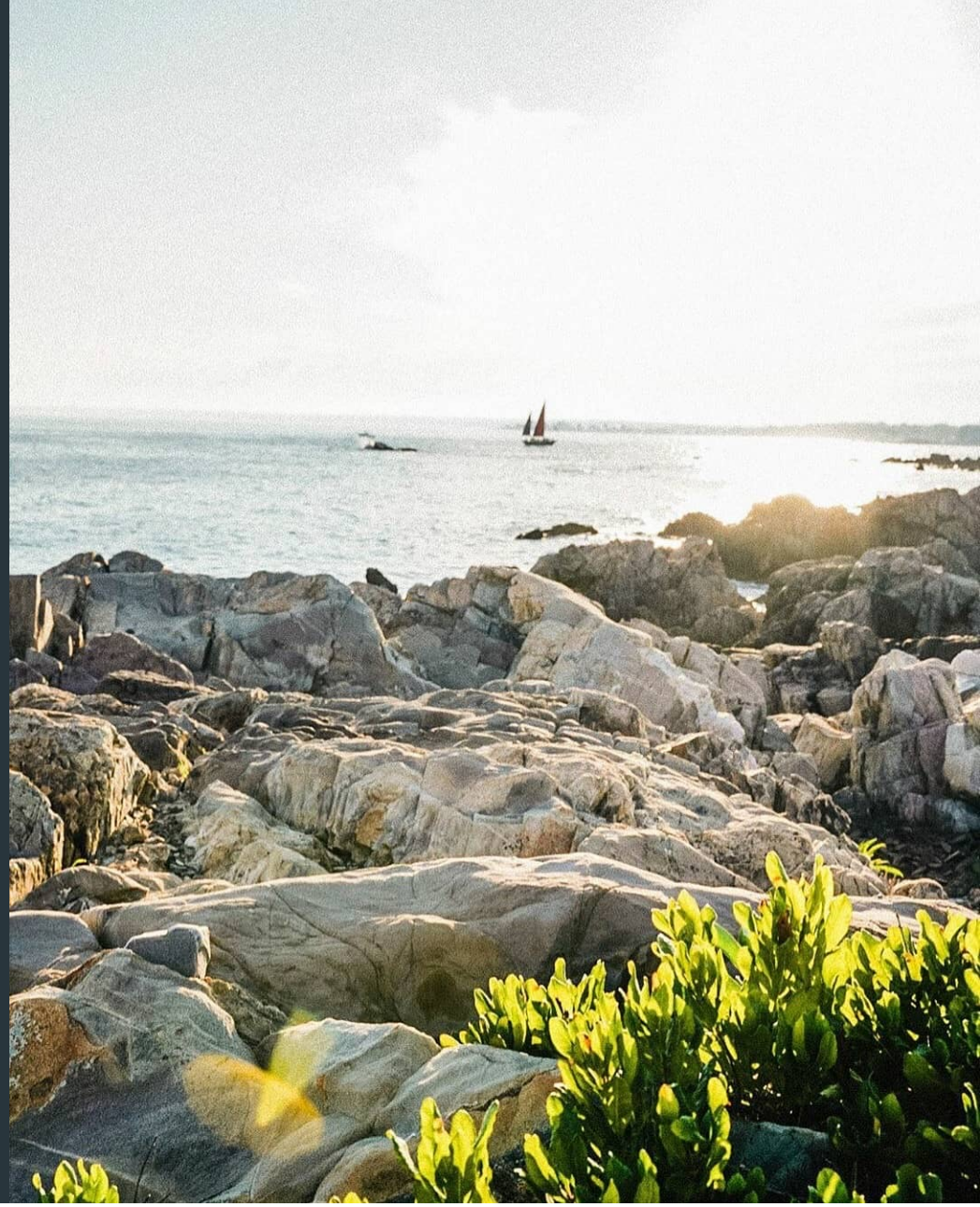
THE MAINE BEACHES

2020 Economic Impact & Visitor Tracking Report
January – December 2020



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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 **Maine Beaches** region.

Pre-Visit

- Planning cycle
- Planning sources
- Reasons for visiting
- Other considered destinations
- Exposure to advertising
- Advertising sources

Traveler Profile

- Visitor origin
- Travel party composition
- Visitor demographics
- Previous visits

Trip Experience

- Visitor transportation
- Nights stayed
- Accommodations
- Booking methods
- Trip resources
- Visitor activities
- Expectations vs. experience
- Visitor spending
- Included amenities
- Other areas visited

Post-Trip Evaluation

- Uniqueness of Maine
- Highlight of trip
- Recommending Maine
- Satisfaction with trip
- Likelihood of returning
- Perceptions of Maine

Impact of Tourism

- Economic impact of tourism
- Visitor direct spending
- Number of visitors
- Room nights generated
- Jobs supported by tourism
- Wages generated by tourism
- State & local taxes supported by tourism
- Occupancy
- Average daily rates
- Revenue per available room

METHODOLOGY

Visitor Tracking

944 interviews were completed with visitors to the Maine Beaches 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 the Maine Beaches 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.

MAINE BEACHES

Compared to visitors to other regions, visitors to The Maine Beaches region are more likely to:

- Have shorter planning and booking cycles
- Visit from New England
- Be loyal visitors who have returned more than ten times
- Drive to Maine
- Be day trippers
- Visit other states/provinces on their trip

TRIP PLANNING CYCLE : IMPACT OF TOURISM

ECONOMIC IMPACT

Visitor spending in 2020 generated

$2,458,210,600

in economic impact to the Maine Beaches region

DIRECT SPENDING

Visitors who took a trip to the Maine Beaches in 2020 spent

$1,606,673,600

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

VISITORS

The Maine Beaches attracted

3,994,700

visitors in 2020

ROOM NIGHTS

Visitors to the Maine Beaches generated

2,207,400

room nights in paid accommodations in 2020

JOBS SUPPORTED

The total economic impact of tourism in the Maine Beaches supported

27,200

jobs in 2020

WAGES GENERATED

Tourism in the Maine Beaches supported

$903,952,700

in wages and salaries in 2020

VISITORS CREATE JOBS

A Maine Beaches job is supported by every

147

visitors

HOUSEHOLD SAVINGS

Visitors to the Maine Beaches
saved local residents

$2,856

in taxes per household in 2020

LODGING METRICS

Lodging Metrics[1]	*2020*
Occupancy (%)	*35.1%*
Average Daily Rate	*$136.70*
Revenue per Available Room	*$47.98*
Total Accommodations Revenue	*$301,743,100*

TRIP PLANNING CYCLE : PRE-VISIT

TRIP PLANNING CYCLE

- 53% of visitors started planning their trip to the Maine Beaches less than a month in advance

- 62% of visitors booked their trip/decided to visit the Maine Beaches less than a month in advance

TOP ONLINE TRIP PLANNING SOURCES*

27% Online search engines

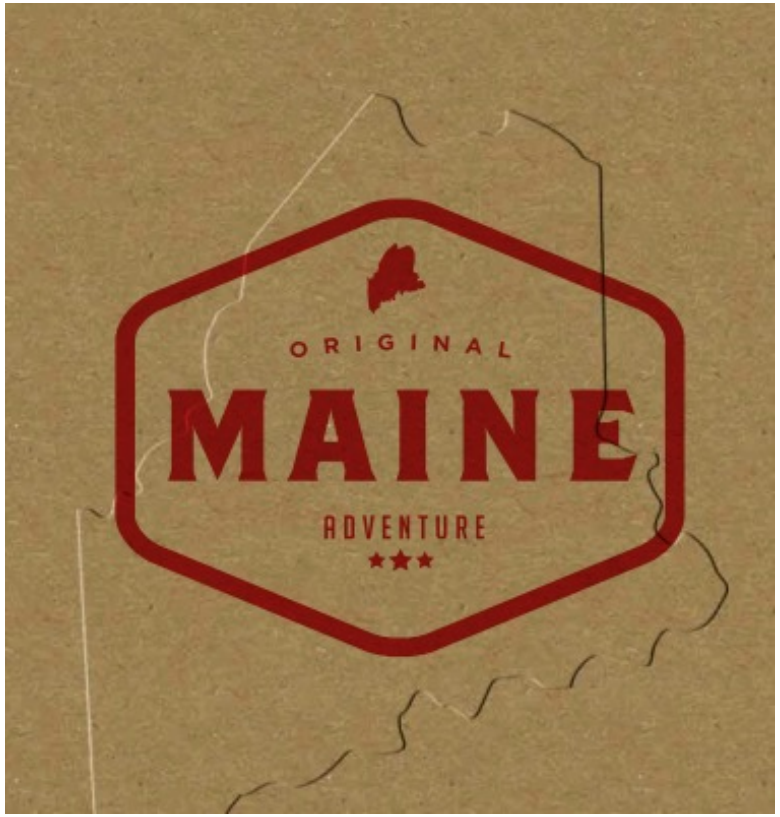
18% Facebook

15% Hotel websites

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*

36% Advice from friends/family



12% Travel guides/brochures

9% Travel books & magazines

*Multiple responses permitted.

TOP REASONS FOR VISITING*

35% Vacation

29% Relax and unwind

27% Visiting friends/ relatives

22% Beach

*Up to three responses permitted.

CONSIDERING MAINE AS A DESTINATION

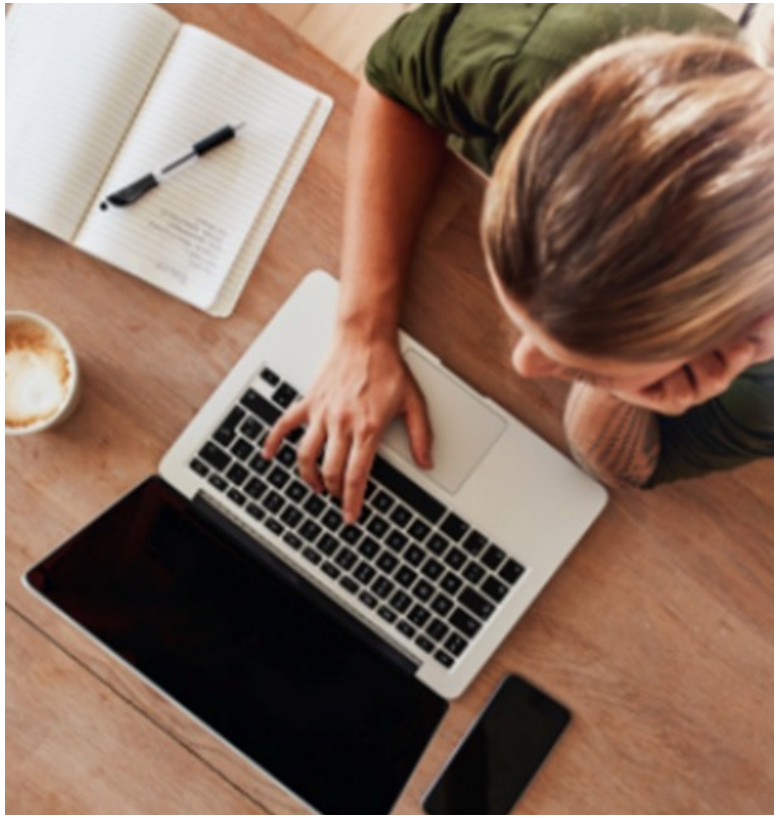
- 58% of visitors to the Maine Beaches did not consider visiting any U.S. state or Canadian province instead of Maine while planning their trip

PRE-TRIP EXPOSURE TO ADVERTISING

- **44%** of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to the Maine Beaches

TOP SOURCES OF ADVERTISING EXPOSURE*

39% Social media



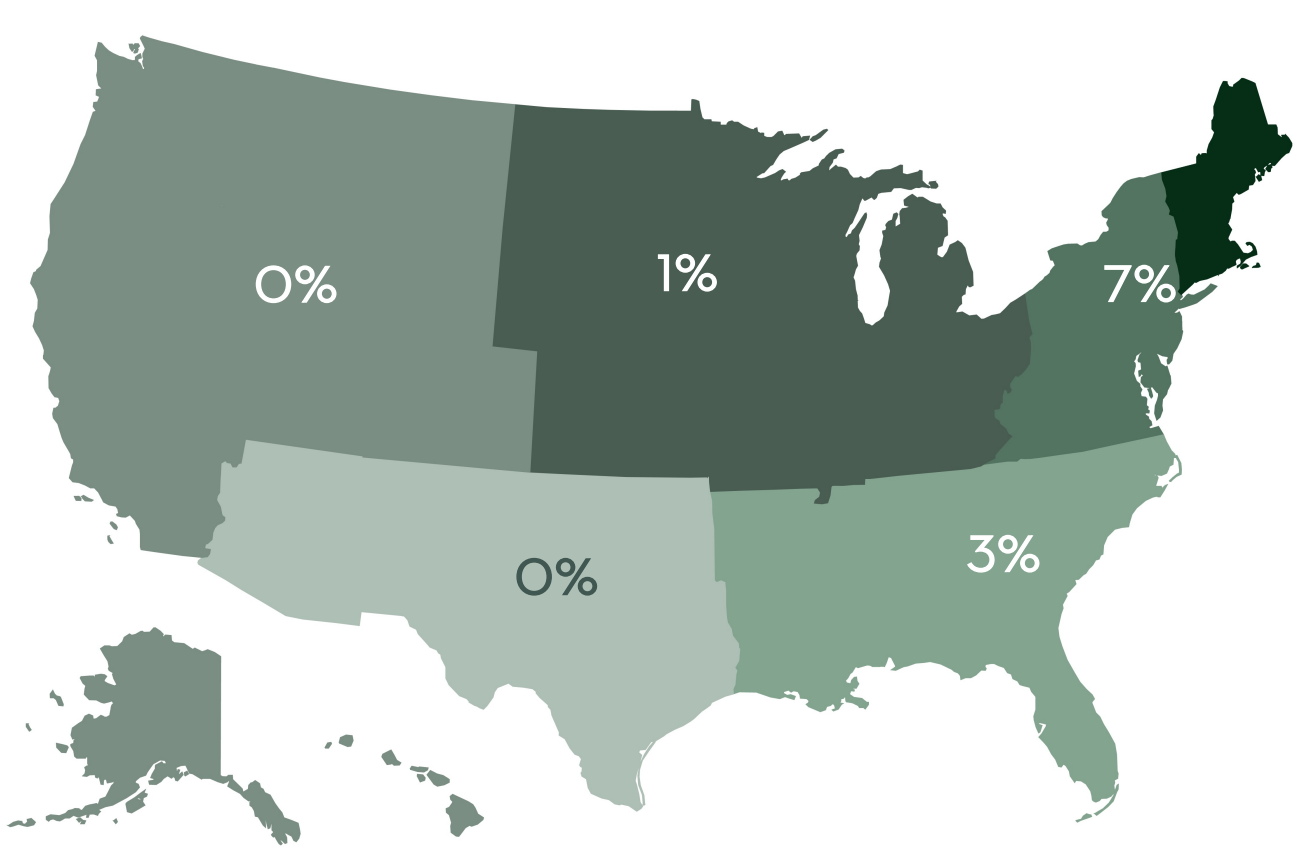
38% Internet

26% Cable or satellite television

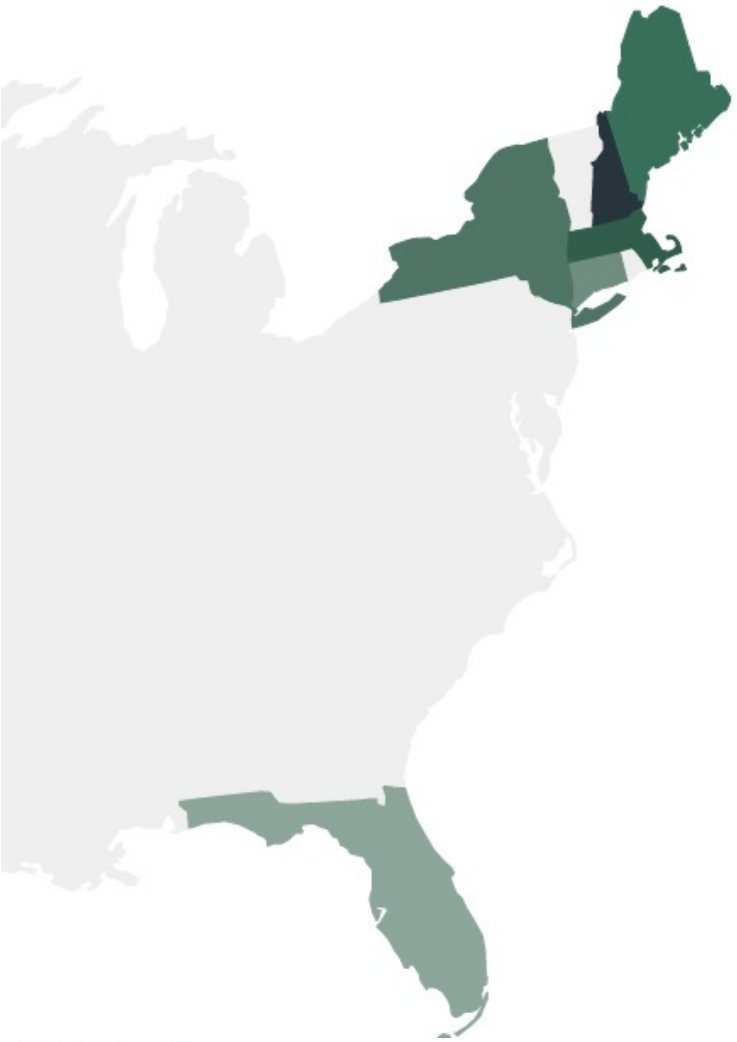
*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE

REGIONS OF ORIGIN



TOP ORIGIN STATES & PROVINCES



80% of visitors to the Maine Beaches traveled from 6 U.S. states, including from other regions of Maine.

- New Hampshire (25%)
- Massachusetts (22%)
- Maine (19%)
- New York (6%)
- Connecticut (4%)
- Florida (4%)

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TOP ORIGIN MARKETS

15% Boston, MA

7% Rochester – Portsmouth, NH

6% New York City, NY

TRAVEL PARTIES

The typical visitor to the Maine Beaches traveled with 2.6 people in their visitor party

23% of visitors traveled with at least one person under the age of 18 in their travel party

VISITOR PROFILE

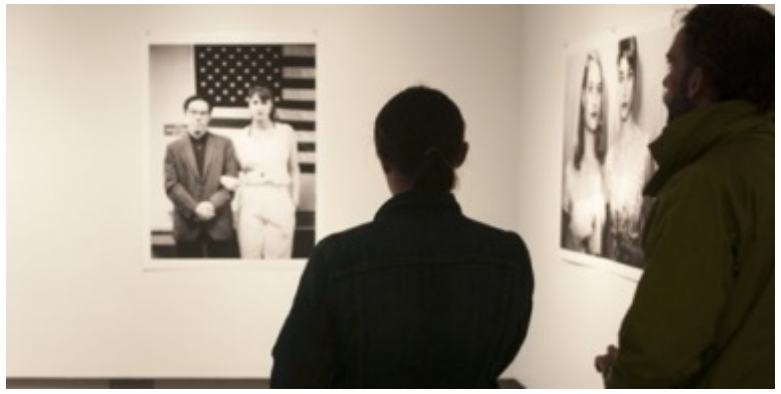
59% Female*

67% College/technical graduate

68% Married/domestic partnership

52% Employed full-time

90% White/Caucasian



$82,100 annual household income

*Of visitors interviewed

VISITOR PROFILE: DAY TRIPPERS

- The typical day tripper[1]:
  - Earned $68,200 per year
  - Was female (65%)
  - Had a college/technical degree (64%)
  - Was married or living with their partner (57%)
  - Was employed full-time (50%)
  - Was White/Caucasian (92%)
  - 13% traveled with children
  - Was from Maine (16%) and other northeastern U.S. states (82%)

[1] Did not stay overnight in the Maine Beaches during their trip.

VISITOR PROFILE: OVERNIGHT VISITORS

- The typical overnight visitor[1]:
  - Earned $86,900 per year
  - Was female (57%)
  - Had a college/technical degree (69%)
  - Was married or living with their partner (72%)
  - Was employed full-time (52%)
  - Was White/Caucasian (90%)
  - 27% traveled with children
  - Was from Maine (20%) and other northeastern U.S. states (59%)

[1] Stayed one or more nights in the Maine Beaches during their trip.

NEW & RETURNING VISITORS

- 12% of visitors to the Maine Beaches were traveling in Maine for the first time
- Half of visitors to the Maine Beaches had previously traveled in Maine more than 10 times

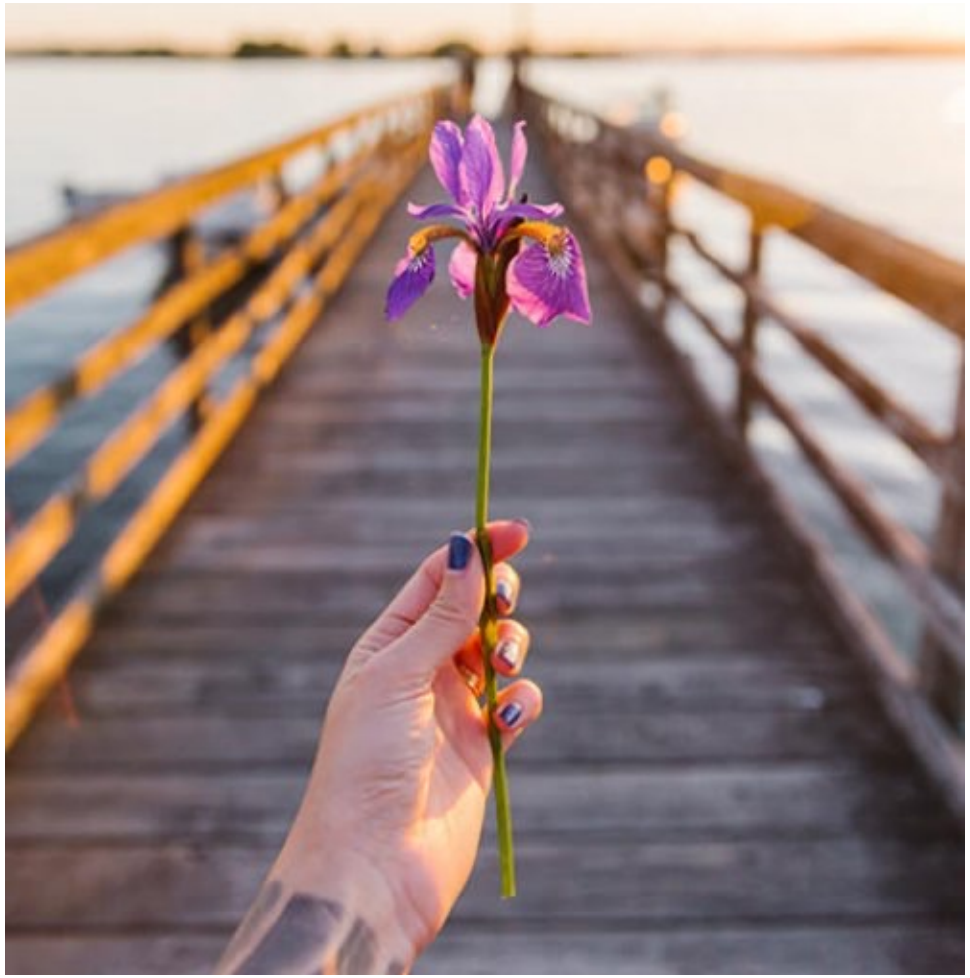
TRIP PLANNING CYCLE : TRIP EXPERIENCE

TRANSPORTATION

- 95% of visitors drove to the Maine Beaches
- 2% of visitors to the Maine Beaches flew to Maine through Portland International Jetport

NIGHTS STAYED

- 1 in 2 visitors to the Maine Beaches spent one or more nights in Maine
- Typical visitors to the Maine Beaches stayed 4.0 nights in Maine



TOP ACCOMMODATIONS

48% Did not stay overnight

20% Hotel/motel/resort

10% Friends/family home

TOP IN-MARKET VISITOR RESOURCES*

34% Navigation websites/apps

24% Restaurant website/app

18% Visitor Information Centers

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*

66% Food/ beverage/culinary

46% Touring/ sightseeing

43% Active outdoor activities

38% Shopping

37% Water activities

*Multiple responses permitted.

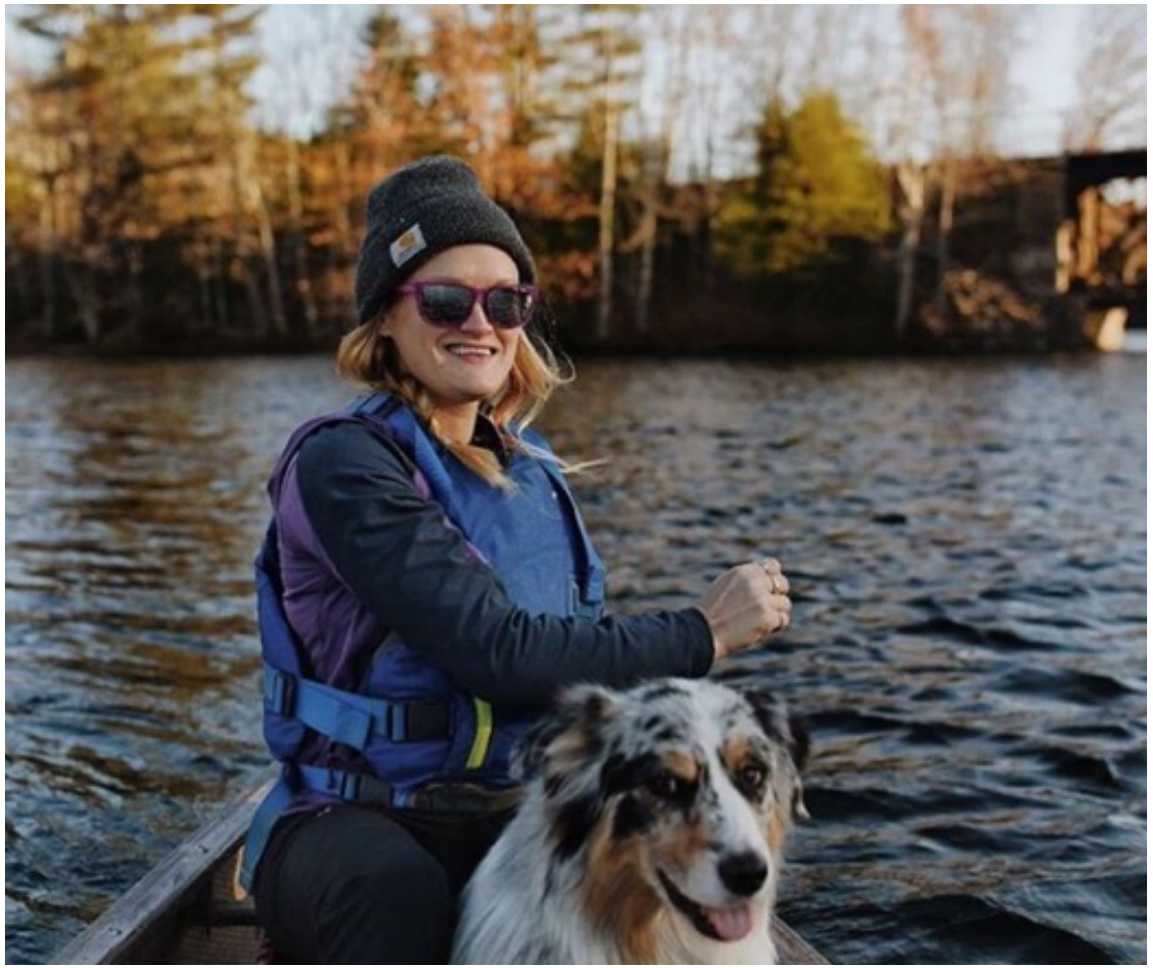
VISITING OTHER STATES & PROVINCES

- 2 in 3 visitors did not visit any other U.S. state or Canadian province on their trip to the Maine Beaches

- Visitors to the Maine Beaches were more likely to visit U.S. states near Maine than they were to visit a Canadian province during their trip

TRAVELING WITHIN MAINE

- 7 in 10 visitors traveled to regions other the Maine Beaches during their trip
- 1 in 3 visitors to the Maine Beaches also visited Greater Portland & Casco Bay during their trip



TRIP PLANNING CYCLE : POST-TRIP EVALUATION

RECOMMENDING MAINE & ITS REGIONS

- 98% of visitors to the Maine Beaches would recommend Maine to a friend or relative as a vacation destination

- 97% of visitors would recommend the Maine Beaches as a place to visit or vacation

LIKELIHOOD OF RETURNING TO MAINE

- **97%** of visitors to the Maine Beaches will return to Maine for a future visit or vacation

DETAILED FINDINGS

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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

Economic Impact	*2020*
Visitors	*3,994,700*
Room nights generated	*2,207,400*
Direct expenditures	*$1,606,673,600*
Total economic impact	*$2,458,210,600*

IMPACT OF TOURISM

Maine Jobs	*2020*
Jobs generated (direct)	*20,700*
Total impact of tourism on Maine jobs	*27,200*

Maine Wages	*2020*
Wages paid (direct)	*$646,638,700*
Total impact of tourism on Maine wages	*$903,952,700*

IMPACT OF TOURISM

Return on Investment	*2020*
Visitors per job supported	*147*
State & local taxes supported	*$243,682,000*
Tax savings per household	*$2,856*

LODGING METRICS

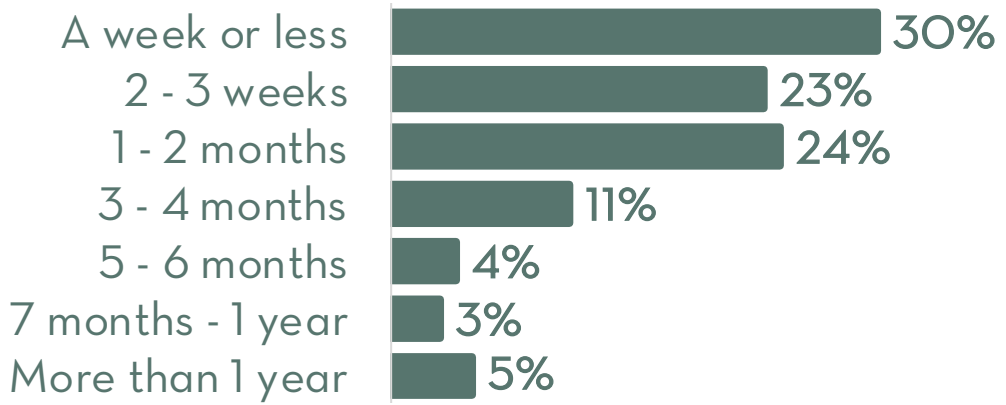
Lodging Metrics[1]	*2020*
Occupancy (%)	*35.1%*
Average Daily Rate	*$136.70*
Revenue per Available Room	*$47.98*
Total Accommodations Revenue	*$301,743,100*

TRIP PLANNING CYCLE : PRE-VISIT

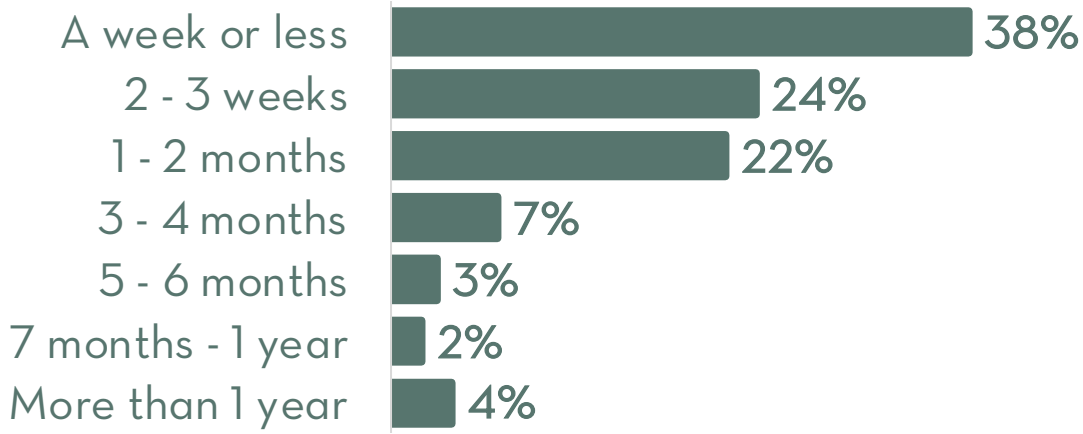
TRIP PLANNING CYCLE

- 53% of visitors to the Maine Beaches started planning their trip within a month of their trip
- Very few visitors (12%) have planning windows longer than 4 months
- 62% of visitors have a booking window of less than 1 month
- Very few visitors (9%) booked accommodations 5+ months in advance

Beginning of Trip Planning Cycle

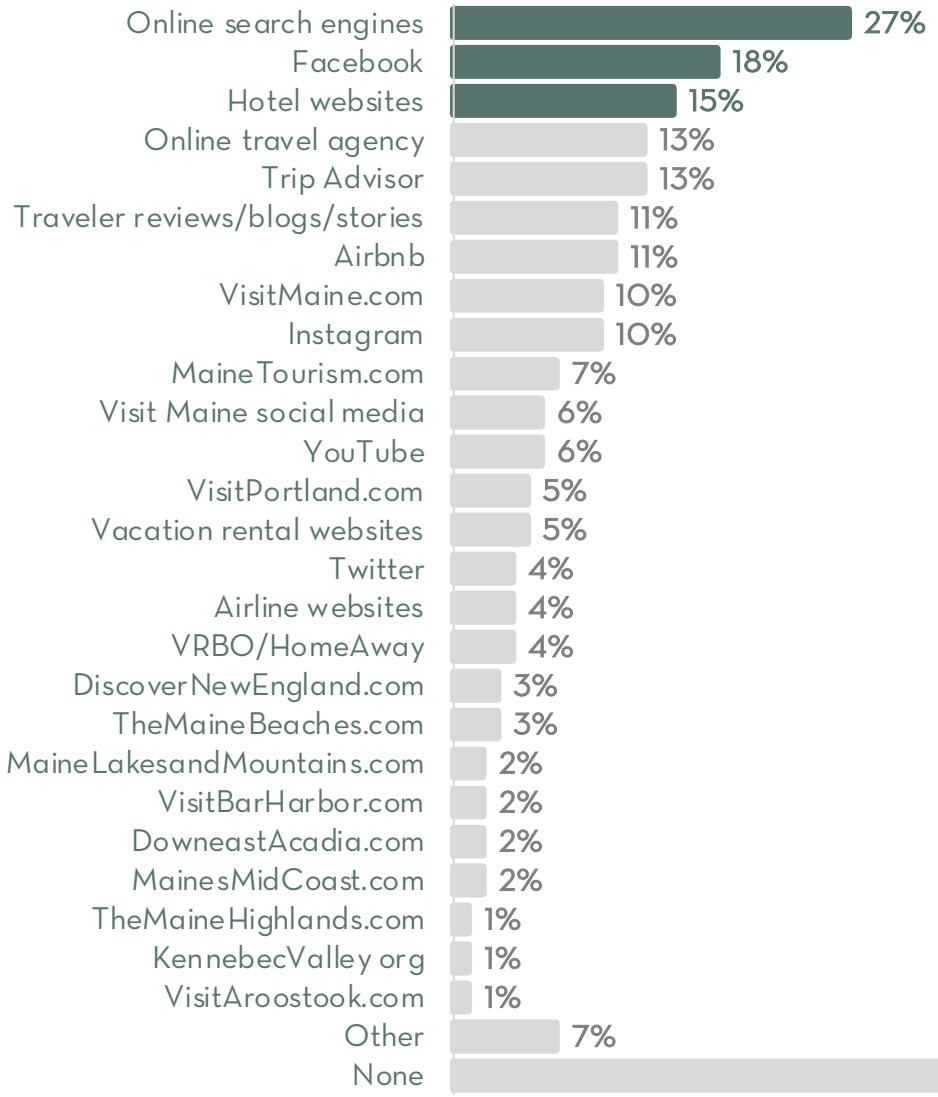


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

- 2 in 3 visitors used one or more online resources to help them plan their trip to the Maine Beaches
- 27% of visitors used an online search engine, such as Google, to help them plan their trip to the Maine Beaches
- 1 in 10 visitors used VisitMaine.com, and 7% used MaineTourism.com



*Multiple responses permitted.

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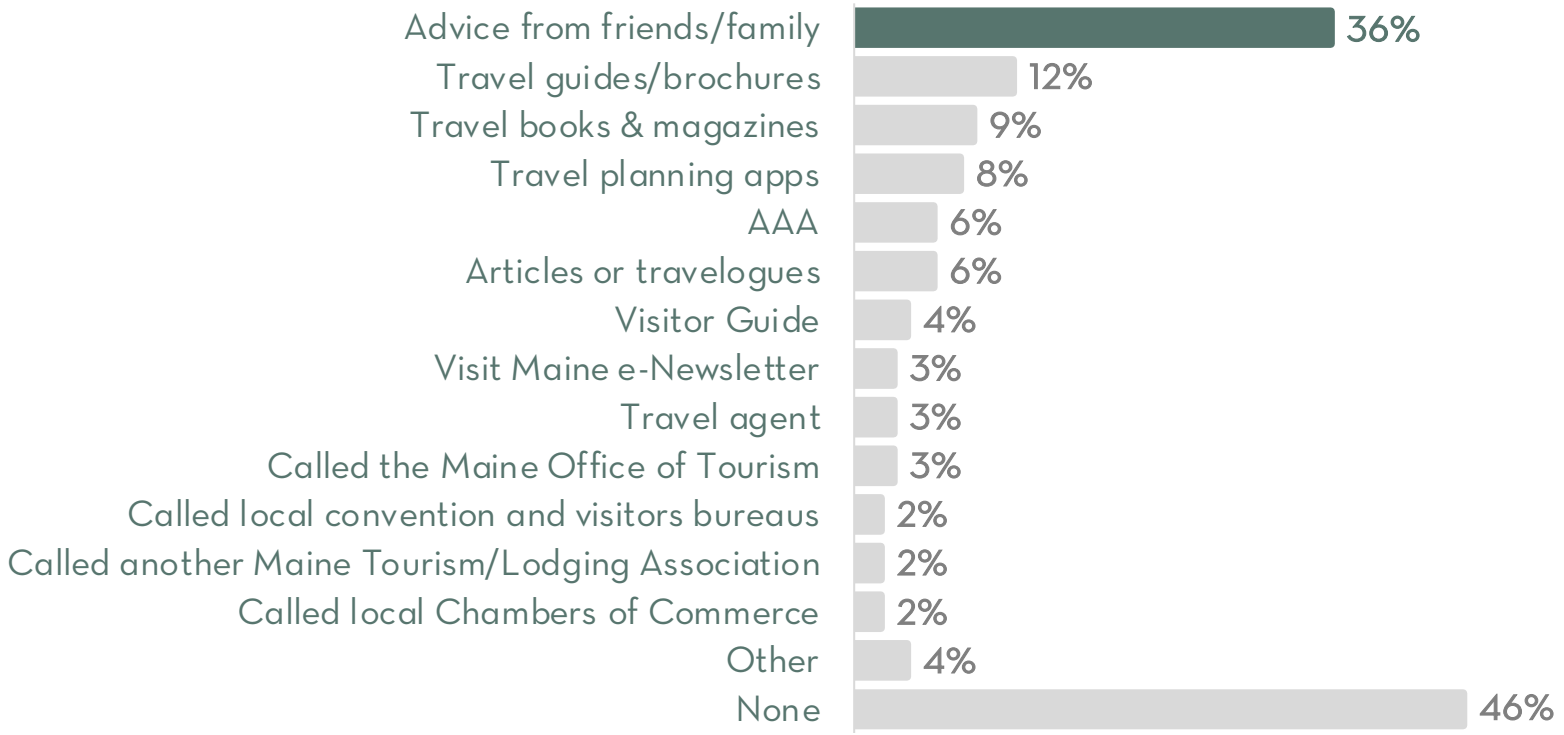
OTHER TRIP PLANNING SOURCES*

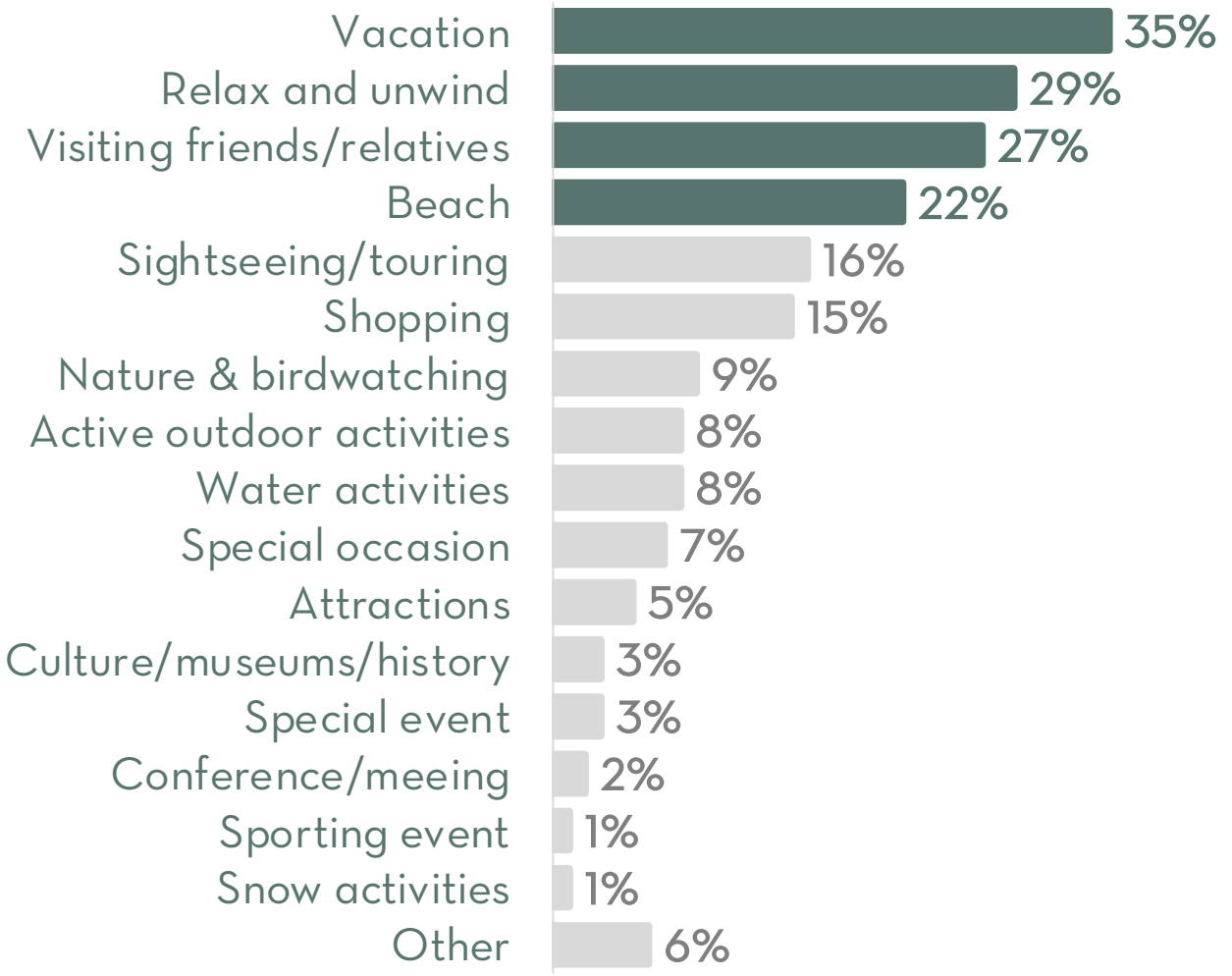
- 36% of visitors relied on advice from their friends and family to help them plan their trip to the Maine Beaches
- 46% of visitors did not use any other resources to help them plan their trip to the Maine Beaches



*Multiple responses permitted.

REASONS FOR VISITING*

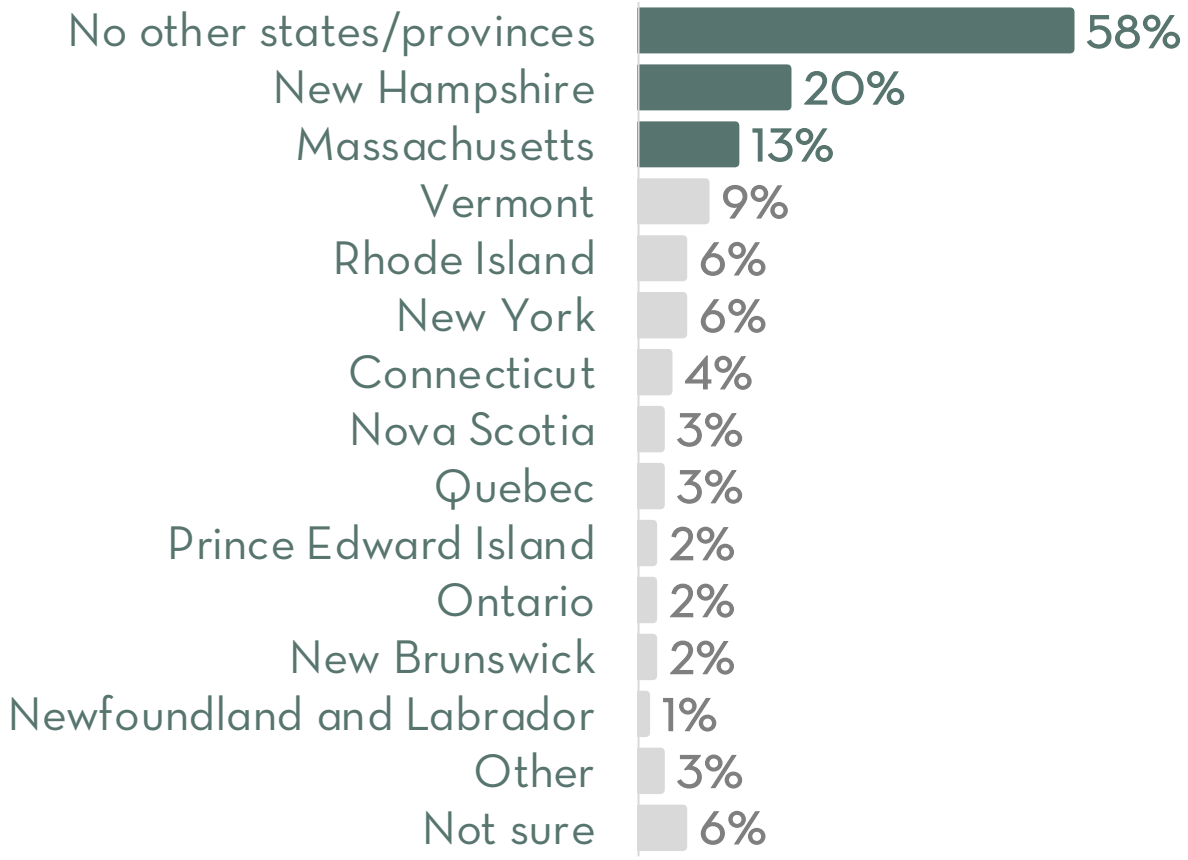
- 35% of visitors primarily traveled to the Maine Beaches for a vacation
- 3 in 10 visitors came to the Maine Beaches to relax and unwind, or to visit their friends/relatives



*Multiple responses permitted.

OTHER STATES & PROVINCES CONSIDERED*

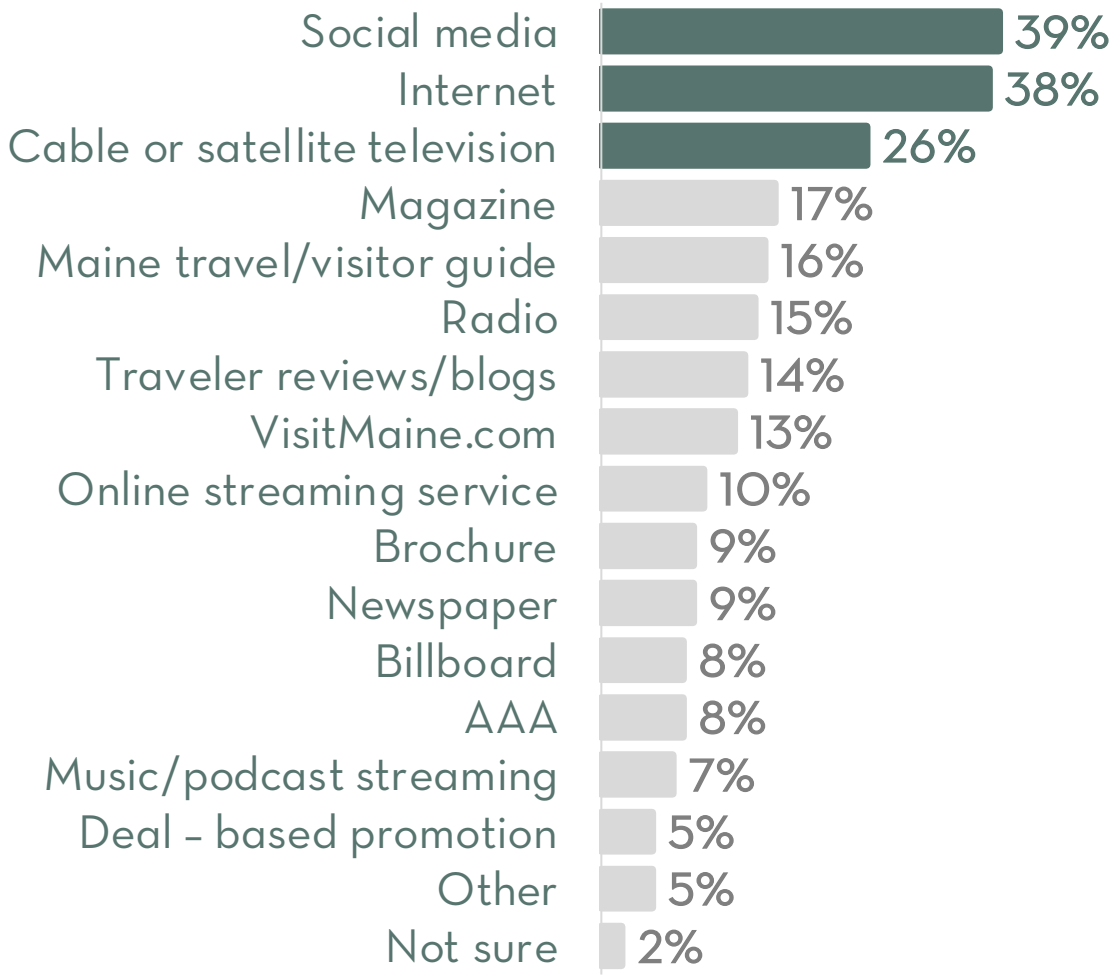
- 58% of visitors considered visiting ONLY Maine while planning their trip to the Maine Beaches
- Visitors to the Maine Beaches were more likely to consider visiting nearby U.S. states rather than visiting a Canadian province



*Multiple responses permitted.

PRE-TRIP EXPOSURE TO ADVERTISING*

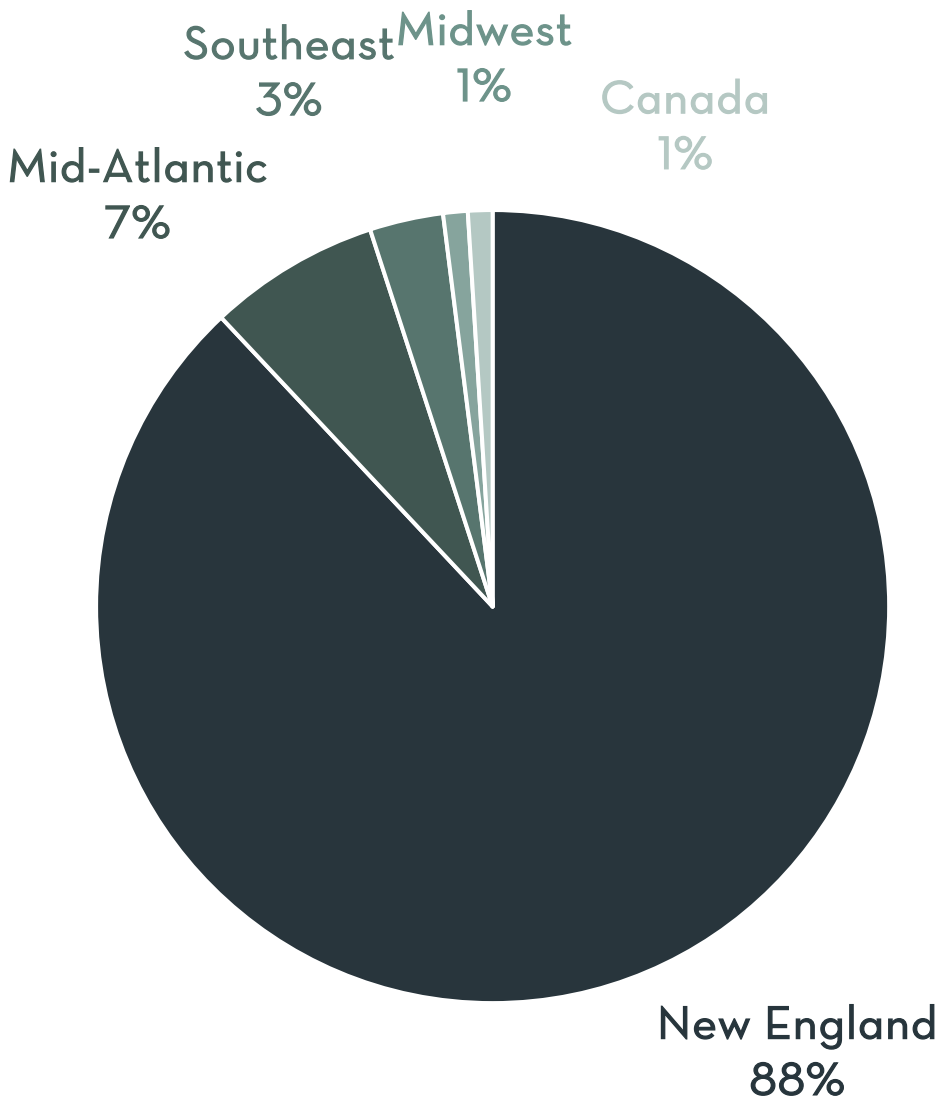
- **44%** of visitors noticed advertising or promotions for Maine prior to their trip to the Maine Beaches
- Visitors who were exposed to this advertising primarily saw it on **social media**, the **internet**, or on **television**
- Visitors were more likely to notice Maine promotions on **digital** media rather than on **traditional** media



*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE

VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- 2 in 3 visitors to the Maine Beaches were from New Hampshire, Massachusetts, or Maine
- 87% of visitors to the Maine Beaches came from 9 U.S. states

State/Country	Percent
New Hampshire	25%
Massachusetts	22%
Maine	19%
New York	6%
Connecticut	4%
Florida	4%
New Jersey	3%
Vermont	2%
Pennsylvania	2%

TOP ORIGIN MARKETS

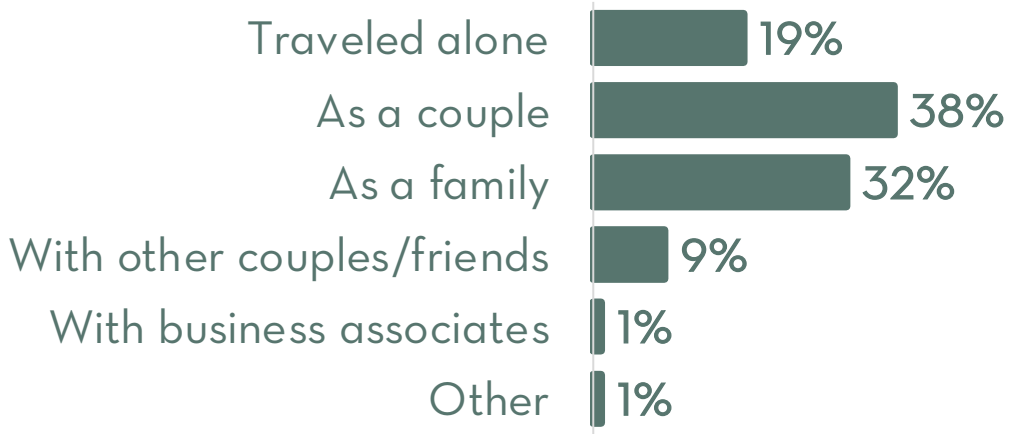
- More visitors traveled to the Maine Beaches from **Boston** than from any other market
- **38%** of visitors to the Maine Beaches traveled from **7** northeastern and southeastern markets outside of Maine

Market	Percent
Boston, MA	15%
Rochester - Portsmouth, NH	7%
New York City, NY	6%
Manchester, NH	3%
Hampton, NH	3%
Washington D.C. – Baltimore, MD	2%
Nashua, NH	2%

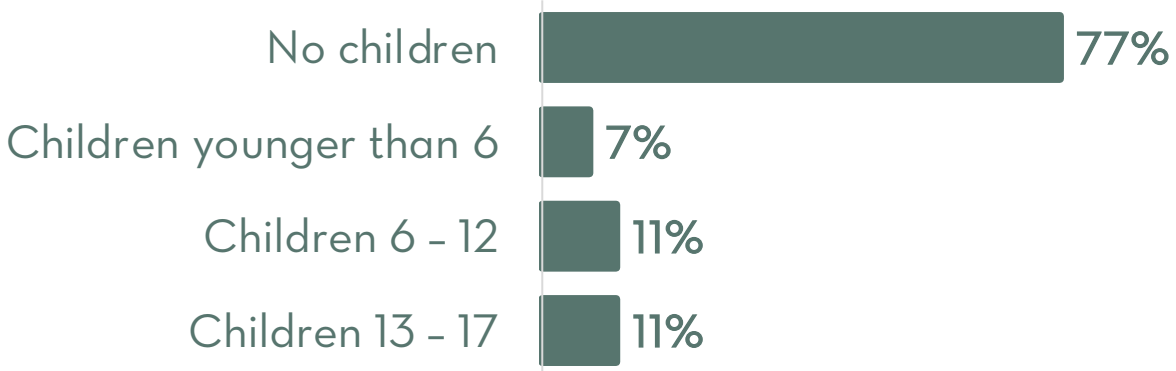
TRAVEL PARTIES

- Typical visitors traveled to the Maine Beaches with a party of 2.6 people
- 2 in 5 visitors traveled as a couple
- Only 23% of visitors traveled to the Maine Beaches with one or more children in their travel party

Travel Party Composition



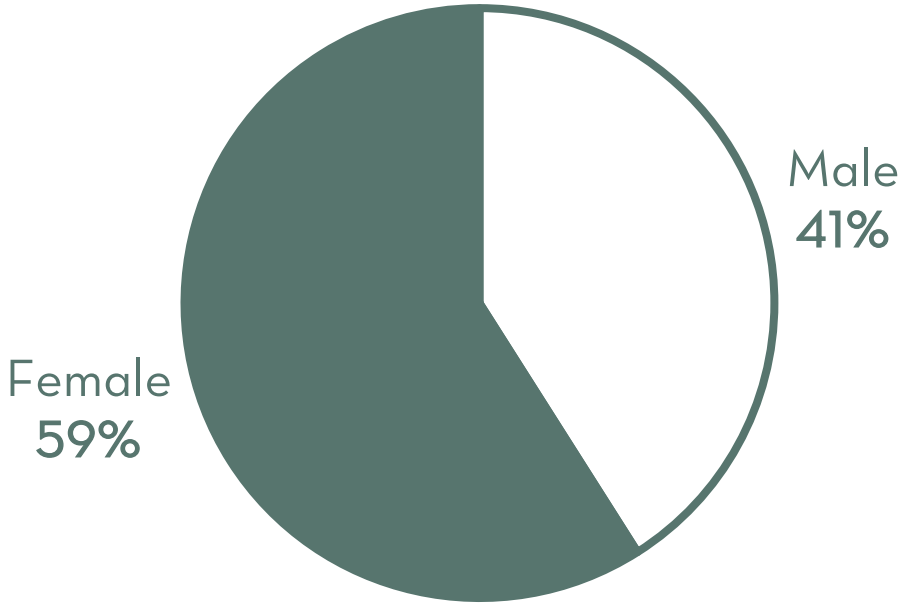
*Children in Travel Party**



*Multiple responses permitted.

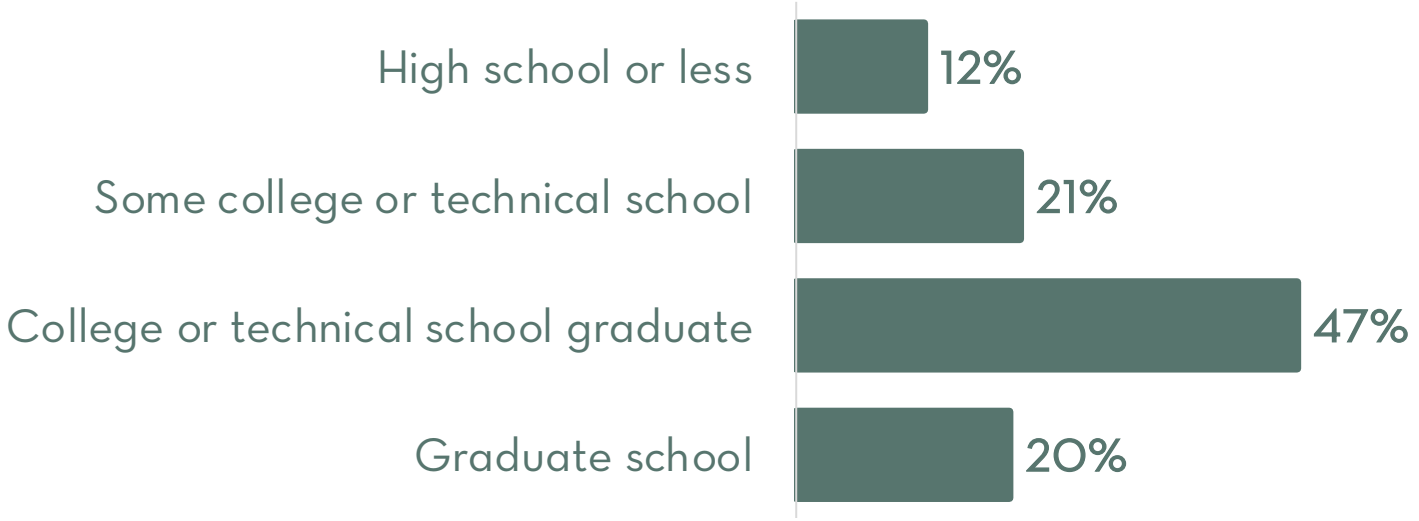
GENDER

» 3 in 5 visitors to the Maine Beaches who were interviewed were female



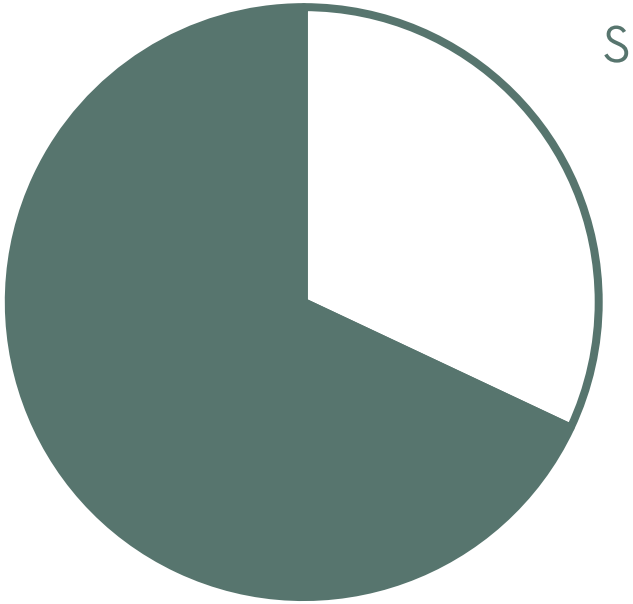
EDUCATIONAL ATTAINMENT

- Visitors to the Maine Beaches have substantial formal educations, with **2 out of 3** having at least a college or technical school degree, and **1 in 5** possessing a graduate degree



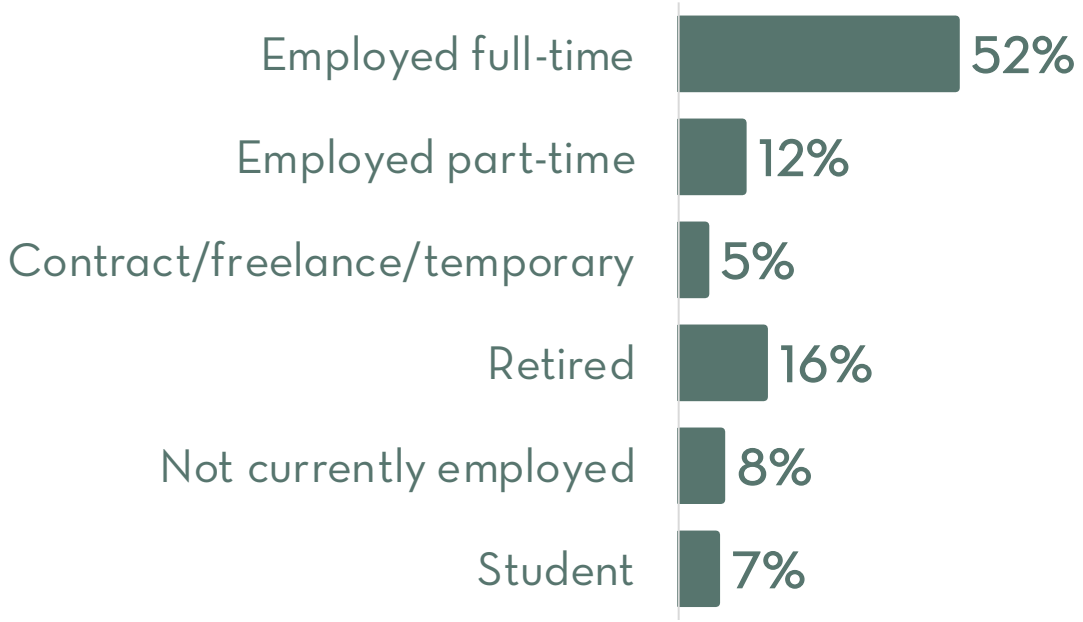
MARITAL STATUS

» 2 in 3 visitors to the Maine Beaches were married or living with their partner



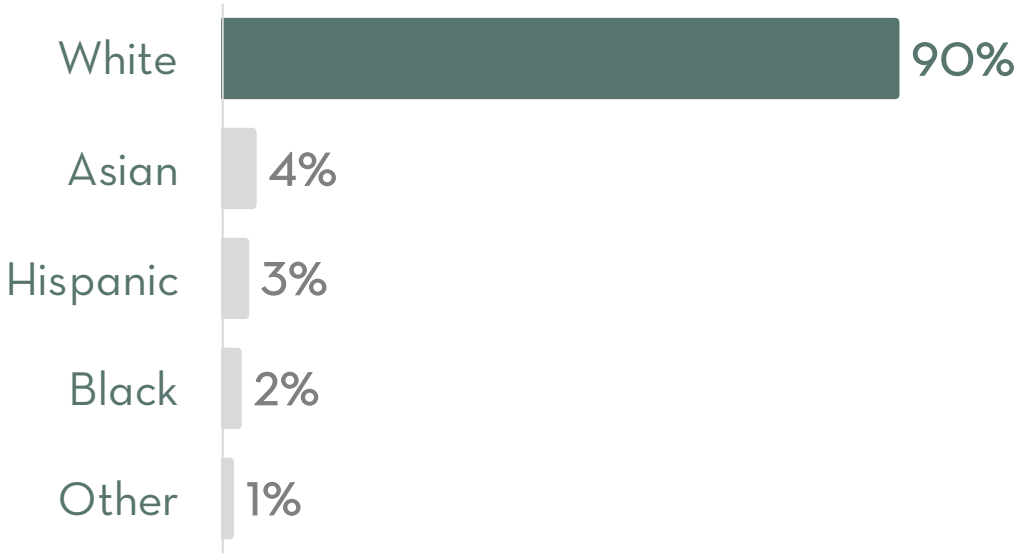
EMPLOYMENT STATUS

» 7 in 10 visitors to the Maine Beaches were employed, most full-time



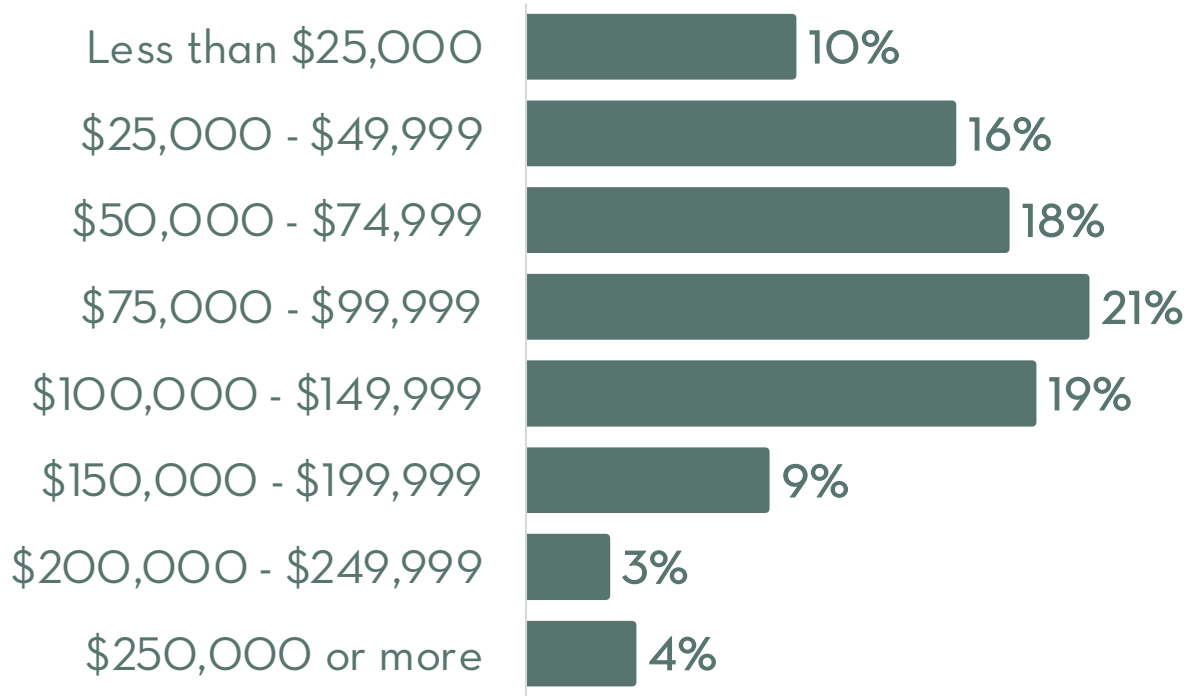
RACE & ETHNICITY

» 9 in 10 visitors to the Maine Beaches were White/Caucasian



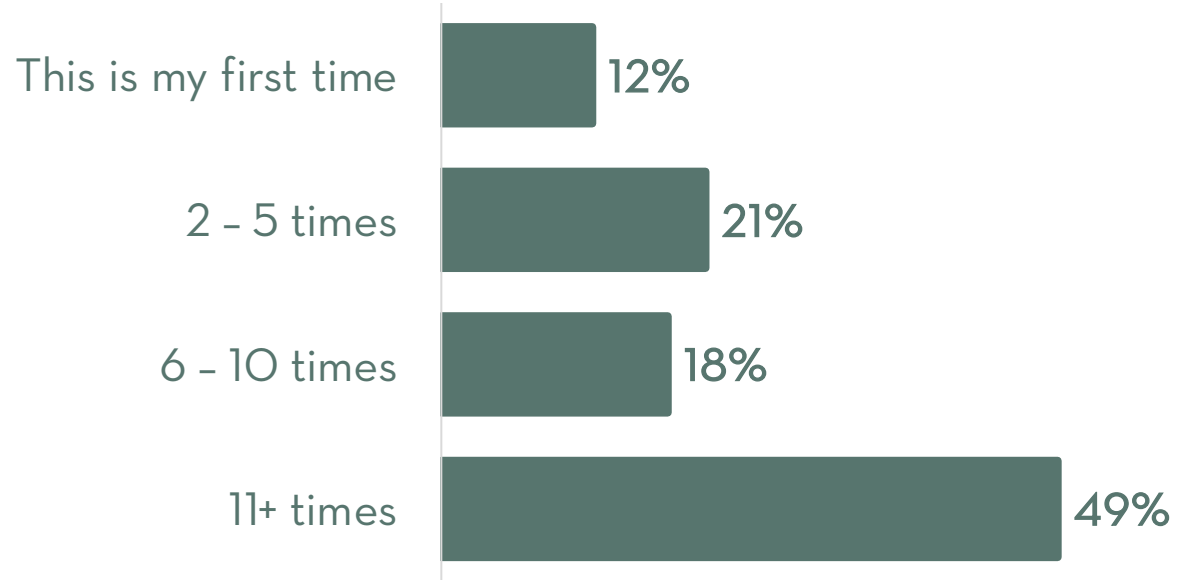
HOUSEHOLD INCOME

- Typical visitors to the Maine Beaches earned **$82,100** per year in household income
- **16%** of visitors to the Maine Beaches have household incomes that exceed $150,000



NEW & RETURNING VISITORS

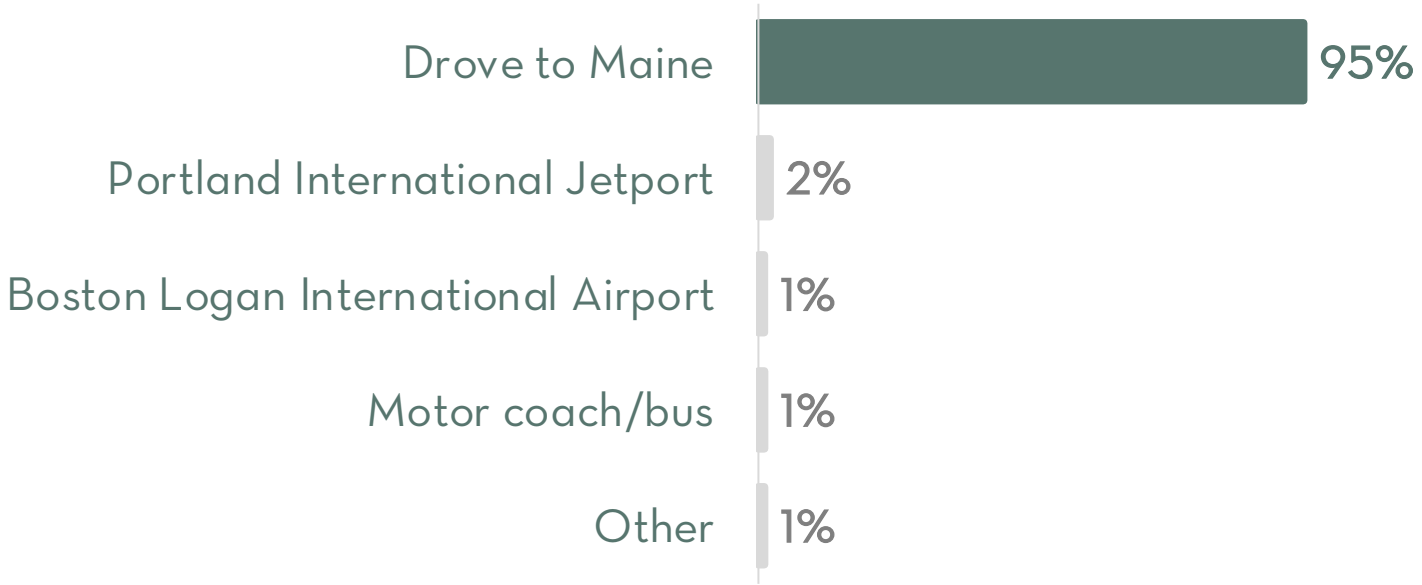
- 12% of visitors to the Maine Beaches were traveling in Maine for the first time
- Half of visitors to the Maine Beaches had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE

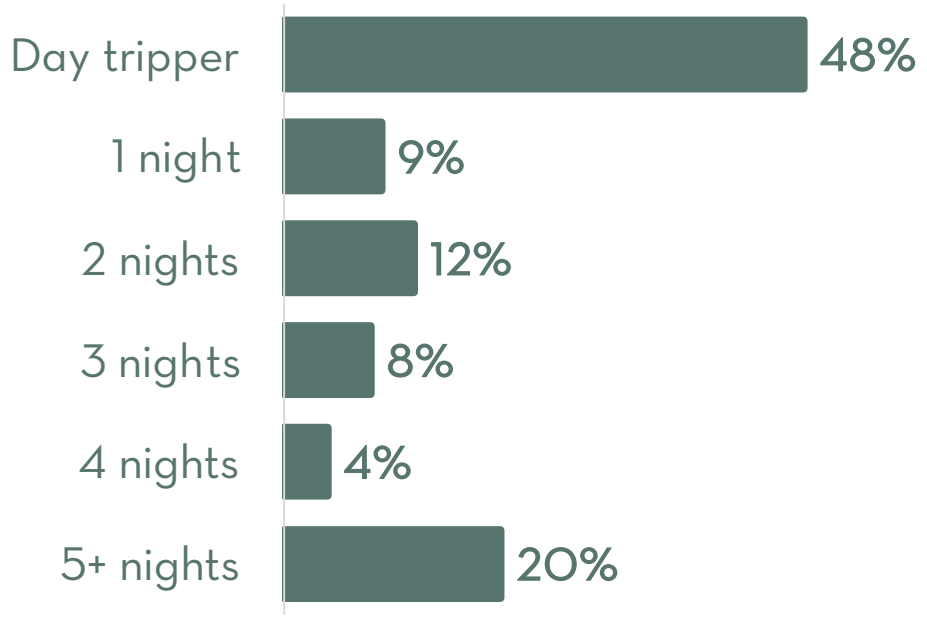
MODES OF TRANSPORTATION

- The Maine Beaches is a drive-market as **95%** choose to travel by car rather than by plane, motor coach/bus, or train
- **Most** visitors to the Maine Beaches who flew to Maine arrived at Portland International Jetport



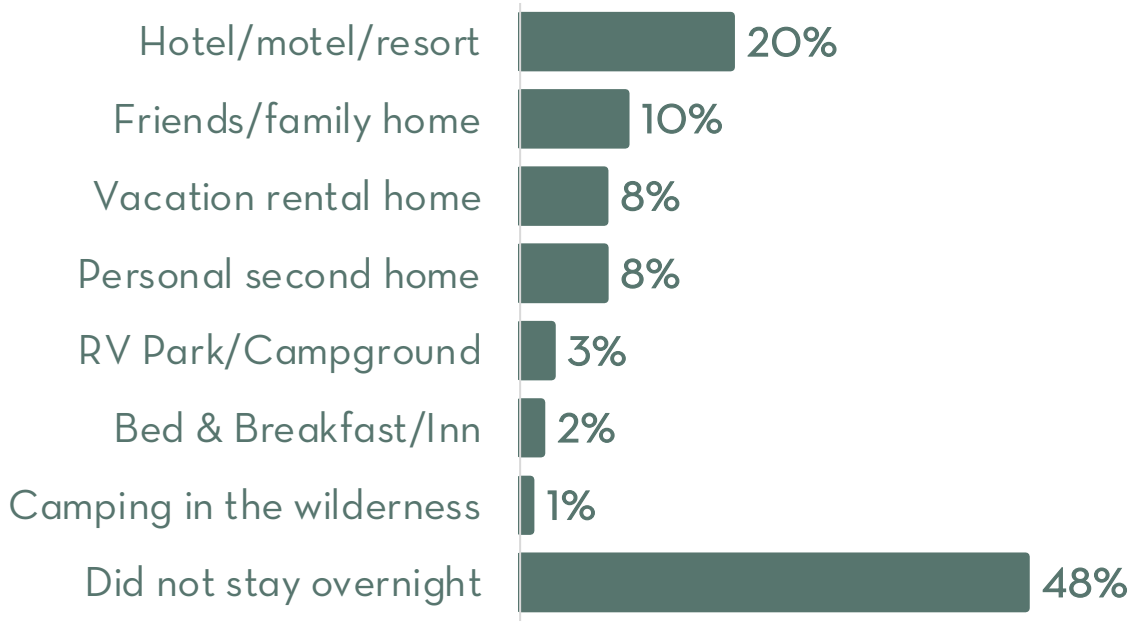
NIGHTS STAYED

- Half of the visitors to the Maine Beaches stayed one night or more during their trip
- Typical visitors to the Maine Beaches stayed 4.0 nights
- 20% of visitors to the Maine Beaches stayed 5 or more nights



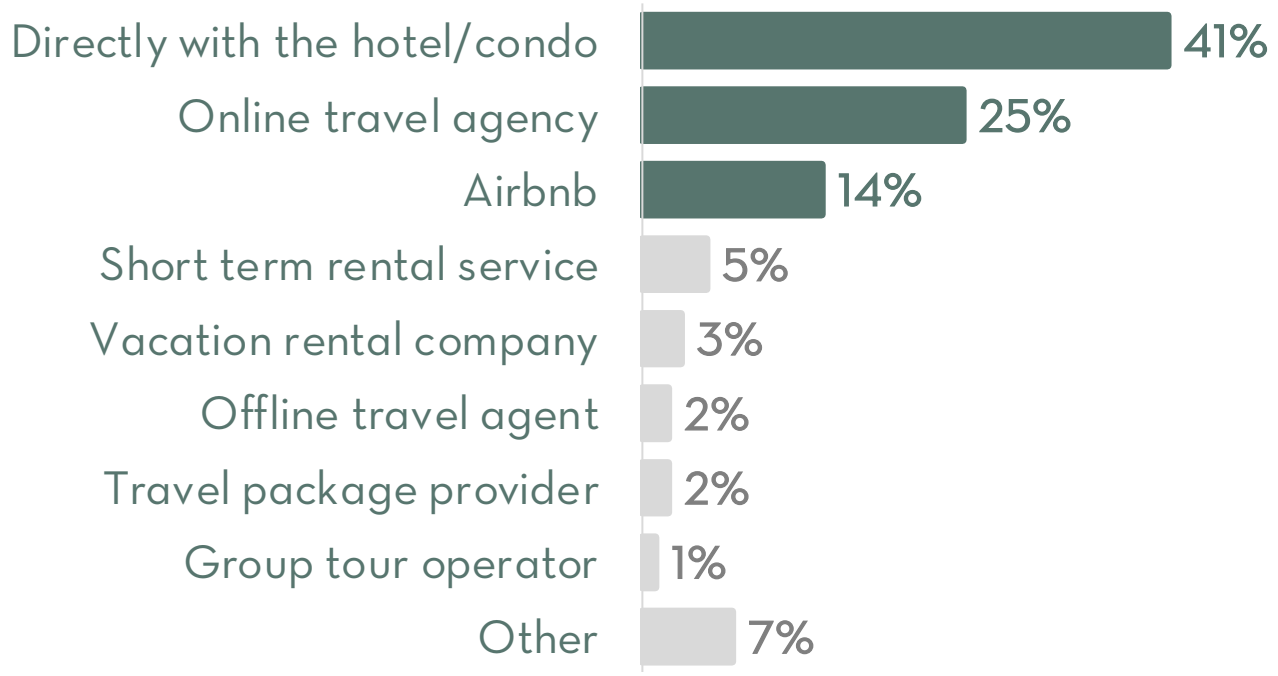
ACCOMMODATIONS

- 1 in 5 visitors to the Maine Beaches stayed overnight in a hotel, motel, or resort
- 10% of visitors to the Maine Beaches stayed overnight with friends or relatives



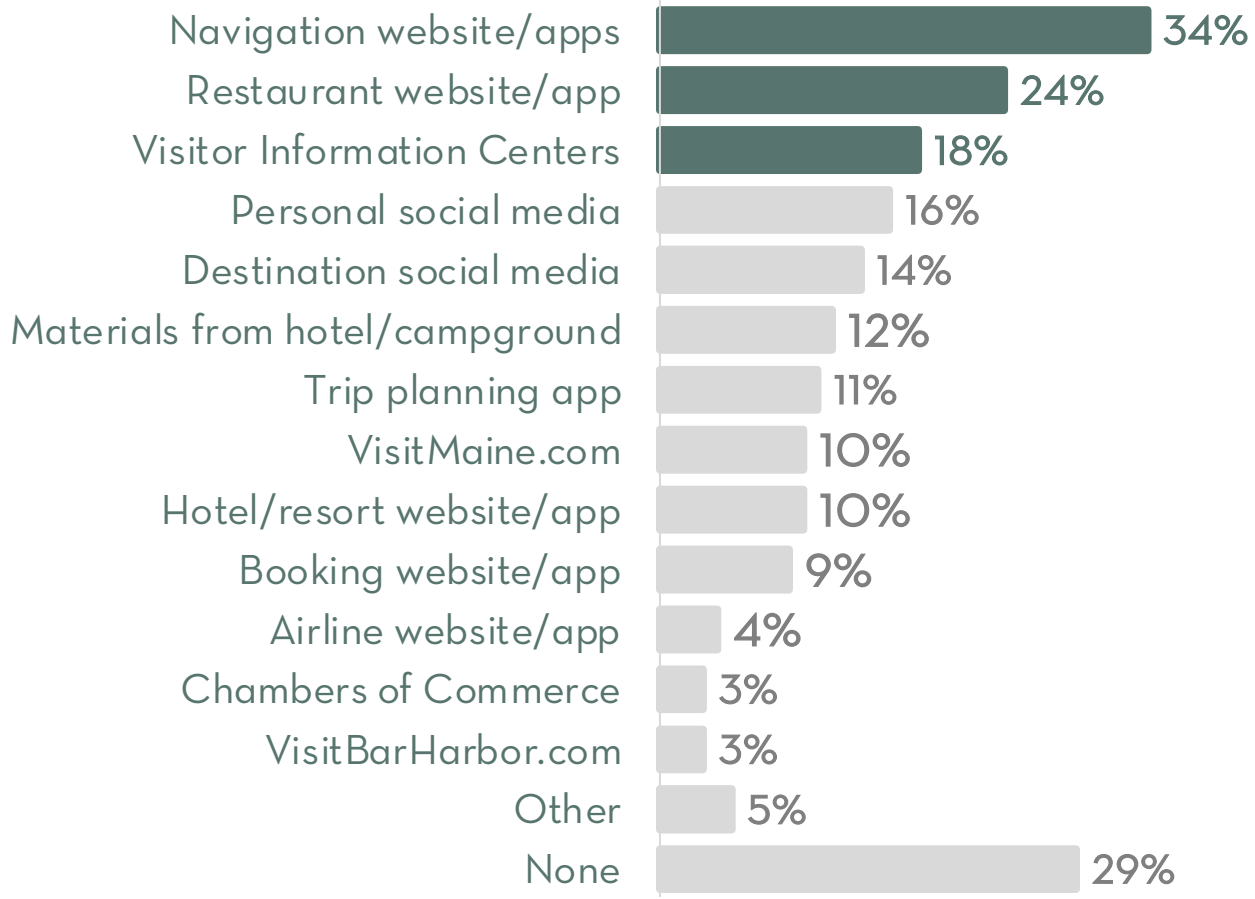
BOOKING METHODS

- 34% of visitors to the Maine Beaches stayed overnight in paid accommodations during their trip
- 2 in 5 visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



IN-MARKET VISITOR RESOURCES*

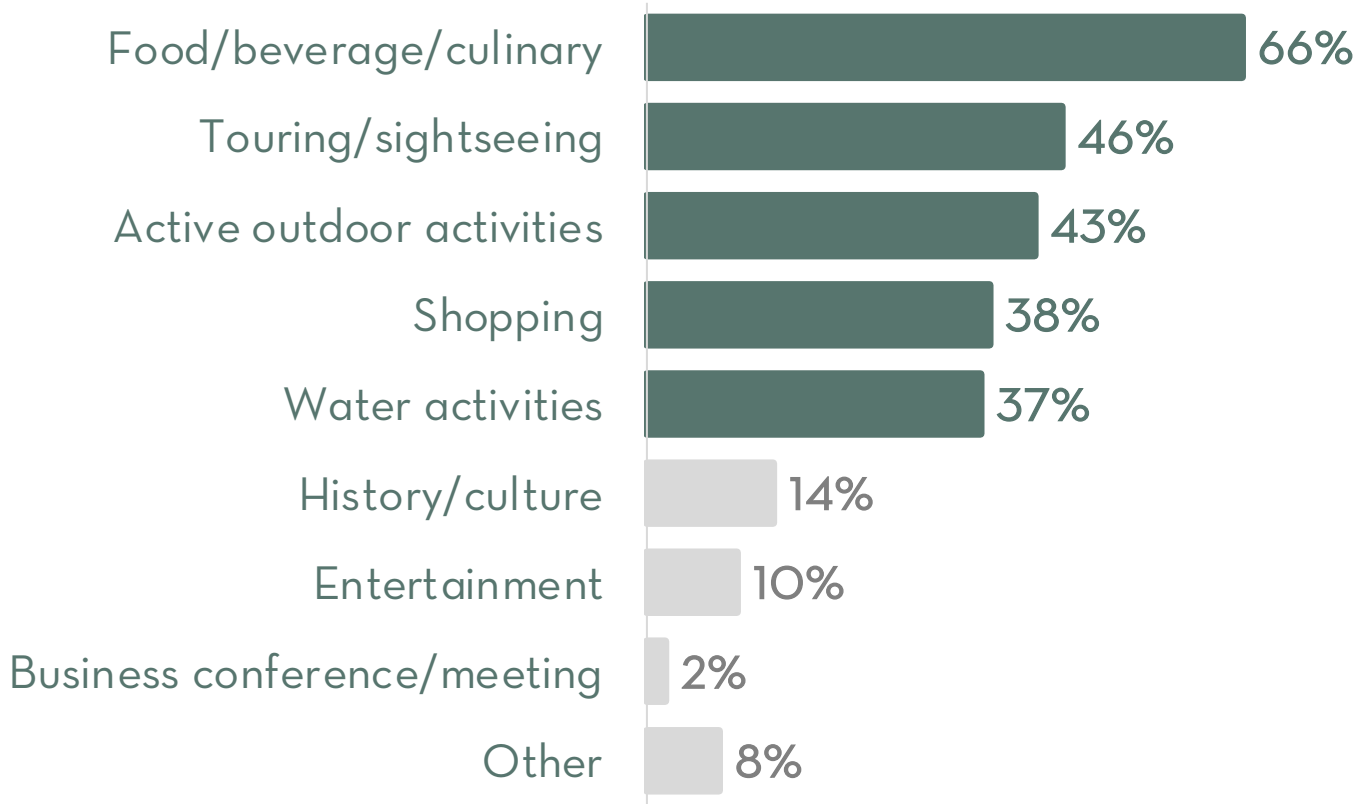
- 1 in 3 visitors used navigation websites and apps to plan activities during their trip to the Maine Beaches
- 3 in 10 visitors did not use any resources to plan activities while they were in the Maine Beaches



*Multiple responses permitted.

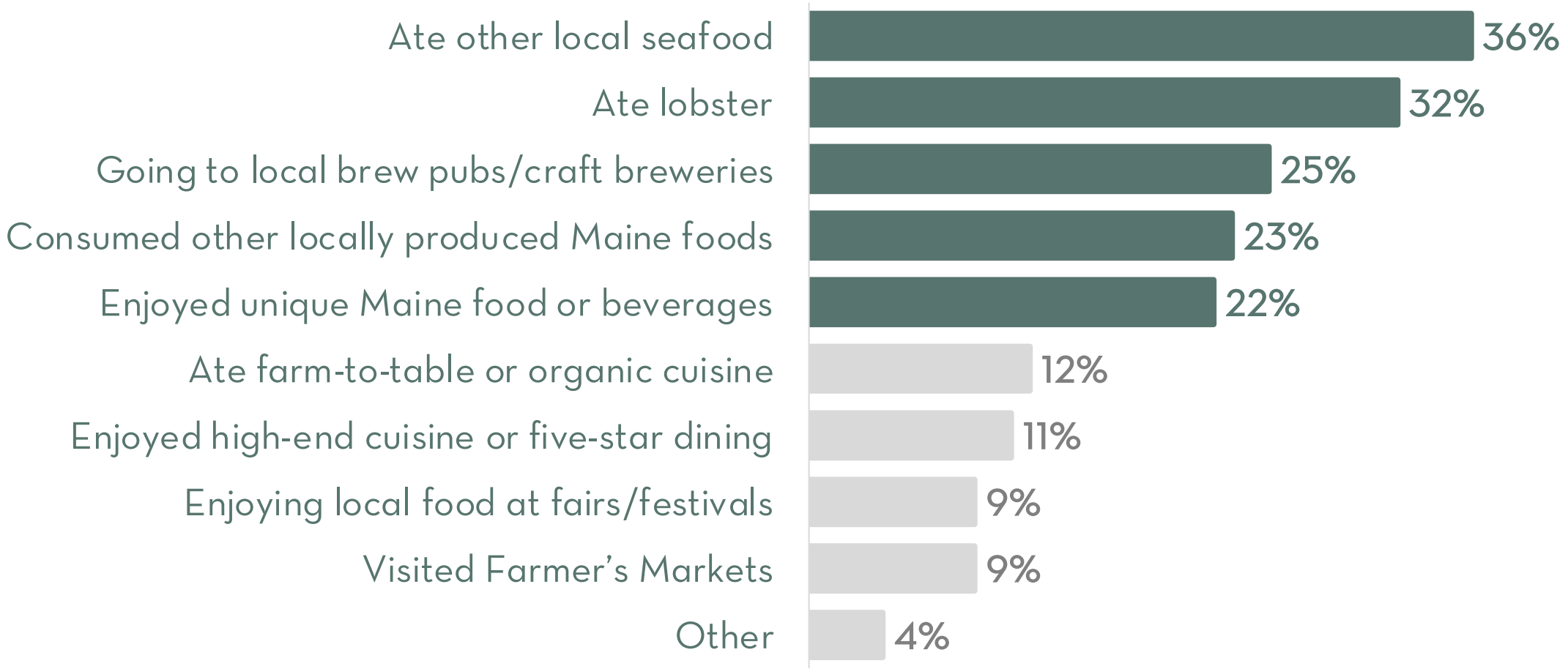
VISITOR ACTIVITIES*

- 2 in 3 of visitors participated in food, beverage, and culinary activities during their trip in the Maine Beaches
- 46% of visitors to the Maine Beaches engaged in sightseeing/touring activities during their trip



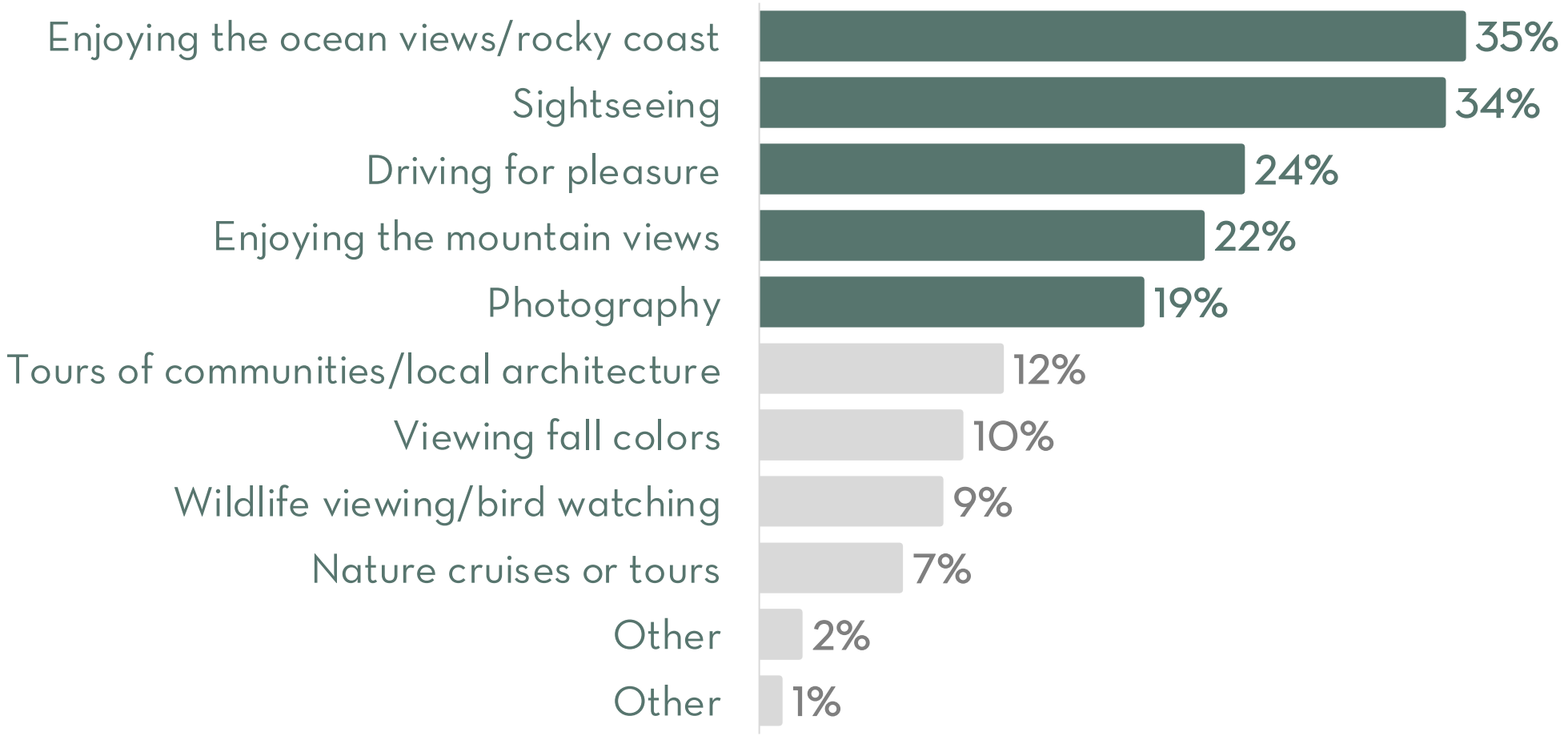
*Multiple responses permitted.

FOOD & BEVERAGE ACTIVITIES*



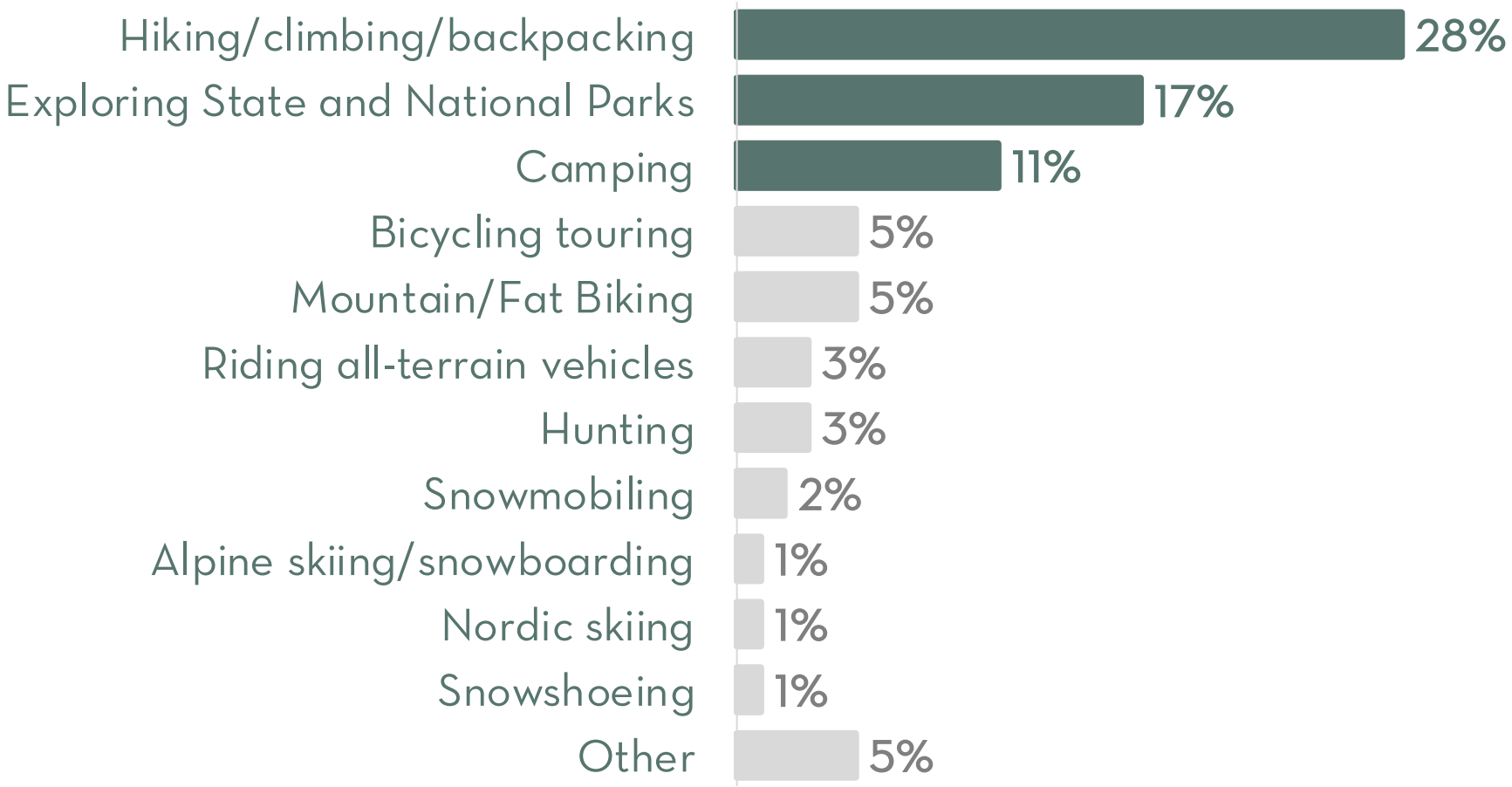
*Multiple responses permitted.

TOURING & SIGHTSEEING ACTIVITIES*



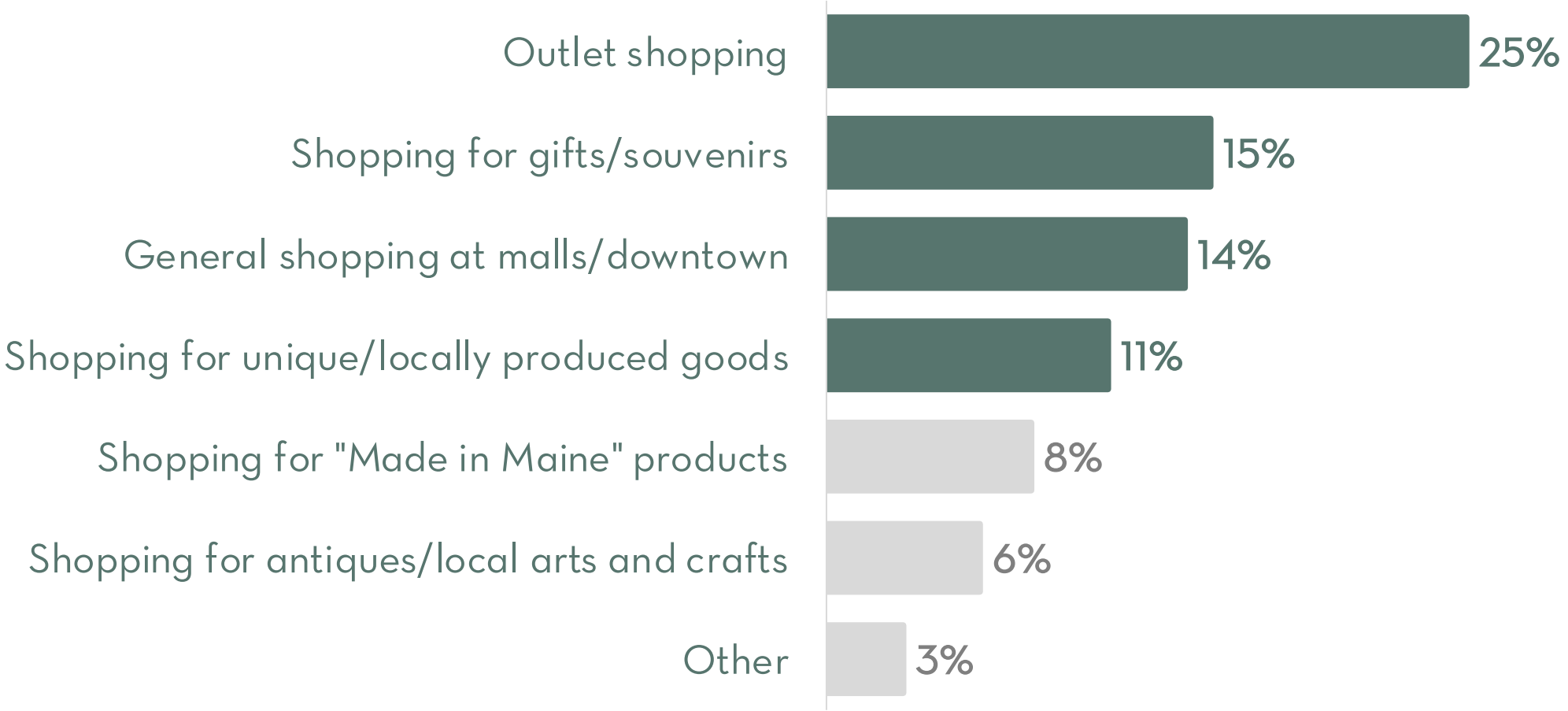
*Multiple responses permitted.

ACTIVE OUTDOOR ACTIVITIES*



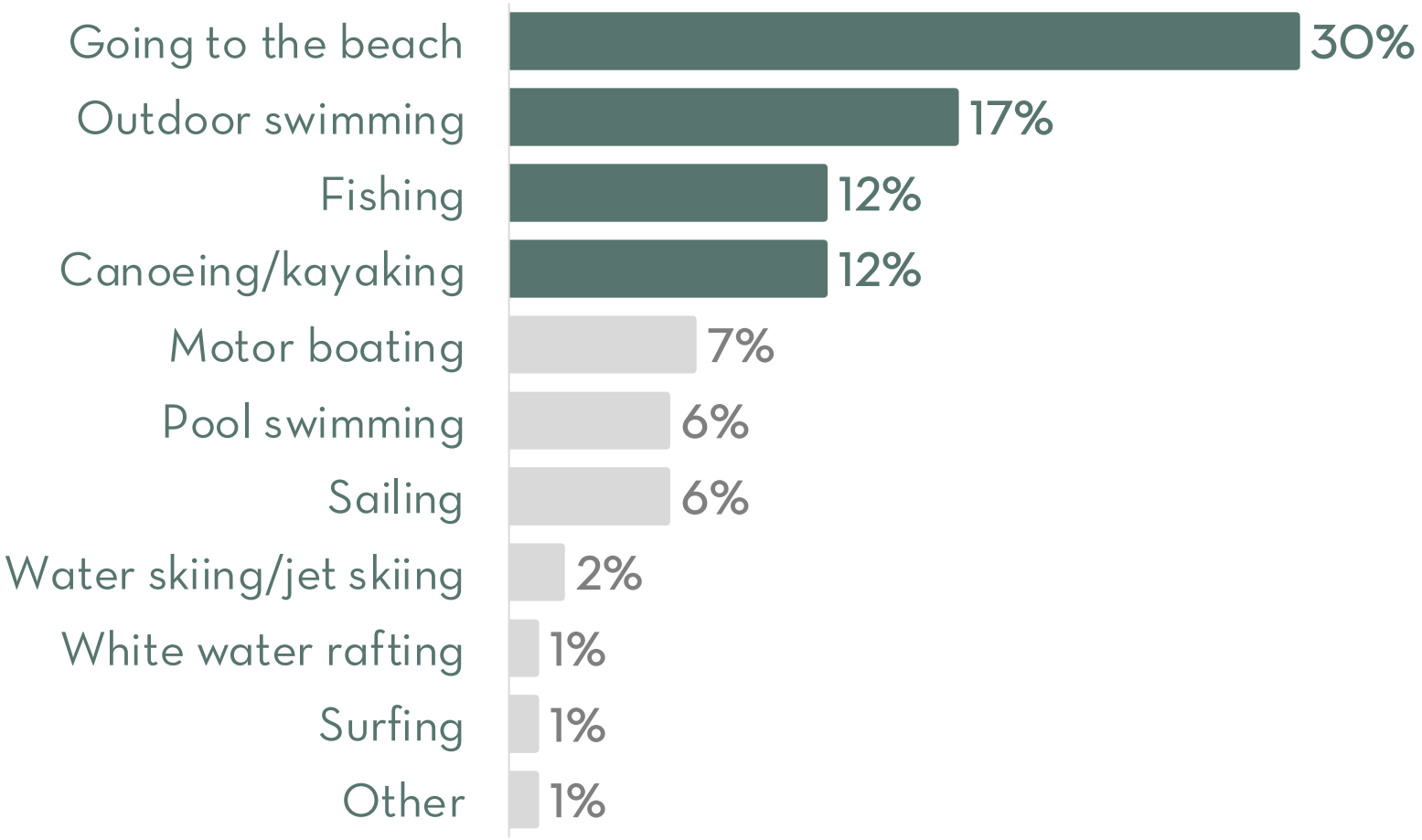
*Multiple responses permitted.

SHOPPING ACTIVITIES*



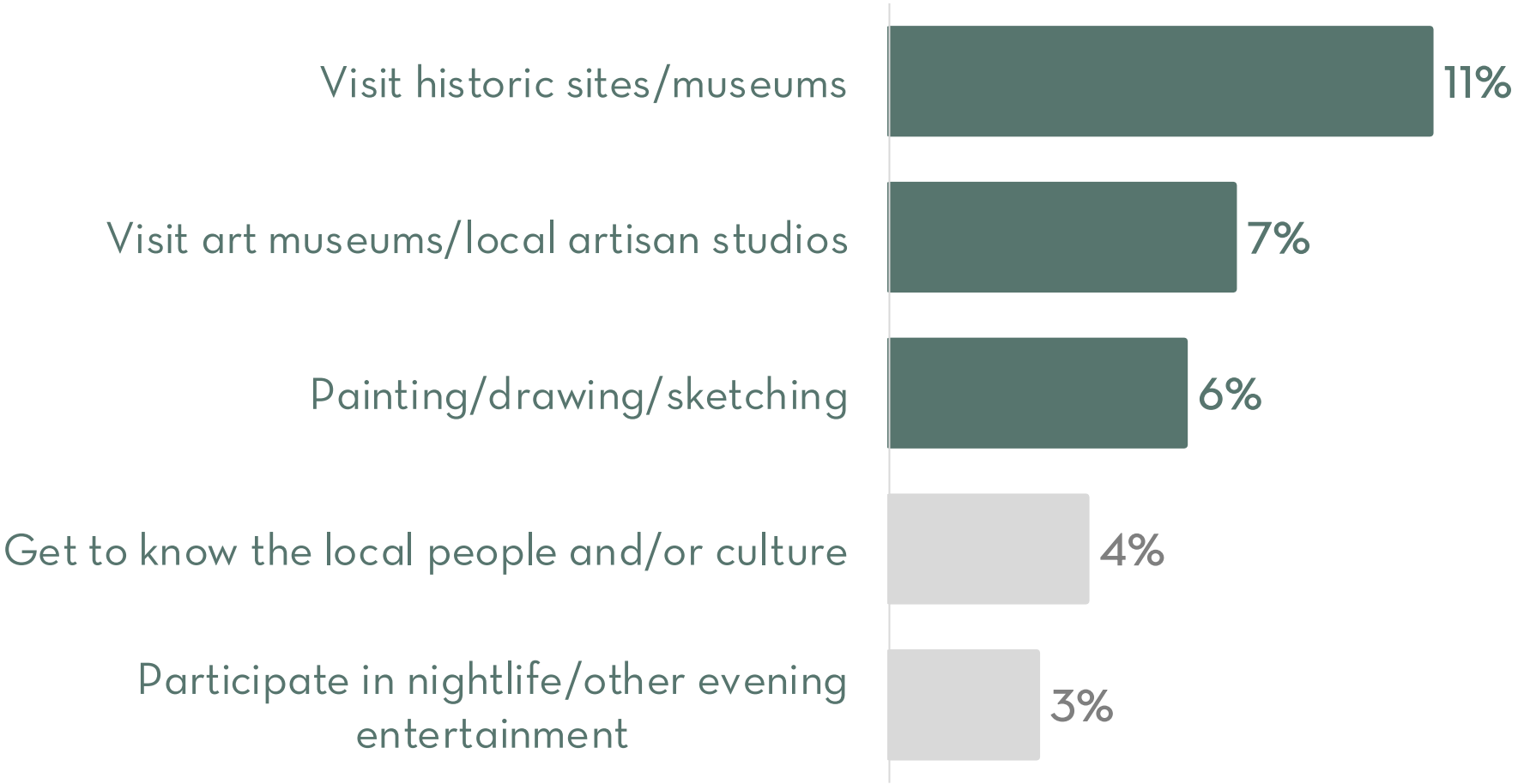
*Multiple responses permitted.

WATER ACTIVITIES*



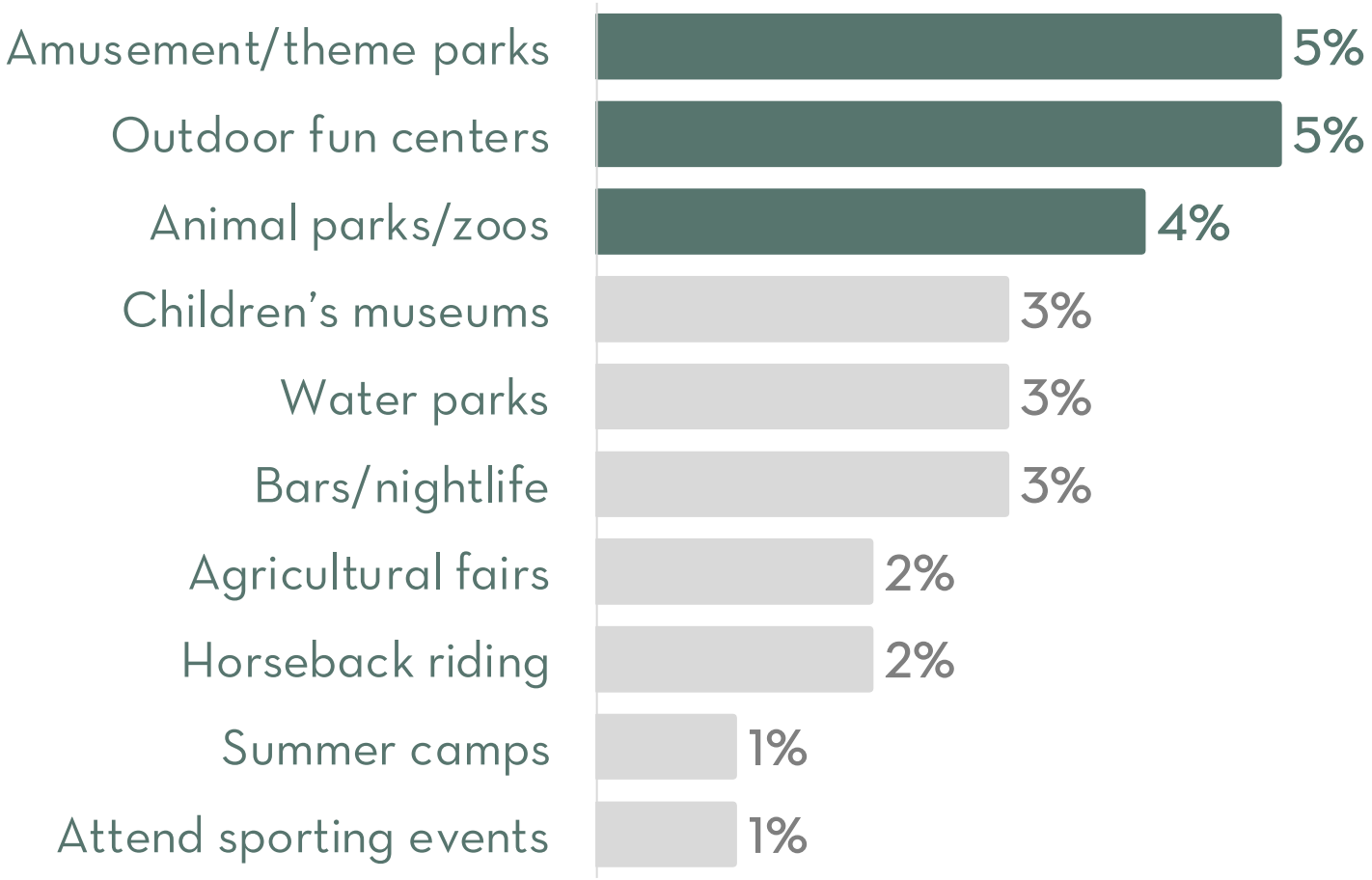
*Multiple responses permitted.

HISTORICAL & CULTURAL ACTIVITIES*



*Multiple responses permitted.

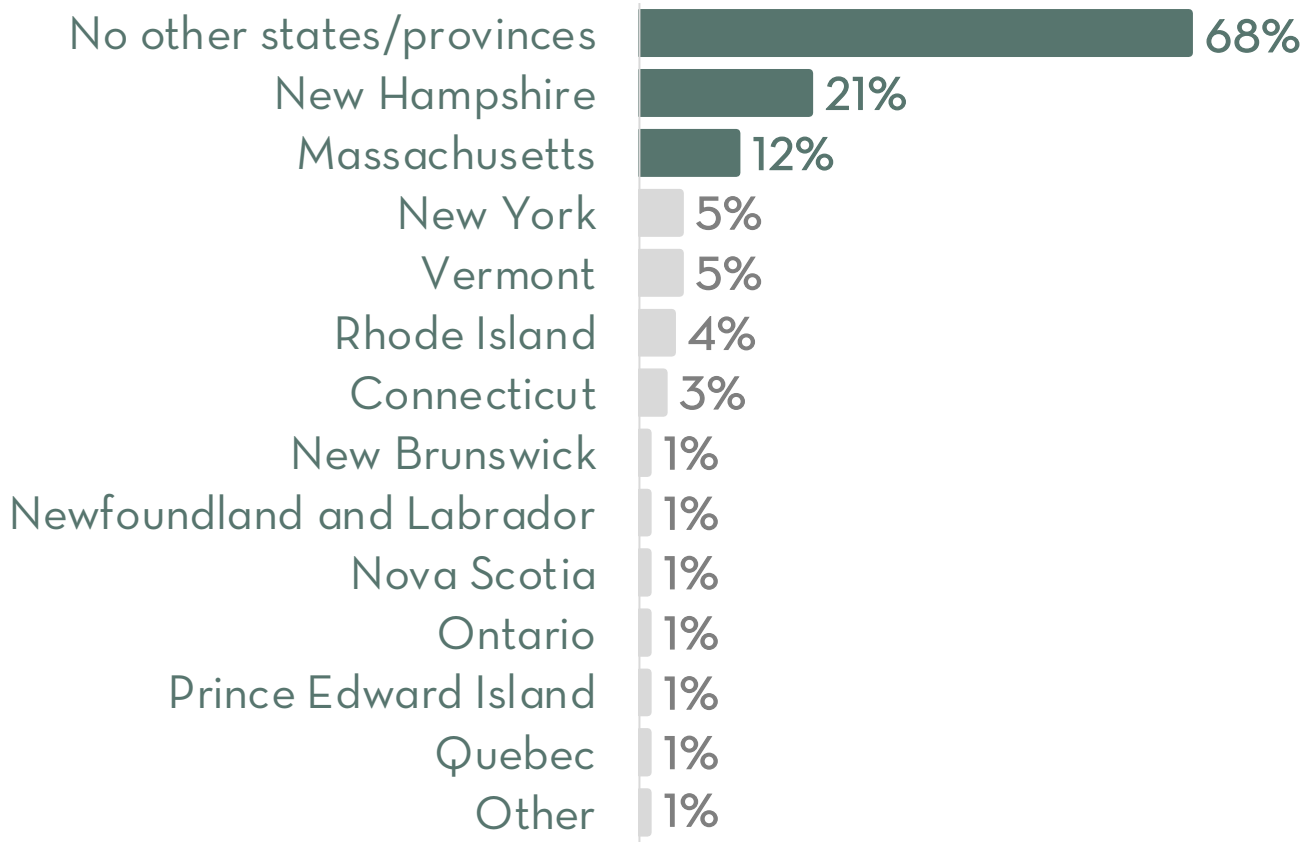
ENTERTAINMENT ACTIVITIES*



*Multiple responses permitted.

OTHER STATES & PROVINCES VISITED*

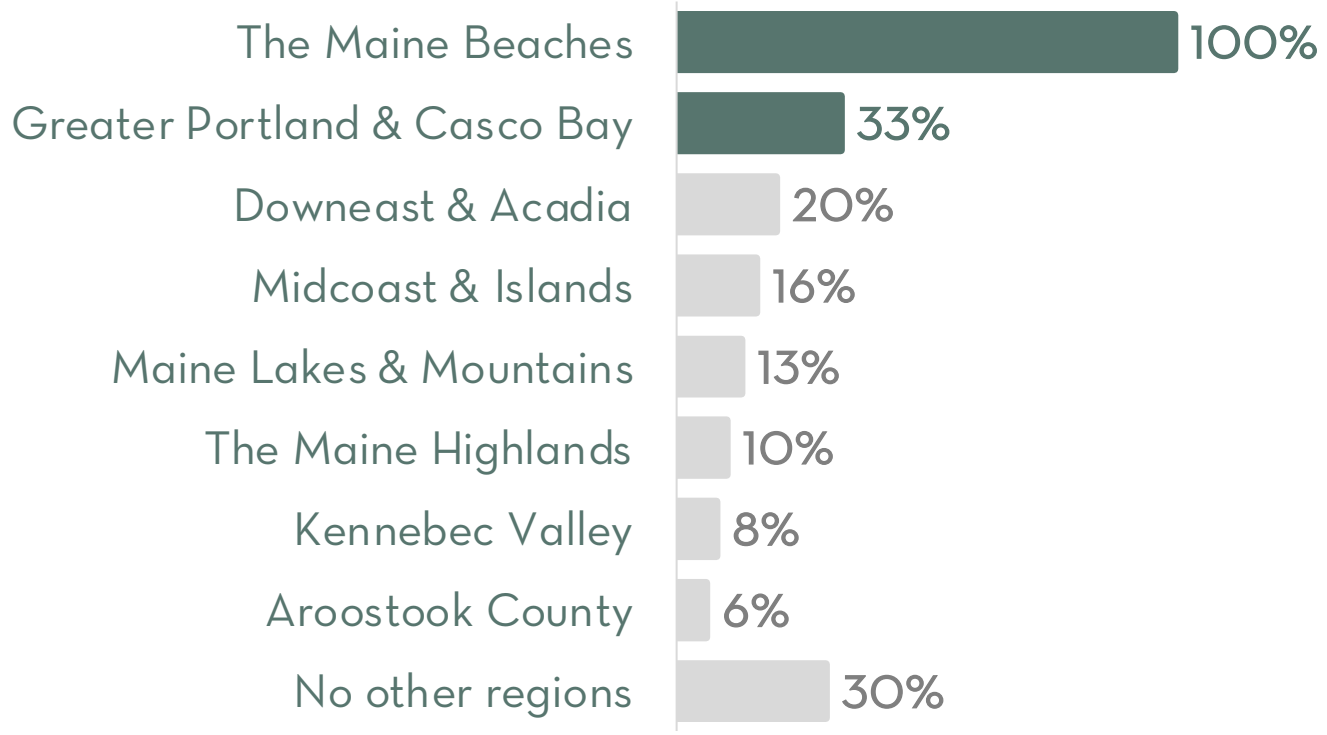
- 2 in 3 visitors did not visit any other U.S. state or Canadian province on their trip to the Maine Beaches
- Visitors to the Maine Beaches were **more likely** to visit U.S. states near Maine than they were to visit a Canadian province during their trip



*Multiple responses permitted.

REGIONS VISITED WITHIN MAINE*

- 3 in 10 visitors stayed within the Maine Beaches during their trip in Maine, rather than traveling throughout the state
- 1 in 3 visitors to the Maine Beaches also visited Greater Portland & Casco Bay during their trip in Maine



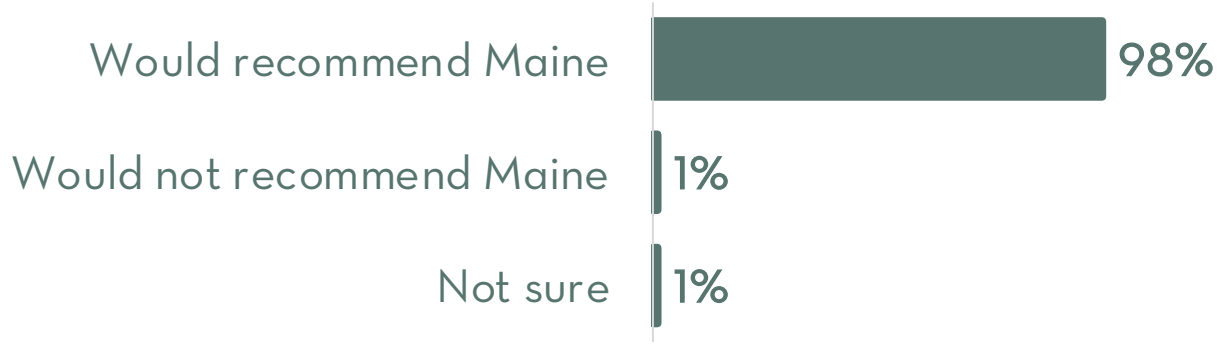
*Multiple responses permitted.

TRIP PLANNING CYCLE : POST-TRIP EVALUATION

RECOMMENDING MAINE & ITS REGIONS

» **98%** of visitors to the Maine Beaches would recommend that their friends and family visit Maine

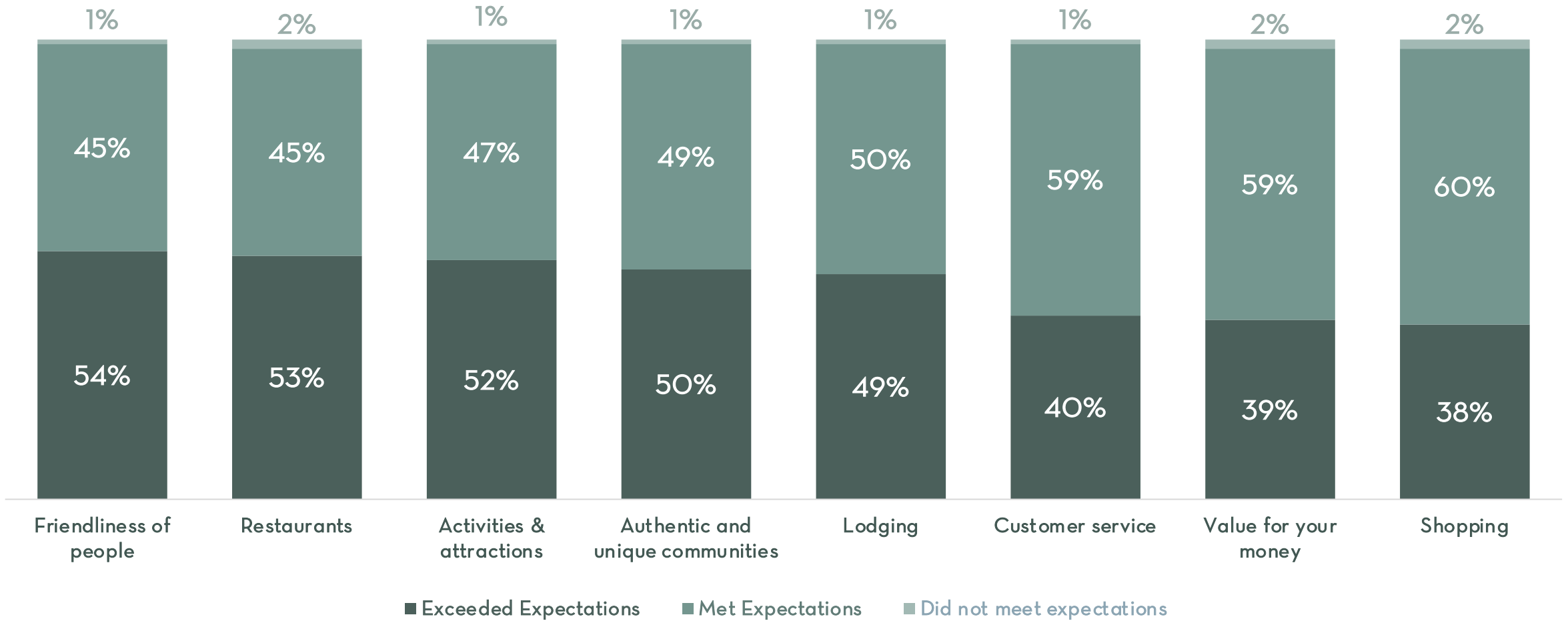
Likelihood of Recommending Maine



» **97%** of visitors would recommend that their friends and family visit the Maine Beaches

Likelihood of Recommending the Maine Beaches

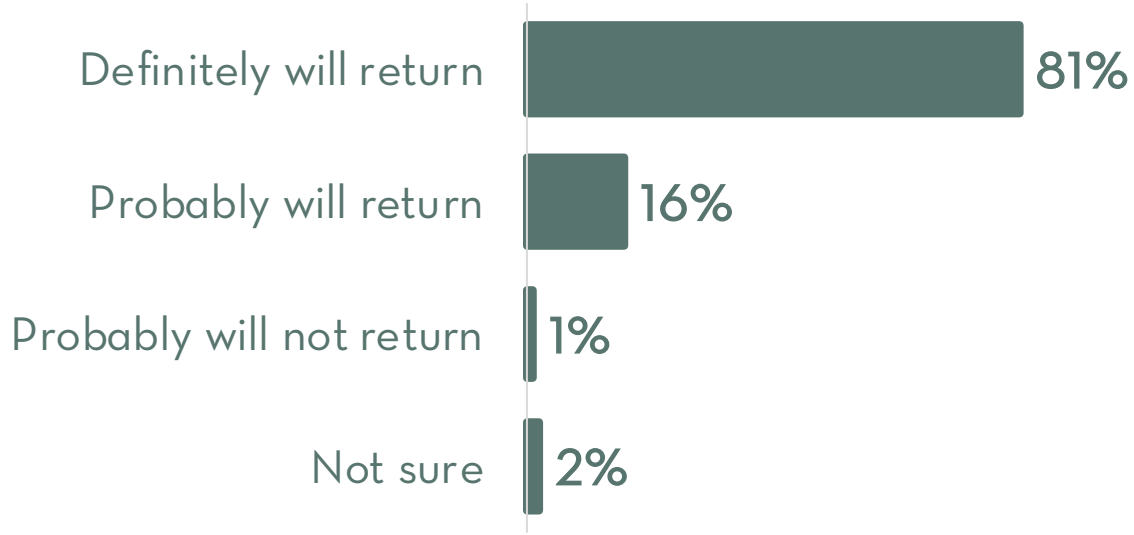
TRIP EXPECTATIONS



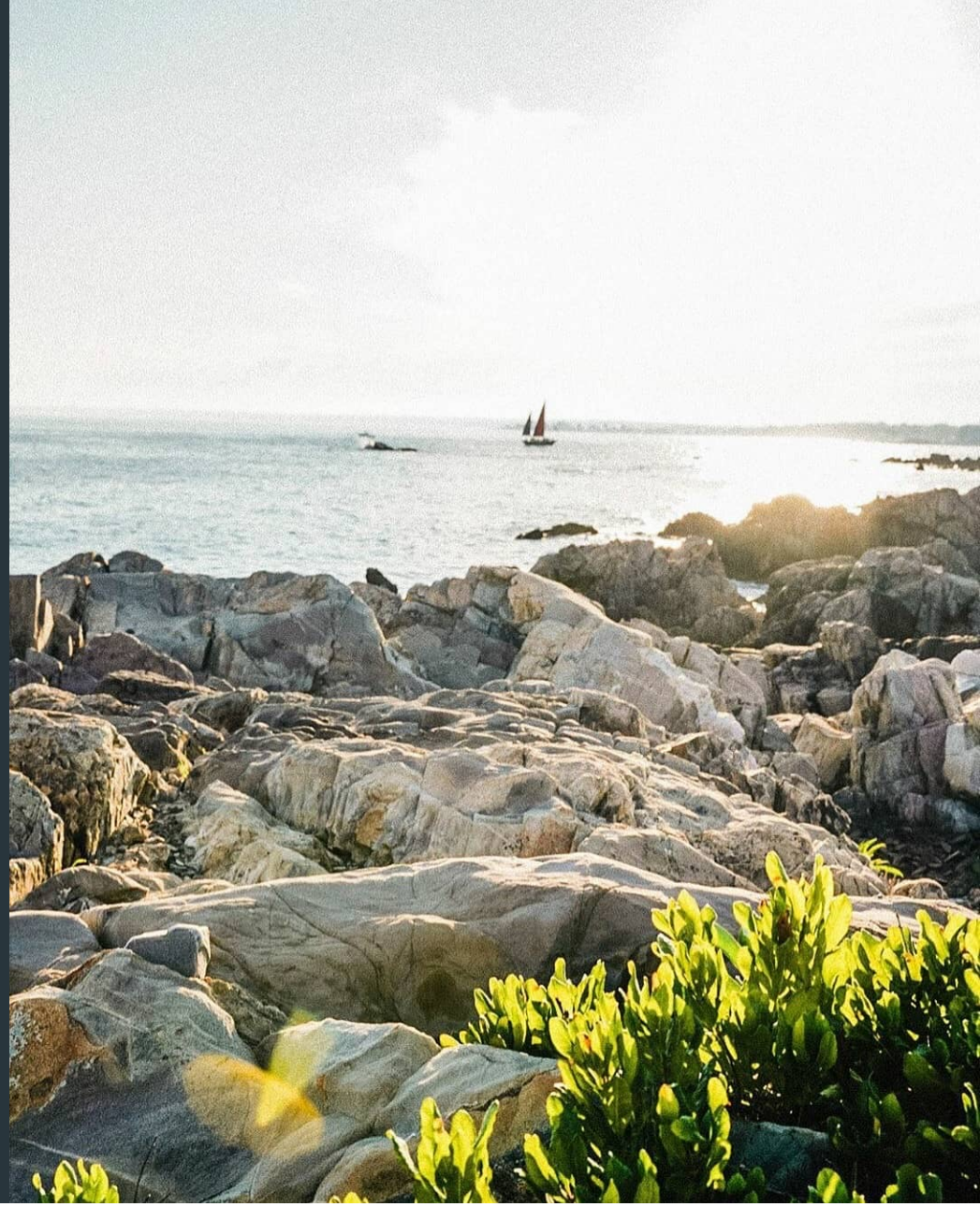
"Don't know" responses omitted.

LIKELIHOOD OF RETURNING TO MAINE

» **97%** of visitors to the Maine Beaches will return to Maine for a future visit or vacation



THE MAINE BEACHES

2020 Visitor Tracking & Economic Impact Report
January – December 2020

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