

DOWNEAST & ACADIA

2020 Economic Impact & Visitor Tracking Report
January - December 2020

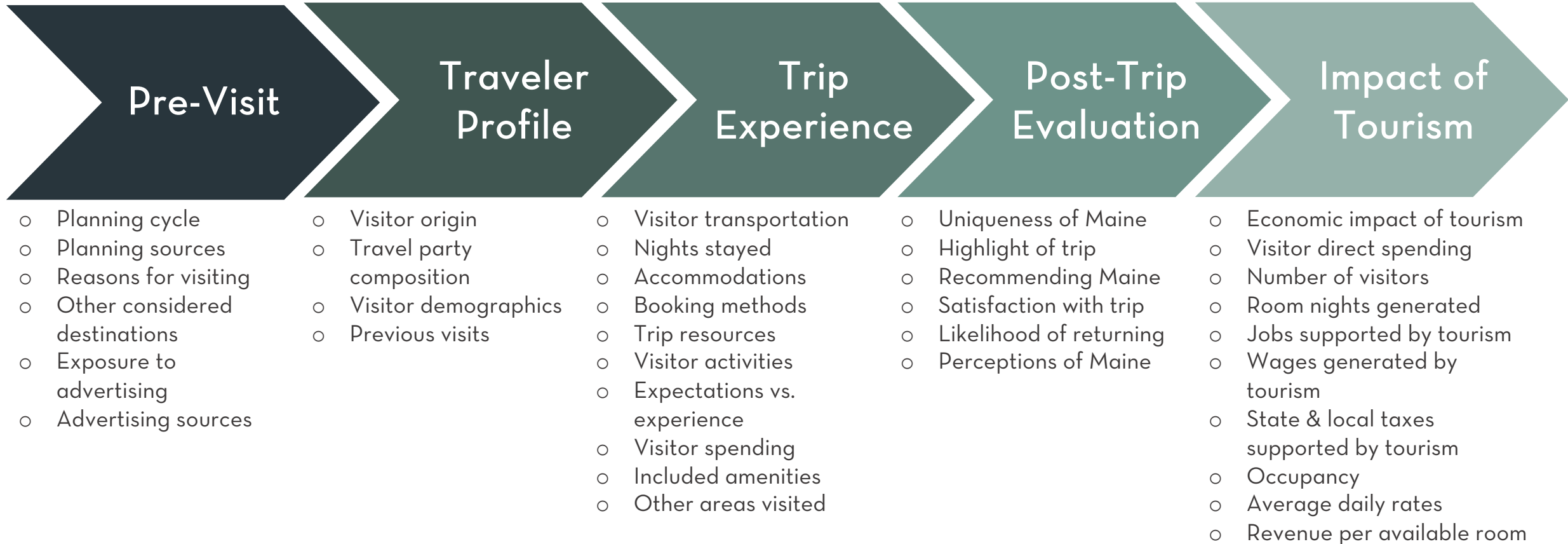


INTRODUCTION



STUDY OBJECTIVES – VISITOR JOURNEY

The objective of this study is to examine visitors' journeys in their trips to Maine and the subsequent economic impact of these journeys. This report examines trips to the **Downeast & Acadia** region.



METHODOLOGY



Visitor Tracking

655 interviews were completed with visitors to the Downeast & Acadia region online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between January 1st and December 31st, 2020.*

Economic Impact

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

Multiplier

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

*Due to the COVID-19 crisis, no in-person intercept surveys were conducted in April or May.

PRESENTATION VERSION



PRESENTATION VERSION

This section of the report includes **topline results** from the 2020 Economic Impact and Visitor Tracking Study. It provides a visually pleasing, easy-to-read overview of key findings, and is typically used to present the data to government officials, media, etc.

DOWNEAST & ACADIA



Compared to visitors to other regions, visitors to Downeast & Acadia region are more likely to:

- » Travel as a couple
- » Have higher incomes than visitors to other regions of Maine
- » Be first time visitors
- » Participate in active outdoor activities
- » Have a longer planning cycle
- » Visit Maine for a vacation
- » Travel from the Mid-Atlantic states
- » Have a college degree

TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending in 2020 generated

\$972,924,800

in economic impact to the Downeast &
Acadia region



DIRECT SPENDING

Visitors who took a trip to Downeast & Acadia in 2020 spent

\$661,853,600

in the region on accommodations,
restaurants, groceries, transportation,
attractions, entertainment, and shopping



VISITORS

Downeast & Acadia attracted

1,564,400

visitors in 2020



ROOM NIGHTS

Visitors to Downeast & Acadia
generated

1,112,100

room nights in paid
accommodations in 2020



JOBS SUPPORTED

The total economic impact of
tourism in Downeast & Acadia
supported

10,600

jobs in the region in 2020



WAGES GENERATED

Tourism in Downeast & Acadia supported

\$345,516,500

in wages and salaries in 2020



VISITORS CREATE JOBS

A Downeast & Acadia job
is supported by every

148

visitors

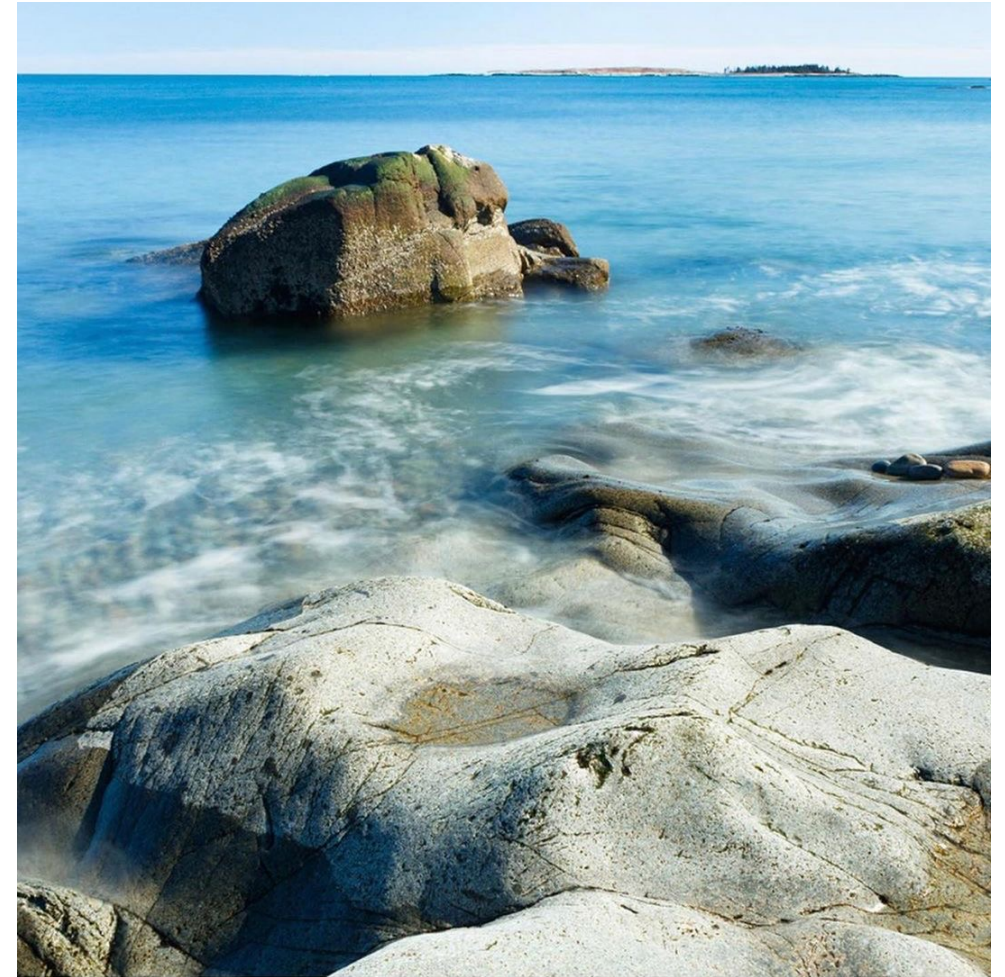


HOUSEHOLD SAVINGS

Visitors to Downeast & Acadia
saved local residents

\$2,662

in taxes per household in 2020



LODGING METRICS

| <i>Lodging Metrics</i> | <i>2020</i> |
|-------------------------------------|----------------------|
| <i>Occupancy (%)</i> | <i>36.7%</i> |
| <i>Average Daily Rate</i> | <i>\$151.70</i> |
| <i>Revenue per Available Room</i> | <i>\$55.67</i> |
| <i>Total Accommodations Revenue</i> | <i>\$168,706,200</i> |

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » 34% of visitors started planning their trip to Downeast & Acadia less than a month in advance
- » 42% of visitors booked their trip/decided to visit Downeast & Acadia less than a month in advance



TOP ONLINE TRIP PLANNING SOURCES*



42% Online search engines



20% Online travel agency



17% Hotel websites



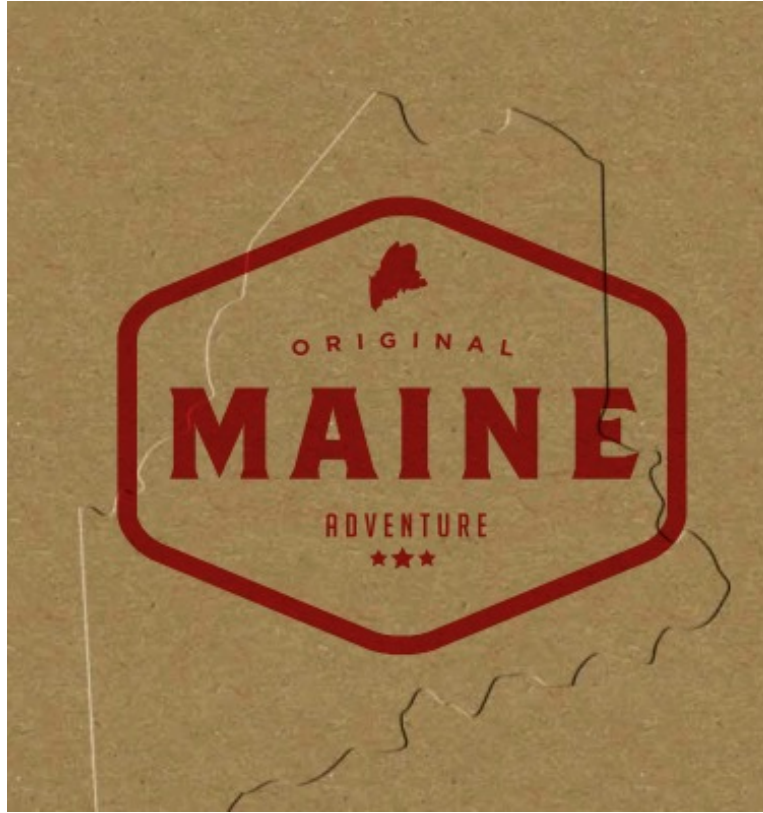
16% TripAdvisor

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



37% Advice from friends/family



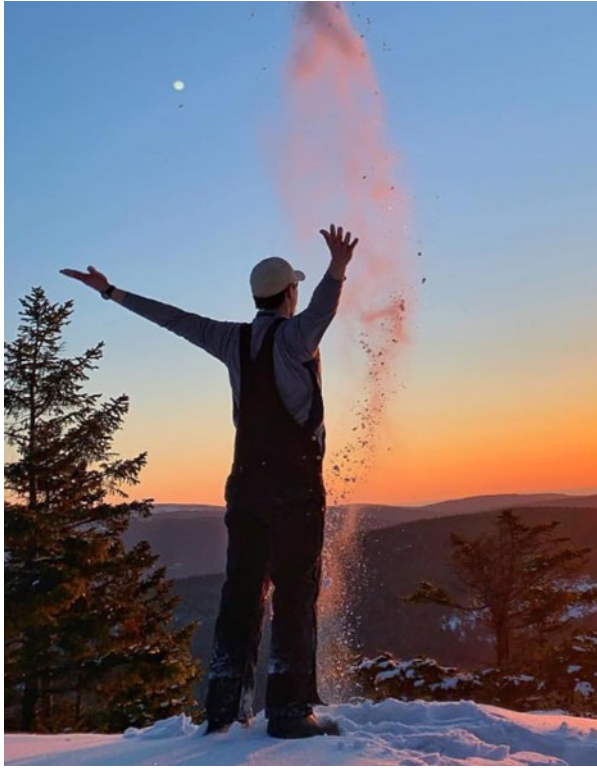
13% Travel guides/brochures



9% Travel books & magazines

*Multiple responses permitted.

TOP REASONS FOR VISITING*



53% Vacation



22% Relax and unwind



22% Sightseeing/touring



19% Visiting friends/
relatives

*Up to three responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » Nearly 2 in 3 visitors to Downeast & Acadia did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip



PRE-TRIP EXPOSURE TO ADVERTISING

- » 2 in 5 visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to Downeast & Acadia



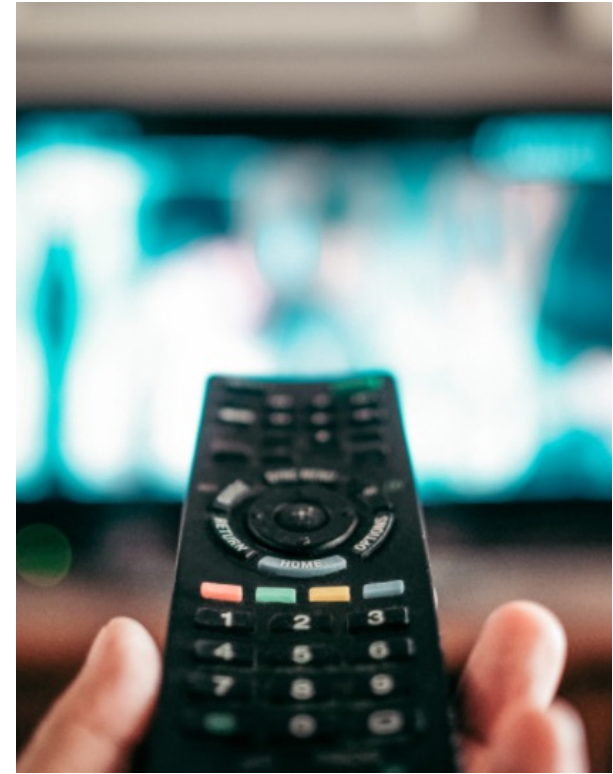
TOP SOURCES OF ADVERTISING EXPOSURE*



38% Social media



32% Internet



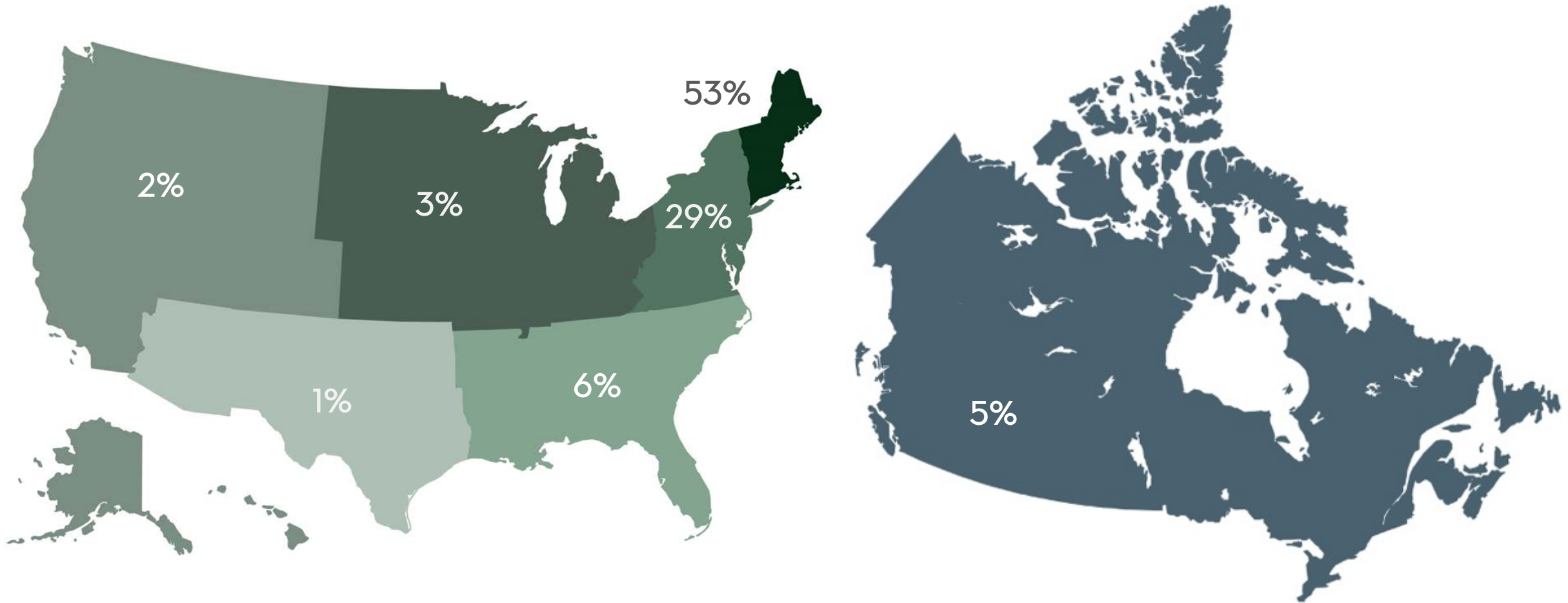
22% Cable or satellite
television

*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE

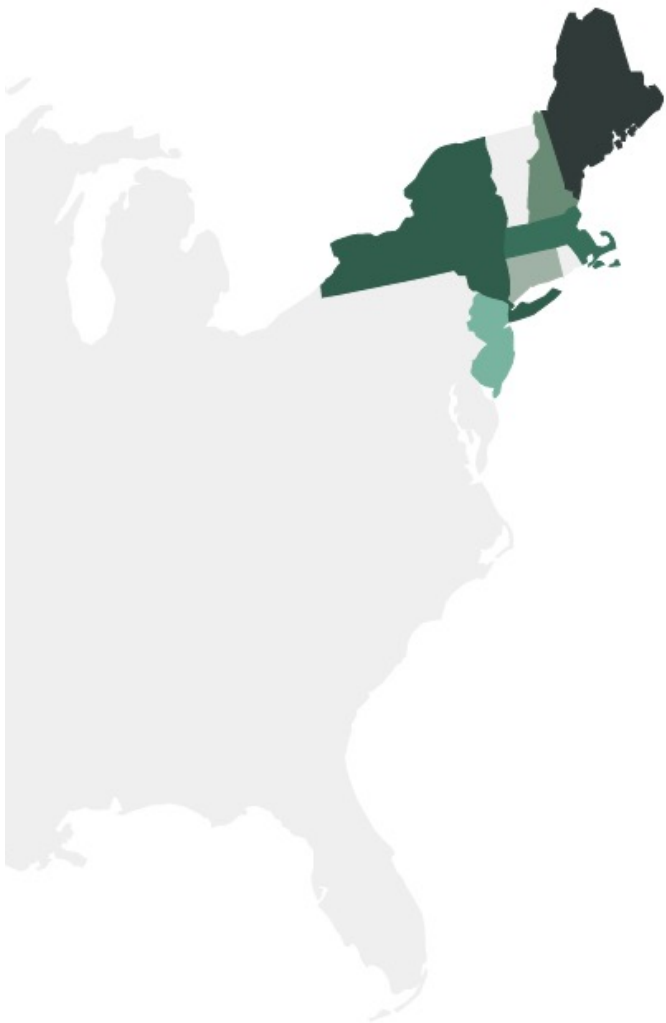


REGIONS OF ORIGIN



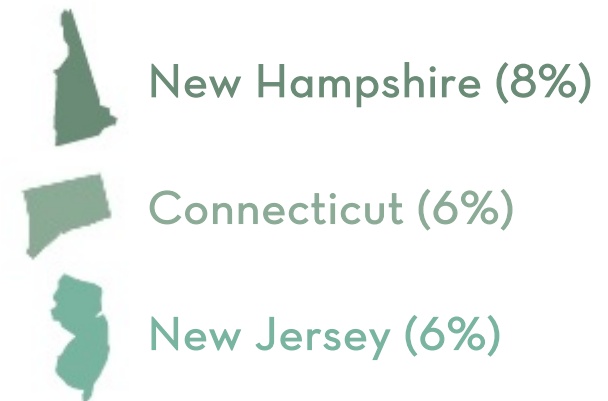
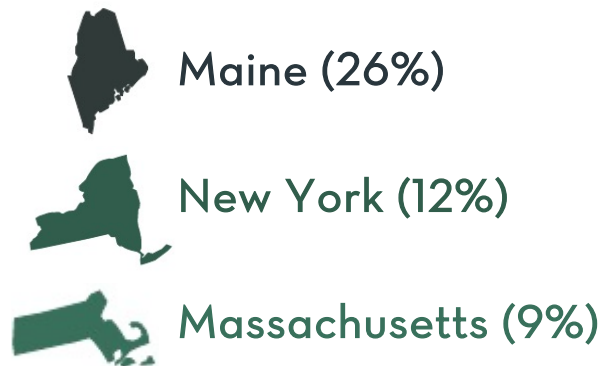
1% of visitors traveled to Downeast & Acadia from outside of the U.S. and Canada.

TOP ORIGIN STATES & PROVINCES



67%

of visitors traveled from 6 U.S. states, including from other regions of Maine.



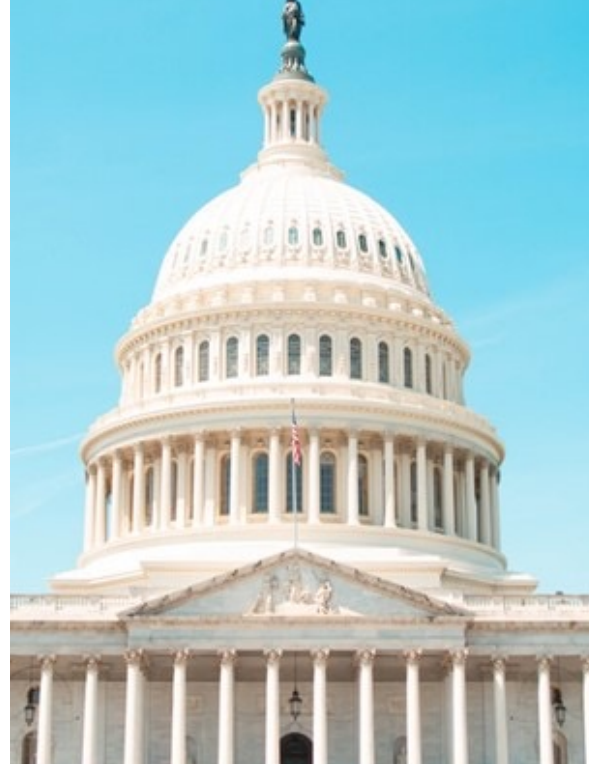
TOP ORIGIN MARKETS



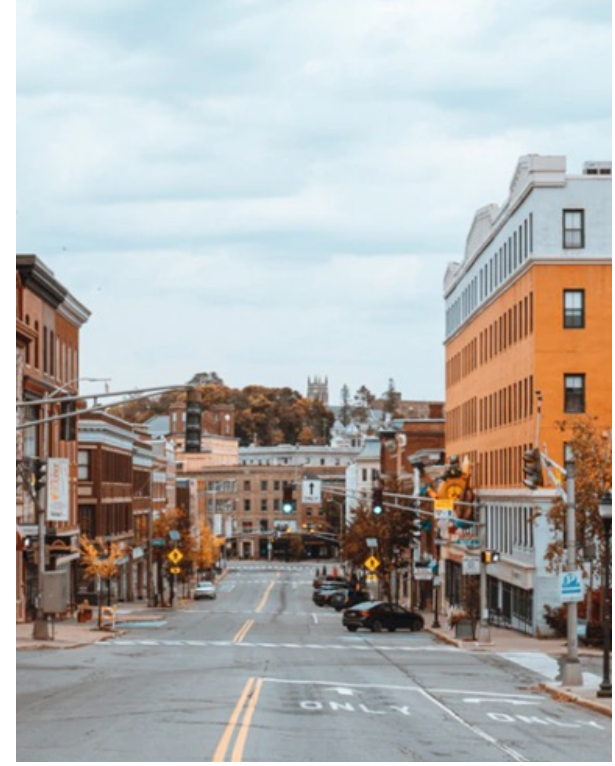
12% New York City, NY



5% Boston, MA



4% Washington D.C. -
Baltimore, MD



4% Bangor, ME

TRAVEL PARTIES

The typical visitor to Downeast & Acadia traveled with **2.7** people in their visitor party



1 in 5 visitors traveled with at least one person under the age of 18 in their travel party



VISITOR PROFILE



55% Female*



75% College/technical graduate



76% Married/domestic partnership



57% Employed full-time



90% White/Caucasian



\$93,400 annual household income

*Of visitors interviewed

VISITOR PROFILE: DAY TRIPPERS

- » The typical day tripper¹:
 - » Earned \$62,500 per year
 - » Was female (54%)
 - » Had a college/technical degree (65%)
 - » Was married or living with their partner (61%)
 - » Was employed full-time (53%)
 - » Was White/Caucasian (95%)
 - » 25% traveled with children
 - » Was from Maine (81%), other northeastern U.S. states (9%), and Canada (9%)



¹ Did not stay overnight in Downeast & Acadia during their trip.

VISITOR PROFILE: OVERNIGHT VISITORS

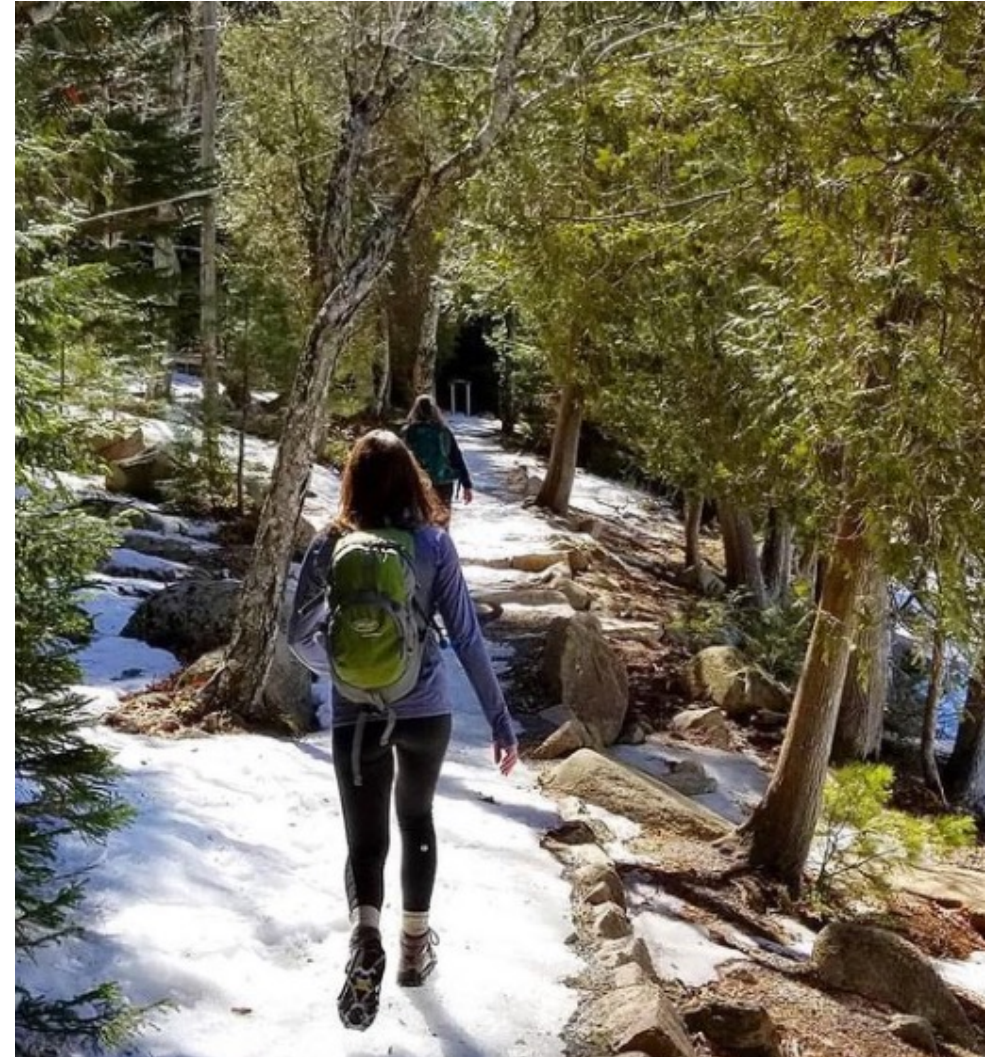
- » The typical overnight visitor¹:
 - » Earned \$96,000 per year
 - » Was female (55%)
 - » Had a college/technical degree (76%)
 - » Was married or living with their partner (77%)
 - » Was employed full-time (57%)
 - » Was White/Caucasian (89%)
 - » 20% traveled with children
 - » Was from Maine (17%) and other northeastern U.S. states (51%)



¹ Stayed one or more nights in Downeast & Acadia during their trip.

NEW & RETURNING VISITORS

- » 27% of visitors to Downeast & Acadia were traveling in Maine for the first time
- » 27% of visitors to Downeast & Acadia had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

» 9 in 10 visitors drove to
Downeast & Acadia



NIGHTS STAYED

- » 4 in 5 visitors to Downeast & Acadia stayed overnight
- » Typical visitors to Downeast & Acadia stayed 5.6 nights



TOP ACCOMMODATIONS



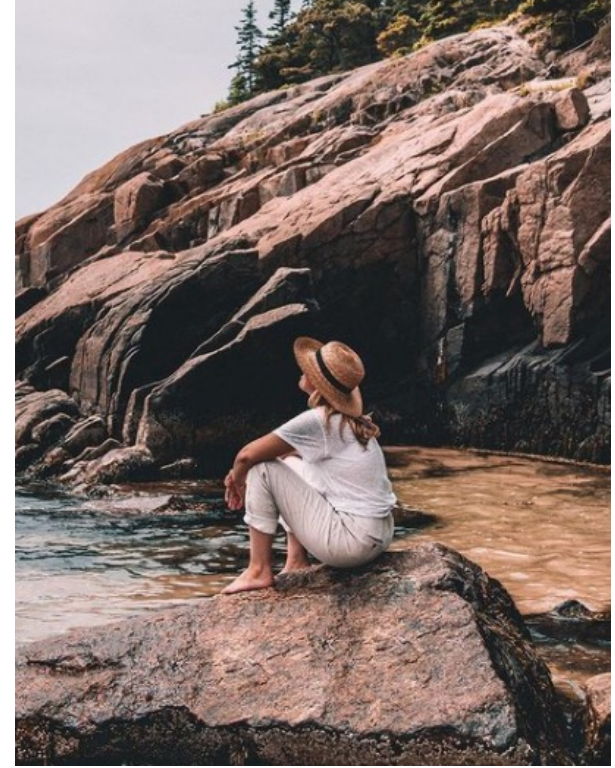
31% Hotel/motel/resort



11% Vacation rental home



10% Friends/family home



20% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*



38% Navigation websites/apps



22% Restaurant website/app



18% Materials from
hotel/campground

*Multiple responses permitted.

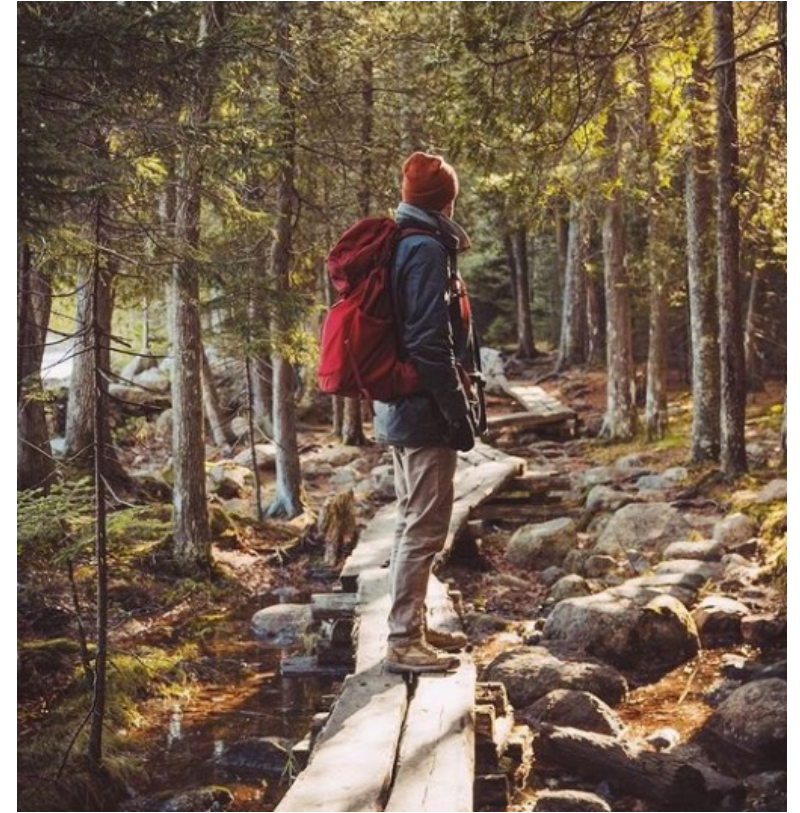
TOP VISITOR ACTIVITIES*



73% Food/beverage/culinary



71% Touring/sightseeing



66% Active outdoor activities

*Multiple responses permitted.

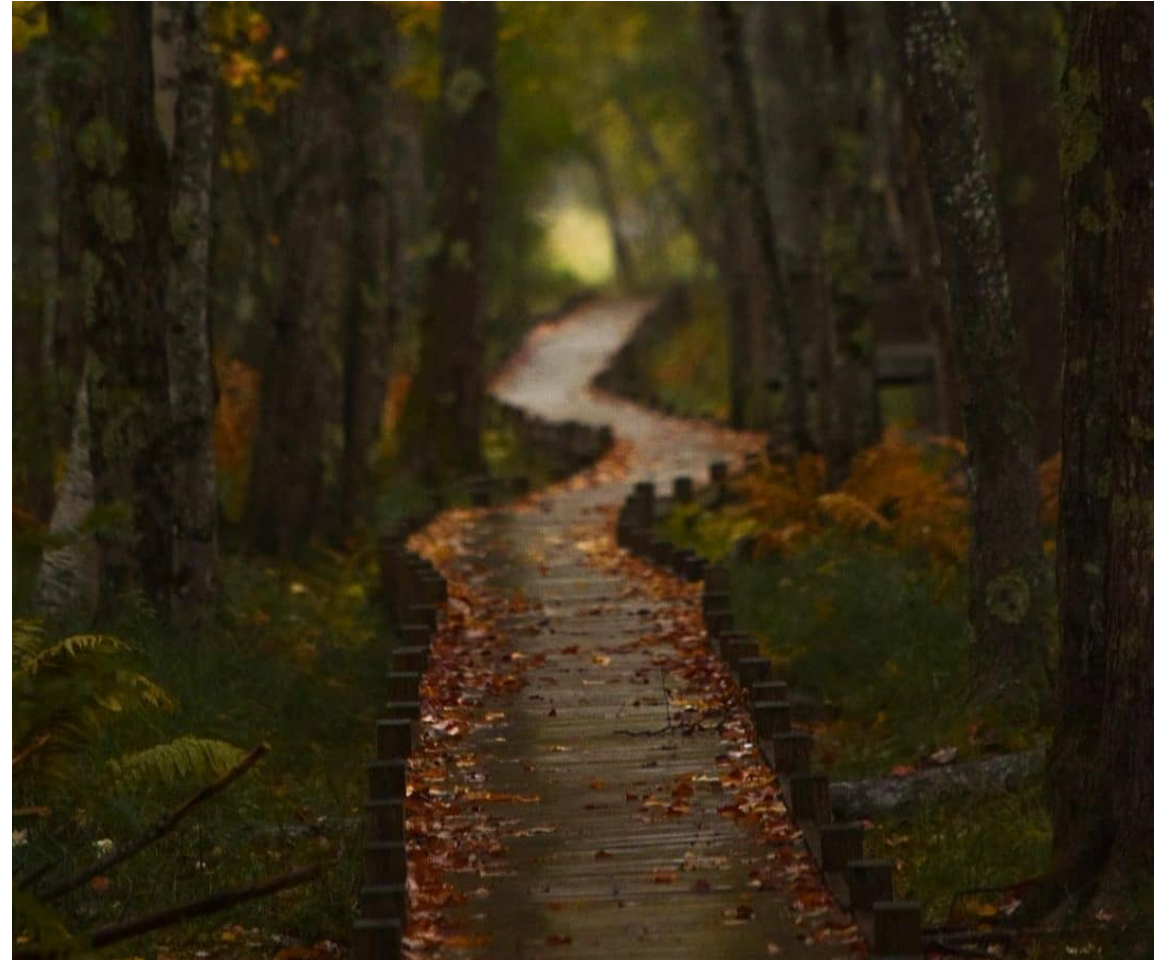
VISITING OTHER STATES & PROVINCES

- » 3 in 4 visitors to Downeast & Acadia did not visit any other U.S. state or Canadian province
- » Downeast & Acadia 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

- » 4 in 5 Downeast & Acadia visitors traveled to other regions during their trip
- » 1 in 3 visitors to Downeast & Acadia also visited the Greater Portland & Casco Bay region



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » 99% of visitors to Downeast & Acadia would recommend Maine to a friend or relative as a vacation destination
- » 98% of Downeast & Acadia visitors would recommend the region as a place to visit or vacation



LIKELIHOOD OF RETURNING TO MAINE

» 97% of visitors to Downeast & Acadia will return to Maine for a future visit or vacation



DETAILED FINDINGS



DETAILED FINDINGS

This section of the report includes **detailed results** from the 2020 Economic Impact and Visitor Tracking Study, and can be used to take a deeper dive into the data.

TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT INDICATORS

| <i>Economic Impact</i> | <i>2020</i> |
|------------------------------|----------------------|
| <i>Visitors</i> | <i>1,564,400</i> |
| <i>Room nights generated</i> | <i>1,112,100</i> |
| <i>Direct expenditures</i> | <i>\$661,853,600</i> |
| <i>Total economic impact</i> | <i>\$972,924,800</i> |

IMPACT OF TOURISM

| <i>Maine Jobs</i> | <i>2020</i> |
|--|---------------|
| <i>Jobs generated (direct)</i> | <i>8,100</i> |
| <i>Total impact of tourism on Maine jobs</i> | <i>10,600</i> |

| <i>Maine Wages</i> | <i>2020</i> |
|---|----------------------|
| <i>Wages paid (direct)</i> | <i>\$259,448,200</i> |
| <i>Total impact of tourism on Maine wages</i> | <i>\$345,516,500</i> |

IMPACT OF TOURISM

| <i>Return on Investment</i> | <i>2020</i> |
|--|---------------------|
| <i>Visitors per job supported</i> | <i>148</i> |
| <i>State & local taxes supported</i> | <i>\$99,709,000</i> |
| <i>Tax savings per household</i> | <i>\$2,662</i> |

LODGING METRICS

| <i>Lodging Metrics</i> | <i>2020</i> |
|-------------------------------------|----------------------|
| <i>Occupancy (%)</i> | <i>36.7%</i> |
| <i>Average Daily Rate</i> | <i>\$151.70</i> |
| <i>Revenue per Available Room</i> | <i>\$55.67</i> |
| <i>Total Accommodations Revenue</i> | <i>\$168,706,200</i> |

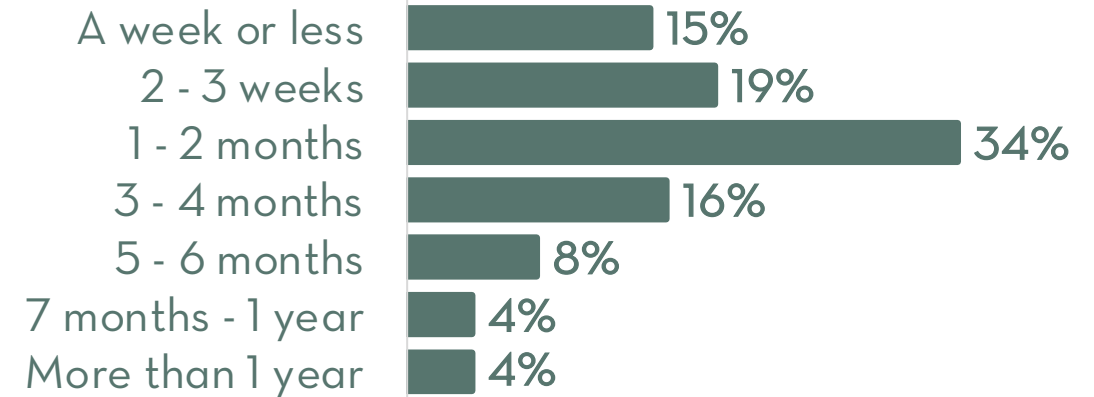
TRIP PLANNING CYCLE : PRE-VISIT



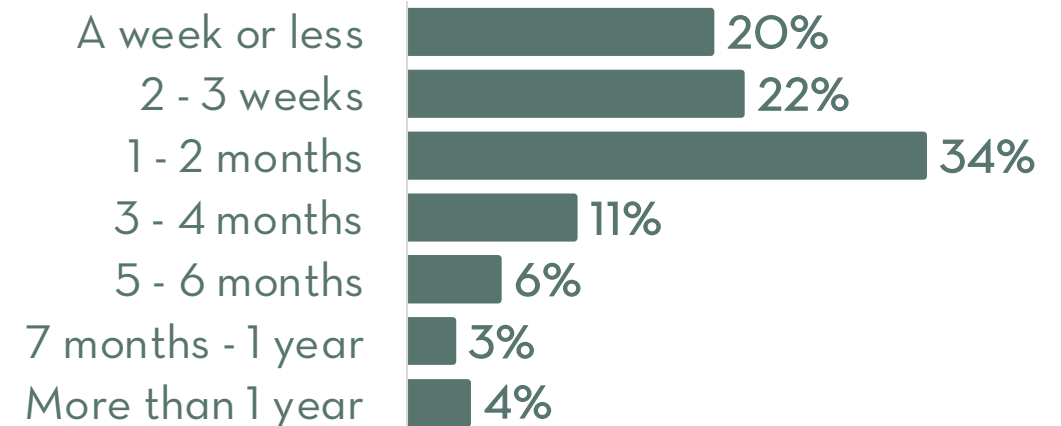
TRIP PLANNING CYCLE

- » 34% of visitors to Downeast & Acadia started planning their trip within a month of their trip
- » Very few visitors (16%) have planning windows longer than 4 months
- » 42% of visitors have a booking window of less than 1 month
- » Very few visitors (13%) booked accommodations 5+ months in advance

Beginning of Trip Planning Cycle

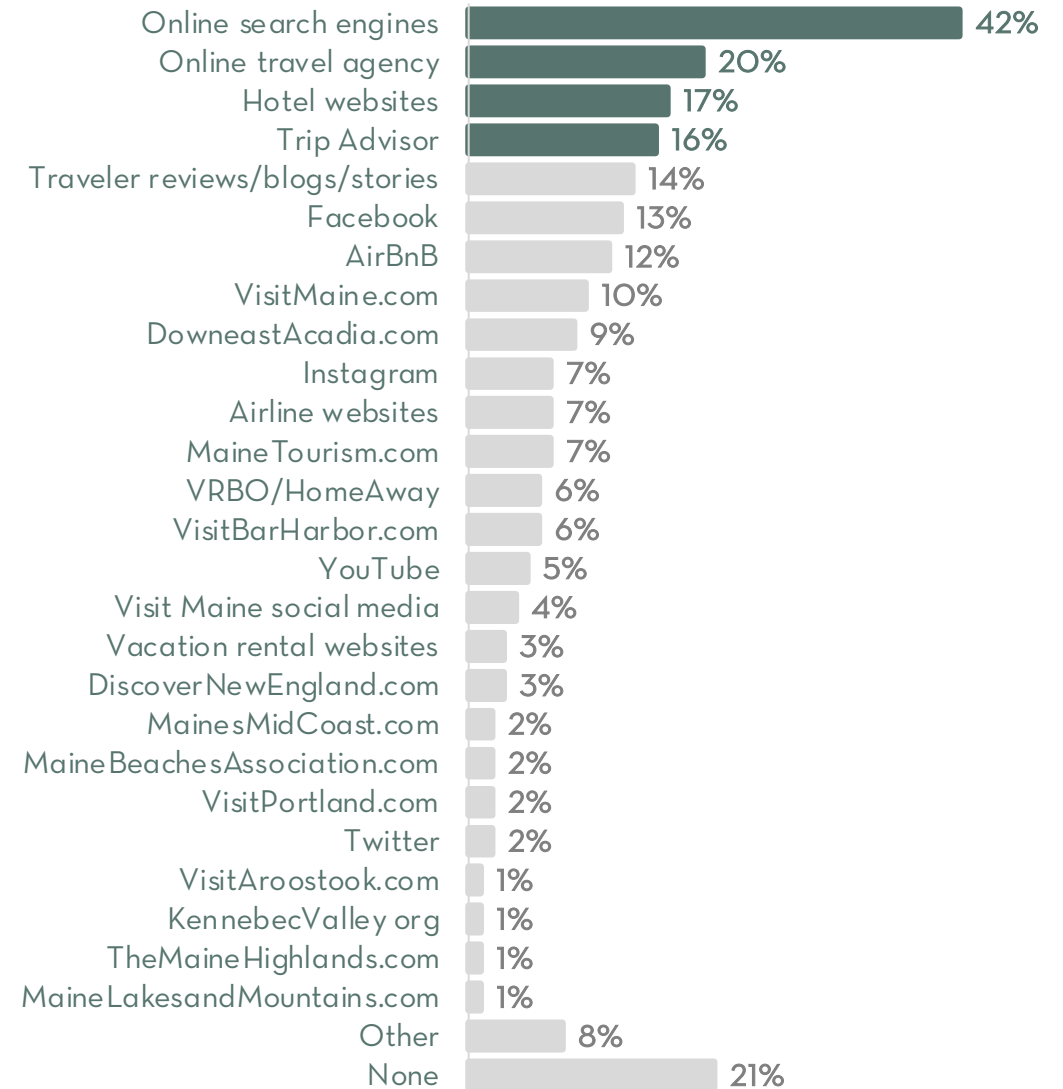


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

- » 4 in 5 visitors used one or more online resources to help them plan their trip to Downeast & Acadia
- » More than 2 in 5 visitors used an online search engine, such as Google, to help them plan their trip to Downeast & Acadia
- » 1 in 10 visitors used VisitMaine.com, and 7% used MaineTourism.com



*Multiple responses permitted.

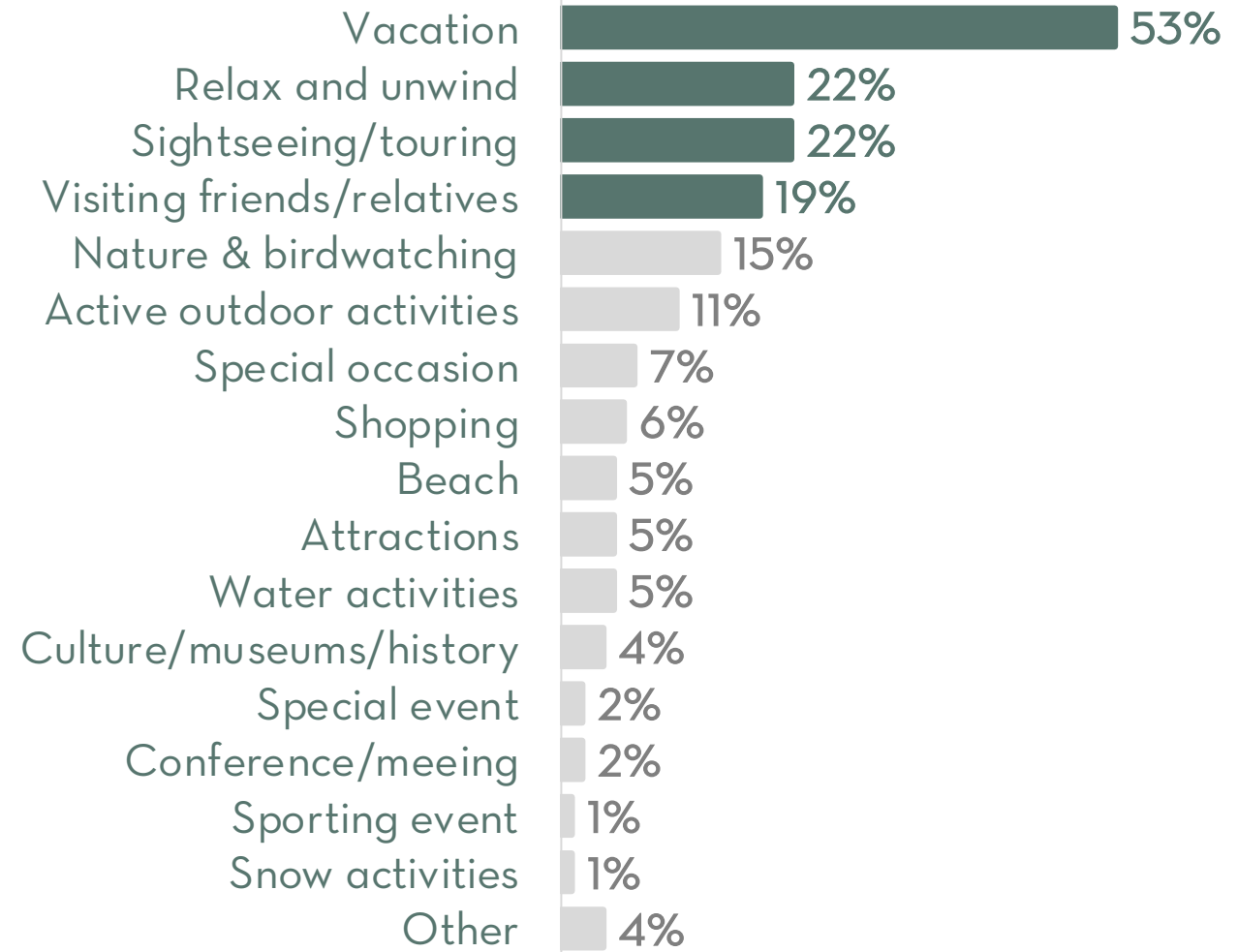
OTHER TRIP PLANNING SOURCES*

- » 37% of visitors relied on advice from their friends and family to help them plan their trip to Downeast & Acadia
- » Over 2 in 5 visitors did not use any other resources to help them plan their trip to Downeast & Acadia



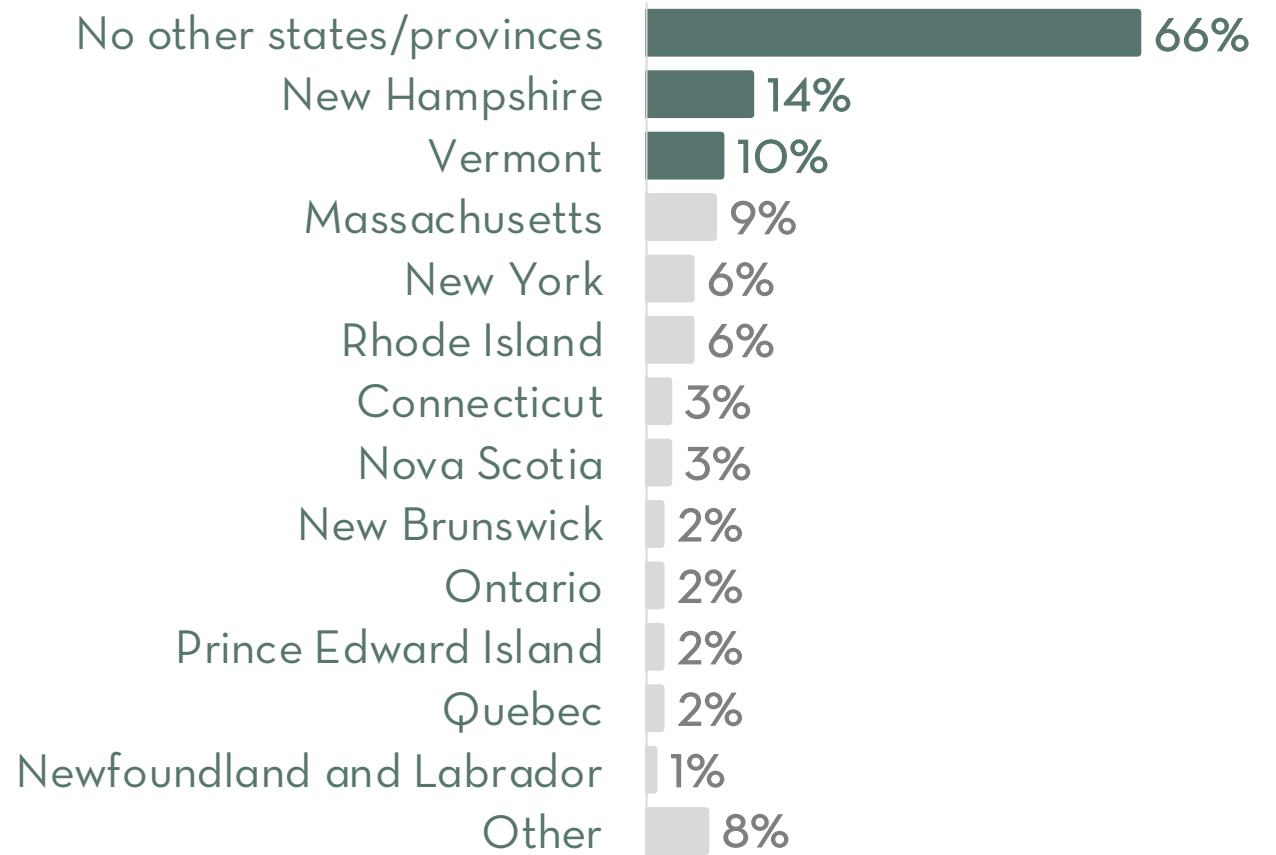
REASONS FOR VISITING*

- » Over half of visitors traveled to the Downeast & Acadia region for a vacation
- » 22% of visitors came to Downeast & Acadia to sightsee and/or relax, and 19% came to visit their friends and relatives



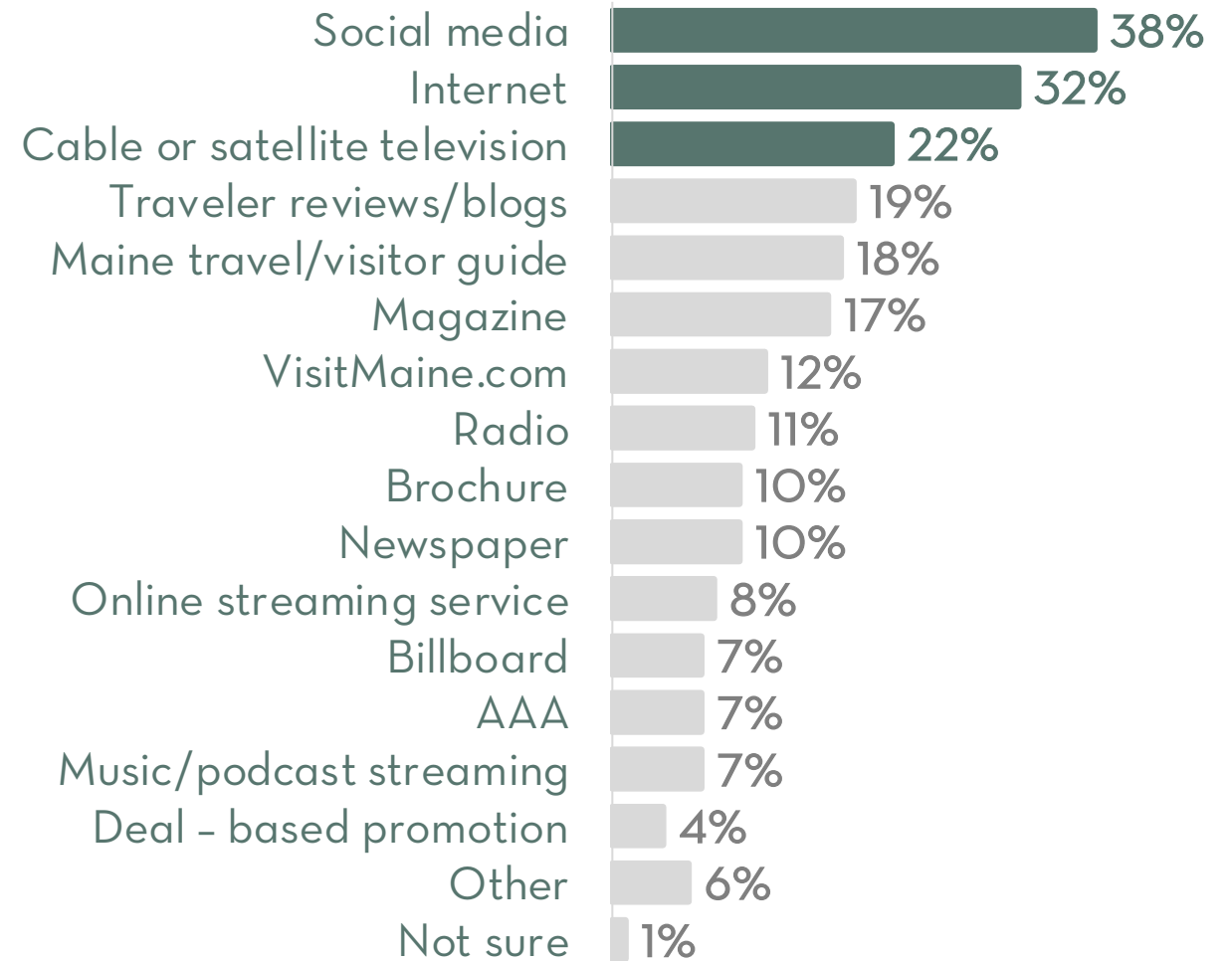
OTHER STATES & PROVINCES CONSIDERED*

- » Nearly 2 in 3 visitors considered visiting **ONLY** Maine while planning their trip to Downeast & Acadia
- » Visitors to Downeast & Acadia were **more likely** to consider visiting nearby U.S. states rather than visiting a Canadian province



PRE-TRIP EXPOSURE TO ADVERTISING*

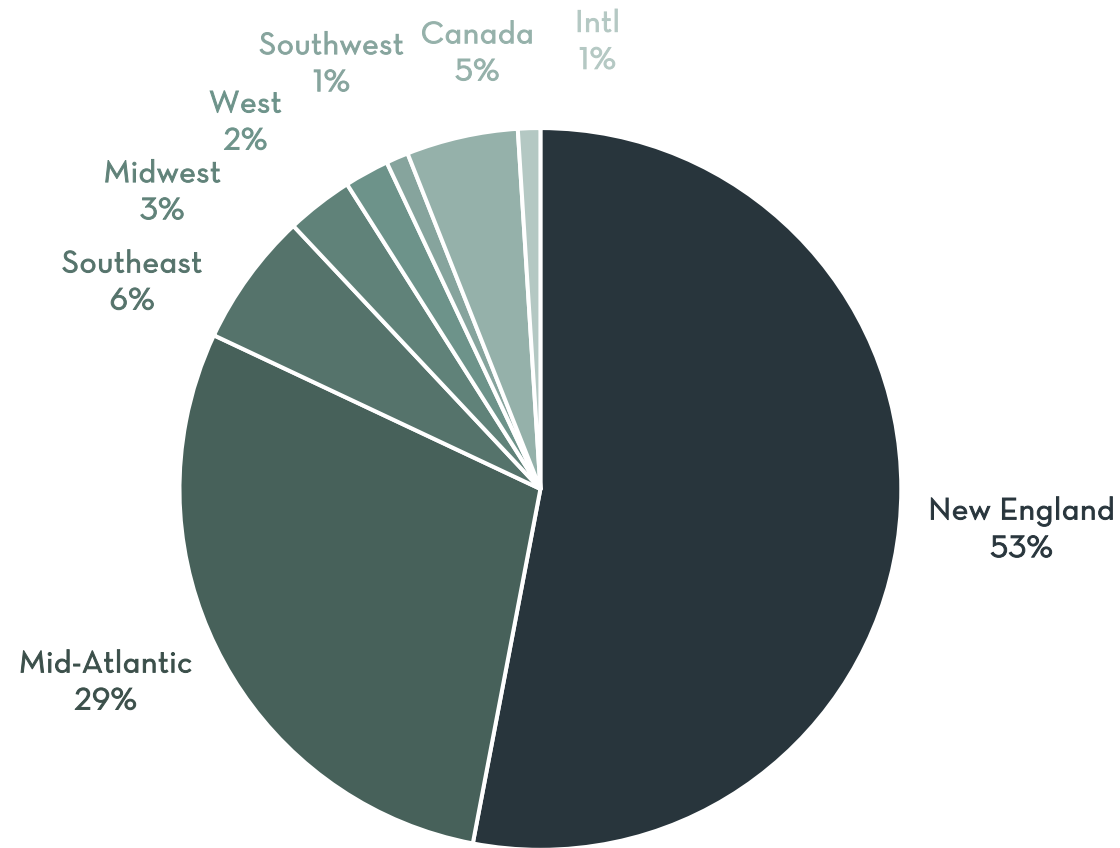
- » 41% of visitors noticed advertising or promotions for Maine prior to their trip to Downeast & Acadia
- » Visitors who were exposed to this advertising primarily saw it on **social media**, the **internet**, or **television**
- » Visitors were more likely to notice Maine promotions on **digital** media rather than on **traditional** media



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **47%** of visitors to Downeast & Acadia were from Maine, New Hampshire or Massachusetts
- » **83%** of visitors to Downeast & Acadia came from **12** U.S. states
- » **1 in 4** visitors to Downeast & Acadia were traveling from another region of Maine

| State/Country | Percent |
|---------------|---------|
| Maine | 26% |
| New York | 12% |
| Massachusetts | 9% |
| New Hampshire | 8% |
| Connecticut | 6% |
| New Jersey | 6% |
| Florida | 5% |
| Pennsylvania | 3% |
| Maryland | 2% |
| Texas | 2% |
| Vermont | 2% |
| Virginia | 2% |

TOP ORIGIN MARKETS

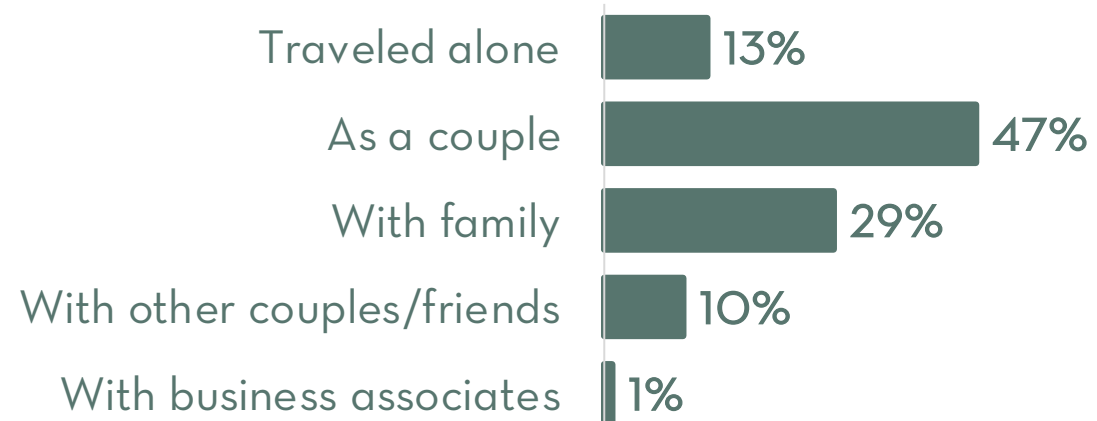
- » More visitors traveled to Downeast & Acadia from the **New York City metro area** than from any other market
- » **3 in 10** visitors to Downeast & Acadia traveled from **6** markets in Maine and other U.S. states

| Market | Percent |
|---------------------------------|---------|
| New York City, NY | 12% |
| Boston, MA | 5% |
| Washington D.C. - Baltimore, MD | 4% |
| Bangor, ME | 4% |
| Philadelphia, PA | 3% |
| Buffalo - Rochester, NY | 2% |

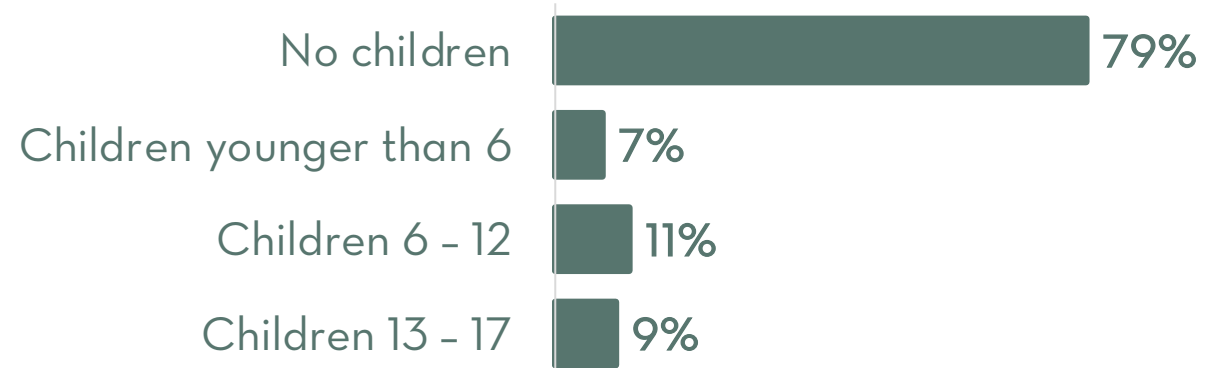
TRAVEL PARTIES

- » Typical visitors to Downeast & Acadia traveled with a party of **2.7** people
- » **13%** of visitors traveled alone
- » Only **1 in 5** visitors traveled in Downeast & Acadia with one or more children in their travel party

Travel Party Composition



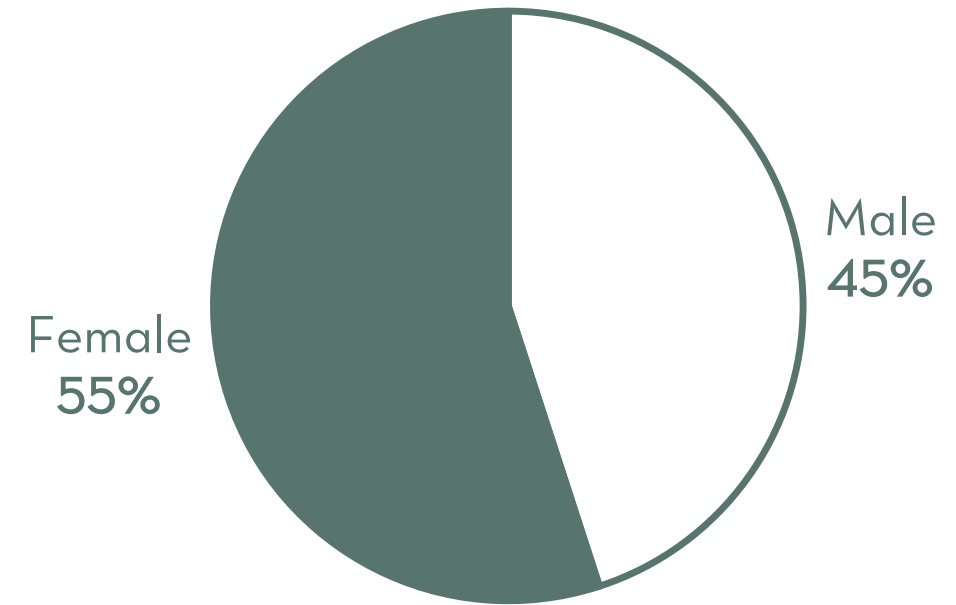
*Children in Travel Party**



*Multiple responses permitted.

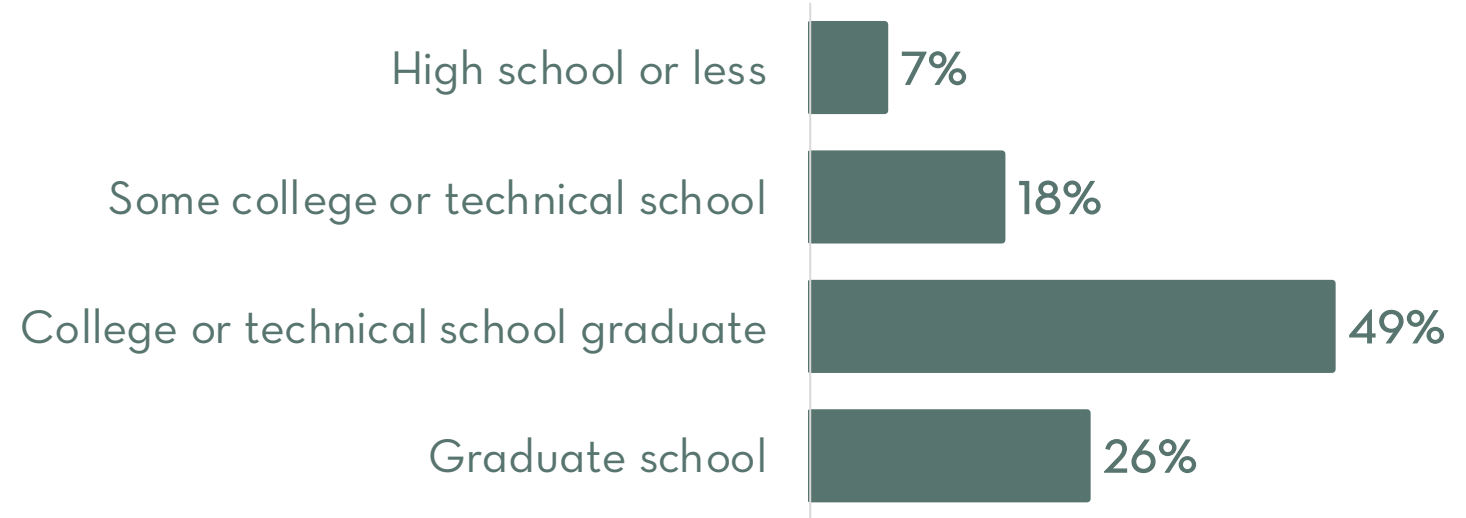
GENDER

- » 55% of visitors to Downeast & Acadia who were interviewed were female



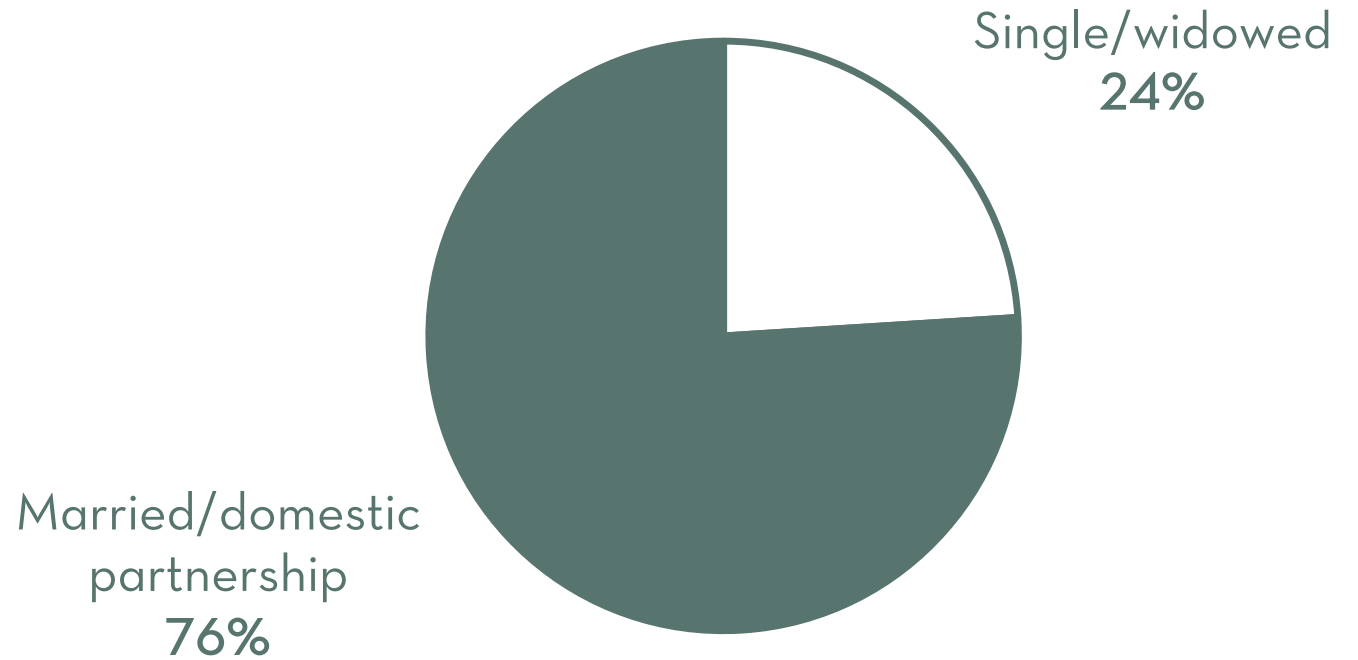
EDUCATIONAL ATTAINMENT

- » Downeast & Acadia visitors have substantial formal educations, with over **3 out of 4** having at least a college or technical school degree, and over **1 in 4** possessing a graduate degree



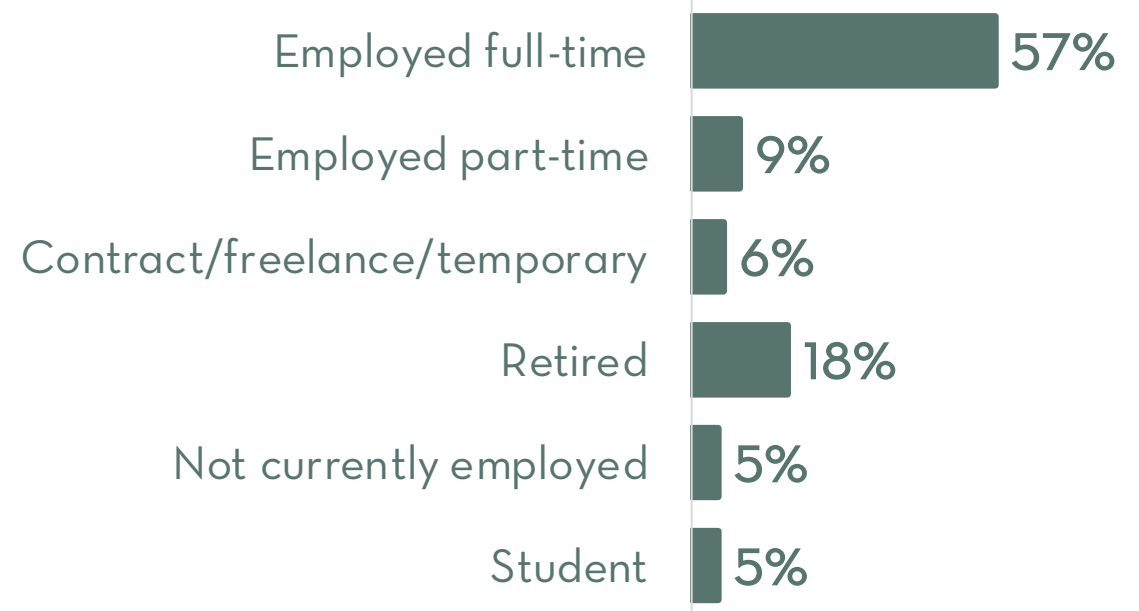
MARITAL STATUS

- » 3 in 4 visitors to Downeast & Acadia were married or living with their partner



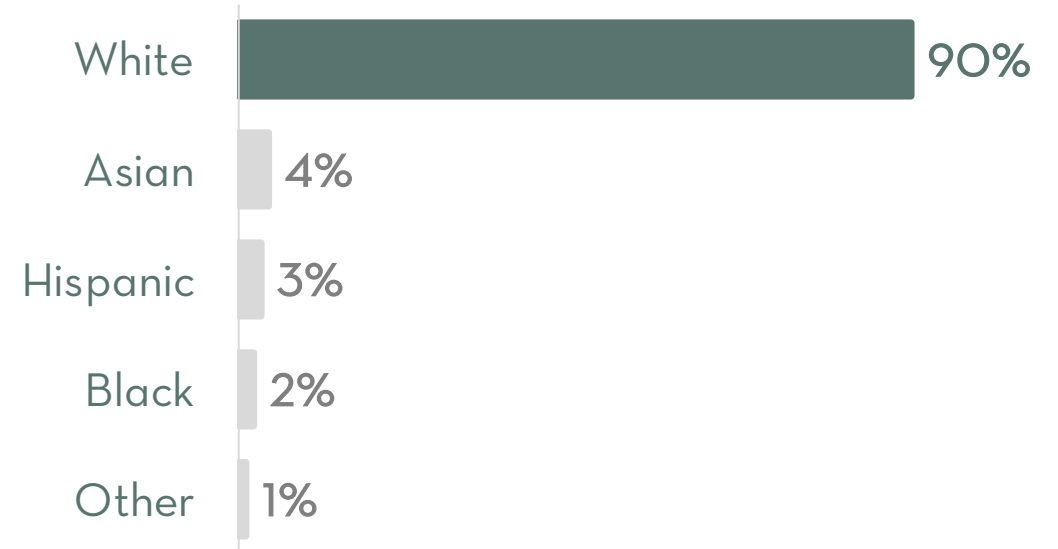
EMPLOYMENT STATUS

- » Over **7 in 10** visitors to Downeast & Acadia were employed, most full-time



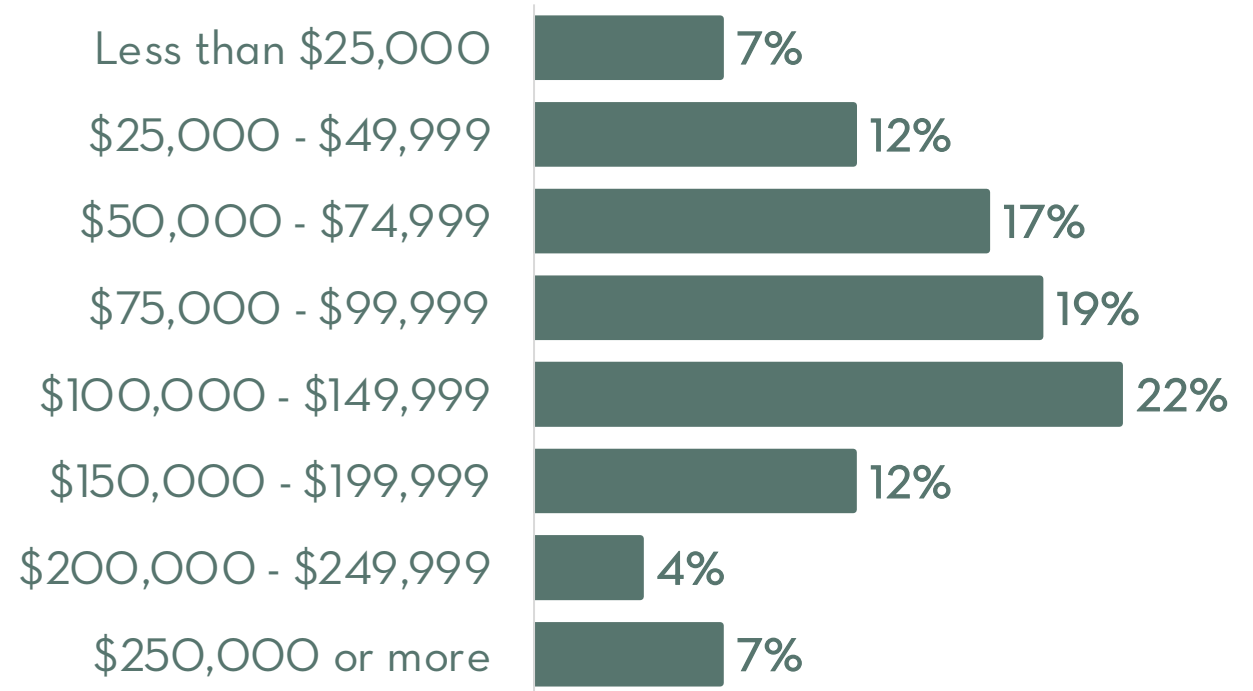
RACE & ETHNICITY

» 9 in 10 visitors to Downeast & Acadia were White/Caucasian



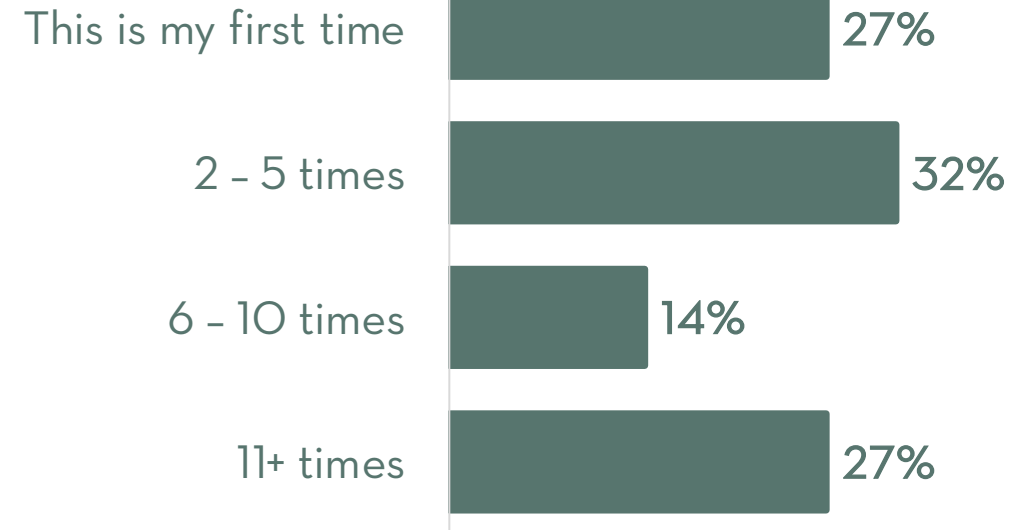
HOUSEHOLD INCOME

- » Typical visitors to Downeast & Acadia earned **\$93,400** per year in household income
- » **23%** of Downeast & Acadia visitors have household incomes that exceed \$150,000



NEW & RETURNING VISITORS

- » **27%** of visitors to Downeast & Acadia were traveling in Maine for the first time
- » **27%** of visitors to Downeast & Acadia had previously traveled in Maine more than 10 times

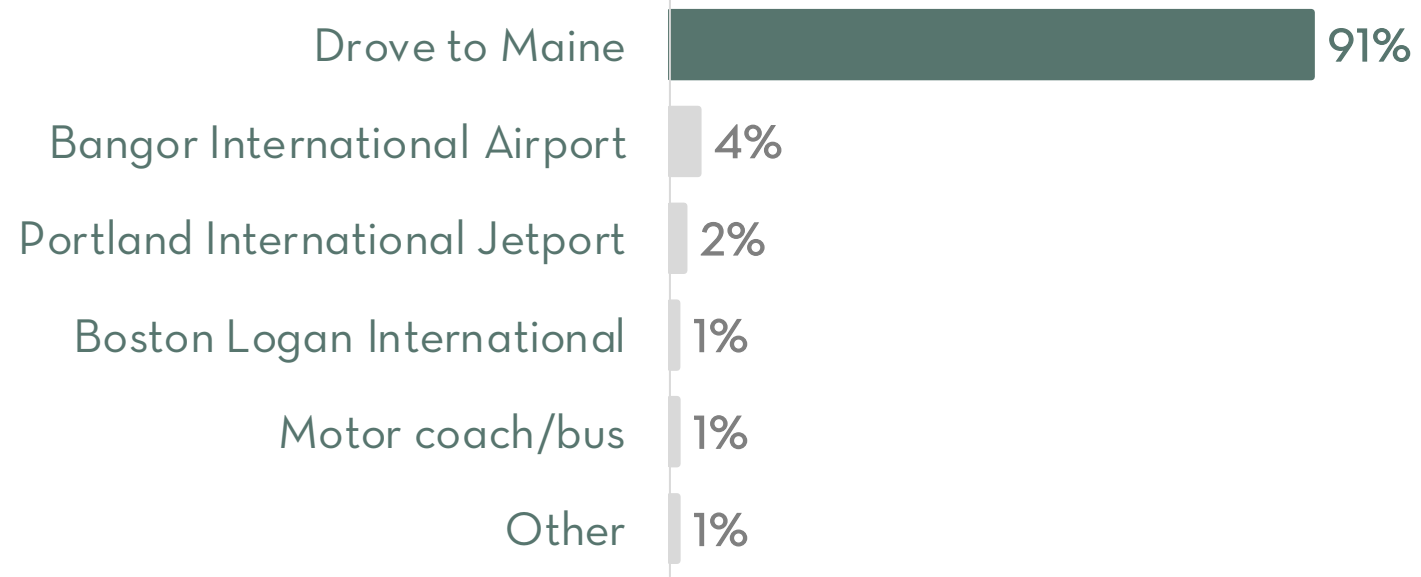


TRIP PLANNING CYCLE : TRIP EXPERIENCE



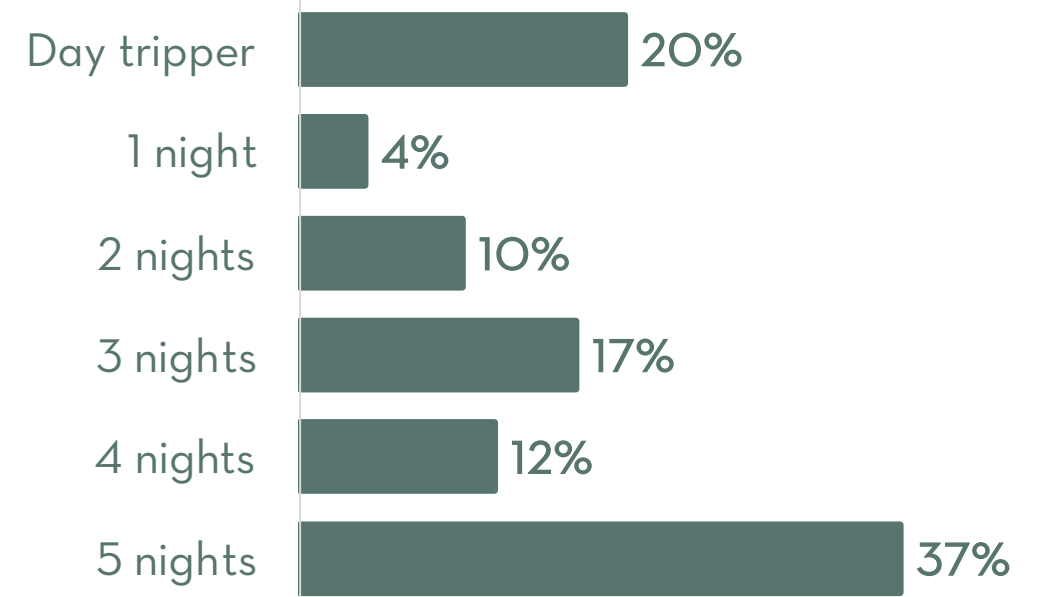
MODES OF TRANSPORTATION

- » Downeast & Acadia is a drive-market for most visitors as **9 out of 10** choose to travel by car rather than by plane, motor coach/bus, or train
- » **Most** Downeast & Acadia visitors who flew to Maine arrived at Bangor International Airport or Portland International Jetport



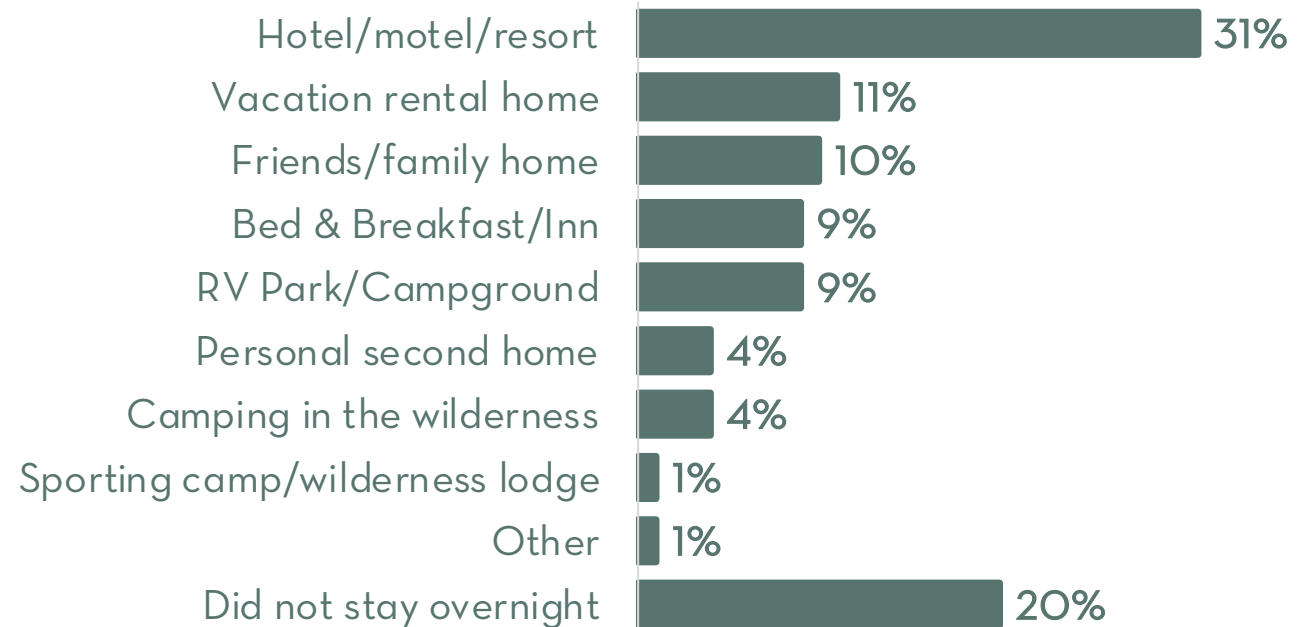
NIGHTS STAYED

- » 4 in 5 visitors to Downeast & Acadia stayed one night or more in Maine accommodations during their trip
- » Typical visitors to Downeast & Acadia stayed 5.6 nights in Maine accommodations during their trip
- » 37% of visitors to Downeast & Acadia stayed 5 or more nights in Maine



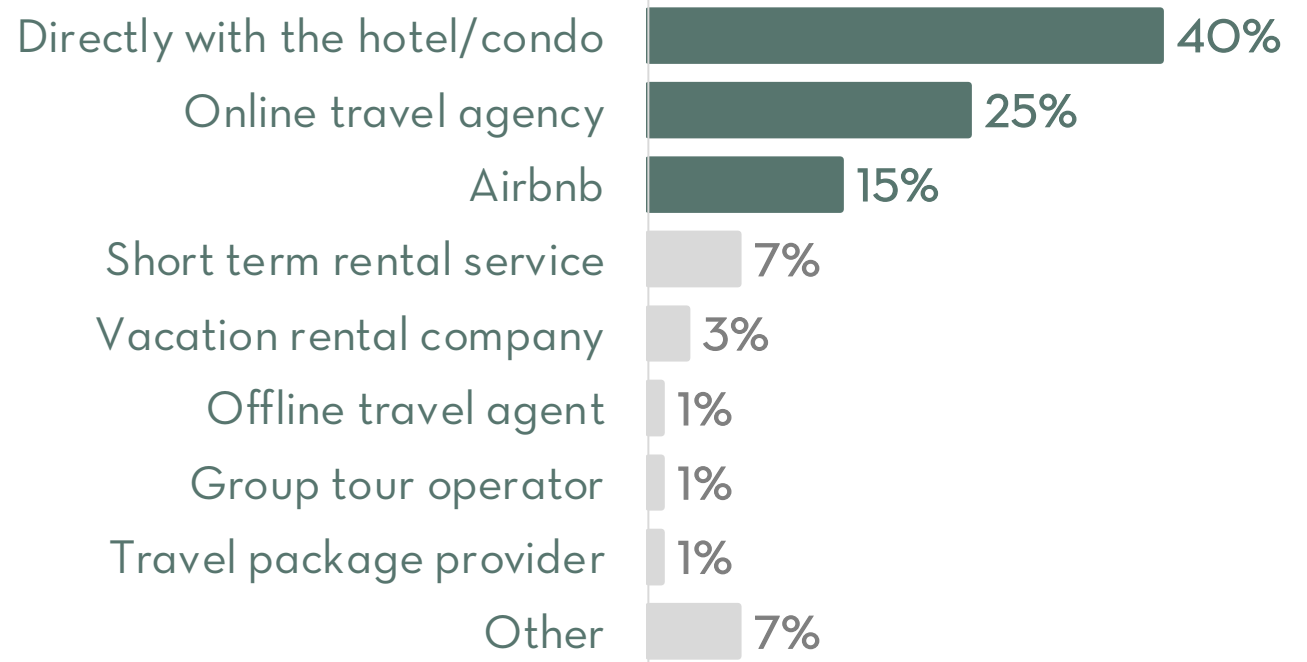
ACCOMMODATIONS

- » **3 in 10** visitors to Downeast & Acadia stayed overnight in a hotel, motel, or resort
- » **1 in 10** visitors to Downeast & Acadia stayed overnight in a vacation rental home



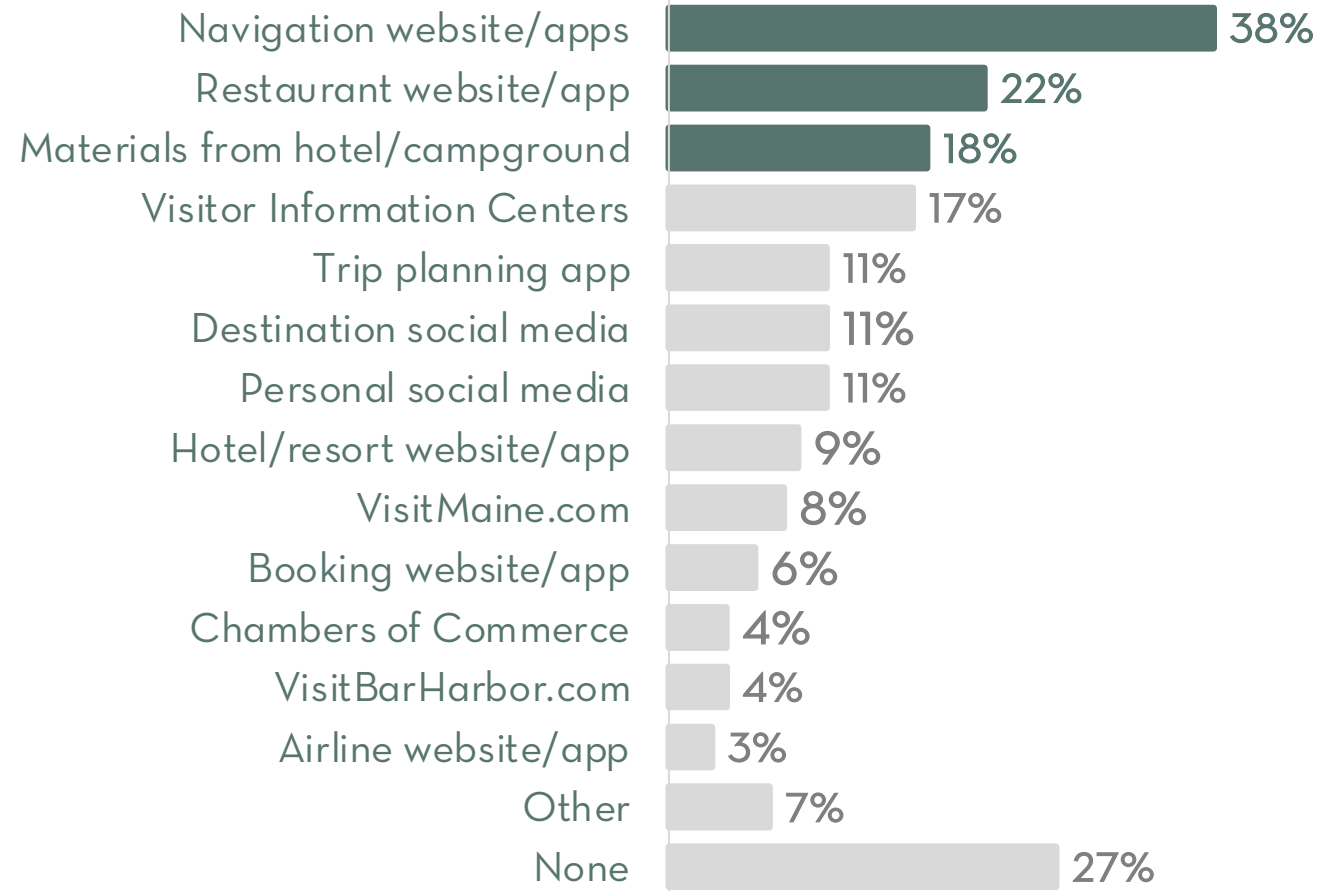
BOOKING METHODS

- » **2 in 3** visitors to Downeast & Acadia stayed overnight in paid accommodations during their trip in Maine
- » **2 in 5** visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



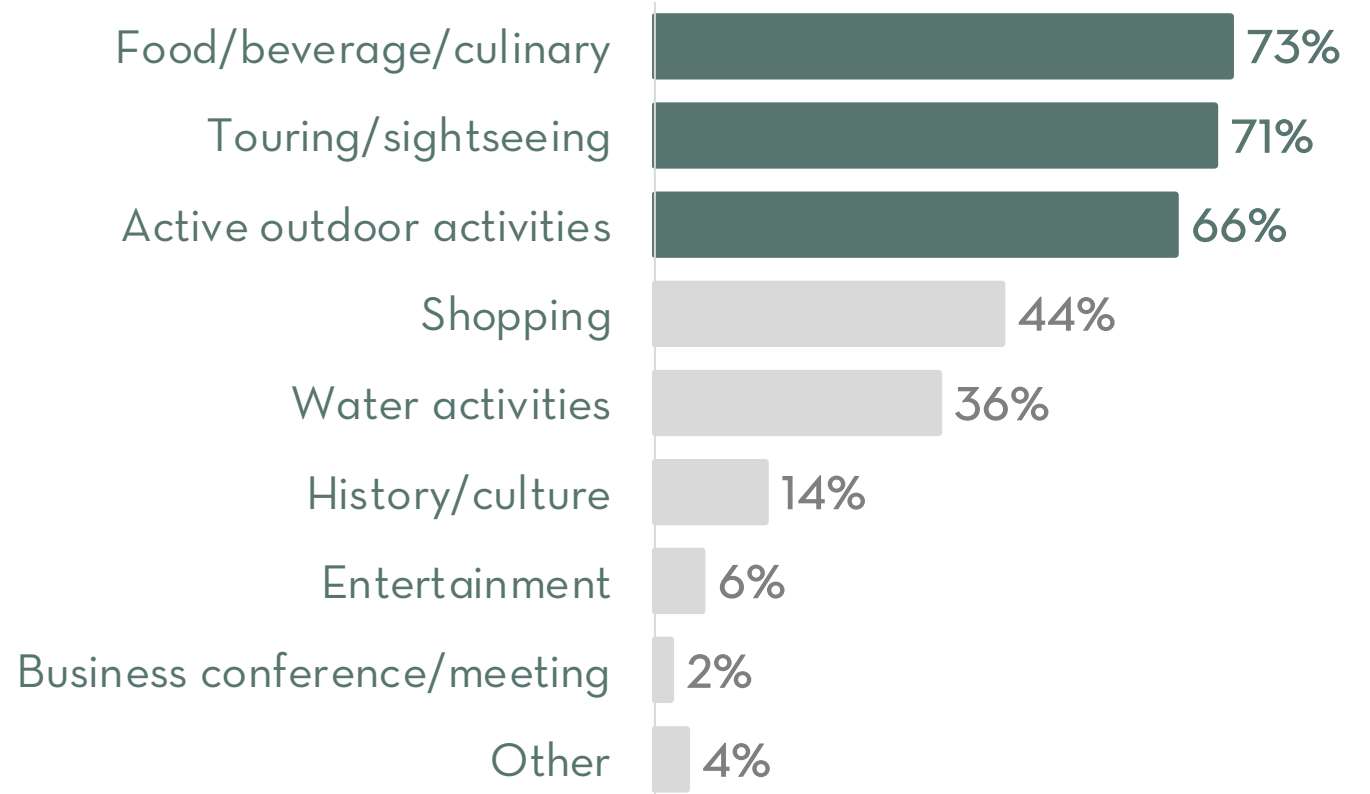
IN-MARKET VISITOR RESOURCES*

- » Visitors were **more likely** to rely on navigation websites and apps to plan activities in-market
- » **23%** of visitors used Visitor Information Centers
- » Over **1 in 4** visitors did not use any resources to plan activities while they were in Downeast & Acadia

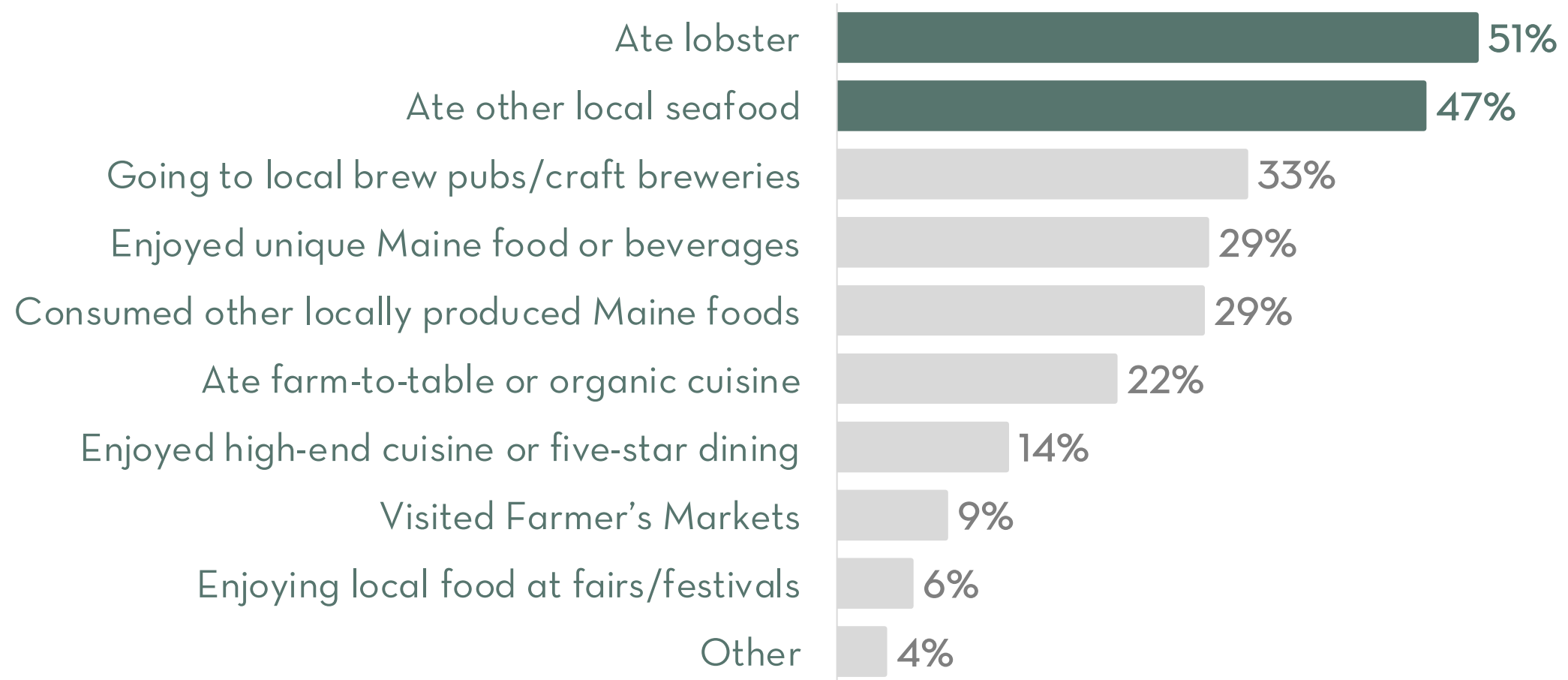


VISITOR ACTIVITIES*

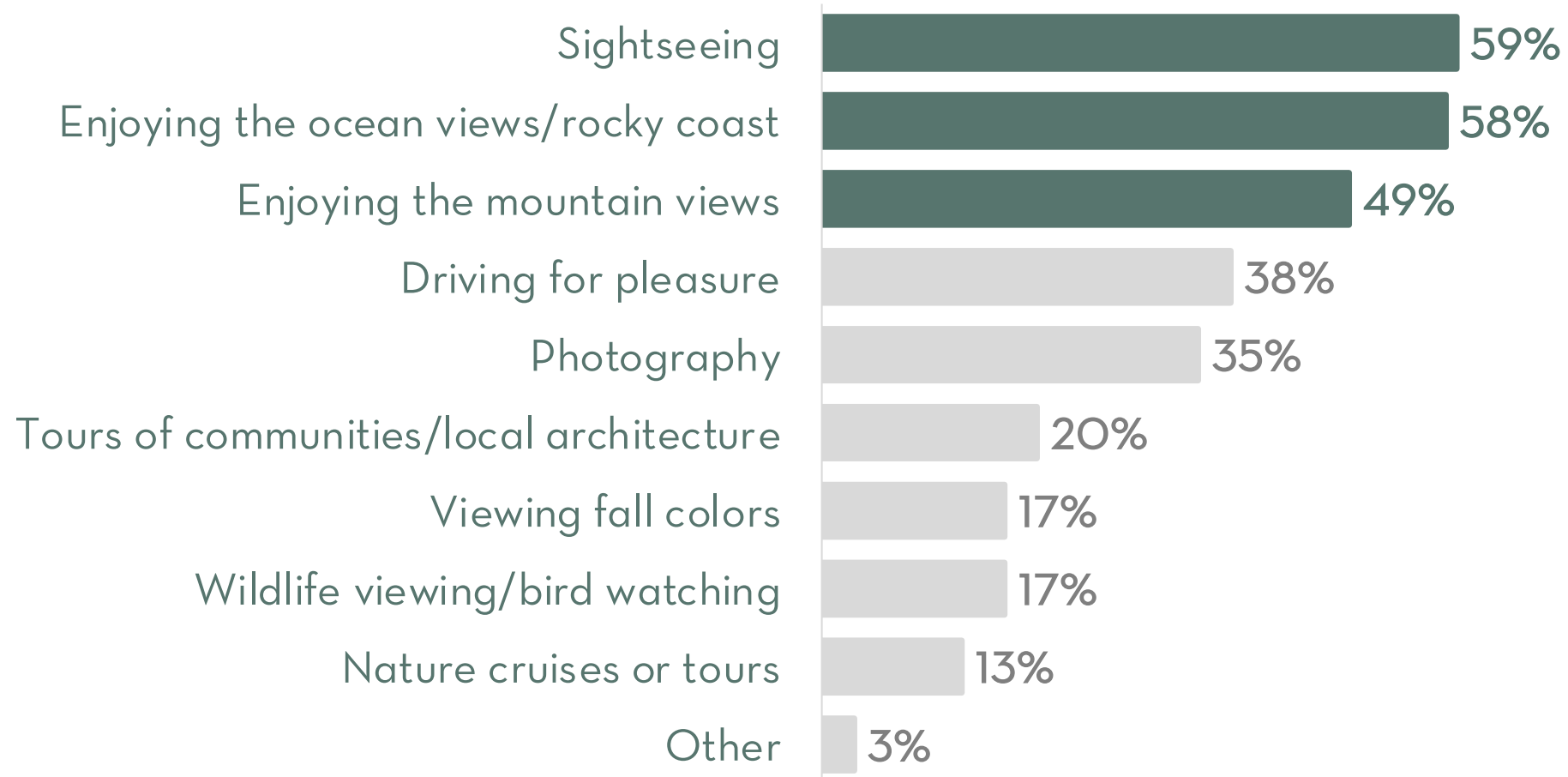
- » Nearly 3 in 4 of visitors participated in food, beverage, and culinary activities during their trip in Downeast & Acadia
- » 7 in 10 visitors to Downeast & Acadia engaged in sightseeing/touring activities during their trip



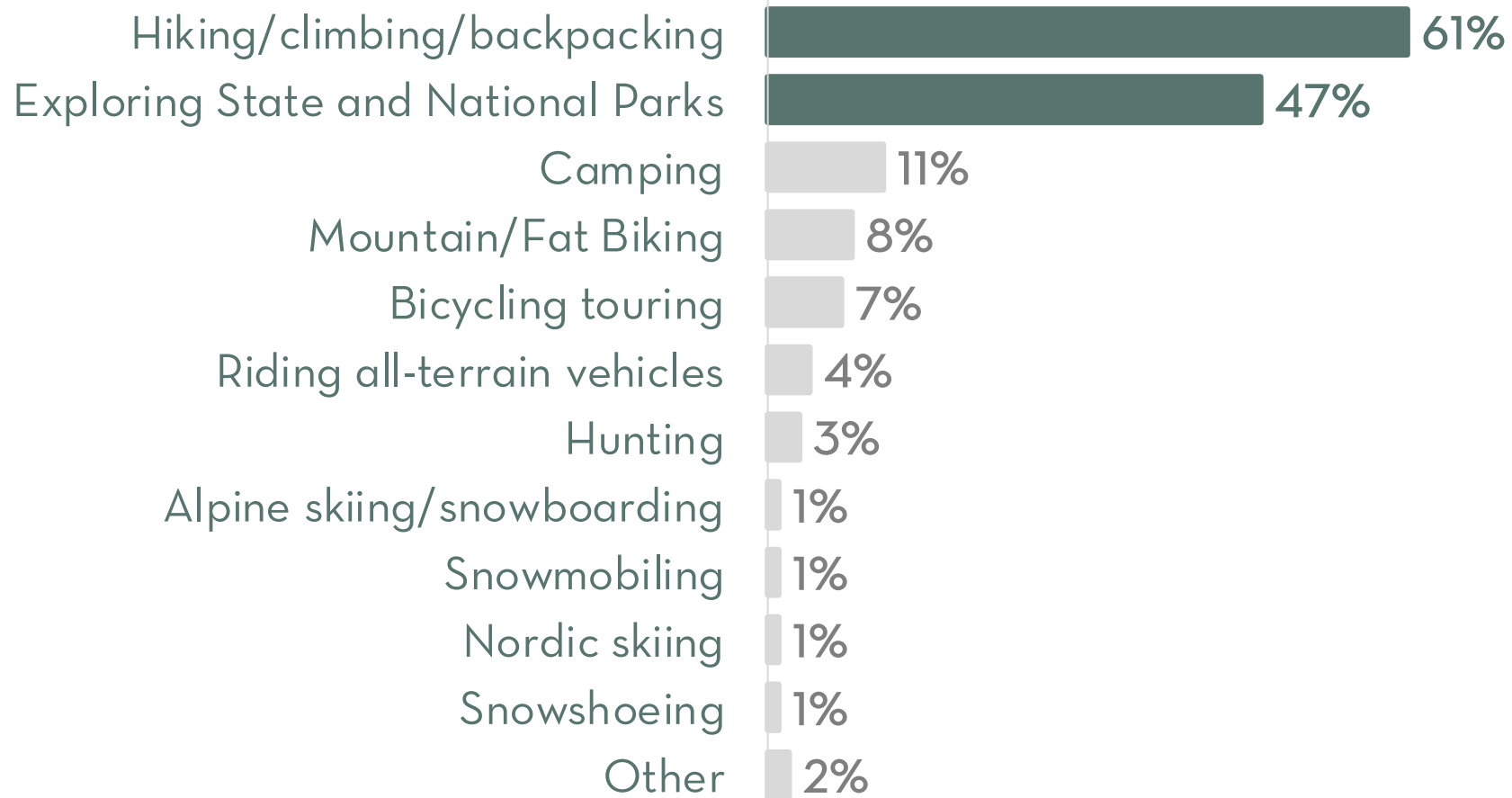
FOOD & BEVERAGE ACTIVITIES*



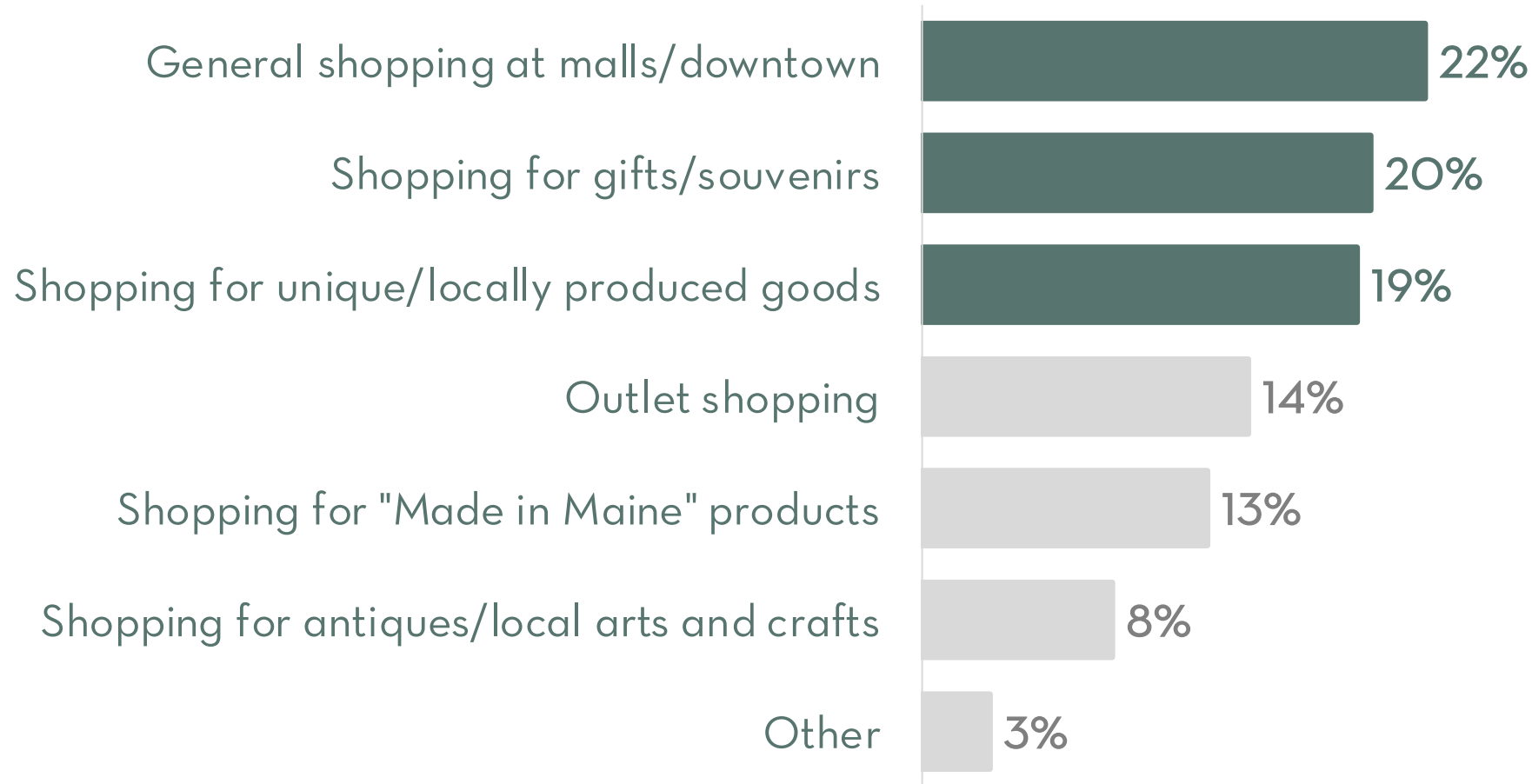
TOURING & SIGHTSEEING ACTIVITIES*



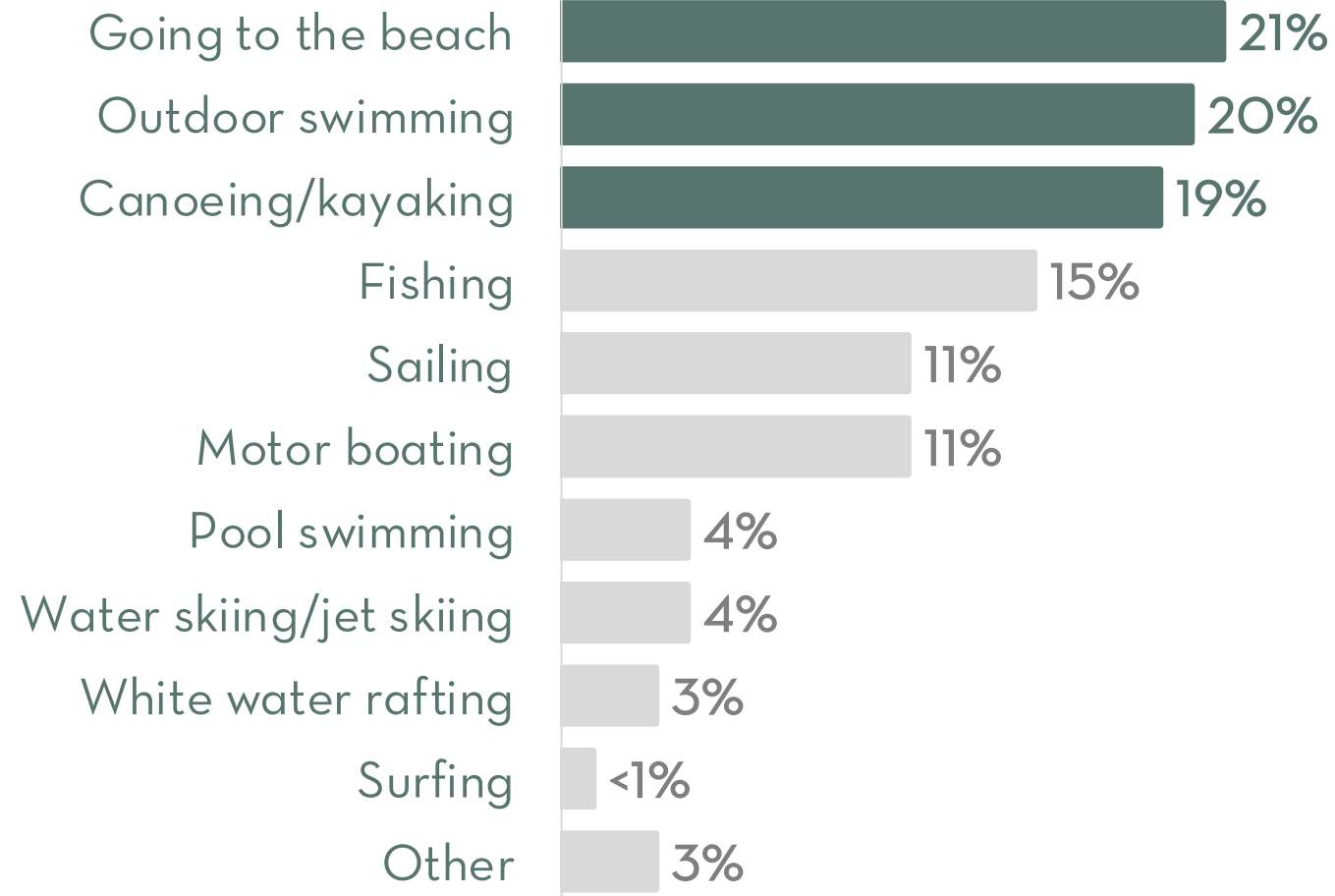
ACTIVE OUTDOOR ACTIVITIES*



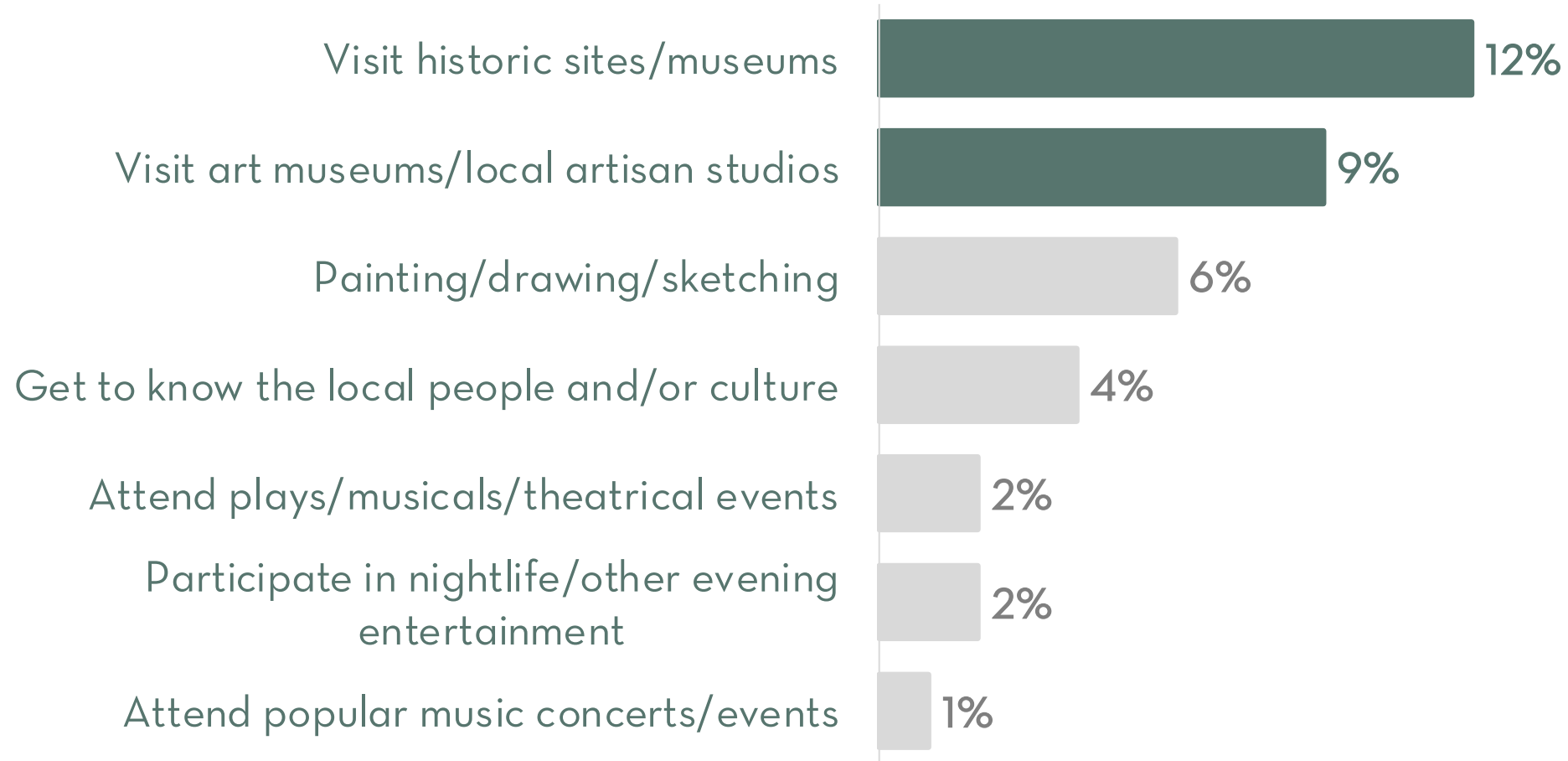
SHOPPING ACTIVITIES*



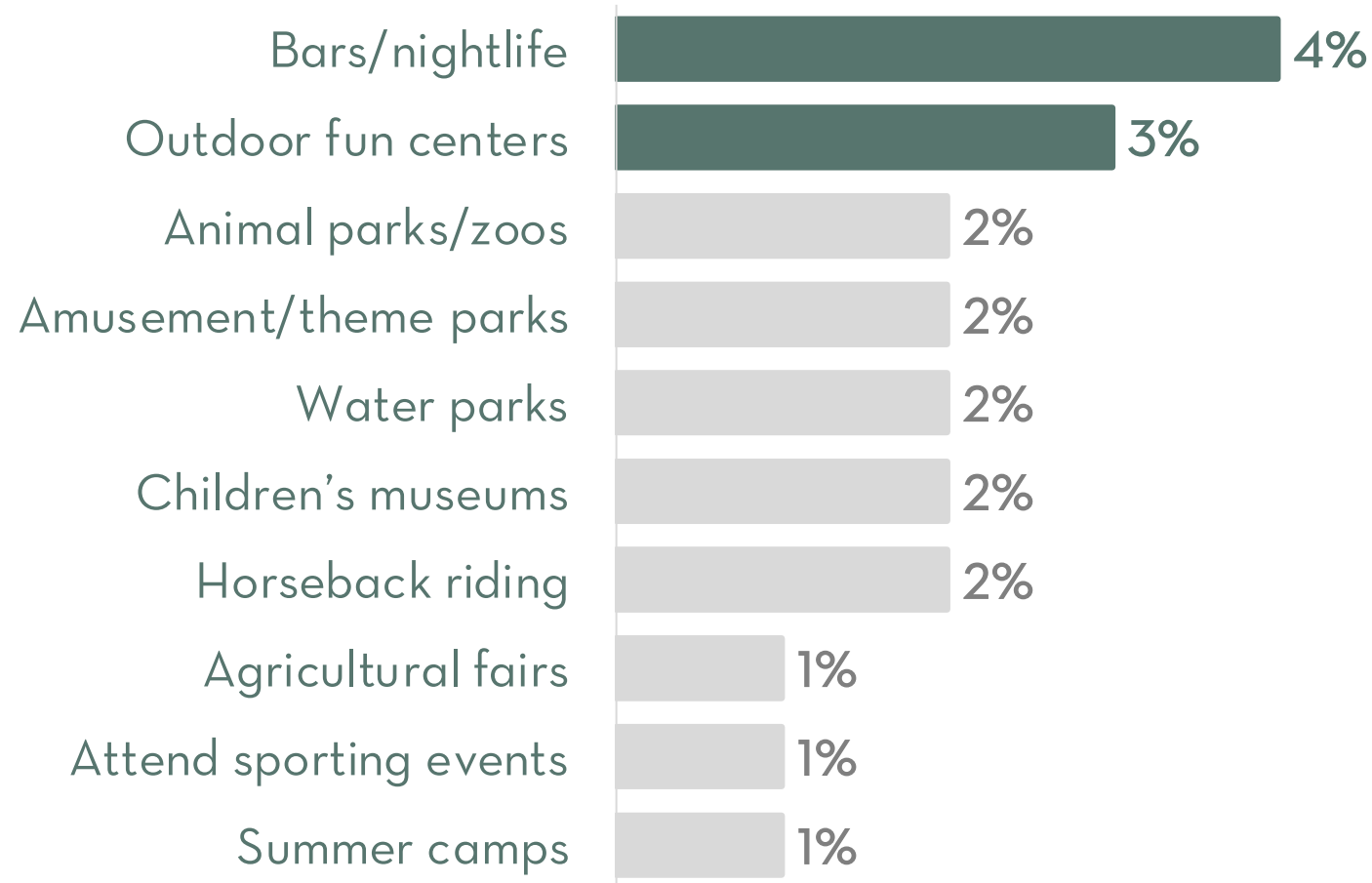
WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*

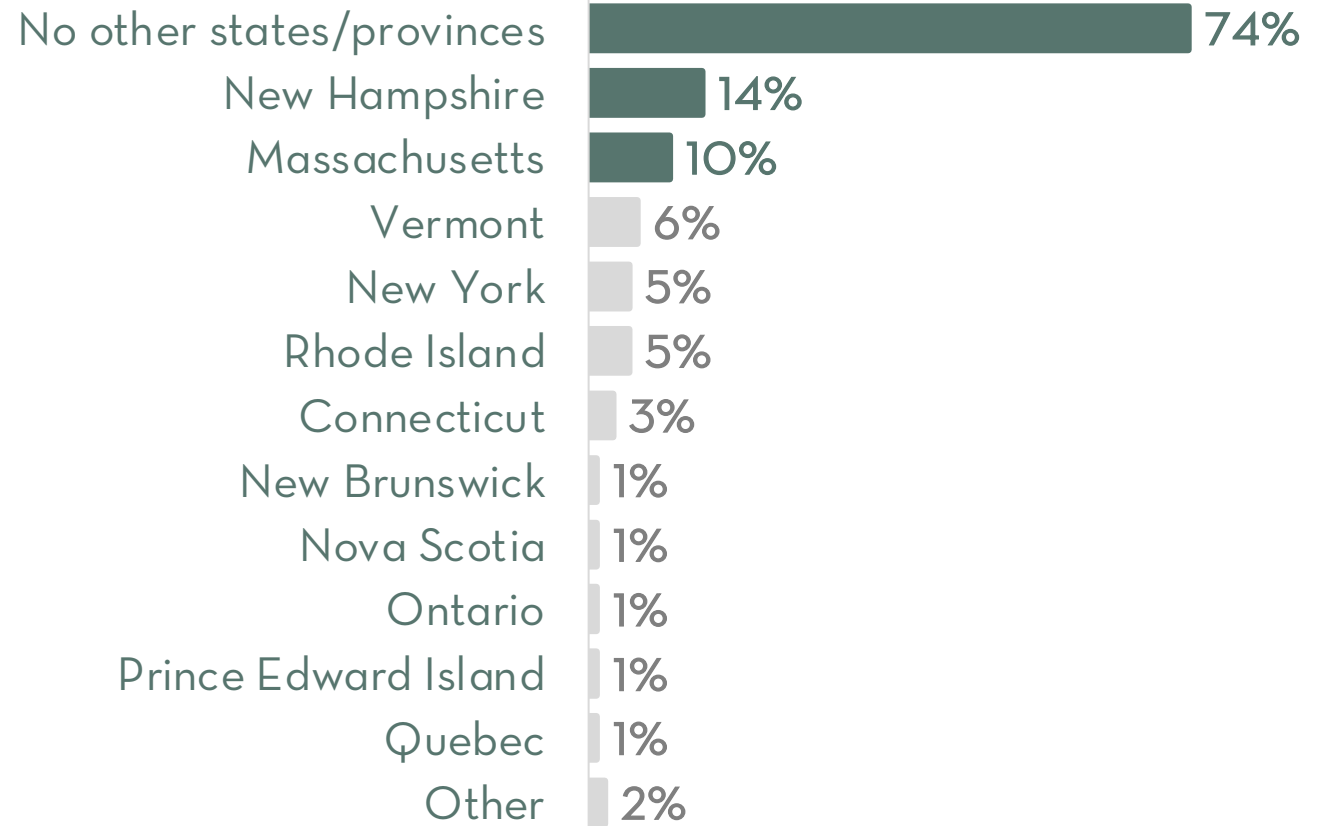


ENTERTAINMENT ACTIVITIES*



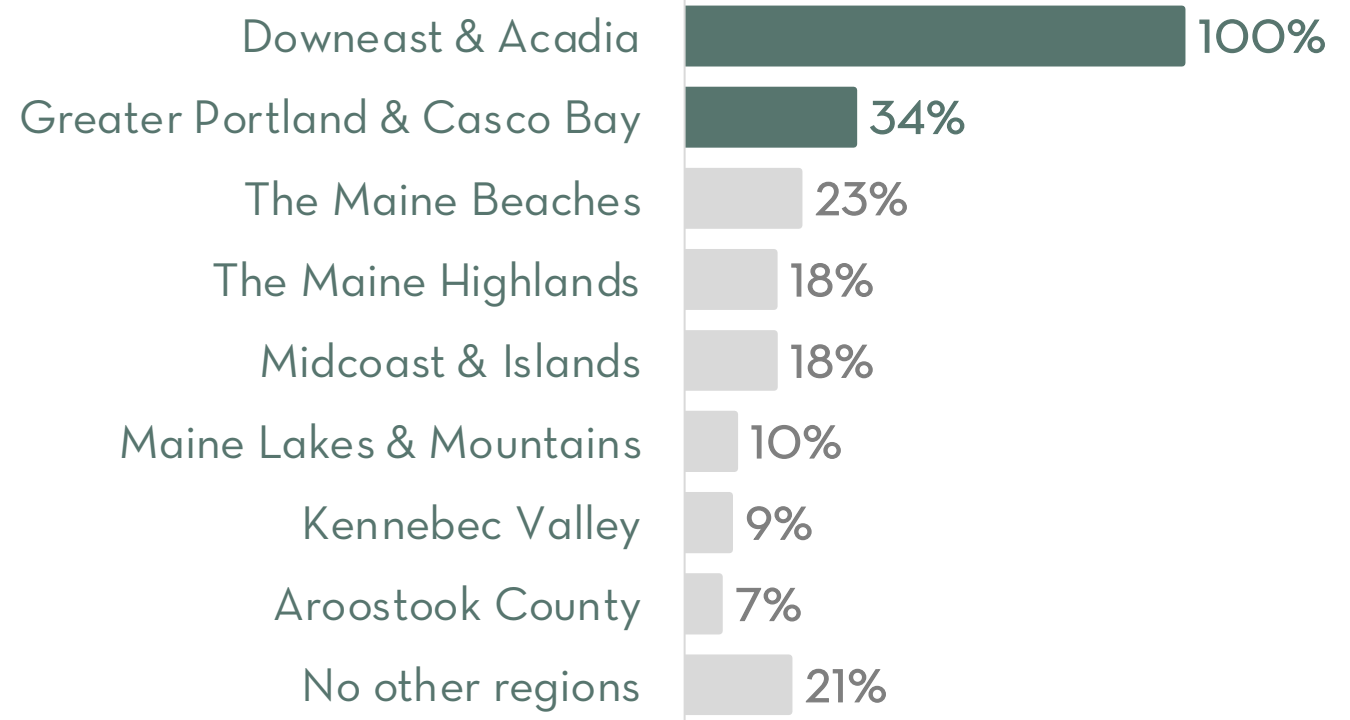
OTHER STATES & PROVINCES VISITED*

- » 3 in 4 visitors did not visit any other U.S. state or Canadian province on their trip to Downeast & Acadia
- » Visitors were **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip, due to Canadian COVID-19 travel restrictions



REGIONS VISITED WITHIN MAINE*

- » **1 in 5** visitors stayed within the Downeast & Acadia region during their trip in Maine, rather than traveling throughout the state
- » **1 in 3** visitors to the Downeast & Acadia region also visited Greater Portland & Casco Bay during their trip in Maine



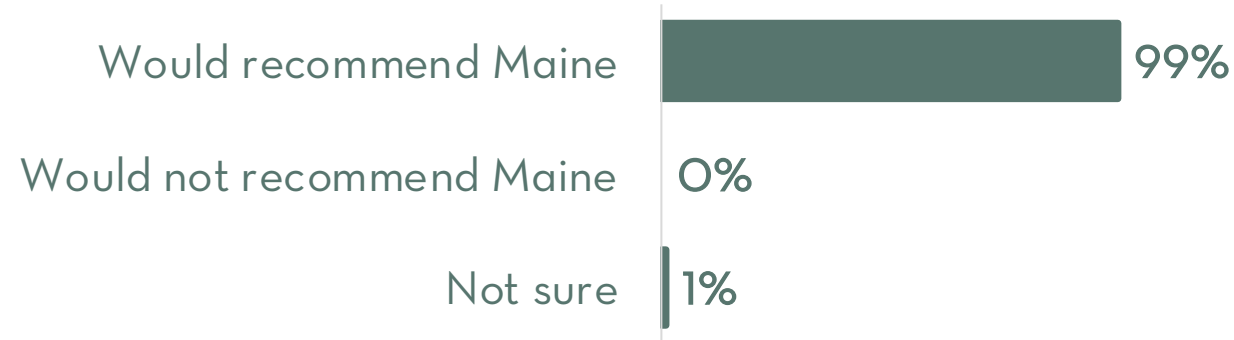
TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » **99%** of visitors would recommend that their friends and family visit Maine

Likelihood of Recommending Maine

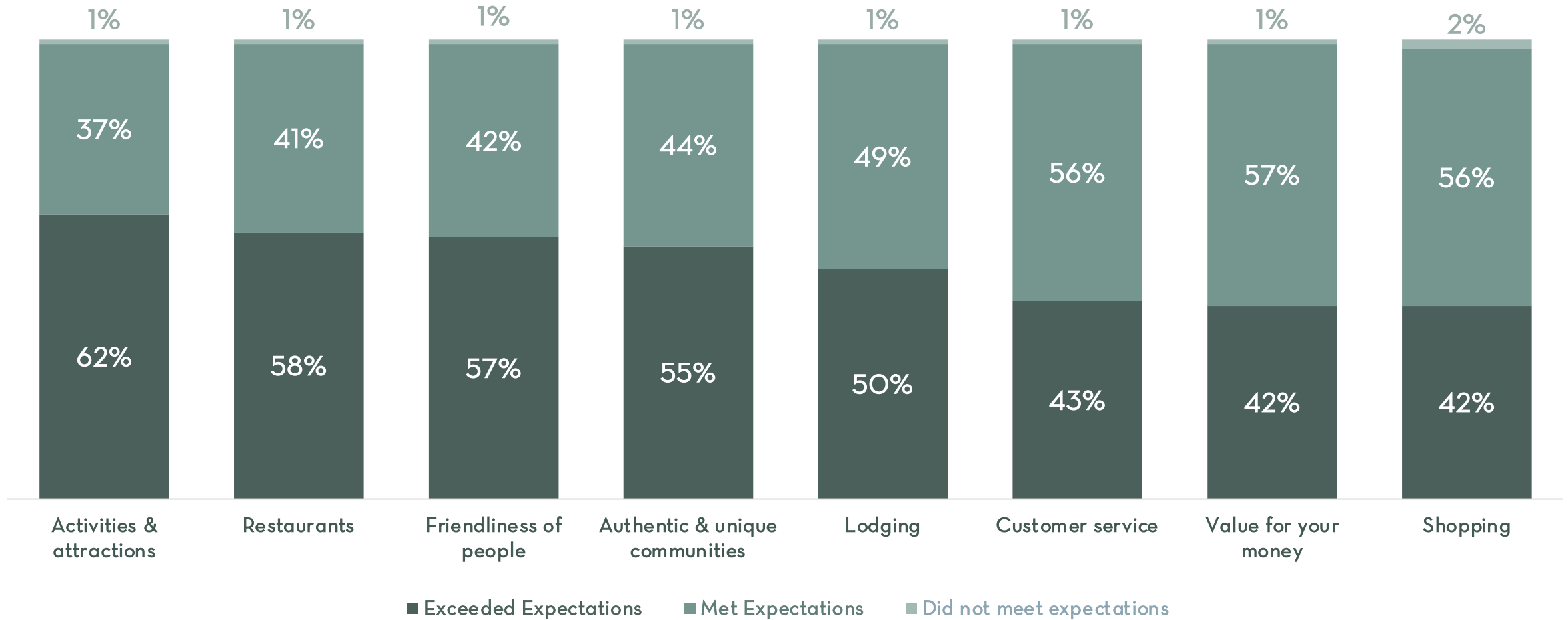


- » **98%** of visitors would recommend that their friends and family visit the Downeast & Acadia region

Likelihood of Recommending Downeast & Acadia



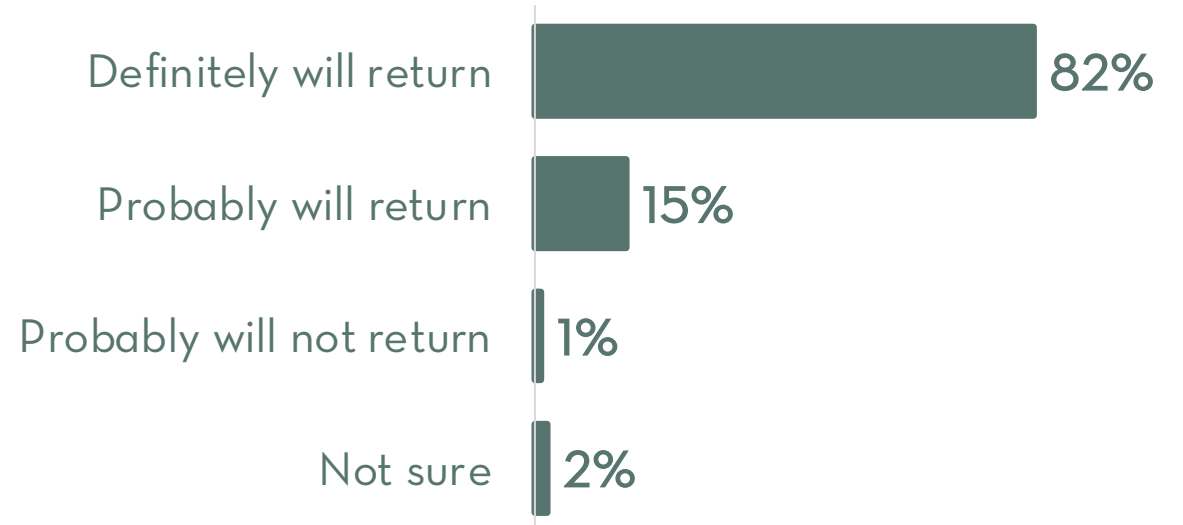
TRIP EXPECTATIONS



"Don't know" responses omitted.

LIKELIHOOD OF RETURNING TO MAINE

- » 97% of visitors to Downeast & Acadia will return to Maine for a future visit or vacation



DOWNEAST & ACADIA

2020 Visitor Tracking & Economic Impact Report January – December 2020

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