

MAINE HIGHLANDS

2023 Fall Visitor Tracking Report

SEPTEMBER – NOVEMBER 2023

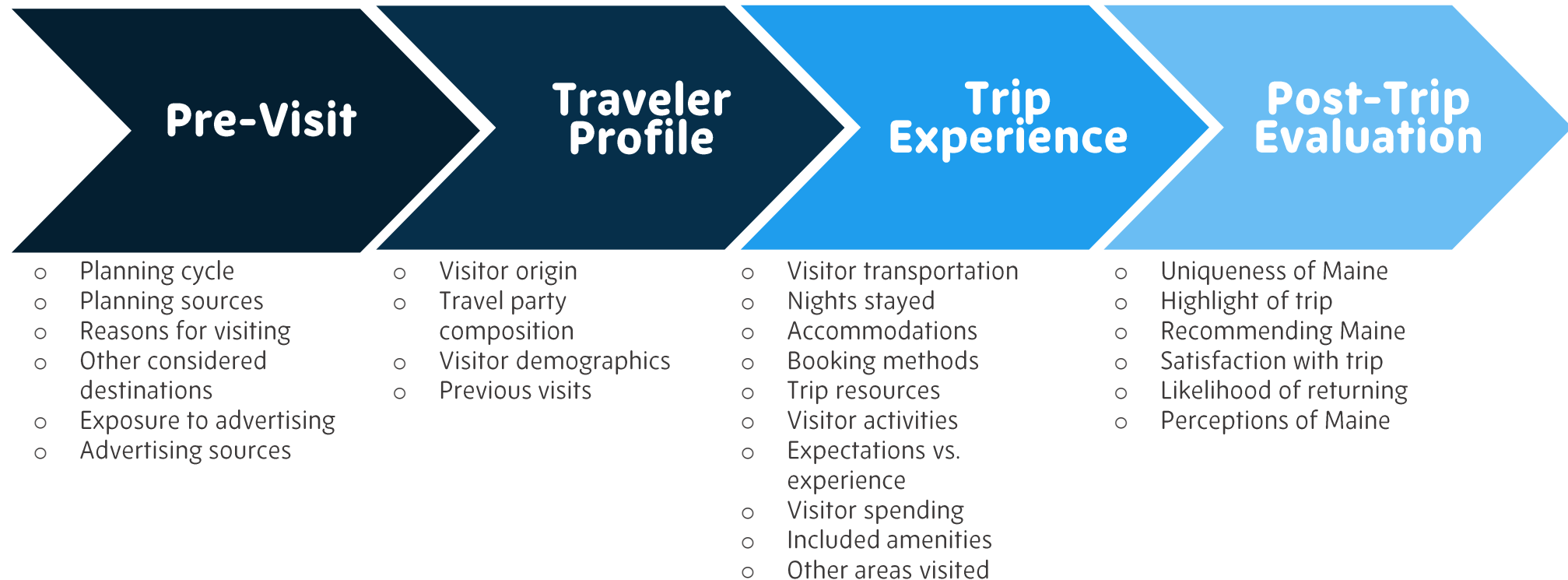


STUDY OBJECTIVES: VISITOR JOURNEY

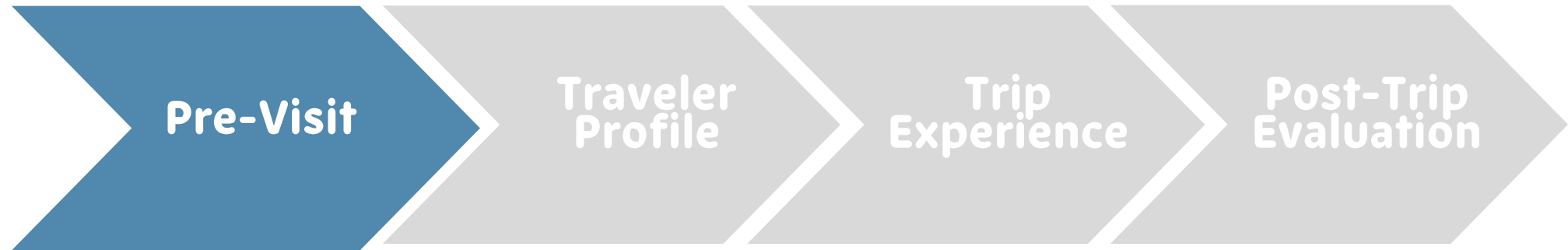
This report presents information about visitors to Maine from September to November 2023.

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

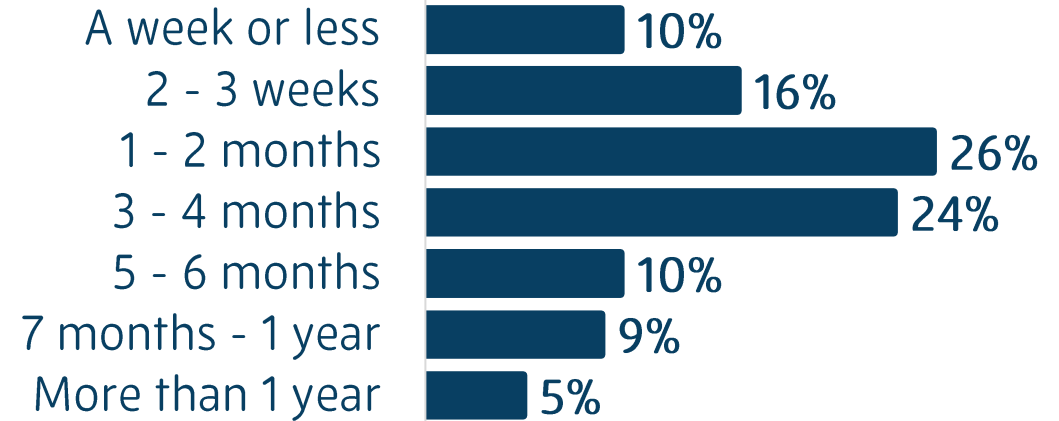
» Typical visitors began planning their trip **51 days** in advance

» **74%** of visitors started planning their trip a month or more in advance of their trip

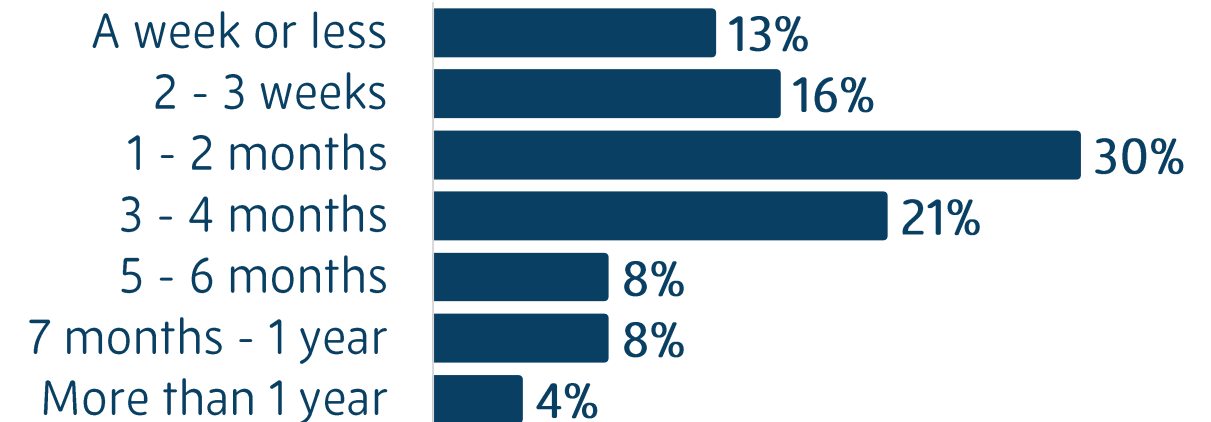
» Typical visitors booked their accommodations **51 days** in advance

» **59%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

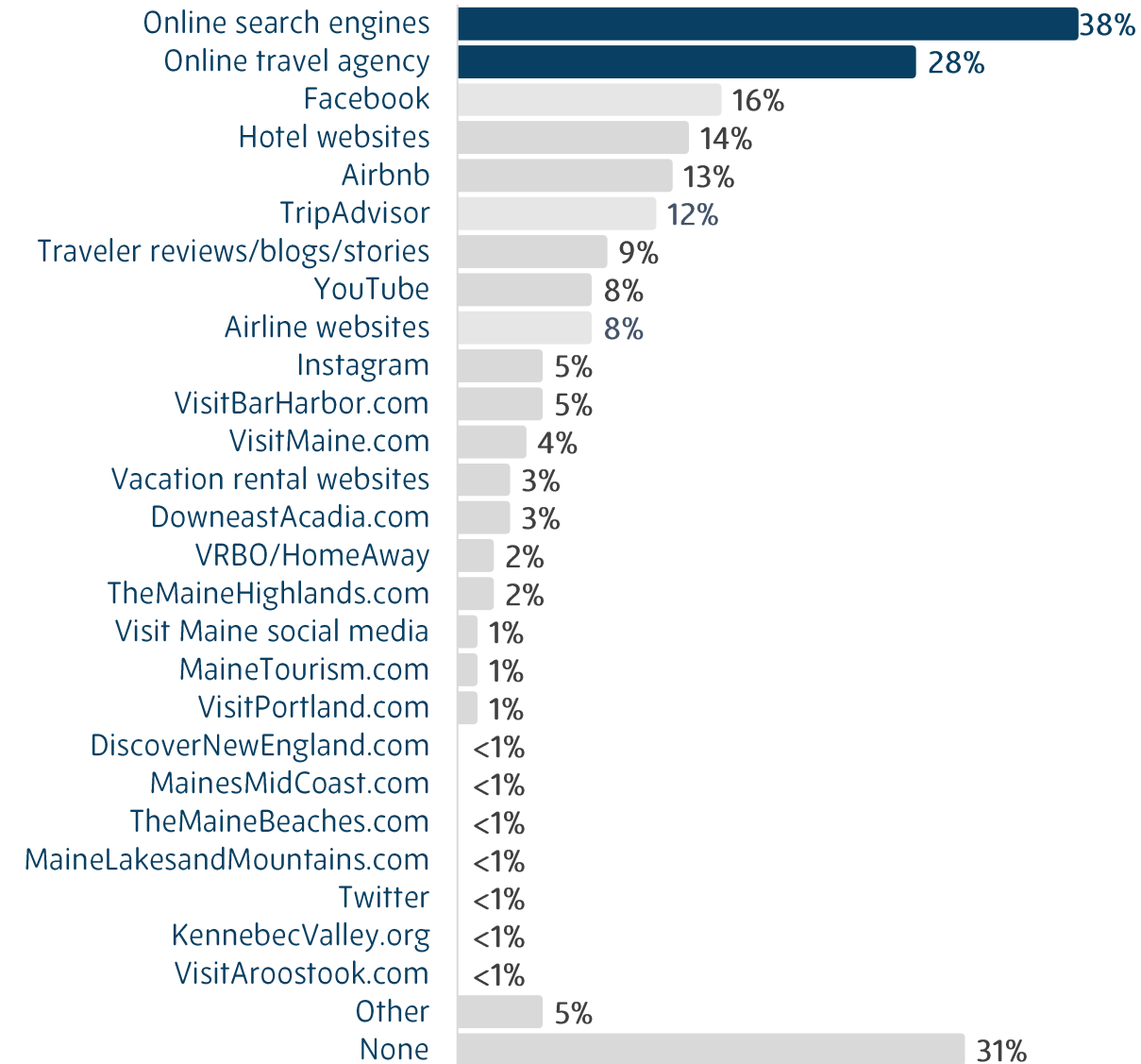


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

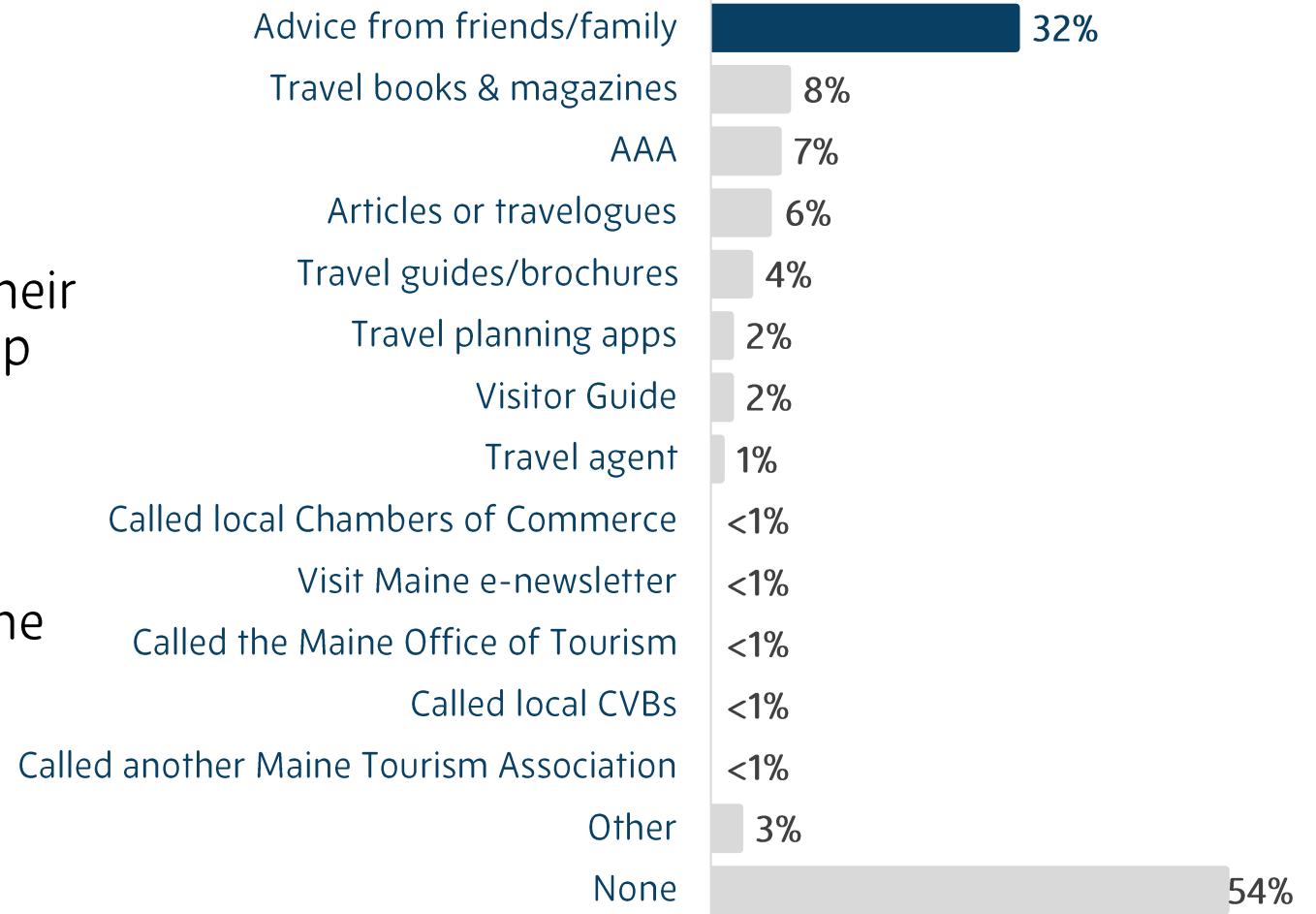
- » Nearly **7 in 10** visitors used one or more online resources to help them plan their trip in Maine
- » Nearly **2 in 5** visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » About **3 in 10** visitors used an online travel agency to help them plan their trip in Maine



*Multiple responses permitted.

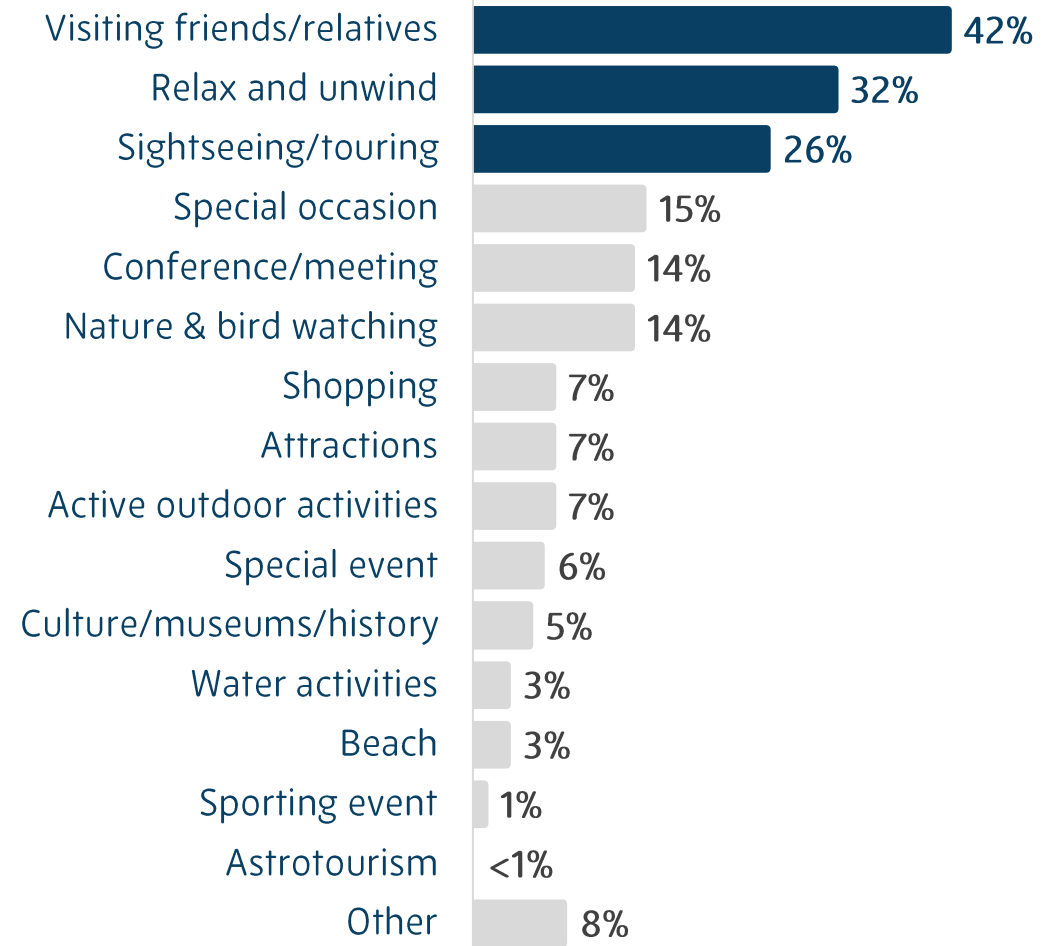
OTHER TRIP PLANNING SOURCES*

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



REASONS FOR VISITING*

- » Over **2 in 5** visitors came to Maine to relax and unwind and visit friends/relatives
- » Nearly **1 in 3** visitors came to Maine to relax and unwind
- » Over **1 in 4** visitors came to Maine for sightseeing and touring



TV SHOWS & FILM*

- » 3% 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 it made them think about Maine as a place to visit or it was the deciding factor for visiting Maine
- » 4% 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: 3% of visitors who were inspired by a TV show or film

I was considering Maine as a destination option and visiting a location related to a TV show or film was the deciding factor 43%

Seeing Maine in a film or TV show made me think about Maine as a place to visit 43%

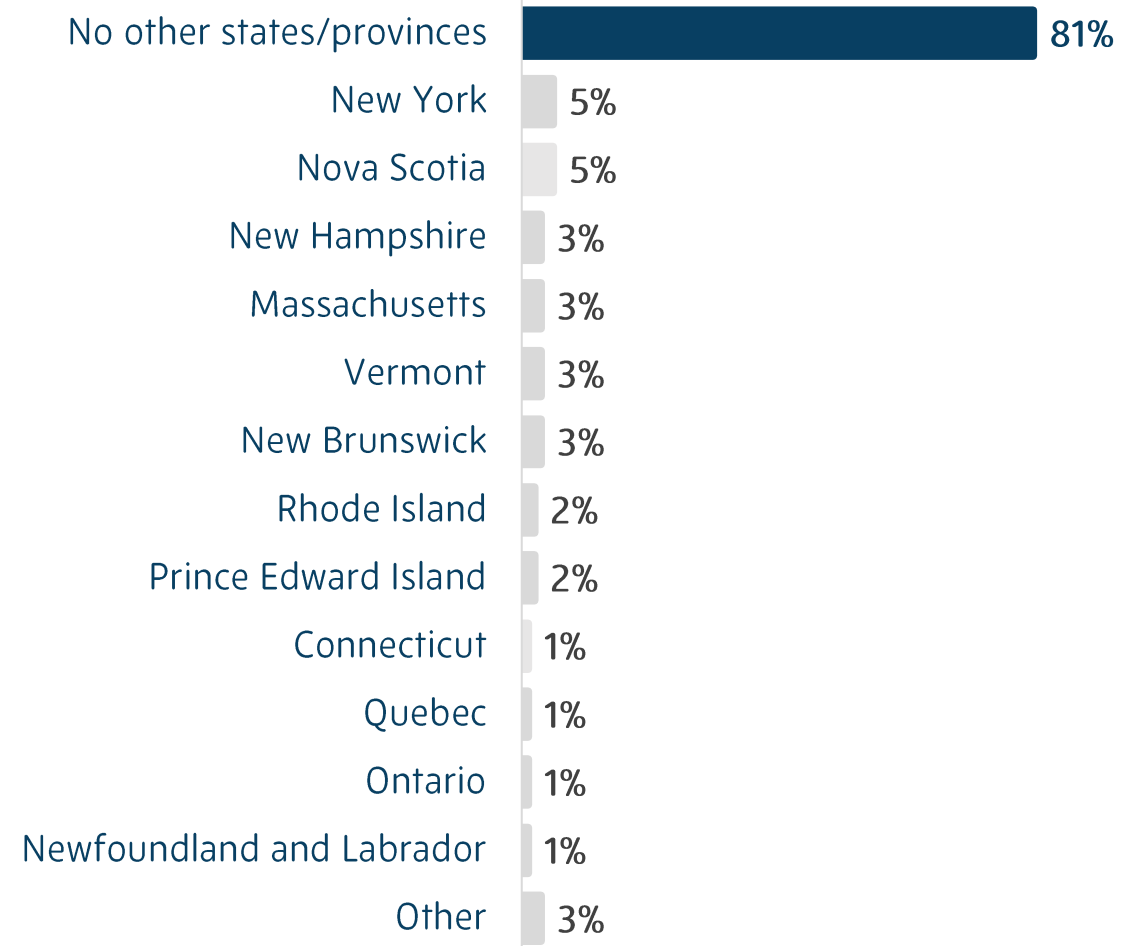
Visiting a location related to a TV show or film was the main reason I visited Maine 14%

Visiting a location of a TV show or film was one of the activities I engaged in while in Maine <1%

*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

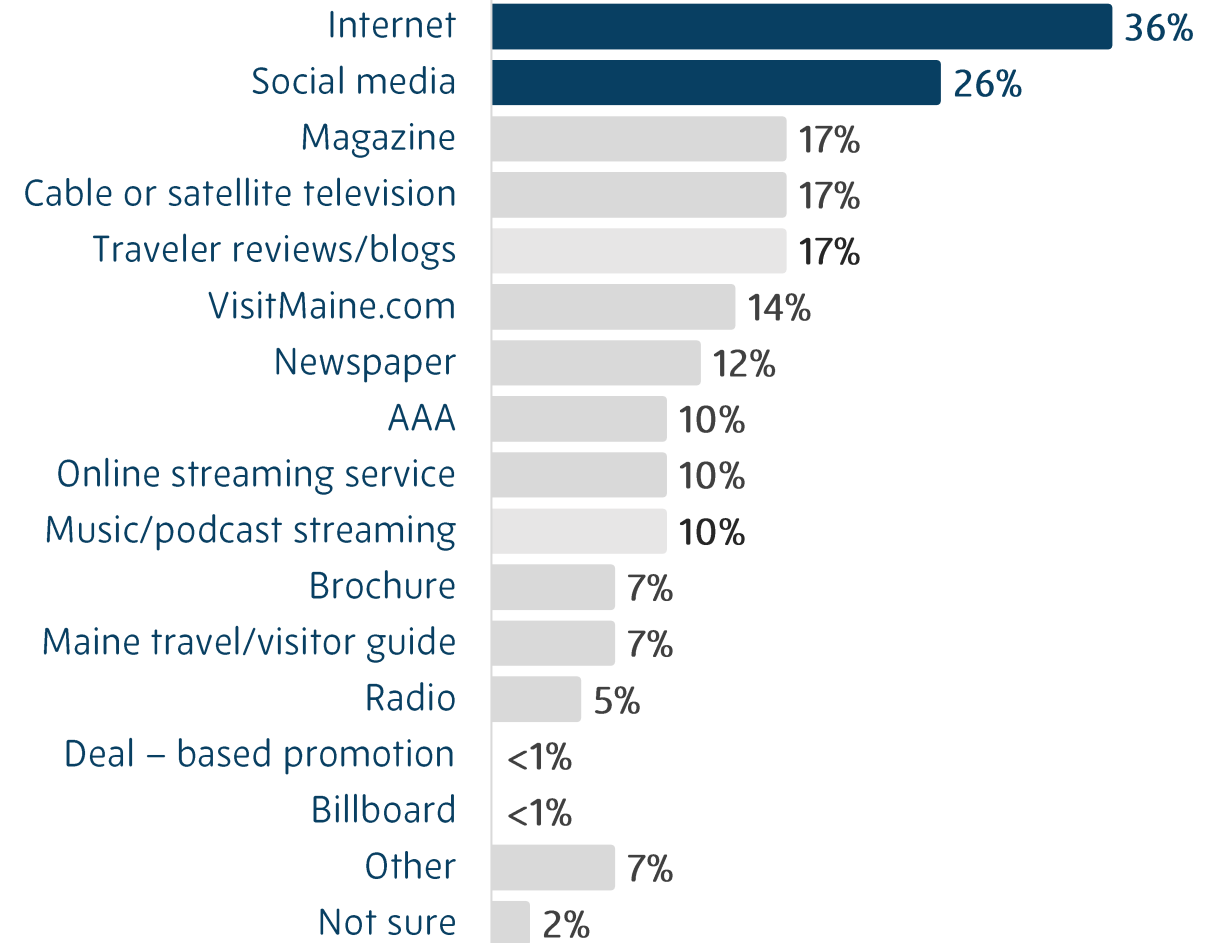
» Over 4 in 5 visitors considered visiting **ONLY** Maine while planning their trips



PRE-TRIP RECALL OF ADVERTISING*

- » Over **1 in 5** visitors noticed advertising or promotions for Maine prior to their trip
- » Visitors who recalled this advertising primarily saw it on the internet or social media
- » This information influenced **11% of all** visitors to visit Maine

Base: 21% of visitors who noticed advertising

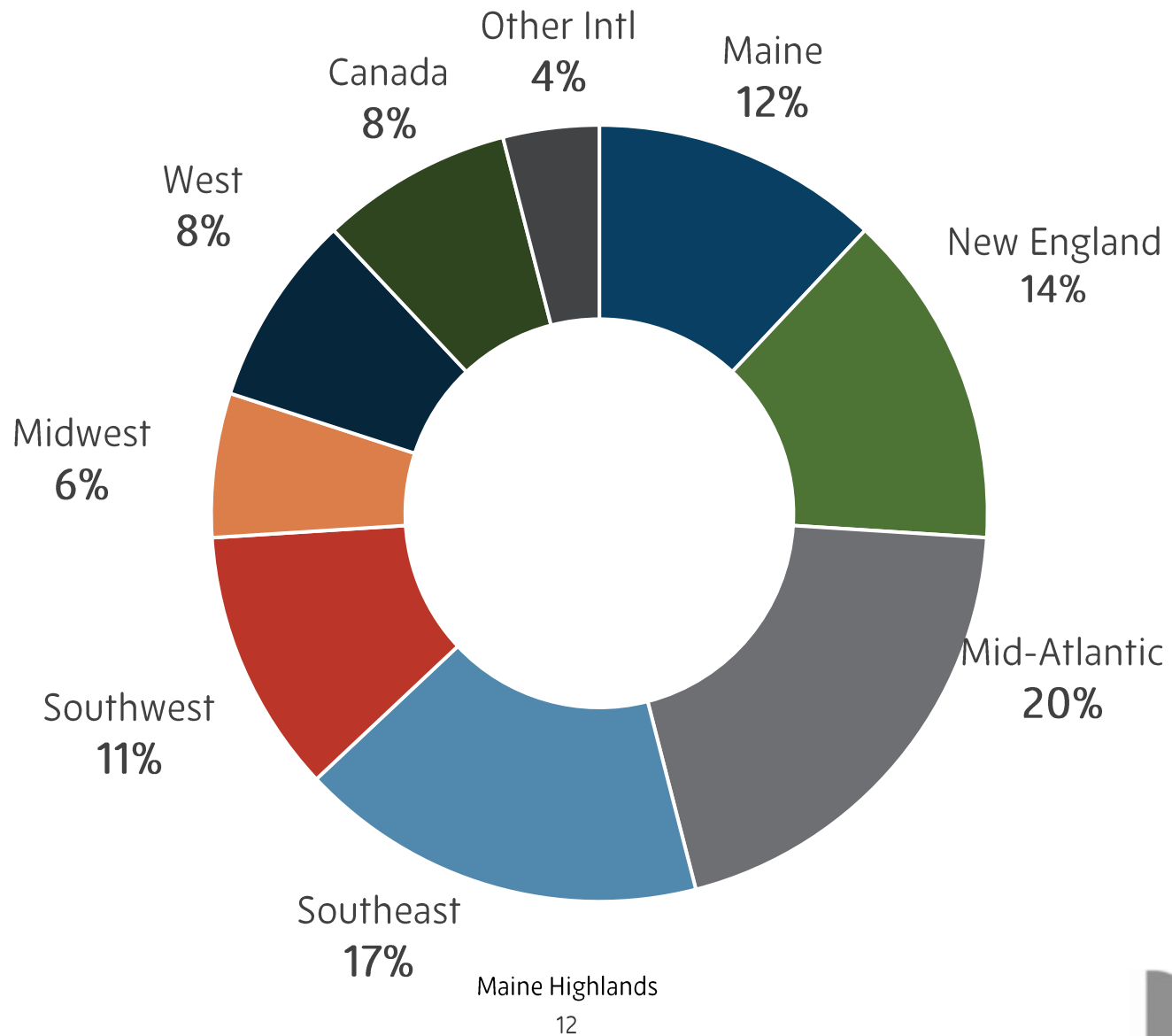


*Multiple responses permitted.

VISITOR JOURNEY: TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **65%** of visitors traveled to/within Maine from 11 U.S. states and Canadian provinces
- » **12%** of visitors were residents of Maine traveling throughout the state

| State | Percent |
|---------------|---------|
| Maine | 12% |
| Florida | 9% |
| Texas | 9% |
| Massachusetts | 7% |
| Virginia | 6% |
| New Brunswick | 5% |
| New York | 4% |
| New Jersey | 4% |
| Connecticut | 3% |
| Pennsylvania | 3% |
| California | 3% |

TOP ORIGIN MARKETS

- » Over **1 in 3** visitors traveled from **12** U.S. markets
- » **11%** of visitors traveled to Maine from Washington DC-Baltimore and New York City

| Market | Percent |
|----------------------------------------|---------|
| New York City ¹ | 6% |
| Washington DC - Baltimore ² | 5% |
| Philadelphia | 3% |
| Dallas - Ft. Worth | 3% |
| El Paso, TX | 3% |
| Augusta | 2% |
| Providence, RI | 2% |
| Orlando | 2% |
| Phoenix - Mesa - Glendale, AZ | 2% |
| Columbus, OH | 2% |
| Austin | 2% |
| Saint John, CAN | 2% |

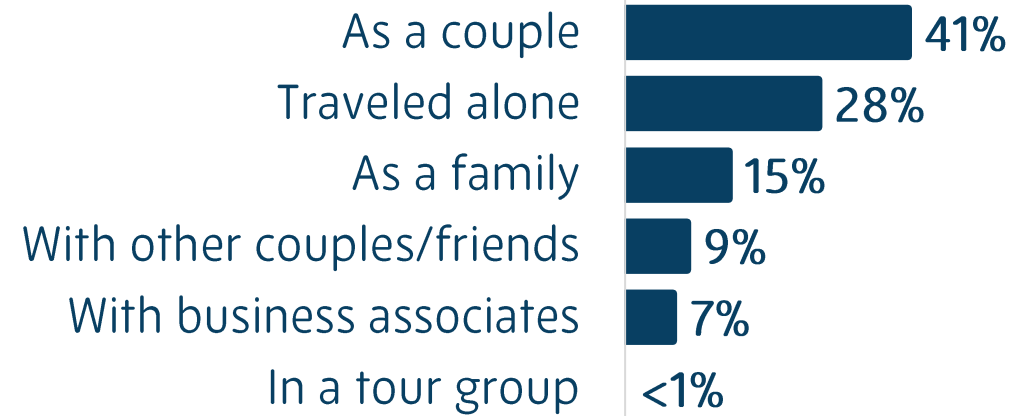
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

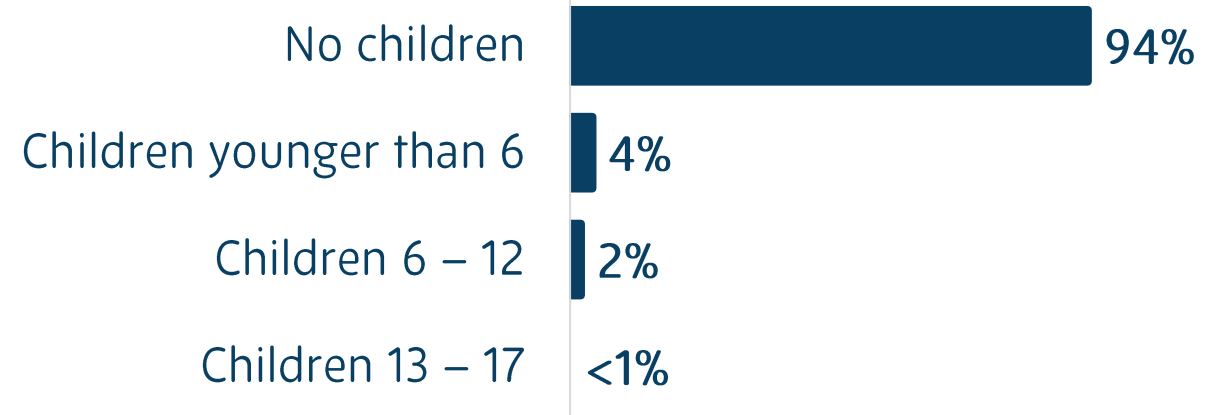
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.9** people
- » Over **2 in 5** visitors traveled as a couple
- » Nearly **3 in 10** traveled alone
- » **6%** of visitors traveled with one or more children in their travel party

Travel Party Composition



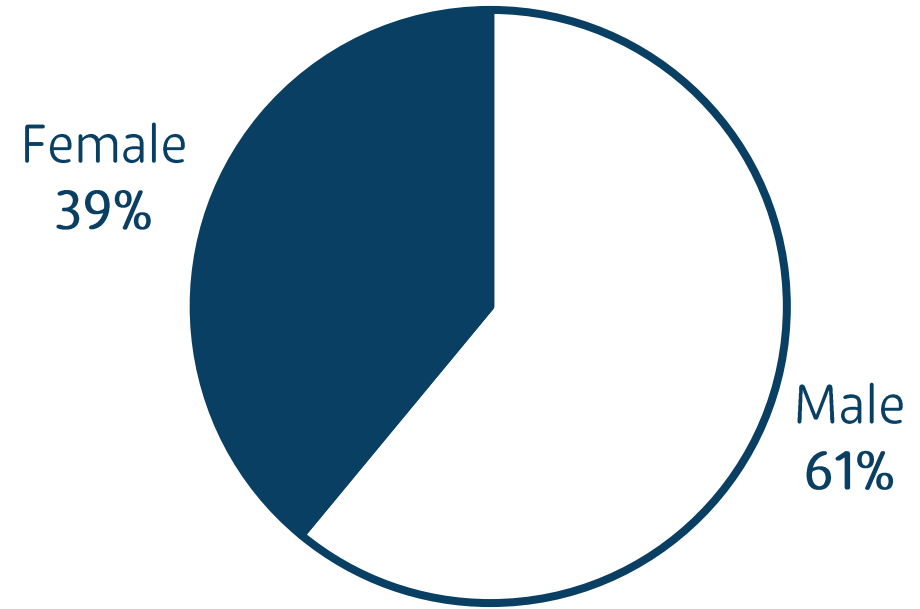
Children in Travel Party*



*Multiple responses permitted.

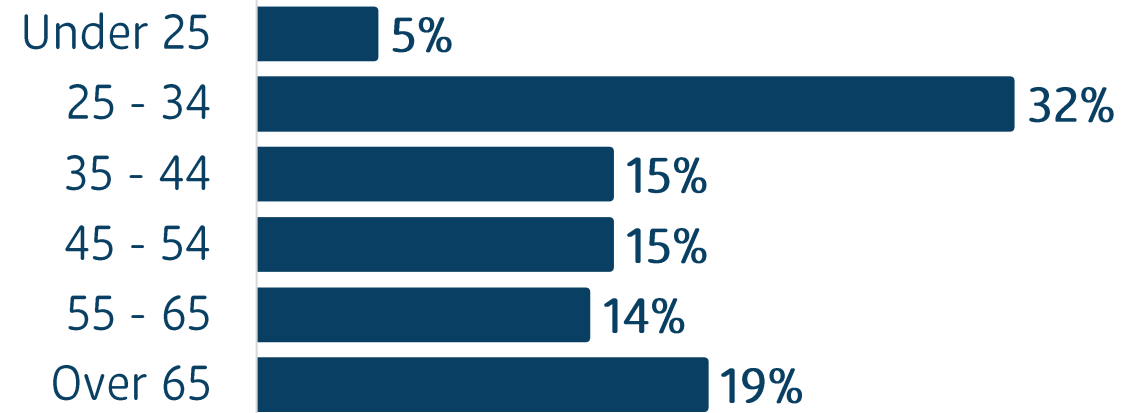
GENDER

» Over 3 in 5 visitors to Maine interviewed were males



AGE

» The average age of visitors to Maine is 44 years old



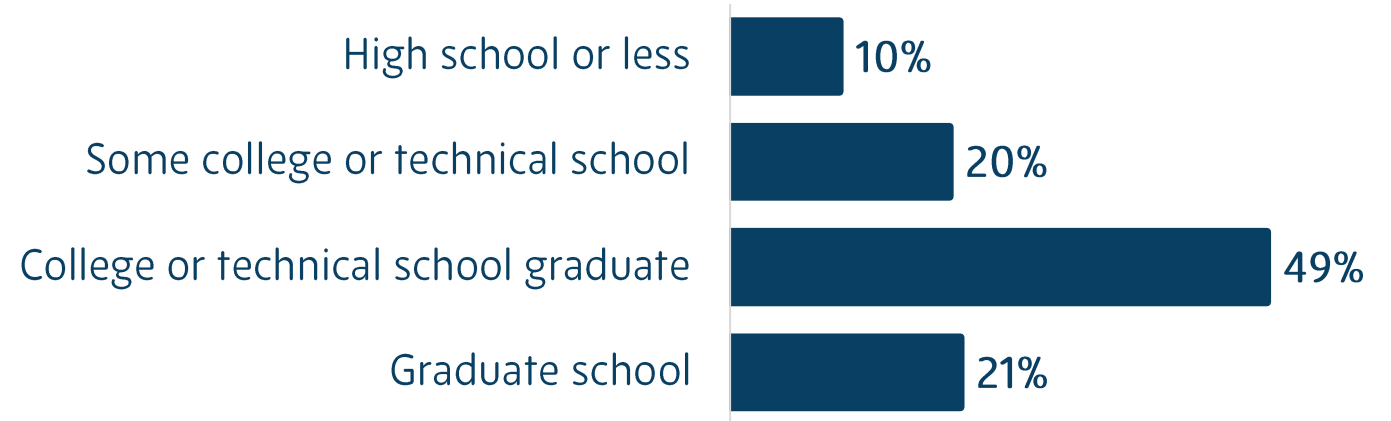
RACE & ETHNICITY

» 9 in 10 visitors to Maine were white



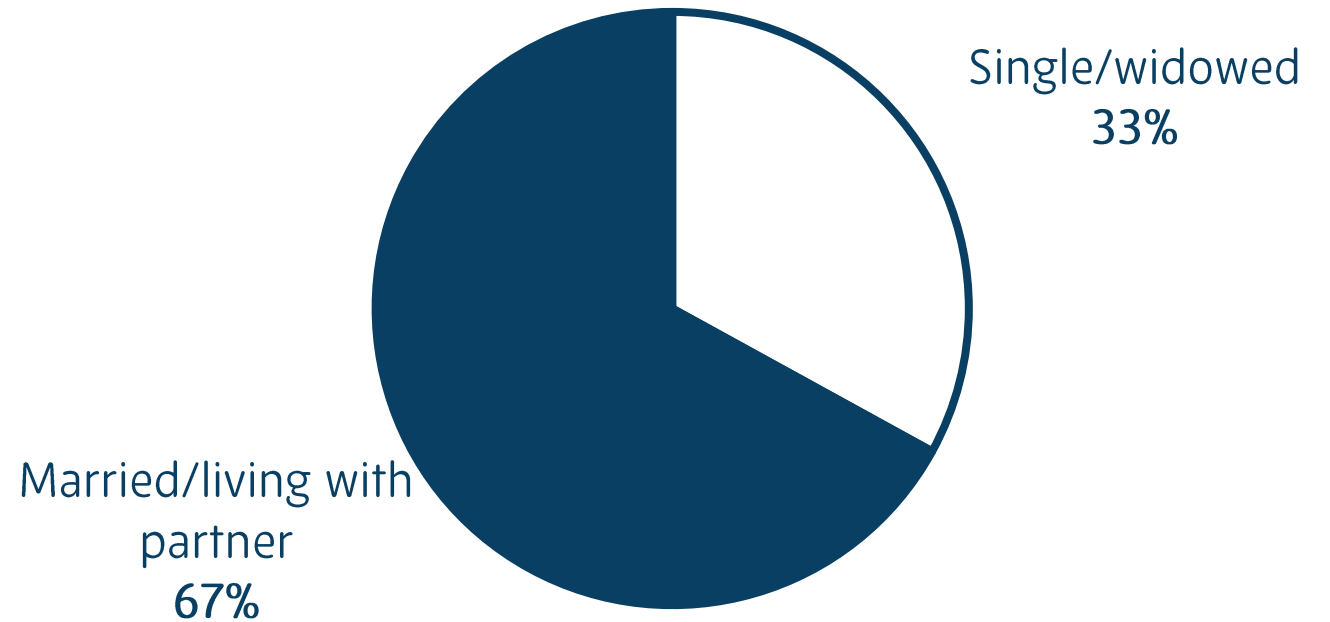
EDUCATIONAL ATTAINMENT

» **7 in 10** visitors have a college/technical school degree or higher



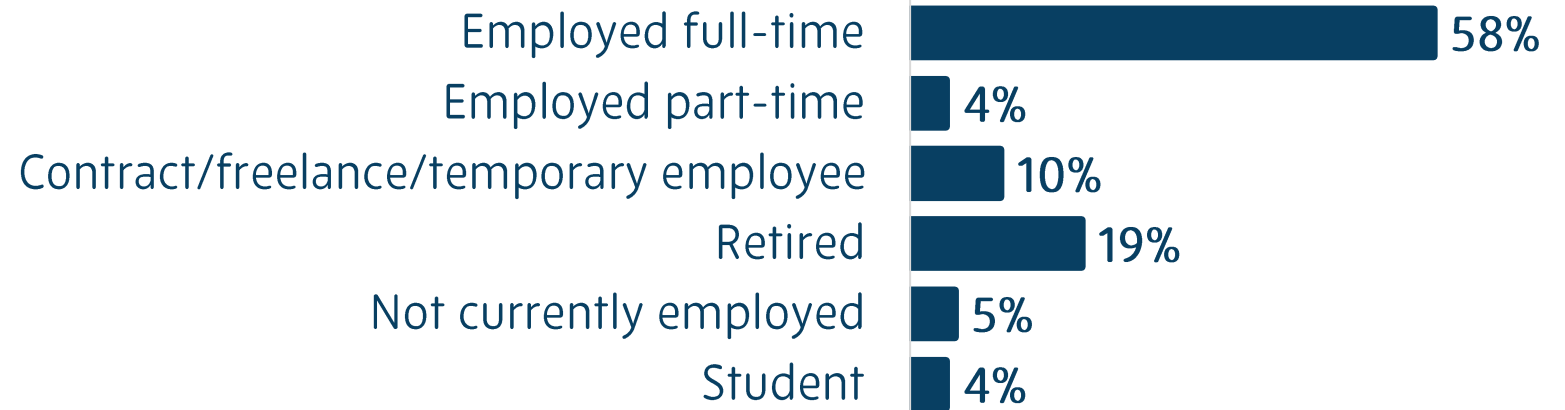
MARITAL STATUS

» Over **2 in 3** visitors to Maine were married or living with their partner



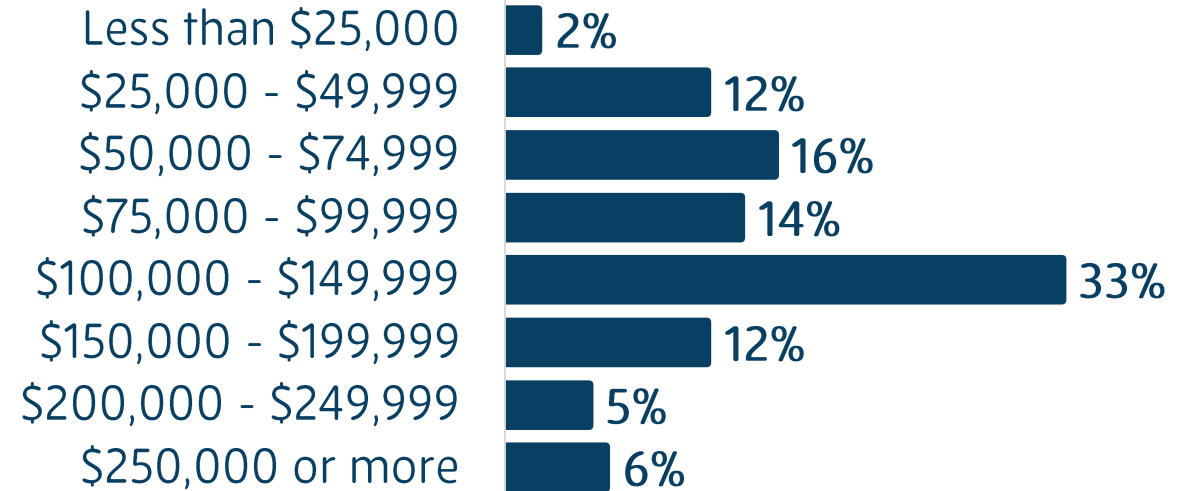
EMPLOYMENT STATUS

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



HOUSEHOLD INCOME

- » The average household income of visitors to Maine is **\$109,100** per year
- » **23%** of visitors to Maine earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » 23% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 39% had previously traveled in Maine more than 10 times

This is my first time



23%

2 - 5 times

24%

6 - 10 times

14%

11+ times

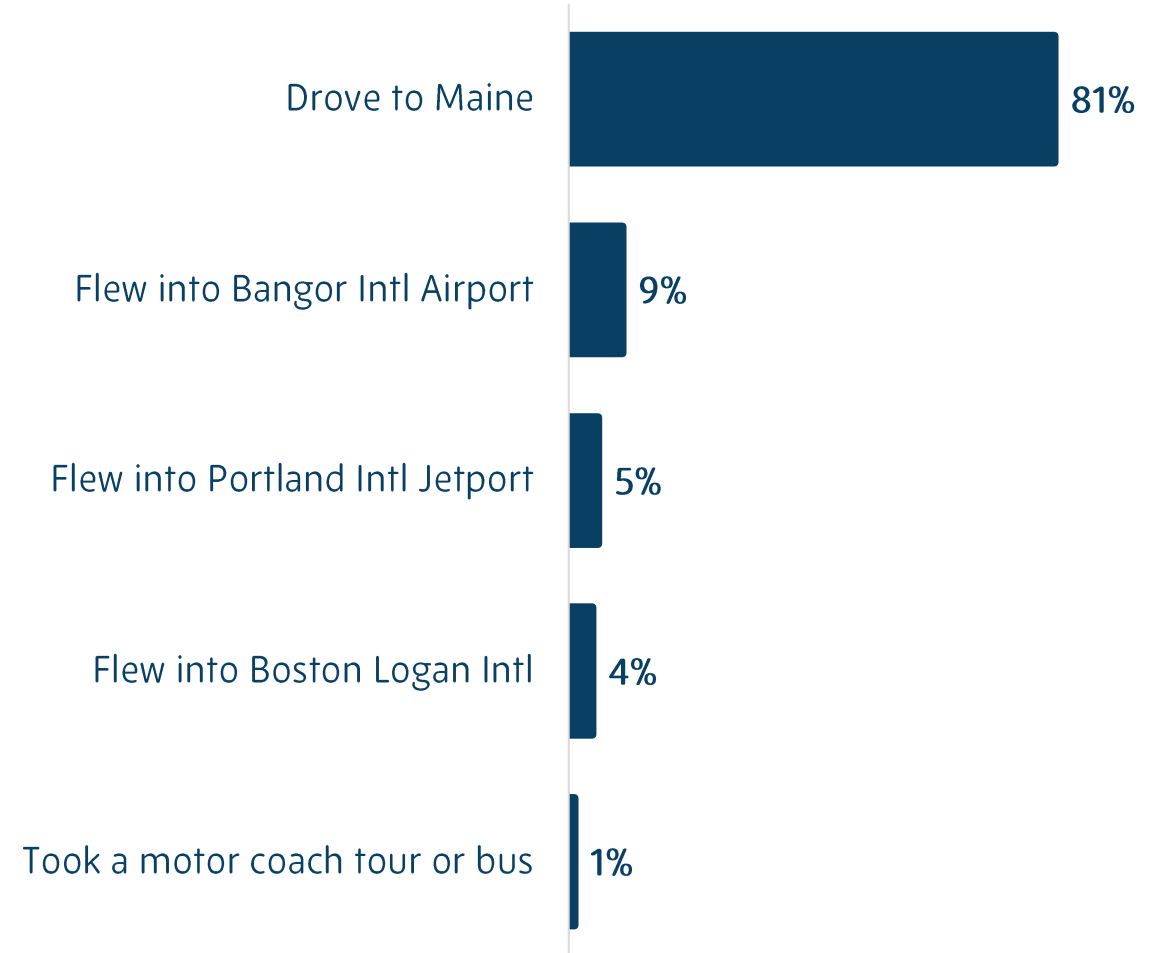
39%

VISITOR JOURNEY: TRIP EXPERIENCE



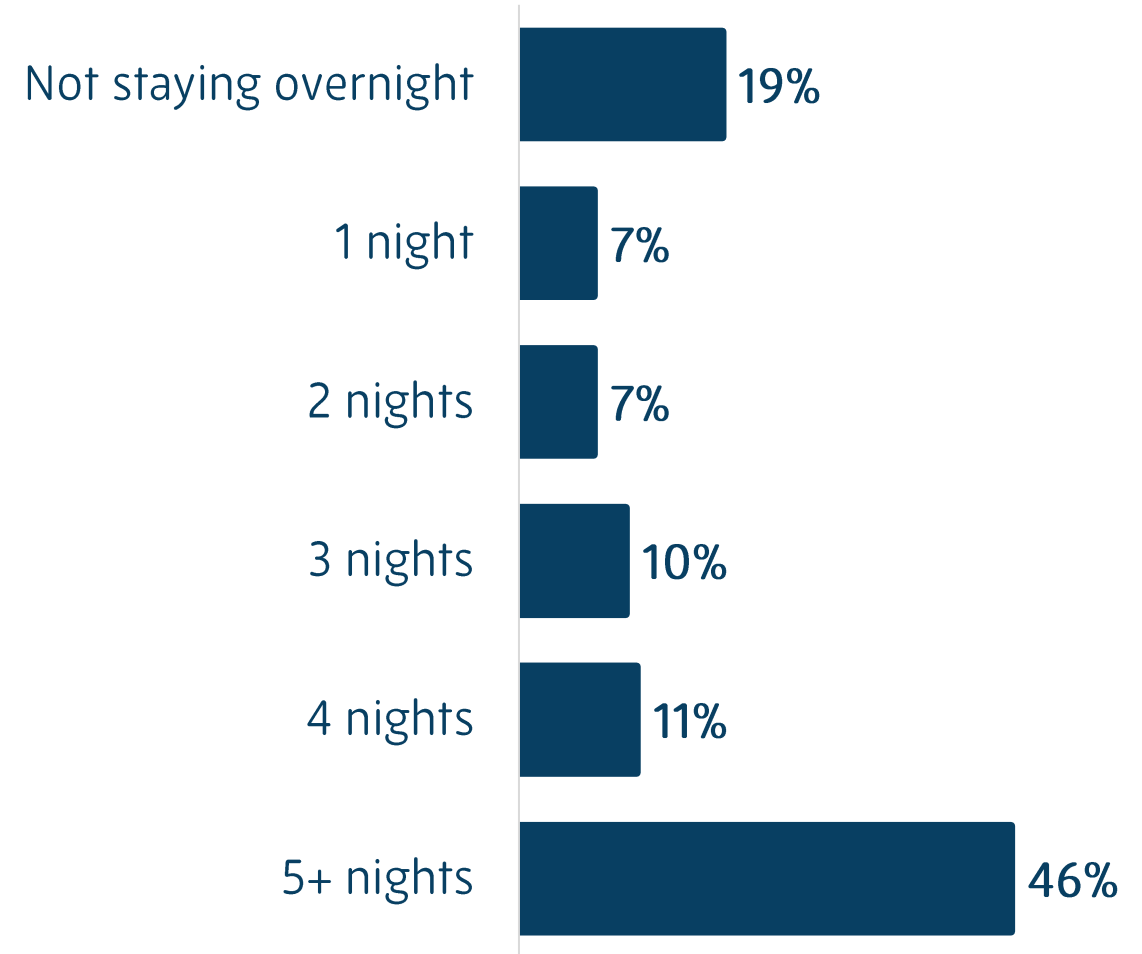
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **81%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Bangor International Jetport



NIGHTS STAYED

- » 81% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed 6.3* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 5.7 nights in Maine on their trips



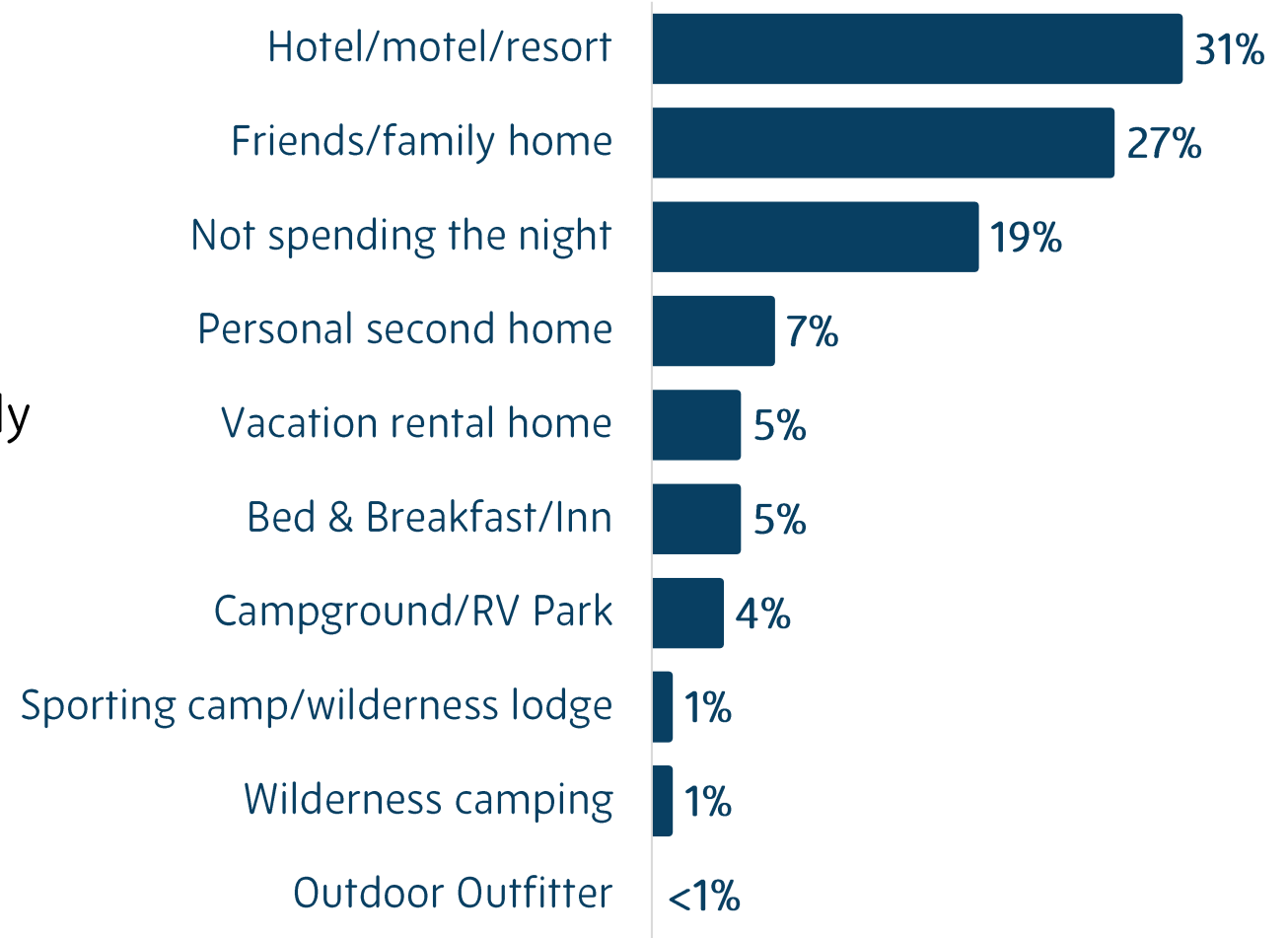
*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Maine Highlands

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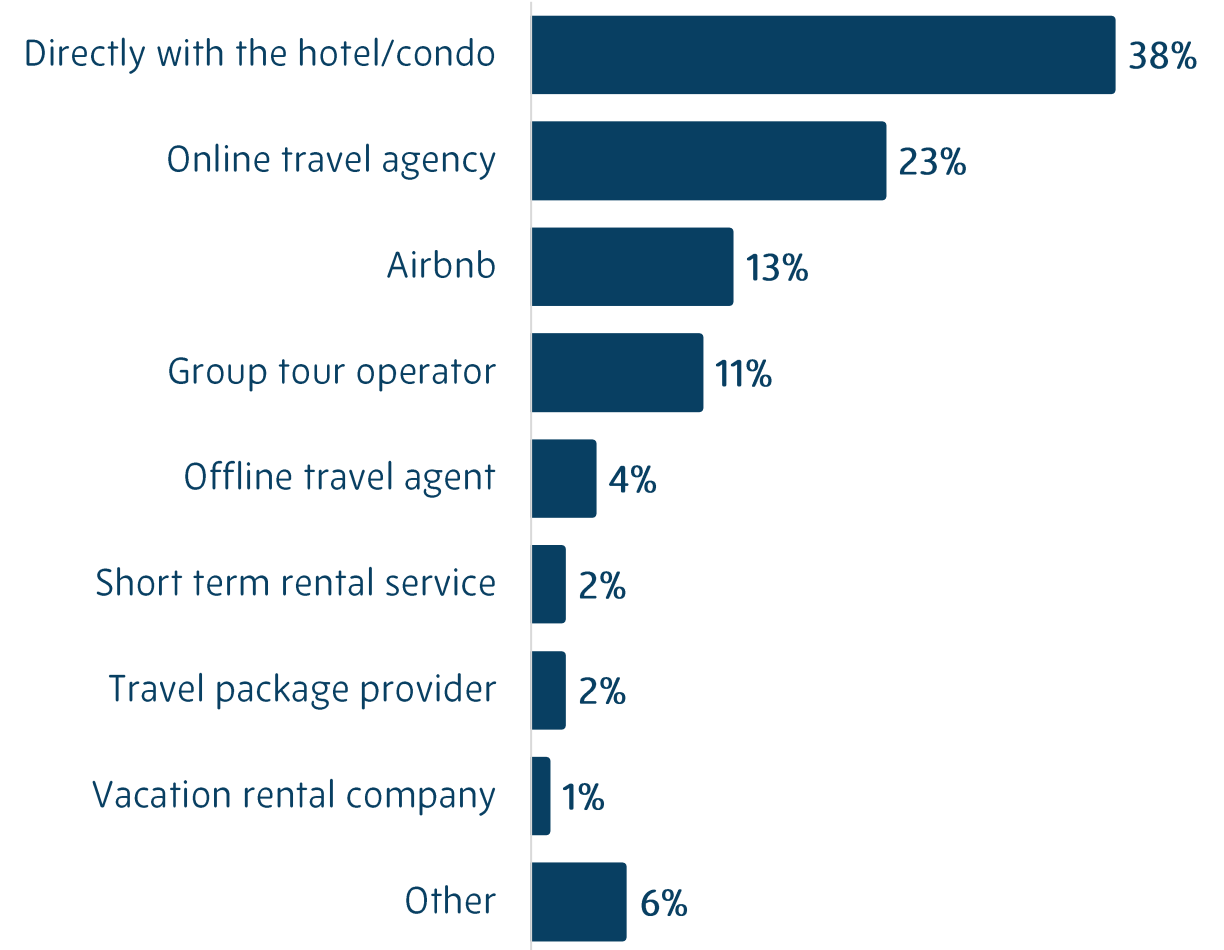
ACCOMMODATIONS

- » About **3 in 10** visitors stayed overnight in a hotel/motel/resort or stayed with friends/family
- » Nearly **1 in 5** visitors came just for the day



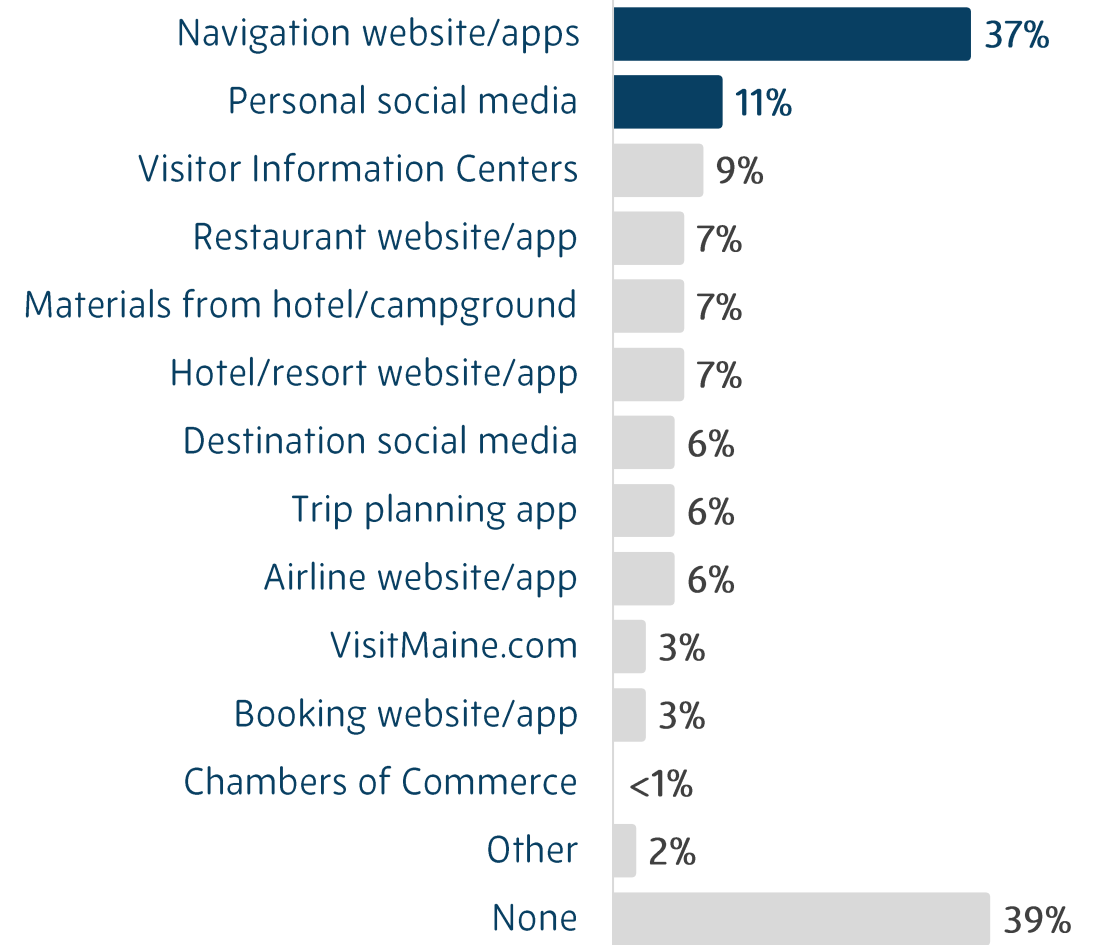
BOOKING METHODS

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



IN-MARKET VISITOR RESOURCES*

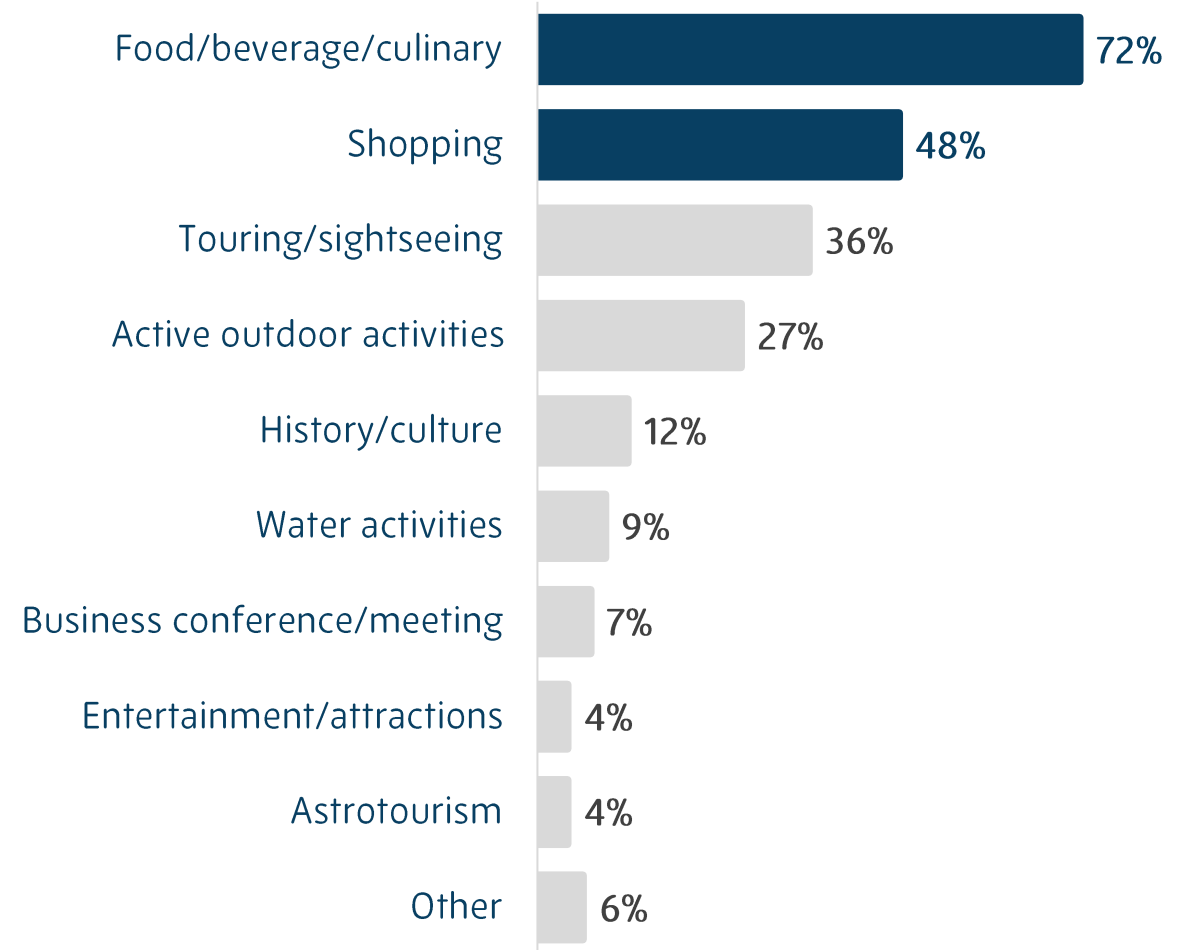
- » Visitors were more likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Nearly **2 in 5** visitors did not use any resources to plan activities while they were in-market



*Multiple responses permitted.

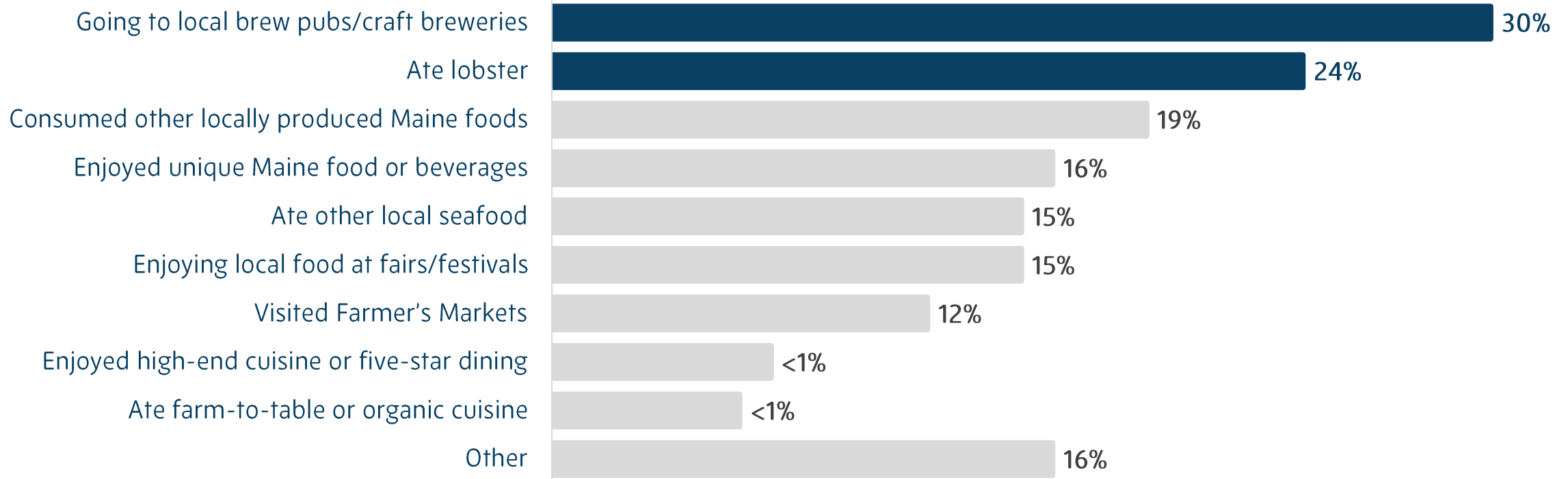
VISITOR ACTIVITIES*

- » Over **7 in 10** visitors engaged in food/beverage/culinary activities during their trip to Maine
- » Nearly **half** of visitors went shopping during their trip to Maine



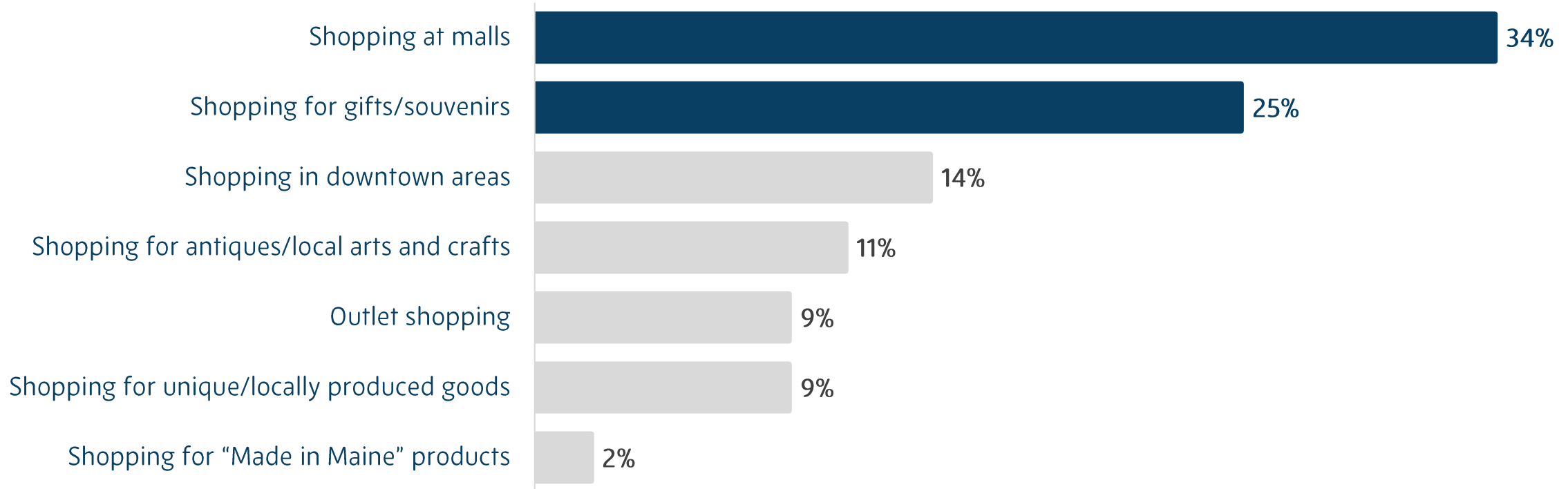
*Multiple responses permitted.

FOOD & BEVERAGE ACTIVITIES*

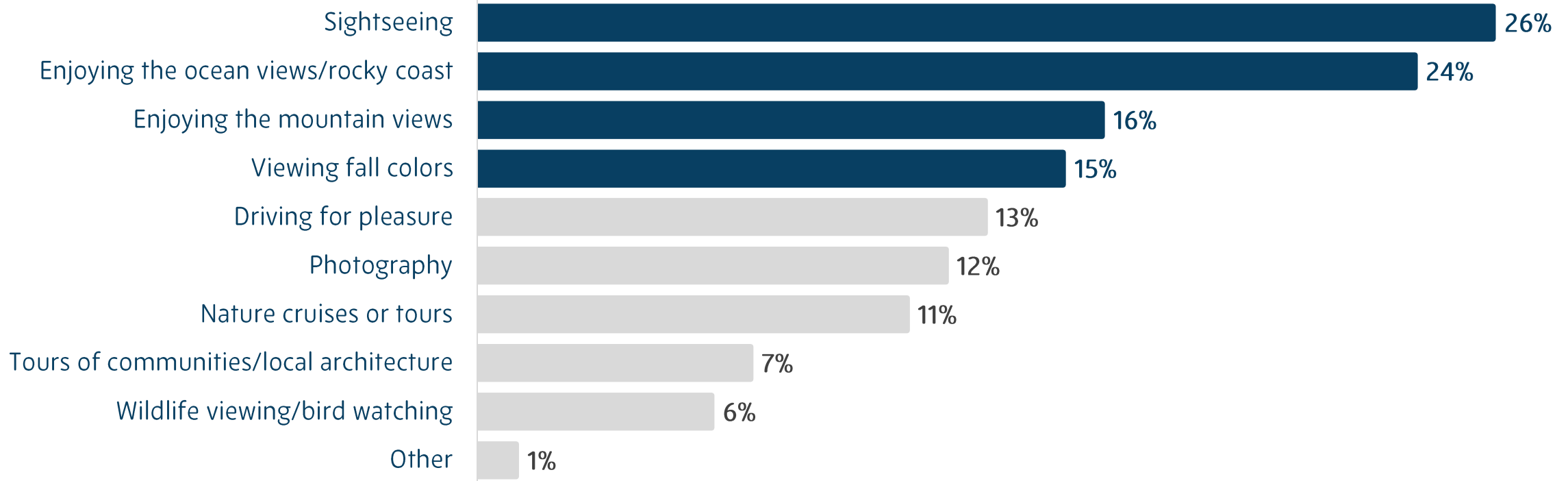


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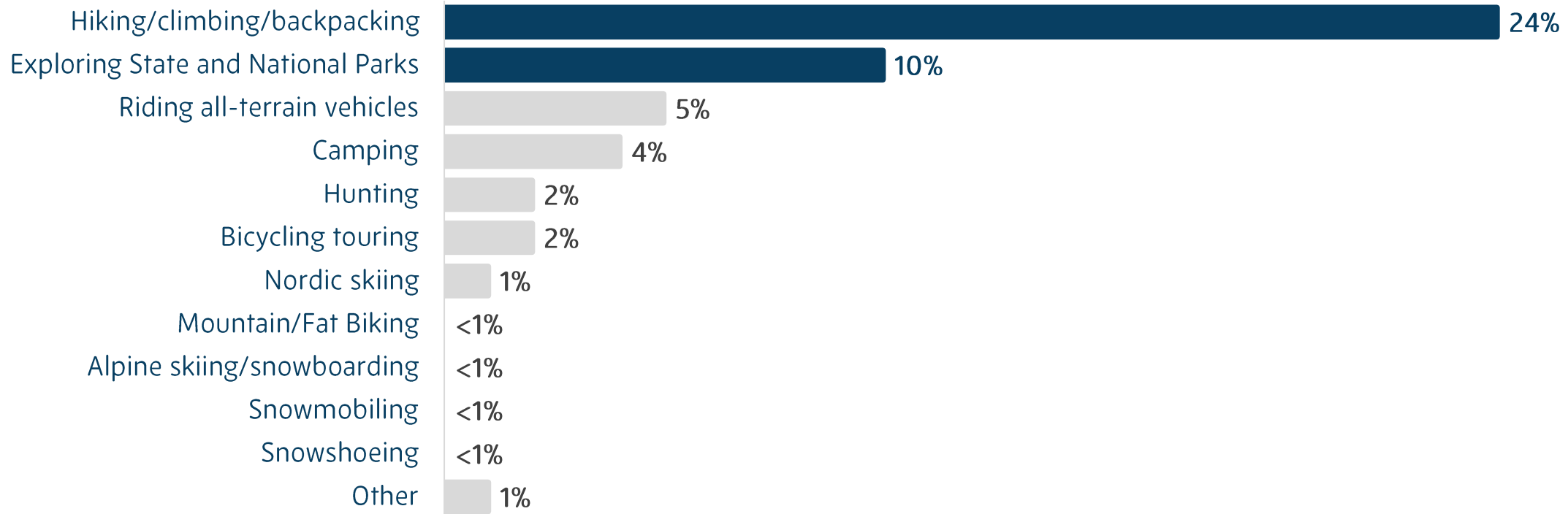
SHOPPING ACTIVITIES*



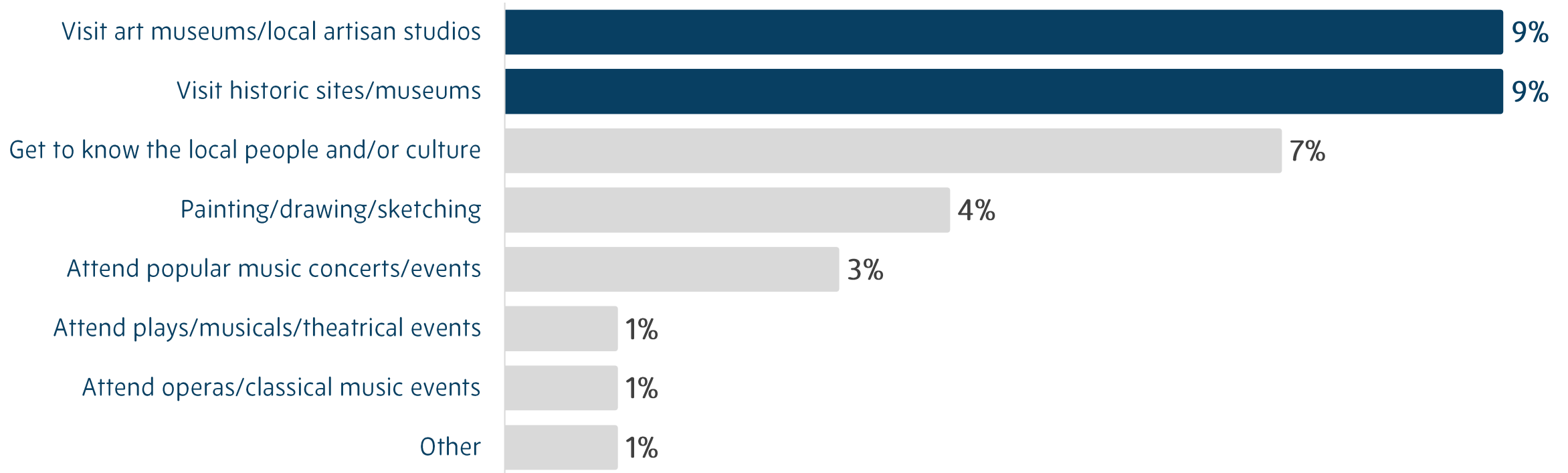
TOURING & SIGHTSEEING ACTIVITIES*



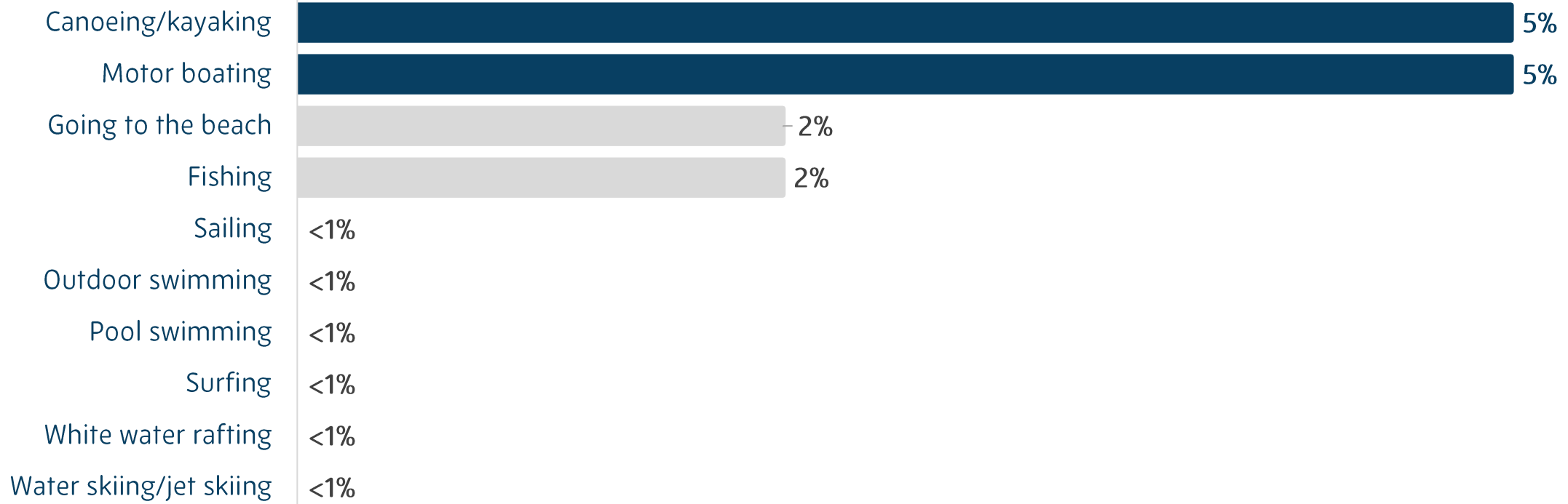
ACTIVE OUTDOOR ACTIVITIES*



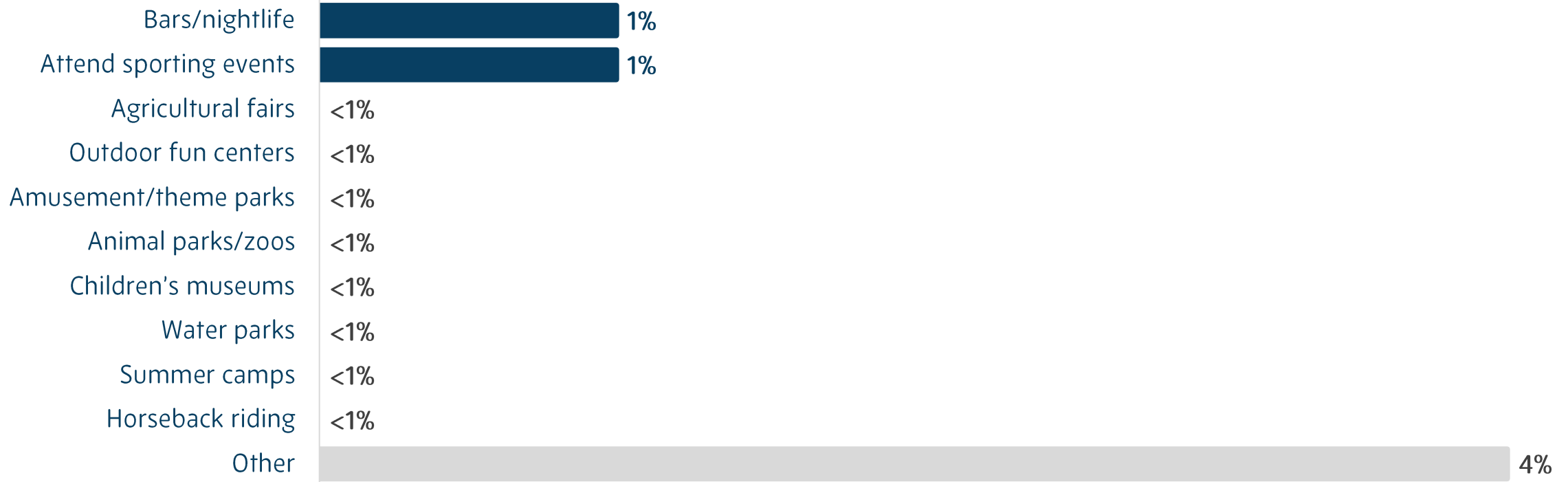
HISTORICAL & CULTURAL ACTIVITIES*



WATER ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

All Visitors

| | |
|--------------------------|--------------|
| Accommodations | \$94 |
| Transportation | \$65 |
| Groceries | \$22 |
| Restaurants | \$106 |
| Shopping | \$80 |
| Activities & Attractions | \$28 |
| Other | \$10 |
| Daily Spending | \$405 |

TOTAL TRAVEL PARTY SPENDING

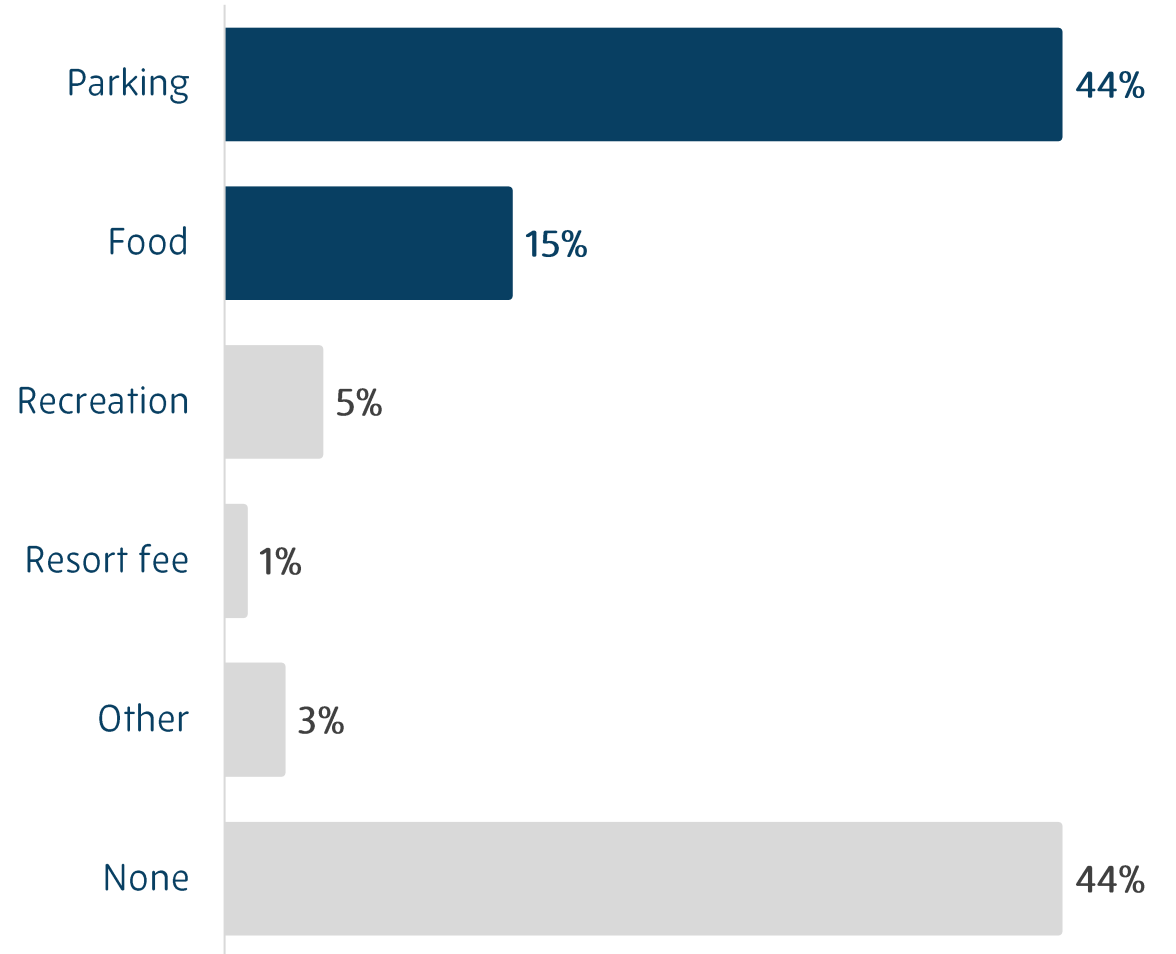
All Visitors

| | |
|--------------------------|-------|
| Accommodations | \$504 |
| Transportation | \$371 |
| Groceries | \$125 |
| Restaurants | \$604 |
| Shopping | \$456 |
| Activities & Attractions | \$160 |
| Other | \$57 |

| | |
|-----------------------|----------------|
| Total Spending | \$2,277 |
|-----------------------|----------------|

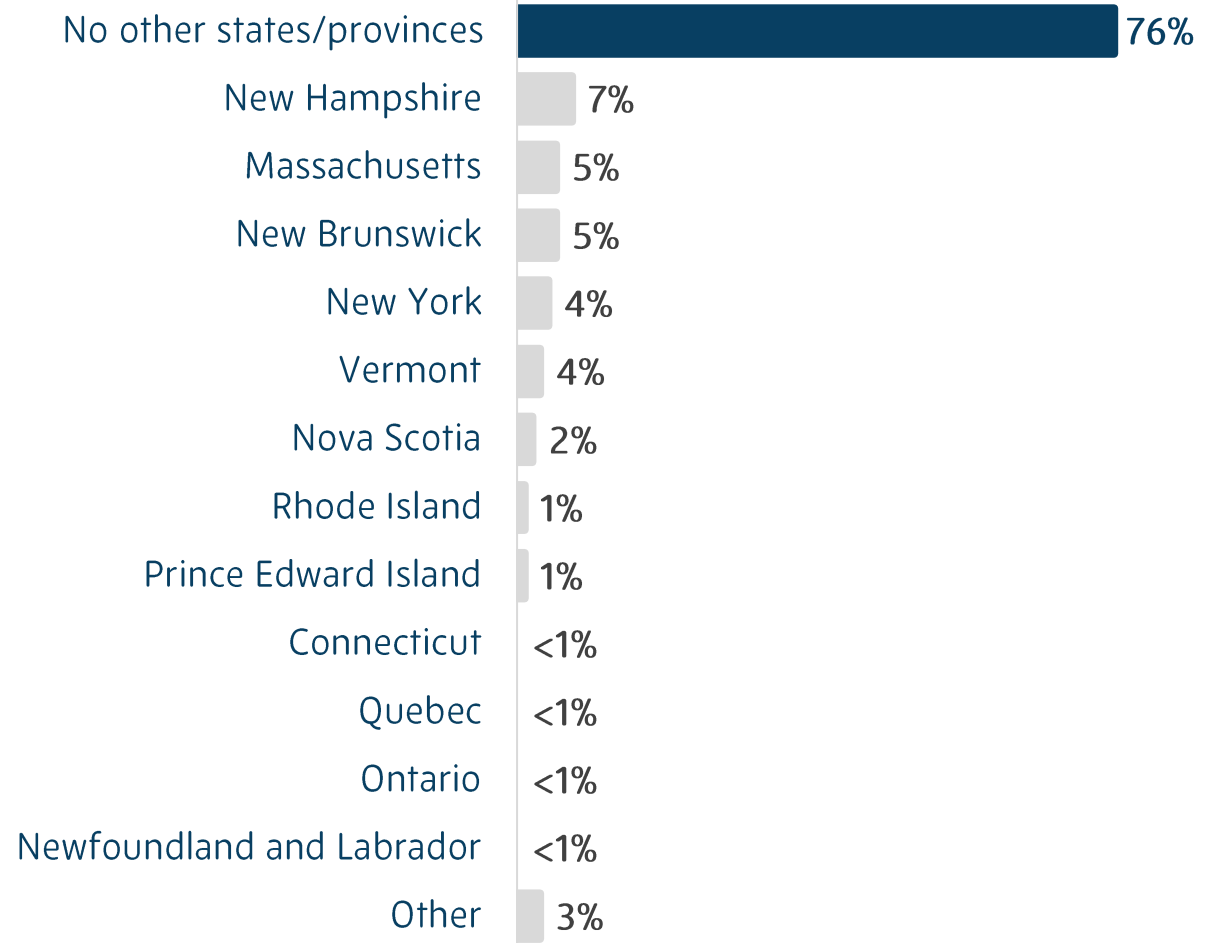
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for nearly **3 in 5** visitors
- » Price for accommodations included parking for over **2 in 5** visitors
- » Food was included in accommodations' pricing for **15%** of visitors



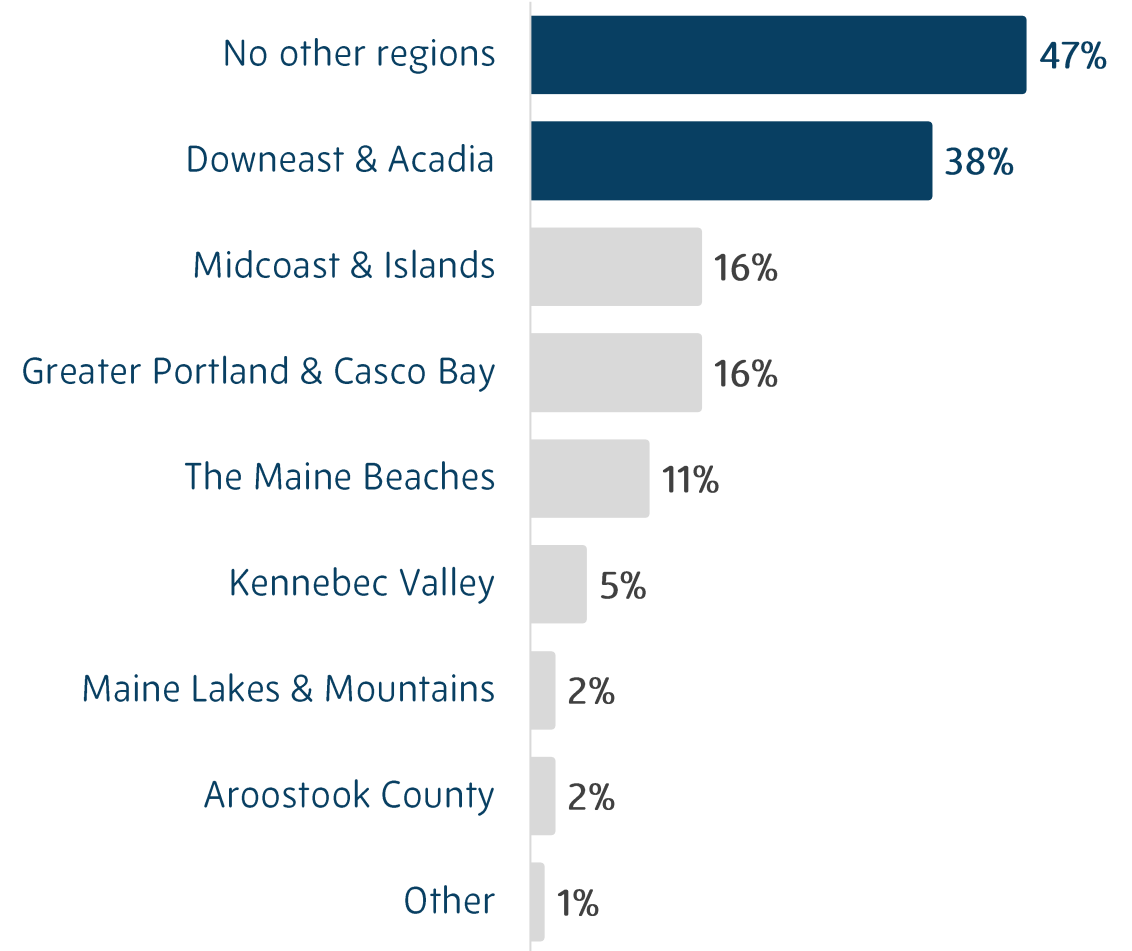
OTHER STATES & PROVINCES VISITED*

» Over **3 in 4** visitors did not visit any other U.S. state or Canadian province during their trip



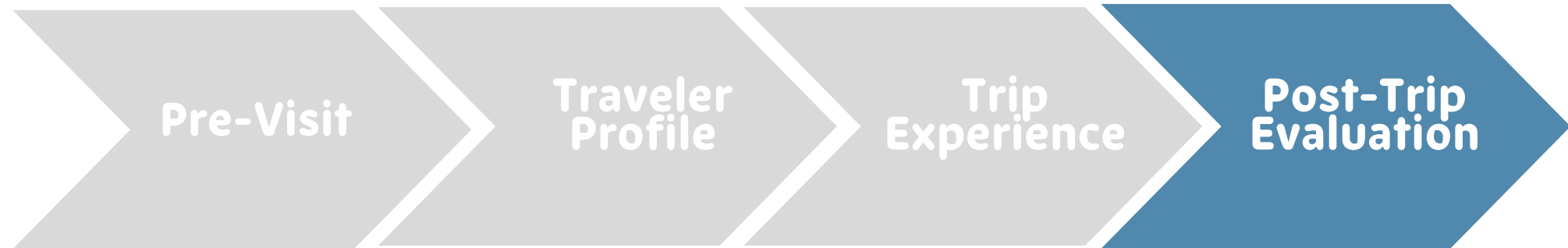
TRAVELING WITHIN MAINE*

- » Nearly **half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state
- » **38%** of visitors visited Downeast & Acadia in addition to their primary destination within Maine



*Multiple responses permitted.

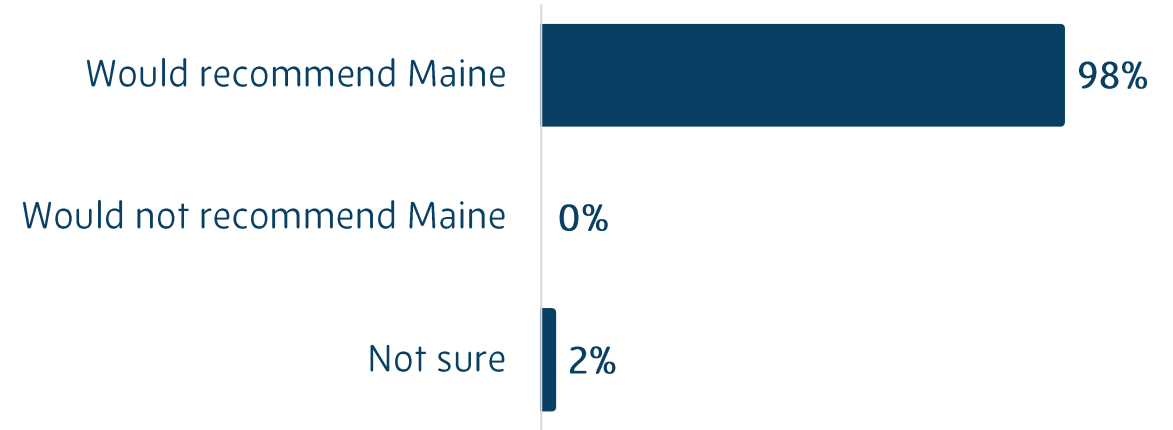
VISITOR JOURNEY: POST-TRIP EVALUATION



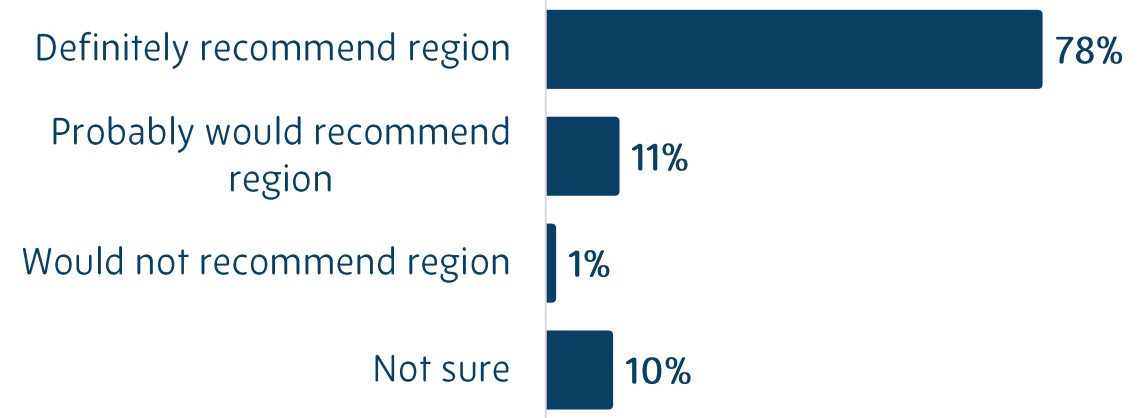
RECOMMENDING MAINE & ITS REGIONS

- » **98%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » **89%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **78%** would definitely recommend

Likelihood of Recommending Maine

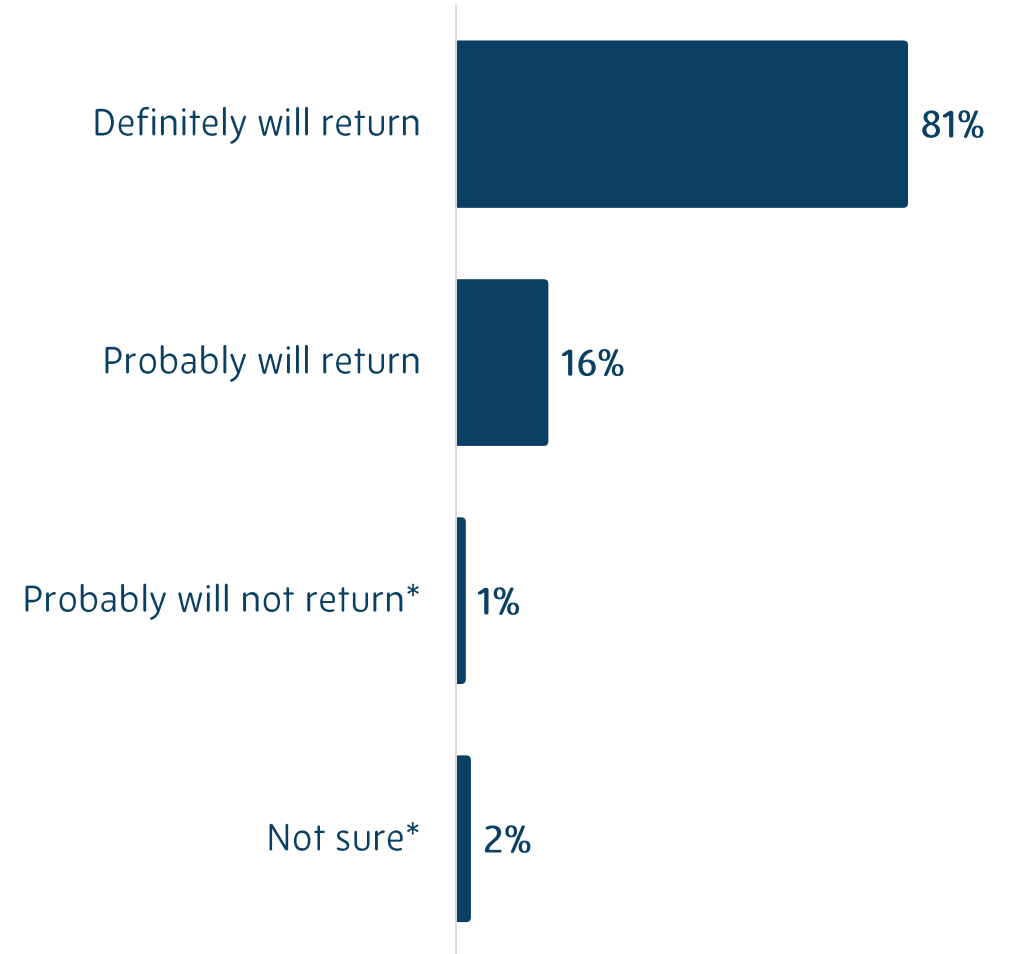


Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

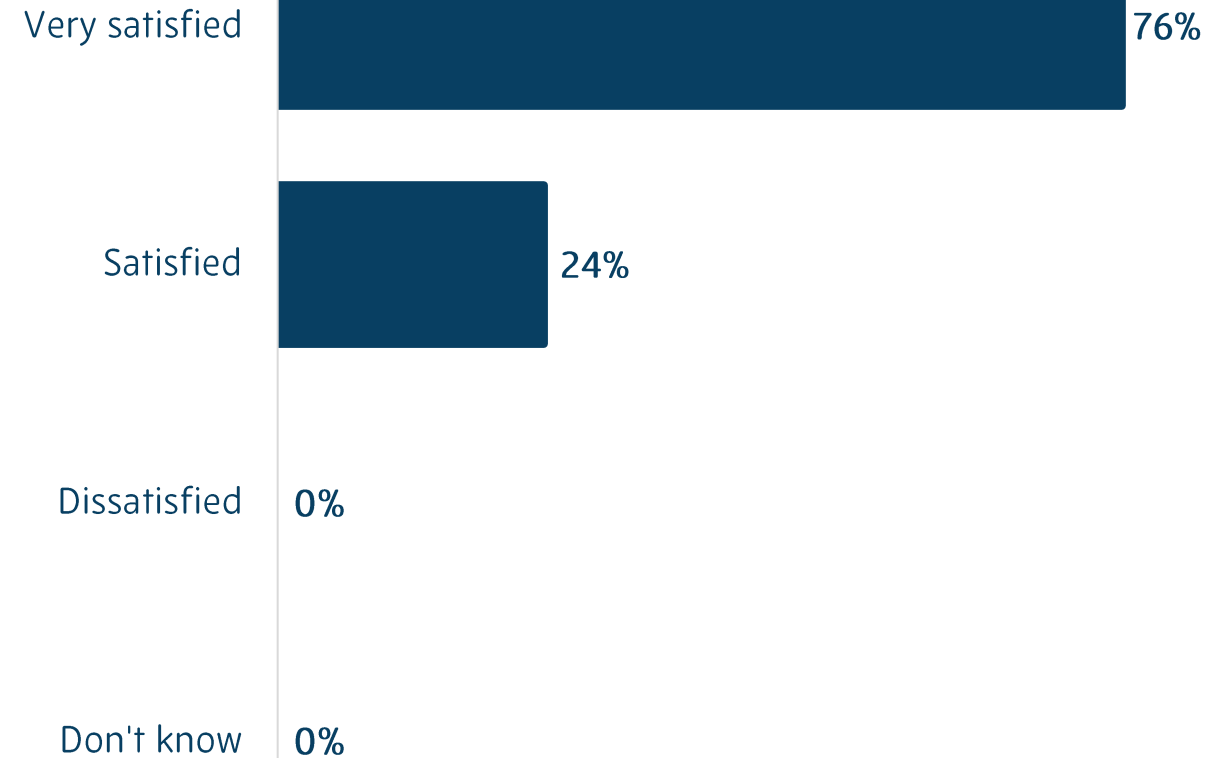
» **97%** of visitors will return to Maine for a future visit or vacation



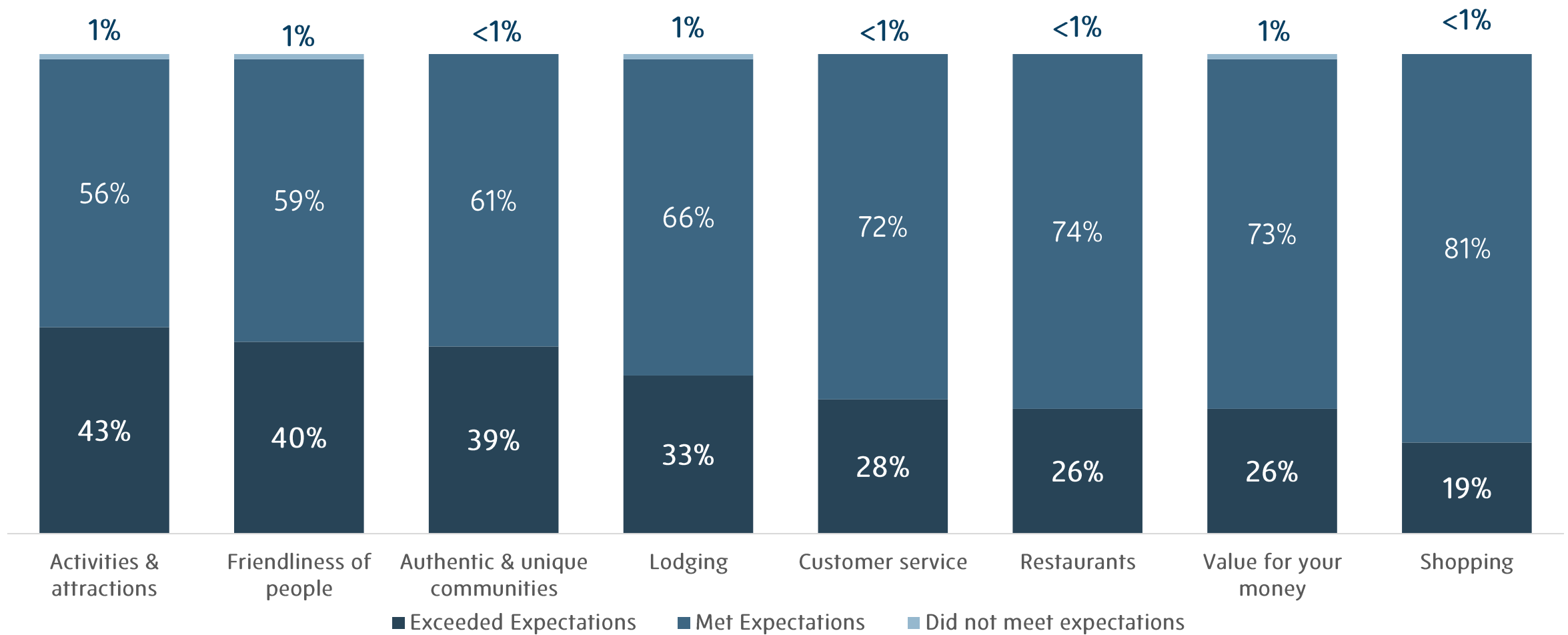
*3% of all visitors are not sure or will probably not return to Maine for the following reasons:
1. Prefer a variety of destinations 2. Limited, expensive airline service.

SATISFACTION

- » 100% of visitors were satisfied with their trip to Maine
- » Over 3 in 4 visitors were very satisfied with their trip to Maine

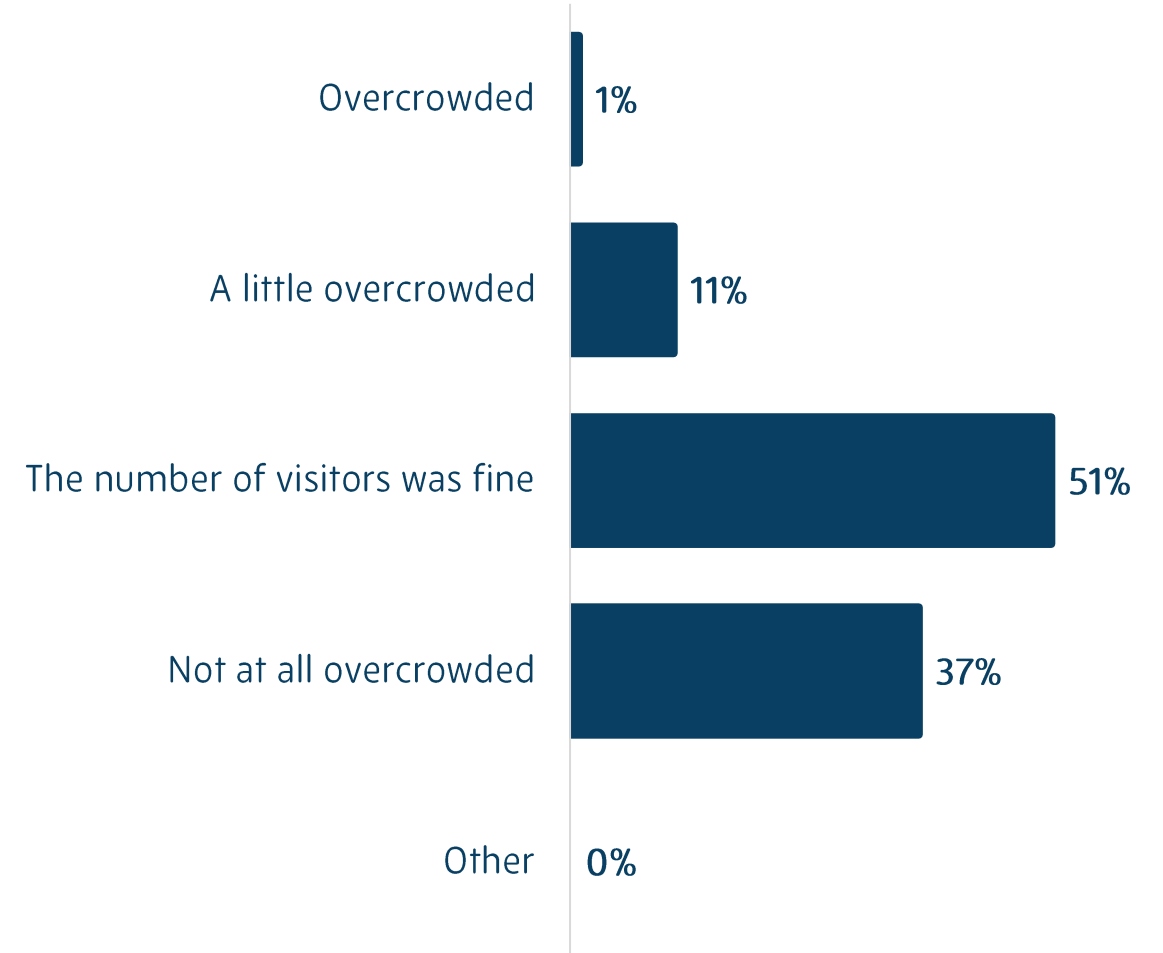


TRIP RATINGS



OVERCROWDING

- » 51% of visitors thought the number of visitors during their trip to Maine was fine
- » 11% of visitors thought it was a little overcrowded



STUDY METHODS



METHODOLOGY



Visitor Tracking

397 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 September 1st, 2023 and November 30th, 2023.

MAINE HIGHLANDS

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SEPTEMBER – NOVEMBER 2023

Downs & St. Germain Research
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dsg-research.com

