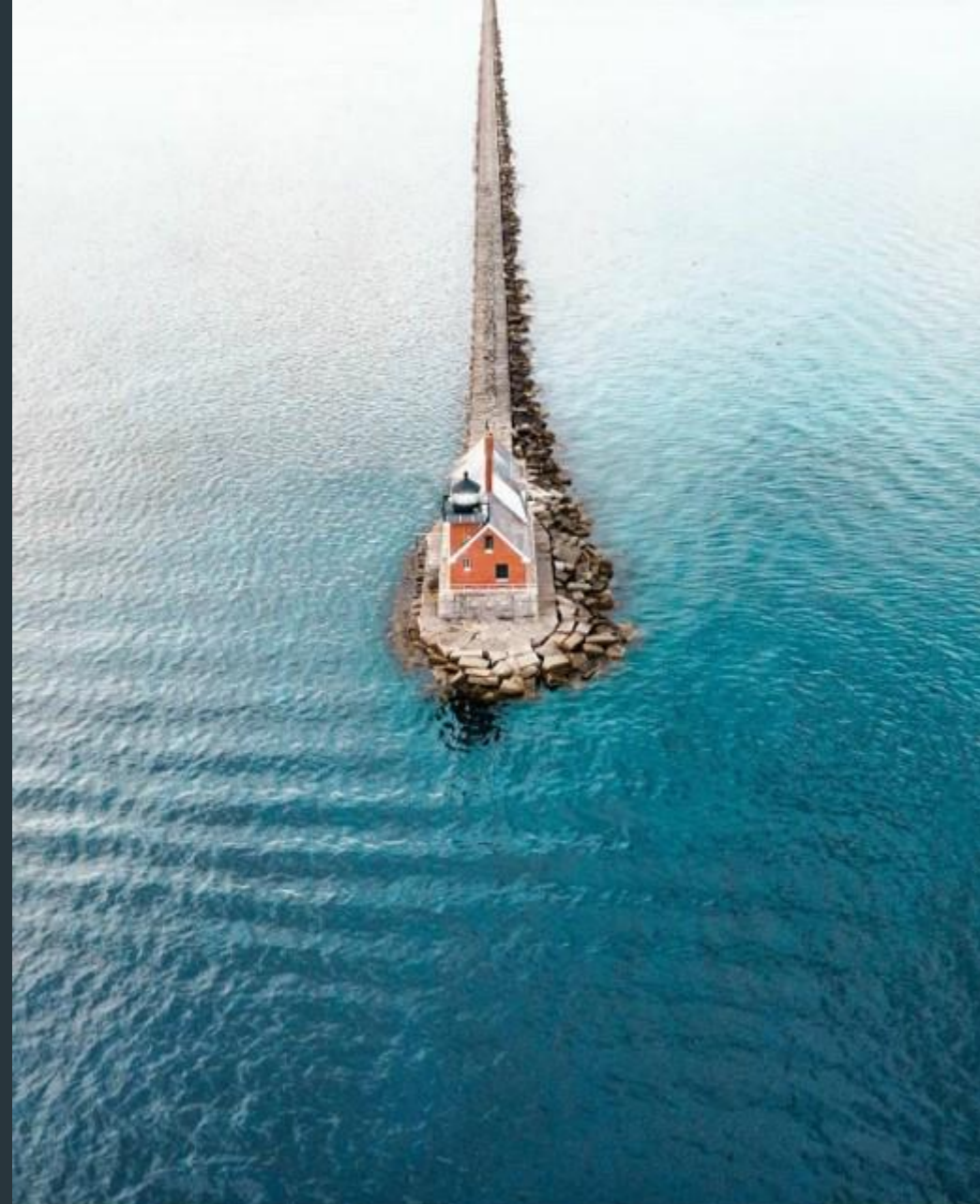


MIDCOAST & ISLANDS

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022



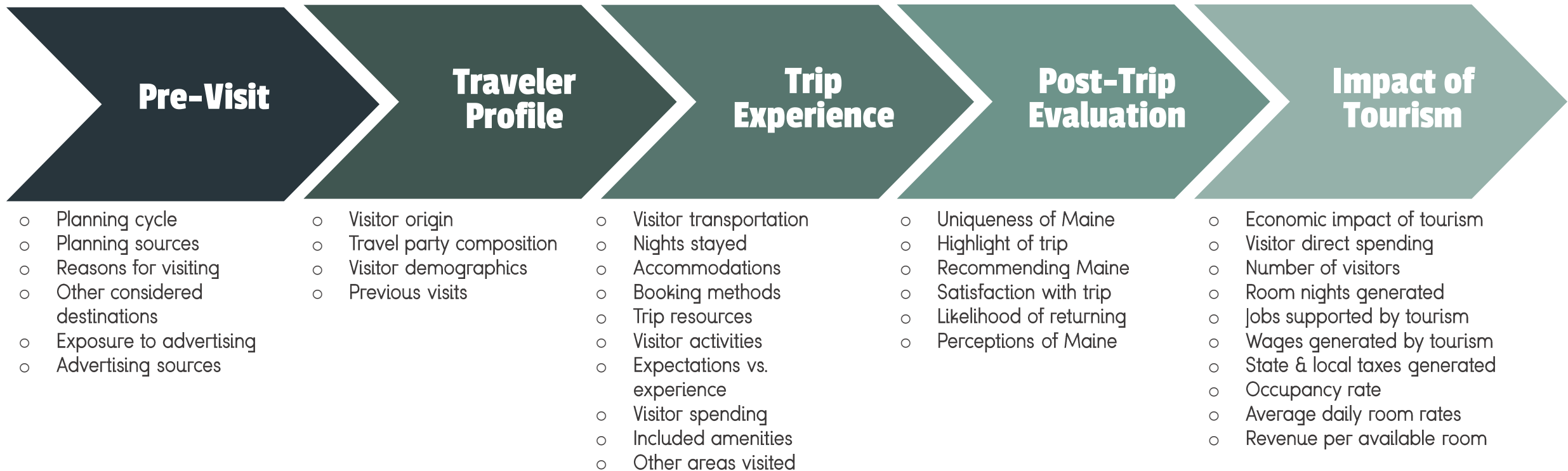
INTRODUCTION



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Midcoast & Islands 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 Midcoast & Islands.



EXECUTIVE SUMMARY



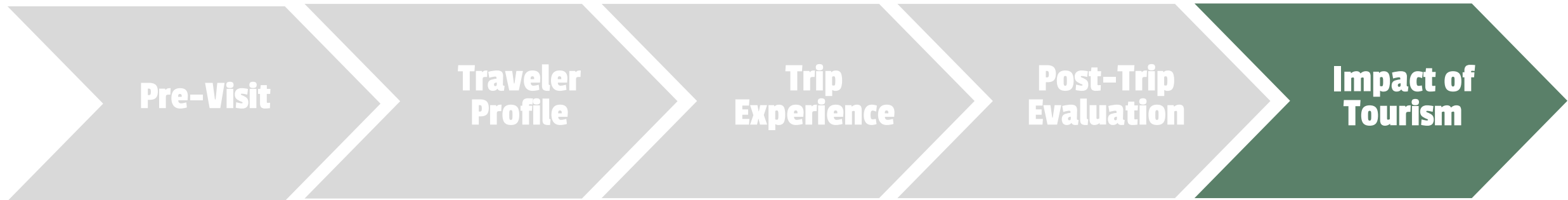
MIDCOAST & ISLANDS

Compared to visitors to other regions, visitors to Midcoast & Islands region are more likely to:

- » Use online search engines, AAA, and advice from friends and family to plan their trip
- » Come to Maine to visit friends and family
- » Notice and be influenced by advertising prior to their trip to Maine
- » Use restaurant websites/apps while in Maine
- » Engage in food, beverage, and culinary activities while in Maine



TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,514,991,300

in economic impact to the Midcoast & Island's
economy, up **3.6%** from 2021



DIRECT SPENDING

Visitors to Midcoast & Islands spent

\$1,010,423,900

throughout the county in 2022 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **3.9%** from 2021



VISITORS

Midcoast & Islands attracted

2,013,900

visitors in 2022, down **3.6%** from 2021



VISITORS DAYS*

All visitors to Midcoast & Islands spent

9,832,100

days visitors in Midcoast & Islands 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 Midcoast & Islands generated

1,624,200

nights in Midcoast & Islands accommodations
throughout 2022, up **+18.4%** from 2021



JOBS SUPPORTED

Visitors to Midcoast & Islands supported
the creation of

16,100

jobs throughout the county in 2022, the
same as 2021



WAGES GENERATED

Visitors to Midcoast & Islands supported

\$514,503,100

in wages paid to Midcoast & Islands employees
in 2022, up **+4.0%** from 2021



VISITORS & JOBS

Every

125

visitors supports a new job in Midcoast & Islands



HOUSEHOLD SAVINGS

Visitors to Midcoast & Islands saved local households

\$1,934

in state and local taxes in 2022



LODGING METRICS

Occupancy Rate

55.1%

+ 7.6% from 2021

Average Daily Rate

\$169.98

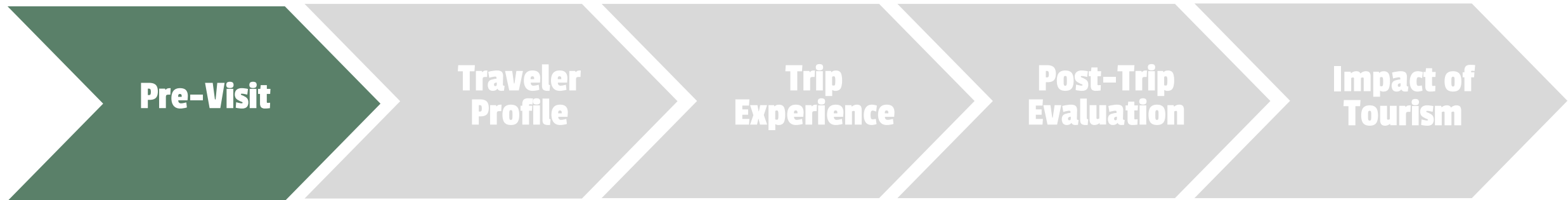
+ 1.2% from 2021

Revenue per Available Room

\$93.66

+ 8.9% from 2021

TRIP PLANNING CYCLE : PRE-VISIT



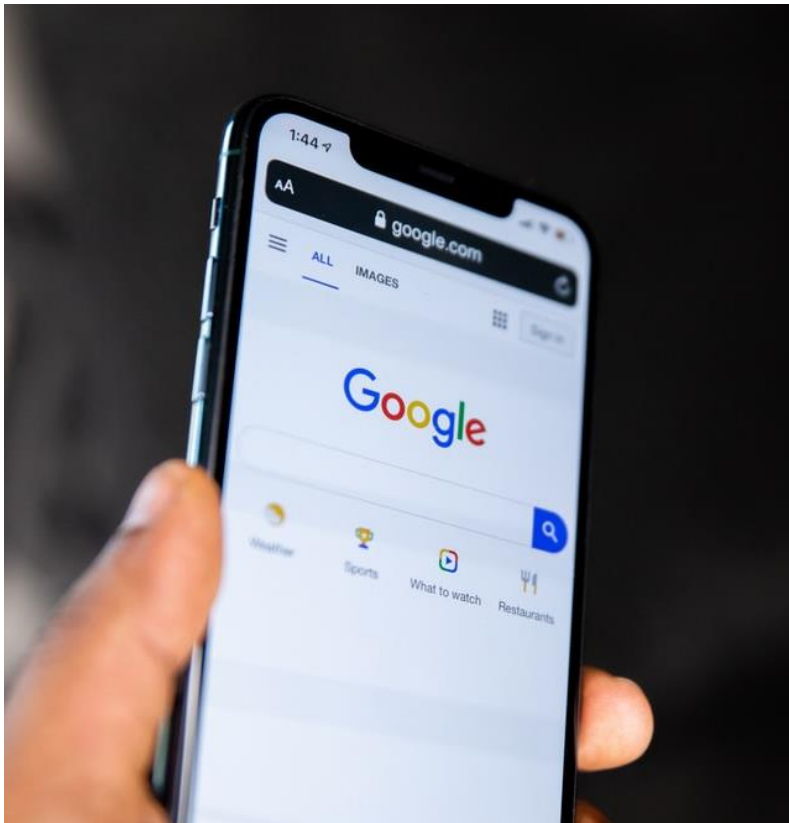
TRIP PLANNING CYCLE

- » Nearly **4 in 5** visitors started planning their trip a month or more in advance of their trip
- » **57%** of visitors have a booking window of less than 3 months



TOP ONLINE TRIP PLANNING SOURCES*

82% of visitors used one or more online resources to help them plan their trip in Midcoast & Islands



54% Online search engines



24% Hotel websites



17% Facebook



24% Travel Reviews/blogs/stories



17% Instagram

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



57% Advice from friends/family



38% Articles or travelogues



26% AAA

*Multiple responses permitted.

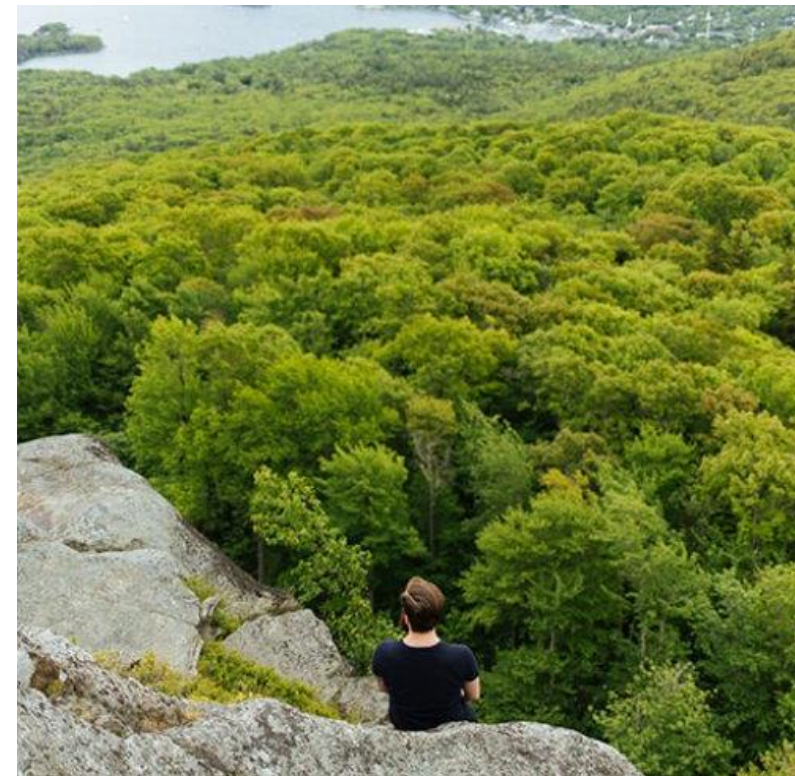
TOP REASONS FOR VISITING*



34% Visiting friends/relatives



28% Shopping



27% Relax and unwind

*Multiple responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » **57%** (-8% points from 2021) of visitors did not consider visiting any U.S. state or Canadian province instead of Midcoast & Islands 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

- » **73%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to Midcoast & Islands (+**20%** points from 2021)
- » This information influenced **51%** of all Midcoast & Islands visitors to visit Maine



TOP SOURCES OF ADVERTISING EXPOSURE*

Base: 73% who noticed advertising



45% Social media



39% Internet



24% Magazine

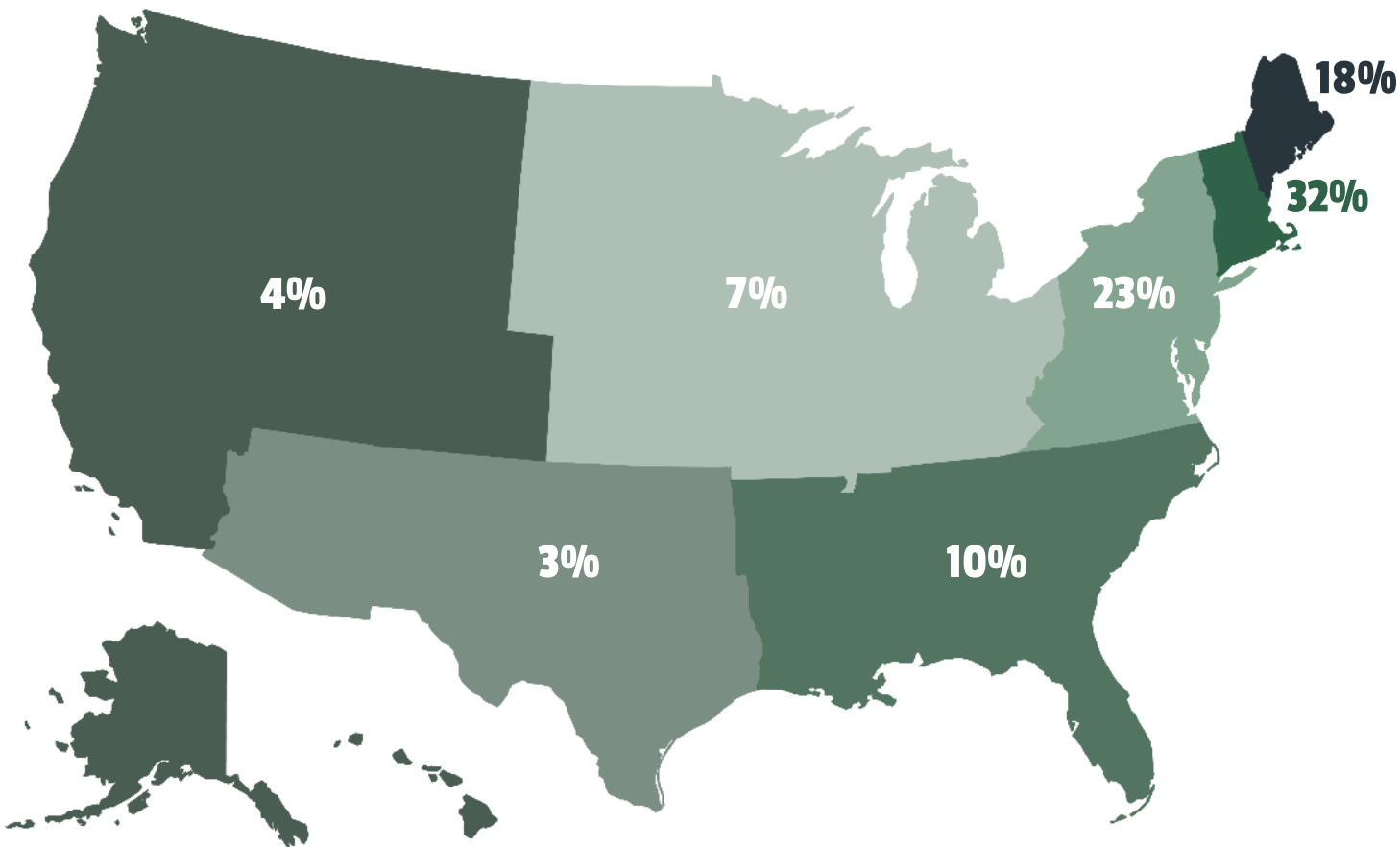
*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN

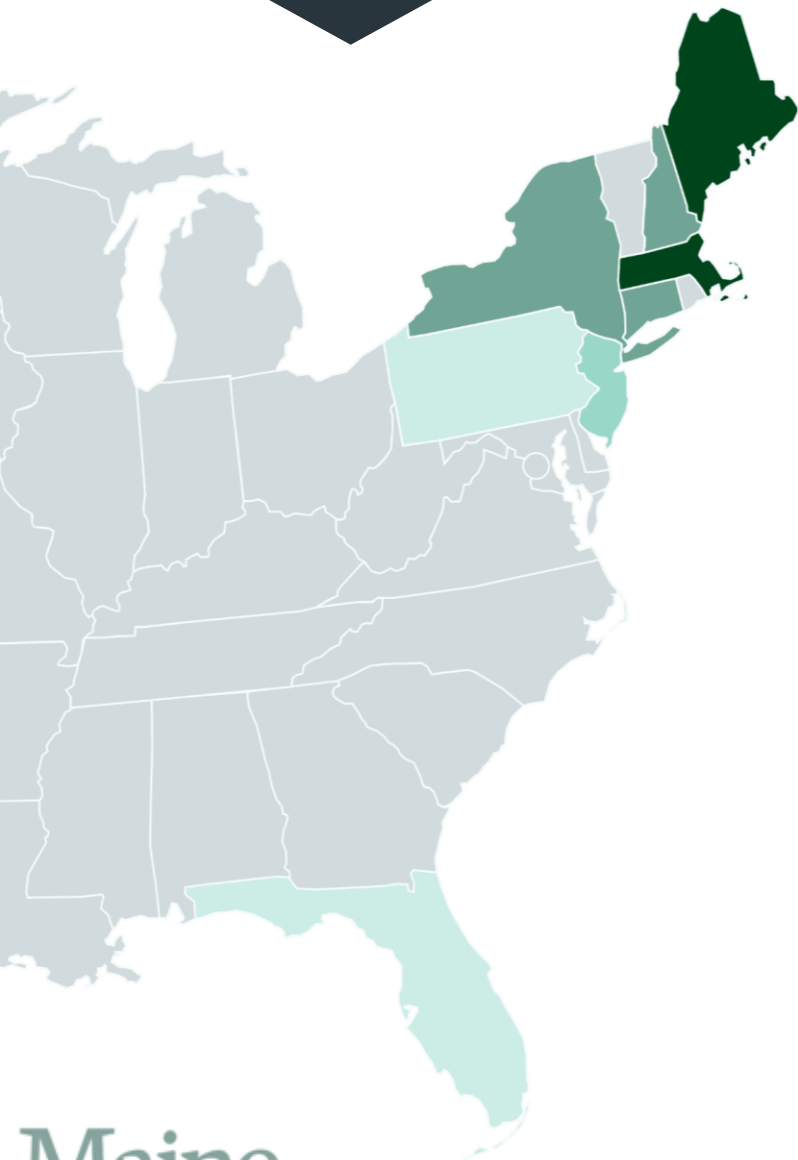
International visitation increased **+3% points** from 2021



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

2% of visitors came Canada.

TOP ORIGIN STATES & PROVINCES



68%

of visitors traveled from **8** U.S. states, including from other regions of Maine.

18 %	Maine	7 %	Connecticut
14 %	Massachusetts	5 %	New Jersey
9 %	New York	4 %	Florida
8 %	New Hampshire	4 %	Pennsylvania

TOP ORIGIN MARKETS



9% New York City¹



9% Boston



4% Washington D.C. – Baltimore²

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

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

TRAVEL PARTIES

The typical Midcoast & Islands visitor traveled with **3.0** people in their visitor party



14% of visitors traveled with at least one person under the age of 18 in their travel party



DEMOGRAPHIC PROFILE

» The typical Midcoast & Islands visitor:

- » Is **50** years old¹
- » Female² - **60%**
- » Is white - **86%**



¹Median age.

²Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Midcoast & Islands visitor:
 - » Is a college graduate - **83%**
 - » Is married/in a domestic partnership - **80%**
 - » Is employed full-time - **42%**
 - » Has an annual household income¹ of **\$83,700**



¹Median household income.

NEW & RETURNING VISITORS

- » **23%** of visitors to Midcoast & Islands were traveling in Maine for the first time
- » **19%** of visitors to Midcoast & Islands had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **82%** of visitors drove to their Midcoast & Islands destination
- » **7%** of visitors to Midcoast & Islands flew to Maine through Portland International Jetport



NIGHTS STAYED

- » **86%** of visitors spent one or more nights in Midcoast & Islands
- » Typical visitors stayed **5.0*** nights in Midcoast & Islands on their trip

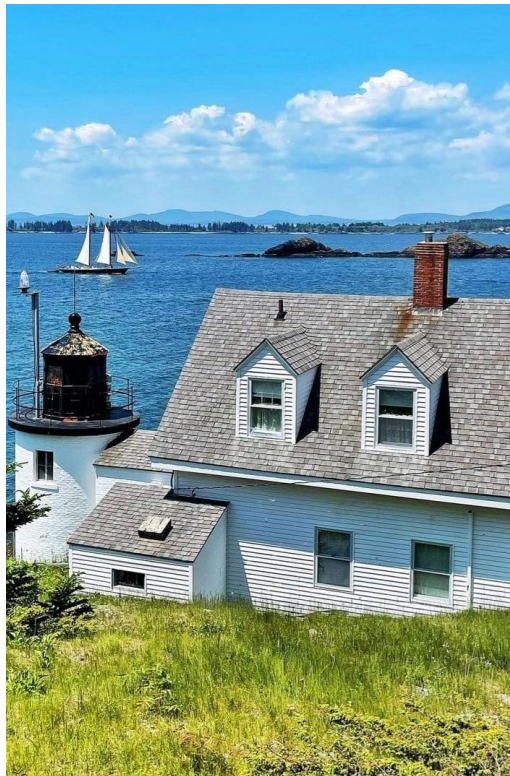


* Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

TOP ACCOMMODATIONS



29% Hotel/motel/resort



19% Friends/family home



14% Vacation rental home



14% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*

Over **half** of visitors used one or more in-market resources to help them plan places to go while in Midcoast & Islands



59% Navigation websites/apps



54% Restaurant website/app



35% Personal Social Media

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



88% Food/beverage/
culinary



57% Shopping



51% Touring/sightseeing

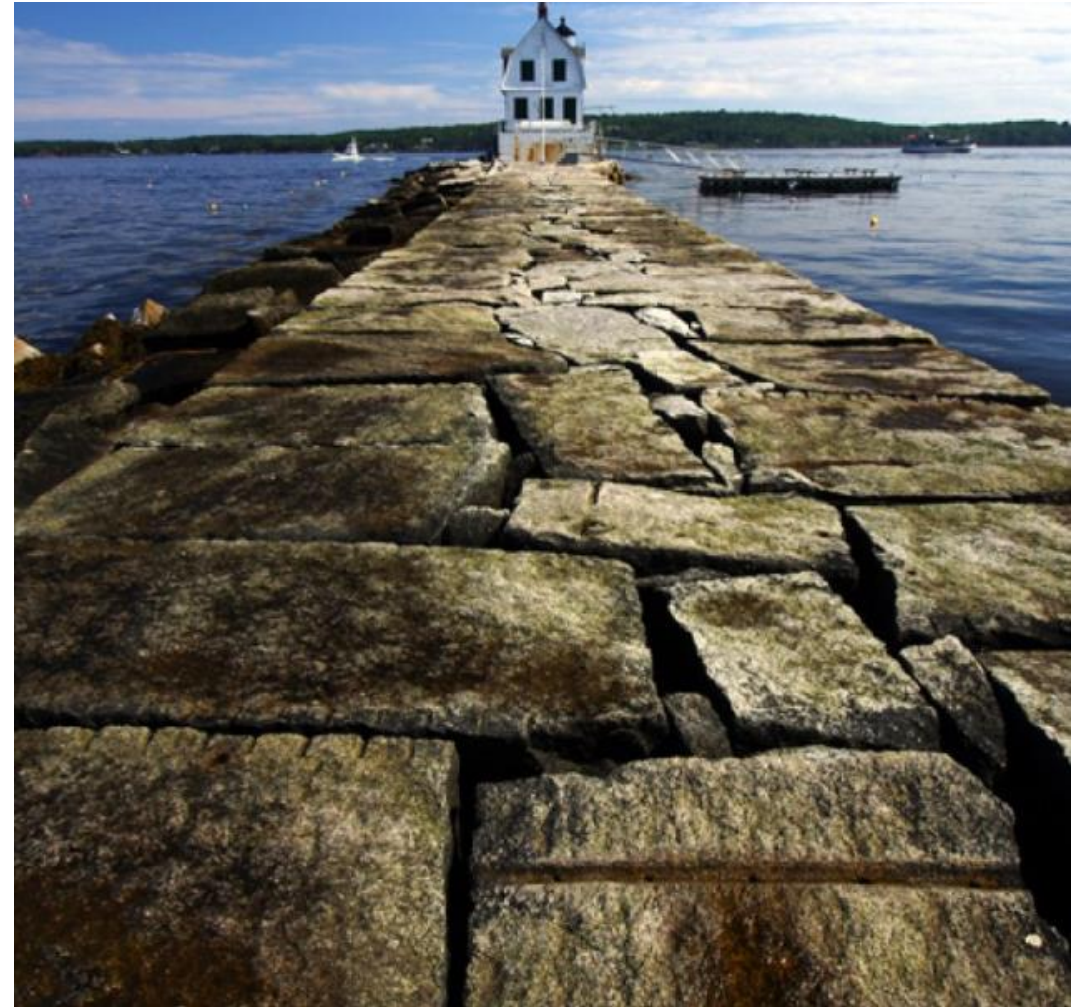


42% Entertainment/
attractions

*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in Midcoast & Islands spent **\$595** per day and **\$3,019** during their trip
- » Visitors who stayed overnight in unpaid accommodations in Midcoast & Islands spent **\$251** per day and **\$1,796** during their trip
- » Visitors who did not stay overnight in Midcoast & Islands spent **\$270** during their trip



VISITING OTHER STATES & PROVINCES

- » About **6 in 10** visitors to Midcoast & Islands did not visit any other U.S. state or Canadian province
- » Midcoast & Islands 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

» Over **7 in 10** visitors to Midcoast & Islands traveled to other regions during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **96%** of visitors to Midcoast & Islands would recommend Maine to a friend or relative as a vacation destination
- » **97%** of visitors to Midcoast & Islands would recommend that their friends and family visit the region
 - » **56%** would definitely recommend Midcoast & Islands



LIKELIHOOD OF RETURNING TO MIDCOAST & ISLANDS

- » **82%** of visitors to Midcoast & Islands will likely return to Maine for a future visit or vacation
- » Over **1 in 2** visitors will “definitely return” to Maine in the future



SATISFACTION

- » **97%** of visitors were satisfied with their trip to Midcoast & Islands
- » However, increased cost and the current lack of work force negatively affected visitors' trip experiences: **22%** of visitors said that the restaurants did not meet their expectations and **33%** said the customer service did not meet their expectations



OVERCROWDING

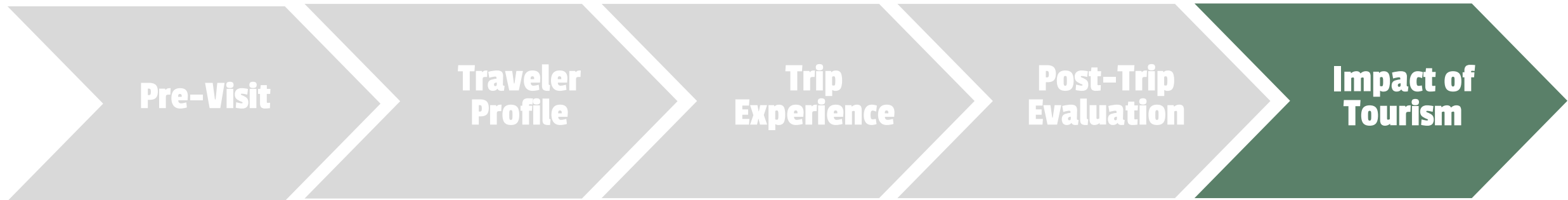
- » **4 in 10** visitors thought the number of visitors during their trip to Midcoast & Islands was fine
- » **17%** of visitors though it was a little overcrowded



DETAILED FINDINGS



TRIP PLANNING CYCLE : PRE-VISIT



KEY PERFORMANCE INDICATORS

Economic Impact	2021	2022	Δ% from '21
Number of Visitors	2,089,400	2,013,900	- 3.6%
Room nights generated	1,371,600	1,624,200	+ 18.4%
Direct expenditures	\$972,872,000	\$1,010,423,900	+ 3.9%
Total economic impact	\$1,462,644,500	\$1,514,991,300	+ 3.6%

EMPLOYMENT IMPACTS

Midcoast & Islands Jobs	2021	2022	Δ% from '21
Jobs generated (direct)	12,400	12,500	+ 0.8%
Total employment impact	16,100	16,100	--

Midcoast & Islands Wages	2021	2022	Δ% from '21
Wages paid (direct)	\$360,739,800	\$376,298,500	+ 4.3%
Total impact on wages	\$494,687,000	\$514,503,100	+ 4.0%

RETURN ON INVESTMENT

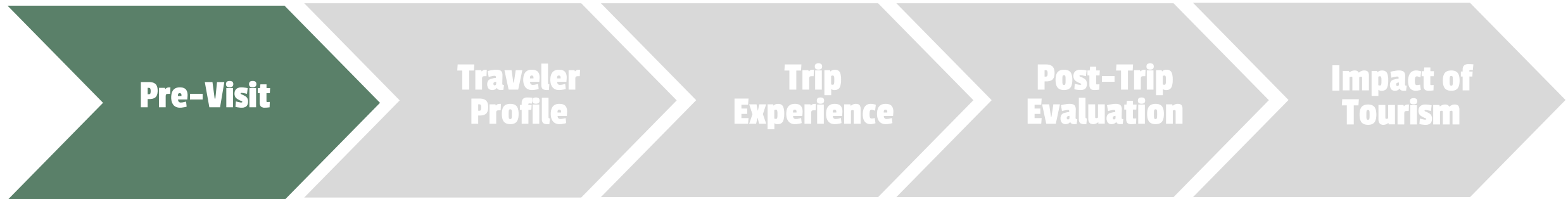
Return on Investment	2021	2022
Visitors per job supported	130	125
State & local taxes supported	\$124,221,800	\$127,627,800
Tax savings per household	\$1,894	\$1,934

LODGING METRICS

Lodging Metrics	2021*	2022	Δ% from '21
Occupancy Rate (%)	51.2%	55.1%	+ 7.6%
Average Daily Rate	\$168.04	\$169.98	+ 1.2%
RevPAR	\$86.04	\$93.66	+ 8.9%
Total Lodging Revenue	\$241,426,700	\$244,260,800	+ 1.1%

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

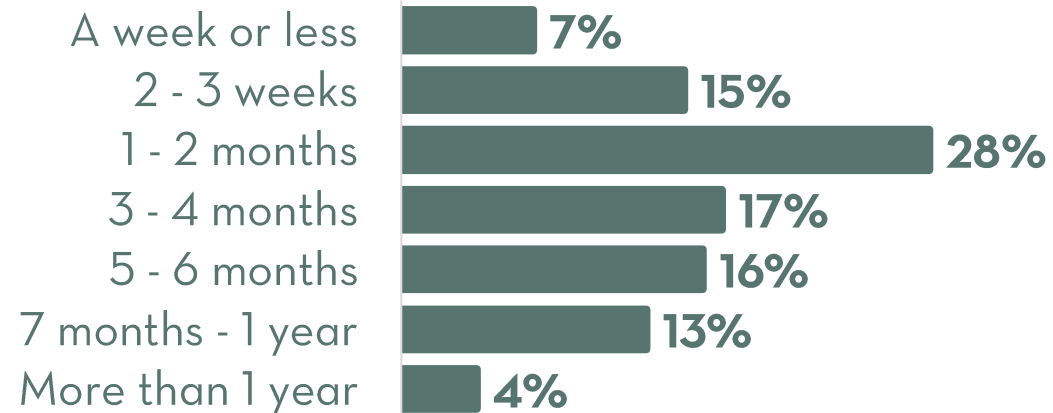
TRIP PLANNING CYCLE : PRE-VISIT



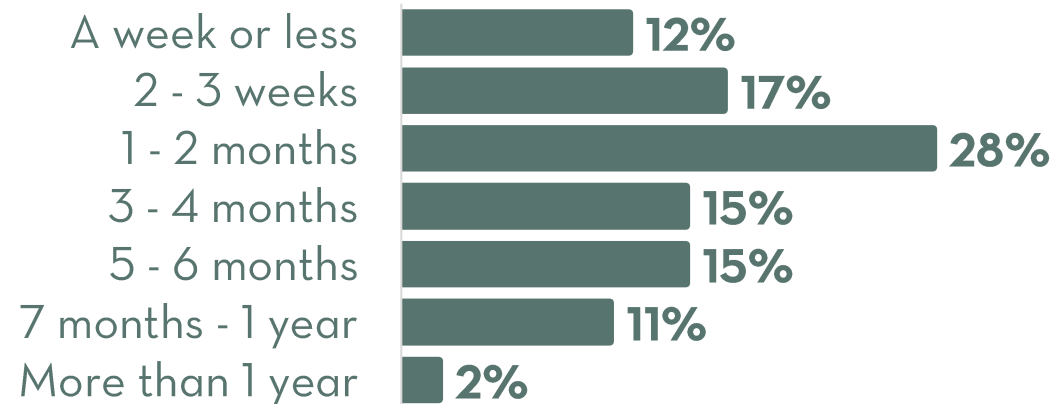
TRIP PLANNING CYCLE

- » Typical visitors to Midcoast & Islands began planning their trip **60 days** in advance (-8 days from 2021)
- » About **4 in 5** visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **53 days** in advance (-5 days from 2021)
- » Nearly **3 in 5** of visitors have a booking window of less than 3 months

Beginning of Trip Cycle

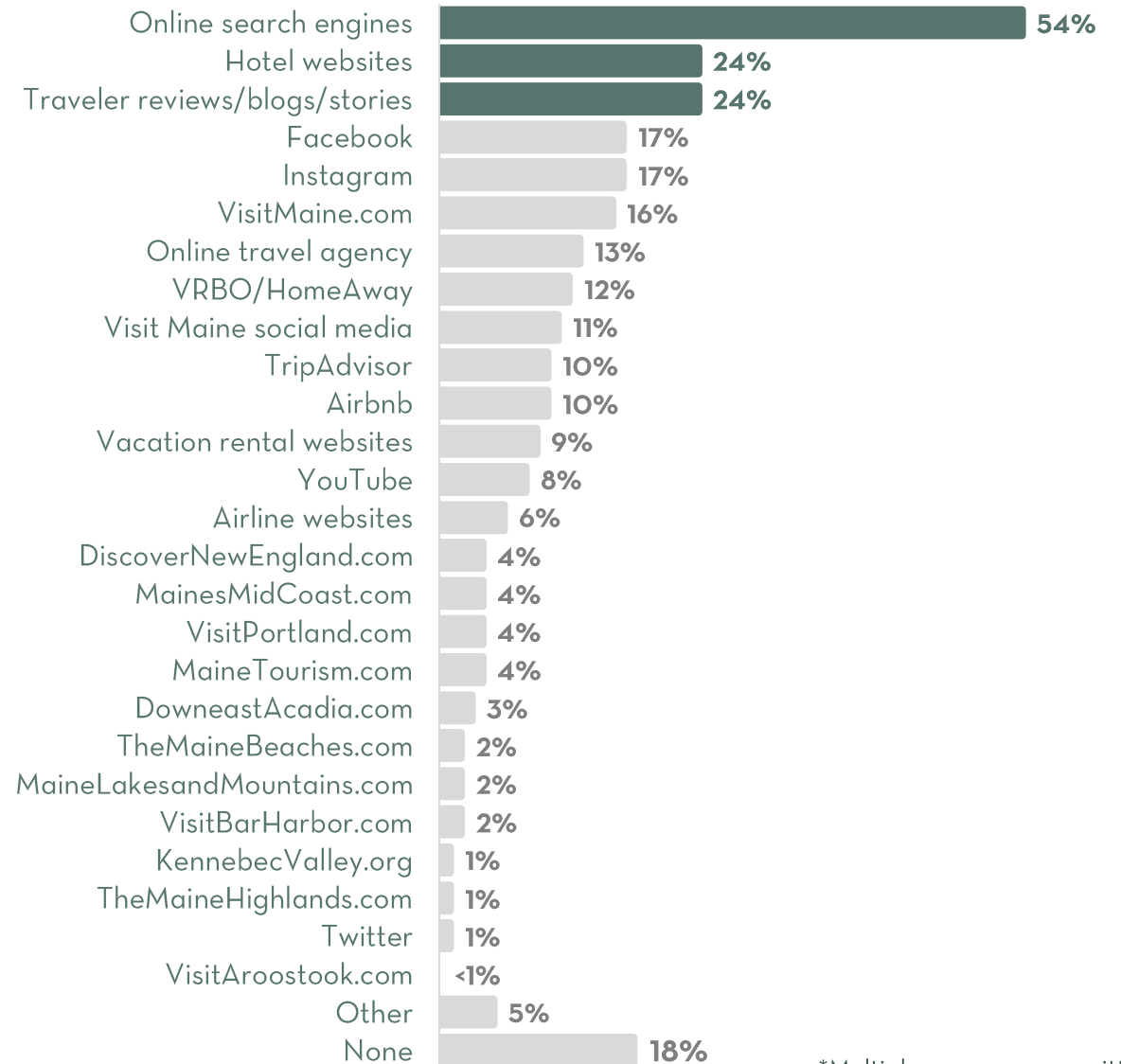


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

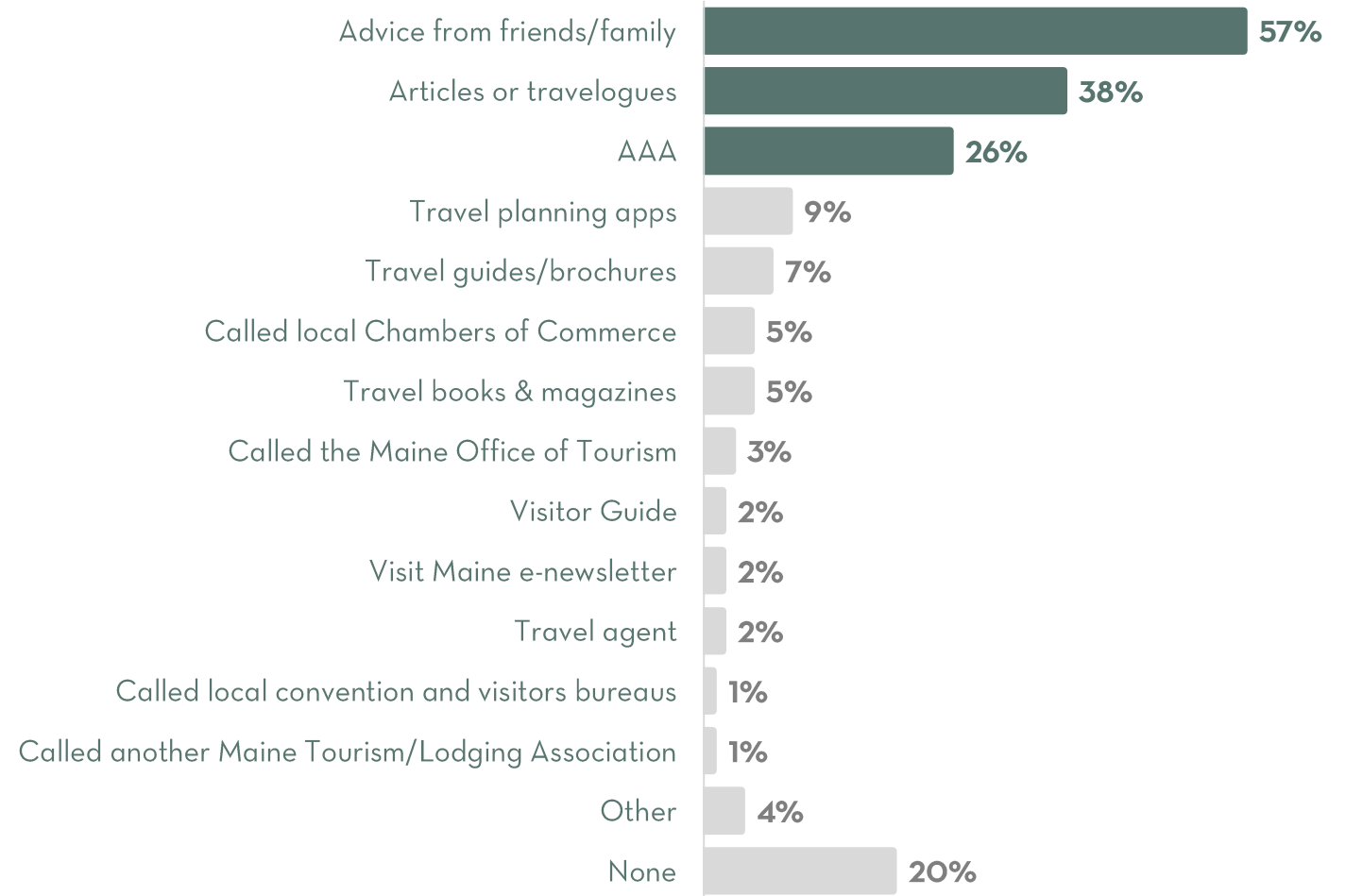
- » Over **half** of visitors used an online search engine, such as Google, to help them plan their trip to Midcoast & Islands
- » **16%** of visitors used VisitMaine.com (+1% from 2021)
- » More visitors used Hotel websites (+4% points) compared to 2021



*Multiple responses permitted.

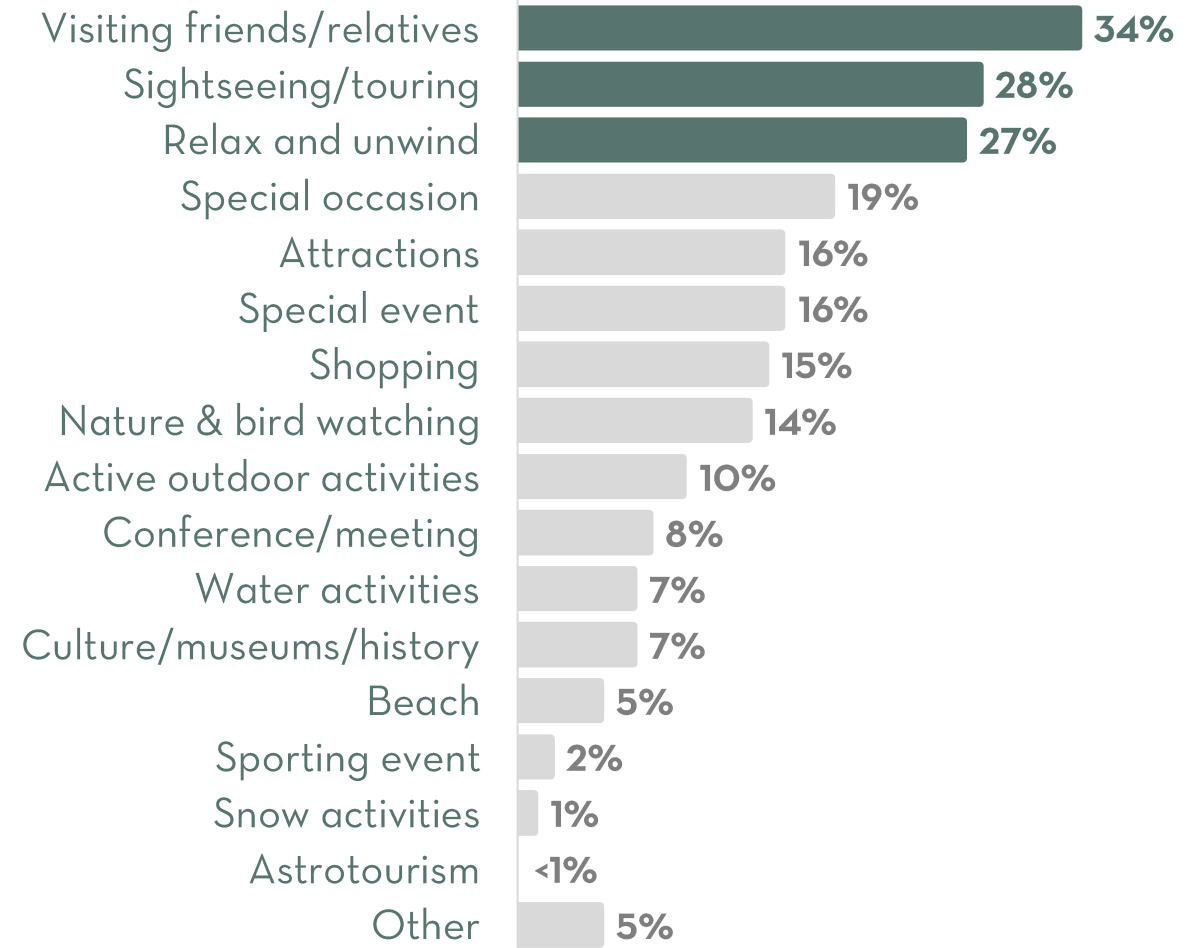
OTHER TRIP PLANNING SOURCES*

- » Nearly **3 in 5** of visitors relied on advice from their friends and family to help them plan their trip to Midcoast & Islands
- » Over **1 in 3** visitors used articles or travelogues (+19% points from 2021), and about **1 in 4** used AAA (+9% points from 2021) to help plan their trip to Midcoast & Islands
- » **1 in 4** visitors did not use any other resources to help them plan their trip to Midcoast & Islands



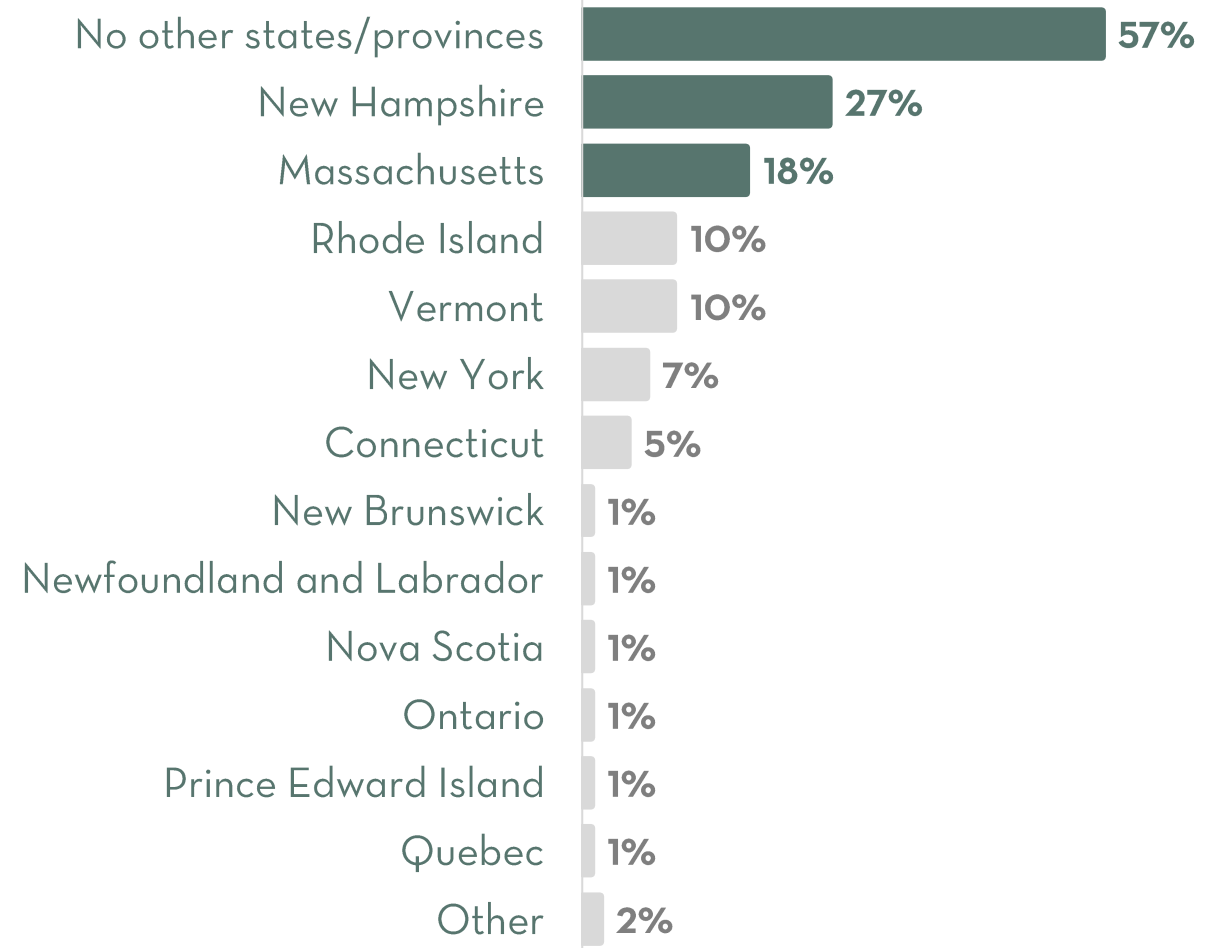
REASONS FOR VISITING*

- » Over **1 in 3** visitors traveled to Midcoast & Islands to visit friends and relatives
- » Nearly **3 in 10** visitors traveled to Midcoast & Islands to go sightseeing/touring
- » Over **1 in 4** visitors came to Midcoast & Islands to relax and unwind



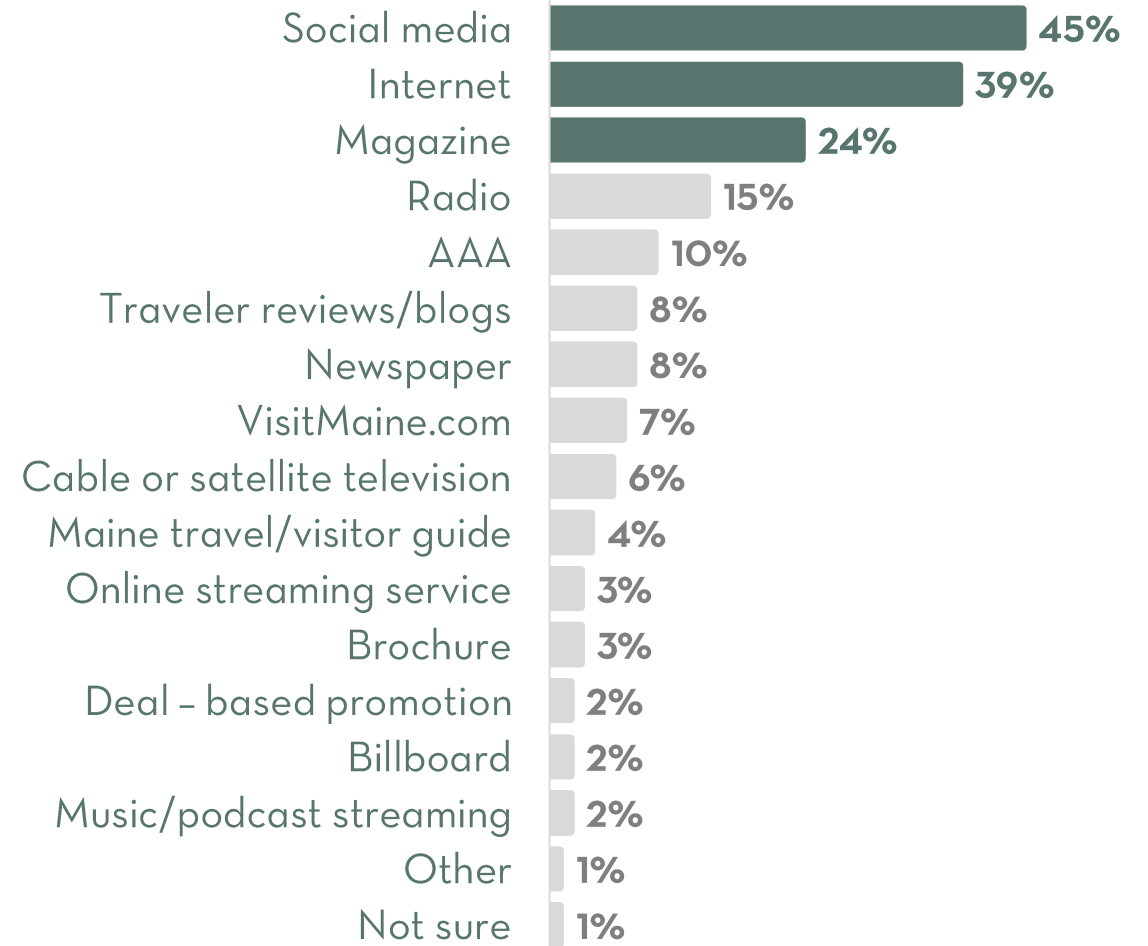
OTHER STATES & PROVINCES CONSIDERED*

- » **57%** (-8% points from 2021) of visitors considered visiting **only** Maine while planning their trips to Midcoast & Islands
- » Visitors to Midcoast & Islands were **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

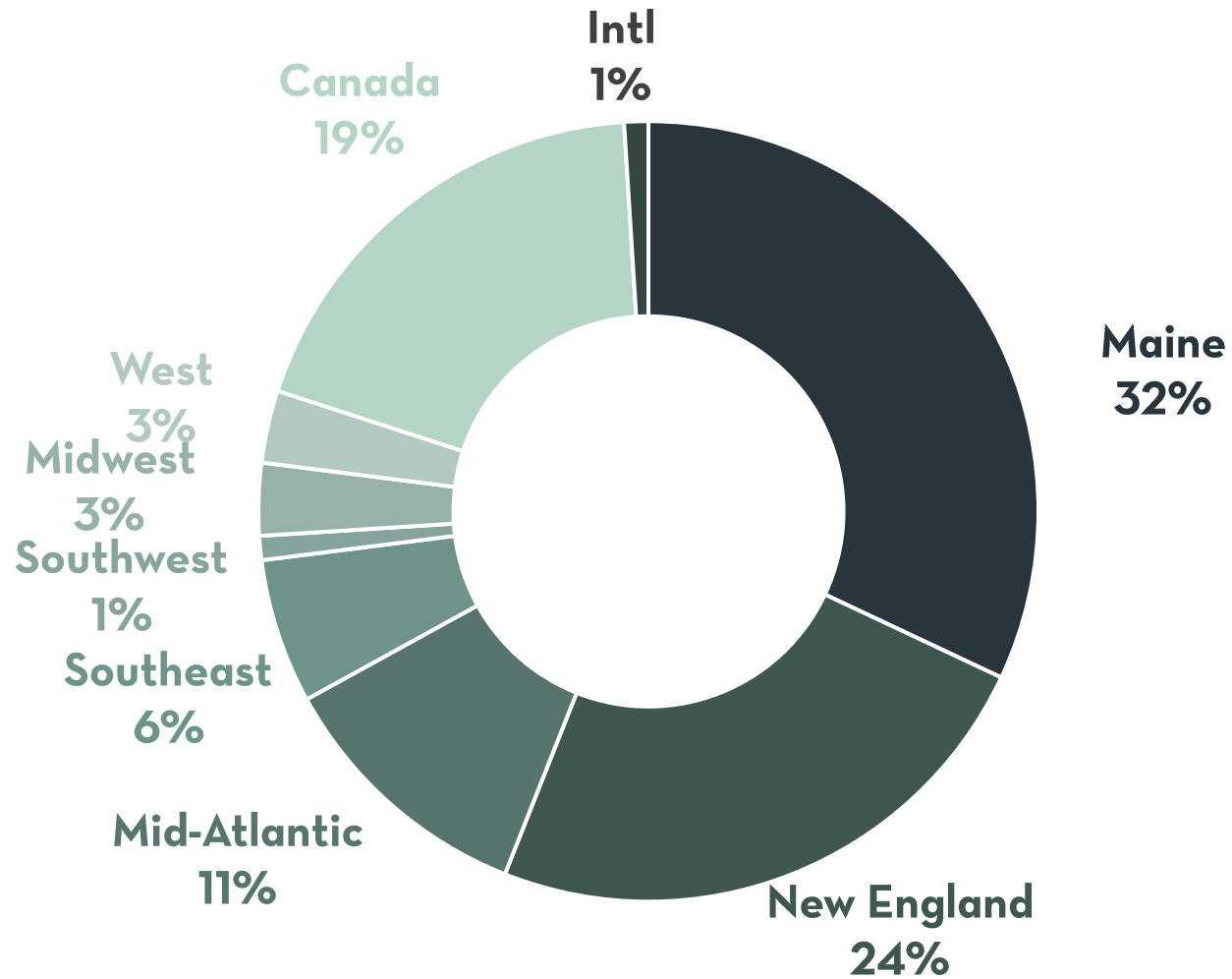
- » **73%** (+20% points from 2021) of visitors noticed advertising or promotions for Maine prior to their trip to Midcoast & Islands
- » Visitors who recalled this advertising primarily saw it on **social media** (+9% points from 2021) or the **internet**
- » This information influenced **51%** of all Midcoast & Islands visitors to visit Maine



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **81%** of visitors to Midcoast & Islands were from 14 U.S. states
- » Nearly **1 in 5** visitors were residents of Maine traveling throughout the state

State	Percent
Maine	18%
Massachusetts	14%
New Hampshire	8%
New York	8%
Connecticut	7%
New Jersey	5%
Florida	4%
Pennsylvania	4%
Virginia	3%
Maryland	2%
Ohio	2%
Rhode Island	2%
Texas	2%
Vermont	2%

TOP ORIGIN MARKETS

- » About **1 in 3** visitors to Midcoast & Islands traveled from **9** U.S. markets
- » **9%** of visitors traveled to Midcoast & Islands from either New York City and Boston

Market	Percent
New York City ¹	9%
Boston	9%
Washington DC - Baltimore ²	4%
Philadelphia	2%
Providence, RI	2%
Auburn - Lewiston	2%
Augusta	2%
Portland	2%
Waterville	2%

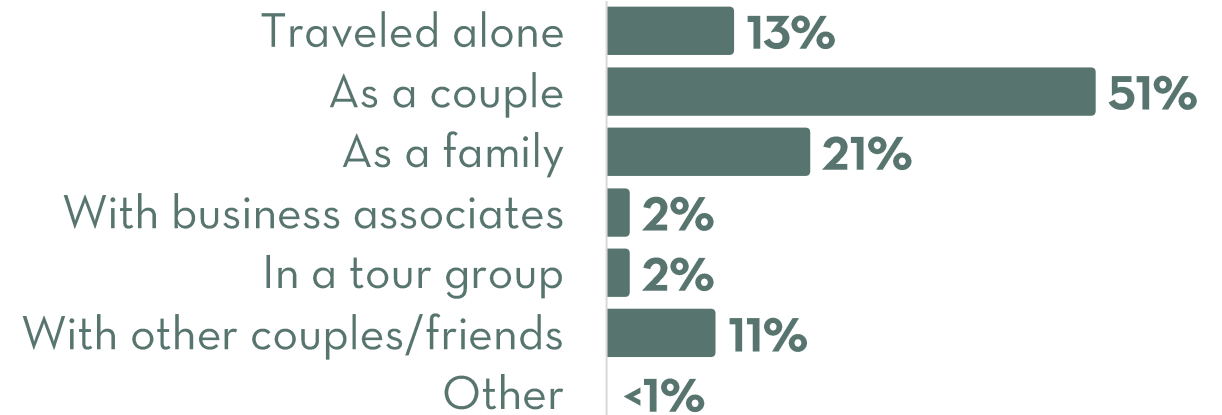
¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

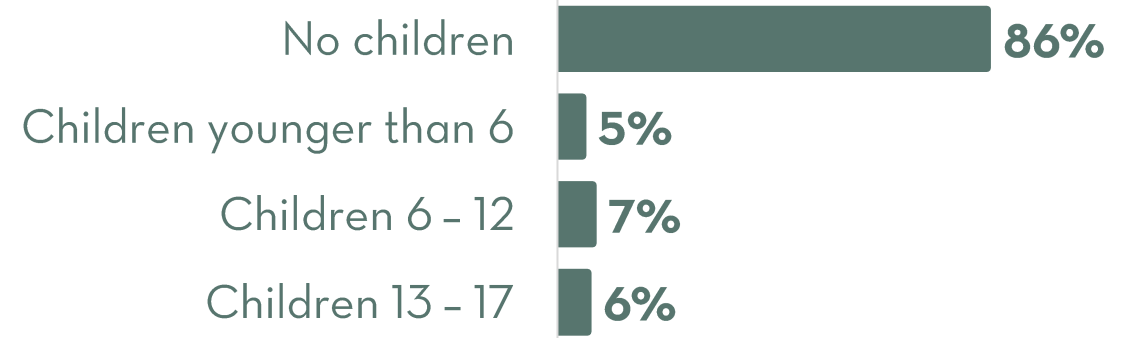
TRAVEL PARTIES

- » Typical visitors traveled to Midcoast & Islands in parties of **3.0** people
- » **1 in 2** of visitors traveled as a couple
- » **14%** of visitors traveled with one or more children in their travel party

Travel Party Composition



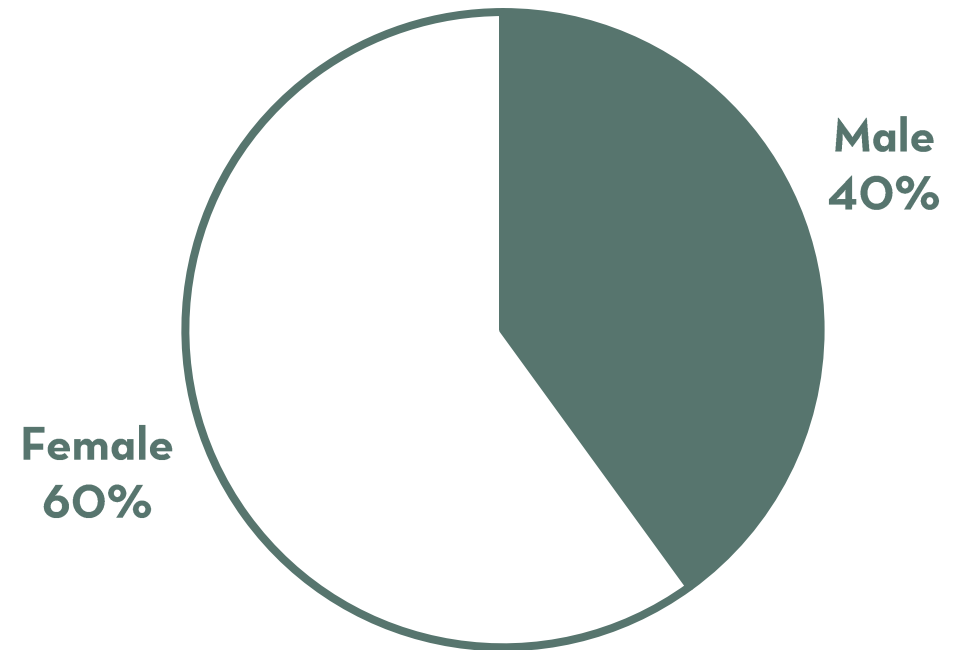
Children in Travel Party*



*Multiple responses permitted.

GENDER

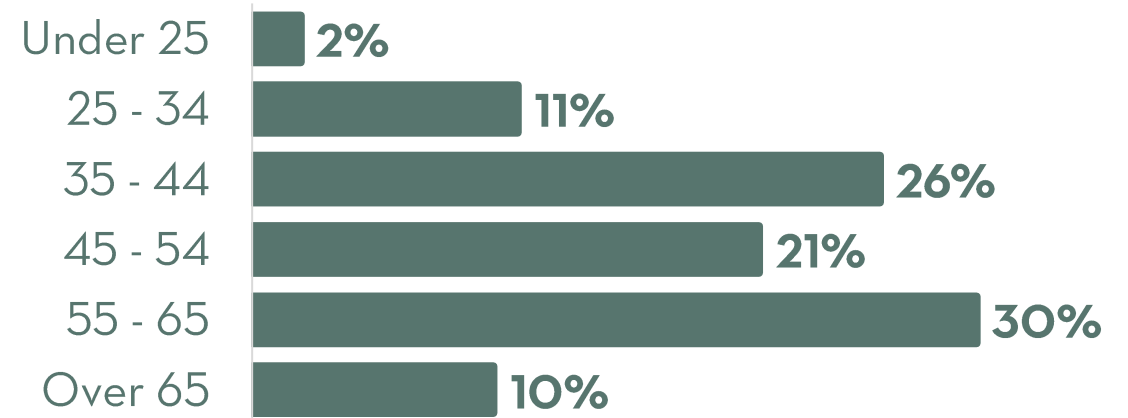
- » **3 in 5** visitors to Midcoast & Islands interviewed were females



*Of visitors interviewed.

AGE

- » The average age of visitors to Midcoast & Islands is **50** years old



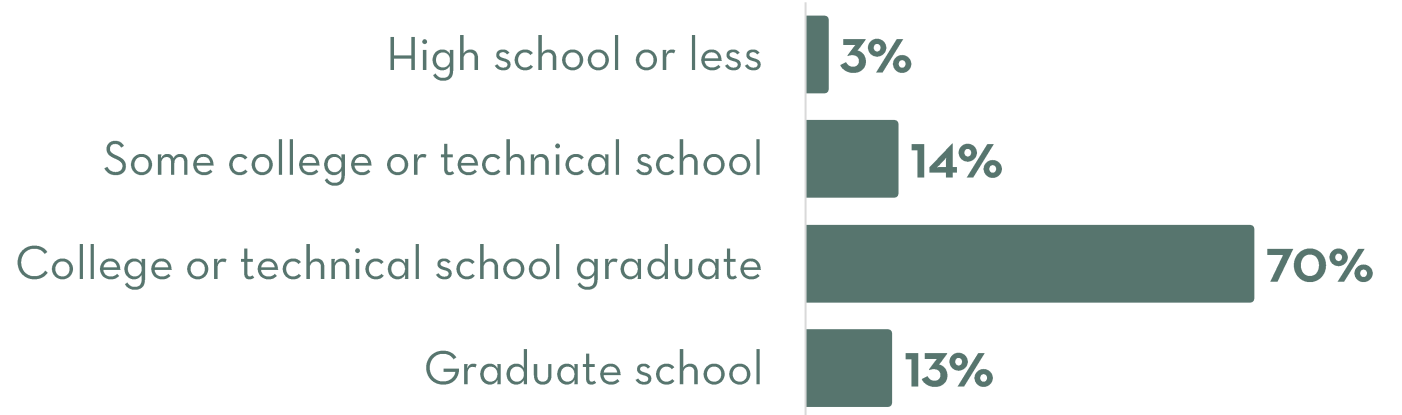
RACE & ETHNICITY

- » Nearly **9 in 10** visitors to Midcoast & Islands were white



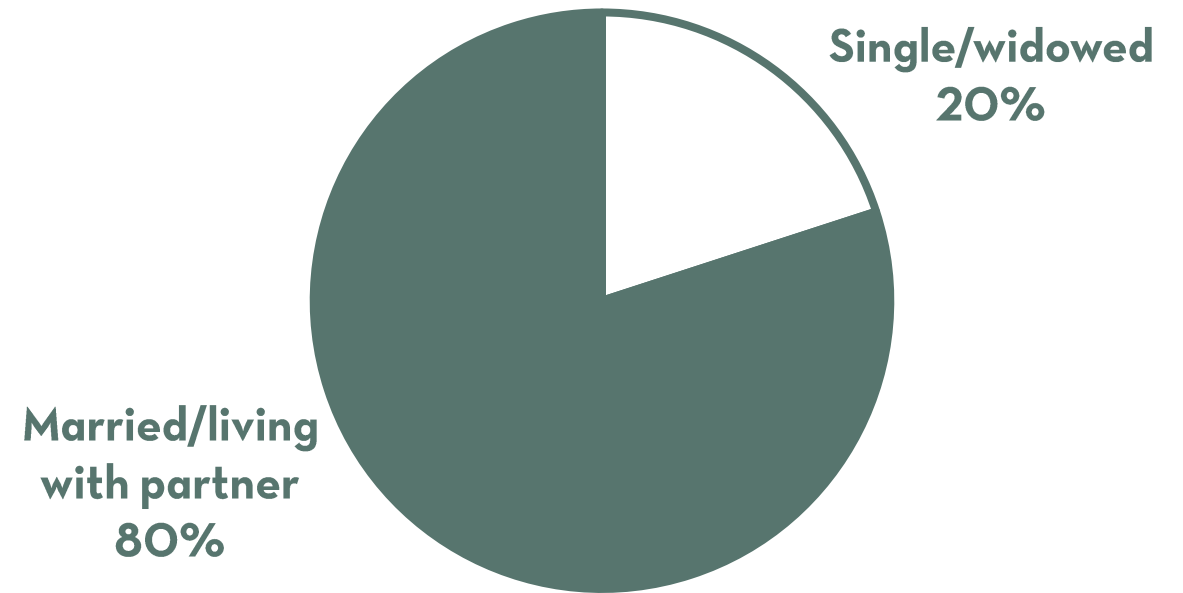
EDUCATIONAL ATTAINMENT

- » **4 in 5** visitors to Midcoast & Islands have a college/technical school degree or higher



MARITAL STATUS

» **4 in 5** visitors to Midcoast & Islands were married or living with their partner



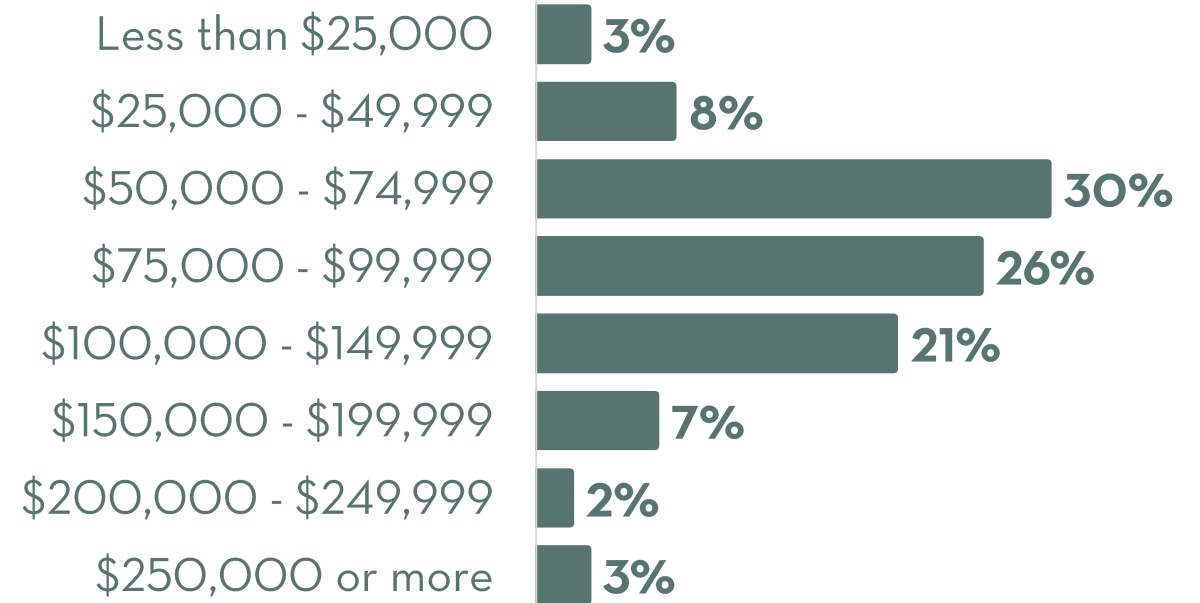
EMPLOYMENT STATUS

» Nearly **3 in 4** visitors to Midcoast & Islands were employed, most full-time



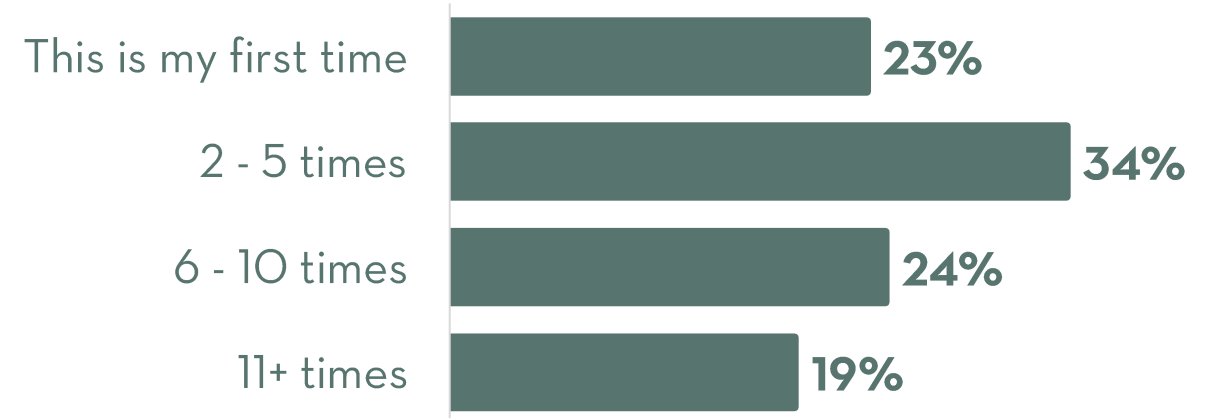
HOUSEHOLD INCOME

- » The average household income of visitors to Midcoast & Islands is **\$83,700** per year
- » **12%** of visitors to Midcoast & Islands earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » Almost **1 in 4** visitors to Midcoast & Islands were traveling in Maine for the first time
- » About **1 in 5** visitors to Midcoast & Islands had previously traveled in Maine more than 10 times

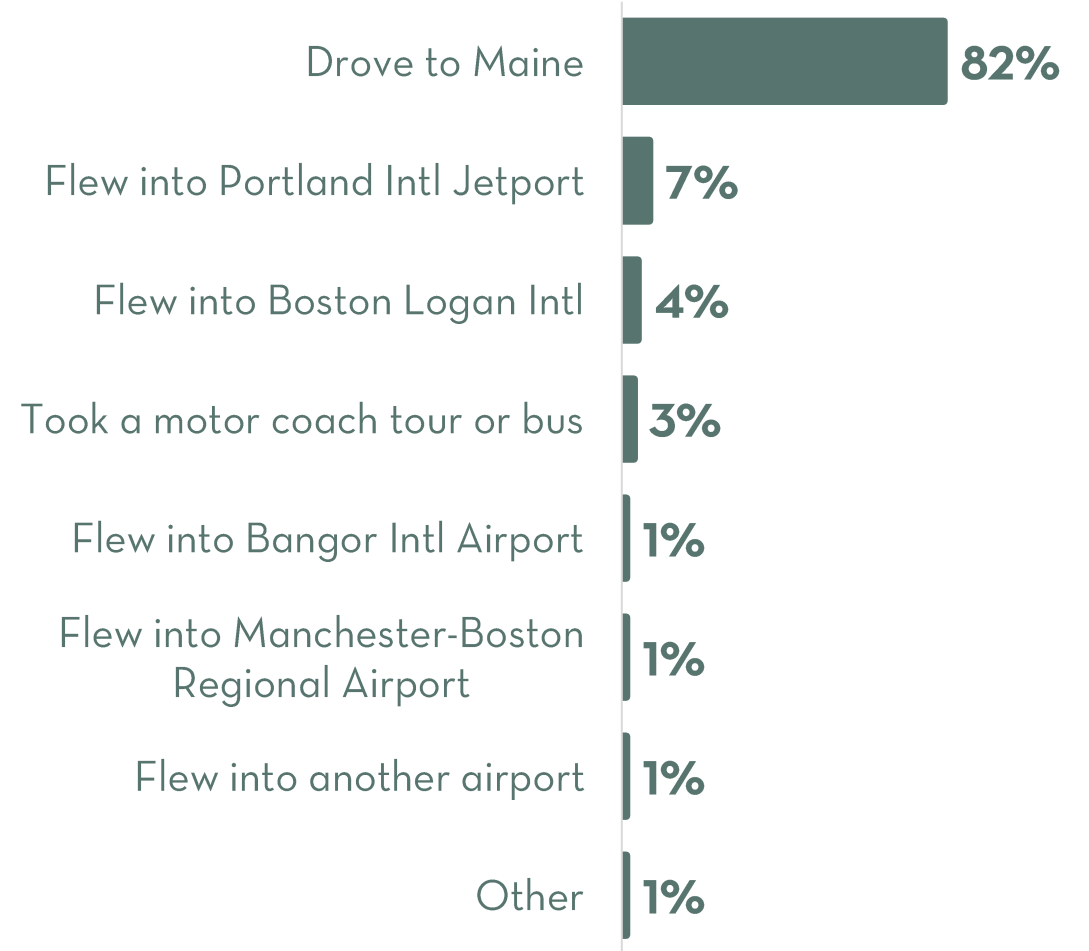


TRIP PLANNING CYCLE : TRIP EXPERIENCE



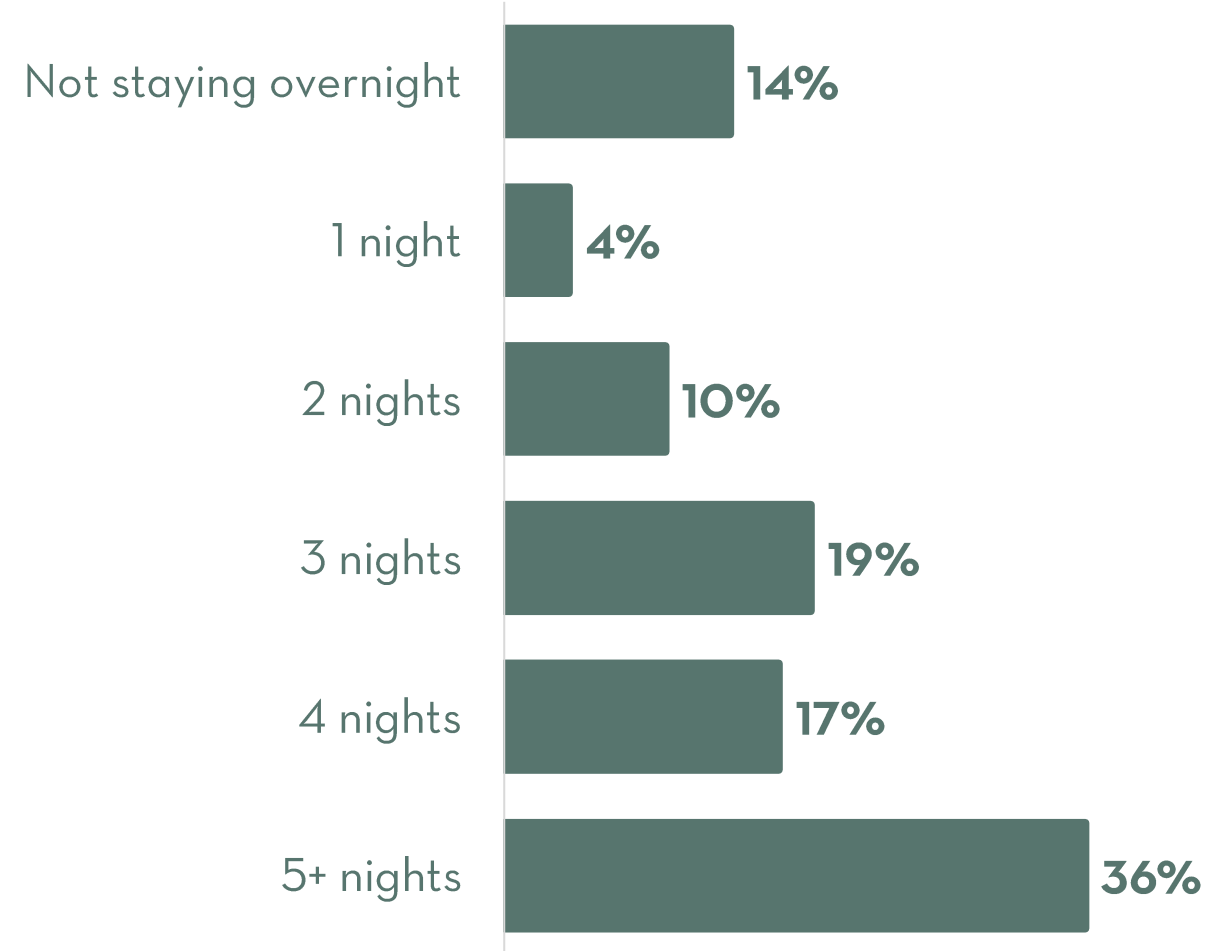
MODES OF TRANSPORTATION

- » Midcoast & Islands is a drive-market for most visitors, with **82%** choosing to travel by car over plane, motor coach/bus, or train
- » Most Midcoast & Islands visitors who flew to Maine arrived at Portland International Jetport or Boston Logan International Airport



NIGHTS STAYED

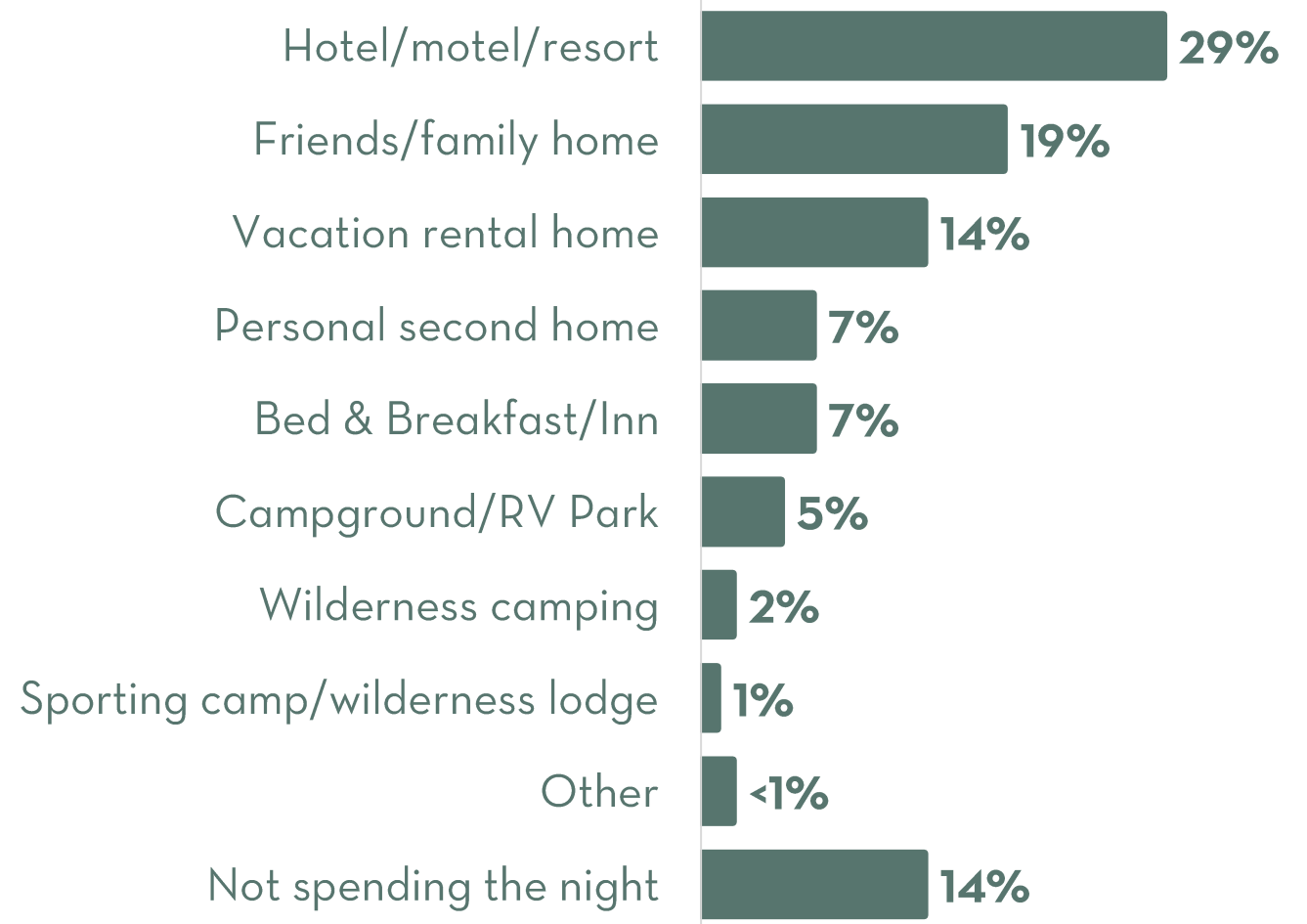
- » **86%** of visitors to Midcoast & Islands stayed one or more nights in Maine on their trip
- » Typical visitors stayed **5.0*** nights in Midcoast & Islands on their trips
- » Typical visitors to Midcoast & Islands staying overnight in paid accommodations stayed **4.3** nights in Maine on their trips



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

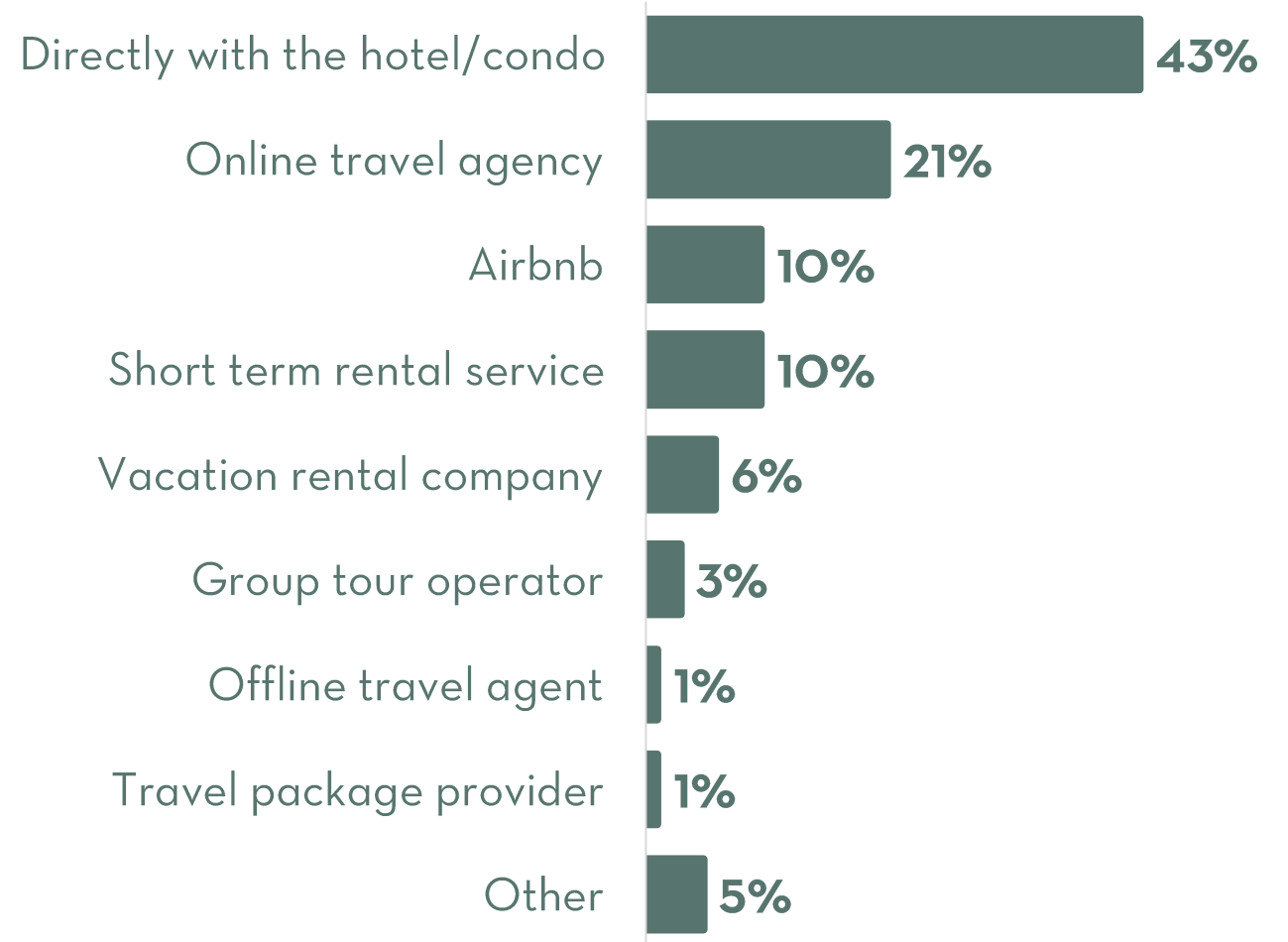
ACCOMMODATIONS

- » About **3 in 10** visitors to Midcoast & Islands stayed overnight at a hotel/motel/resort
- » Nearly **1 in 5** visitors stayed with friends and relatives on their trip to Midcoast & Islands



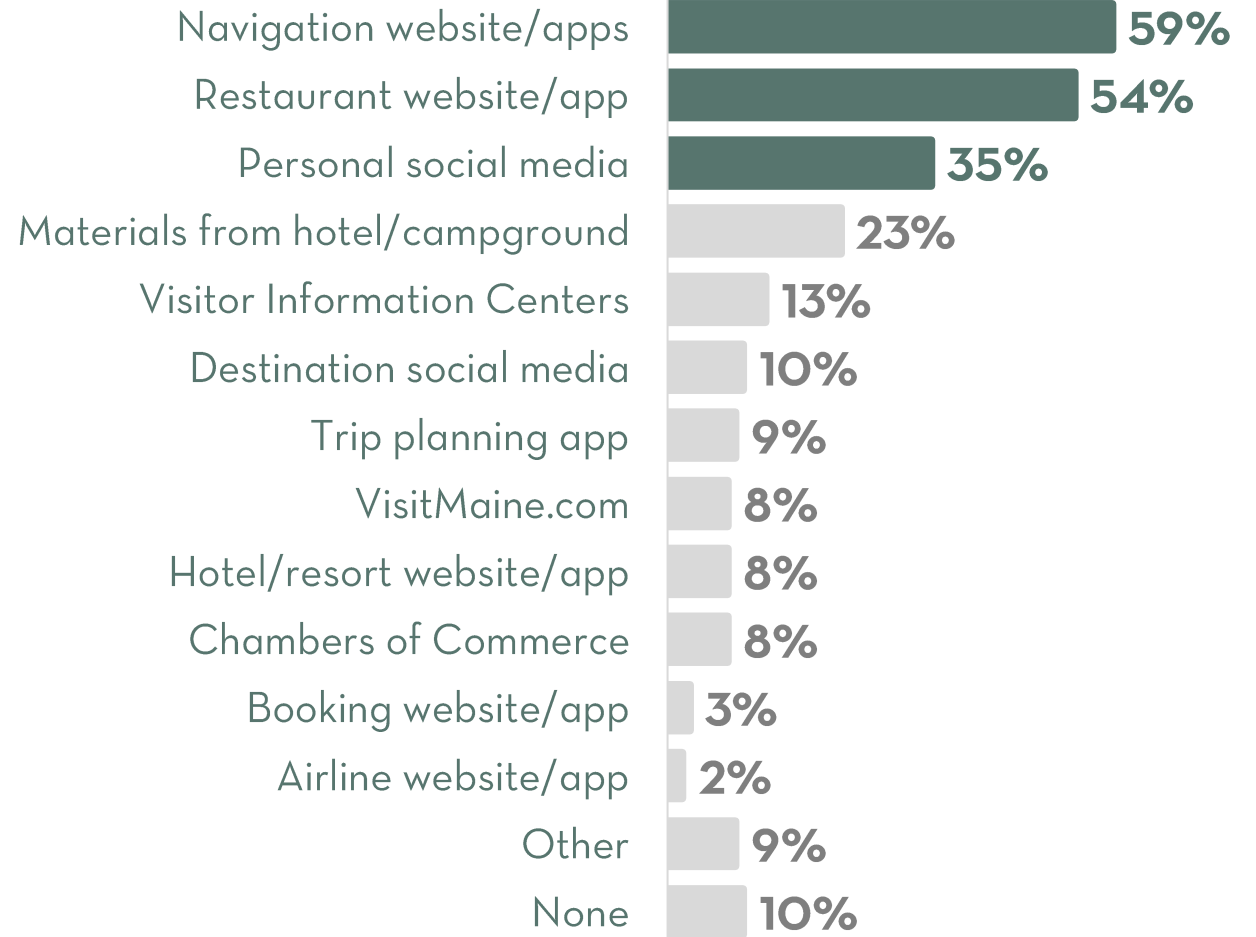
BOOKING METHODS

- » Over **2 in 5** visitors to Midcoast & Islands who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



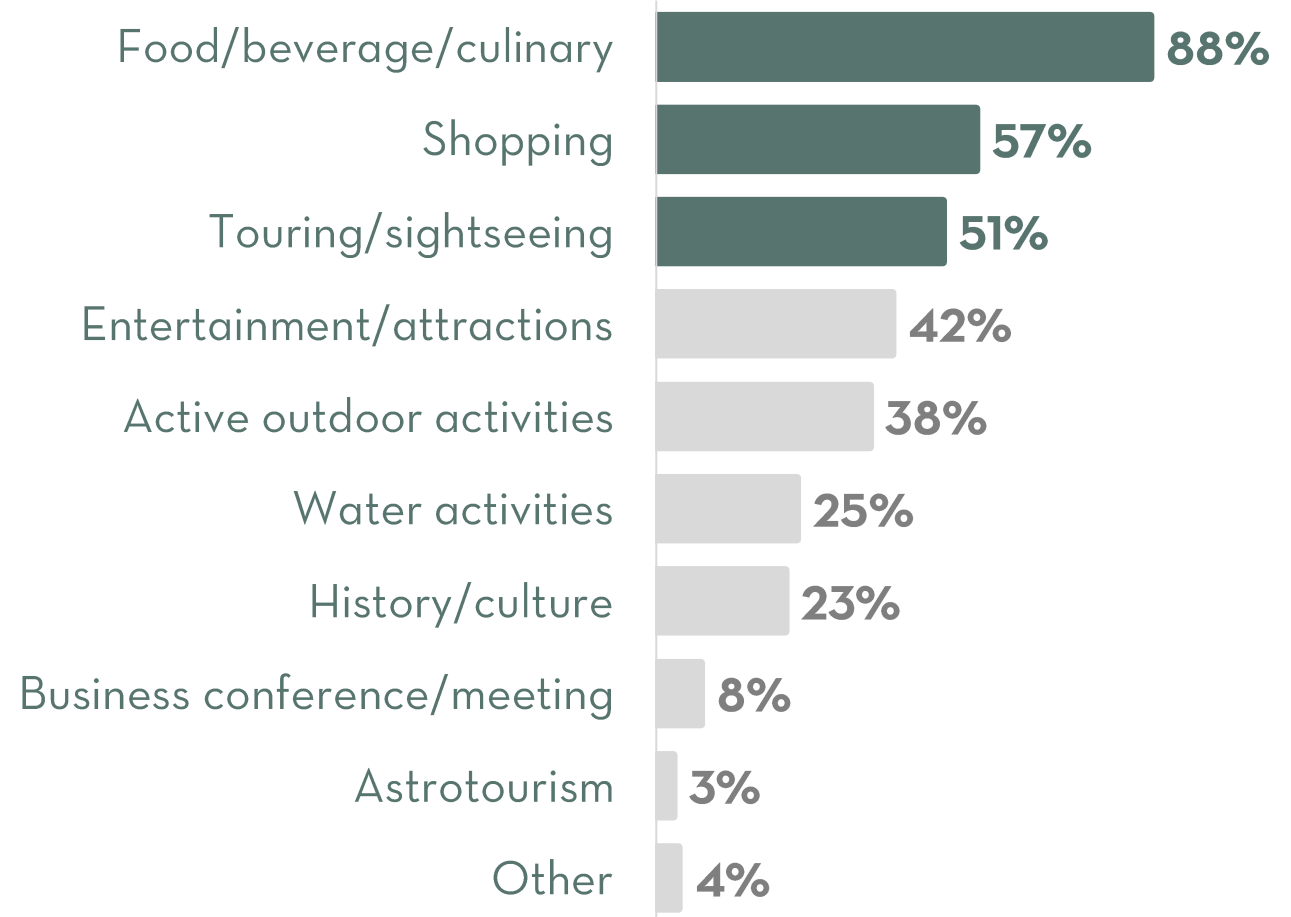
IN-MARKET VISITOR RESOURCES*

- » Visitors were more likely to rely on **navigation websites/apps** to plan activities in-market
- » Over **half** of visitors used a restaurant website or app
- » **1 in 10** visitors did not use any resources to plan activities while they were in Midcoast & Islands

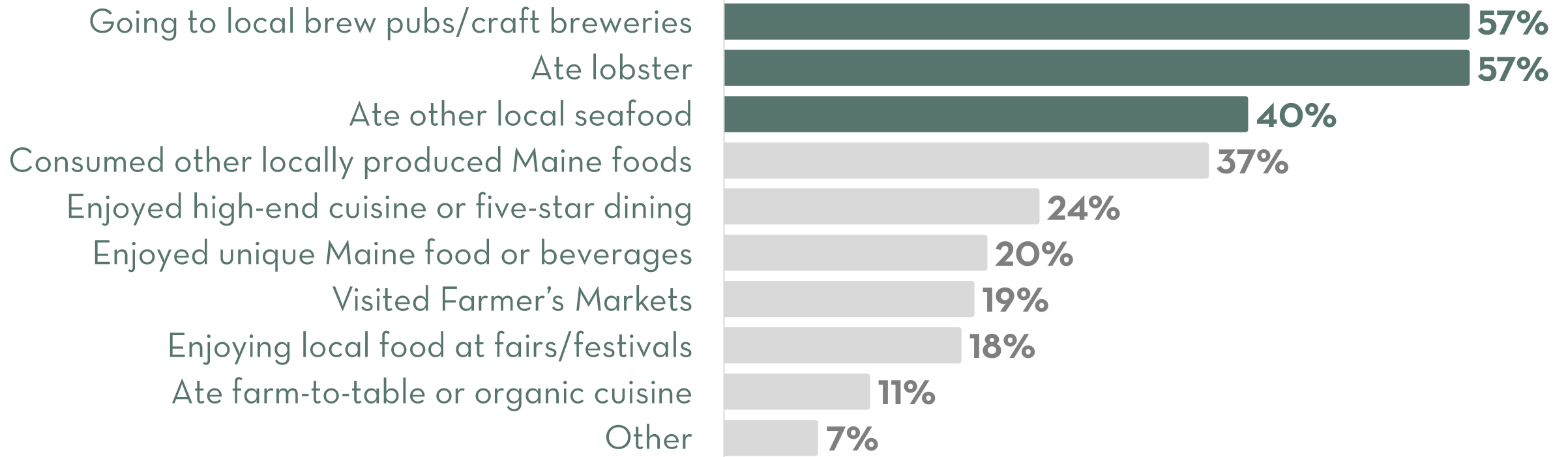


VISITOR ACTIVITIES*

- » Nearly **9 in 10** visitors engaged in food/beverage/culinary activities during their trip to Midcoast & Islands
- » Nearly **3 in 5** of visitors went shopping during their trip to Midcoast & Islands
- » Over **half** of visitors went touring/sightseeing during their trip to Midcoast & Islands

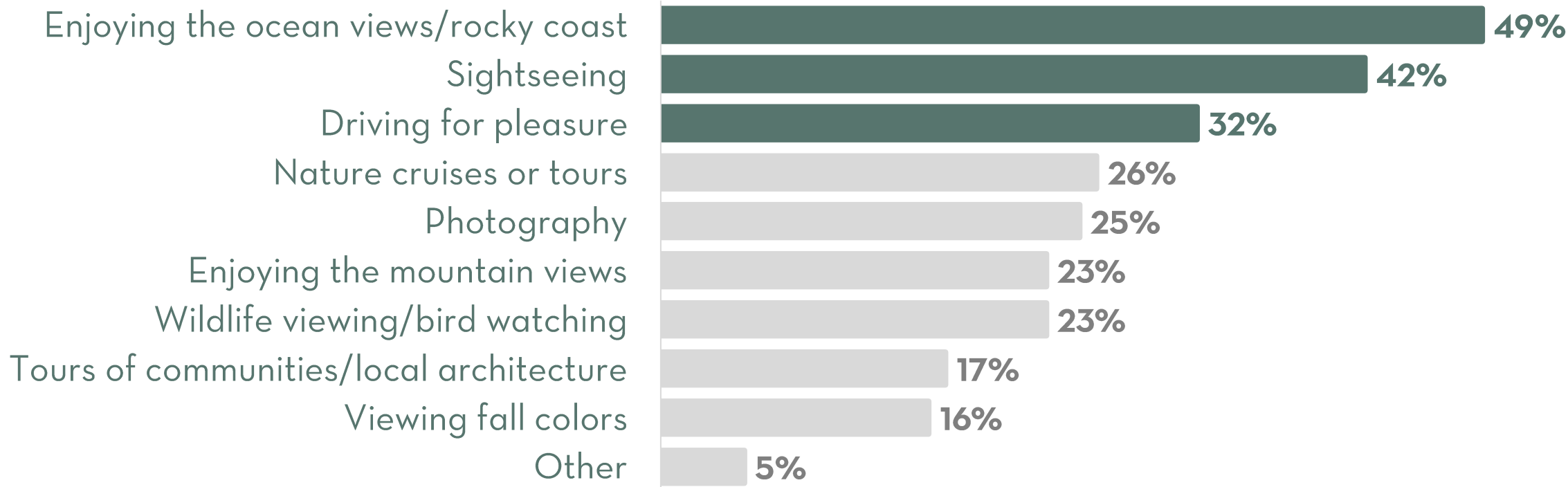


FOOD & BEVERAGE ACTIVITIES*



*Multiple responses permitted.

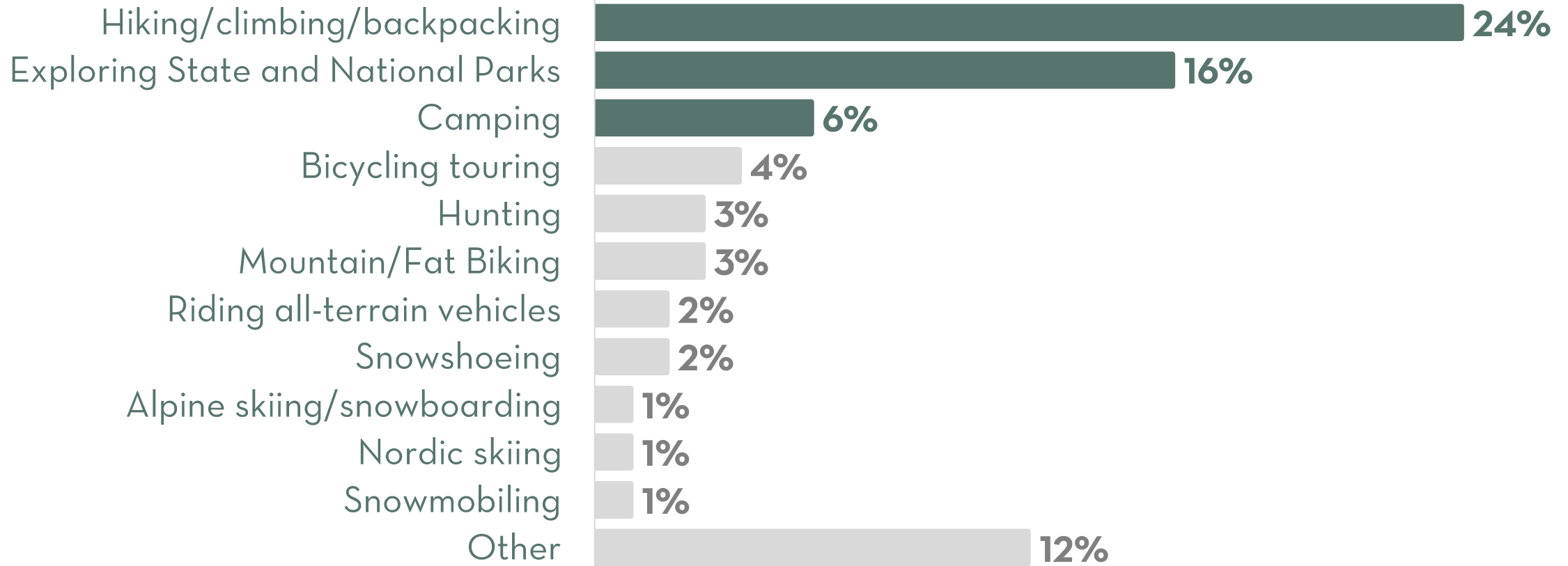
TOURING & SIGHTSEEING ACTIVITIES*



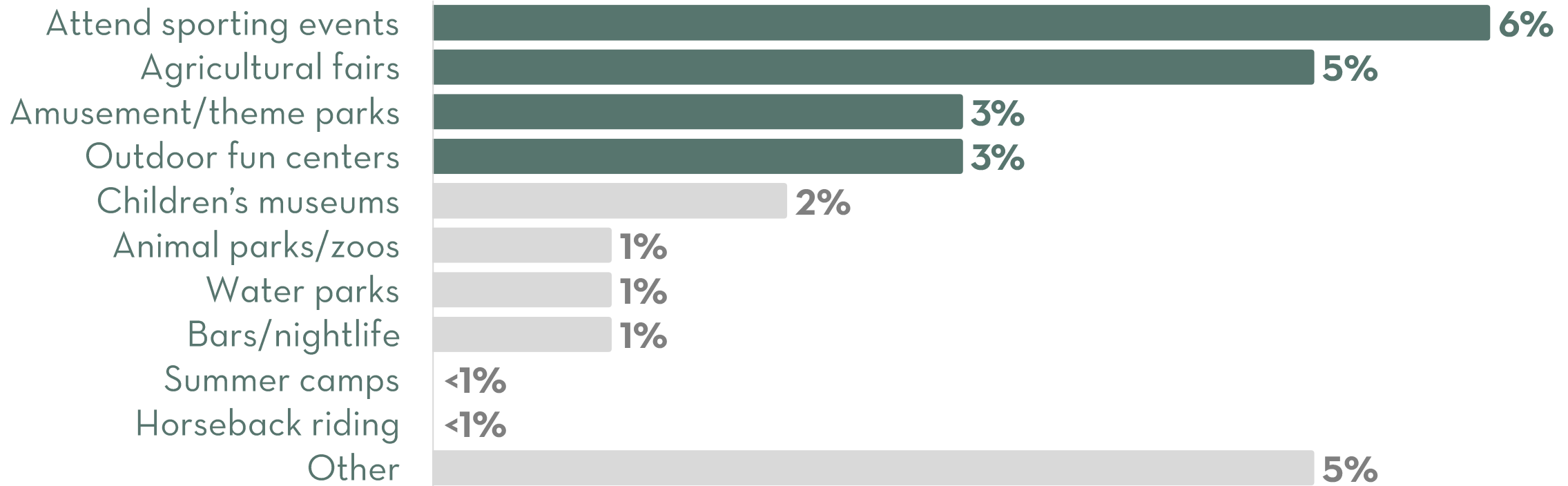
SHOPPING ACTIVITIES*



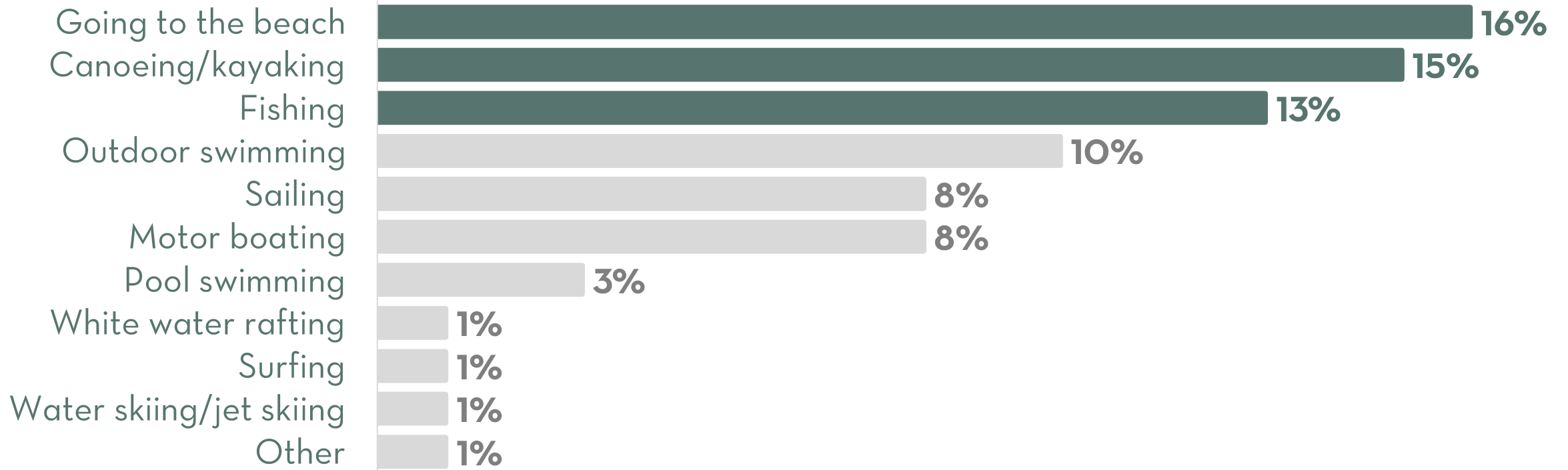
ACTIVE OUTDOOR ACTIVITIES*



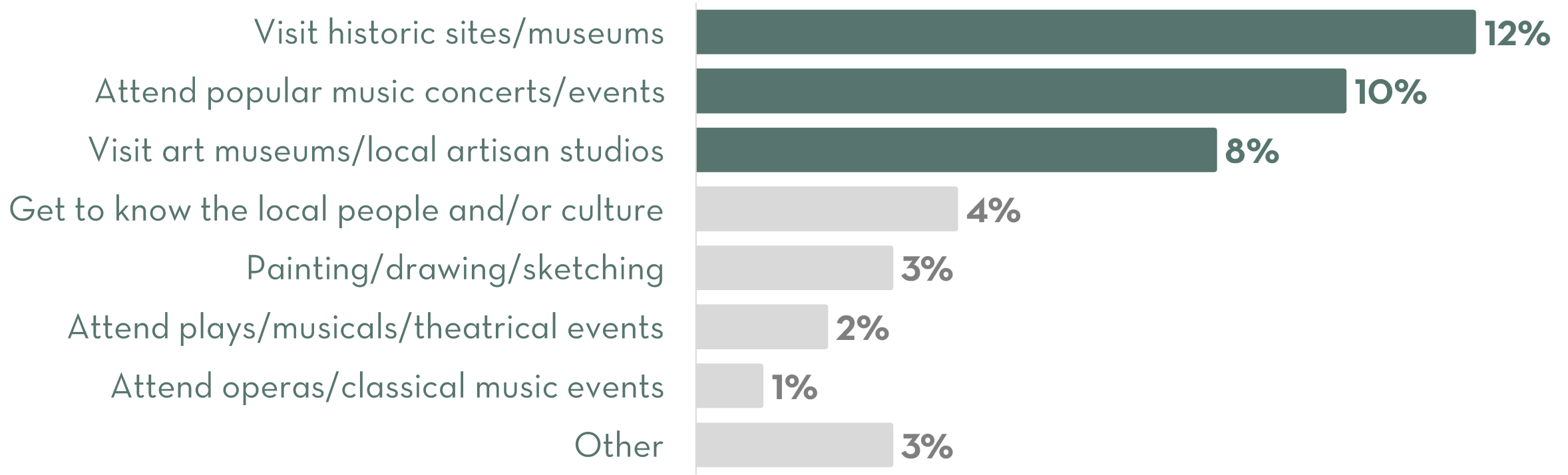
ENTERTAINMENT ACTIVITIES*



WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

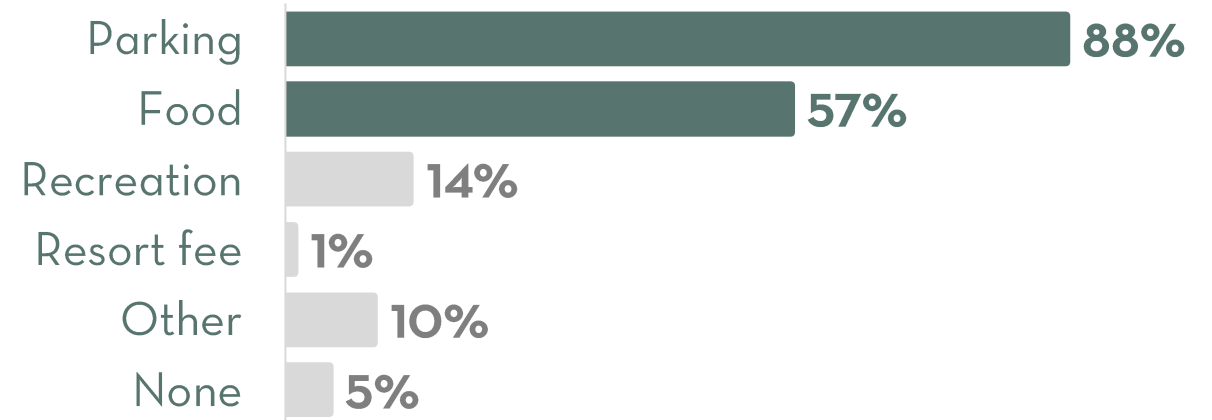
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$281	\$0	\$0
Restaurants	\$35	\$29	\$43
Groceries	\$29	\$38	\$9
Shopping	\$106	\$79	\$63
Activities & attractions	\$87	\$64	\$119
Transportation	\$52	\$36	\$33
Other	\$5	\$5	\$3
Daily Spending	\$595	\$251	\$270

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,434	\$0	\$0
Restaurants	\$178	\$208	\$43
Groceries	\$144	\$271	\$9
Shopping	\$545	\$570	\$63
Activities & attractions	\$438	\$458	\$119
Transportation	\$257	\$254	\$33
Other	\$23	\$35	\$3
Trip Spending	\$3,019	\$1,796	\$270

LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc. was included in the room price for **95%** of visitors
- » Price for accommodations included parking for nearly **9 in 10** visitors
- » Food was included in accommodations' pricing for nearly **3 in 5** visitors

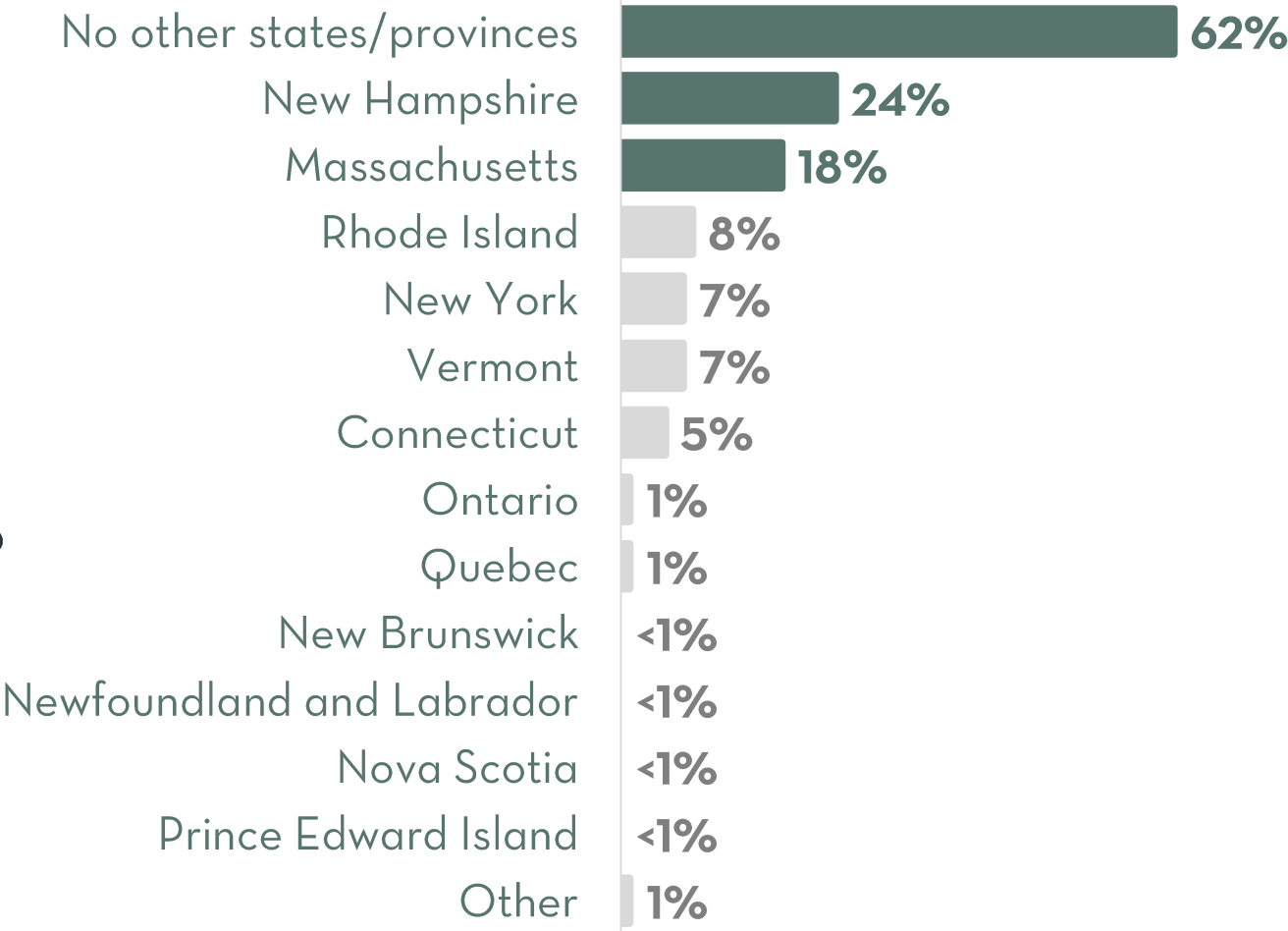


*Multiple responses permitted.

** Other includes access to Trolley/Shuttle, EV charging station, and tickets to the light show.

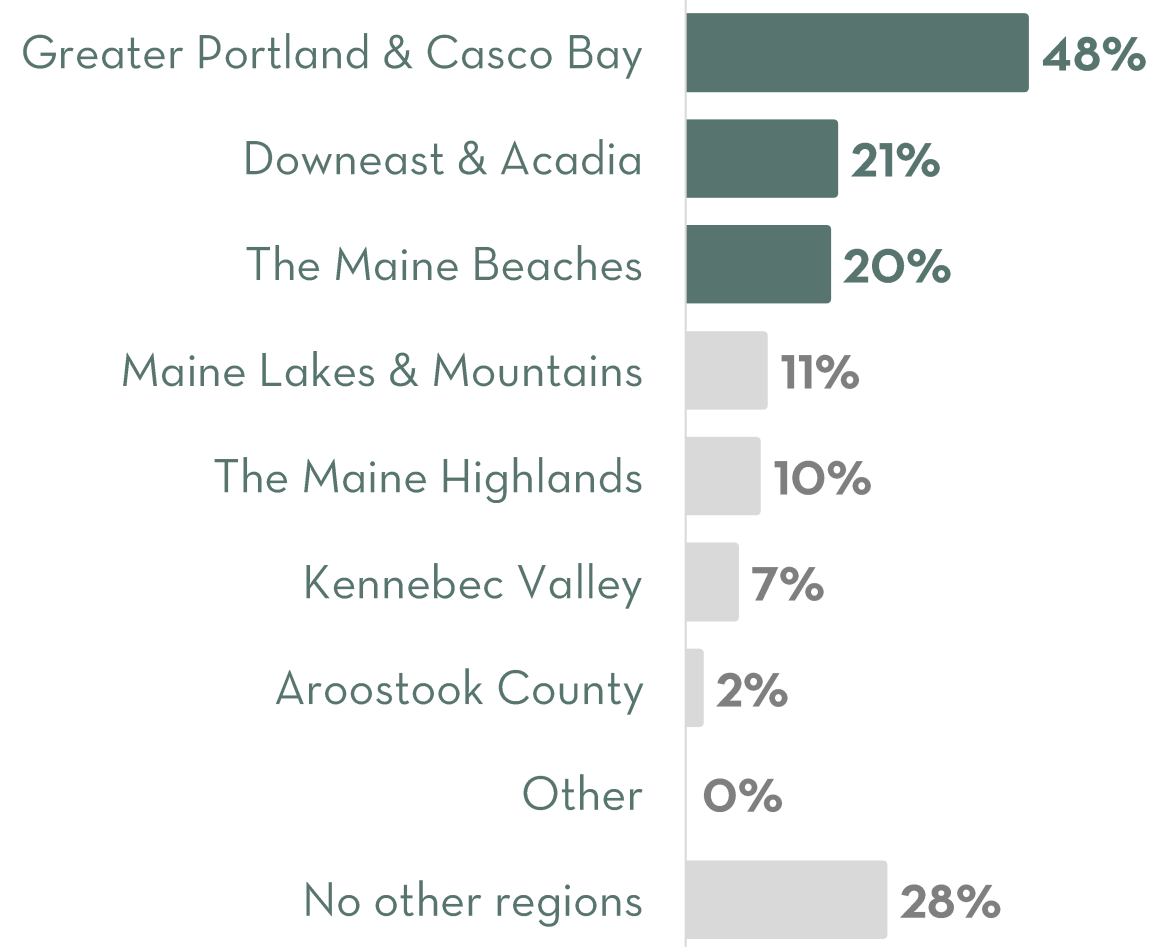
OTHER STATES & PROVINCES VISITED*

- » 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 Midcoast & Islands than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE*

- » Nearly **1 in 2** visitors to Midcoast & Islands traveled to the **Greater Portland and Casco Bay** region during their trip in Maine
- » Over **1 in 4** visitors stayed within Midcoast & Islands during their trip in Maine, rather than traveling throughout the state



TRIP PLANNING CYCLE : POST-TRIP EVALUATION

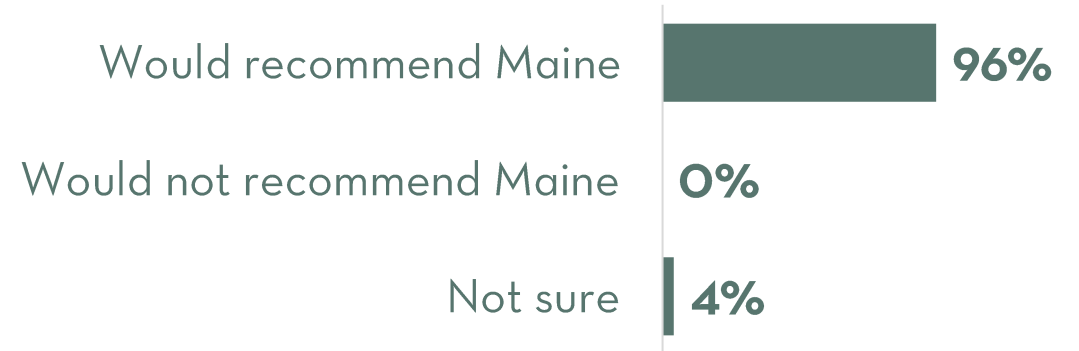


RECOMMENDING MAINE & ITS REGIONS

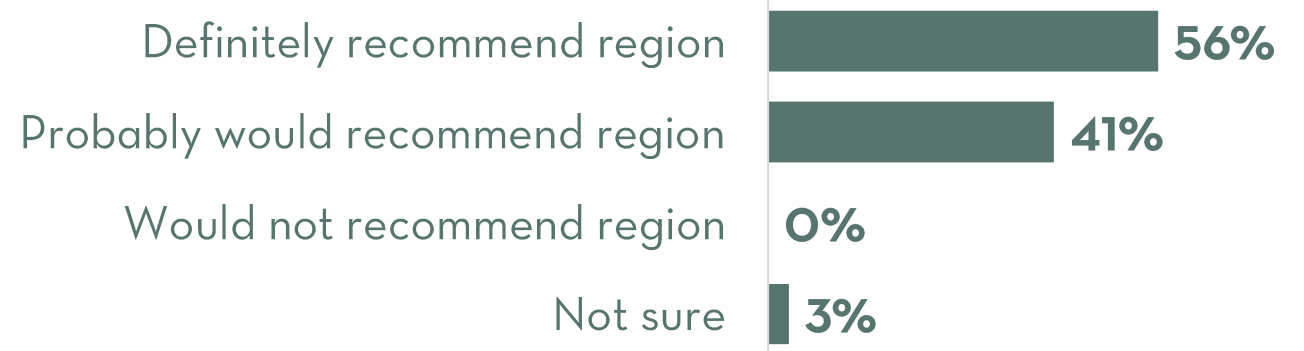
- » **96%** of visitors to Midcoast & Islands would recommend that their friends and family choose Maine as their destination for a future visit or vacation

- » **97%** of visitors would recommend that their friends and family visit Midcoast & Islands – **41%** would definitely recommend

Likelihood of Recommending Maine

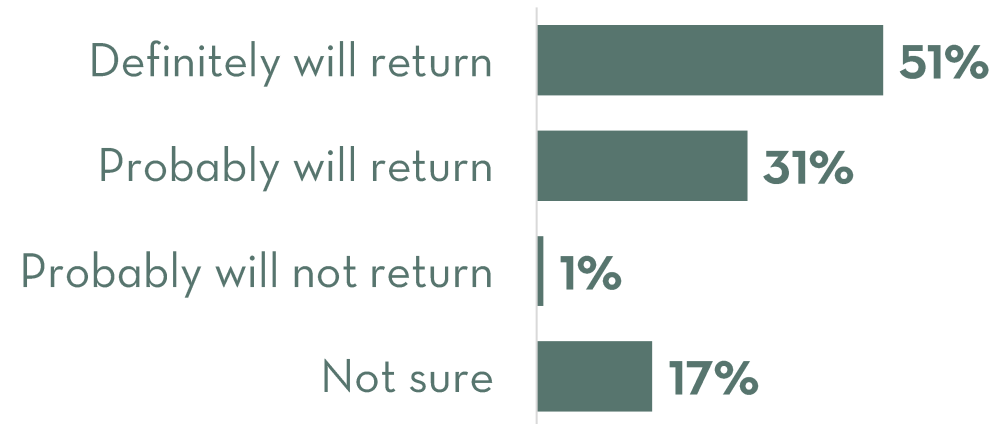


Likelihood of Recommending Region Visited



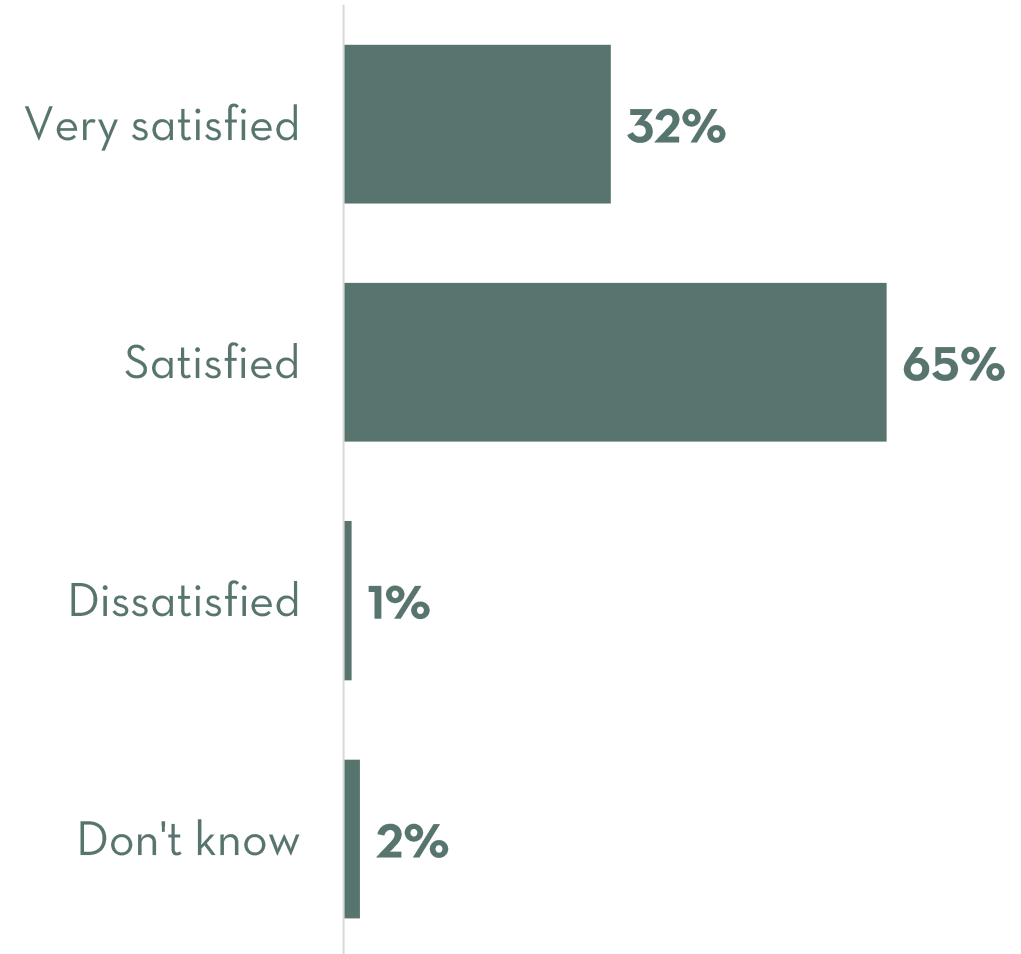
LIKELIHOOD OF RETURNING TO MAINE

- » **82%** of visitors to Midcoast & Islands will return to Maine for a future visit or vacation

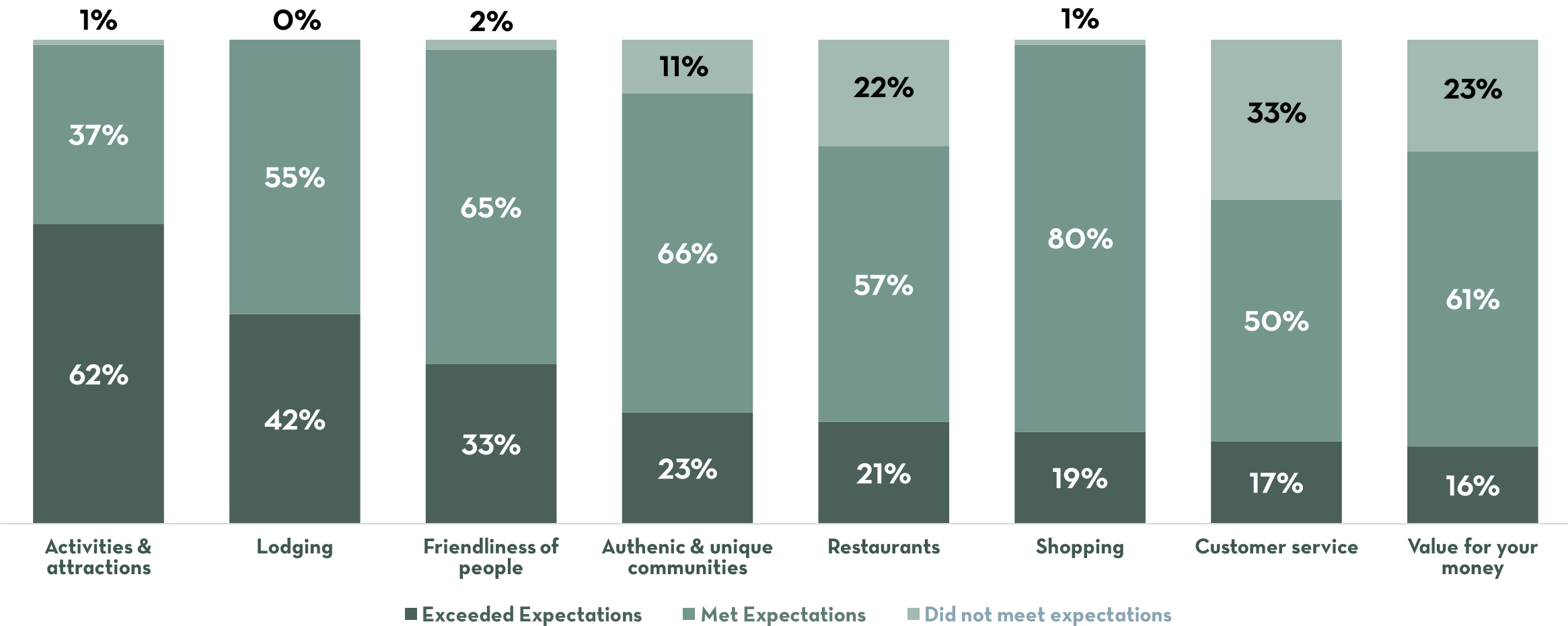


SATISFACTION

- » **97%** of visitors to Midcoast & Islands were satisfied with their trip to Maine
- » Over **3 in 5** visitors were very satisfied with their trip to Maine

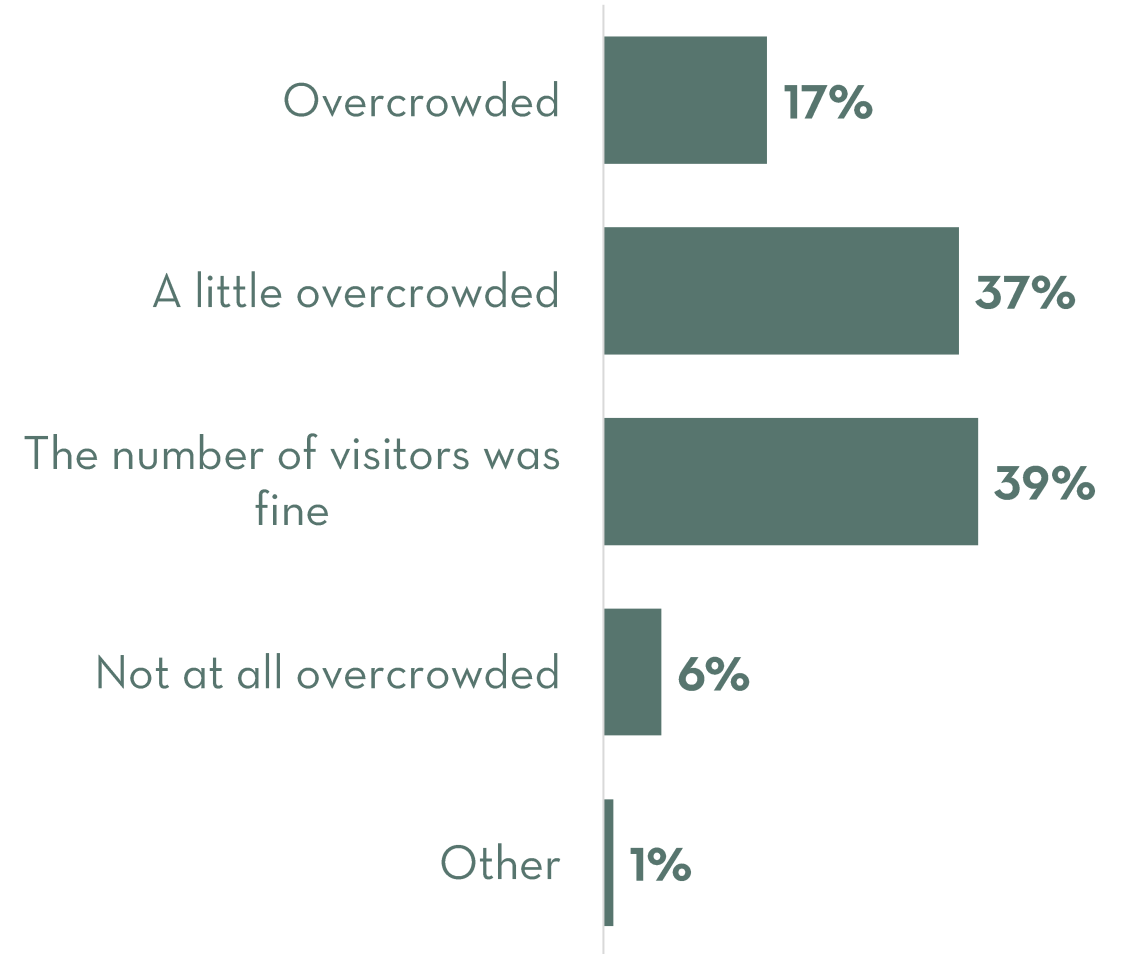


TRIP EXPECTATIONS



OVERCROWDING

- » **39%** of visitors to Midcoast & Islands thought the number of visitors during their trip was fine
- » **37%** 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	8%	7%
2 - 3 weeks	12%	15%
1 - 2 months	25%	28%
3 - 4 months	18%	17%
5 - 6 months	15%	16%
7 months - 1 year	14%	13%
More than 1 year	8%	4%
Days in Planning Cycle	68	60

Booking Window	2021	2022
A week or less	13%	12%
2 - 3 weeks	14%	17%
1 - 2 months	25%	28%
3 - 4 months	16%	15%
5 - 6 months	15%	15%
7 months - 1 year	12%	11%
More than 1 year	5%	2%
Days in Booking Window	58	53

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2021	2022
Online search engines	47%	54%
Hotel websites	20%	24%
Traveler reviews/blogs/stories	13%	24%
Facebook	9%	17%
Instagram	9%	17%
VisitMaine.com	15%	16%
Online travel agency	14%	13%
VRBO/HomeAway	11%	12%
Visit Maine social media	9%	11%
TripAdvisor	11%	10%
Airbnb	11%	10%
Vacation rental websites	10%	9%
YouTube	7%	8%
Airline websites	7%	6%
DiscoverNewEngland.com	4%	4%
MainesMidCoast.com	3%	4%
VisitPortland.com	3%	4%
MaineTourism.com	7%	4%
DowneastAcadia.com	3%	3%
TheMaineBeaches.com	1%	2%
MaineLakesandMountains.com	2%	2%
VisitBarHarbor.com	2%	2%
KennebecValley.org	1%	1%
TheMaineHighlands.com	1%	1%
Twitter	3%	1%
VisitAroostook.com	1%	<1%
Other	8%	5%
None	20%	18%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2021	2022
Advice from friends/family	46%	57%
Articles or travelogues	19%	38%
AAA	17%	26%
Travel planning apps	8%	9%
Travel guides/brochures	10%	7%
Called local Chambers of Commerce	2%	5%
Travel books & magazines	8%	5%
Called the Maine Office of Tourism	4%	3%
Visitor Guide	3%	2%
Visit Maine e-newsletter	2%	2%
Travel agent	3%	2%
Called local convention and visitors bureaus	2%	1%
Called another Maine Tourism/Lodging Association	2%	1%
Other	5%	4%
None	31%	20%

REASON FOR VISITING*

Reasons for Visiting	2021	2022
Visiting friends/relatives	30%	34%
Sightseeing/touring	34%	28%
Relax and unwind	41%	27%
Special occasion	15%	19%
Attractions	11%	16%
Special event	4%	16%
Shopping	8%	15%
Nature & bird watching	18%	14%
Active outdoor activities	10%	10%
Conference/meeting	2%	8%
Water activities	7%	7%
Culture/museums/history	4%	7%
Beach	8%	5%
Sporting event	1%	2%
Snow activities	1%	1%
Astrotourism	<1%	<1%
Other	1%	5%

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2021	2022
No other states/provinces	65%	57%
New Hampshire	18%	27%
Massachusetts	11%	18%
Vermont	11%	10%
Rhode Island	6%	10%
New York	6%	7%
Connecticut	3%	5%
New Brunswick	1%	1%
Newfoundland and Labrador	1%	1%
Nova Scotia	2%	1%
Ontario	1%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
Other	4%	2%

ADVERTISING/PROMOTIONS

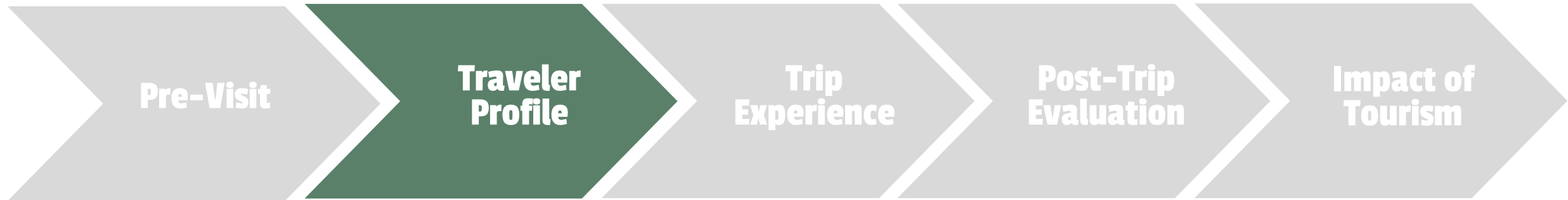
Recalled Advertising	2021	2022
Yes	53%	73%
No	31%	17%
Not sure	16%	10%

Influenced by Advertising	2021	2022
Yes	NA	51%

ADVERTISING/PROMOTIONS*

Sources of Advertising Noticed*	2021	2022
Social media	36%	45%
Internet	40%	39%
Magazine	25%	24%
Radio	10%	15%
AAA	7%	10%
Traveler reviews/blogs	11%	8%
Newspaper	8%	8%
VisitMaine.com	9%	7%
Cable or satellite television	12%	6%
Maine travel/visitor guide	7%	4%
Online streaming service	5%	3%
Brochure	5%	3%
Deal – based promotion	3%	2%
Billboard	3%	2%
Music/podcast streaming	4%	2%
Other	3%	1%
Not sure	2%	1%

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2021	2022
New England	27%	32%
Maine	13%	18%
Mid-Atlantic	28%	23%
Southeast	14%	10%
Midwest	10%	7%
Southwest	4%	3%
West	4%	4%
Canada	<1%	2%
International	<1%	1%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2021	2022
Maine	13%	18%
Massachusetts	13%	14%
New Hampshire	6%	8%
New York	10%	8%
Connecticut	5%	7%
New Jersey	5%	5%
Florida	6%	4%
Pennsylvania	5%	4%
Virginia	3%	3%
Maryland	3%	2%
Ohio	2%	2%
Rhode Island	1%	2%
Texas	2%	2%
Vermont	2%	2%
Arizona	1%	2%

ORIGIN MARKET

Origin Markets	2021	2022
Boston	7%	9%
New York City ¹	10%	9%
Washington DC – Baltimore ²	5%	4%
Philadelphia	3%	2%
Providence	1%	2%
Auburn-Lewiston	1%	2%
Augusta	1%	2%
Portland	1%	2%
Waterville	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	14%	13%
As a couple	51%	51%
As a family	25%	21%
With business associates	1%	2%
In a tour group	2%	2%
With other couples/friends	7%	11%
Other	<1%	<1%
Average Travel Party Size	2.8	3.0

TRAVEL WITH CHILDREN*

Children in Travel Party	2021	2022
No children	82%	82%
Children younger than 6	7%	6%
Children 6 – 12	9%	10%
Children 13 – 17	8%	8%

Gender	2021	2022
Male	44%	40%
Female	56%	60%

DEMOGRAPHIC PROFILE

Age	2021	2022
Under 25	3%	2%
25 – 34	12%	11%
35 – 44	24%	26%
45 – 54	19%	21%
55 – 65	26%	30%
Over 65	16%	10%
Median Age	51	50

Race/Ethnicity	2021	2022
White	88%	86%
Asian	4%	4%
Hispanic	<1%	<1%
Black	4%	3%
Indigenous	2%	2%
Other	2%	5%

LIFESTYLE PROFILE

Marital Status	2021	2022
Single/widowed	19%	20%
Married/living with partner	81%	80%

Employment Status	2021	2022
Employed full-time	46%	42%
Employed part-time	15%	19%
Contract/freelance/temporary employee	10%	13%
Retired	19%	13%
Not currently employed	6%	10%
Student	4%	3%

LIFESTYLE PROFILE

Household Income	2021	2022
Less than \$25,000	4%	3%
\$25,000 - \$49,999	11%	8%
\$50,000 - \$74,999	24%	30%
\$75,000 - \$99,999	22%	26%
\$100,000 - \$149,999	22%	21%
\$150,000 - \$199,999	10%	7%
\$200,000 - \$249,999	3%	2%
\$250,000 or more	4%	3%
Median Household Income	\$87,500	\$83,700

LIFESTYLE PROFILE

Educational Attainment	2021	2022
High school or less	5%	3%
Some college or technical school	15%	14%
College or technical school graduate	58%	70%
Graduate school	22%	13%

NEW & RETURNING VISITORS

Previous Trips to Maine	2021	2022
This is my first time	29%	23%
2 - 5 times	30%	34%
6 - 10 times	17%	24%
11+ times	24%	19%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2021	2022
Drove to Maine	73%	82%
Flew into Portland Intl Jetport	13%	7%
Flew into Boston Logan Intl	4%	4%
Flew into Bangor Intl Airport	4%	1%
Took a motor coach tour or bus	3%	3%
Traveled by train	<1%	<1%
Other	1%	1%

LENGTH OF STAY

Nights Stayed	2021	2022
Not staying overnight	19%	14%
1 night	3%	4%
2 nights	6%	10%
3 nights	15%	19%
4 nights	15%	17%
5+ nights	42%	36%
Average Length of Stay	4.2	5.0

ACCOMMODATIONS

Accommodations	2021	2022
Hotel/motel/resort	29%	29%
Friends/family home	13%	19%
Vacation rental home	13%	14%
Personal second home	6%	7%
Bed & Breakfast/Inn	9%	7%
Campground/RV Park	5%	5%
Wilderness camping	2%	2%
Sporting camp/wilderness lodge	1%	1%
Outdoor Outfitter	1%	<1%
Other	2%	2%
Not spending the night	19%	14%

BOOKING

Booking Methods	2021	2022
Directly with the hotel/condo	46%	43%
Online travel agency	16%	21%
Airbnb	10%	10%
Short term rental service	8%	10%
Vacation rental company	7%	6%
Group tour operator	3%	3%
Offline travel agent	1%	1%
Travel package provider	1%	1%
Other	8%	5%

IN-MARKET RESOURCES*

In-Market Resources	2021	2022
Navigation website/apps	55%	59%
Restaurant website/app	31%	54%
Personal social media	17%	35%
Materials from hotel/campground	21%	23%
Visitor Information Centers	21%	13%
Destination social media	12%	10%
Trip planning app	10%	9%
VisitMaine.com	9%	8%
Hotel/resort website/app	12%	8%
Chambers of Commerce	8%	8%
Booking website/app	5%	3%
Airline website/app	3%	2%
Other	8%	9%
None	15%	10%

ACTIVITIES*

Activities	2021	2022
Food/beverage/culinary	80%	88%
Shopping	48%	57%
Touring/sightseeing	64%	51%
Entertainment/attractions	23%	42%
Active outdoor activities	41%	38%
Water activities	32%	25%
History/culture	21%	23%
Business conference/meeting	2%	8%
Astrotourism	3%	3%
Other	2%	4%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2021	2022
Going to local brew pubs/craft breweries	34%	57%
Ate lobster	46%	57%
Ate other local seafood	40%	40%
Consumed other locally produced Maine foods	27%	37%
Enjoyed high-end cuisine or five-star dining	17%	24%
Enjoyed unique Maine food or beverages	17%	20%
Visited Farmer's Markets	8%	19%
Enjoying local food at fairs/festivals	7%	18%
Ate farm-to-table or organic cuisine	13%	11%
Other	5%	7%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2021	2022
Enjoying the ocean views/rocky coast	70%	49%
Sightseeing	53%	42%
Driving for pleasure	47%	32%
Nature cruises or tours	38%	26%
Photography	33%	25%
Enjoying the mountain views	33%	23%
Wildlife viewing/bird watching	26%	23%
Tours of communities/local architecture	20%	17%
Viewing fall colors	23%	16%
Other	3%	5%

SHOPPING ACTIVITIES*

Shopping Activities	2021	2022
Shopping in downtown areas	14%	34%
Shopping for gifts/souvenirs	19%	32%
Outlet shopping	17%	29%
Shopping for unique/locally produced goods	17%	28%
Shopping for antiques/local arts and crafts	12%	25%
Shopping for “Made in Maine” products	14%	24%
Shopping at malls	6%	4%
Other	1%	5%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2021	2022
Hiking/climbing/backpacking	33%	24%
Exploring State and National Parks	25%	16%
Camping	9%	6%
Bicycling touring	5%	4%
Hunting	3%	3%
Mountain/Fat Biking	4%	3%
Riding all-terrain vehicles	3%	2%
Snowshoeing	2%	2%
Alpine skiing/snowboarding	2%	1%
Nordic skiing	1%	1%
Snowmobiling	2%	1%
Other	5%	12%

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2021	2022
Agricultural fairs	1%	6%
Outdoor fun centers	1%	5%
Bars/nightlife	2%	3%
Amusement/theme parks	2%	3%
Animal parks/zoos	1%	2%
Water parks	1%	1%
Summer camps	1%	1%
Children's museums	1%	1%
Horseback riding	<1%	<1%
Attend sporting events	1%	<1%
Other	19%	5%

WATER ACTIVITIES*

Water Activities	2021	2022
Going to the beach	23%	16%
Canoeing/kayaking	21%	15%
Fishing	19%	13%
Outdoor swimming	18%	10%
Sailing	13%	8%
Motor boating	12%	8%
Pool swimming	3%	3%
White water rafting	2%	1%
Surfing	1%	1%
Water skiing/jet skiing	2%	1%
Other	2%	1%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2021	2022
Visit historic sites/museums	20%	12%
Attend popular music concerts/events	2%	10%
Visit art museums/local artisan studios	13%	8%
Get to know the local people and/or culture	8%	4%
Painting/drawing/sketching	4%	3%
Attend plays/musicals/theatrical events	3%	2%
Attend operas/classical music events	2%	1%
Other	2%	3%

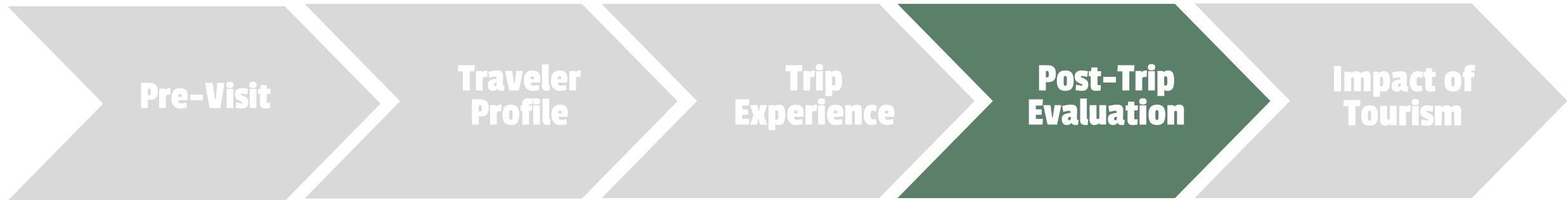
OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2021	2022
No other states/provinces	66%	62%
New Hampshire	21%	24%
Massachusetts	14%	18%
Rhode Island	5%	8%
New York	8%	7%
Vermont	7%	7%
Connecticut	5%	5%
Ontario	1%	1%
Quebec	1%	1%
New Brunswick	<1%	<1%
Newfoundland and Labrador	<1%	<1%
Nova Scotia	1%	<1%
Prince Edward Island	<1%	<1%
Other	3%	1%

TRAVELING IN MAINE*

Midcoast & Islands Regions Visited	2021	2022
Midcoast & Islands	100%	100%
Greater Portland & Casco Bay	47%	48%
Downeast & Acadia	30%	21%
The Maine Beaches	28%	20%
Maine Lakes & Mountains	12%	11%
The Maine Highlands	13%	10%
Kennebec Valley	12%	7%
Aroostook County	3%	2%
No other regions	24%	28%

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2021	2022
Would recommend Maine	97%	96%
Would not recommend Maine	0%	0%
Not sure	3%	4%

Recommending Regions	2021	2022
Definitely recommend region	73%	56%
Probably would recommend region	21%	41%
Would not recommend region	1%	0%
Not sure	5%	3%

SATISFACTION

Satisfaction	2021	2022
Very satisfied	NA	32%
Satisfied	NA	65%
Dissatisfied	NA	1%
Don't know	NA	2%

RETURNING TO MAINE

Returning to Maine	2021	2022
Definitely will return	64%	51%
Probably will return	20%	31%
Probably will not return	1%	1%
Not sure	15%	17%

TRIP EXPECTATIONS

Exceeded Expectations	2021	2022
Activities & attractions	49%	62%
Lodging	37%	42%
Friendliness of people	40%	33%
Authentic & unique communities	36%	23%
Restaurants	33%	21%
Shopping	26%	19%
Customer service	28%	17%
Value for your money	24%	16%

OVERCROWDING

Overcrowding	2021	2022
Overcrowded	NA	17%
A little overcrowded	NA	37%
The number of visitors was fine	NA	39%
Not at all overcrowded	NA	6%
Other	NA	1%

STUDY METHODS



METHODOLOGY



Visitor Tracking

731 interviews were completed with visitors to the Midcoast & Islands 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 the Midcoast & Islands is a function of direct spending by visitors to Midcoast & Islands, 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 Midcoast & Islands. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Midcoast & Island's multiplier is 1.50.

MIDCOAST & ISLANDS

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022

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

