

GREATER PORTLAND & CASCO BAY

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022



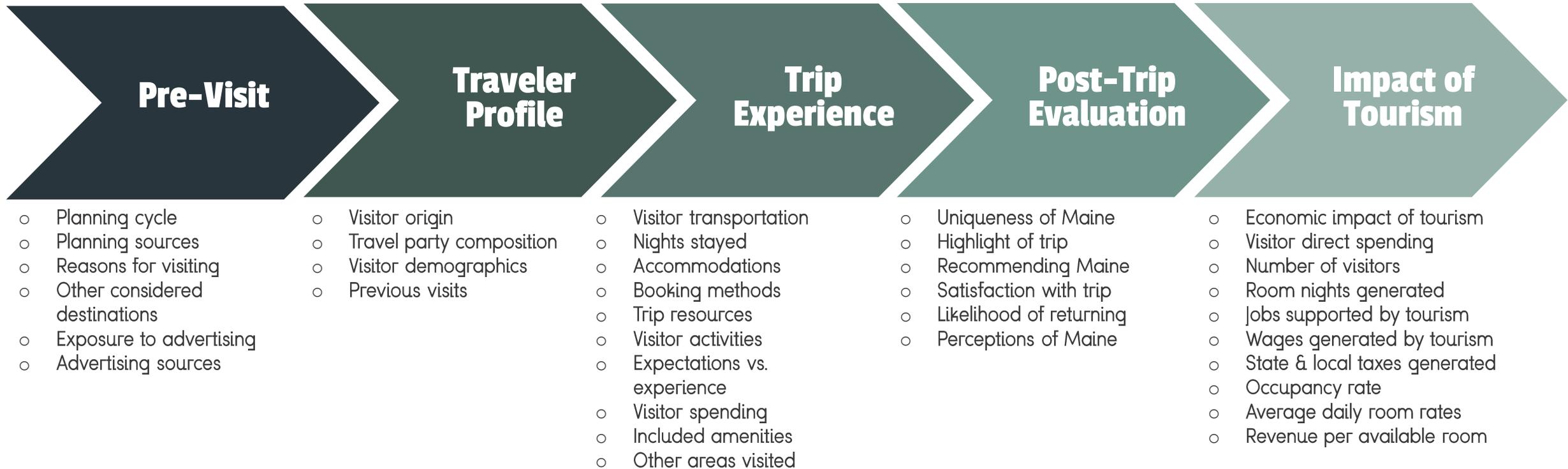
INTRODUCTION



STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Greater Portland & Casco Bay from December 2021 to November 2022.

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 Greater Portland & Casco Bay.



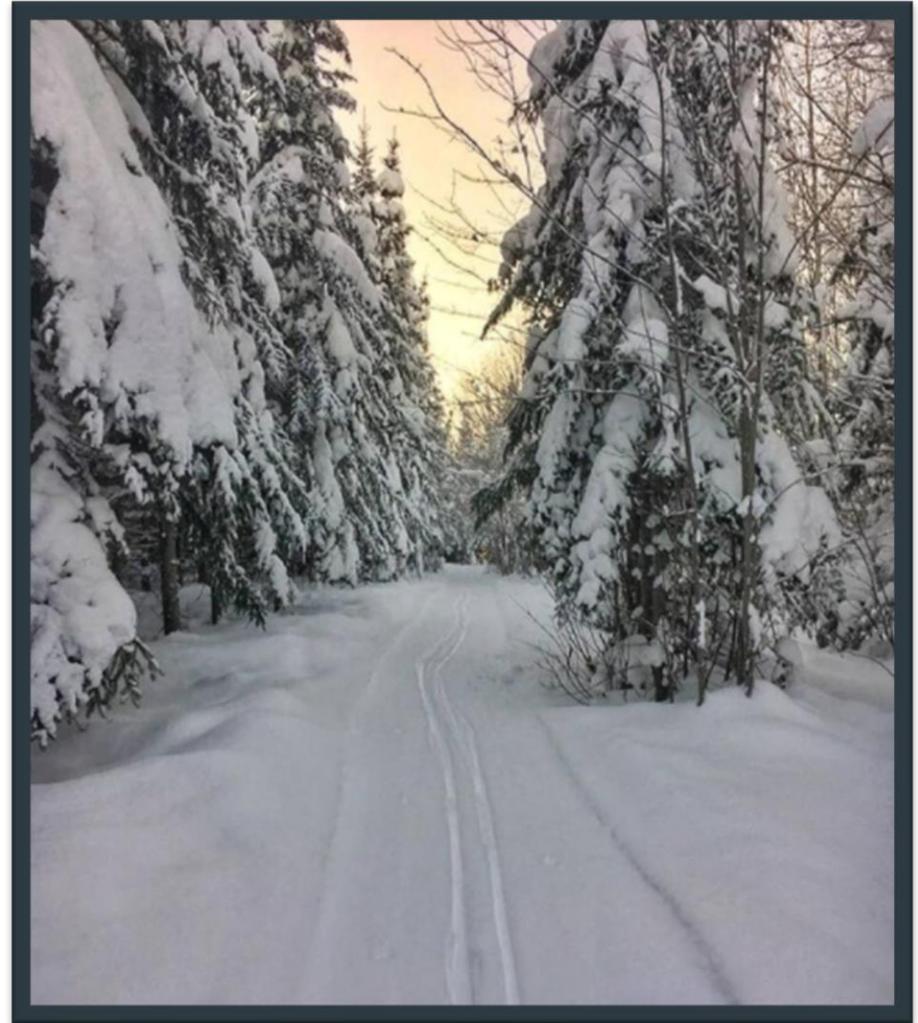
EXECUTIVE SUMMARY



GREATER PORTLAND & CASCO BAY

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

- » Notice and be influenced by advertising about Maine prior to their trip
- » Travel as a couple
- » Use navigation or restaurant website/apps while in Maine



TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$2,411,969,300

in economic impact to Greater Portland & Casco Bay's economy, up **+17.6%** from 2021



DIRECT SPENDING

Visitors to Greater Portland & Casco Bay spent

\$1,369,395,400

throughout the county in 2022 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up **+17.8%** from 2021

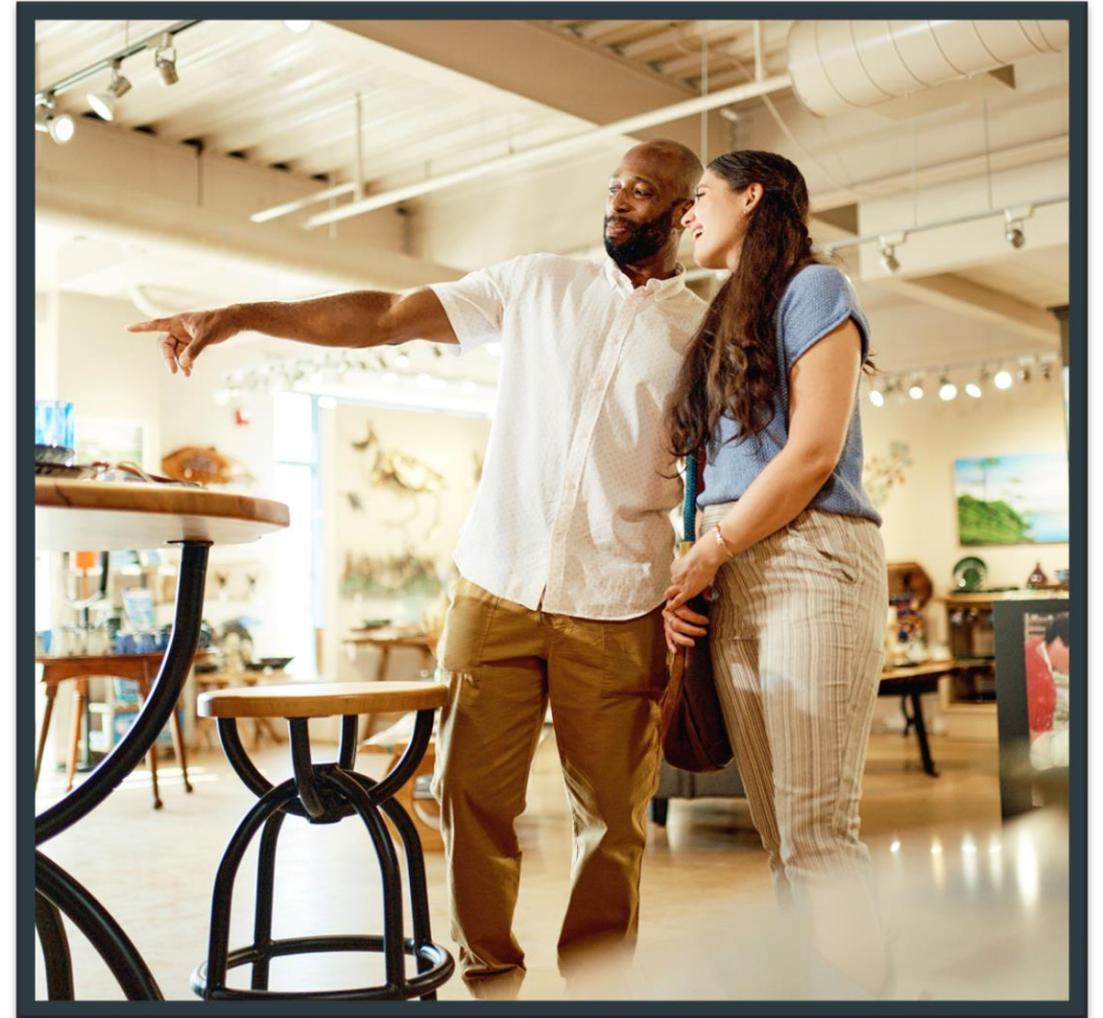


VISITORS

Greater Portland & Casco Bay attracted

2,541,800

visitors in 2022, up **3.3%** from 2021



ROOM NIGHTS

Visitors to Greater Portland & Casco Bay spent

2,351,400

nights in Greater Portland & Casco Bay accommodations throughout 2022, up **44.4%** from 2021



JOBS SUPPORTED

Visitors to Greater Portland & Casco Bay supported the creation of

23,400

jobs throughout the county in 2022, up
22.5% from 2021

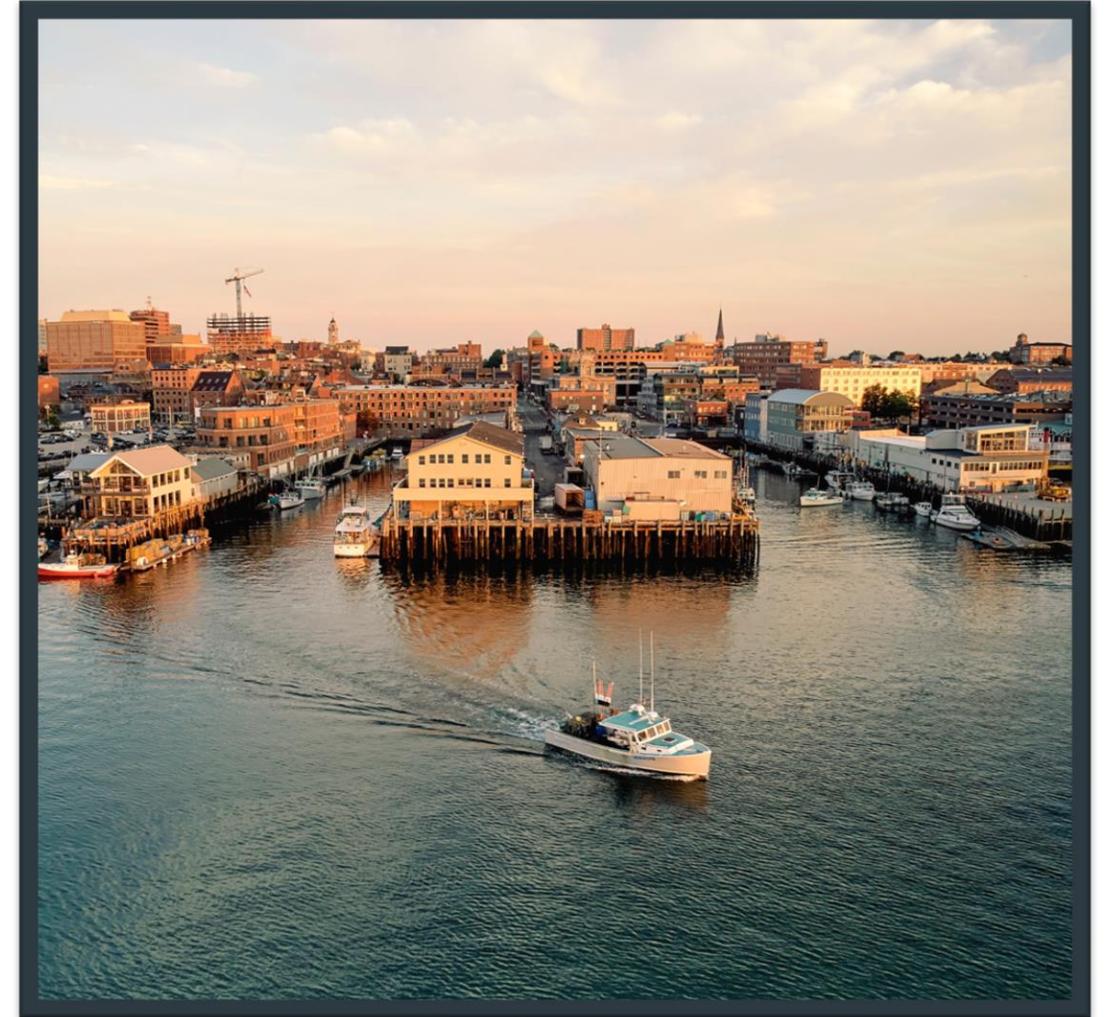


WAGES GENERATED

Visitors to Greater Portland & Casco Bay supported

\$948,499,000

in wages paid to Greater Portland & Casco Bay employees in 2022, up **23.9%** from 2021



VISITORS & JOBS

Every

109

visitors supports a new job in Greater Portland
& Casco Bay



HOUSEHOLD SAVINGS

Visitors to Greater Portland & Casco Bay
saved local households

\$1,807

in state and local taxes in 2022



LODGING METRICS

Occupancy Rate

60.0%

+ 17.6% from 2021

Average Daily Rate

\$208.91

+ 13.0% from 2021

Revenue per Available Room

\$125.35

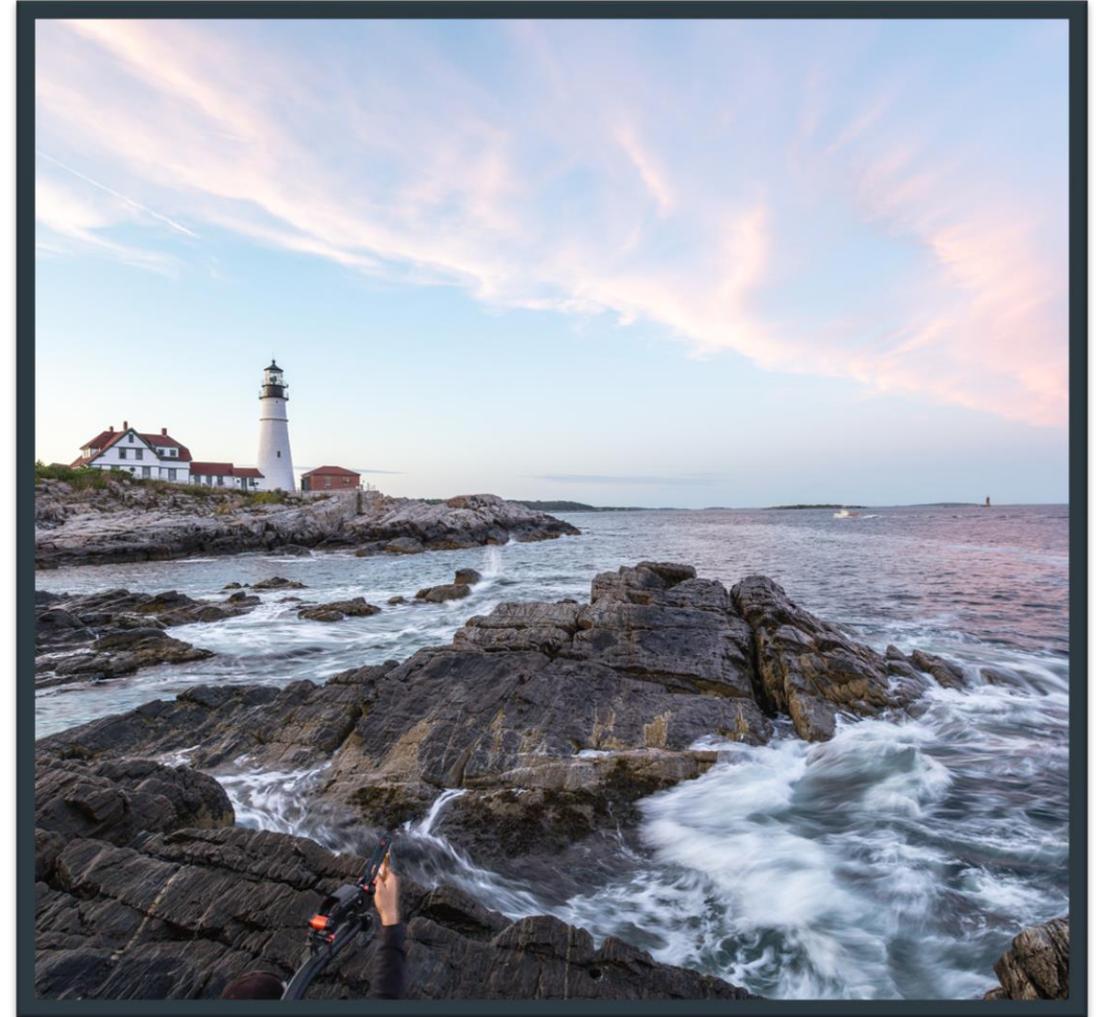
+ 33.0% from 2021

TRIP PLANNING CYCLE : PRE-VISIT



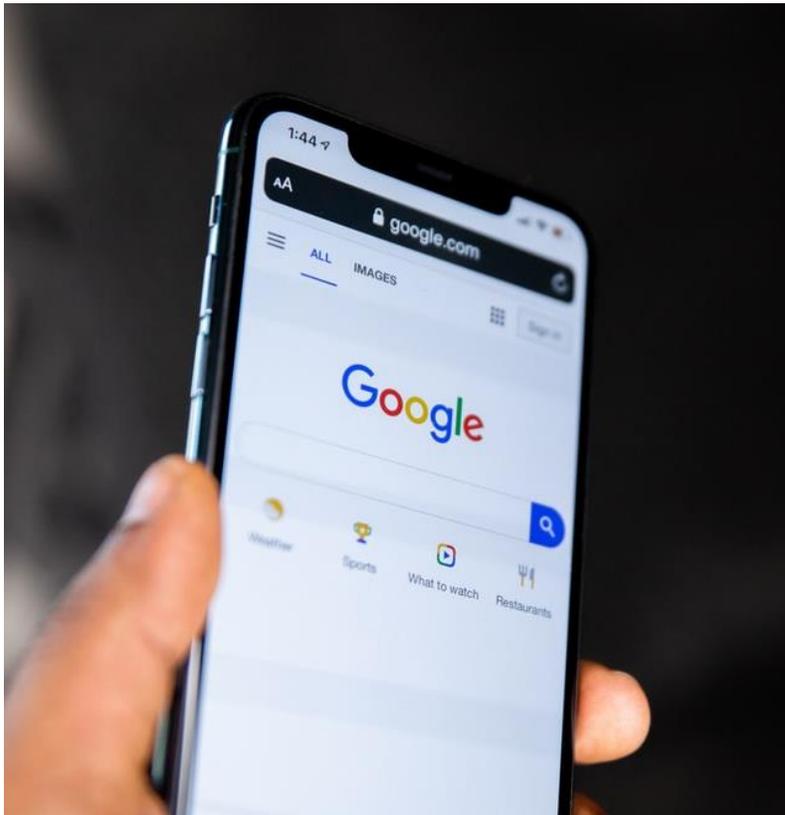
TRIP PLANNING CYCLE

- » **76%** of visitors started planning their trip a month or more in advance of their trip
- » **62%** visitors have a booking window of less than 3 months



TOP ONLINE TRIP PLANNING SOURCES*

Over **4 in 5** visitors used one or more online resources to help them plan their trip in Greater Portland & Casco Bay



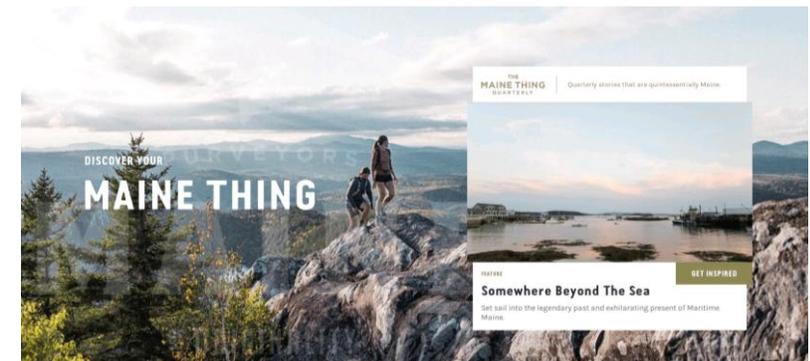
42% Online search engines



19% Traveler reviews/blogs/stories



18% Hotel websites



15% VisitMaine.com

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



40% Advice from friends/family



27% Articles or travelogues



18% AAA

*Multiple responses permitted.

TOP REASONS FOR VISITING*



26% Visiting friends/family



26% Sightseeing/touring



26% Relax and unwind

*Multiple responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » **57%** (-10% points from 2021) of visitors did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip
- » As other destinations and international borders opened for visitation, potential visitors now have many more destination options to choose from



PRE-TRIP EXPOSURE TO ADVERTISING

- » **63%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to Greater Portland & Casco Bay (+**25%** points from 2021)
- » This information influenced **44%** of all visitors to visit Maine



TOP SOURCES OF ADVERTISING EXPOSURE*



43% Social media



40% Internet



26% Magazine

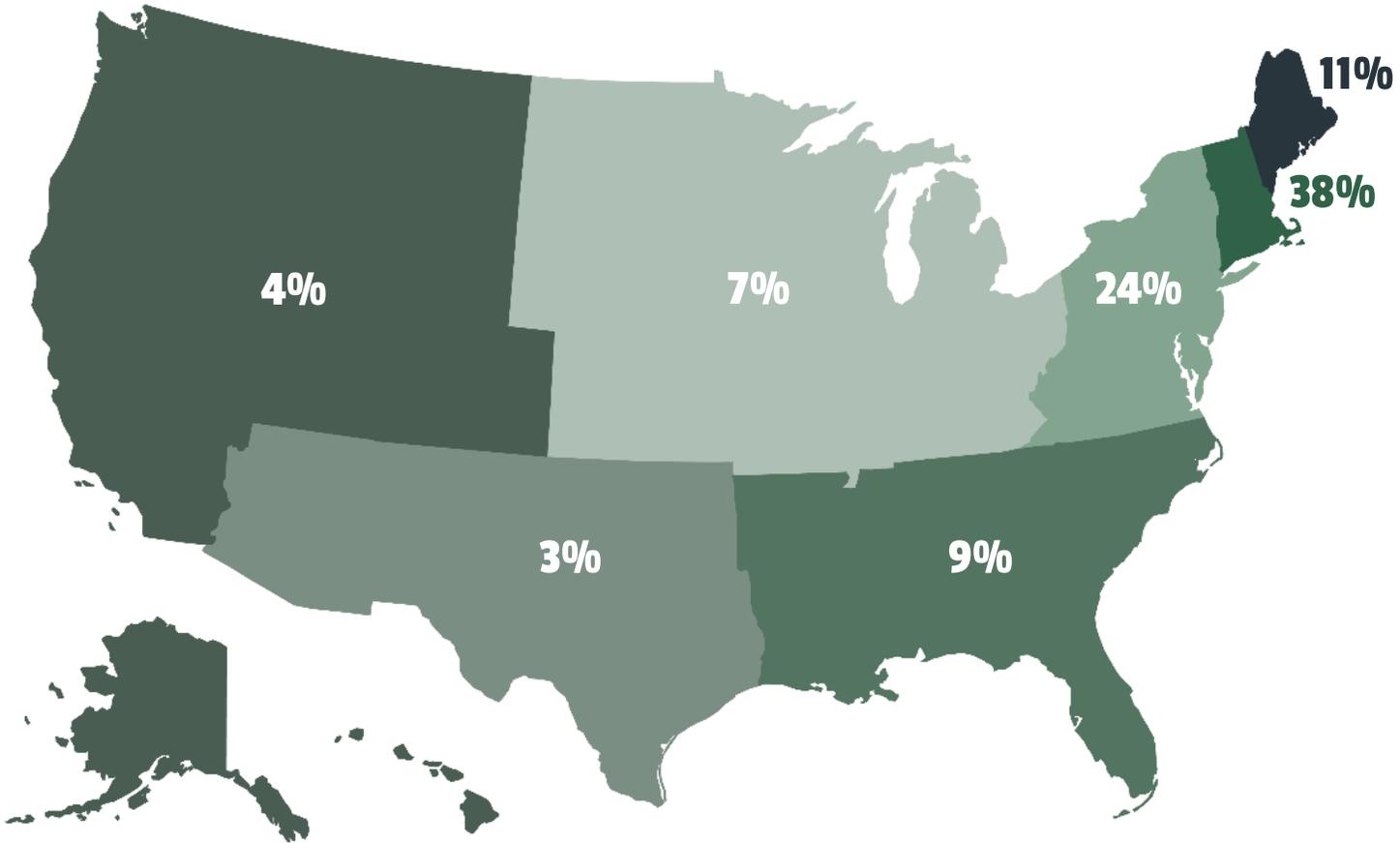
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TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN

International travel is rebounding as international visitation increased **+3% points** from 2021

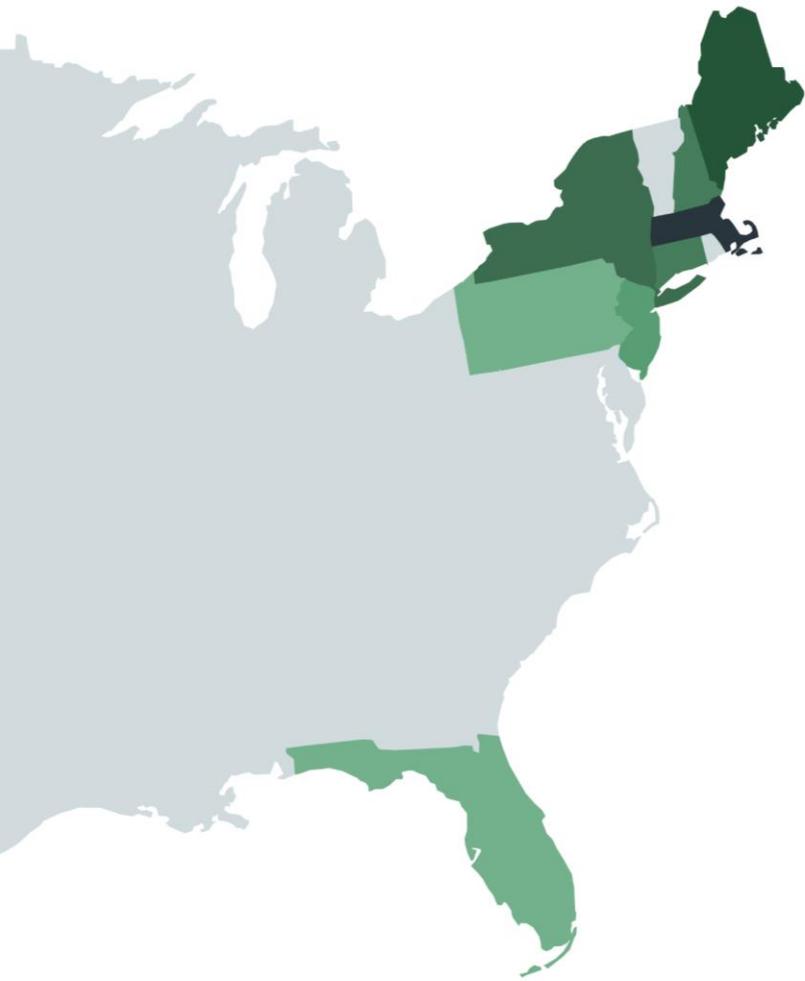


1% of visitors came from outside of the United States and Canada.



3% of visitors came Canada.

TOP ORIGIN STATES & PROVINCES



66%

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

- | | |
|---------------------------|--------------------------|
| 18 % Massachusetts | 7 % New Hampshire |
| 11 % Maine | 6 % New Jersey |
| 9 % New York | 4 % Florida |
| 7 % Connecticut | 4 % Pennsylvania |

TOP ORIGIN MARKETS



11% New York City¹



11% Boston



4% Washington D.C. - Baltimore²

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

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

TRAVEL PARTIES

The typical Greater Portland & Casco Bay visitor traveled with **2.4** people in their visitor party

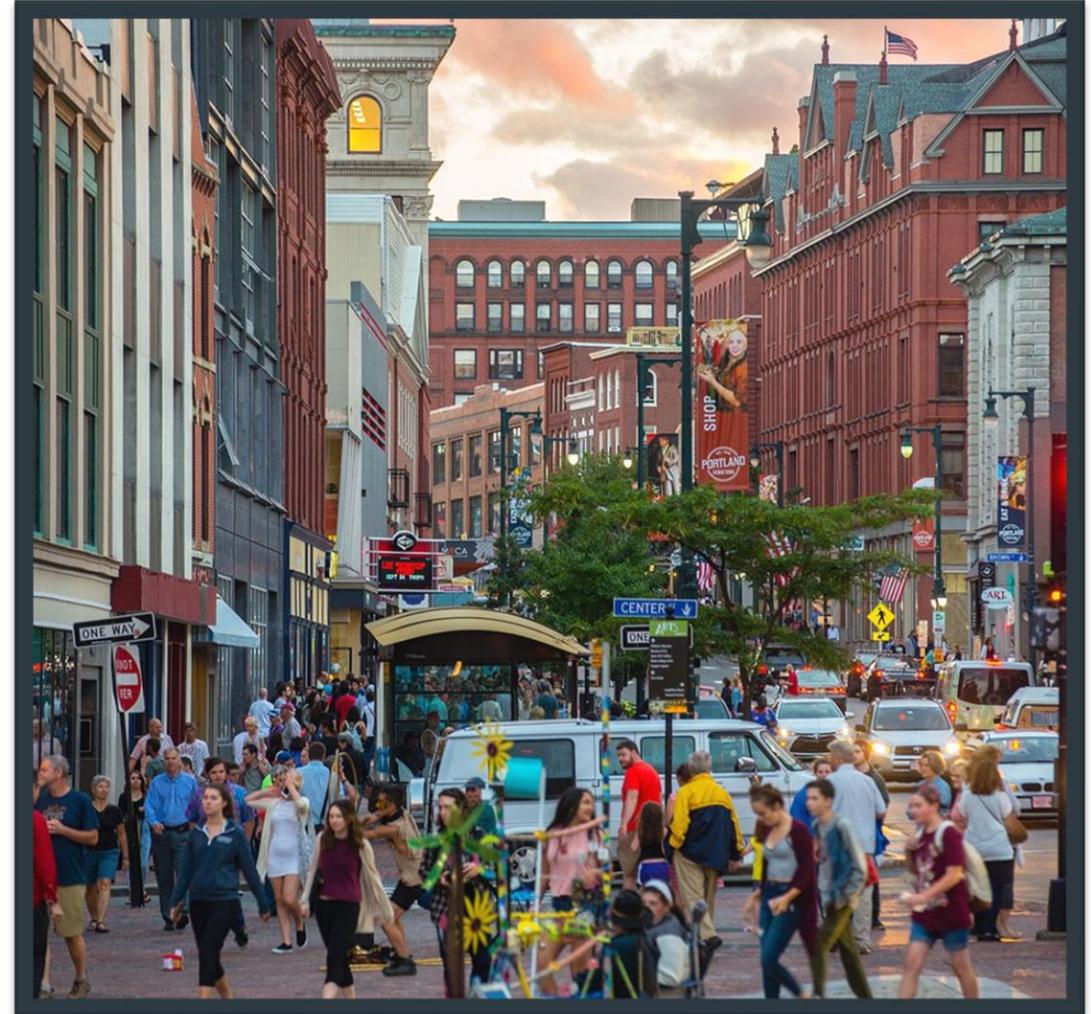


13% visitors traveled with at least one person under the age of 18 in their travel party



DEMOGRAPHIC PROFILE

- » The typical Greater Portland & Casco Bay visitor:
 - » Is **50** years old¹
 - » Female² - **61%**
 - » Is white - **84%**



¹Median age.

²Of visitors interviewed.

LIFESTYLE PROFILE

- » The typical Greater Portland & Casco Bay visitor:
 - » Is a college graduate - **84%**
 - » Is married/in a domestic partnership - **81%**
 - » Is employed full-time - **48%**
 - » Has an annual household income¹ of **\$88,800**



¹Median household income.

NEW & RETURNING VISITORS

- » **25%** of visitors to Greater Portland & Casco Bay were traveling in Maine for the first time
- » **22%** of visitors to Greater Portland & Casco Bay had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » **79%** of visitors drove to their Greater Portland & Casco Bay destination
- » **10%** of visitors to Greater Portland & Casco Bay flew to Maine through Portland International Jetport



NIGHTS STAYED

- » **81%** of visitors spent one or more nights in Greater Portland & Casco Bay
- » Typical visitors stayed **4.6*** nights in Greater Portland & Casco Bay on their trip



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

TOP ACCOMMODATIONS



26% Hotel/motel/resort



22% Friends/family home



19% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*

Over **9 in 10** visitors used one or more in-market resources to help them plan places to go while in Greater Portland & Casco Bay



62% Navigation websites/apps



53% Restaurant website/app



33% Personal social media

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



75% Food/beverage/ culinary



59% Shopping

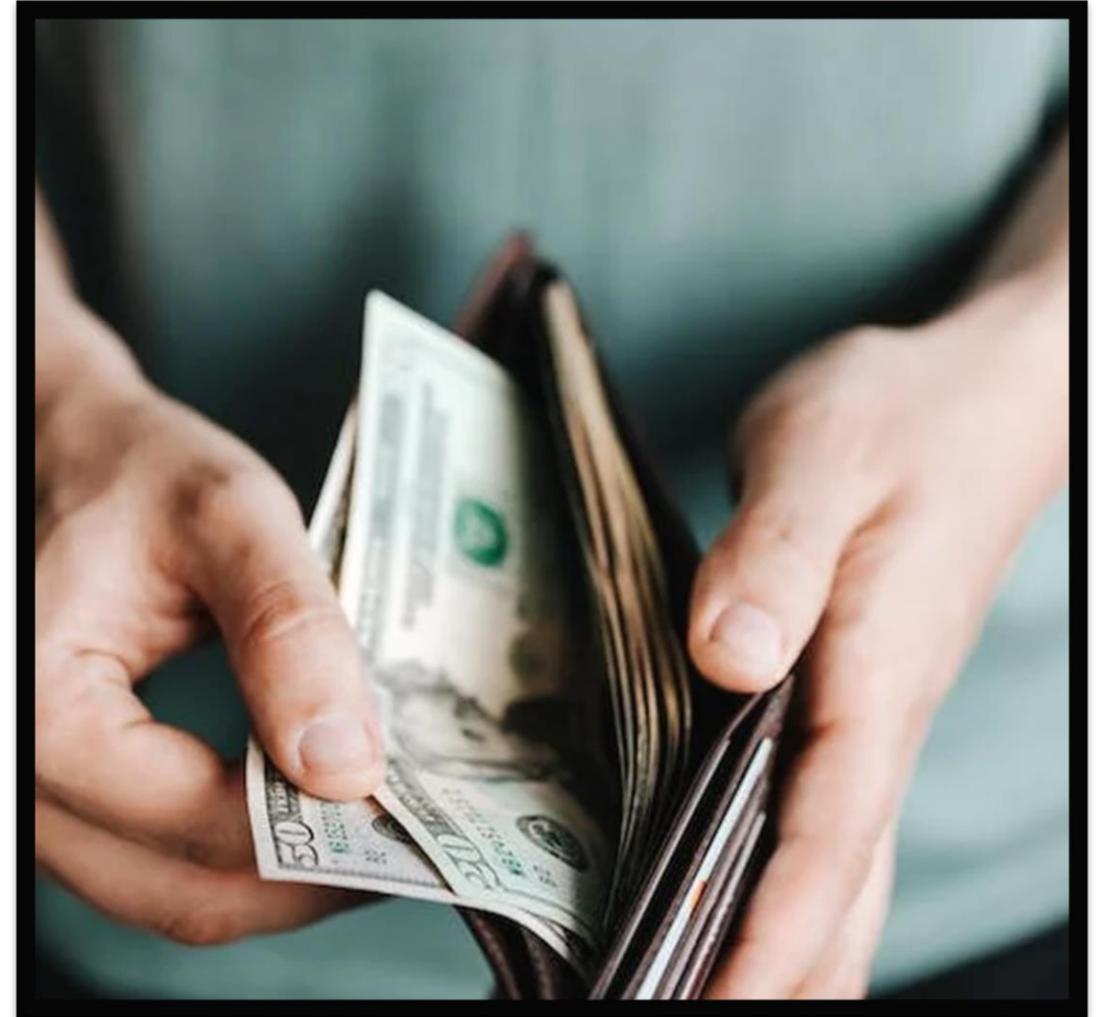


51% Touring/sightseeing

*Multiple responses permitted.

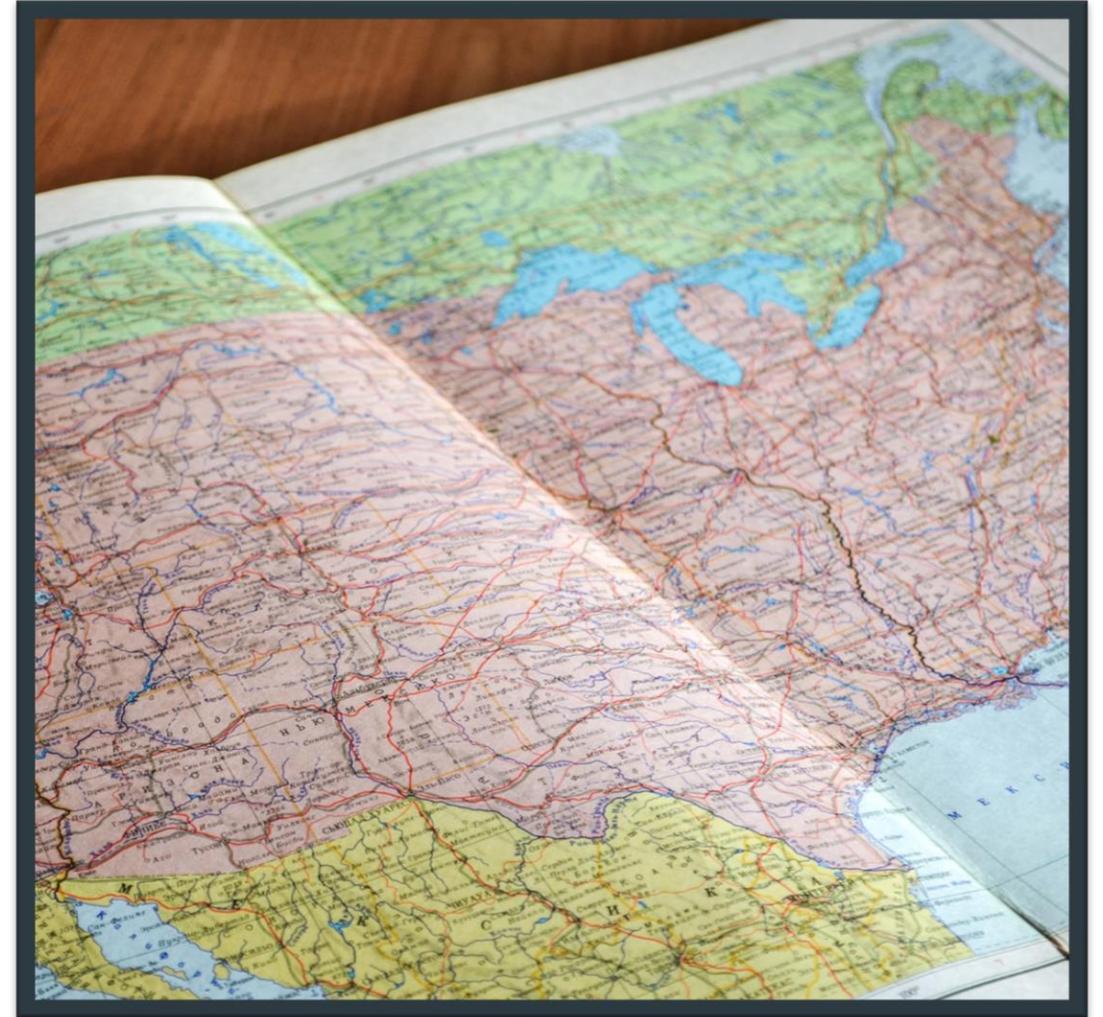
TRAVEL PARTY SPENDING

- » Visitors who stayed overnight in paid accommodations in Greater Portland & Casco Bay spent **\$658** per day and **\$3,034** during their trip
- » Visitors who stayed overnight in unpaid accommodations in Greater Portland & Casco Bay spent **\$281** per day and **\$1,879** during their trip
- » Visitors who did not stay overnight in Greater Portland & Casco Bay spent **\$258** during their trip



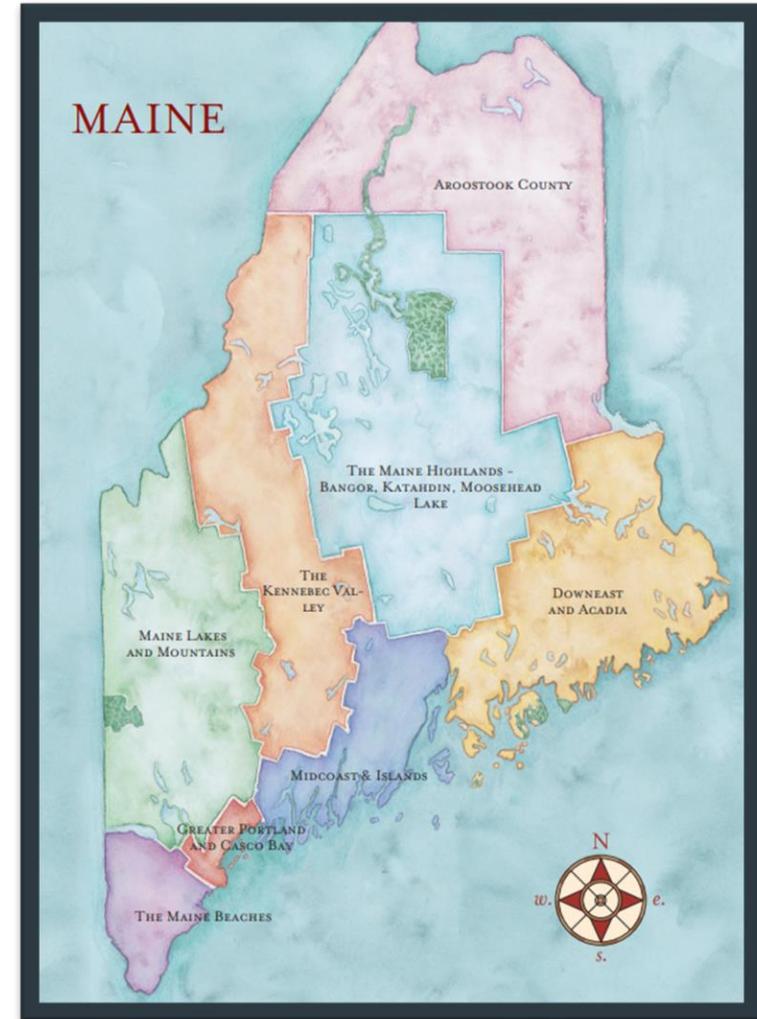
VISITING OTHER STATES & PROVINCES

- » Nearly **3 in 5** visitors to Greater Portland & Casco Bay did not visit any other U.S. state or Canadian province
- » Greater Portland & Casco Bay 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

» About **9 in 10** visitors to Greater Portland & Casco Bay traveled to other regions during their trips to Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **97%** of visitors to Greater Portland & Casco Bay would recommend Maine to a friend or relative as a vacation destination
- » **97%** of visitors to Greater Portland & Casco Bay would recommend that their friends and family visit the region
 - » **62%** would definitely recommend Greater Portland & Casco Bay



LIKELIHOOD OF RETURNING TO MAINE

- » **84%** of visitors to Greater Portland & Casco Bay will return to Maine for a future visit or vacation
- » **57%** of visitors will “definitely return” to Maine in the future



SATISFACTION

- » **98%** of visitors were satisfied with their trip to Greater Portland & Casco Bay
- » However, increased cost and the current lack of work force negatively affected visitors' trip experiences: **25%** of visitors said that the customer service did not meet their expectations and **16%** said the restaurants and value for their money did not meet their expectations



OVERCROWDING

- » **42%** of visitors thought the number of visitors during their trip to Greater Portland & Casco Bay was fine
- » **32%** of visitors though it was a little overcrowded



DETAILED FINDINGS



TRIP PLANNING CYCLE : PRE-VISIT



KEY PERFORMANCE INDICATORS

Economic Impact	2021	2022	Δ% from '21
Number of Visitors	2,460,000	2,541,800	+ 3.3%
Room nights generated	1,628,500	2,351,400	+ 44.4%
Direct expenditures	\$1,162,939,800	\$1,369,395,400	+ 17.8%
Total economic impact	\$2,051,063,000	\$2,411,969,300	+ 17.6%

EMPLOYMENT IMPACTS

Greater Portland & Casco Bay Jobs	2021	2022	Δ% from '21
Jobs generated (direct)	13,500	16,600	+ 23.0%
Total employment impact	19,100	23,400	+ 22.5%

Greater Portland & Casco Bay Wages	2021	2022	Δ% from '21
Wages paid (direct)	\$463,604,100	\$575,551,700	+ 24.1%
Total impact on wages	\$765,264,100	\$948,499,000	+ 23.9%

RETURN ON INVESTMENT

Return on Investment	2021	2022
Visitors per job supported	129	109
State & local taxes supported	\$147,883,200	\$182,107,000
Tax savings per household	\$1,972*	\$1,807*

*The estimate of households in the region was calculated differently in 2022 resulting in a different household savings estimate.

LODGING METRICS

Lodging Metrics	2021*	2022	Δ% from '21
Occupancy Rate (%)	51.0%	60.0%	+ 17.6%
Average Daily Rate	\$184.80	\$208.91	+ 13.0%
RevPAR	\$94.25	\$125.35	+ 33.0%
Total Lodging Revenue	\$302,098,800	\$396,805,700	+ 31.3%

*Calculation method was updated in 2022.
2021 metrics have been updated to reflect this change.

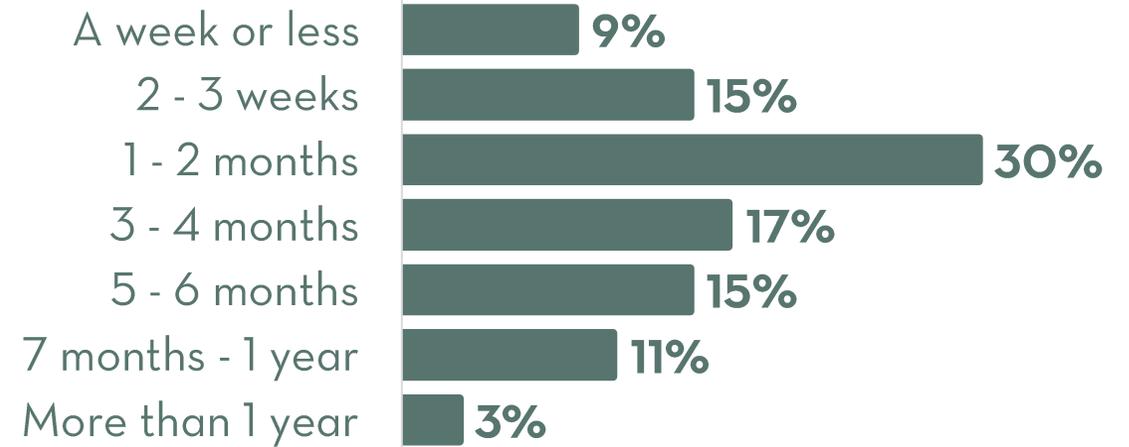
TRIP PLANNING CYCLE : PRE-VISIT



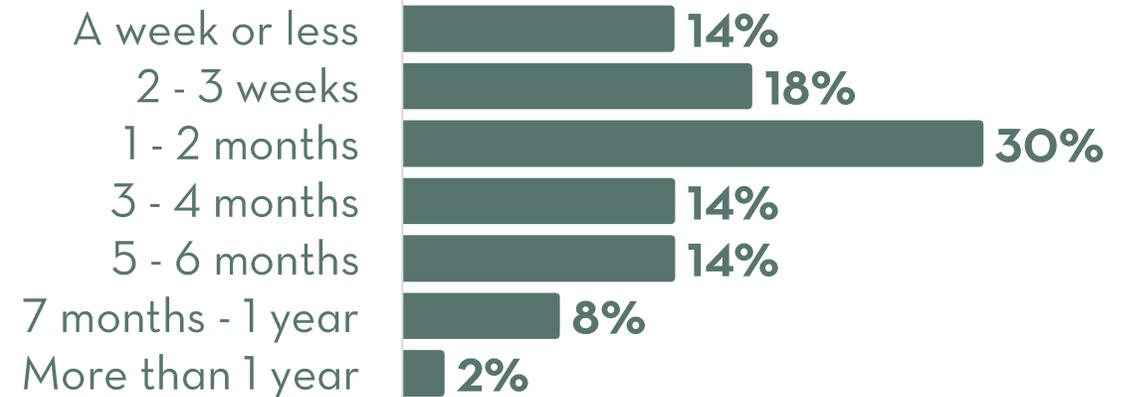
TRIP PLANNING CYCLE

- » Typical visitors to Greater Portland & Casco Bay began planning their trip **56 days** in advance (+2 days from 2021)
- » **76%** of visitors started planning their trip a month or more in advance of their trip
- » Typical visitors booked their accommodations **48 days** in advance (+3 days from 2021)
- » **62%** of visitors have a booking window of less than 3 months

Beginning of Trip Cycle

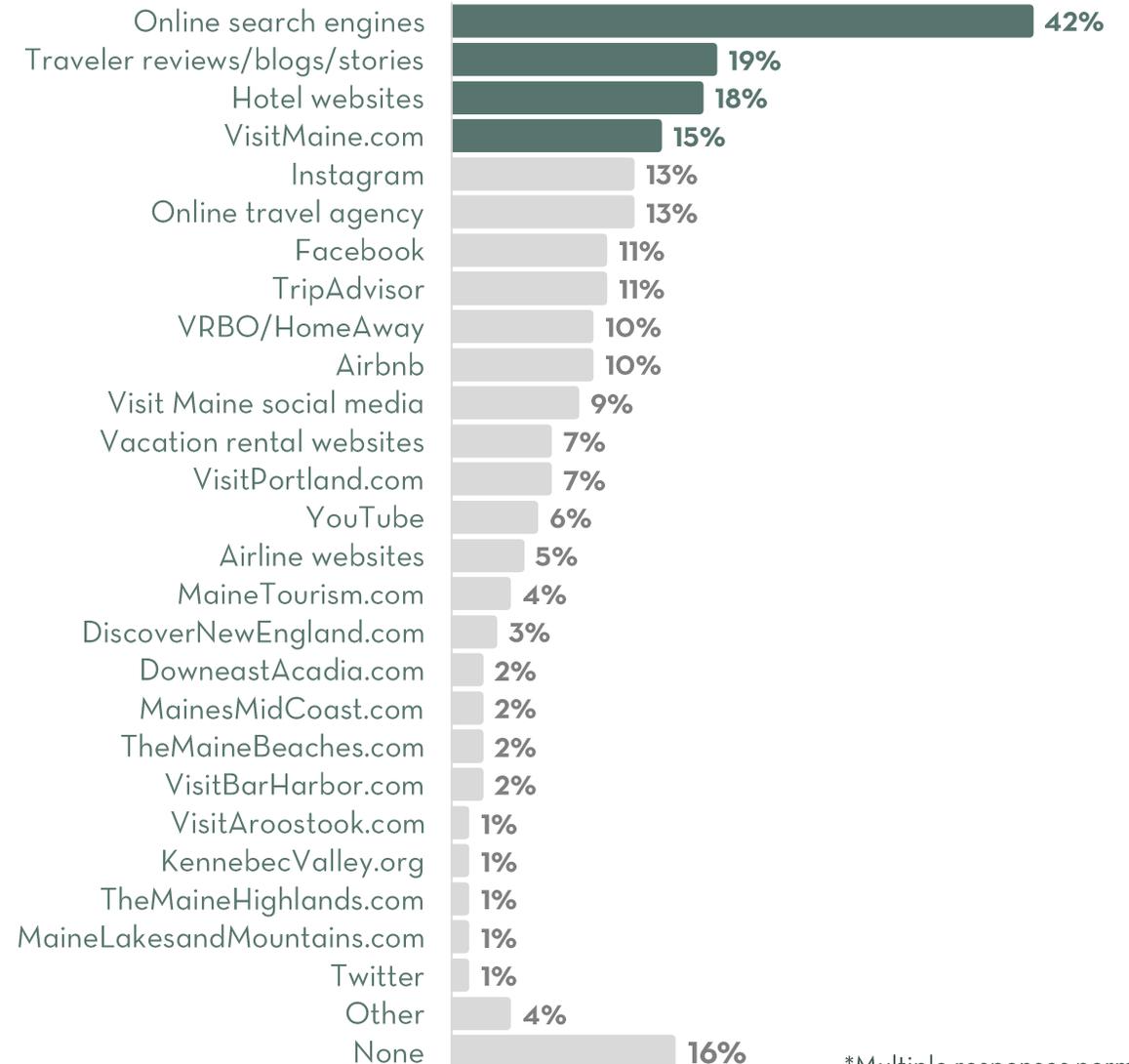


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

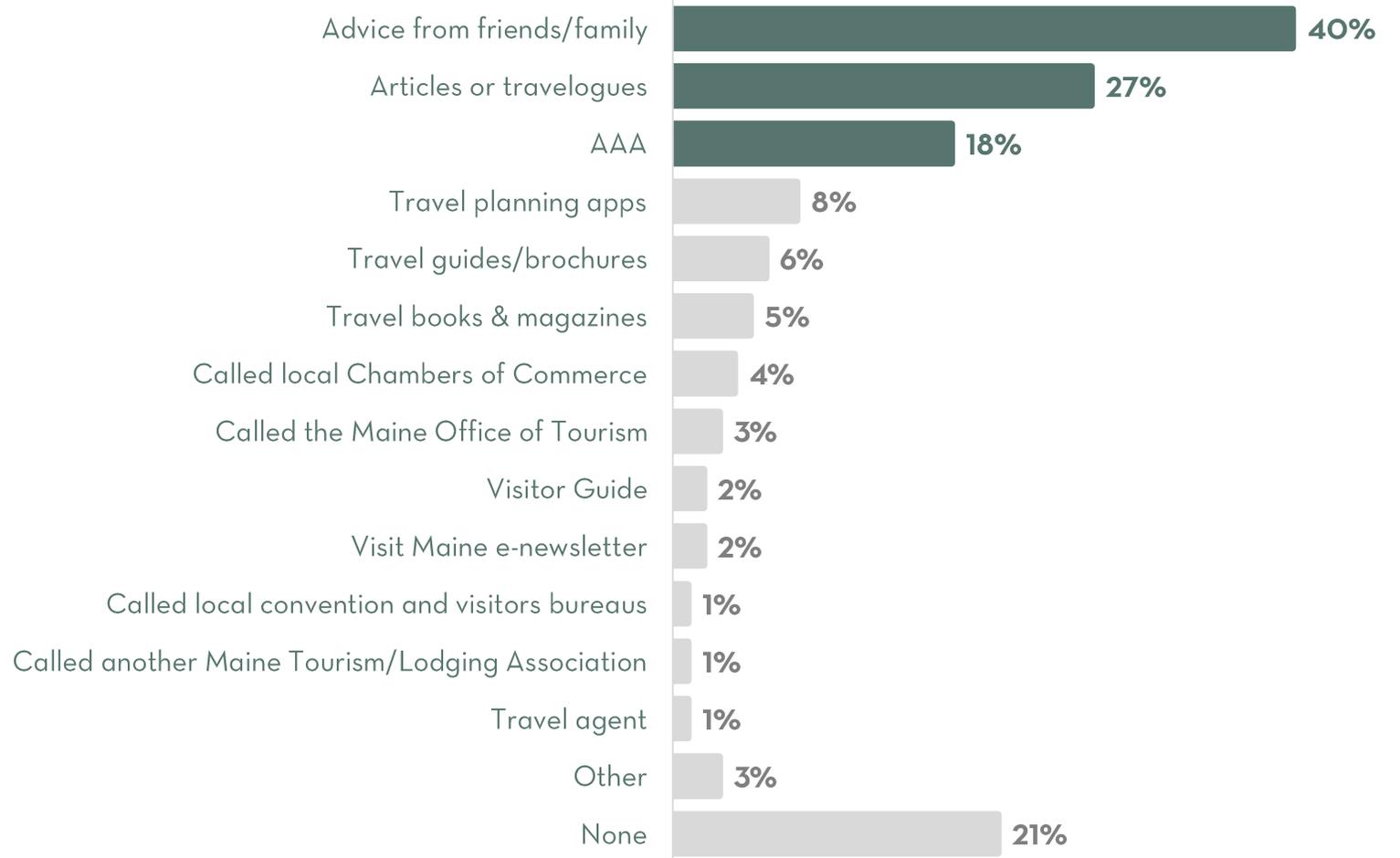
- » Over **4 in 5** visitors used one or more online resources to help them plan their trip to Greater Portland & Casco Bay
- » Over **2 in 5** visitors used an online search engine, such as Google, to help them plan their trip to Greater Portland & Casco Bay
- » Over **1 in 7** visitors used VisitMaine.com (+4% points from 2021)
- » More visitors used traveler reviews/blogs/stories (+10% points) compared to 2021



*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

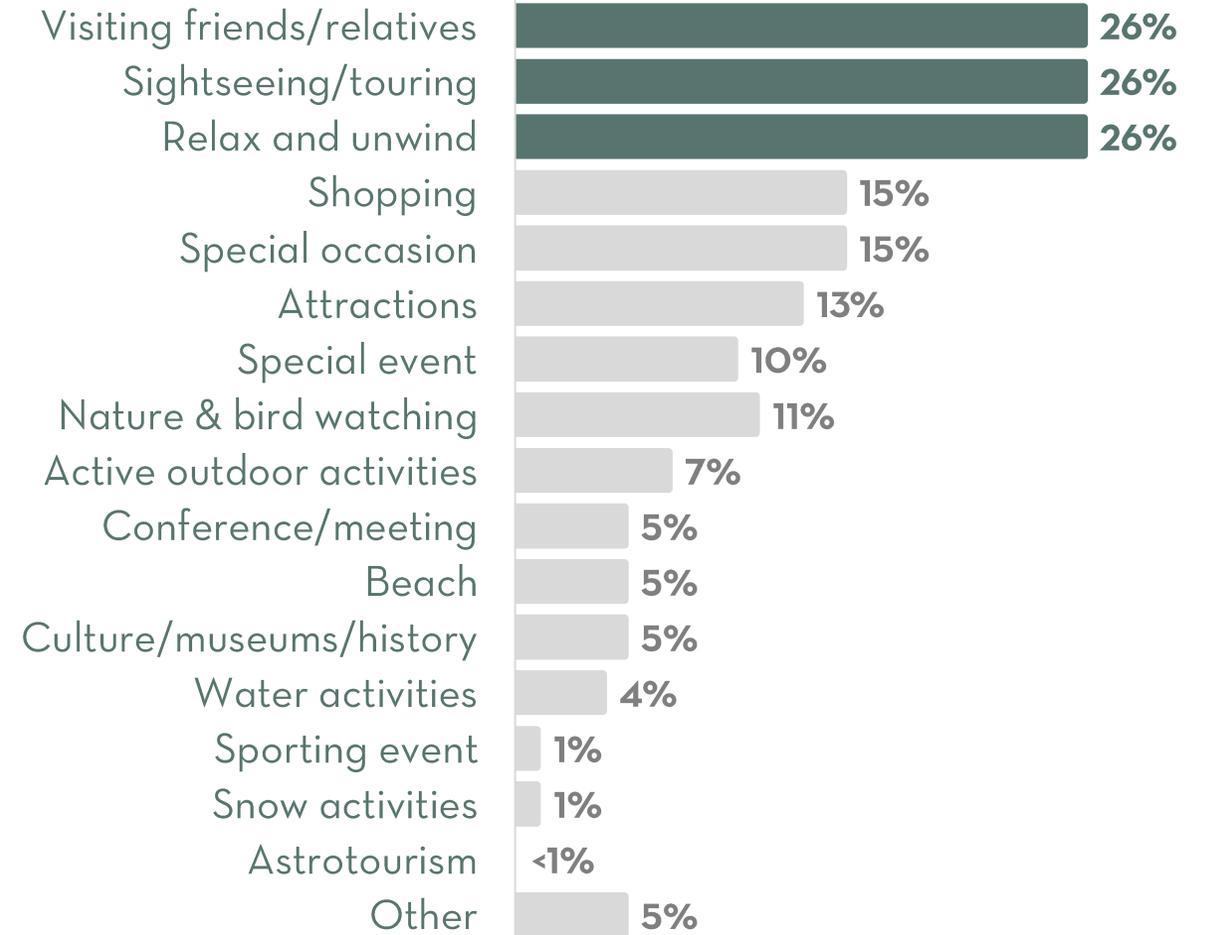
- » **2 in 5** visitors relied on advice from their friends and family to help them plan their trip to Greater Portland & Casco Bay
- » Over **1 in 4** visitors used articles or travelogues (+18% points from 2021), and nearly **1 in 5** used AAA (+11% points from 2021) to help plan their trip to Greater Portland & Casco Bay
- » Over **1 in 5** visitors did not use any other resources to help them plan their trip to Greater Portland & Casco Bay



*Multiple responses permitted.

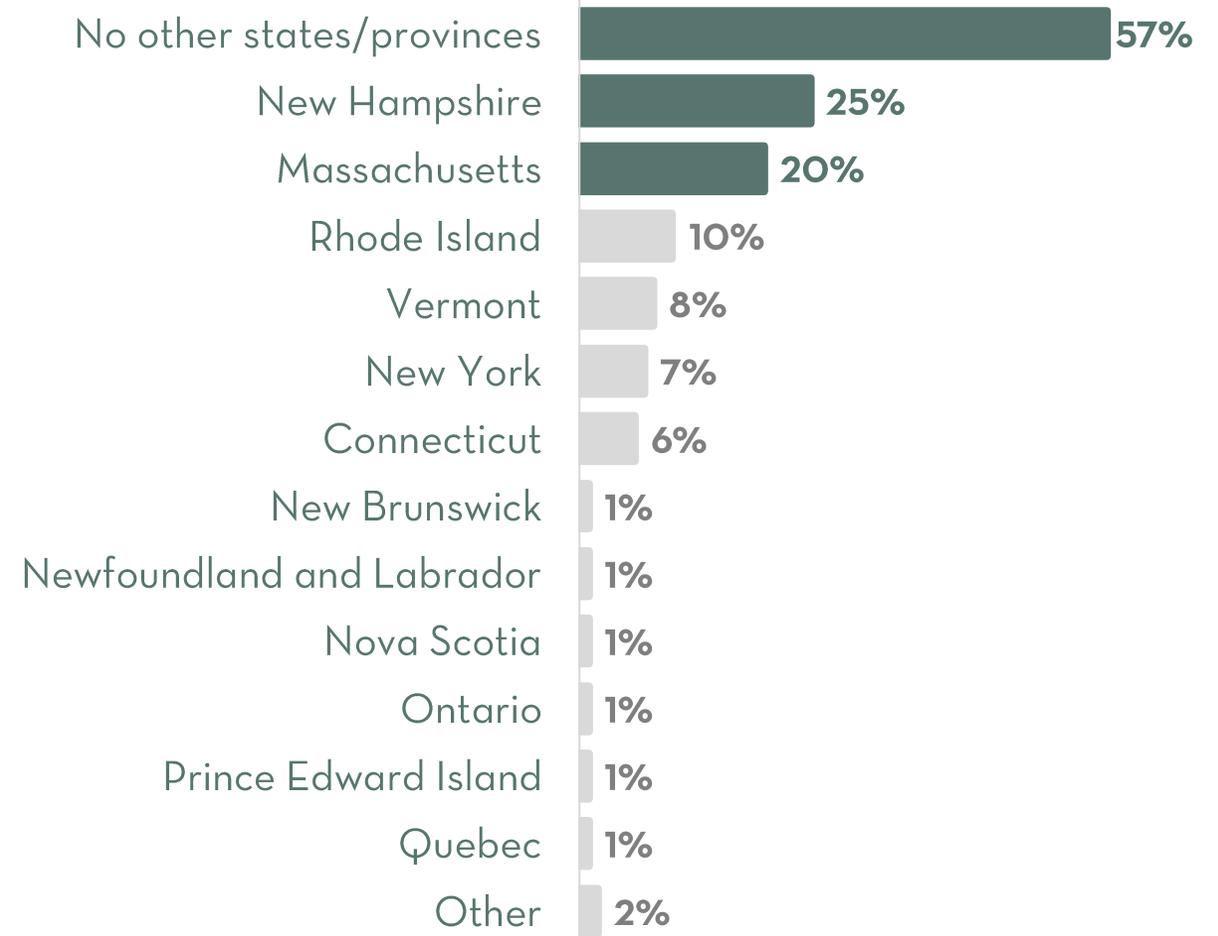
REASONS FOR VISITING*

» **1 in 4** visitors traveled to Greater Portland & Casco Bay to visit friend/relatives, to go sightseeing/touring, and to relax & unwind



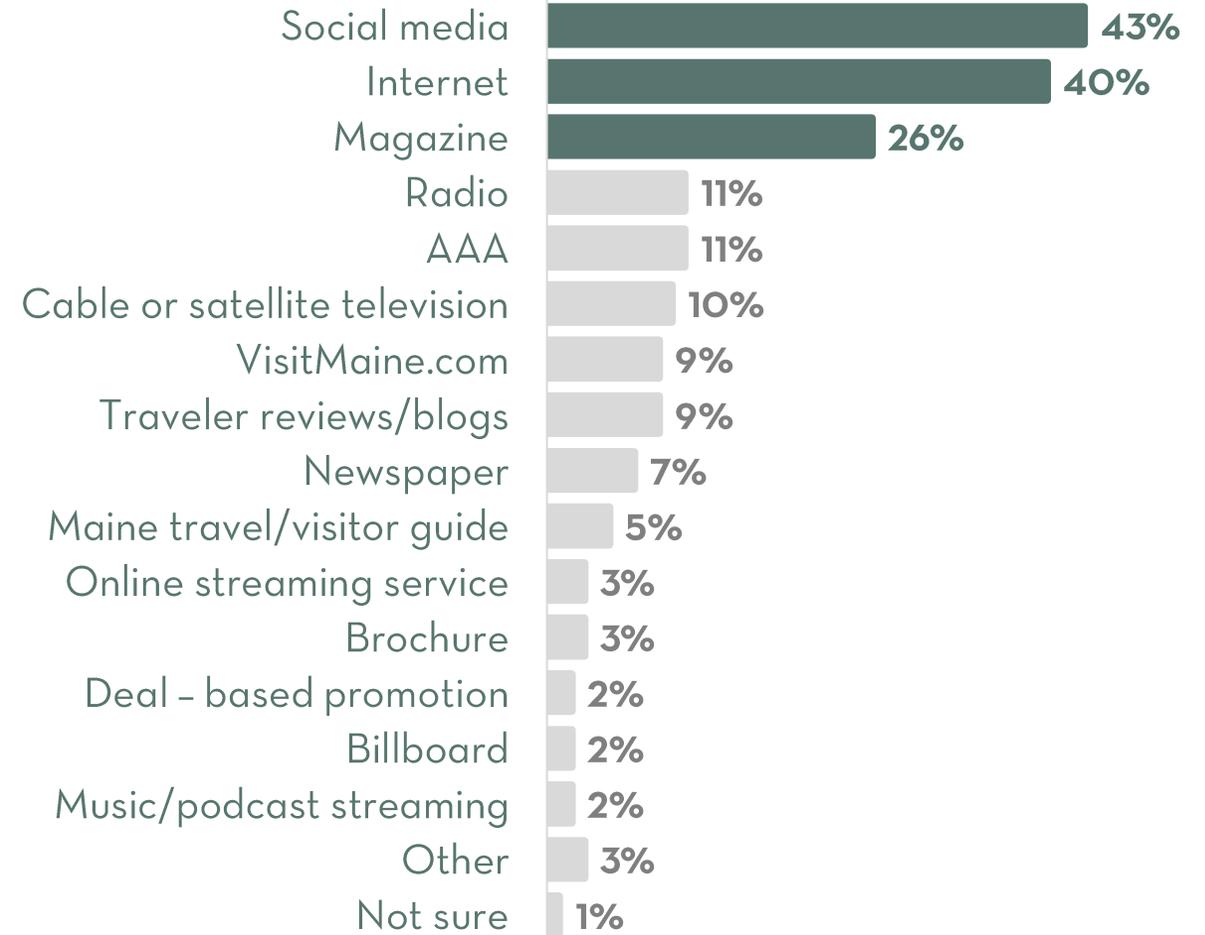
OTHER STATES & PROVINCES CONSIDERED*

- » **57%** (-10% points from 2021) of visitors considered visiting **only** Maine while planning their trips to Greater Portland & Casco Bay
- » Visitors to Greater Portland & Casco Bay were **more likely** to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

- » **63%** (+25% points from 2021) of visitors noticed advertising or promotions for Maine prior to their trip to Greater Portland & Casco Bay
- » Visitors who recalled this advertising primarily saw it on **social media** (+11% points from 2021) or the **internet**
- » This information influenced **44%** of all Greater Portland & Casco Bay visitors to visit Maine

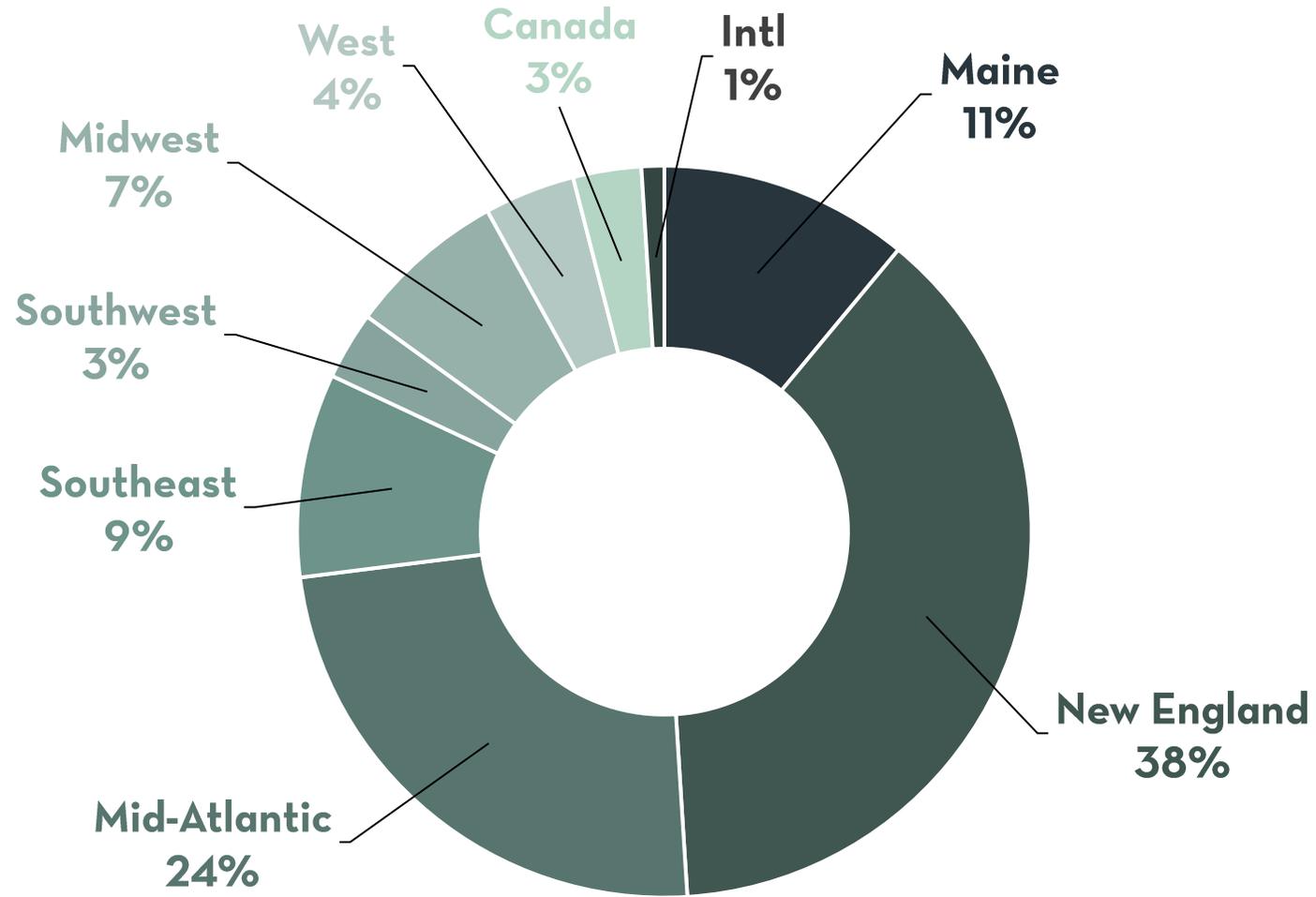


*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **82%** of visitors to Greater Portland & Casco Bay were from 15 U.S. states
- » **11%** of visitors were residents of Maine traveling throughout the state

State	Percent
Massachusetts	18%
Maine	11%
New York	9%
Connecticut	7%
New Hampshire	7%
New Jersey	6%
Florida	4%
Pennsylvania	4%
Maryland	3%
Virginia	3%
California	2%
Illinois	2%
Rhode Island	2%
Texas	2%
Vermont	2%

TOP ORIGIN MARKETS

- » Nearly **1 in 3** visitors to Greater Portland & Casco Bay traveled from **6** U.S. markets
- » **11%** of visitors traveled to Greater Portland & Casco Bay from New York City or Boston

Market	Percent
New York City ¹	11%
Boston	11%
Washington DC - Baltimore ²	4%
Philadelphia	2%
Providence, RI	2%
Brockton, MA	2%

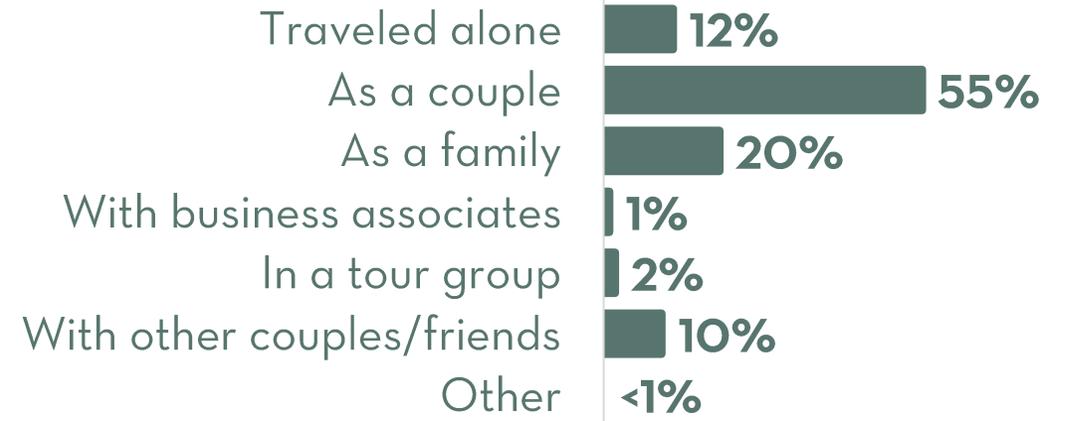
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

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

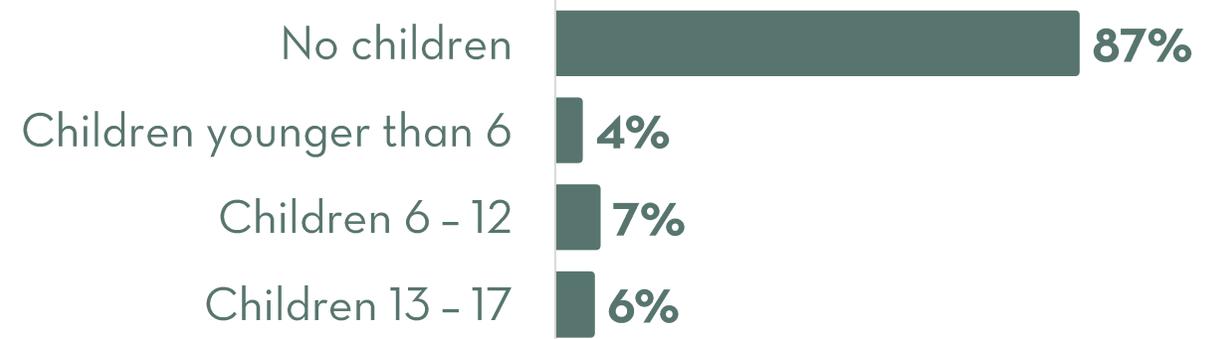
TRAVEL PARTIES

- » Typical visitors traveled to Greater Portland & Casco Bay in parties of **2.4** people
- » Over **half** of visitors traveled as a couple
- » **13%** of visitors traveled with one or more children in their travel party

Travel Party Composition



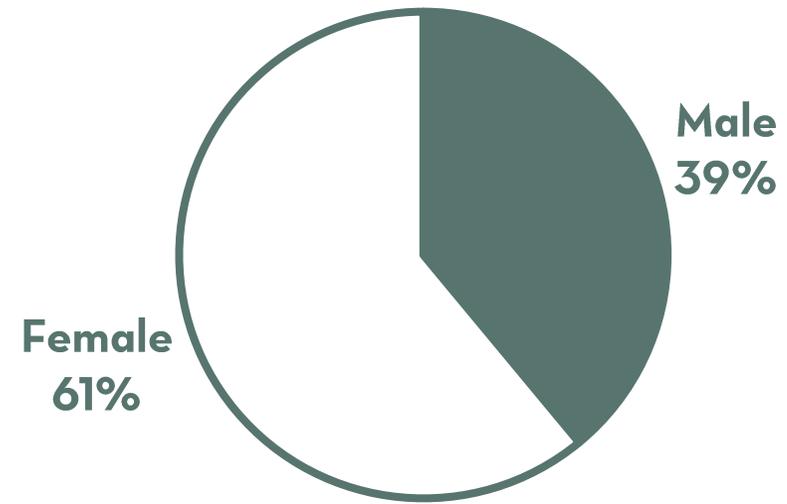
Children in Travel Party*



*Multiple responses permitted.

GENDER

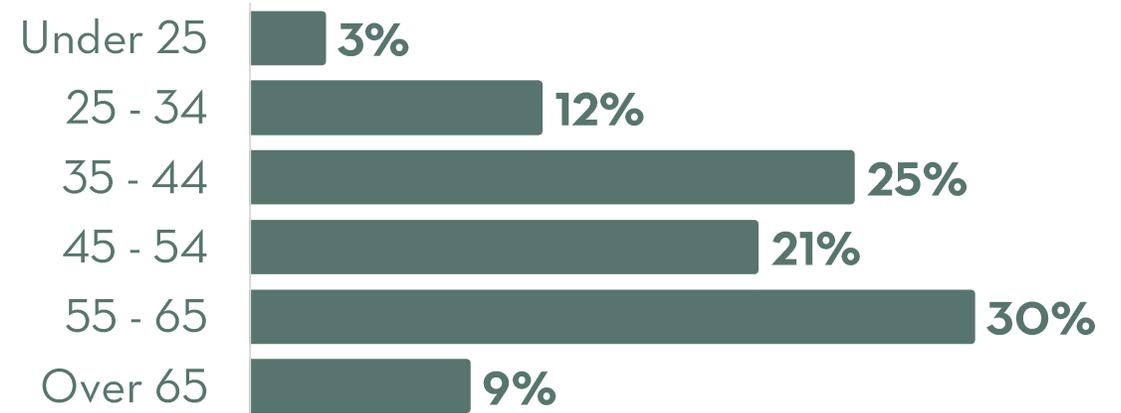
» Over **3 in 5** visitors to Greater Portland & Casco Bay interviewed were females



*Of visitors interviewed.

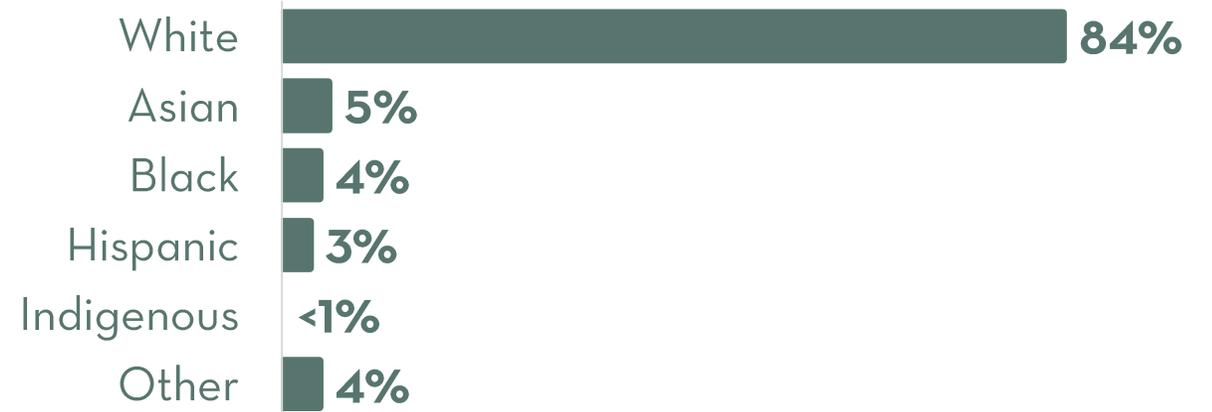
AGE

» The average age of visitors to Greater Portland & Casco Bay is **50** years old



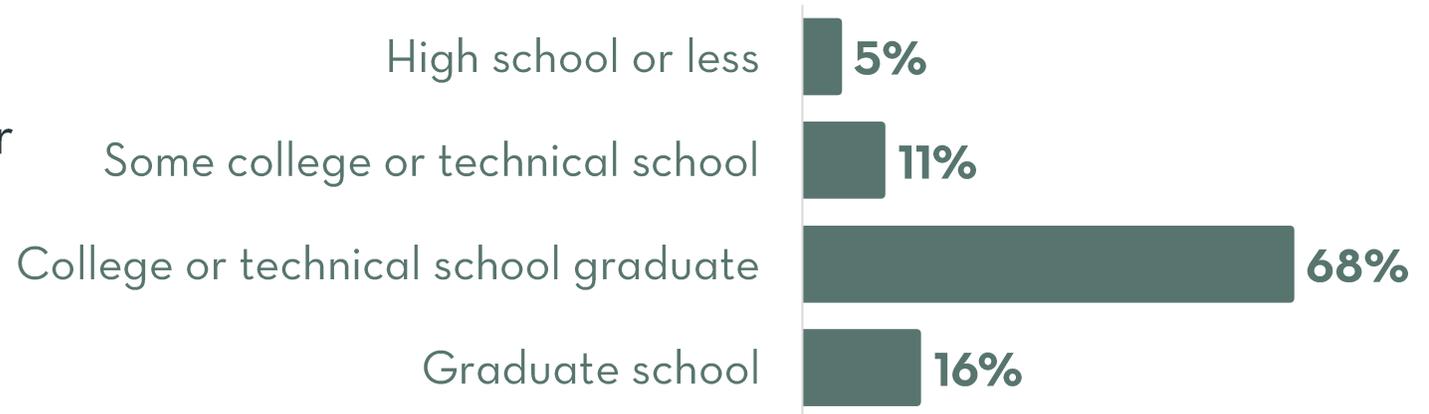
RACE & ETHNICITY

» Over **4 in 5** visitors to Greater Portland & Casco Bay were white



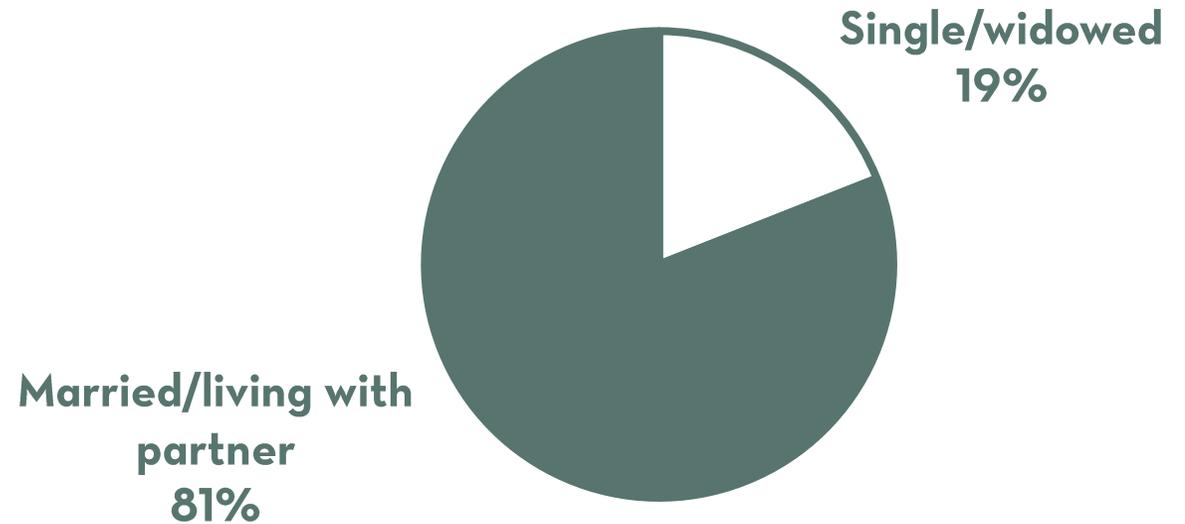
EDUCATIONAL ATTAINMENT

» Over **4 in 5** visitors to Greater Portland & Casco Bay have a college/technical school degree or higher



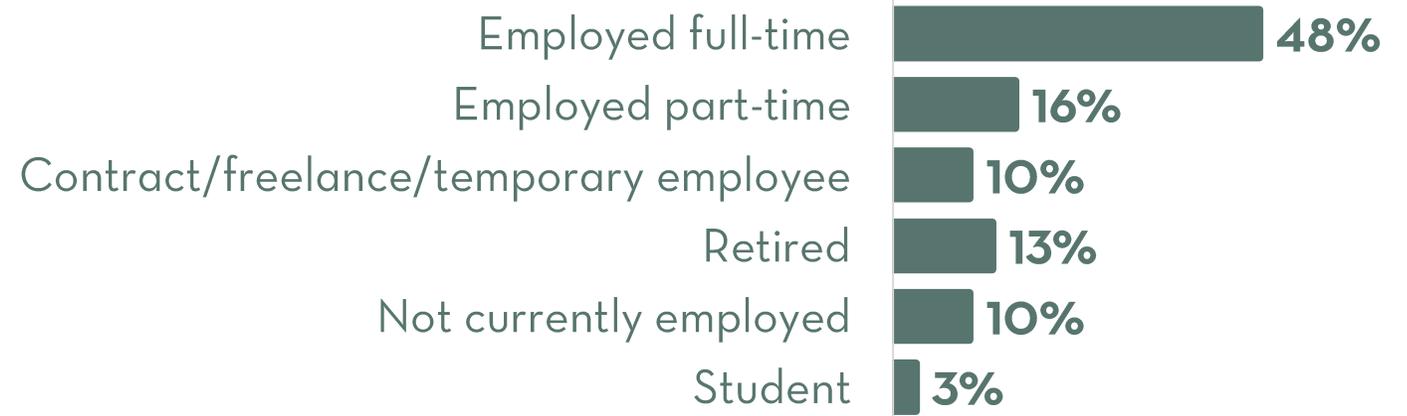
MARITAL STATUS

» Over **4 in 5** visitors to Greater Portland & Casco Bay were married or living with their partner



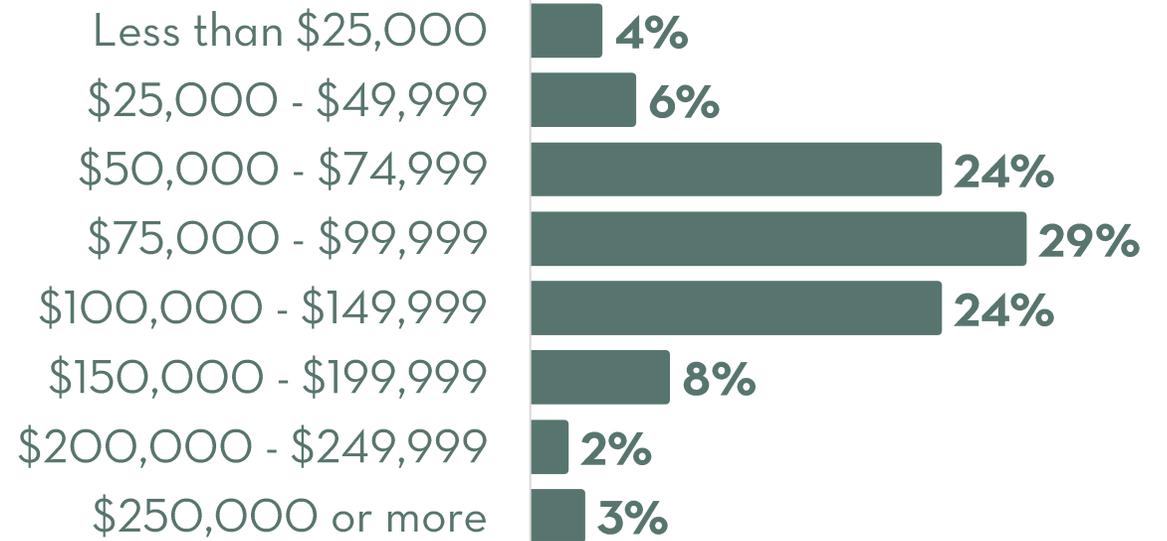
EMPLOYMENT STATUS

» Nearly **3 in 4** visitors to Greater Portland & Casco Bay were employed, most full-time



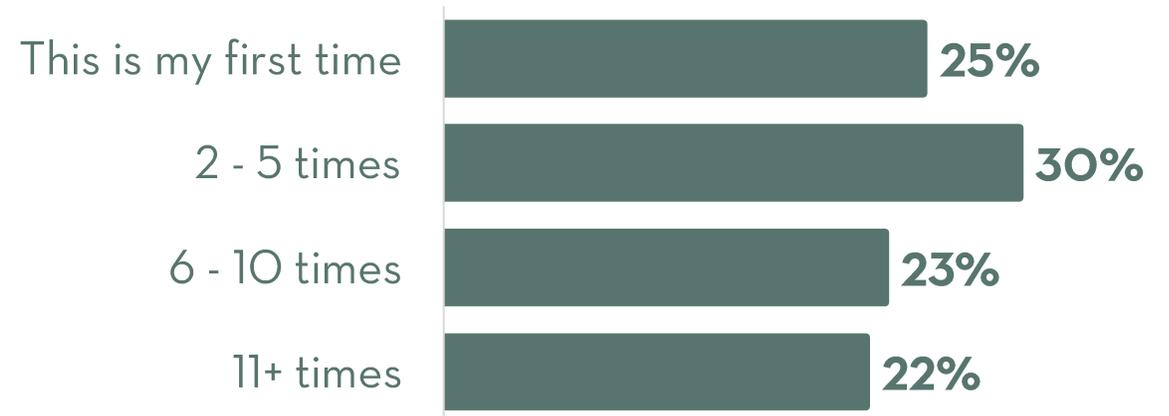
HOUSEHOLD INCOME

- » The average household income of visitors to Greater Portland & Casco Bay is **\$88,800** per year
- » **13%** of visitors to Greater Portland & Casco Bay earned more than \$150,000 per year



NEW & RETURNING VISITORS

- » **25%** of visitors to Greater Portland & Casco Bay were traveling in Maine for the first time
- » **22%** of visitors to Greater Portland & Casco Bay had previously traveled in Maine more than 10 times

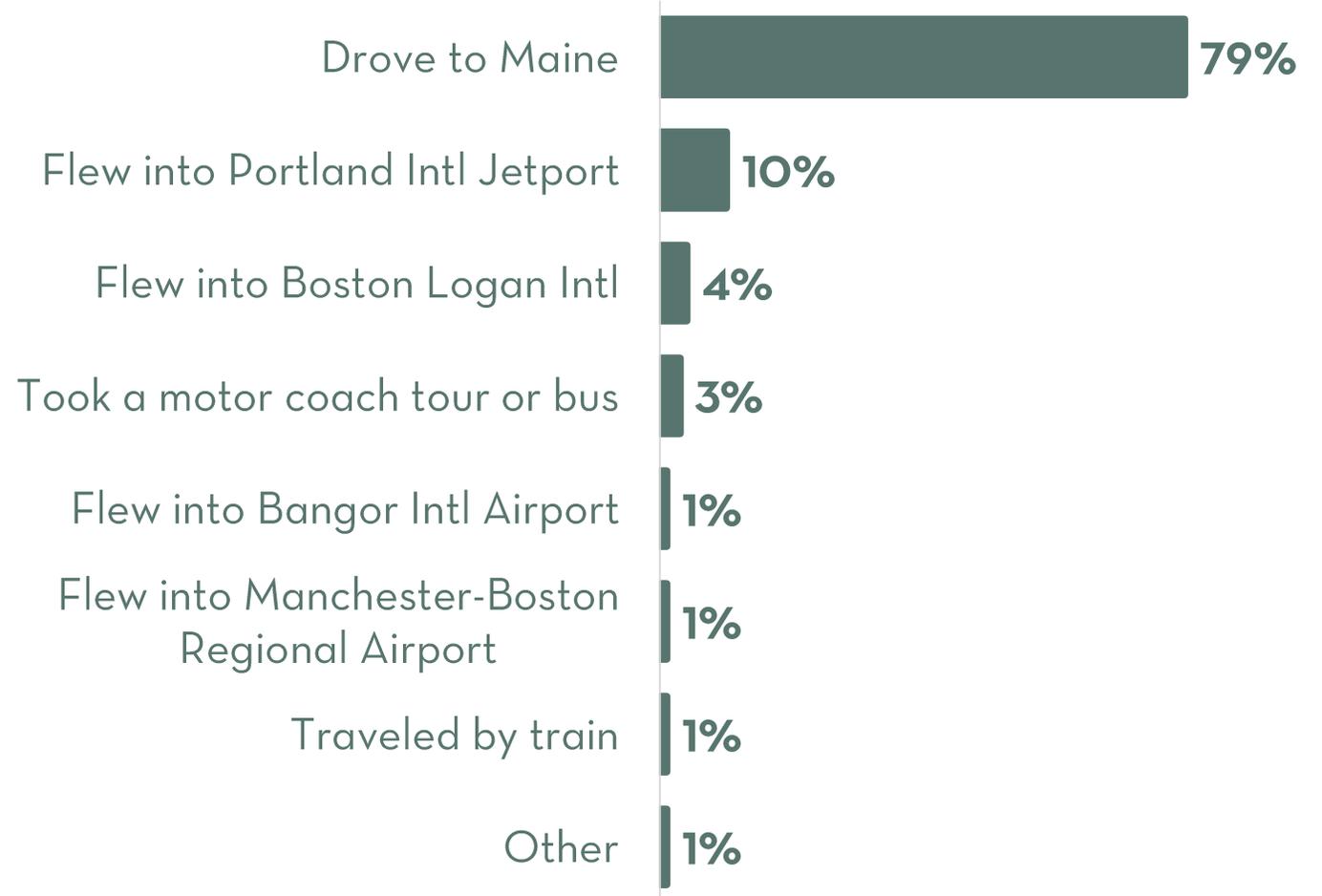


TRIP PLANNING CYCLE : TRIP EXPERIENCE



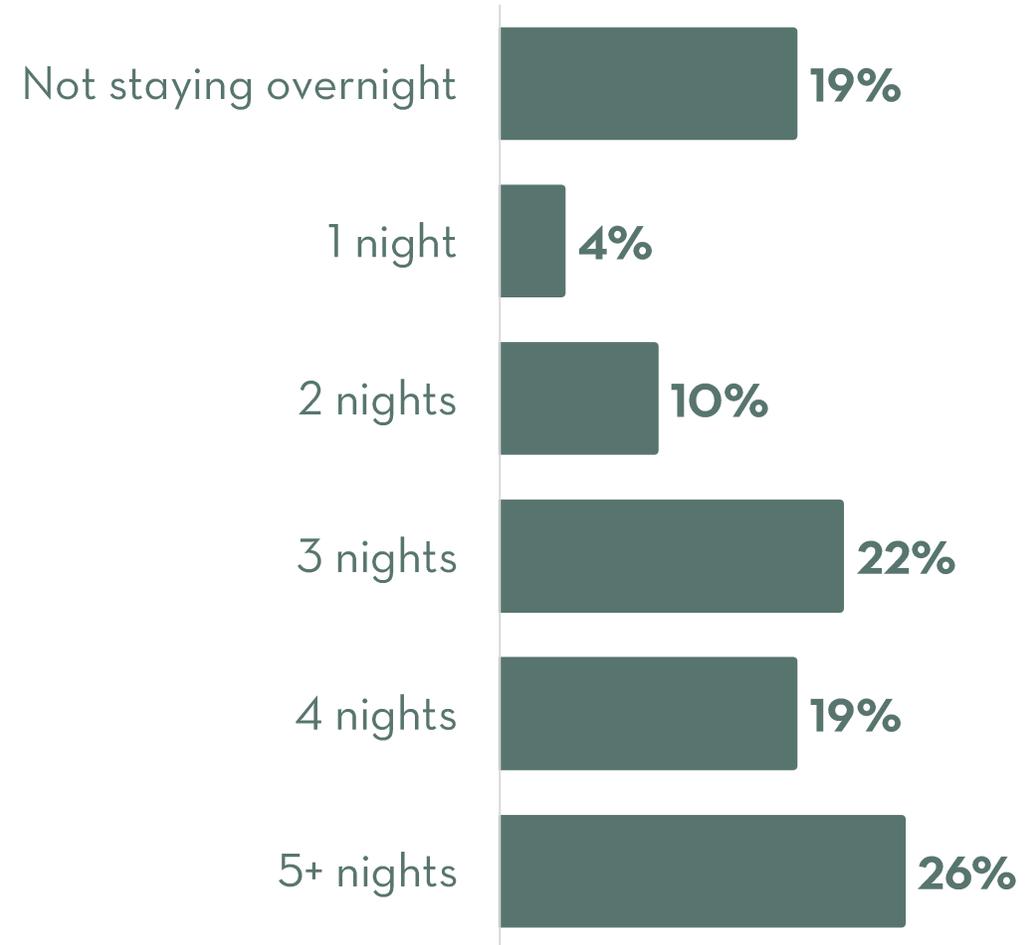
MODES OF TRANSPORTATION

- » Greater Portland & Casco Bay is a drive-market for most visitors, with **79%** choosing to travel by car over plane, motor coach/bus, or train
- » Most Greater Portland & Casco Bay visitors who flew to Maine arrived at Portland International Jetport



NIGHTS STAYED

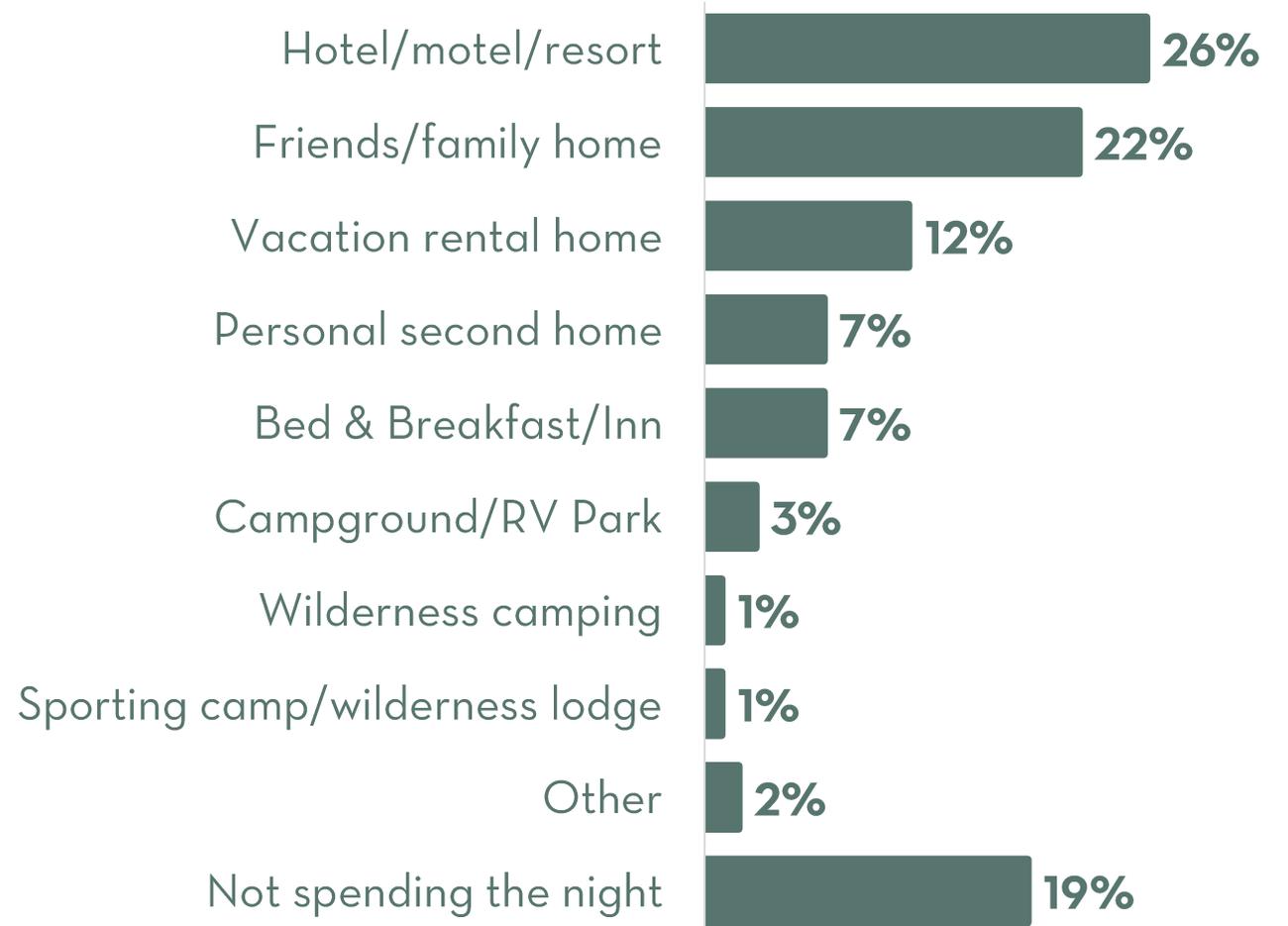
- » **81%** of visitors to Greater Portland & Casco Bay stayed one or more nights in Maine on their trip
- » Typical visitors stayed **4.5*** nights in Greater Portland & Casco Bay on their trips
- » Typical visitors to Greater Portland & Casco Bay staying overnight in paid accommodations stayed **4.6** nights in Maine on their trips



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

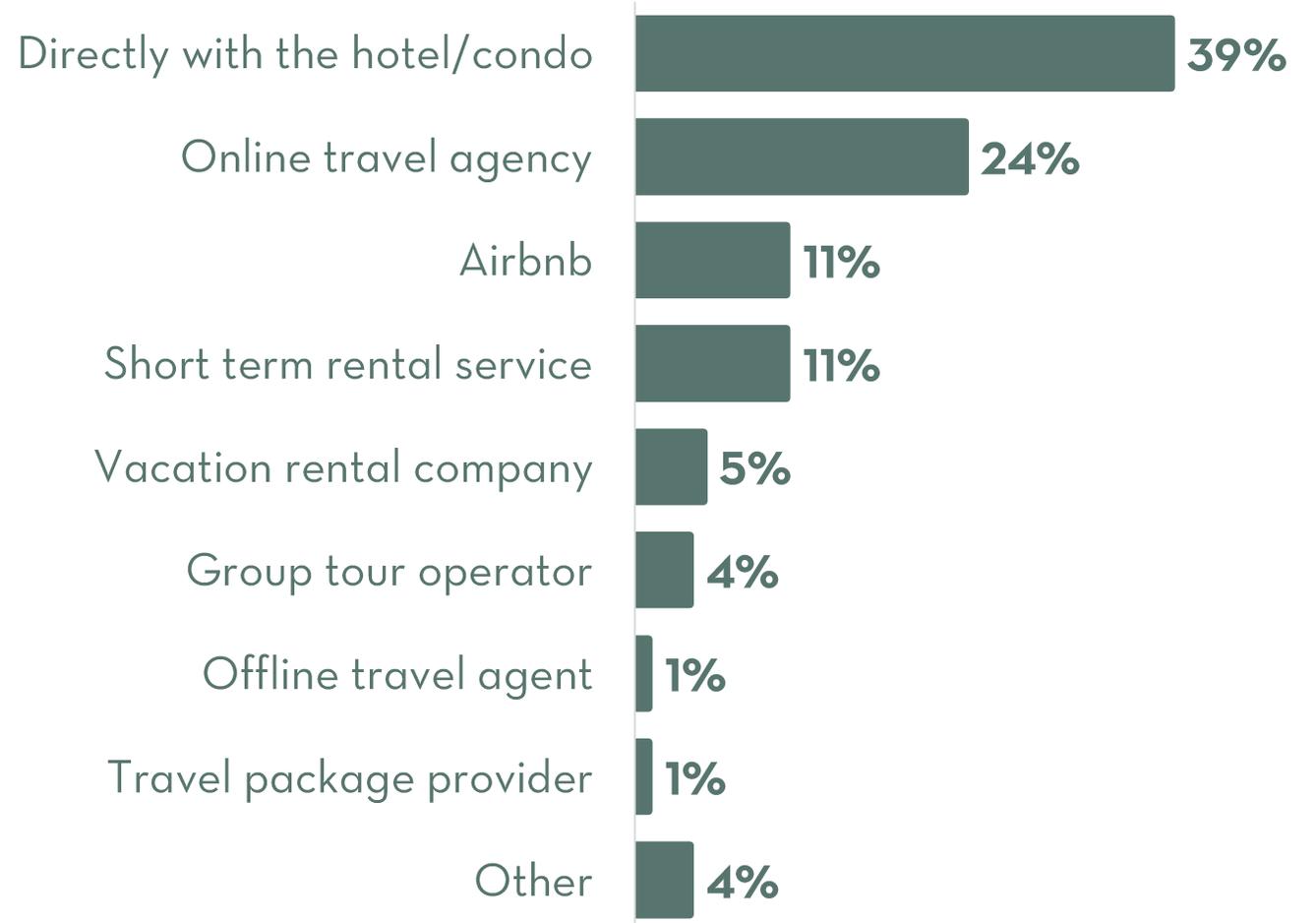
ACCOMMODATIONS

- » Over **1 in 4** visitors to Greater Portland & Casco Bay stayed overnight at a hotel/motel/resort
- » Over **1 in 5** visitors stayed with friends and relatives on their trip to Greater Portland & Casco Bay



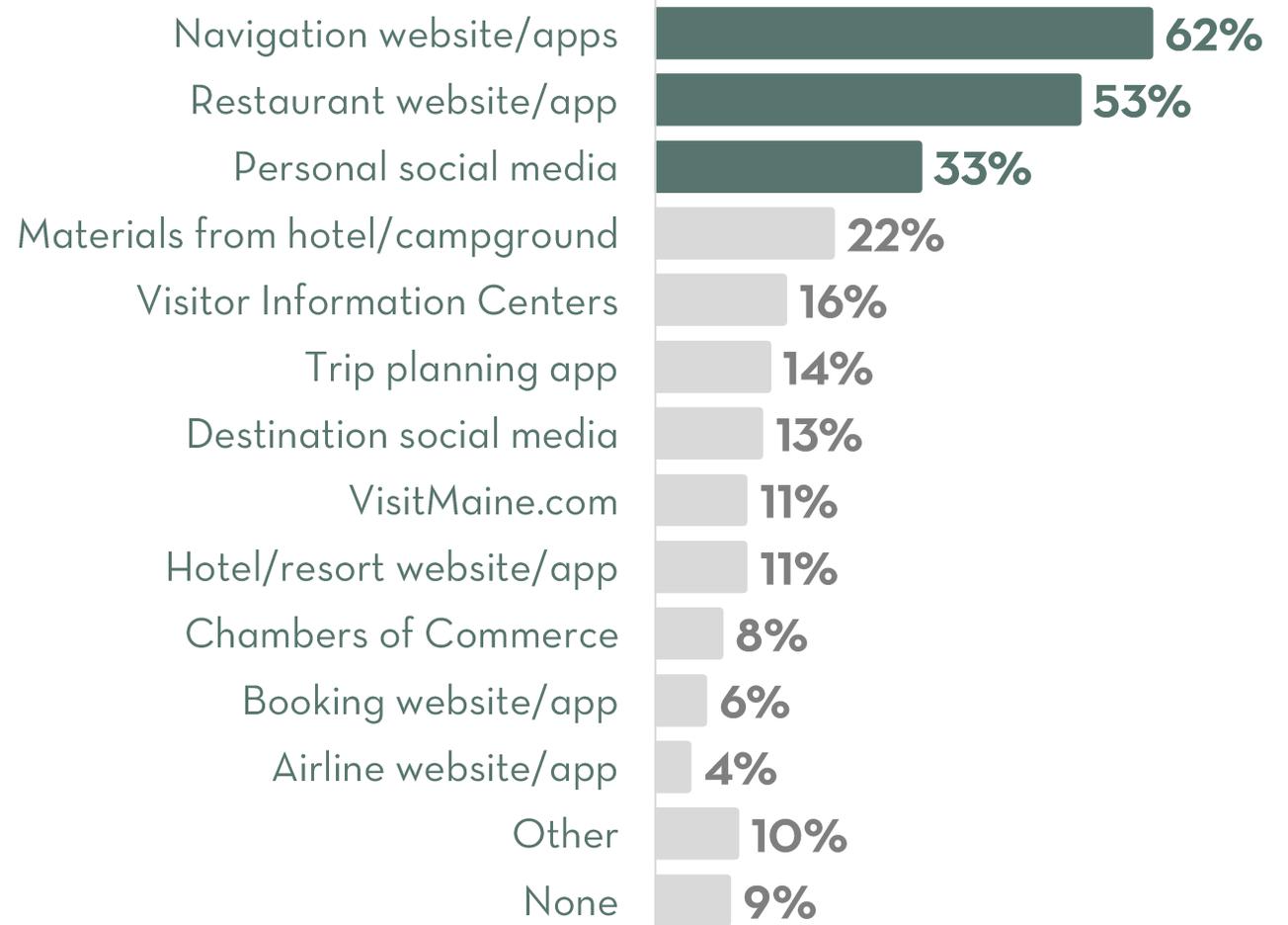
BOOKING METHODS

» Nearly **2 in 5** visitors to Greater Portland & Casco Bay who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



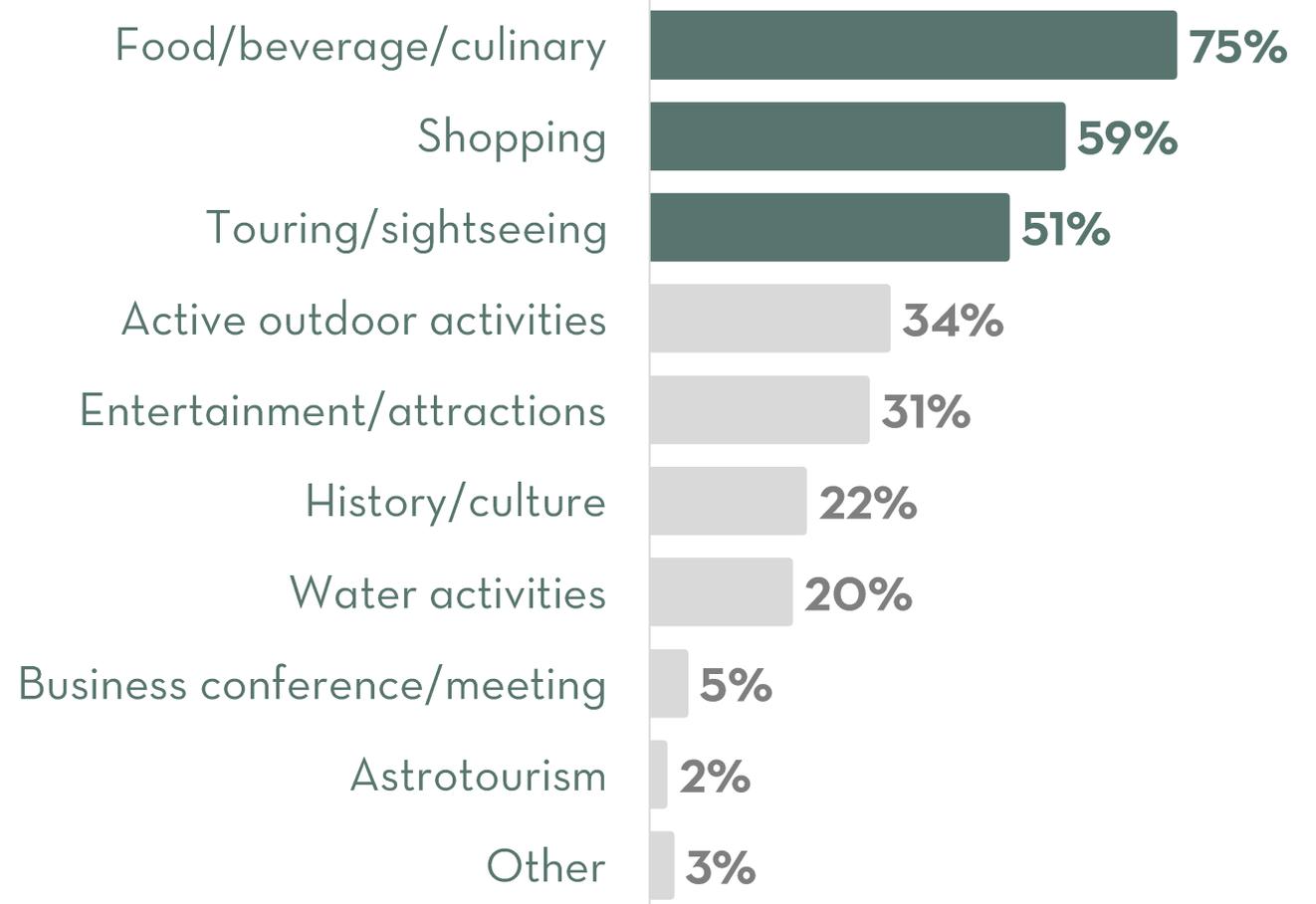
IN-MARKET VISITOR RESOURCES*

- » Visitors were more likely to rely on **navigation websites/apps** to plan activities in-market
- » About **half** of visitors used a restaurant website or app
- » Only **9%** of visitors did not use any resources to plan activities while they were in Greater Portland & Casco Bay

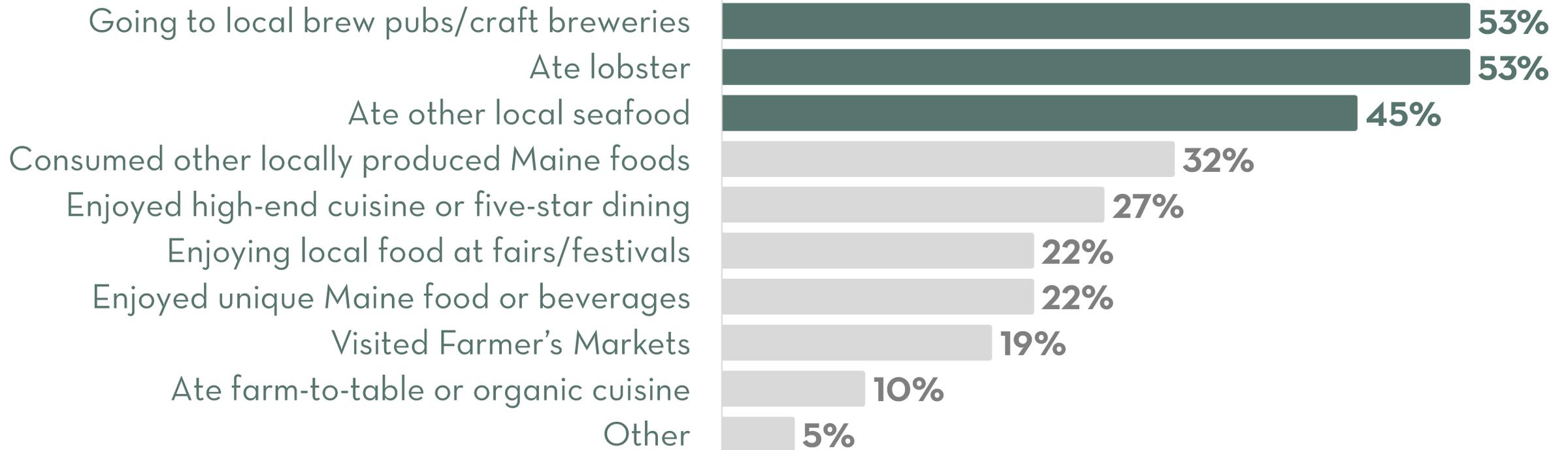


VISITOR ACTIVITIES*

- » **75%** of visitors engaged in food/beverage/culinary activities during their trip to Greater Portland & Casco Bay
- » Nearly **3 in 5** visitors went shopping during their trip to Greater Portland & Casco Bay
- » Over **half** of visitors went touring/sightseeing during their trip to Greater Portland & Casco Bay

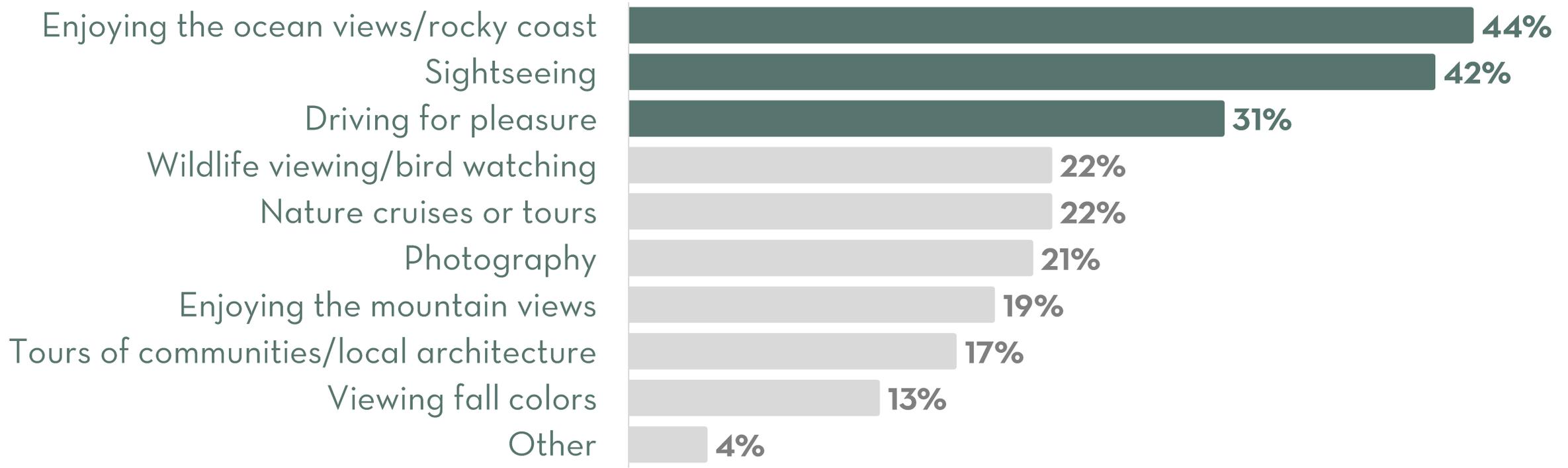


FOOD & BEVERAGE ACTIVITIES*



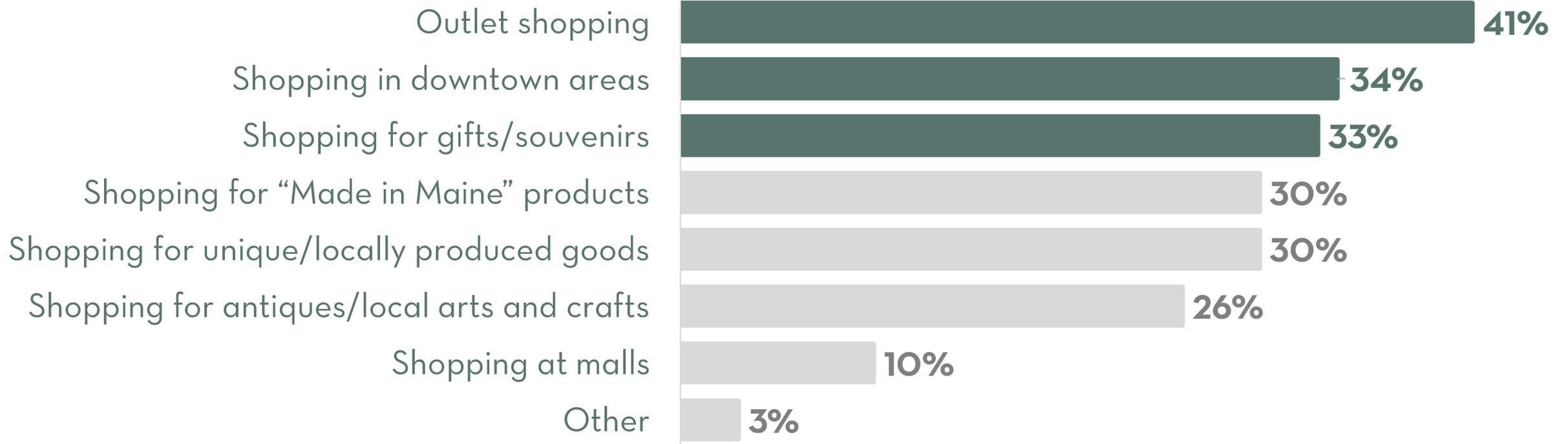
*Multiple responses permitted.

TOURING & SIGHTSEEING ACTIVITIES*

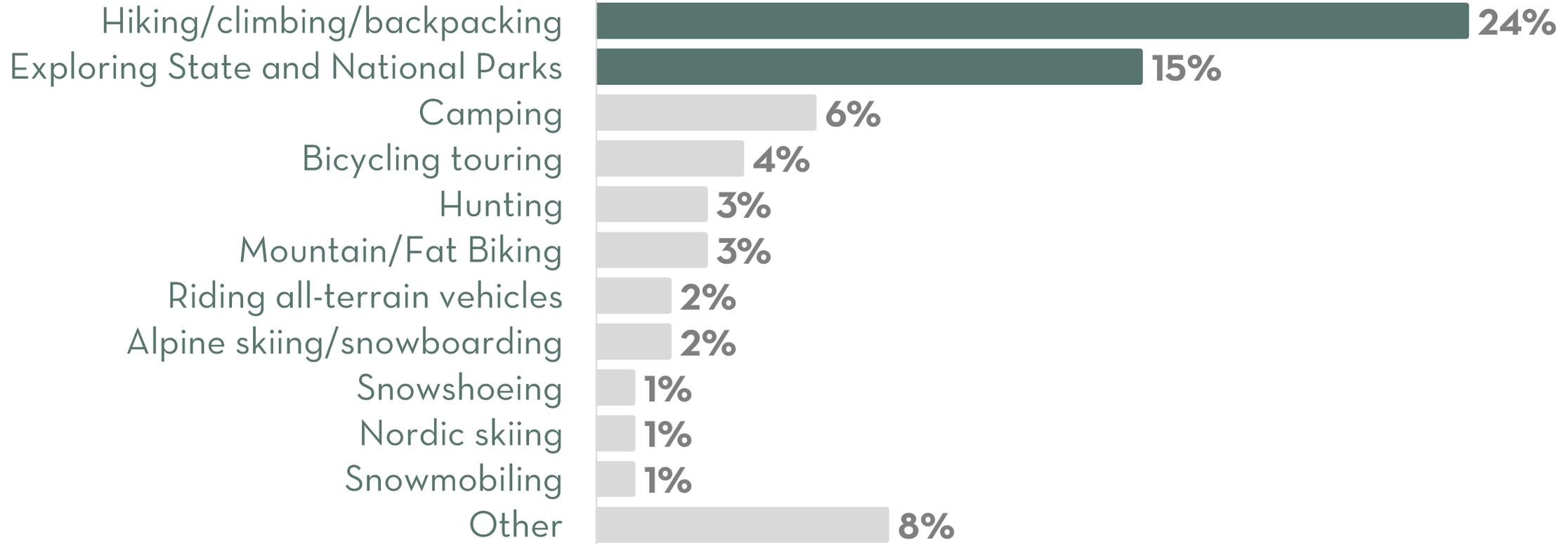


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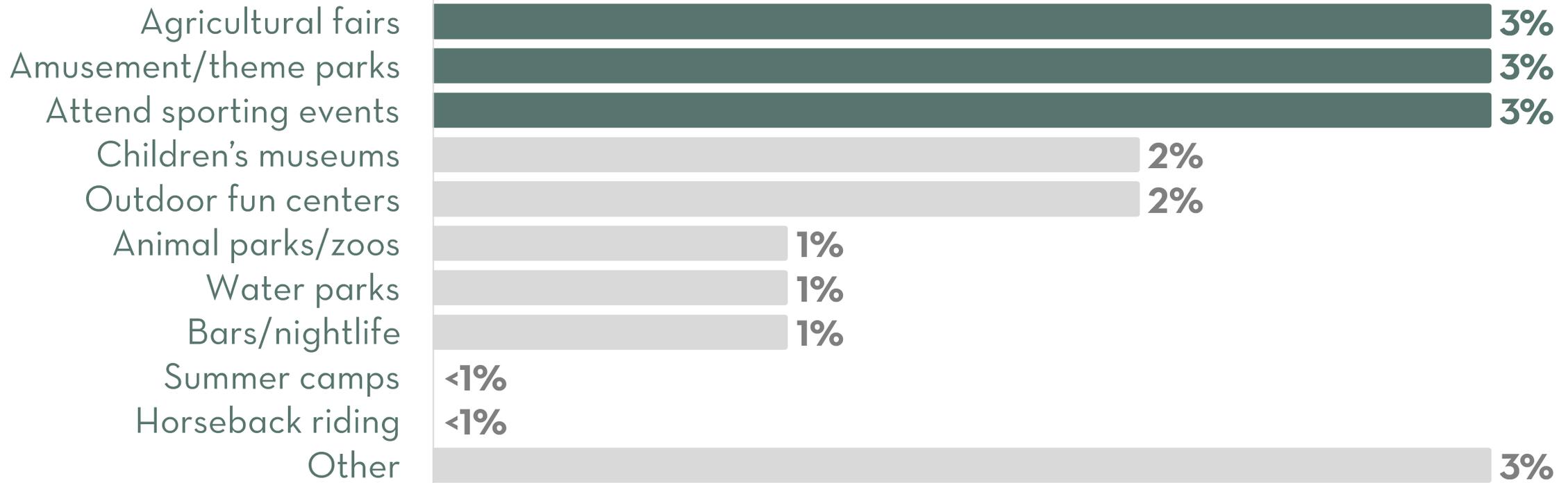
SHOPPING ACTIVITIES*



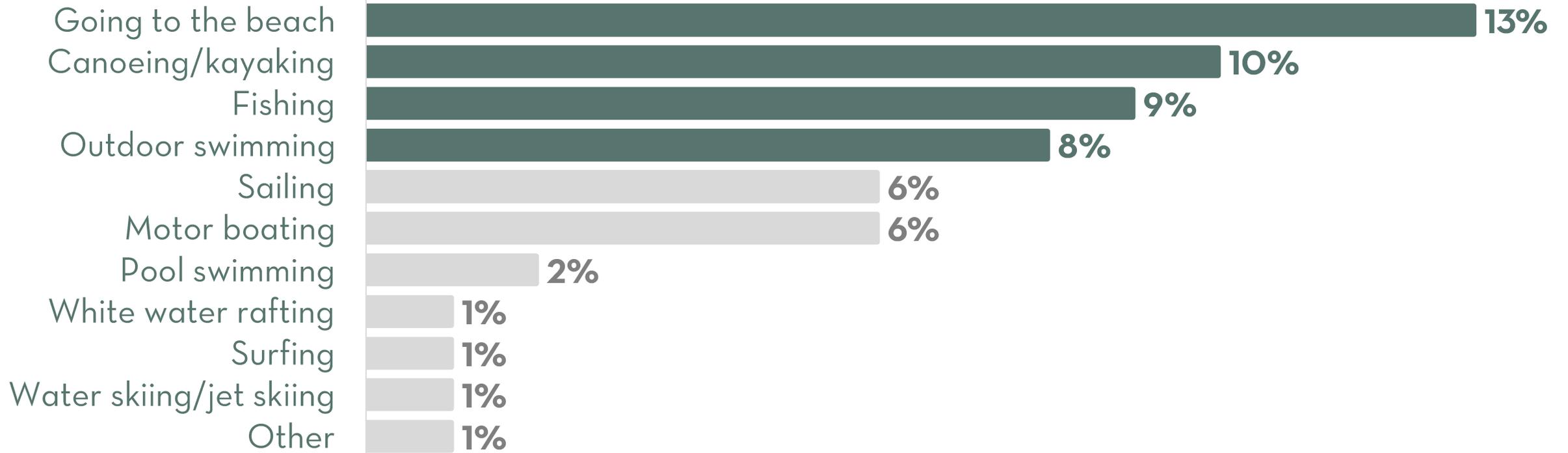
ACTIVE OUTDOOR ACTIVITIES*



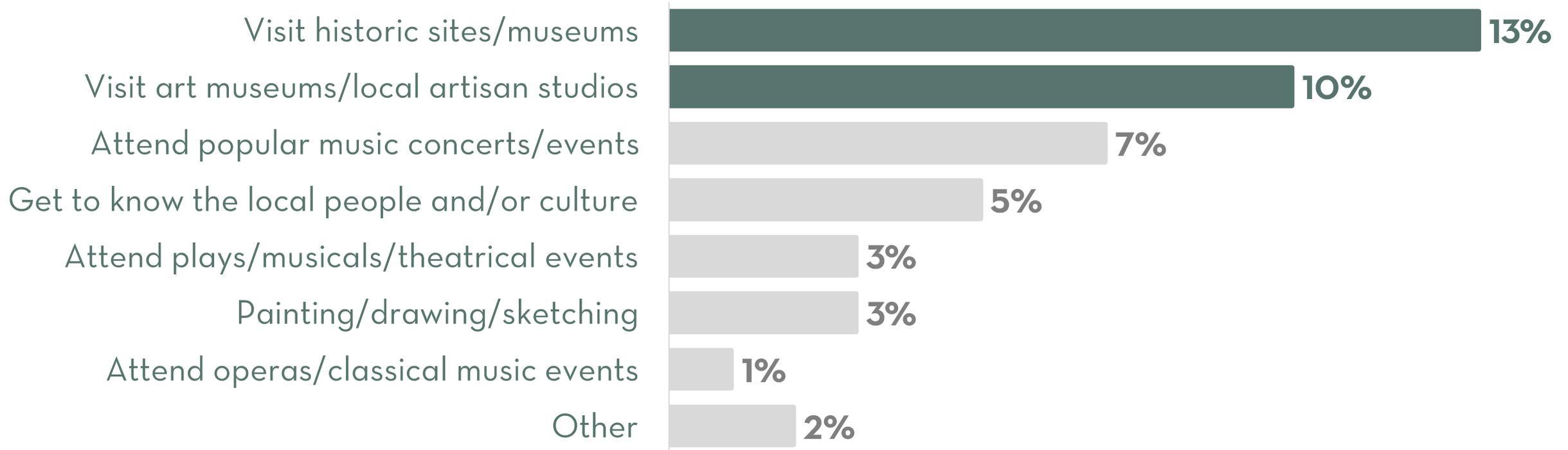
ENTERTAINMENT ACTIVITIES*



WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

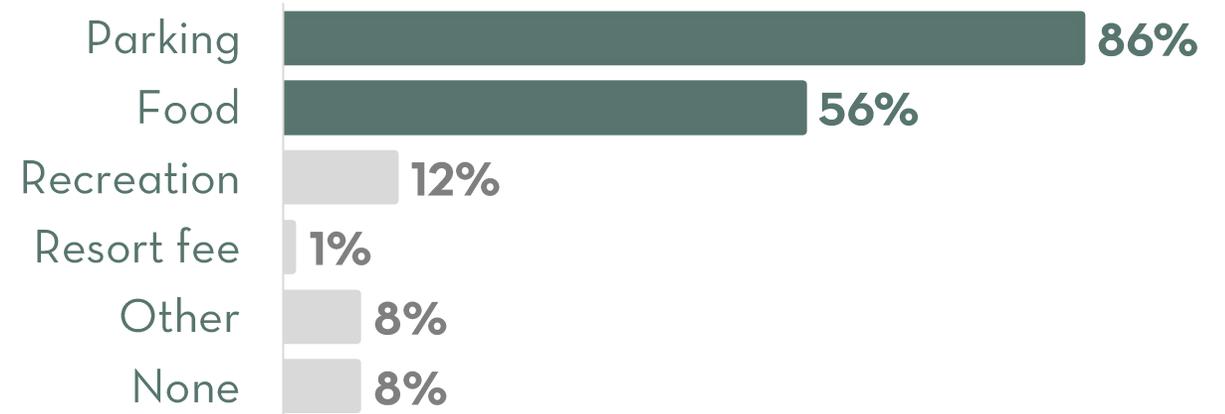
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$294	\$0	\$0
Restaurants	\$41	\$28	\$40
Groceries	\$30	\$39	\$16
Shopping	\$121	\$89	\$62
Activities & attractions	\$108	\$83	\$91
Transportation	\$54	\$34	\$39
Other	\$10	\$8	\$10
Daily Spending	\$658	\$281	\$258

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,358	\$0	\$0
Restaurants	\$186	\$182	\$40
Groceries	\$136	\$257	\$16
Shopping	\$559	\$602	\$62
Activities & attractions	\$502	\$564	\$91
Transportation	\$248	\$225	\$39
Other	\$45	\$49	\$10
Trip Spending	\$3,034	\$1,879	\$258

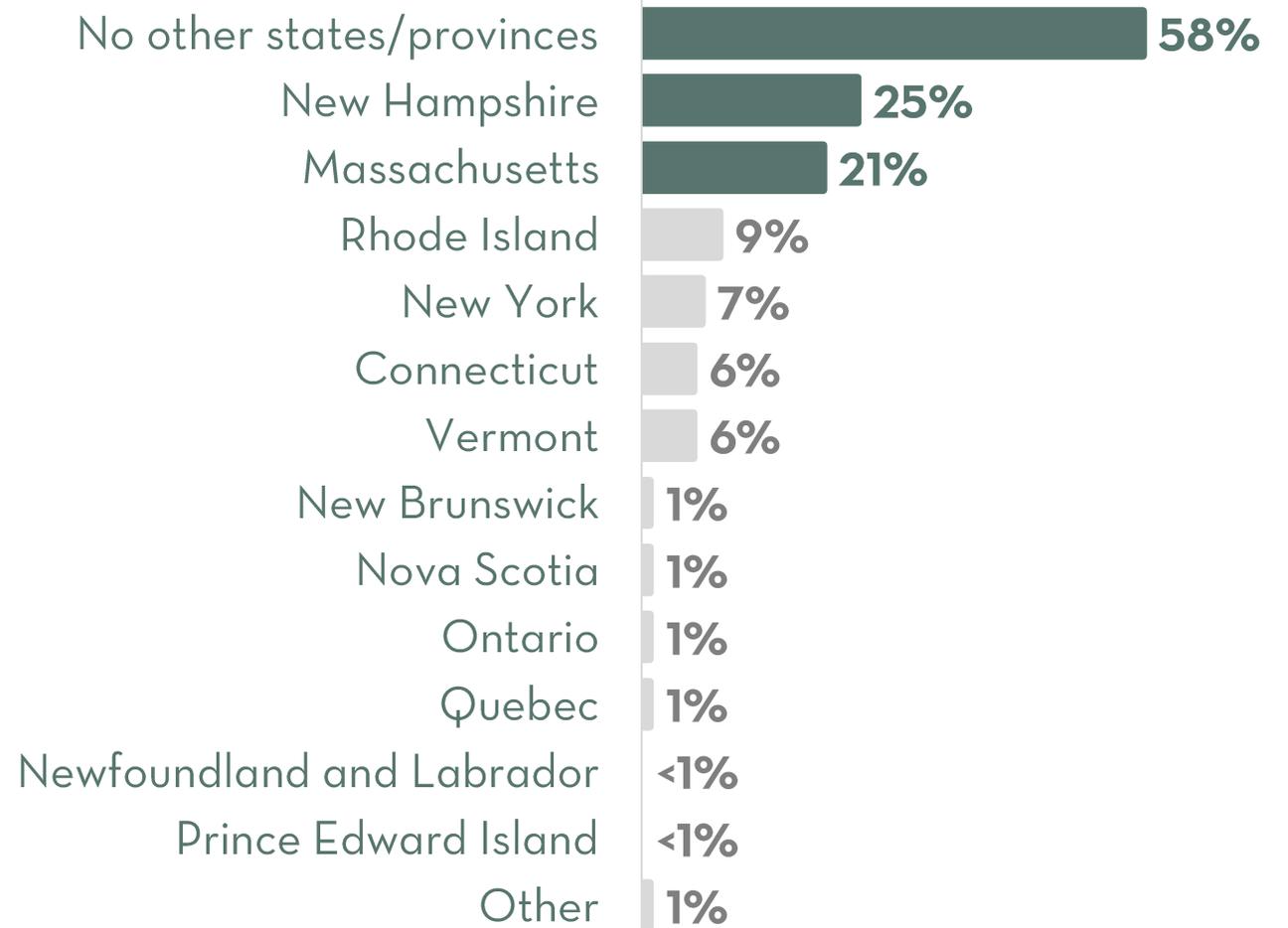
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc. was included in the room price for over **9 in 10** visitors
- » Price for accommodations included parking for nearly **9 in 10** visitors
- » Food was included in accommodations' pricing for nearly **3 in 5** of visitors



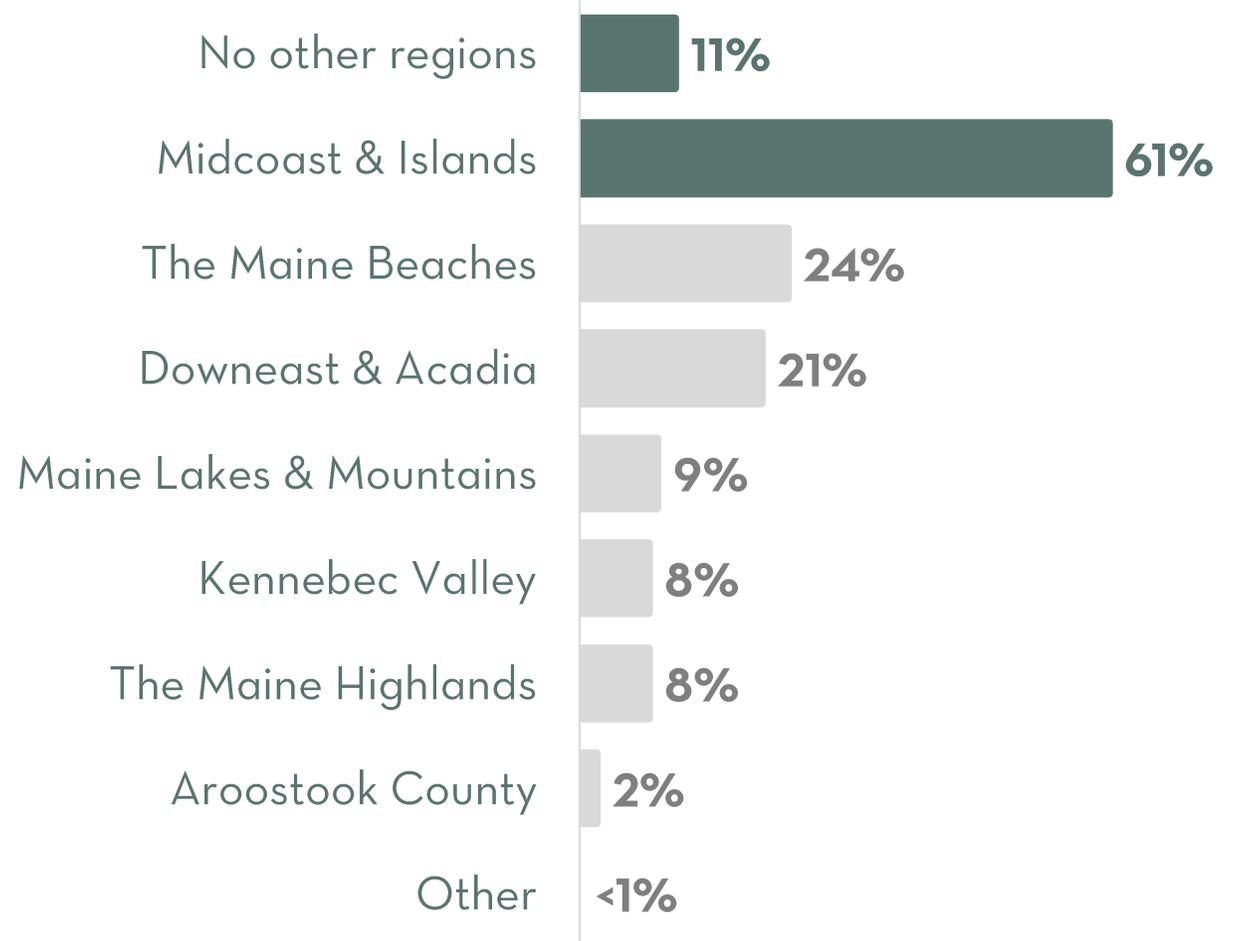
OTHER STATES & PROVINCES VISITED*

- » Nearly **3 in 5** visitors did not visit any other U.S. state or Canadian province during their trip
- » Visitors continued to be **more likely** to visit U.S. states near Greater Portland & Casco Bay than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE*

- » About **1 in 10** visitors stayed within Greater Portland & Casco Bay during their trip in Maine, rather than traveling throughout the state
- » **61%** of visitors to Greater Portland & Casco Bay traveled to the Midcoast & Islands during their trip in Maine



TRIP PLANNING CYCLE : POST-TRIP EVALUATION

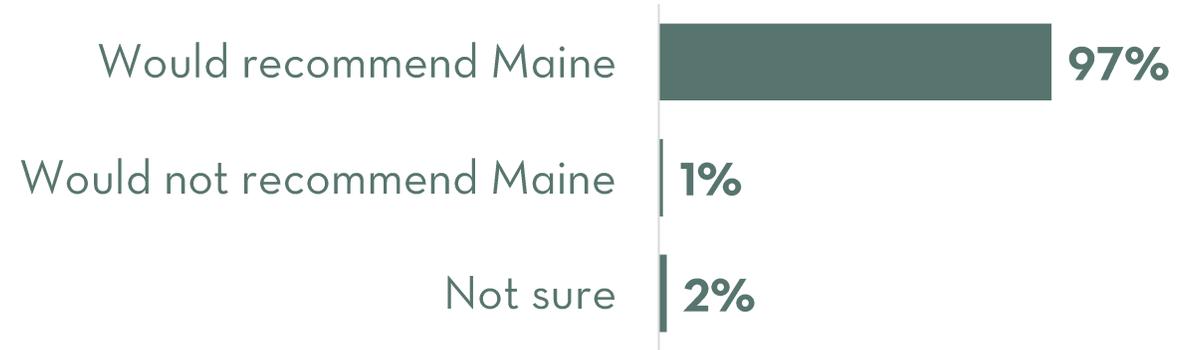


RECOMMENDING MAINE & ITS REGIONS

» **97%** of visitors to Greater Portland & Casco Bay would recommend that their friends and family choose Maine as their destination for a future visit or vacation

» **97%** of visitors would recommend that their friends and family visit Greater Portland & Casco Bay - **62%** would definitely recommend

Likelihood of Recommending Maine

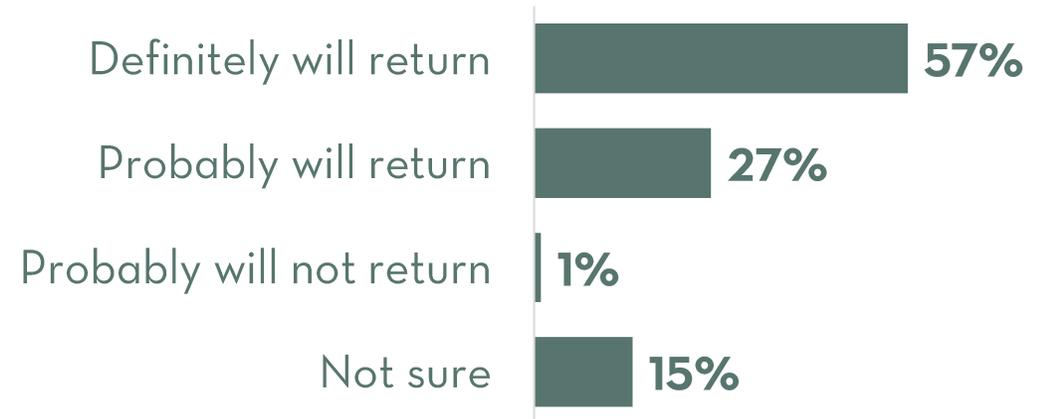


Likelihood of Recommending Region Visited



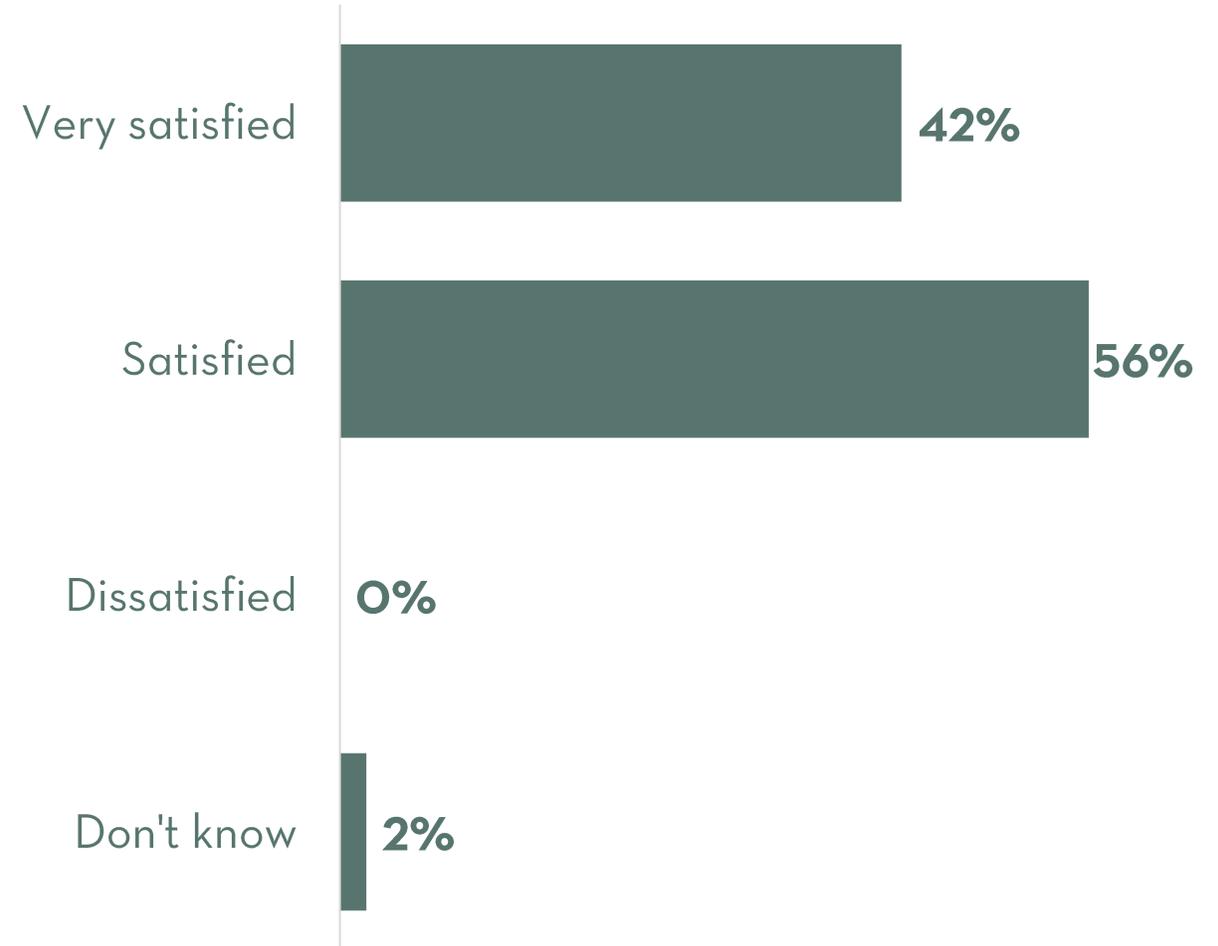
LIKELIHOOD OF RETURNING TO MAINE

» **84%** of visitors to Greater Portland & Casco Bay will return to Maine for a future visit or vacation

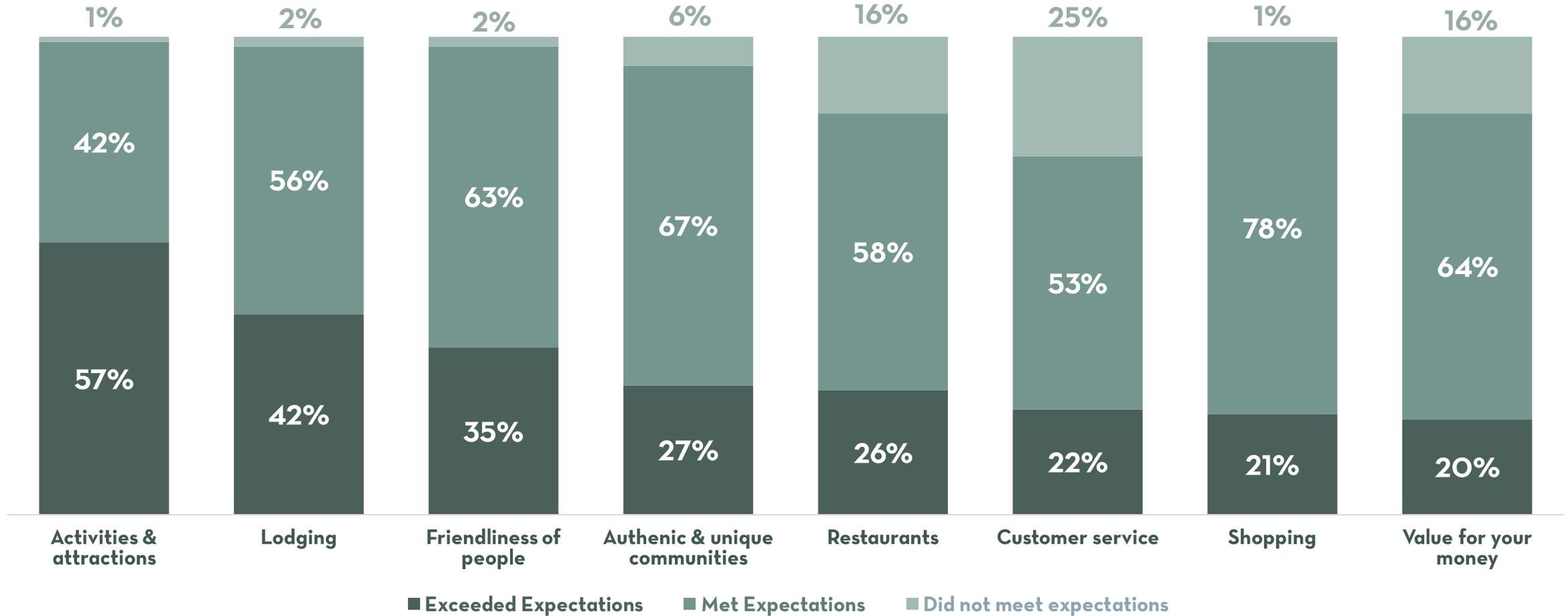


SATISFACTION

- » **98%** of visitors to Greater Portland & Casco Bay were satisfied with their trip to Maine
- » Over **2 in 5** of visitors were very satisfied with their trip to Maine

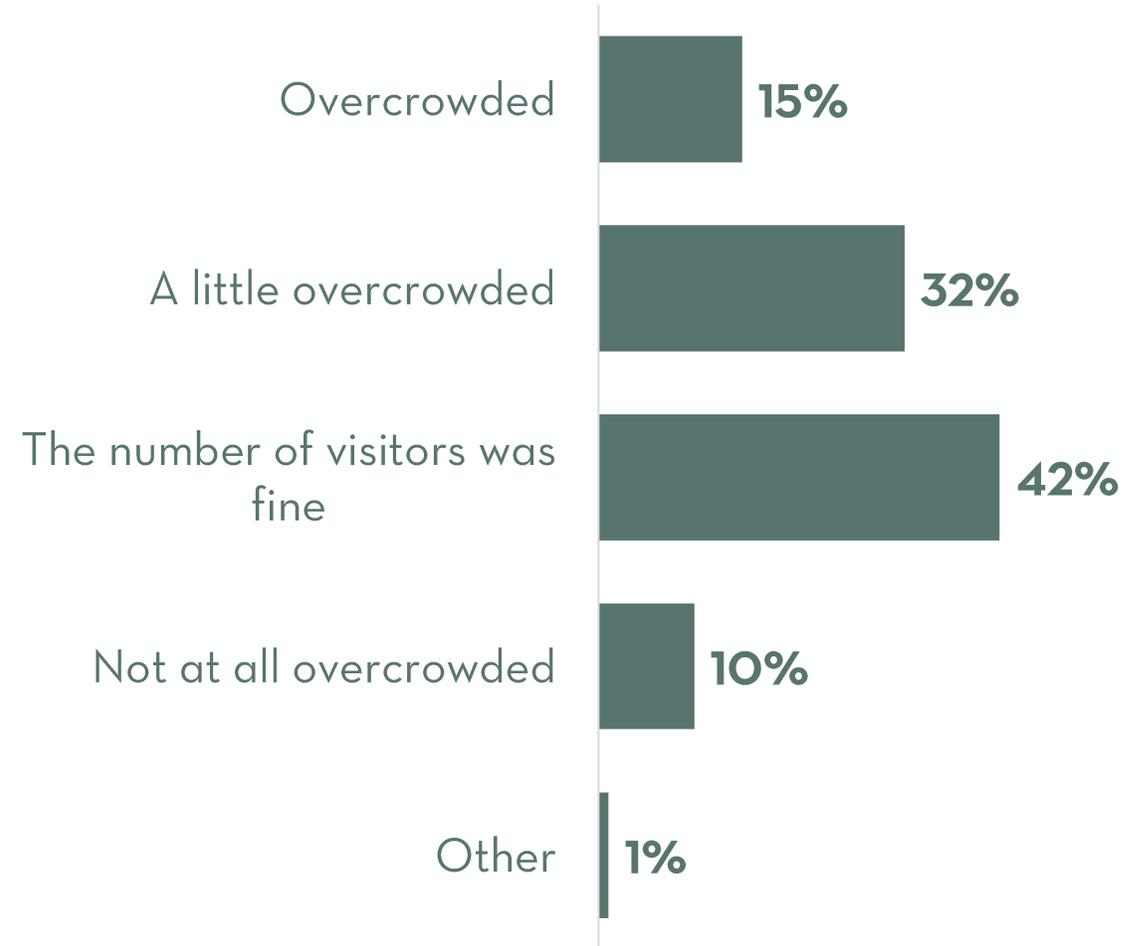


TRIP EXPECTATIONS



OVERCROWDING

- » **42%** of visitors to Greater Portland & Casco Bay thought the number of visitors during their trip was fine
- » **32%** of visitors though it was a little overcrowded



ANNUAL COMPARISONS



TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

Trip Planning Cycle	2021	2022
A week or less	12%	9%
2 - 3 weeks	15%	15%
1 - 2 months	29%	30%
3 - 4 months	18%	17%
5 - 6 months	12%	15%
7 months - 1 year	7%	11%
More than 1 year	7%	3%
Days in Planning Cycle	54	56

Booking Window	2021	2022
A week or less	18%	14%
2 - 3 weeks	18%	18%
1 - 2 months	28%	30%
3 - 4 months	15%	14%
5 - 6 months	11%	14%
7 months - 1 year	6%	8%
More than 1 year	4%	2%
Days in Booking Window	45	48

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2021	2022
Online search engines	38%	42%
Traveler reviews/blogs/stories	9%	19%
Hotel websites	17%	18%
VisitMaine.com	11%	15%
Instagram	8%	13%
Online travel agency	16%	13%
Facebook	9%	11%
TripAdvisor	14%	11%
VRBO/HomeAway	8%	10%
Airbnb	12%	10%
Visit Maine social media	5%	9%
Vacation rental websites	6%	7%
VisitPortland.com	6%	7%
YouTube	5%	6%
Airline websites	8%	5%
MaineTourism.com	7%	4%
DiscoverNewEngland.com	2%	3%
DowneastAcadia.com	3%	2%
MainesMidCoast.com	2%	2%
TheMaineBeaches.com	1%	2%
VisitBarHarbor.com	3%	2%
VisitAroostook.com	1%	1%
KennebecValley.org	1%	1%
TheMaineHighlands.com	1%	1%
MaineLakesandMountains.com	1%	1%
Twitter	2%	1%
Other	9%	4%
None	23%	16%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2021	2022
Advice from friends/family	35%	40%
Articles or travelogues	9%	27%
AAA	7%	18%
Travel planning apps	8%	8%
Travel guides/brochures	10%	6%
Travel books & magazines	10%	5%
Called local Chambers of Commerce	1%	4%
Called the Maine Office of Tourism	4%	3%
Visitor Guide	3%	2%
Visit Maine e-newsletter	1%	2%
Called local convention and visitors bureaus	1%	1%
Called another Maine Tourism/Lodging Association	2%	1%
Travel agent	2%	1%
Other	4%	3%
None	45%	21%

REASON FOR VISITING*

Reasons for Visiting	2021	2022
Visiting friends/relatives	30%	26%
Sightseeing/touring	31%	26%
Relax and unwind	43%	26%
Shopping	10%	15%
Special occasion	13%	15%
Attractions	8%	13%
Special event	3%	10%
Nature & bird watching	14%	11%
Active outdoor activities	7%	7%
Conference/meeting	4%	5%
Beach	8%	5%
Culture/museums/history	4%	5%
Water activities	5%	4%
Sporting event	1%	1%
Snow activities	1%	1%
Astrotourism	<1%	<1%
Other	2%	5%

*Multiple responses permitted.

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2021	2022
No other states/provinces	67%	57%
New Hampshire	13%	25%
Massachusetts	12%	20%
Rhode Island	5%	10%
Vermont	8%	8%
New York	5%	7%
Connecticut	3%	6%
New Brunswick	1%	1%
Newfoundland and Labrador	1%	1%
Nova Scotia	1%	1%
Ontario	1%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
Other	5%	2%

ADVERTISING/PROMOTIONS

Recalled Advertising	2021	2022
Yes	38%	63%
No	49%	28%
Not sure	13%	9%

Influenced by Advertising	2021	2022
Yes	NA	44%

ADVERTISING/PROMOTIONS*

Sources of Advertising Noticed*	2021	2022
Social media	32%	43%
Internet	36%	40%
Magazine	22%	26%
Radio	9%	11%
AAA	6%	11%
Cable or satellite television	23%	10%
VisitMaine.com	10%	9%
Traveler reviews/blogs	11%	9%
Newspaper	7%	7%
Maine travel/visitor guide	10%	5%
Online streaming service	7%	3%
Brochure	5%	3%
Deal – based promotion	3%	2%
Billboard	4%	2%
Music/podcast streaming	4%	2%
Other	5%	3%
Not sure	2%	1%

TRIP PLANNING CYCLE : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2021	2022
Maine	11%	11%
New England	29%	38%
Mid-Atlantic	26%	24%
Southeast	14%	9%
Southwest	4%	3%
Midwest	11%	7%
West	4%	4%
Canada	1%	3%
International	<1%	1%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2021	2022
Massachusetts	14%	18%
Maine	11%	11%
New York	10%	9%
Connecticut	4%	7%
New Hampshire	5%	7%
New Jersey	5%	6%
Florida	6%	4%
Pennsylvania	5%	4%
Maryland	3%	3%
Virginia	4%	3%
California	2%	2%
Illinois	2%	2%
Rhode Island	1%	2%
Texas	3%	2%
Vermont	1%	2%

ORIGIN MARKET

Origin Markets	2021	2022
New York City ¹	10%	11%
Boston	8%	11%
Washington DC - Baltimore ²	5%	4%
Philadelphia	3%	2%
Providence, RI	1%	2%
Brockton, MA	3%	2%

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

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

TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2021	2022
Traveled alone	15%	12%
As a couple	46%	55%
As a family	28%	20%
With business associates	1%	1%
In a tour group	1%	2%
With other couples/friends	8%	10%
Other	1%	<1%
Average Travel Party Size	2.7	2.7

TRAVEL WITH CHILDREN*

Children in Travel Party	2021	2022
No children	81%	87%
Children younger than 6	6%	4%
Children 6 – 12	10%	7%
Children 13 – 17	10%	6%

Gender	2021	2022
Male	46%	39%
Female	54%	61%

DEMOGRAPHIC PROFILE

Age	2021	2022
Under 25	6%	3%
25 – 34	18%	12%
35 – 44	23%	25%
45 – 54	18%	21%
55 – 65	19%	30%
Over 65	16%	9%
Median Age	47	50

Race/Ethnicity	2021	2022
White	86%	84%
Asian	5%	5%
Black	4%	4%
Hispanic	4%	3%
Indigenous	0%	<1%
Other	1%	4%

LIFESTYLE PROFILE

Marital Status	2021	2022
Single/widowed	23%	19%
Married/living with partner	77%	81%

Employment Status	2021	2022
Employed full-time	56%	48%
Employed part-time	10%	16%
Contract/freelance/temporary employee	8%	10%
Retired	17%	13%
Not currently employed	4%	10%
Student	5%	3%

LIFESTYLE PROFILE

Household Income	2021	2022
Less than \$25,000	5%	4%
\$25,000 - \$49,999	9%	6%
\$50,000 - \$74,999	23%	24%
\$75,000 - \$99,999	24%	29%
\$100,000 - \$149,999	21%	24%
\$150,000 - \$199,999	11%	8%
\$200,000 - \$249,999	3%	2%
\$250,000 or more	4%	3%
Median Household Income	\$88,500	\$88,800

LIFESTYLE PROFILE

Educational Attainment	2021	2022
High school or less	9%	5%
Some college or technical school	15%	11%
College or technical school graduate	52%	68%
Graduate school	24%	16%

NEW & RETURNING VISITORS

Previous Trips to Maine	2021	2022
This is my first time	29%	25%
2 - 5 times	30%	30%
6 - 10 times	15%	23%
11+ times	26%	22%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2021	2022
Drove to Maine	66%	79%
Flew into Portland Intl Jetport	21%	10%
Flew into Boston Logan Intl	5%	4%
Took a motor coach tour or bus	2%	3%
Flew into Bangor Intl Airport	2%	1%
Flew into Manchester-Boston Regional Airport	<1%	1%
Traveled by train	2%	1%
Other	1%	1%

LENGTH OF STAY

Nights Stayed	2021	2022
Not staying overnight	22%	19%
1 night	6%	4%
2 nights	12%	10%
3 nights	15%	22%
4 nights	14%	19%
5+ nights	31%	26%
Average Length of Stay	3.8	4.6

ACCOMMODATIONS

Accommodations	2021	2022
Hotel/motel/resort	34%	26%
Friends/family home	15%	22%
Vacation rental home	10%	12%
Personal second home	4%	7%
Bed & Breakfast/Inn	7%	7%
Campground/RV Park	5%	3%
Wilderness camping	1%	1%
Sporting camp/wilderness lodge	1%	1%
Outdoor Outfitter	<1%	<1%
Other	2%	2%
Not spending the night	22%	19%

BOOKING

Booking Methods	2021	2022
Directly with the hotel/condo	49%	39%
Online travel agency	17%	24%
Airbnb	12%	11%
Short term rental service	8%	11%
Vacation rental company	4%	5%
Group tour operator	2%	4%
Offline travel agent	1%	1%
Travel package provider	2%	1%
Other	5%	4%

IN-MARKET RESOURCES*

In-Market Resources	2021	2022
Navigation website/apps	53%	62%
Restaurant website/app	27%	53%
Personal social media	14%	33%
Materials from hotel/campground	15%	22%
Visitor Information Centers	25%	16%
Trip planning app	14%	14%
Destination social media	10%	13%
VisitMaine.com	9%	11%
Hotel/resort website/app	14%	11%
Chambers of Commerce	4%	8%
Booking website/app	10%	6%
Airline website/app	6%	4%
Other	6%	10%
None	17%	9%

ACTIVITIES*

Activities	2021	2022
Food/beverage/culinary	75%	75%
Shopping	47%	59%
Touring/sightseeing	64%	51%
Active outdoor activities	42%	34%
Entertainment/attractions	13%	31%
History/culture	23%	22%
Water activities	29%	20%
Business conference/meeting	3%	5%
Astrotourism	3%	2%
Other	3%	3%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2021	2022
Going to local brew pubs/craft breweries	40%	53%
Ate lobster	55%	53%
Ate other local seafood	50%	45%
Consumed other locally produced Maine foods	25%	32%
Enjoyed high-end cuisine or five-star dining	16%	27%
Enjoying local food at fairs/festivals	10%	22%
Enjoyed unique Maine food or beverages	22%	22%
Visited Farmer's Markets	8%	19%
Ate farm-to-table or organic cuisine	10%	10%
Other	4%	5%

SHOPPING ACTIVITIES*

Shopping Activities	2021	2022
Outlet shopping	29%	41%
Shopping in downtown areas	21%	34%
Shopping for gifts/souvenirs	27%	33%
Shopping for “Made in Maine” products	16%	30%
Shopping for unique/locally produced goods	18%	30%
Shopping for antiques/local arts and crafts	14%	26%
Shopping at malls	16%	10%
Other	1%	3%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2021	2022
Enjoying the ocean views/rocky coast	54%	44%
Sightseeing	52%	42%
Driving for pleasure	38%	31%
Wildlife viewing/bird watching	22%	22%
Nature cruises or tours	33%	22%
Photography	25%	21%
Enjoying the mountain views	24%	19%
Tours of communities/local architecture	20%	17%
Viewing fall colors	13%	13%
Other	1%	4%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2021	2022
Hiking/climbing/backpacking	36%	24%
Exploring State and National Parks	26%	15%
Camping	8%	6%
Bicycling touring	6%	4%
Hunting	2%	3%
Mountain/Fat Biking	3%	3%
Riding all-terrain vehicles	3%	2%
Alpine skiing/snowboarding	2%	2%
Snowshoeing	2%	1%
Nordic skiing	1%	1%
Snowmobiling	2%	1%
Other	2%	8%

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2021	2022
Agricultural fairs	<1%	3%
Amusement/theme parks	2%	3%
Attend sporting events	<1%	3%
Children's museums	1%	2%
Outdoor fun centers	2%	2%
Animal parks/zoos	1%	1%
Water parks	1%	1%
Bars/nightlife	2%	1%
Summer camps	<1%	<1%
Horseback riding	1%	<1%
Other	2%	23%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2021	2022
Visit historic sites/museums	17%	13%
Visit art museums/local artisan studios	12%	10%
Attend popular music concerts/events	2%	7%
Get to know the local people and/or culture	11%	5%
Attend plays/musicals/theatrical events	2%	3%
Painting/drawing/sketching	4%	3%
Attend operas/classical music events	2%	1%
Other	<1%	2%

WATER ACTIVITIES*

Water Activities	2021	2022
Going to the beach	18%	13%
Canoeing/kayaking	11%	10%
Fishing	10%	9%
Outdoor swimming	16%	8%
Sailing	5%	6%
Motor boating	9%	6%
Pool swimming	3%	2%
White water rafting	1%	1%
Surfing	1%	1%
Water skiing/jet skiing	1%	1%
Other	1%	1%

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2021	2022
No other states/provinces	68%	58%
New Hampshire	18%	25%
Massachusetts	16%	21%
Rhode Island	4%	9%
New York	7%	7%
Connecticut	5%	6%
Vermont	5%	6%
New Brunswick	1%	1%
Nova Scotia	1%	1%
Ontario	1%	1%
Quebec	1%	1%
Newfoundland and Labrador	<1%	<1%
Prince Edward Island	<1%	<1%
Other	3%	1%

TRAVELING IN MAINE*

Maine Regions Visited	2021	2022
No other regions	18%	11%
Greater Portland & Casco Bay	100%	100%
Midcoast & Islands	37%	61%
The Maine Beaches	31%	24%
Downeast & Acadia	28%	21%
Maine Lakes & Mountains	10%	9%
Kennebec Valley	13%	8%
The Maine Highlands	11%	8%
Aroostook County	3%	2%
Other	1%	<1%

TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2021	2022
Would recommend Maine	98%	97%
Would not recommend Maine	0%	1%
Not sure	2%	2%

Recommending Regions	2021	2022
Definitely recommend region	79%	62%
Probably would recommend region	14%	35%
Would not recommend region	0%	0%
Not sure	7%	3%

SATISFACTION

Satisfaction	2021	2022
Very satisfied	NA	42%
Satisfied	NA	56%
Dissatisfied	NA	0%
Don't know	NA	2%

RETURNING TO MAINE

Returning to Maine	2021	2022
Definitely will return	71%	57%
Probably will return	22%	27%
Probably will not return	1%	1%
Not sure	6%	15%

TRIP EXPECTATIONS

Exceeded Expectations	2021	2022
Activities & attractions	46%	57%
Lodging	35%	42%
Friendliness of people	45%	35%
Authentic & unique communities	41%	27%
Restaurants	42%	26%
Customer service	36%	22%
Shopping	32%	21%
Value for your money	29%	20%

OVERCROWDING

Overcrowding	2021	2022
Overcrowded	NA	15%
A little overcrowded	NA	32%
The number of visitors was fine	NA	42%
Not at all overcrowded	NA	10%
Other	NA	1%

STUDY METHODS



METHODOLOGY



Visitor Tracking

655 interviews were completed with visitors to Greater Portland & Casco Bay online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2021, and November 30th, 2022.

Economic Impact

Total economic impact of tourism on Greater Portland & Casco Bay is a function of direct spending by visitors to Greater Portland & Casco Bay, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to Greater Portland & Casco Bay. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Greater Portland & Casco Bay's multiplier is 1.76.

GREATER PORTLAND & CASCO BAY

2022 Economic Impact & Visitor Tracking Report

DECEMBER 2021 – NOVEMBER 2022

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

