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.

Pre-Visit	Traveler Profile	Trip Experience	Post-Trip Evaluation	Impact of Tourism
o Planning cycle o Planning sources o Reasons for visiting o Other considered destinations o Exposure to advertising o Advertising sources	o Visitor origin o Travel party composition o Visitor demographics o Previous visits	o Visitor transportation o Nights stayed o Accommodations o Booking methods o Trip resources o Visitor activities o Expectations vs. experience o Visitor spending o Included amenities o Other areas visited	o Uniqueness of Maine o Highlight of trip o Recommending Maine o Satisfaction with trip o Likelihood of returning o Perceptions of Maine	o Visitor direct spending o Number of visitors o Room nights generated o Occupancy rate o Average daily room rates o Revenue per available room

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EXECUTIVE SUMMARY

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

» Consult airline websites while planning their trip to Maine

» Consider only Maine as a destination option

» Travel from more distant parts of the country rather than from the northeast

» Come to Maine primarily to visit friends/family or for business

» Report that they did not recall seeing advertising for Maine before their trip

» Travel alone

» Be very satisfied with their trip

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VISITOR JOURNEY: IMPACT OF TOURISM

Pre-Visit

Traveler Profile

Trip Experience

Post-Trip Evaluation

Impact of Tourism

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ECONOMIC IMPACT

Visitor spending generated

$1,120,941,300

in economic impact to Maine Highlands' economy,
up 5.8% from 2023

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DIRECT SPENDING

Visitors to Maine Highlands spent

$708,090,100

throughout the area in 2024 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **8.1%** from 2023

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Maine Highlands attracted

921,700

visitors in 2024, down **9.9%** from 2023

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

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VISITORS DAYS*

All visitors to Maine Highlands spent

5,601,000

days in Maine Highlands throughout 2024, down **10.1%** 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.

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Visitors to Maine Highlands generated

985,600

nights in Maine Highlands accommodations throughout 2024, down **6.7%** from 2023

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JOBS SUPPORTED

Visitors to Maine Highlands supported

8,800

jobs throughout the area in 2024, up **6.0%** from 2023*

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

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WAGES GENERATED

Visitors to Maine Highlands supported

$353,663,000

in wages paid to Maine Highlands employees in 2024, up **8.8%** from 2023*

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

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VISITORS & JOBS

Every

105

visitors supports a new job in Maine Highlands

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HOUSEHOLD SAVINGS

Visitors to Maine Highlands saved local households

$1,469

in state and local taxes in 2024

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LODGING METRICS*

Occupancy Rate

49.1%

- 6.5% from 2023

Average Daily Rate

$150.13

+ 0.8% from 2023

Revenue per Available Room

$73.76

- 5.8% from 2023

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

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VISITOR JOURNEY: PRE-VISIT

Pre-Visit | Traveler Profile | Trip Experience | Post-Trip Evaluation | Impact of Tourism

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TRIP PLANNING CYCLE

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

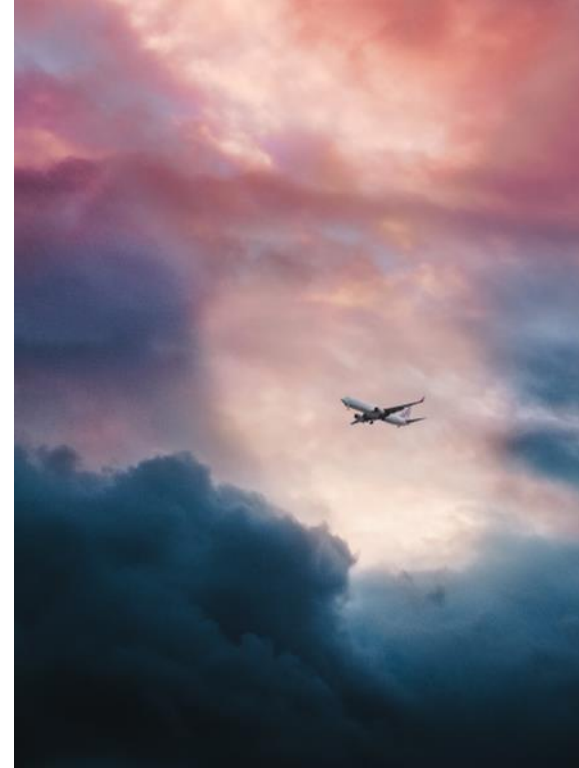» **55%** of visitors have a booking window of less than 3 months

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TOP TRIP PLANNING SOURCES*

29% Advice from family/friends

29% Online search engines

23% Airline websites

21% Online travel agency

*Multiple responses permitted.

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TOP REASONS FOR VISITING*

33% Visit friends/family

32% Relax and unwind

22% Sightseeing/touring

19% Nature/bird watching

*Multiple responses permitted.

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CONSIDERING MAINE AS A DESTINATION

» Nearly **4 in 5** visitors considered visiting **ONLY** Maine while planning their trips (**+2%** points from 2023)

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

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TV SHOWS & FILM

» **3%** of visitors said a TV show or film inspired their trip to Maine

» **27%** of visitors who were inspired by a TV show/film said it made them think about Maine as a place to visit

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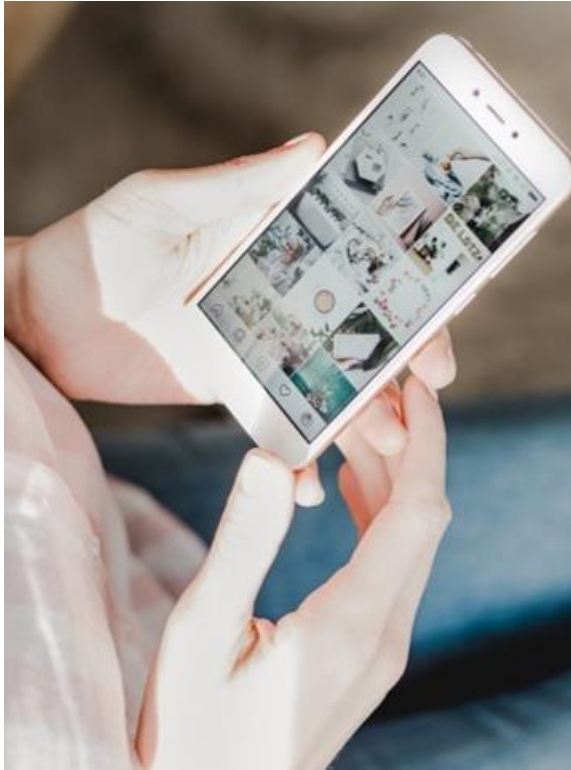R E S E A R C H

PRE-TRIP RECALL OF ADVERTISING

» Over **1 in 4** visitors recalled advertising or promotions for Maine prior to their trip (**-2%** points from 2023)

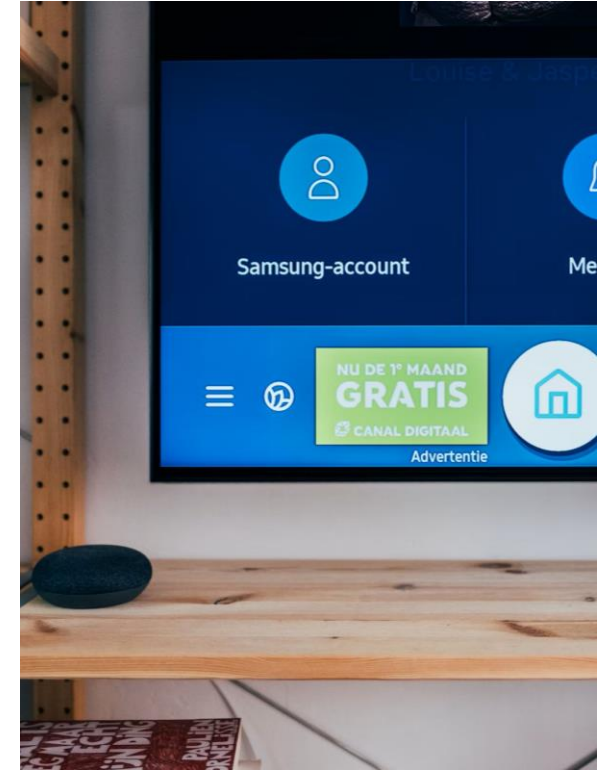» This information influenced **13% of all** visitors to visit Maine (**+1%** point from 2023)

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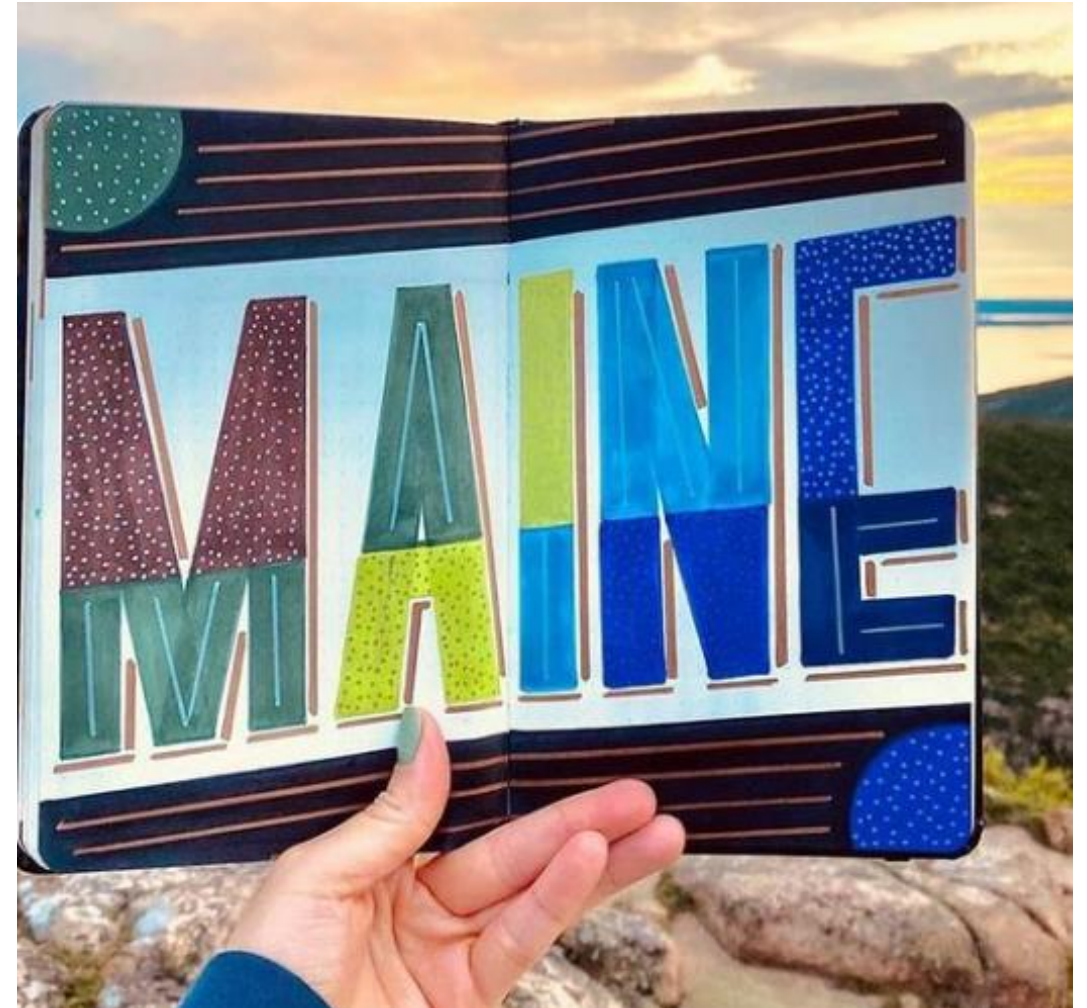
TOP SOURCES OF ADVERTISING RECALL*

33% Internet

30% Social media

20% Magazine

19% Cable or satellite television

*Multiple responses permitted.

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VISITOR JOURNEY: TRAVELER PROFILE

Pre-Visit → **Traveler Profile** → Trip Experience → Post-Trip Evaluation → Impact of Tourism

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REGIONS OF ORIGIN

7%

10%

16%

20%

12%

5%

20%

8%
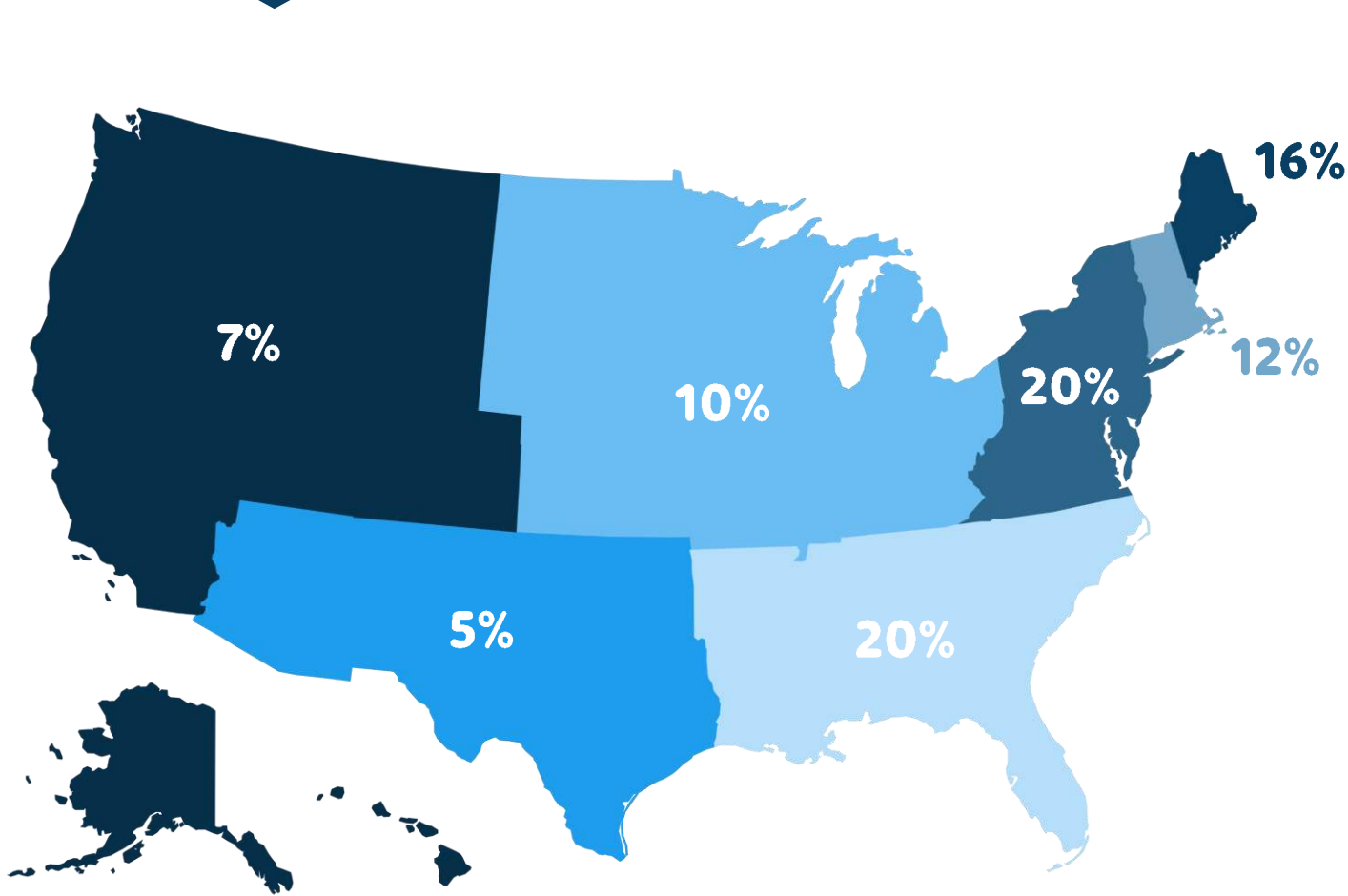
2% of visitors came from outside of the United States and Canada.
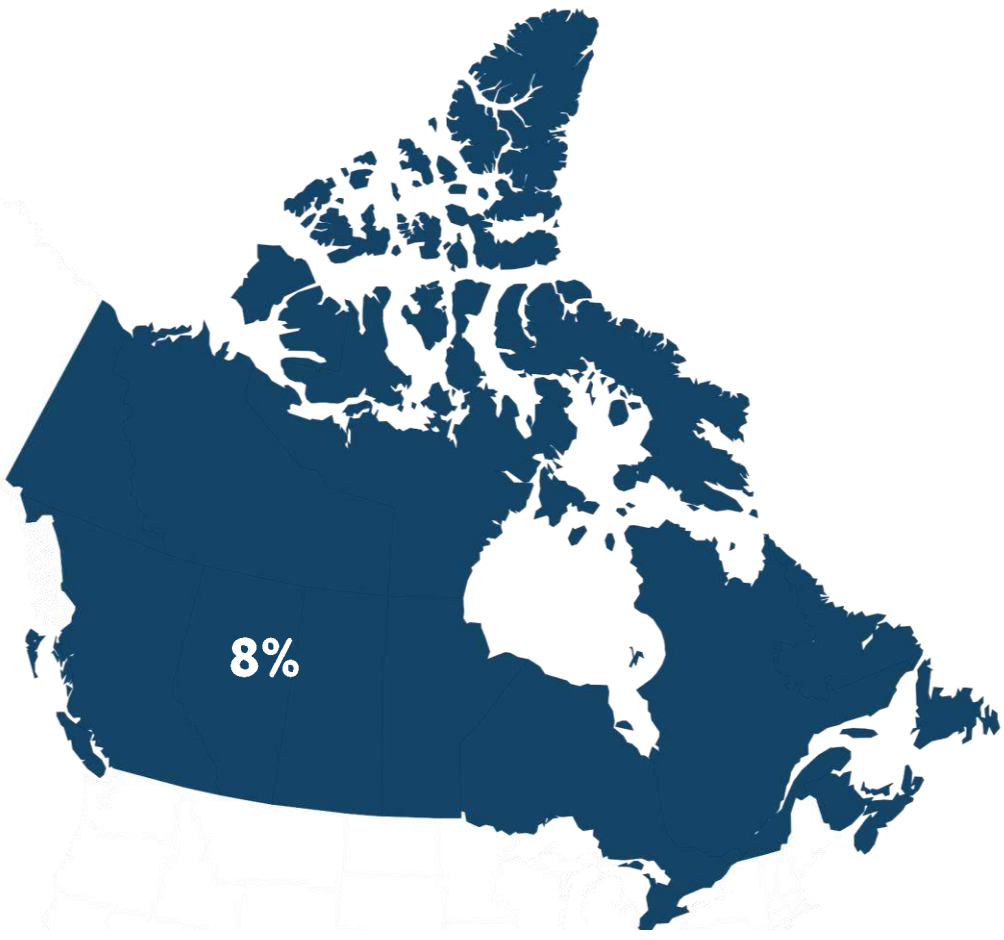
8% of visitors came from Canada.

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TOP ORIGIN STATES & PROVINCES
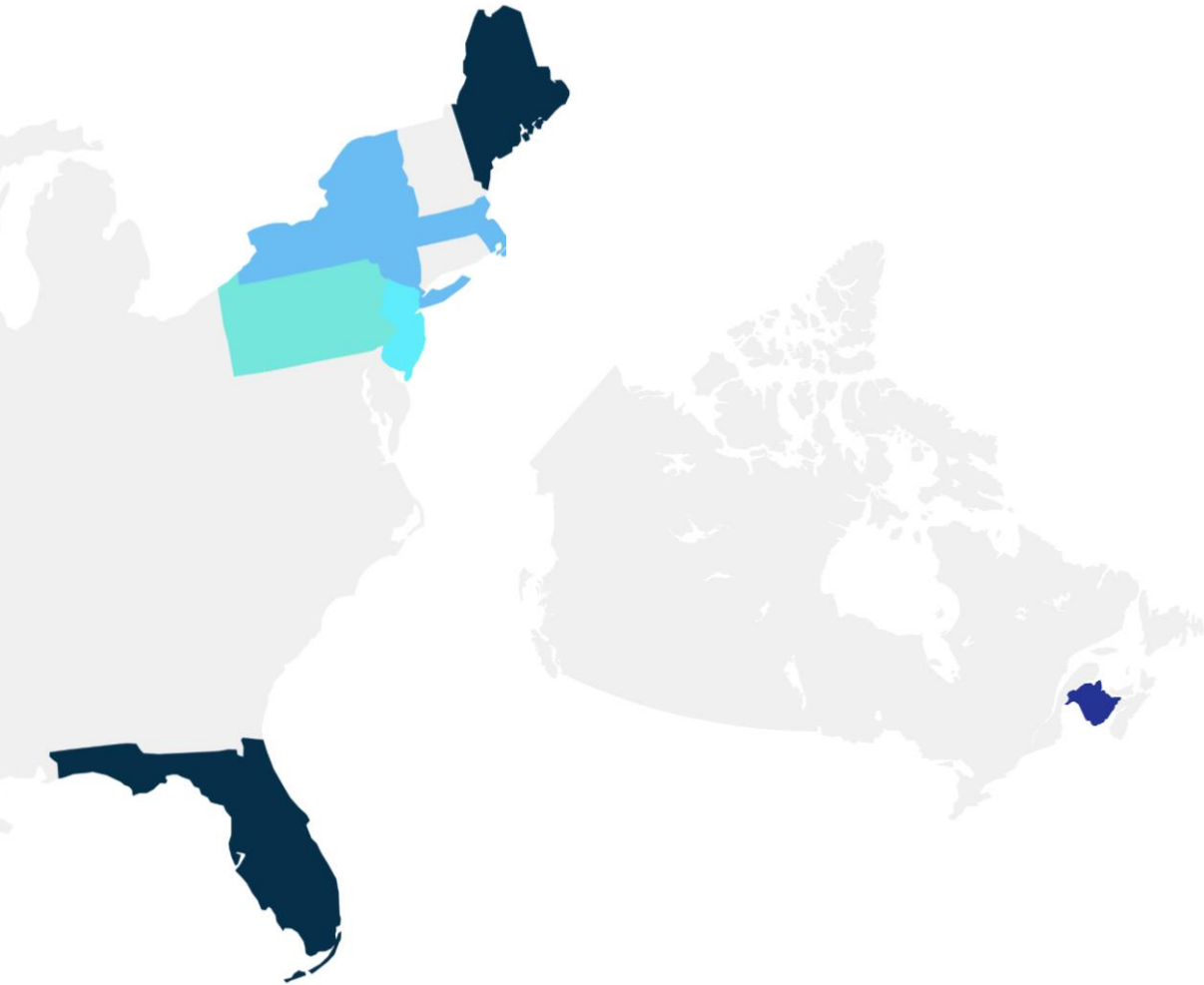
51% of visitors traveled from **7** U.S. states and a Canadian province, including from other regions of Maine.

16 % Maine

11 % Florida

6 % New Brunswick

5 % Massachusetts

5 % New York

4 % New Jersey

4 % Pennsylvania

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TOP ORIGIN MARKETS

6% New York City[1]

5% Washington DC – Baltimore[2]

[1] Includes some markets in New Jersey, Pennsylvania, and Connecticut.
[2] Includes some markets in Maryland, Virginia, and West Virginia.

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TRAVEL PARTIES

The typical Maine visitor traveled with **2.6** people in their visitor party

13% visitors traveled with at least one person under the age of 18 in their travel party

VISITOR PROFILE

» The typical Maine visitor:
  » Is **48** years old[1]
  » Is white – **90%**
  » Is a college graduate – **74%**
  » Is married/in a domestic partnership – **69%**
  » Is employed full-time – **60%**
  » Has an annual household income[2] of **$108,000**

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

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NEW & RETURNING VISITORS

» **23%** 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 (**-4%** points from 2023)

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VISITOR JOURNEY : TRIP EXPERIENCE

Pre-Visit → Traveler Profile → **Trip Experience** → Post-Trip Evaluation → Impact of Tourism

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TRANSPORTATION

» Maine is a drive-market for most visitors, with **79%** choosing to travel by car over plane, motor coach/bus, or train

» Most visitors who flew to Maine arrived at Bangor International Airport

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NIGHTS STAYED

» **87%** 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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TOP ACCOMMODATIONS

30% Hotel/motel/resort

22% Friends/family home

13% Did not stay overnight

12% Personal second home

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TOP IN-MARKET VISITOR RESOURCES*

34% Navigation website/apps

15% Restaurant website/app

11% Personal social media

*Multiple responses permitted.

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TOP VISITOR ACTIVITIES*

66% Food/beverage/ culinary

45% Touring/sightseeing

41% Active outdoor activities

40% Shopping

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» **4 in 5** visitors did not visit any other U.S. state or Canadian province during their trip (**+3%** points from 2023)

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TRAVELING WITHIN MAINE

» Over **1 in 3** visitors visited DownEast & Acadia in addition to their primary destination 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 (**+2%** points from 2023)

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VISITOR JOURNEY : POST-TRIP EVALUATION

Pre-Visit → Traveler Profile → Trip Experience → **Post-Trip Evaluation** → Impact of Tourism

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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

» **91%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **74%** would definitely recommend

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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

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SATISFACTION

» **97%** of visitors were satisfied with their trip to Maine

» **4 in 5** visitors were very satisfied with their trip to Maine (**+1%** point from 2023)

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OVERCROWDING

» **46%** of visitors thought the number of visitors during their trip to Maine was fine

» **38%** of visitors thought Maine was not overcrowded at all

» **12%** of visitors though it was a little overcrowded

DETAILED FINDINGS

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VISITOR JOURNEY: IMPACT OF TOURISM

Pre-Visit → Traveler Profile → Trip Experience → Post-Trip Evaluation → **Impact of Tourism**

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KEY PERFORMANCE INDICATORS

Economic Impact	2022	2023	2024	Δ% from '23
Number of Visitors	876,000	1,023,400	921,700	- 9.9%
Visitor Days*	5,845,700	6,233,700	5,601,000	- 10.1%
Room nights generated	952,000	1,056,900	985,600	- 6.7%
Direct expenditures	$619,720,700	$654,941,700	$708,090,100	+ 8.1%
Total economic impact	$1,006,035,200	$1,059,166,500	$1,120,941,300	+ 5.8%

*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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EMPLOYMENT IMPACTS

Maine Highlands Jobs	2022	2023*	2024	Δ% from '23
Jobs supported (direct)	6,400	6,200	6,500	+ 4.8%
Total jobs supported	8,460	8,300	8,800	+ 6.0%

Maine Highlands Wages	2022	2023*	2024	Δ% from '23
Wages paid (direct)	$224,025,500	$209,218,100	$227,838,600	+ 8.9%
Total wages paid	$333,331,300	$325,008,900	$353,663,000	+ 8.8%

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

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RETURN ON INVESTMENT

Return on Investment	2022	2023*	2024
Visitors per job supported	104	123	105
State & local taxes supported	$92,990,000	$98,669,900	$107,049,000
Tax savings per household	$1,329	$1,383	$1,469

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

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LODGING METRICS*

Lodging Metrics	2022	2023	2024	Δ% from '23
Occupancy Rate (%)	51.7%	52.6%	49.1%	- 6.5%
Average Daily Rate	$153.34	$148.89	$150.13	+ 0.8%
RevPAR	$79.28	$78.26	$73.76	- 5.8%
Total Lodging Revenue**	$156,182,300	$158,432,000	$161,405,900	+ 1.9%

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

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VISITOR JOURNEY : PRE-VISIT

Pre-Visit → Traveler Profile → Trip Experience → Post-Trip Evaluation → Impact of Tourism

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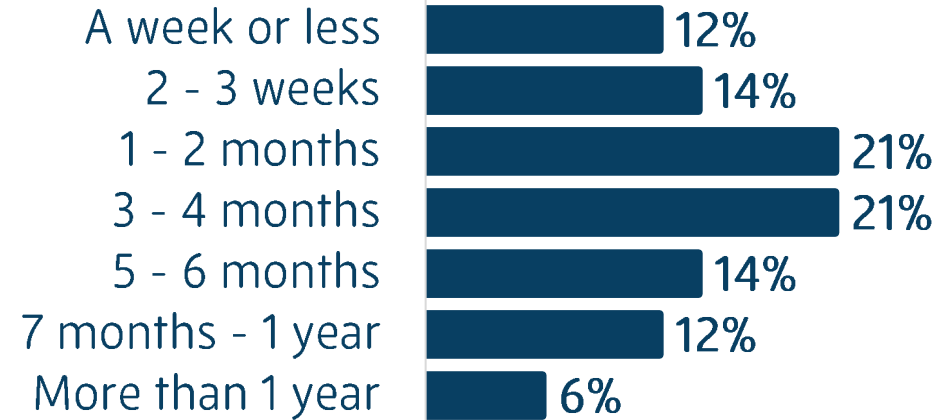
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TRIP PLANNING CYCLE

» Typical visitors began planning their trip **74 days** in advance (+9 days from 2023)

» **74%** of visitors started planning their trip a month or more in advance of their trip
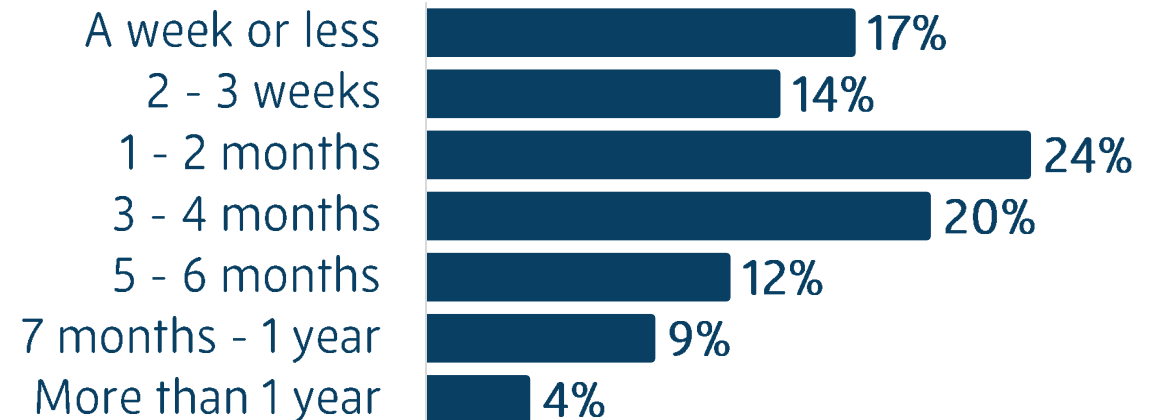
» Typical visitors booked their accommodations **54 days** in advance (+10 days from 2023)

» **55%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

A week or less	12%
2 - 3 weeks	14%
1 - 2 months	21%
3 - 4 months	21%
5 - 6 months	14%
7 months - 1 year	12%
More than 1 year	6%

Booked Accommodations/Made Trip Decisions

A week or less	17%
2 - 3 weeks	14%
1 - 2 months	24%
3 - 4 months	20%
5 - 6 months	12%
7 months - 1 year	9%
More than 1 year	4%

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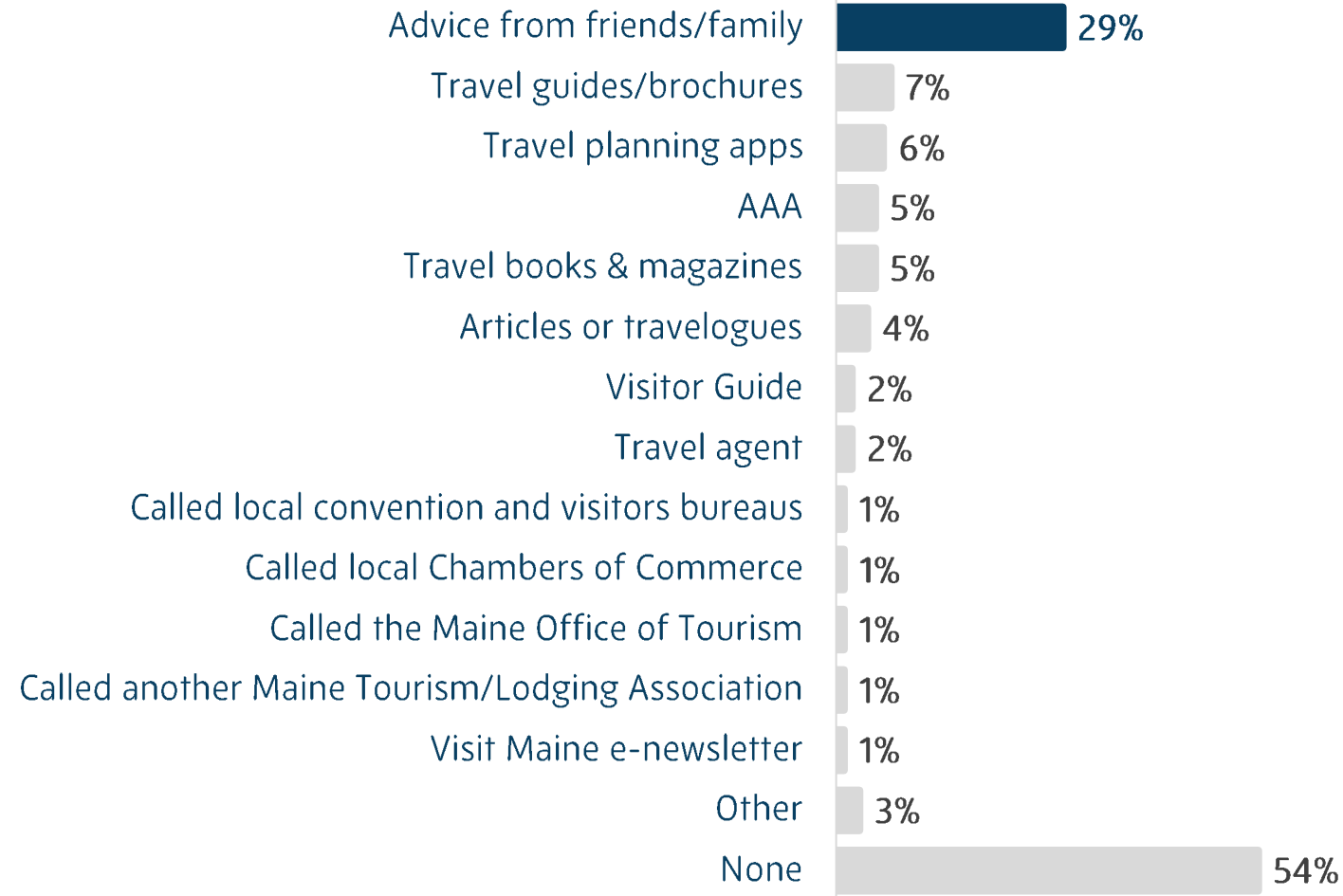downs & st. germain
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ONLINE TRIP PLANNING SOURCES*

» Over **2 in 3** visitors used one or more online resources to help them plan their trip in Maine

» Nearly **3 in 10** visitors used an online search engine, such as Google, to help them plan their trip in Maine

» Nearly **1 in 4** used an airline website to help them plan their trip in Maine (+6% points from 2023)

» Over **1 in 5** used an online travel agency to help them plan their trip

Source	%
Online search engines	29%
Airline websites	23%
Online travel agency	21%
Hotel websites	16%
Airbnb	14%
TripAdvisor	11%
Facebook	10%
Instagram	9%
YouTube	8%
Traveler reviews/blogs/stories	7%
VisitMaine.com	6%
Vacation rental websites	5%
Vrbo	4%
VisitBarHarbor.com	4%
DowneastAcadia.com	3%
MaineTourism.com	3%
Visit Maine social media	2%
DiscoverNewEngland.com	1%
TheMaineHighlands.com	1%
MainesMidCoast.com	1%
TheMaineBeaches.com	1%
VisitPortland.com	1%
MaineLakesandMountains.com	1%
X (Formerly Twitter)	1%
VisitAroostook.com	<1%
KennebecValley.org	<1%
Other	5%
None	33%

*Multiple responses permitted.

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52

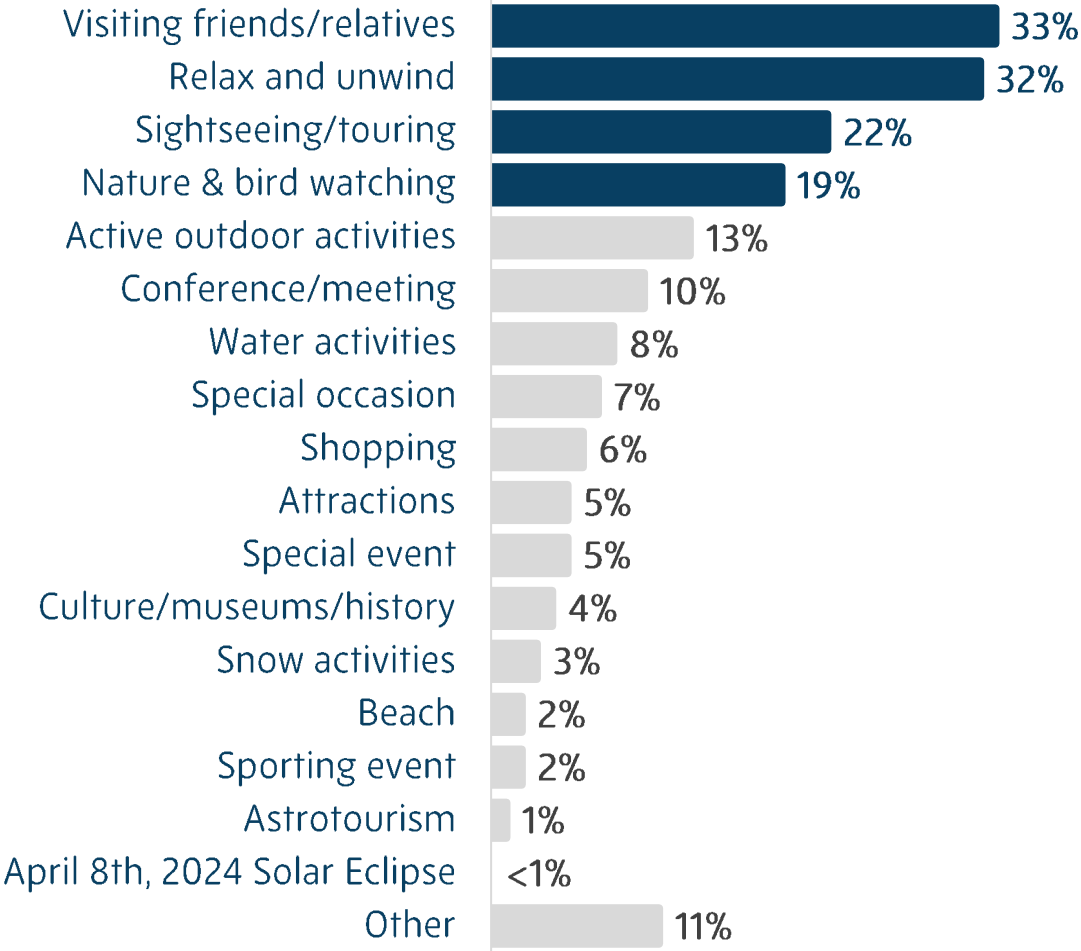MAINE.
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OTHER TRIP PLANNING SOURCES*

» Nearly **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

Source	%
Advice from friends/family	29%
Travel guides/brochures	7%
Travel planning apps	6%
AAA	5%
Travel books & magazines	5%
Articles or travelogues	4%
Visitor Guide	2%
Travel agent	2%
Called local convention and visitors bureaus	1%
Called local Chambers of Commerce	1%
Called the Maine Office of Tourism	1%
Called another Maine Tourism/Lodging Association	1%
Visit Maine e-newsletter	1%
Other	3%
None	54%

*Multiple responses permitted.

REASONS FOR VISITING*

» **1 in 3** visitors came to Maine to visit friends/relatives

» Nearly **1 in 3** visitors came to Maine to relax and unwind

» Around **1 in 5** came to Maine for sightseeing and touring or for nature and bird watching

Visiting friends/relatives — 33%
Relax and unwind — 32%
Sightseeing/touring — 22%
Nature & bird watching — 19%
Active outdoor activities — 13%
Conference/meeting — 10%
Water activities — 8%
Special occasion — 7%
Shopping — 6%
Attractions — 5%
Special event — 5%
Culture/museums/history — 4%
Snow activities — 3%
Beach — 2%
Sporting event — 2%
Astrotourism — 1%
April 8th, 2024 Solar Eclipse — <1%
Other — 11%

*Multiple responses permitted.

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TV SHOWS & FILM

» **3%** of visitors said a TV show or film inspired their trip to Maine

» Over **1 in 4** visitors who were inspired by a TV show or film said it made them think about Maine as a place to visit

» **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

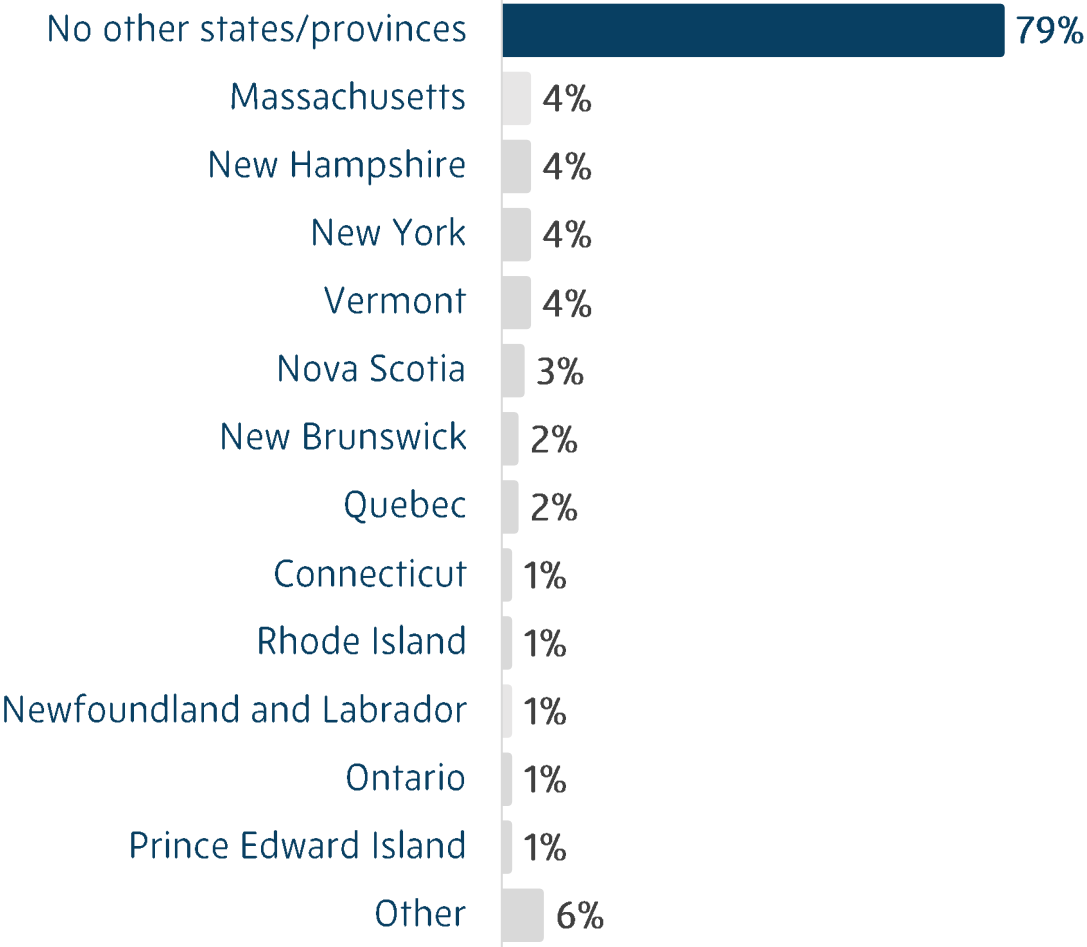|	
Seeing Maine in a film or TV show made me think about Maine as a place to visit	27%
I was considering Maine as a destination option and visiting a location related to a TV show or film was the deciding factor	23%
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	22%
Visiting a location related to a TV show or film was the main reason I visited Maine	15%
Something else	13%

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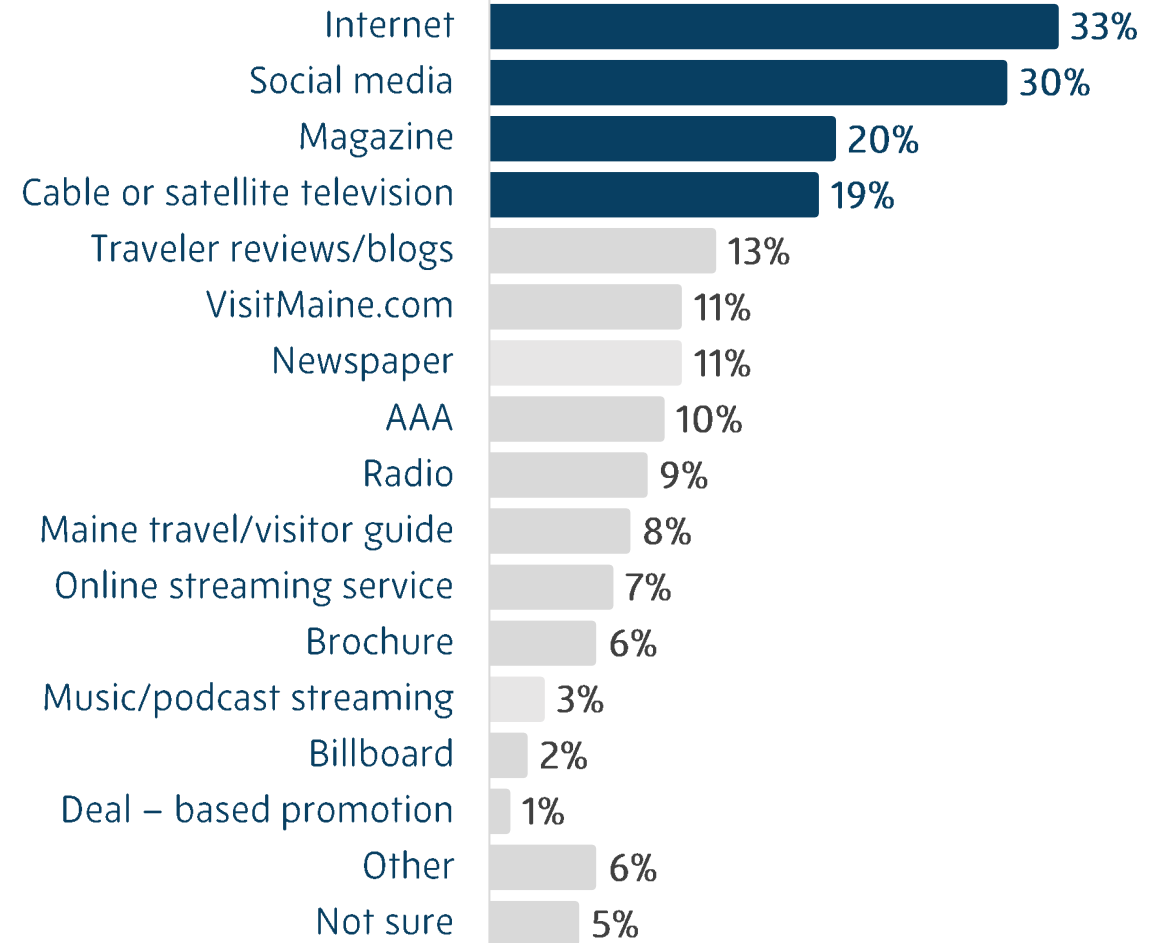VISITMAINE.COM

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OTHER STATES & PROVINCES CONSIDERED*

» Nearly **4 in 5** visitors considered visiting **ONLY** Maine while planning their trips (+2% points from 2023)

No other states/provinces	79%
Massachusetts	4%
New Hampshire	4%
New York	4%
Vermont	4%
Nova Scotia	3%
New Brunswick	2%
Quebec	2%
Connecticut	1%
Rhode Island	1%
Newfoundland and Labrador	1%
Ontario	1%
Prince Edward Island	1%
Other	6%

*Multiple responses permitted.

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PRE-TRIP RECALL OF ADVERTISING*

Base: 27% of visitors who recalled advertising

» Over **1 in 4** visitors recalled advertising or promotions for Maine prior to their trip (-2% points from 2023)

» Visitors who recalled this advertising primarily saw it on the Internet or on social media

» This information influenced **13% of all** visitors to visit Maine (+1% point from 2023)

Source	%
Internet	33%
Social media	30%
Magazine	20%
Cable or satellite television	19%
Traveler reviews/blogs	13%
VisitMaine.com	11%
Newspaper	11%
AAA	10%
Radio	9%
Maine travel/visitor guide	8%
Online streaming service	7%
Brochure	6%
Music/podcast streaming	3%
Billboard	2%
Deal – based promotion	1%
Other	6%
Not sure	5%

*Multiple responses permitted.

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VISITOR JOURNEY : TRAVELER PROFILE

Pre-Visit → **Traveler Profile** → Trip Experience → Post-Trip Evaluation → Impact of Tourism

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VISITOR ORIGINS

Intl 2%

Canada 8%

Maine 16%

West 7%

New England 12%

Midwest 10%

Mid-Atlantic 20%

Southwest 5%

Southeast 20%

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TOP ORIGIN STATES & PROVINCES

» **66%** of visitors traveled to/within Maine from **12** U.S. states and Canadian provinces

» **16%** of visitors were residents of Maine traveling throughout the state

State	Percent
Maine	16%
Florida	11%
New Brunswick	6%
Massachusetts	5%
New York	5%
New Jersey	4%
Pennsylvania	4%
New Hampshire	3%
Texas	3%
Virginia	3%
North Carolina	3%
California	3%

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TOP ORIGIN MARKETS

» **3 in 10** visitors traveled from **11** 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%
Tampa - Clearwater - St. Petersburg	3%
Boston	2%
Philadelphia	2%
Fredericton, CAN	2%
Orlando	2%
Chicago	2%
Bangor	2%
Miami - Ft. Lauderdale	2%
Dallas - Ft. Worth	2%

[1] Includes some markets in New Jersey, Pennsylvania, and Connecticut.
[2] Includes some markets in Maryland, Virginia, and West Virginia.

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TRAVEL PARTIES

» Typical visitors traveled to Maine in parties of **2.6** people

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

» Nearly **3 in 10** traveled alone

» **13%** of visitors traveled with one or more children in their travel party
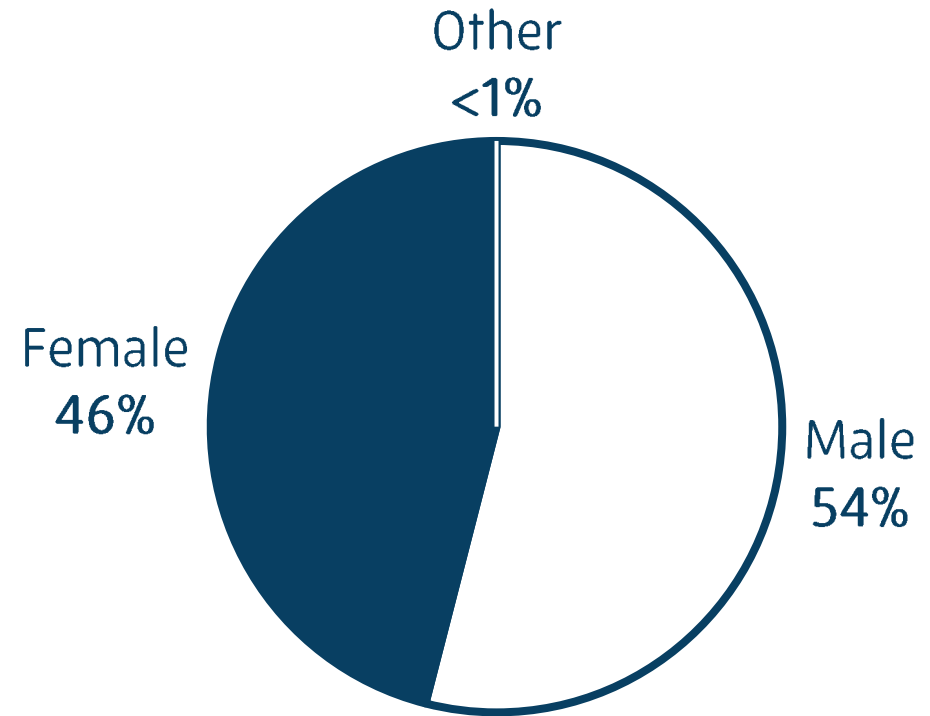
Travel Party Composition

As a couple	36%
Traveled alone	28%
As a family	22%
With other couples/friends	11%
With business associates	3%
In a tour group	<1%
Other	<1%

Children in Travel Party*

No children	87%
Children younger than 6	4%
Children 6 – 12	6%
Children 13 – 17	5%

*Multiple responses permitted.

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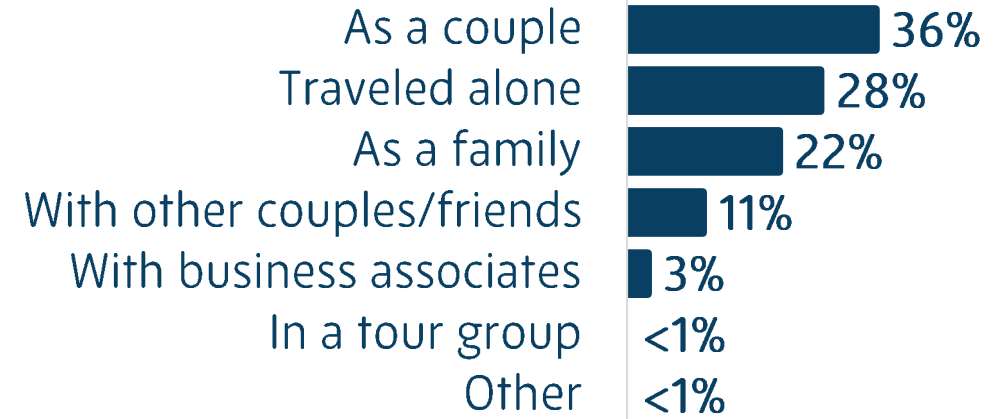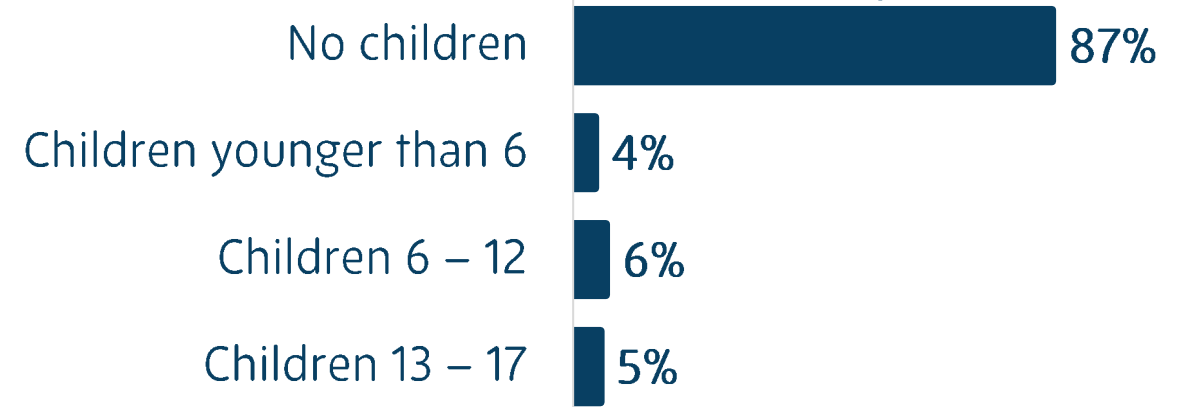
GENDER*

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

Other
<1%

Female
46%

Male
54%

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AGE*

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

Under 25   7%
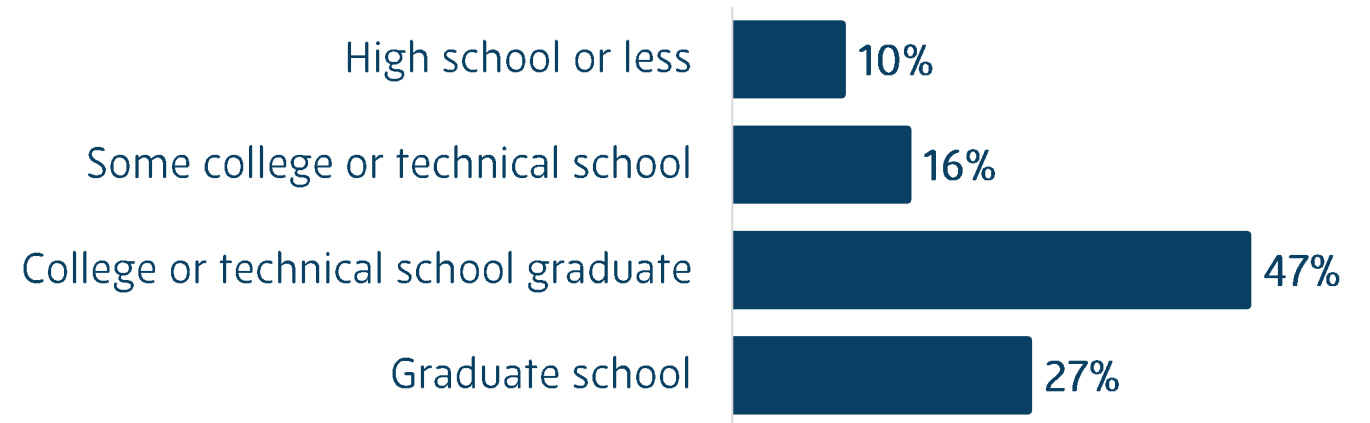25 - 34   19%
35 - 44   20%
45 - 54   15%
55 - 65   18%
Over 65   21%
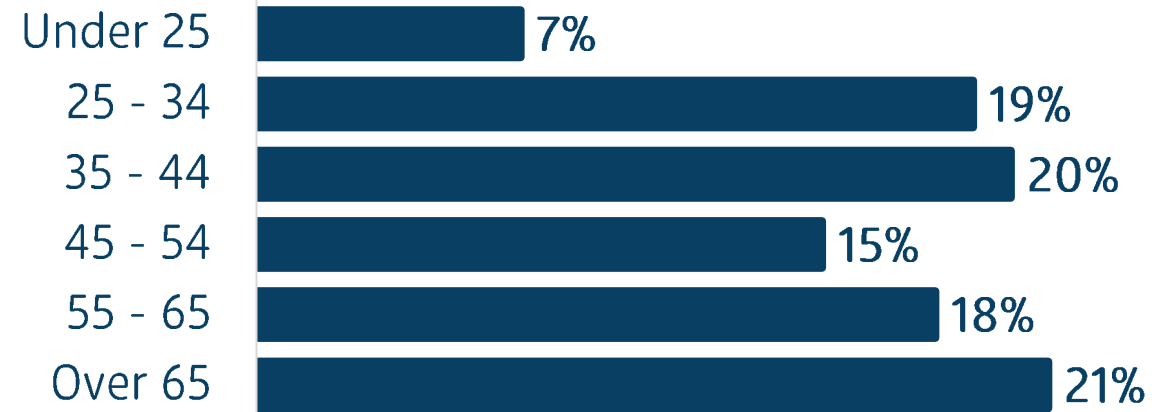
*Age of member of travel party surveyed.
The demographic data reflects the surveyed individual, who may not fully represent the entire travel party or all visitors to the area.
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RACE & ETHNICITY*

» **9 in 10** visitors to Maine were white

White ████████████████████████ **90%**
Hispanic █ **3%**
Asian █ **3%**
Black █ **3%**
Indigenous █ **1%**
Other **<1%**

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EDUCATIONAL ATTAINMENT*

» Nearly **3 in 4** visitors have a college/technical school degree or higher

High school or less — 10%

Some college or technical school — 16%

College or technical school graduate — 47%

Graduate school — 27%

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MARITAL STATUS*

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

Single/widowed
31%

Married/living with partner
69%

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EMPLOYMENT STATUS*

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

Employed full-time � **60%**
Employed part-time **5%**
Contract/freelance/temporary employee **5%**
Retired **23%**
Not currently employed **3%**
Student **4%**

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HOUSEHOLD INCOME

» The median household income of visitors to Maine is **$108,000** per year

» **29%** of visitors to Maine earned more than $150,000 per year

Income	Percent
Less than $25,000	5%
$25,000 - $49,999	8%
$50,000 - $74,999	16%
$75,000 - $99,999	17%
$100,000 - $149,999	25%
$150,000 - $199,999	13%
$200,000 - $249,999	6%
$250,000 or more	10%
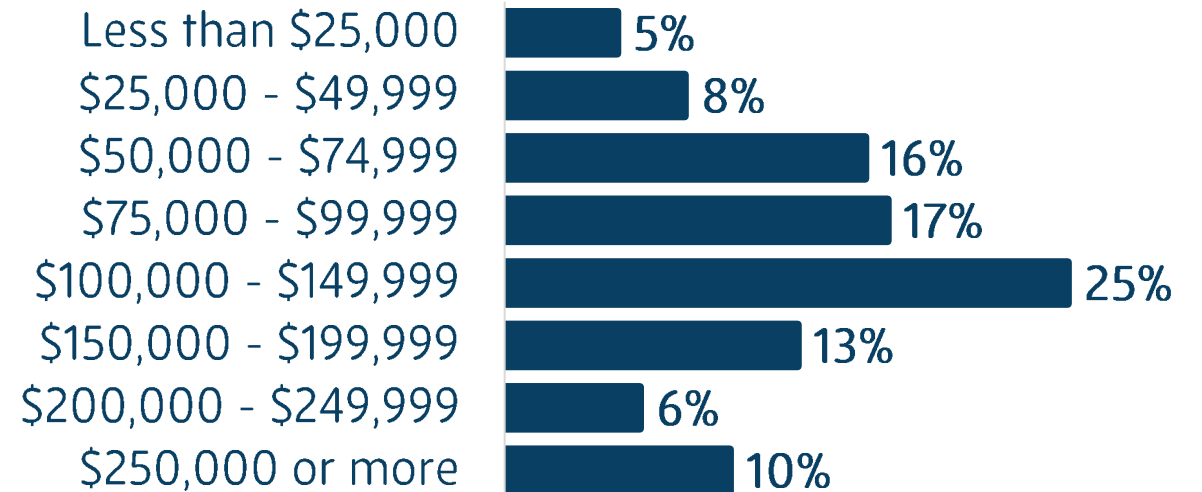
NEW & RETURNING VISITORS

» **23%** of visitors were traveling in Maine for the first time (-2% points from 2023)

» Maine has high repeat and loyal visitors, as **36%** had previously traveled in Maine more than 10 times (-4% points from 2023)

This is my first time — 23%
2 - 5 times — 27%
6 - 10 times — 14%
11+ times — 36%
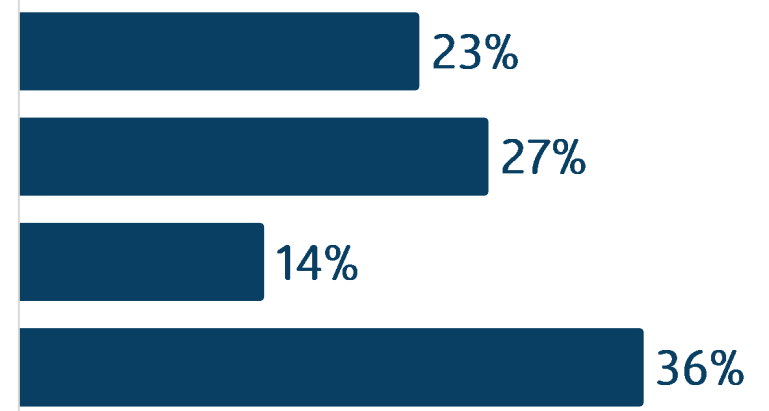
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Pre-Visit

Traveler Profile

Trip Experience

Post-Trip Evaluation

Impact of Tourism

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MODES OF TRANSPORTATION

» Maine is a drive-market for most visitors, with **79%** choosing to travel by car over plane, motor coach/bus, or train

» Most visitors who flew to Maine arrived at Bangor International Airport

Mode	Percentage
Drove to Maine	79%
Flew into Bangor Intl Airport	10%
Flew into Portland Intl Jetport	4%
Flew into Boston Logan Intl	2%
Took a motor coach tour or bus	2%
Flew into another airport	1%
Other	2%

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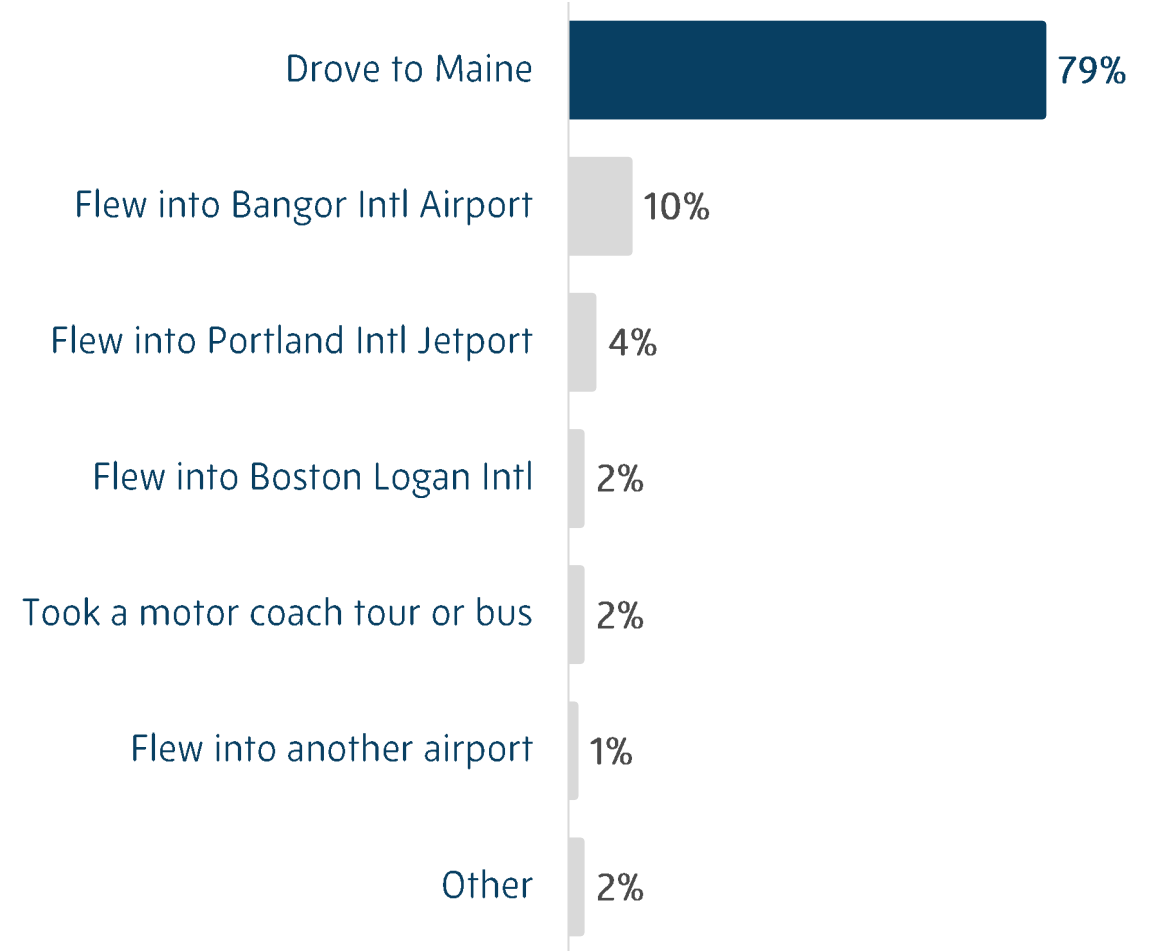
NIGHTS STAYED

» **87%** of visitors stayed one or more nights in Maine on their trip (+3% points from 2023)

» Typical visitors stayed **6.0*** nights in Maine on their trips

» Typical visitors staying overnight in paid accommodations stayed **5.6** nights in Maine on their trips
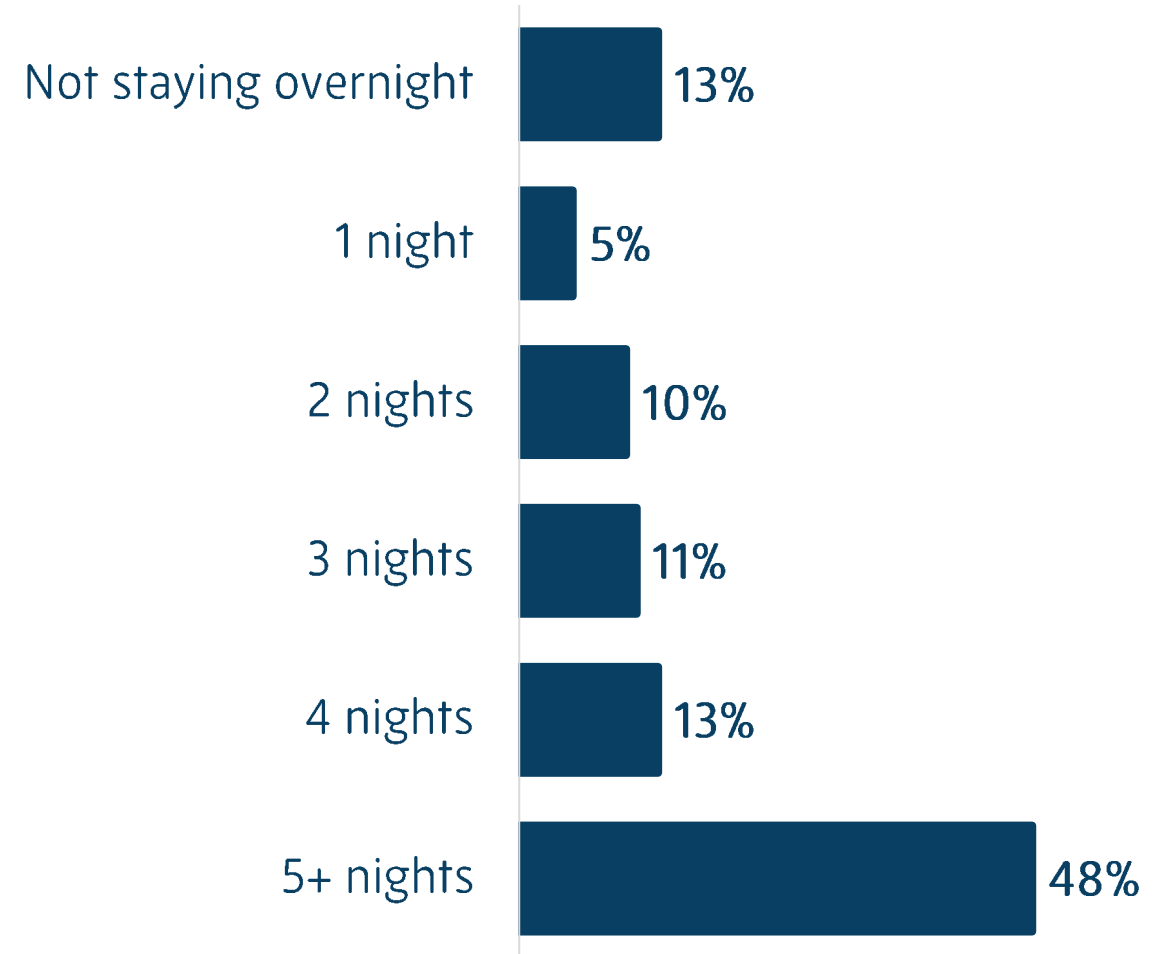
Not staying overnight — 13%

1 night — 5%

2 nights — 10%

3 nights — 11%

4 nights — 13%

5+ nights — 48%

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

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ACCOMMODATIONS

» **3 in 10** visitors stayed overnight in a hotel/motel/resort

» Over **1 in 5** visitors stayed with friends/family

» Around **1 in 8** visitors came just for the day or stayed in a personal second home

Accommodation	Percentage
Hotel/motel/resort	30%
Friends/family home	22%
Not spending the night	13%
Personal second home	12%
Vacation rental home	9%
Bed & Breakfast/Inn	4%
Campground/RV Park	3%
Wilderness camping	2%
Sporting camp/wilderness lodge	2%
Outdoor Outfitter	<1%
Other	3%

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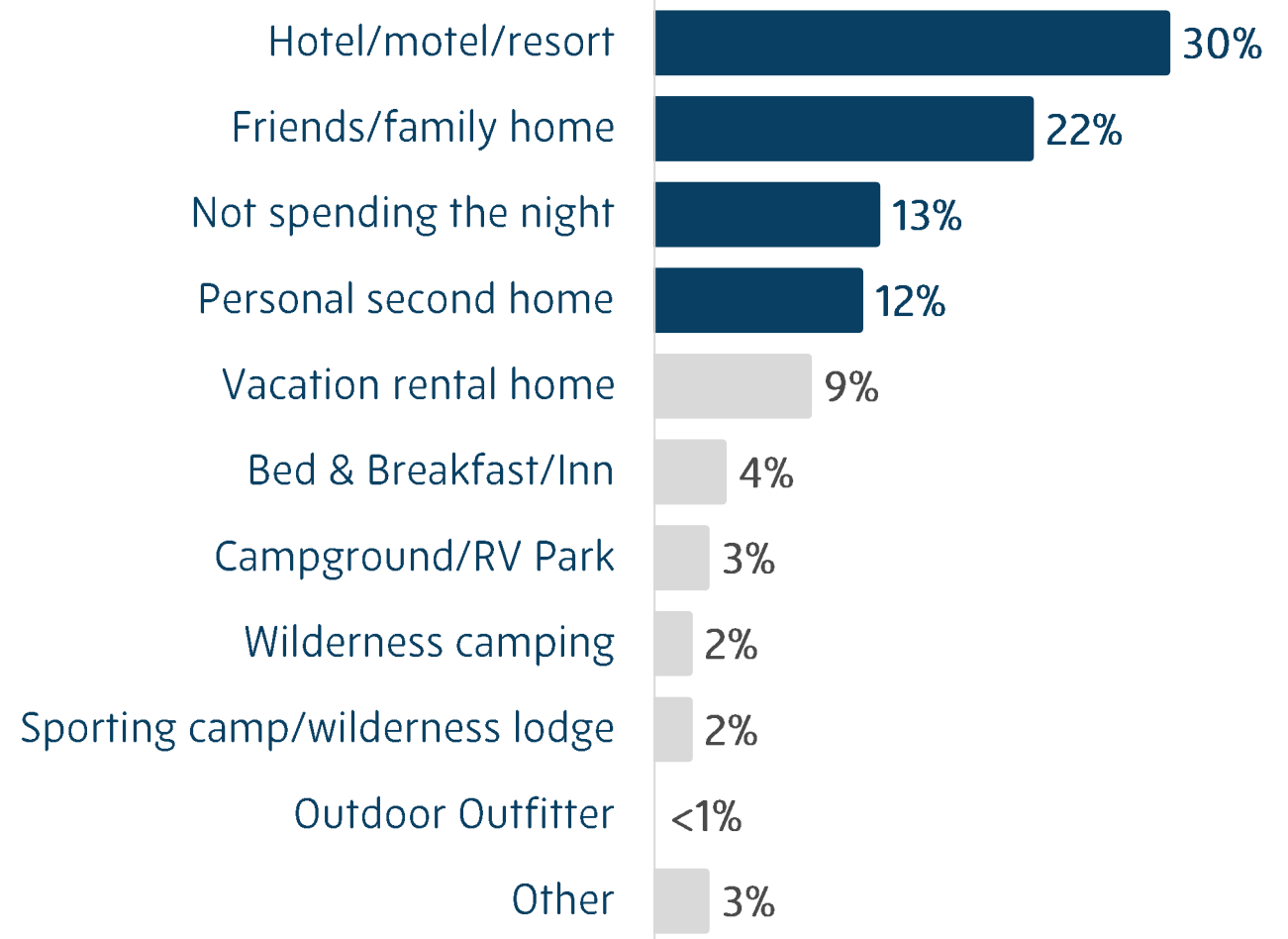
BOOKING METHODS

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

» **1 in 4** booked through an online travel agency

Booking Method	Percentage
Directly with the hotel/condo	39%
Online travel agency	25%
Airbnb	12%
Short term rental service	4%
Vacation rental company	2%
Travel package provider	2%
Offline travel agent	1%
Group tour operator	1%
Other	14%

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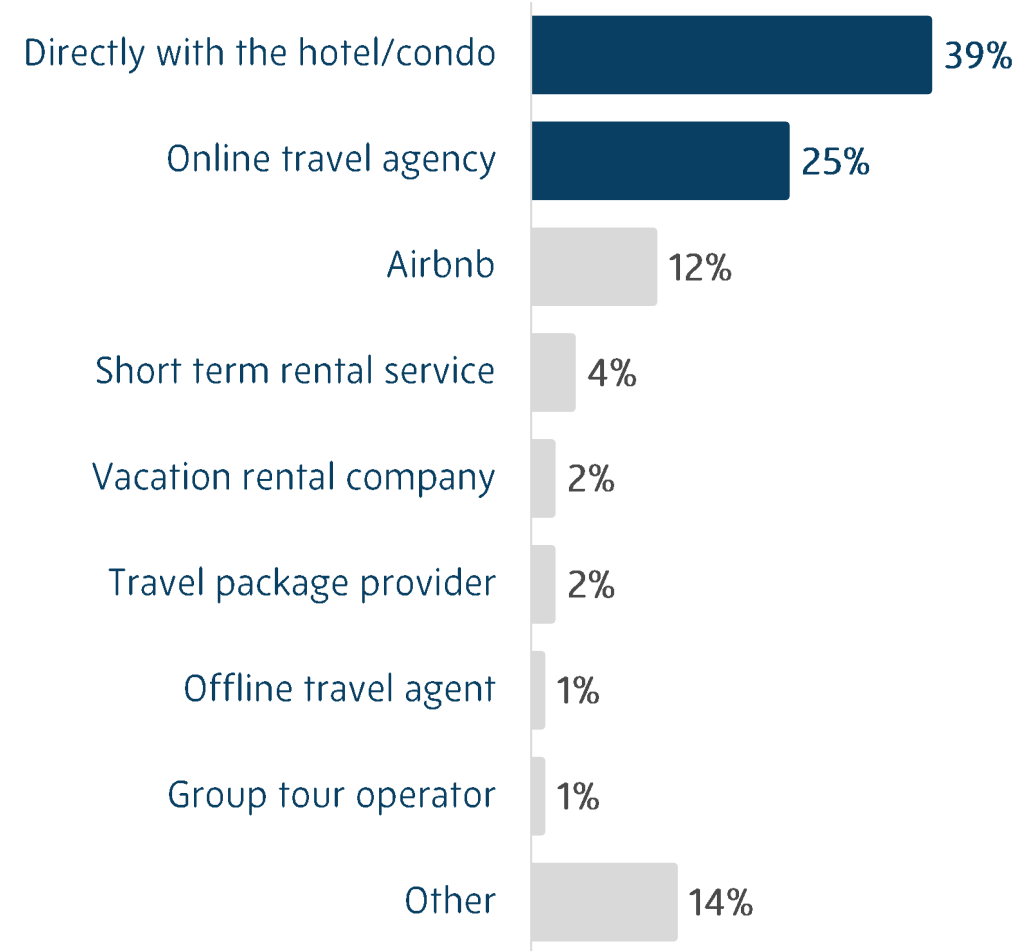
IN-MARKET VISITOR RESOURCES*

» Visitors were most likely to rely on navigation websites/apps (i.e., Google Maps, etc.) to plan activities in-market

» **2 in 5** visitors did not use any resources to plan activities while they were in-market

Resource	Percentage
Navigation website/apps	34%
Restaurant website/app	15%
Personal social media	11%
Visitor Information Centers	10%
Hotel/resort website/app	9%
Trip planning app	8%
Destination social media	7%
Materials from hotel/campground	6%
Booking website/app	6%
VisitMaine.com	5%
Airline website/app	5%
Chambers of Commerce	1%
Other	4%
None	40%

*Multiple responses permitted.

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VISITOR ACTIVITIES*

» **2 in 3** visitors engaged in food/beverage/culinary activities during their trip to Maine (+3% points from 2023)

» Nearly **half** of visitors went touring/sightseeing during their trip to Maine

» Around **2 in 5** engaged in active outdoor activities or went shopping while in Maine

Activity	%
Food/beverage/culinary	66%
Touring/sightseeing	45%
Active outdoor activities	41%
Shopping	40%
Water activities	20%
History/culture	17%
Astrotourism	9%
Business conference/meeting	7%
Entertainment/attractions	5%
April 8th, 2024 Solar Eclipse	<1%
Other	6%

*Multiple responses permitted.

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DETAILED VISITOR ACTIVITIES*

Activity	%	Activity	%	Activity	%
Going to local brew pubs/craft breweries	31%	Motor boating	9%	Mountain/Fat Biking	2%
Sightseeing	31%	Fishing	8%	Attend popular music concerts/events	2%
Hiking/climbing/backpacking	28%	Shopping in downtown areas	8%	Alpine skiing/snowboarding	2%
Enjoying the mountain views	26%	Shopping for unique/locally produced goods	8%	Snowshoeing	2%
Enjoying the ocean views/rocky coast	24%	Viewing fall colors	7%	Painting/drawing/sketching	2%
Ate lobster	23%	Visit art museums/local artisan studios	7%	Water skiing/jet skiing	1%
Ate other local seafood	21%	Get to know the local people and/or culture	6%	White water rafting	1%
Driving for pleasure	19%	Shopping for antiques/local arts and crafts	6%	Nordic skiing	1%
Consumed other locally produced Maine foods	16%	Tours of communities/local architecture	6%	Sailing	1%
Exploring State and National Parks	16%	Enjoying local food at fairs/festivals	6%	Amusement/theme parks	1%
Shopping at malls	15%	Going to the beach	5%	Pool swimming	1%
Enjoyed unique Maine food or beverages	15%	Shopping for "Made in Maine" products	5%	Children's museums	1%
Shopping for gifts/souvenirs	15%	Camping	6%	Agricultural fairs	<1%
Outlet shopping	13%	Riding all-terrain vehicles	7%	Attend sporting events	<1%
Photography	13%	Enjoyed high-end cuisine or five-star dining	4%	Outdoor fun centers	<1%
Wildlife viewing/bird watching	13%	Hunting	4%	Water parks	<1%
Visit historic sites/museums	12%	Ate farm-to-table or organic cuisine	3%	Animal parks/zoos	<1%
Outdoor swimming	9%	Snowmobiling	3%	Surfing	<1%
Visited Farmer's Markets	8%	Bicycling touring	3%	Attend operas/classical music events	<1%
Nature cruises or tours	9%	Bars/nightlife	2%	Horseback riding	<1%
Canoeing/kayaking	9%	Attend plays/musicals/theatrical events	2%	Summer camps	<1%

*Multiple responses permitted.

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DAILY TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	$239	$0	$0
Transportation	$70	$46	$59
Groceries	$27	$34	$11
Restaurants	$139	$77	$65
Shopping	$84	$59	$64
Activities & Attractions	$62	$31	$23
Other	$23	$16	$8
Daily Spending	**$644**	**$263**	**$230**

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TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	$1,338	$0	$0
Transportation	$392	$396	$59
Groceries	$151	$292	$11
Restaurants	$778	$662	$65
Shopping	$470	$507	$64
Activities & Attractions	$347	$267	$23
Other	$129	$138	$8
Total Spending	**$3,606**	**$2,262**	**$230**

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LODGING AMENITIES*

» An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for over **7 in 10** visitors

» Price for accommodations included parking for nearly **3 in 5** visitors

» Food was included in accommodations' pricing for **24%** of visitors
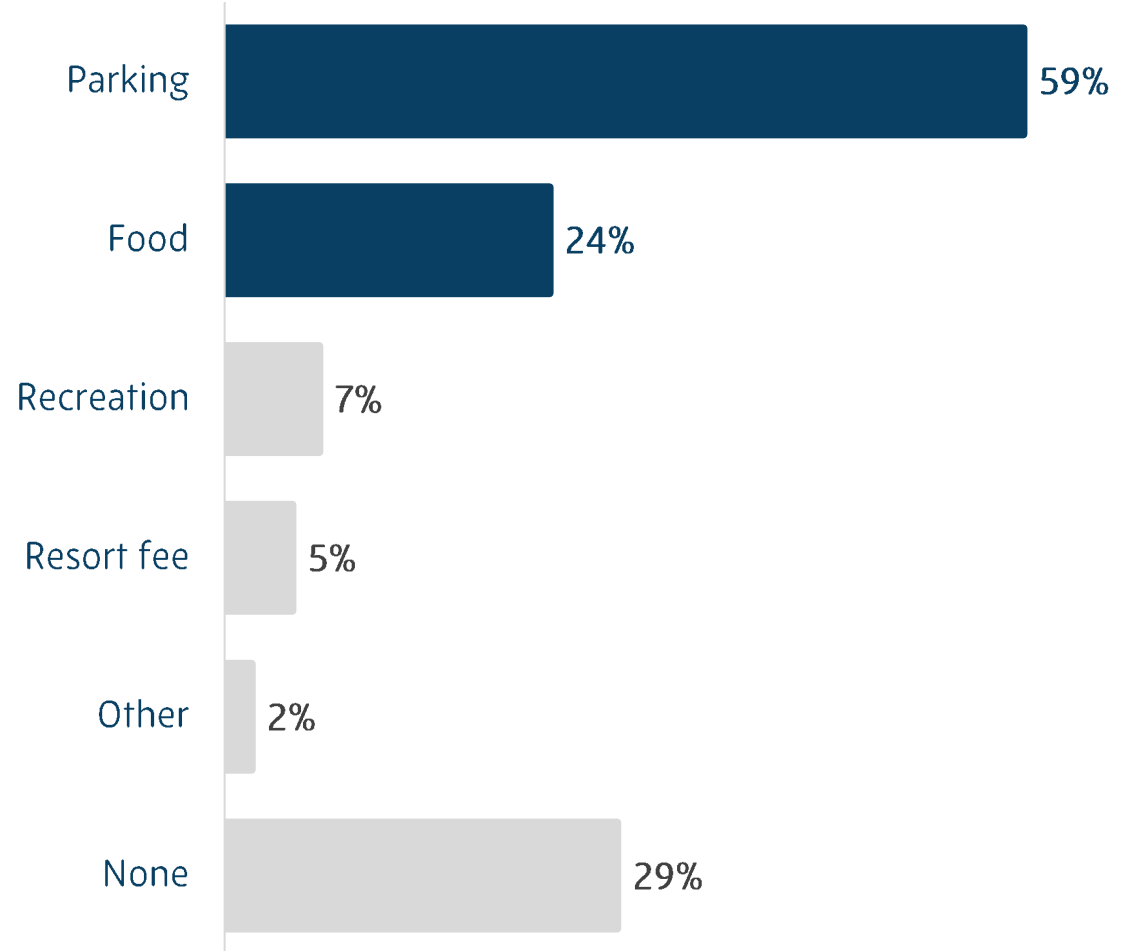
Amenity	Percentage
Parking	59%
Food	24%
Recreation	7%
Resort fee	5%
Other	2%
None	29%

*Multiple responses permitted.

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OTHER STATES & PROVINCES VISITED*

No other states/provinces ████████████████████ 80%

New Hampshire █ 6%

Massachusetts █ 4%

New York █ 4%

Vermont █ 3%

New Brunswick █ 3%

Connecticut █ 2%

Nova Scotia █ 2%

Rhode Island █ 1%

Quebec █ 1%

Ontario █ 1%

Prince Edward Island █ 1%

Newfoundland and Labrador █ <1%

Other █ 5%

» **4 in 5** visitors did not visit any other U.S. state or Canadian province during their trip (+3% points from 2023)

*Multiple responses permitted.

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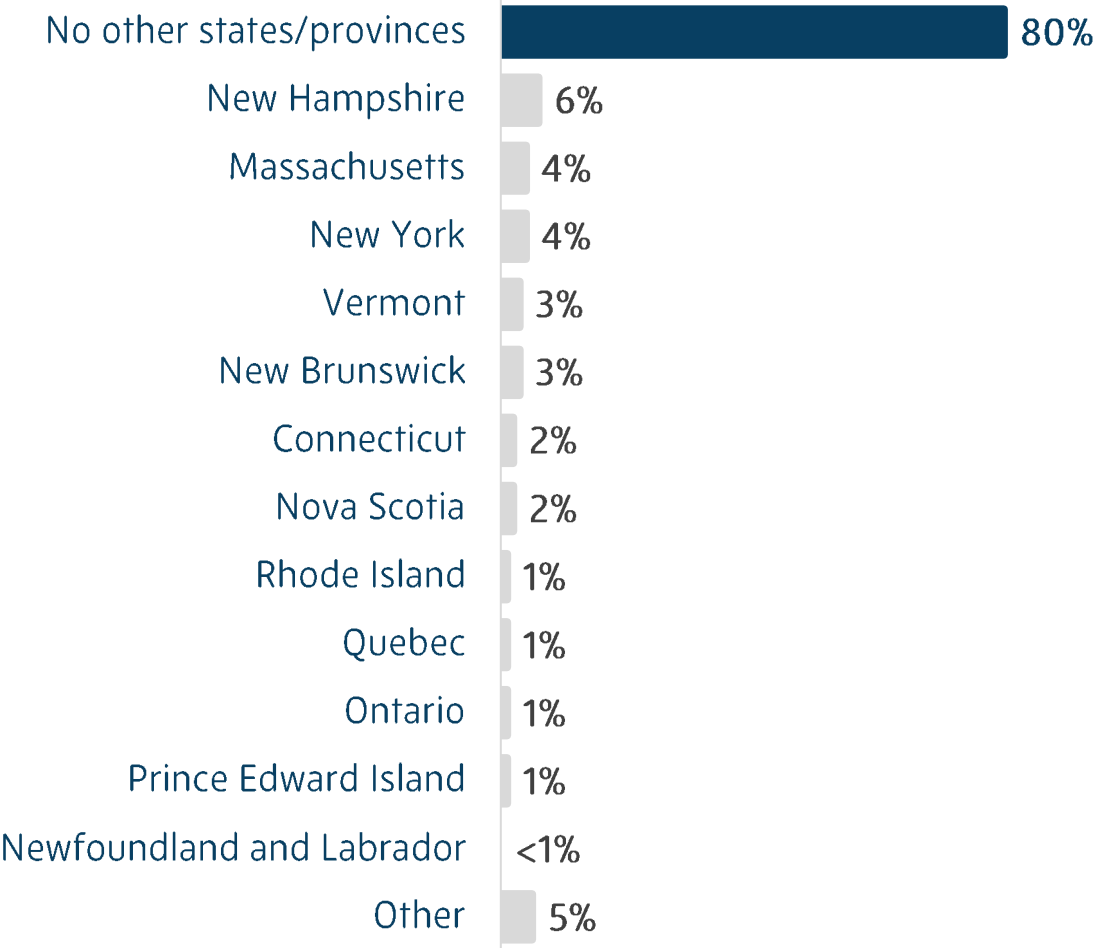
TRAVELING WITHIN MAINE*
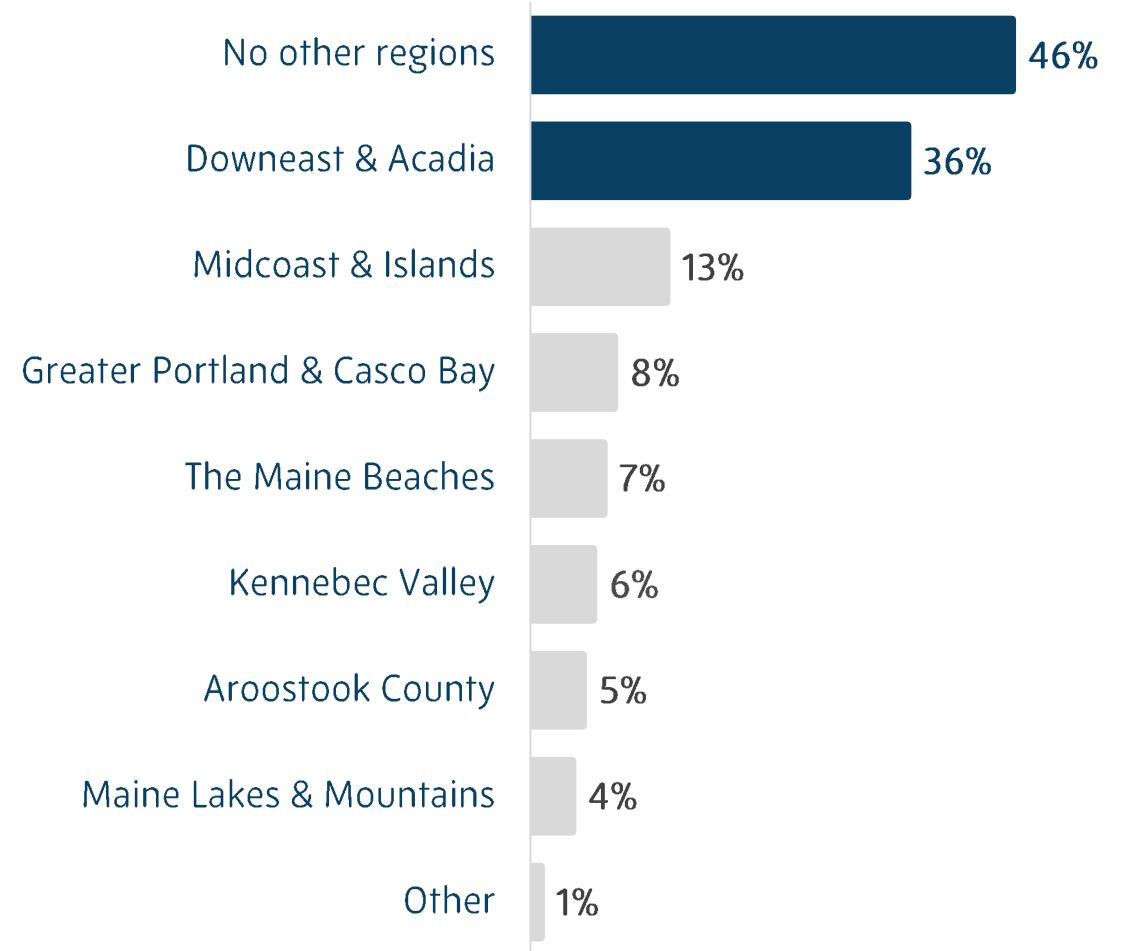
» Nearly **half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (+2% points from 2023)

» **36%** of visitors visited Downeast & Acadia in addition to their primary destination within Maine

Region	Percentage
No other regions	46%
Downeast & Acadia	36%
Midcoast & Islands	13%
Greater Portland & Casco Bay	8%
The Maine Beaches	7%
Kennebec Valley	6%
Aroostook County	5%
Maine Lakes & Mountains	4%
Other	1%

*Multiple responses permitted.

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RECOMMENDING MAINE & ITS REGIONS

Likelihood of Recommending Maine

Would recommend Maine — 96%

Would not recommend Maine — 1%

Not sure — 3%

» Like last year, **96%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
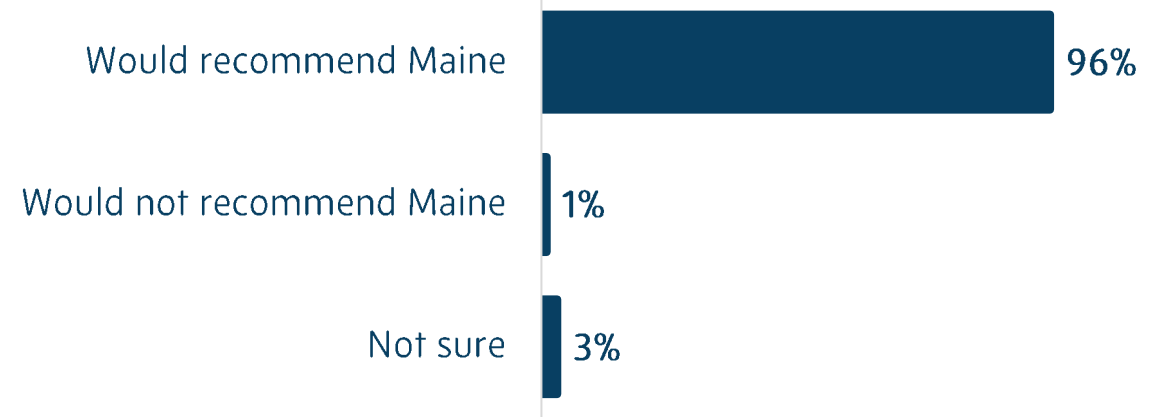
Likelihood of Recommending Region Visited
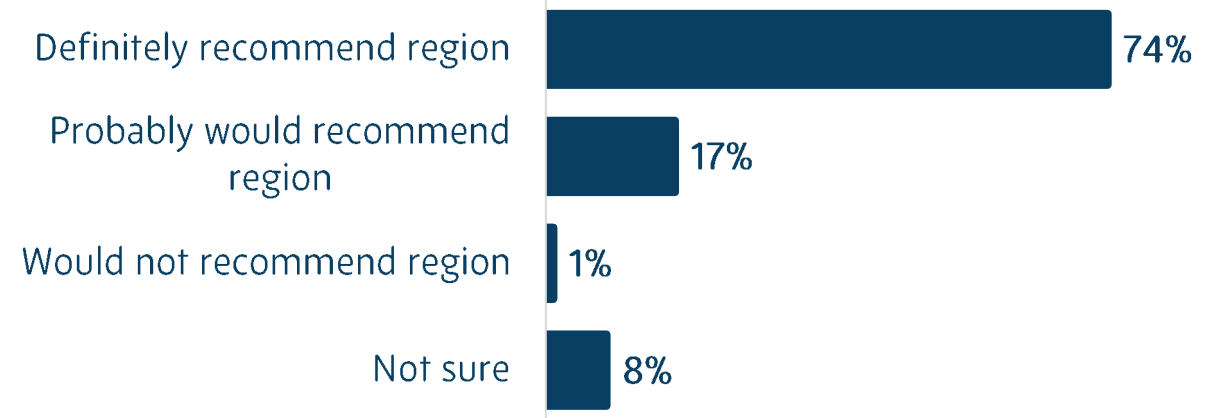
Definitely recommend region — 74%

Probably would recommend region — 17%

Would not recommend region — 1%

Not sure — 8%

» **91%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **74%** would definitely recommend

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LIKELIHOOD OF RETURNING TO MAINE

Definitely will return **78%**

Probably will return **17%**

Probably will not return* **1%**

Not sure* **4%**

» **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. Once is enough to see and do everything 2. Prefer a variety of destinations 3. Lack of activities and attractions.

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SATISFACTION

» **97%** of visitors were satisfied with their trip to Maine

» **4 in 5** visitors were very satisfied with their trip to Maine (+1% point from 2023)

Very satisfied ——— 80%

Satisfied ——— 17%

Dissatisfied ——— 1%

Don't know ——— 2%

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TRIP RATINGS

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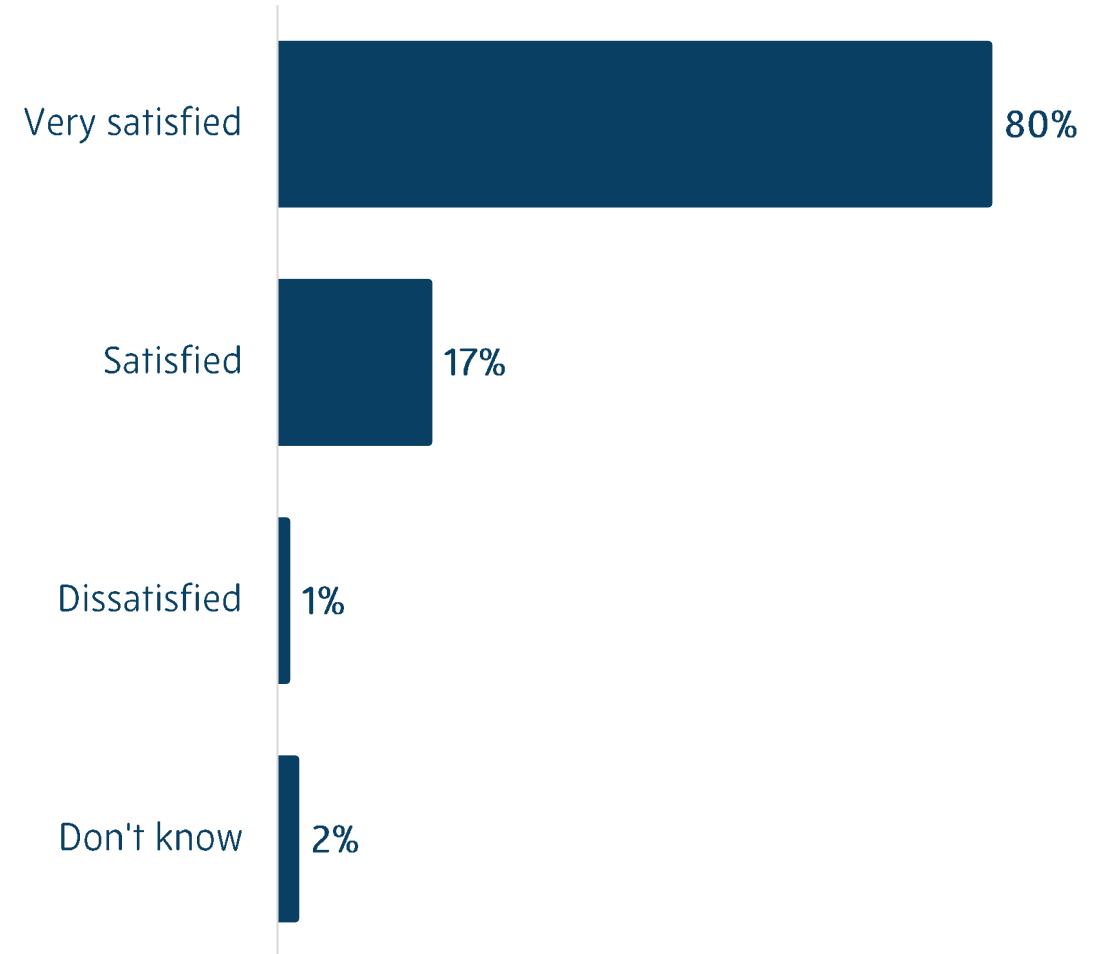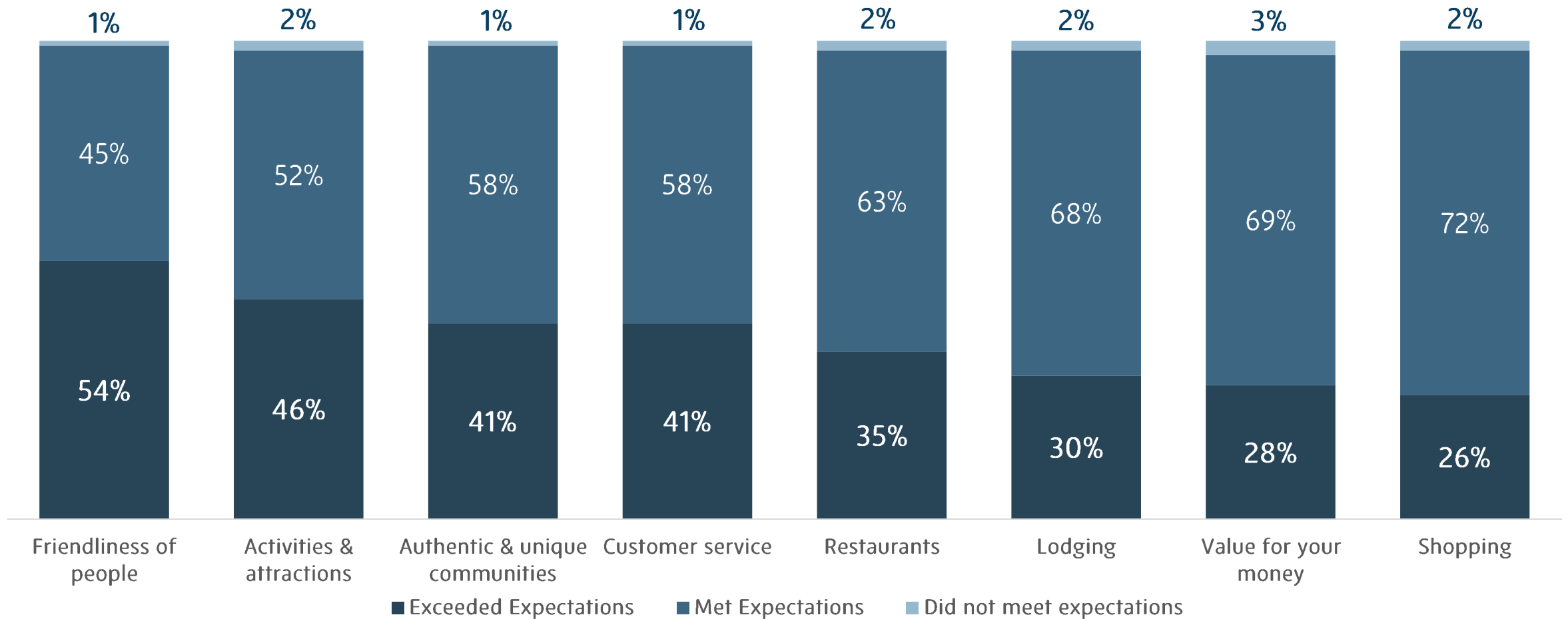
OVERCROWDING

» **46%** of visitors thought the number of visitors during their trip to Maine was fine (-2% points from 2023)

» Like last year, **12%** of visitors thought it was a little overcrowded

Overcrowded 2%

A little overcrowded 12%

The number of visitors was fine 46%

Not at all overcrowded 38%

Other 2%

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ANNUAL COMPARISONS

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VISITOR JOURNEY : PRE-VISIT

Pre-Visit → Traveler Profile → Trip Experience → Post-Trip Evaluation → Impact of Tourism

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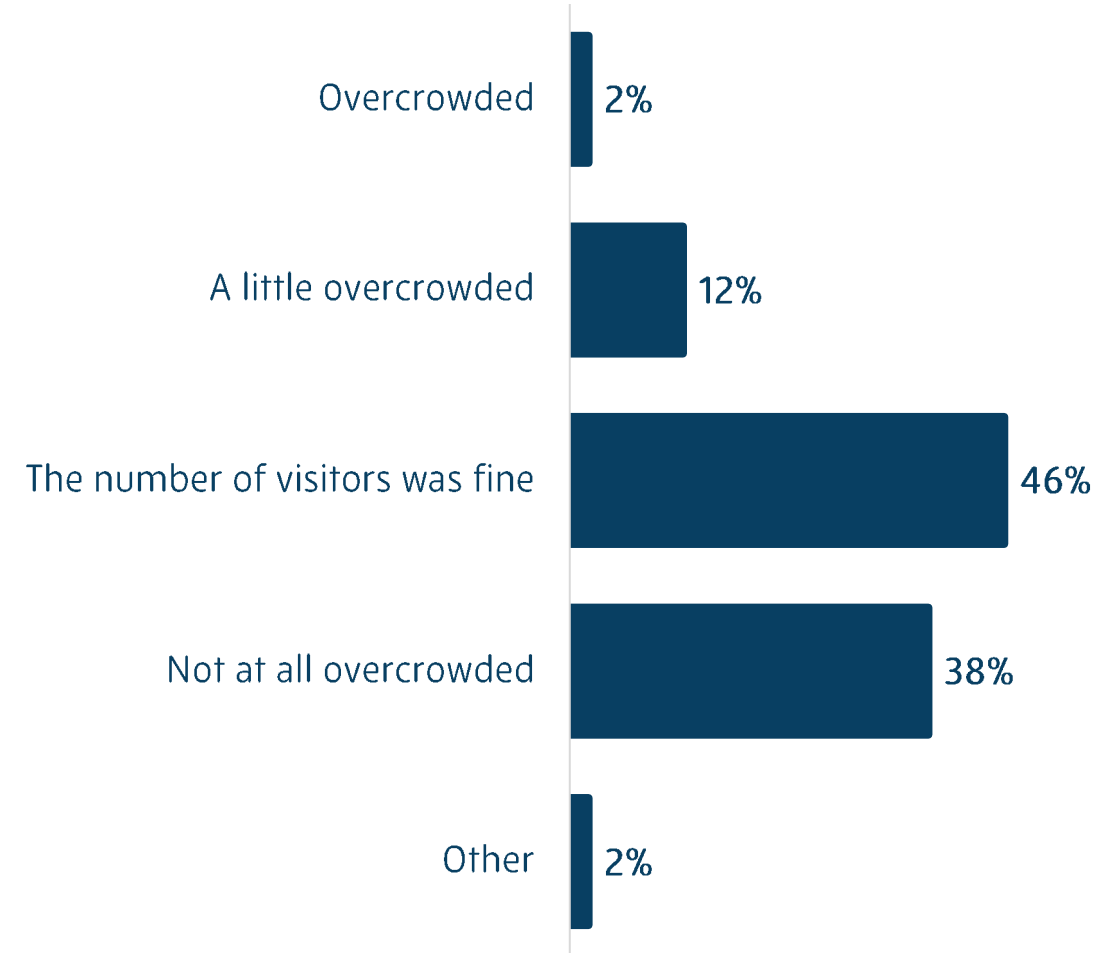
TRIP PLANNING CYCLE

Trip Planning Cycle	2023	2024
A week or less	15%	12%
2 - 3 weeks	16%	14%
1 - 2 months	23%	21%
3 - 4 months	20%	21%
5 - 6 months	11%	14%
7 months - 1 year	8%	12%
More than 1 year	7%	6%
Days in Planning Cycle	**55**	**64**

Booking Window	2023	2024
A week or less	20%	17%
2 - 3 weeks	17%	14%
1 - 2 months	27%	24%
3 - 4 months	17%	20%
5 - 6 months	8%	12%
7 months - 1 year	7%	9%
More than 1 year	4%	4%
Days in Booking Window	**44**	**54**

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ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2023	2024
Online search engines	27%	29%
Airline websites	17%	23%
Online travel agency	17%	21%
Hotel websites	13%	16%
Airbnb	10%	14%
TripAdvisor	11%	11%
Facebook	11%	10%
Instagram	7%	9%
YouTube	8%	8%
Traveler reviews/blogs/stories	8%	7%
VisitMaine.com	7%	6%
Vacation rental websites	3%	5%
Vrbo	5%	4%
VisitBarHarbor.com	5%	4%
DowneastAcadia.com	3%	3%
MaineTourism.com	3%	3%
Visit Maine social media	2%	2%
DiscoverNewEngland.com	1%	1%
TheMaineHighlands.com	2%	1%
MainesMidCoast.com	1%	1%
TheMaineBeaches.com	1%	1%
VisitPortland.com	1%	1%
MaineLakesandMountains.com	1%	1%
X (Formerly Twitter)	1%	1%
VisitAroostook.com	<1%	<1%
KennebecValley.org	<1%	<1%
Other	6%	5%
None	37%	33%

*Multiple responses permitted.

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OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2023	2024
Advice from friends/family	30%	29%
Travel guides/brochures	6%	7%
Travel planning apps	7%	6%
AAA	6%	5%
Travel books & magazines	7%	5%
Articles or travelogues	6%	4%
Visitor Guide	2%	2%
Travel agent	3%	2%
Called local convention and visitors bureaus	1%	1%
Called local Chambers of Commerce	1%	1%
Called the Maine Office of Tourism	1%	1%
Called another Maine Tourism/Lodging Association	1%	1%
Visit Maine e-newsletter	1%	1%
Other	4%	3%
None	53%	54%

*Multiple responses permitted.

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REASON FOR VISITING*

Reasons for Visiting	2023	2024
Visiting friends/relatives	33%	33%
Relax and unwind	29%	32%
Sightseeing/touring	23%	22%
Nature & bird watching	16%	19%
Active outdoor activities	9%	13%
Conference/meeting	11%	10%
Water activities	6%	8%
Special occasion	9%	7%
Shopping	7%	6%
Attractions	6%	5%
Special event	5%	5%
Culture/museums/history	3%	4%
Snow activities	7%	3%
Beach	3%	2%
Sporting event	2%	2%
Astrotourism	1%	1%
April 8th, 2024 Solar Eclipse	NA	<1%
Other	11%	11%

*Multiple responses permitted.

Maine Highlands

95

TV SHOWS & FILM

Trip Inspiration From Film	2023	2024
Yes	4%	3%
No	96%	96%
Don't know	<1%	1%

How Film Inspired Trip*	2023	2024
Seeing Maine in a film or TV show made me think about Maine as a place to visit	32%	27%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	32%	23%
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	11%	22%
Visiting a location related to a TV show or film was the main reason I visited Maine	16%	15%
Something else	9%	13%

Visited TV or Film Attractions**	2023	2024
Yes	3%	3%
No	95%	95%
Don't know	2%	2%

*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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OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2023	2024
No other states/provinces	77%	79%
Massachusetts	5%	4%
New Hampshire	6%	4%
New York	4%	4%
Vermont	5%	4%
Nova Scotia	4%	3%
New Brunswick	3%	2%
Quebec	2%	2%
Connecticut	2%	1%
Rhode Island	2%	1%
Newfoundland and Labrador	1%	1%
Ontario	1%	1%
Prince Edward Island	2%	1%
Other	4%	6%

*Multiple responses permitted.

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ADVERTISING/PROMOTIONS

Recalled Advertising	2023	2024
Yes	29%	27%
No	52%	59%
Not sure	19%	14%

Influenced by Advertising	2023	2024
Yes	12%	13%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recall*	2023	2024
Internet	36%	33%
Social media	36%	30%
Magazine	19%	20%
Cable or satellite television	19%	19%
Traveler reviews/blogs	10%	13%
VisitMaine.com	12%	11%
Newspaper	9%	11%
AAA	7%	10%
Radio	11%	9%
Maine travel/visitor guide	9%	8%
Online streaming service	7%	7%
Brochure	6%	6%
Music/podcast streaming	7%	3%
Billboard	2%	2%
Deal – based promotion	2%	1%
Other	5%	6%
Not sure	2%	5%

*Multiple responses permitted.

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Pre-Visit

Traveler Profile

Trip Experience

Post-Trip Evaluation

Impact of Tourism

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ORIGIN REGION

Region of Origin	2023	2024
Maine	18%	16%
New England	12%	12%
Mid-Atlantic	18%	20%
Southeast	20%	20%
Southwest	6%	5%
Midwest	9%	10%
West	6%	7%
Canada	8%	8%
International	3%	2%

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ORIGIN STATE/PROVINCE

Origin States & Provinces	2023	2024
Maine	18%	16%
Florida	8%	11%
New Brunswick	6%	6%
Massachusetts	6%	5%
New York	4%	5%
New Jersey	3%	4%
Pennsylvania	3%	4%
California	2%	3%
New Hampshire	3%	3%
North Carolina	4%	3%
Texas	5%	3%
Virginia	3%	3%

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ORIGIN MARKET

Origin Markets	2023	2024
New York City[1]	6%	6%
Washington DC - Baltimore[2]	5%	5%
Tampa - Clearwater - St. Petersburg	1%	3%
Boston	2%	2%
Philadelphia	2%	2%
Fredericton, CAN	2%	2%
Orlando	2%	2%
Chicago	1%	2%
Bangor	1%	2%
Miami - Ft. Lauderdale	2%	2%
Dallas - Ft. Worth	2%	2%

[1] Includes some markets in New Jersey, Pennsylvania, and Connecticut.
[2] Includes some markets in Maryland, Virginia, and West Virginia.

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TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2023	2024
As a couple	34%	36%
Traveled alone	27%	28%
As a family	23%	22%
With other couples/friends	11%	11%
With business associates	4%	3%
In a tour group	<1%	<1%
Other	1%	<1%
Average Travel Party Size	2.7	2.6

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TRAVEL WITH CHILDREN*

Children in Travel Party*	2023	2024
No children	86%	87%
Children younger than 6	5%	4%
Children 6 – 12	6%	6%
Children 13 – 17	6%	5%

Gender	2023	2024
Male	53%	54%
Female	47%	46%
Other	NA	<1%

*Multiple responses permitted.

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DEMOGRAPHIC PROFILE

Age	2023	2024
Under 25	9%	7%
25 – 34	20%	19%
35 – 44	16%	20%
45 – 54	17%	15%
55 – 65	20%	18%
Over 65	18%	21%
Median Age	**48**	**48**

Race/Ethnicity	2023	2024
White	87%	90%
Black	4%	3%
Hispanic	3%	3%
Asian	4%	3%
Indigenous	1%	1%
Other	1%	<1%

LIFESTYLE PROFILE

Marital Status	2023	2024
Single/widowed	29%	31%
Married/living with partner	71%	69%

Employment Status	2023	2024
Employed full-time	61%	60%
Employed part-time	6%	5%
Contract/freelance/temporary employee	6%	5%
Retired	19%	23%
Not currently employed	4%	3%
Student	4%	4%

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LIFESTYLE PROFILE

Household Income	2023	2024
Less than $25,000	5%	5%
$25,000 - $49,999	10%	8%
$50,000 - $74,999	17%	16%
$75,000 - $99,999	16%	17%
$100,000 - $149,999	22%	25%
$150,000 - $199,999	14%	13%
$200,000 - $249,999	7%	6%
$250,000 or more	9%	10%
Median Household Income	$104,500	$108,000

LIFESTYLE PROFILE

Educational Attainment	2023	2024
High school or less	10%	10%
Some college or technical school	18%	16%
College or technical school graduate	44%	47%
Graduate school	28%	27%

NEW & RETURNING VISITORS

Previous Trips to Maine	2023	2024
This is my first time	25%	23%
2 - 5 times	24%	27%
6 - 10 times	11%	14%
11+ times	40%	36%

VISITOR JOURNEY : TRIP EXPERIENCE

Pre-Visit → Traveler Profile → **Trip Experience** → Post-Trip Evaluation → Impact of Tourism

TRANSPORTATION

Means of Transportation	2023	2024
Drove to Maine	78%	79%
Flew into Bangor Intl Airport	13%	10%
Flew into Portland Intl Jetport	4%	4%
Flew into Boston Logan Intl	2%	2%
Took a motor coach tour or bus	1%	2%
Flew into another airport	1%	1%
Other	1%	2%

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LENGTH OF STAY

Nights Stayed	2023	2024
Not staying overnight	16%	13%
1 night	8%	5%
2 nights	11%	10%
3 nights	11%	11%
4 nights	10%	13%
5+ nights	44%	48%
Average Length of Stay	**6.0**	**6.0**

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ACCOMMODATIONS

Accommodations	2023	2024
Hotel/motel/resort	29%	30%
Friends/family home	22%	22%
Not spending the night	16%	13%
Personal second home	10%	12%
Vacation rental home	9%	9%
Bed & Breakfast/Inn	4%	4%
Campground/RV Park	2%	3%
Wilderness camping	2%	2%
Sporting camp/wilderness lodge	2%	2%
Outdoor Outfitter	1%	<1%
Other	3%	3%

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BOOKING

Booking Methods	2023	2024
Directly with the hotel/condo	41%	39%
Online travel agency	23%	25%
Airbnb	12%	12%
Short term rental service	6%	4%
Vacation rental company	2%	2%
Travel package provider	1%	2%
Offline travel agent	3%	1%
Group tour operator	2%	1%
Other	10%	14%

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IN-MARKET RESOURCES*

In-Market Resources	2023	2024
Navigation website/apps	31%	34%
Restaurant website/app	13%	15%
Personal social media	13%	11%
Visitor Information Centers	10%	10%
Destination social media	8%	9%
Hotel/resort website/app	10%	8%
Materials from hotel/campground	8%	7%
Trip planning app	9%	6%
Airline website/app	6%	6%
VisitMaine.com	6%	5%
Booking website/app	7%	5%
Chambers of Commerce	2%	1%
Other	3%	4%
None	39%	40%

*Multiple responses permitted.

ACTIVITIES*

Activities	2023	2024
Food/beverage/culinary	63%	66%
Touring/sightseeing	45%	45%
Active outdoor activities	40%	41%
Shopping	39%	40%
Water activities	18%	20%
History/culture	15%	17%
Astrotourism	11%	9%
Business conference/meeting	6%	7%
Entertainment/attractions	6%	5%
April 8th, 2024 Solar Eclipse	NA	<1%
Other	7%	6%

*Multiple responses permitted.

DETAILED VISITOR ACTIVITIES*

Activity	%	Activity	%	Activity	%
Going to local brew pubs/craft breweries	31%	Motor boating	9%	Mountain/Fat Biking	2%
Sightseeing	31%	Fishing	8%	Attend popular music concerts/events	2%
Hiking/climbing/backpacking	28%	Shopping in downtown areas	8%	Alpine skiing/snowboarding	2%
Enjoying the mountain views	26%	Shopping for unique/locally produced goods	8%	Snowshoeing	2%
Enjoying the ocean views/rocky coast	24%	Viewing fall colors	7%	Painting/drawing/sketching	2%
Ate lobster	23%	Visit art museums/local artisan studios	7%	Water skiing/jet skiing	1%
Ate other local seafood	21%	Get to know the local people and/or culture	6%	White water rafting	1%
Driving for pleasure	19%	Shopping for antiques/local arts and crafts	6%	Nordic skiing	1%
Consumed other locally produced Maine foods	16%	Tours of communities/local architecture	6%	Sailing	1%
Exploring State and National Parks	16%	Enjoying local food at fairs/festivals	6%	Amusement/theme parks	1%
Shopping at malls	15%	Going to the beach	5%	Pool swimming	1%
Enjoyed unique Maine food or beverages	15%	Shopping for "Made in Maine" products	5%	Children's museums	1%
Shopping for gifts/souvenirs	15%	Camping	6%	Agricultural fairs	<1%
Outlet shopping	13%	Riding all-terrain vehicles	7%	Attend sporting events	<1%
Photography	13%	Enjoyed high-end cuisine or five-star dining	4%	Outdoor fun centers	<1%
Wildlife viewing/bird watching	13%	Hunting	4%	Water parks	<1%
Visit historic sites/museums	12%	Ate farm-to-table or organic cuisine	3%	Animal parks/zoos	<1%
Outdoor swimming	9%	Snowmobiling	3%	Surfing	<1%
Visited Farmer's Markets	8%	Bicycling touring	3%	Attend operas/classical music events	<1%
Nature cruises or tours	9%	Bars/nightlife	2%	Horseback riding	<1%
Canoeing/kayaking	9%	Attend plays/musicals/theatrical events	2%	Summer camps	<1%

*Multiple responses permitted.

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OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2023	2024
No other states/provinces	77%	80%
New Hampshire	8%	6%
Massachusetts	6%	4%
New York	5%	4%
Vermont	3%	3%
New Brunswick	5%	3%
Connecticut	2%	2%
Nova Scotia	2%	2%
Rhode Island	2%	1%
Quebec	1%	1%
Ontario	1%	1%
Prince Edward Island	2%	1%
Newfoundland and Labrador	<1%	<1%
Other	4%	5%

*Multiple responses permitted.

TRAVELING IN MAINE*

Maine Regions Visited	2023	2024
No other regions	44%	46%
Downeast & Acadia	36%	36%
Midcoast & Islands	13%	13%
Greater Portland & Casco Bay	12%	8%
The Maine Beaches	8%	7%
Kennebec Valley	7%	6%
Aroostook County	5%	5%
Maine Lakes & Mountains	6%	4%
Other	1%	1%

*Multiple responses permitted.

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VISITOR JOURNEY : POST-TRIP EVALUATION

Pre-Visit

Traveler Profile

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RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2023	2024
Would recommend Maine	96%	96%
Would not recommend Maine	1%	1%
Not sure	4%	3%

Recommending Regions	2023	2024
Definitely recommend region	75%	74%
Probably would recommend region	12%	17%
Would not recommend region	1%	1%
Not sure	12%	8%

RETURNING TO MAINE

Returning to Maine	2023	2024
Definitely will return	78%	78%
Probably will return	17%	17%
Probably will not return	1%	1%
Not sure	4%	4%

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SATISFACTION

Satisfaction	2023	2024
Very satisfied	79%	80%
Satisfied	19%	17%
Dissatisfied	<1%	1%
Don't know	2%	2%

TRIP EXPECTATIONS

Exceeded Expectations	2023	2024
Friendliness of people	62%	54%
Activities & attractions	54%	46%
Authentic & unique communities	49%	41%
Customer service	47%	41%
Restaurants	43%	35%
Lodging	41%	30%
Value for your money	37%	28%
Shopping	35%	26%

OVERCROWDING

Overcrowding	2023	2024
Overcrowded	2%	2%
A little overcrowded	12%	12%
The number of visitors was fine	48%	46%
Not at all overcrowded	37%	38%
Other	1%	2%

STUDY METHODS

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METHODOLOGY

Visitor Tracking

658 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, 2023 and November 30th, 2024.

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 1.58.

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MAINE HIGHLANDS

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

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