

MAINE HIGHLANDS

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022



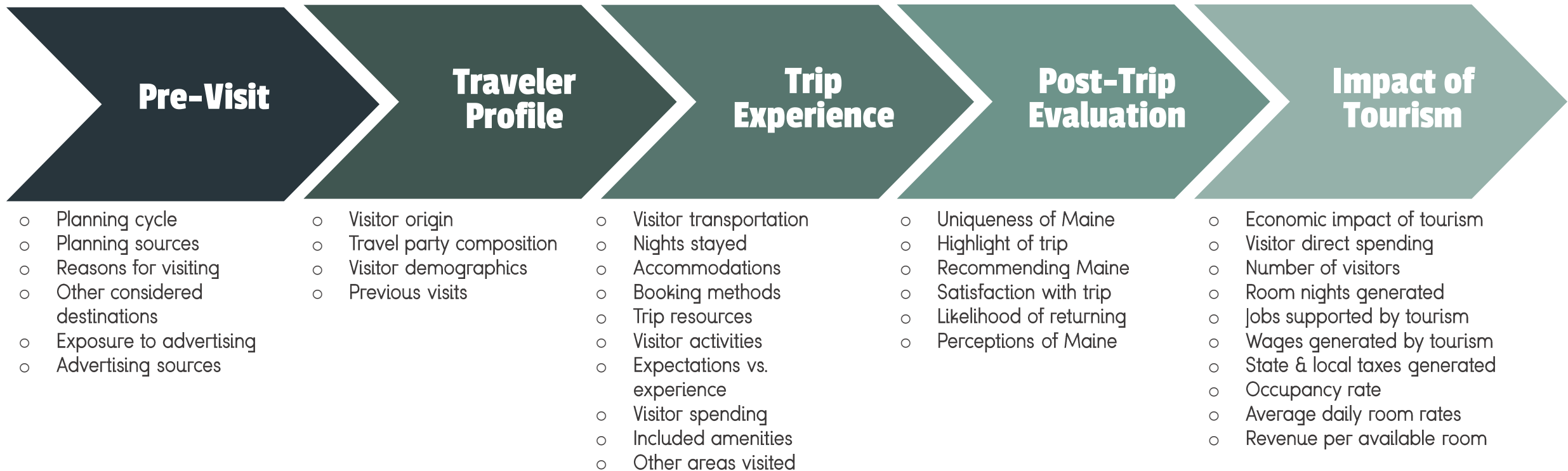
INTRODUCTION



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to the Maine Highlands 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 the Maine Highlands.



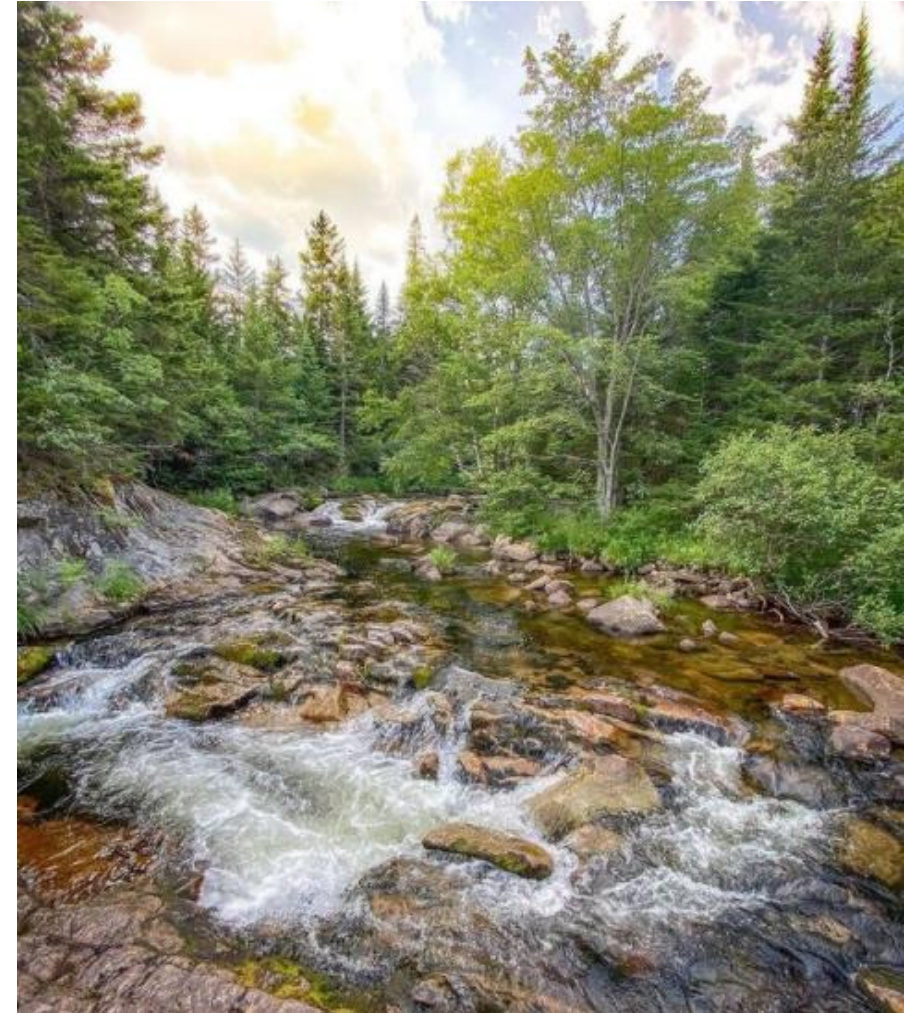
EXECUTIVE SUMMARY



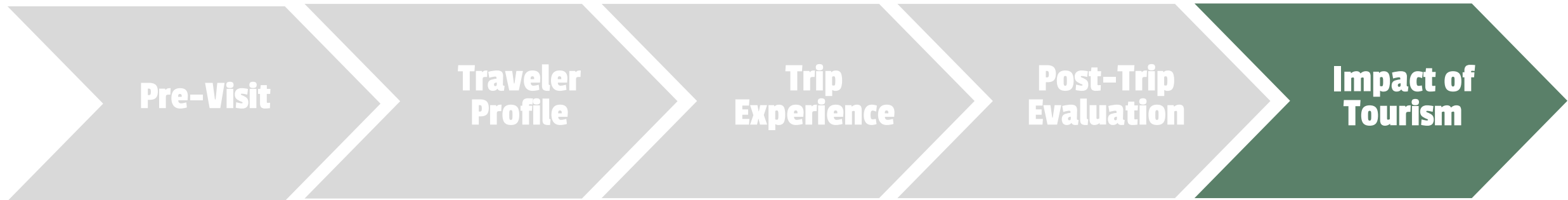
THE MAINE HIGHLANDS

Compared to visitors to other regions, visitors to the Maine Highlands region are more likely to:

- » Be from the Southeast U.S.
- » Travel alone
- » Be very satisfied with their trip to Maine
- » Believe the value for their money exceeded expectations
- » Believe the region is less crowded
- » Have a longer length of stay



TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,006,035,200

in economic impact to the Maine Highlands' economy, up **14.5%** from 2021



DIRECT SPENDING

Visitors to the Maine Highlands spent

\$619,720,700

throughout the county in 2022 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **15.0%** from 2021



VISITORS

the Maine Highlands attracted

876,000

visitors in 2022, down **3.4%** from 2021



VISITORS DAYS*

All visitors to the Maine Highlands spent

5,845,700

days in the Maine Highlands 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 the Maine Highlands generated

1,980,400

nights in the Maine Highlands accommodations
throughout 2022, up **26.9%** from 2021



JOBS SUPPORTED

Visitors to the Maine Highlands supported
the creation of

10,300

jobs throughout the county in 2022, up
9.6% from 2021



WAGES GENERATED

Visitors to the Maine Highlands supported

\$339,192,700

in wages paid to the Maine Highlands employees in 2022, up **14.6%** from 2021



VISITORS & JOBS

Every

85

visitors supports a new job in the Maine
Highlands



HOUSEHOLD SAVINGS

Visitors to the Maine Highlands saved local households

\$1,199

in state and local taxes in 2022



LODGING METRICS

Occupancy Rate

51.7%

+ 19.4% from 2021

Average Daily Rate

\$153.34

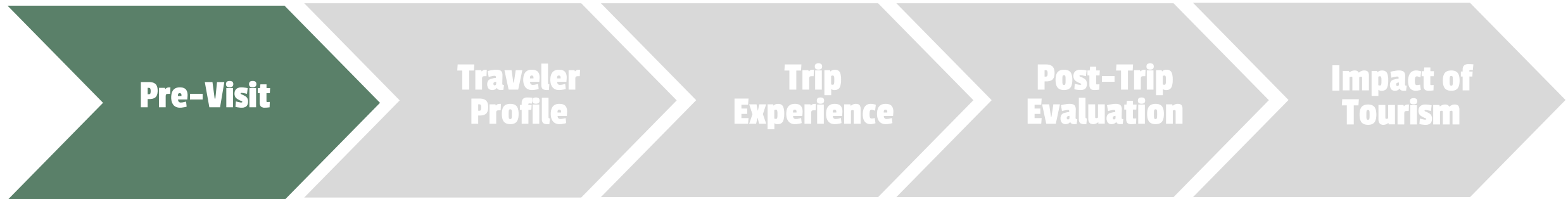
+ 10.8% from 2021

Revenue per Available Room

\$79.28

+ 32.3% from 2021

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » **69%** 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

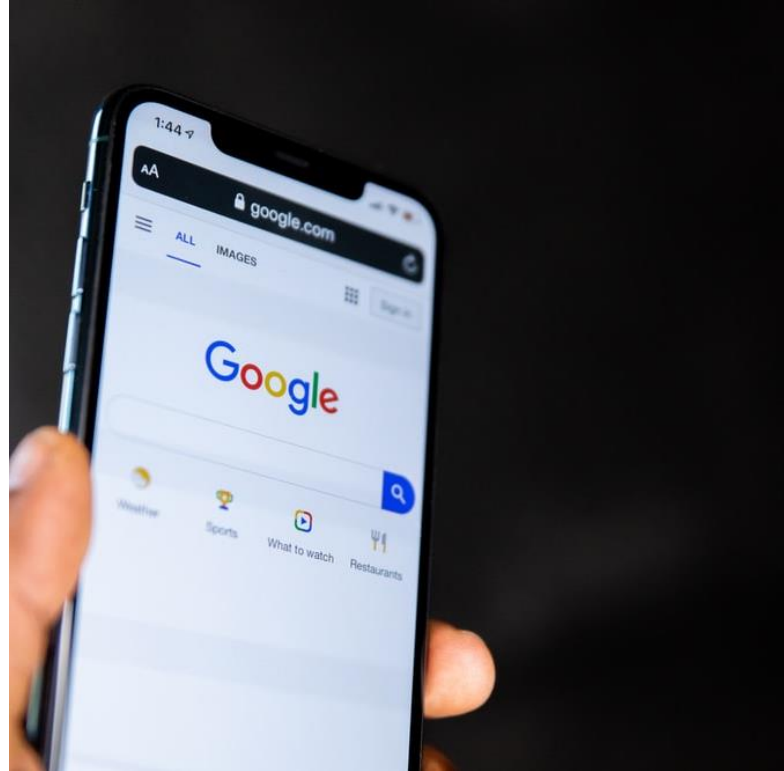


TOP TRIP PLANNING SOURCES*

Over **7 in 10** visitors used one or more online resources to help them plan their trip in the Maine Highlands



33% Advice from friends/family



26% Online search engines



17% Airline Websites

*Multiple responses permitted.

TOP REASONS FOR VISITING*



31% Visiting friends/family



27% Relax and unwind



25% Sightseeing/touring

*Multiple responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » **72%** of visitors did not consider visiting any U.S. state or Canadian province instead of the Maine Highlands 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

- » **35%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to the Maine Highlands (**-3%** points from 2021)
- » This information influenced **17%** of all visitors to visit Maine



TOP SOURCES OF ADVERTISING EXPOSURE*

Base: 35% who noticed advertising



38% Social media



37% Internet

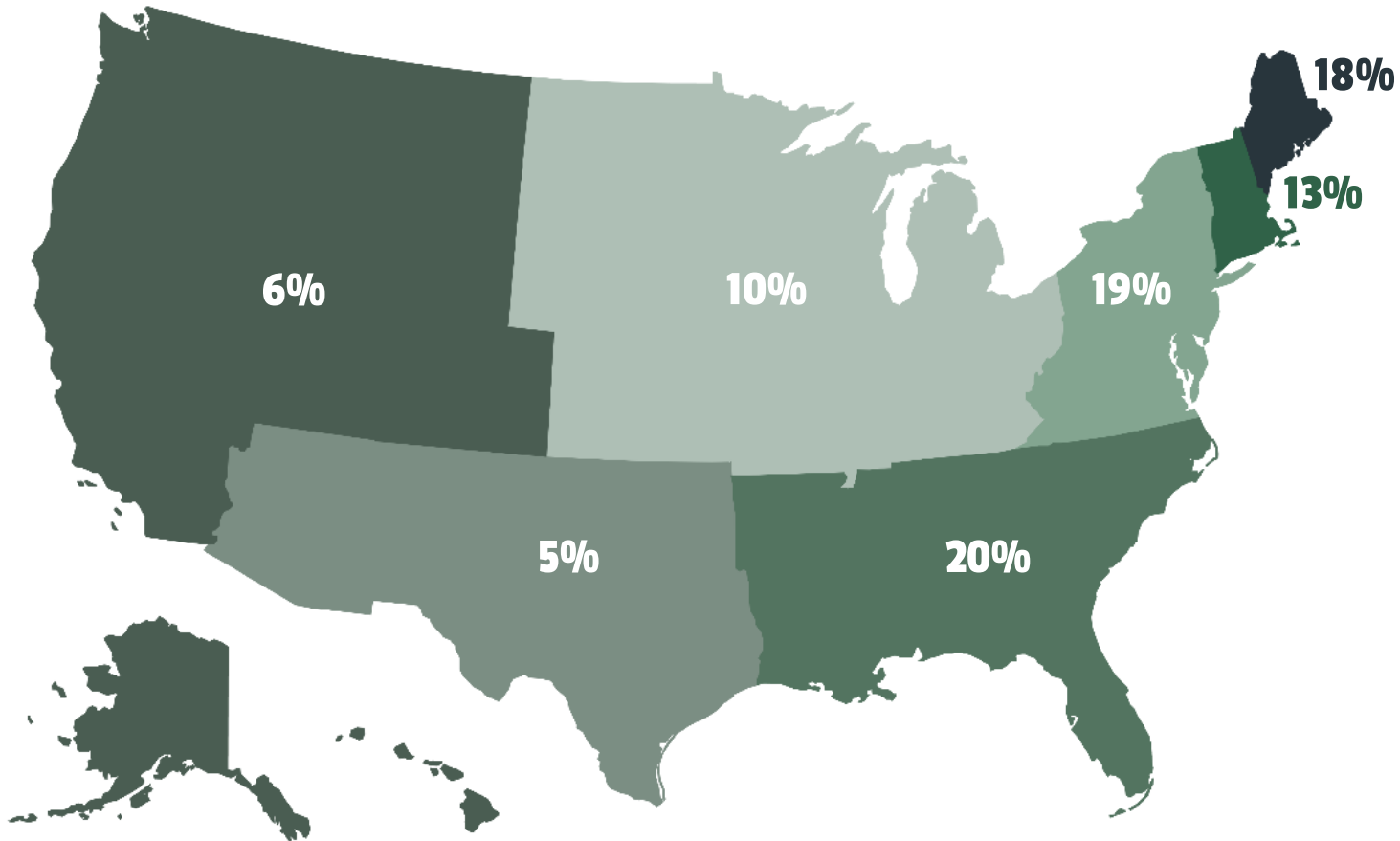
*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN

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

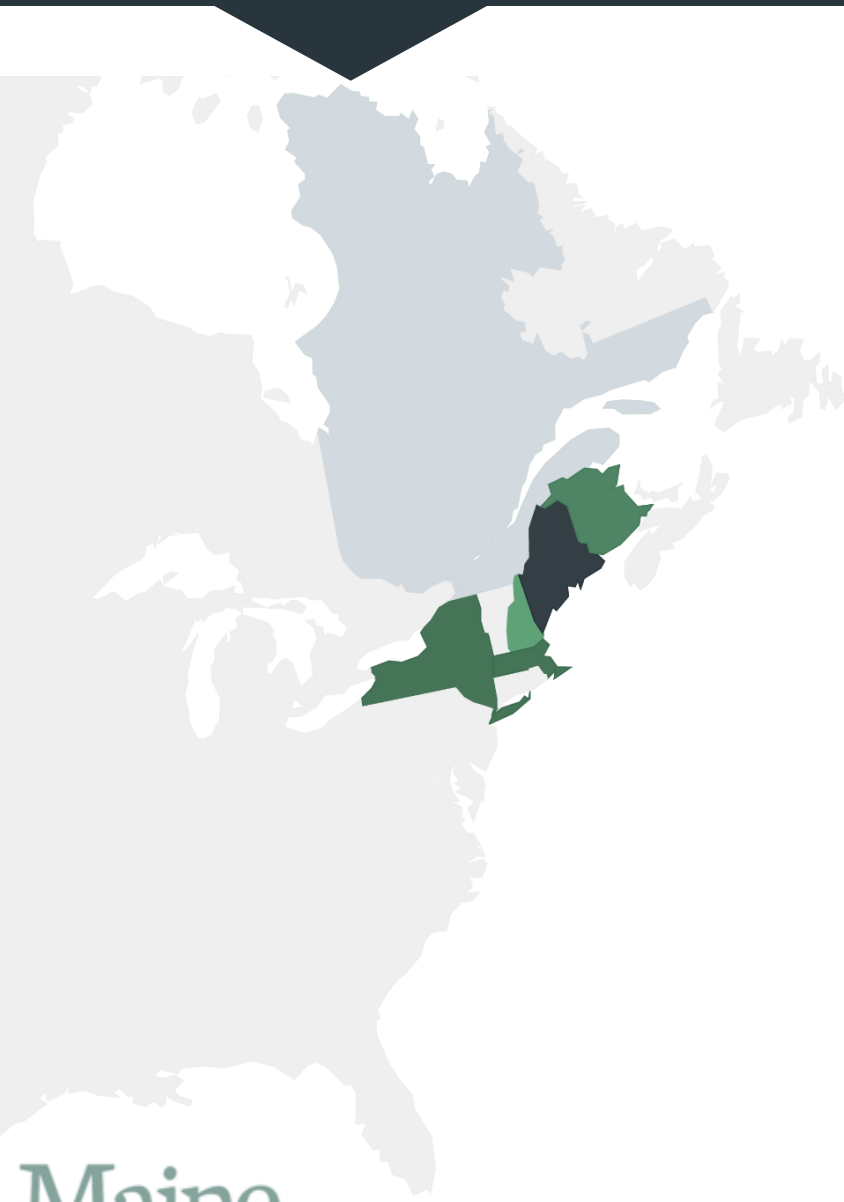


2% of visitors came from outside of the United States and Canada.



7% of visitors came Canada.

TOP ORIGIN STATES & PROVINCES



44%

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

- 18** % Maine
- 9** % Florida
- 6** % Massachusetts
- 6** % New York
- 5** % New Brunswick

TOP ORIGIN MARKETS



7% New York City¹



5% Washington D.C. – Baltimore²



3% Boston

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

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

TRAVEL PARTIES

The typical the Maine Highlands visitor traveled with **2.5** people in their visitor party



24% visitors traveled with at least one person under the age of 18 in their travel party



DEMOGRAPHIC PROFILE

» The typical Maine Highlands visitor:

- » Is **48** years old¹
- » Male² - **51%**
- » Is white - **87%**



¹Median age.

²Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Maine Highlands visitor:
 - » Is a college graduate - **72%**
 - » Is married/in a domestic partnership - **71%**
 - » Is employed full-time - **58%**
 - » Has an annual household income¹ of **\$100,000**



¹Median household income.

NEW & RETURNING VISITORS

- » **27%** of visitors to the Maine Highlands were traveling in Maine for the first time
- » **34%** of visitors to the Maine Highlands had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **74%** of visitors drove to the Maine Highlands
- » **14%** of visitors to the Maine Highlands flew to Maine through Bangor International Airport



NIGHTS STAYED

- » **89%** of visitors spent one or more nights in the Maine Highlands
- » Typical visitors stayed **6.8*** nights in the Maine Highlands on their trip



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

TOP ACCOMMODATIONS



27% Hotel/motel/resort



22% Friends/family home



11% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*

Over **3 in 5** visitors used one or more in-market resources to help them plan places to go while in the Maine Highlands



33% Navigation websites/apps



18% Restaurant website/app



15% Personal Social Media

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



59% Food/beverage/ culinary



48% Touring/sightseeing



45% Active outdoor activities

*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in the Maine Highlands spent **\$555** per day and **\$3,432** during their trip
- » Visitors who stayed overnight in unpaid accommodations in the Maine Highlands spent **\$213** per day and **\$1,837** during their trip
- » Visitors who did not stay overnight in the Maine Highlands spent **\$164** during their trip



VISITING OTHER STATES & PROVINCES

- » Nearly **4 in 5** visitors to the Maine Highlands did not visit any other U.S. state or Canadian province
- » the Maine Highlands 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 **7 in 10** visitors to the Maine Highlands traveled to other regions during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **95%** of visitors to the Maine Highlands would recommend Maine to a friend or relative as a vacation destination
- » **87%** of visitors to the Maine Highlands would recommend that their friends and family visit the region
 - » **71%** would definitely recommend the Maine Highlands



LIKELIHOOD OF RETURNING TO MAINE

- » **93%** of visitors to the Maine Highlands will return to Maine for a future visit or vacation
- » **75%** of visitors will “definitely return” to Maine in the future



SATISFACTION

- » **95%** of visitors were satisfied with their trip to the Maine Highlands



OVERCROWDING

- » **43%** of visitors thought the number of visitors during their trip to the Maine Highlands was fine
- » **15%** 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	907,200	876,000	- 3.4%
Room nights generated	755,800	952,000	+ 26.0%
Direct expenditures	\$538,820,900	\$619,720,700	+ 15.0%
Total economic impact	\$878,932,700	\$1,006,035,200	+ 14.5%

EMPLOYMENT IMPACTS

Maine Highlands Jobs	2021	2022	Δ% from '21
Jobs generated (direct)	7,100	7,700	+ 8.5%
Total employment impact	9,400	10,300	+ 9.6%

Maine Highlands Wages	2021	2022	Δ% from '21
Wages paid (direct)	\$195,111,700	\$223,940,200	+ 14.8%
Total impact on wages	\$296,048,200	\$339,192,700	+ 14.6%

RETURN ON INVESTMENT

Return on Investment	2021	2022
Visitors per job supported	97	85
State & local taxes supported	\$75,152,700	\$83,945,900
Tax savings per household	\$1,086	\$1,199

LODGING METRICS

Lodging Metrics	2021*	2022	Δ% from '21
Occupancy Rate (%)	43.3%	51.7%	+ 19.4%
Average Daily Rate	\$138.36	\$153.34	+ 10.8%
RevPAR	\$59.91	\$79.28	+ 32.3%
Total Lodging Revenue	\$115,576,100	\$156,182,300	+ 35.1%

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

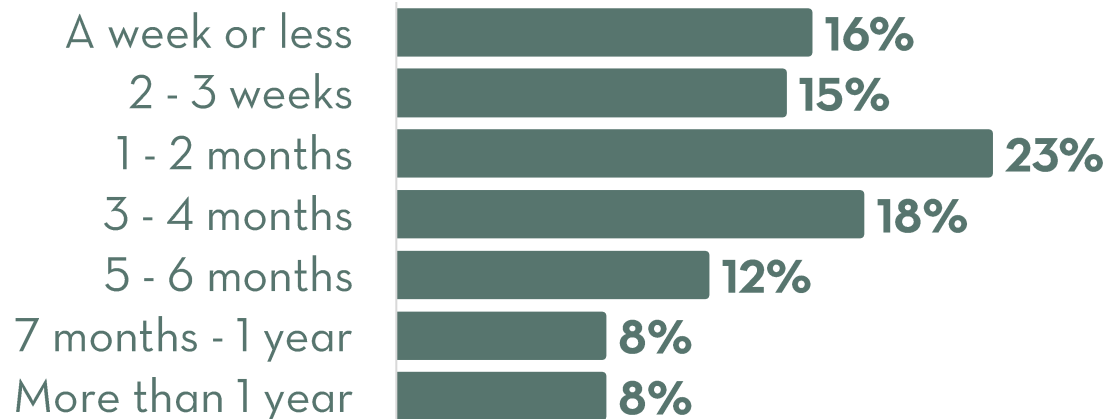
TRIP PLANNING CYCLE : PRE-VISIT



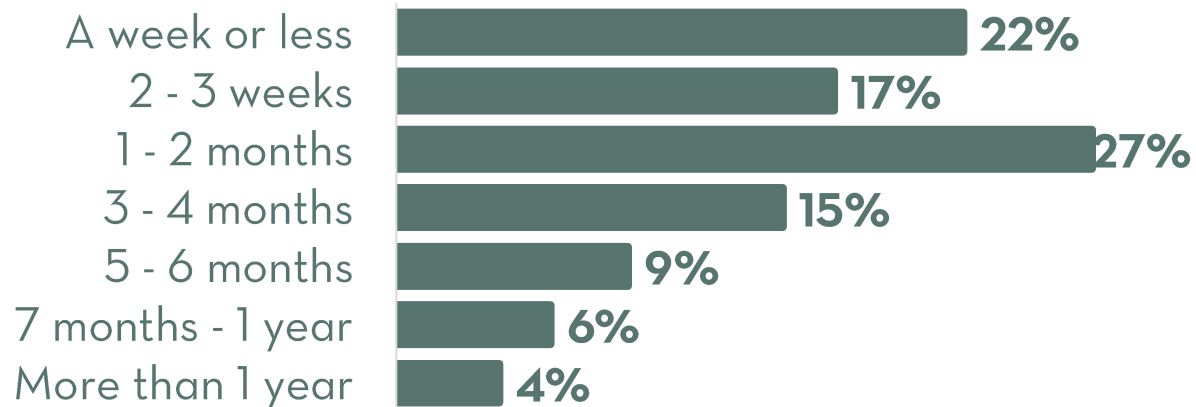
TRIP PLANNING CYCLE

- » Typical visitors to the Maine Highlands began planning their trip **55 days** in advance (+5 days from 2021)
- » **69%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **42 days** in advance (+1 days from 2021)
- » **2 in 3** visitors have a booking window of less than 3 months

Beginning of Trip Cycle

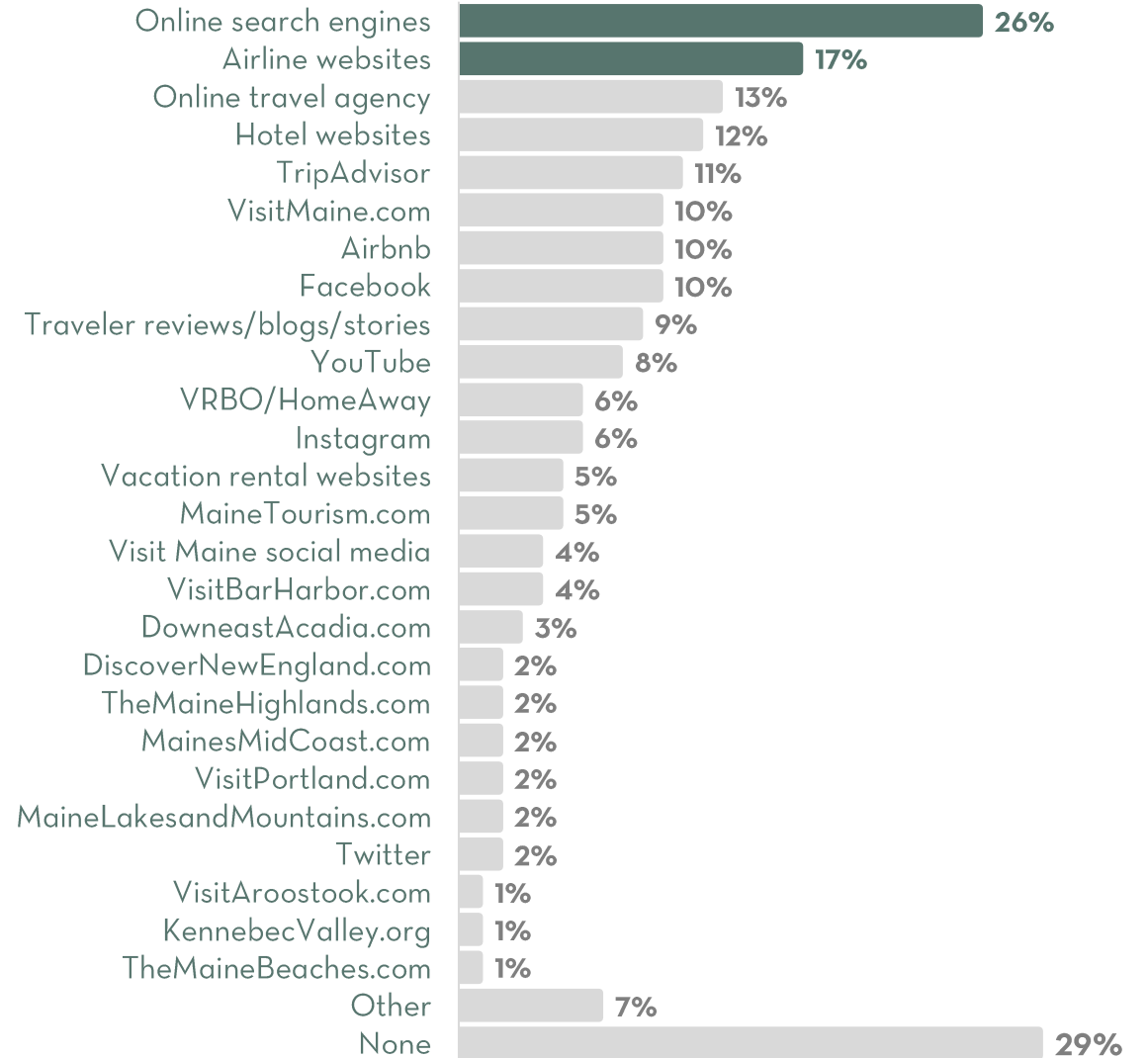


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

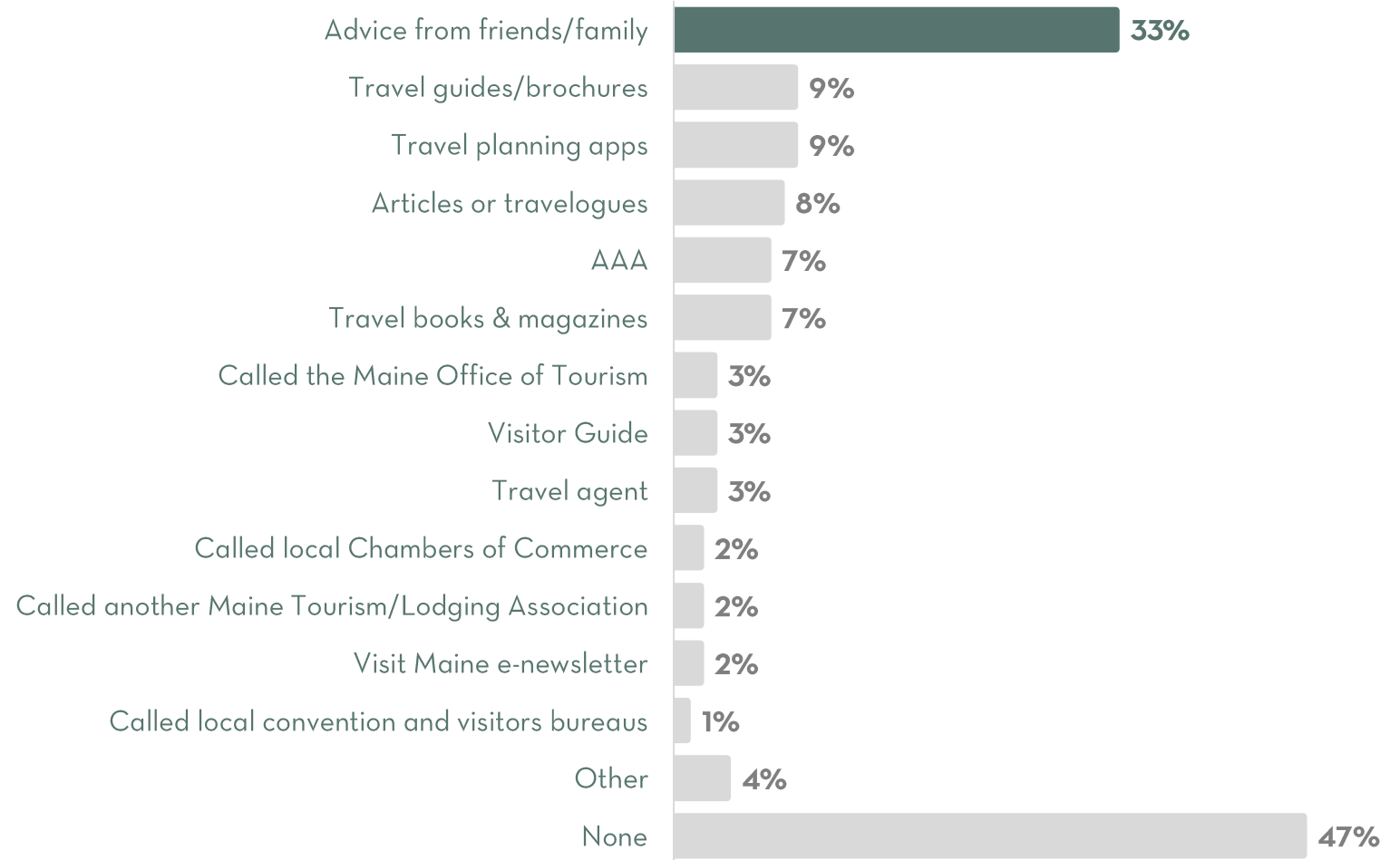
- » **7 in 10** visitors used one or more online resources to help them plan their trip to the Maine Highlands
- » Over **1 in 4** visitors used an online search engine, such as Google, to help them plan their trip to the Maine Highlands
- » About **10%** visitors used VisitMaine.com (+1% points from 2021)



*Multiple responses permitted.

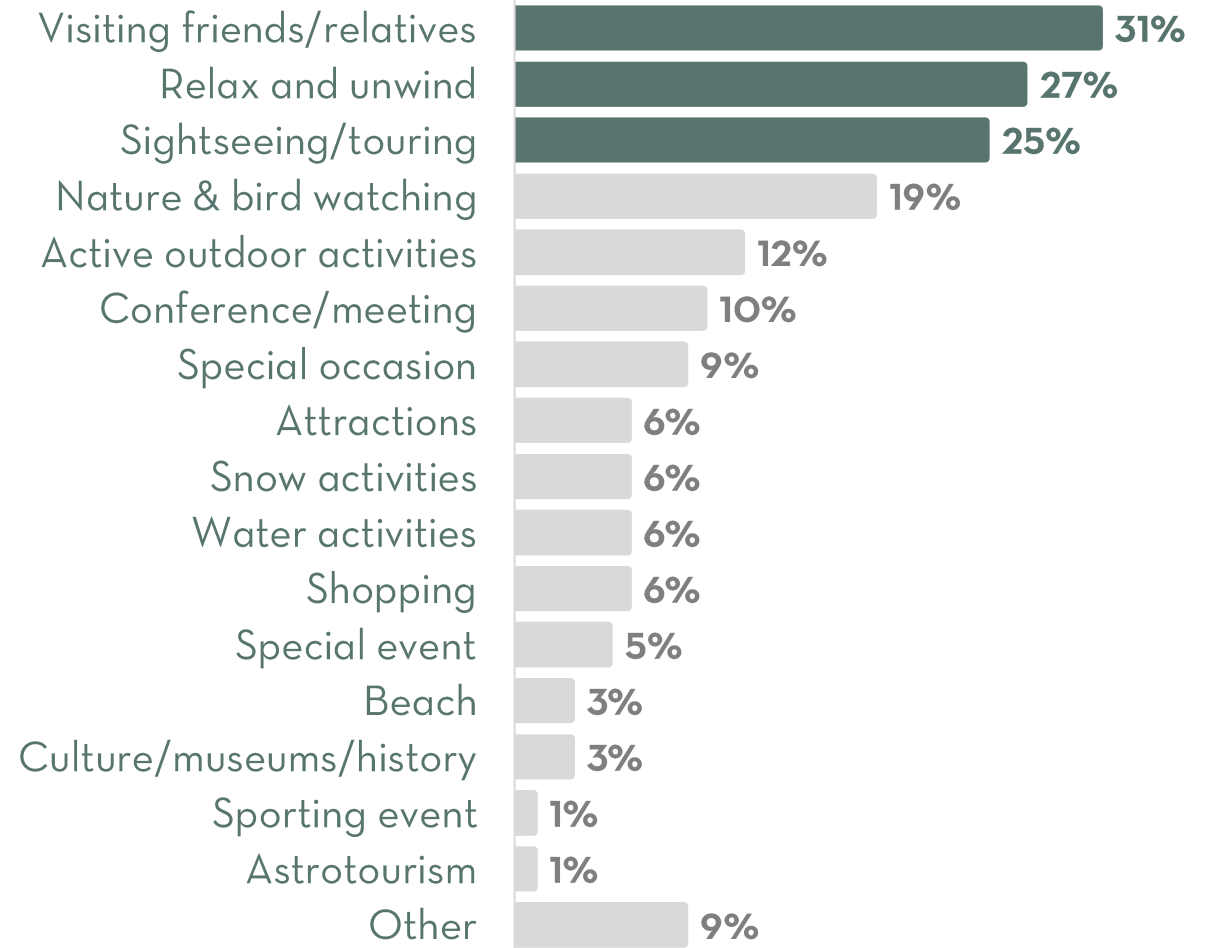
OTHER TRIP PLANNING SOURCES*

- » **1 in 3** visitors relied on advice from their friends and family to help them plan their trip to the Maine Highlands
- » Nearly **half** of visitors did not use any other resources to help them plan their trip to the Maine Highlands



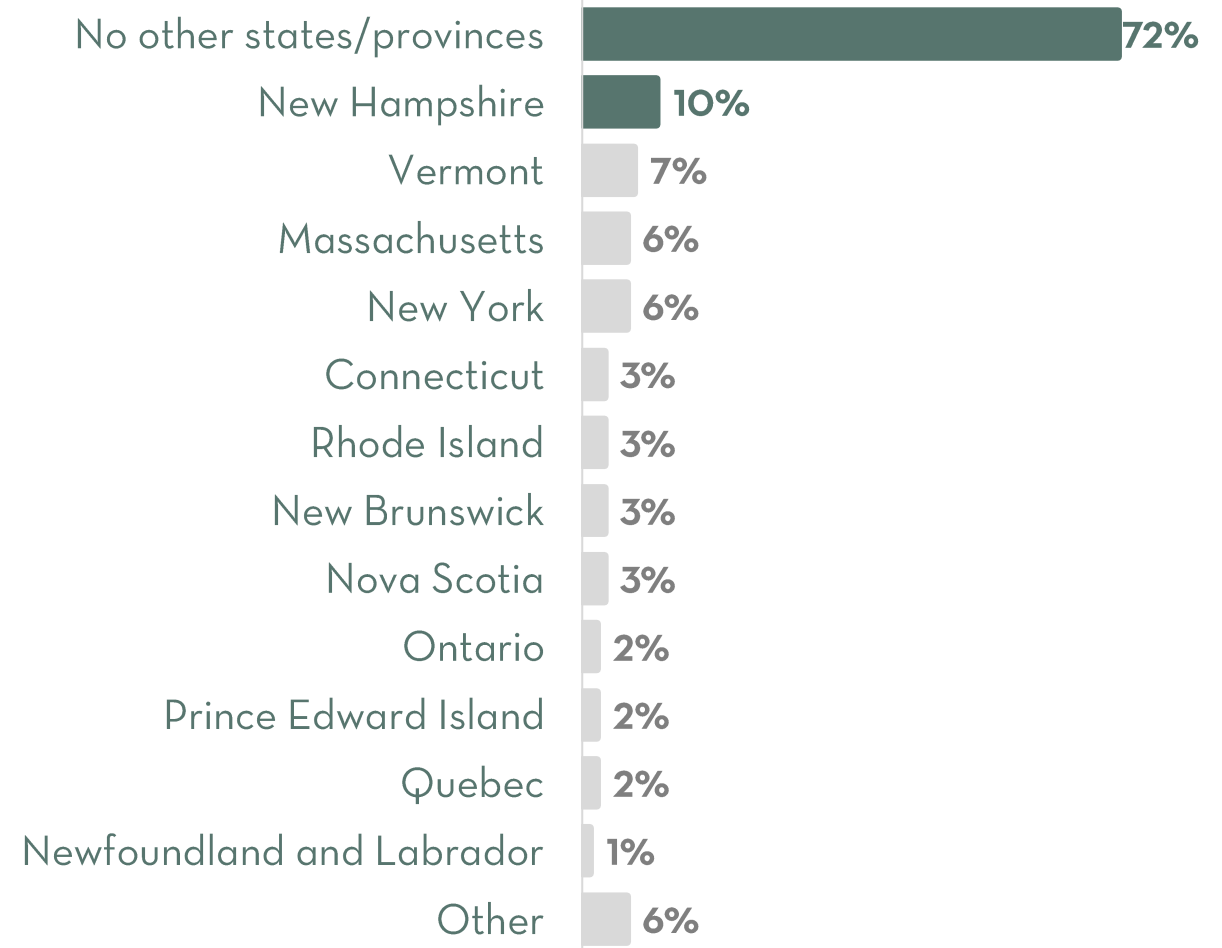
REASONS FOR VISITING*

- » Over **3 in 10** visitors traveled to the Maine Highlands to go visit friends/relatives
- » **27%** visitors came to the Maine Highlands to relax and unwind
- » **1 in 4** visitors traveled to the Maine Highlands for sightseeing/touring



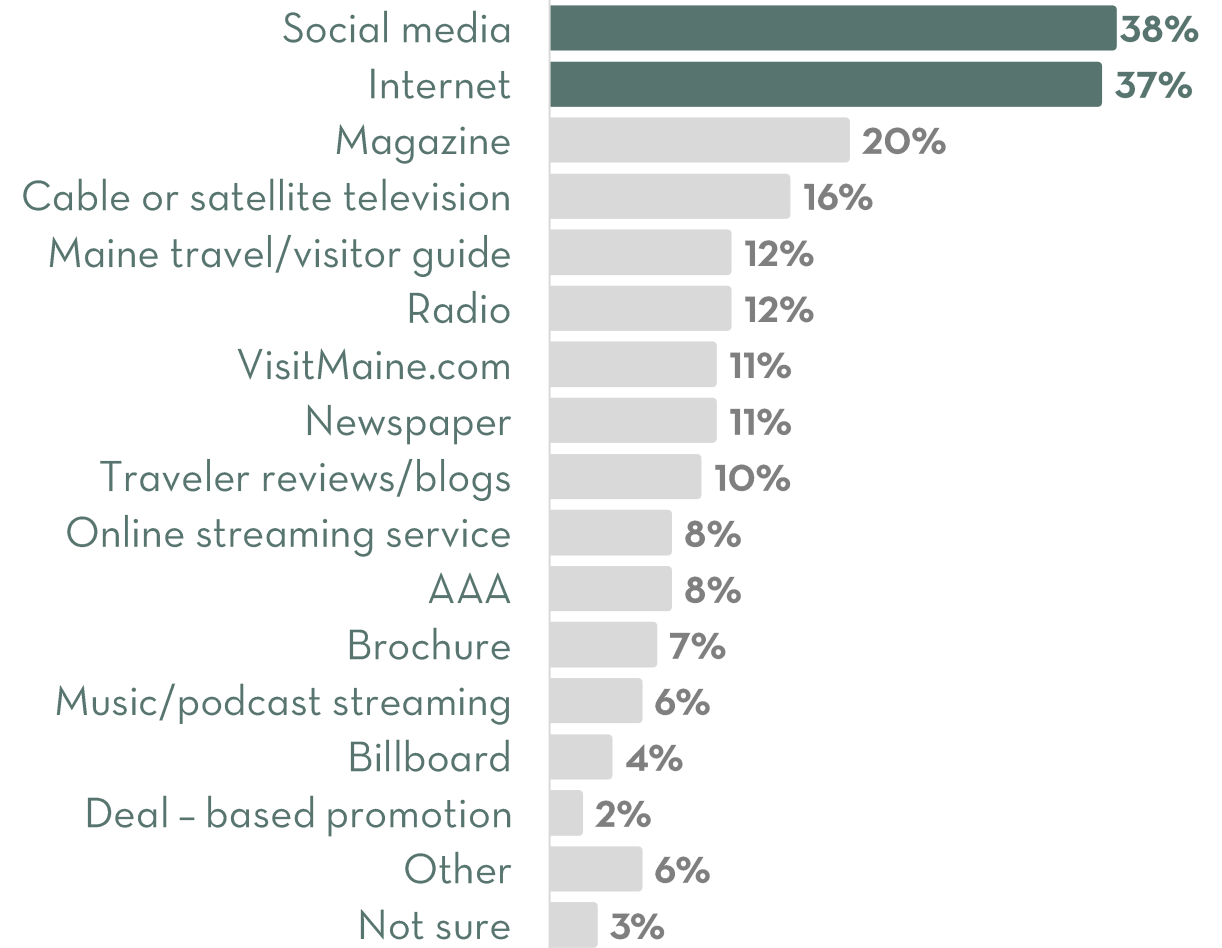
OTHER STATES & PROVINCES CONSIDERED*

- » **72%** of visitors considered visiting **only** Maine while planning their trips to the Maine Highlands
- » Visitors to the Maine Highlands were **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

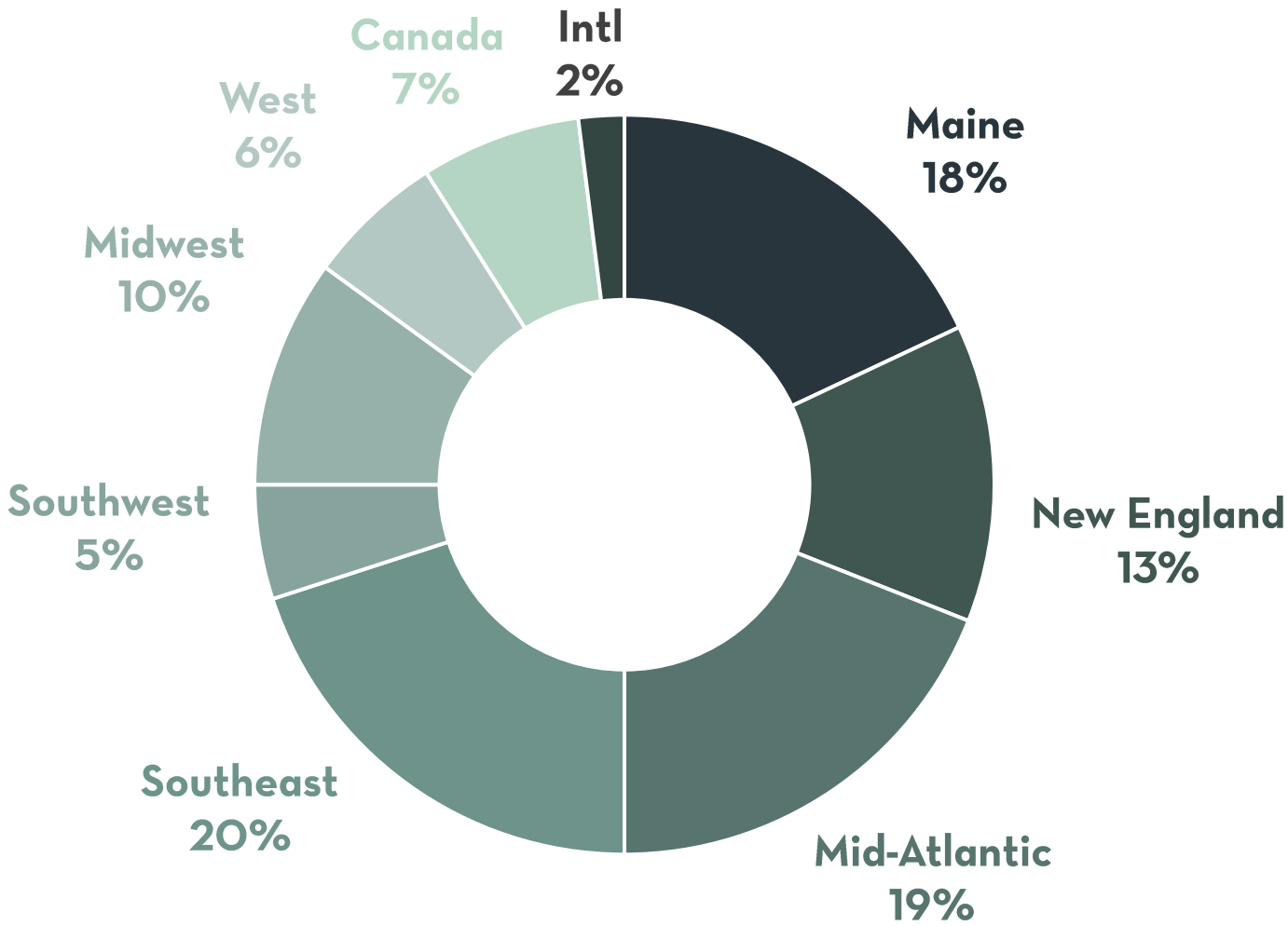
- » **35%** of visitors noticed advertising or promotions for Maine prior to their trip to the Maine Highlands
- » Visitors who recalled this advertising primarily saw it on **social media** or the **internet**
- » This information influenced **17%** of all the Maine Highlands visitors to visit Maine



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **66%** of visitors to the Maine Highlands were from 12 U.S. states and New Brunswick
- » **18%** of visitors were residents of Maine traveling throughout the state

State	Percent
Maine	18%
Florida	9%
Massachusetts	6%
New York	6%
New Brunswick	5%
New Hampshire	4%
Georgia	3%
New Jersey	3%
North Carolina	3%
Pennsylvania	3%
Texas	3%
Virginia	3%

TOP ORIGIN MARKETS

- » Nearly **1 in 3** visitors to the Maine Highlands traveled from **11** U.S. markets
- » **7%** of visitors traveled to the Maine Highlands from New York City

Market	Percent
New York City ¹	7%
Washington DC - Baltimore ²	5%
Boston	3%
Atlanta	2%
Dallas - Ft. Worth	2%
Chicago	2%
Orlando	2%
Miami - Ft. Lauderdale	2%
Philadelphia	2%
Bangor	2%
Portland, ME	2%

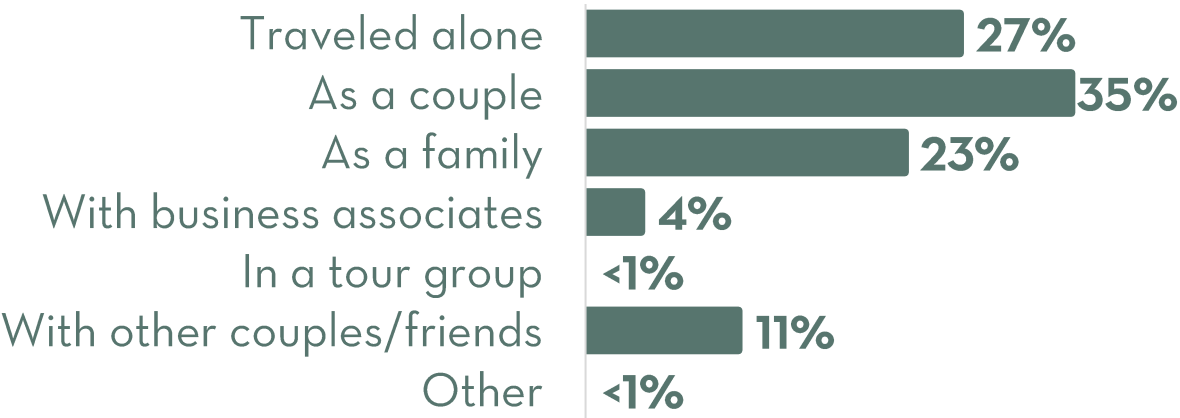
¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

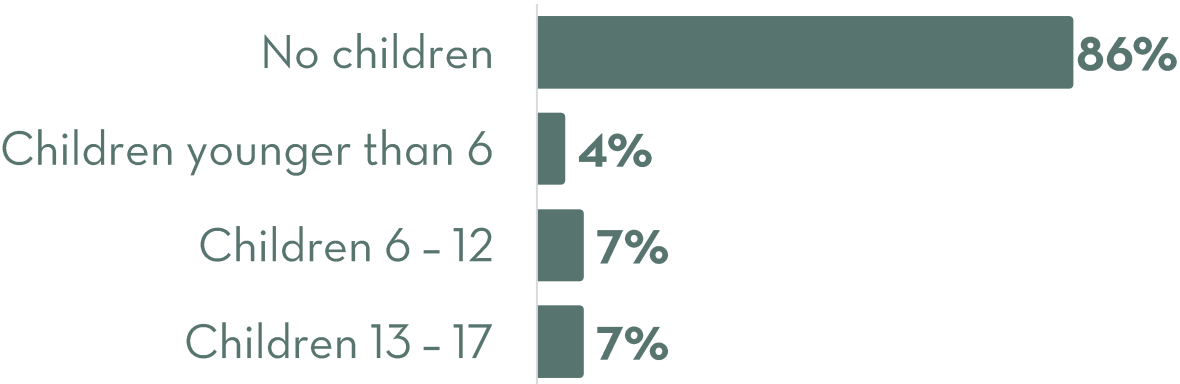
TRAVEL PARTIES

- » Typical visitors traveled to the Maine Highlands in parties of **2.5** people
- » Over **1 in 3** visitors traveled as a couple
- » **24%** of visitors traveled with one or more children in their travel party

Travel Party Composition

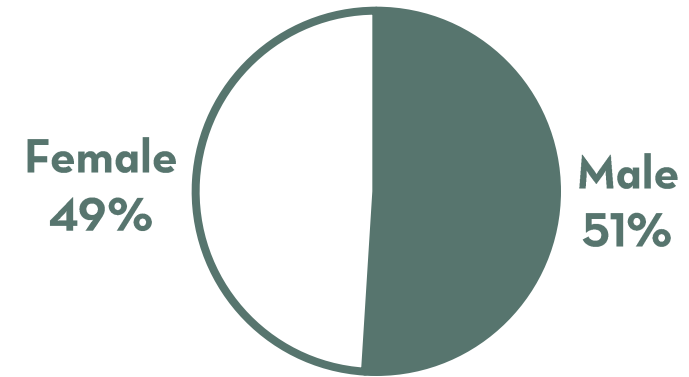


Children in Travel Party*



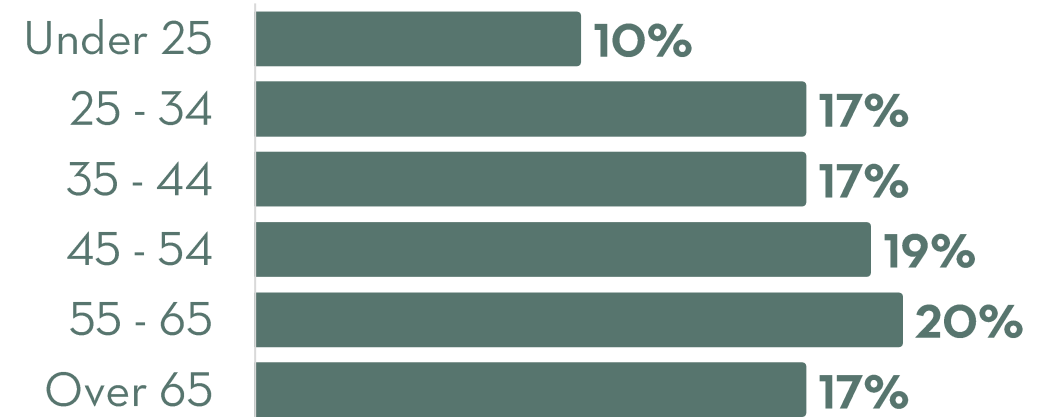
*Multiple responses permitted.

- » **51%** visitors to the Maine Highlands interviewed were males



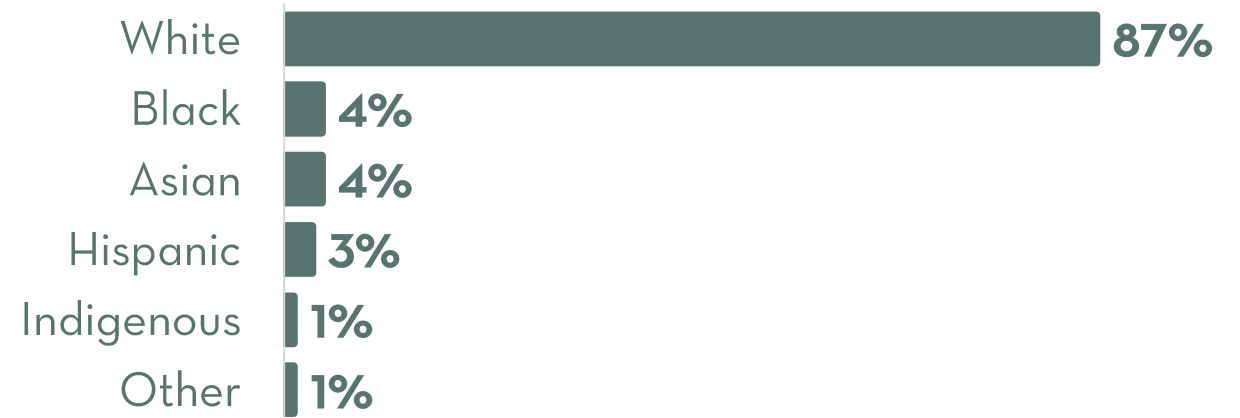
*Of visitors interviewed.

» The average age of visitors to the Maine Highlands is **48** years old



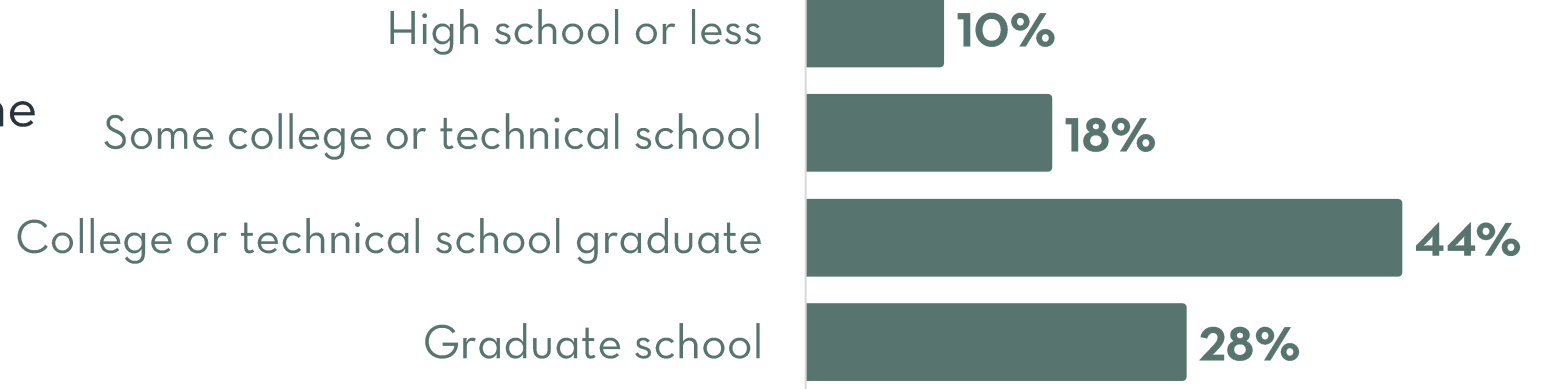
RACE & ETHNICITY

» Nearly **9 in 10** visitors to the Maine Highlands were white



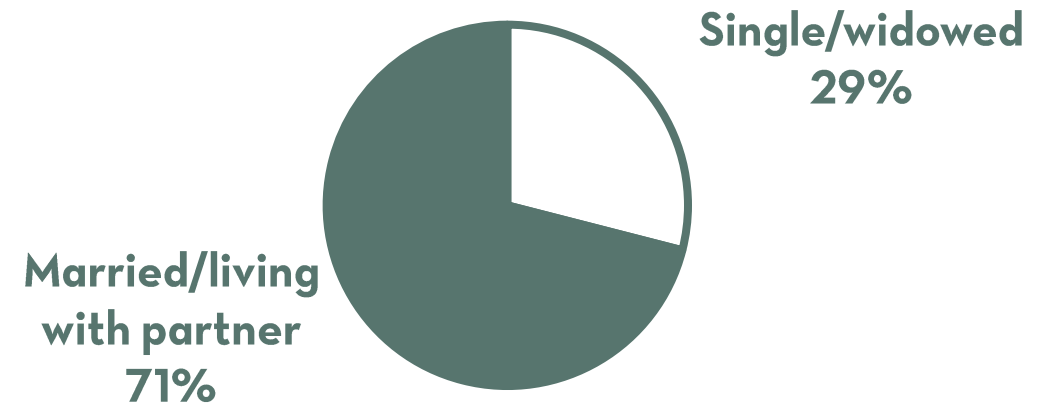
EDUCATIONAL ATTAINMENT

» **7 in 10** visitors to the Maine Highlands have a college/technical school degree or higher



MARITAL STATUS

- » Over **7 in 10** visitors to the Maine Highlands were married or living with their partner



EMPLOYMENT STATUS

» **7 in 10** visitors to the Maine Highlands were employed, most full-time



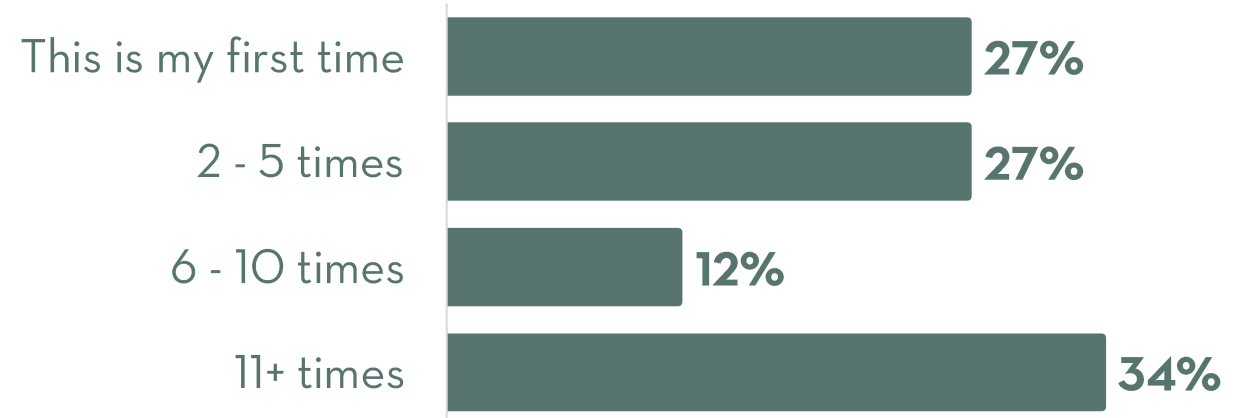
HOUSEHOLD INCOME

- » The average household income of visitors to the Maine Highlands is **\$100,000** per year
- » **29%** of visitors to the Maine Highlands earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » **27%** of visitors to the Maine Highlands were traveling in Maine for the first time
- » **34%** of visitors to the Maine Highlands had previously traveled in Maine more than 10 times

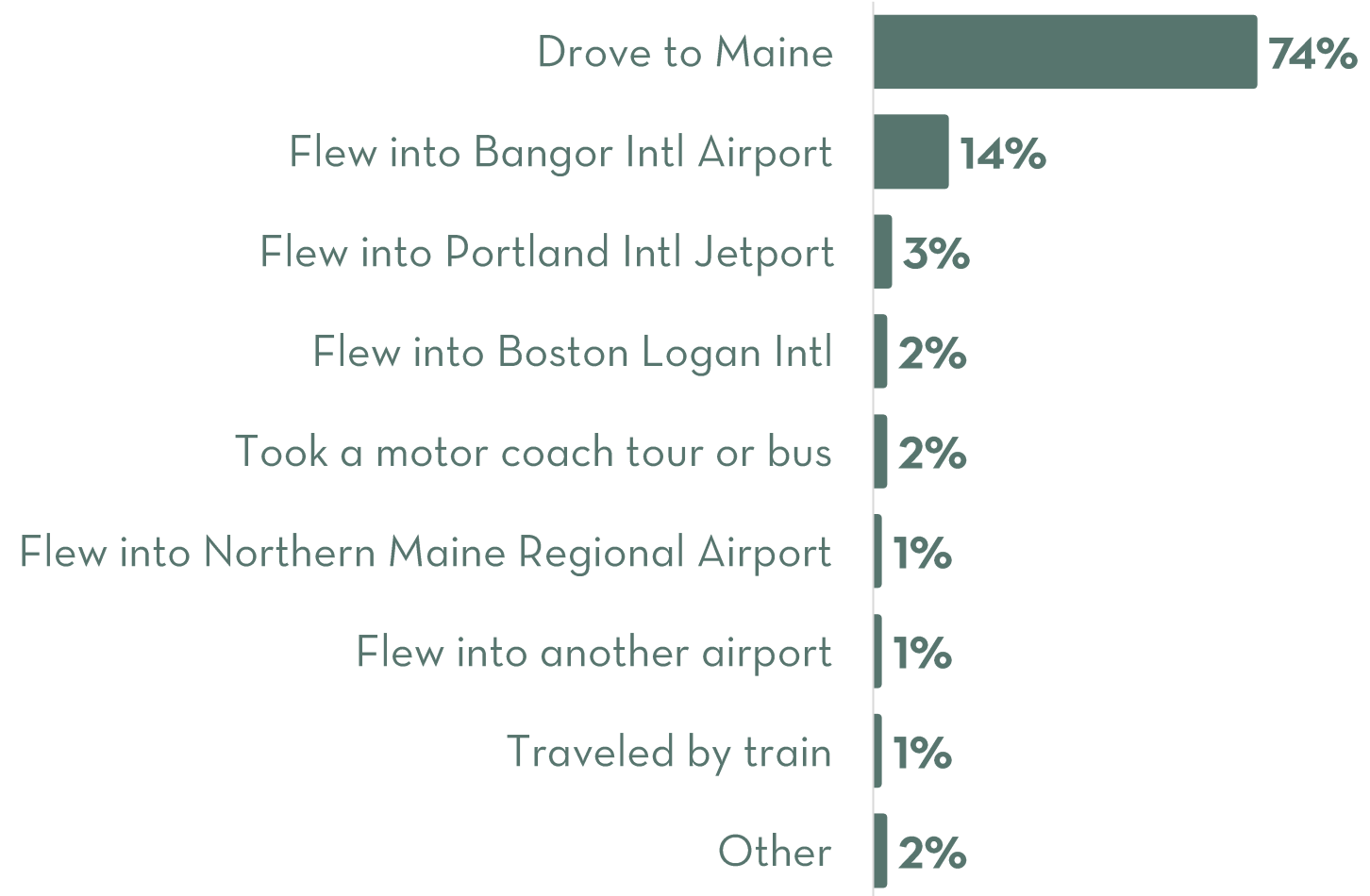


TRIP PLANNING CYCLE : TRIP EXPERIENCE



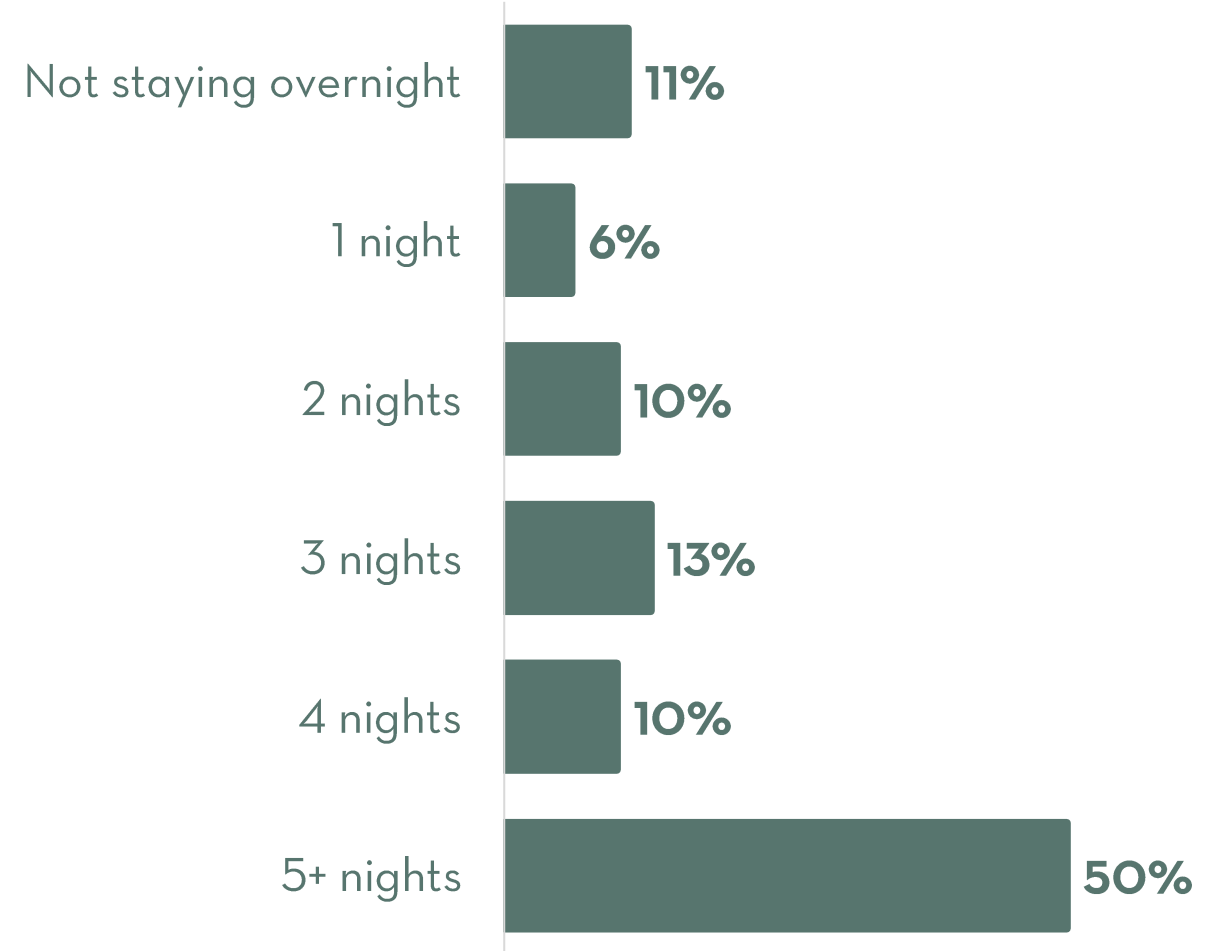
MODES OF TRANSPORTATION

- » The Maine Highlands is a drive-market for most visitors, with **74%** choosing to travel by car over plane, motor coach/bus, or train
- » Most the Maine Highlands visitors who flew to Maine arrived at Bangor International Airport



NIGHTS STAYED

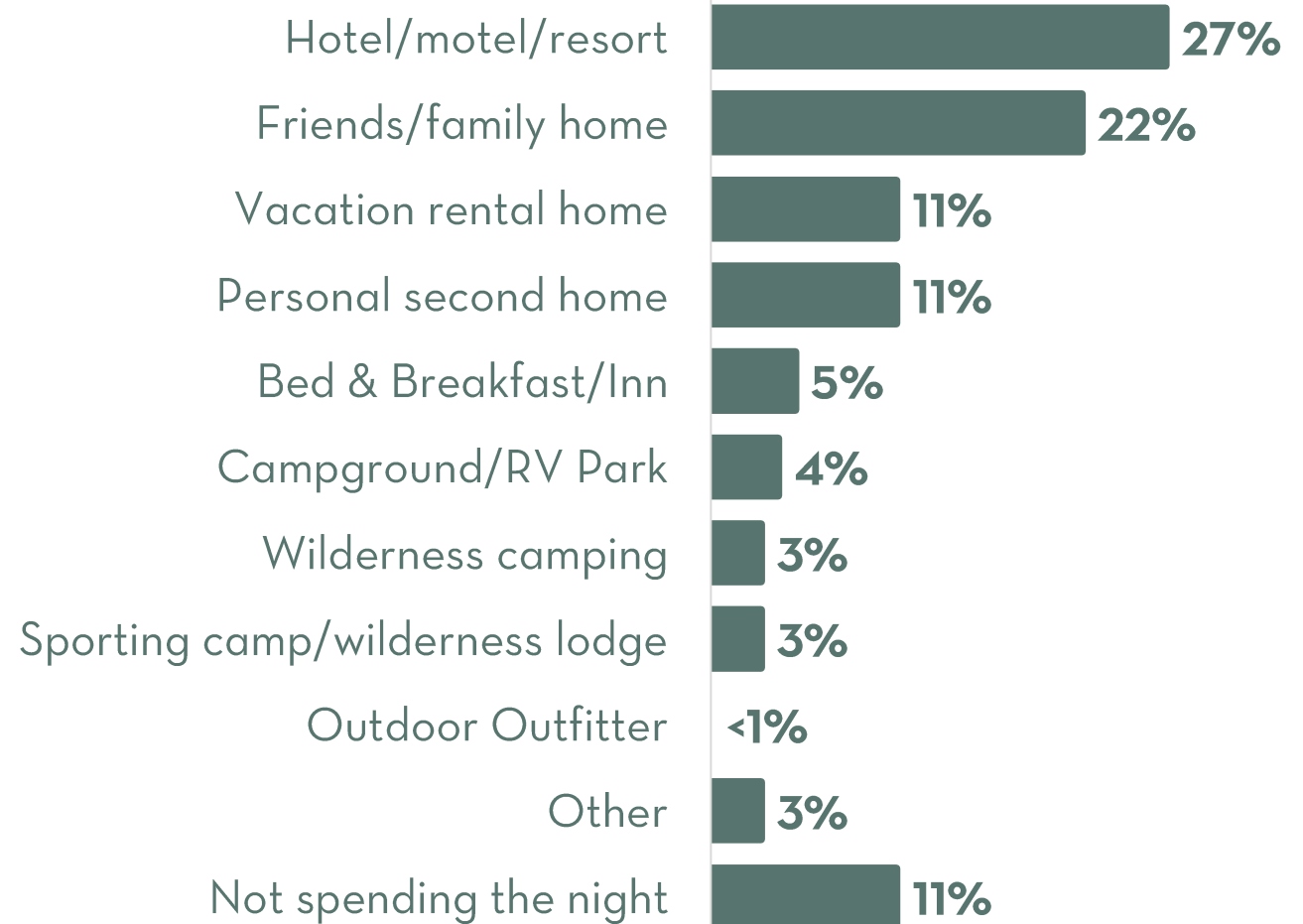
- » **89%** of visitors to the Maine Highlands stayed one or more nights in Maine on their trip
- » Typical visitors stayed **6.8*** nights in the Maine Highlands on their trips
- » Typical visitors to the Maine Highlands staying overnight in paid accommodations stayed **5.6** nights in Maine on their trips



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

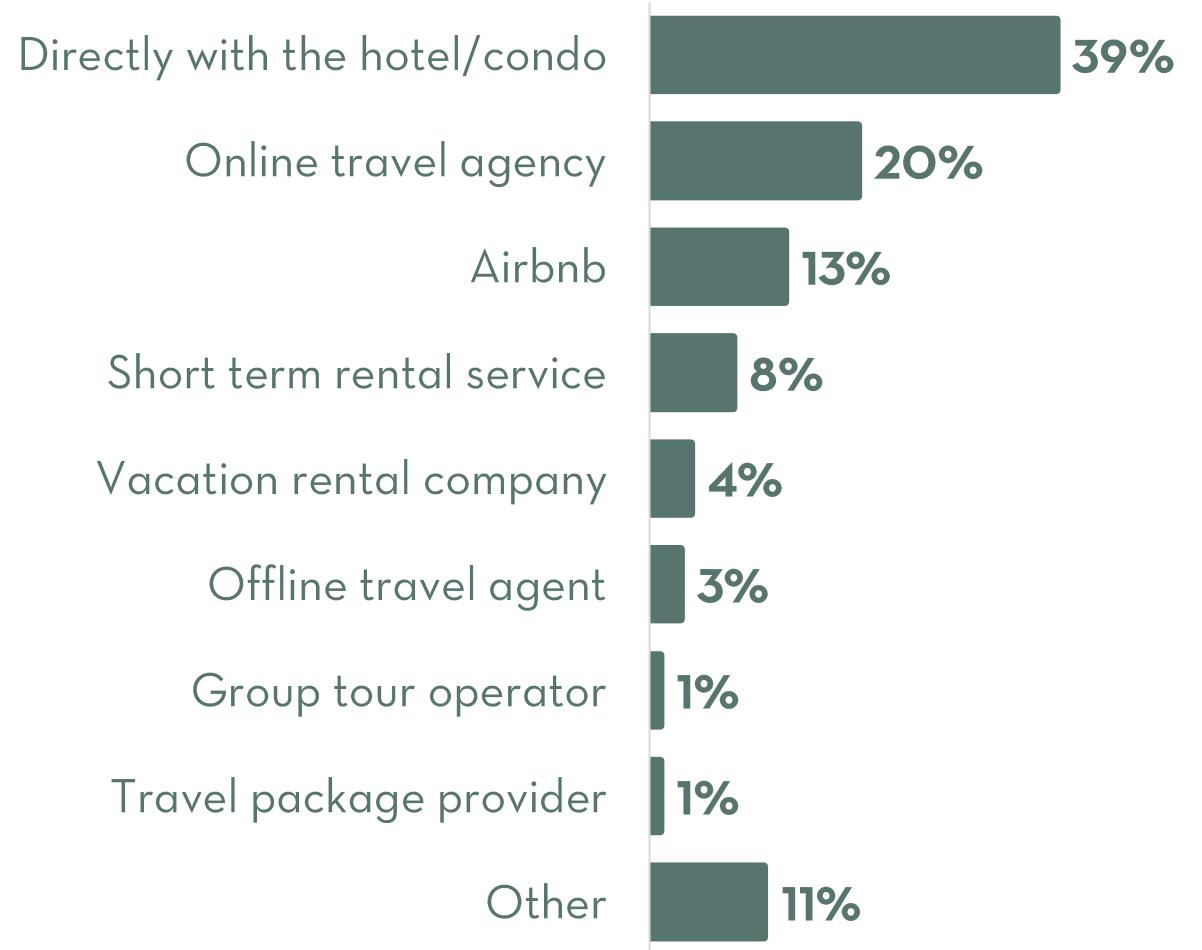
ACCOMMODATIONS

- » Over **1 in 4** visitors to the Maine Highlands stayed overnight at a hotel/motel/resort
- » Over **1 in 5** visitors stayed with friends and relatives on their trip to the Maine Highlands



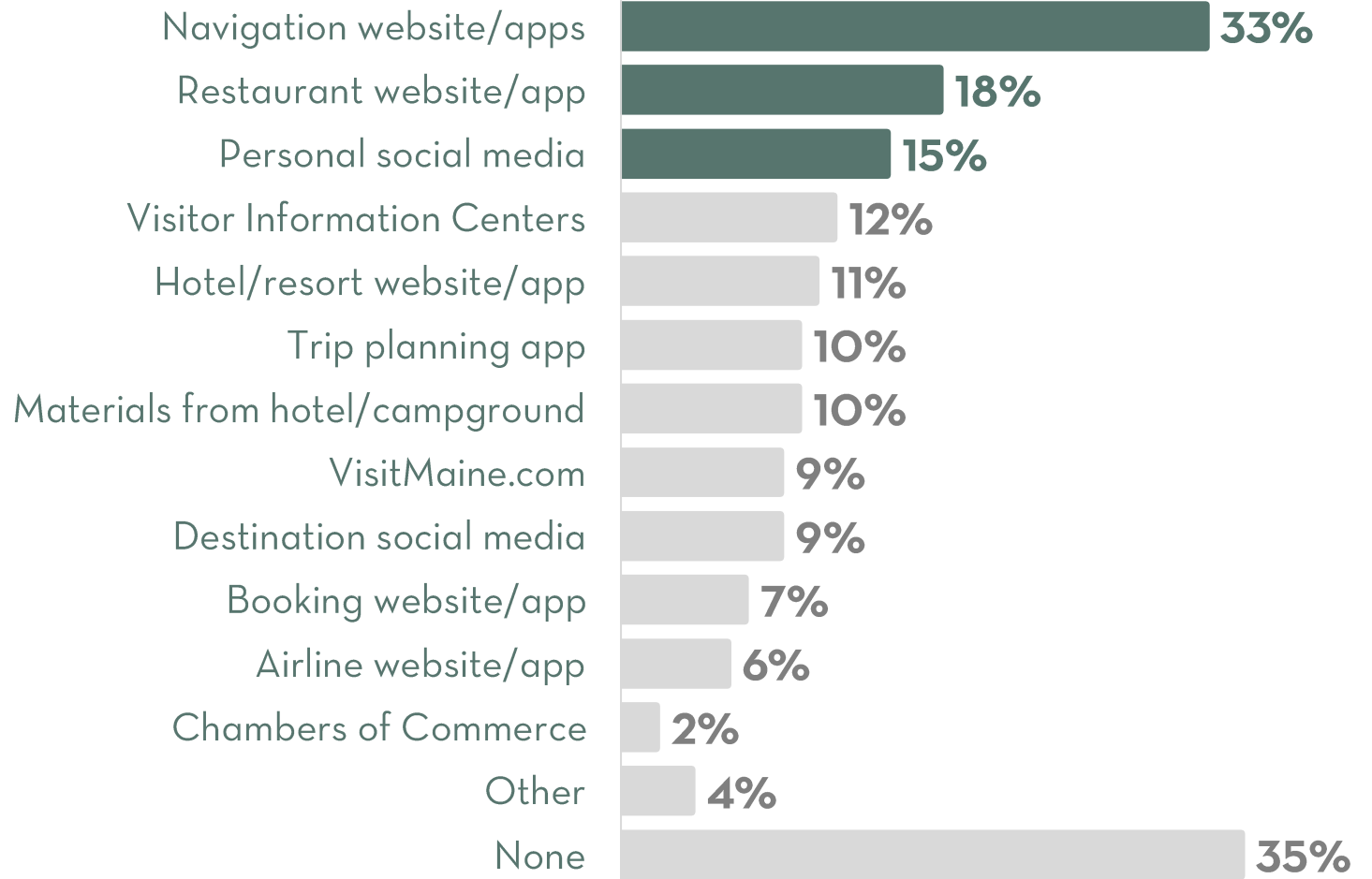
BOOKING METHODS

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



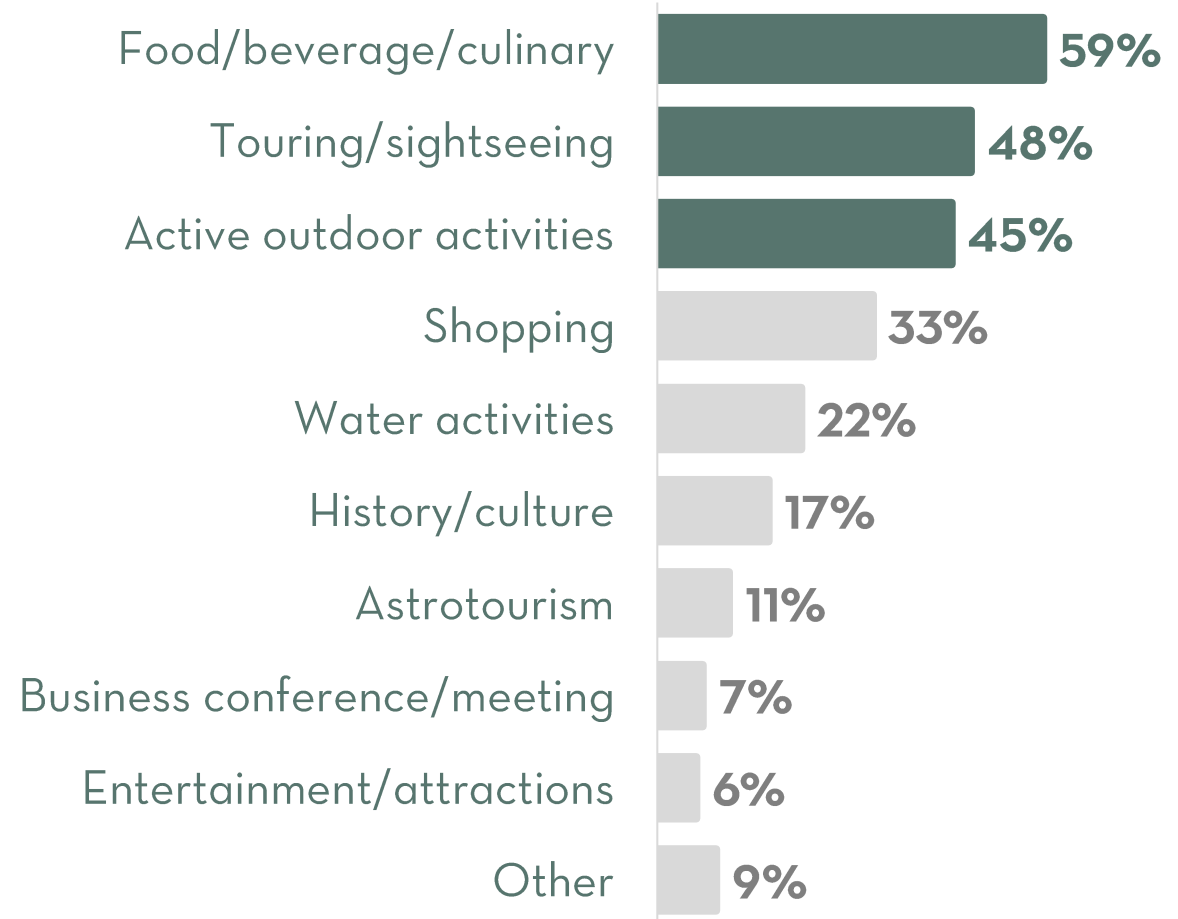
IN-MARKET VISITOR RESOURCES*

- » Visitors were more likely to rely on **navigation websites/apps** to plan activities in-market
- » About **18%** of visitors used a restaurant website or app
- » **35%** of visitors did not use any resources to plan activities while they were in the Maine Highlands

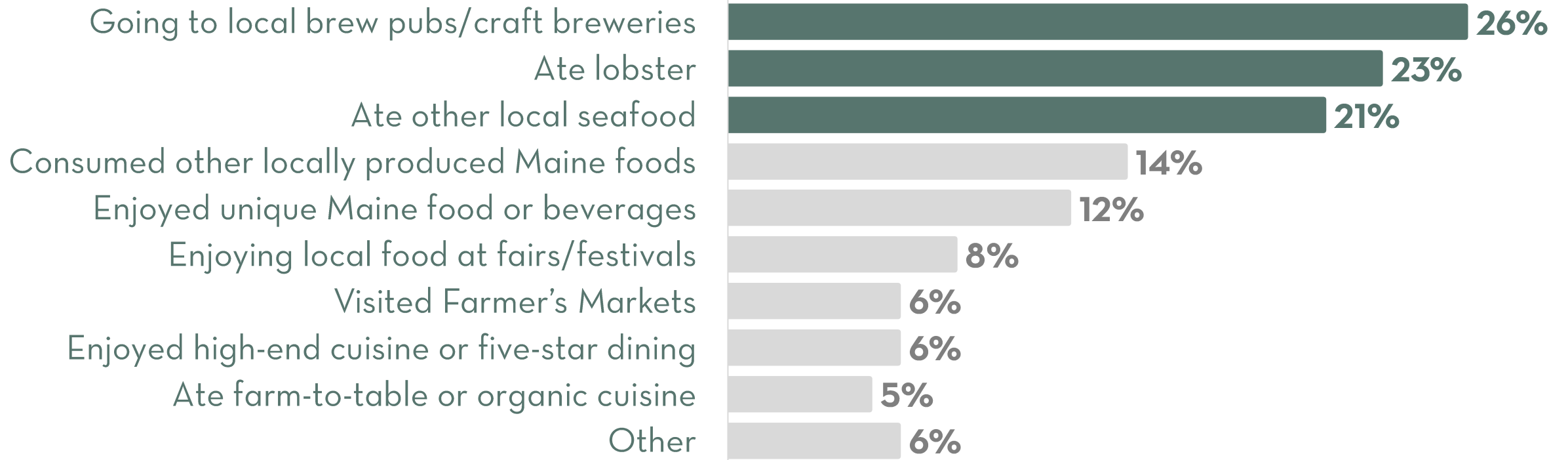


VISITOR ACTIVITIES*

- » **59%** of visitors engaged in food/beverage/culinary activities during their trip to the Maine Highlands
- » Nearly **half** of visitors went touring/sightseeing during their trip to the Maine Highlands
- » Over **2 in 5** visitors engaged in active outdoor activities during their trip to the Maine Highlands

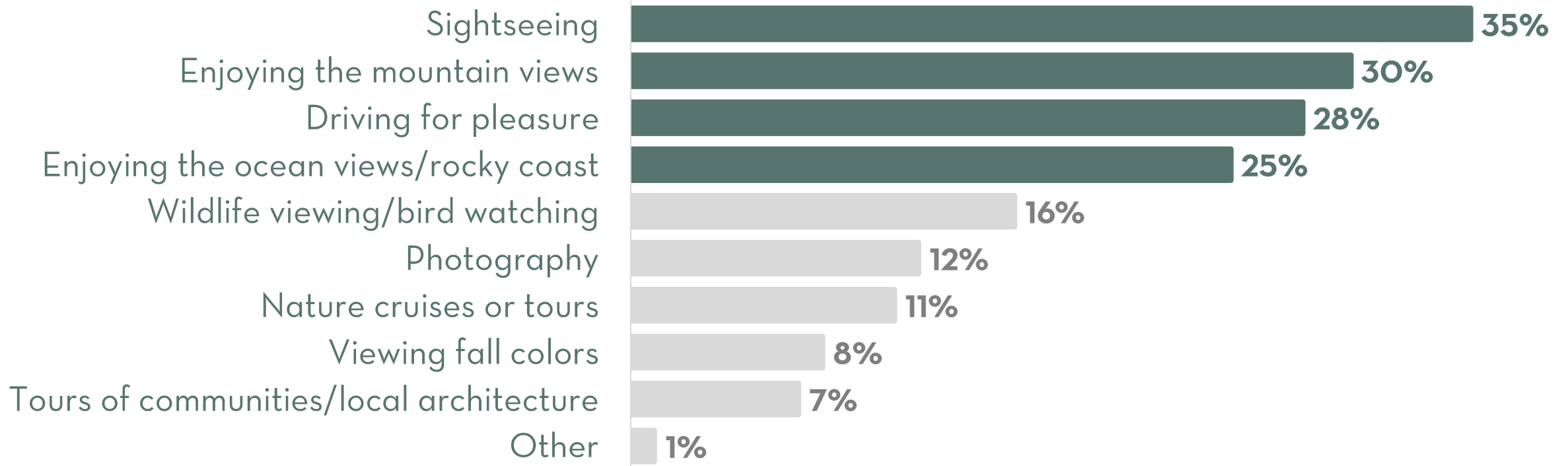


FOOD & BEVERAGE ACTIVITIES*

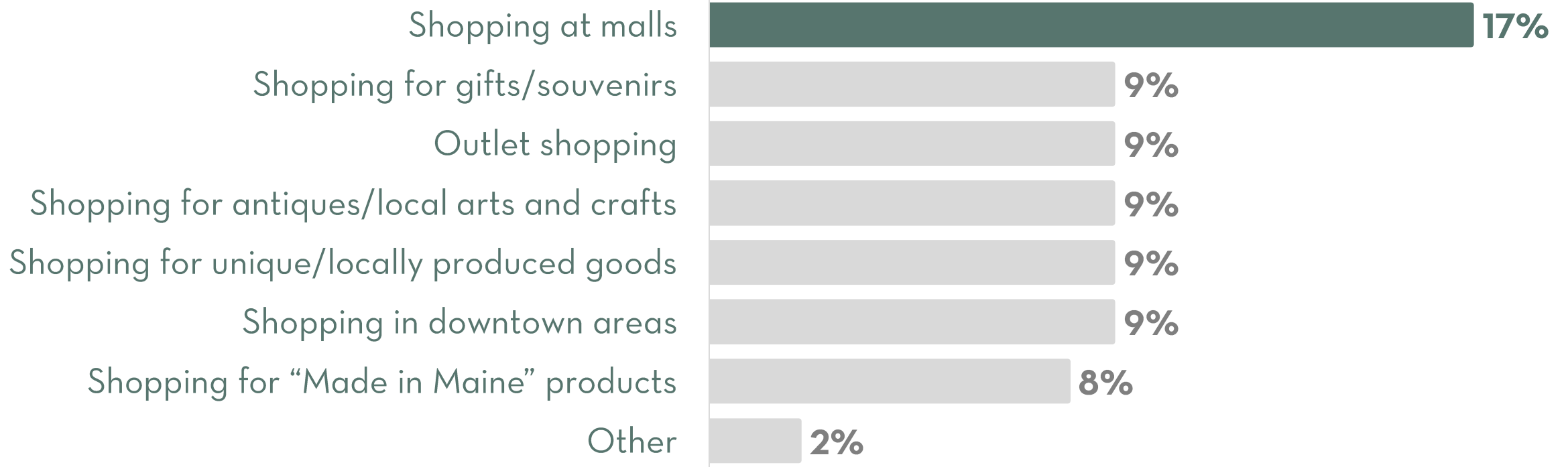


*Multiple responses permitted.

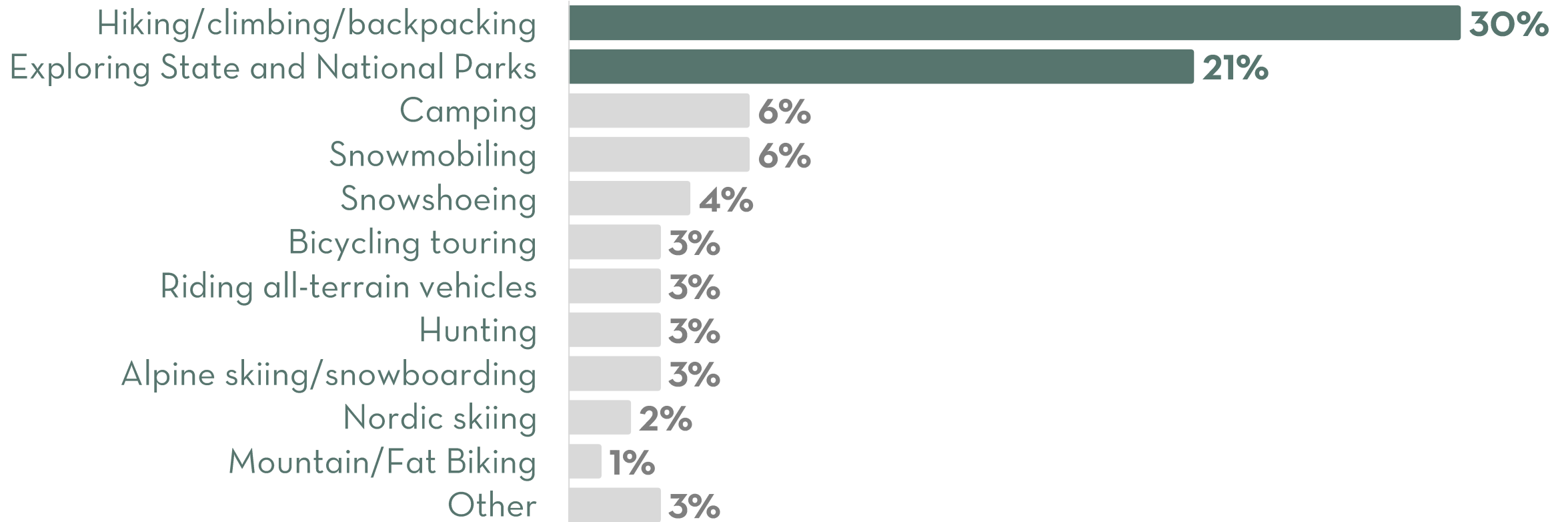
TOURING & SIGHTSEEING ACTIVITIES*



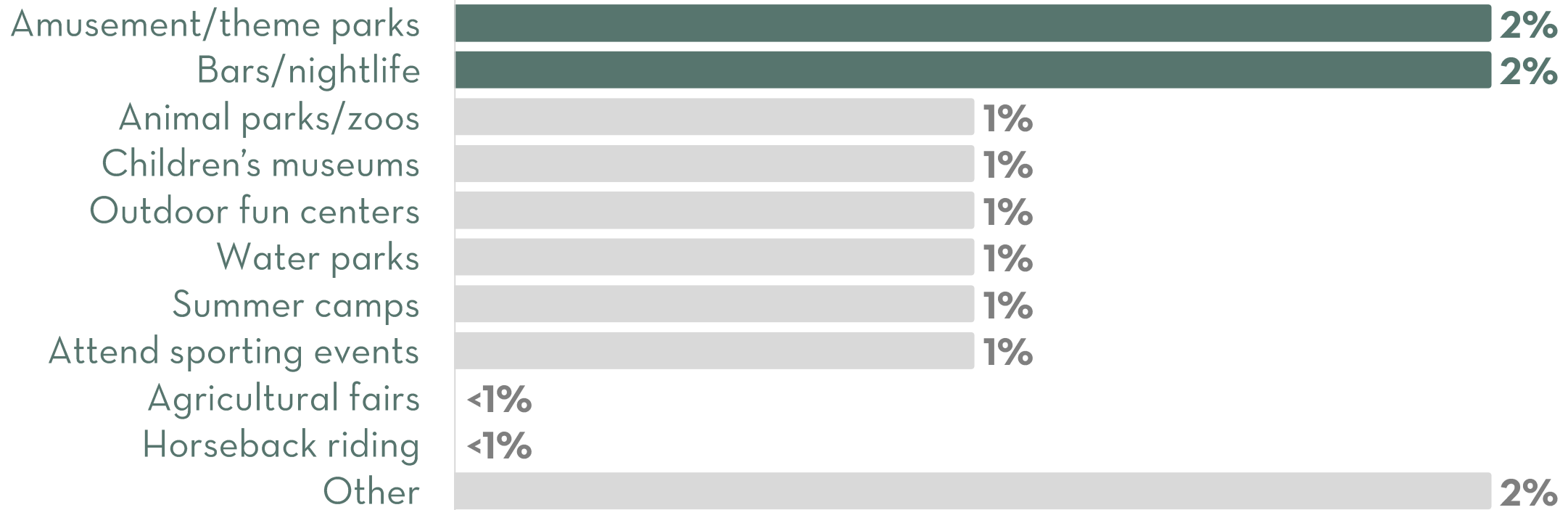
SHOPPING ACTIVITIES*



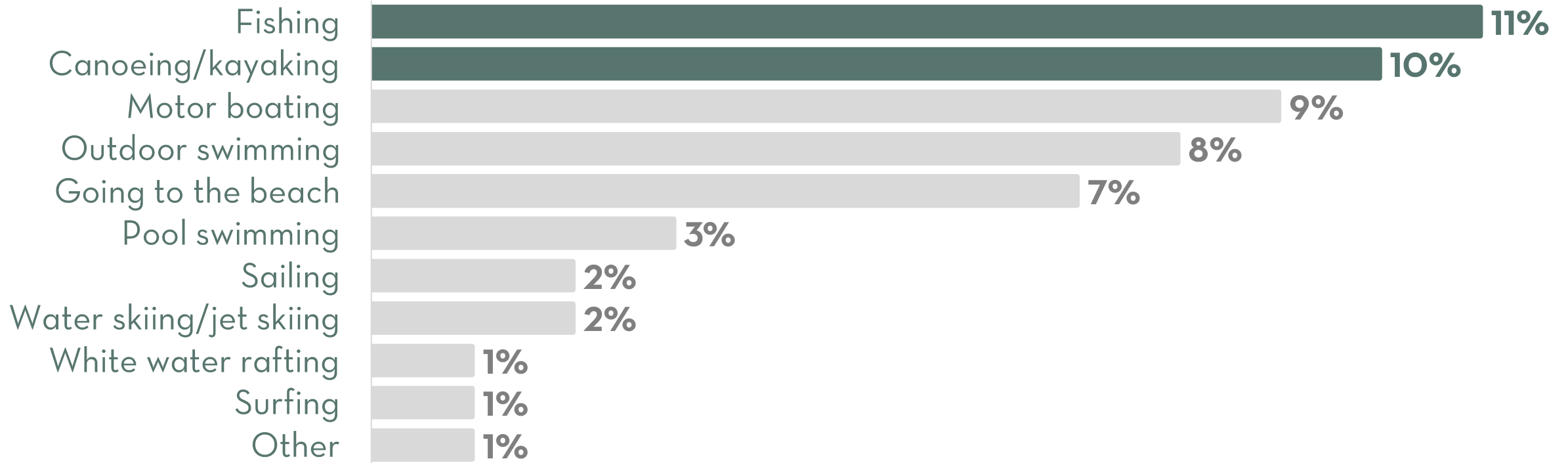
ACTIVE OUTDOOR ACTIVITIES*



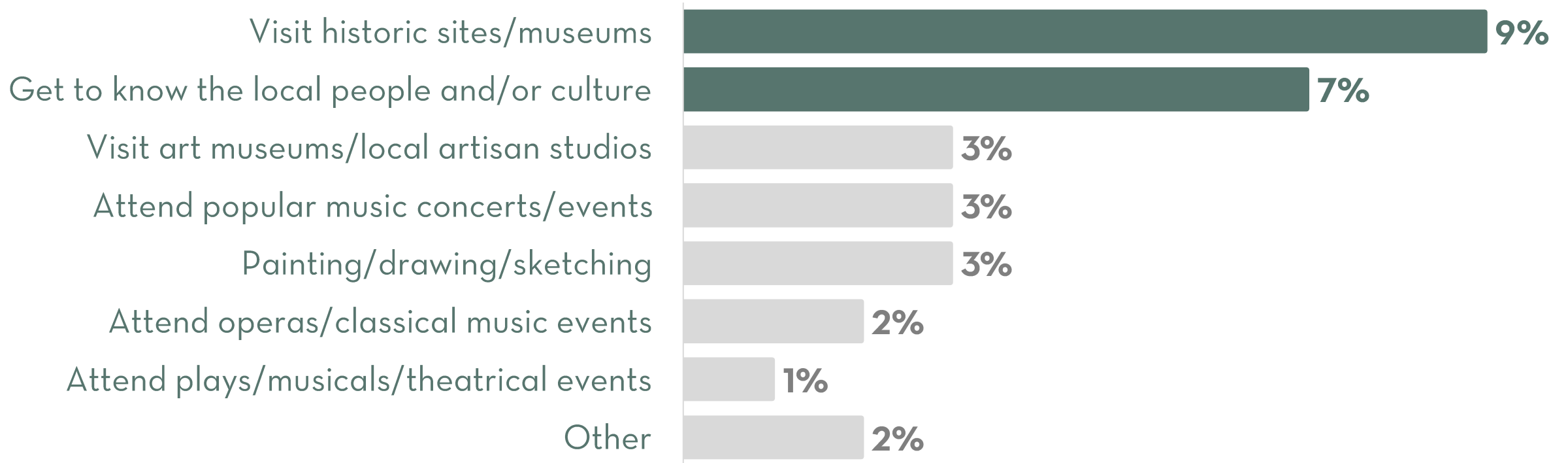
ENTERTAINMENT ACTIVITIES*



WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

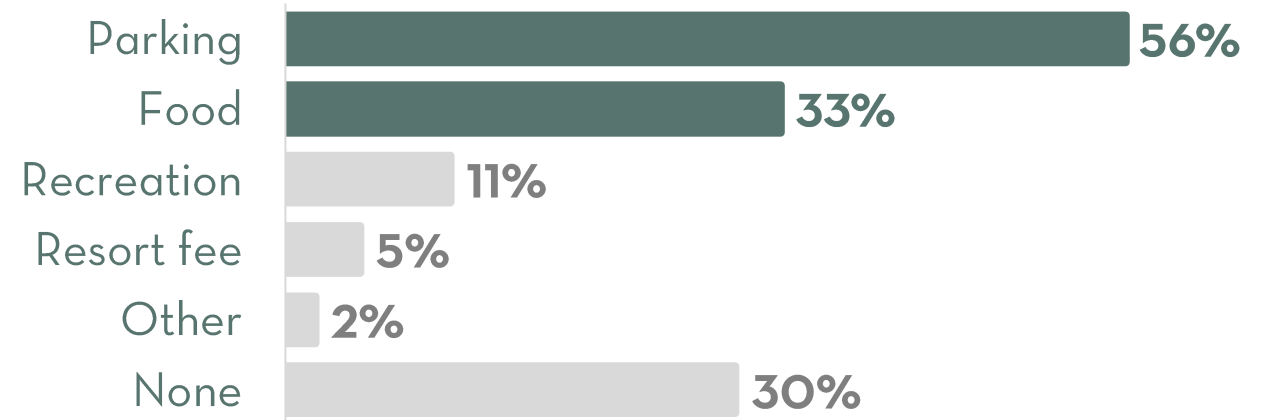
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$216	\$0	\$0
Restaurants	\$67	\$42	\$42
Groceries	\$28	\$35	\$15
Shopping	\$100	\$58	\$40
Activities & attractions	\$65	\$38	\$48
Transportation	\$64	\$31	\$16
Other	\$15	\$9	\$3
Daily Spending	\$555	\$213	\$164

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,357	\$0	\$0
Restaurants	\$425	\$373	\$42
Groceries	\$158	\$284	\$15
Shopping	\$671	\$528	\$41
Activities & attractions	\$367	\$314	\$47
Transportation	\$364	\$256	\$16
Other	\$90	\$82	\$3
Trip Spending	\$3,432	\$1,837	\$164

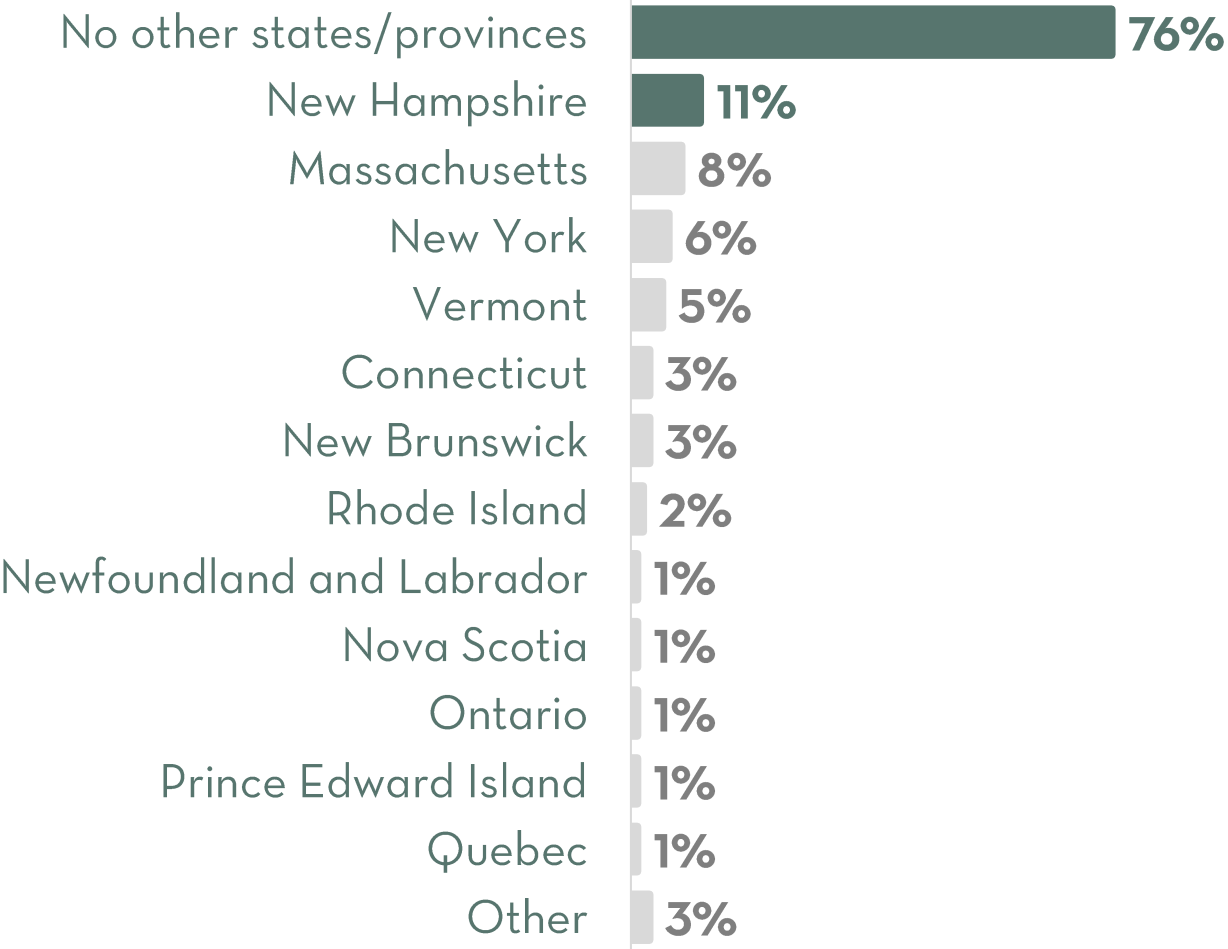
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc. was included in the room price for **7 in 10** visitors
- » Price for accommodations included parking for nearly **3 in 5** visitors
- » Food was included in accommodations' pricing for **1 in 3** visitors



OTHER STATES & PROVINCES VISITED*

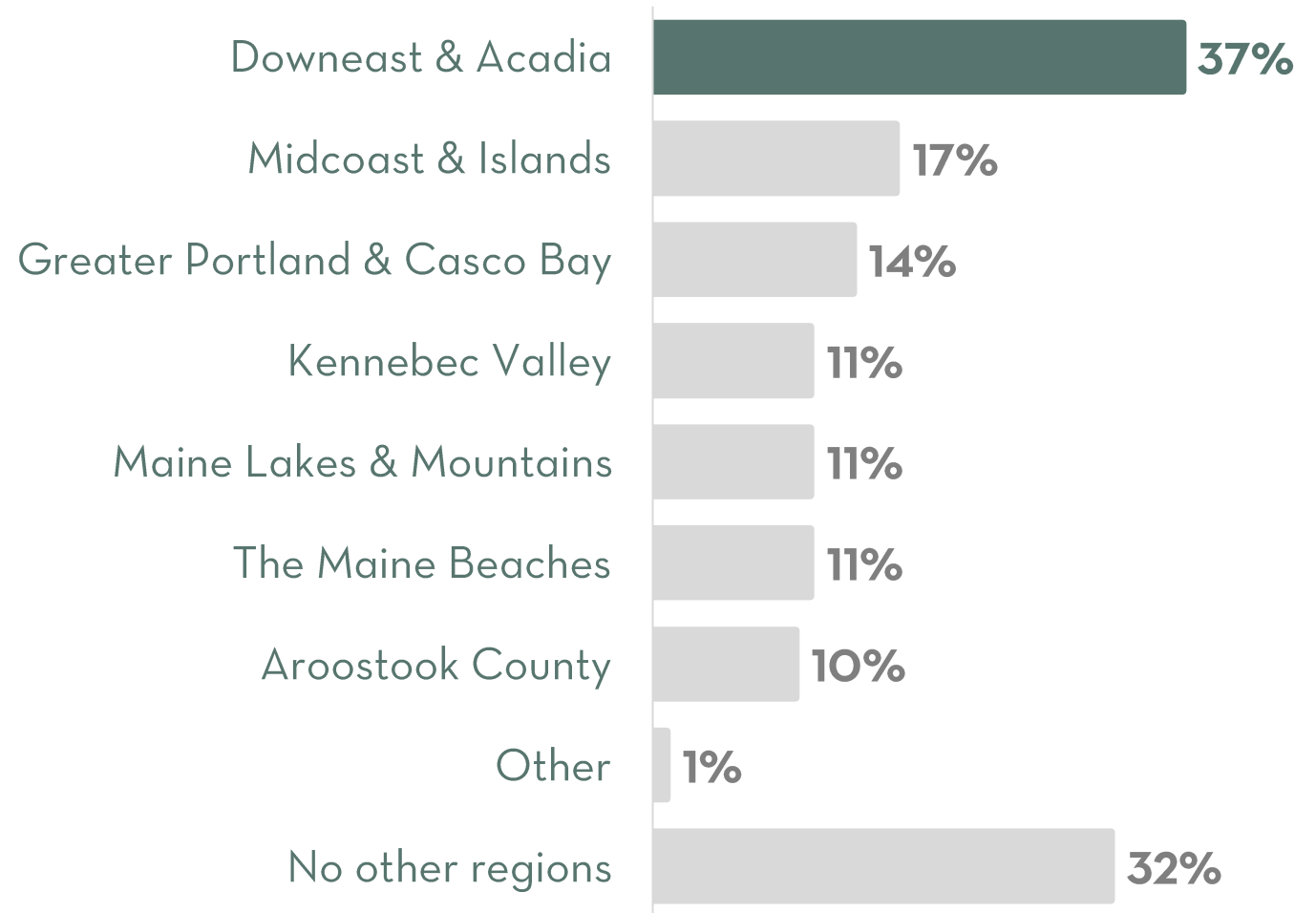
- » Nearly **4 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » Visitors continued to be **more likely** to visit U.S. states near the Maine Highlands than they were to visit a Canadian province during their trip



*Multiple responses permitted.

TRAVELING WITHIN MAINE*

- » Nearly **1 in 3** visitors stayed within the Maine Highlands during their trip in Maine, rather than traveling throughout the state
- » **37%** of visitors to the Maine Highlands traveled to Downeast & Acadia during their trip in Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION

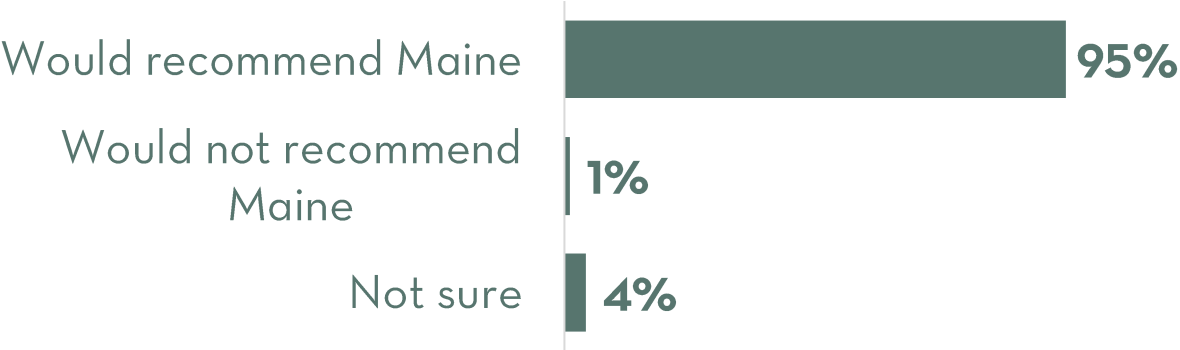


RECOMMENDING MAINE & ITS REGIONS

» **95%** of visitors to the Maine Highlands would recommend that their friends and family choose Maine as their destination for a future visit or vacation

» **87%** of visitors would recommend that their friends and family visit the Maine Highlands – **71%** would definitely recommend

Likelihood of Recommending Maine

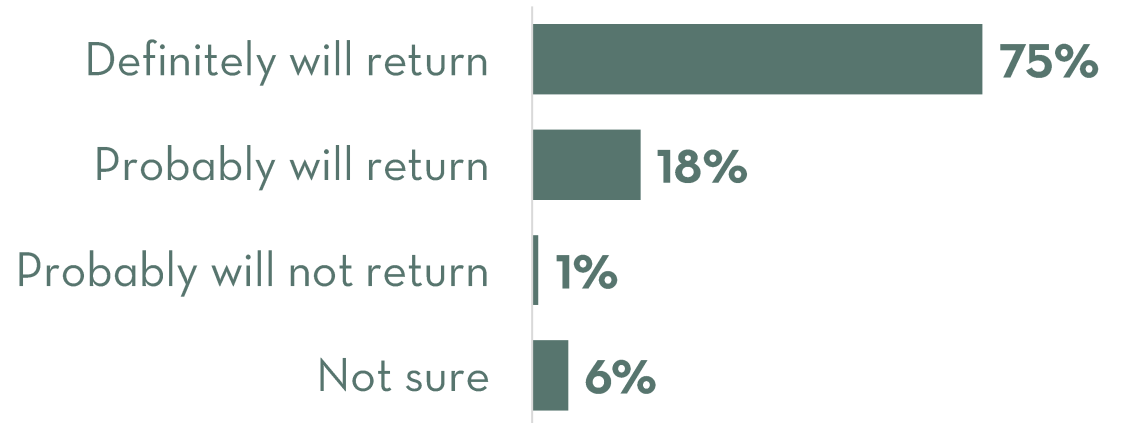


Likelihood of Recommending Region Visited



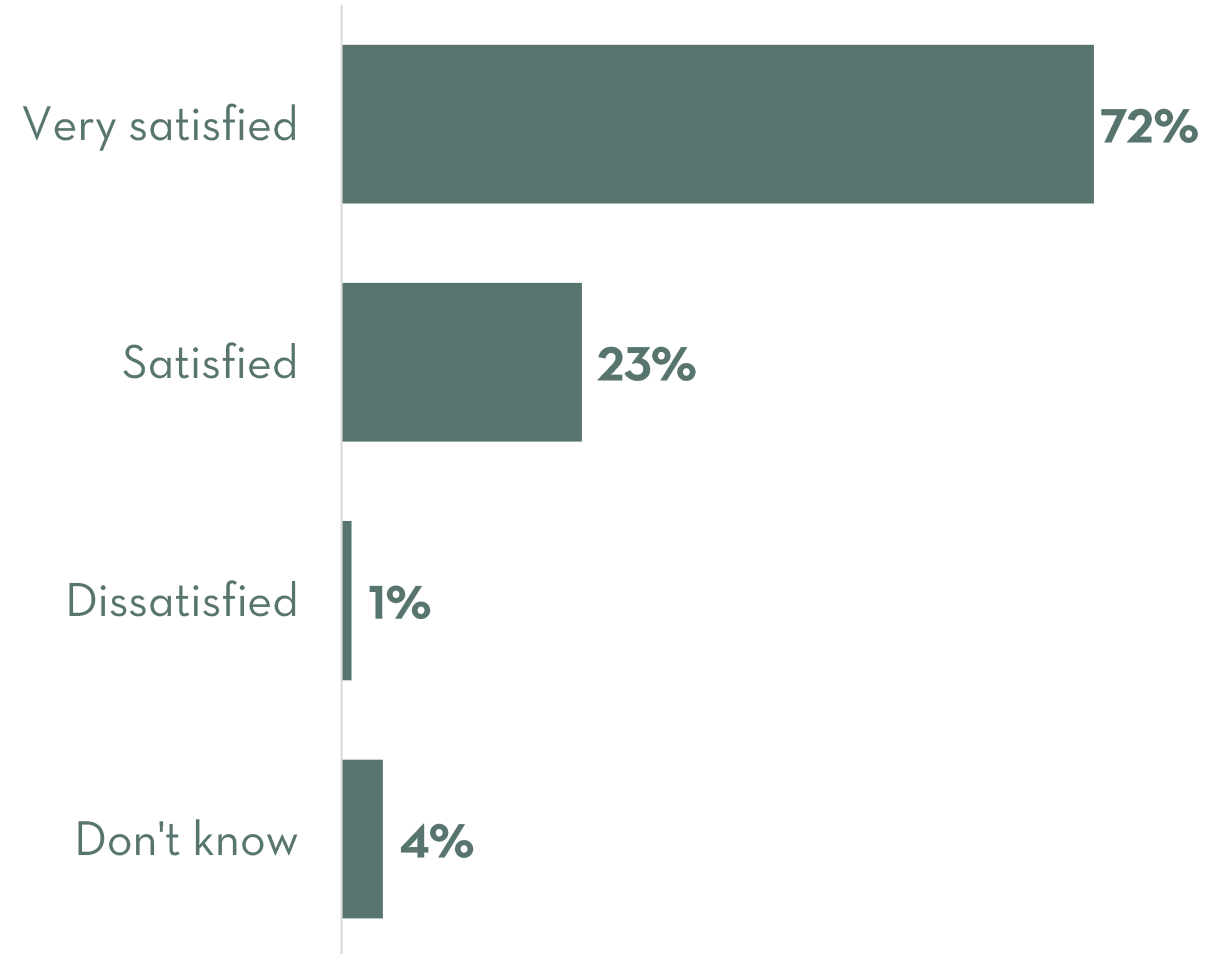
LIKELIHOOD OF RETURNING TO MAINE

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

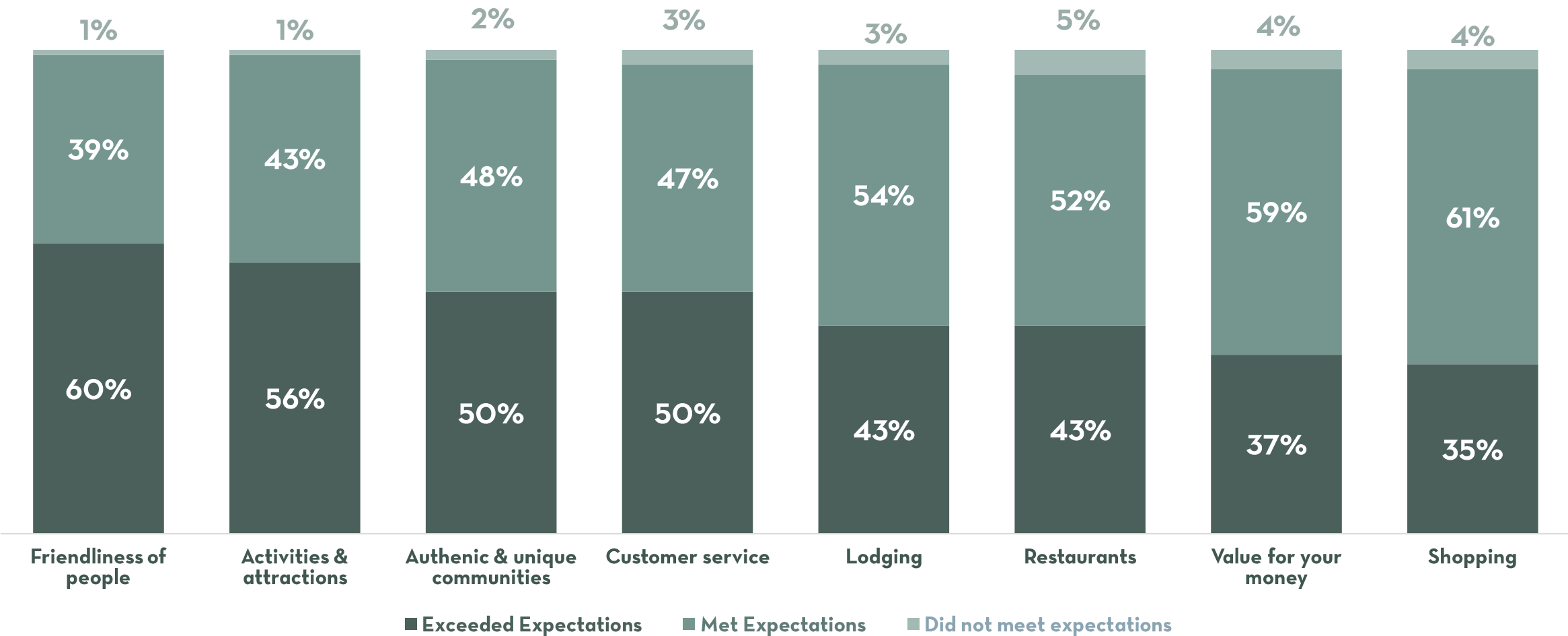


SATISFACTION

- » **95%** of visitors to the Maine Highlands were satisfied with their trip to Maine
- » Over **7 in 10** of visitors were very satisfied with their trip to Maine

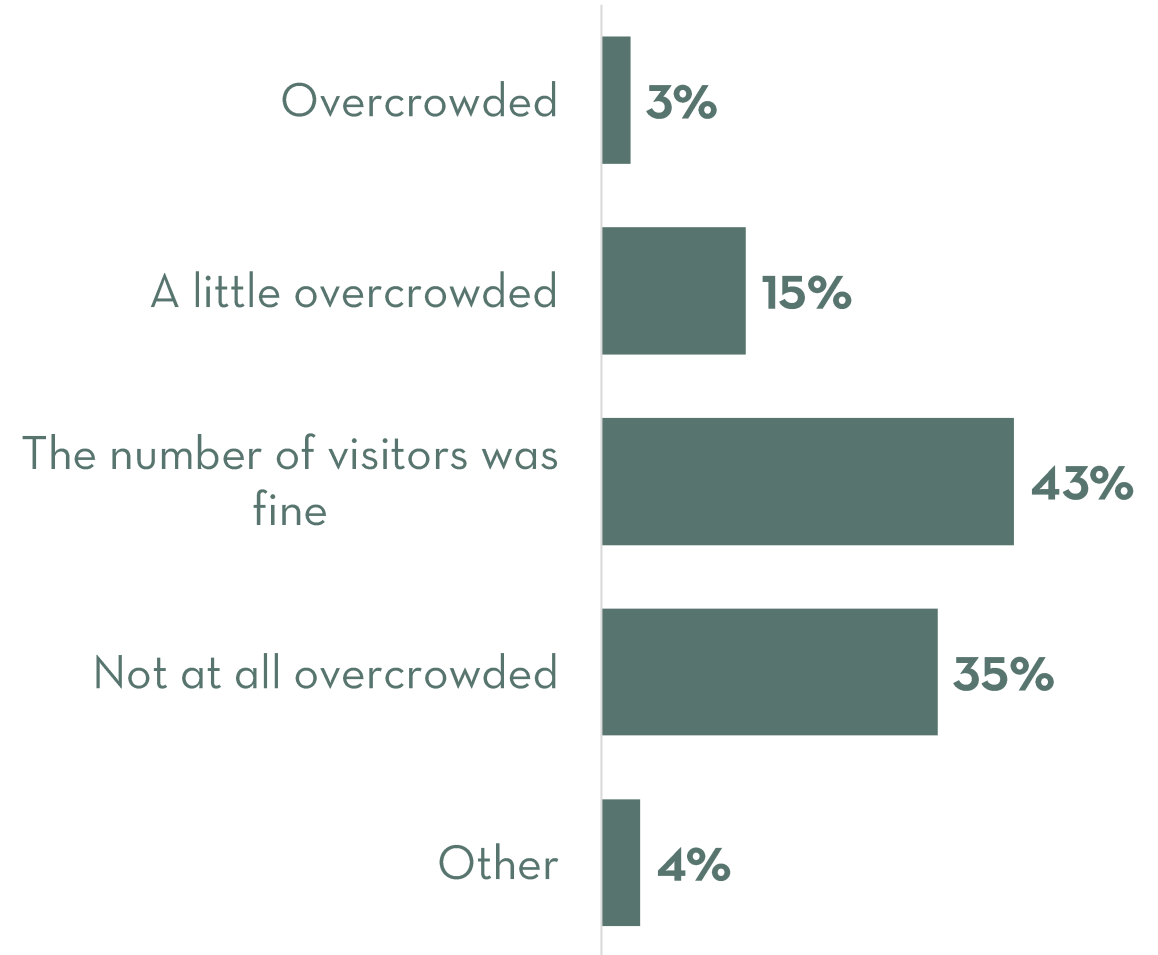


TRIP EXPECTATIONS



OVERCROWDING

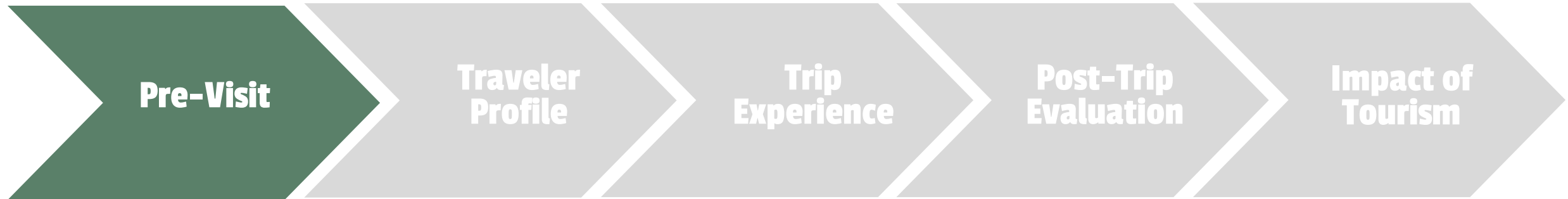
- » **43%** of visitors to the Maine Highlands thought the number of visitors during their trip was fine
- » **15%** of visitors though it was a little overcrowded



ANNUAL COMPARISONS



TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

Trip Planning Cycle	2021	2022
A week or less	15%	16%
2 - 3 weeks	16%	15%
1 - 2 months	28%	23%
3 - 4 months	18%	18%
5 - 6 months	9%	12%
7 months - 1 year	6%	8%
More than 1 year	8%	8%
Days in Planning Cycle	50	55

Booking Window	2021	2022
A week or less	20%	22%
2 - 3 weeks	19%	17%
1 - 2 months	30%	27%
3 - 4 months	15%	15%
5 - 6 months	7%	9%
7 months - 1 year	5%	6%
More than 1 year	4%	4%
Days in Booking Window	41	42

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2021	2022
Online search engines	32%	26%
Airline websites	20%	17%
Online travel agency	20%	13%
Hotel websites	11%	12%
TripAdvisor	11%	11%
VisitMaine.com	9%	10%
Airbnb	9%	10%
Facebook	9%	10%
Traveler reviews/blogs/stories	8%	9%
YouTube	7%	8%
VRBO/HomeAway	6%	6%
Instagram	6%	6%
Vacation rental websites	4%	5%
MaineTourism.com	6%	5%
Visit Maine social media	5%	4%
VisitBarHarbor.com	5%	4%
DowneastAcadia.com	3%	3%
DiscoverNewEngland.com	2%	2%
TheMaineHighlands.com	2%	2%
MainesMidCoast.com	2%	2%
VisitPortland.com	2%	2%
MaineLakesandMountains.com	3%	2%
Twitter	3%	2%
VisitAroostook.com	1%	1%
KennebecValley.org	1%	1%
TheMaineBeaches.com	2%	1%
Other	8%	7%
None	25%	29%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2021	2022
Advice from friends/family	35%	33%
Travel guides/brochures	10%	9%
Travel planning apps	10%	9%
Articles or travelogues	8%	8%
AAA	6%	7%
Travel books & magazines	10%	7%
Called the Maine Office of Tourism	3%	3%
Visitor Guide	4%	3%
Travel agent	4%	3%
Called local Chambers of Commerce	3%	2%
Called another Maine Tourism/Lodging Association	2%	2%
Visit Maine e-newsletter	3%	2%
Called local convention and visitors bureaus	3%	1%
Other	5%	4%
None	46%	47%

REASON FOR VISITING*

Reasons for Visiting	2021	2022
Visiting friends/relatives	38%	31%
Relax and unwind	28%	27%
Sightseeing/touring	25%	25%
Nature & bird watching	20%	19%
Active outdoor activities	12%	12%
Conference/meeting	6%	10%
Special occasion	11%	9%
Attractions	6%	6%
Snow activities	3%	6%
Water activities	5%	6%
Shopping	5%	6%
Special event	3%	5%
Beach	4%	3%
Culture/museums/history	4%	3%
Sporting event	1%	1%
Astrotourism	1%	1%
Other	5%	9%

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2021	2022
No other states/provinces	72%	72%
New Hampshire	10%	10%
Vermont	8%	7%
Massachusetts	6%	6%
New York	6%	6%
Connecticut	3%	3%
Rhode Island	4%	3%
New Brunswick	2%	3%
Nova Scotia	2%	3%
Ontario	2%	2%
Prince Edward Island	2%	2%
Quebec	2%	2%
Newfoundland and Labrador	1%	1%
Other	5%	6%

ADVERTISING/PROMOTIONS

Recalled Advertising	2021	2022
Yes	38%	35%
No	45%	46%
Not sure	17%	19%

Influenced by Advertising	2021	2022
Yes	NA	17%

ADVERTISING/PROMOTIONS*

Sources of Advertising Noticed*	2021	2022
Social media	41%	38%
Internet	35%	37%
Magazine	18%	20%
Cable or satellite television	18%	16%
Maine travel/visitor guide	12%	12%
Radio	11%	12%
VisitMaine.com	11%	11%
Newspaper	12%	11%
Traveler reviews/blogs	13%	10%
Online streaming service	10%	8%
AAA	4%	8%
Brochure	7%	7%
Music/podcast streaming	8%	6%
Billboard	7%	4%
Deal – based promotion	4%	2%
Other	5%	6%
Not sure	1%	3%

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2021	2022
Maine	17%	18%
New England	13%	13%
Mid-Atlantic	23%	19%
Southeast	22%	20%
Southwest	4%	5%
Midwest	11%	10%
West	6%	6%
Canada	3%	7%
International	1%	2%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2021	2022
Maine	18%	18%
Florida	10%	9%
Massachusetts	5%	6%
New York	8%	6%
New Brunswick	2%	5%
New Hampshire	3%	4%
Georgia	2%	3%
New Jersey	3%	3%
North Carolina	5%	3%
Pennsylvania	4%	3%
Texas	3%	3%
Virginia	3%	3%

ORIGIN MARKET

Origin Markets	2021	2022
New York City ¹	8%	7%
Washington DC - Baltimore ²	6%	5%
Boston	3%	3%
Atlanta	2%	2%
Dallas - Ft. Worth	1%	2%
Chicago	2%	2%
Orlando	2%	2%
Miami - Ft. Lauderdale	2%	2%
Philadelphia	2%	2%
Bangor	1%	2%
Portland, ME	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	30%	27%
As a couple	32%	35%
As a family	25%	23%
With business associates	2%	4%
In a tour group	<1%	<1%
With other couples/friends	10%	11%
Other	1%	<1%
Average Travel Party Size	2.4	2.5

TRAVEL WITH CHILDREN*

Children in Travel Party	2021	2022
No children	83%	86%
Children younger than 6	6%	4%
Children 6 – 12	8%	7%
Children 13 – 17	9%	7%

Gender	2021	2022
Male	52%	51%
Female	48%	49%

DEMOGRAPHIC PROFILE

Age	2021	2022
Under 25	11%	10%
25 – 34	21%	17%
35 – 44	18%	17%
45 – 54	17%	19%
55 – 65	18%	20%
Over 65	15%	17%
Median Age	45	48

Race/Ethnicity	2021	2022
White	87%	87%
Black	4%	4%
Asian	4%	4%
Hispanic	3%	3%
Indigenous	1%	1%
Other	1%	1%

LIFESTYLE PROFILE

Marital Status	2021	2022
Single/widowed	29%	29%
Married/living with partner	71%	71%

Employment Status	2021	2022
Employed full-time	57%	58%
Employed part-time	9%	8%
Contract/freelance/temporary employee	6%	5%
Retired	17%	19%
Not currently employed	4%	4%
Student	7%	6%

LIFESTYLE PROFILE

Household Income	2021	2022
Less than \$25,000	6%	7%
\$25,000 - \$49,999	11%	11%
\$50,000 - \$74,999	16%	15%
\$75,000 - \$99,999	19%	17%
\$100,000 - \$149,999	21%	21%
\$150,000 - \$199,999	14%	13%
\$200,000 - \$249,999	5%	5%
\$250,000 or more	8%	11%
Median Household Income	\$97,400	\$100,000

LIFESTYLE PROFILE

Educational Attainment	2021	2022
High school or less	11%	10%
Some college or technical school	18%	18%
College or technical school graduate	43%	44%
Graduate school	28%	28%

NEW & RETURNING VISITORS

Previous Trips to the Maine	2021	2022
This is my first time	26%	27%
2 - 5 times	28%	27%
6 - 10 times	14%	12%
11+ times	32%	34%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2021	2022
Drove to Maine	44%	74%
Flew into Bangor Intl Airport	38%	14%
Flew into Portland Intl Jetport	5%	3%
Flew into Boston Logan Intl	2%	2%
Took a motor coach tour or bus	2%	2%
Flew into Northern Maine Regional Airport	1%	1%
Flew into another airport	3%	1%
Traveled by train	1%	1%
Other	4%	2%

LENGTH OF STAY

Nights Stayed	2021	2022
Not staying overnight	25%	11%
1 night	5%	6%
2 nights	9%	10%
3 nights	9%	13%
4 nights	10%	10%
5+ nights	42%	50%
Average Length of Stay	5.2	6.8

ACCOMMODATIONS

Accommodations	2021	2022
Hotel/motel/resort	24%	27%
Friends/family home	22%	22%
Vacation rental home	9%	11%
Personal second home	7%	11%
Bed & Breakfast/Inn	5%	5%
Campground/RV Park	4%	4%
Wilderness camping	3%	3%
Sporting camp/wilderness lodge	1%	3%
Outdoor Outfitter	<1%	<1%
Other	<1%	3%
Not spending the night	25%	11%

BOOKING

Booking Methods	2021	2022
Directly with the hotel/condo	40%	39%
Online travel agency	22%	20%
Airbnb	13%	13%
Short term rental service	10%	8%
Vacation rental company	3%	4%
Offline travel agent	1%	3%
Group tour operator	1%	1%
Travel package provider	1%	1%
Other	9%	11%

IN-MARKET RESOURCES*

In-Market Resources	2021	2022
Navigation website/apps	38%	33%
Restaurant website/app	16%	18%
Personal social media	12%	15%
Visitor Information Centers	14%	12%
Hotel/resort website/app	11%	11%
Trip planning app	10%	10%
Materials from hotel/campground	11%	10%
VisitMaine.com	9%	9%
Destination social media	10%	9%
Booking website/app	8%	7%
Airline website/app	5%	6%
Chambers of Commerce	2%	2%
Other	4%	4%
None	38%	35%

ACTIVITIES*

Activities	2021	2022
Food/beverage/culinary	65%	59%
Touring/sightseeing	53%	48%
Active outdoor activities	53%	45%
Shopping	35%	33%
Water activities	26%	22%
History/culture	16%	17%
Astrotourism	8%	11%
Business conference/meeting	7%	7%
Entertainment/attractions	6%	6%
Other	10%	9%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2021	2022
Going to local brew pubs/craft breweries	31%	26%
Ate lobster	28%	23%
Ate other local seafood	26%	21%
Consumed other locally produced Maine foods	19%	14%
Enjoyed unique Maine food or beverages	15%	12%
Enjoying local food at fairs/festivals	7%	8%
Visited Farmer's Markets	4%	6%
Enjoyed high-end cuisine or five-star dining	9%	6%
Ate farm-to-table or organic cuisine	8%	5%
Other	3%	6%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2021	2022
Sightseeing	39%	35%
Enjoying the mountain views	33%	30%
Driving for pleasure	33%	28%
Enjoying the ocean views/rocky coast	30%	25%
Wildlife viewing/bird watching	16%	16%
Photography	14%	12%
Nature cruises or tours	12%	11%
Viewing fall colors	7%	8%
Tours of communities/local architecture	6%	7%
Other	1%	1%

SHOPPING ACTIVITIES*

Shopping Activities	2021	2022
Shopping at malls	18%	17%
Shopping for gifts/souvenirs	12%	9%
Outlet shopping	14%	9%
Shopping for antiques/local arts and crafts	5%	9%
Shopping for unique/locally produced goods	9%	9%
Shopping in downtown areas	12%	9%
Shopping for “Made in Maine” products	9%	8%
Other	1%	2%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2021	2022
Hiking/climbing/backpacking	36%	30%
Exploring State and National Parks	28%	21%
Camping	6%	6%
Snowmobiling	7%	6%
Snowshoeing	3%	4%
Bicycling touring	4%	3%
Riding all-terrain vehicles	5%	3%
Hunting	4%	3%
Alpine skiing/snowboarding	7%	3%
Nordic skiing	1%	2%
Mountain/Fat Biking	2%	1%
Other	4%	3%

ENTERTAINMENT ACTIVITIES*

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

WATER ACTIVITIES*

Water Activities	2021	2022
Fishing	12%	11%
Canoeing/kayaking	13%	10%
Motor boating	11%	9%
Outdoor swimming	10%	8%
Going to the beach	8%	7%
Pool swimming	3%	3%
Sailing	3%	2%
Water skiing/jet skiing	3%	2%
White water rafting	1%	1%
Surfing	<1%	1%
Other	2%	1%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2021	2022
Visit historic sites/museums	9%	9%
Get to know the local people and/or culture	6%	7%
Visit art museums/local artisan studios	6%	3%
Attend popular music concerts/events	2%	3%
Painting/drawing/sketching	4%	3%
Attend operas/classical music events	2%	2%
Attend plays/musicals/theatrical events	2%	1%
Other	1%	2%

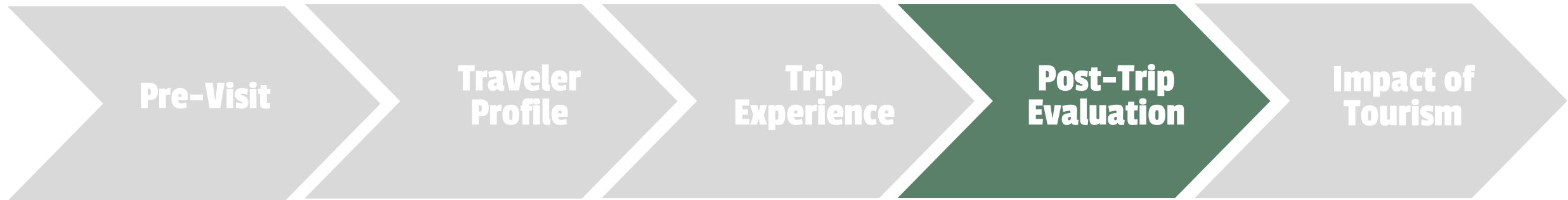
OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2021	2022
No other states/provinces	78%	76%
New Hampshire	11%	11%
Massachusetts	8%	8%
New York	7%	6%
Vermont	5%	5%
Connecticut	3%	3%
New Brunswick	1%	3%
Rhode Island	3%	2%
Newfoundland and Labrador	1%	1%
Nova Scotia	1%	1%
Ontario	1%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
Other	3%	3%

TRAVELING IN MAINE*

Maine Regions Visited	2021	2022
No other regions	23%	32%
Downeast & Acadia	38%	37%
Midcoast & Islands	17%	17%
Greater Portland & Casco Bay	20%	14%
Kennebec Valley	16%	11%
Maine Lakes & Mountains	13%	11%
The Maine Beaches	14%	11%
Aroostook County	13%	10%
Other	<1%	1%

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2021	2022
Would recommend Maine	97%	95%
Would not recommend Maine	1%	1%
Not sure	2%	4%

Recommending Regions	2021	2022
Definitely recommend region	73%	71%
Probably would recommend region	11%	16%
Would not recommend region	1%	1%
Not sure	15%	12%

SATISFACTION

Satisfaction	2021	2022
Very satisfied	NA	72%
Satisfied	NA	23%
Dissatisfied	NA	1%
Don't know	NA	4%

RETURNING TO MAINE

Returning to Maine	2021	2022
Definitely will return	79%	75%
Probably will return	16%	18%
Probably will not return	1%	1%
Not sure	4%	6%

TRIP EXPECTATIONS

Exceeded Expectations	2021	2022
Friendliness of people	57%	60%
Activities & attractions	56%	56%
Authentic & unique communities	51%	50%
Customer service	50%	50%
Lodging	45%	43%
Restaurants	46%	43%
Value for your money	42%	37%
Shopping	39%	35%

OVERCROWDING

Overcrowding	2021	2022
Overcrowded	NA	3%
A little overcrowded	NA	15%
The number of visitors was fine	NA	43%
Not at all overcrowded	NA	35%
Other	NA	4%

STUDY METHODS



METHODOLOGY



Visitor Tracking

584 interviews were completed with visitors to the Maine Highlands 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 Maine Highlands is a function of direct spending by visitors to the Maine Highlands, 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 the Maine Highlands. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. the Maine Highlands's multiplier is 1.62.

MAINE HIGHLANDS

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022

Downs & St. Germain Research
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