

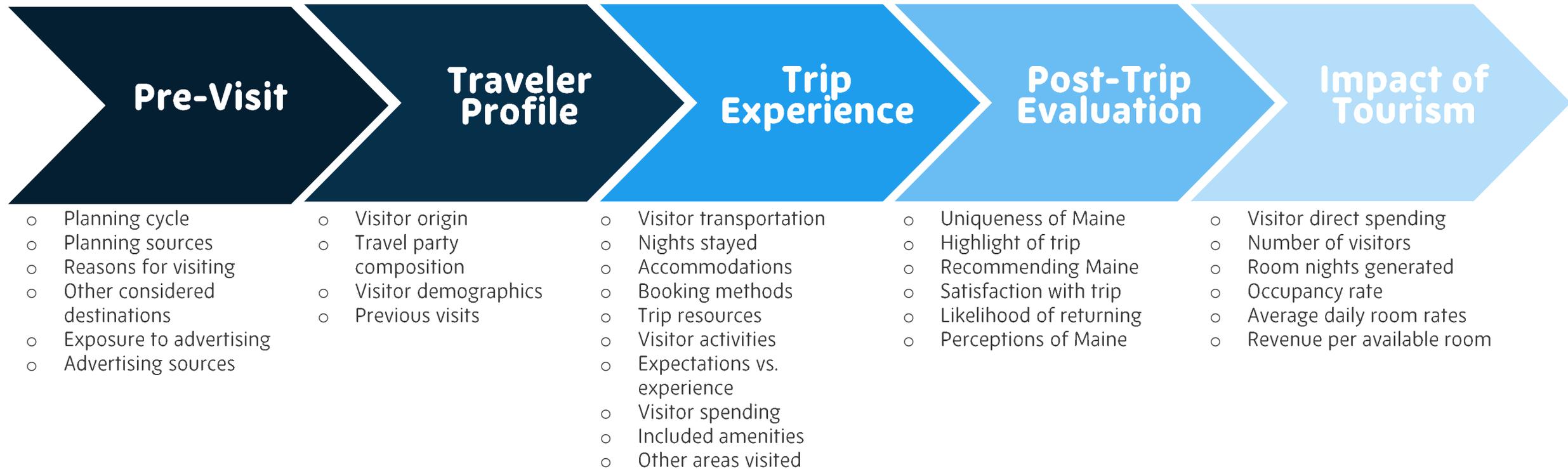
GREATER PORTLAND & CASCO BAY

2024 Economic Impact & Visitor Tracking Report
DECEMBER 2023 – NOVEMBER 2024



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Maine from December 2023 to November 2024. 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.



EXECUTIVE SUMMARY



GREATER PORTLAND & CASCO BAY

Compared to visitors to other regions, visitors to the Greater Portland & Casco Bay region are more likely to:

- » Use VisitPortland.com as a planning resource
- » Visit Maine for its shopping opportunities
- » Be first-time visitors
- » Visit from out of state
- » Fly into Maine rather than driving



VISITOR JOURNEY: IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$2,924,143,600

in economic impact to Greater Portland & Casco Bay's economy, up 5.2% from 2023



DIRECT SPENDING

Visitors to Greater Portland & Casco Bay spent

\$1,763,884,100

throughout the area in 2024 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up 12.6% from 2023



VISITORS

Greater Portland & Casco Bay attracted

2,807,900

visitors in 2024, down 3.8% from 2023



*There were fewer visitors staying in second homes or with friends/relatives in 2024 resulting in fewer visitors overall.

Greater Portland & Casco Bay

VISITORS DAYS*

All visitors to Greater Portland & Casco Bay
spent

12,712,700

days in Greater Portland & Casco Bay
throughout 2024, down 8.4% from 2023



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

Greater Portland & Casco Bay

ROOM NIGHTS

Visitors to Greater Portland & Casco Bay
generated

2,471,900

nights in Greater Portland & Casco Bay
accommodations throughout 2024, down
2.7% from 2023



JOBS SUPPORTED

Visitors to Greater Portland & Casco Bay supported

20,200

jobs throughout the area in 2024, up 9.2% from 2023*



*2023 figure has been updated due to revised IMPLAN models.



WAGES SUPPORTED

Visitors to Greater Portland & Casco Bay supported

\$1,055,749,100

in wages paid to Greater Portland & Casco Bay employees in 2024, up 12.9% from 2023*



*2023 figure has been updated due to revised IMPLAN models.

VISITORS SUPPORT JOBS

Every
139

visitors supports a new job in Greater
Portland & Casco Bay



HOUSEHOLD SAVINGS

Visitors to Greater Portland & Casco Bay
saved local households

\$2,331

in state and local taxes in 2024



LODGING METRICS*

Occupancy Rate

61.1%

+ 1.3% from 2023

Average Daily Rate

\$207.52

+ 6.2% from 2023

Revenue per Available Room

\$126.74

+ 7.6% from 2023

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

Greater Portland & Casco Bay

15

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » **60%** of visitors started planning their trip less than 3 months in advance
- » **68%** of visitors have a booking window of less than 3 months



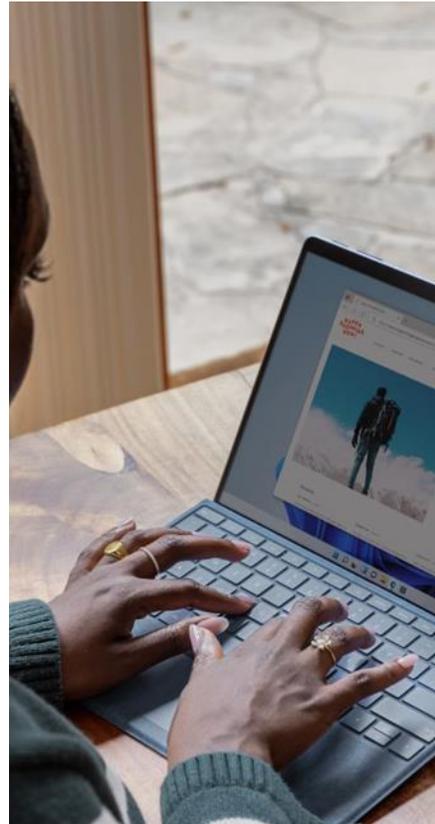
TOP TRIP PLANNING SOURCES*



32% Advice from family/friends



28% VisitMaine.com



25% Online search engines



25% VisitPortland.com



25% Travel guides/brochures

TOP REASONS FOR VISITING*



35% Sightseeing and touring



28% Relax and unwind



21% Visit friends/family

CONSIDERING MAINE AS A DESTINATION

- » Nearly **2 in 3** visitors considered visiting **ONLY** Maine while planning their trips (+9% points from 2023)
- » **1 in 5** visitors also 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

- » 5% of visitors said a TV show or film inspired their tip to Maine
- » 42% of visitors who were inspired by a TV show or film said it made them think about Maine as a place to visit

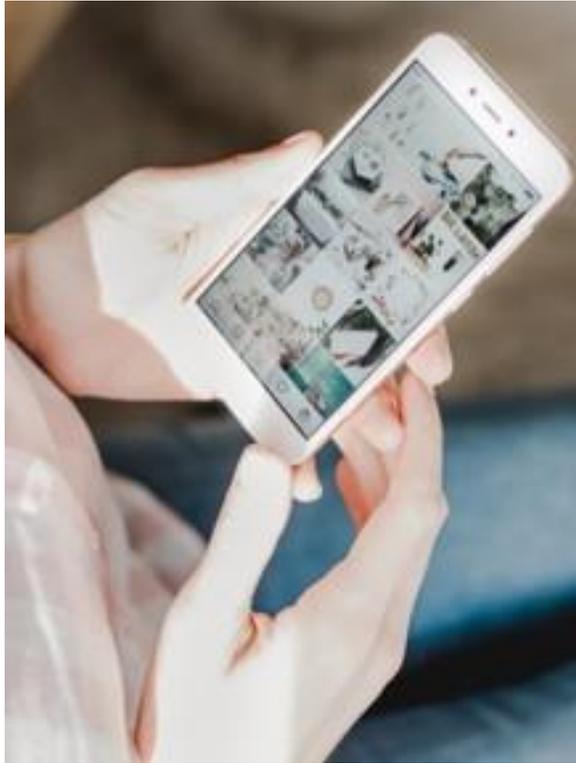


PRE-TRIP RECALL OF ADVERTISING

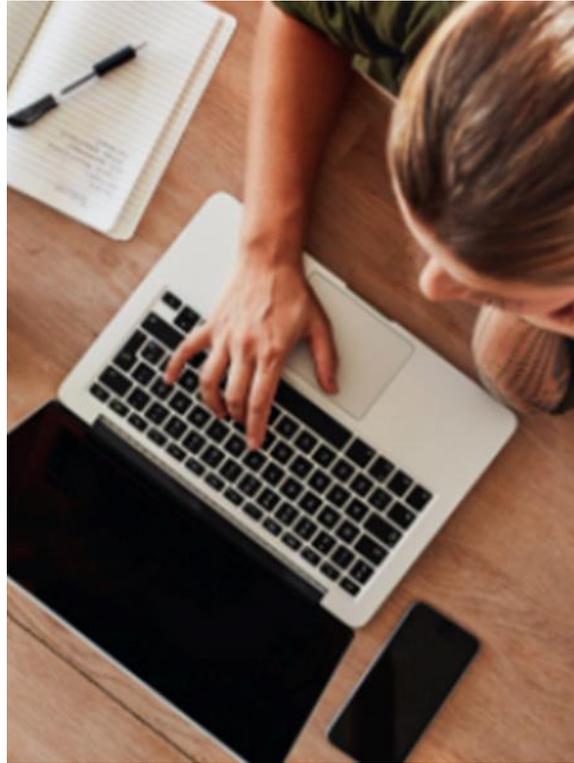
- » 2 in 5 visitors recalled advertising or promotions for Maine prior to their trip (-7% points from 2023)
- » This information influenced 17% of all visitors to visit Maine (-13% points from 2023)



TOP SOURCES OF ADVERTISING RECALL*



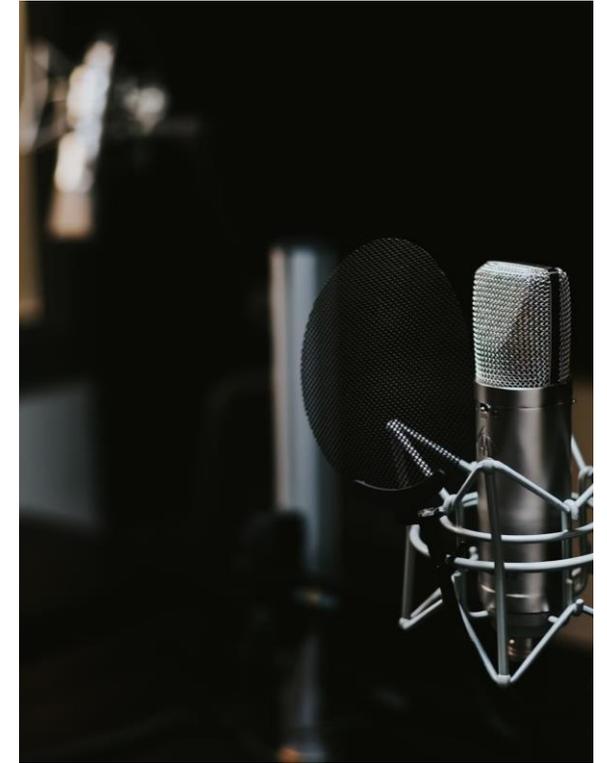
54% Social media



29% Internet



20% Magazine

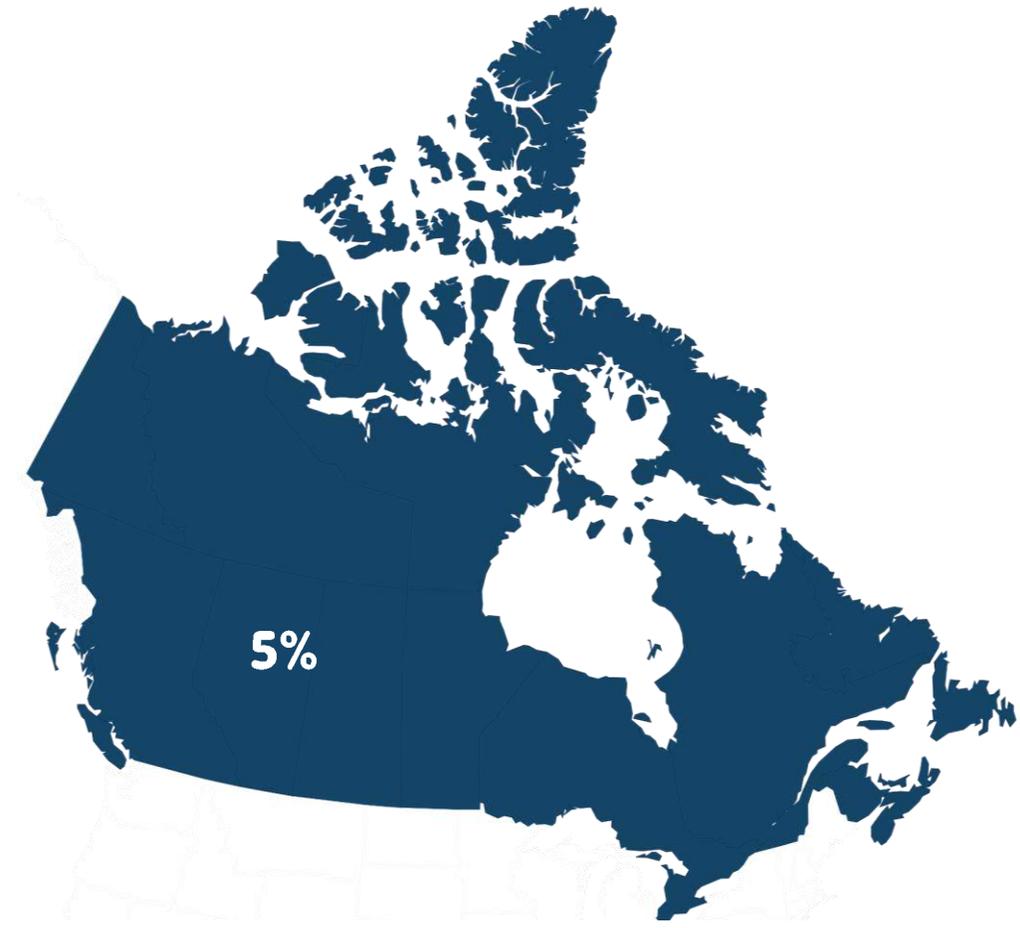
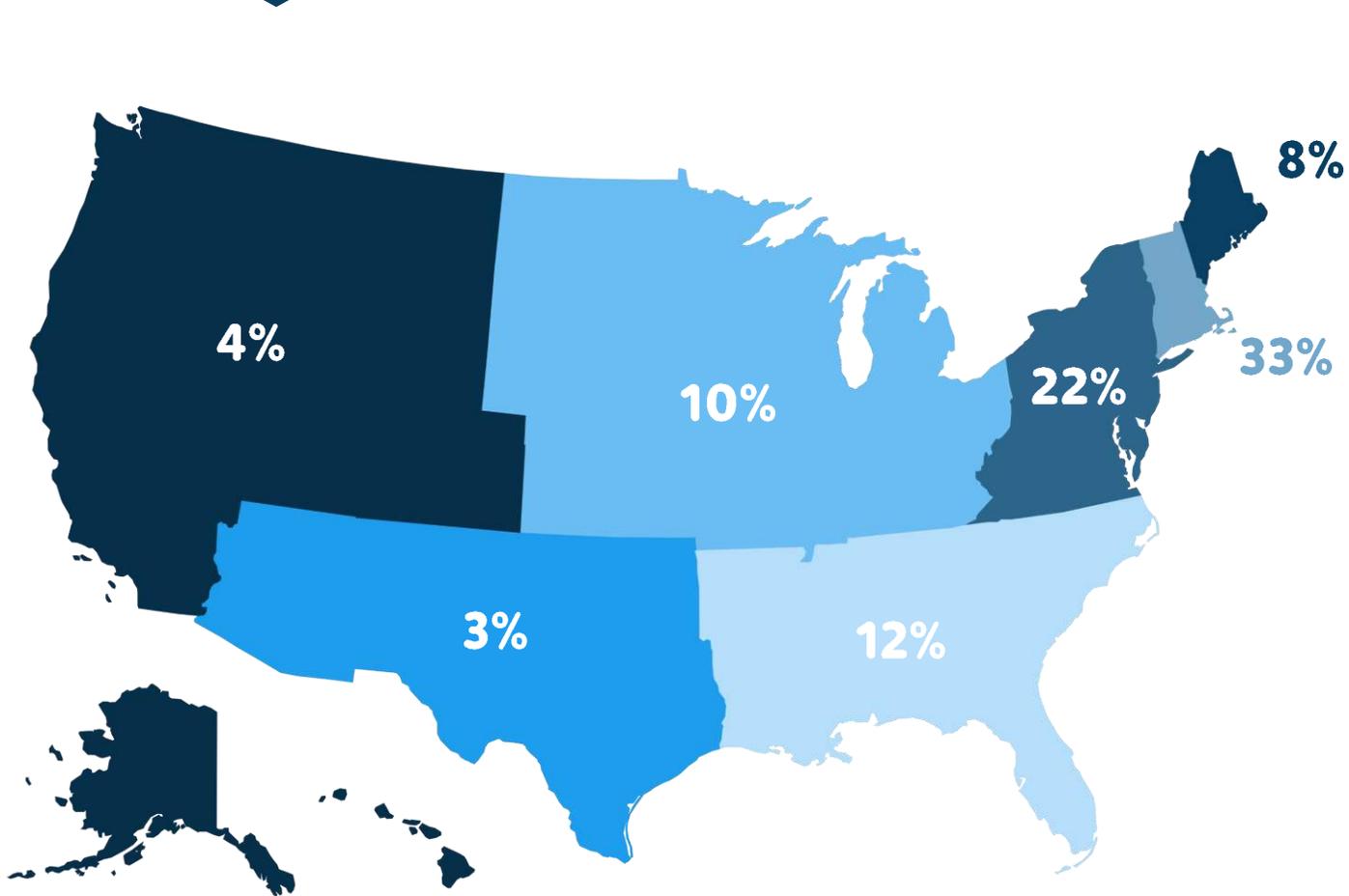


19% Radio

VISITOR JOURNEY: TRAVELER PROFILE



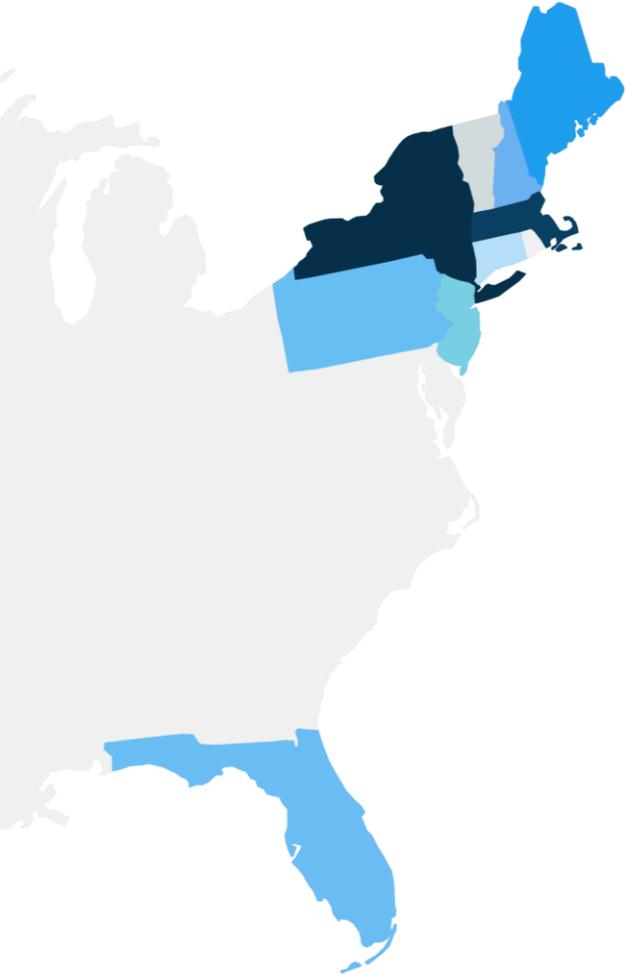
REGIONS OF ORIGIN



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

5% of visitors came from Canada.

TOP ORIGIN STATES & PROVINCES



59%

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

- 16 % Massachusetts
- 9 % New York
- 8 % Maine
- 6 % Connecticut
- 6 % New Hampshire
- 5 % Pennsylvania
- 5 % Florida
- 4 % New Jersey

TOP ORIGIN MARKETS



8% Boston



8% New York City¹



3% 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



16% of visitors traveled with at least one person under the age of 18 in their travel party



VISITOR PROFILE

» The typical Maine visitor:

- » Is **49** years old¹
- » Is white – **83%**
- » Is a college graduate – **82%**
- » Is married/in a domestic partnership – **79%**
- » Is employed full-time – **61%**
- » Has an annual household income² of **\$110,400**



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 30% had previously traveled in Maine more than 10 times



VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

- » Maine is a drive-market for most visitors, with **72%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport or Boston Logan International Airport



NIGHTS STAYED

- » 82% of visitors stayed one or more nights in Maine on their trip (+1% point from 2023)
- » Typical visitors stayed 4.5* nights in Maine on their trips



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

Greater Portland & Casco Bay

TOP ACCOMMODATIONS



37% Hotel/motel/resort



20% Friends/family home



18% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*



55% Navigation website/apps (i.e., Google or Apple Maps, etc.)



30% Visitor Information Centers



28% Materials from hotel/campground

TOP VISITOR ACTIVITIES*



76% Food/beverage/culinary



62% Touring/sightseeing



62% Shopping

VISITING OTHER STATES & PROVINCES

- » Nearly **3 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » About **1 in 5** visitors visited New Hampshire or Massachusetts during their trip
- » Visitors continued to be more likely to visit U.S. states near Maine than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE

- » Over **3 in 10** visitors visited Maine's Midcoast and Islands in addition to their primary destination within the state
- » Nearly **half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+**15%** points from 2023)



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 – **79%** would definitely recommend (**+9%** points from 2023)



LIKELIHOOD OF RETURNING TO MAINE

- » **91%** of visitors will return to Maine for a future visit or vacation
- » **72%** of visitors were highly satisfied with their trip in Maine and will “definitely return” in the future



SATISFACTION

- » 97% of visitors were satisfied with their trip to Maine
- » 70% were very satisfied with their trip to Maine (+9% points from 2023)



OVERCROWDING

- » 53% of visitors thought the number of visitors during their trip to Maine was fine (+4% points from 2023)
- » 25% of visitors thought it was a little overcrowded (-5% points from 2023)
- » 16% of visitors thought Maine was not overcrowded at all



DETAILED FINDINGS



VISITOR JOURNEY: IMPACT OF TOURISM



KEY PERFORMANCE INDICATORS

Economic Impact	2022	2023	2024	Δ% from '23
Number of Visitors	2,541,800	2,917,900	2,807,900	- 3.8%
Visitor Days*	11,537,400	13,872,800	12,712,700	- 8.4%
Room nights generated	2,351,400	2,539,600	2,471,900	- 2.7%
Direct expenditures	\$1,369,395,400	\$1,566,110,300	\$1,763,884,100	+ 12.6%
Total economic impact	\$2,411,969,300	\$2,780,627,400	\$2,924,143,600	+ 5.2%

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

EMPLOYMENT IMPACTS

Greater Portland & Casco Bay Jobs	2022	2023*	2024	Δ% from '23
Jobs supported (direct)	13,900	13,200	14,500	+ 9.8%
Total jobs supported	19,280	18,500	20,200	+ 9.2%

Greater Portland & Casco Bay Wages	2022	2023*	2024	Δ% from '23
Wages paid (direct)	\$575,770,900	\$565,802,300	\$639,934,500	+ 13.1%
Total wages paid	\$929,739,700	\$934,845,300	\$1,055,749,100	+ 12.9%

*2023 figures have been updated due to revised IMPLAN models.

RETURN ON INVESTMENT

Return on Investment	2022	2023*	2024
Visitors per job supported	132	158	139
State & local taxes supported	\$201,120,400	\$212,980,700	\$242,481,100
Tax savings per household	\$1,995	\$2,077	\$2,331

*2023 figures have been updated due to revised IMPLAN models.

LODGING METRICS*

Lodging Metrics	2022	2023	2024	Δ% from '22
Occupancy Rate (%)	60.0%	60.3%	61.1%	+ 1.3%
Average Daily Rate	\$208.91	\$195.43	\$207.52	+ 6.2%
RevPAR	\$125.35	\$117.80	\$126.74	+ 7.6%
Total Lodging Revenue**	\$396,805,700	\$397,515,900	\$409,385,200	+ 3.0%

*Lodging metrics include all paid accommodations type like hotels, vacation rentals, B&B, etc.

Sources: Key Data & STR.

**Source: State of Maine Revenue Services.

VISITOR JOURNEY : PRE-VISIT



TRIP PLANNING CYCLE

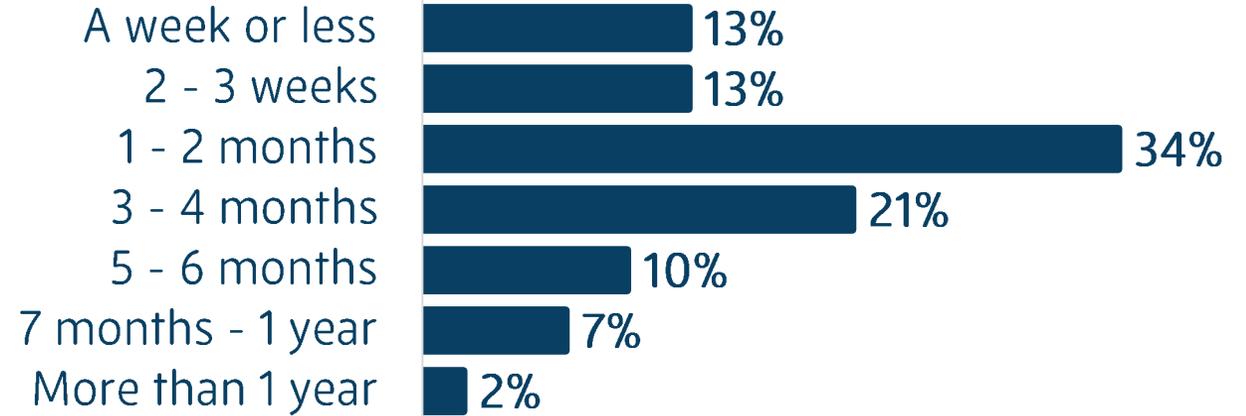
» Typical visitors began planning their trip **51 days** in advance (-8 days from 2023)

» **74%** of visitors started planning their trip a month or more in advance of their trip

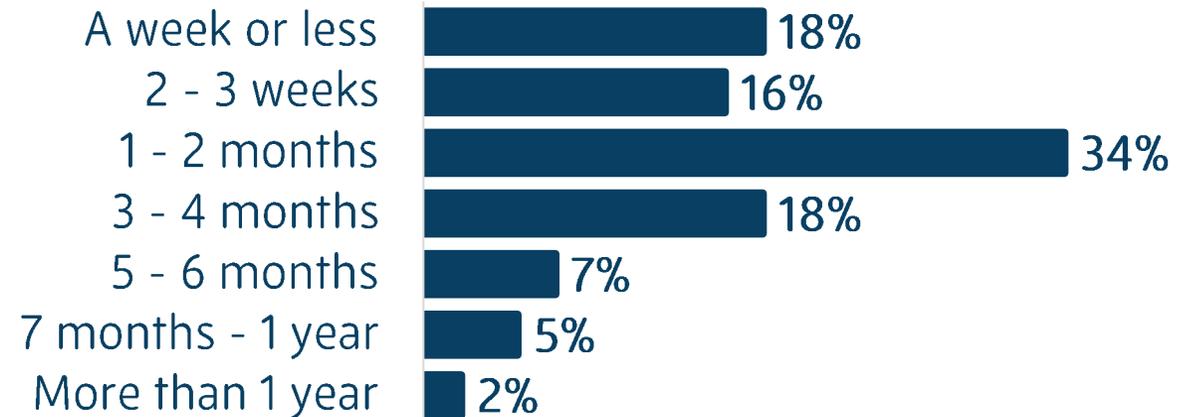
» Typical visitors booked their accommodations **44 days** in advance (-7 days from 2023)

» **68%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

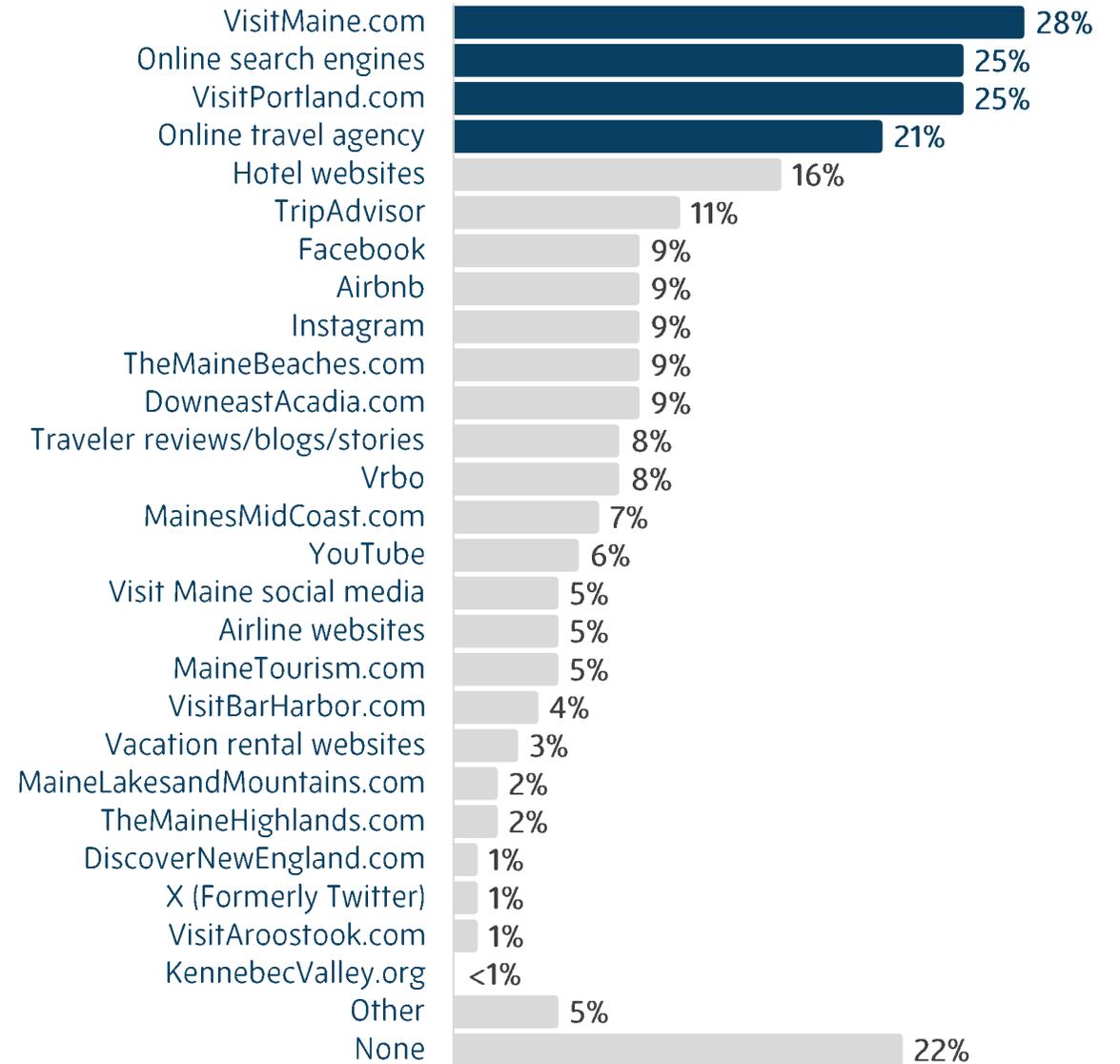


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

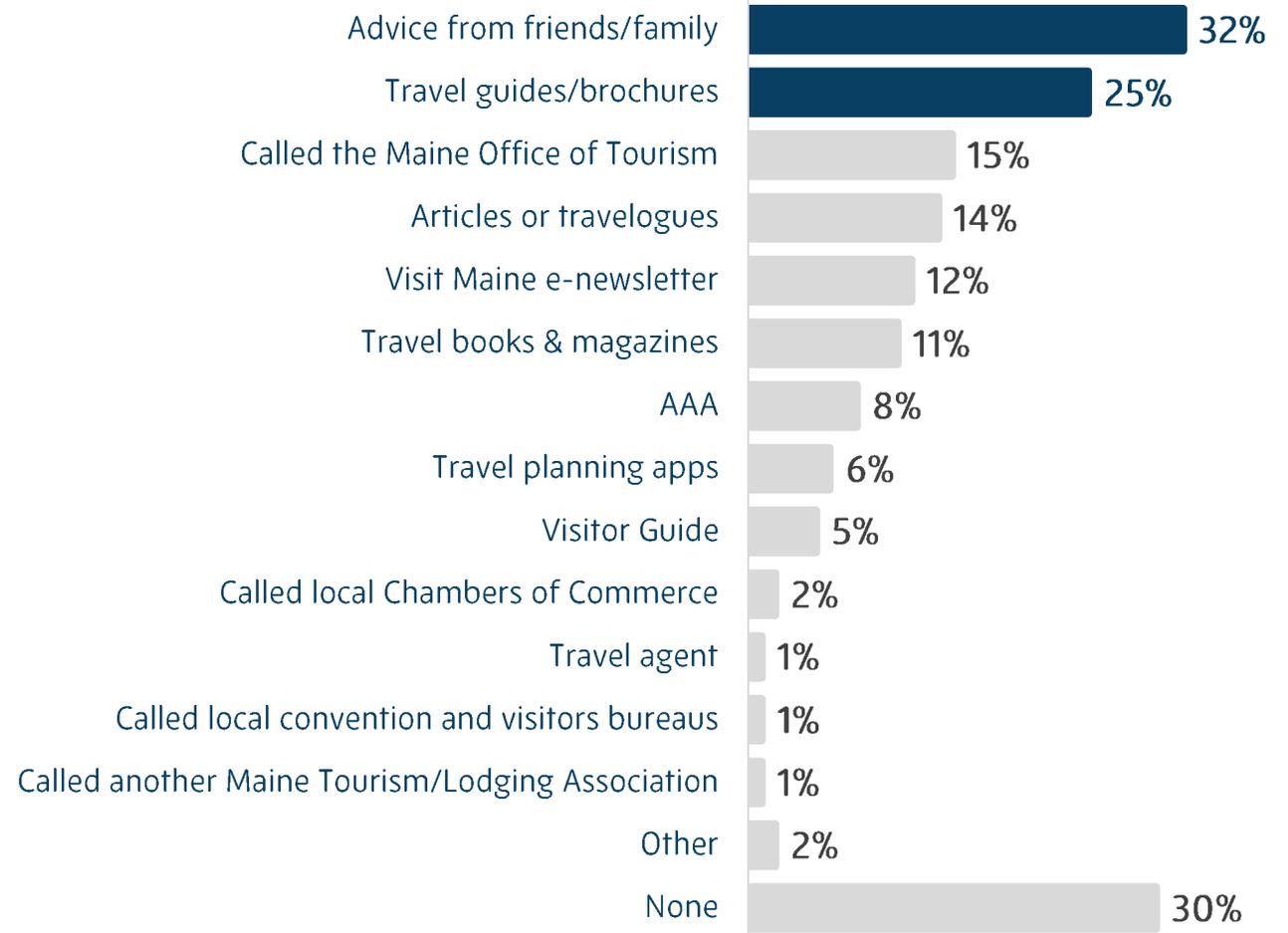
- » Nearly **4 in 5** visitors used one or more online resources to help them plan their trip in Maine
- » Nearly **3 in 10** visitors used VisitMaine.com to help them plan their trip (+10% points from 2023)
- » **1 in 4** visitors used an online search engine, such as Google (-9% points from 2023), or went to VisitPortland.com (+11% points from 2023)
- » Over **1 in 5** visitors used an online travel agency to help them plan their trip to Maine



*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

- » Nearly **1 in 3** visitors relied on advice from their friends and family to help them plan their trip in Maine (-6% points from 2023)
- » **1 in 4** visitors used travel articles or brochures to help plan their trip in Maine (+8% points from 2023)
- » **3 in 10** visitors did not use any other resources to help them plan their trip in Maine



REASONS FOR VISITING*

- » Over **1 in 3** visitors came to Maine for sightseeing/touring
- » Nearly **3 in 10** visitors came to relax and unwind
- » Around **1 in 5** came to visit friends and family, shop, or enjoy Maine's nature and bird-watching



TV SHOWS & FILM

- » 5% of visitors said a TV show or film inspired their trip to Maine
- » 42% of visitors who were inspired by a TV show or film said it made them think about Maine as a place to visit
- » 4% 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: 5% of visitors who were inspired by a TV show or film

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

42%

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

34%

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

12%

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

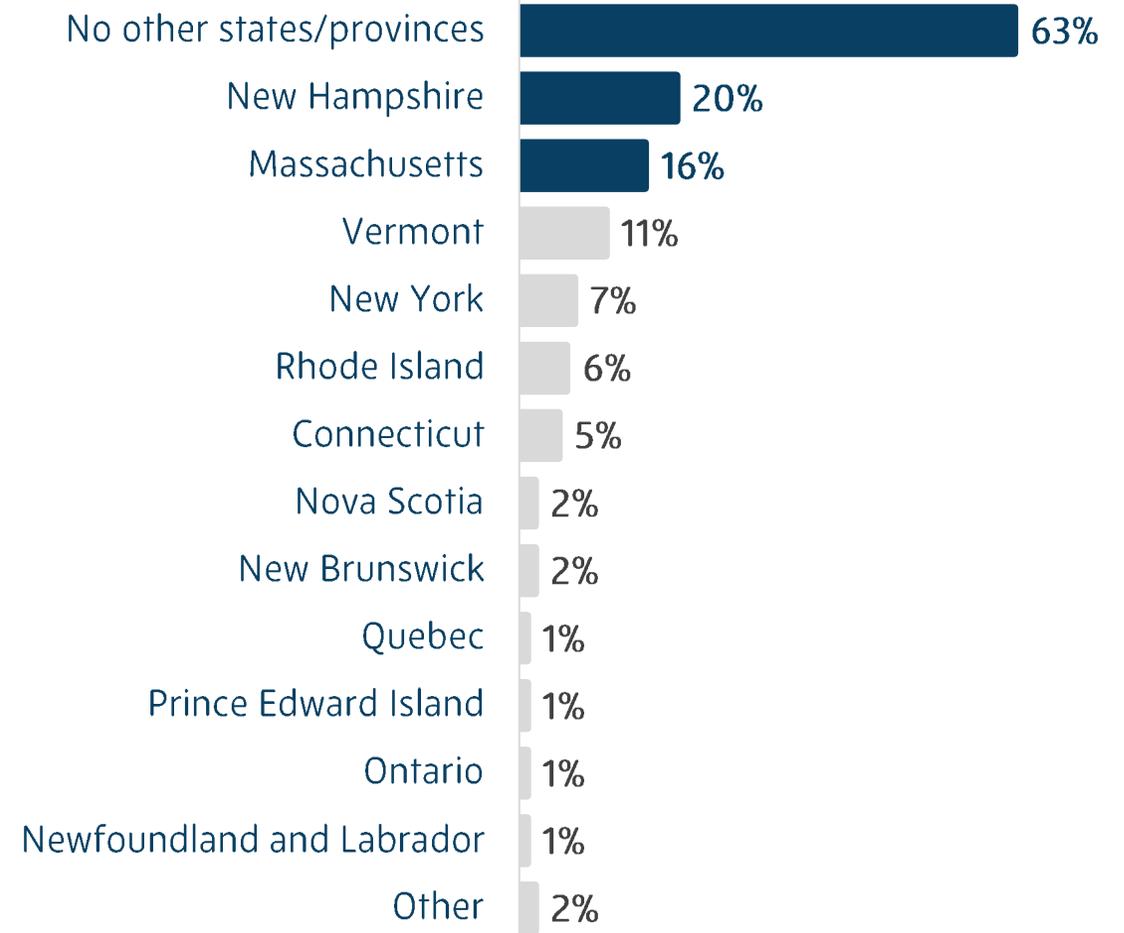
3%

Something else

9%

OTHER STATES & PROVINCES CONSIDERED*

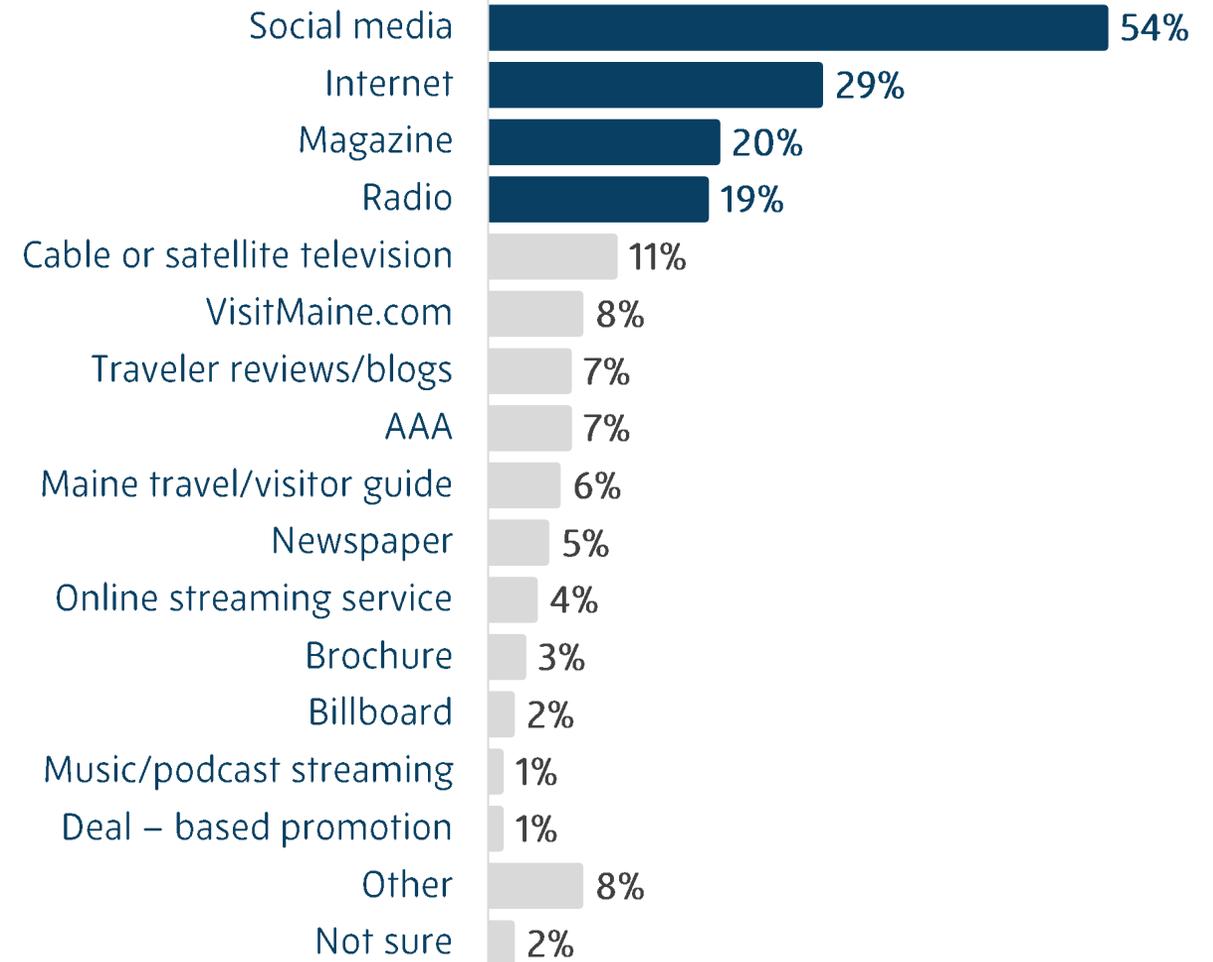
- » Nearly **2 in 3** visitors **ONLY** considered visiting Maine while planning their trips (+9% points from 2023)
- » **1 in 5** visitors considered visiting New Hampshire while planning their trips
- » Another **1 in 6** considered visiting Massachusetts
- » Like last year, visitors were more likely to consider visiting nearby U.S. states than Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

- » **2 in 5** visitors recalled advertising or promotions for Maine prior to their trip (-7% points from 2023)
- » Over **half** of visitors who recalled this advertising saw it on social media
- » Nearly **3 in 10** noticed ads on the Internet (-10% points from 2023)
- » Around **1 in 5** noticed ads in a magazine (-7% points from 2023) or on the radio (+12% points from 2023)
- » This information influenced **17% of all visitors** to visit Maine (-13% points from 2023)

Base: 40% of visitors who noticed advertising

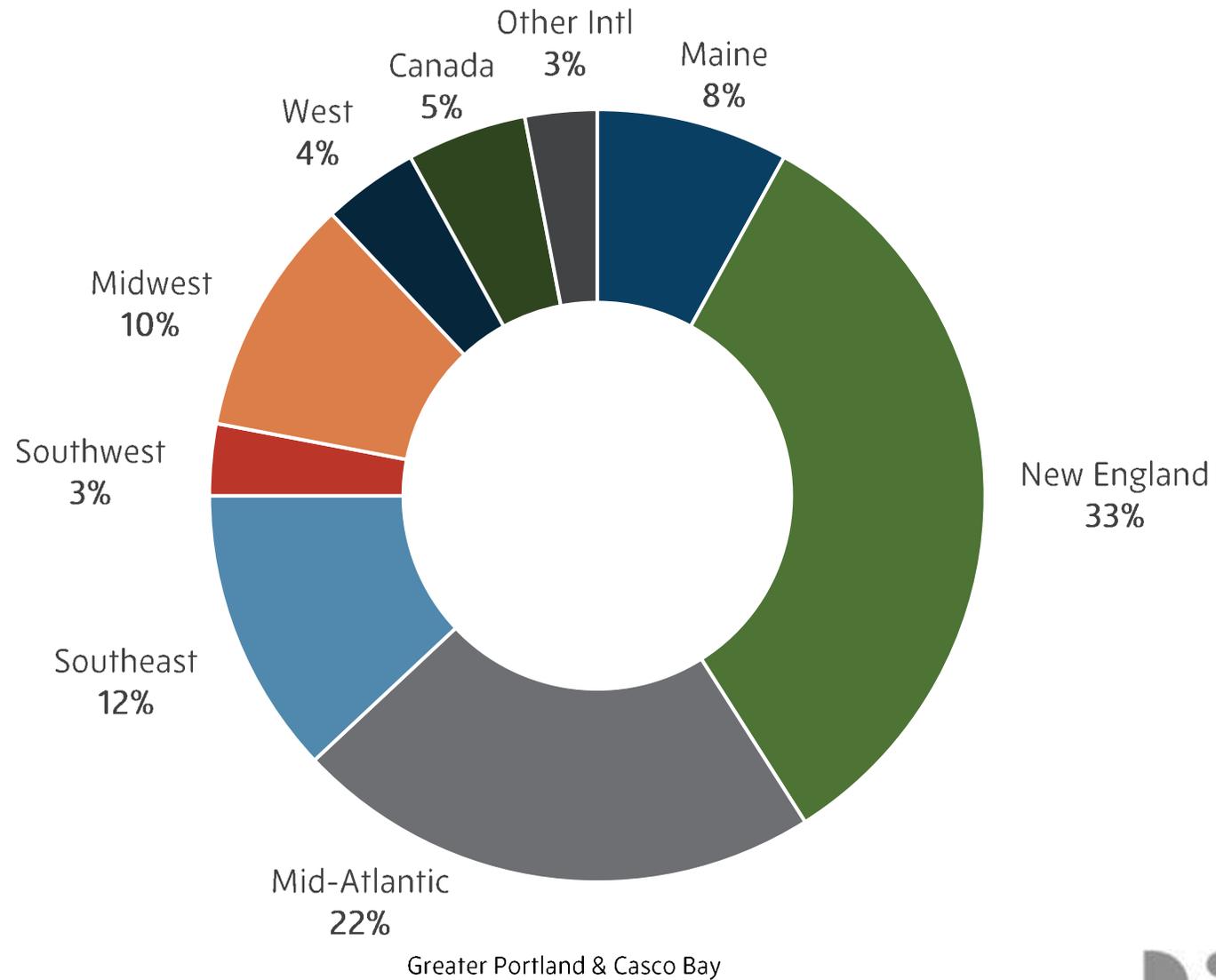


*Multiple responses permitted.

VISITOR JOURNEY : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **76%** of visitors traveled to/within Maine from 16 U.S. states and Canadian provinces
- » **8%** of visitors were residents of Maine traveling throughout the state

State/Province	Percent
Massachusetts	16%
New York	9%
Maine	8%
New Hampshire	6%
Connecticut	6%
Florida	5%
Pennsylvania	5%
New Jersey	4%
Quebec	3%
Vermont	2%
Virginia	2%
Ohio	2%
Rhode Island	2%
Texas	2%
California	2%
Georgia	2%

TOP ORIGIN MARKETS

- » **23%** of visitors traveled from 5 U.S. markets
- » **16%** of visitors traveled to Maine from New York City or Boston

Market	Percent
Boston	8%
New York City ¹	8%
Washington DC - Baltimore ²	3%
Providence, RI	2%
Philadelphia	2%

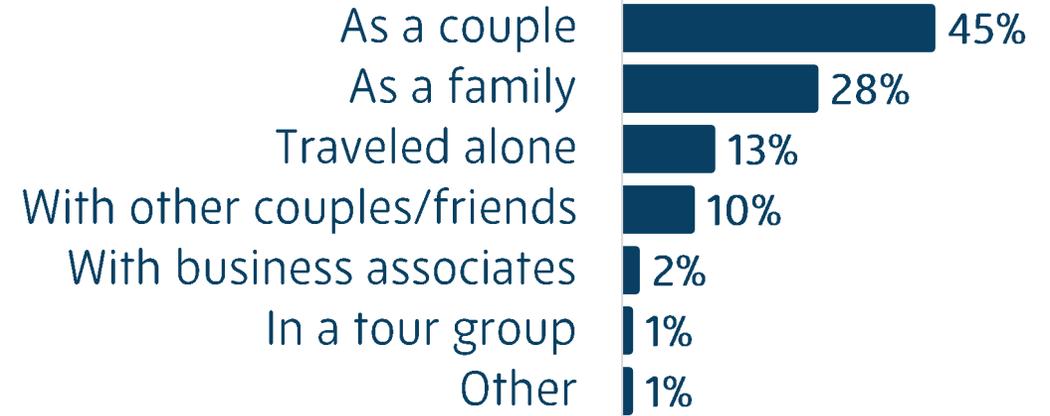
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

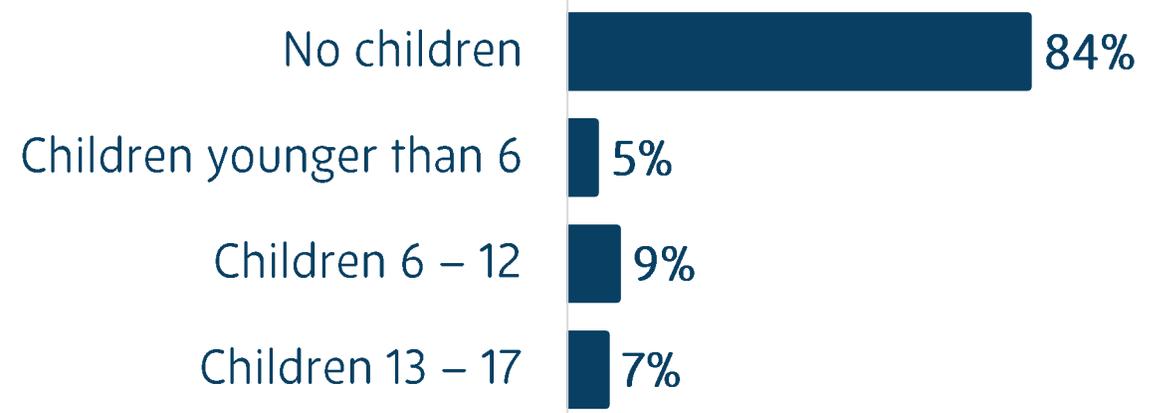
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.7** people
- » Nearly **half** of visitors traveled as a couple
- » Nearly **3 in 10** traveled as a family
- » **16%** of visitors traveled with one or more children in their travel party

Travel Party Composition



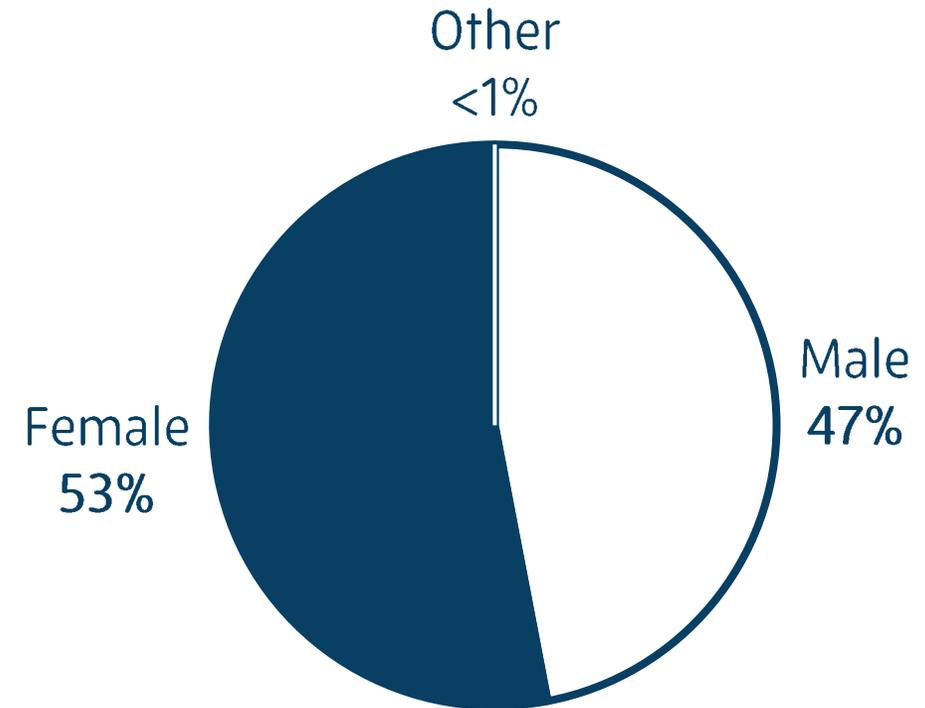
Children in Travel Party*



*Multiple responses permitted.

GENDER*

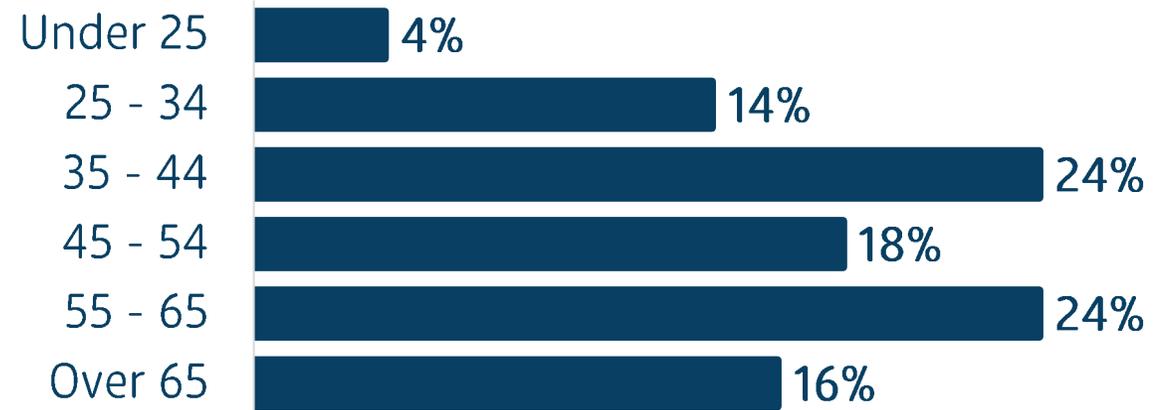
» Over **half** of visitors to Maine interviewed were females



*Gender of member of travel party surveyed. May be influenced by visitors' willingness to take a survey. The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.
Greater Portland & Casco Bay

AGE*

» The median age of visitors to Maine is **49** years old



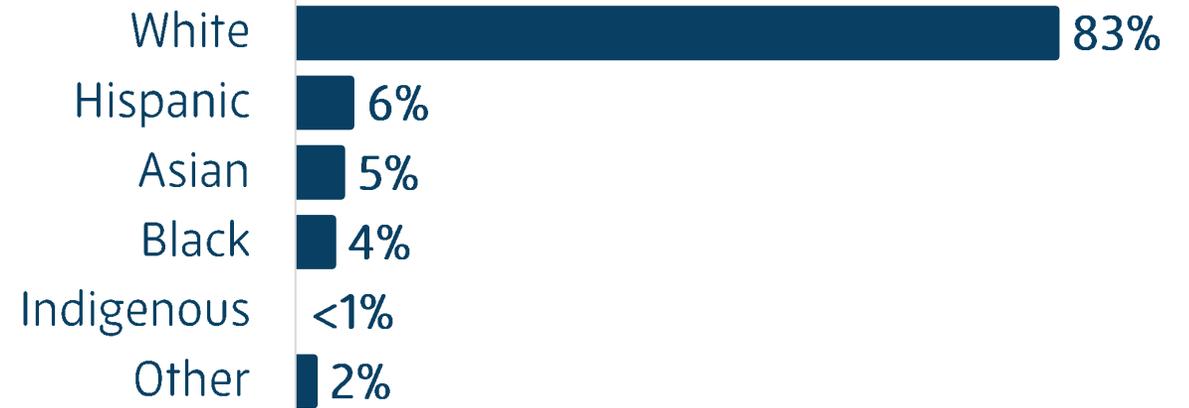
*Age of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Greater Portland & Casco Bay

RACE & ETHNICITY*

» Over 4 in 5 visitors to Maine were white



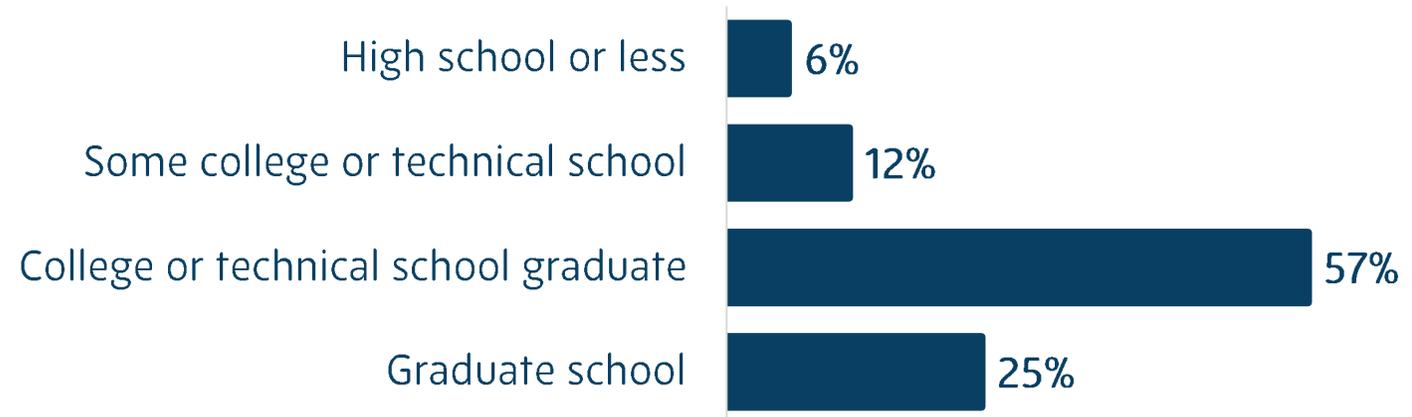
*Race/ethnicity of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Greater Portland & Casco Bay

EDUCATIONAL ATTAINMENT*

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



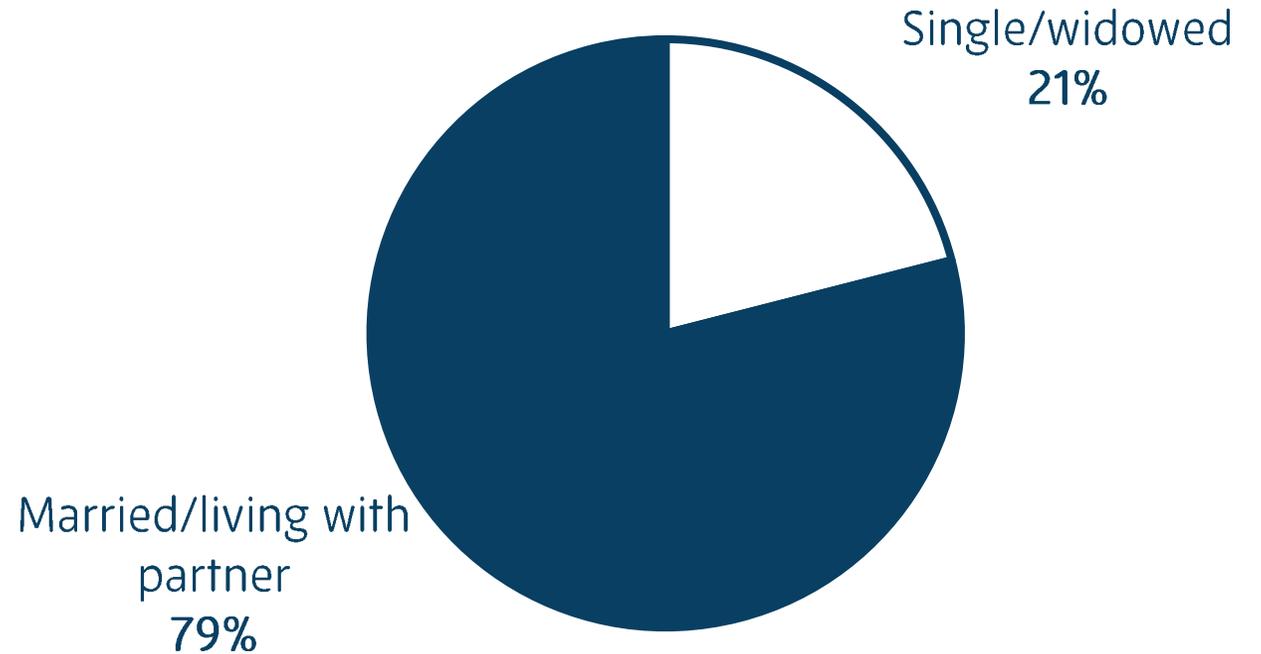
*Educational attainment of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Greater Portland & Casco Bay

MARITAL STATUS*

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



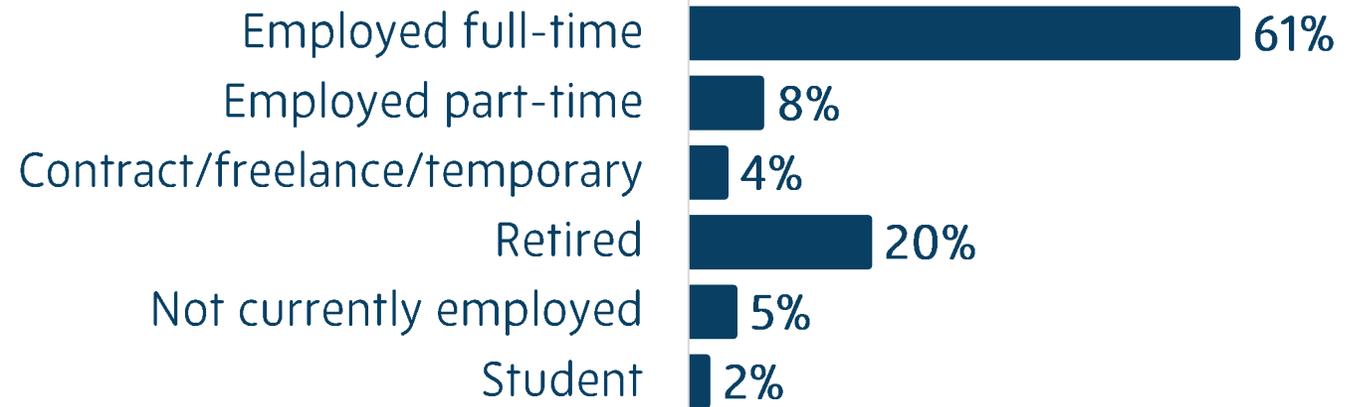
*Marital status of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Greater Portland & Casco Bay

EMPLOYMENT STATUS*

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



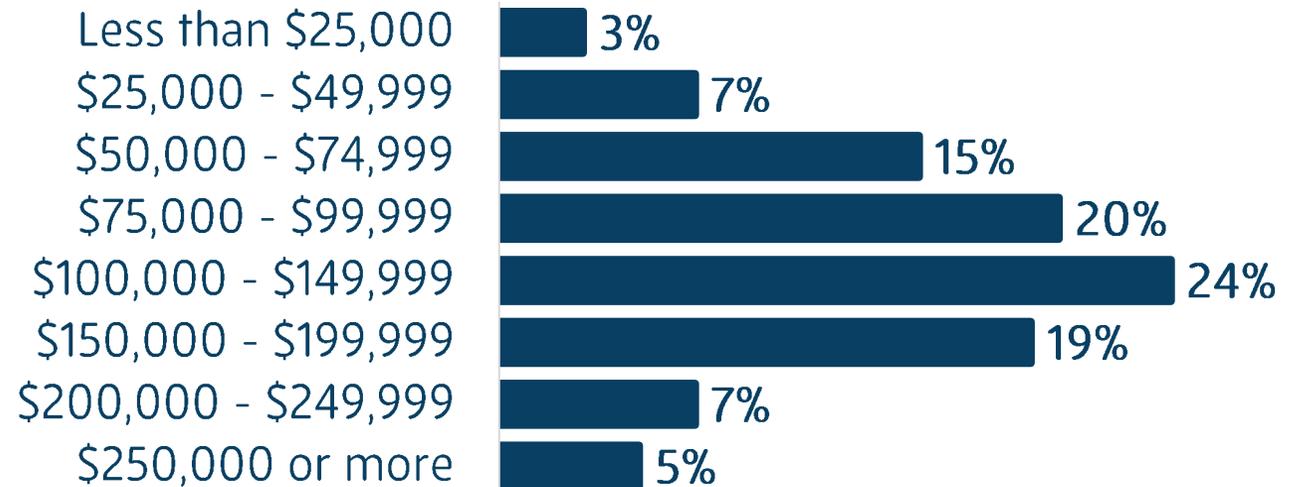
*Employment status of member of travel party surveyed.

The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.

Greater Portland & Casco Bay

HOUSEHOLD INCOME

- » The median household income of visitors to Maine is **\$110,400** per year
- » **31%** 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 30% had been to Maine more than 10 times (+6% points from 2023)

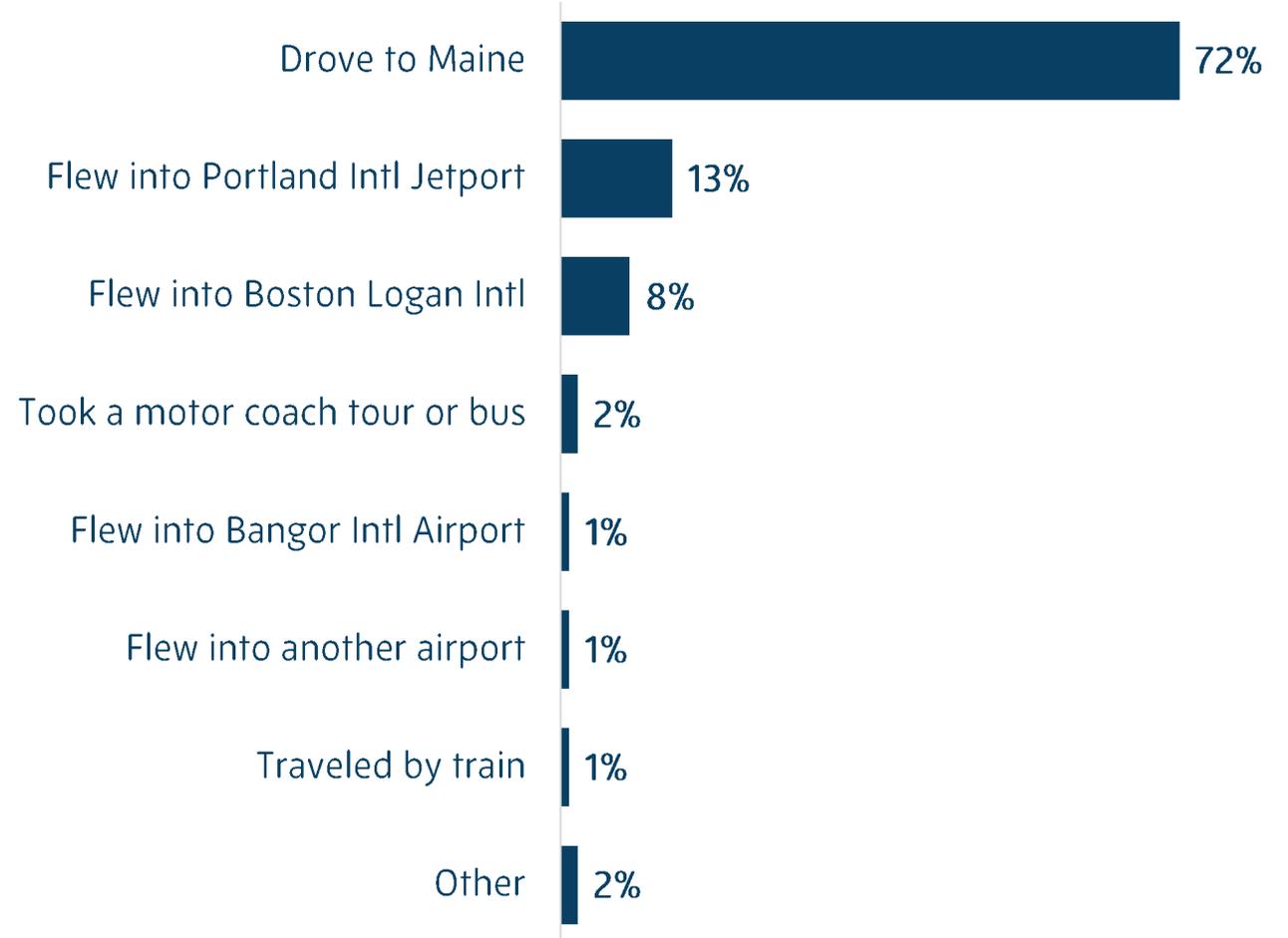


VISITOR JOURNEY : TRIP EXPERIENCE



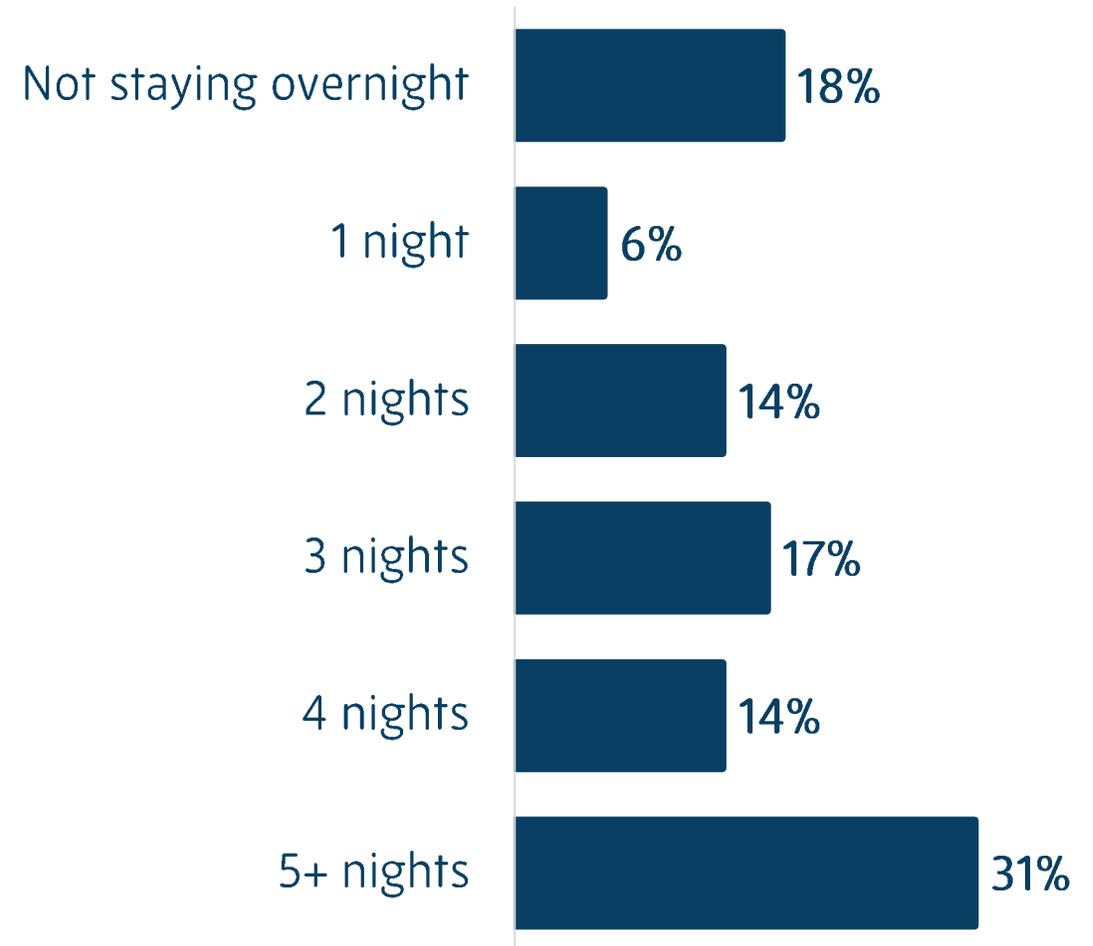
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **72%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport or Boston Logan International Airport



NIGHTS STAYED

- » 82% of visitors stayed one or more nights in Maine on their trip (+1% point from 2023)
- » Typical visitors stayed 4.5* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 4.5 nights in Maine on their trips



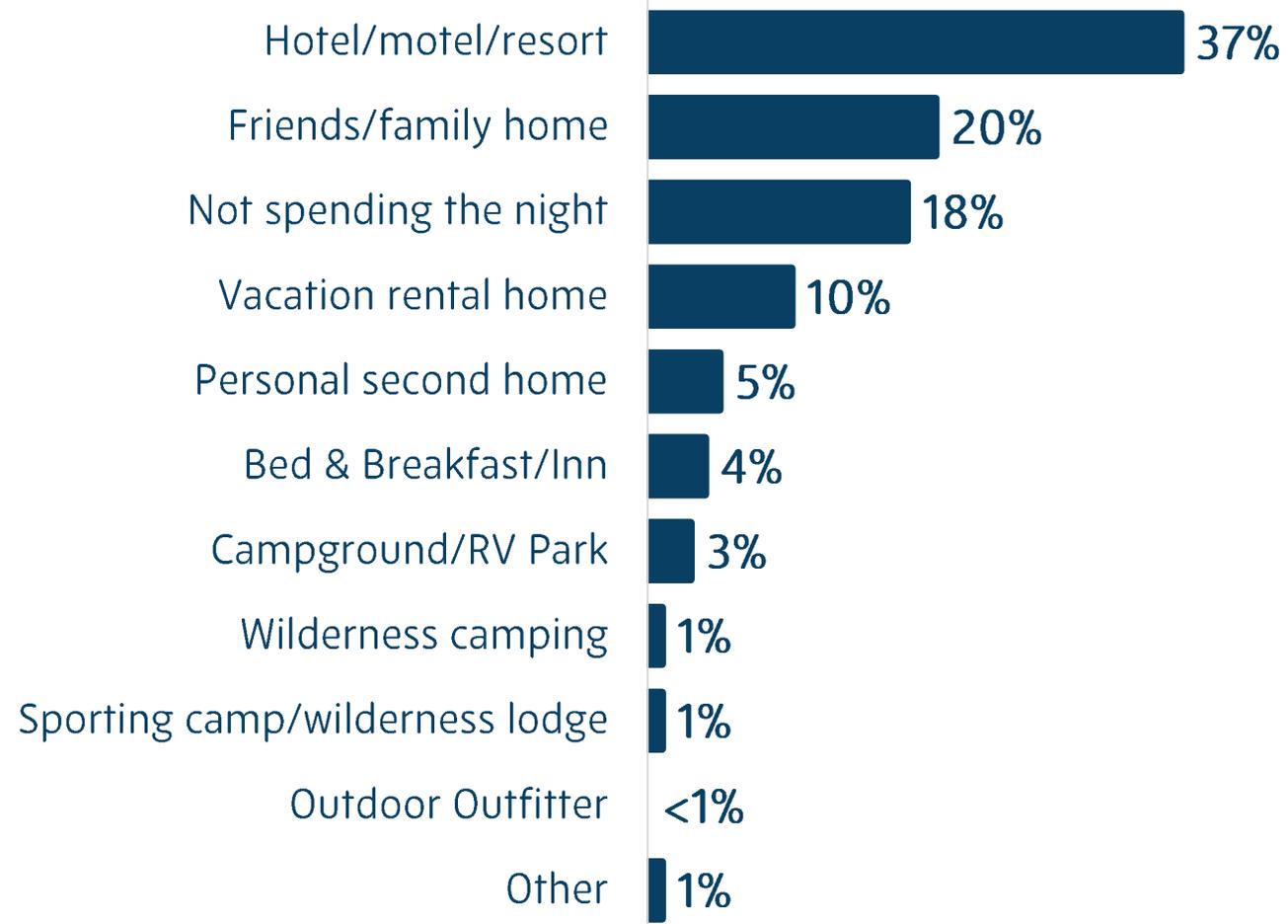
*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Greater Portland & Casco Bay

ACCOMMODATIONS

» Nearly **2 in 5** visitors stayed overnight at a hotel/motel/resort (+4% points from 2023)

» **1 in 5** visitors stayed with friends and family (-1% points from 2023)



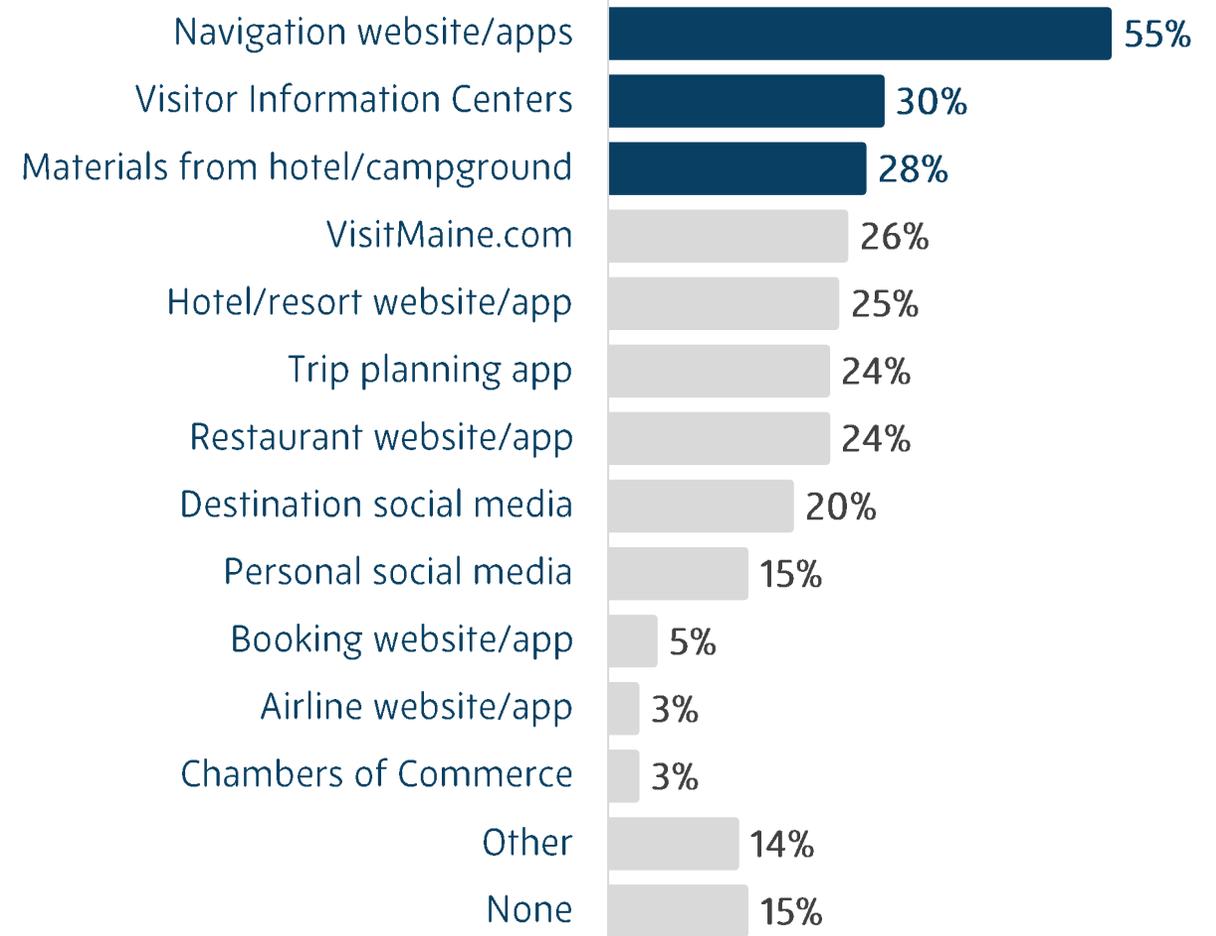
BOOKING METHODS

- » Over **1 in 3** visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo
- » **1 in 3** booked their lodging through an online travel agency



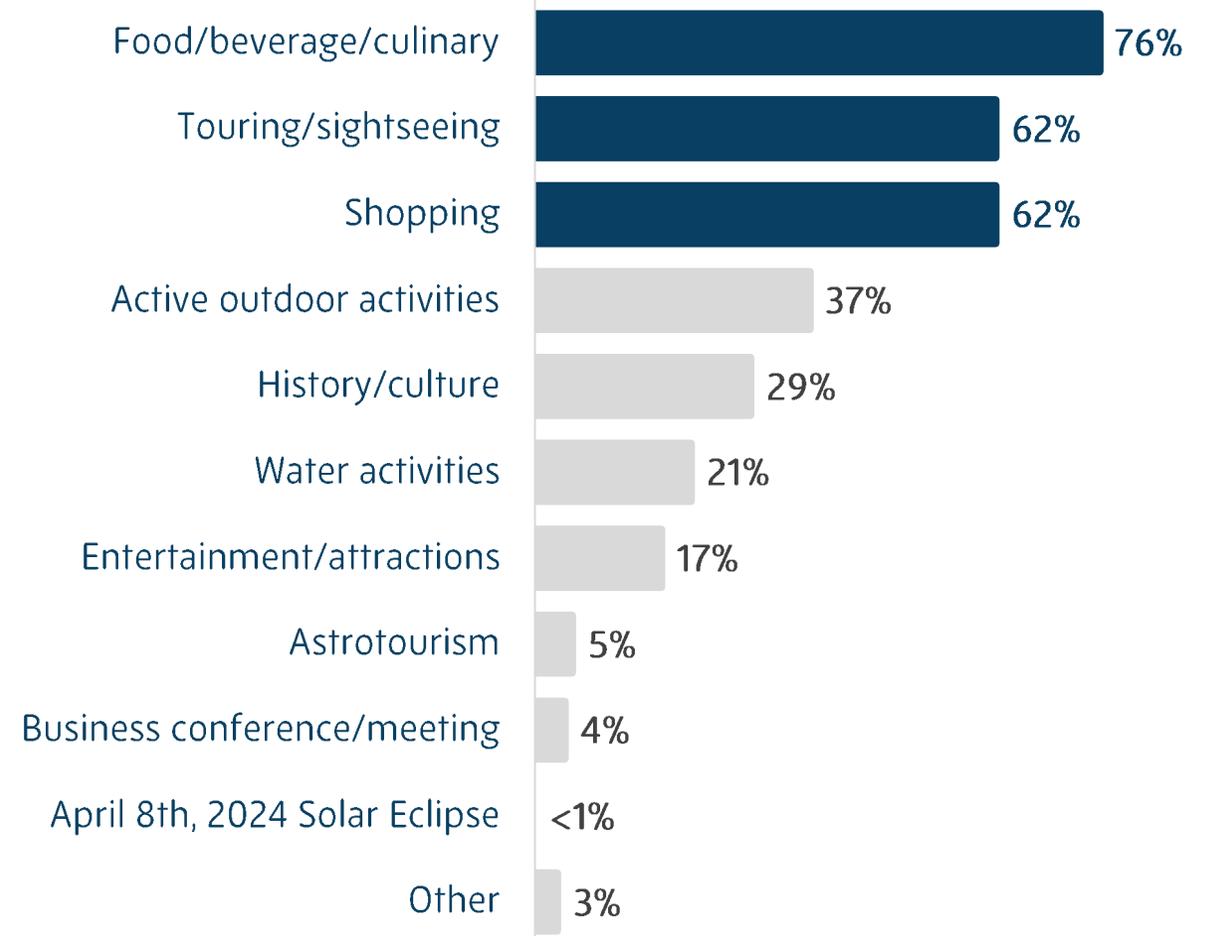
IN-MARKET VISITOR RESOURCES*

- » Visitors were most likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Around **3 in 10** used Visitor Information Centers or materials from their hotel/campground to plan activities
- » Nearly **1 in 6** visitors did not use any resources to plan activities while they were in-market



VISITOR ACTIVITIES*

- » Over **3 in 4** visitors engaged in food/beverage/culinary activities during their trip to Maine
- » Over **3 in 5** visitors enjoyed touring/sightseeing or went shopping during their trip



DETAILED VISITOR ACTIVITIES*

Activity	%	Activity	%	Activity	%
Ate lobster	50%	Enjoyed high-end cuisine or five-star dining	19%	Camping	4%
Enjoying the ocean views/rocky coast	46%	Visited Farmer's Markets	16%	Alpine skiing/snowboarding	4%
Sightseeing	44%	Exploring State and National Parks	16%	Amusement/theme parks	4%
Ate other local seafood	44%	Visit historic sites/museums	16%	Children's museums	4%
Going to local brew pubs/craft breweries	42%	Going to the beach	15%	Bicycling touring	3%
Shopping in downtown areas	37%	Visit art museums/local artisan studios	14%	Nordic skiing	3%
Driving for pleasure	36%	Viewing fall colors	13%	Painting/drawing/sketching	3%
Outlet shopping	36%	Fishing	13%	Animal parks/zoos	3%
Consumed other locally produced Maine foods	29%	Ate farm-to-table or organic cuisine	12%	Outdoor fun centers	3%
Shopping for gifts/souvenirs	29%	Outdoor swimming	12%	Agricultural fairs	3%
Photography	27%	Canoeing/kayaking	11%	Attend sporting events	3%
Wildlife viewing/bird watching	27%	Pool swimming	9%	Bars/nightlife	3%
Nature cruises or tours	26%	Get to know the local people and/or culture	9%	Riding all-terrain vehicles	2%
Shopping for "Made in Maine" products	26%	Shopping at malls	9%	Mountain/Fat Biking	2%
Shopping for unique/locally produced goods	25%	Attend popular music concerts/events	8%	Attend operas/classical music events	2%
Tours of communities/local architecture	24%	Surfing	7%	Water parks	2%
Hiking/climbing/backpacking	24%	Attend plays/musicals/theatrical events	6%	White water rafting	1%
Shopping for antiques/local arts and crafts	22%	Motor boating	6%	Water skiing/jet skiing	1%
Enjoying the mountain views	20%	Snowshoeing	5%	Hunting	1%
Enjoyed unique Maine food or beverages	20%	Snowmobiling	5%	Horseback riding	1%
Enjoying local food at fairs/festivals	19%	Sailing	4%	Summer camps	<1%

*Multiple responses permitted.

DAILY TRAVEL PARTY SPENDING

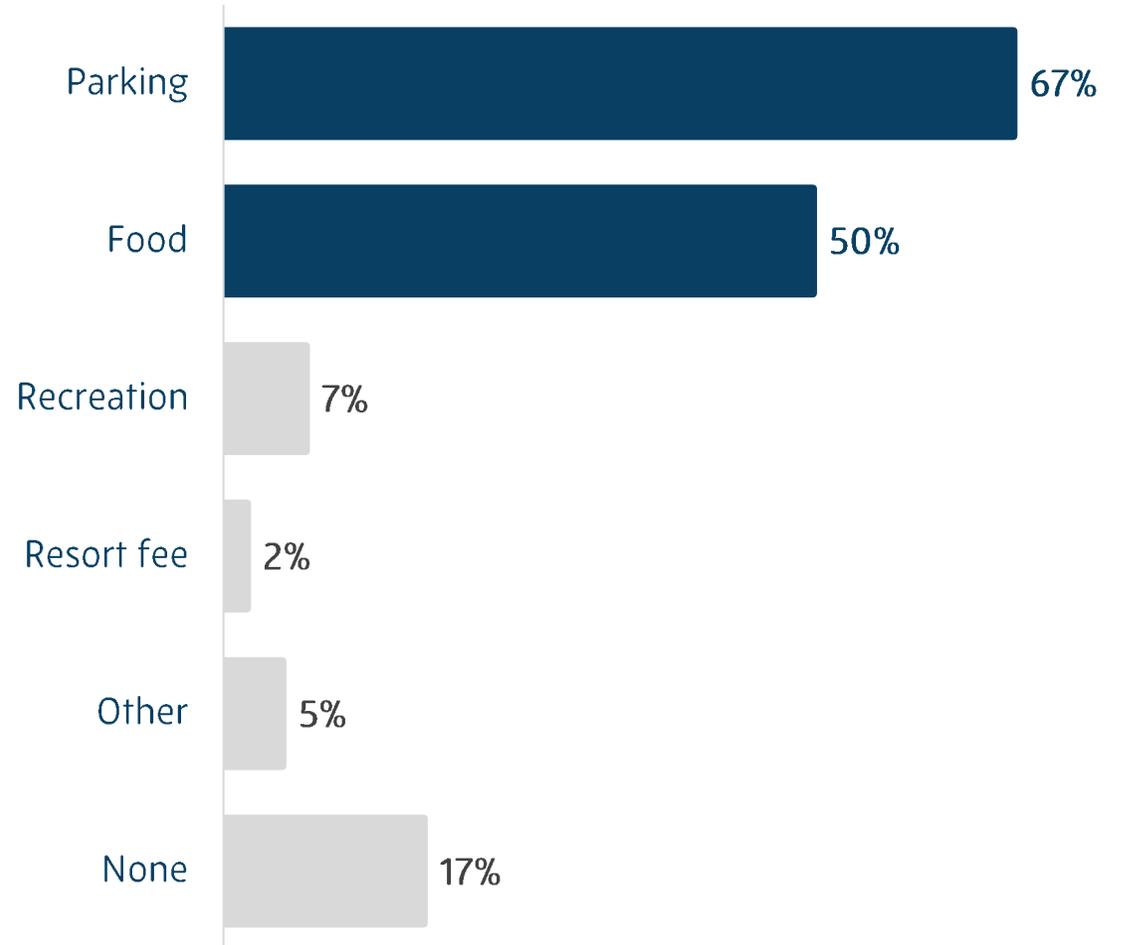
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$297	\$0	\$0
Transportation	\$58	\$44	\$44
Groceries	\$37	\$44	\$18
Restaurants	\$145	\$115	\$58
Shopping	\$121	\$98	\$79
Activities & Attractions	\$83	\$59	\$30
Other	\$14	\$11	\$8
Daily Spending	\$755	\$371	\$237

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,337	\$0	\$0
Transportation	\$261	\$308	\$44
Groceries	\$167	\$308	\$18
Restaurants	\$653	\$805	\$58
Shopping	\$545	\$686	\$79
Activities & Attractions	\$374	\$413	\$30
Other	\$63	\$77	\$8
Total Spending	\$3,398	\$2,597	\$237

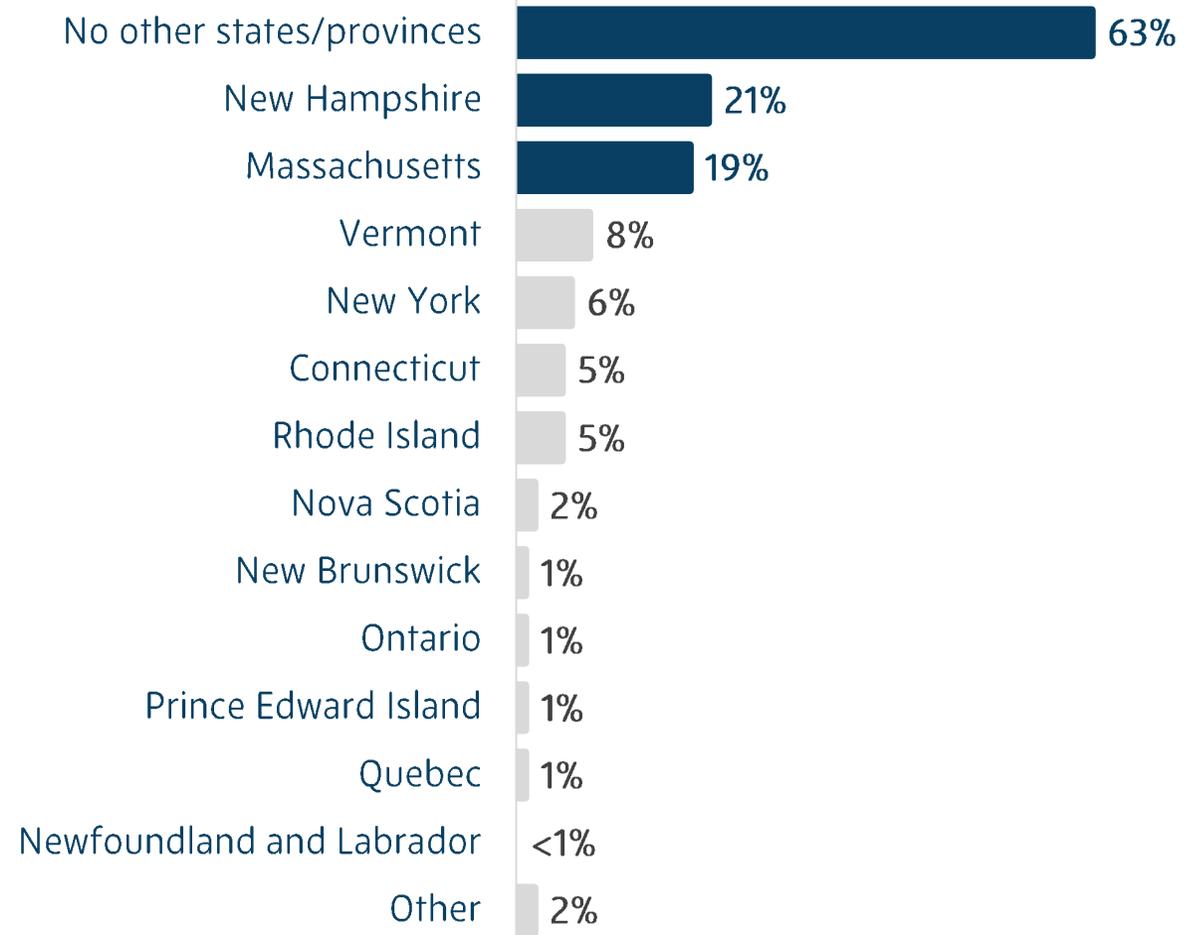
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for over **4 in 5** visitors
- » Price for accommodations included parking for over **2 in 3** visitors
- » Food was included in accommodations' pricing for **half** of visitors



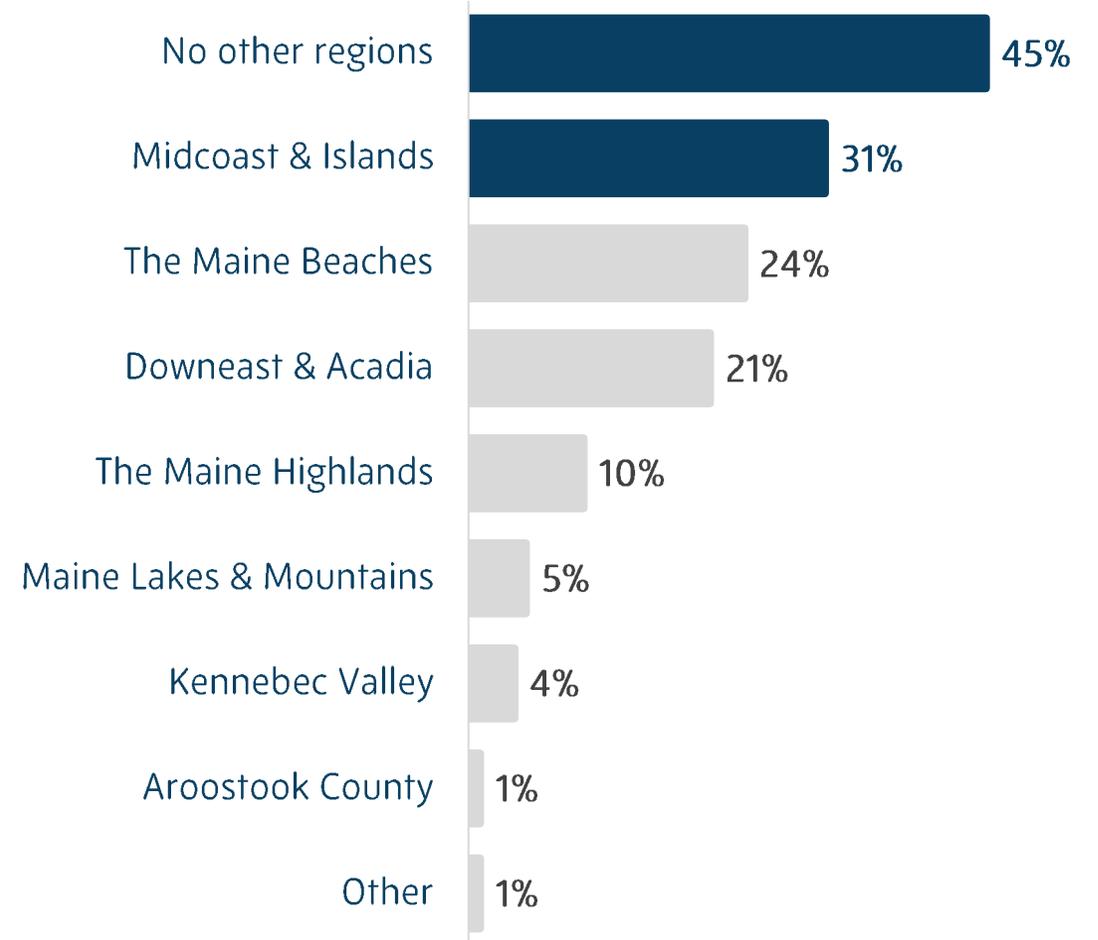
OTHER STATES & PROVINCES VISITED*

- » Nearly **3 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » About **1 in 5** visitors visited New Hampshire or Massachusetts during their trip
- » Like last year, 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 **half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+15% points from 2023)
- » Over **3 in 10** visitors visited Maine's Midcoast and Islands in addition to their primary destination within the state (-13% points from 2023)



VISITOR JOURNEY : POST-TRIP EVALUATION

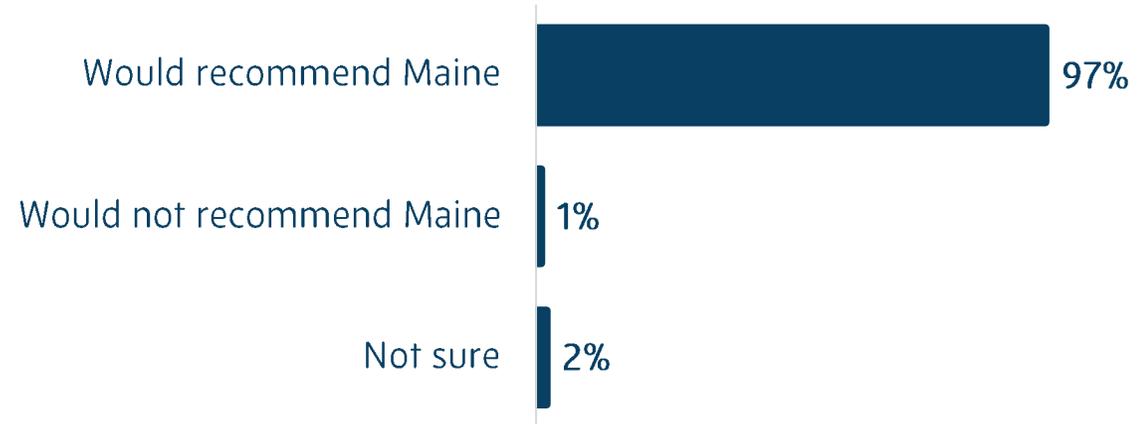


RECOMMENDING MAINE & ITS REGIONS

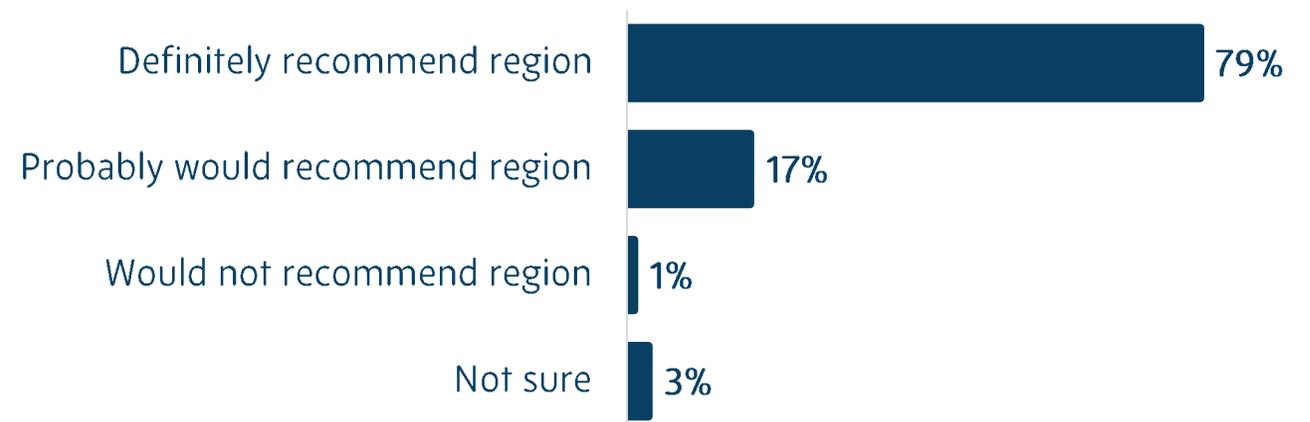
» **97%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation

» **96%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **79%** would definitely recommend (+9% points from 2023)

Likelihood of Recommending Maine

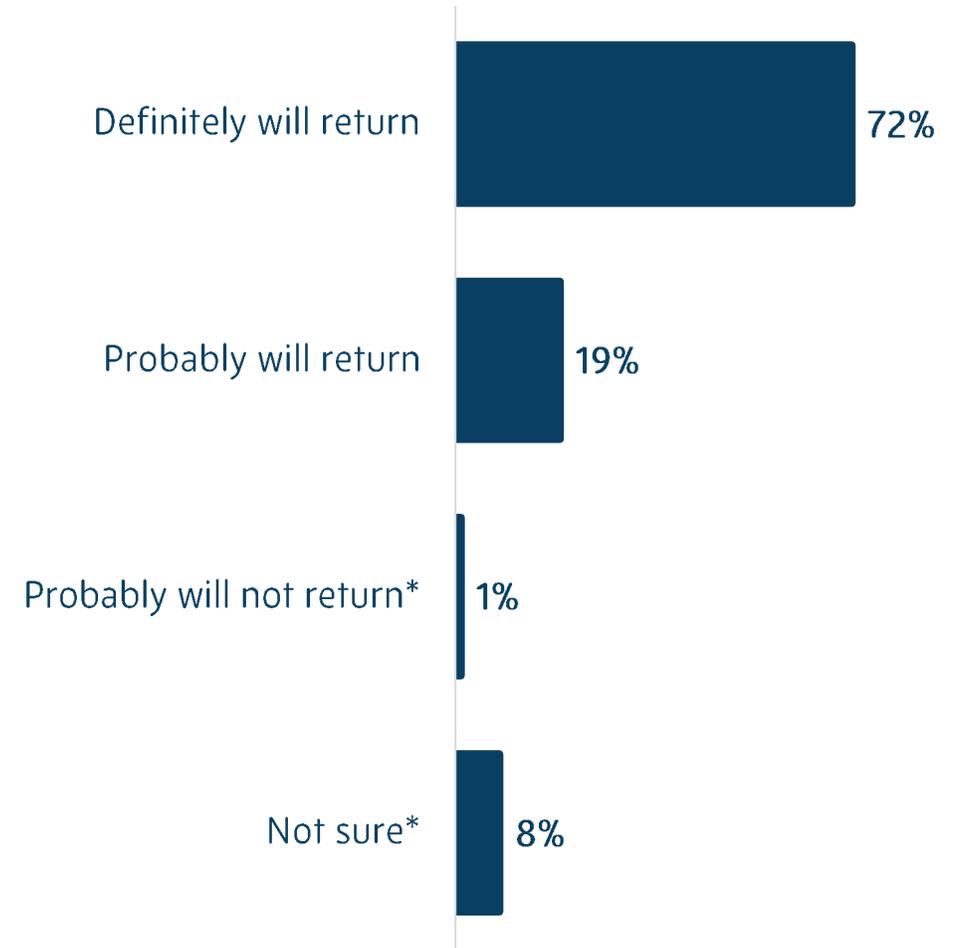


Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

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

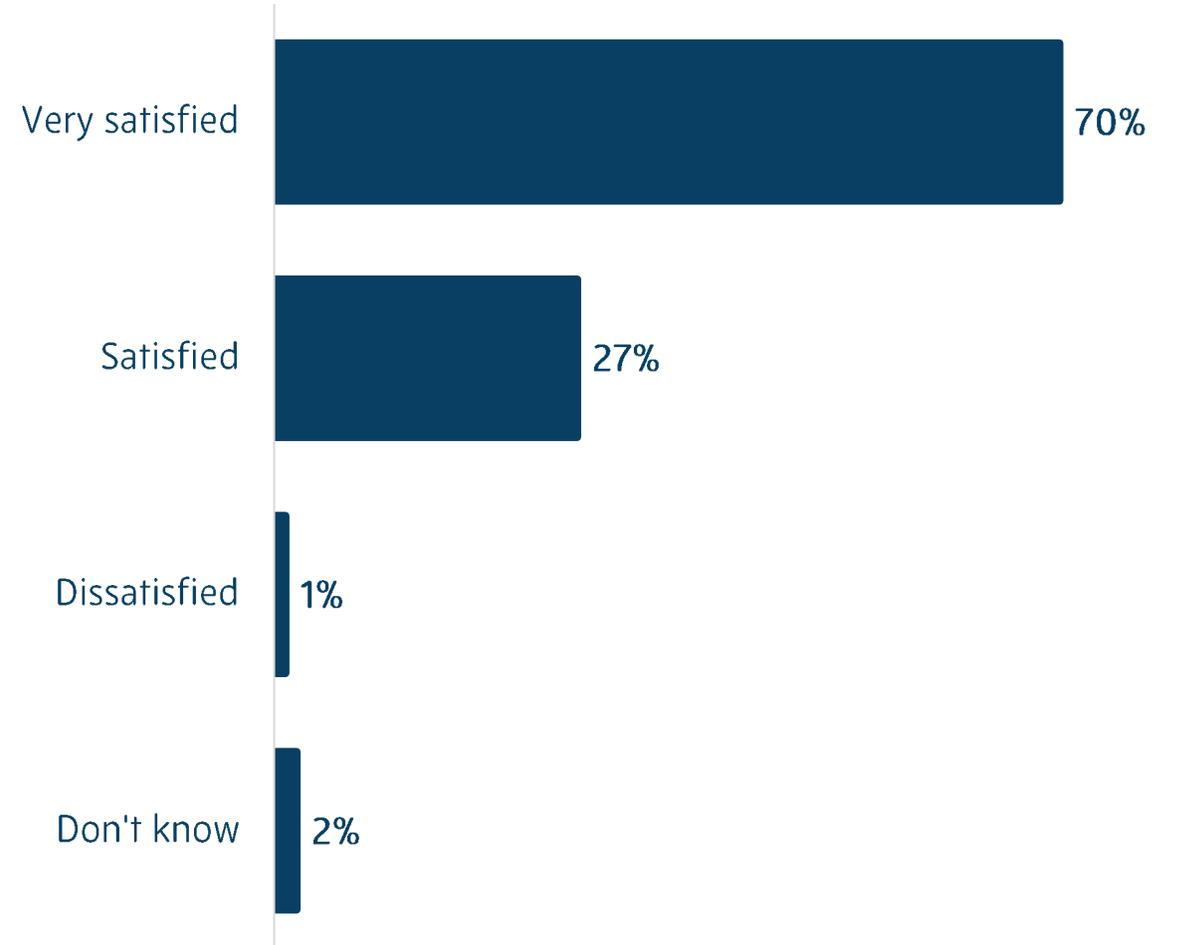


*9% of all visitors are not sure they'll return to Maine for the following reasons:

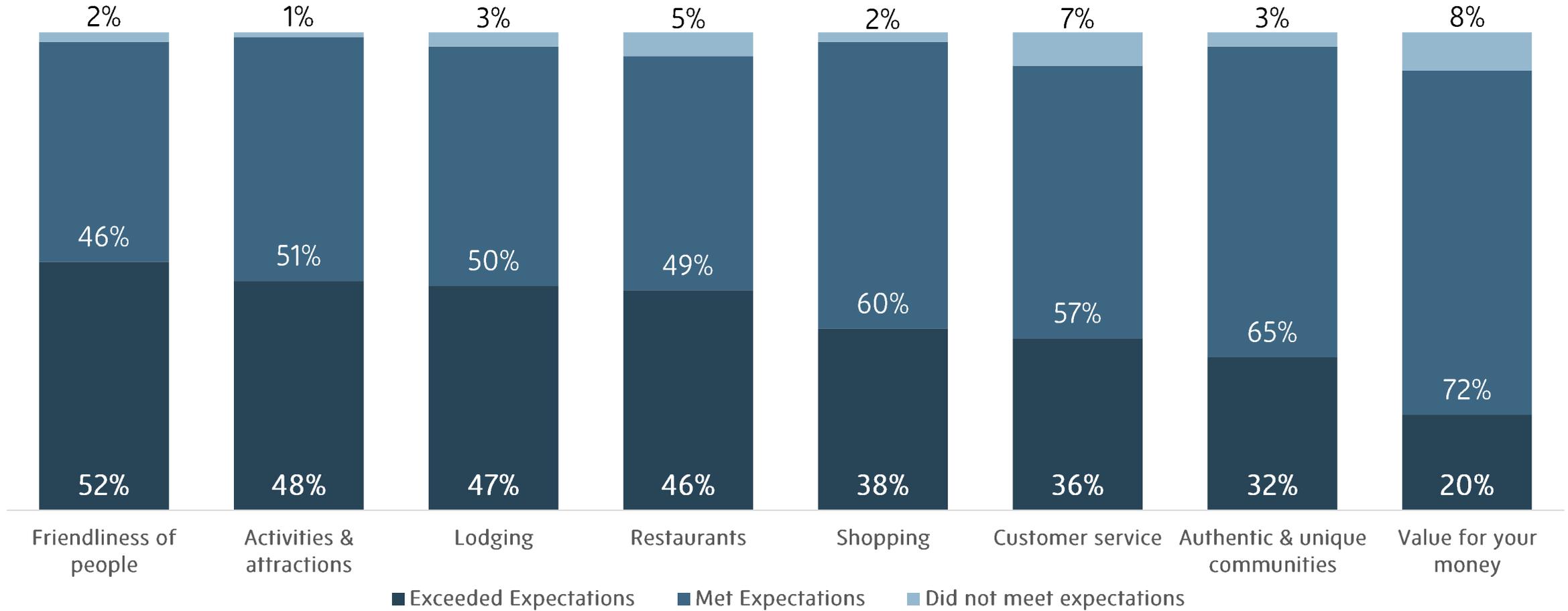
1. Prefer a variety of destinations
2. Traffic/difficult drive
3. Once is enough to see and do everything
4. Too expensive for what you get.

SATISFACTION

- » 97% of visitors were satisfied with their trip to Maine
- » 7 in 10 visitors were very satisfied with their trip to Maine (+9% points from 2023)

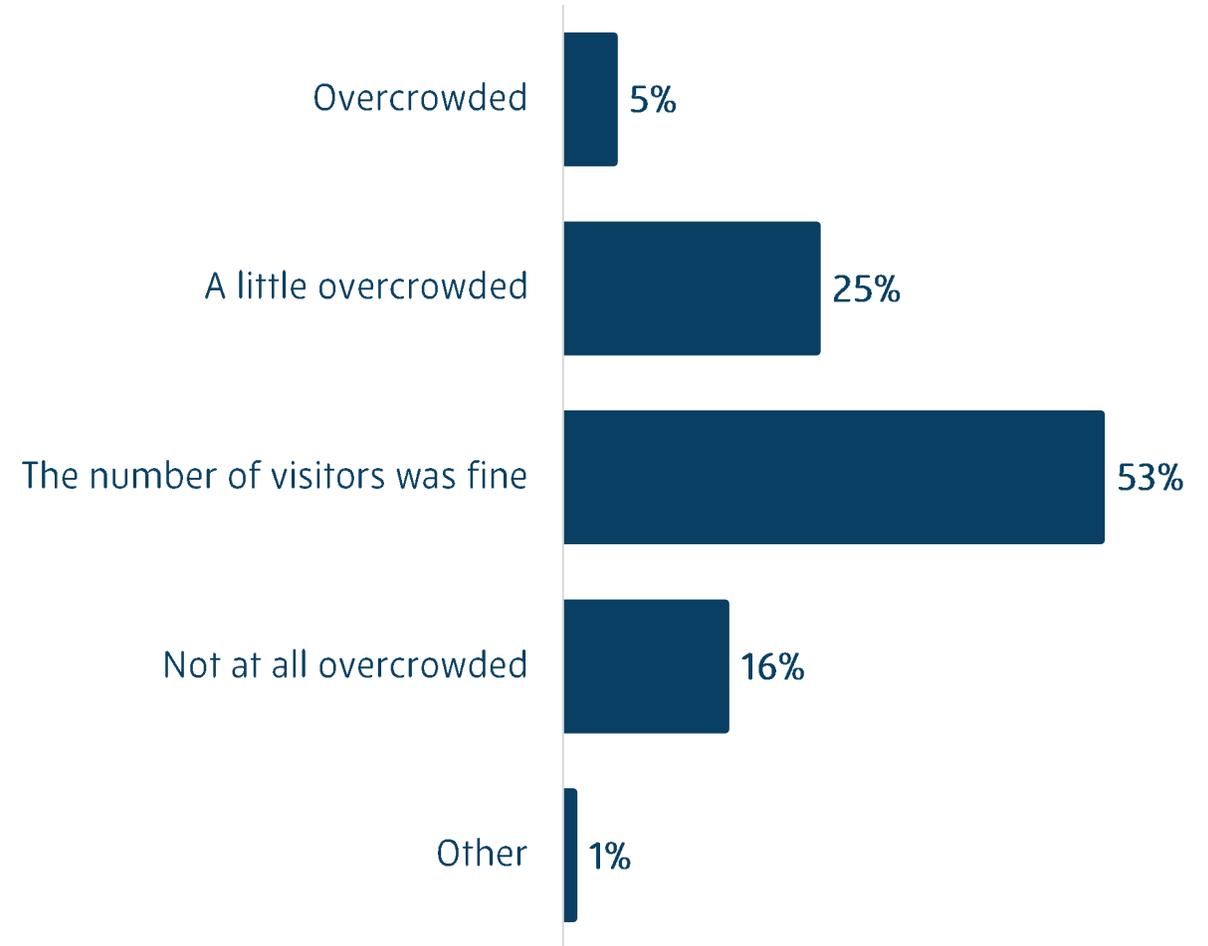


TRIP RATINGS



OVERCROWDING

- » Over **half** of visitors thought the number of visitors during their trip to Maine was fine (+4% points from 2023)
- » **1 in 4** visitors thought Maine was a little overcrowded (-5% points from 2023)



ANNUAL COMPARISONS



VISITOR JOURNEY : PRE-VISIT



TRIP PLANNING CYCLE

Trip Planning Cycle	2023	2024
A week or less	10%	13%
2 - 3 weeks	12%	13%
1 - 2 months	29%	34%
3 - 4 months	25%	21%
5 - 6 months	13%	10%
7 months - 1 year	8%	7%
More than 1 year	3%	2%
Days in Planning Cycle	59	51

Booking Window	2023	2024
A week or less	14%	18%
2 - 3 weeks	16%	16%
1 - 2 months	28%	34%
3 - 4 months	23%	18%
5 - 6 months	11%	7%
7 months - 1 year	6%	5%
More than 1 year	2%	2%
Days in Booking Window	51	44

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2023	2024
VisitMaine.com	18%	28%
Online search engines	34%	25%
VisitPortland.com	14%	25%
Online travel agency	17%	21%
Hotel websites	18%	16%
TripAdvisor	15%	11%
Airbnb	12%	9%
Facebook	13%	9%
Instagram	10%	9%
DowneastAcadia.com	7%	9%
TheMaineBeaches.com	7%	9%
Vrbo	11%	8%
Traveler reviews/blogs/stories	13%	8%
MainesMidCoast.com	3%	7%
YouTube	7%	6%
Airline websites	6%	5%
Visit Maine social media	8%	5%
MaineTourism.com	4%	5%
VisitBarHarbor.com	2%	4%
Vacation rental websites	4%	3%
TheMaineHighlands.com	0%	2%
MaineLakesandMountains.com	0%	2%
DiscoverNewEngland.com	1%	1%
VisitAroostook.com	1%	1%
X (Formerly Twitter)	1%	1%
KennebecValley.org	1%	<1%
Other	6%	5%
None	16%	22%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2023	2024
Advice from friends/family	38%	32%
Travel guides/brochures	17%	25%
Called the Maine Office of Tourism	9%	15%
Articles or travelogues	21%	14%
Visit Maine e-newsletter	6%	12%
Travel books & magazines	9%	11%
AAA	11%	8%
Travel planning apps	7%	6%
Visitor Guide	5%	5%
Called local Chambers of Commerce	2%	2%
Called local convention and visitors bureaus	1%	1%
Called another Maine Tourism/Lodging Association	1%	1%
Travel agent	1%	1%
Other	3%	2%
None	28%	30%

REASON FOR VISITING*

Reasons for Visiting	2023	2024
Sightseeing/touring	32%	35%
Relax and unwind	27%	28%
Visiting friends/relatives	27%	21%
Shopping	16%	19%
Nature & bird watching	17%	18%
Beach	7%	9%
Special occasion	11%	9%
Culture/museums/history	8%	8%
Attractions	8%	6%
Special event	9%	5%
Conference/meeting	5%	5%
Active outdoor activities	5%	4%
Water activities	4%	4%
Snow activities	1%	2%
Sporting event	1%	1%
Astrotourism	<1%	<1%
April 8 th , 2042 Solar Eclipse	NA	<1%
Other	10%	15%

*Multiple responses permitted.

TV SHOWS & FILM

Trip Inspiration From Film	2023	2024
Yes	5%	5%
No	94%	93%
Don't know	1%	2%

How Film Inspired Trip*	2023	2024
Seeing Maine in a film or TV show made me think about Maine as a place to visit	46%	42%
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	29%	34%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	13%	12%
Visiting a location related to a TV show or film was the main reason I visited Maine	4%	3%
Something else	8%	9%

Visited TV or Film Attractions**	2023	2024
Yes	4%	4%
No	93%	86%
Don't know	3%	10%

*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	2023	2024
No other states/provinces	54%	63%
New Hampshire	23%	20%
Massachusetts	22%	16%
Vermont	10%	11%
New York	6%	7%
Rhode Island	8%	6%
Connecticut	6%	5%
New Brunswick	2%	2%
Nova Scotia	3%	2%
Newfoundland and Labrador	1%	1%
Ontario	1%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
Other	2%	2%

ADVERTISING/PROMOTIONS

Recalled Advertising	2023	2024
Yes	47%	40%
No	41%	43%
Not sure	12%	17%

Influenced by Advertising	2023	2024
Yes	30%	17%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recall*	2023	2024
Social media	52%	54%
Internet	39%	29%
Magazine	27%	20%
Radio	7%	19%
Cable or satellite television	13%	11%
VisitMaine.com	11%	8%
Traveler reviews/blogs	12%	7%
AAA	11%	7%
Maine travel/visitor guide	8%	6%
Newspaper	6%	5%
Online streaming service	4%	4%
Brochure	4%	3%
Billboard	2%	2%
Deal – based promotion	1%	1%
Music/podcast streaming	2%	1%
Other	5%	8%
Not sure	1%	2%

VISITOR JOURNEY : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2023	2024
Maine	9%	8%
New England	31%	33%
Mid-Atlantic	24%	22%
Southeast	13%	12%
Southwest	4%	3%
Midwest	10%	10%
West	4%	4%
Canada	3%	5%
International	2%	3%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2023	2024
Massachusetts	15%	16%
New York	10%	9%
Maine	9%	8%
Connecticut	5%	6%
New Hampshire	6%	6%
Florida	6%	5%
Pennsylvania	5%	5%
New Jersey	5%	4%
Quebec	2%	3%
California	2%	2%
Georgia	2%	2%
Ohio	2%	2%
Rhode Island	2%	2%
Texas	2%	2%
Vermont	1%	2%
Virginia	3%	2%

ORIGIN MARKET

Origin Markets	2023	2024
Boston	9%	8%
New York City ¹	10%	8%
Washington DC - Baltimore ²	3%	3%
Providence, RI	2%	2%
Philadelphia	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	2023	2024
As a couple	47%	45%
As a family	26%	28%
Traveled alone	13%	13%
With other couples/friends	10%	10%
With business associates	2%	2%
In a tour group	2%	1%
Other	<1%	1%
Average Travel Party Size	2.6	2.7

TRAVEL WITH CHILDREN*

Children in Travel Party*	2023	2024
No children	86%	84%
Children younger than 6	5%	5%
Children 6 – 12	7%	9%
Children 13 – 17	7%	7%

Gender	2023	2024
Male	41%	47%
Female	59%	53%

DEMOGRAPHIC PROFILE

Age	2023	2024
Under 25	4%	4%
25 – 34	12%	14%
35 – 44	23%	24%
45 – 54	19%	18%
55 – 65	26%	24%
Over 65	16%	16%
Median Age	51	49

Race/Ethnicity	2023	2024
White	85%	83%
Hispanic	3%	6%
Asian	6%	5%
Black	4%	4%
Indigenous	<1%	<1%
Other	2%	2%

LIFESTYLE PROFILE

Marital Status	2023	2024
Single/widowed	21%	21%
Married/living with partner	79%	79%

Employment Status	2023	2024
Employed full-time	55%	61%
Employed part-time	11%	8%
Contract/freelance/temporary employee	6%	4%
Retired	18%	20%
Not currently employed	7%	5%
Student	3%	2%

LIFESTYLE PROFILE

Household Income	2023	2024
Less than \$25,000	3%	3%
\$25,000 - \$49,999	8%	7%
\$50,000 - \$74,999	17%	15%
\$75,000 - \$99,999	22%	20%
\$100,000 - \$149,999	25%	24%
\$150,000 - \$199,999	13%	19%
\$200,000 - \$249,999	7%	7%
\$250,000 or more	5%	5%
Median Household Income	\$100,000	\$110,400

LIFESTYLE PROFILE

Educational Attainment	2023	2024
High school or less	5%	6%
Some college or technical school	11%	12%
College or technical school graduate	60%	57%
Graduate school	24%	25%

NEW & RETURNING VISITORS

Previous Trips to Maine	2023	2024
This is my first time	25%	25%
2 - 5 times	31%	27%
6 - 10 times	20%	18%
11+ times	24%	30%

VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2023	2024
Drove to Maine	70%	72%
Flew into Portland Intl Jetport	13%	13%
Flew into Boston Logan Intl	8%	8%
Took a motor coach tour or bus	3%	2%
Flew into Bangor Intl Airport	1%	1%
Flew into another airport	1%	1%
Traveled by train	1%	1%
Other	2%	2%

LENGTH OF STAY

Nights Stayed	2023	2024
Not staying overnight	19%	18%
1 night	5%	6%
2 nights	13%	14%
3 nights	18%	17%
4 nights	14%	14%
5+ nights	31%	31%
Average Length of Stay	4.7	4.5

ACCOMMODATIONS

Accommodations	2023	2024
Hotel/motel/resort	33%	37%
Friends/family home	21%	20%
Not spending the night	19%	18%
Vacation rental home	12%	10%
Personal second home	5%	5%
Bed & Breakfast/Inn	5%	4%
Campground/RV Park	2%	3%
Wilderness camping	1%	1%
Sporting camp/wilderness lodge	1%	1%
Outdoor Outfitter	<1%	<1%
Other	1%	1%

BOOKING

Booking Methods	2023	2024
Directly with the hotel/condo	36%	36%
Online travel agency	28%	33%
Airbnb	12%	11%
Short term rental service	11%	9%
Vacation rental company	2%	2%
Offline travel agent	1%	1%
Group tour operator	2%	1%
Travel package provider	1%	1%
Other	7%	6%

IN-MARKET RESOURCES*

In-Market Resources	2023	2024
Navigation website/apps	58%	55%
Visitor Information Centers	25%	30%
Materials from hotel/campground	26%	28%
VisitMaine.com	18%	26%
Hotel/resort website/app	20%	25%
Trip planning app	20%	24%
Restaurant website/app	37%	24%
Destination social media	16%	20%
Personal social media	24%	15%
Booking website/app	5%	5%
Airline website/app	4%	3%
Chambers of Commerce	4%	3%
Other	8%	14%
None	14%	15%

ACTIVITIES*

Activities	2023	2024
Food/beverage/culinary	76%	76%
Touring/sightseeing	57%	62%
Shopping	57%	62%
Active outdoor activities	33%	37%
History/culture	29%	29%
Water activities	21%	21%
Entertainment/attractions	20%	17%
Astrotourism	2%	5%
Business conference/meeting	4%	4%
April 8 th , 2024 Solar Eclipse	NA	<1%
Other	5%	3%

DETAILED VISITOR ACTIVITIES*

Activity	%	Activity	%	Activity	%
Ate lobster	50%	Enjoyed high-end cuisine or five-star dining	19%	Camping	4%
Enjoying the ocean views/rocky coast	46%	Visited Farmer's Markets	16%	Alpine skiing/snowboarding	4%
Sightseeing	44%	Exploring State and National Parks	16%	Amusement/theme parks	4%
Ate other local seafood	44%	Visit historic sites/museums	16%	Children's museums	4%
Going to local brew pubs/craft breweries	42%	Going to the beach	15%	Bicycling touring	3%
Shopping in downtown areas	37%	Visit art museums/local artisan studios	14%	Nordic skiing	3%
Driving for pleasure	36%	Viewing fall colors	13%	Painting/drawing/sketching	3%
Outlet shopping	36%	Fishing	13%	Animal parks/zoos	3%
Consumed other locally produced Maine foods	29%	Ate farm-to-table or organic cuisine	12%	Outdoor fun centers	3%
Shopping for gifts/souvenirs	29%	Outdoor swimming	12%	Agricultural fairs	3%
Photography	27%	Canoeing/kayaking	11%	Attend sporting events	3%
Wildlife viewing/bird watching	27%	Pool swimming	9%	Bars/nightlife	3%
Nature cruises or tours	26%	Get to know the local people and/or culture	9%	Riding all-terrain vehicles	2%
Shopping for "Made in Maine" products	26%	Shopping at malls	9%	Mountain/Fat Biking	2%
Shopping for unique/locally produced goods	25%	Attend popular music concerts/events	8%	Attend operas/classical music events	2%
Tours of communities/local architecture	24%	Surfing	7%	Water parks	2%
Hiking/climbing/backpacking	24%	Attend plays/musicals/theatrical events	6%	White water rafting	1%
Shopping for antiques/local arts and crafts	22%	Motor boating	6%	Water skiing/jet skiing	1%
Enjoying the mountain views	20%	Snowshoeing	5%	Hunting	1%
Enjoyed unique Maine food or beverages	20%	Snowmobiling	5%	Horseback riding	1%
Enjoying local food at fairs/festivals	19%	Sailing	4%	Summer camps	<1%

*Multiple responses permitted.

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2023	2024
No other states/provinces	56%	63%
New Hampshire	24%	21%
Massachusetts	22%	19%
Vermont	7%	8%
New York	6%	6%
Connecticut	6%	5%
Rhode Island	6%	5%
Nova Scotia	2%	2%
New Brunswick	1%	1%
Ontario	<1%	1%
Prince Edward Island	<1%	1%
Quebec	1%	1%
Newfoundland and Labrador	<1%	<1%
Other	1%	2%

TRAVELING IN MAINE*

Maine Regions Visited	2023	2024
No other regions	30%	45%
Midcoast & Islands	44%	31%
The Maine Beaches	33%	24%
Downeast & Acadia	25%	21%
The Maine Highlands	7%	10%
Maine Lakes & Mountains	4%	5%
Kennebec Valley	6%	4%
Aroostook County	1%	1%
Other	1%	1%

VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2023	2024
Would recommend Maine	98%	97%
Would not recommend Maine	<1%	1%
Not sure	2%	2%

Recommending Regions	2023	2024
Definitely recommend region	70%	79%
Probably would recommend region	27%	17%
Would not recommend region	<1%	1%
Not sure	3%	3%

RETURNING TO MAINE

Returning to Maine	2023	2024
Definitely will return	68%	72%
Probably will return	23%	19%
Probably will not return	<1%	1%
Not sure	9%	8%

SATISFACTION

Satisfaction	2023	2024
Very satisfied	61%	70%
Satisfied	37%	27%
Dissatisfied	<1%	1%
Don't know	2%	2%

TRIP EXPECTATIONS

Exceeded Expectations	2023	2024
Friendliness of people	43%	52%
Activities & attractions	51%	48%
Lodging	44%	47%
Restaurants	36%	46%
Shopping	27%	38%
Customer service	31%	36%
Authentic & unique communities	33%	32%
Value for your money	24%	20%

OVERCROWDING

Overcrowding	2023	2024
Overcrowded	5%	5%
A little overcrowded	30%	25%
The number of visitors was fine	49%	53%
Not at all overcrowded	14%	16%
Other	2%	1%

STUDY METHODS



METHODOLOGY



Visitor Tracking

647 interviews were completed with visitors to Greater Portland & Casco Bay online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2023 and November 30th, 2024.

Economic Impact

Total economic impact of tourism on Greater Portland & Casco Bay is a function of direct spending by visitors to Greater Portland & Casco Bay, 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 Greater Portland & Casco Bay. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Greater Portland & Casco Bay's multiplier is 1.66.

GREATER PORTLAND & CASCO BAY

2024 Economic Impact & Visitor Tracking Report
DECEMBER 2023 – NOVEMBER 2024

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

