

MAINE HIGHLANDS

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



MAINE HIGHLANDS

Compared to visitors to other regions, visitors to Maine Highlands region are more likely to:

- » Use airline websites to plan their trip to Maine
- » Not consider any other states or provinces while planning their trip
- » Travel alone
- » Fly into Bangor International Airport
- » Be very satisfied with their trip



VISITOR JOURNEY: IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,059,166,500

in economic impact to Maine Highlands' economy,
up 5.3% from 2022



DIRECT SPENDING

Visitors to Maine Highlands spent

\$654,941,700

throughout the county in 2023 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up 5.7% from 2022



VISITORS

Maine Highlands attracted
1,023,400
visitors in 2023, up 16.8% from 2022



VISITORS DAYS*

All visitors to Maine Highlands spent

6,233,700

days in Maine Highlands throughout 2023, up
6.6% 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.

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ROOM NIGHTS

Visitors to Maine Highlands generated

1,056,900

nights in Maine Highlands accommodations
throughout 2023, up 11.0% from 2022



JOBS SUPPORTED*

Visitors to Maine Highlands supported

9,100

jobs throughout the county in 2023, down
11.7% from 2022



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

Maine Highlands

WAGES GENERATED

Visitors to Maine Highlands supported

\$348,633,500

in wages paid to Maine Highlands employees
in 2023, up 2.8% from 2022



VISITORS & JOBS

Every
112

visitors supports a new job in Maine
Highlands



HOUSEHOLD SAVINGS

Visitors to Maine Highlands saved local households

\$1,405

in state and local taxes in 2023



LODGING METRICS*

Occupancy Rate

52.6%

+ 1.7% from 2022

Average Daily Rate

\$148.89

- 2.9% from 2022

Revenue per Available Room

\$78.26

- 1.3% 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.

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VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Traveler
Profile

Trip
Experience

Post-Trip
Evaluation

Impact of
Tourism

TRIP PLANNING CYCLE

- » **69%** 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*



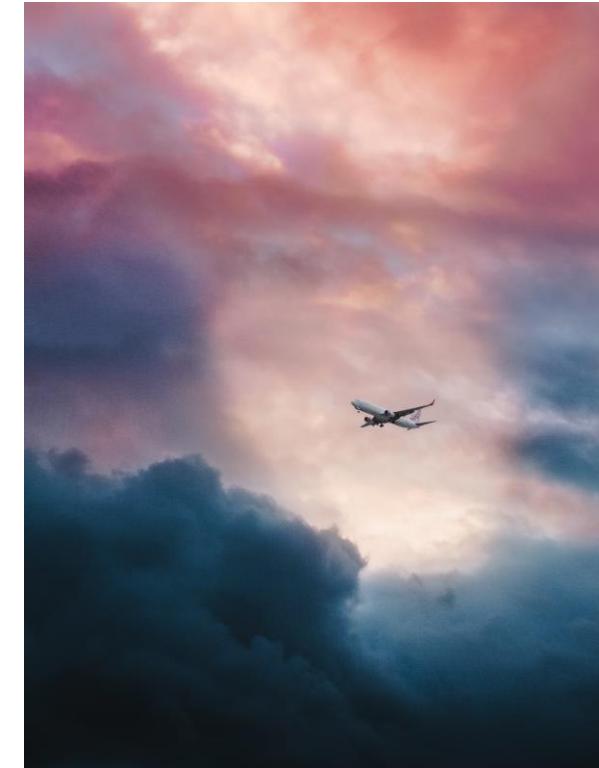
30% Advice from
family/friends



27% Online search
engines



17% Online travel agency



17% Airline websites

TOP REASONS FOR VISITING*



33% Visit friends/family



29% Relax and unwind



23% Sightseeing/touring

CONSIDERING MAINE AS A DESTINATION

- » Over 3 in 4 visitors considered visiting ONLY Maine 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*

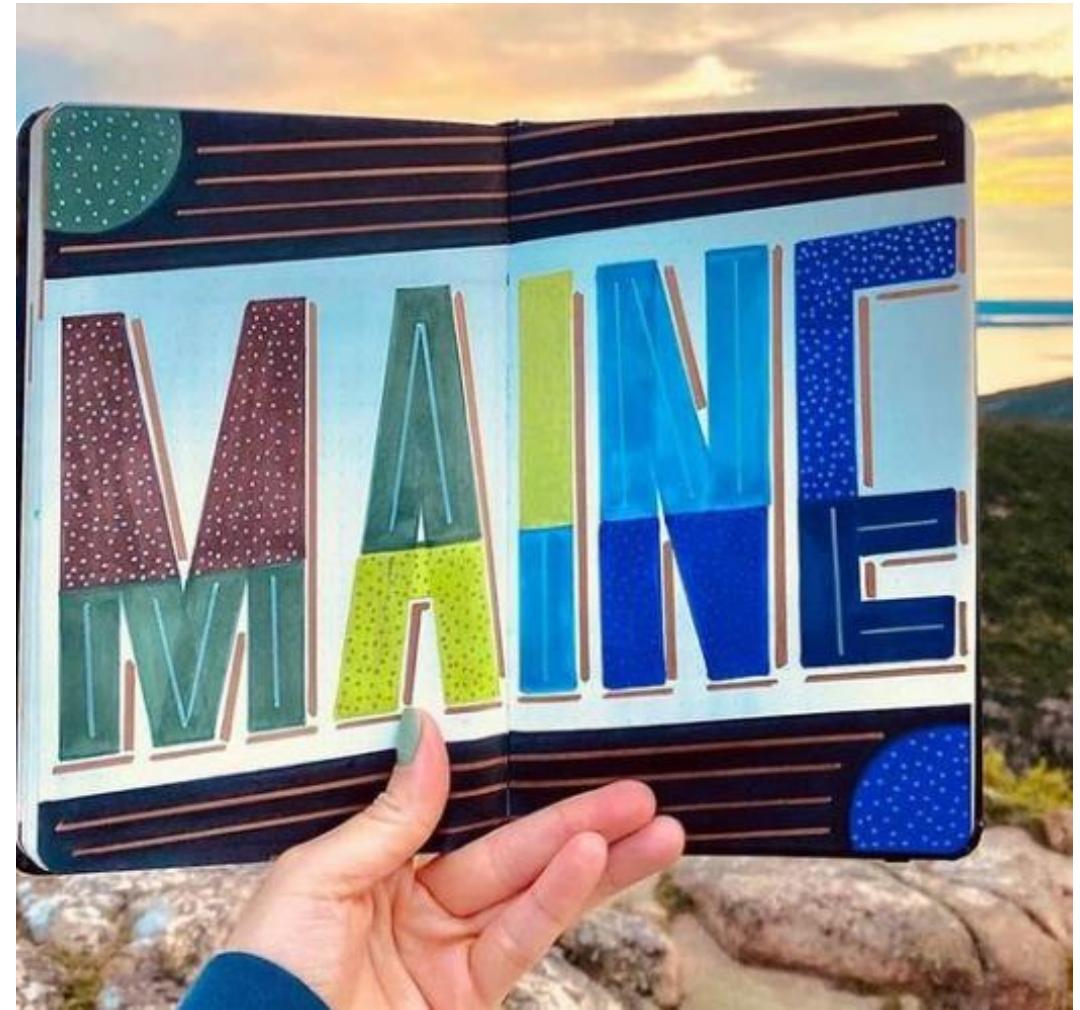
- » 4% of visitors said a TV show or film inspired their trip to Maine
- » 32% of visitors who were inspired by a TV show/film said it made them think about Maine as a place to visit or it was the deciding factor for visiting Maine



*Questions were not asked until January 2023.

PRE-TRIP RECALL OF ADVERTISING

- » Nearly **3 in 10** visitors recalled advertising or promotions for Maine prior to their trip (**-6%** points from 2022)
- » This information influenced **12%** of all visitors to visit Maine (**-5%** points from 2022)



TOP SOURCES OF ADVERTISING RECALL*

Base: 29% of visitors who recalled advertising



36% Social media

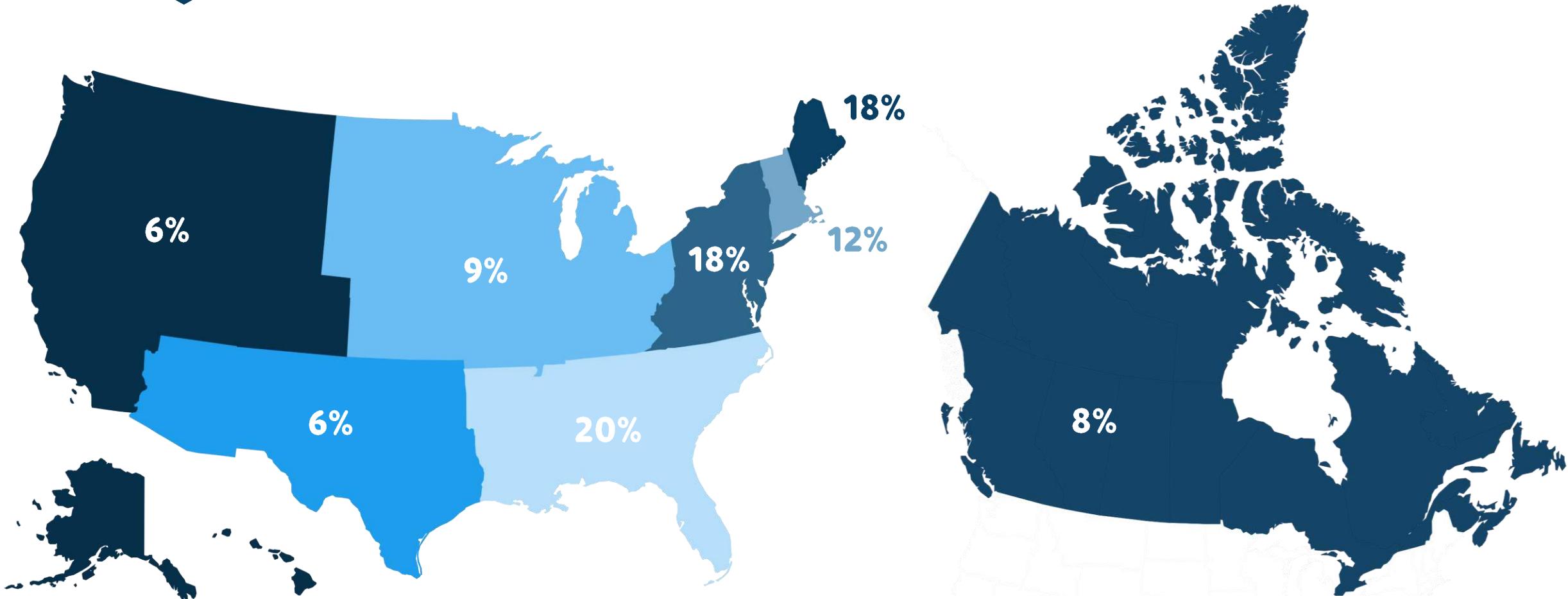


36% Internet

VISITOR JOURNEY: TRAVELER PROFILE



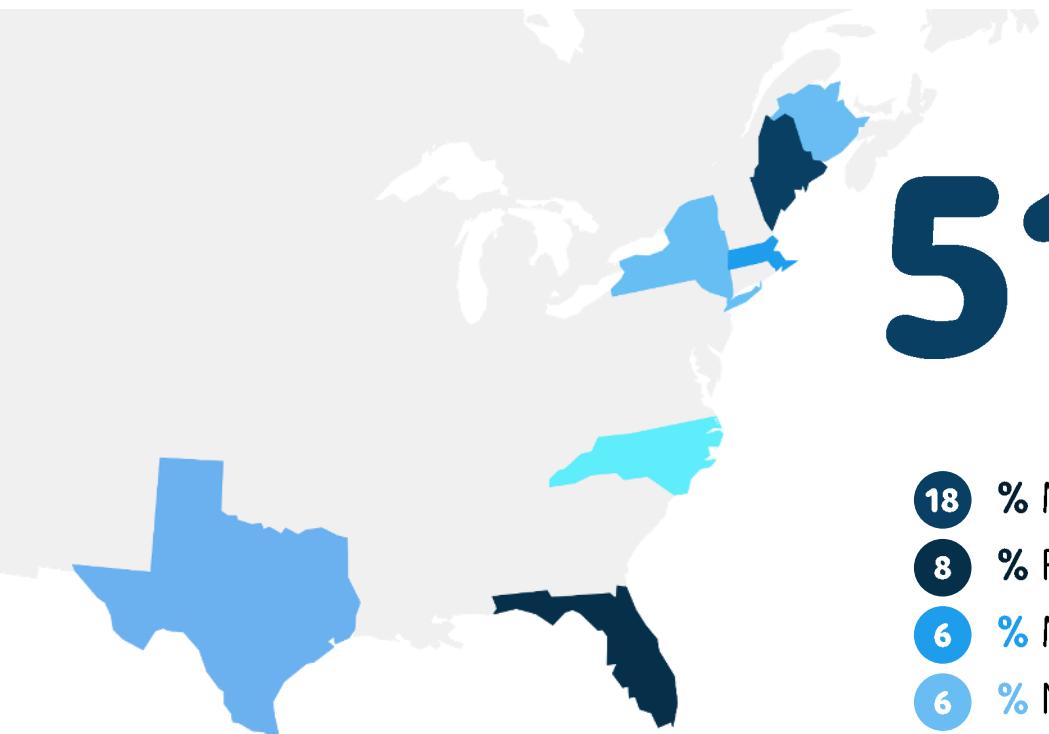
REGIONS OF ORIGIN



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

8% of visitors came from Canada.

TOP ORIGIN STATES & PROVINCES



51%

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

- 18 % Maine
- 8 % Florida
- 6 % Massachusetts
- 6 % New Brunswick

- 5 % Texas
- 4 % New York
- 4 % North Carolina

TOP ORIGIN MARKETS



6% New York City¹



5% Washington DC – Baltimore²

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

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

TRAVEL PARTIES

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



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



VISITOR PROFILE

- » The typical Maine visitor:
 - » Is **48** years old¹
 - » Is white – **87%**
 - » Is a college graduate – **72%**
 - » Is married/in a domestic partnership – **71%**
 - » Is employed full-time – **61%**
 - » Has an annual household income² of **\$104,500**



¹Median age.

²Median household income.

NEW & RETURNING VISITORS

- » 25% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 40% had previously traveled in Maine more than 10 times (+6% points from 2022)



VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

- » Maine is a drive-market for most visitors, with **78%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Bangor International Airport



NIGHTS STAYED

- » 84% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed **6.0*** nights in Maine on their trips



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

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33

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TOP ACCOMMODATIONS



29% Hotel/motel/resort



22% Friends/family home

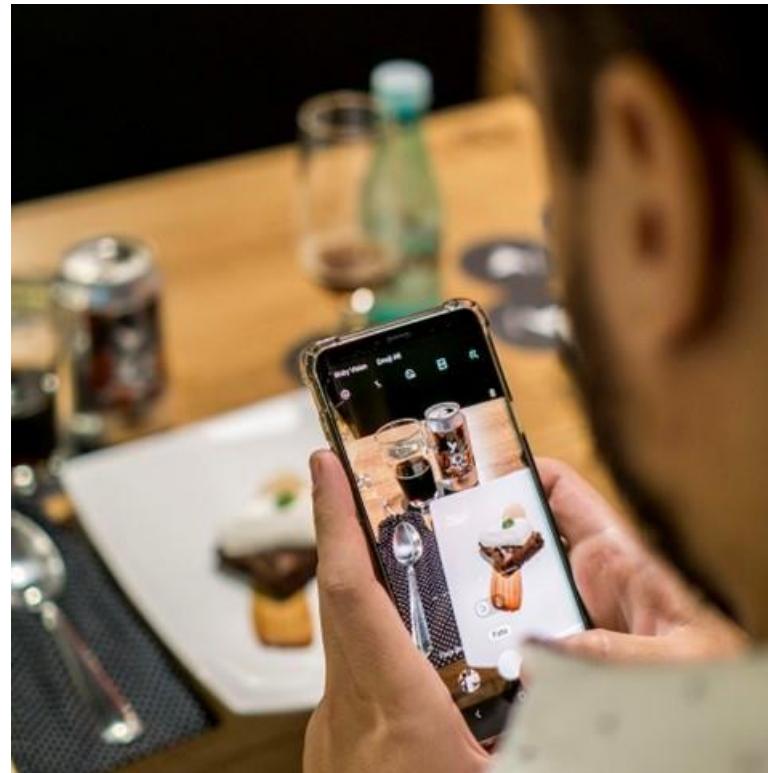


16% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*



31% Navigation website/apps



13% Restaurant website/app



13% Personal social media

TOP VISITOR ACTIVITIES*



63% Food/beverage/
culinary



45% Touring/sightseeing



40% Active outdoor
activities



39% Shopping

VISITING OTHER STATES & PROVINCES

- » Over **3 in 4** visitors did not visit any other U.S. state or Canadian province during their trip



TRAVELING WITHIN MAINE

- » Over **1 in 3** visitors visited DownEast & Acadia in addition to their primary destination within Maine
- » Over **2 in 5** visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (**+12%** points from 2022)



VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **96%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » **87%** 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

- » **95%** of visitors will return to Maine for a future visit or vacation
- » **78%** of visitors were highly satisfied with their trip in Maine and will “definitely return” in the future



SATISFACTION

- » 98% of visitors were satisfied with their trip to Maine
- » Nearly **4 in 5** visitors were very satisfied with their trip to Maine (+7% points from 2022)



OVERCROWDING

- » 48% of visitors thought the number of visitors during their trip to Maine was fine
- » 12% 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	907,200	876,000	1,023,400	+ 16.8%
Visitor Days*	NA	5,845,700	6,233,700	+ 6.6%
Room nights generated	755,800	952,000	1,056,900	+ 11.0%
Direct expenditures	\$538,820,900	\$619,720,700	\$654,941,700	+ 5.7%
Total economic impact	\$878,932,700	\$1,006,035,200	\$1,059,166,500	+ 5.3%

*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

Maine Highlands Jobs	2021	2022	2023	Δ% from '22
Jobs supported (direct)	7,100	7,700	6,900	- 10.4%
Total jobs supported	9,400	10,300	9,100	- 11.7%*

Maine Highlands Wages	2021	2022	2023	Δ% from '22
Wages paid (direct)	\$195,111,700	\$223,940,200	\$232,491,900	+ 3.8%
Total wages paid	\$296,048,200	\$339,192,700	\$348,633,500	+ 2.8%

*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.

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47

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RETURN ON INVESTMENT

Return on Investment	2021	2022	2023
Visitors per job supported	97	85	112
State & local taxes supported	\$75,152,700	\$83,945,900	\$100,239,400
Tax savings per household	\$1,086	\$1,199	\$1,405

LODGING METRICS*

Lodging Metrics	2021	2022	2023	Δ% from '22
Occupancy Rate (%)	43.3%	51.7%	52.6%	+ 1.7%
Average Daily Rate	\$138.36	\$153.34	\$148.89	- 2.9%
RevPAR	\$59.91	\$79.28	\$78.26	- 1.3%
Total Lodging Revenue**	\$115,576,100	\$156,182,300	\$158,432,000	+ 1.4%

*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

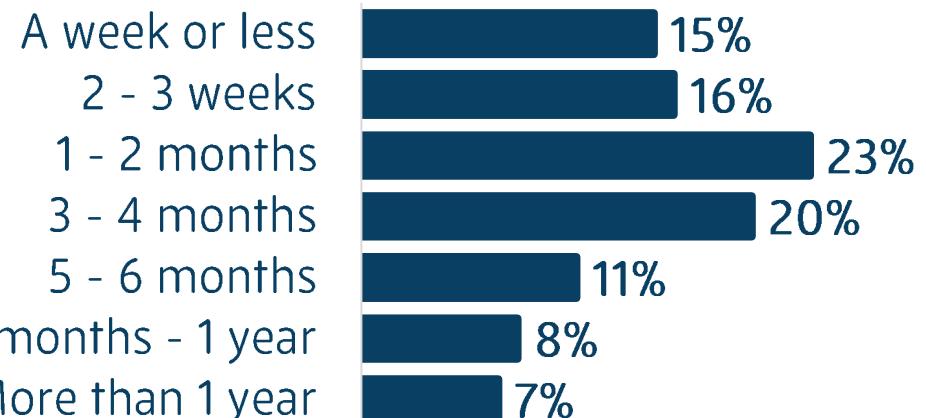
Post-Trip
Evaluation

Impact of
Tourism

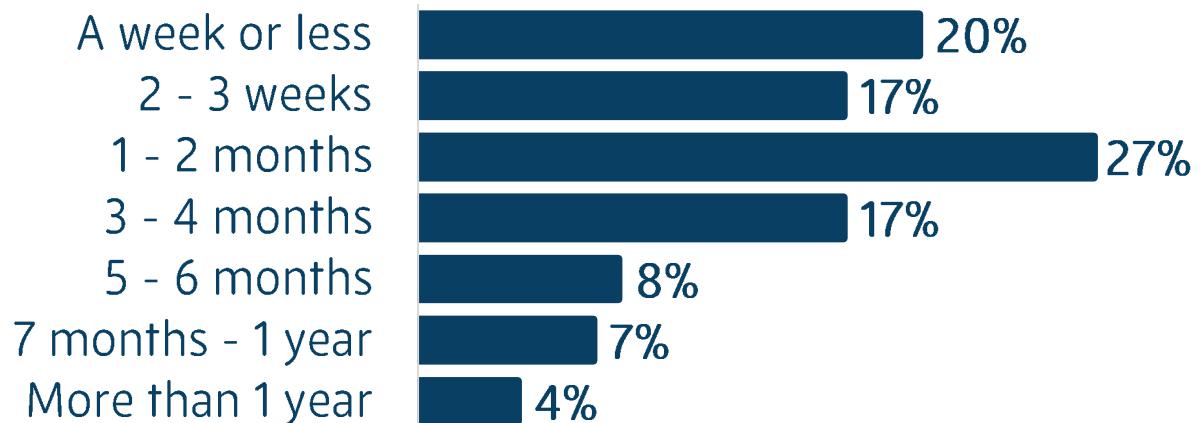
TRIP PLANNING CYCLE

- » Typical visitors began planning their trip **55 days** in advance (no change from 2022)
- » **69%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **44 days** in advance (+2 days from 2022)
- » **64%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

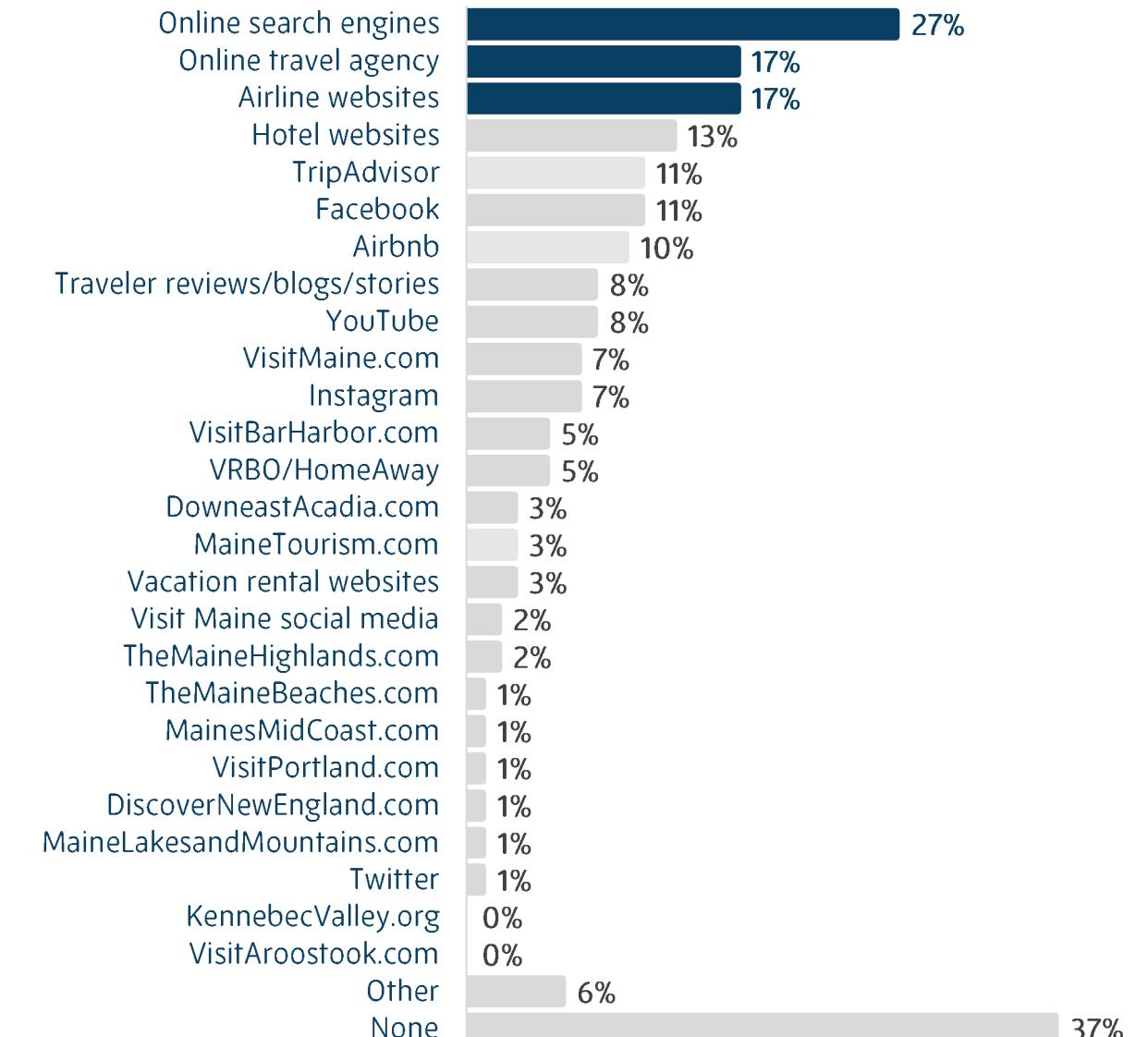


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

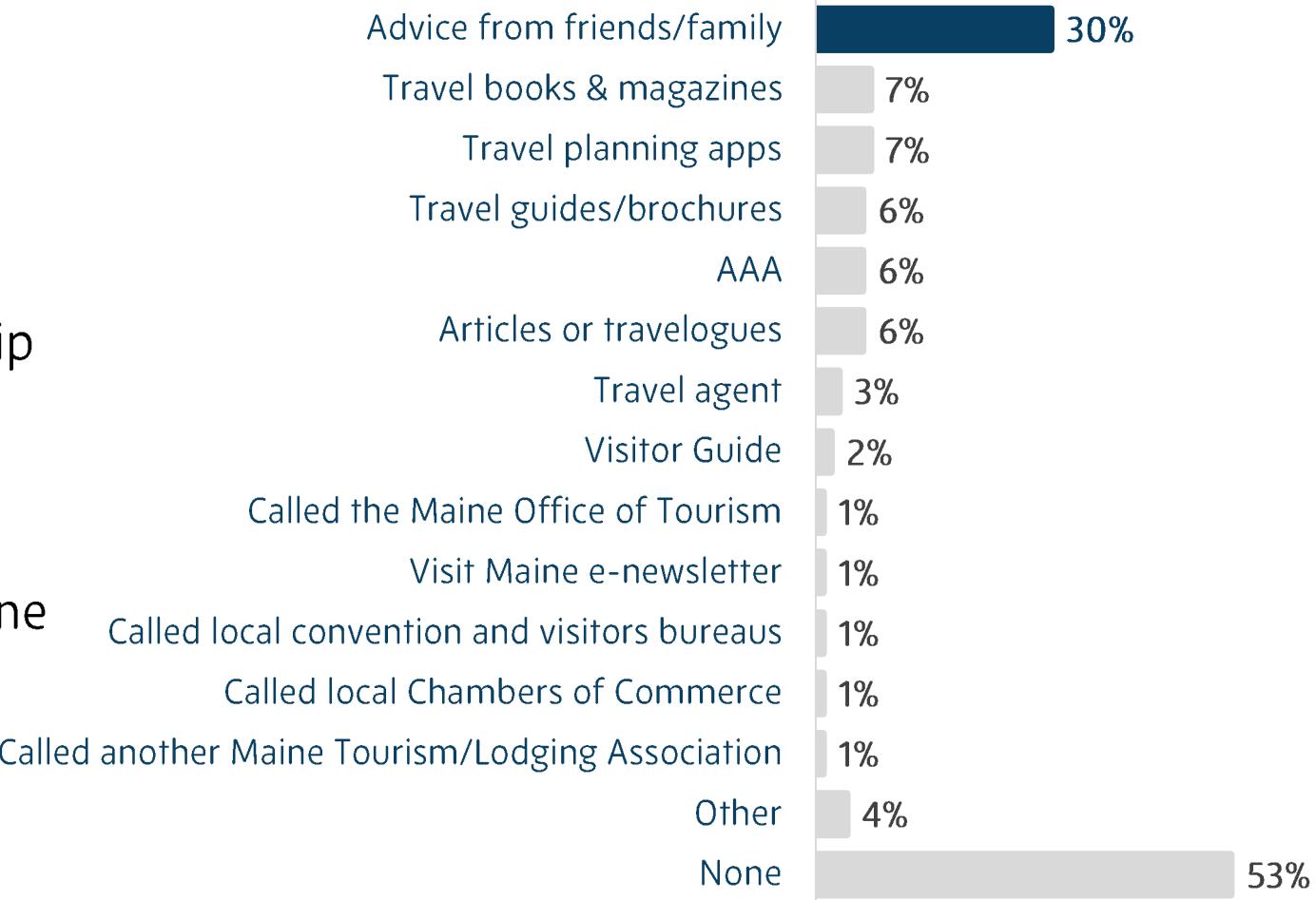
- » Nearly 2 in 3 visitors used one or more online resources to help them plan their trip in Maine
- » Over 1 in 4 visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » Over 1 in 6 visitors used an online travel agency or an airline website to help them plan their trip in Maine



*Multiple responses permitted.

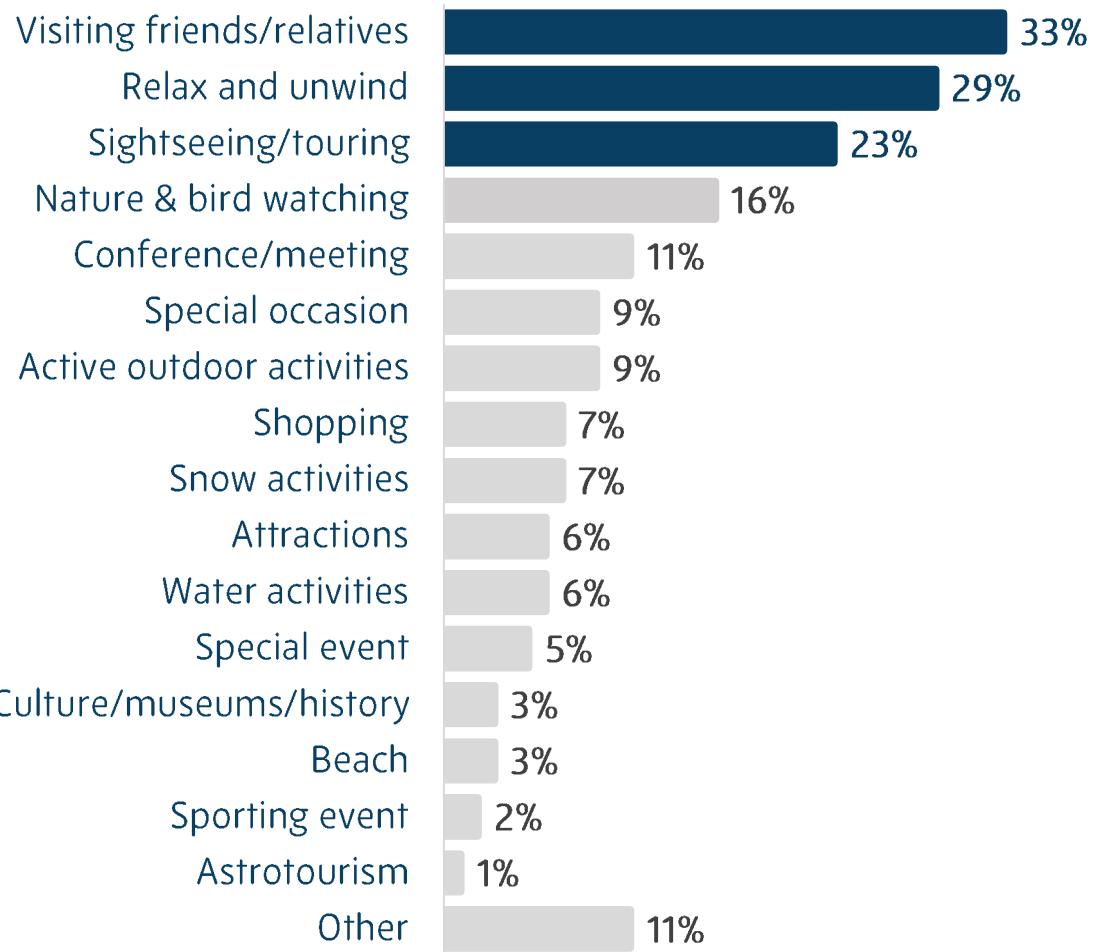
OTHER TRIP PLANNING SOURCES*

- » **3 in 10** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » Over **half** of visitors did not use any other resources to help them plan their trip in Maine



REASONS FOR VISITING*

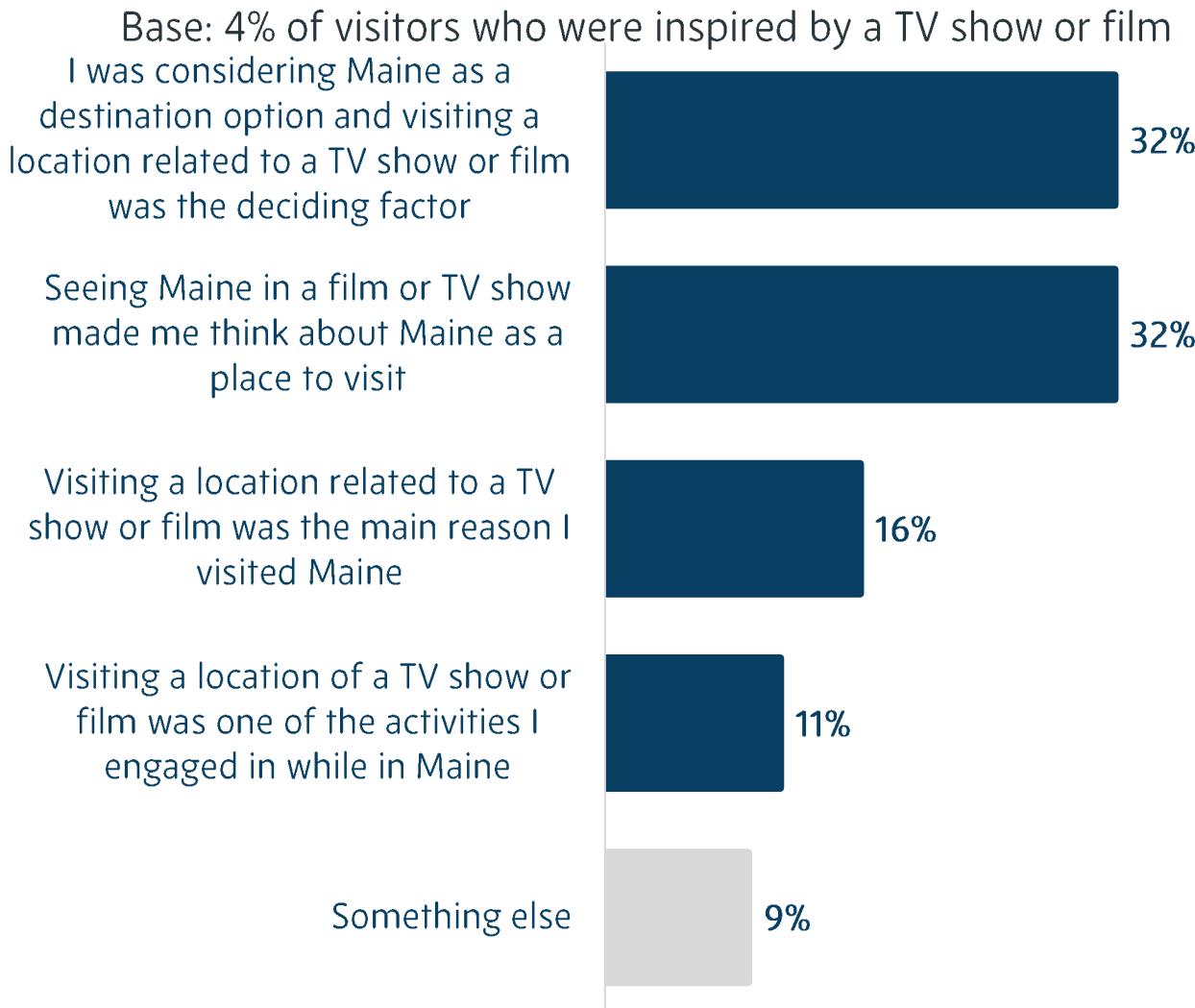
- » **1 in 3** visitors came to Maine to visit friends/relatives
- » Nearly **3 in 10** visitors came to Maine to relax and unwind
- » Nearly **1 in 4** visitors came to Maine for sightseeing and touring



*Multiple responses permitted.

TV SHOWS & FILM*

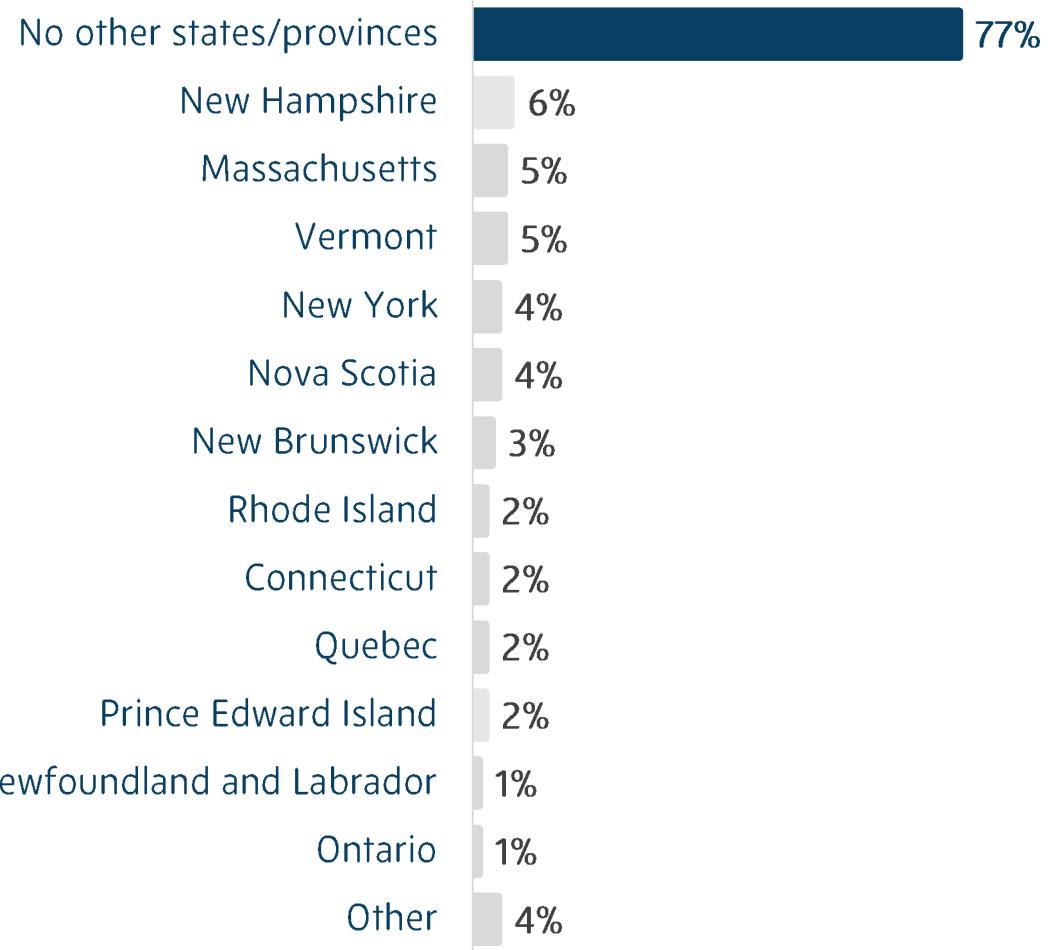
- » **4%** of visitors said a TV show or film inspired their trip to Maine
- » Nearly **1 in 3** visitors who were inspired by a TV show or film said it made them think about Maine as a place to visit or it was the deciding factor for visiting Maine
- » **3%** of visitors who were NOT inspired by a TV show or film to visit Maine said they visited the location of a TV show or film while in Maine



*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

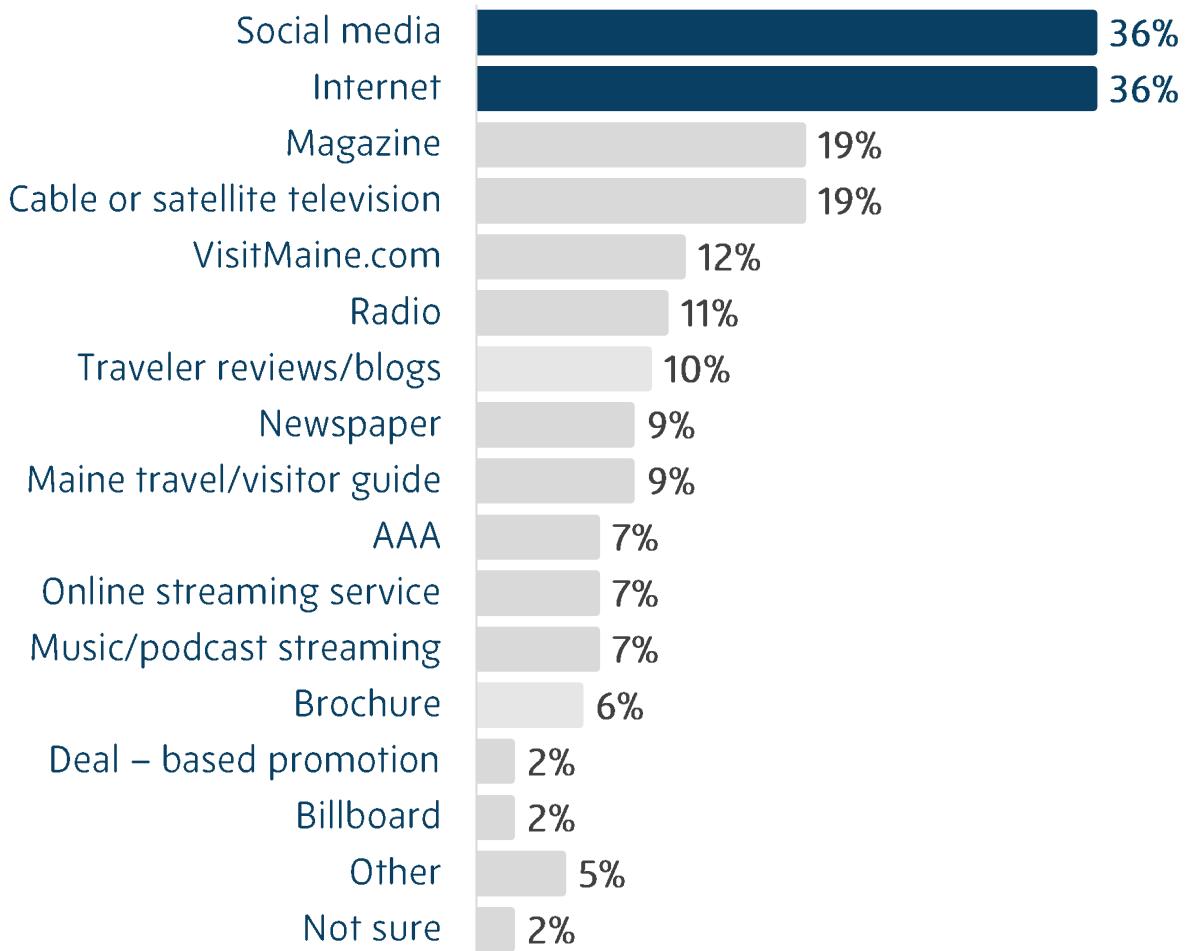
» Over 3 in 4 visitors considered visiting ONLY Maine while planning their trips



PRE-TRIP RECALL OF ADVERTISING*

- » Nearly **3 in 10** visitors recalled advertising or promotions for Maine prior to their trip (-6% points from 2022)
- » Visitors who recalled this advertising primarily saw it on the social media or the Internet
- » This information influenced **12% of all** visitors to visit Maine (-5% points from 2022)

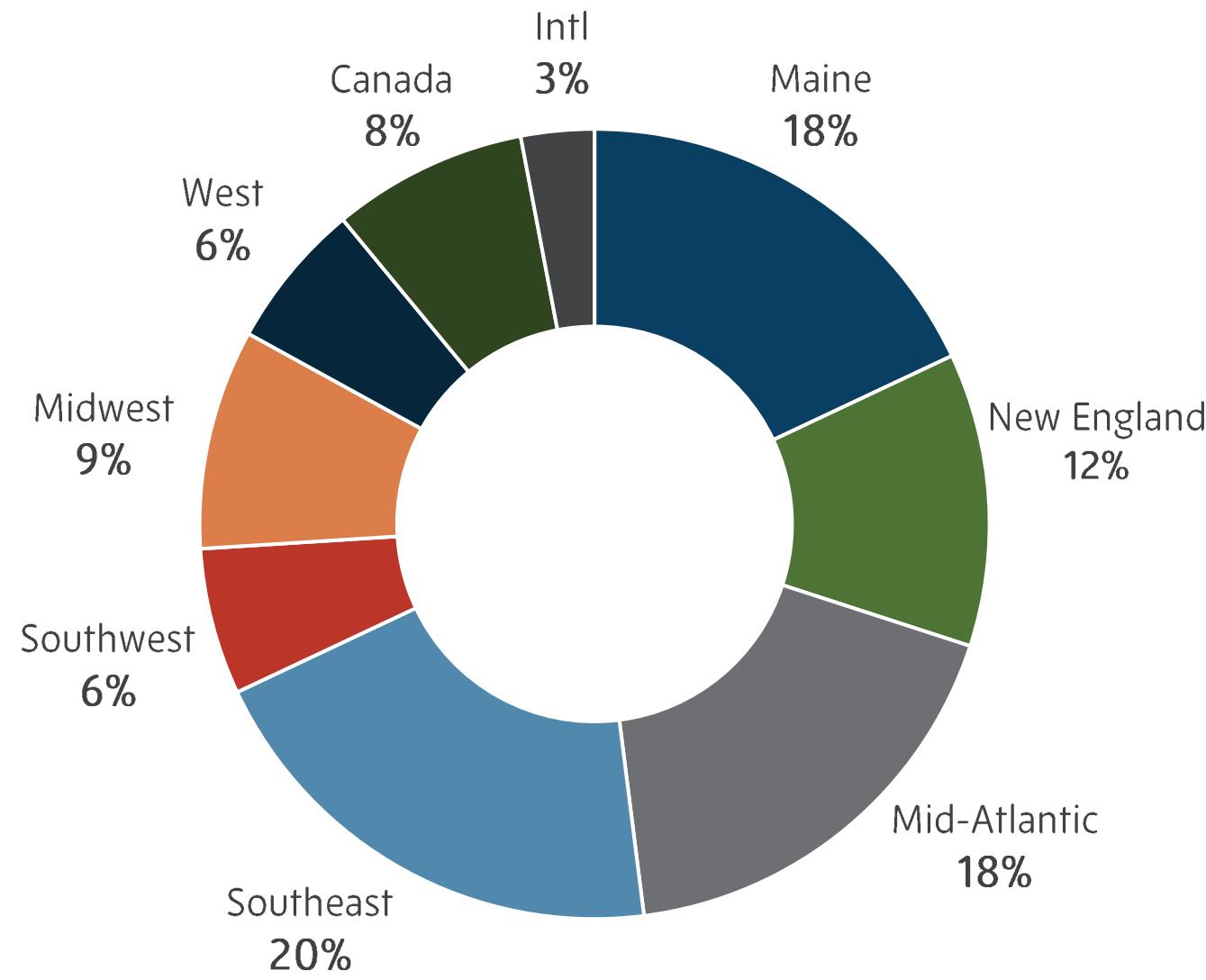
Base: 29% of visitors who recalled advertising



VISITOR JOURNEY : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **63%** of visitors traveled to/within Maine from **11** U.S. states
- » **18%** of visitors were residents of Maine traveling throughout the state

State	Percent
Maine	18%
Florida	8%
Massachusetts	6%
New Brunswick	6%
Texas	5%
New York	4%
North Carolina	4%
Pennsylvania	3%
New Jersey	3%
New Hampshire	3%
Virginia	3%

TOP ORIGIN MARKETS

- » **1 in 4** visitors traveled from 9 U.S. markets
- » **6%** of visitors traveled to Maine from New York City

Market	Percent
New York City ¹	6%
Washington DC - Baltimore ²	5%
Philadelphia	2%
Orlando	2%
Fredericton, CAN	2%
Boston	2%
Atlanta	2%
Dallas - Ft. Worth	2%
Miami - Ft. Lauderdale	2%

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

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

TRAVEL PARTIES

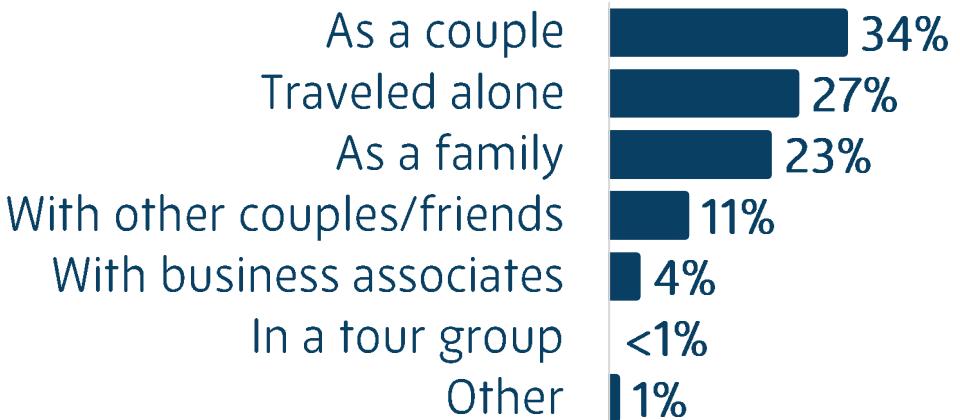
» Typical visitors traveled to Maine in parties of **2.7** people

» Over **1 in 3** visitors traveled as a couple

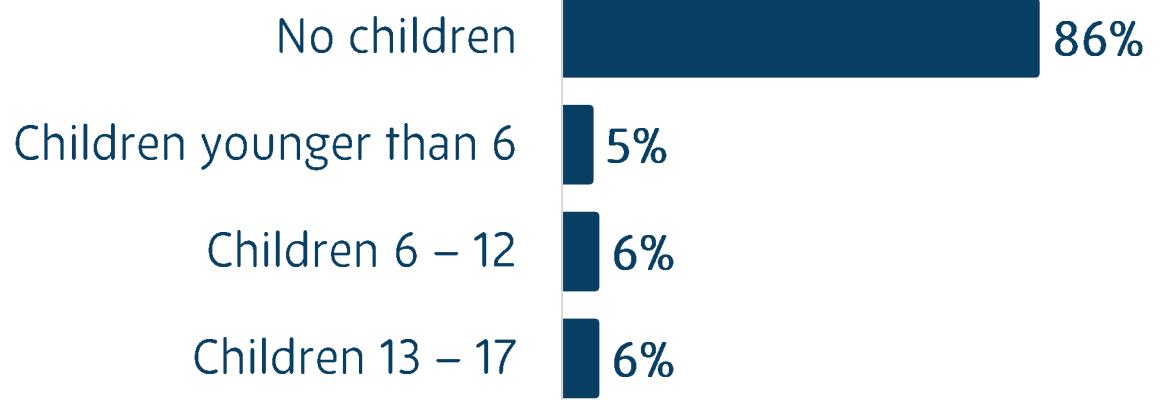
» Over **1 in 4** traveled alone

» **14%** of visitors traveled with one or more children in their travel party

Travel Party Composition

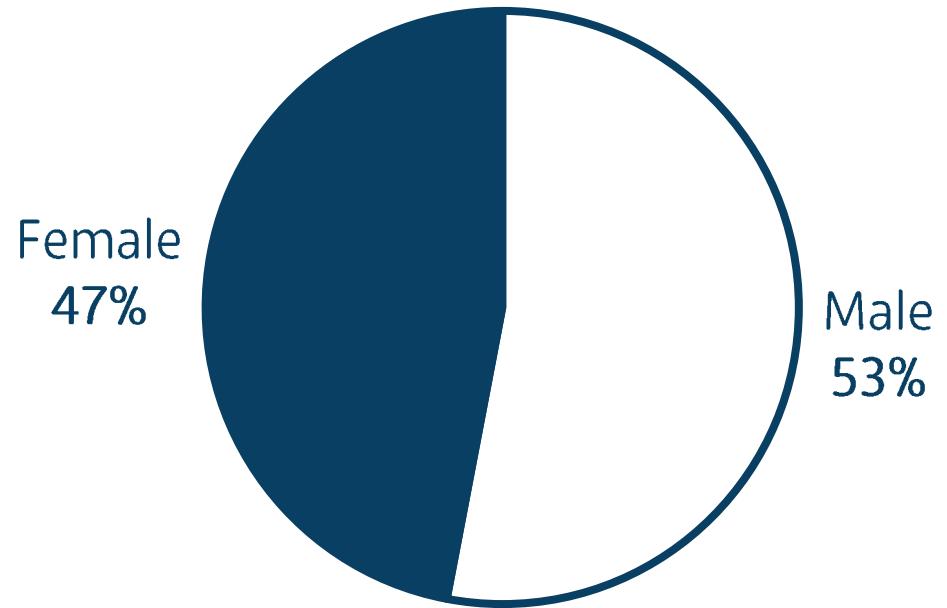


Children in Travel Party*

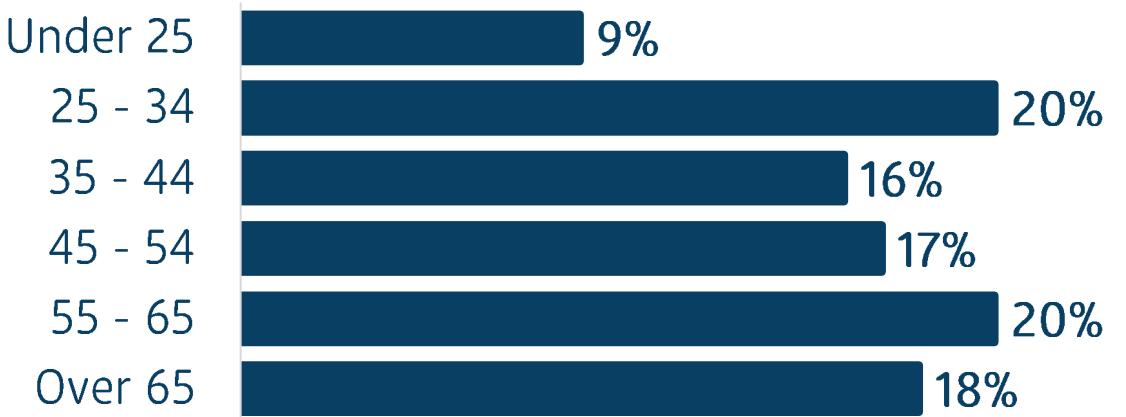


GENDER

» Over half of visitors to Maine interviewed were males



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



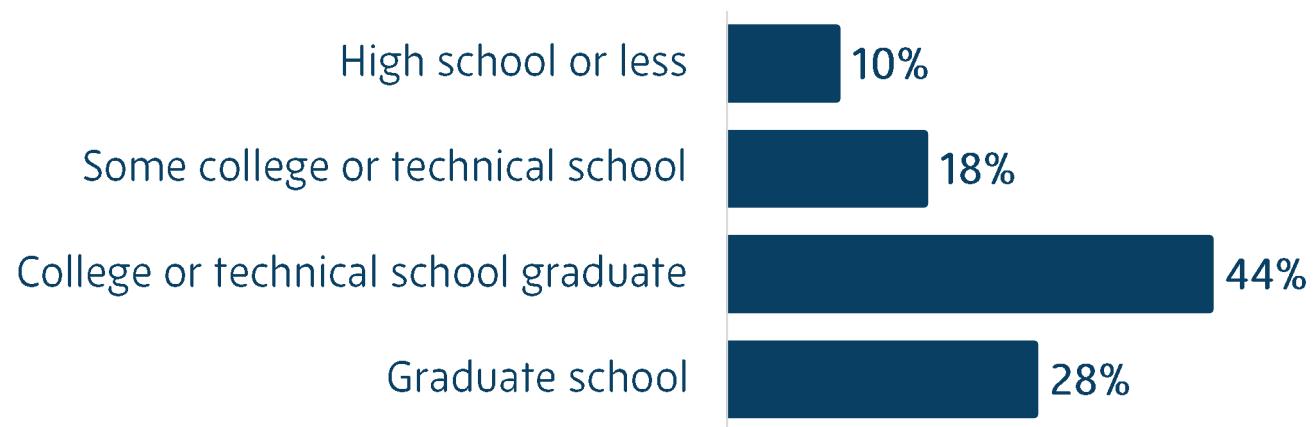
RACE & ETHNICITY

» Nearly 9 in 10 visitors to Maine were white



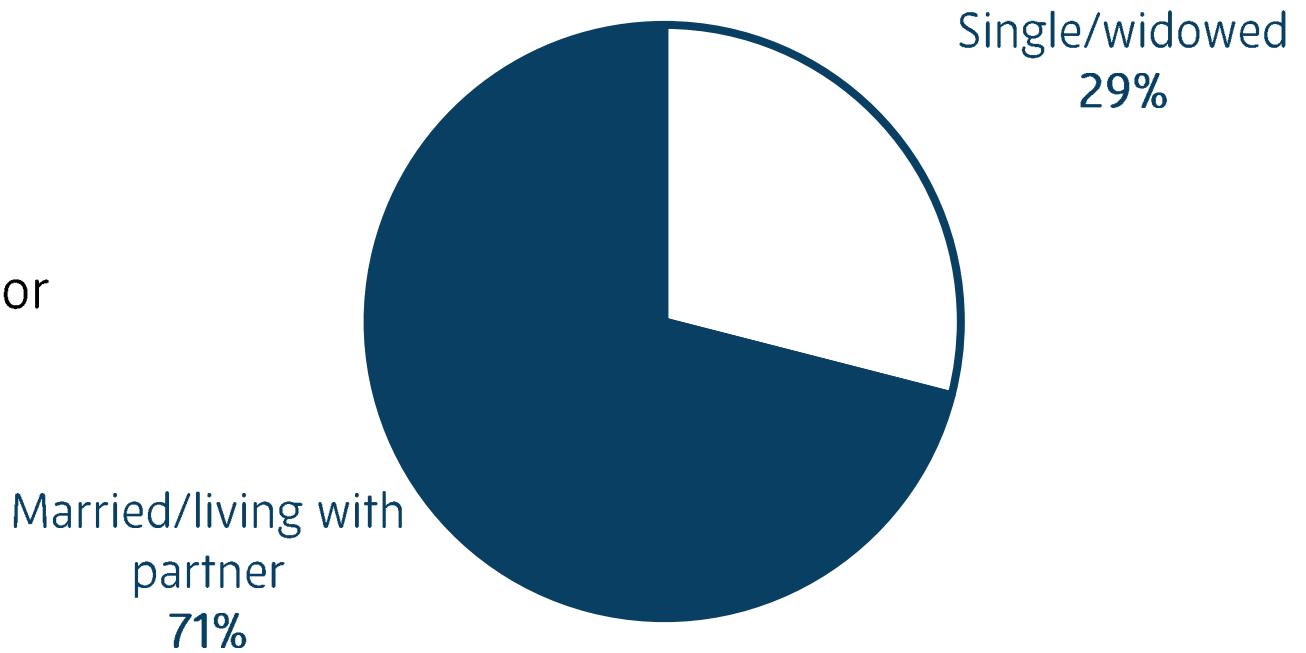
EDUCATIONAL ATTAINMENT

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



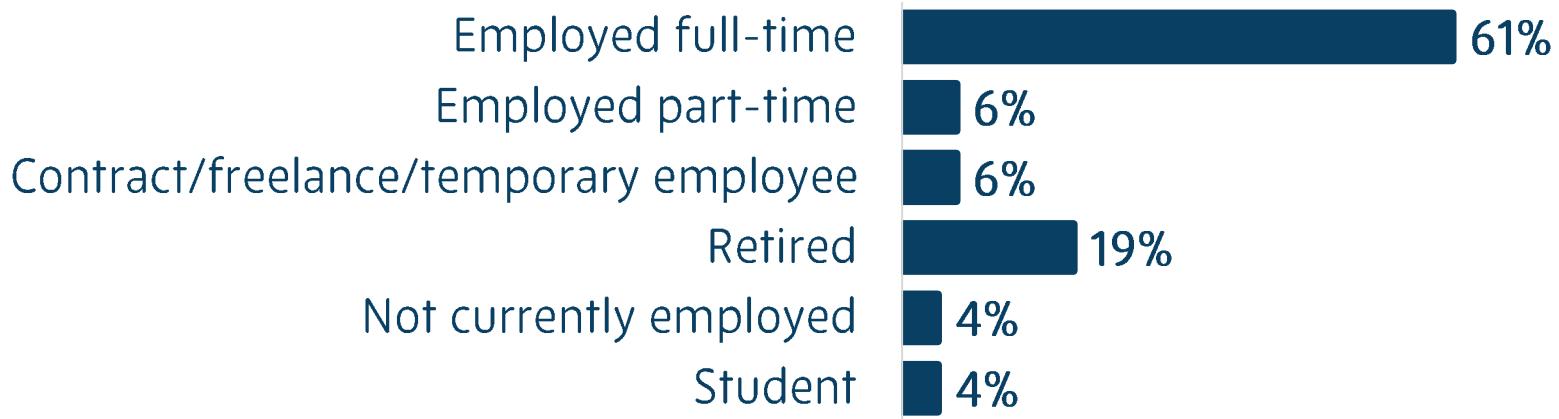
MARITAL STATUS

- » About **7 in 10** 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

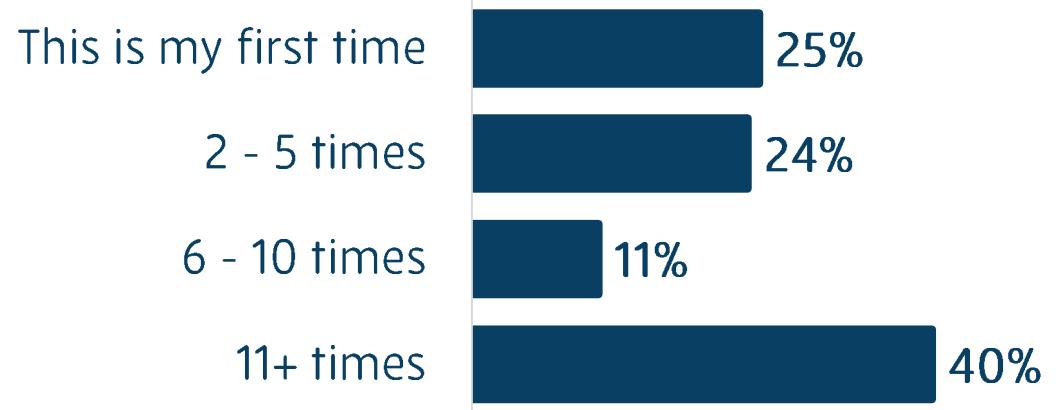
- » The average household income of visitors to Maine is **\$104,500** per year
- » **30%** of visitors to Maine earned more than \$150,000 per year



NEW & RETURNING VISITORS

» 25% of visitors were traveling in Maine for the first time

» Maine has high repeat and loyal visitors, as 40% had previously traveled in Maine more than 10 times (+6% points from 2022)

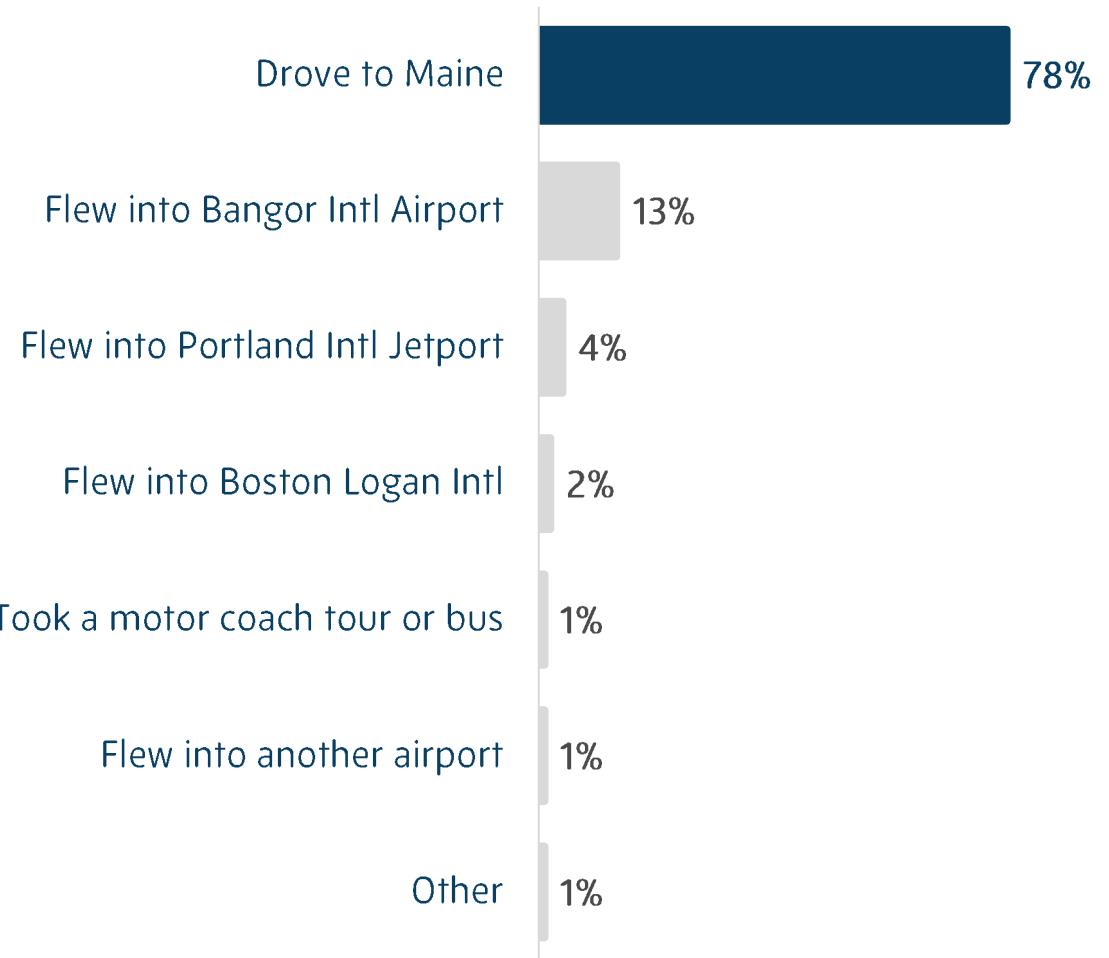


VISITOR JOURNEY : TRIP EXPERIENCE



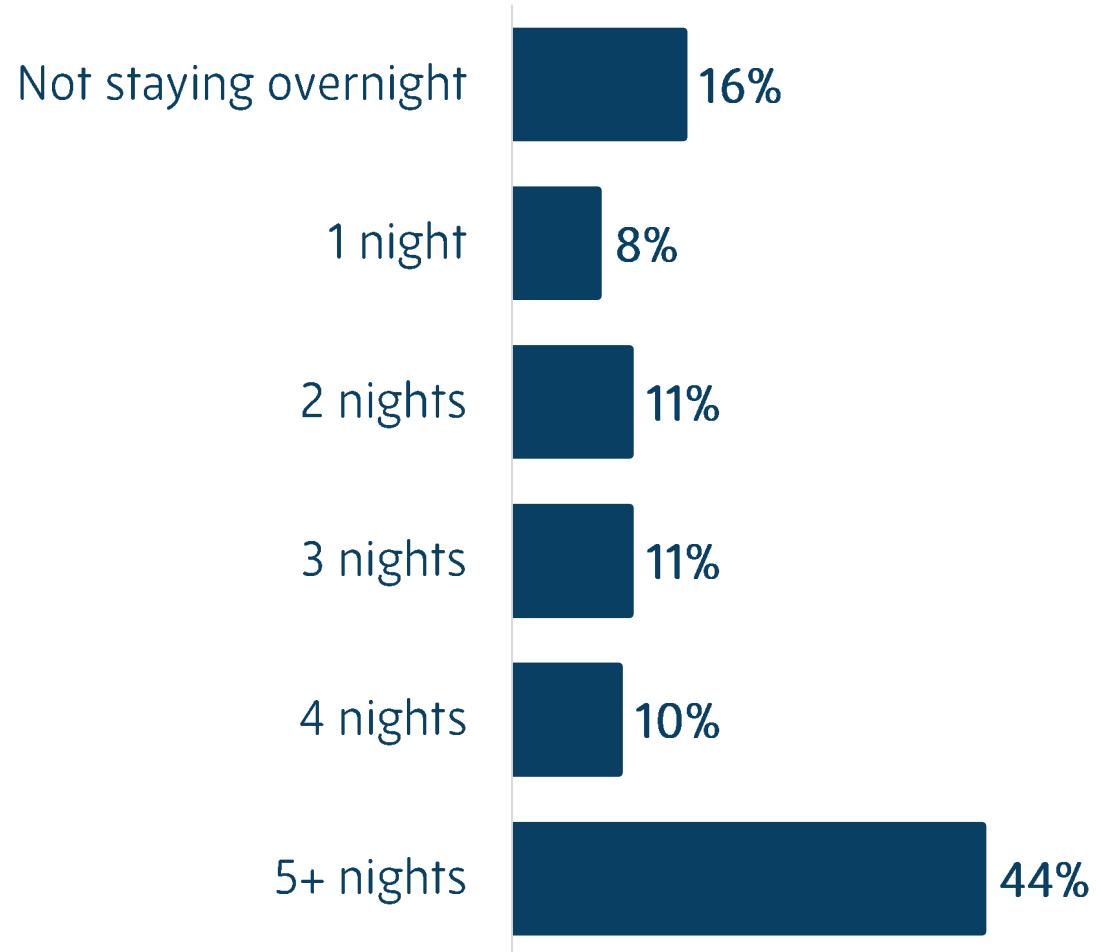
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with 78% choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Bangor International Airport



NIGHTS STAYED

- » 84% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed 6.0* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 5.8 nights in Maine on their trips



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

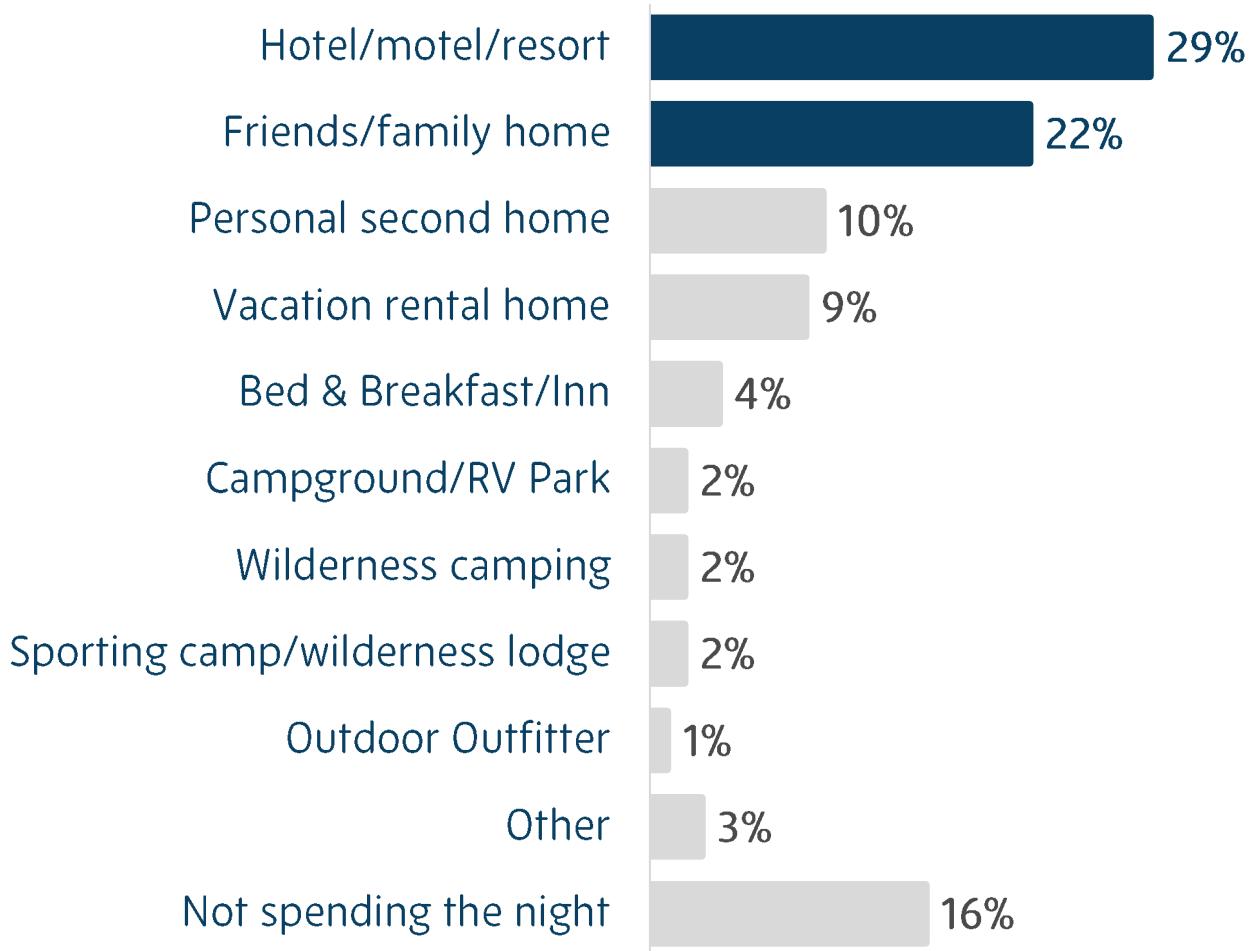
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73

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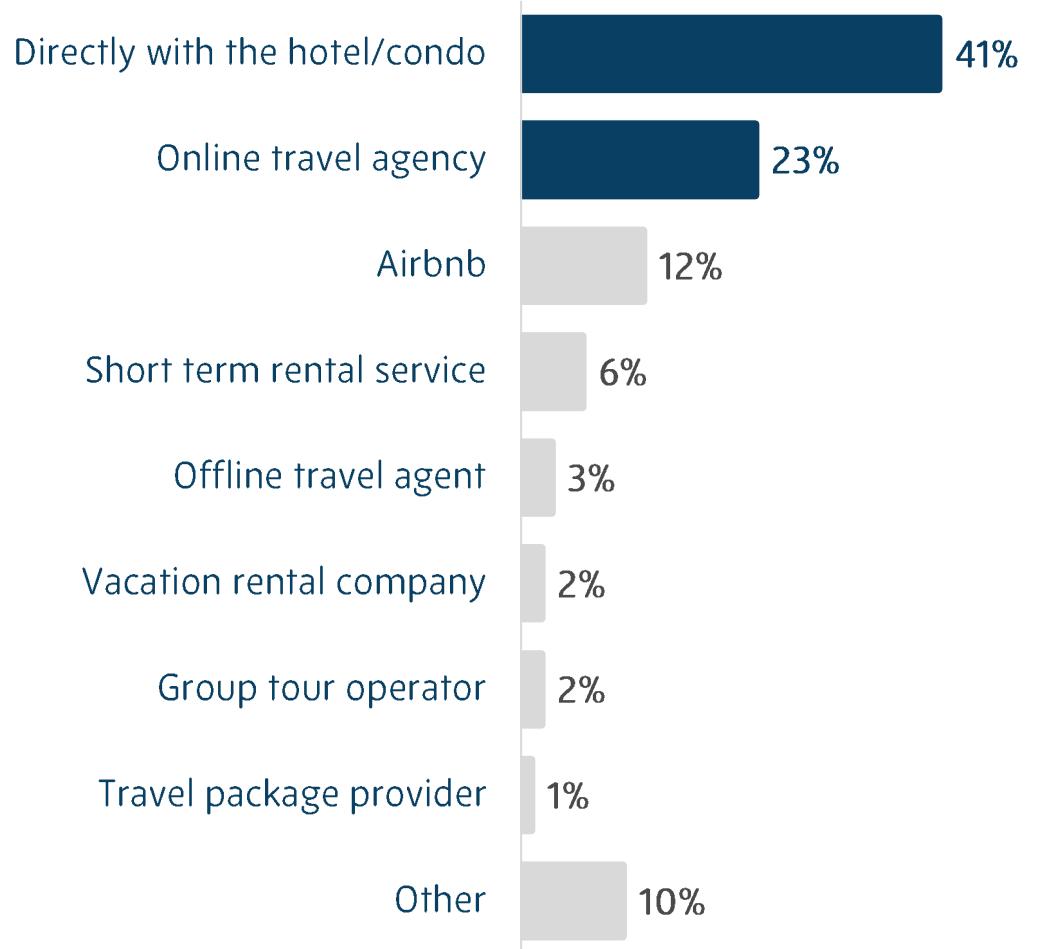
ACCOMMODATIONS

- » Nearly 3 in 10 visitors stayed overnight in a hotel/motel/resort
- » Over 1 in 5 visitors stayed with friends/family
- » 1 in 6 visitors came just for the day



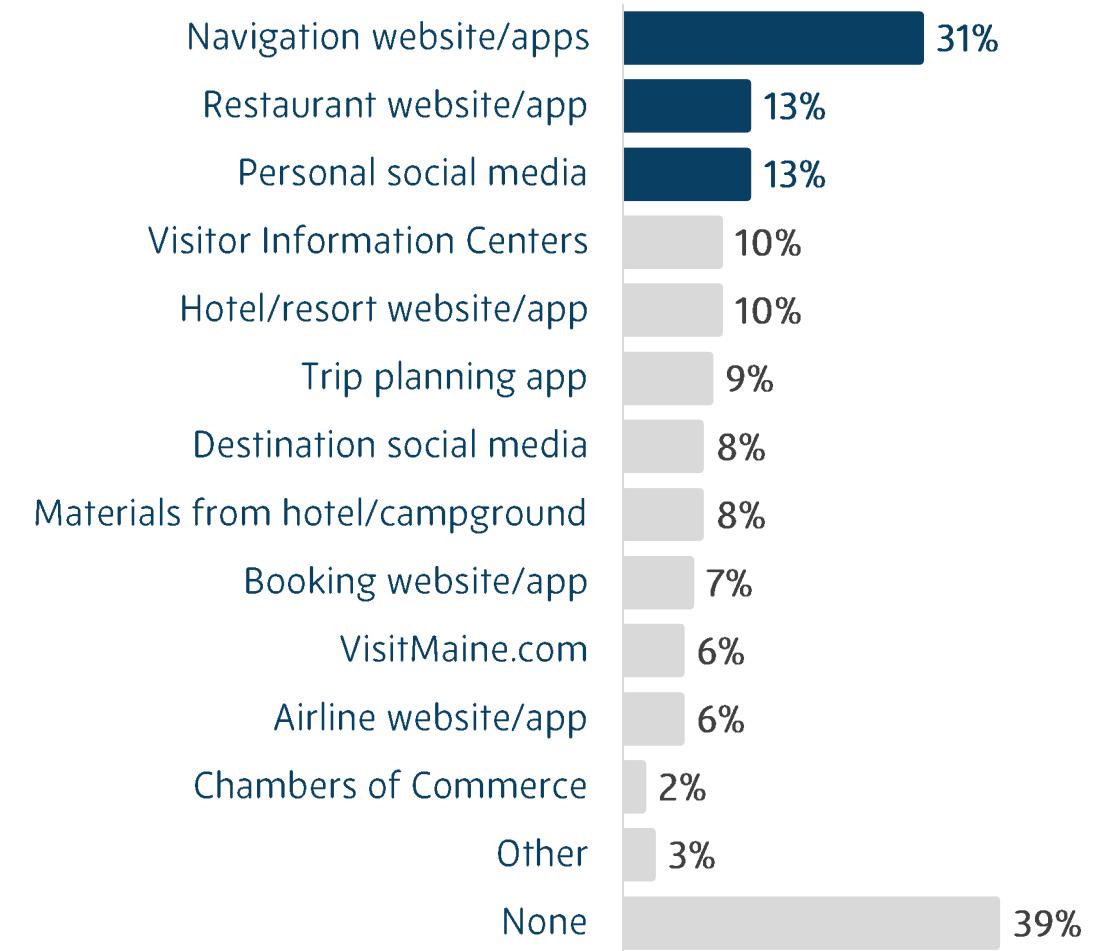
BOOKING METHODS

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



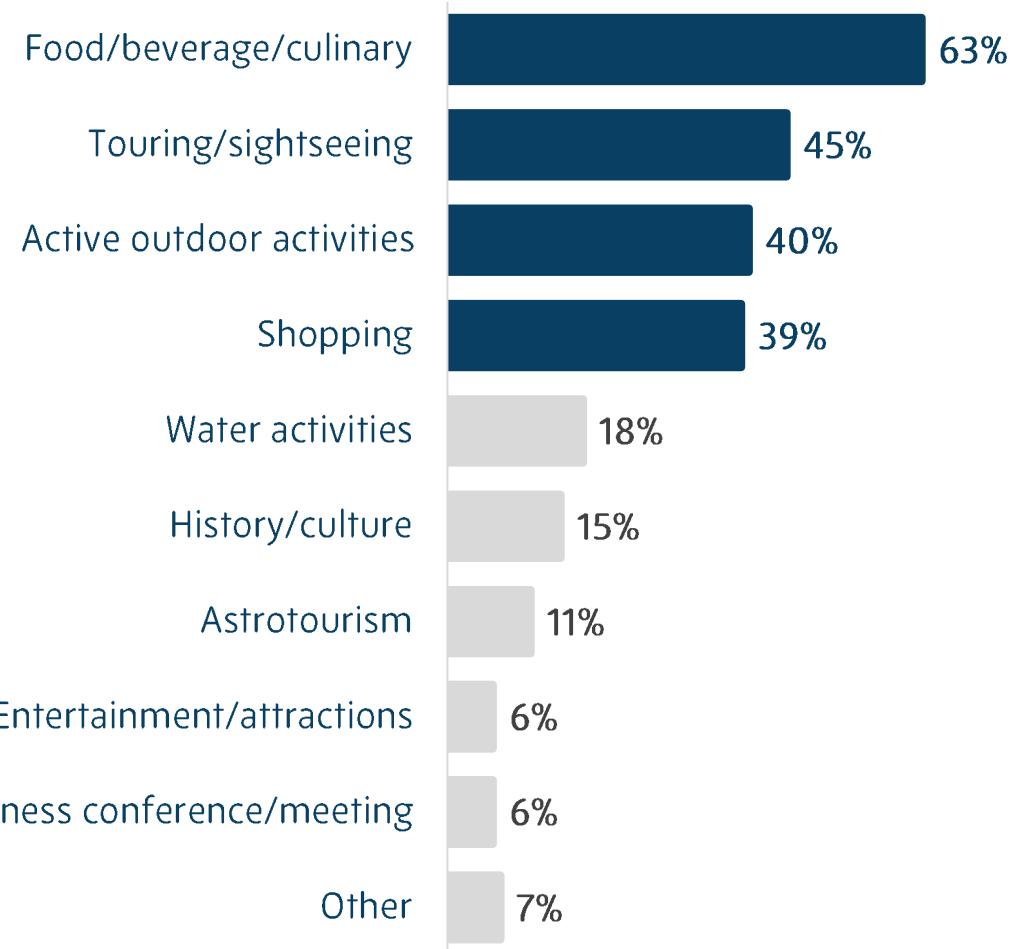
IN-MARKET VISITOR RESOURCES*

- » Visitors were most likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Nearly **2 in 5** visitors did not use any resources to plan activities while they were in-market

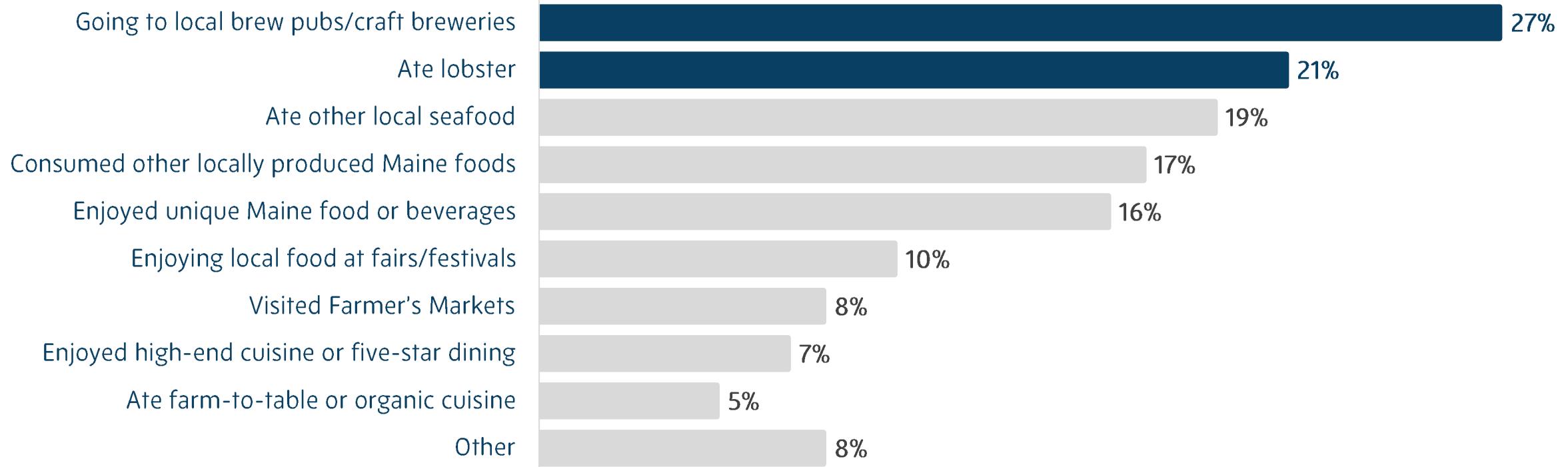


VISITOR ACTIVITIES*

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

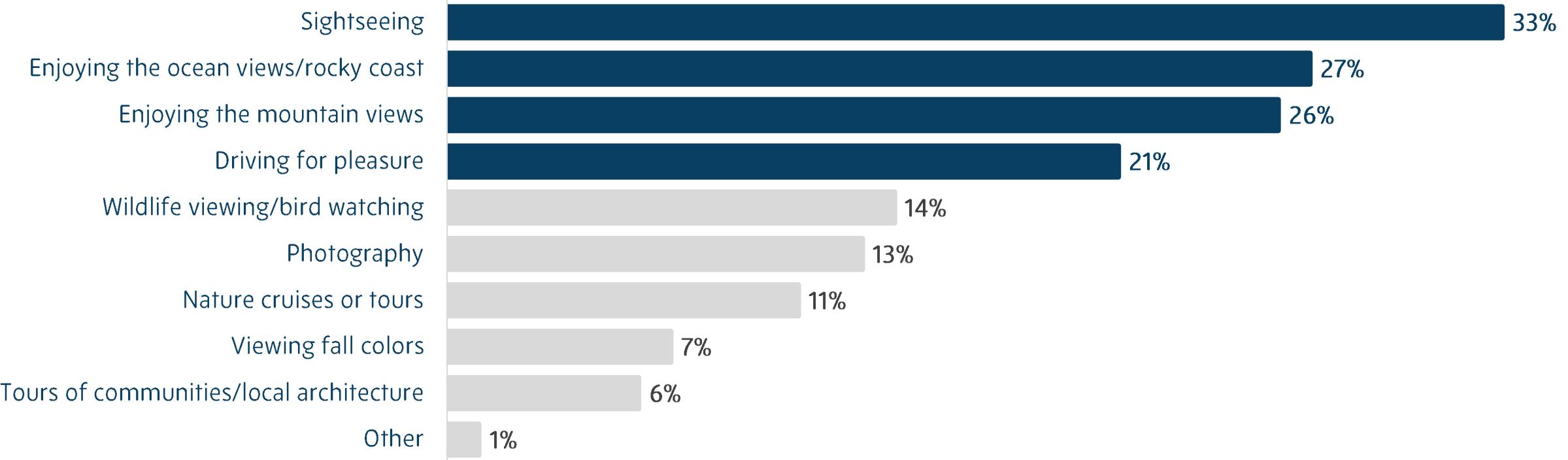


FOOD & BEVERAGE ACTIVITIES*

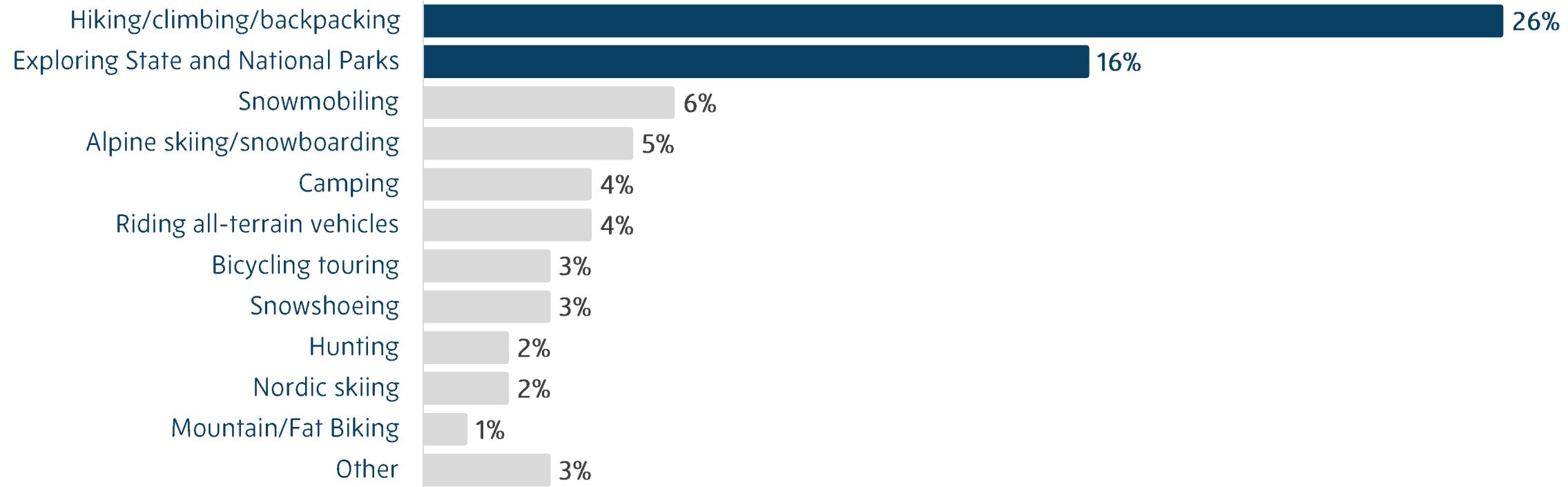


*Multiple responses permitted.

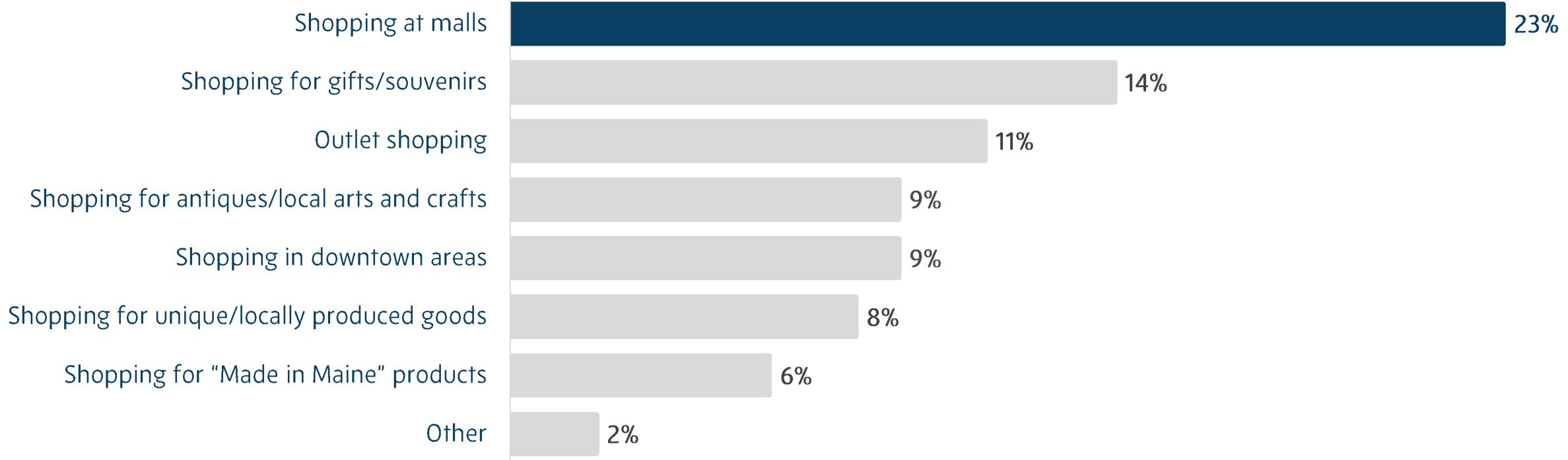
TOURING & SIGHTSEEING ACTIVITIES*



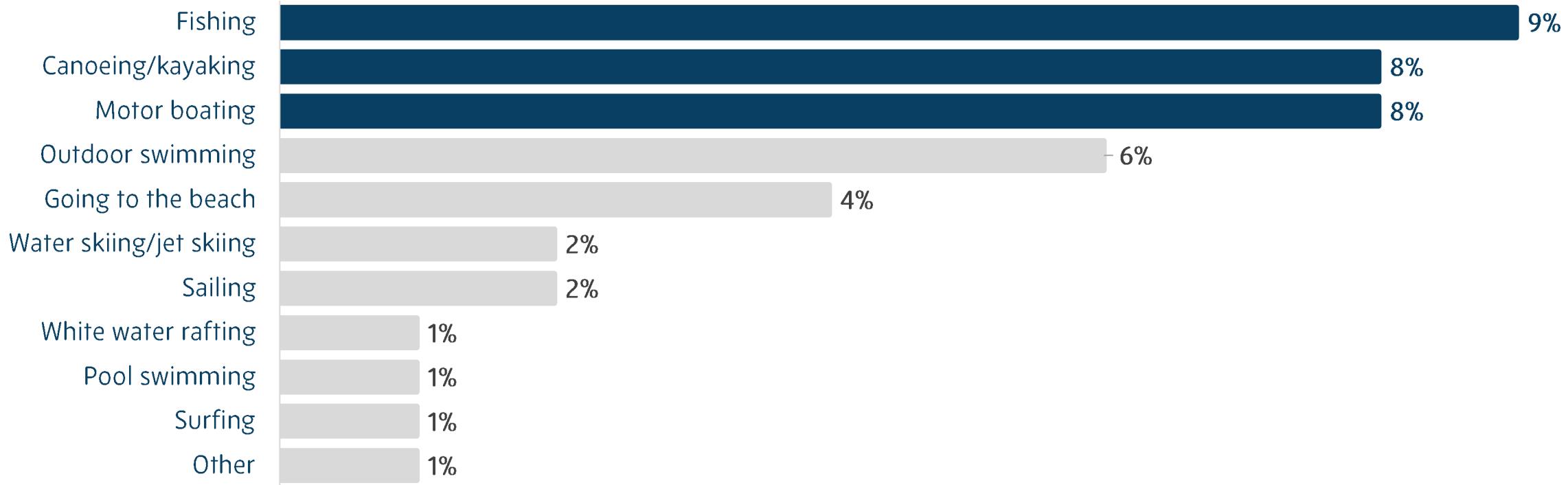
ACTIVE OUTDOOR ACTIVITIES*



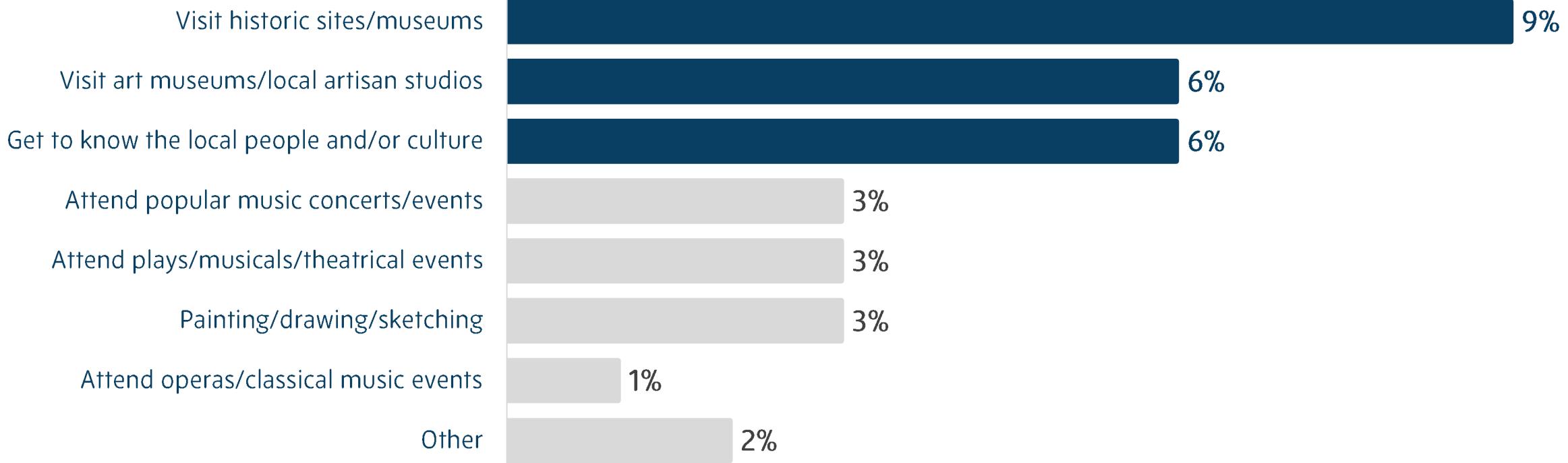
SHOPPING ACTIVITIES*



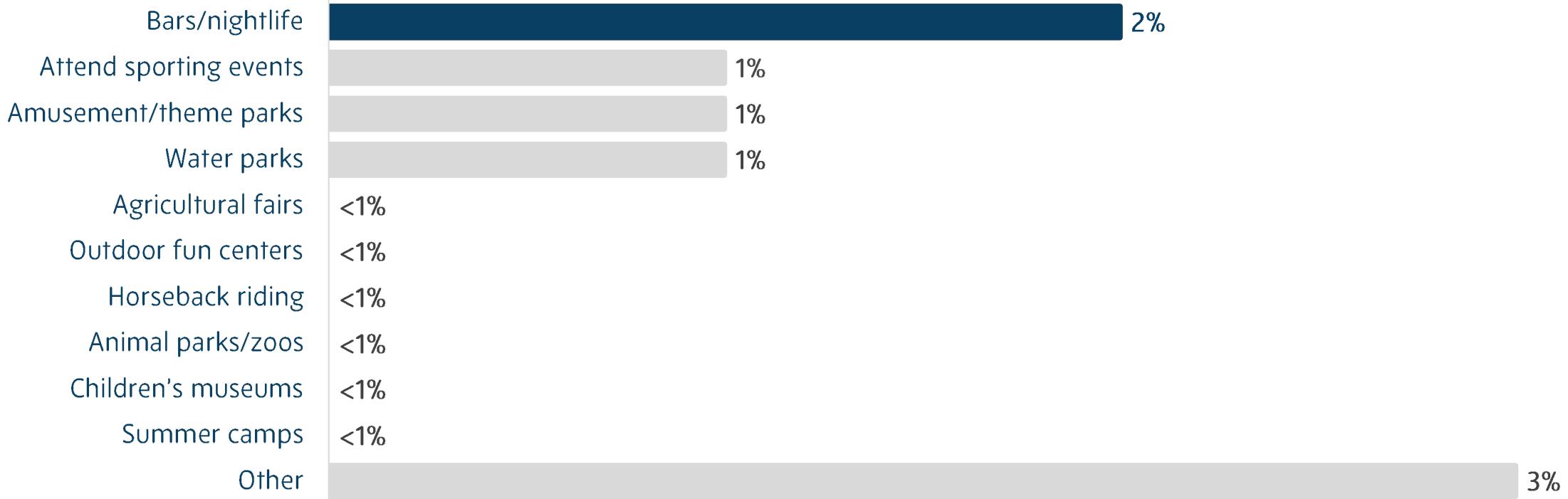
WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



ENTERTAINMENT ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

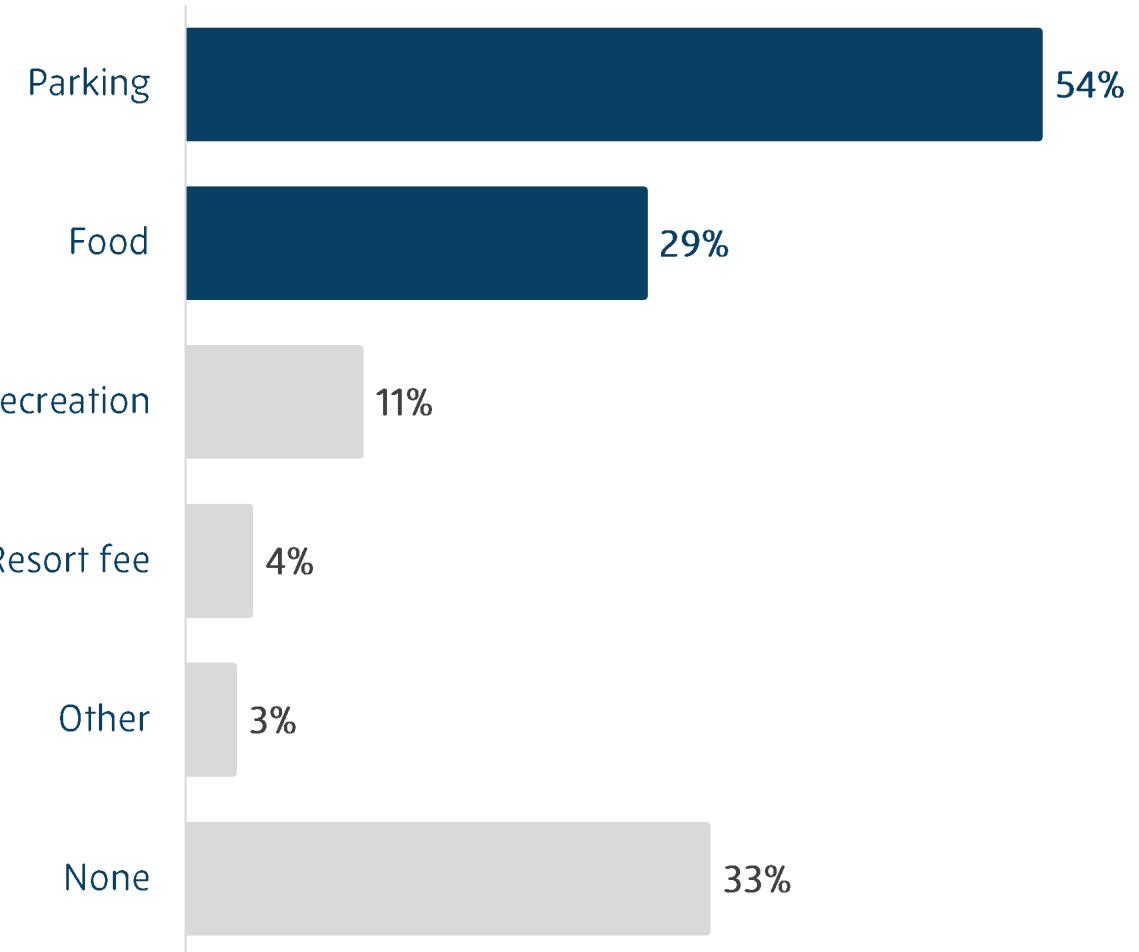
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$214	\$0	\$0
Transportation	\$68	\$41	\$41
Groceries	\$29	\$34	\$10
Restaurants	\$113	\$62	\$53
Shopping	\$90	\$54	\$66
Activities & Attractions	\$57	\$24	\$9
Other	\$14	\$6	\$4
Daily Spending	\$585	\$221	\$183

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,241	\$0	\$0
Transportation	\$394	\$357	\$41
Groceries	\$168	\$296	\$10
Restaurants	\$655	\$539	\$53
Shopping	\$522	\$470	\$66
Activities & Attractions	\$331	\$209	\$9
Other	\$81	\$52	\$4
Total Spending	\$3,392	\$1,923	\$183

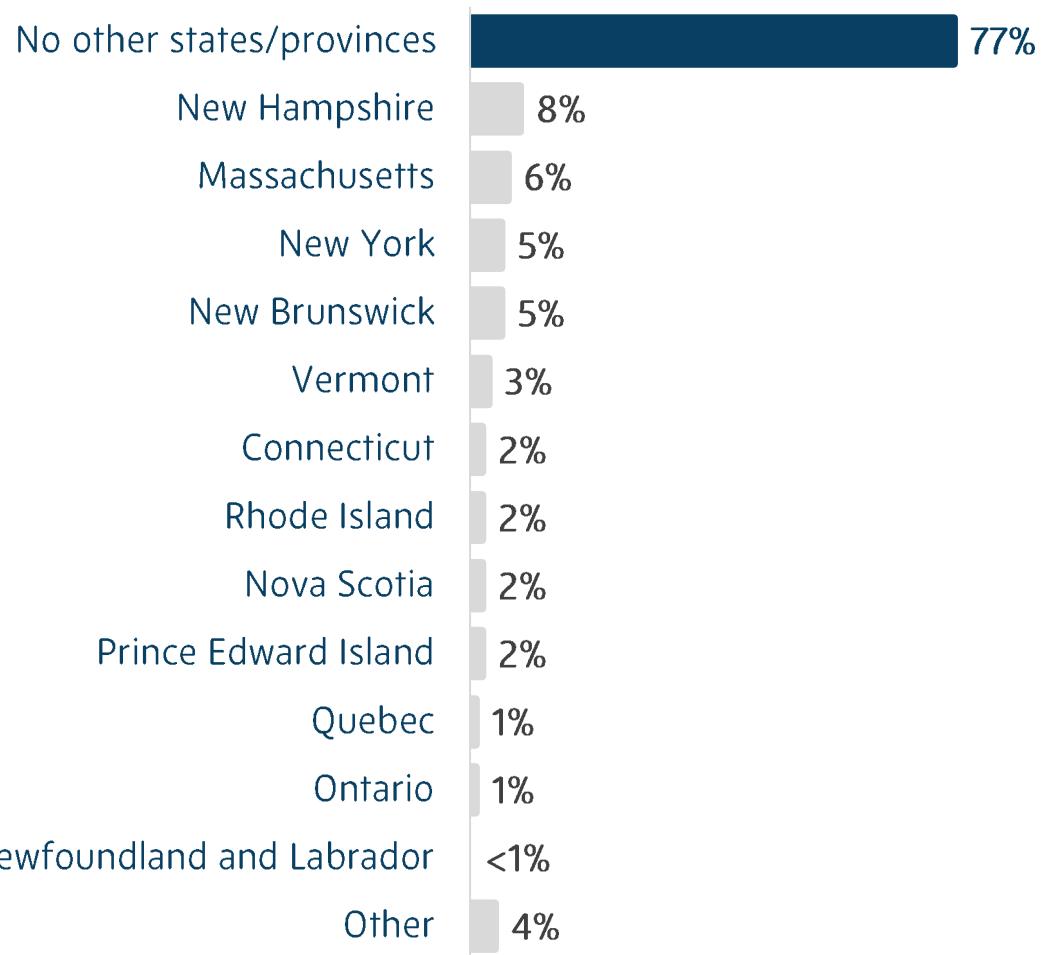
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for **2 in 3** visitors
- » Price for accommodations included parking for over **half** of visitors
- » Food was included in accommodations' pricing for **29%** of visitors



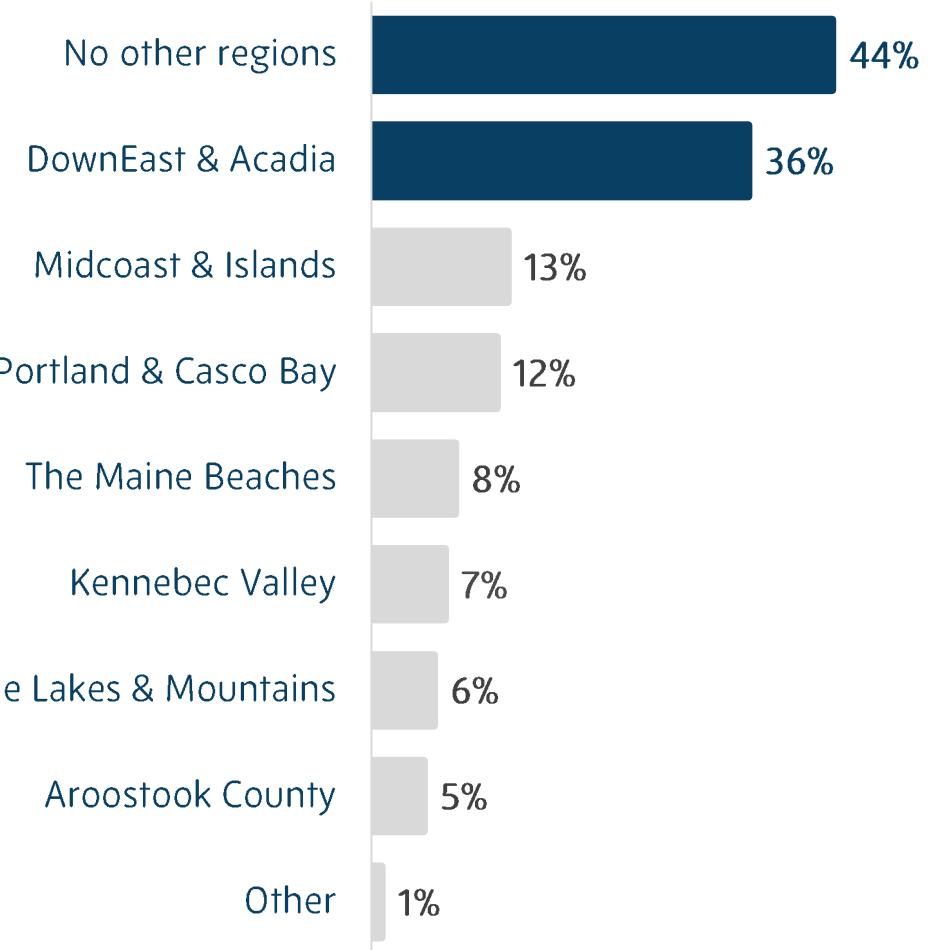
OTHER STATES & PROVINCES VISITED*

» Over 3 in 4 visitors did not visit any other U.S. state or Canadian province during their trip



TRAVELING WITHIN MAINE*

- » Over 2 in 5 visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+12% points from 2022)
- » 36% of visitors visited DownEast & Acadia in addition to their primary destination within Maine



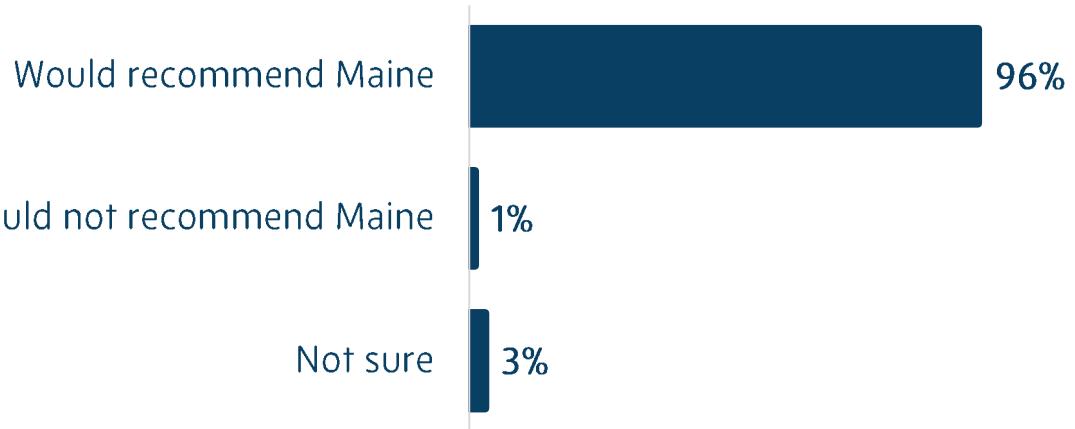
VISITOR JOURNEY : POST-TRIP EVALUATION



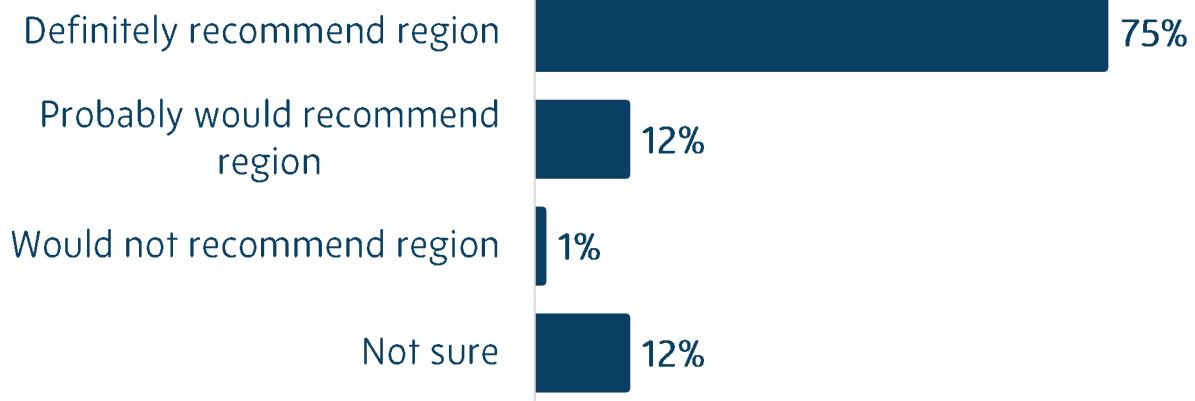
RECOMMENDING MAINE & ITS REGIONS

- » 96% of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » 87% 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

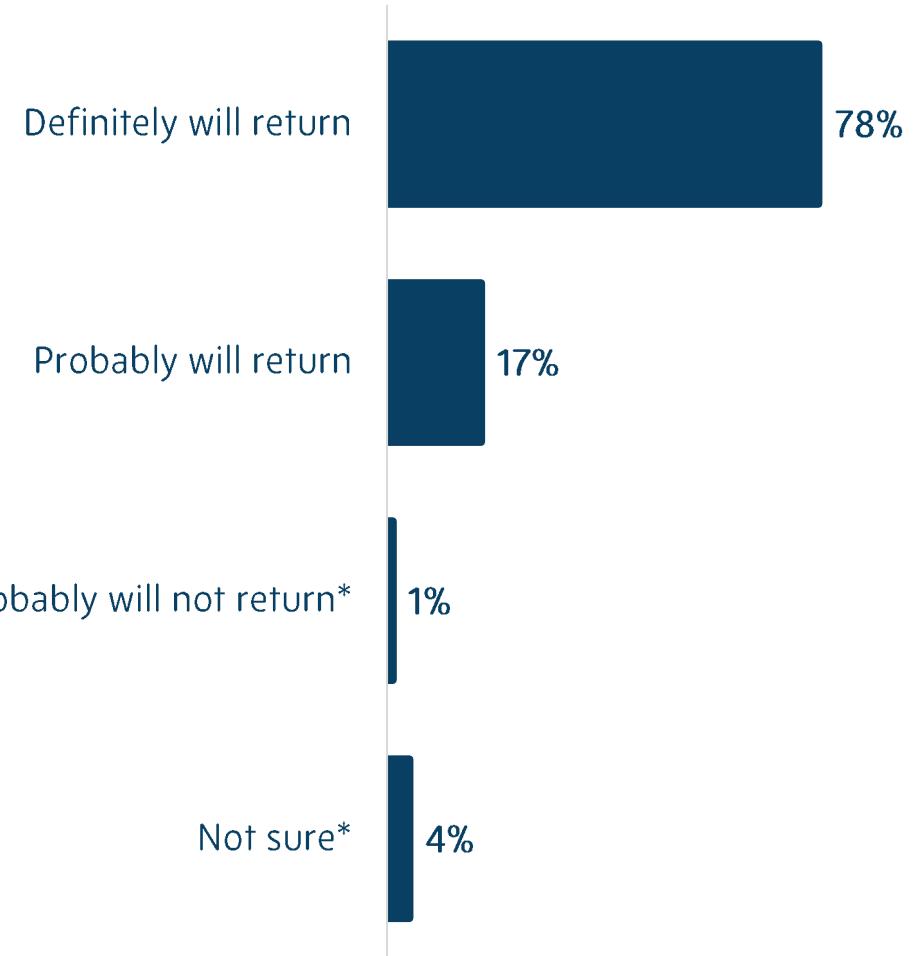


Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

» 95% of visitors will return to Maine for a future visit or vacation



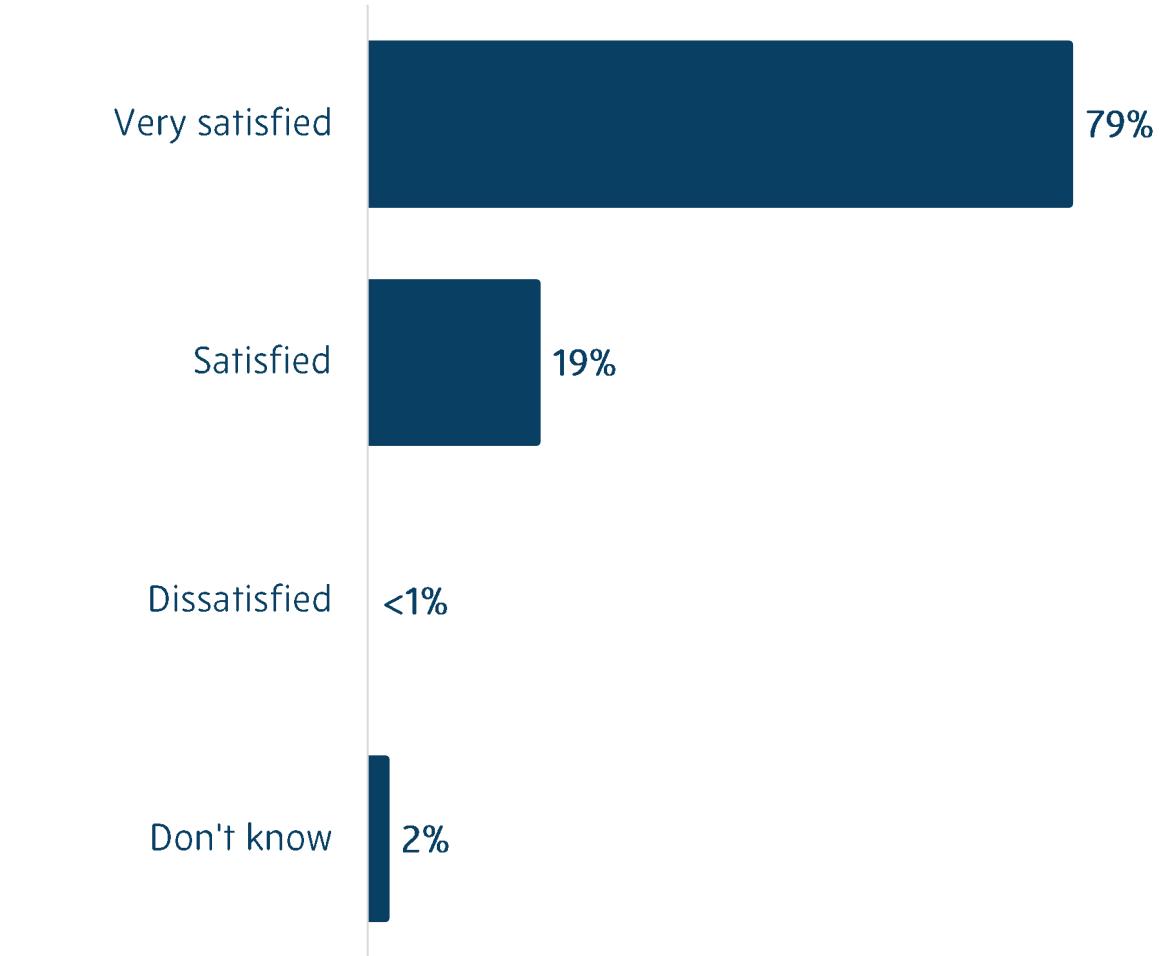
*5% of all visitors are not sure or will probably not return to Maine for the following reasons:

1. Prefer a variety of destinations.

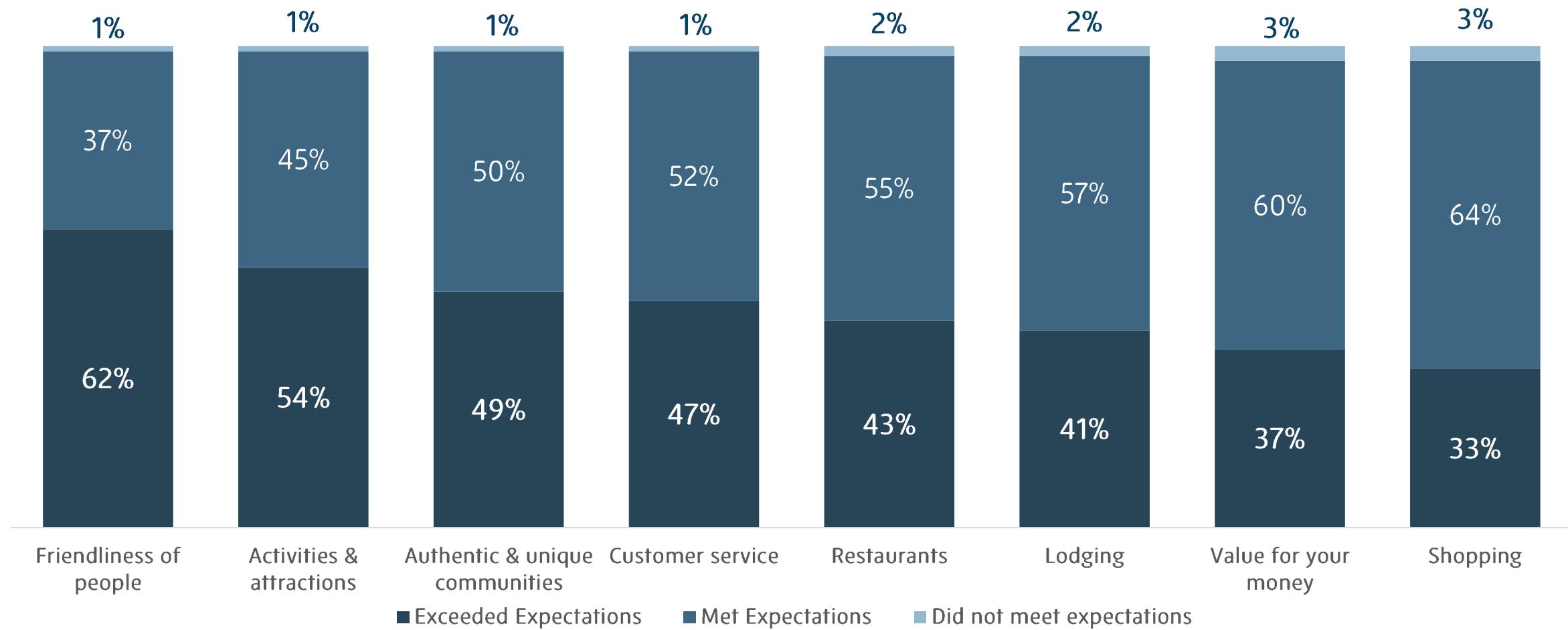
SATISFACTION

» 98% of visitors were satisfied with their trip to Maine

» Nearly 4 in 5 visitors were very satisfied with their trip to Maine (+7% points from 2022)



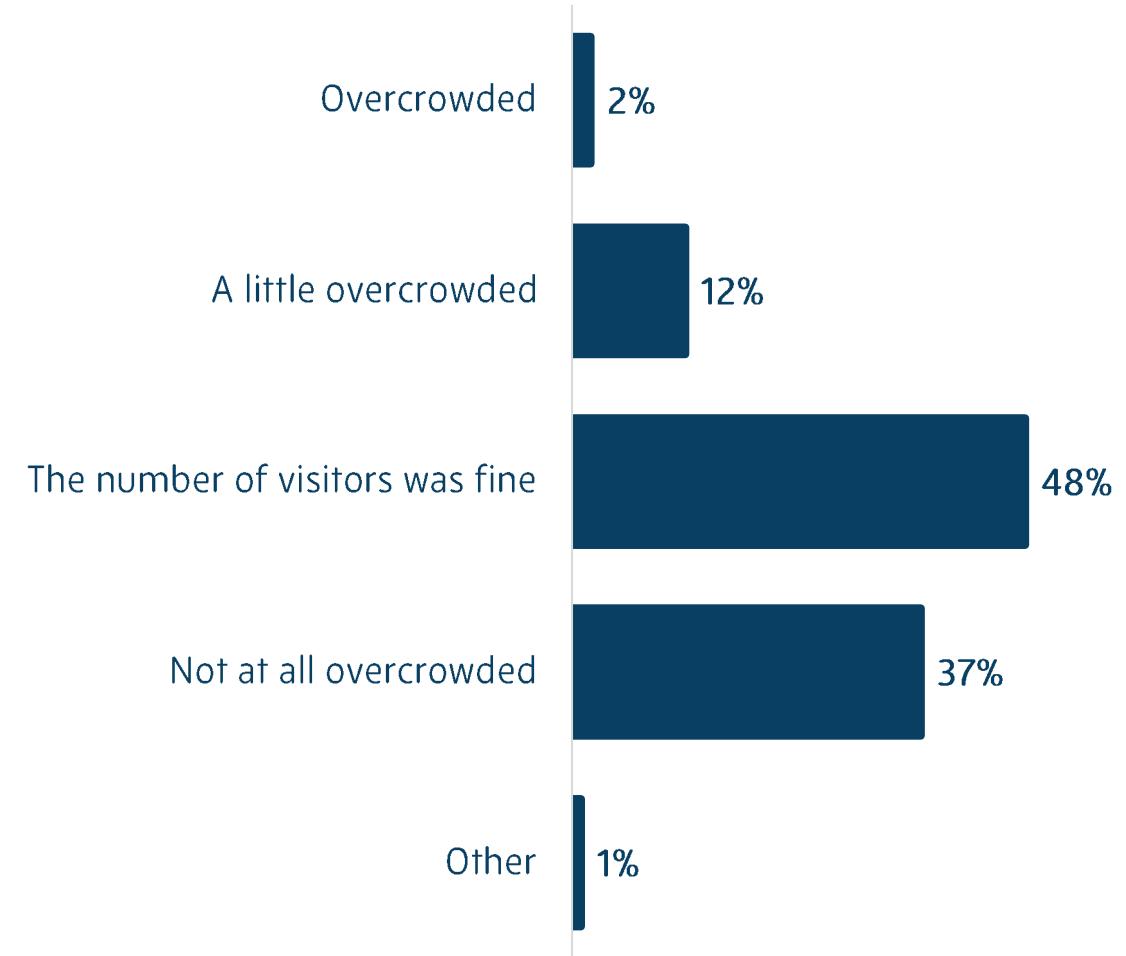
TRIP RATINGS



OVERCROWDING

» **48%** of visitors thought the number of visitors during their trip to Maine was fine

» **12%** 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	16%	15%
2 - 3 weeks	15%	16%
1 - 2 months	23%	23%
3 - 4 months	18%	20%
5 - 6 months	12%	11%
7 months - 1 year	8%	8%
More than 1 year	8%	7%
Days in Planning Cycle	55	55
Booking Window	2022	2023
A week or less	22%	20%
2 - 3 weeks	17%	17%
1 - 2 months	27%	27%
3 - 4 months	15%	17%
5 - 6 months	9%	8%
7 months - 1 year	6%	7%
More than 1 year	4%	4%
Days in Booking Window	42	44

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2022	2023
Online search engines	26%	27%
Airline websites	17%	17%
Online travel agency	13%	17%
Hotel websites	12%	13%
TripAdvisor	11%	11%
Facebook	10%	11%
Airbnb	10%	10%
Traveler reviews/blogs/stories	9%	8%
YouTube	8%	8%
VisitMaine.com	10%	7%
Instagram	6%	7%
VRBO/HomeAway	6%	5%
VisitBarHarbor.com	4%	5%
Vacation rental websites	5%	3%
DowneastAcadia.com	3%	3%
MaineTourism.com	5%	3%
Visit Maine social media	4%	2%
TheMaineHighlands.com	2%	2%
DiscoverNewEngland.com	2%	1%
MainesMidCoast.com	2%	1%
TheMaineBeaches.com	1%	1%
VisitPortland.com	2%	1%
MaineLakesandMountains.com	2%	1%
Twitter	2%	1%
VisitAroostook.com	1%	<1%
KennebecValley.org	1%	<1%
Other	7%	6%
None	29%	37%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2022	2023
Advice from friends/family	33%	30%
Travel books & magazines	7%	7%
Travel planning apps	9%	7%
AAA	7%	6%
Articles or travelogues	8%	6%
Travel guides/brochures	9%	6%
Travel agent	3%	3%
Visitor Guide	3%	2%
Called local convention and visitors bureaus	1%	1%
Called local Chambers of Commerce	2%	1%
Called the Maine Office of Tourism	3%	1%
Called another Maine Tourism/Lodging Association	2%	1%
Visit Maine e-newsletter	2%	1%
Other	4%	4%
None	47%	53%

*Multiple responses permitted.

REASON FOR VISITING*

Reasons for Visiting	2022	2023
Visiting friends/relatives	31%	33%
Relax and unwind	27%	29%
Sightseeing/touring	25%	23%
Nature & bird watching	19%	16%
Conference/meeting	10%	11%
Active outdoor activities	12%	9%
Special occasion	9%	9%
Snow activities	6%	7%
Shopping	6%	7%
Attractions	6%	6%
Water activities	6%	6%
Special event	5%	5%
Beach	3%	3%
Culture/museums/history	3%	3%
Sporting event	1%	2%
Astrotourism	1%	1%
Other	9%	11%

*Multiple responses permitted.

TV SHOWS & FILM*

Trip Inspiration From Film	2022	2023
Yes	NA	4%
No	NA	96%
Don't know	NA	<1%
How Film Inspired Trip**	2022	2023
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	NA	32%
Seeing Maine in a film or TV show made me think about Maine as a place to visit	NA	32%
Visiting a location related to a TV show or film was the main reason I visited Maine	NA	16%
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	NA	11%
Something else	NA	9%
Visited TV or Film Attractions***	2022	2023
Yes	NA	3%
No	NA	95%
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	72%	77%
New Hampshire	10%	6%
Vermont	7%	5%
Massachusetts	6%	5%
New York	6%	4%
Nova Scotia	3%	4%
New Brunswick	3%	3%
Connecticut	3%	2%
Rhode Island	3%	2%
Prince Edward Island	2%	2%
Quebec	2%	2%
Ontario	2%	1%
Newfoundland and Labrador	1%	1%
Other	6%	4%

ADVERTISING/PROMOTIONS

Recalled Advertising	2022	2023
Yes	35%	29%
No	46%	52%
Not sure	19%	19%
Influenced by Advertising	2022	2023
Yes	17%	12%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recall*	2022	2023
Social media	38%	36%
Internet	37%	36%
Magazine	20%	19%
Cable or satellite television	16%	19%
VisitMaine.com	11%	12%
Radio	12%	11%
Traveler reviews/blogs	10%	10%
Maine travel/visitor guide	12%	9%
Newspaper	11%	9%
Online streaming service	8%	7%
AAA	8%	7%
Music/podcast streaming	6%	7%
Brochure	7%	6%
Other	6%	5%
Billboard	4%	2%
Deal-based promotion	2%	2%
Other	6%	5%
Not sure	3%	2%

*Multiple responses permitted.

VISITOR JOURNEY : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2022	2023
Maine	18%	18%
New England	13%	12%
Mid-Atlantic	19%	18%
Southeast	20%	20%
Southwest	5%	6%
Midwest	10%	9%
West	6%	6%
Canada	7%	8%
International	2%	3%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2022	2023
Maine	18%	18%
Florida	9%	8%
Massachusetts	6%	6%
New Brunswick	5%	6%
Texas	3%	5%
New York	6%	4%
North Carolina	3%	4%
Pennsylvania	3%	3%
New Jersey	3%	3%
New Hampshire	4%	3%
Virginia	3%	3%

ORIGIN MARKET

Origin Markets	2022	2023
New York City ¹	7%	6%
Washington DC - Baltimore ²	5%	5%
Philadelphia	2%	2%
Orlando	2%	2%
Fredericton, CAN	1%	2%
Boston	3%	2%
Atlanta	2%	2%
Dallas - Ft. Worth	2%	2%
Miami - Ft. Lauderdale	2%	2%

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

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

TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2022	2023
As a couple	35%	34%
Traveled alone	27%	27%
As a family	23%	23%
With other couples/friends	11%	11%
With business associates	4%	4%
In a tour group	<1%	<1%
Other	<1%	1%
Average Travel Party Size	2.5	2.7

TRAVEL WITH CHILDREN*

Children in Travel Party*

2022

2023

No children	86%	86%
Children younger than 6	4%	5%
Children 6 – 12	7%	6%
Children 13 – 17	7%	6%

Gender

2022

2023

Male	51%	53%
Female	49%	47%

DEMOGRAPHIC PROFILE

Age	2022	2023
Under 25	10%	9%
25 – 34	17%	20%
35 – 44	17%	16%
45 – 54	19%	17%
55 – 65	20%	20%
Over 65	17%	18%
Median Age	48	48
Race/Ethnicity	2022	2023
White	87%	87%
Black	4%	4%
Hispanic	3%	4%
Asian	4%	3%
Indigenous	1%	1%
Other	1%	1%

LIFESTYLE PROFILE

Marital Status	2022	2023
Single/widowed	29%	29%
Married/living with partner	71%	71%
Employment Status	2022	2023
Employed full-time	58%	61%
Employed part-time	8%	6%
Contract/freelance/temporary employee	5%	6%
Retired	19%	19%
Not currently employed	4%	4%
Student	6%	4%

LIFESTYLE PROFILE

Household Income	2022	2023
Less than \$25,000	7%	5%
\$25,000 - \$49,999	11%	10%
\$50,000 - \$74,999	15%	17%
\$75,000 - \$99,999	17%	16%
\$100,000 - \$149,999	21%	22%
\$150,000 - \$199,999	13%	14%
\$200,000 - \$249,999	5%	7%
\$250,000 or more	11%	9%
Median Household Income	\$100,000	\$104,500

LIFESTYLE PROFILE

Educational Attainment	2022	2023
High school or less	10%	10%
Some college or technical school	18%	18%
College or technical school graduate	44%	44%
Graduate school	28%	28%

NEW & RETURNING VISITORS

Previous Trips to Maine

2022

2023

This is my first time	27%	25%
2 - 5 times	27%	24%
6 - 10 times	12%	11%
11+ times	34%	40%

VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2022	2023
Drove to Maine	74%	78%
Flew into Bangor Intl Airport	14%	13%
Flew into Portland Intl Jetport	3%	4%
Flew into Boston Logan Intl	2%	2%
Flew into another airport	1%	1%
Took a motor coach tour or bus	2%	1%
Traveled by train	1%	<1%
Other	2%	1%

LENGTH OF STAY

Nights Stayed	2022	2023
Not staying overnight	11%	16%
1 night	6%	8%
2 nights	10%	11%
3 nights	13%	11%
4 nights	10%	10%
5+ nights	50%	44%
Average Length of Stay	6.8	6.0

ACCOMMODATIONS

Accommodations	2022	2023
Hotel/motel/resort	27%	29%
Friends/family home	22%	22%
Not spending the night	11%	16%
Personal second home	11%	10%
Vacation rental home	11%	9%
Bed & Breakfast/Inn	5%	4%
Campground/RV Park	4%	2%
Wilderness camping	3%	2%
Sporting camp/wilderness lodge	3%	2%
Outdoor Outfitter	<1%	1%
Other	3%	3%

BOOKING

Booking Methods	2022	2023
Directly with the hotel/condo	39%	41%
Online travel agency	20%	23%
Airbnb	13%	12%
Short term rental service	8%	6%
Offline travel agent	3%	3%
Vacation rental company	4%	2%
Group tour operator	1%	2%
Travel package provider	1%	1%
Other	11%	10%

IN-MARKET RESOURCES*

In-Market Resources	2022	2023
Navigation website/apps	33%	31%
Restaurant website/app	18%	13%
Personal social media	15%	13%
Hotel/resort website/app	11%	10%
Visitor Information Centers	12%	10%
Trip planning app	10%	9%
Destination social media	9%	8%
Materials from hotel/campground	10%	8%
Booking website/app	7%	7%
VisitMaine.com	9%	6%
Airline website/app	6%	6%
Chambers of Commerce	2%	2%
Other	4%	3%
None	35%	39%

ACTIVITIES*

Activities	2022	2023
Food/beverage/culinary	59%	63%
Touring/sightseeing	48%	45%
Active outdoor activities	45%	40%
Shopping	33%	39%
Water activities	22%	18%
History/culture	17%	15%
Astrotourism	11%	11%
Entertainment/attractions	6%	6%
Business conference/meeting	7%	6%
Other	9%	7%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2022	2023
Going to local brew pubs/craft breweries	26%	27%
Ate lobster	23%	21%
Ate other local seafood	21%	19%
Consumed other locally produced Maine foods	14%	17%
Enjoyed unique Maine food or beverages	12%	16%
Enjoying local food at fairs/festivals	8%	10%
Visited Farmer's Markets	6%	8%
Enjoyed high-end cuisine or five-star dining	6%	7%
Ate farm-to-table or organic cuisine	5%	5%
Other	6%	8%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2022	2023
Sightseeing	35%	33%
Enjoying the ocean views/rocky coast	25%	27%
Enjoying the mountain views	30%	26%
Driving for pleasure	28%	21%
Wildlife viewing/bird watching	16%	14%
Photography	12%	13%
Nature cruises or tours	11%	11%
Viewing fall colors	8%	7%
Tours of communities/local architecture	7%	6%
Other	1%	1%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2022	2023
Hiking/climbing/backpacking	30%	26%
Exploring State and National Parks	21%	16%
Snowmobiling	6%	6%
Alpine skiing/snowboarding	3%	5%
Camping	6%	4%
Riding all-terrain vehicles	3%	4%
Bicycling touring	3%	3%
Snowshoeing	4%	3%
Hunting	3%	2%
Nordic skiing	2%	2%
Mountain/Fat Biking	1%	1%
Other	3%	3%

SHOPPING ACTIVITIES*

Shopping Activities	2022	2023
Shopping at malls	17%	23%
Shopping for gifts/souvenirs	9%	14%
Outlet shopping	9%	11%
Shopping for antiques/local arts and crafts	9%	9%
Shopping in downtown areas	9%	9%
Shopping for unique/locally produced goods	9%	8%
Shopping for "Made in Maine" products	8%	6%
Other	2%	2%

*Multiple responses permitted.

WATER ACTIVITIES*

Water Activities	2022	2023
Fishing	11%	9%
Canoeing/kayaking	10%	8%
Motor boating	9%	8%
Outdoor swimming	8%	6%
Going to the beach	7%	4%
Sailing	2%	2%
Water skiing/jet skiing	2%	2%
Pool swimming	3%	1%
White water rafting	1%	1%
Surfing	1%	1%
Other	1%	1%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2022	2023
Visit historic sites/museums	9%	9%
Visit art museums/local artisan studios	3%	6%
Get to know the local people and/or culture	7%	6%
Attend plays/musicals/theatrical events	1%	3%
Attend popular music concerts/events	3%	3%
Painting/drawing/sketching	3%	3%
Attend operas/classical music events	2%	1%
Other	2%	2%

ENTERTAINMENT ACTIVITIES*

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

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2022	2023
No other states/provinces	76%	77%
New Hampshire	11%	8%
Massachusetts	8%	6%
New York	6%	5%
New Brunswick	3%	5%
Vermont	5%	3%
Connecticut	3%	2%
Rhode Island	2%	2%
Nova Scotia	1%	2%
Prince Edward Island	1%	2%
Ontario	1%	1%
Quebec	1%	1%
Newfoundland and Labrador	1%	<1%
Other	3%	4%

TRAVELING IN MAINE*

Maine Regions Visited	2022	2023
No other regions	32%	44%
DownEast & Acadia	37%	36%
Midcoast & Islands	17%	13%
Greater Portland & Casco Bay	14%	12%
The Maine Beaches	11%	8%
Kennebec Valley	11%	7%
Maine Lakes & Mountains	11%	6%
Aroostook County	10%	5%
Other	1%	1%

VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2022	2023
Would recommend Maine	95%	96%
Would not recommend Maine	1%	1%
Not sure	4%	3%

Recommending Regions	2022	2023
Definitely recommend region	71%	75%
Probably would recommend region	16%	12%
Would not recommend region	1%	1%
Not sure	12%	12%

RETURNING TO MAINE

Returning to Maine

2022

2023

Definitely will return	75%	78%
Probably will return	18%	17%
Probably will not return	1%	1%
Not sure	6%	4%

SATISFACTION

Satisfaction	2022	2023
Very satisfied	72%	79%
Satisfied	23%	19%
Dissatisfied	1%	<1%
Don't know	4%	2%

TRIP EXPECTATIONS

Exceeded Expectations	2022	2023
Friendliness of people	60%	62%
Activities & attractions	56%	54%
Authentic & unique communities	50%	49%
Customer service	50%	47%
Restaurants	43%	43%
Lodging	43%	41%
Value for your money	37%	37%
Shopping	35%	33%

OVERCROWDING

Overcrowding	2022	2023
Overcrowded	3%	2%
A little overcrowded	15%	12%
The number of visitors was fine	43%	48%
Not at all overcrowded	35%	37%
Other	4%	1%

STUDY METHODS



METHODOLOGY



Visitor Tracking

568 interviews were completed with visitors to Maine Highlands 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 Highlands is a function of direct spending by visitors to Maine Highlands, 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 Highlands. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Maine Highlands's multiplier is 1.62.

MAINE HIGHLANDS

2023 Economic Impact & Visitor Tracking Report

DECEMBER 2022 – NOVEMBER 2023

Downs & St. Germain Research
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dsg-research.com

