

THE MAINE HIGHLANDS

2020 Economic Impact & Visitor Tracking Report
January - December 2020

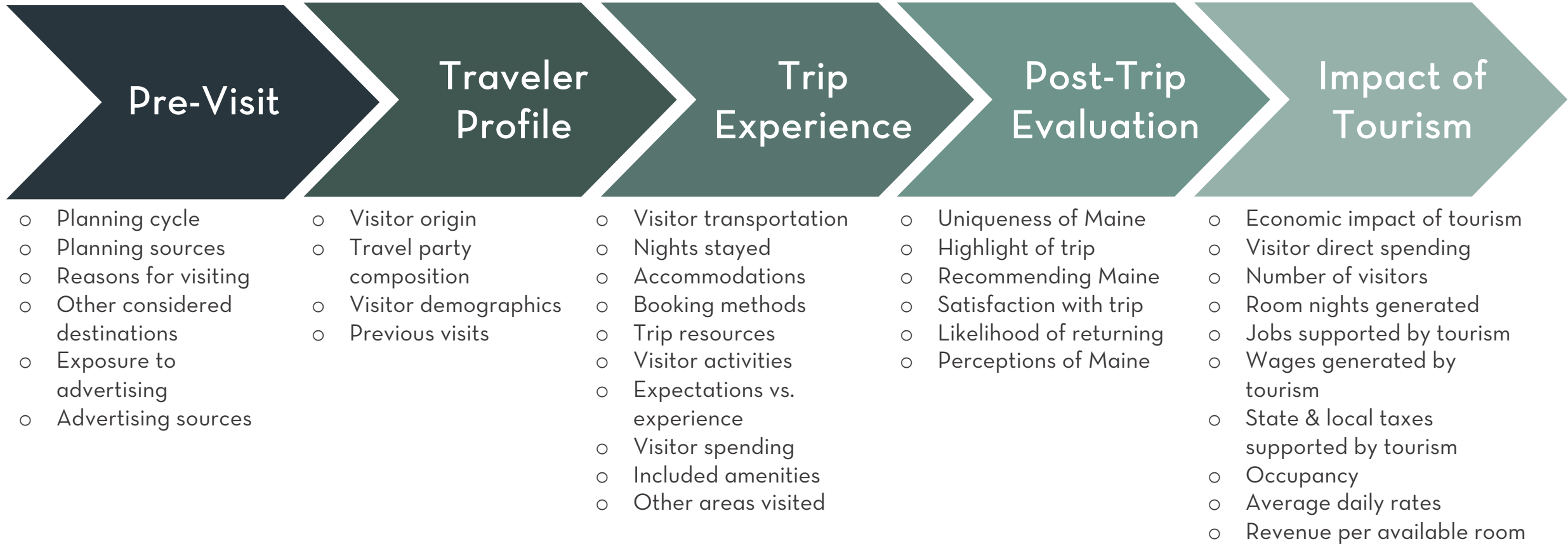


INTRODUCTION



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 **Maine Highlands** region.



METHODOLOGY



Visitor Tracking

601 interviews were completed with visitors to the Maine Highlands 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 the Maine Highlands 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.

THE MAINE HIGHLANDS



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

- » Travel from the Southeastern U.S.
- » See advertising/promotions on social media
- » Fly to Maine

Overall, the profile of visitors to the Maine Highlands region is similar to the statewide profile of visitors to the state of Maine

TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending in 2020 generated
\$598,974,200
in economic impact to the Maine
Highlands region



DIRECT SPENDING

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

\$369,295,100

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



VISITORS

The Maine Highlands attracted

708,700

visitors in 2020



ROOM NIGHTS

Visitors to the Maine Highlands
region generated

627,300

room nights in paid
accommodations in 2020



JOBS SUPPORTED

The total economic impact of tourism
in the Maine Highlands supported

6,900

jobs in the region in 2020



WAGES GENERATED

Tourism in the Maine Highlands supported

\$210,998,200

in wages and salaries in 2020

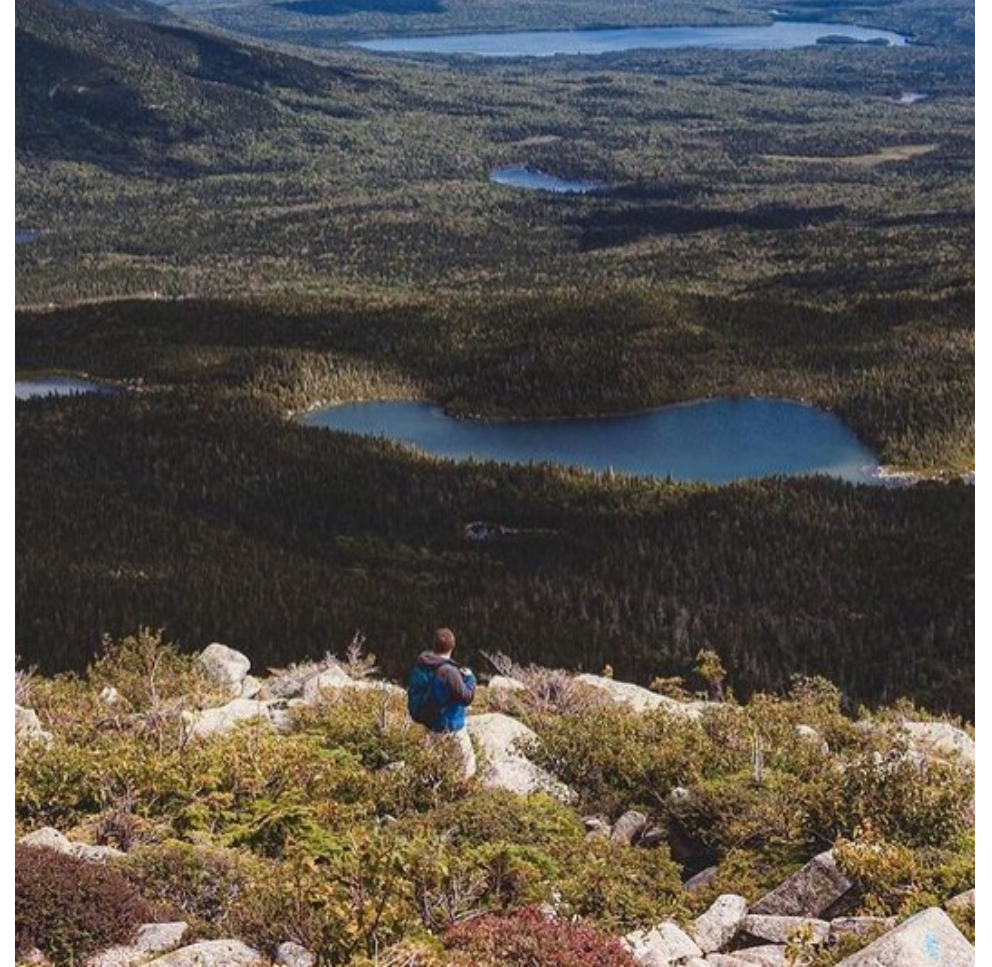


VISITORS CREATE JOBS

A Maine Highlands job is
supported by every

103

visitors



HOUSEHOLD SAVINGS

Visitors to the Maine Highlands
saved local residents

\$886

in taxes per household in 2020



LODGING METRICS

<i>Lodging Metrics</i>	<i>2020</i>
<i>Occupancy (%)</i>	<i>35.4%</i>
<i>Average Daily Rate</i>	<i>\$96.82</i>
<i>Revenue per Available Room</i>	<i>\$34.27</i>
<i>Total Accommodations Revenue</i>	<i>\$60,734,200</i>

TRIP PLANNING CYCLE : PRE-VISIT



TRIP PLANNING CYCLE

- » 38% of visitors started planning their trip to the Maine Highlands less than a month in advance
- » 46% of visitors booked their trip/decided to visit the Maine Highlands less than a month in advance



TOP ONLINE TRIP PLANNING SOURCES*



33% Online search engines



19% Online travel agency



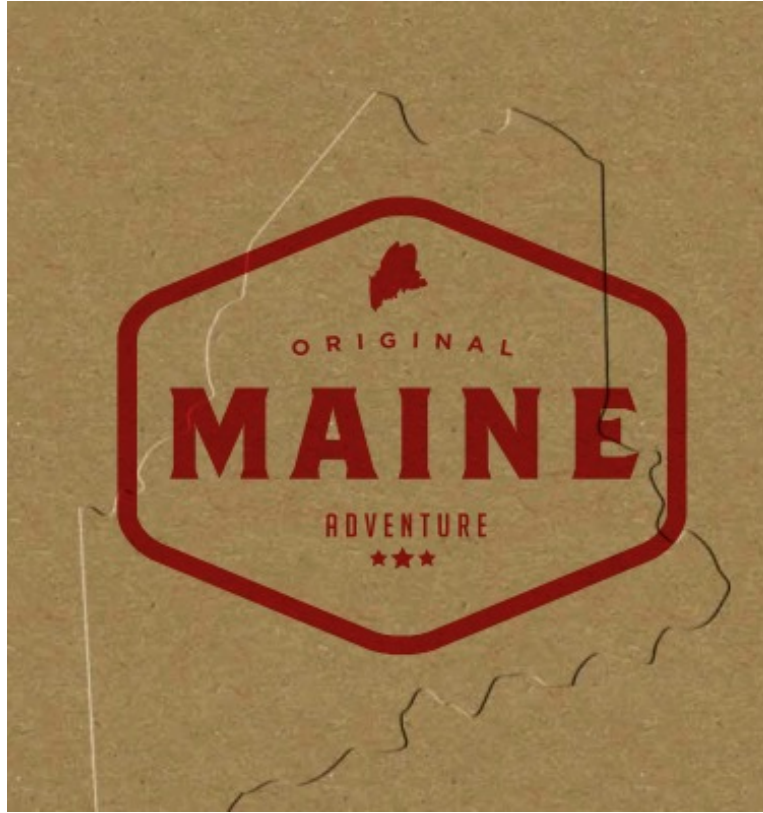
16% Facebook

*Multiple responses permitted.

TOP OTHER TRIP PLANNING SOURCES*



40% Advice from friends/family



11% Travel guides/brochures



10% Travel books & magazines

*Multiple responses permitted.

TOP REASONS FOR VISITING*



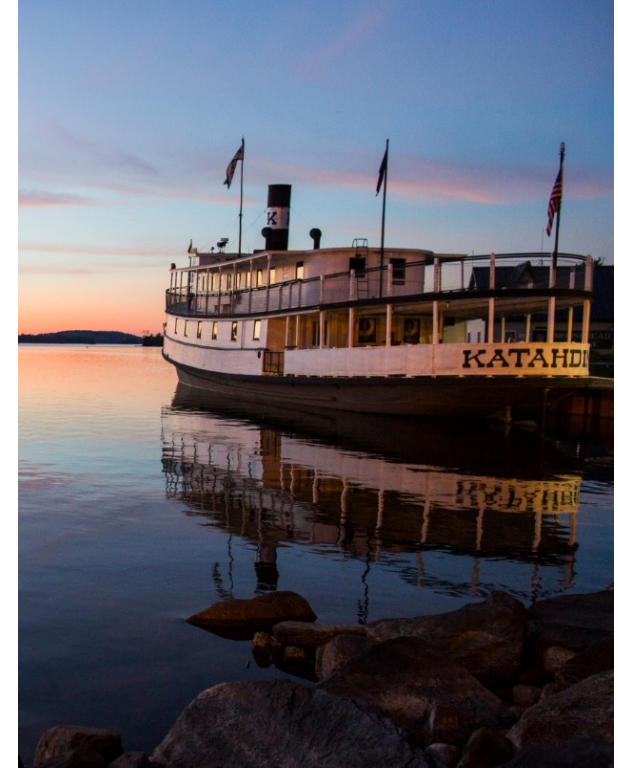
35% Vacation



31% Visiting friends/
relatives



21% Relax and unwind



17% Sightseeing/touring

CONSIDERING MAINE AS A DESTINATION

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



PRE-TRIP EXPOSURE TO ADVERTISING

- » 42% of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to the Maine Highlands



TOP SOURCES OF ADVERTISING EXPOSURE*



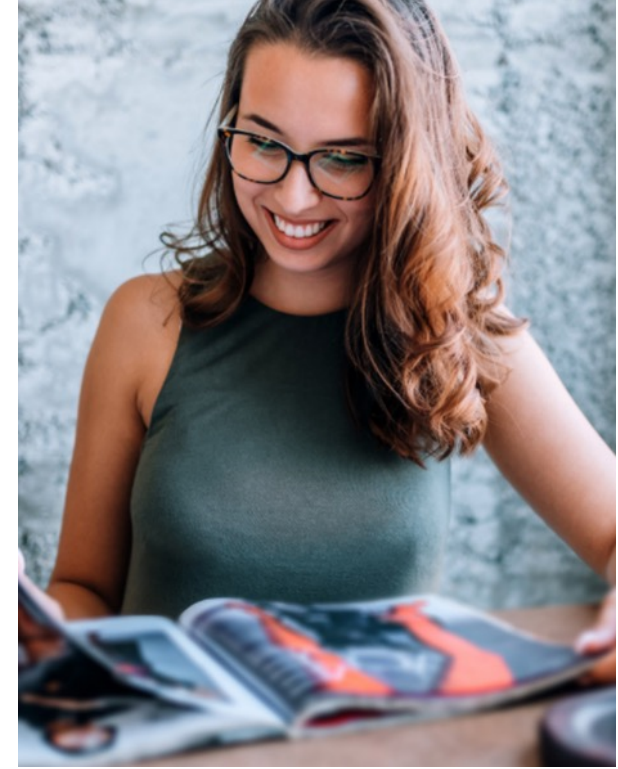
42% Social media



35% Internet



23% Cable or satellite
television



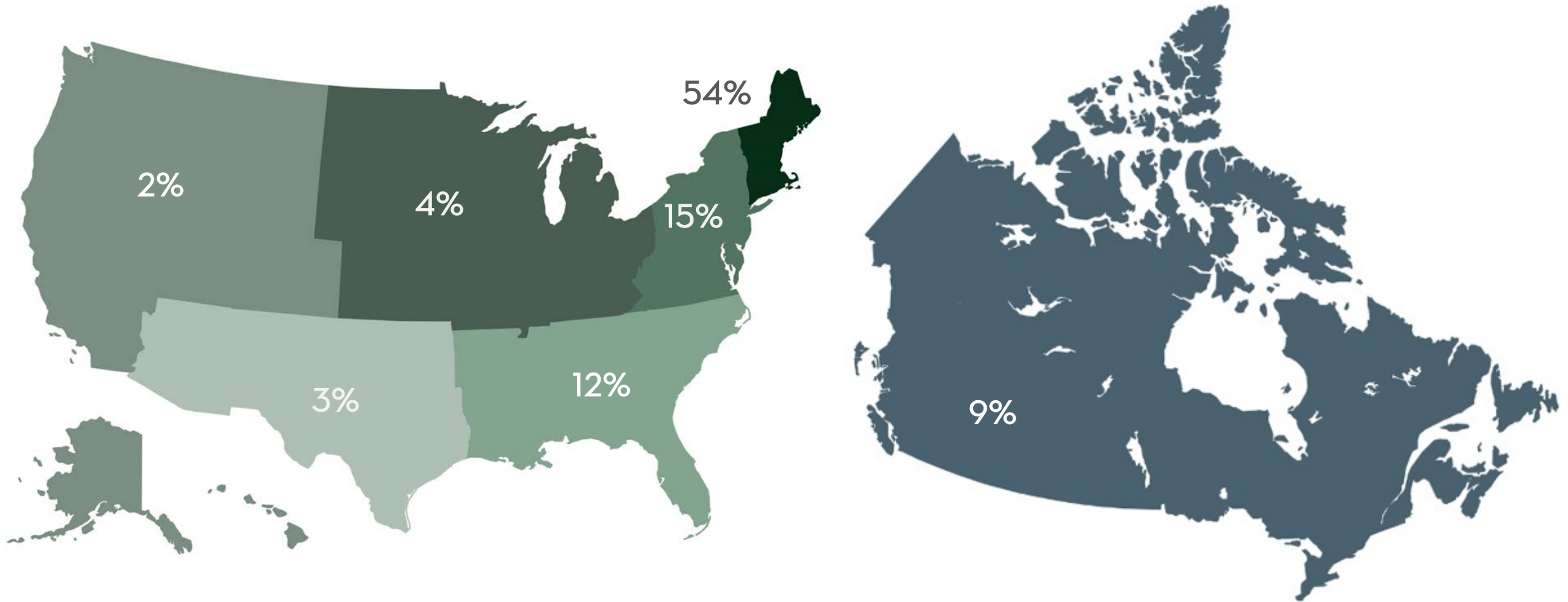
21% Magazine

*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE

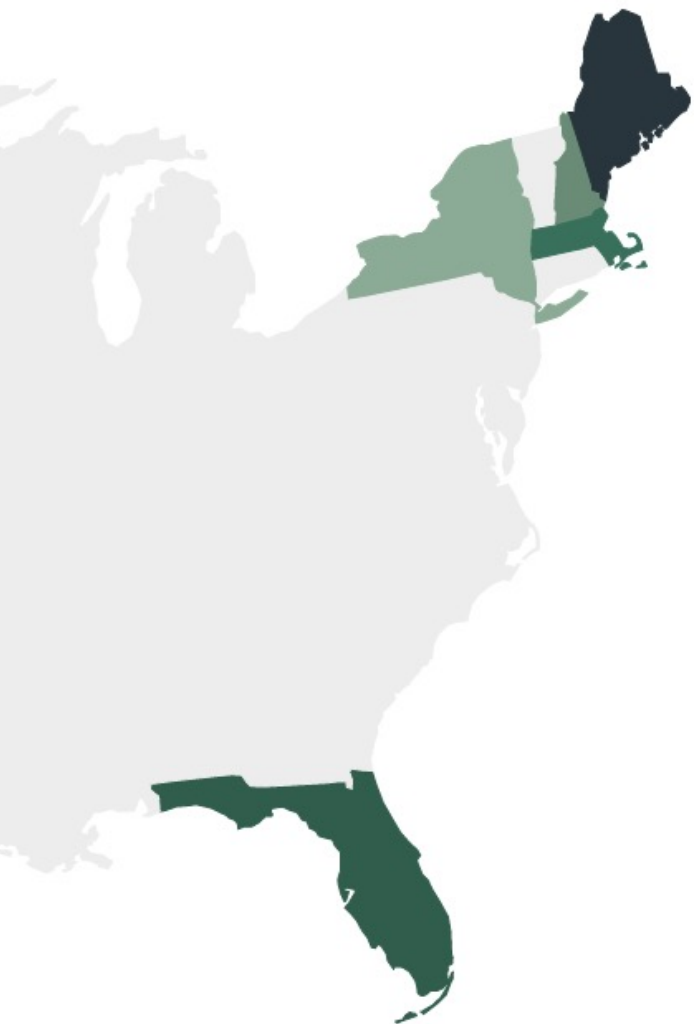


REGIONS OF ORIGIN



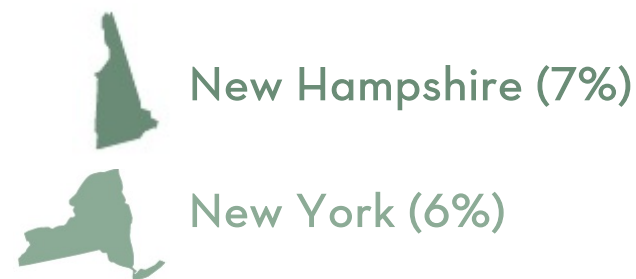
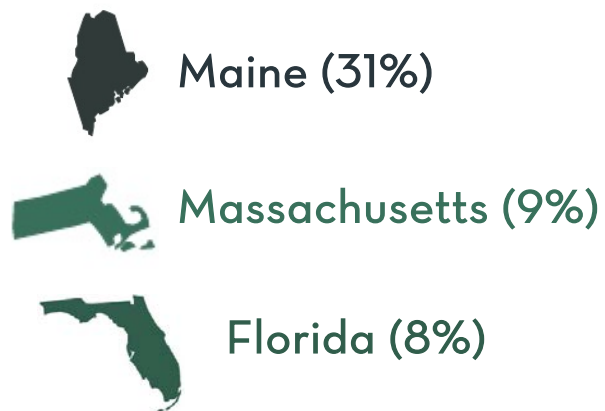
1% of visitors traveled to the Maine Highlands from outside of the U.S. and Canada.

TOP ORIGIN STATES & PROVINCES



61%

of visitors to the Maine Highlands traveled from 5 U.S. states, including from other regions of Maine.



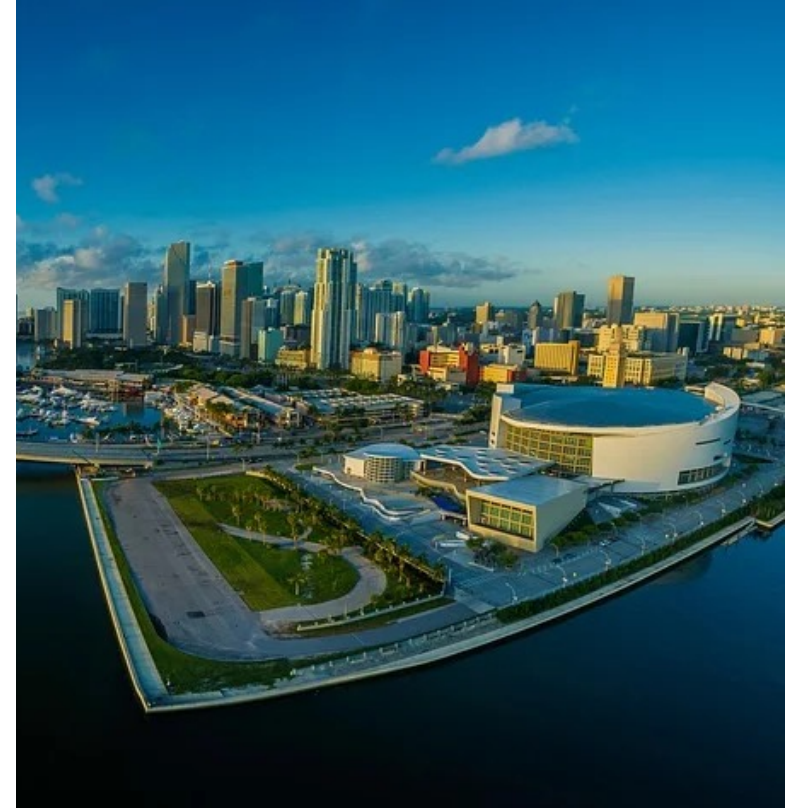
TOP ORIGIN MARKETS



7% New York City, NY



5% Boston, MA



3% Miami-Ft. Lauderdale, FL

TRAVEL PARTIES

The typical visitor to the Maine Highlands traveled with **2.4** 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



51% Female*



69% College/technical graduate



71% Married/domestic partnership



57% Employed full-time



87% White/Caucasian



\$84,200 annual household income

*Of visitors interviewed

VISITOR PROFILE: DAY TRIPPERS

- » The typical day tripper¹:
 - » Earned \$64,200 per year
 - » Was male (52%)
 - » Had a college/technical degree (54%)
 - » Was married or living with their partner (64%)
 - » Was employed full-time (49%)
 - » Was White/Caucasian (90%)
 - » 12% traveled with children
 - » Was from Maine (77%) and other northeastern U.S. states (11%)



¹ Did not stay overnight in the Maine Highlands during their trip.

VISITOR PROFILE: OVERNIGHT VISITORS

- » The typical overnight visitor¹:
 - » Earned \$87,900 per year
 - » Was female (51%)
 - » Had a college/technical degree (71%)
 - » Was married or living with their partner (72%)
 - » Was employed full-time (58%)
 - » Was White/Caucasian (87%)
 - » 21% traveled with children
 - » Was from Maine (21%), other northeastern U.S. states (32%), and the southeast (24%)



¹ Stayed one or more nights in the Maine Highlands during their trip.

NEW & RETURNING VISITORS

- » 23% of visitors to the Maine Highlands were traveling in Maine for the first time
- » 3 in 10 visitors to the Maine Highlands had previously traveled in Maine more than 10 times



TRIP PLANNING CYCLE : TRIP EXPERIENCE



TRANSPORTATION

- » 72% of visitors drove to the Maine Highlands
- » 15% of visitors to the Maine Highlands flew to Maine through Bangor International Airport



NIGHTS STAYED

- » 3 in 4 visitors to the Maine Highlands spent one or more nights
- » Typical visitors to the Maine Highlands stayed 5.8 nights



TOP ACCOMMODATIONS



29% Hotel/motel/resort



17% Friends/family home



26% Did not stay overnight

TOP IN-MARKET VISITOR RESOURCES*



33% Navigation websites/apps



20% Restaurant website/app

*Multiple responses permitted.

TOP VISITOR ACTIVITIES*



67% Food/beverage/culinary



59% Touring/sightseeing



55% Active outdoor activities

*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 the Maine Highlands
- » Visitors to the Maine Highlands 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 visitors traveled to regions other than the Maine Highlands during their trip to Maine
- » 36% of visitors to the Maine Highlands also visited Downeast & Acadia during their trip



TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » 98% of visitors to the Maine Highlands would recommend Maine to a friend or relative as a vacation destination
- » 97% of visitors would recommend the Maine Highlands as a place to visit or vacation



LIKELIHOOD OF RETURNING TO MAINE

» 97% of visitors to the Maine Highlands 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>708,700</i>
<i>Room nights generated</i>	<i>627,300</i>
<i>Direct expenditures</i>	<i>\$369,295,100</i>
<i>Total economic impact</i>	<i>\$598,974,200</i>

IMPACT OF TOURISM

<i>Maine Jobs</i>	<i>2020</i>
<i>Jobs generated (direct)</i>	<i>5,100</i>
<i>Total impact of tourism on Maine jobs</i>	<i>6,900</i>

<i>Maine Wages</i>	<i>2020</i>
<i>Wages paid (direct)</i>	<i>\$140,134,000</i>
<i>Total impact of tourism on Maine wages</i>	<i>\$210,998,200</i>

IMPACT OF TOURISM

<i>Return on Investment</i>	<i>2020</i>
<i>Visitors per job supported</i>	<i>103</i>
<i>State & local taxes supported</i>	<i>\$61,273,700</i>
<i>Tax savings per household</i>	<i>\$886</i>

LODGING METRICS

<i>Lodging Metrics</i>	<i>2020</i>
<i>Occupancy (%)</i>	<i>35.4%</i>
<i>Average Daily Rate</i>	<i>\$96.82</i>
<i>Revenue per Available Room</i>	<i>\$34.27</i>
<i>Total Accommodations Revenue</i>	<i>\$60,734,200</i>

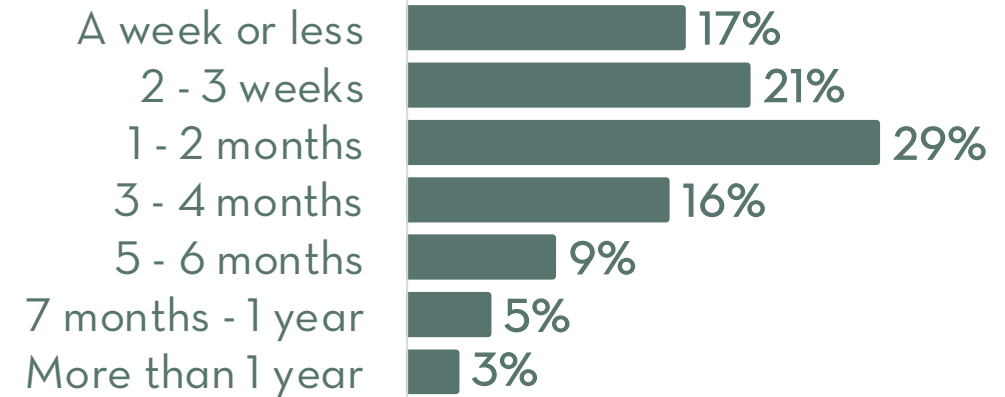
TRIP PLANNING CYCLE : PRE-VISIT



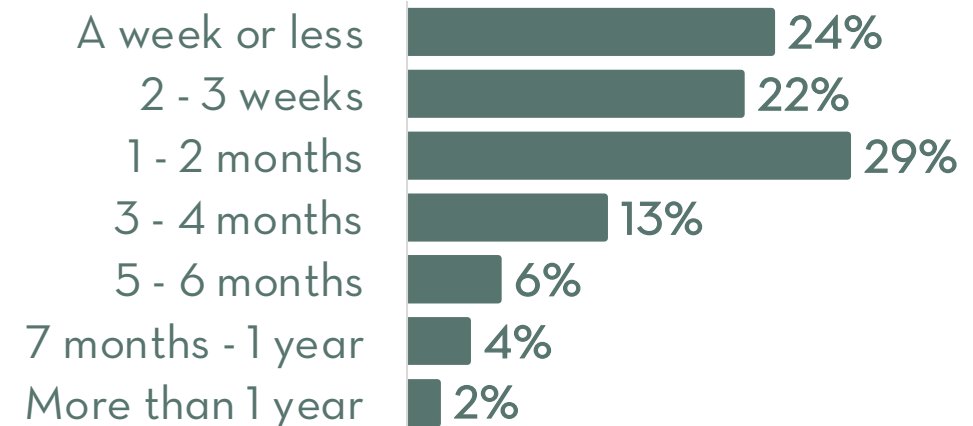
TRIP PLANNING CYCLE

- » **38%** of visitors to the Maine Highlands started planning their trip within a month of their trip
- » Very few visitors (**17%**) have planning windows longer than 4 months
- » **46%** of visitors have a booking window of less than 1 month
- » Very few visitors (**12%**) booked accommodations 5+ months in advance

Beginning of Trip Planning Cycle

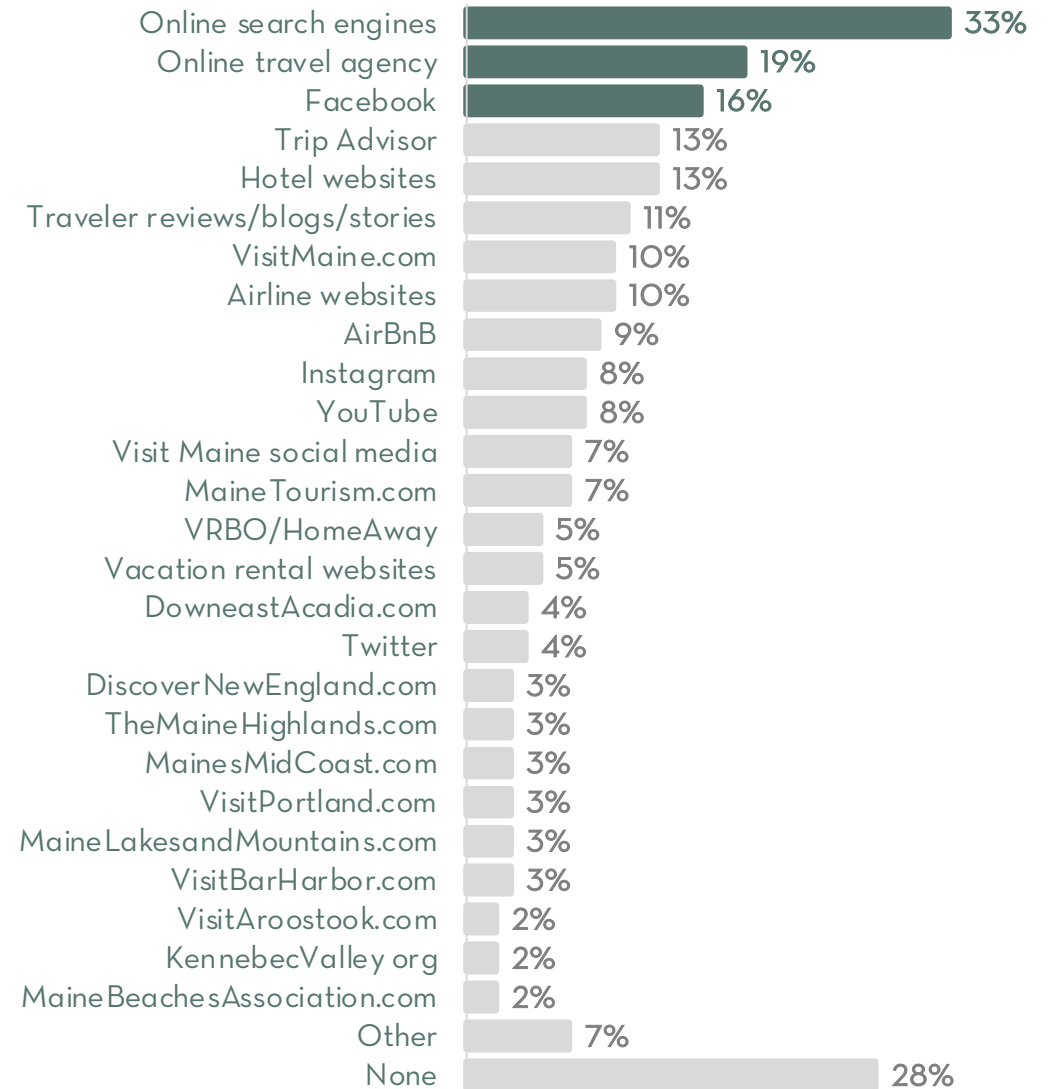


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

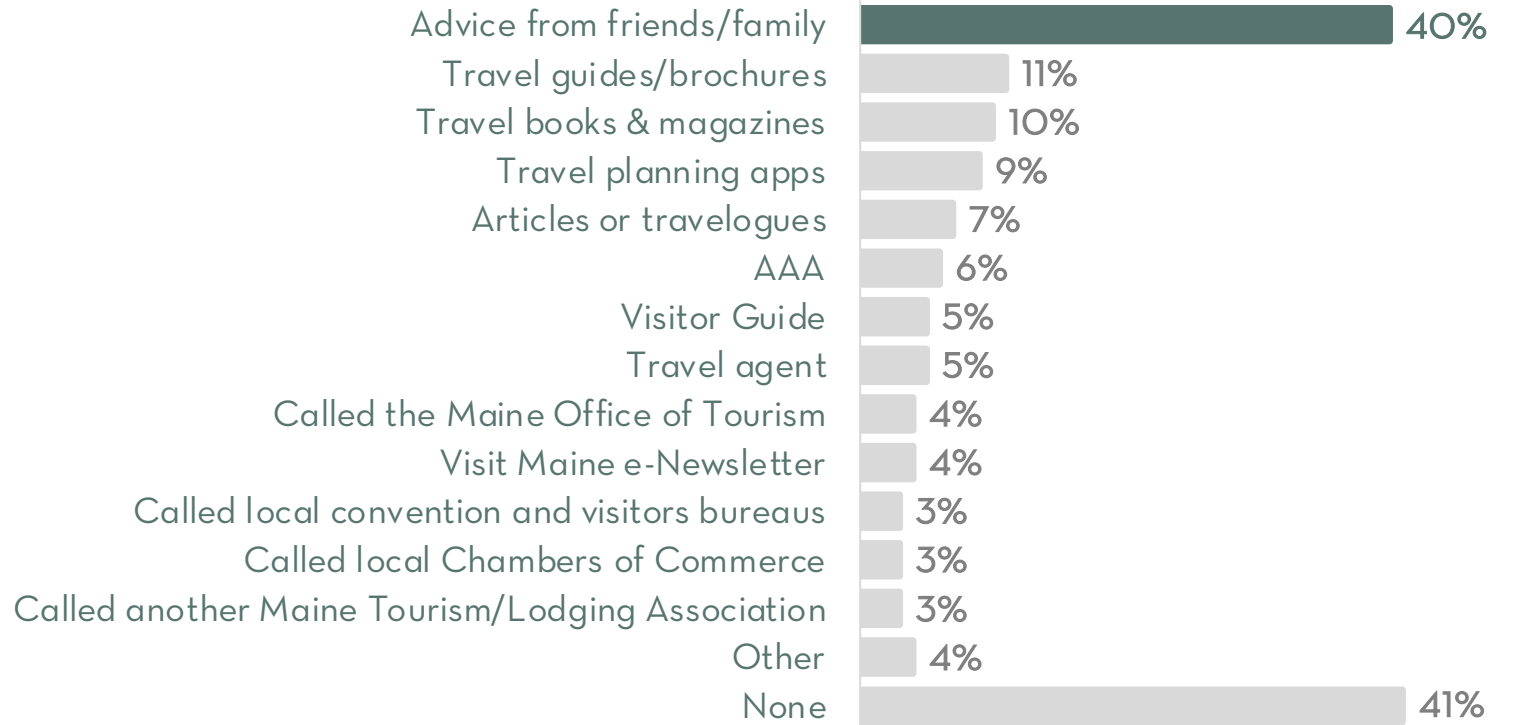
- » Over **7 in 10** visitors used one or more online resources to help them plan their trip to the Maine Highlands
- » **1 in 3** visitors to the Maine Highlands used an online search engine, such as Google, to help them plan their trip in Maine
- » **1 in 10** visitors used VisitMaine.com, and **7%**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



*Multiple responses permitted.

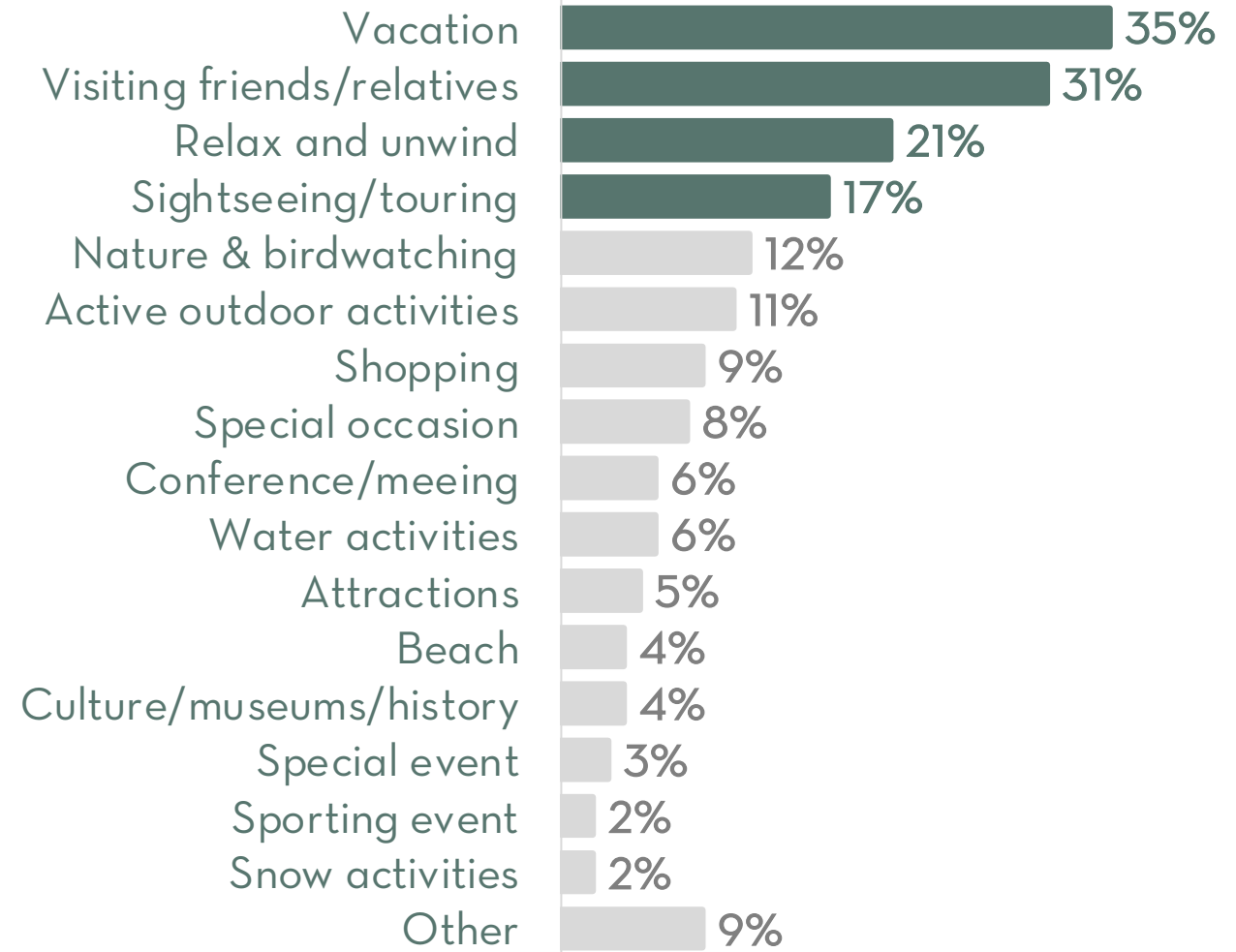
OTHER TRIP PLANNING SOURCES*

- » 2 in 5 visitors relied on advice from their friends and family to help them plan their trip to the Maine Highlands
- » 41% of visitors did not use any other resources to help them plan their trip to the Maine Highlands



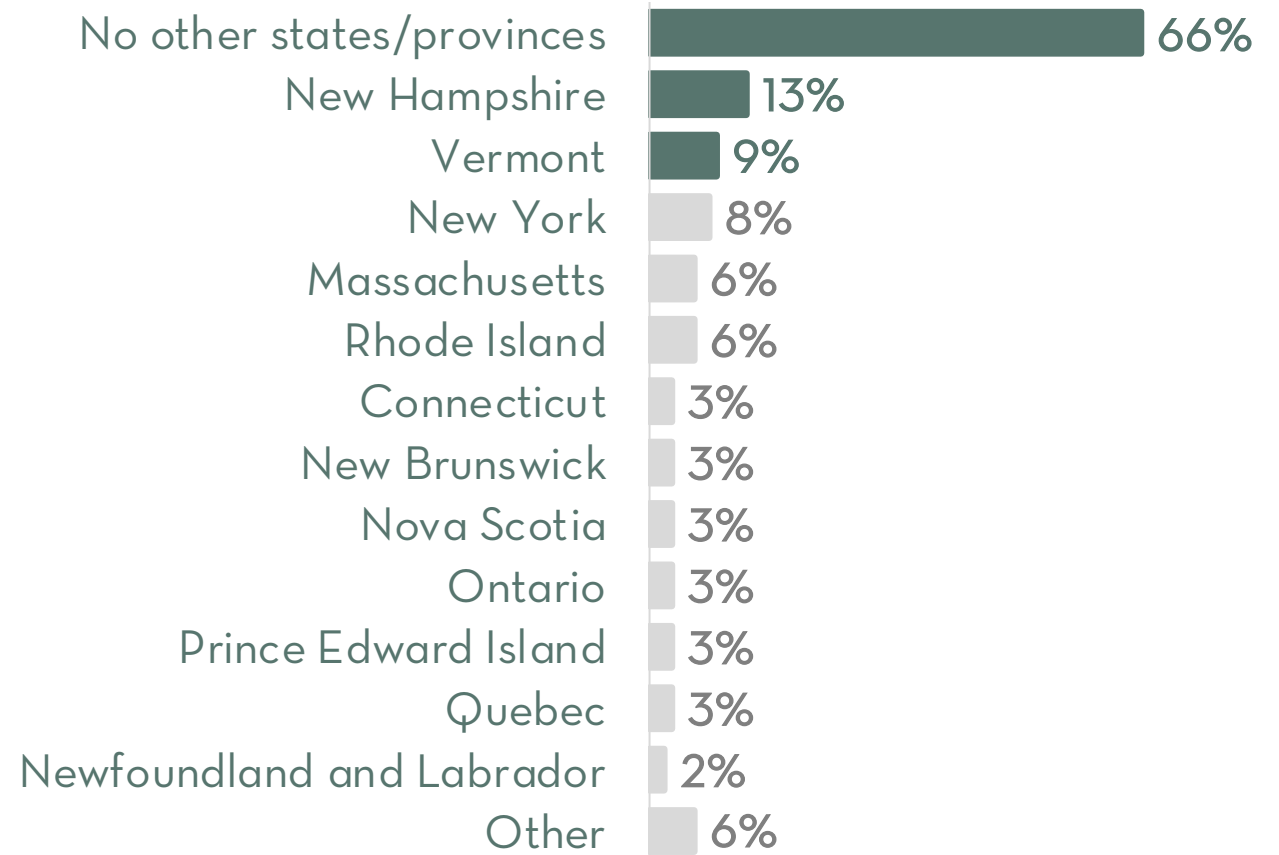
REASONS FOR VISITING*

- » **35%** of visitors traveled to the Maine Highlands for a vacation
- » **3 in 10** visitors came to the Maine Highlands to visit their friends and relatives, and **1 in 5** visitors came to relax/unwind



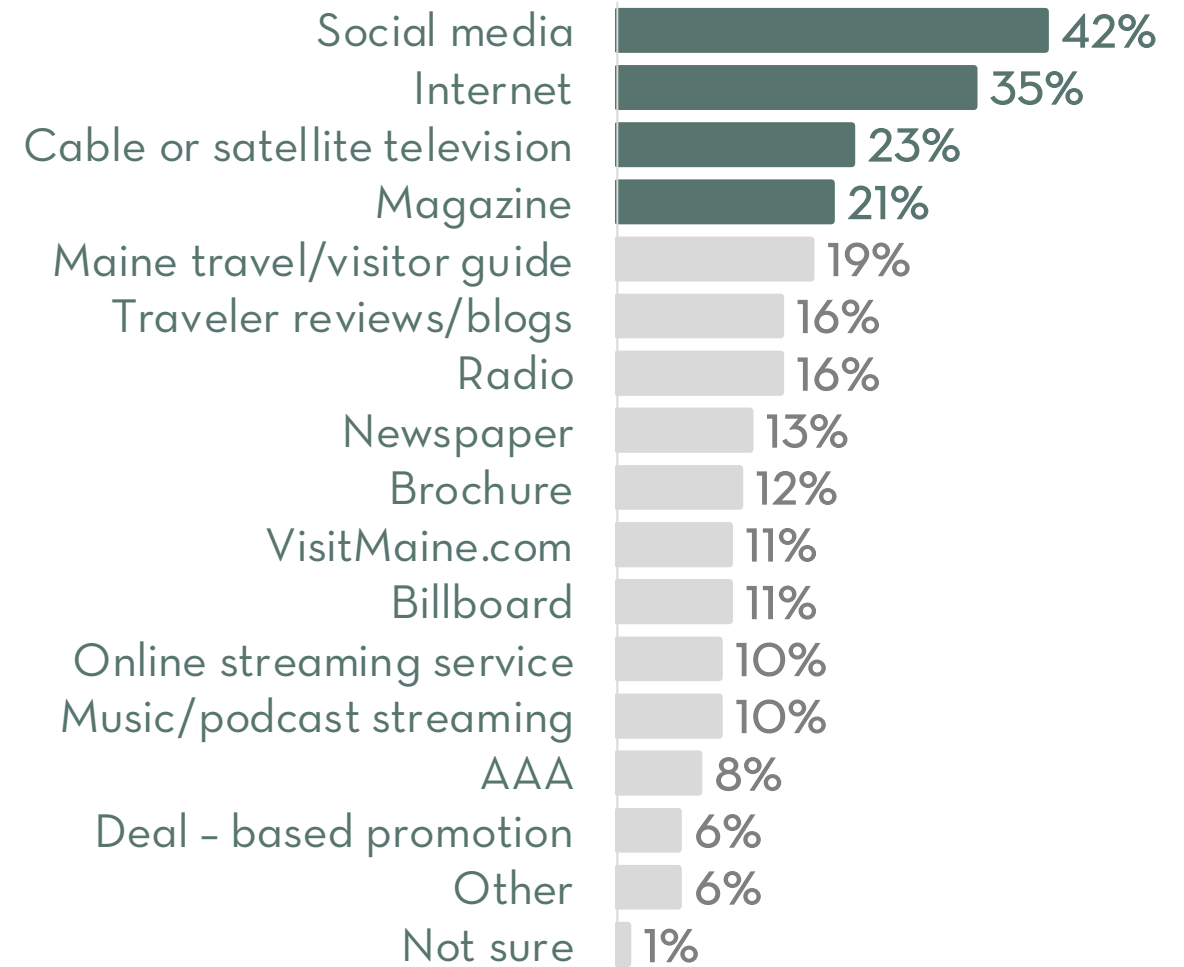
OTHER STATES & PROVINCES CONSIDERED*

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



PRE-TRIP EXPOSURE TO ADVERTISING*

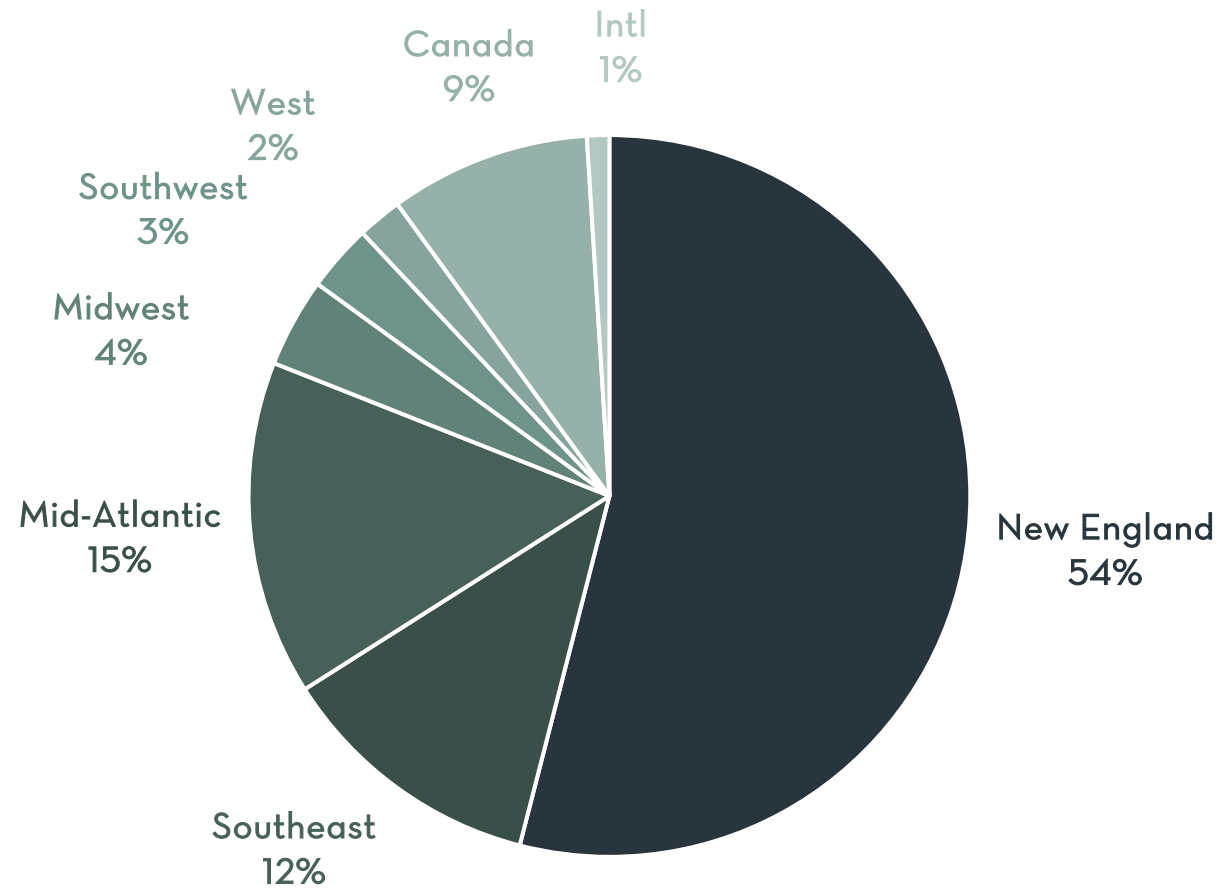
- » 42% of visitors noticed advertising or promotions for Maine prior to their trip to the Maine Highlands
- » Visitors who were exposed to this advertising primarily saw it on **social media**, the **internet**, **television**, or in **magazines**
- » Visitors were more likely to notice Maine promotions on **digital** media rather than on **traditional** media



TRIP PLANNING CYCLE : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » Nearly 1 in 2 visitors to the Maine Highlands were from Maine, Massachusetts, or Florida
- » 77% of visitors to the Maine Highlands came from 10 U.S. states and Canadian provinces
- » Over 3 in 10 visitors to the Maine Highlands were traveling from another region of Maine

State/Country	Percent
Maine	31%
Massachusetts	9%
Florida	8%
New Hampshire	7%
New York	6%
New Brunswick	5%
Connecticut	4%
New Jersey	3%
Pennsylvania	2%
Ontario	2%

TOP ORIGIN MARKETS

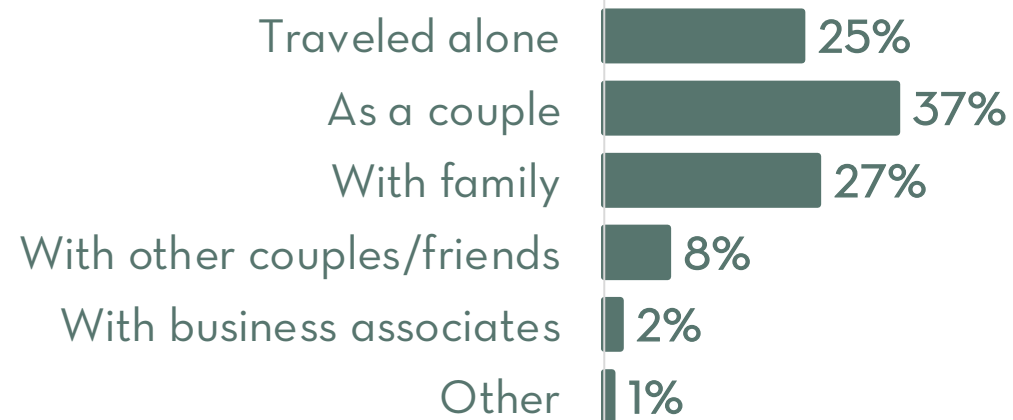
- » The New York City and Boston metro areas were the **top origin markets** for visitors to the Maine Highlands
- » **1 in 5** visitors traveled from **5** markets in Maine and other U.S. states

Market	Percent
New York City, NY	5%
Boston, MA	5%
Miami - Ft. Lauderdale, FL	3%
Washington D.C. - Baltimore, MD	2%
Orlando, FL	2%

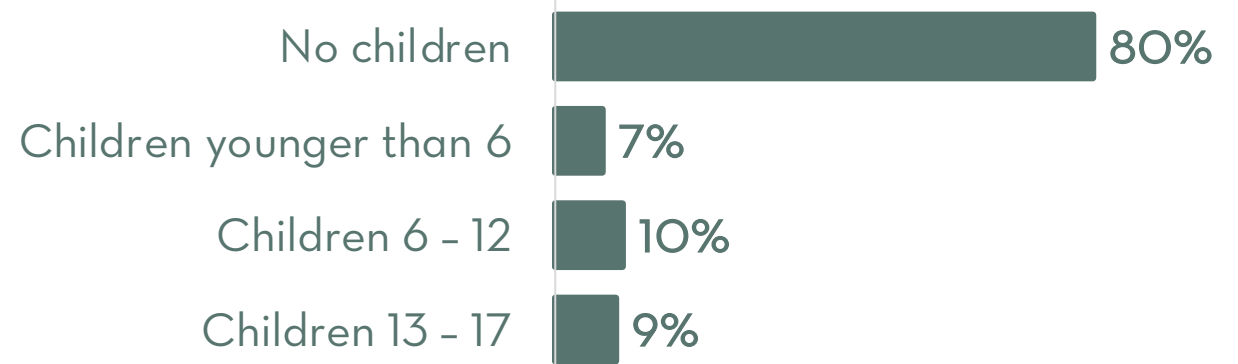
TRAVEL PARTIES

- » Typical visitors traveled in the Maine Highlands with a party of **2.4** people
- » Nearly **2 in 5** visitors as a couple
- » Only **1 in 5** visitors traveled in the Maine Highlands with one or more children in their travel party

Travel Party Composition



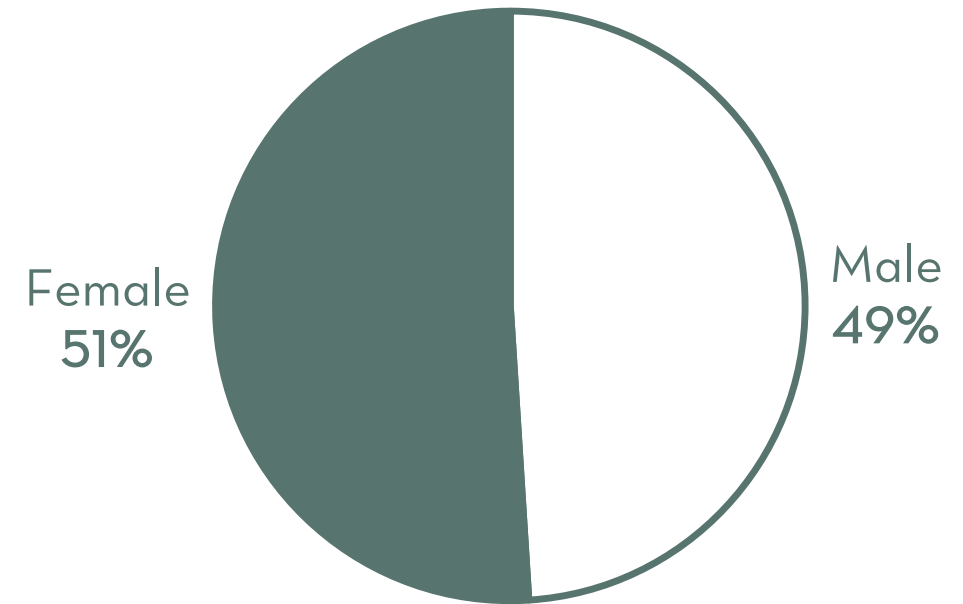
*Children in Travel Party**



*Multiple responses permitted.

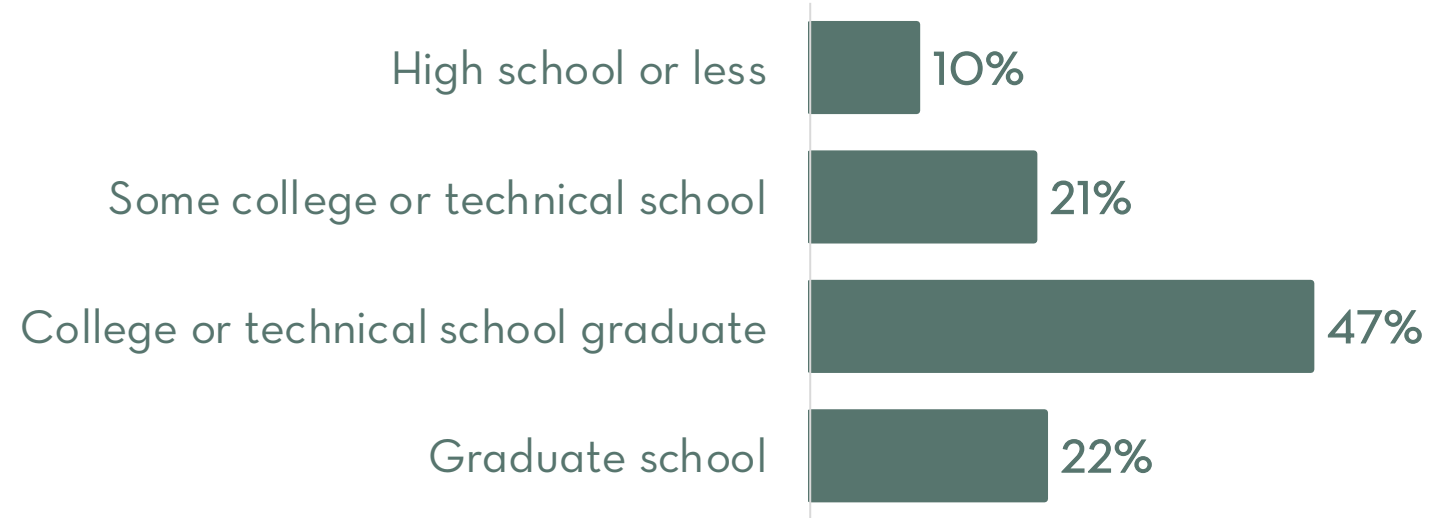
GENDER

- » 51% of visitors to the Maine Highlands who were interviewed were female



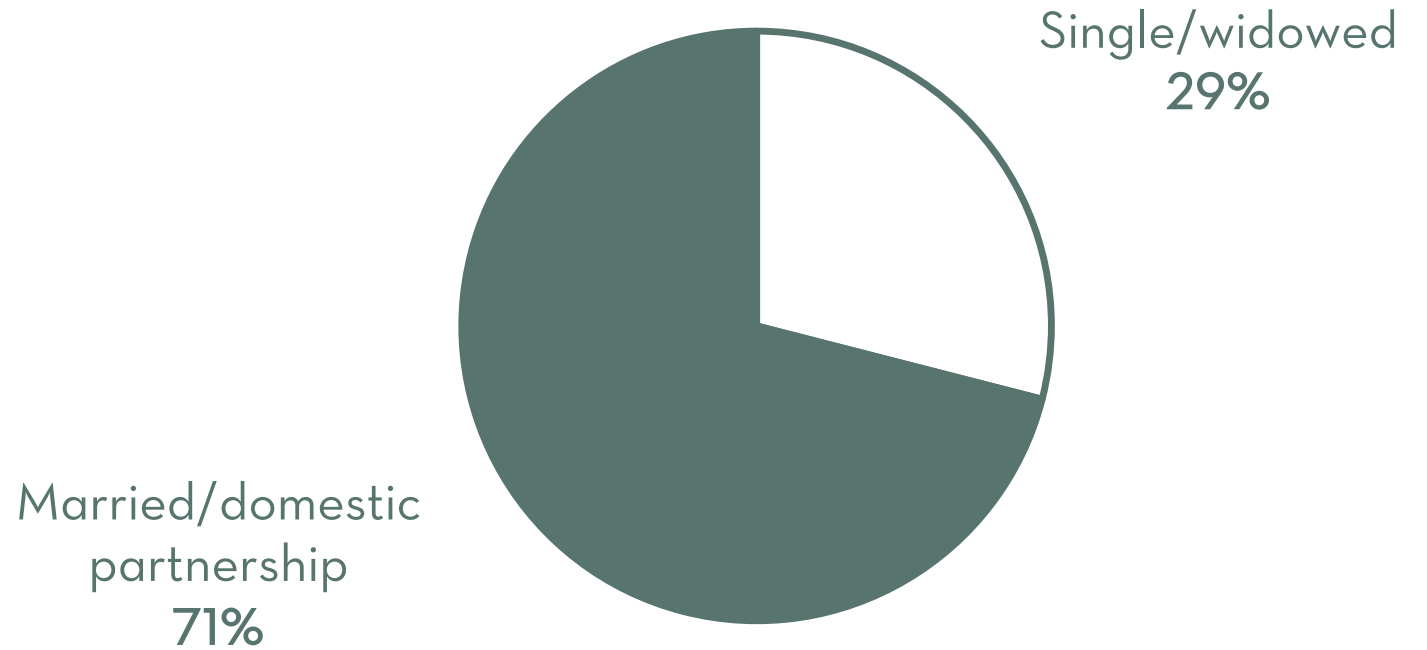
EDUCATIONAL ATTAINMENT

- » Visitors to the Maine Highlands have substantial formal educations, with nearly **7 out of 10** having at least a college or technical school degree, and over **1 in 5** possessing a graduate degree



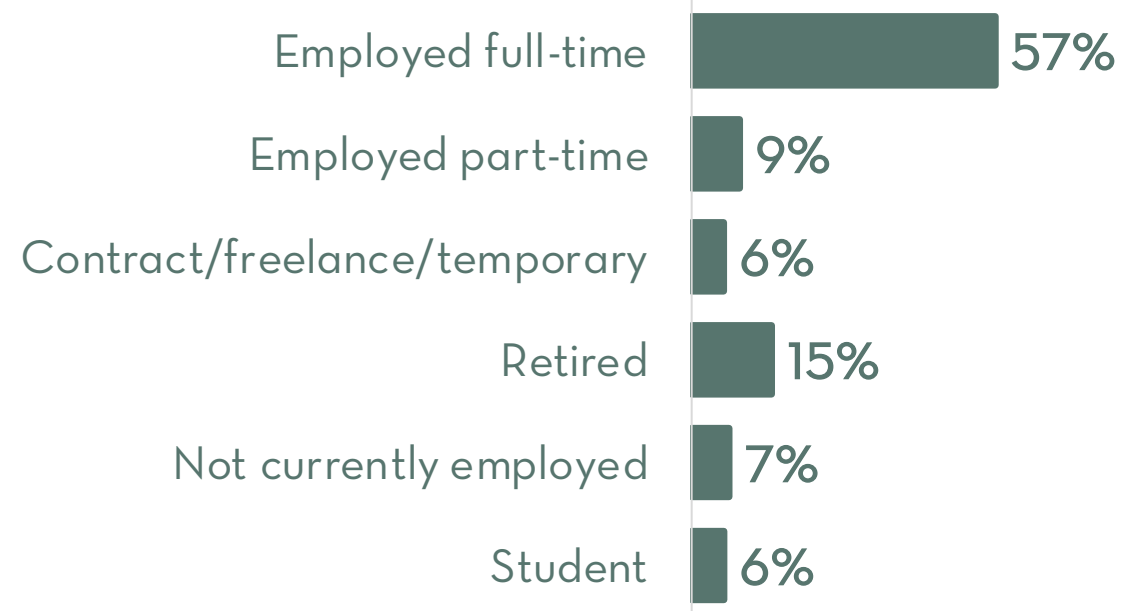
MARITAL STATUS

- » 7 in 10 visitors to the Maine Highlands were married or living with their partner



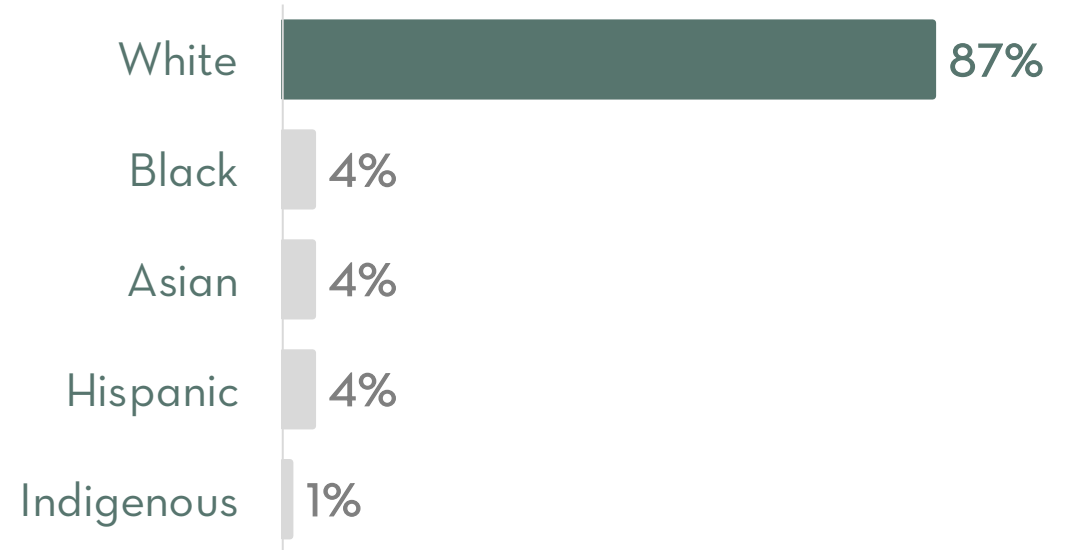
EMPLOYMENT STATUS

- » Over **7 in 10** visitors to the Maine Highlands were employed, most full-time



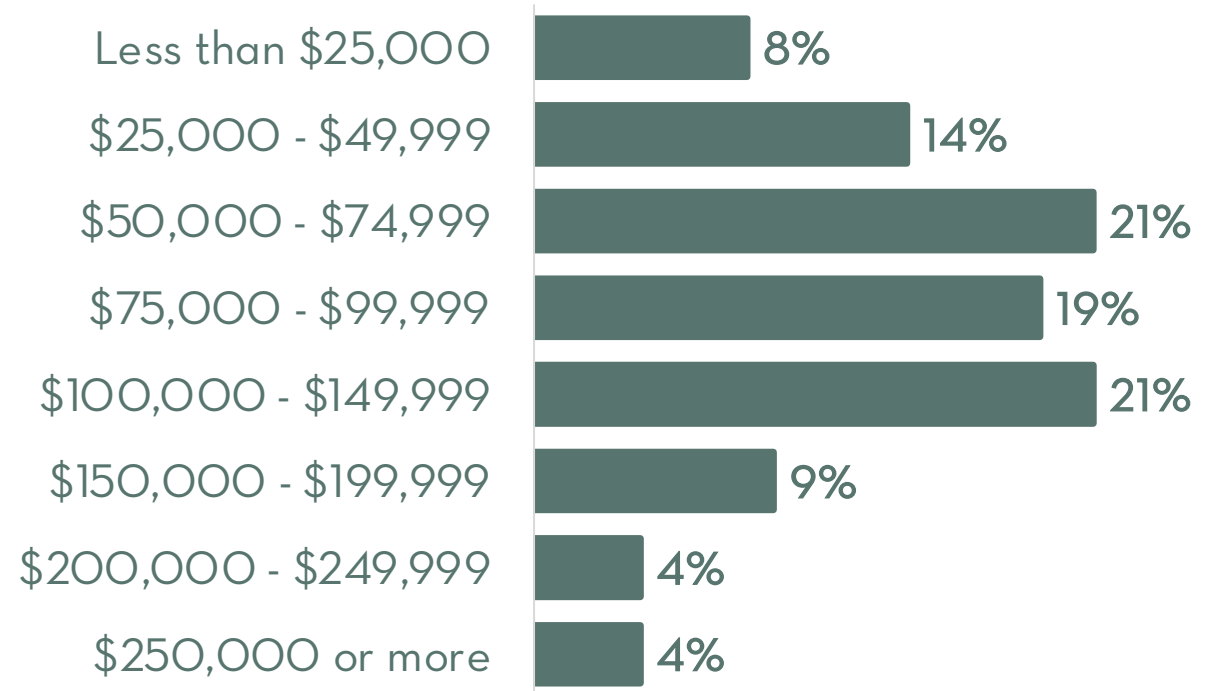
RACE & ETHNICITY

» 87% of visitors to the Maine Highlands were White/Caucasian



HOUSEHOLD INCOME

- » Typical visitors to the Maine Highlands earned **\$84,200** per year in household income
- » **17%** of visitors to the Maine Highlands have household incomes that exceed \$150,000



NEW & RETURNING VISITORS

» **23%** of visitors to the Maine Highlands were traveling in Maine for the first time

» **3 in 10** visitors to the Maine Highlands had previously traveled in Maine more than 10 times

This is my first time

23%

2 - 5 times

31%

6 - 10 times

16%

11+ times

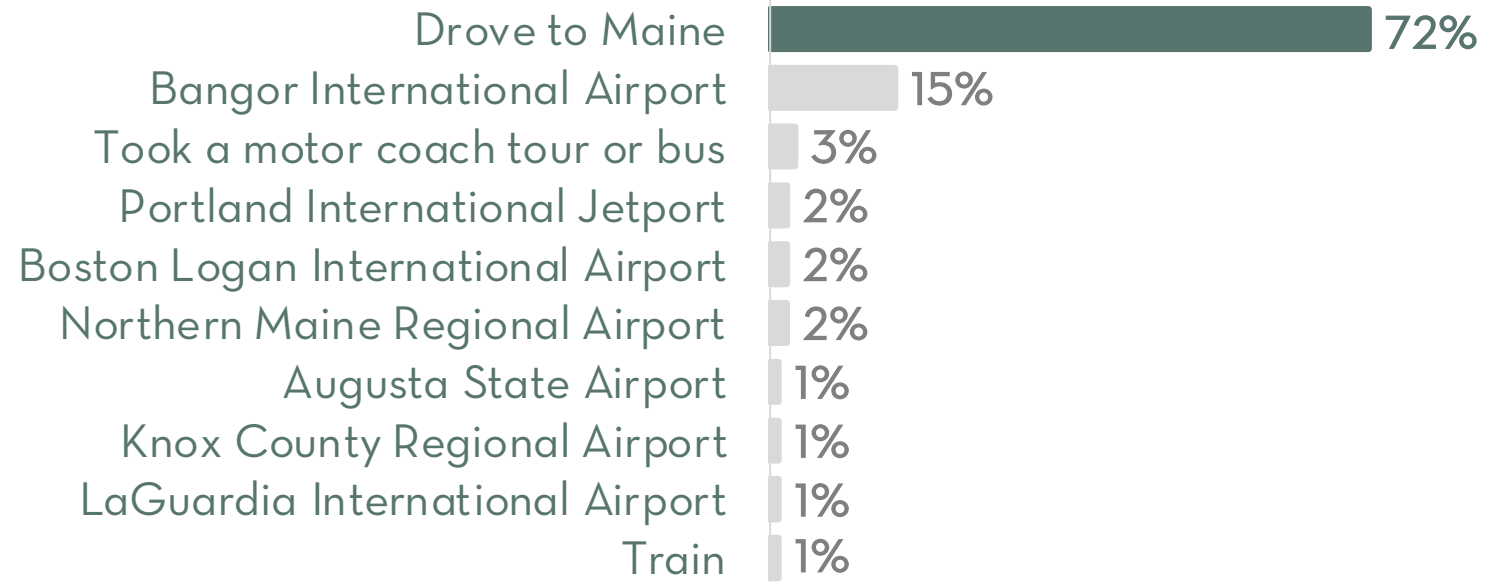
30%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



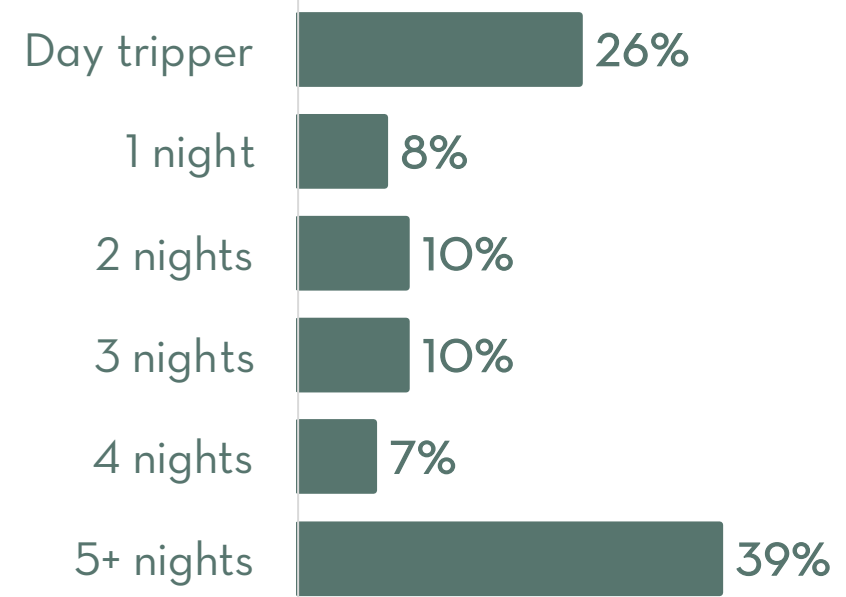
MODES OF TRANSPORTATION

- » Maine Highlands is a drive-market for most visitors as **72%** choose to travel by car rather than by plane, motor coach/bus, or train
- » **Most** visitors to the Maine Highlands who flew to Maine arrived at Bangor International Airport



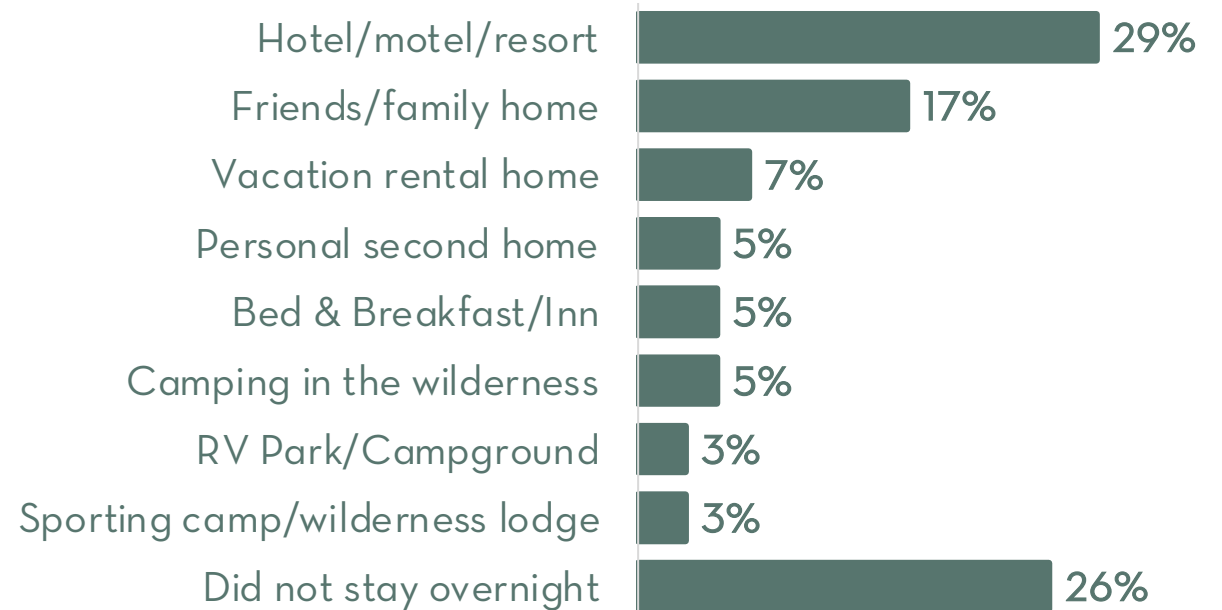
NIGHTS STAYED

- » **3 in 4** visitors to the Maine Highlands stayed one night or more in Maine during their trip
- » Typical visitors to the Maine Highlands stayed **5.8** nights Maine
- » **2 in 5** visitors to the Maine Highlands stayed 5 or more nights in Maine



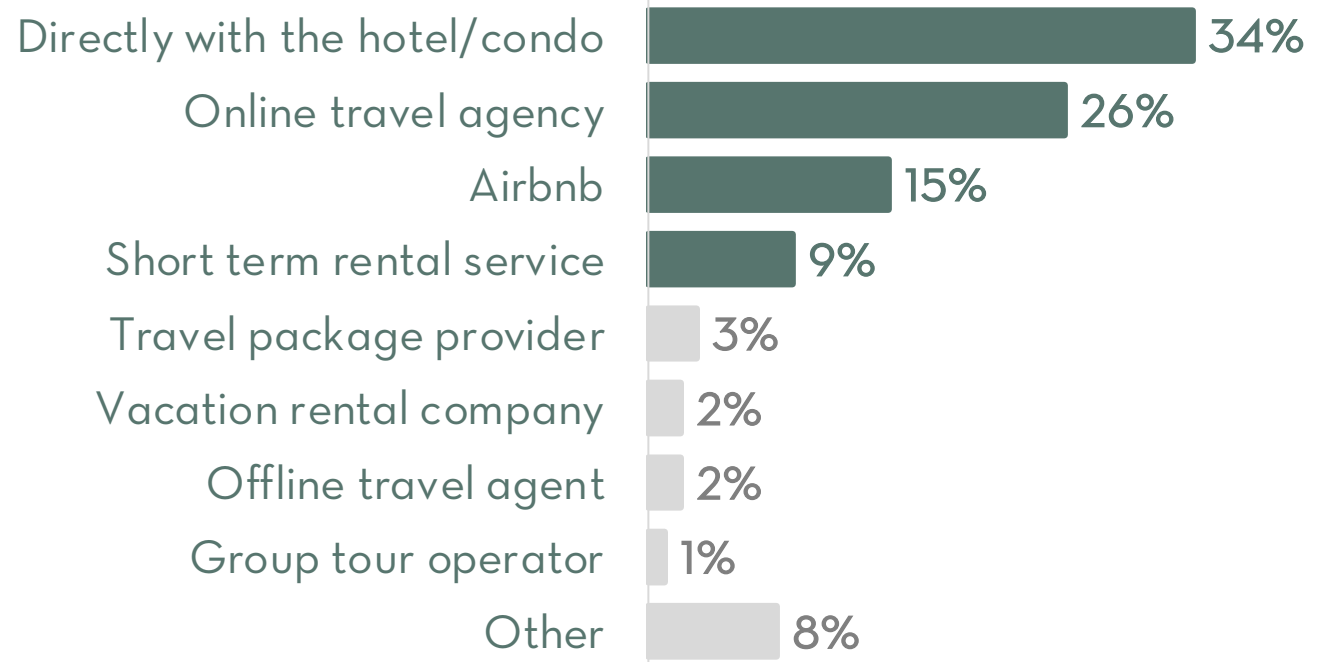
ACCOMMODATIONS

- » **3 in 10** visitors to the Maine Highlands stayed overnight in a hotel, motel, or resort
- » **17%** of visitors to the Maine Highlands stayed overnight with friends or relatives



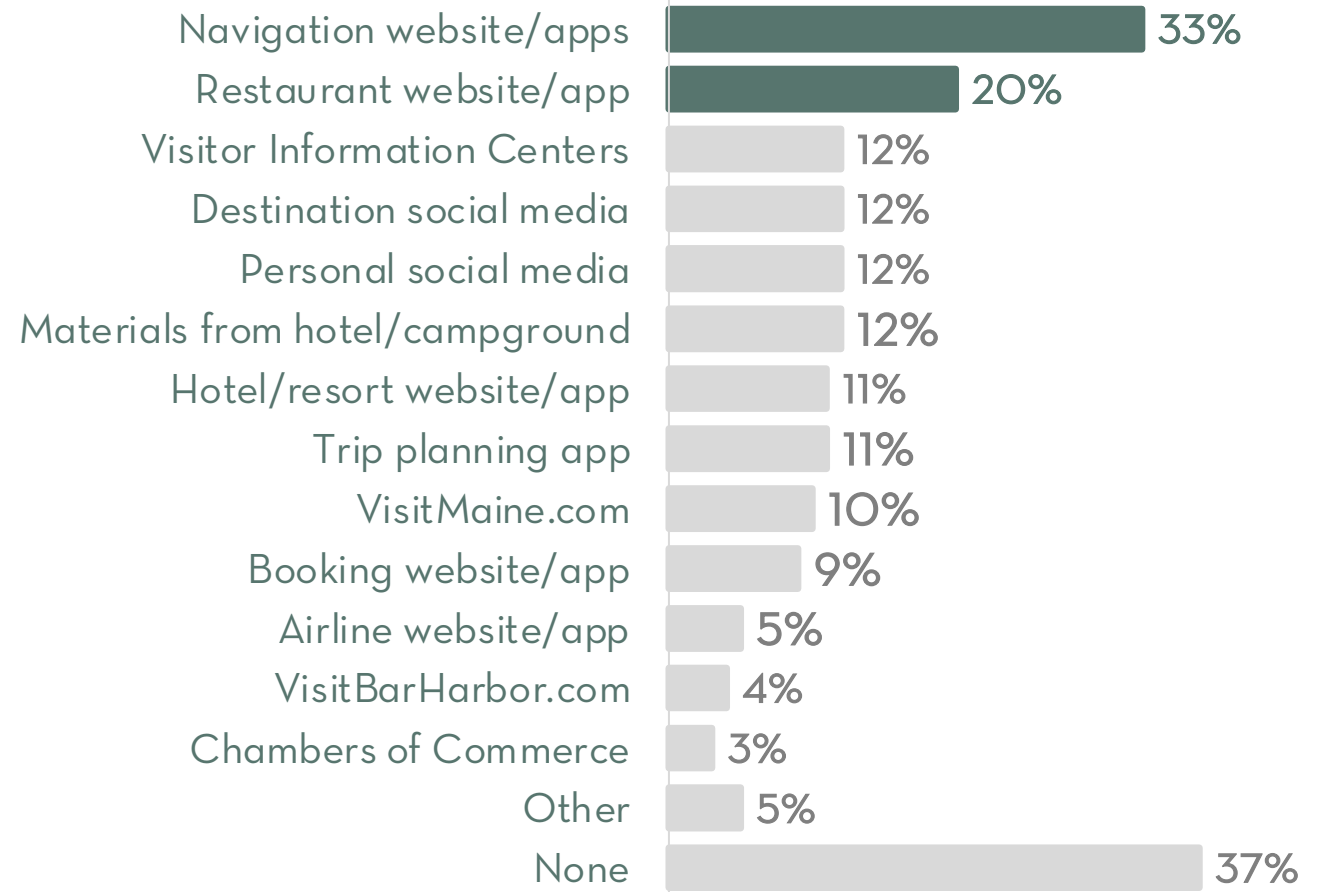
BOOKING METHODS

- » 52% of visitors to the Maine Highlands stayed overnight in paid accommodations during their trip in Maine
- » 1 in 3 visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



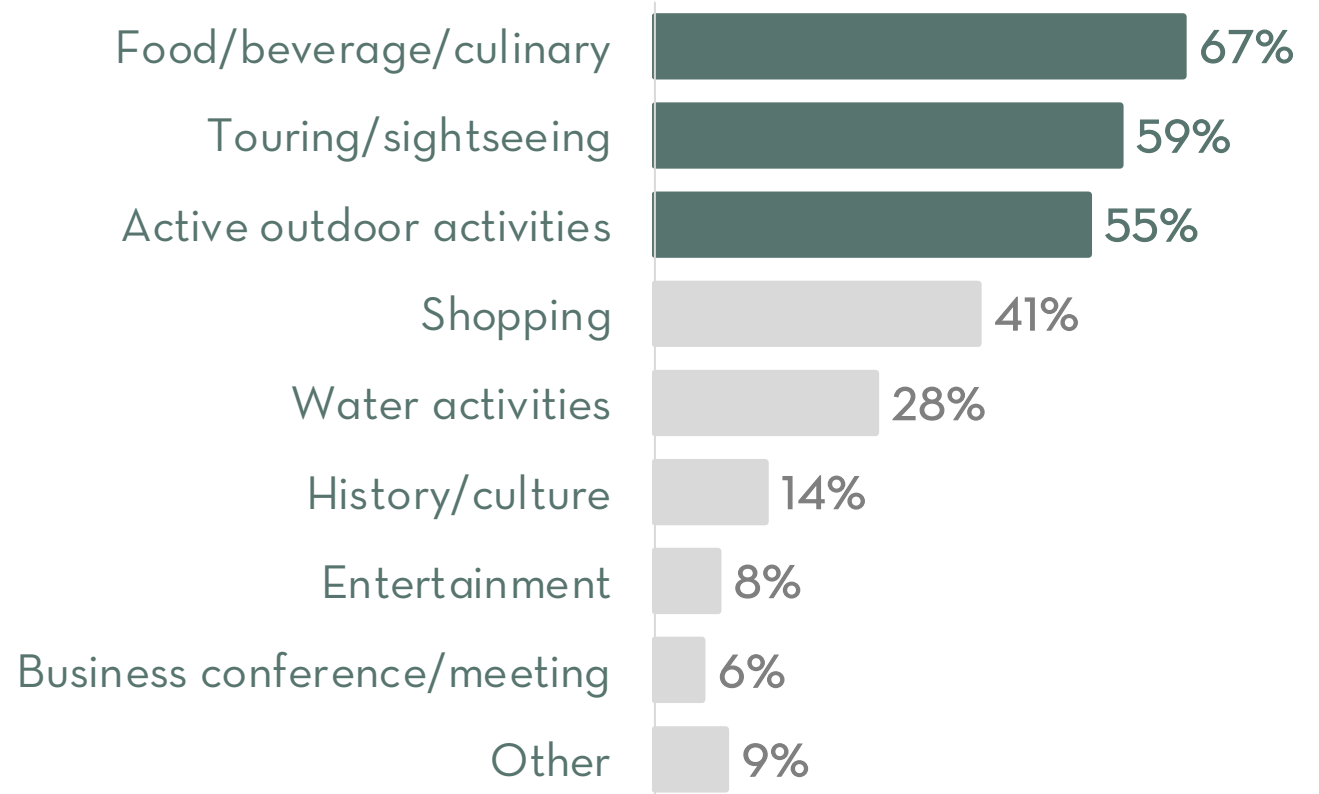
IN-MARKET VISITOR RESOURCES*

- » **1 in 3** visitors used navigation websites and apps to plan activities during their trip to the Maine Highlands
- » **37%** of visitors did not use any resources to plan activities while they were in the Maine Highlands

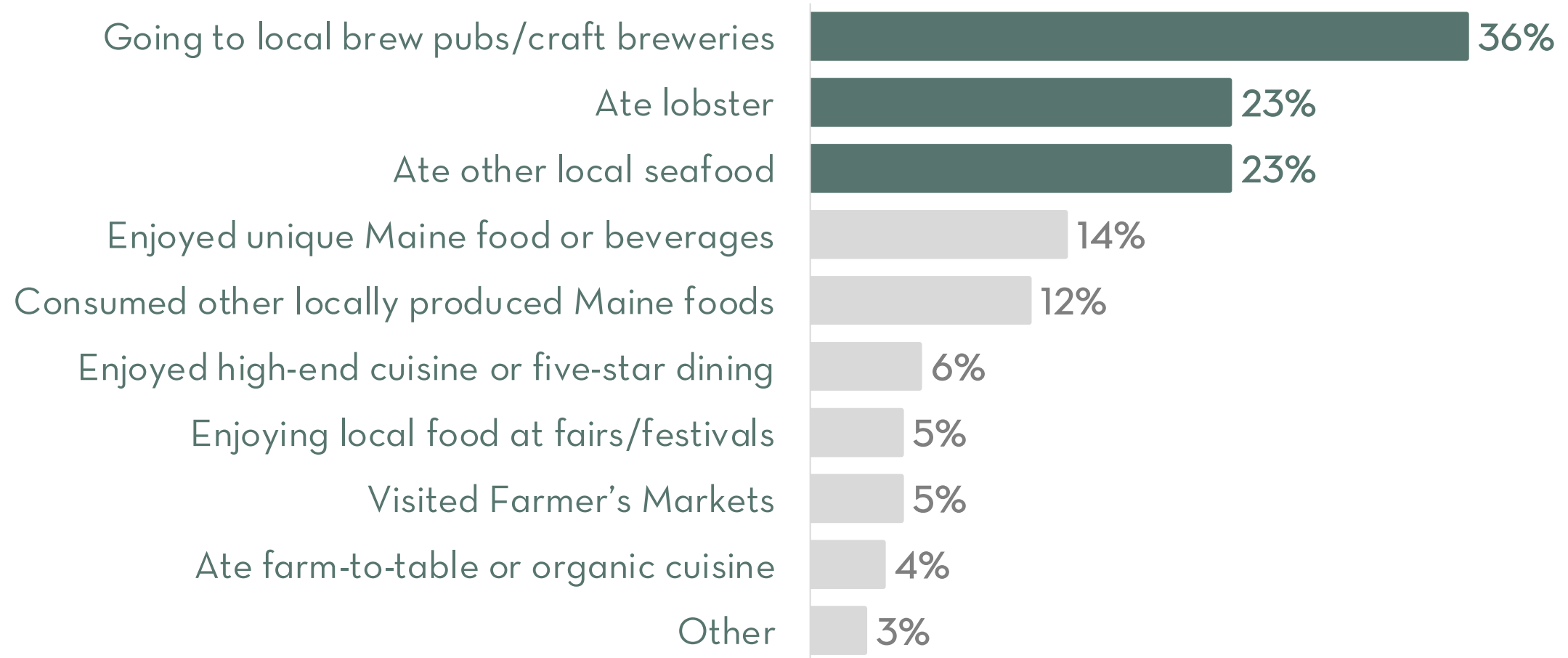


VISITOR ACTIVITIES*

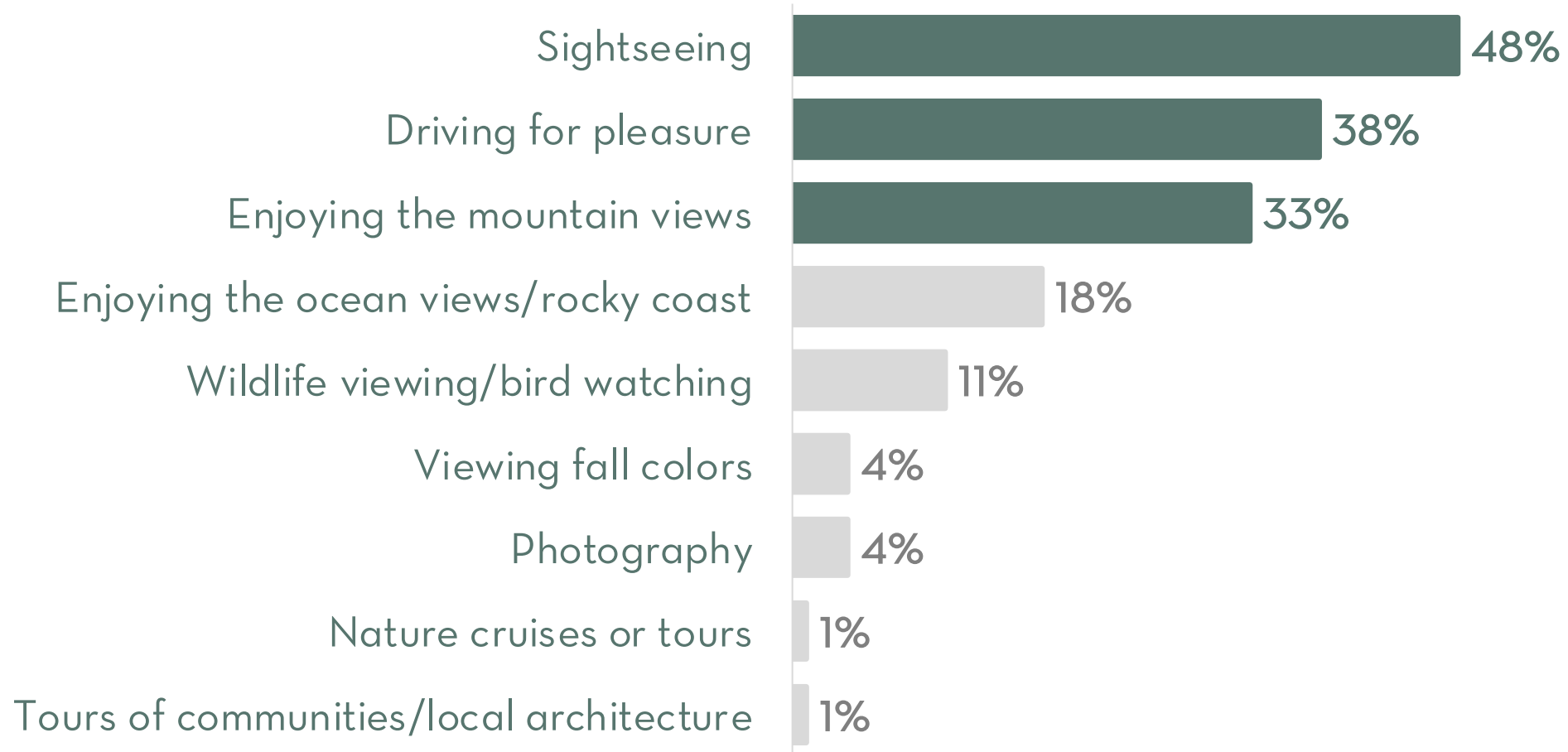
- » 2 in 3 of visitors participated in food, beverage, and culinary activities during their trip in the Maine Highlands
- » 3 in 5 visitors to the Maine Highlands engaged in sightseeing/touring activities during their trip



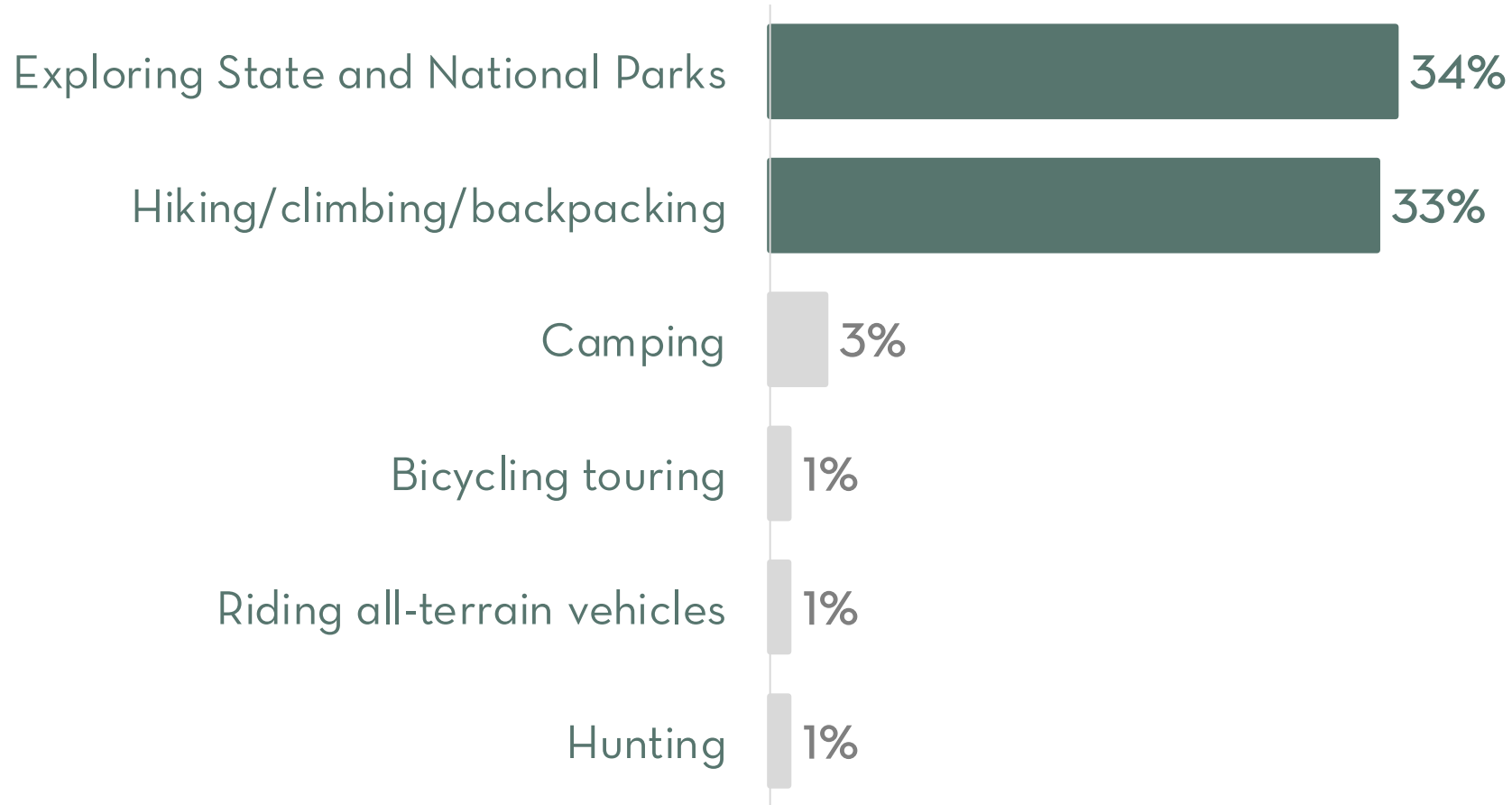
FOOD & BEVERAGE ACTIVITIES*



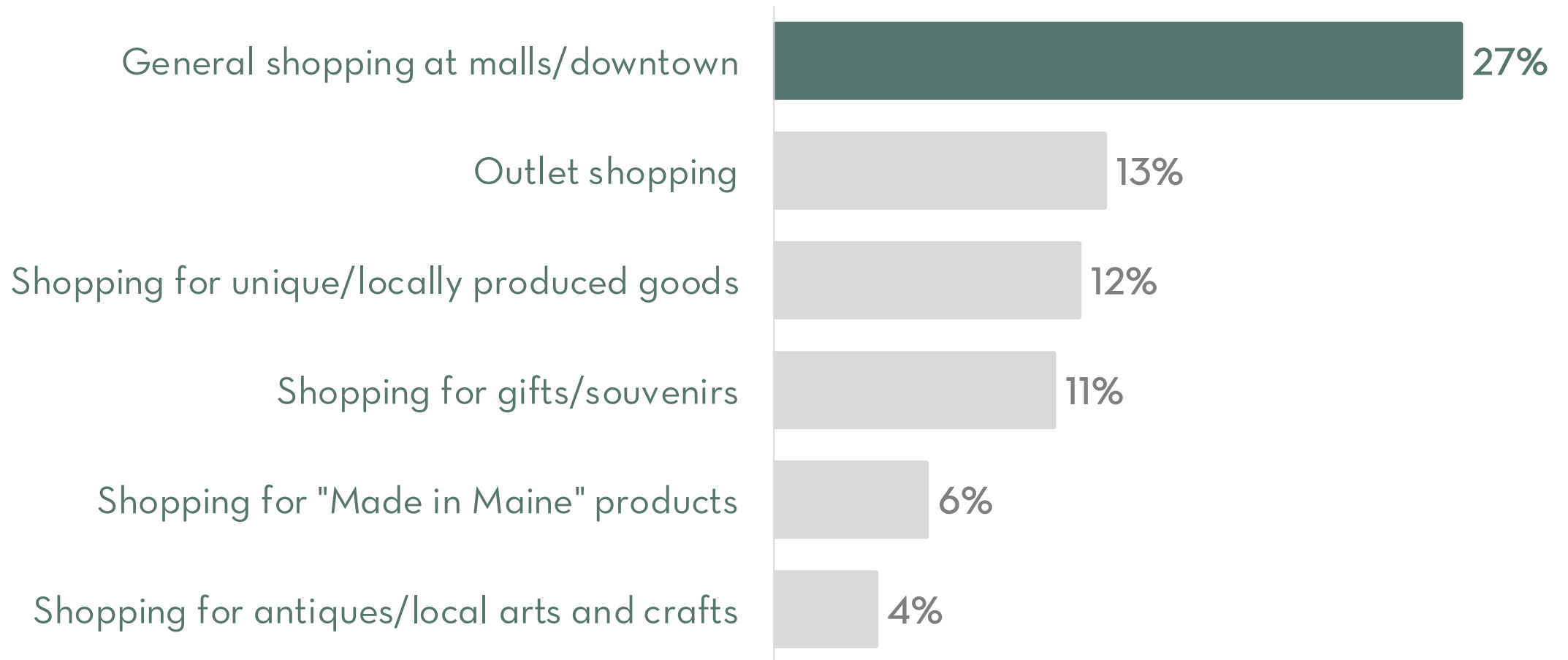
TOURING & SIGHTSEEING ACTIVITIES*



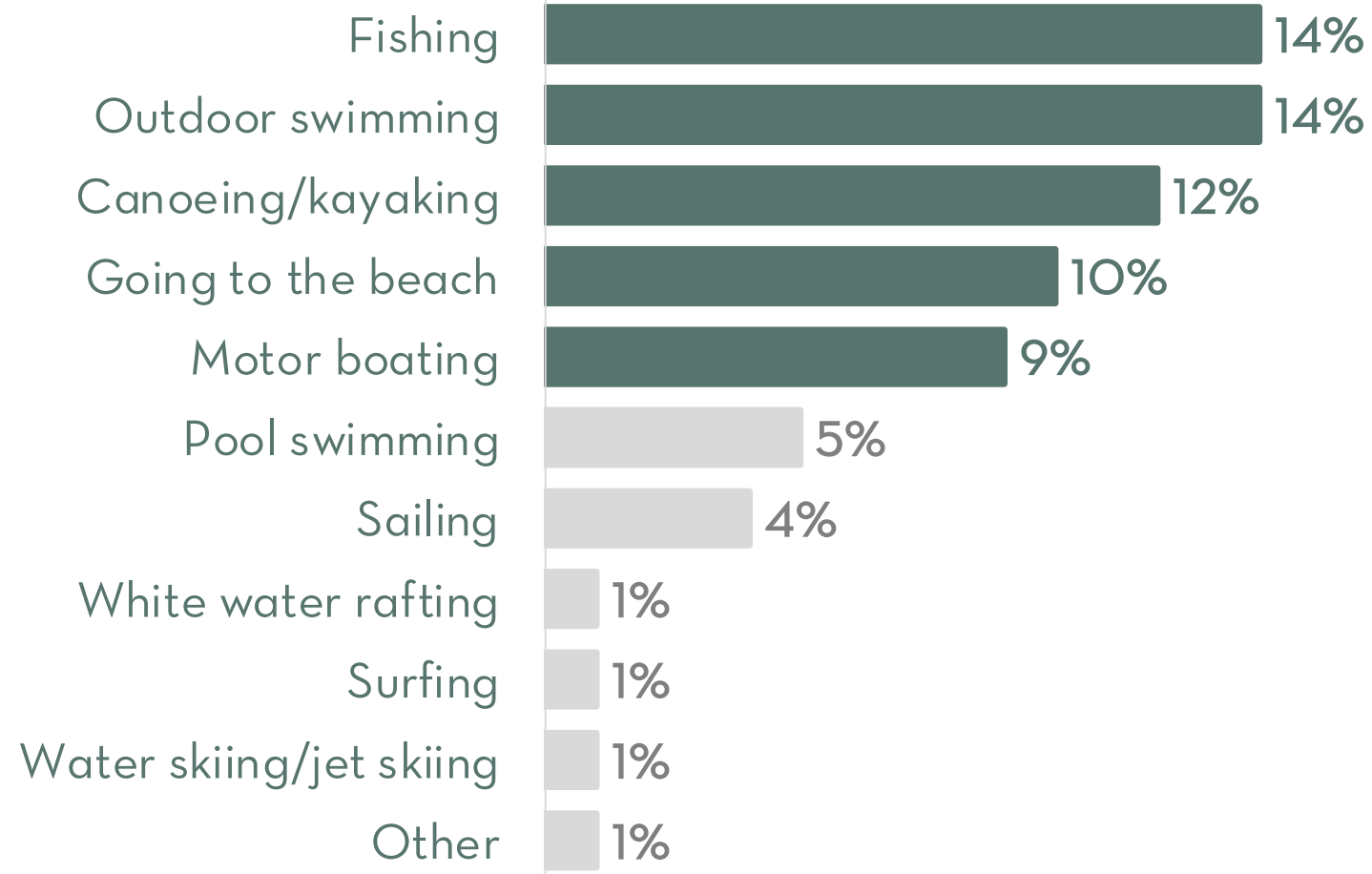
ACTIVE OUTDOOR ACTIVITIES*



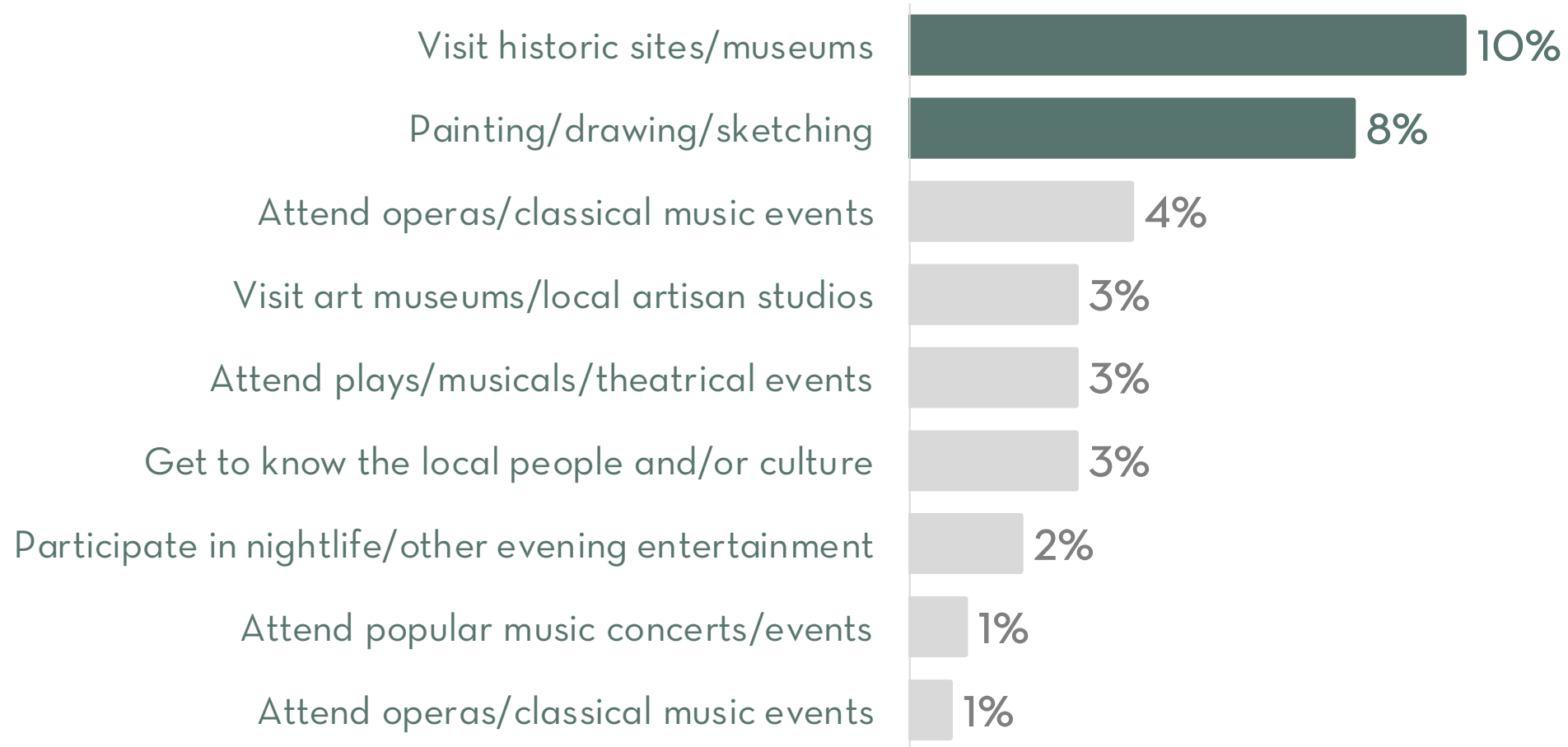
SHOPPING ACTIVITIES*



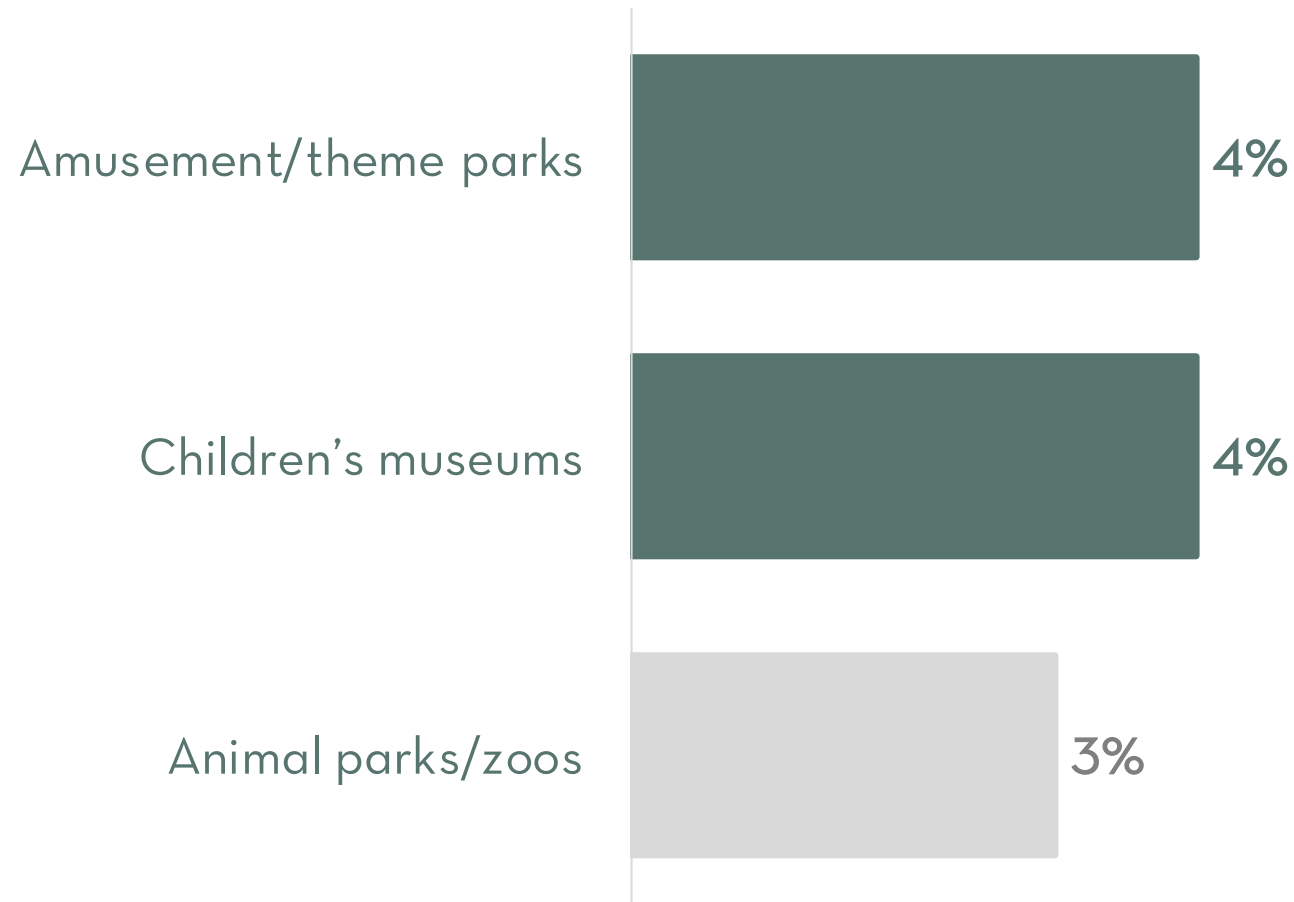
WATER ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*

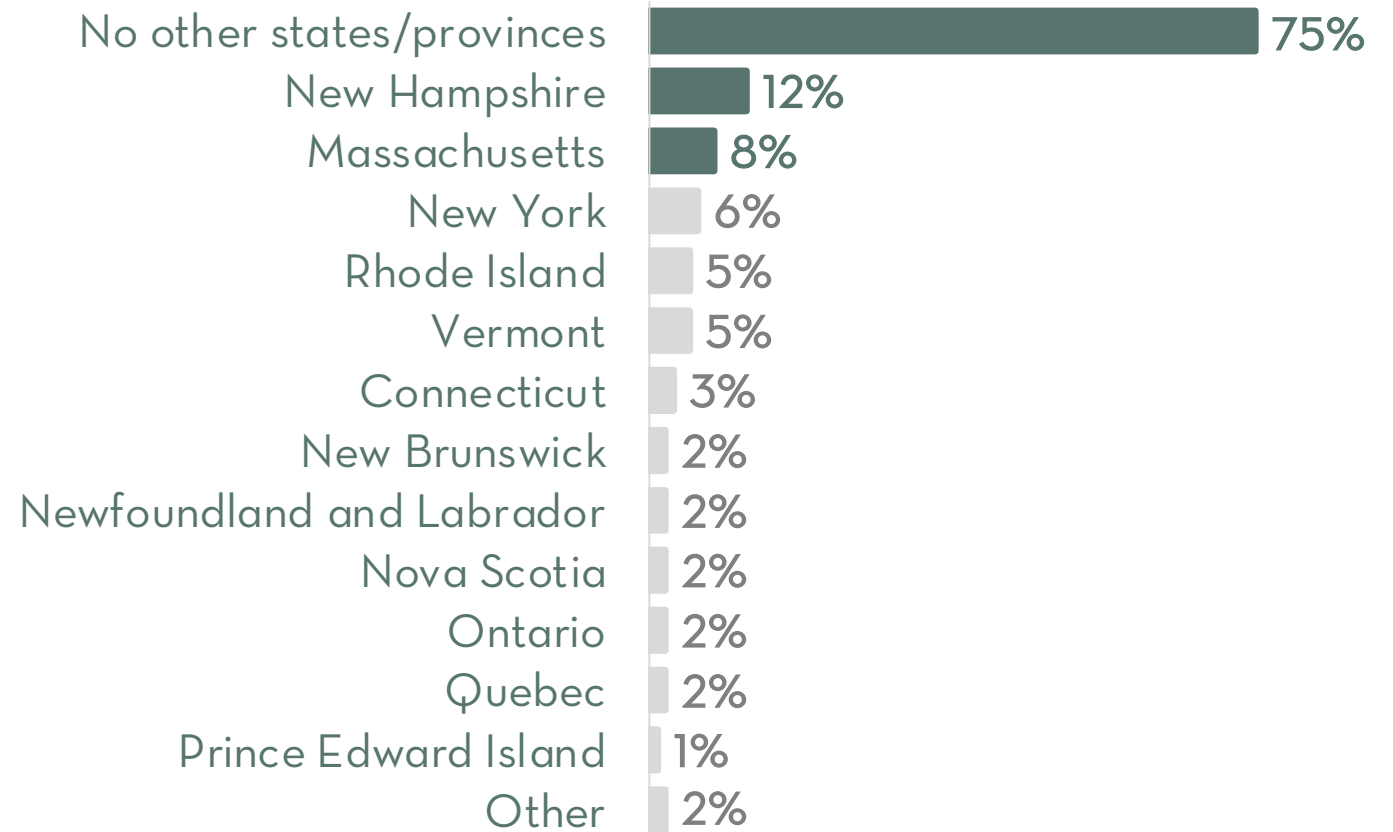


ENTERTAINMENT ACTIVITIES*



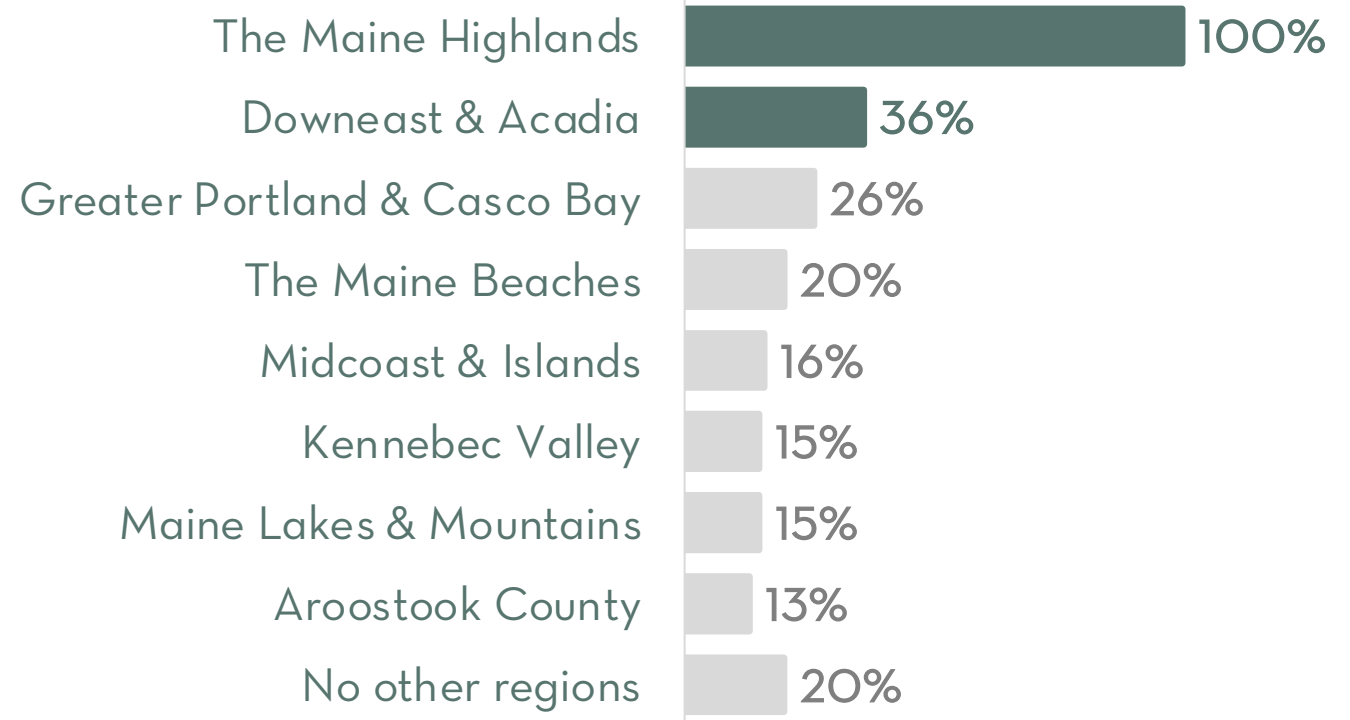
OTHER STATES & PROVINCES VISITED*

- » 3 in 4 visitors did not visit any other U.S. state or Canadian province on their trip to the Maine Highlands
- » 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 Maine Highlands during their trip in Maine, rather than traveling throughout the state
- » **36%** of visitors to the Maine Highlands also visited Downeast & Acadia during their trip in Maine



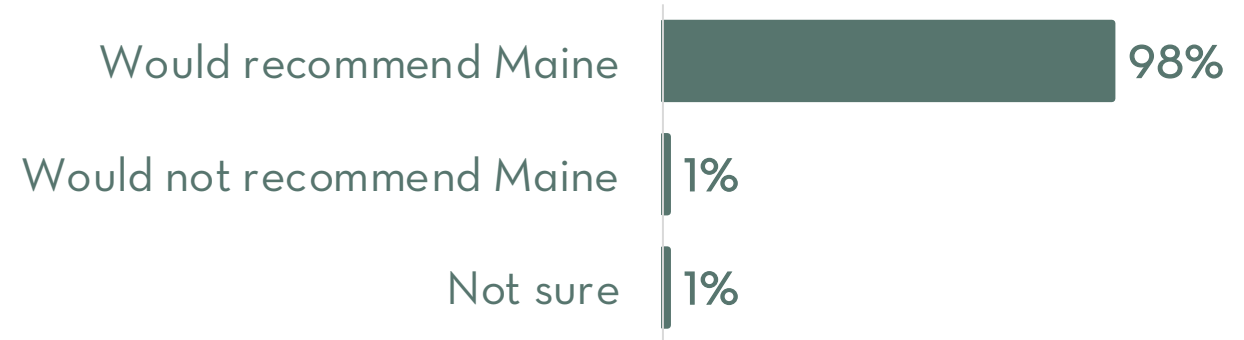
TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

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

Likelihood of Recommending Maine

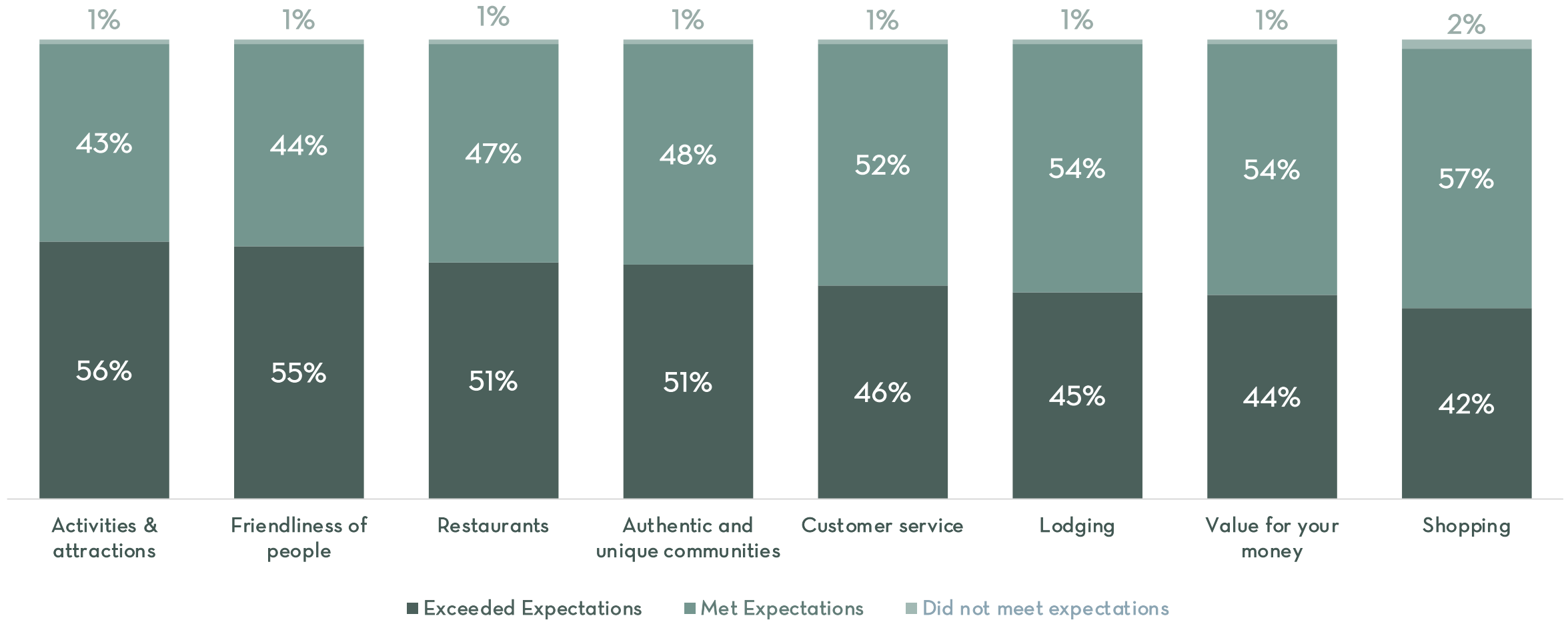


- » **97%** of visitors would recommend that their friends and family visit the Maine Highlands

Likelihood of Recommending the Maine Highlands



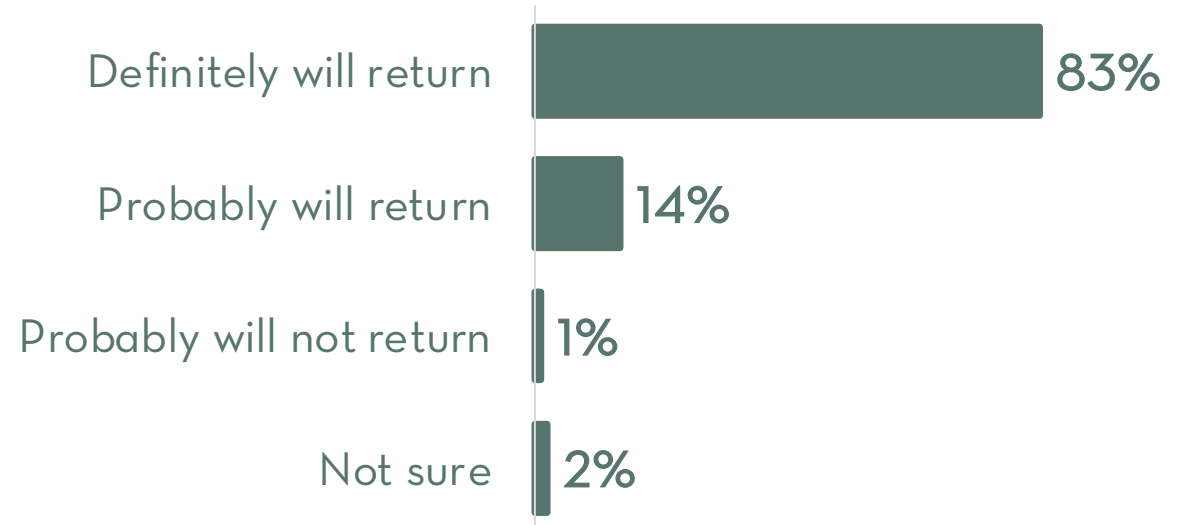
TRIP EXPECTATIONS



"Don't know" responses omitted.

LIKELIHOOD OF RETURNING TO MAINE

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



THE MAINE HIGHLANDS

2020 Visitor Tracking & Economic Impact Report January – December 2020

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