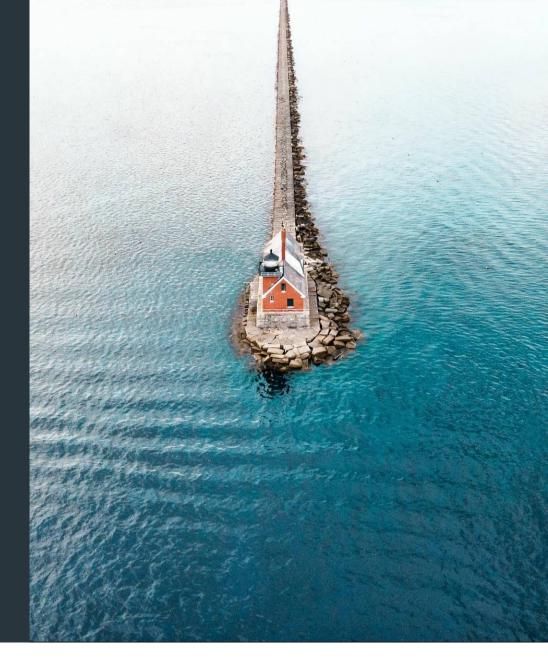
# MIDCOAST & ISLANDS

2020 Economic Impact & Visitor Tracking Report January – December 2020







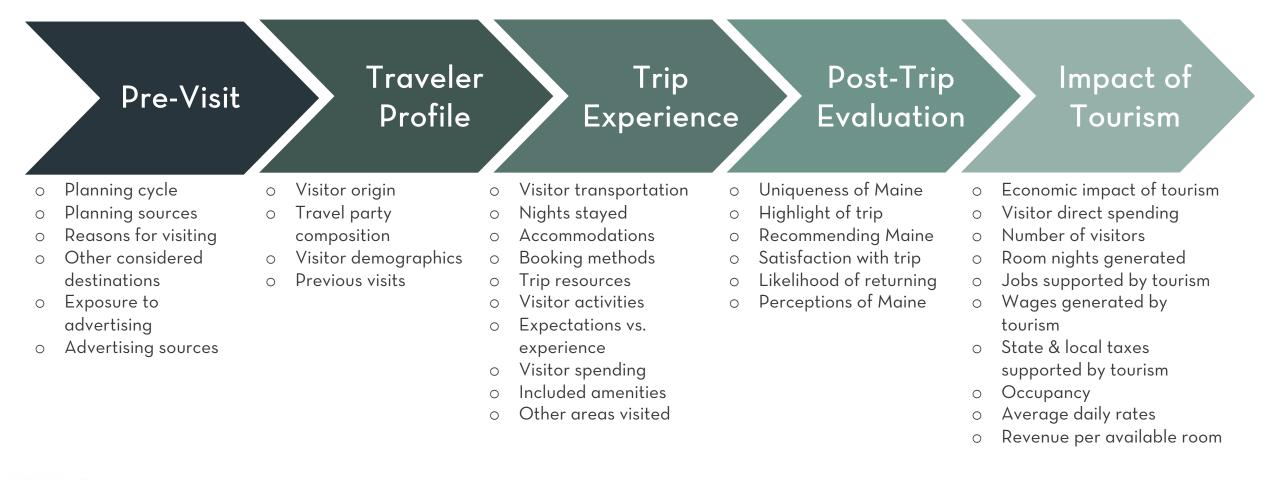
# INTRODUCTION





### 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 **Midcoast & Islands** region.





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## METHODOLOGY



#### Visitor Tracking

731 interviews were completed with visitors to the Midcoast & Islands 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 the Midcoast & Islands 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



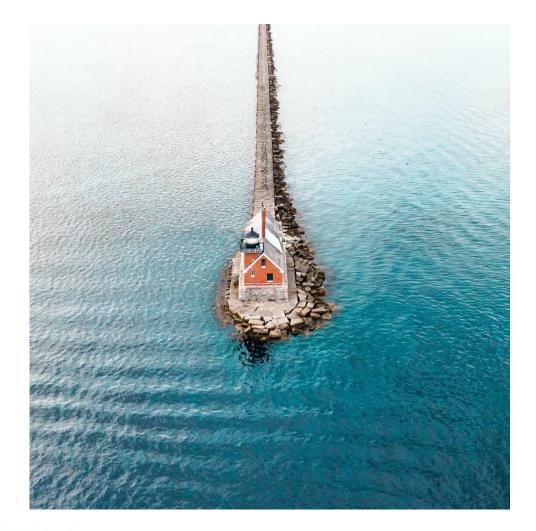


This section of the report includes **topline results** from the 2O2O Economic Impact and Visitor Tracking Study. It provides a visually pleasing, easy-to-read overview of key findings, and is typically used to present the data to government officials, media, etc.





### MIDCOAST & ISLANDS



Compared to visitors to other regions, visitors to Midcoast & Islands region are more likely to:

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- » Be visiting from the Mid-Atlantic
- » Participate in water activities
- » Use online planning sources

7

- » Use online travel agencies to plan their trip
- » Use advice from friends and family to plan their trip
- » Visit Maine to go sightseeing/touring
- » Stay in the Midcoast & Islands region for their entire trip



### TRIP PLANNING CYCLE : IMPACT OF TOURISM







### ECONOMIC IMPACT



## \$780,555,700

in economic impact to the Midcoast & Islands region







### **DIRECT SPENDING**

Visitors who took a trip to the Midcoast & Islands region in 2020 spent

## \$503,584,300

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





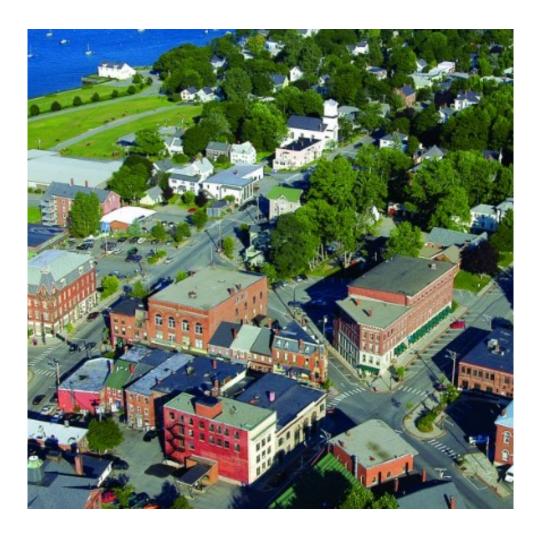


### VISITORS

### The Midcoast & Islands region attracted

# 1,621,800

visitors in 2020







### **ROOM NIGHTS**

Visitors to the Midcoast & Islands region generated

# 917,600

room nights in paid accommodations in 2020







### JOBS SUPPORTED

The total economic impact of tourism in the Midcoast & Islands region supported

# 8,900

jobs in 2020







### WAGES GENERATED

## Tourism in the Midcoast & Islands region supported

## \$271,887,300

in wages and salaries in 2020







### VISITORS CREATE JOBS

### A Midcoast & Islands region job is supported by every

# 182

visitors







### HOUSEHOLD SAVINGS

Visitors to the Midcoast & Islands region saved local residents

# \$1,200

in taxes per household in 2020







### LODGING METRICS

Lodging Metrics <sup>1</sup>	2020
Occupancy (%)	36.1%
Average Daily Rate	\$109.26
Revenue per Available Room	\$39.44
Total Accommodations Revenue	\$100,259,700





### TRIP PLANNING CYCLE : PRE-VISIT







### TRIP PLANNING CYCLE

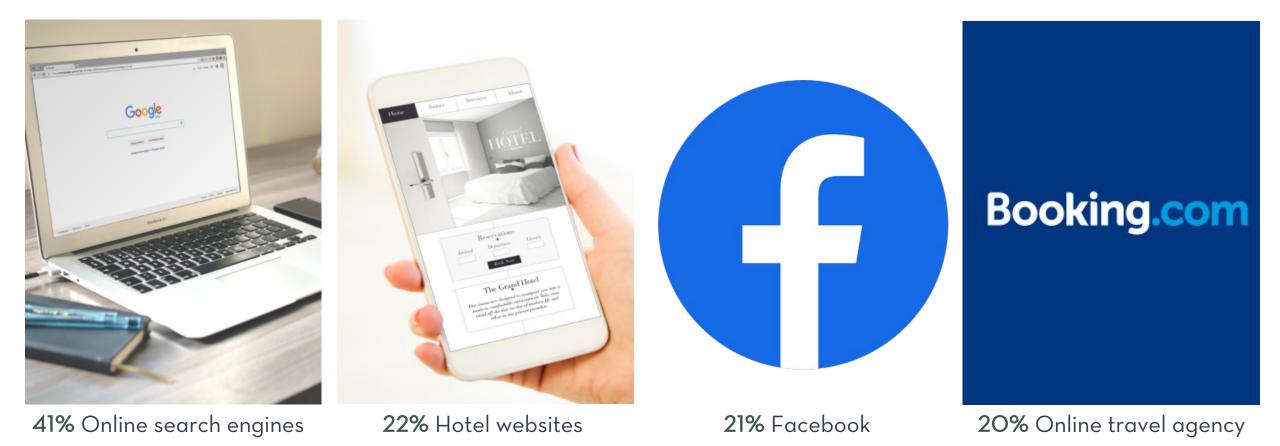
- 38% of visitors started
   planning their trip to the
   Midcoast & Islands less than
   a month in advance
- » Half of visitors booked their trip/decided to visit the Midcoast & Islands less than a month in advance







### **TOP ONLINE TRIP PLANNING SOURCES\***



\*Multiple responses permitted.



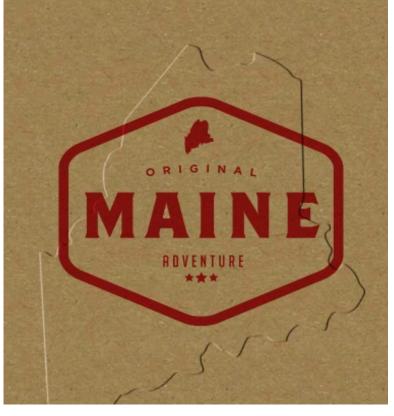
VISITMAINE.COM



## TOP OTHER TRIP PLANNING SOURCES\*



**45%** Advice from friends/family



14% Travel guides/brochures



### 10% Travel planning apps

\*Multiple responses permitted.





### TOP REASONS FOR VISITING\*



49% Vacation



28% Visiting friends/ relatives



26% Relax and unwind



22% Sightseeing/touring

\*Up to three responses permitted.





## CONSIDERING MAINE AS A DESTINATION

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

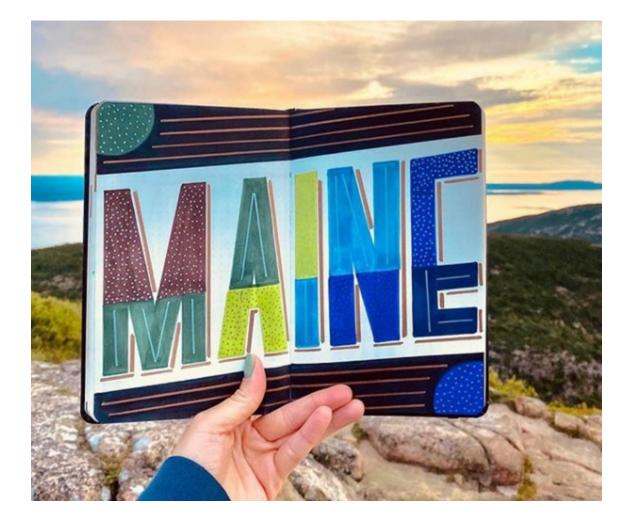






### PRE-TRIP EXPOSURE TO ADVERTISING

» 46% of visitors noticed advertisements, travel stories, or promotions about Maine prior to their trip to the Midcoast & Islands







### TOP SOURCES OF ADVERTISING EXPOSURE\*



42% Social media

38% Internet

**23%** Traveler reviews/blogs

23% Cable or satellite television

\*Multiple responses permitted.





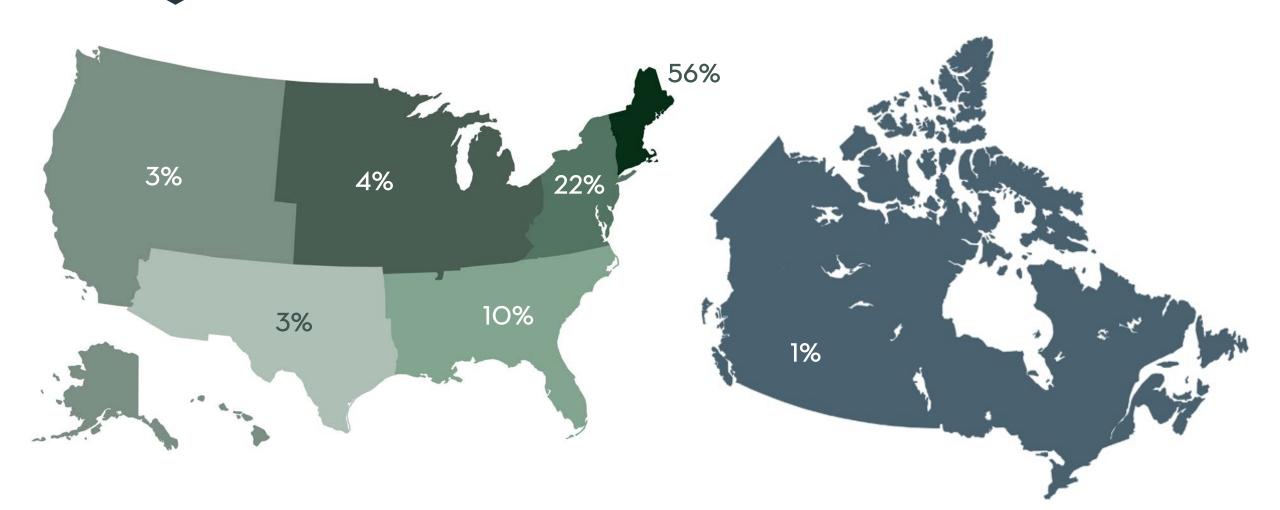
### TRIP PLANNING CYCLE : TRAVELER PROFILE







### **REGIONS OF ORIGIN**

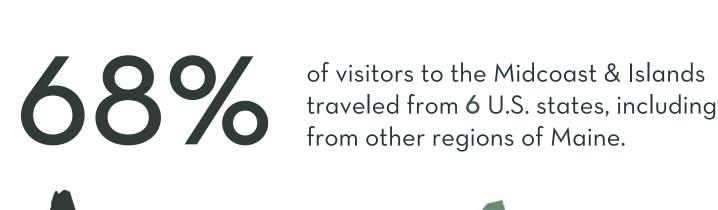


1% of visitors traveled to the Midcoast & Islands region from outside of the U.S. and Canada.



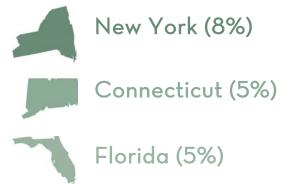


## TOP ORIGIN STATES & PROVINCES



Maine (29%) Massachusetts (12%)

New Hampshire (9%)







### TOP ORIGIN MARKETS







#### 8% New York City, NY

#### 7% Boston, MA

**3%** Washington D.C. – Baltimore, MD





### TRAVEL PARTIES

The typical visitor to the Midcoast & Islands traveled with **2.6** 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



53% Female\*



70% College/technical graduate



76% Married/domestic partnership



48% Employed full-time



89% White/Caucasian



\$89,300 annual household income





\*Of visitors interviewed

## VISITOR PROFILE: DAY TRIPPERS

- » The typical day tripper<sup>1</sup>:
  - » Earned \$70,700 per year
  - » Was female (59%)
  - » Had a college/technical degree (69%)
  - » Was married or living with their partner (71%)
  - » Was employed full-time (43%)
  - » Was White/Caucasian (92%)
  - » 22% traveled with children
  - » Was from Maine (78%) and other northeastern U.S. states (19%)



<sup>1</sup>Did not stay overnight in the Midcoast & Islands during their trip.





## VISITOR PROFILE: OVERNIGHT VISITORS

- » The typical overnight visitor<sup>1</sup>:
  - » Earned \$91,700 per year
  - » Was female (52%)
  - » Had a college/technical degree (70%)
  - » Was married or living with their partner (76%)
  - » Was employed full-time (48%)
  - » Was White/Caucasian (89%)
  - » 22% traveled with children
  - » Was from Maine (25%) and other northeastern U.S. states (49%)



<sup>1</sup>Stayed one or more nights in the Midcoast & Islands during their trip.





### **NEW & RETURNING VISITORS**

- » 1 in 5 visitors to the Midcoast & Islands were traveling in Maine for the first time
- » 1 in 3 visitors to the Midcoast & Islands had previously traveled in Maine more than 10 times







### TRIP PLANNING CYCLE : TRIP EXPERIENCE







### TRANSPORTATION

- » Almost 4 in 5 visitors drove to the Midcoast & Islands
- » 13% of visitors to the Midcoast & Islands flew to Maine through Portland International Jetport







# NIGHTS STAYED

- » 83% of visitors to the Midcoast & Islands spent one or more nights in Maine
- » Typical visitors to the Midcoast & Islands stayed
   5.4 nights in Maine







# TOP ACCOMMODATIONS



33% Hotel/motel/resort



17% Did not stay overnight



15% Friends/family home





# TOP IN-MARKET VISITOR RESOURCES\*



**46%** Navigation website/ apps

27% Restaurant website/ apps

21% Materials from hotel/ campground

\*Multiple responses permitted.





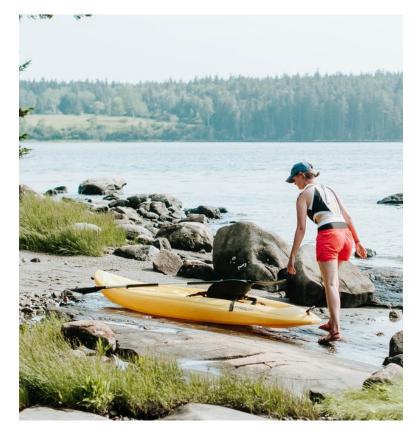
# TOP VISITOR ACTIVITIES\*



**75%** Food/beverage/culinary



70% Touring/sightseeing



58% 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 Midcoast & Islands
- » Visitors were more likely to visit U.S. states near Maine than they were to visit a Canadian province during their trip

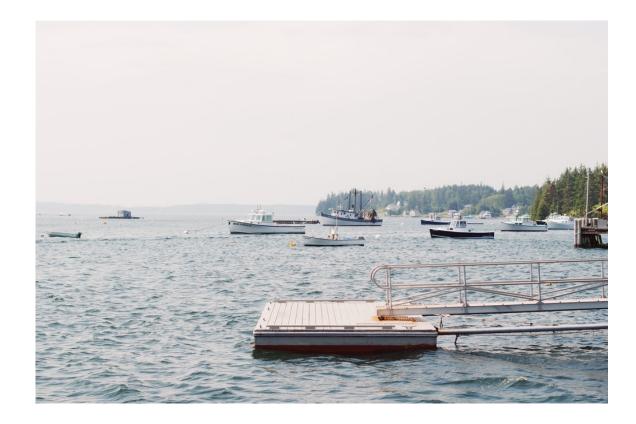






# TRAVELING WITHIN MAINE

- 87% of visitors traveled to regions other the Midcoast & Islands during their trip to Maine
- » Half of visitors to the Midcoast & Islands also visited Greater Portland & Casco Bay during their trip







# TRIP PLANNING CYCLE : POST-TRIP EVALUATION

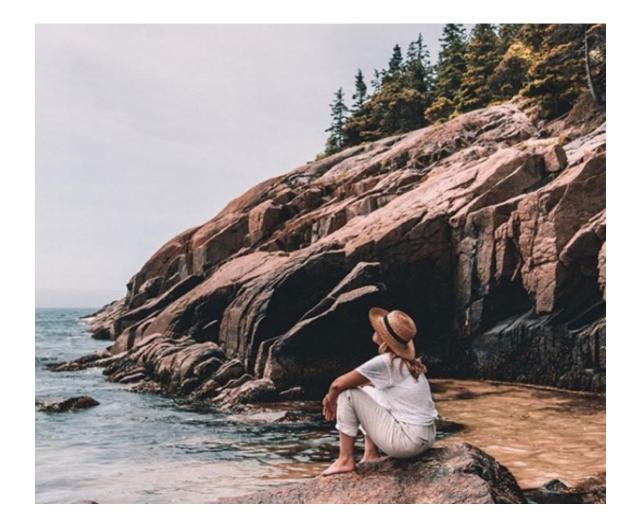






# **RECOMMENDING MAINE & ITS REGIONS**

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







# LIKELIHOOD OF RETURNING TO MAINE

» 97% of visitors to the Midcoast & Islands will return to Maine for a future visit or vacation







# 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

Economic Impact	2020
Visitors	1,621,800
Room nights generated	917,600
Direct expenditures	\$503,584,300
Total economic impact	\$780,555,700





#### IMPACT OF TOURISM

Maine Jobs	2020
Jobs generated (direct)	6,700
Total impact of tourism on Maine jobs	8,900
Maine Wages	2020
Wages paid (direct)	\$192,419,400
Total impact of tourism on Maine wages	\$271,887,300





#### IMPACT OF TOURISM

Return on Investment	2020
Visitors per job supported	182
State & local taxes supported	\$78,717,000
Tax savings per household	\$1,200





#### LODGING METRICS

Lodging Metrics <sup>1</sup>	2020	
Occupancy (%)	36.1%	
Average Daily Rate	\$109.26	
Revenue per Available Room	\$39.44	
Total Accommodations Revenue	\$100,259,700	





#### TRIP PLANNING CYCLE : PRE-VISIT



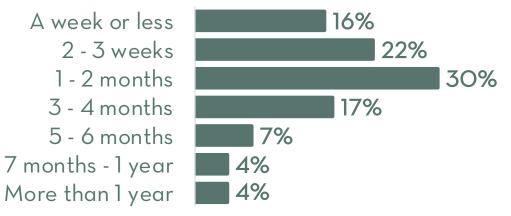




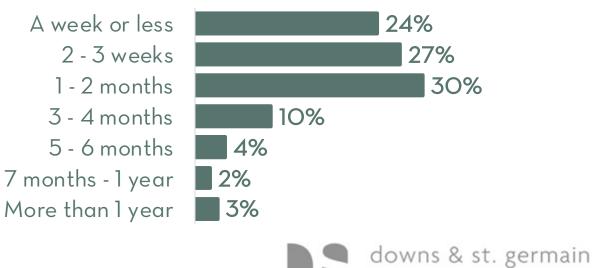
# TRIP PLANNING CYCLE

- 38% of visitors to the Midcoast & Islands started planning their trip within a month of their trip
- » 15% have planning windows longer than 4 months
- » Half 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



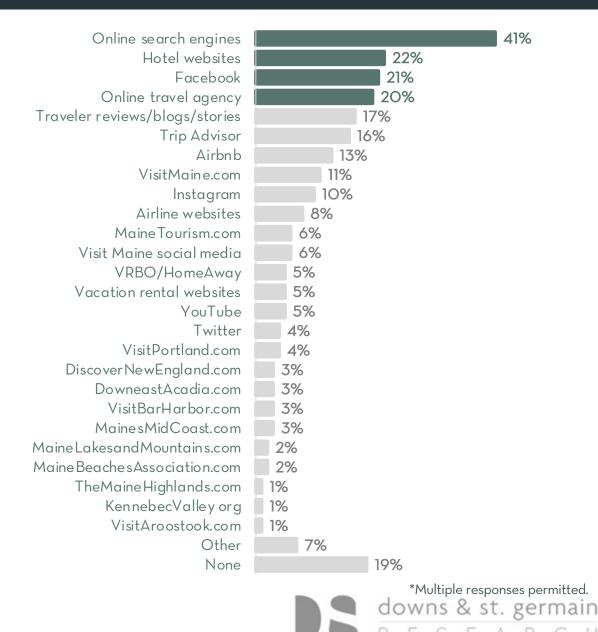
#### Booked Accommodations/Made Trip Decisions





# ONLINE TRIP PLANNING SOURCES\*

- » 4 in 5 visitors used one or more online resources to help them plan their trip to the Midcoast & Islands
- » 2 in 5 visitors used an online search engine, such as Google, to help them plan their trip
- » 1 in 10 visitors to the Midcoast & Islands used VisitMaine.com, and 6% used MaineTourism.com





# **OTHER TRIP PLANNING SOURCES\***

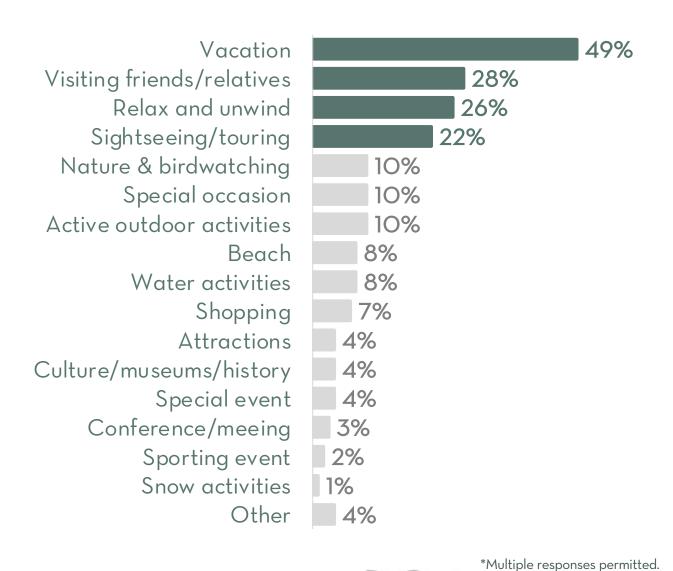
Advice from friends/family 45% 45% of visitors relied on **>>** Travel guides/brochures 14% advice from their friends Travel planning apps 10% Travel books & magazines 9% and family to help them Articles or travelogues 6% plan their trip to the ΔΔΔ 6% Visitor Guide 3% Midcoast & Islands 3% Travel agent Visit Maine e-Newsletter 3% 2% Called another Maine Tourism/Lodging Association 36% of visitors did not use **>>** Called local convention and visitors bureaus 2% any other resources to Called the Maine Office of Tourism 2% help them plan their trip Called local Chambers of Commerce 2% Other 5% to the Midcoast & Islands 36% None





# **REASONS FOR VISITING\***

- Half of visitors traveled to the Midcoast & Islands for a vacation
- » 28% of visitors came to the Midcoast & Islands to visit their friends and relatives, and 1 in 4 visitors came to relax/unwind



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# **OTHER STATES & PROVINCES CONSIDERED\***

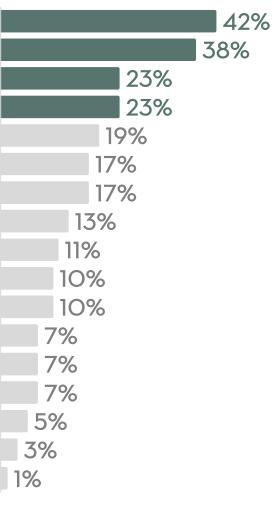
No other states/provinces 68% New Hampshire 15% Vermont 11% 2 in 3 visitors considered visiting **>>** Massachusetts 11% **ONLY** Maine while planning their New York 6% trip to the Midcoast & Islands Rhode Island 4% 3% Connecticut Visitors were more likely to consider Nova Scotia 2% **>>** visiting nearby U.S. states rather Quebec 2% New Brunswick 1% than visiting a Canadian province Newfoundland and Labrador 1% 1% Ontario Prince Edward Island 1% 5% Other



# PRE-TRIP EXPOSURE TO ADVERTISING\*

- » **46%** of visitors noticed advertising or promotions for Maine prior to their trip to the Midcoast & Islands
- » Visitors who were exposed to this advertising primarily saw it on social media or the internet
- » Visitors to the Midcoast & Islands were exposed to more traditional media before their trip than visitors to other regions of Maine

Social media	
Internet	
Traveler reviews/blogs	
Cable or satellite television	
Magazine	
Maine travel/visitor guide	
Radio	
VisitMaine.com	
Newspaper	
Online streaming service	
Brochure	
Music/podcast streaming	7
Billboard	7
AAA	7
Deal - based promotion	5%
Other	3%
Not sure	1%



\*Multiple responses permitted. wns & st. germain



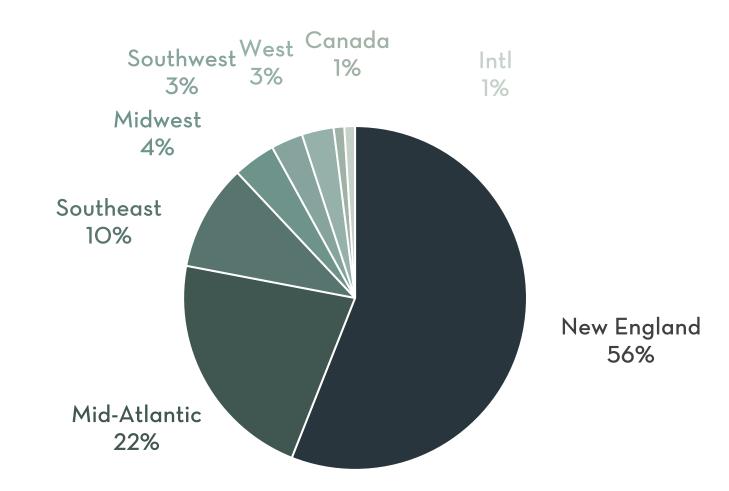
## TRIP PLANNING CYCLE : TRAVELER PROFILE







#### VISITOR ORIGINS







# TOP ORIGIN STATES & PROVINCES

- » Half of visitors to the Midcoast & Islands were from Maine, Massachusetts, or New Hampshire
- » **85%** of visitors came from **13** U.S. states
- » **3 in 10** visitors to the Midcoast & Islands were traveling from another region of Maine

State/Country	Percent	
Maine	29%	
Massachusetts	12%	
New Hampshire	9%	
New York	8%	
Connecticut	5%	
Florida	5%	
New Jersey	4%	
Pennsylvania	3%	
Vermont	2%	
Texas	2%	
Virginia	2%	
Maryland	2%	
California	2%	





# TOP ORIGIN MARKETS

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

Market	Percent
New York City, NY	8%
Boston, MA	7%
Washington D.C. – Baltimore, MD	3%
Philadelphia, PA	2%
Portland, ME	2%
Auburn – Lewiston, ME	2%
Bangor, ME	2%
Providence, RI	2%
Augusta, ME	2%
Manchester, NH	2%





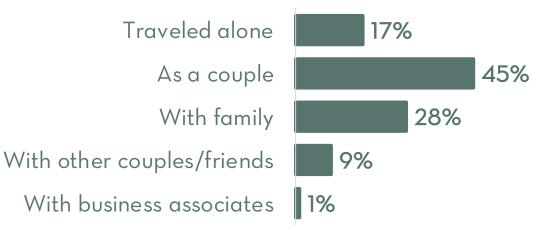
#### **TRAVEL PARTIES**

#### Travel Party Composition

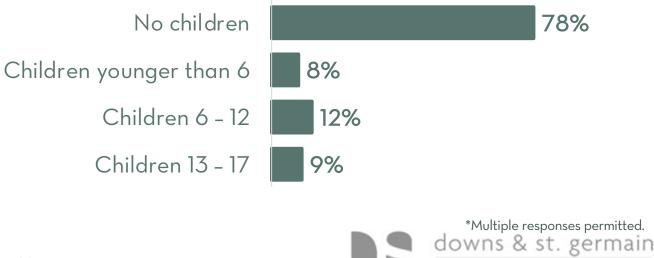
- » Typical visitors traveled in the Midcoast & Islands with a party of
   2.6 people
- » Nearly half of visitors traveled as a couple

» Only **22%** of visitors traveled in the Midcoast & Islands with one or more children in their travel party

MAINE.CON

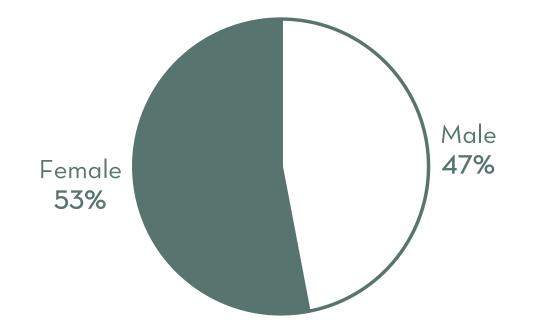






#### GENDER

 53% of visitors to the Midcoast & Islands who were interviewed were female

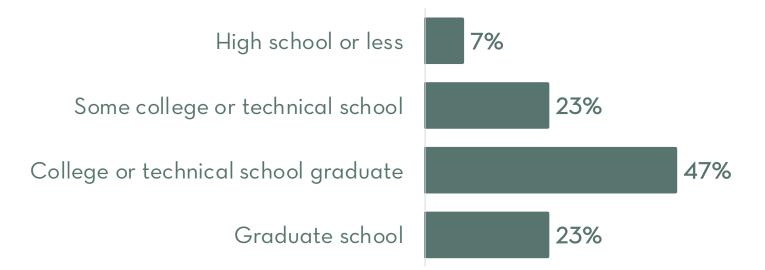






# EDUCATIONAL ATTAINMENT

 » Visitors to the Midcoast & Islands have substantial formal educations, with 7 out of 10 having a college or technical school degree, and 23% possessing a graduate degree

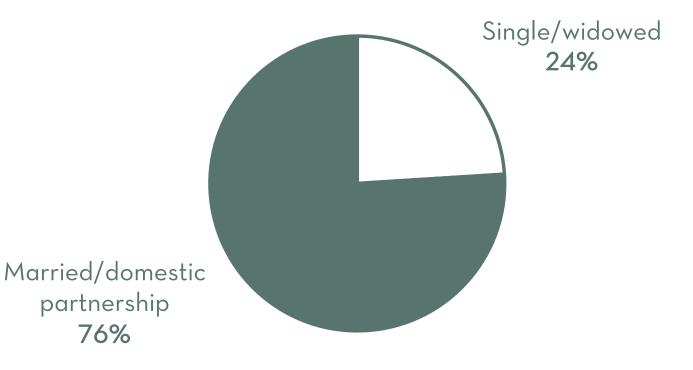






#### MARITAL STATUS

» **3 in 4** visitors to the Midcoast & Islands were married or living with their partner

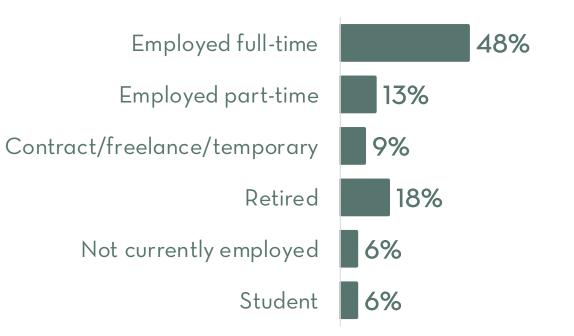






#### EMPLOYMENT STATUS

» 7 in 10 visitors to the Midcoast & Islands were employed, most fulltime

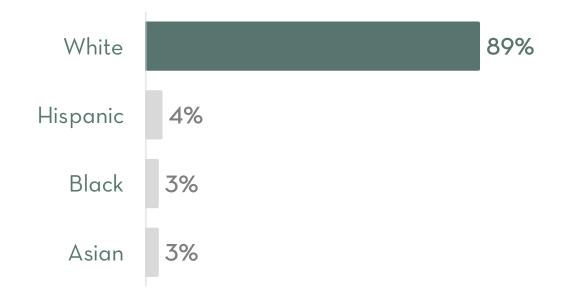






#### RACE & ETHNICITY

» 9 in 10 visitors to the Midcoast & Islands were White/Caucasian

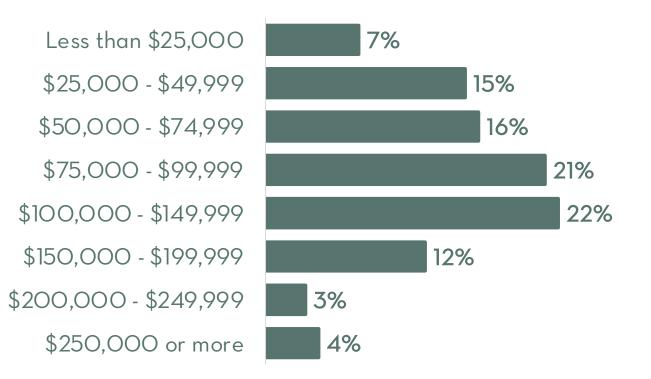






# HOUSEHOLD INCOME

- » Typical visitors to the Midcoast & Islands earned \$89,300 per year in household income
- » 1 in 5 visitors to the Midcoast & Islands have household incomes that exceed \$150,000

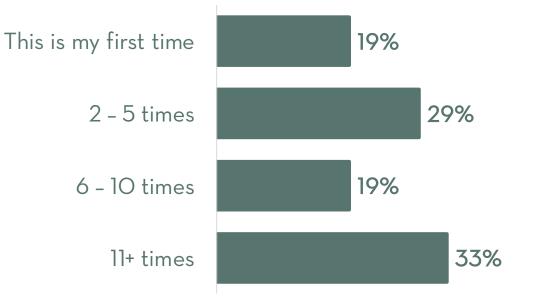






### **NEW & RETURNING VISITORS**

- » 1 in 5 visitors to the Midcoast & Islands were traveling in Maine for the first time
- » 1 in 3 visitors to the Midcoast & Islands had previously traveled in Maine more than 10 times







#### TRIP PLANNING CYCLE : TRIP EXPERIENCE







#### MODES OF TRANSPORTATION

- » The Midcoast & Islands is a drive-market for most visitors as almost 4 in 5 choose to travel by car rather than by plane, motor coach/bus, or train
- » Most visitors to the Midcoast & Islands who flew to Maine arrived at Portland International Jetport

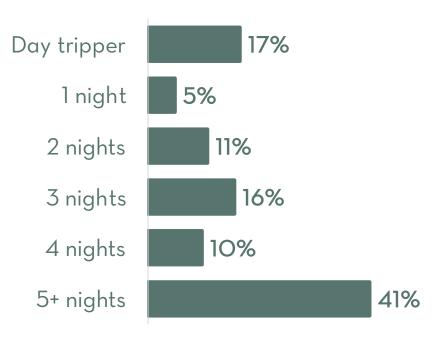
Drove to Maine	79%
Portland International Jetport	13%
Bangor International Airport	3%
Boston Logan International Airport	4%
Motor coach/bus	0%
Train	0%
Other	1%





#### NIGHTS STAYED

- 83% of visitors to the Midcoast & Islands stayed one night or more in Maine during their trip
- » Typical visitors to the Midcoast & Islands stayed **5.4** nights
- » 41% of visitors to the Midcoast & Islands stayed 5 or more nights







#### ACCOMMODATIONS

- » 1 in 3 visitors to the Midcoast & Islands stayed overnight in a hotel, motel, or resort
- » 1 in 6 visitors to the Midcoast & Islands stayed overnight with friends or relatives

Hotel/motel/resort Friends/family home 15% Vacation rental home 11% Personal second home 8% Bed & Breakfast/Inn 6% 5% RV Park/Campground Camping in the wilderness 2% Sporting camp/wilderness lodge 1% Other 2% 17% Did not stay overnight





33%

#### **BOOKING METHODS**

- » 60% of visitors to the Midcoast & Islands 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

Directly with the hotel/condo Online travel agency 24% Airbnb 15% Short term rental service 6% 3% Offline travel agent Vacation rental company 3% Travel package provider 2% 1% Group tour operator 5% Other





41%

#### IN-MARKET VISITOR RESOURCES\*

- » 46% of visitors used navigation websites and apps to plan activities during their trip to the Midcoast & Islands
- » 16% of visitors did not use any resources to plan activities while they were in the Midcoast & Islands

Navigation website/apps Restaurant website/app Materials from hotel/campground Visitor Information Centers Personal social media Destination social media Trip planning app Hotel/resort website/app Visit Maine.com Booking website/app Airline website/app Chambers of Commerce VisitBarHarbor.com Other None

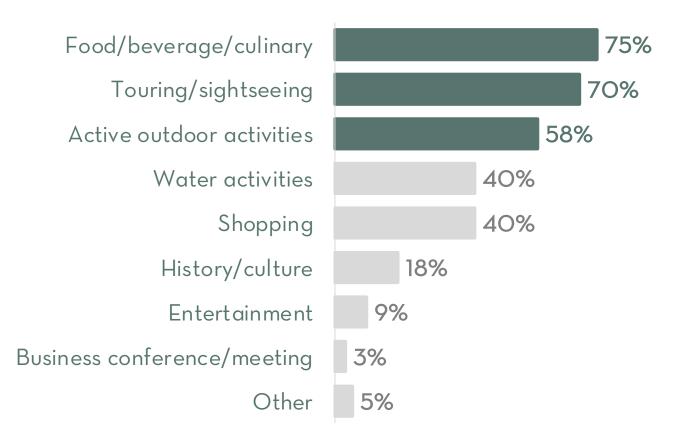
	46%
27%	
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20%	
17%	
16%	
15%	
9%	
9%	
7%	
4%	
3%	
%	
6%	
16%	





## VISITOR ACTIVITIES\*

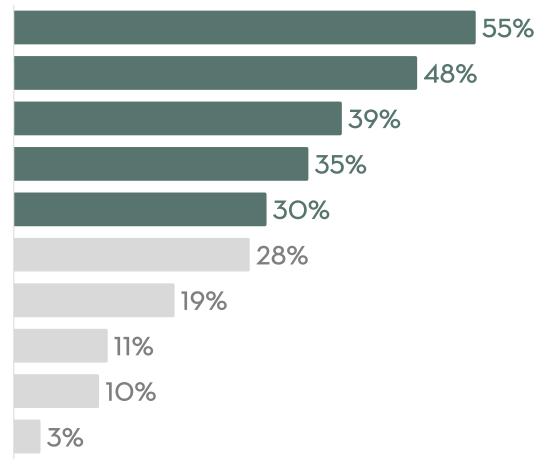
- » **3 in 4** of visitors participated in food, beverage, and culinary activities during their trip in the Midcoast & Islands
- » 7 in 10 visitors to the Midcoast & Islands engaged in sightseeing/touring activities during their trip





#### FOOD & BEVERAGE ACTIVITIES\*

Ate lobster Ate other local seafood Going to local brew pubs/craft breweries Consumed other locally produced Maine foods Ate farm-to-table or organic cuisine Enjoyed unique Maine food or beverages Enjoyed high-end cuisine or five-star dining Visited Farmer's Markets Enjoying local food at fairs/festivals Other



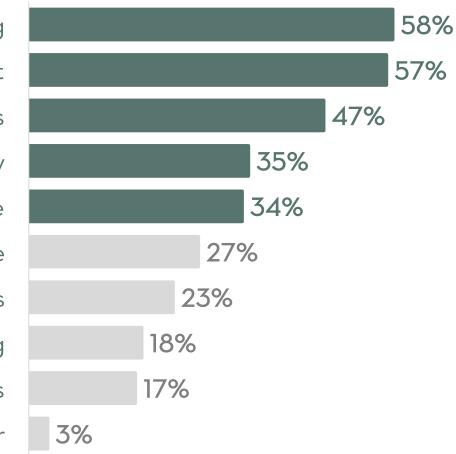
\*Multiple responses permitted. & st. ger

main



#### **TOURING & SIGHTSEEING ACTIVITIES\***

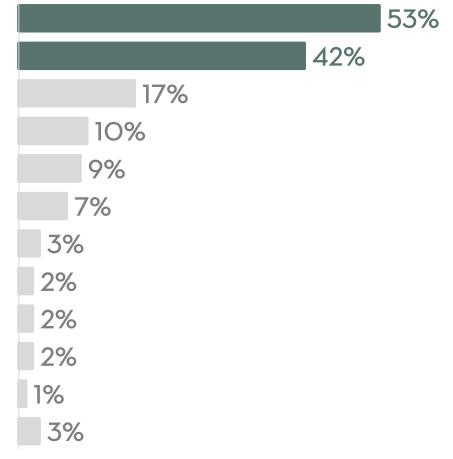
Sightseeing Enjoying the ocean views/rocky coast Enjoying the mountain views Photography Driving for pleasure Tours of communities/local architecture Viewing fall colors Wildlife viewing/bird watching Nature cruises or tours 3% Other





#### ACTIVE OUTDOOR ACTIVITIES\*

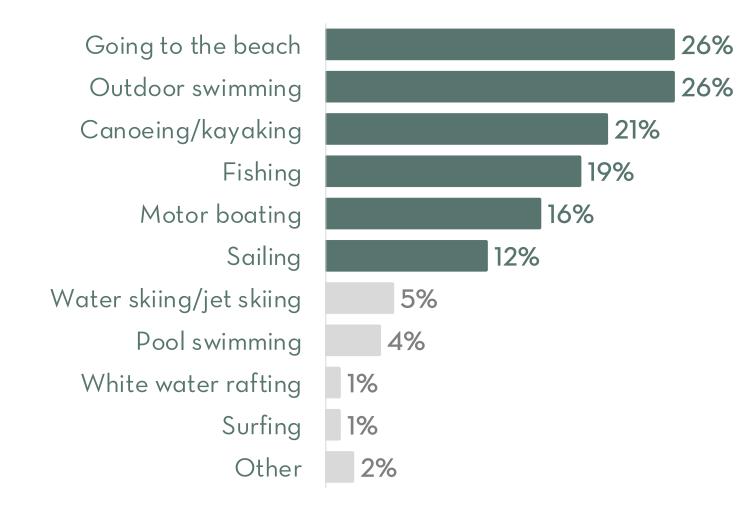
Hiking/climbing/backpacking Exploring State and National Parks Camping Bicycling touring Mountain/Fat Biking Riding all-terrain vehicles Hunting Snowmobiling Alpine skiing/snowboarding Snowshoeing Nordic skiing Other







#### WATER ACTIVITIES\*







#### SHOPPING ACTIVITIES\*

Shopping for unique/locally produced goods	21%
Shopping for gifts/souvenirs	18%
General shopping at malls/downtown	16%
Outlet shopping	14%
Shopping for antiques/local arts and crafts	14%
Shopping for "Made in Maine" products	13%
Other	2%

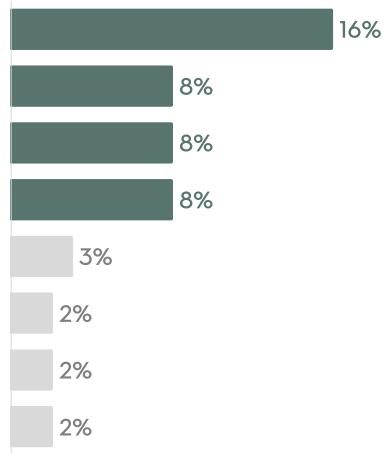


\*Multiple responses permitted. downs & st. germain

RESEARCH

## HISTORICAL & CULTURAL ACTIVITIES\*

Visit historic sites/museums	
Visit art museums/local artisan studios	
Painting/drawing/sketching	
Get to know the local people and/or culture	
Attend plays/musicals/theatrical events	
Attend popular music concerts/events	29
Attend operas/classical music events	29
Participate in nightlife/other evening entertainment	29

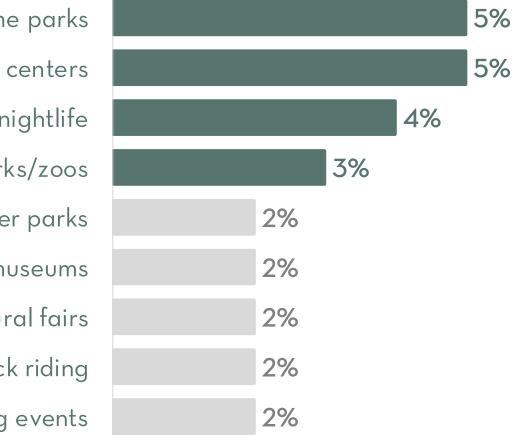






#### ENTERTAINMENT ACTIVITIES\*

Amusement/theme parks Outdoor fun centers Bars/nightlife Animal parks/zoos Water parks Children's museums Agricultural fairs Horseback riding Attend sporting events





## **OTHER STATES & PROVINCES VISITED\***

- » 3 in 4 visitors did not visit any other U.S. state or Canadian province on their trip to the Midcoast & Islands
- » 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

No other states/provinces	75%
New Hampshire	16%
Massachusetts	11%
Vermont	6%
New York	5%
Rhode Island	4%
Connecticut	3%
Ontario	1%
New Brunswick	1%
Nova Scotia	1%
Quebec	1%
Prince Edward Island	1%
ewfoundland and Labrador	1%
Other	1%

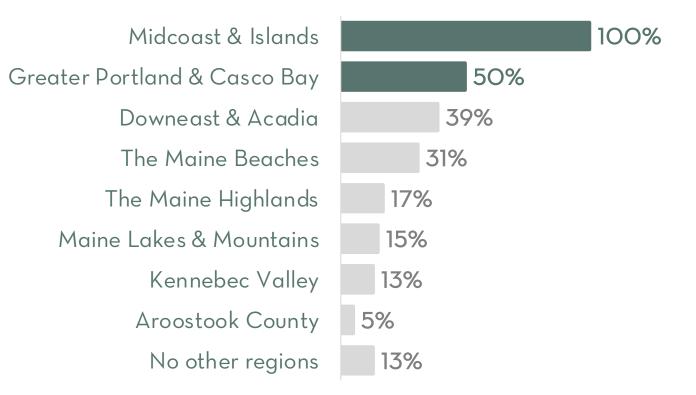




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### **REGIONS VISITED WITHIN MAINE\***

- » **87%** of visitors to the Midcoast & Islands traveled through out the state during their trip in Maine, rather than staying within the region for the entirety of their trip
- » Half of visitors to the Midcoast & Islands also visited Greater
   Portland & Casco Bay during their trip in Maine





#### TRIP PLANNING CYCLE : POST-TRIP EVALUATION

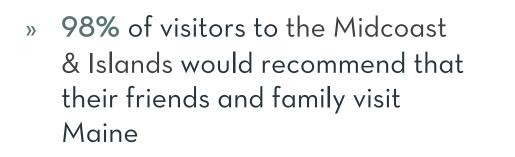


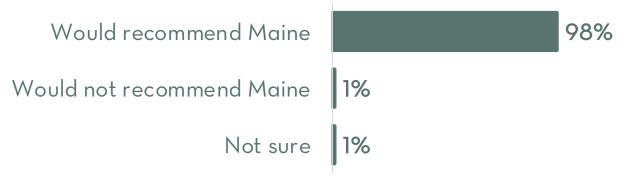




#### **RECOMMENDING MAINE & ITS REGIONS**

#### Likelihood of Recommending Maine





#### » 99% of visitors would recommend that their friends and family visit the Midcoast & Islands

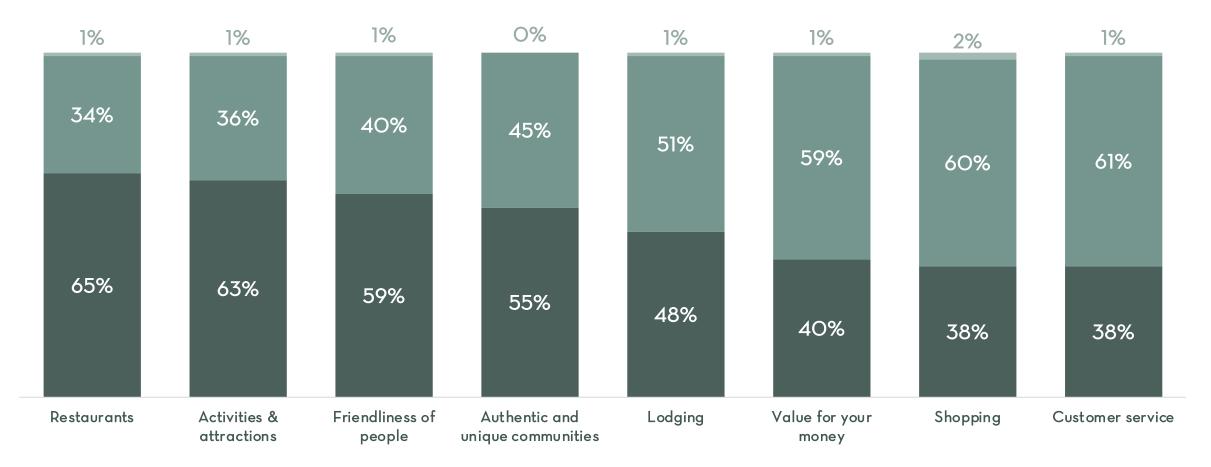
#### Likelihood of Recommending the Midcoast & Islands





#### TRIP EXPECTATIONS

VISITMAINE.COM



Exceeded Expectations
Met Expectations

ons Did not meet expectations

"Don't know" responses omitted.



#### LIKELIHOOD OF RETURNING TO MAINE

» 97% of visitors to the Midcoast & Islands will return to Maine for a future visit or vacation







# MIDCOAST & ISLANDS

2020 Visitor Tracking & Economic Impact Report January – December 2020

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