

MAINE OFFICE OF TOURISM

2023 Winter Visitor Tracking Report

DECEMBER 2022 – APRIL 2023



INTRODUCTION



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Maine from December 2022 to April 2023.

In the report, we follow the visitors in their journeys from pre-trip planning to the impact of their expenditures in the state. Along the way, we examine profiles of visitors, their experiences in our destination, and how they evaluate experiences in Maine.



SEASONAL SNAPSHOT

WINTER 2023

- » In Winter 2023, visitors had a shorter length of stay and there was a higher occupancy, resulting in an increase in overall visitors compared to Winter 2022.
- » **59%** of visitors noticed advertisements/travel stories/promotions about Maine prior to their trip (+13% points from 2022)
- » Winter visitors were more likely to use social media to plan their trip, recall in advertising, and while in market
- » **15%** of visitors used an online travel agency to help plan their trip to Maine (+6% points from 2022)
- » **40%** of visitors were primarily come to Maine to visit friends and family (+6% points from 2022)
- » Compared to Winter 2022, more visitors went to other states while on their trip to Maine (+5% points from 2022) which may have resulted in a shorter length of stay



3,996,100

TOTAL
VISITORS

+ 15.3%



17,122,700

VISITOR
DAYS

+ 0.1%



\$1,961,443,400

DIRECT
SPENDING

+ 15.7%

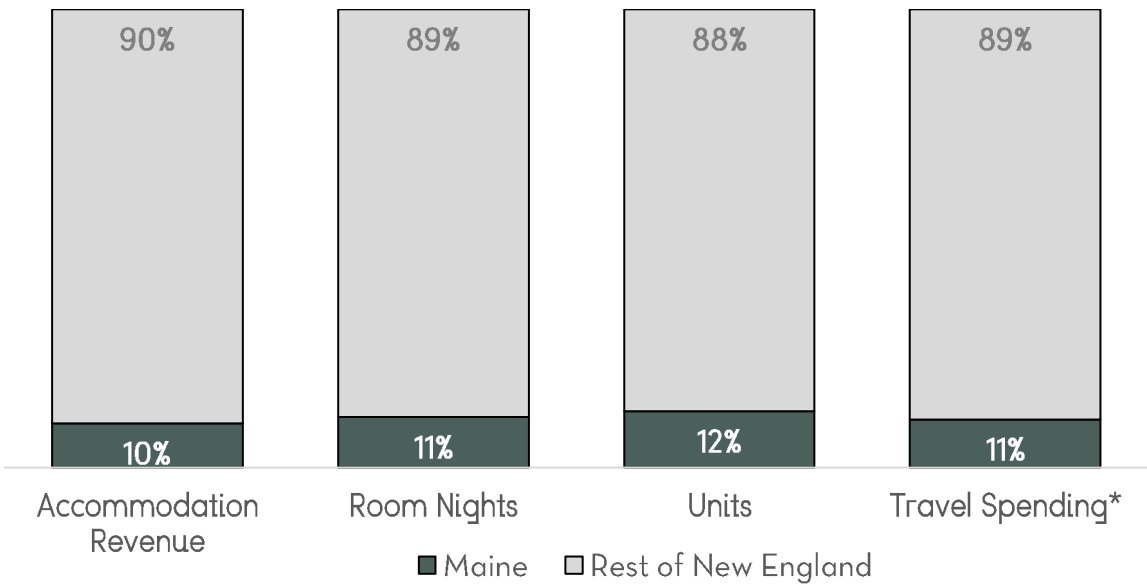
vs. 2022

EXECUTIVE SUMMARY



MARKET SHARE & HOTEL METRIC COMPARISONS

- » **Maine’s market share in New England** when it comes to accommodation revenue, room nights, units, and travel spending **ranges between 10%-12%.**
- » The consistency in the market share across multiple variables reinforces confidence in Maine’s overall market share in New England.
- » Compared to the New England region, hotel occupancy in Maine was **-10%** lower and hotel room rates were **-13%** lower, resulting in RevPAR that was **-22%** lower than the rest of the region.



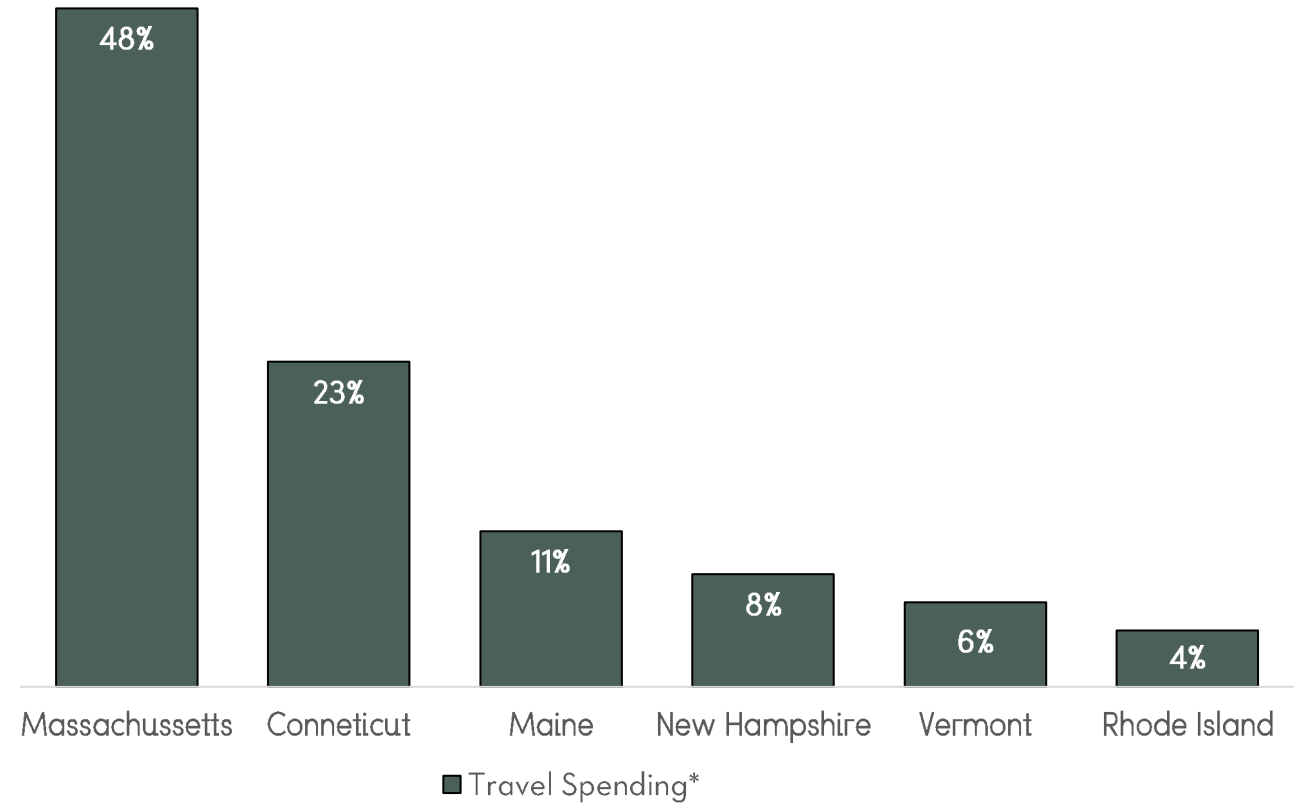
| Hotel Metrics** | Maine | New England | Δ% from NE |
|--------------------|----------|-------------|------------|
| Occupancy Rate (%) | 49.2% | 54.4% | - 10% |
| Average Daily Rate | \$132.09 | \$152.48 | - 13% |
| RevPAR | \$65.04 | \$82.92 | - 22% |

*Source: US Travel Association.

**Source: Smith Travel Research.

MARKET SHARE BY STATE

- » Travel spending in Maine accounted for 11% of all visitor spending in the New England region.
- » Among New England states, Winter 2023 travel spending in Maine was only surpassed by Massachusetts and Connecticut.



*Source: US Travel Association.

TRIP PLANNING CYCLE : IMPACT OF TOURISM



KEY PERFORMANCE INDICATORS

In Winter 2023, visitors had a shorter length of stay, more rental units available, and there was a higher occupancy, resulting in an increase in overall visitors compared to Winter 2022. Additionally, the overall number of days spent by visitors in Maine and direct spending increased.

| KPIs | 2022 | 2023 | Δ% from '22 |
|---------------------------|-----------------|-----------------|-------------|
| Visitors (#) | 3,465,100 | 3,996,100 | + 15.3% |
| Visitor Days ¹ | 17,110,800 | 17,122,700 | + 0.1% |
| Direct Spending | \$1,695,521,600 | \$1,961,443,400 | + 15.7% |
| Room Nights | 3,056,200 | 3,497,700 | + 14.4% |

¹ Visitor Days is the total number of days spent by visitors in the state of Maine. This include overnight visitors and day trippers.

VISITATION METRICS

| Visitation ¹ | Maine Residents | Out-of-State Visitors | Total |
|-------------------------|-----------------|-----------------------|-----------|
| Visitor (#) | 1,198,800 | 2,797,300 | 3,996,100 |
| Visitor (%) | 30% | 70% | 100% |

¹ Visitation estimates provided here are **preliminary** and reflect visitation from December 2022 – April 2023. Adjustments will be made to these estimates at the end of the year to account for seasonal fluctuations.

LODGING METRICS

Occupancy Rate

39.7%

+ 1.0% from 2022

Average Daily Rate

\$154.60

- 8.9% from 2022

Revenue per Available Room

\$61.39

- 8.0% from 2022

TRIP PLANNING CYCLE : PRE-VISIT



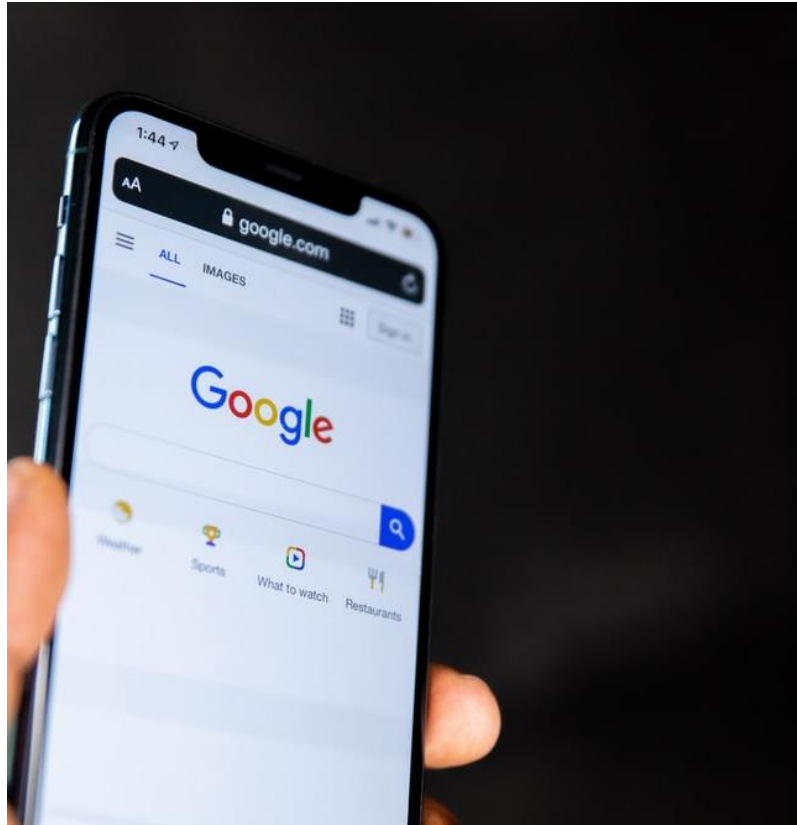
TRIP PLANNING CYCLE

- » **58%** of visitors started planning their trip a month or more in advance of their trip
- » Typical trip planning cycle began **37 days** before the trip (35 days in 2022)
- » **86%** of visitors have a booking window of less than 3 months
- » Typical booking cycle began **21 days** before the trip (20 in 2022)



TOP ONLINE TRIP PLANNING SOURCES*

7 in 10 visitors used one or more online resources to help them plan their trip in Maine



33% Online search engines



21% Facebook



20% Hotel websites

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



47% Advice from friends/family



21% Articles or travelogues

*Multiple responses permitted.

TOP REASONS FOR VISITING*



40% Visiting friends/family



22% Relax and unwind



19% Shopping

*Multiple responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » Over **3 in 5** visitors considered visiting **only** Maine while planning their trips (-9% points from 2022)
- » As other destinations and international borders opened up for visitation, potential visitors now have many more destination options to choose from



TV SHOWS & FILM*

- » **8%** of visitors said a TV show or film inspired their trip to Maine
- » **65%** of visitors who were inspired by a TV show or film said they visited a location of a TV show or film



*Questions were not asked until January 2023.

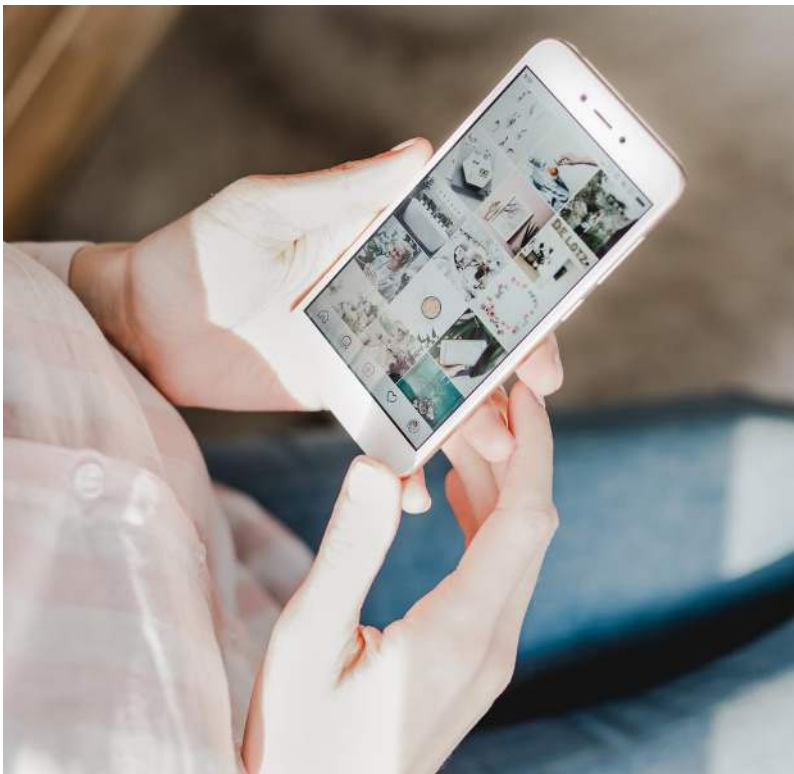
PRE-TRIP EXPOSURE TO ADVERTISING

- » **59%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip (+13% points from 2022)
- » This information influenced **35%** of all visitors to visit Maine



TOP SOURCES OF ADVERTISING EXPOSURE*

Base: 59% of visitors who noticed advertising



57% Social media



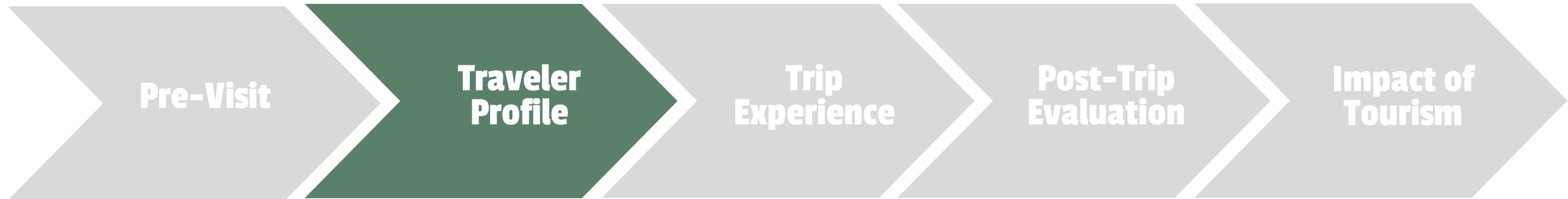
36% Internet



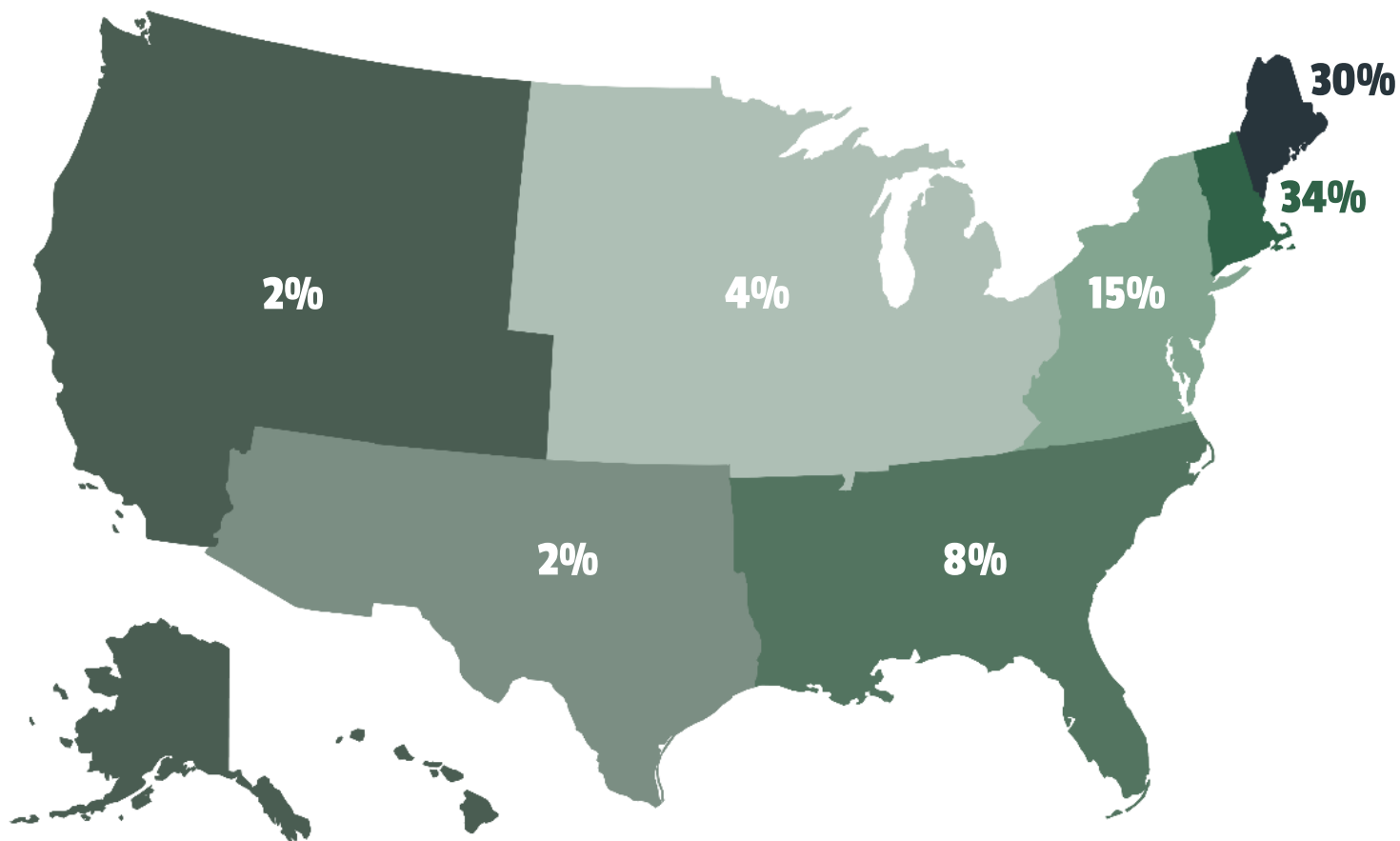
27% Magazine

*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



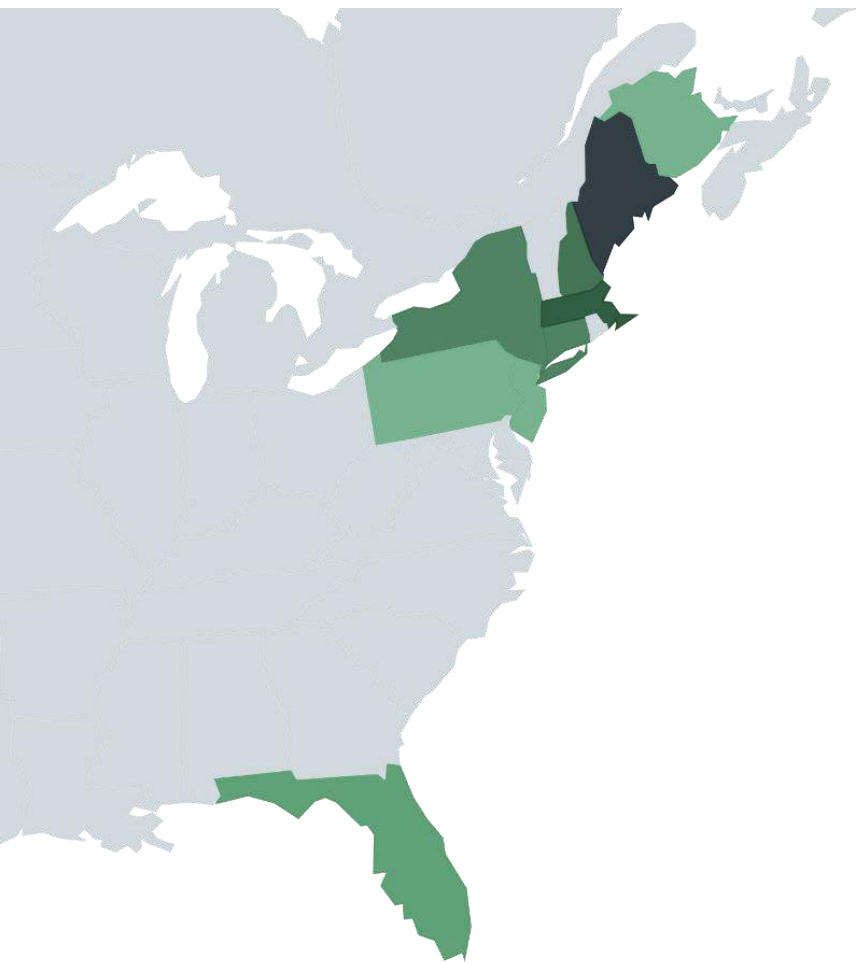
REGIONS OF ORIGIN



1% of visitors came from outside of the United States and Canada.

4% of visitors came Canada.

TOP ORIGIN STATES & PROVINCES



88%

of visitors traveled from **14** U.S. states and Canadian provinces, including from other regions of Maine.

- | | | |
|---------------------------|-------------------------|--------------------------|
| 30 % Maine | 5 % Connecticut | 3 % New Brunswick |
| 16 % Massachusetts | 4 % Florida | |
| 9 % New Hampshire | 3 % New Jersey | |
| 5 % New York | 3 % Pennsylvania | |

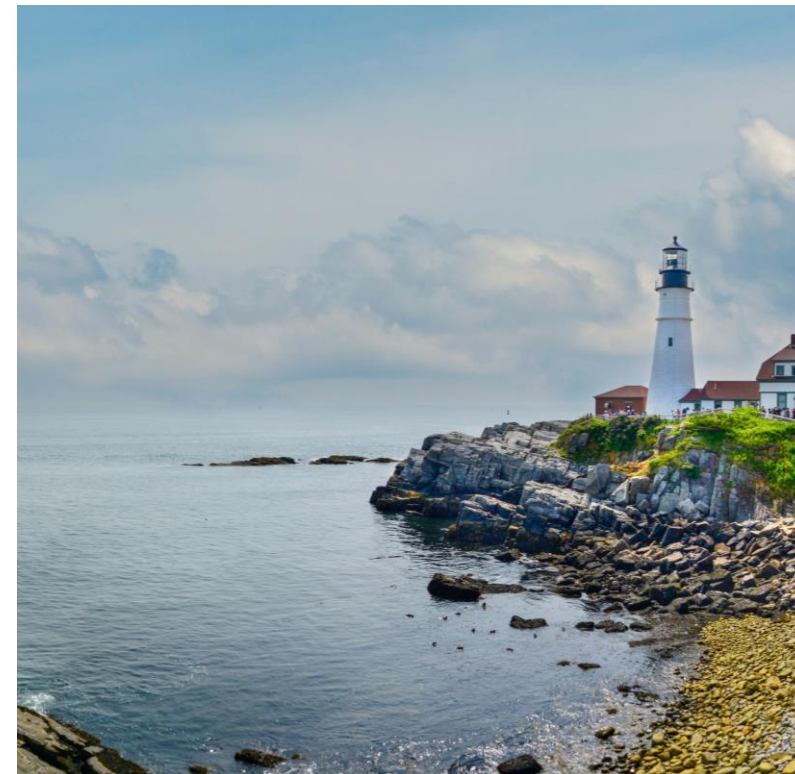
TOP ORIGIN MARKETS



10% Boston



6% New York City¹



4% Portland, ME

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

TRAVEL PARTIES

The typical Maine visitor traveled with **2.4** people in their visitor party



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



DEMOGRAPHIC PROFILE

» The typical Maine visitor:

- » Is **49** years old¹
- » Female² - **57%**
- » Is white - **89%**



¹Median age.

²Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Maine visitor:
 - » Is a college graduate - **75%**
 - » Is married/in a domestic partnership - **74%**
 - » Is employed full-time - **52%**
 - » Has an annual household income¹ of **\$82,000**



¹Median household income.

NEW & RETURNING VISITORS

- » **11%** of visitors were traveling in Maine for the first time
- » **35%** of visitors had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **90%** of visitors drove to their Maine destination
- » **4%** of visitors flew to Maine through Portland International Jetport



NIGHTS STAYED

- » **86%** of visitors spent one or more nights in Maine (-4% points from 2022)
- » Typical visitors stayed **4.3*** nights in Maine on their trip



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

TOP ACCOMMODATIONS



31% Hotel/motel/resort



25% Friends/family home



14% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*

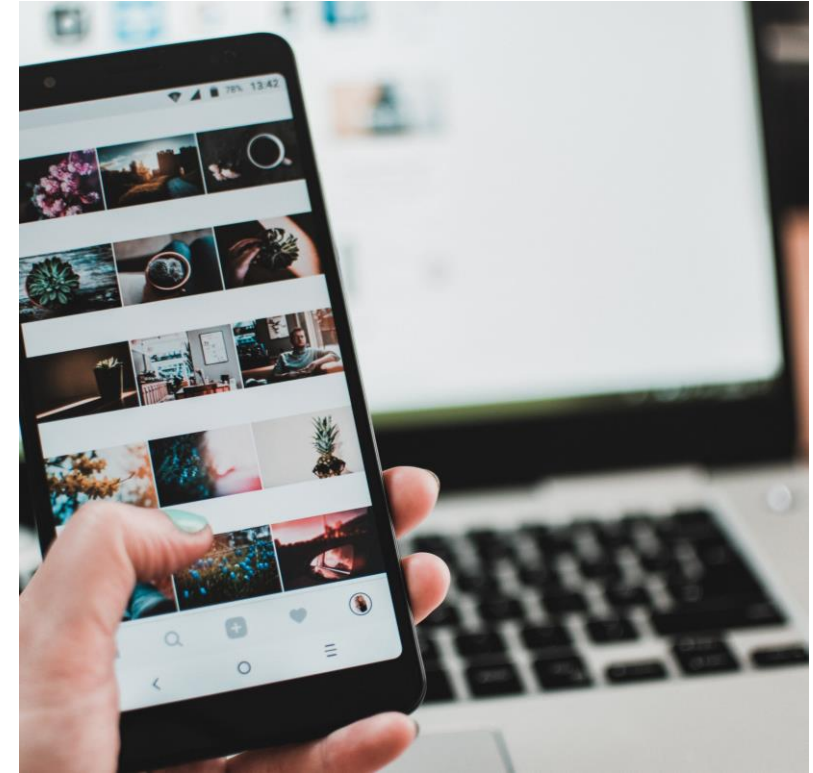
Over **3 in 4** visitors used one or more in-market resources to help them plan places to go while in Maine



41% Restaurant website/app



39% Navigation websites/apps



29% Personal social media

*Multiple responses permitted.

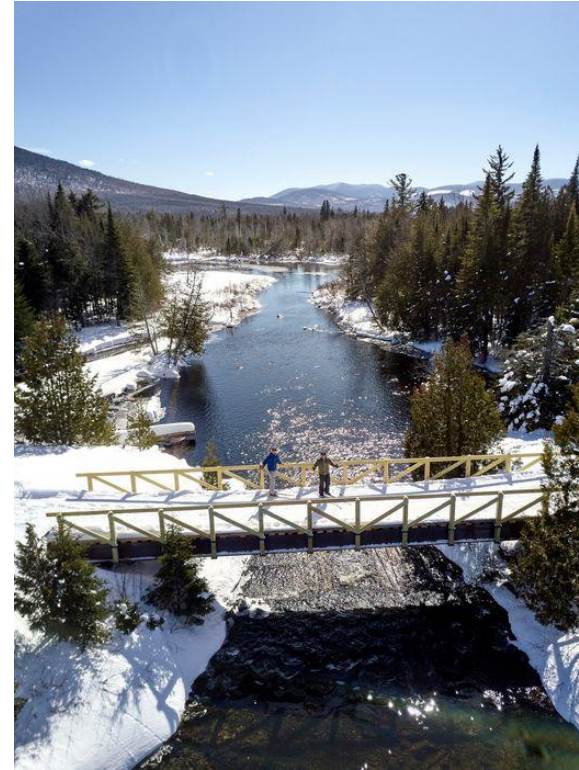
TOP VISITOR ACTIVITIES*



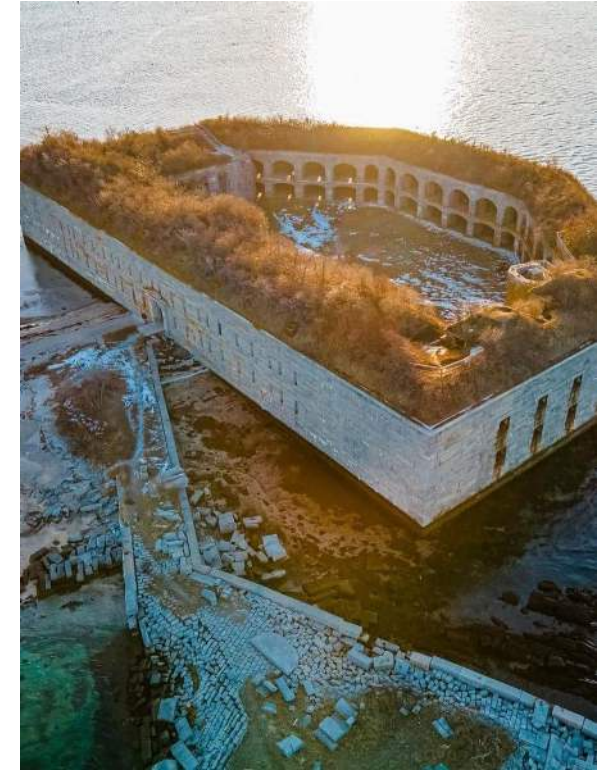
75% Food/beverage/
culinary



50% Shopping



41% Active outdoor
activities



35% Touring/sightseeing

*Multiple responses permitted.

TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in Maine spent **\$482** per day and **\$2,025** during their trip
- » Visitors who stayed overnight in unpaid accommodations in Maine spent **\$234** per day and **\$1,358** during their trip
- » Visitors who did not stay overnight in Maine spent **\$194** during their trip



VISITING OTHER STATES & PROVINCES

- » Over **7 in 10** visitors did not visit any other U.S. state or Canadian province on their trip to Maine (-5% points from 2022)
- » 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

» Over **half** of visitors traveled to regions other than their primary destination during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



TOP UNIQUE DESTINATION ATTRIBUTES*



“Relaxation in a state that demands letting go of the rat race. Peaceful and beautiful.”

“Sweet escape from the city madness. Good fresh food. Clean and beautiful environment.”

“There are so many different areas to visit. You can be at the lighthouses on the ocean in the morning and then travel for a few hours and be in the mountains watching the sunset.”

“Welcoming and friendly people, a relaxing environment, numerous activities, great natural landmarks, and great seafood.”

*Coded open-ended responses.
Multiple responses permitted.

TOP TRIP HIGHLIGHTS*



“Spending time with family. Board games by the wood stove by candlelight.”

“The highlight of my trip was the driving part because, being a passenger, I got to see the sights as we were going to Bar Harbor.”

“Came up here for sled run at my old club, and because we don't have enough snow, Washburn and Mapleton have the best trails, and we rent the same house every other weekend. The warming hut they just built is amazing and very central to our runs.”

“Spending time with my mom and sister while relaxing and eating great food was the highlight of my trip because we never get to do that. We haven't spent time together like that in several years, and I honestly can't remember the last time we did. We had a really good time we had good food and we laughed a lot.”

*Coded open-ended responses.
Multiple responses permitted.

RECOMMENDING MAINE & ITS REGIONS

- » **97%** of visitors would recommend Maine to a friend or relative as a vacation destination
- » **98%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip
 - » **64%** would definitely recommend



LIKELIHOOD OF RETURNING TO MAINE

- » **95%** of visitors will return to Maine for a future visit or vacation
- » **72%** of visitors will “definitely return” in the future



SATISFACTION

- » **99%** of visitors were satisfied with their trip to Maine
- » However, inflation and the continued lack of work force negatively affected 2023 visitors' trip experiences: **15%** of visitors said that the customer service did not meet their expectations and **10%** said the restaurants did not meet their expectations



OVERCROWDING

- » **65%** of visitors thought the number of visitors during their trip to Maine was fine
- » **20%** of visitors thought it was not at all overcrowded
- » Only **13%** of visitors thought it was a little overcrowded



TOP PERCEPTIONS OF MAINE*



“Very happy to finally discover the Pine Tree State. Extraordinary natural beauty. Vast expanses without urban scenes. Treat to eat fresh seafood. The craft brew and oysters were excellent. The Gardens are spectacular.”

“Very rural, and I was disappointed in the restaurant or lack of the only one in this town closes way to early, but all that is worth it if you love to be outside riding, and I really enjoy meeting folks from Canada on the trails and pitstops.”

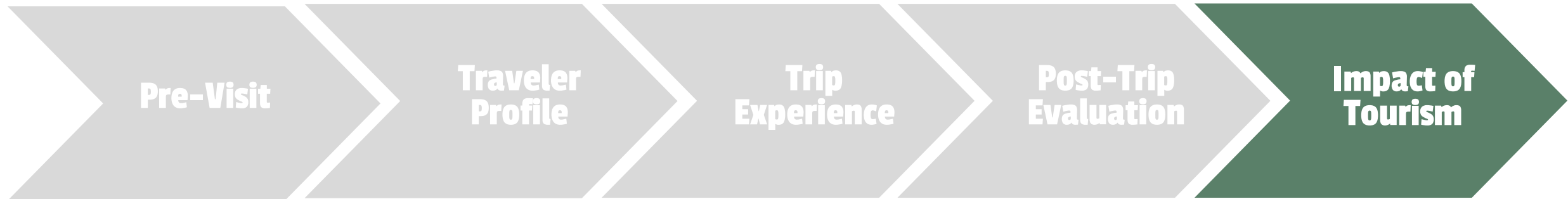
“We decided to forgo our traditional small town holiday events and see how other towns did it up. Was not disappointed. Heart warming small town moments in little towns along the coast. Proof that you can live in Maine and still vacation in Maine.”

*Coded open-ended responses.
Multiple responses permitted.

DETAILED FINDINGS



TRIP PLANNING CYCLE : PRE-VISIT



KEY PERFORMANCE INDICATORS

In Winter 2023, visitors had a shorter length of stay, more available rental units, and there was a higher occupancy, resulting in an increase in overall visitors compared to Winter 2022. Additionally, the overall number of days spent by visitors in Maine and direct spending increased.

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¹ Visitor Days is the total number of days spent by visitors in the state of Maine. This include overnight visitors and day trippers.

VISITATION METRICS

| Visitation ¹ | Maine Residents | Out-of-State Visitors | Total |
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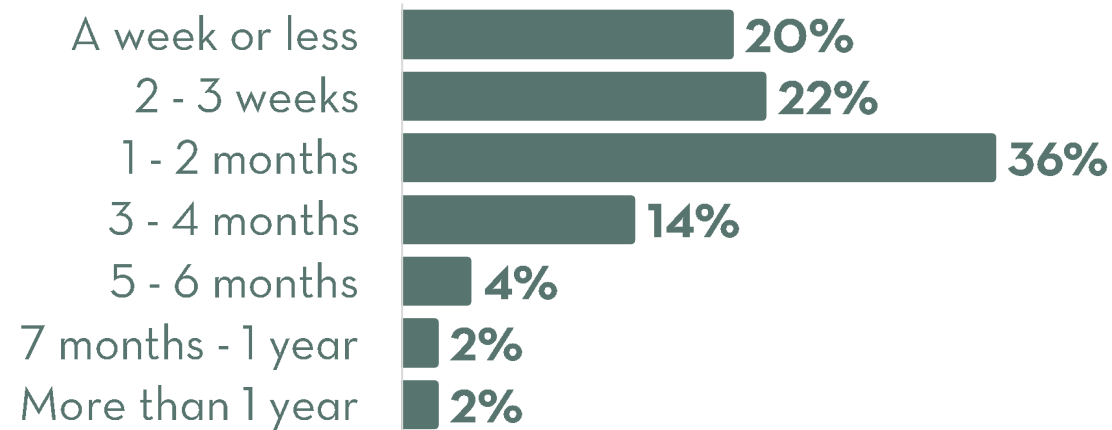
TRIP PLANNING CYCLE : PRE-VISIT



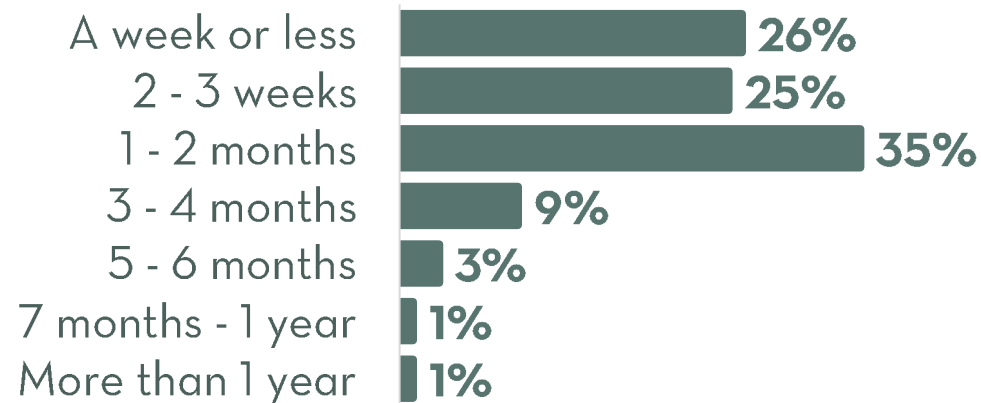
TRIP PLANNING CYCLE

- » Typical visitors began planning their trip **37 days** in advance (+2 days from 2022)
- » **58%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **21 days** in advance (+1 day from 2022)
- » **86%** of visitors have a booking window of less than 3 months

Beginning of Trip Cycle

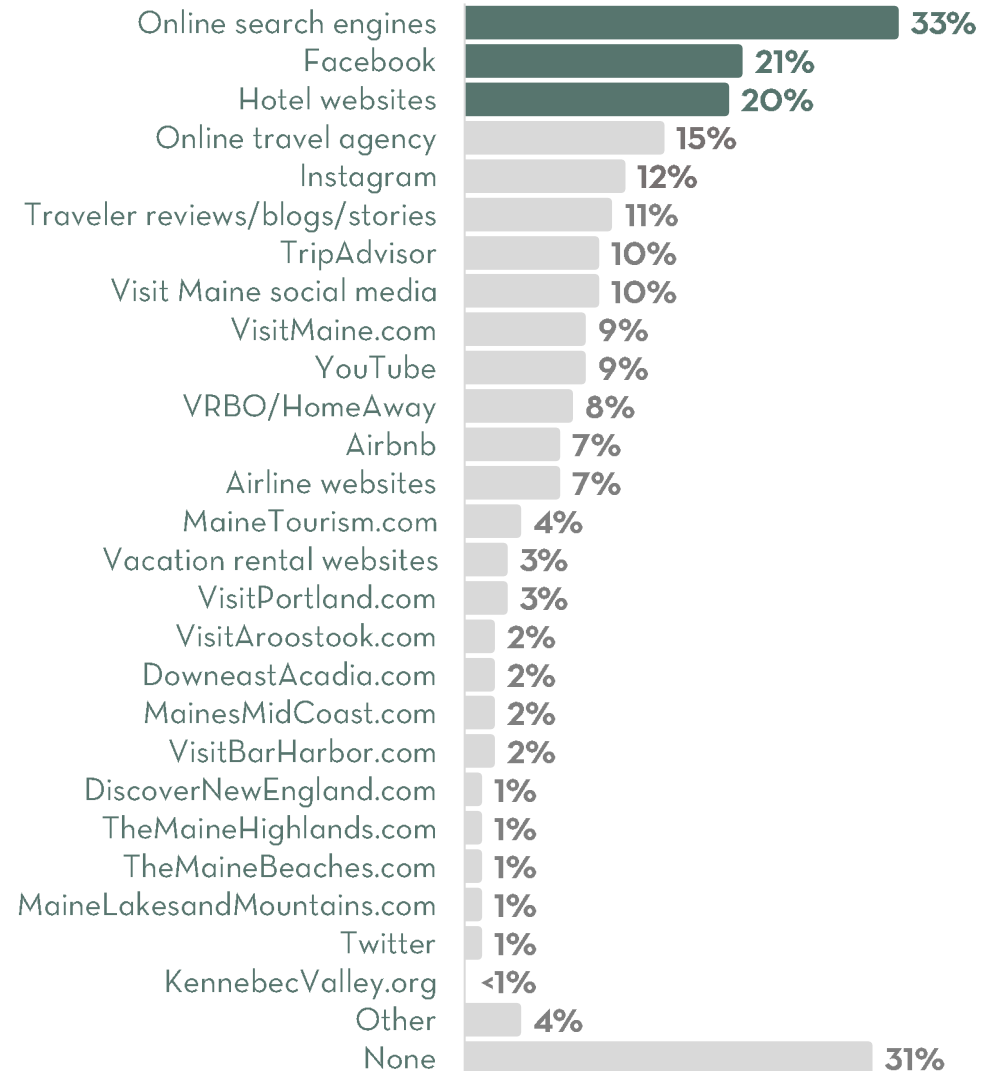


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

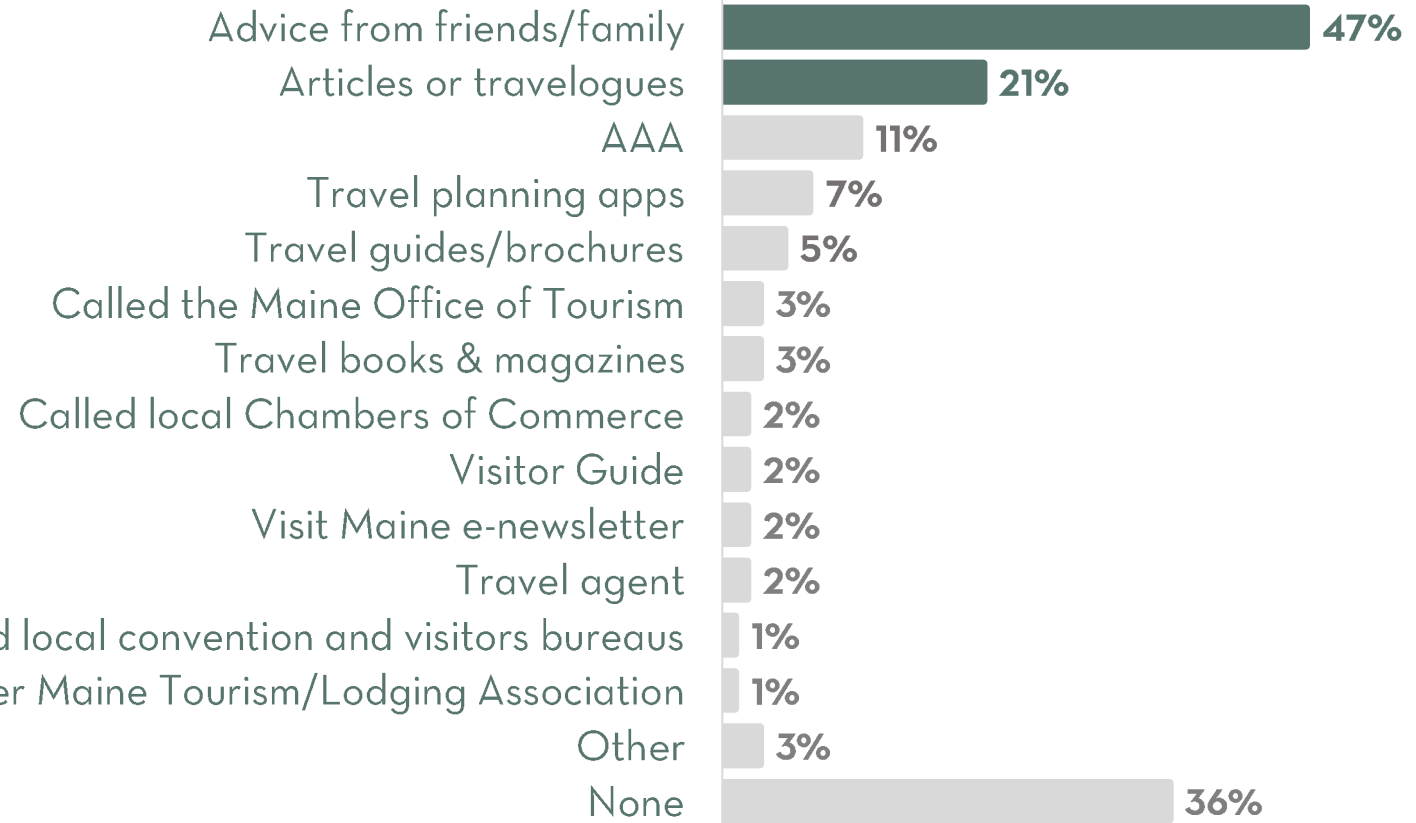
- » **7 in 10** visitors used one or more online resources to help them plan their trip in Maine
- » **1 in 3** visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » About **1 in 5** visitors used Facebook (+13% points from 2022) and hotel websites
- » **1 in 10** visitors used VisitMaine.com



*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

- » Nearly **half** of visitors relied on advice from their friends and family to help them plan their trip in Maine (+11% points from 2022)
- » **1 in 5** visitors used articles or travelogues to help plan their trip in Maine (+6% points from 2022)
- » Nearly **2 in 5** visitors did not use any other resources to help them plan their trip in Maine



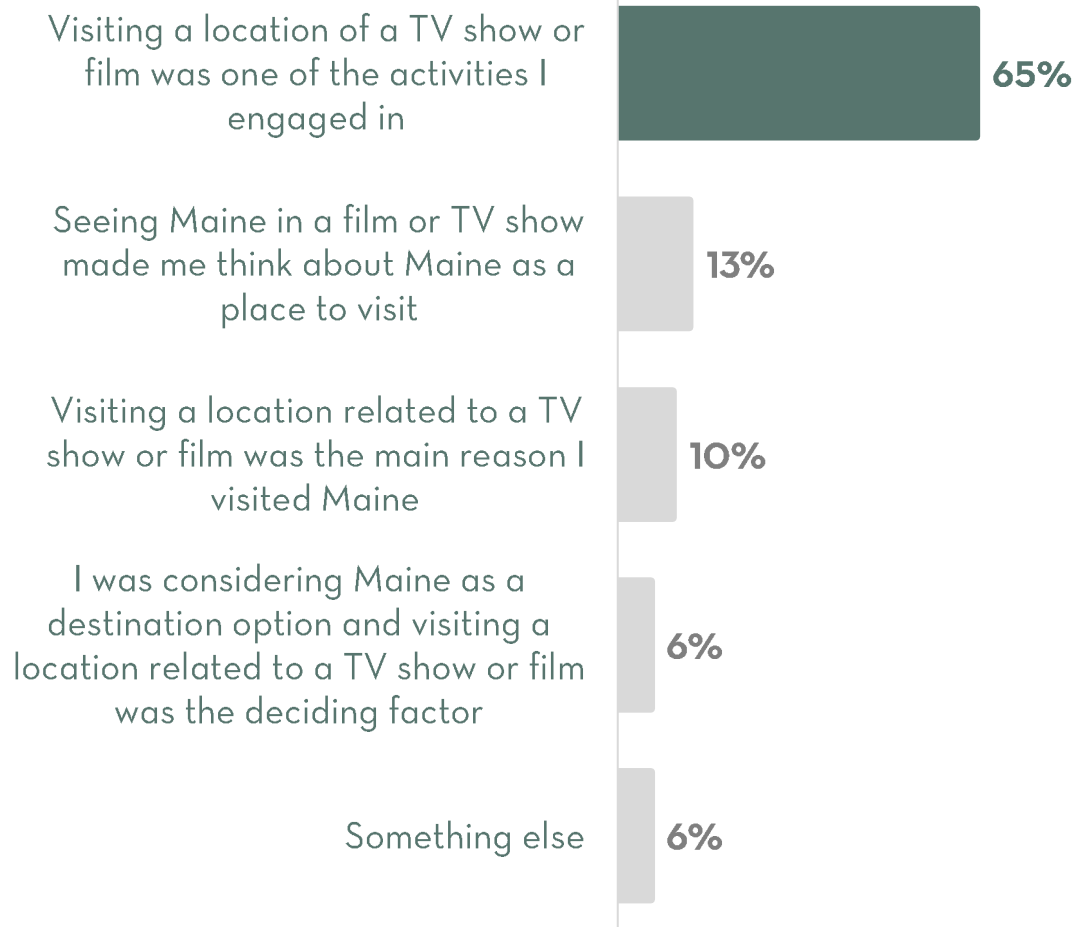
REASONS FOR VISITING*

- » **2 in 5** visitors came to Maine to visit friends and family (+6% points from 2022)
- » Nearly **1 in 4** visitors came to Maine to relax and unwind
- » Nearly **1 in 5** visitors came to Maine to shop



TV SHOWS & FILM*

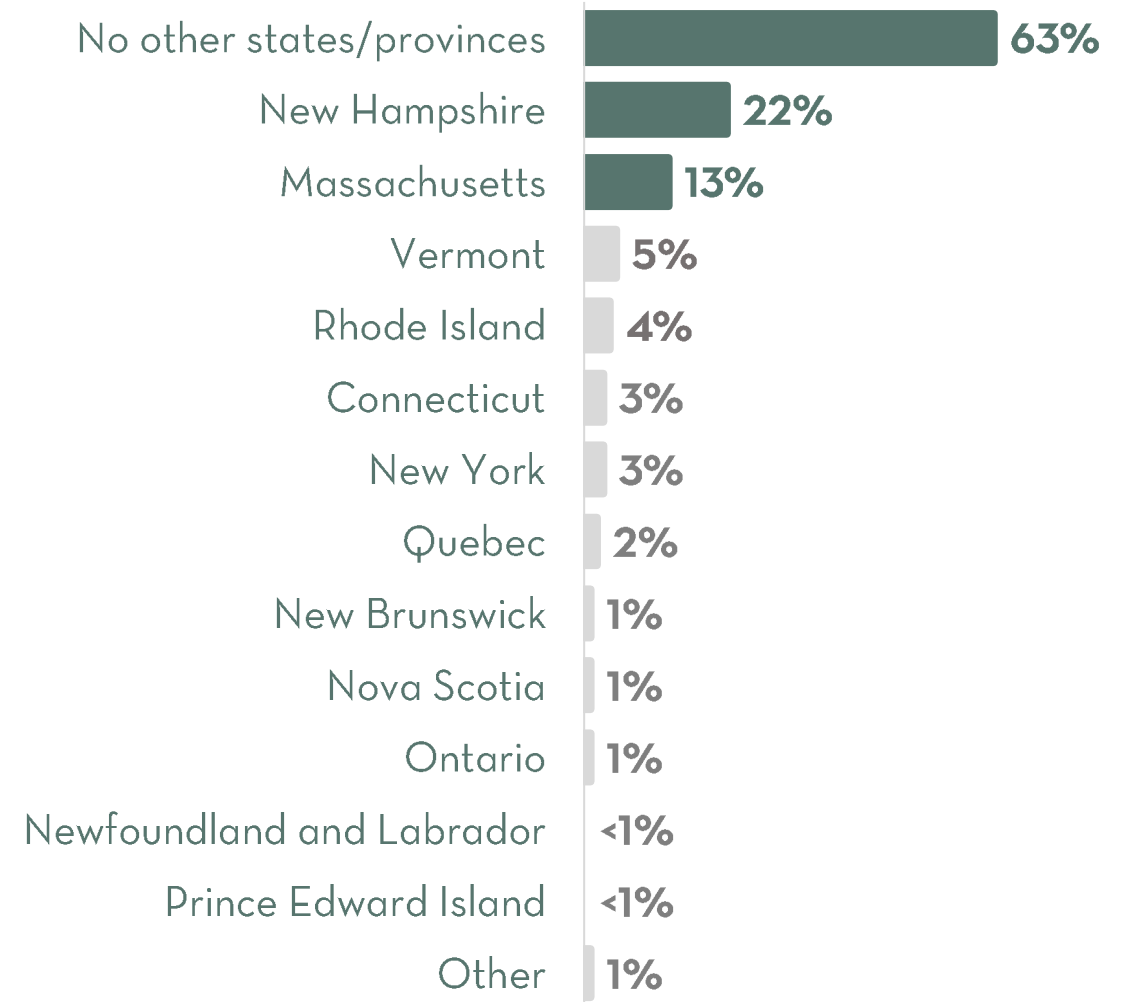
- » **8%** of visitors said a TV show or film inspired their tip to Maine
- » **65%** of visitors who were inspired by a TV show or film said they visited a location of a TV show or film
- » **4%** of visitors who were NOT inspired by a TV show or film to visit Maine said they visited the location of a TV show or film while in Maine



*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

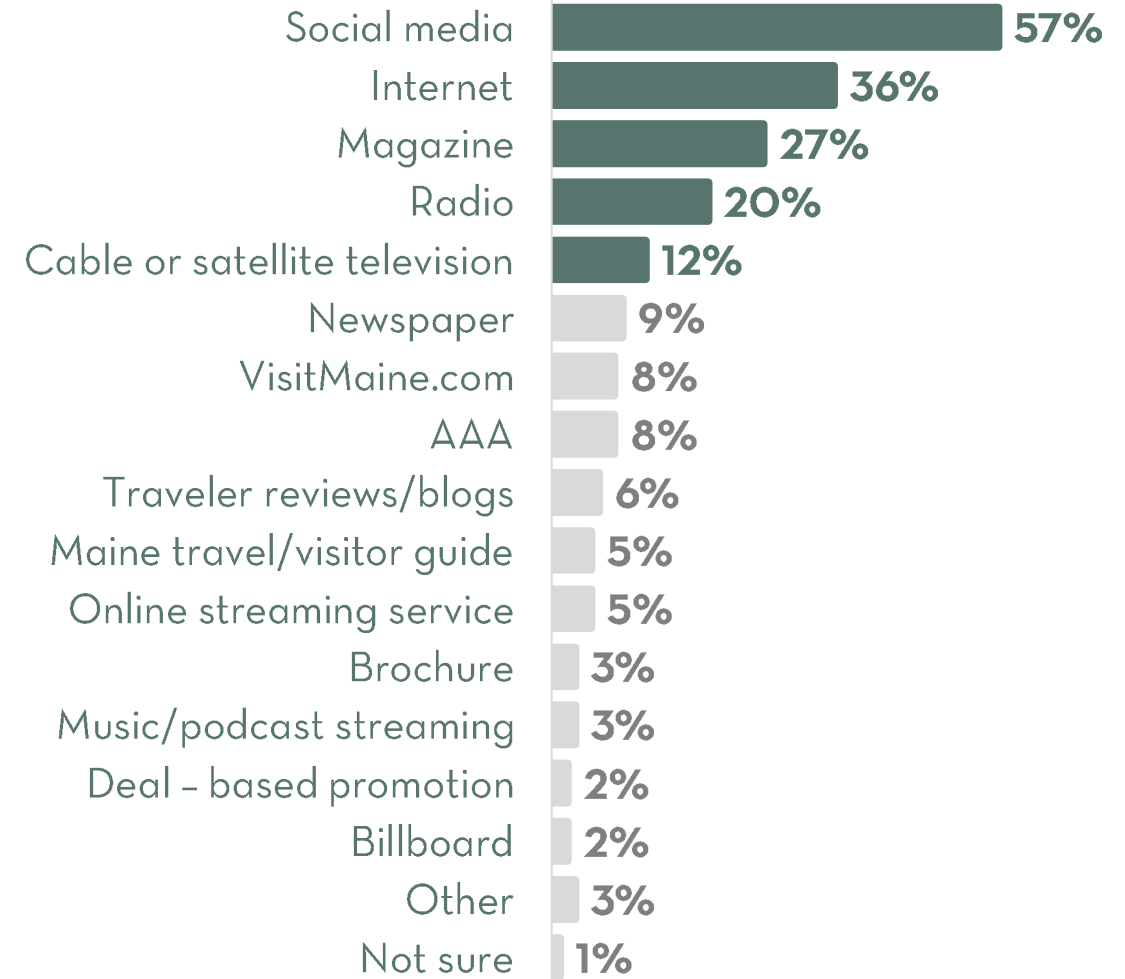
- » Over **3 in 5** visitors considered visiting **only** Maine while planning their trips (-9% points from 2022)
- » Visitors continued to be **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

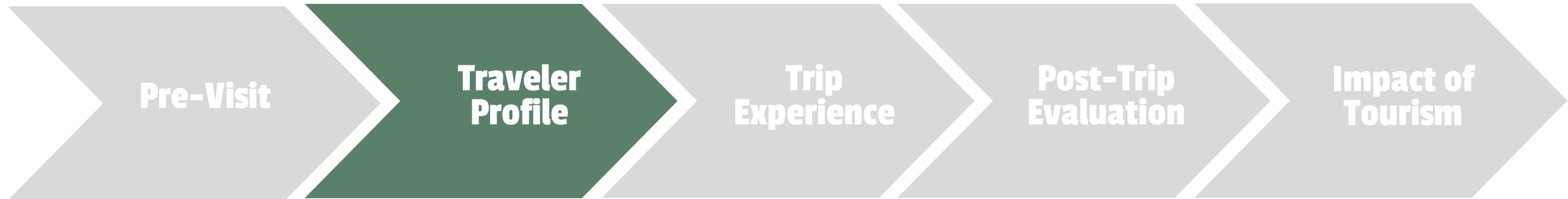
- » **3 in 5** visitors noticed advertising or promotions for Maine prior to their trip (+13% points from 2022)
- » Visitors who recalled this advertising primarily saw it on **social media** (+18% points from 2022) or the **internet** (+5% points from 2022)
- » This information influenced **35%** of all visitors to visit Maine

Base: 59% of visitors who noticed advertising

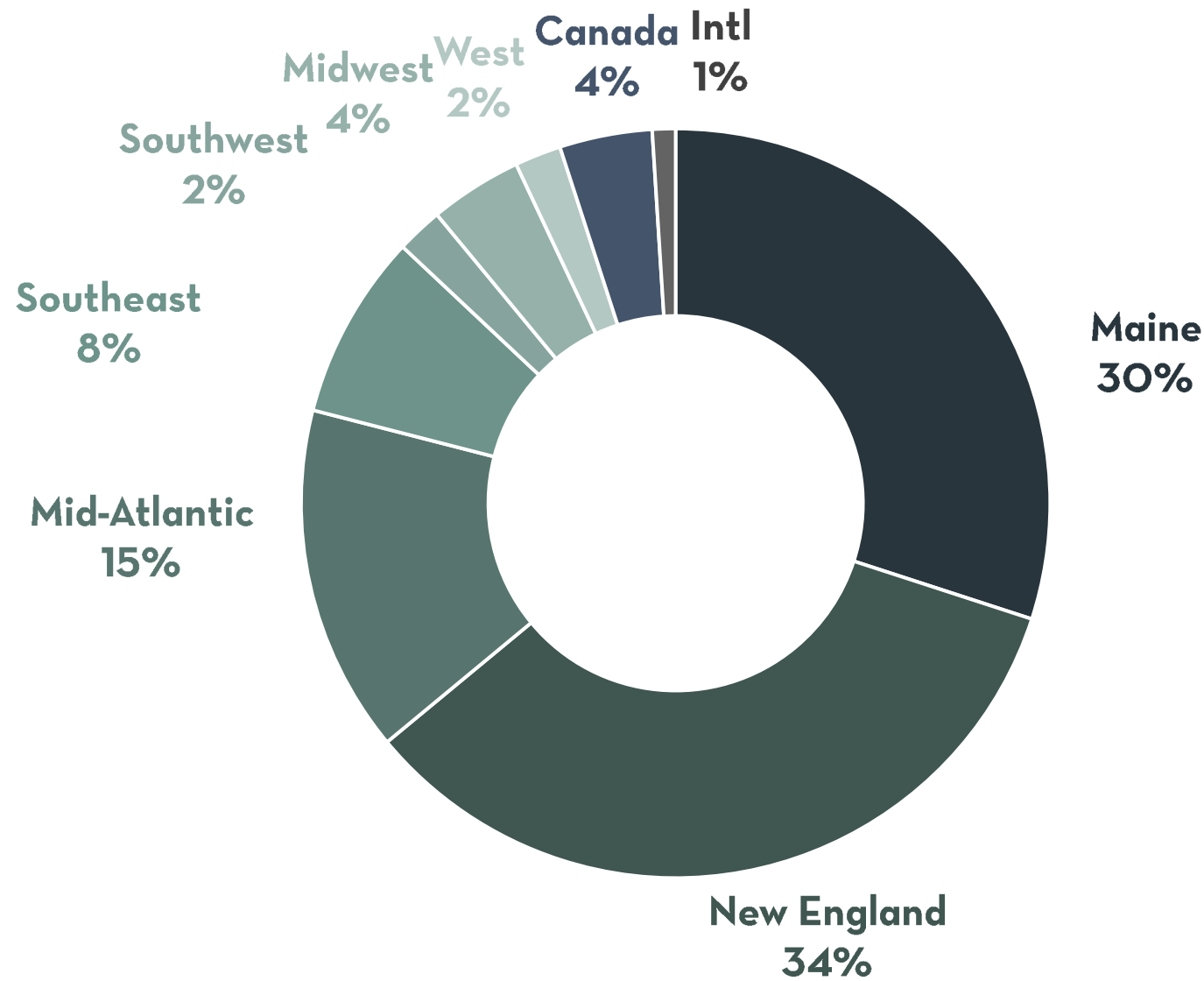


*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **88%** of visitors traveled to/within Maine from 14 U.S. states and Canadian provinces
- » **3 in 10** visitors were residents of Maine traveling throughout the state (+11% points from 2022)

| State | Percent |
|----------------|---------|
| Maine | 30% |
| Massachusetts | 16% |
| New Hampshire | 9% |
| Connecticut | 5% |
| New York | 5% |
| Florida | 4% |
| New Jersey | 3% |
| Pennsylvania | 3% |
| New Brunswick | 3% |
| Rhode Island | 2% |
| Vermont | 2% |
| Virginia | 2% |
| Maryland | 2% |
| North Carolina | 2% |

TOP ORIGIN MARKETS

- » **2 in 5** visitors traveled from **12** U.S. markets
- » **16%** of visitors traveled to Maine from Boston or New York City

| Market | Percent |
|--|---------|
| Boston | 10% |
| New York City ¹ | 6% |
| Portland, ME | 4% |
| Washington DC - Baltimore ² | 3% |
| Waterville | 2% |
| Bangor | 2% |
| Augusta | 2% |
| Auburn - Lewiston | 2% |
| Rochester - Portsmouth, NH | 2% |
| Providence, RI | 2% |
| Belfast | 2% |
| Philadelphia | 2% |

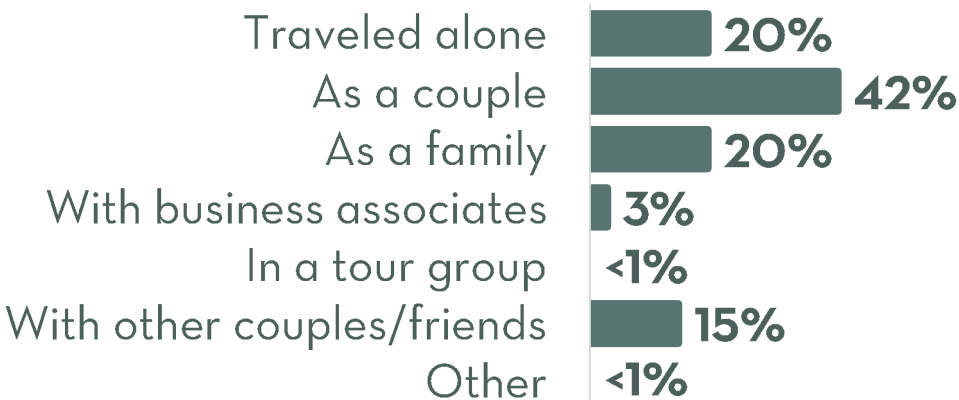
¹ Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

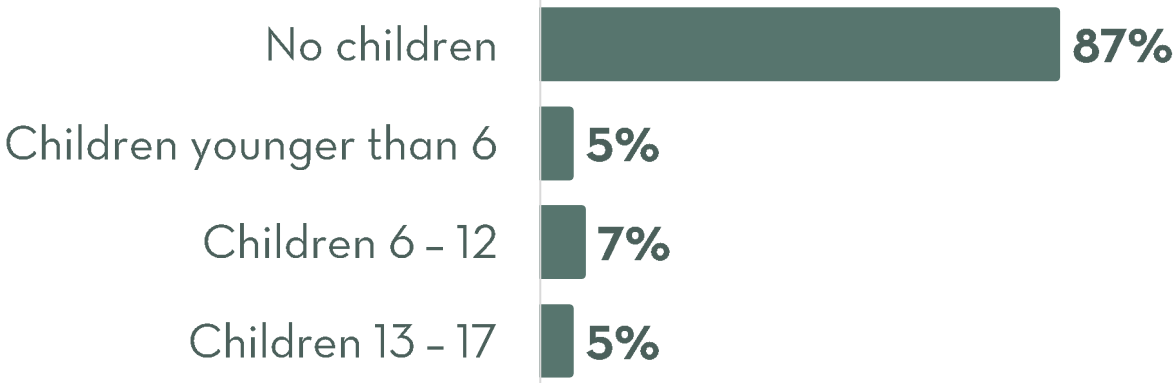
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.4** people
- » Over **2 in 5** visitors traveled as a couple
- » **13%** of visitors traveled with one or more children in their travel party

Travel Party Composition



Children in Travel Party*



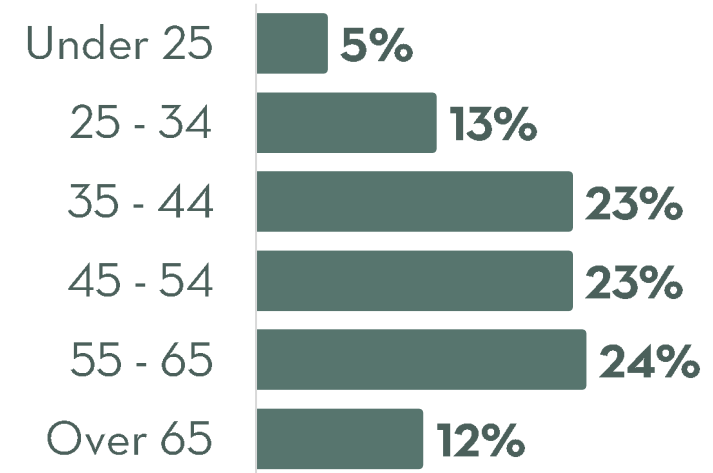
*Multiple responses permitted.

GENDER

» Nearly **3 in 5** visitors to Maine interviewed were females

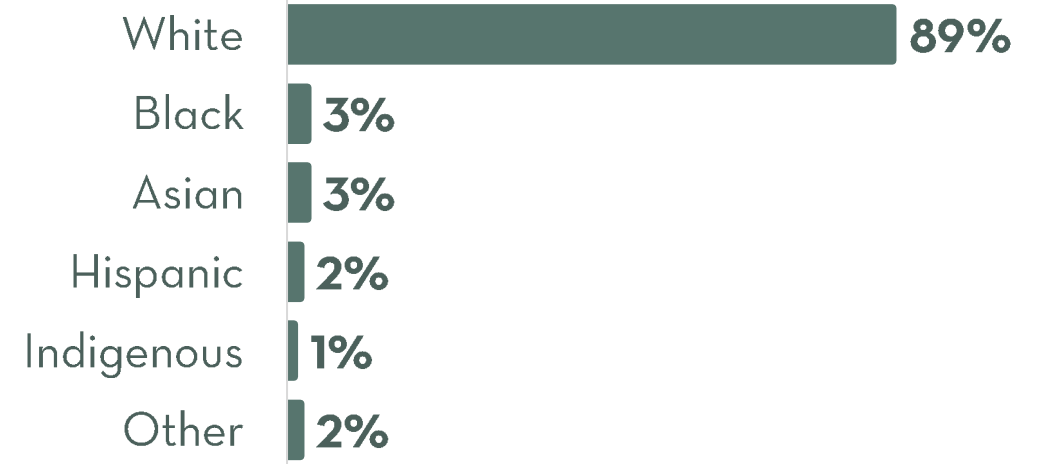


» The average age of visitors to Maine is **49** years old



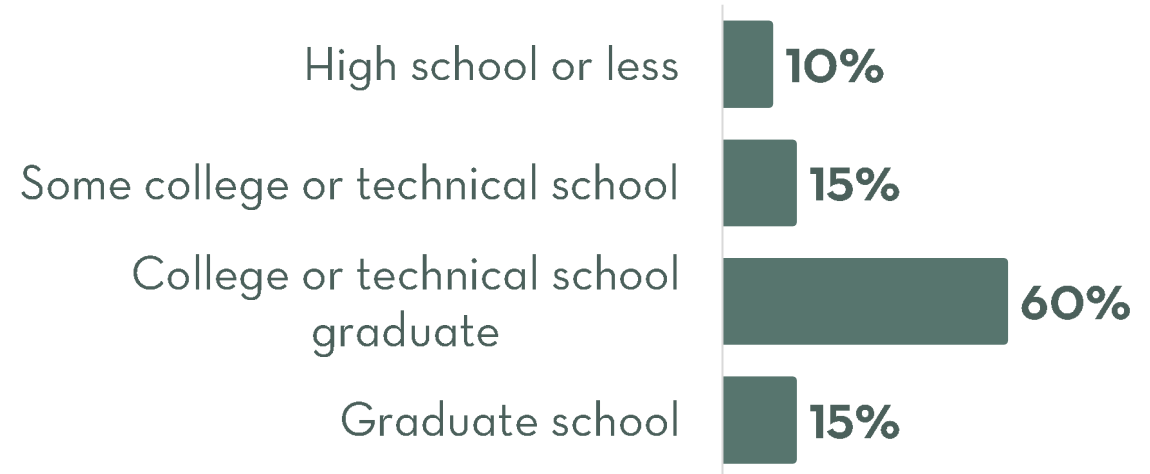
RACE & ETHNICITY

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



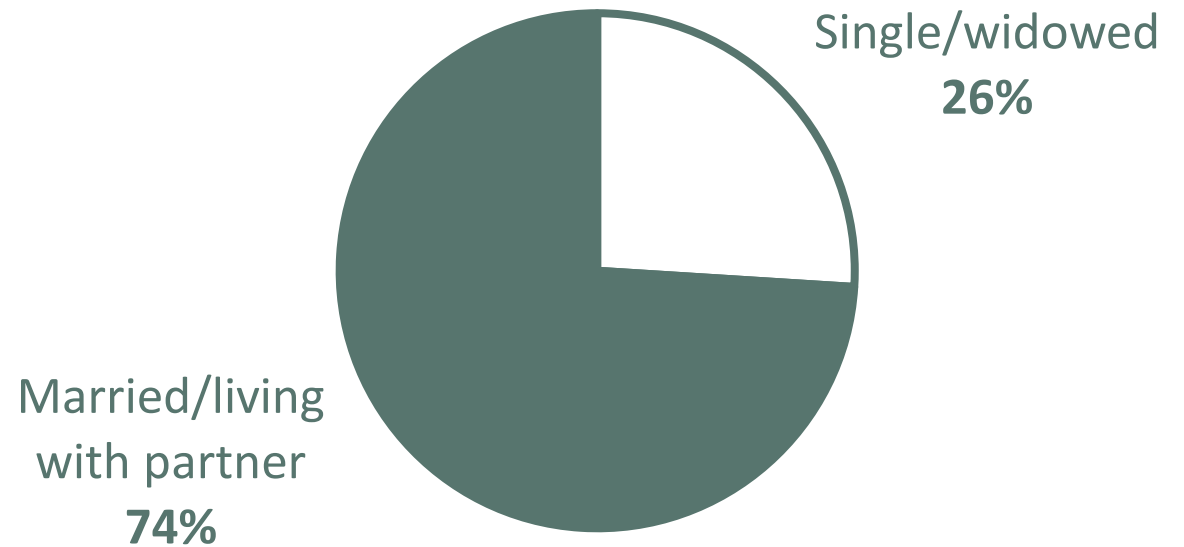
EDUCATIONAL ATTAINMENT

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



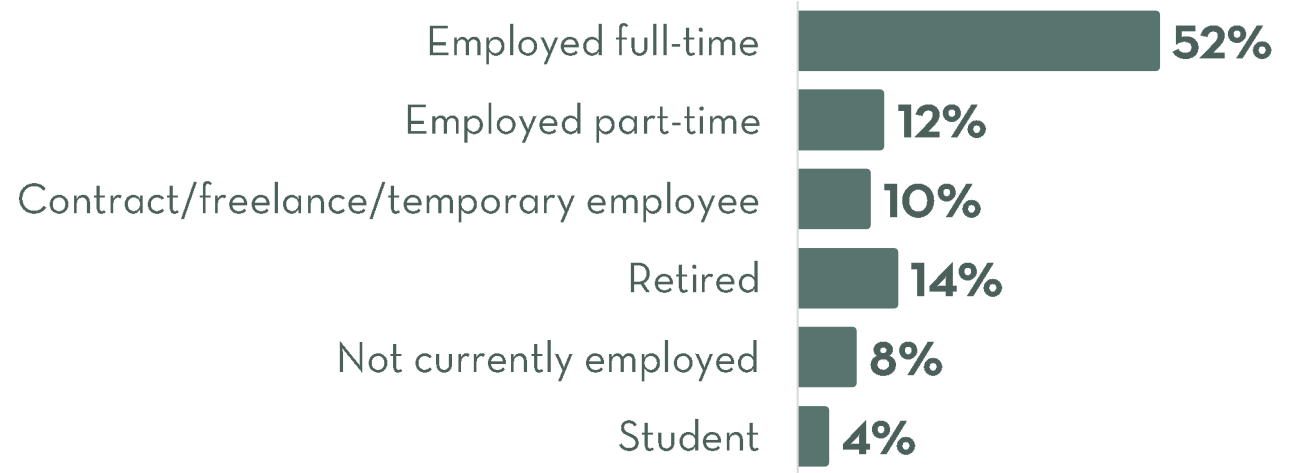
MARITAL STATUS

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



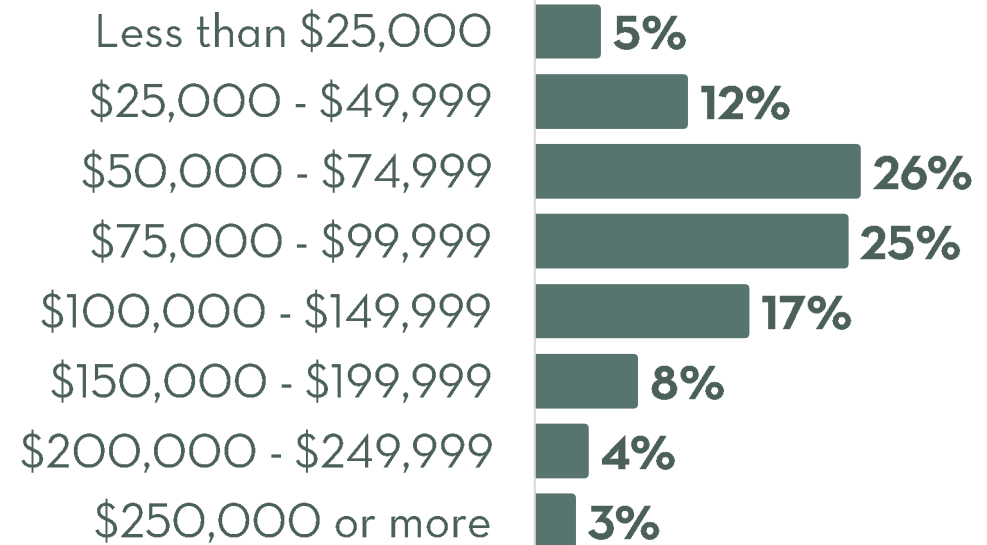
EMPLOYMENT STATUS

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



HOUSEHOLD INCOME

- » The average household income of visitors to Maine is **\$82,000** per year
- » **15%** of visitors to Maine earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » **11%** of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as **35%** had previously traveled in Maine more than 10 times

This is my first time



11%

2 - 5 times

29%

6 - 10 times

25%

11+ times

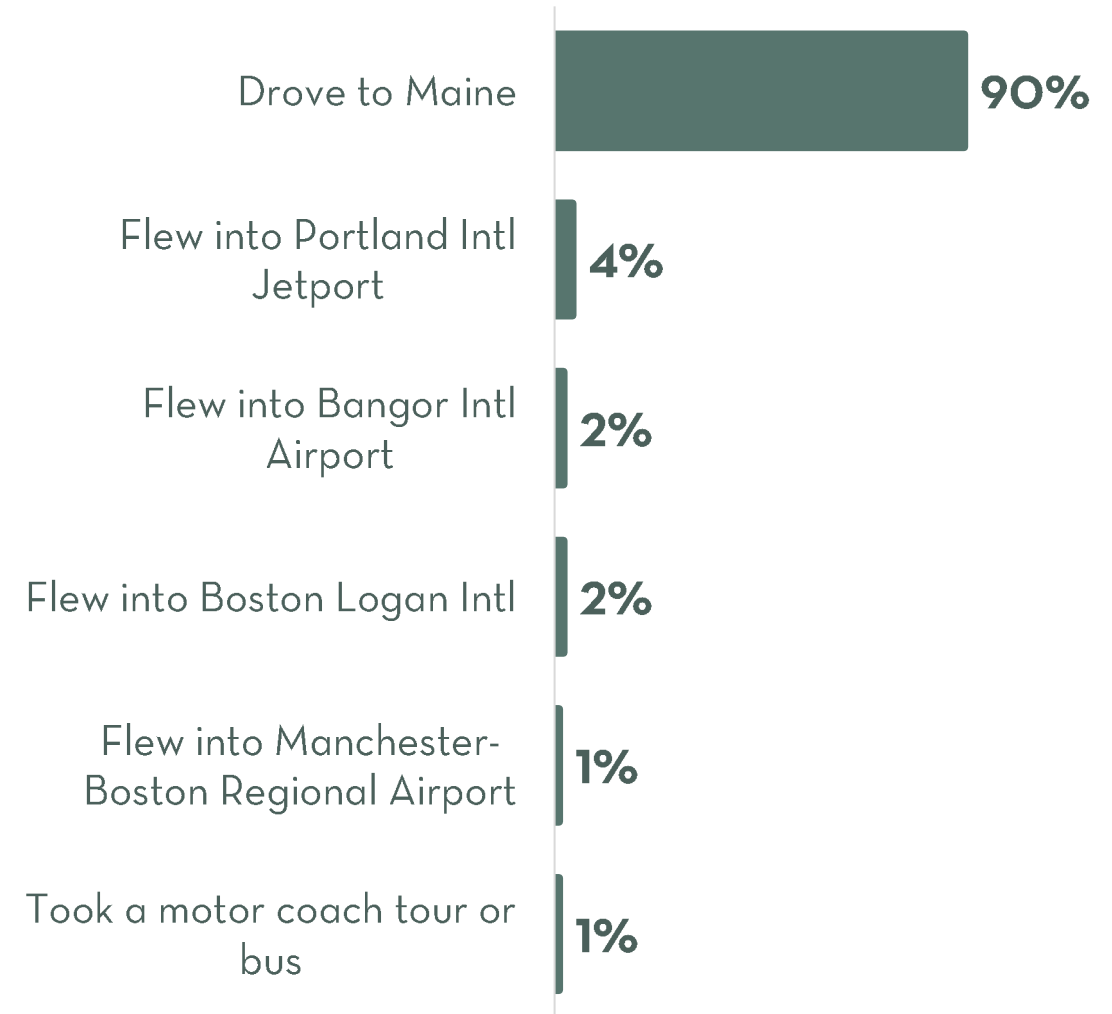
35%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



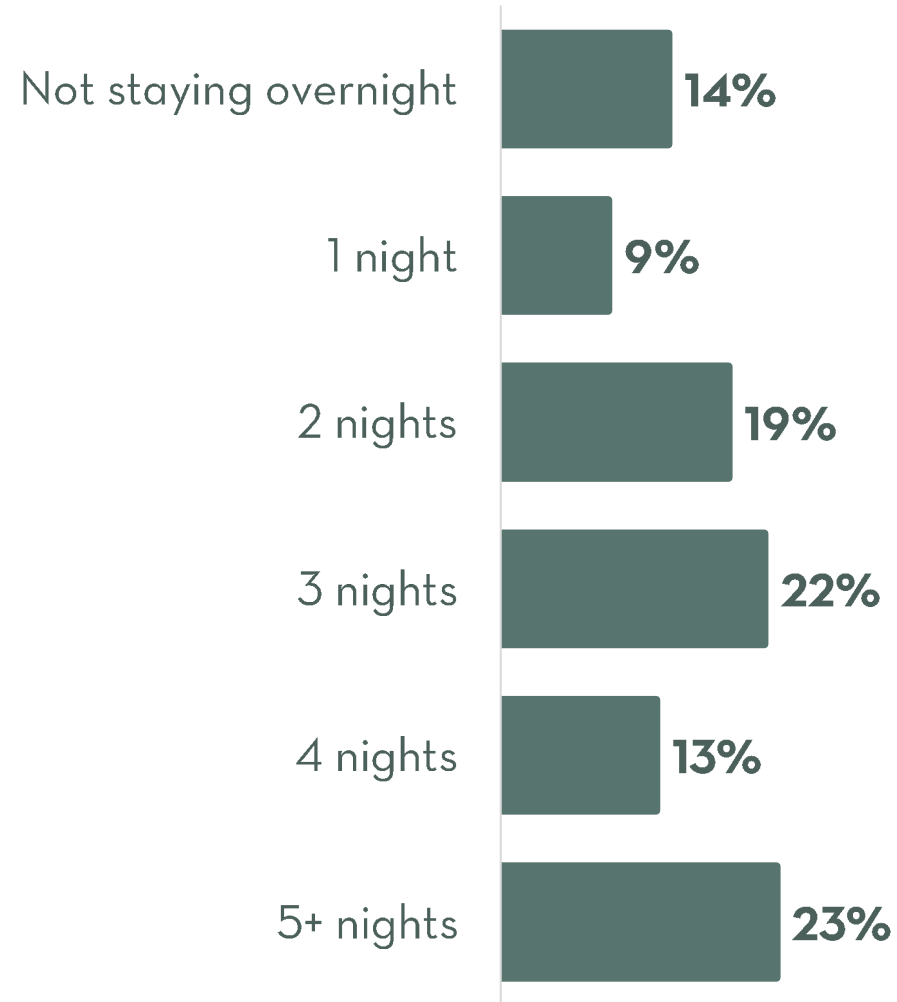
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **90%** choosing to travel by car over plane, motor coach/bus, or train (+3% points from 2022)
- » Most visitors who flew to Maine arrived at Portland International Jetport or Bangor International Airport



NIGHTS STAYED

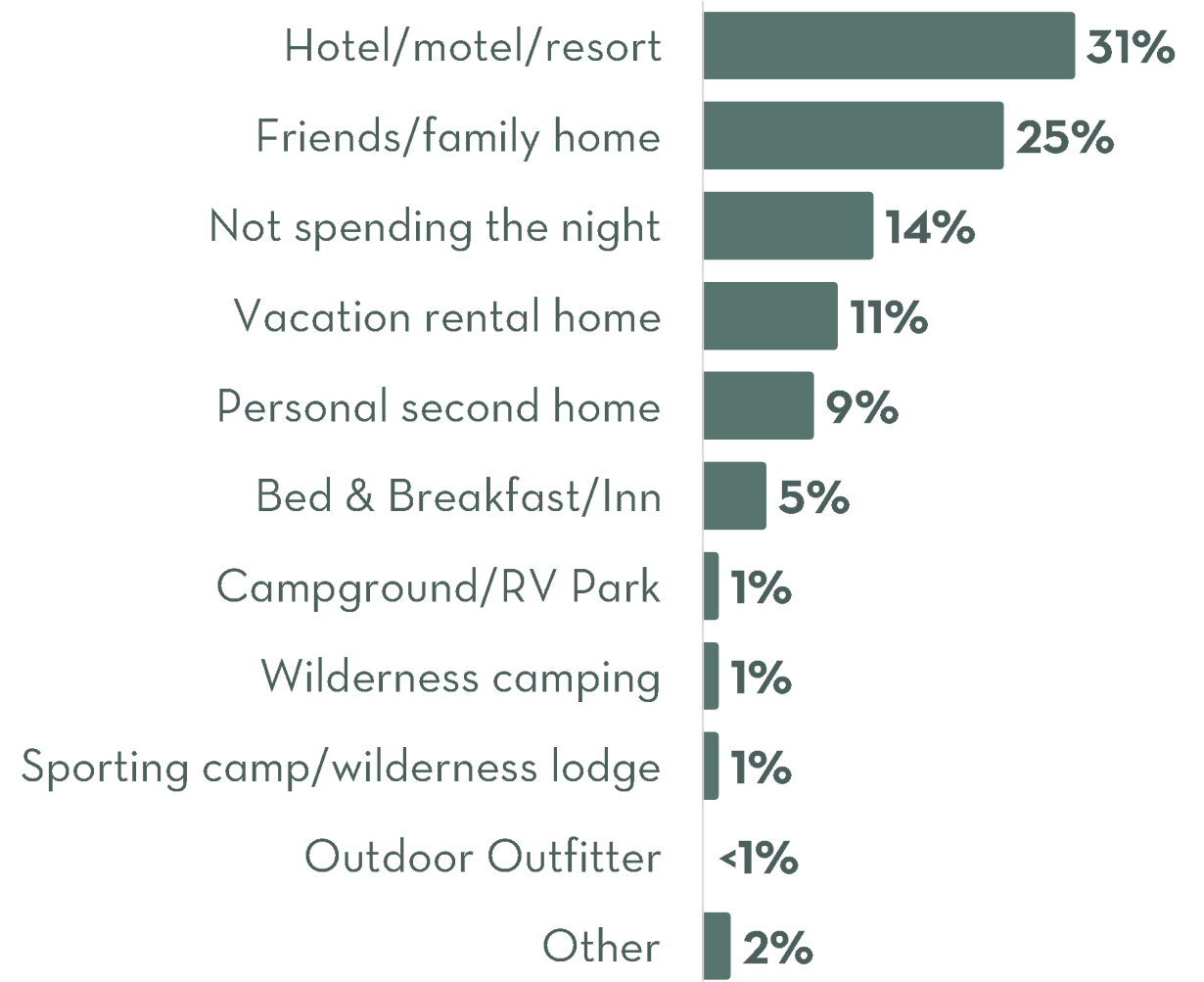
- » **86%** of visitors stayed one or more nights in Maine on their trip (-4% points from 2022)
- » Typical visitors stayed **4.3*** nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed **4.2** nights in Maine on their trips



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

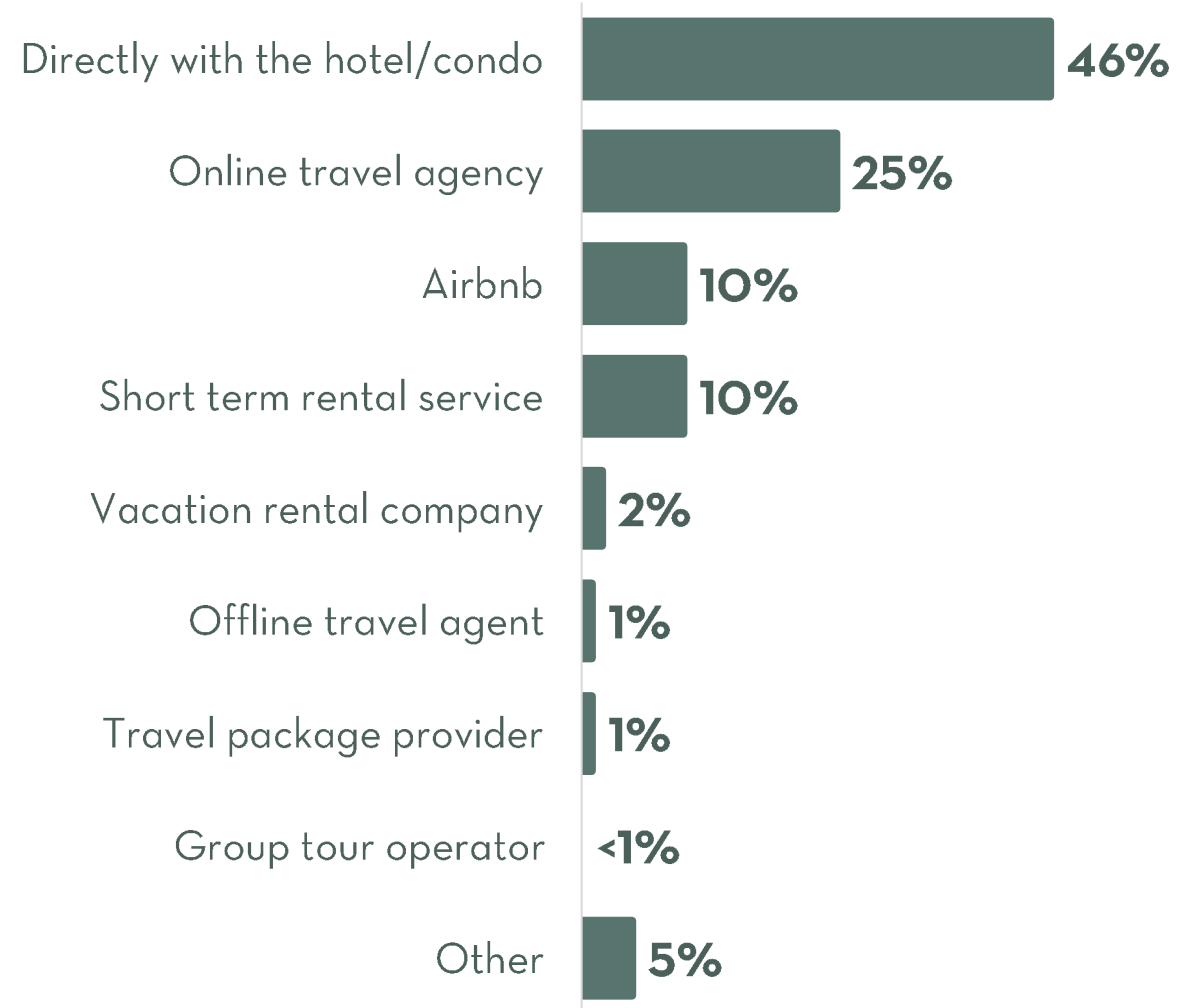
ACCOMMODATIONS

- » Over **3 in 10** visitors stayed overnight at a hotel/motel/resort
- » About **1 in 4** visitors stayed with friends and relatives on their trip to Maine



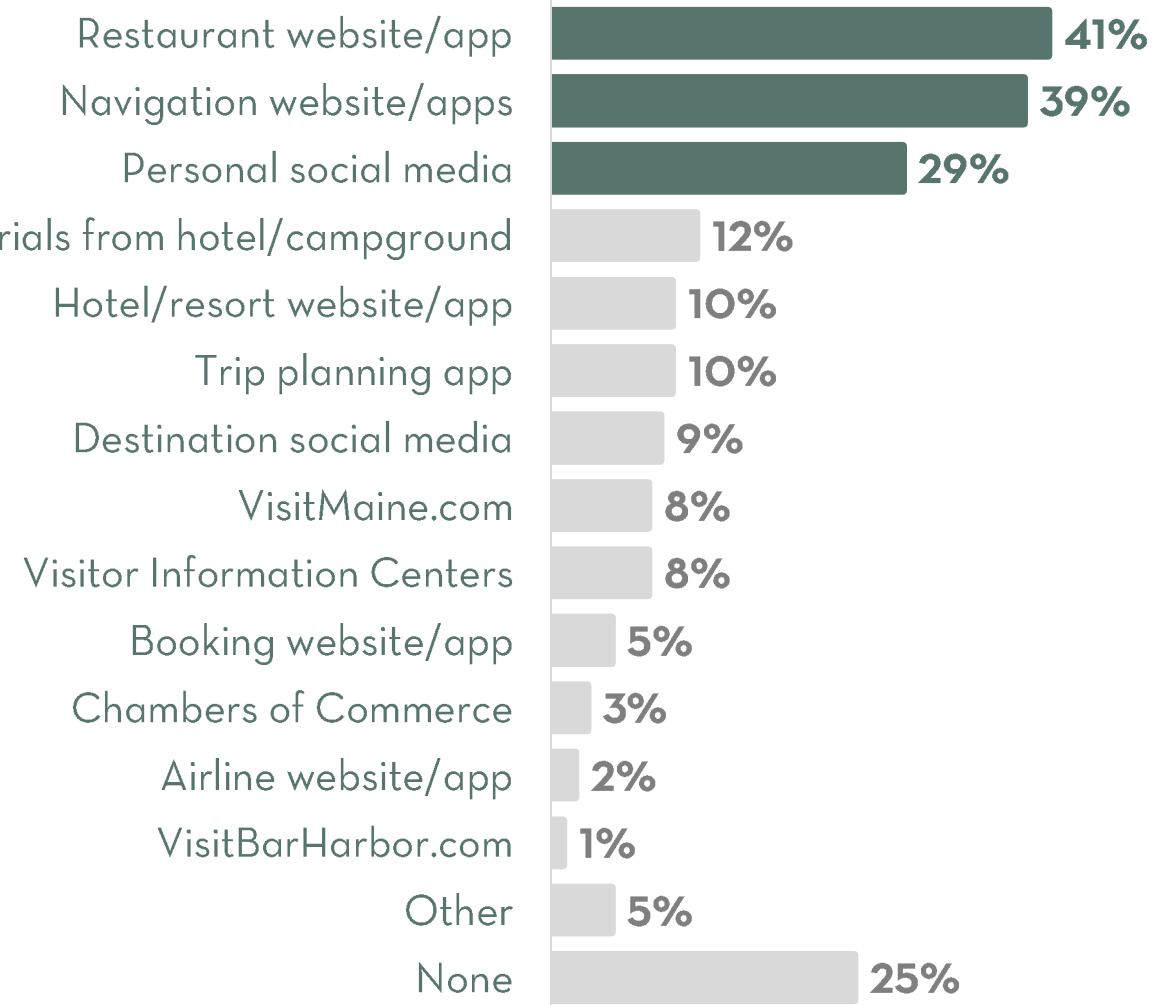
BOOKING METHODS

- » Nearly **half** of visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo (-6% points form 2022)



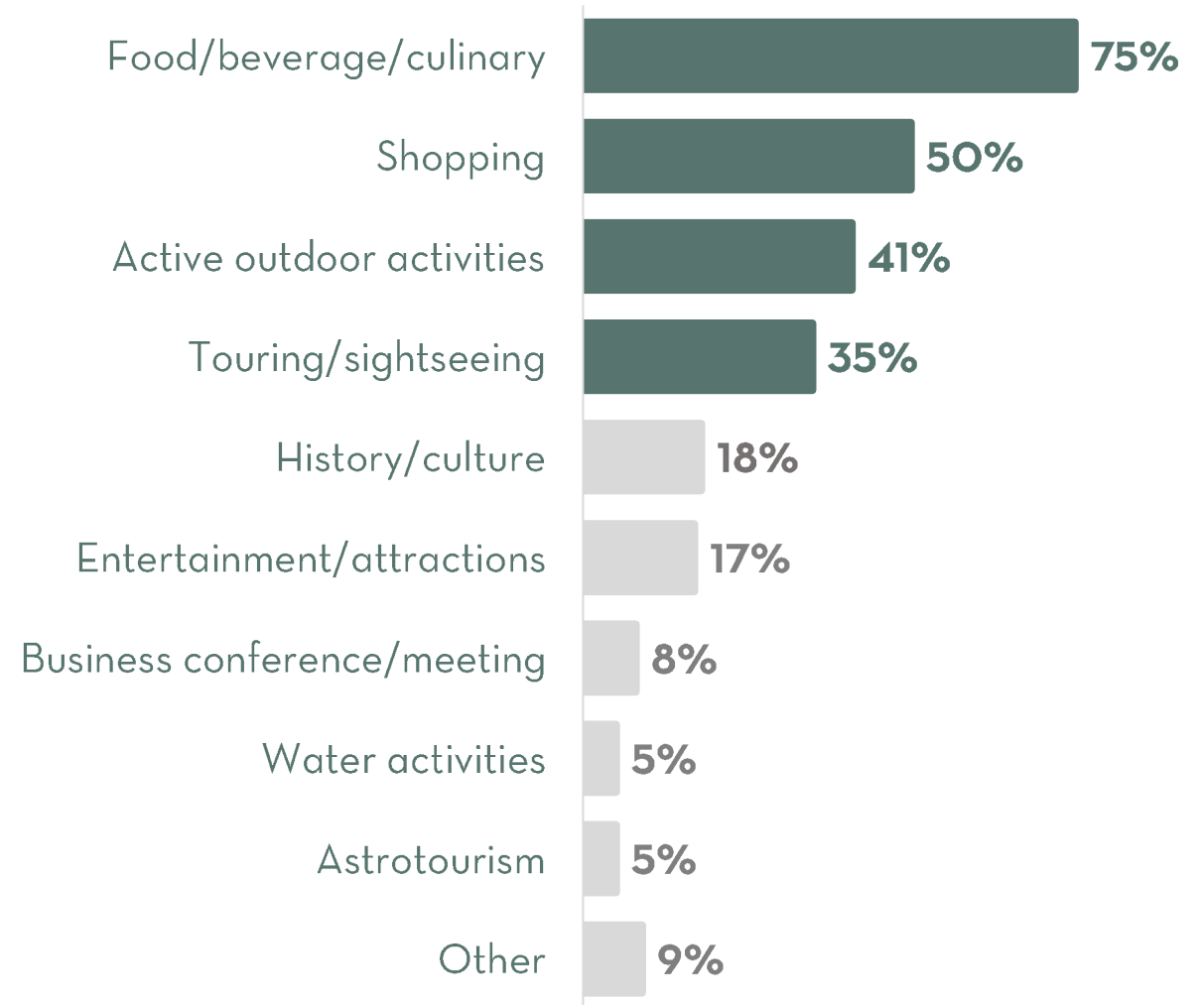
IN-MARKET VISITOR RESOURCES*

- » Visitors were more likely to rely on **restaurant** (+13% points from 2022) **and navigation websites/apps** to plan activities in-market
- » Nearly **3 in 10** visitors used their personal social media (+9% points from 2022)
- » **1 in 4** visitors did not use any resources to plan activities while they were in-market

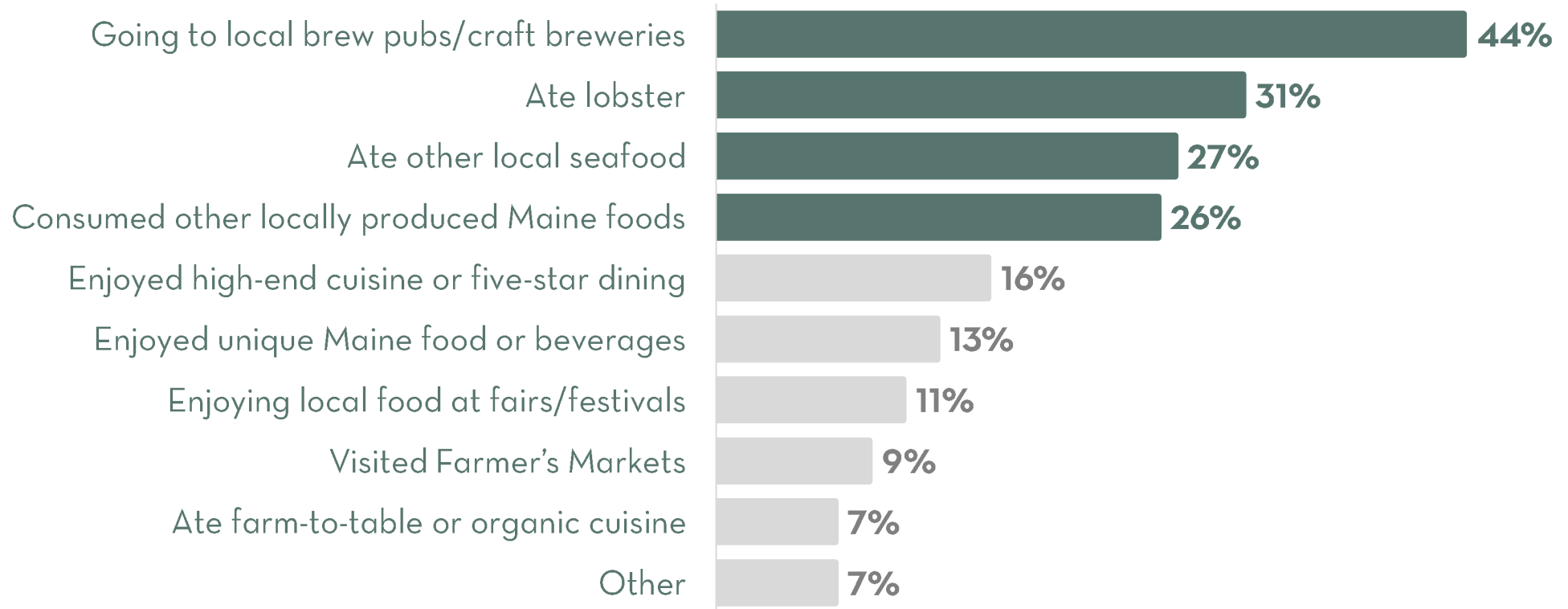


VISITOR ACTIVITIES*

- » **75%** of visitors engaged in food/beverage/culinary activities during their trip to Maine
- » **Half** of visitors went shopping during their trip to Maine

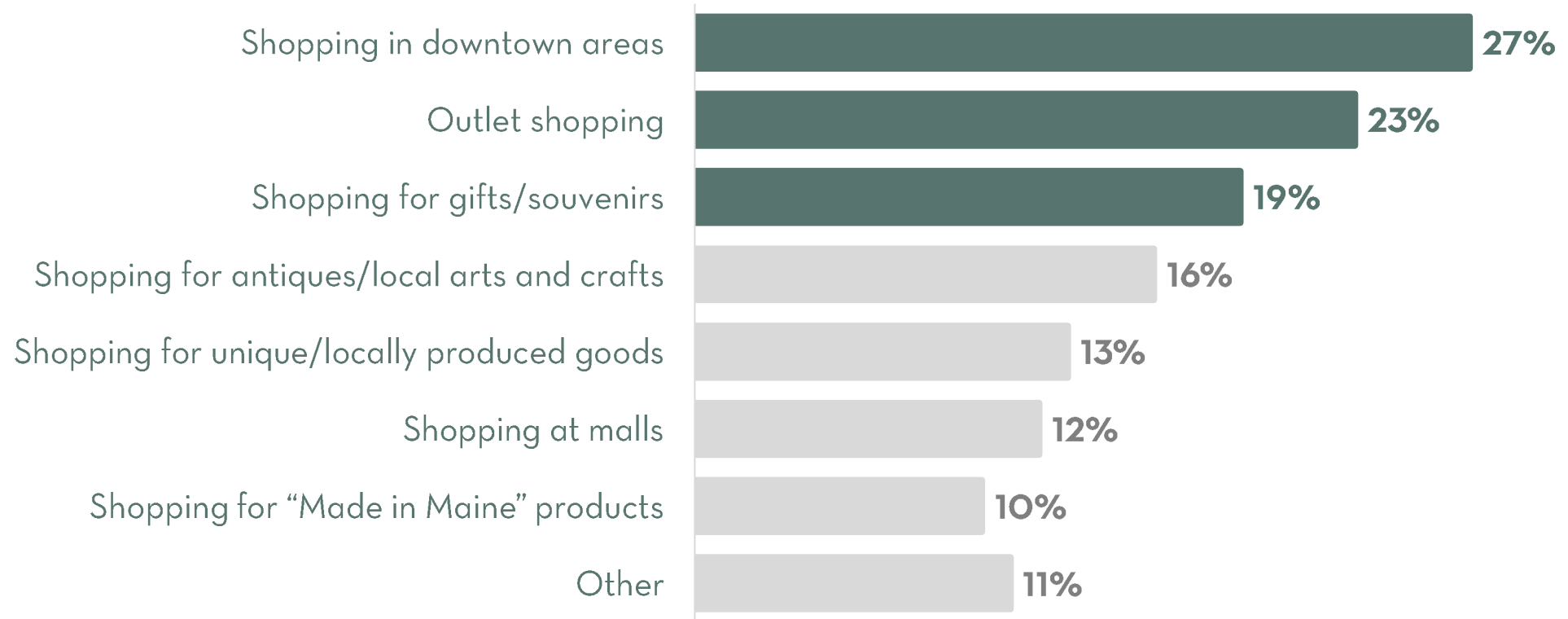


FOOD & BEVERAGE ACTIVITIES*

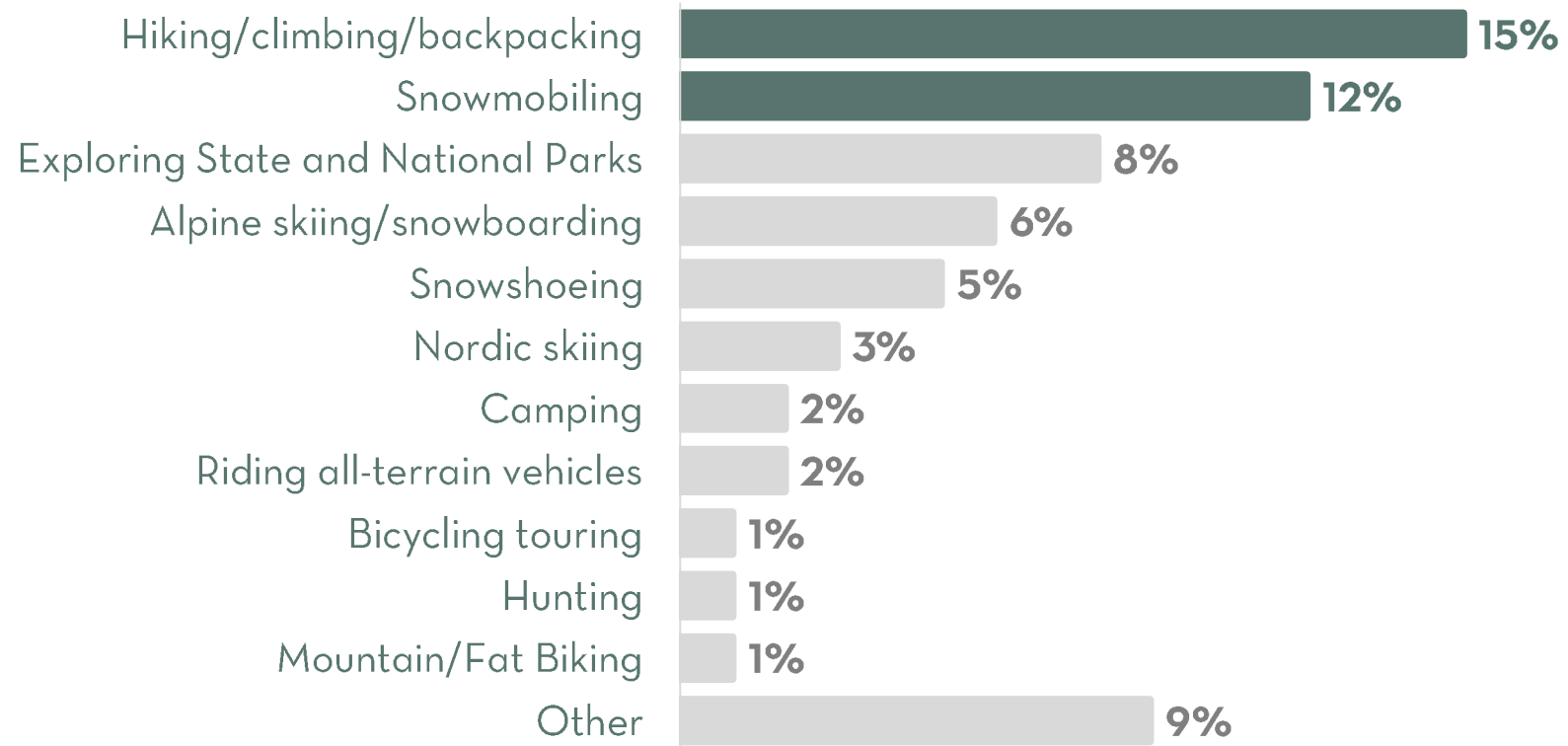


*Multiple responses permitted.

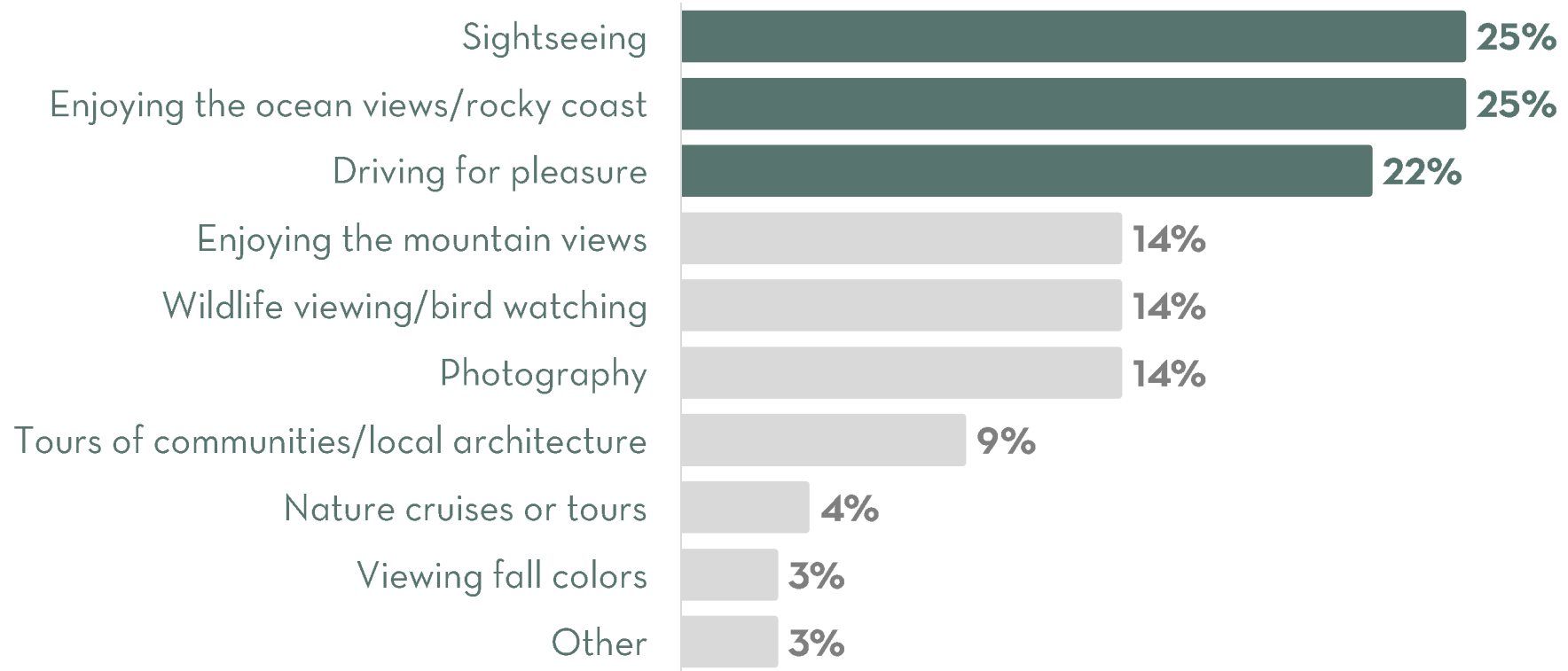
SHOPPING ACTIVITIES*



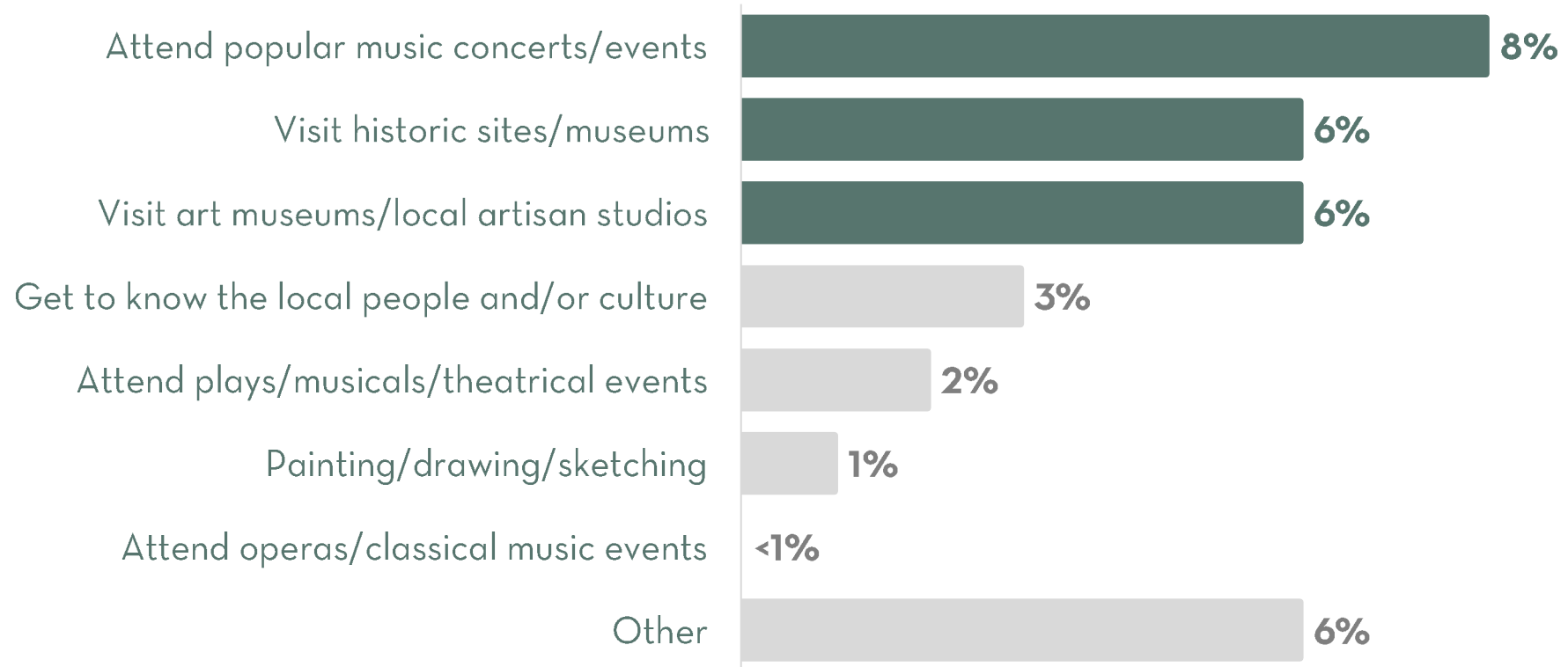
ACTIVE OUTDOOR ACTIVITIES*



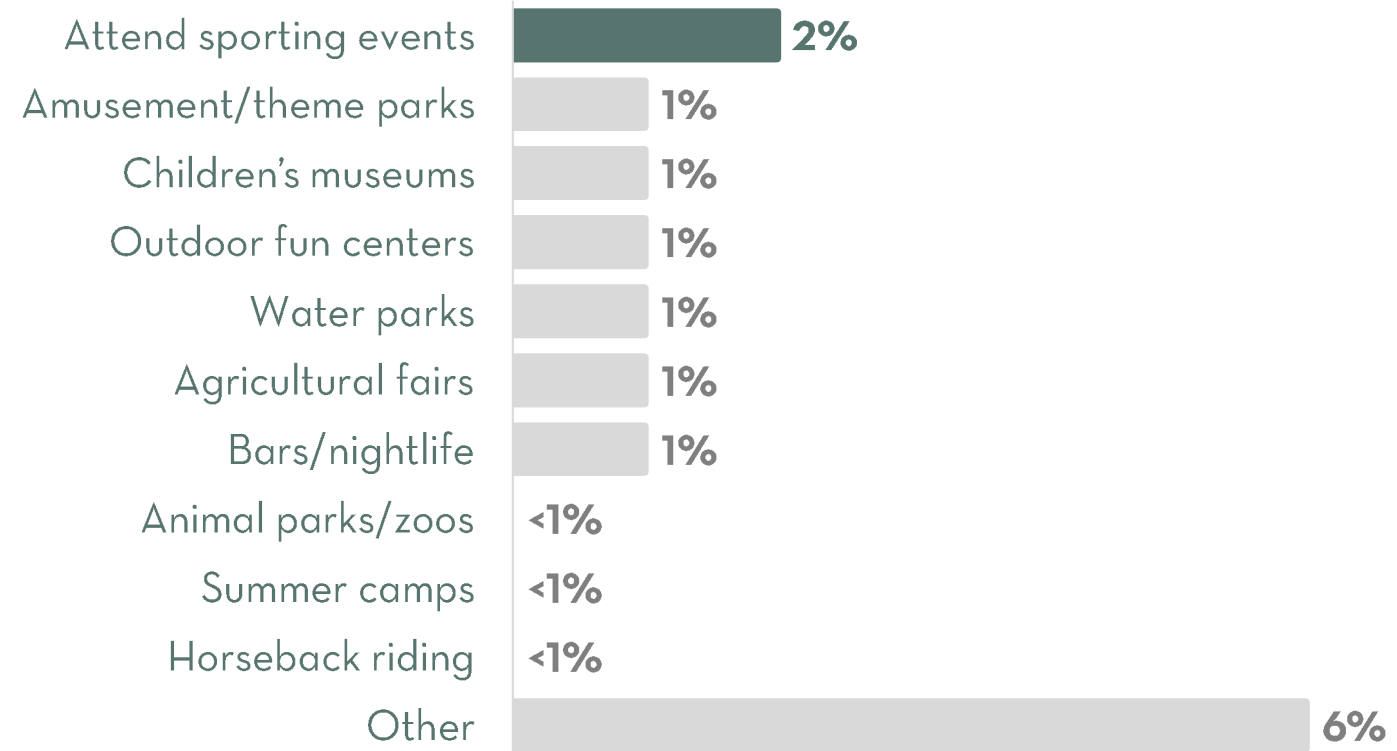
TOURING & SIGHTSEEING ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



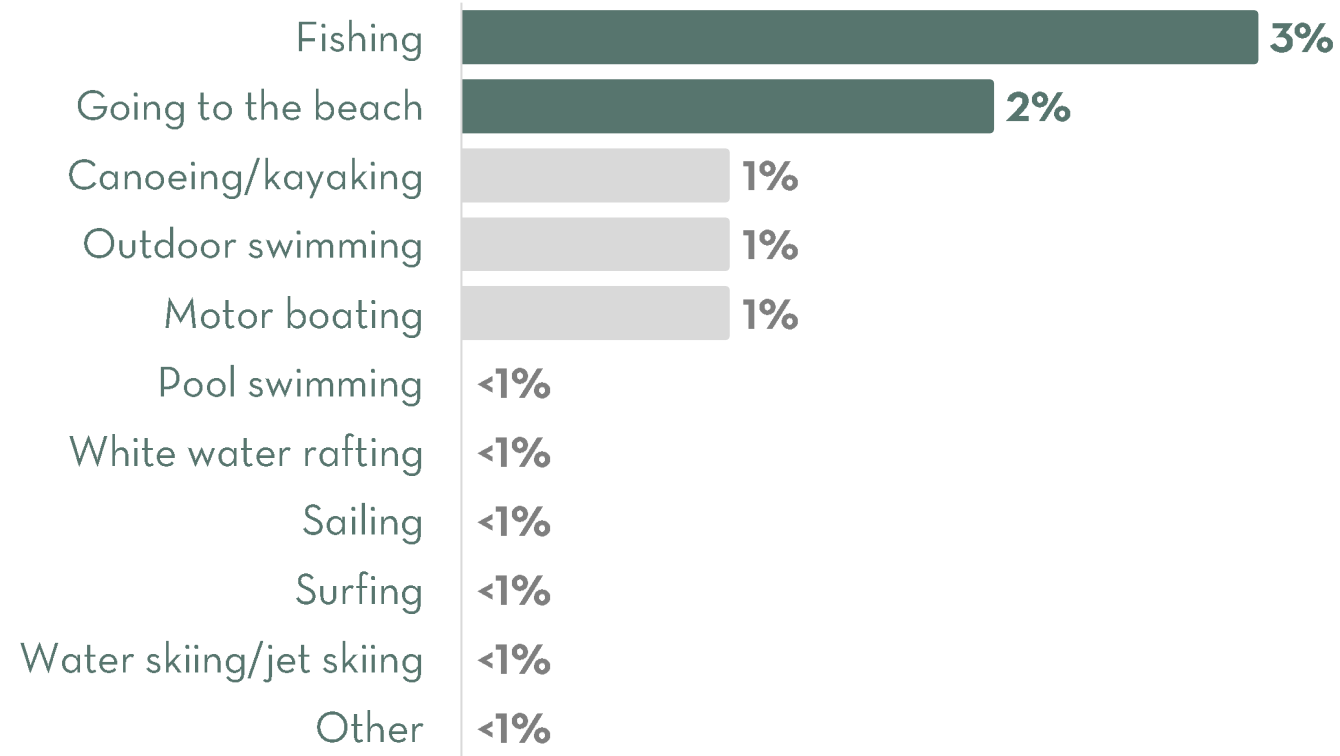
ENTERTAINMENT ACTIVITIES*



*Multiple responses permitted.

**Other includes visiting the Botanical Gardens and special events.

WATER ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

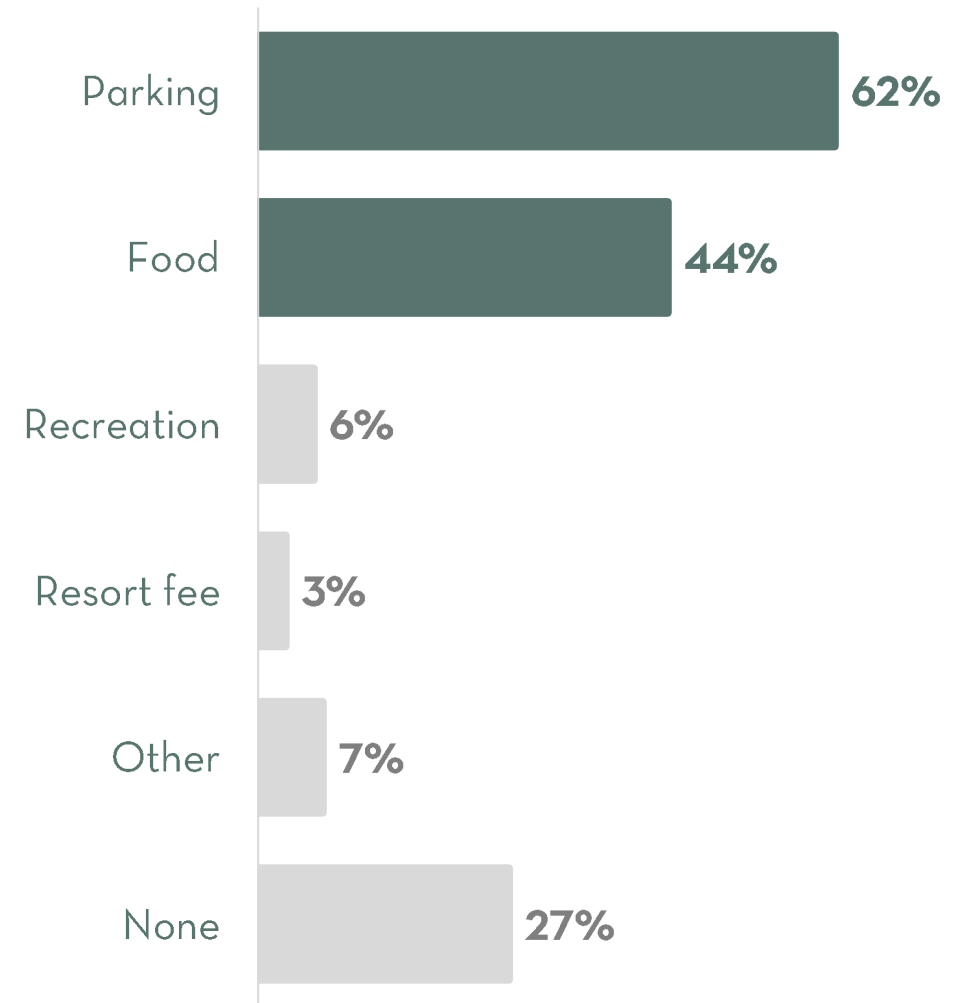
| | Paid Lodging | Unpaid Lodging | Day Trippers |
|--------------------------|--------------|----------------|--------------|
| Accommodations | \$155 | \$0 | \$0 |
| Restaurants | \$111 | \$81 | \$63 |
| Groceries | \$25 | \$32 | \$8 |
| Shopping | \$98 | \$54 | \$75 |
| Activities & attractions | \$45 | \$25 | \$14 |
| Transportation | \$38 | \$35 | \$29 |
| Other | \$10 | \$7 | \$5 |
| Daily Spending | \$482 | \$234 | \$194 |

TOTAL TRAVEL PARTY SPENDING

| | Paid Lodging | Unpaid Lodging | Day Trippers |
|--------------------------|----------------|----------------|--------------|
| Accommodations | \$651 | \$0 | \$0 |
| Restaurants | \$466 | \$470 | \$63 |
| Groceries | \$105 | \$186 | \$8 |
| Shopping | \$412 | \$313 | \$75 |
| Activities & attractions | \$189 | \$145 | \$14 |
| Transportation | \$160 | \$203 | \$29 |
| Other | \$42 | \$41 | \$5 |
| Trip Spending | \$2,025 | \$1,358 | \$194 |

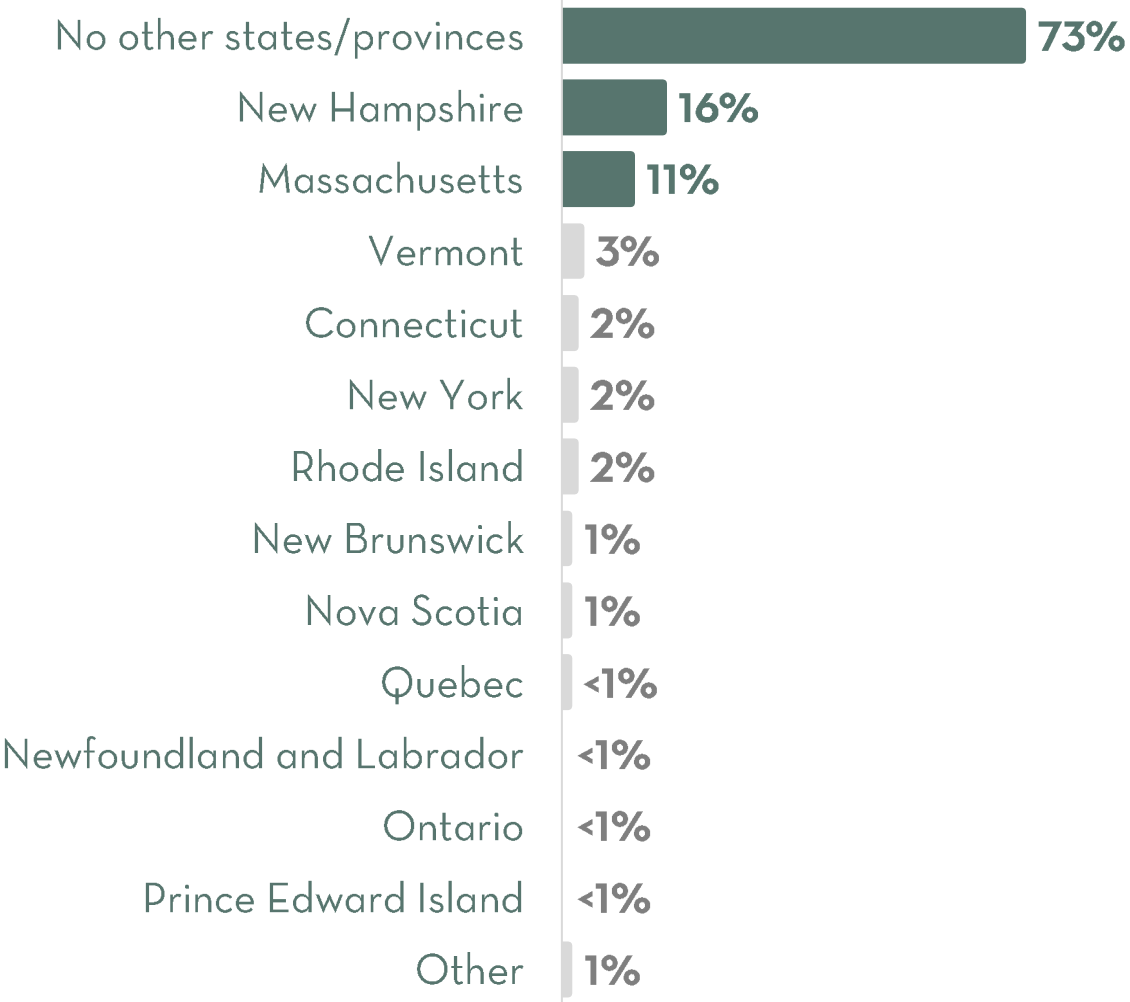
LODGING AMENITIES*

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



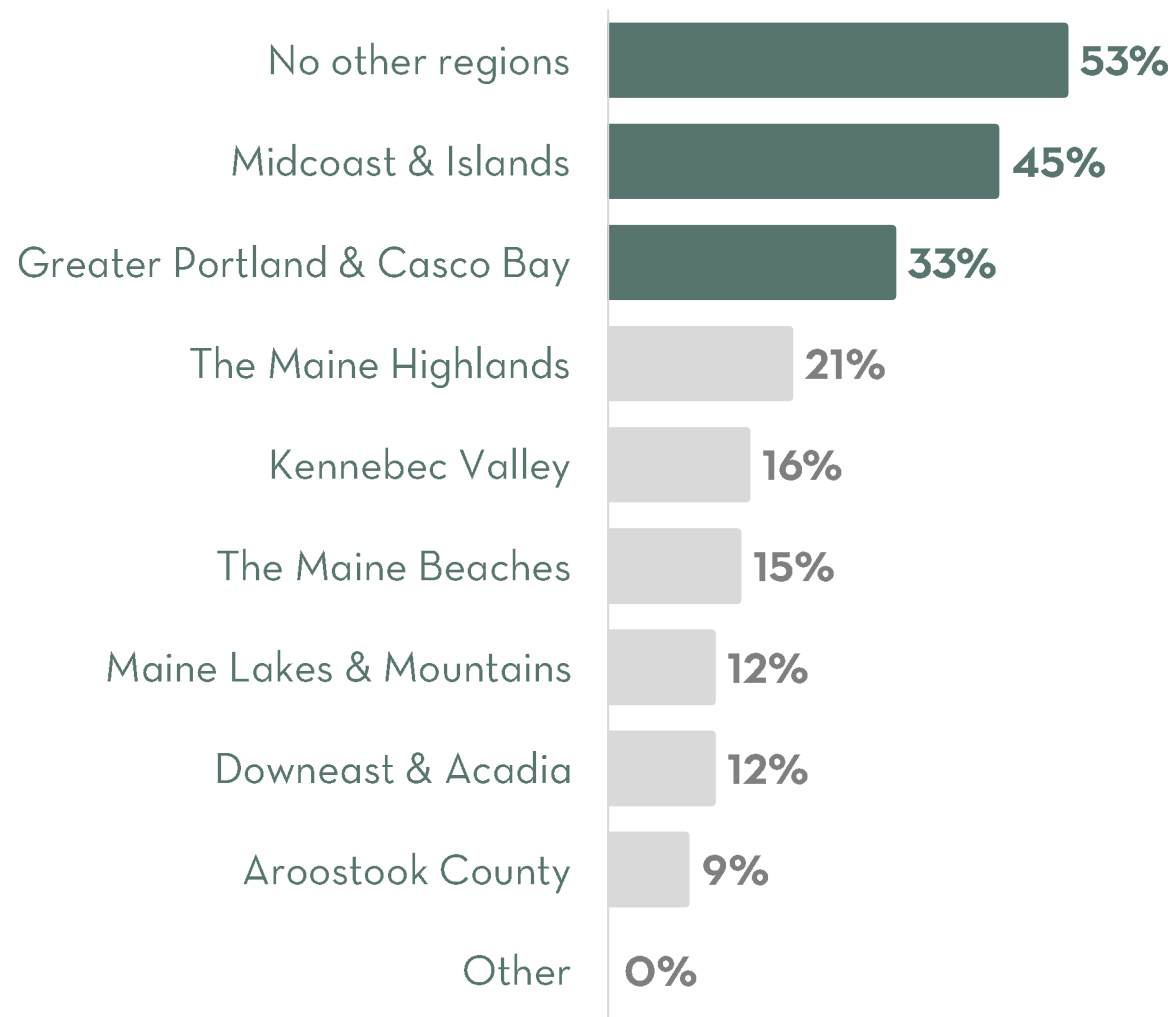
OTHER STATES & PROVINCES VISITED*

- » Over **7 in 10** visitors did not visit any other U.S. state or Canadian province during their trip (-5% points from 2022)
- » 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 **half** of visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state (-5% points from 2022)
- » **45%** of visitors visited the Midcoast & Islands area in addition to their primary destination within Maine (+18% points from 2022)



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



UNIQUENESS

"Welcoming and friendly people, a relaxing environment, numerous activities, great natural landmarks, and great seafood."



"There are so many different areas to visit. You can be at the lighthouses on the ocean in the morning and then travel for a few hours and be in the mountains watching the sunset."



"Sweet escape from the city madness. Good fresh food. Clean and beautiful environment."



UNIQUENESS

"Relaxation in a state that demands letting go of the rat race. Peaceful and beautiful."



"Outstanding performance arts. Visual arts. Scenery inland and coastline."



"Maine has many attractions that may be found in other states. Maine is different because Maine has ALL of these attractions within its borders."



HIGHLIGHTS

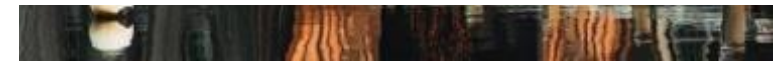
"Spending time with my mom and sister while relaxing and eating great food was the highlight of my trip because we never get to do that. We haven't spent time together like that in several years, and I honestly can't remember the last time we did. We had a really good time we had good food and we laughed a lot."



"Came up here for sled run at my old club, and because we don't have enough snow, Washburn and Mapleton have the best trails, and we rent the same house every other weekend. The warming hut they just built is amazing and very central to our runs."



"The highlight of my trip was the driving part because, being a passenger, I got to see the sights as we were going to Bar Harbor."



HIGHLIGHTS

"Spending time with family. Board games by the wood stove by candlelight."



"Snowmobile trails are amazing, and the cold was a bit crazy but worth it the clubs are great"



"Seeing the freshly fallen snow on the buildings and trees."

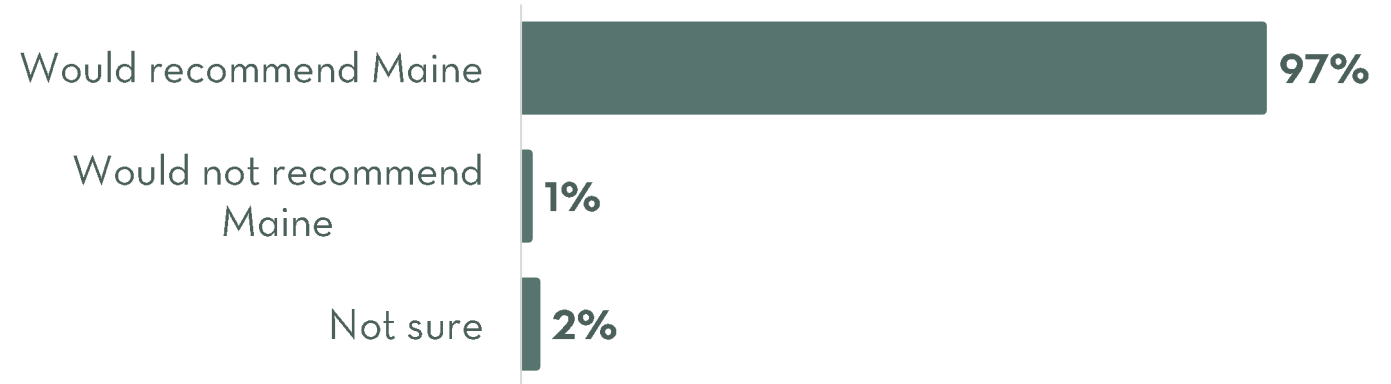


RECOMMENDING MAINE & ITS REGIONS

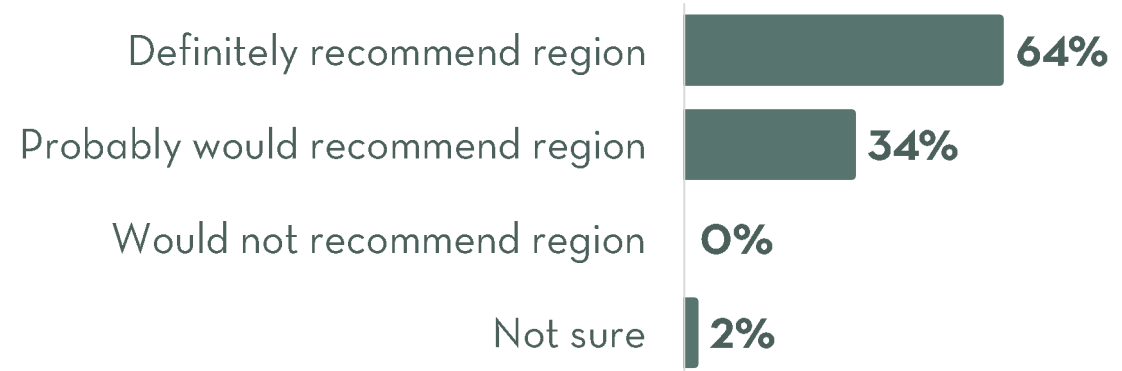
» **97%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation

» **98%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **64%** would definitely recommend

Likelihood of Recommending Maine

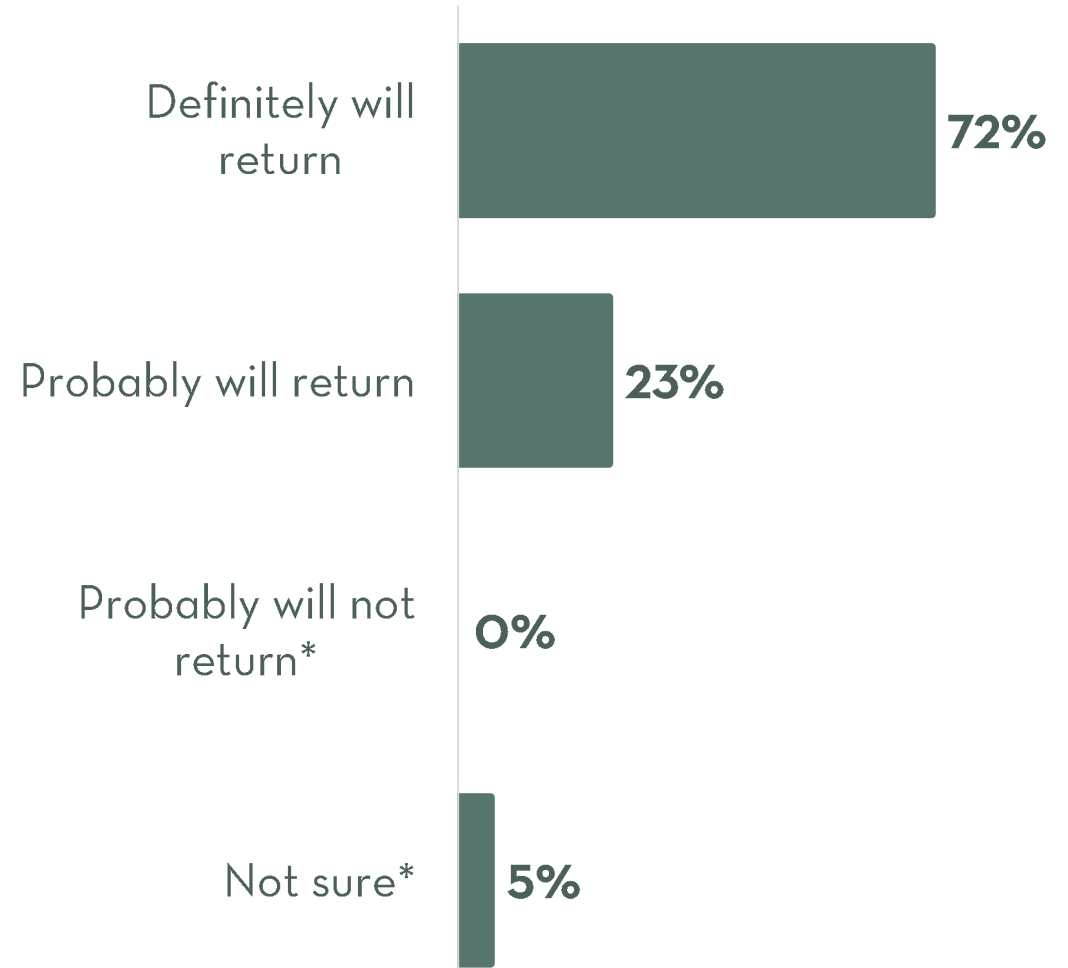


Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

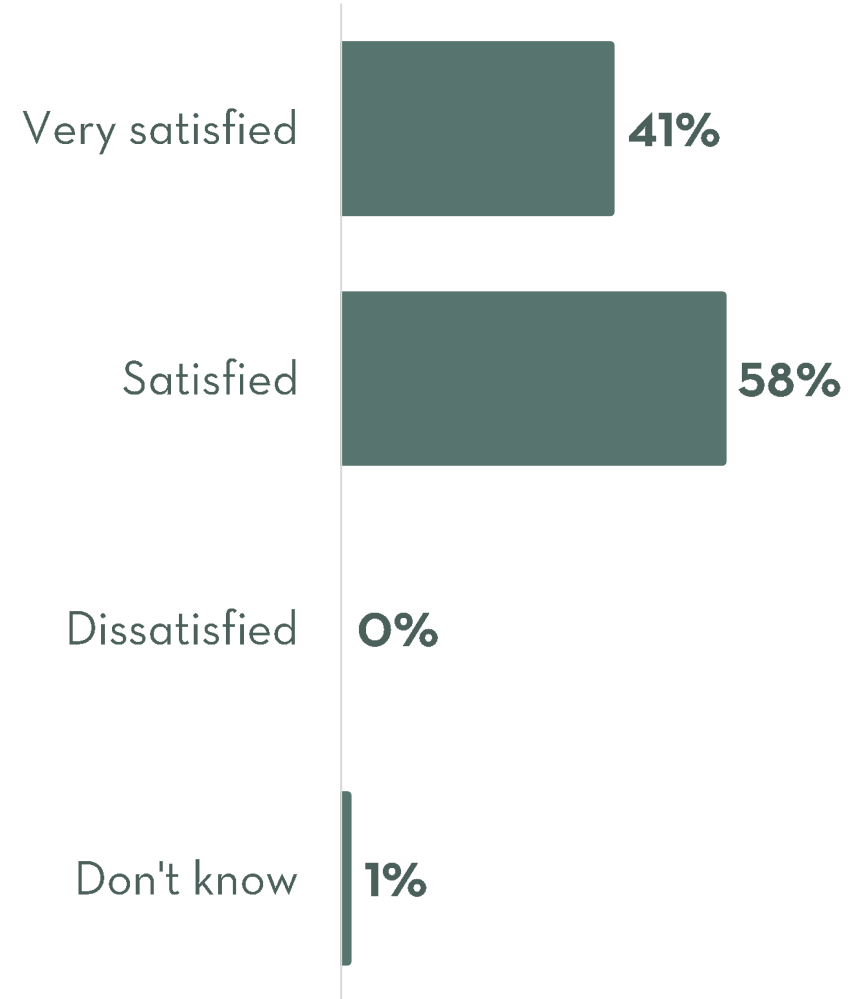
» **95%** of visitors will return to Maine for a future visit or vacation



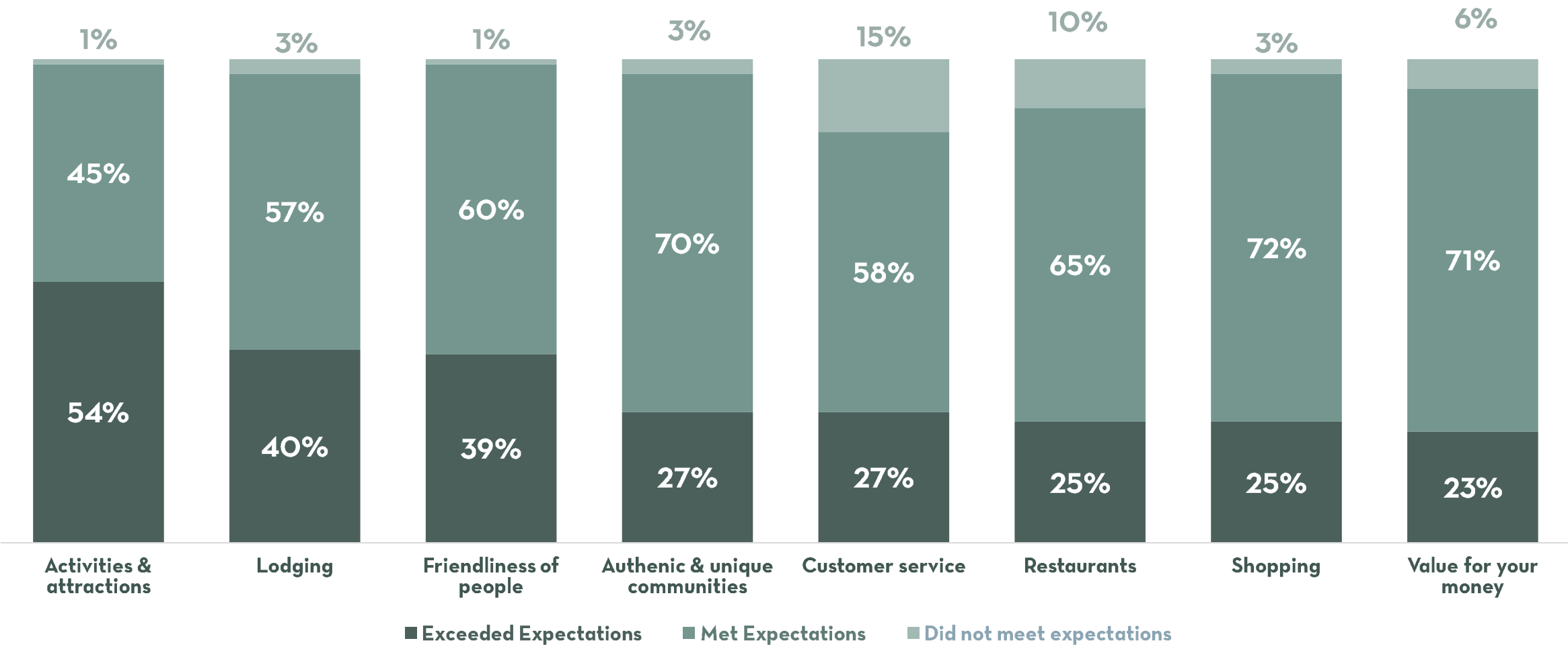
*5% of all visitors are not sure or will probably not return to Maine for the following reasons:
1. Airline service is too limited/too expensive 2. Traffic/difficult to drive 3. Prefer a variety of destinations.

SATISFACTION

- » **99%** of visitors were satisfied with their trip to Maine
- » Over **2 in 5** visitors were very satisfied with their trip to Maine

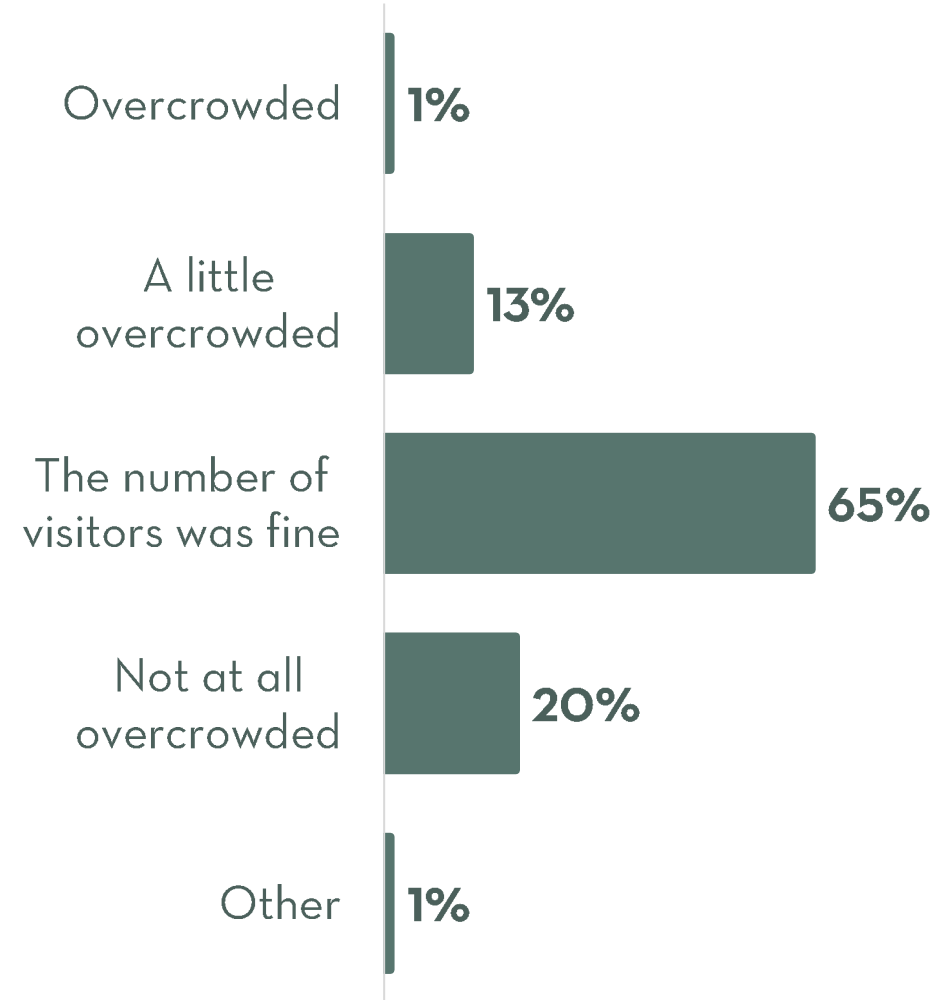


TRIP EXPECTATIONS



OVERCROWDING

- » **65%** of visitors thought the number of visitors during their trip to Maine was fine
- » Only **13%** of visitors thought it was a little overcrowded



PERCEPTIONS

"We decided to forgo our traditional small town holiday events and see how other towns did it up. Was not disappointed. Heart warming small town moments in little towns along the coast. Proof that you can live in Maine and still vacation in Maine."



"Very rural, and I was disappointed in the restaurant or lack of the only one in this town closes way to early, but all that is worth it if you love to be outside riding, and I really enjoy meeting folks from Canada on the trails and pitstops."



"Very happy to finally discover the Pine Tree State. Extraordinary natural beauty. Vast expanses without urban scenes. Treat to eat fresh seafood. The craft brew and oysters were excellent. The Gardens are spectacular."



PERCEPTIONS

"To get a good sense of early American history start in Maine. The historic cemeteries are beautiful. Very old. Lots of seniors who are willing to share recollections. It was warm and sunny. Beautiful."



"There's a saying in Maine that says if you don't like the weather, wait a minute. We had hopes to do snow activities, but it was so warm that people brought out their motorcycles. Today, ice. You learn to pivot in Maine and go with the flow. All good."



"The sparseness of the snowmobile trails and how well they are maintained and marked blew my mind, and the moose were all over the trails at night, but they were very easy to spot in the moonlight there. I've never seen a night sky like it."



ANNUAL COMPARISONS



TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

| Trip Planning Cycle | 2022 | 2023 |
|------------------------|------|------|
| A week or less | 22% | 20% |
| 2 - 3 weeks | 23% | 22% |
| 1 - 2 months | 33% | 36% |
| 3 - 4 months | 13% | 14% |
| 5 - 6 months | 4% | 4% |
| 7 months - 1 year | 3% | 2% |
| More than 1 year | 2% | 2% |
| Days in Planning Cycle | 35 | 37 |

| Booking Window | 2022 | 2023 |
|------------------------|------|------|
| A week or less | 29% | 26% |
| 2 - 3 weeks | 24% | 25% |
| 1 - 2 months | 32% | 35% |
| 3 - 4 months | 10% | 9% |
| 5 - 6 months | 2% | 3% |
| 7 months - 1 year | 2% | 1% |
| More than 1 year | 1% | 1% |
| Days in Booking Window | 20 | 21 |

ONLINE TRIP PLANNING SOURCES*

| Online Trip Planning Sources | 2022 | 2023 |
|--------------------------------|------|------|
| Online search engines | 32% | 33% |
| Facebook | 8% | 21% |
| Hotel websites | 18% | 20% |
| Online travel agency | 9% | 15% |
| Instagram | 8% | 12% |
| Traveler reviews/blogs/stories | 7% | 11% |
| TripAdvisor | 9% | 10% |
| Visit Maine social media | 6% | 10% |
| VisitMaine.com | 13% | 9% |
| YouTube | 5% | 9% |
| VRBO/HomeAway | 7% | 8% |
| Airbnb | 6% | 7% |
| Airline websites | 8% | 7% |
| MaineTourism.com | 7% | 4% |
| Vacation rental websites | 6% | 3% |
| VisitPortland.com | 5% | 3% |
| VisitAroostook.com | 1% | 2% |
| DowneastAcadia.com | 2% | 2% |
| MainesMidCoast.com | 3% | 2% |
| VisitBarHarbor.com | 1% | 2% |
| DiscoverNewEngland.com | 1% | 1% |
| TheMaineHighlands.com | 1% | 1% |
| TheMaineBeaches.com | 2% | 1% |
| MaineLakesandMountains.com | 2% | 1% |
| Twitter | 1% | 1% |
| KennebecValley.org | 1% | <1% |
| Other | 6% | 4% |
| None | 34% | 31% |

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

| Other Trip Planning Sources | 2022 | 2023 |
|--|------|------|
| Advice from friends/family | 36% | 47% |
| Articles or travelogues | 15% | 21% |
| AAA | 10% | 11% |
| Travel planning apps | 6% | 7% |
| Travel guides/brochures | 9% | 5% |
| Called the Maine Office of Tourism | 7% | 3% |
| Travel books & magazines | 4% | 3% |
| Called local Chambers of Commerce | 4% | 2% |
| Visitor Guide | 3% | 2% |
| Visit Maine e-newsletter | 3% | 2% |
| Travel agent | 2% | 2% |
| Called local convention and visitors bureaus | 1% | 1% |
| Called another Maine Tourism/Lodging Association | 1% | 1% |
| Other | 4% | 3% |
| None | 41% | 36% |

REASON FOR VISITING*

| Reasons for Visiting | 2022 | 2023 |
|----------------------------|------|------|
| Visiting friends/relatives | 34% | 40% |
| Relax and unwind | 26% | 22% |
| Shopping | 14% | 19% |
| Special occasion | 15% | 16% |
| Sightseeing/touring | 22% | 16% |
| Special event | 11% | 15% |
| Snow activities | 11% | 13% |
| Nature & bird watching | 12% | 12% |
| Conference/meeting | 9% | 9% |
| Active outdoor activities | 5% | 6% |
| Culture/museums/history | 4% | 5% |
| Beach | 5% | 3% |
| Attractions | 3% | 3% |
| Sporting event | 1% | 3% |
| Water activities | 2% | 1% |
| Astrotourism | 1% | 1% |
| Other | 15% | 13% |

OTHER STATES/PROVINCES CONSIDERED*

| Other States/Provinces Considered | 2022 | 2023 |
|-----------------------------------|------|------|
| No other states/provinces | 72% | 63% |
| New Hampshire | 14% | 22% |
| Massachusetts | 10% | 13% |
| Vermont | 6% | 5% |
| Rhode Island | 4% | 4% |
| Connecticut | 3% | 3% |
| New York | 5% | 3% |
| Quebec | 2% | 2% |
| New Brunswick | 1% | 1% |
| Nova Scotia | 1% | 1% |
| Ontario | 1% | 1% |
| Newfoundland and Labrador | 1% | <1% |
| Prince Edward Island | 1% | <1% |
| Other | 2% | 1% |

ADVERTISING/PROMOTIONS

| Recalled Advertising | 2022 | 2023 |
|----------------------|------|------|
| Yes | 46% | 59% |
| No | 40% | 29% |
| Not sure | 14% | 12% |

| Influenced by Advertising | 2022* | 2023 |
|---------------------------|-------|------|
| Yes | NA | 60% |

*The influence of advertising question was not included until Summer of 2022.

ADVERTISING/PROMOTIONS*

| Sources of Advertising Noticed* | 2022 | 2023 |
|---------------------------------|------|------|
| Social media | 39% | 57% |
| Internet | 31% | 36% |
| Magazine | 19% | 27% |
| Radio | 12% | 20% |
| Cable or satellite television | 14% | 12% |
| Newspaper | 6% | 9% |
| VisitMaine.com | 8% | 8% |
| AAA | 5% | 8% |
| Traveler reviews/blogs | 5% | 6% |
| Maine travel/visitor guide | 7% | 5% |
| Online streaming service | 4% | 5% |
| Brochure | 4% | 3% |
| Music/podcast streaming | 4% | 3% |
| Deal – based promotion | 2% | 2% |
| Billboard | 2% | 2% |
| Other | 5% | 3% |
| Not sure | 1% | 1% |

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

| Region of Origin | 2022 | 2023 |
|------------------|------|------|
| Maine | 19% | 30% |
| New England | 39% | 34% |
| Mid-Atlantic | 18% | 15% |
| Southeast | 11% | 8% |
| Southwest | 2% | 2% |
| Midwest | 5% | 4% |
| West | 3% | 2% |
| Canada | 3% | 4% |
| International | 1% | 1% |

ORIGIN STATE/PROVINCE

| Origin States & Provinces | 2022 | 2023 |
|---------------------------|------|------|
| Maine | 19% | 30% |
| Massachusetts | 20% | 16% |
| New Hampshire | 9% | 9% |
| Connecticut | 5% | 5% |
| New York | 6% | 5% |
| Florida | 4% | 4% |
| New Jersey | 3% | 3% |
| Pennsylvania | 3% | 3% |
| New Brunswick | 2% | 3% |
| Rhode Island | 2% | 2% |
| Vermont | 2% | 2% |
| Virginia | 2% | 2% |
| Maryland | 2% | 2% |
| North Carolina | 2% | 2% |

ORIGIN MARKET

| Origin Markets | 2022 | 2023 |
|--|------|------|
| Boston | 11% | 10% |
| New York City ¹ | 6% | 6% |
| Portland | 2% | 4% |
| Washington DC - Baltimore ² | 4% | 3% |
| Waterville | 2% | 2% |
| Bangor | 2% | 2% |
| Augusta | 1% | 2% |
| Auburn - Lewiston | 1% | 2% |
| Rochester - Portsmouth, NH | 1% | 2% |
| Providence, RI | 2% | 2% |
| Belfast | 1% | 2% |
| Philadelphia | 2% | 2% |

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

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

TRAVEL PARTY SIZE/COMPOSITION

| Travel Party Composition | 2022 | 2023 |
|----------------------------|------|------|
| Traveled alone | 22% | 20% |
| As a couple | 45% | 42% |
| As a family | 19% | 20% |
| With business associates | 2% | 3% |
| In a tour group | <1% | <1% |
| With other couples/friends | 12% | 15% |
| Other | <1% | <1% |
| Average Travel Party Size | 2.4 | 2.4 |

TRAVEL WITH CHILDREN*

| Children in Travel Party* | 2022 | 2023 |
|---------------------------|------|------|
| No children | 88% | 87% |
| Children younger than 6 | 4% | 5% |
| Children 6 – 12 | 6% | 7% |
| Children 13 – 17 | 5% | 5% |

| Gender | 2022 | 2023 |
|--------|------|------|
| Male | 49% | 43% |
| Female | 51% | 57% |

DEMOGRAPHIC PROFILE

| Age | 2022 | 2023 |
|------------|------|------|
| Under 25 | 6% | 5% |
| 25 – 34 | 14% | 13% |
| 35 – 44 | 18% | 23% |
| 45 – 54 | 23% | 23% |
| 55 – 65 | 28% | 24% |
| Over 65 | 11% | 12% |
| Median Age | 50 | 49 |

| Race/Ethnicity | 2022 | 2023 |
|----------------|------|------|
| White | 89% | 89% |
| Black | 4% | 3% |
| Asian | 3% | 3% |
| Hispanic | 3% | 2% |
| Indigenous | <1% | 1% |
| Other | 1% | 2% |

LIFESTYLE PROFILE

| Marital Status | 2022 | 2023 |
|-----------------------------|------|------|
| Single/widowed | 29% | 26% |
| Married/living with partner | 71% | 74% |

| Employment Status | 2022 | 2023 |
|---------------------------------------|------|------|
| Employed full-time | 53% | 52% |
| Employed part-time | 12% | 12% |
| Contract/freelance/temporary employee | 7% | 10% |
| Retired | 15% | 14% |
| Not currently employed | 8% | 8% |
| Student | 6% | 4% |

LIFESTYLE PROFILE

| Household Income | 2022 | 2023 |
|-------------------------|----------|----------|
| Less than \$25,000 | 6% | 5% |
| \$25,000 - \$49,999 | 11% | 12% |
| \$50,000 - \$74,999 | 24% | 26% |
| \$75,000 - \$99,999 | 24% | 25% |
| \$100,000 - \$149,999 | 21% | 17% |
| \$150,000 - \$199,999 | 8% | 8% |
| \$200,000 - \$249,999 | 3% | 4% |
| \$250,000 or more | 3% | 3% |
| Median Household Income | \$84,400 | \$82,000 |

LIFESTYLE PROFILE

| Educational Attainment | 2022 | 2023 |
|--------------------------------------|------|------|
| High school or less | 11% | 10% |
| Some college or technical school | 16% | 15% |
| College or technical school graduate | 54% | 60% |
| Graduate school | 20% | 15% |

NEW & RETURNING VISITORS

| Previous Trips to Maine | 2022 | 2023 |
|-------------------------|------|------|
| This is my first time | 13% | 11% |
| 2 - 5 times | 26% | 29% |
| 6 - 10 times | 22% | 25% |
| 11+ times | 39% | 35% |

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

| Means of Transportation | 2022 | 2023 |
|--|------|------|
| Drove to Maine | 87% | 90% |
| Flew into Portland Intl Jetport | 5% | 4% |
| Flew into Bangor Intl Airport | 3% | 2% |
| Flew into Boston Logan Intl | 2% | 2% |
| Flew into Manchester-Boston Regional Airport | 1% | 1% |
| Took a motor coach tour or bus | 1% | 1% |

LENGTH OF STAY

| Nights Stayed | 2022 | 2023 |
|------------------------|------|------|
| Not staying overnight | 18% | 14% |
| 1 night | 7% | 9% |
| 2 nights | 14% | 19% |
| 3 nights | 20% | 22% |
| 4 nights | 14% | 13% |
| 5+ nights | 27% | 22% |
| Average Length of Stay | 4.9 | 4.3 |

ACCOMMODATIONS

| Accommodations | 2022 | 2023 |
|--------------------------------|------|------|
| Hotel/motel/resort | 29% | 31% |
| Friends/family home | 28% | 25% |
| Not spending the night | 18% | 14% |
| Vacation rental home | 8% | 11% |
| Personal second home | 9% | 9% |
| Bed & Breakfast/Inn | 5% | 5% |
| Campground/RV Park | 1% | 1% |
| Wilderness camping | <1% | 1% |
| Sporting camp/wilderness lodge | 1% | 1% |
| Outdoor Outfitter | <1% | <1% |
| Other | 1% | 2% |

BOOKING

| Booking Methods | 2022 | 2023 |
|-------------------------------|------|------|
| Directly with the hotel/condo | 52% | 46% |
| Online travel agency | 19% | 25% |
| Airbnb | 9% | 10% |
| Short term rental service | 8% | 10% |
| Vacation rental company | 4% | 2% |
| Offline travel agent | 1% | 1% |
| Travel package provider | 1% | 1% |
| Group tour operator | <1% | <1% |
| Other | 5% | 5% |

IN-MARKET RESOURCES*

| In-Market Resources | 2022 | 2023 |
|---------------------------------|------|------|
| Restaurant website/app | 28% | 41% |
| Navigation website/apps | 38% | 39% |
| Personal social media | 20% | 29% |
| Materials from hotel/campground | 7% | 12% |
| Hotel/resort website/app | 16% | 10% |
| Trip planning app | 16% | 10% |
| Destination social media | 9% | 9% |
| VisitMaine.com | 15% | 8% |
| Visitor Information Centers | 10% | 8% |
| Booking website/app | 5% | 5% |
| Chambers of Commerce | 4% | 3% |
| Airline website/app | 2% | 2% |
| VisitBarHarbor.com | 1% | 1% |
| Other | 4% | 5% |
| None | 28% | 25% |

ACTIVITIES*

| Activities | 2022 | 2023 |
|-----------------------------|------|------|
| Food/beverage/culinary | 72% | 75% |
| Shopping | 51% | 50% |
| Active outdoor activities | 37% | 41% |
| Touring/sightseeing | 41% | 35% |
| History/culture | 16% | 18% |
| Entertainment/attractions | 14% | 17% |
| Business conference/meeting | 8% | 8% |
| Water activities | 7% | 5% |
| Astrotourism | 4% | 5% |
| Other | 11% | 9% |

FOOD & BEVERAGE ACTIVITIES*

| Food & Beverage Activities | 2022 | 2023 |
|--|------|------|
| Going to local brew pubs/craft breweries | 44% | 44% |
| Ate lobster | 38% | 31% |
| Ate other local seafood | 35% | 27% |
| Consumed other locally produced Maine foods | 23% | 26% |
| Enjoyed high-end cuisine or five-star dining | 19% | 16% |
| Enjoyed unique Maine food or beverages | 14% | 13% |
| Enjoying local food at fairs/festivals | 18% | 11% |
| Visited Farmer's Markets | 12% | 9% |
| Ate farm-to-table or organic cuisine | 8% | 7% |
| Other | 7% | 7% |

SHOPPING ACTIVITIES*

| Shopping Activities | 2022 | 2023 |
|---|------|------|
| Shopping in downtown areas | 30% | 27% |
| Outlet shopping | 25% | 23% |
| Shopping for gifts/souvenirs | 24% | 19% |
| Shopping for antiques/local arts and crafts | 21% | 16% |
| Shopping for unique/locally produced goods | 20% | 13% |
| Shopping at malls | 11% | 12% |
| Shopping for “Made in Maine” products | 19% | 10% |
| Other | 5% | 11% |

ACTIVE OUTDOOR ACTIVITIES*

| Active Outdoor Activities | 2022 | 2023 |
|------------------------------------|------|------|
| Hiking/climbing/backpacking | 16% | 15% |
| Snowmobiling | 11% | 12% |
| Exploring State and National Parks | 7% | 8% |
| Alpine skiing/snowboarding | 7% | 6% |
| Snowshoeing | 5% | 5% |
| Nordic skiing | 4% | 3% |
| Camping | 2% | 2% |
| Riding all-terrain vehicles | 3% | 2% |
| Bicycling touring | 3% | 1% |
| Hunting | 2% | 1% |
| Mountain/Fat Biking | 2% | 1% |
| Other | 9% | 9% |

TOURING & SIGHTSEEING ACTIVITIES*

| Touring & Sightseeing Activities | 2022 | 2023 |
|---|------|------|
| Sightseeing | 32% | 25% |
| Enjoying the ocean views/rocky coast | 30% | 25% |
| Driving for pleasure | 31% | 22% |
| Enjoying the mountain views | 13% | 14% |
| Wildlife viewing/bird watching | 22% | 14% |
| Photography | 15% | 14% |
| Tours of communities/local architecture | 9% | 9% |
| Nature cruises or tours | 7% | 4% |
| Viewing fall colors | 5% | 3% |
| Other | 3% | 3% |

HISTORY/CULTURE ACTIVITIES*

| History/Culture Activities | 2022 | 2023 |
|---|------|------|
| Attend popular music concerts/events | 5% | 8% |
| Visit historic sites/museums | 7% | 6% |
| Visit art museums/local artisan studios | 6% | 6% |
| Get to know the local people and/or culture | 3% | 3% |
| Attend plays/musicals/theatrical events | 3% | 2% |
| Painting/drawing/sketching | 1% | 1% |
| Attend operas/classical music events | 1% | <1% |
| Other | 3% | 6% |

ENTERTAINMENT ACTIVITIES*

| Entertainment Activities | 2022 | 2023 |
|--------------------------|------|------|
| Attend sporting events | 1% | 2% |
| Amusement/theme parks | 1% | 1% |
| Children's museums | 1% | 1% |
| Outdoor fun centers | 1% | 1% |
| Water parks | 1% | 1% |
| Agricultural fairs | <1% | 1% |
| Bars/nightlife | 1% | 1% |
| Animal parks/zoos | <1% | <1% |
| Summer camps | <1% | <1% |
| Horseback riding | <1% | <1% |
| Other | 12% | 14% |

WATER ACTIVITIES*

| Water Activities | 2022 | 2023 |
|-------------------------|------|------|
| Fishing | 4% | 3% |
| Going to the beach | 2% | 2% |
| Canoeing/kayaking | 1% | 1% |
| Outdoor swimming | 1% | 1% |
| Motor boating | 1% | 1% |
| Pool swimming | 1% | <1% |
| White water rafting | <1% | <1% |
| Sailing | <1% | <1% |
| Surfing | <1% | <1% |
| Water skiing/jet skiing | <1% | <1% |
| Other | 1% | <1% |

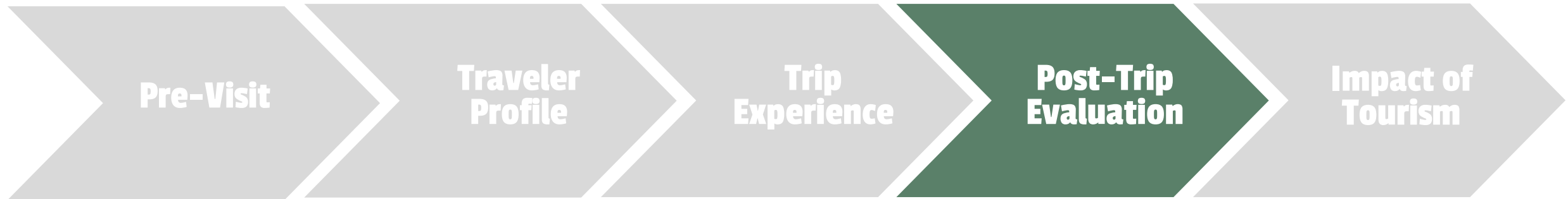
OTHER STATES/PROVINCES VISITED*

| Other States/Provinces Visited | 2022 | 2023 |
|--------------------------------|------|------|
| No other states/provinces | 78% | 73% |
| New Hampshire | 12% | 16% |
| Massachusetts | 9% | 11% |
| Vermont | 3% | 3% |
| Connecticut | 2% | 2% |
| New York | 3% | 2% |
| Rhode Island | 2% | 2% |
| New Brunswick | 1% | 1% |
| Nova Scotia | 1% | 1% |
| Quebec | 1% | 1% |
| Newfoundland and Labrador | <1% | <1% |
| Ontario | <1% | <1% |
| Prince Edward Island | <1% | <1% |
| Other | 1% | 1% |

TRAVELING IN MAINE*

| Maine Regions Visited | 2022 | 2023 |
|------------------------------|------|------|
| No other regions | 58% | 53% |
| Midcoast & Islands | 27% | 45% |
| Greater Portland & Casco Bay | 24% | 33% |
| The Maine Highlands | 19% | 21% |
| Kennebec Valley | 19% | 16% |
| The Maine Beaches | 18% | 15% |
| Maine Lakes & Mountains | 14% | 12% |
| Downeast & Acadia | 11% | 12% |
| Aroostook County | 8% | 9% |
| Other | 0% | 0% |

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

| Recommending Maine | 2022 | 2023 |
|---------------------------|------|------|
| Would recommend Maine | 97% | 97% |
| Would not recommend Maine | 1% | 1% |
| Not sure | 2% | 2% |

| Recommending Regions | 2022 | 2023 |
|---------------------------------|------|------|
| Definitely recommend region | 84% | 64% |
| Probably would recommend region | 13% | 34% |
| Would not recommend region | 0% | 0% |
| Not sure | 3% | 2% |

RETURNING TO MAINE

| Returning to Maine | 2022 | 2023 |
|--------------------------|------|------|
| Definitely will return | 81% | 72% |
| Probably will return | 14% | 23% |
| Probably will not return | 1% | 0% |
| Not sure | 4% | 5% |

SATISFACTION

| Satisfaction | 2022* | 2023 |
|----------------|-------|------|
| Very satisfied | NA | 41% |
| Satisfied | NA | 58% |
| Dissatisfied | NA | 0% |
| Don't know | NA | 1% |

*The satisfaction question was not included until Summer 2022.

TRIP EXPECTATIONS

| Exceeded Expectations | 2022 | 2023 |
|--------------------------------|------|------|
| Activities & attractions | 52% | 54% |
| Lodging | 41% | 40% |
| Friendliness of people | 46% | 39% |
| Authentic & unique communities | 29% | 27% |
| Customer service | 29% | 27% |
| Restaurants | 28% | 25% |
| Shopping | 25% | 25% |
| Value for your money | 27% | 23% |

OVERCROWDING*

| Overcrowding | 2022 | 2023 |
|---------------------------------|------|------|
| Overcrowded | NA | 1% |
| A little overcrowded | NA | 13% |
| The number of visitors was fine | NA | 65% |
| Not at all overcrowded | NA | 20% |
| Other | NA | 1% |

*Overcrowding question was not included until Summer 2022.

STUDY METHODS



METHODOLOGY



Visitor Tracking

1,134 interviews were completed with visitors to the state of Maine online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2022 and April 30th, 2023.

MAINE OFFICE OF TOURISM

2023 Winter Visitor Tracking Report

DECEMBER 2022 – APRIL 2023

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