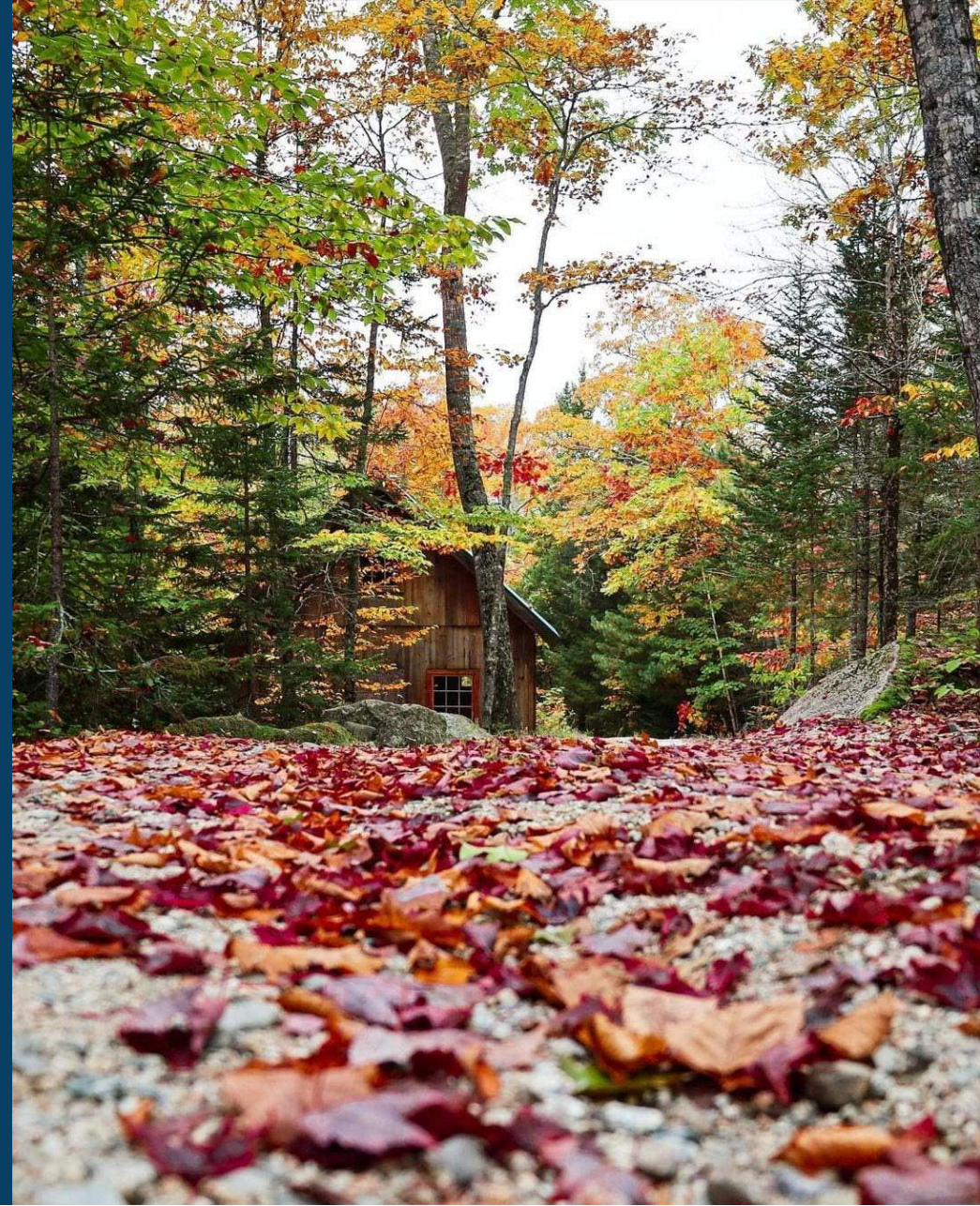


MAINE OFFICE OF TOURISM

2023 Fall Visitor Tracking Report

SEPTEMBER – NOVEMBER 2023



SEASONAL SNAPSHOT

FALL 2023



12,997,500

VISITOR
DAYS

- 3.5%



2,733,900

TOTAL
VISITORS

- 2.1%



\$1,918,341,700

DIRECT
SPENDING

+ 4.6%

vs. 2022

- » In Fall 2023, there was an **increase in room nights (+1.7%)** and **visitor spending (+4.6%)**
 - » The accommodation spending increase was consistent with the increase in taxable lodging sales, but there was stronger growth in other spending areas such as restaurants and entertainment
- » Compared to the previous year, occupancy decreased slightly (-6.7%), yet there was an **increase in room nights (+1.7%)** due to a **slightly more visitors staying in paid accommodations and more available units**
- » Compared to last year, **more visitors would definitely recommend the specific region they visited (+11% points)**, **definitely return to Maine (+10% points)**, and more visitors were **very satisfied** with their trip **(+13% points)**
- » Visitors' ratings of Restaurants and the Friendliness of People significantly increased this fall (+6% points and +5% points)
- » Compared to last year, more visitors were from coming from out of state (+7% points)
- » More visitors considered other destinations in addition to Maine while planning their trip (+5% points)
- » There were more visitors who had previously visited Maine 11+ times (+6% points)
- » More visitors flew to Maine (+5% points)

EXECUTIVE SUMMARY



VISITOR JOURNEY: IMPACT OF TOURISM



KEY PERFORMANCE INDICATORS

The number of visitor days in Fall 2023 decreased by -3.5% compared to last fall. Occupancy and the number of day trippers dropped slightly resulting in fewer total visitors in Fall 2023. Visitor spending was up +5.6%, in line with an increase of Maine Taxable Lodging Sales. The accommodation spending increase was consistent with the increase in taxable lodging sales, but there was stronger growth in other spending areas such as restaurants and entertainment

KPIs	2022	2023	Δ% from '22
Visitors (#)	2,791,200	2,733,900	- 2.1%
Visitor Days ¹	13,467,600	12,997,500	- 3.5%
Direct Spending	\$1,834,757,800	\$1,918,341,700	+ 4.6%
Room Nights	3,209,200	3,262,900	+ 1.7%

¹ Visitor Days is the total number of days spent by visitors in the state of Maine. This include overnight visitors and day trippers.

VISITATION METRICS

Visitation ¹	Maine Residents	Out-of-State Visitors	Total
Visitor (#)	437,400	2,296,500	2,733,900
Visitor (%)	16%	84%	100%

¹ Visitation estimates provided here are **preliminary** and reflect visitation from September – November 2023. Adjustments will be made to these estimates at the end of the year to account for seasonal fluctuations.

LODGING METRICS*

Occupancy Rate

55.3%

- 6.7% from 2022

Average Daily Rate

\$174.95

- 0.2% from 2022

Revenue per Available Room

\$96.82

- 6.9% from 2022

*More units were available in Fall 2023.

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » **76%** of visitors started planning their trip a month or more in advance of their trip
- » **41%** of visitors have a booking window of more than 3 months



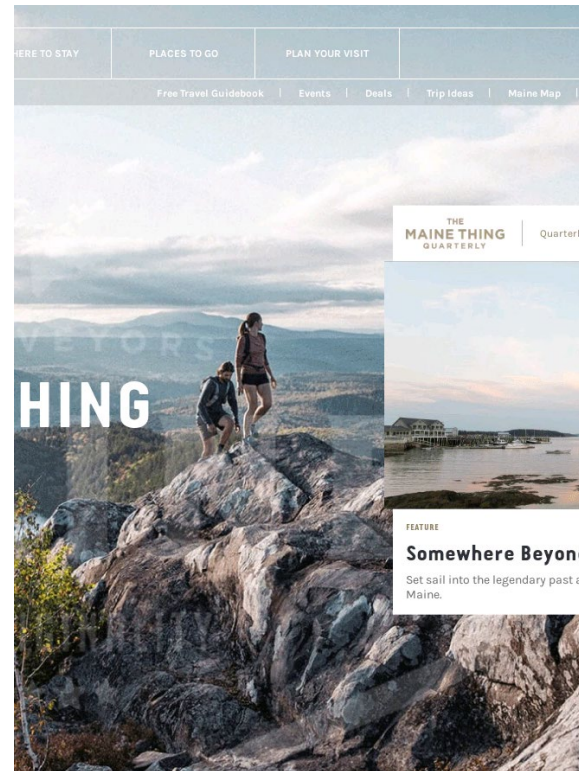
TOP TRIP PLANNING SOURCES*



36% Advice from family/friends



33% Online search engines



19% VisitMaine.com



20% Online travel agency

TOP REASONS FOR VISITING*



40% Sightseeing and touring



34% Relax and unwind



26% Visit friends/family

CONSIDERING MAINE AS A DESTINATION

- » Nearly **3 in 5** visitors considered visiting **ONLY** Maine while planning their trips (-5% points from 2022)
- » Visitors continued to be more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces



TV SHOWS & FILM*

- » **4%** of visitors said a TV show or film inspired their trip to Maine
- » **41%** of visitors who were inspired by a TV show or film said it made them think about Maine as a place to visit



*Questions were not asked until January 2023.

PRE-TRIP EXPOSURE TO ADVERTISING

- » Nearly **half** of visitors noticed advertising or promotions for Maine prior to their trip (-4% points from 2022)
- » This information influenced **22% of all** visitors to visit Maine (-6% points from 2022)



TOP SOURCES OF ADVERTISING EXPOSURE*

Base: 46% of visitors who noticed advertising



49% Social media



31% Internet

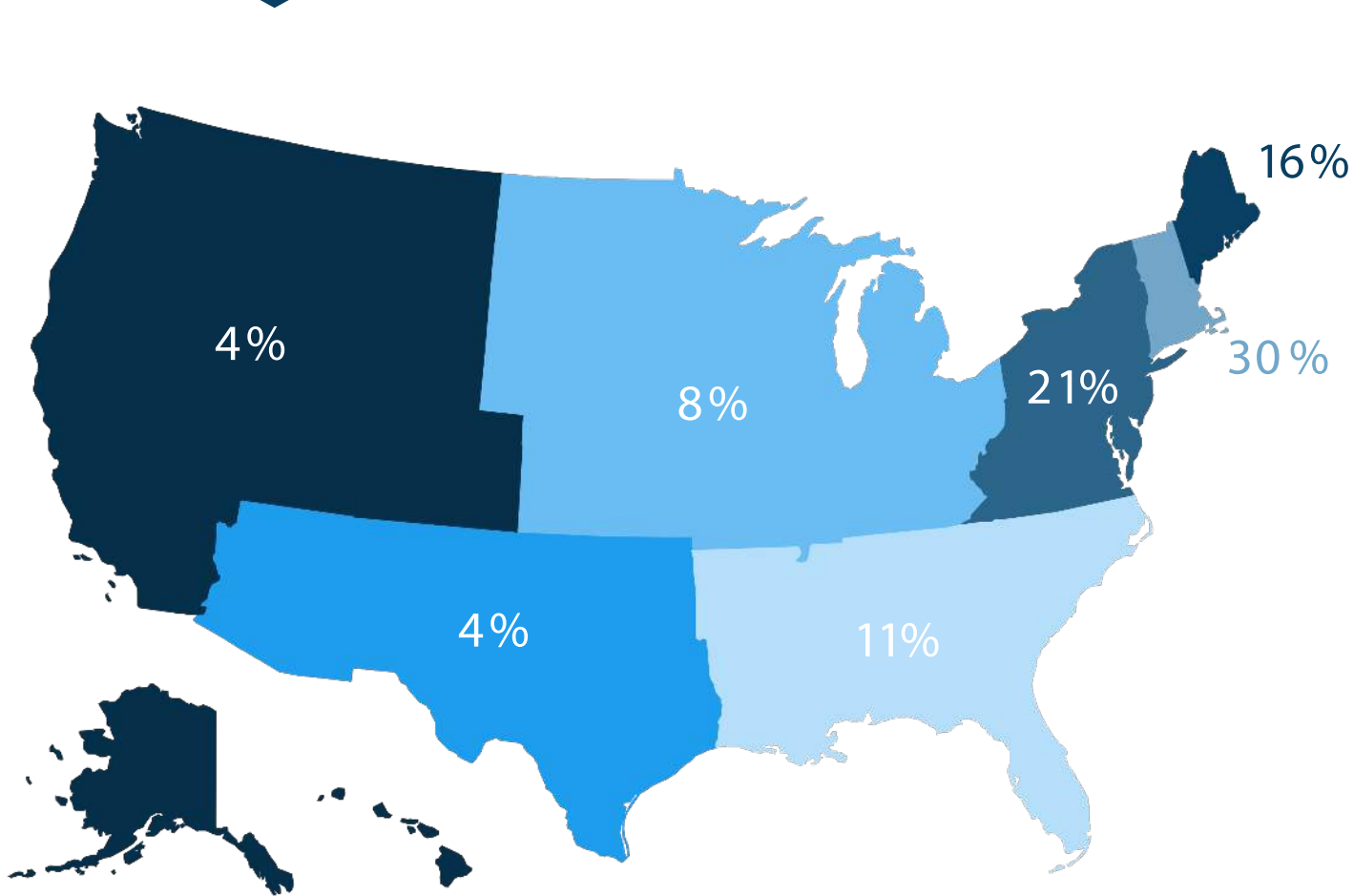


23% Magazine

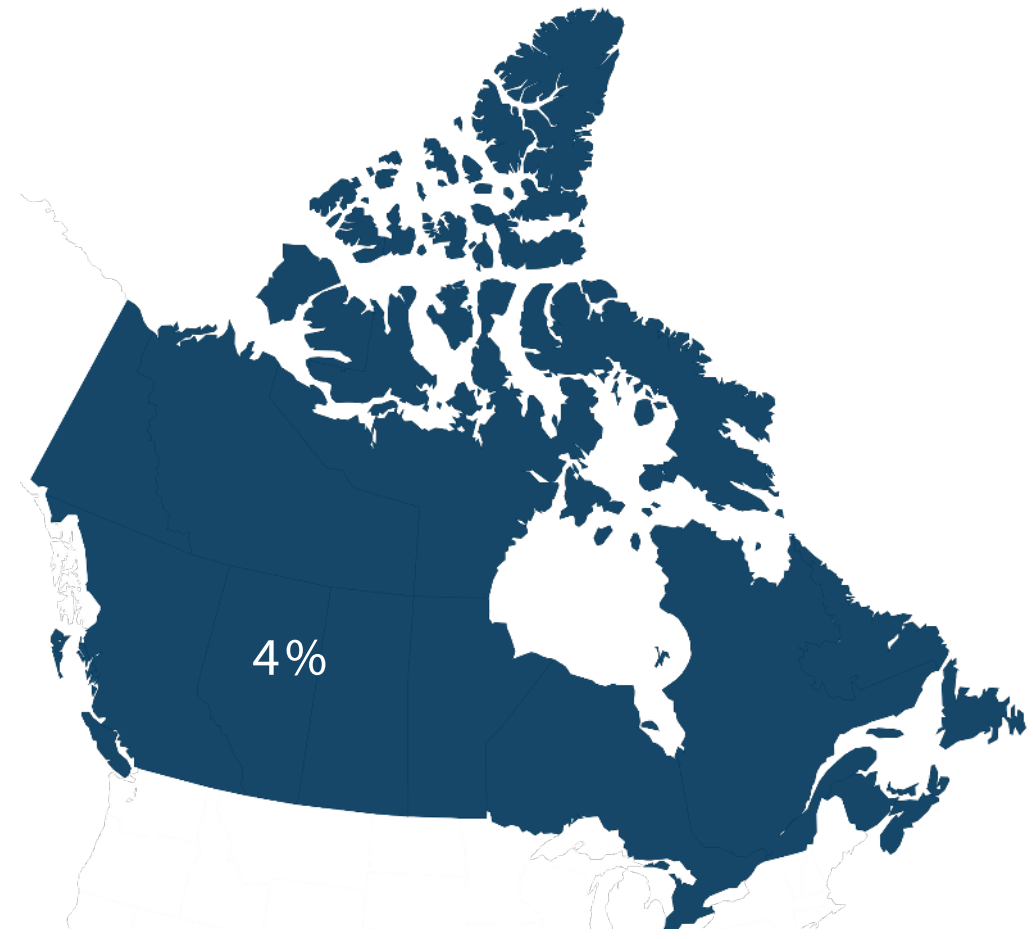
VISITOR JOURNEY: TRAVELER PROFILE



REGIONS OF ORIGIN

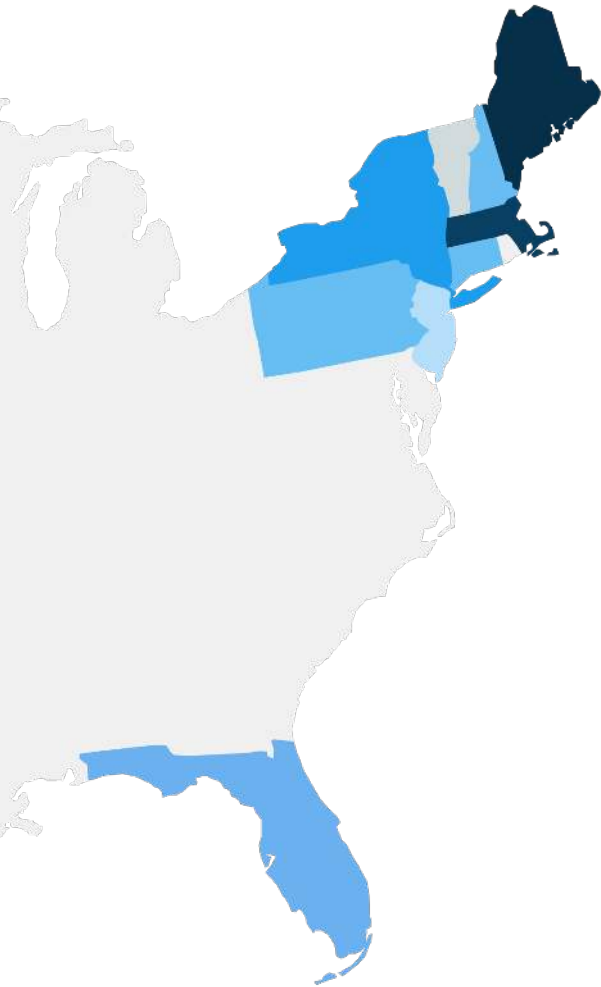


2% of visitors came from outside of the United States and Canada.



4% of visitors came from Canada.

TOP ORIGIN STATES & PROVINCES



63%

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

- 16 % Maine
- 15 % Massachusetts
- 9 % New York
- 6 % New Hampshire

- 5 % Connecticut
- 4 % Florida
- 4 % Pennsylvania
- 4 % New Jersey

TOP ORIGIN MARKETS



9% Boston



7% New York City¹



2% Washington DC – Baltimore²

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

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

TRAVEL PARTIES

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



12% visitors traveled with at least one person under the age of 18 in their travel party



DEMOGRAPHIC PROFILE

» The typical Maine visitor:

- » Is **53** years old¹
- » Female² - **56%**
- » Is white – **88%**



¹ Median age.

² Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Maine visitor:
 - » Is a college graduate – **79%**
 - » Is married/in a domestic partnership – **78%**
 - » Is employed full-time – **53%**
 - » Has an annual household income¹ of **\$97,400**



¹ Median household income.

NEW & RETURNING VISITORS

- » 24% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 32% had previously traveled in Maine more than 10 times



VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

- » Maine is a drive-market for most visitors, with **78%** choosing to travel by car over plane, motor coach/bus, or train (-7% points from 2022)
- » Most visitors who flew to Maine arrived at Boston Logan International Airport or Portland International Jetport



NIGHTS STAYED

- » **88%** of visitors stayed one or more nights in Maine on their trip (+2% points from 2022)
- » Typical visitors stayed **4.8*** nights in Maine on their trips



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

TOP ACCOMMODATIONS



40% Hotel/motel/resort

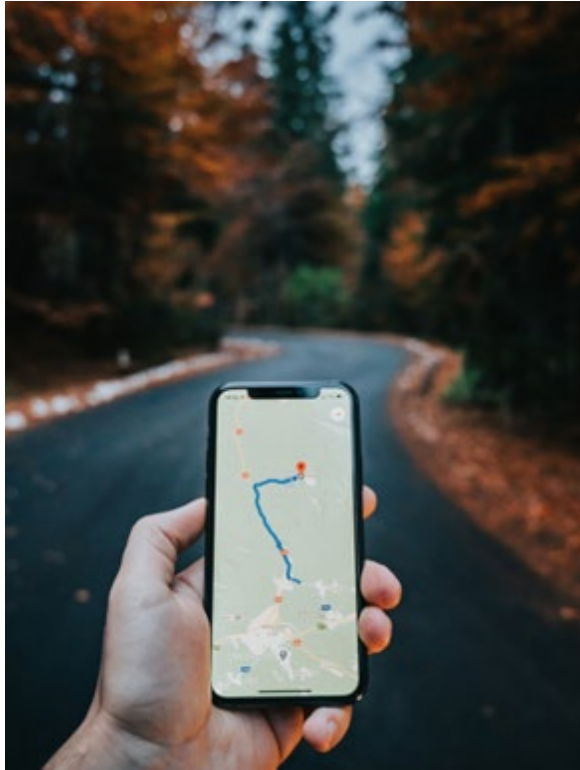


14% Friends/family home



12% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*



50% Navigation website/apps (Google Maps, etc.)



27% Restaurant website/app



25% Visitor information center



23% Materials from hotel/campground

TOP VISITOR ACTIVITIES*



78% Food/beverage/culinary



62% Touring/sightseeing



55% Shopping

VISITING OTHER STATES & PROVINCES

- » **3 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » Nearly **1 in 5** visitors also visited New Hampshire or Massachusetts while on their trip to Maine



TRAVELING WITHIN MAINE

- » Nearly **half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+5% points from 2022)
- » **43%** of visitors visited the Maine Beaches in addition to their primary destination within Maine (+12% points from 2022)



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
- » **97%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **77%** would definitely recommend



LIKELIHOOD OF RETURNING TO MAINE

- » **93%** of visitors will return to Maine for a future visit or vacation
- » **75%** of visitors were highly satisfied with their trip in Maine and will “definitely return” in the future



SATISFACTION

- » **99%** of visitors were satisfied with their trip to Maine
- » Over **2 in 3** visitors were very satisfied with their trip to Maine



OVERCROWDING

- » 47% of visitors thought the number of visitors during their trip to Maine was fine
- » 28% of visitors thought it was a little overcrowded



UNIQUENESS

"Top notch Oktoberfests on the Beer Trail."



"Unique natural landmarks, an amazing rocky coastline, friendly inhabitants, a relaxing and peaceful environment, many activities, excellent seafood, fine shopping."



"Where to start? Beautiful scenery (particularly in the fall), ocean views, great food scene and a relaxed pace of living."



QUESTIONS?

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

