AROOSTOOK COUNTY

2023 Economic Impact & Tracking Report

DECEMBER 2022 – NOVEMBER 2023

MAINE.
VISITMAINE.COM

downs & st. germain
RESEARCH

STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Maine from December 2022 to November 2023.
In the report, we follow the visitors in their journeys from pre-trip planning to the impact of their expenditures in the state.
Along the way, we examine profiles of visitors, their experiences in our destination, and how they evaluate experiences in Maine.

Pre-Visit

- Planning cycle
- Planning sources
- Reasons for visiting
- Other considered destinations
- Exposure to advertising
- Advertising sources

Traveler Profile

- Visitor origin
- Travel party composition
- Visitor demographics
- Previous visits

Trip Experience

- Visitor transportation
- Nights stayed
- Accommodations
- Booking methods
- Trip resources
- Visitor activities
- Expectations vs. experience
- Visitor spending
- Included amenities
- Other areas visited

Post-Trip Evaluation

- Uniqueness of Maine
- Highlight of trip
- Recommending Maine
- Satisfaction with trip
- Likelihood of returning
- Perceptions of Maine

Impact of Tourism

- Visitor direct spending
- Number of visitors
- Room nights generated
- Occupancy rate
- Average daily room rates
- Revenue per available room

EXECUTIVE SUMMARY

AROOSTOOK COUNTY

Compared to visitors to other regions, visitors to Aroostook County region are more likely to:

- Have a shorter planning and booking window
- Use VisitAroostook.com to plan their trip
- Be from other areas of Maine or Canada
- Travel alone
- Stay overnight in a friend/family home
- Participate in active outdoor activities, enjoy mountain views, and snowmobile
- Also visited The Maine Highlands on their trip
- Say the Friendliness of People and being Authentic and Unique exceeded their expectations

VISITOR JOURNEY: IMPACT OF TOURISM

ECONOMIC IMPACT

Visitor spending generated

$255,058,200

in economic impact to Aroostook County's economy, up **3.5%** from 2022

DIRECT SPENDING

Visitors to Aroostook County spent

$169,599,300

throughout the county in 2023 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **5.5%** from 2022

VISITORS

Aroostook County attracted

332,400

visitors in 2023, up **17.5%** from 2022

VISITORS DAYS*

All visitors to Aroostook County spent

1,238,700

days in Aroostook County throughout 2023,
up **12.1%** from 2022

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

ROOM NIGHTS

Visitors to Aroostook County generated

240,700

nights in Aroostook County accommodations throughout 2023, up **20.2%** from 2022

JOBS SUPPORTED*

Visitors to Aroostook County support

2,260

jobs throughout the county in 2023, down **14.7%** from 2022

*Changes in jobs supported are largely due to year over year differences in IMPLAN modeling, however, there is a national trend of hotels employing fewer people.

WAGES GENERATED

Visitors to Aroostook County supported

$80,543,300

in wages paid to Aroostook County employees in 2023, up **6.3%** from 2022

VISITORS & JOBS

Every

147

visitors supports a new job in Aroostook County

HOUSEHOLD SAVINGS

Visitors to Aroostook County saved local households

$893

in state and local taxes in 2023

LODGING METRICS*

Occupancy Rate

52.1%

+ 3.9% from 2022

Average Daily Rate

$138.69

+ 3.9% from 2022

Revenue per Available Room

$72.19

+ 8.0% from 2022

*Lodging metrics include all paid accommodations type like hotels, vacation rentals, B&B, etc.
Sources: Key Data & STR.
More units available in 2023.

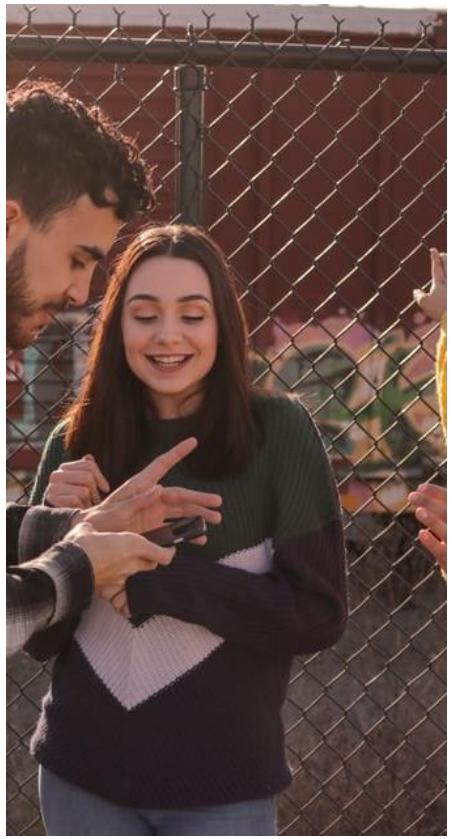
VISITOR JOURNEY: PRE-VISIT

TRIP PLANNING CYCLE

- 62% of visitors started planning their trip a month or more in advance of their trip

- 70% of visitors have a booking window of more than 3 months

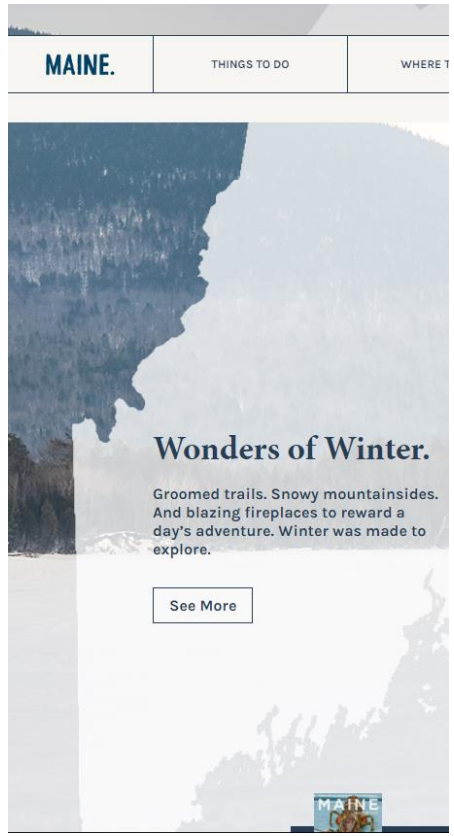
TOP TRIP PLANNING SOURCES*



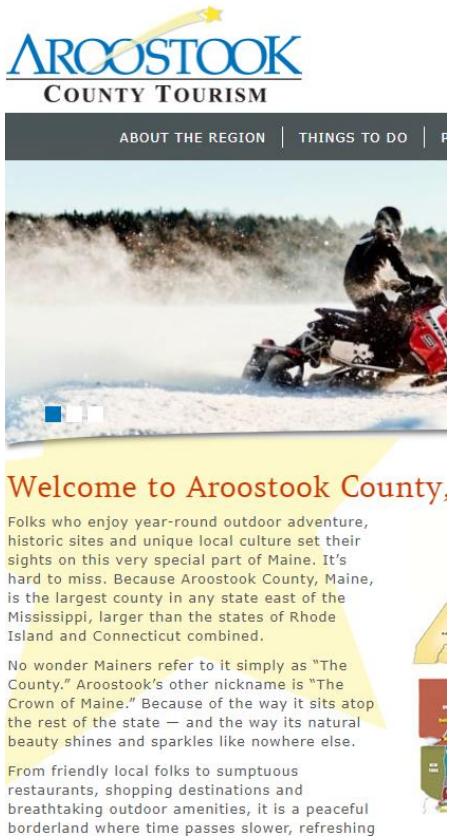
31% Advice from family/friends

26% Online search engines

18% Online travel agency



14% VisitMaine.com



14% VisitAroostook.com

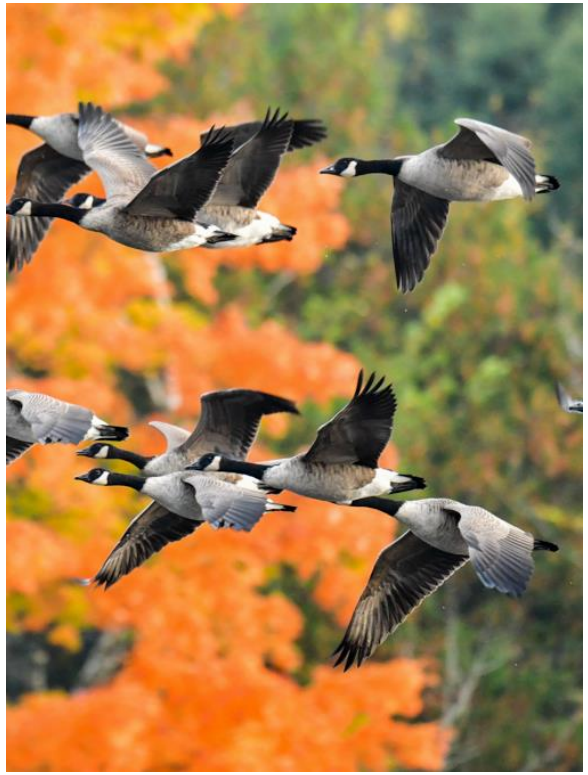
*Multiple responses permitted.

TOP REASONS FOR VISITING*

33% Visit friends/family

24% Sightseeing and touring

23% Relax and unwind



20% Nature & bird watching

*Multiple responses permitted.

MAINE.
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CONSIDERING MAINE AS A DESTINATION

- Nearly 7 in 10 visitors considered visiting ONLY Maine while planning their trips (-2% points from 2022)

- Visitors continued to be more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces

TV SHOWS & FILM*

- 8% of visitors said a TV show or film inspired their trip to Maine
- 37% of visitors who were inspired by a TV show or film said visiting a location related to a TV show or film was the main reason I visited Maine

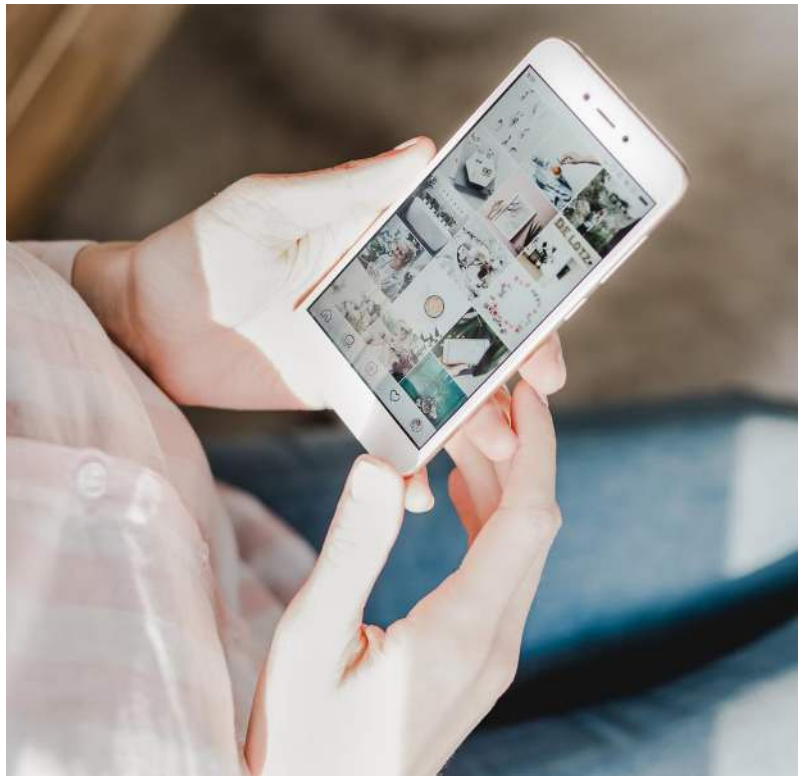
*Questions were not asked until January 2023.

PRE-TRIP REACALL OF ADVERTISING

- 2 in 5 visitors recalled advertising or promotions for Maine prior to their trip (-1% point from 2022)
- This information influenced 26% of all visitors to visit Maine

TOP SOURCES OF ADVERTISING RECALL*

Base: 40% of visitors who recalled advertising



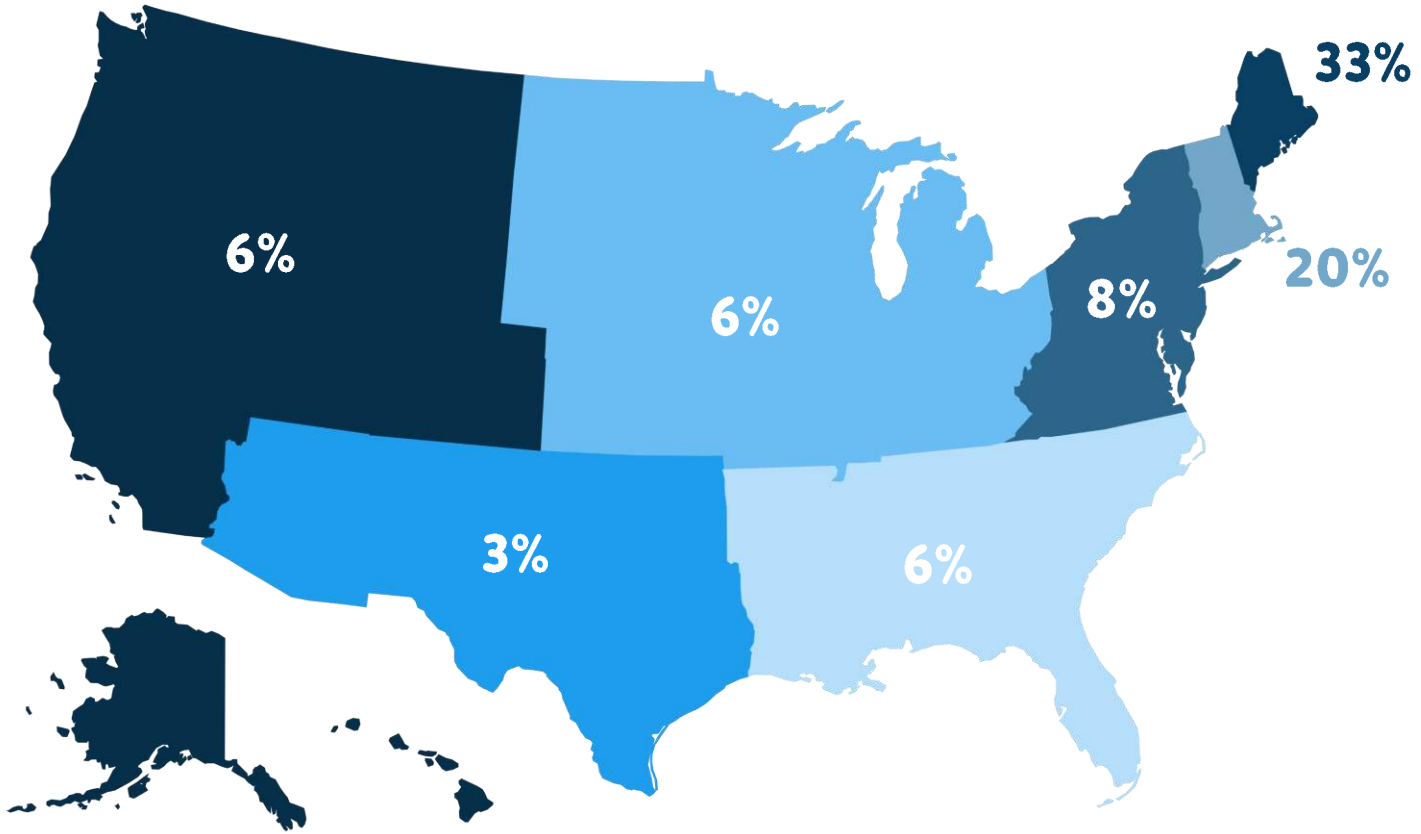
38% Social media

30% Internet

*Multiple responses permitted.

VISITOR JOURNEY: TRAVELER PROFILE

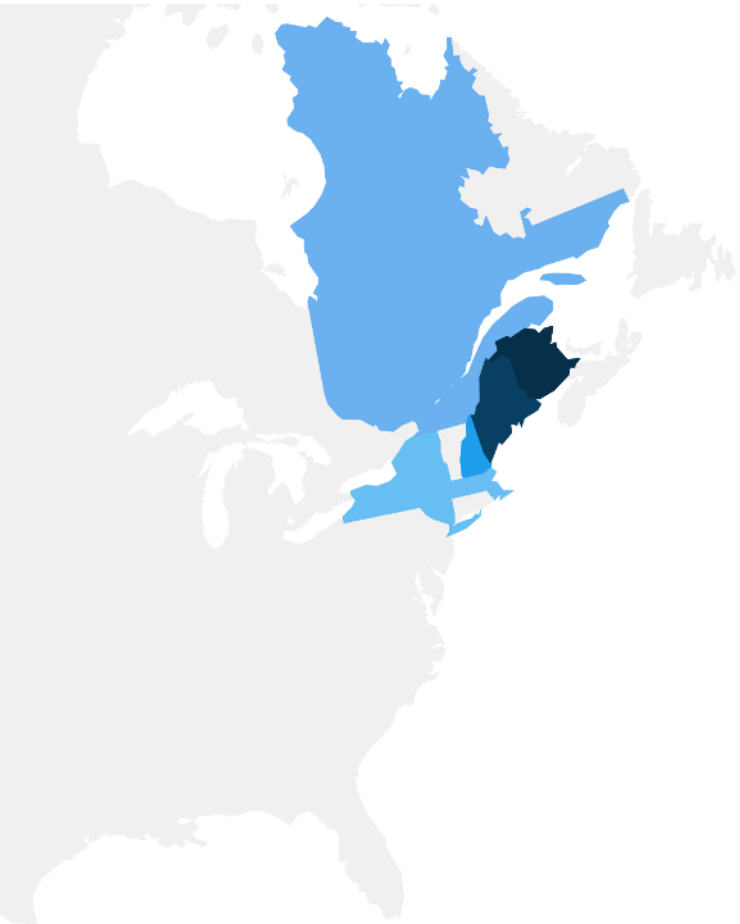
REGIONS OF ORIGIN



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

17% of visitors came from Canada.

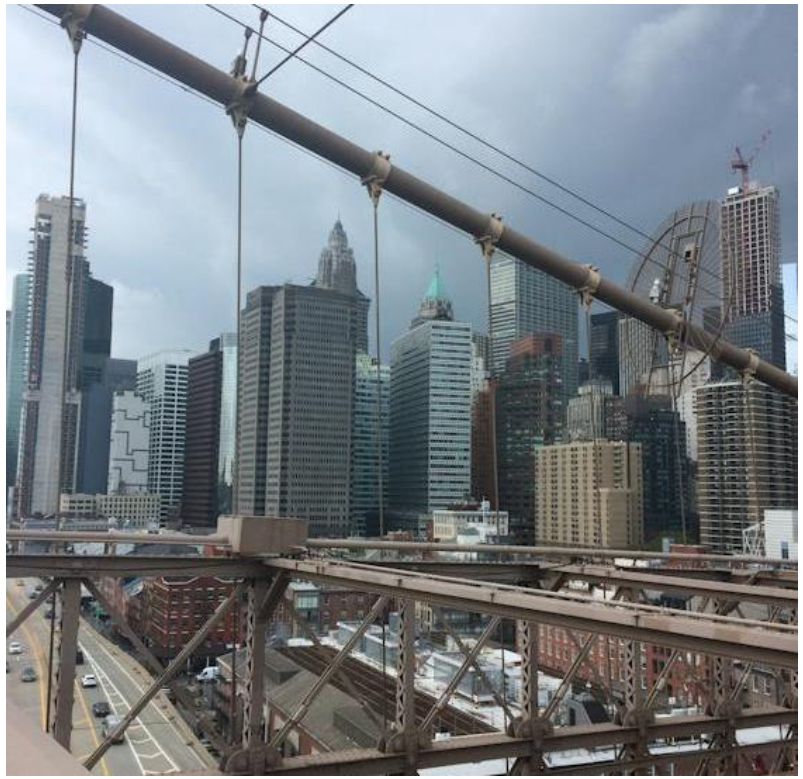
TOP ORIGIN STATES & PROVINCES



70% of visitors traveled from 7 U.S. states, including from other regions of Maine.

- 33 % Maine
- 11 % New Brunswick
- 10 % New Hampshire
- 6 % Massachusetts
- 4 % Quebec
- 3 % Florida
- 3 % New York

TOP ORIGIN MARKETS



6% Rochester-Portsmouth, NH

4% Bangor

4% Portland

TRAVEL PARTIES

The typical Maine visitor traveled with 2.3 people in their visitor party

14% visitors traveled with at least one person under the age of 18 in their travel party

VISITOR PROFILE

- The typical Maine visitor:
  - Is 49 years old[1]
  - Is white – 89%
  - Is a college graduate – 61%
  - Is married/in a domestic partnership – 71%
  - Is employed full-time – 57%
  - Has an annual household income[2] of $83,800

[1] Median age.
[2] Median household income.

NEW & RETURNING VISITORS

- 21% of visitors were traveling in Maine for the first time

- Maine has high repeat and loyal visitors, as 33% had previously traveled in Maine more than 10 times

VISITOR JOURNEY : TRIP EXPERIENCE

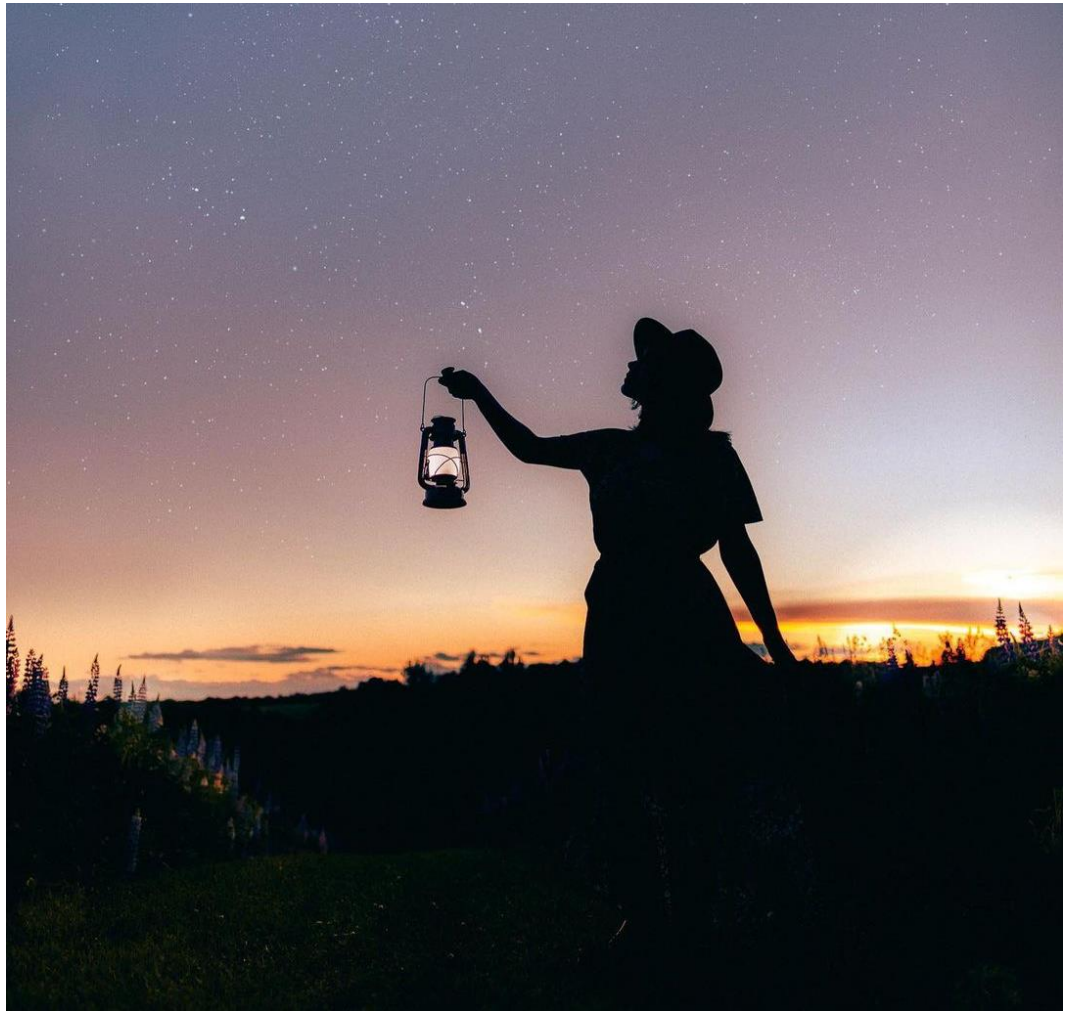
TRANSPORTATION

- Maine is a drive-market for most visitors, with 77% choosing to travel by car over plane, motor coach/bus, or train

- Most visitors who flew to Maine arrived at Bangor International Airport or Boston Logan International Airport

NIGHTS STAYED

- 83% of visitors stayed one or more nights in Maine on their trip
- Typical visitors stayed 3.7* nights in Maine on their trips



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

TOP ACCOMMODATIONS

30% Friends/family home

23% Hotel/motel/resort

17% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*

40% Navigation website/apps (i.e., Google or Apple Maps, etc.)

tripadvisor

17% Trip planning app

16% Visitor information center

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*

50% Active outdoor activities

48% Touring/sightseeing

46% Food/beverage/culinary

*Multiple responses permitted.

VISITING OTHER STATES & PROVINCES

- 7 in 10 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

- Nearly **half** of 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

- 97% 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 – 83% would definitely recommend (+6% points from 2022)

LIKELIHOOD OF RETURNING TO MAINE

- 96% of visitors will return to Maine for a future visit or vacation
- 77% of visitors will "definitely return" in the future

SATISFACTION

- 99% of visitors were satisfied with their trip to Maine
- Over 7 in 10 visitors were very satisfied with their trip to Maine

OVERCROWDING

- 46% of visitors thought the number of visitors during their trip to Maine was fine (+12% points from 2022)

- 12% of visitors though it was a little overcrowded

DETAILED FINDINGS

VISITOR JOURNEY: IMPACT OF TOURISM

KEY PERFORMANCE INDICATORS

Economic Impact	2021	2022	2023	Δ% from '22
Number of Visitors	286,300	282,900	332,400	+ 17.5%
Visitor Days*	NA	1,105,200	1,238,700	+ 12.1%
Room nights generated	160,600	200,200	240,700	+ 20.2%
Direct expenditures	$141,986,400	$160,705,800	$169,599,300	+ 5.5%
Total economic impact	**$218,063,100**	**$246,453,400**	**$255,058,200**	**+ 3.5%**

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

EMPLOYMENT IMPACTS

Aroostook County Jobs	2021	2022	2023	Δ% from '22
Jobs supported (direct)	1,900	2,100	1,800	- 14.3%
Total jobs supported	2,500	2,650	2,260	- 14.7%*

Aroostook County Wages	2021	2022	2023	Δ% from '22
Wages paid (direct)	$48,074,200	$54,005,300	$58,890,200	+ 9.0%
Total wages paid	$67,358,700	$75,777,400	$80,543,300	+ 6.3%

*Changes in jobs supported are largely due to year over year differences in IMPLAN modeling, however, there is a national trend of hotels employing fewer people.

RETURN ON INVESTMENT

Return on Investment	2021	2022	2023
Visitors per job supported	115	107	147
State & local taxes supported	$20,606,600	$22,977,900	$26,106,400
Tax savings per household	$698	$794	$893

LODGING METRICS*

Lodging Metrics	2021	2022	2023	Δ% from '22
Occupancy Rate (%)	41.4%	50.1%	52.1%	+ 3.9%
Average Daily Rate	$121.18	$133.48	$138.69	+ 3.9%
RevPAR	$50.17	$66.87	$72.19	+ 8.0%
Total Lodging Revenue**	$27,757,000	$34,197,100	$34,556,300	+ 1.1%

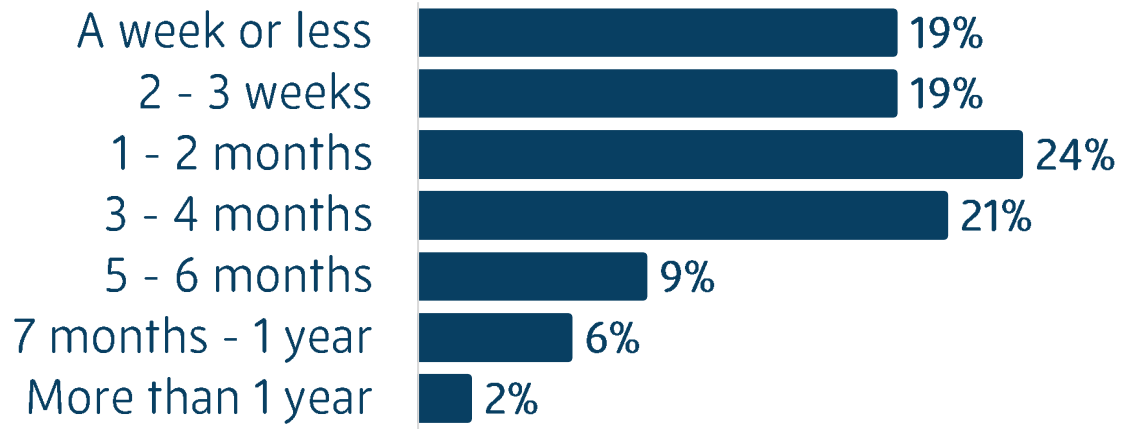
*Lodging metrics include all paid accommodations type like hotels, vacation rentals, B&B, etc.
Sources: Key Data & STR.
More units available in 2023.
**Source: State of Maine Revenue Services.

VISITOR JOURNEY: PRE-VISIT

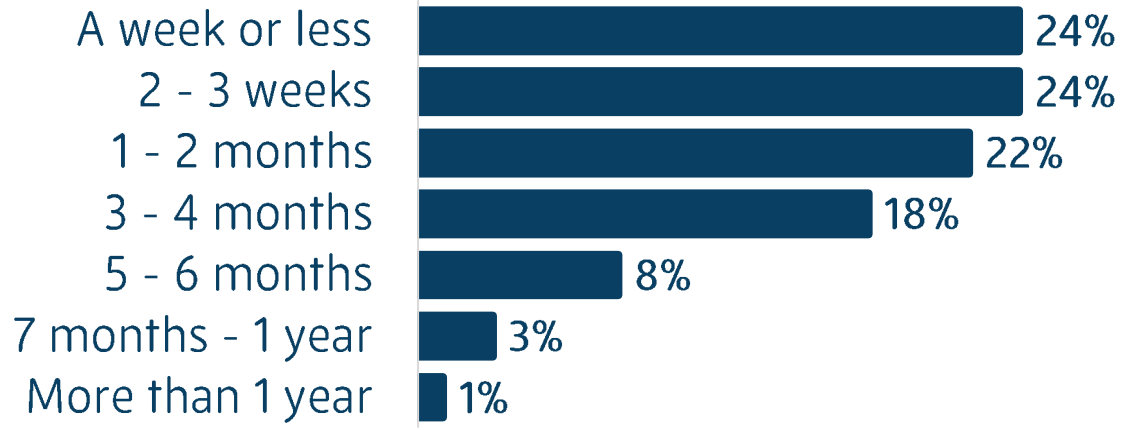
TRIP PLANNING CYCLE

- Typical visitors began planning their trip 45 days in advance (+7 days from 2022)
- 62% of visitors started planning their trip a month or more in advance of their trip
- Typical visitors booked their accommodations 33 days in advance (+13 days from 2022)
- 70% of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

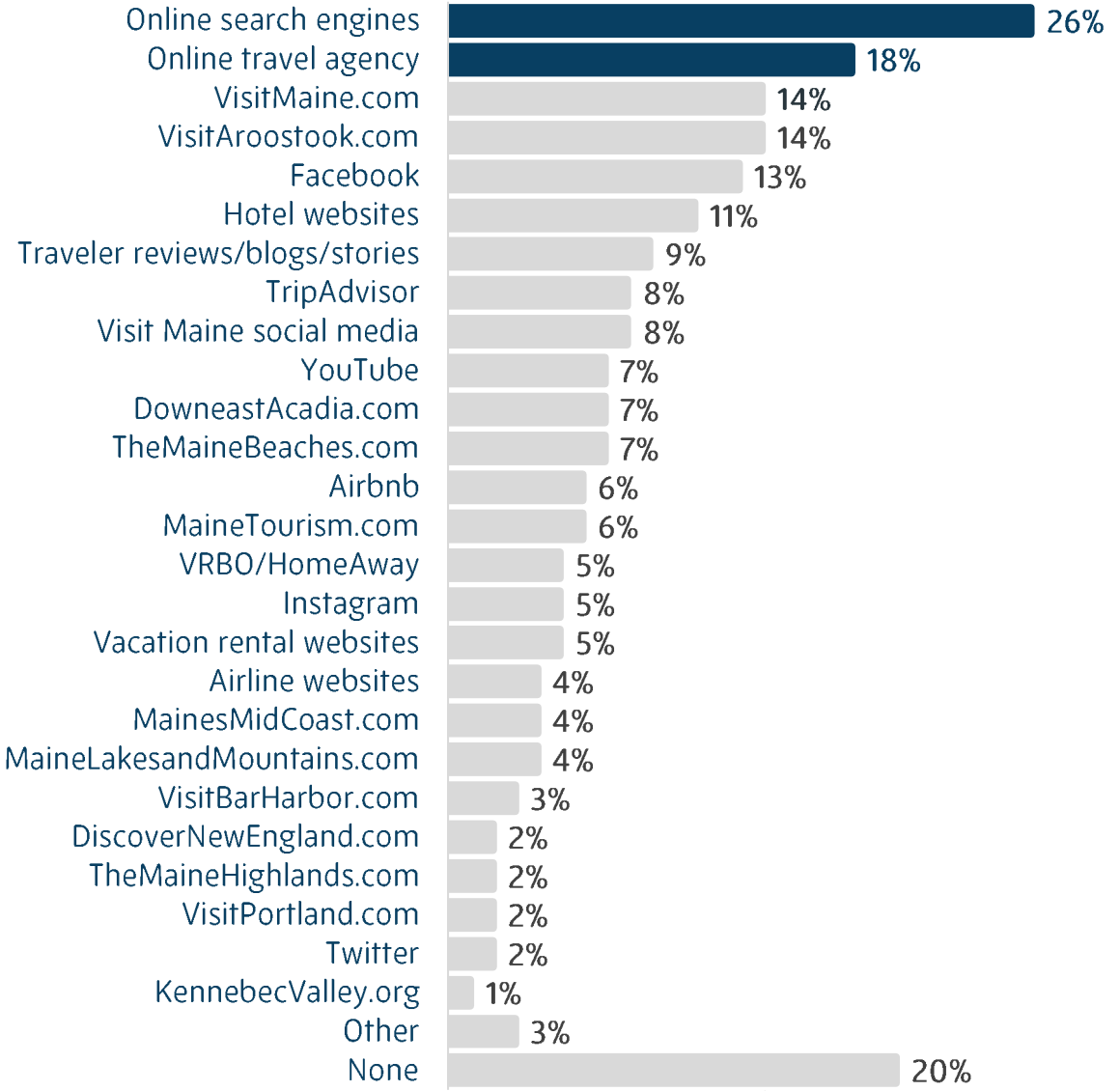


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

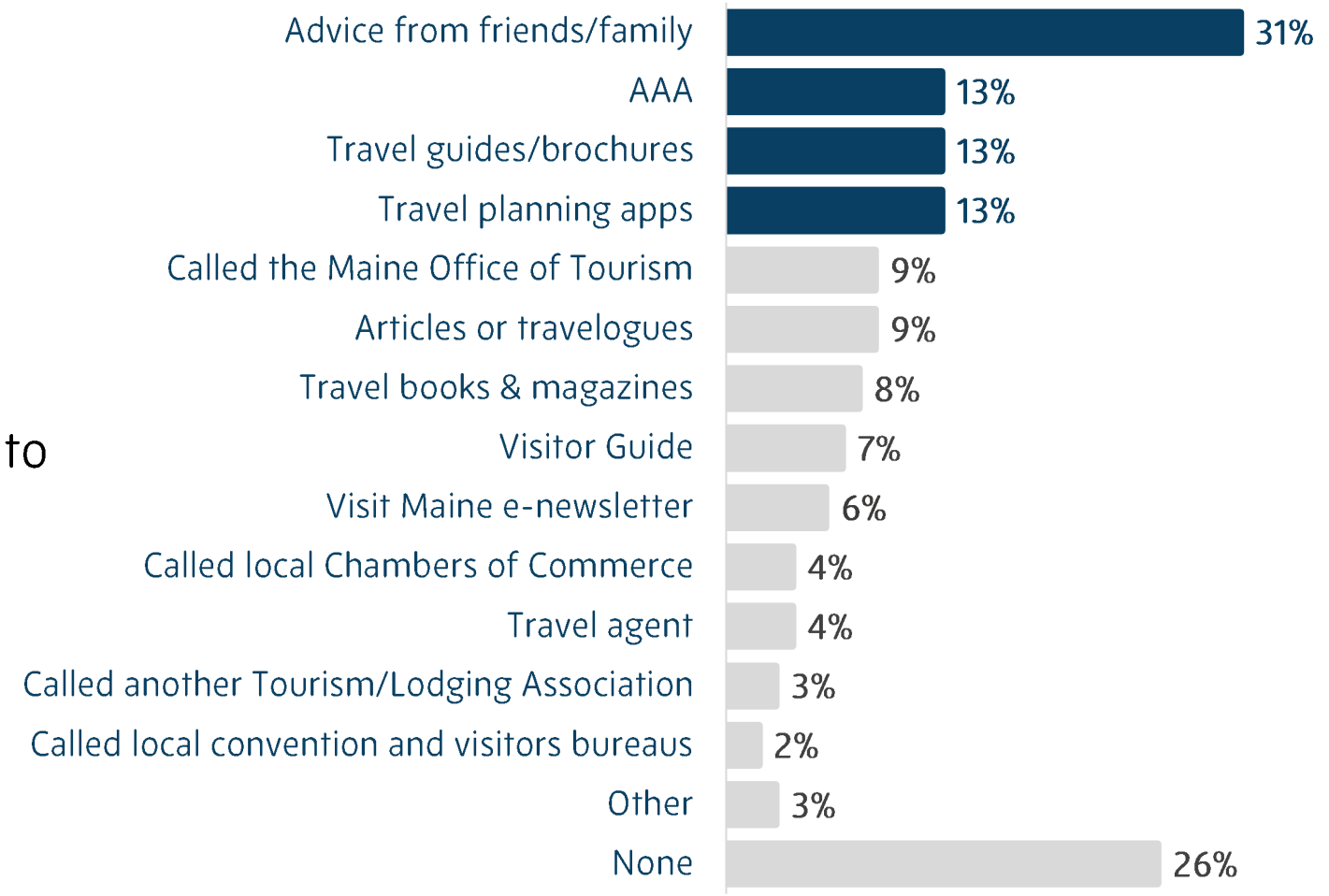
- 4 in 5 visitors used one or more online resources to help them plan their trip in Maine
- Over 1 in 4 visitors used an online search engine, such as Google, to help them plan their trip in Maine
- Nearly 1 in 5 visitors used an online travel agency to help them plan their trip



*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

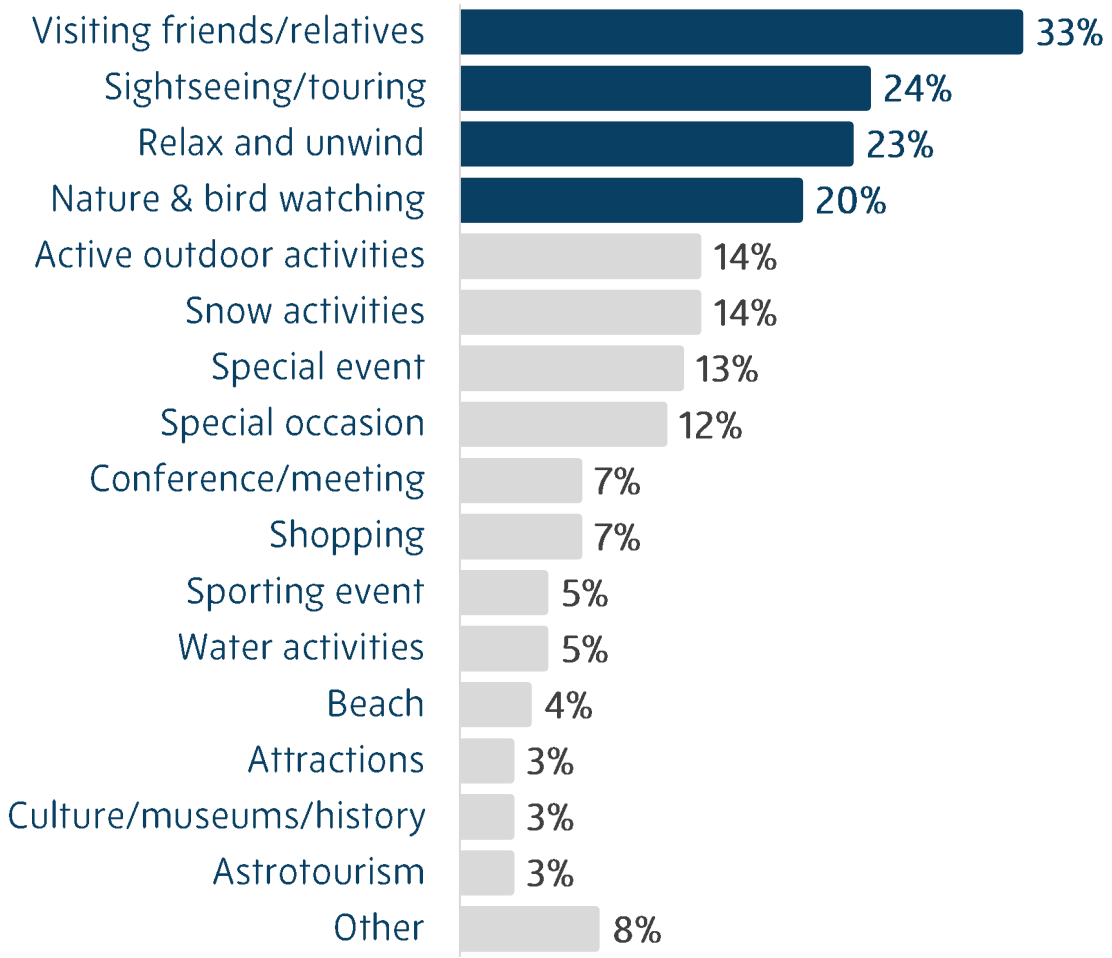
- Over 3 in 10 visitors relied on advice from their friends and family to help them plan their trip in Maine
- Over 1 in 8 visitors used AAA, travel guides/brochures, or travel planning apps to help plan their trip in Maine
- 26% of visitors did not use any other resources to help them plan their trip in Maine



*Multiple responses permitted.

REASONS FOR VISITING*

- 1 in 3 visitors came to Maine to visit friends and relatives
- Nearly 1 in 4 visitors came to Maine for sightseeing/touring (+7% points from 2022) or to relax and unwind
- 1 in 5 visitors came for nature and bird watching

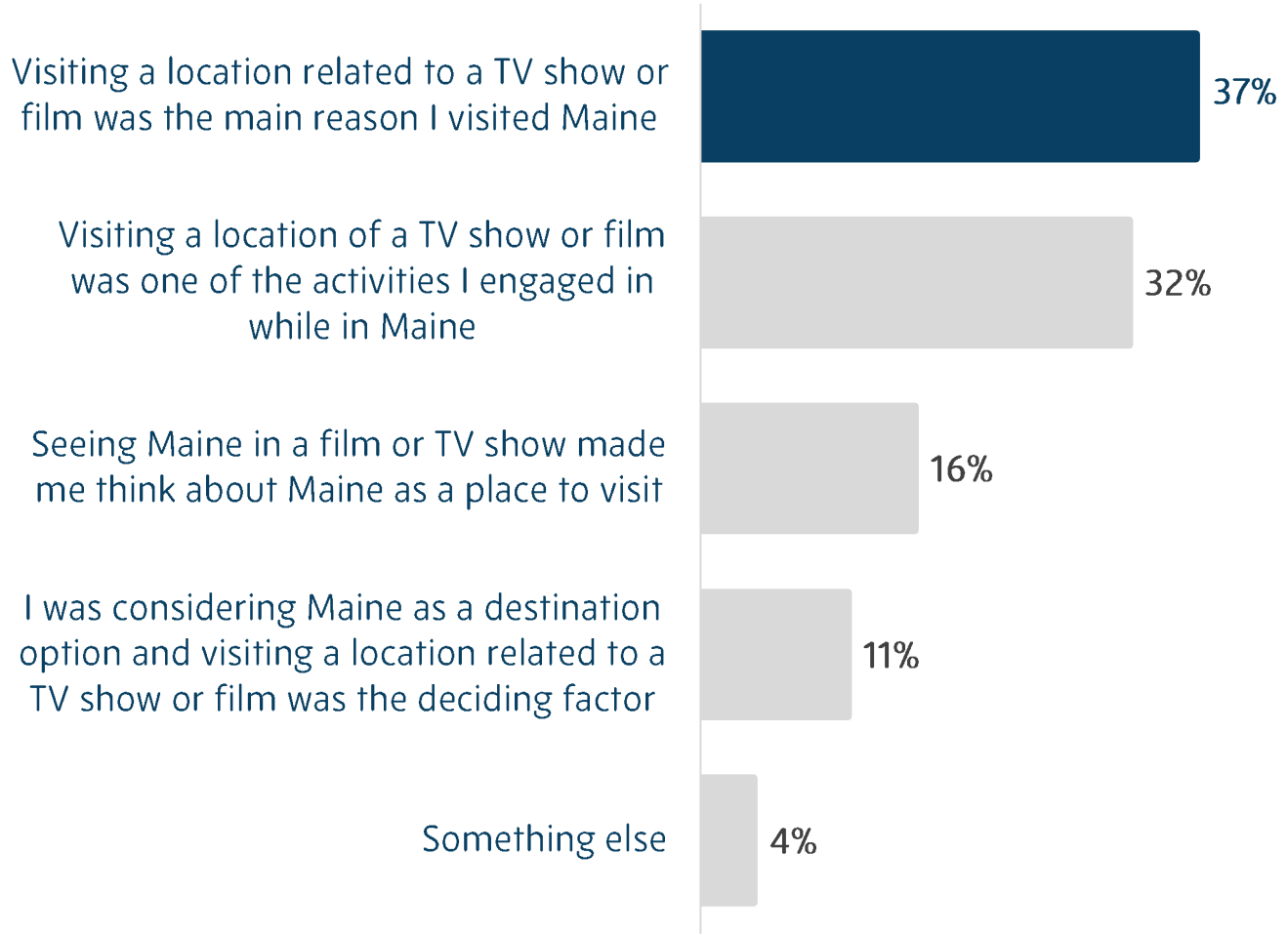


*Multiple responses permitted.

TV SHOWS & FILM*

- **8%** of visitors said a TV show or film inspired their trip to Maine
- **37%** of the visitors who were inspired by a TV show or film said visiting a location related to a TV show or film was the main reason they visited Maine
- **6%** 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

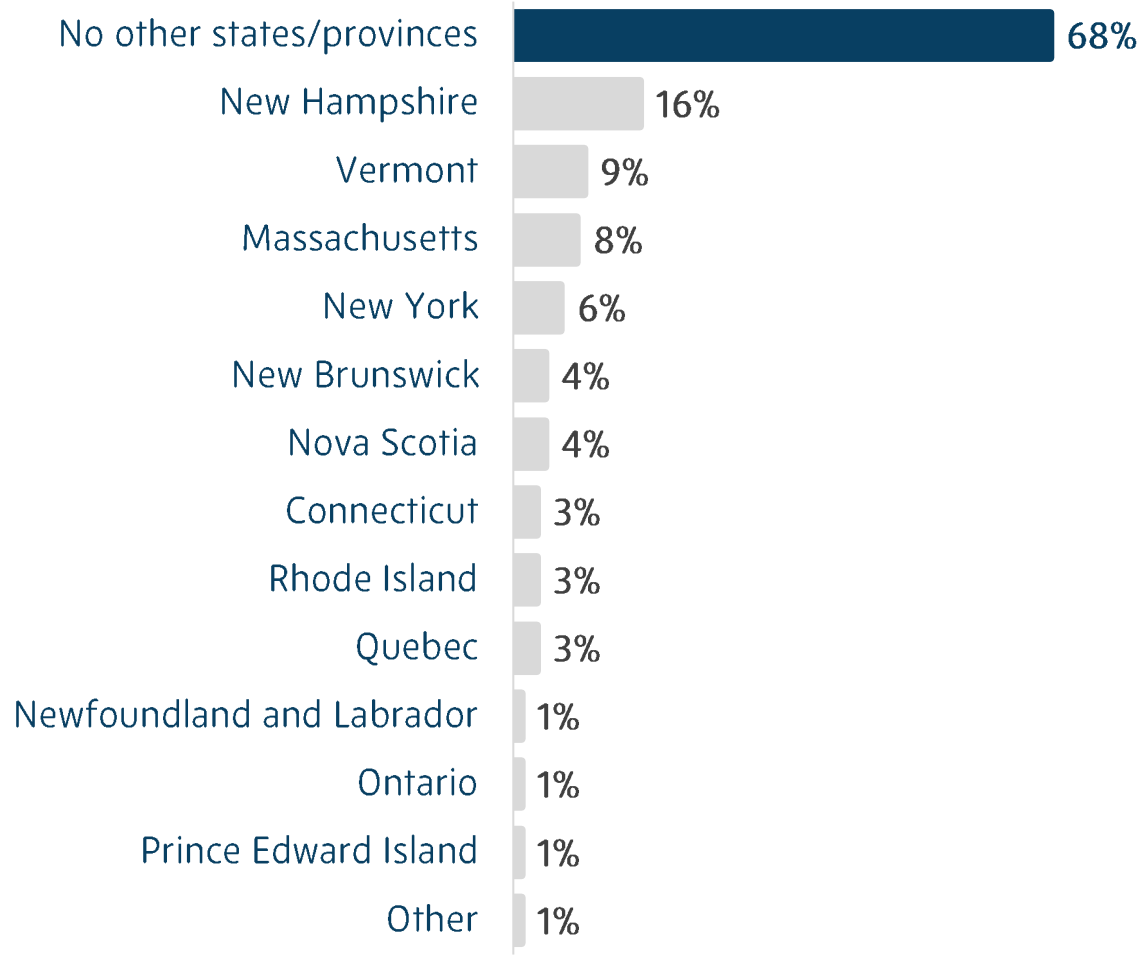
Base: 8% of visitors who were inspired by a TV show or film



*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

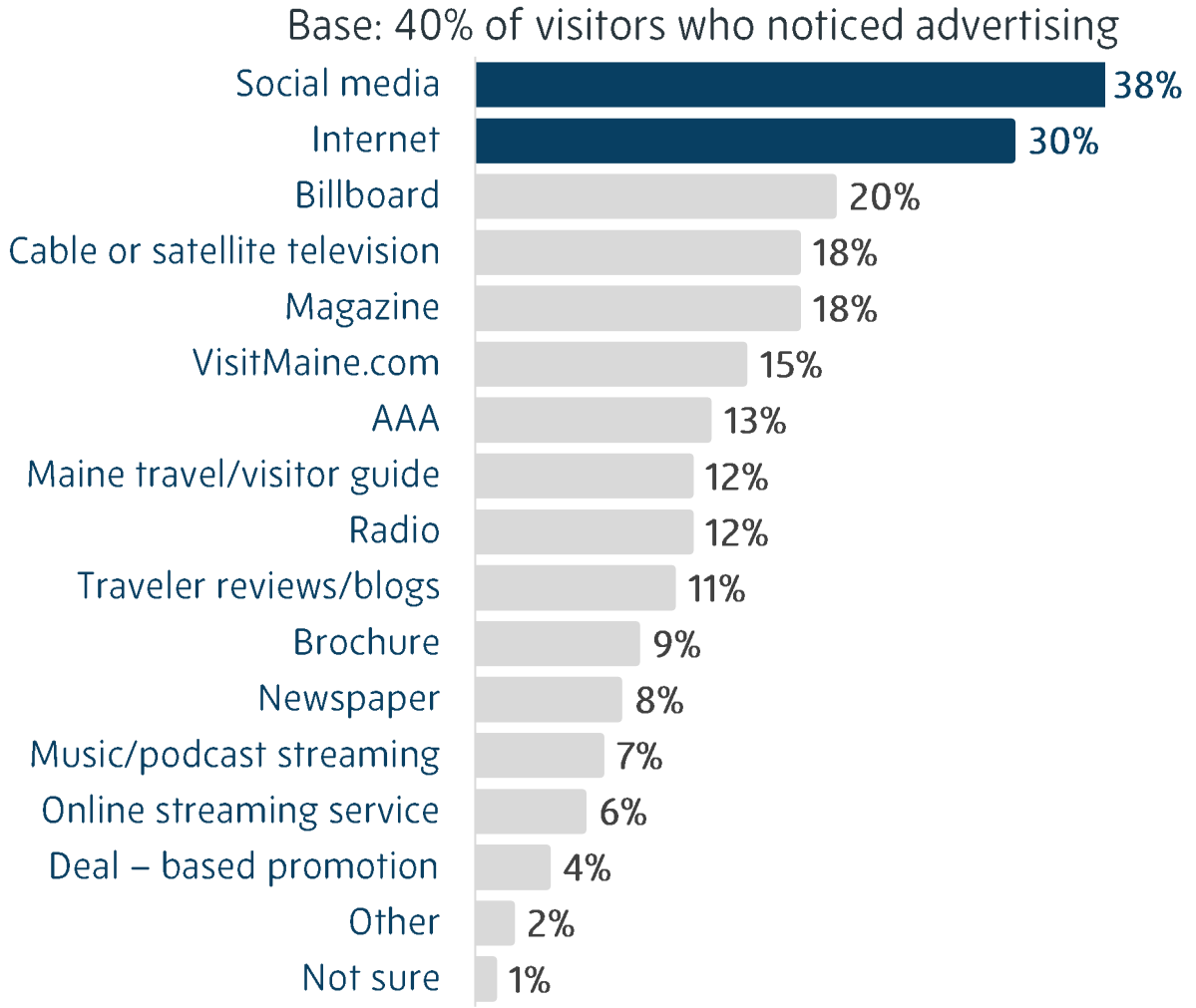
- Nearly 7 in 10 visitors considered visiting ONLY Maine while planning their trips (-2% points from 2022)
- Visitors continued to be more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces



*Multiple responses permitted.

PRE-TRIP RECALL OF ADVERTISING*

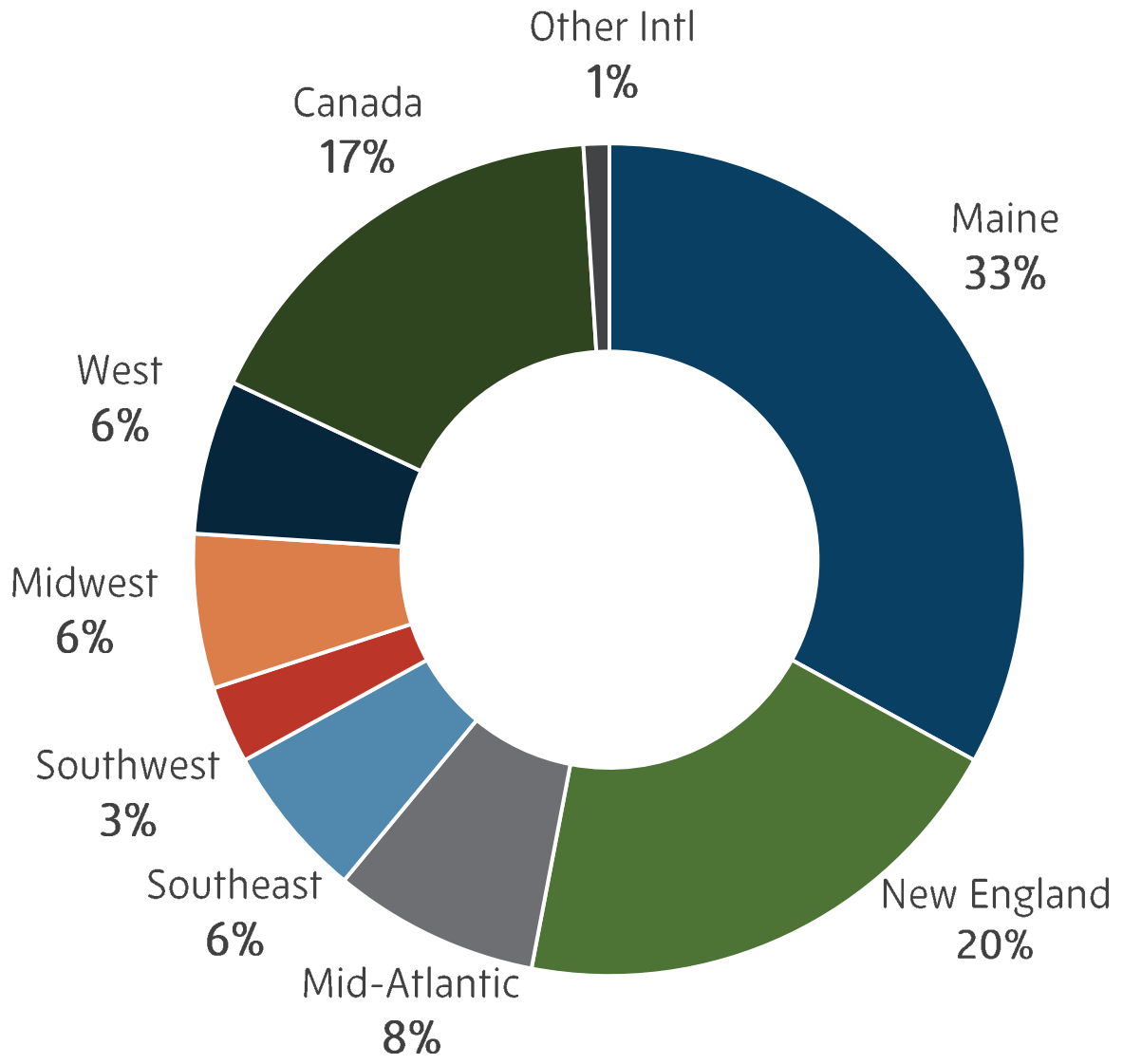
- 2 in 5 visitors recalled advertising or promotions for Maine prior to their trip (-1% point from 2022)
- Visitors who recalled this advertising primarily saw it on social media (-1% point from 2022) or the Internet
- This information influenced 26% of all visitors to visit Maine (-1% point from 2022)



*Multiple responses permitted.

VISITOR JOURNEY: TRAVELER PROFILE

VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- 80% of visitors traveled to/within Maine from 12 U.S. states and Canadian provinces
- 1 in 3 visitors were residents of Maine traveling throughout the state

State/Province	Percent
Maine	33%
New Brunswick	11%
New Hampshire	10%
Massachusetts	6%
Quebec	4%
Florida	3%
New York	3%
California	2%
Connecticut	2%
Pennsylvania	2%
Texas	2%
Nova Scotia	2%

TOP ORIGIN MARKETS

- **42%** of visitors traveled from **14** U.S. and Canadian markets
- **6%** of visitors traveled from Rochester - Portsmouth, NH

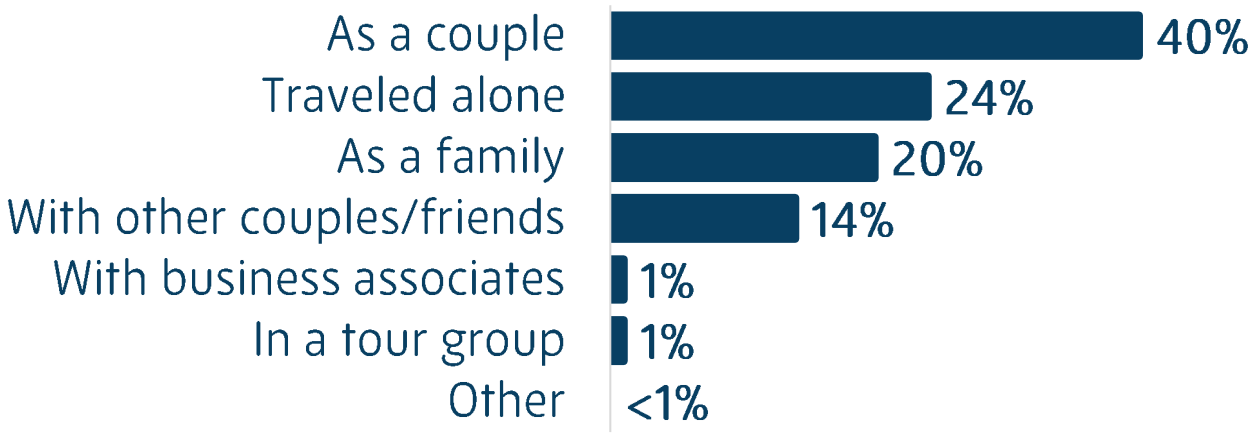
Market	Percent
Rochester - Portsmouth, NH	6%
Bangor	4%
Portland	4%
New York City[1]	3%
Boston	3%
Kittery	3%
Presque Isle	3%
Fredericton, CAN	3%
Saint John, CAN	3%
Auburn – Lewiston	2%
Ft. Kent – St. Agatha	2%
Moncton, CAN	2%
Halifax, CAN	2%
Montreal, CAN	2%

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

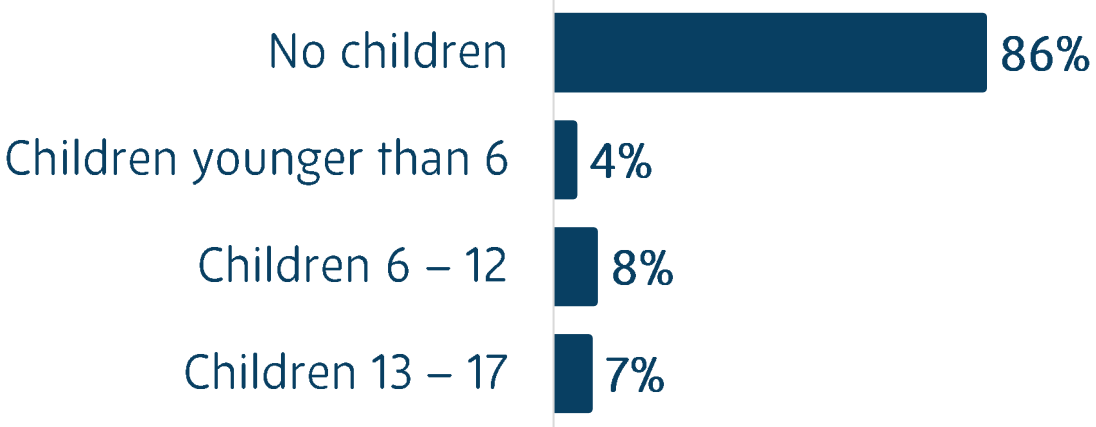
TRAVEL PARTIES

- Typical visitors traveled to Maine in parties of 2.3 people
- 2 in 5 visitors traveled as a couple
- Nearly 1 in 4 traveled alone
- 14% of visitors traveled with one or more children in their travel party

Travel Party Composition



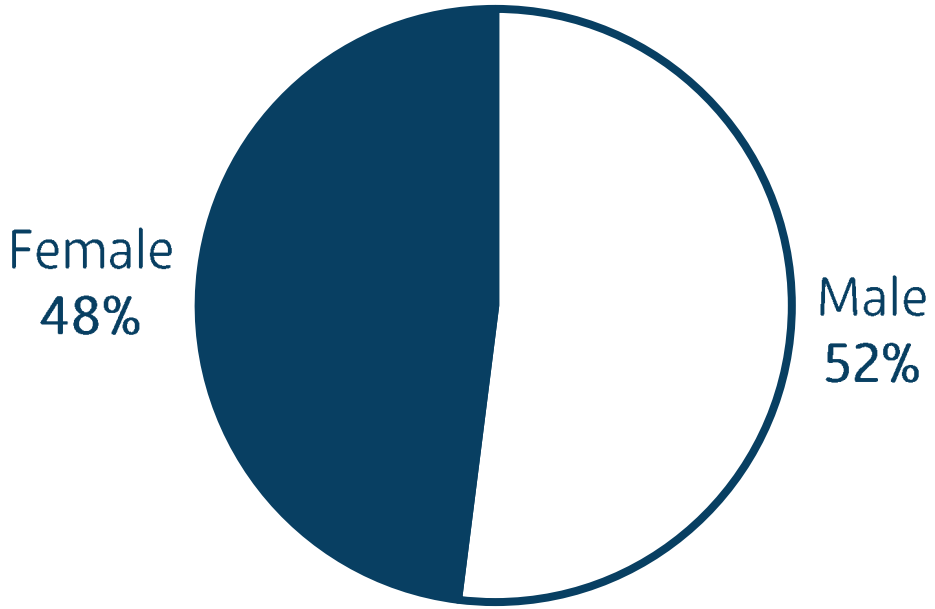
Children in Travel Party*



*Multiple responses permitted.

GENDER

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



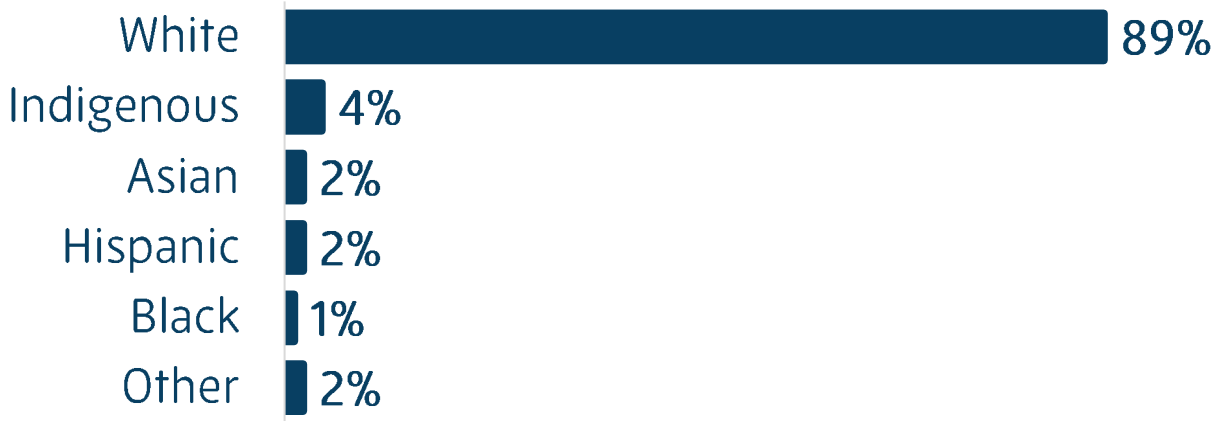
*Gender of member of the travel party who was interviewed.
May be influenced by visitors' willingness to complete a survey.

AGE

» The average age of visitors to Maine is 49 years old

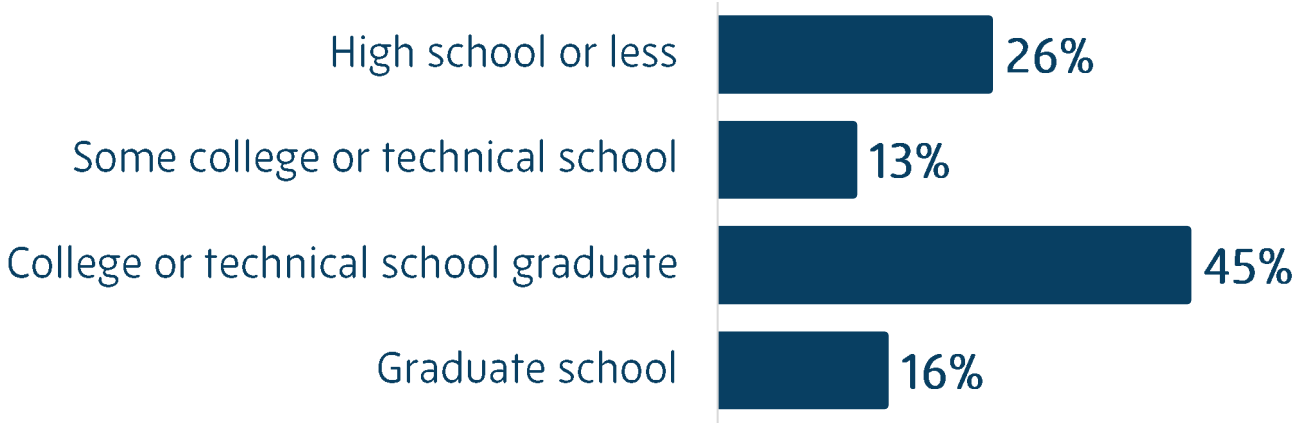
RACE & ETHNICITY

» Nearly 9 in 10 visitors to Maine were white



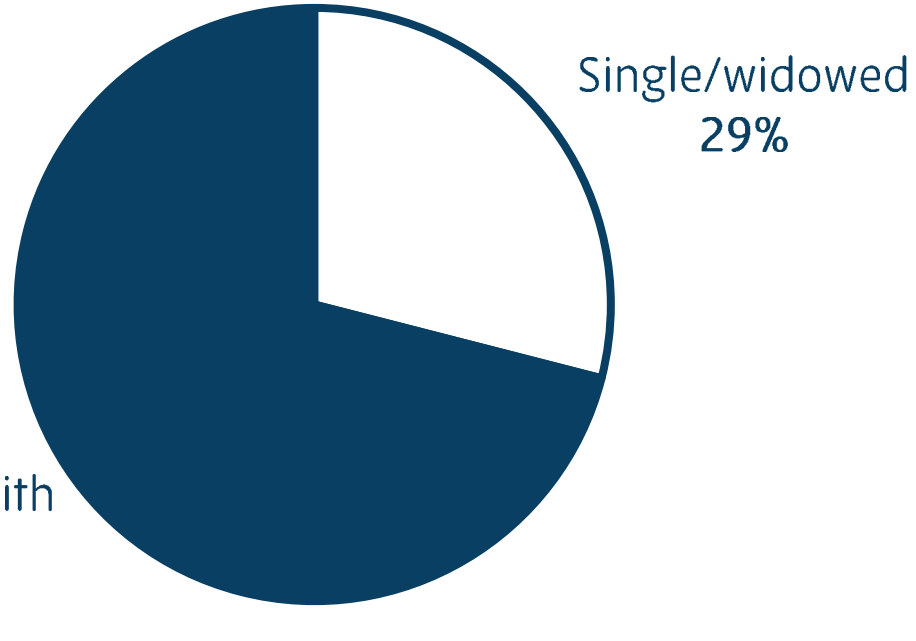
EDUCATIONAL ATTAINMENT

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



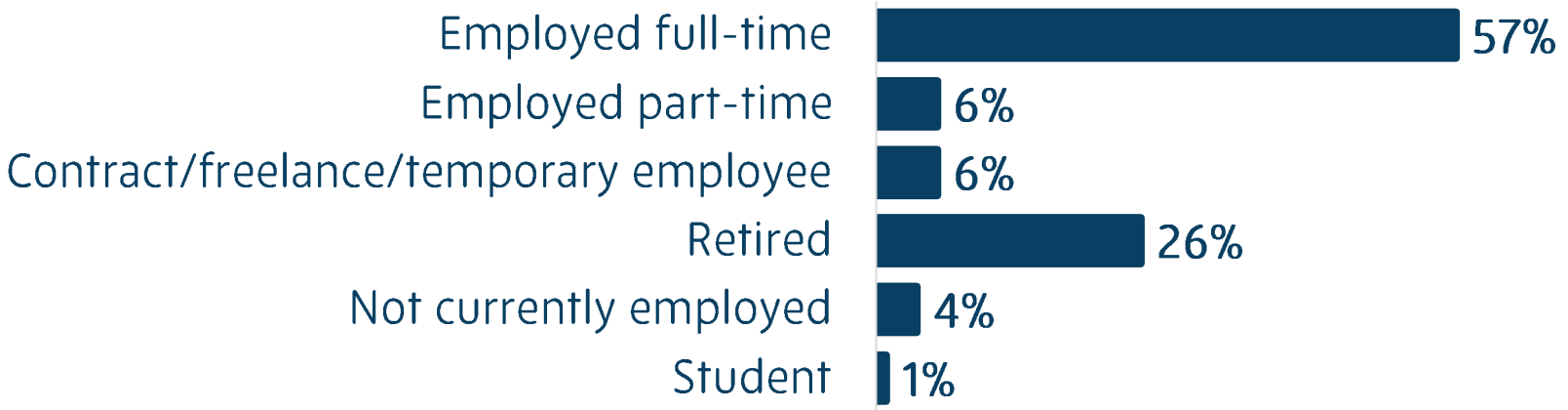
MARITAL STATUS

» Over 7 in 10 visitors to Maine were married or living with their partner



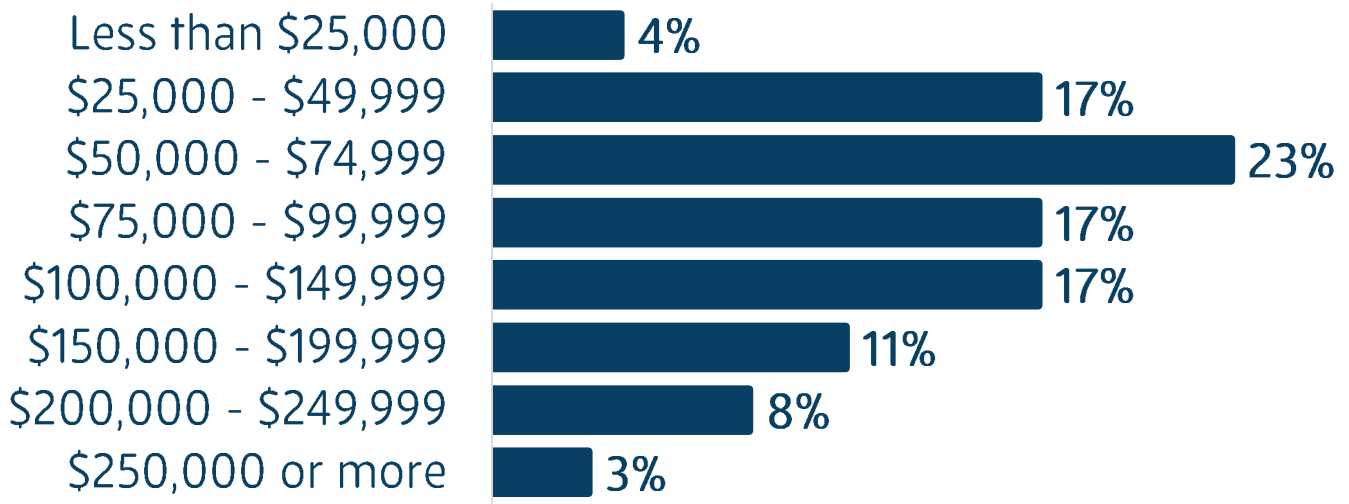
EMPLOYMENT STATUS

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



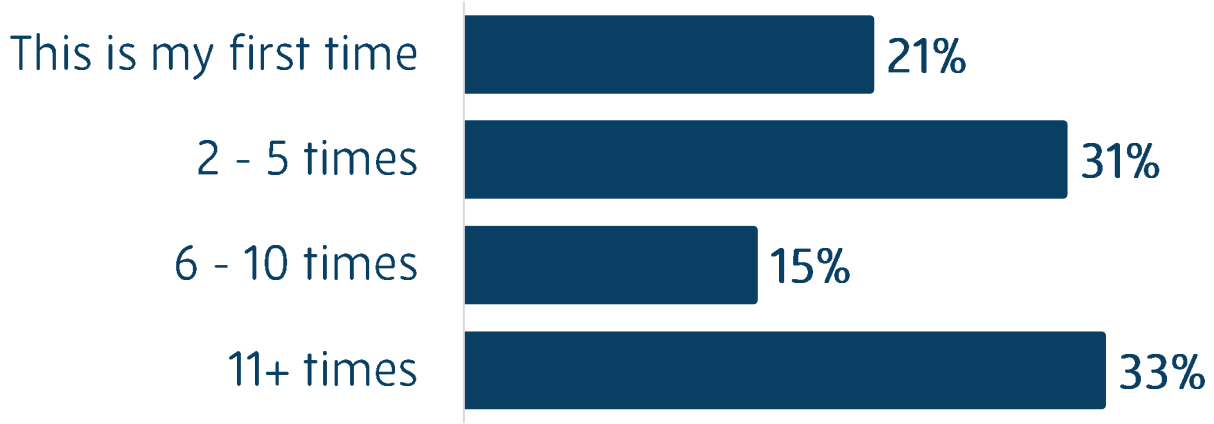
HOUSEHOLD INCOME

- The average household income of visitors to Maine is $83,800 per year
- 22% of visitors to Maine earned more than $150,000 per year



NEW & RETURNING VISITORS

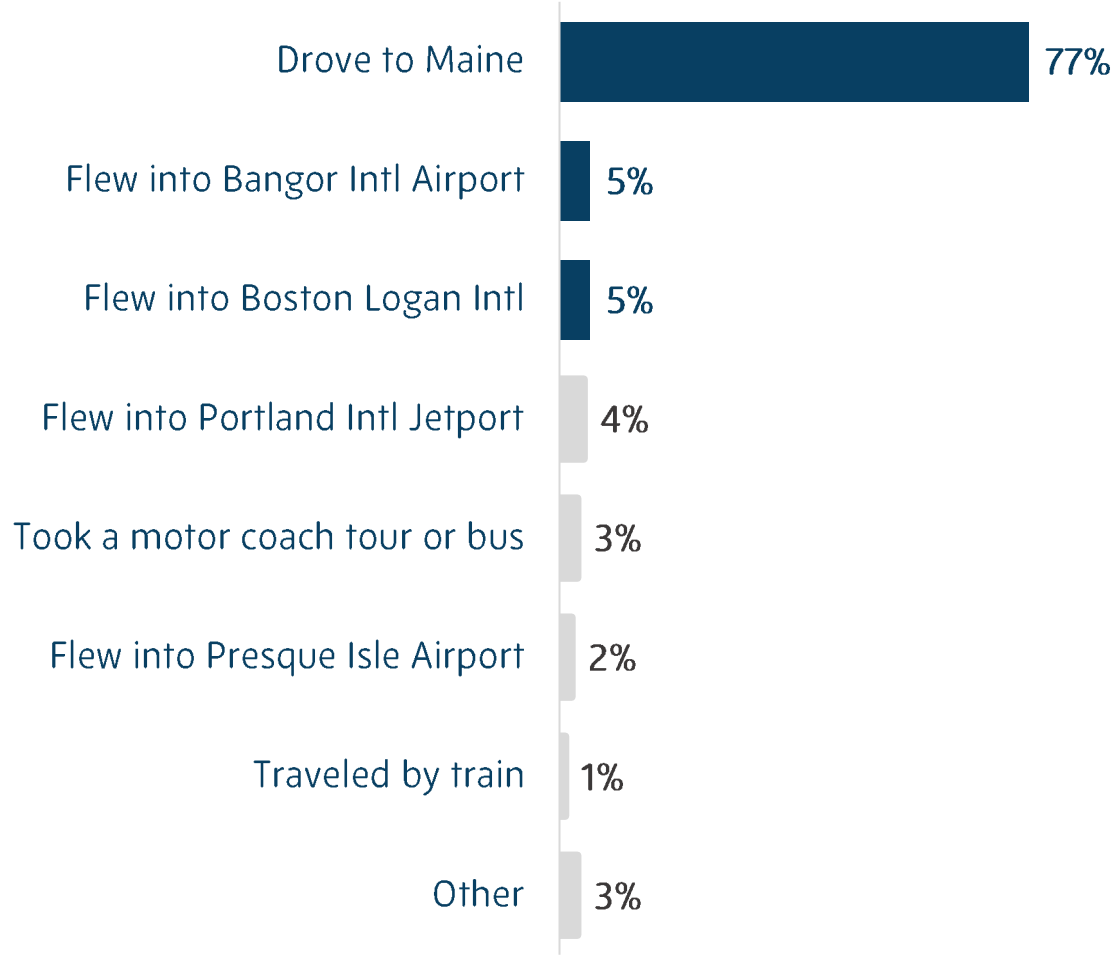
- Like last year, 21% of visitors were traveling in Maine for the first time
- Aroostook County has high repeat and loyal visitors, as 33% had previously traveled in Maine more than 10 times



VISITOR JOURNEY: TRIP EXPERIENCE

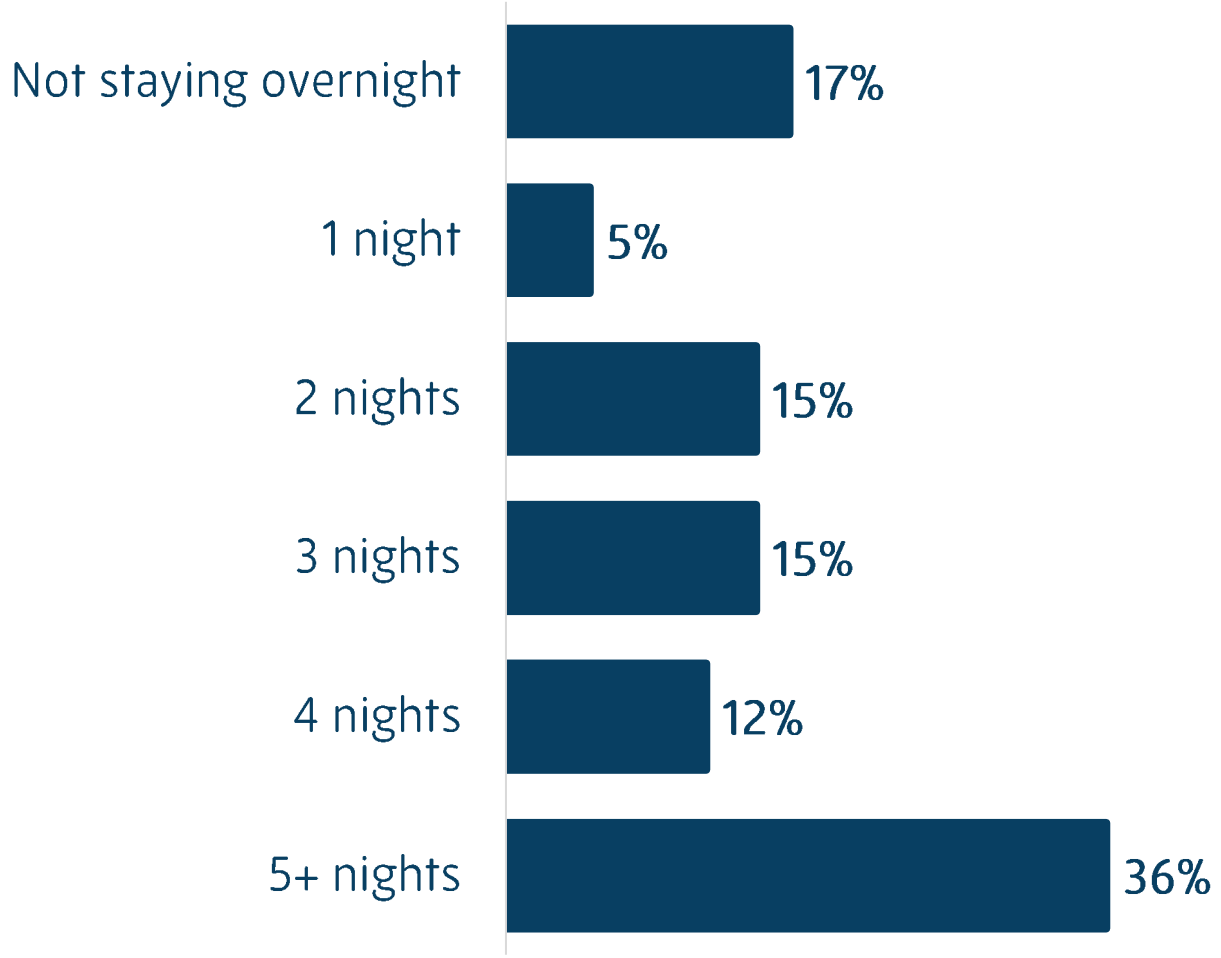
MODES OF TRANSPORTATION

- Maine is a drive-market for most visitors, with 77% choosing to travel by car over plane, motor coach/bus, or train
- Most visitors who flew to Maine arrived at Bangor International Airport or Boston Logan International Airport



NIGHTS STAYED

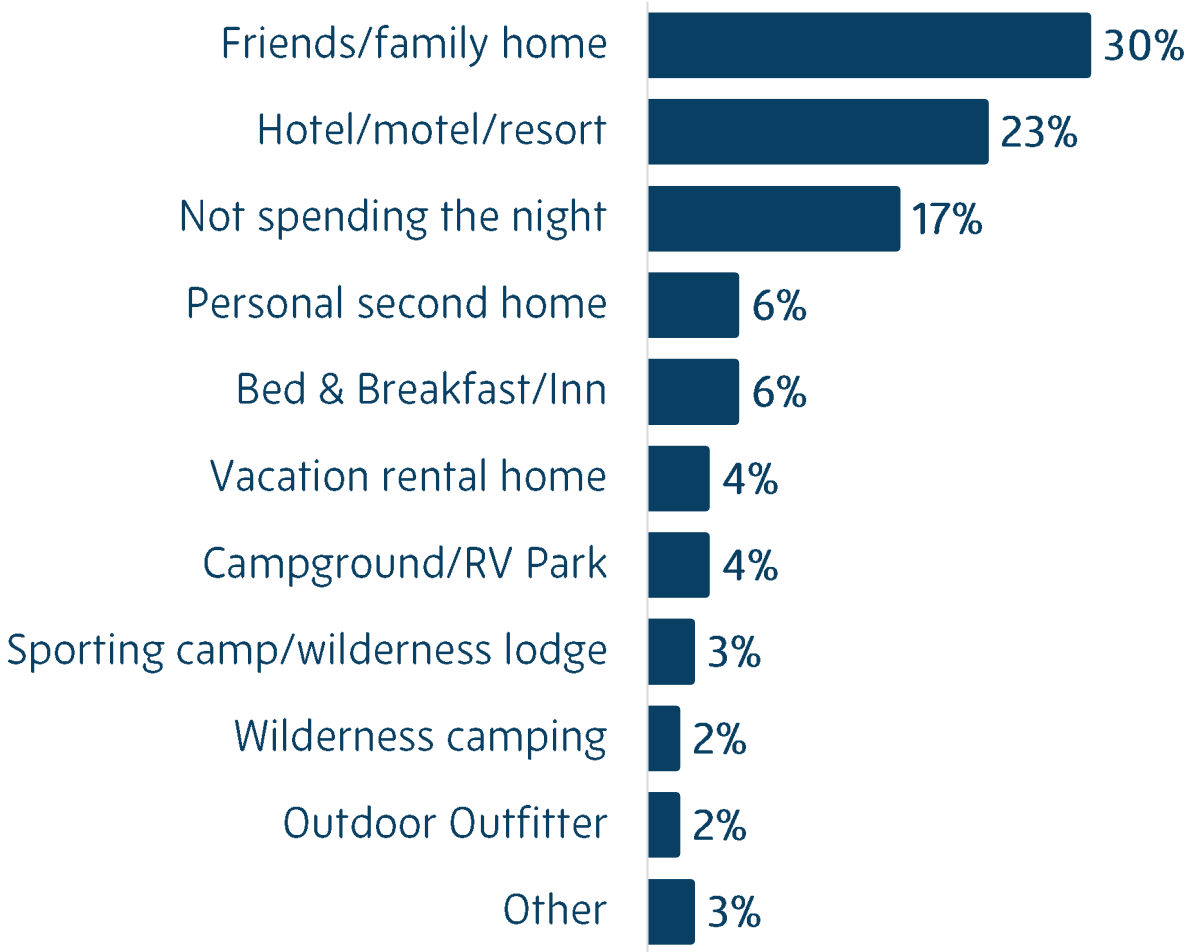
- 83% of visitors stayed one or more nights in Maine on their trip
- Typical visitors stayed 3.7* nights in Maine on their trips (-0.3 from 2022)
- Typical visitors staying overnight in paid accommodations stayed 4.0 nights in Maine on their trips



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

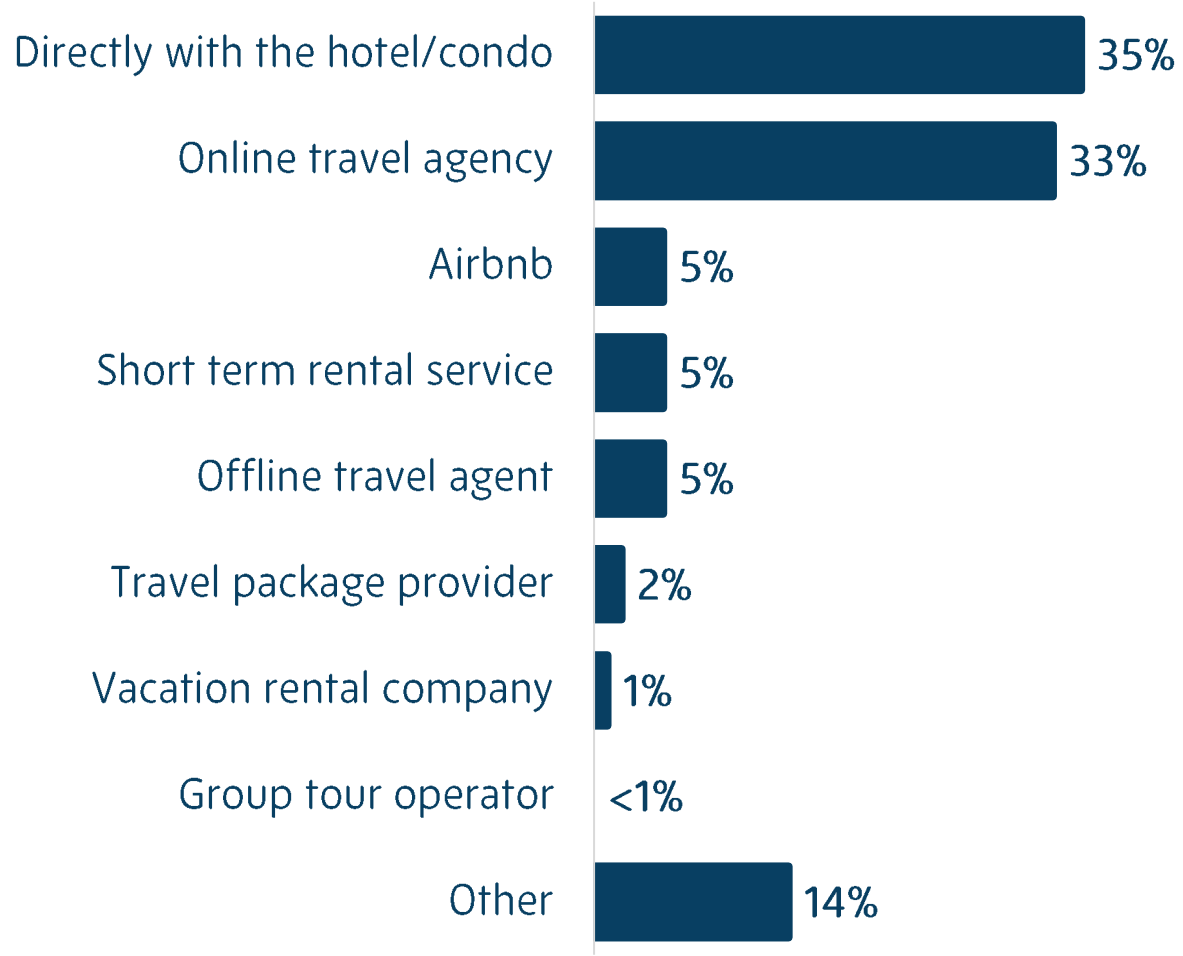
ACCOMMODATIONS

- 3 in 10 visitors stayed overnight at a friend's/family's home
- Nearly 1 in 4 stayed in a hotel, motel, or resort (+4% points from 2022)



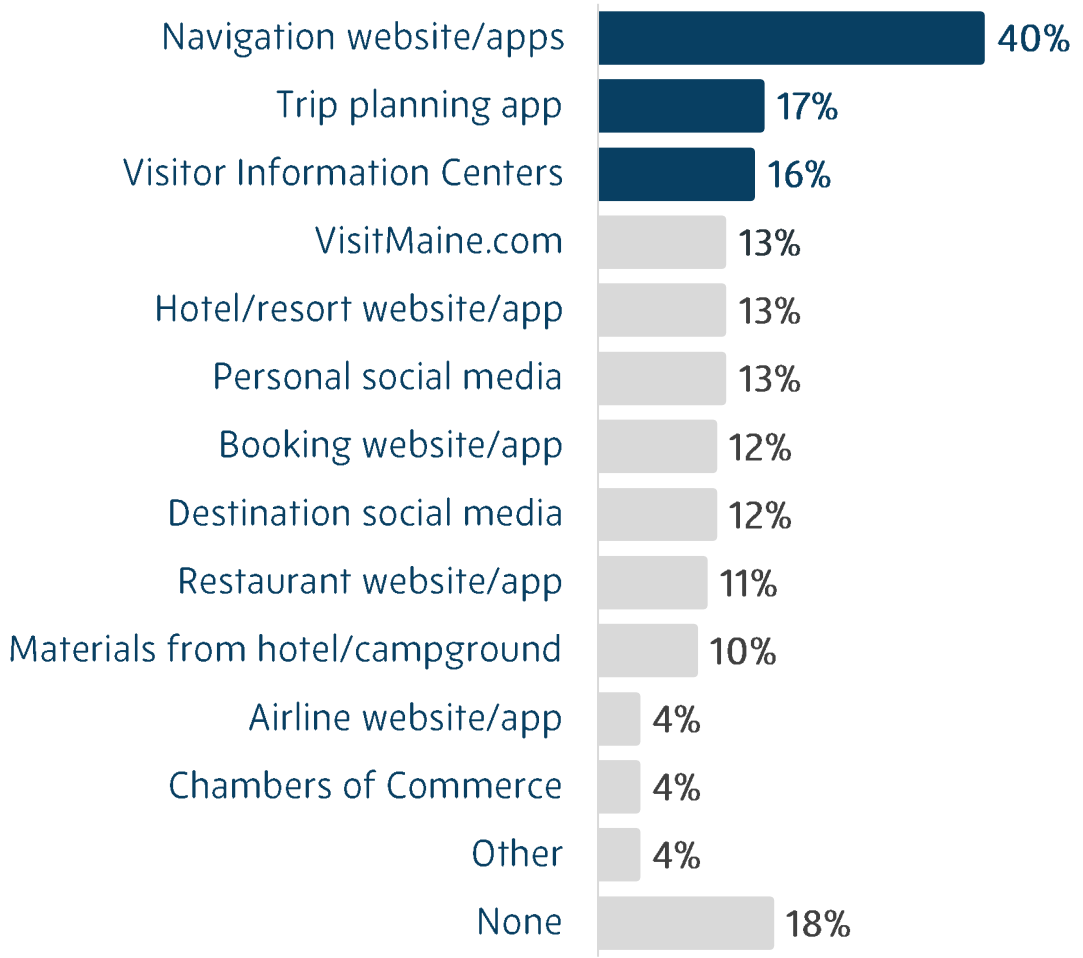
BOOKING METHODS

» About 1 in 3 visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo or through and online travel agency



IN-MARKET VISITOR RESOURCES*

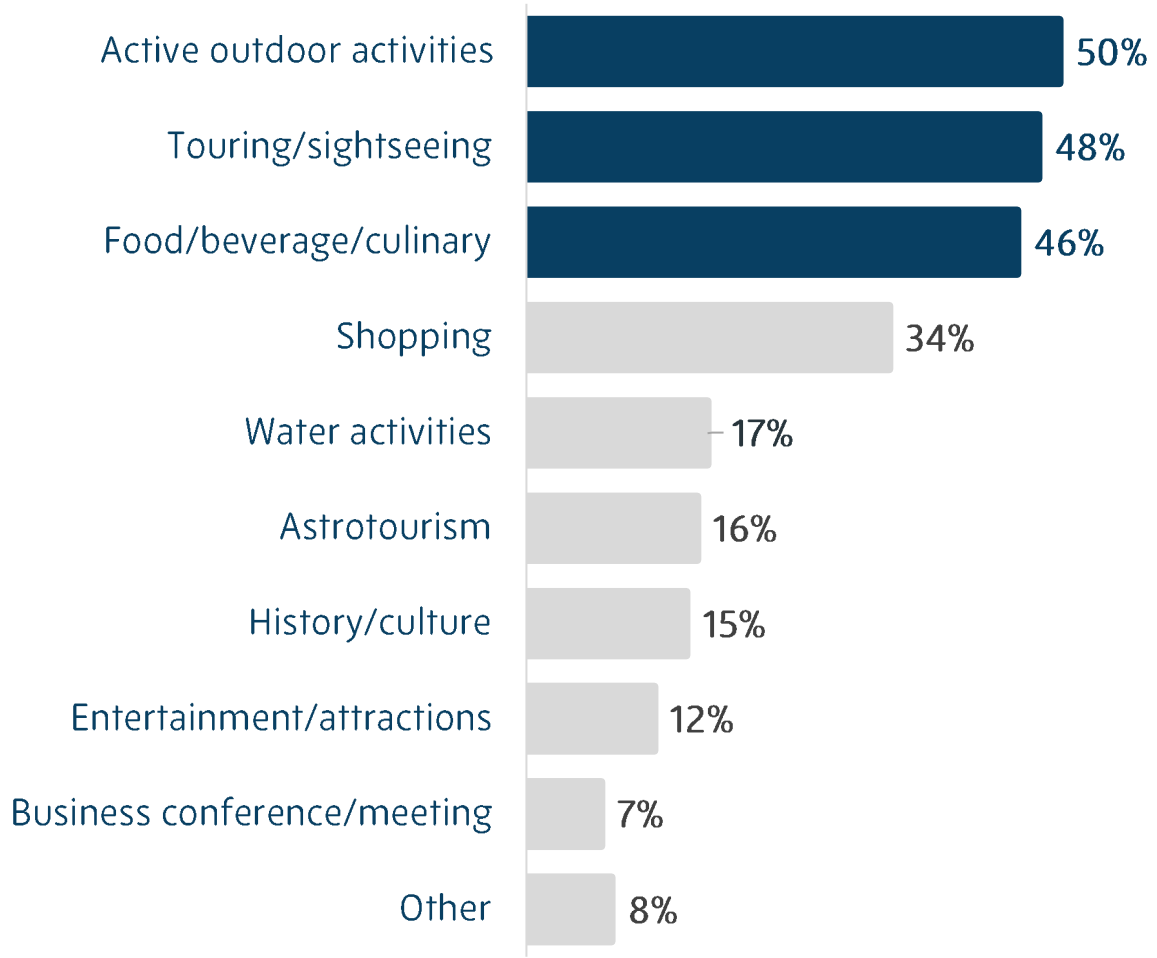
- Visitors were most likely to rely on navigation websites/apps (Google or Apple Maps, etc.) to plan activities in–market
- 17% of visitors used a trip planning app
- 18% of visitors did not use any resources to plan activities while they were in-market



*Multiple responses permitted.

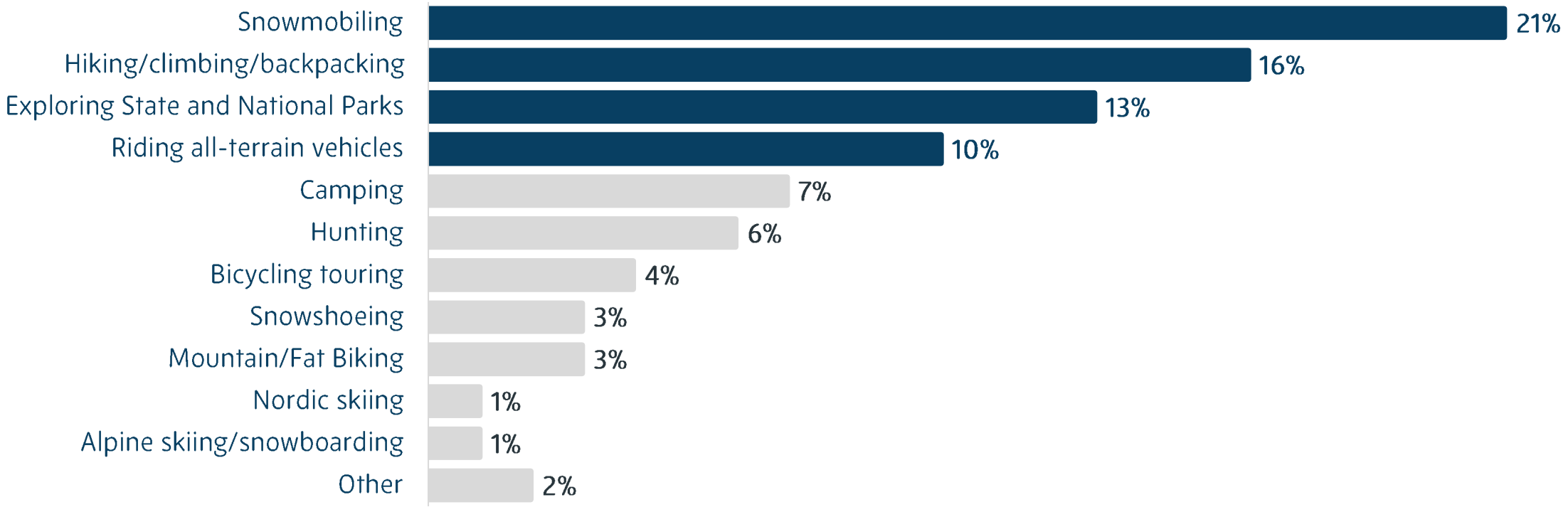
VISITOR ACTIVITIES*

- **Half** of visitors participated in active outdoor activities during their trip to Maine
- **48%** of visitors engaged in touring and sightseeing
- **Nearly half** of visitors participated in culinary activities during their trip



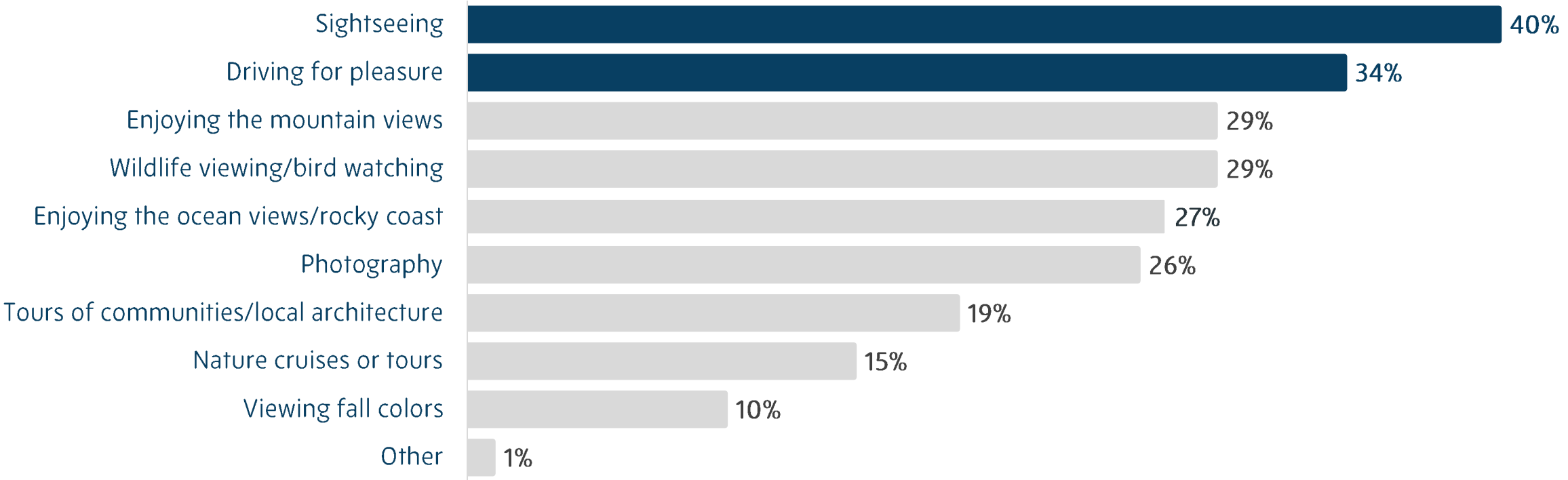
*Multiple responses permitted.

ACTIVE OUTDOOR ACTIVITIES*



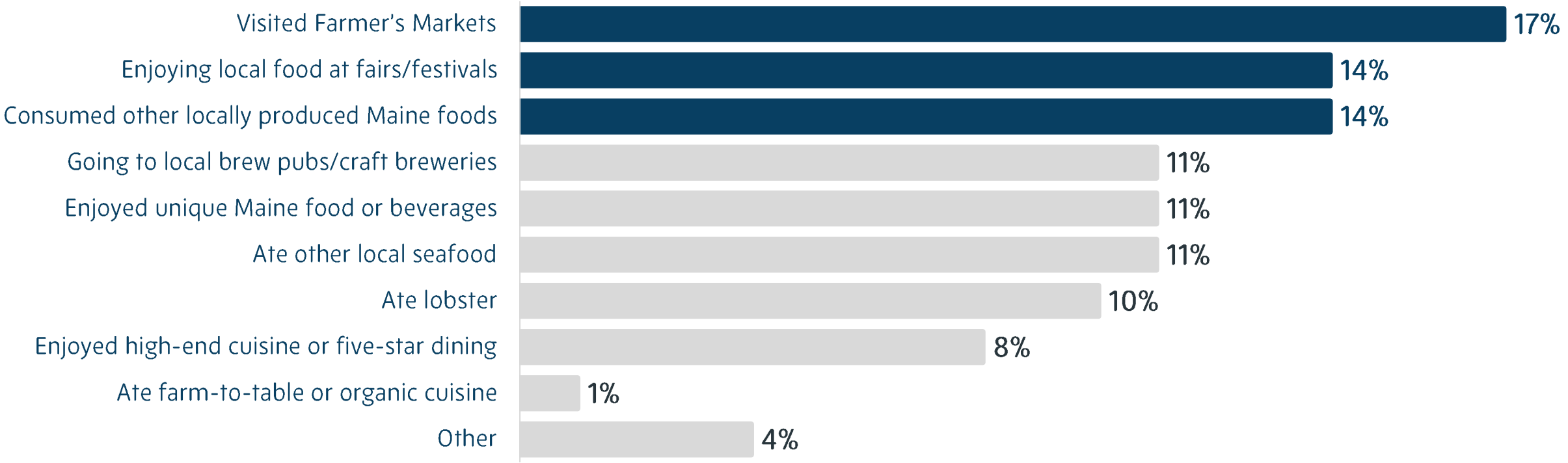
*Multiple responses permitted.

TOURING & SIGHTSEEING ACTIVITIES*



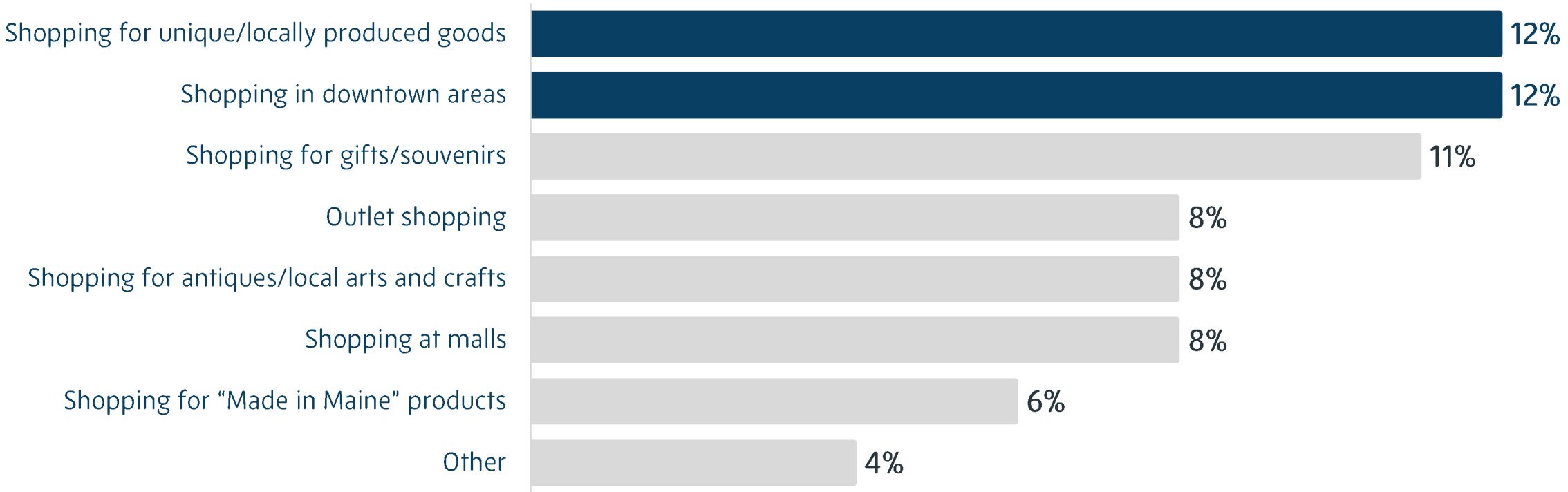
*Multiple responses permitted.

FOOD & BEVERAGE ACTIVITIES*



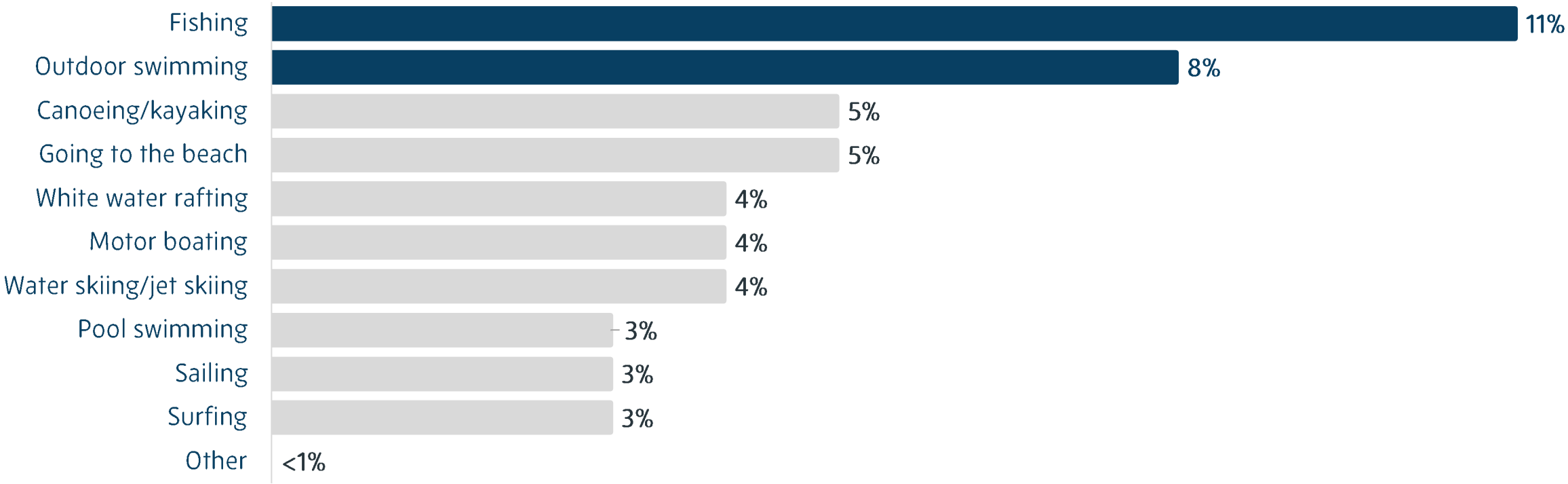
*Multiple responses permitted.

SHOPPING ACTIVITIES*



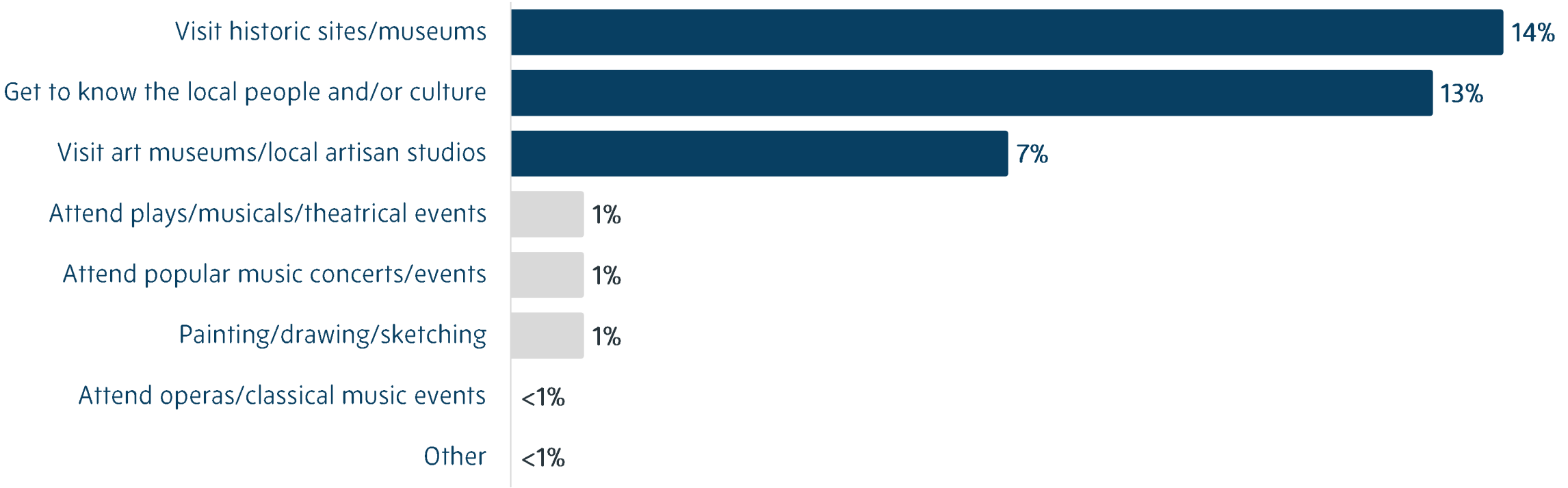
*Multiple responses permitted.

WATER ACTIVITIES*



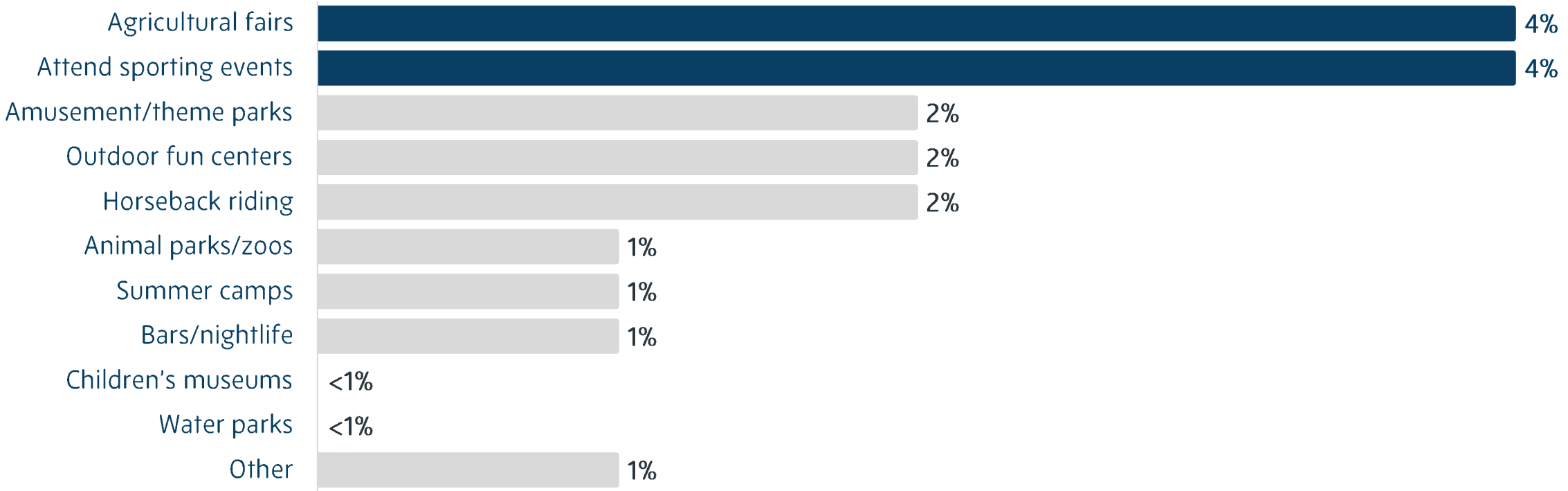
*Multiple responses permitted.

HISTORICAL & CULTURAL ACTIVITIES*



*Multiple responses permitted.

ENTERTAINMENT ACTIVITIES*



*Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

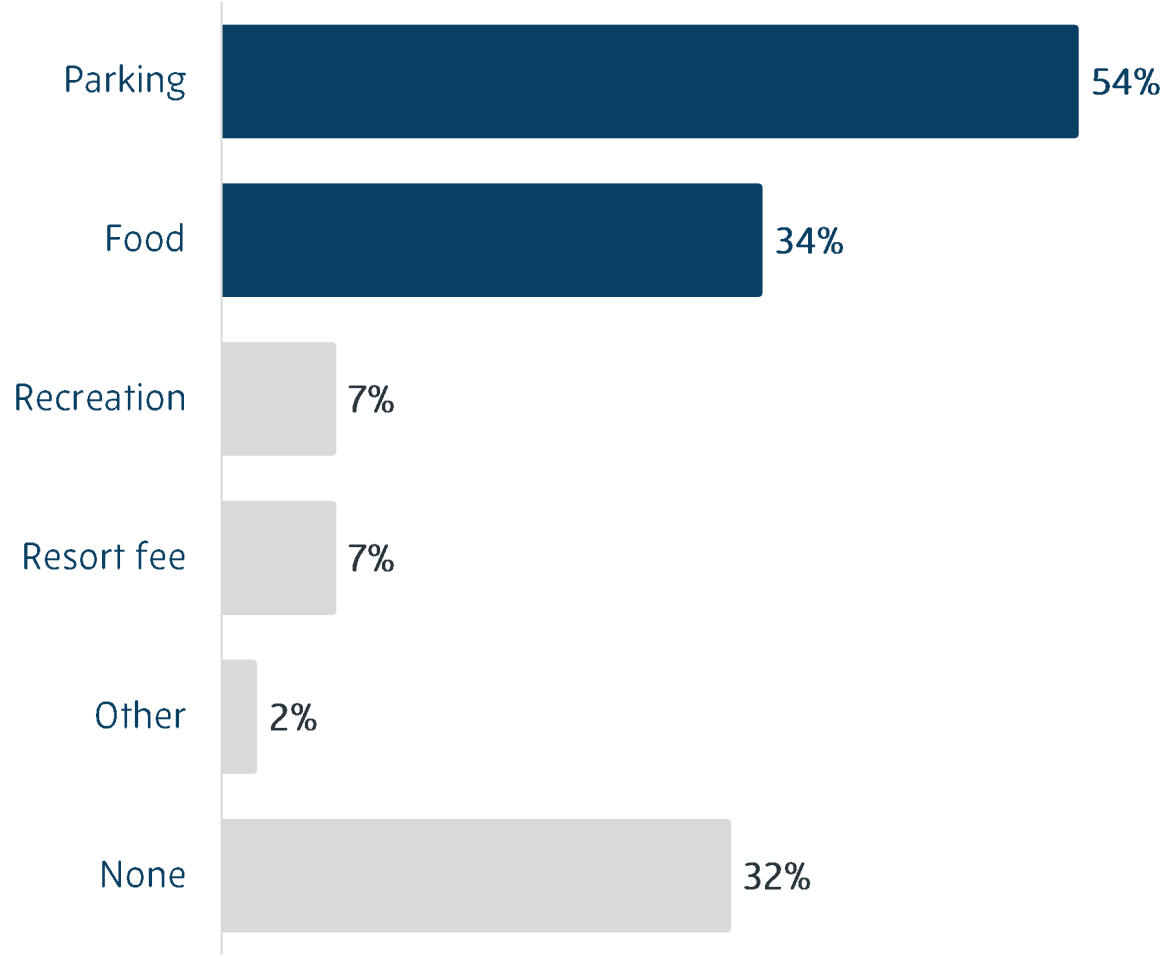
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	$169	$0	$0
Transportation	$74	$69	$37
Groceries	$40	$43	$24
Restaurants	$124	$94	$33
Shopping	$80	$91	$99
Activities & Attractions	$73	$46	$9
Other	$25	$27	$5
Daily Spending	**$585**	**$370**	**$207**

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	$676	$0	$0
Transportation	$296	$311	$37
Groceries	$160	$194	$24
Restaurants	$496	$423	$33
Shopping	$320	$410	$99
Activities & Attractions	$292	$207	$9
Other	$100	$122	$5
Total Spending	**$2,340**	**$1,665**	**$207**

LODGING AMENITIES*

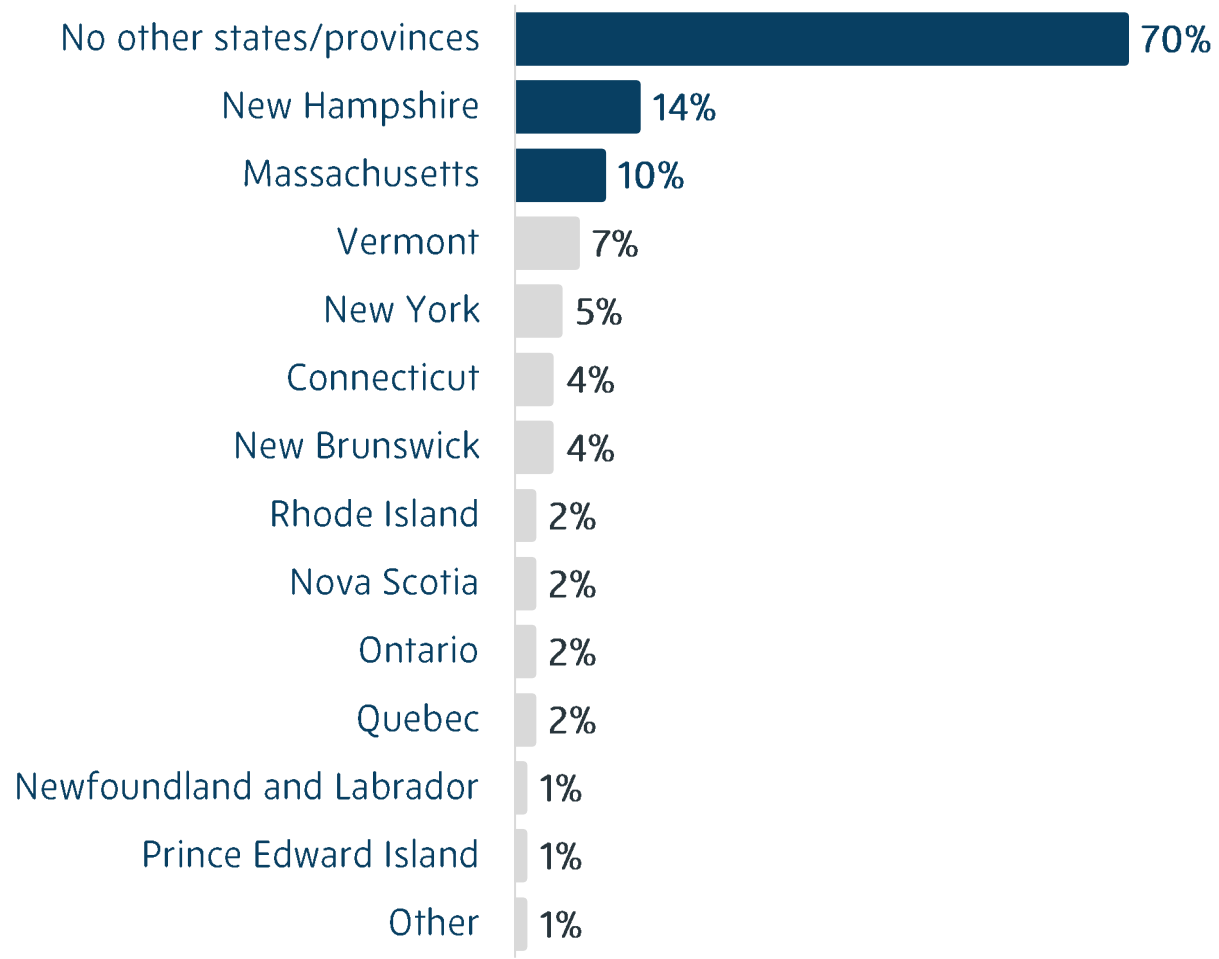
- An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for over 2 in 3 visitors
- Price for accommodations included parking for over half of visitors
- Food was included in accommodations' pricing for over 1 in 3 visitors



*Multiple responses permitted.

OTHER STATES & PROVINCES VISITED*

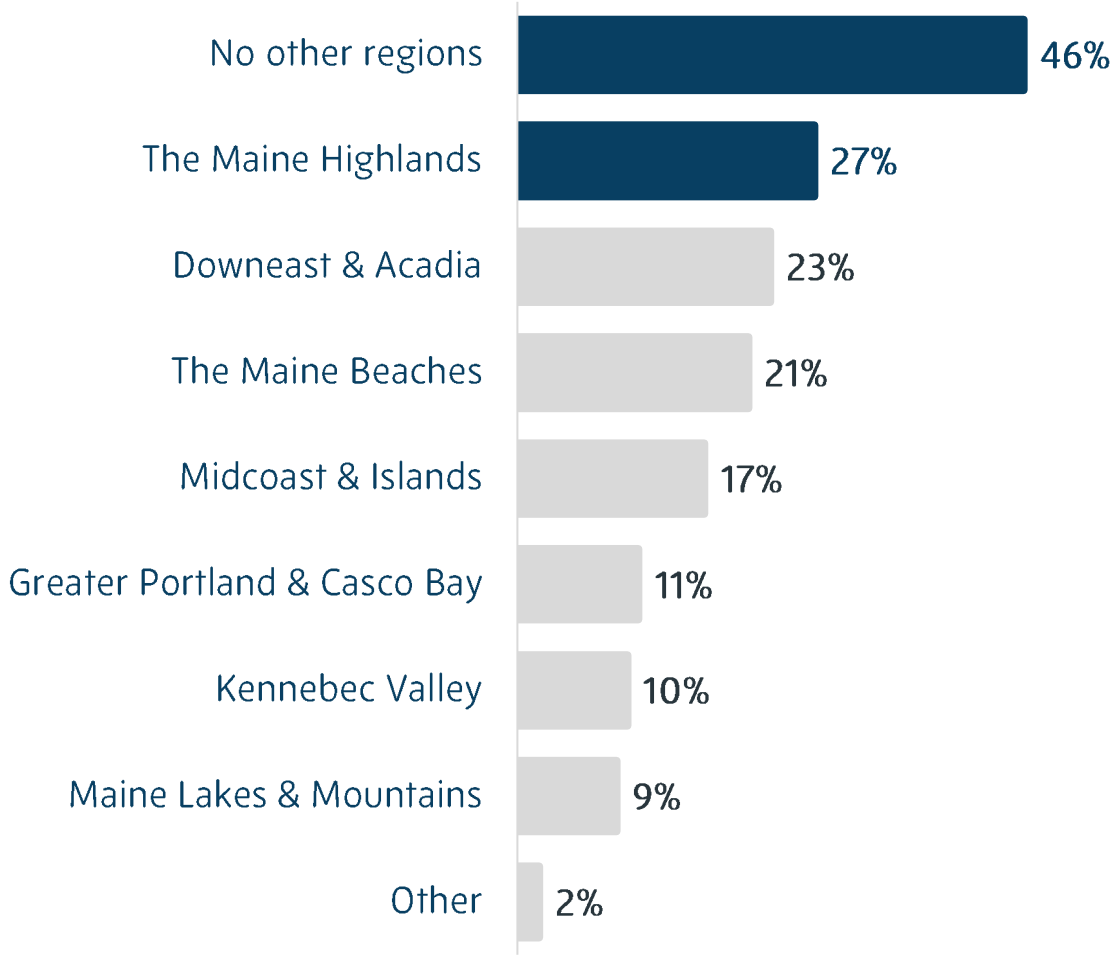
- 7 in 10 visitors did not visit any other U.S. state or Canadian province during their trip
- Visitors continued to be more likely to visit U.S. states near Maine than they were to visit a Canadian province during their trip



*Multiple responses permitted.

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 (-3% points from 2022)
- Over **1 in 4** visitors visited the Maine Highlands in addition to their primary destination within Maine



*Multiple responses permitted.

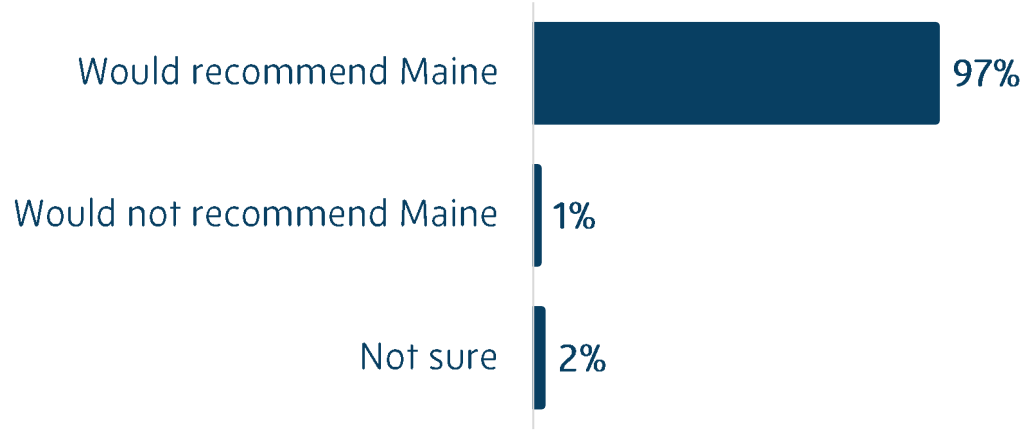
VISITOR JOURNEY: POST-TRIP EVALUATION

RECOMMENDING MAINE & ITS REGIONS

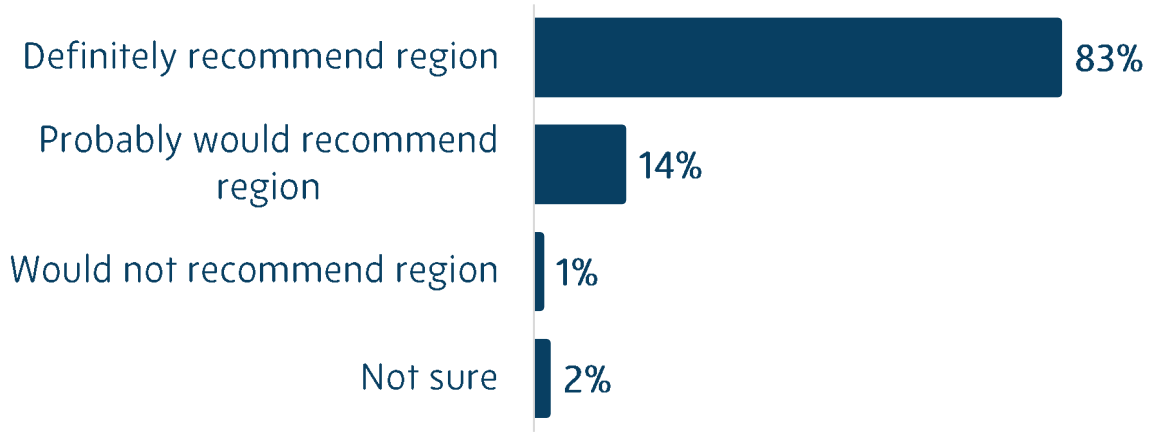
- Like last year, 97% of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation

- 97% of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – 83% would definitely recommend (+6% points from 2022)

Likelihood of Recommending Maine



Likelihood of Recommending Region Visited



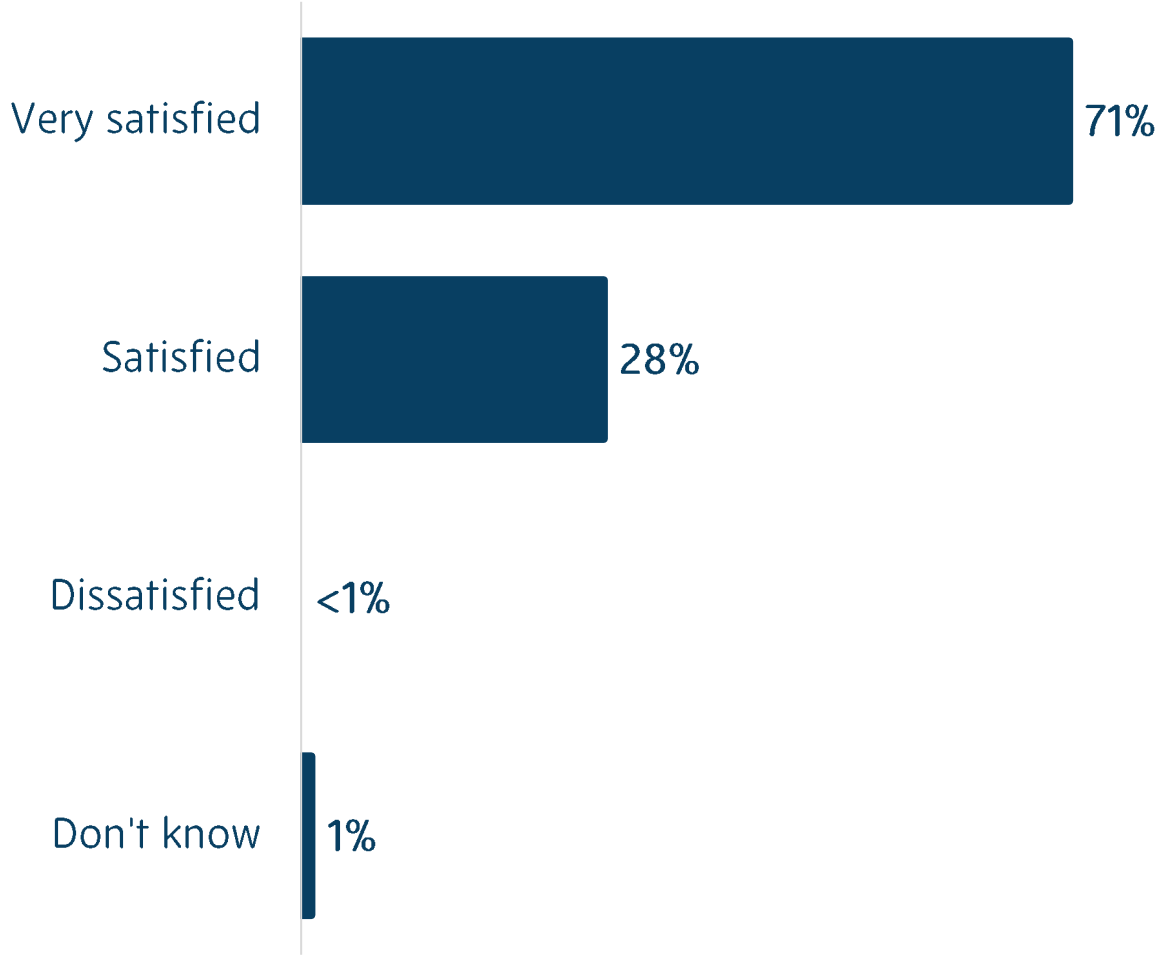
LIKELIHOOD OF RETURNING TO MAINE

» 96% of visitors will return to Maine for a future visit or vacation

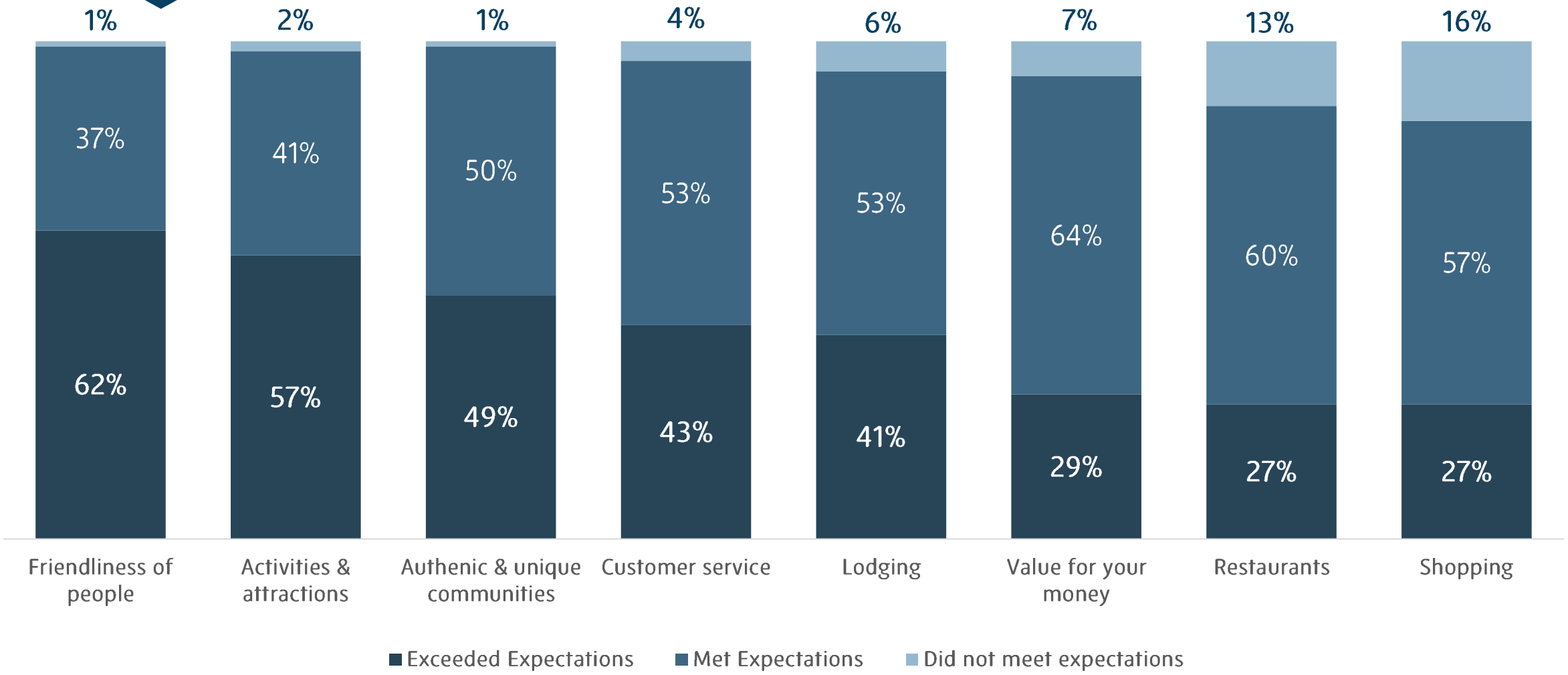
*4% of all visitors are not sure or will probably not return to Maine for the following reasons:
1. Prefer a variety of destinations 2. Airline service is too limited or expensive 3. Once is enough to see and do everything 4. Lack of nightlife 5. Lack of activities and attractions.

SATISFACTION

- 99% of visitors were satisfied with their trip to Maine
- Over 7 in 10 visitors were very satisfied with their trip to Maine

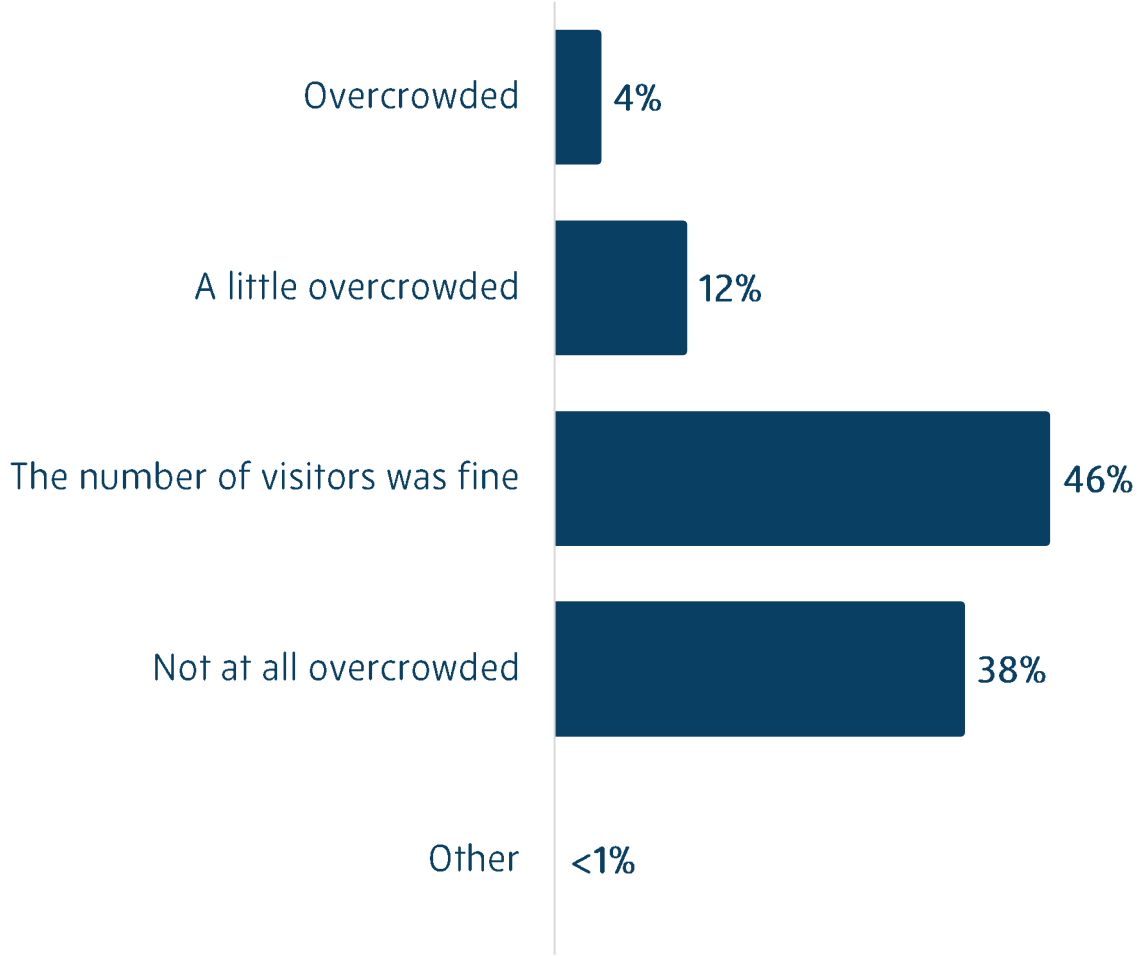


TRIP RATINGS



OVERCROWDING

- Nearly **half** of visitors thought the number of visitors during their trip to Maine was fine (+12% points from 2022)
- **4%** of visitors thought it was overcrowded



ANNUAL COMPARISONS

VISITOR JOURNEY : PRE-VISIT

TRIP PLANNING CYCLE

Trip Planning Cycle	2022	2023
A week or less	19%	19%
2 - 3 weeks	25%	19%
1 - 2 months	24%	24%
3 - 4 months	15%	21%
5 - 6 months	10%	9%
7 months - 1 year	5%	6%
More than 1 year	2%	2%
Days in Planning Cycle	**38**	**45**

Booking Window	2022	2023
A week or less	25%	24%
2 - 3 weeks	28%	24%
1 - 2 months	22%	22%
3 - 4 months	13%	18%
5 - 6 months	7%	8%
7 months - 1 year	3%	3%
More than 1 year	2%	1%
Days in Booking Window	**20**	**33**

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2022	2023
Online search engines	23%	26%
Online travel agency	12%	18%
VisitMaine.com	9%	14%
VisitAroostook.com	8%	14%
Facebook	14%	13%
Hotel websites	8%	11%
Traveler reviews/blogs/stories	7%	9%
TripAdvisor	8%	8%
Visit Maine social media	9%	8%
YouTube	8%	7%
DowneastAcadia.com	2%	7%
TheMaineBeaches.com	2%	7%
Airbnb	4%	6%
MaineTourism.com	6%	6%
VRBO/HomeAway	4%	5%
Instagram	6%	5%
Vacation rental websites	3%	5%
Airline websites	5%	4%
MainesMidCoast.com	2%	4%
MaineLakesandMountains.com	3%	4%
VisitBarHarbor.com	3%	3%
DiscoverNewEngland.com	3%	2%
TheMaineHighlands.com	2%	2%
VisitPortland.com	2%	2%
Twitter	4%	2%
KennebecValley.org	2%	1%
Other	3%	3%
None	28%	20%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2022	2023
Advice from friends/family	30%	31%
AAA	10%	13%
Travel guides/brochures	10%	13%
Travel planning apps	17%	13%
Called the Maine Office of Tourism	4%	9%
Articles or travelogues	7%	9%
Travel books & magazines	6%	8%
Visitor Guide	3%	7%
Visit Maine e-newsletter	4%	6%
Called local Chambers of Commerce	5%	4%
Travel agent	5%	4%
Called another Tourism/Lodging Association	4%	3%
Called local convention and visitors bureaus	3%	2%
Other	2%	3%
None	31%	26%

*Multiple responses permitted.

REASON FOR VISITING*

Reasons for Visiting	2022	2023
Visiting friends/relatives	30%	33%
Sightseeing/touring	17%	24%
Relax and unwind	24%	23%
Nature & bird watching	17%	20%
Active outdoor activities	21%	14%
Snow activities	11%	14%
Special event	11%	13%
Special occasion	11%	12%
Conference/meeting	9%	7%
Shopping	9%	7%
Sporting event	4%	5%
Water activities	6%	5%
Beach	3%	4%
Attractions	3%	3%
Culture/museums/history	3%	3%
Astrotourism	2%	3%
Other	6%	8%

*Multiple responses permitted.

TV SHOWS & FILM*

Trip Inspiration From Film	2022	2023
Yes	NA	8%
No	NA	92%
Don't know	NA	<1%

How Film Inspired Trip**	2022	2023
Visiting a location related to a TV show or film was the main reason I visited Maine	NA	37%
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	NA	32%
Seeing Maine in a film or TV show made me think about Maine as a place to visit	NA	16%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	NA	11%
Something else	NA	4%

Visited TV or Film Attractions***	2022	2023
Yes	NA	6%
No	NA	92%
Don't know	NA	2%

*Questions were not asked until January 2023.
**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	2022	2023
No other states/provinces	70%	68%
New Hampshire	15%	16%
Vermont	9%	9%
Massachusetts	7%	8%
New York	6%	6%
New Brunswick	5%	4%
Nova Scotia	5%	4%
Connecticut	4%	3%
Rhode Island	5%	3%
Quebec	3%	3%
Newfoundland and Labrador	4%	1%
Ontario	2%	1%
Prince Edward Island	3%	1%
Other	2%	1%

*Multiple responses permitted.

ADVERTISING/PROMOTIONS

Recalled Advertising	2022	2023
Yes	41%	40%
No	34%	43%
Not sure	25%	17%

Influenced by Advertising	2022	2023
Yes	27%	26%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recall*	2022	2023
Social media	37%	38%
Internet	29%	30%
Billboard	24%	20%
Cable or satellite television	15%	18%
Magazine	18%	18%
VisitMaine.com	10%	15%
AAA	9%	13%
Maine travel/visitor guide	10%	12%
Radio	12%	12%
Traveler reviews/blogs	7%	11%
Brochure	10%	9%
Newspaper	12%	8%
Music/podcast streaming	6%	7%
Online streaming service	8%	6%
Deal – based promotion	4%	4%
Other	2%	2%
Not sure	2%	1%

*Multiple responses permitted.

VISITOR JOURNEY : TRAVELER PROFILE

ORIGIN REGION

Region of Origin	2022	2023
Maine	32%	33%
New England	24%	20%
Mid-Atlantic	11%	8%
Southeast	6%	6%
Southwest	1%	3%
Midwest	3%	6%
West	3%	6%
Canada	19%	17%
International	1%	1%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2022	2023
Maine	32%	33%
New Brunswick	10%	11%
New Hampshire	15%	10%
Massachusetts	6%	6%
Quebec	5%	4%
Florida	2%	3%
New York	5%	3%
California	1%	2%
Connecticut	2%	2%
Pennsylvania	2%	2%
Texas	1%	2%
Nova Scotia	3%	2%

ORIGIN MARKET

Origin Markets	2022	2023
Rochester - Portsmouth, NH	9%	6%
Bangor	4%	4%
Portland	2%	4%
New York City[1]	4%	3%
Boston	3%	3%
Kittery	2%	3%
Presque Isle	3%	3%
Fredericton, CAN	4%	3%
Saint John, CAN	1%	3%
Auburn - Lewiston	1%	2%
Ft. Kent – St. Agatha	3%	2%
Moncton, CAN	2%	2%
Halifax, CAN	3%	2%
Montreal, CAN	2%	2%

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

TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2022	2023
As a couple	32%	40%
Traveled alone	28%	24%
As a family	19%	20%
With other couples/friends	17%	14%
With business associates	3%	1%
In a tour group	1%	1%
Other	<1%	<1%
Average Travel Party Size	**2.5**	**2.3**

TRAVEL WITH CHILDREN*

Children in Travel Party*	2022	2023
No children	85%	86%
Children younger than 6	4%	4%
Children 6 – 12	8%	8%
Children 13 – 17	8%	7%

Gender	2022	2023
Male	55%	52%
Female	45%	48%

*Multiple responses permitted.

DEMOGRAPHIC PROFILE

Age	2022	2023
Under 25	7%	3%
25 – 34	13%	15%
35 – 44	23%	23%
45 – 54	19%	21%
55 – 65	13%	15%
Over 65	25%	23%
Median Age	**49**	**49**

Race/Ethnicity	2022	2023
White	88%	89%
Indigenous	4%	4%
Asian	3%	2%
Hispanic	2%	2%
Black	2%	1%
Other	1%	2%

LIFESTYLE PROFILE

Marital Status	2022	2023
Single/widowed	33%	29%
Married/living with partner	67%	71%

Employment Status	2022	2023
Employed full-time	53%	57%
Employed part-time	7%	6%
Contract/freelance/temporary employee	5%	6%
Retired	28%	26%
Not currently employed	4%	4%
Student	3%	1%

LIFESTYLE PROFILE

Household Income	2022	2023
Less than $25,000	7%	4%
$25,000 - $49,999	23%	17%
$50,000 - $74,999	20%	23%
$75,000 - $99,999	18%	17%
$100,000 - $149,999	17%	17%
$150,000 - $199,999	9%	11%
$200,000 - $249,999	3%	8%
$250,000 or more	3%	3%
Median Household Income	$75,000	$83,800

LIFESTYLE PROFILE

Educational Attainment	2022	2023
High school or less	26%	26%
Some college or technical school	15%	13%
College or technical school graduate	44%	45%
Graduate school	15%	16%

NEW & RETURNING VISITORS

Previous Trips to Maine	2022	2023
This is my first time	21%	21%
2 - 5 times	28%	31%
6 - 10 times	17%	15%
11+ times	34%	33%

VISITOR JOURNEY : TRIP EXPERIENCE

TRANSPORTATION

Means of Transportation	2022	2023
Drove to Maine	78%	77%
Flew into Bangor Intl Airport	7%	5%
Flew into Boston Logan Intl	1%	5%
Flew into Portland Intl Jetport	2%	4%
Took a motor coach tour or bus	4%	3%
Flew into Presque Isle Airport	4%	2%
Traveled by train	1%	1%
Flew into Augusta State Airport	1%	<1%
Other	2%	3%

LENGTH OF STAY

Nights Stayed	2022	2023
Not staying overnight	15%	17%
1 night	8%	5%
2 nights	21%	15%
3 nights	16%	15%
4 nights	10%	12%
5+ nights	30%	36%
Average Length of Stay	4.0	3.7

ACCOMMODATIONS

Accommodations	2022	2023
Friends/family home	31%	30%
Hotel/motel/resort	19%	23%
Not spending the night	15%	17%
Bed & Breakfast/Inn	6%	6%
Personal second home	7%	6%
Campground/RV Park	6%	4%
Vacation rental home	4%	4%
Sporting camp/wilderness lodge	3%	3%
Wilderness camping	4%	2%
Outdoor Outfitter	3%	2%
Other	2%	3%

BOOKING

Booking Methods	2022	2023
Directly with the hotel/condo	35%	35%
Online travel agency	27%	33%
Airbnb	7%	5%
Short term rental service	3%	5%
Offline travel agent	4%	5%
Travel package provider	2%	2%
Vacation rental company	2%	1%
Group tour operator	1%	<1%
Other	19%	14%

IN-MARKET RESOURCES*

In-Market Resources	2022	2023
Navigation website/apps	33%	40%
Trip planning app	16%	17%
Visitor Information Centers	11%	16%
VisitMaine.com	8%	13%
Hotel/resort website/app	7%	13%
Personal social media	15%	13%
Booking website/app	10%	12%
Destination social media	14%	12%
Restaurant website/app	11%	11%
Materials from hotel/campground	6%	10%
Airline website/app	5%	4%
Chambers of Commerce	4%	4%
Other	3%	4%
None	25%	18%

*Multiple responses permitted.

ACTIVITIES*

Activities	2022	2023
Active outdoor activities	51%	50%
Touring/sightseeing	44%	48%
Food/beverage/culinary	44%	46%
Shopping	26%	34%
Water activities	18%	17%
Astrotourism	10%	16%
History/culture	13%	15%
Entertainment/attractions	11%	12%
Business conference/meeting	9%	7%
Other	10%	8%

*Multiple responses permitted.

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2022	2023
Visited Farmer's Markets	14%	17%
Enjoying local food at fairs/festivals	12%	14%
Consumed other locally produced Maine foods	15%	14%
Going to local brew pubs/craft breweries	21%	11%
Enjoyed unique Maine food or beverages	13%	11%
Ate other local seafood	9%	11%
Ate lobster	12%	10%
Enjoyed high-end cuisine or five-star dining	6%	8%
Ate farm-to-table or organic cuisine	3%	1%
Other	5%	4%

*Multiple responses permitted.

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2022	2023
Sightseeing	32%	40%
Driving for pleasure	23%	34%
Enjoying the mountain views	23%	29%
Wildlife viewing/bird watching	22%	29%
Enjoying the ocean views/rocky coast	20%	27%
Photography	19%	26%
Tours of communities/local architecture	11%	19%
Nature cruises or tours	10%	15%
Viewing fall colors	12%	10%
Other	1%	1%

*Multiple responses permitted.

SHOPPING ACTIVITIES*

Shopping Activities	2022	2023
Shopping for unique/locally produced goods	8%	12%
Shopping in downtown areas	8%	12%
Shopping for gifts/souvenirs	8%	11%
Outlet shopping	7%	8%
Shopping for antiques/local arts and crafts	6%	8%
Shopping at malls	8%	8%
Shopping for "Made in Maine" products	5%	6%
Other	3%	4%

*Multiple responses permitted.

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2022	2023
Snowmobiling	10%	21%
Hiking/climbing/backpacking	17%	16%
Exploring State and National Parks	12%	13%
Riding all-terrain vehicles	19%	10%
Camping	9%	7%
Hunting	13%	6%
Bicycling touring	4%	4%
Snowshoeing	2%	3%
Mountain/Fat Biking	6%	3%
Alpine skiing/snowboarding	2%	1%
Nordic skiing	1%	1%
Other	2%	2%

*Multiple responses permitted.

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2022	2023
Visit historic sites/museums	11%	14%
Get to know the local people and/or culture	10%	13%
Visit art museums/local artisan studios	3%	7%
Attend plays/musicals/theatrical events	1%	1%
Attend popular music concerts/events	1%	1%
Painting/drawing/sketching	1%	1%
Attend operas/classical music events	1%	<1%
Other	<1%	<1%

*Multiple responses permitted.

WATER ACTIVITIES*

Water Activities	2022	2023
Fishing	14%	11%
Outdoor swimming	9%	8%
Canoeing/kayaking	10%	5%
Going to the beach	5%	5%
White water rafting	5%	4%
Motor boating	7%	4%
Water skiing/jet skiing	5%	4%
Pool swimming	2%	3%
Sailing	2%	3%
Surfing	2%	3%
Other	<1%	<1%

*Multiple responses permitted.

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2022	2023
Agricultural fairs	2%	4%
Attend sporting events	4%	4%
Amusement/theme parks	2%	2%
Outdoor fun centers	3%	2%
Horseback riding	<1%	2%
Animal parks/zoos	2%	1%
Summer camps	1%	1%
Bars/nightlife	4%	1%
Children's museums	1%	<1%
Water parks	1%	<1%
Other	<1%	1%

*Multiple responses permitted.

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2022	2023
No other states/provinces	74%	70%
New Hampshire	12%	14%
Massachusetts	7%	10%
Vermont	7%	7%
New York	6%	5%
Connecticut	3%	4%
New Brunswick	6%	4%
Rhode Island	3%	2%
Nova Scotia	3%	2%
Ontario	3%	2%
Quebec	3%	2%
Newfoundland and Labrador	2%	1%
Prince Edward Island	2%	1%
Other	2%	1%

*Multiple responses permitted.

TRAVELING IN MAINE*

Maine Regions Visited	2022	2023
No other regions	49%	46%
The Maine Highlands	27%	27%
Downeast & Acadia	19%	23%
The Maine Beaches	18%	21%
Midcoast & Islands	14%	17%
Greater Portland & Casco Bay	11%	11%
Kennebec Valley	11%	10%
Maine Lakes & Mountains	11%	9%
Other	1%	2%

*Multiple responses permitted.

VISITOR JOURNEY : POST-TRIP EVALUATION

RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2022	2023
Would recommend Maine	97%	97%
Would not recommend Maine	1%	1%
Not sure	2%	2%

Recommending Regions	2022	2023
Definitely recommend region	77%	83%
Probably would recommend region	18%	14%
Would not recommend region	1%	1%
Not sure	4%	2%

RETURNING TO MAINE

Returning to Maine	2022	2023
Definitely will return	75%	77%
Probably will return	20%	19%
Probably will not return	1%	1%
Not sure	4%	3%

SATISFACTION

Satisfaction	2022	2023
Very satisfied	68%	71%
Satisfied	30%	28%
Dissatisfied	<1%	<1%
Don't know	2%	1%

TRIP EXPECTATIONS

Exceeded Expectations	2022	2023
Friendliness of people	61%	62%
Activities & attractions	54%	57%
Authentic & unique communities	51%	49%
Customer service	41%	43%
Lodging	41%	41%
Value for your money	36%	29%
Restaurants	25%	27%
Shopping	30%	27%

OVERCROWDING

Overcrowding	2022	2023
Overcrowded	6%	4%
A little overcrowded	12%	12%
The number of visitors was fine	34%	46%
Not at all overcrowded	46%	38%
Other	2%	<1%

STUDY METHODS

METHODOLOGY

Visitor Tracking

255 interviews were completed with visitors to Aroostook County online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2022 and November 30th, 2023.

Economic Impact

Total economic impact of tourism on Aroostook County is a function of direct spending by visitors to Aroostook County, 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 Aroostook County. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Aroostook County's multiplier is 1.50.

AROOSTOOK COUNTY

2023 Economic Impact & Tracking Report

DECEMBER 2022 – NOVEMBER 2023

Downs & St. Germain Research
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