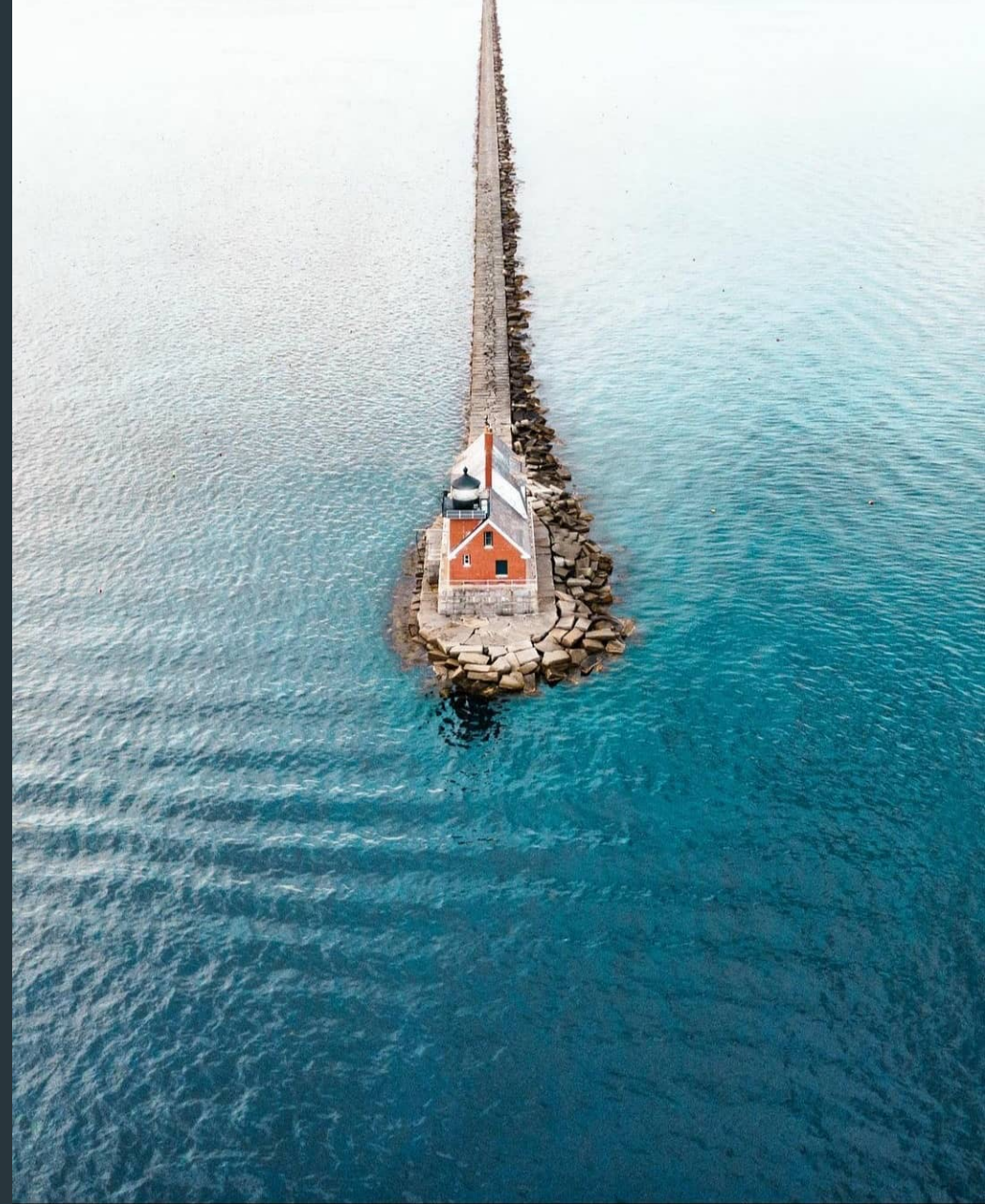


MIDCOAST & ISLANDS

2020 Economic Impact & Visitor Tracking Report
January - December 2020

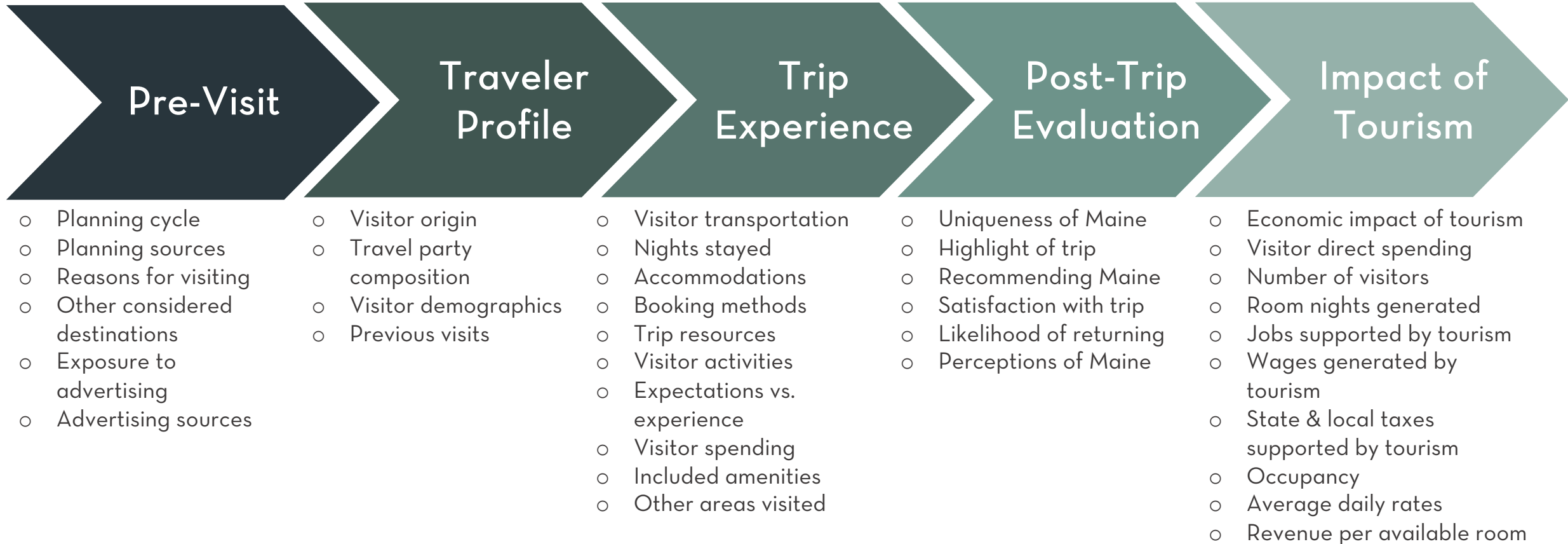


INTRODUCTION



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.



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 1st and December 31st, 2020.*

Economic Impact

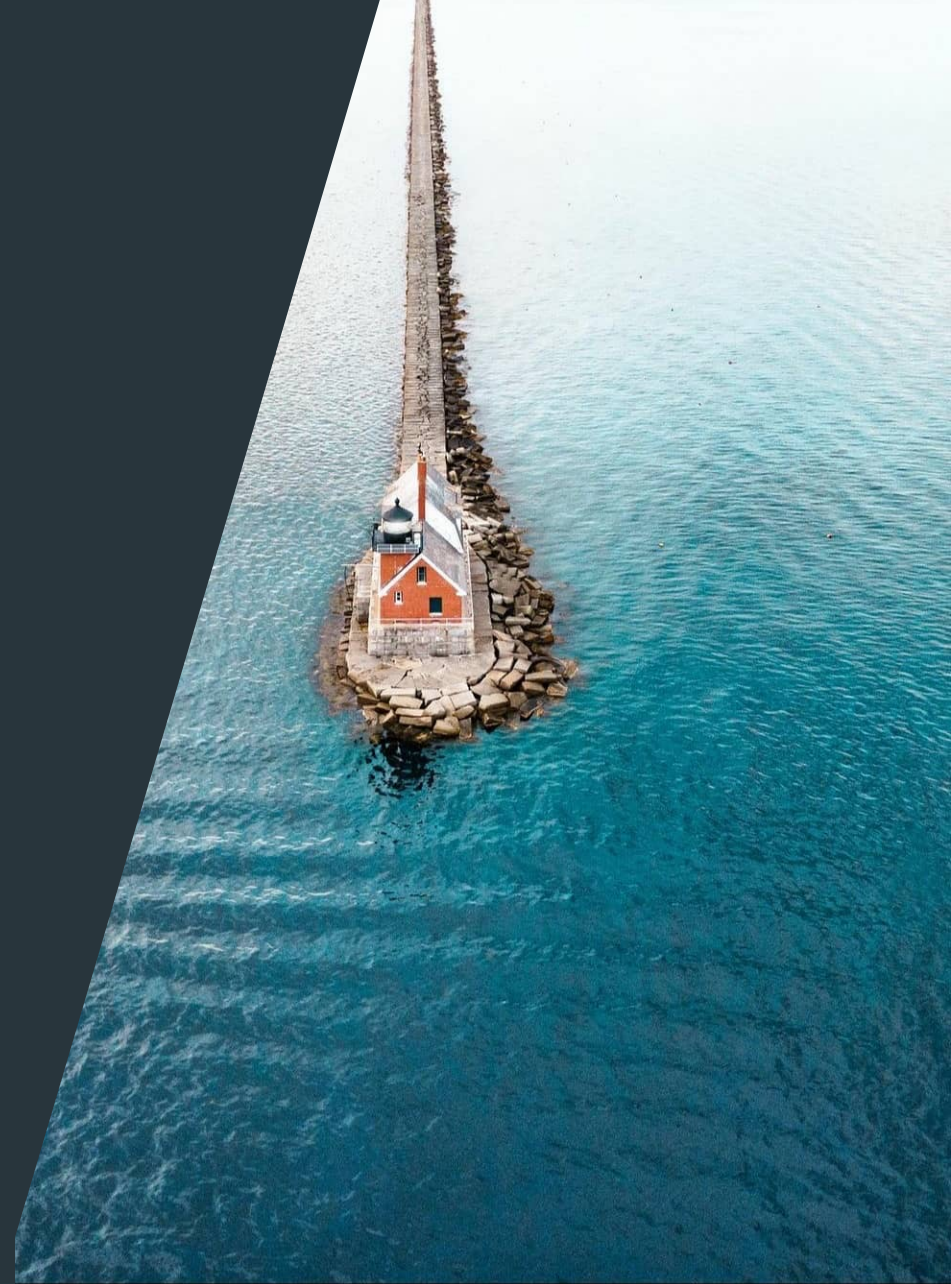
Total economic impact of tourism on the Midcoast & Islands is a function of direct spending by visitors to the region, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

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.

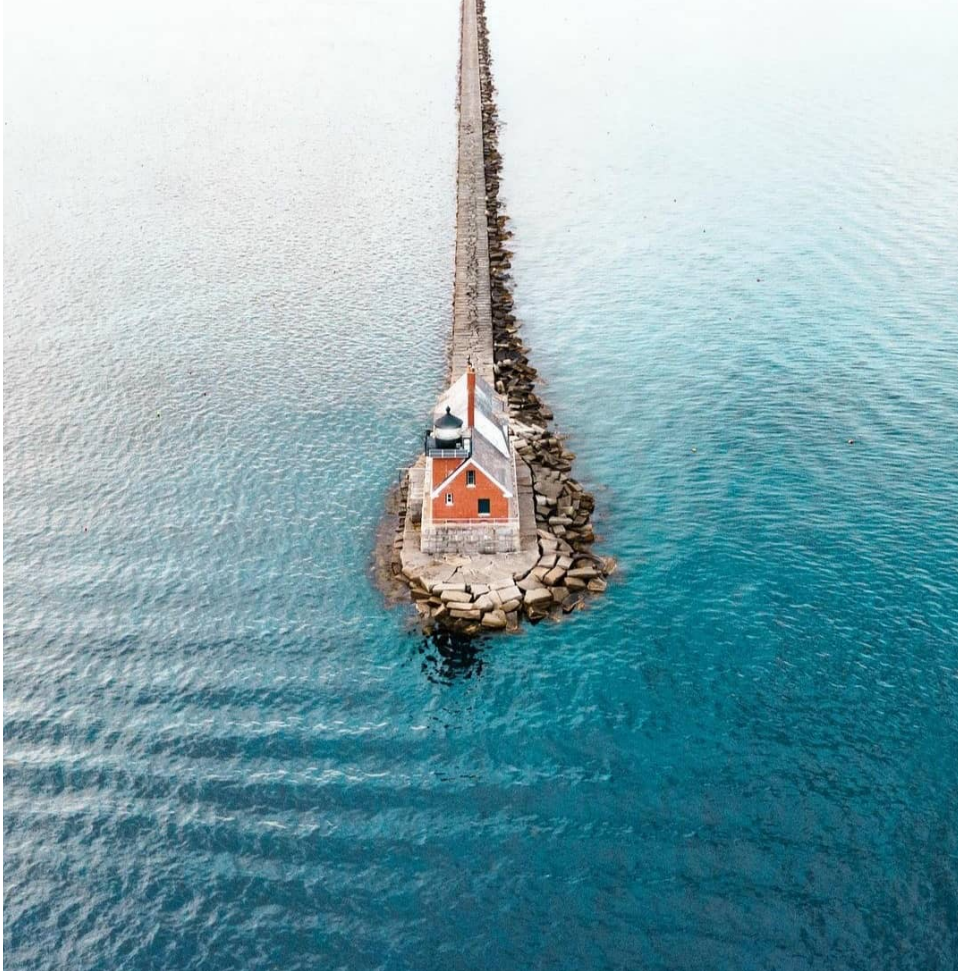
PRESENTATION VERSION



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.

MIDCOAST & ISLANDS



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

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

Visitor spending in 2020 generated

\$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

<i>Lodging Metrics¹</i>	<i>2020</i>
<i>Occupancy (%)</i>	<i>36.1%</i>
<i>Average Daily Rate</i>	<i>\$109.26</i>
<i>Revenue per Available Room</i>	<i>\$39.44</i>
<i>Total Accommodations Revenue</i>	<i>\$100,259,700</i>

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*



41% Online search engines



22% Hotel websites



21% Facebook



20% Online travel agency

*Multiple responses permitted.

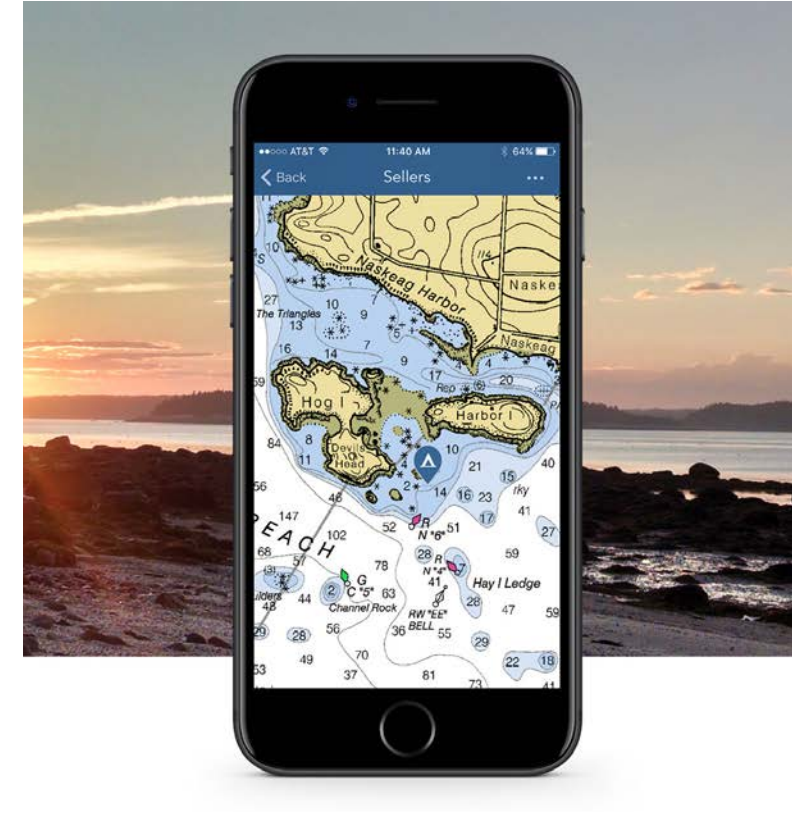
TOP OTHER TRIP PLANNING SOURCES*



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*



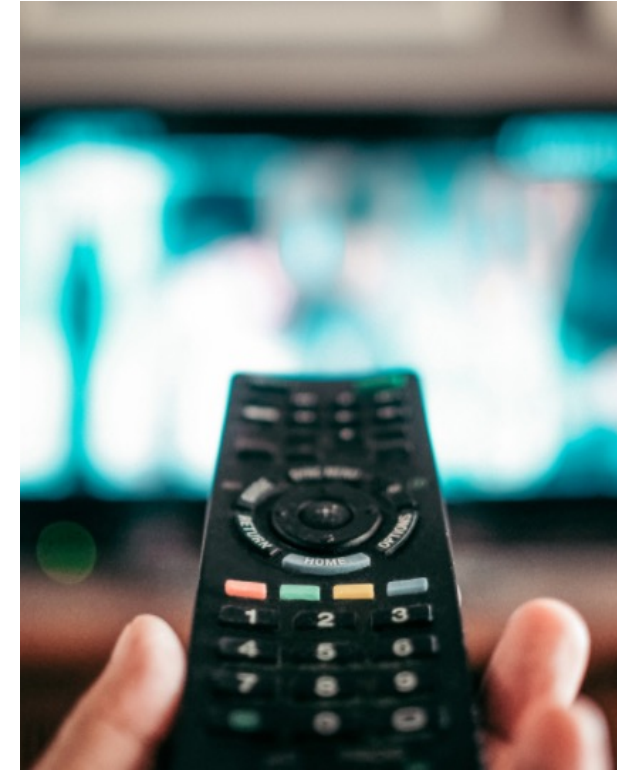
42% Social media



38% Internet



23% Traveler
reviews/blogs



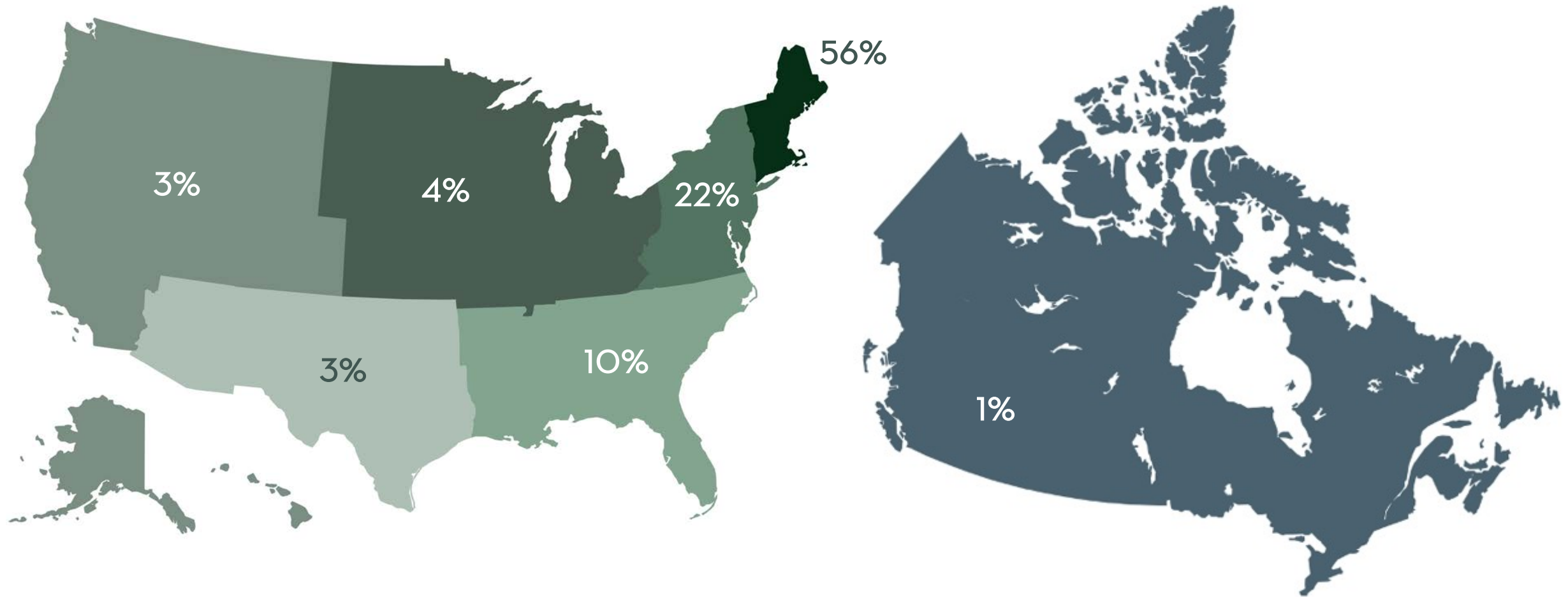
23% Cable or satellite
television

*Multiple responses permitted.

TRIP PLANNING CYCLE : TRAVELER PROFILE

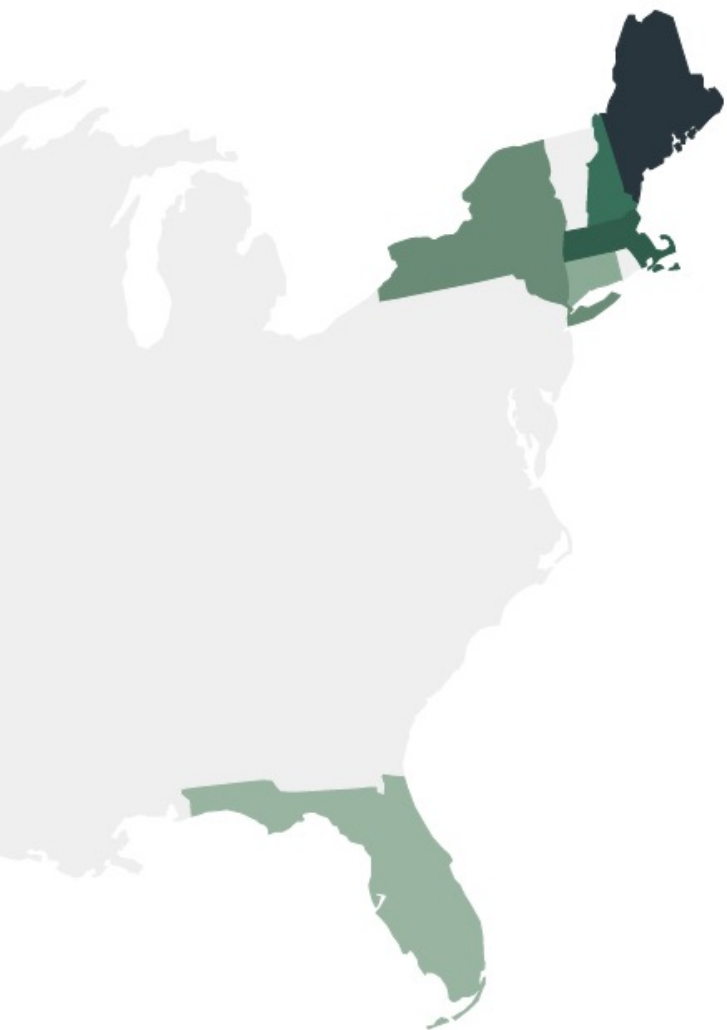


REGIONS OF ORIGIN



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

TOP ORIGIN STATES & PROVINCES



68%

of visitors to the Midcoast & Islands traveled from 6 U.S. states, including from other regions of Maine.



Maine (29%)



Massachusetts (12%)



New Hampshire (9%)



New York (8%)



Connecticut (5%)



Florida (5%)

TOP ORIGIN MARKETS



8% New York City, NY



7% Boston, MA



3% Washington D.C. –
Baltimore, MD

TRAVEL PARTIES

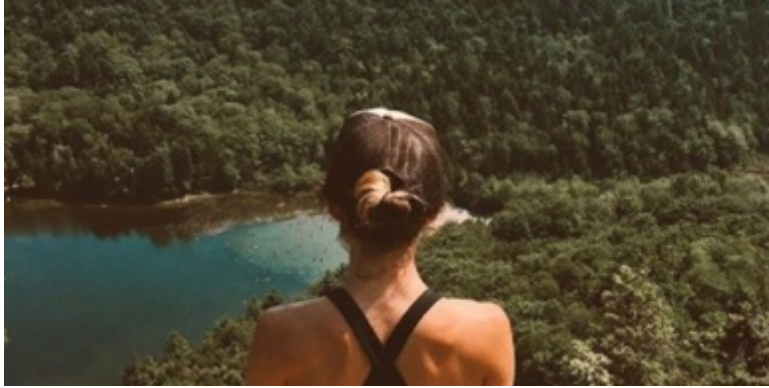
The typical visitor to the Midcoast & Islands traveled with **2.6** people in their visitor party



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 tripper¹:
 - » 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%)



¹ Did not stay overnight in the Midcoast & Islands during their trip.

VISITOR PROFILE: OVERNIGHT VISITORS

- » The typical overnight visitor¹:
 - » 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%)**



¹ 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.

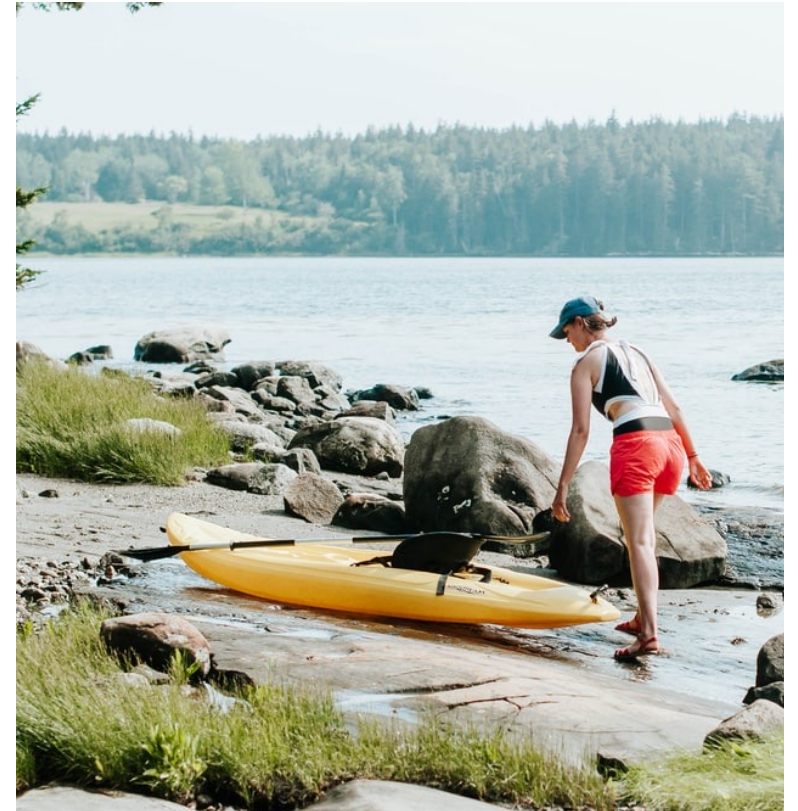
TOP VISITOR ACTIVITIES*



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 than 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

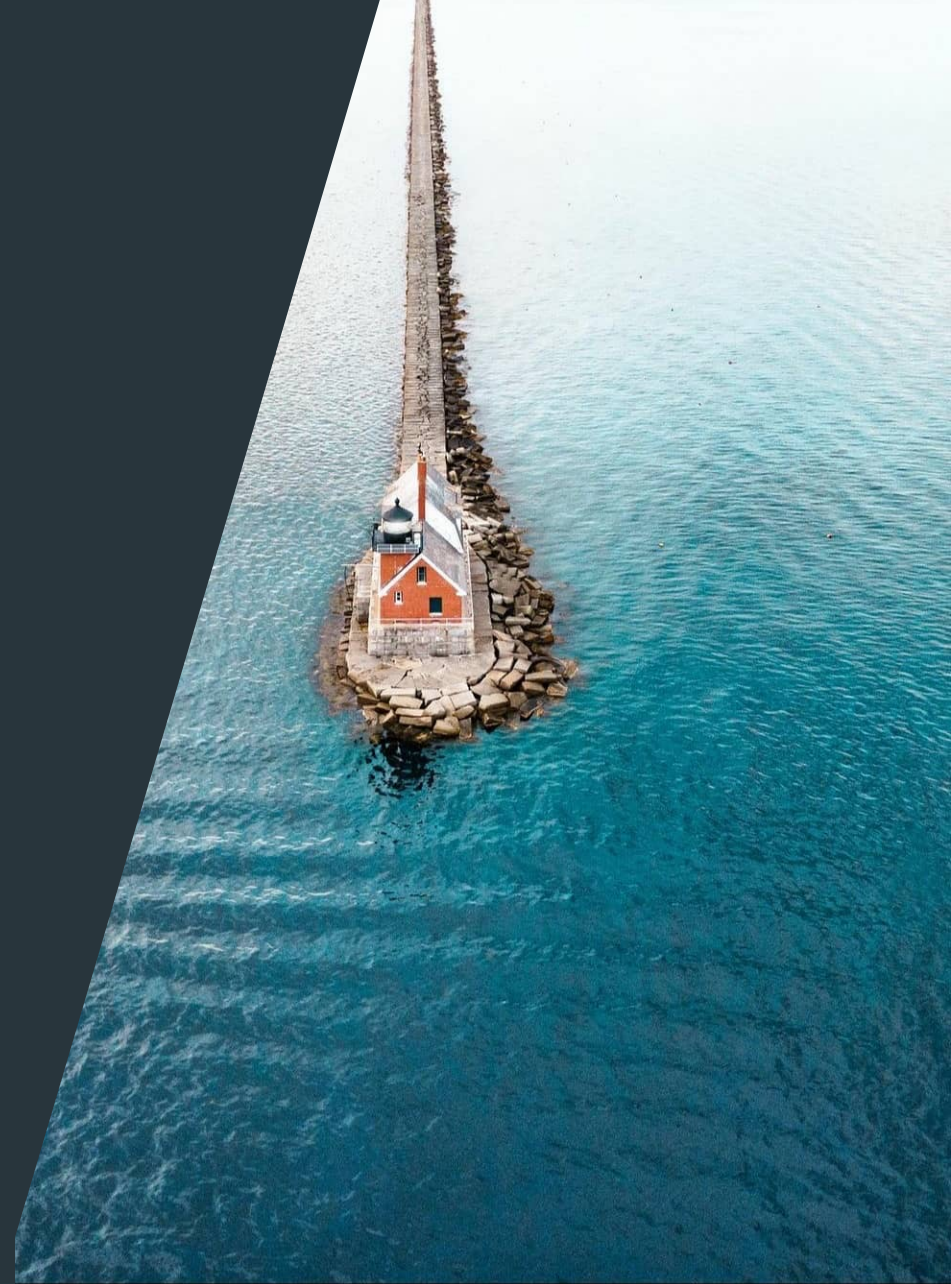


LIKELIHOOD OF RETURNING TO MAINE

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



DETAILED FINDINGS



DETAILED FINDINGS

This section of the report includes **detailed results** from the 2020 Economic Impact and Visitor Tracking Study, and can be used to take a deeper dive into the data.

TRIP PLANNING CYCLE : IMPACT OF TOURISM



ECONOMIC IMPACT INDICATORS

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

IMPACT OF TOURISM

<i>Maine Jobs</i>	<i>2020</i>
<i>Jobs generated (direct)</i>	<i>6,700</i>
<i>Total impact of tourism on Maine jobs</i>	<i>8,900</i>

<i>Maine Wages</i>	<i>2020</i>
<i>Wages paid (direct)</i>	<i>\$192,419,400</i>
<i>Total impact of tourism on Maine wages</i>	<i>\$271,887,300</i>

IMPACT OF TOURISM

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

LODGING METRICS

<i>Lodging Metrics¹</i>	<i>2020</i>
<i>Occupancy (%)</i>	<i>36.1%</i>
<i>Average Daily Rate</i>	<i>\$109.26</i>
<i>Revenue per Available Room</i>	<i>\$39.44</i>
<i>Total Accommodations Revenue</i>	<i>\$100,259,700</i>

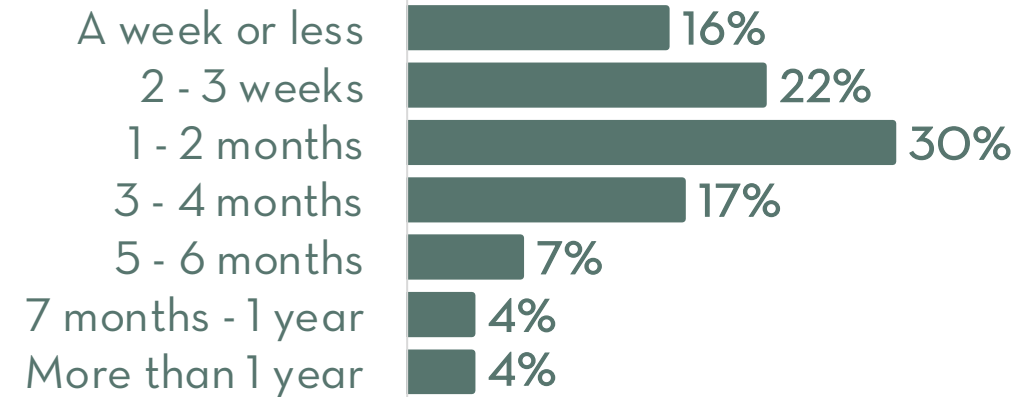
TRIP PLANNING CYCLE : PRE-VISIT



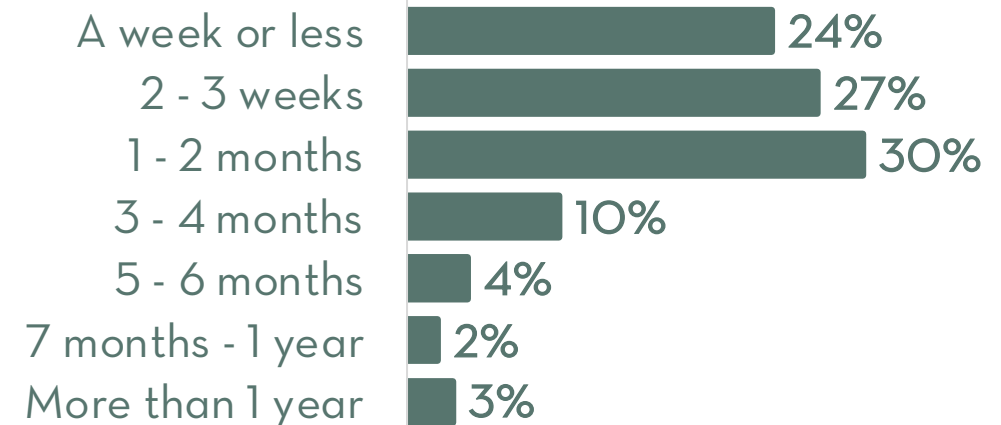
TRIP PLANNING CYCLE

- » **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

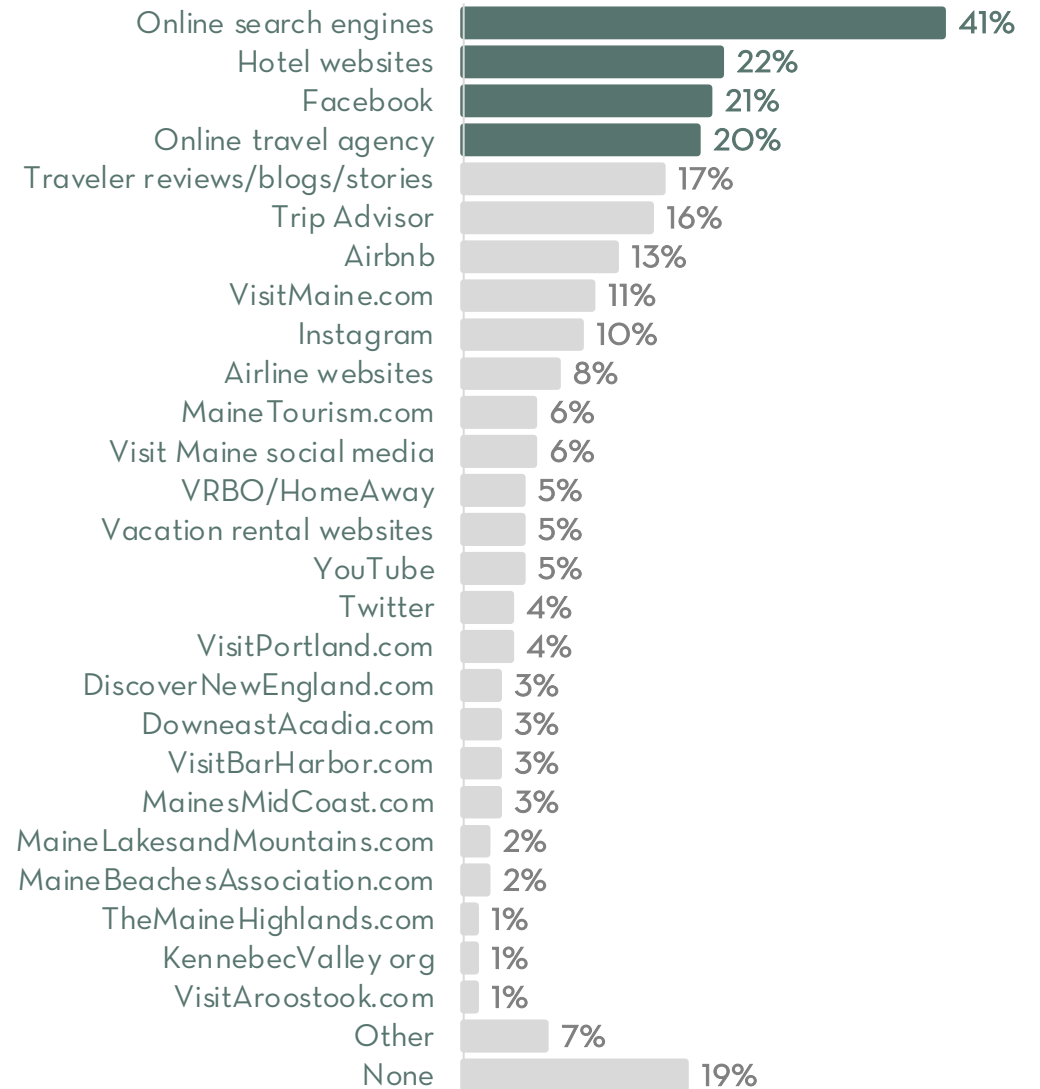


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

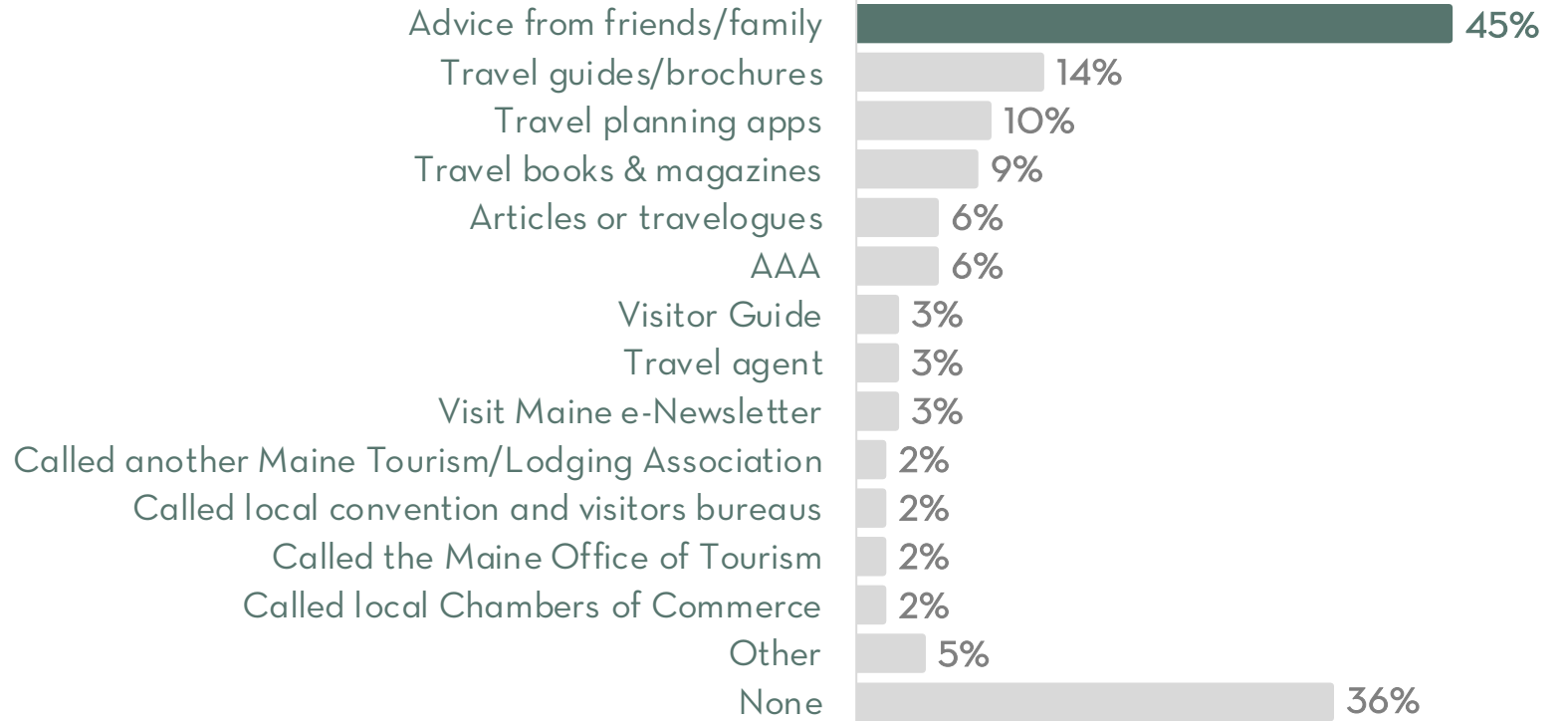
- » 4 in 5 visitors used one or more online resources to help them plan their trip to the Midcoast & Islands
- » 2 in 5 visitors used an online search engine, such as Google, to help them plan their trip
- » 1 in 10 visitors to the Midcoast & Islands used VisitMaine.com, and 6% used MaineTourism.com



*Multiple responses permitted.

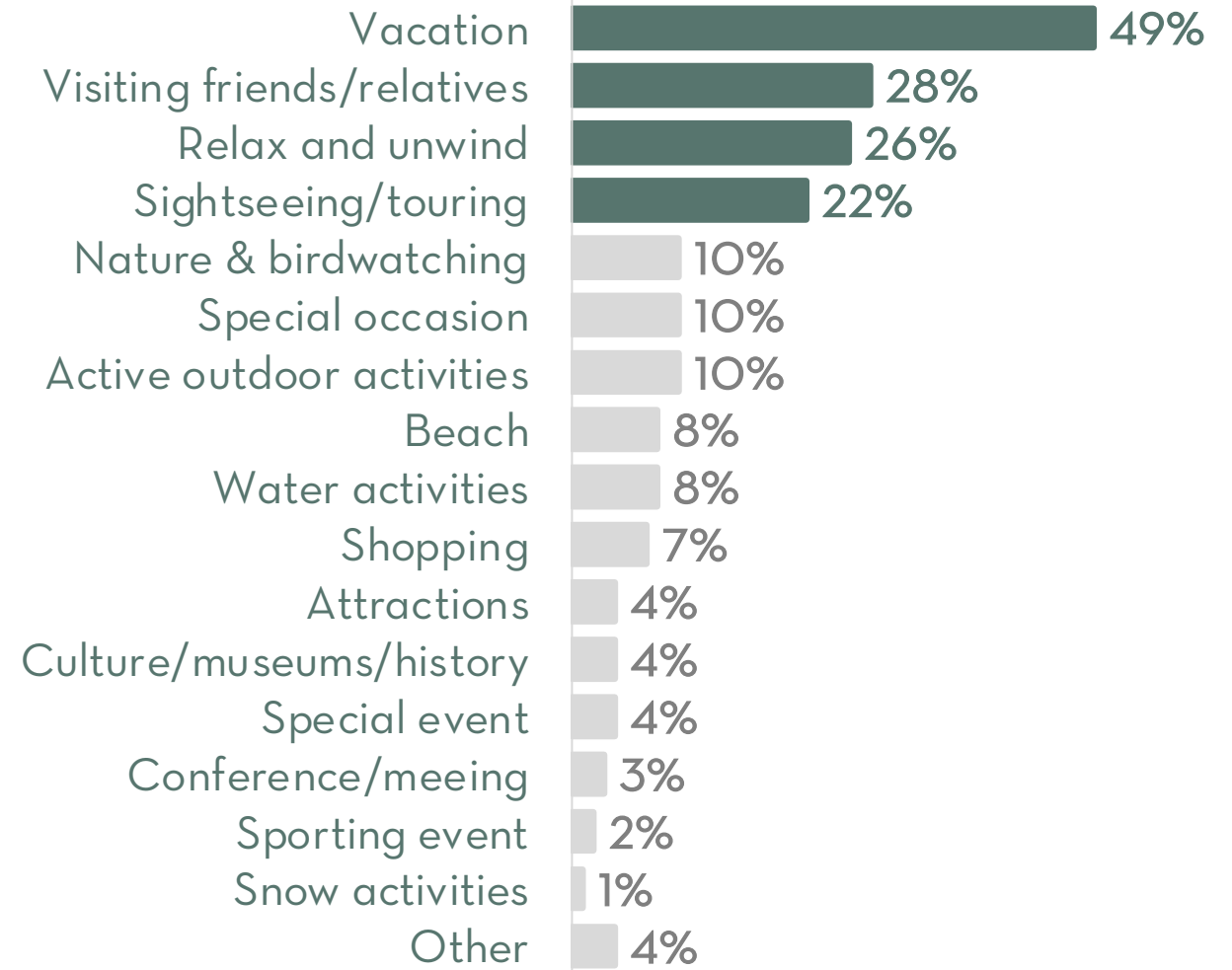
OTHER TRIP PLANNING SOURCES*

- » **45%** of visitors relied on advice from their friends and family to help them plan their trip to the Midcoast & Islands
- » **36%** of visitors did not use any other resources to help them plan their trip to the Midcoast & Islands



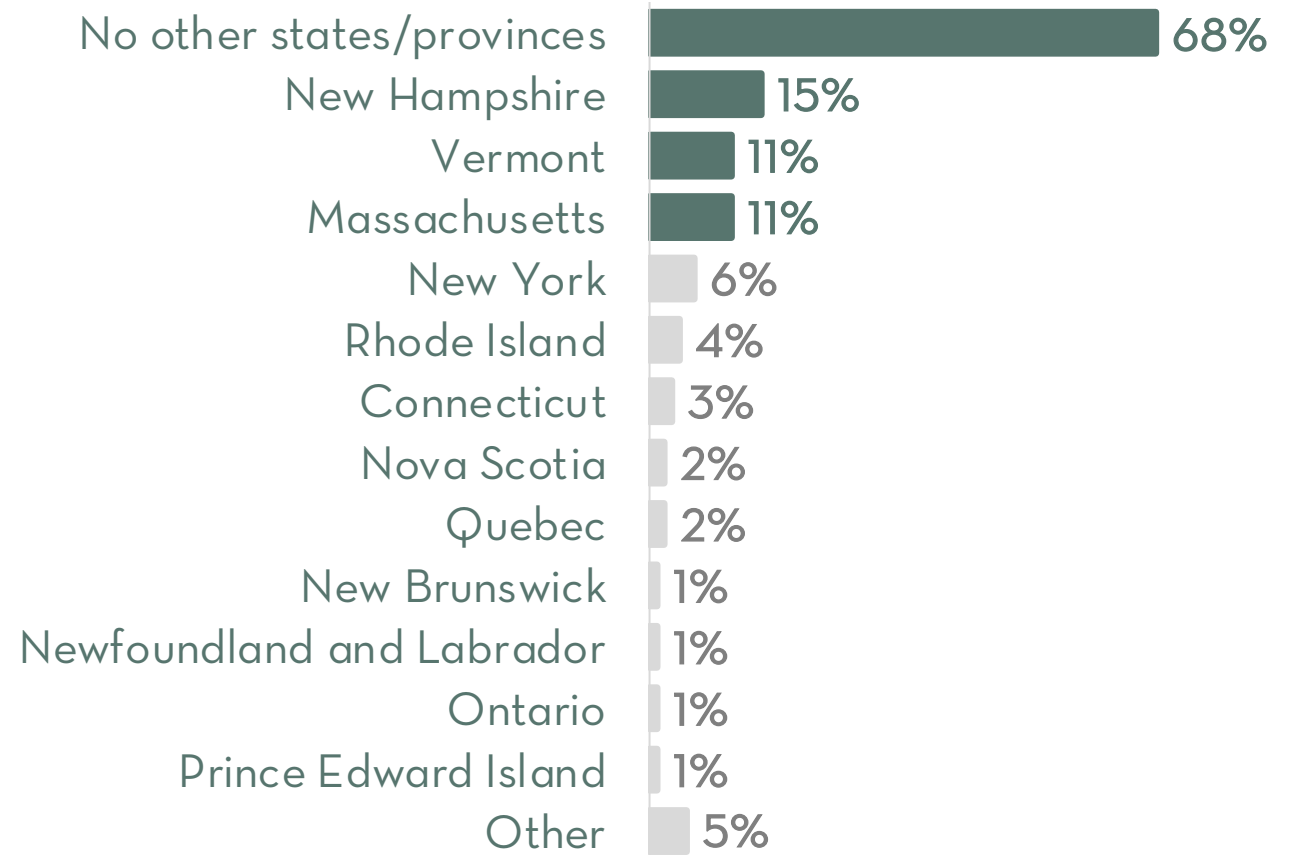
REASONS FOR VISITING*

- » **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



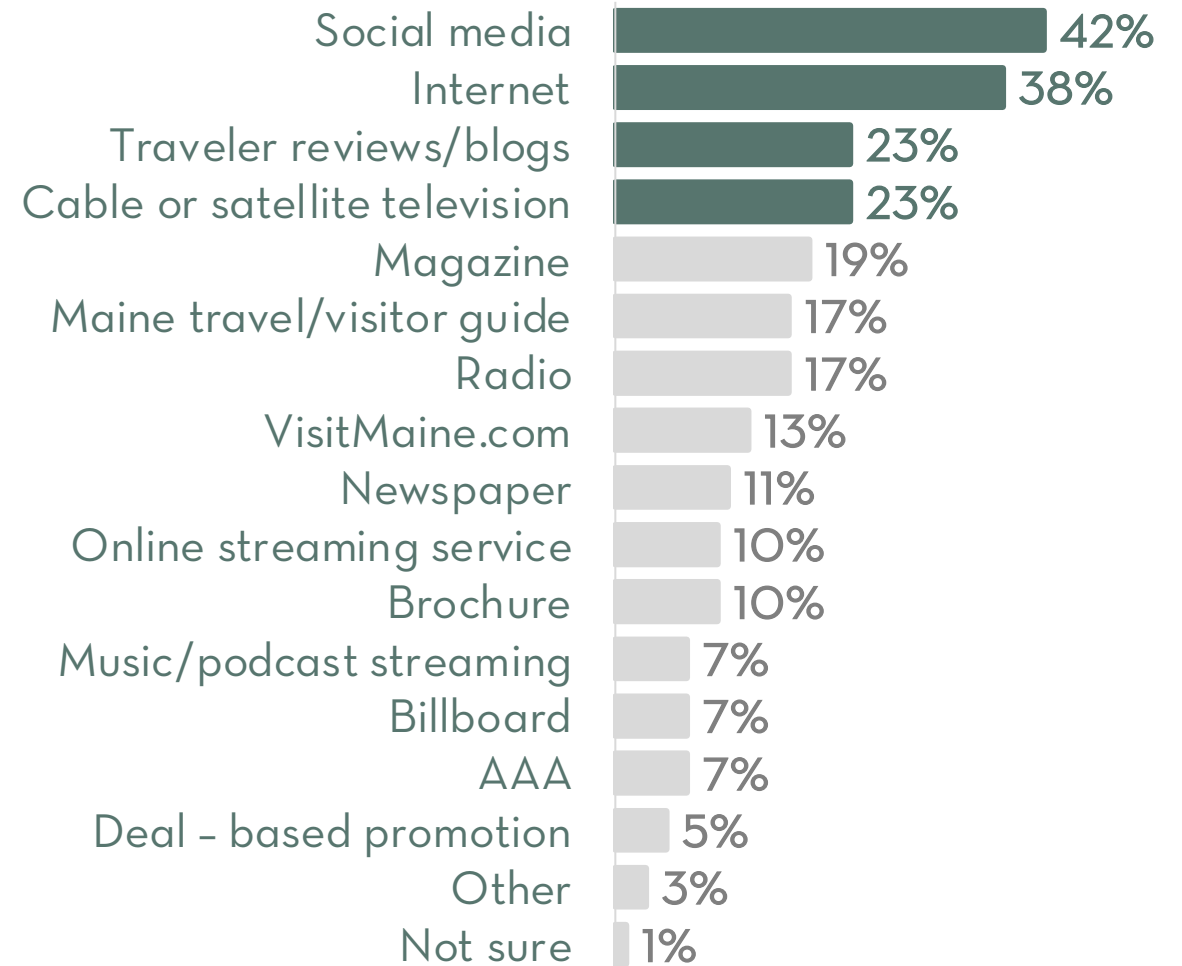
OTHER STATES & PROVINCES CONSIDERED*

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



PRE-TRIP EXPOSURE TO ADVERTISING*

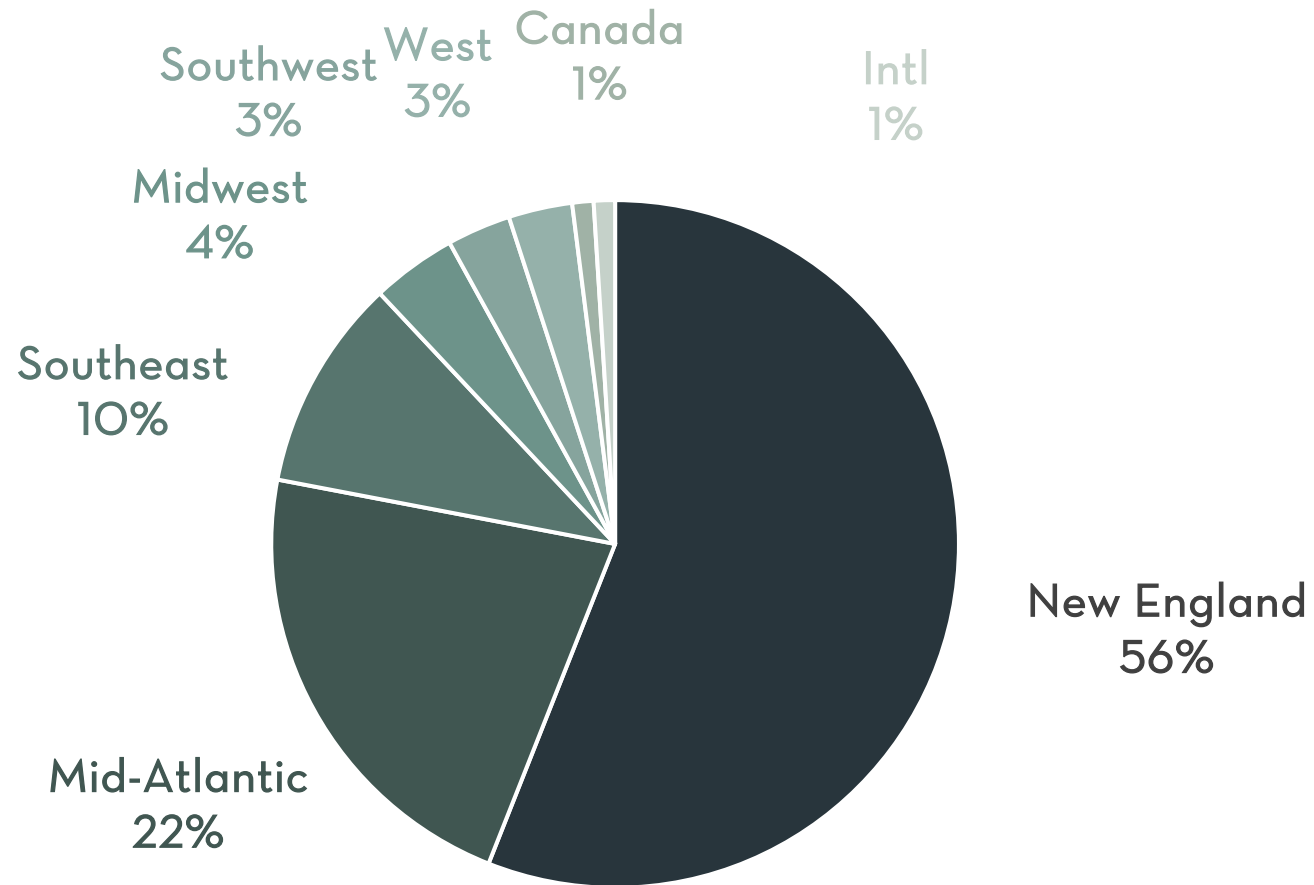
- » 46% of visitors noticed advertising or promotions for Maine prior to their trip to the Midcoast & Islands
- » Visitors who were exposed to this advertising primarily saw it on **social media** or the **internet**
- » Visitors to the Midcoast & Islands were exposed to more **traditional media** before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



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

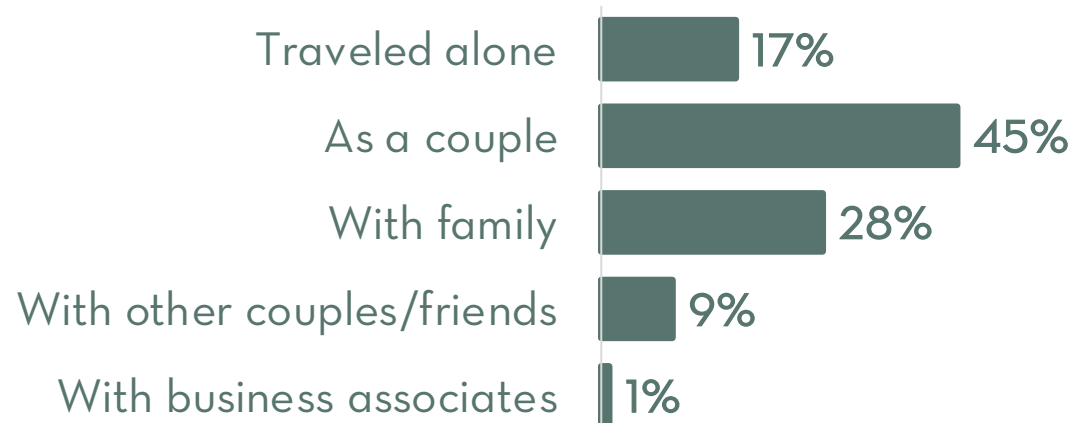
- » More visitors traveled to the Midcoast & Islands from the **New York City metro area** than from any other market
- » **1 in 3** visitors traveled from **10** markets in Maine and other U.S. states

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%

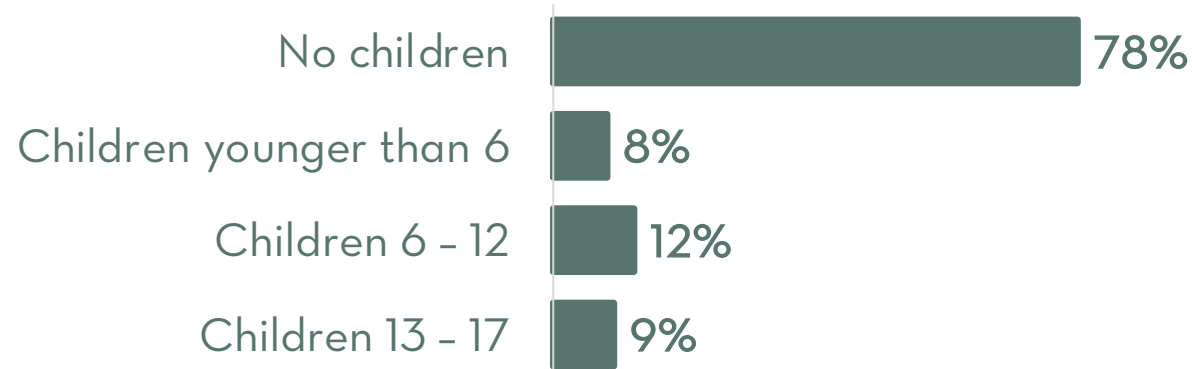
TRAVEL PARTIES

- » 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

Travel Party Composition



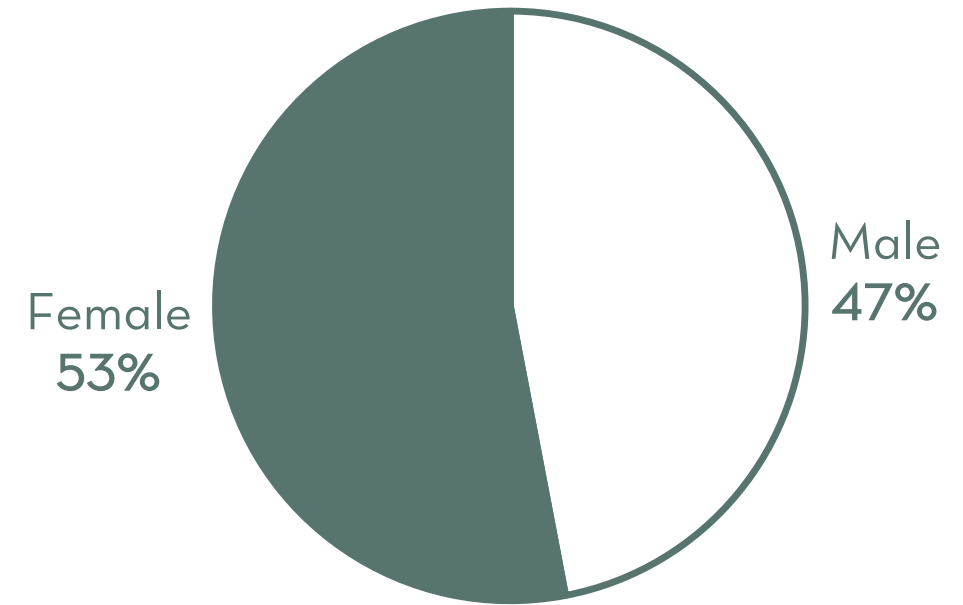
*Children in Travel Party**



*Multiple responses permitted.

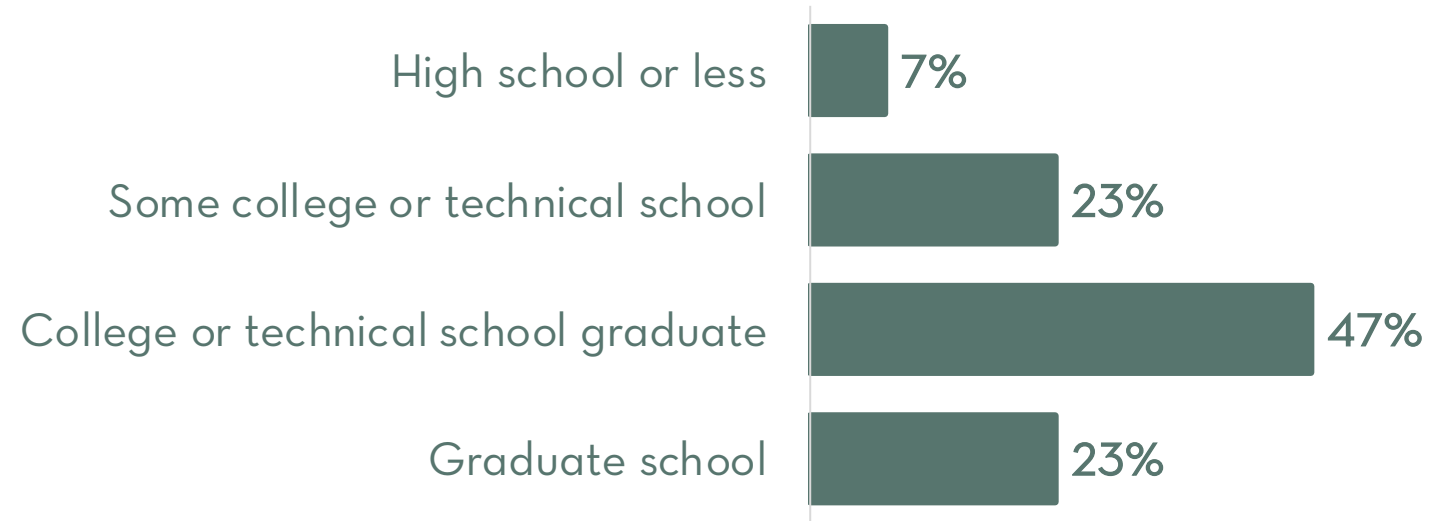
GENDER

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



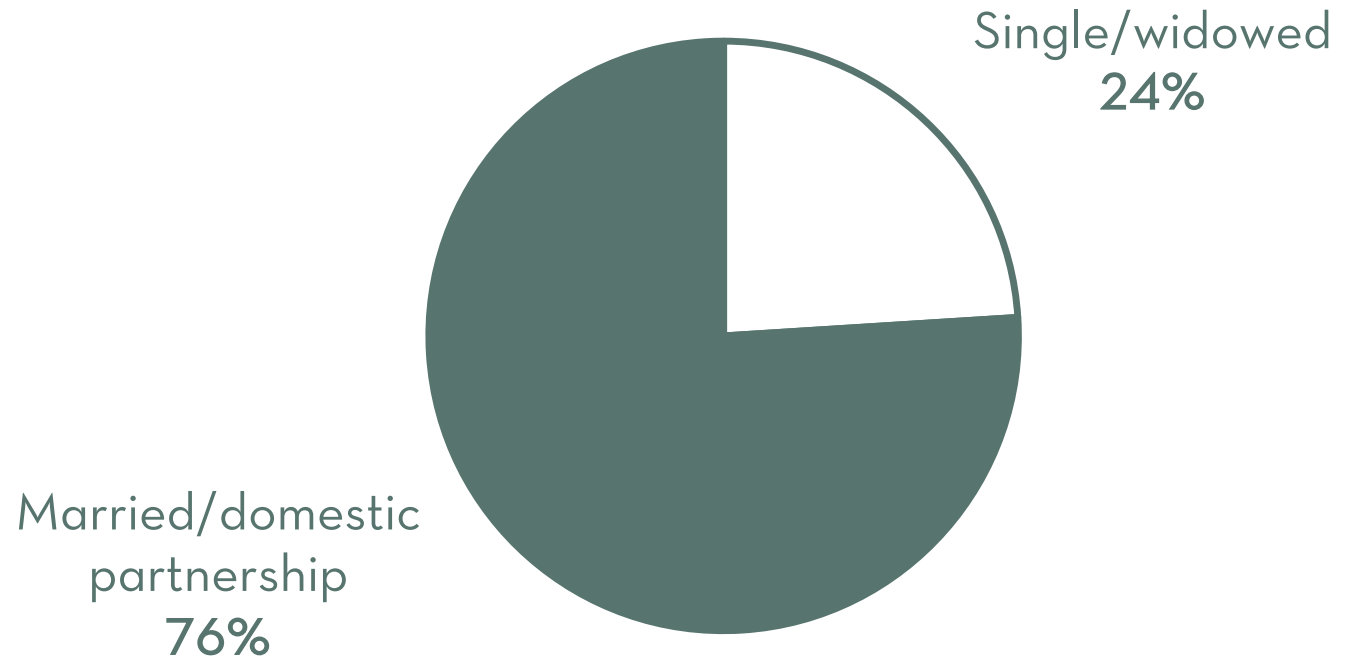
EDUCATIONAL ATTAINMENT

- » 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



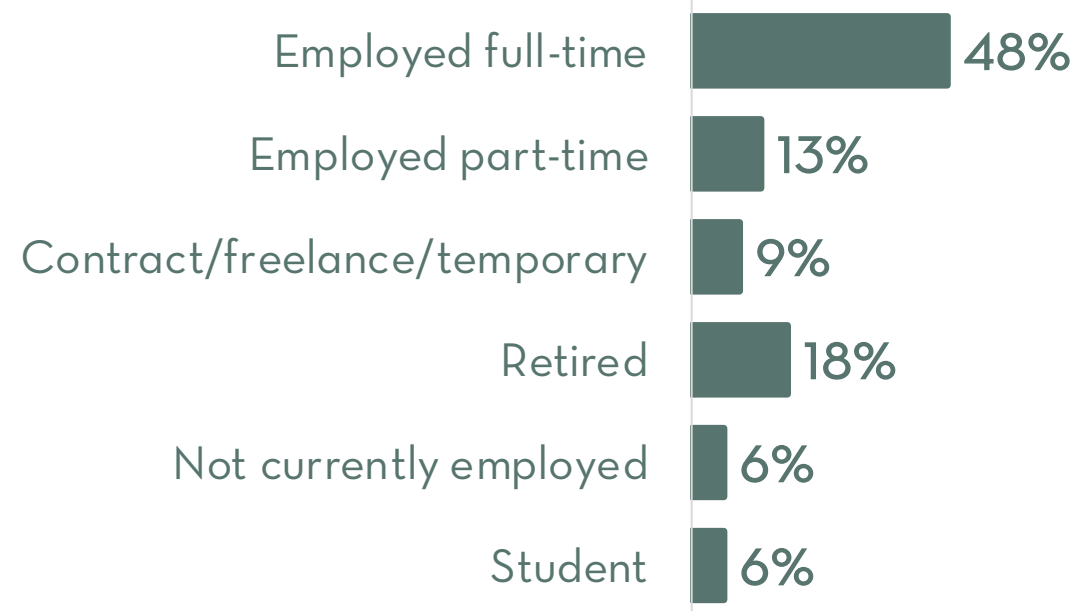
MARITAL STATUS

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



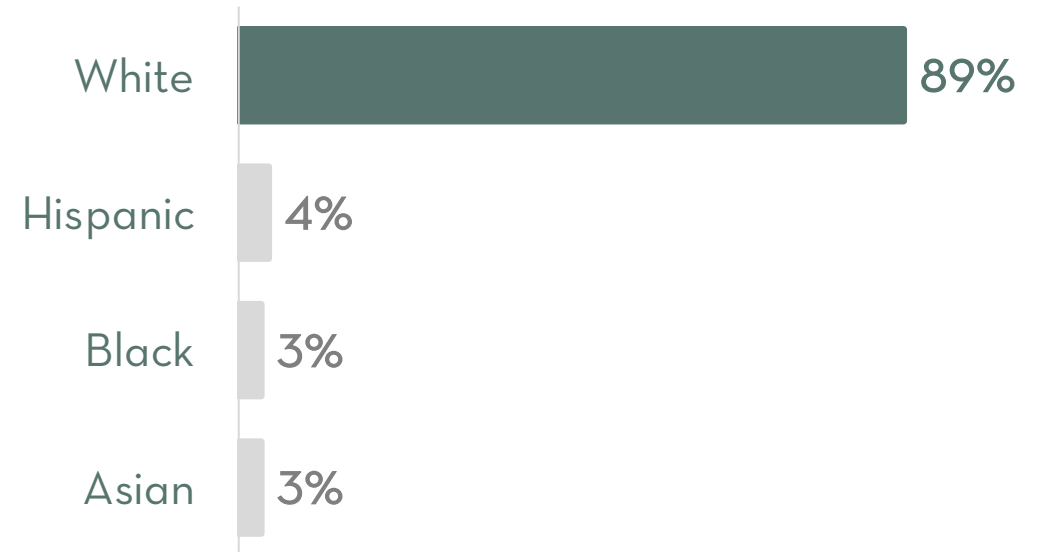
EMPLOYMENT STATUS

» 7 in 10 visitors to the Midcoast & Islands were employed, most full-time



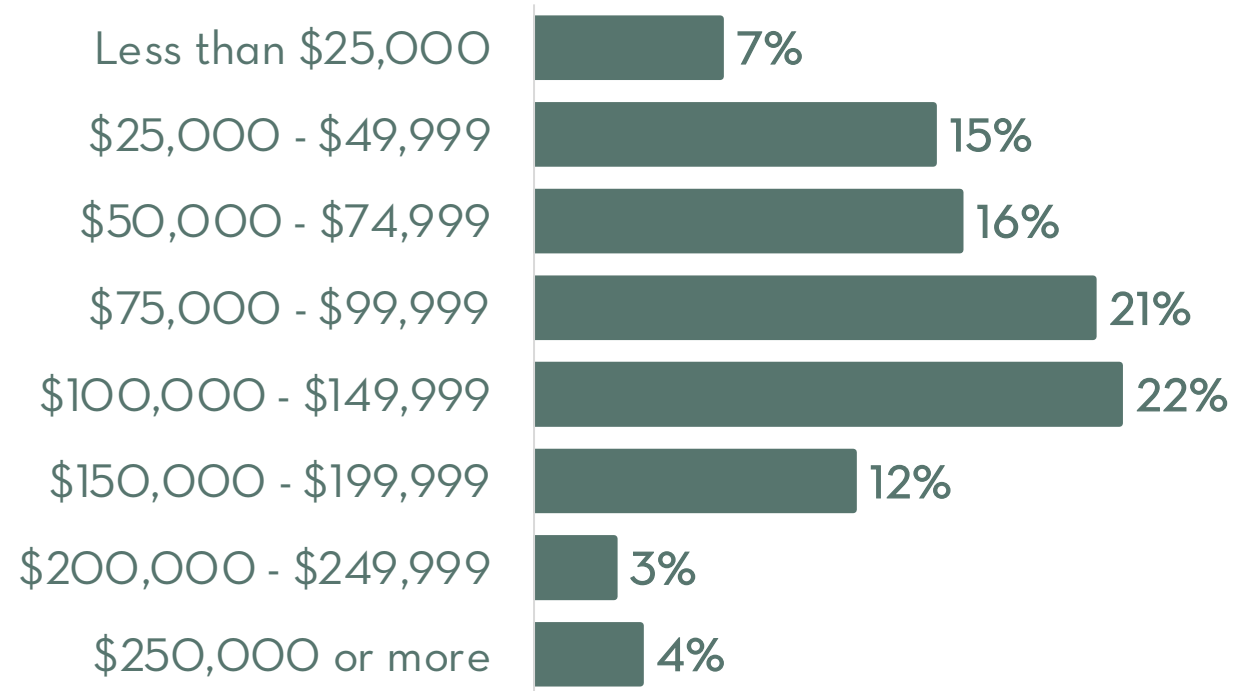
RACE & ETHNICITY

» 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

This is my first time



19%

2 - 5 times

29%

6 - 10 times

19%

11+ times

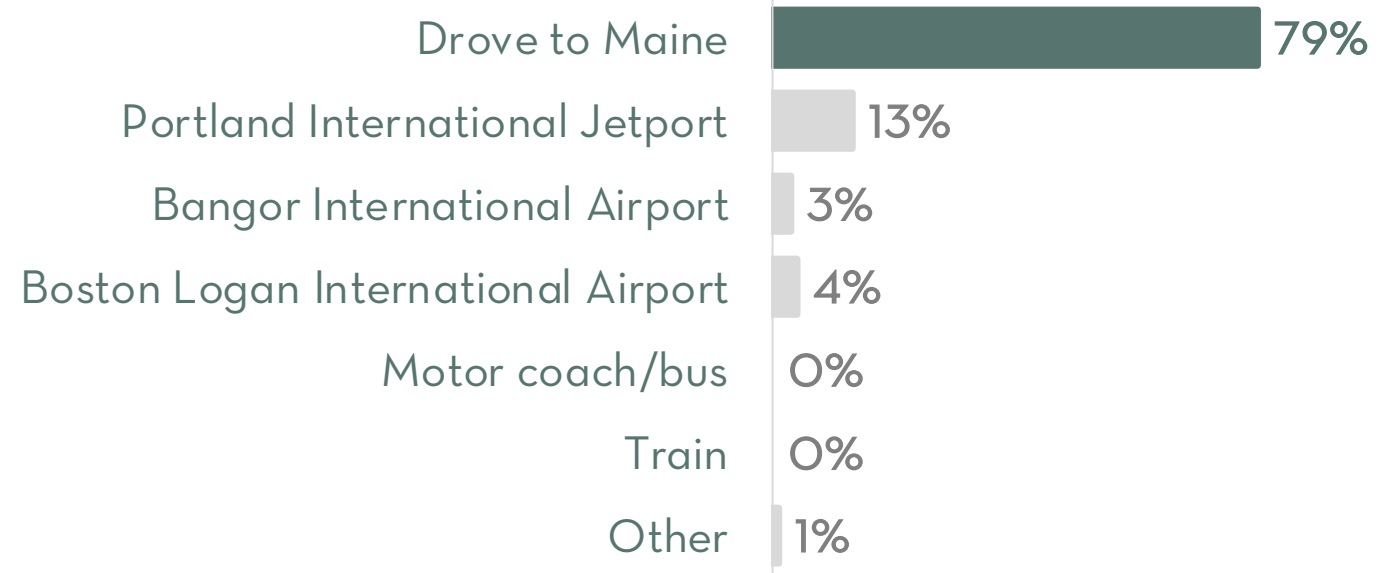
33%

TRIP PLANNING CYCLE : TRIP EXPERIENCE



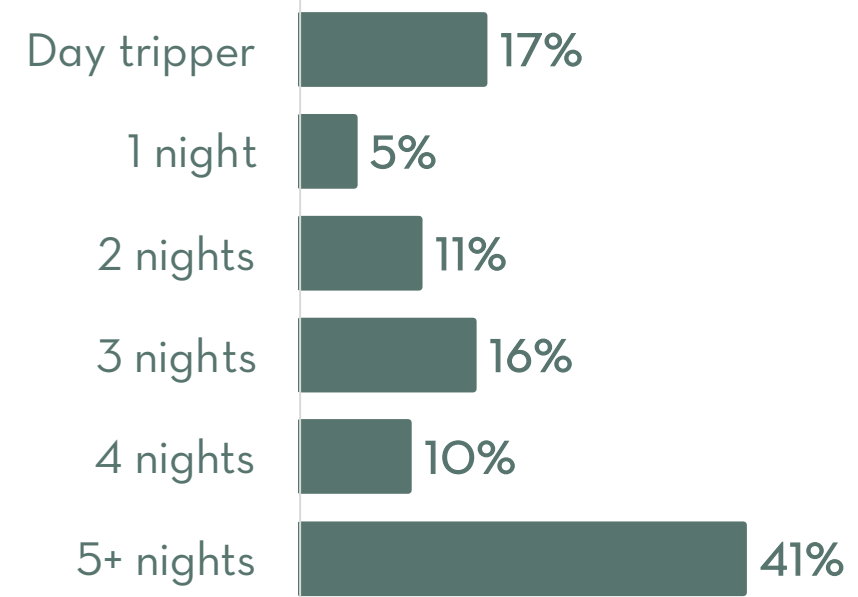
MODES OF TRANSPORTATION

- » 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



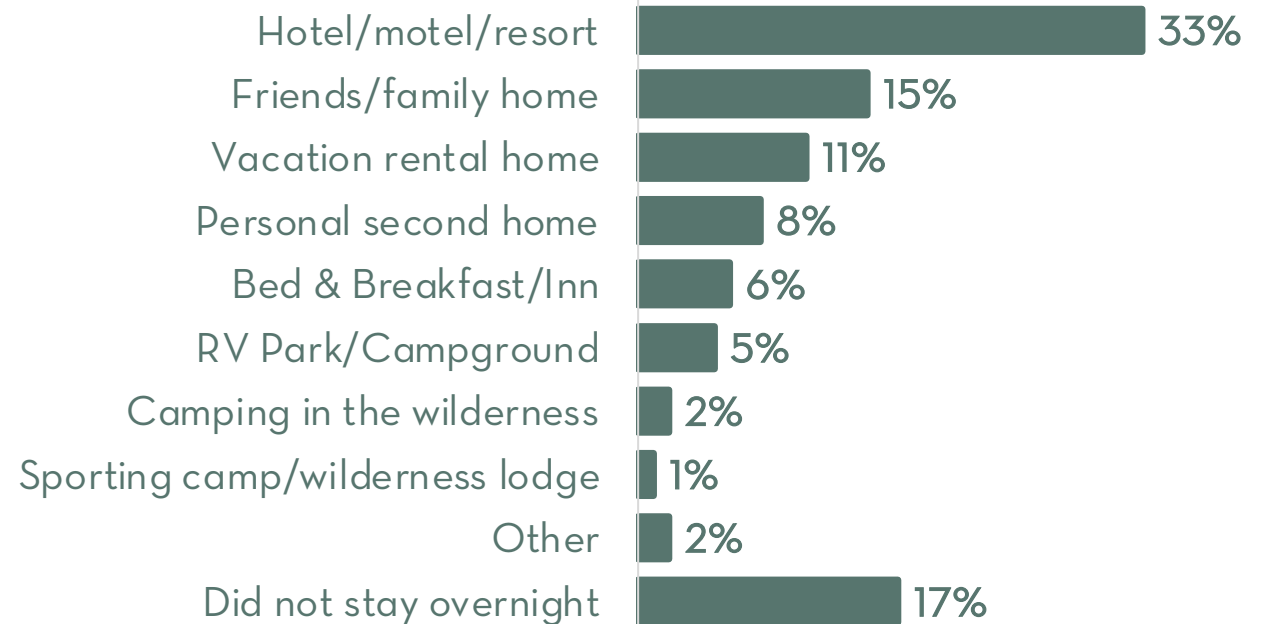
NIGHTS STAYED

- » 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



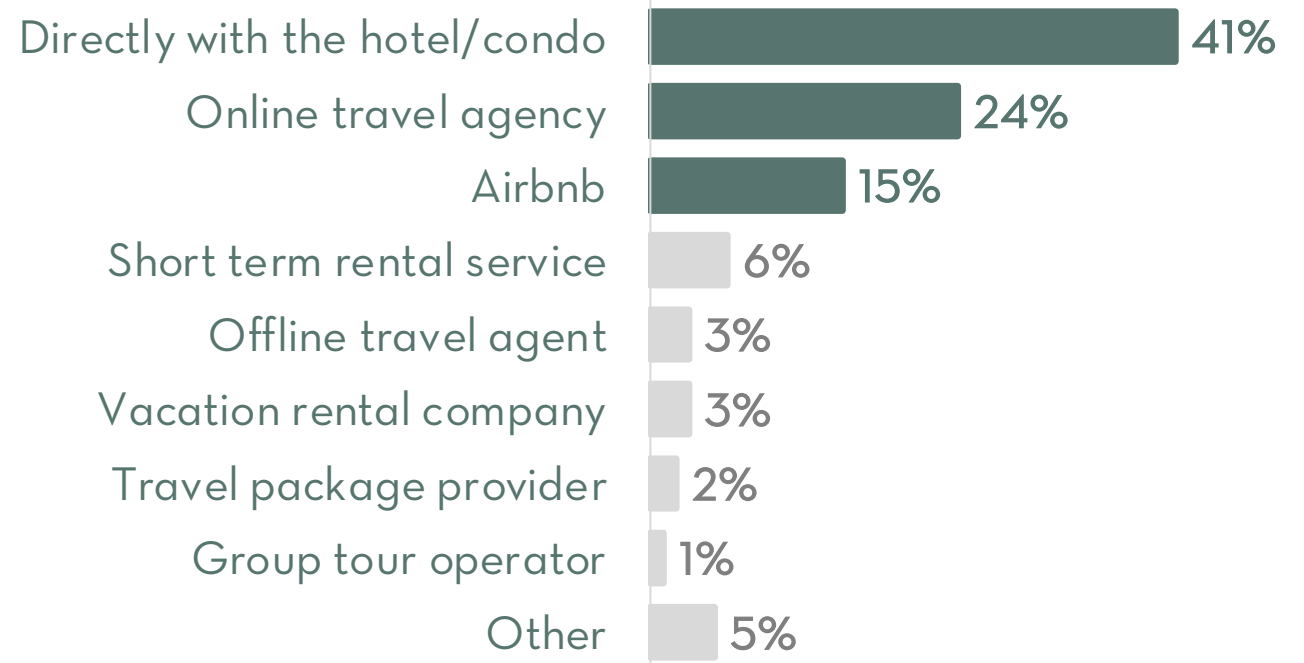
ACCOMMODATIONS

- » 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



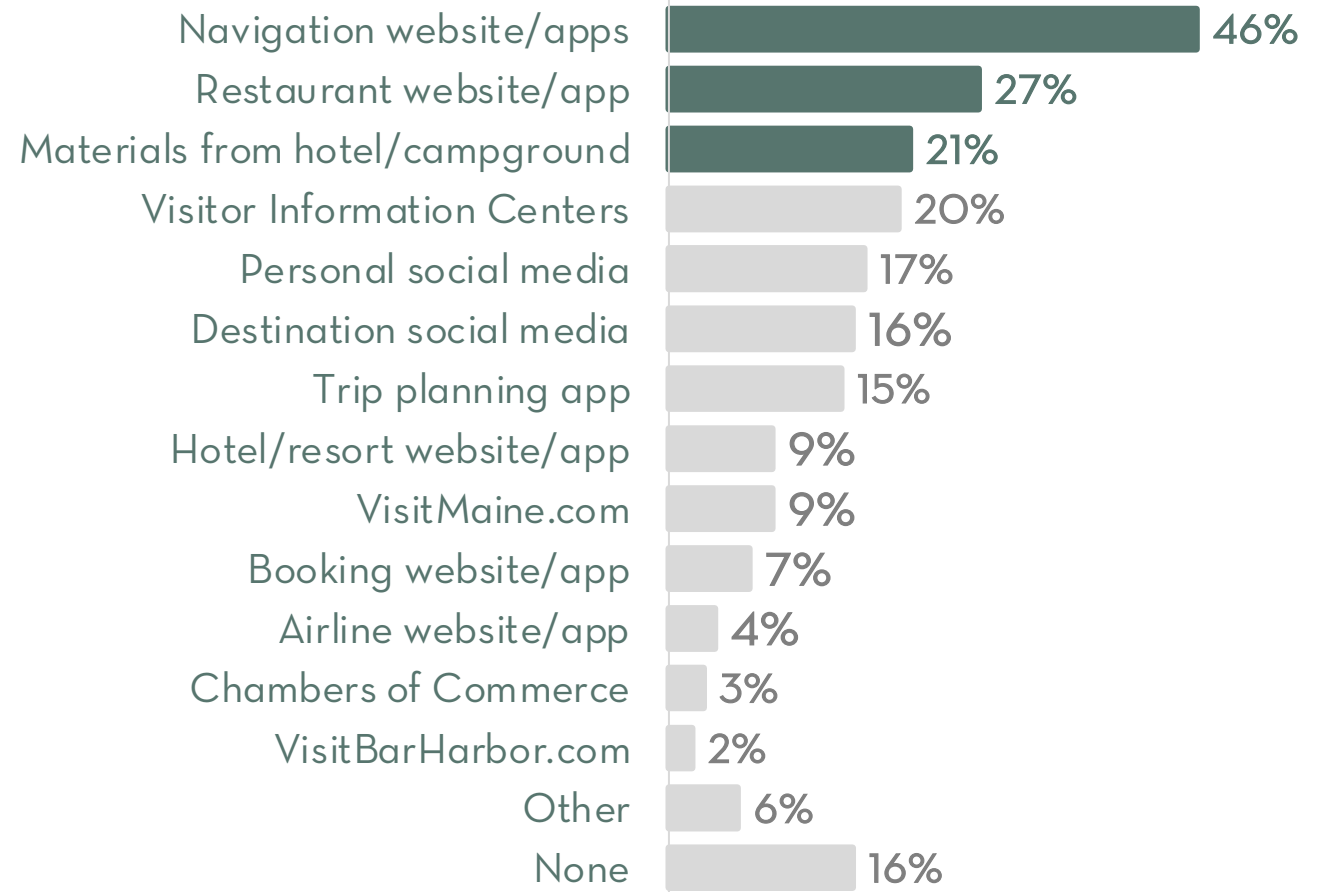
BOOKING METHODS

- » **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



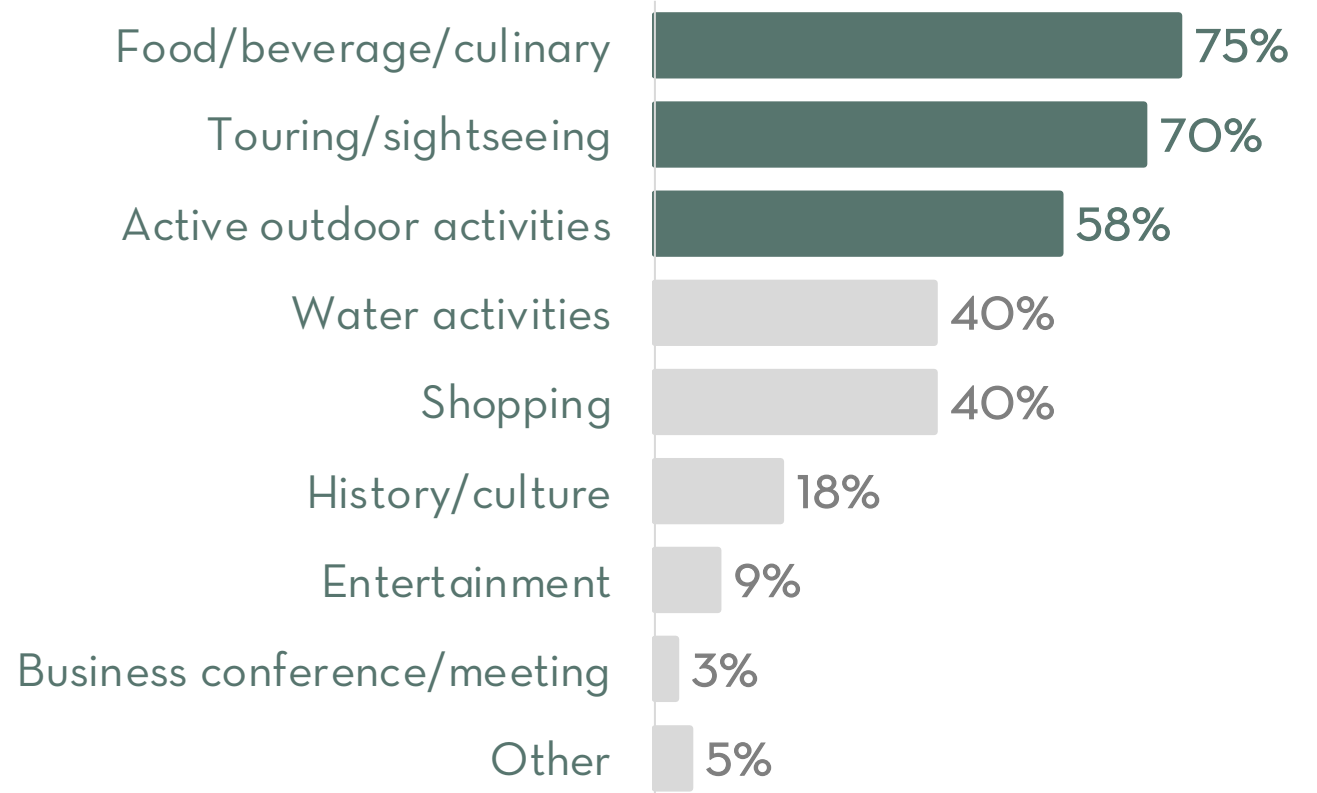
IN-MARKET VISITOR RESOURCES*

- » **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

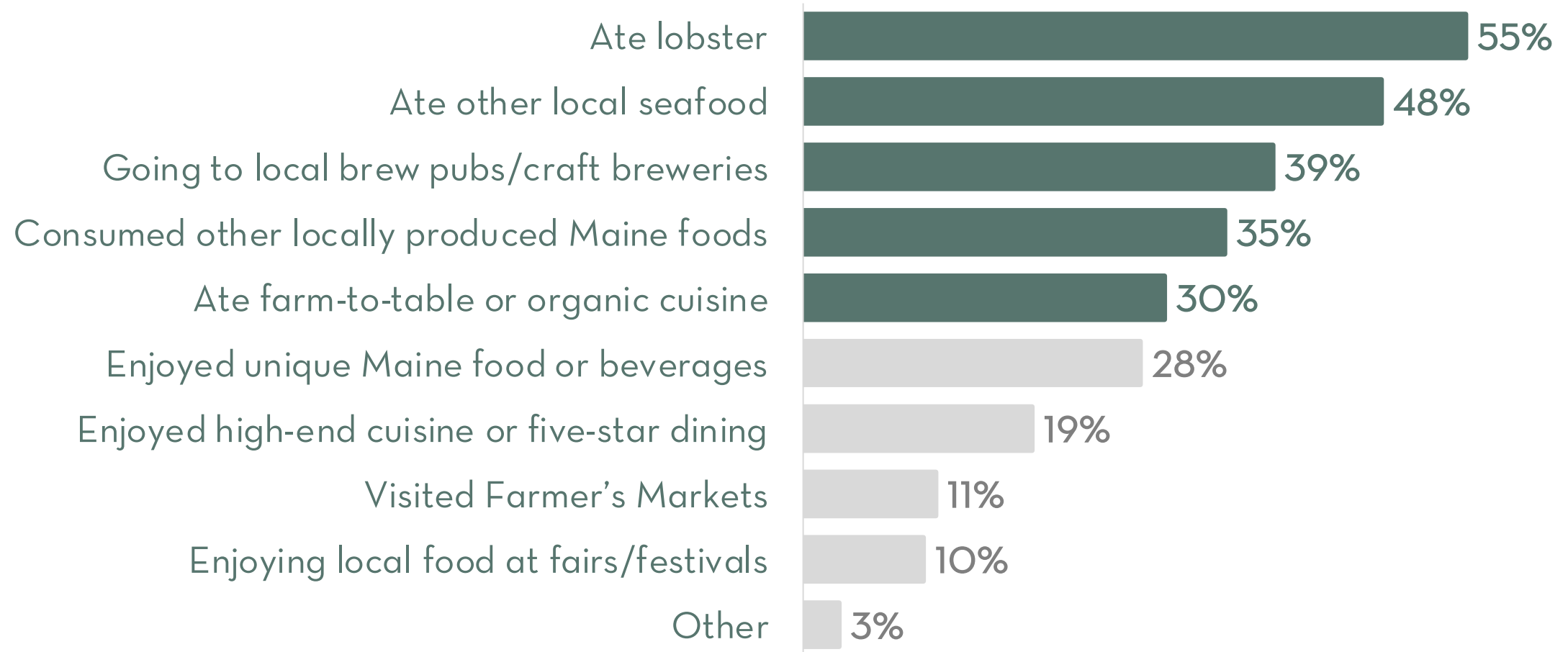


VISITOR ACTIVITIES*

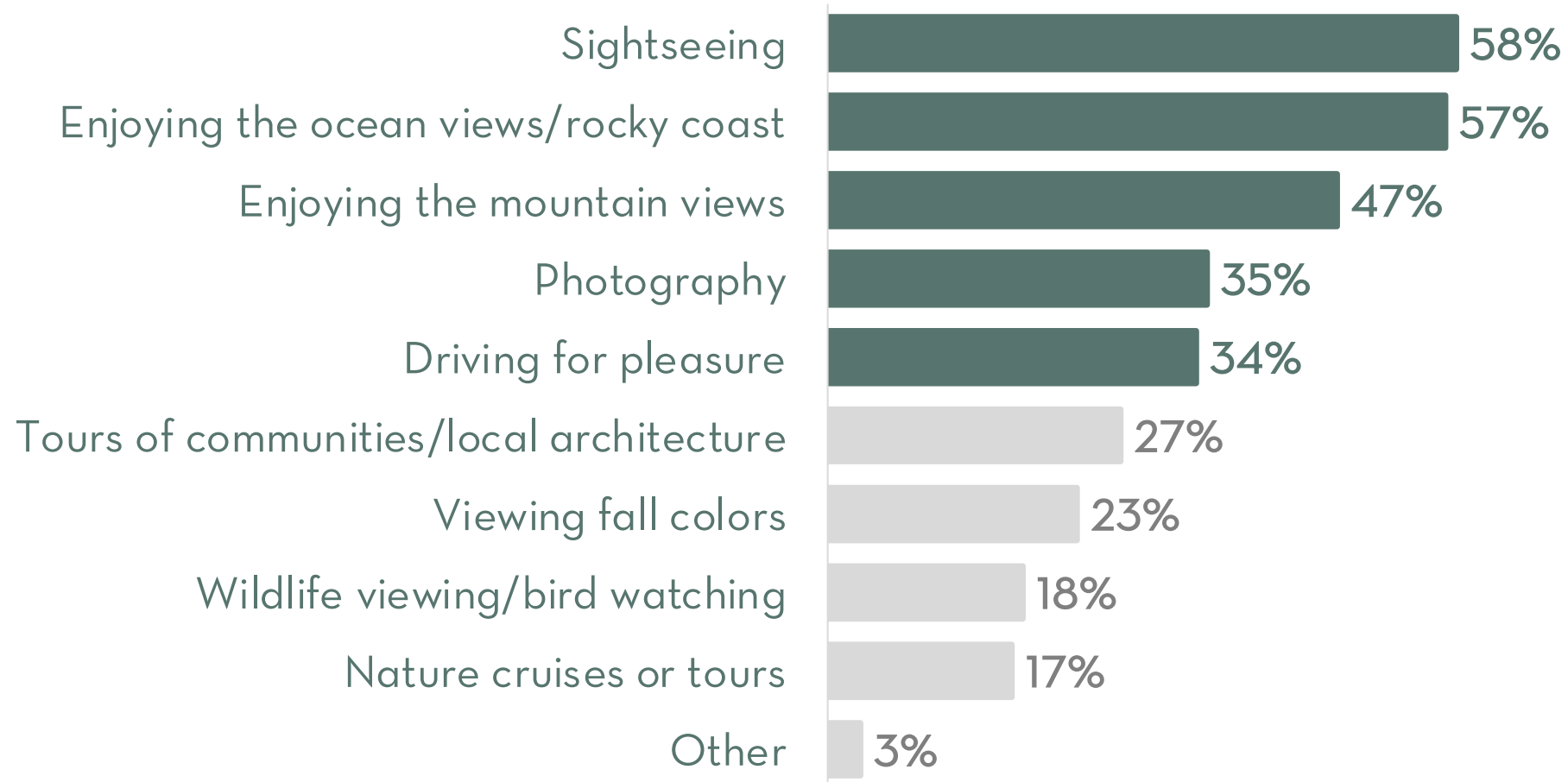
- » 3 in 4 of visitors participated in food, beverage, and culinary activities during their trip in the Midcoast & Islands
- » 7 in 10 visitors to the Midcoast & Islands engaged in sightseeing/touring activities during their trip



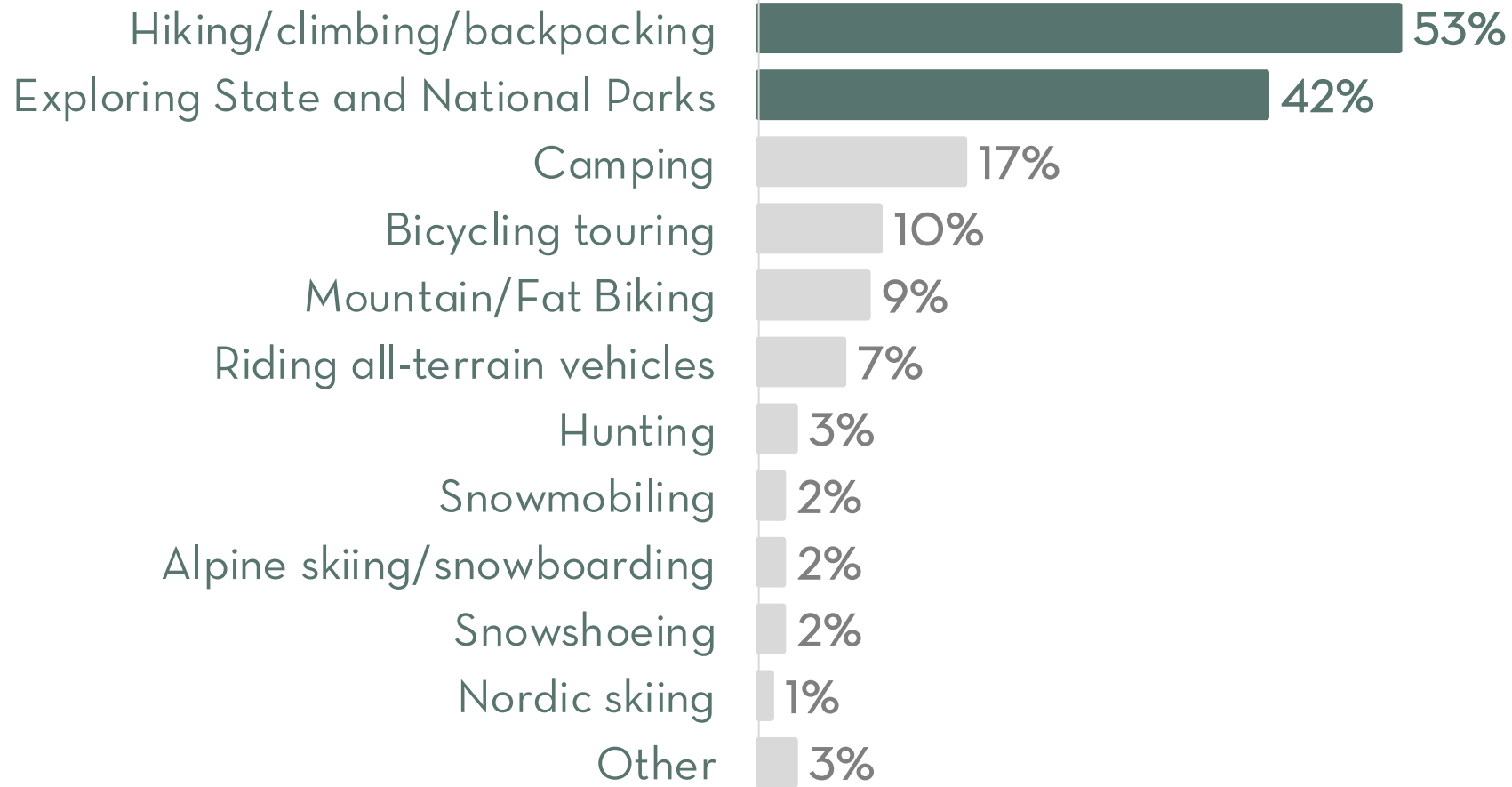
FOOD & BEVERAGE ACTIVITIES*



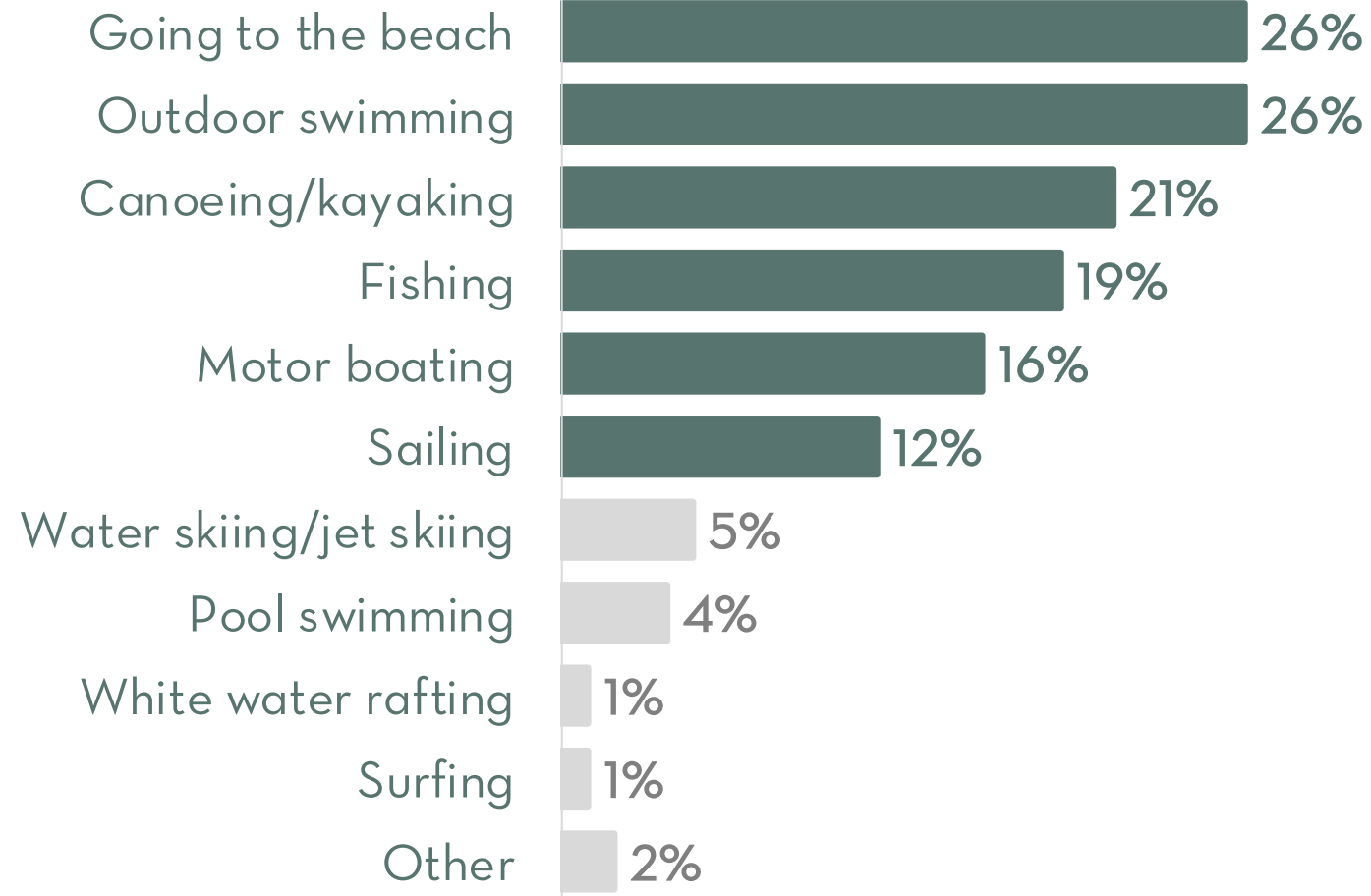
TOURING & SIGHTSEEING ACTIVITIES*



ACTIVE OUTDOOR ACTIVITIES*



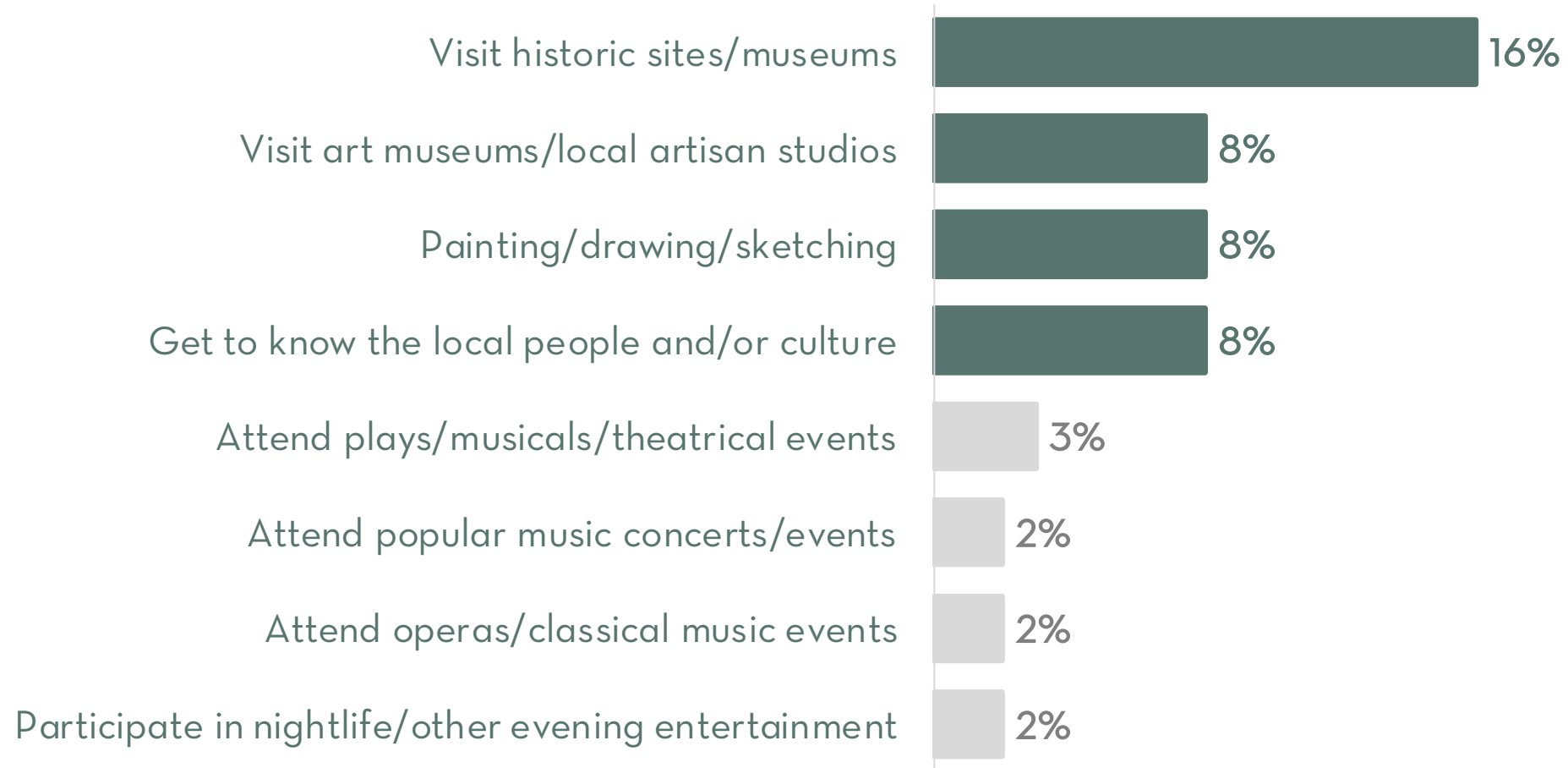
WATER ACTIVITIES*



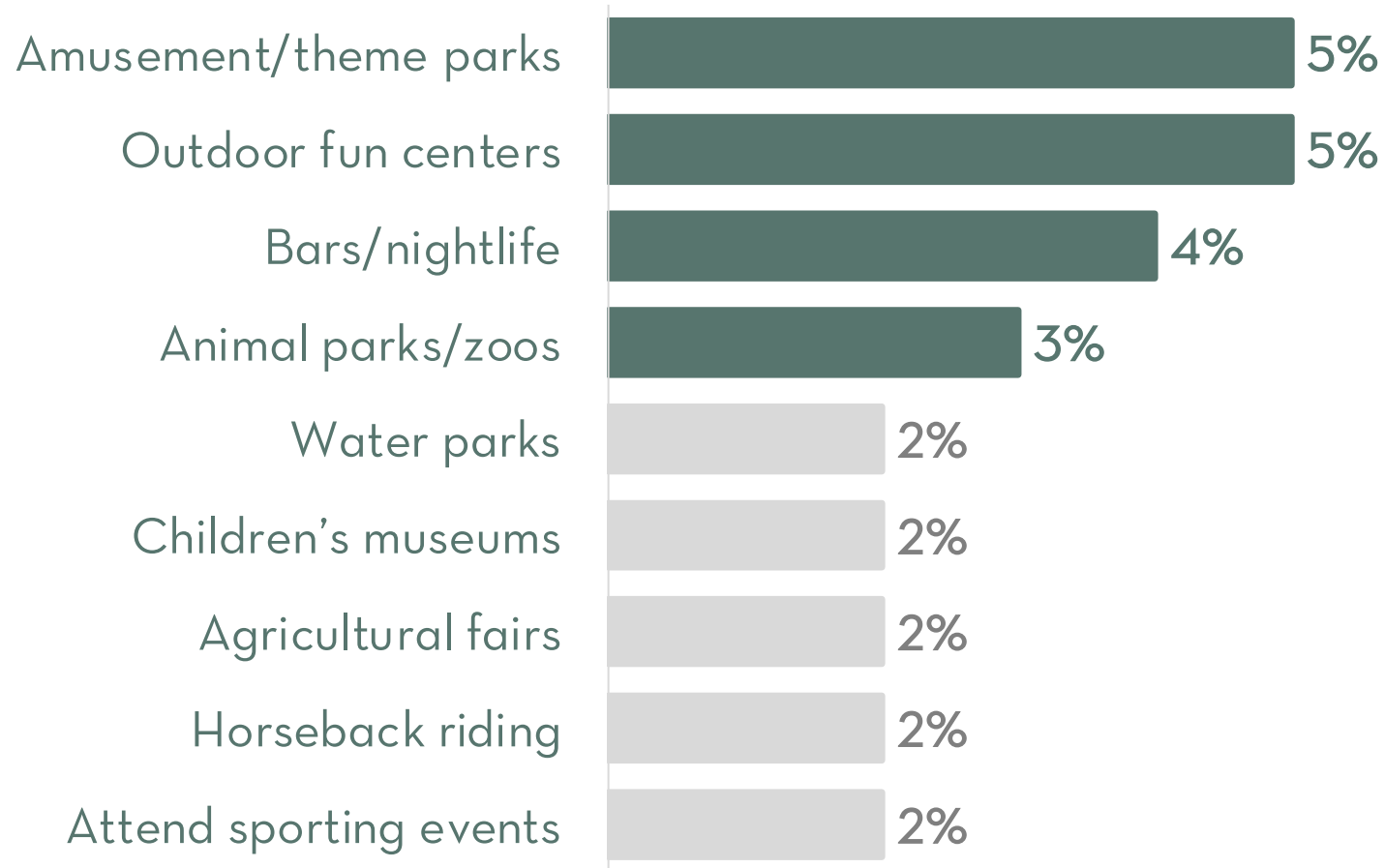
SHOPPING ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*

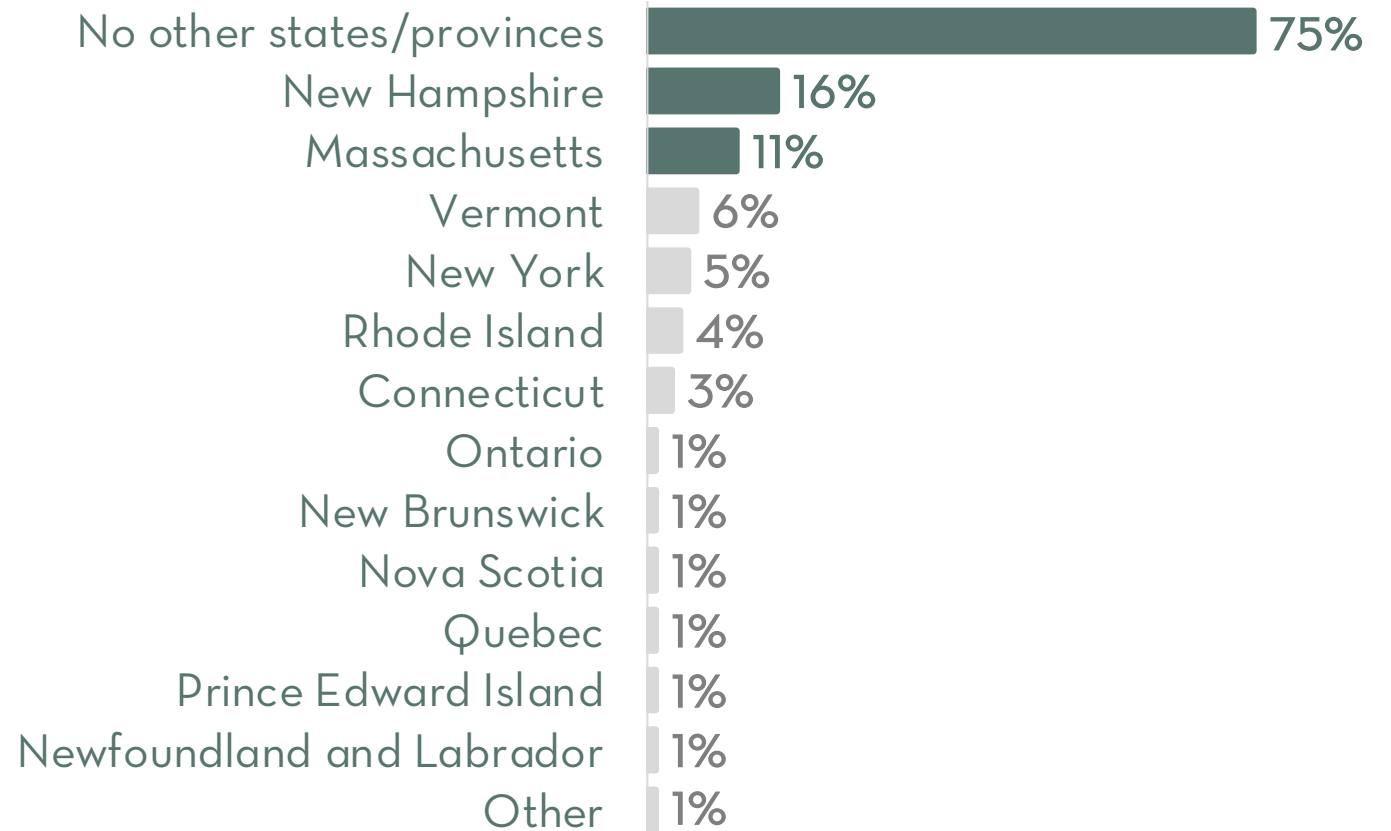


ENTERTAINMENT ACTIVITIES*



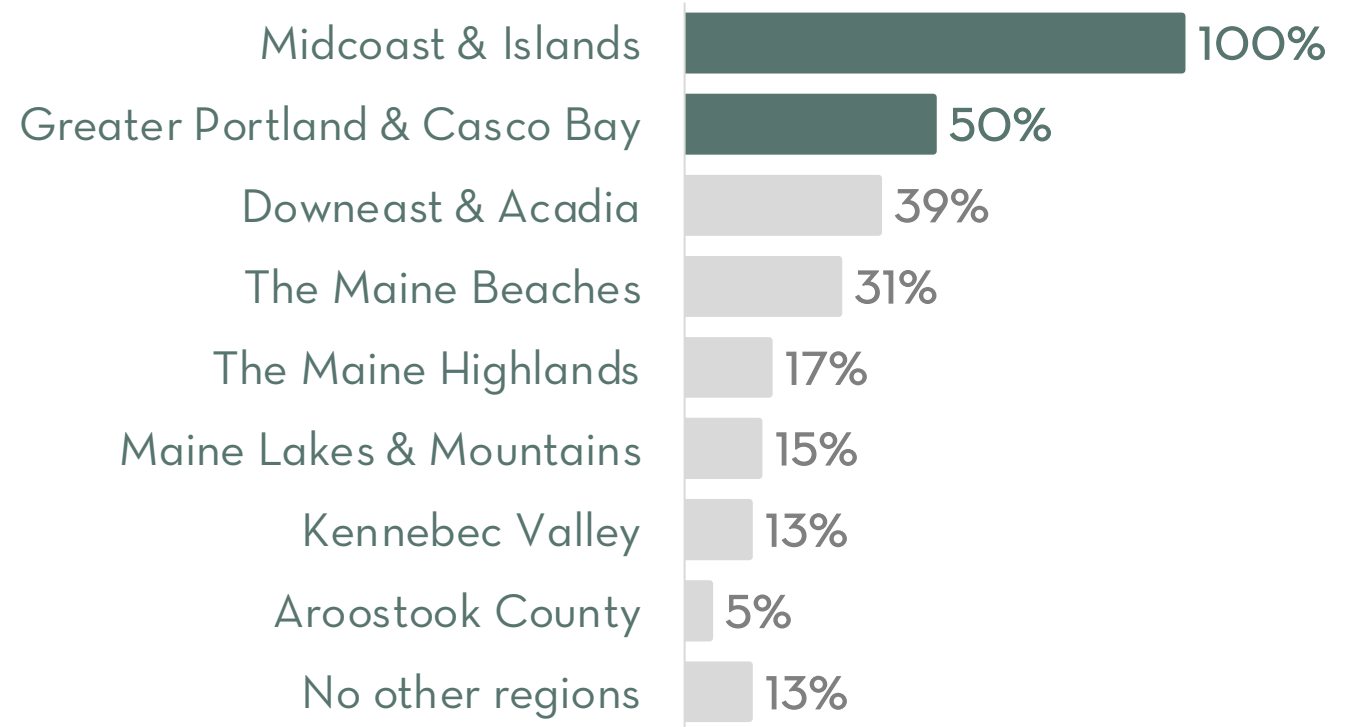
OTHER STATES & PROVINCES VISITED*

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



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



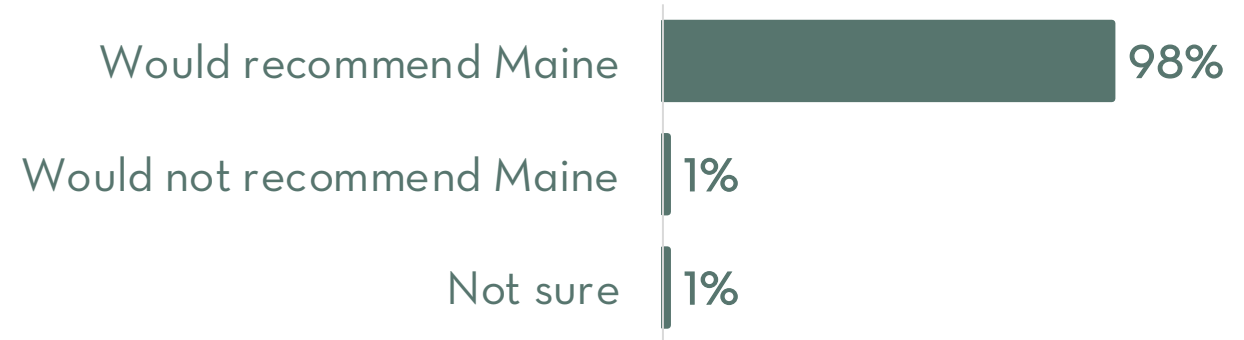
TRIP PLANNING CYCLE : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

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

Likelihood of Recommending Maine

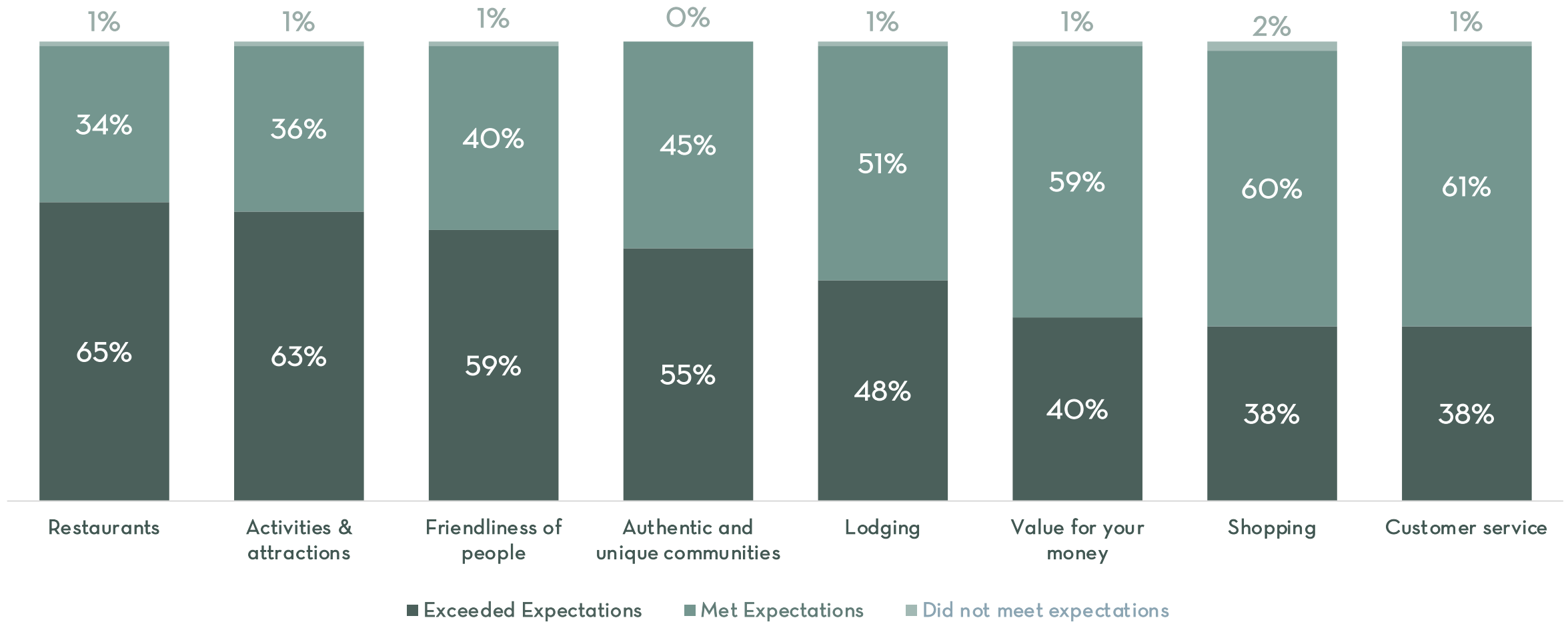


- » **99%** of visitors would recommend that their friends and family visit the Midcoast & Islands

Likelihood of Recommending the Midcoast & Islands



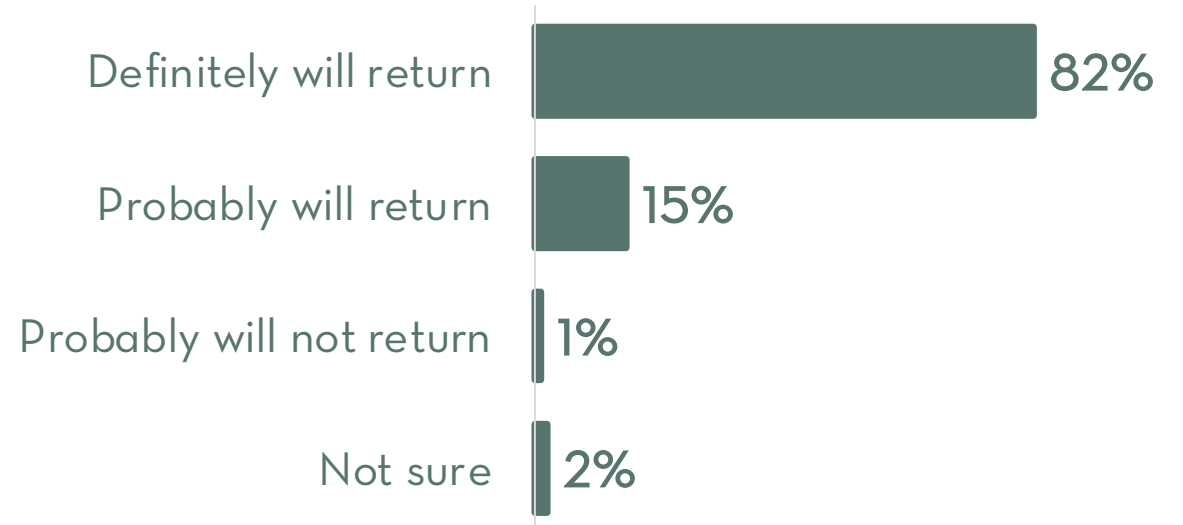
TRIP EXPECTATIONS



"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

Downs & St. Germain Research
Joseph St. Germain, Ph.D., President
Phillip Downs, Ph.D., Senior Partner
Rachael Anglin, Director of Research
Erin Dinkel, Senior Project Director
Glencora Haskins, Project Director
Isiah Lewis, Project Director
850 - 906 - 3111 | dsg-research.com

