

MAINE LAKES & MOUNTAINS

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022

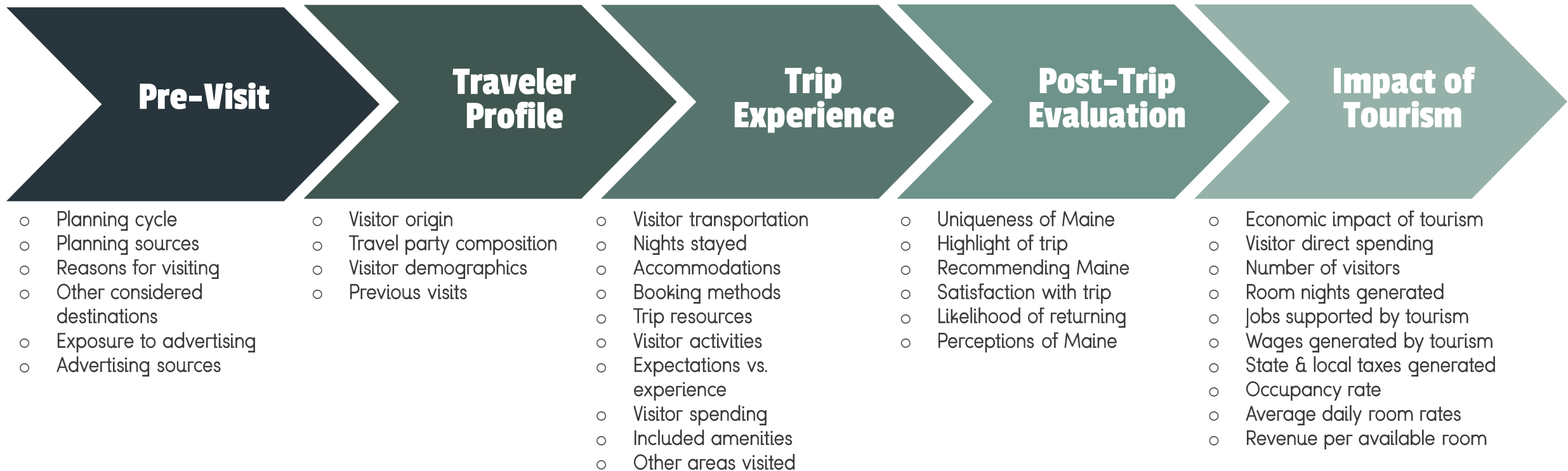


INTRODUCTION



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Maine Lakes & Mountains 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 Maine Lakes & Mountains.



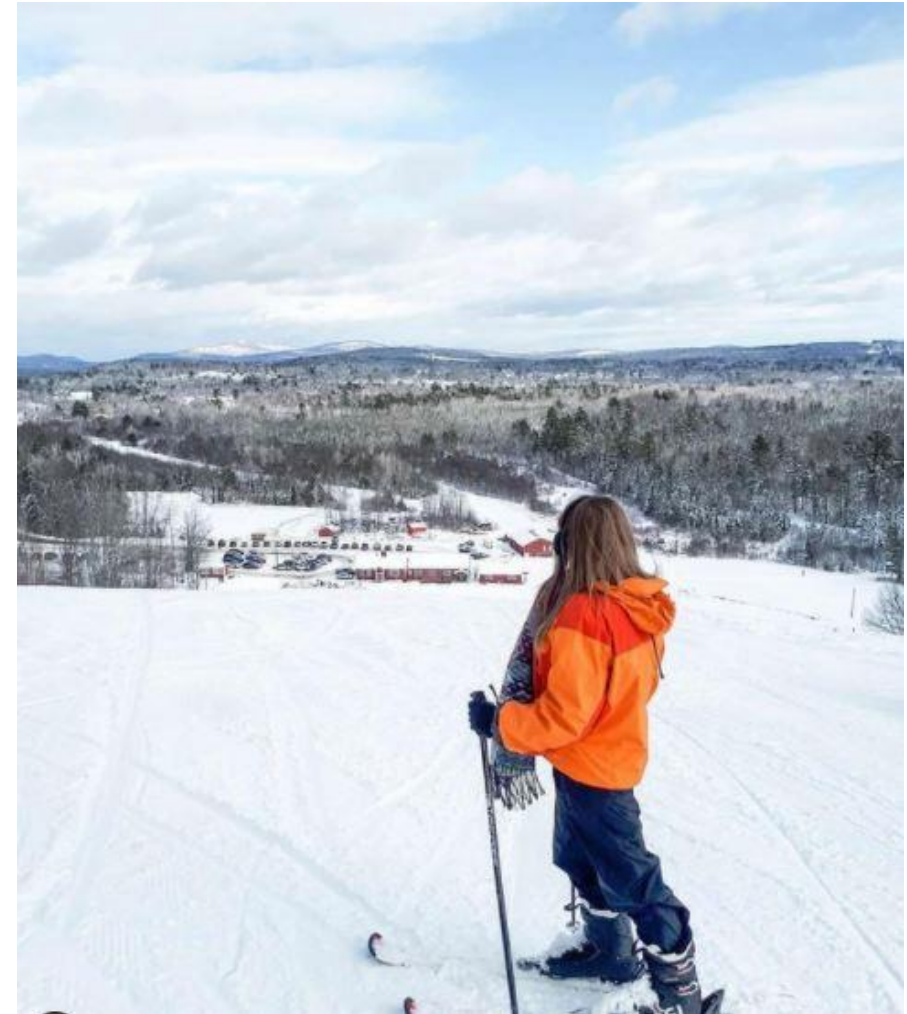
EXECUTIVE SUMMARY



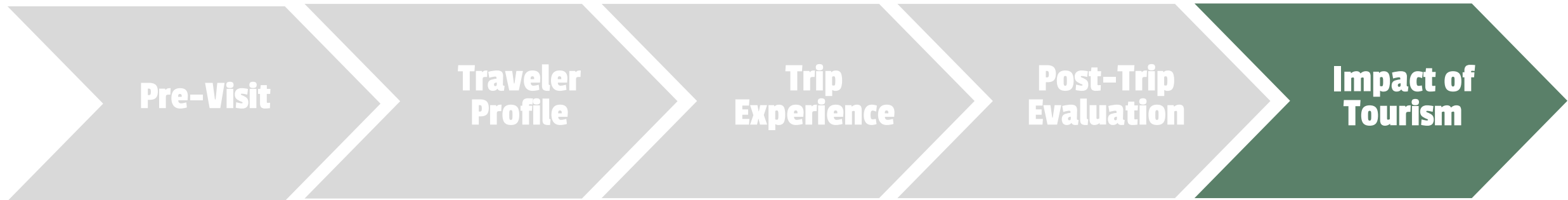
MAINE LAKES & MOUNTAINS

Compared to visitors to other regions, visitors to Maine Lakes & Mountains region are likely to:

- » Use AAA to plan their trip
- » Visit Maine for the day
- » Definitely recommend visiting the region



TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,775,825,100

in economic impact to Maine Lakes & Mountain's economy, up **+0.4%** from 2021



DIRECT SPENDING

Visitors to Maine Lakes & Mountains spent

\$1,127,957,800

throughout the county in 2022 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **+1.0%** from 2021



VISITORS

Maine Lakes & Mountains attracted

1,936,700

visitors in 2022, down **3.3%** from 2021



VISITORS DAYS*

All visitors to Maine Lakes & Mountains spent

8,808,100

days in Maine Lakes & Mountains 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 Maine Lakes & Mountains spent

1,560,700

nights in Maine Lakes & Mountains
accommodations throughout 2022, down
2.7% from 2021



JOBS SUPPORTED

Visitors to Maine Lakes & Mountains
supported the creation of

18,200

jobs throughout the county in 2022, down
10.3% from 2021



WAGES GENERATED

Visitors to Maine Lakes & Mountains supported

\$587,082,200

in wages paid to Maine Lakes & Mountains employees in 2022, down **4.7%** from 2021



VISITORS & JOBS

Every

106

visitors supports a new job in Maine Lakes & Mountains



HOUSEHOLD SAVINGS

Visitors to Maine Lakes & Mountains saved
local households

\$1,326

in state and local taxes in 2022



LODGING METRICS

Occupancy Rate

53.8%

+ 7.2% from 2021

Average Daily Rate

\$224.03

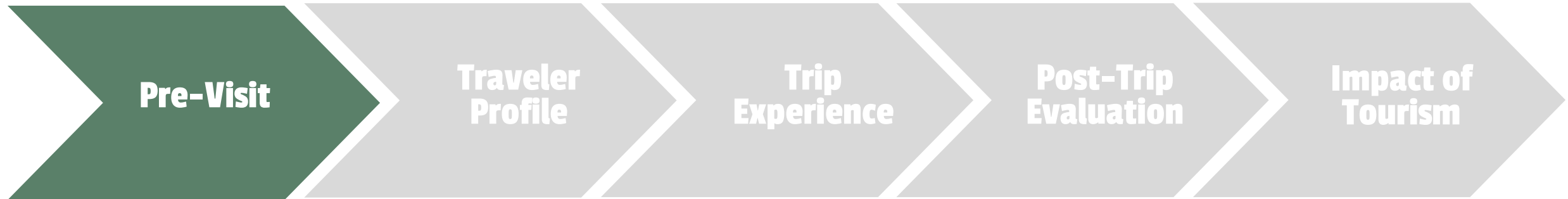
+ 13.7% from 2021

Revenue per Available Room

\$120.53

+ 21.9% from 2021

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » **Over 1 in 3** visitors started planning their trip a month or more in advance of their trip
- » **3 in 5** visitors have a booking window of less than 3 months

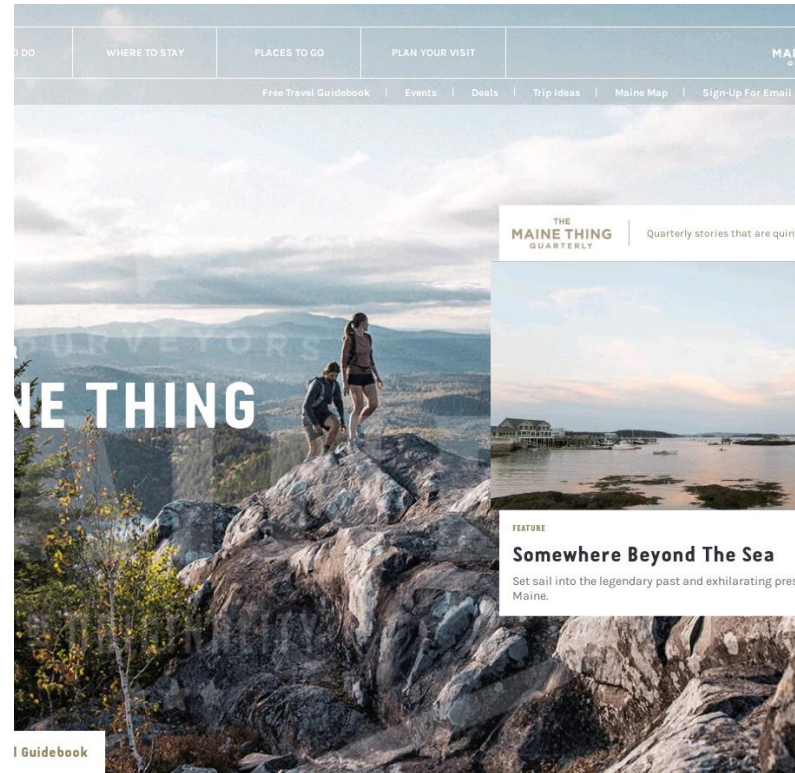


TOP ONLINE TRIP PLANNING SOURCES*

7 in 10 visitors used one or more online resources to help them plan their trip in Maine Lakes & Mountains



35% Online search engines



21% VisitMaine.com

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



38% Advice from friends/family



23% Articles or travelogues



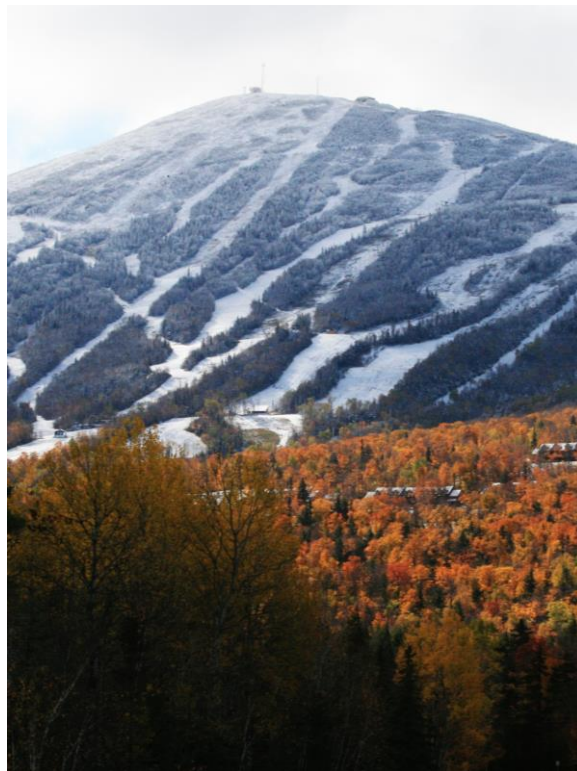
22% AAA

*Multiple responses permitted.

TOP REASONS FOR VISITING*



33%
Sightseeing/touring



27% Relax and
unwind



25% Nature & bird
watching



21% Visiting
friends/family

*Multiple responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » **54%** (-6% points from 2021) of visitors did not consider visiting any U.S. state or Canadian province instead of Maine Lakes & Mountains 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

- » **49%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to Maine Lakes & Mountains (**+1%** from 2021)
- » This information influenced **32%** of all visitors to visit Maine



TOP SOURCES OF ADVERTISING EXPOSURE*

Base: 49% who noticed advertising



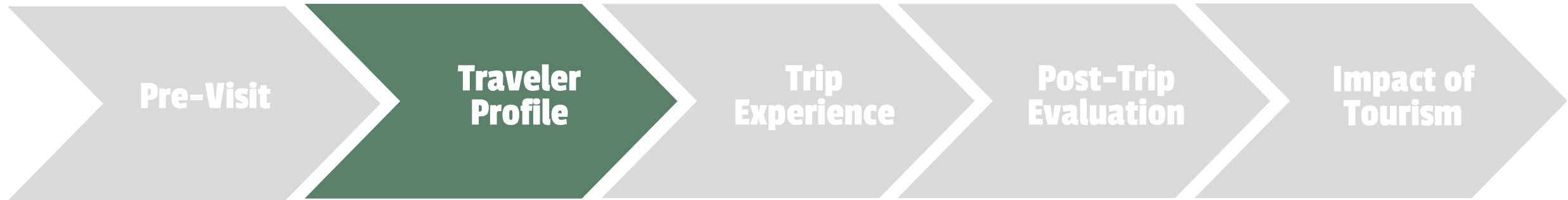
44% Social media



42% Internet

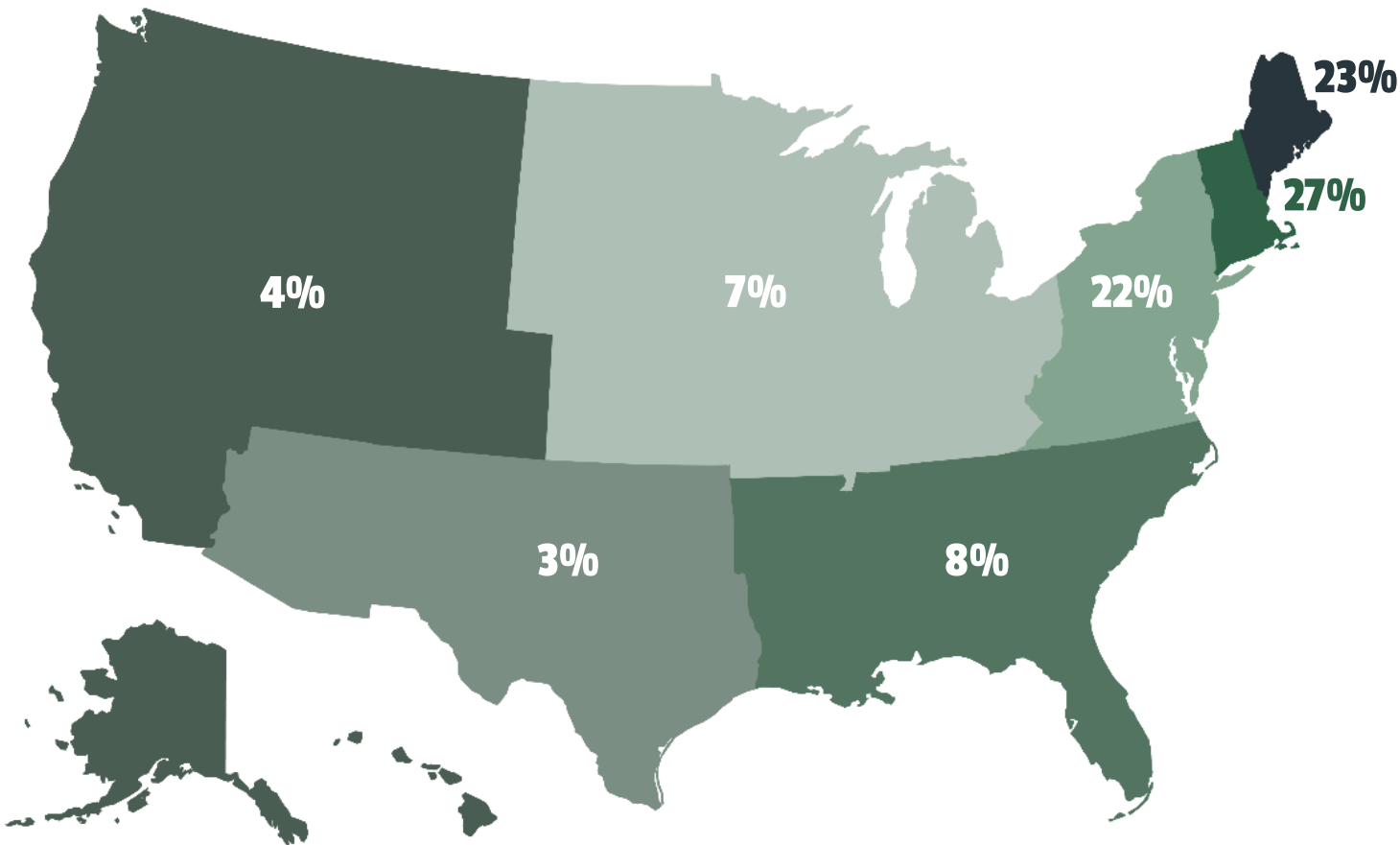
*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN

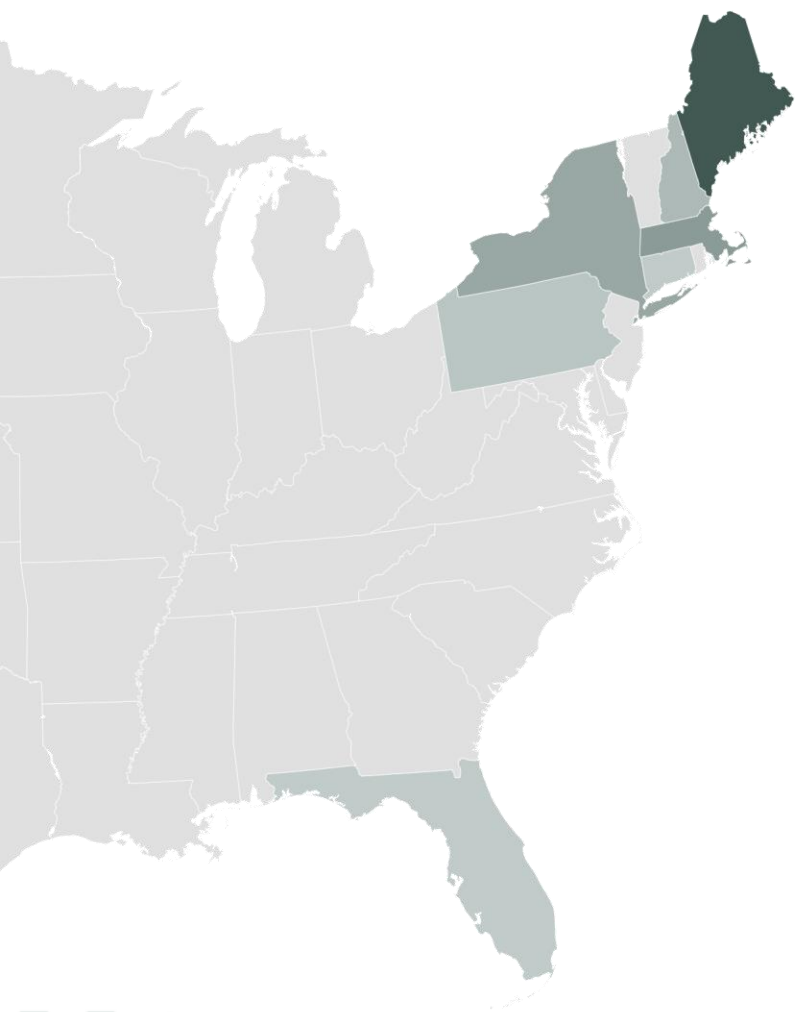
International travel is rebounding as international visitation increased **+5% points** from 2021



2% of visitors came from outside of the United States and Canada

4% of visitors came Canada

TOP ORIGIN STATES & PROVINCES



65%

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

- | | | | |
|-------------|---------------|------------|--------------|
| 23 % | Maine | 5 % | Pennsylvania |
| 12 % | Massachusetts | 4 % | Connecticut |
| 10 % | New York | 4 % | Florida |
| 7 % | New Hampshire | | |

TOP ORIGIN MARKETS



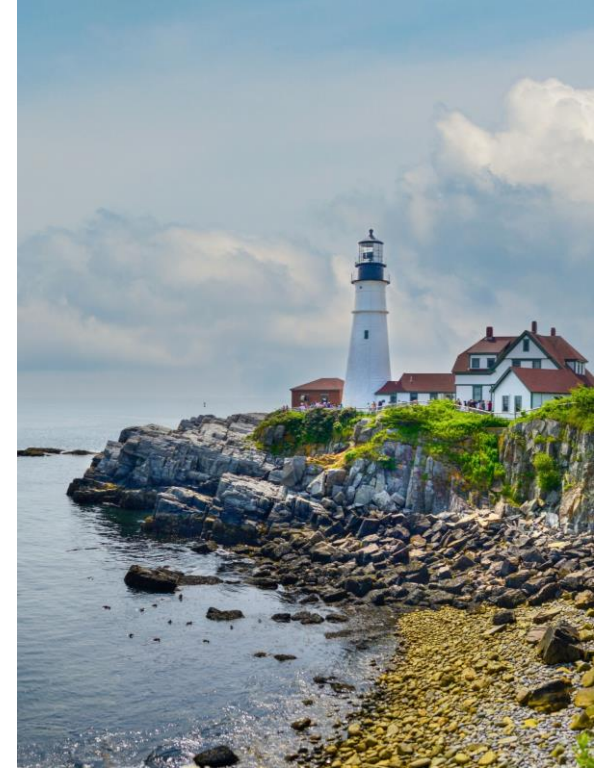
9% New York City¹



9% Boston



4% Philadelphia



4% Portland, ME

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

TRAVEL PARTIES

The typical Maine Lakes & Mountains visitor traveled with **2.8** people in their visitor party



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



DEMOGRAPHIC PROFILE

» The typical Maine Lakes & Mountains visitor:

- » Is **46** years old¹
- » Female² - **53%**
- » Is white - **89%**



¹Median age.

²Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Maine Lakes & Mountains visitor:
 - » Is a college graduate – **79%**
 - » Is married/in a domestic partnership – **77%**
 - » Is employed full-time – **55%**
 - » Has an annual household income¹ of **\$89,300**



¹Median household income.

NEW & RETURNING VISITORS

- » **23%** of visitors to Maine Lakes & Mountains were traveling in Maine for the first time
- » **31%** of visitors to Maine Lakes & Mountains had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **83%** of visitors drove to their Maine Lakes & Mountains destination
- » **5%** of visitors to Maine Lakes & Mountains flew to Maine through Boston Logan International Airport



NIGHTS STAYED

- » **72%** of visitors spent one or more nights in Maine Lakes & Mountains
- » Typical visitors stayed **4.6*** nights in Maine Lakes & Mountains on their trip



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

TOP ACCOMMODATIONS



28% Did not stay overnight



18% Friends/family home



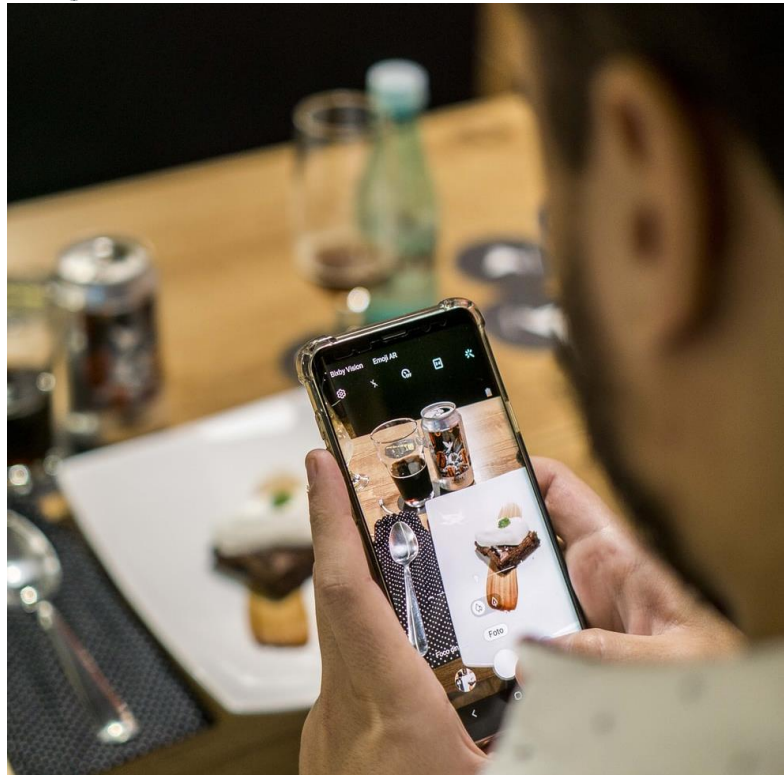
15% Hotel/motel/resort

TOP IN-MARKET VISITOR RESOURCES*

Over **2 in 3** visitors used one or more in-market resources to help them plan places to go while in Maine Lakes & Mountains



42% Navigation websites/apps



29% Restaurant website/app



23% Personal social media

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*

*Multiple responses permitted.



60%

Food/beverage/culinary



47%

Touring/sightseeing



47%

Active outdoor activities

TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in Maine Lakes & Mountains spent **\$614** per day and **\$4,014** during their trip
- » Visitors who stayed overnight in unpaid accommodations in Maine Lakes & Mountains spent **\$286** per day and **\$1,886** during their trip
- » Visitors who did not stay overnight in Maine Lakes & Mountains spent **\$191** during their trip



VISITING OTHER STATES & PROVINCES

- » Over **1 in 2** visitors to Maine Lakes & Mountains did not visit any other U.S. state or Canadian province
- » Maine Lakes & Mountains visitors were **more likely** to visit US states (New Hampshire, Massachusetts, Vermont, and New York) as compared to Canadian provinces (Ontario, New Brunswick, Quebec, or Prince Edward Island).



TRAVELING WITHIN MAINE

» **Over 2 in 5** visitors to Maine Lakes & Mountains traveled to other regions during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **98%** of visitors to Maine Lakes & Mountains would recommend **Maine** to a friend or relative as a vacation destination
- » **98%** of visitors to Maine Lakes & Mountains would recommend that their friends and family visit the region
 - » **88%** would definitely recommend Maine Lakes & Mountains



LIKELIHOOD OF RETURNING TO MAINE

- » **89%** of visitors to Maine Lakes & Mountains will return to Maine for a future visit or vacation
- » **73%** of visitors will “definitely return” to Maine in the future



SATISFACTION

- » **99%** of visitors were satisfied with their trip to Maine Lakes & Mountains
- » However, increased cost and the current lack of work force negatively affected visitors' trip experiences: **13%** of visitors said that the customer service did not meet their expectations and **12%** said the value for their money did not meet their expectations



OVERCROWDING

- » **49%** of visitors thought the number of visitors during their trip to Maine Lakes & Mountains was fine
- » **30%** of visitors though 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	2,002,000	1,936,700	- 3.3%
Room nights generated	1,560,700	1,518,500	- 2.7%
Direct expenditures	\$1,116,494,700	\$1,077,957,800	- 3.5%
Total economic impact	\$1,768,002,500	\$1,697,106,500	- 4.0%

EMPLOYMENT IMPACTS

Maine Lakes & Mountains Jobs	2021	2022	Δ% from '21
Jobs generated (direct)	15,900	13,900	- 12.6%
Total employment impact	20,300	18,200	- 10.3%

Maine Lakes & Mountains Wages	2021	2022	Δ% from '21
Wages paid (direct)	\$421,639,300	\$401,927,100	- 4.7%
Total impact on wages	\$616,167,700	\$587,082,200	- 4.7%

RETURN ON INVESTMENT

Return on Investment	2021	2022
Visitors per job supported	99	106
State & local taxes supported	\$148,609,400	\$140,246,500
Tax savings per household	\$1,194*	\$1,326*

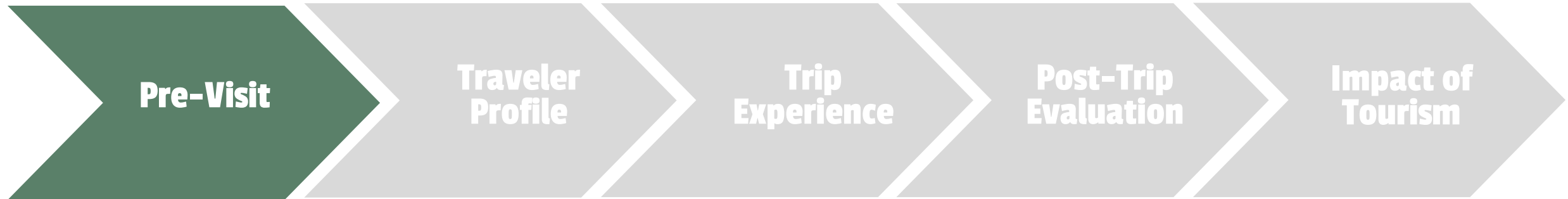
*The estimate of households in the region was calculated differently in 2022 resulting in a different household savings estimate.

LODGING METRICS

Lodging Metrics	2021*	2022	Δ% from '21
Occupancy Rate (%)	50.2%	53.8%	+ 7.2%
Average Daily Rate	\$196.98	\$224.03	+ 13.7%
RevPAR	\$98.88	\$120.53	+ 21.9%
Total Lodging Revenue	\$206,166,900	\$211,750,300	+ 2.7%

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

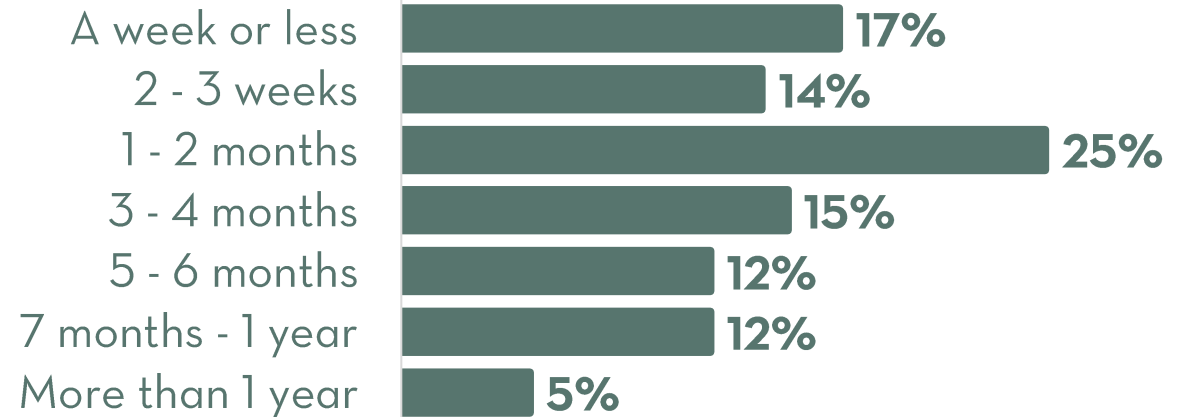
TRIP PLANNING CYCLE : PRE-VISIT



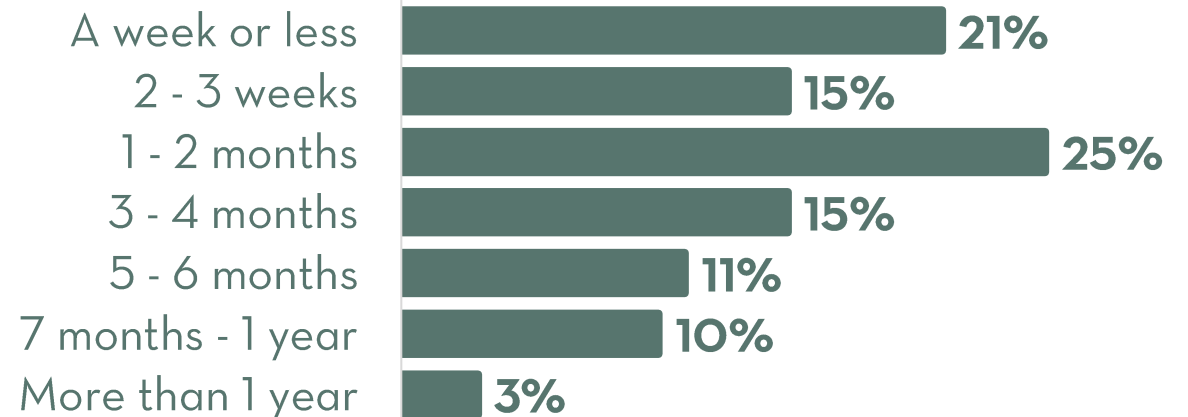
TRIP PLANNING CYCLE

- » Typical visitors to Maine Lakes & Mountains began planning their trip **53 days** in advance (+10 days from 2021)
- » **69%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **47 days** in advance (+14 days from 2021)
- » **3 in 5** visitors have a booking window of less than 3 months

Beginning of Trip Cycle

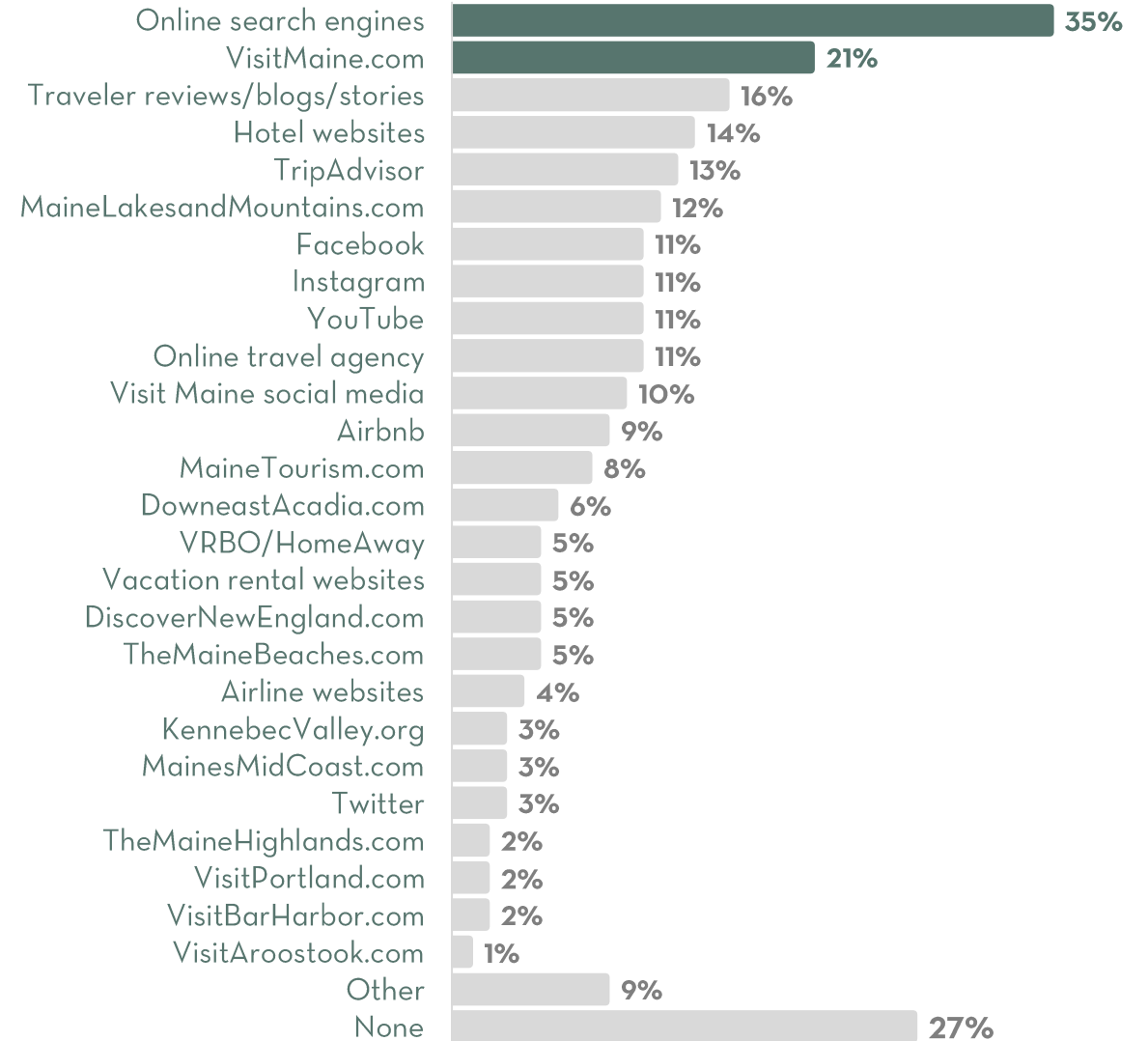


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

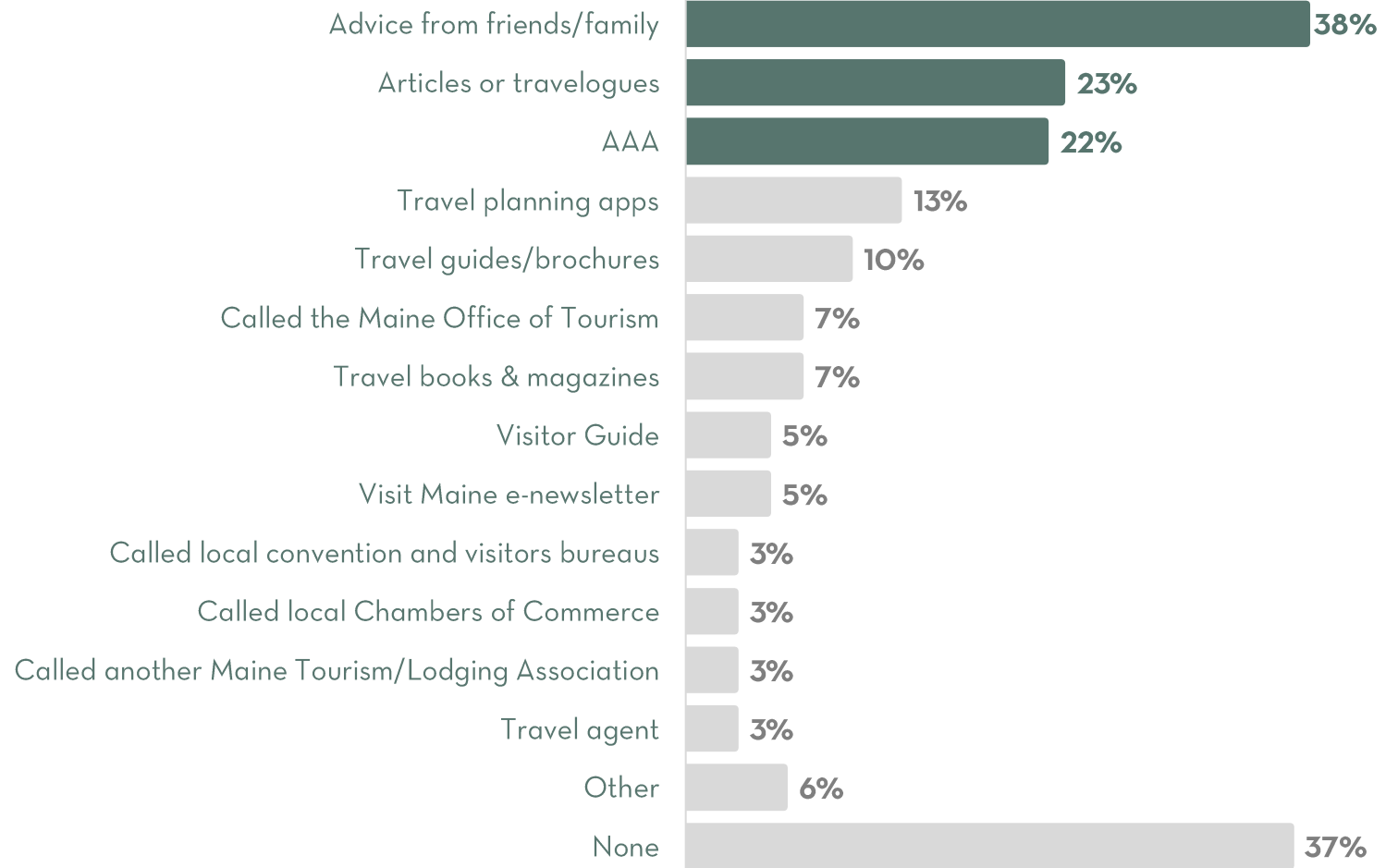
- » **7 in 10** visitors used one or more online resources to help them plan their trip to Maine Lakes & Mountains
- » Over **1 in 3** visitors used an online search engine, such as Google, to help them plan their trip to Maine Lakes & Mountains
- » About **1 in 5** visitors used VisitMaine.com (+7% points from 2021)
- » More visitors used MaineLakesandMountains.com (+5% points) compared to 2021



*Multiple responses permitted.

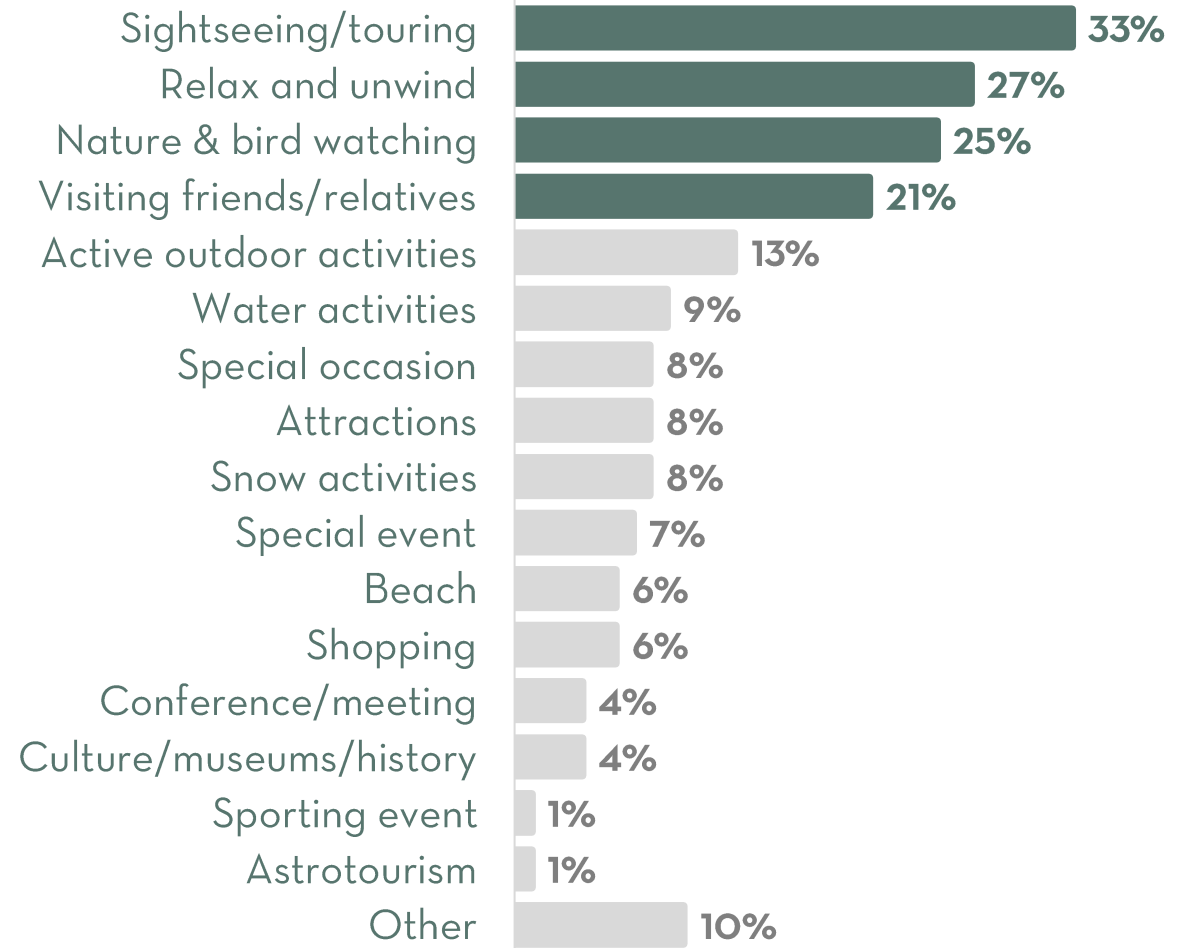
OTHER TRIP PLANNING SOURCES*

- » Nearly **2 in 5** visitors relied on advice from their friends and family to help them plan their trip to Maine Lakes & Mountains
- » Over **1 in 5** visitors used articles or travelogues (+8% points from 2021) and AAA (+8% points from 2021) to help plan their trip to Maine Lakes & Mountains
- » Over **1 in 3** visitors did not use any other resources to help them plan their trip to Maine Lakes & Mountains



REASONS FOR VISITING*

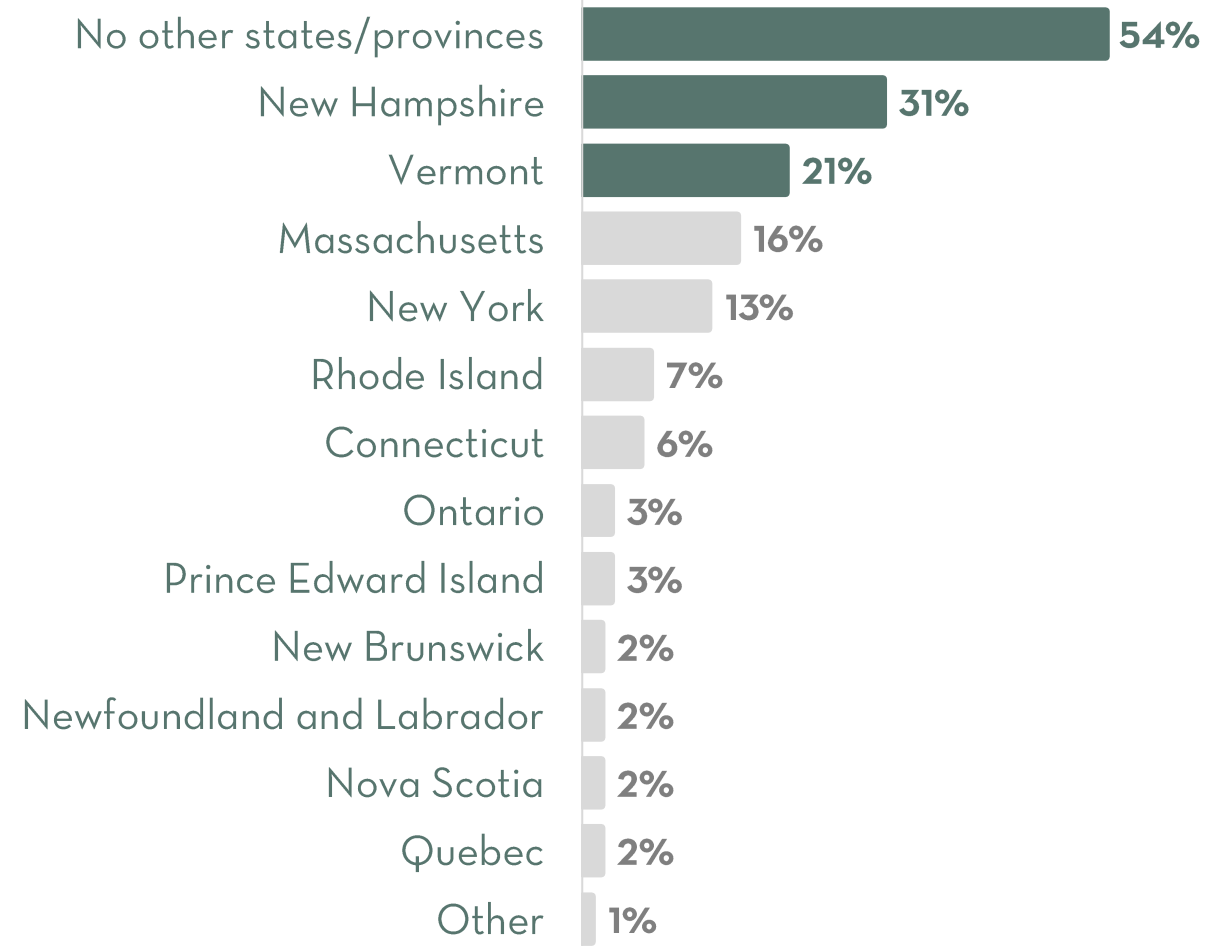
- » **1 in 3** visitors traveled to Maine Lakes & Mountains to go sightseeing/touring
- » About **1 in 4** visitors came to Maine Lakes & Mountains to relax and unwind or for nature & birdwatching
- » Over **1 in 5** visitors traveled to Maine Lakes & Mountains to visit friends and relatives



*Multiple responses permitted.

OTHER STATES & PROVINCES CONSIDERED*

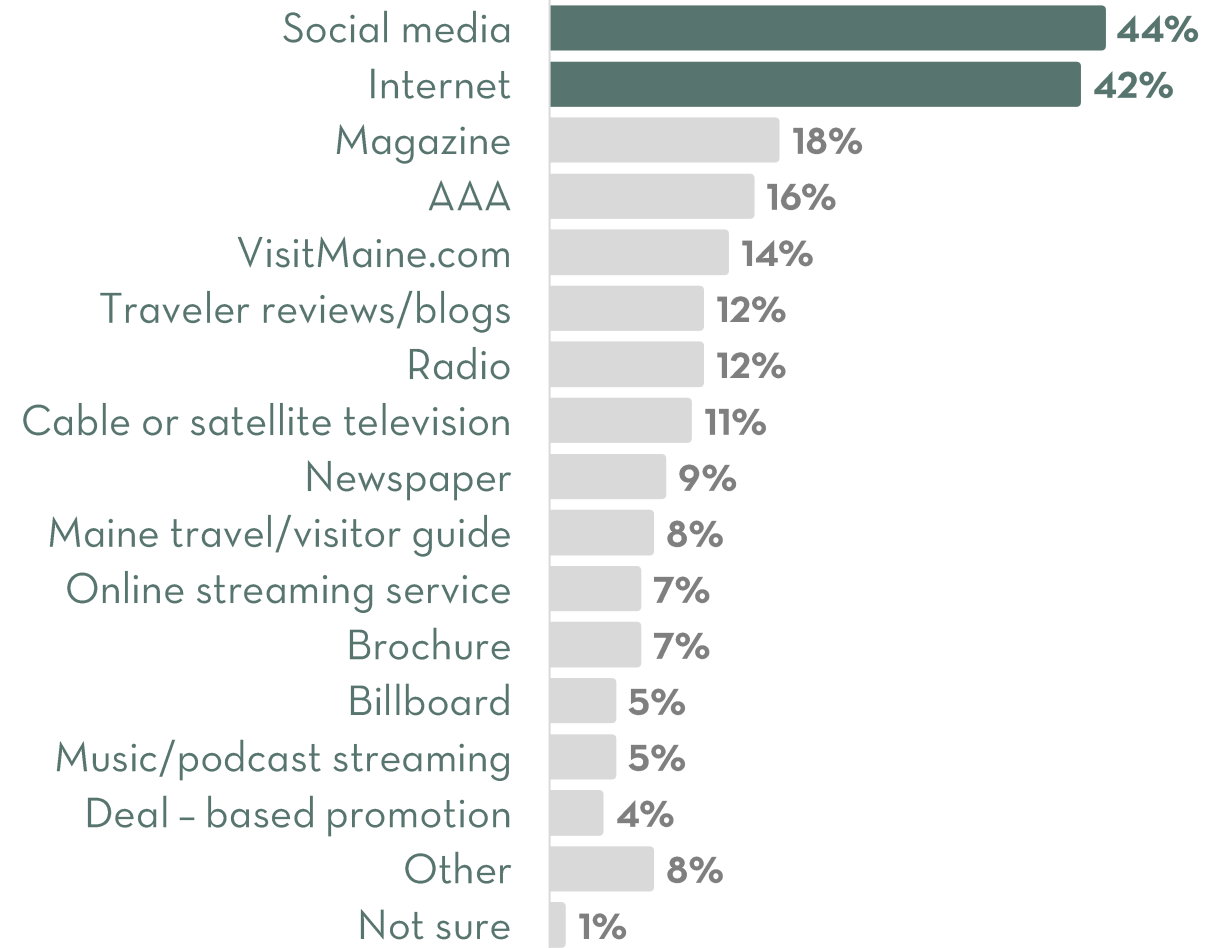
- » **54%** (-6% points from 2021) of visitors considered visiting **only** Maine while planning their trips to Maine Lakes & Mountains
- » Visitors to Maine Lakes & Mountains were **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces



*Multiple responses permitted.

PRE-TRIP RECALL OF ADVERTISING*

- » **49%** (+1% points from 2021) of visitors noticed advertising or promotions for Maine prior to their trip to Maine Lakes & Mountains
- » Visitors who recalled this advertising primarily saw it on **social media** (+8% points from 2021) or the **internet** (+7% points from 2021)
- » This information influenced **32%** of all Maine Lakes & Mountains visitors to visit Maine

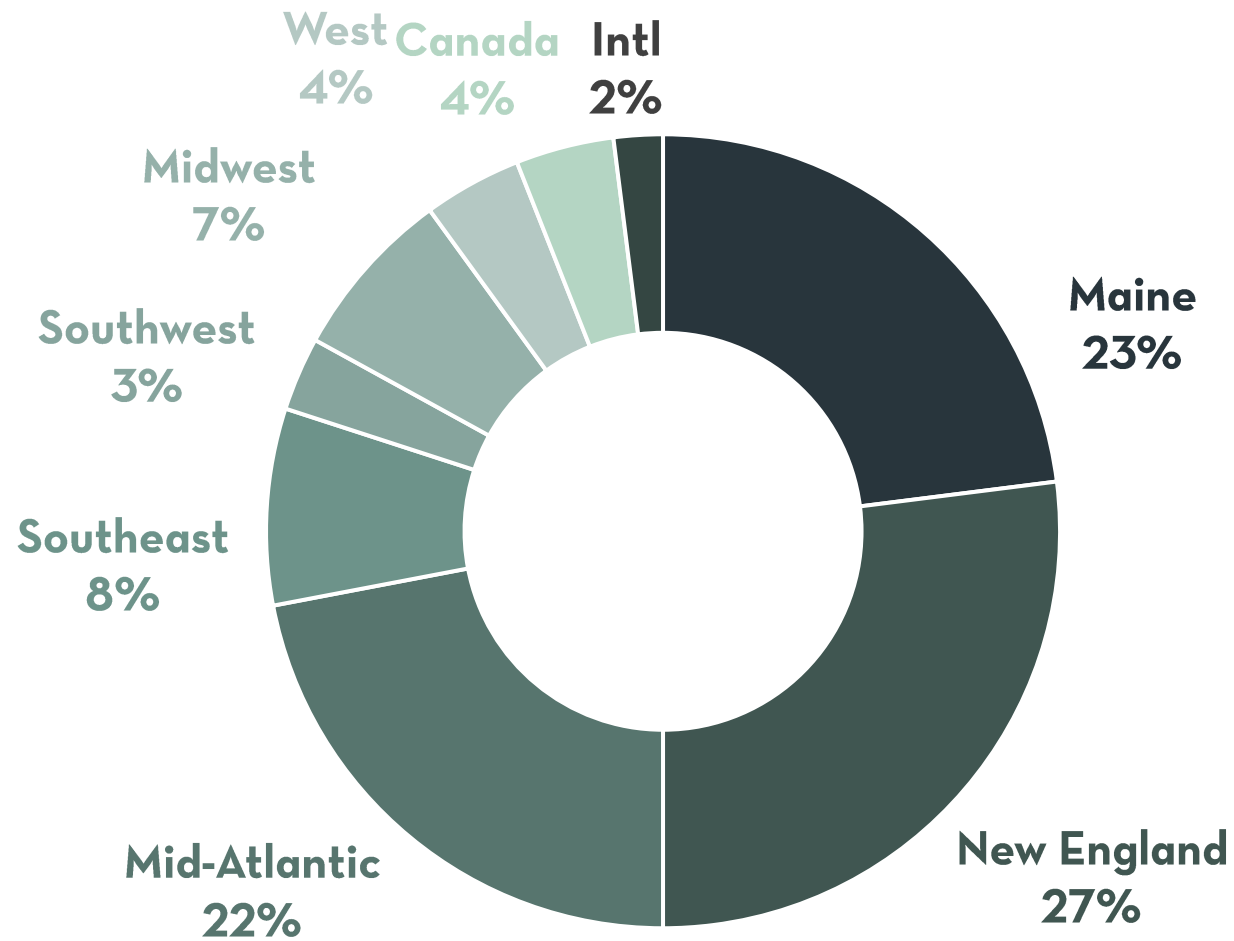


*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **80%** of visitors to Maine Lakes & Mountains were from 13 U.S. states and Ontario
- » **23%** of visitors were residents of Maine traveling throughout the state

State	Percent
Maine	23%
Massachusetts	12%
New York	10%
New Hampshire	7%
Pennsylvania	5%
Connecticut	4%
Florida	4%
New Jersey	3%
Vermont	3%
Ontario	3%
Ohio	2%
Texas	2%
Virginia	2%

TOP ORIGIN MARKETS

- » **35%** of visitors to Maine Lakes & Mountains traveled from **8** U.S. markets
- » **9%** of visitors traveled to Maine Lakes & Mountains from New York City or Boston

Market	Percent
New York City ¹	9%
Boston	9%
Philadelphia	4%
Portland	4%
Washington DC - Baltimore ²	3%
Auburn - Lewiston	2%
Augusta	2%
Brockton, MA	2%

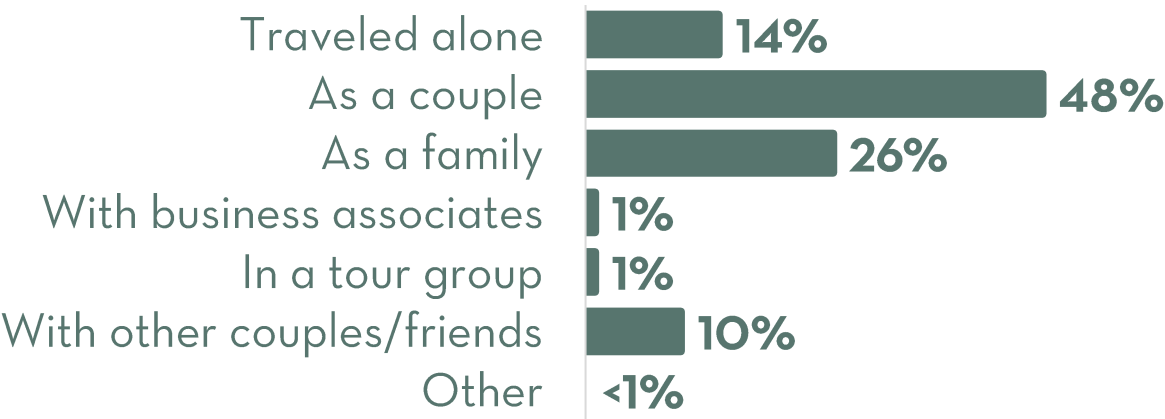
¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

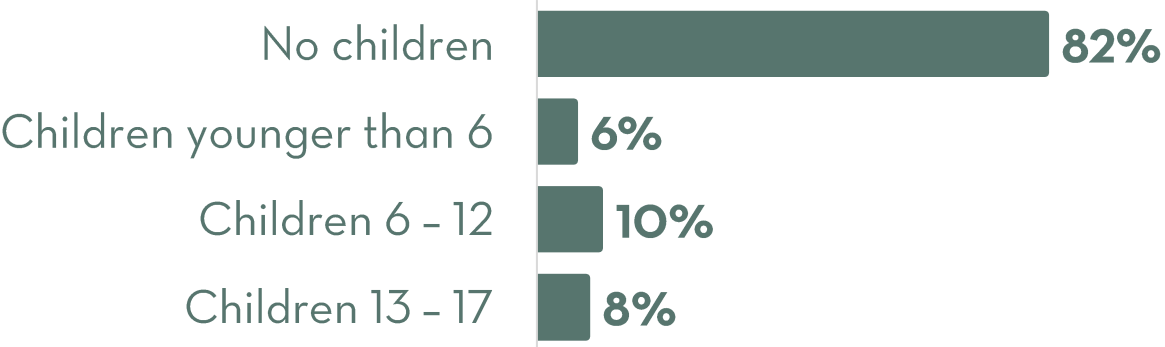
TRAVEL PARTIES

- » Typical visitors traveled to Maine Lakes & Mountains in parties of **2.8** people
- » Nearly **half** of visitors traveled as a couple
- » **18%** of visitors traveled with one or more children under 18 in their travel party

Travel Party Composition



Children in Travel Party*



*Multiple responses permitted.

GENDER

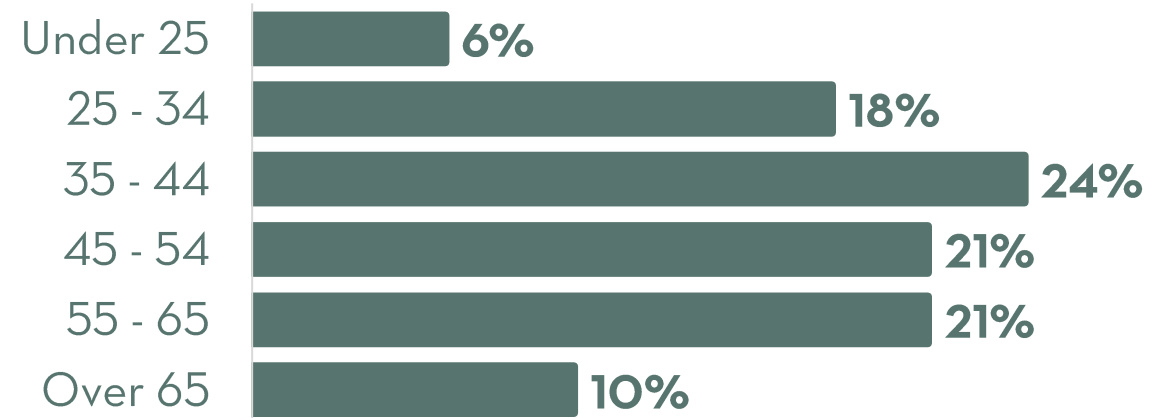
- » Over **53%** of visitors to Maine Lakes & Mountains interviewed were females



*Of visitors interviewed.

AGE

- » The average age of visitors to Maine Lakes & Mountains is **46** years old



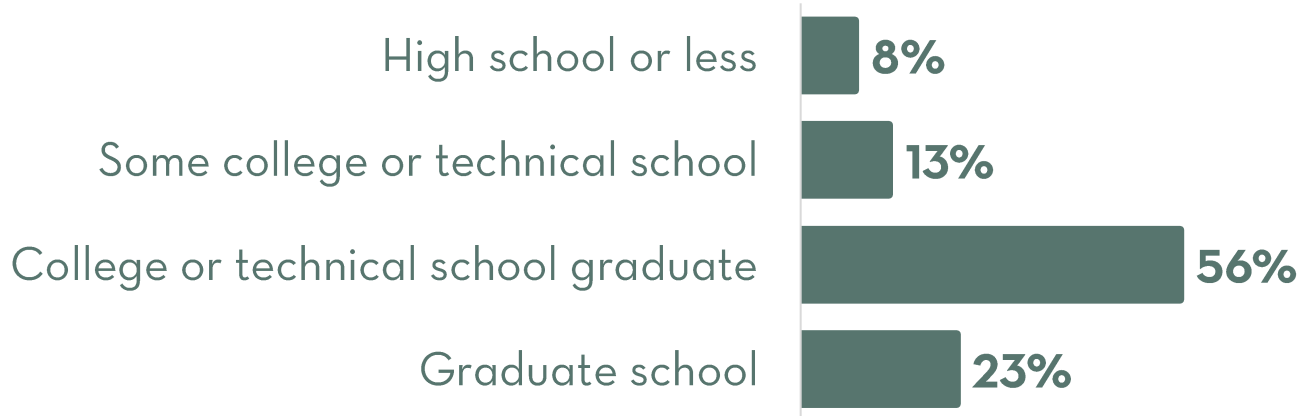
RACE & ETHNICITY

- » Nearly **9 in 10** visitors to Maine Lakes & Mountains were white (-2% from 2021)



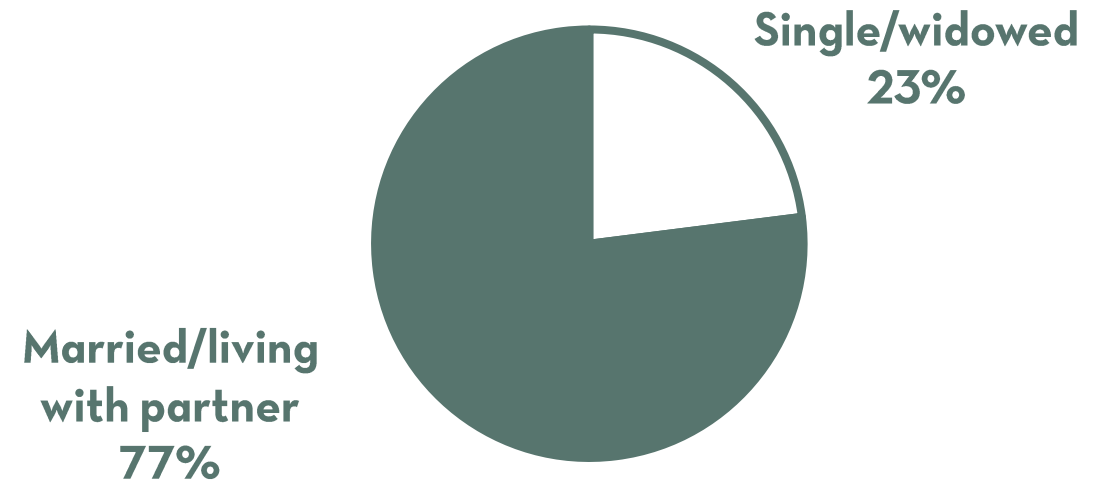
EDUCATIONAL ATTAINMENT

- » Nearly **4 in 5** visitors to Maine Lakes & Mountains have a college/technical school degree or higher



MARITAL STATUS

» Over **3 in 4** visitors to Maine Lakes & Mountains were married or living with their partner



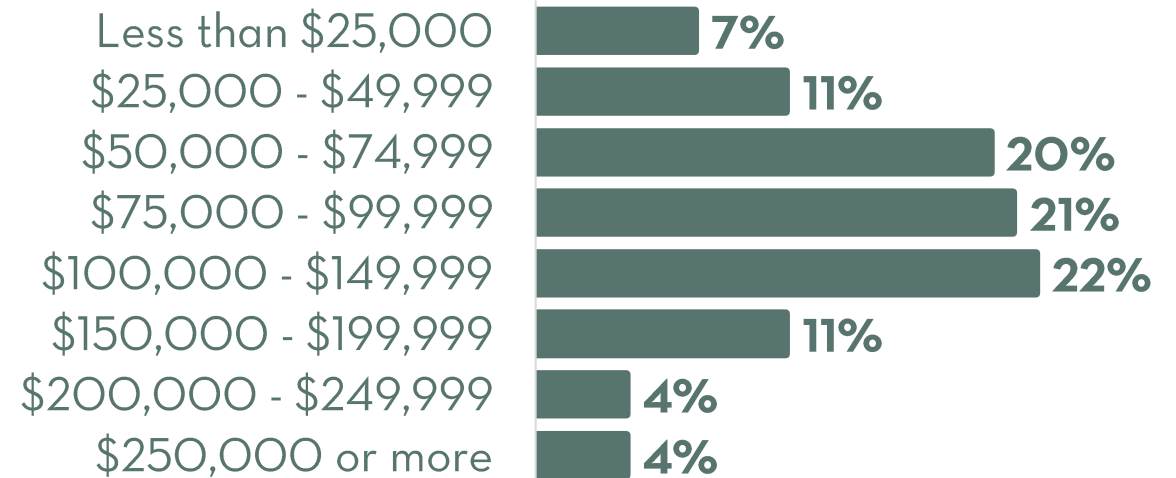
EMPLOYMENT STATUS

» Over **3 in 5** visitors to Maine Lakes & Mountains were employed full-time and part-time



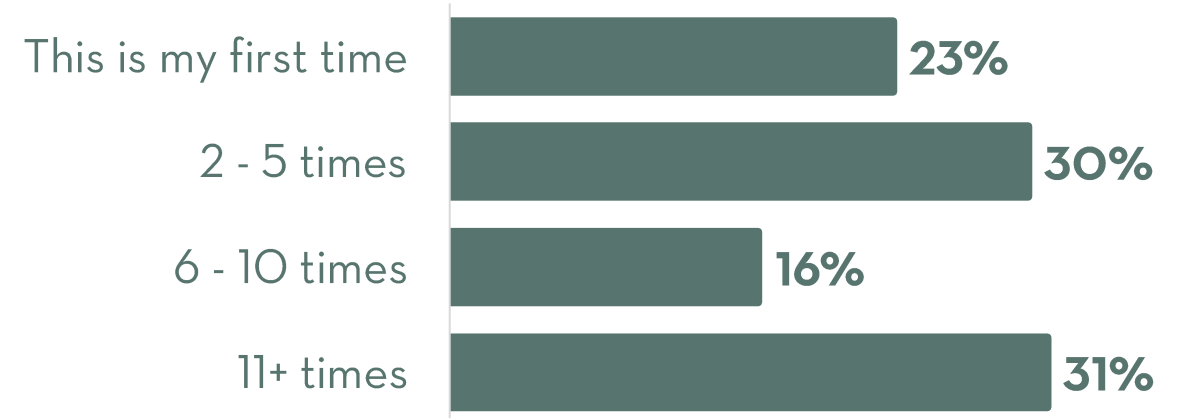
HOUSEHOLD INCOME

- » The average household income of visitors to Maine Lakes & Mountains is **\$89,300** per year
- » **19%** of visitors to Maine Lakes & Mountains earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » **23%** of visitors to Maine Lakes & Mountains were traveling in Maine for the first time
- » **31%** of visitors to Maine Lakes & Mountains had previously traveled in Maine more than 10 times



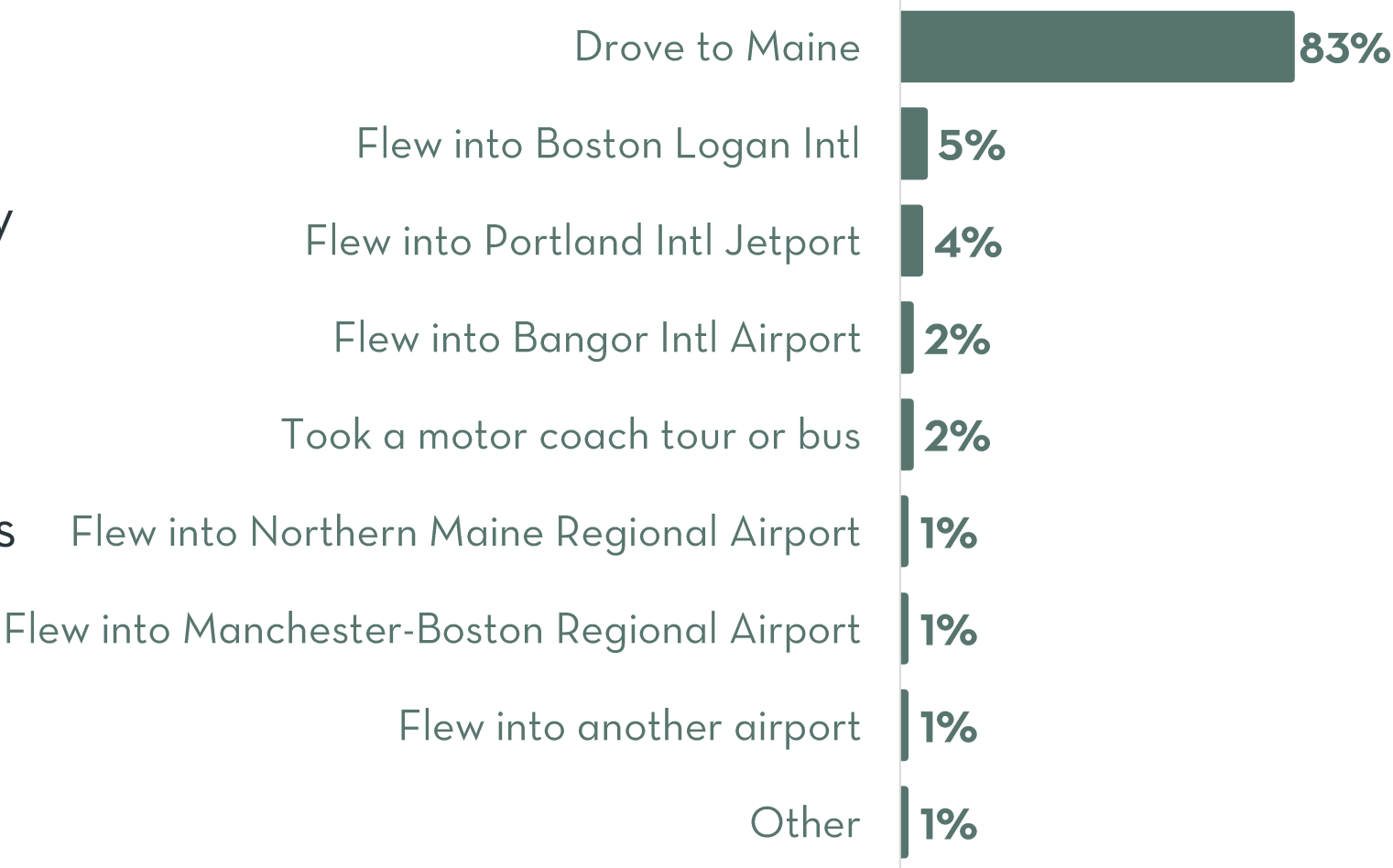
TRIP PLANNING CYCLE : TRIP EXPERIENCE



MODES OF TRANSPORTATION

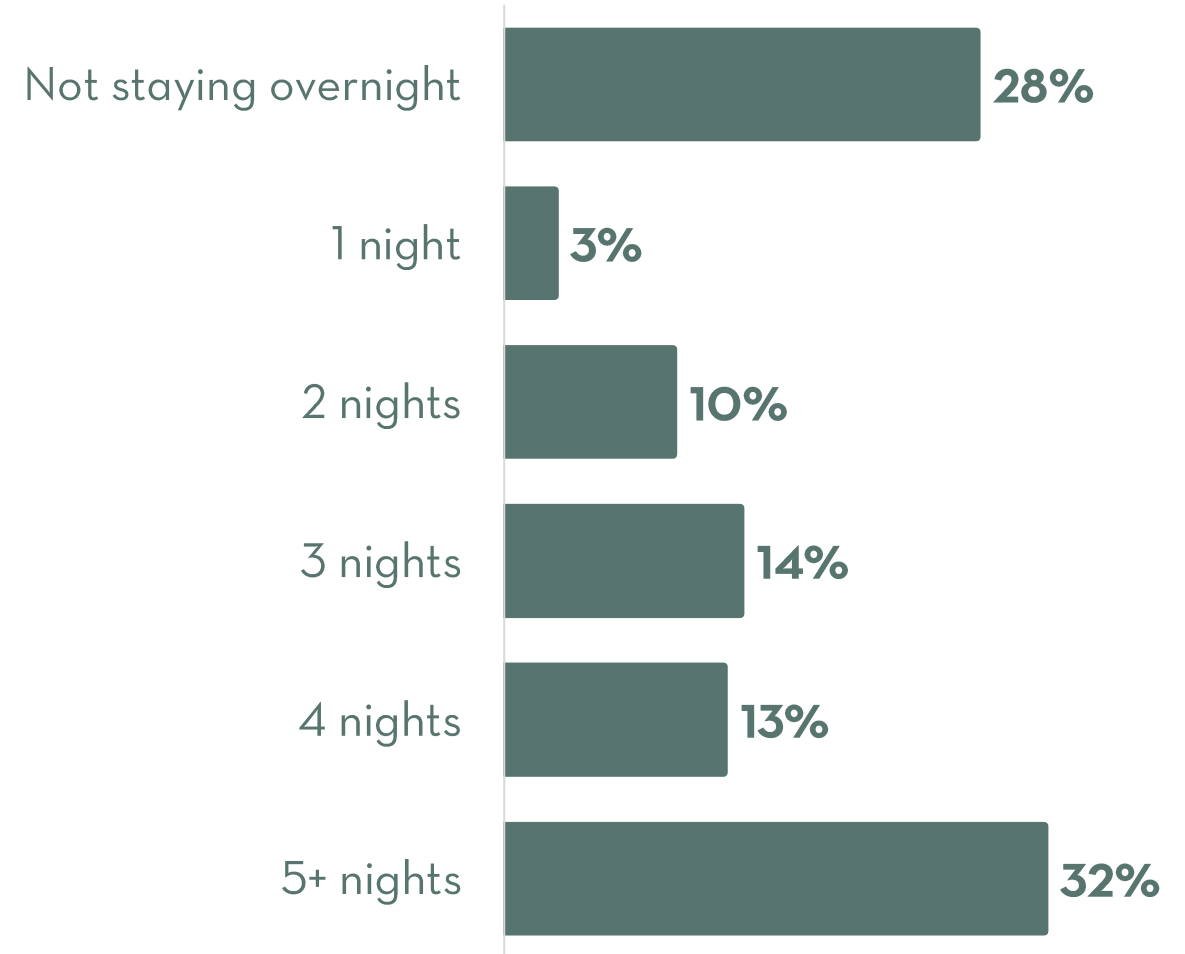
» Maine Lakes & Mountains is a drive-market for most visitors, with **83%** choosing to travel by car over plane, motor coach/bus, or train

» Most Maine Lakes & Mountains visitors who flew to Maine arrived at Boston Logan International Airport or Portland International Jetport



NIGHTS STAYED

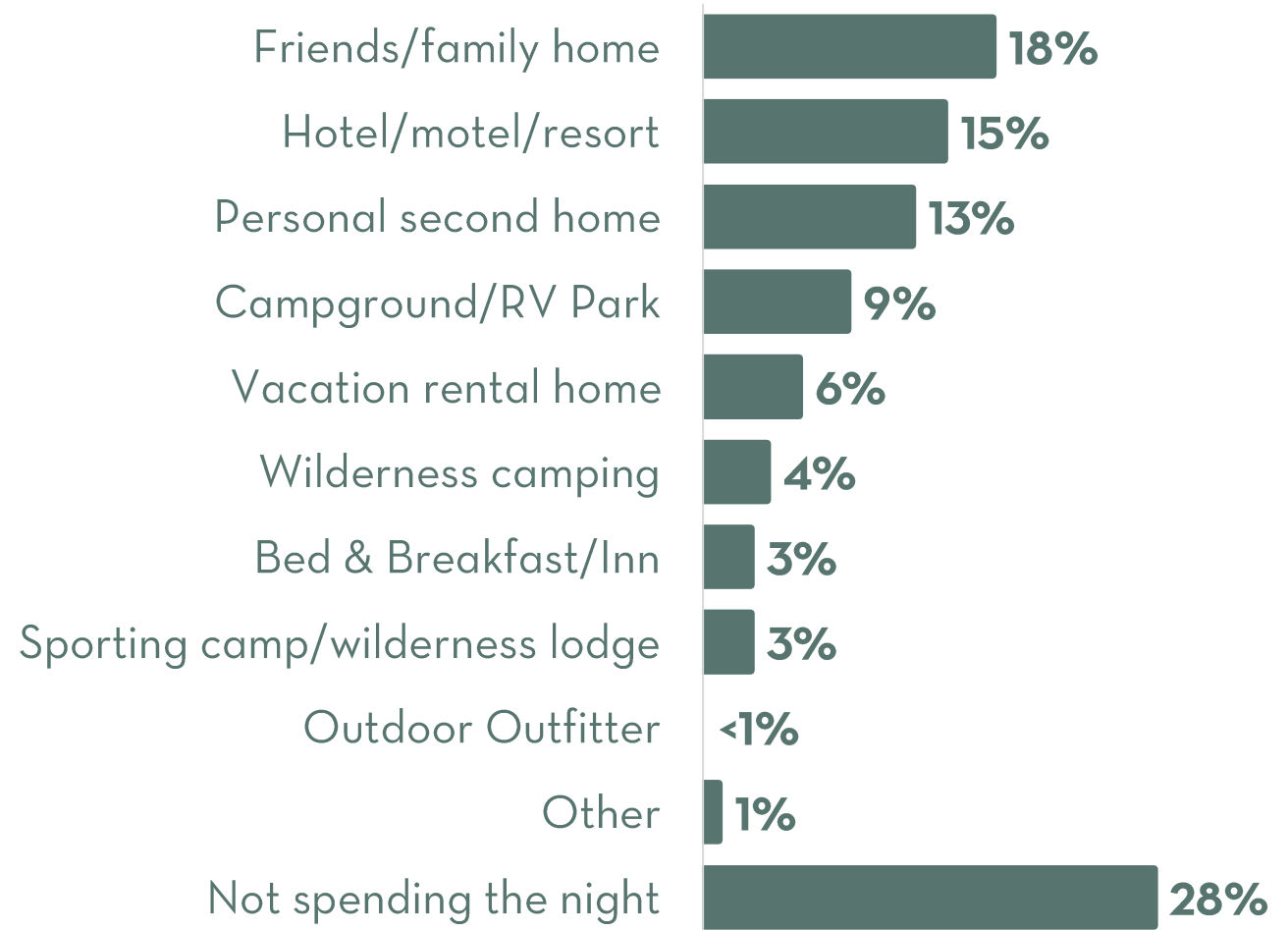
- » **72%** of visitors to Maine Lakes & Mountains stayed one or more nights in Maine on their trip
- » Typical visitors stayed **4.6*** nights in Maine Lakes & Mountains on their trips
- » Typical visitors to Maine Lakes & Mountains staying overnight in paid accommodations stayed **5.7** nights in Maine on their trips



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

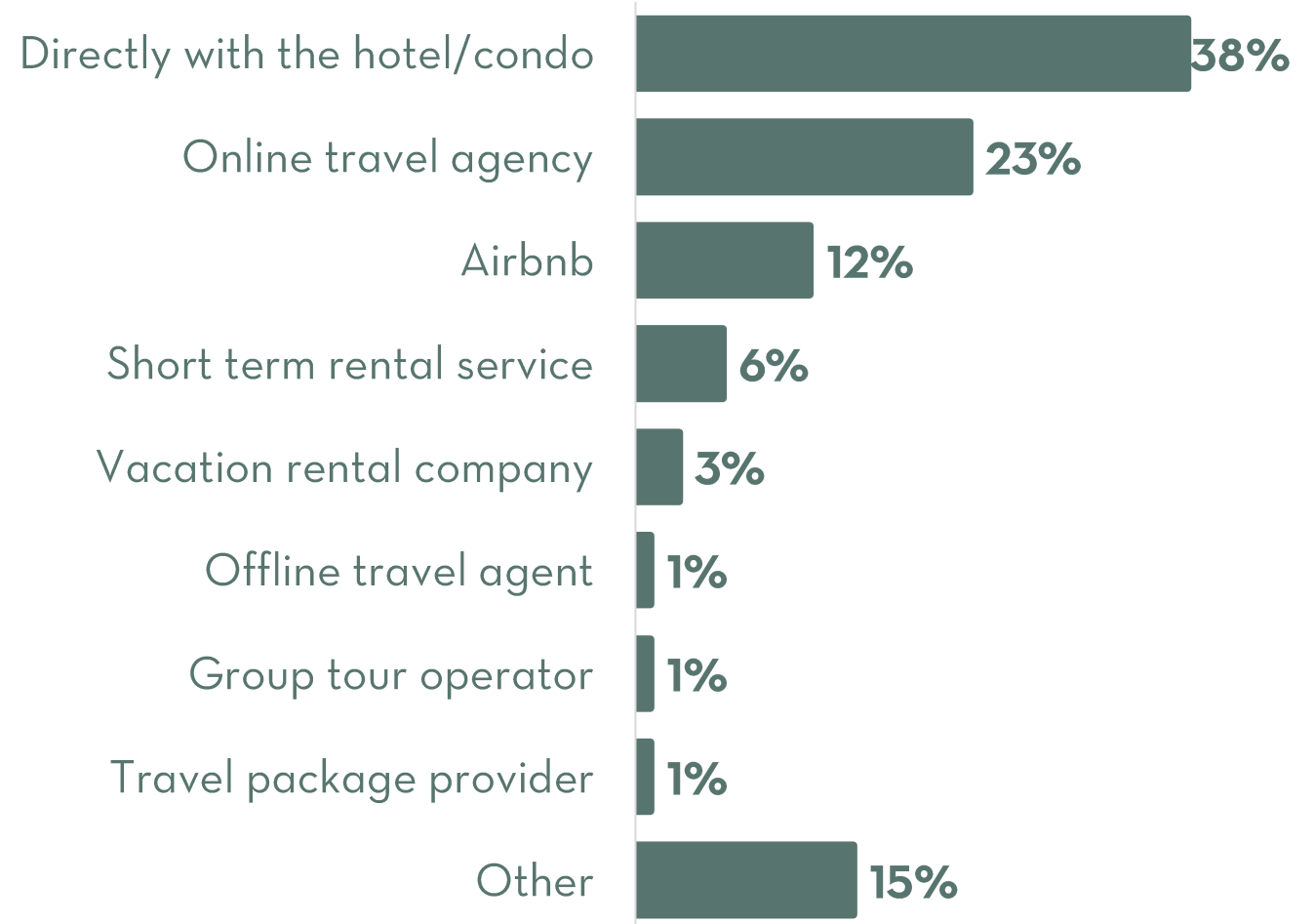
ACCOMMODATIONS

- » About **1 in 5** visitors to Maine Lakes & Mountains stayed with friends and relatives
- » Over **1 in 7** visitors stayed in a hotel/motel/resort on their trip to Maine Lakes & Mountains



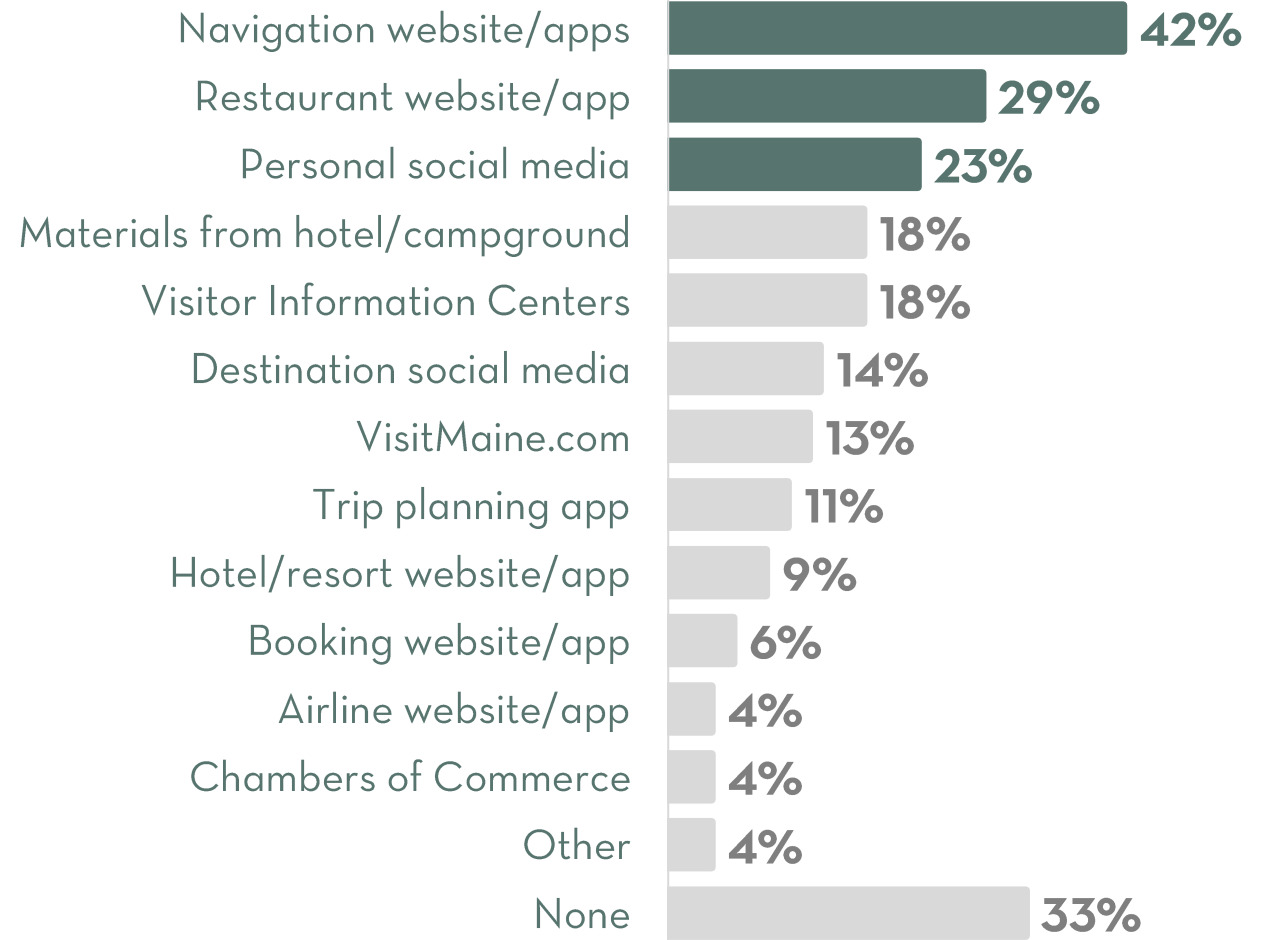
BOOKING METHODS

- » Nearly **2 in 5** visitors to Maine Lakes & Mountains who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



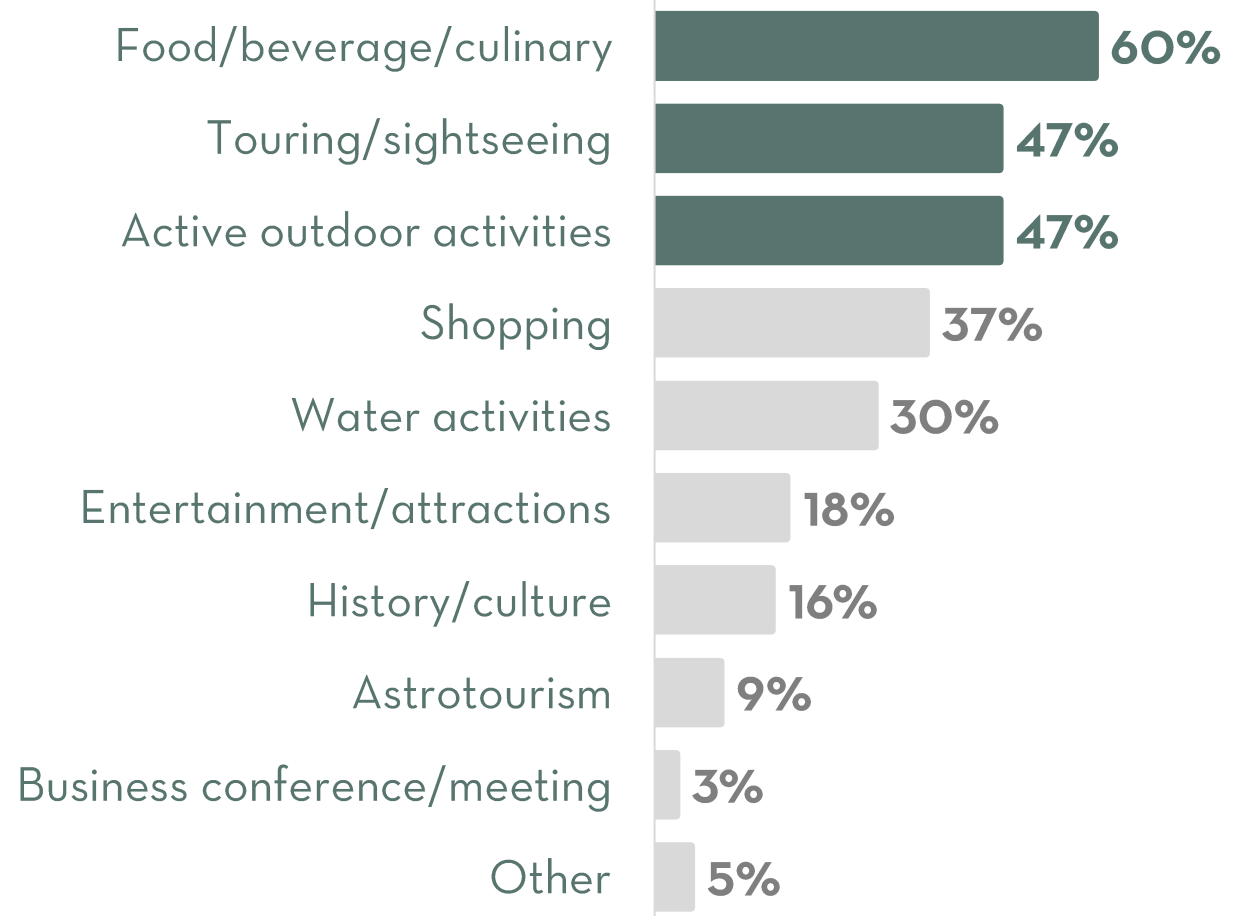
IN-MARKET VISITOR RESOURCES*

- » Visitors were more likely to rely on **navigation websites/apps** to plan activities in-market
- » About **3 in 10** visitors used a restaurant website or app
- » **1 in 3** visitors did not use any resources to plan activities while they were in Maine Lakes & Mountains

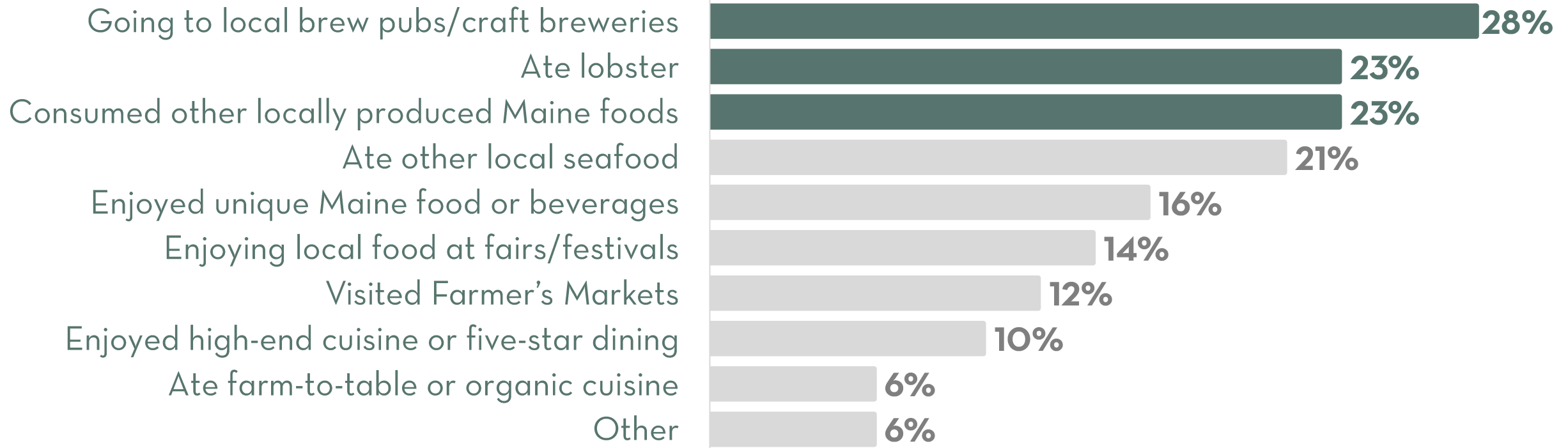


VISITOR ACTIVITIES*

- » **3 in 5** visitors engaged in food/beverage/culinary activities during their trip to Maine Lakes & Mountains
- » Nearly **half** of visitors went touring/sightseeing or participated in active outdoor activities during their trip to Maine Lakes & Mountains

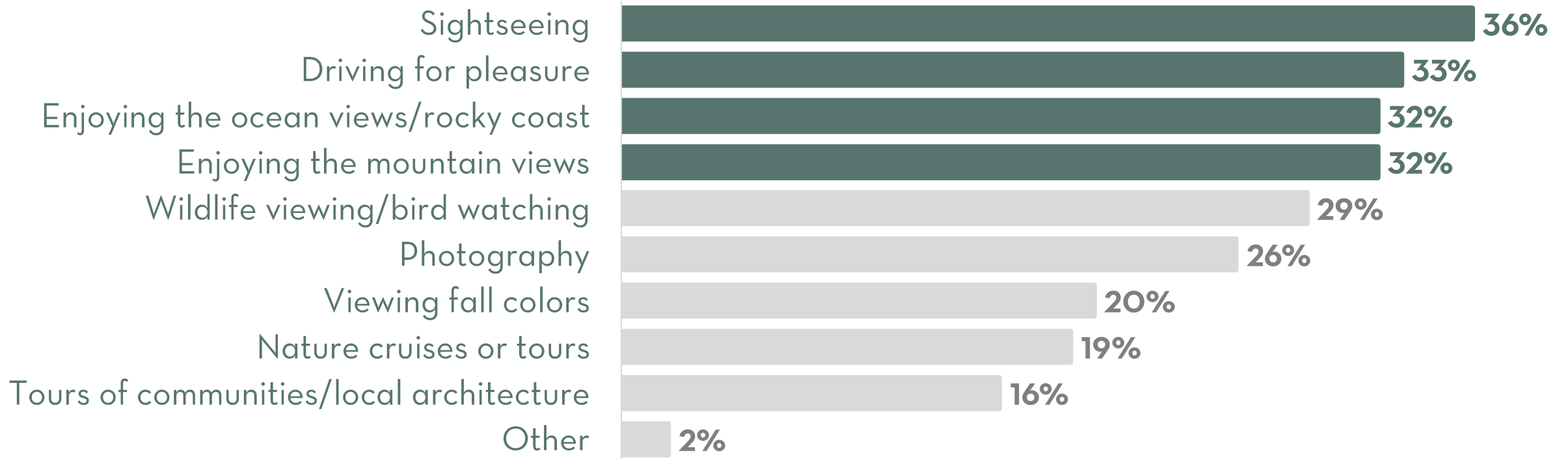


FOOD & BEVERAGE ACTIVITIES*

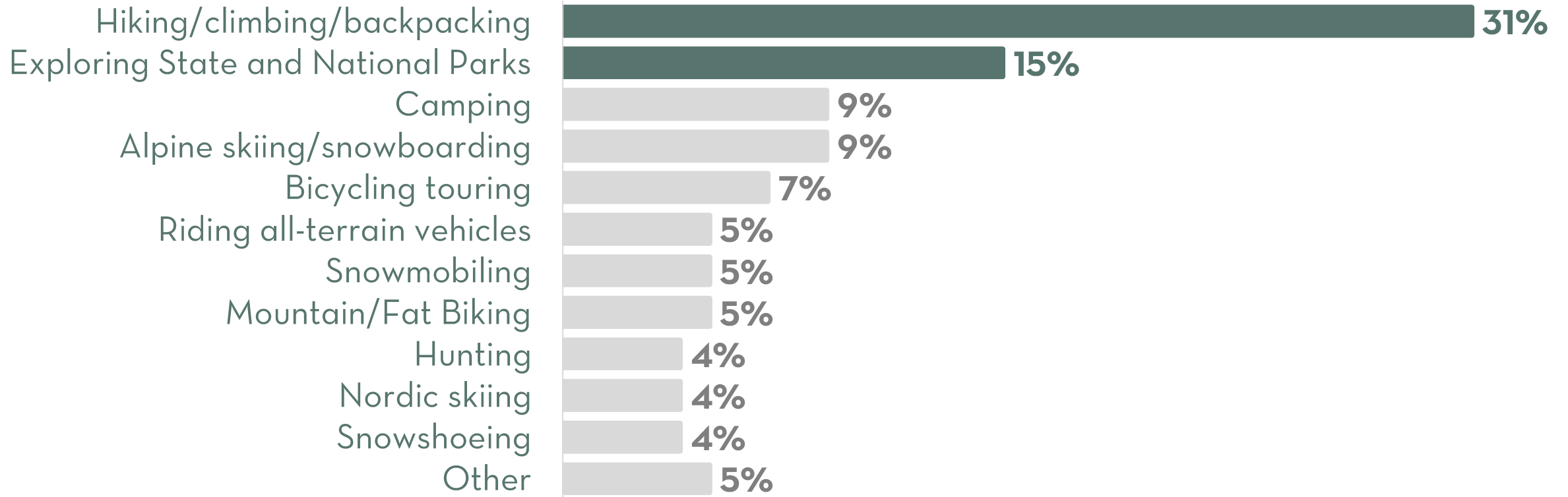


*Multiple responses permitted.

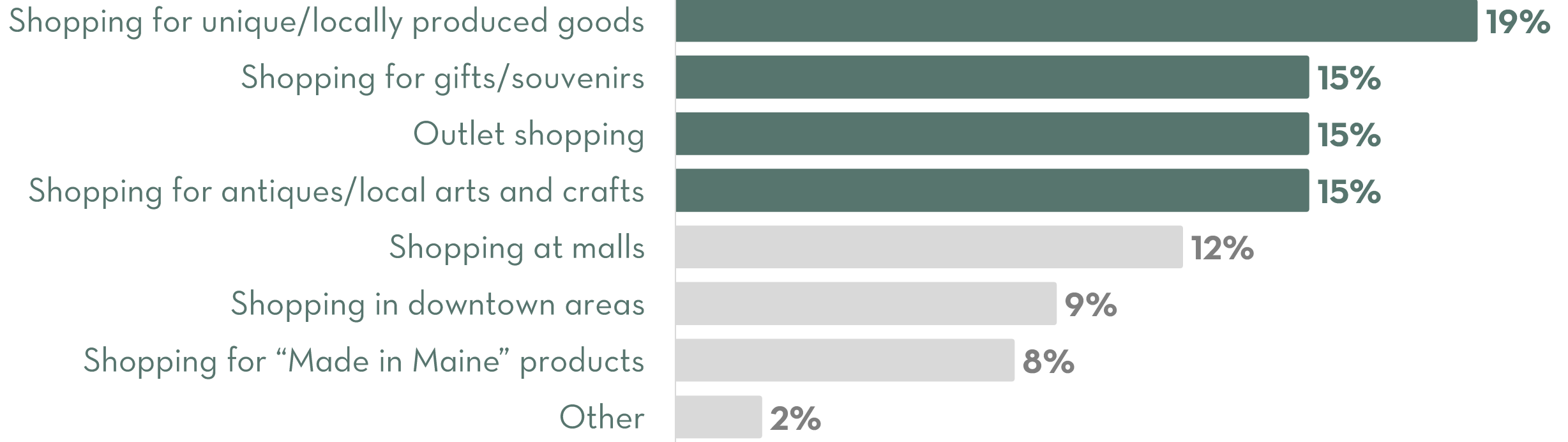
TOURING & SIGHTSEEING ACTIVITIES*



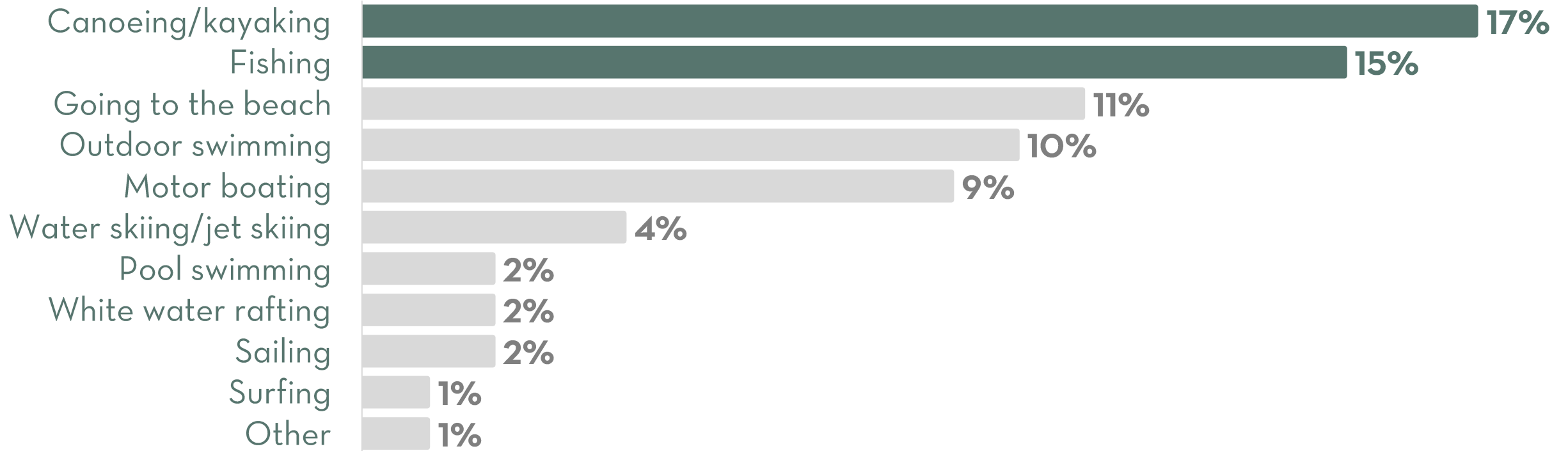
ACTIVE OUTDOOR ACTIVITIES*



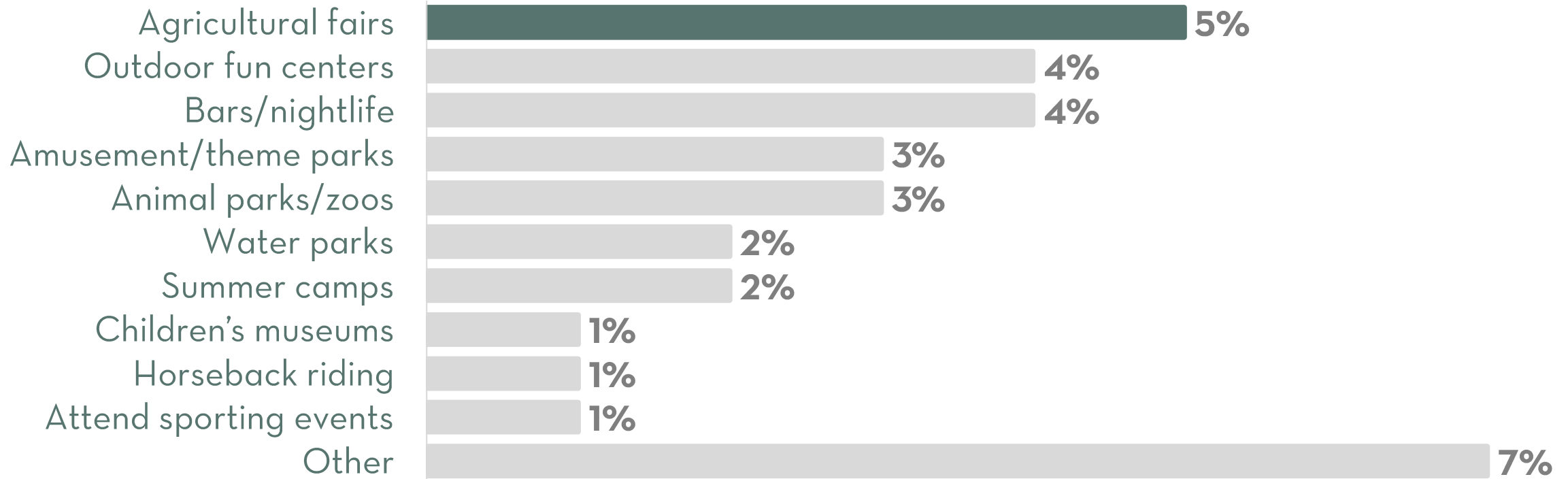
SHOPPING ACTIVITIES*



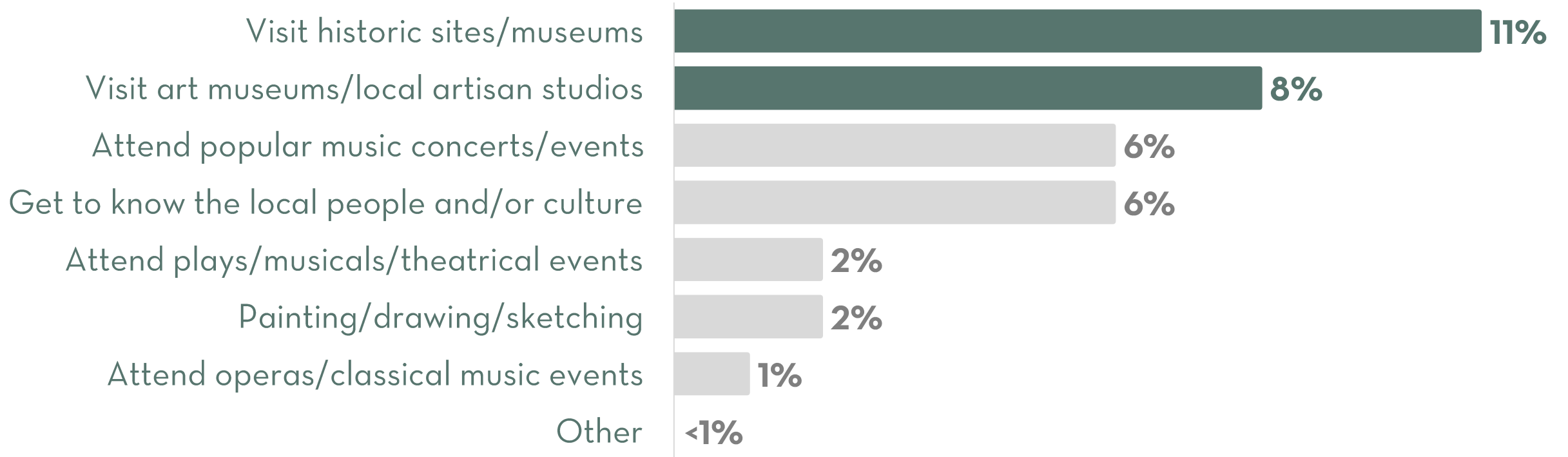
WATER ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

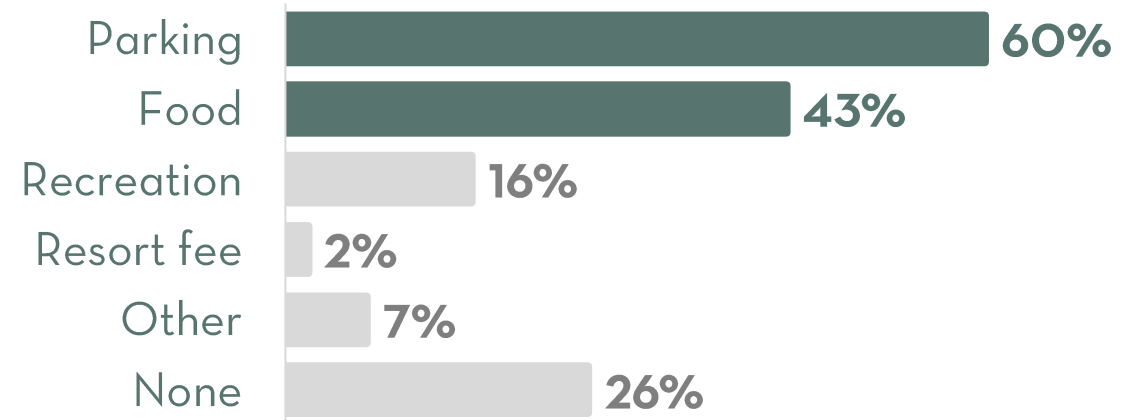
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$230	\$0	\$0
Restaurants	\$49	\$38	\$43
Groceries	\$38	\$40	\$14
Shopping	\$97	\$62	\$41
Activities & attractions	\$73	\$63	\$57
Transportation	\$93	\$62	\$26
Other	\$34	\$21	\$10
Daily Spending	\$614	\$286	\$191

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,519	\$0	\$0
Restaurants	\$325	\$254	\$43
Groceries	\$347	\$265	\$14
Shopping	\$649	\$423	\$41
Activities & attractions	\$468	\$405	\$57
Transportation	\$597	\$405	\$26
Other	\$209	\$134	\$10
Trip Spending	\$4,014	\$1,886	\$191

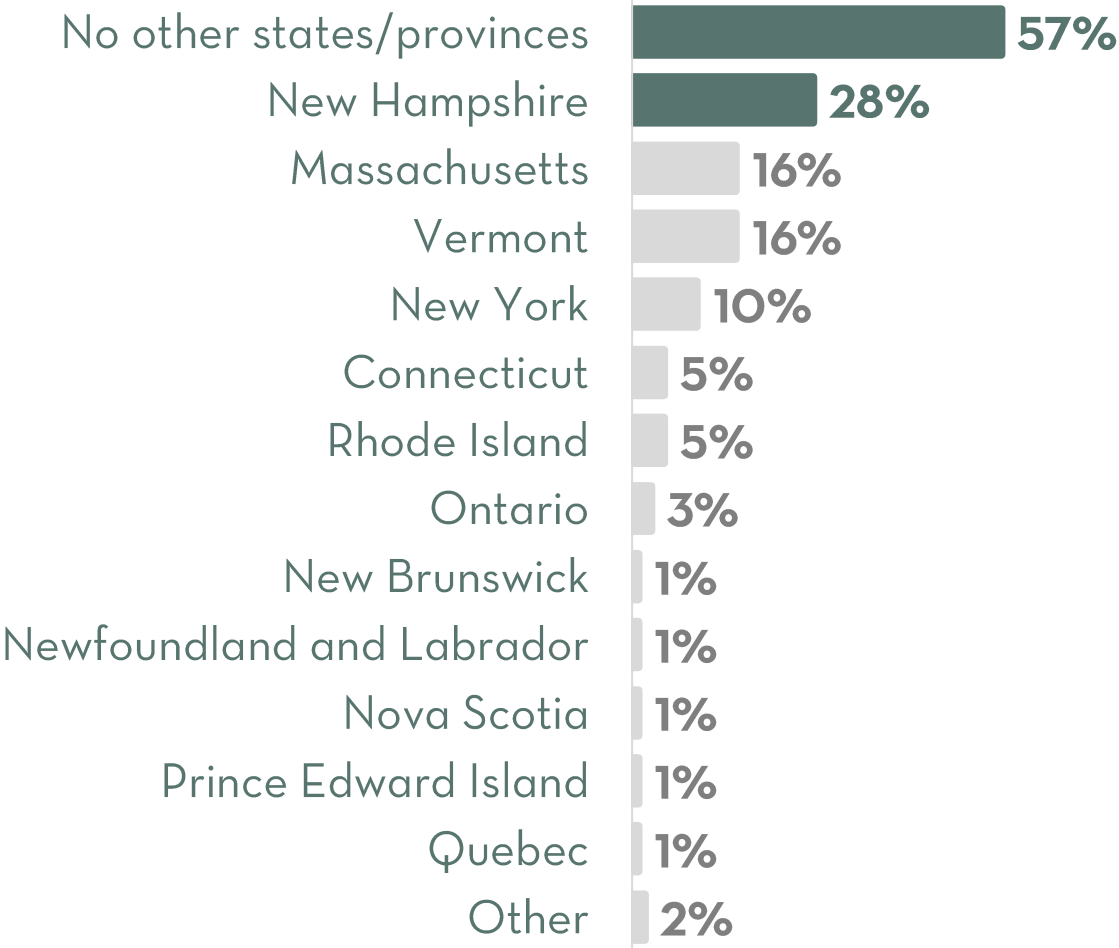
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc. was included in the room price for over **7 in 10** visitors
- » Price for accommodations included parking for **3 in 5** visitors
- » Food was included in accommodations' pricing for over **2 in 5** visitors



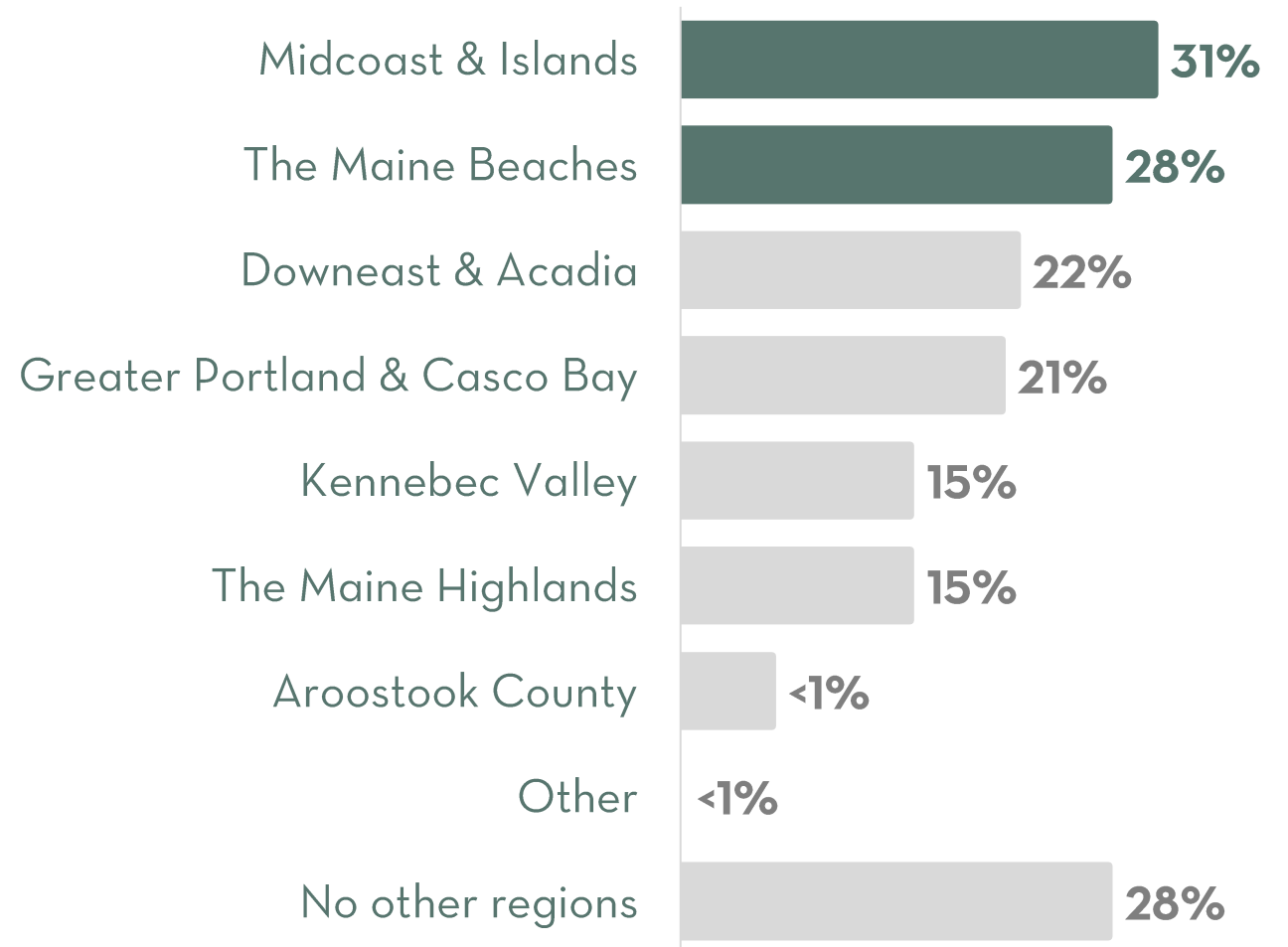
OTHER STATES & PROVINCES VISITED*

- » Nearly **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 Lakes & Mountains than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE*

- » Nearly **3 in 10** visitors stayed within Maine Lakes & Mountains during their trip in Maine, rather than traveling throughout the state
- » **3 in 10** visitors to Maine Lakes & Mountains traveled to the Midcoast & Islands during their trip in Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION

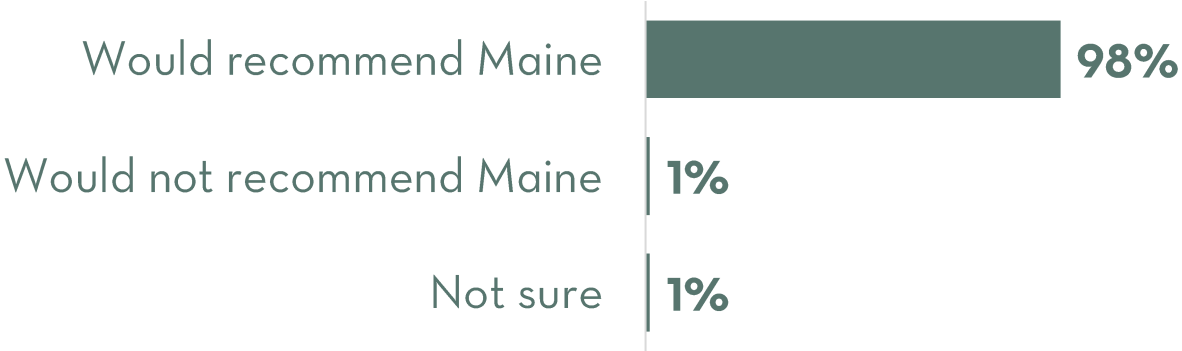


RECOMMENDING MAINE & ITS REGIONS

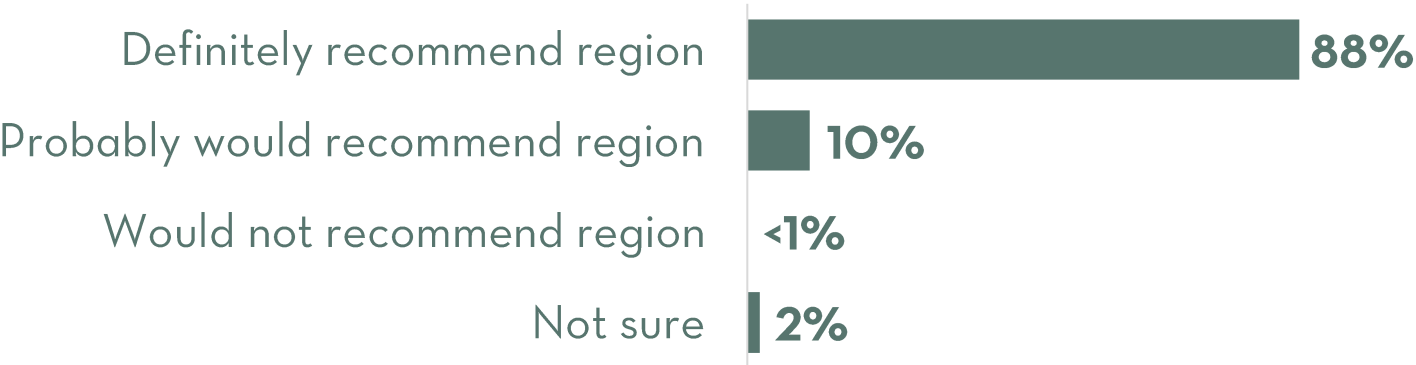
» **98%** of visitors to Maine Lakes & Mountains would recommend that their friends and family choose Maine as their destination for a future visit or vacation

» **98%** of visitors would recommend that their friends and family visit Maine Lakes & Mountains – **88%** would definitely recommend

Likelihood of Recommending Maine

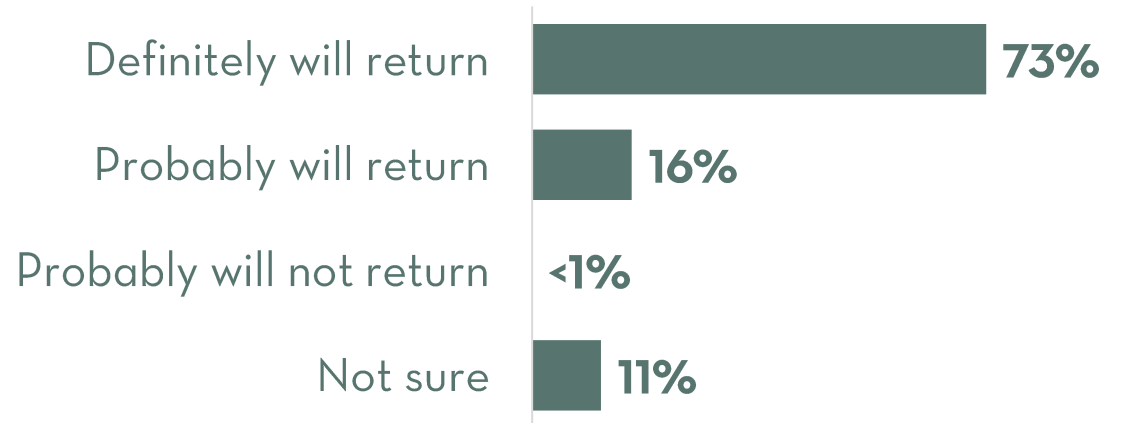


Likelihood of Recommending Region Visited



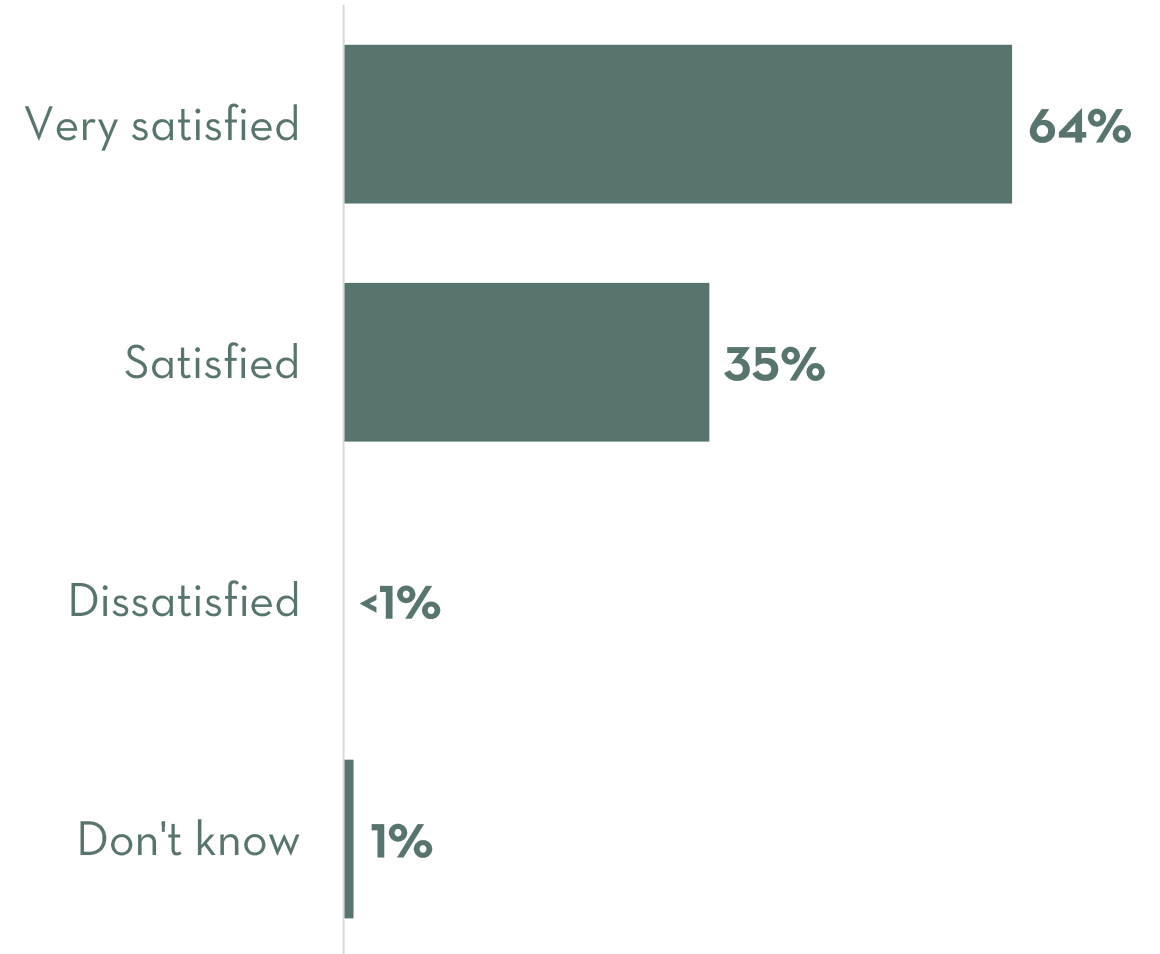
LIKELIHOOD OF RETURNING TO MAINE

- » **89%** of visitors to Maine Lakes & Mountains will return to Maine for a future visit or vacation

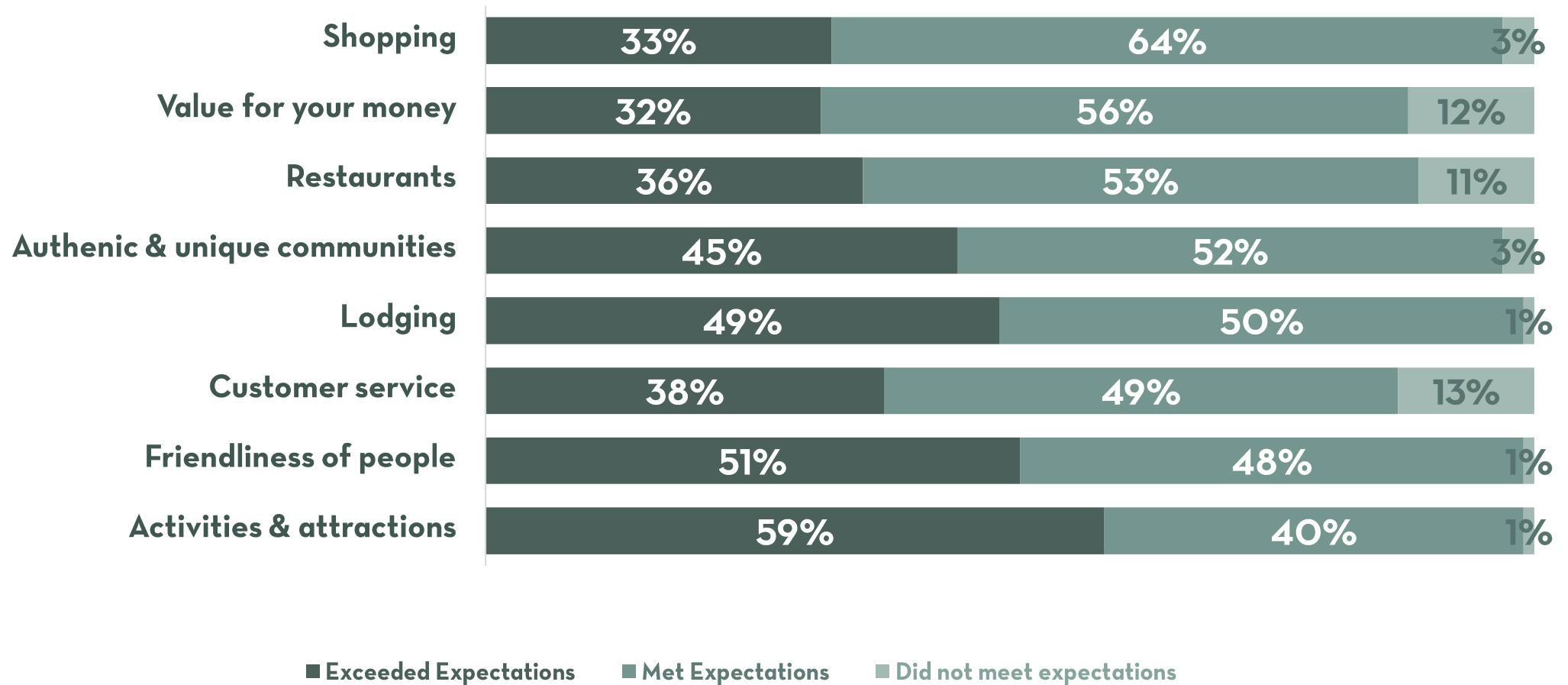


SATISFACTION

- » **99%** of visitors to Maine Lakes & Mountains were satisfied with their trip to Maine
- » Over **3 in 5** visitors were very satisfied with their trip to Maine

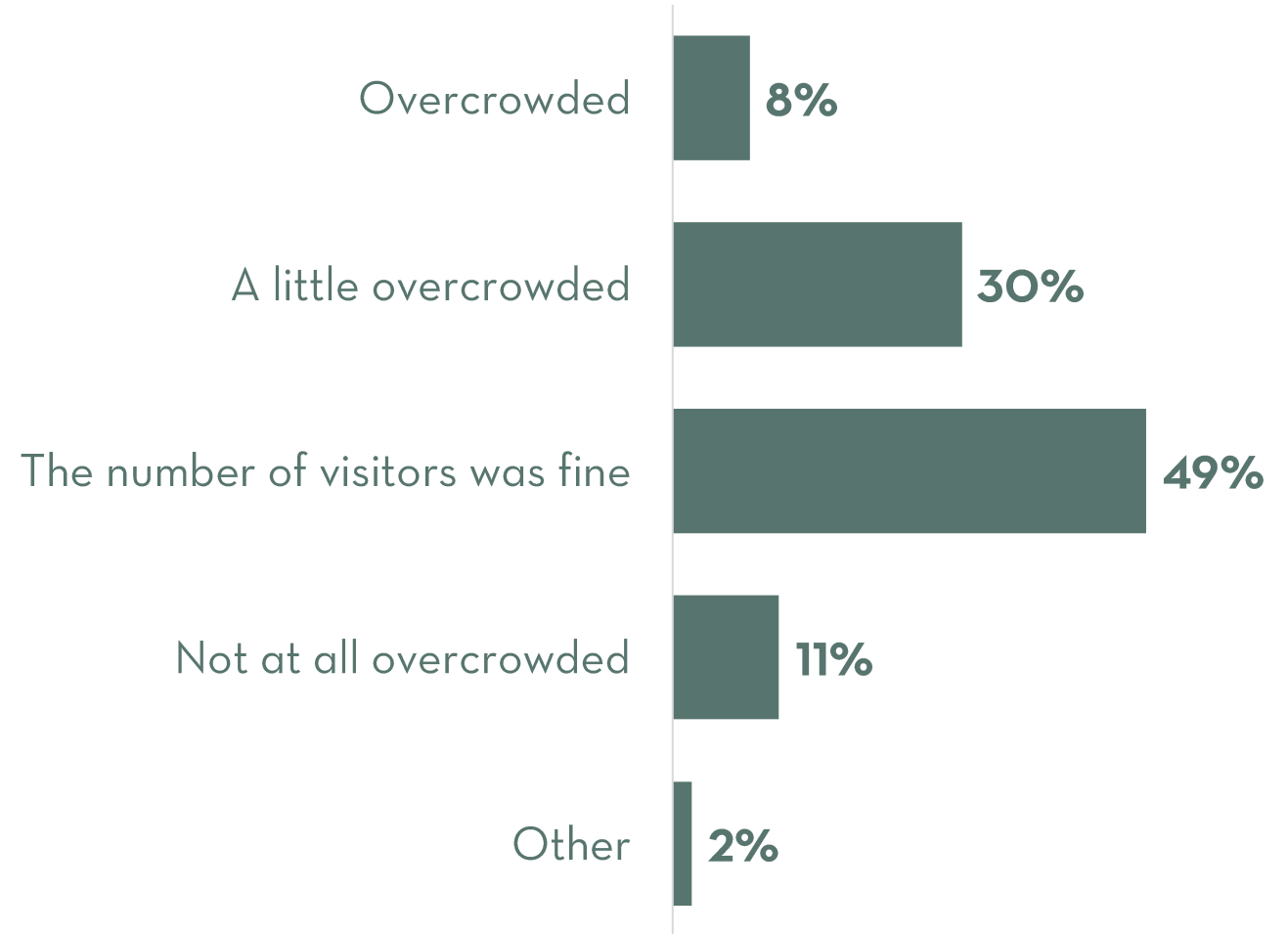


TRIP EXPECTATIONS



OVERCROWDING

- » **49%** of visitors to Maine Lakes & Mountains thought the number of visitors during their trip was fine
- » **30%** 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	23%	17%
2 - 3 weeks	17%	14%
1 - 2 months	23%	25%
3 - 4 months	14%	15%
5 - 6 months	8%	12%
7 months - 1 year	7%	12%
More than 1 year	8%	5%
Days in Planning Cycle	43	53

Booking Window	2021	2022
A week or less	29%	21%
2 - 3 weeks	19%	15%
1 - 2 months	21%	25%
3 - 4 months	13%	15%
5 - 6 months	7%	11%
7 months - 1 year	7%	10%
More than 1 year	4%	3%
Days in Booking Window	33	47

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2021	2022
Online search engines	29%	35%
VisitMaine.com	14%	21%
Traveler reviews/blogs/stories	13%	16%
Hotel websites	13%	14%
TripAdvisor	11%	13%
MaineLakesandMountains.com	7%	12%
Facebook	11%	11%
Instagram	10%	11%
YouTube	11%	11%
Online travel agency	12%	11%
Visit Maine social media	10%	10%
Airbnb	9%	9%
MaineTourism.com	12%	8%
DowneastAcadia.com	4%	6%
VRBO/HomeAway	6%	5%
Vacation rental websites	5%	5%
DiscoverNewEngland.com	5%	5%
TheMaineBeaches.com	5%	5%
Airline websites	7%	4%
KennebecValley.org	2%	3%
MainesMidCoast.com	4%	3%
Twitter	6%	3%
TheMaineHighlands.com	3%	2%
VisitPortland.com	3%	2%
VisitBarHarbor.com	2%	2%
VisitAroostook.com	2%	1%
Other	11%	9%
None	32%	27%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2021	2022
Advice from friends/family	30%	38%
Articles or travelogues	15%	23%
AAA	14%	22%
Travel planning apps	9%	13%
Travel guides/brochures	13%	10%
Called the Maine Office of Tourism	7%	7%
Travel books & magazines	12%	7%
Visitor Guide	6%	5%
Visit Maine e-newsletter	5%	5%
Called local convention and visitors bureaus	5%	3%
Called local Chambers of Commerce	3%	3%
Called another Maine Tourism/Lodging Association	4%	3%
Travel agent	6%	3%
Other	7%	6%
None	44%	37%

REASON FOR VISITING*

Reasons for Visiting	2021	2022
Sightseeing/touring	26%	33%
Relax and unwind	33%	27%
Nature & bird watching	23%	25%
Visiting friends/relatives	24%	21%
Active outdoor activities	12%	13%
Water activities	8%	9%
Special occasion	8%	8%
Attractions	6%	8%
Snow activities	9%	8%
Special event	4%	7%
Beach	10%	6%
Shopping	6%	6%
Conference/meeting	3%	4%
Culture/museums/history	6%	4%
Sporting event	1%	1%
Astrotourism	1%	1%
Other	10%	10%

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2021	2022
No other states/provinces	60%	54%
New Hampshire	23%	31%
Vermont	16%	21%
Massachusetts	11%	16%
New York	12%	13%
Rhode Island	5%	7%
Connecticut	4%	6%
Ontario	3%	3%
Prince Edward Island	3%	3%
New Brunswick	2%	2%
Newfoundland and Labrador	2%	2%
Nova Scotia	3%	2%
Quebec	3%	2%
Other	3%	1%

ADVERTISING/PROMOTIONS

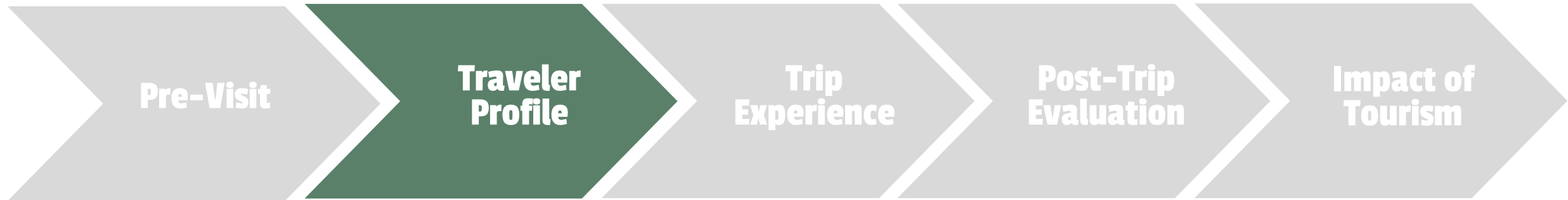
Recalled Advertising	2021	2022
Yes	48%	49%
No	33%	37%
Not sure	19%	14%

Influenced by Advertising	2021	2022
Yes	NA	32%

ADVERTISING/PROMOTIONS*

Sources of Advertising Noticed*	2021	2022
Social media	36%	44%
Internet	35%	42%
Magazine	17%	18%
AAA	7%	16%
VisitMaine.com	14%	14%
Traveler reviews/blogs	14%	12%
Radio	9%	12%
Cable or satellite television	15%	11%
Newspaper	11%	9%
Maine travel/visitor guide	13%	8%
Online streaming service	12%	7%
Brochure	10%	7%
Billboard	9%	5%
Music/podcast streaming	9%	5%
Deal – based promotion	7%	4%
Other	13%	8%
Not sure	2%	1%

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2021	2022
Maine	21%	23%
New England	34%	27%
Mid-Atlantic	21%	22%
Southeast	9%	8%
Southwest	3%	3%
Midwest	7%	7%
West	4%	4%
Canada	1%	4%
International	<1%	2%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2021	2022
Maine	22%	23%
Massachusetts	14%	12%
New York	12%	10%
New Hampshire	8%	7%
Pennsylvania	3%	5%
Connecticut	5%	4%
Florida	4%	4%
New Jersey	2%	3%
Vermont	3%	3%
Ontario	1%	3%

ORIGIN MARKET

Origin Markets	2021	2022
New York City ¹	12%	9%
Boston	10%	9%
Philadelphia	2%	4%
Portland	5%	4%
Washington DC - Baltimore ²	4%	3%
Auburn - Lewiston	1%	2%
Augusta	1%	2%
Brockton, MA	3%	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	19%	14%
As a couple	40%	48%
As a family	30%	26%
With business associates	1%	1%
In a tour group	1%	1%
With other couples/friends	9%	10%
Other	<1%	<1%
Average Travel Party Size	2.7	2.8

TRAVEL WITH CHILDREN*

Children in Travel Party	2021	2022
No children	76%	82%
Children younger than 6	8%	6%
Children 6 – 12	14%	10%
Children 13 – 17	11%	8%

Gender	2021	2022
Male	50%	47%
Female	50%	53%

DEMOGRAPHIC PROFILE

Age	2021	2022
Under 25	5%	6%
25 – 34	20%	18%
35 – 44	26%	24%
45 – 54	18%	21%
55 – 65	19%	21%
Over 65	12%	10%
Median Age	45	46

Race/Ethnicity	2021	2022
White	91%	89%
Asian	2%	4%
Black	2%	2%
Hispanic	3%	2%
Indigenous	1%	1%
Other	1%	2%

LIFESTYLE PROFILE

Marital Status	2021	2022
Single/widowed	22%	23%
Married/living with partner	78%	77%

Employment Status	2021	2022
Employed full-time	55%	55%
Employed part-time	12%	10%
Contract/freelance/temporary employee	10%	9%
Retired	15%	16%
Not currently employed	4%	7%
Student	4%	3%

LIFESTYLE PROFILE

Household Income	2021	2022
Less than \$25,000	4%	7%
\$25,000 - \$49,999	10%	11%
\$50,000 - \$74,999	20%	20%
\$75,000 - \$99,999	23%	21%
\$100,000 - \$149,999	21%	22%
\$150,000 - \$199,999	12%	11%
\$200,000 - \$249,999	6%	4%
\$250,000 or more	4%	4%
Median Household Income	\$92,400	\$89,300

LIFESTYLE PROFILE

Educational Attainment	2021	2022
High school or less	8%	8%
Some college or technical school	14%	13%
College or technical school graduate	51%	56%
Graduate school	27%	23%

NEW & RETURNING VISITORS

Previous Trips to Maine	2021	2022
This is my first time	21%	23%
2 - 5 times	26%	30%
6 - 10 times	15%	16%
11+ times	38%	31%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2021	2022
Drove to Maine	79%	83%
Flew into Boston Logan Intl	2%	5%
Flew into Portland Intl Jetport	9%	4%
Flew into Bangor Intl Airport	2%	2%
Took a motor coach tour or bus	2%	2%
Flew into Northern Maine Regional Airport	2%	1%
Flew into Manchester-Boston Regional Airport	<1%	1%
Flew into another airport	3%	1%
Other	1%	1%

LENGTH OF STAY

Nights Stayed	2021	2022
Not staying overnight	30%	28%
1 night	4%	3%
2 nights	11%	10%
3 nights	11%	14%
4 nights	8%	13%
5+ nights	36%	32%
Average Length of Stay	3.8	4.6

ACCOMMODATIONS

Accommodations	2021	2022
Friends/family home	12%	18%
Hotel/motel/resort	20%	15%
Personal second home	9%	13%
Campground/RV Park	9%	9%
Vacation rental home	7%	6%
Wilderness camping	5%	4%
Bed & Breakfast/Inn	5%	3%
Sporting camp/wilderness lodge	2%	3%
Outdoor Outfitter	0%	<1%
Other	1%	1%
Not spending the night	30%	28%

BOOKING

Booking Methods	2021	2022
Directly with the hotel/condo	34%	38%
Online travel agency	22%	23%
Airbnb	12%	12%
Short term rental service	8%	6%
Vacation rental company	3%	3%
Offline travel agent	2%	1%
Group tour operator	1%	1%
Travel package provider	2%	1%
Other	16%	15%

IN-MARKET RESOURCES*

In-Market Resources	2021	2022
Navigation website/apps	38%	42%
Restaurant website/app	17%	29%
Personal social media	16%	23%
Materials from hotel/campground	10%	18%
Visitor Information Centers	20%	18%
Destination social media	13%	14%
VisitMaine.com	13%	13%
Trip planning app	13%	11%
Hotel/resort website/app	14%	9%
Booking website/app	9%	6%
Airline website/app	6%	4%
Chambers of Commerce	3%	4%
Other	4%	4%
None	35%	33%

ACTIVITIES*

Activities	2021	2022
Food/beverage/culinary	56%	60%
Touring/sightseeing	45%	47%
Active outdoor activities	55%	47%
Shopping	33%	37%
Water activities	32%	30%
Entertainment/attractions	12%	18%
History/culture	19%	16%
Astrotourism	7%	9%
Business conference/meeting	3%	3%
Other	6%	5%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2021	2022
Going to local brew pubs/craft breweries	27%	28%
Ate lobster	23%	23%
Consumed other locally produced Maine foods	14%	23%
Ate other local seafood	24%	21%
Enjoyed unique Maine food or beverages	20%	16%
Enjoying local food at fairs/festivals	9%	14%
Visited Farmer's Markets	9%	12%
Enjoyed high-end cuisine or five-star dining	8%	10%
Ate farm-to-table or organic cuisine	9%	6%
Other	2%	6%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2021	2022
Sightseeing	32%	36%
Driving for pleasure	30%	33%
Enjoying the ocean views/rocky coast	30%	32%
Enjoying the mountain views	30%	32%
Wildlife viewing/bird watching	21%	29%
Photography	21%	26%
Viewing fall colors	18%	20%
Nature cruises or tours	17%	19%
Tours of communities/local architecture	13%	16%
Other	1%	2%

SHOPPING ACTIVITIES*

Shopping Activities	2021	2022
Shopping for unique/locally produced goods	14%	19%
Shopping for gifts/souvenirs	16%	15%
Outlet shopping	19%	15%
Shopping for antiques/local arts and crafts	4%	15%
Shopping at malls	12%	12%
Shopping in downtown areas	12%	9%
Shopping for “Made in Maine” products	9%	8%
Other	0%	2%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2021	2022
Hiking/climbing/backpacking	34%	31%
Exploring State and National Parks	16%	15%
Camping	11%	9%
Alpine skiing/snowboarding	15%	9%
Bicycling touring	6%	7%
Riding all-terrain vehicles	3%	5%
Snowmobiling	5%	5%
Mountain/Fat Biking	5%	5%
Hunting	3%	4%
Nordic skiing	6%	4%
Snowshoeing	5%	4%
Other	5%	5%

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2021	2022
Agricultural fairs	3%	5%
Outdoor fun centers	4%	4%
Bars/nightlife	5%	4%
Amusement/theme parks	3%	3%
Animal parks/zoos	4%	3%
Water parks	4%	2%
Summer camps	2%	2%
Children's museums	3%	1%
Horseback riding	3%	1%
Attend sporting events	2%	1%
Other	3%	7%

WATER ACTIVITIES*

Water Activities	2021	2022
Canoeing/kayaking	15%	17%
Fishing	15%	15%
Going to the beach	12%	11%
Outdoor swimming	13%	10%
Motor boating	7%	9%
Water skiing/jet skiing	4%	4%
Pool swimming	3%	2%
White water rafting	2%	2%
Sailing	3%	2%
Surfing	1%	1%
Other	2%	1%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2021	2022
Visit historic sites/museums	12%	11%
Visit art museums/local artisan studios	11%	8%
Attend popular music concerts/events	3%	6%
Get to know the local people and/or culture	11%	6%
Attend plays/musicals/theatrical events	4%	2%
Painting/drawing/sketching	6%	2%
Attend operas/classical music events	2%	1%
Other	1%	<1%

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2021	2022
No other states/provinces	63%	57%
New Hampshire	21%	28%
Massachusetts	13%	16%
Vermont	10%	16%
New York	11%	10%
Connecticut	4%	5%
Rhode Island	4%	5%
Ontario	2%	3%
New Brunswick	1%	1%
Newfoundland and Labrador	1%	1%
Nova Scotia	2%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
Other	3%	2%

TRAVELING IN MAINE*

Maine Regions Visited	2021	2022
Maine	24%	31%
The Maine Beaches	26%	28%
Downeast & Acadia	20%	22%
Greater Portland & Casco Bay	26%	21%
Kennebec Valley	18%	15%
The Maine Highlands	17%	15%
Aroostook County	6%	6%
Other	<1%	<1%
No other regions	32%	28%

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2021	2022
Would recommend Maine	98%	98%
Would not recommend Maine	0%	1%
Not sure	2%	1%

Recommending Regions	2021	2022
Definitely recommend region	97%	88%
Probably would recommend region	1%	10%
Would not recommend region	0%	<1%
Not sure	2%	2%

SATISFACTION

Satisfaction	2021	2022
Very satisfied	NA	64%
Satisfied	NA	35%
Dissatisfied	NA	<1%
Don't know	NA	1%

RETURNING TO MAINE

Returning to Maine	2021	2022
Definitely will return	80%	73%
Probably will return	11%	16%
Probably will not return	1%	<1%
Not sure	8%	11%

TRIP EXPECTATIONS

Exceeded Expectations	2021	2022
Activities & attractions	54%	59%
Friendliness of people	55%	51%
Lodging	42%	49%
Authentic & unique communities	49%	45%
Customer service	43%	38%
Restaurants	41%	36%
Shopping	41%	33%
Value for your money	41%	32%

OVERCROWDING

Overcrowding	2021	2022
Overcrowded	NA	8%
A little overcrowded	NA	30%
The number of visitors was fine	NA	49%
Not at all overcrowded	NA	11%
Other	NA	2%

STUDY METHODS



METHODOLOGY



Visitor Tracking

464 interviews were completed with visitors to Maine Lakes & Mountains 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 Maine Lakes & Mountains is a function of direct spending by visitors to Maine Lakes & Mountains, 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 Maine Lakes & Mountains. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Maine Lakes & Mountain's multiplier is 1.57.

MAINE LAKES & MOUNTAINS

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022

Downs & St. Germain Research
850 – 906 – 3111 | contact@dsg-research.com

