

# GREATER PORTLAND & CASCO BAY

2020 Economic Impact & Visitor Tracking Report  
January - December 2020

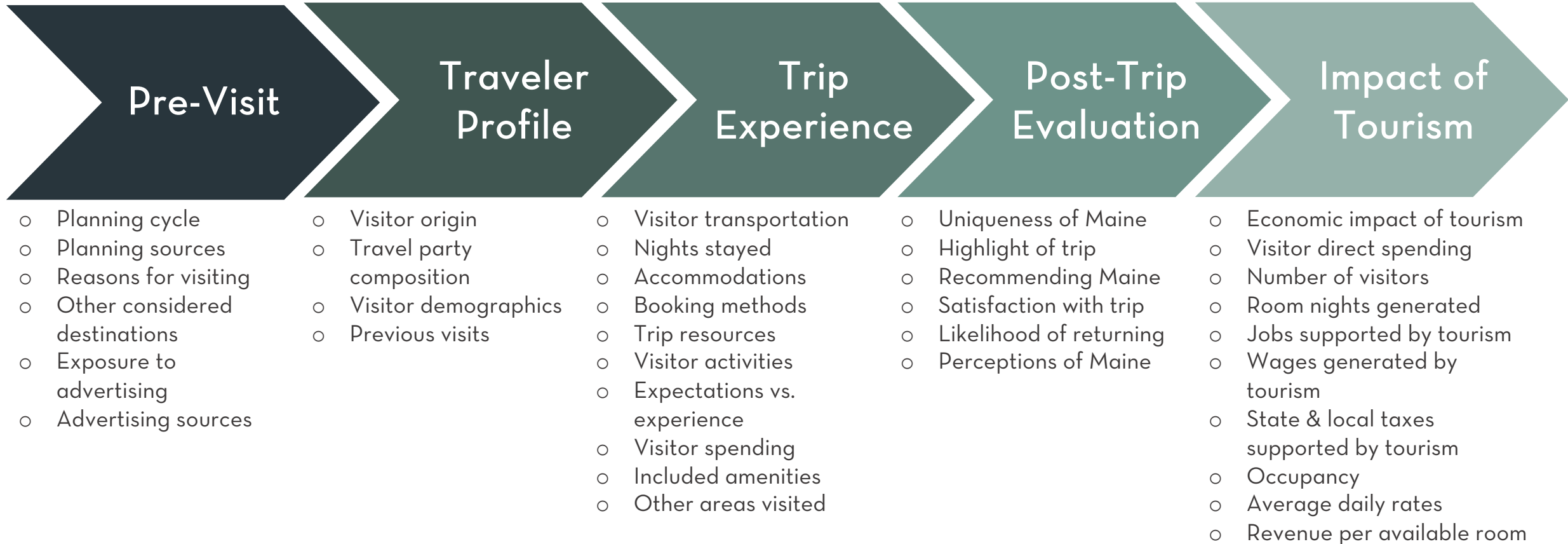


# INTRODUCTION



# 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 **Greater Portland & Casco Bay** region.





# METHODOLOGY



## *Visitor Tracking*

1,118 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 January 1<sup>st</sup> and December 31<sup>st</sup>, 2020.\*

## *Economic Impact*

Total economic impact of tourism on Greater Portland & Casco Bay 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.

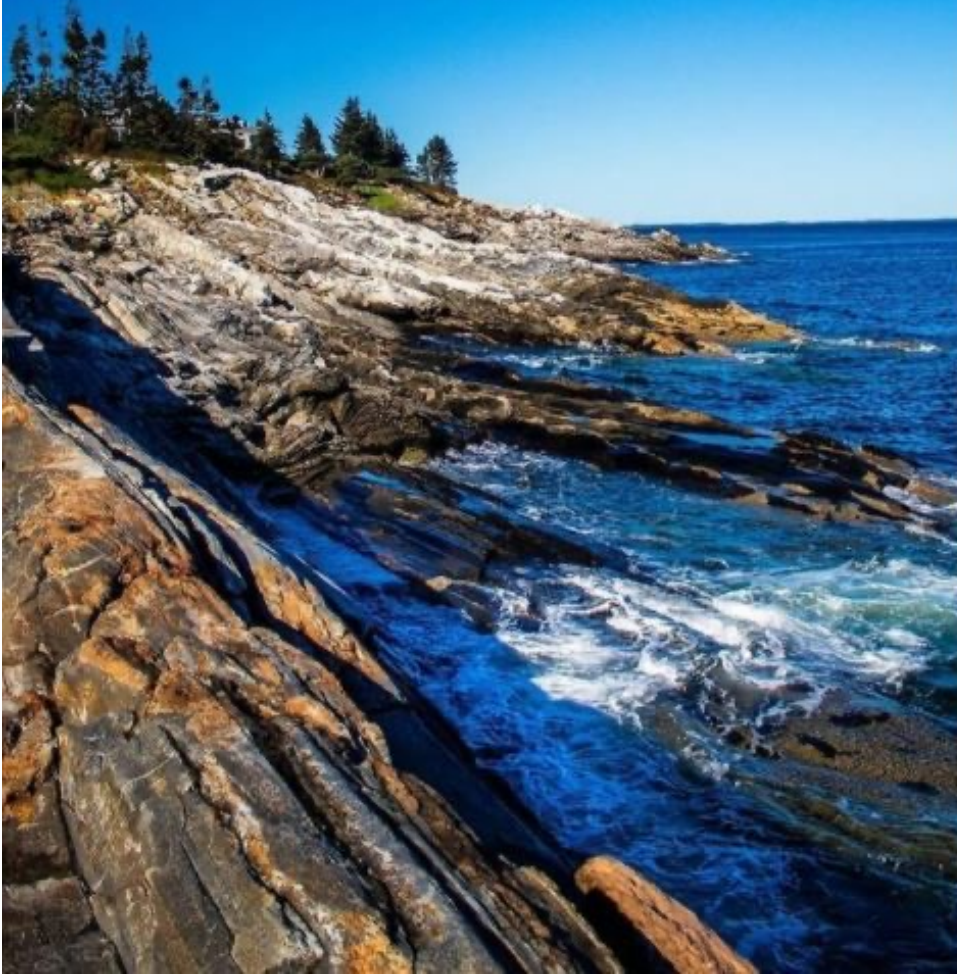
# PRESENTATION VERSION



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.



# GREATER PORTLAND AND CASCO BAY



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

- » Travel by air
- » Be “Connected” travelers (use more online resources while in Maine)
- » Participate in history/cultural activities while on their trip
- » Use social media to plan their trip
- » Use friends and family to plan their trip
- » Visit for sightseeing/touring
- » Notice advertising/promotion on the internet

# TRIP PLANNING CYCLE : IMPACT OF TOURISM





# ECONOMIC IMPACT

Visitor spending in 2020 generated

**\$1,195,365,100**

in economic impact to the Greater  
Portland & Casco Bay region



# DIRECT SPENDING

Visitors who took a trip to the Greater  
Portland and Casco Bay region in 2020  
spent

**\$642,669,400**

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



# VISITORS

The Greater Portland & Casco  
Bay region attracted

1,820,400

visitors in 2020





# ROOM NIGHTS

Visitors to the Greater Portland &  
Casco Bay region generated

1,056,500

room nights in paid  
accommodations in 2020



# JOBS SUPPORTED

The total economic impact of  
tourism in the Greater Portland &  
Casco Bay region supported

# 11,600

jobs in 2020





# WAGES GENERATED

Tourism in the Greater Portland & Casco  
Bay region supported

**\$448,718,400**

in wages and salaries in 2020





# VISITORS CREATE JOBS

A Greater Portland & Casco Bay region  
job is supported by every

157

visitors



# HOUSEHOLD SAVINGS

Visitors to the Greater Portland &  
Casco Bay region saved local  
residents

**\$1,366**

in taxes per household in 2020



# LODGING METRICS

| <i>Lodging Metrics</i>              | <i>2020</i>          |
|-------------------------------------|----------------------|
| <i>Occupancy (%)</i>                | <i>39.0%</i>         |
| <i>Average Daily Rate</i>           | <i>\$127.75</i>      |
| <i>Revenue per Available Room</i>   | <i>\$49.82</i>       |
| <i>Total Accommodations Revenue</i> | <i>\$134,965,000</i> |



# TRIP PLANNING CYCLE : PRE-VISIT



# TRIP PLANNING CYCLE

- » Over 2 in 5 visitors started planning their trip to Greater Portland less than a month in advance
- » Nearly 3 in 5 visitors booked their trip/decided to visit Greater Portland less than a month in advance



# TOP ONLINE TRIP PLANNING SOURCES\*



34% Online search engines



21% Facebook



17% Online travel agency



16% Hotel Websites

\*Multiple responses permitted.



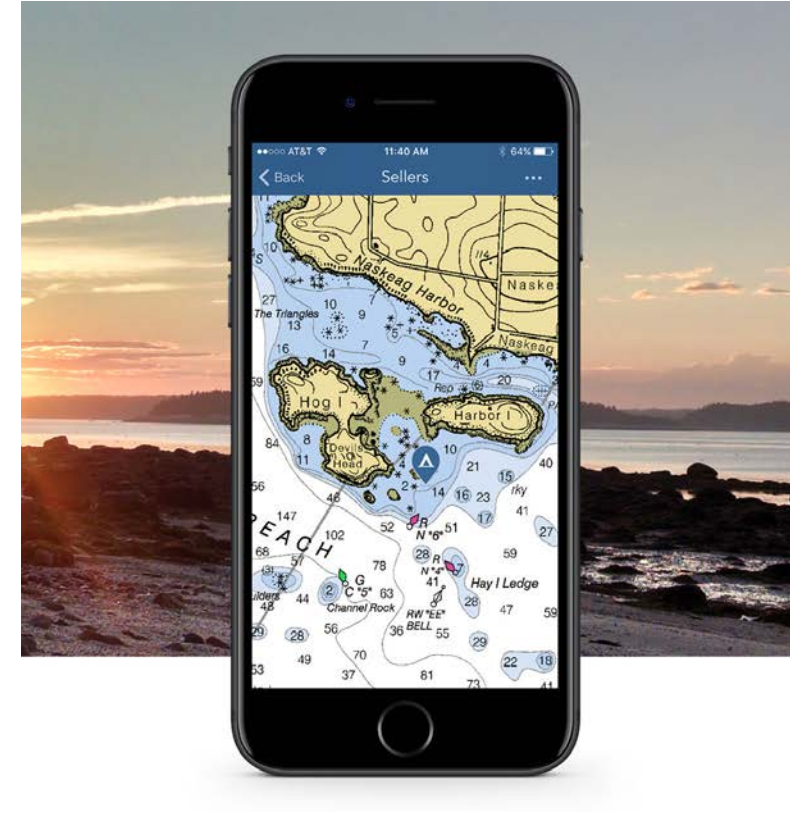
# TOP OTHER TRIP PLANNING SOURCES\*



44% Advice from friends/family



12% Travel guides/brochures



11% Travel planning apps

\*Multiple responses permitted.



# TOP REASONS FOR VISITING\*



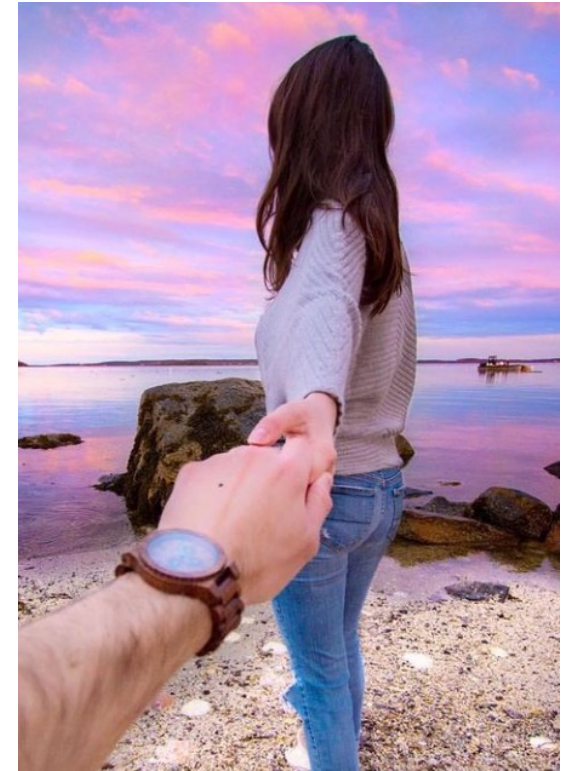
42% Vacation



32% Visiting  
friends/relatives



25% Relax and unwind



22% Sightseeing/touring

\*Up to three responses permitted.

# CONSIDERING MAINE AS A DESTINATION

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





# PRE-TRIP EXPOSURE TO ADVERTISING

- » Over 2 in 5 visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to Greater Portland



# TOP SOURCES OF ADVERTISING EXPOSURE\*



43% Internet



40% Social media



28% Cable or satellite  
television

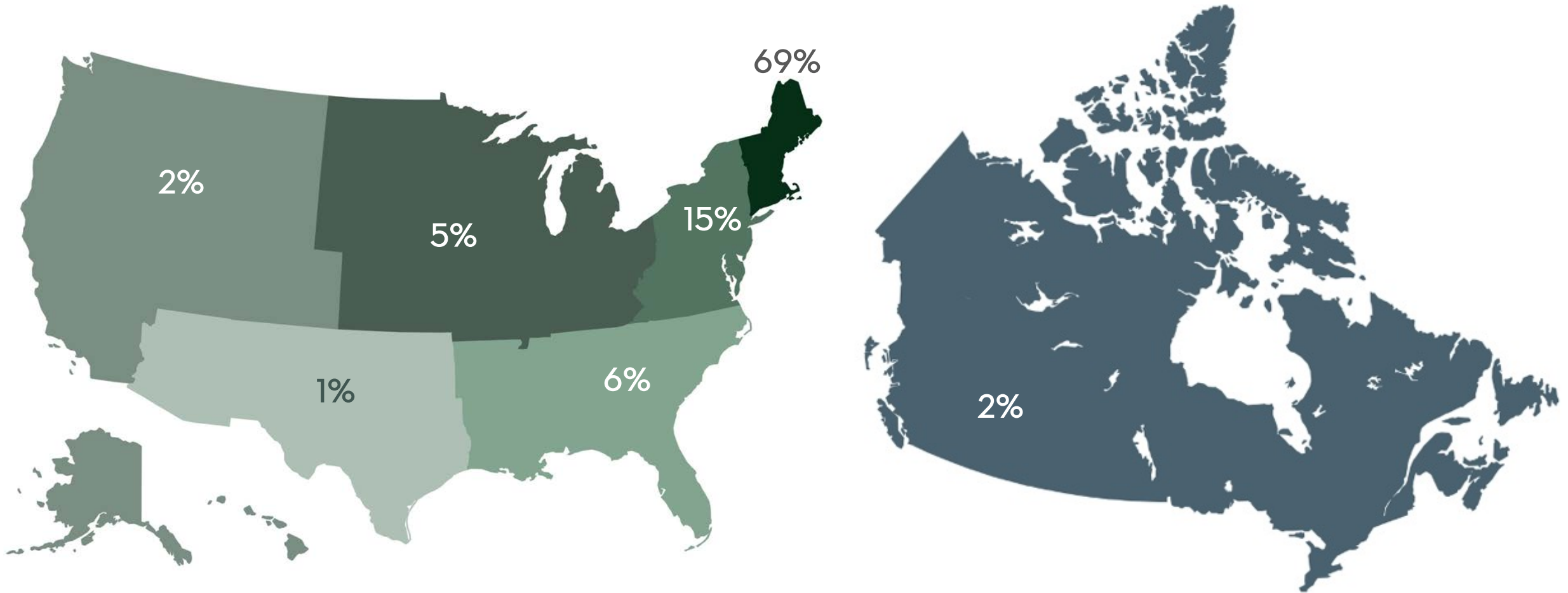
\*Multiple responses permitted.

# TRIP PLANNING CYCLE : TRAVELER PROFILE





# REGIONS OF ORIGIN



# TOP ORIGIN STATES & PROVINCES



# 67%

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



Maine (25%)



Massachusetts (18%)



New Hampshire (9%)



New York (7%)



Connecticut (4%)



Florida (4%)

# TOP ORIGIN MARKETS



10% Boston, MA



8% New York City, NY



4% Washington DC - Baltimore,  
MD



# TRAVEL PARTIES

The typical visitor to Greater Portland traveled with **2.5** 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



54% Female\*



67% College/technical graduate



68% Married/domestic partnership



71% Employed



85% White/Caucasian



\$82,900 annual household income

\*Of visitors interviewed



# VISITOR PROFILE: DAY TRIPPERS

- » The typical day tripper<sup>1</sup>:
  - » Earned \$61,200 per year
  - » Was female (67%)
  - » Had at least a college/technical degree (63%)
  - » Was married or living with their partner (57%)
  - » Was employed full-time (43%)
  - » Was White/Caucasian (88%)
  - » 11% traveled with children
  - » Was from Maine (56%) and other northeastern U.S. states (39%)

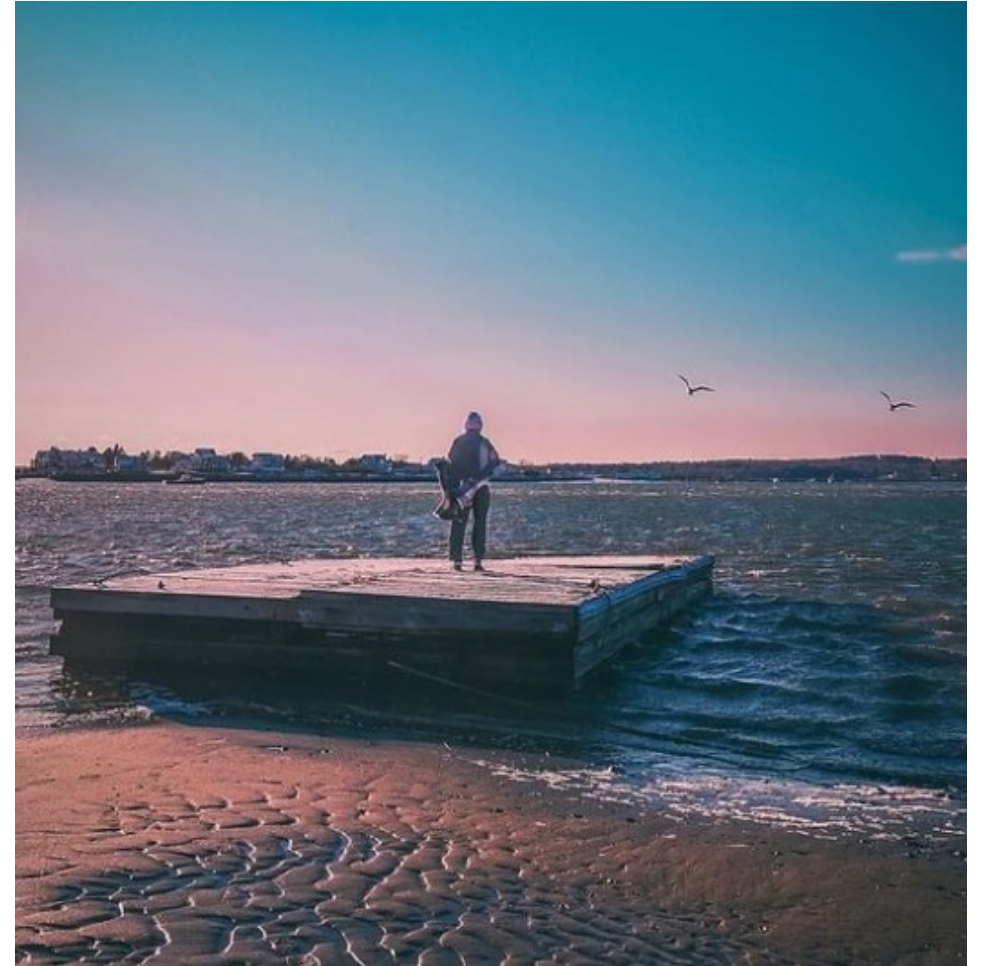


<sup>1</sup> Did not stay overnight in Greater Portland during their trip.



# VISITOR PROFILE: OVERNIGHT VISITORS

- » The typical overnight visitor<sup>1</sup>:
  - » Earned \$86,300 per year
  - » Was female (52%)
  - » Had at least a college/technical degree (68%)
  - » Was married or living with their partner (70%)
  - » Was employed full-time (52%)
  - » Was White/Caucasian (85%)
  - » 20% traveled with children
  - » Was from Maine (22%) and other northeastern U.S. states (51%)



<sup>1</sup>Stayed one or more nights in Greater Portland during their trip.

# NEW & RETURNING VISITORS

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



# TRIP PLANNING CYCLE : TRIP EXPERIENCE





# TRANSPORTATION

- » 82% of visitors drove to Greater Portland
- » 10% of visitors to Greater Portland flew to Maine through Portland International Airport



# NIGHTS STAYED

- » 67% of visitors to Greater Portland spent one or more nights in Maine
- » Typical visitors to Greater Portland stayed 4.1 nights in Maine on their trip





# TOP ACCOMMODATIONS



33% Did not stay overnight



23% Hotel/motel/resort



20% Friends/family home



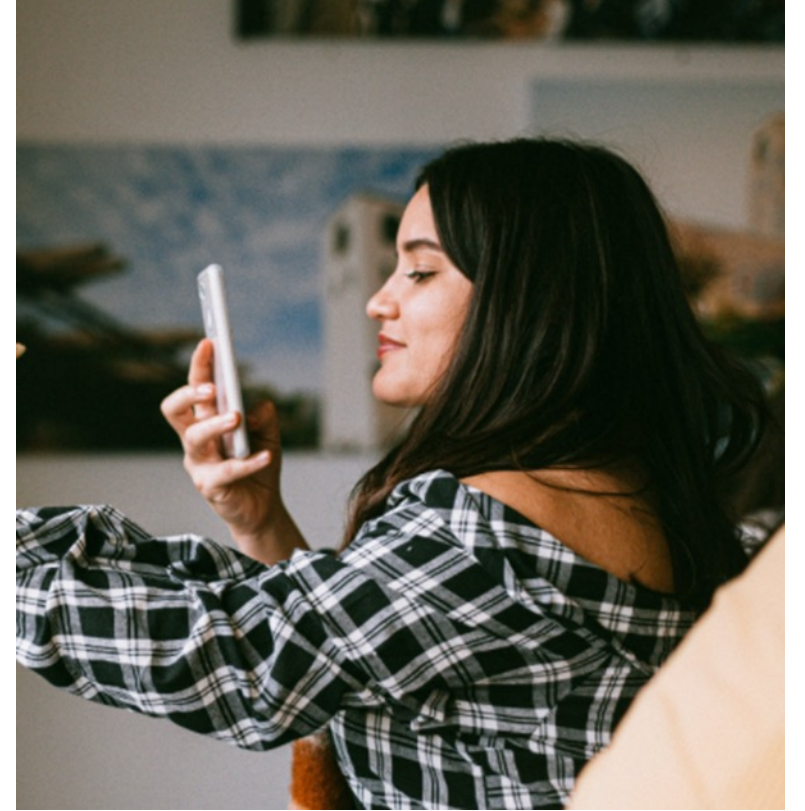
# TOP IN-MARKET VISITOR RESOURCES\*



61% Navigation websites/apps



32% Restaurant website/apps



23% Personal social media

\*Multiple responses permitted.



# TOP VISITOR ACTIVITIES\*



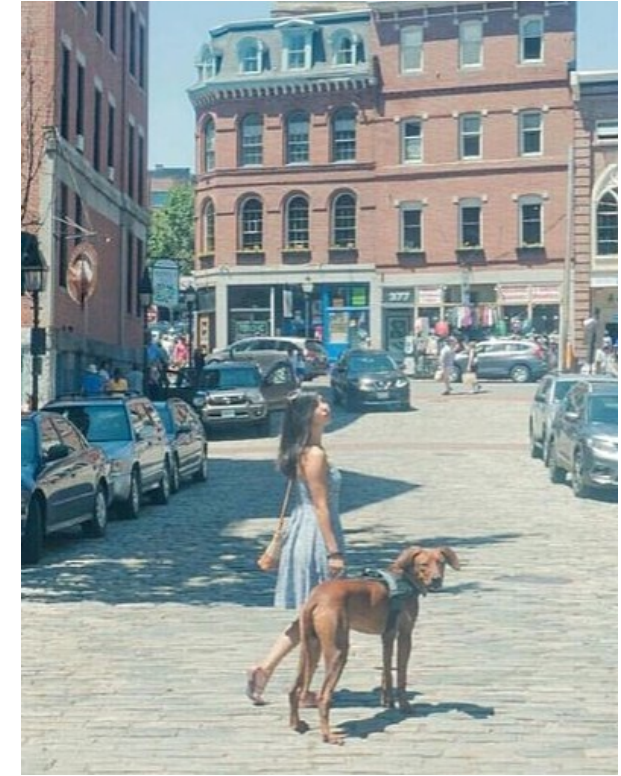
74% Food/beverage/  
culinary



62% Touring/sightseeing



50% Active outdoor  
activities



44% Shopping

\*Multiple responses permitted.



# VISITING OTHER STATES & PROVINCES

- » 3 in 4 visitors did not visit any other U.S. state or Canadian province on their trip to Greater Portland
- » Visitors to Greater Portland 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 4 in 5 visitors traveled to regions other than Greater Portland during their trips to Maine



# TRIP PLANNING CYCLE : POST-TRIP EVALUATION



# RECOMMENDING MAINE & ITS REGIONS

- » 98% of visitors to Greater Portland would recommend Maine to a friend or relative as a vacation destination
- » 98% of visitors would recommend that their friends and family visit the Greater Portland & Casco Bay area





# LIKLIHOOD OF RETURNING TO MAINE

» 95% of visitors to Greater Portland 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>1,820,400</i>       |
| <i>Room nights generated</i> | <i>1,056,500</i>       |
| <i>Direct expenditures</i>   | <i>\$642,669,400</i>   |
| <i>Total economic impact</i> | <i>\$1,195,365,100</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>11,600</i> |

| <i>Maine Wages</i>                            | <i>2020</i>          |
|---|----------------------|
| <i>Wages paid (direct)</i>                    | <i>\$267,269,000</i> |
| <i>Total impact of tourism on Maine wages</i> | <i>\$448,718,400</i> |



# IMPACT OF TOURISM

| <i>Return on Investment</i>              | <i>2020</i>          |
|--|----------------------|
| <i>Visitors per job supported</i>        | <i>157</i>           |
| <i>State &amp; local taxes supported</i> | <i>\$102,422,300</i> |
| <i>Tax savings per household</i>         | <i>\$1,366</i>       |

# LODGING METRICS

| <i>Lodging Metrics</i>              | <i>2020</i>          |
|-------------------------------------|----------------------|
| <i>Occupancy (%)</i>                | <i>39.0%</i>         |
| <i>Average Daily Rate</i>           | <i>\$127.75</i>      |
| <i>Revenue per Available Room</i>   | <i>\$49.82</i>       |
| <i>Total Accommodations Revenue</i> | <i>\$134,965,000</i> |

# TRIP PLANNING CYCLE : PRE-VISIT

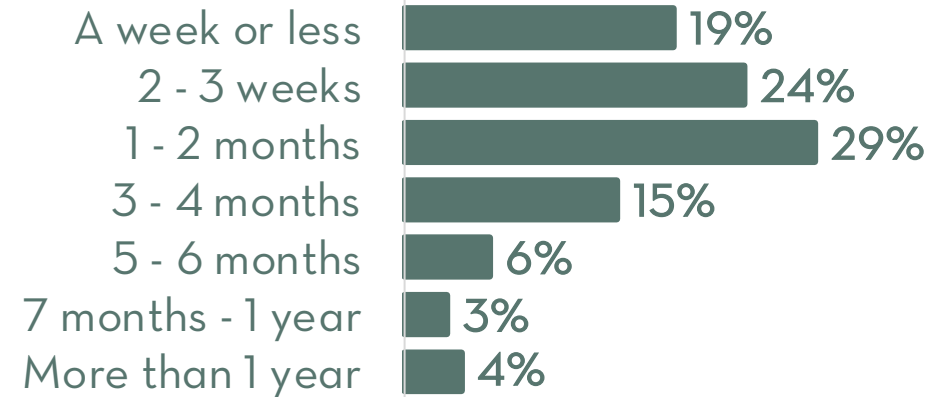




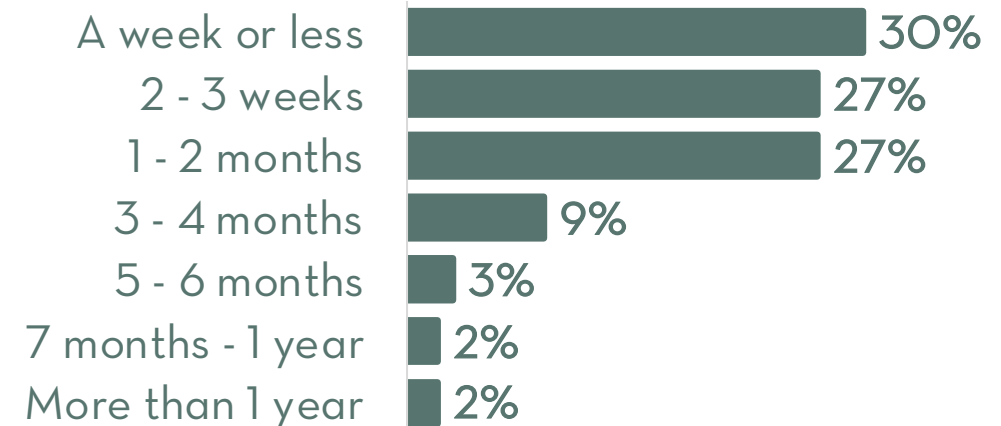
# TRIP PLANNING CYCLE

- » Over 2 in 5 visitors to Greater Portland started planning their trip within a month of their trip
- » Very few visitors (13%) have planning windows longer than 4 months
- » Nearly 3 in 5 visitors have a booking window of less than 1 month
- » Very few visitors (7%) booked accommodations 5+ months in advance

## *Beginning of Trip Planning Cycle*

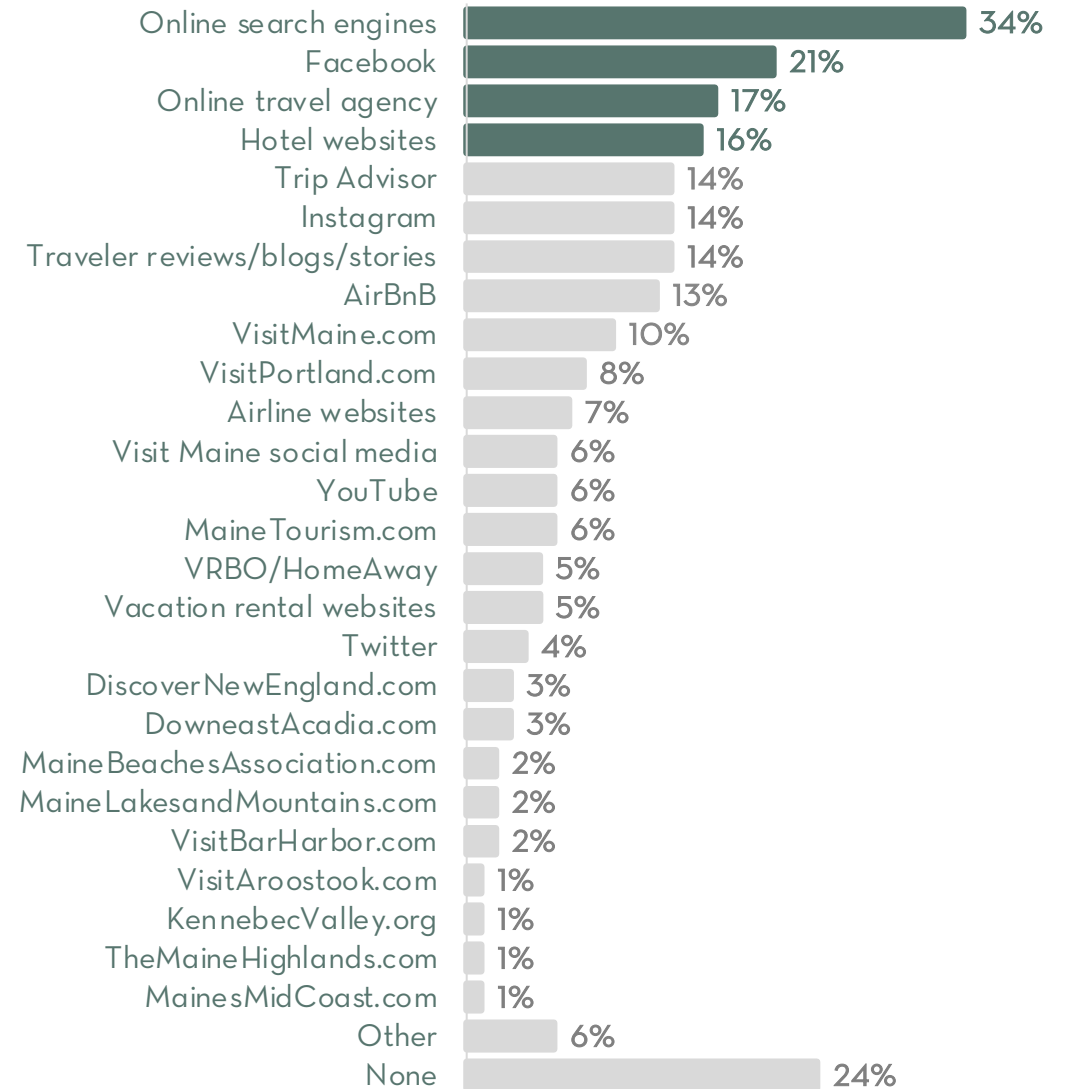


## *Booked Accommodations/Made Trip Decisions*



# ONLINE TRIP PLANNING SOURCES\*

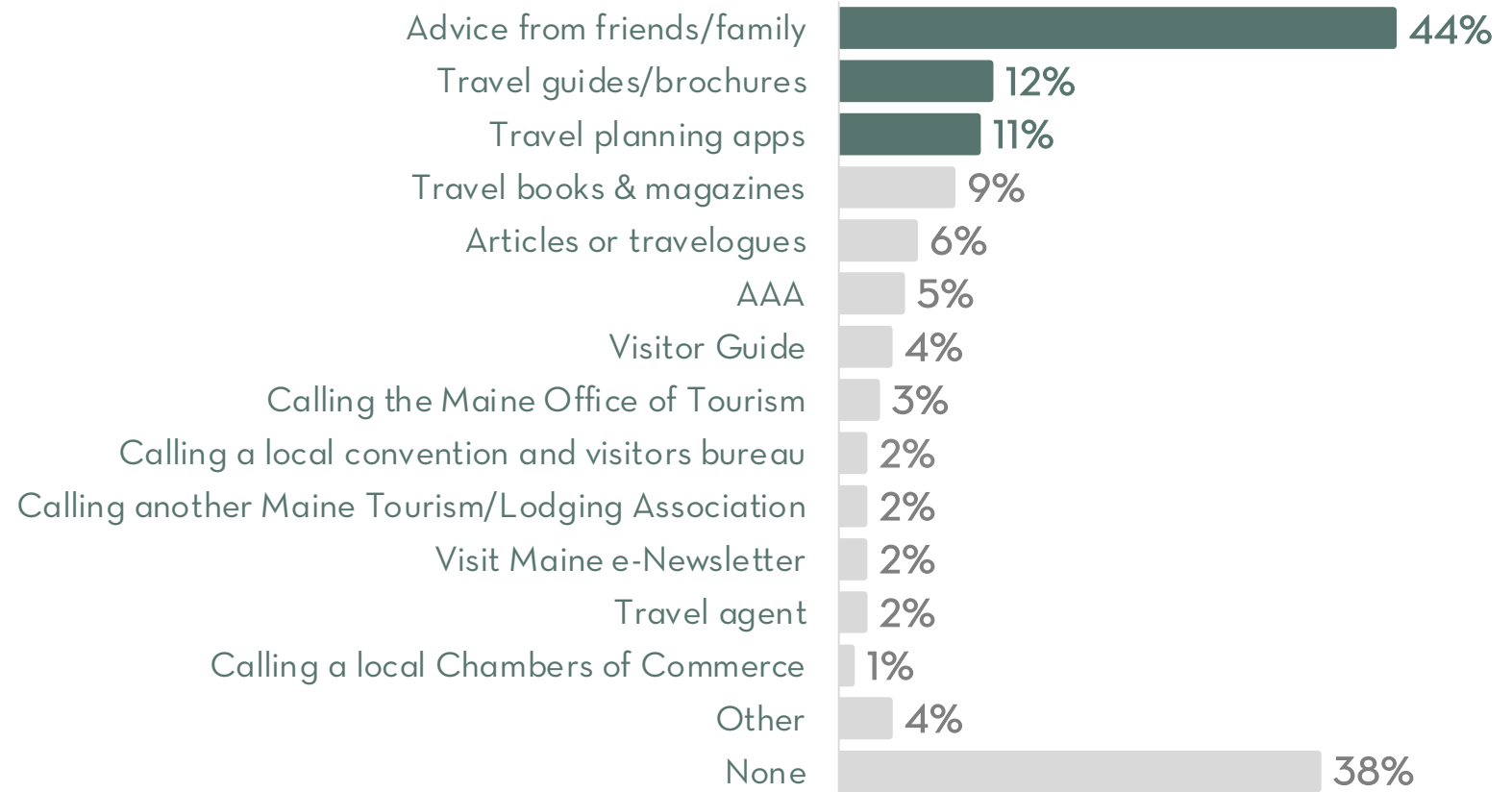
- » Over 3 in 4 visitors used one or more online resources to help them plan their trip to Greater Portland
- » 1 in 3 visitors used an online search engine, such as Google, to help them plan their trip to Greater Portland
- » 10% of visitors used VisitMaine.com, and 8% used VisitPortland.com



\*Multiple responses permitted.

# OTHER TRIP PLANNING SOURCES\*

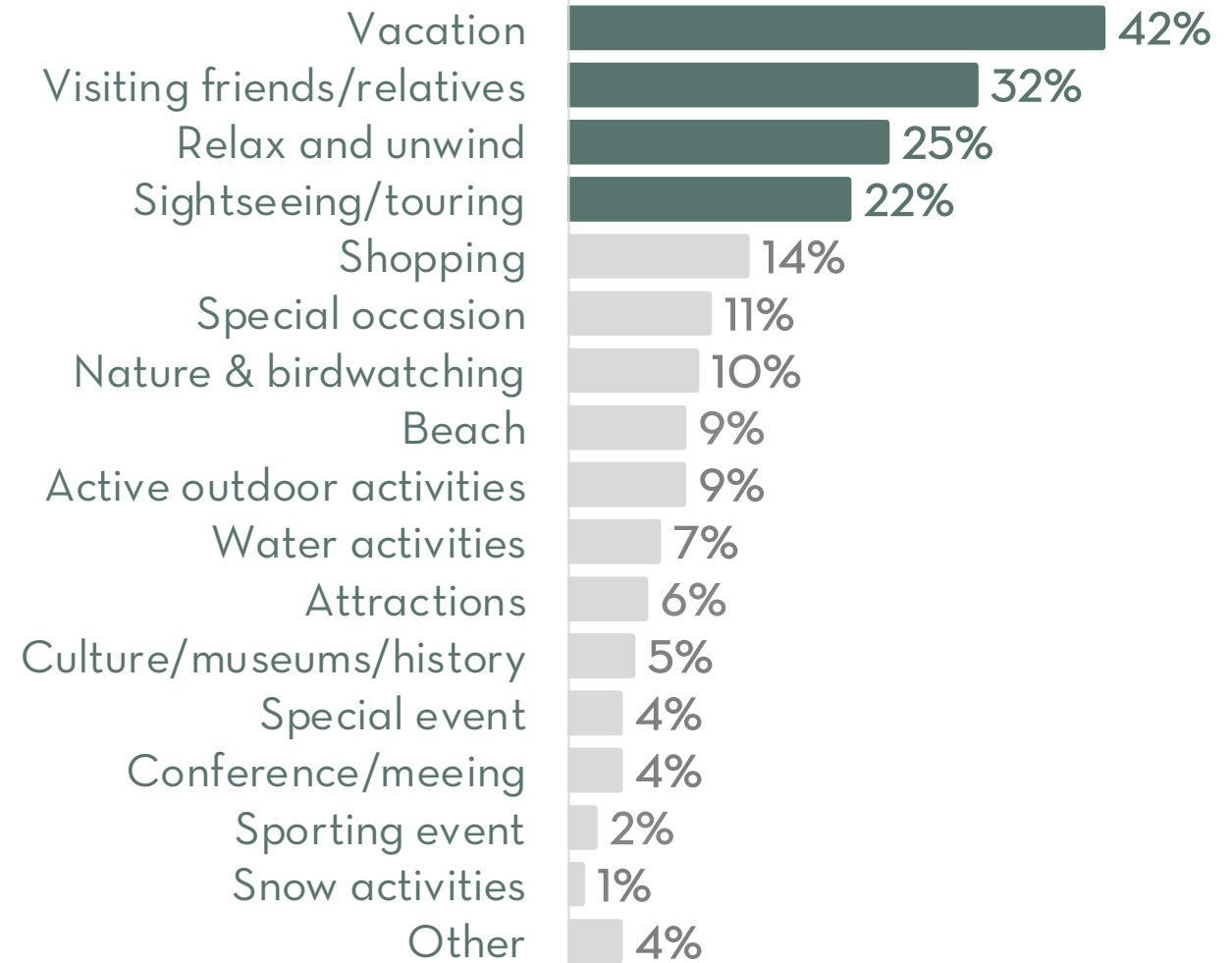
- » **44%** of visitors relied on advice from their friends and family to help them plan their trip to Greater Portland
- » **Nearly 2 in 5** visitors did not use any other resources to help them plan their trip to Greater Portland





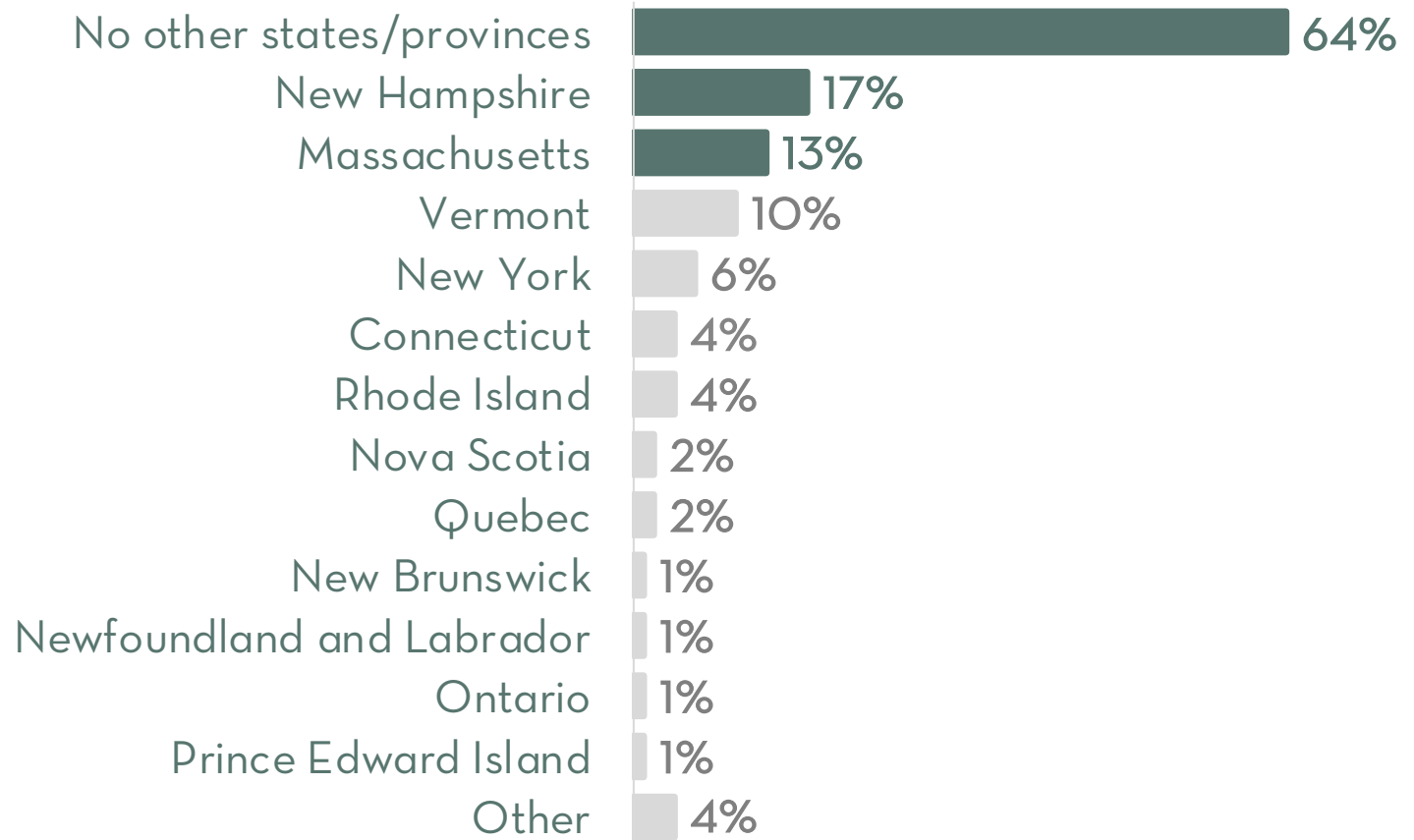
# REASONS FOR VISITING\*

- » **Over 2 in 5** visitors primarily traveled to Greater Portland for a vacation
- » **Nearly 1 in 3** visitors visited Maine to visit friends and relatives
- » **25%** of visitors came to Greater Portland to relax and unwind, and **22%** came to sightsee and tour



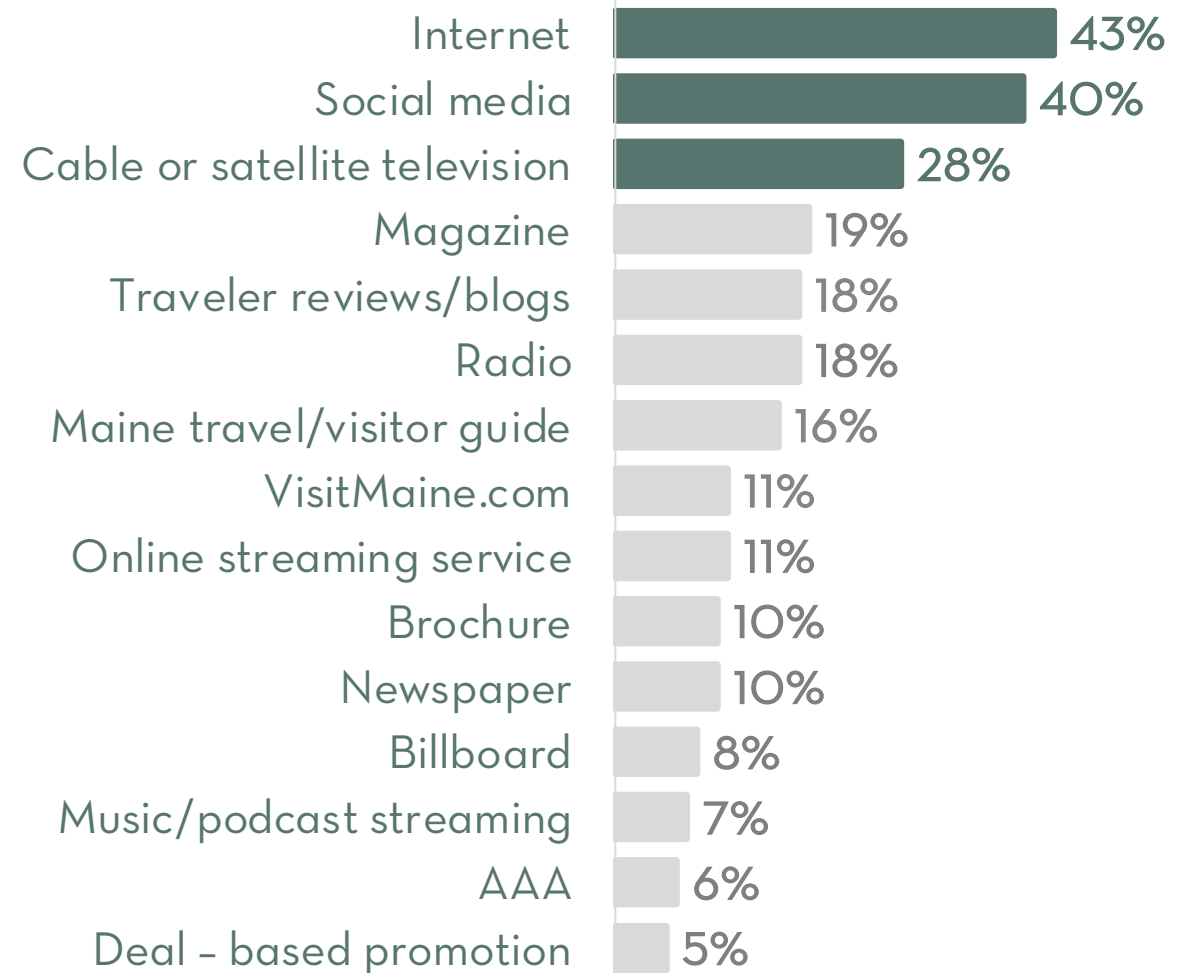
# OTHER STATES & PROVINCES CONSIDERED\*

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



# PRE-TRIP EXPOSURE TO ADVERTISING\*

- » 44% of visitors noticed advertising or promotions for Maine prior to their trip to Greater Portland
- » Visitors who were exposed to this advertising primarily saw it on **the internet** or **social media**

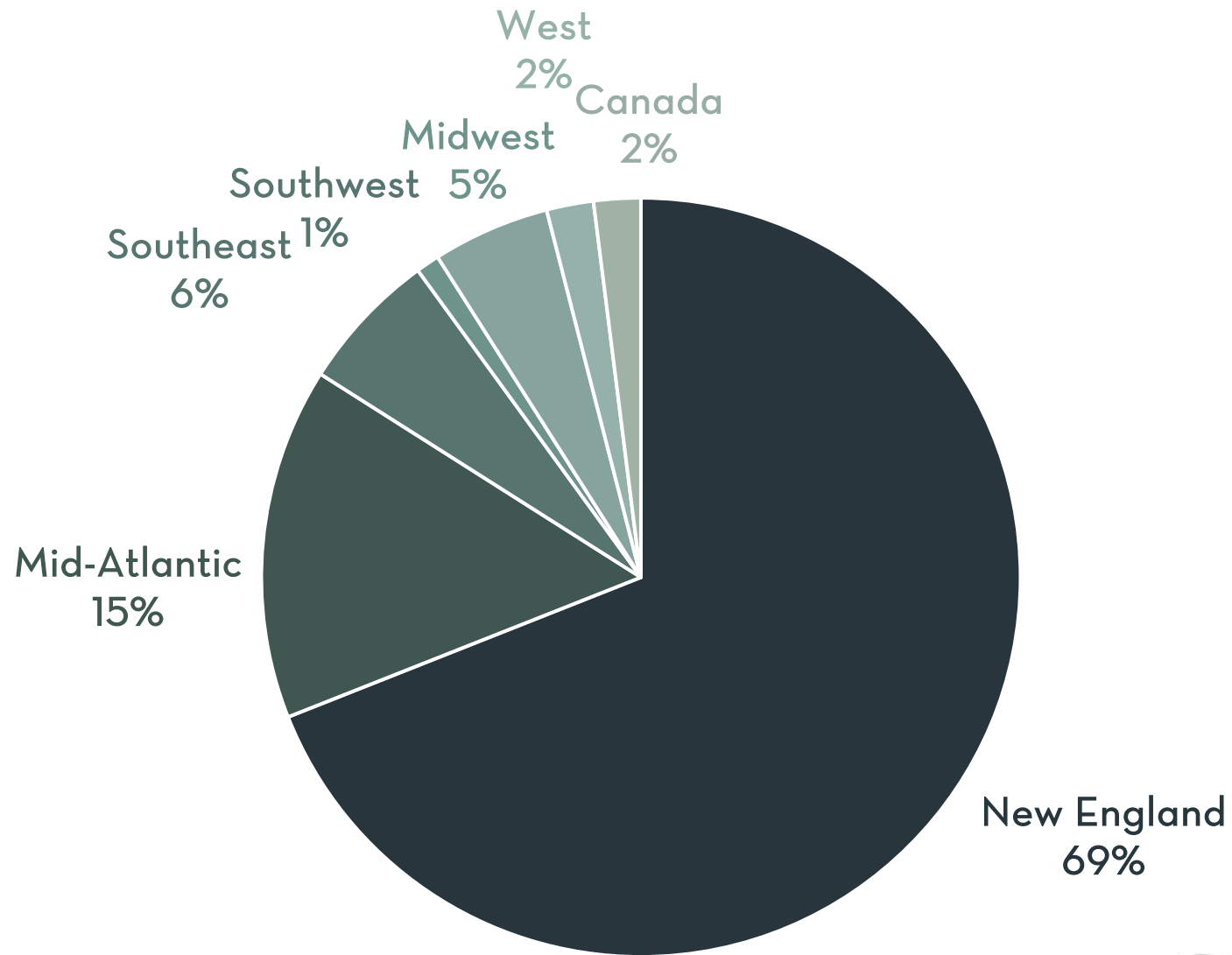




# TRIP PLANNING CYCLE : TRAVELER PROFILE



# VISITOR ORIGINS



# TOP ORIGIN STATES & PROVINCES

- » **Over half** of visitors to Greater Portland were from *Maine, Massachusetts or New Hampshire*
- » **4 in 5** visitors came from **12** U.S. states
- » **1 in 4** visitors to Greater Portland was traveling from another region of *Maine*

| State/Country | Percent |
|---------------|---------|
| Maine         | 25%     |
| Massachusetts | 18%     |
| New Hampshire | 9%      |
| New York      | 7%      |
| Connecticut   | 4%      |
| Florida       | 4%      |
| New Jersey    | 4%      |
| Pennsylvania  | 3%      |
| Maryland      | 2%      |
| Texas         | 2%      |
| Vermont       | 2%      |
| Virginia      | 2%      |



# TOP ORIGIN MARKETS

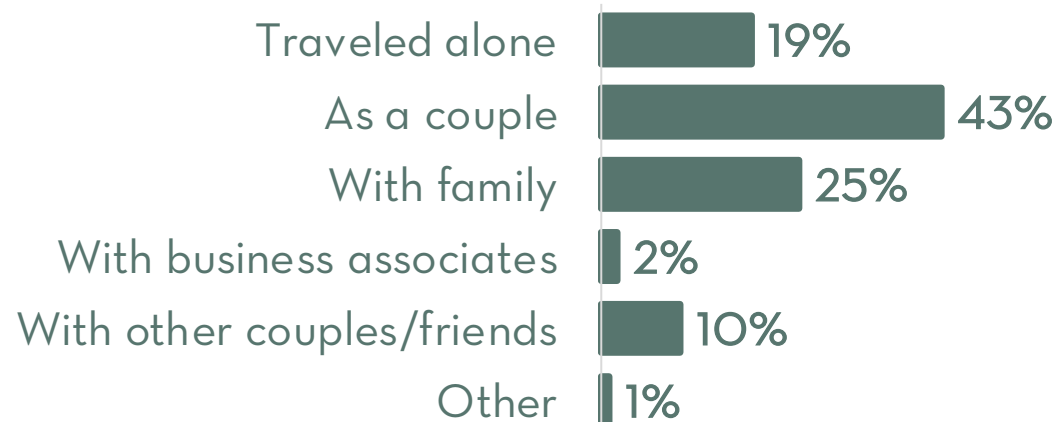
- » More visitors traveled to Greater Portland from **Boston and New York City** than from any other market
- » **Most** visitors to Greater Portland traveled from markets outside of Maine

| Market                        | Percent |
|-------------------------------|---------|
| Boston, MA                    | 10%     |
| New York City, NY             | 8%      |
| Washington DC - Baltimore, MD | 4%      |
| Philadelphia, PA              | 2%      |
| Manchester, NH                | 2%      |

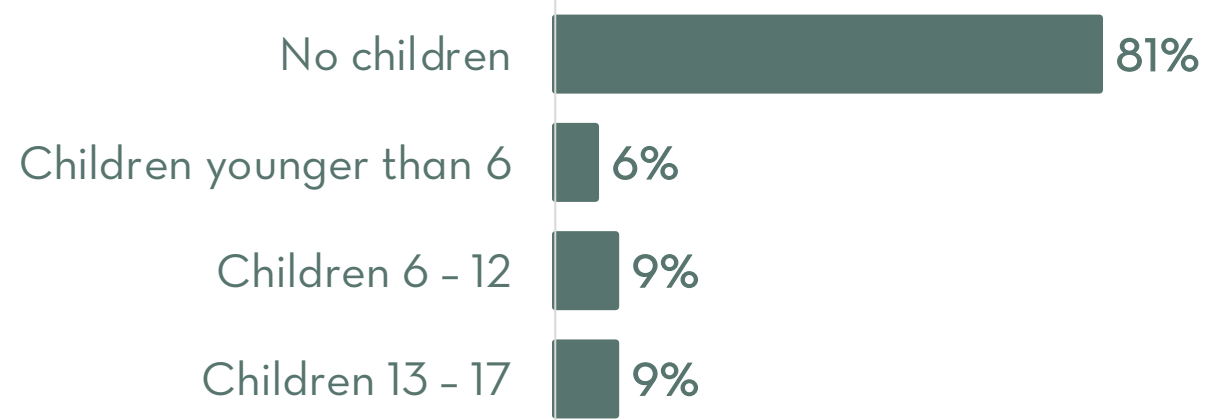
# TRAVEL PARTIES

- » Typical visitors traveled in Greater Portland with a party of 2.5 people
- » 2 in 5 visitors to Greater Portland traveled as a couple
- » 1 in 5 visitors traveled in Greater Portland with one or more children in their travel party

## Travel Party Composition



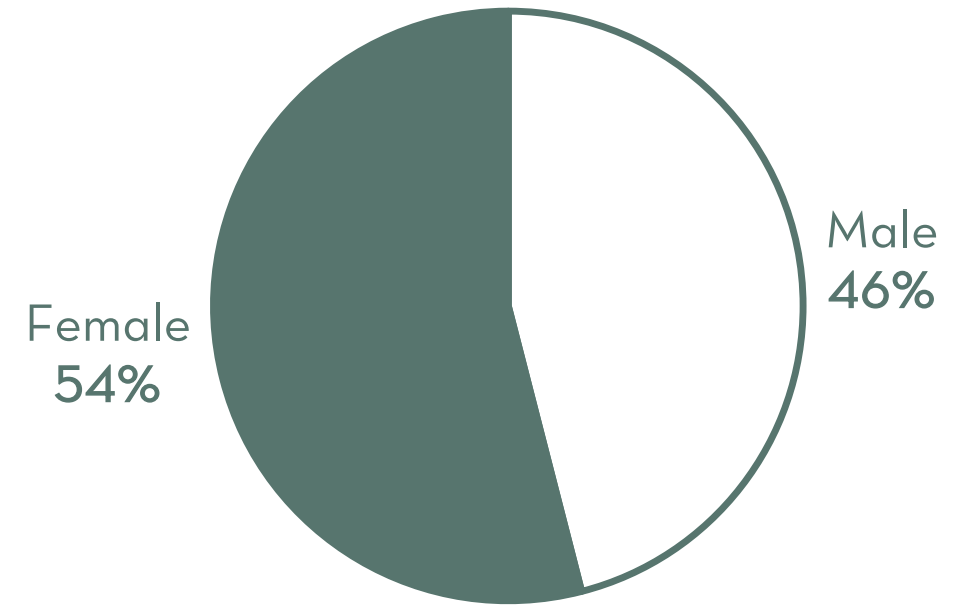
## Children in Travel Party\*



\*Multiple responses permitted.

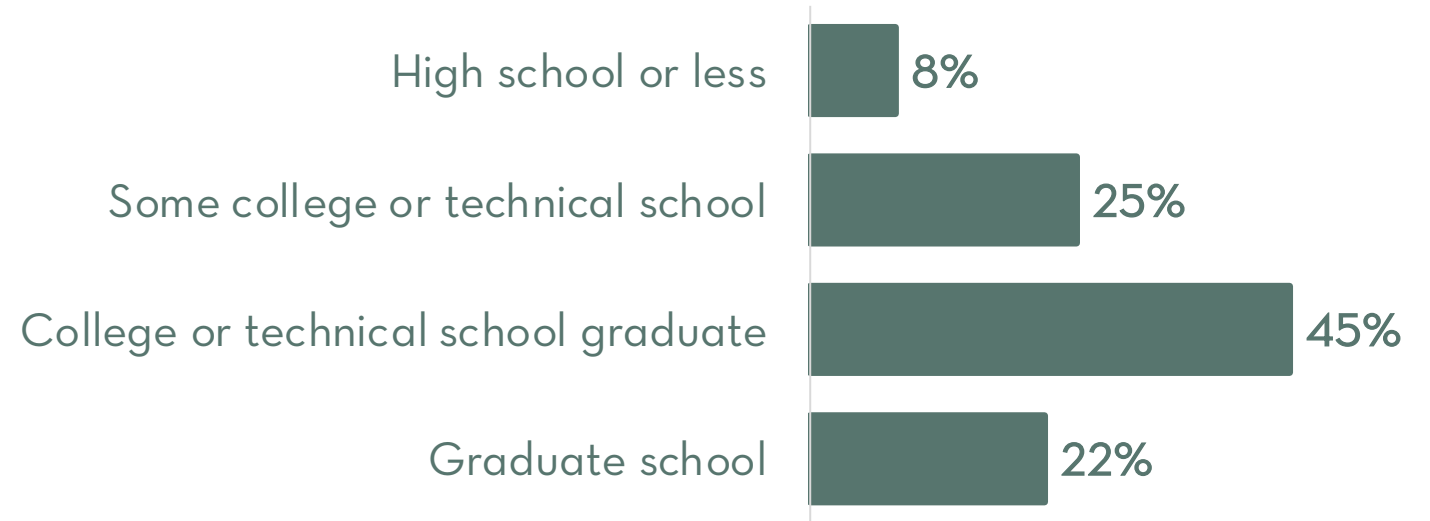
# GENDER

- » Over half of visitors to Greater Portland were female



# EDUCATIONAL ATTAINMENT

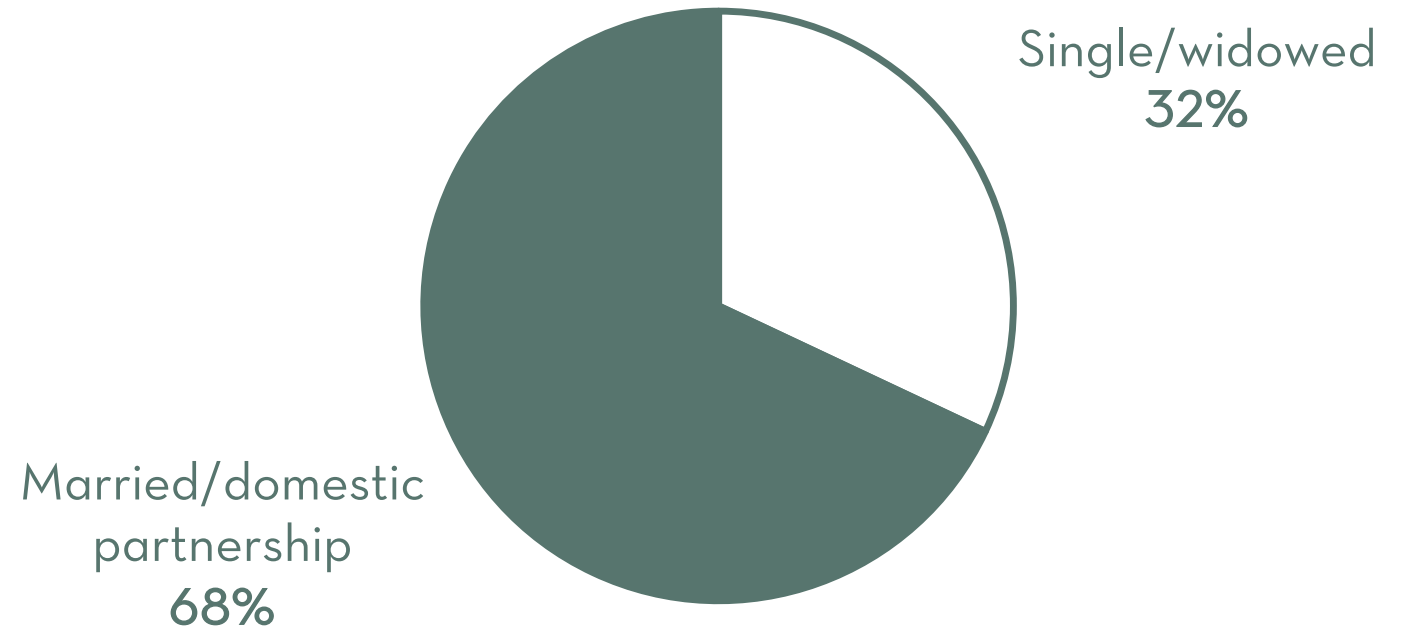
- » Greater Portland visitors have substantial formal educations, with **2 in 3** having a college or technical school degree or higher





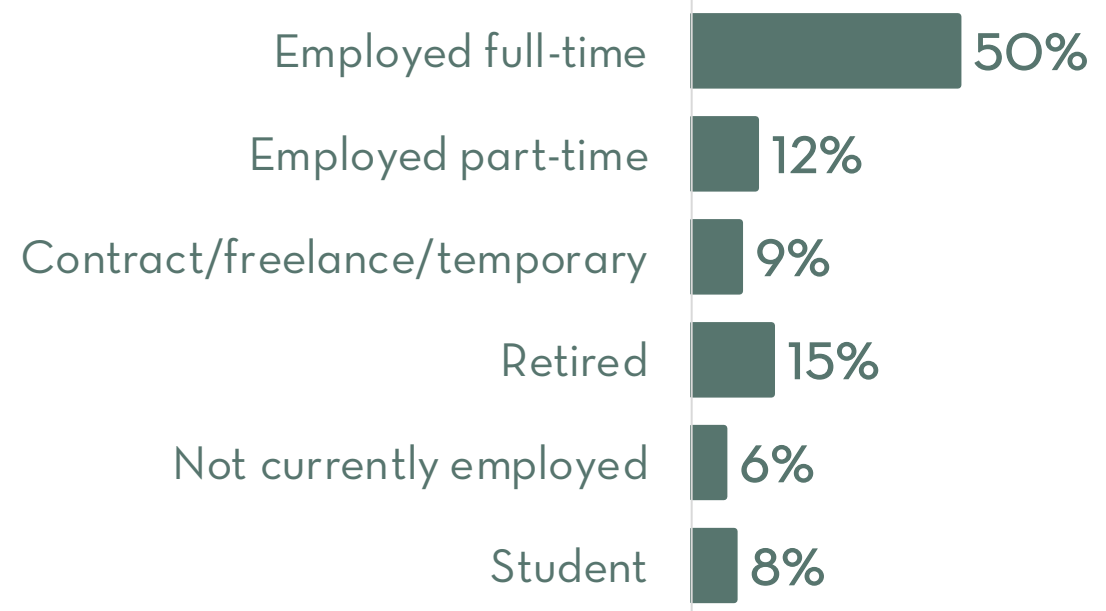
# MARITAL STATUS

- » 2 in 3 visitors to Greater Portland were married or living with their partner



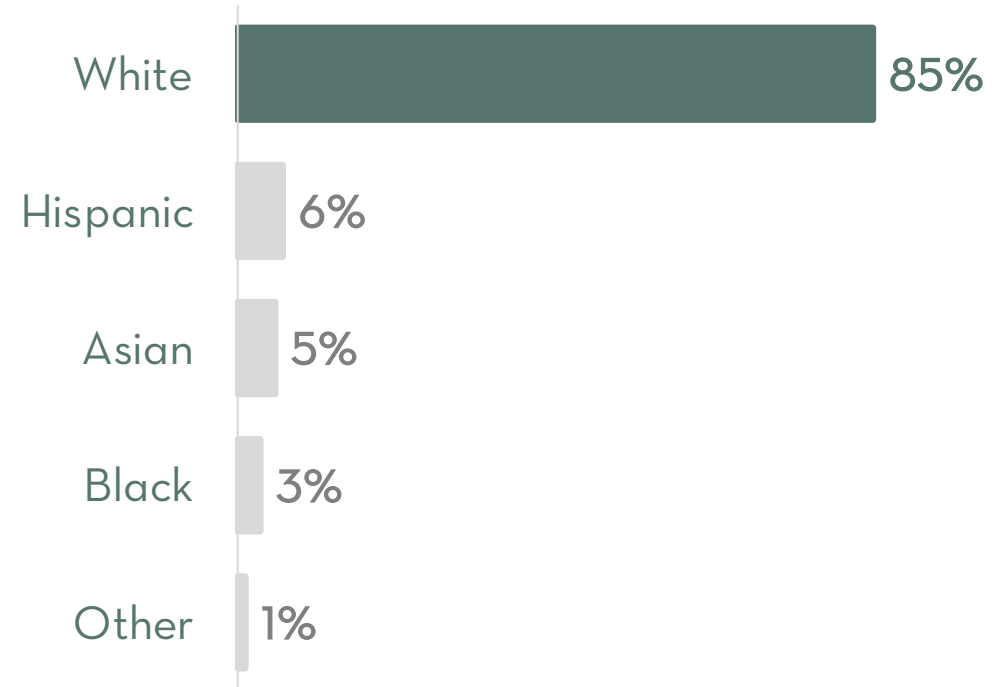
# EMPLOYMENT STATUS

- » Over 7 in 10 visitors to Greater Portland were employed, most full-time



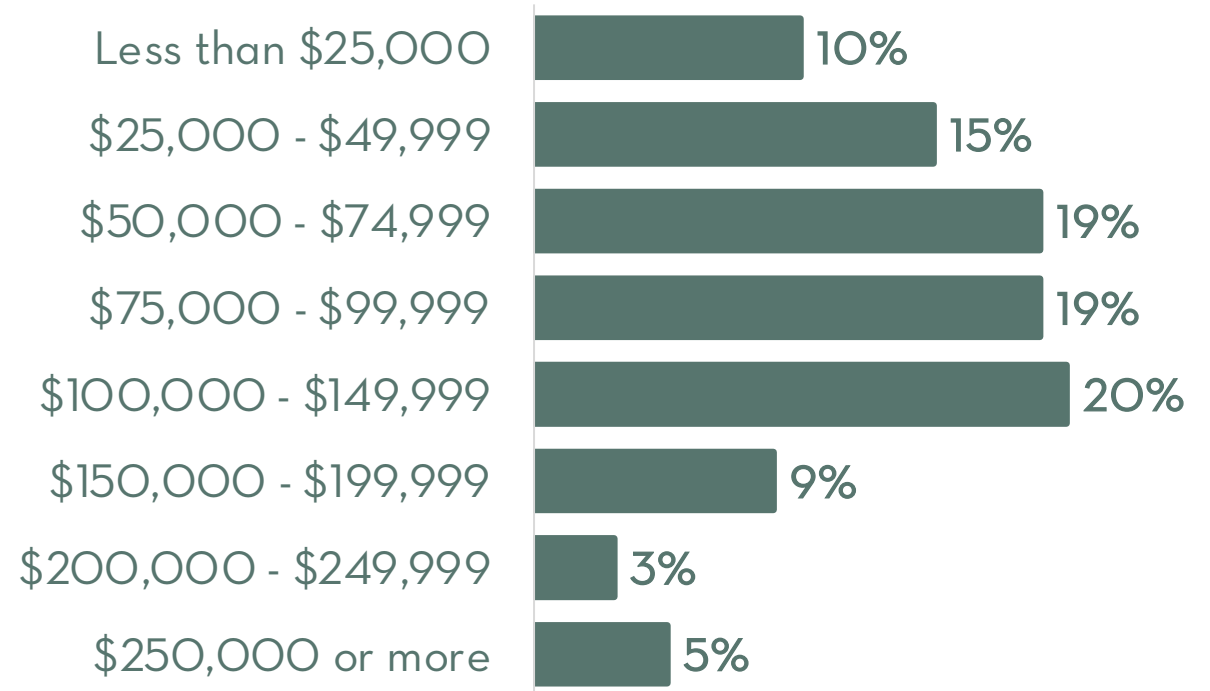
# RACE & ETHNICITY

» Over 4 in 5 visitors to Greater Portland were White/Caucasian



# HOUSEHOLD INCOME

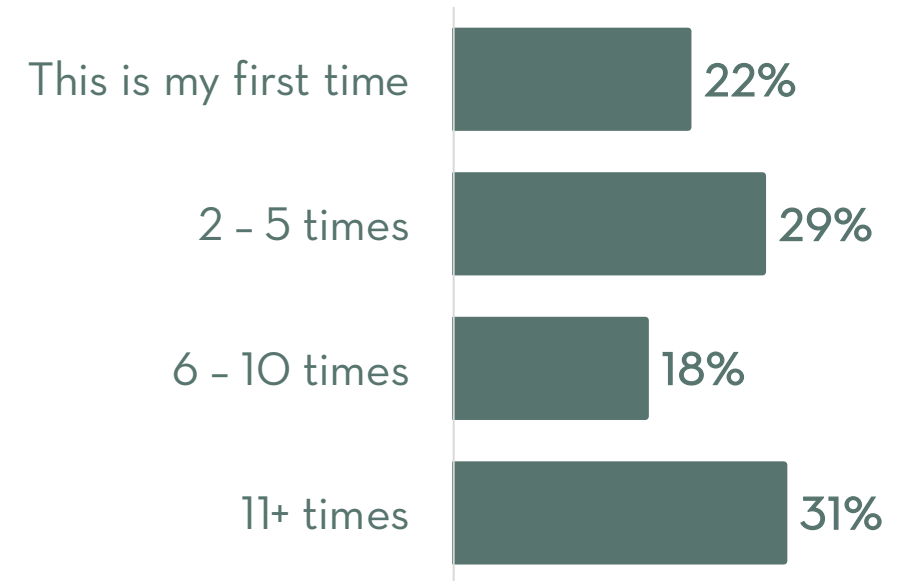
- » Typical visitors to Greater Portland earned **\$82,900** per year in household income
- » **17%** of visitors to Greater Portland have household incomes that exceed \$150,000





# NEW & RETURNING VISITORS

- » Over **1 in 5** visitors to Greater Portland were traveling to Maine for the first time
- » **3 in 10** visitors to Greater Portland had previously traveled in Maine more than 10 times

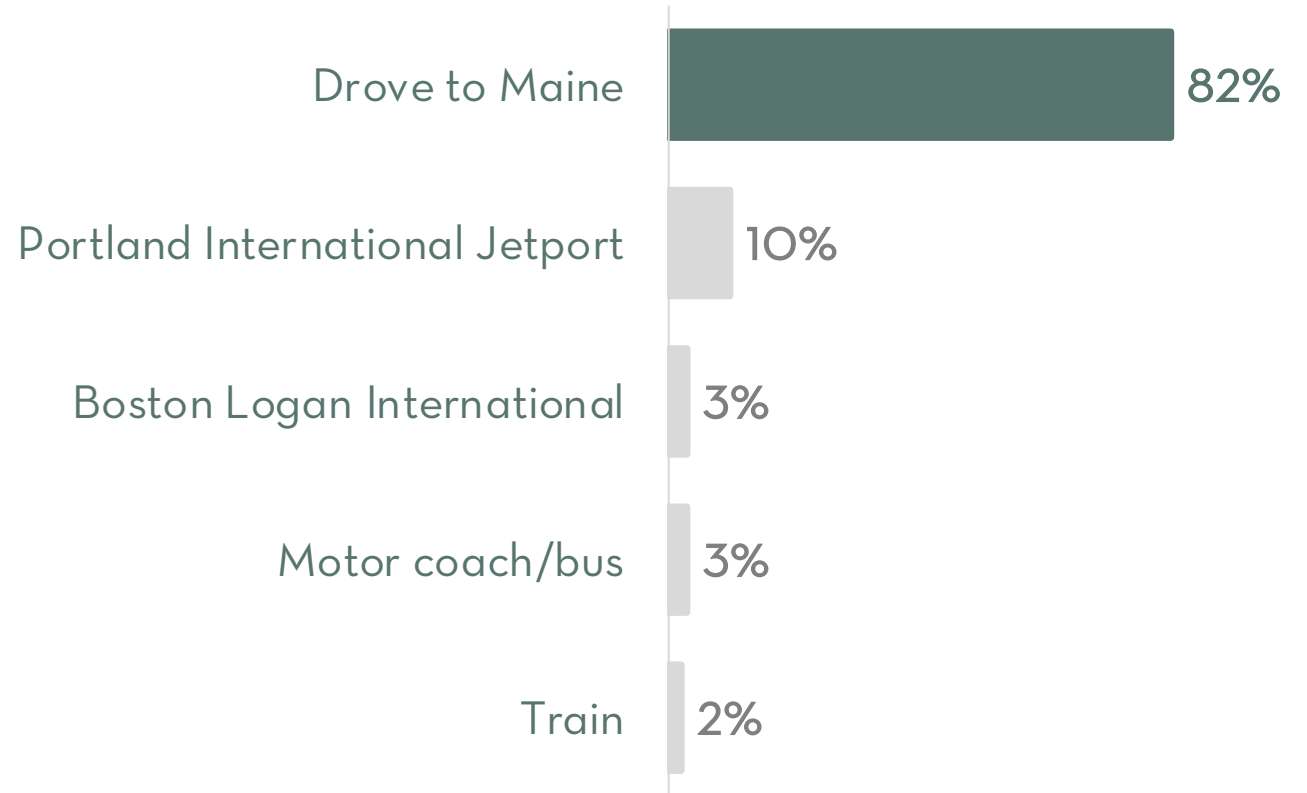


# TRIP PLANNING CYCLE : TRIP EXPERIENCE



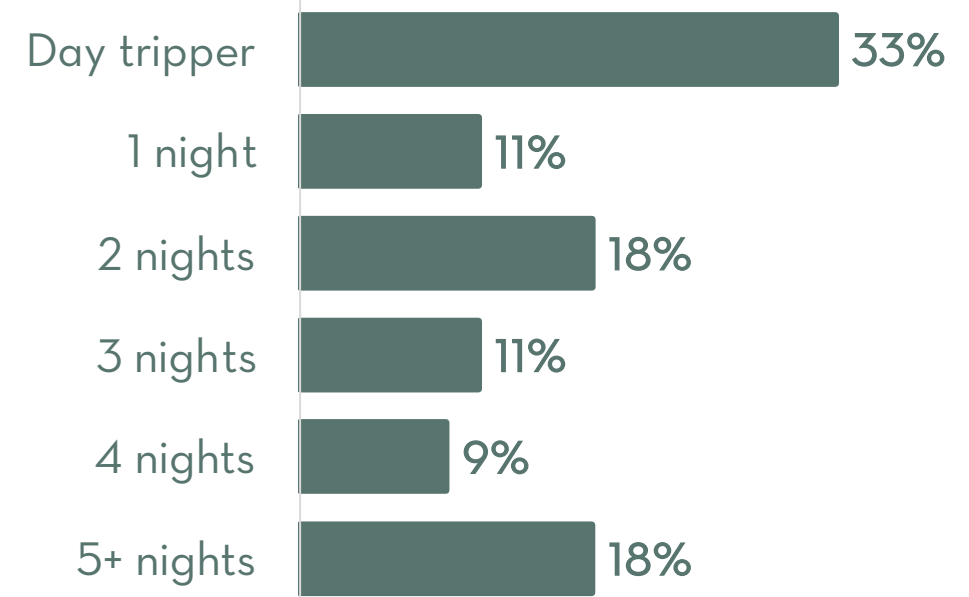
# MODES OF TRANSPORTATION

- » Greater Portland is a drive-market for most visitors as **4 out of 5** choose to travel by car rather than by plane, motor coach/bus, or train
- » **Most** visitors to Greater Portland who flew to Maine arrived at Portland International Jetport



# NIGHTS STAYED

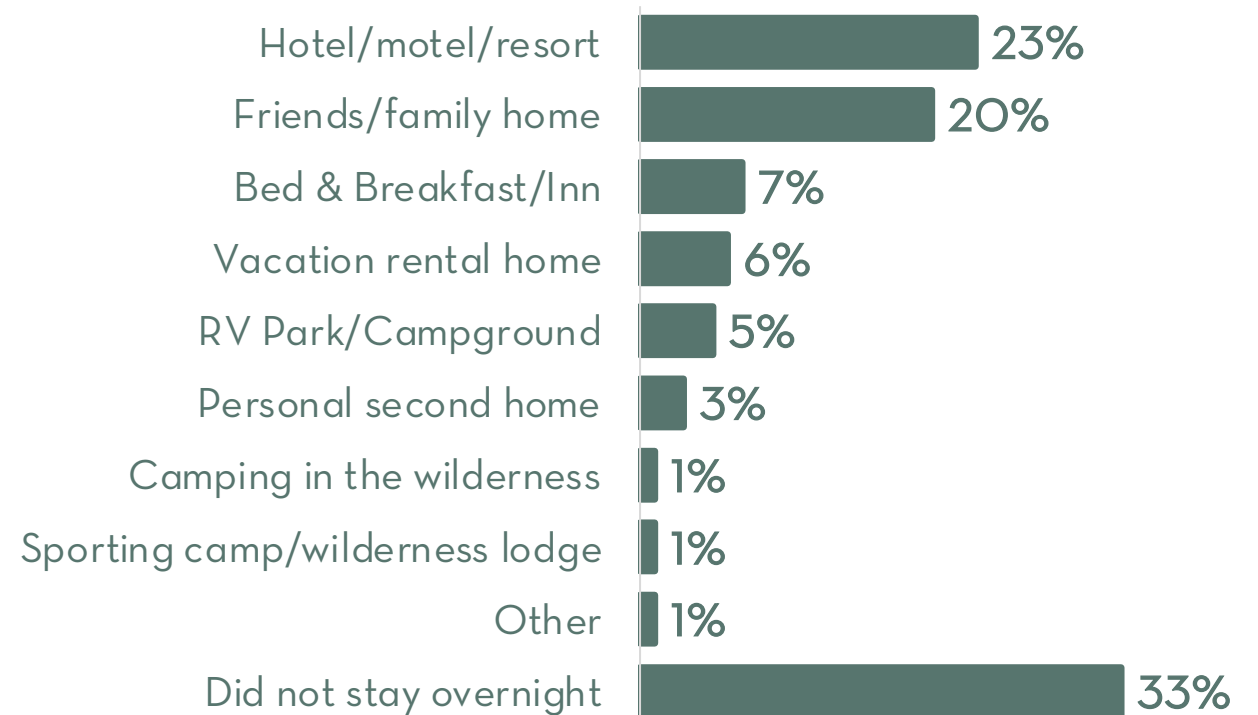
- » 67% of visitors to Greater Portland stayed one night or more in Maine during their trip
- » Typical visitors to Greater Portland stayed 4.1 nights in Maine
- » 1 in 3 visitors to Greater Portland did not stay overnight in Maine





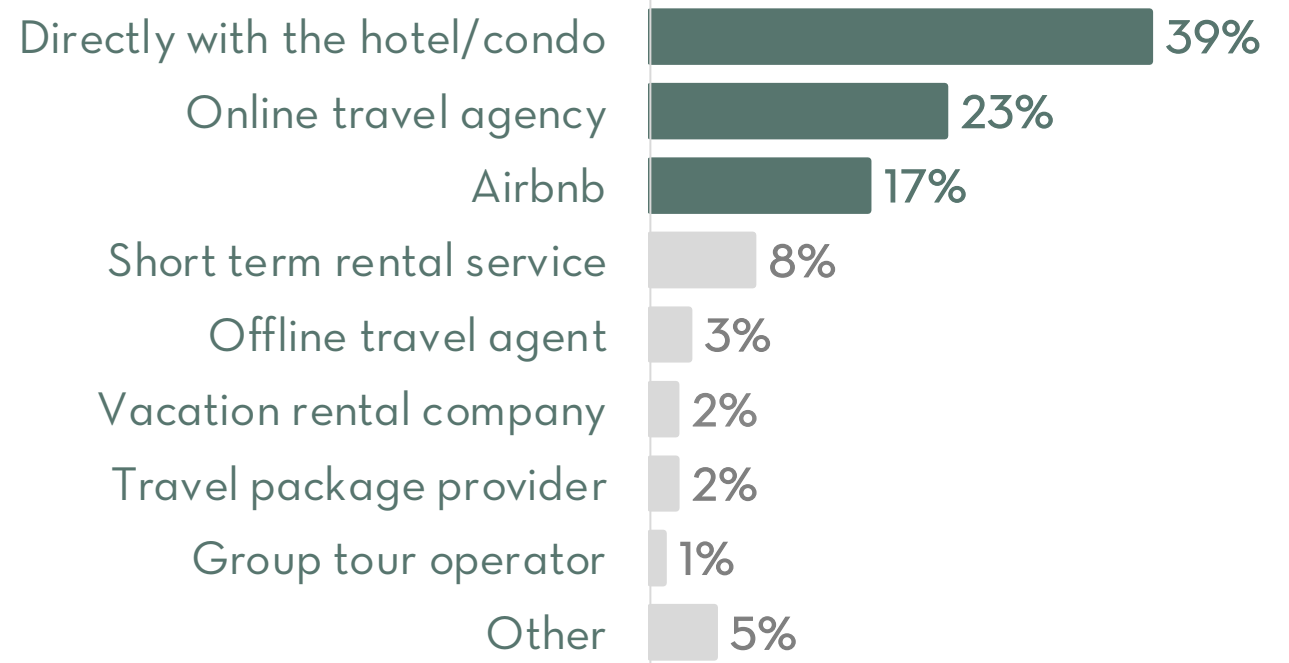
# ACCOMMODATIONS

- » **Nearly 1 in 4** visitors to Greater Portland stayed overnight in a hotel, motel, or resort
- » **1 in 5** visitors to Greater Portland stayed overnight with friends or relatives



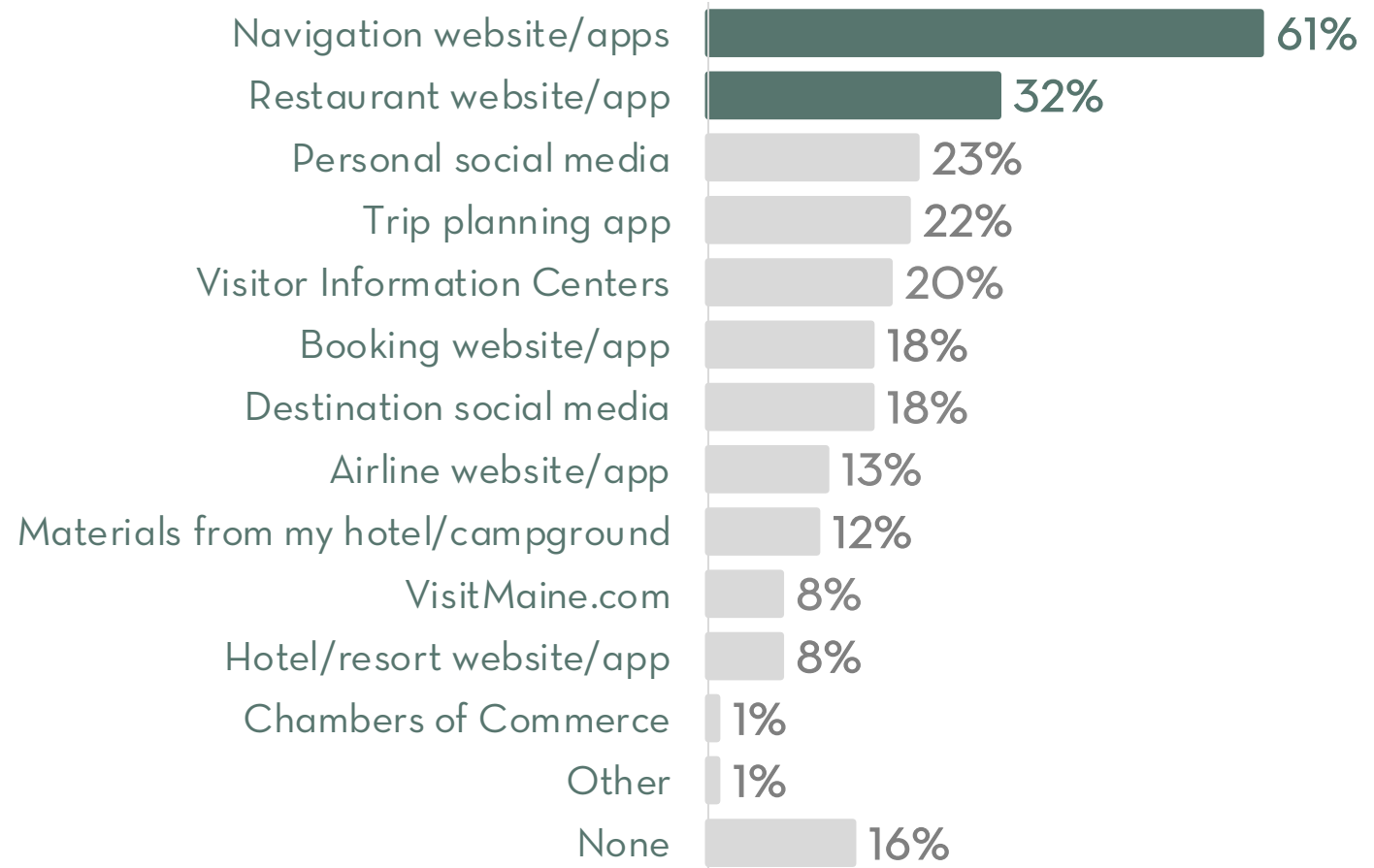
# BOOKING METHODS

- » Over 2 in 5 visitors to Greater Portland stayed overnight in paid accommodations during their trip in Maine
- » 39% of visitors to Greater Portland who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



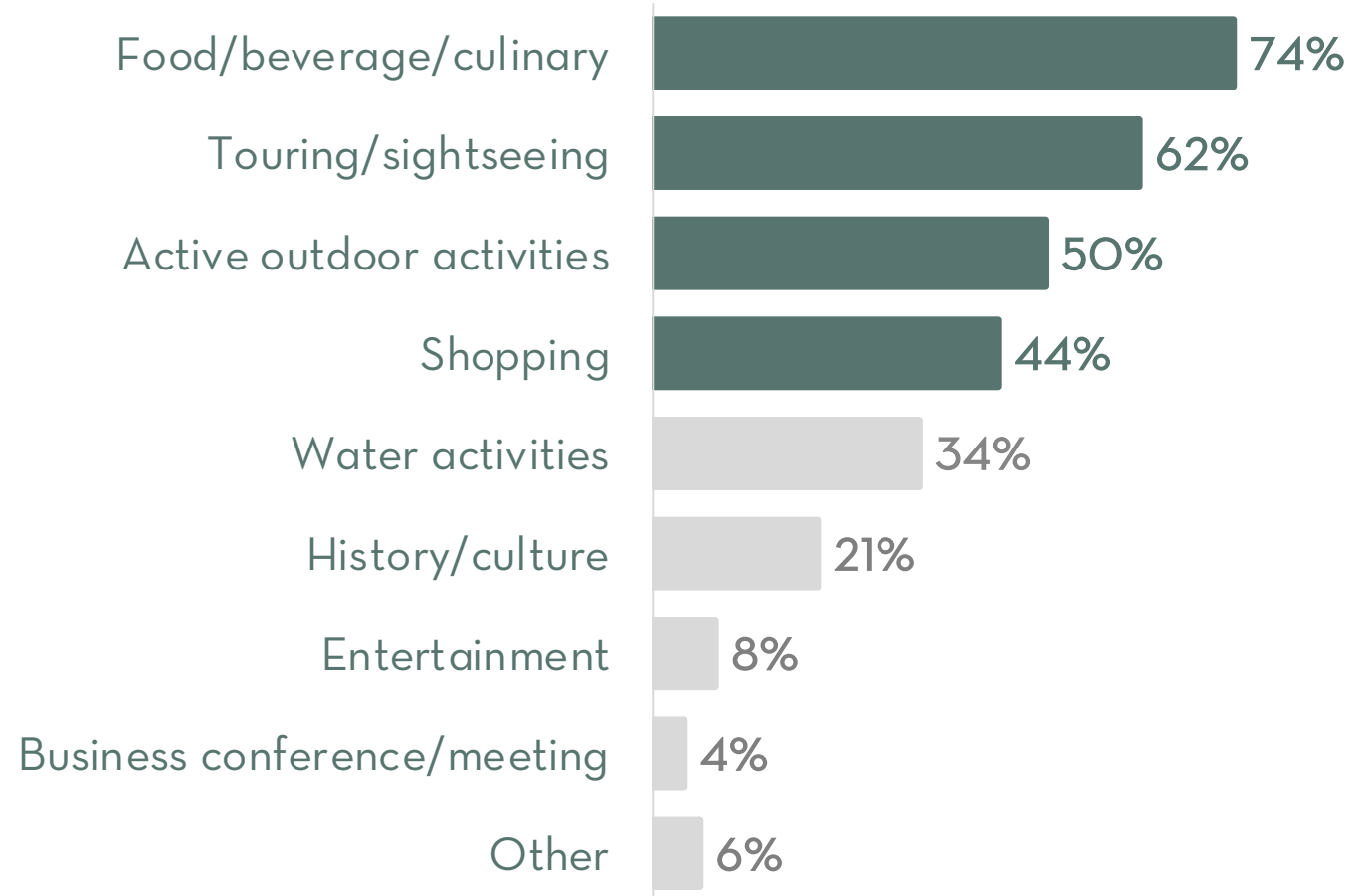
# IN-MARKET VISITOR RESOURCES\*

- » Visitors to Greater Portland were **more likely** to rely on navigation and restaurant websites/apps to plan activities in-market
- » **1 in 5** visitors used Visitor Information Centers
- » **1 in 6** visitors did not use any resources to plan activities while they were in Greater Portland



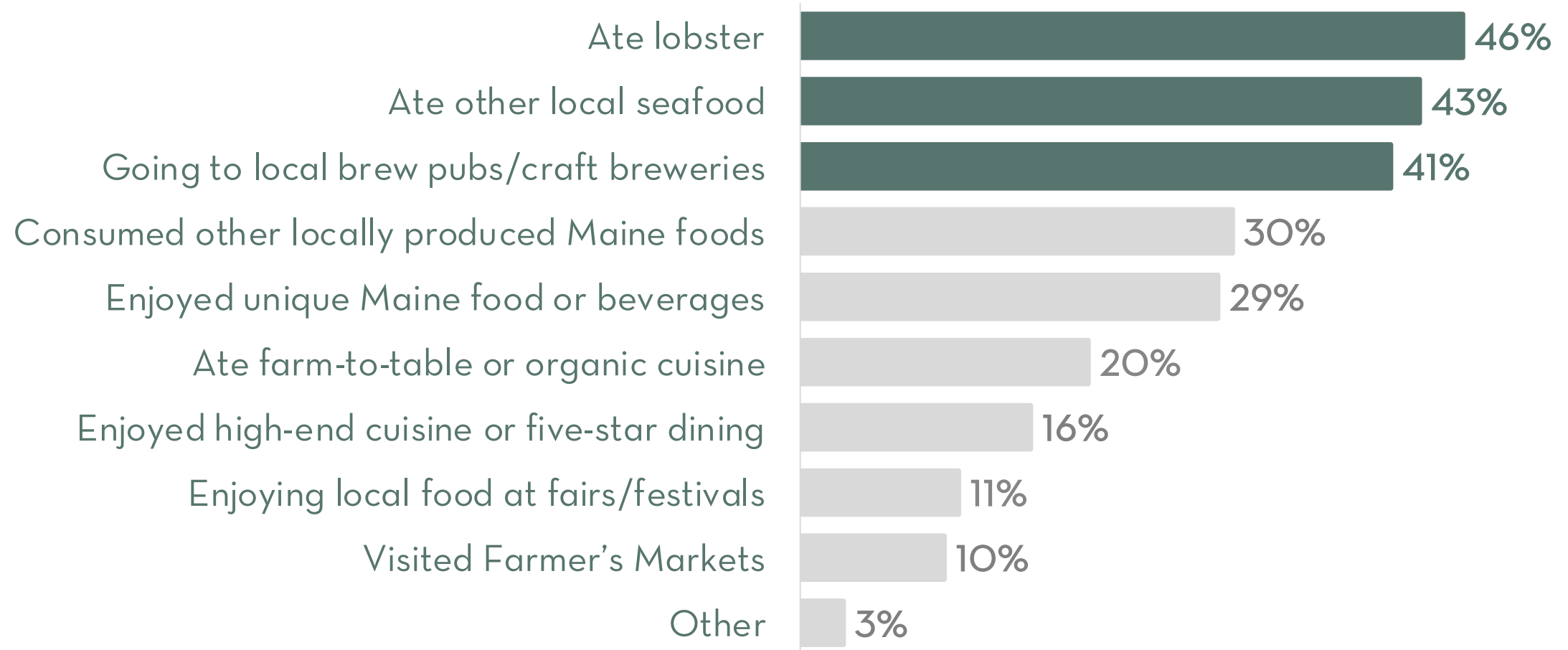
# VISITOR ACTIVITIES\*

- » Nearly 3 in 4 of visitors participated in food, beverage, and culinary activities during their trip in Greater Portland
- » Over 3 in 5 visitors to Greater Portland engaged in touring and sightseeing activities

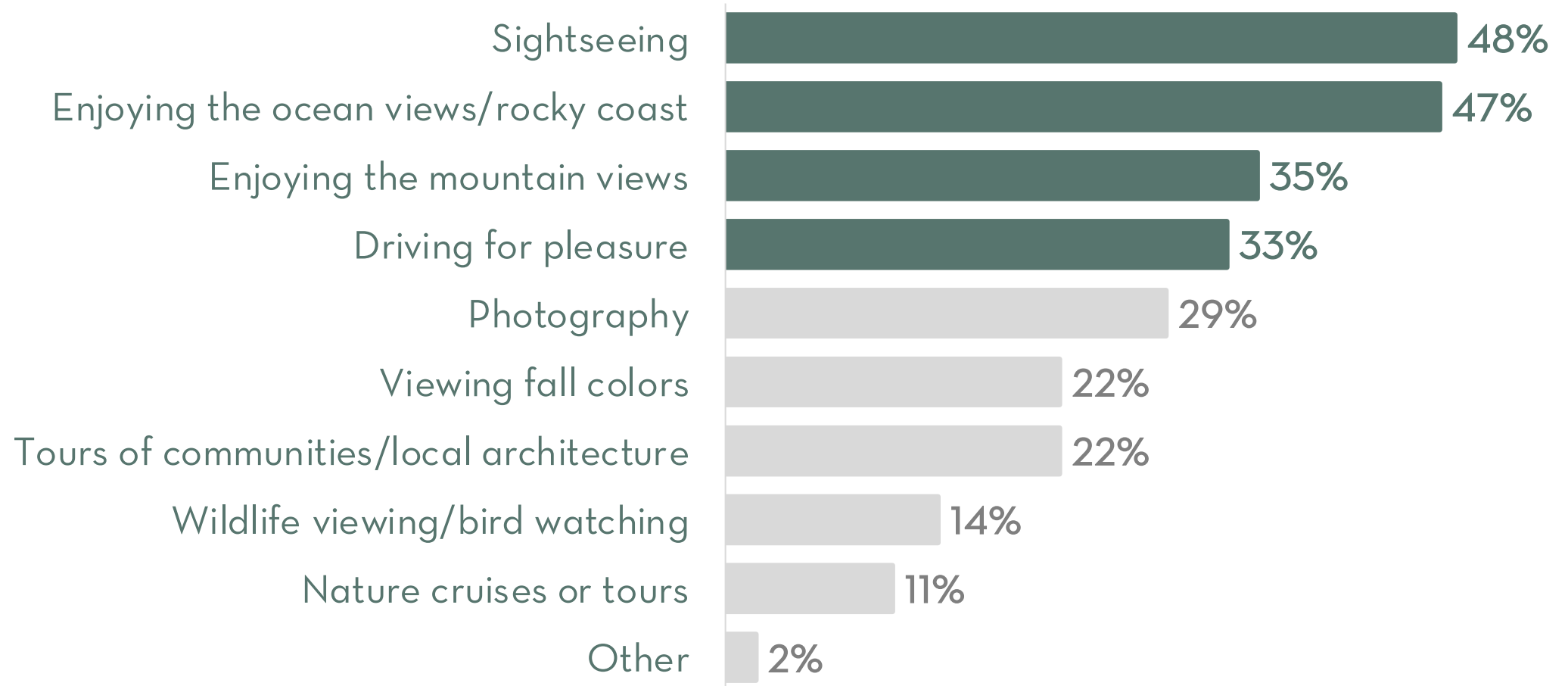




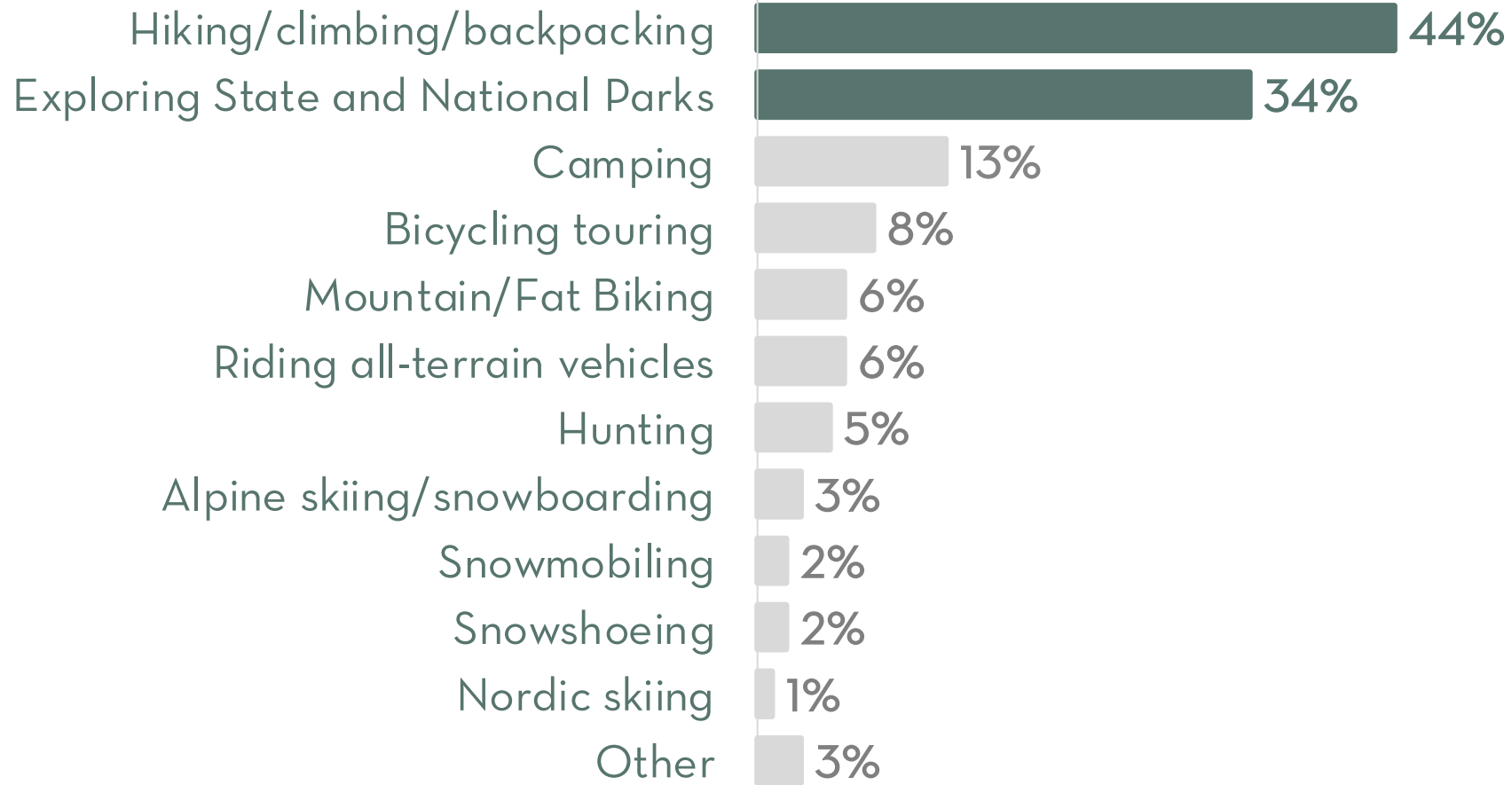
# FOOD & BEVERAGE ACTIVITIES\*



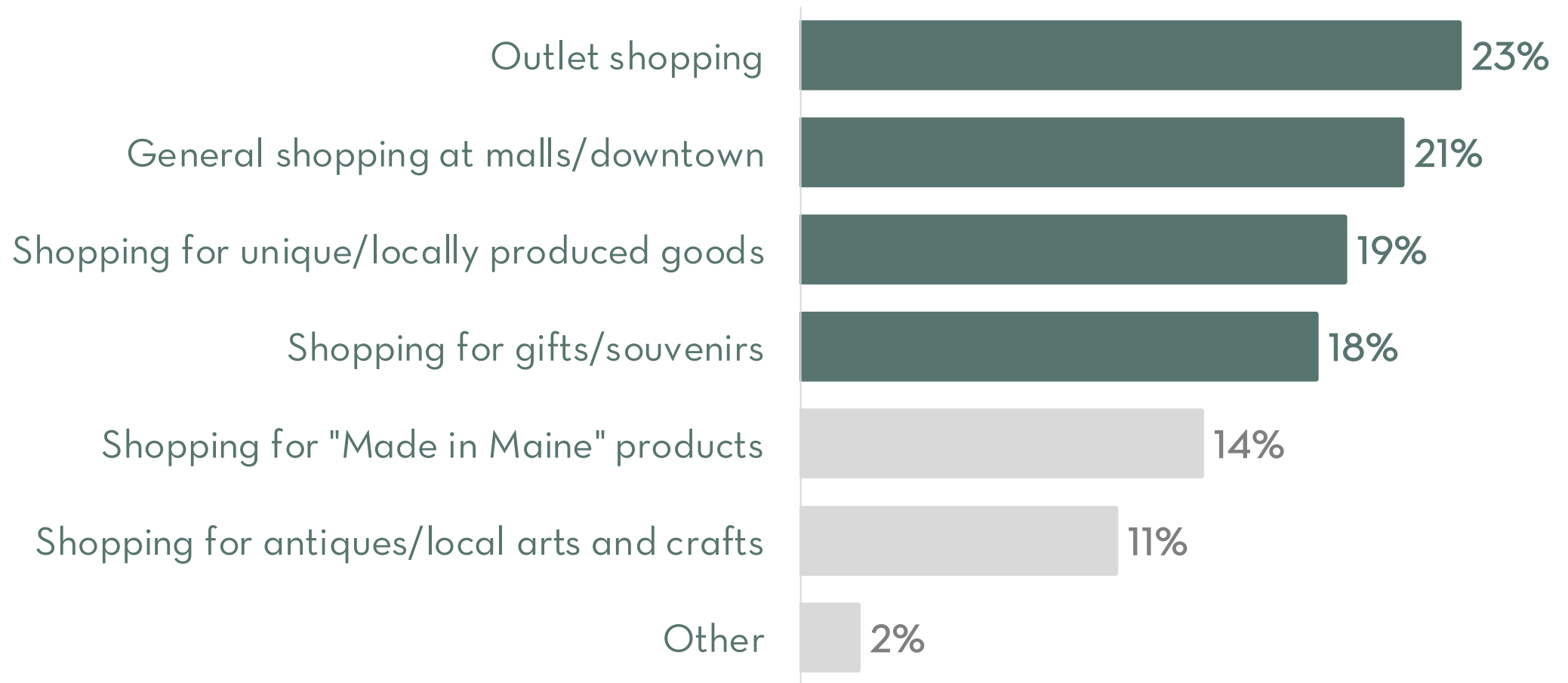
# TOURING & SIGHTSEEING ACTIVITIES\*



# ACTIVE OUTDOOR ACTIVITIES\*

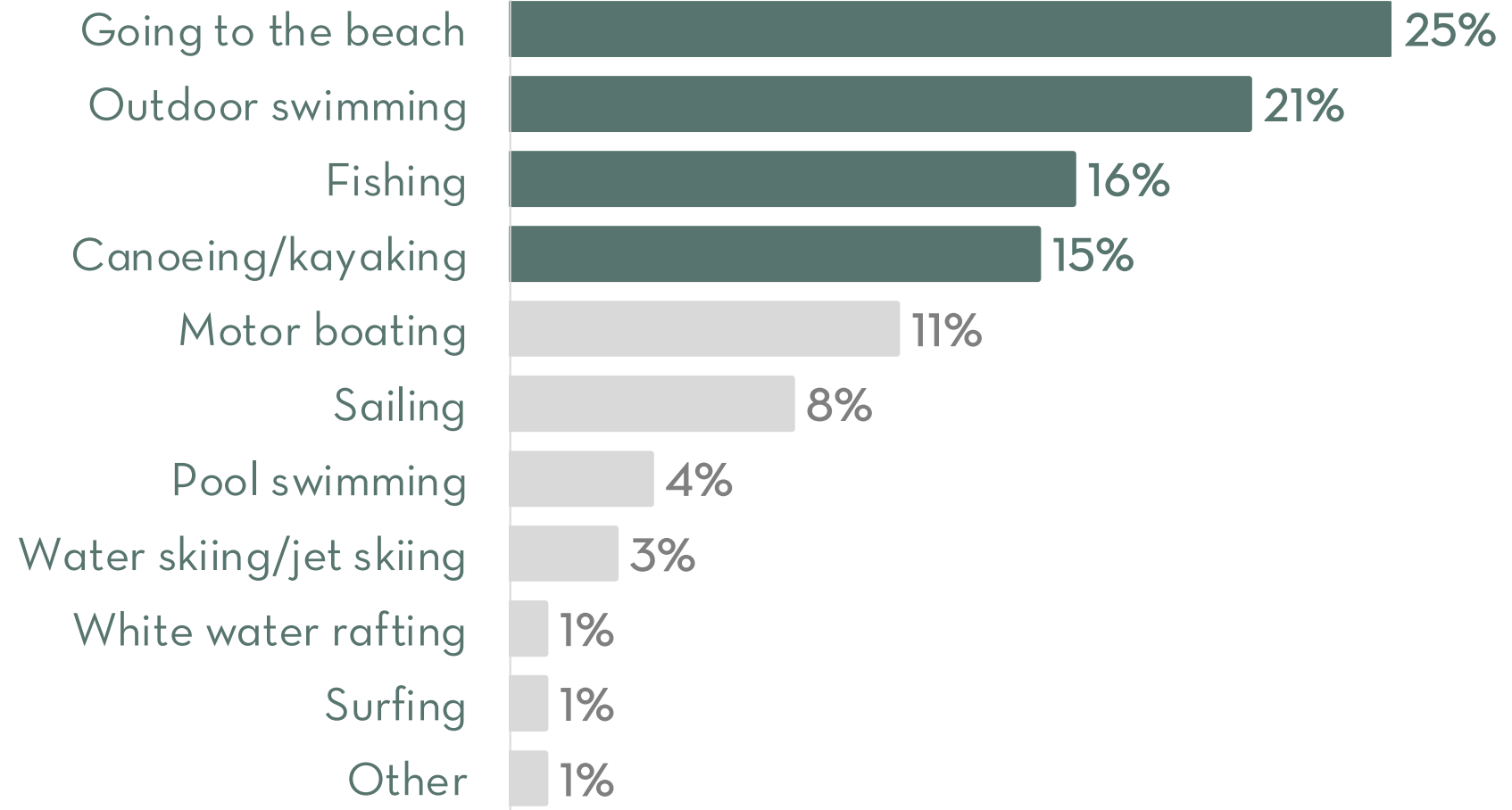


# SHOPPING ACTIVITIES\*

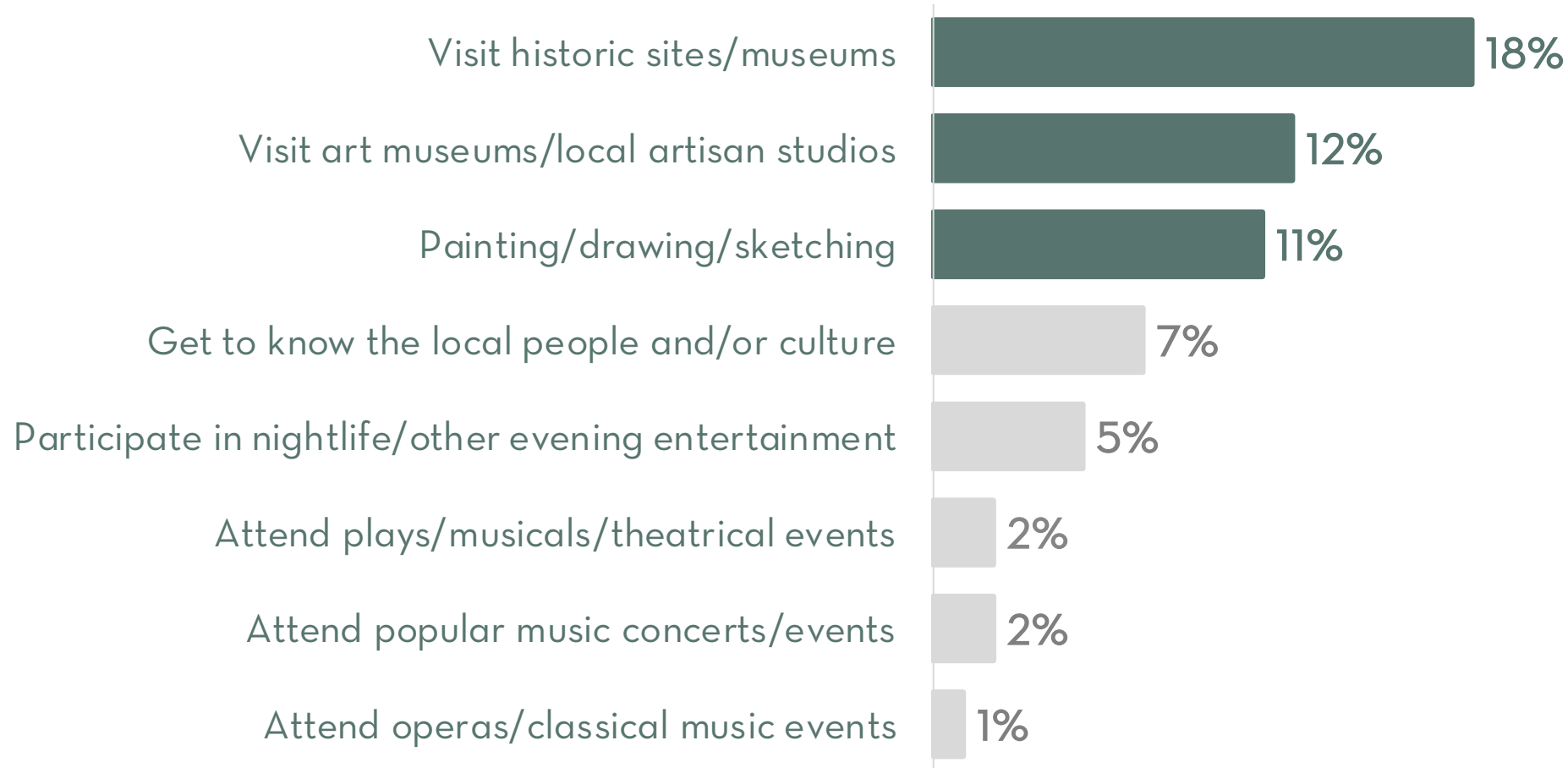




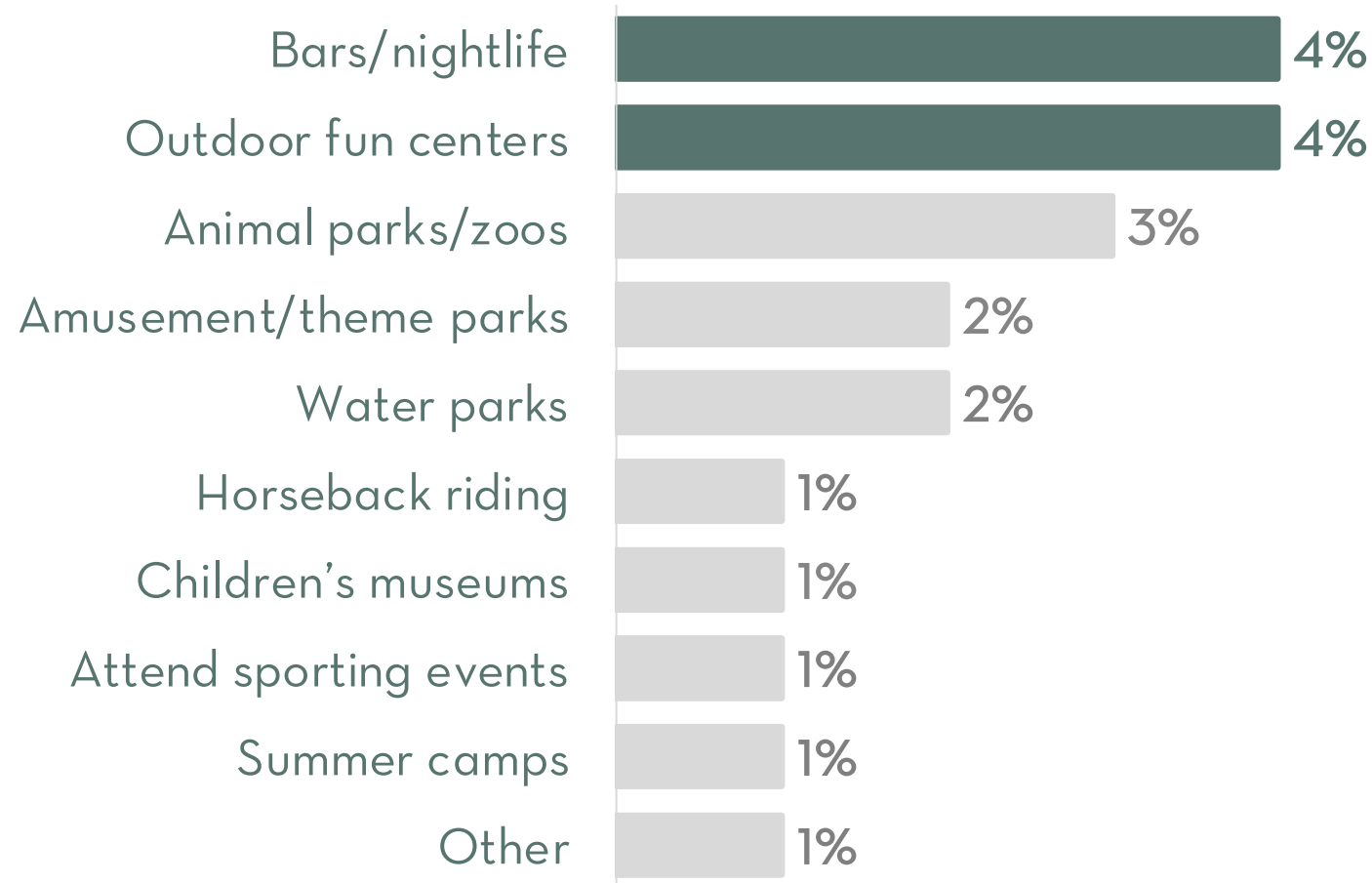
# WATER ACTIVITIES\*



# HISTORICAL & CULTURAL ACTIVITIES\*

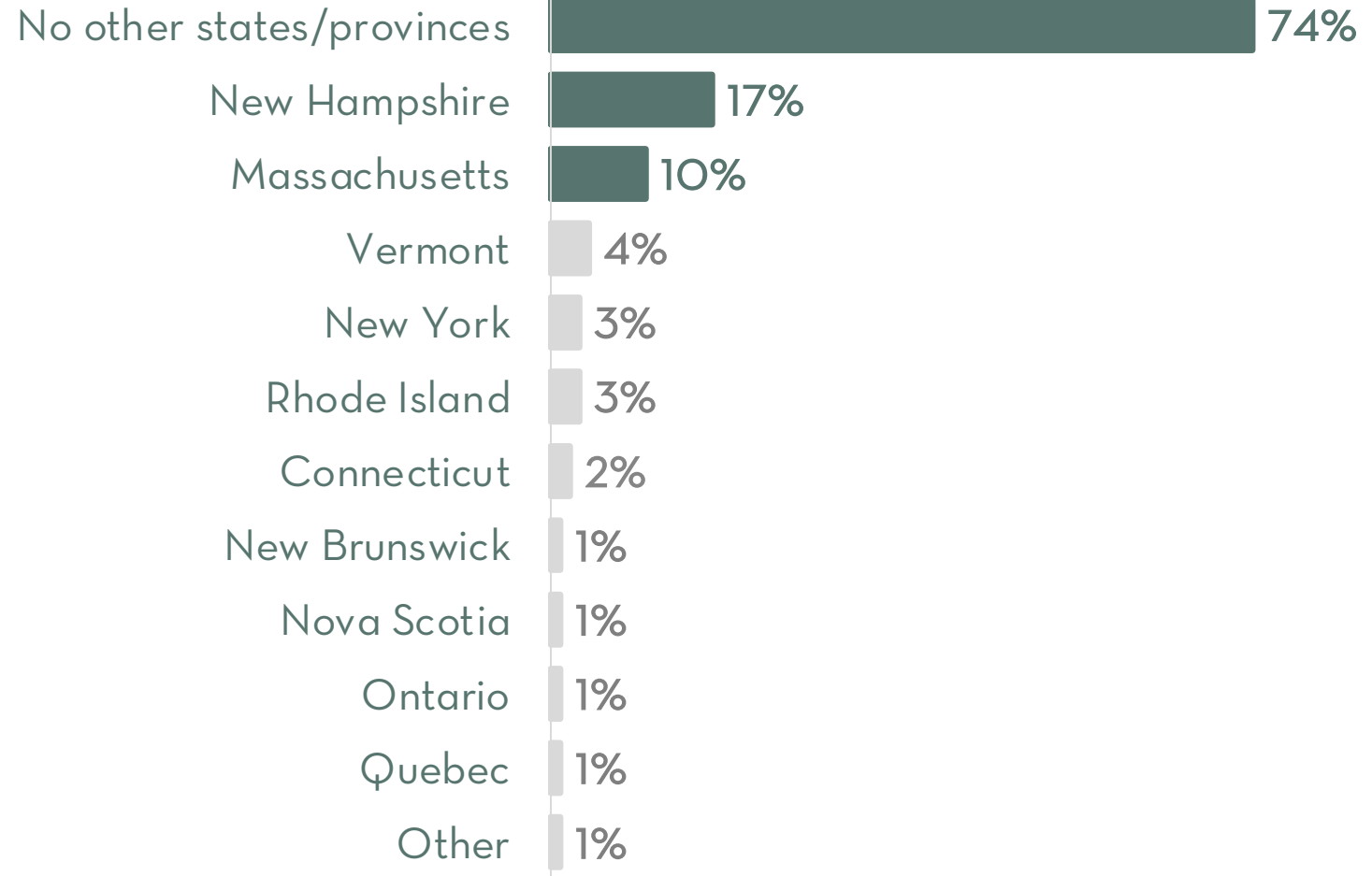


# ENTERTAINMENT ACTIVITIES\*



# OTHER STATES & PROVINCES VISITED\*

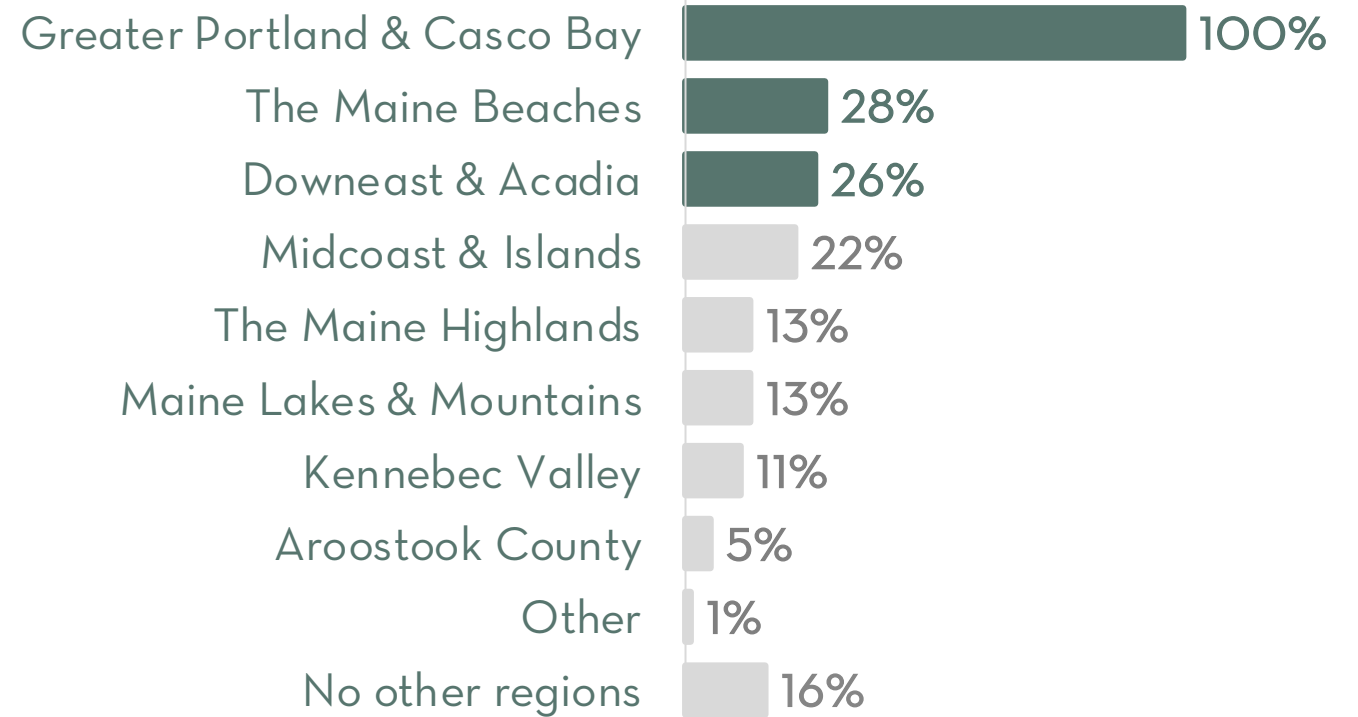
- » 3 in 4 visitors did not visit any other U.S. state or Canadian province on their trip to Greater Portland
- » Visitors were **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip, due to Canadian COVID-19 travel restrictions





# REGIONS VISITED WITHIN MAINE\*

- » **1 in 6** visitors stayed within Greater Portland during their trip, rather than traveling throughout the state
- » **Nearly 3 in 10** visitors to Greater Portland visited the Maine Beaches and over **1 in 4** visited the Downeast & Acadia area during their trip



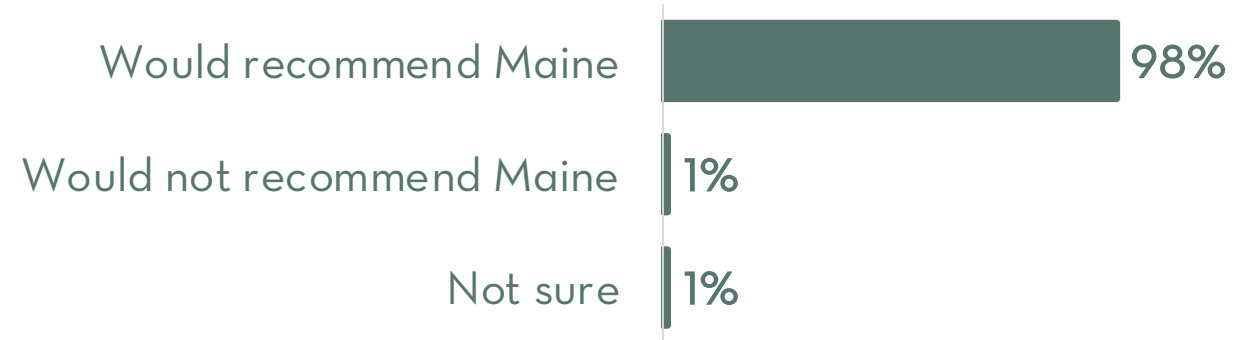
# TRIP PLANNING CYCLE : POST-TRIP EVALUATION



# RECOMMENDING MAINE & ITS REGIONS

- » **98%** of visitors to Greater Portland would recommend that their friends and family visit Maine

## *Likelihood of Recommending Maine*

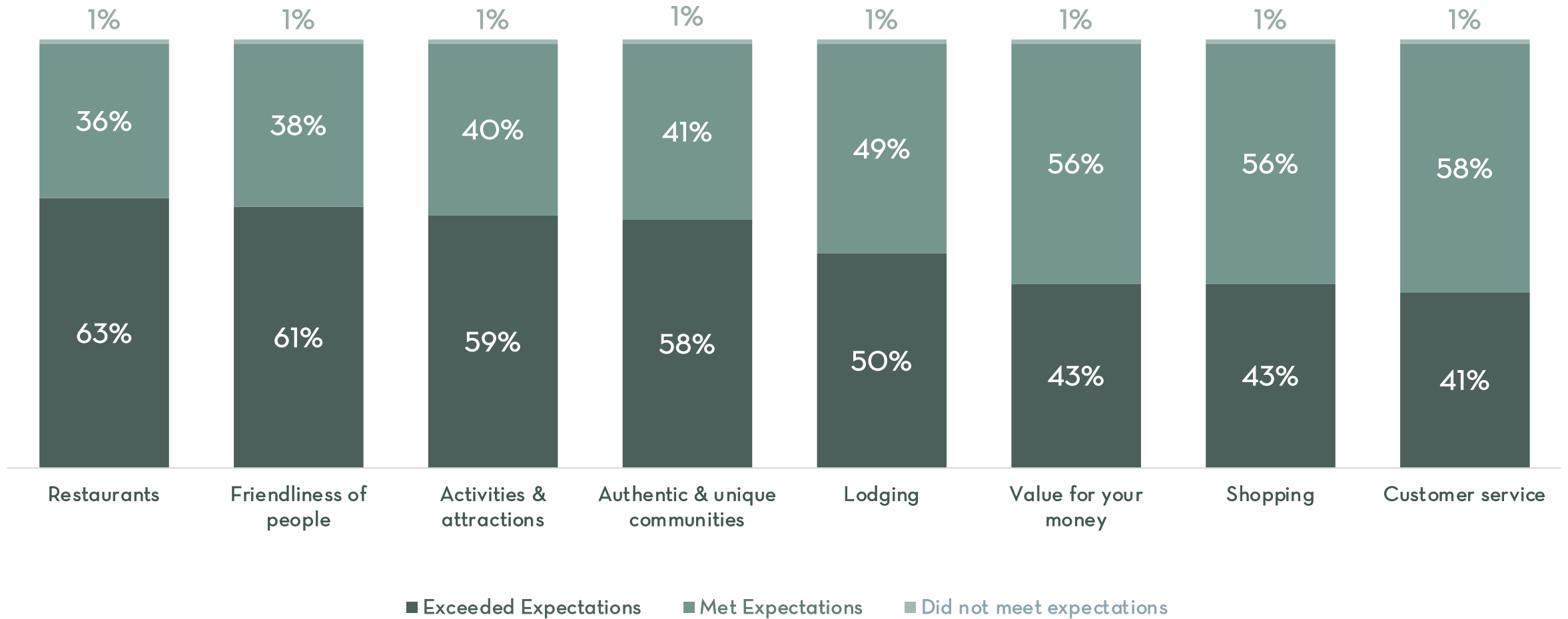


- » **98%** of visitors would recommend that their friends and family visit the Greater Portland & Casco Bay area

## *Likelihood of Recommending Greater Portland*



# TRIP EXPECTATIONS

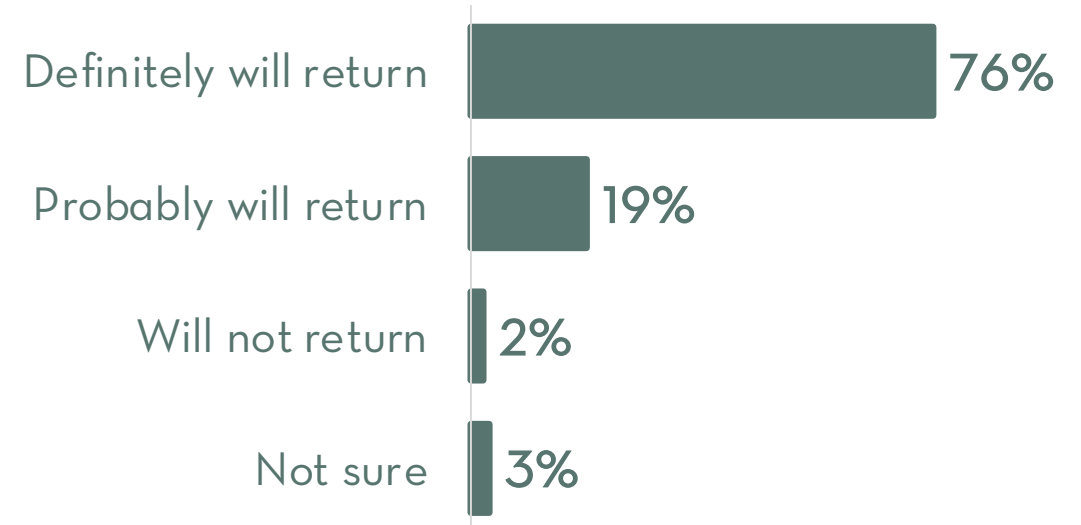


“Don’t know” responses omitted.



# LIKELIHOOD OF RETURNING TO MAINE

- » 95% of visitors to Greater Portland will return to Maine for a future visit or vacation



# GREATER PORTLAND & CASCO BAY

## 2020 Visitor Tracking & Economic Impact Report January – December 2020

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