

MIDCOAST & ISLANDS

2024 Economic Impact & Visitor Tracking Report
DECEMBER 2023 – NOVEMBER 2024

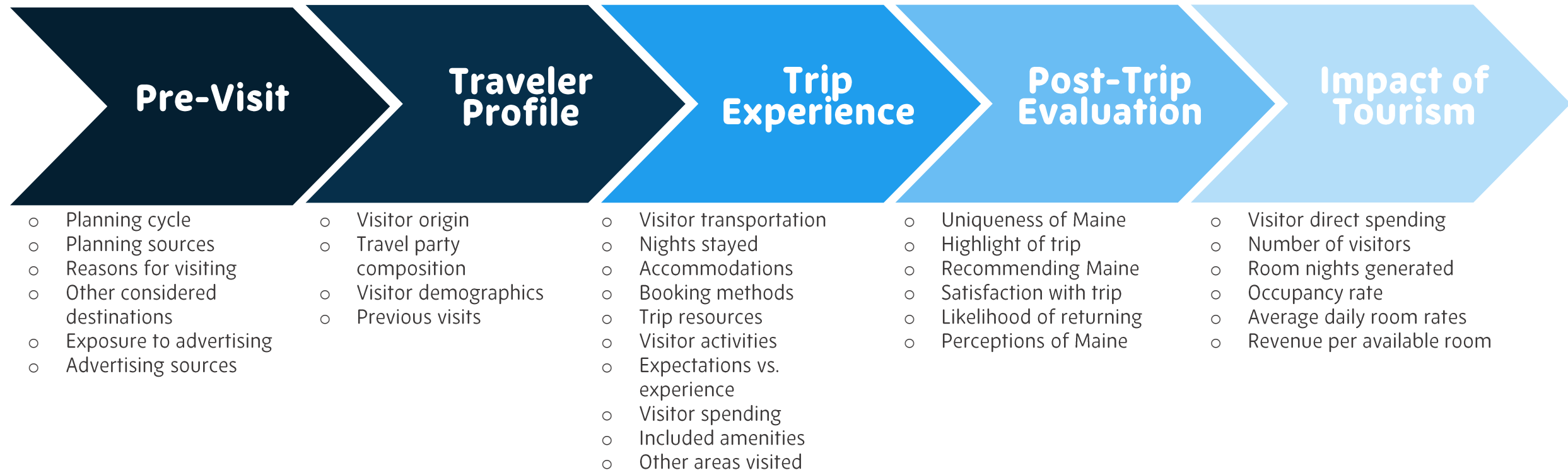


STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Maine from December 2023 to November 2024.

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.



EXECUTIVE SUMMARY



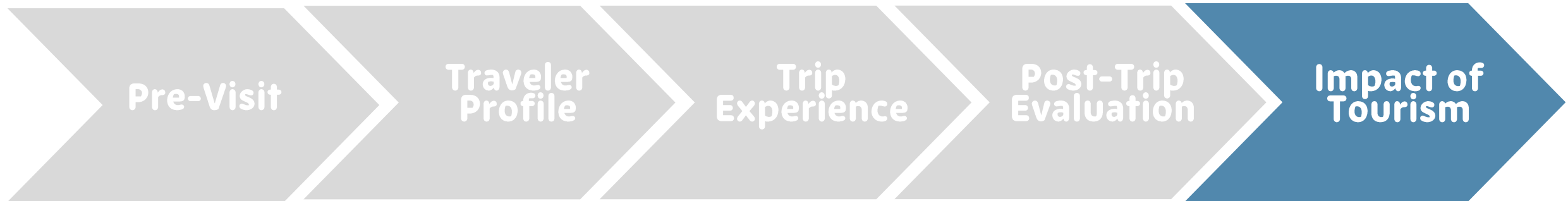
MIDCOAST & ISLANDS

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

- » Rely on advice from friends and family to help plan their trips
- » Come to Maine's Midcoast and Islands from elsewhere in the state and primarily to visit friends and family
- » Consider visiting other states and provinces before choosing Maine
- » Recall seeing advertising for Maine on social media



VISITOR JOURNEY: IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,604,152,800

in economic impact to Midcoast & Islands'
economy, down 4.5% from 2023



DIRECT SPENDING

Visitors to Midcoast & Islands spent

\$1,103,874,500

throughout the area in 2024 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, down 0.8% from 2023



VISITORS*

Midcoast & Islands attracted

1,942,800

visitors in 2024, down 5.5% from 2023



*There were fewer visitors staying in second homes or with friends/relatives in 2024 resulting in fewer visitors overall.

Midcoast & Islands

VISITORS DAYS*

All visitors to Midcoast & Islands spent

9,064,500

days in Midcoast & Islands throughout 2024,
down 10.1% from 2023



*Visitor days is the total number of days spent by visitors in the state of Maine. This includes overnight visitors and day trippers.

Midcoast & Islands

ROOM NIGHTS

Visitors to Midcoast & Islands generated

1,623,600

nights in Midcoast & Islands accommodations
throughout 2024, down 11.8% from 2023



JOBS SUPPORTED

Visitors to Midcoast & Islands supported

13,100

jobs throughout the area in 2024, down 2.2%
from 2023*



*2023 figure has been updated due to revised IMPLAN models.

WAGES GENERATED

Visitors to Midcoast & Islands supported

\$527,100,900

in wages paid to Midcoast & Islands
employees in 2024, down 0.4% from 2023*



*2023 figure has been updated due to revised IMPLAN models.

VISITORS & JOBS

Every
148

visitors supports a new job in Midcoast & Islands



HOUSEHOLD SAVINGS

Visitors to Midcoast & Islands saved local households

\$2,339

in state and local taxes in 2024



LODGING METRICS*

Occupancy Rate

53.0%

- 7.3% from 2023

Average Daily Rate

\$182.37

+ 2.3% from 2023

Revenue per Available Room

\$96.71

- 5.2% from 2023

*Lodging metrics include all paid accommodation types like hotels, vacation rentals, B&B, etc.
Sources: Key Data & STR.

Midcoast & Islands

VISITOR JOURNEY: PRE-VISIT

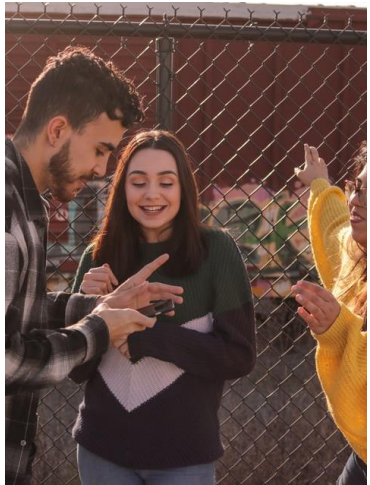


TRIP PLANNING CYCLE

- » 72% of visitors started planning their trip a month or more in advance of their trip
- » 69% of visitors have a booking window of less than 3 months



TOP TRIP PLANNING SOURCES*



84% Advice from family/friends



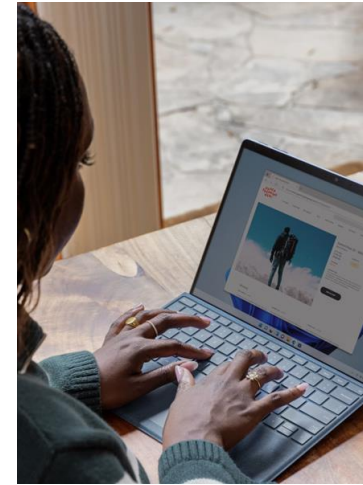
50% Online search engines



34% Facebook



27% Hotel websites



24% Articles or travelogues



24% Online travel agency

TOP REASONS FOR VISITING*



54% Visit friends/relatives



25% Special Occasion



25% Shopping



23% Relax and unwind

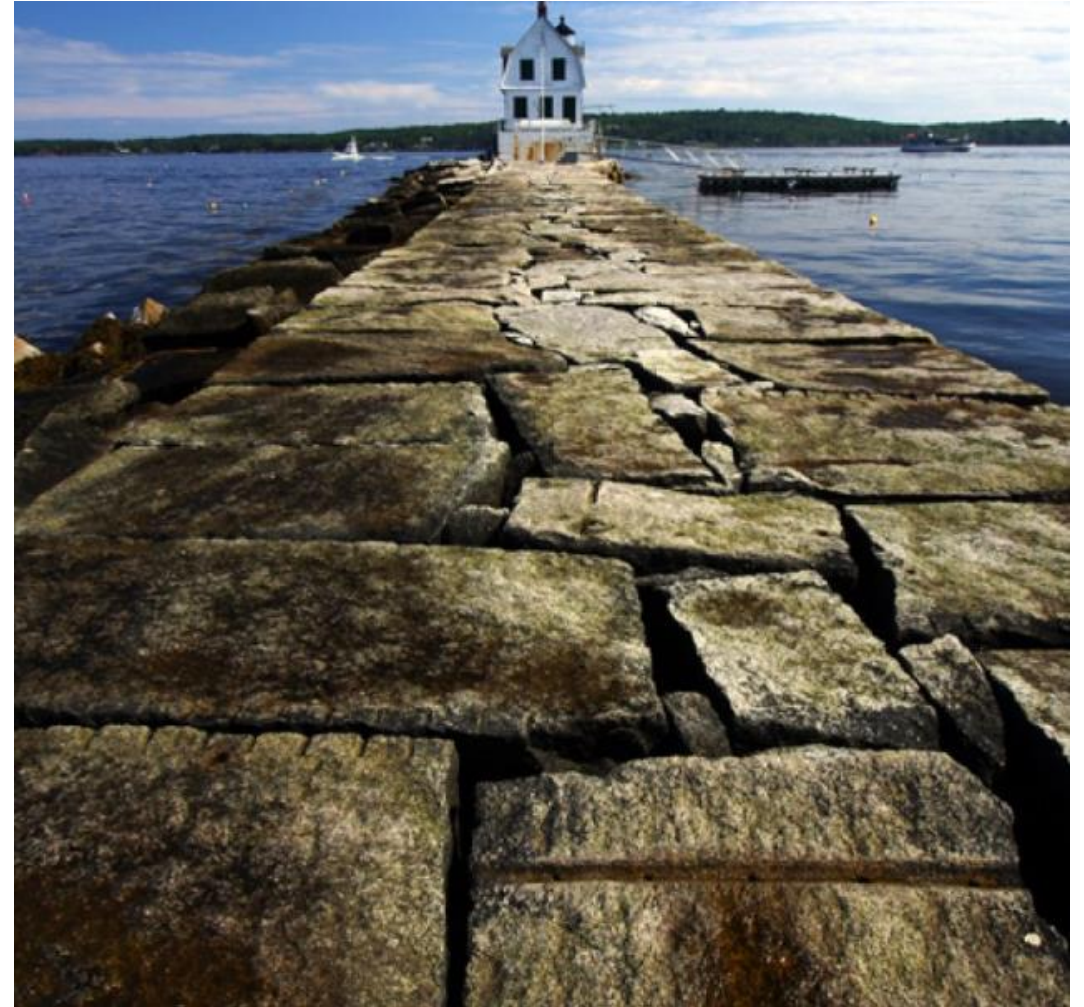
CONSIDERING MAINE AS A DESTINATION

- » Like last year, over **half** of visitors considered visiting **ONLY** Maine while planning their trips
- » **3 in 10** visitors considered visiting New Hampshire while planning their trips



TV SHOWS & FILM

- » 3% of visitors said a TV show or film inspired their trip to Maine
- » 59% of visitors who were inspired by a TV show or film said visiting a location of a TV show or film was one of the activities they engaged in while in Maine



PRE-TRIP RECALL OF ADVERTISING

- » Nearly **3 in 5** visitors recalled advertising or promotions for Maine prior to their trip (**-7%** points from 2023)
- » This information influenced **32% of all** visitors to visit Maine (**-8%** points from 2023)



TOP SOURCES OF ADVERTISING RECALL*

Base: 59% of visitors who recalled advertising



66% Social media



33% Magazine

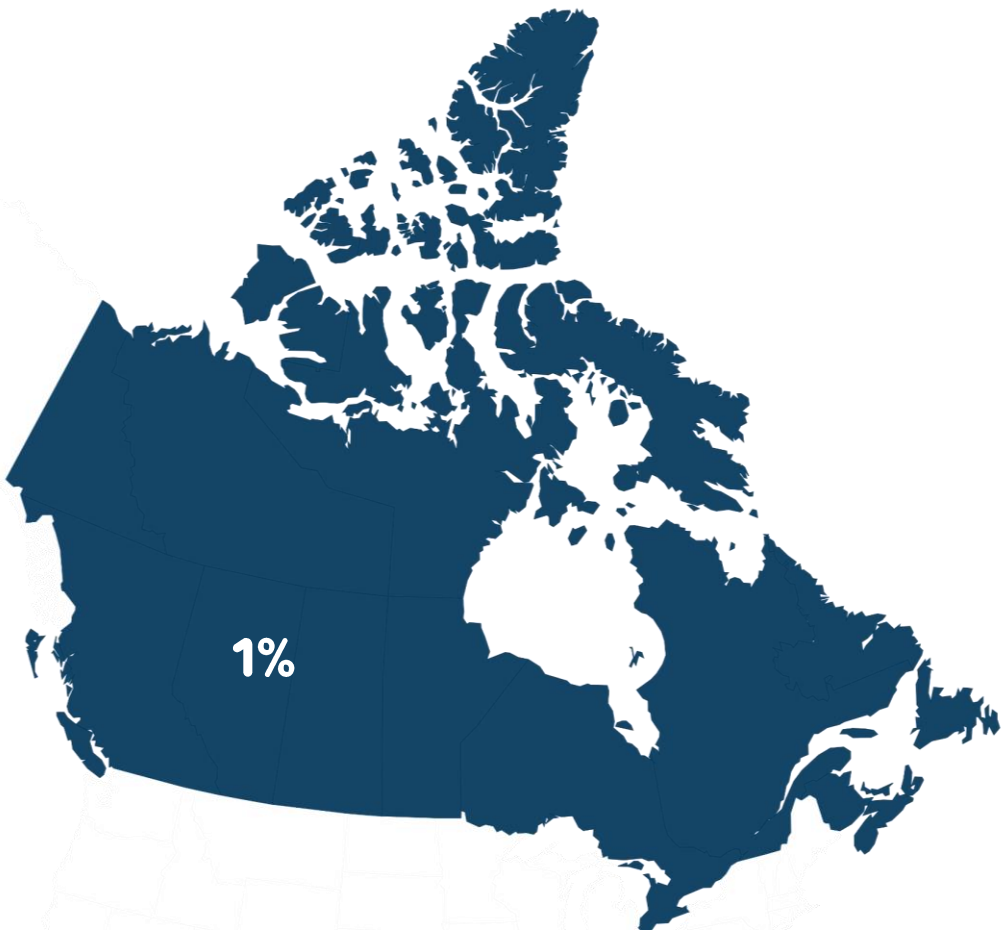
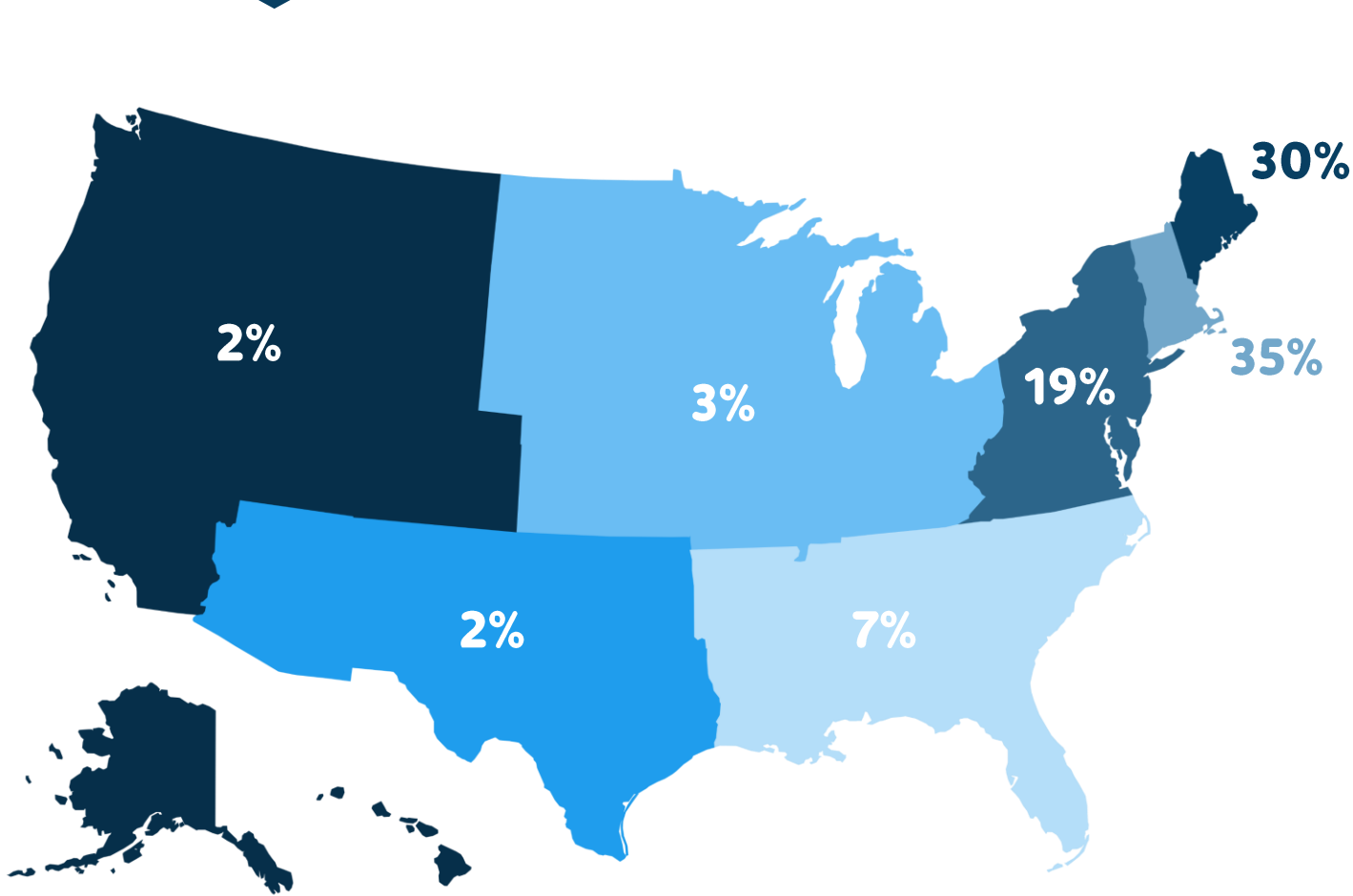


25% Internet

VISITOR JOURNEY: TRAVELER PROFILE



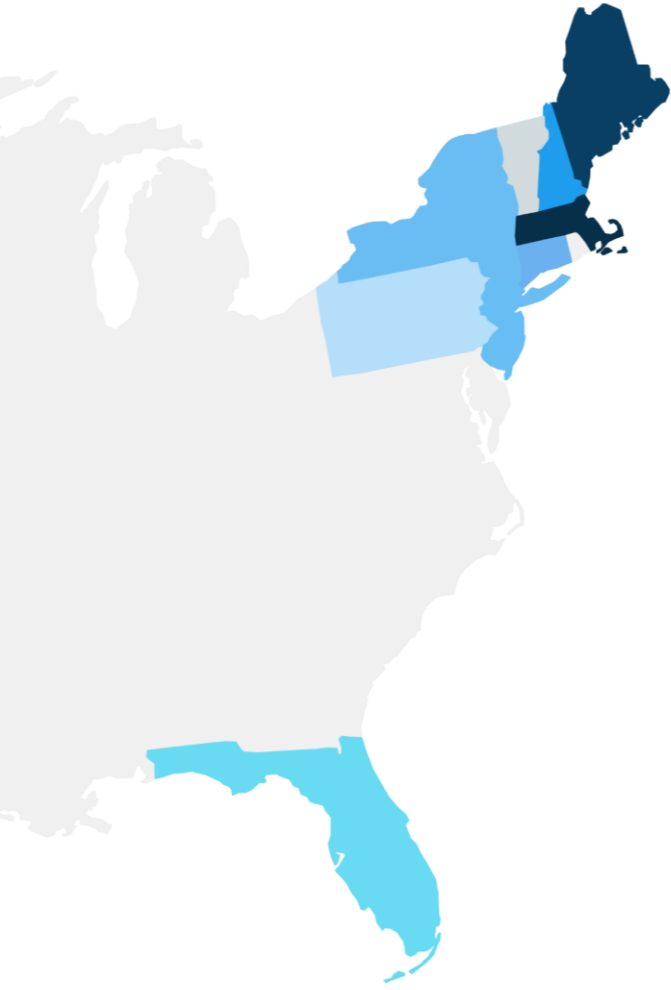
REGIONS OF ORIGIN



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

1% of visitors came from Canada.

TOP ORIGIN STATES & PROVINCES



79%

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

30	% Maine	6	% New York
17	% Massachusetts	4	% New Jersey
8	% New Hampshire	4	% Florida
7	% Connecticut	3	% Pennsylvania

Midcoast & Islands

26

TOP ORIGIN MARKETS



11% Boston



7% New York City¹



5% Portland

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

Midcoast & Islands

TRAVEL PARTIES

The typical Maine visitor traveled with **2.9** people in their visitor party



15% of visitors traveled with at least one person under the age of 18 in their travel party



VISITOR PROFILE

» The typical Maine visitor:

- » Is 52 years old¹
- » Is white – 89%
- » Is a college graduate – 87%
- » Is married/in a domestic partnership – 75%
- » Is employed full-time – 53%
- » Has an annual household income² of \$84,400



¹Median age.

²Median household income.

NEW & RETURNING VISITORS

- » 11% of visitors were traveling in Maine for the first time (-4% points from 2023)
- » Maine has high repeat and loyal visitors, as 28% had previously traveled in Maine more than 10 times (+3% points from 2023)



VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

- » Maine is a drive-market for most visitors, with **86%** choosing to travel by car over plane, motor coach/bus, or train



NIGHTS STAYED

- » Like last year, **89%** of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed **4.6*** nights in Maine on their trips



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

Midcoast & Islands

TOP ACCOMMODATIONS



35% Hotel/motel/resort



22% Friends/family home



12% Vacation rental home



11% Not spending the night

TOP IN-MARKET VISITOR RESOURCES*



65% Restaurant website/app



45% Navigation website/apps (i.e., Google or Apple Maps, etc.)



37% Personal social media

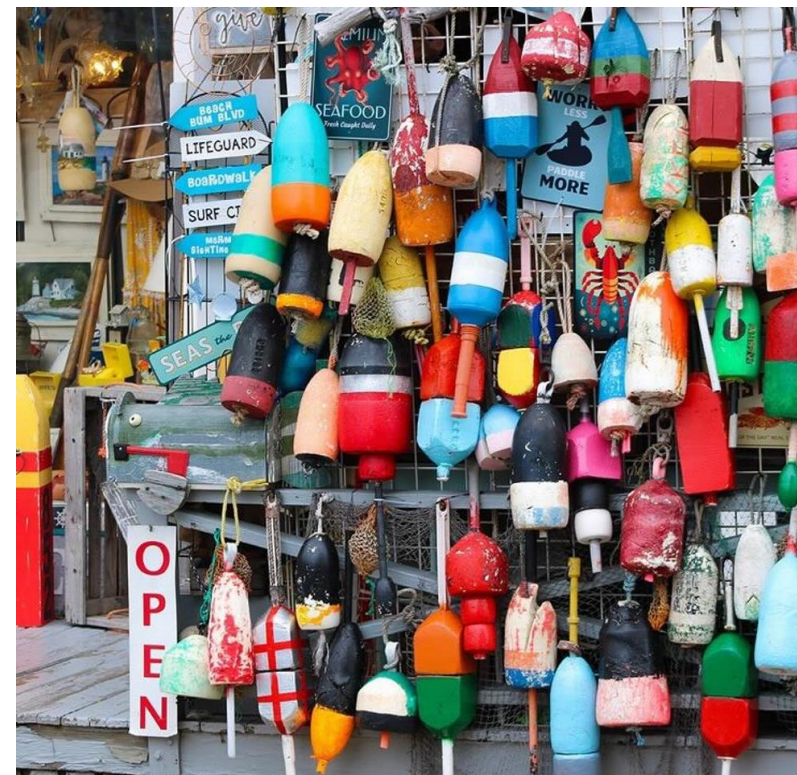
TOP VISITOR ACTIVITIES*



91% Food/beverage/culinary



66% Shopping



50% Entertainment/attractions

VISITING OTHER STATES & PROVINCES

- » Nearly **2 in 3** visitors did not visit any other U.S. state or Canadian province during their trip (+2% points from 2023)
- » Over **1 in 5** visitors also went to New Hampshire during their trip



TRAVELING WITHIN MAINE

- » Over **half** of visitors visited the Greater Portland & Casco Bay region in addition to their primary destination within Maine
- » Like last year, nearly **2 in 5** visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state



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
- » **99%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – like last year, **63%** would definitely recommend



LIKELIHOOD OF RETURNING TO MAINE

- » **91%** of visitors will return to Maine for a future visit or vacation (+3% points from 2023)
- » **66%** of visitors were highly satisfied with their trip in Maine and will “definitely return” in the future



SATISFACTION

- » 98% of visitors were satisfied with their trip to Maine
- » 54% were very satisfied with their trip to Maine



OVERCROWDING

- » 47% of visitors thought the number of visitors during their trip to Maine was fine (+3% points from 2023)
- » 30% of visitors thought it was a little overcrowded (-6% points from 2023)



DETAILED FINDINGS



VISITOR JOURNEY: IMPACT OF TOURISM



KEY PERFORMANCE INDICATORS

Economic Impact	2022	2023	2024	Δ% from '23
Number of Visitors	2,013,900	2,056,600	1,942,800	- 5.5%
Visitor Days*	9,832,100	10,082,600	9,064,500	- 10.1%
Room nights generated	1,624,200	1,841,000	1,623,600	- 11.8%
Direct expenditures	\$1,010,423,900	\$1,112,892,100	\$1,103,874,500	- 0.8%
Total economic impact	\$1,514,991,300	\$1,680,086,100	\$1,604,152,800	- 4.5%

*Visitor Days is the total number of days spent by visitors in the state of Maine. This include overnight visitors and day trippers.

EMPLOYMENT IMPACTS

Midcoast & Islands Jobs	2022	2023*	2024	Δ% from '23
Jobs supported (direct)	10,400	10,400	10,200	- 1.9%
Total jobs supported	13,250	13,400	13,100	- 2.2%

Midcoast & Islands Wages	2022	2023*	2024	Δ% from '23
Wages paid (direct)	\$376,441,800	\$379,301,900	\$377,829,100	- 0.4%
Total wages paid	\$507,800,200	\$529,225,500	\$527,100,900	- 0.4%

*2023 figures have been updated due to revised IMPLAN models.

RETURN ON INVESTMENT

Return on Investment	2022	2023*	2024
Visitors per job supported	152	153	148
State & local taxes supported	\$142,115,700	\$158,468,700	\$158,627,000
Tax savings per household	\$2,153	\$2,367	\$2,339

LODGING METRICS*

Lodging Metrics	2022	2023	2024	Δ% from '23
Occupancy Rate (%)	55.1%	57.2%	53.0%	- 7.3%
Average Daily Rate	\$169.98	\$178.25	\$182.37	+ 2.3%
RevPAR	\$93.66	\$102.00	\$96.71	- 5.2%
Total Lodging Revenue**	\$244,160,800	\$246,144,000	\$243,828,500	- 0.9%

*Lodging metrics include all paid accommodations type like hotels, vacation rentals, B&B, etc.
Sources: Key Data & STR.

**Source: State of Maine Revenue Services.

VISITOR JOURNEY : PRE-VISIT



TRIP PLANNING CYCLE

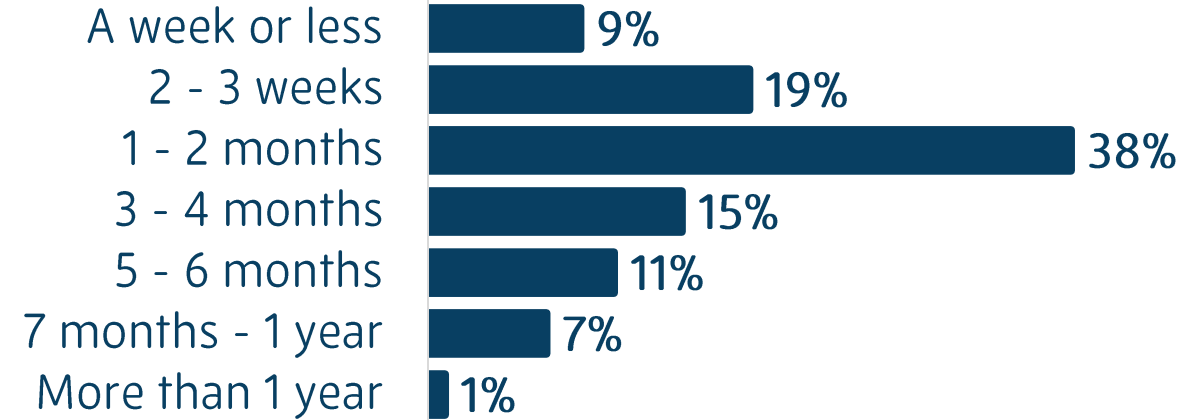
» Typical visitors began planning their trip **47 days** in advance (-8 days from 2023)

» **72%** of visitors started planning their trip a month or more in advance of their trip

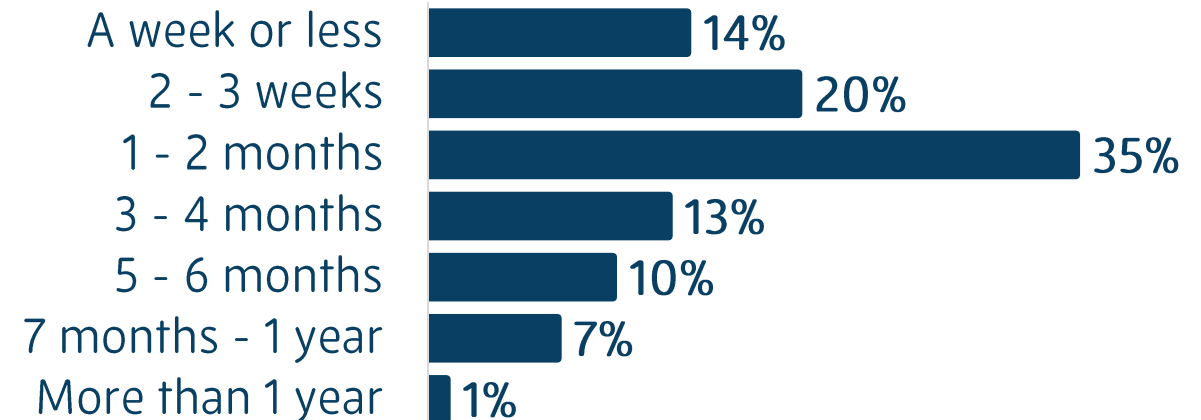
» Typical visitors booked their accommodations **44 days** in advance (-7 days from 2023)

» **69%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

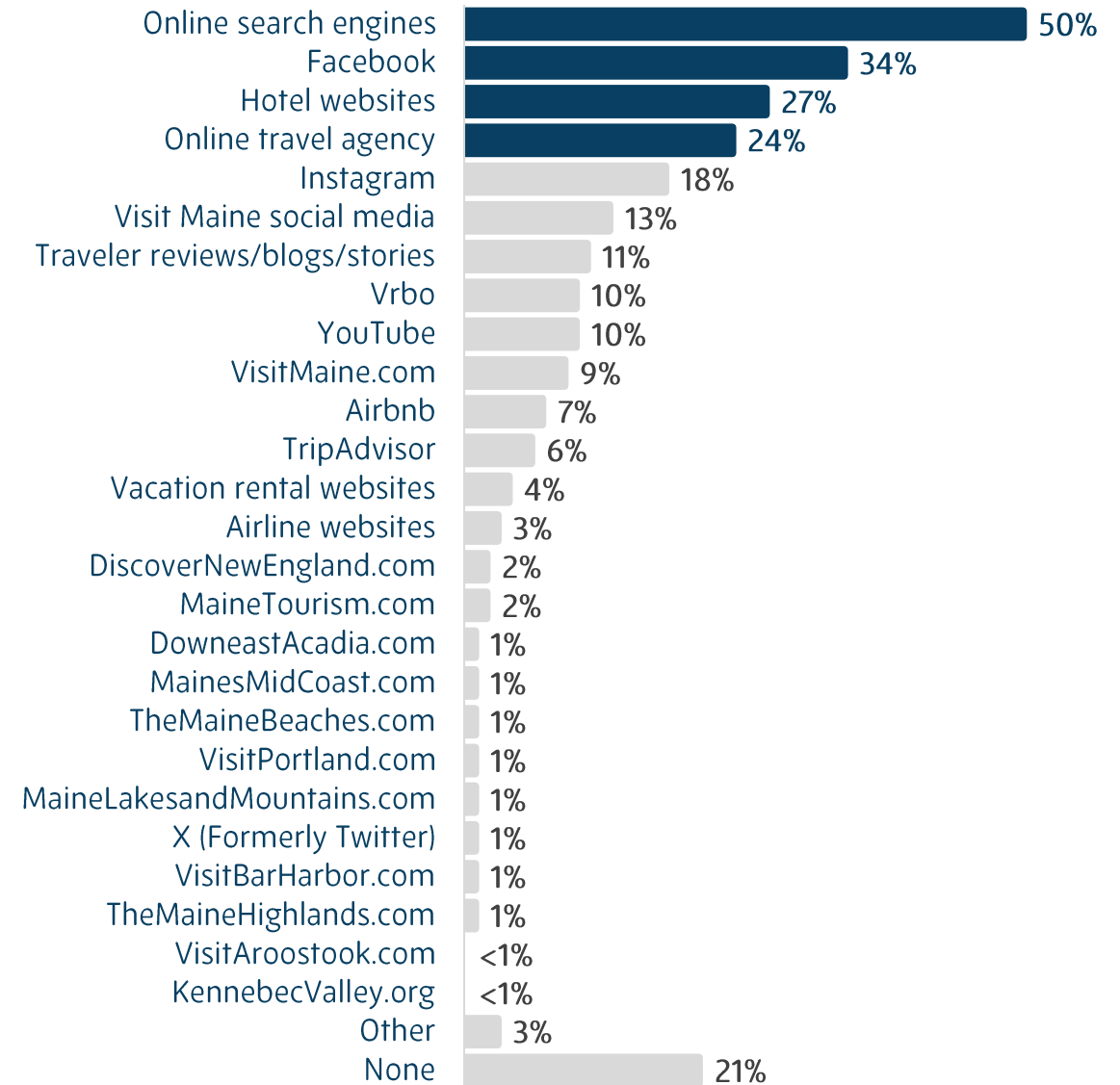


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

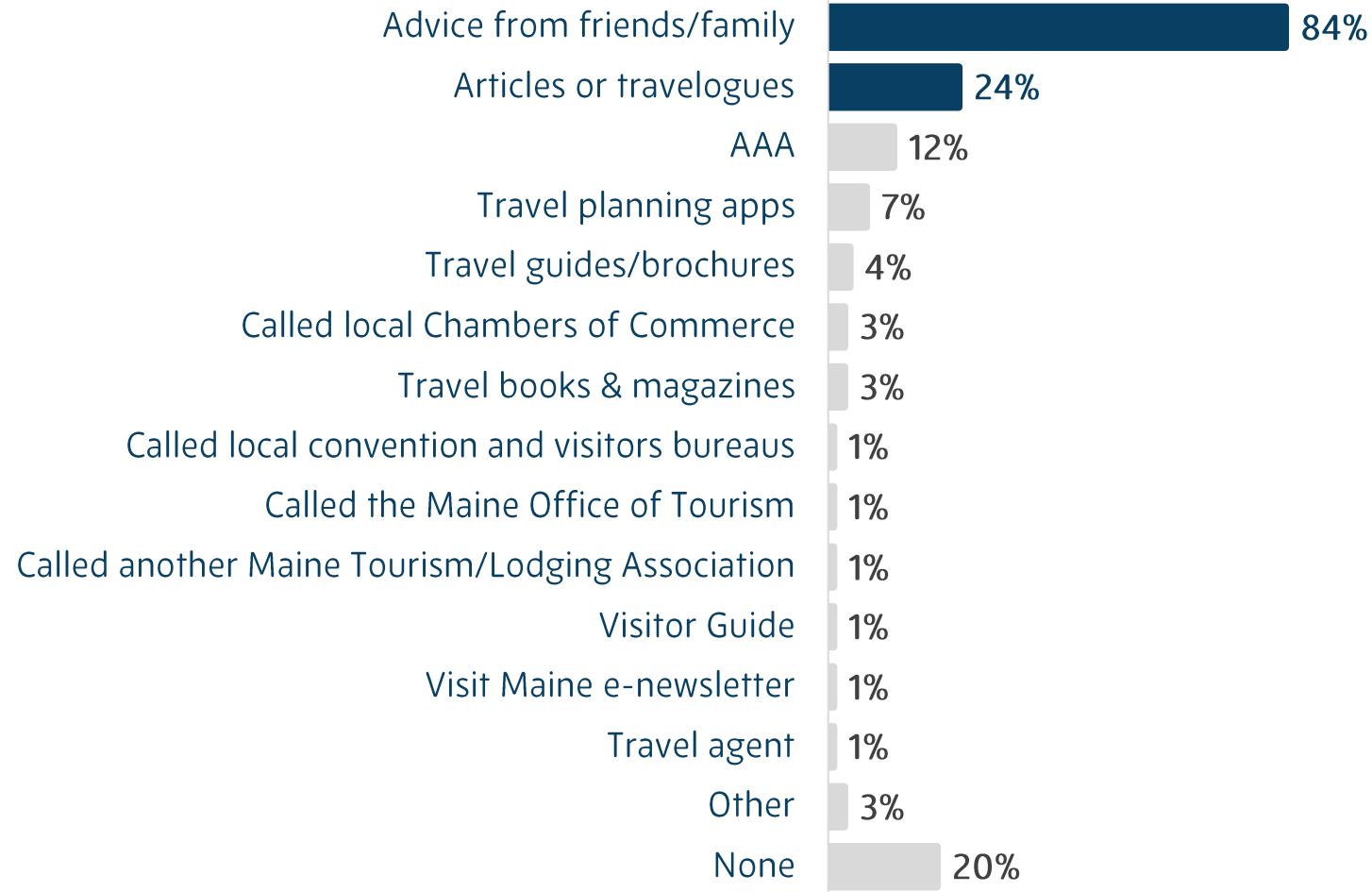
- » Nearly **4 in 5** visitors used one or more online resources to help them plan their trip in Maine
- » **Half** of visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » Over **1 in 3** visitors used Facebook (+5% points from 2023)
- » Around **1 in 4** used hotel websites or an online travel agency to plan their trip



*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

- » Over **4 in 5** visitors relied on advice from their friends and family to help them plan their trip in Maine (+12% points from 2023)
- » Nearly **1 in 4** visitors used articles or travelogues to help plan their trip in Maine (-11% points from 2023)
- » **1 in 5** visitors did not use any other resources to help them plan their trip



REASONS FOR VISITING*

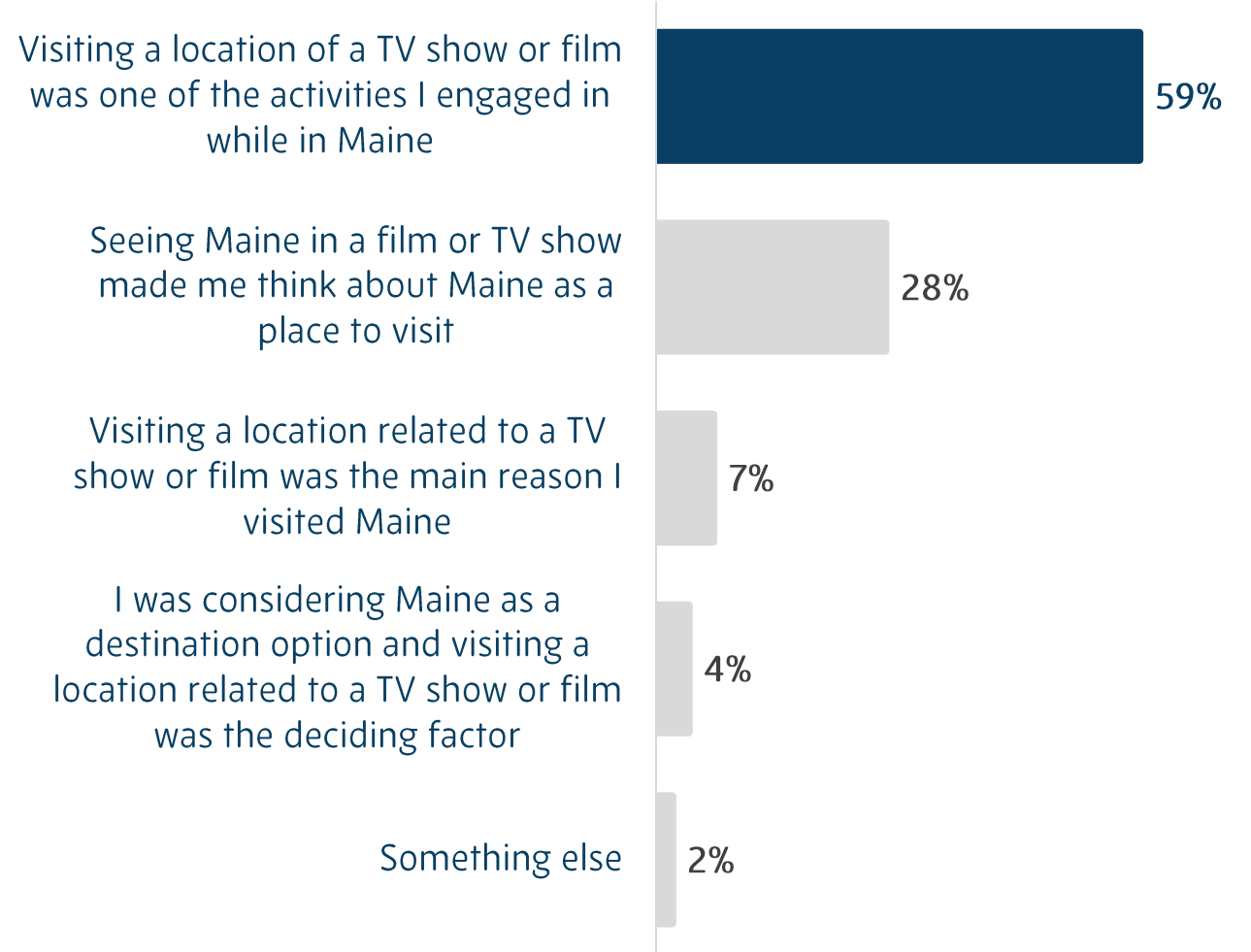
- » Over **half** of visitors came to Maine to visit friends and relatives (+8% points from 2023)
- » **1 in 4** visitors came to Maine for a special occasion or to shop
- » Another nearly **1 in 4** came to the state to relax and unwind



TV SHOWS & FILM

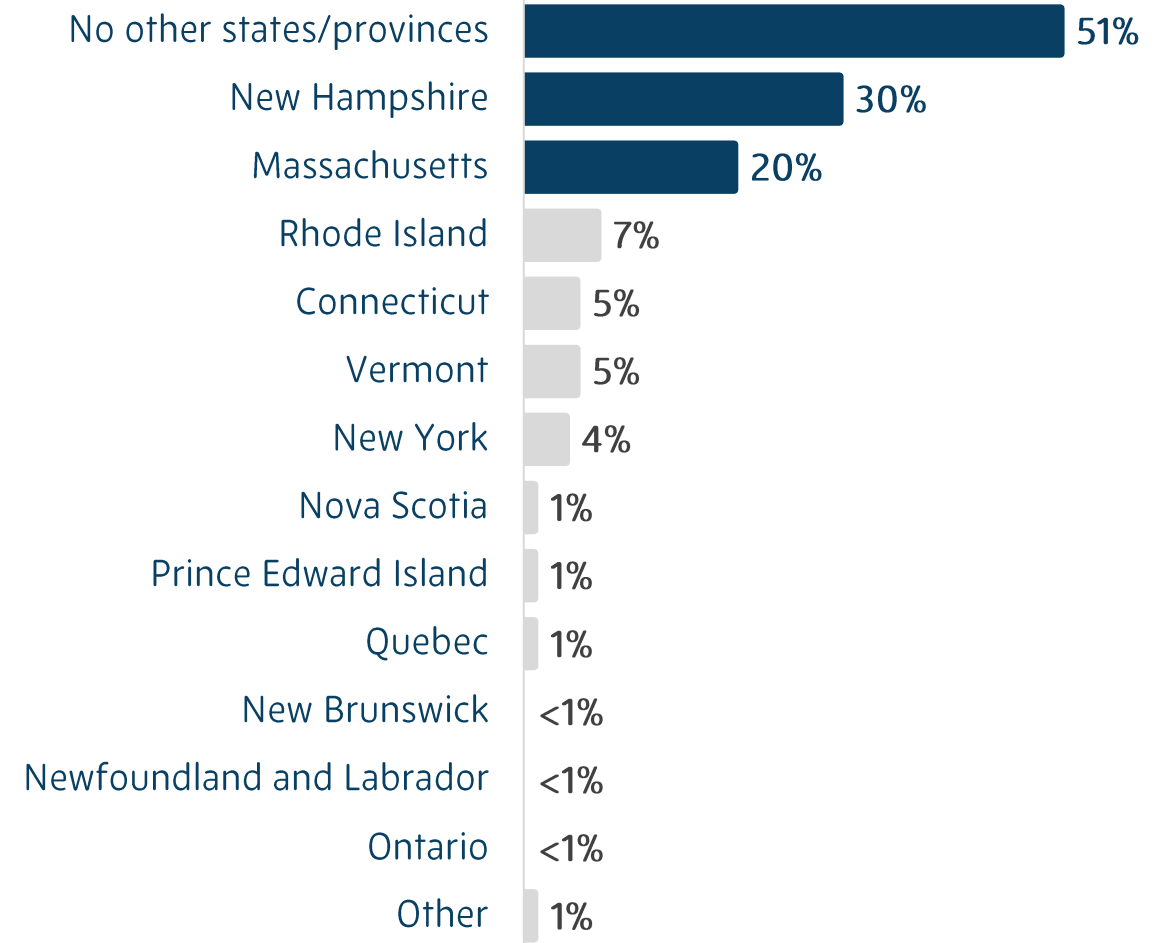
- » 3% of visitors said a TV show or film inspired their trip to Maine
- » 59% of visitors who were inspired by a TV show or film said they visited a related location while in Maine
- » 15% of visitors who were NOT inspired by a TV show or film to visit Maine said they visited the location of a TV show or film while in Maine

Base: 3% of visitors who were inspired by a TV show or film



OTHER STATES & PROVINCES CONSIDERED*

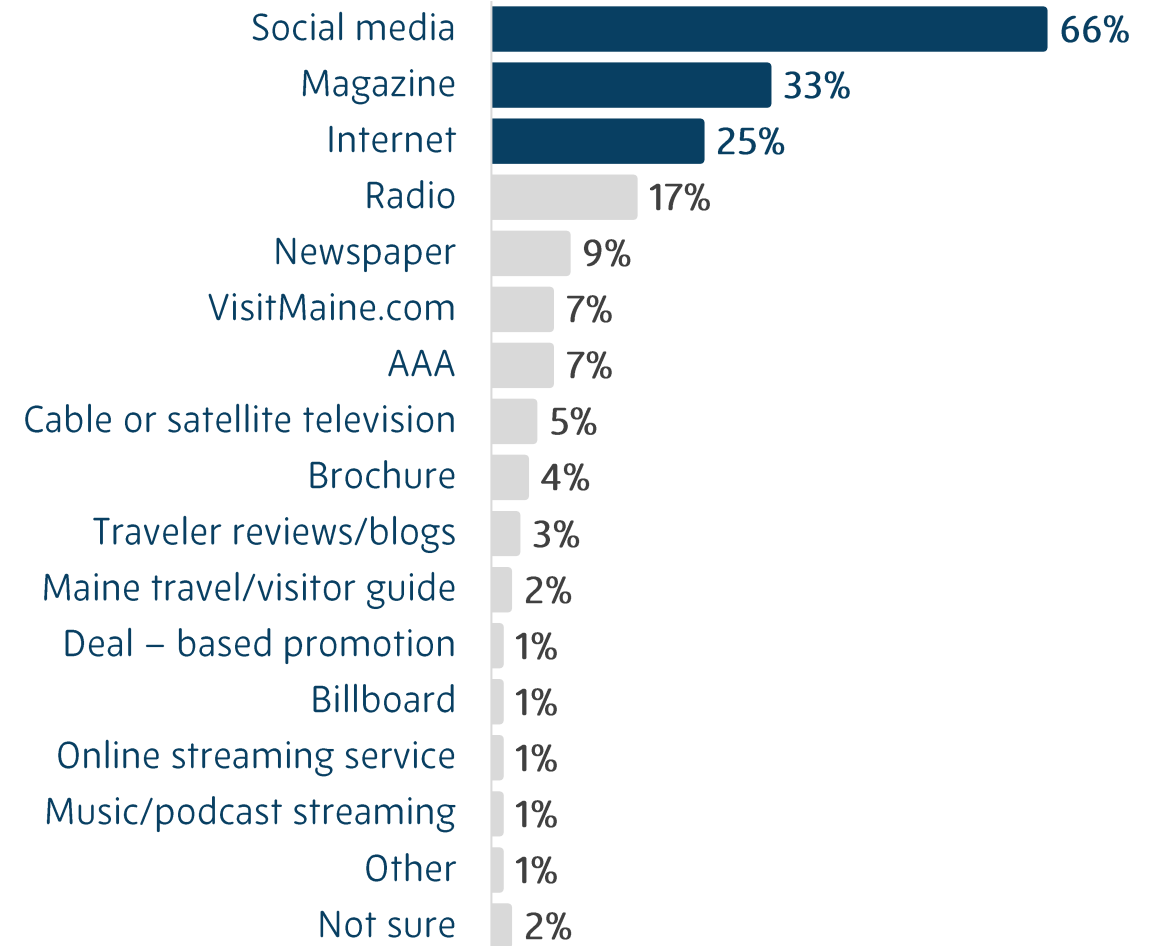
- » Like last year, over **half** of visitors considered visiting **ONLY** Maine while planning their trips
- » **3 in 10** visitors considered visiting New Hampshire while planning their trips
- » **1 in 5** considered visiting Massachusetts
- » Like last year, visitors were more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

- » Nearly **3 in 5** visitors recalled advertising or promotions for Maine prior to their trip (-7% points from 2023)
- » Visitors who recalled this advertising primarily saw it on social media (+10% points from 2023)
- » This information influenced **32% of all** visitors to visit Maine (-8% points from 2023)

Base: 59% of visitors who recalled advertising

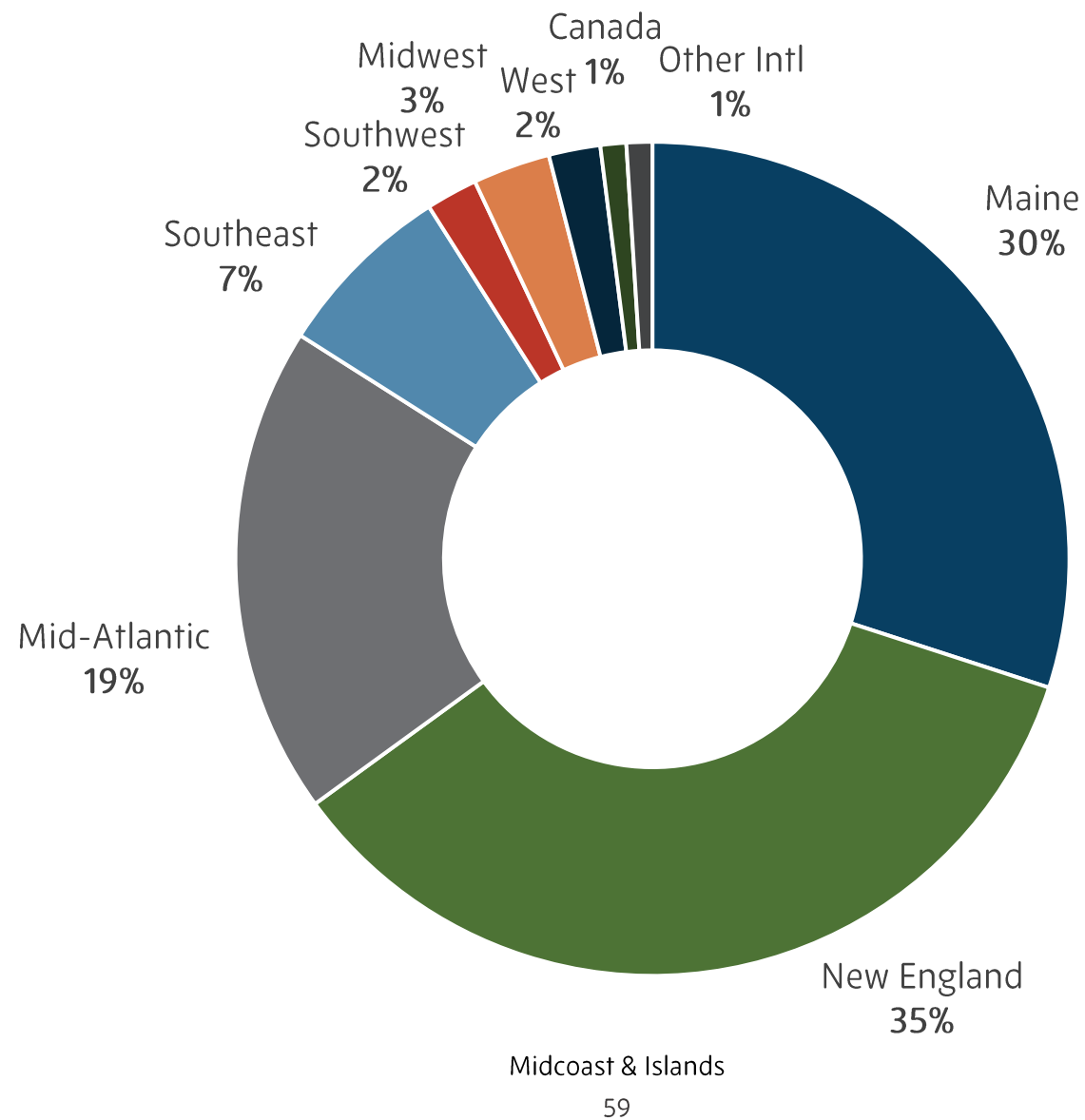


*Multiple responses permitted.

VISITOR JOURNEY : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **87%** of visitors traveled to/within Maine from **12** U.S. states and Canadian provinces
- » **3 in 10** visitors were residents of Maine traveling throughout the state

State	Percent
Maine	30%
Massachusetts	17%
New Hampshire	8%
Connecticut	7%
New York	6%
Florida	4%
New Jersey	4%
Pennsylvania	3%
Maryland	2%
Rhode Island	2%
Vermont	2%
Virginia	2%

TOP ORIGIN MARKETS

- » Over **2 in 5** visitors traveled from **10** U.S. markets
- » **18%** of visitors traveled to Maine from Boston or New York City

Market	Percent
Boston	11%
New York City ¹	7%
Portland	5%
Augusta	4%
Washington DC - Baltimore ²	3%
Belfast	3%
Waterville	3%
Auburn - Lewiston	3%
Providence, RI	2%
Manchester, NH	2%

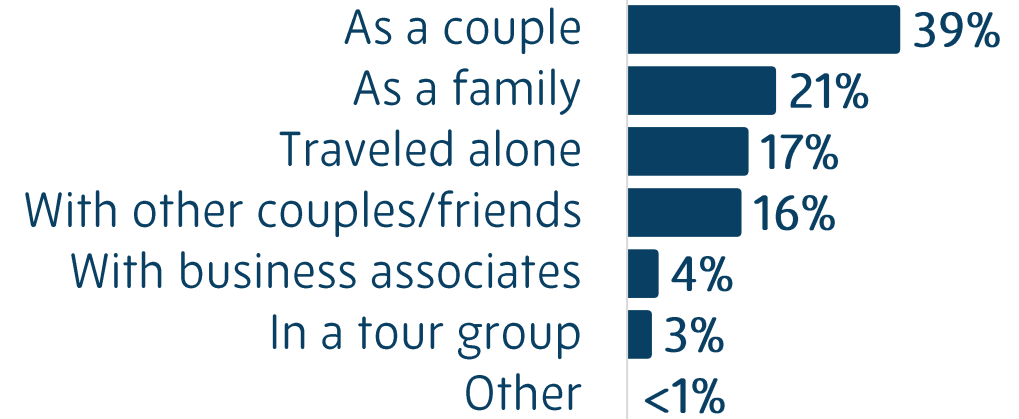
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

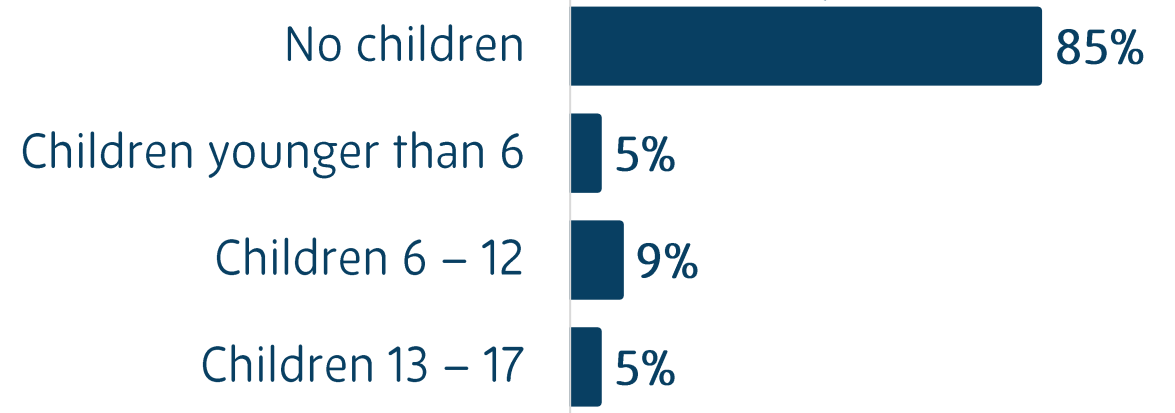
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.9** people
- » Nearly **2 in 5** visitors traveled as a couple (-7% points from 2023)
- » Over **1 in 5** traveled as a family
- » **15%** of visitors traveled with one or more children in their travel party

Travel Party Composition



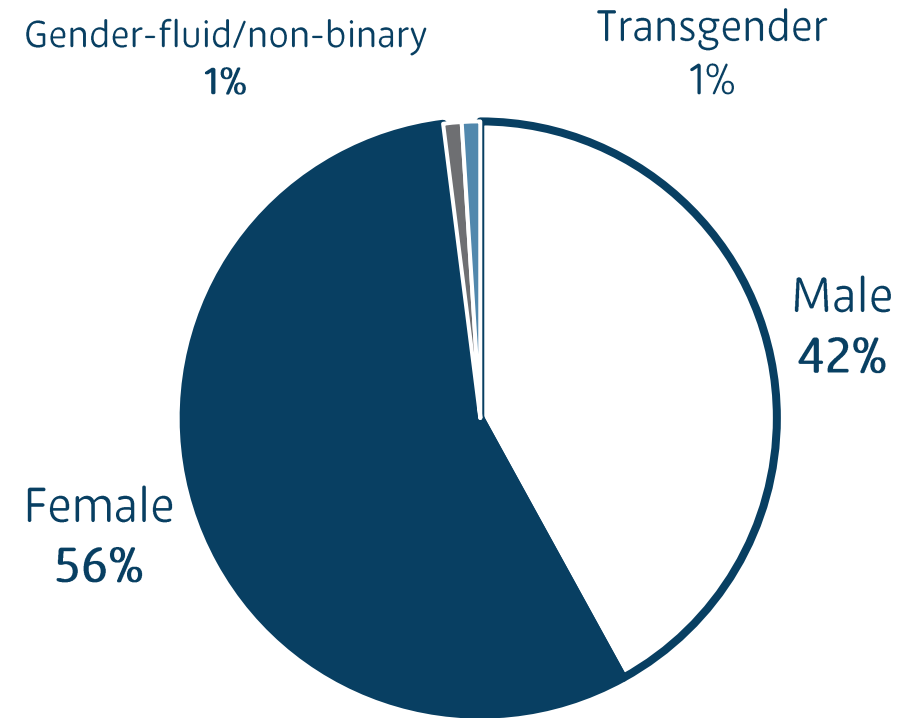
Children in Travel Party*



*Multiple responses permitted.

GENDER*

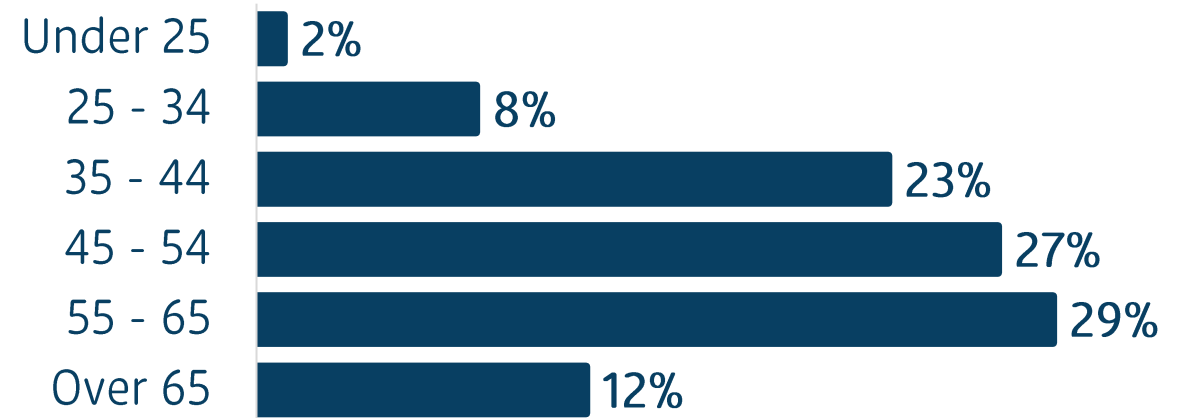
» Over **half** of visitors to Maine interviewed were females



*Gender of member of travel party surveyed. May be influenced by visitors' willingness to take a survey.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.
Midcoast & Islands

AGE*

» The median age of visitors to Maine is 52 years old



*Age of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Midcoast & Islands

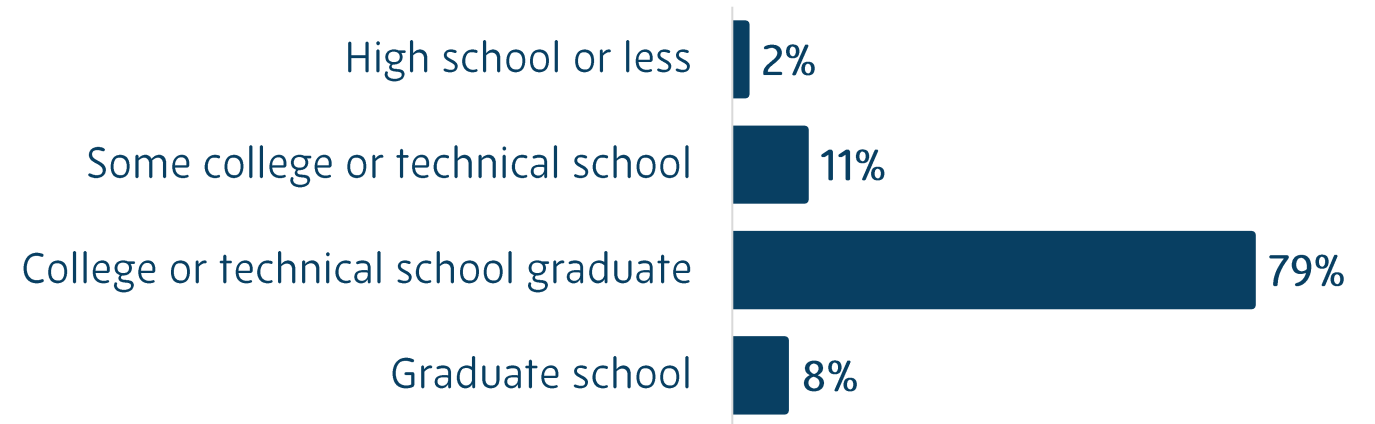
RACE & ETHNICITY*

» Nearly 9 in 10 visitors to Maine were white



EDUCATIONAL ATTAINMENT*

» Nearly **9 in 10** visitors have a college/technical school degree or higher



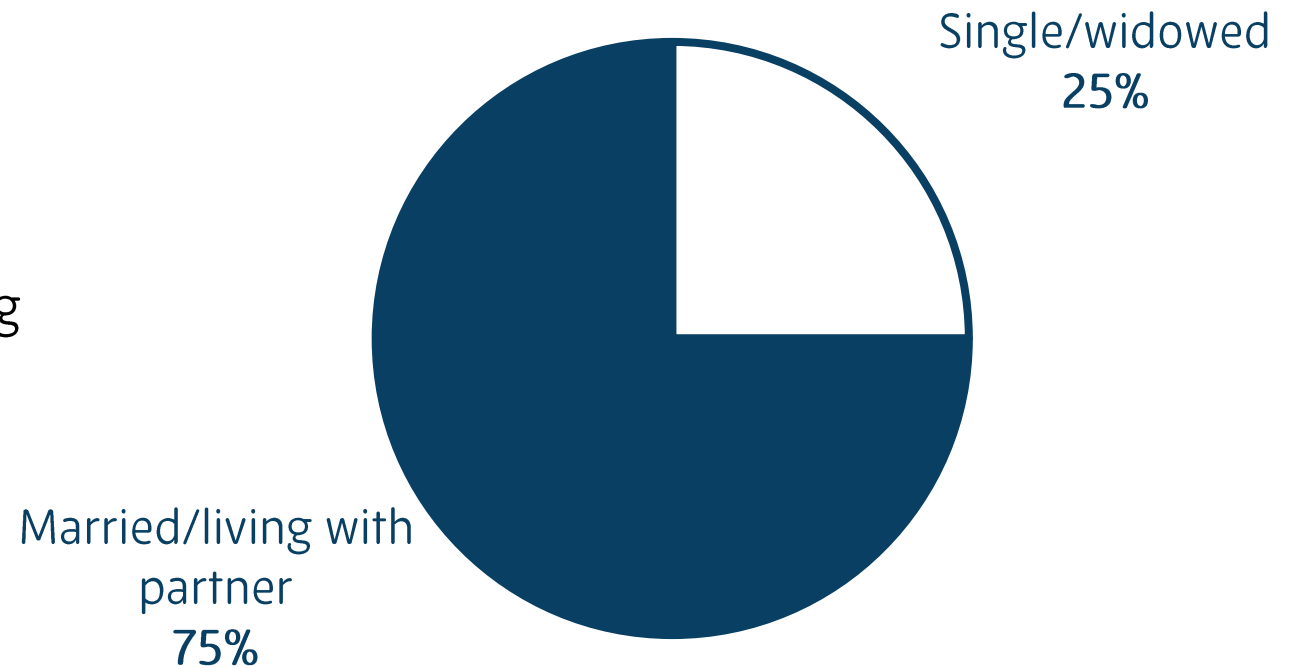
*Educational attainment of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Midcoast & Islands

MARITAL STATUS*

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



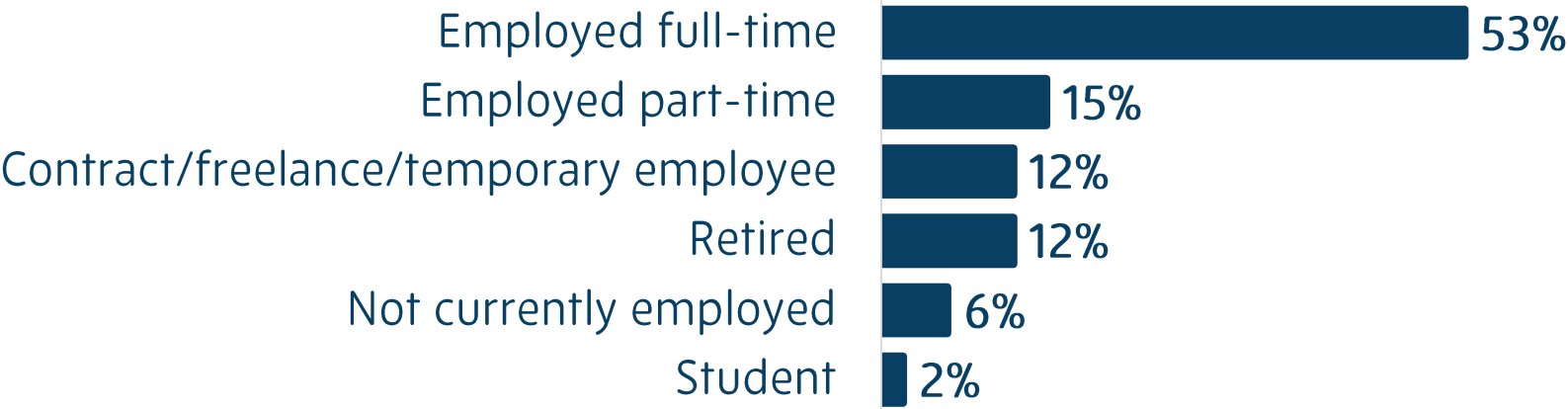
*Marital status of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Midcoast & Islands

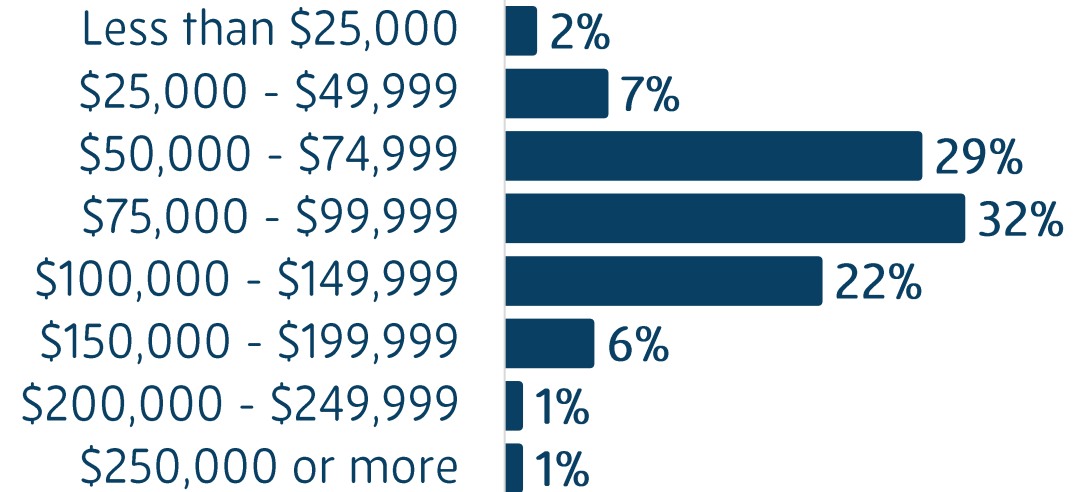
EMPLOYMENT STATUS*

» 4 in 5 visitors to Maine were employed, most full-time (+8% points from 2023)



HOUSEHOLD INCOME

- » The median household income of visitors to Maine is **\$84,400** per year
- » **8%** of visitors to Maine earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » **11%** of visitors were traveling in Maine for the first time (-4% points from 2023)
- » Maine has high repeat and loyal visitors, as **28%** had previously traveled in Maine more than 10 times (+3% points from 2023)

This is my first time



11%

2 - 5 times

29%

6 - 10 times

32%

11+ times

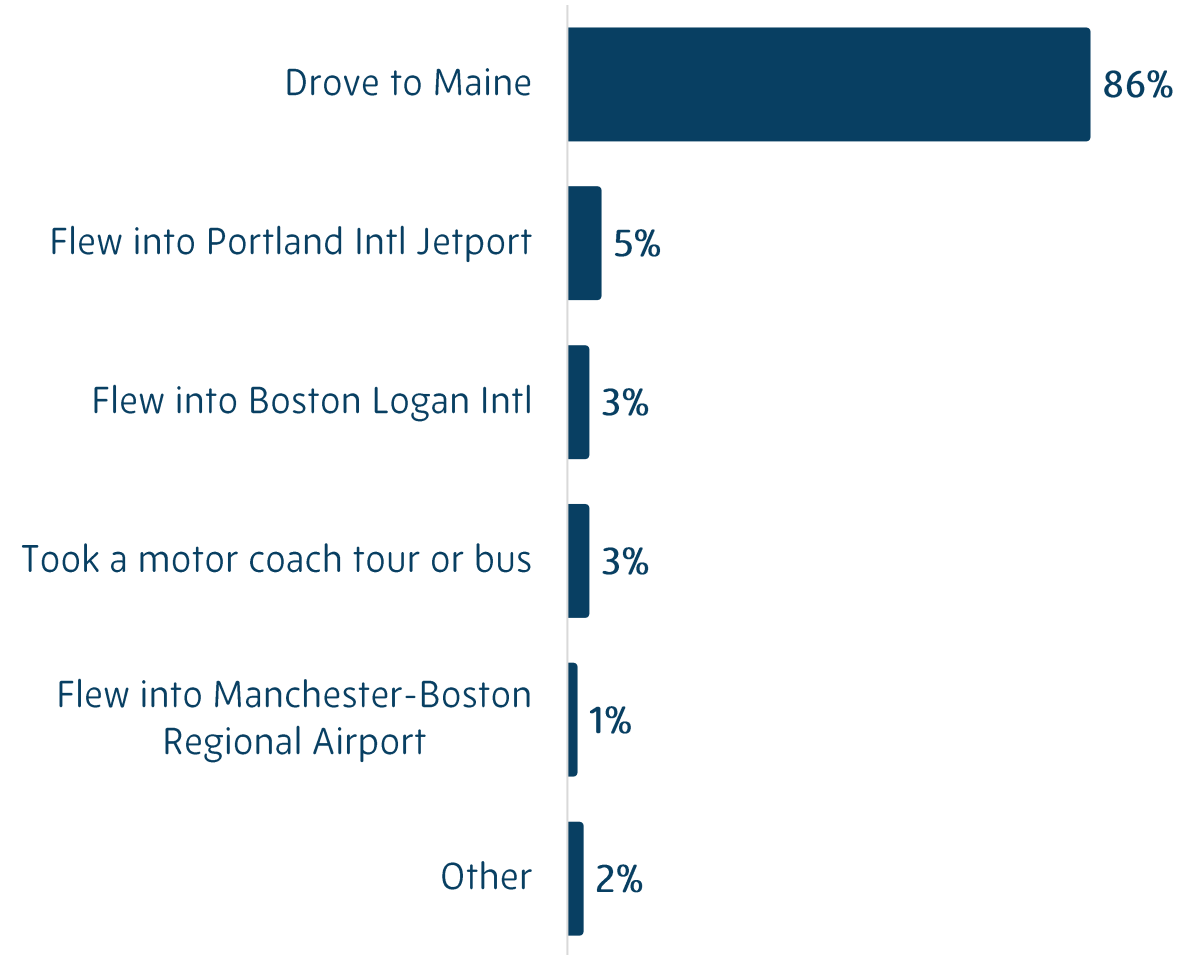
28%

VISITOR JOURNEY : TRIP EXPERIENCE



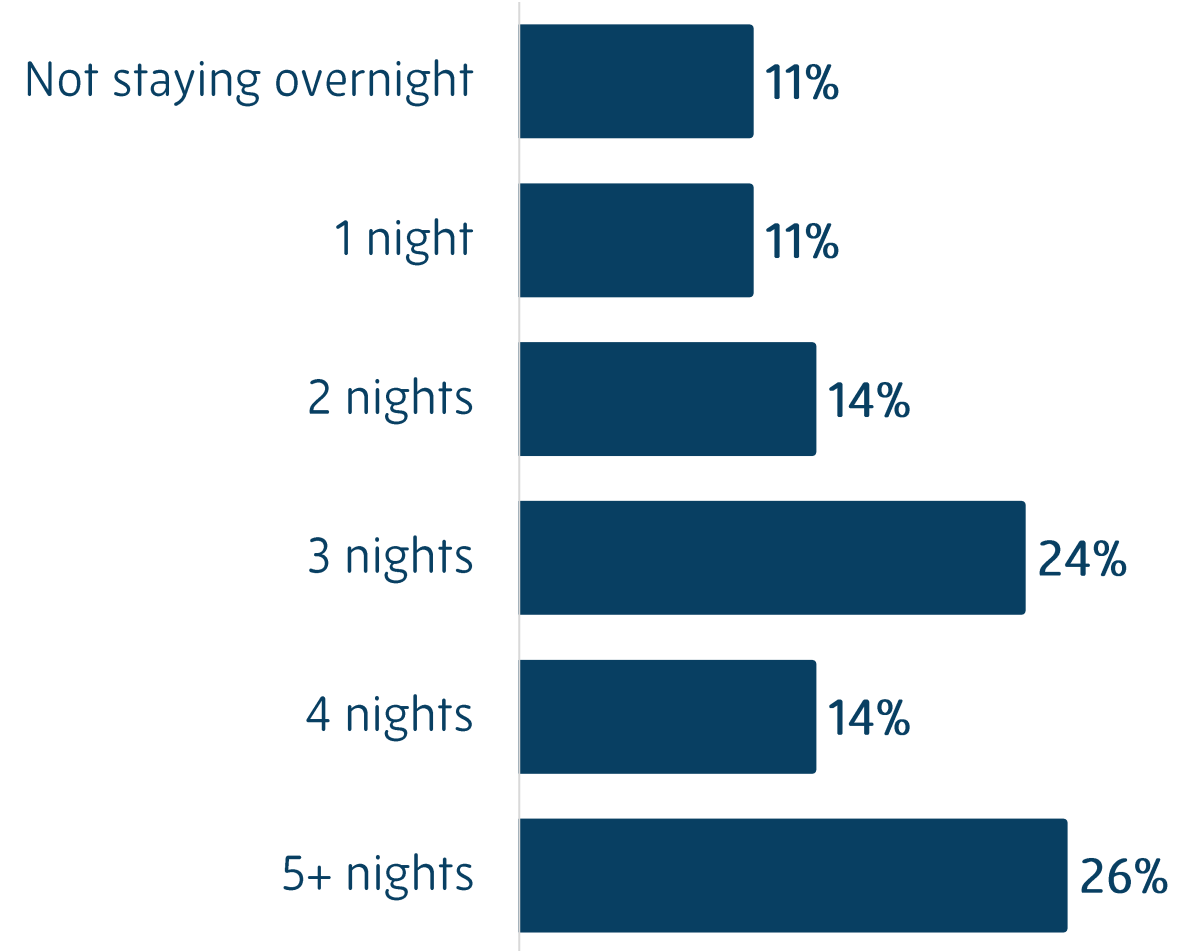
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **86%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport



NIGHTS STAYED

- » Like last year, **89%** of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed **4.6*** nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed **4.2** nights in Maine on their trips

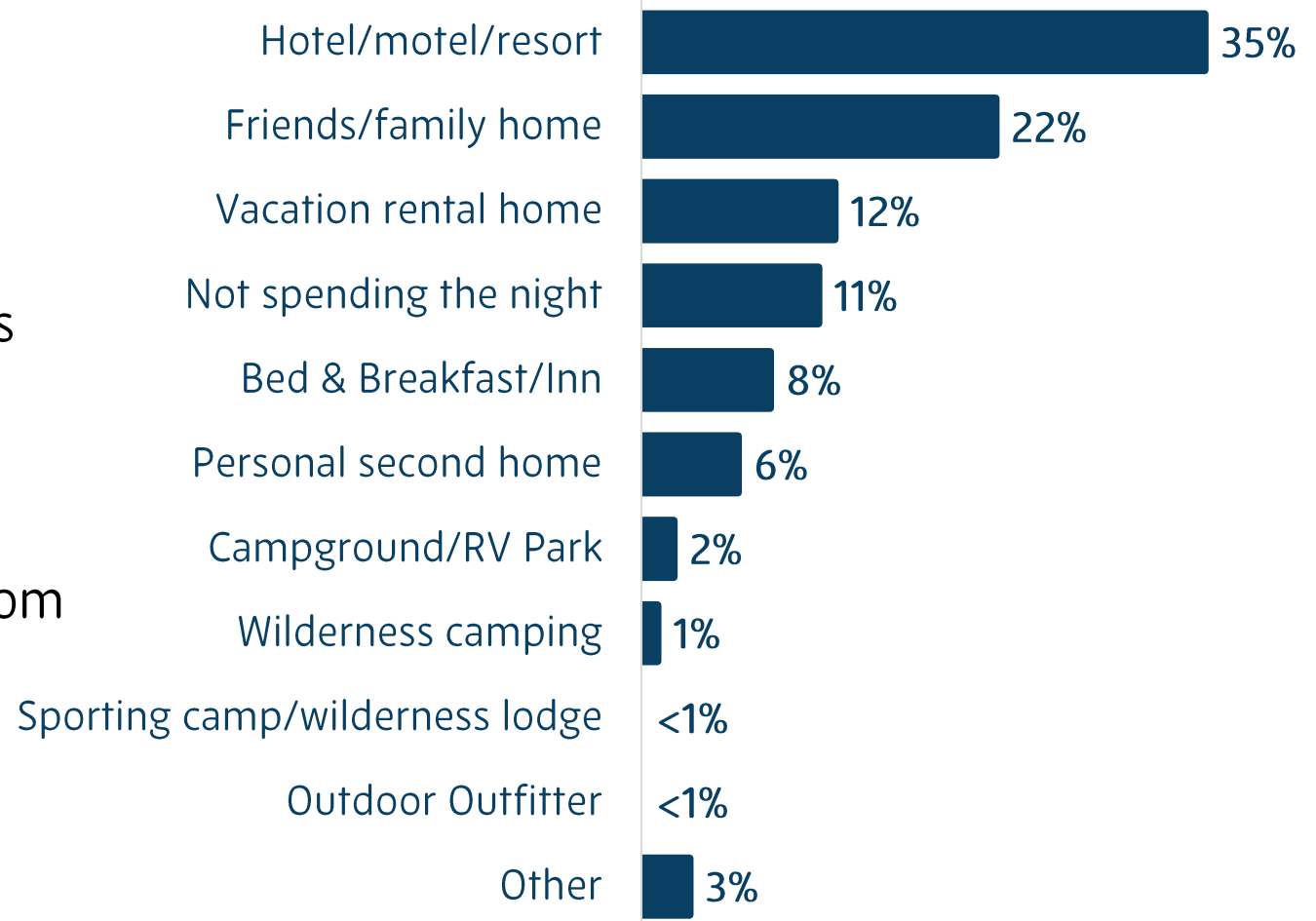


*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Midcoast & Islands

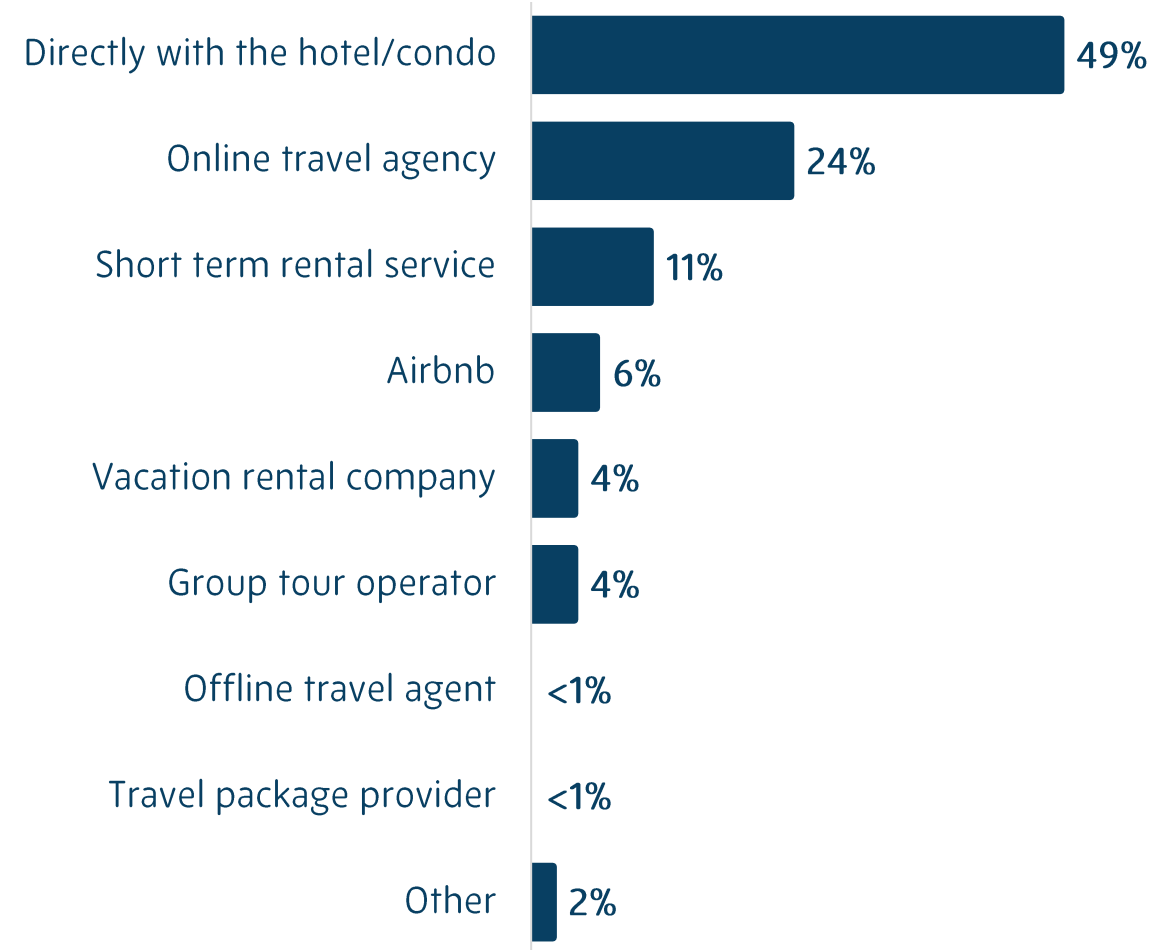
ACCOMMODATIONS

- » Over **1 in 3** visitors stayed in a hotel/motel/resort while in Maine (+3% points from 2023)
- » Over **1 in 5** visitors stayed with friends and relatives on their trip to Maine (+2% points from 2023)



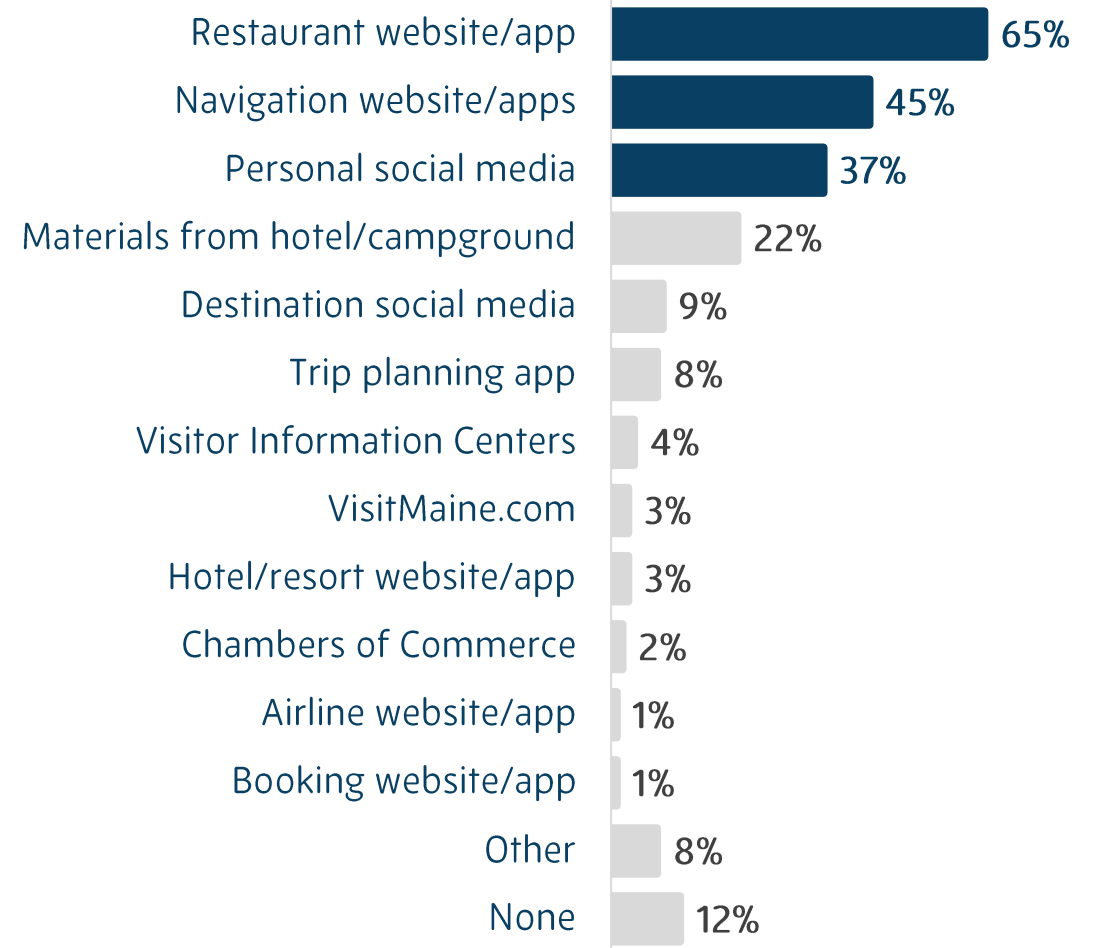
BOOKING METHODS

- » Nearly **half** of visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo (+5% points from 2023)



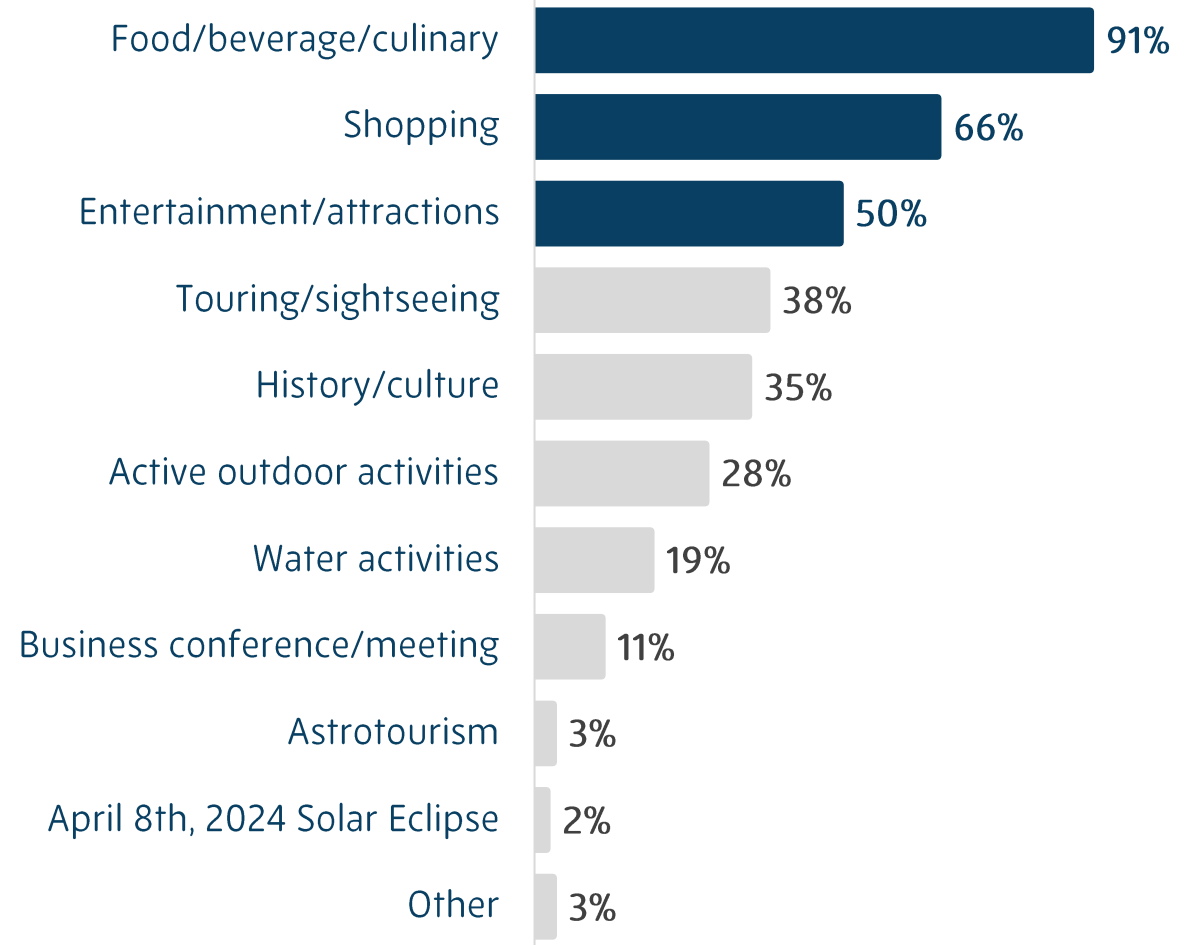
IN-MARKET VISITOR RESOURCES*

- » Like last year, visitors were most likely to rely on restaurant websites/apps to plan activities in-market
- » Around **2 in 5** visitors also used navigation websites/apps (e.g., Google Maps, etc.) or their personal social media to plan activities
- » Over **1 in 10** visitors did not use any resources to plan activities while they were in-market



VISITOR ACTIVITIES*

- » **91%** of visitors engaged in food/beverage/culinary activities during their trip to Maine (+9% points from 2023)
- » **2 in 3** visitors went shopping during their trip to Maine
- » **Half** of visitors enjoyed the state's entertainment and attractions



*Multiple responses permitted.

DETAILED VISITOR ACTIVITIES*

Activity	%	Activity	%	Activity	%
Ate other local seafood	61%	Visit historic sites/museums	15%	Attend plays/musicals/theatrical events	3%
Going to local brew pubs/craft breweries	59%	Attend popular music concerts/events	15%	Painting/drawing/sketching	3%
Ate lobster	53%	Wildlife viewing/bird watching	13%	Pool swimming	2%
Enjoying the ocean views/rocky coast	50%	Going to the beach	13%	Camping	2%
Shopping in downtown areas	49%	Viewing fall colors	12%	Amusement/theme parks	2%
Sightseeing	38%	Enjoyed unique Maine food or beverages	10%	Children's museums	2%
Outlet shopping	38%	Enjoying local food at fairs/festivals	10%	Hunting	1%
Consumed other locally produced Maine foods	34%	Canoeing/kayaking	9%	Mountain/Fat Biking	1%
Enjoyed high-end cuisine or five-star dining	28%	Attend sporting events	9%	Nordic skiing	1%
Shopping for gifts/souvenirs	28%	Ate farm-to-table or organic cuisine	8%	Riding all-terrain vehicles	1%
Driving for pleasure	27%	Fishing	8%	Bicycling touring	1%
Tours of communities/local architecture	25%	Sailing	8%	Snowshoeing	1%
Shopping for antiques/local arts and crafts	24%	Motor boating	7%	Attend operas/classical music events	1%
Shopping for unique/locally produced goods	24%	Outdoor swimming	7%	Water parks	1%
Photography	19%	Exploring State and National Parks	7%	Animal parks/zoos	1%
Visited Farmer's Markets	19%	Bars/nightlife	7%	White water rafting	<1%
Nature cruises or tours	18%	Outdoor fun centers	6%	Water skiing/jet skiing	<1%
Enjoying the mountain views	17%	Shopping at malls	4%	Surfing	<1%
Visit art museums/local artisan studios	17%	Agricultural fairs	4%	Snowmobiling	<1%
Shopping for "Made in Maine" products	17%	Alpine skiing/snowboarding	3%	Horseback riding	<1%
Hiking/climbing/backpacking	15%	Get to know the local people and/or culture	3%	Summer camps	<1%

*Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

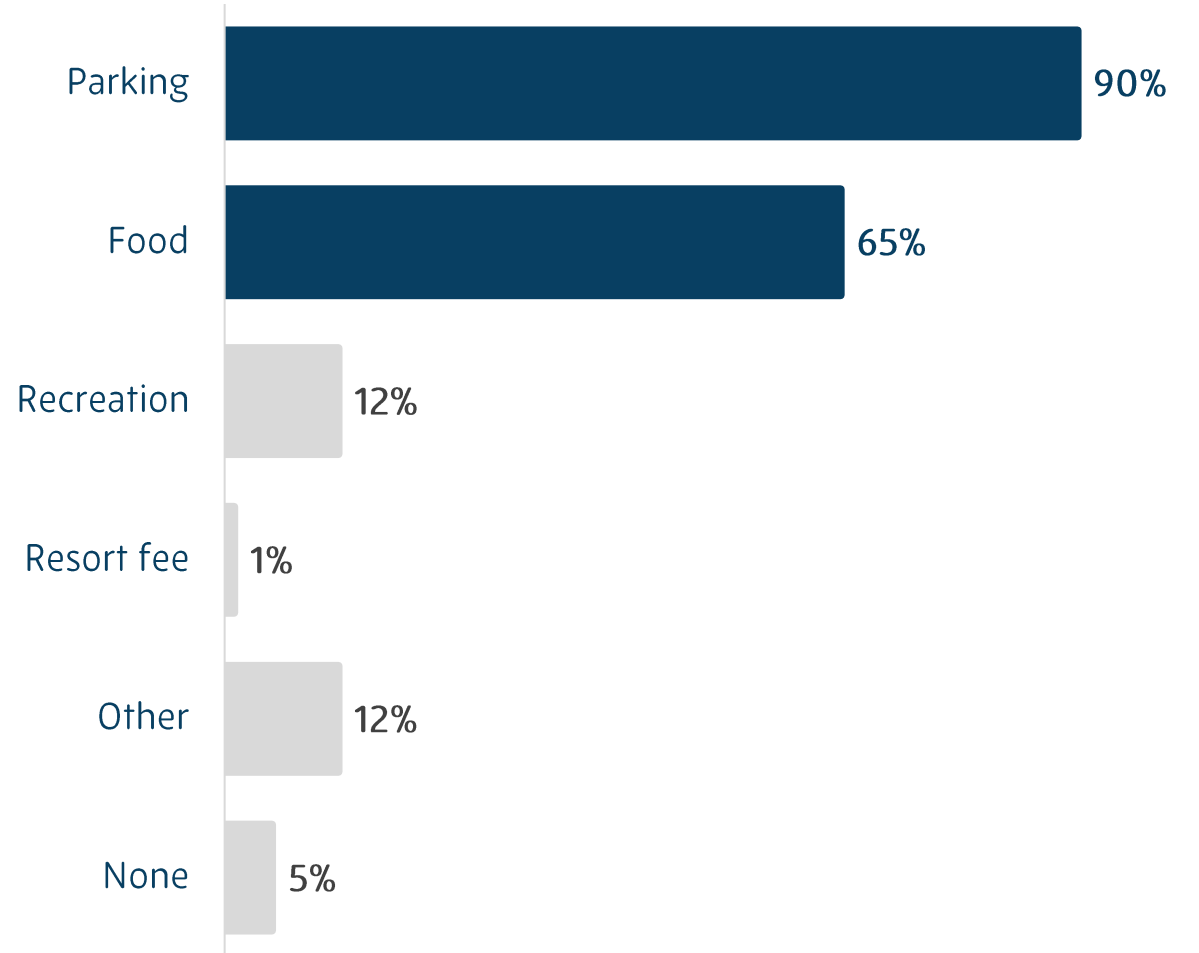
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$277	\$0	\$0
Transportation	\$29	\$23	\$30
Groceries	\$29	\$32	\$7
Restaurants	\$132	\$86	\$92
Shopping	\$139	\$92	\$122
Activities & Attractions	\$54	\$37	\$34
Other	\$5	\$5	\$4
Daily Spending	\$665	\$275	\$289

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,163	\$0	\$0
Transportation	\$122	\$159	\$30
Groceries	\$122	\$221	\$7
Restaurants	\$554	\$593	\$92
Shopping	\$584	\$635	\$122
Activities & Attractions	\$227	\$255	\$34
Other	\$21	\$35	\$4
Total Spending	\$2,793	\$1,898	\$289

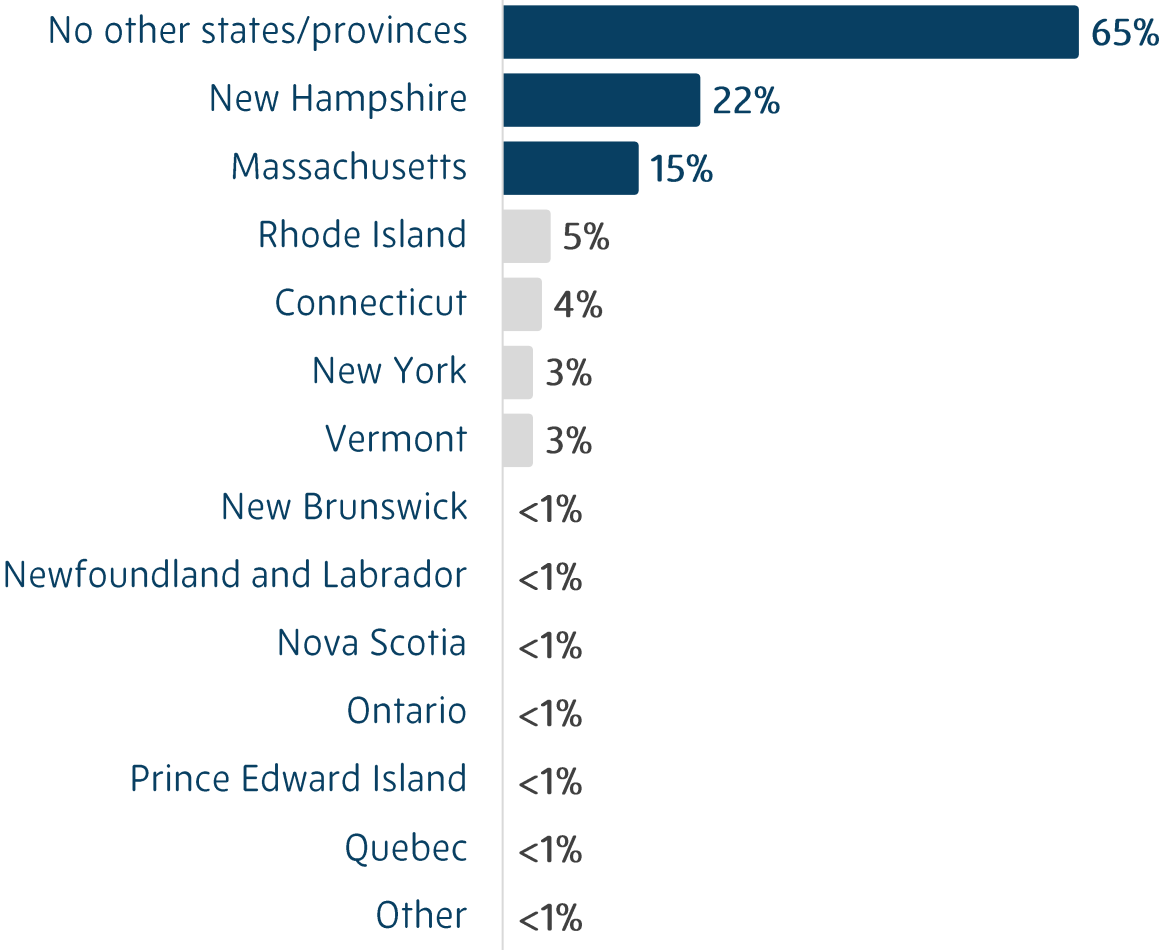
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for over **9 in 10** visitors
- » Price for accommodations included parking for **9 in 10** visitors
- » Food was included in accommodations' pricing for nearly **2 in 3** visitors



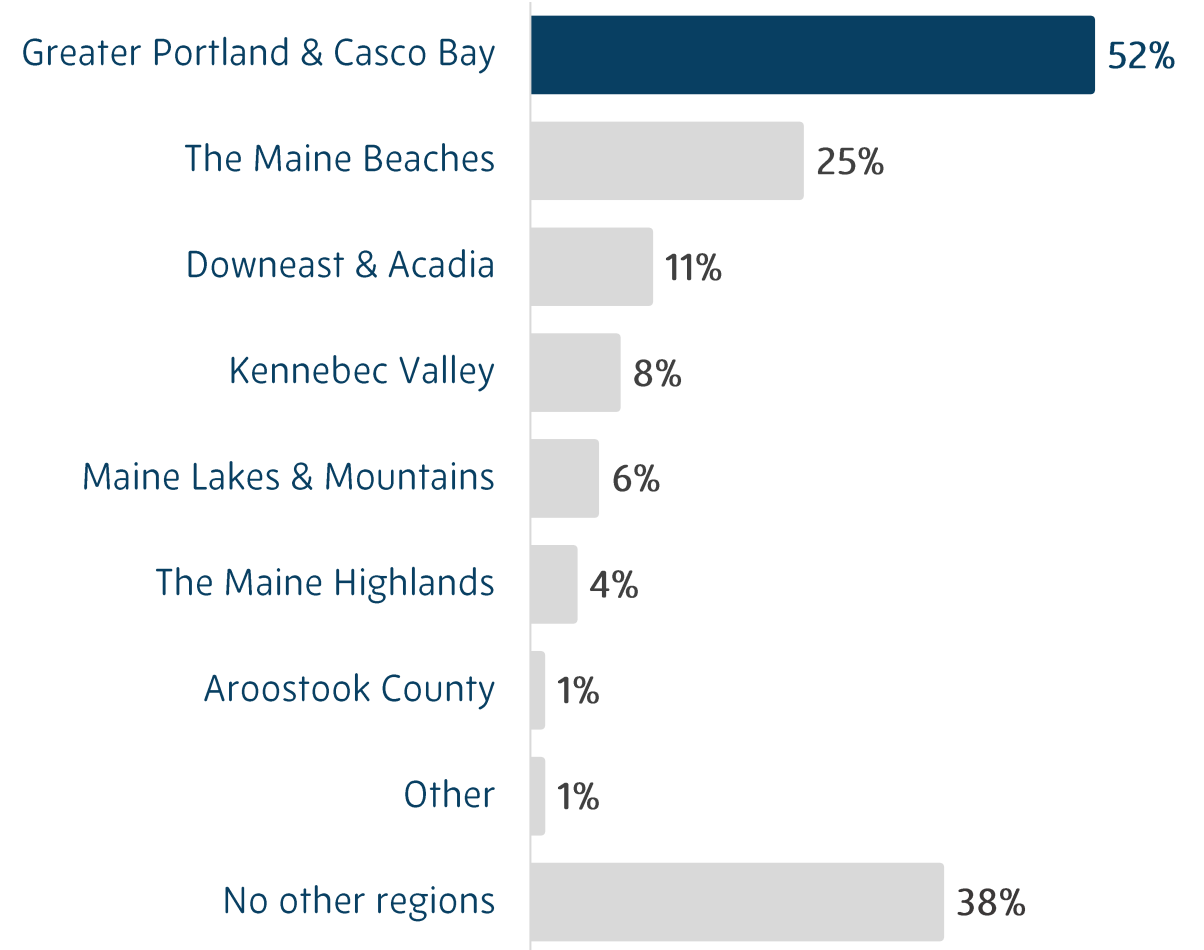
OTHER STATES & PROVINCES VISITED*

- » Nearly **2 in 3** visitors did not visit any other U.S. state or Canadian province during their trip (+2% points from 2023)
- » Over **1 in 5** visitors also went to New Hampshire during their trip
- » Nearly **1 in 6** also went to Massachusetts
- » Like last year, 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*

- » 52% of visitors visited Greater Portland & Casco Bay in addition to their primary destination within Maine
- » Like last year, nearly 2 in 5 visitors stayed within Maine's Midcoast & Islands during their trip rather than traveling throughout the state



VISITOR JOURNEY : POST-TRIP EVALUATION

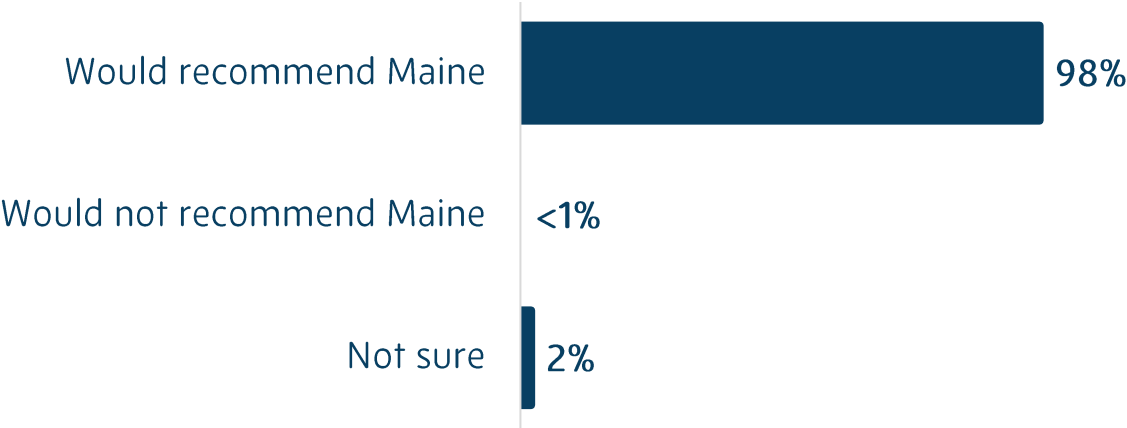


RECOMMENDING MAINE & ITS REGIONS

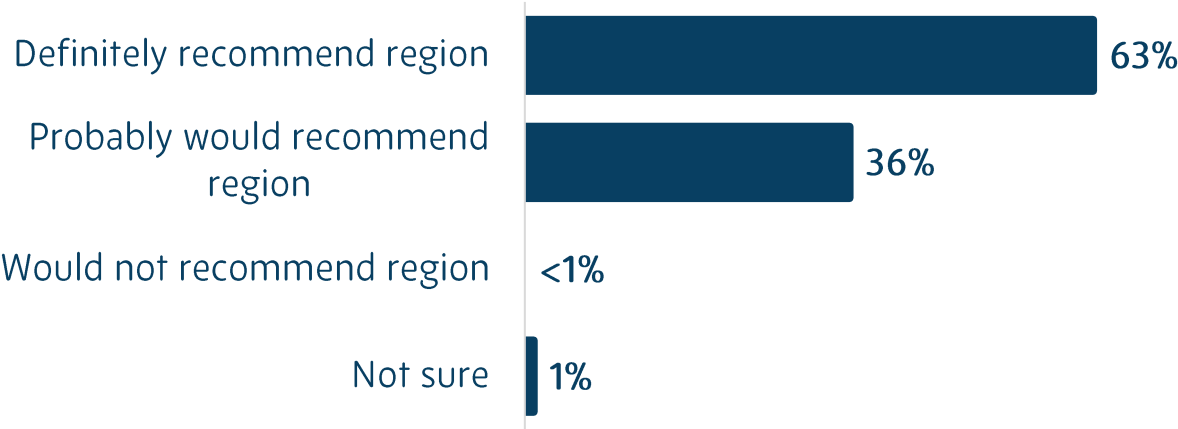
» **98%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation (+1% point from 2023)

» **99%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **63%** would definitely recommend

Likelihood of Recommending Maine



Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

» **91%** of visitors will return to Maine for a future visit or vacation (+3% points from 2023)



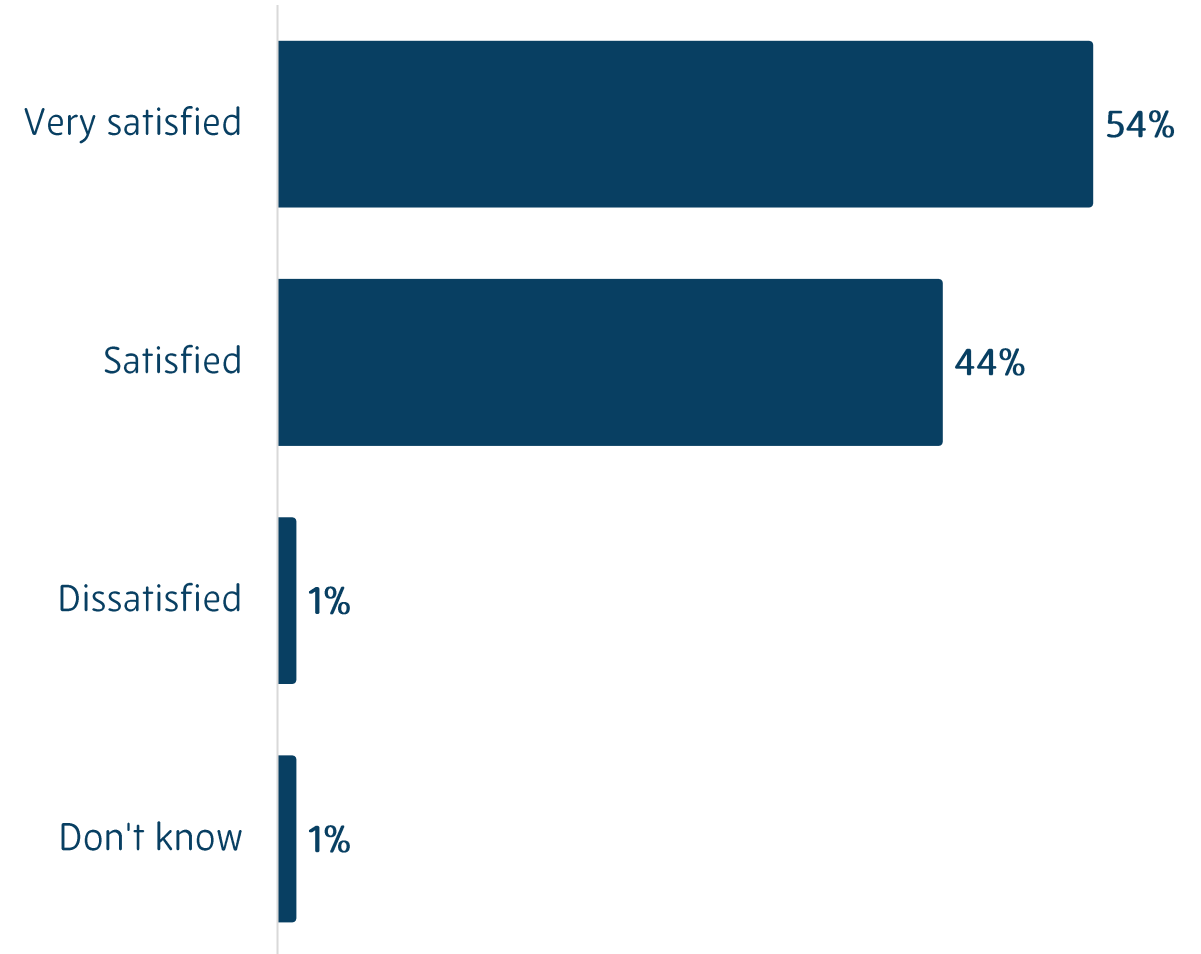
*9% of all visitors are not sure or will probably not return to Maine for the following reasons:
1. Prefer a variety of destinations 2. Traffic/difficult drive 3. Once is enough to see and do everything 4. Airline service is too limited/too expensive 5. Too expensive for what you get.

Midcoast & Islands

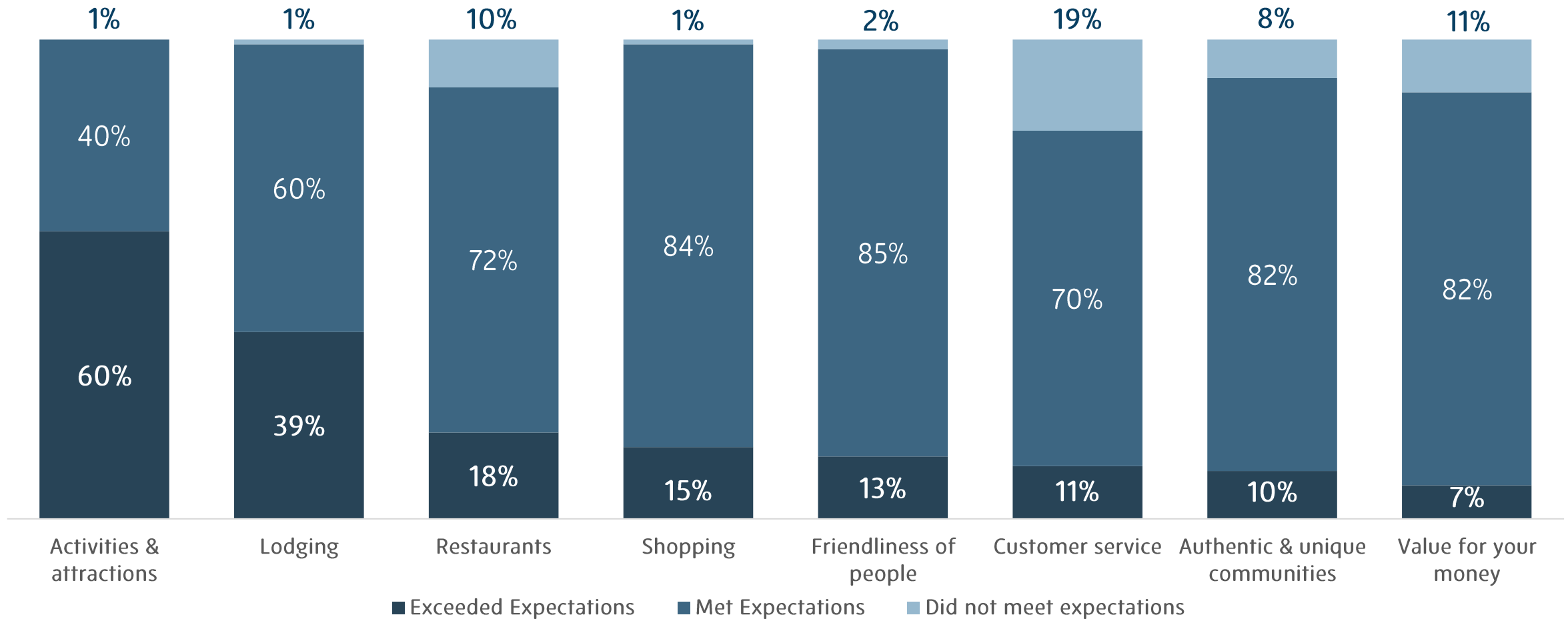
86

SATISFACTION

- » **98%** of visitors were satisfied with their trip to Maine
- » **54%** were very satisfied with their trip to Maine (-10% points from 2023)

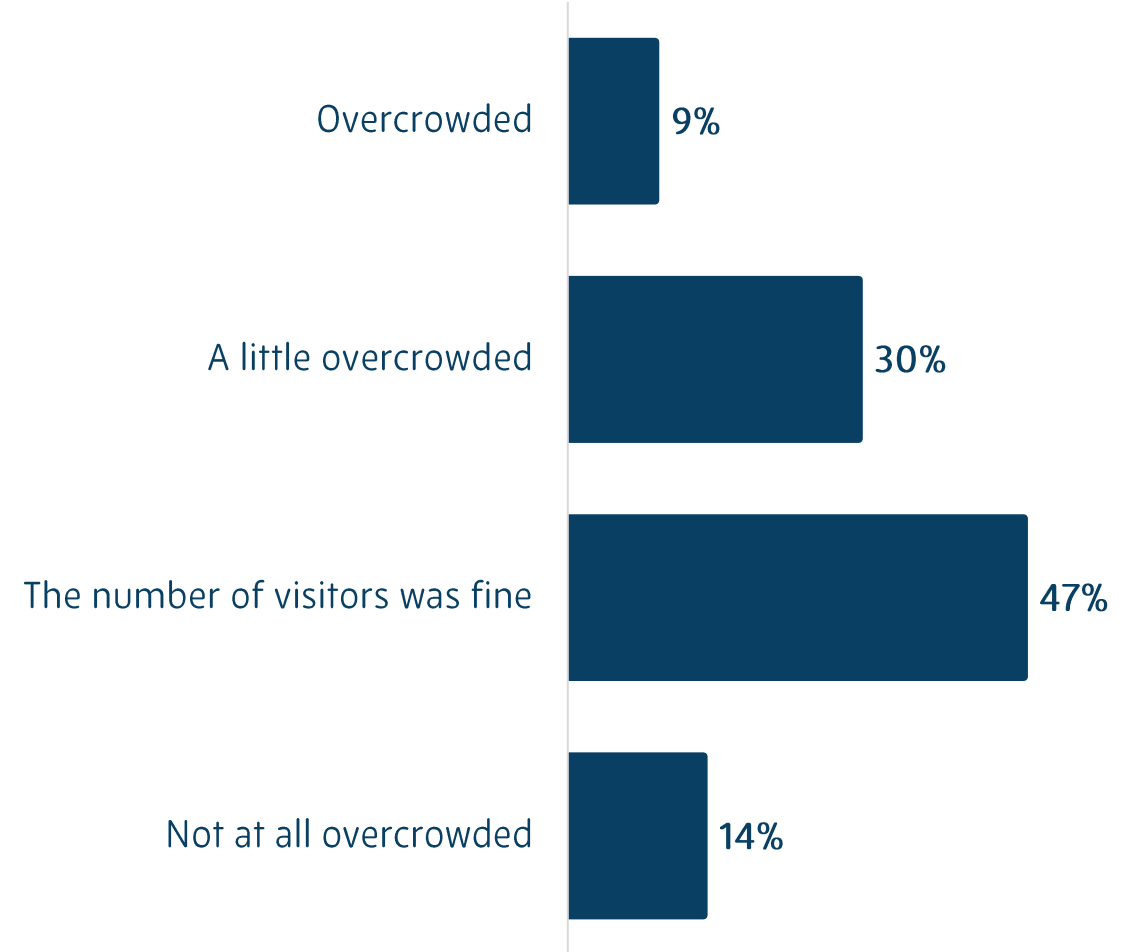


TRIP RATINGS



OVERCROWDING

- » 47% of visitors thought the number of visitors during their trip to Maine was fine (+3% points from 2023)
- » 30% of visitors thought it was a little overcrowded (-6% points from 2023)



ANNUAL COMPARISONS



VISITOR JOURNEY : PRE-VISIT



TRIP PLANNING CYCLE

Trip Planning Cycle	2023	2024
A week or less	8%	9%
2 - 3 weeks	16%	19%
1 - 2 months	31%	38%
3 - 4 months	16%	15%
5 - 6 months	15%	11%
7 months - 1 year	12%	7%
More than 1 year	2%	1%
Days in Planning Cycle	55	47

Booking Window	2023	2024
A week or less	12%	14%
2 - 3 weeks	18%	20%
1 - 2 months	29%	35%
3 - 4 months	14%	13%
5 - 6 months	15%	10%
7 months - 1 year	11%	7%
More than 1 year	1%	1%
Days in Booking Window	51	44

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2023	2024
Online search engines	50%	50%
Facebook	29%	34%
Hotel websites	22%	27%
Online travel agency	21%	24%
Instagram	15%	18%
Visit Maine social media	12%	13%
Traveler reviews/blogs/stories	19%	11%
Vrbo	11%	10%
YouTube	10%	10%
VisitMaine.com	10%	9%
Airbnb	7%	7%
TripAdvisor	11%	6%
Vacation rental websites	6%	4%
Airline websites	4%	3%
DiscoverNewEngland.com	3%	2%
MaineTourism.com	2%	2%
DowneastAcadia.com	1%	1%
MainesMidCoast.com	2%	1%
TheMaineBeaches.com	1%	1%
VisitPortland.com	2%	1%
MaineLakesandMountains.com	1%	1%
X (Formerly Twitter)	1%	1%
VisitBarHarbor.com	1%	1%
TheMaineHighlands.com	1%	1%
VisitAroostook.com	<1%	<1%
KennebecValley.org	<1%	<1%
Other	4%	3%
None	21%	21%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2023	2024
Advice from friends/family	71%	84%
Articles or travelogues	35%	24%
AAA	17%	12%
Travel planning apps	8%	7%
Travel guides/brochures	4%	4%
Called local Chambers of Commerce	3%	3%
Travel books & magazines	3%	3%
Called local convention and visitors bureaus	1%	1%
Called the Maine Office of Tourism	1%	1%
Called another Maine Tourism/Lodging Association	1%	1%
Visitor Guide	1%	1%
Visit Maine e-newsletter	1%	1%
Travel agent	1%	1%
Other	3%	3%
None	19%	20%

REASON FOR VISITING*

Reasons for Visiting	2023	2024
Visiting friends/relatives	46%	54%
Special occasion	24%	25%
Shopping	20%	25%
Relax and unwind	25%	23%
Attractions	15%	19%
Special event	21%	19%
Sightseeing/touring	20%	15%
Conference/meeting	9%	10%
Culture/museums/history	9%	10%
Nature & bird watching	11%	8%
Active outdoor activities	7%	6%
Water activities	6%	5%
Sporting event	3%	4%
Beach	3%	3%
Snow activities	1%	2%
April 8th, 2024 Solar Eclipse	NA	2%
Astrotourism	<1%	<1%
Other	8%	9%

*Multiple responses permitted.

TV SHOWS & FILM

Trip Inspiration From Film	2023	2024
Yes	3%	3%
No	97%	96%
Don't know	<1%	1%

How Film Inspired Trip*	2023	2024
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	83%	59%
Seeing Maine in a film or TV show made me think about Maine as a place to visit	7%	28%
Visiting a location related to a TV show or film was the main reason I visited Maine	3%	7%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	<1%	4%
Something else	7%	2%

Visited TV or Film Attractions**	2023	2024
Yes	12%	15%
No	87%	84%
Don't know	1%	1%

*Only asked to those who said a TV show or film inspired them to take a trip to Maine.

**Only asked to those who said they were NOT inspired by a TV show or film to visit Maine.

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2023	2024
No other states/provinces	51%	51%
New Hampshire	32%	30%
Massachusetts	20%	20%
Rhode Island	8%	7%
Connecticut	6%	5%
Vermont	7%	5%
New York	5%	4%
Nova Scotia	1%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
New Brunswick	1%	<1%
Newfoundland and Labrador	<1%	<1%
Ontario	<1%	<1%
Other	1%	1%

ADVERTISING/PROMOTIONS

Recalled Advertising	2023	2024
Yes	66%	59%
No	21%	12%
Not sure	13%	29%

Influenced by Advertising	2023	2024
Yes	40%	32%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recalled*	2023	2024
Social media	56%	66%
Magazine	30%	33%
Internet	34%	25%
Radio	22%	17%
Newspaper	10%	9%
VisitMaine.com	6%	7%
AAA	11%	7%
Cable or satellite television	5%	5%
Brochure	2%	4%
Traveler reviews/blogs	5%	3%
Maine travel/visitor guide	2%	2%
Deal – based promotion	2%	1%
Billboard	1%	1%
Online streaming service	3%	1%
Music/podcast streaming	1%	1%
Other	1%	1%
Not sure	1%	2%

VISITOR JOURNEY : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2023	2024
Maine	27%	30%
New England	32%	35%
Mid-Atlantic	21%	19%
Southeast	8%	7%
Southwest	3%	2%
Midwest	5%	3%
West	2%	2%
Canada	1%	1%
International	1%	1%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2023	2024
Maine	27%	30%
Massachusetts	15%	17%
New Hampshire	8%	8%
Connecticut	7%	7%
New York	8%	6%
Florida	4%	4%
New Jersey	5%	4%
Pennsylvania	3%	3%
Maryland	2%	2%
Rhode Island	2%	2%
Vermont	1%	2%
Virginia	2%	2%

ORIGIN MARKET

Origin Markets	2023	2024
Boston	9%	11%
New York City ¹	8%	7%
Portland	4%	5%
Augusta	4%	4%
Washington DC - Baltimore ²	3%	3%
Belfast	2%	3%
Waterville	2%	3%
Auburn - Lewiston	3%	3%
Providence, RI	2%	2%
Manchester, NH	1%	2%

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

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

TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2023	2024
As a couple	46%	39%
As a family	19%	21%
Traveled alone	14%	17%
With other couples/friends	13%	16%
With business associates	4%	4%
In a tour group	4%	3%
Other	<1%	<1%
Average Travel Party Size	2.9	2.9

TRAVEL WITH CHILDREN*

Children in Travel Party*	2023	2024
No children	87%	85%
Children younger than 6	5%	5%
Children 6 – 12	8%	9%
Children 13 – 17	4%	5%

Gender	2023	2024
Male	45%	42%
Female	55%	56%
Gender-fluid/non-binary	NA	1%
Transgender	NA	1%
Other	NA	<1%

DEMOGRAPHIC PROFILE

Age	2023	2024
Under 25	2%	1%
25 – 34	9%	8%
35 – 44	24%	23%
45 – 54	22%	27%
55 – 65	31%	29%
Over 65	12%	12%
Median Age	52	52

Race/Ethnicity	2023	2024
White	89%	89%
Asian	3%	4%
Black	3%	3%
Hispanic	1%	1%
Indigenous	<1%	<1%
Other	4%	3%

LIFESTYLE PROFILE

Marital Status	2023	2024
Single/widowed	20%	25%
Married/living with partner	80%	75%

Employment Status	2023	2024
Employed full-time	45%	53%
Employed part-time	17%	15%
Contract/freelance/temporary employee	13%	12%
Retired	14%	12%
Not currently employed	9%	6%
Student	2%	2%

LIFESTYLE PROFILE

Household Income	2023	2024
Less than \$25,000	2%	2%
\$25,000 - \$49,999	9%	7%
\$50,000 - \$74,999	34%	29%
\$75,000 - \$99,999	29%	32%
\$100,000 - \$149,999	18%	22%
\$150,000 - \$199,999	5%	6%
\$200,000 - \$249,999	1%	1%
\$250,000 or more	2%	1%
Median Household Income	\$79,300	\$84,400

LIFESTYLE PROFILE

Educational Attainment	2023	2024
High school or less	2%	2%
Some college or technical school	12%	11%
College or technical school graduate	77%	79%
Graduate school	9%	8%

NEW & RETURNING VISITORS

Previous Trips to Maine	2023	2024
This is my first time	15%	11%
2 - 5 times	32%	29%
6 - 10 times	28%	32%
11+ times	25%	28%

VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2023	2024
Drove to Maine	84%	86%
Flew into Portland Intl Jetport	5%	5%
Flew into Boston Logan Intl	3%	3%
Took a motor coach tour or bus	4%	3%
Flew into Manchester-Boston Regional Airport	1%	1%
Other	1%	2%

LENGTH OF STAY

Nights Stayed	2023	2024
Not staying overnight	11%	11%
1 night	10%	11%
2 nights	14%	14%
3 nights	22%	24%
4 nights	14%	14%
5+ nights	29%	26%
Average Length of Stay	4.8	4.6

ACCOMMODATIONS

Accommodations	2023	2024
Hotel/motel/resort	32%	35%
Friends/family home	20%	22%
Vacation rental home	14%	12%
Not spending the night	11%	11%
Bed & Breakfast/Inn	8%	8%
Personal second home	7%	6%
Campground/RV Park	4%	2%
Wilderness camping	1%	1%
Sporting camp/wilderness lodge	<1%	<1%
Outdoor Outfitter	<1%	<1%
Other	3%	3%

BOOKING

Booking Methods	2023	2024
Directly with the hotel/condo	44%	49%
Online travel agency	23%	24%
Short term rental service	11%	11%
Airbnb	8%	6%
Vacation rental company	6%	4%
Group tour operator	4%	4%
Offline travel agent	<1%	<1%
Travel package provider	<1%	<1%
Other	4%	2%

IN-MARKET RESOURCES*

In-Market Resources	2023	2024
Restaurant website/app	65%	65%
Navigation website/apps	47%	45%
Personal social media	40%	37%
Materials from hotel/campground	24%	22%
Destination social media	8%	9%
Trip planning app	8%	8%
Visitor Information Centers	6%	4%
VisitMaine.com	4%	3%
Hotel/resort website/app	5%	3%
Chambers of Commerce	4%	2%
Airline website/app	1%	1%
Booking website/app	2%	1%
Other	9%	8%
None	11%	12%

ACTIVITIES*

Activities	2023	2024
Food/beverage/culinary	82%	91%
Shopping	62%	66%
Entertainment/attractions	47%	50%
Touring/sightseeing	46%	38%
History/culture	31%	35%
Active outdoor activities	32%	28%
Water activities	22%	19%
Business conference/meeting	9%	11%
Astrotourism	2%	3%
April 8th, 2024 Solar Eclipse	NA	2%
Other	4%	3%

DETAILED VISITOR ACTIVITIES*

Activity	%	Activity	%	Activity	%
Ate other local seafood	61%	Visit historic sites/museums	15%	Attend plays/musicals/theatrical events	3%
Going to local brew pubs/craft breweries	59%	Attend popular music concerts/events	15%	Painting/drawing/sketching	3%
Ate lobster	53%	Wildlife viewing/bird watching	13%	Pool swimming	2%
Enjoying the ocean views/rocky coast	50%	Going to the beach	13%	Camping	2%
Shopping in downtown areas	49%	Viewing fall colors	12%	Amusement/theme parks	2%
Sightseeing	38%	Enjoyed unique Maine food or beverages	10%	Children's museums	2%
Outlet shopping	38%	Enjoying local food at fairs/festivals	10%	Hunting	1%
Consumed other locally produced Maine foods	34%	Canoeing/kayaking	9%	Mountain/Fat Biking	1%
Enjoyed high-end cuisine or five-star dining	28%	Attend sporting events	9%	Nordic skiing	1%
Shopping for gifts/souvenirs	28%	Ate farm-to-table or organic cuisine	8%	Riding all-terrain vehicles	1%
Driving for pleasure	27%	Fishing	8%	Bicycling touring	1%
Tours of communities/local architecture	25%	Sailing	8%	Snowshoeing	1%
Shopping for antiques/local arts and crafts	24%	Motor boating	7%	Attend operas/classical music events	1%
Shopping for unique/locally produced goods	24%	Outdoor swimming	7%	Water parks	1%
Photography	19%	Exploring State and National Parks	7%	Animal parks/zoos	1%
Visited Farmer's Markets	19%	Bars/nightlife	7%	White water rafting	<1%
Nature cruises or tours	18%	Outdoor fun centers	6%	Water skiing/jet skiing	<1%
Enjoying the mountain views	17%	Shopping at malls	4%	Surfing	<1%
Visit art museums/local artisan studios	17%	Agricultural fairs	4%	Snowmobiling	<1%
Shopping for "Made in Maine" products	17%	Alpine skiing/snowboarding	3%	Horseback riding	<1%
Hiking/climbing/backpacking	15%	Get to know the local people and/or culture	3%	Summer camps	<1%

*Multiple responses permitted.

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2023	2024
No other states/provinces	63%	65%
New Hampshire	24%	22%
Massachusetts	16%	15%
Rhode Island	6%	5%
Connecticut	5%	4%
New York	4%	3%
Vermont	4%	3%
New Brunswick	<1%	<1%
Newfoundland and Labrador	<1%	<1%
Nova Scotia	<1%	<1%
Ontario	<1%	<1%
Prince Edward Island	<1%	<1%
Quebec	<1%	<1%
Other	1%	<1%

TRAVELING IN MAINE*

Maine Regions Visited	2023	2024
Greater Portland & Casco Bay	50%	52%
The Maine Beaches	27%	25%
Downeast & Acadia	14%	11%
Kennebec Valley	11%	8%
Maine Lakes & Mountains	5%	6%
The Maine Highlands	5%	4%
Aroostook County	1%	1%
Other	2%	1%
No other regions	38%	38%

VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2023	2024
Would recommend Maine	97%	98%
Would not recommend Maine	<1%	<1%
Not sure	3%	2%

Recommending Regions	2023	2024
Definitely recommend region	63%	63%
Probably would recommend region	35%	36%
Would not recommend region	<1%	<1%
Not sure	2%	1%

RETURNING TO MAINE

Returning to Maine	2023	2024
Definitely will return	56%	66%
Probably will return	32%	25%
Probably will not return	1%	1%
Not sure	11%	8%

SATISFACTION

Satisfaction	2023	2024
Very satisfied	64%	54%
Satisfied	34%	44%
Dissatisfied	1%	1%
Don't know	1%	1%

TRIP EXPECTATIONS

Exceeded Expectations	2023	2024
Activities & attractions	58%	60%
Lodging	42%	39%
Restaurants	14%	18%
Shopping	15%	15%
Friendliness of people	17%	13%
Customer service	11%	11%
Authentic & unique communities	14%	10%
Value for your money	9%	7%

OVERCROWDING

Overcrowding	2023	2024
Overcrowded	16%	9%
A little overcrowded	36%	30%
The number of visitors was fine	44%	47%
Not at all overcrowded	4%	14%

STUDY METHODS



METHODOLOGY



Visitor Tracking

1,009 interviews were completed with visitors to Midcoast & Islands online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2023 and November 30th, 2024.

Economic Impact

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

Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to Midcoast & Islands. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Midcoast & Islands' multiplier is 1.45.

MIDCOAST & ISLANDS

2024 Economic Impact & Visitor Tracking Report

DECEMBER 2023 – NOVEMBER 2024

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

