

Shaping Maine's Tourism Future

MAINE.
VISITMAINE.COM

INSIGHTS & ACTION FROM THE FALL
STATEWIDE LISTENING TOUR

April 16, 2025



C
coraggiogroup



First things first: THANK YOU!

MAINE.

[VISITMAINE.COM](https://www.visitmaine.com)



coraggiogroup

What we'll cover

Current trends

Highlights from the MOT Roadshow

Key updates to the DMP



Let's get started!

Use your cell phone camera
to pull up the link using the
QR code



Flannel Battle:

What is your favorite
flannel brand?



What is your favorite flannel brand?

028

LL Bean



Faherty



Lands End



Gap



Duluth Trading



Pendleton

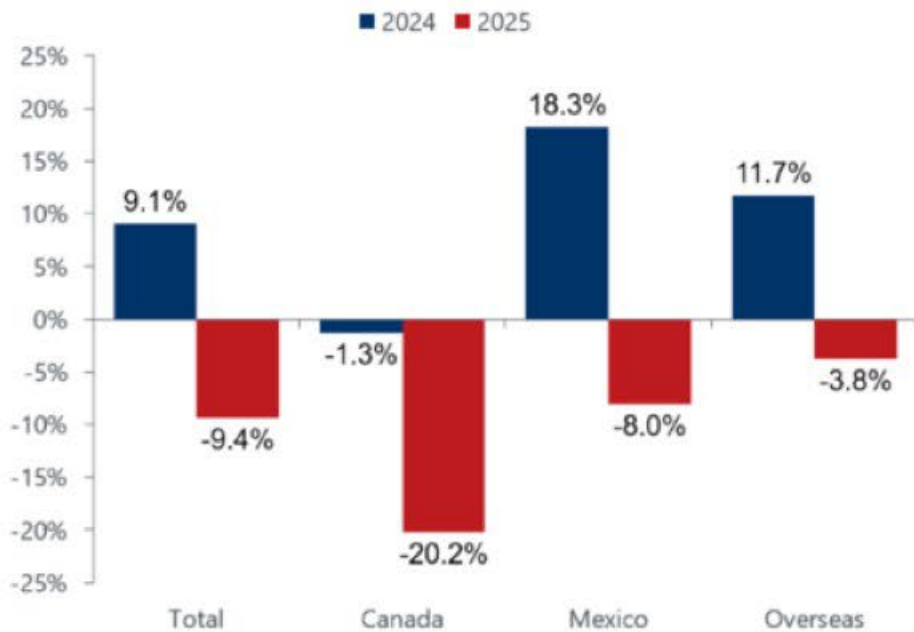


An aerial photograph of a vast, snow-covered mountain range. The slopes are marked with numerous parallel ski tracks, creating a rhythmic pattern of white and dark green. The foreground shows a dense forest of evergreen trees, partially covered in snow. The sky is a clear, pale blue with a few wispy clouds. A semi-transparent white rectangular box is overlaid on the upper half of the image, containing the title text.

The Current Travel Landscape

National Trends

International Arrivals to the US



Source: Tourism Economics



Arrivals to U.S.

March 2025 vs. March 2024:

Global: -11.6%
Western Europe combined: -17%
UK: -14.3%
Germany: -28.2%
Spain: -24.6%

(U.S. NTTO, March 2025)

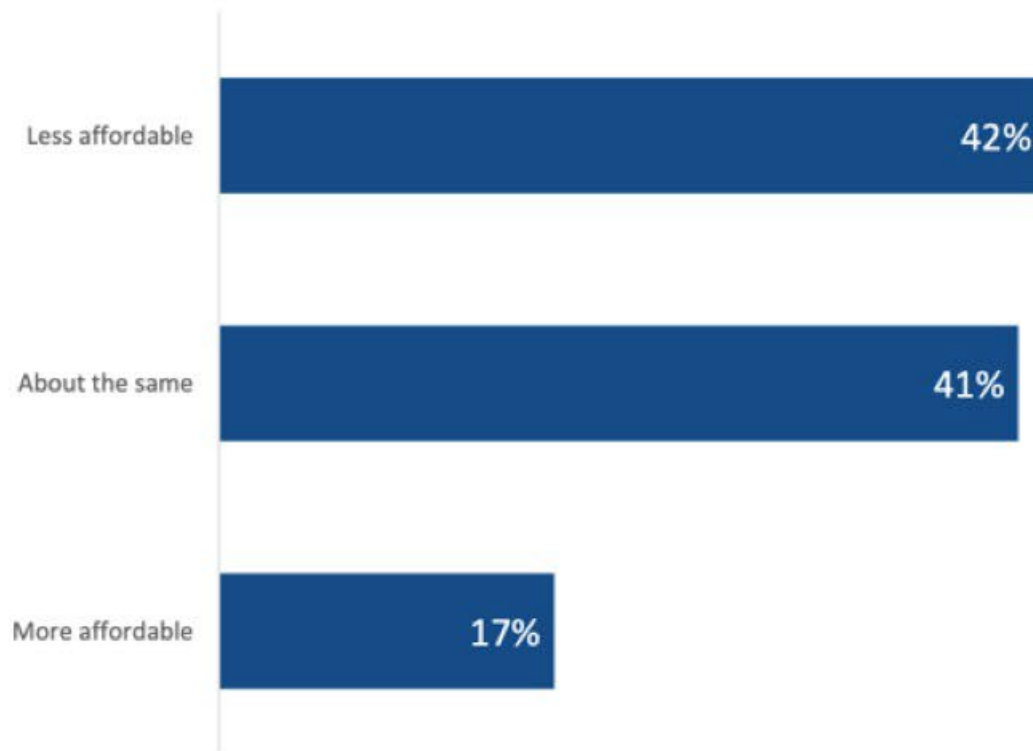
Canadian arrivals to U.S.

32% drop in the number of Canadians who took road trips into the U.S in March 2025 vs. March 2024. (Statistics Canada)

Forward bookings from Canada to the U.S. have fallen by more than 70% for every month through to the end of September 2025 compared to the same period last year. (aviation analytics provider OAG)

Travel Affordability Concerns: Most Expect Higher or Steady Costs

Do you expect travel to become more/less affordable in the next year?

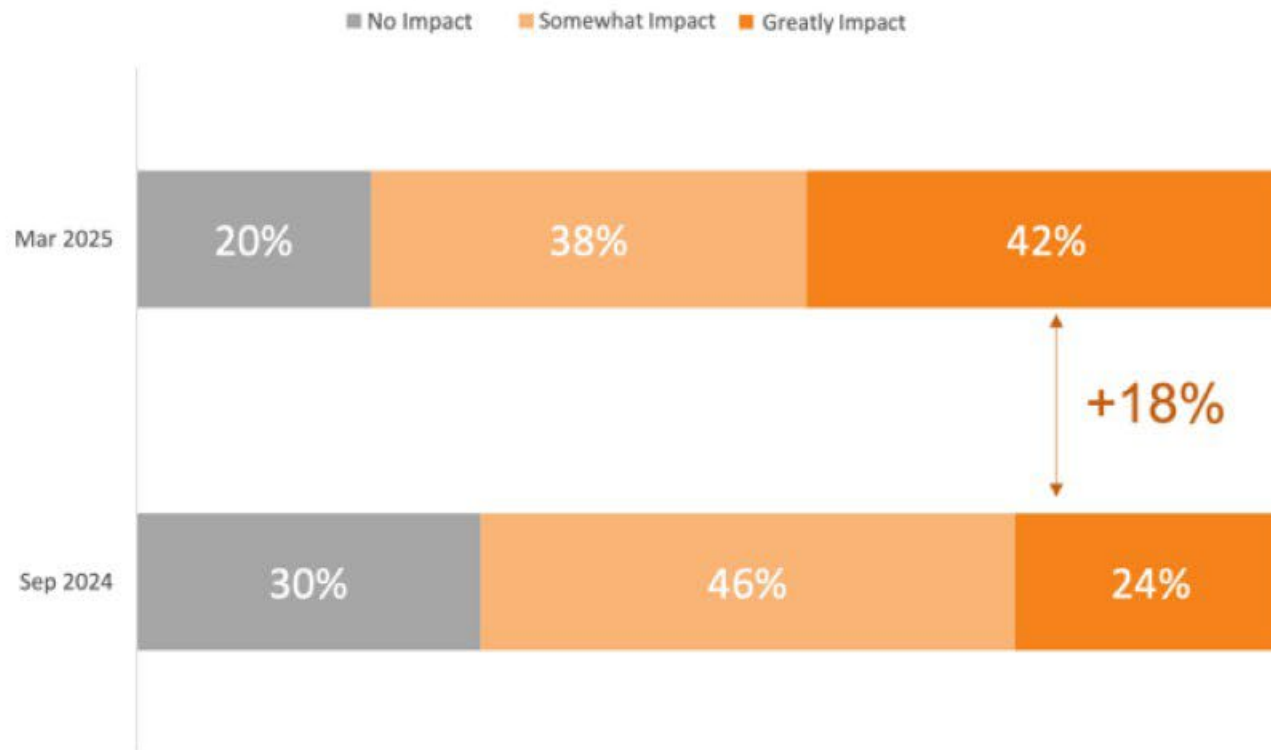


A majority of respondents (83%) expect travel costs to become less affordable or remain the same in the next year. This suggests growing concerns about personal finances, the economy, inflation, airfare, and accommodation prices impacting travel decisions.

Source: Longwoods International ATS Wave 94
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Growing Influence of Politics on Travel Decisions

To what extent does the political climate of a destination influence your decision to visit?

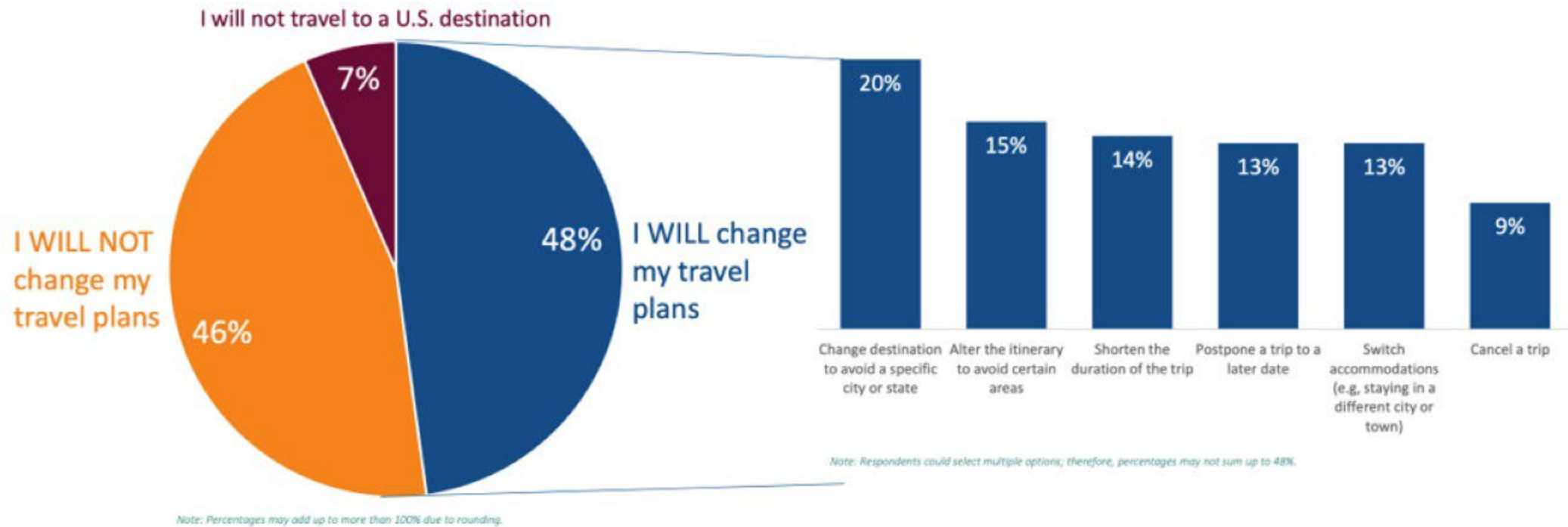


The political climate of a destination is becoming a more significant factor in travel decisions. Since September 2024, the percentage of travelers who say **politics will Greatly impact their travel choices** has jumped from **24% to 42%**, while those saying it will have no impact has dropped from 30% to 20%. This shift suggests increasing polarization and heightened political awareness are shaping travel behaviors more than before.

Source: Longwoods International ATS Wave 94
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Half of Travelers Rethink U.S. Trips Due to Politics

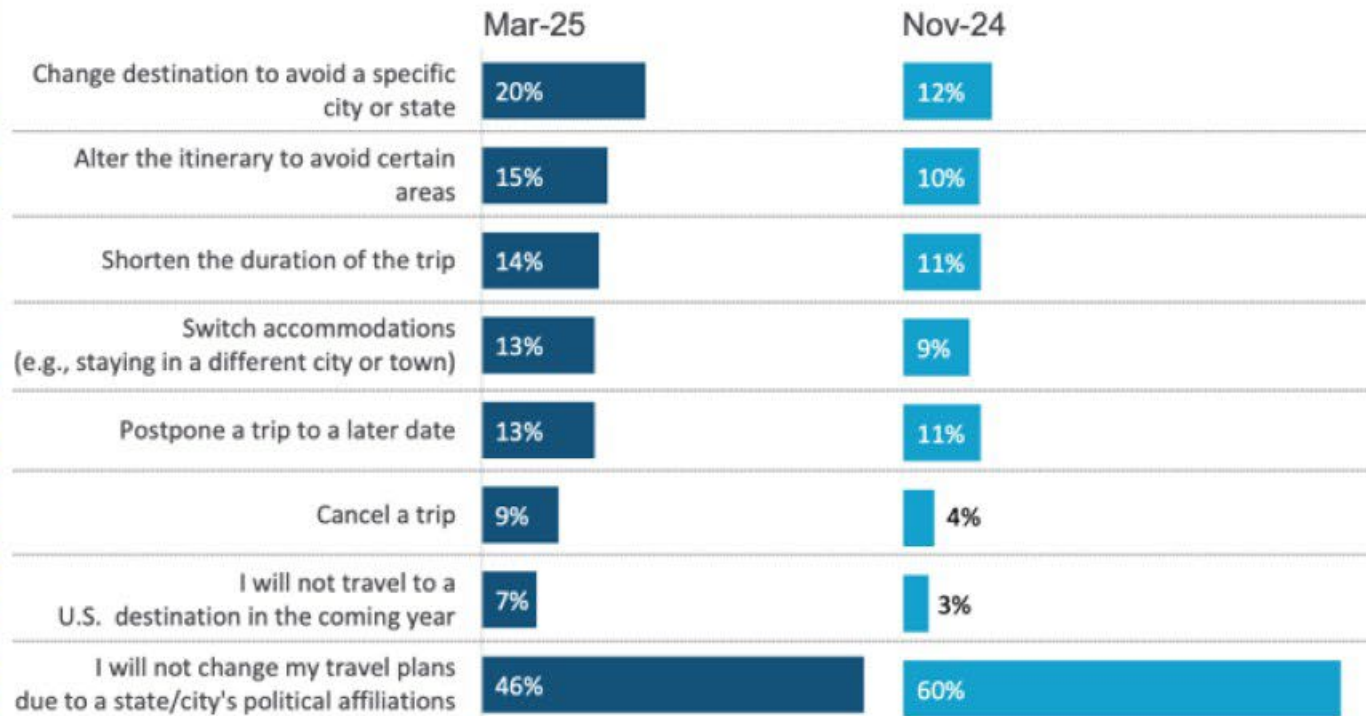
In the upcoming year, will you change your travel plans to a U.S. destination due to legislation, policies, or political affiliations?



Source: Longwoods International ATS Wave 94
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Political Influence on U.S. Travel Plans Grows from Nov 2024 to Mar 2025

In the upcoming year, will you change your travel plans to a U.S. destination due to legislation, policies, or political affiliations?



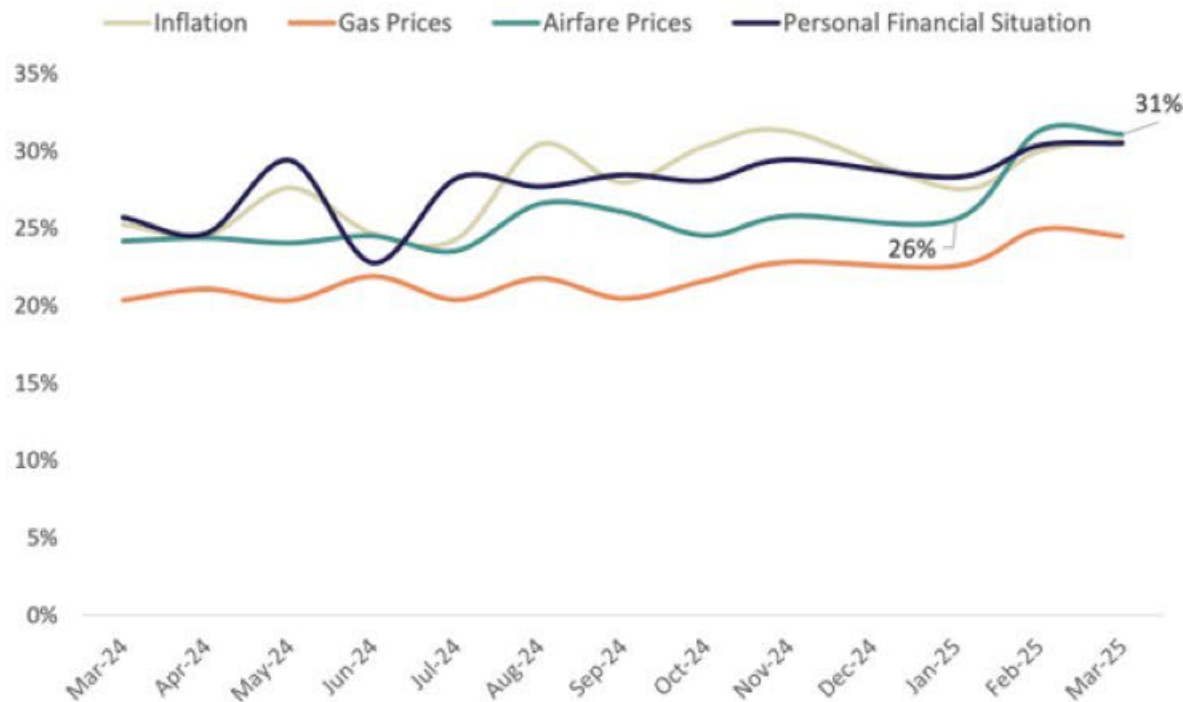
Travelers are increasingly adjusting their U.S. travel plans based on political factors. Since November 2024, the percentage of people **avoiding specific cities or states** has surged from 12% to 20%, and those altering itineraries to avoid certain areas increased from 10% to 15%. Meanwhile, those **unaffected by politics** dropped from 60% to 46%, highlighting a growing trend of politically motivated travel decisions.

Source: Longwoods International ATS Wave 94 survey fielded in March 2025 vs Wave 91 survey fielded in November 2024
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Increased Impact of Airfare Prices on Travel Plans: January 2025 vs. March 2025

Trends in Factors with Great Impact on Travel Plans (Mar'24 – Mar'25)

The chart illustrates the monthly trends in the share of travelers indicating that Inflation, Gas Prices, and Airfare Prices have a **Great Impact** on their future travel plans.



The impact of airfare prices on travel plans appears to continue to be a concern for travelers. In February and March, 31% of travelers indicated that airfare prices had a great impact on their future travel plans, an **increase from January where it was 26%**. Meanwhile, concerns about personal financial situations, inflation, and gas prices remained stable.

Source: Longwoods International ATS Wave 94
Percentages are based only on respondents who are confirmed travelers and intend on traveling in the next six months



But here's the good news...!

Travel Plans Within Next 6 Months



■ Have Travel Plans ■ No Travel Plans

89% of American Travelers have travel plans within the **next six months.**

Source: Longwoods International ATS Wave 94
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

National Trends



National Trends

Nostalgia Travel





58%
**of travelers want to revisit a
childhood destination** (Hilton Annual Trends Report, 2025)

**36% visitors to Maine have
visited >10 times** (D&SG 2023 Annual Visitor Study)

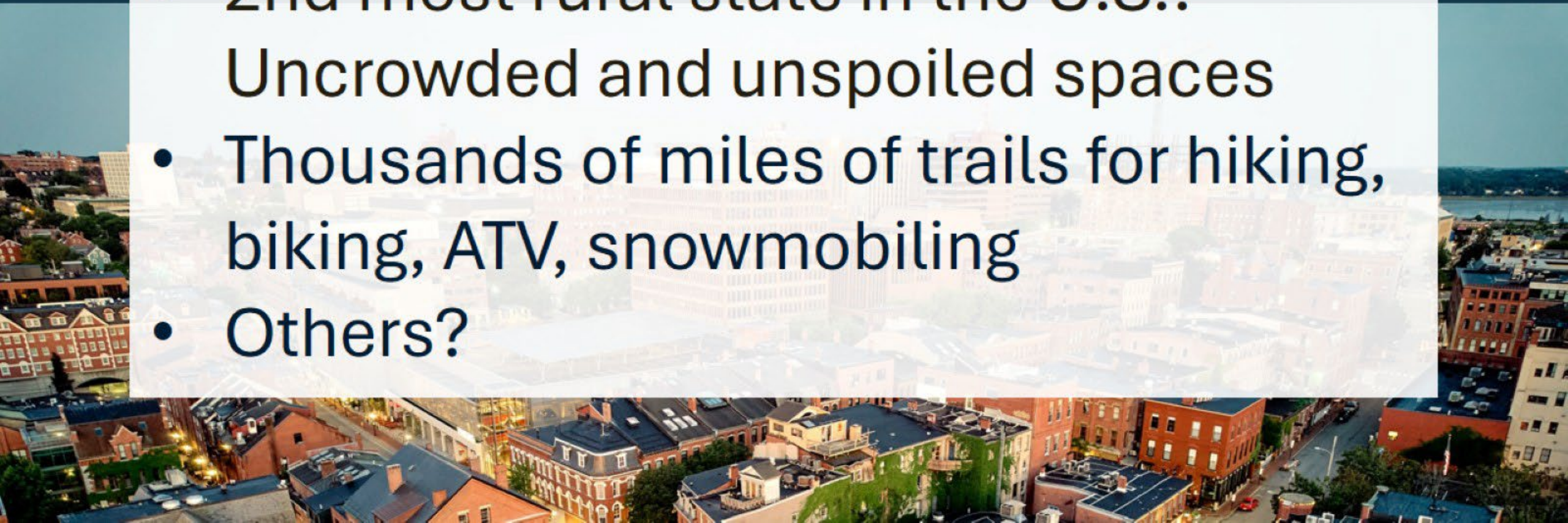
National Trends

Nostalgia Travel

Emerging Destinations –
Explore the Unexplored



- Maine Guides: unique and personal experiences
- 2nd most rural state in the U.S.:
Uncrowded and unspoiled spaces
- Thousands of miles of trails for hiking, biking, ATV, snowmobiling
- Others?



National Trends

Nostalgia Travel

Emerging Destinations –
Explore the Unexplored

Experiential Travel –
Immersion Beyond Sightseeing



- 
- Agritourism
 - Maine Outdoor Brands
 - Rich outdoor recreation assets
 - Wabanaki heritage
 - Small business owners, growers, fishers, and makers
 - Hands-on experiences
 - Arts & cultural events

Roadshow Insights



MOT Roadshow

Houlton
Machias
Bangor
Waterville
Rockport
Portland
Lewiston/Auburn
Wells
Ellsworth/Bar Harbor
virtual

694 miles traveled!!



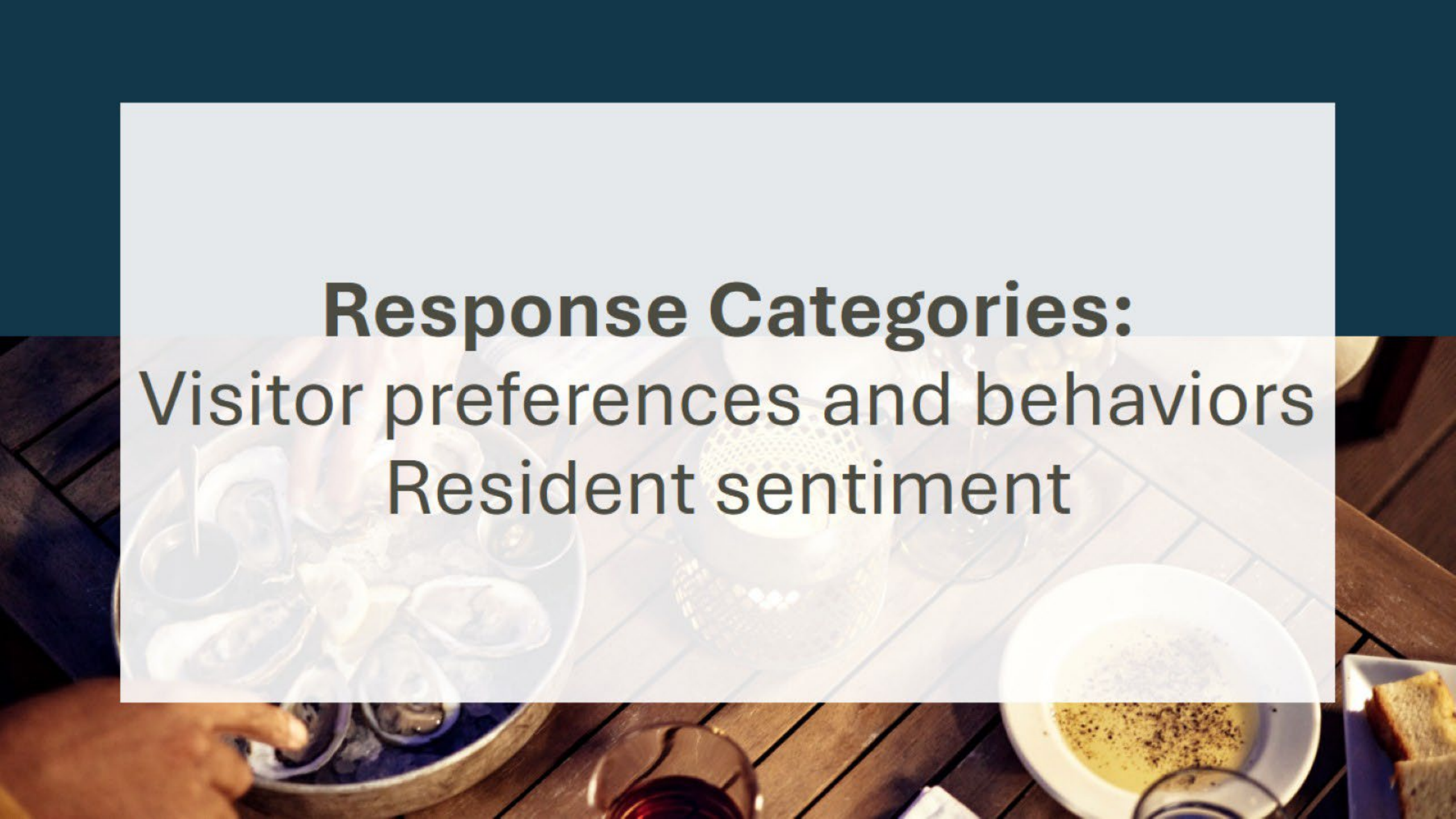
MAINE.
VISITMAINE.COM

Destination Management Plan -2025 Reset

Travel Trends

Waking Community Experience, Local culture	Love Sustainability if made	Willing to travel off-season for value	Want to spend local	Staycations	Great experience of some activities	More first-timers	Planning more, last minute changes for time to arrive	Shorter Booking Window	
Dog visitors (*)	Kid visitors	Families w/ kids + dogs	employee gatherings	multi-gen travel	Food events	Corporate visitors (meetings)	Out of state investors	NA curious people	
More people that are out of the market	Tourist in their own town	Marriotts, Hotels, Airbnbs	Luxury, Exclusive Experiences	Get out as big as a client	Signature "Business weekend"	Wellness travel	Spending is down	Increased in states w/ Direct Flights	More travel throughout the winter
Increase in high school students or teachers	Less reliance on booking	Resident Sentiment has more negative to tourists	Smaller drive Market	Increase in second and third party sites for hotels	Increase in group travel	Increased Diverse Outdoor Experiences	New Foster Markets: TX, VA, NC		
More Solo Travelers	High Lodging Age (60+)	Less camping gear	Business of Residents with close relationships	Limited or No Advance Research or destination	Social media for research or travel trends	Travelers looking for outdoor opportunities	Some travelers are paper plans/ guides	Planning towards travel	
Travelers will spend more to spend less on the ground	Travelers are working better & longer working without	Spots for vacation in the state with local travel							



The background image shows a close-up of a dining table. On the left, a white plate holds several oysters on ice. In the center, a glass of water is visible. To the right, a small white bowl contains melted butter with black pepper. A slice of bread is also visible on the far right. The table is made of dark wood.

Response Categories:

Visitor preferences and behaviors
Resident sentiment

Regional Maine Insights

Ellsworth

Combine nature with city experiences

Resident sentiment is challenging

Using print materials

No reservations

Bangor

Desire for easy intro to nature and guided experiences

Visitors are concentrated

Inexperienced in the outdoors

Regional Maine Insights

Houlton

Want a full experience
and less-traveled
destinations

Coming from close by
with no plan

More visitors from
farther away/better air
connections

Lewiston

Cultural experiences

Book lodging on arrival

Growth opportunities from
farther away

Regional Maine Insights

Machias

Love for small town main
street charm

Businesses appreciate
more business

Purchasing property
New summer peak in July-
October

Portland

Desire for an authentic
Maine experience
Luxury/wellness

Split sentiment

Less price sensitive
More diverse
Multi-gen travel parties
Last-minute bookings

Regional Maine Insights

Waterville

Experience and education
Variety of experiences

Residents feel pushed out

Not prepared for weather or
schedule based on weather
conditions

Part-time residents

Wells

Spending changes – more
on experiences, increased
price sensitivity

Feels busier to residents

Younger and from farther
away

Regional Maine Insights

Rockport

More experiences and longer trips

Split resident sentiment

Visitors are spending more but looking for value
Solo travelers
Shorter booking window

Virtual

Increase in golf and sports tourism
Cultural travel

Increases in fall
Residents don't want to lose Maine character

Looking for value
Shorter booking windows
Less planning – harder to get off the beaten path
Van and RV travelers

Themes from the Roadshow



Map out marketing to serve multiple goals

"Different regions of Maine have unique needs; the state should tailor support accordingly."



Maintain strong support of tourism businesses

"MOT should provide data and research support to help local organizations make informed decisions."



Focus stewardship message on educating visitors

"Involve visitors in eco-tourism initiatives like voluntourism to foster a deeper connection to Maine."



Balance tourism growth with resident sentiment

“Work to counteract the ‘From Away’ perception and educate residents on the benefits of tourism.”



Prioritize respect for and preservation of “working” Maine

"Promote Maine's traditional industries like forestry and fishing as part of the authentic visitor experience."



Broaden the definition of inclusivity for Maine in marketing

"Market the state and the offerings differently to different groups. Develop new visitors, be diverse in who we market to."



**Desire for MOT to fill the role as
convener of interest groups
and agencies**

*"Convene roundtables with MOT and other
state agencies to address shared challenges."*





Destination Management Plan 2025 Reset



Educating through impactful and inclusive storytelling that captures the multi-faceted cultural identity of Maine



Celebrating and preserving the authentic character of Maine.



Balancing promotion across destinations, seasons and experiences.




Upholding Maine's authenticity by showcasing Maine's local makers, artists, farmers, fishermen, and other independently owned businesses.



Encouraging responsible practices and behaviors that help to safeguard Maine's natural assets.

MOT's Stewardship Principles

An aerial photograph of a city, likely Portland, Maine, showing a dense urban landscape with various buildings, streets, and green spaces. A semi-transparent white rectangular box is overlaid on the upper half of the image, containing the text. The background image is slightly faded to make the text stand out.

**What do you wish more
visitors knew about Maine?**

What do you wish more visitors knew about Maine? (3-5 words)

0 2 8

(1/2)

- Mainers are resilient!
- Creativity, innovative, passionate people
- Depth of Arts and cultural experiences historical and current
- First Nations cultural tourism
- Maine is over 95% privately owned
- Four seasons destination!
- How much land is privately owned
- Winter is magical here too
- Hidden wilderness gems
- Beauty, adventure
- That there is a northern Maine
- History of area
- How cool the residents are. The Maine Way
- Lots of exciting opportunities in rural areas, not just coast
- How authentic it feels
- The vast nature here
- Wild, welcoming & Wonderous
- there's more to maine than Portland
- There's more than Portland and Acadia that's worth visiting
- Extent of travel between destinations.

What do you wish more visitors knew about Maine? (3-5 words)

0 2 8

(2/2)

- Find the less known town
- There's more to do than lobsters & lighthouses
- The great food scene
- Maine is safe and kid friendly
- how close/accessible everything is
- More than the coast and skiing
- Easier to get to than you think
- Heritage industries still exist
- Diverse weather
- it's more than Portland



MOT's marketing is designed to match visitors with the experiences across the state that benefit and enrich both the visitor and the community.





Destination Management Plan Reset

Highlights

Imperatives



Optimize Long-Term Economic Impact



Promote Destination Stewardship



Advance Destination Development



Prioritize Collaboration & Partnership

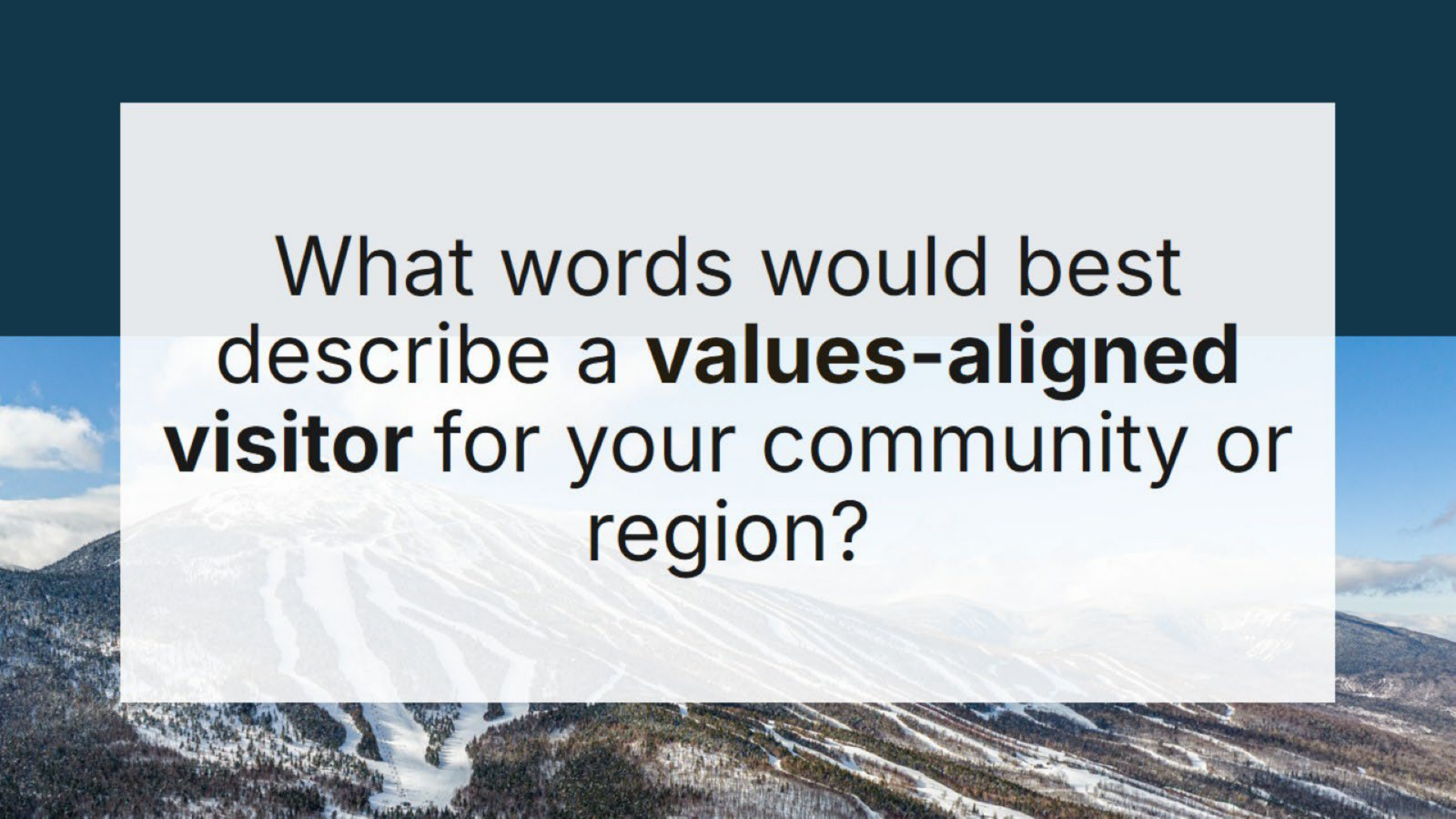


Enhance Organizational Effectiveness

Values-Aligned Visitors:

**Maine seeks out and welcomes visitors
who demonstrate stewardship, appreciation and care
for Maine, its people, its landscapes and its industries.**

Values-aligned visitors come from diverse backgrounds, all income levels and interests, and positively contribute to all parts of Maine.



What words would best describe a **values-aligned visitor** for your community or region?

What words would best describe a values-aligned visitor for your community or region?

030



Imperatives



Optimize Long-Term Economic Impact



Promote Destination Stewardship



Advance Destination Development



Prioritize Collaboration & Partnership



Enhance Organizational Effectiveness



Optimize Long-Term Economic Impact

1.1 Amplify the essence of Maine to attract values-aligned visitors who can act as stewards of Maine's experience and ethos

1.2 Invest in marketing intelligence and resources to improve effectiveness and enhance ROI for the MOT and industry partners.

1.3 Continue to expand diversification of new values-aligned visitors to and within Maine



Promote Destination Stewardship

2.1 Build awareness of destination stewardship resources for partners

2.2 Integrate responsible visitor messaging into all MOT communication channels

2.3 Support industry programs that encourage destination stewardship for natural and cultural resources



Advance Destination Development

- 3.1 Build industry and community awareness of destination development opportunities**
- 3.2 Equip and empower local communities with the tools to advance destination development**
- 3.3 Support and expand programs that improve tourism experience and facilitate product development**
- 3.4 Advocate for necessary infrastructure investment**



Prioritize Collaboration & Partnership

4.1 Evaluate and expand stakeholder communications and engagement to strengthen relationships with the tourism industry

4.2 Build and nurture the partnership network and identify collaboration opportunities

4.3 Fill the role of convener to facilitate collaboration and partnerships outside of MOT



Enhance Organizational Effectiveness

5.1 Foster positive and productive MOT team culture and work processes

5.2 Strategically invest in MOT staff professional development

Measures of Success



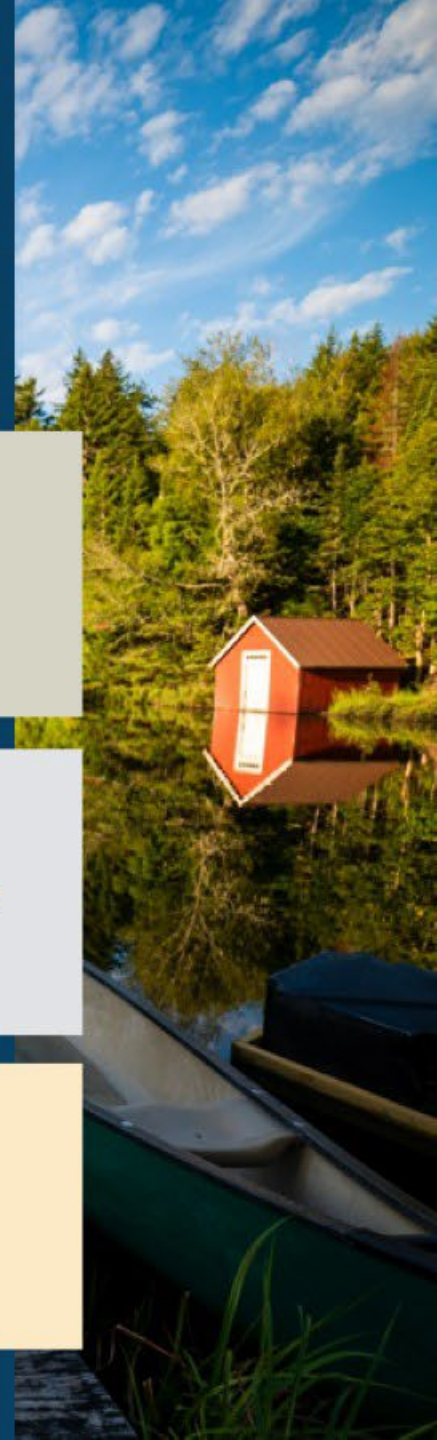
- Increased length of stay
- Increased visitation in all seasons



- Increase visitor awareness of destination stewardship
- Increase partner engagement to reach Maine's visitors with responsible travel resources



- Increased partner engagement with MOT programs



What approaches are you taking to increase length of stay? (1/2)

0 2 8

- Recommend other local activities
- Hire J1s to keep us open longer
- Incentivize connection
- Be inviting to our guests
- Offer lodging ideas, instead of having them just pass through
- Family events
- More programing, discounts for extended stay.
- Volunteer ambassadors that can offer suggestions to visitors
- Study travel trends
- Cross regional promotion
- Share what's happening more widely
- Share other opportunities to see/do during their visit
- Target All age groups
- Longer more immersive tours
- Keep them drinking local Maine beer.
- Slow travel
- Planning events in concert with other orgs
- Providing more specific information
- Heavy discount on extra nights on day of check out
- Share ideas

What approaches are you taking to increase length of stay?

(2/2)

0 2 8

- Creating more reasons for them to stay
- Collaboration
- Learning more about what Maine has to offer and how to market to the right people
- Customized itineraries and partnering with hiking guides and boat charters etc. for seamless logistics
- deal/packages/promotions
- Show people what to do
- Create suggested itineraries with activities and destination ideas that span longer days.
- Limitless itinerary building
- Varied experiences
- Encourage travel itineraries beyond my experience
- Enhance visitor experience
- stay in Belfast, do day trips, unpack once
- Add increased attractions to tours
- Provide options for activities
- More authentic events.
- Packaged experiences
- More to do

Measures of Success



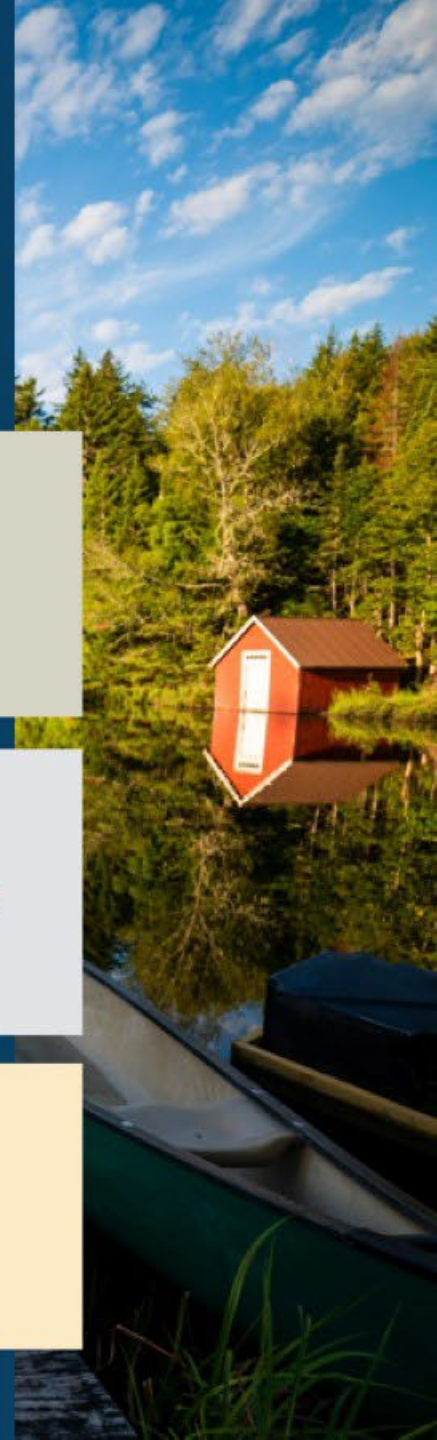
- Increased length of stay
- Increased visitation in all seasons



- Increase visitor awareness of destination stewardship
- Increase partner engagement to reach Maine's visitors with responsible travel resources



- Increased partner engagement with MOT programs



What can you do to increase visitor awareness of destination stewardship?

0 2 4

(1/2)

- Transparent info and marketing around supply chains and experiences
- don't take the rocks
- Make it easy for visitors to be eco friendly
- Develop a VisitMaine app
- Better advertising in out of state telling what we have
- Invest in training staff to be able to offer suggestions outside of town they are in.
- GPS location-based navigation
- Leave no trace
- Positive, validating marketing and communications
- Guides add to story telling
- Be authentic
- share community stories through video/social
- Let them "behind the scenes"
- carry in, carry out
- Marketing
- Share personal stories
- Guided experiences
- Wayfinding
- Easy to digest information
- Use common language

What can you do to increase visitor awareness of destination stewardship?

0 2 4

(2/2)

- in trip descriptions
- Be real
- Ensure accessibility to waste bins
pet waste etc
- Interweave into marketing
- Collaborate with local government
to get the word out
- Tell Maines story, it sells itself
- Share stories
- Visitor Information Centers
- Signage
- Demonstrate responsible behavior
- Social media
- Viral content

Measures of Success



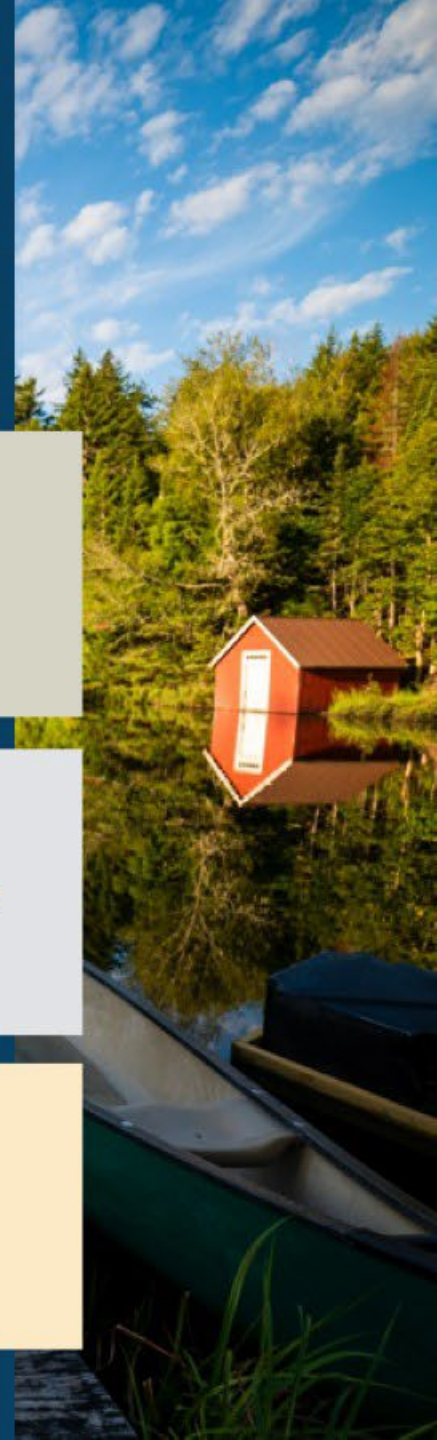
- Increased length of stay
- Increased visitation in all seasons



- Increase visitor awareness of destination stewardship
- Increase partner engagement to reach Maine's visitors with responsible travel resources



- Increased partner engagement with MOT programs



How will you increase your engagement with MOT programs?

(1/2)

0 1 8

- Make sure profit and marketing focuses Maine and the brand and content of MOT
- invite you to Our area
- Educational programing and collaboration
- Become a business partner not just a resident
- Pay attention!
- Host a webinar about j1 hiring
- Networking
- Continue to incorporate in our agritourism and entrepreneurship education materials in Cooperative Extension
- Show up more regularly to all MOT events
- Learn more about them
- Data analysis/trend utilization
- Get involved
- Attend more listening groups
- Encouraging others on the team to explore interests
- Be present to the next road show seminar
- Learning more about these available programs

How will you increase your engagement with MOT programs?

018

(2/2)

- Attend webinars and share info with stakeholders
- Feature and connect you with in state and out of state audiences
- Find partners in our own community and surrounding towns
- Continue welcoming interns

An aerial photograph of a city, likely New York City, showing a dense urban landscape with various buildings, streets, and a body of water in the distance. A large, semi-transparent white rectangular box is centered over the image, containing the word "Questions?".

Questions?

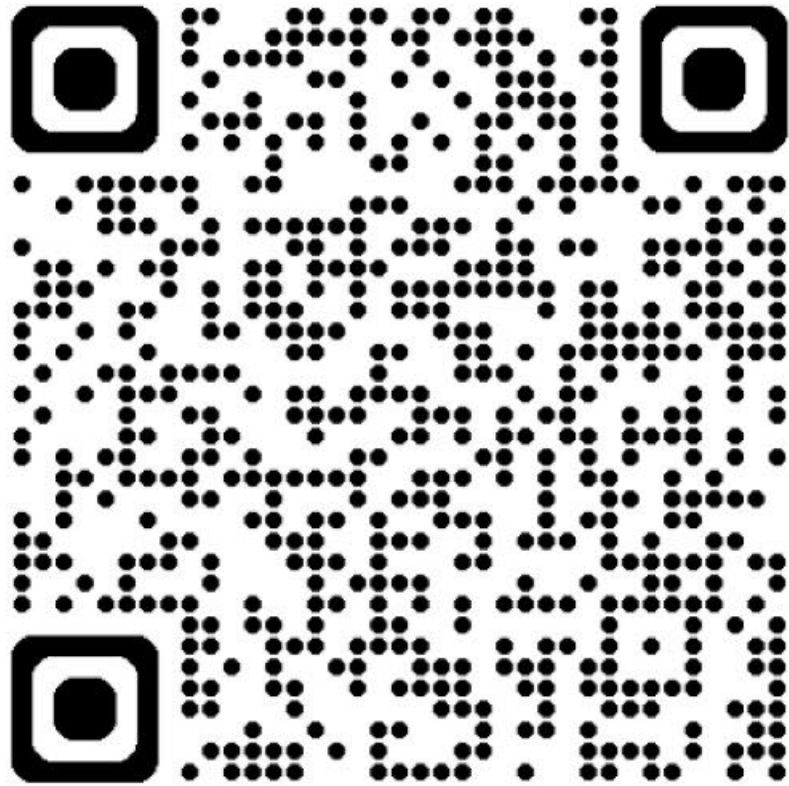
MAINE.
VISITMAINE.COM

Thank you!



Stay Engaged!

www.MOTPartners.com



MAINE. 
VISITMAINE.COM 
coraggiogroup