

MAINE LAKES & MOUNTAINS

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.

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



MAINE LAKES & MOUNTAINS

Compared to visitors to other regions, visitors to Maine Lakes & Mountains region are more likely to:

- » Use AAA to help plan their trip
- » Visit New Hampshire while planning their trip
- » Participate in active outdoor activities
- » Stay overnight in a personal second home
- » Say the activities & attractions exceeded their expectations



VISITOR JOURNEY: IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,825,443,300

in economic impact to Maine Lakes & Mountains' economy, up 2.8% from 2022



DIRECT SPENDING

Visitors to Maine Lakes & Mountains spent

\$1,168,406,700

throughout the county in 2023 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up 3.6% from 2022



VISITORS

Maine Lakes & Mountains attracted
2,199,300
visitors in 2023, up 13.6% from 2022



VISITORS DAYS*

All visitors to Maine Lakes & Mountains spent

11,349,000

days in Maine Lakes & Mountains throughout
2023, up 28.8% 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. Year over year increase is largely due to significant increase in visitors staying overnight with friends/family, who tend to have a longer length of stay.

Maine Lakes & Mountains

ROOM NIGHTS

Visitors to Maine Lakes & Mountains generated

1,457,800

nights in Maine Lakes & Mountains accommodations throughout 2023, down 4.0% from 2022



JOBS SUPPORTED*

Visitors to Maine Lakes & Mountains supported

15,900

jobs throughout the county in 2023, down 12.6% 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.

Maine Lakes & Mountains

WAGES GENERATED

Visitors to Maine Lakes & Mountains
supported

\$650,081,700

in wages paid to Maine Lakes & Mountains
employees in 2023, up 10.7% from 2022



VISITORS & JOBS

Every
138
visitors supports a new job in Maine Lakes & Mountains



HOUSEHOLD SAVINGS

Visitors to Maine Lakes & Mountains saved
local households

\$1,574

in state and local taxes in 2023



LODGING METRICS*

Occupancy Rate

47.7%

- 11.3% from 2022

Average Daily Rate

\$216.70

- 3.3% from 2022

Revenue per Available Room

\$103.43

- 14.2% 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.

Maine Lakes & Mountains

15

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RESEARCH

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Traveler
Profile

Trip
Experience

Post-Trip
Evaluation

Impact of
Tourism

TRIP PLANNING CYCLE

- » **73%** of visitors started planning their trip a month or more in advance of their trip
- » **61%** of visitors have a booking window of less than 3 months



TOP TRIP PLANNING SOURCES*



40% Advice from family/friends

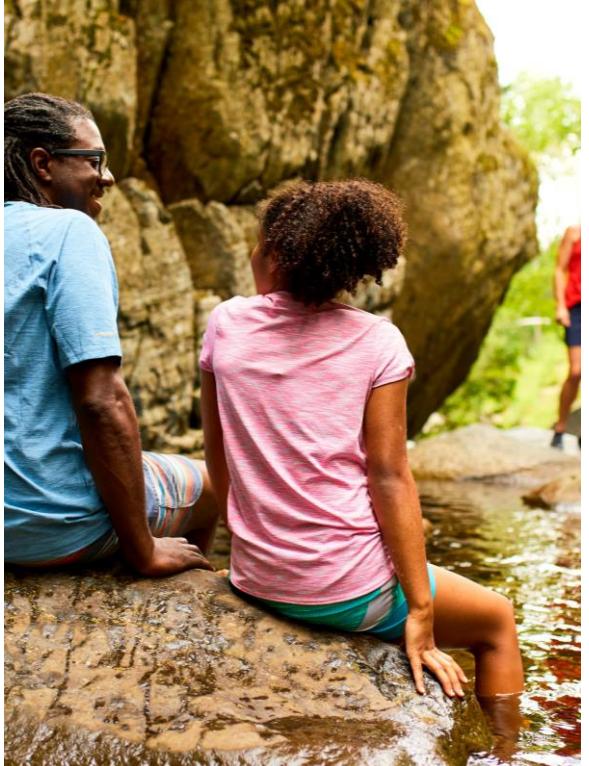


33% Online search engines



22% Articles or Travelogues

TOP REASONS FOR VISITING*



30% Visit friends/family



29% Relax and unwind



25% Sightseeing/touring



23% Nature/bird-watching

CONSIDERING MAINE AS A DESTINATION

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



TV SHOWS & FILM*

- » **7%** of visitors said a TV show or film inspired their trip to Maine
- » **43%** of visitors who were inspired by a TV show or film said visiting a location of a TV show or film was one of the activities I engaged in while in Maine



*Questions were not asked until January 2023.

PRE-TRIP RECALL OF ADVERTISING

- » Over **half** of visitors recalled advertising or promotions for Maine prior to their trip (**+4%** points from 2022)
- » Like last year, this information influenced **32%** of all visitors to visit Maine



TOP SOURCES OF ADVERTISING RECALL*

Base: 53% of visitors who recall advertising



54% Social media

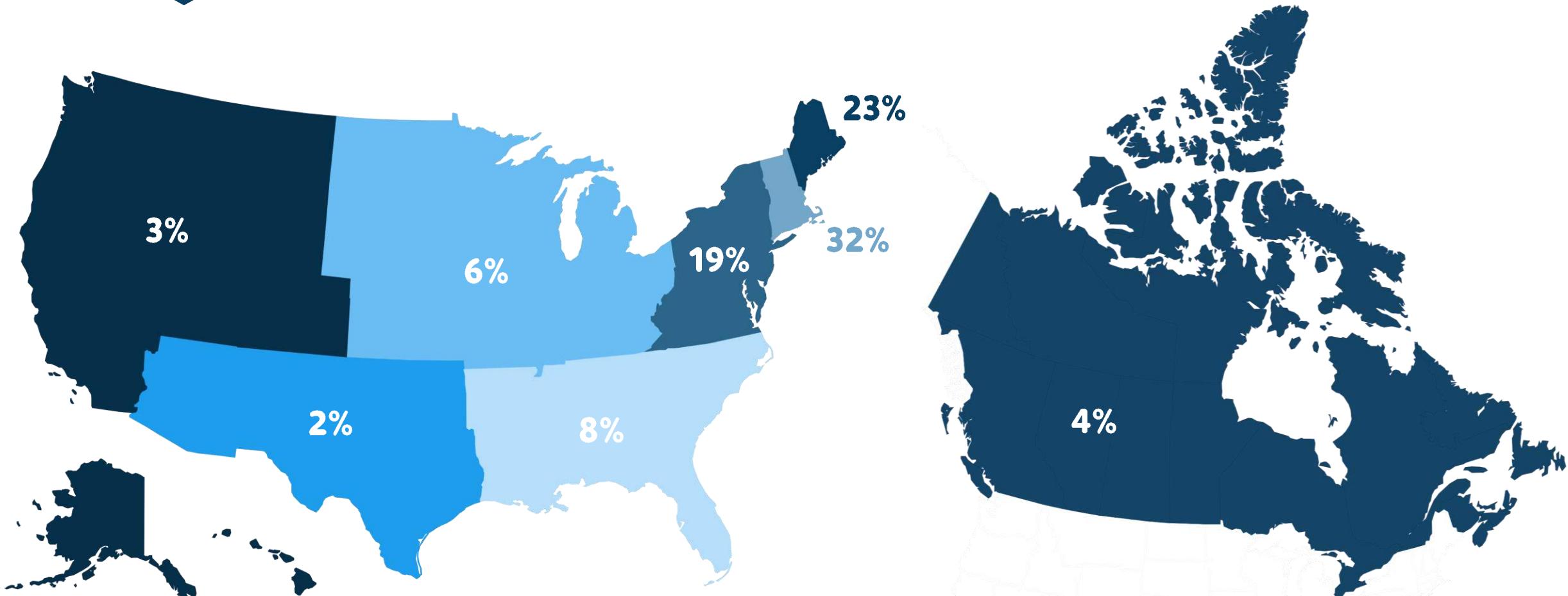


38% Internet

VISITOR JOURNEY: TRAVELER PROFILE



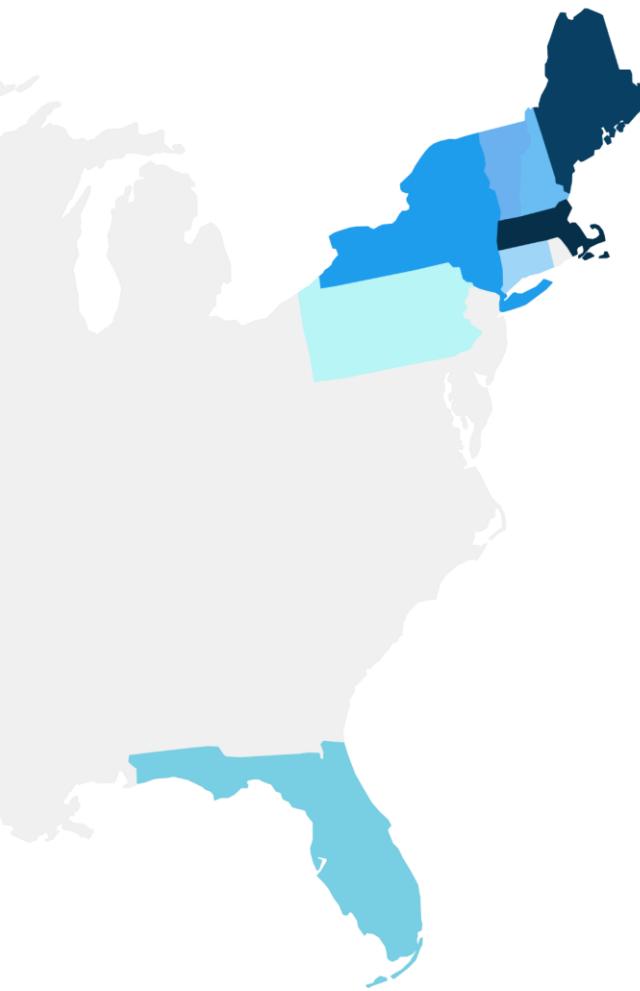
REGIONS OF ORIGIN



3% of visitors came from outside of the United States and Canada.

4% of visitors came from Canada.

TOP ORIGIN STATES & PROVINCES



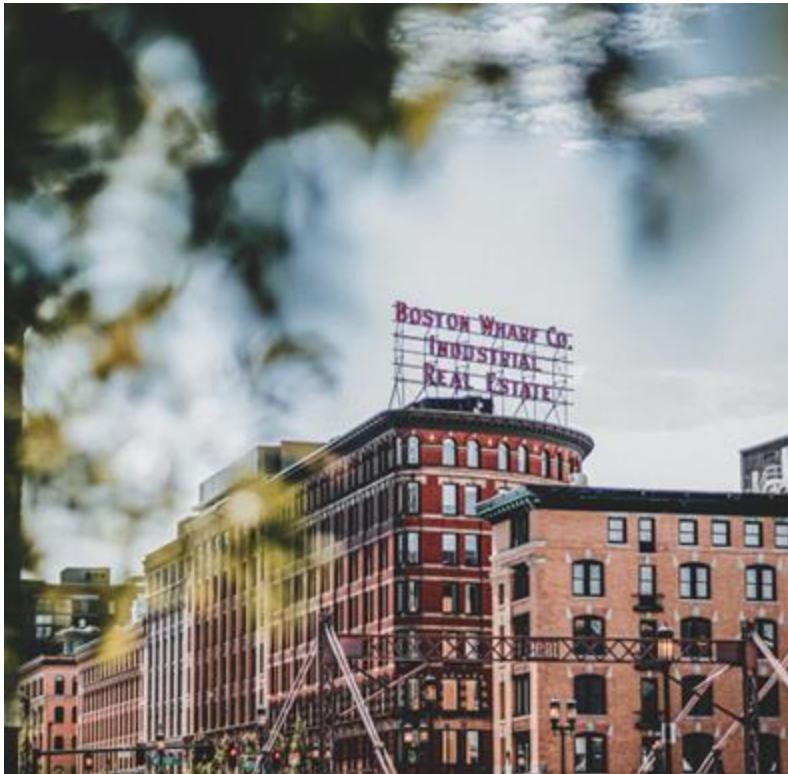
71%

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

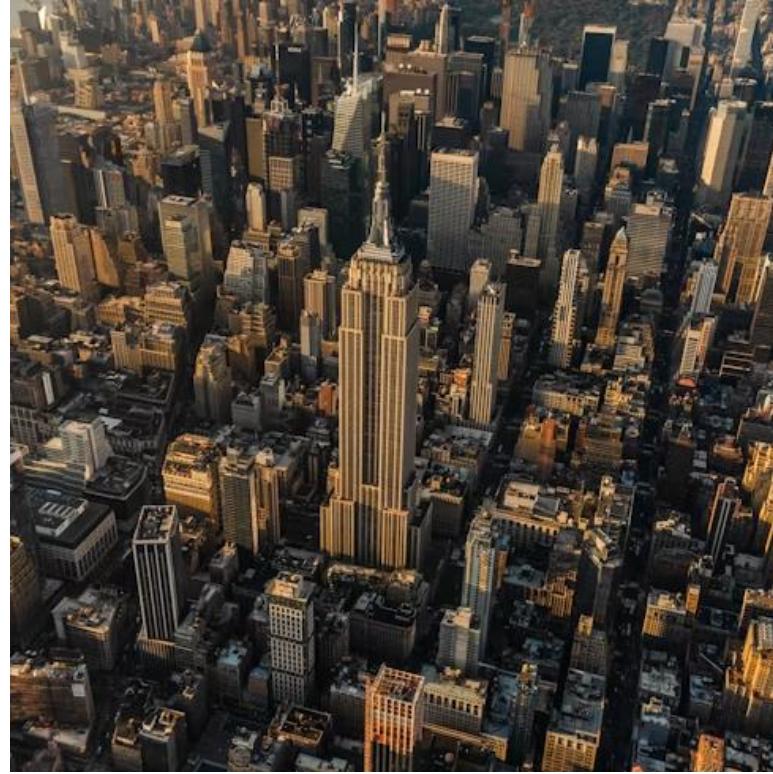
- 23 % Maine
- 15 % Massachusetts
- 9 % New York
- 7 % New Hampshire

- 5 % Vermont
- 4 % Connecticut
- 4 % Florida
- 4 % Pennsylvania

TOP ORIGIN MARKETS



11% Boston



8% New York City¹



5% Portland

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

Maine Lakes & Mountains

TRAVEL PARTIES

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



19% 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 old¹
 - » Is white – **91%**
 - » Is a college graduate – **79%**
 - » Is married/in a domestic partnership – **79%**
 - » Is employed full-time – **59%**
 - » Has an annual household income² of **\$92,100**



¹Median age.

²Median household income.

NEW & RETURNING VISITORS

- » 17% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 36% had previously traveled in Maine more than 10 times



VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

- » Maine is a drive-market for most visitors, with **84%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport



NIGHTS STAYED

- » 80% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed 5.1* nights in Maine on their trips



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

Maine Lakes & Mountains

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RESEARCH

TOP ACCOMMODATIONS



22% Friends/family home



20% Did not stay overnight



17% Hotel/motel/resort



17% Personal second home

TOP IN-MARKET VISITOR RESOURCES*



42% Navigation website/apps (i.e., Google or Apple Maps, etc.)



32% Restaurant website/app



25% Personal social media

TOP VISITOR ACTIVITIES*



62% Food/beverage/culinary



50% Active outdoor activities



47% Touring/sightseeing

VISITING OTHER STATES & PROVINCES

- » Nearly **3 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » Nearly **3 in 10** visitors also visited New Hampshire 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 (+8% points from 2022)
- » Around **1 in 3** visitors visited the Midcoast & Islands in addition to their primary destination within Maine



VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **98%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » **98%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **75%** would definitely recommend



LIKELIHOOD OF RETURNING TO MAINE

- » **91%** of visitors will return to Maine for a future visit or vacation
- » **71%** 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
- » Nearly 2 in 3 visitors were very satisfied with their trip to Maine



OVERCROWDING

- » 50% of visitors thought the number of visitors during their trip to Maine was fine
- » 23% of visitors thought it was a little overcrowded (-7% points from 2022)



DETAILED FINDINGS



VISITOR JOURNEY: IMPACT OF TOURISM



KEY PERFORMANCE INDICATORS

Economic Impact	2021	2022	2023	Δ% from '22
Number of Visitors	2,002,000	1,936,700	2,199,300	+ 13.6%
Visitor Days*	NA	8,808,100	11,349,000	+ 28.8%
Room nights generated	1,560,700	1,518,500	1,457,800	- 4.0%
Direct expenditures	\$1,116,494,700	\$1,127,957,800	\$1,168,406,700	+ 3.6%
Total economic impact	\$1,768,002,500	\$1,775,825,100	\$1,825,443,300	+ 2.8%

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

Year over year increase is largely due to significant increase in visitors staying overnight with friends/family, who tend to have a longer length of stay.

EMPLOYMENT IMPACTS

Lakes & Mountains Jobs	2021	2022	2023	Δ% from '22
Jobs supported (direct)	15,900	13,900	12,200	- 12.2%
Total jobs supported	20,300	18,200	15,900	- 12.6%*

Lakes & Mountains Wages	2021	2022	2023	Δ% from '22
Wages paid (direct)	\$421,639,300	\$401,927,100	\$458,078,600	+ 14.0%
Total wages paid	\$616,167,700	\$587,082,200	\$650,081,700	+ 10.7%

*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.

Maine Lakes & Mountains

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RESEARCH

RETURN ON INVESTMENT

Return on Investment	2021	2022	2023
Visitors per job supported	99	106	138
State & local taxes supported	\$148,609,400	\$140,246,500	\$163,264,800
Tax savings per household	\$1,194	\$1,326	\$1,574

LODGING METRICS*

Lodging Metrics	2021	2022	2023	Δ% from '22
Occupancy Rate (%)	50.2%	53.8%	47.7%	- 11.3%
Average Daily Rate	\$196.98	\$224.03	\$216.70	- 3.3%
RevPAR	\$98.88	\$120.53	\$103.43	- 14.2%
Total Lodging Revenue**	\$206,166,900	\$211,750,300	\$240,041,200	+ 13.4%

*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

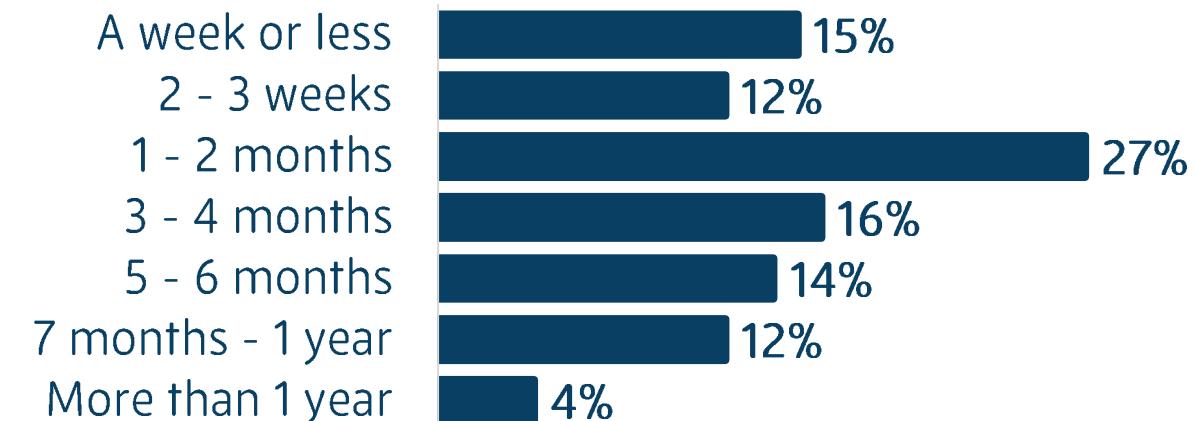
Post-Trip
Evaluation

Impact of
Tourism

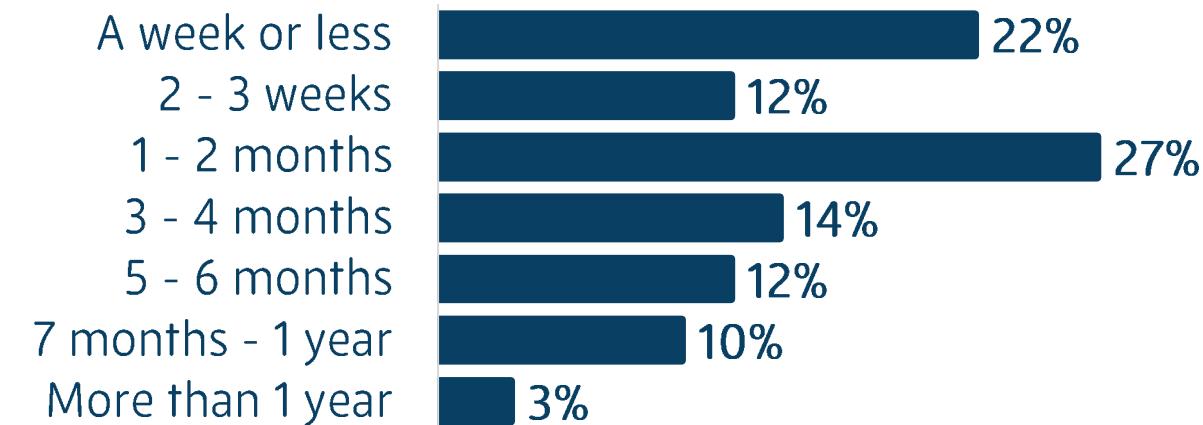
TRIP PLANNING CYCLE

- » Typical visitors began planning their trip **56 days** in advance (+3 days from 2022)
- » **73%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **48 days** in advance (+1 day from 2022)
- » **61%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

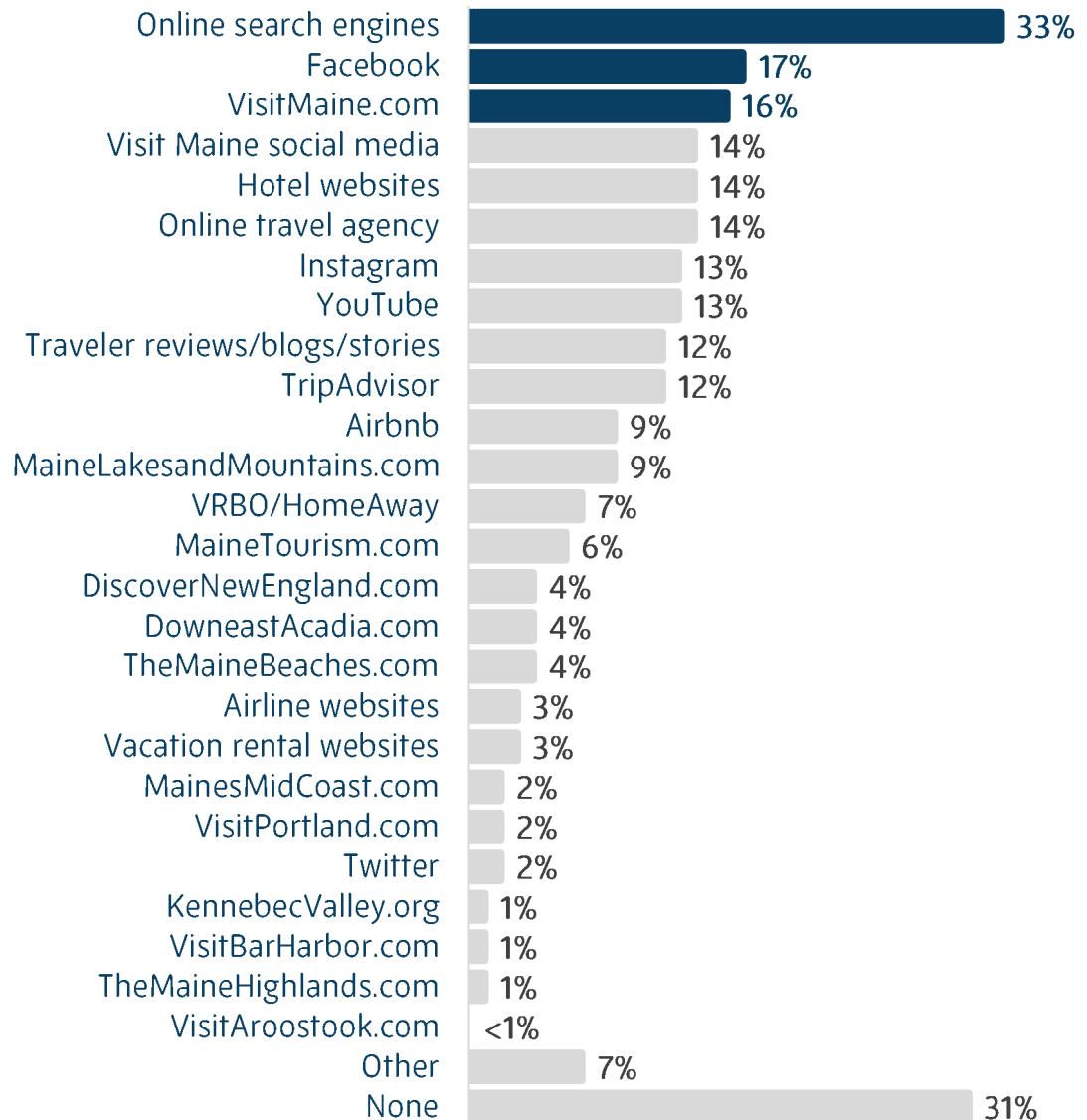


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

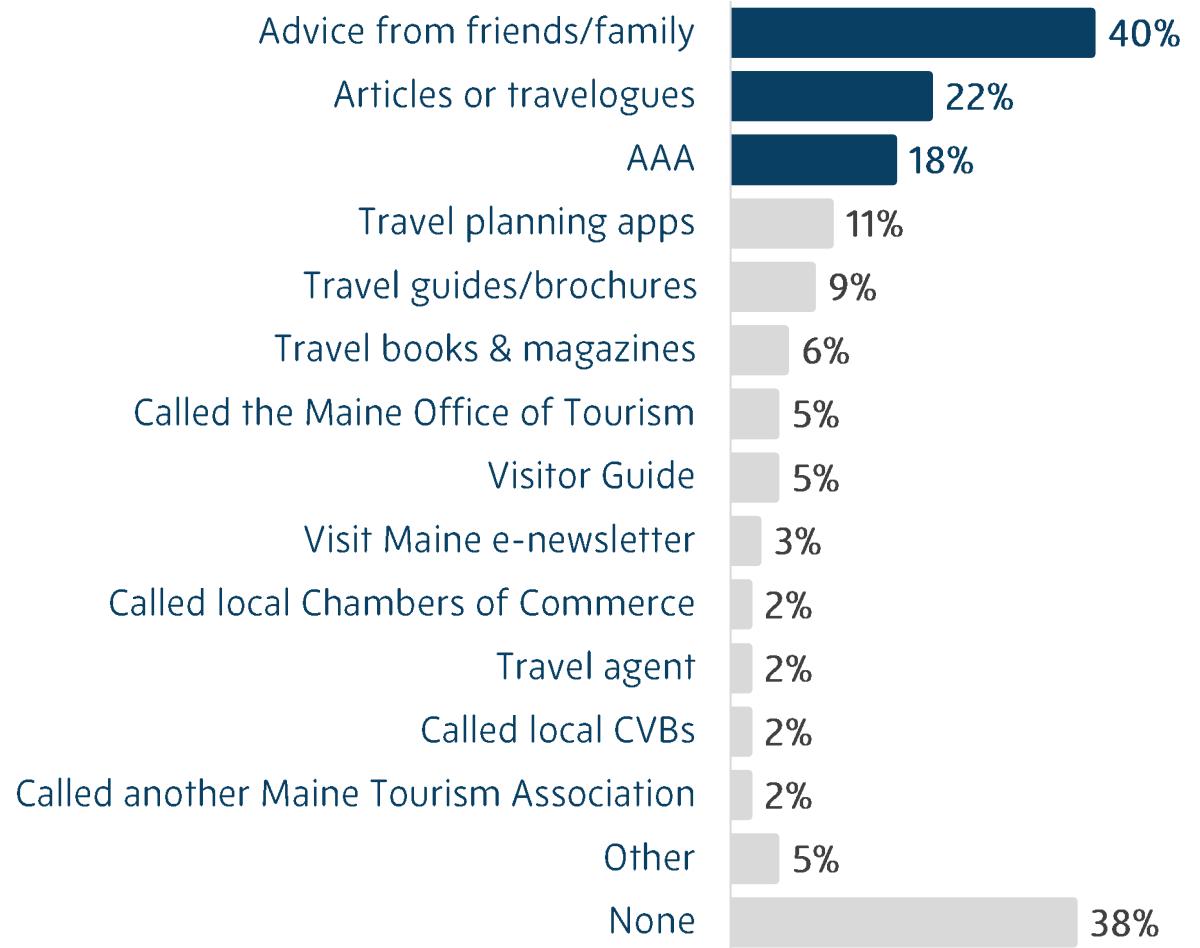
- » Nearly 7 in 10 visitors used one or more online resources to help them plan their trip in Maine
- » 1 in 3 visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » 1 in 6 visitors used VisitMaine.com (-5% points from 2022)



*Multiple responses permitted.

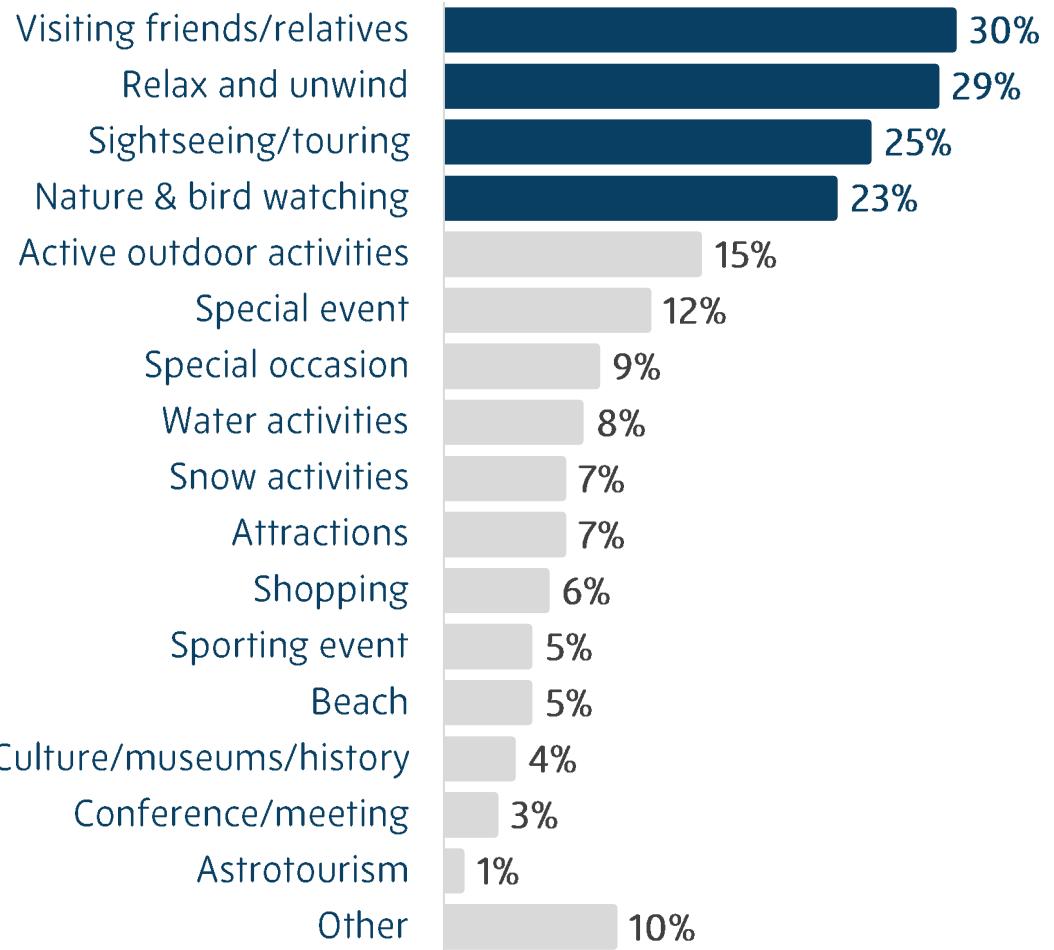
OTHER TRIP PLANNING SOURCES*

- » **2 in 5** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » Over **1 in 5** visitors used articles or travelogues
- » Over **1 in 6** used AAA (-4% points from 2022)
- » Nearly **2 in 5** visitors did not use any other resources to help them plan their trip in Maine



REASONS FOR VISITING*

- » About **3 in 10** visitors came to Maine to visit friends and relatives or to relax and unwind
- » About **1 in 4** came to the area for sightseeing and touring or nature & bird watching



*Multiple responses permitted.

TV SHOWS & FILM*

- » **7%** of visitors said a TV show or film inspired their trip to Maine
- » **43%** 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
- » **10%** 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: 7% of visitors who were inspired by a TV show or film

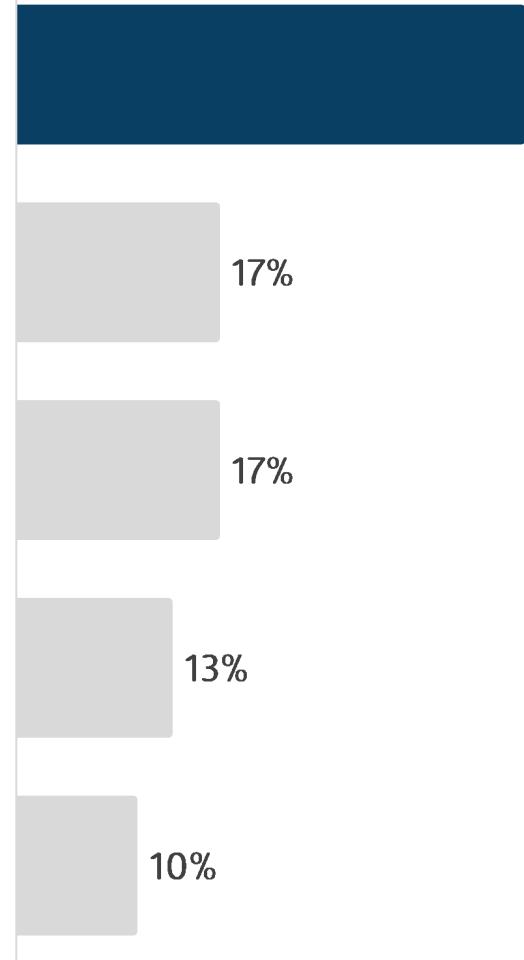
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine

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

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

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

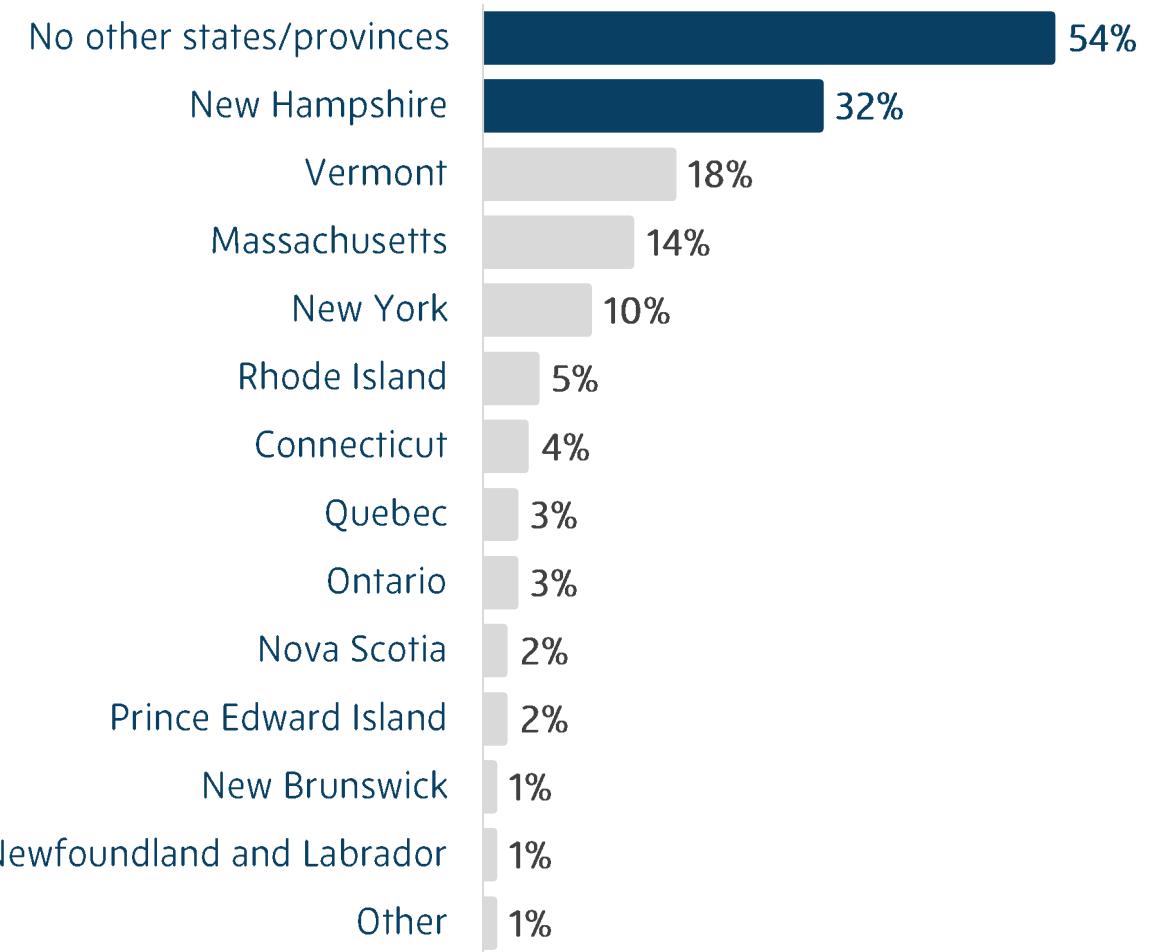
Something else



*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

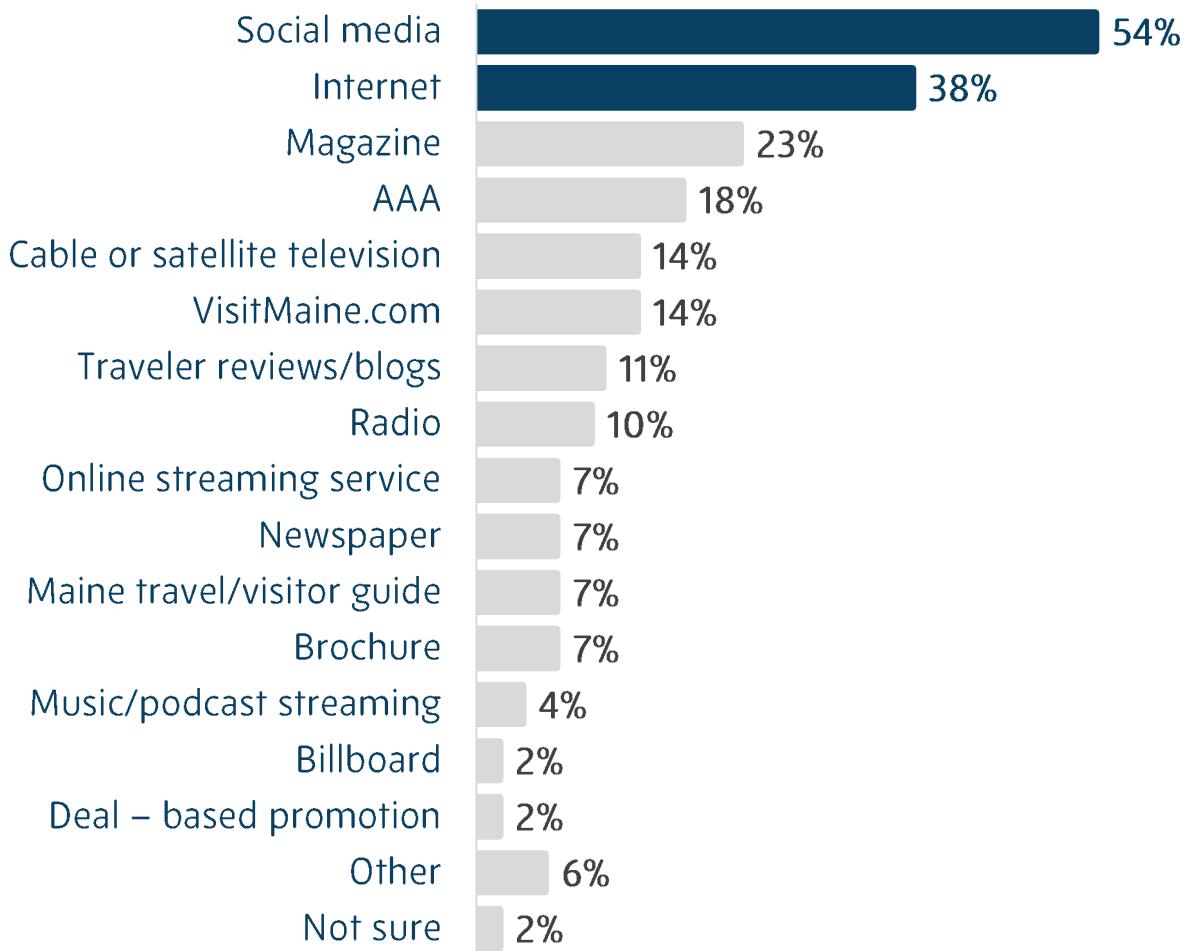
- » Like last year, over **half** of visitors considered visiting **ONLY** Maine while planning their trips
- » **1 in 3** visitors considered visiting New Hampshire while planning their trips
- » Visitors were more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

- » Over half of visitors recalled advertising or promotions for Maine prior to their trip (+4% points from 2022)
- » Visitors who recalled this advertising primarily saw it on **social media** (+10% points from 2022) or the **internet** (-4% points from 2022)
- » Like last year, this information influenced **32% of all** visitors to visit Maine

Base: 53% of visitors who recalled advertising

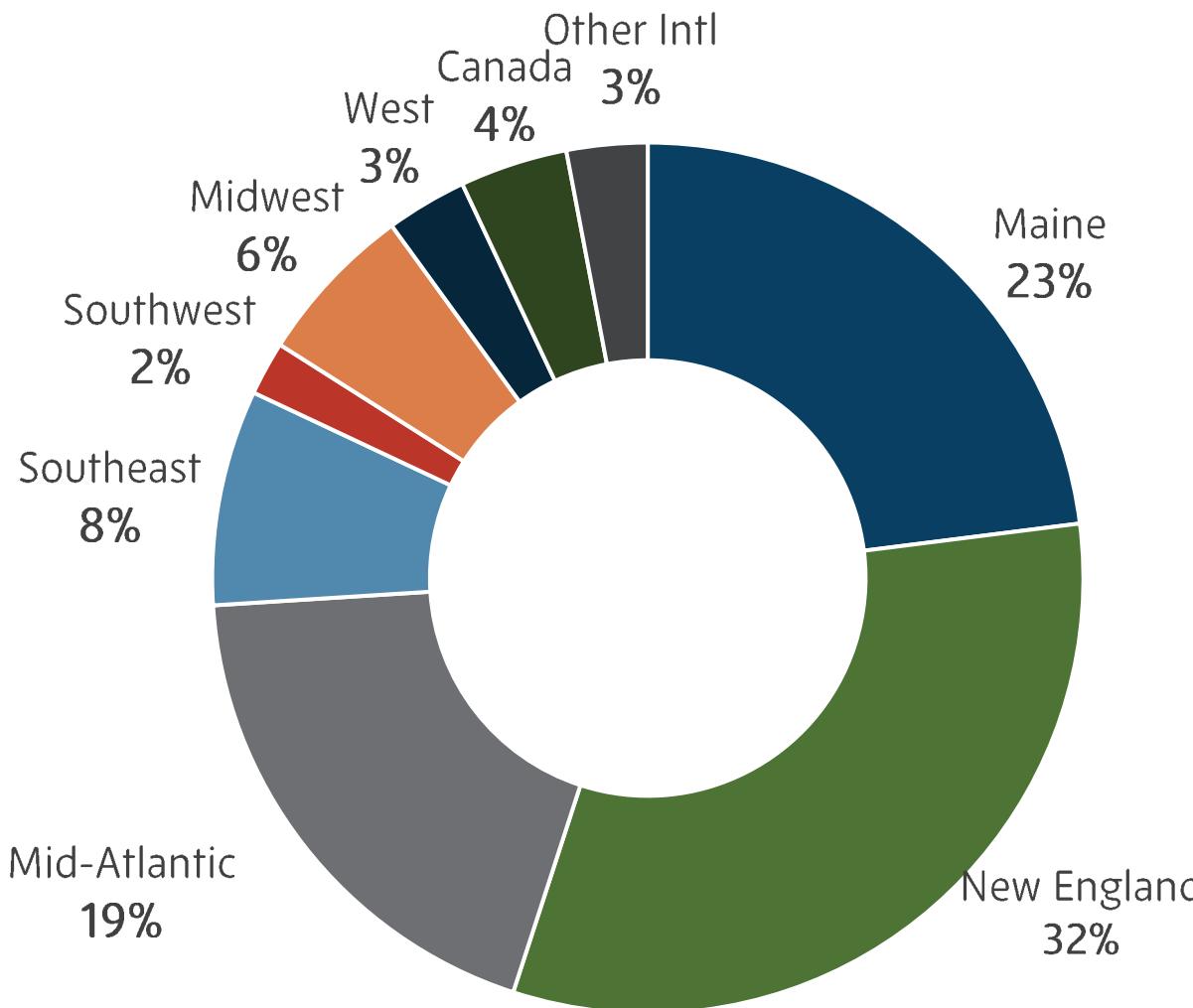


*Multiple responses permitted.

VISITOR JOURNEY : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **82%** of visitors traveled to/within Maine from **13** U.S. states and Canadian provinces
- » Nearly **1 in 4** visitors were residents of Maine traveling throughout the state

State	Percent
Maine	23%
Massachusetts	15%
New York	9%
New Hampshire	7%
Vermont	5%
Connecticut	4%
Florida	4%
Pennsylvania	4%
New Jersey	3%
Virginia	2%
Ohio	2%
California	2%
Ontario	2%

TOP ORIGIN MARKETS

- » Nearly 1 in 3 visitors traveled from 7 U.S. markets
- » 11% of visitors traveled to Maine from Boston

Market	Percent
Boston	11%
New York City ¹	8%
Portland	5%
Auburn - Lewiston	2%
Augusta	2%
Philadelphia	2%
Washington DC - Baltimore ²	2%

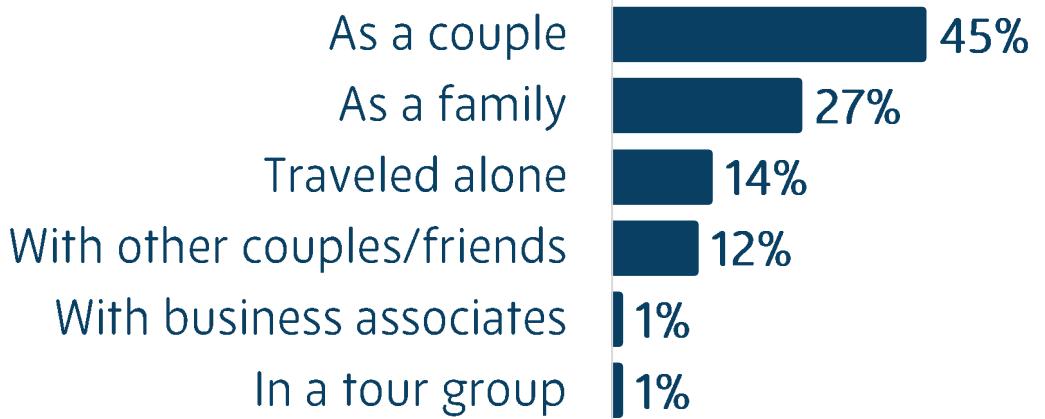
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

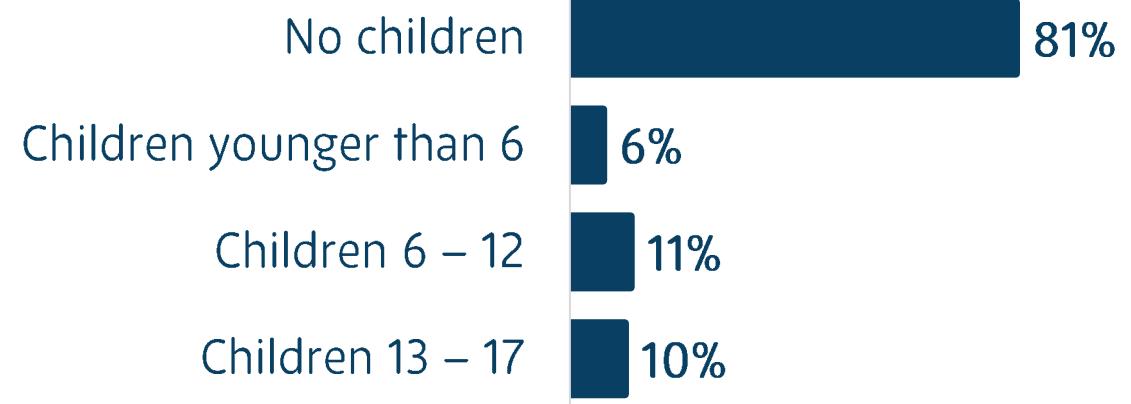
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.9** people
- » Nearly **half** of visitors traveled as a couple
- » Over **1 in 4** traveled as a family
- » **19%** of visitors traveled with one or more children in their travel party

Travel Party Composition



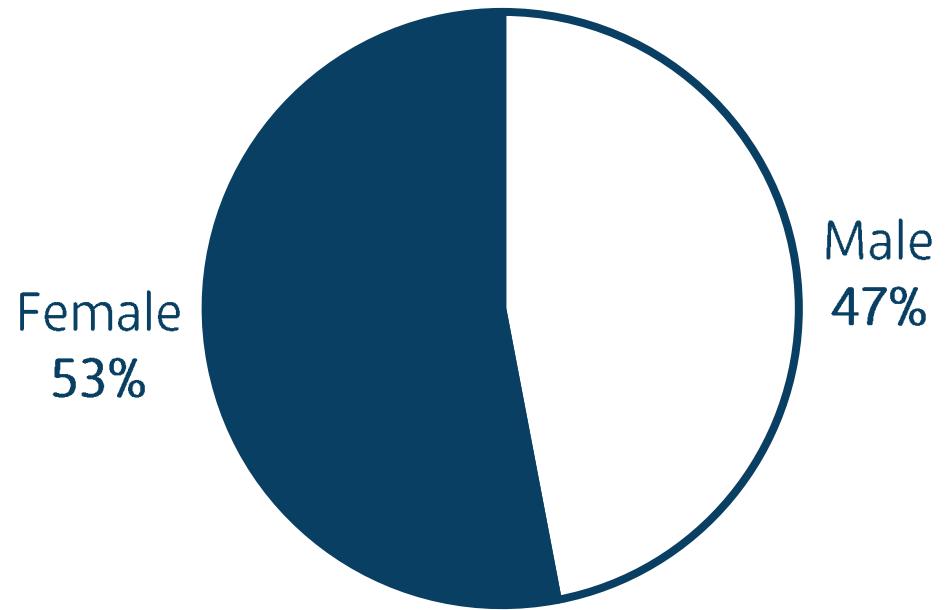
Children in Travel Party*



*Multiple responses permitted.

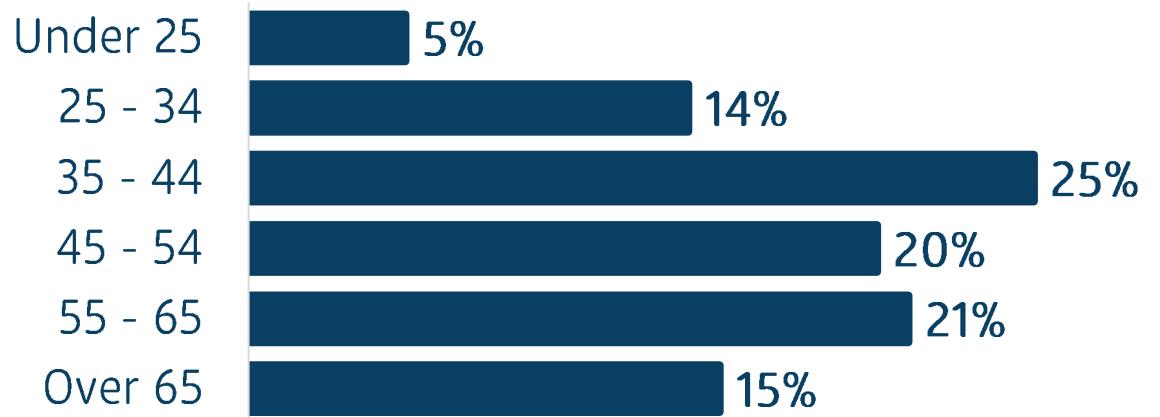
GENDER

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



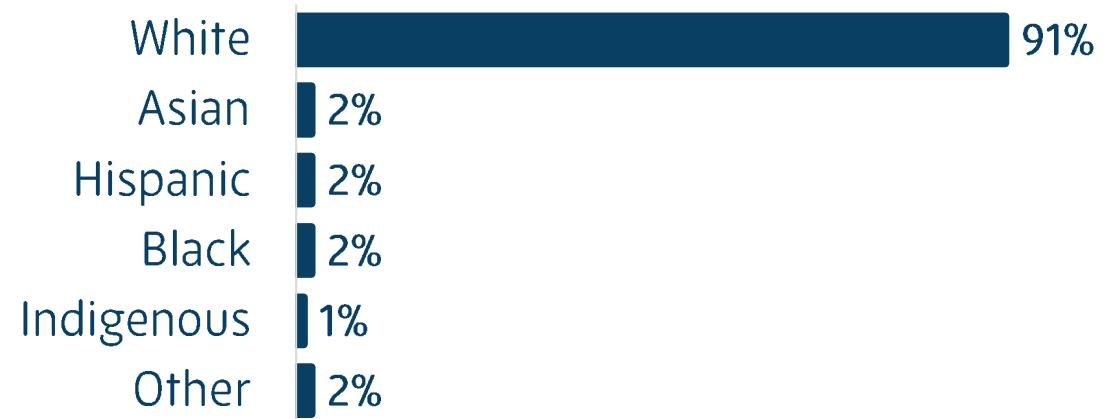
*May be influenced by visitors' willingness to complete a survey.

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



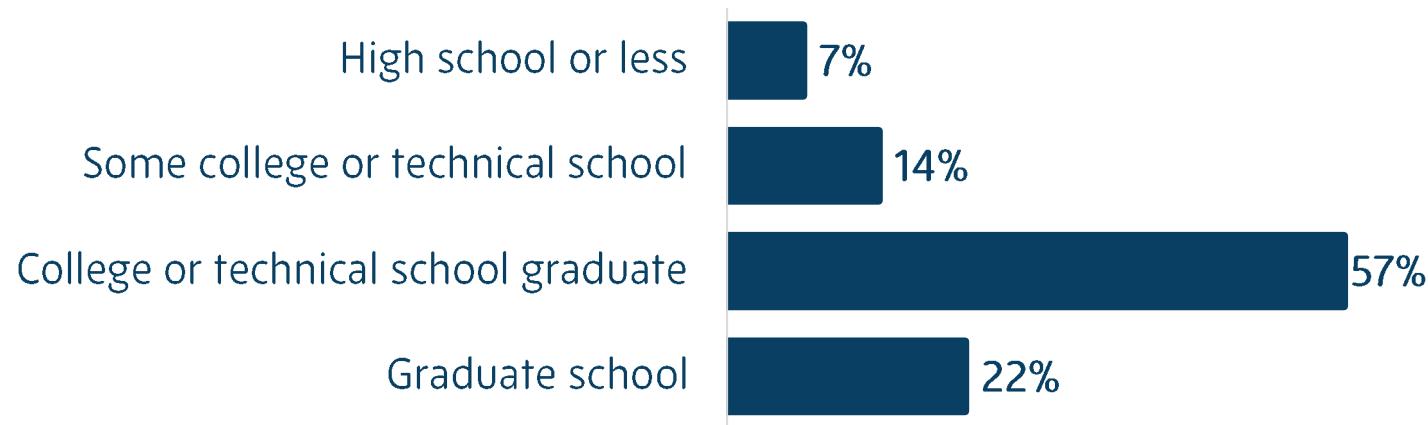
RACE & ETHNICITY

» Over 9 in 10 visitors to Maine were white



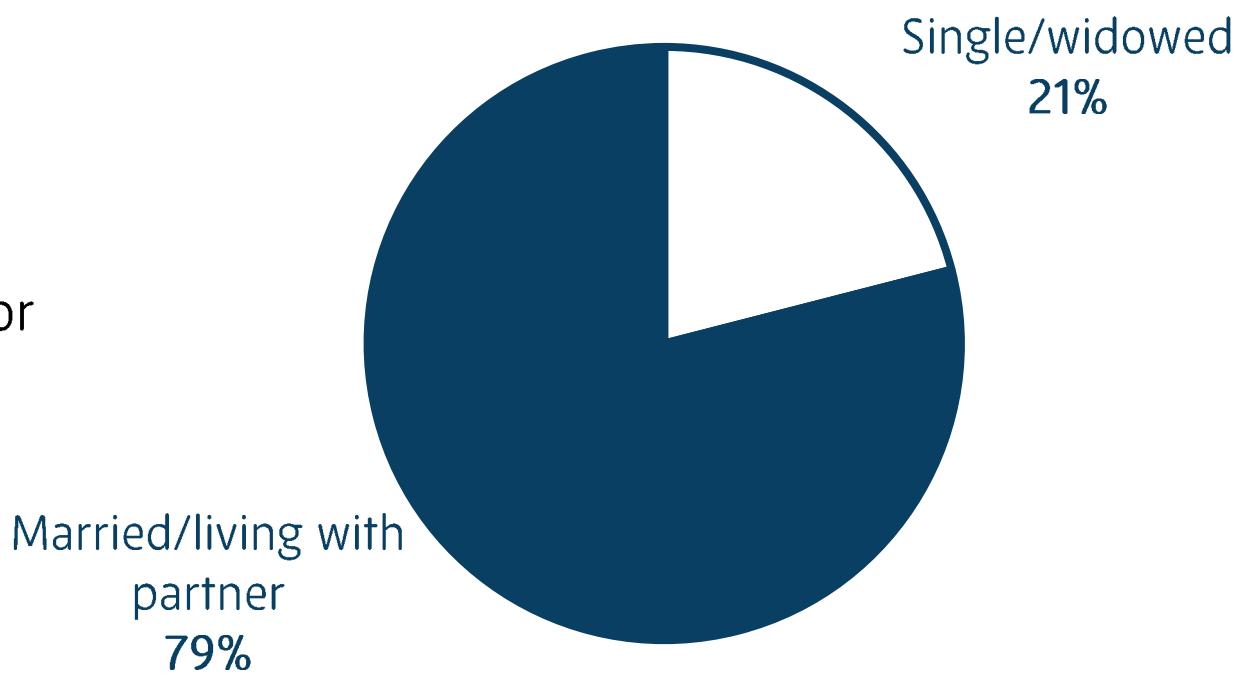
EDUCATIONAL ATTAINMENT

» Nearly **4 in 5** visitors have a college/technical school degree or higher



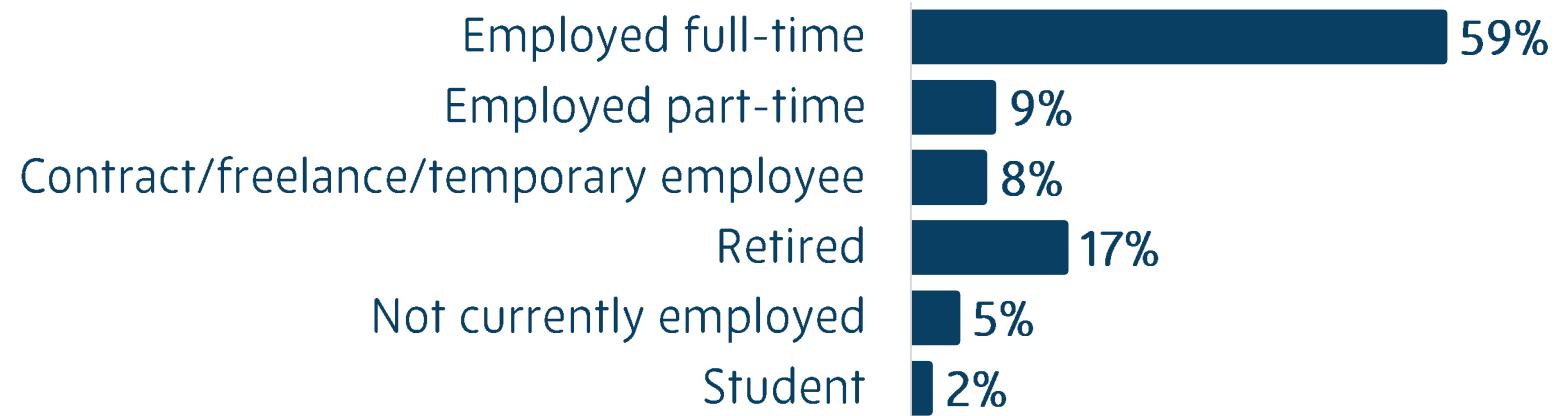
MARITAL STATUS

- » Nearly **4 in 5** visitors to Maine were married or living with their partner



EMPLOYMENT STATUS

» Over 3 in 4 visitors to Maine were employed, most full-time



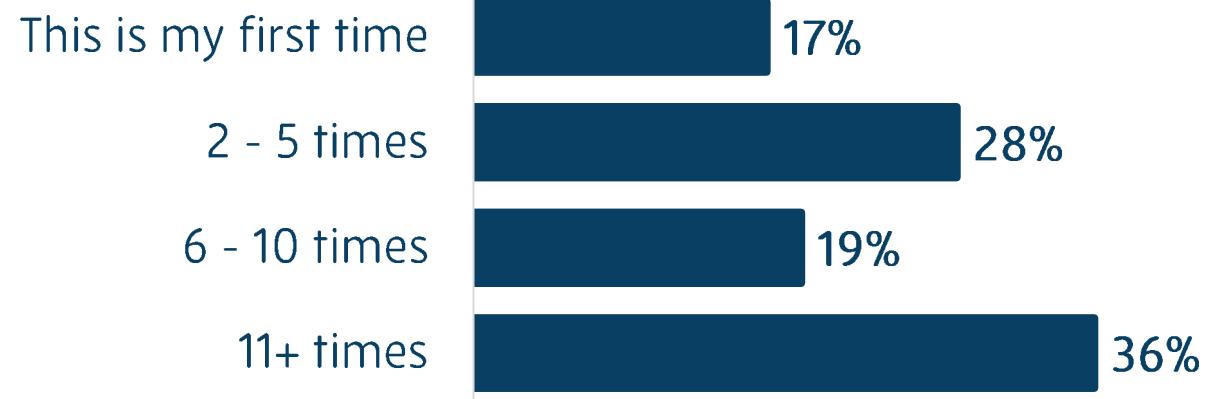
HOUSEHOLD INCOME

- » The average household income of visitors to Maine is **\$92,100** per year
- » **23%** of visitors to Maine earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » 17% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 36% had previously traveled in Maine more than 10 times

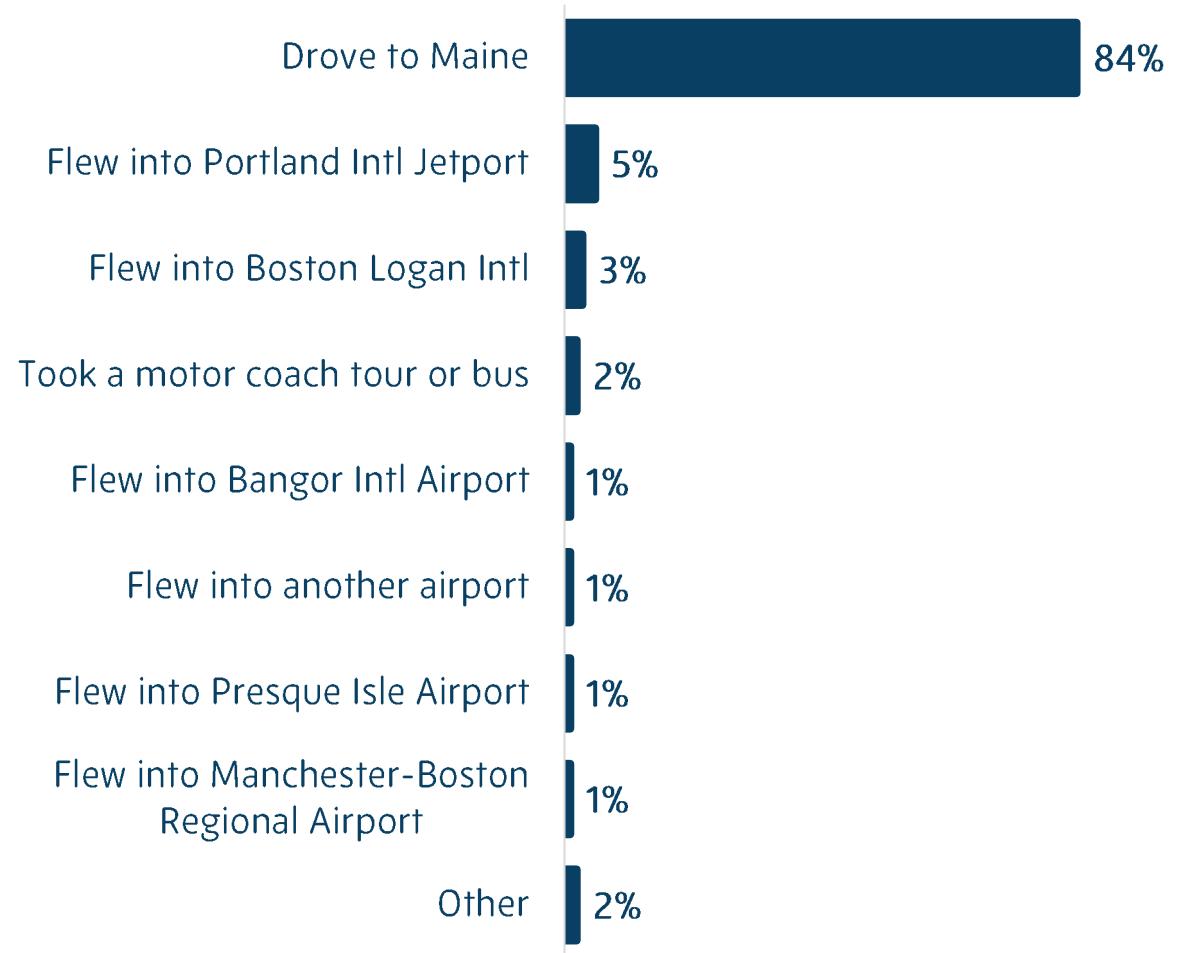


VISITOR JOURNEY : TRIP EXPERIENCE



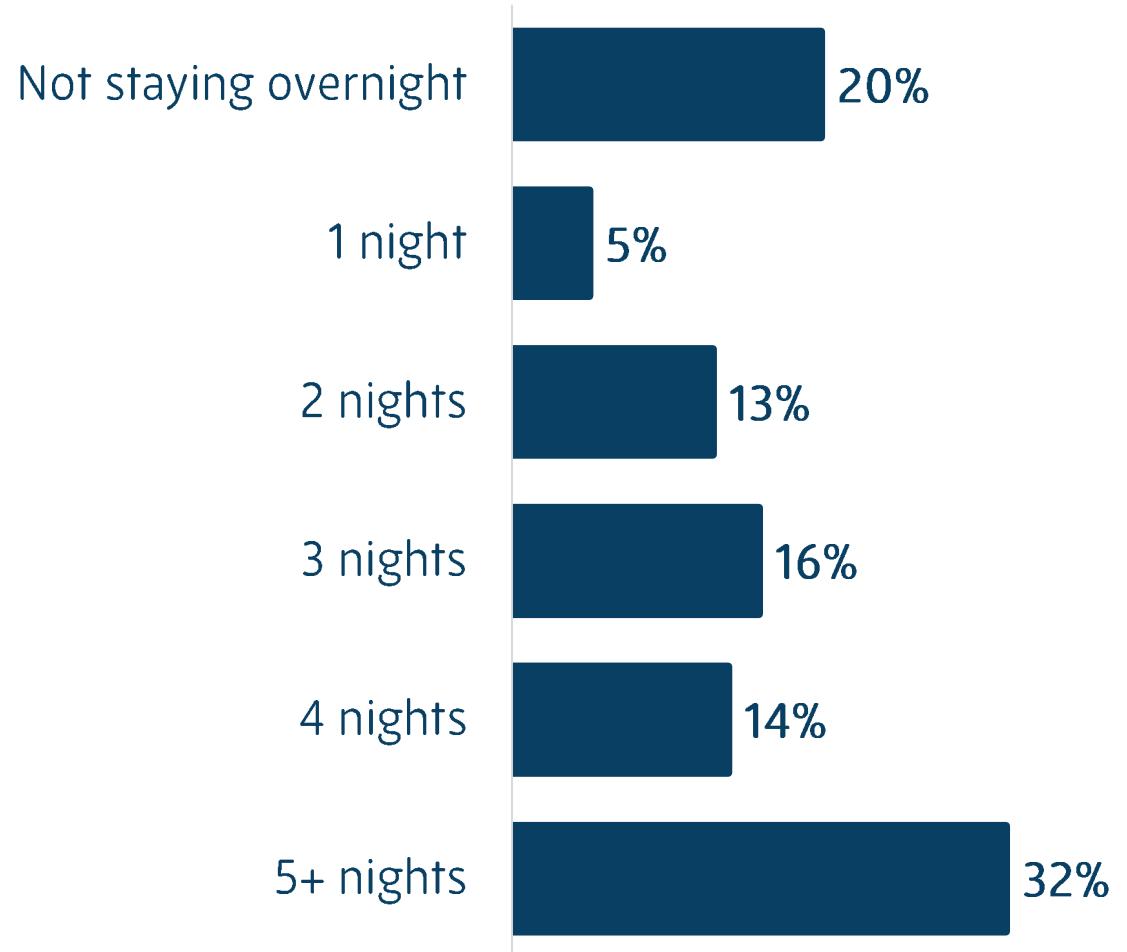
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with 84% choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport



NIGHTS STAYED

- » 80% of visitors stayed one or more nights in Maine on their trip (+8% points from 2022)
- » Typical visitors stayed 5.1* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 5.6 nights in Maine on their trips

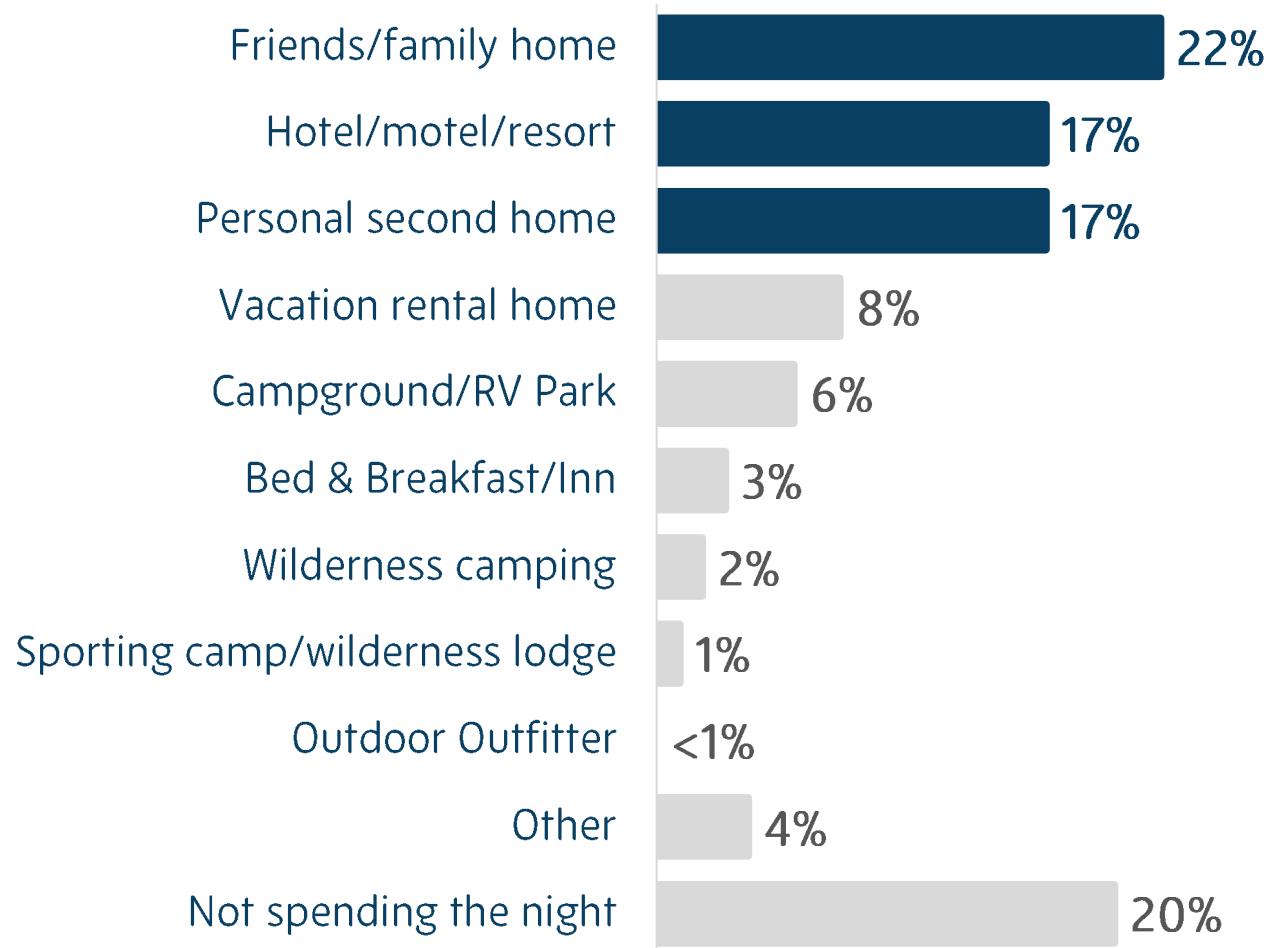


*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Maine Lakes & Mountains

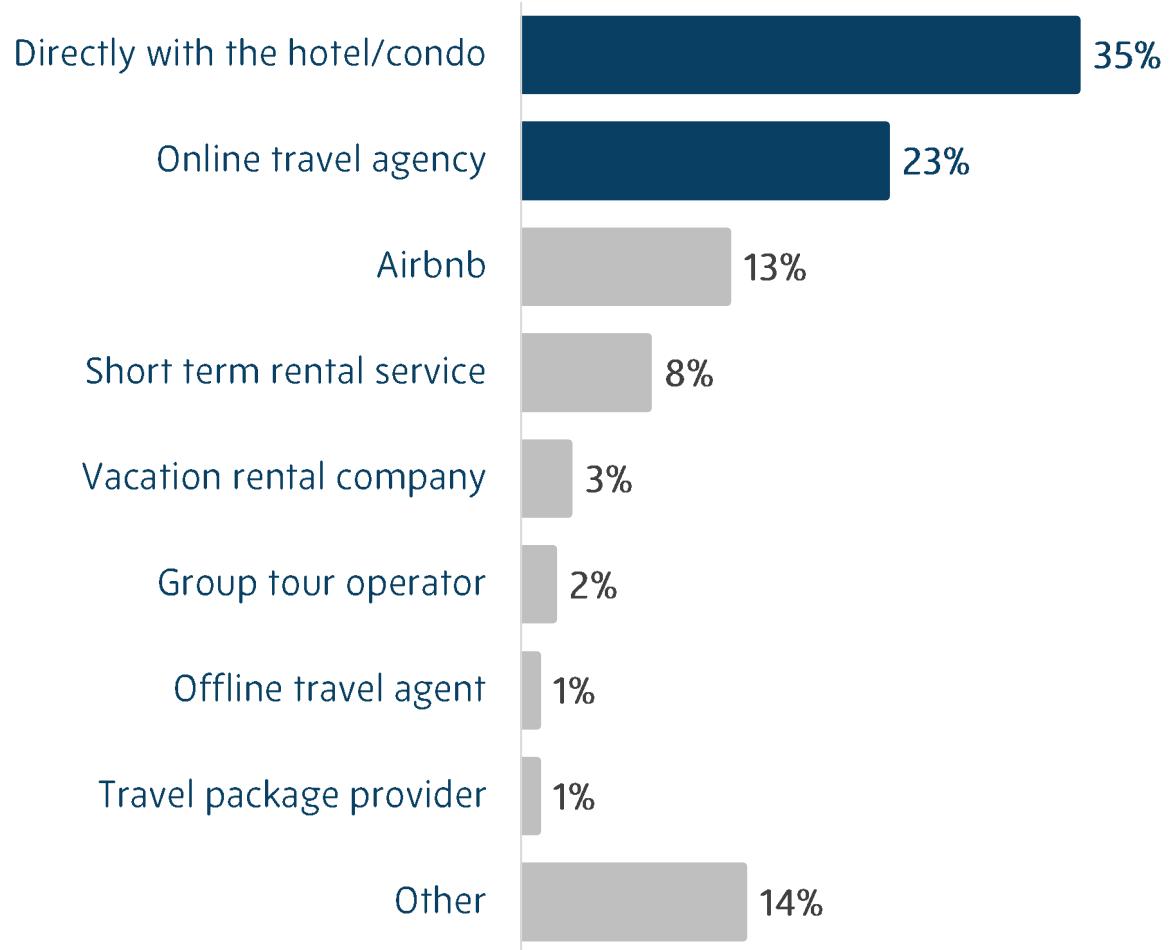
ACCOMMODATIONS

» About **1 in 5** visitors stayed overnight in a friends/family home or did not stay over night



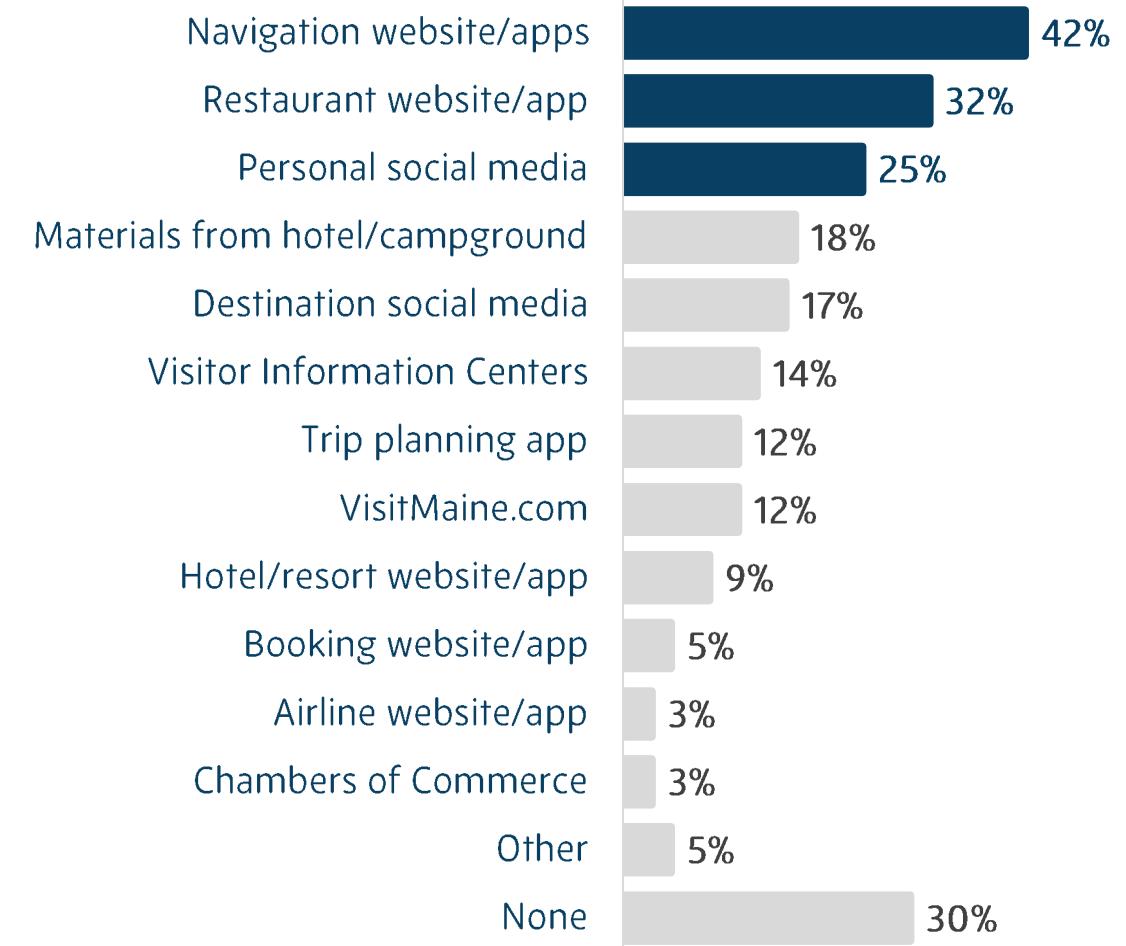
BOOKING METHODS

» Over 1 in 3 visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



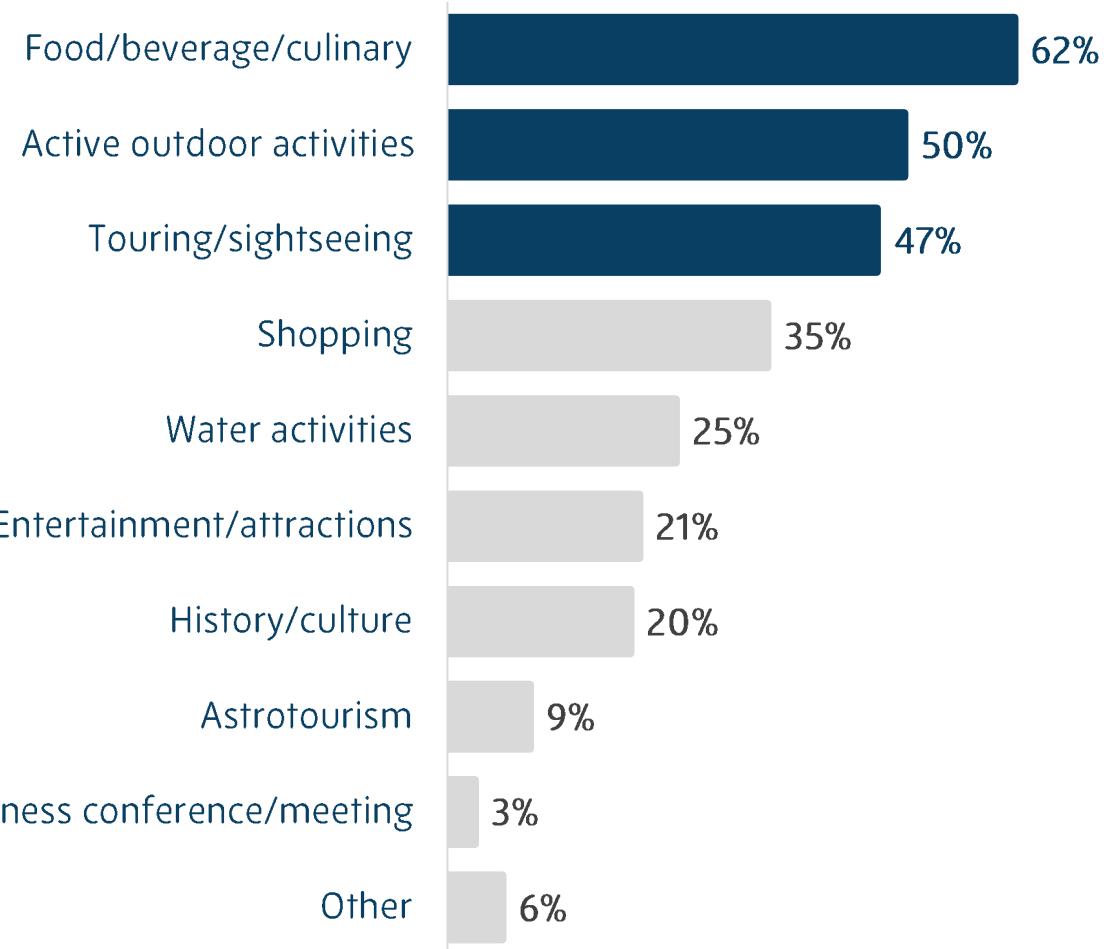
IN-MARKET VISITOR RESOURCES*

- » Visitors were most likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Over **3 in 10** visitors used restaurant websites/apps
- » **3 in 10** visitors did not use any resources to plan activities while they were in-market

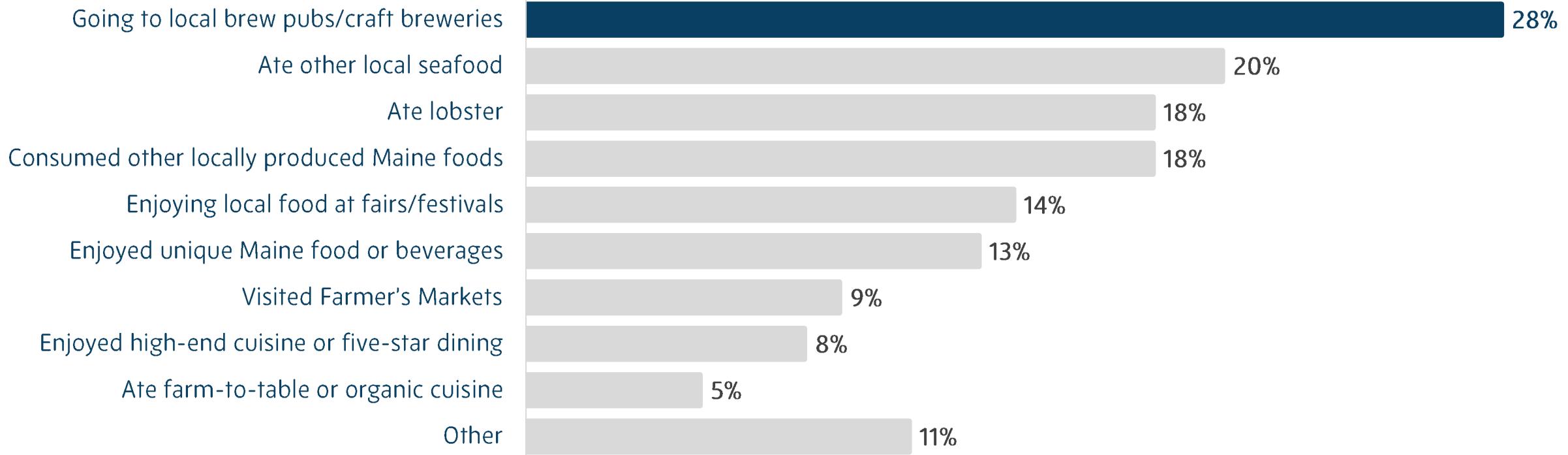


VISITOR ACTIVITIES*

- » 62% of visitors engaged in food/beverage/culinary activities during their trip to Maine
- » About **half** of visitors participated in active outdoor activities and touring/sightseeing during their trip to Maine

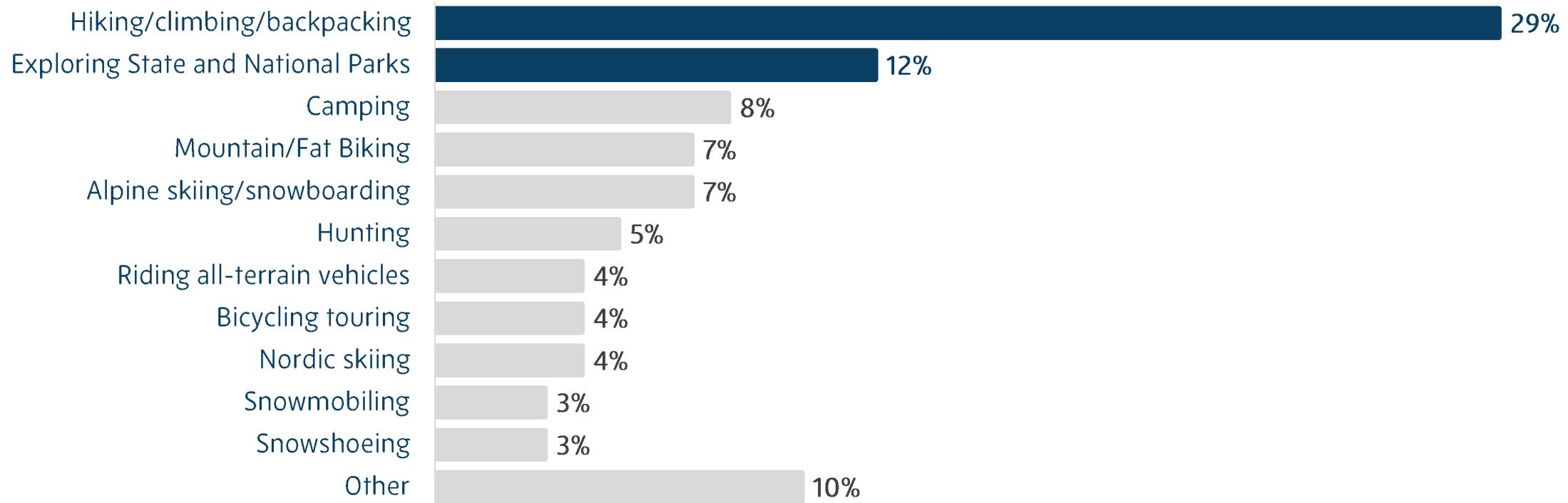


FOOD & BEVERAGE ACTIVITIES*

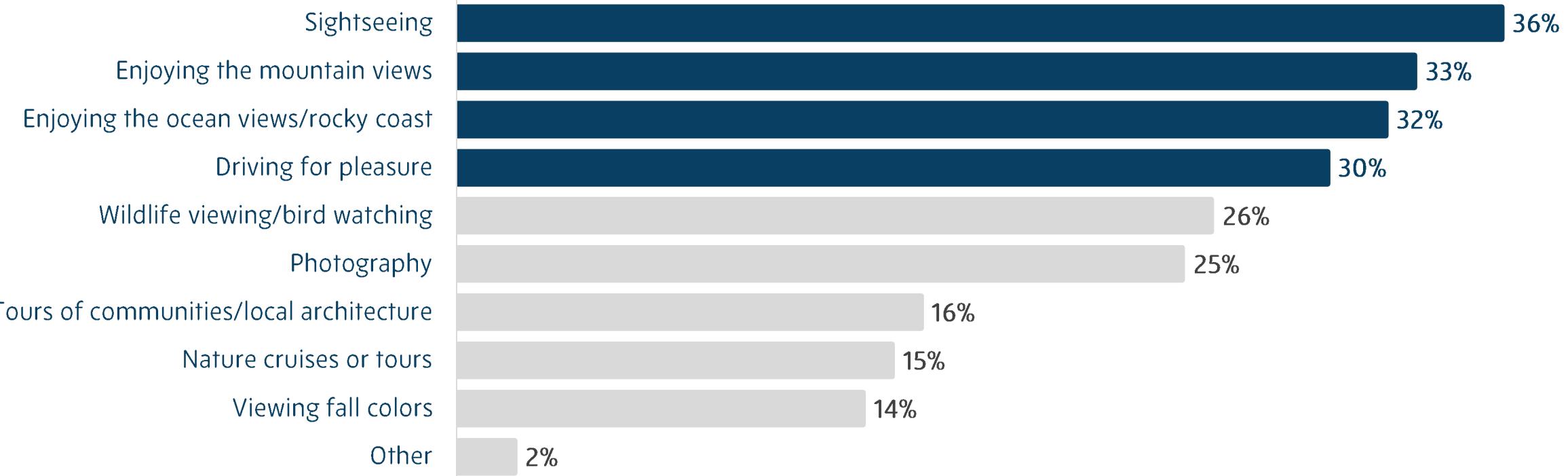


*Multiple responses permitted.

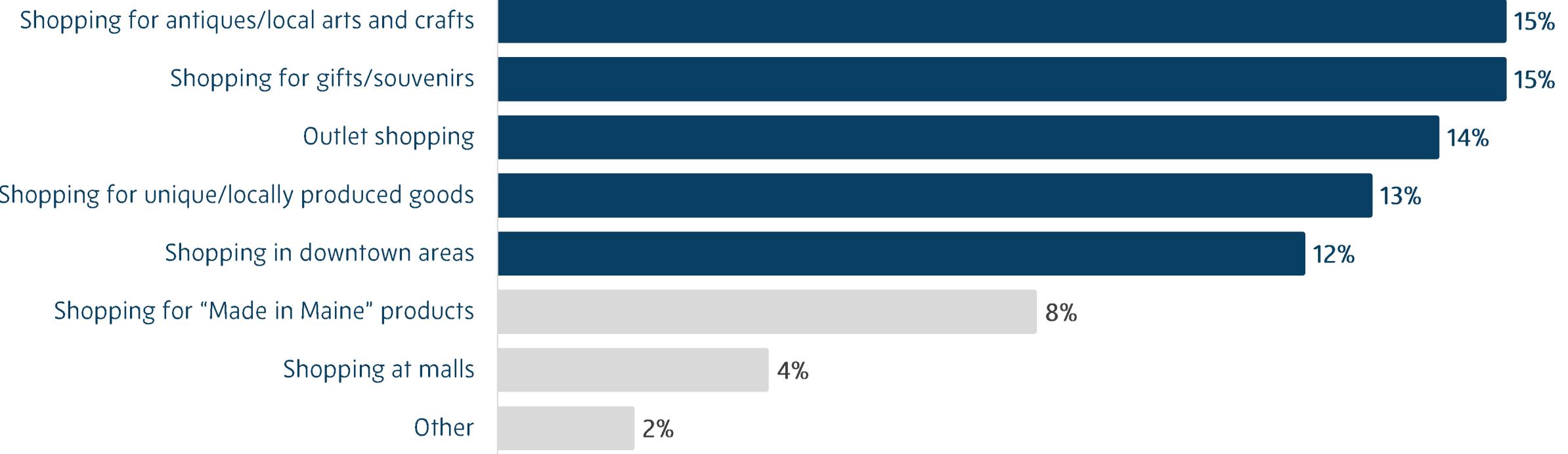
ACTIVE OUTDOOR ACTIVITIES*



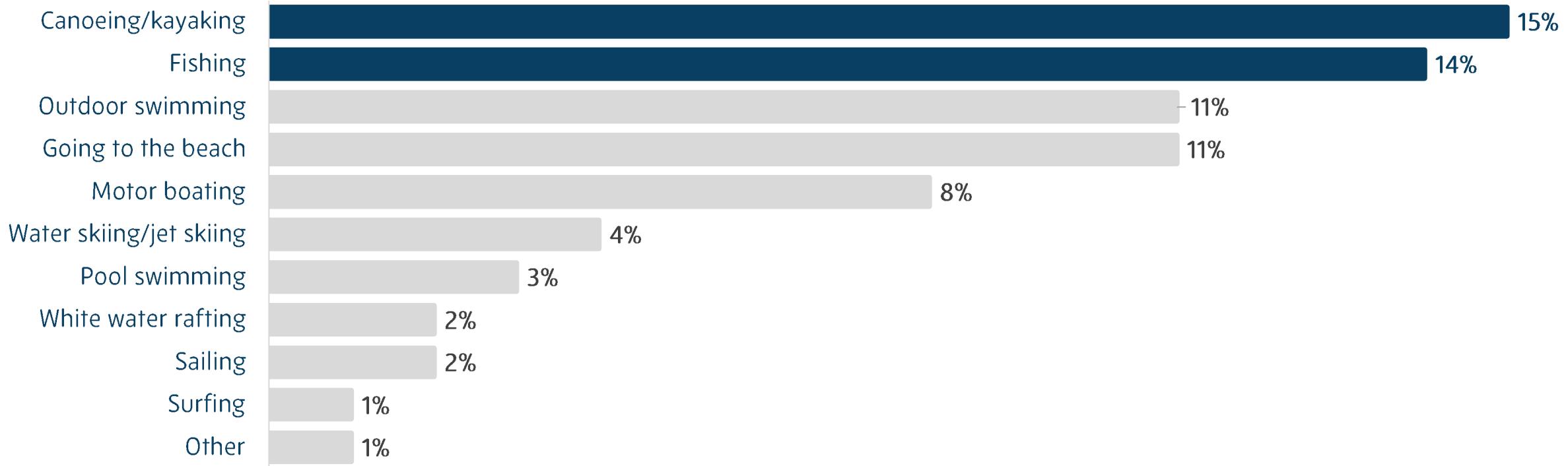
TOURING & SIGHTSEEING ACTIVITIES*



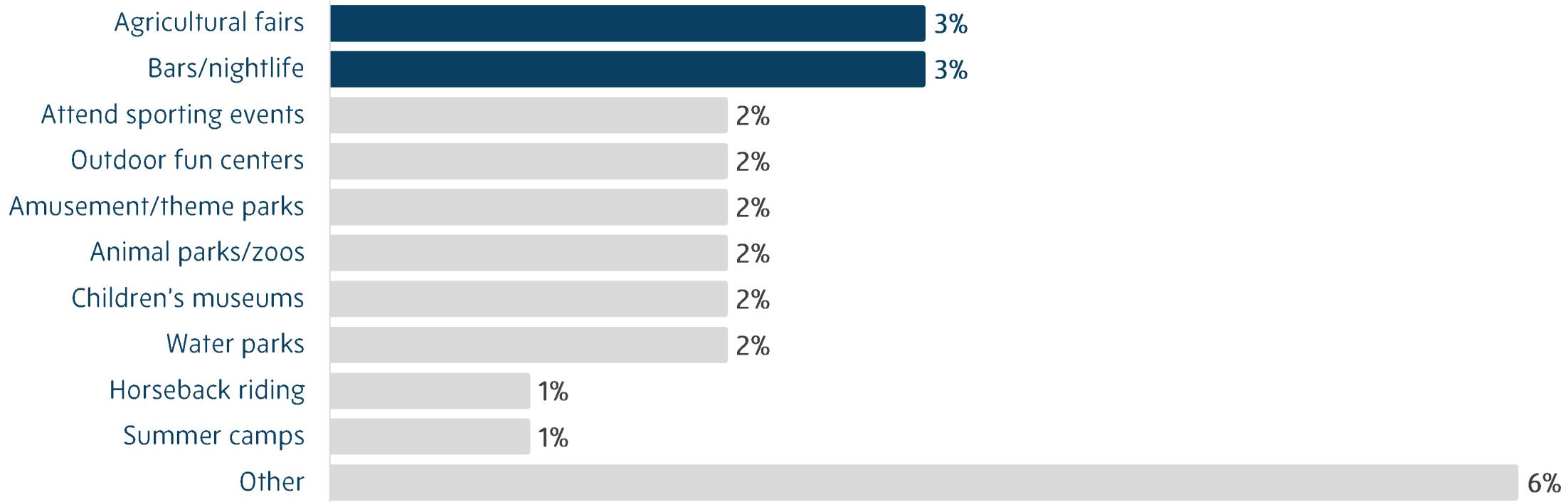
SHOPPING ACTIVITIES*



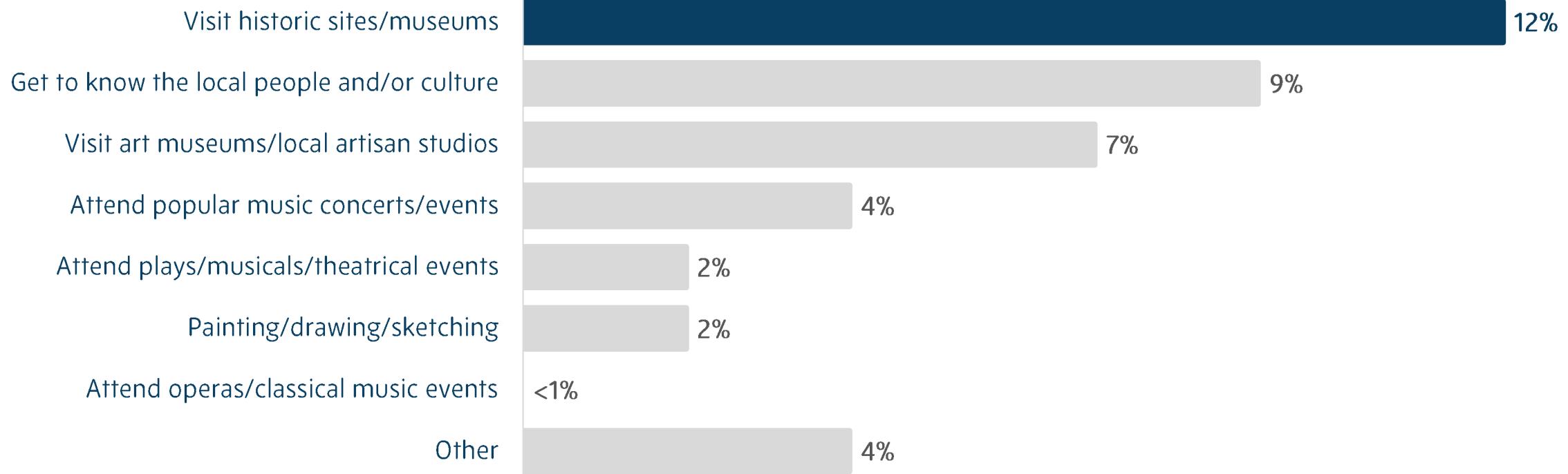
WATER ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

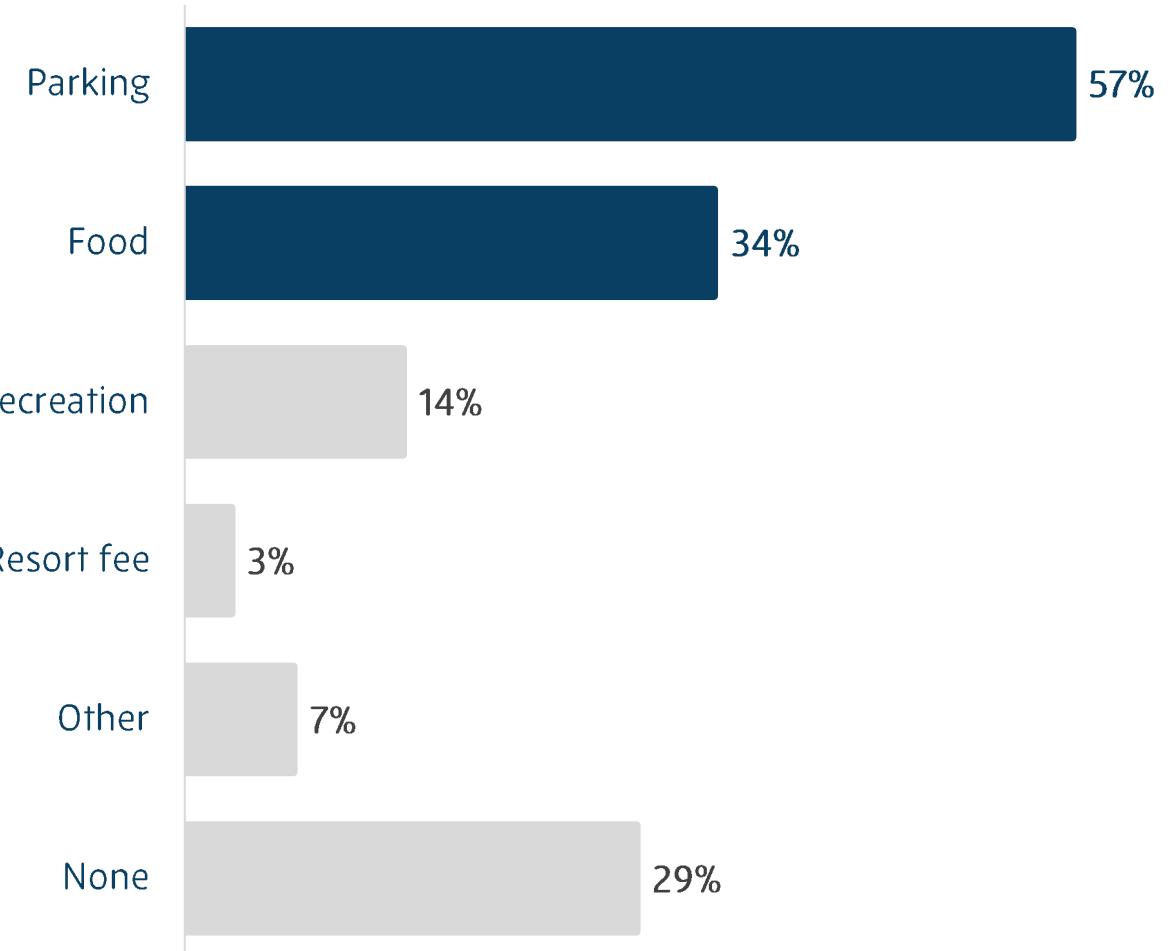
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$248	\$0	\$0
Transportation	\$49	\$40	\$38
Groceries	\$42	\$42	\$13
Restaurants	\$101	\$71	\$33
Shopping	\$83	\$72	\$28
Activities & Attractions	\$87	\$56	\$18
Other	\$32	\$23	\$3
Daily Spending	\$642	\$304	\$133

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,389	\$0	\$0
Transportation	\$274	\$268	\$38
Groceries	\$235	\$281	\$13
Restaurants	\$566	\$476	\$33
Shopping	\$465	\$482	\$28
Activities & Attractions	\$487	\$375	\$18
Other	\$179	\$154	\$3
Total Spending	\$3,595	\$2,037	\$133

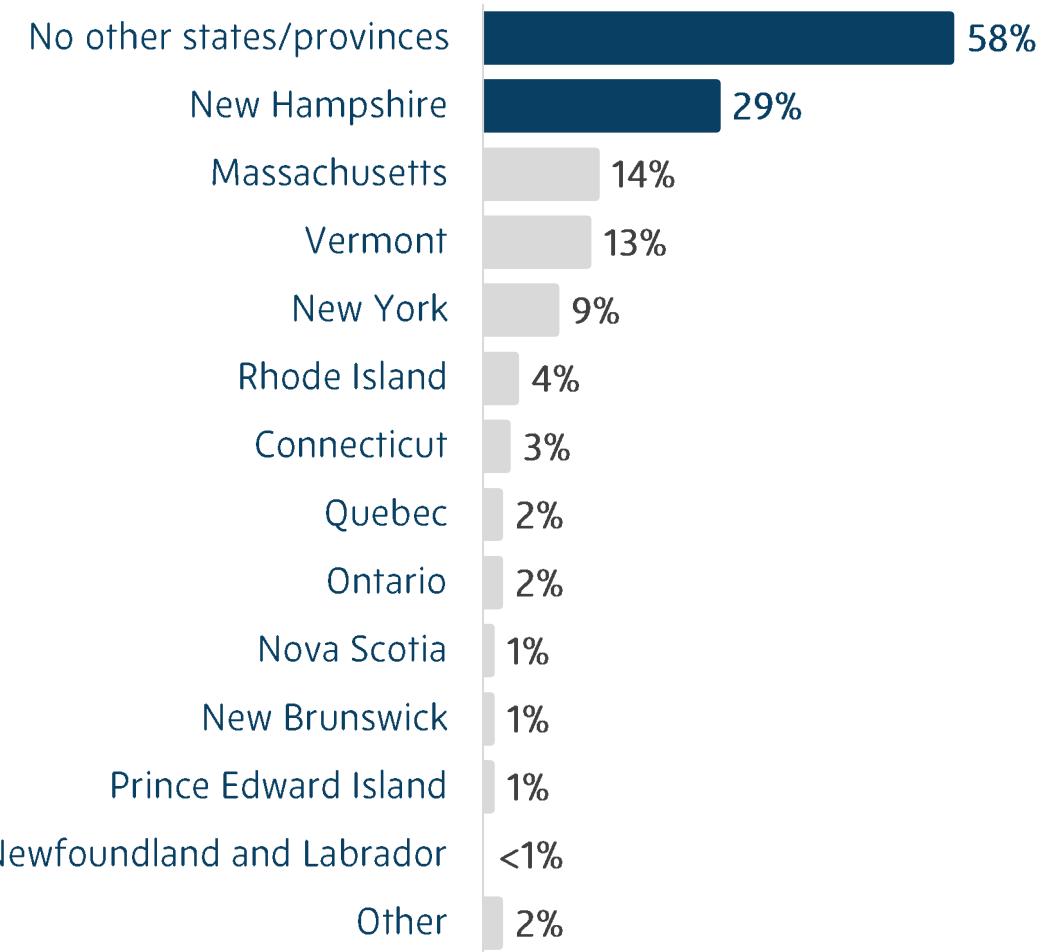
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for **7 in 10** visitors
- » Price for accommodations included parking for nearly **3 in 5** visitors
- » Food was included in accommodations' pricing for over **1 in 3** visitors



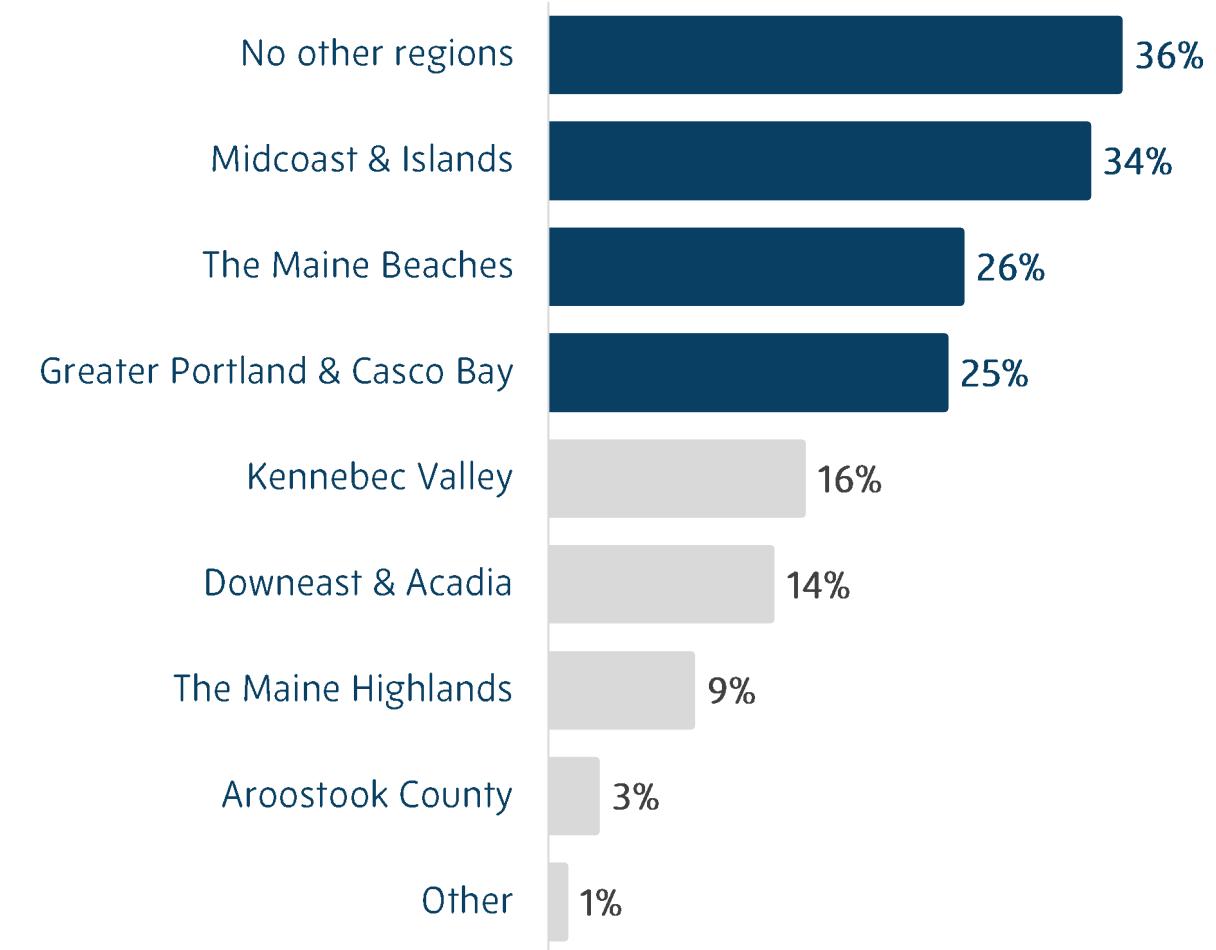
OTHER STATES & PROVINCES VISITED*

- » Nearly 3 in 5 visitors did not visit any other U.S. state or Canadian province during their trip
- » Nearly 3 in 10 visitors also visited 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 (+8% points from 2022)
- » Around **1 in 3** visitors visited the Midcoast & Islands in addition to their primary destination within Maine



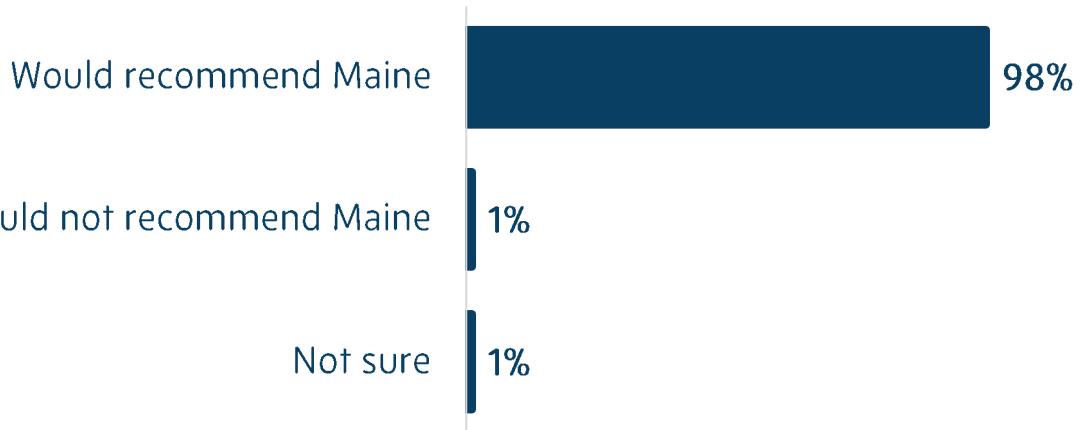
VISITOR JOURNEY : POST-TRIP EVALUATION



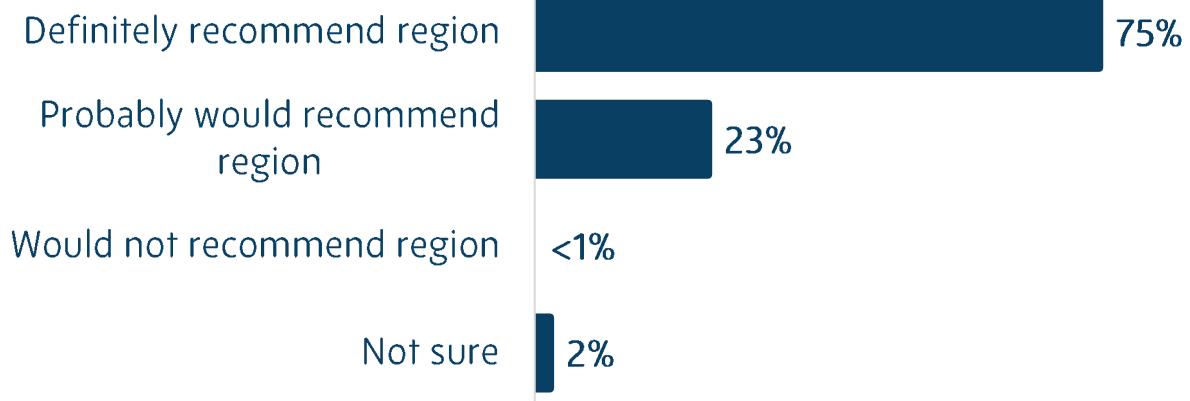
RECOMMENDING MAINE & ITS REGIONS

- » 98% of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » 98% of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – 75% would definitely recommend

Likelihood of Recommending Maine



Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

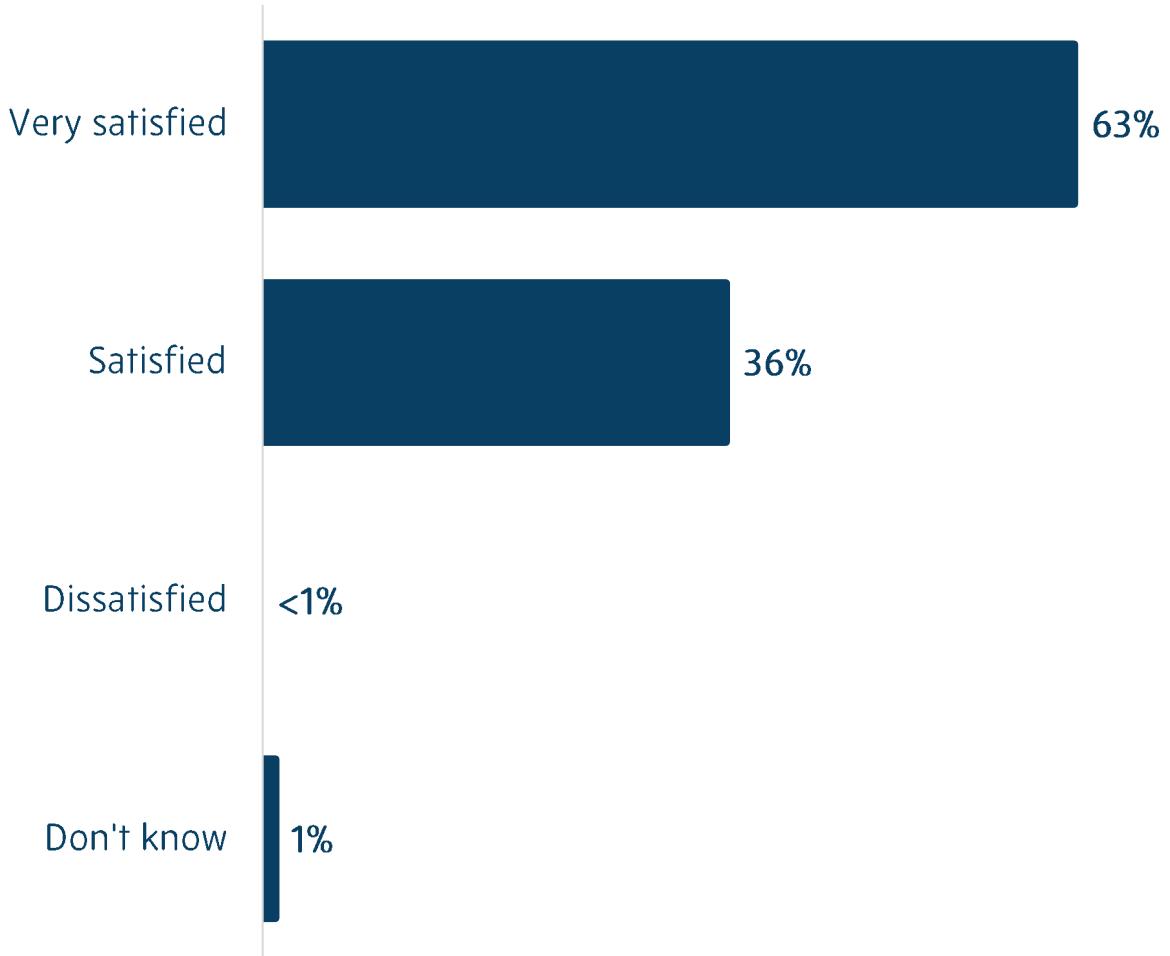
» 91% of visitors will return to Maine for a future visit or vacation



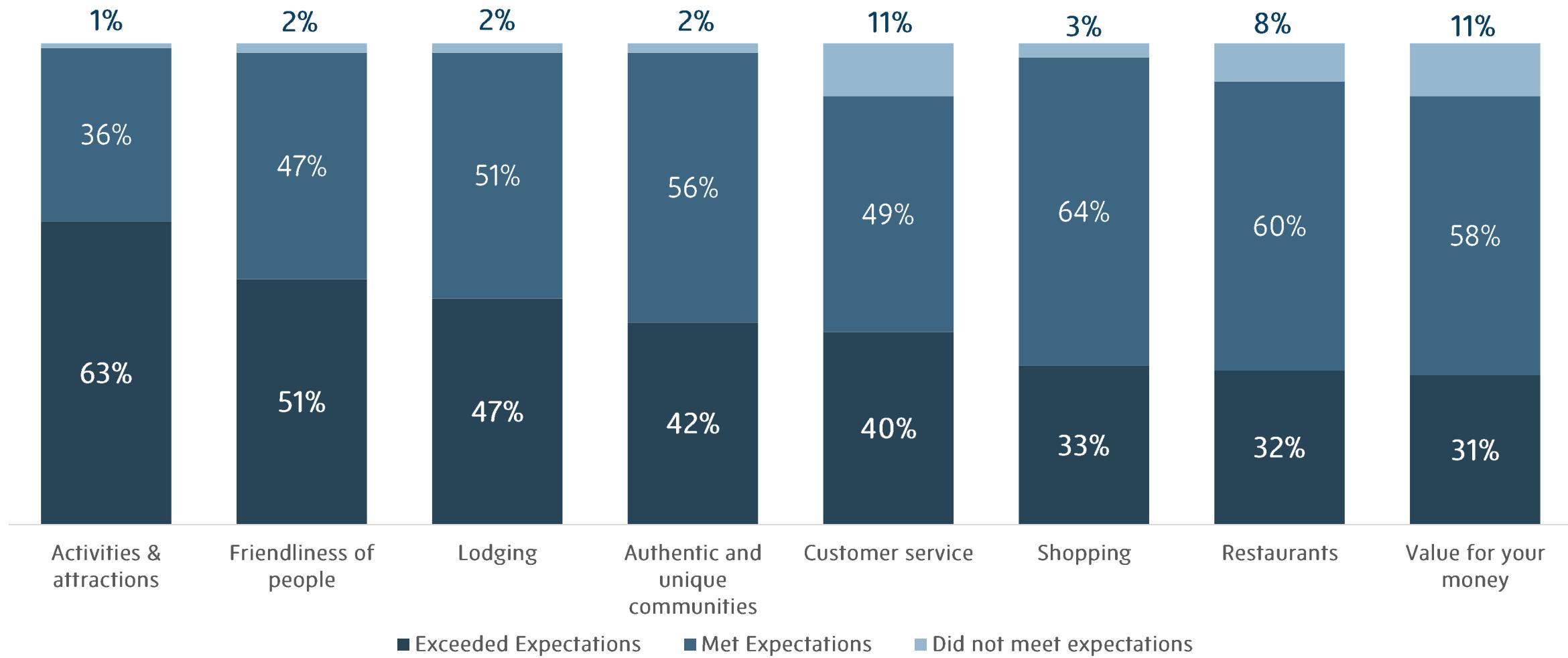
*9% of all visitors are not sure or will probably not return to Maine for the following reasons:
1. Prefer a variety of destinations 2. Traffic/difficult drive.

SATISFACTION

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



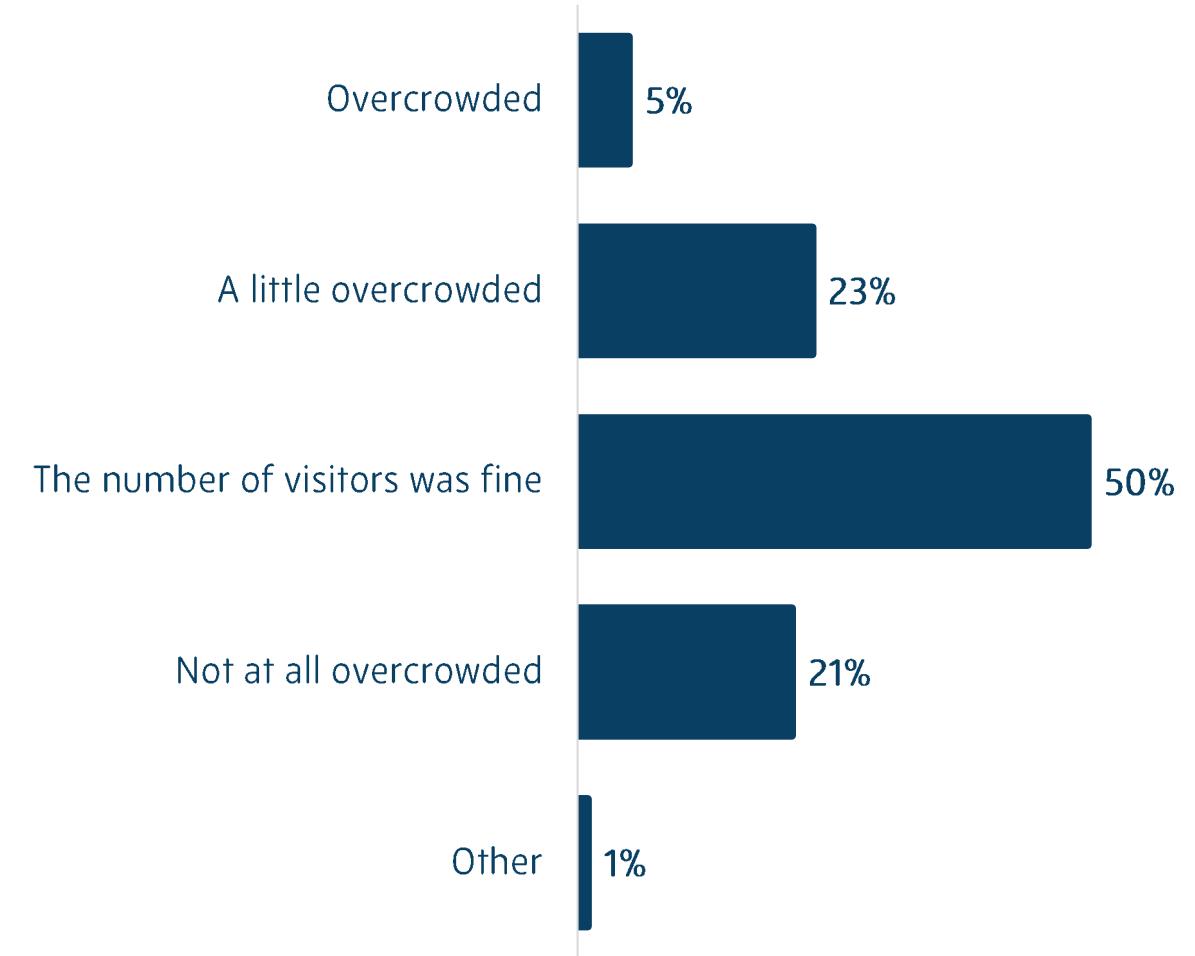
TRIP RATINGS



OVERCROWDING

» 50% of visitors thought the number of visitors during their trip to Maine was fine

» 23% of visitors thought it was a little overcrowded (-7% points from 2022)



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	17%	15%
2 - 3 weeks	14%	12%
1 - 2 months	25%	27%
3 - 4 months	15%	16%
5 - 6 months	12%	14%
7 months - 1 year	12%	12%
More than 1 year	5%	4%
Days in Planning Cycle	53	56
Booking Window	2022	2023
A week or less	21%	22%
2 - 3 weeks	15%	12%
1 - 2 months	25%	27%
3 - 4 months	15%	14%
5 - 6 months	11%	12%
7 months - 1 year	10%	10%
More than 1 year	3%	3%
Days in Booking Window	47	48

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2022	2023
Online search engines	35%	33%
Facebook	11%	17%
VisitMaine.com	21%	16%
Hotel websites	14%	14%
Visit Maine social media	10%	14%
Online travel agency	11%	14%
Instagram	11%	13%
YouTube	11%	13%
TripAdvisor	13%	12%
Traveler reviews/blogs/stories	16%	12%
Airbnb	9%	9%
MaineLakesandMountains.com	12%	9%
VRBO/HomeAway	5%	7%
MaineTourism.com	8%	6%
DiscoverNewEngland.com	5%	4%
DowneastAcadia.com	6%	4%
TheMaineBeaches.com	5%	4%
Airline websites	4%	3%
Vacation rental websites	5%	3%
MainesMidCoast.com	3%	2%
VisitPortland.com	2%	2%
Twitter	3%	2%
KennebecValley.org	3%	1%
TheMaineHighlands.com	2%	1%
VisitBarHarbor.com	2%	1%
VisitAroostook.com	1%	<1%
Other	9%	7%
None	27%	31%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2022	2023
Advice from friends/family	38%	40%
Articles or travelogues	23%	22%
AAA	22%	18%
Travel planning apps	13%	11%
Travel guides/brochures	10%	9%
Travel books & magazines	7%	6%
Called the Maine Office of Tourism	7%	5%
Visitor Guide	5%	5%
Visit Maine e-newsletter	5%	3%
Called local convention and visitors bureaus	3%	2%
Called local Chambers of Commerce	3%	2%
Called another Maine Tourism/Lodging Association	3%	2%
Travel agent	3%	2%
Other	6%	5%
None	37%	38%

REASON FOR VISITING*

Reasons for Visiting	2022	2023
Visiting friends/relatives	21%	30%
Relax and unwind	27%	29%
Sightseeing/touring	33%	25%
Nature & bird watching	25%	23%
Active outdoor activities	13%	15%
Special event	7%	12%
Special occasion	8%	9%
Water activities	9%	8%
Attractions	8%	7%
Snow activities	8%	7%
Shopping	6%	6%
Beach	6%	5%
Sporting event	1%	5%
Culture/museums/history	4%	4%
Conference/meeting	4%	3%
Astrotourism	1%	1%
Other	10%	10%

*Multiple responses permitted.

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TV SHOWS & FILM*

Trip Inspiration From Film	2022	2023
Yes	NA	7%
No	NA	93%
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	43%
Seeing Maine in a film or TV show made me think about Maine as a place to visit	NA	17%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	NA	17%
Visiting a location related to a TV show or film was the main reason I visited Maine	NA	13%
Something else	NA	10%
Visited TV or Film Attractions***	2022	2023
Yes	NA	10%
No	NA	88%
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.

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RESEARCH

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2022	2023
No other states/provinces	54%	54%
New Hampshire	31%	32%
Vermont	21%	18%
Massachusetts	16%	14%
New York	13%	10%
Rhode Island	7%	5%
Connecticut	6%	4%
Ontario	3%	3%
Quebec	2%	3%
Nova Scotia	2%	2%
Prince Edward Island	3%	2%
New Brunswick	2%	1%
Newfoundland and Labrador	2%	1%
Other	1%	1%

*Multiple responses permitted.

ADVERTISING/PROMOTIONS

Recalled Advertising	2022	2023
Yes	49%	53%
No	37%	34%
Not sure	14%	13%
Influenced by Advertising	2022	2023
Yes	32%	32%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recall*	2022	2023
Social media	44%	54%
Internet	42%	38%
Magazine	18%	23%
AAA	16%	18%
VisitMaine.com	14%	14%
Cable or satellite television	11%	14%
Traveler reviews/blogs	12%	11%
Radio	12%	10%
Maine travel/visitor guide	8%	7%
Online streaming service	7%	7%
Brochure	7%	7%
Newspaper	9%	7%
Music/podcast streaming	5%	4%
Deal – based promotion	4%	2%
Billboard	5%	2%
Other	8%	6%
Not sure	1%	2%

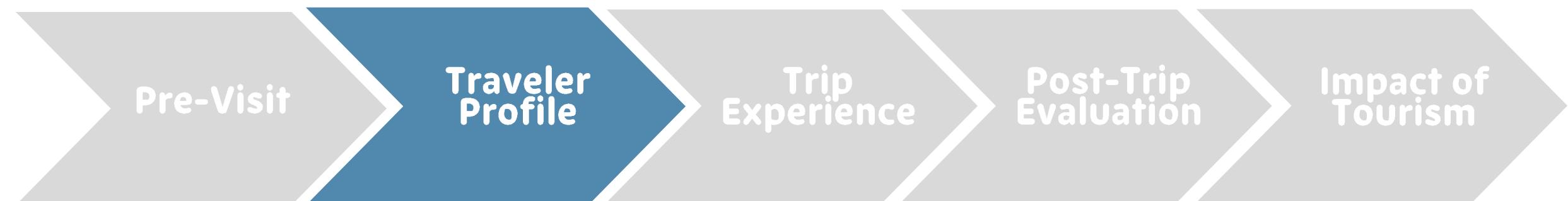
*Multiple responses permitted.

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VISITOR JOURNEY : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2022	2023
Maine	23%	23%
New England	27%	32%
Mid-Atlantic	22%	19%
Southeast	8%	8%
Southwest	3%	2%
Midwest	7%	6%
West	4%	3%
Canada	4%	4%
International	2%	3%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2022	2023
Maine	23%	23%
Massachusetts	12%	15%
New York	10%	9%
New Hampshire	7%	7%
Vermont	3%	5%
Connecticut	4%	4%
Florida	4%	4%
Pennsylvania	5%	4%
New Jersey	3%	3%
California	1%	2%
Ohio	2%	2%
Virginia	2%	2%
Ontario	3%	2%

ORIGIN MARKET

Origin Markets	2022	2023
Boston	9%	11%
New York City ¹	9%	8%
Portland	4%	5%
Auburn - Lewiston	2%	2%
Augusta	2%	2%
Philadelphia	4%	2%
Washington DC - Baltimore ²	3%	2%

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

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

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TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2022	2023
As a couple	48%	45%
As a family	26%	27%
Traveled alone	14%	14%
With other couples/friends	10%	12%
With business associates	1%	1%
In a tour group	1%	1%
Other	<1%	<1%
Average Travel Party Size	2.8	2.9

TRAVEL WITH CHILDREN*

Children in Travel Party*

2022

2023

No children	82%	81%
Children younger than 6	6%	6%
Children 6 – 12	10%	11%
Children 13 – 17	8%	10%

Gender

2022

2023

Male	47%	47%
Female	53%	53%

DEMOGRAPHIC PROFILE

Age	2022	2023
Under 25	6%	5%
25 – 34	18%	14%
35 – 44	24%	25%
45 – 54	21%	20%
55 – 65	21%	21%
Over 65	10%	15%
Median Age	46	48
Race/Ethnicity	2022	2023
White	89%	91%
Black	2%	2%
Asian	4%	2%
Hispanic	2%	2%
Indigenous	1%	1%
Other	2%	2%

LIFESTYLE PROFILE

Marital Status	2022	2023
Single/widowed	23%	21%
Married/living with partner	77%	79%
Employment Status	2022	2023
Employed full-time	55%	59%
Employed part-time	10%	9%
Contract/freelance/temporary employee	9%	8%
Retired	16%	17%
Not currently employed	7%	5%
Student	3%	2%

LIFESTYLE PROFILE

Household Income	2022	2023
Less than \$25,000	7%	5%
\$25,000 - \$49,999	11%	10%
\$50,000 - \$74,999	20%	22%
\$75,000 - \$99,999	21%	19%
\$100,000 - \$149,999	22%	21%
\$150,000 - \$199,999	11%	10%
\$200,000 - \$249,999	4%	6%
\$250,000 or more	4%	7%
Median Household Income	\$89,300	\$92,100

LIFESTYLE PROFILE

Educational Attainment	2022	2023
High school or less	8%	7%
Some college or technical school	13%	14%
College or technical school graduate	56%	57%
Graduate school	23%	22%

NEW & RETURNING VISITORS

Previous Trips to Maine

2022

2023

This is my first time	23%	17%
2 - 5 times	30%	28%
6 - 10 times	16%	19%
11+ times	31%	36%

VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2022	2023
Drove to Maine	83%	84%
Flew into Portland Intl Jetport	4%	5%
Flew into Boston Logan Intl	5%	3%
Took a motor coach tour or bus	2%	2%
Flew into Bangor Intl Airport	2%	1%
Flew into Presque Isle Airport	1%	1%
Flew into Manchester-Boston Regional Airport	1%	1%
Flew into another airport	1%	1%
Other	1%	2%

LENGTH OF STAY

Nights Stayed	2022	2023
Not staying overnight	28%	20%
1 night	3%	5%
2 nights	10%	13%
3 nights	14%	16%
4 nights	13%	14%
5+ nights	32%	32%
Average Length of Stay	4.6	5.1

ACCOMMODATIONS

Accommodations	2022	2023
Friends/family home	18%	22%
Not spending the night	28%	20%
Hotel/motel/resort	15%	17%
Personal second home	13%	17%
Vacation rental home	6%	8%
Campground/RV Park	9%	6%
Bed & Breakfast/Inn	3%	3%
Wilderness camping	4%	2%
Sporting camp/wilderness lodge	3%	1%
Outdoor Outfitter	<1%	<1%
Other	1%	4%

BOOKING

Booking Methods	2022	2023
Directly with the hotel/condo	38%	35%
Online travel agency	23%	23%
Airbnb	12%	13%
Short term rental service	6%	8%
Vacation rental company	3%	3%
Group tour operator	1%	2%
Offline travel agent	1%	1%
Travel package provider	1%	1%
Other	15%	14%

IN-MARKET RESOURCES*

In-Market Resources	2022	2023
Navigation website/apps	42%	42%
Restaurant website/app	29%	32%
Personal social media	23%	25%
Materials from hotel/campground	18%	18%
Destination social media	14%	17%
Visitor Information Centers	18%	14%
VisitMaine.com	13%	12%
Trip planning app	11%	12%
Hotel/resort website/app	9%	9%
Booking website/app	6%	5%
Airline website/app	4%	3%
Chambers of Commerce	4%	3%
Other	4%	5%
None	33%	30%

Maine Lakes & Mountains

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*Multiple responses permitted.

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RESEARCH

ACTIVITIES*

Activities	2022	2023
Food/beverage/culinary	60%	62%
Active outdoor activities	47%	50%
Touring/sightseeing	47%	47%
Shopping	37%	35%
Water activities	30%	25%
Entertainment/attractions	18%	21%
History/culture	16%	20%
Astrotourism	9%	9%
Business conference/meeting	3%	3%
Other	5%	6%

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*Multiple responses permitted.

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FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2022	2023
Going to local brew pubs/craft breweries	28%	28%
Ate other local seafood	21%	20%
Ate lobster	23%	18%
Consumed other locally produced Maine foods	23%	18%
Enjoying local food at fairs/festivals	14%	14%
Enjoyed unique Maine food or beverages	16%	13%
Visited Farmer's Markets	12%	9%
Enjoyed high-end cuisine or five-star dining	10%	8%
Ate farm-to-table or organic cuisine	6%	5%
Other	6%	11%

Maine Lakes & Mountains

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*Multiple responses permitted.

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ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2022	2023
Hiking/climbing/backpacking	31%	29%
Exploring State and National Parks	15%	12%
Camping	9%	8%
Alpine skiing/snowboarding	9%	7%
Mountain/Fat Biking	5%	7%
Hunting	4%	5%
Bicycling touring	7%	4%
Riding all-terrain vehicles	5%	4%
Nordic skiing	4%	4%
Snowshoeing	4%	3%
Snowmobiling	5%	3%
Other	5%	10%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2022	2023
Sightseeing	36%	36%
Enjoying the mountain views	32%	33%
Enjoying the ocean views/rocky coast	32%	32%
Driving for pleasure	33%	30%
Wildlife viewing/bird watching	29%	26%
Photography	26%	25%
Tours of communities/local architecture	16%	16%
Nature cruises or tours	19%	15%
Viewing fall colors	20%	14%
Other	2%	2%

*Multiple responses permitted.

SHOPPING ACTIVITIES*

Shopping Activities	2022	2023
Shopping for gifts/souvenirs	15%	15%
Shopping for antiques/local arts and crafts	15%	15%
Outlet shopping	15%	14%
Shopping for unique/locally produced goods	19%	13%
Shopping in downtown areas	9%	12%
Shopping for "Made in Maine" products	8%	8%
Shopping at malls	12%	4%
Other	2%	2%

*Multiple responses permitted.

WATER ACTIVITIES*

Water Activities	2022	2023
Canoeing/kayaking	17%	15%
Fishing	15%	14%
Outdoor swimming	10%	11%
Going to the beach	11%	11%
Motor boating	9%	8%
Water skiing/jet skiing	4%	4%
Pool swimming	2%	3%
White water rafting	2%	2%
Sailing	2%	2%
Surfing	1%	1%
Other	1%	1%

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2022	2023
Agricultural fairs	5%	3%
Bars/nightlife	4%	3%
Amusement/theme parks	3%	2%
Animal parks/zoo	3%	2%
Children's museums	1%	2%
Outdoor fun centers	4%	2%
Water parks	2%	2%
Attend sporting events	1%	2%
Summer camps	2%	1%
Horseback riding	1%	1%
Other	7%	13%

Maine Lakes & Mountains

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*Multiple responses permitted.

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HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2022	2023
Visit historic sites/museums	11%	12%
Get to know the local people and/or culture	6%	9%
Visit art museums/local artisan studios	8%	7%
Attend popular music concerts/events	6%	4%
Attend plays/musicals/theatrical events	2%	2%
Painting/drawing/sketching	2%	2%
Attend operas/classical music events	1%	<1%
Other	<1%	4%

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2022	2023
No other states/provinces	57%	58%
New Hampshire	28%	29%
Massachusetts	16%	14%
Vermont	16%	13%
New York	10%	9%
Rhode Island	5%	4%
Connecticut	5%	3%
Ontario	3%	2%
Quebec	1%	2%
New Brunswick	1%	1%
Nova Scotia	1%	1%
Prince Edward Island	1%	1%
Newfoundland and Labrador	1%	<1%
Other	2%	2%

TRAVELING IN MAINE*

Maine Regions Visited	2022	2023
No other regions	28%	36%
Midcoast & Islands	31%	34%
The Maine Beaches	28%	26%
Greater Portland & Casco Bay	21%	25%
Kennebec Valley	15%	16%
Downeast & Acadia	22%	14%
The Maine Highlands	15%	9%
Aroostook County	6%	3%
Other	<1%	1%

Maine Lakes & Mountains

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*Multiple responses permitted.

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VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2022	2023
Would recommend Maine	98%	98%
Would not recommend Maine	1%	1%
Not sure	1%	1%

Recommending Regions	2022	2023
Definitely recommend region	88%	75%
Probably would recommend region	10%	23%
Would not recommend region	<1%	<1%
Not sure	2%	2%

RETURNING TO MAINE

Returning to Maine

2022

2023

Definitely will return	73%	71%
Probably will return	16%	20%
Probably will not return	<1%	<1%
Not sure	11%	9%

SATISFACTION

Satisfaction	2022	2023
Very satisfied	64%	63%
Satisfied	35%	36%
Dissatisfied	<1%	<1%
Don't know	1%	1%

TRIP EXPECTATIONS

Exceeded Expectations	2022	2023
Activities & attractions	59%	63%
Friendliness of people	51%	51%
Lodging	49%	47%
Authentic & unique communities	45%	42%
Customer service	38%	40%
Shopping	33%	33%
Restaurants	36%	32%
Value for your money	32%	31%

OVERCROWDING

Overcrowding	2022	2023
Overcrowded	8%	5%
A little overcrowded	30%	23%
The number of visitors was fine	49%	50%
Not at all overcrowded	11%	21%
Other	2%	1%

STUDY METHODS



METHODOLOGY



Visitor Tracking

473 interviews were completed with visitors to Maine Lakes & Mountains 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 Maine Lakes & Mountains is a function of direct spending by visitors to Maine Lakes & Mountains, 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 Maine Lakes & Mountains. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Maine Lakes & Mountains' multiplier is 1.56.

MAINE LAKES & MOUNTAINS

2023 Economic Impact & Visitor Tracking Report

DECEMBER 2022 – NOVEMBER 2023

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