

KENNEBEC VALLEY

2020 Economic Impact & Visitor Tracking Report
January - December 2020

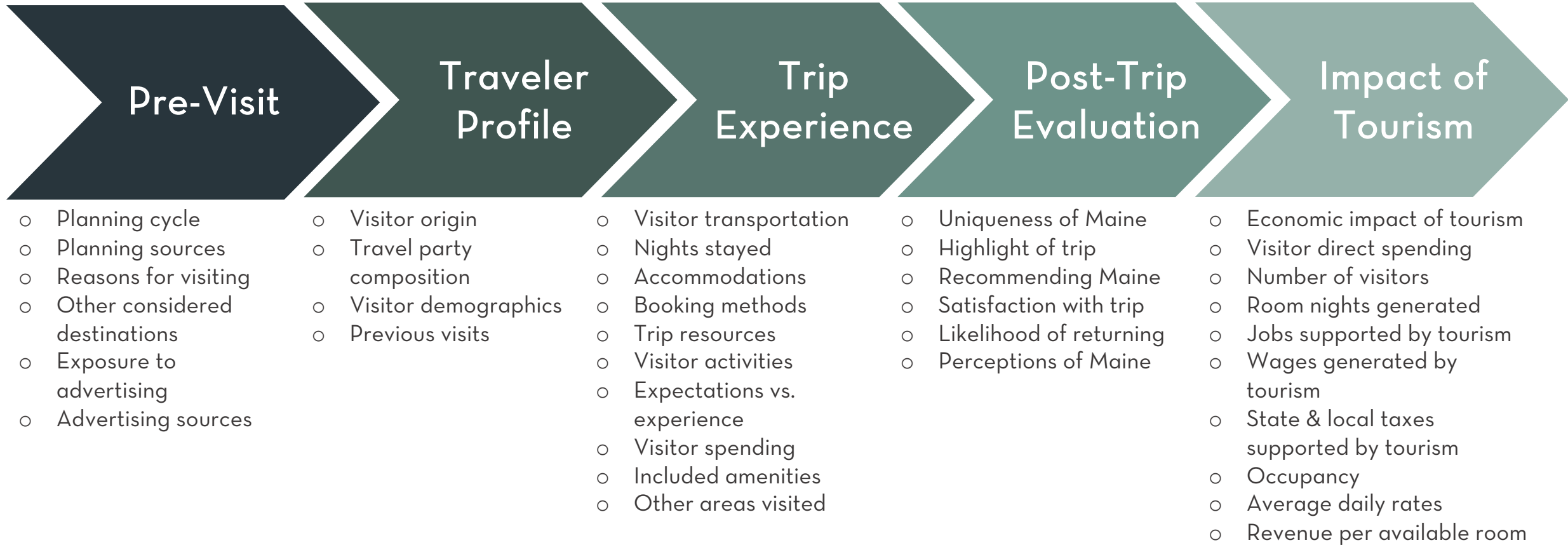


INTRODUCTION



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 **Kennebec Valley** region.



METHODOLOGY



Visitor Tracking

352 interviews were completed with visitors to the Kennebec Valley region online and in-person at 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 the Kennebec Valley region 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.

KENNEBEC VALLEY



Compared to visitors to other regions, visitors to Kennebec Valley region are more likely to:

- » Travel for business-related reasons
- » Participate in historical and cultural activities on their trips
- » Use the Maine Visitor Guide
- » Stay in their second home while visiting Maine
- » Stay in the Kennebec Valley for the entirety of their trip to Maine

TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending in 2020 generated

\$501,282,100

in economic impact to the Kennebec Valley
region



DIRECT SPENDING

Visitors who took a trip to the Kennebec Valley region in 2020 spent

\$321,334,700

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



VISITORS

The Kennebec Valley region
attracted

627,700

visitors in 2020



ROOM NIGHTS

Visitors to the Kennebec Valley
region generated

462,800

room nights in paid
accommodations in 2020



JOBS SUPPORTED

The total economic impact of
tourism in the Kennebec Valley
region supported

5,600

jobs in 2020



WAGES GENERATED

Tourism in the Kennebec Valley region
supported

\$173,694,500

in wages and salaries in 2020



VISITORS CREATE JOBS

A Kennebec Valley region job is supported by every

112

visitors

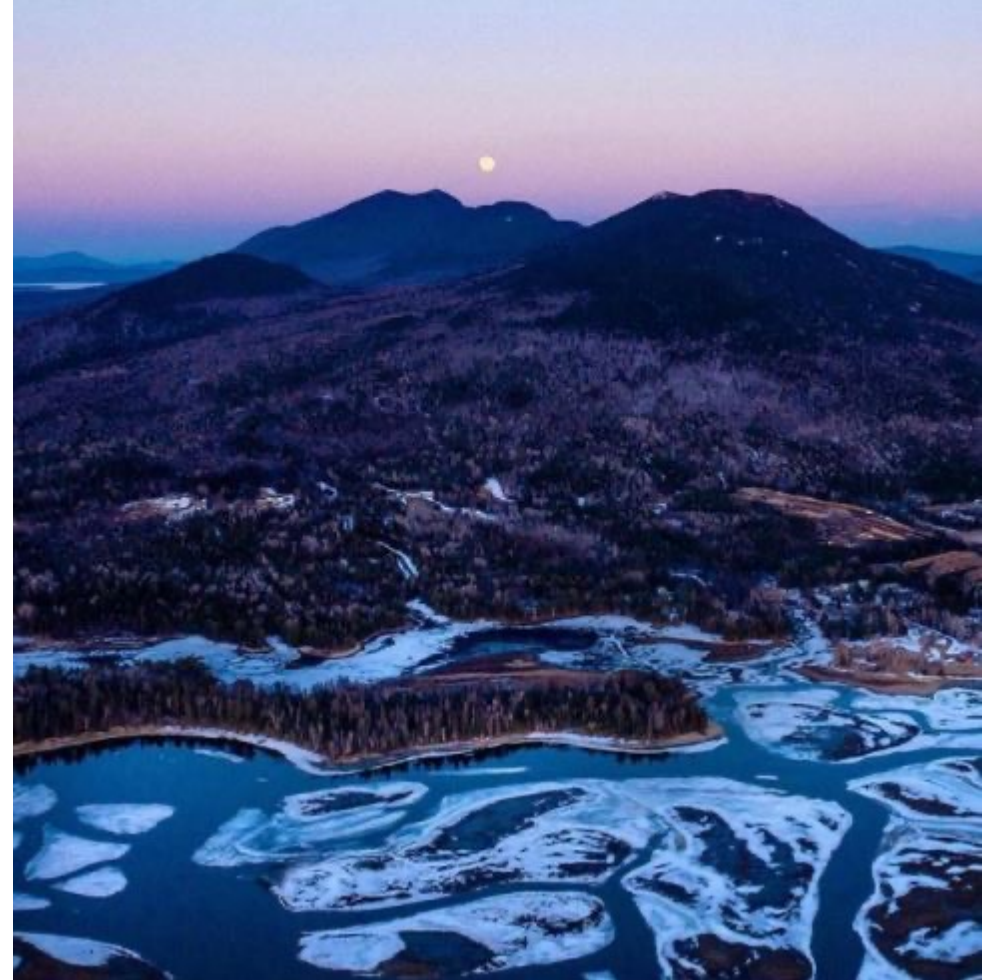


HOUSEHOLD SAVINGS

Visitors to the Kennebec Valley
region saved local residents

\$685

in taxes per household in 2020



LODGING METRICS

<i>Lodging Metrics¹</i>	<i>2020</i>
<i>Occupancy (%)</i>	<i>38.0%</i>
<i>Average Daily Rate</i>	<i>\$127.07</i>
<i>Revenue per Available Room</i>	<i>\$48.29</i>
<i>Total Accommodations Revenue</i>	<i>\$58,806,200</i>

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » **Half** of visitors started planning their trip to the Kennebec Valley region less than a month in advance
- » **3 in 5** visitors booked their trip/decided to visit the Kennebec Valley region less than a month in advance



TOP ONLINE TRIP PLANNING SOURCES*



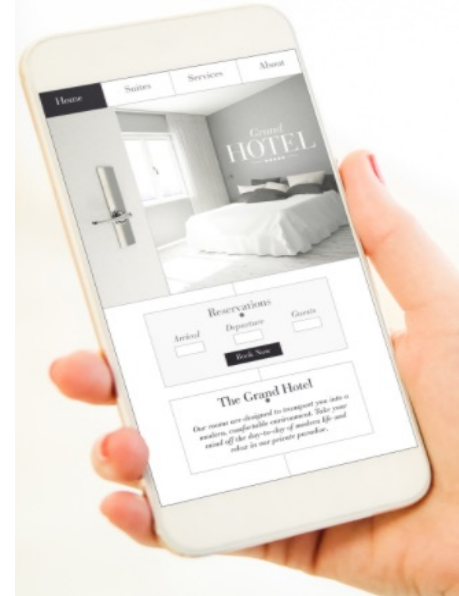
25% Online search engines



17% Facebook



13% TripAdvisor



13% Hotel websites



13% Online travel agency

TOP OTHER TRIP PLANNING SOURCES*



39% Advice from friends/family



13% Travel guides/brochures



12% Travel books & magazines

*Multiple responses permitted.

TOP REASONS FOR VISITING*



31% Visiting friends/relatives



31% Vacation



27% Relax and unwind

*Up to three responses permitted.

CONSIDERING MAINE AS A DESTINATION

- » 3 in 5 visitors to the Kennebec Valley region did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip



PRE-TRIP EXPOSURE TO ADVERTISING

- » Half of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to the Kennebec Valley region



TOP SOURCES OF ADVERTISING EXPOSURE*



40% Social media



40% Internet



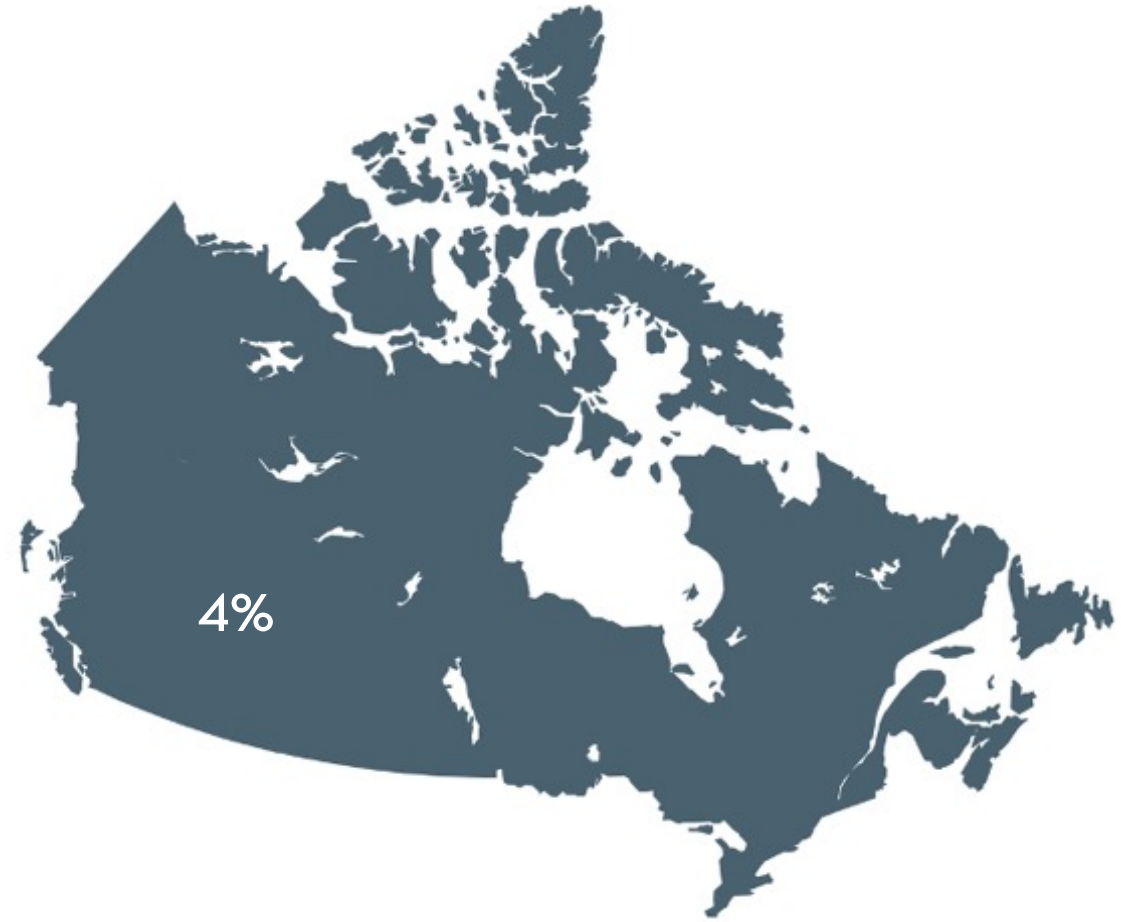
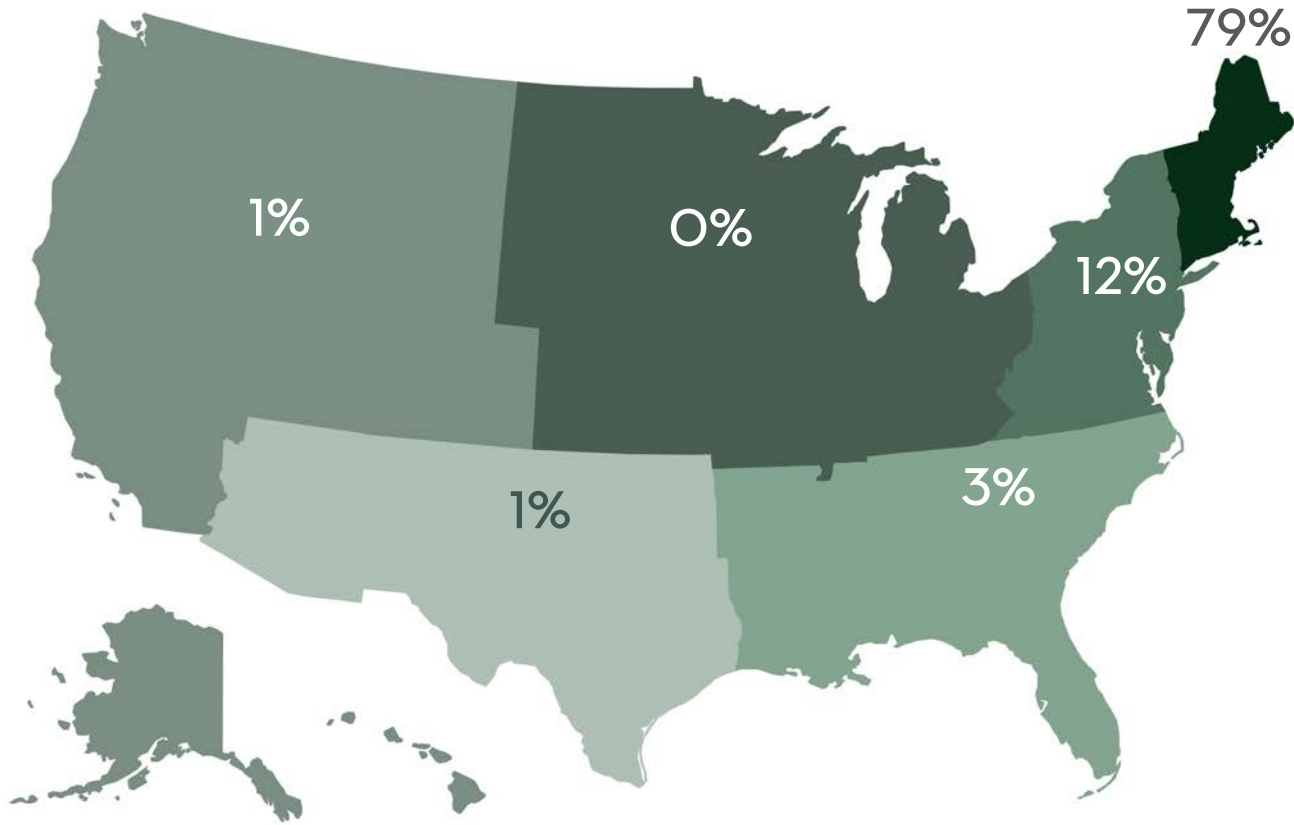
26% Cable or satellite television

*Multiple responses permitted.

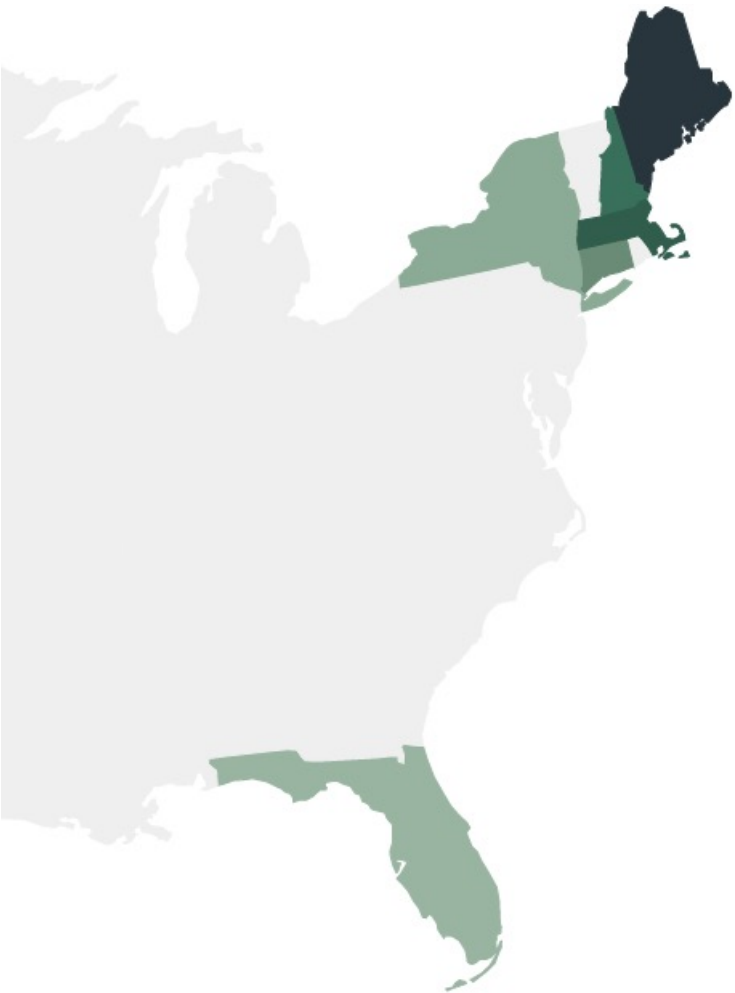
TRIP PLANNING CYCLE : TRAVELER PROFILE



REGIONS OF ORIGIN



TOP ORIGIN STATES & PROVINCES



78%

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



Maine (38%)

Massachusetts (14%)

New Hampshire (9%)



Connecticut (6%)

New York (6%)

Florida (5%)

TOP ORIGIN MARKETS



9% Boston, MA



6% New York City, NY



4% Washington D.C. -
Baltimore, MD

TRAVEL PARTIES

The typical visitor to the Kennebec Valley region traveled with **2.5** people in their visitor party



22% of visitors traveled with at least one person under the age of 18 in their travel party



VISITOR PROFILE



56% Female*



64% College/technical graduate



69% Married/domestic partnership



54% Employed full-time



86% White/Caucasian

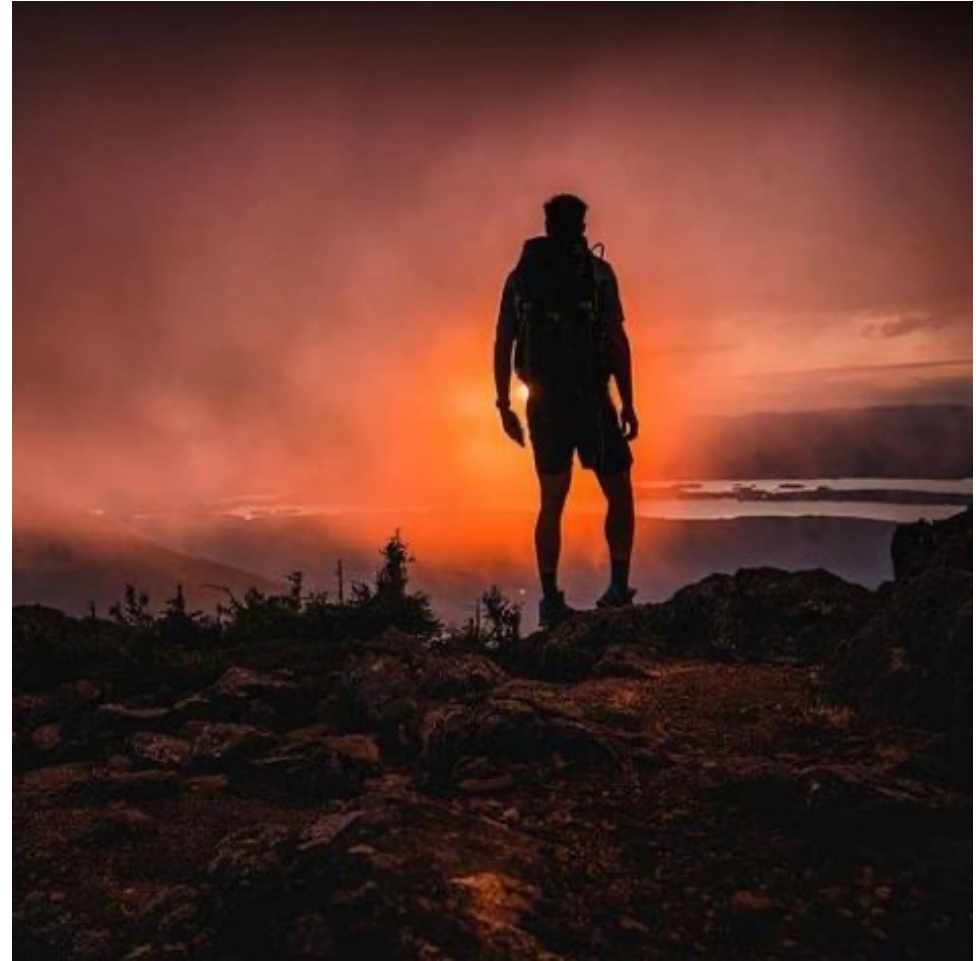


\$77,500 annual household income

*Of visitors interviewed

VISITOR PROFILE: DAY TRIPPERS

- » The typical day tripper¹:
 - » Earned **\$59,100** per year
 - » Was female (**61%**)
 - » Had at least a college/technical degree (**64%**)
 - » Was married or living with their partner (**64%**)
 - » Was employed full-time (**38%**)
 - » Was White/Caucasian (**83%**)
 - » **15%** traveled with children
 - » Was from Maine (**72%**) and other northeastern U.S. states (**23%**)



¹ Did not stay overnight in the Kennebec Valley region during their trip.

VISITOR PROFILE: OVERNIGHT VISITORS

- » The typical overnight visitor¹:
 - » Earned \$81,800 per year
 - » Was female (55%)
 - » Had a college/technical degree (67%)
 - » Was married or living with their partner (70%)
 - » Was employed full-time (56%)
 - » Was White/Caucasian (87%)
 - » 23% traveled with children
 - » Was from Maine (33%) and other northeastern U.S. states (45%)



¹ Stayed one or more nights in the Kennebec Valley region during their trip.

NEW & RETURNING VISITORS

- » 15% of visitors to the Kennebec Valley region were traveling in Maine for the first time
- » 35% of visitors to the Kennebec Valley region had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » 92% of visitors drove to the Kennebec Valley region



NIGHTS STAYED

- » 70% of visitors to the Kennebec Valley region spent one or more nights
- » Typical visitors to the Kennebec Valley region stayed 6.3 nights



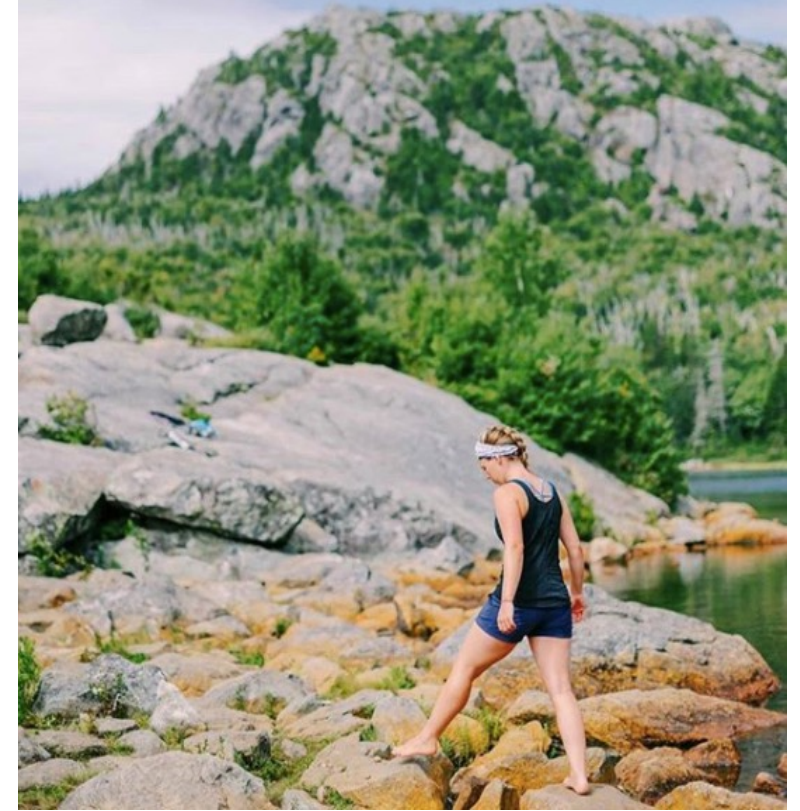
TOP ACCOMMODATIONS



21% Hotel/motel/resort



15% Friends/family home



30% Did not stay overnight

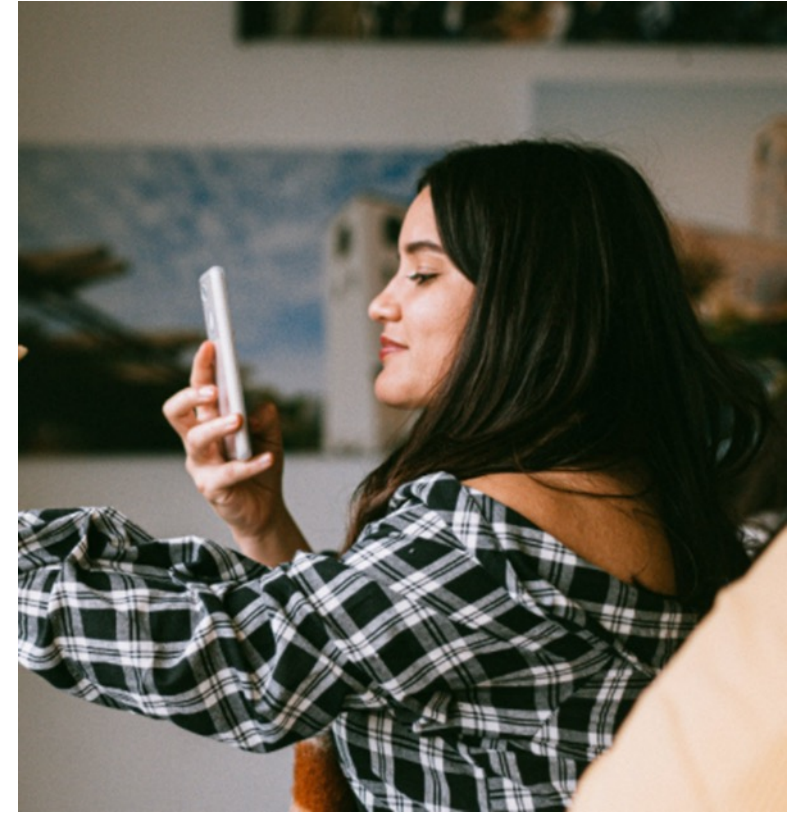
TOP IN-MARKET VISITOR RESOURCES*



37% Navigation websites/apps



22% Restaurant website/app



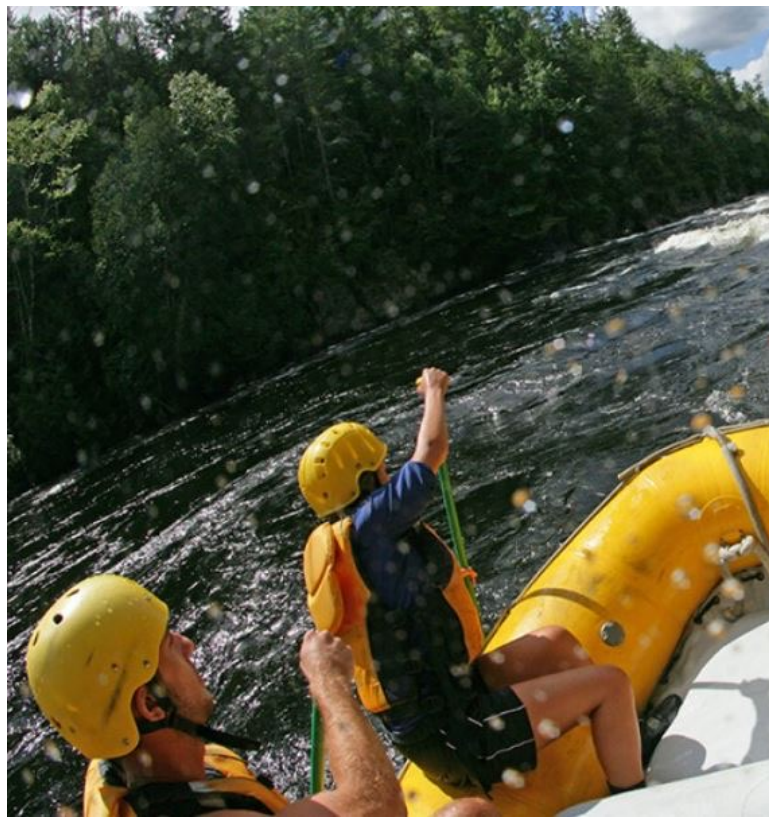
17% Personal social media

*Multiple responses permitted.

VISITOR ACTIVITIES*



61% Food/beverage/culinary



50% Active outdoor activities



46% Touring/sightseeing

*Multiple responses permitted.

VISITING OTHER STATES & PROVINCES

- » 2 in 3 visitors did not visit any other U.S. state or Canadian province on their trip to the Kennebec Valley region
- » Visitors to the Kennebec Valley region were **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE

- » 83% of visitors traveled to regions other than the Kennebec Valley region during their trip to Maine
- » 1 in 3 visitors to the Kennebec Valley region also visited Greater Portland & Casco Bay during their trip



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » 96% of visitors to the Kennebec Valley region would recommend Maine to a friend or relative as a vacation destination
- » 95% of visitors would recommend the Kennebec Valley region as a place to visit or vacation



LIKELIHOOD OF RETURNING TO MAINE

» 97% of visitors to the Kennebec Valley region 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>627,700</i>
<i>Room nights generated</i>	<i>462,800</i>
<i>Direct expenditures</i>	<i>\$321,334,700</i>
<i>Total economic impact</i>	<i>\$501,282,100</i>

IMPACT OF TOURISM

<i>Maine Jobs</i>	<i>2020</i>
<i>Jobs generated (direct)</i>	<i>4,300</i>
<i>Total impact of tourism on Maine jobs</i>	<i>5,600</i>

<i>Maine Wages</i>	<i>2020</i>
<i>Wages paid (direct)</i>	<i>\$118,276,100</i>
<i>Total impact of tourism on Maine wages</i>	<i>\$173,694,500</i>

IMPACT OF TOURISM

<i>Return on Investment</i>	<i>2020</i>
<i>Visitors per job supported</i>	<i>112</i>
<i>State & local taxes supported</i>	<i>\$50,292,800</i>
<i>Tax savings per household</i>	<i>\$685</i>

LODGING METRICS

<i>Lodging Metrics¹</i>	<i>2020</i>
<i>Occupancy (%)</i>	<i>38.0%</i>
<i>Average Daily Rate</i>	<i>\$127.07</i>
<i>Revenue per Available Room</i>	<i>\$48.29</i>
<i>Total Accommodations Revenue</i>	<i>\$58,806,200</i>

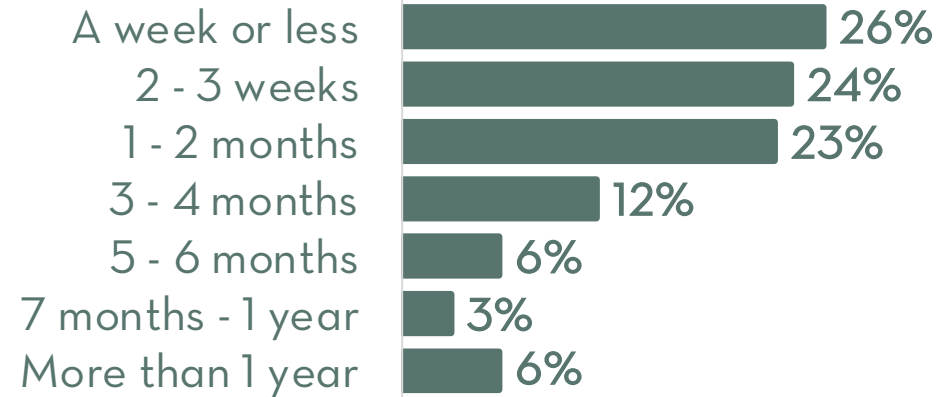
TRIP PLANNING CYCLE : PRE-VISIT



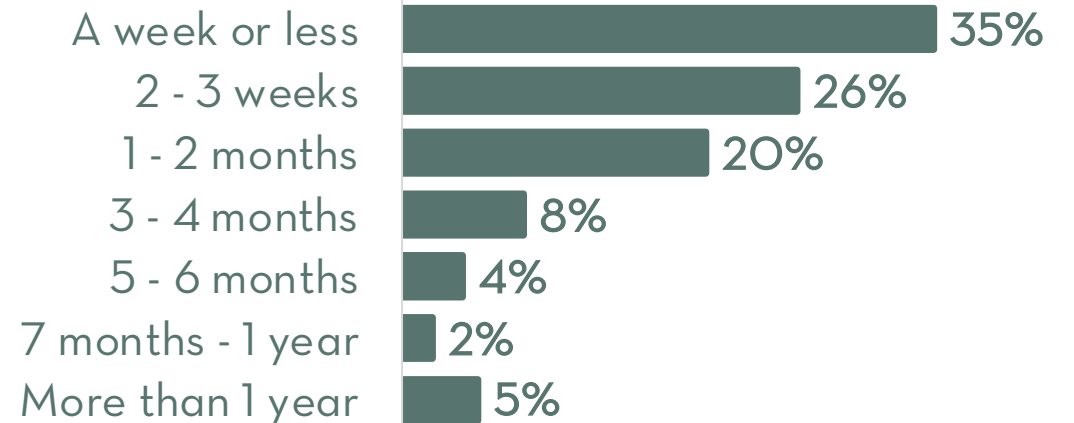
TRIP PLANNING CYCLE

- » Half of visitors to the Kennebec Valley region started planning their trip within a month of their trip
- » Very few visitors (15%) have planning windows longer than 4 months
- » 3 in 5 visitors have a booking window of less than 1 month
- » Very few visitors (11%) booked accommodations 5+ months in advance

Beginning of Trip Planning Cycle

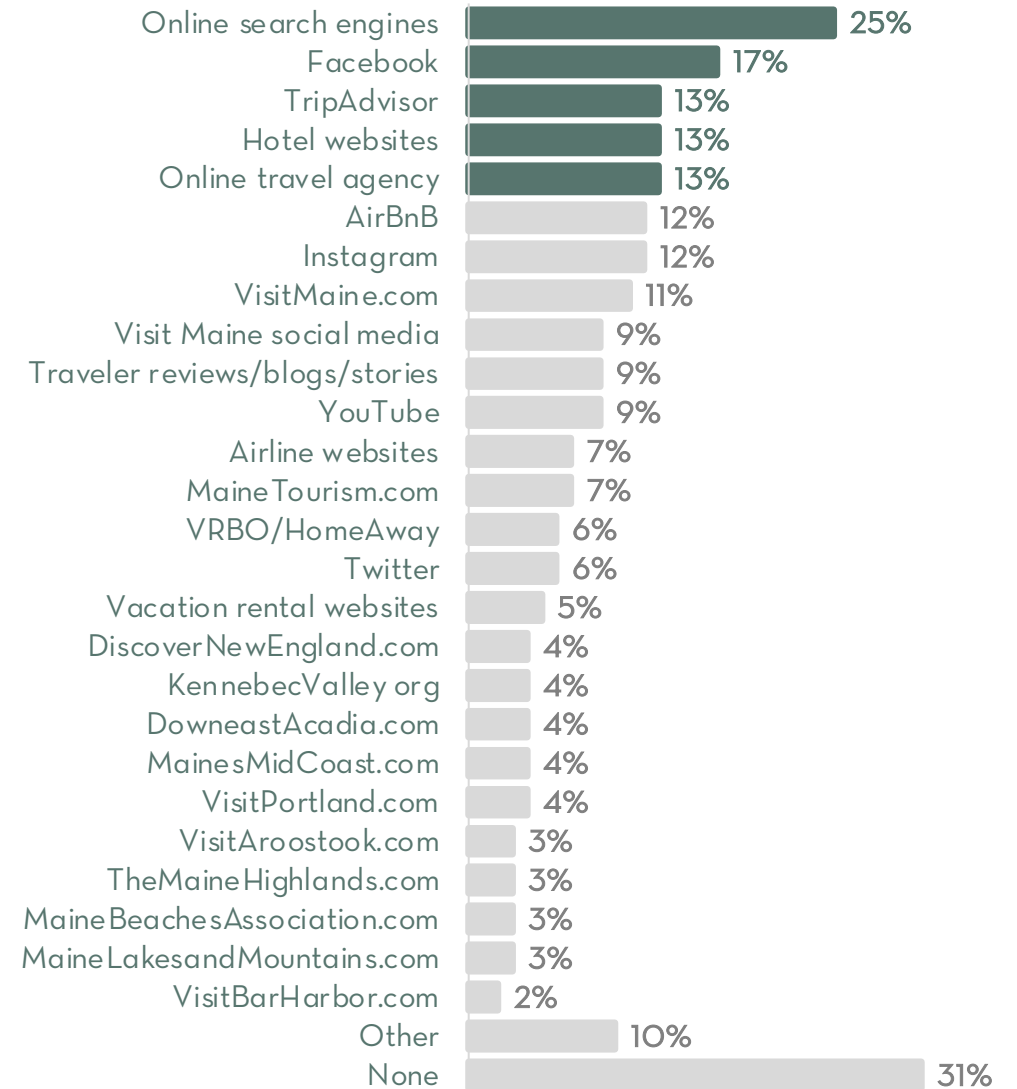


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

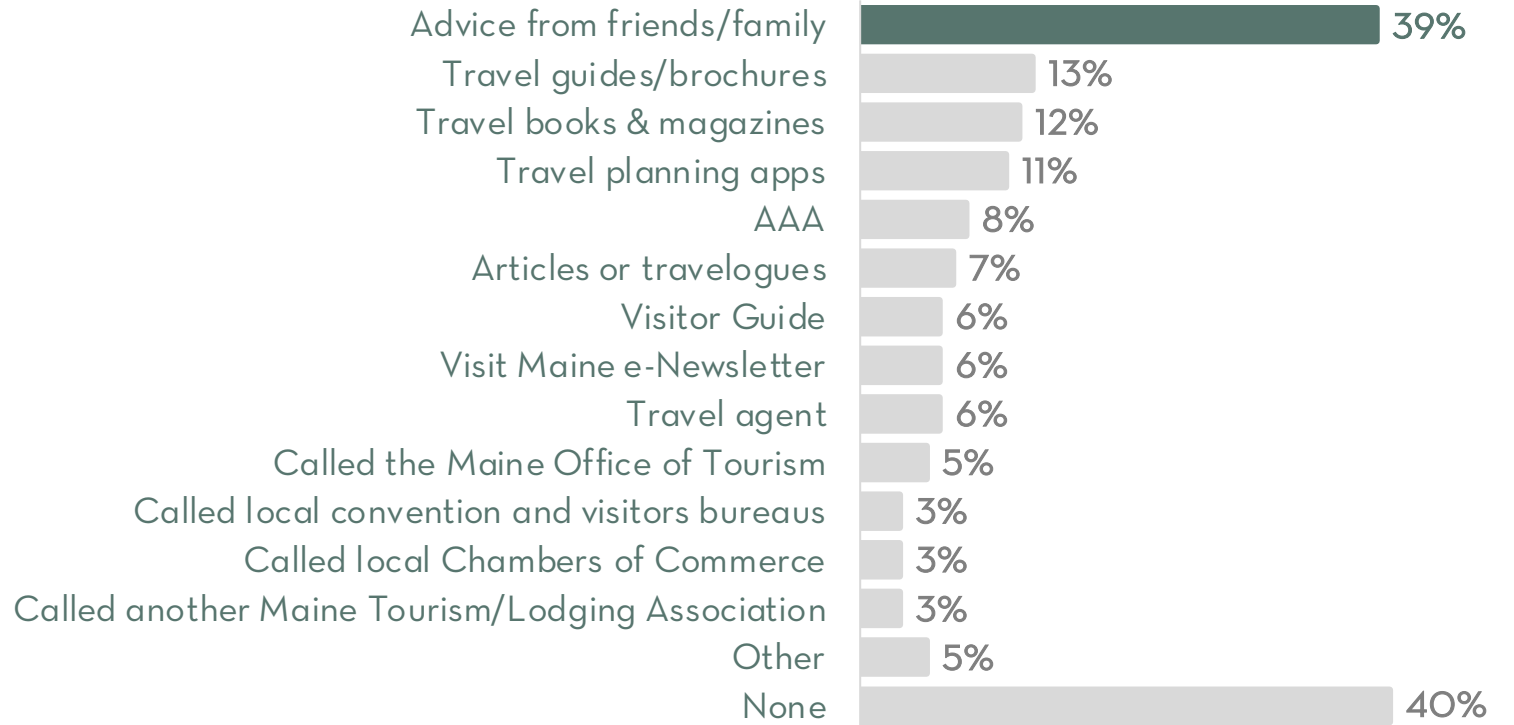
- » Over **7 in 10** visitors used one or more online resources to help them plan their trip to Kennebec Valley
- » **1 in 4** visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » **1 in 10** visitors to Kennebec Valley used VisitMaine.com, and **7%** used MaineTourism.com



*Multiple responses permitted.

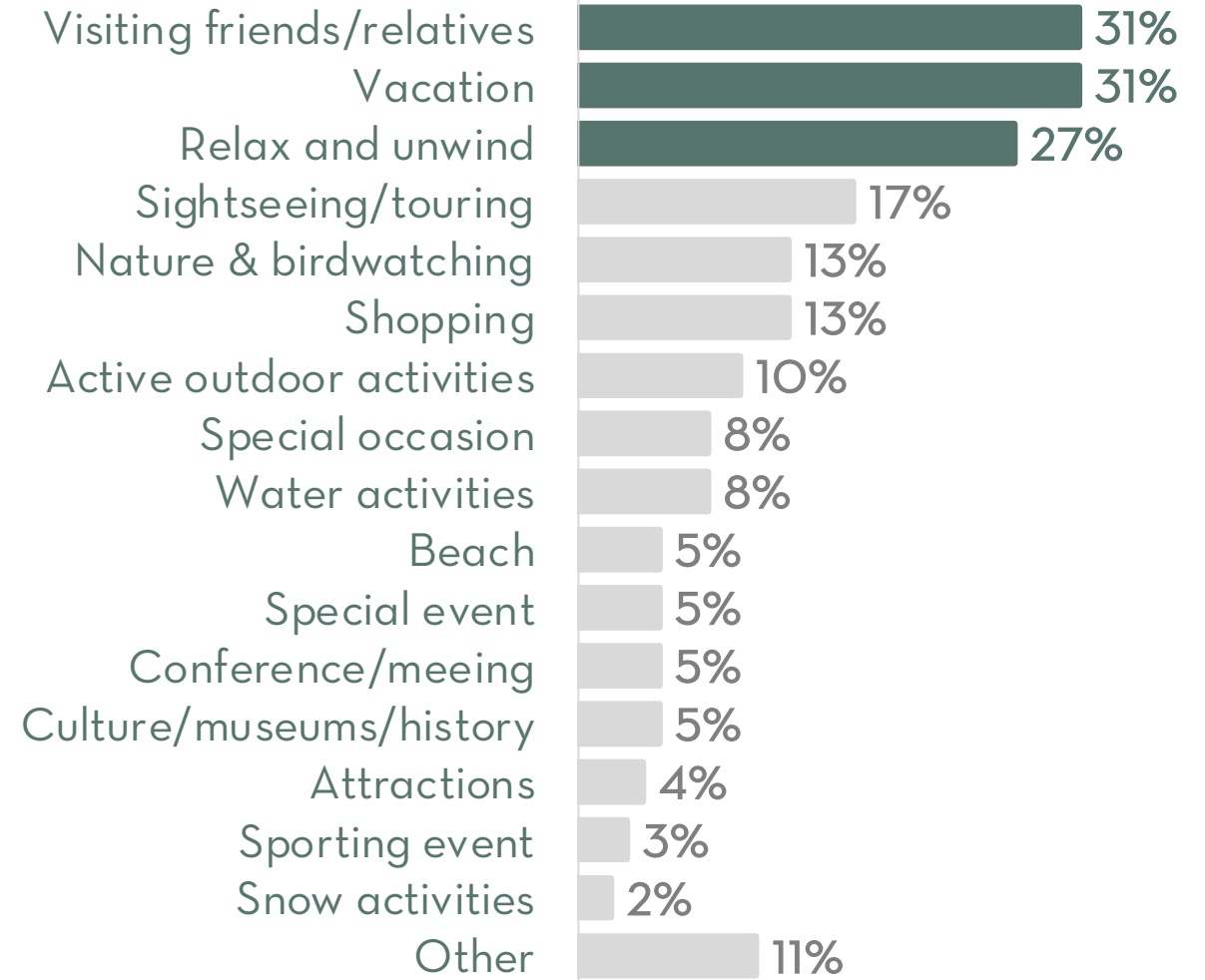
OTHER TRIP PLANNING SOURCES*

- » **2 in 5** visitors relied on advice from their friends and family to help them plan their trip to the Kennebec Valley region
- » **2 in 5** visitors did not use any other resources to help them plan their trip to the Kennebec Valley region



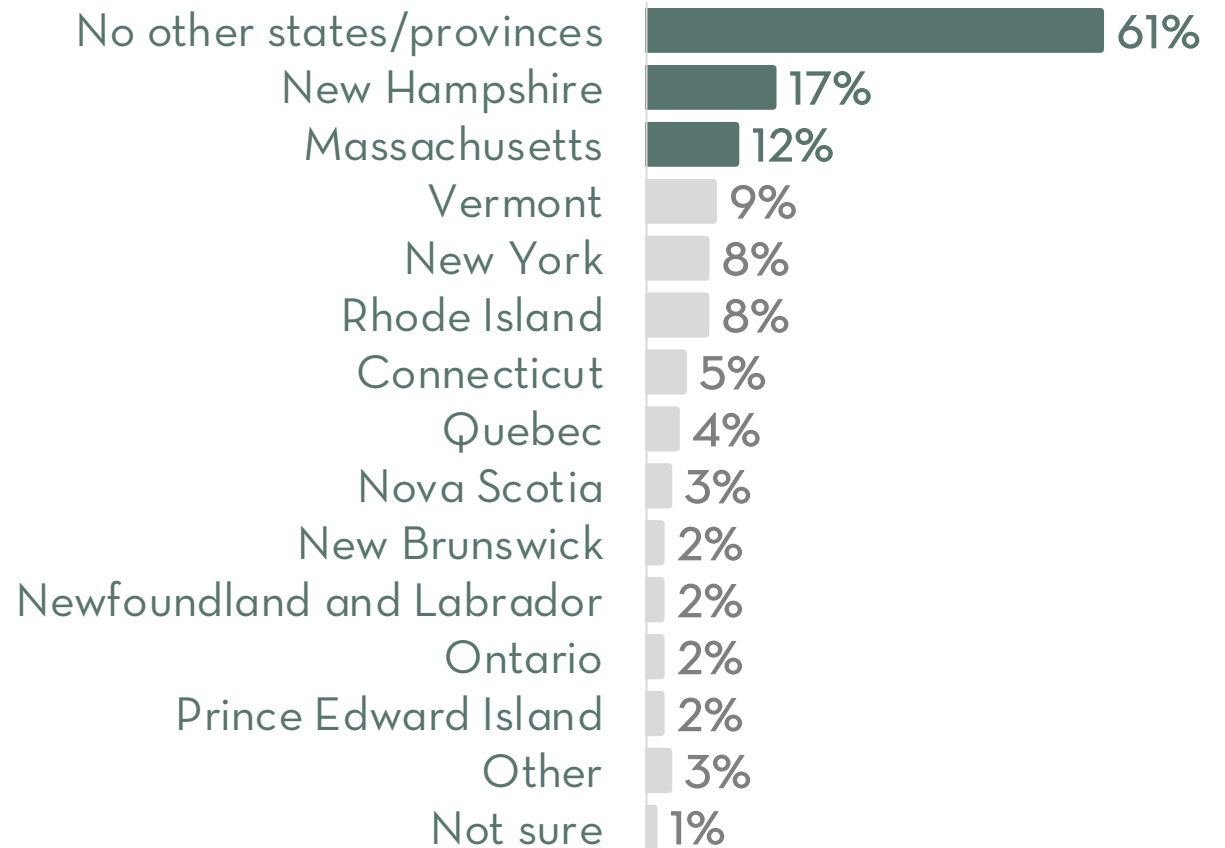
REASONS FOR VISITING*

- » **3 in 10** visitors primarily traveled to the Kennebec Valley region to visit friends/relatives or to take a vacation
- » **27%** of visitors came to the Kennebec Valley region to relax/unwind



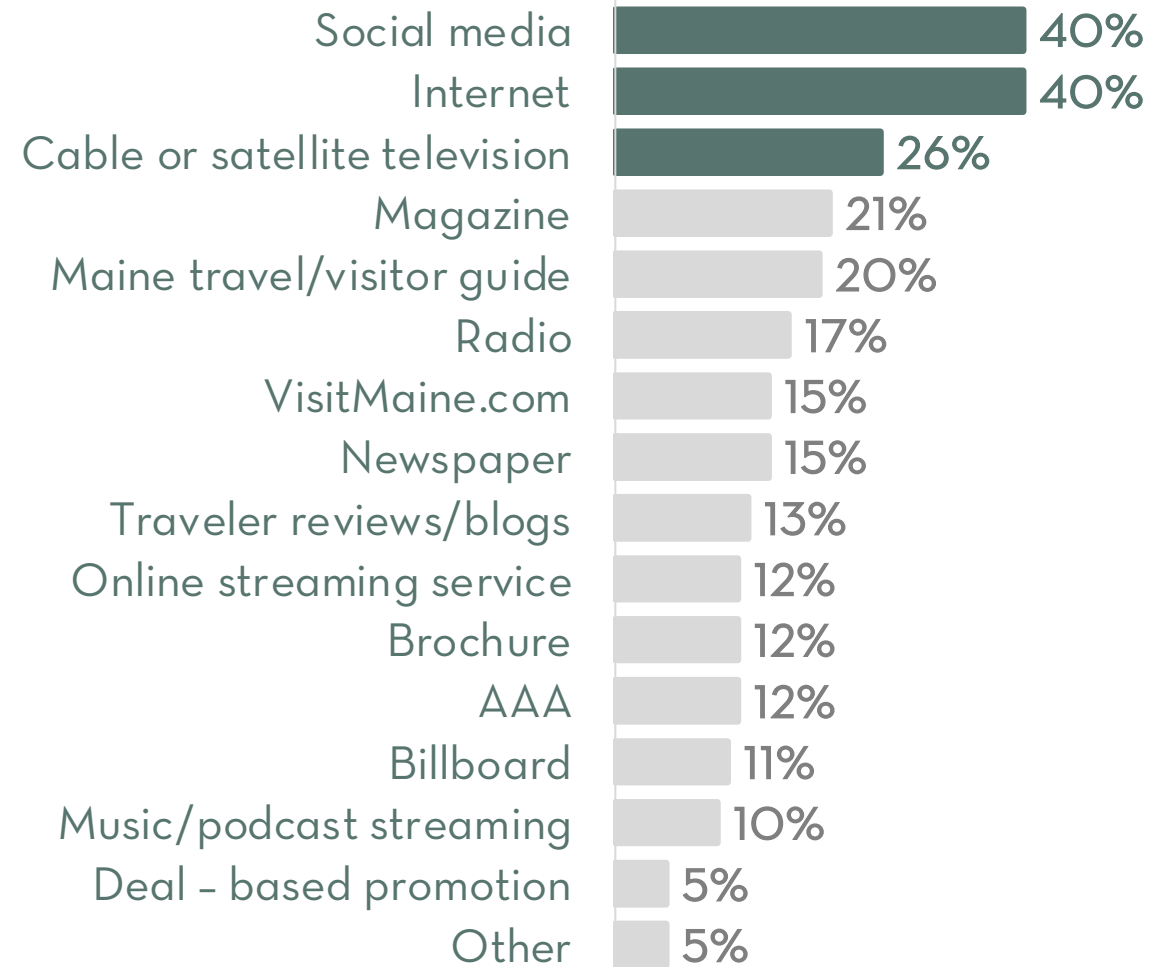
OTHER STATES & PROVINCES CONSIDERED*

- » 3 in 5 visitors considered visiting **ONLY** Maine while planning their trip to the Kennebec Valley region
- » Visitors to Kennebec Valley were **more likely** to consider visiting nearby U.S. states rather than visiting a Canadian province



PRE-TRIP EXPOSURE TO ADVERTISING*

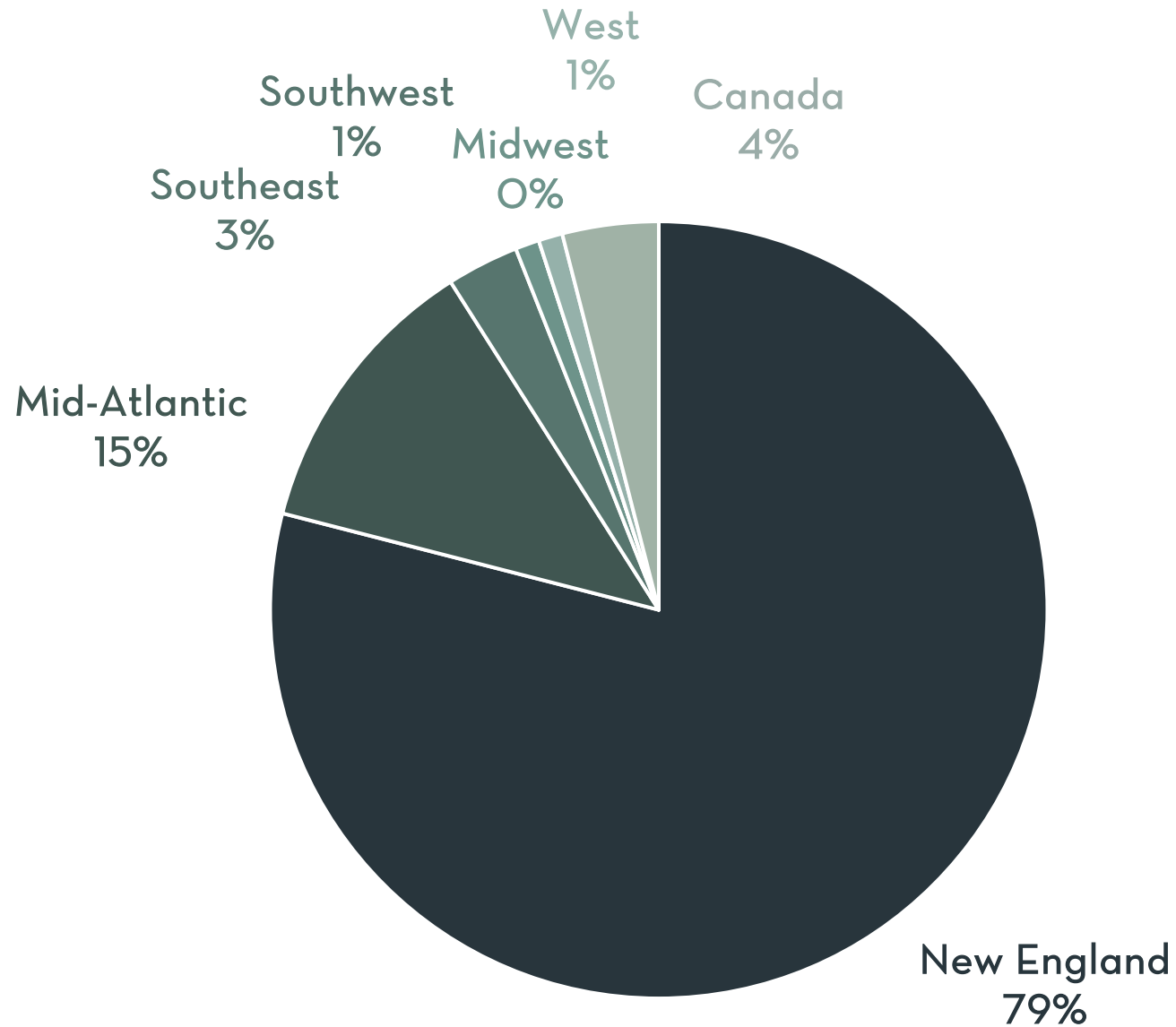
- » 49% of visitors noticed advertising or promotions for Maine prior to their trip to the Kennebec Valley region
- » Visitors who were exposed to this advertising primarily saw it on **social media**, the **internet**, or on **television**
- » Visitors were more likely to notice Maine promotions on **digital** media rather than on **traditional** media



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **3 in 5** visitors to Kennebec Valley were from Maine, Massachusetts, or New Hampshire
- » **9 in 10** visitors came from **10** U.S. states
- » **38%** of visitors to Kennebec Valley were traveling from other cities/towns in Maine

State/Country	Percent
Maine	38%
Massachusetts	14%
New Hampshire	9%
Connecticut	6%
New York	6%
Florida	5%
Washington D.C.	4%
Maryland	3%
New Jersey	3%
Pennsylvania	2%

TOP ORIGIN MARKETS

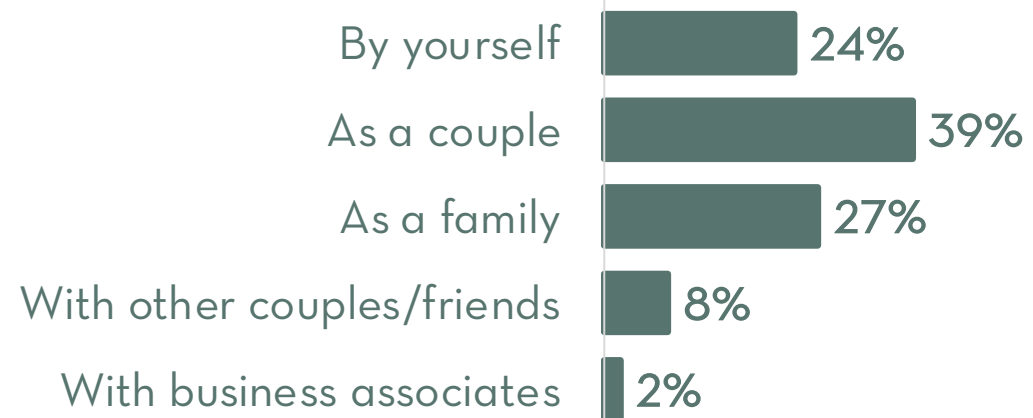
- » More visitors traveled to the Kennebec Valley region from **Boston** than from any other market
- » **Over 1 in 4** visitors traveled from **7** markets in Maine and other U.S. states

Market	Percent
Boston, MA	9%
New York City, NY	6%
Washington D.C. - Baltimore, MD	4%
Miami - Ft. Lauderdale, FL	2%
Philadelphia, PA	2%
Bangor, ME	2%
Portland, ME	2%

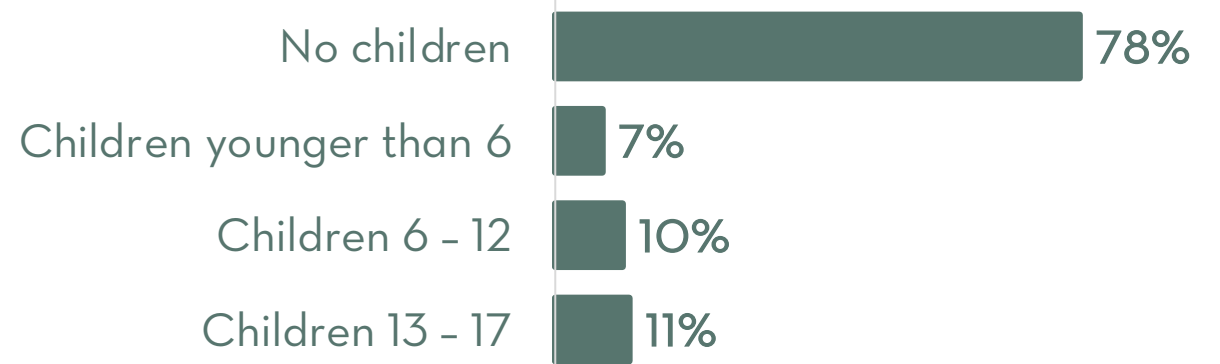
TRAVEL PARTIES

- » Typical visitors traveled in the Kennebec Valley region with a party of **2.5** people
- » **2 in 5** visitors traveled as a couple
- » Only **22%** of visitors traveled in the Kennebec Valley region with one or more children in their travel party

Travel Party Composition



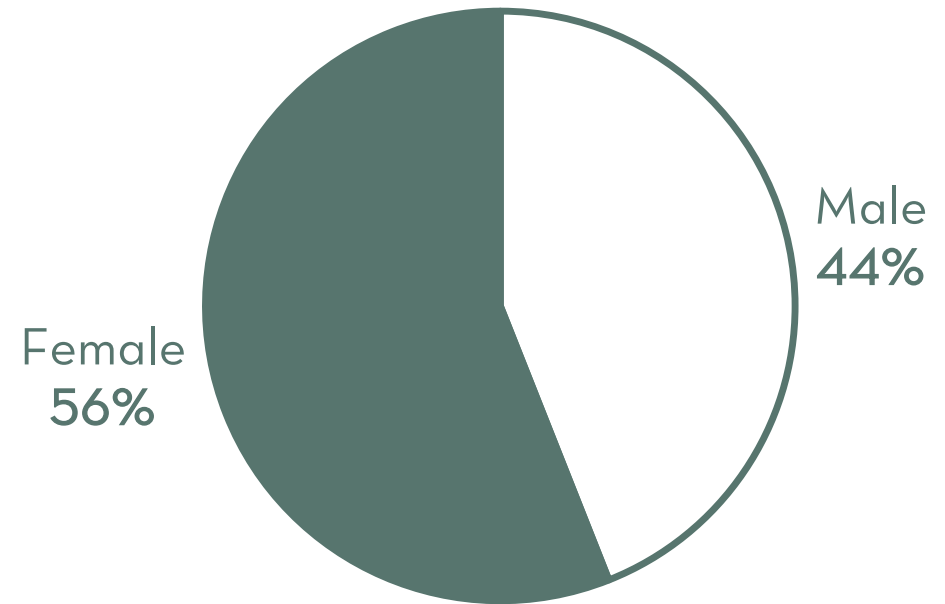
*Children in Travel Party**



*Multiple responses permitted.

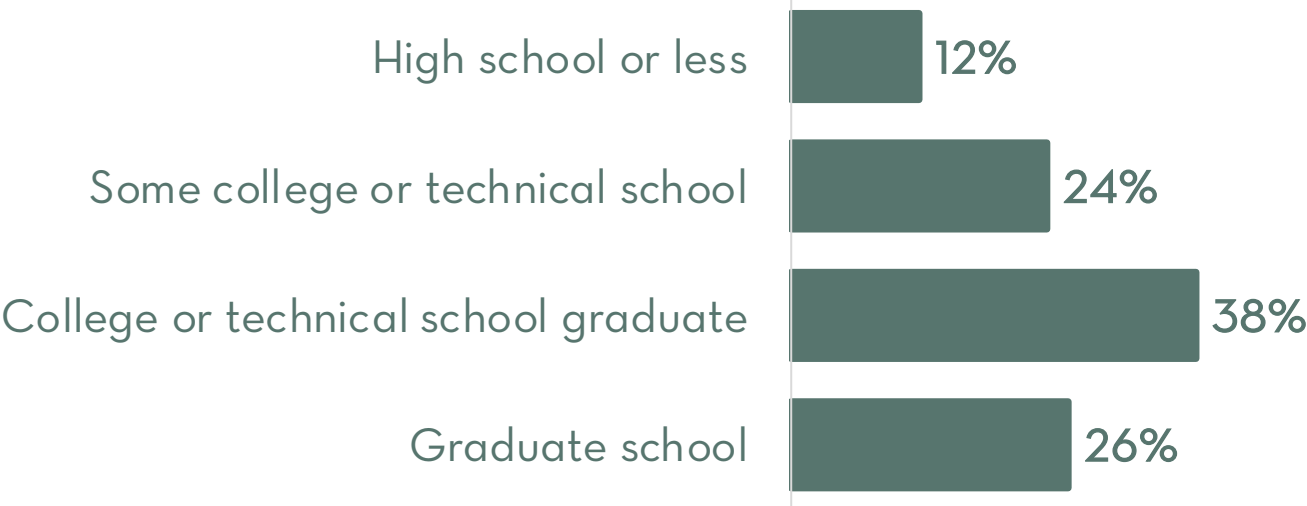
GENDER

» 56% of visitors to the Kennebec Valley region who were interviewed were female



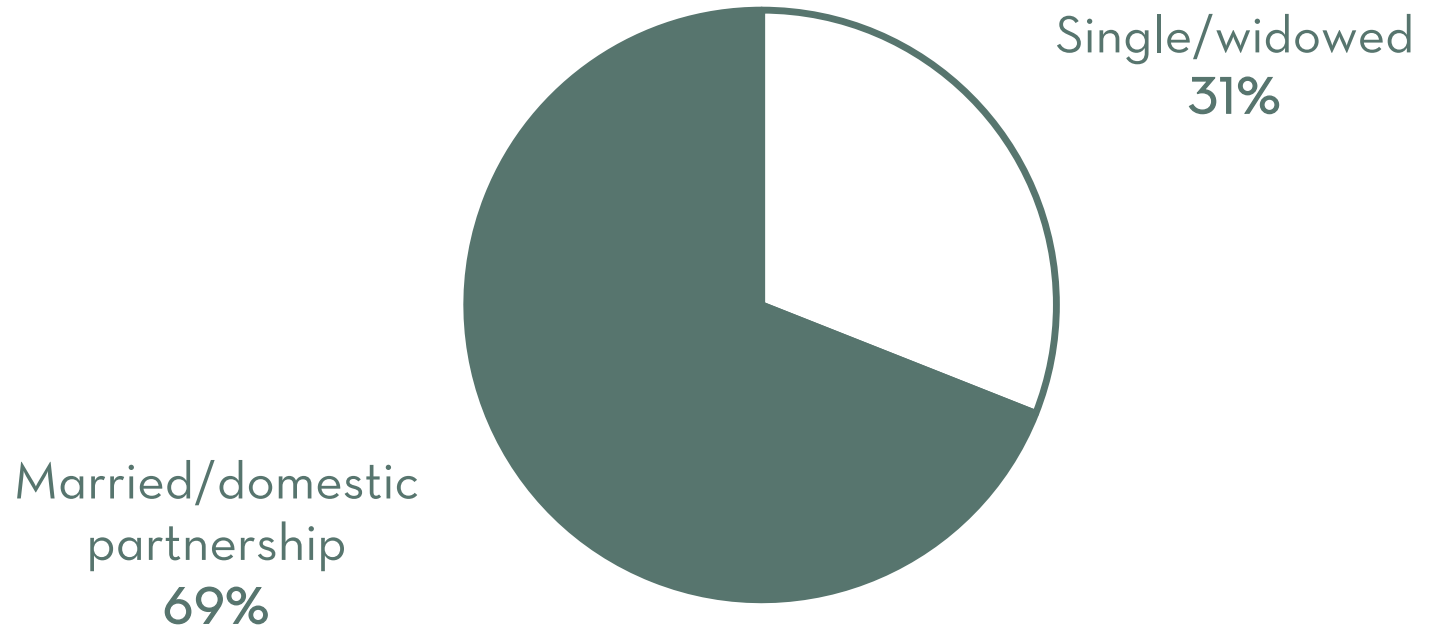
EDUCATIONAL ATTAINMENT

» Visitors to the Kennebec Valley region have substantial formal educations, with **64%** having a college or technical school degree, and **1 in 4** possessing a graduate degree



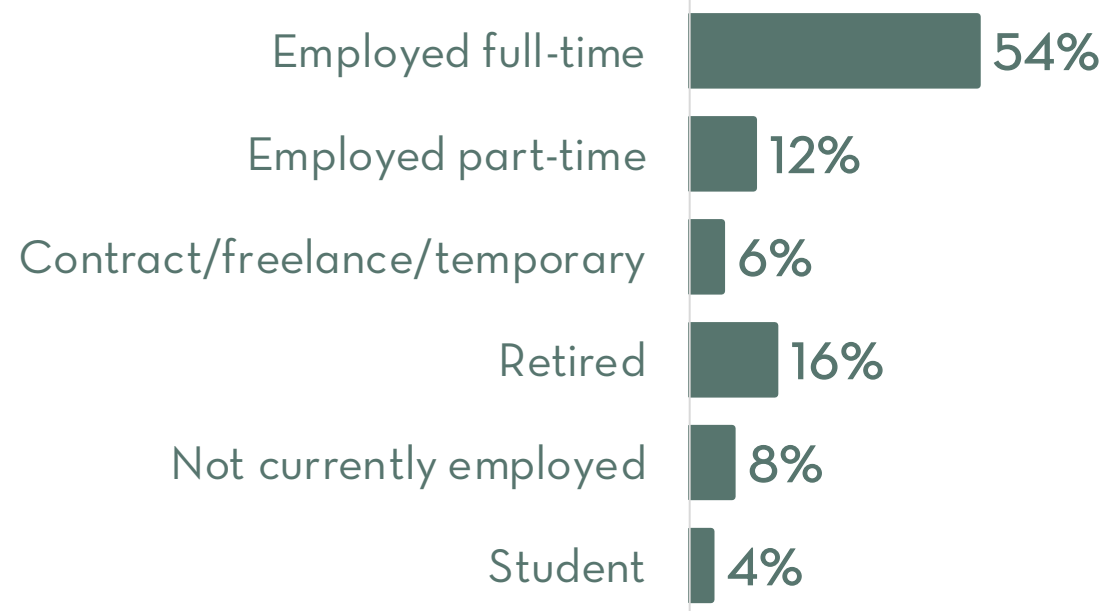
MARITAL STATUS

» 7 in 10 visitors to the Kennebec Valley region were married or living with their partner



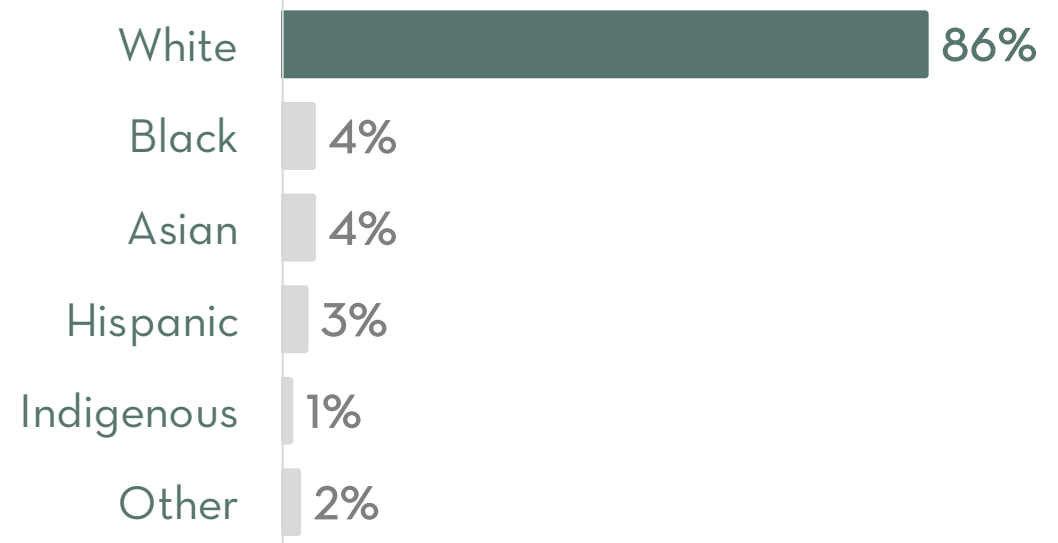
EMPLOYMENT STATUS

» 72% of visitors to the Kennebec Valley region were employed, most full-time



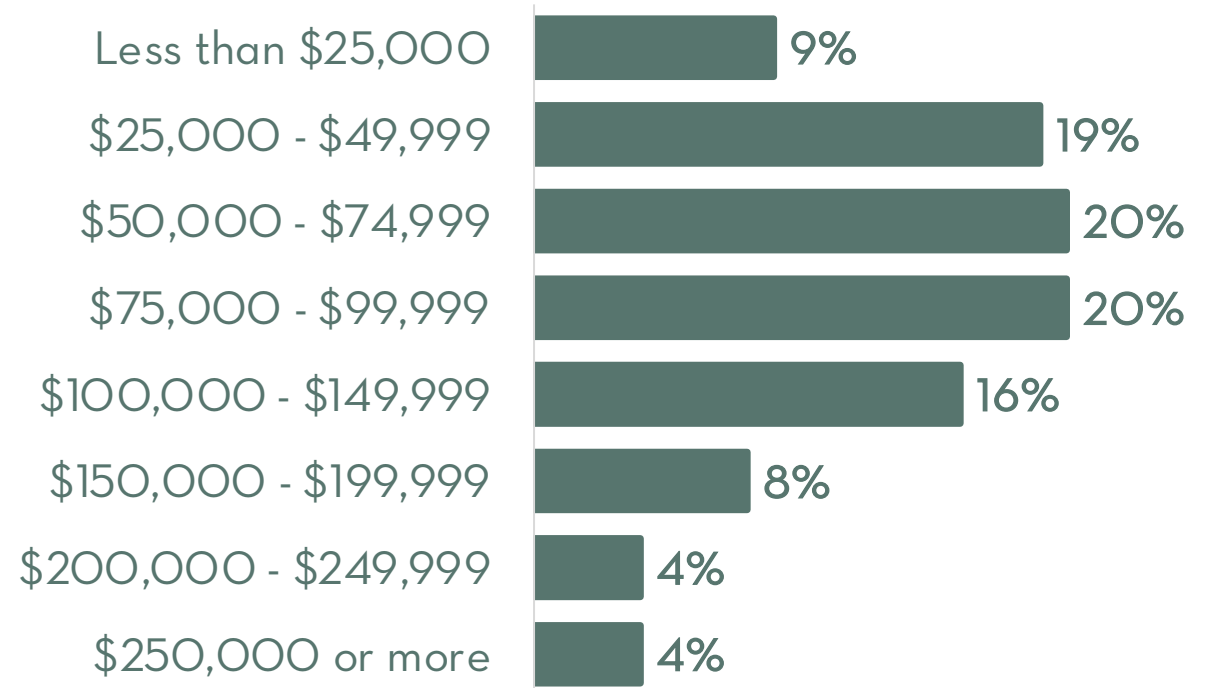
RACE & ETHNICITY

» 86% of visitors to the Kennebec Valley region were White/Caucasian



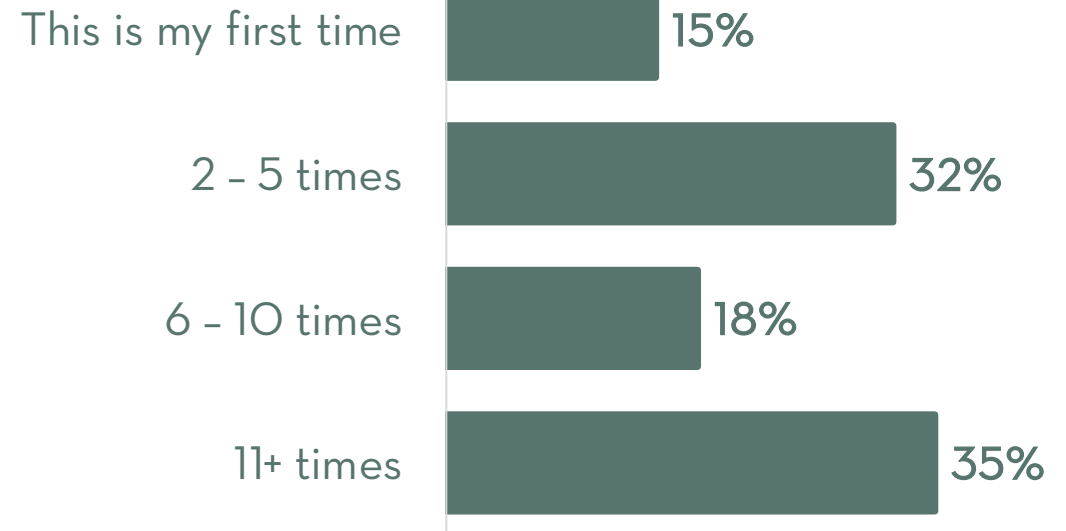
HOUSEHOLD INCOME

- » Typical visitors to the Kennebec Valley region earned **\$77,500** per year in household income
- » **16%** of visitors to the Kennebec Valley region have household incomes that exceed \$150,000



NEW & RETURNING VISITORS

- » **15%** of visitors to the Kennebec Valley region were traveling in Maine for the first time
- » **35%** of visitors to the Kennebec Valley region had previously traveled in Maine more than 10 times

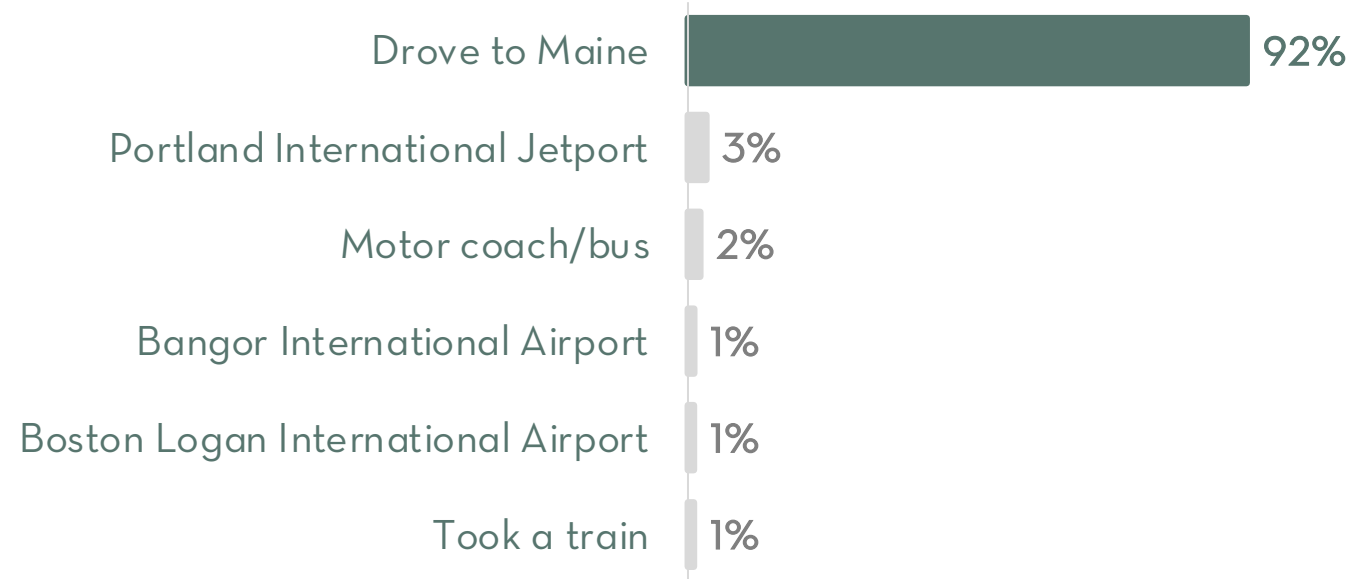


TRIP PLANNING CYCLE : TRIP EXPERIENCE



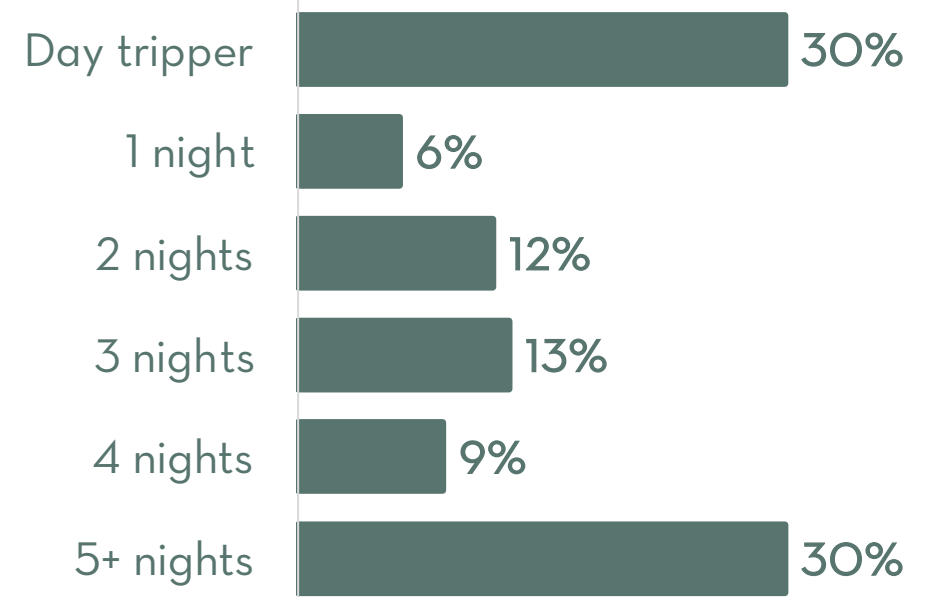
MODES OF TRANSPORTATION

- » The Kennebec Valley region 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



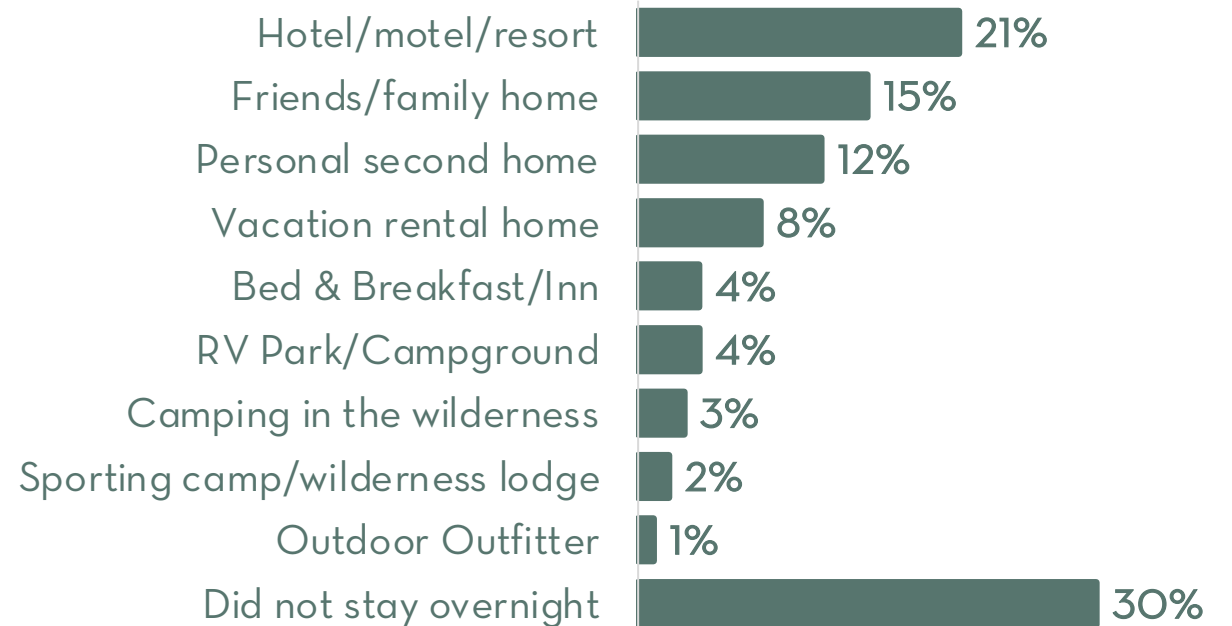
NIGHTS STAYED

- » 70% of visitors to the Kennebec Valley region stayed one night or more
- » Typical visitors to the Kennebec Valley region stayed 6.3 nights
- » 30% of visitors to the Kennebec Valley region stayed 5 or more nights



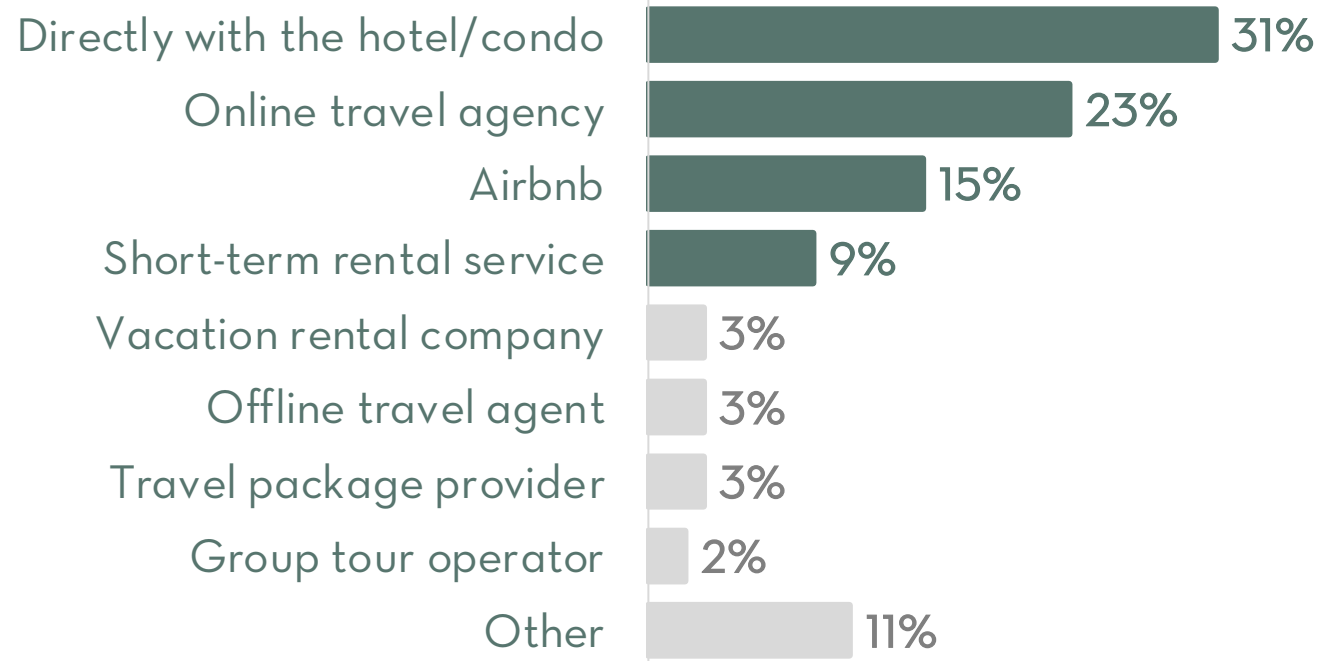
ACCOMMODATIONS

- » **21%** of visitors to the Kennebec Valley region stayed overnight in a hotel, motel, or resort
- » **15%** of visitors to the Kennebec Valley region stayed overnight with friends or relatives



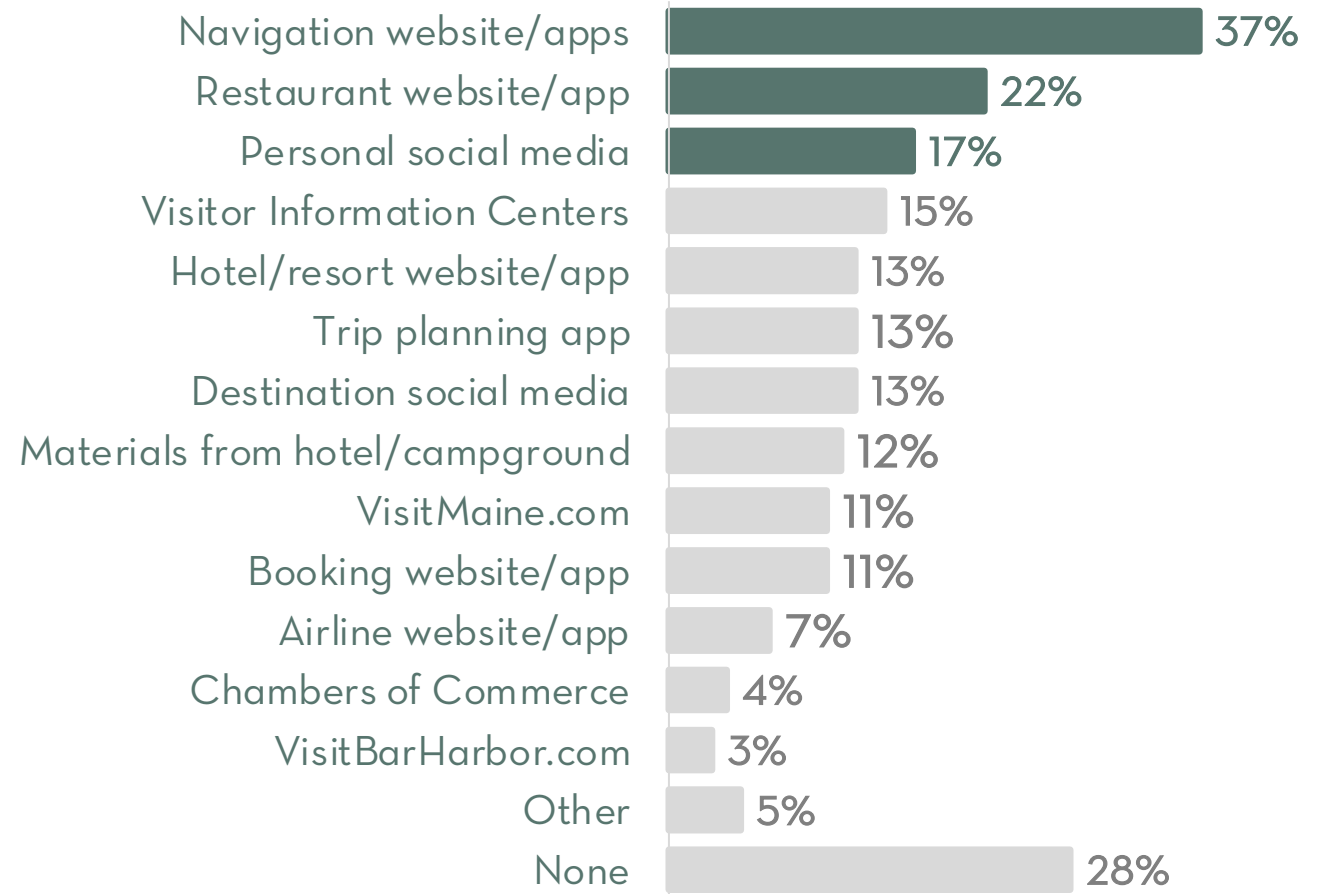
BOOKING METHODS

- » 43% of visitors to the Kennebec Valley region stayed overnight in paid accommodations during their trip
- » 3 in 10 visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



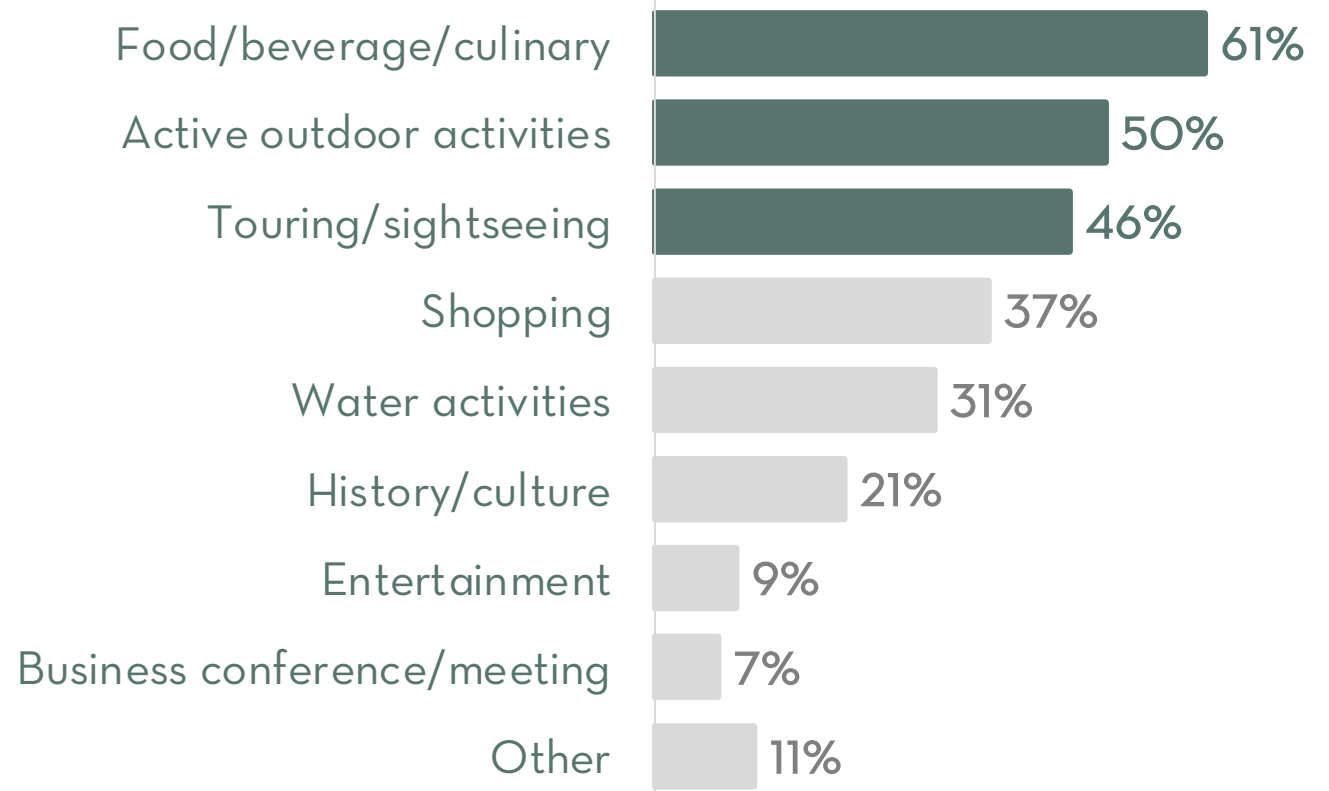
IN-MARKET VISITOR RESOURCES*

- » 37% of visitors used navigation websites and apps to plan activities during their trip to the Kennebec Valley region
- » 28% of visitors did not use any resources to plan activities while they were in the Kennebec Valley region

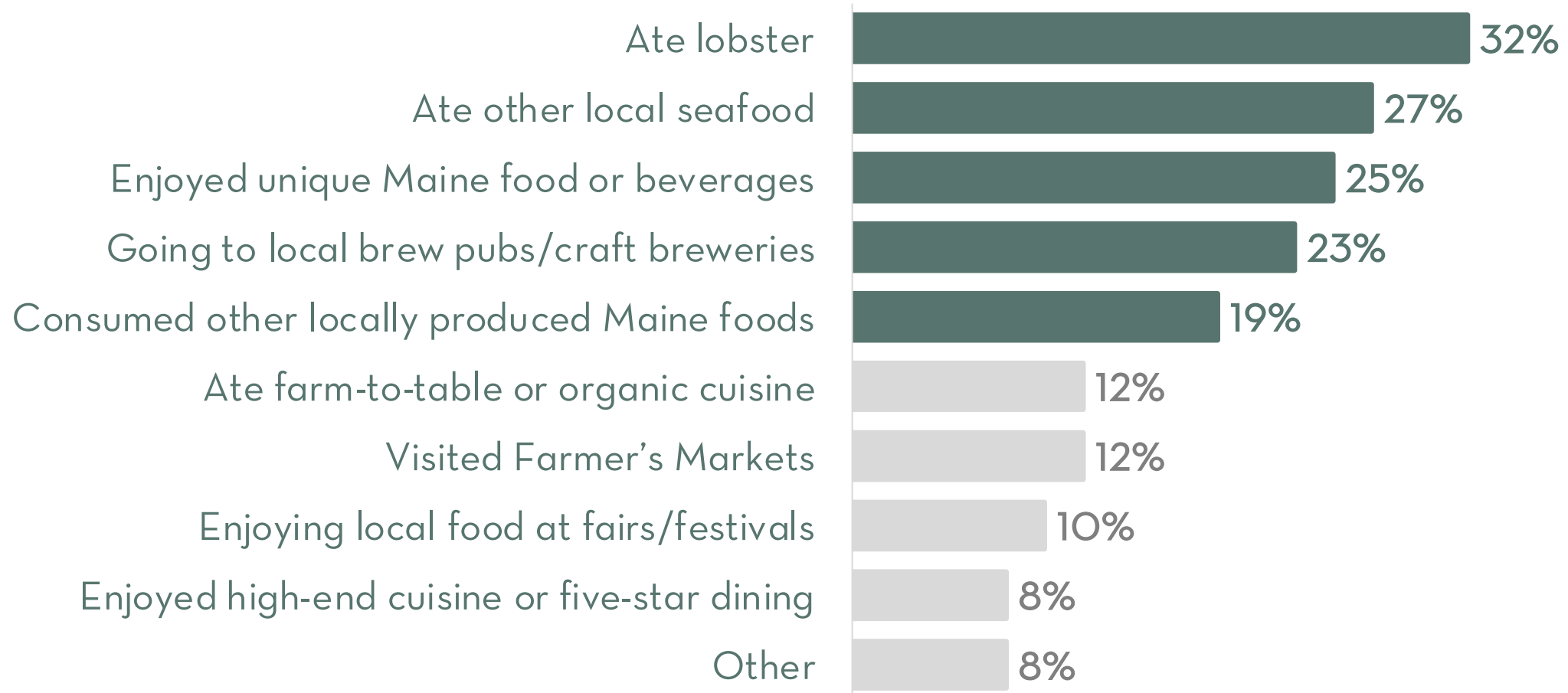


VISITOR ACTIVITIES*

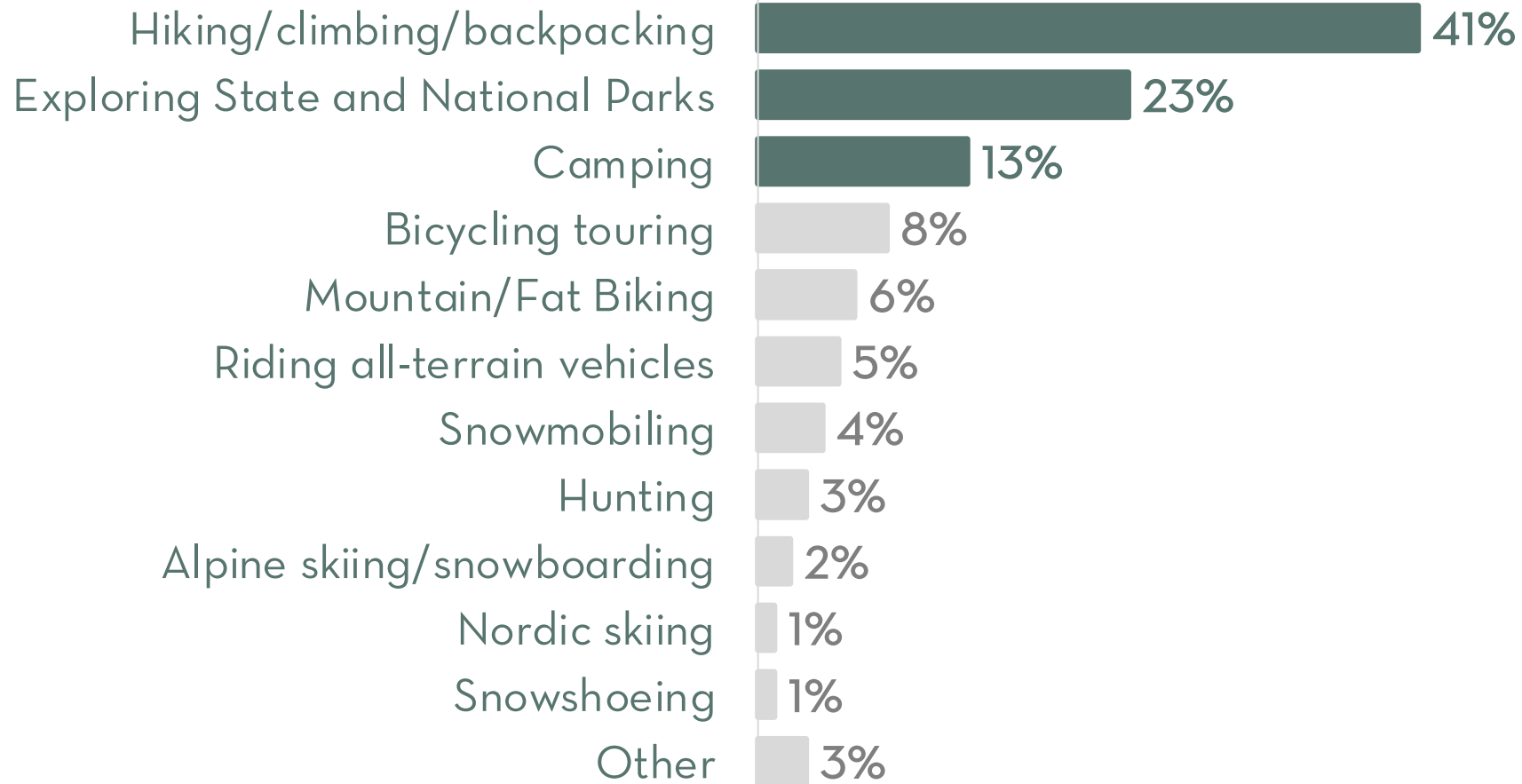
- » **3 in 5** visitors participated in food, beverage, and culinary activities during their trip in the Kennebec Valley region
- » **Half** of visitors to the Kennebec Valley region engaged active outdoor activities during their trip



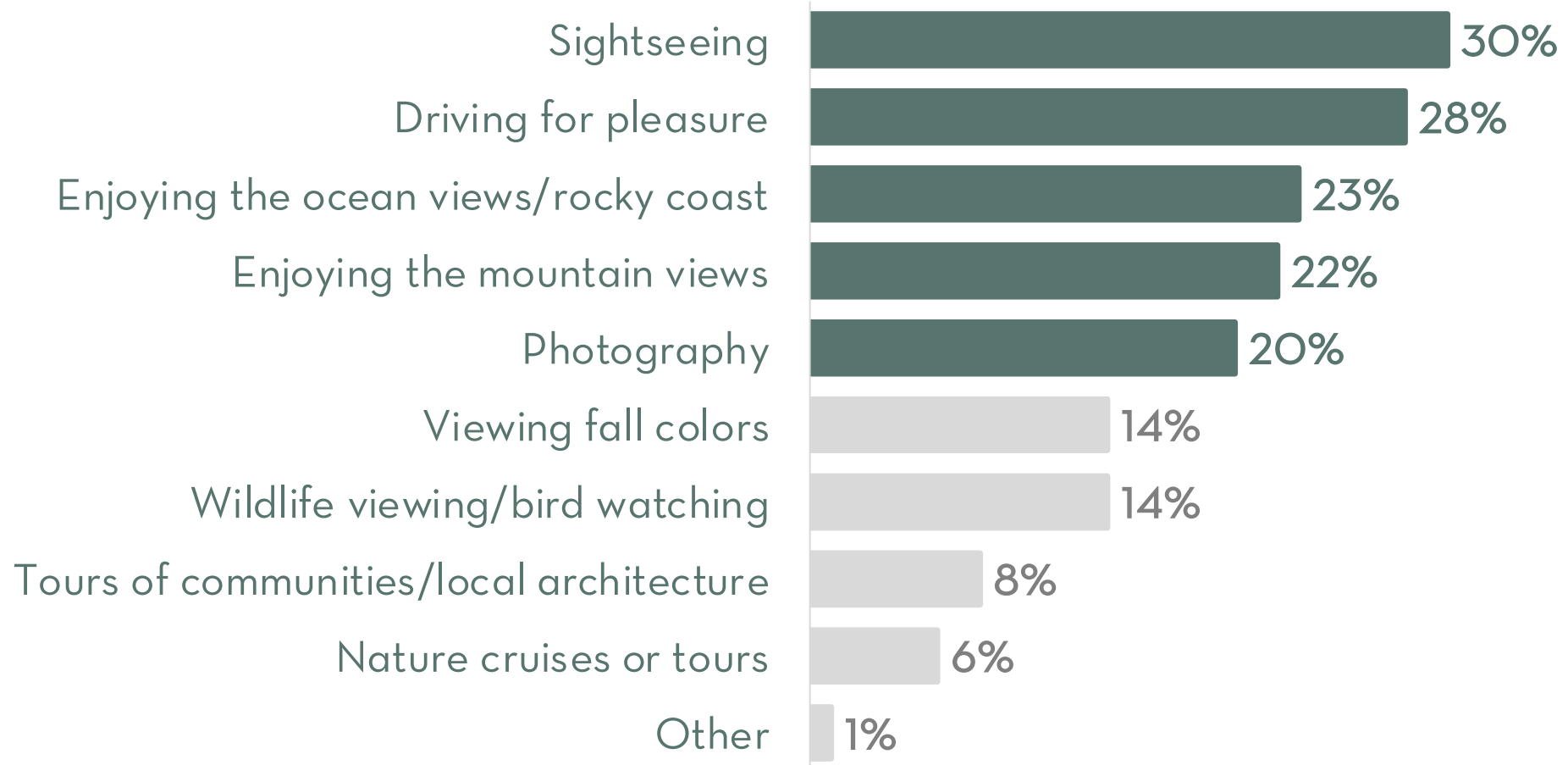
FOOD & BEVERAGE ACTIVITIES*



ACTIVE OUTDOOR ACTIVITIES*



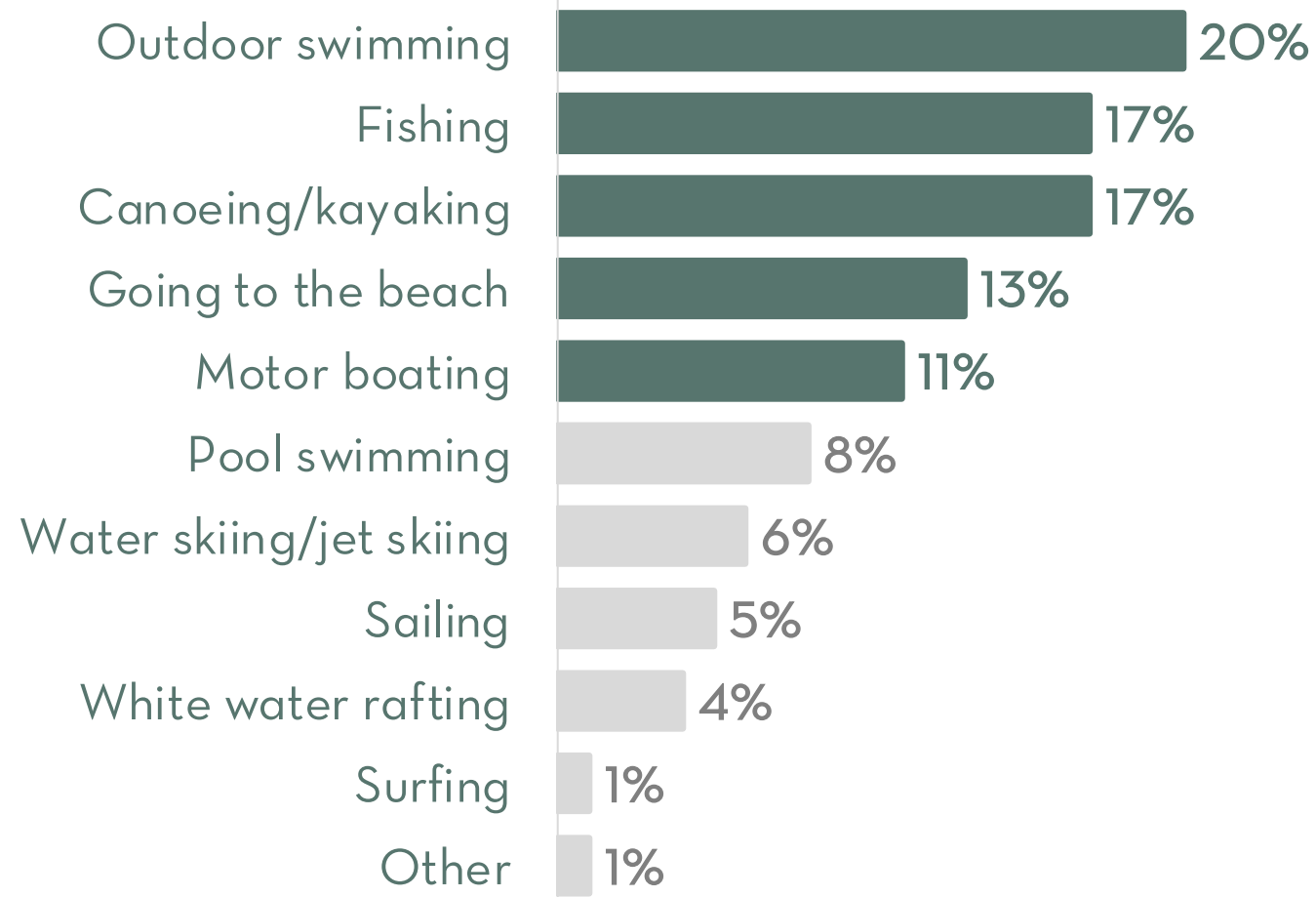
TOURING & SIGHTSEEING ACTIVITIES*



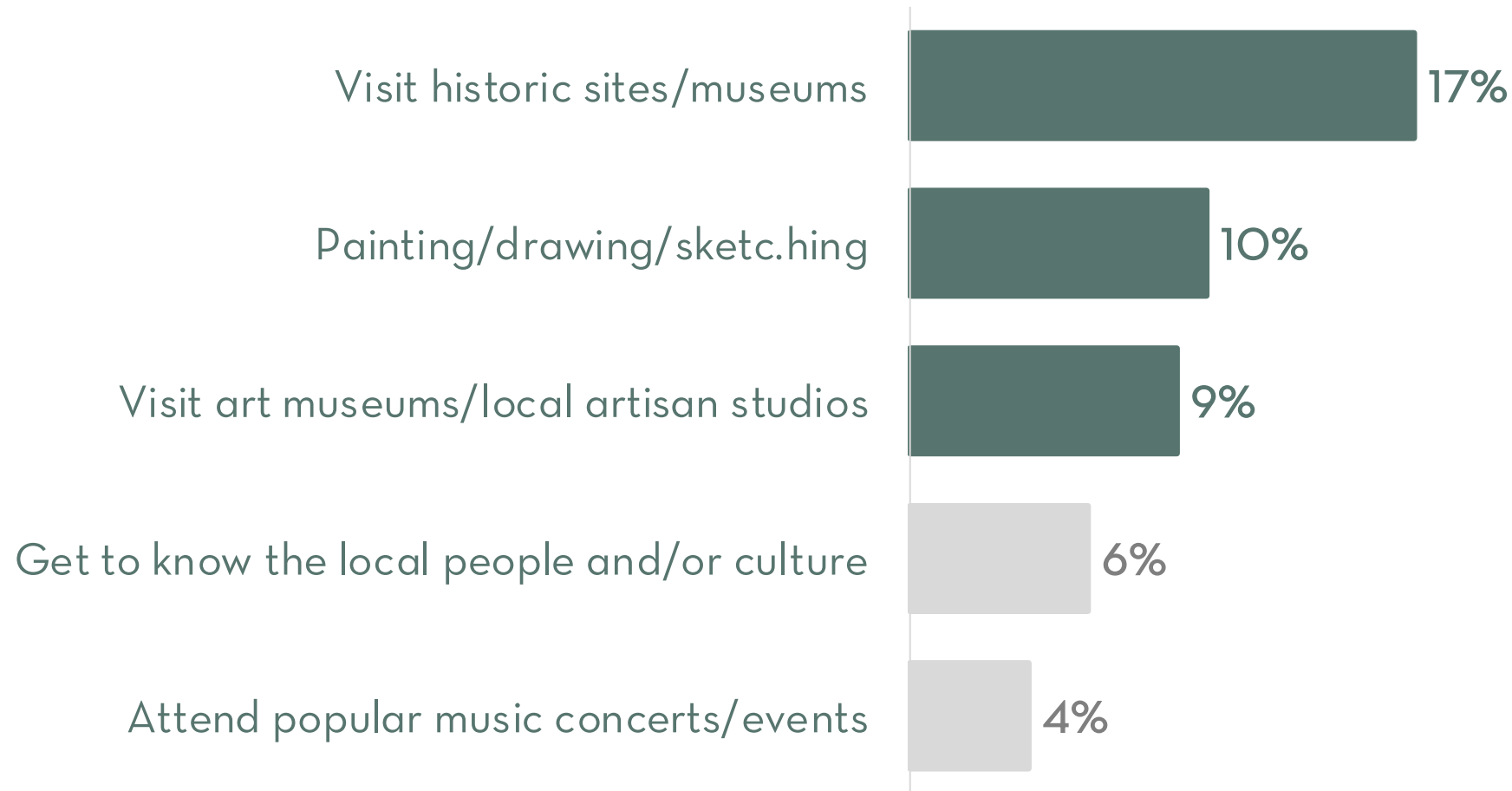
SHOPPING ACTIVITIES*



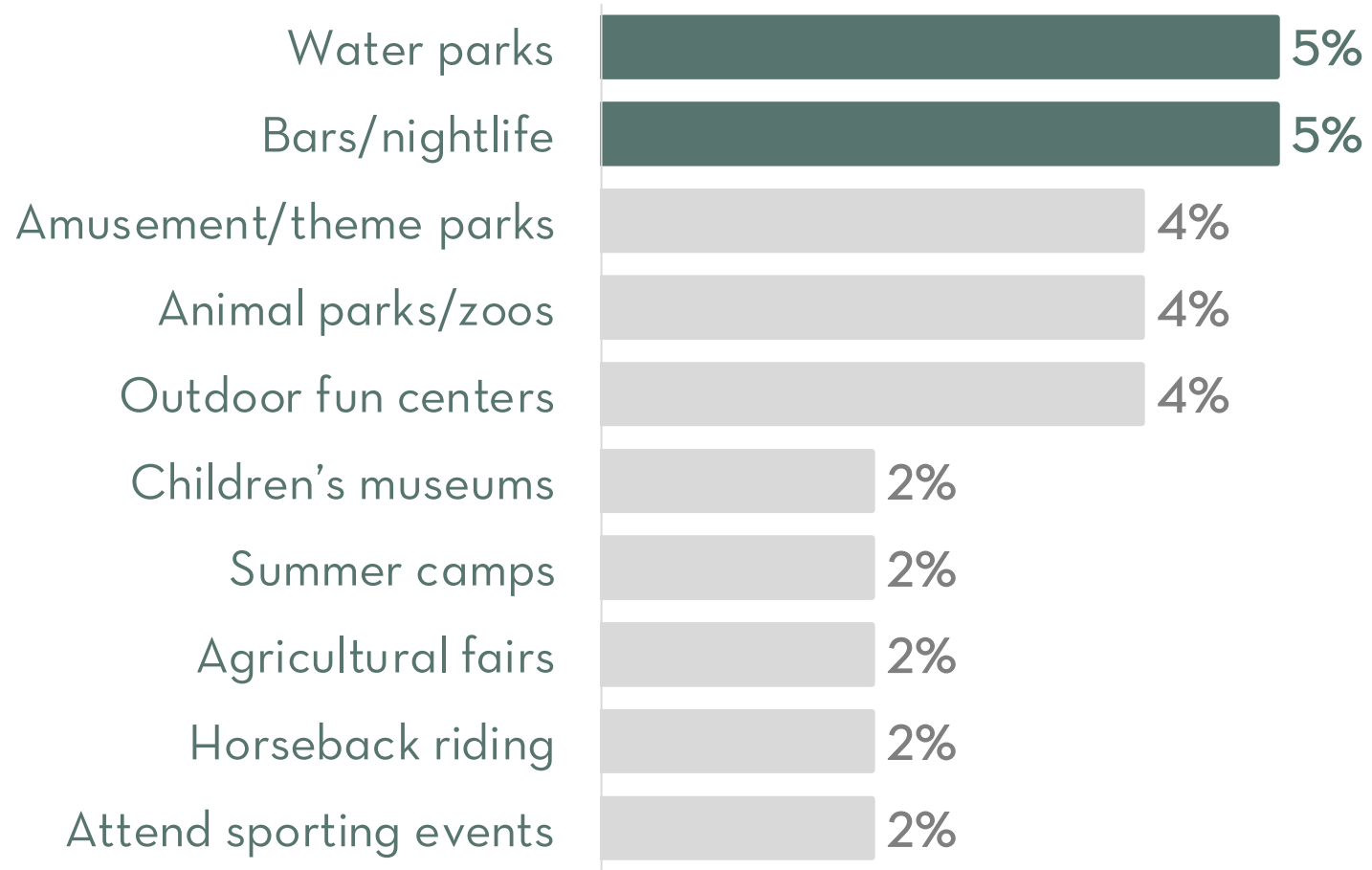
WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*

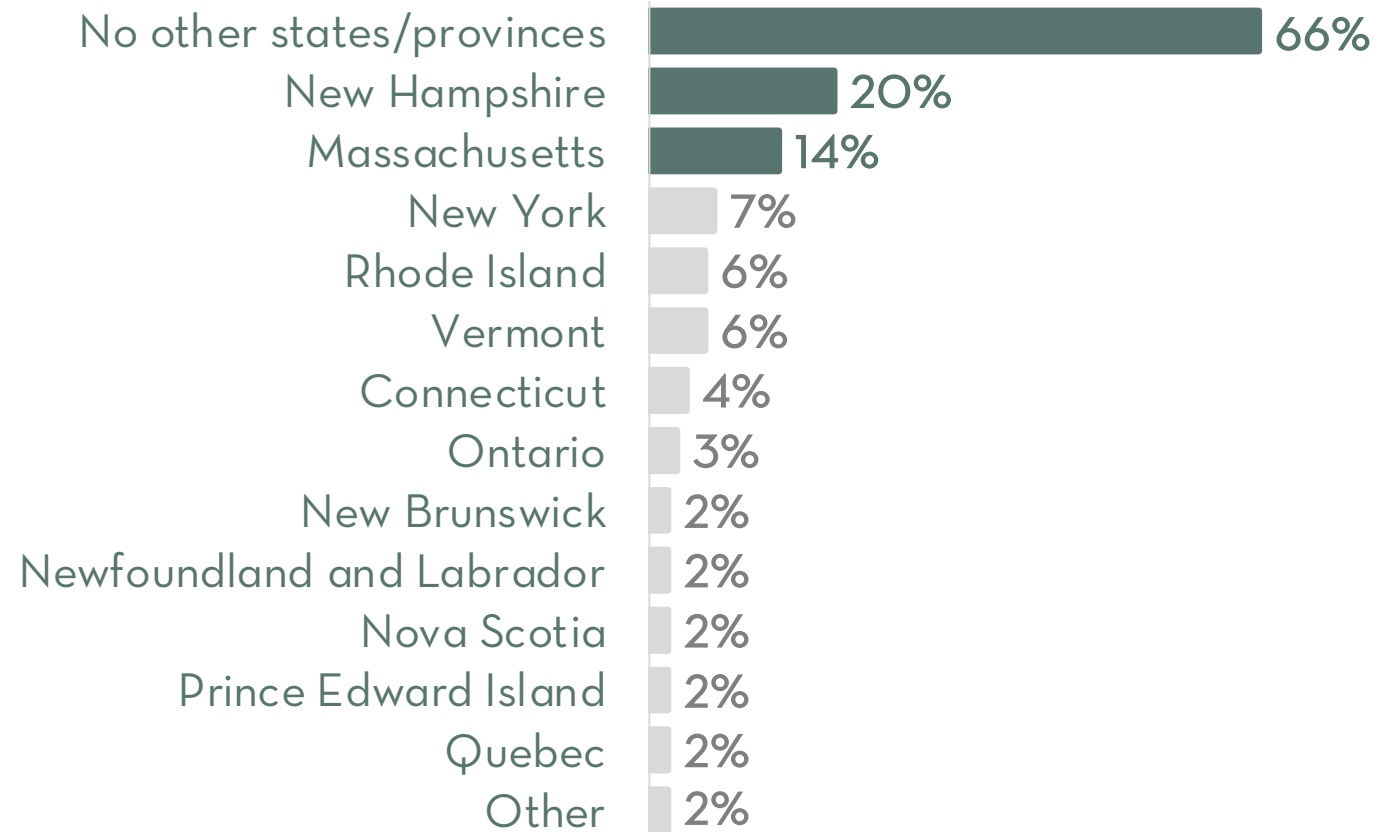


ENTERTAINMENT ACTIVITIES*



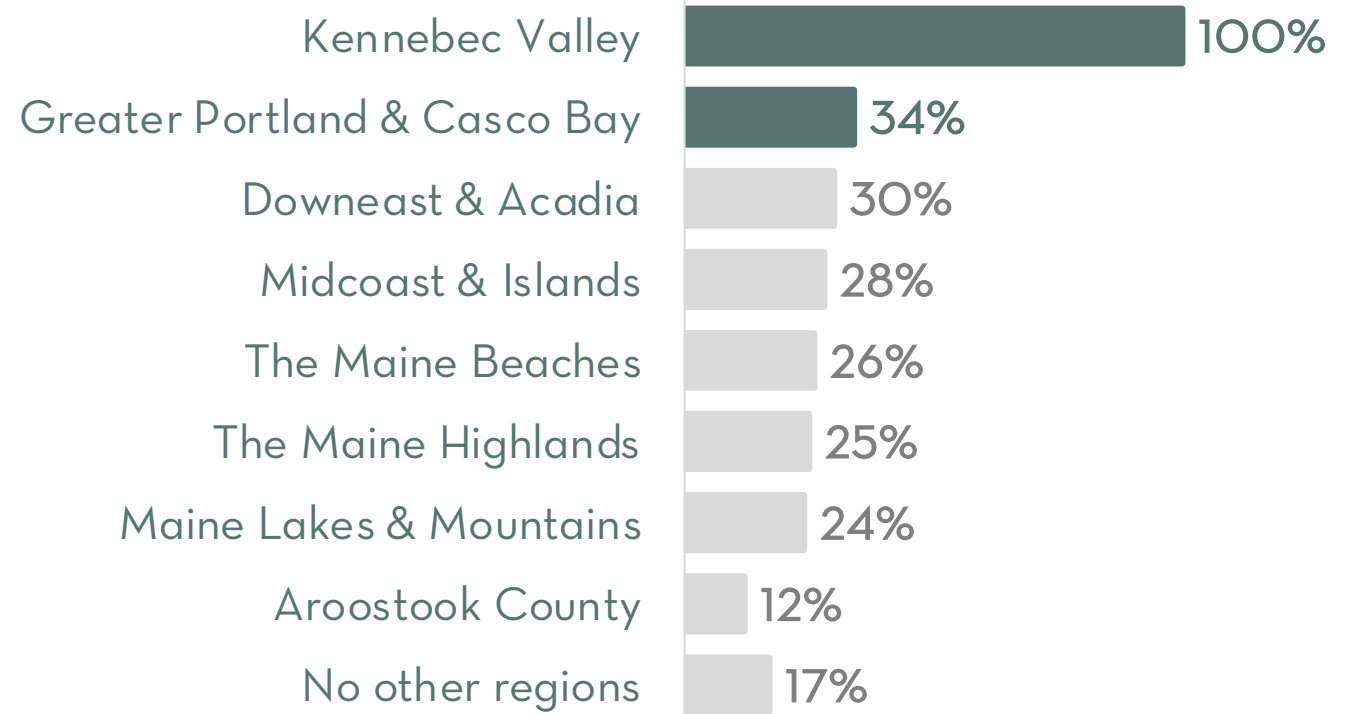
OTHER STATES & PROVINCES VISITED*

- » 2 in 3 visitors did not visit any other U.S. states or Canadian provinces on their trip to the Kennebec Valley region
- » Visitors to the Kennebec Valley region 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*

- » 17% of visitors stayed within the Kennebec Valley region during their trip in Maine, rather than traveling throughout the state
- » 34% of visitors to the Kennebec Valley region also visited Greater Portland & Casco Bay during their trip in Maine



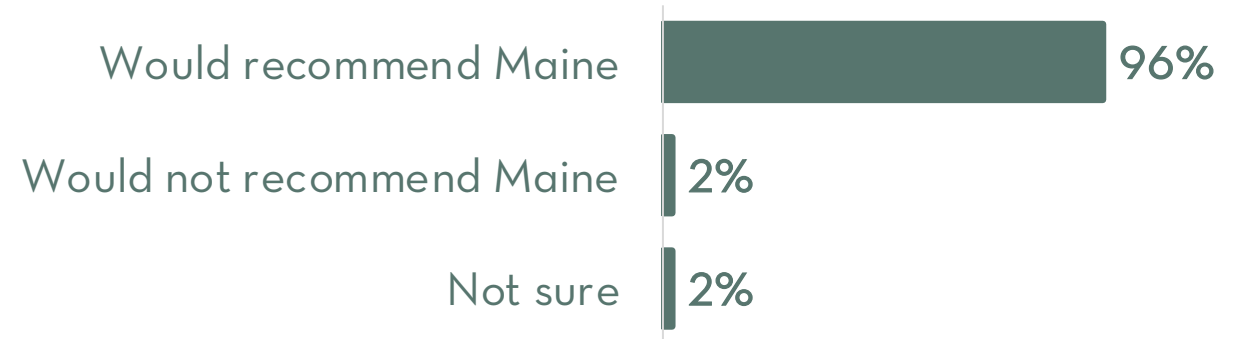
TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

» **96%** of visitors to the Kennebec Valley region would recommend that their friends and family visit Maine

Likelihood of Recommending Maine

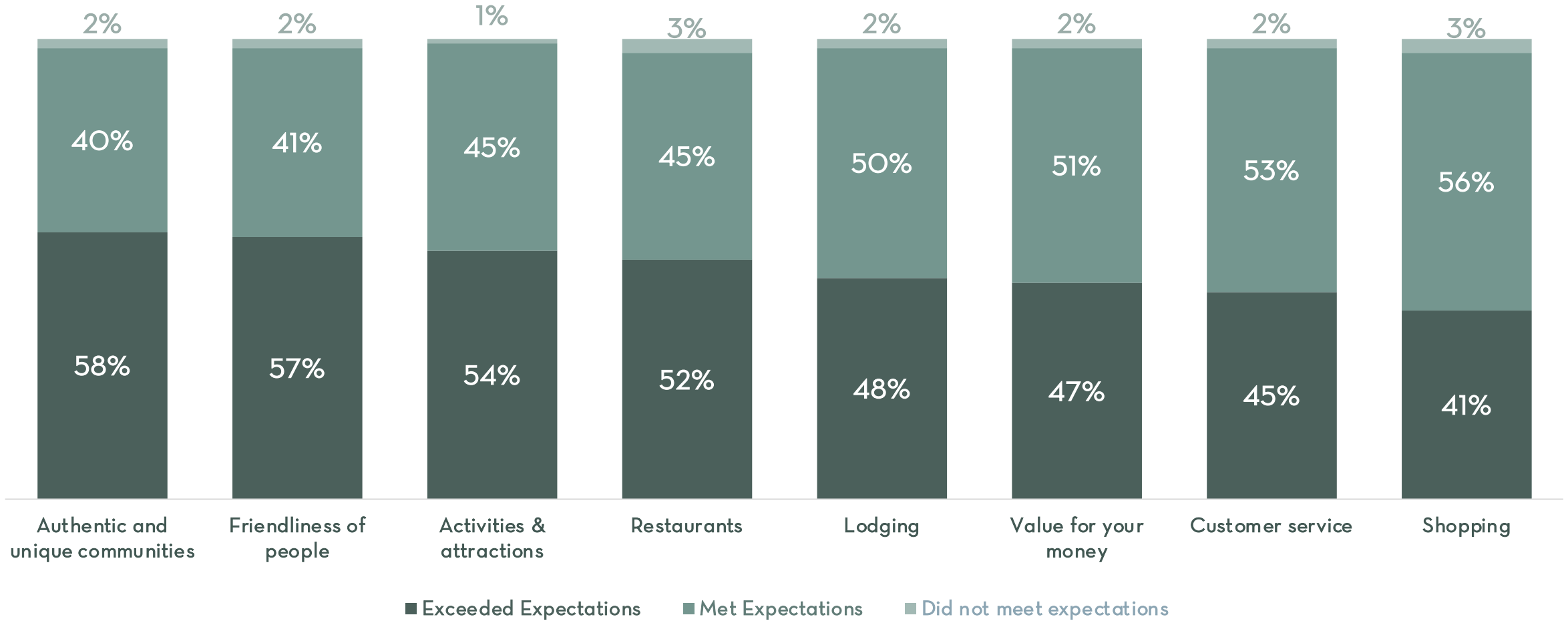


» **95%** of visitors would recommend that their friends and family visit the Kennebec Valley region

Likelihood of Recommending Kennebec Valley



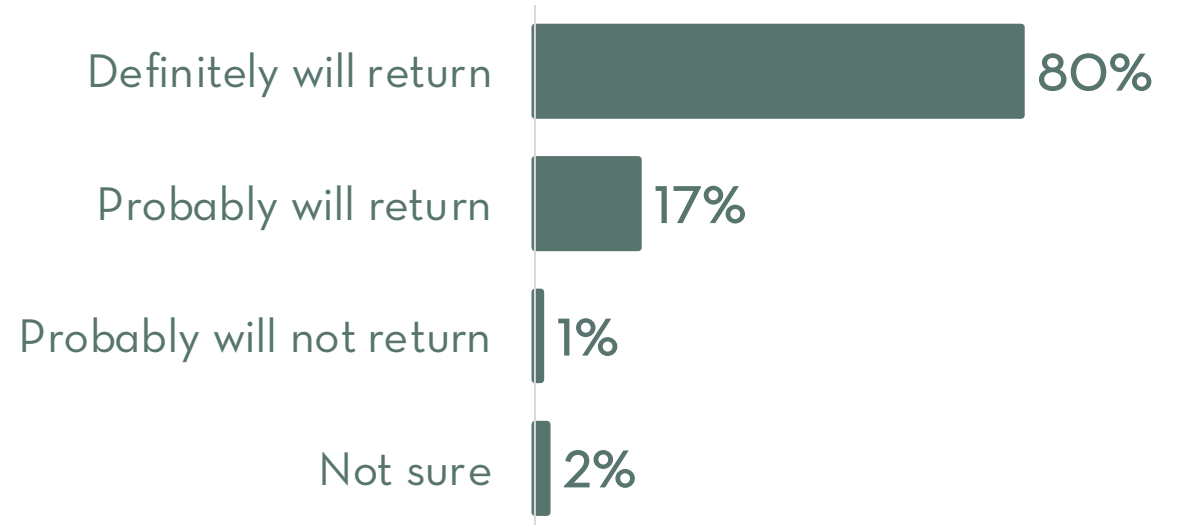
TRIP EXPECTATIONS



“Don’t know” responses omitted.

LIKELIHOOD OF RETURNING TO MAINE

» 97% of visitors to the Kennebec Valley region will return to Maine for a future visit or vacation



KENNEBEC VALLEY

2020 Visitor Tracking & Economic Impact Report January – December 2020

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