

# KENNEBEC VALLEY

2023 Economic Impact & Visitor Tracking Report

DECEMBER 2022 – NOVEMBER 2023



# 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



# KENNEBEC VALLEY

Compared to visitors to other regions, visitors to Kennebec Valley region are more likely to:

- » Say the value for their money, customer service, and friendliness of people exceeded their expectations
- » Use fewer planning resources to help plan their trip
- » Visit a location of a TV show or film while in Maine
- » Stay over night in a personal second home



# VISITOR JOURNEY: IMPACT OF TOURISM

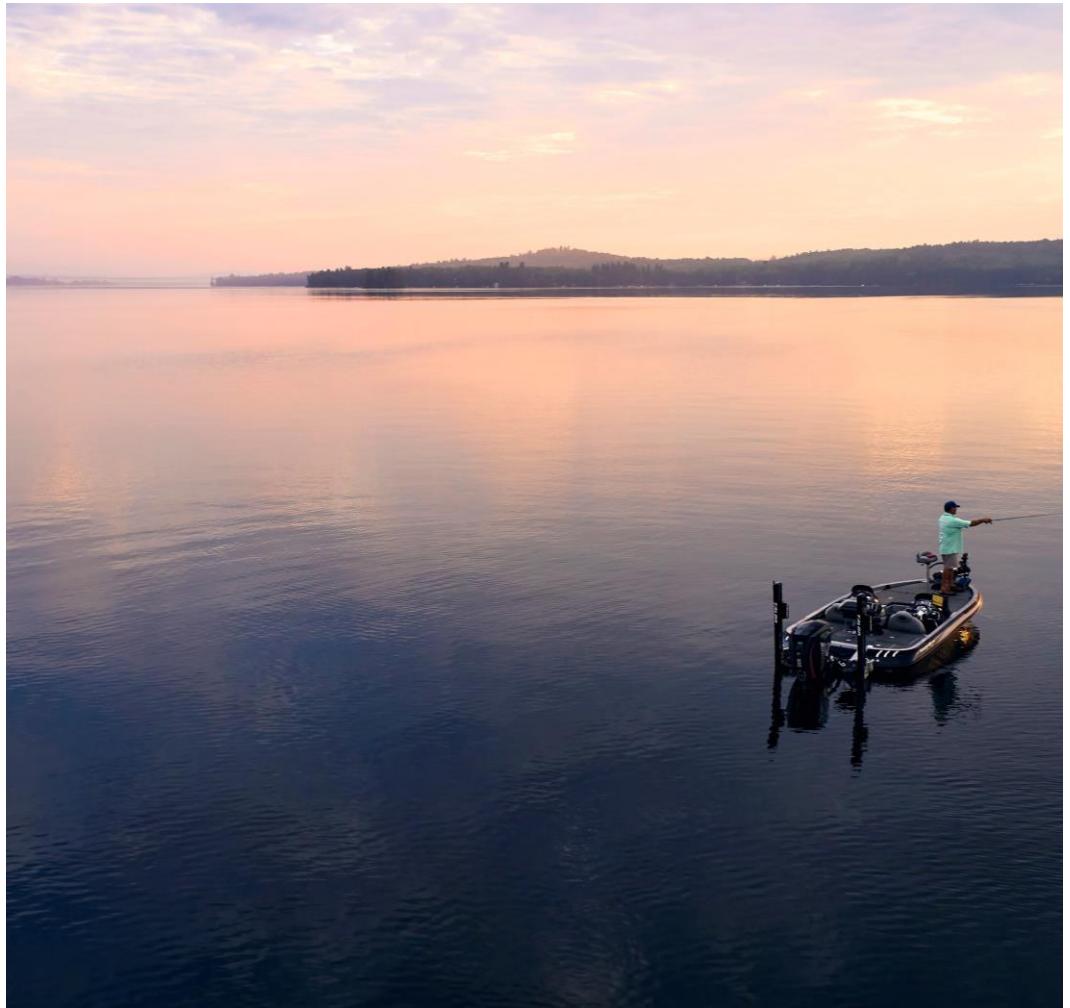


# ECONOMIC IMPACT

Visitor spending generated

**\$826,352,700**

in economic impact to Kennebec Valley's economy, down 7.0% from 2022



# DIRECT SPENDING

Visitors to Kennebec Valley spent

**\$553,723,700**

throughout the county in 2023 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, down 2.7% from 2022



# VISITORS

Kennebec Valley attracted  
**905,000**  
visitors in 2023, up 9.0% from 2022



# VISITORS DAYS\*

All visitors to Kennebec Valley spent

**4,901,700**

days in Kennebec Valley throughout 2023, up  
19.6% 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 Kennebec Valley generated

**603,800**

nights in Kennebec Valley accommodations  
throughout 2023, up 3.1% from 2022



# JOBS SUPPORTED\*

Visitors to Kennebec Valley supported

**7,540**

jobs throughout the county in 2023, down  
14.2% 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.

Kennebec Valley

# WAGES GENERATED

Visitors to Kennebec Valley supported

**\$284,844,100**

in wages paid to Kennebec Valley employees  
in 2023, down 0.4% from 2022



# VISITORS & JOBS

Every  
**120**  
visitors supports a new job in Kennebec Valley



# HOUSEHOLD SAVINGS

Visitors to Kennebec Valley saved local households

**\$1,122**

in state and local taxes in 2023



# LODGING METRICS\*

Occupancy Rate

**50.2%**

- 7.9% from 2022

Average Daily Rate

**\$154.19**

- 0.3% from 2022

Revenue per Available Room

**\$77.38**

- 8.2% 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.

Kennebec Valley

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**DS** downs & st. germain  
RESEARCH

# VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Traveler  
Profile

Trip  
Experience

Post-Trip  
Evaluation

Impact of  
Tourism

# TRIP PLANNING CYCLE

- » **68%** of visitors started planning their trip a month or more in advance of their trip
- » **64%** of visitors have a booking window of less than 3 months



# TOP TRIP PLANNING SOURCES\*



37% Advice from family/friends



29% Online search engines



17% Articles or travelogues



14% VisitMaine.com

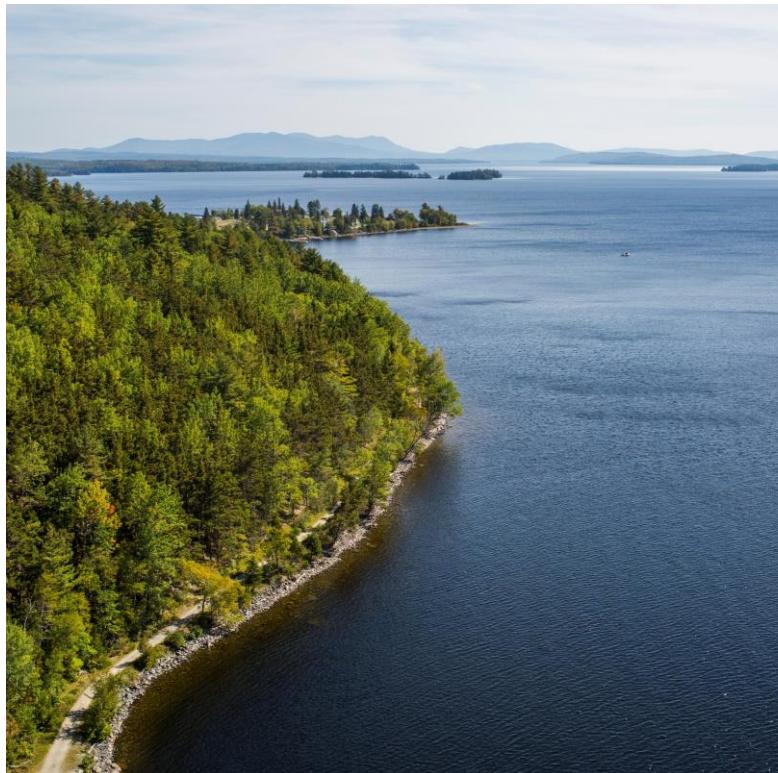


14% Facebook

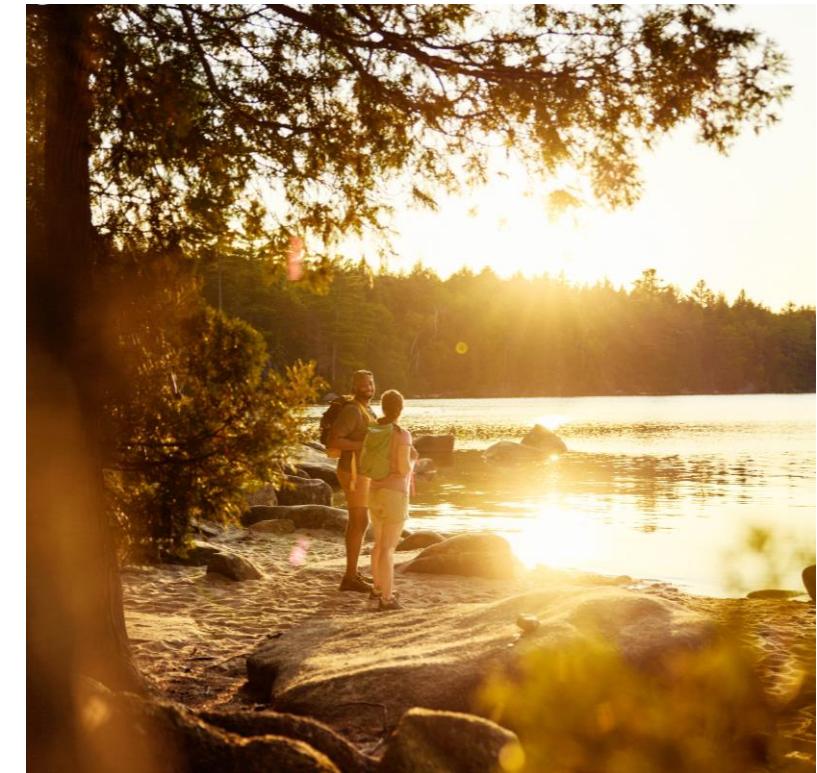
# TOP REASONS FOR VISITING\*



33% Visit friends/family



28% Relax and unwind



27% Sightseeing and touring

# CONSIDERING MAINE AS A DESTINATION

- » Like last year, over **3 in 5** visitors considered visiting **ONLY** Maine while planning their trips
- » Nearly **1 in 4** visitors considered visiting New Hampshire while planning their trips
- » Visitors continued to be more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces



# TV SHOWS & FILM\*

- » **11%** of visitors said a TV show or film inspired their tip to Maine
- » **62%** of visitors who were inspired by a TV show or film said visiting a location of a TV show/film was one of the activities they engaged in



\*Questions were not asked until January 2023.

# PRE-TRIP RECALL OF ADVERTISING

- » Nearly **half** of visitors recalled advertising or promotions for Maine prior to their trip (-2% points from 2022)
- » Like last year, this information influenced **25% of all** visitors to visit Maine



# TOP SOURCES OF ADVERTISING RECALL\*

Base: 46% of visitors who recalled advertising



55% Social media

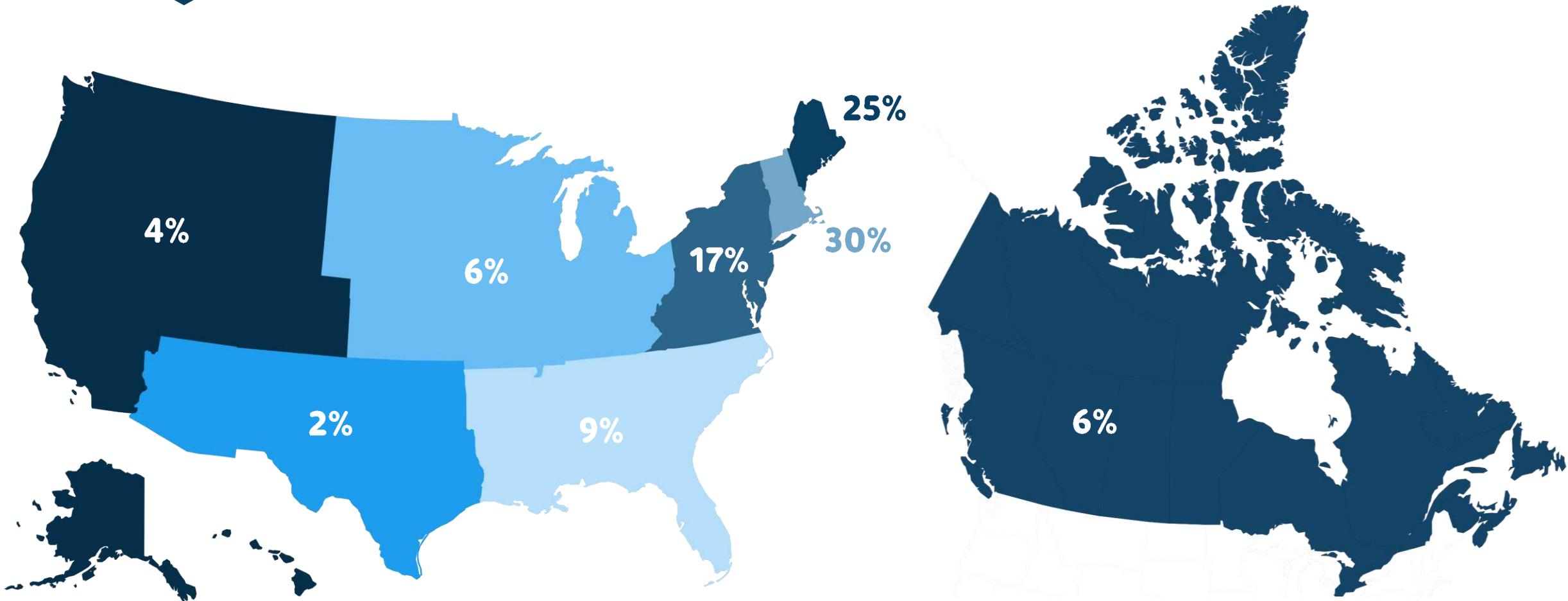


41% Internet

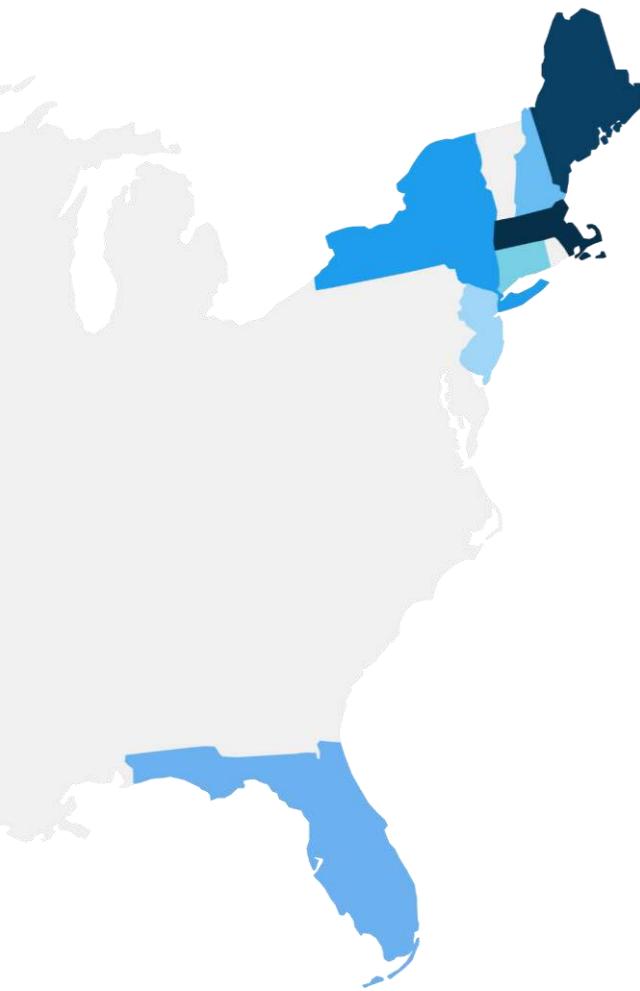
# VISITOR JOURNEY: TRAVELER PROFILE



# REGIONS OF ORIGIN



# TOP ORIGIN STATES & PROVINCES



# 65%

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

- 25 % Maine
- 16 % Massachusetts
- 6 % New York
- 6 % New Hampshire

- 4 % Florida
- 4 % New Jersey
- 4 % Connecticut

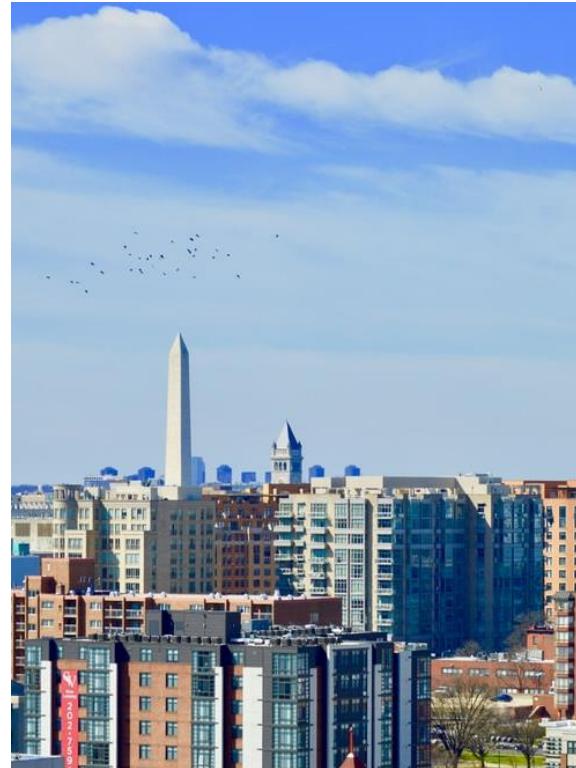
# TOP ORIGIN MARKETS



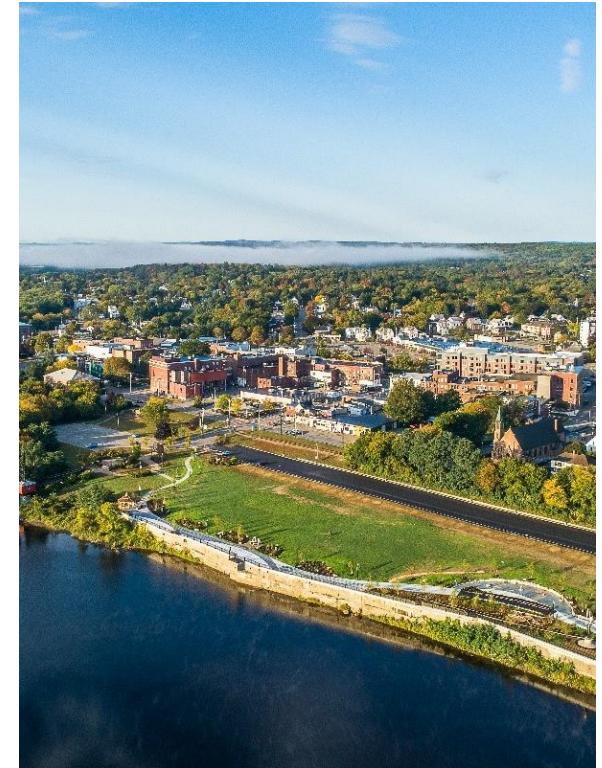
10% Boston



7% New York City<sup>1</sup>



4% Washington DC –  
Baltimore<sup>2</sup>



4% Waterville

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

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

# TRAVEL PARTIES

The typical Maine visitor traveled with **3.1** people in their visitor party



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



# VISITOR PROFILE

- » The typical Maine visitor:
  - » Is **48** years old<sup>1</sup>
  - » Is white – **90%**
  - » Is a college graduate – **70%**
  - » Is married/in a domestic partnership – **74%**
  - » Is employed full-time – **56%**
  - » Has an annual household income<sup>2</sup> of **\$88,200**



<sup>2</sup> Median age.

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

# NEW & RETURNING VISITORS

- » 15% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 38% had previously traveled in Maine more than 10 times



# VISITOR JOURNEY : TRIP EXPERIENCE



# TRANSPORTATION

- » Maine is a drive-market for most visitors, with **85%** choosing to travel by car over plane, motor coach/bus, or train



# NIGHTS STAYED

- » 83% of visitors stayed one or more nights in Maine on their trip (+6% points from 2022)
- » Typical visitors stayed 5.3\* nights in Maine on their trips



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

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RESEARCH

# TOP ACCOMMODATIONS



21% Friends/family home



20% Hotel/motel/resort



17% Did not stay overnight

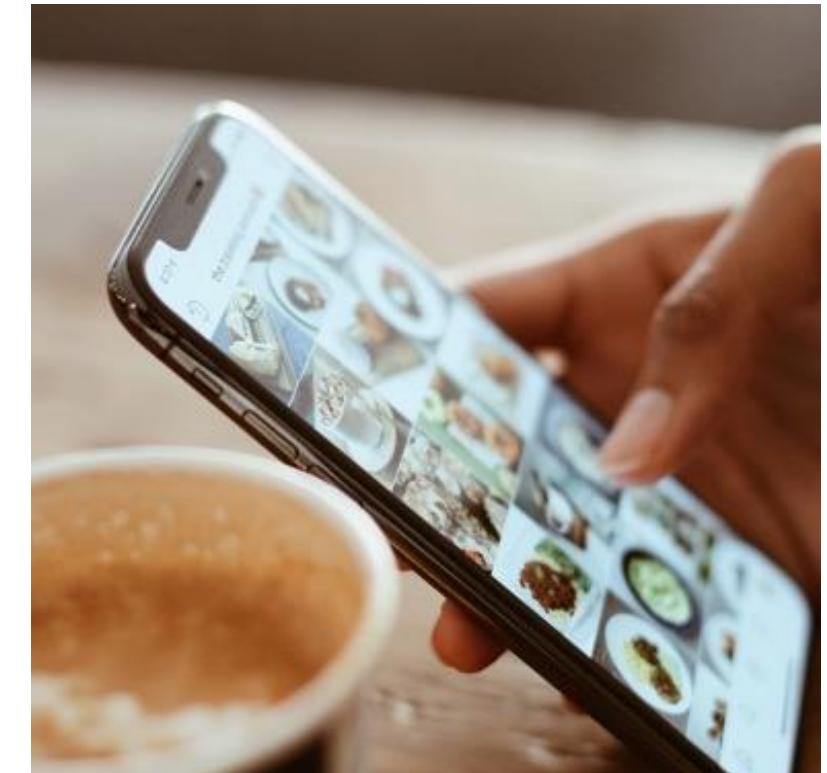
# TOP IN-MARKET VISITOR RESOURCES\*



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



26% Restaurant website/app

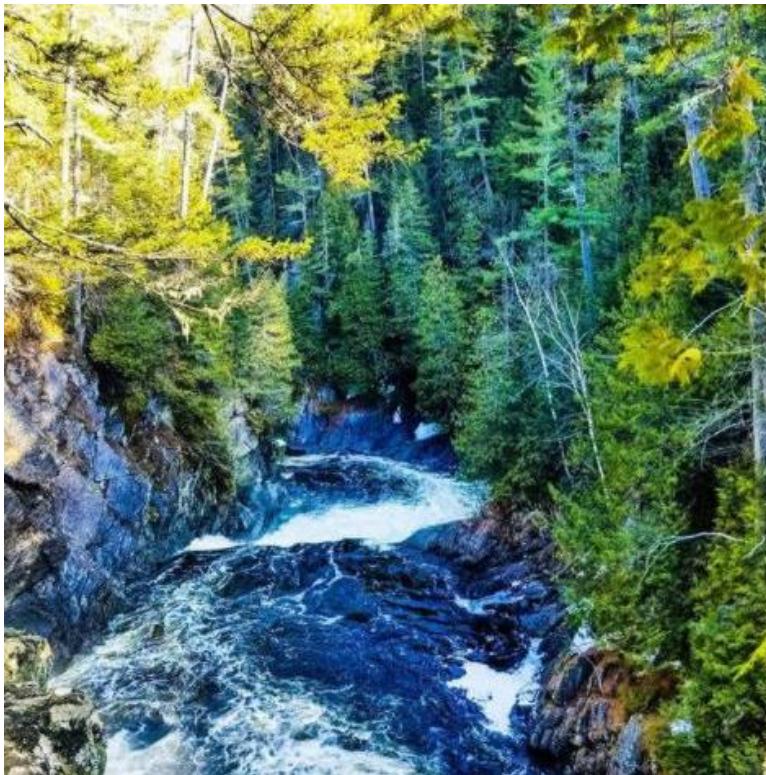


21% Personal social media

# TOP VISITOR ACTIVITIES\*



65% Food/beverage/culinary



48% Touring/sightseeing



48% Active outdoor activities

# VISITING OTHER STATES & PROVINCES

- » Nearly **2 in 3** visitors did not visit any other U.S. state or Canadian province during their trip
- » About **1 in 4** visitors visited New Hampshire
- » 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

- » **1 in 3** visitors visited the Midcoast & Islands in addition to their primary destination within Maine
- » Nearly **2 in 5** visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+15% points from 2022)



# 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
- » **96%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **71%** 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
- » **2 in 3** visitors were very satisfied with their trip to Maine



# OVERCROWDING

- » 55% of visitors thought the number of visitors during their trip to Maine was fine (+21% points from 2022)
- » 16% of visitors thought 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	826,200	830,300	905,000	+ 9.0%
Visitor Days*	NA	4,099,600	4,901,700	+ 19.6%
Room nights generated	523,700	585,800	603,800	+ 3.1%
Direct expenditures	\$546,020,200	\$568,830,400	\$553,723,700	- 2.7%
<b>Total economic impact</b>	<b>\$859,395,100</b>	<b>\$888,655,700</b>	<b>\$826,352,700</b>	<b>- 7.0%</b>

\*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

<b>Kennebec Valley Jobs</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>Δ% from '22</b>
Jobs supported (direct)	7,400	6,800	6,000	- 11.8%
Total jobs supported	9,700	8,790	7,540	- 14.2%*

<b>Kennebec Valley Wages</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>Δ% from '22</b>
Wages paid (direct)	\$201,072,000	\$195,695,400	\$201,311,500	+ 2.9%
Total wages paid	\$295,583,900	\$285,912,700	\$284,844,100	- 0.4%

\*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

<b>Return on Investment</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Visitors per job supported	85	94	120
State & local taxes supported	\$76,611,700	\$71,821,900	\$84,702,600
Tax savings per household	\$1,043	\$966	\$1,122

# LODGING METRICS\*

Lodging Metrics	2021	2022	2023	Δ% from '22
Occupancy Rate (%)	49.3%	54.5%	50.2%	- 7.9%
Average Daily Rate	\$132.95	\$154.73	\$154.19	- 0.3%
RevPAR	\$65.54	\$84.33	\$77.38	- 8.2%
Total Lodging Revenue**	\$76,784,300	\$92,819,300	\$99,917,500	+ 7.6%

\*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

Pre-Visit

Traveler  
Profile

Trip  
Experience

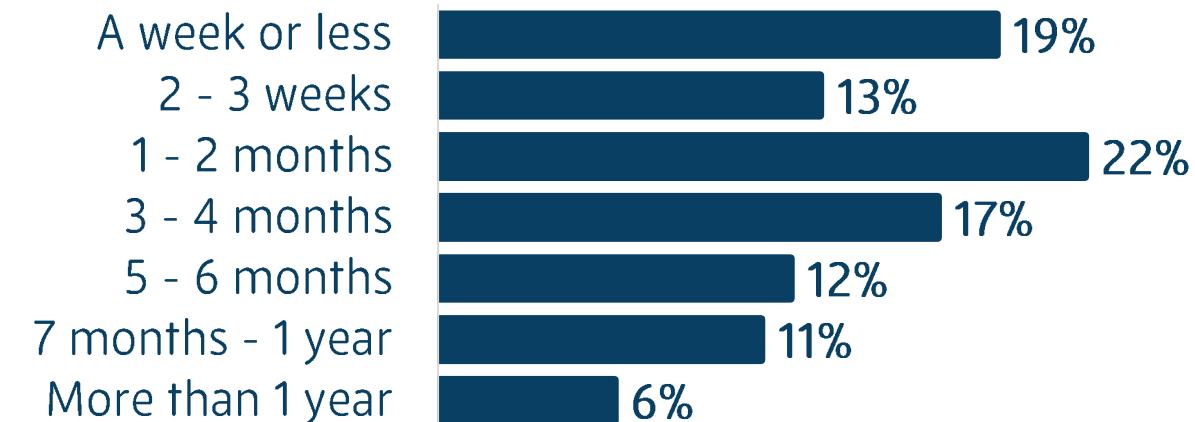
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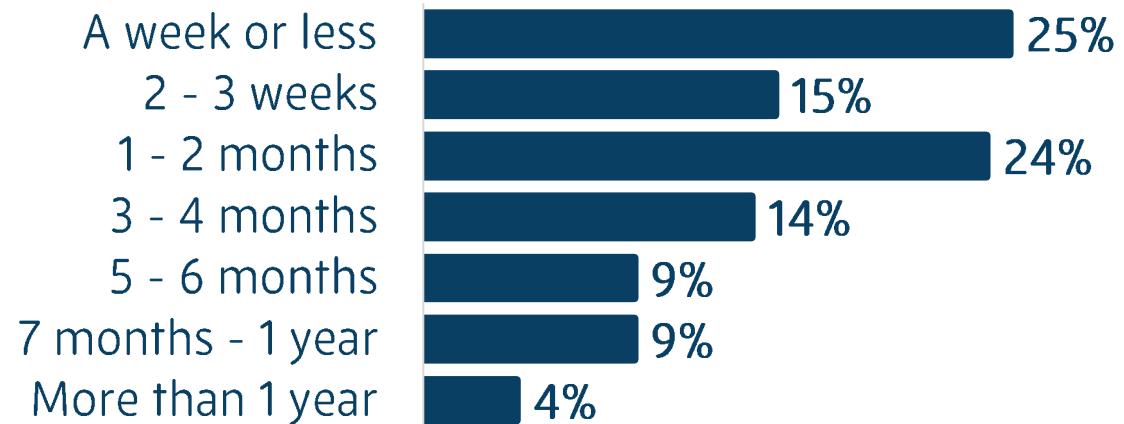
# TRIP PLANNING CYCLE

- » Typical visitors began planning their trip **55 days** in advance (+5 days from 2022)
- » **68%** of visitors started planning their trip a month or more in advance
- » Typical visitors booked their accommodations **43 days** in advance (+3 days from 2022)
- » **64%** of visitors have a booking window of less than 3 months

## Beginning of Trip Planning Cycle

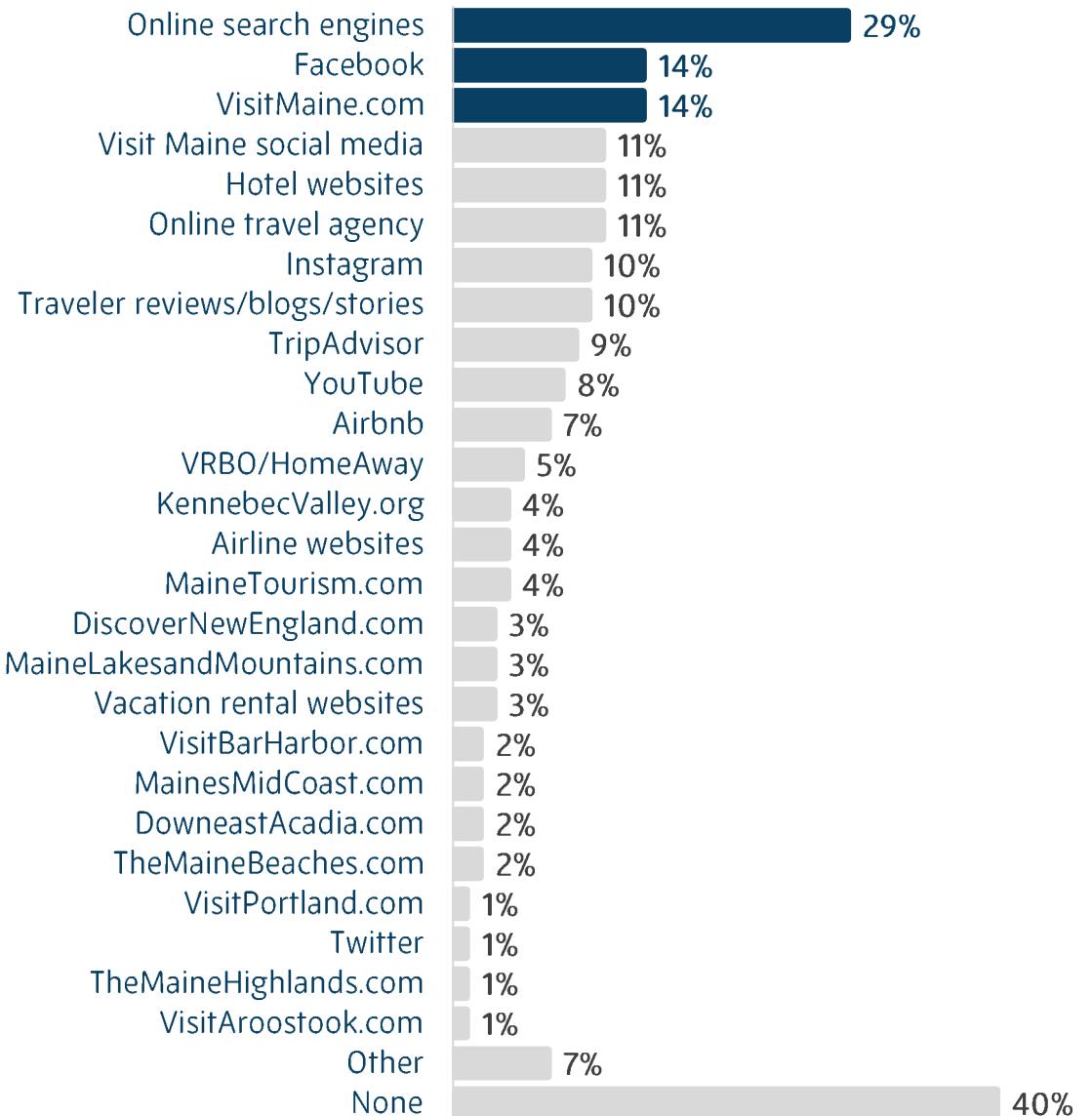


## Booked Accommodations/Made Trip Decisions



# ONLINE TRIP PLANNING SOURCES\*

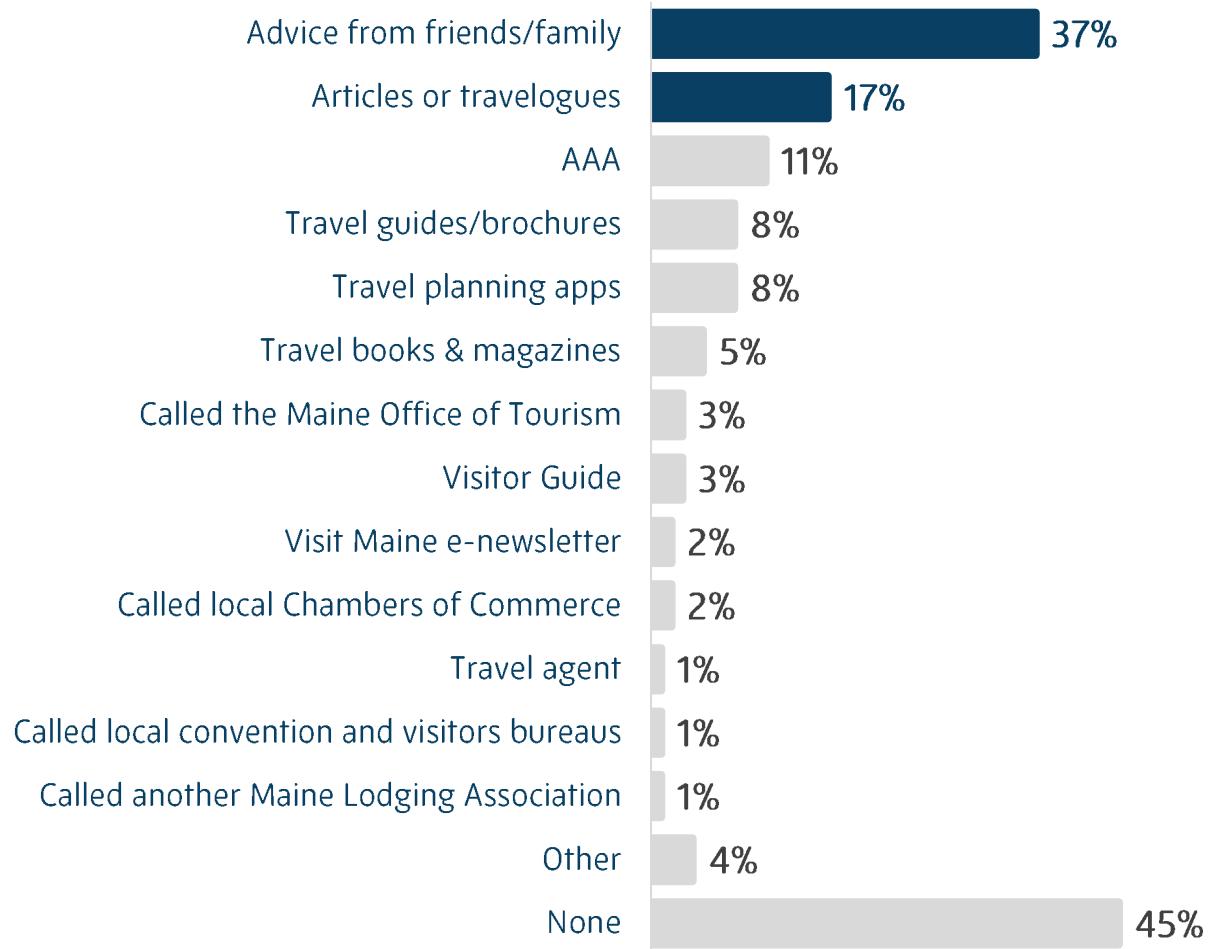
- » **3 in 5** visitors used one or more online resources to help them plan their trip in Maine
- » Nearly **3 in 10** visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » Nearly **1 in 6** visitors used Facebook to help plan their trip in Maine
- » Nearly **1 in 6** visitors used VisitMaine.com to help plan their trip in Maine (-3% points from 2022)



\*Multiple responses permitted.

# OTHER TRIP PLANNING SOURCES\*

- » Nearly **2 in 5** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » Over **1 in 6** looked at articles or travelogues to help plan their trip in Maine
- » Nearly **half** of visitors did not use any other resources to help them plan their trip in Maine



# REASONS FOR VISITING\*

- » **1 in 3** visitors came to Maine to visit friends and relatives
- » **Nearly 3 in 10** came to relax and unwind or for sightseeing/touring



\*Multiple responses permitted.

# TV SHOWS & FILM\*

- » **11%** of visitors said a TV show or film inspired their trip to Maine
- » Over **3 in 5** visitors who were inspired by a TV show or film said visiting a location of a TV show/film was one of the activities they engaged in
- » **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: 11% of visitors who were inspired by a TV show or film

Visiting a location of a TV show or film was one of the activities I engaged in while in Maine

62%

Seeing Maine in a film or TV show made me think about Maine as a place to visit

23%

I was considering Maine as a destination option and visiting a location related to a TV show or film was the deciding factor

9%

Visiting a location related to a TV show or film was the main reason I visited Maine

4%

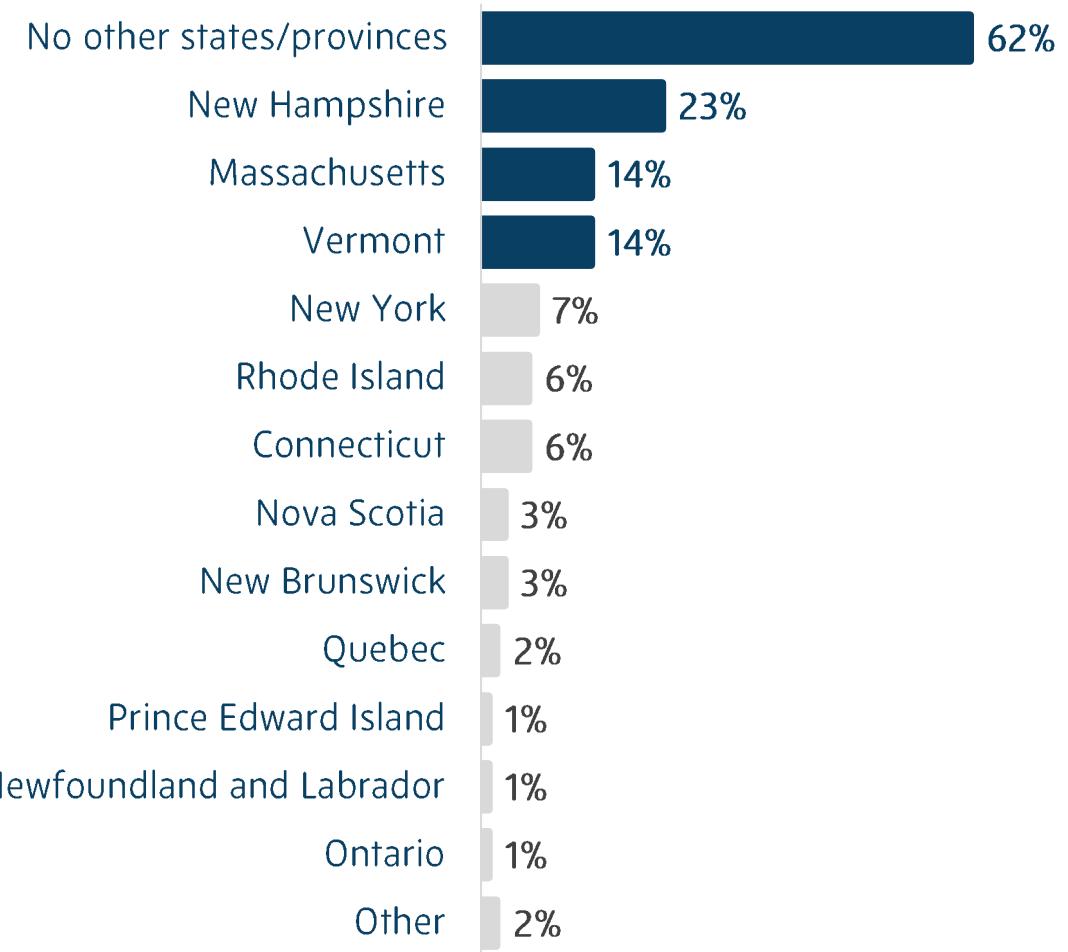
Something else

2%

\*Questions were not asked until January 2023.

# OTHER STATES & PROVINCES CONSIDERED\*

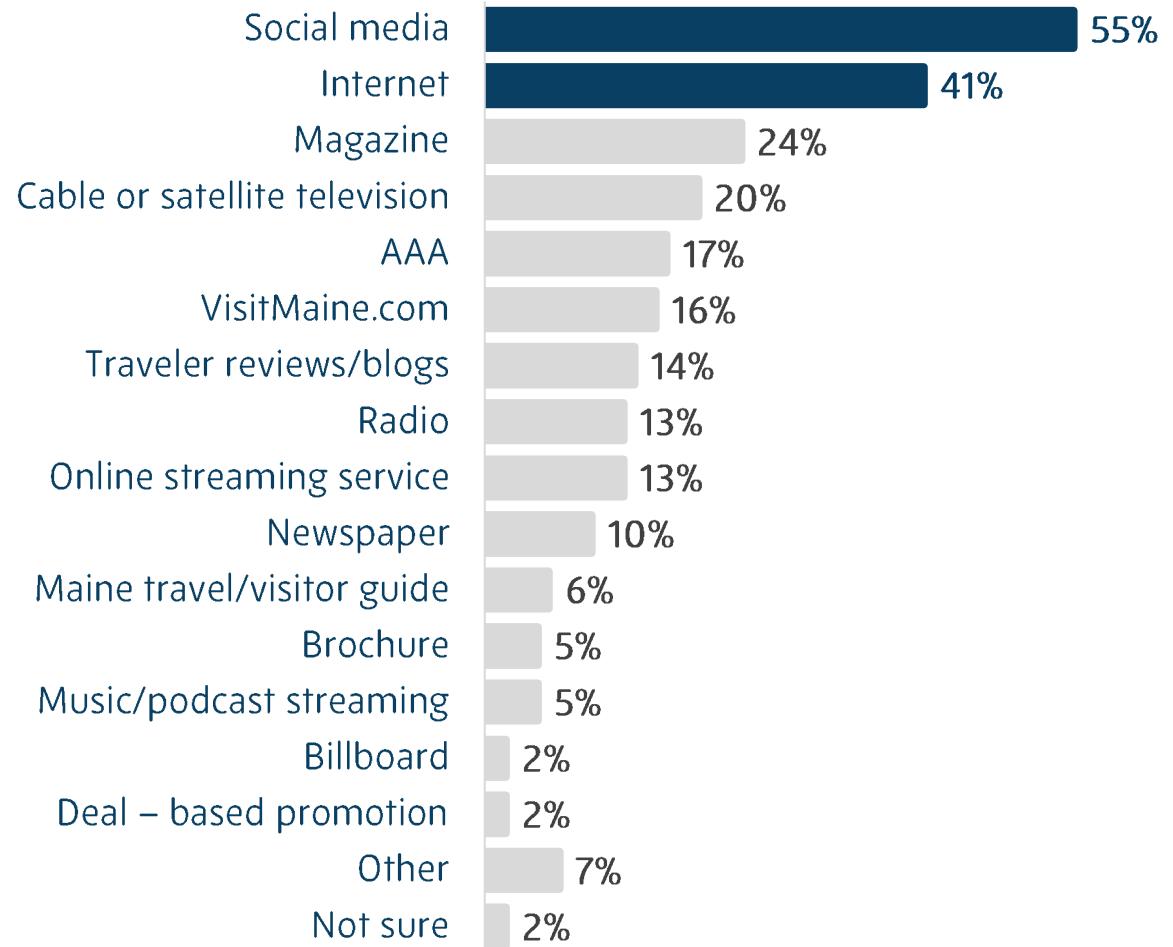
- » Like last year, over **3 in 5** visitors considered visiting **ONLY** Maine while planning their trips
- » Visitors were more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces
- » Nearly **1 in 4** visitors also considered New Hampshire
- » Around **1 in 7** also considered Vermont or Massachusetts



# PRE-TRIP RECALL OF ADVERTISING\*

- » Nearly **half** of visitors recalled advertising or promotions for Maine prior to their trip (-2% points from 2022)
- » Visitors who recalled this advertising primarily saw it on social media (+10% points from 2022) or the Internet
- » Like last year, this information influenced **25% of all** visitors to visit Maine

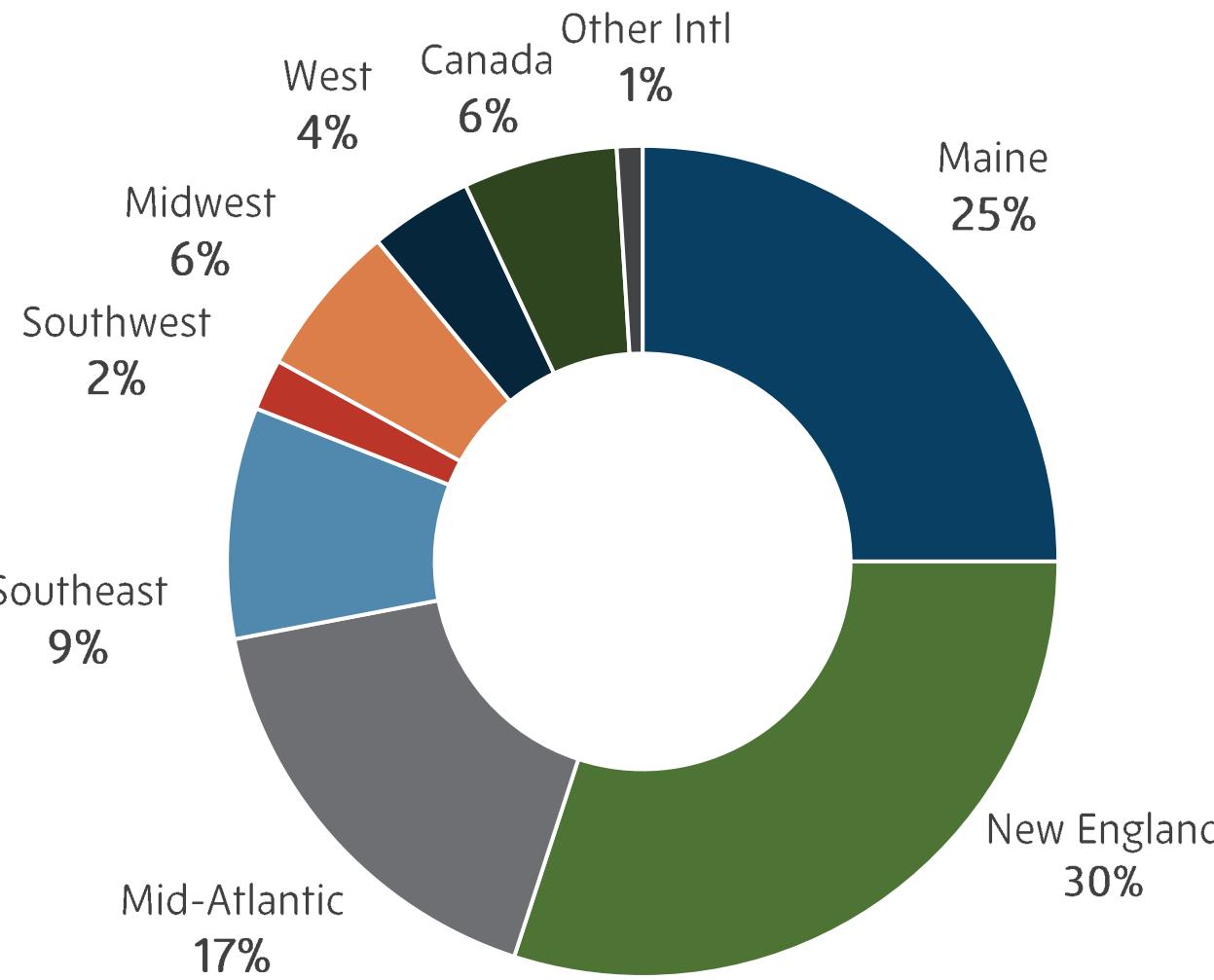
Base: 46% of visitors who recalled advertising



# VISITOR JOURNEY : TRAVELER PROFILE



# VISITOR ORIGINS



# TOP ORIGIN STATES & PROVINCES

- » **81%** of visitors traveled to/within Maine from 14 U.S. states and Canadian provinces
- » **1 in 4** visitors were residents of Maine traveling throughout the state

State/Province	Percent
Maine	25%
Massachusetts	16%
New York	6%
New Hampshire	6%
Florida	4%
New Jersey	4%
Connecticut	4%
Pennsylvania	3%
Quebec	3%
Virginia	2%
Ohio	2%
Maryland	2%
Rhode Island	2%
Ontario	2%

# TOP ORIGIN MARKETS

- » **35%** of visitors traveled from **8** U.S. markets
- » **17%** of visitors traveled to Maine from Boston and New York City

Market	Percent
Boston	10%
New York City <sup>1</sup>	7%
Washington DC - Baltimore <sup>2</sup>	4%
Waterville	4%
Portland	3%
Augusta	3%
Philadelphia	2%
Providence, RI	2%

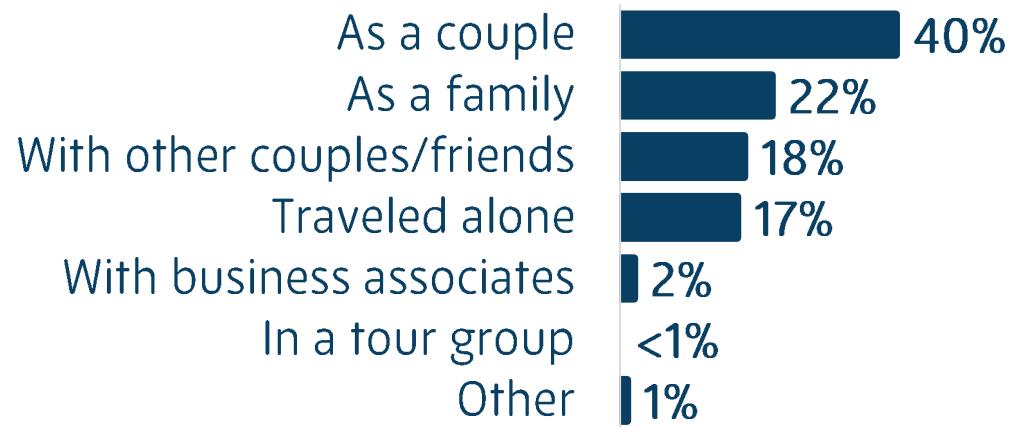
<sup>1</sup>Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

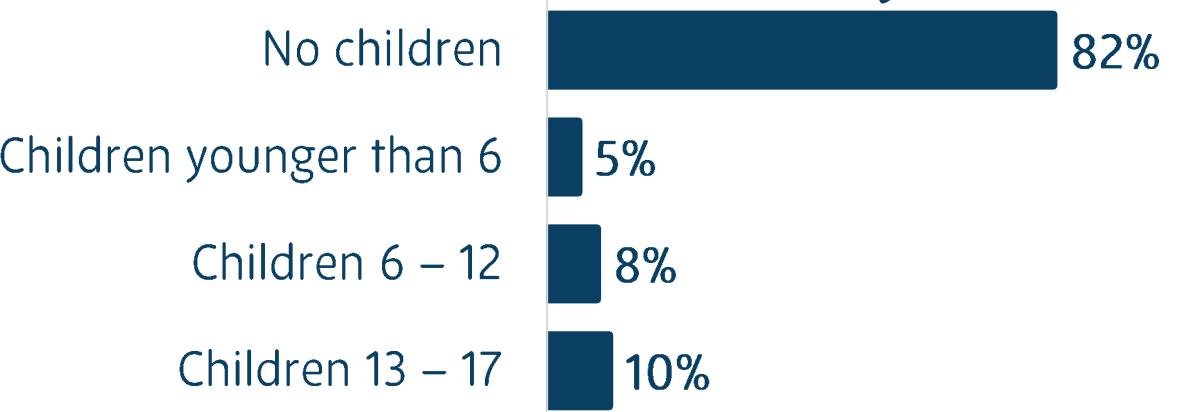
# TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **3.1** people
- » **2 in 5** visitors traveled as a couple
- » **18%** of visitors traveled with one or more children in their travel party

## Travel Party Composition



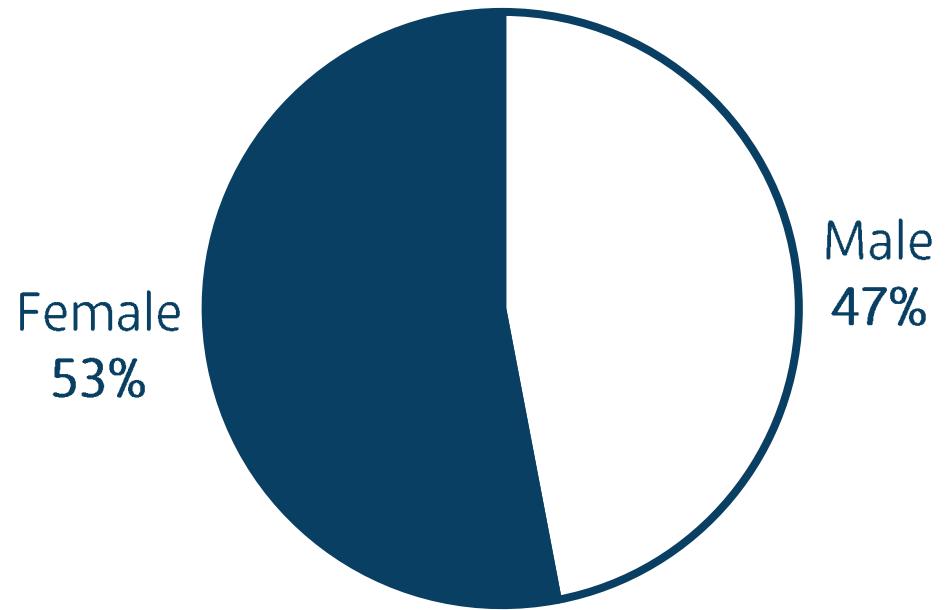
## Children in Travel Party\*



\*Multiple responses permitted.

# GENDER

- » More than **half** of visitors to Maine interviewed were female\*

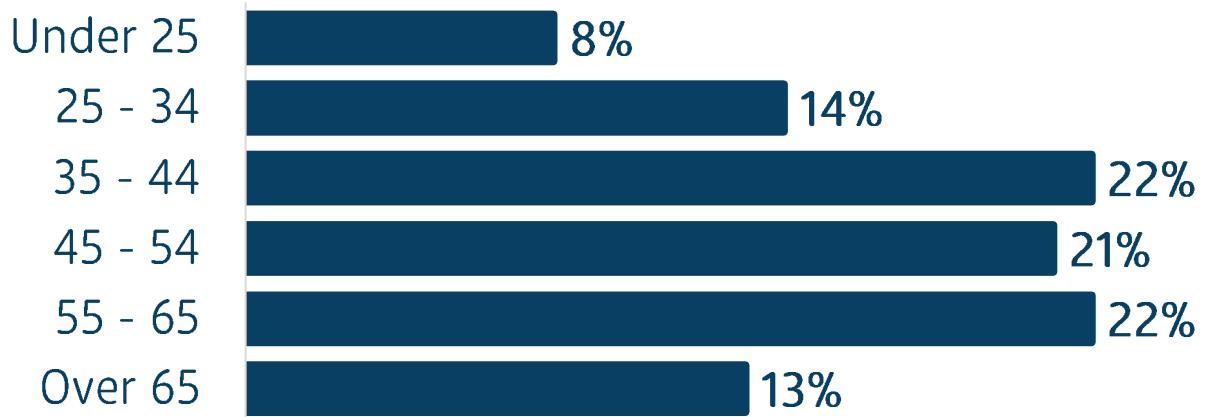


\*Gender of member of the travel party who was interviewed.  
May be influenced by visitors' willingness to complete a survey.

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



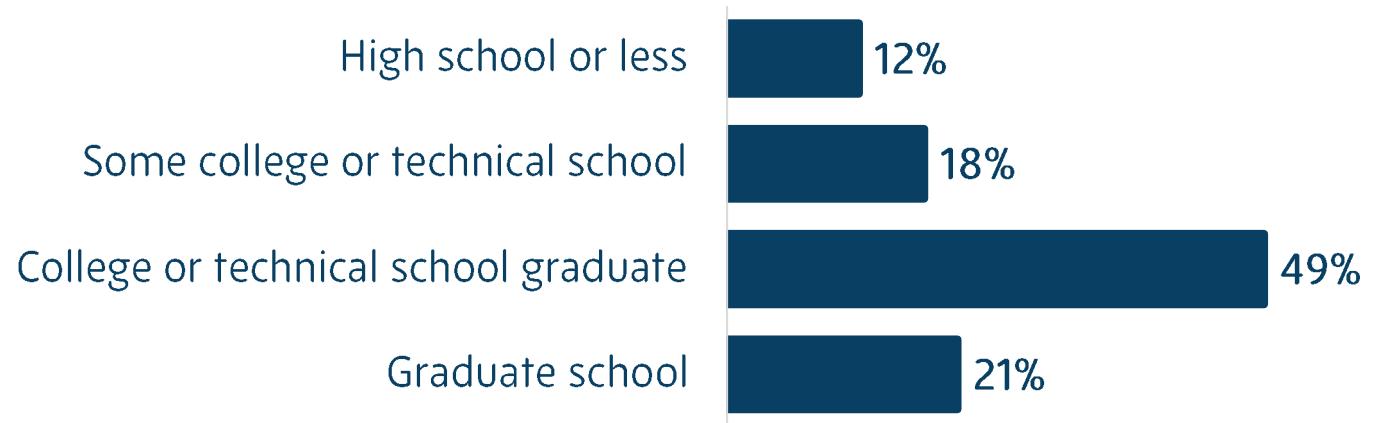
# RACE & ETHNICITY

» 9 in 10 visitors to Maine were white



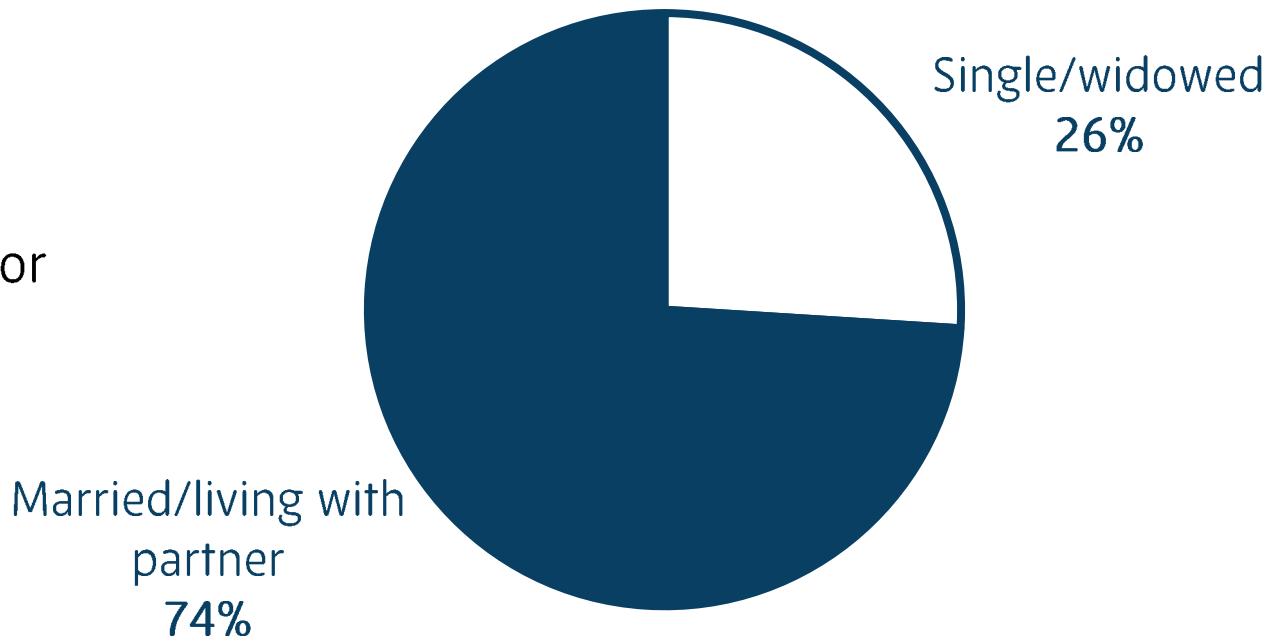
# EDUCATIONAL ATTAINMENT

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



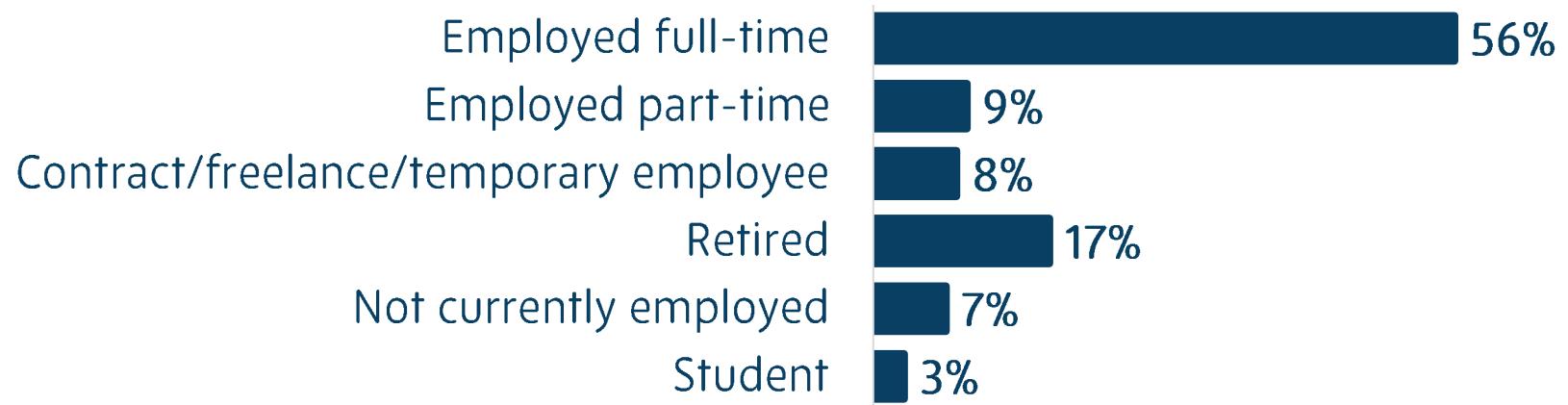
# MARITAL STATUS

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



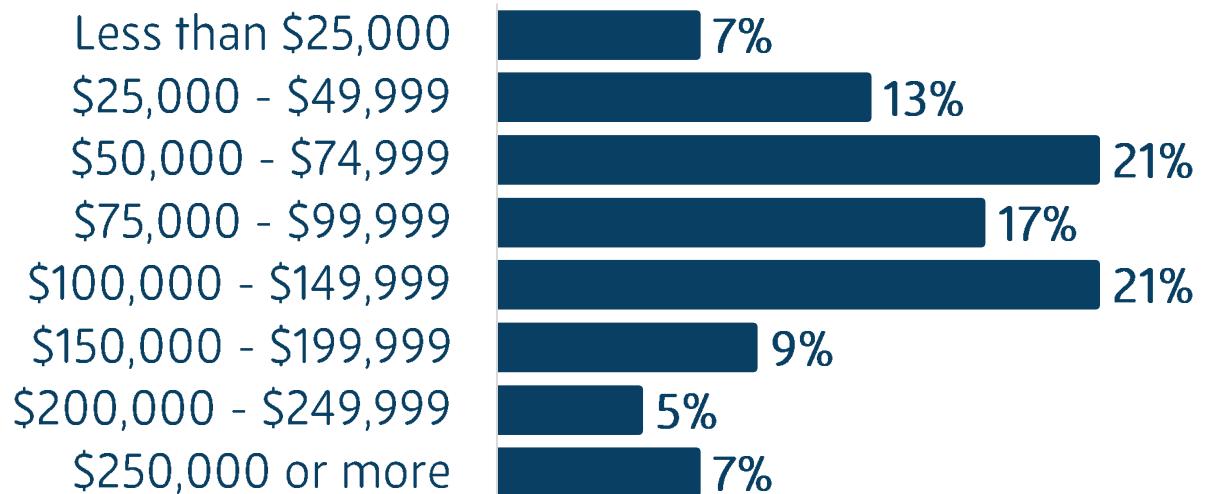
# EMPLOYMENT STATUS

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



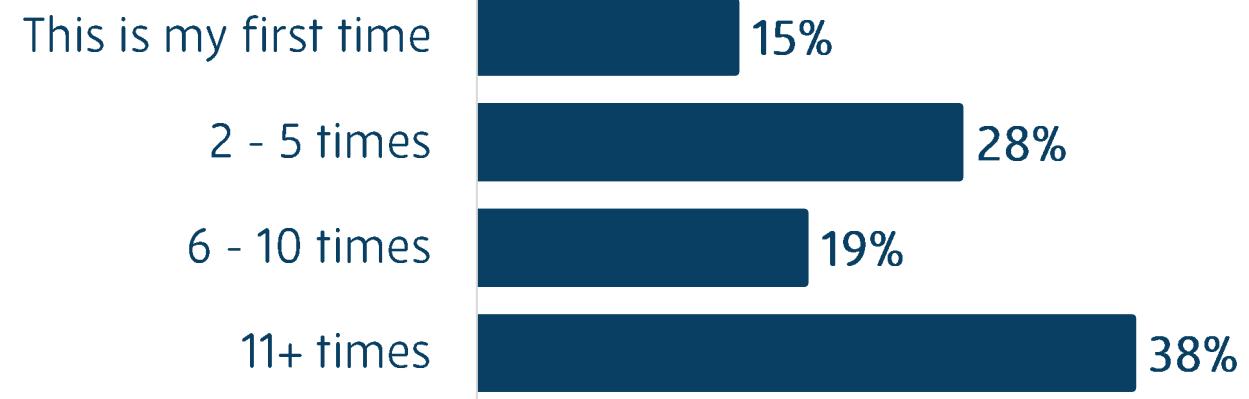
# HOUSEHOLD INCOME

- » The average household income of visitors to Maine is **\$88,200** per year
- » **21%** of visitors to Maine earned more than \$150,000 per year



# NEW & RETURNING VISITORS

- » 15% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 38% had previously traveled in Maine more than 10 times

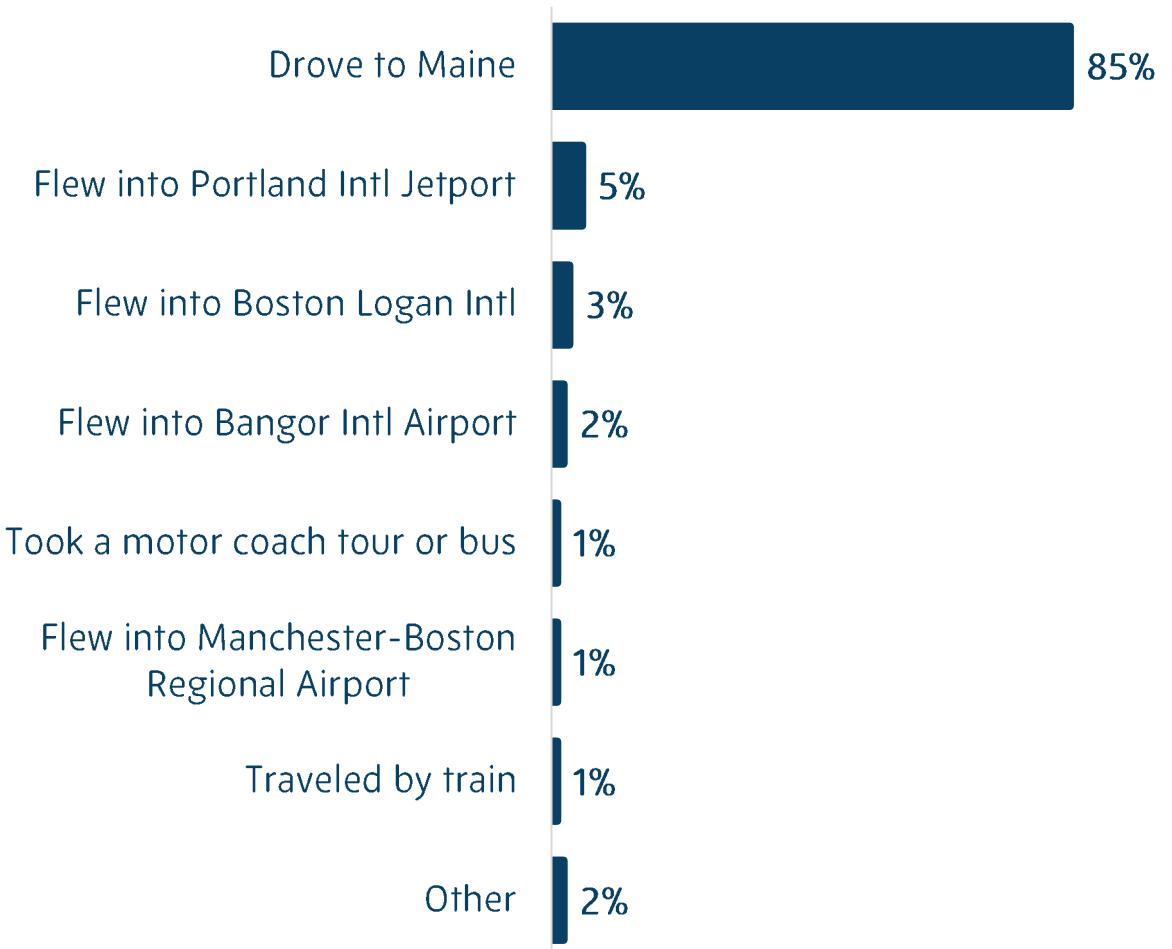


# VISITOR JOURNEY : TRIP EXPERIENCE



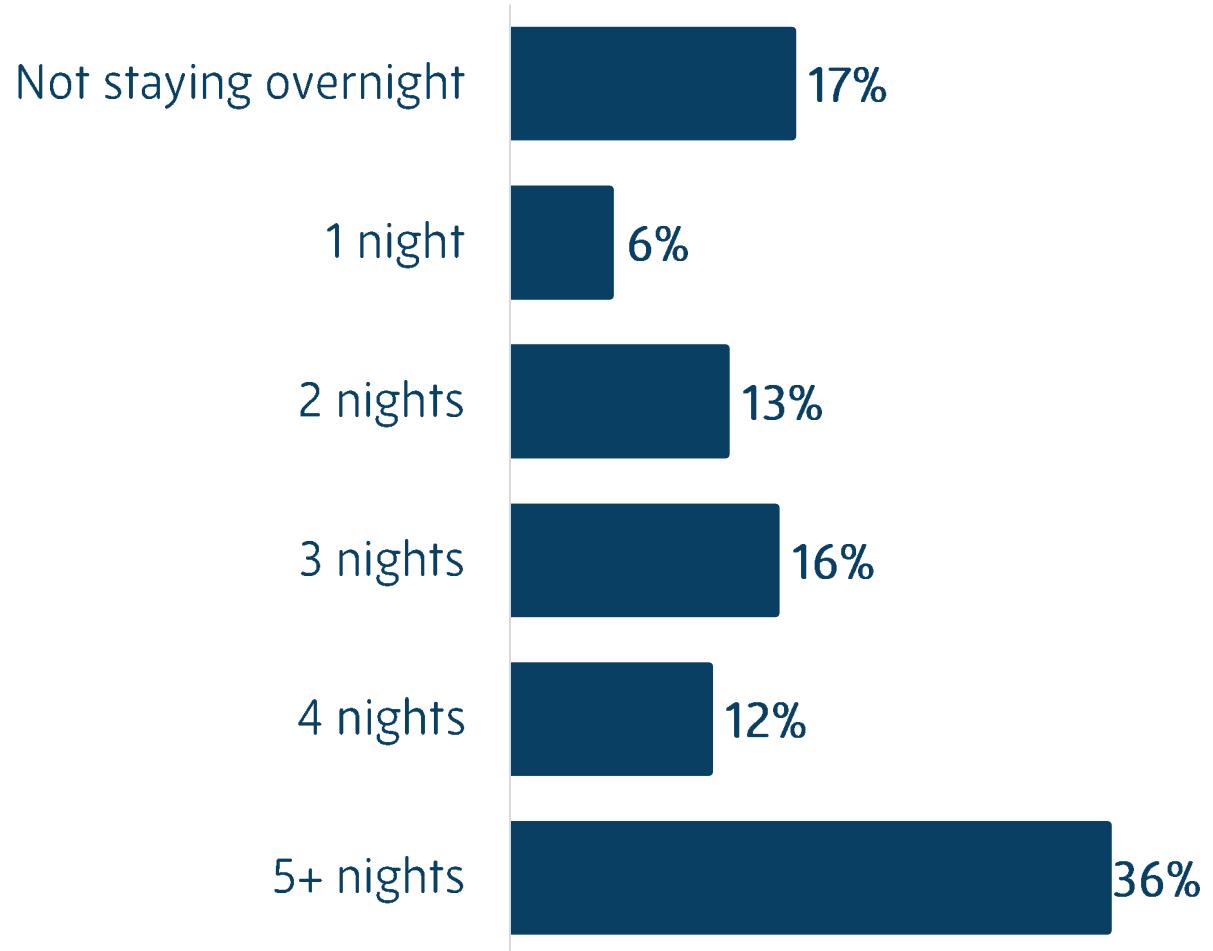
# MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with 85% choosing to travel by car over plane, motor coach/bus, or train



# NIGHTS STAYED

- » 83% of visitors stayed one or more nights in Maine on their trip (+6% points from 2022)
- » Typical visitors stayed 5.3\* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 5.4 nights in Maine on their trips



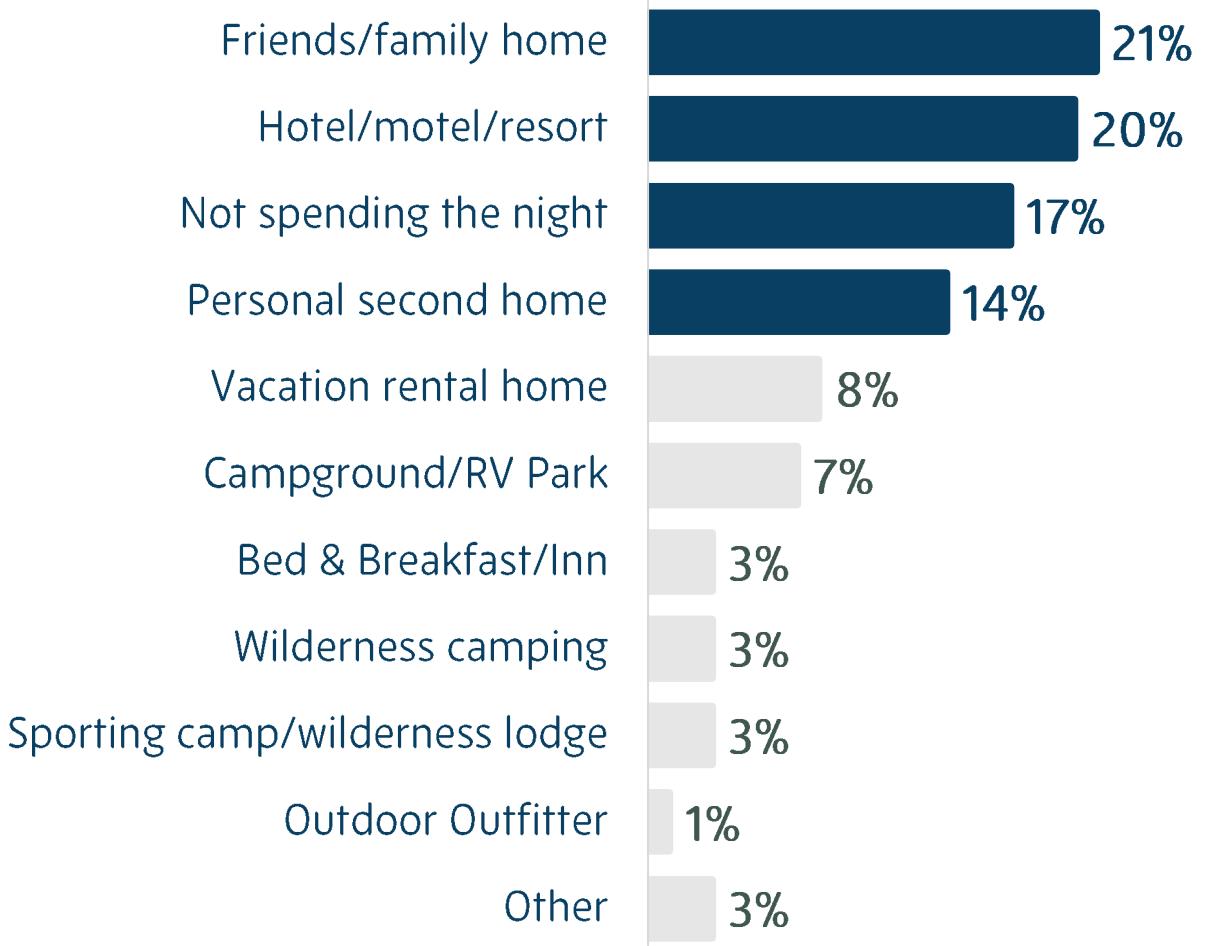
\*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

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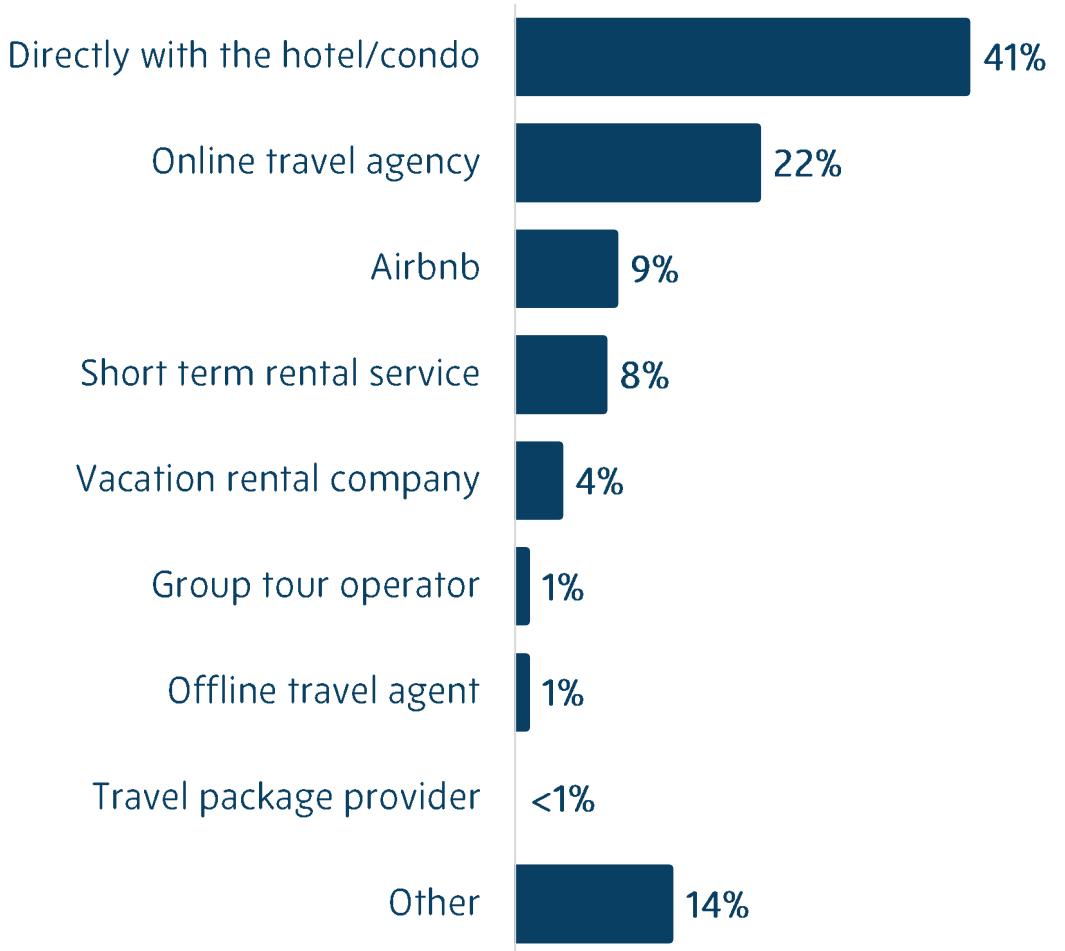
# ACCOMMODATIONS

- » About **1 in 5** visitors stayed with friends/family or in a hotel/motel/resort on their trip to Maine
- » About **1 in 6** visitors stayed in a personal second home or did not spend the night on their trip to Maine



# BOOKING METHODS

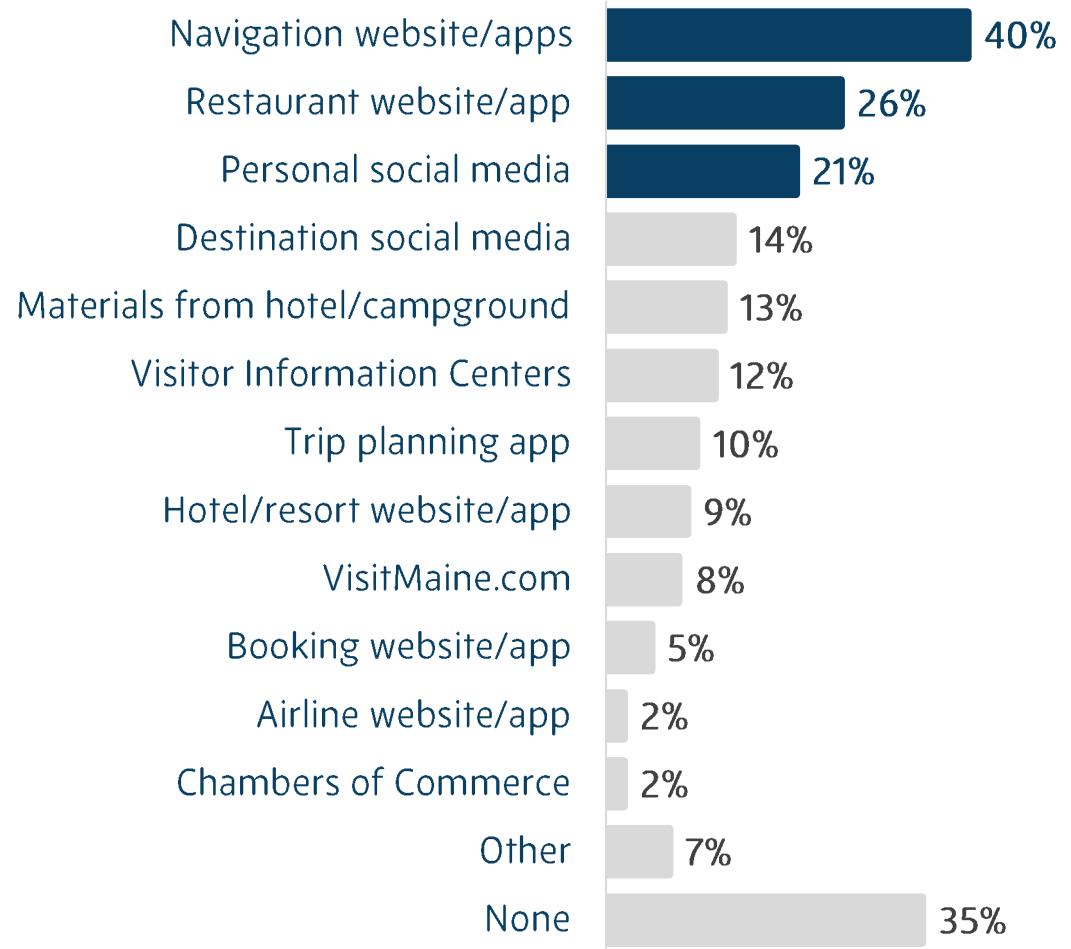
» Over 2 in 5 visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



\*Other includes standing reservations with campground.

# IN-MARKET VISITOR RESOURCES\*

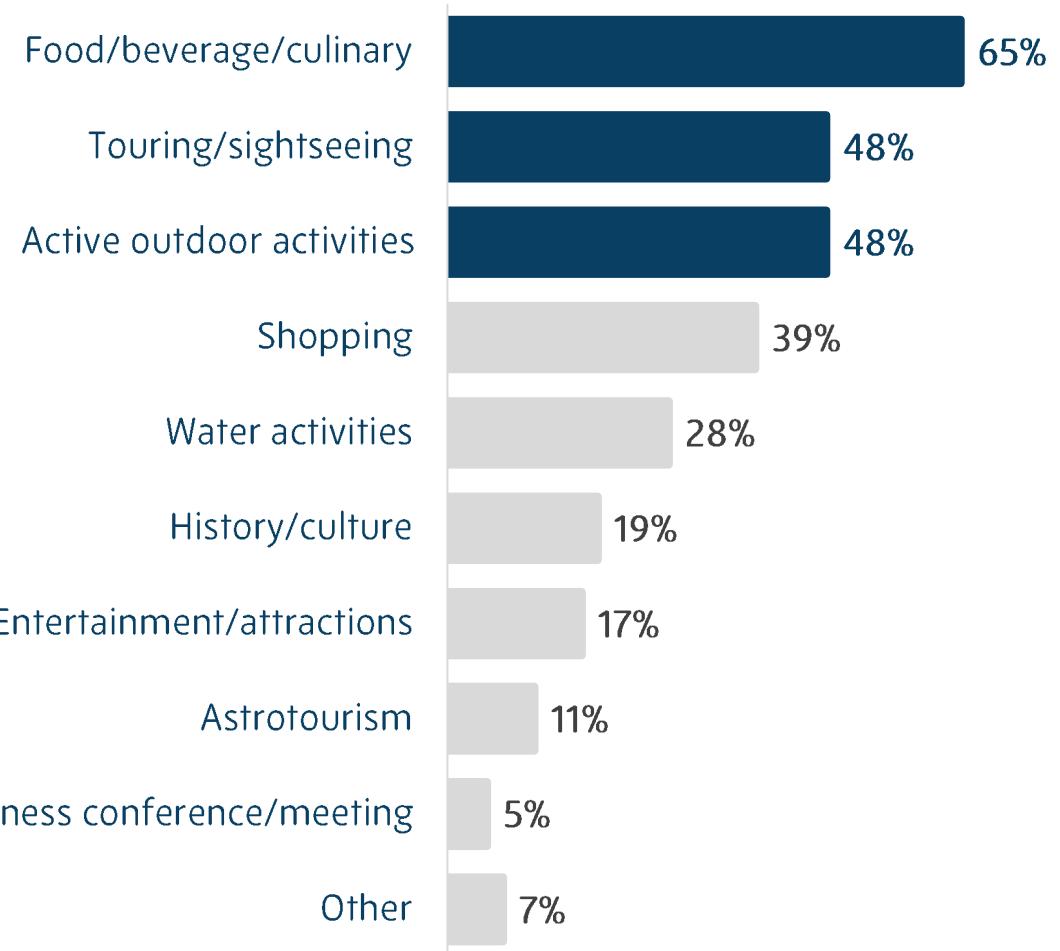
- » Visitors were most likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Over **1 in 4** visitors used restaurant websites or apps to plan activities in-market
- » Over **1 in 3** visitors did not use any resources to plan activities while they were in-market



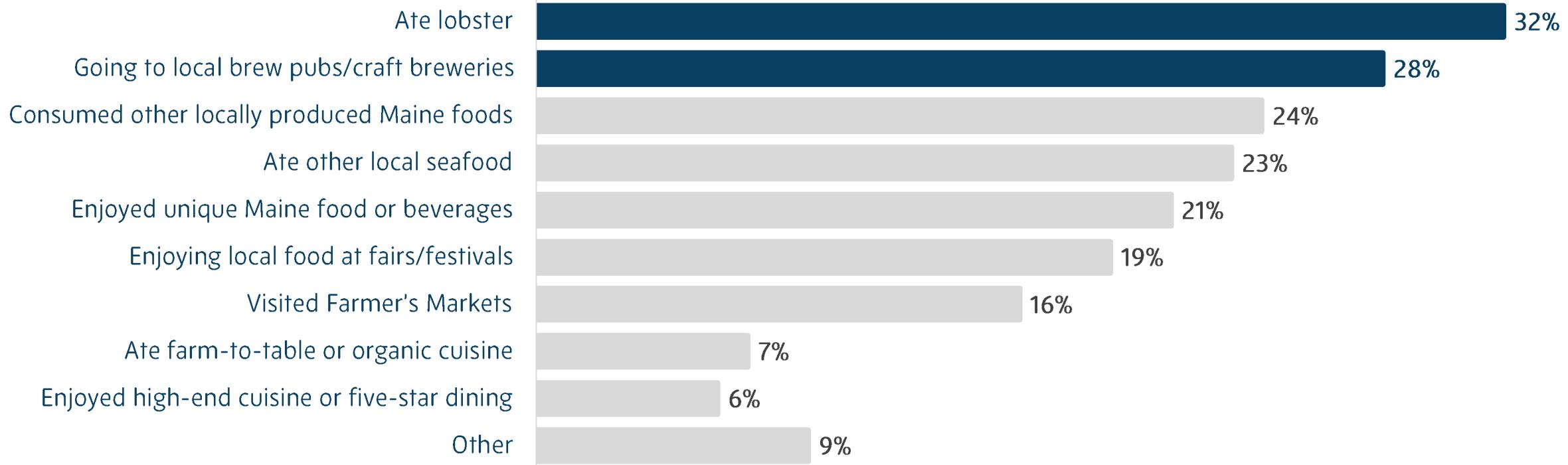
\*Multiple responses permitted.

# VISITOR ACTIVITIES\*

- » Nearly **2 in 3** visitors engaged in food/beverage/culinary activities during their trip to Maine
- » Nearly **half** of visitors engaged in touring/sightseeing or active outdoor activities during their trip to Maine

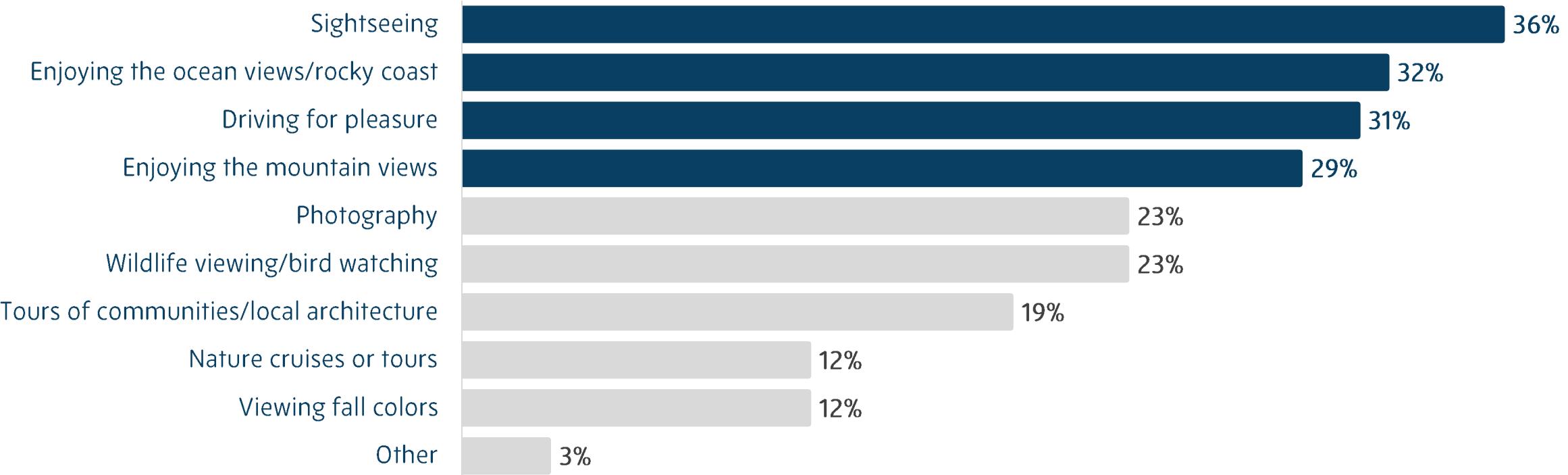


# FOOD & BEVERAGE ACTIVITIES\*

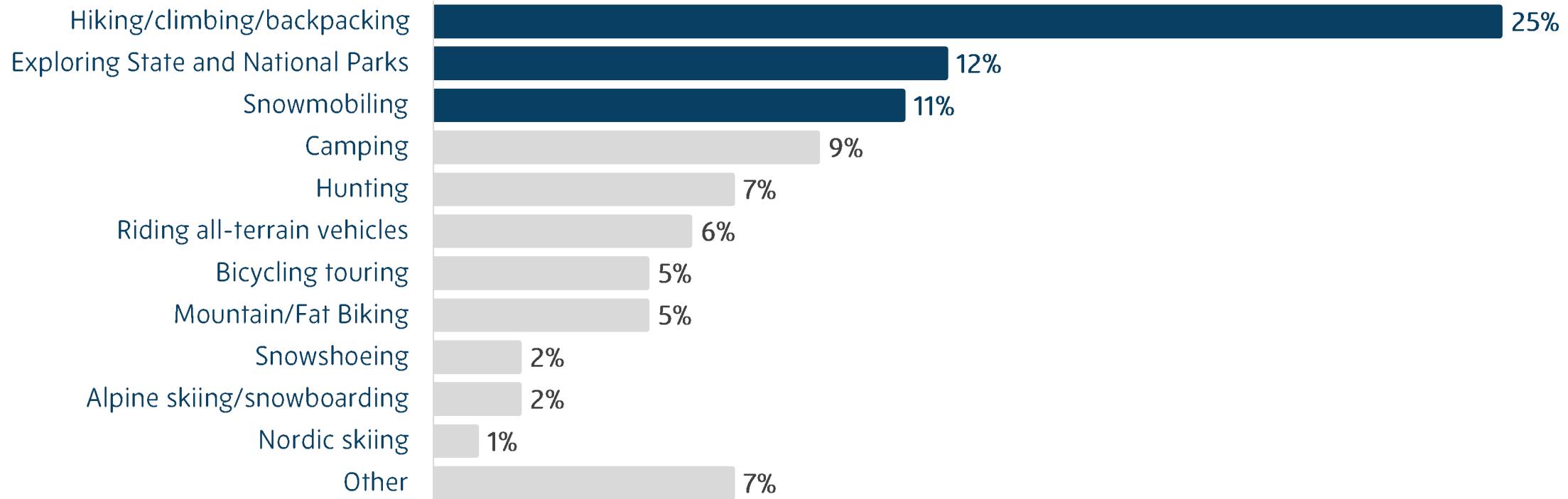


\*Multiple responses permitted.

# TOURING & SIGHTSEEING ACTIVITIES\*



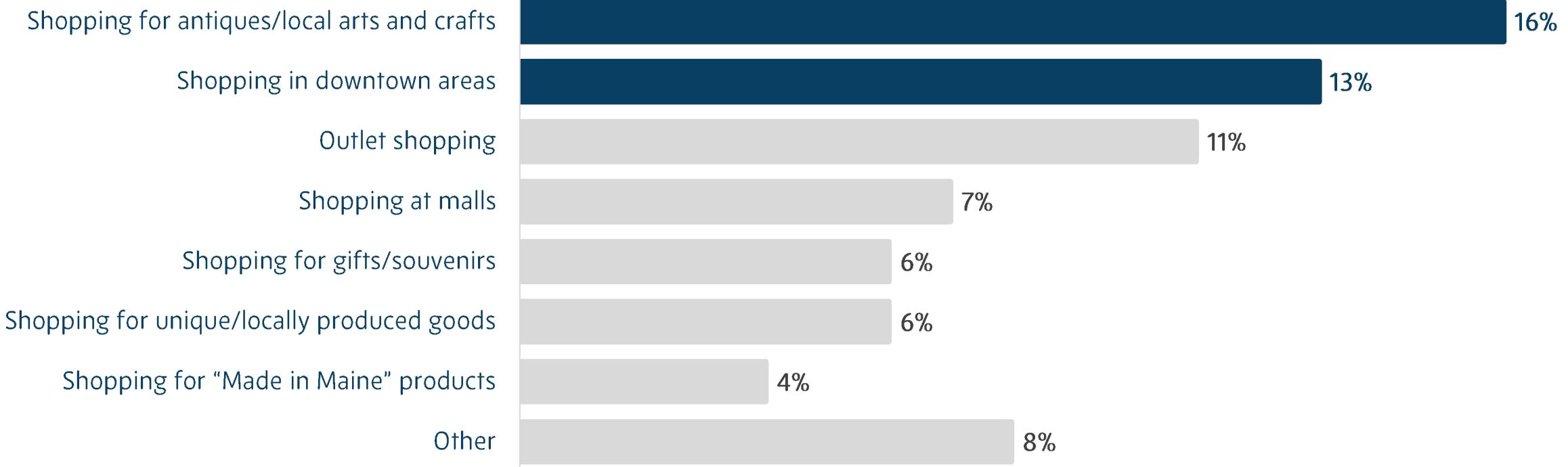
# ACTIVE OUTDOOR ACTIVITIES\*



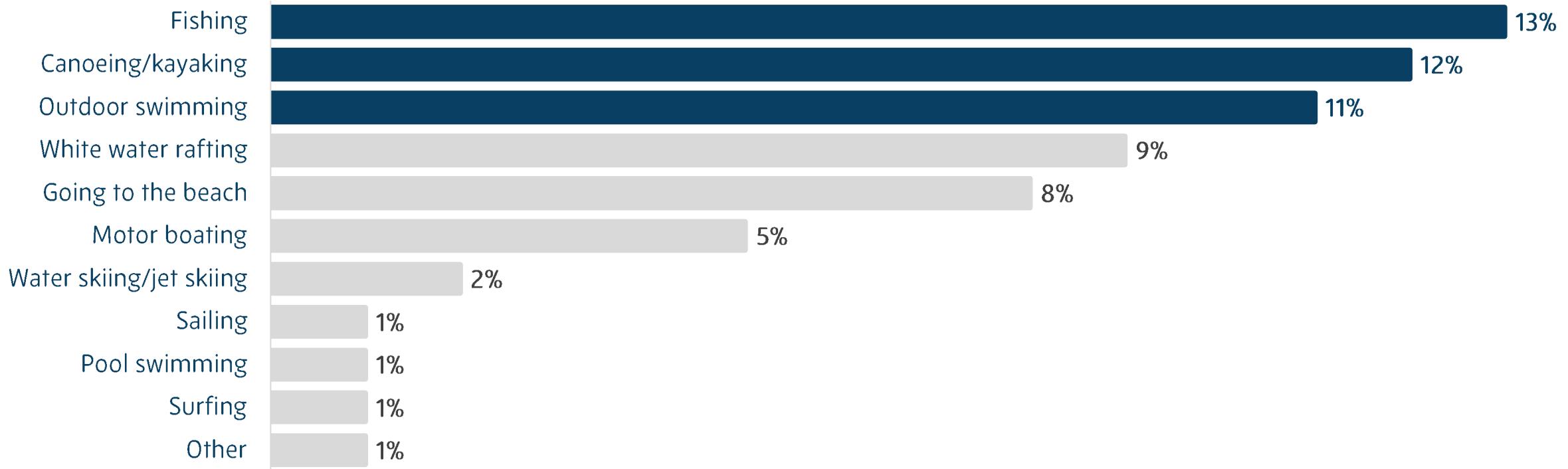
Kennebec Valley

80

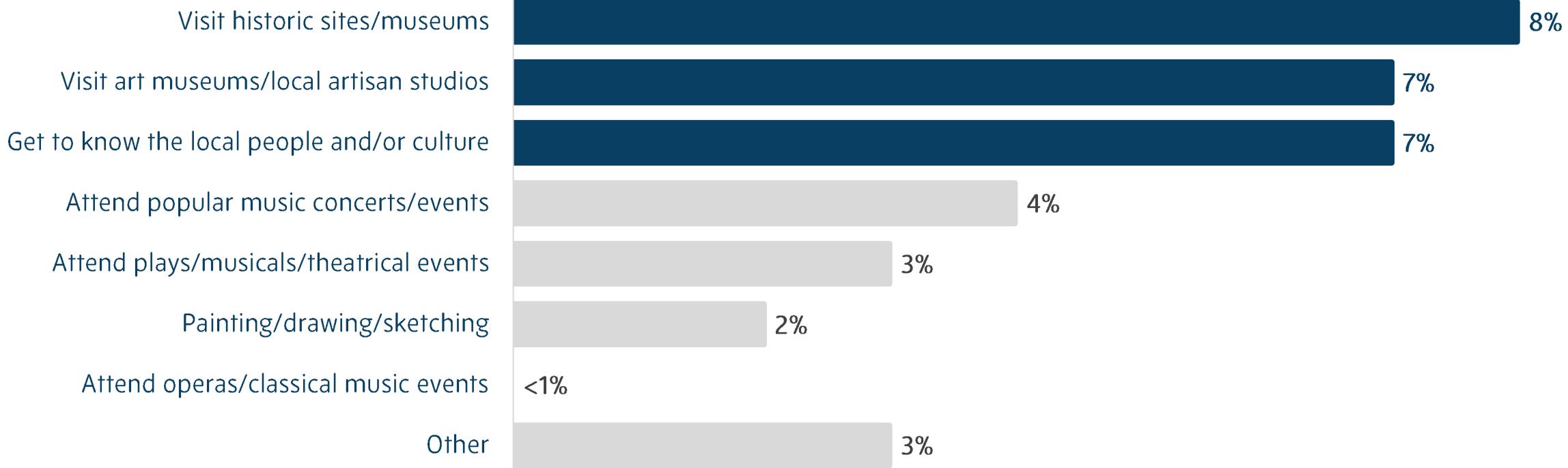
# SHOPPING ACTIVITIES\*



# WATER ACTIVITIES\*



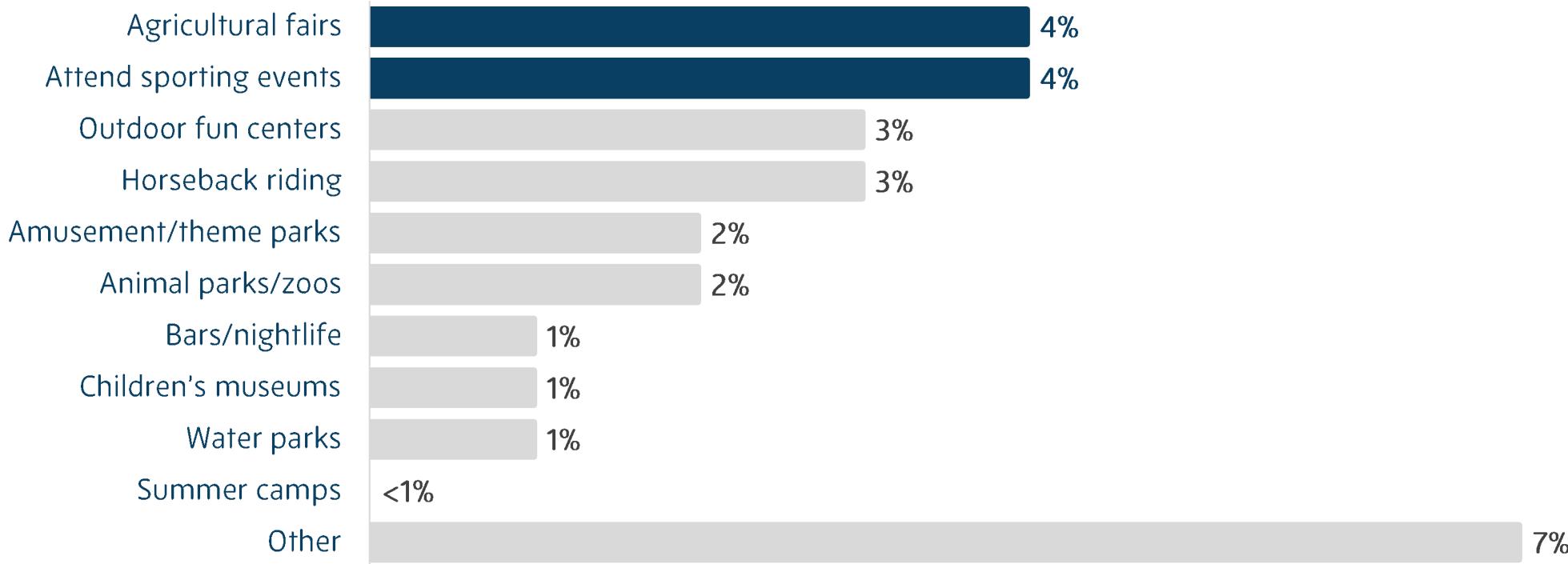
# HISTORICAL & CULTURAL ACTIVITIES\*



Kennebec Valley

83

# ENTERTAINMENT ACTIVITIES\*



Kennebec Valley

84

\*Multiple responses permitted.

**DS**  
downs & st. germain  
RESEARCH

# DAILY TRAVEL PARTY SPENDING

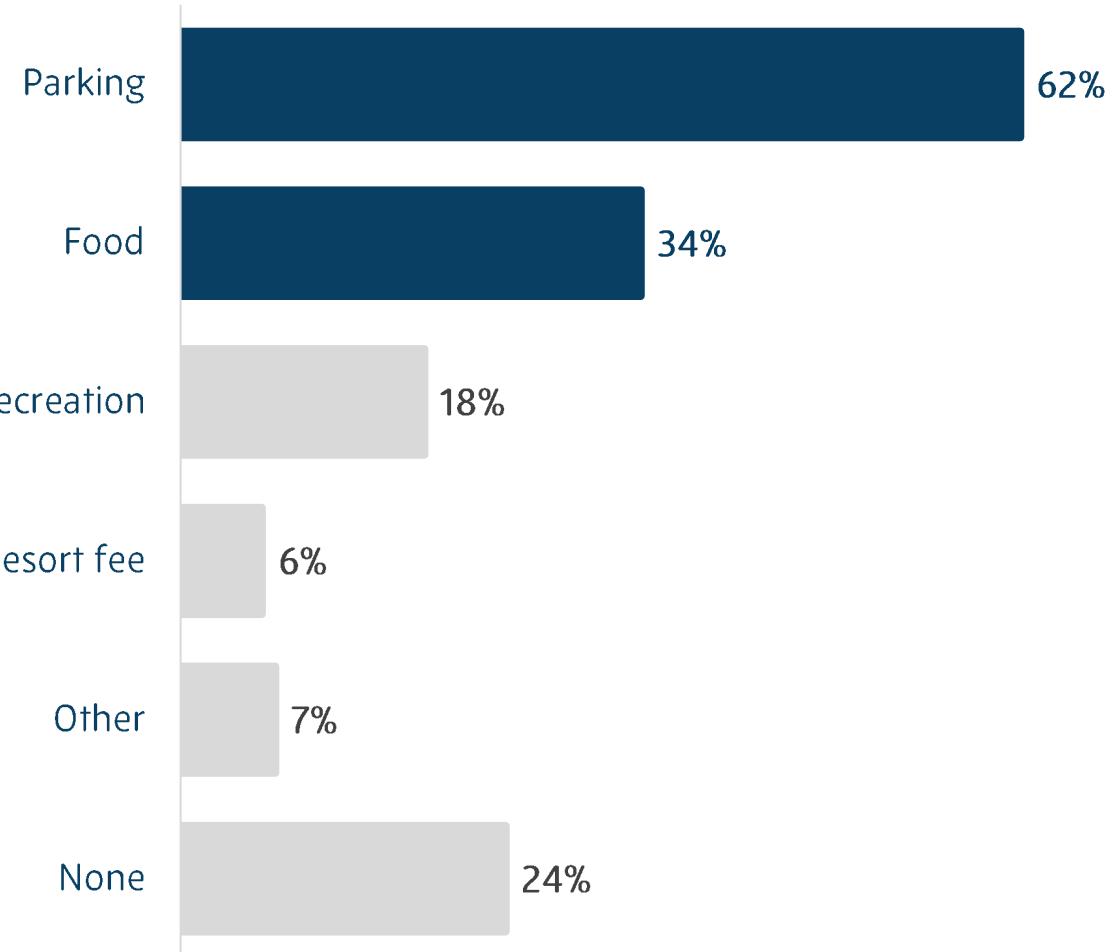
	<b>Paid Lodging</b>	<b>Unpaid Lodging</b>	<b>Day Trippers</b>
Accommodations	\$245	\$0	\$0
Transportation	\$55	\$49	\$37
Groceries	\$41	\$38	\$11
Restaurants	\$103	\$82	\$28
Shopping	\$98	\$67	\$78
Activities & Attractions	\$74	\$69	\$25
Other	\$19	\$25	\$10
<b>Daily Spending</b>	<b>\$635</b>	<b>\$330</b>	<b>\$189</b>

# TOTAL TRAVEL PARTY SPENDING

	<b>Paid Lodging</b>	<b>Unpaid Lodging</b>	<b>Day Trippers</b>
Accommodations	\$1,323	\$0	\$0
Transportation	\$297	\$358	\$37
Groceries	\$221	\$277	\$11
Restaurants	\$556	\$599	\$28
Shopping	\$529	\$489	\$78
Activities & Attractions	\$400	\$504	\$25
Other	\$103	\$183	\$10
<b>Total Spending</b>	<b>\$3,429</b>	<b>\$2,409</b>	<b>\$189</b>

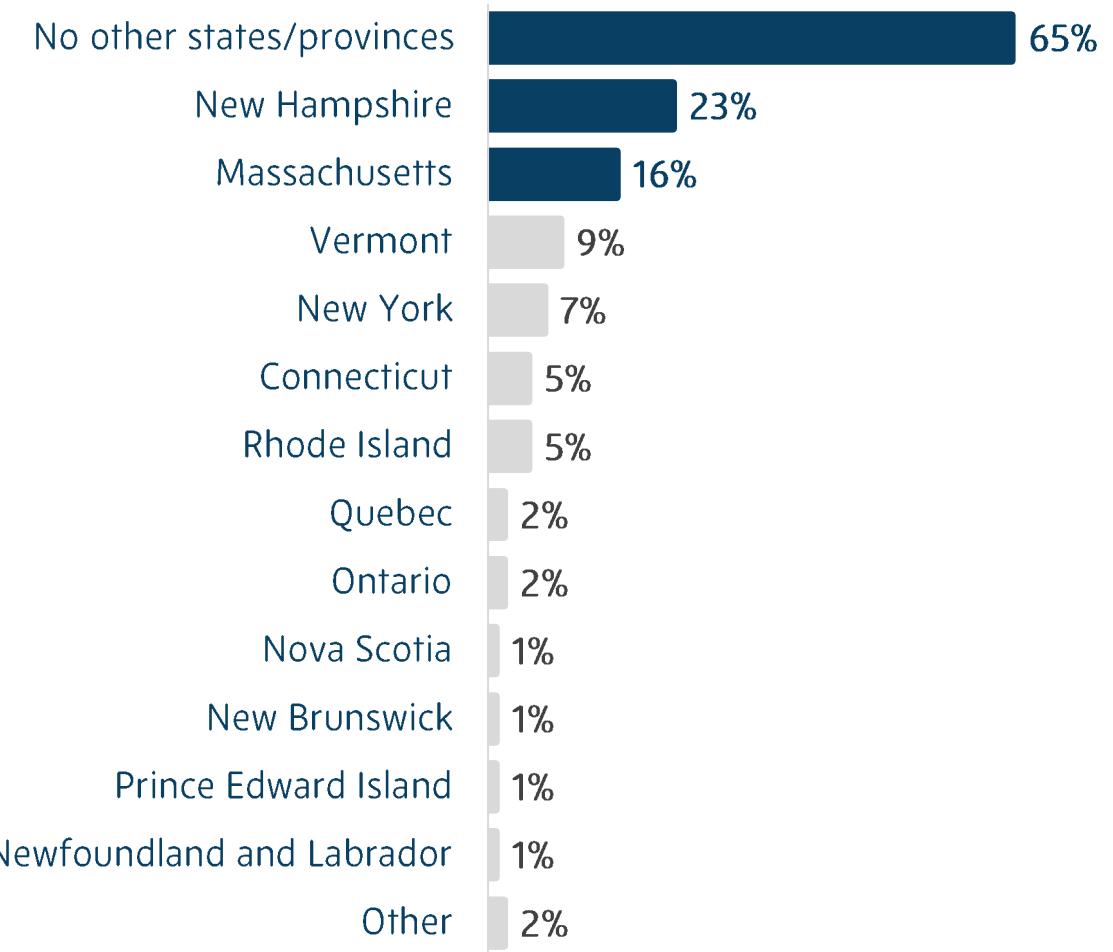
# LODGING AMENITIES\*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for about **3 in 4** visitors
- » Price for accommodations included parking for over **3 in 5** visitors
- » Food was included in accommodations' pricing for about **1 in 3** visitors



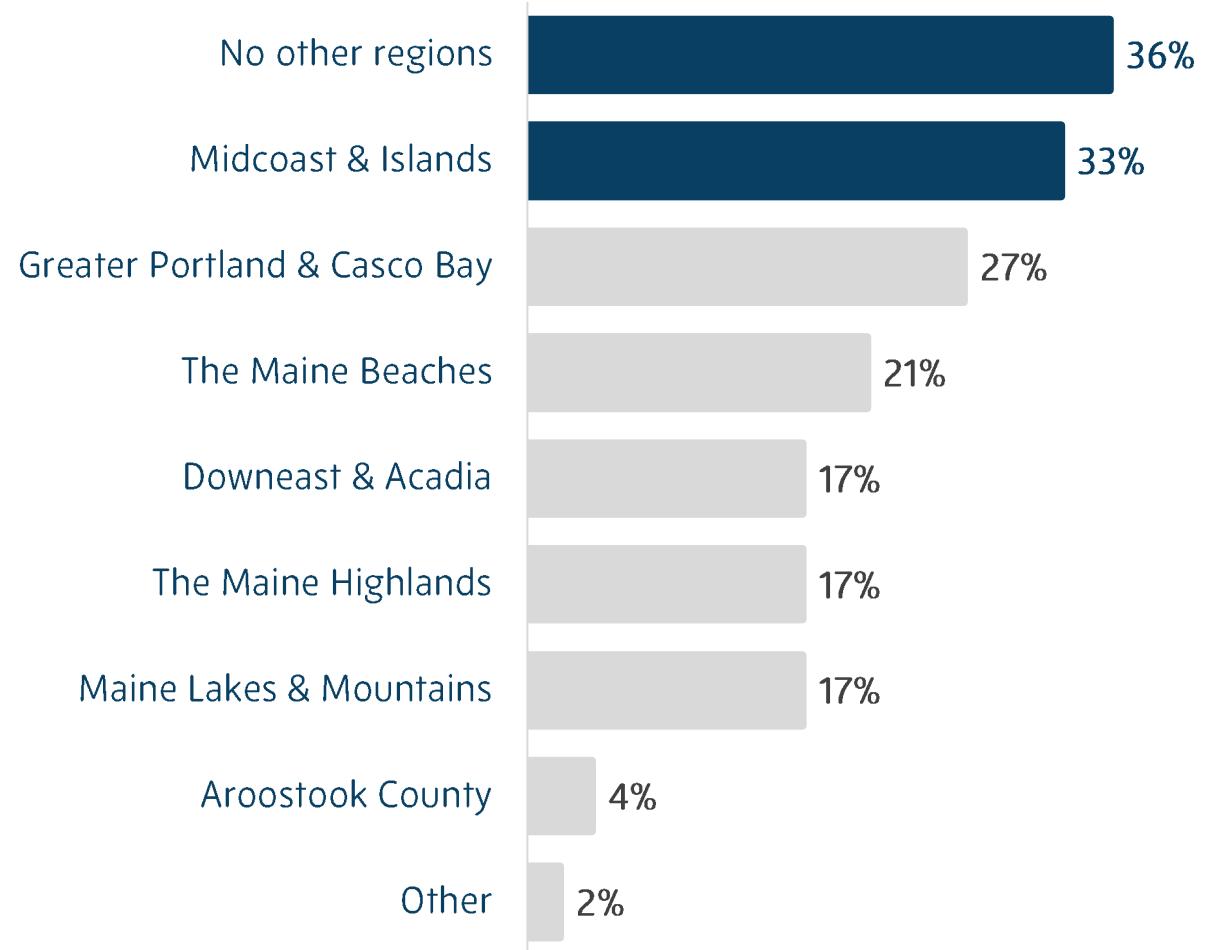
# OTHER STATES & PROVINCES VISITED\*

- » Nearly **2 in 3** visitors did not visit any other U.S. state or Canadian province during their trip
- » About **1 in 4** visitors went to New Hampshire during their trip
- » 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\*

- » Nearly **2 in 5** visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+15% points from 2022)
- » **1 in 3** visitors visited the Midcoast & Islands area in addition to their primary destination within Maine



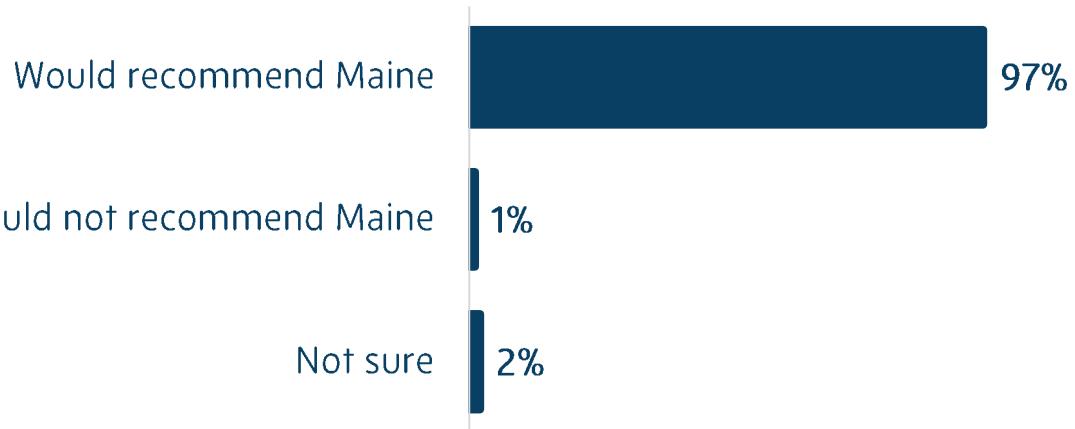
# VISITOR JOURNEY : POST-TRIP EVALUATION



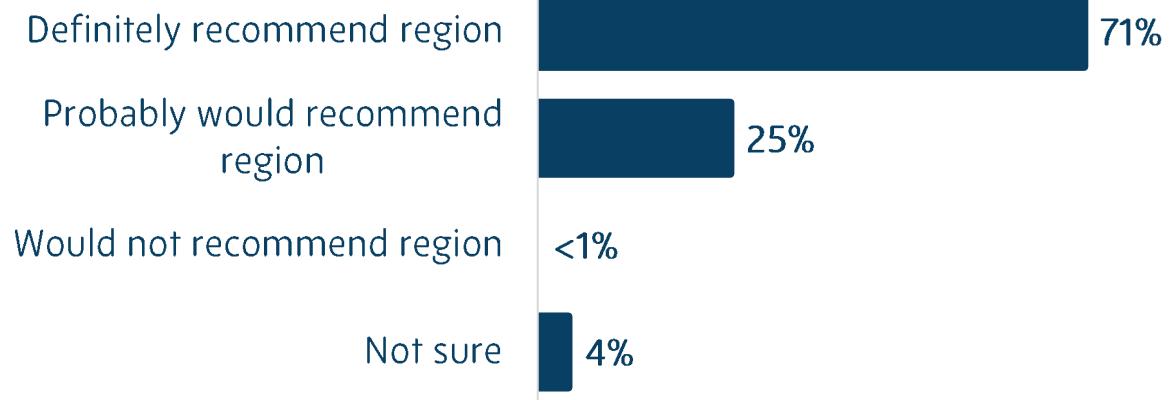
# RECOMMENDING MAINE & ITS REGIONS

- » 97% of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » 96% of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – 71% would definitely recommend

## Likelihood of Recommending Maine



## Likelihood of Recommending Region Visited



# LIKELIHOOD OF RETURNING TO MAINE

» 93% of visitors will return to Maine for a future visit or vacation

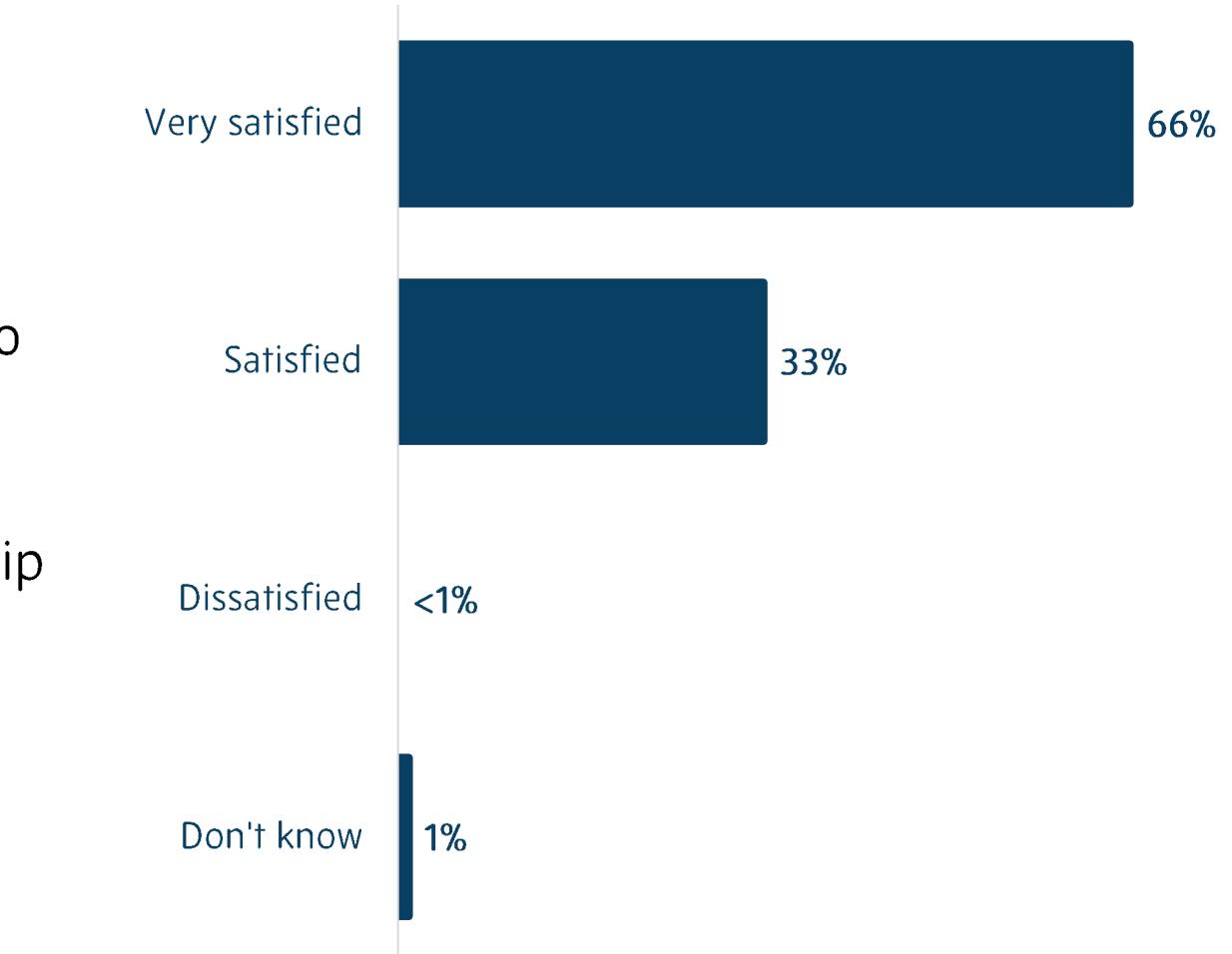


\*7% of all visitors are not sure if they will return to Maine for the following reasons:

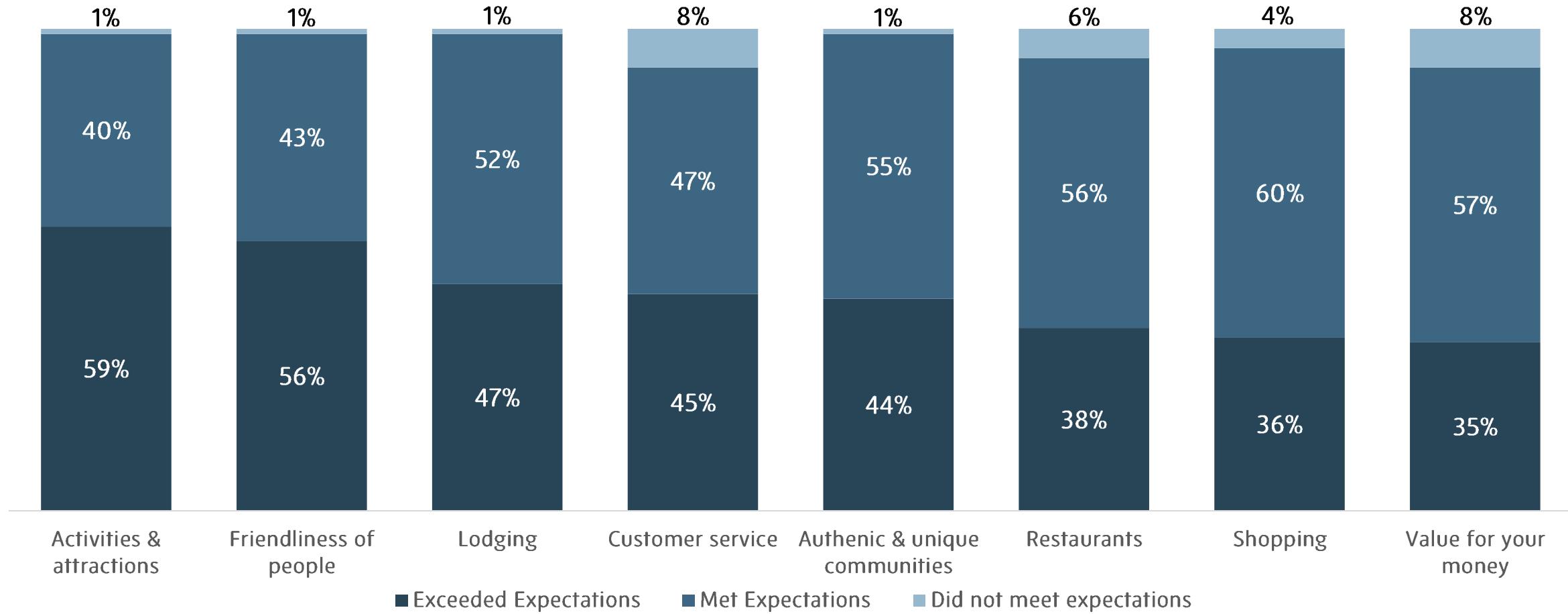
1. Prefer a variety of destinations.

# SATISFACTION

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



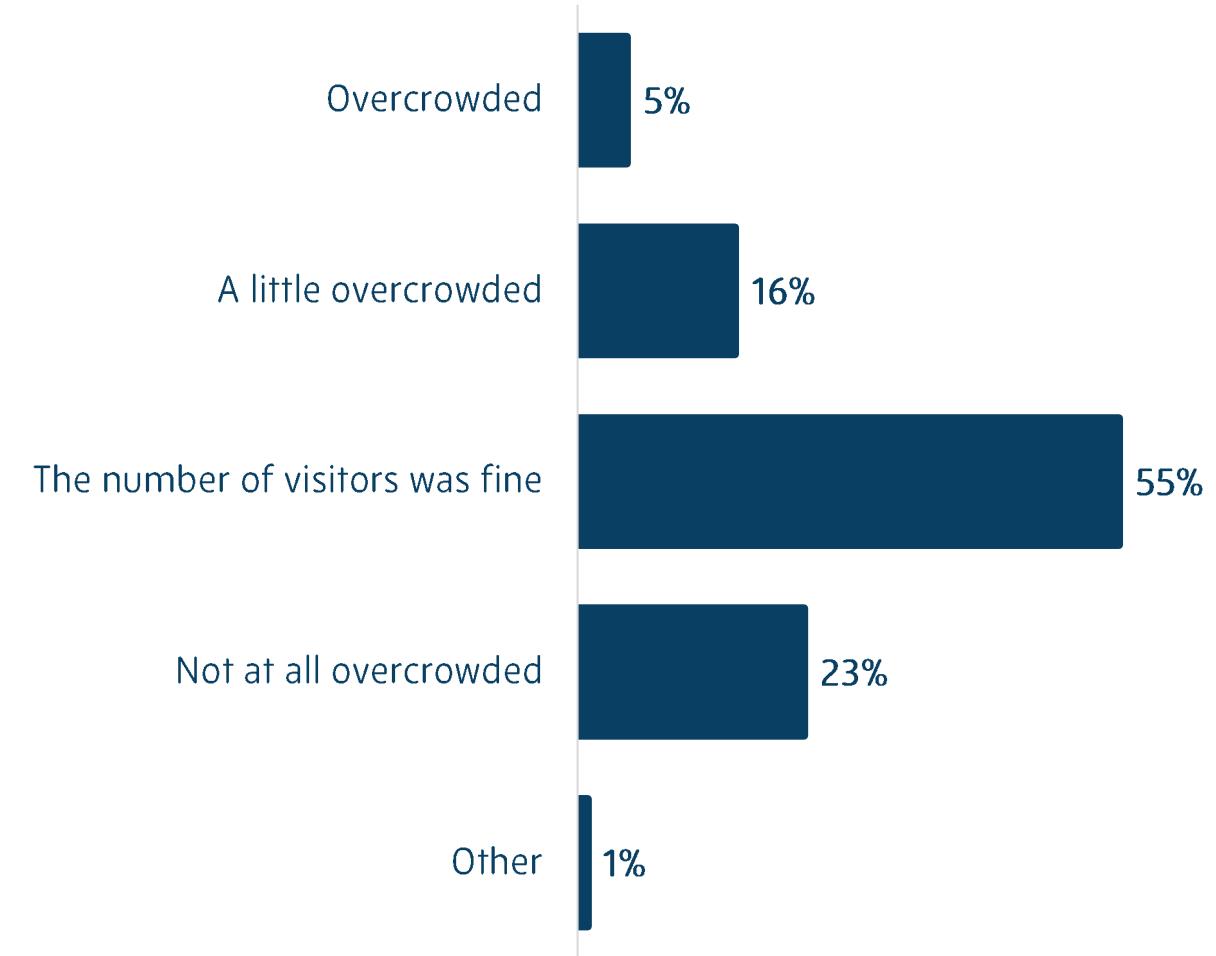
# TRIP RATINGS



# OVERCROWDING

» 55% of visitors thought the number of visitors during their trip to Maine was fine

» 16% of visitors thought it was a little overcrowded



# ANNUAL COMPARISONS



# VISITOR JOURNEY : PRE-VISIT

Pre-Visit

Traveler  
Profile

Trip  
Experience

Post-Trip  
Evaluation

Impact of  
Tourism

# TRIP PLANNING CYCLE

Trip Planning Cycle	2022	2023
A week or less	19%	19%
2 - 3 weeks	14%	13%
1 - 2 months	25%	22%
3 - 4 months	16%	17%
5 - 6 months	10%	12%
7 months - 1 year	9%	11%
More than 1 year	7%	6%
Days in Planning Cycle	50	55
Booking Window	2022	2023
A week or less	26%	25%
2 - 3 weeks	16%	15%
1 - 2 months	24%	24%
3 - 4 months	15%	14%
5 - 6 months	9%	9%
7 months - 1 year	7%	9%
More than 1 year	3%	4%
Days in Booking Window	40	43

# ONLINE TRIP PLANNING SOURCES\*

Online Trip Planning Sources	2022	2023
Online search engines	25%	29%
VisitMaine.com	17%	14%
Facebook	11%	14%
Hotel websites	11%	11%
Visit Maine social media	10%	11%
Online travel agency	9%	11%
Instagram	9%	10%
Traveler reviews/blogs/stories	12%	10%
TripAdvisor	11%	9%
YouTube	6%	8%
Airbnb	9%	7%
VRBO/HomeAway	4%	5%
Airline websites	5%	4%
KennebecValley.org	8%	4%
MaineTourism.com	7%	4%
Vacation rental websites	4%	3%
DiscoverNewEngland.com	3%	3%
MaineLakesandMountains.com	6%	3%
DowneastAcadia.com	5%	2%
MainesMidCoast.com	4%	2%
TheMaineBeaches.com	4%	2%
VisitBarHarbor.com	3%	2%
VisitAroostook.com	2%	1%
TheMaineHighlands.com	2%	1%
VisitPortland.com	2%	1%
Twitter	2%	1%
Other	7%	7%
None	33%	40%

\*Multiple responses permitted.

# OTHER TRIP PLANNING SOURCES\*

Other Trip Planning Sources	2022	2023
Advice from friends/family	40%	37%
Articles or travelogues	16%	17%
AAA	12%	11%
Travel guides/brochures	10%	8%
Travel planning apps	9%	8%
Travel books & magazines	8%	5%
Called the Maine Office of Tourism	6%	3%
Visitor Guide	5%	3%
Called local Chambers of Commerce	2%	2%
Visit Maine e-newsletter	4%	2%
Called local convention and visitors bureaus	3%	1%
Called another Maine Tourism/Lodging Association	2%	1%
Travel agent	2%	1%
Other	6%	4%
None	38%	45%

# REASON FOR VISITING\*

Reasons for Visiting	2022	2023
Visiting friends/relatives	28%	33%
Relax and unwind	27%	28%
Sightseeing/touring	29%	27%
Nature & bird watching	22%	19%
Active outdoor activities	11%	13%
Water activities	10%	11%
Special occasion	12%	10%
Special event	8%	10%
Shopping	8%	9%
Snow activities	9%	8%
Sporting event	2%	7%
Attractions	7%	5%
Conference/meeting	5%	5%
Beach	4%	3%
Culture/museums/history	3%	3%
Astrotourism	1%	1%
Other	10%	11%

\*Multiple responses permitted.

# TV SHOWS & FILM\*

Trip Inspiration From Film	2022	2023
Yes	NA	11%
No	NA	89%
Don't know	NA	<1%
How Film Inspired Trip**	2022	2023
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	NA	62%
Seeing Maine in a film or TV show made me think about Maine as a place to visit	NA	23%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	NA	9%
Visiting a location related to a TV show or film was the main reason I visited Maine	NA	4%
Something else	NA	2%
Visited TV or Film Attractions***	2022	2023
Yes	NA	15%
No	NA	83%
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	62%	62%
New Hampshire	21%	23%
Massachusetts	13%	14%
Vermont	15%	14%
New York	10%	7%
Connecticut	5%	6%
Rhode Island	5%	6%
New Brunswick	2%	3%
Nova Scotia	3%	3%
Quebec	3%	2%
Newfoundland and Labrador	2%	1%
Ontario	3%	1%
Prince Edward Island	2%	1%
Other	3%	2%

# ADVERTISING/PROMOTIONS

Recalled Advertising	2022	2023
Yes	48%	46%
No	34%	37%
Not sure	18%	17%
Influenced by Advertising	2022	2023
Yes	25%	25%

# ADVERTISING/PROMOTIONS\*

Sources of Advertising Noticed*	2022	2023
Social media	45%	55%
Internet	43%	41%
Magazine	22%	24%
Cable or satellite television	17%	20%
AAA	13%	17%
VisitMaine.com	11%	16%
Traveler reviews/blogs	14%	14%
Online streaming service	7%	13%
Radio	20%	13%
Newspaper	13%	10%
Maine travel/visitor guide	10%	6%
Brochure	9%	5%
Music/podcast streaming	6%	5%
Deal-based promotion	3%	2%
Billboard	5%	2%
Other	10%	7%
Not sure	1%	2%

\*Multiple responses permitted.

# VISITOR JOURNEY : TRAVELER PROFILE



# ORIGIN REGION

Region of Origin	2022	2023
Maine	29%	25%
New England	26%	30%
Mid-Atlantic	19%	17%
Southeast	8%	9%
Southwest	2%	2%
Midwest	6%	6%
West	4%	4%
Canada	5%	6%
International	1%	1%

# ORIGIN STATE/PROVINCE

Origin States & Provinces	2022	2023
Maine	29%	25%
Massachusetts	13%	16%
New Hampshire	5%	6%
New York	7%	6%
Connecticut	4%	4%
Florida	4%	4%
New Jersey	3%	4%
Pennsylvania	5%	3%
Quebec	2%	3%
Maryland	2%	2%
Ohio	2%	2%
Rhode Island	2%	2%
Virginia	1%	2%
Ontario	2%	2%

# ORIGIN MARKET

Origin Markets	2022	2023
Boston	7%	10%
New York City <sup>1</sup>	7%	7%
Washington DC - Baltimore <sup>2</sup>	3%	4%
Waterville	5%	4%
Portland	3%	3%
Augusta	3%	3%
Philadelphia	3%	2%
Providence, RI	2%	2%
Quebec City, CAN	1%	1%

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

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

# TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2022	2023
As a couple	40%	40%
As a family	22%	22%
With other couples/friends	17%	18%
Traveled alone	19%	17%
With business associates	2%	2%
In a tour group	<1%	<1%
Other	<1%	1%
Average Travel Party Size	2.9	3.1

# TRAVEL WITH CHILDREN\*

## Children in Travel Party\*

2022

2023

No children	84%	82%
Children younger than 6	6%	5%
Children 6 – 12	9%	8%
Children 13 – 17	9%	10%

## Gender

2022

2023

Male	49%	47%
Female	51%	53%

# DEMOGRAPHIC PROFILE

Age	2022	2023
Under 25	10%	8%
25 – 34	18%	14%
35 – 44	21%	22%
45 – 54	19%	21%
55 – 65	21%	22%
Over 65	11%	13%
Median Age	46	48
Race/Ethnicity	2022	2023
White	90%	90%
Hispanic	2%	3%
Black	3%	2%
Asian	2%	2%
Indigenous	1%	1%
Other	2%	2%

# LIFESTYLE PROFILE

Marital Status	2022	2023
Single/widowed	31%	26%
Married/living with partner	69%	74%
Employment Status	2022	2023
Employed full-time	52%	56%
Employed part-time	10%	9%
Contract/freelance/temporary employee	8%	8%
Retired	17%	17%
Not currently employed	9%	7%
Student	4%	3%

# LIFESTYLE PROFILE

Household Income	2022	2023
Less than \$25,000	8%	7%
\$25,000 - \$49,999	14%	13%
\$50,000 - \$74,999	20%	21%
\$75,000 - \$99,999	21%	17%
\$100,000 - \$149,999	20%	21%
\$150,000 - \$199,999	10%	9%
\$200,000 - \$249,999	3%	5%
\$250,000 or more	4%	7%
Median Household Income	\$84,500	\$88,200

# LIFESTYLE PROFILE

Educational Attainment	2022	2023
High school or less	11%	12%
Some college or technical school	16%	18%
College or technical school graduate	52%	49%
Graduate school	21%	21%

# NEW & RETURNING VISITORS

## Previous Trips to Maine

2022

2023

This is my first time	18%	15%
2 - 5 times	32%	28%
6 - 10 times	18%	19%
11+ times	32%	38%

# VISITOR JOURNEY : TRIP EXPERIENCE



# TRANSPORTATION

Means of Transportation	2022	2023
Drove to Maine	83%	85%
Flew into Portland Intl Jetport	5%	5%
Flew into Boston Logan Intl	3%	3%
Flew into Bangor Intl Airport	3%	2%
Flew into Manchester-Boston Regional Airport	<1%	1%
Took a motor coach tour or bus	2%	1%
Traveled by train	<1%	1%
Other	2%	2%

# LENGTH OF STAY

Nights Stayed	2022	2023
Not staying overnight	23%	17%
1 night	6%	6%
2 nights	10%	13%
3 nights	14%	16%
4 nights	10%	12%
5+ nights	37%	36%
Average Length of Stay	5.0	5.3

# ACCOMMODATIONS

Accommodations	2022	2023
Friends/family home	22%	21%
Hotel/motel/resort	16%	20%
Not spending the night	23%	17%
Personal second home	12%	14%
Vacation rental home	7%	8%
Campground/RV Park	7%	7%
Bed & Breakfast/Inn	2%	3%
Wilderness camping	4%	3%
Sporting camp/wilderness lodge	4%	3%
Outdoor Outfitter	1%	1%
Other	2%	3%

# BOOKING

Booking Methods	2022	2023
Directly with the hotel/condo	36%	41%
Online travel agency	21%	22%
Airbnb	11%	9%
Short term rental service	6%	8%
Vacation rental company	4%	4%
Offline travel agent	2%	1%
Group tour operator	1%	1%
Travel package provider	1%	<1%
Other	18%	14%

# IN-MARKET RESOURCES\*

In-Market Resources	2022	2023
Navigation website/apps	42%	40%
Restaurant website/app	24%	26%
Personal social media	21%	21%
Destination social media	12%	14%
Materials from hotel/campground	13%	13%
Visitor Information Centers	15%	12%
Trip planning app	10%	10%
Hotel/resort website/app	9%	9%
VisitMaine.com	10%	8%
Booking website/app	7%	5%
Airline website/app	3%	2%
Chambers of Commerce	2%	2%
Other	4%	7%
None	29%	35%

# ACTIVITIES\*

Activities	2022	2023
Food/beverage/culinary	64%	65%
Touring/sightseeing	51%	48%
Active outdoor activities	46%	48%
Shopping	36%	39%
Water activities	27%	28%
History/culture	17%	19%
Entertainment/attractions	19%	17%
Astrotourism	13%	11%
Business conference/meeting	5%	5%
Other	8%	7%

# FOOD & BEVERAGE ACTIVITIES\*

Food & Beverage Activities	2022	2023
Ate lobster	31%	32%
Going to local brew pubs/craft breweries	34%	28%
Consumed other locally produced Maine foods	29%	24%
Ate other local seafood	25%	23%
Enjoyed unique Maine food or beverages	26%	21%
Enjoying local food at fairs/festivals	20%	19%
Visited Farmer's Markets	16%	16%
Ate farm-to-table or organic cuisine	7%	7%
Enjoyed high-end cuisine or five-star dining	12%	6%
Other	6%	9%

# TOURING & SIGHTSEEING ACTIVITIES\*

Touring & Sightseeing Activities	2022	2023
Sightseeing	38%	36%
Enjoying the ocean views/rocky coast	32%	32%
Driving for pleasure	34%	31%
Enjoying the mountain views	31%	29%
Wildlife viewing/bird watching	24%	23%
Photography	22%	23%
Tours of communities/local architecture	17%	19%
Viewing fall colors	17%	12%
Nature cruises or tours	17%	12%
Other	3%	3%

# ACTIVE OUTDOOR ACTIVITIES\*

Active Outdoor Activities	2022	2023
Hiking/climbing/backpacking	30%	25%
Exploring State and National Parks	16%	12%
Snowmobiling	11%	11%
Camping	12%	9%
Hunting	6%	7%
Riding all-terrain vehicles	6%	6%
Bicycling touring	8%	5%
Mountain/Fat Biking	7%	5%
Alpine skiing/snowboarding	4%	2%
Snowshoeing	2%	2%
Nordic skiing	1%	1%
Other	5%	7%

# SHOPPING ACTIVITIES\*

Shopping Activities	2022	2023
Shopping for antiques/local arts and crafts	9%	16%
Shopping in downtown areas	10%	13%
Outlet shopping	14%	11%
Shopping at malls	14%	7%
Shopping for gifts/souvenirs	10%	6%
Shopping for unique/locally produced goods	7%	6%
Shopping for "Made in Maine" products	7%	4%
Other	1%	8%

\*Multiple responses permitted.

# WATER ACTIVITIES\*

Water Activities	2022	2023
Fishing	16%	13%
Canoeing/kayaking	13%	12%
Outdoor swimming	9%	11%
White water rafting	9%	9%
Going to the beach	10%	8%
Motor boating	7%	5%
Water skiing/jet skiing	3%	2%
Pool swimming	3%	1%
Sailing	2%	1%
Surfing	1%	1%
Other	1%	1%

# HISTORY/CULTURE ACTIVITIES\*

History/Culture Activities	2022	2023
Visit historic sites/museums	9%	8%
Visit art museums/local artisan studios	4%	7%
Get to know the local people and/or culture	4%	7%
Attend popular music concerts/events	5%	4%
Attend plays/musicals/theatrical events	1%	3%
Painting/drawing/sketching	3%	2%
Attend operas/classical music events	<1%	<1%
Other	1%	3%

\*Multiple responses permitted.

# ENTERTAINMENT ACTIVITIES\*

Entertainment Activities	2022	2023
Agricultural fairs	8%	4%
Attend sporting events	2%	4%
Outdoor fun centers	1%	3%
Horseback riding	1%	3%
Amusement/theme parks	1%	2%
Animal parks/zoo	2%	2%
Children's museums	1%	1%
Water parks	2%	1%
Bars/nightlife	3%	1%
Summer camps	1%	<1%
Other	5%	7%

# OTHER STATES/PROVINCES VISITED\*

Other States/Provinces Visited	2022	2023
No other states/provinces	62%	65%
New Hampshire	24%	23%
Massachusetts	18%	16%
Vermont	11%	9%
New York	10%	7%
Connecticut	5%	5%
Rhode Island	4%	5%
Ontario	3%	2%
Quebec	2%	2%
New Brunswick	2%	1%
Newfoundland and Labrador	1%	1%
Nova Scotia	2%	1%
Prince Edward Island	2%	1%
Other	2%	2%

\*Multiple responses permitted.

# TRAVELING IN MAINE\*

Maine Regions Visited	2022	2023
No other regions	21%	36%
Midcoast & Islands	32%	33%
Greater Portland & Casco Bay	28%	27%
The Maine Beaches	27%	21%
The Maine Highlands	26%	17%
Maine Lakes & Mountains	25%	17%
Downeast & Acadia	23%	17%
Aroostook County	9%	4%
Other	1%	2%

# VISITOR JOURNEY : POST-TRIP EVALUATION



# RECOMMENDING MAINE/REGION OF TRAVEL

<b>Recommending Maine</b>	<b>2022</b>	<b>2023</b>
Would recommend Maine	97%	97%
Would not recommend Maine	1%	1%
Not sure	2%	2%

<b>Recommending Regions</b>	<b>2022</b>	<b>2023</b>
Definitely recommend region	74%	71%
Probably would recommend region	22%	25%
Would not recommend region	<1%	<1%
Not sure	4%	4%

# RETURNING TO MAINE

## Returning to Maine

2022

2023

Definitely will return	76%	75%
Probably will return	17%	18%
Probably will not return	1%	<1%
Not sure	6%	7%

# SATISFACTION

Satisfaction	2022	2023
Very satisfied	68%	66%
Satisfied	30%	33%
Dissatisfied	1%	<1%
Don't know	1%	1%

# TRIP EXPECTATIONS

Exceeded Expectations	2022	2023
Activities & attractions	57%	59%
Friendliness of people	53%	56%
Lodging	49%	47%
Customer service	45%	45%
Authentic & unique communities	47%	44%
Restaurants	38%	38%
Shopping	36%	36%
Value for your money	37%	35%

# OVERCROWDING

## Overcrowding

2022

2023

Overcrowded	7%	5%
A little overcrowded	22%	16%
The number of visitors was fine	52%	55%
Not at all overcrowded	17%	23%
Other	2%	1%

# STUDY METHODS



# METHODOLOGY



## Visitor Tracking

428 interviews were completed with visitors to Kennebec Valley online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1<sup>st</sup>, 2022 and November 30<sup>th</sup>, 2023.

## Economic Impact

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

# KENNEBEC VALLEY

## 2023 Economic Impact & Visitor Tracking Report

DECEMBER 2022 – NOVEMBER 2023

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