

KENNEBEC VALLEY

2023 Fall Visitor Tracking Report

SEPTEMBER – NOVEMBER 2023

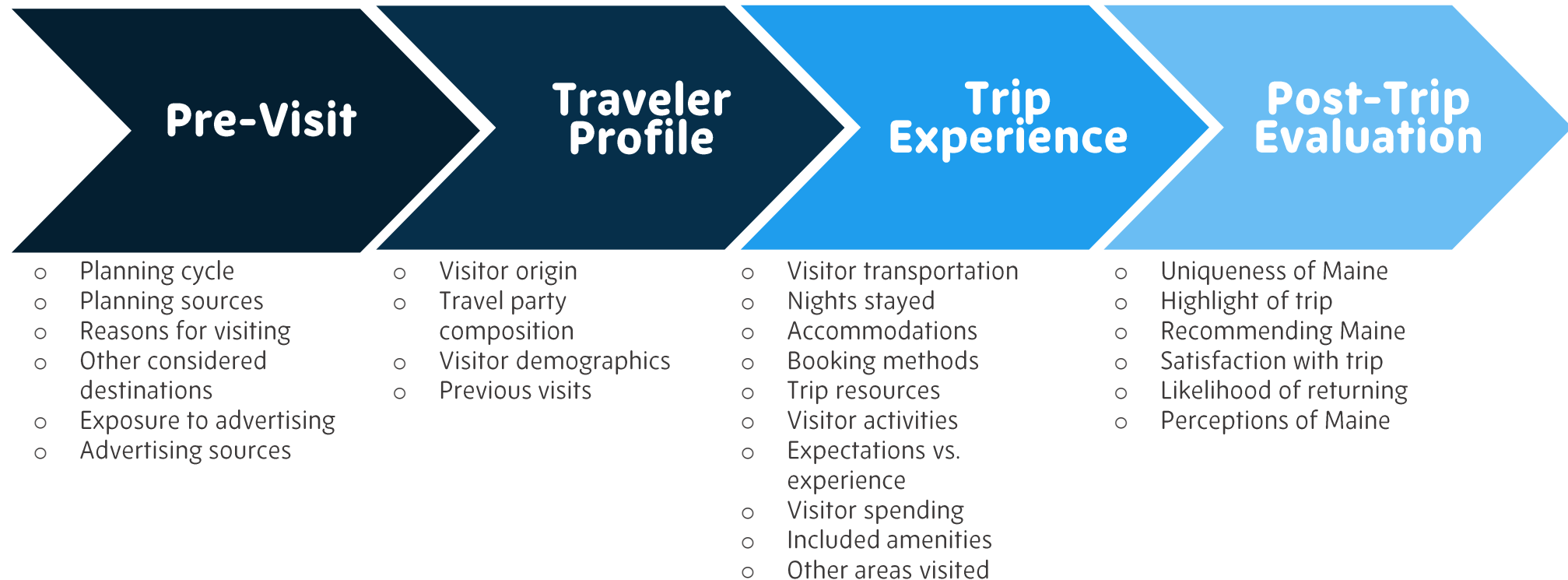


STUDY OBJECTIVES: VISITOR JOURNEY

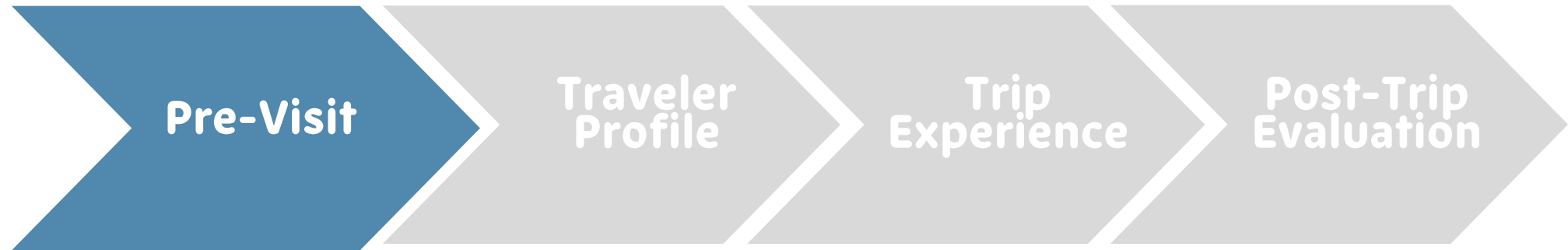
This report presents information about visitors to Maine from September to November 2023.

In the report, we follow the visitors in their journeys.

Along the way, we examine profiles of visitors, their experiences in our destination, and how they evaluate experiences in Maine.



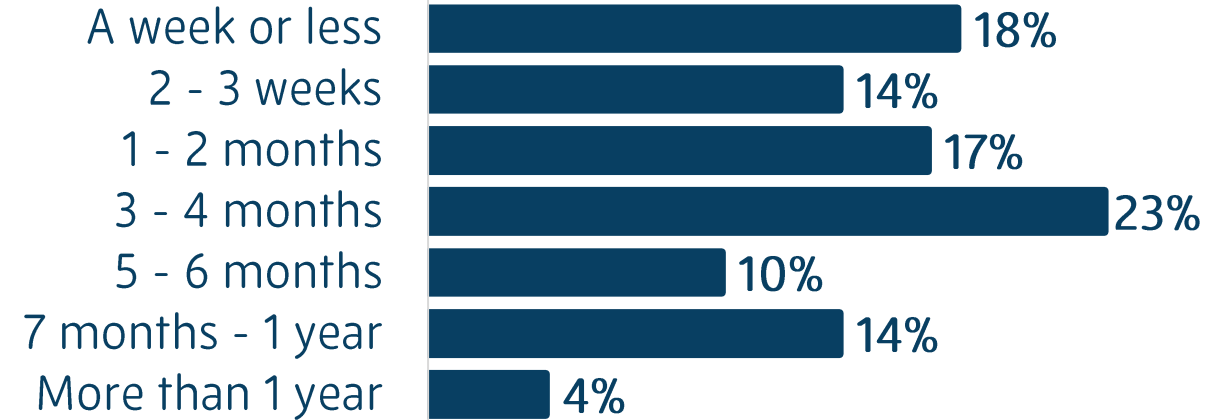
VISITOR JOURNEY: PRE-VISIT



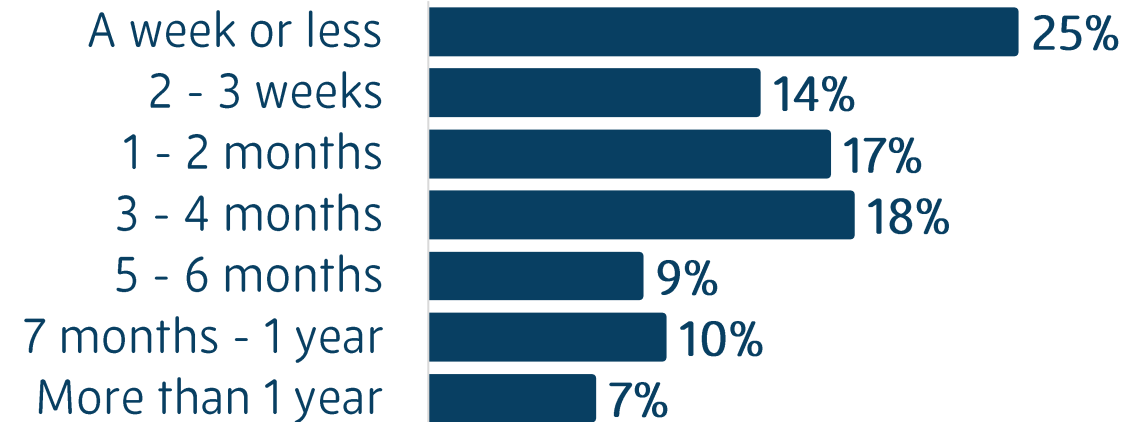
TRIP PLANNING CYCLE

- » Typical visitors began planning their trip **61 days** in advance
- » **68%** of visitors started planning their trip a month or more in advance
- » Typical visitors booked their accommodations **49 days** in advance
- » **56%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

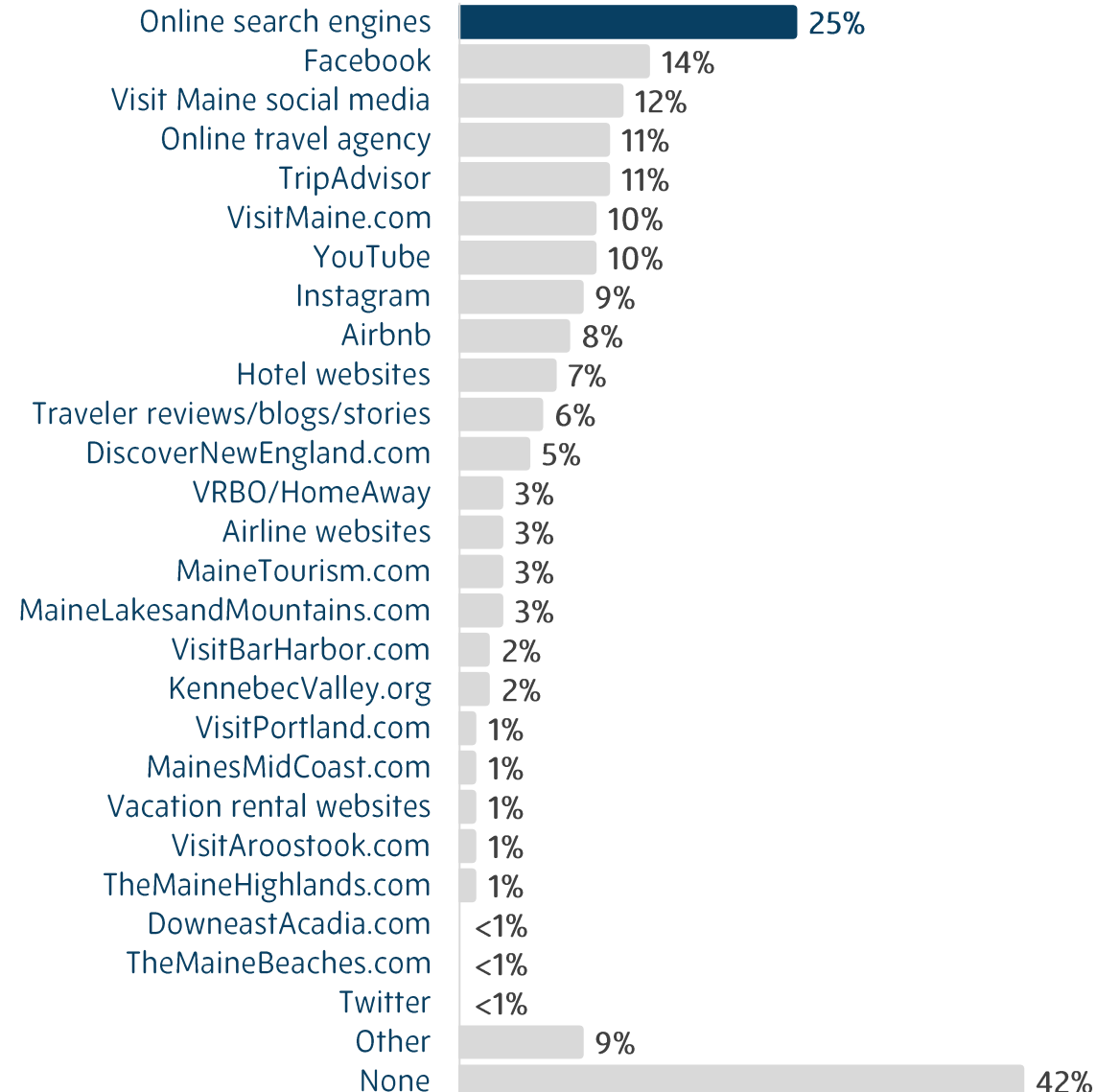


Booked Accommodations/Made Trip Decisions



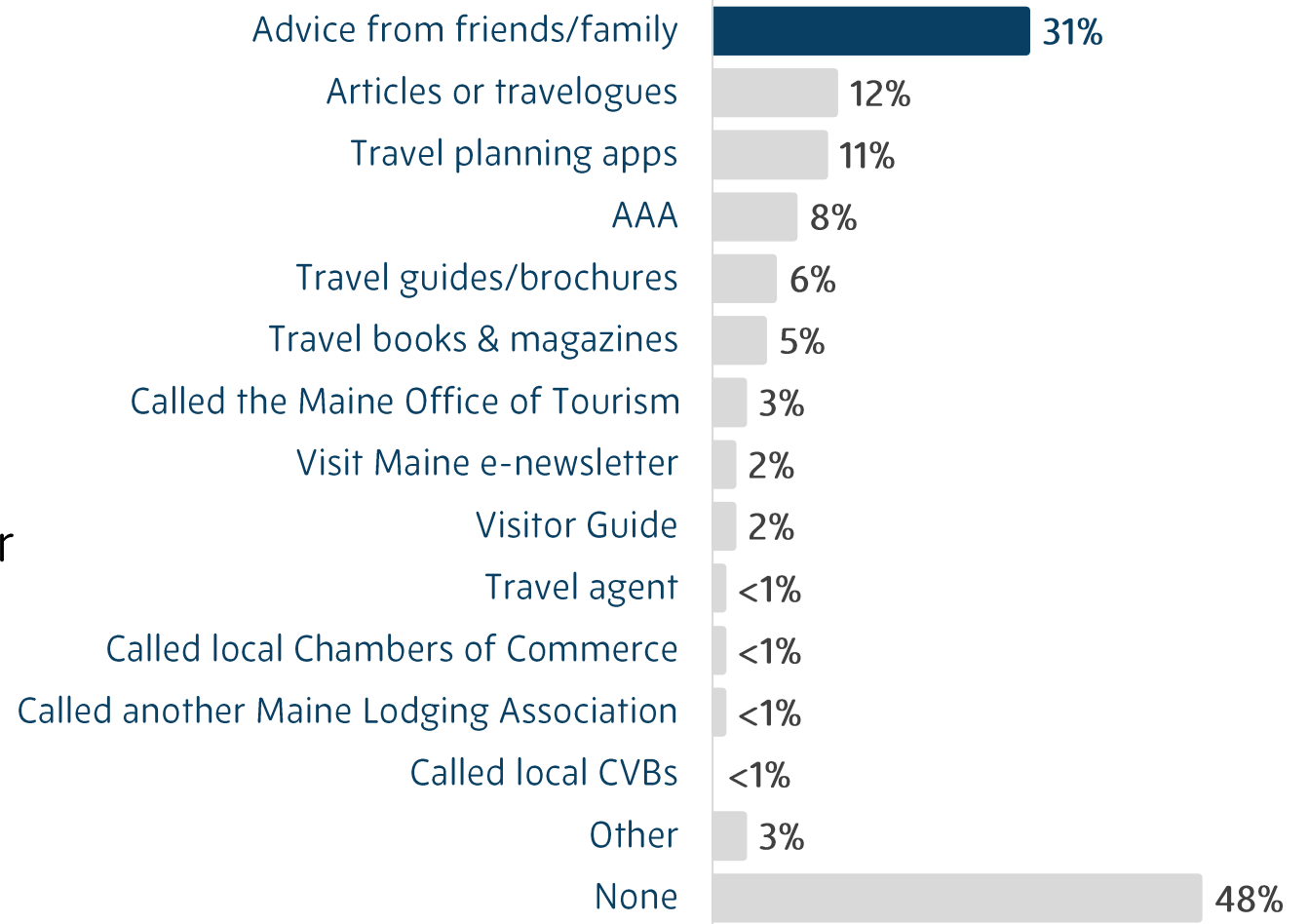
ONLINE TRIP PLANNING SOURCES*

- » Nearly **3 in 5** visitors used one or more online resources to help them plan their trip in Maine
- » **1 in 4** visitors used an online search engine, such as Google, to help them plan their trip in Maine



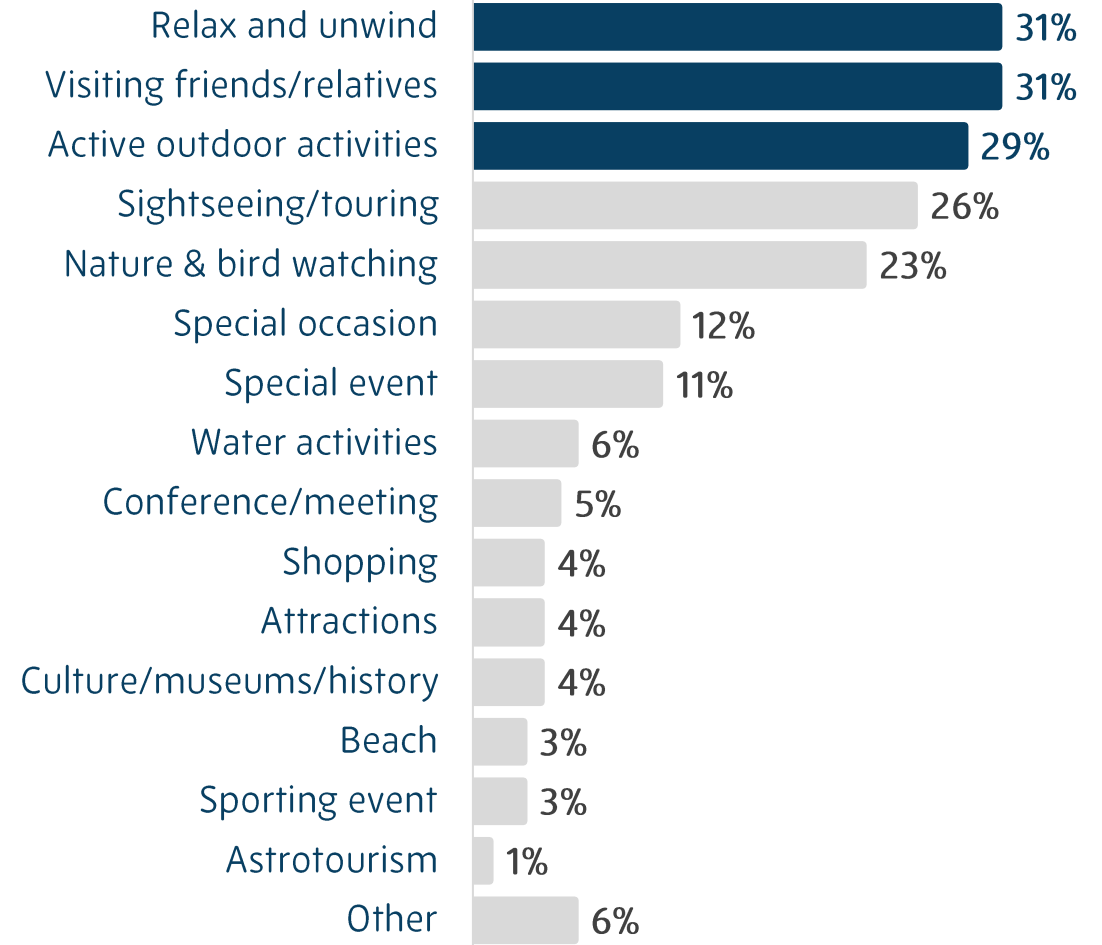
OTHER TRIP PLANNING SOURCES*

- » Over **3 in 10** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » Nearly **half** of visitors did not use any other resources to help them plan their trip in Maine



REASONS FOR VISITING*

- » Nearly **1 in 3** visitors came to Maine to relax & unwind and to visit friends and relatives
- » Nearly **3 in 10** came to for active outdoor activities



TV SHOWS & FILM*

- » **8%** of visitors said a TV show or film inspired their trip to Maine
- » **2 in 5** visitors who were inspired by a TV show or film said I made them think about Maine as a place to visit
- » **16%** of visitors who were NOT inspired by a TV show or film to visit Maine said they visited the location of a TV show or film while in Maine

Base: 8% of visitors who were inspired by a TV show or film

Seeing Maine in a film or TV show made me think about Maine as a place to visit

40%

Visiting a location of a TV show or film was one of the activities I engaged in while in Maine

30%

I was considering Maine as a destination option and visiting a location related to a TV show or film was the deciding factor

20%

Visiting a location related to a TV show or film was the main reason I visited Maine

<1%

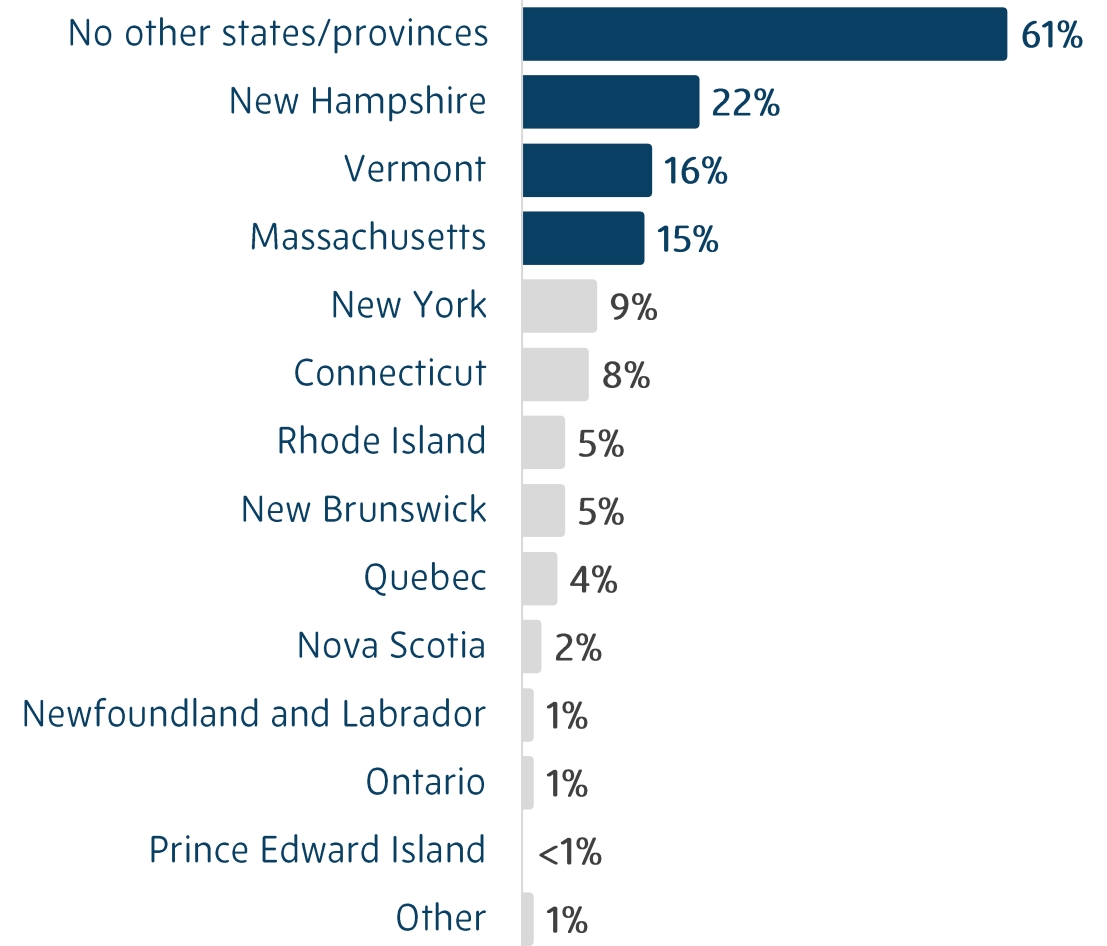
Something else

10%

*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

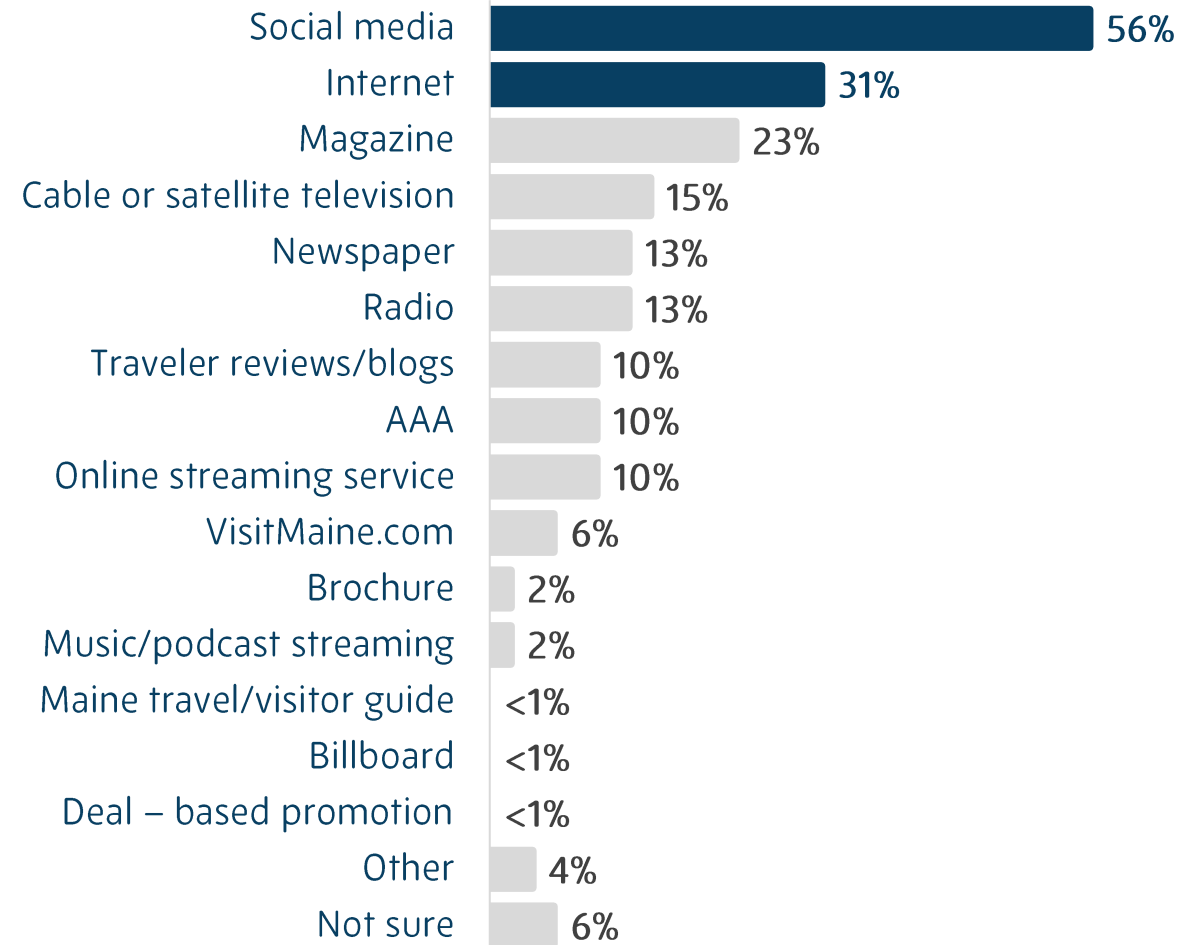
- » Over **3 in 5** visitors considered visiting **ONLY** Maine while planning their trips
- » Visitors were more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces
- » Nearly **1 in 4** visitors also considered New Hampshire
- » Around **1 in 6** also considered Vermont or Massachusetts



PRE-TRIP RECALL OF ADVERTISING*

- » Over **2 in 5** visitors noticed advertising or promotions for Maine prior to their trip
- » Visitors who recalled this advertising primarily saw it on social media or the Internet
- » This information influenced **23% of all** visitors to visit Maine

Base: 41% of visitors who noticed advertising

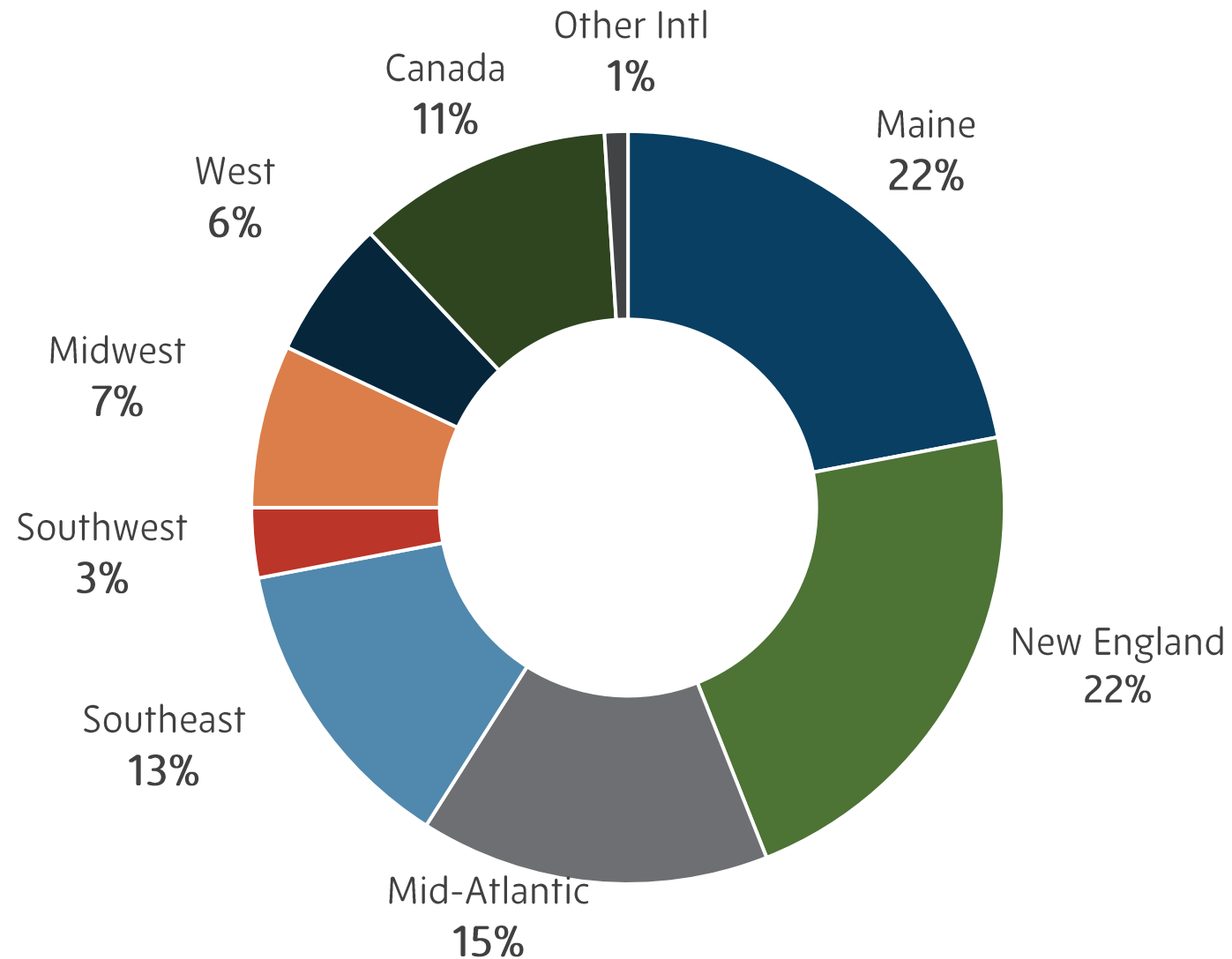


*Multiple responses permitted.

VISITOR JOURNEY: TRAVELER PROFILE



VISITOR ORIGINS



Kennebec Valley
12

TOP ORIGIN STATES & PROVINCES

- » **79%** of visitors traveled to/within Maine from 13 U.S. states and Canadian provinces
- » Over **1 in 5** visitors were residents of Maine traveling throughout the state

State/Province	Percent
Maine	22%
Massachusetts	12%
New York	7%
Quebec	6%
Florida	5%
New Hampshire	5%
New Jersey	4%
Pennsylvania	3%
Georgia	3%
Oregon	3%
South Carolina	3%
Vermont	3%
Ontario	3%

TOP ORIGIN MARKETS

- » Half of visitors traveled from 16 U.S. and international markets
- » 11% of visitors traveled to Maine from Boston and New York City

Market	Percent
Boston	6%
New York City ¹	5%
Augusta	5%
Quebec City, CAN	4%
Philadelphia	3%
Atlanta	3%
Tampa - Clearwater - St. Petersburg	3%
Auburn - Lewiston	3%
Portland, ME	3%
Chicago	2%
Dallas - Ft. Worth	2%
Washington DC - Baltimore ²	2%
Miami - Ft. Lauderdale	2%
Bangor	2%
Waterville	2%
Waterboro	2%

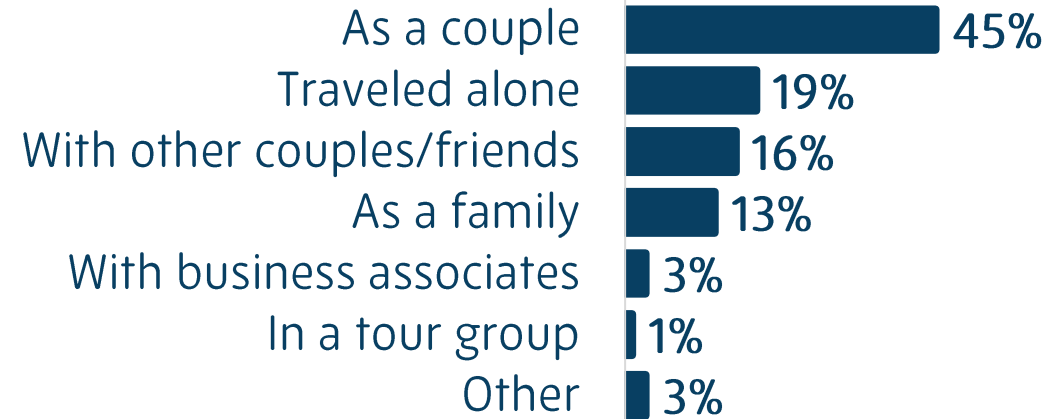
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

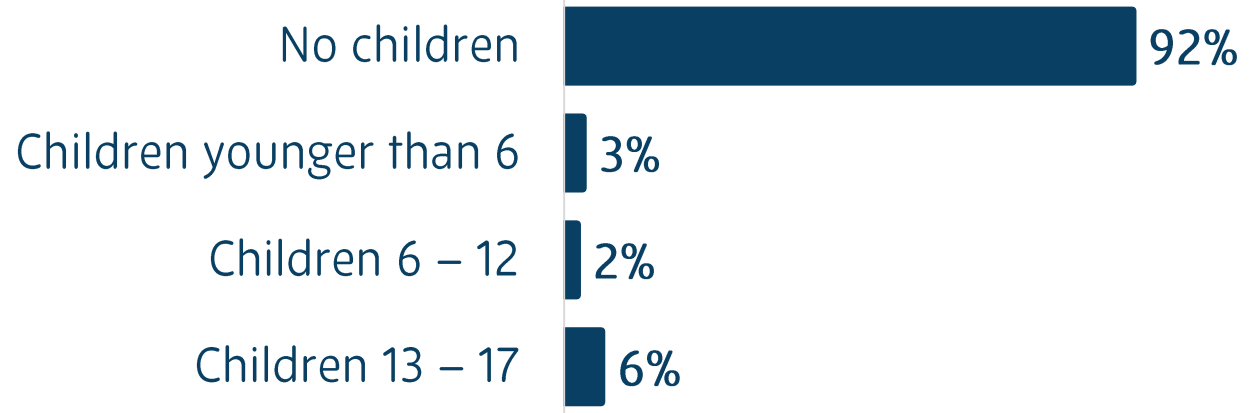
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.5** people
- » Over **2 in 5** visitors traveled as a couple
- » **8%** of visitors traveled with one or more children in their travel party

Travel Party Composition



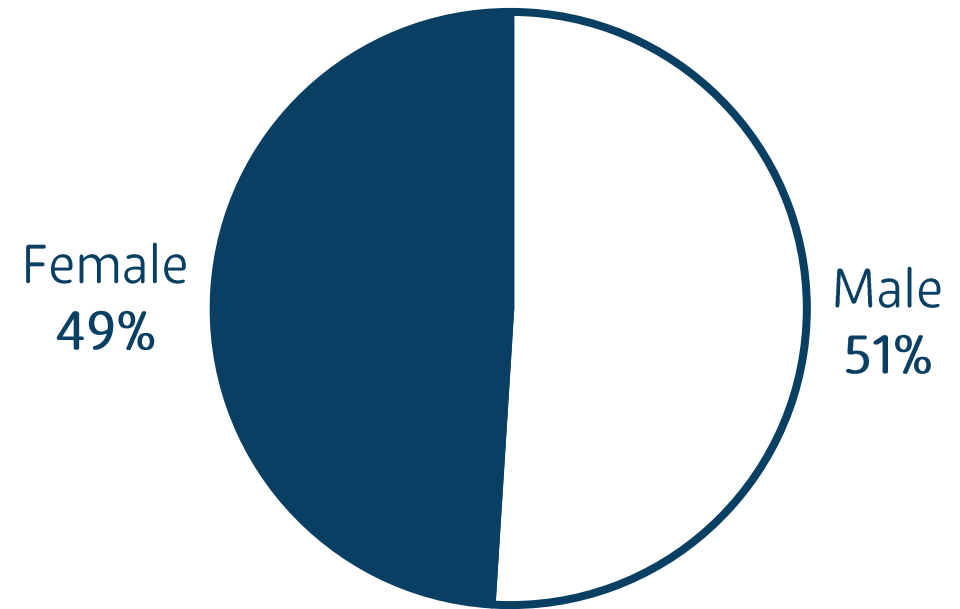
Children in Travel Party*



*Multiple responses permitted.

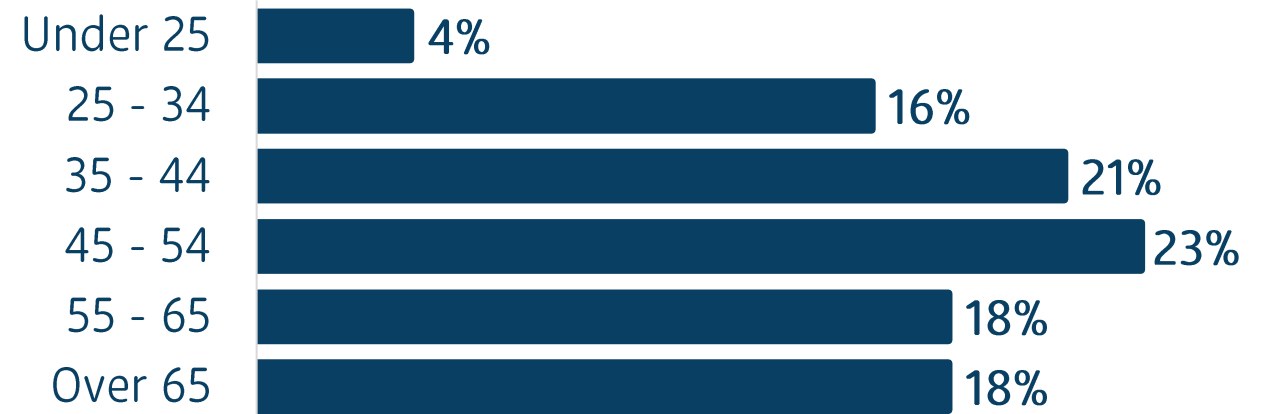
GENDER

» **Half** visitors to Maine interviewed were female/male



AGE

» The average age of visitors to Maine is 49 years old



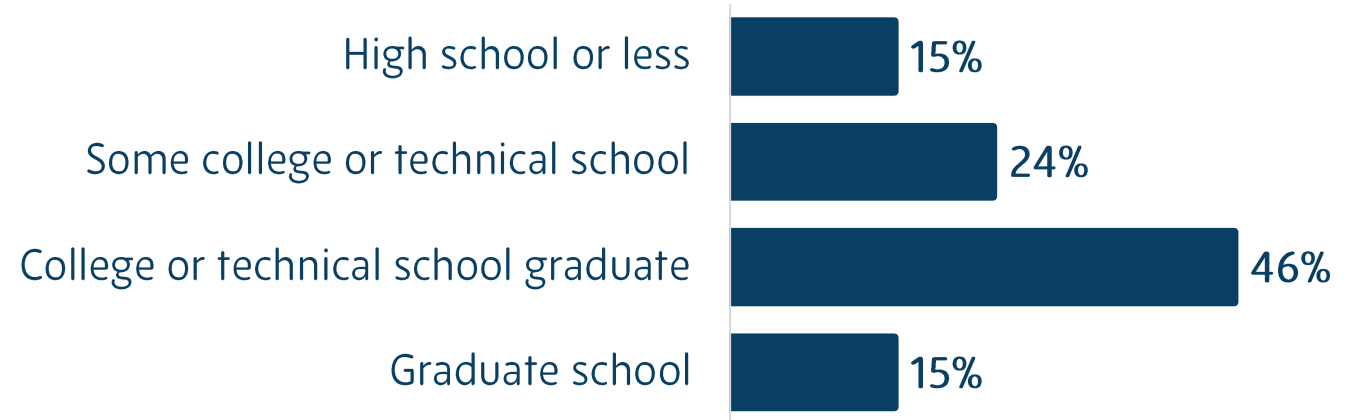
RACE & ETHNICITY

» Over 9 in 10 visitors to Maine were white



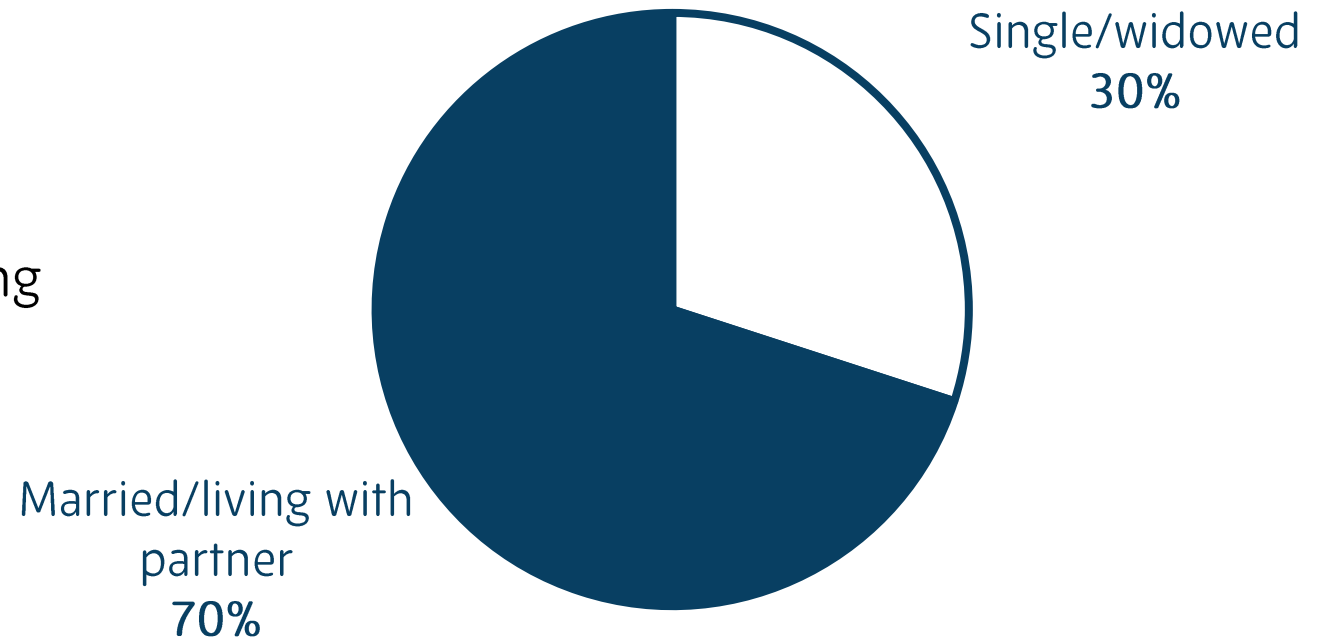
EDUCATIONAL ATTAINMENT

- » Over **3 in 5** visitors have a college/technical school degree or higher



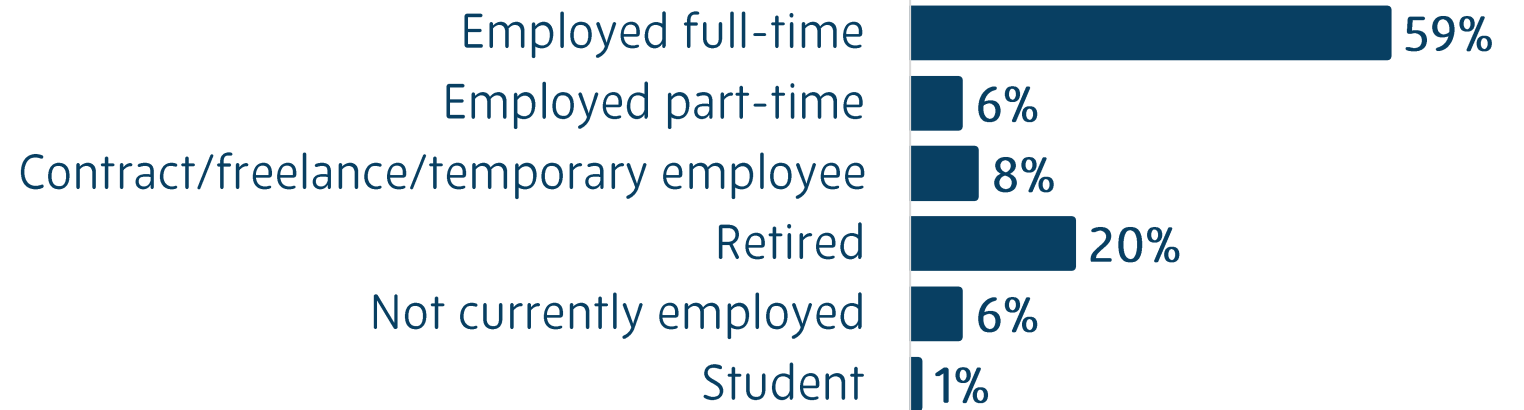
MARITAL STATUS

» **7 in 10** visitors to Maine were married or living with their partner



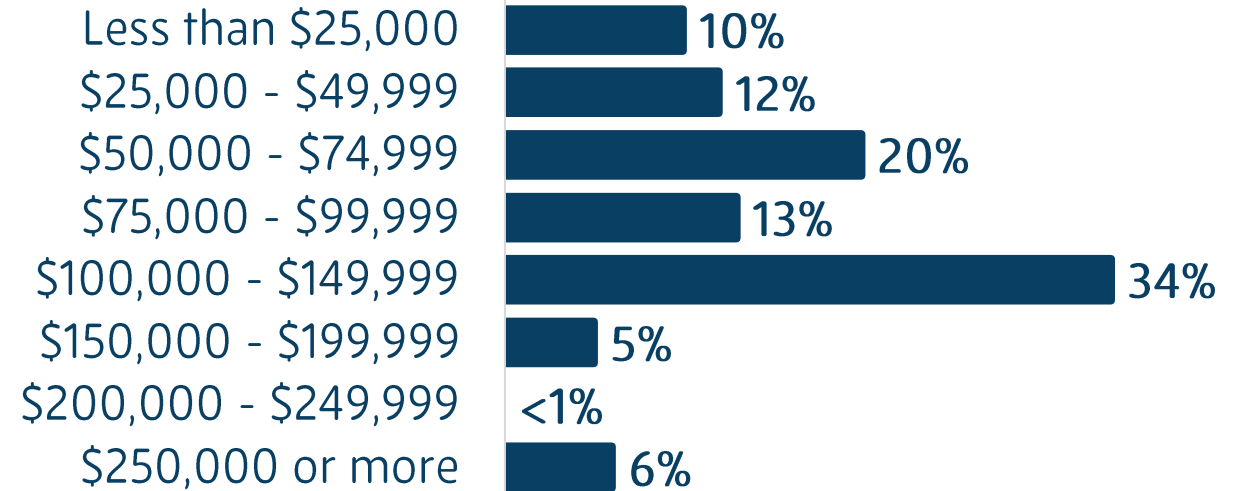
EMPLOYMENT STATUS

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



HOUSEHOLD INCOME

- » The average household income of visitors to Maine is **\$90,400** per year
- » **11%** of visitors to Maine earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » 13% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 42% had previously traveled in Maine more than 10 times

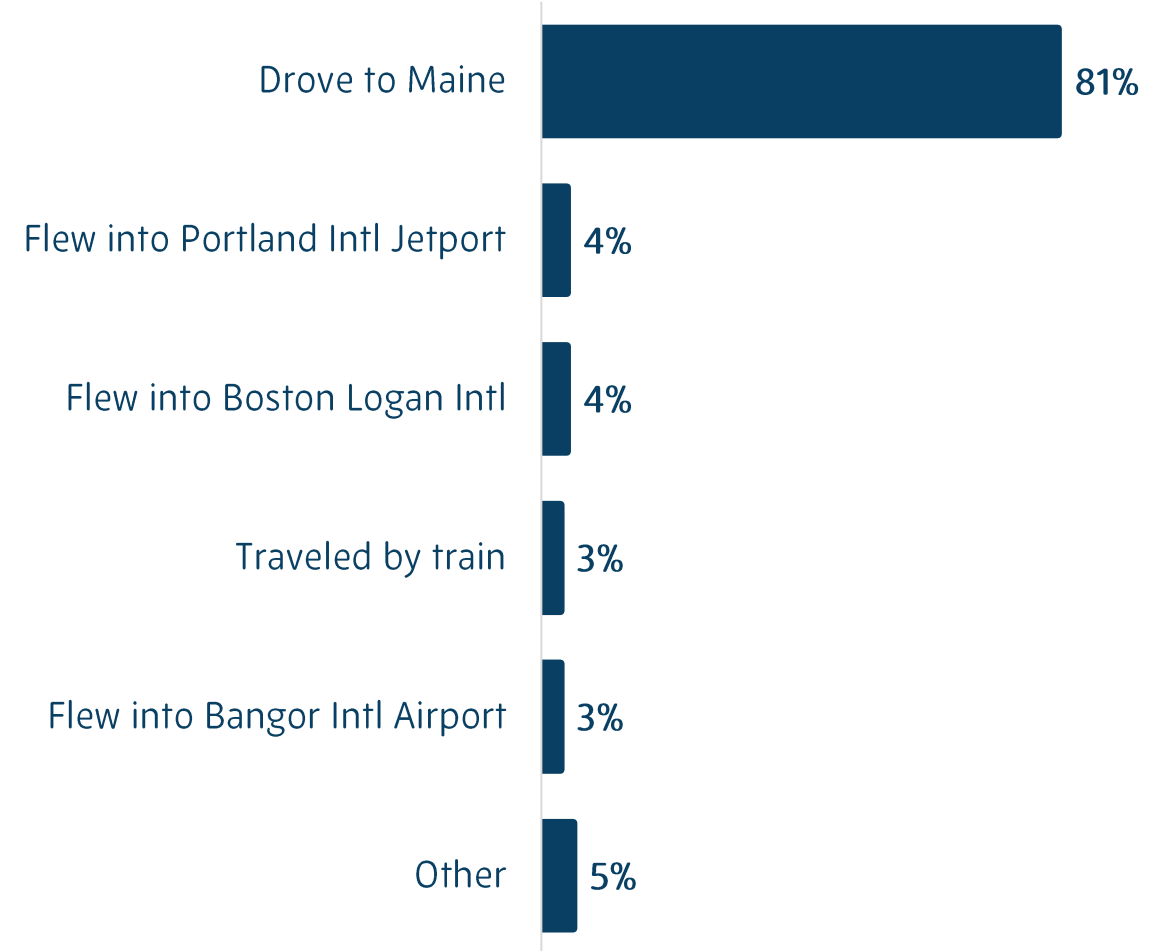


VISITOR JOURNEY: TRIP EXPERIENCE



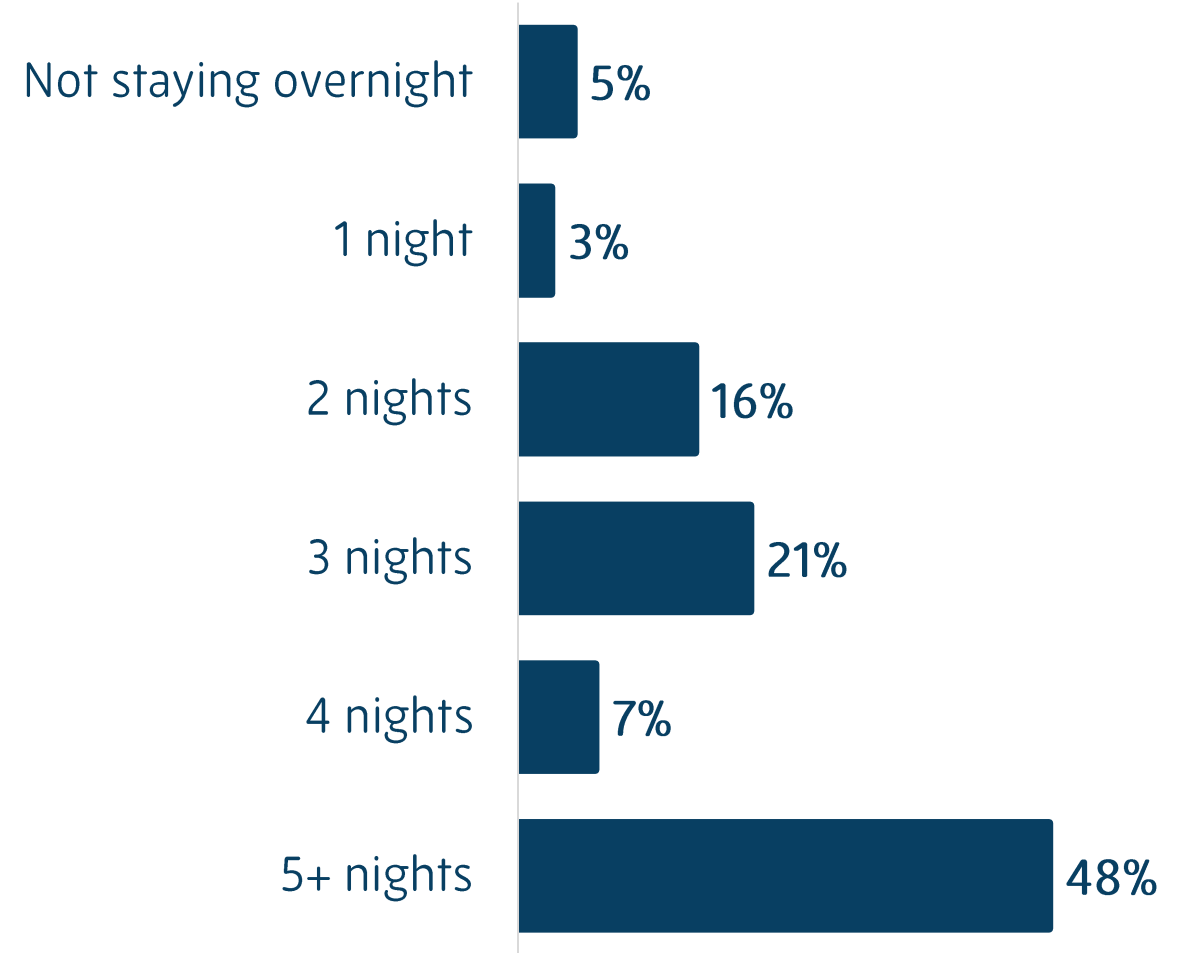
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **81%** choosing to travel by car over plane, motor coach/bus, or train



NIGHTS STAYED

- » 95% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed 7.6* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 8.1 nights in Maine on their trips

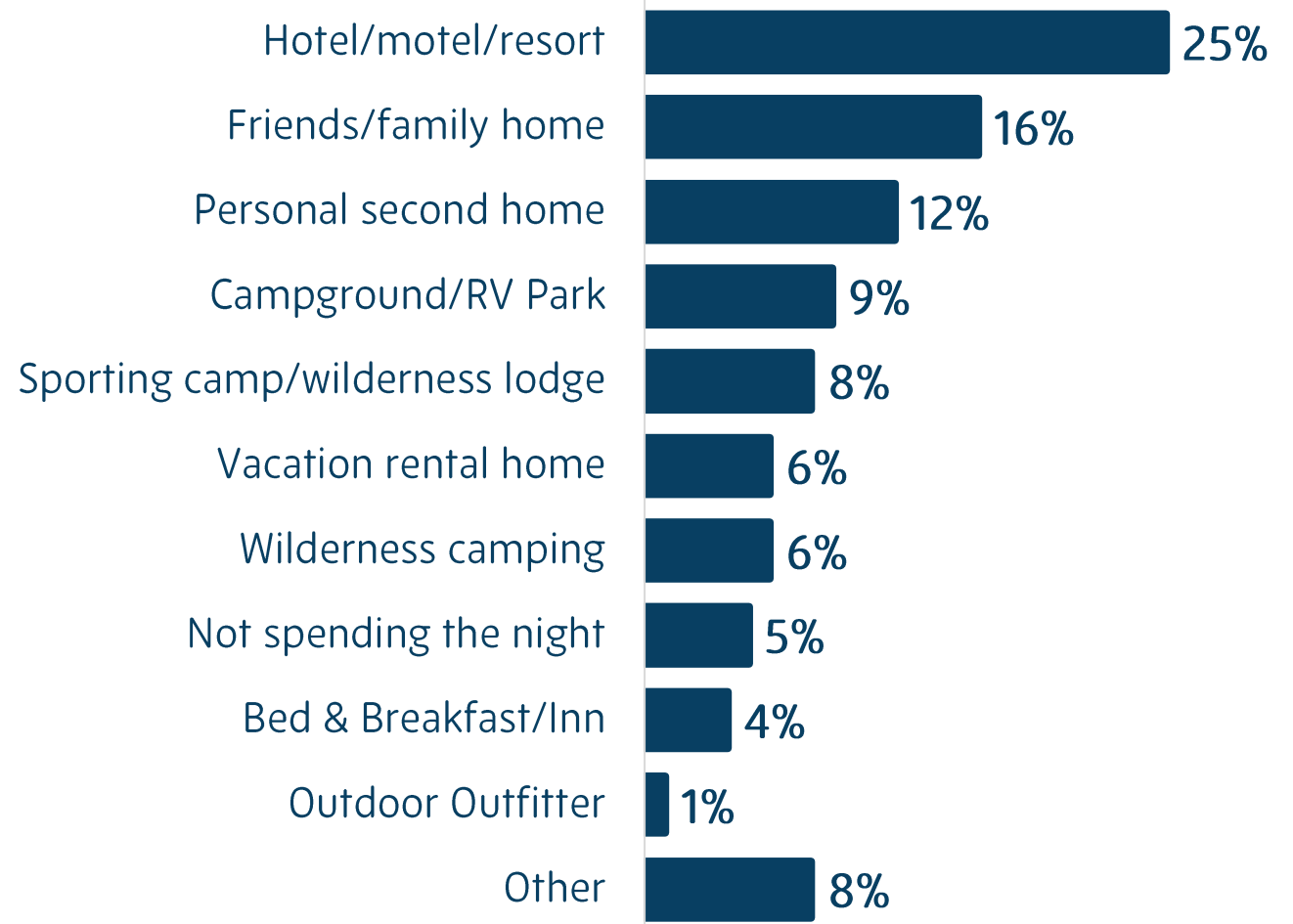


*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Kennebec Valley

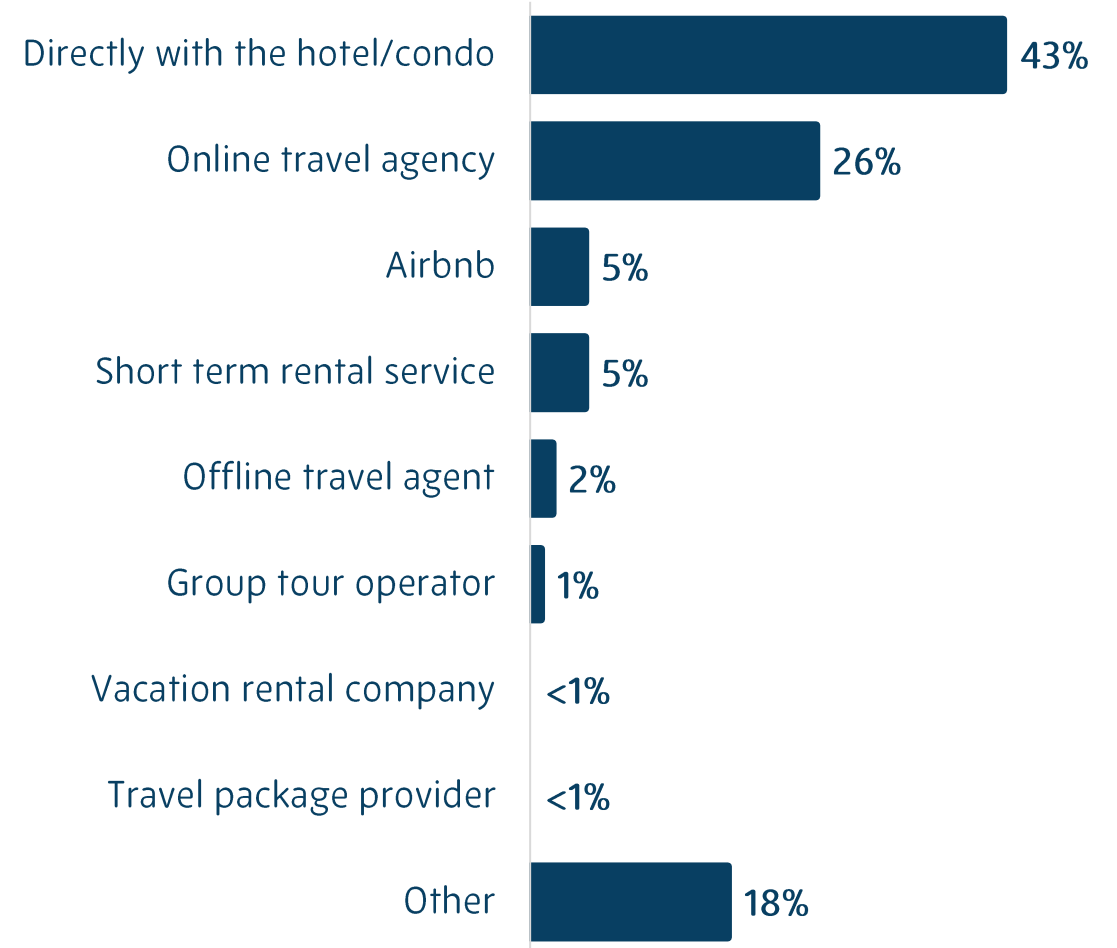
ACCOMMODATIONS

» 1 in 4 visitors stayed in a hotel/motel/resort on their trip to Maine



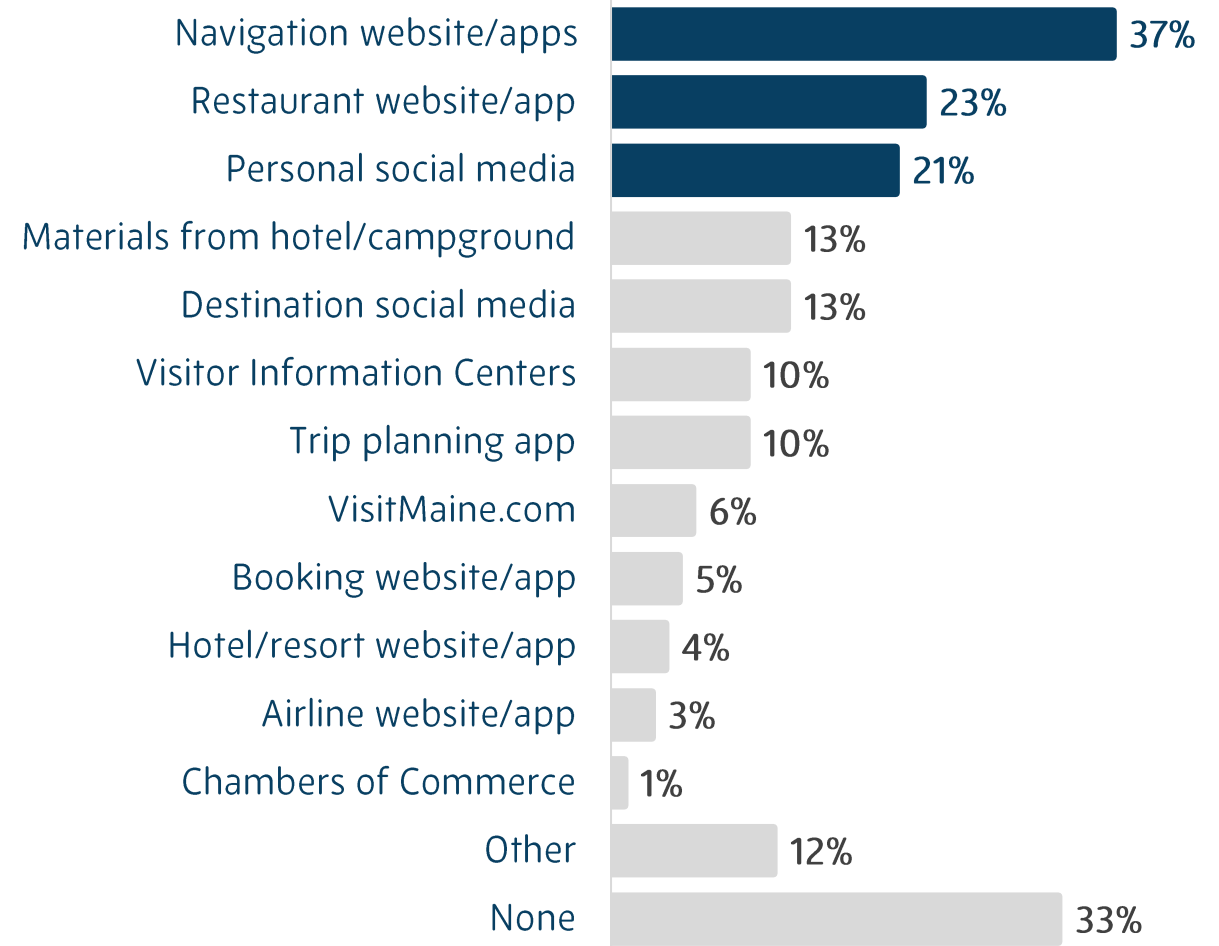
BOOKING METHODS

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



IN-MARKET VISITOR RESOURCES*

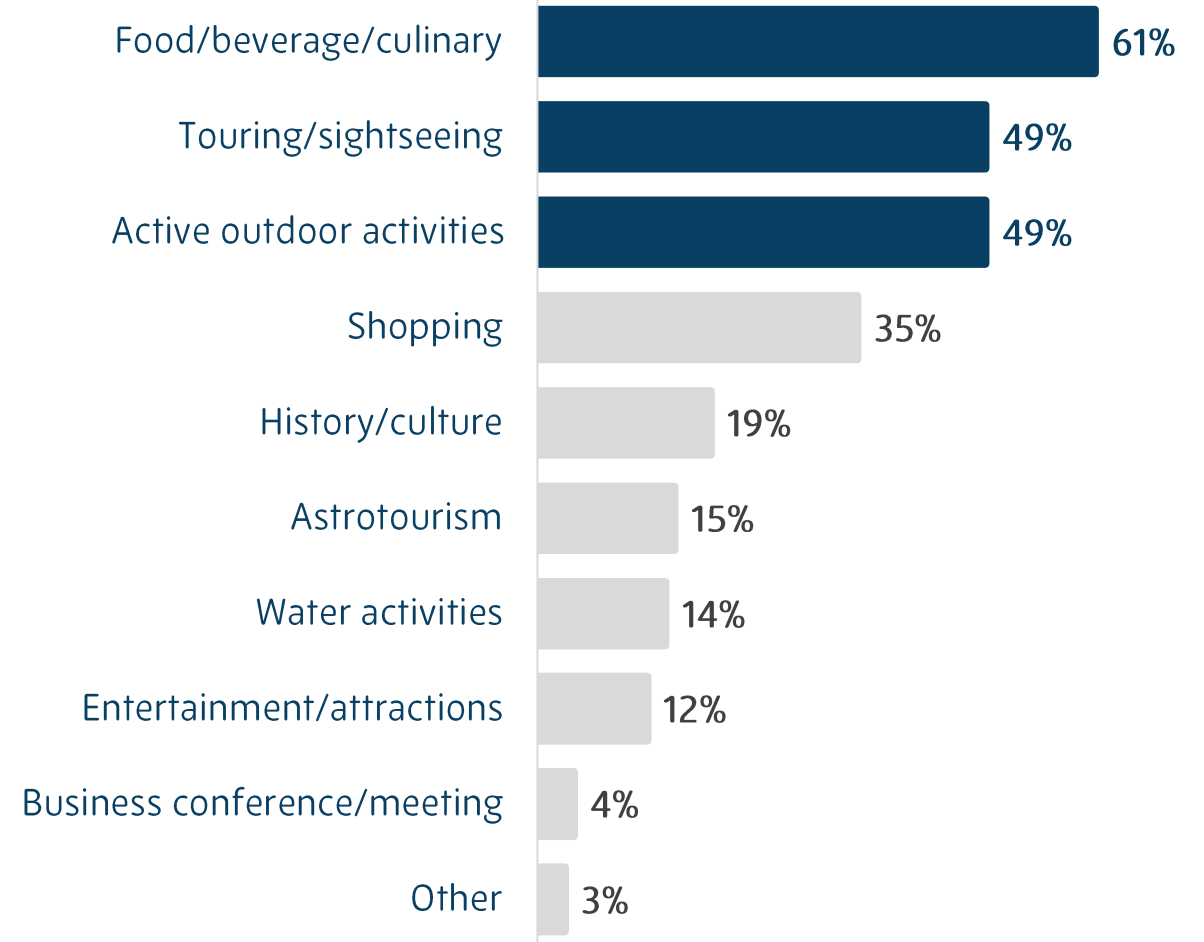
- » Visitors were most likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Over **1 in 5** visitors went to restaurant websites or apps or used their own personal social media
- » **1 in 3** visitors did not use any resources to plan activities while they were in-market



*Multiple responses permitted.

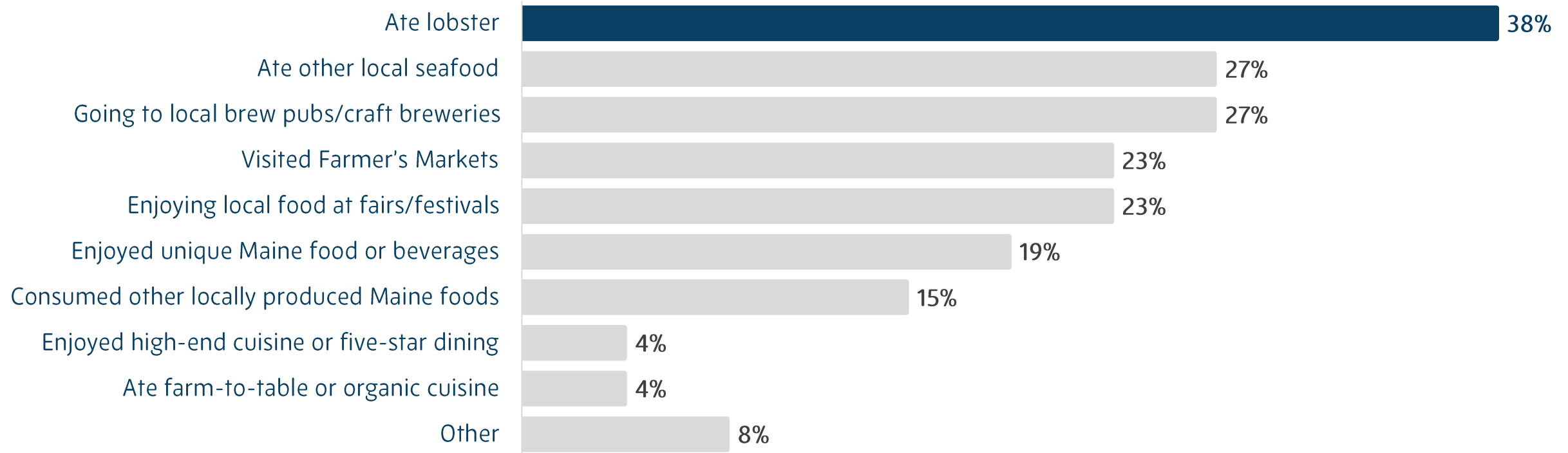
VISITOR ACTIVITIES*

- » 3 in 5 visitors engaged in food/beverage/culinary activities during their trip to Maine
- » Nearly **half** of visitors engaged in touring/sightseeing and active outdoor activities during their trip to Maine



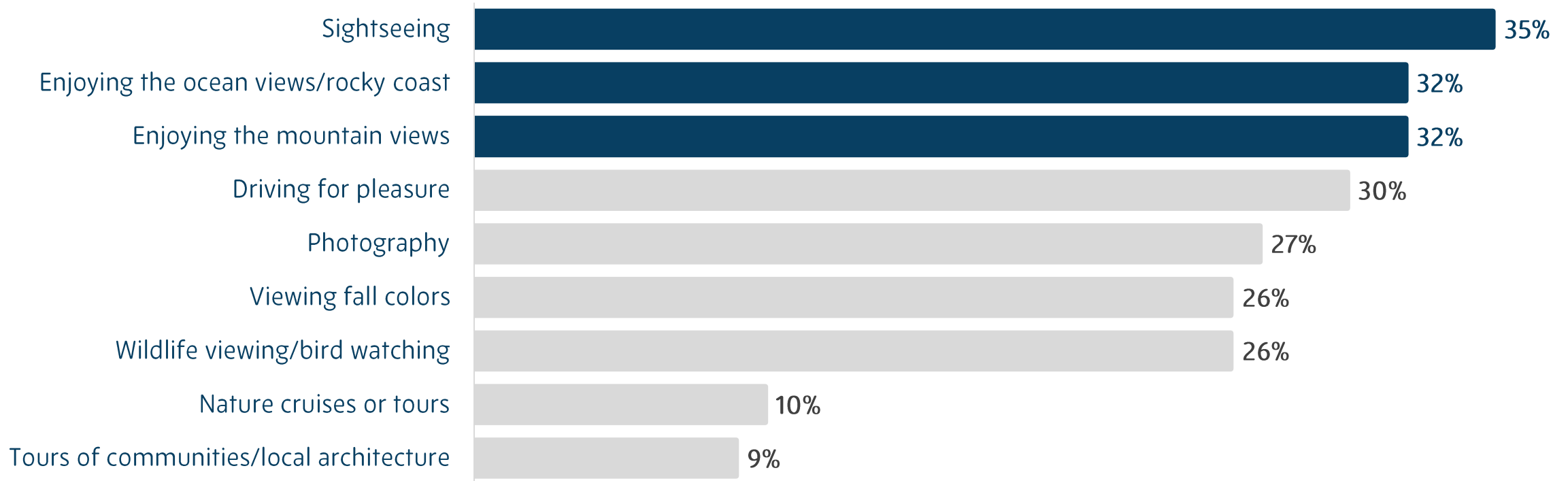
*Multiple responses permitted.

FOOD & BEVERAGE ACTIVITIES*

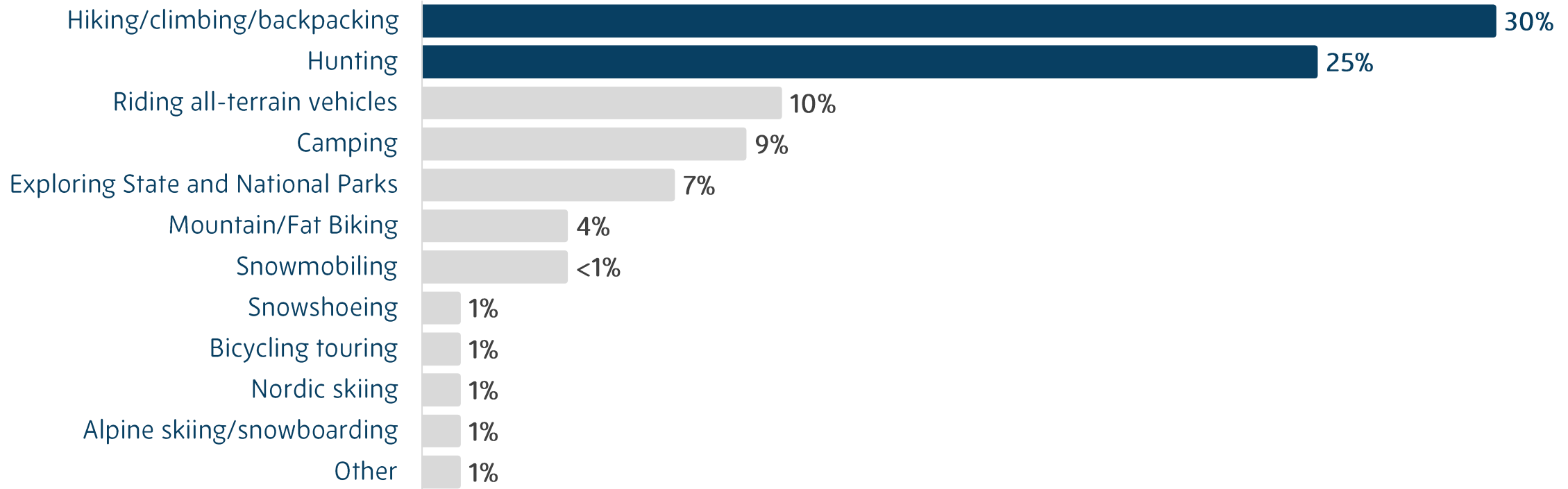


*Multiple responses permitted.

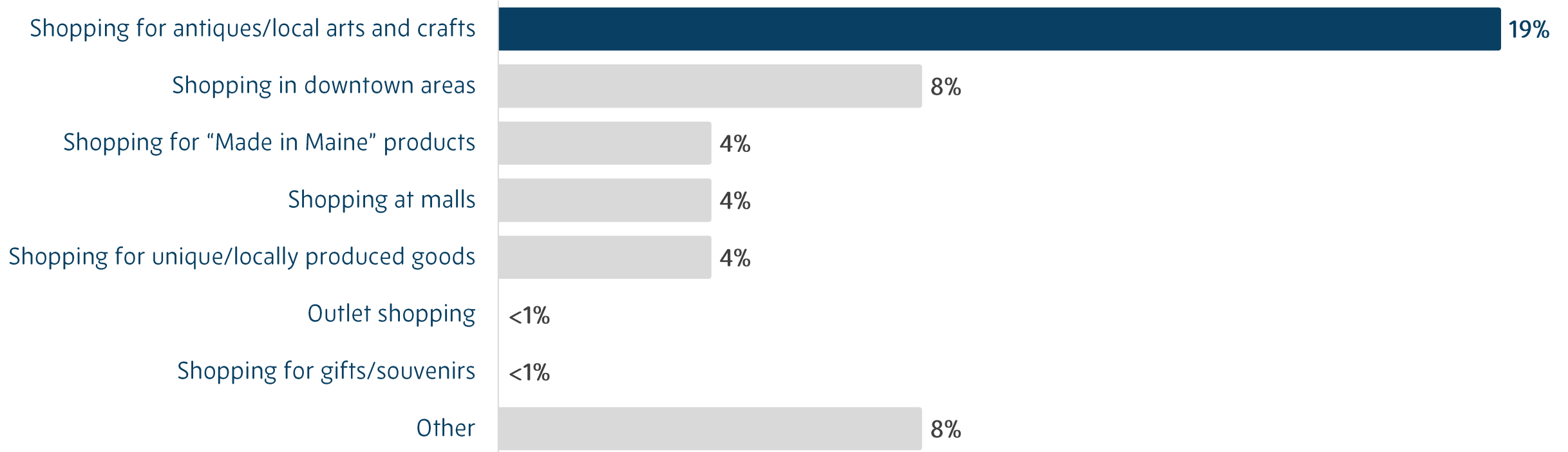
TOURING & SIGHTSEEING ACTIVITIES*



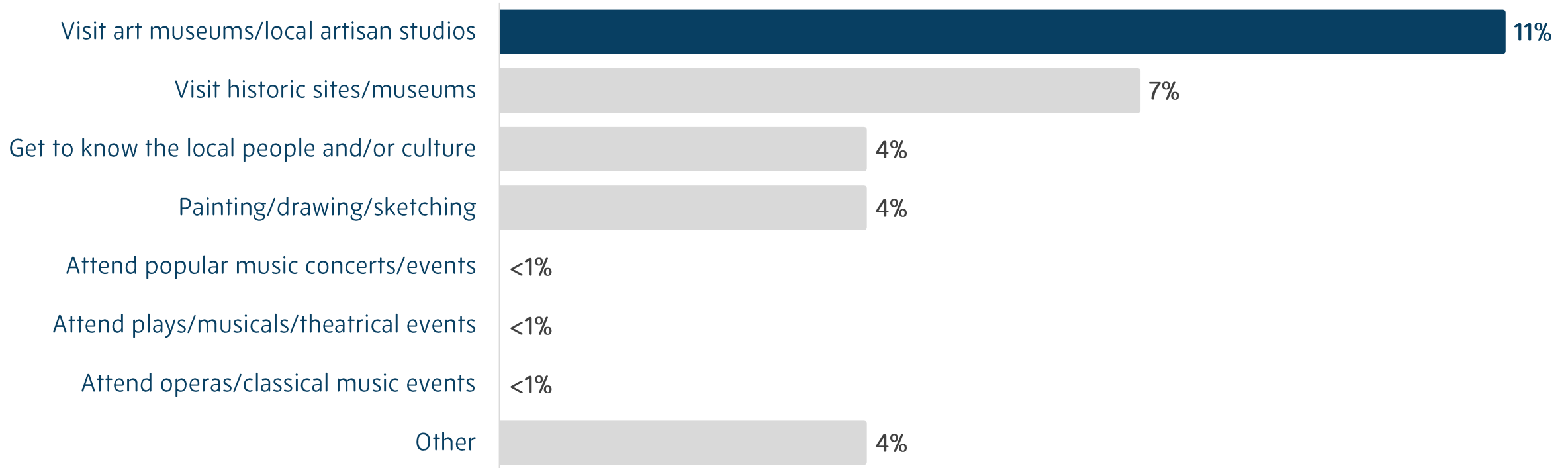
ACTIVE OUTDOOR ACTIVITIES*



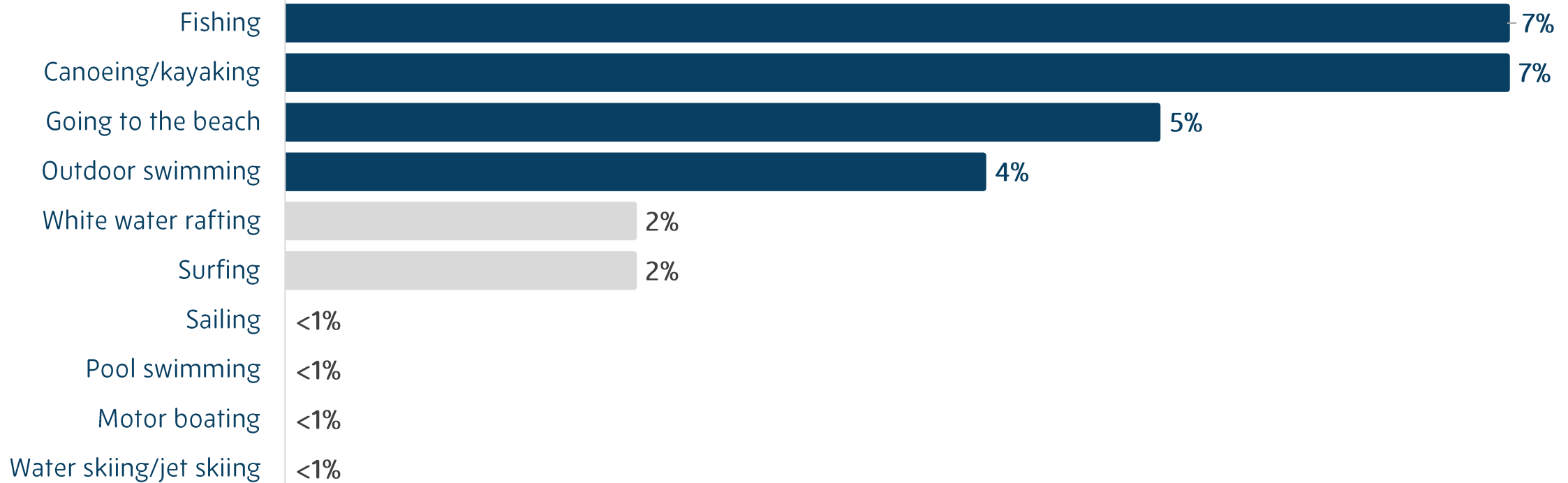
SHOPPING ACTIVITIES*



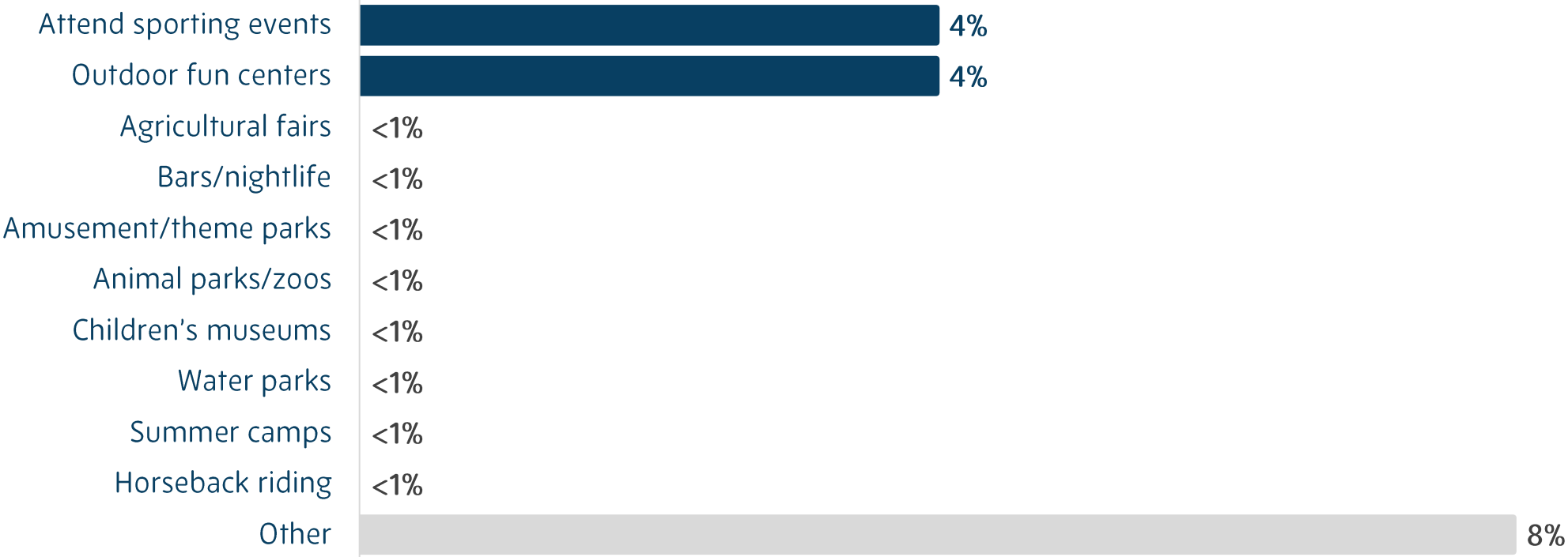
HISTORICAL & CULTURAL ACTIVITIES*



WATER ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



*Multiple responses permitted.

**Other includes visiting the Botanical Gardens and special events.

DAILY TRAVEL PARTY SPENDING

All Visitors

Accommodations	\$155
Transportation	\$50
Groceries	\$30
Restaurants	\$94
Shopping	\$64
Activities & Attractions	\$48
Other	\$26
Daily Spending	\$467

TOTAL TRAVEL PARTY SPENDING

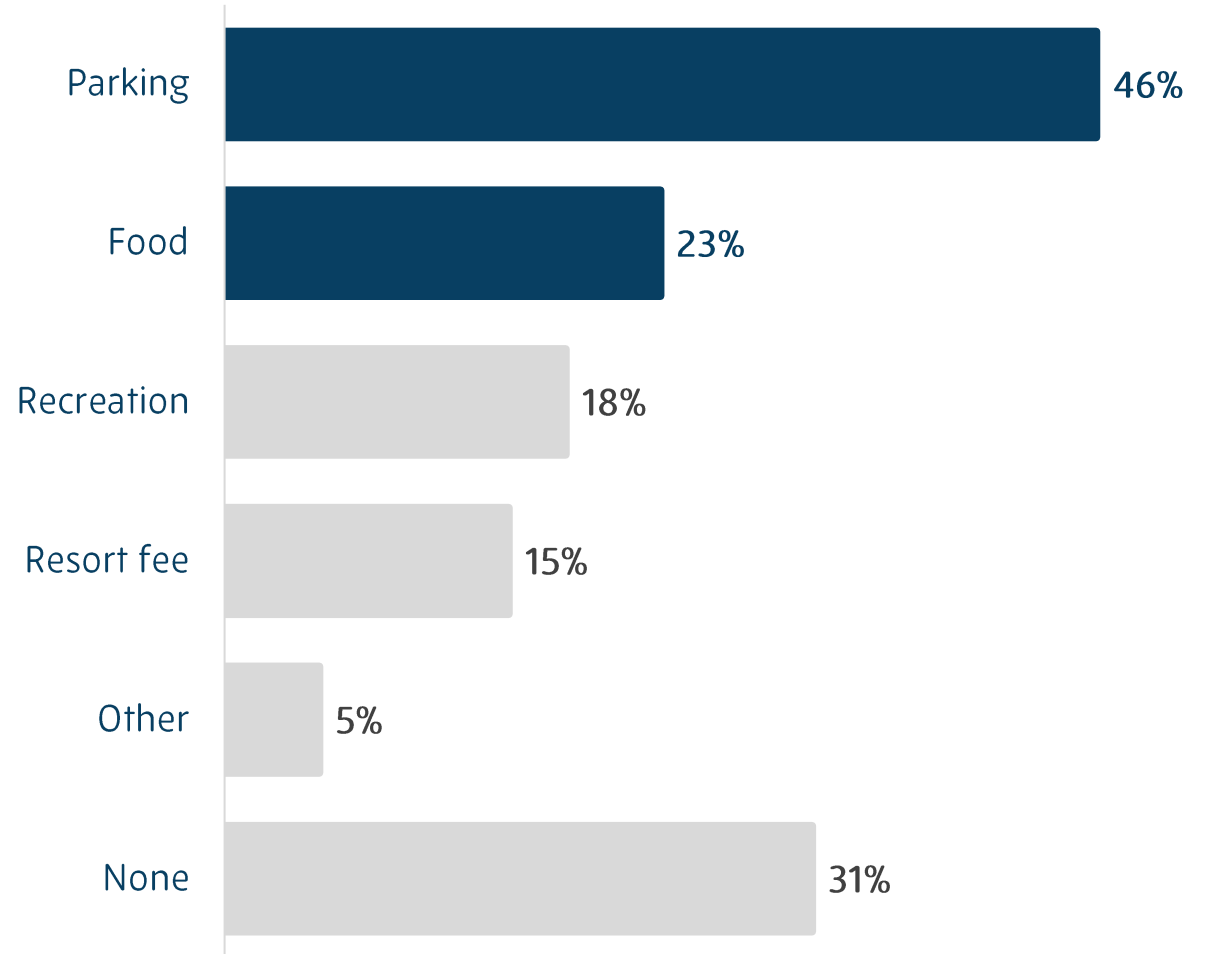
All Visitors

Accommodations	\$1,108
Transportation	\$380
Groceries	\$228
Restaurants	\$714
Shopping	\$486
Activities & Attractions	\$365
Other	\$198

Total Spending	\$3,479
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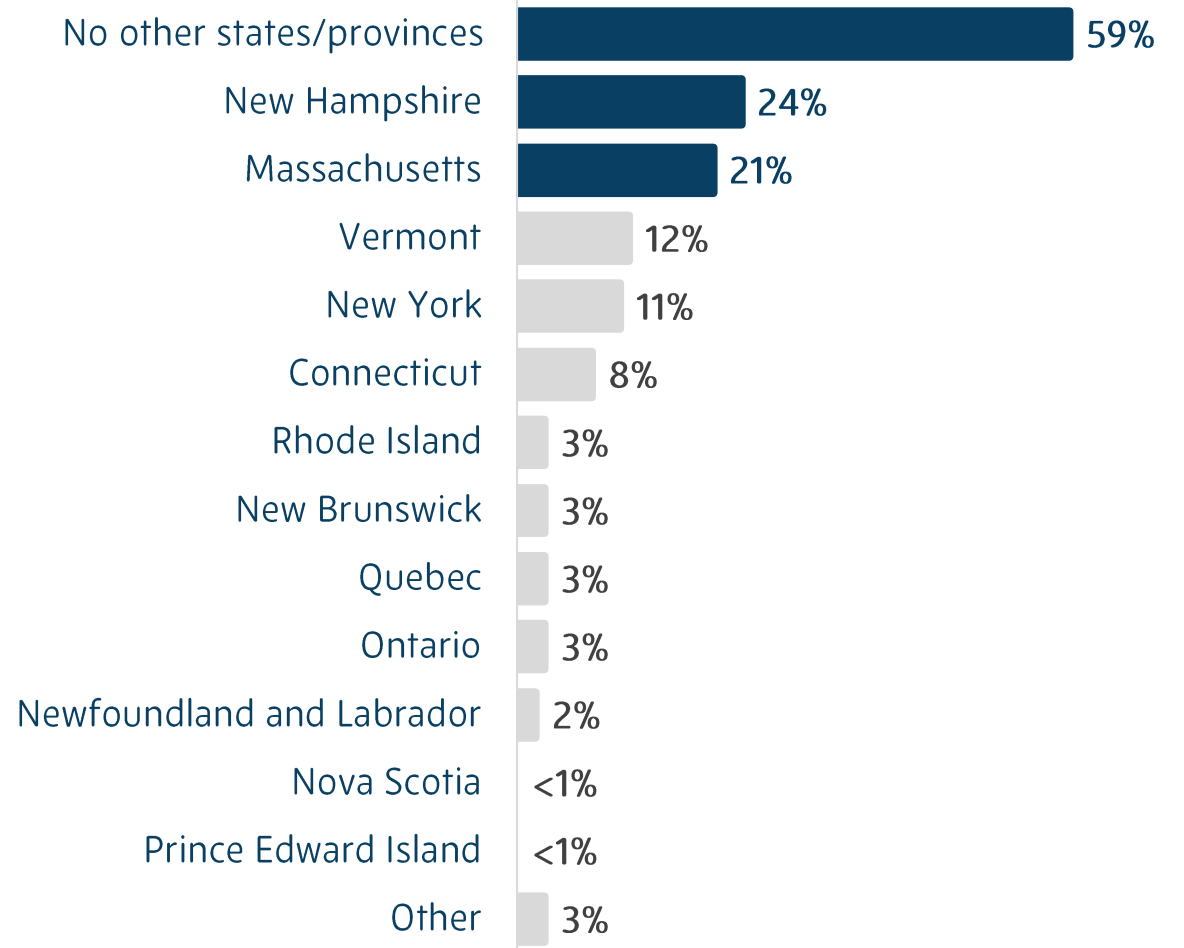
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for nearly **7 in 10** visitors
- » Price for accommodations included parking for nearly **half** of visitors
- » Food was included in accommodations' pricing for nearly **1 in 4** visitors



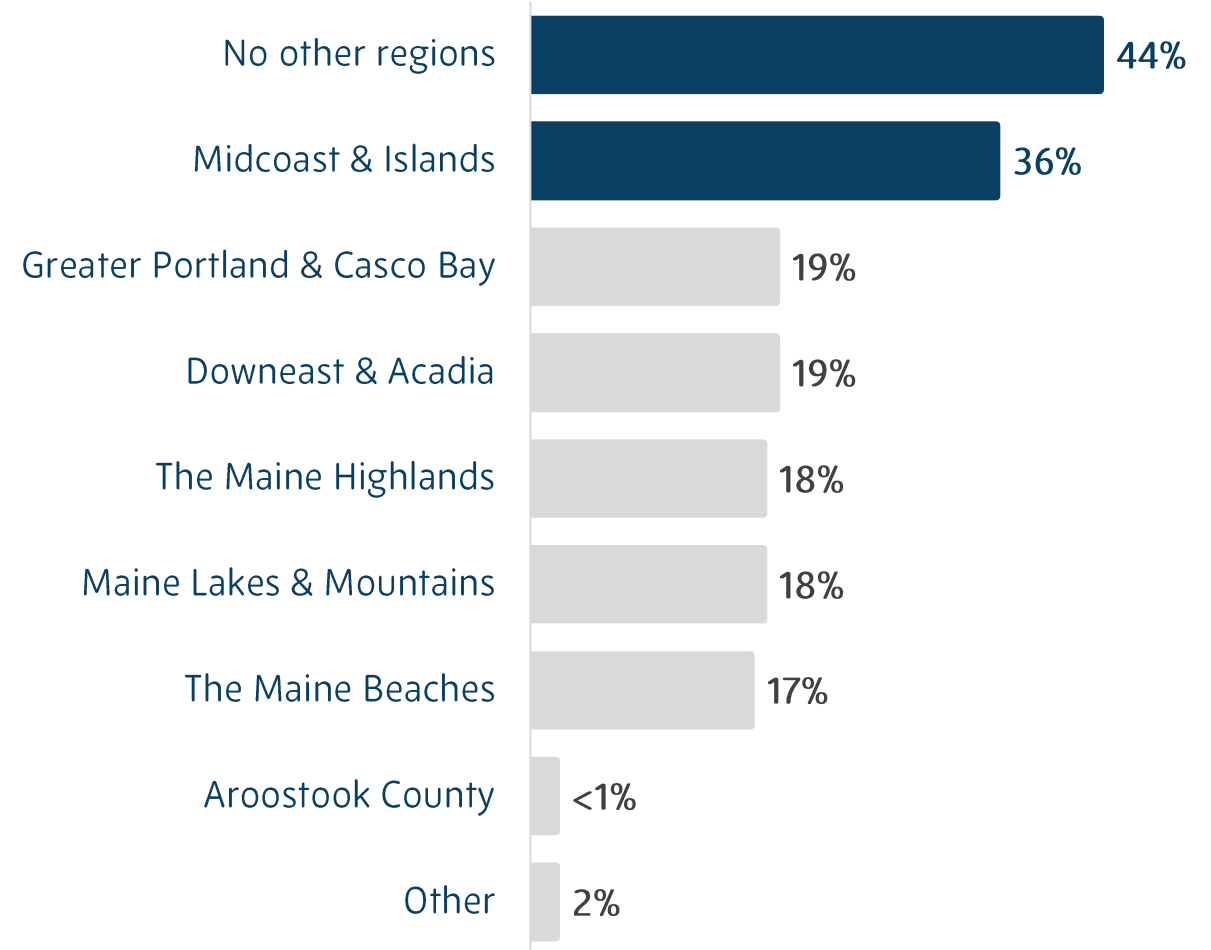
OTHER STATES & PROVINCES VISITED*

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

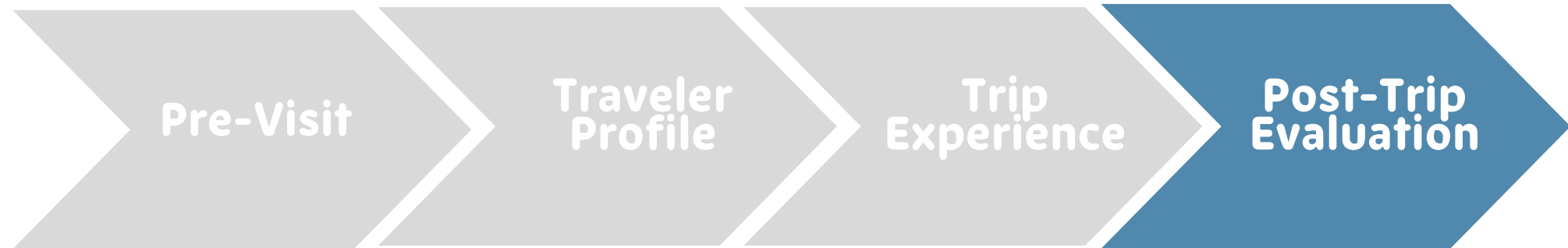


TRAVELING WITHIN MAINE*

- » Over **2 in 5** visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state
- » Nearly **2 in 5** visitors visited the Midcoast & Islands area in addition to their primary destination within Maine



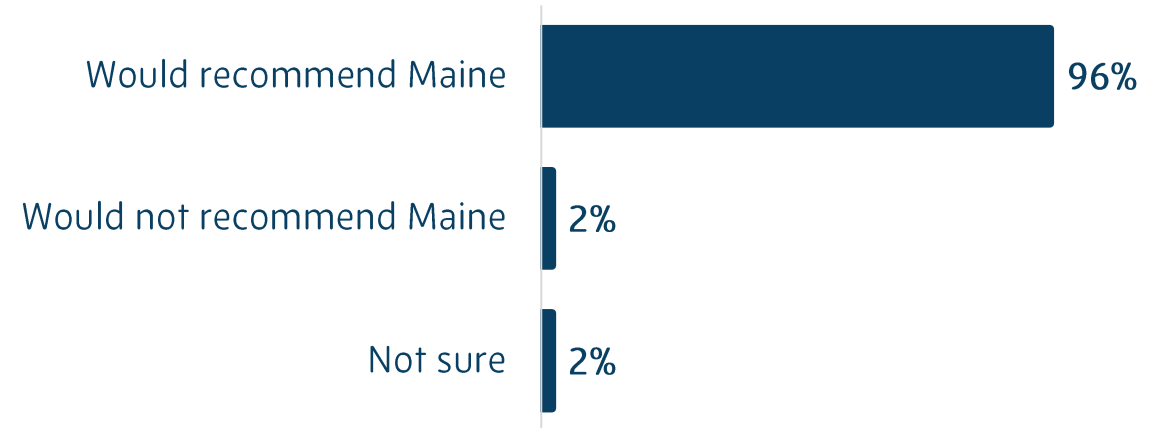
VISITOR JOURNEY: POST-TRIP EVALUATION



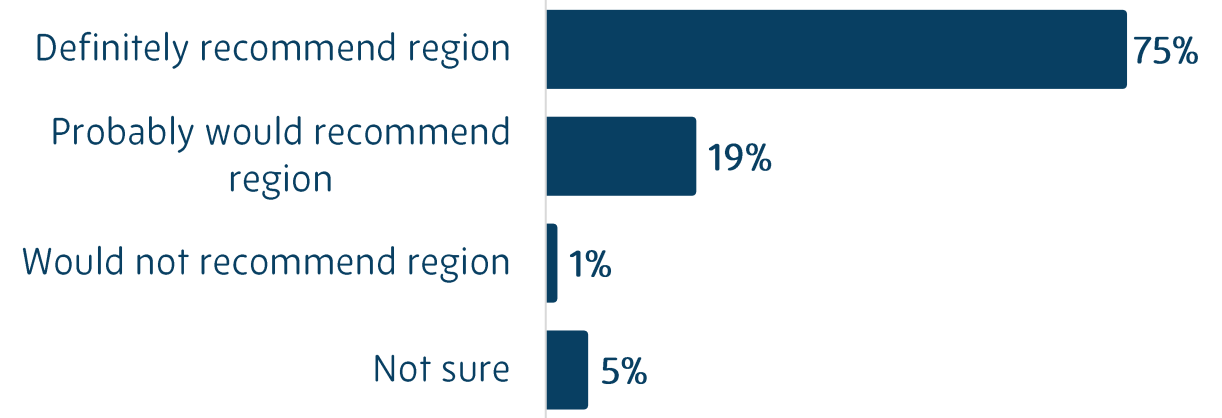
RECOMMENDING MAINE & ITS REGIONS

- » **96%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » **94%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **75%** would definitely recommend

Likelihood of Recommending Maine

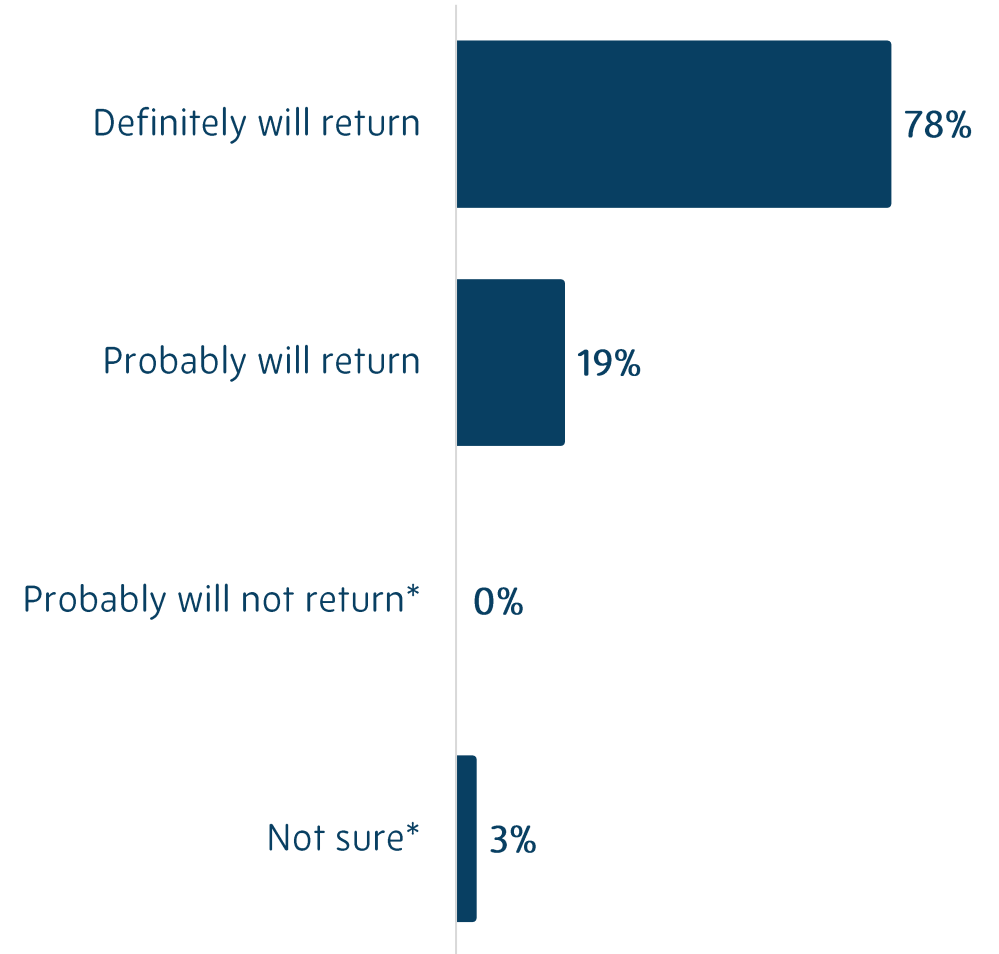


Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

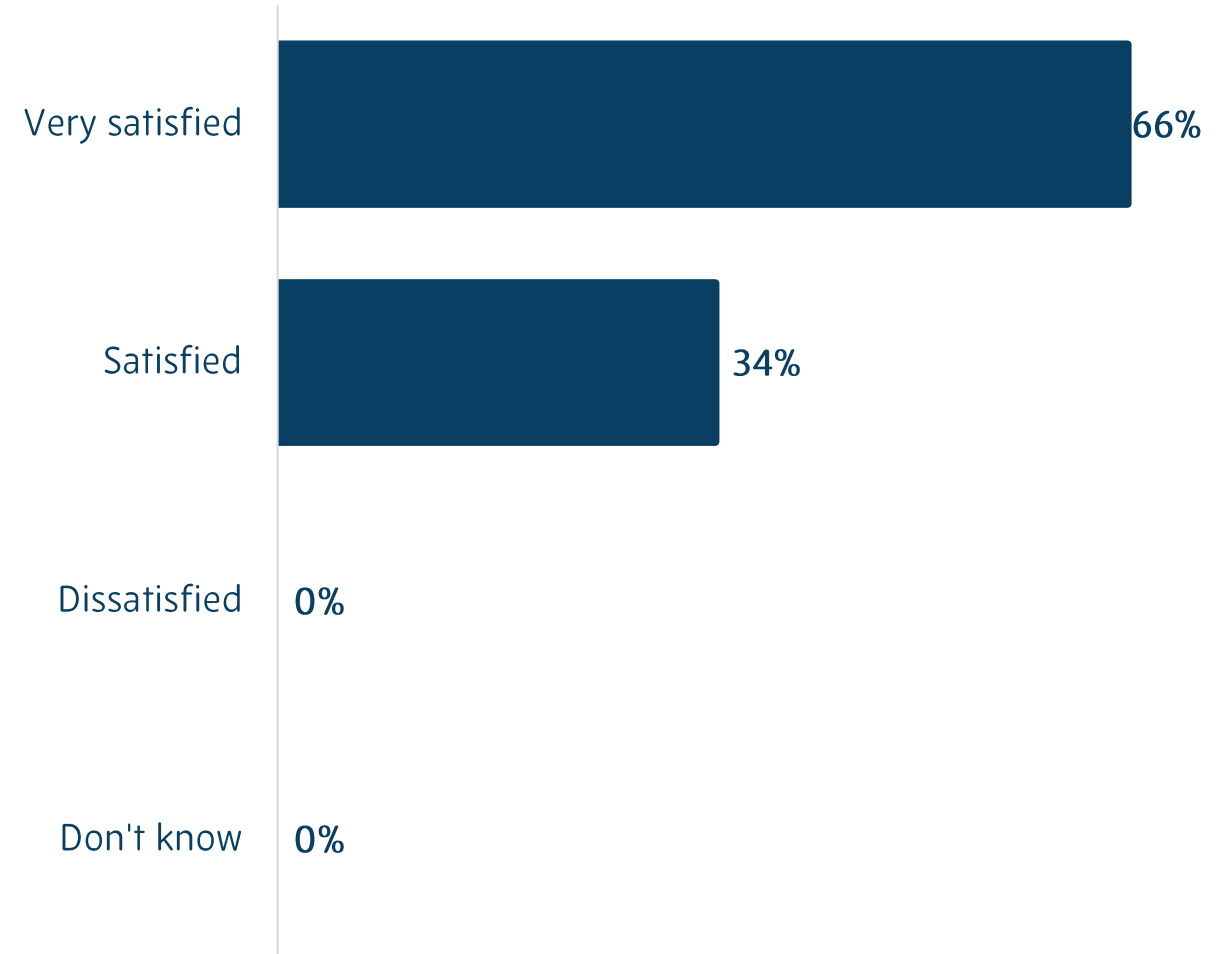
» **97%** of visitors will return to Maine for a future visit or vacation



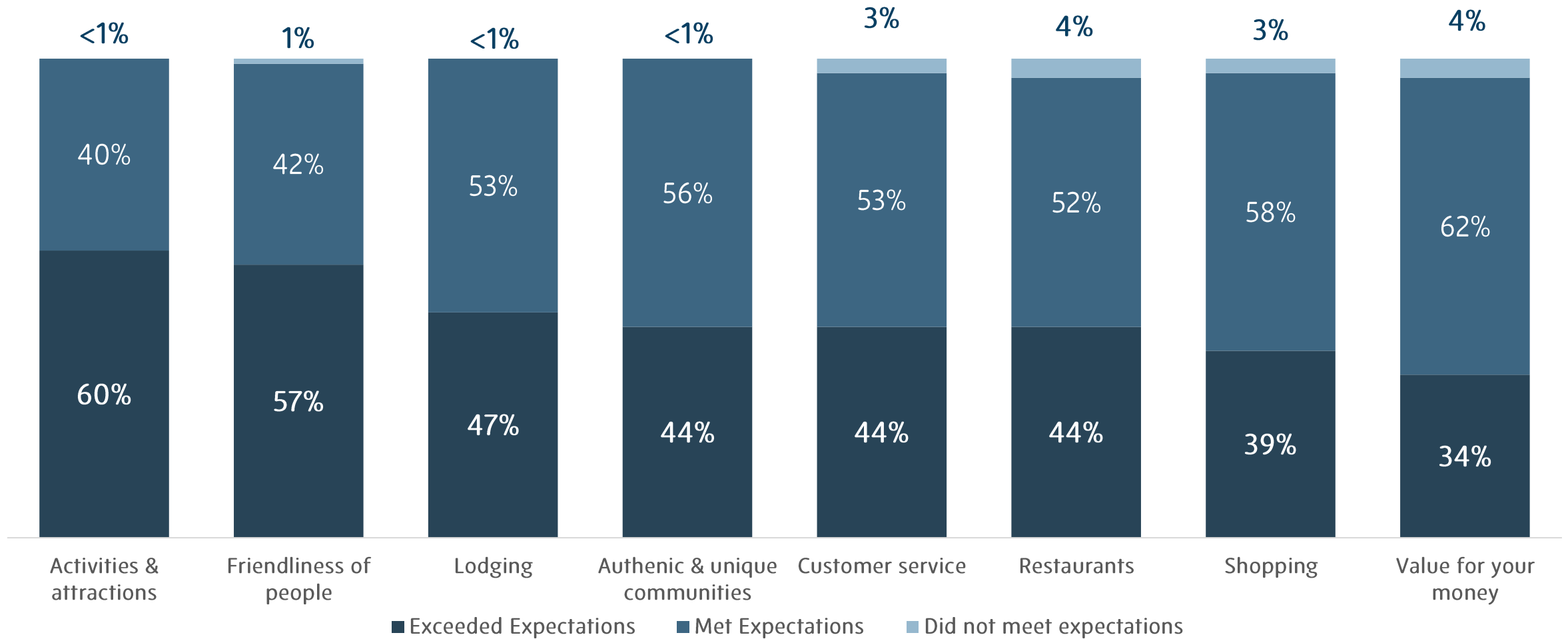
*3% of all visitors are not sure if they will return to Maine for the following reasons:
1. Prefer a variety of destinations.

SATISFACTION

- » 100% of visitors were satisfied with their trip to Maine
- » 2 in 3 visitors were very satisfied with their trip to Maine

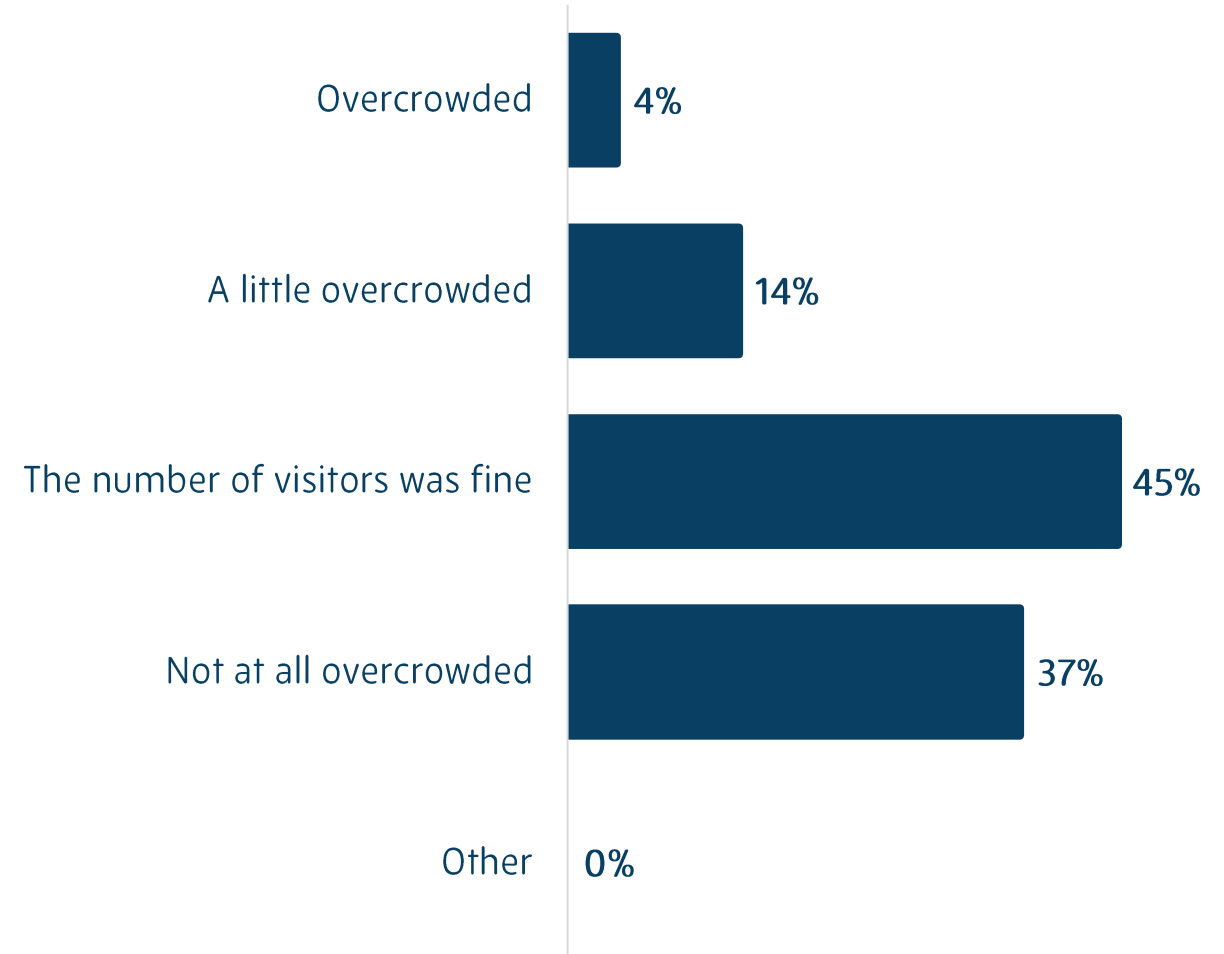


TRIP RATINGS



OVERCROWDING

- » 45% of visitors thought the number of visitors during their trip to Maine was fine
- » 14% of visitors thought it was a little overcrowded



STUDY METHODS



METHODOLOGY



Visitor Tracking

178 interviews were completed with visitors to the Kennebec Valley online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between September 1st, 2023 and November 30th, 2023.

KENNEBEC VALLEY

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Downs & St. Germain Research
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