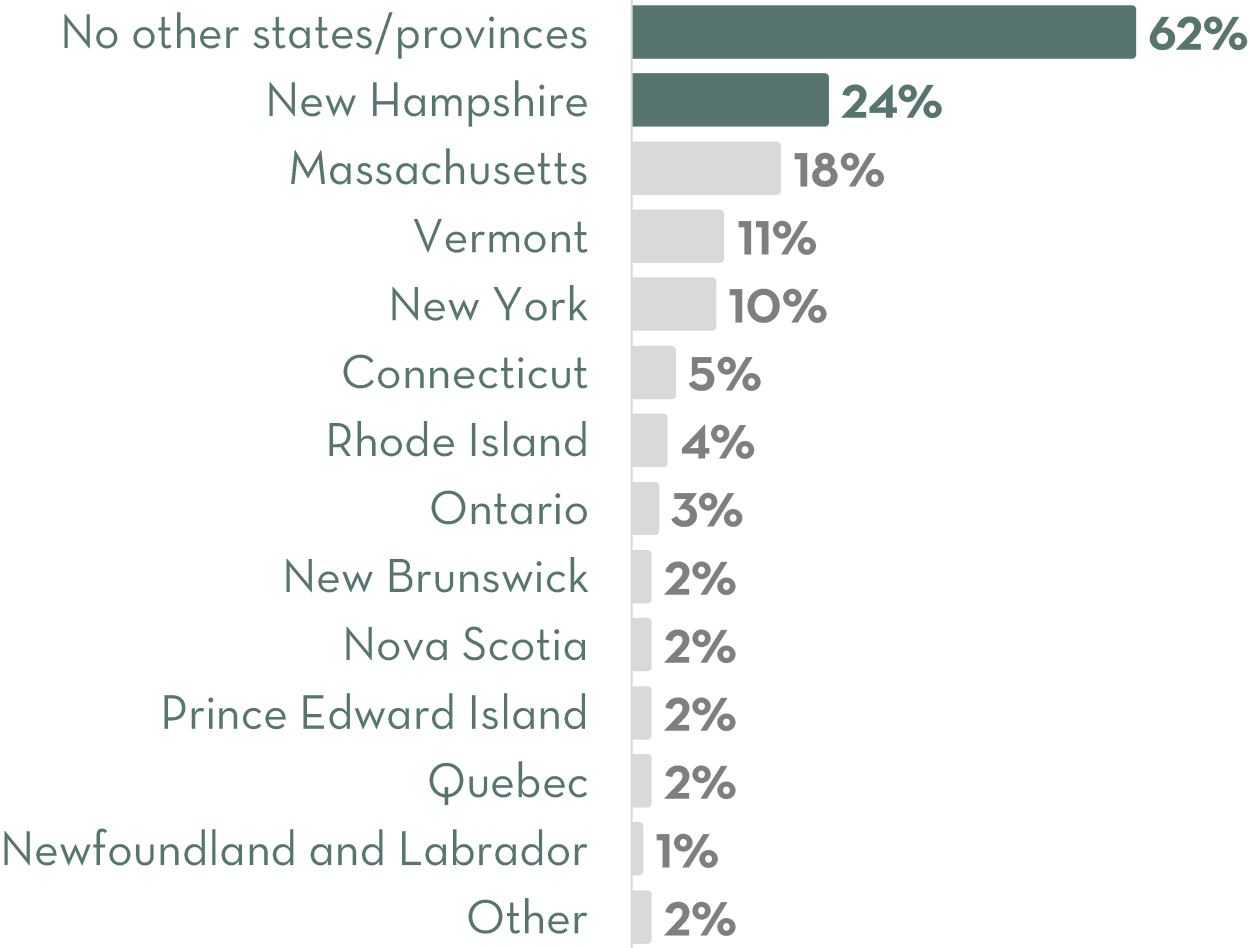
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc. was included in the room price for **4 in 5** visitors
- » Price for accommodations included parking for nearly **7 in 10** visitors
- » Food was included in accommodations' pricing for **2 in 5** visitors



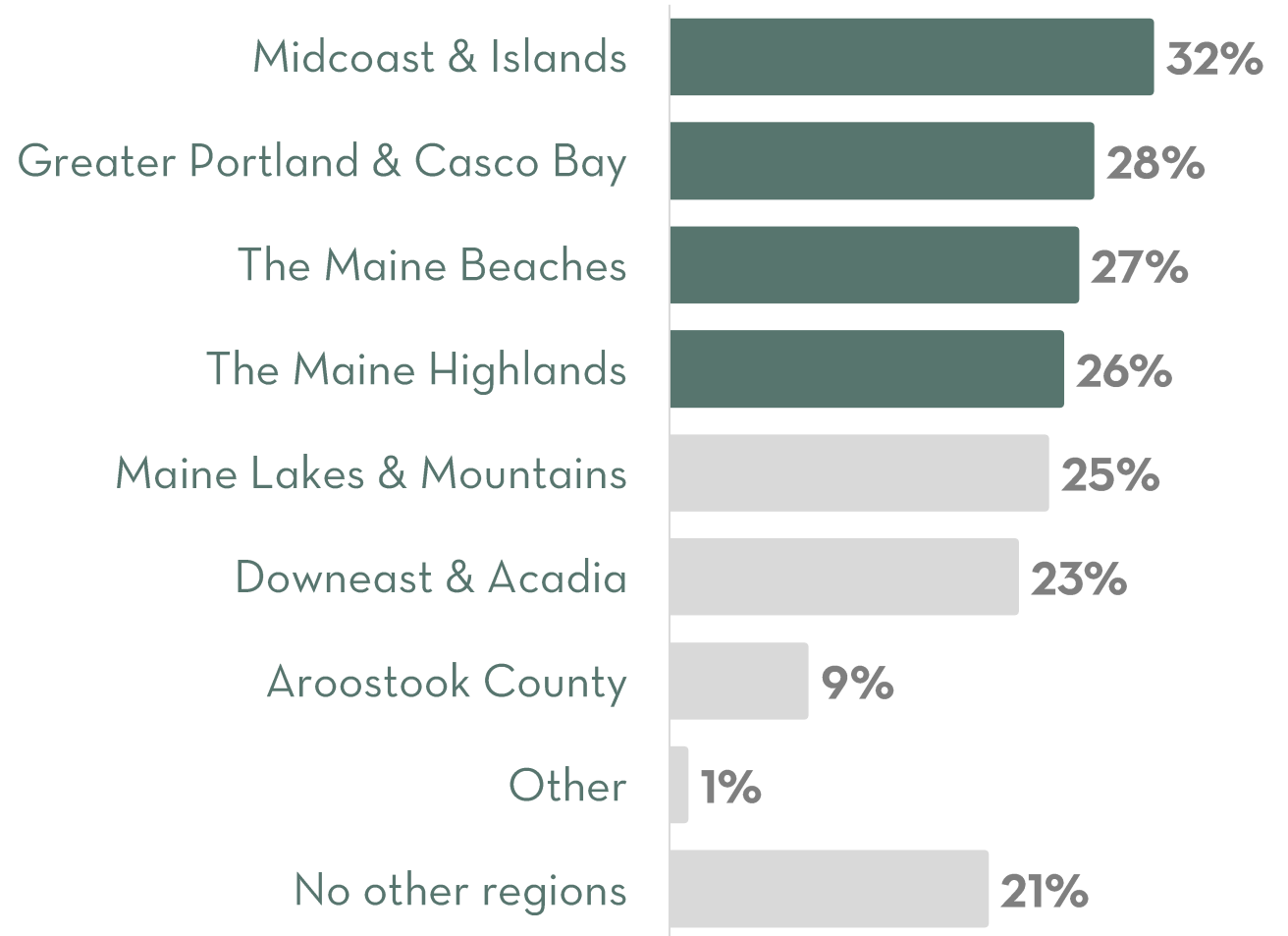
OTHER STATES & PROVINCES VISITED*

- » Over **3 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » Visitors continued to be **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE*

- » About **1 in 5** visitors stayed within Kennebec Valley during their trip in Maine, rather than traveling throughout the state
- » Nearly **1 in 3** of visitors to Kennebec Valley traveled to the Midcoast & Islands during their trip in Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION

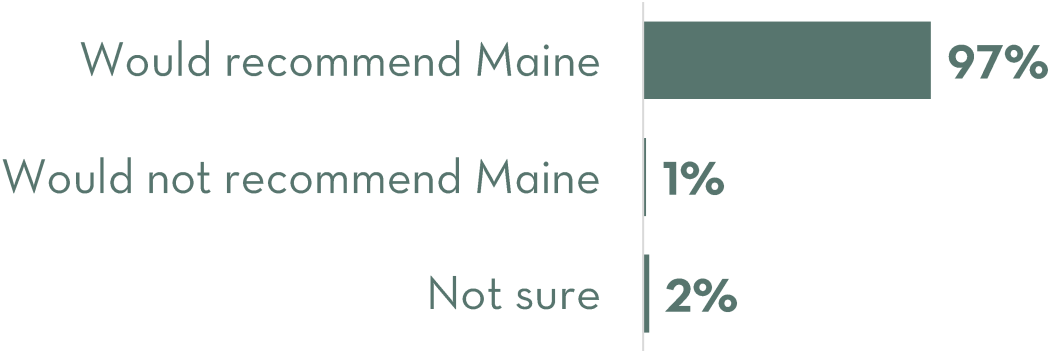


RECOMMENDING MAINE & ITS REGIONS

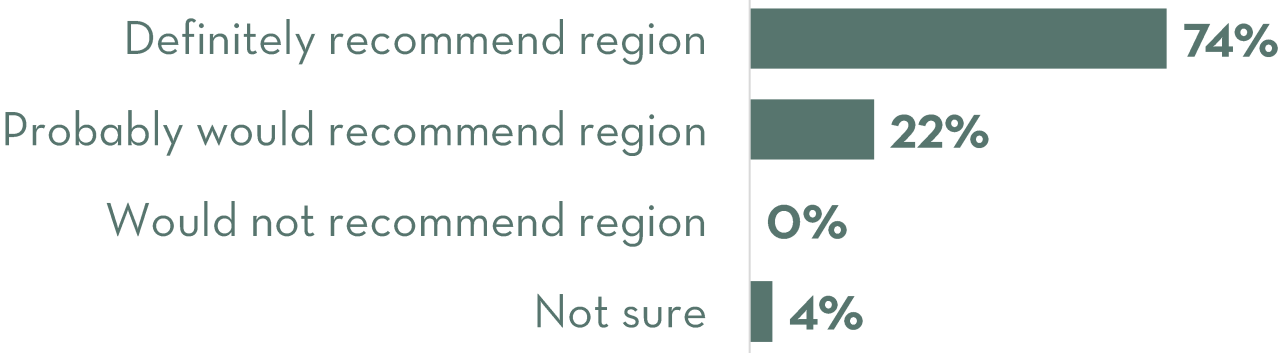
» **97%** of visitors to Kennebec Valley would recommend that their friends and family choose Maine as their destination for a future visit or vacation

» **96%** of visitors are likely to recommend that their friends and family visit Kennebec Valley

Likelihood of Recommending Maine

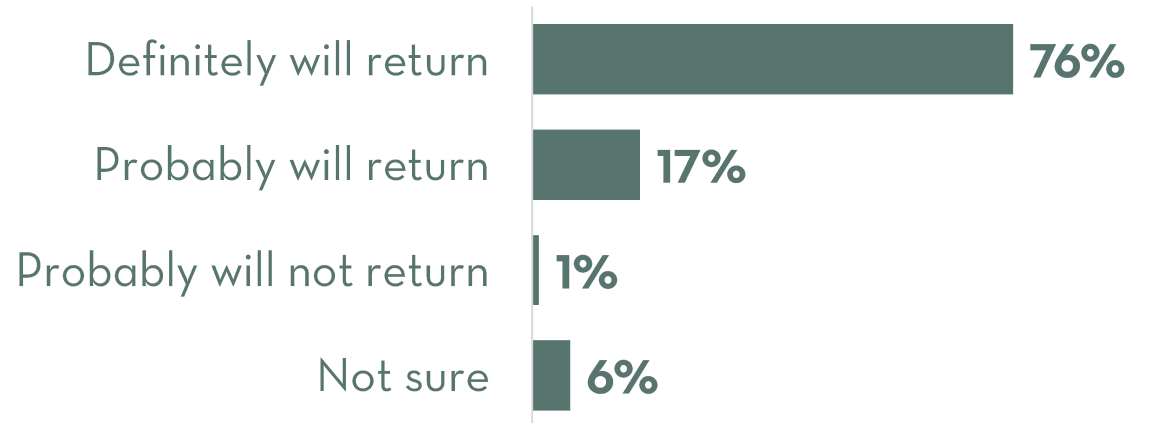


Likelihood of Recommending Region Visited



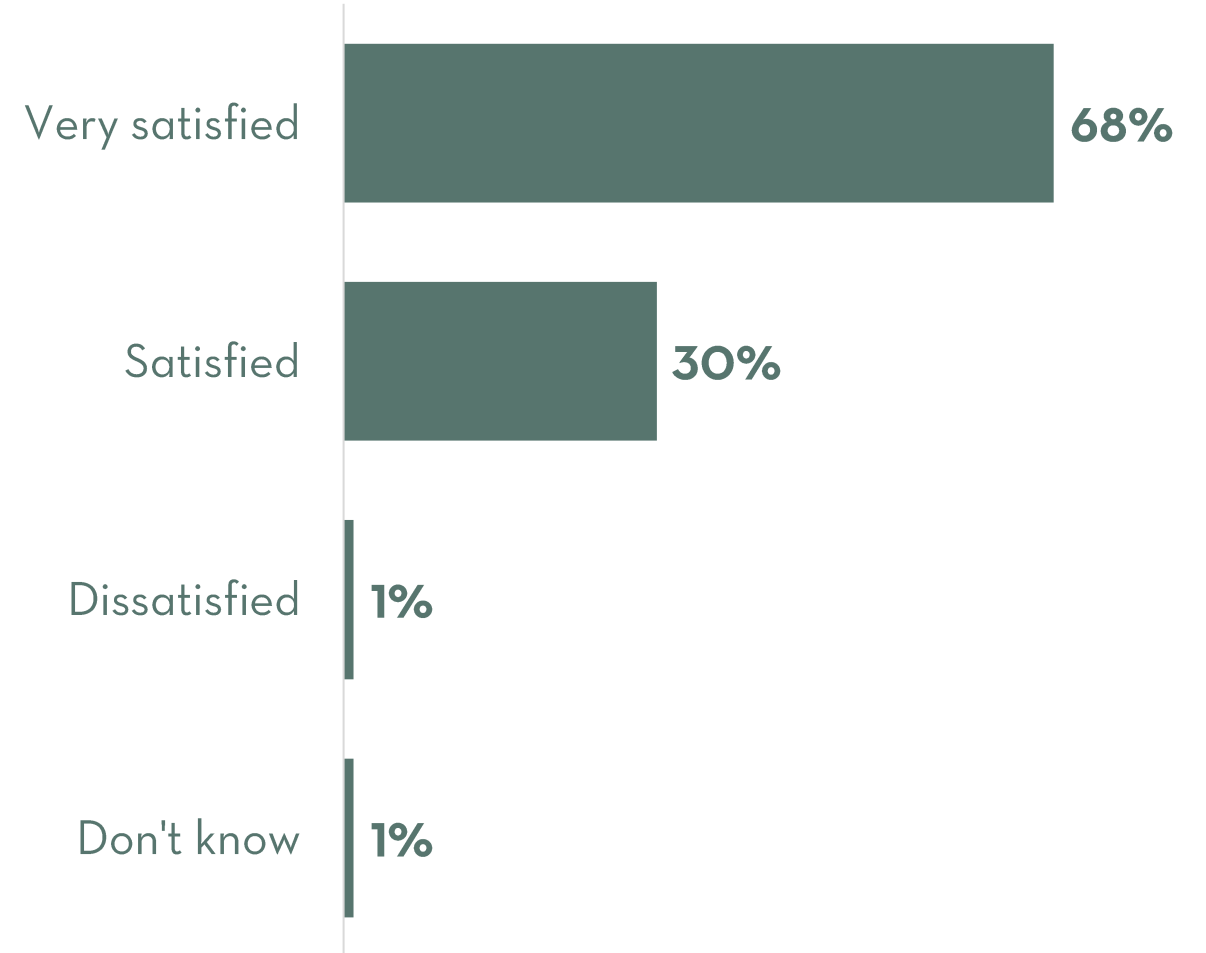
LIKELIHOOD OF RETURNING TO MAINE

- » **93%** of visitors to Kennebec Valley will return to Maine for a future visit or vacation

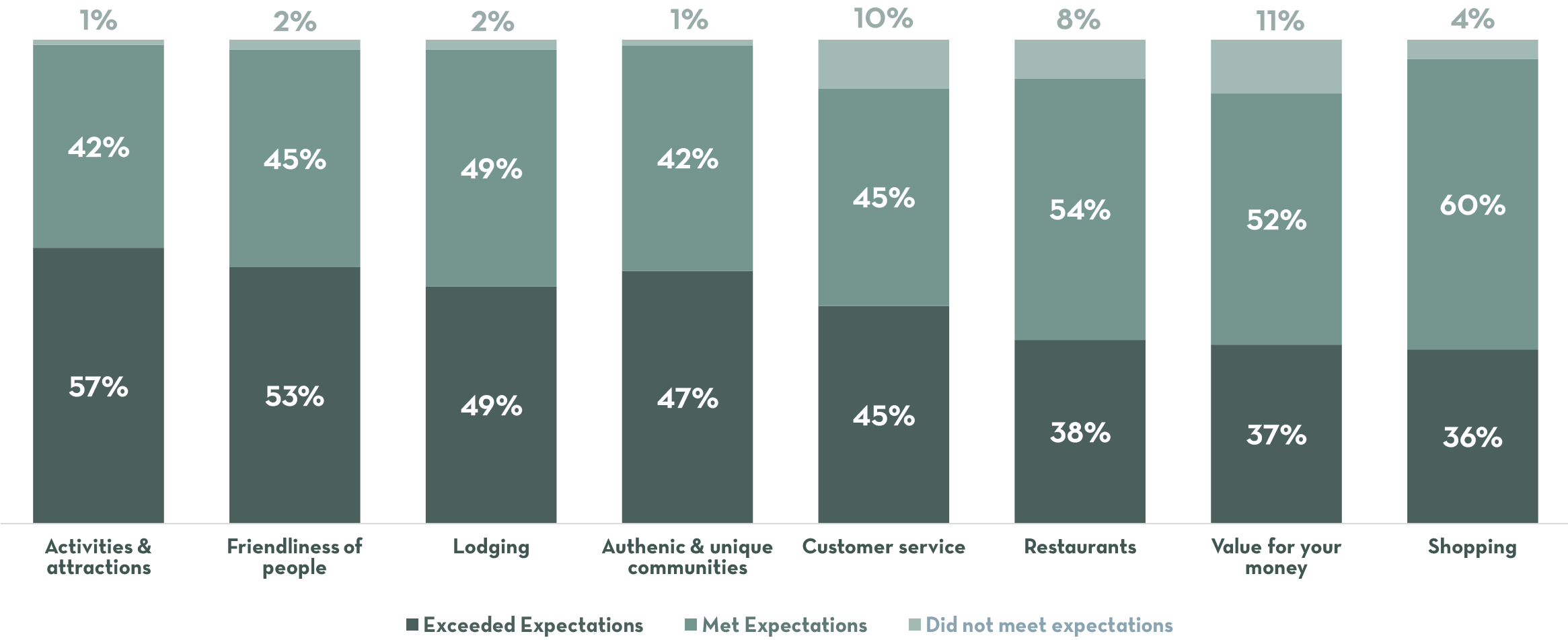


SATISFACTION

- » **98%** of visitors to Kennebec Valley were satisfied with their trip to Maine
- » Over **2 in 3** visitors were very satisfied with their trip to Maine

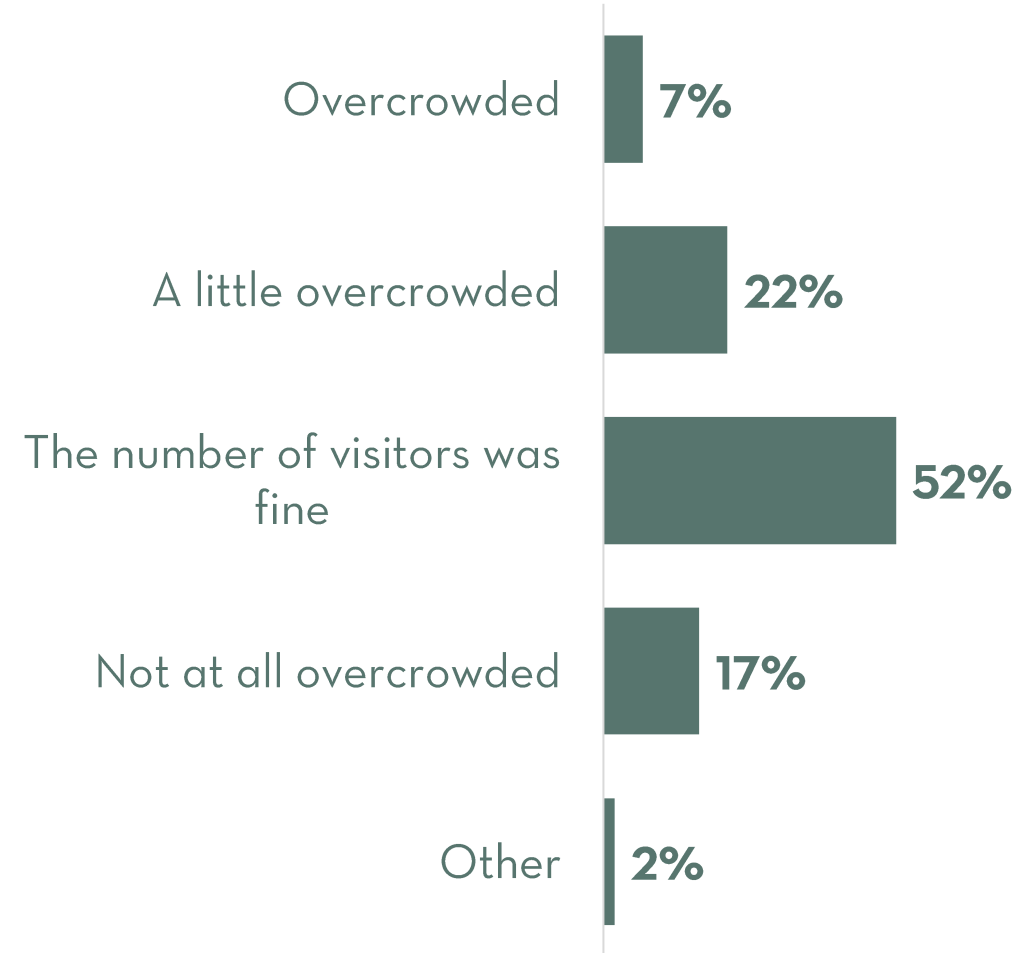


TRIP EXPECTATIONS



OVERCROWDING

- » **52%** of visitors to Kennebec Valley thought the number of visitors during their trip was fine
- » **22%** of visitors though it was a little overcrowded



ANNUAL COMPARISONS



TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

Trip Planning Cycle	2021	2022
A week or less	25%	19%
2 - 3 weeks	20%	14%
1 - 2 months	24%	25%
3 - 4 months	13%	16%
5 - 6 months	6%	10%
7 months - 1 year	4%	9%
More than 1 year	8%	7%
Days in Planning Cycle	36	50

Booking Window	2021	2022
A week or less	32%	26%
2 - 3 weeks	24%	16%
1 - 2 months	21%	24%
3 - 4 months	11%	15%
5 - 6 months	5%	9%
7 months - 1 year	3%	7%
More than 1 year	4%	3%
Days in Booking Window	19	40

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2021	2022
Online search engines	21%	25%
VisitMaine.com	11%	17%
Traveler reviews/blogs/stories	8%	12%
TripAdvisor	8%	11%
Facebook	9%	11%
Hotel websites	10%	11%
Visit Maine social media	6%	10%
Airbnb	9%	9%
Online travel agency	13%	9%
Instagram	7%	9%
KennebecValley.org	3%	8%
MaineTourism.com	7%	7%
YouTube	6%	6%
MaineLakesandMountains.com	3%	6%
DowneastAcadia.com	3%	5%
Airline websites	7%	5%
VRBO/HomeAway	5%	4%
TheMaineBeaches.com	3%	4%
Vacation rental websites	4%	4%
MainesMidCoast.com	3%	4%
DiscoverNewEngland.com	3%	3%
VisitBarHarbor.com	3%	3%
VisitAroostook.com	2%	2%
TheMaineHighlands.com	2%	2%
VisitPortland.com	3%	2%
Twitter	3%	2%
Other	9%	7%
None	44%	33%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2021	2022
Advice from friends/family	31%	40%
Articles or travelogues	7%	16%
AAA	6%	12%
Travel guides/brochures	11%	10%
Travel planning apps	9%	9%
Travel books & magazines	10%	8%
Called the Maine Office of Tourism	4%	6%
Visitor Guide	5%	5%
Visit Maine e-newsletter	4%	4%
Called local convention and visitors bureaus	4%	3%
Called local Chambers of Commerce	3%	2%
Called another Maine Tourism/Lodging Association	3%	2%
Travel agent	4%	2%
Other	6%	6%
None	50%	38%

REASON FOR VISITING*

Reasons for Visiting	2021	2022
Sightseeing/touring	19%	29%
Visiting friends/relatives	37%	28%
Relax and unwind	29%	27%
Nature & bird watching	14%	22%
Special occasion	13%	12%
Active outdoor activities	10%	11%
Water activities	6%	10%
Snow activities	5%	9%
Special event	4%	8%
Shopping	9%	8%
Attractions	5%	7%
Conference/meeting	6%	5%
Beach	5%	4%
Culture/museums/history	5%	3%
Sporting event	1%	2%
Astrotourism	1%	1%
Other	6%	10%

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2021	2022
No other states/provinces	66%	62%
New Hampshire	15%	21%
Vermont	10%	15%
Massachusetts	11%	13%
New York	8%	10%
Connecticut	4%	5%
Rhode Island	5%	5%
Nova Scotia	3%	3%
Ontario	2%	3%
Quebec	2%	3%
New Brunswick	2%	2%
Newfoundland and Labrador	2%	2%
Prince Edward Island	2%	2%
Other	4%	3%

ADVERTISING/PROMOTIONS

Recalled Advertising	2021	2022
Yes	39%	48%
No	33%	34%
Not sure	28%	18%

Influenced by Advertising	2021	2022
Yes	NA	25%

ADVERTISING/PROMOTIONS*

Sources of Advertising Noticed*	2021	2022
Social media	37%	45%
Internet	34%	43%
Magazine	17%	22%
Radio	13%	20%
Cable or satellite television	18%	17%
Traveler reviews/blogs	13%	14%
Newspaper	9%	13%
AAA	8%	13%
VisitMaine.com	16%	11%
Maine travel/visitor guide	17%	10%
Brochure	7%	9%
Online streaming service	11%	7%
Music/podcast streaming	9%	6%
Billboard	6%	5%
Deal – based promotion	5%	3%
Other	10%	10%
Not sure	1%	1%

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2021	2022
Maine	29%	29%
New England	26%	26%
Mid-Atlantic	23%	19%
Southeast	8%	8%
Southwest	2%	2%
Midwest	7%	6%
West	3%	4%
Canada	1%	5%
International	1%	1%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2021	2022
Maine	29%	29%
Massachusetts	12%	13%
New York	10%	7%
New Hampshire	6%	5%
Pennsylvania	4%	5%
Connecticut	5%	4%
Florida	4%	4%
New Jersey	4%	3%
California	1%	2%
Maryland	3%	2%
Ohio	1%	2%
Rhode Island	1%	2%
Ontario	<1%	2%
Quebec	<1%	2%

ORIGIN MARKET

Origin Markets	2021	2022
New York City ¹	10%	7%
Boston	7%	7%
Waterville	5%	5%
Washington DC - Baltimore ²	4%	3%
Philadelphia	3%	3%
Augusta	1%	3%
Portland	3%	3%
Providence, RI	1%	2%
Palmyra	1%	2%

¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

² Includes some markets in Maryland, Virginia, and West Virginia.

TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2021	2022
Traveled alone	24%	19%
As a couple	30%	40%
As a family	30%	22%
With business associates	3%	2%
In a tour group	<1%	<1%
With other couples/friends	13%	17%
Other	<1%	<1%
Average Travel Party Size	2.7	2.9

TRAVEL WITH CHILDREN*

Children in Travel Party	2021	2022
No children	75%	84%
Children younger than 6	10%	6%
Children 6 – 12	12%	9%
Children 13 – 17	13%	9%

Gender	2021	2022
Male	46%	49%
Female	54%	51%

DEMOGRAPHIC PROFILE

Age	2021	2022
Under 25	17%	10%
25 – 34	26%	18%
35 – 44	20%	21%
45 – 54	15%	19%
55 – 65	11%	21%
Over 65	11%	11%
Median Age	39	46

Race/Ethnicity	2021	2022
White	87%	90%
Black	5%	3%
Asian	3%	2%
Hispanic	3%	2%
Indigenous	1%	1%
Other	1%	2%

LIFESTYLE PROFILE

Marital Status	2021	2022
Single/widowed	36%	31%
Married/living with partner	64%	69%

Employment Status	2021	2022
Employed full-time	52%	52%
Employed part-time	12%	10%
Contract/freelance/temporary employee	7%	8%
Retired	14%	17%
Not currently employed	9%	9%
Student	6%	4%

LIFESTYLE PROFILE

Household Income	2021	2022
Less than \$25,000	9%	8%
\$25,000 - \$49,999	13%	14%
\$50,000 - \$74,999	19%	20%
\$75,000 - \$99,999	22%	21%
\$100,000 - \$149,999	18%	20%
\$150,000 - \$199,999	10%	10%
\$200,000 - \$249,999	4%	3%
\$250,000 or more	5%	4%
Median Household Income	\$85,200	\$84,500

LIFESTYLE PROFILE

Educational Attainment	2021	2022
High school or less	23%	11%
Some college or technical school	16%	16%
College or technical school graduate	37%	52%
Graduate school	24%	21%

NEW & RETURNING VISITORS

Previous Trips to Maine	2021	2022
This is my first time	19%	18%
2 - 5 times	32%	32%
6 - 10 times	19%	18%
11+ times	30%	32%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2021	2022
Drove to Maine	76%	83%
Flew into Portland Intl Jetport	12%	5%
Flew into Bangor Intl Airport	5%	3%
Flew into Boston Logan Intl	1%	3%
Flew into Augusta State Airport	1%	1%
Flew into LaGuardia Intl Airport	<1%	1%
Took a motor coach tour or bus	2%	2%
Other	<1%	2%

LENGTH OF STAY

Nights Stayed	2021	2022
Not staying overnight	33%	23%
1 night	7%	6%
2 nights	11%	10%
3 nights	10%	14%
4 nights	7%	10%
5+ nights	32%	37%
Average Length of Stay	4.1	5.0

ACCOMMODATIONS

Accommodations	2021	2022
Friends/family home	20%	22%
Hotel/motel/resort	20%	16%
Personal second home	5%	12%
Campground/RV Park	6%	7%
Vacation rental home	6%	7%
Wilderness camping	3%	4%
Sporting camp/wilderness lodge	1%	4%
Bed & Breakfast/Inn	5%	2%
Outdoor Outfitter	<1%	1%
Other	1%	2%
Not spending the night	33%	23%

BOOKING

Booking Methods	2021	2022
Directly with the hotel/condo	42%	36%
Online travel agency	21%	21%
Airbnb	11%	11%
Short term rental service	8%	6%
Vacation rental company	3%	4%
Offline travel agent	2%	2%
Group tour operator	1%	1%
Travel package provider	1%	1%
Other	11%	18%

IN-MARKET RESOURCES*

In-Market Resources	2021	2022
Navigation website/apps	44%	42%
Restaurant website/app	17%	24%
Personal social media	14%	21%
Visitor Information Centers	15%	15%
Materials from hotel/campground	10%	13%
Destination social media	11%	12%
VisitMaine.com	9%	10%
Trip planning app	10%	10%
Hotel/resort website/app	11%	9%
Booking website/app	9%	7%
Airline website/app	6%	3%
Chambers of Commerce	3%	2%
Other	3%	4%
None	34%	29%

ACTIVITIES*

Activities	2021	2022
Food/beverage/culinary	60%	64%
Touring/sightseeing	43%	51%
Active outdoor activities	46%	46%
Shopping	35%	36%
Water activities	25%	27%
Entertainment/attractions	8%	19%
History/culture	20%	17%
Astrotourism	7%	13%
Business conference/meeting	6%	5%
Other	14%	8%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2021	2022
Going to local brew pubs/craft breweries	21%	34%
Ate lobster	25%	31%
Consumed other locally produced Maine foods	17%	29%
Enjoyed unique Maine food or beverages	19%	26%
Ate other local seafood	25%	25%
Enjoying local food at fairs/festivals	7%	20%
Visited Farmer's Markets	7%	16%
Enjoyed high-end cuisine or five-star dining	10%	12%
Ate farm-to-table or organic cuisine	9%	7%
Other	11%	6%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2021	2022
Sightseeing	29%	38%
Driving for pleasure	27%	34%
Enjoying the ocean views/rocky coast	29%	32%
Enjoying the mountain views	26%	31%
Wildlife viewing/bird watching	16%	24%
Photography	19%	22%
Viewing fall colors	10%	17%
Nature cruises or tours	11%	17%
Tours of communities/local architecture	7%	17%
Other	1%	3%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2021	2022
Hiking/climbing/backpacking	32%	30%
Exploring State and National Parks	17%	16%
Camping	10%	12%
Snowmobiling	7%	11%
Bicycling touring	5%	8%
Mountain/Fat Biking	4%	7%
Riding all-terrain vehicles	4%	6%
Hunting	3%	6%
Alpine skiing/snowboarding	8%	4%
Snowshoeing	2%	2%
Nordic skiing	2%	1%
Other	5%	5%

SHOPPING ACTIVITIES*

Shopping Activities	2021	2022
Outlet shopping	23%	14%
Shopping at malls	18%	14%
Shopping for gifts/souvenirs	12%	10%
Shopping in downtown areas	11%	10%
Shopping for antiques/local arts and crafts	7%	9%
Shopping for “Made in Maine” products	8%	7%
Shopping for unique/locally produced goods	7%	7%
Other	3%	1%

WATER ACTIVITIES*

Water Activities	2021	2022
Fishing	15%	16%
Canoeing/kayaking	10%	13%
Going to the beach	8%	10%
Outdoor swimming	10%	9%
White water rafting	1%	9%
Motor boating	6%	7%
Pool swimming	3%	3%
Water skiing/jet skiing	2%	3%
Sailing	4%	2%
Surfing	<1%	1%
Other	1%	1%

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2021	2022
Agricultural fairs	1%	8%
Bars/nightlife	4%	3%
Animal parks/zoos	4%	2%
Water parks	3%	2%
Attend sporting events	1%	2%
Amusement/theme parks	3%	1%
Children's museums	3%	1%
Outdoor fun centers	3%	1%
Summer camps	2%	1%
Horseback riding	2%	1%
Other	2%	5%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2021	2022
Visit historic sites/museums	12%	9%
Attend popular music concerts/events	2%	5%
Visit art museums/local artisan studios	8%	4%
Get to know the local people and/or culture	10%	4%
Painting/drawing/sketching	3%	3%
Attend plays/musicals/theatrical events	2%	1%
Attend operas/classical music events	1%	<1%
Other	2%	1%

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2021	2022
No other states/provinces	68%	62%
New Hampshire	20%	24%
Massachusetts	14%	18%
Vermont	7%	11%
New York	8%	10%
Connecticut	5%	5%
Rhode Island	4%	4%
Ontario	2%	3%
New Brunswick	1%	2%
Nova Scotia	2%	2%
Prince Edward Island	1%	2%
Quebec	1%	2%
Newfoundland and Labrador	1%	1%
Other	3%	2%

TRAVELING IN MAINE*

Maine Regions Visited	2021	2022
Midcoast & Islands	31%	32%
Greater Portland & Casco Bay	39%	28%
The Maine Beaches	25%	27%
The Maine Highlands	28%	26%
Maine Lakes & Mountains	22%	25%
Downeast & Acadia	26%	23%
Aroostook County	10%	9%
Other	1%	1%
No other regions	16%	21%

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2021	2022
Would recommend Maine	96%	97%
Would not recommend Maine	1%	1%
Not sure	3%	2%

Recommending Regions	2021	2022
Definitely recommend region	74%	74%
Probably would recommend region	19%	22%
Would not recommend region	1%	0%
Not sure	6%	4%

SATISFACTION

Satisfaction	2021	2022
Very satisfied	NA	68%
Satisfied	NA	30%
Dissatisfied	NA	1%
Don't know	NA	1%

RETURNING TO MAINE

Returning to Maine	2021	2022
Definitely will return	78%	76%
Probably will return	18%	17%
Probably will not return	1%	1%
Not sure	3%	6%

TRIP EXPECTATIONS

Exceeded Expectations	2021	2022
Activities & attractions	50%	57%
Friendliness of people	56%	53%
Lodging	45%	49%
Authentic & unique communities	50%	47%
Customer service	48%	45%
Restaurants	45%	38%
Value for your money	41%	37%
Shopping	41%	36%

OVERCROWDING

Overcrowding	2021	2022
Overcrowded	NA	7%
A little overcrowded	NA	22%
The number of visitors was fine	NA	52%
Not at all overcrowded	NA	17%
Other	NA	2%

STUDY METHODS



METHODOLOGY



Visitor Tracking

371 interviews were completed with visitors to Kennebec Valley online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2021, and November 30th, 2022.

Economic Impact

Total economic impact of tourism on Kennebec Valley is a function of direct spending by visitors to Kennebec Valley, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to Kennebec Valley. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Kennebec Valley's multiplier is 1.56.

KENNEBEC VALLEY

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022

Downs & St. Germain Research
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