

# MAINE OFFICE OF TOURISM

*2021 Economic Impact & Visitor Tracking Report*

DECEMBER 2020 – NOVEMBER 2021

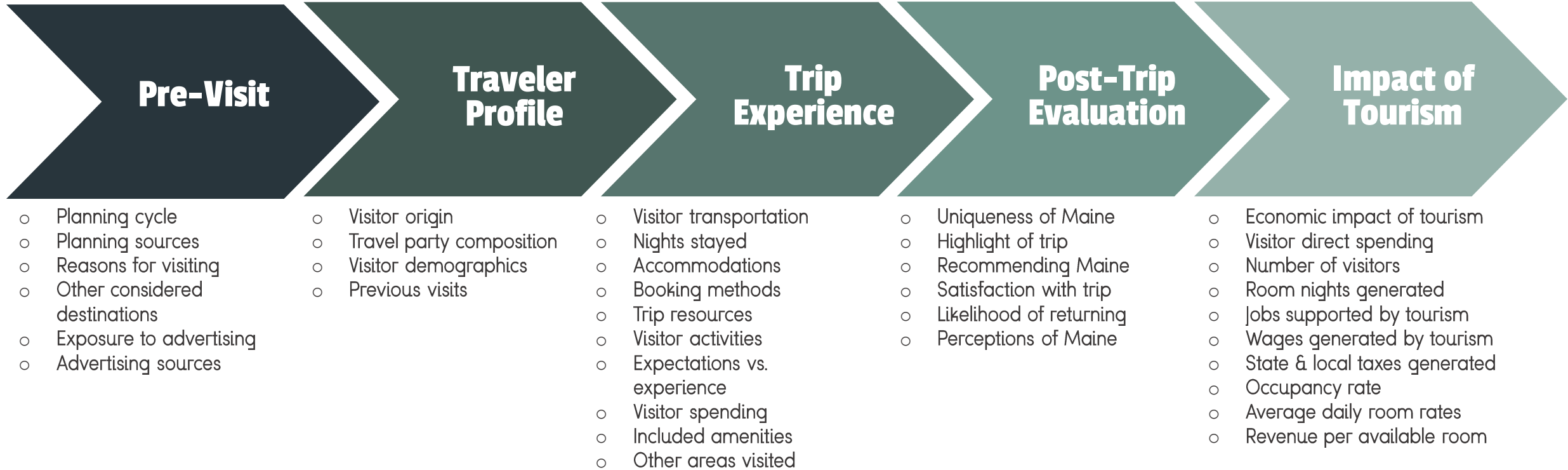




# INTRODUCTION



# STUDY OBJECTIVES: VISITOR JOURNEY



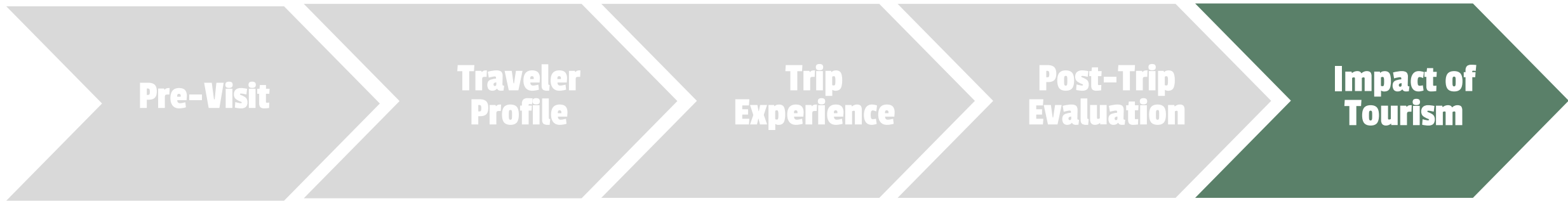


# EXECUTIVE SUMMARY





# TRIP PLANNING CYCLE : IMPACT OF TOURISM



# ECONOMIC IMPACT

Visitor spending generated

**\$14,451,155,200**

in economic impact to Maine's economy, up  
**61.1%** from 2020





# DIRECT SPENDING

Visitors to Maine spent

**\$7,853,094,700**

throughout the state in 2021 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **63.7%** from 2020



# VISITORS

Maine attracted

# 15,601,800

visitors in 2021, up **29.1%** from 2020





# ROOM NIGHTS

Visitors to Maine spent

# 10,247,600

nights in Maine accommodations throughout  
2021, up **37.7%** from 2020



# JOBS SUPPORTED

Visitors to Maine supported the creation of

# 126,300\*

jobs throughout the state in 2021, up  
**15.6%** from 2020\*



\*2020 and 2021 figures have been updated due to revised IMPLAN models.



# WAGES GENERATED

Visitors to Maine supported

**\$5,365,368,500\***

in wages paid to Maine employees in 2021, up +  
**29.2%** from 2020\*



\*2020 and 2021 figures have been updated due to revised IMPLAN models.

# VISITORS & JOBS

Every

**124\***

visitors supports a new job in Maine



\*2021 figures have been updated due to revised IMPLAN models.



# HOUSEHOLD SAVINGS

Visitors to Maine saved local households

# \$2,050

in state and local taxes in 2021



# LODGING METRICS

Occupancy Rate

**49.4%**

**+ 36.8% from 2020**

Average Daily Rate

**\$146.32**

**+ 14.5% from 2020**

Revenue per Available Room

**\$72.28**

**+ 56.7% from 2020**



# TRIP PLANNING CYCLE : PRE-VISIT



# TRIP PLANNING CYCLE

- » **64%** of visitors started planning their trip a month or more in advance of their trip
- » **7 in 10** visitors have a booking window of less than 3 months





# TOP ONLINE TRIP PLANNING SOURCES\*



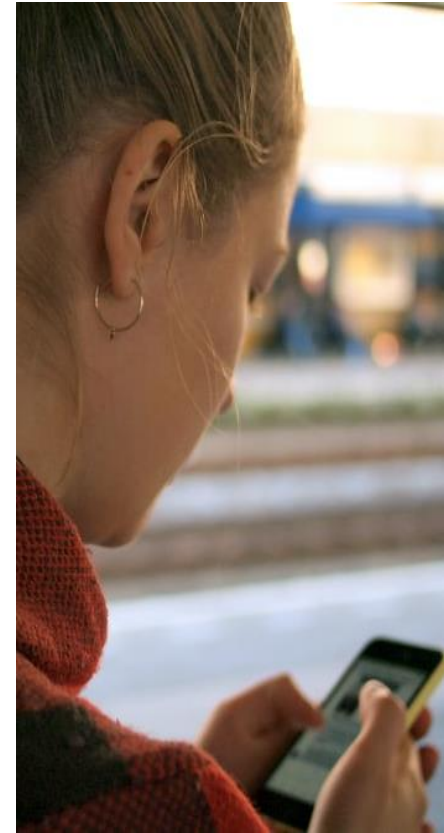
**31%** Online search engines



**13%** Hotel websites



**12%** TripAdvisor



**12%** Online travel agency



**10%** VisitMaine.com

\*Multiple responses permitted.

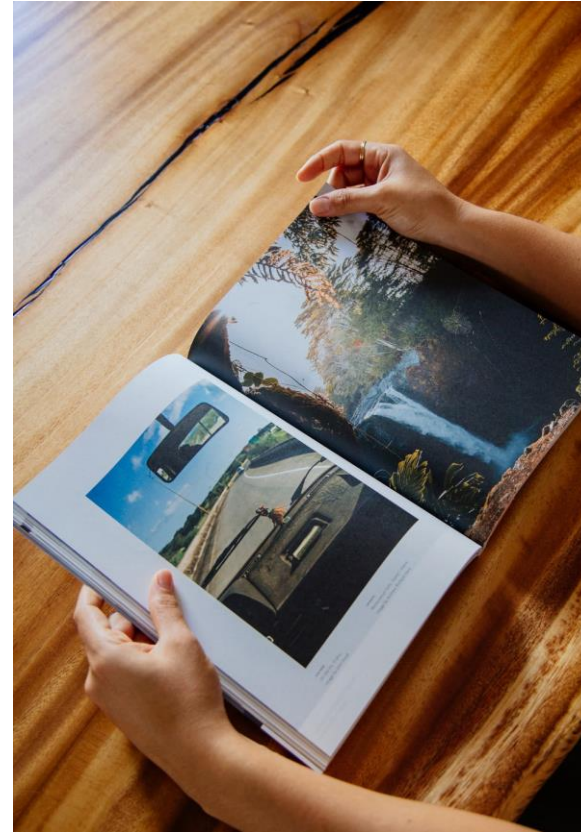
# TOP OTHER TRIP PLANNING SOURCES\*



**31%** Advice from friends/  
family



**9%** Travel guides/  
brochures



**8%** Travel books &  
magazines



**8%** Articles or travelogues

\*Multiple responses permitted.



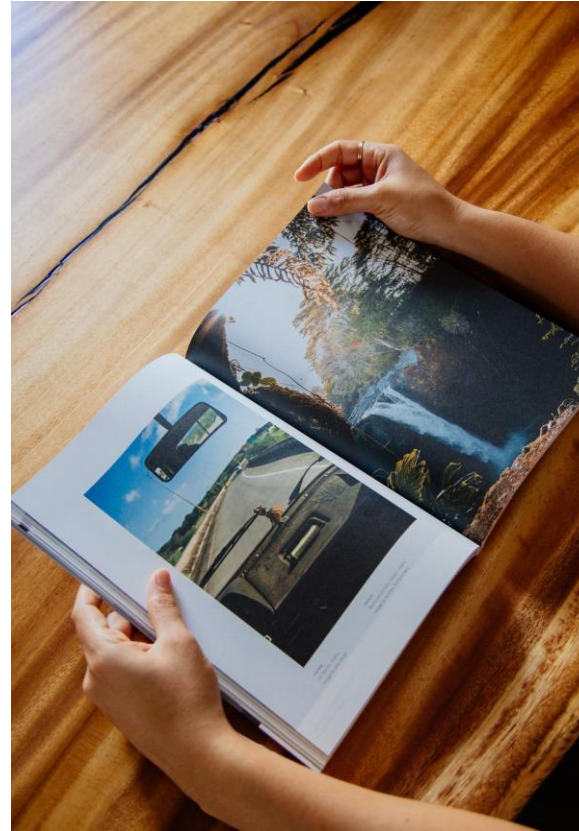
# TOP REASONS FOR VISITING\*



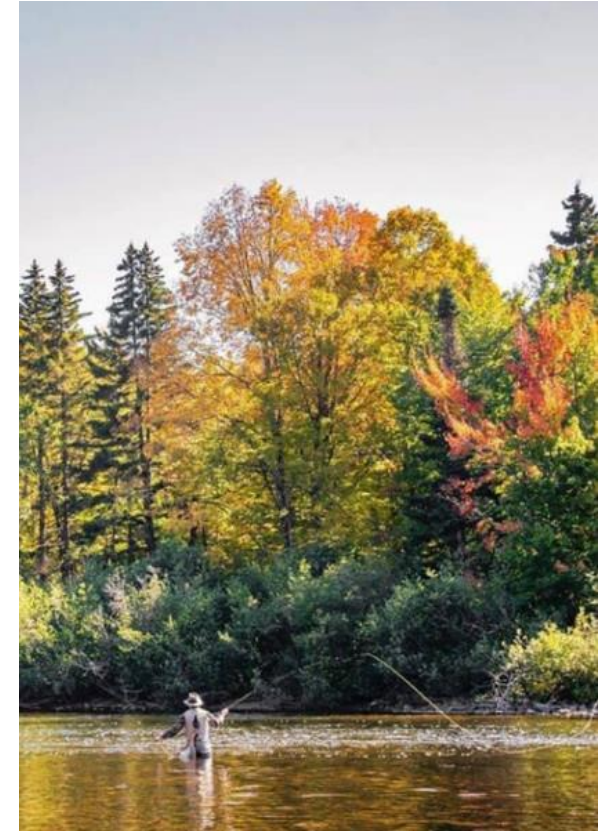
**38%** Relax and unwind



**26%** Visiting friends/family



**25%** Sightseeing/touring



**15%** Nature & birdwatching

\*Multiple responses permitted.



# CONSIDERING MAINE AS A DESTINATION

- » **72%** of visitors did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip



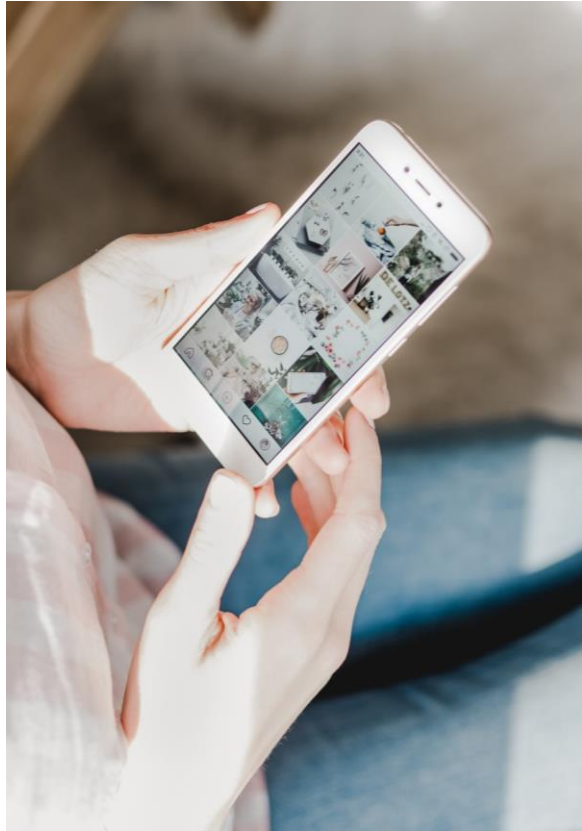
# PRE-TRIP EXPOSURE TO ADVERTISING

- » **37%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip





# TOP SOURCES OF ADVERTISING EXPOSURE\*



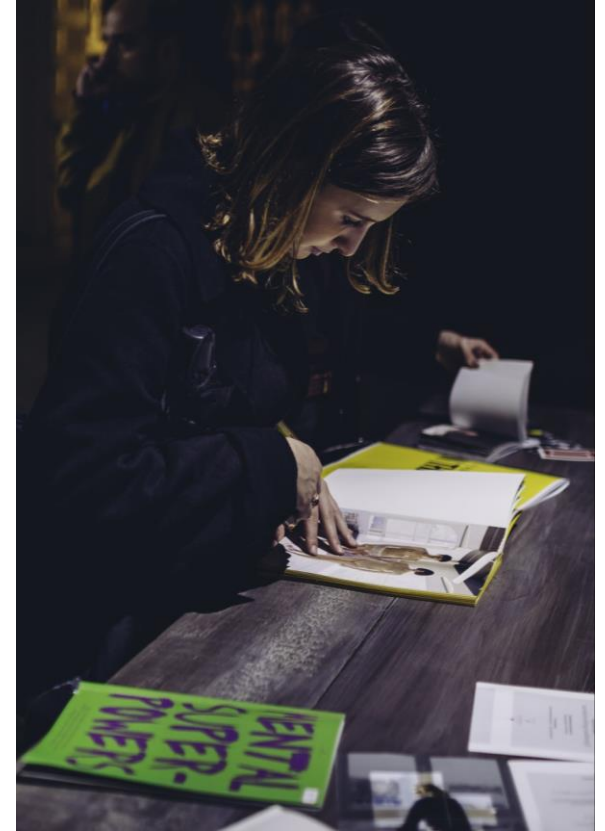
**36%** Social media



**34%** Internet



**21%** Cable or satellite television



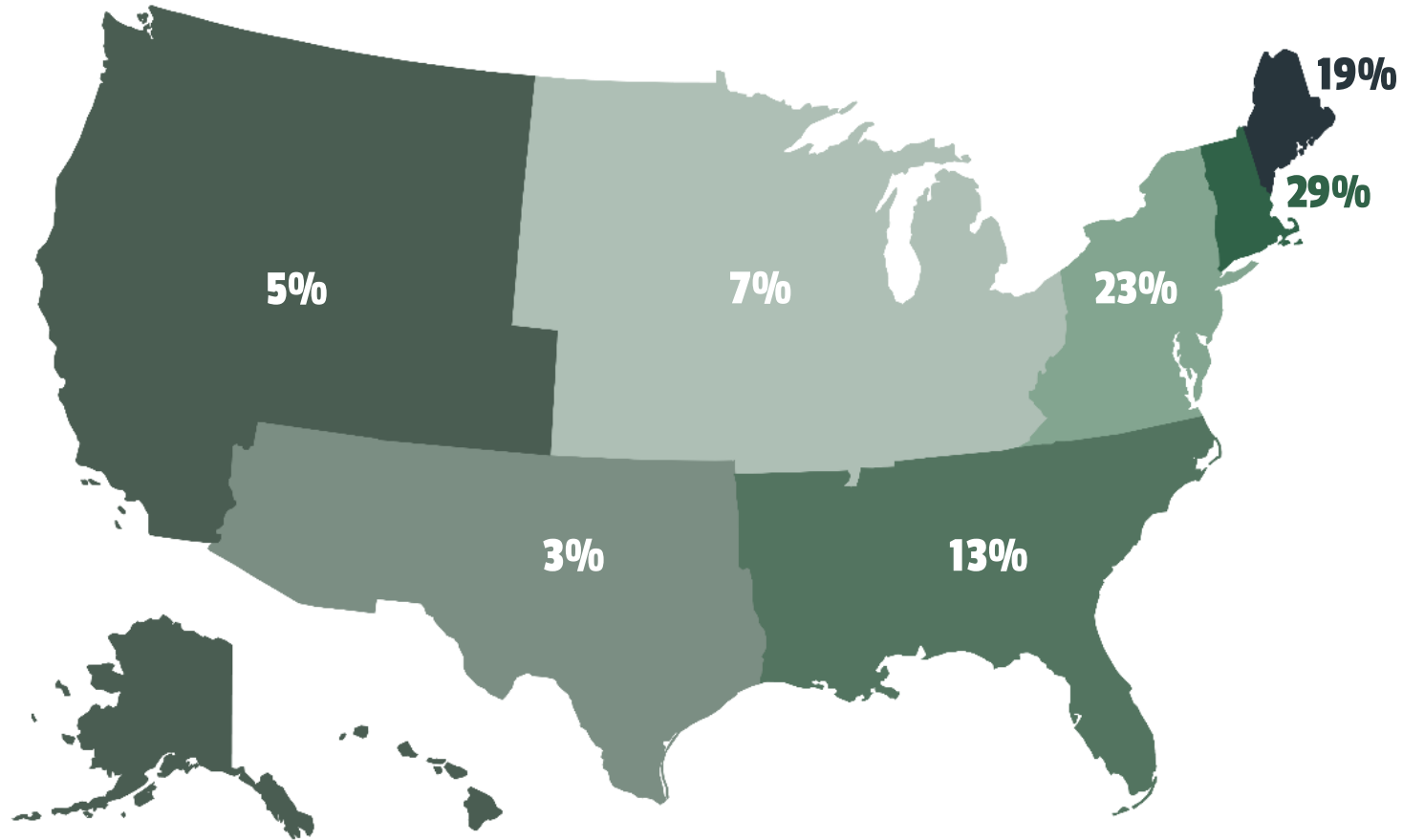
**18%** Magazine

\*Multiple responses permitted.

# TRIP PLANNING CYCLE : TRAVELER PROFILE



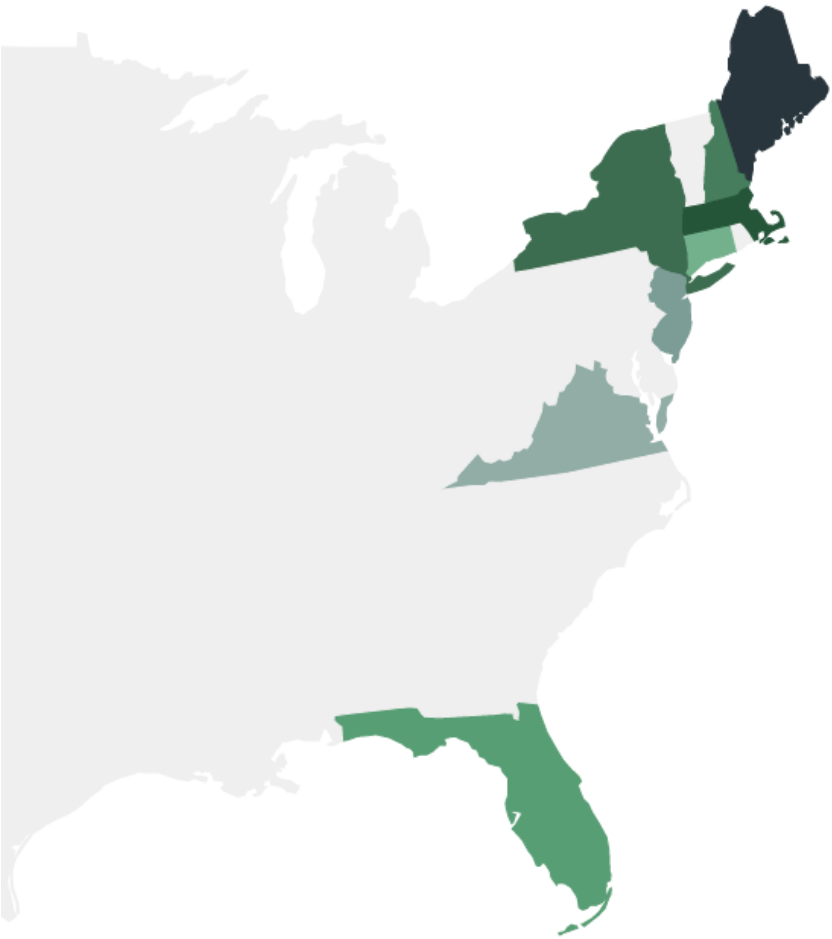
# REGIONS OF ORIGIN



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



# TOP ORIGIN STATES & PROVINCES



# 66%

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

- 19% Maine
- 13% Massachusetts
- 10% New York
- 8% New Hampshire
- 5% Florida
- 4% Connecticut
- 4% New Jersey
- 3% Virginia

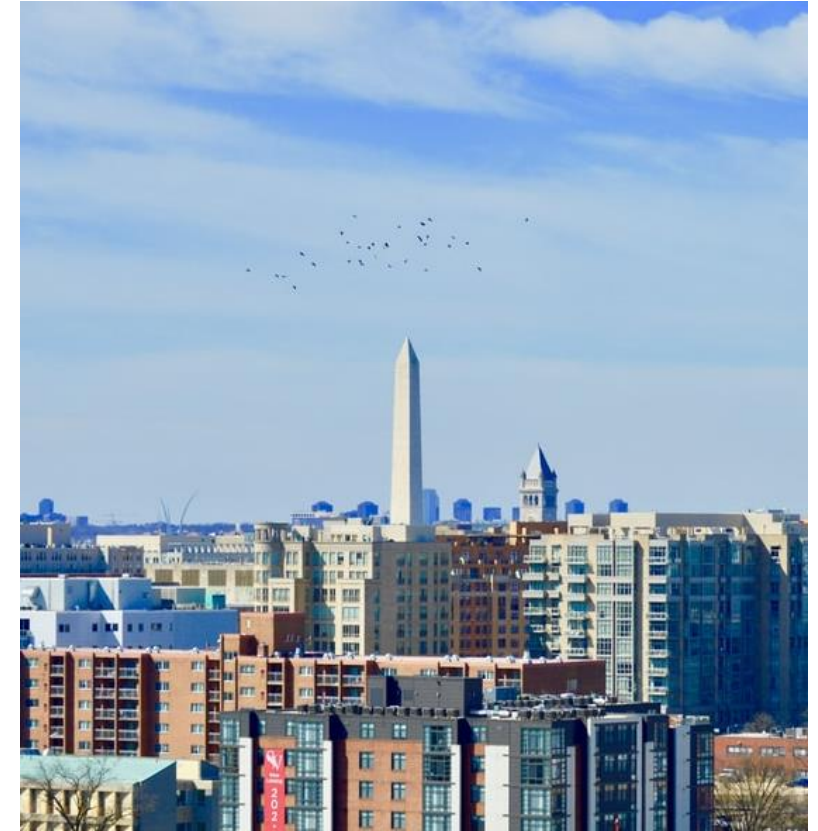
# TOP ORIGIN MARKETS



**10%** New York City<sup>1</sup>



**7%** Boston



**4%** Washington D.C. - Baltimore<sup>2</sup>

<sup>1</sup>Includes some markets in New Jersey, Pennsylvania, and Connecticut.

<sup>2</sup>Includes some markets in Maryland, Virginia, and West Virginia.



# TRAVEL PARTIES

The typical Maine visitor traveled with **2.7** people in their visitor party



**1 in 5** visitors traveled with at least one person under the age of 18 in their travel party





# DEMOGRAPHIC PROFILE



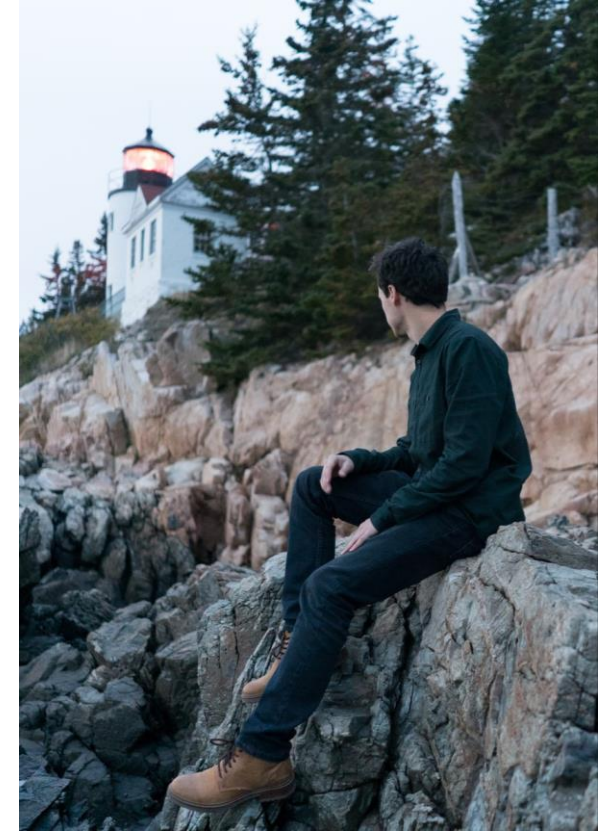
**48** Years old<sup>1</sup>



**54%** Female\*



**73%** College graduate



**89%** White/Caucasian

\*Of visitors interviewed.  
<sup>1</sup>Median age.



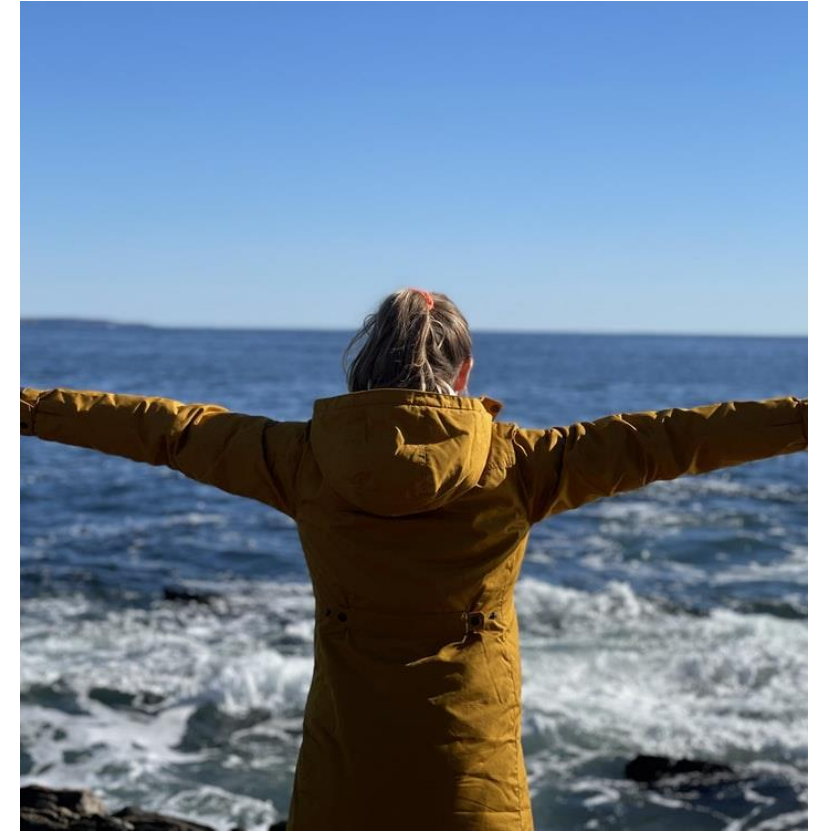
# LIFESTYLE PROFILE



**74%** Married/domestic partnership



**54%** Employed full-time



**\$89,800** Annual household income<sup>1</sup>

<sup>1</sup>Median household income.

# NEW & RETURNING VISITORS

- » **23%** of visitors were traveling in Maine for the first time
- » **36%** of visitors had previously traveled in Maine more than 10 times





# TRIP PLANNING CYCLE : TRIP EXPERIENCE



# TRANSPORTATION

- » **83%** of visitors drove to their Maine destination
- » **6%** of visitors flew to Maine through Portland International Jetport



# NIGHTS STAYED

- » **72%** of visitors spent one or more nights in Maine
- » Typical visitors stayed **5.7** nights in Maine on their trip





# TOP ACCOMMODATIONS



**25%** Hotel/motel/resort



**19%** Friends/family home



**28%** Did not stay overnight



# TOP IN-MARKET VISITOR RESOURCES\*



**37%** Navigation websites/apps



**19%** Restaurant website/app



**18%** Visitor Information Centers

\*Multiple responses permitted.



# TOP VISITOR ACTIVITIES\*



**65%** Food/beverage/  
culinary



**52%** Touring/sightseeing



**40%** Active outdoor  
activities



**40%** Shopping

\*Multiple responses permitted.



# VISITING OTHER STATES & PROVINCES

- » **3 in 4** visitors did not visit any other U.S. state or Canadian province on their trip to Maine
- » In 2021, 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 half** of visitors traveled to regions other than their primary destination during their trips to Maine



# TRIP PLANNING CYCLE : POST-TRIP EVALUATION





# TOP UNIQUE DESTINATION ATTRIBUTES\*



## **Breathtaking coastal & mountain views**

*“Spectacular coastline and beaches, beautiful fall foliage, and good seafood.”*

## **Exciting & fun attractions**

*“The weather is wonderful this time of year. People are welcoming, and there’s tons of things to do.”*

## **Picturesque nature & wildlife**

*“The natural beauty, rocky coastline, dense forests and rolling mountains, hiking through the mountains or skiing in world-class resorts.”*

\*Coded open-ended responses.  
Multiple responses permitted.

# TOP TRIP HIGHLIGHTS\*



## Enjoy the outdoors

*“The peninsulas we went to were beautiful and Acadia National Park was stunning.”*

## Enjoy the beaches & rocky coastline

*“The ocean, the beaches, the coastline, and seeing the fall foliage.”*

## Spend time with friends and family

*“Stirring up memories of our childhood vacations.”*

\*Coded open-ended responses.  
Multiple responses permitted.



# RECOMMENDING MAINE & ITS REGIONS

- » **97%** of visitors would recommend Maine to a friend or relative as a vacation destination
- » **94%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip



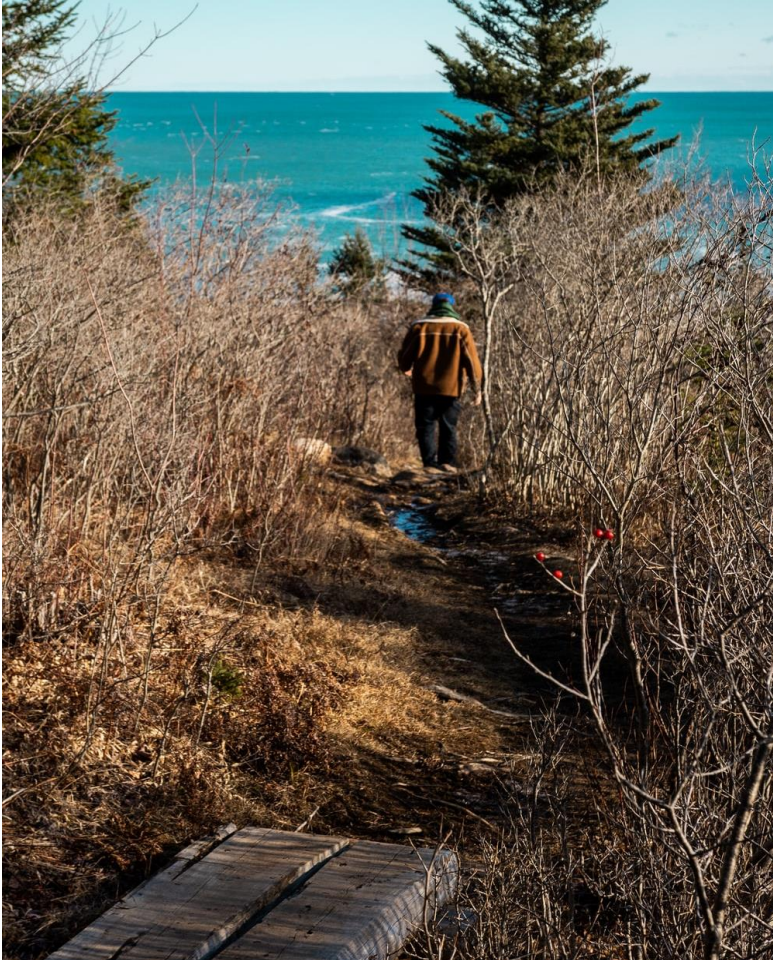


# LIKELIHOOD OF RETURNING TO MAINE

- » **94%** of visitors will return to Maine for a future visit or vacation
- » **77%** of visitors were highly-satisfied with their trip in Maine and will “definitely return” in the future



# TOP PERCEPTIONS OF MAINE\*



## **Breathtaking & scenic**

*“Yesterday I sat on my screened-in porch with a good book, listening to the waves crashing on the rocks and watching fishing boats hauling their traps. Perfect.”*

## **Relaxing & peaceful**

*“You have to go. It’s like recharging your battery.”*

## **Friendly local communities**

*“Welcoming communities, beautiful scenery, and endless activities.”*

\*Coded open-ended responses.  
Multiple responses permitted.



# DETAILED FINDINGS





# TRIP PLANNING CYCLE : IMPACT OF TOURISM



# KEY PERFORMANCE INDICATORS

Economic Impact	2019	2020	2021	Δ% from '19	Δ% from '20
Number of Visitors	16,484,100	12,082,900	15,601,800	- 5.4%	+ 29.1%
Room nights generated	9,484,300	7,443,100	10,247,600	+ 8.0%	+ 37.7%
Taxes generated	\$1,013,374,200	\$744,549,002	\$1,147,884,700	+ 13.3%	+ 54.2%
Direct expenditures	\$6,527,688,400	\$4,796,040,600	\$7,853,094,700	+ 20.3%	+ 63.7%
Total economic impact	\$12,206,777,300	\$8,968,595,900	\$14,451,155,200	+ 18.4%	+ 61.1%



# NUMBER OF VISITORS

Visitors	2019	2020	2021	Δ% from '19	Δ% from '20
Out-of-State Visitors	11,703,800	8,578,900	12,609,900	+ 7.7%	+ 47.0%
Maine Residents	4,780,300	3,504,000	2,991,900	- 37.4%	- 14.6%
Total Visitors	16,484,100	12,082,900	15,601,800	- 5.4%	+ 29.1%

# EMPLOYMENT IMPACTS

Maine Jobs	2019	2020	2021	Δ% from '19	Δ% from '20
Jobs generated (direct)	85,300	75,700*	86,900*	+ 1.8%	+ 14.8%
Total employment impact	113,500	109,300*	126,300*	+ 11.3%	+ 15.6%

Maine Wages	2019	2020	2021	Δ% from '19	% Change
Wages paid (direct)	\$2,559,429,000	\$2,503,942,300*	\$3,206,464,700*	+ 25.3%	+ 28.1%
Total impact on wages	\$3,720,997,500	\$4,154,087,200*	\$5,365,368,500*	+ 44.2%	+ 29.2%

\*2020 and 2021 figures have been updated due to revised IMPLAN models.



# RETURN ON INVESTMENT

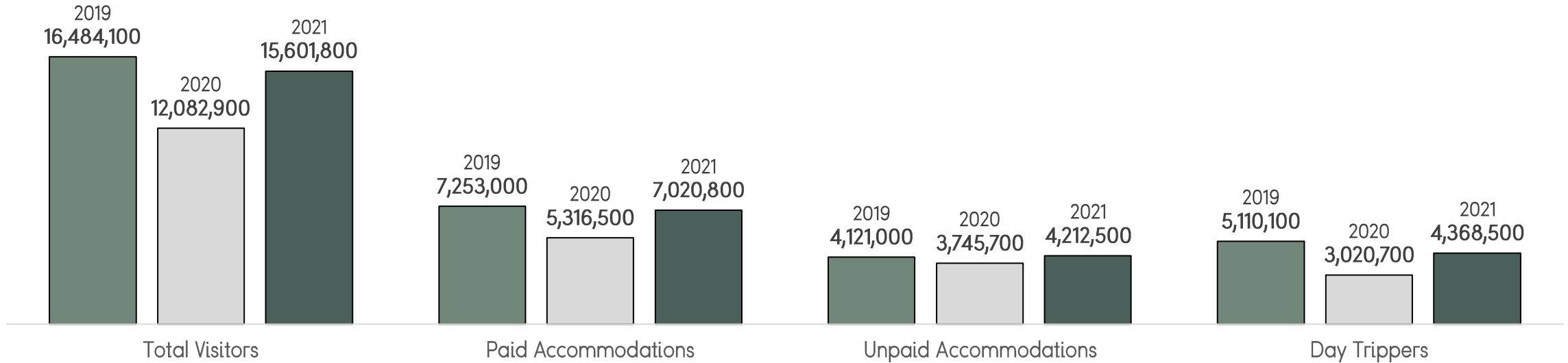
Return on Investment	2019	2020	2021
Visitors per job supported	145	111*	124*
Tax savings per household	\$1,810	\$1,330	\$2,050

\*2020 and 2021 figures have been updated due to revised IMPLAN models.

# LODGING METRICS

Lodging Metrics	2019	2020	2021	Δ% from '19	Δ% from '20
Occupancy Rate (%)	47.4%	36.1%	49.4%	+ 4.2%	+ 36.8%
Average Daily Rate	\$142.42	\$127.82	\$146.32	+ 2.7%	+ 14.5%
RevPAR	\$67.51	\$46.14	\$72.28	+ 7.1%	+ 56.7%
Total Lodging Revenue	\$1,489,008,000	\$964,035,600	\$1,874,899,800	+ 25.9%	+ 94.5%

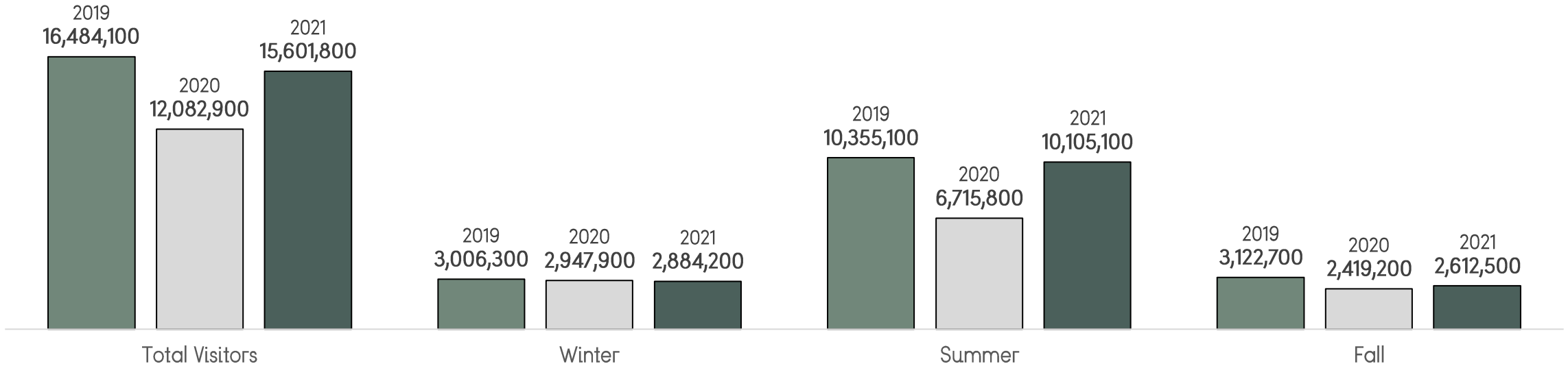
# VISITOR TYPE



Visitor Type	2019	2020	2021	Δ% from '19	Δ% from '20
Paid Accommodations	7,253,000	5,316,500	7,020,800	- 3.2%	+ 32.1%
Unpaid Accommodations	4,121,000	3,745,700	4,212,500	+ 2.2%	+ 12.5%
Day Trippers	5,110,100	3,020,700	4,368,500	- 14.5%	+ 44.6%
<b>Total Visitors</b>	<b>16,484,100</b>	<b>12,082,900</b>	<b>15,601,800</b>	<b>- 5.4%</b>	<b>+ 29.1%</b>

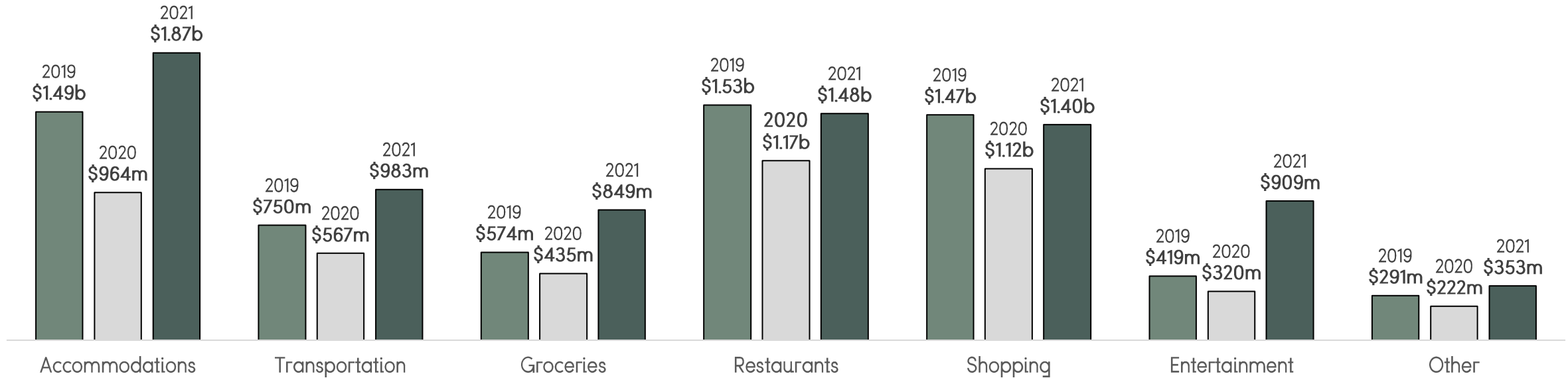


# VISITORS BY SEASON



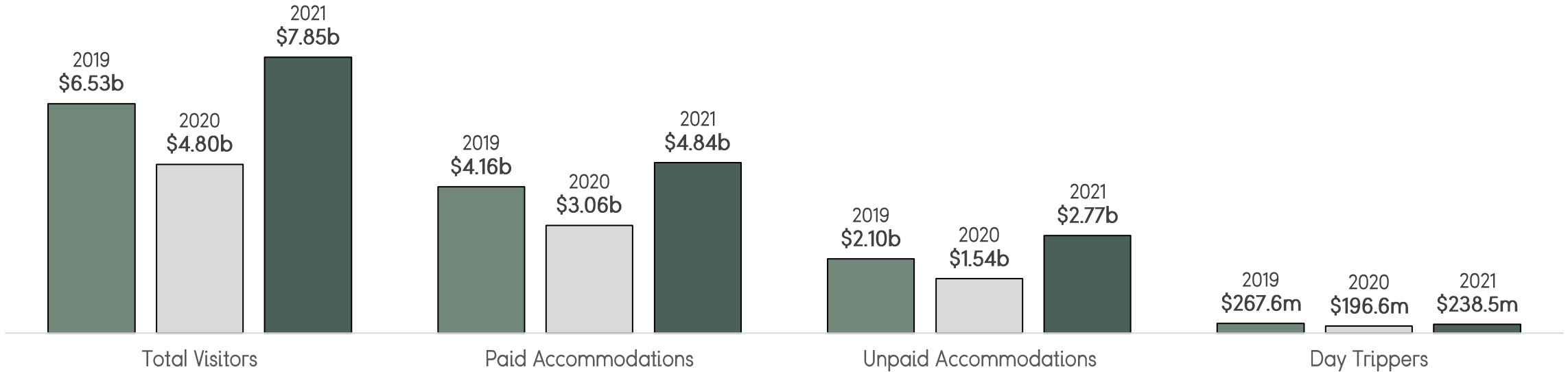
Season	2019	2020	2021	Δ% from '19	Δ% from '20
Winter	3,006,300	2,947,900	2,884,200	- 4.1%	- 2.2%
Summer	10,355,100	6,715,800	10,105,100	- 2.4%	+ 50.5%
Fall	3,122,700	2,419,200	2,612,500	- 16.3%	+ 8.0%
Total Visitors	16,484,100	12,082,900	15,601,800	- 5.4%	+ 29.1%

# DIRECT SPENDING BY CATEGORY



Spending	2019	2020	2021	Δ% from '19	Δ% from '20
Accommodations	\$1,489,940,400	\$964,035,600	\$1,874,899,800	+ 25.8%	+ 94.5%
Transportation	\$749,842,100	\$567,229,500	\$982,932,100	+ 31.1%	+ 73.3%
Groceries	\$574,099,700	\$435,105,600	\$849,218,100	+ 47.9%	+ 95.2%
Restaurants	\$1,534,731,600	\$1,169,936,800	\$1,479,077,500	- 3.6%	+ 26.4%
Shopping	\$1,468,833,900	\$1,118,747,200	\$1,404,976,300	- 4.3%	+ 25.6%
Entertainment	\$418,845,400	\$319,738,000	\$908,595,300	+ 116.9%	+ 184.2%
Other	\$291,395,300	\$221,554,900	\$353,395,600	+ 21.3%	+ 59.5%
<b>Total Spending</b>	<b>\$6,527,688,400</b>	<b>\$4,796,347,600</b>	<b>\$7,853,094,700</b>	<b>+ 20.3%</b>	<b>+ 63.7%</b>

# DIRECT SPENDING BY VISITOR TYPE



Visitor Type	2019	2020	2021	Δ% from '19	Δ% from '20
Paid Accommodations	\$4,158,137,600	\$3,055,077,900	\$4,840,069,000	+ 16.4%	+ 58.4%
Unpaid Accommodations	\$2,101,915,700	\$1,544,325,100	\$2,774,505,700	+ 32.0%	+ 79.7%
Day Trippers	\$267,635,100	\$196,637,600	\$238,520,000	- 10.9%	+ 21.3%
<b>Total Spending</b>	<b>\$6,527,688,400</b>	<b>\$4,796,040,600</b>	<b>\$7,853,094,700</b>	<b>+ 20.3%</b>	<b>+ 63.7%</b>



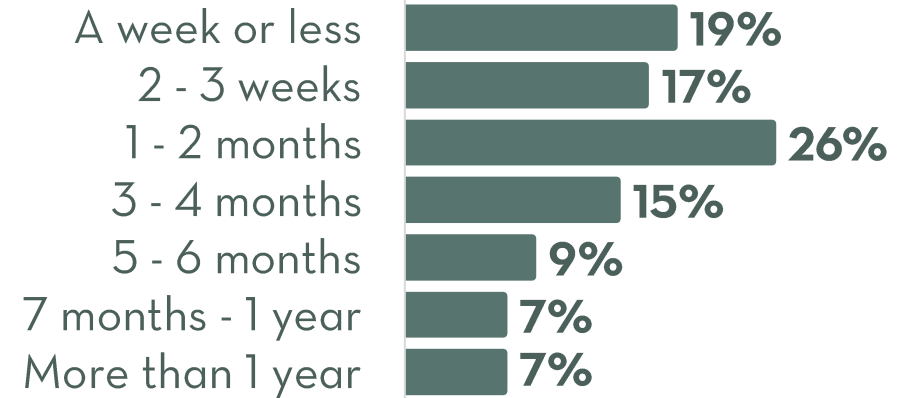
# TRIP PLANNING CYCLE : PRE-VISIT



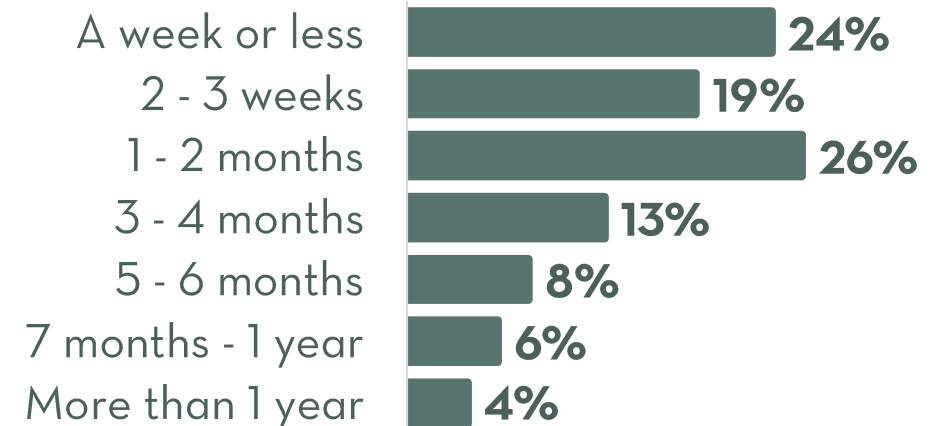
# TRIP PLANNING CYCLE

- » Typical visitors began planning their trip **46 days** in advance
- » **64%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **38 days** in advance
- » **7 in 10** visitors have a booking window of less than 3 months

## Beginning of Trip Planning Cycle

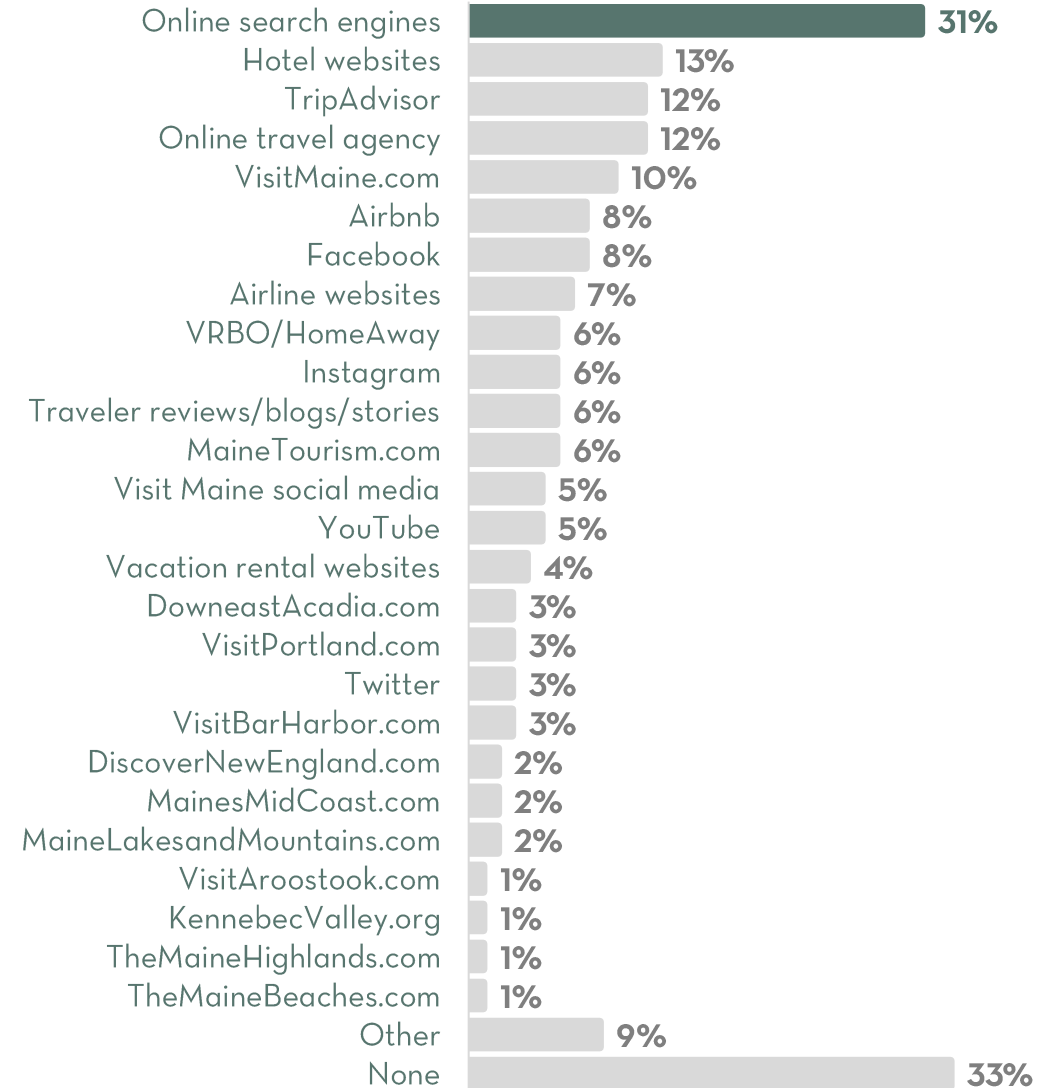


## Booked Accommodations/Made Trip Decisions



# ONLINE TRIP PLANNING SOURCES\*

- » **2 in 3** visitors used one or more online resources to help them plan their trip in Maine
- » **3 in 10** visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » **1 in 10** visitors used VisitMaine.com, and **6%** used MaineTourism.com

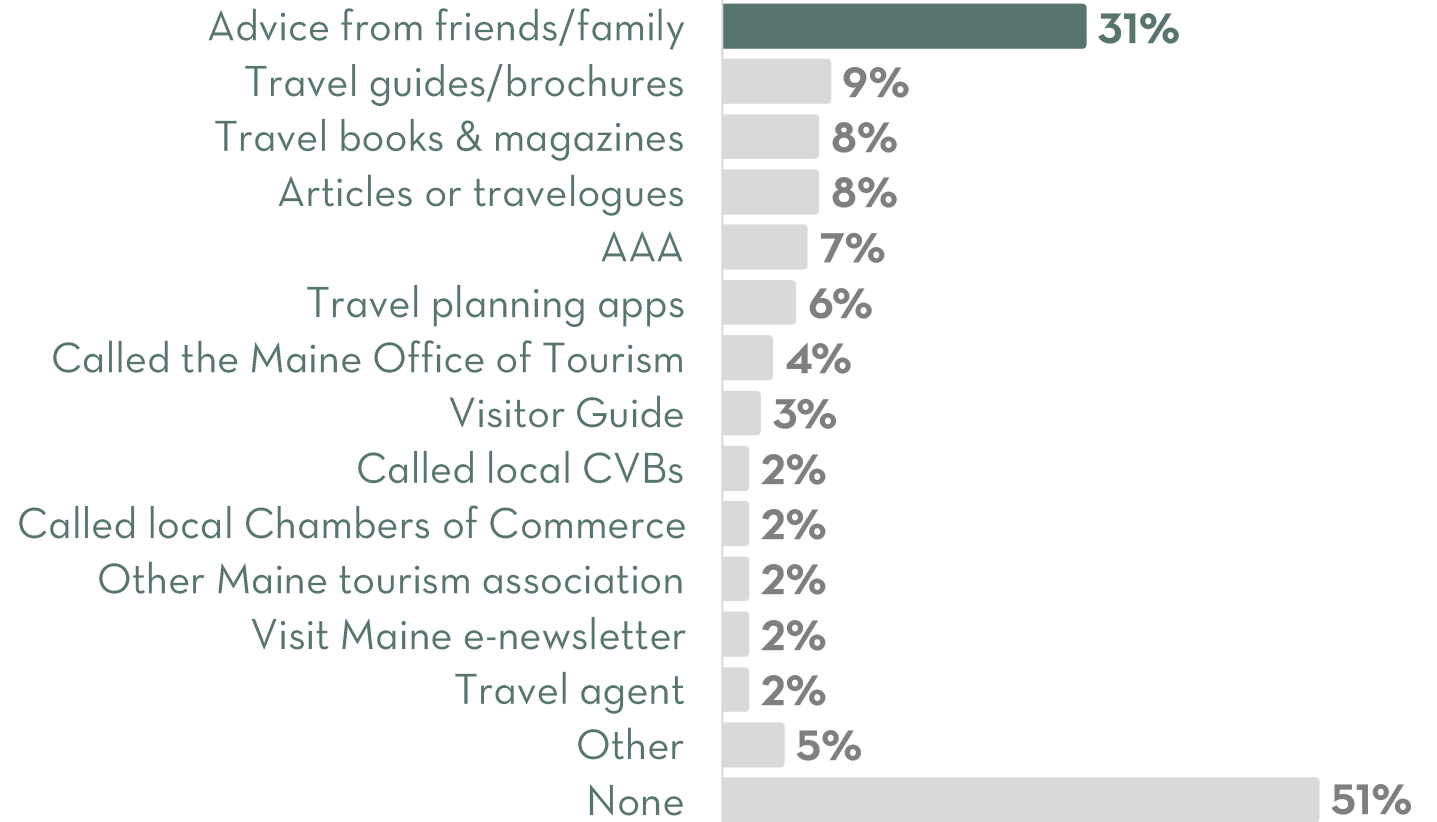


\*Multiple responses permitted.



# OTHER TRIP PLANNING SOURCES\*

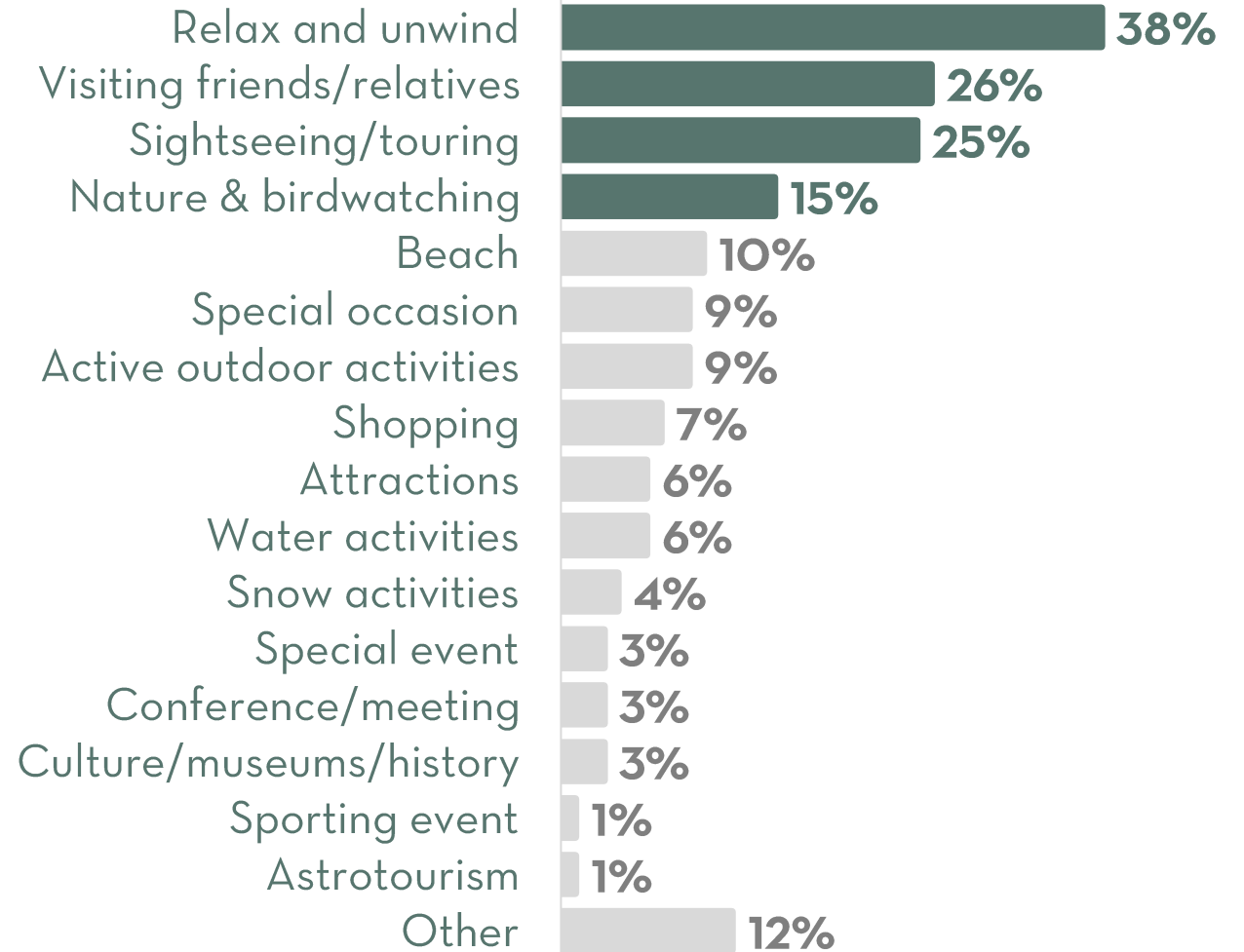
- » **1 in 3** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » **Half** of visitors did not use any other resources to help them plan their trip in Maine



\*Multiple responses permitted.

# REASONS FOR VISITING\*

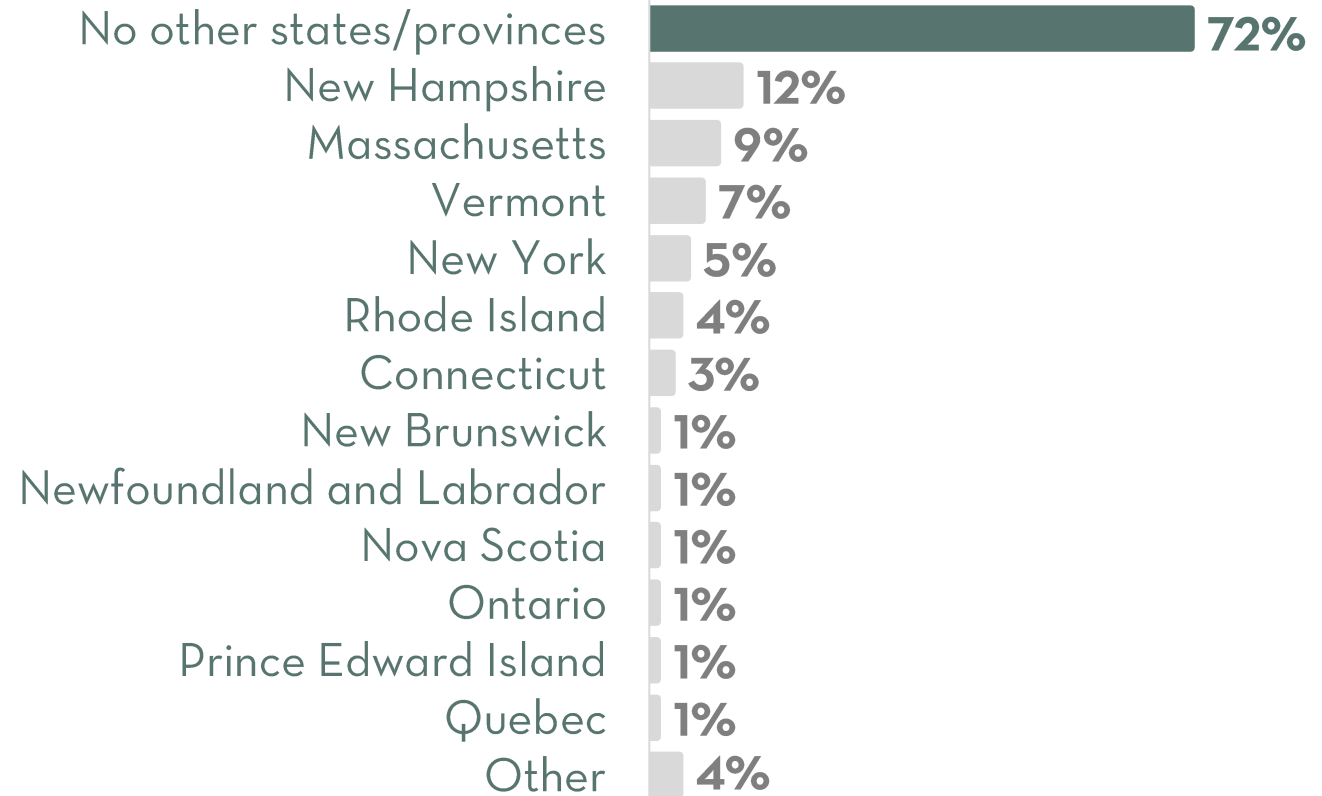
- » **2 in 5** visitors traveled to Maine primarily to relax and unwind
- » **1 in 4** visitors visited Maine to visit friends and relatives or to go sightseeing/touring



\*Multiple responses permitted.

# OTHER STATES & PROVINCES CONSIDERED\*

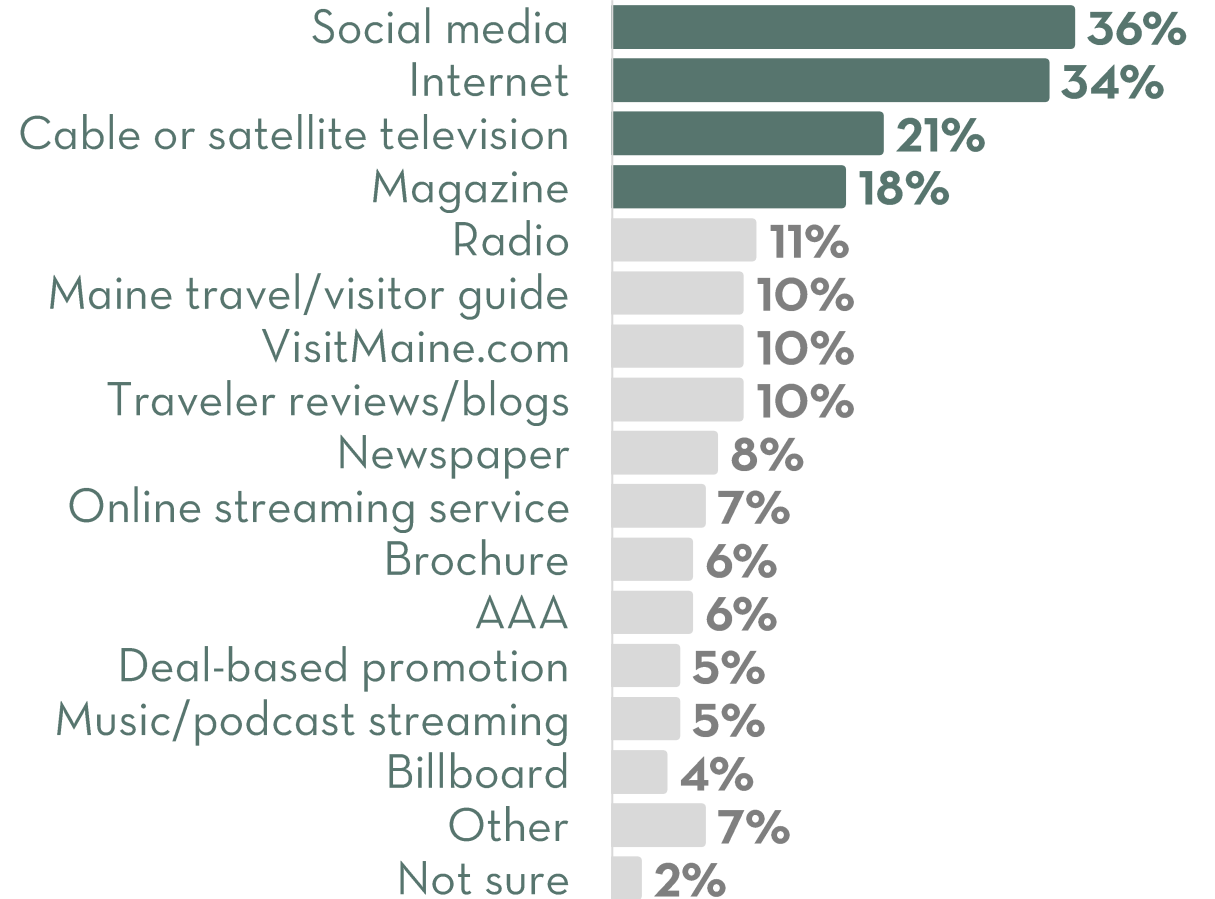
- » **72%** of visitors considered visiting **only** Maine while planning their trips
- » Visitors continued to be **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces





# PRE-TRIP RECALL OF ADVERTISING\*

- » **37%** of 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**

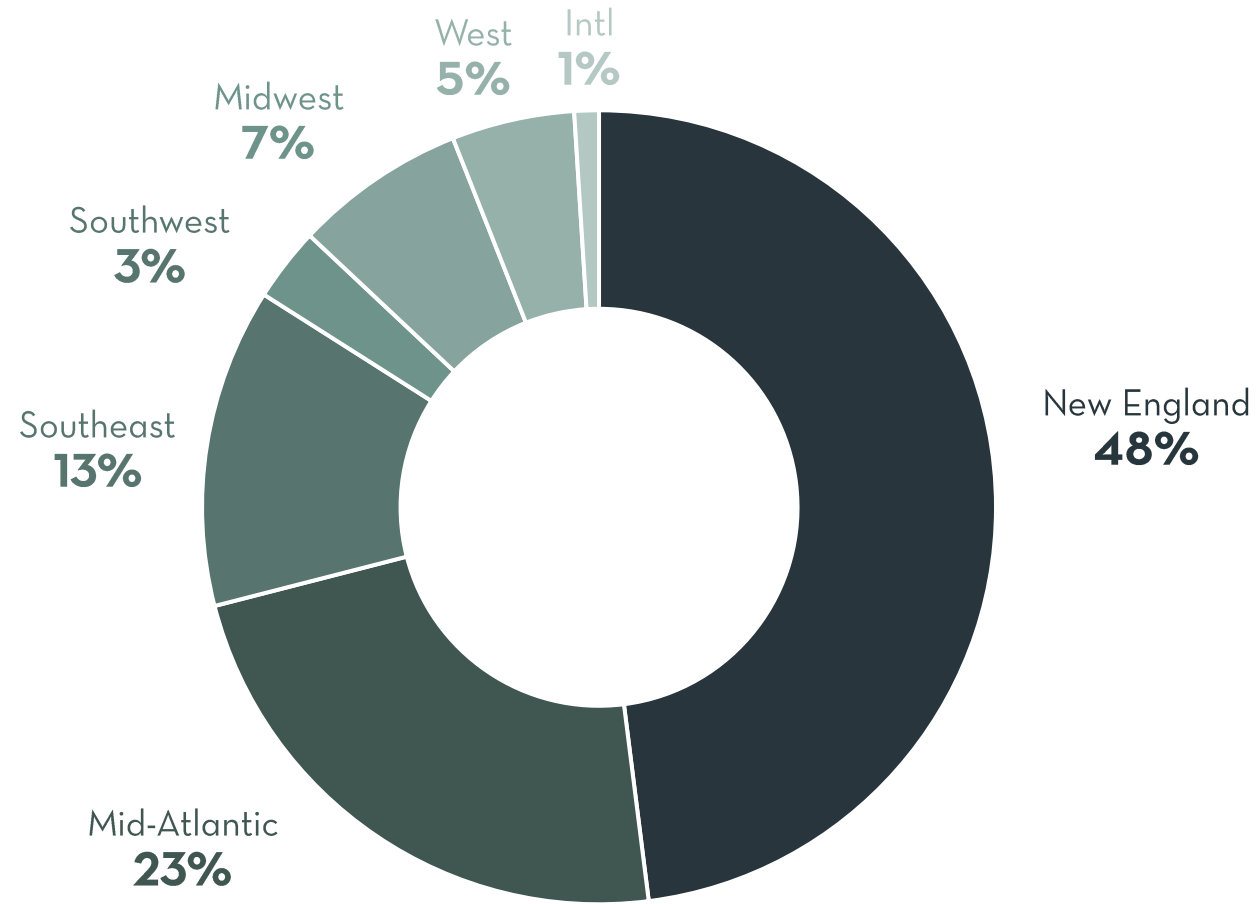


\*Multiple responses permitted.

# TRIP PLANNING CYCLE : TRAVELER PROFILE



# VISITOR ORIGINS





# TOP ORIGIN STATES & PROVINCES

- » **72%** of visitors traveled to/within Maine from 11 U.S. states
- » **1 in 5** visitors were residents of Maine traveling throughout the state

State	Percent
Maine	19%
Massachusetts	13%
New York	10%
New Hampshire	8%
Florida	5%
Connecticut	4%
New Jersey	4%
Virginia	3%
North Carolina	2%
Pennsylvania	2%
Texas	2%

# TOP ORIGIN MARKETS

- » **3 in 10** visitors traveled from **7** U.S. markets
- » **17%** of visitors traveled to Maine from New York City or Boston

Market	Percent
New York City <sup>1</sup>	10%
Boston	7%
Washington D.C. - Baltimore <sup>2</sup>	4%
Atlanta	2%
Chicago	2%
Philadelphia	2%
Portland	2%

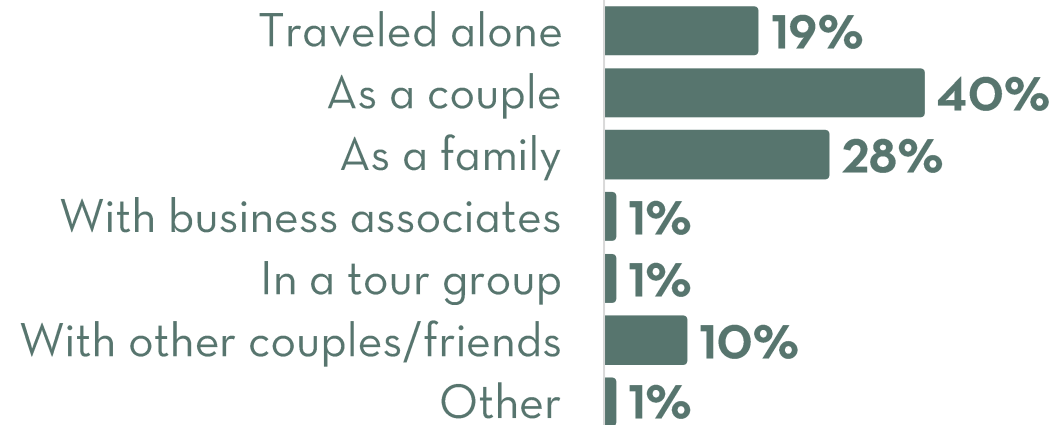
<sup>1</sup>Includes some markets in New Jersey, Pennsylvania, and Connecticut.

<sup>2</sup>Includes some markets in Maryland, Virginia, and West Virginia.

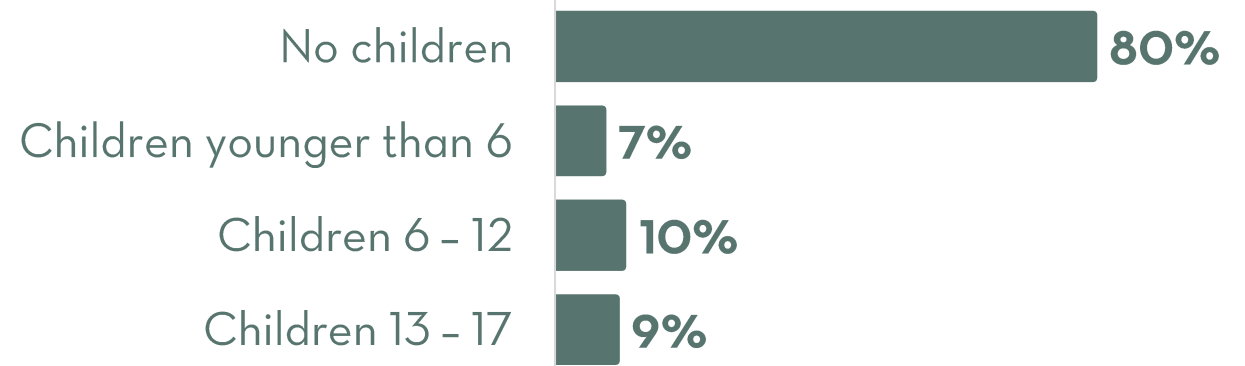
# TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.7** people
- » **2 in 5** visitors traveled as a couple
- » **1 in 5** visitors traveled with one or more children in their travel party

## Travel Party Composition



## Children in Travel Party\*

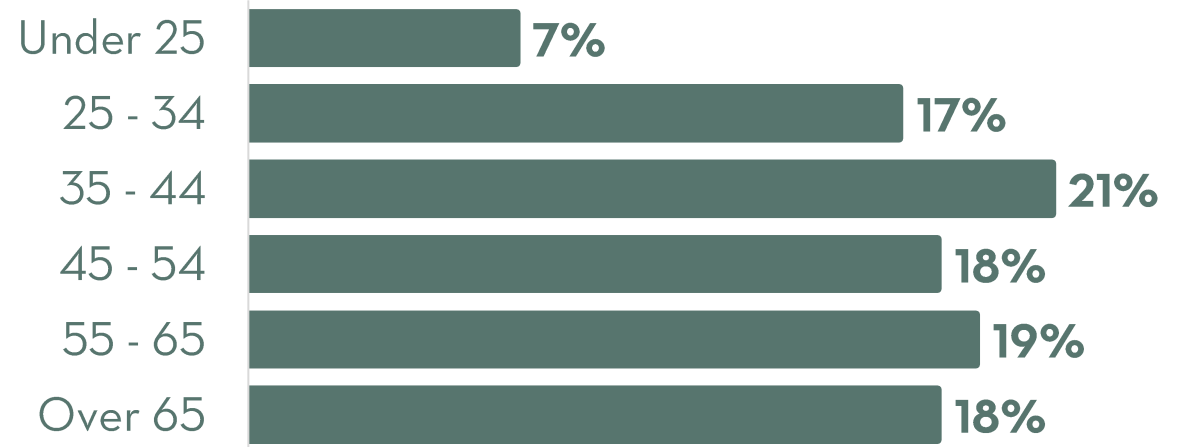


\*Multiple responses permitted.



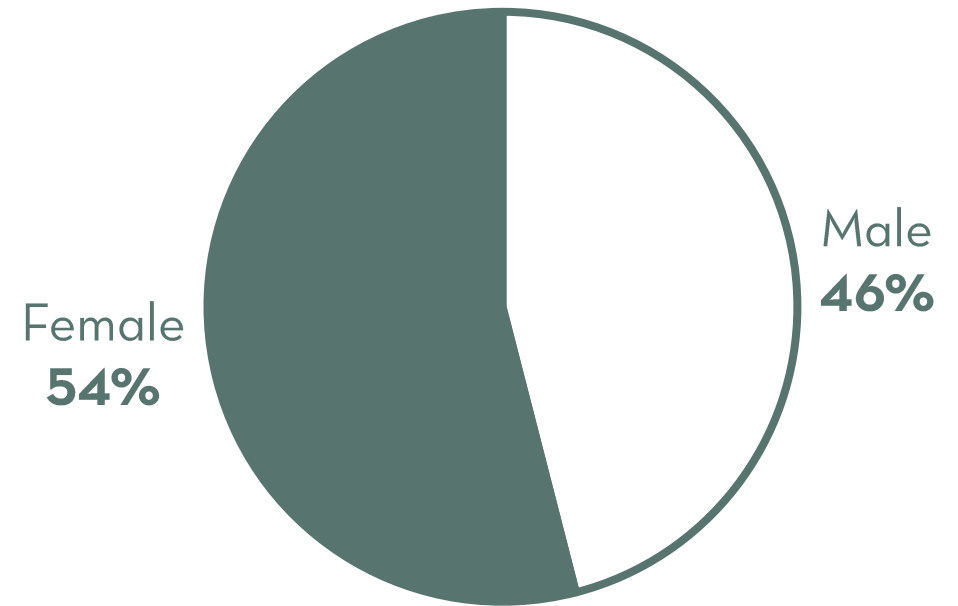
# AGE

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



# GENDER

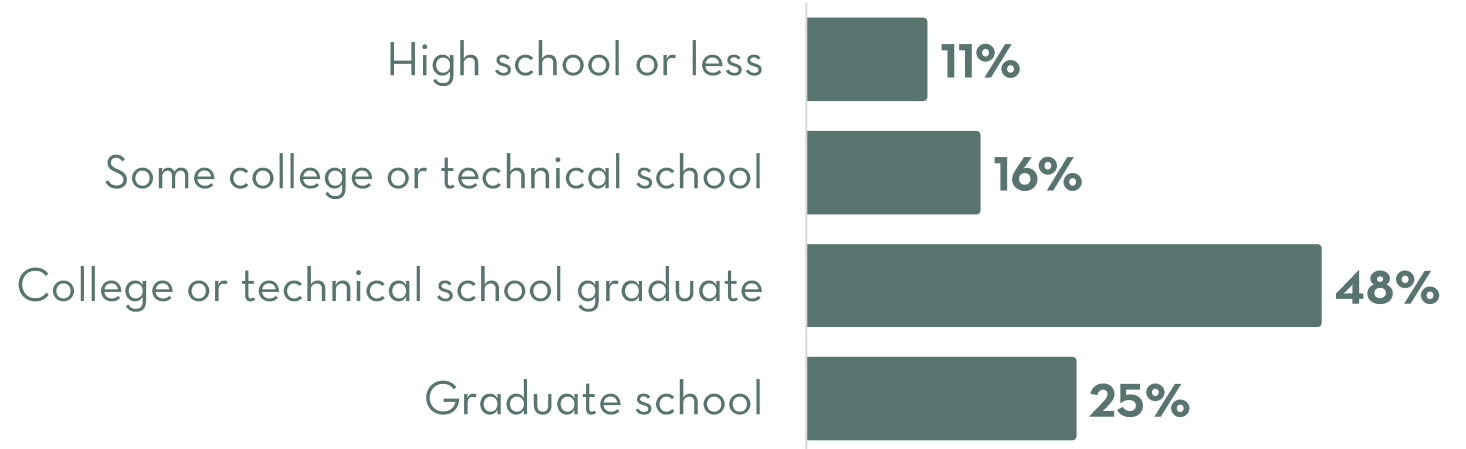
» Visitors to Maine were split nearly **50/50** with slightly more females



\*Of visitors interviewed.

# EDUCATIONAL ATTAINMENT

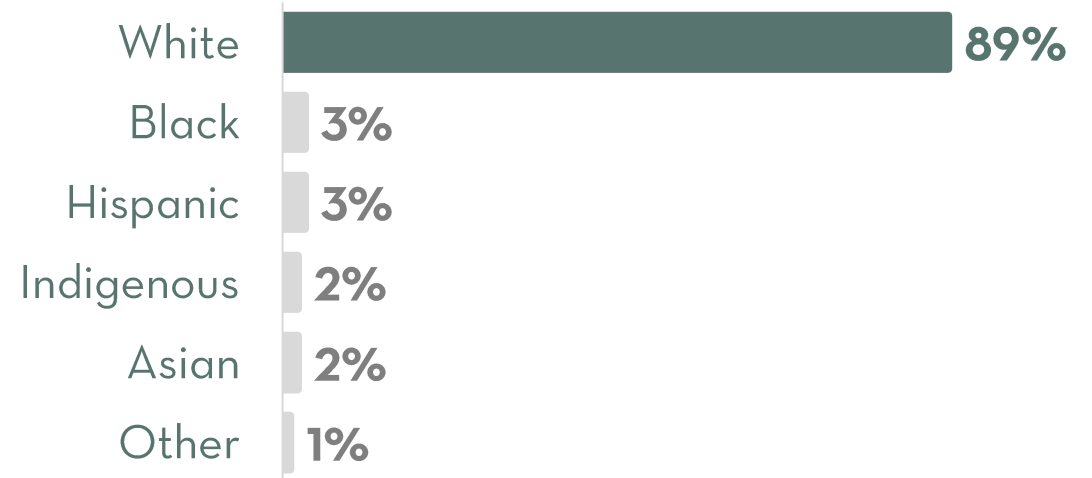
» **3 in 5** visitors have a college/technical school degree or higher





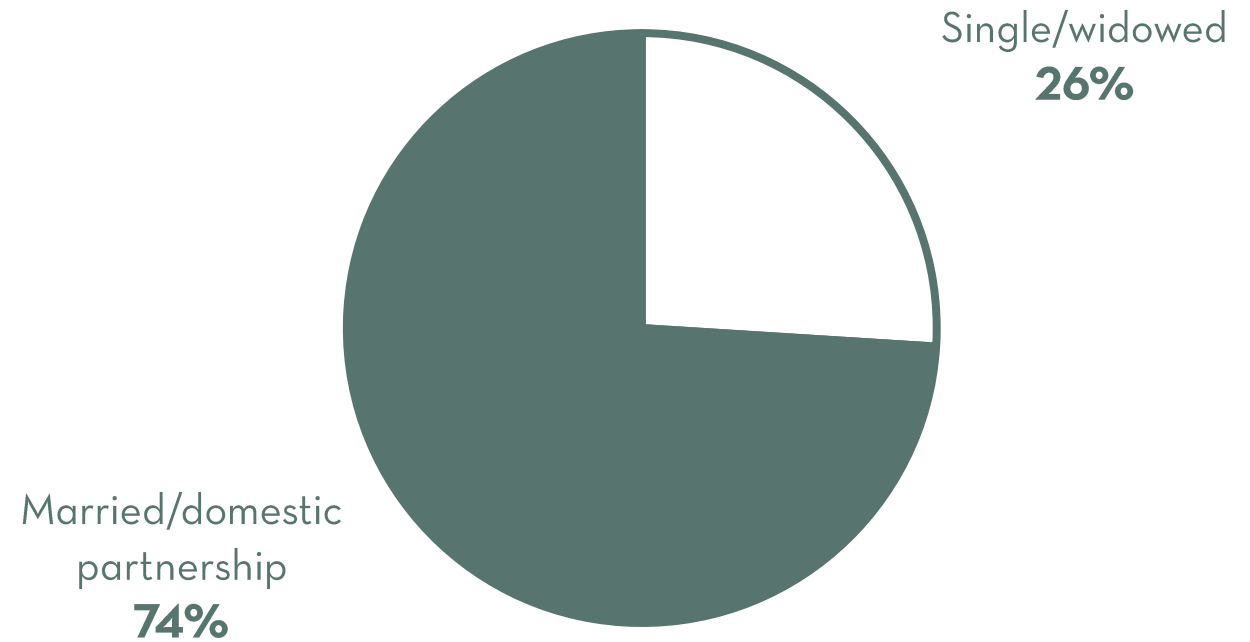
# RACE & ETHNICITY

» **9 in 10** visitors to Maine were White/Caucasian



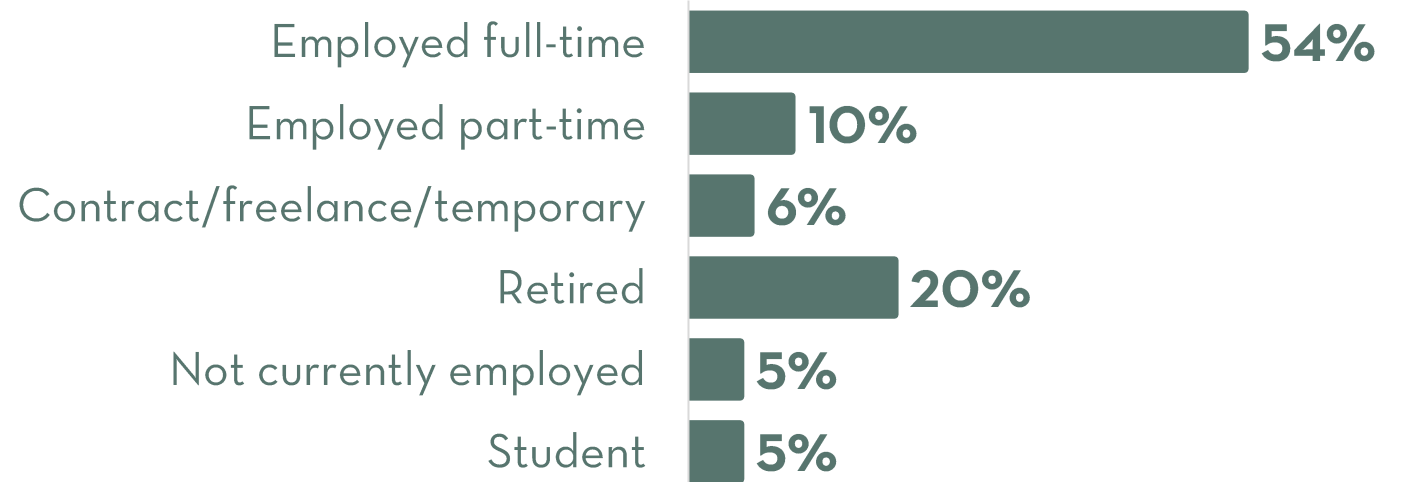
# MARITAL STATUS

» **3 in 4** visitors to Maine were married or living with their partner



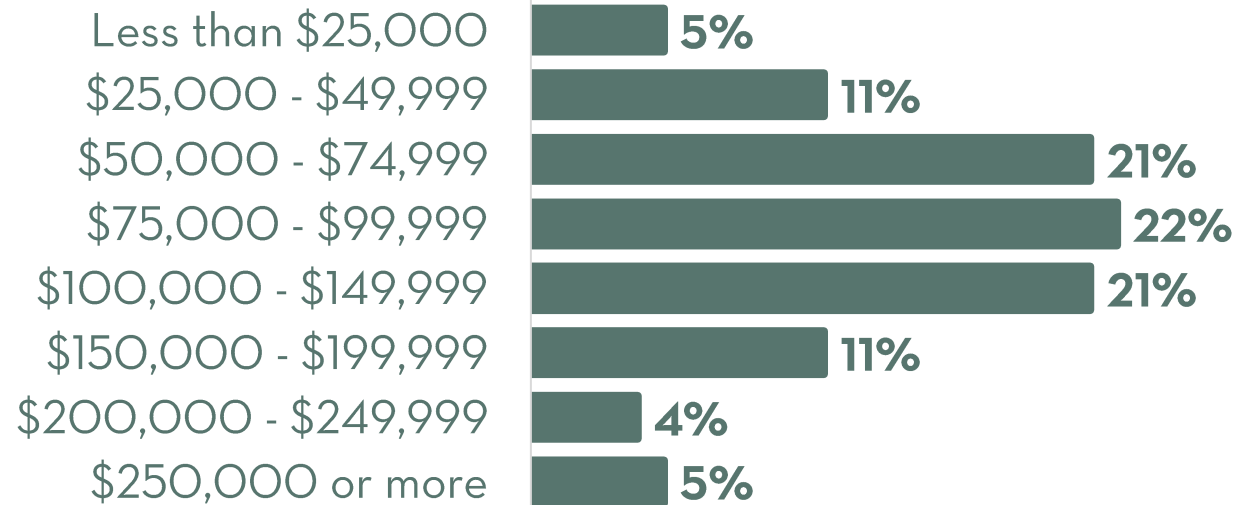
# EMPLOYMENT STATUS

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



# HOUSEHOLD INCOME

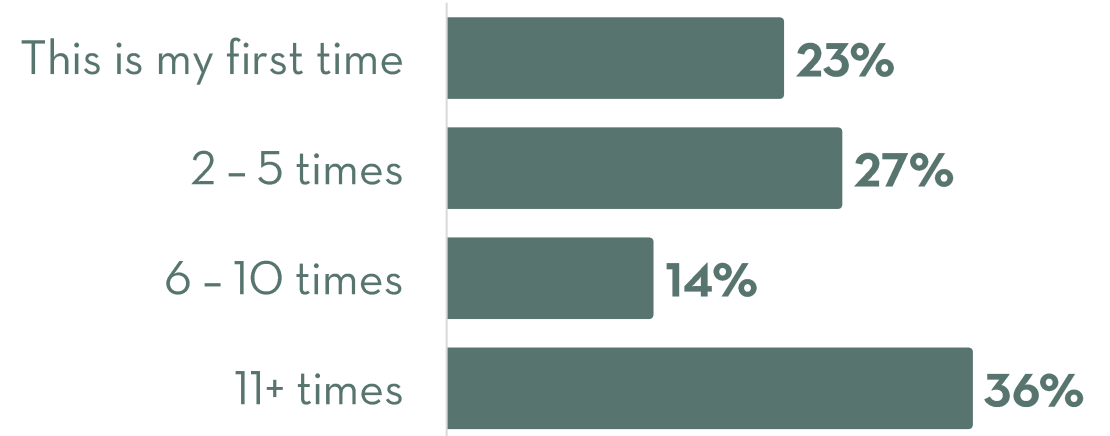
- » The average household income of visitors to Maine is **\$89,800** per year
- » **1 in 10** visitors to Maine earned more than \$200,000 per year





# NEW & RETURNING VISITORS

- » **23%** of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as **36%** had previously traveled in Maine more than 10 times

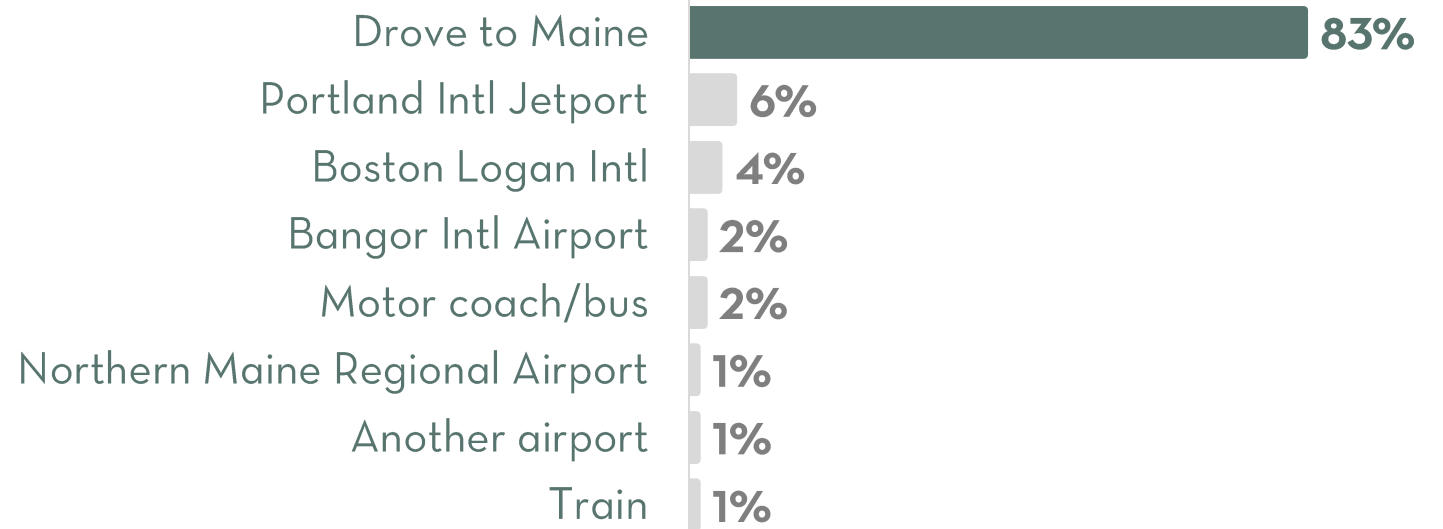


# TRIP PLANNING CYCLE : TRIP EXPERIENCE



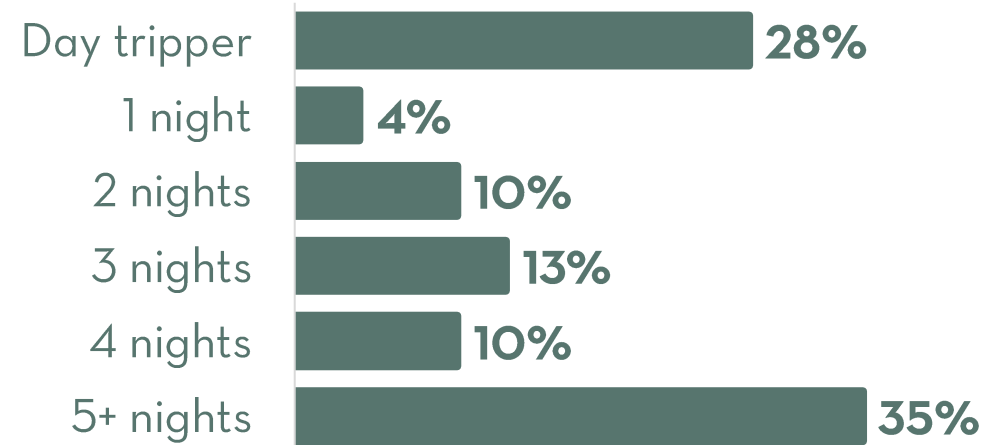
# MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **83%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport or Boston Logan International Airport



# NIGHTS STAYED

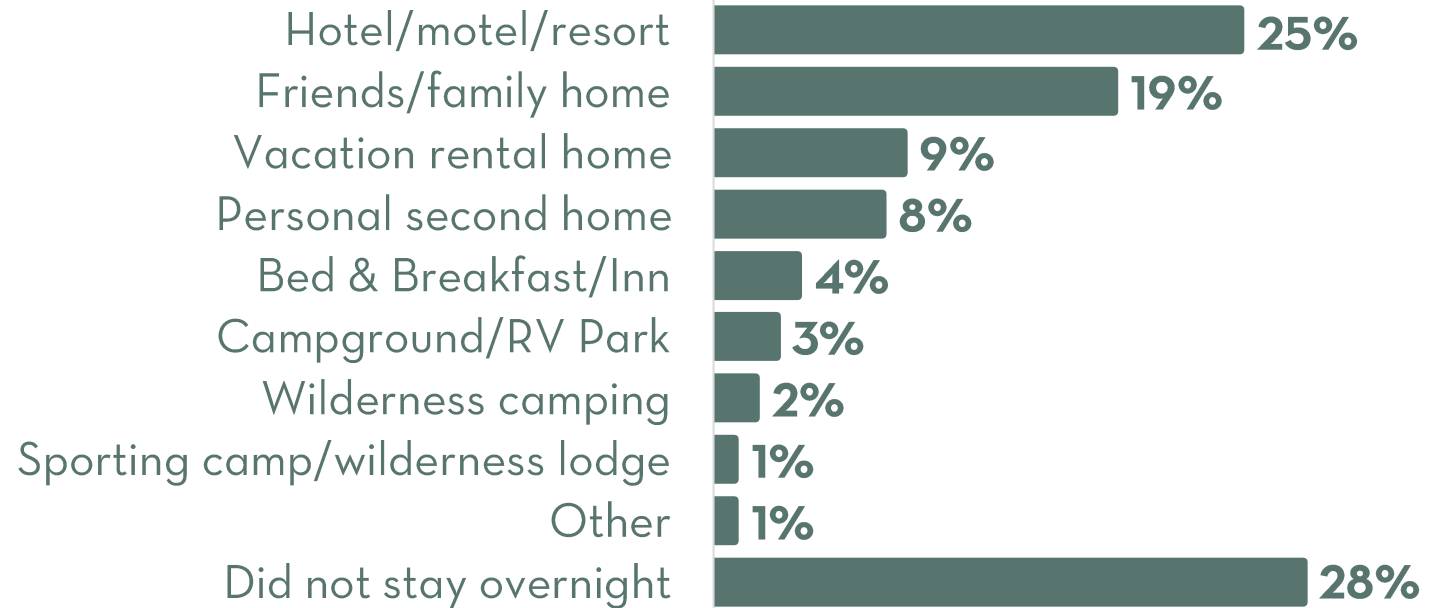
- » **72%** of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed **5.7** nights in Maine on their trips





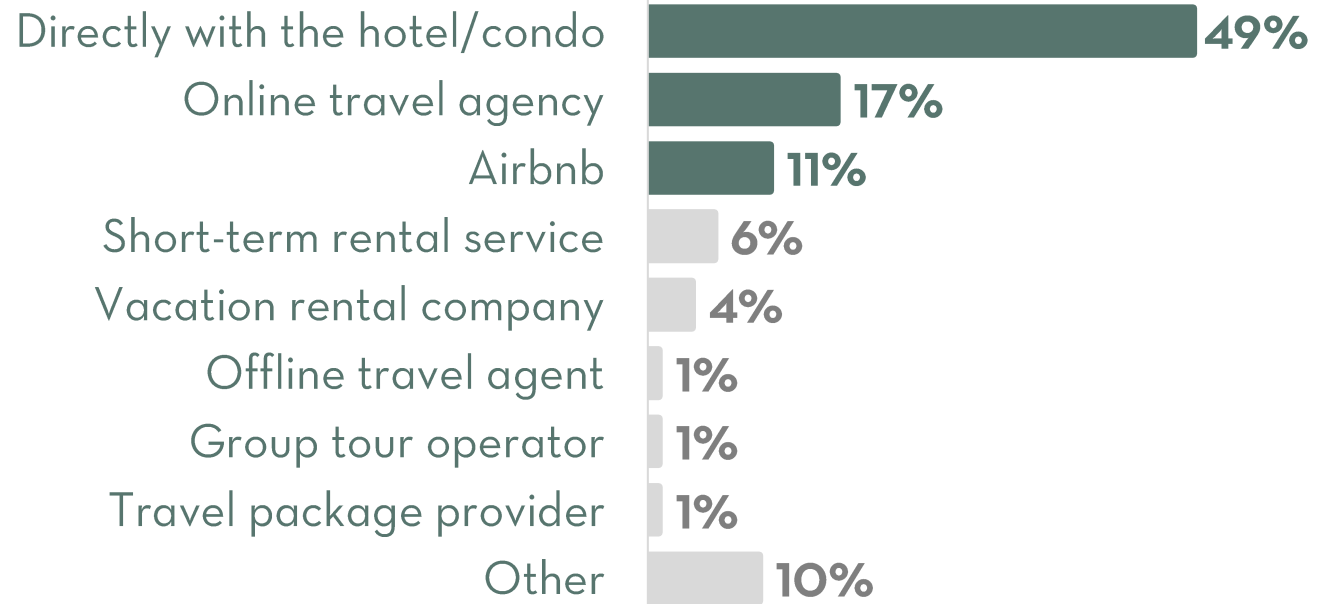
# ACCOMMODATIONS

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



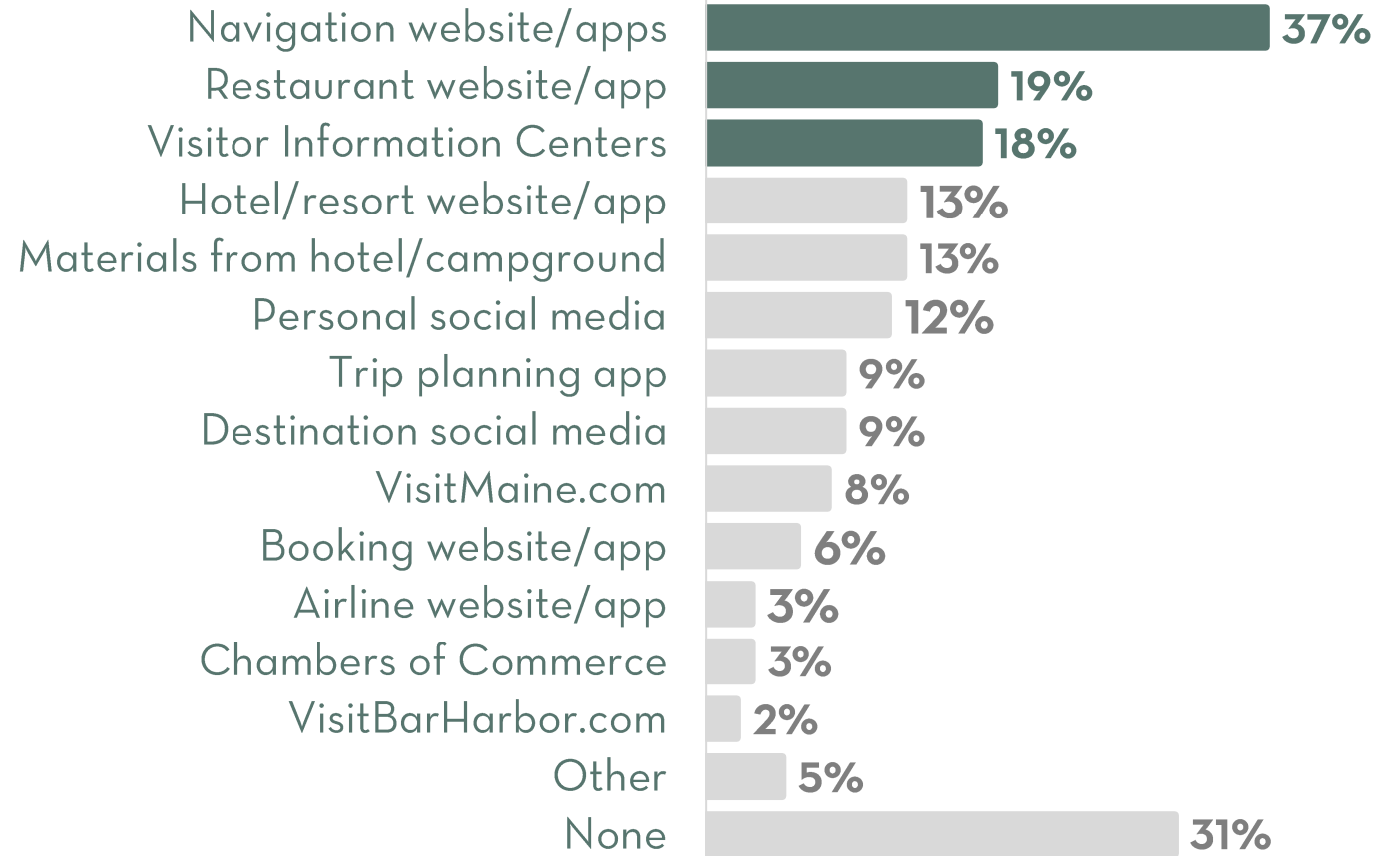
# BOOKING METHODS

» **Half** of visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



# IN-MARKET VISITOR RESOURCES\*

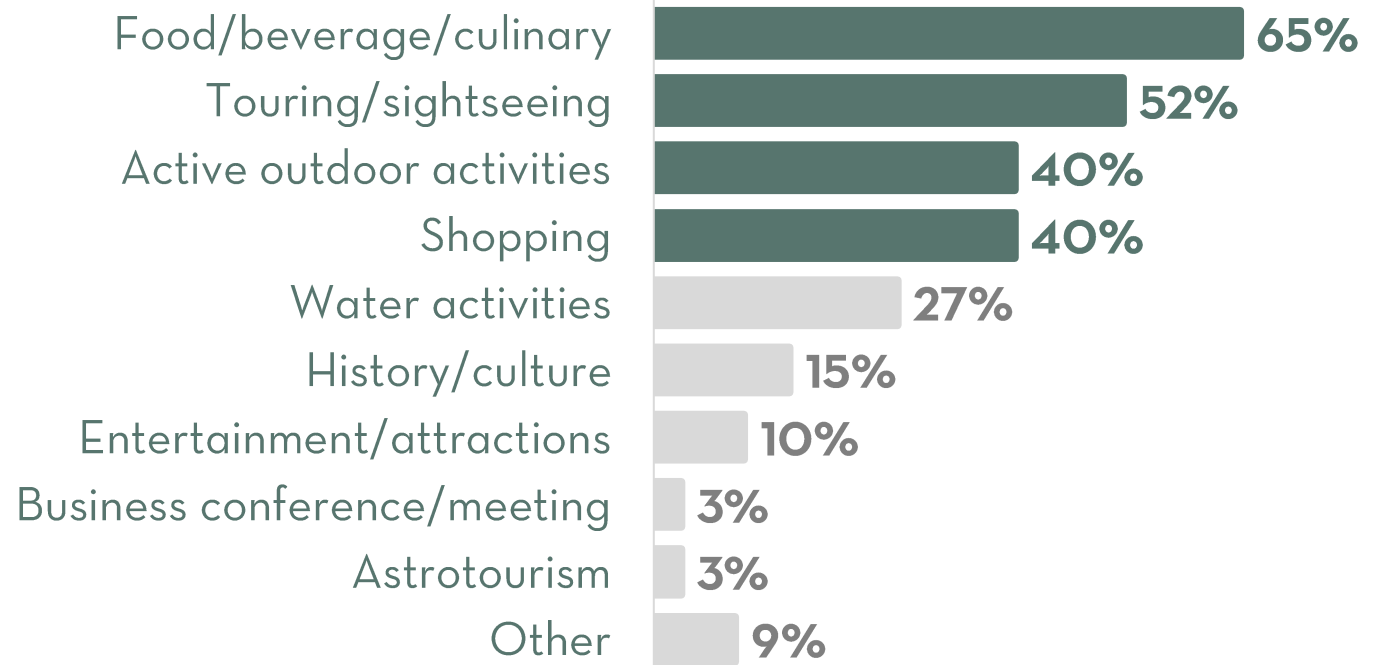
- » Visitors were more likely to rely on **navigation websites/apps** to plan activities in-market
- » **1 in 5** visitors went to a visitor center or used a restaurant website or app
- » **3 in 10** visitors did not use any resources to plan activities while they were in-market



\*Multiple responses permitted.

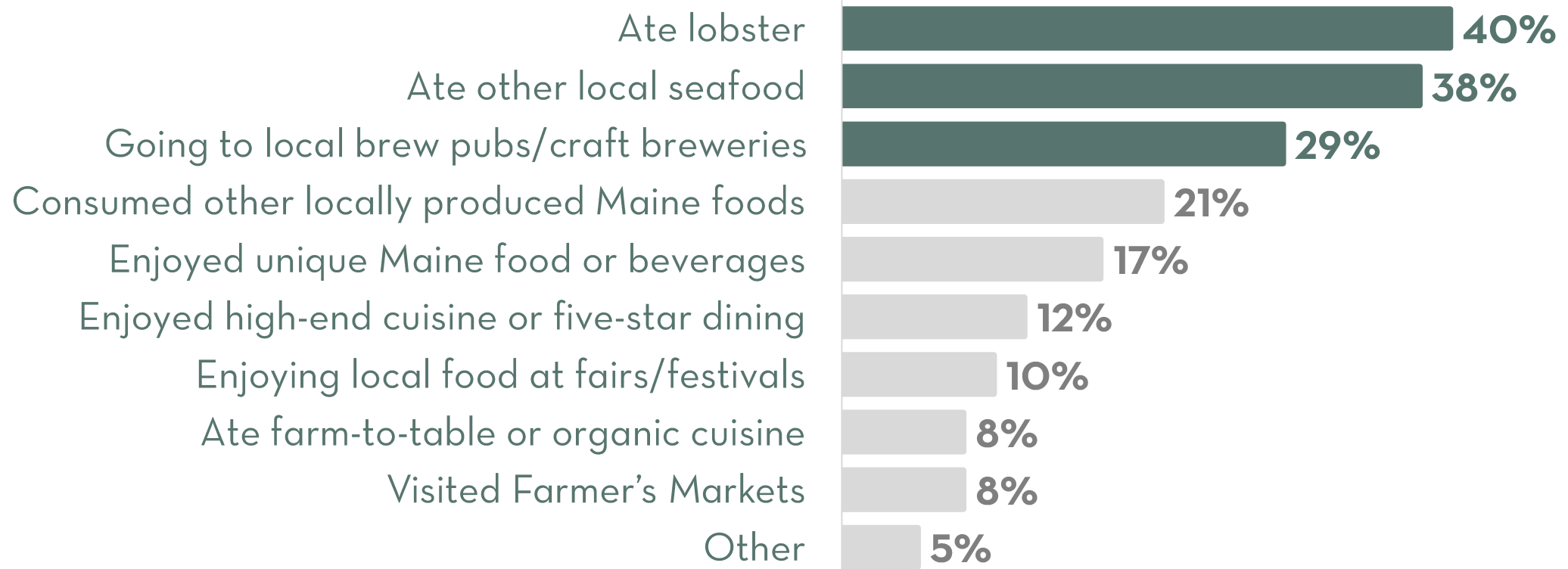
# VISITOR ACTIVITIES\*

- » **65%** of visitors engaged in food/beverage/culinary activities during their trip to Maine
- » **Over half** of visitors went touring/sightseeing during their trip to Maine

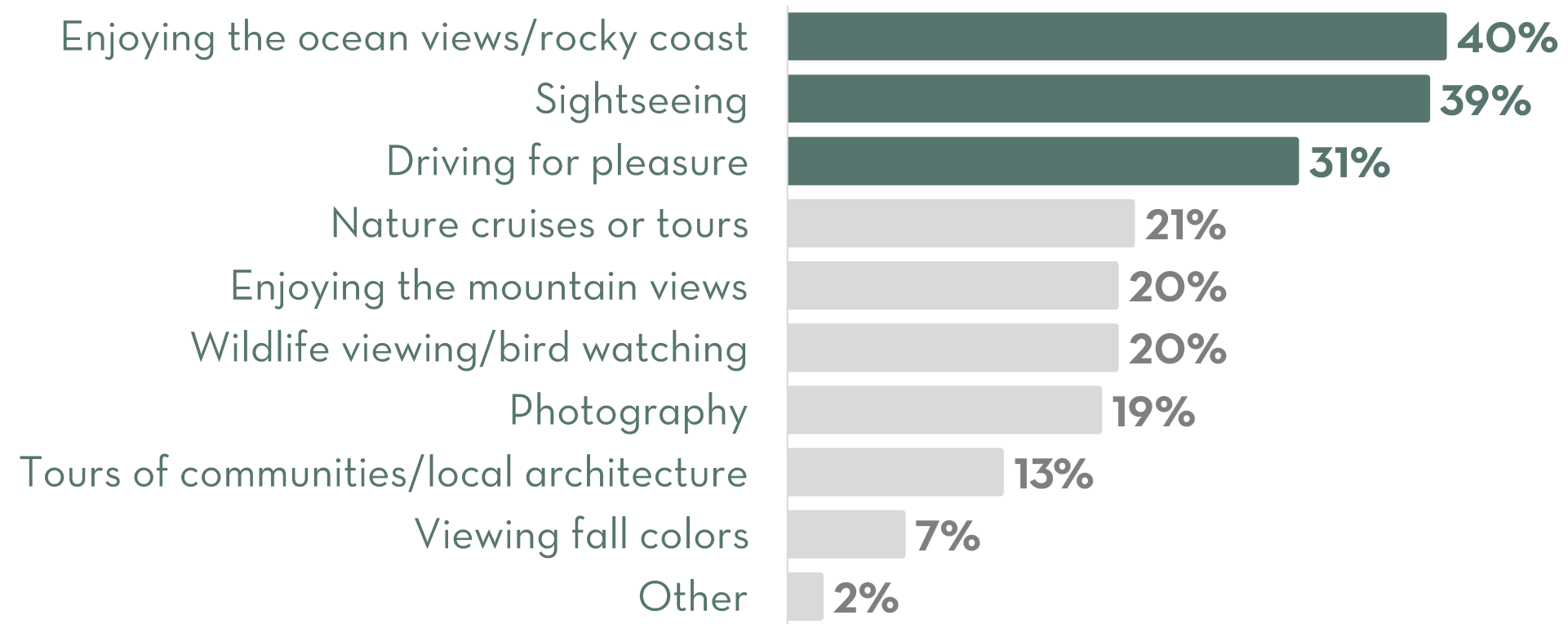




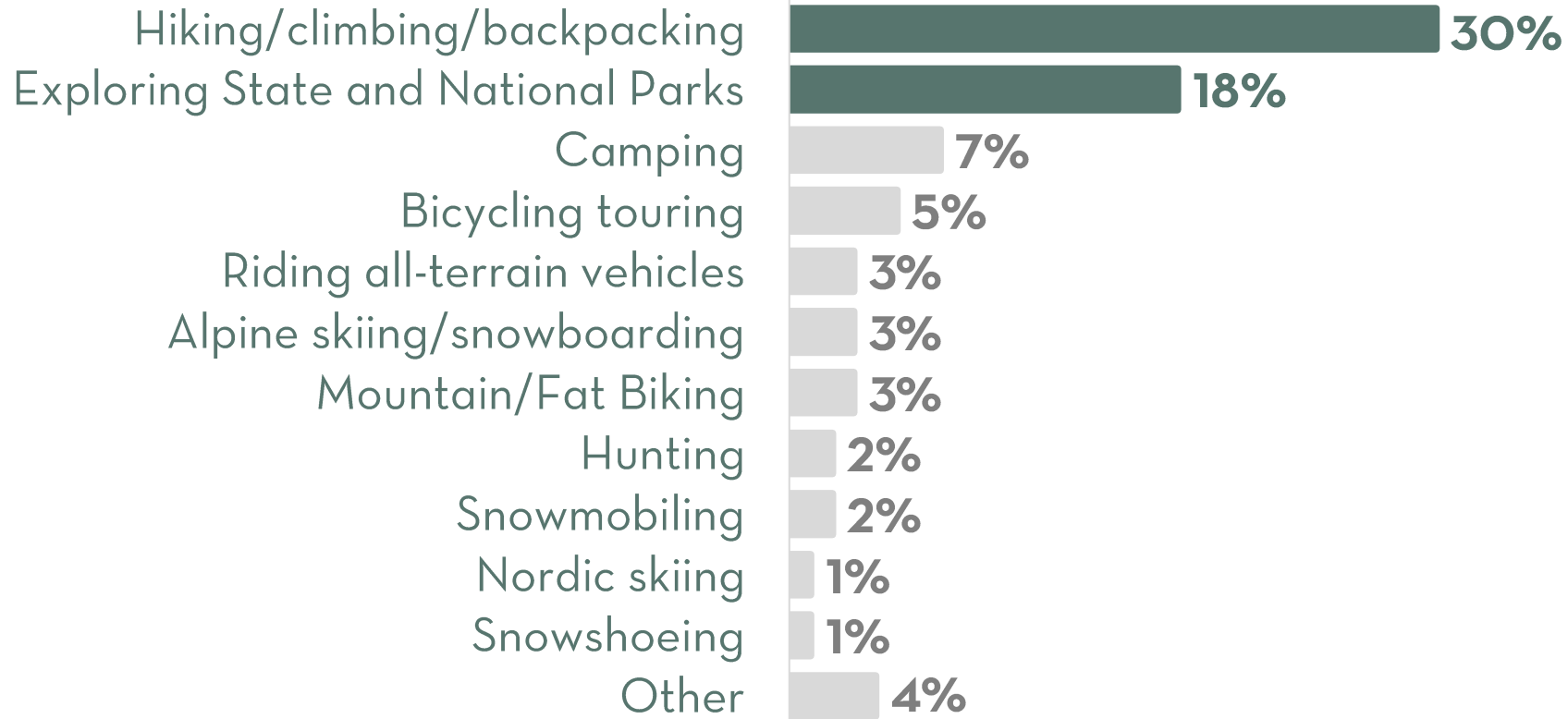
# FOOD & BEVERAGE ACTIVITIES\*



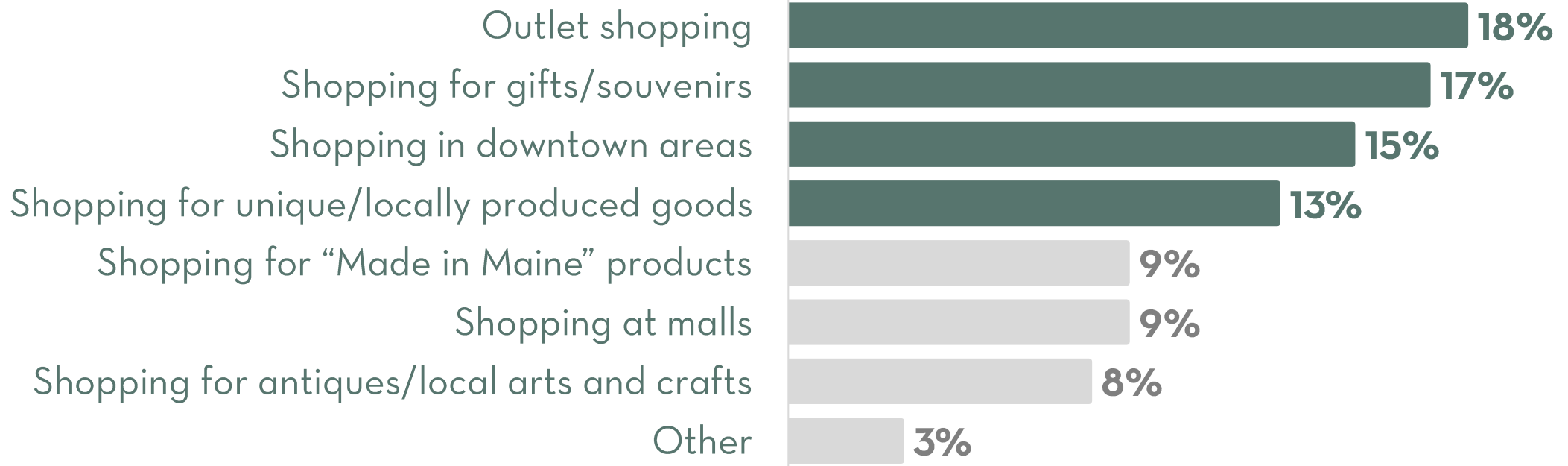
# TOURING & SIGHTSEEING ACTIVITIES\*



# ACTIVE OUTDOOR ACTIVITIES\*

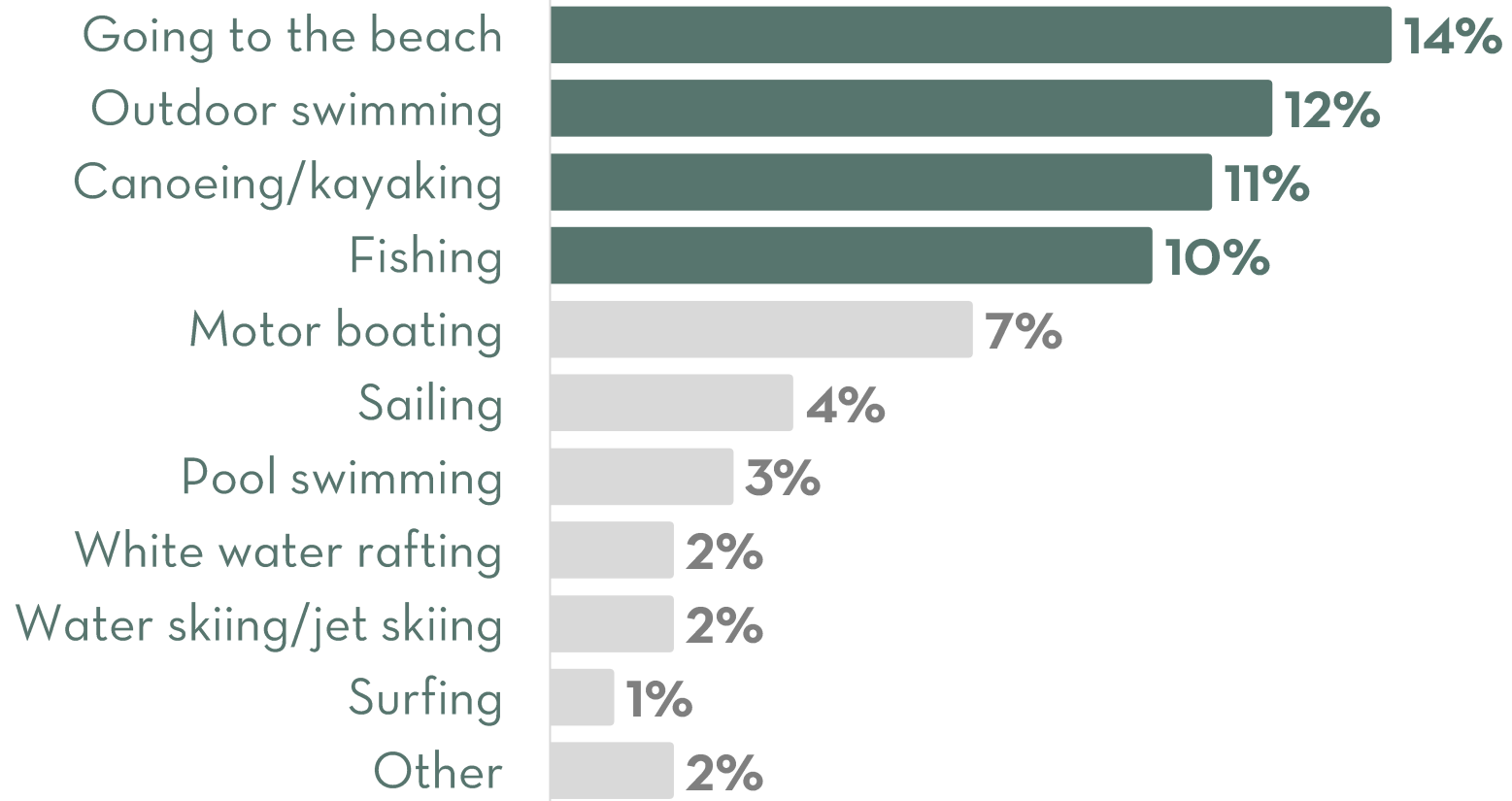


# SHOPPING ACTIVITIES\*

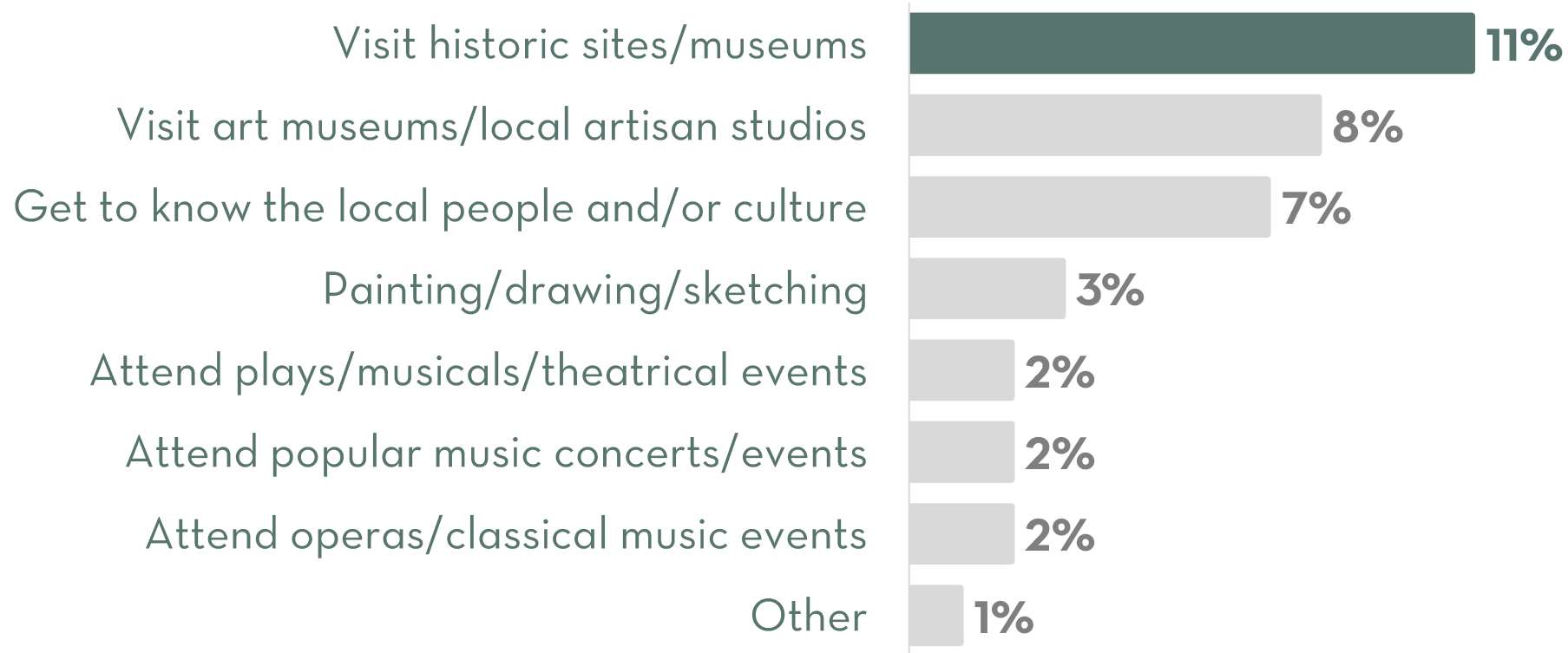




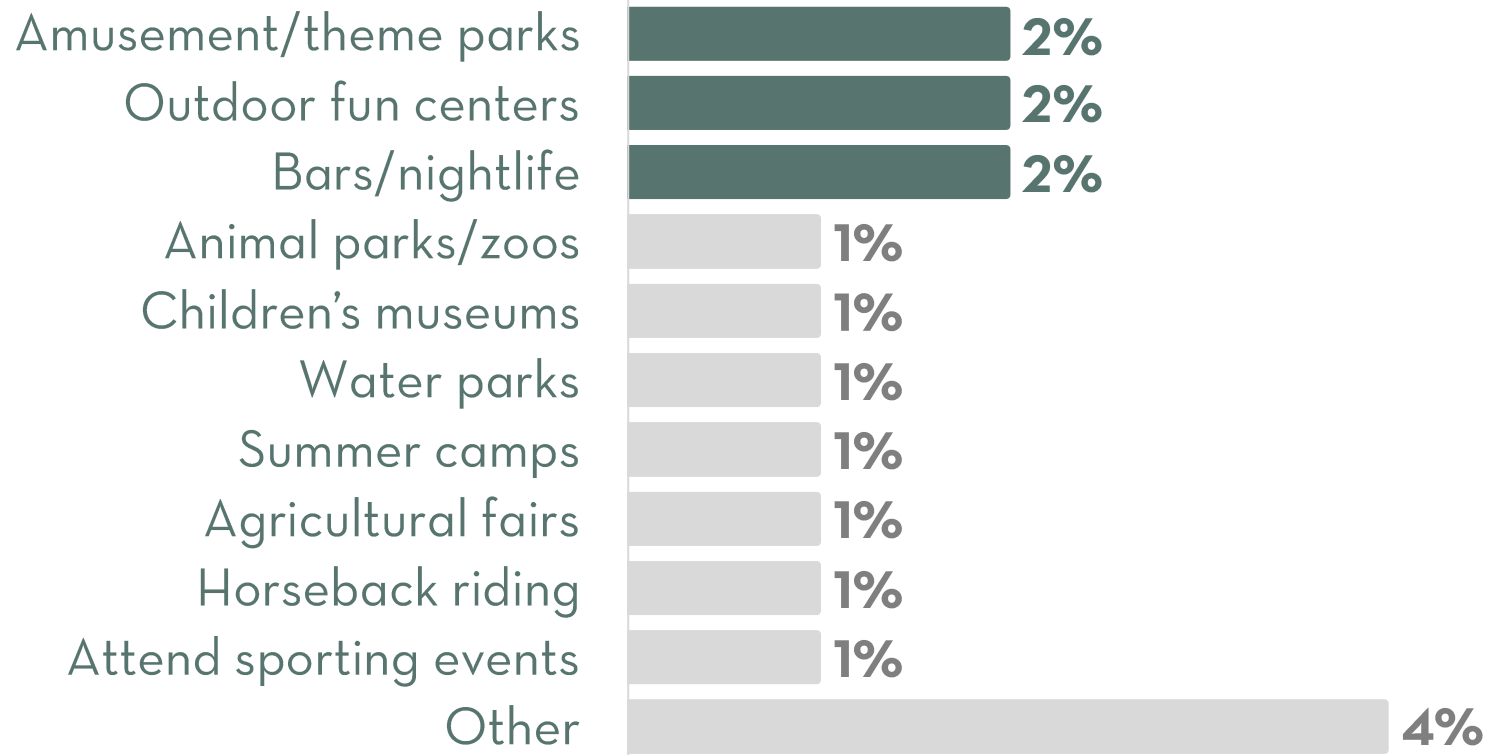
# WATER ACTIVITIES\*



# HISTORICAL & CULTURAL ACTIVITIES\*



# ENTERTAINMENT ACTIVITIES\*



# DAILY TRAVEL PARTY SPENDING

	<b>Paid Lodging</b>	<b>Unpaid Lodging</b>	<b>Day Trippers</b>
Accommodations	\$176	\$0	\$0
Restaurants	\$69	\$61	\$30
Groceries	\$64	\$50	\$20
Shopping	\$118	\$82	\$33
Activities & attractions	\$99	\$82	\$75
Transportation	\$70	\$52	\$23
Other	\$29	\$18	\$14
<b>Daily Spending</b>	<b>\$625</b>	<b>\$345</b>	<b>\$195</b>

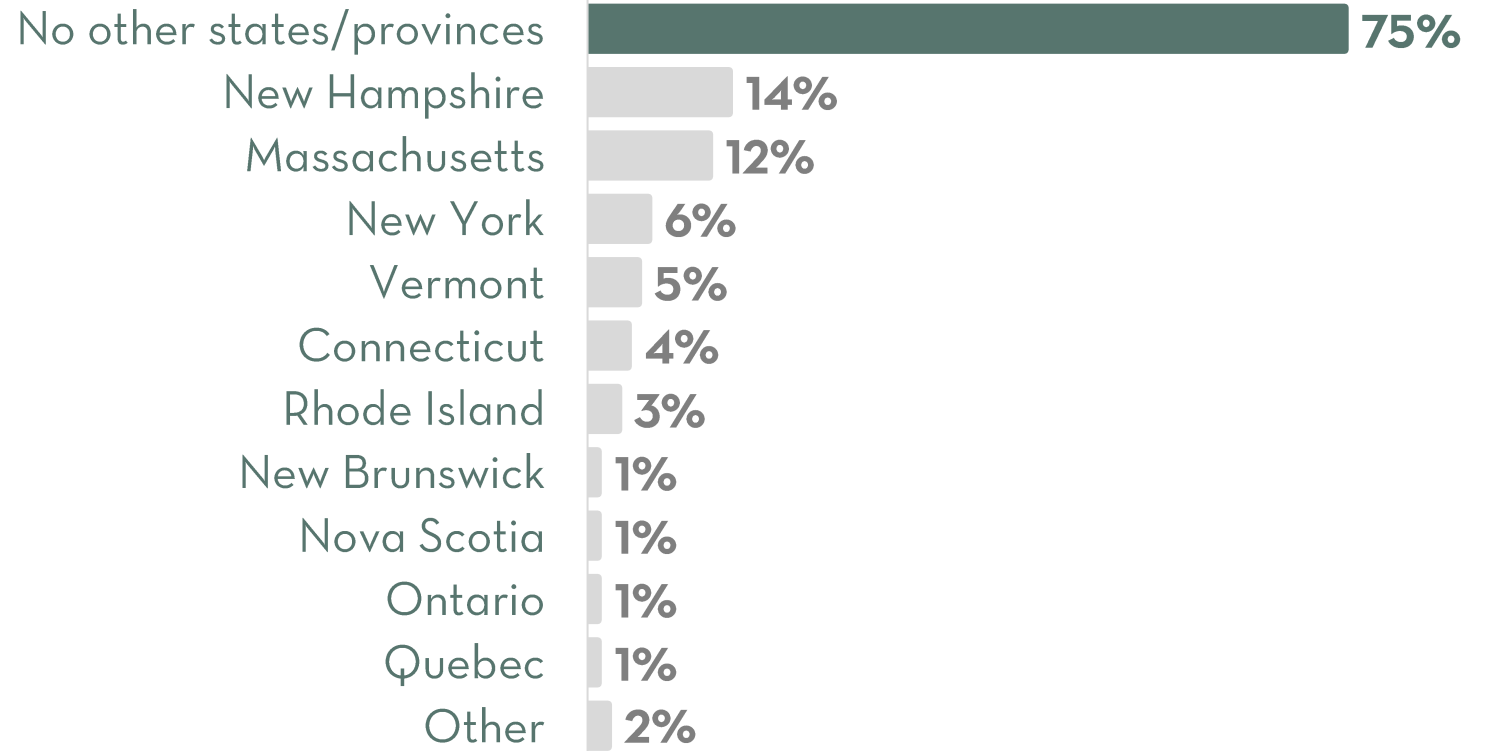


# TOTAL TRAVEL PARTY SPENDING

	<b>Paid Lodging</b>	<b>Unpaid Lodging</b>	<b>Day Trippers</b>
Accommodations	\$825	\$0	\$0
Restaurants	\$298	\$492	\$30
Groceries	\$260	\$401	\$20
Shopping	\$506	\$657	\$33
Activities & attractions	\$432	\$657	\$75
Transportation	\$289	\$421	\$23
Other	\$117	\$146	\$14
<b>Trip Spending</b>	<b>\$2,727</b>	<b>\$2,774</b>	<b>\$195</b>

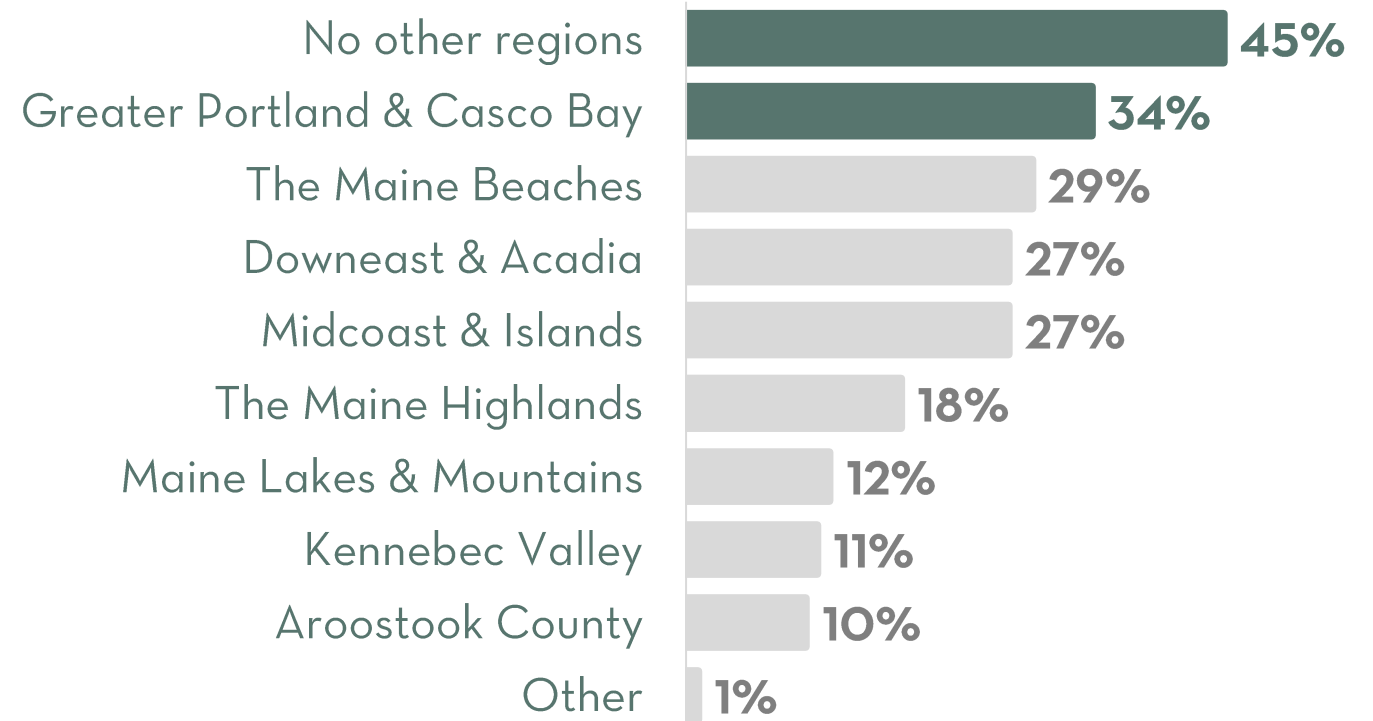
# OTHER STATES & PROVINCES VISITED\*

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

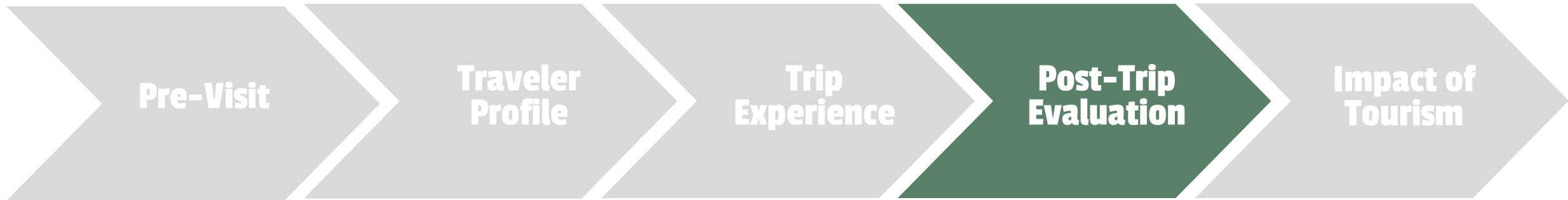


# TRAVELING WITHIN MAINE\*

- » **45%** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state
- » **1 in 3** visitors visited the Greater Portland area in addition to their primary destinations within Maine



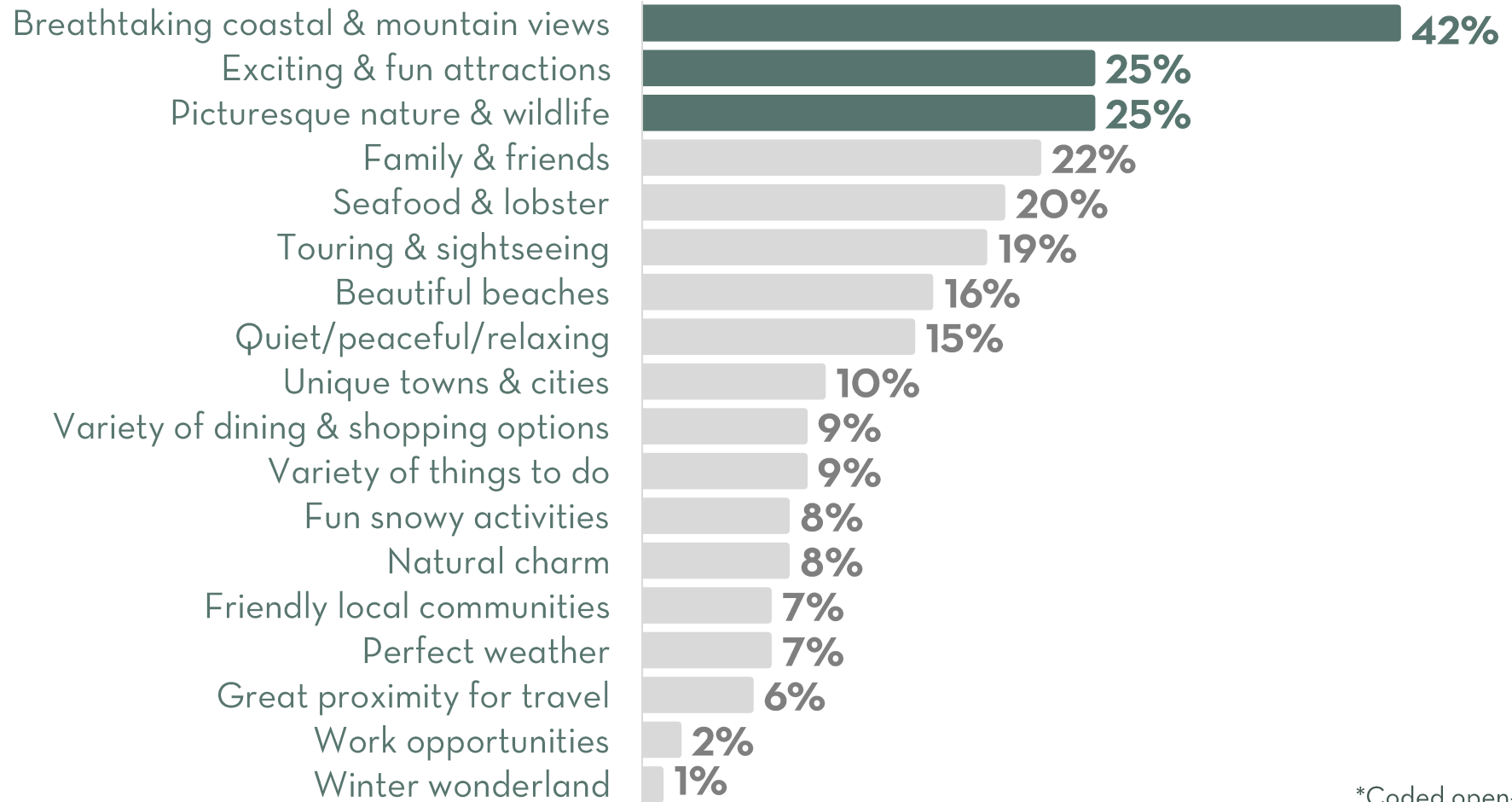
# TRIP PLANNING CYCLE : POST-TRIP EVALUATION





# MAINE AS A UNIQUE DESTINATION\*

## “What does Maine offer that other similar destinations do not offer?”



\*Coded open-ended responses.  
Multiple responses permitted.

# UNIQUENESS: “BREATHTAKING VIEWS”

*“We can roll the beauty of the mountains, the parks, and the coastline all into the same location.”*



*“I like the ability to go from the coastline to the mountains fairly simply. It’s just a variety of environments you can experience in one place.”*



*“There are unparalleled opportunities for painting. Iconic seascapes and architecture.”*





# UNIQUENESS: “EXCITING & FUN ATTRACTIONS”



*“The whimsical, educational toy store in Belfast, the golf cart tour in Castine, and the sculpture in Deer Isle.”*



*“L.L. Bean and the National Park. There’s good food, nature, the ocean, and nice people.”*



*“Lovely parks and lakes with many wonderful hiking trails and camping sites.”*





# UNIQUENESS: “PICTURESQUE NATURE & WILDLIFE”



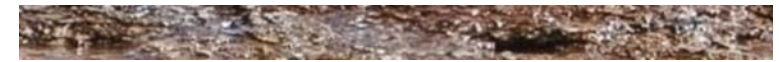
*“Natural areas, such as Acadia National Park and Spruce Islands.”*



*“The New England fall foliage season was always on our bucket list.”*

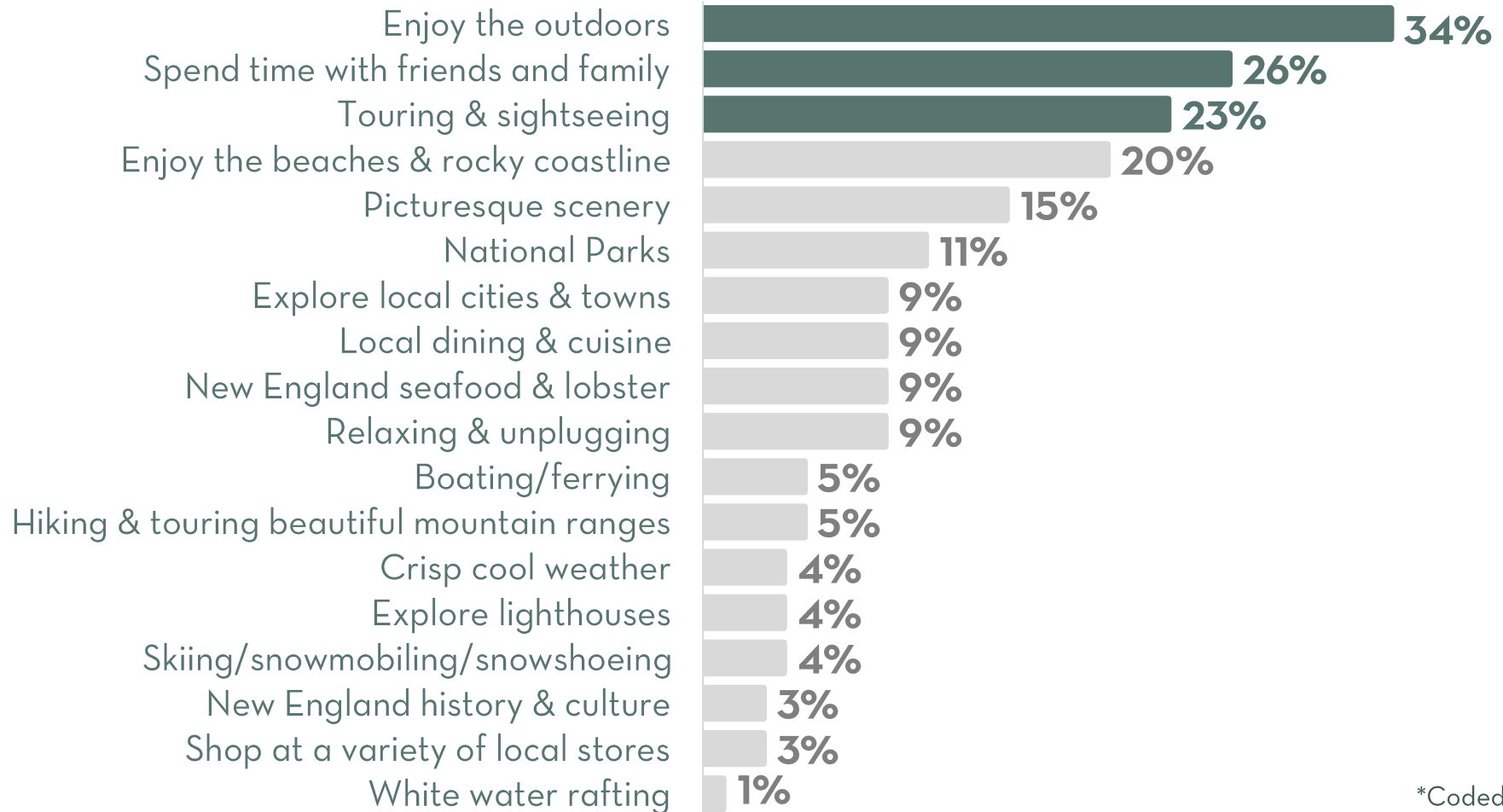


*“Beautiful rocky coastline, trees and wildflowers, and room to move and breathe.”*



# HIGHLIGHT OF TRIP\*

## “What was the highlight of your trip to Maine?”



\*Coded open-ended responses.  
Multiple responses permitted.



# HIGHLIGHTS: “ENJOY THE OUTDOORS”

*“We stayed by the lake and the green environment is just so nice and wonderful.”*



*“We just like walking on the beach, picking up shells and seeing the blue jays.”*



*“Cold weather, natural beauty, and being inside the gorgeous forest.”*





# HIGHLIGHTS: “SPEND TIME WITH FRIENDS & FAMILY”



*“The best part of the trip was getting caught in the rain at Owl’s Head with my fiancé.”*



*“Taking my granddaughter to the Botanical Gardens and watching fireworks from the porch.”*



*“Sunrise at Cadillac Mountain and hunting for sea glass at the beach with my family.”*



# HIGHLIGHTS: “TOURING & SIGHTSEEING”



*“Seeing the sparkly beaches, the majestic mountain peaks, and walking on the ocean bed when the tide is low.”*



*“The drive from Vermont to Maine and reaching our destination by the ocean.”*



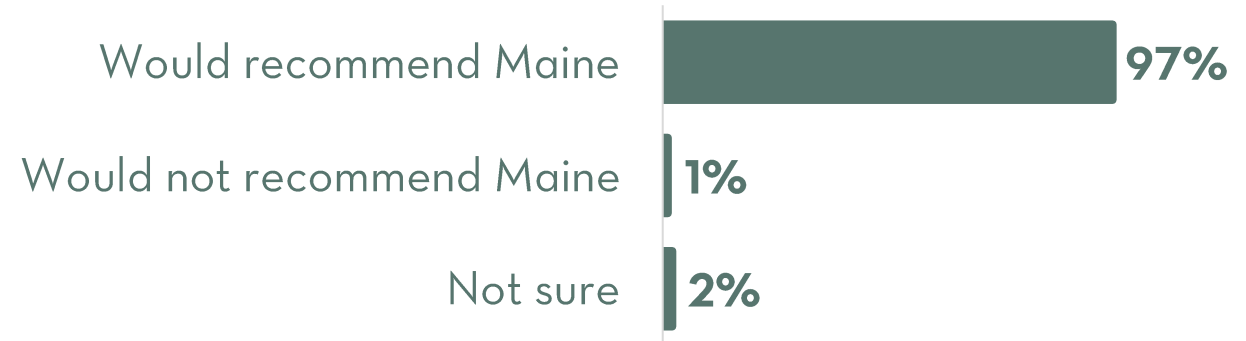
*“The Puffin Tour and fireworks over the harbor were wonderful.”*



# RECOMMENDING MAINE & ITS REGIONS

- » **97%** 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

## Likelihood of Recommending Maine

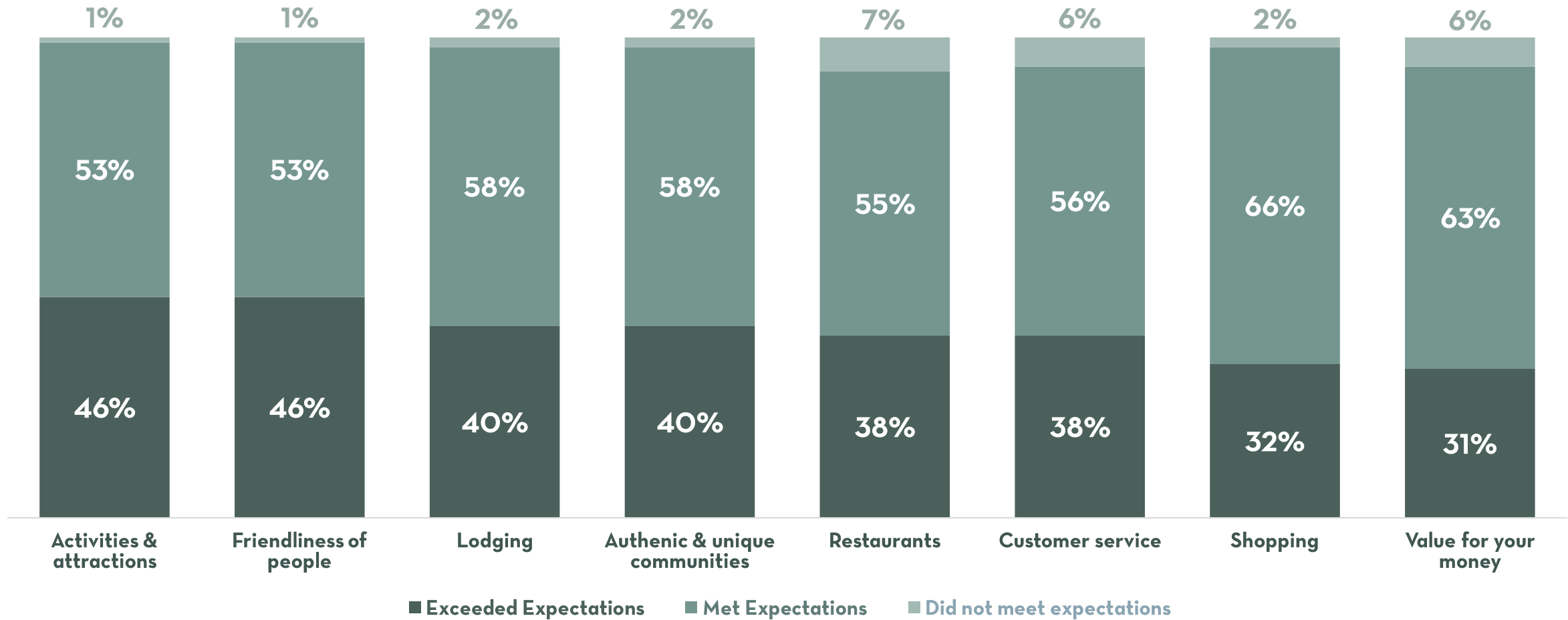


## Likelihood of Recommending Region Visited



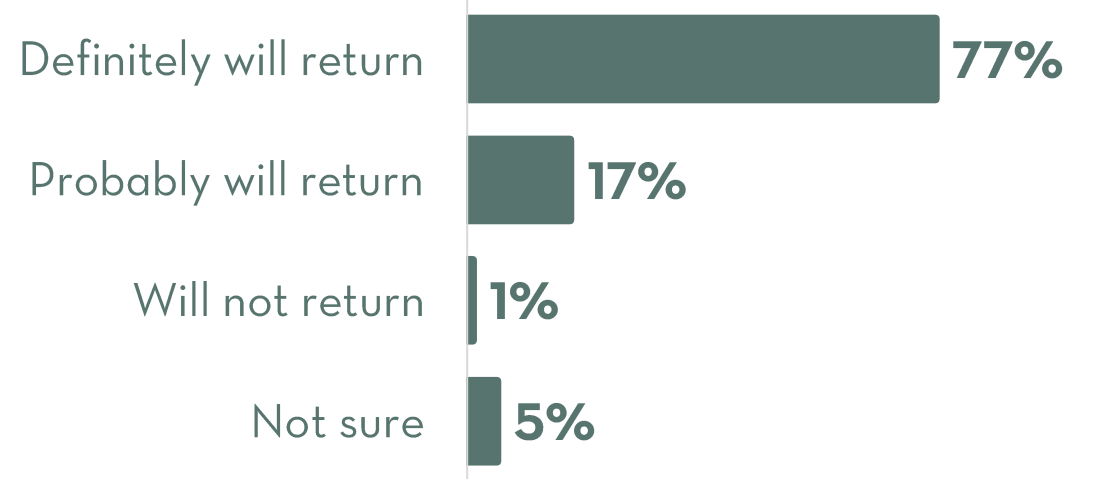


# TRIP EXPECTATIONS

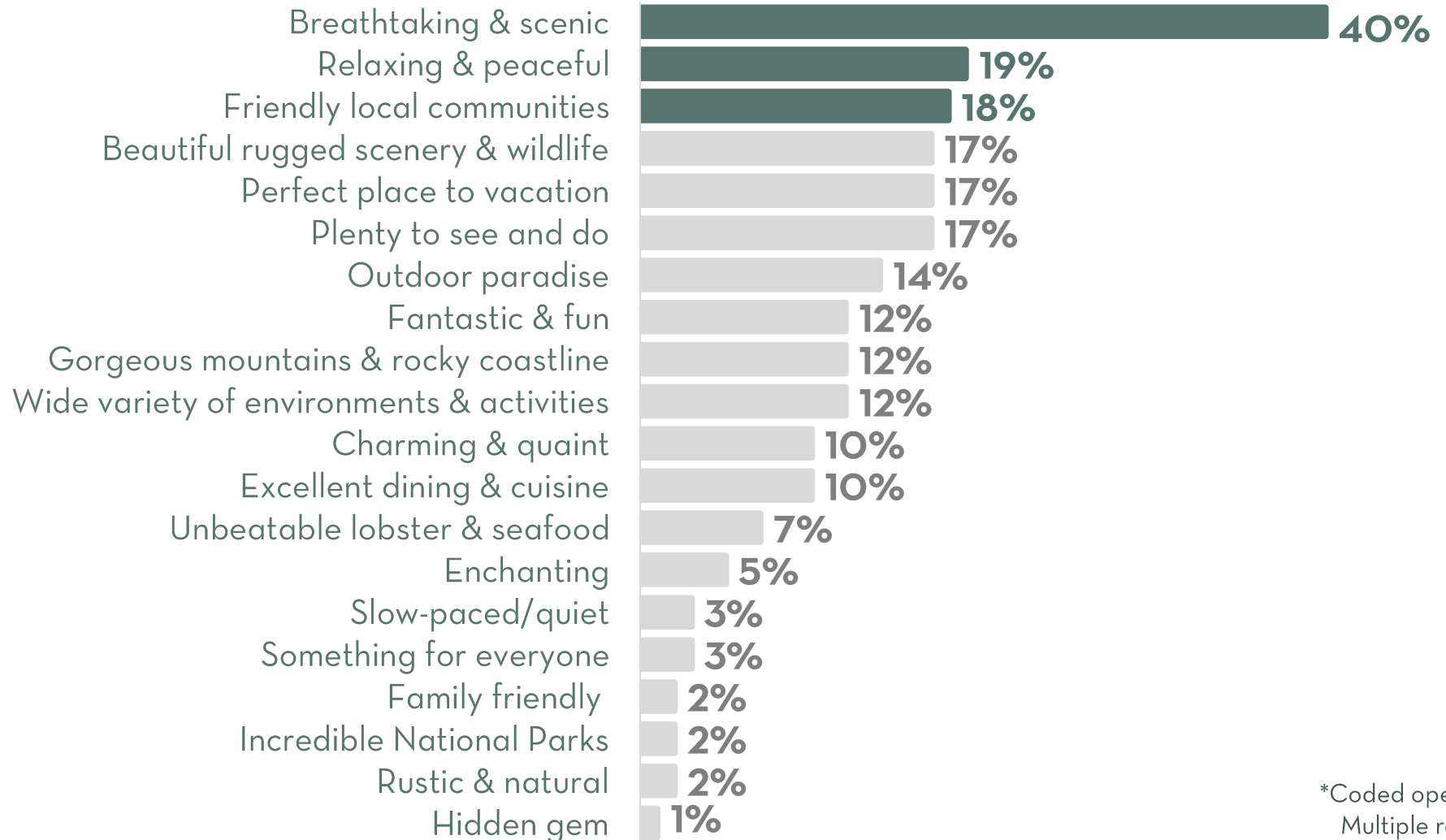


# LIKELIHOOD OF RETURNING TO MAINE

» **94%** of visitors will return to Maine for a future visit or vacation



# PERCEPTIONS OF MAINE\*



\*Coded open-ended responses.  
Multiple responses permitted.

# PERCEPTIONS: “BREATHTAKING & SCENIC”

*“You haven’t lived until you’ve vacationed in Maine. There is something so grounding and life-affirming about it.”*



*“You must put Maine on your bucket list. You will fall in love. You will come back. You have to experience it to understand.”*



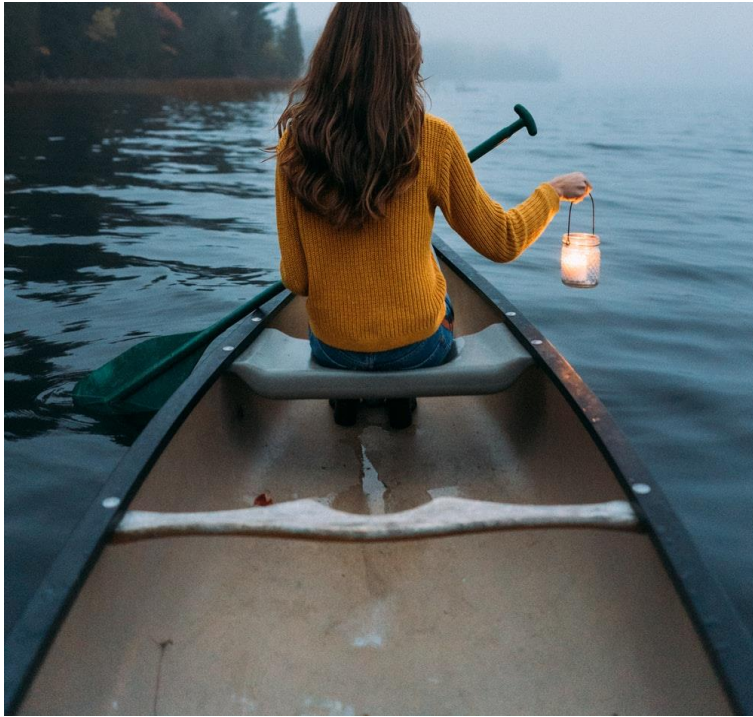
*“You owe it to yourself to put Maine on your adventure list. The beauty of the land is incredible.”*





# PERCEPTIONS: “RELAXING & PEACEFUL”

*“Wonderful place to relax and enjoy the beautiful nature.”*



*“With beautiful scenery and a relaxing environment, it is such a good place to travel.”*



*“Wide-open woods and nature that’s peaceful and beautiful. Fun for the kids, both on the lake and in the woods.”*





# PERCEPTIONS: “FRIENDLY LOCAL COMMUNITIES”

*“Wilderness, stunning views, friendly people, and awesome trails for snowboarding.”*



*“What a beautiful state, with well-organized activities, friendly people, and good seafood.”*



*“One of the best places to ride in the Northeast. People are super friendly and helpful.”*

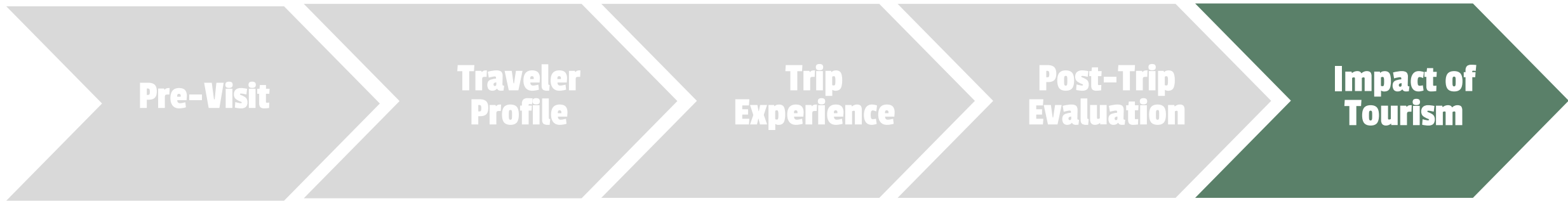




# SEASONAL COMPARISONS



# TRIP PLANNING CYCLE : IMPACT OF TOURISM





# NUMBER OF VISITORS

Number of Visitors	Winter	Summer	Fall	2021
Out-of-State Visitors	1,901,000	8,488,300	2,220,600	12,609,900
Maine Residents	983,200	1,616,800	391,900	2,991,900
Total Visitors	2,884,200	10,105,100	2,612,500	15,601,800

Market Share	Winter	Summer	Fall	2021
Out-of-State Visitors	65.9%	84.0%	85.0%	80.8%
Maine Residents	34.1%	16.0%	15.0%	19.2%

# LODGING METRICS\*

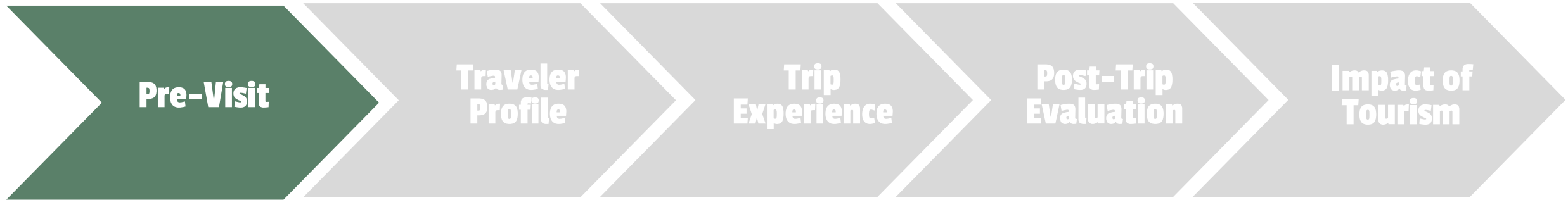
Occupancy [%]	Winter	Summer	Fall	2021
Hotel Occupancy Rate	40.9%	74.2%	67.9%	62.7%
Vacation Rental Occupancy Rate	17.3%	58.8%	42.9%	40.5%
Total Occupancy Rate	27.0%	64.2%	53.6%	49.4%

Average Daily Rate	Winter	Summer	Fall	2021
Hotel ADR	\$94.50	\$190.67	\$176.91	\$158.93
Vacation Rental ADR	\$114.57	\$249.43	\$161.19	\$177.95
Total ADR	\$89.30	\$189.51	\$151.19	\$146.32

Revenue per Available Room	Winter	Summer	Fall	2021
Hotel RevPAR	\$38.65	\$141.48	\$120.12	\$99.65
Vacation Rental RevPAR	\$119.00	\$146.66	\$69.15	\$72.07
Total RevPAR	\$24.11	\$121.66	\$81.04	\$72.28

\*Accommodation metrics are estimated with data from STR, Key Data, and Downs & St. Germain Research.

# TRIP PLANNING CYCLE : PRE-VISIT



# TRIP PLANNING CYCLE

Trip Planning Cycle	Winter	Summer	Fall	2021
A week or less	30%	18%	11%	19%
2 - 3 weeks	25%	16%	14%	17%
1 - 2 months	26%	26%	27%	26%
3 - 4 months	11%	15%	18%	15%
5 - 6 months	4%	9%	12%	9%
7 months - 1 year	2%	7%	11%	7%
More than 1 year	2%	9%	7%	7%
Days in Planning Cycle	26	54	72	50

Booking Window	Winter	Summer	Fall	2021
A week or less	35%	23%	15%	24%
2 - 3 weeks	27%	17%	15%	19%
1 - 2 months	24%	26%	29%	26%
3 - 4 months	9%	13%	17%	13%
5 - 6 months	3%	9%	12%	8%
7 months - 1 year	2%	6%	10%	6%
More than 1 year	1%	5%	3%	4%
Days in Booking Window	21	45	62	39



# ONLINE TRIP PLANNING SOURCES\*

Online Trip Planning Sources	Winter	Summer	Fall	2021
Online search engines	20%	32%	42%	31%
Hotel websites	10%	13%	18%	13%
TripAdvisor	8%	12%	17%	12%
Online travel agency	10%	12%	16%	12%
VisitMaine.com	7%	9%	16%	10%
Airbnb	6%	9%	9%	8%
Facebook	9%	8%	6%	8%
Airline websites	6%	7%	6%	7%
VRBO/HomeAway	3%	6%	9%	6%
Instagram	5%	6%	7%	6%
Traveler reviews/blogs/stories	4%	6%	9%	6%
MaineTourism.com	5%	5%	13%	6%
Visit Maine social media	4%	4%	7%	5%
YouTube	4%	5%	5%	5%
Vacation rental websites	3%	4%	7%	4%
DowneastAcadia.com	2%	2%	5%	3%
VisitPortland.com	4%	3%	2%	3%
Twitter	2%	3%	2%	3%
VisitBarHarbor.com	2%	3%	2%	3%
DiscoverNewEngland.com	1%	2%	3%	2%
MainesMidCoast.com	2%	2%	1%	2%
MaineLakesandMountains.com	2%	2%	2%	2%
VisitAroostook.com	1%	1%	1%	1%
KennebecValley.org	1%	1%	1%	1%
TheMaineHighlands.com	1%	1%	1%	1%
TheMaineBeaches.com	1%	1%	3%	1%
Other	6%	10%	7%	9%
None	47%	31%	24%	33%

\*Multiple responses permitted.

# OTHER TRIP PLANNING SOURCES\*

Other Trip Planning Sources	Winter	Summer	Fall	2021
Advice from friends/family	31%	30%	35%	31%
Travel guides/brochures	7%	8%	13%	9%
Travel books & magazines	6%	8%	8%	8%
Articles or travelogues	3%	8%	14%	8%
AAA	4%	7%	12%	7%
Travel planning apps	6%	6%	5%	6%
Called the Maine Office of Tourism	2%	3%	8%	4%
Visitor Guide	3%	3%	5%	3%
Called local CBVs	1%	2%	1%	2%
Called local Chambers of Commerce	1%	2%	1%	2%
Another Maine Tourism/Lodging Association	1%	2%	1%	2%
Visit Maine e-newsletter	2%	2%	2%	2%
Travel agent	2%	2%	3%	2%
Other	5%	5%	4%	5%
None	55%	52%	40%	51%

# REASON FOR VISITING\*

Reasons for Visiting	Winter	Summer	Fall	2021
Relax and unwind	21%	43%	37%	38%
Visiting friends/relatives	33%	25%	21%	26%
Sightseeing/touring	10%	25%	42%	25%
Nature & birdwatching	6%	15%	26%	15%
Beach	4%	10%	15%	10%
Special occasion	10%	8%	11%	9%
Active outdoor activities	4%	9%	12%	9%
Shopping	13%	6%	7%	7%
Attractions	4%	6%	9%	6%
Water activities	2%	7%	4%	6%
Snow activities	17%	1%	0%	4%
Special event	2%	3%	3%	3%
Conference/meeting	5%	2%	2%	3%
Culture/museums/history	3%	3%	4%	3%
Sporting event	1%	1%	1%	1%
Astrotourism	0%	1%	1%	1%
Vacation	0%	0%	0%	0%
Other	11%	13%	10%	12%

\*Multiple responses permitted.

# OTHER STATES/PROVINCES CONSIDERED\*

Other States/Provinces Considered	Winter	Summer	Fall	2021
No other states/provinces	74%	72%	70%	72%
New Hampshire	12%	11%	16%	12%
Massachusetts	7%	10%	10%	9%
Vermont	7%	7%	9%	7%
New York	5%	5%	6%	5%
Rhode Island	4%	4%	5%	4%
Connecticut	3%	3%	3%	3%
New Brunswick	2%	1%	1%	1%
Newfoundland and Labrador	1%	1%	1%	1%
Nova Scotia	2%	1%	1%	1%
Ontario	2%	1%	1%	1%
Prince Edward Island	1%	1%	1%	1%
Quebec	3%	1%	1%	1%
Other	2%	5%	3%	4%
Not sure	0%	0%	0%	0%



# ADVERTISING/PROMOTIONS

Recalled Advertising	Winter	Summer	Fall	2021
Yes	32%	37%	41%	37%
No	68%	63%	59%	63%

# ADVERTISING/PROMOTIONS\*

Sources of Advertising Noticed*	Winter	Summer	Fall	2021
Social media	39%	37%	28%	36%
Internet	32%	35%	34%	34%
Cable or satellite television	20%	22%	20%	21%
Magazine	15%	19%	19%	18%
Radio	11%	11%	11%	11%
Maine travel/visitor guide	14%	9%	8%	10%
VisitMaine.com	13%	10%	7%	10%
Traveler reviews/blogs	8%	10%	10%	10%
Newspaper	7%	9%	7%	8%
Online streaming service	9%	7%	6%	7%
Brochure	7%	7%	4%	6%
AAA	5%	7%	3%	6%
Deal – based promotion	5%	5%	3%	5%
Music/podcast streaming	5%	5%	5%	5%
Billboard	5%	4%	4%	4%
Other	8%	7%	5%	7%
Not sure	1%	2%	3%	2%

# TRIP PLANNING CYCLE : TRAVELER PROFILE



# ORIGIN REGION

Region of Origin	Winter	Summer	Fall	2021
Maine	34%	16%	15%	19%
New England	27%	28%	35%	29%
Mid-Atlantic	18%	23%	26%	23%
Southeast	13%	13%	11%	13%
Southwest	1%	4%	3%	3%
Midwest	5%	10%	3%	7%
West	2%	5%	6%	5%
Intl	<1%	1%	1%	1%



# ORIGIN STATE/PROVINCE

Origin States & Provinces	Winter	Summer	Fall	2021
Maine	34%	16%	17%	19%
Massachusetts	11%	13%	16%	13%
New York	3%	11%	12%	10%
New Hampshire	9%	8%	6%	8%
Florida	4%	6%	4%	5%
Connecticut	2%	4%	8%	4%
New Jersey	2%	4%	5%	4%
Virginia	2%	3%	3%	3%
North Carolina	5%	1%	2%	2%
Pennsylvania	5%	1%	5%	2%
Texas	1%	3%	1%	2%
Maryland	2%	1%	2%	1%
Michigan	2%	1%	1%	1%
Vermont	1%	1%	3%	1%

# ORIGIN MARKET

Origin Markets	Winter	Summer	Fall	2021
New York City <sup>1</sup>	4%	11%	10%	10%
Boston	6%	7%	8%	7%
Washington D.C. – Baltimore <sup>2</sup>	6%	4%	4%	4%
Atlanta	1%	2%	1%	2%
Chicago	1%	2%	2%	2%
Philadelphia	3%	2%	3%	2%
Portland, ME	3%	2%	1%	2%

<sup>1</sup>Includes some markets in New Jersey, Pennsylvania, and Connecticut.

<sup>2</sup>Includes some markets in Maryland, Virginia, and West Virginia.

# TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	Winter	Summer	Fall	2021
Traveled alone	32%	17%	12%	19%
As a couple	29%	40%	53%	40%
As a family	19%	32%	23%	28%
With business associates	2%	1%	1%	1%
In a tour group	0%	1%	1%	1%
With other couples/friends	17%	9%	9%	10%
Other	0%	1%	1%	1%
Average Travel Party Size	2.2	2.8	2.7	2.7

# TRAVEL WITH CHILDREN\*

Children in Travel Party	Winter	Summer	Fall	2021
No children	86%	77%	85%	80%
Children younger than 6	5%	8%	4%	7%
Children 6 – 12	7%	11%	7%	10%
Children 13 – 17	7%	11%	4%	9%



# DEMOGRAPHIC PROFILE

Age	Winter	Summer	Fall	2021
Under 25	17%	5%	2%	7%
25 - 34	24%	17%	12%	17%
35 - 44	19%	22%	21%	21%
45 - 54	18%	17%	21%	18%
55 - 65	13%	18%	27%	19%
Over 65	9%	21%	17%	18%
Median Age	39	48	51	48

Gender	Winter	Summer	Fall	2021
Male	51%	45%	47%	46%
Female	49%	55%	53%	54%

# DEMOGRAPHIC PROFILE

<b>Educational Attainment</b>	<b>Winter</b>	<b>Summer</b>	<b>Fall</b>	<b>2021</b>
High school or less	21%	9%	5%	11%
Some college or technical school	21%	15%	12%	16%
College or technical school graduate	42%	48%	59%	48%
Graduate school	17%	27%	24%	25%

<b>Race/Ethnicity</b>	<b>Winter</b>	<b>Summer</b>	<b>Fall</b>	<b>2021</b>
White	88%	90%	87%	89%
Black	5%	2%	2%	3%
Hispanic	3%	3%	2%	3%
Indigenous	1%	2%	1%	2%
Asian	3%	1%	6%	2%
Other	0%	1%	2%	1%

# LIFESTYLE PROFILE

Marital Status	Winter	Summer	Fall	2021
Single/widowed	39%	24%	18%	26%
Married/living with partner	61%	76%	82%	74%

Employment Status	Winter	Summer	Fall	2021
Employed full-time	54%	56%	53%	54%
Employed part-time	10%	9%	12%	10%
Contract/freelance/temporary employee	8%	6%	7%	6%
Retired	13%	21%	21%	20%
Not currently employed	7%	4%	4%	5%
Student	8%	4%	3%	5%

# VISITOR PROFILE

Household Income	Winter	Summer	Fall	2021
Less than \$25,000	9%	5%	3%	5%
\$25,000 - \$49,999	16%	10%	9%	11%
\$50,000 - \$74,999	22%	20%	24%	21%
\$75,000 - \$99,999	19%	22%	25%	22%
\$100,000 - \$149,999	19%	21%	21%	21%
\$150,000 - \$199,999	8%	12%	9%	11%
\$200,000 - \$249,999	4%	4%	4%	4%
\$250,000 or more	3%	6%	4%	5%
<b>Median Household Income</b>	<b>\$78,900</b>	<b>\$92,000</b>	<b>\$89,000</b>	<b>\$89,800</b>



# NEW & RETURNING VISITORS

Previous Trips to Maine	Winter	Summer	Fall	2021
This is my first time	11%	25%	31%	23%
2 - 5 times	25%	27%	27%	27%
6 - 10 times	19%	12%	13%	14%
11+ times	45%	36%	29%	36%

# TRIP PLANNING CYCLE : TRIP EXPERIENCE



# TRANSPORTATION

Means of Transportation	Winter	Summer	Fall	2021
Drove to Maine	92%	81%	79%	83%
Flew into Portland Intl Jetport	3%	7%	5%	6%
Flew into Boston Logan Intl	1%	4%	5%	4%
Flew into Bangor Intl Airport	2%	2%	4%	2%
Took a motor coach tour or bus	0%	2%	3%	2%
Flew into Northern Maine Regional Airport	1%	1%	1%	1%
Flew into another airport	0%	1%	1%	1%
Traveled by train	1%	1%	1%	1%

# LENGTH OF STAY

Nights Stayed	Winter	Summer	Fall	2021
Not staying overnight	28%	31%	15%	28%
1 night	7%	4%	3%	4%
2 nights	12%	10%	10%	10%
3 nights	11%	13%	14%	13%
4 nights	10%	9%	16%	10%
5+ nights	33%	33%	42%	35%
Average Length of Stay	5.2	5.9	5.4	5.7

# ACCOMMODATIONS

Accommodations	Winter	Summer	Fall	2021
Not spending the night	28%	31%	15%	28%
Hotel/motel/resort	22%	24%	34%	25%
Friends/family home	28%	15%	12%	19%
Vacation rental home	4%	10%	11%	9%
Personal second home	9%	7%	6%	8%
Bed & Breakfast/Inn	4%	5%	9%	4%
Campground/RV Park	1%	4%	8%	3%
Wilderness camping	1%	2%	3%	2%
Sporting camp/wilderness lodge	1%	1%	1%	1%
Outdoor Outfitter	0%	0%	1%	0%
Other	2%	1%	0%	1%



# BOOKING

Booking Methods	Winter	Summer	Fall	2021
Directly with the hotel/condo	58%	48%	45%	49%
Online travel agency	13%	16%	23%	17%
Airbnb	11%	11%	9%	11%
Short-term rental service	6%	6%	6%	6%
Vacation rental company	2%	4%	5%	4%
Offline travel agent	1%	1%	2%	1%
Group tour operator	0%	1%	2%	1%
Travel package provider	1%	1%	1%	1%
Other	8%	12%	7%	10%

# IN-MARKET RESOURCES\*

In-Market Resources	Winter	Summer	Fall	2021
Navigation website/apps	23%	37%	54%	37%
Restaurant website/app	13%	20%	19%	19%
Visitor Information Centers	11%	18%	24%	18%
Hotel/resort website/app	8%	12%	20%	13%
Materials from hotel/campground	6%	14%	16%	13%
Personal social media	10%	12%	12%	12%
Trip planning app	7%	8%	13%	9%
Destination social media	8%	9%	11%	9%
VisitMaine.com	8%	7%	11%	8%
Booking website/app	6%	6%	4%	6%
Airline website/app	3%	3%	2%	3%
Chambers of Commerce	2%	3%	5%	3%
VisitBarHarbor.com	2%	2%	1%	2%
Other	3%	5%	6%	5%
None	48%	29%	20%	31%

# ACTIVITIES\*

Activities	Winter	Summer	Fall	2021
Food/beverage/culinary	59%	64%	78%	65%
Touring/sightseeing	35%	53%	67%	52%
Active outdoor activities	42%	40%	40%	40%
Shopping	40%	38%	48%	40%
Water activities	5%	34%	27%	27%
History/culture	8%	16%	21%	15%
Entertainment/attractions	3%	10%	18%	10%
Business conference/meeting	6%	3%	2%	3%
Astrotourism <sup>1</sup>	-	4%	5%	3%
Other	25%	5%	5%	9%

\*Multiple responses permitted.

<sup>1</sup>Option not available in Winter 2021.

# FOOD & BEVERAGE ACTIVITIES\*

Food & Beverage Activities	Winter	Summer	Fall	2021
Ate lobster	23%	42%	52%	40%
Ate other local seafood	24%	42%	37%	38%
Going to local brew pubs/craft breweries	32%	25%	44%	29%
Consumed other locally produced Maine foods	19%	21%	23%	21%
Enjoyed unique Maine food or beverages	17%	18%	13%	17%
Enjoyed high-end cuisine or five-star dining	8%	11%	19%	12%
Enjoying local food at fairs/festivals	3%	11%	11%	10%
Ate farm-to-table or organic cuisine	7%	9%	7%	8%
Visited Farmer's Markets	4%	10%	7%	8%
Other	8%	4%	3%	5%

# TOURING & SIGHTSEEING ACTIVITIES\*

Touring & Sightseeing Activities	Winter	Summer	Fall	2021
Enjoying the ocean views/rocky coast	19%	42%	55%	40%
Sightseeing	23%	41%	50%	39%
Driving for pleasure	23%	30%	45%	31%
Nature cruises or tours	2%	24%	28%	21%
Enjoying the mountain views	16%	19%	29%	20%
Wildlife viewing/bird watching	7%	21%	30%	20%
Photography	14%	18%	31%	19%
Tours of communities/local architecture	4%	14%	17%	13%
Viewing fall colors	5%	0%	38%	7%
Other	1%	1%	4%	2%



# ACTIVE OUTDOOR ACTIVITIES\*

Active Outdoor Activities	Winter	Summer	Fall	2021
Hiking/climbing/backpacking	12%	34%	32%	30%
Exploring State and National Parks	7%	20%	22%	18%
Camping	3%	9%	6%	7%
Bicycling touring	1%	6%	7%	5%
Riding all-terrain vehicles	4%	2%	3%	3%
Alpine skiing/snowboarding	13%	0%	1%	3%
Mountain/Fat Biking	2%	3%	3%	3%
Hunting	3%	2%	3%	2%
Snowmobiling	10%	0%	0%	2%
Nordic skiing	5%	0%	0%	1%
Snowshoeing	6%	0%	0%	1%
Other	4%	5%	0%	4%

# SHOPPING ACTIVITIES\*

Shopping Activities	Winter	Summer	Fall	2021
Outlet shopping	19%	16%	24%	18%
Shopping for gifts/souvenirs	12%	16%	26%	17%
Shopping in downtown areas <sup>1</sup>	-	17%	25%	15%
Shopping for unique/locally produced goods	9%	13%	20%	13%
Shopping for "Made in Maine" products	6%	8%	19%	9%
Shopping at malls	16%	7%	9%	9%
Shopping for antiques/local arts and crafts	4%	7%	16%	8%
Other	5%	2%	2%	3%

\*Multiple responses permitted.

<sup>1</sup>Option not available in Winter 2021.

# WATER ACTIVITIES\*

Water Activities	Winter	Summer	Fall	2021
Going to the beach	0%	17%	16%	14%
Outdoor swimming	0%	16%	12%	12%
Canoeing/kayaking	1%	14%	9%	11%
Fishing	4%	11%	11%	10%
Motor boating	0%	9%	5%	7%
Sailing	0%	5%	3%	4%
Pool swimming	0%	4%	3%	3%
White water rafting	0%	3%	1%	2%
Water skiing/jet skiing	0%	3%	1%	2%
Surfing	0%	1%	0%	1%
Other	0%	3%	1%	2%

# HISTORY/CULTURE ACTIVITIES\*

History/Culture Activities	Winter	Summer	Fall	2021
Visit historic sites/museums	7%	11%	15%	11%
Visit art museums/local artisan studios	4%	8%	11%	8%
Get to know the local people and/or culture	5%	8%	4%	7%
Painting/drawing/sketching	1%	3%	4%	3%
Attend plays/musicals/theatrical events	1%	2%	2%	2%
Attend popular music concerts/events	1%	2%	2%	2%
Attend operas/classical music events	0%	2%	2%	2%
Other	0%	1%	2%	1%

# ENTERTAINMENT ACTIVITIES\*

Entertainment Activities	Winter	Summer	Fall	2021
Amusement/theme parks	1%	2%	1%	2%
Outdoor fun centers	2%	2%	2%	2%
Bars/nightlife	1%	2%	2%	2%
Animal parks/zoos	1%	1%	1%	1%
Children's museums	1%	1%	2%	1%
Water parks	1%	1%	2%	1%
Summer camps	0%	1%	1%	1%
Agricultural fairs	0%	1%	1%	1%
Horseback riding	0%	1%	1%	1%
Attend sporting events	1%	1%	1%	1%
Other	1%	5%	1%	4%



# OTHER STATES/PROVINCES VISITED\*

Other States/Provinces Visited	Winter	Summer	Fall	2021
No other states/provinces	89%	73%	67%	75%
New Hampshire	7%	15%	16%	14%
Massachusetts	3%	13%	17%	12%
New York	1%	7%	7%	6%
Vermont	1%	5%	7%	5%
Connecticut	1%	5%	4%	4%
Rhode Island	0%	3%	4%	3%
New Brunswick	0%	1%	0%	1%
Nova Scotia	0%	1%	0%	1%
Ontario	0%	1%	1%	1%
Quebec	0%	1%	0%	1%
Newfoundland and Labrador	0%	0%	0%	0%
Prince Edward Island	0%	0%	0%	0%
Other	1%	3%	1%	2%

# TRAVELING IN MAINE\*

Maine Regions Visited	Winter	Summer	Fall	2021
No other regions	51%	43%	46%	45%
Greater Portland & Casco Bay	22%	40%	27%	34%
The Maine Beaches	14%	32%	34%	29%
Downeast & Acadia	10%	31%	29%	27%
Midcoast & Islands	11%	29%	35%	27%
The Maine Highlands	26%	16%	15%	18%
Maine Lakes & Mountains	15%	11%	12%	12%
Kennebec Valley	20%	9%	6%	11%
Aroostook County	24%	8%	4%	10%
Other	0%	1%	1%	1%

# TRIP PLANNING CYCLE : POST-TRIP EVALUATION



# RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	Winter	Summer	Fall	2021
Would recommend Maine	98%	97%	98%	97%
Would not recommend Maine	1%	1%	0%	1%
Not sure	1%	2%	2%	2%

Recommending Regions	Winter	Summer	Fall	2021
Definitely recommend region	84%	79%	77%	80%
Probably would recommend region	13%	13%	17%	14%
Would not recommend region	1%	1%	1%	1%
Not sure	2%	7%	5%	5%

# RETURNING TO MAINE

Returning to Maine	Winter	Summer	Fall	2021
Definitely will return	86%	77%	69%	77%
Probably will return	12%	18%	19%	17%
Probably will not return	0%	1%	1%	1%
Not sure	2%	4%	11%	5%



# ANNUAL COMPARISONS



# TRIP PLANNING CYCLE : PRE-VISIT



# TRIP PLANNING CYCLE

Trip Planning Cycle	2020	2021
A week or less	27%	19%
2 - 3 weeks	24%	17%
1 - 2 months	26%	26%
3 - 4 months	11%	15%
5 - 6 months	5%	9%
7 months - 1 year	4%	7%
More than 1 year	4%	7%
Days in Planning Cycle	30	50

Booking Window	2020	2021
A week or less	35%	24%
2 - 3 weeks	24%	19%
1 - 2 months	24%	26%
3 - 4 months	8%	13%
5 - 6 months	4%	8%
7 months - 1 year	3%	6%
More than 1 year	3%	4%
Days in Booking Window	22	39

# ONLINE TRIP PLANNING SOURCES\*

Online Trip Planning Sources	2020	2021
Online search engines	28%	31%
Hotel websites	13%	13%
TripAdvisor	11%	12%
Online travel agency	12%	12%
VisitMaine.com	8%	10%
Airbnb	9%	8%
Facebook	15%	8%
Airline websites	5%	7%
VRBO/HomeAway	4%	6%
Instagram	8%	6%
Traveler reviews/blogs/stories	9%	6%
MaineTourism.com	5%	6%
Visit Maine social media	5%	5%
YouTube	5%	5%
Vacation rental websites	4%	4%
DowneastAcadia.com	3%	3%
VisitPortland.com	4%	3%
Twitter	3%	3%
VisitBarHarbor.com	2%	3%
DiscoverNewEngland.com	2%	2%
MainesMidCoast.com	1%	2%
MaineLakesandMountains.com	2%	2%
VisitAroostook.com	1%	1%
KennebecValley.org	1%	1%
TheMaineHighlands.com	1%	1%
TheMaineBeaches.com	1%	1%
Other	7%	9%
None	34%	33%

\*Multiple responses permitted.

# OTHER TRIP PLANNING SOURCES\*

Other Trip Planning Sources	2020	2021
Advice from friends/family	36%	31%
Travel guides/brochures	9%	9%
Travel books & magazines	7%	8%
Articles or travelogues	5%	8%
AAA	5%	7%
Travel planning apps	7%	6%
Called the Maine Office of Tourism	2%	4%
Visitor Guide	3%	3%
Called local CBVs	2%	2%
Called local Chambers of Commerce	1%	2%
Another Maine Tourism/Lodging Association	2%	2%
Visit Maine e-newsletter	2%	2%
Travel agent	2%	2%
Other	4%	5%
None	47%	51%



# REASON FOR VISITING\*

Reasons for Visiting	2020	2021
Relax and unwind	26%	38%
Visiting friends/relatives	29%	26%
Sightseeing/touring	16%	25%
Nature & birdwatching	11%	15%
Beach	10%	10%
Special occasion	9%	9%
Active outdoor activities	10%	9%
Shopping	12%	7%
Attractions	5%	6%
Water activities	6%	6%
Snow activities	3%	4%
Special event	3%	3%
Conference/meeting	4%	3%
Culture/museums/history	3%	3%
Sporting event	1%	1%
Astrotourism <sup>1</sup>	-	1%
Other	6%	12%

\*Multiple responses permitted.

<sup>1</sup>Option not available in 2020.

# OTHER STATES/PROVINCES CONSIDERED\*

Other States/Provinces Considered	2020	2021
No other states/provinces	69%	72%
New Hampshire	15%	12%
Massachusetts	10%	9%
Vermont	8%	7%
New York	5%	5%
Rhode Island	5%	4%
Connecticut	3%	3%
New Brunswick	2%	1%
Newfoundland and Labrador	1%	1%
Nova Scotia	2%	1%
Ontario	1%	1%
Prince Edward Island	1%	1%
Quebec	2%	1%
Other	4%	4%
Not sure	0%	0%

# ADVERTISING/PROMOTIONS

Recalled Advertising	2020	2021
Yes	41%	37%
No	59%	63%

# ADVERTISING/PROMOTIONS\*

Sources of Advertising Noticed*	2020	2021
Social media	38%	36%
Internet	36%	34%
Cable or satellite television	26%	21%
Magazine	18%	18%
Radio	15%	11%
Maine travel/visitor guide	14%	10%
VisitMaine.com	12%	10%
Traveler reviews/blogs	12%	10%
Newspaper	10%	8%
Online streaming service	9%	7%
Brochure	8%	6%
AAA	6%	6%
Deal – based promotion	5%	5%
Music/podcast streaming	6%	5%
Billboard	6%	4%
Other	5%	7%
Not sure	1%	2%

# TRIP PLANNING CYCLE : TRAVELER PROFILE





# ORIGIN REGION

Region of Origin	2020	2021
Maine	29%	19%
New England	37%	29%
Mid-Atlantic	15%	23%
Southeast	8%	13%
Southwest	2%	3%
Midwest	4%	7%
West	2%	5%
Intl	3%	1%

# ORIGIN STATE/PROVINCE

Origin States & Provinces	2020	2021
Maine	29%	19%
Massachusetts	16%	13%
New York	6%	10%
New Hampshire	14%	8%
Florida	4%	5%
Connecticut	5%	4%
New Jersey	3%	4%
Virginia	1%	3%
North Carolina	1%	2%
Pennsylvania	2%	2%
Texas	1%	2%
Maryland	1%	1%
Michigan	0%	1%
Vermont	2%	1%

# ORIGIN MARKET

Origin Markets	2020	2021
New York City <sup>1</sup>	6%	10%
Boston	10%	7%
Washington D.C. – Baltimore <sup>2</sup>	3%	4%
Atlanta	0%	2%
Chicago	1%	2%
Philadelphia	2%	2%
Portland, ME	3%	2%

<sup>1</sup>Includes some markets in New Jersey, Pennsylvania, and Connecticut.

<sup>2</sup>Includes some markets in Maryland, Virginia, and West Virginia.

# TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2020	2021
Traveled alone	21%	19%
As a couple	39%	40%
As a family	28%	28%
With business associates	1%	1%
In a tour group	0%	1%
With other couples/friends	10%	10%
Other	1%	1%
Average Travel Party Size	2.5	2.7

# TRAVEL WITH CHILDREN\*

Children in Travel Party	2020	2021
No children	80%	80%
Children younger than 6	7%	7%
Children 6 – 12	10%	10%
Children 13 – 17	9%	9%

Gender	2020	2021
Male	43%	46%
Female	57%	54%



# DEMOGRAPHIC PROFILE

<b>Educational Attainment</b>	<b>2020</b>	<b>2021</b>
High school or less	11%	11%
Some college or technical school	22%	16%
College or technical school graduate	45%	48%
Graduate school	22%	25%

<b>Race/Ethnicity</b>	<b>2020</b>	<b>2021</b>
White	88%	89%
Black	3%	3%
Hispanic	3%	3%
Indigenous	1%	2%
Asian	4%	2%
Other	1%	1%

# LIFESTYLE PROFILE

<b>Marital Status</b>	<b>2020</b>	<b>2021</b>
Single/widowed	33%	26%
Married/living with partner	67%	74%

<b>Employment Status</b>	<b>2020</b>	<b>2021</b>
Employed full-time	53%	54%
Employed part-time	11%	10%
Contract/freelance/temporary employee	6%	6%
Retired	16%	20%
Not currently employed	7%	5%
Student	7%	5%

# LIFESTYLE PROFILE

Household Income	2020	2021
Less than \$25,000	8%	5%
\$25,000 - \$49,999	17%	11%
\$50,000 - \$74,999	20%	21%
\$75,000 - \$99,999	20%	22%
\$100,000 - \$149,999	19%	21%
\$150,000 - \$199,999	8%	11%
\$200,000 - \$249,999	4%	4%
\$250,000 or more	4%	5%
<b>Median Household Income</b>	<b>\$81,300</b>	<b>\$89,800</b>

# NEW & RETURNING VISITORS

Previous Trips to Maine	2020	2021
This is my first time	17%	23%
2 - 5 times	28%	27%
6 - 10 times	17%	14%
11+ times	38%	36%

# TRIP PLANNING CYCLE : TRIP EXPERIENCE





# TRANSPORTATION

Means of Transportation	2020	2021
Drove to Maine	86%	83%
Flew into Portland Intl Jetport	6%	6%
Flew into Boston Logan Intl	2%	4%
Flew into Bangor Intl Airport	3%	2%
Took a motor coach tour or bus	1%	2%
Flew into Northern Maine Regional Airport	0%	1%
Flew into another airport	0%	1%
Traveled by train	1%	1%

# LENGTH OF STAY

Nights Stayed	2020	2021
Not staying overnight	31%	28%
1 night	7%	4%
2 nights	12%	10%
3 nights	12%	13%
4 nights	8%	10%
5+ nights	30%	35%
Average Length of Stay	5.3	5.7

# ACCOMMODATIONS

Accommodations	2020	2021
Not spending the night	31%	28%
Hotel/motel/resort	21%	25%
Friends/family home	9%	19%
Vacation rental home	8%	9%
Personal second home	6%	8%
Bed & Breakfast/Inn	6%	4%
Campground/RV Park	19%	3%
Wilderness camping	2%	2%
Sporting camp/wilderness lodge	1%	1%
Outdoor Outfitter	0%	0%
Other	2%	1%

# BOOKING

Booking Methods	2020	2021
Directly with the hotel/condo	41%	49%
Online travel agency	23%	17%
Airbnb	14%	11%
Short-term rental service	6%	6%
Vacation rental company	2%	4%
Offline travel agent	2%	1%
Group tour operator	1%	1%
Travel package provider	2%	1%
Other	9%	10%

# IN-MARKET RESOURCES\*

In-Market Resources	2020	2021
Navigation website/apps	32%	37%
Restaurant website/app	19%	19%
Visitor Information Centers	15%	18%
Hotel/resort website/app	8%	13%
Materials from hotel/campground	11%	13%
Personal social media	13%	12%
Trip planning app	9%	9%
Destination social media	10%	9%
VisitMaine.com	7%	8%
Booking website/app	7%	6%
Airline website/app	3%	3%
Chambers of Commerce	2%	3%
VisitBarHarbor.com	2%	2%
Other	5%	5%
None	35%	31%



# ACTIVITIES\*

Activities	2020	2021
Food/beverage/culinary	64%	65%
Touring/sightseeing	49%	52%
Active outdoor activities	46%	40%
Shopping	39%	40%
Water activities	29%	27%
History/culture	13%	15%
Entertainment/attractions	6%	10%
Business conference/meeting	4%	3%
Astrotourism	-	3%
Other	10%	9%

# FOOD & BEVERAGE ACTIVITIES\*

Food & Beverage Activities	2020	2021
Ate lobster	32%	40%
Ate other local seafood	32%	38%
Going to local brew pubs/craft breweries	28%	29%
Consumed other locally produced Maine foods	21%	21%
Enjoyed unique Maine food or beverages	21%	17%
Enjoyed high-end cuisine or five-star dining	10%	12%
Enjoying local food at fairs/festivals	7%	10%
Ate farm-to-table or organic cuisine	12%	8%
Visited Farmer's Markets	7%	8%
Other	7%	5%

# TOURING & SIGHTSEEING ACTIVITIES\*

Touring & Sightseeing Activities	2020	2021
Enjoying the ocean views/rocky coast	33%	40%
Sightseeing	36%	39%
Driving for pleasure	27%	31%
Nature cruises or tours	6%	21%
Enjoying the mountain views	25%	20%
Wildlife viewing/bird watching	10%	20%
Photography	21%	19%
Tours of communities/local architecture	11%	13%
Viewing 2020 colors	12%	7%
Other	2%	2%

# ACTIVE OUTDOOR ACTIVITIES\*

Active Outdoor Activities	2020	2021
Hiking/climbing/backpacking	36%	30%
Exploring State and National Parks	23%	18%
Camping	9%	7%
Bicycling touring	4%	5%
Riding all-terrain vehicles	5%	3%
Alpine skiing/snowboarding	3%	3%
Mountain/Fat Biking	4%	3%
Hunting	9%	2%
Snowmobiling	2%	2%
Nordic skiing	1%	1%
Snowshoeing	2%	1%
Other	8%	4%

# SHOPPING ACTIVITIES\*

Shopping Activities	2020	2021
Outlet shopping	18%	18%
Shopping for gifts/souvenirs	14%	17%
Shopping in downtown areas <sup>1</sup>	-	15%
Shopping for unique/locally produced goods	13%	13%
Shopping for "Made in Maine" products	8%	9%
Shopping at malls	16%	9%
Shopping for antiques/local arts and crafts	7%	8%
Other	3%	3%

\*Multiple responses permitted.

<sup>1</sup>Option not available in 2020.

# WATER ACTIVITIES\*

Water Activities	2020	2021
Going to the beach	17%	14%
Outdoor swimming	15%	12%
Canoeing/kayaking	12%	11%
Fishing	11%	10%
Motor boating	7%	7%
Sailing	4%	4%
Pool swimming	3%	3%
White water rafting	1%	2%
Water skiing/jet skiing	3%	2%
Surfing	1%	1%
Other	0%	2%



# HISTORY/CULTURE ACTIVITIES\*

History/Culture Activities	2020	2021
Visit historic sites/museums	10%	11%
Visit art museums/local artisan studios	6%	8%
Get to know the local people and/or culture	4%	7%
Painting/drawing/sketching	6%	3%
Attend plays/musicals/theatrical events	2%	2%
Attend popular music concerts/events	1%	2%
Attend operas/classical music events	1%	2%
Other	0%	1%

# ENTERTAINMENT ACTIVITIES\*

Entertainment Activities	2020	2021
Amusement/theme parks	2%	2%
Outdoor fun centers	3%	2%
Bars/nightlife	3%	2%
Animal parks/zoos	2%	1%
Children's museums	1%	1%
Water parks	2%	1%
Summer camps	1%	1%
Agricultural fairs	1%	1%
Horseback riding	1%	1%
Attend sporting events	1%	1%
Other	1%	4%

# OTHER STATES/PROVINCES VISITED\*

Other States/Provinces Visited	2020	2021
No other states/provinces	77%	75%
New Hampshire	13%	14%
Massachusetts	8%	12%
New York	3%	6%
Vermont	4%	5%
Connecticut	2%	4%
Rhode Island	3%	3%
New Brunswick	1%	1%
Nova Scotia	1%	1%
Ontario	1%	1%
Quebec	1%	1%
Newfoundland and Labrador	0%	0%
Prince Edward Island	1%	0%
Other	1%	2%

# TRAVELING IN MAINE\*

Maine Regions Visited	2020	2021
No other regions	41%	45%
Greater Portland & Casco Bay	26%	34%
The Maine Beaches	19%	29%
Downeast & Acadia	19%	27%
Midcoast & Islands	13%	27%
The Maine Highlands	11%	18%
Maine Lakes & Mountains	9%	12%
Kennebec Valley	7%	11%
Aroostook County	6%	10%
Other	1%	1%

# TRIP PLANNING CYCLE : POST-TRIP EVALUATION



# RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2020	2021
Would recommend Maine	98%	97%
Would not recommend Maine	1%	1%
Not sure	1%	2%

Recommending Regions	2020	2021
Definitely recommend region	85%	80%
Probably would recommend region	12%	14%
Would not recommend region	1%	1%
Not sure	3%	5%



# RETURNING TO MAINE

Returning to Maine	2020	2021
Definitely will return	82%	77%
Probably will return	15%	17%
Probably will not return	1%	1%
Not sure	2%	5%

# STUDY METHODS



# METHODOLOGY



## Visitor Tracking

4,805 interviews were completed with visitors to the state of Maine online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1<sup>st</sup>, 2020 and November 30<sup>th</sup>, 2021.

## Economic Impact

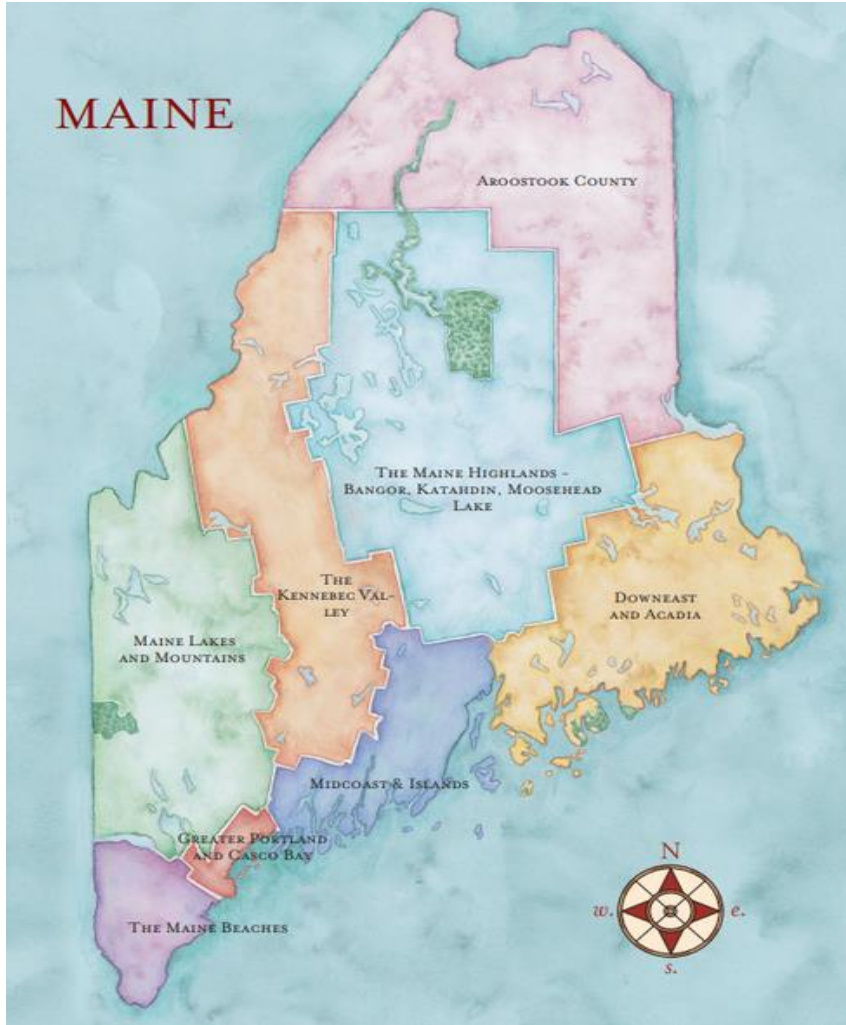
Total economic impact of tourism on the state of Maine is a function of direct spending by visitors to Maine, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

## Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to Maine. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Maine's multiplier is 1.87.



# METHODOLOGY



Quotas by Region	Winter	Summer	Fall	2021
Aroostook County	75	75	75	225
Kennebec Valley	125	100	75	300
The Maine Highlands	125	100	100	325
Maine Lakes & Mountains	125	100	100	325
Downeast & Acadia	125	325	200	650
Mid-Coast	125	325	200	650
Greater Portland & Casco Bay	125	325	200	650
Maine Beaches	125	450	300	875
<b>Total</b>	<b>950</b>	<b>1,800</b>	<b>1,250</b>	<b>4,000</b>

# MAINE OFFICE OF TOURISM

## 2021 Economic Impact & Visitor Tracking Report

DECEMBER 2020 – NOVEMBER 2021

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