

Maine Office of Tourism

Visitor Tracking Research

2018 Calendar Year Annual Report



Regional Insights: **Downeast & Acadia**



Prepared by



A Division of DRI

May 2019



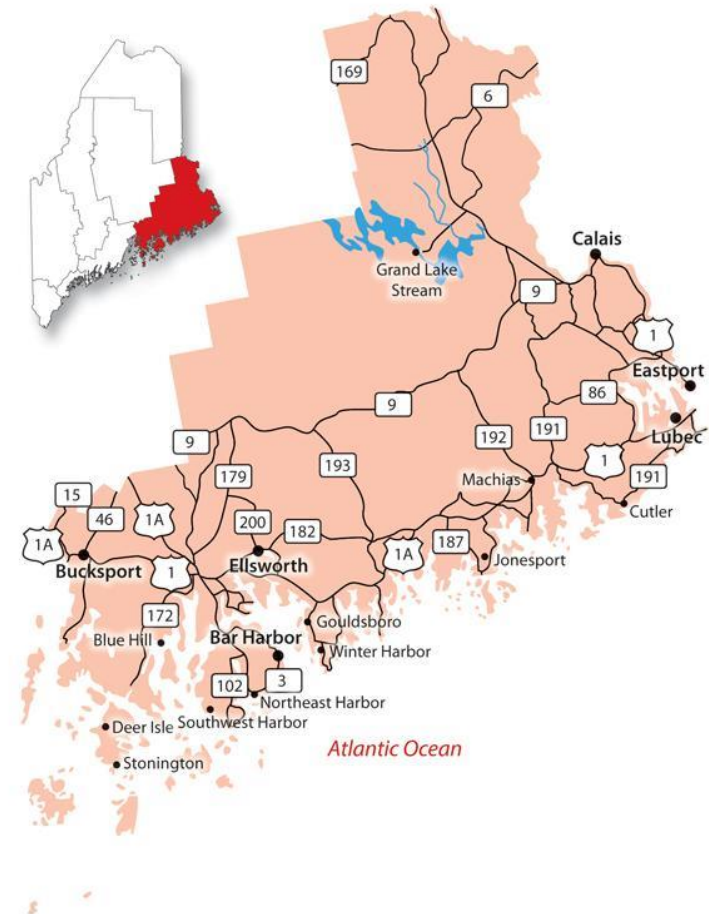
Regional Insights: Downeast & Acadia

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Introduction

- The following report provides a profile of visitors and their trips to the **Downeast & Acadia** tourism region during 2018, from a survey of:
 - 532 overnight visitors, and
 - 250 day visitors.
- Throughout this report, data for the **Downeast & Acadia** tourism region will be presented alongside data for the state of Maine as a whole. Statistically significant differences between the tourism region and the state were calculated at the 95% confidence level and are noted throughout by < > around the larger figure.
(A statistically significant difference is more than would be expected by chance 95 out of 100 times.)
- Statistically significant differences between 2017 and 2018 are also highlighted for both the **Downeast & Acadia region** and the state of Maine. A statistically significant **increase** from the previous year is indicated by **green** text, and a significant **decrease** from the previous year is indicated by **red** text.



Visitors to Downeast & Acadia: How They Are Unique



Comparisons: Region vs. State

- Visitors to the Downeast & Acadia region and visitors to the state of Maine as a whole in 2018 differed in a number of ways, many of which are related to the sightseeing and outdoor activities available in the Downeast & Acadia region. These variations include:
 - ✓ Their demographics (including their areas of origin),
 - ✓ Their areas of interest, and
 - ✓ The activities they participated in while visiting.
- The most meaningful of these traveler and trip differences are highlighted on the following pages.

Visitor Origin

Visitors to the Downeast and Acadia region, compared to visitors statewide were...



Overnight Visitors

Less likely to be from New England (especially Massachusetts) but more likely to be from the Mid-Atlantic states.

More likely to be first-time visitors.



Day Visitors

More likely to be from Maine and New Brunswick, but less likely to be from Massachusetts or New Hampshire.

Visitor Demographics

Visitors to the Downeast and Acadia region, compared to visitors statewide were...

Overnight Visitors



More likely to have a college degree or higher education.

Day Visitors



Less likely to have a college degree.

Less affluent, with lower household incomes.

Trip Interest Areas

Visitors to the Downeast and Acadia region, compared to visitors statewide were...

Overnight and Day Visitors

More likely to be interested in pursuing:

- Active outdoor activities,
- Touring/sightseeing, and
- History/culture.

Overnight Visitors

Less likely to be interested in shopping.

Travel Drivers

Visitors to the Downeast and Acadia region, compared to visitors statewide were...

Overnight Visitors



More likely to be drawn to active outdoor (non-aquatic) activities and sightseeing/touring.

Less likely to be driven by shopping and water activities.

Day Visitors



More likely to be drawn to active outdoor activities.

Less likely to be drawn to water activities and culinary activities.

Trip Activities

Visitors to the Downeast and Acadia region, compared to visitors statewide were...

Overnight Visitors

More likely to have experienced:

- Mountain views,
- Wildlife watching/birding,
- Nature cruises/tours,
- Local brew pubs/craft breweries,
- Sailing,
- Hiking/backpacking, and
- National and state parks.

Less likely to have gone:

- Outlet shopping, and
- Pool swimming.

Trip Activities

Visitors to the Downeast and Acadia region, compared to visitors statewide were...



Day Visitors

More likely to have experienced:

- Ocean views/rocky coast,
- Mountain views,
- Wildlife watching/birding,
- Local foods at fairs/festivals,
- Fishing,
- Canoeing/kayaking,
- Hiking/backpacking,
- State and national parks, and
- Shopping for “Made in Maine” products.

Less likely to have experienced:

- Farm-to-table cuisine, and
- Popular music concerts/events.

Visitation and Economic Impact Summary



Visitation and Economic Impact Summary: Downtown & Acadia

2018 Regional Tourism Impact Estimates

Downtown & Acadia



An estimated **7.12 million travelers** visited the Downtown & Acadia region in 2018 ~ a **16.5% increase** over 2017.

2017 Total
6.11 million

(14.1% of All Maine Visitors)

2018 Total
7.12 million

(15.7% of All Maine Visitors)

Number of Visitors to the Downtown & Acadia Region

* Percent of estimated total
Maine day visitors

2.93 million
(12.7%)*

3.45 million
(13.9%)*

** Percent of estimated total
Maine overnight visitors

3.18 million
(15.7%)**

3.67 million
(17.9%)**

2017

2018

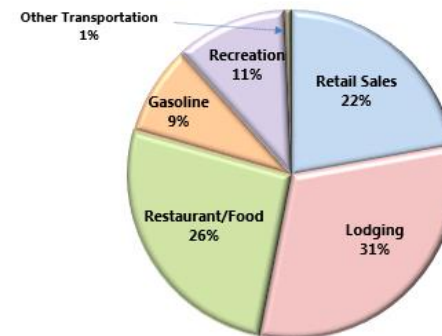


The visitation estimates shown above include all visitors on tourism-related trips. Tourism related trips include: all leisure trips, trips that are a general visit to see friends or relatives, a wedding, a holiday visit, and business trips that are for a convention/conference/trade show or training/professional development.

2018 Regional Tourism Impact Estimates

Downtown & Acadia

In 2018, Downtown & Acadia visitors spent **\$1.14 billion** ~ up **16.8%** from 2017.



The \$1.14 billion spent by visitors to Downtown & Acadia supported a total of...

Economic impact begins when a visitor spends money in a region. But the benefits to a local economy go well beyond the impact of this initial spending. These "direct economic impact" dollars continue to circulate through the economy, as (for example) innkeepers pay wages, restaurateurs purchase raw ingredients, and so on. These additional rounds of spending are called "indirect economic impact." Total economic impact is the sum of the travelers' initial (direct) spending and the subsequent (indirect) spending by residents of the area. The jobs created, income earned, and tax dollars received are based on the total economic impact.

19,485 jobs

\$365.6 million
in total
earnings

\$107.4 million
in total taxes



These economic impact estimates are based on all overnight visitors and out-of-state day visitors on tourism-related trips (as defined on the opposite page). Economic impact is estimated using DPA's visitor expenditure estimates and the RIMS II economic impact model.

OVERNIGHT VISITORS





Profile of Overnight Visitors

Overnight Visitor Demographics

- In 2018, the typical traveler to the Downeast & Acadia region was 38 years old and had a household income of about \$90,000 – roughly reflective of visitors to the state overall.
- Compared to the state as a whole, the region's overnight visitors were more likely to have a college degree or more education.

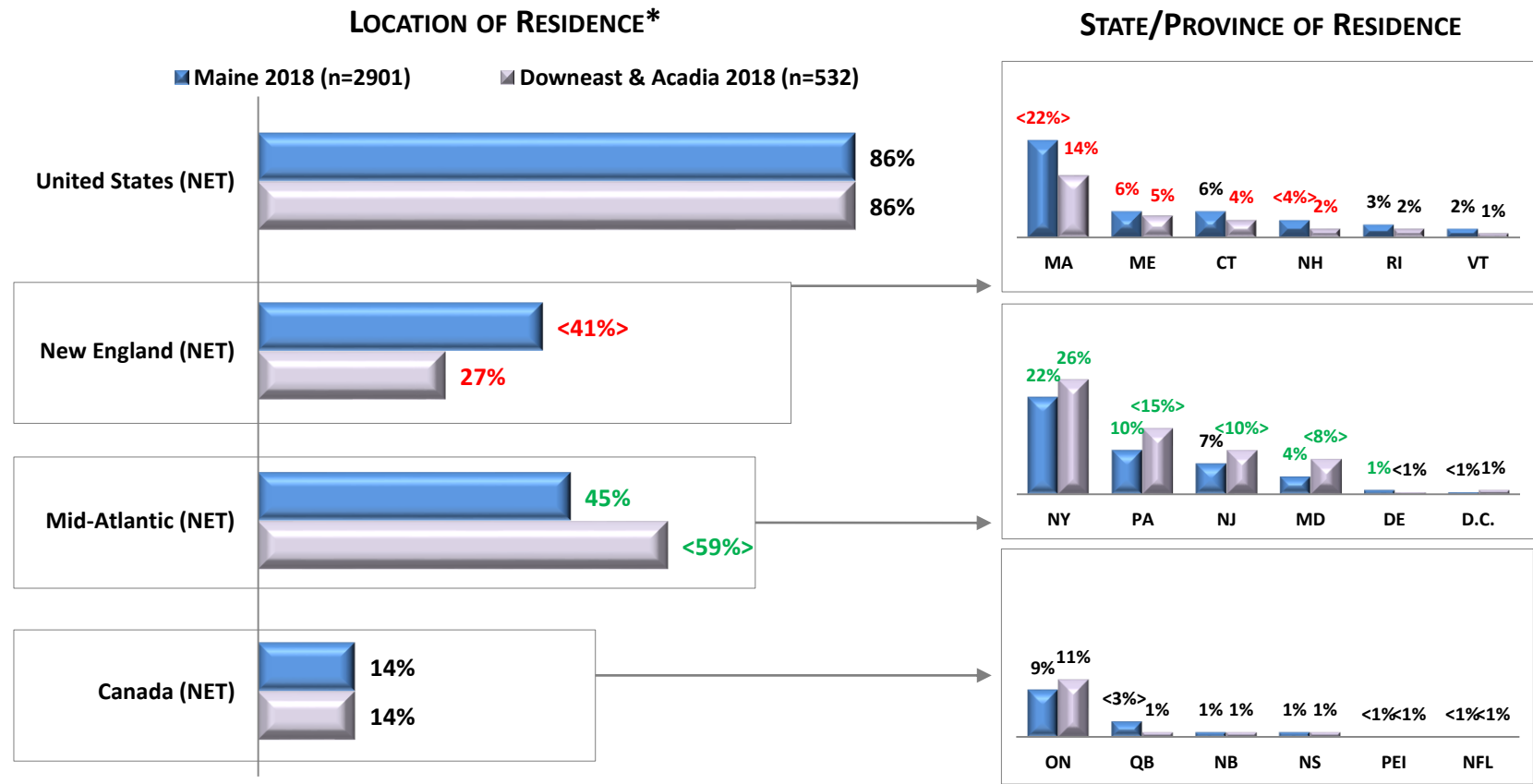
	Maine 2018 (n=2901)	Downeast & Acadia 2018 (n=532)
Age:		
< 35	46%	50%
35 - 44	23%	23%
45 - 54	14%	12%
55 +	17%	15%
Mean	39.0	38.2
Income:		
< \$50,000	<27%>	21%
\$50,000 - \$99,999	43%	<49%>
\$100,000 +	30%	30%
Mean	\$86,400	\$89,300
Female	66%	63%
College degree or higher	65%	<72%>
Married	47%	49%
Employed full-time	62%	67%

<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Six out of ten visitors to the Downeast & Acadia region in 2018 were from the Mid-Atlantic. Most of the rest – about three out of ten – were from New England.

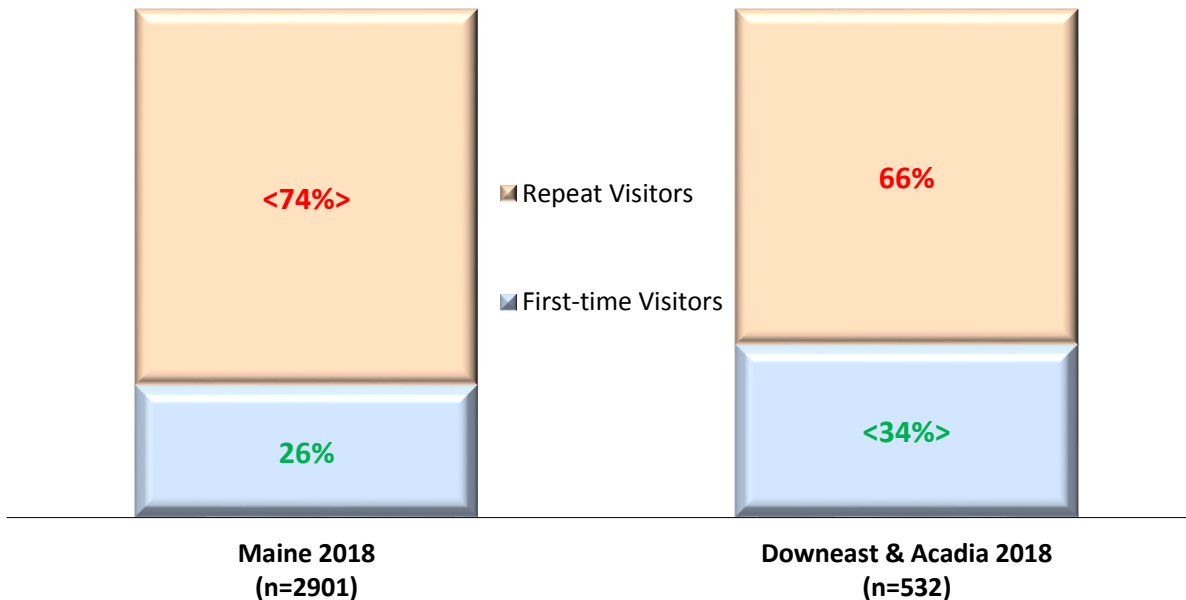
- The proportion of overnight visitors from New England dipped between 2017 and 2018, with a corresponding increase coming from Mid-Atlantic states.
- Regional visitors were more likely than visitors to the state as a whole to be from the Mid-Atlantic.



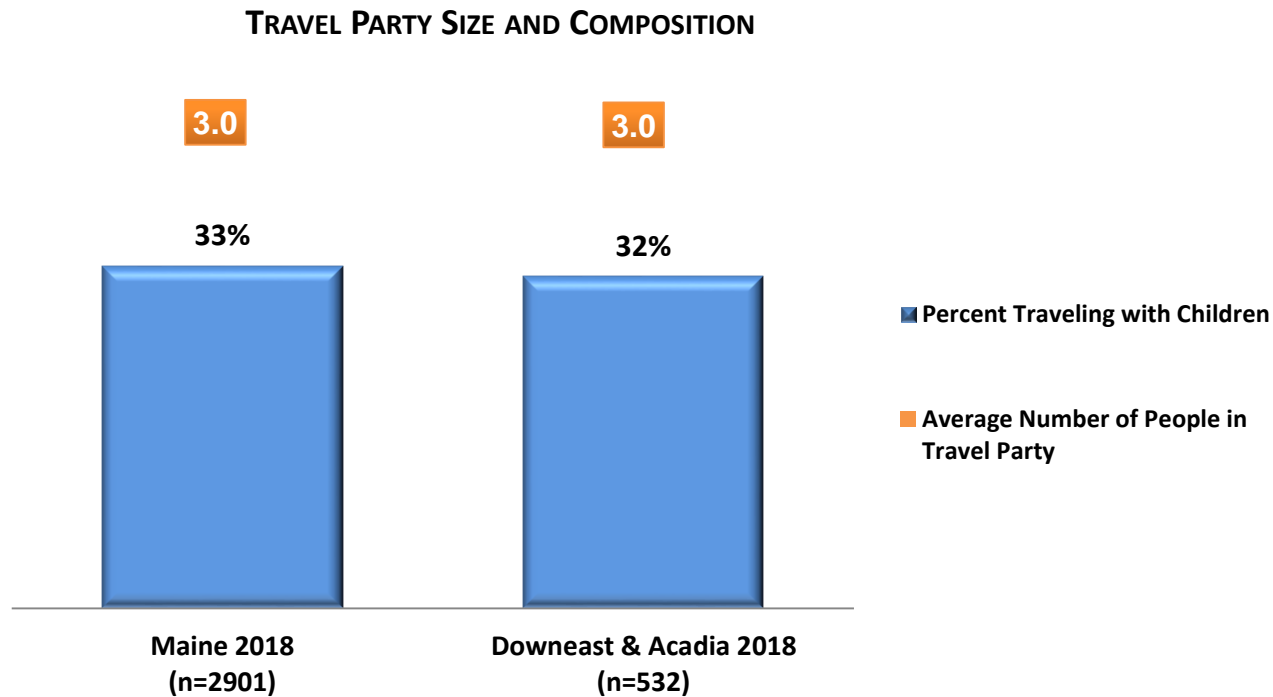
Roughly one-third of overnight visitors to this region in 2018 were visiting Maine for the first time.

- The region attracted more first-time visitors in 2018 than in 2017 (when 24% of visitors were new).
- The region was also more likely than the state overall to attract new visitors in 2018.

REPEAT VS. FIRST-TIME VISITORS



The average party visiting the Downeast & Acadia region had three people; one out of three were traveling with children.

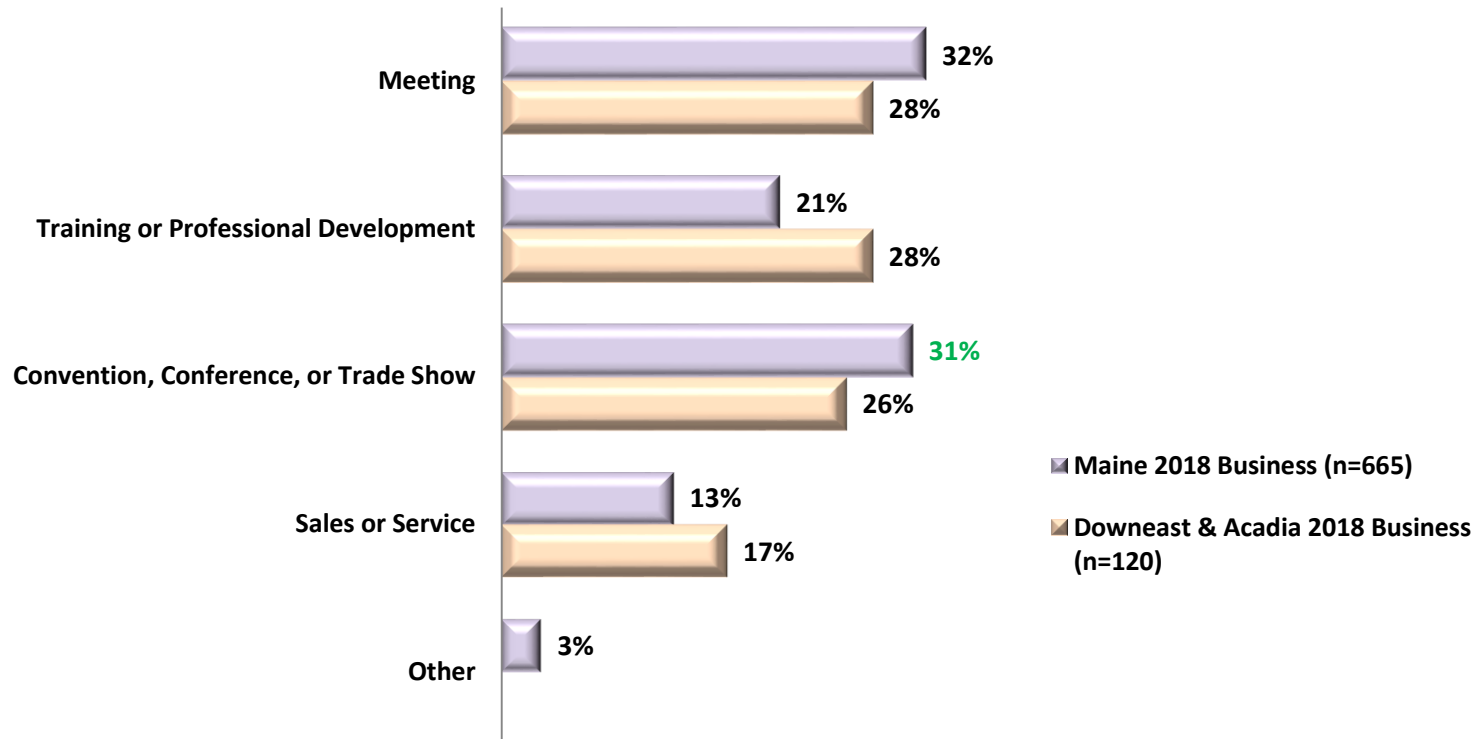




Overnight Visitors: Trip Experience

Overnight business trips to the Downeast & Acadia region were equally likely to be driven by meetings, training, and conventions.

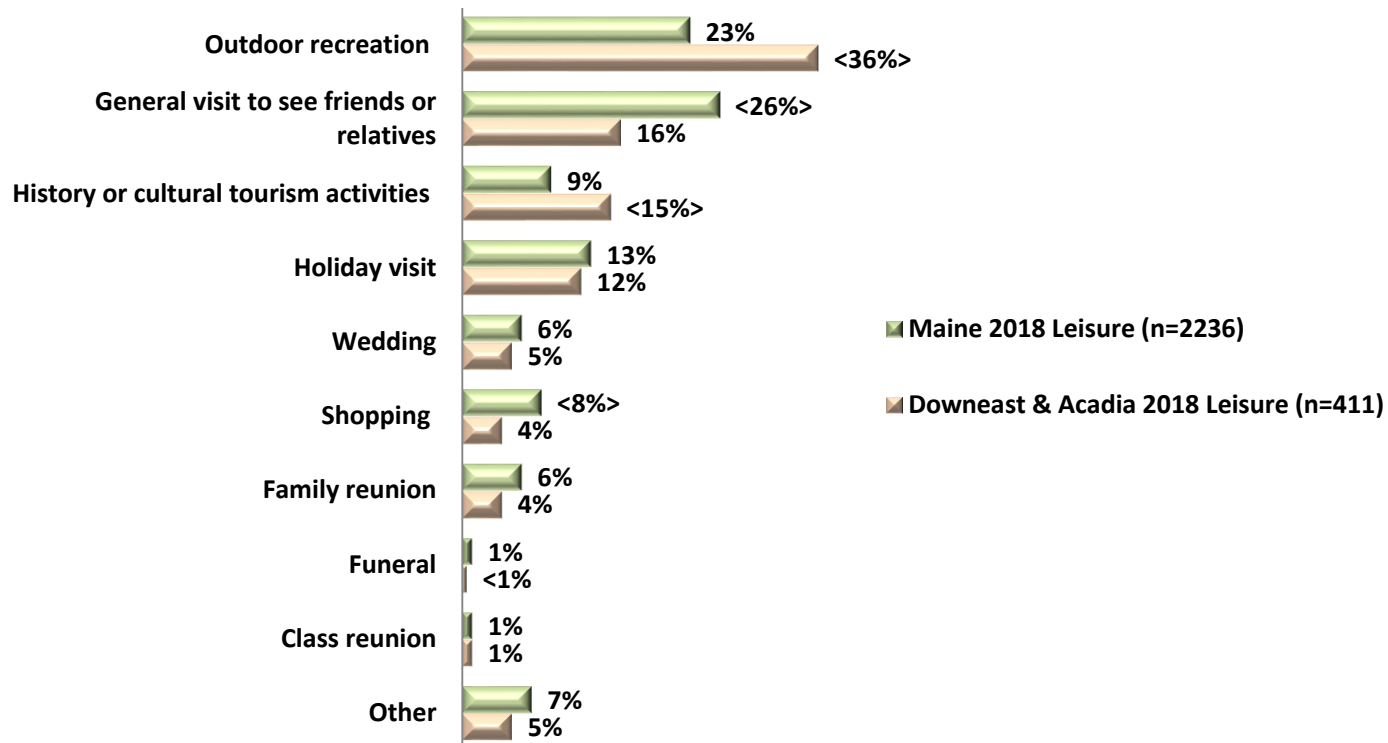
PRIMARY PURPOSE OF OVERNIGHT BUSINESS TRIPS



Outdoor recreation was the most common purpose of overnight leisure trips in 2018.

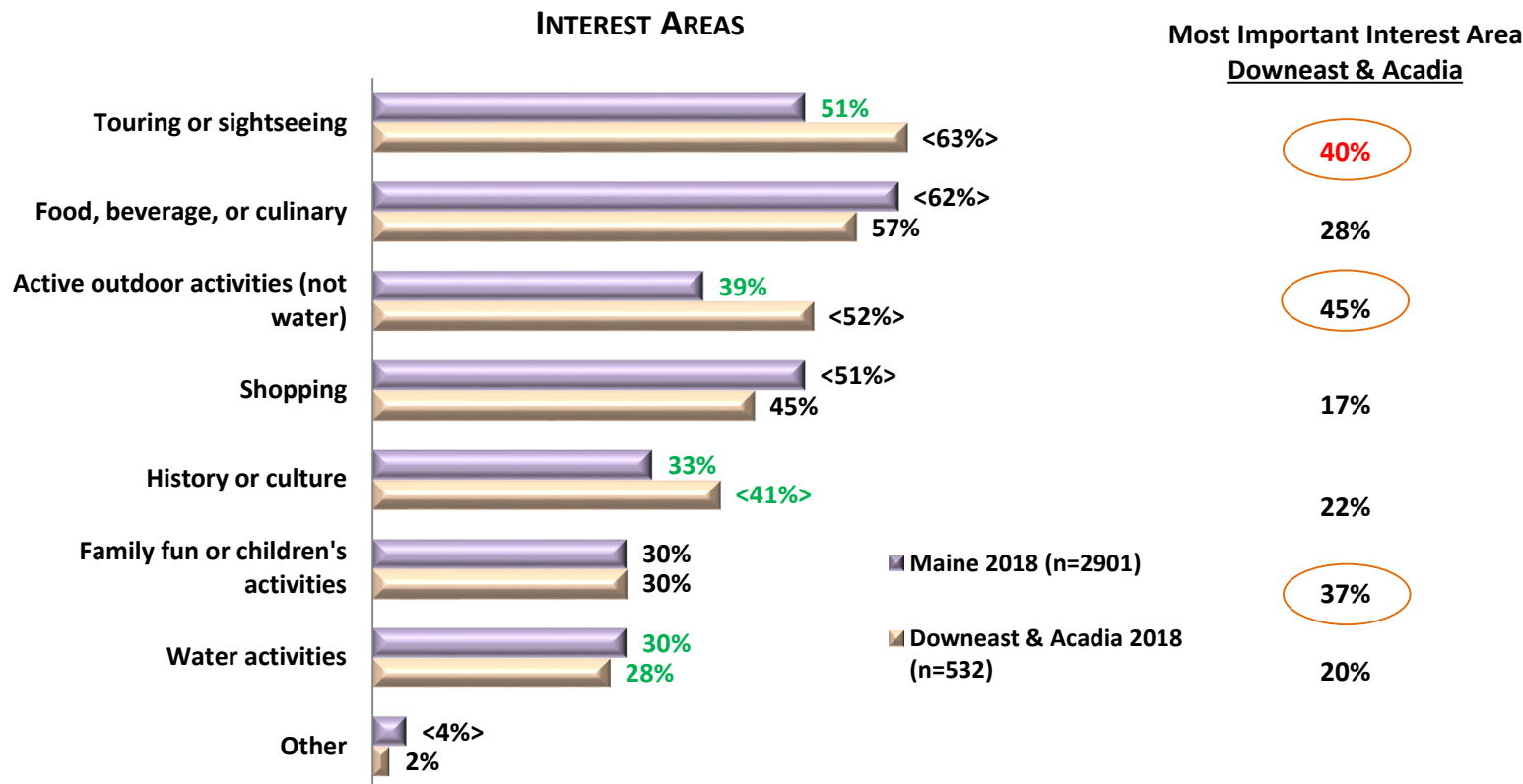
- Leisure trips to the region were more likely than those statewide to be for outdoor recreation or cultural purposes.

PRIMARY PURPOSE OF OVERNIGHT LEISURE TRIPS



Sightseeing and culinary activities were the *most common* interests in the region, though outdoor activities, shopping, and cultural pursuits were also common. Outdoor activities, touring, and family fun were the *most important* interests.

- Overnight visitors to the Downeast & Acadia region were more likely than visitors to the state of Maine as a whole to be interested in: touring/sightseeing, active outdoor activities, and history and culture.
- Visitors to this region were less likely to be interested in shopping.

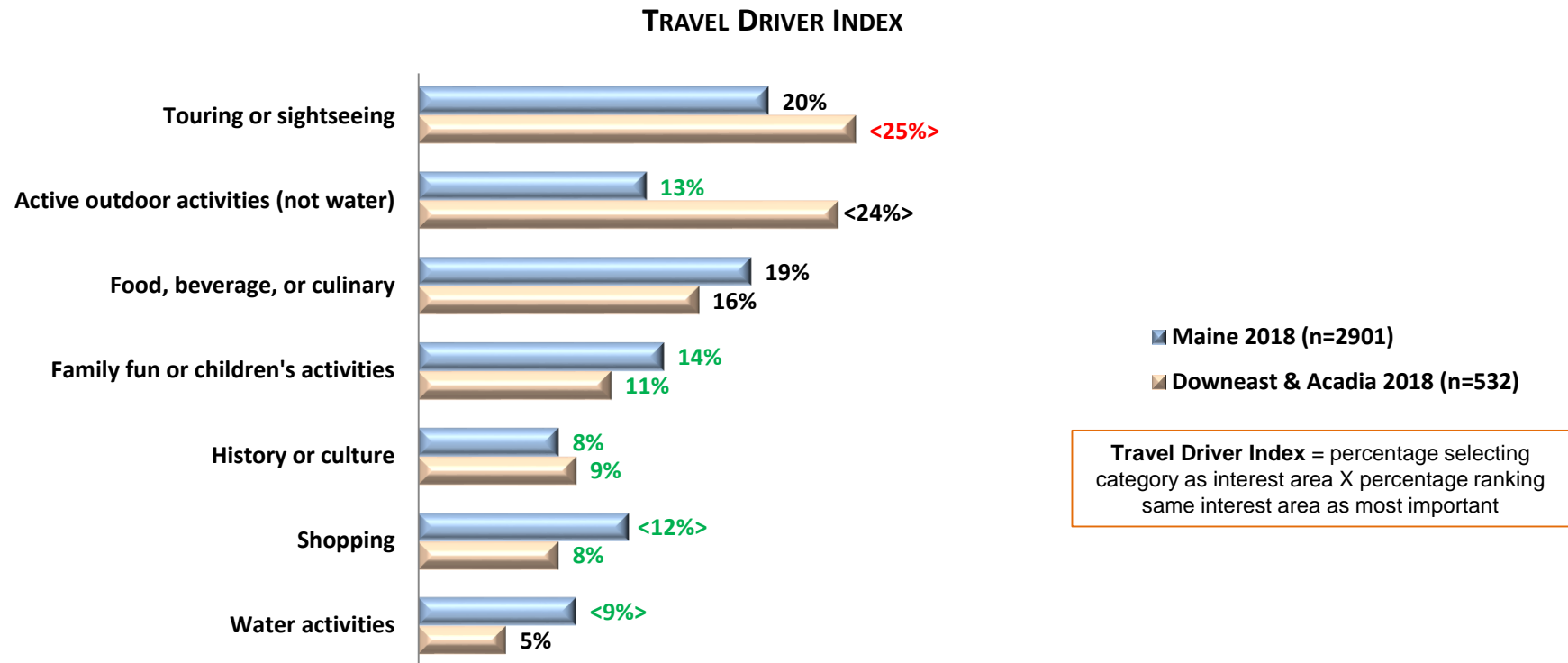


Q35. Which of the following *interest areas* did you want to pursue during this trip to Maine? *Please check all that apply.*
 Q36. Of these interest areas you selected, please rank them in order of their importance in your decision to come to Maine, with 1 being the most important. 23
 <> indicates a significant difference between this region and the State at the 95% confidence level.
 Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.



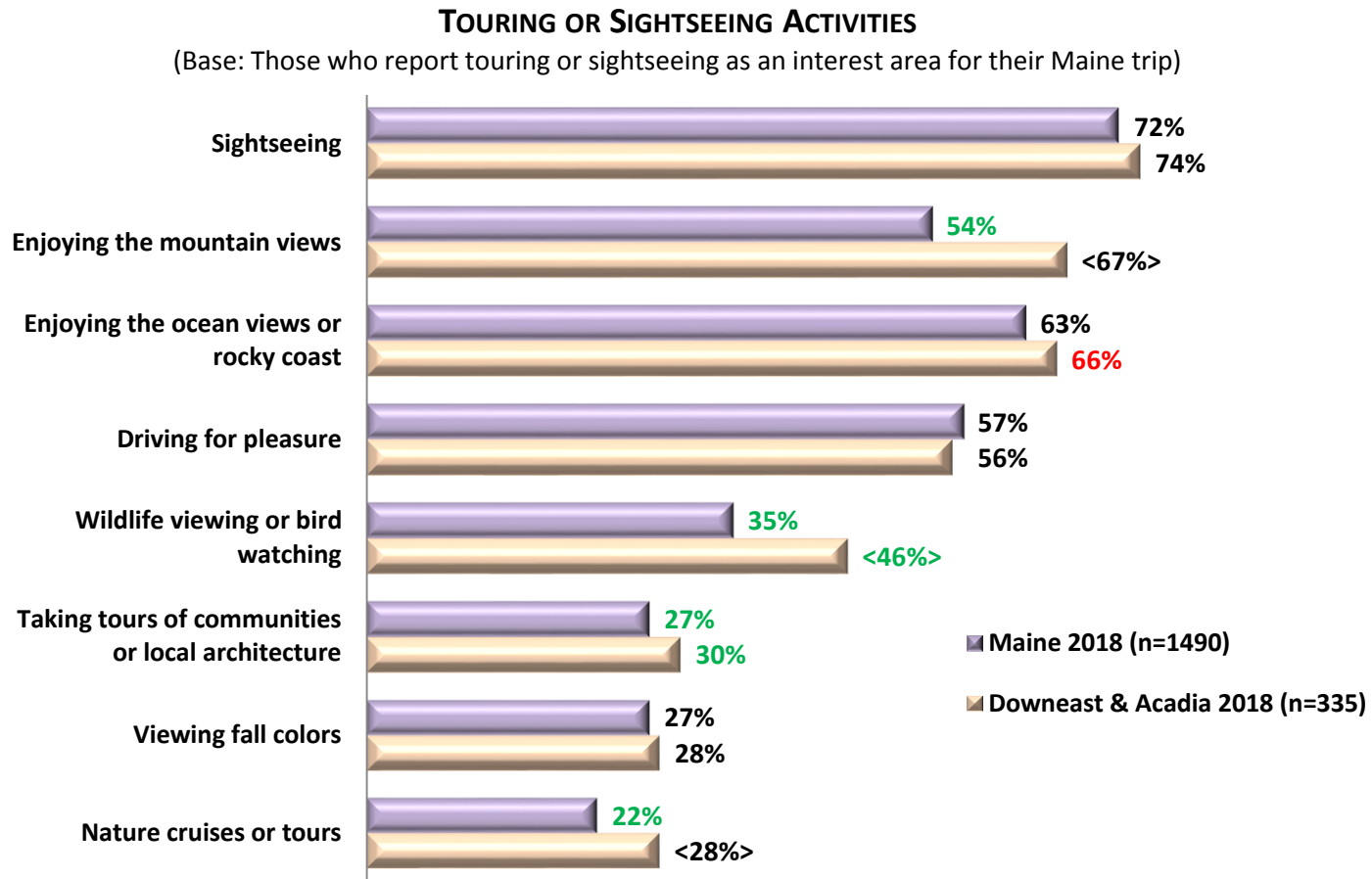
Sightseeing and active outdoor activities were the strongest drivers of overnight visits to the region overall.

- In addition, both sightseeing and active outdoor activities were more of a visitation driver for Downeast & Acadia visitors than for the state as a whole.



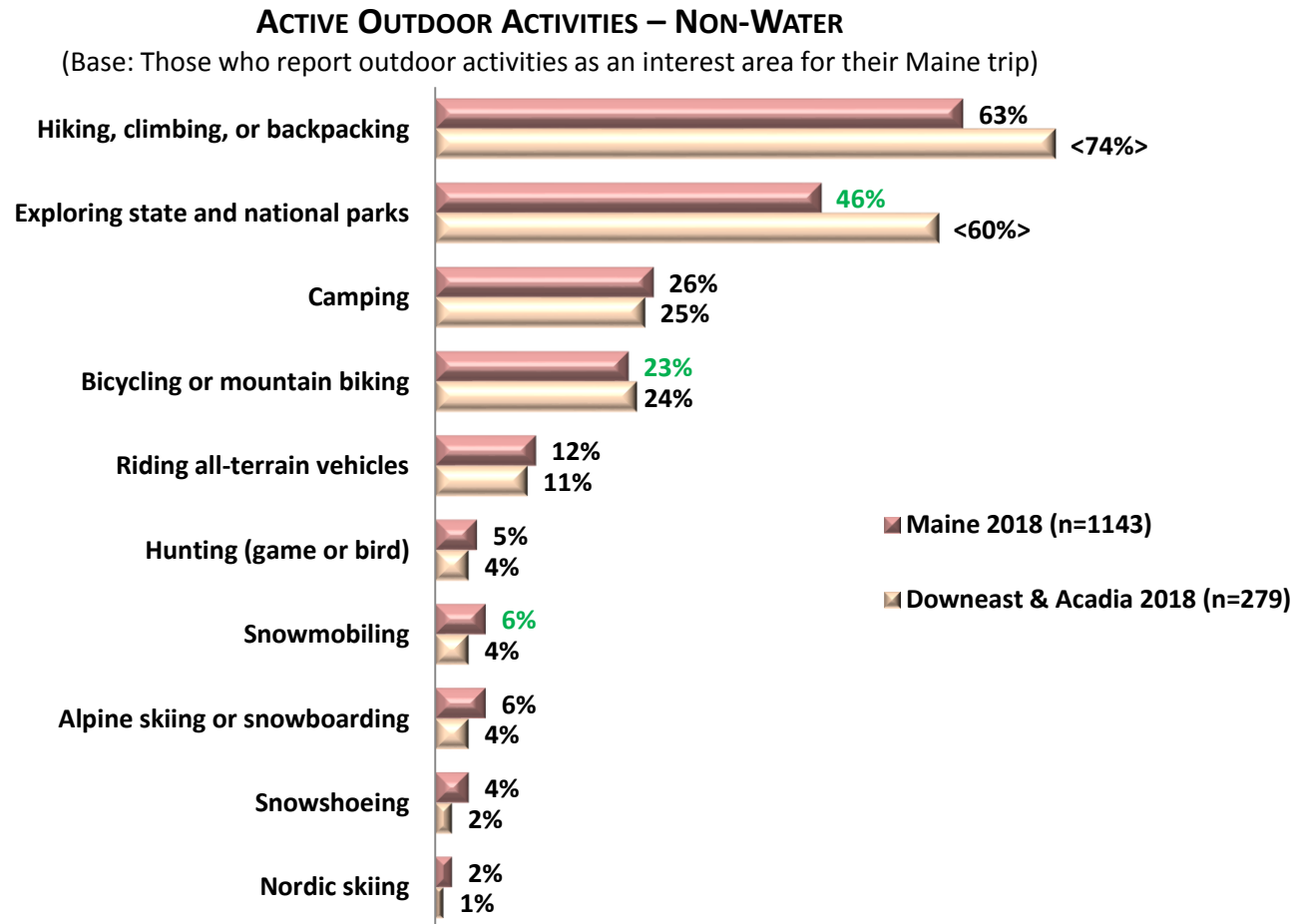
Visitors engaged in a variety of sightseeing activities in the region, most commonly sightseeing generally, and enjoying the mountain or ocean views. Many also went on a pleasure drive or watched wildlife.

- Enjoying mountain views and watching wildlife were more common in the region than in the state as a whole.



The most popular active outdoor activities in the region – by far – were hiking and exploring state or national parks.

- Both of those activities were more popular among visitors to the region than among visitors to the state as a whole.



Q37. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

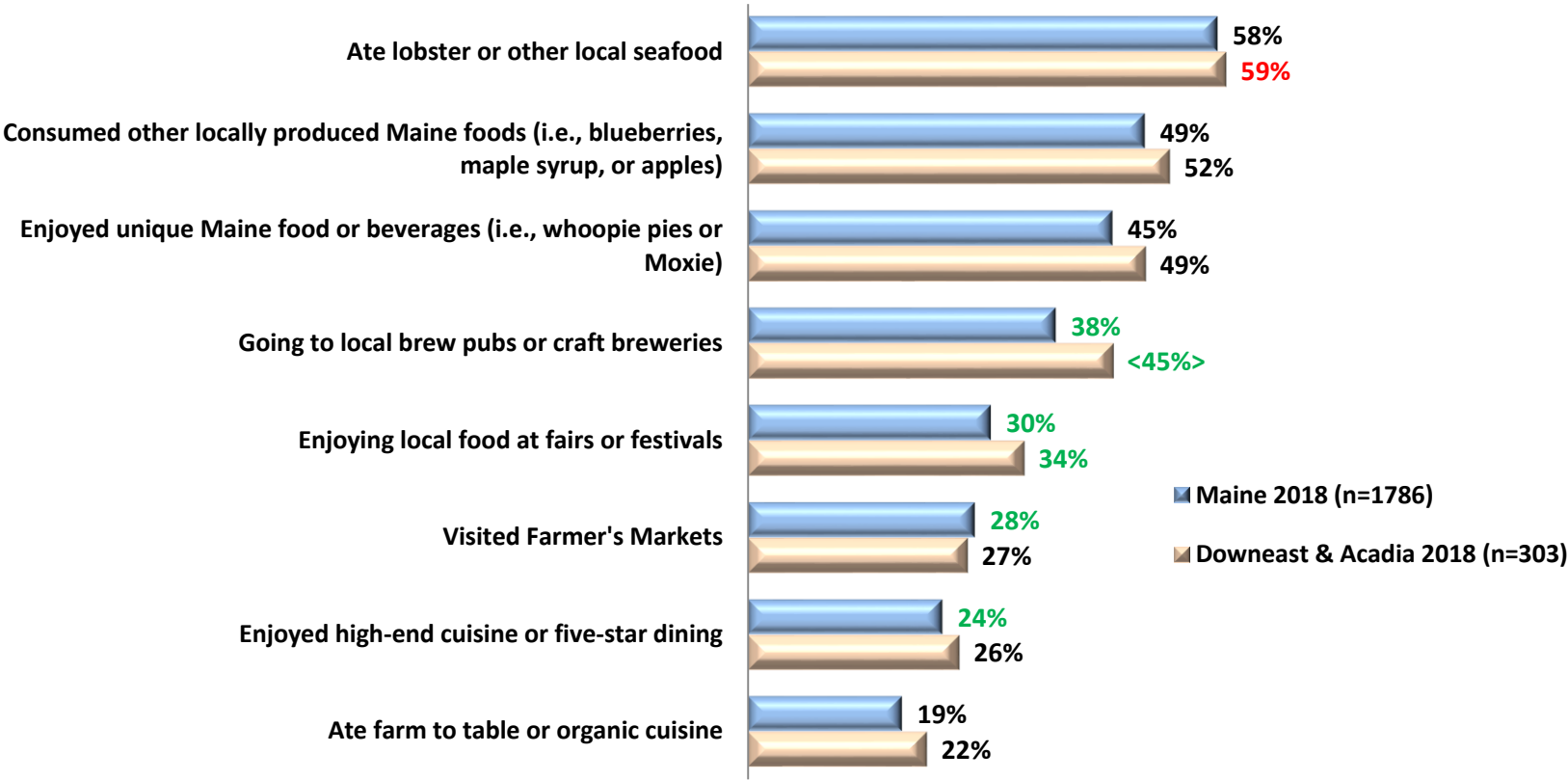
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Eating lobster or other local seafood remained the most common culinary activity, though eating other types of foods and going to brew pubs were also popular in 2018.

- Going to brew pubs or craft breweries was more common in 2018 than in 2017 for both the region and the state.
- Going to local food fairs or festivals also saw an uptick from 2017, both regionally and statewide.

FOOD, BEVERAGE, OR CULINARY ACTIVITIES

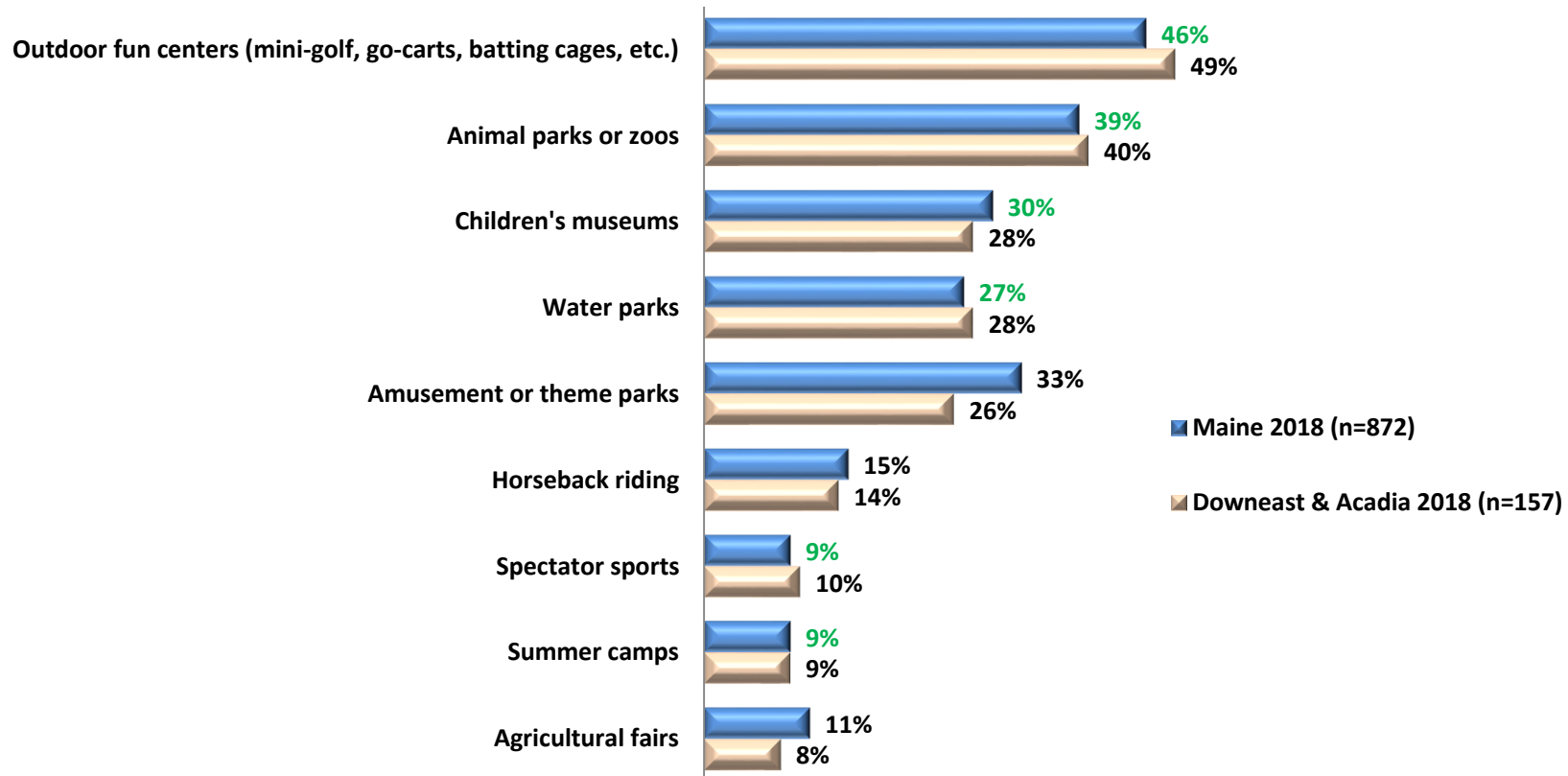
(Base: Those who report food, beverage, or culinary activities as an interest area for their Maine trip)



Outdoor fun centers continued to be the most popular family activity in the region, followed by animal parks.

FAMILY FUN/CHILDREN'S ACTIVITIES

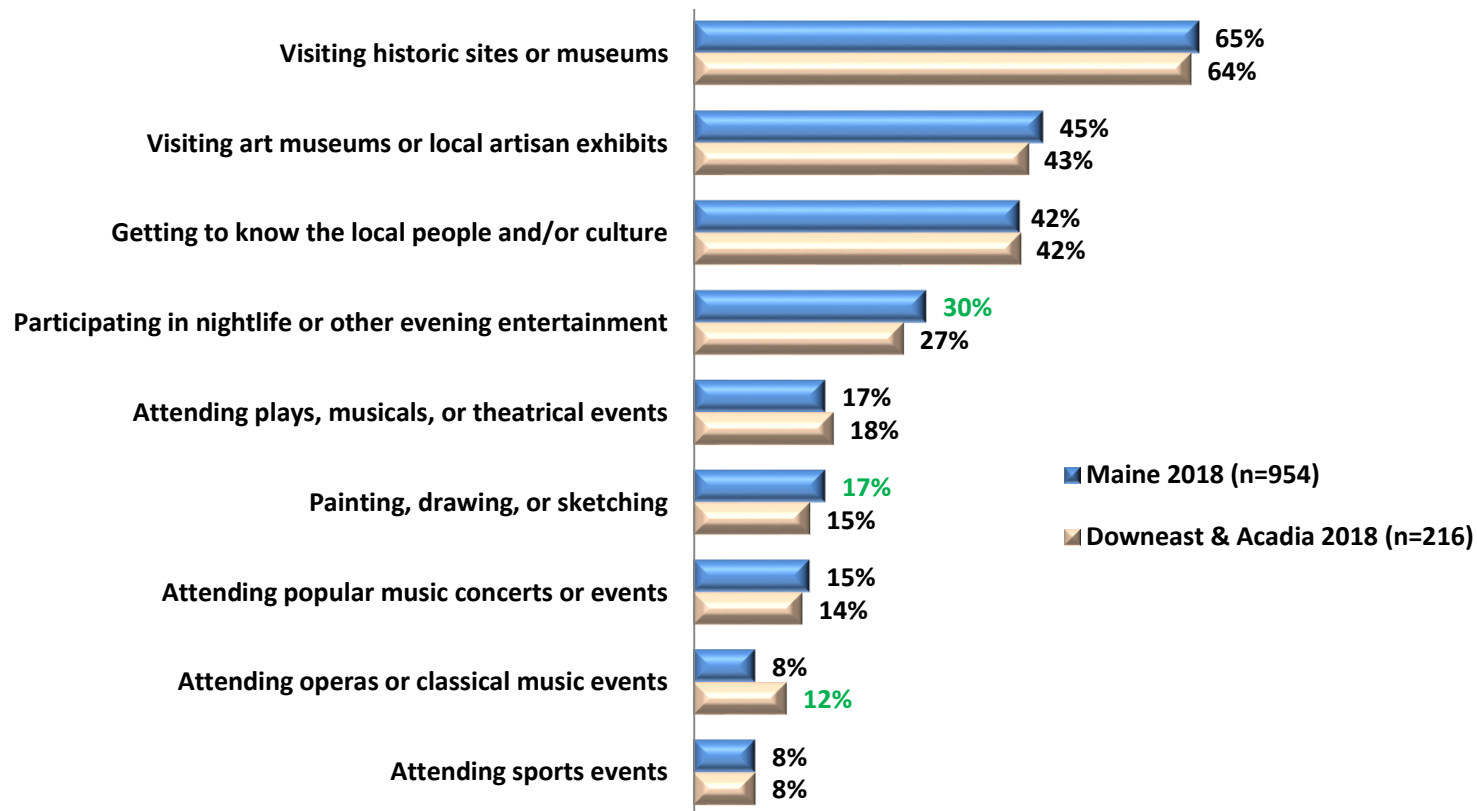
(Base: Those who report family fun/children's activities as an interest area for their Maine trip)



Visiting historic sites or museums remained the most popular cultural activity for overnight visitors, though going to art displays and getting to know the local culture were also popular.

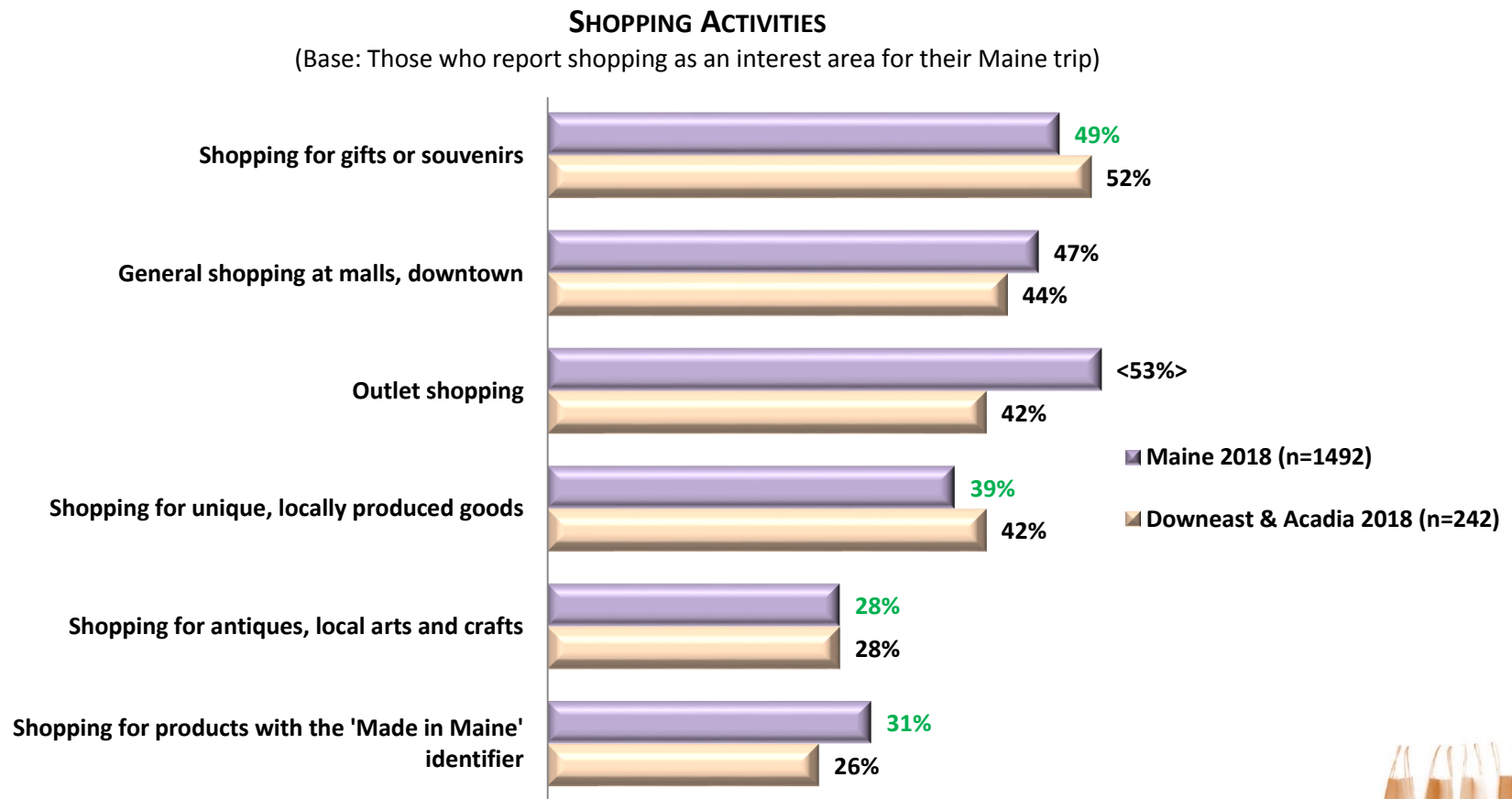
HISTORY OR CULTURE ACTIVITIES

(Base: Those who report history or culture as an interest area for their Maine trip)



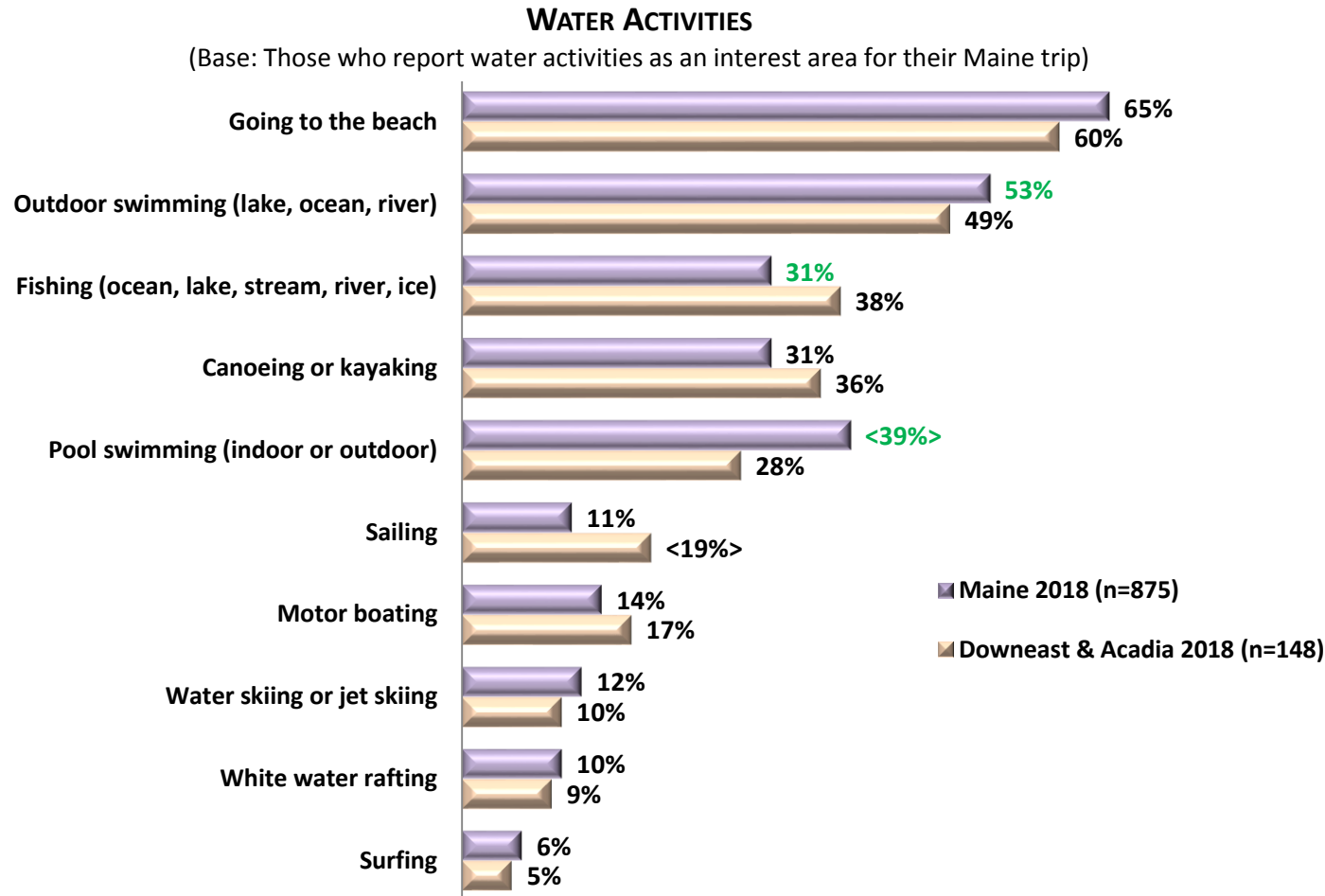
Looking for gifts or souvenirs; shopping in malls, downtowns, or in outlets; and looking for locally-produced goods were the most common shopping activities in the Downeast & Acadia region.

- Outlet shopping was less popular among overnight visitors to this region than among visitors to the state as a whole.



Going to the beach was the most common aquatic pursuit among overnight visitors to the region, followed by outdoor swimming, fishing, canoeing or kayaking, and pool swimming.

- Sailing was a more popular water activity in the region compared to statewide.



Acadia National Park was, by far, the most popular destination in the region, with over half of overnight visitors going to the park during their stay. Many also visited Cadillac Mountain.

➤ Many destinations were more popular in 2018 than 2017.

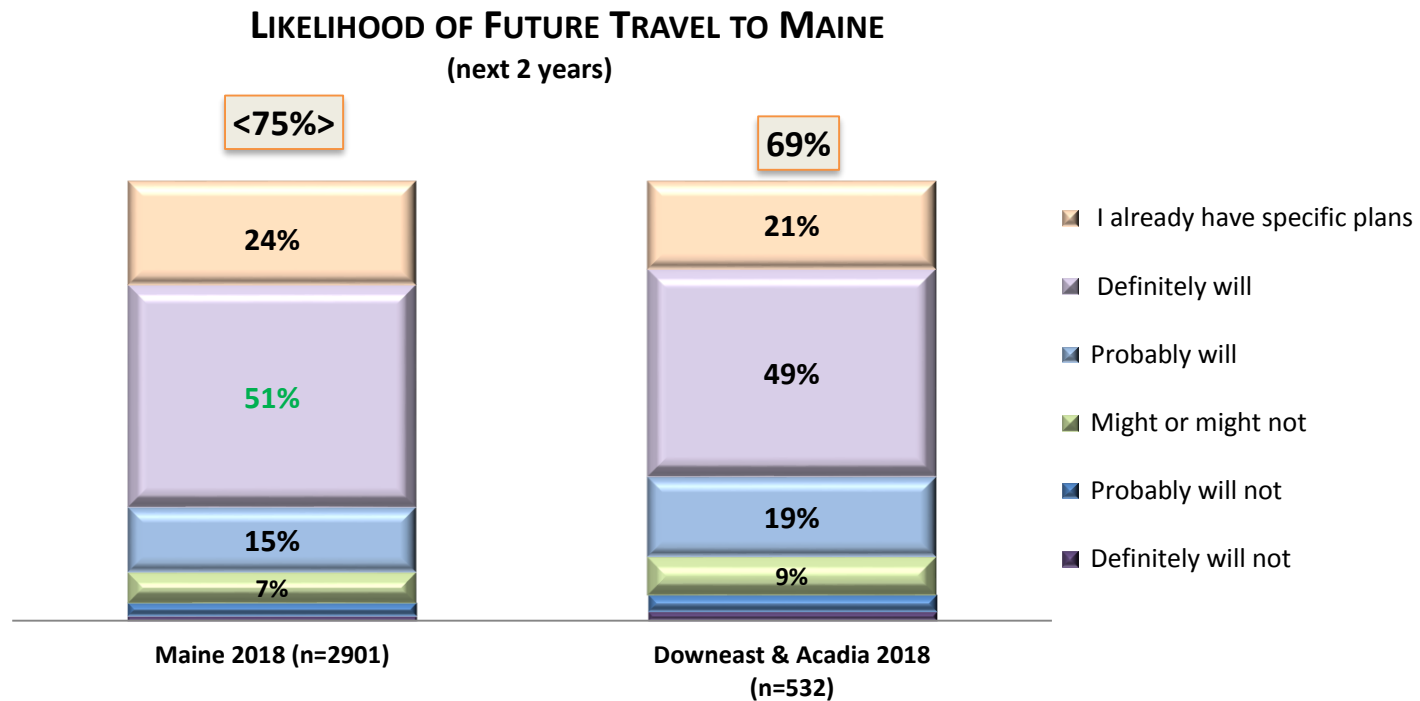
% VISITING			
Top destinations		Less popular destinations*	
56%	Acadia National Park	8%	Passamaquoddy Bay
31%	Cadillac Mountain	8%	Quoddy Head State Park
20%	Reversing Falls	8%	Old Sow Whirlpool
19%	Mount Desert Island	8%	Roque Bluffs State Park
16%	Maine Beer Trail	8%	Burnham Tavern Museum
14%	Downeast Sunrise Trail	8%	Lamoine State Park
11%	Abbe Museum	7%	Schoodic Education Center
10%	Moosehorn Wildlife Refuge	7%	Penobscot Narrows Bridge & Obs.
10%	Woodlawn Museum	7%	Roosevelt Campobello Int. Park
9%	Asticou Azalea Garden	6%	Sculpture Symposium/Trail
9%	St. Croix Island Int. Historic Site	5%	Cutler Coast Public Reserve

* Does not show attractions visited by fewer than 5% of visitors.

(n=532)

The likelihood of returning to Maine was high among the region's overnight visitors: one in five had made specific plans to return and another half said they will definitely return.

- Overnight visitors to the Downeast & Acadia region were less likely than visitors to the state of Maine as a whole to be highly likely to return to Maine in the next two years.



DAY VISITORS





Profile of Day Visitors

Day Visitor Demographics

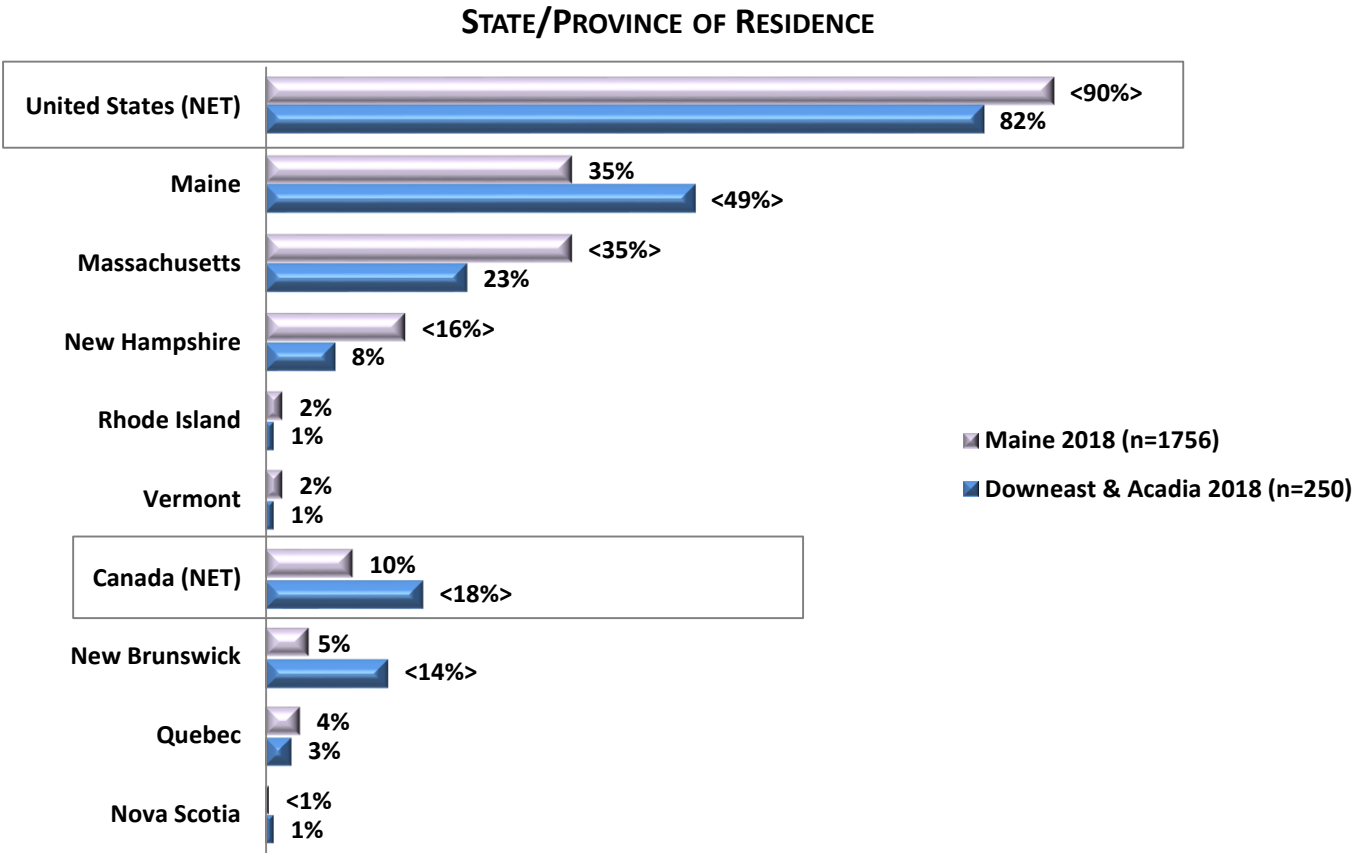
- In 2018, the typical day visitor to the Downeast & Acadia region was 44 years old and had an income of about \$64,000 per year. Half had a college degree or more education; just as many were married.
- On average, those traveling to the region had significantly less income compared to their cohort from 2017 (\$73.3K) and 2018 statewide day visitors (\$74.1K).

	Maine 2018 (n=1756)	Downeast & Acadia 2018 (n=250)
Age:		
< 35	37%	35%
35 - 44	18%	19%
45 - 54	16%	18%
55 +	28%	28%
Mean	43.0	43.7
Income:		
< \$50,000	38%	<48%>
\$50,000 - \$99,999	39%	33%
\$100,000 +	22%	19%
Mean	<\$74,100>	\$63,800
Female	78%	73%
College degree or higher	<58%>	50%
Married	49%	48%
Employed full-time	49%	46%

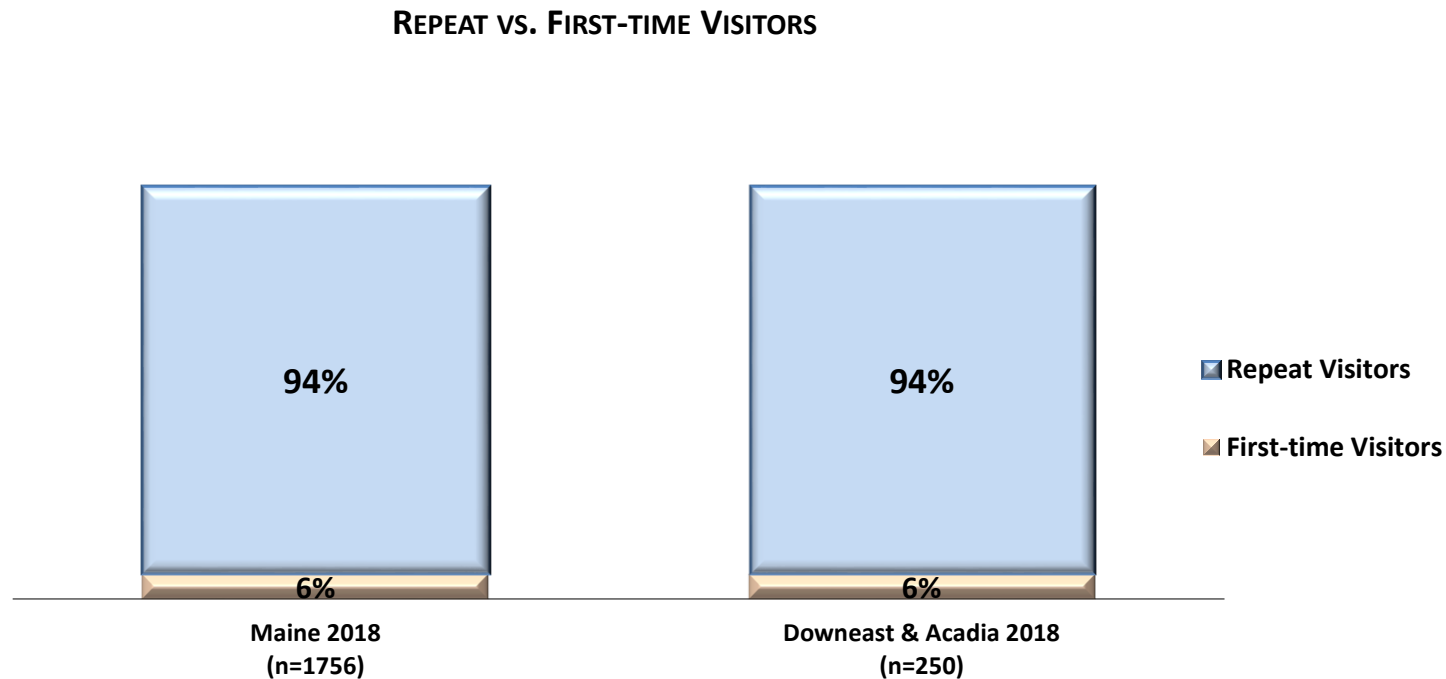
<> indicates a significant difference between this region and the State at the 95% confidence level.

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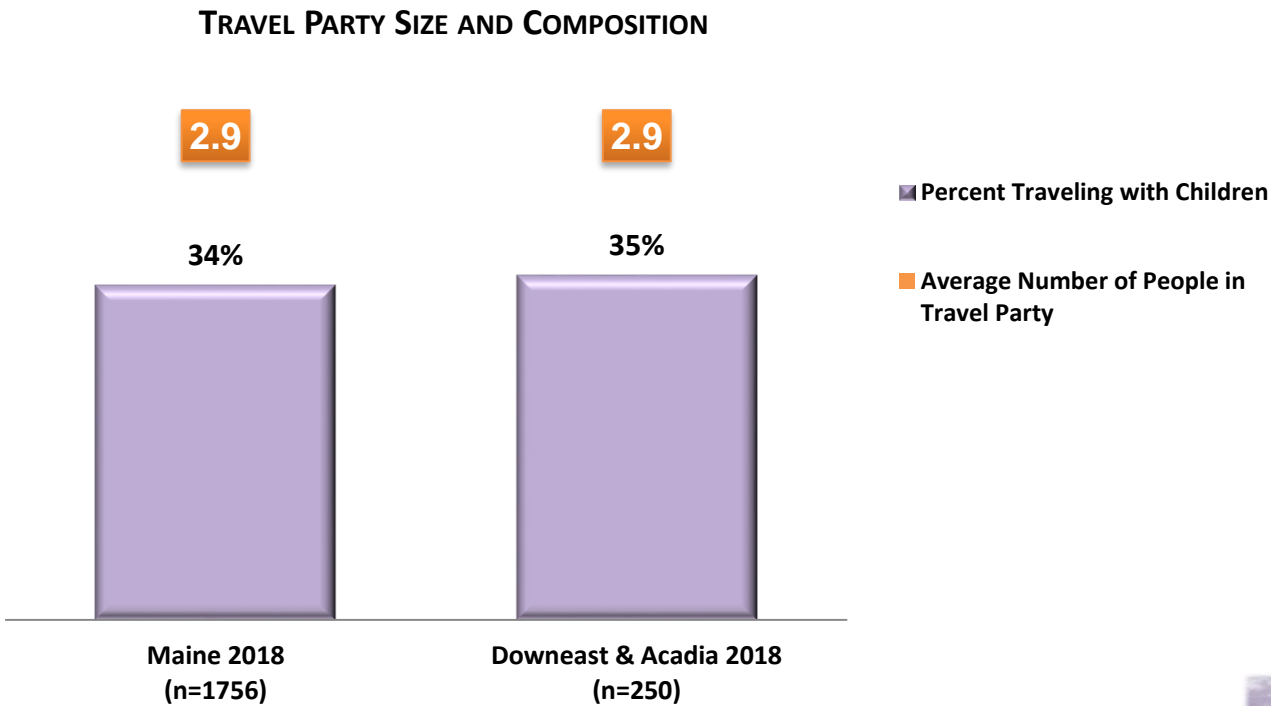
The vast majority of day visitors to the region in 2018 were U.S. residents – most commonly residents of Maine or Massachusetts. Two out of ten visitors to the region were Canadians – most often residents of New Brunswick.



Consistent with the state as a whole, most day trippers to the Downeast & Acadia region had visited Maine before.



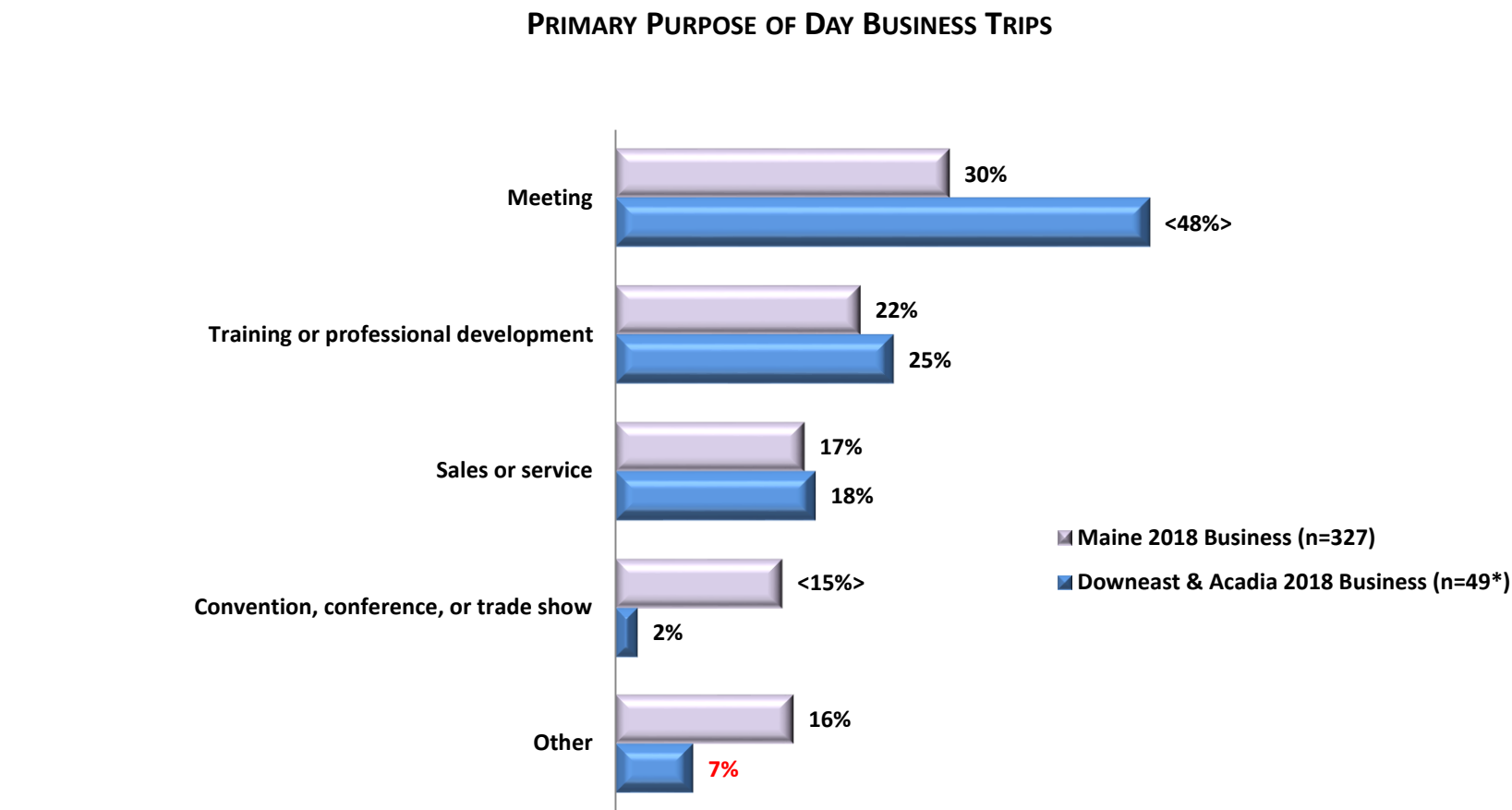
Roughly one-third of parties visiting the region for the day included children. The average party size was about three people, for both the region and the state.





Day Visitors: Trip Experience

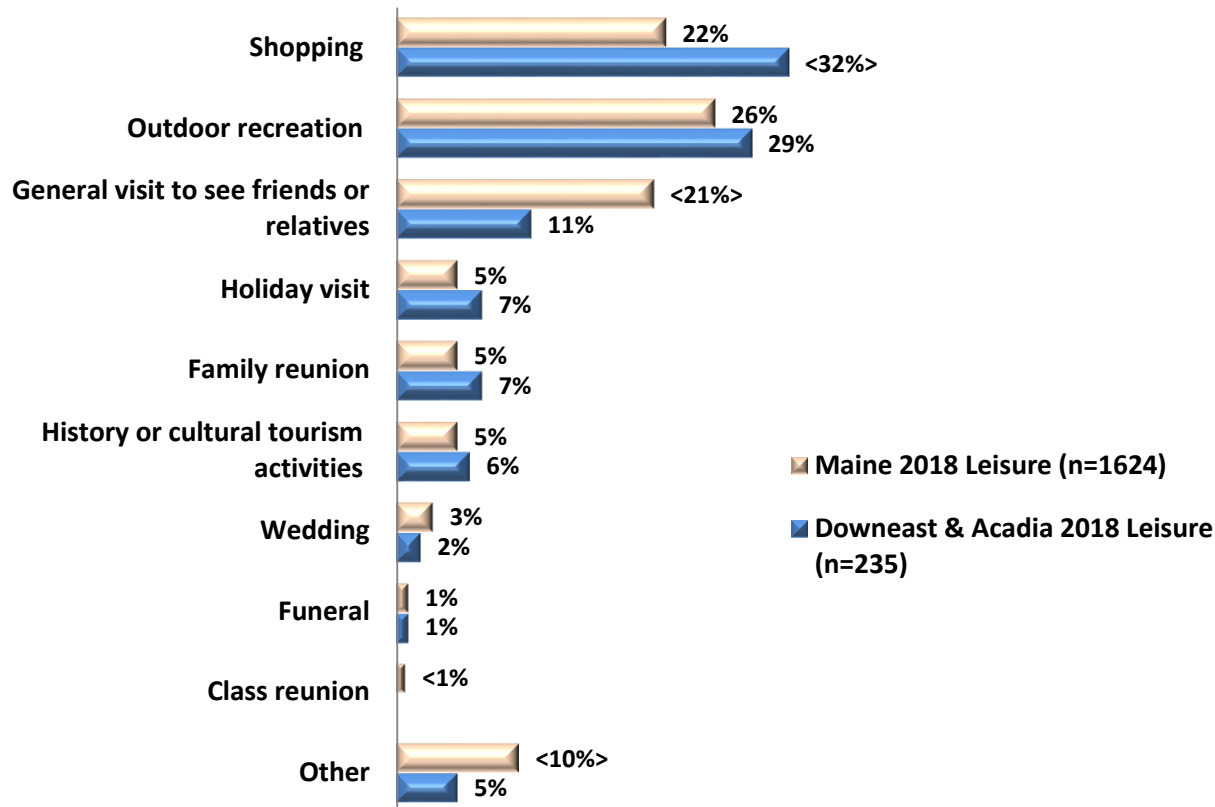
Many day business travelers came to the Downeast & Acadia region for a meeting – significantly more than the percentage coming to Maine overall for the same purpose.



Shopping and outdoor recreation were the most common reasons for taking leisure day visits to the Downeast & Acadia region in 2018.

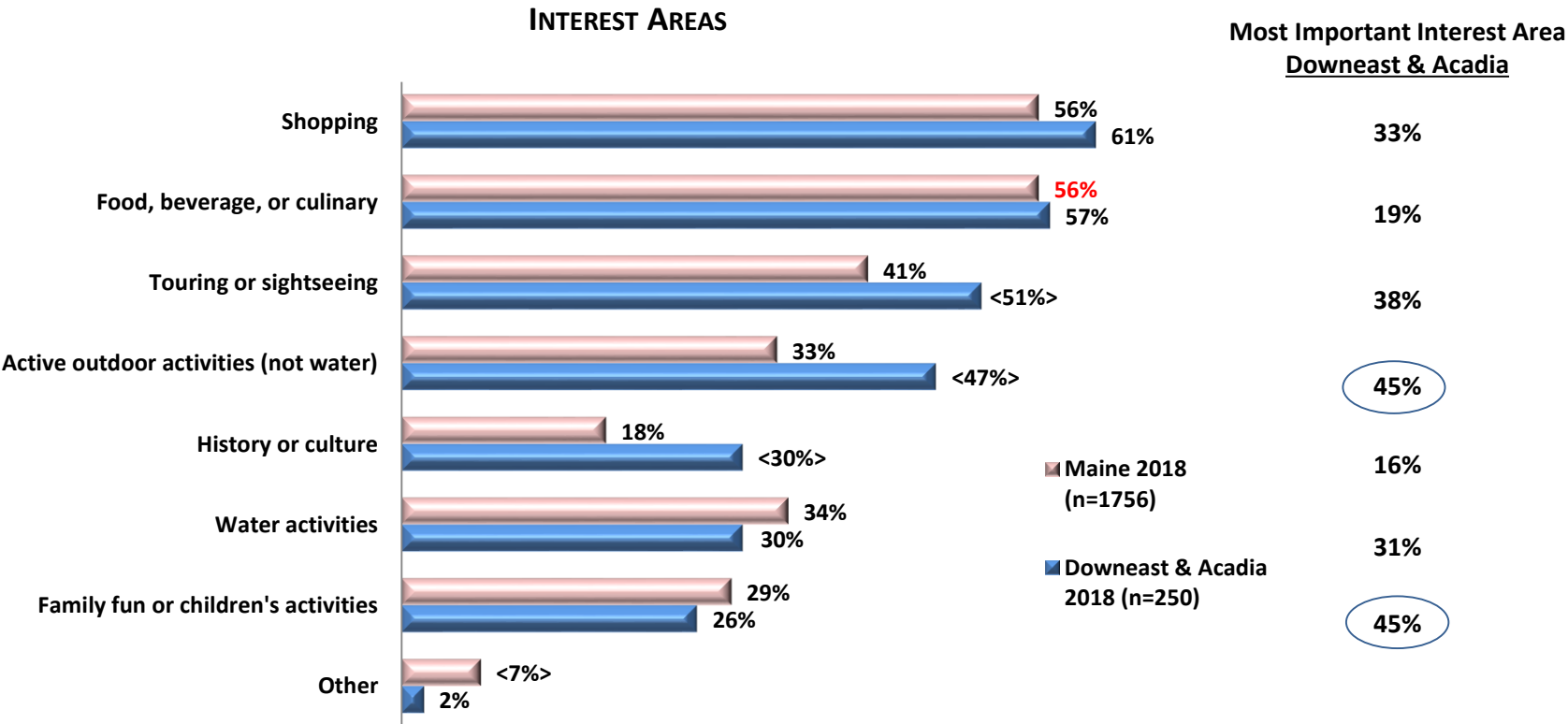
- Downeast & Acadia day travelers were more likely than day travelers to the state as a whole to have visited Maine to shop; on the other hand, they were less likely to have taken a general trip to visit friends or relatives.

PRIMARY PURPOSE OF DAY LEISURE TRIPS



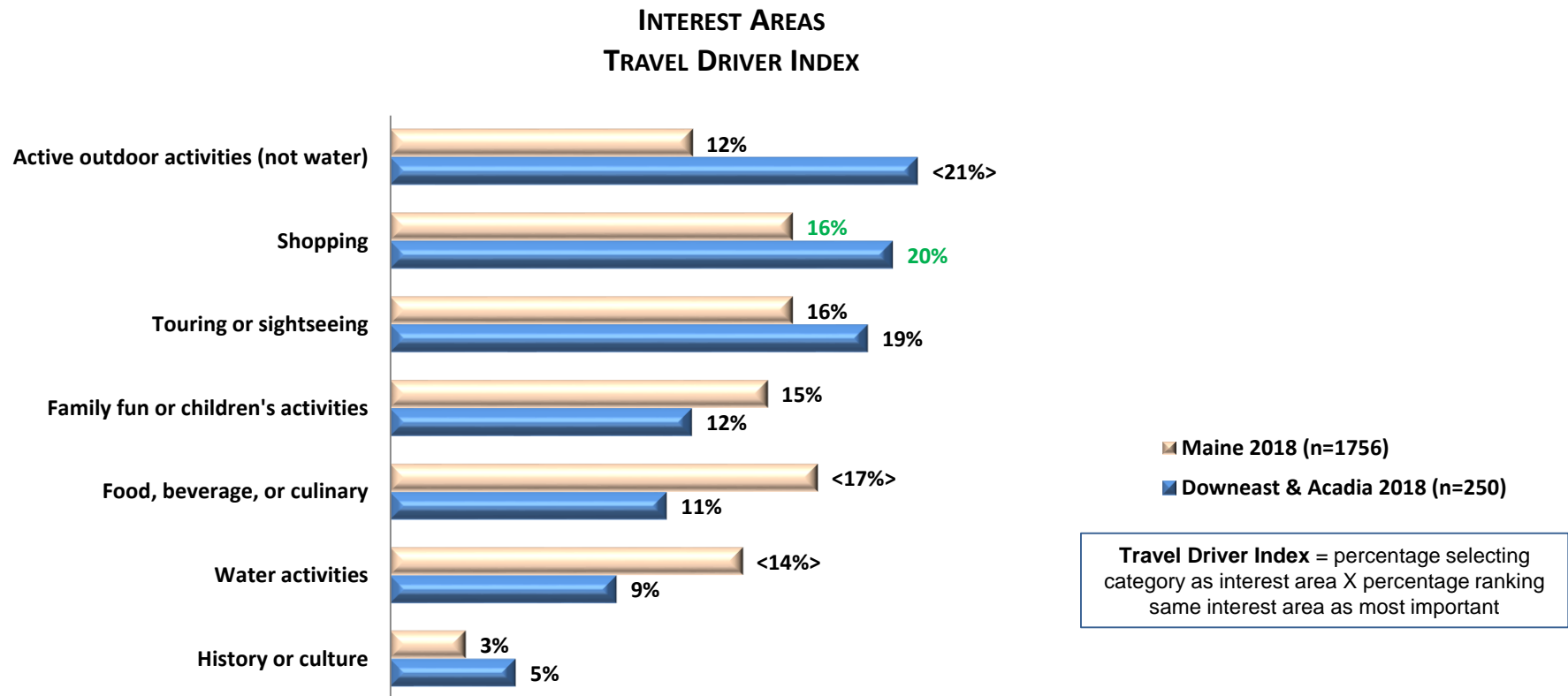
The *most common* activities on day trips to the region were related to shopping, culinary enjoyment, sightseeing, and land-based outdoor activities. The *most important* interests were outdoor activities and family fun.

- Day visitors to the Downeast & Acadia region were more likely than day visitors to Maine overall to be interested in sightseeing, outdoor activities, and cultural activities.



When combining interest and importance, active (non-aquatic) outdoor activities, shopping, and touring/sightseeing ranked as the top drivers of day visitation to the region.

- Active outdoor activities were a more important driver of day visitation to the Downeast & Acadia region than to the state as a whole.
- Culinary activities and water activities were less common interests for visitors to the region than for visitors across the state more generally.

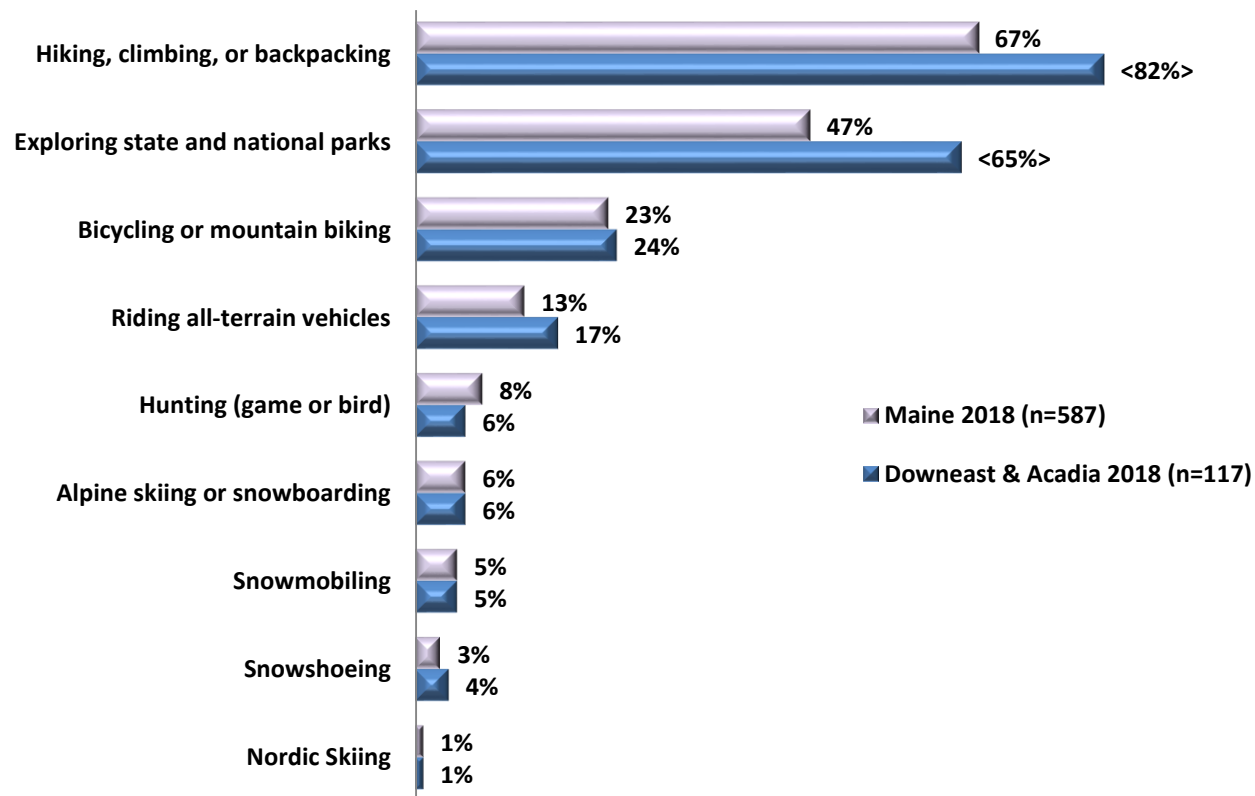


Hiking and exploring state or national parks were, by far, the most popular active outdoor activities in the region.

- Hiking and visiting state or national parks were also more popular among visitors to the region than among visitors to the state overall.

ACTIVE OUTDOOR ACTIVITIES – NON-WATER

(Base: Those who report outdoor activities as an interest area for their Maine trip)



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

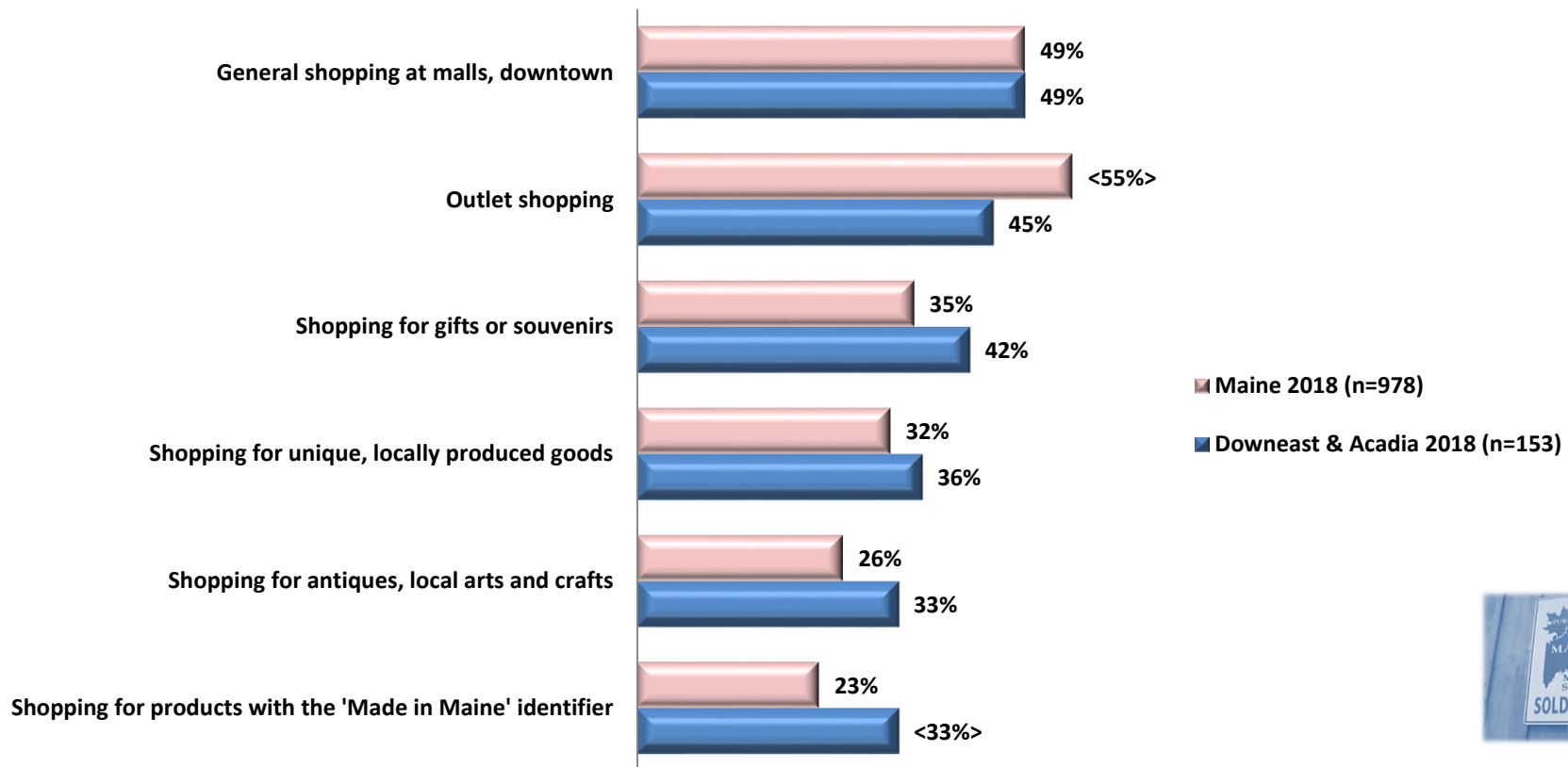
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Shoppers in the region go to a number of venues and shop for a variety of items.

- Day visitors to the Downeast & Acadia region were more likely to shop for “Made in Maine” products than were day visitors to the state of Maine overall.

SHOPPING ACTIVITIES

(Base: Those who report shopping as an interest area for their Maine trip)



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

<> indicates a significant difference between this region and the State at the 95% confidence level.

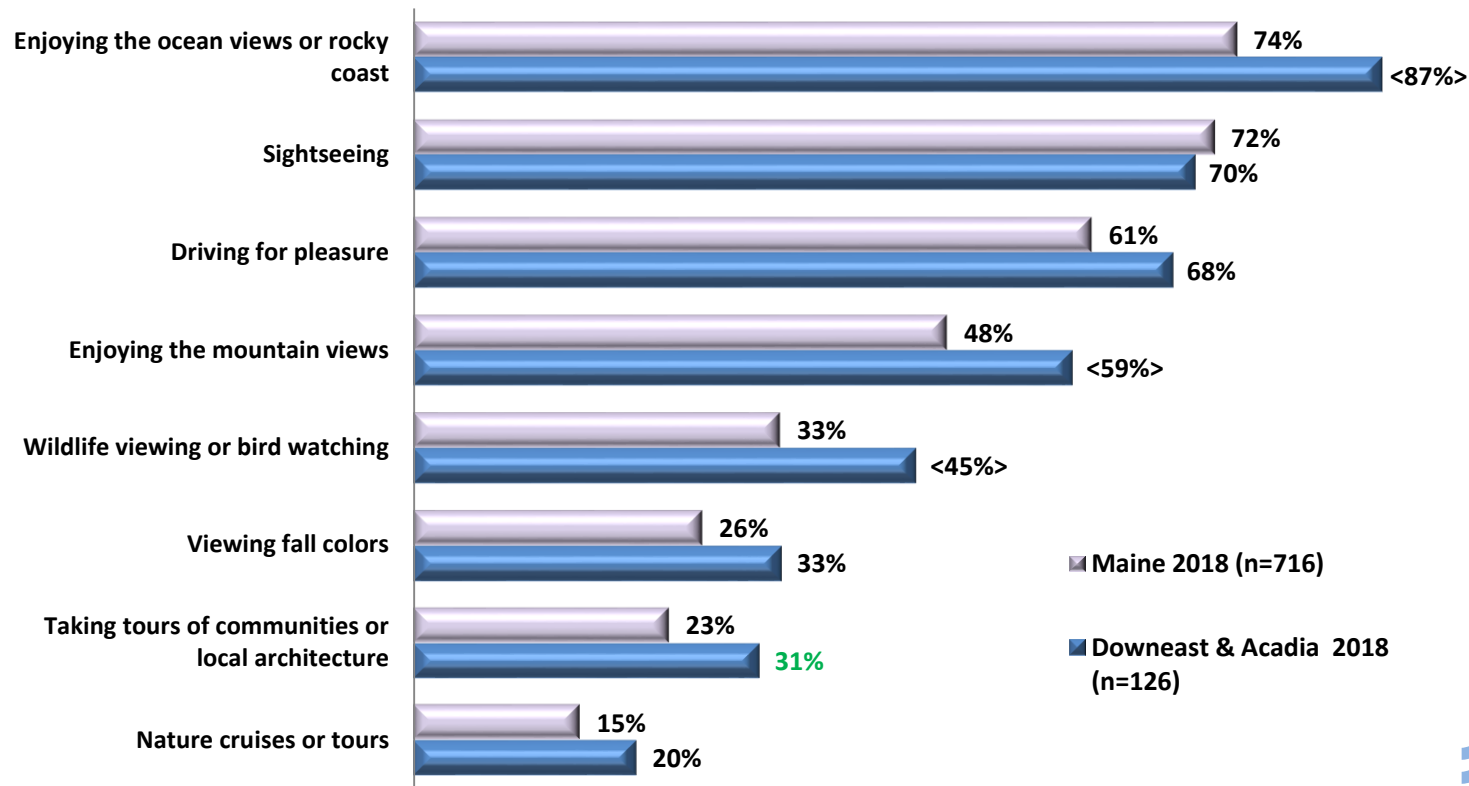
Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Enjoying coastal views was the most popular touring activity for day visitors in the region, followed by sightseeing in general and driving for pleasure.

- Taking in views of the coast or the mountains and watching wildlife were more popular among day visitors to the Downeast & Acadia region than among day visitors to the state as a whole.
- Touring the region's local communities and architecture became more popular between 2017 (when 17% engaged in that activity) and 2018 (31%).

TOURING OR SIGHTSEEING ACTIVITIES

(Base: Those who report touring or sightseeing as an interest area for their Maine trip)



Q20. In which of the following activities did you participate during this trip? *Please check all that apply.*

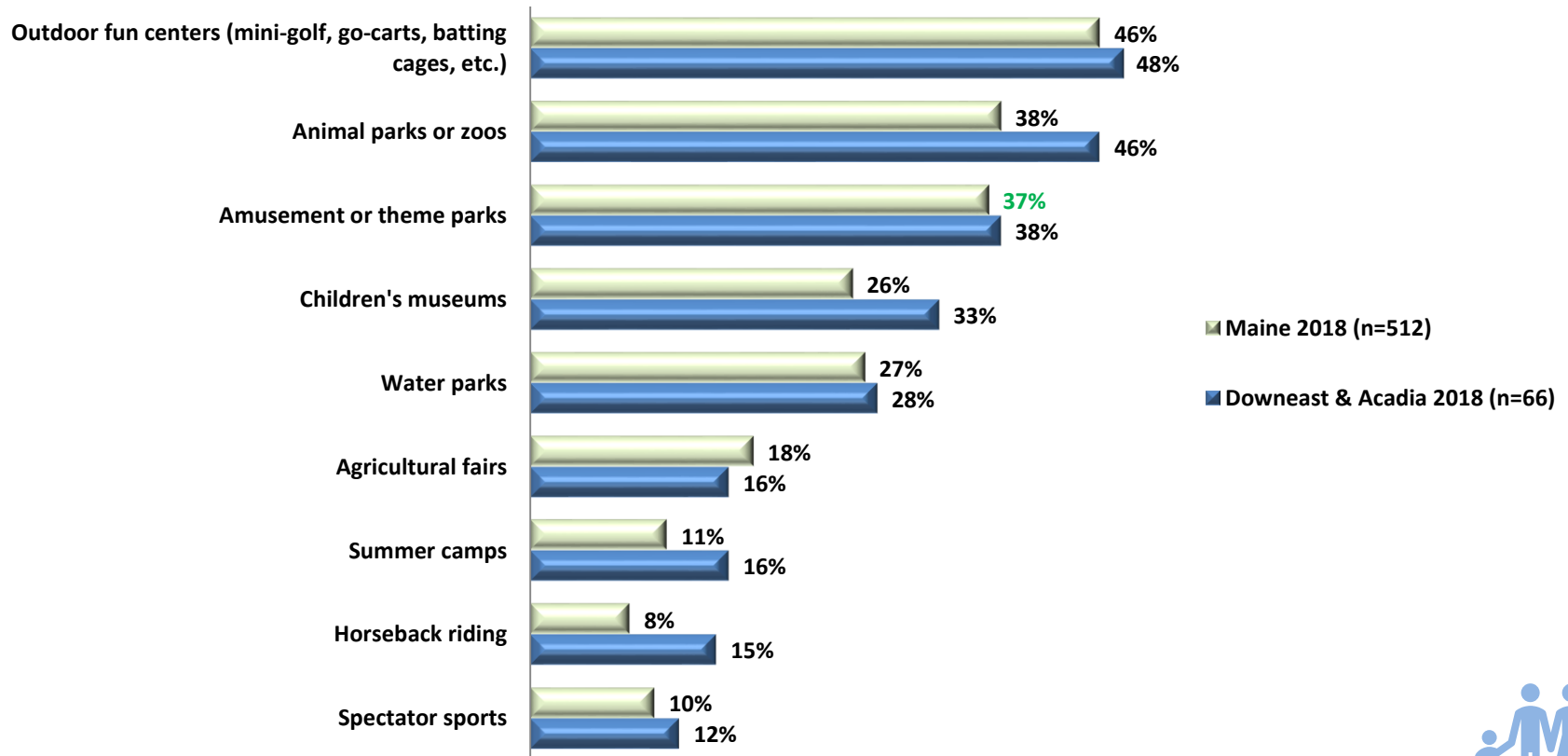
<> indicates a significant difference between this region and the State at the 95% confidence level.

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Outdoor fun centers and animal parks were the most common family-oriented activities among Downeast & Acadia day trippers, followed by amusement parks, children's museums, and water parks.

FAMILY FUN/CHILDREN'S ACTIVITIES

(Base: Those who report family fun/children's activities as an interest area for their Maine trip)

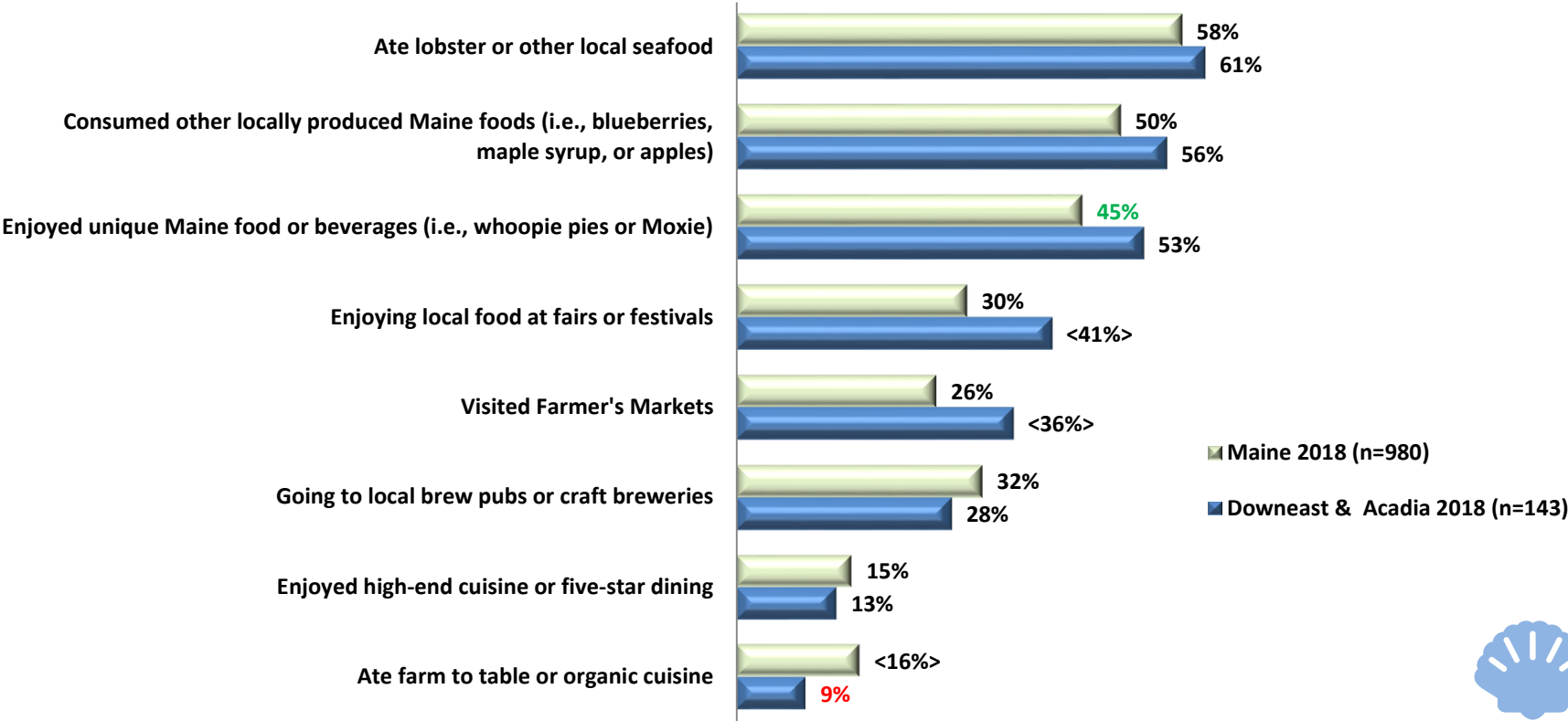


Eating authentic Maine cuisine remained a popular activity for visitors to the region – whether lobster and seafood, non-seafood fare, or other unique Maine items.

- Day visitors to the Downeast & Acadia region were more likely to consume local foods at fairs or festivals compared to visitors statewide.

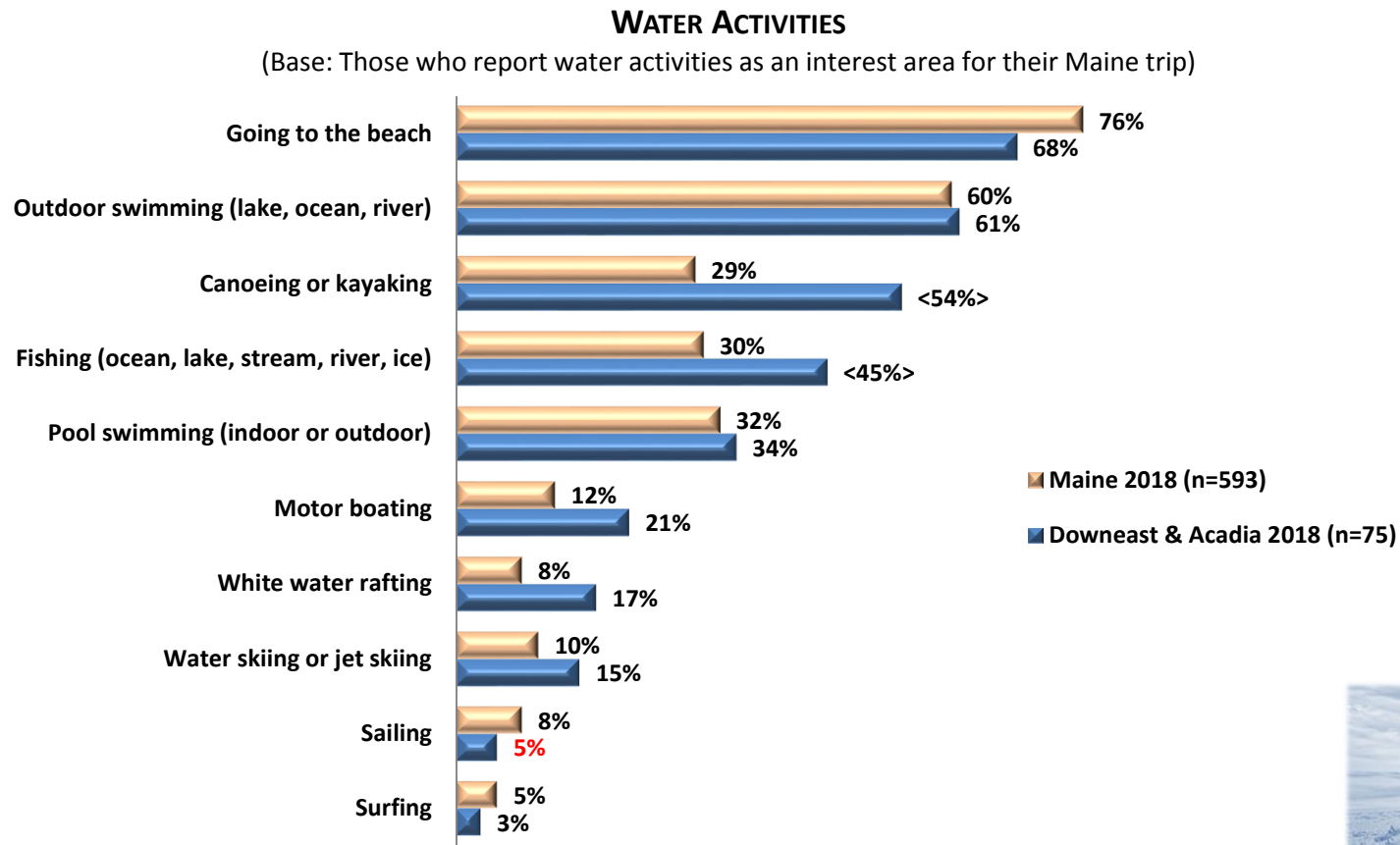
FOOD, BEVERAGE, OR CULINARY ACTIVITIES

(Base: Those who report food, beverage, or culinary activities as an interest area for their Maine trip)



Going to the beach and outdoor swimming were the most popular aquatic activities in the region, followed by canoeing and kayaking, and fishing.

- Canoeing/kayaking and fishing were more popular among day visitors to the Downeast & Acadia region than among day visitors to the state as a whole.

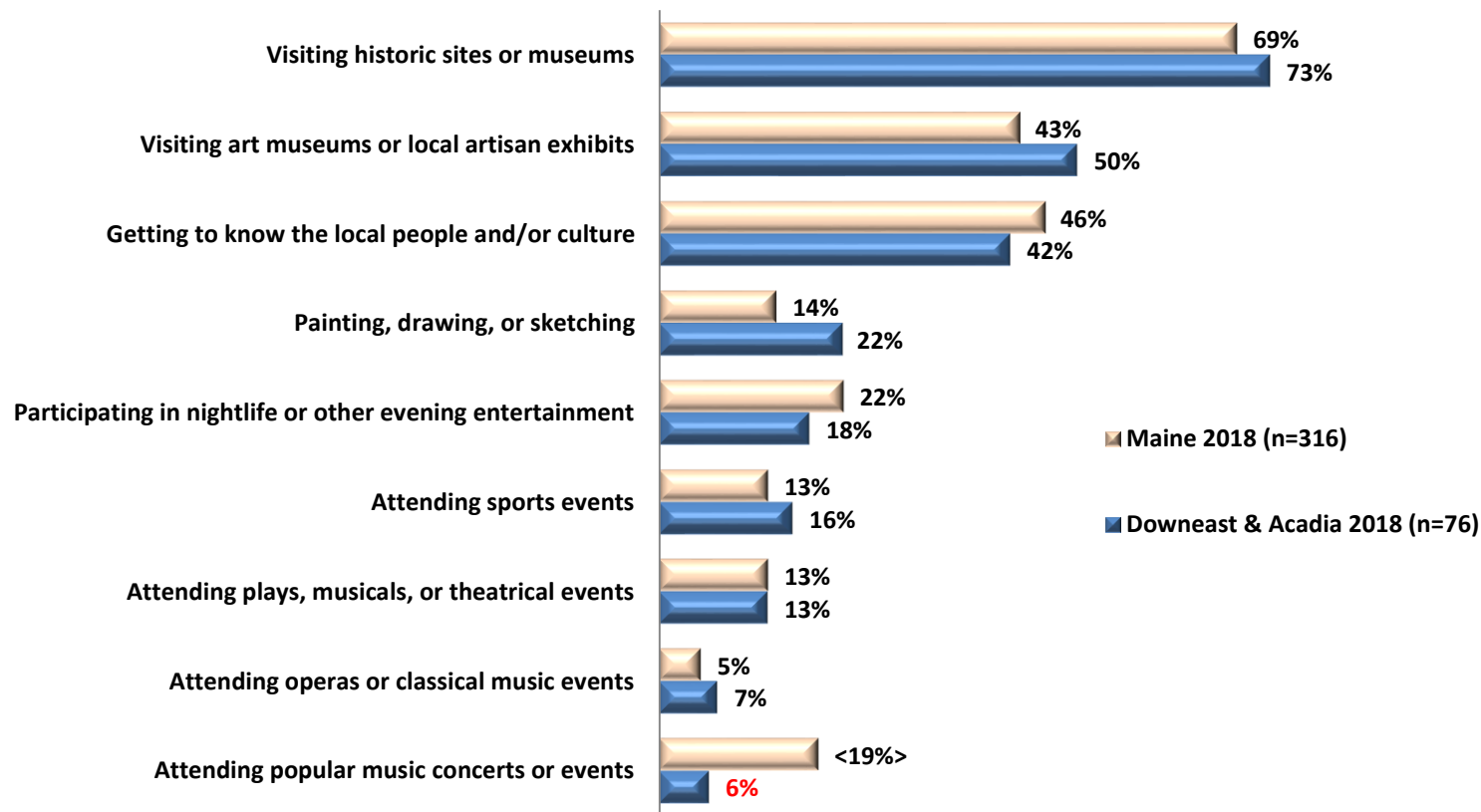


Three-quarters of Downeast & Acadia day visitors interested in history/culture visited historic sites or museums. Going to art museums or exhibits and getting to know the local culture were also popular among these visitors.

- One of the more popular activities among these visitors previously – attending music events or concerts – declined dramatically in popularity in 2018 (from 28% in 2017 to 6%).

HISTORY OR CULTURE ACTIVITIES

(Base: Those who report history or culture as an interest area for their Maine trip)



Acadia National Park was the most visited attraction among day visitors, followed by Cadillac Mountain.

% VISITING

Top destinations		Less popular destinations*	
61%	Acadia National Park	9%	St. Croix Island Int. Historic Site
42%	Cadillac Mountain	7%	Maine Beer Trail
29%	Mount Desert Island	7%	Roosevelt Campobello Int. Park
12%	Penobscot Narrows Bridge & Obs.	6%	Roque Bluffs State Park
12%	Passamaquoddy Bay	5%	Cutler Coast Public Reserve
11%	Downeast Sunrise Trail	5%	Old Sow Whirlpool
11%	Quoddy Head State Park	5%	Asticou Azalea Garden
10%	Abbe Museum		
10%	Reversing Falls		
10%	Lamoine State Park		
10%	Moosehorn Wildlife Refuge		

* Does not show attractions visited by fewer than 5% of visitors.

(n=250)

Q24: Within the region you visited, what specific towns or cities did you visit? (Please check all that apply)

Red text indicates a significant decrease from the previous year and green text indicates a significant increase from the previous year.

Research Objectives and Instruments

Three distinct online surveys are used to achieve the five primary goals of Maine's visitor tracking research.

Research Objectives:	Survey Instruments		
	National Travel Survey	Overnight Visitor	Day Visitor
Identify Maine's share of the U.S. travel market	✓		
Estimate the number of visitors who come to Maine	✓	✓	✓
Provide a profile of Maine visitors		✓	✓
Estimate the amount of spending generated by tourism in Maine		✓	✓
Determine the Maine traveler's level of satisfaction and view of Maine		✓	✓

DESCRIPTION OF SURVEY INSTRUMENTS

National Travel Survey

- Nationally-representative sample of the U.S. population
- Surveyed bi-weekly

Overnight Visitor

- Sampled from core advertising markets: New England, NJ, NY, PA, MD, DE, DC, and Canada
- Have taken an overnight trip to Maine in the last four weeks
- Surveyed monthly

Day Visitor

- Sampled from Maine and a 100-mile radius of Maine's borders
- Have taken a day trip in Maine greater than 50 miles from home in the last four weeks
- Surveyed monthly

Survey Fielding

- Survey results were collected during calendar year 2018, for travel to Maine occurring from December of 2017 through November of 2018. The numbers of respondents participating in each survey are shown below:

Research Component	2018 Completed Surveys
Overnight Visitor Survey	2,901
Day Visitor Survey	1,756
National Travel Survey	20,579



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