2013 BOLD COAST SCENIC BYWAY VISITOR SURVEY RESULTS

The Maine Office of Tourism (MOT) collects visitor surveys for the Downeast and Acadia tourism region. In 2012, between 5% - 10% of visitors surveyed ventured "beyond Bar Harbor" to the area folks from Washington County proudly call "The Real Downeast," and which is now widely referred to as The Bold Coast Region (*MOT 2012 Downeast-Acadia Regional Report*).

Due to the extreme differences between the visitor experience in Acadia or Bar Harbor and in the Bold Coast area, data collected for the entire Downeast and Acadia region is not reflective of visitation trends further Downeast. This lack of visitor information specific to the Downeast or Bold Coast region inspired a 2013 visitor survey modeled after the MOT visitor survey distributed specifically to Bold Coast region visitors.

Methodology
The Bold Coast/Downeast 2013 visitor survey was placed in at least a dozen locations (including restaurants, lodging places, gift shops, a gallery, a museum, a visitor center, and a winery) in a paper format from late August to mid October (to include the Labor Day and Columbus Day weekends.) The survey was also available online. Links were sent to the four area Chambers of Commerce and Downeast Acadia Regional Tourism for posting on their websites. A few local businesses posted the survey link on their Facebook pages or printed and distributed the survey on their own.

A total of 58 surveys were collected over six weeks. Of these, 41 were completed on paper at the distribution sites, and 17 were filled out online. A total of 24 multiple-choice questions were included in the survey, of which 3 requested written comment. Most questions provided an "other" option with space to write in a comment. Not all paper surveys were completed—nine were completed only on one side, and many survey respondents skipped one or more questions. The most commonly skipped question was that about income (24 of 58 respondents skipped this), followed by those about trip planning and what could improve the next visit.

Observations
Business owners who distributed the survey reported that the most common reason for not completing the survey was that people ran out of time (travel companions were waiting for them!). It is not known how many visitors who took a paper copy with them with the intent to fill it out online later actually filled out the online survey. This information implies that the next survey should either be shorter (although the more information collected the better) or predominantly made available online, with cards given out to customers (at the point of service purchase) that provide a link to the online surveys.

Information Sharing
The results of this survey were shared with the following organizations:

- Downeast and Acadia Regional Tourism

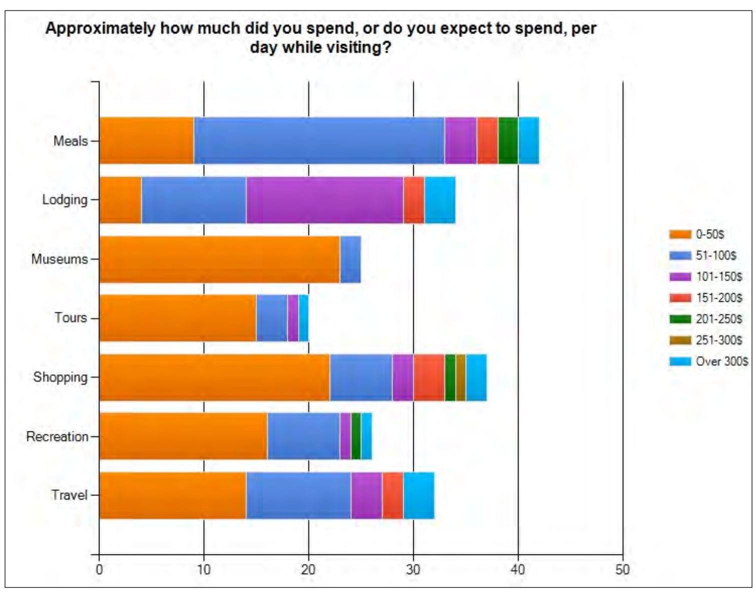
- Sunrise County Economic Council
- Cobscook Bay Area Chamber of Commerce
- Machias Bay Area Chamber of Commerce
- Eastport Area Chamber of Commerce
- Ellsworth Chamber of Commerce
- Milbridge Merchant's Association
- Destination Cherryfield
- Maine Office of Tourism
- Maine Department of Transportation
- Charlotte Coastal Region Tourism Association
- Roosevelt-Campobello International Park.

In addition, this report was posted on the Bold Coast Scenic Byway Facebook page, the Washington County Council of Governments website, and distributed to interested individuals, including the Bold Coast Scenic Byway Corridor Advisory Group. The purpose of this mass distribution is to provide area businesses and economic development or tourism organizations with information for future marketing, business development, or infrastructure planning, as well as to keep them informed and involved in Bold Coast Corridor Management planning activities.

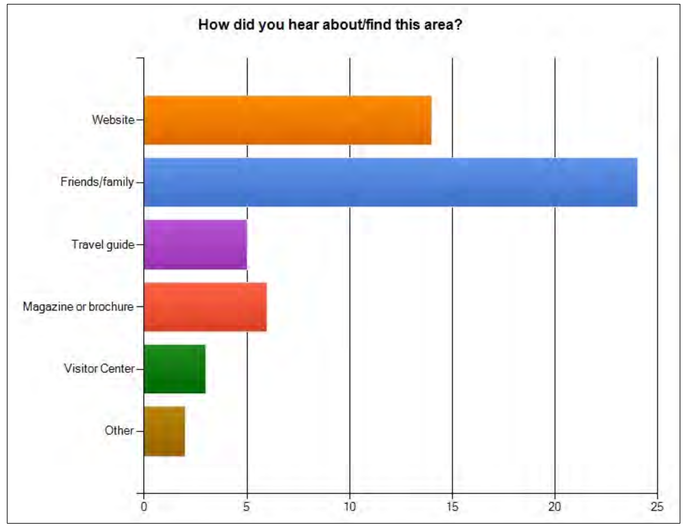
Some data charts and written comments are included in the discussion below. Complete survey results are available as an appendix in the *Bold Coast Scenic Byway Corridor Management Plan*.

Age, Income, Spending, and Origins

The majority of respondents (20) were between 60-69 years old, closely followed by those between 50-59 (14), and then those between 40-49 (7). Most respondents did not answer the income bracket question. Of those that did, all had incomes above \$51,000/year (8 between \$76-100,000, 6 between \$51-75,000, 6 between \$101-150,000, 4 between \$151-200,000, and 2 over \$200,000). The majority of travelers (30) classified themselves as couples without children, followed by those traveling with friends or family.



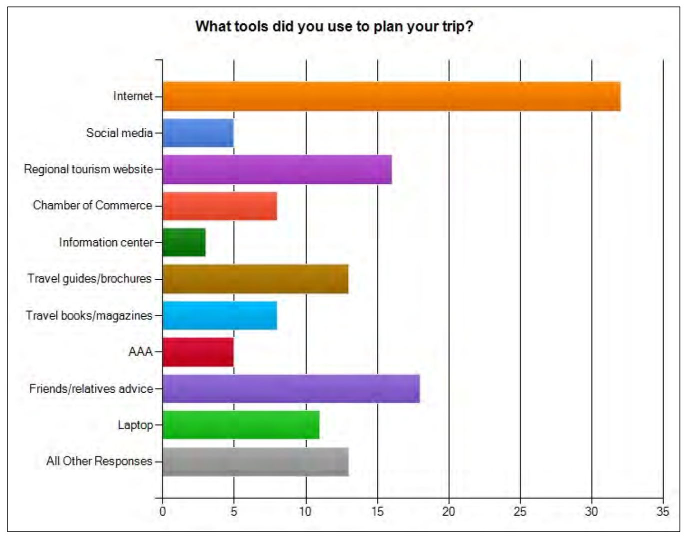
Of those who responded to the question about approximate dollar amounts spent on certain activities during their visit, the majority spent their money on meals, lodging, and shopping. Most lodging was reported to be in the \$101-\$150 per night range, and most meals were reported to be within the $51-$100 range per day. Most respondents reported spending less than $50 per day on shopping, museums, recreation, tours, and travel.



Home zip codes were provided by 47 survey respondents. A map of the locations of survey respondents is included at the end of this report. Respondents were mainly from the east coast, but were generally spread out across the country.

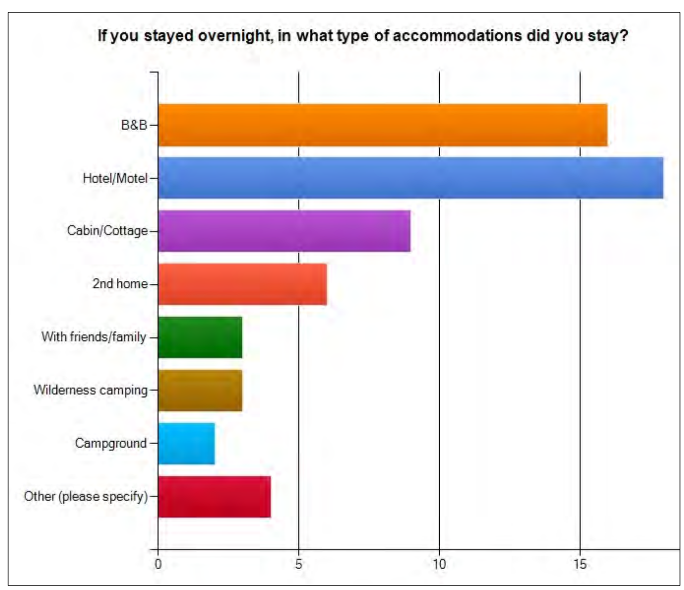
Trip Planning

The majority of survey respondents reported learning about the Bold Coast region through friends and family (24), followed by "through a website" (14). Slightly less than half (27) planned their trip prior to traveling.



Most (32 respondents) used the Internet to plan their trip, while 18 followed the advice of family and friends, 16 used regional tourism websites, 13 used travel guides or brochures, and 8 used Chambers of Commerce.

Survey respondents reported that 41 of them had visited the region before, but only a little more than half (31) reported that they knew much about the area before they came. Of those who did not know much about the area prior to visiting, only 1 reported that they were "sort of glad" that they had come, and none reported that they were "not glad" they had come.

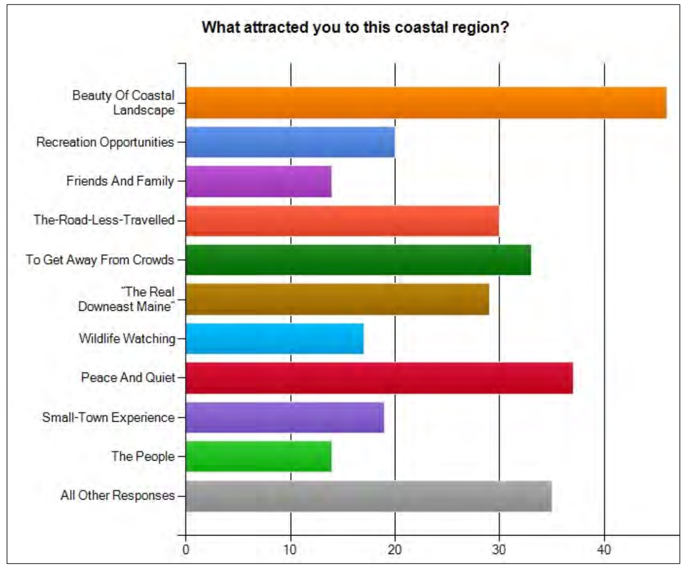


Accommodations and Duration of Stay

Most survey respondents reported staying for 2-3 nights (11 each) or for a week (10). Only 4 respondents reported visiting for only a day. Of those that stayed for at least one night, most stayed in a hotel/motel (18), a bed and breakfast (16), or a cabin/cottage (9). Campgrounds were used by 2 respondents, wilderness camping by 3 respondents, rental houses by 2, summer homes by 7, and friends/family by 3. One respondent reported that they had moved to the region.

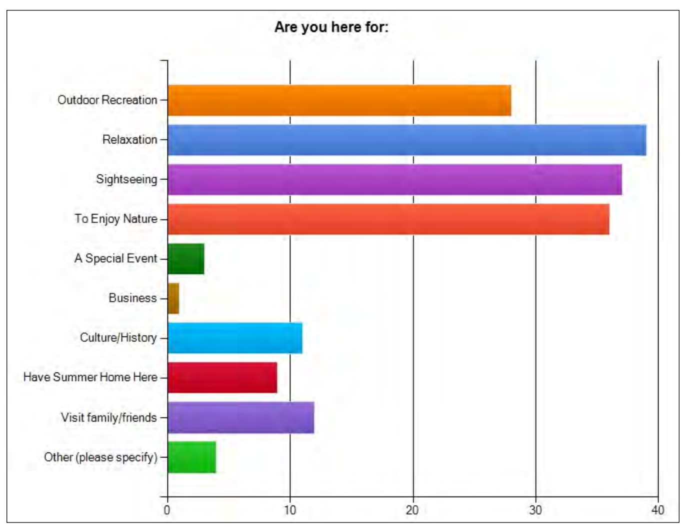
Attraction to the Region

The majority of respondents (46) reported the beauty of the coastal landscape as the primary attraction to the region, followed by the peace and quiet (37 respondents), the ability to get away from crowds (33), the road-less-traveled (30), and the "real Downeast Maine (29)." Reasons written into the "other" line included Summer Keys, friends, and the non-commercial and rustic aspects of the region. Recreation opportunities (20 respondents), small-town experience (19), and wildlife watching (17) were also important attractants to the region.



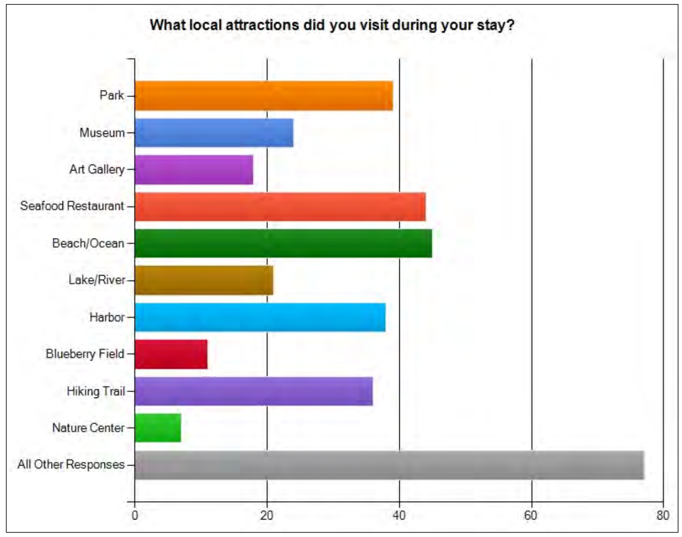
Purpose of Visit

Relaxation was the number one purpose of visiting the region (39 respondents), followed closely by sightseeing (37) enjoying nature (36), and outdoor recreation (28). Family and friends were one of the purposes ofof visiting for 12 respondents, and culture/history for 11 respondents. Written responses included a windjammer cruise and a close getaway for a Bar Harbor resident.

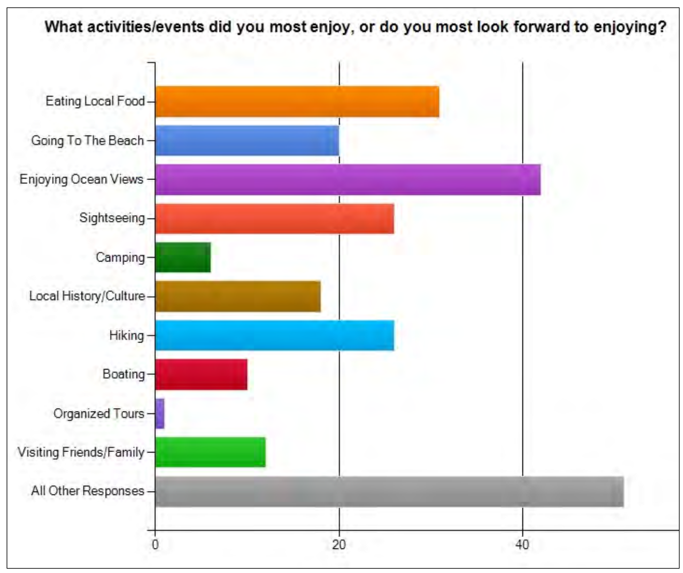


Attractions Most Visited or Desired to Visit

Visitors predominantly reported visiting the beach/ocean (45 respondents) and seafood restaurants (44) during their visit. Other important attractions visited included parks (39), harbors (38), hiking trails and downtowns (36 each), and gift stores (29). Nature centers (7 respondents), blueberry fields (11), art galleries (18), and lakes/rivers (21) were the least visited attractions. Written responses included Campobello Island (3), a lobster pound, winery, lighthouse, and a dairy farm.



Respondents reported that on a return visit they would generally like to visit the same attractions on this trip. However, those attractions that were not highly utilized on this visit (nature centers, blueberry fields, art galleries, and lakes/rivers) were given more weight as being of interest for a future visit, with lakes/rivers (26) and nature centers (21) being the most desired of these as a new experience. Written responses to this question included Campobello Island, a lobster pound, a lobster boat trip, and a dairy farm. Several respondents simply said that next time they would like to visit "all" attractions.



Activities Most Enjoyed
Visitors most enjoyed ocean views (42), eating local food (31), sightseeing and hiking (26 each). Organized tours were the least utilized activity (1 respondent), followed by camping (6) and boating (10). Written responses included photography, fishing, whale watching, and wine tasting.

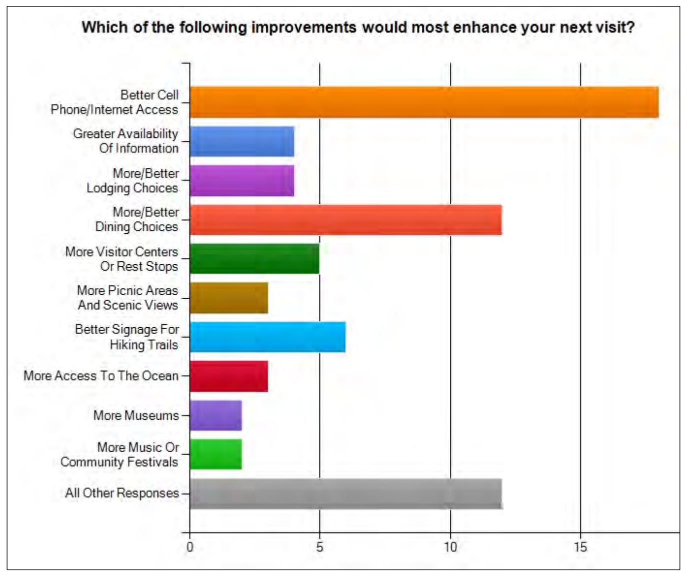
Likelihood of Returning or Recommending the Area
Respondents were asked how likely, on a scale of 1 to 10 (with 10 being the highest), were they to recommend a Bold Coast visit to a friend or relative. Of the 57 who responded, 46 responded with a rating of 10, 2 responded with a rating of 5 and 1 responded with a rating of 1. The lower ratings were explained with written comments such as "too rugged for some," "there isn't much to do," and "sad to see so much decline". Those who gave it a high rating generally referenced beauty, scenery, pristine nature, quiet, and lack of crowds.

Respondents were also asked how likely, on a scale of 1 to 10 (with 10 being the highest), how likely they themselves were to return to the Bold Coast region. Of the 56 who answered, 36 gave a rating of 10, 2 gave a rating of 5, and none gave a lower rating. Written responses again referenced beauty, quiet, and tranquility. Challenges to returning included lack of time (too many places in the world to see!), family members no longer being in the area, and expensive plane tickets.

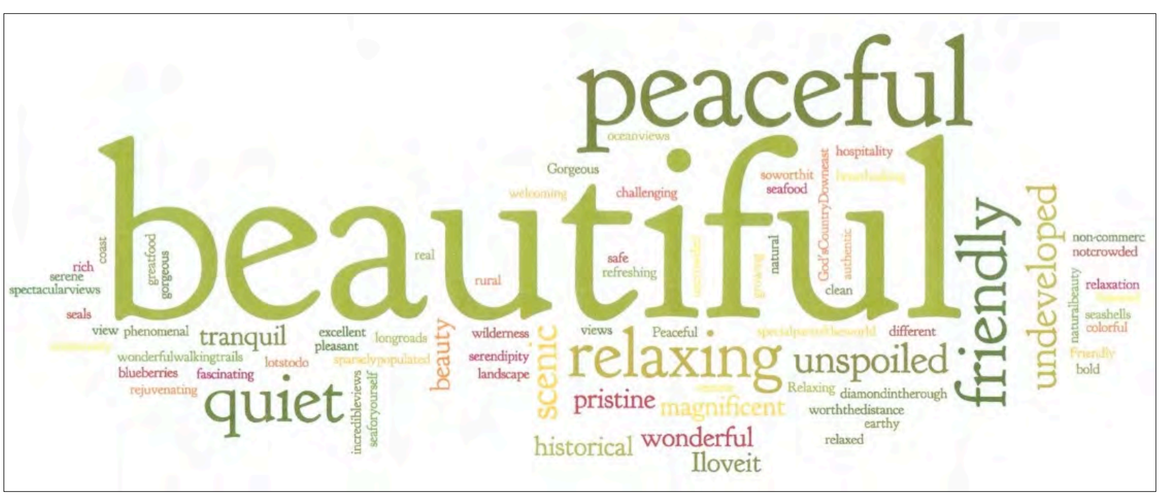
The most popular season for a return visit is September/October (49 respondents) followed by June-August (33 respondents). November through May were checked as desirable times to return by 5 respondents.

What Improvements Would Most Enhance the Next Visit?

The most desired improvement is better cell phone or Internet access—lack of cell access was noted as particularly difficult. Other desired improvements are more or better dining choices, signage for hiking trails, and visitor centers or rest stops. The least requested improvements were museums and music or community festivals. Three survey respondents desire no changes at all, two (each) desire better shopping for everyday purchases, better information on boat launch sites, a paved bike trail, a revival of downtown Lubec, and bathrooms.



What Words Describe Your Experience in the Bold Coast Region?
Respondents provided three words to describe the region or their experience in the region. The words provided by 51 respondents are collected and shown below as a "word cloud"—the boldest, largest words are those that were most commonly used by visitors.



Summary and Conclusions

Considering that at least half of the surveys were completed after Labor Day Weekend, the demographic information (and potentially other results) are not necessarily reflective of the entire Bold Coast region visitor profile. Certain aspects that are most certainly skewed by the timing are age, income, and type of traveler (predominantly reported as couples without children). What may not be as specific to the timing are results depicting interests, activities, experiences, trip planning, and spending. So, with this in mind:

Visitors to the Bold Coast region (at the tail end of the summer) tend to be over 50 and traveling as couples. Most visitors are attracted to the region for its beauty, peace and quiet and getting away from crowds, with relaxation, sightseeing, and enjoying nature as their main purposes in visiting. When asked to describe the region or their experience here, the words visitors most used were beautiful, peaceful, relaxing, quiet, and friendly.

Visitors tended to be in the $50-$100 thousand income range, and reported spending $101-$150 per night on lodging (mostly hotels/motels and B&Bs) and $50-$100 per day on dining. Interestingly, shopping tended to be reported as a low daily expense.

Most respondents had been to the area before, and were connected to the area through friends and family. Most used the Internet and the advice of friends and family for trip planning, which was nearly equally done before and during travel.

Respondents predominantly visited the beach/ocean, seafood restaurants, and parks, underscoring the interest in sightseeing and nature. Respondents reported most enjoying ocean views and eating local food. Overwhelmingly, visitors would return or recommend a trip to a friend or family member. Most people would prefer to return in September/October (again a likely reflection of the survey timing and resulting visitor profile.) Improvements that would most enhance the next visit were better cell phone/internet access, and more/better dining choices.

Given these results, the Bold Coast region traveler (at least those visiting in late summer and early fall) seems to fit the general Maine visitor profile—repeat visitors with connections to friends and family who are seeking beauty, relaxation, and enjoyment of nature along the coast. The Bold Coast region visitor profile revealed through this survey exemplifies the “experiential” or “heritage” traveler. These travelers seek unique experiences and products in an authentic community and personal interaction with local people. These travelers want relaxing, rejuvenating, and reconnecting experiences and the quiet, simple beauty of coastal landscapes. They will tend to stay longer and spend more money, and, because they tend to become more personally connected to a place, they often become stewards or spokespeople for a region.

2013 Bold Coast/Downeast Survey Respondent Home Regions

December 3, 2013: Washington County Council of Governments

Bold Coast Scenic Byway Business Owner Survey—2014

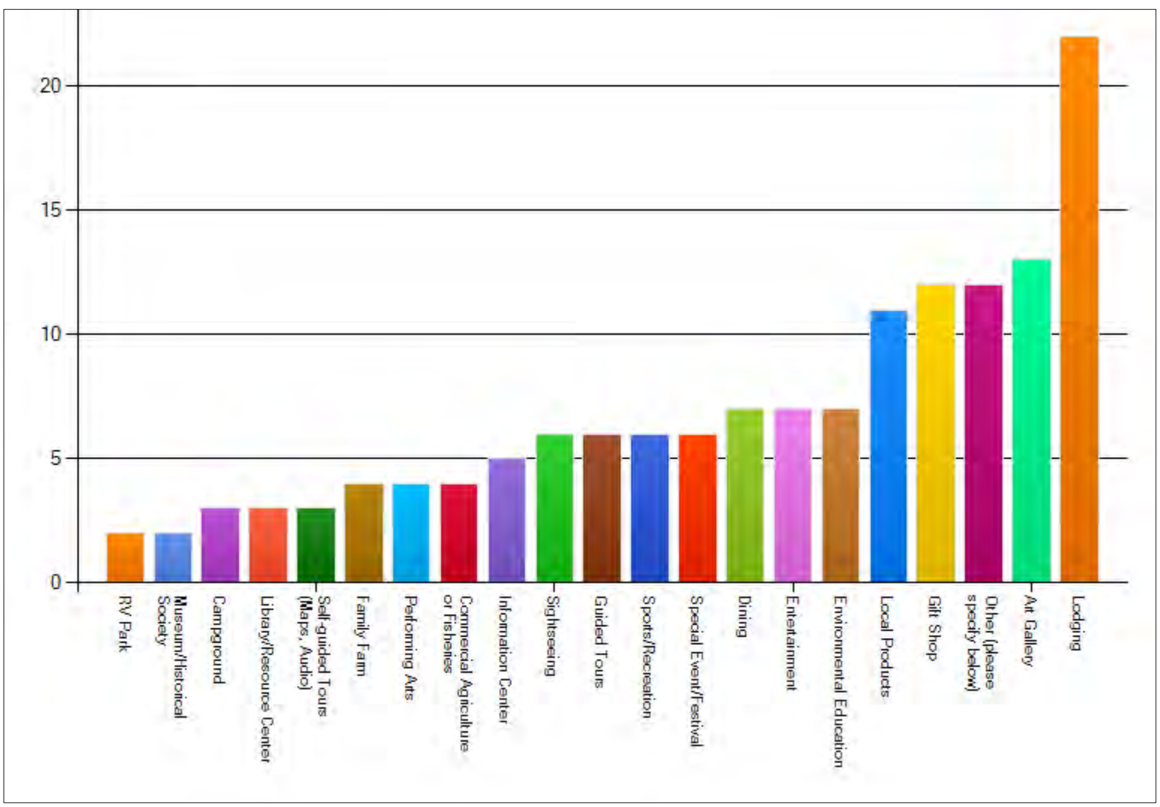
Purpose and Methods

During the month of January 2014, Business owners along the Bold Coast Scenic Byway corridor were asked to respond to an on-line survey about their businesses. Utilizing Chamber of Commerce business member lists, Bold Coast Scenic Byway stakeholder lists, and local knowledge, over 220 links to the online survey were emailed (or sent by US mail to those whose emails were not readily available). A total of 60 business owners (for a return rate of approximately 27%) provided information about their business characteristics, seasons, assets, promotion/marketing methods, plans for business expansion and any assistance needed.

This information will direct the Bold Coast Scenic Byway marketing plan. The marketing plan will support and promote the businesses and organizations of the Bold Coast region while also celebrating and preserving the regional culture and environment.

Business Types Represented

A variety of business types are represented in survey responses. The majority of respondents characterize their businesses as lodging (41%), followed by art galleries (24%), gift shops 22%), and suppliers of local products (22%). Other well-represented businesses include dining, entertainment, and environmental-education (13%); sightseeing, guided tours, sports/recreation, and special events (11%); information centers (9%); and commercial agriculture or fisheries and family farms (7%).



Other business categories represented include campgrounds, library/resource centers, self-guided tours, RV parks, and museum/historical societies. Other business types described in written comments include an artist/fabric designer; an event/conference facility; a historic site; wildlife information center; boat charters; a "music vacation"; bakeries; a winery; medical/alternative healing; and a shellfish hatchery/marine education center.

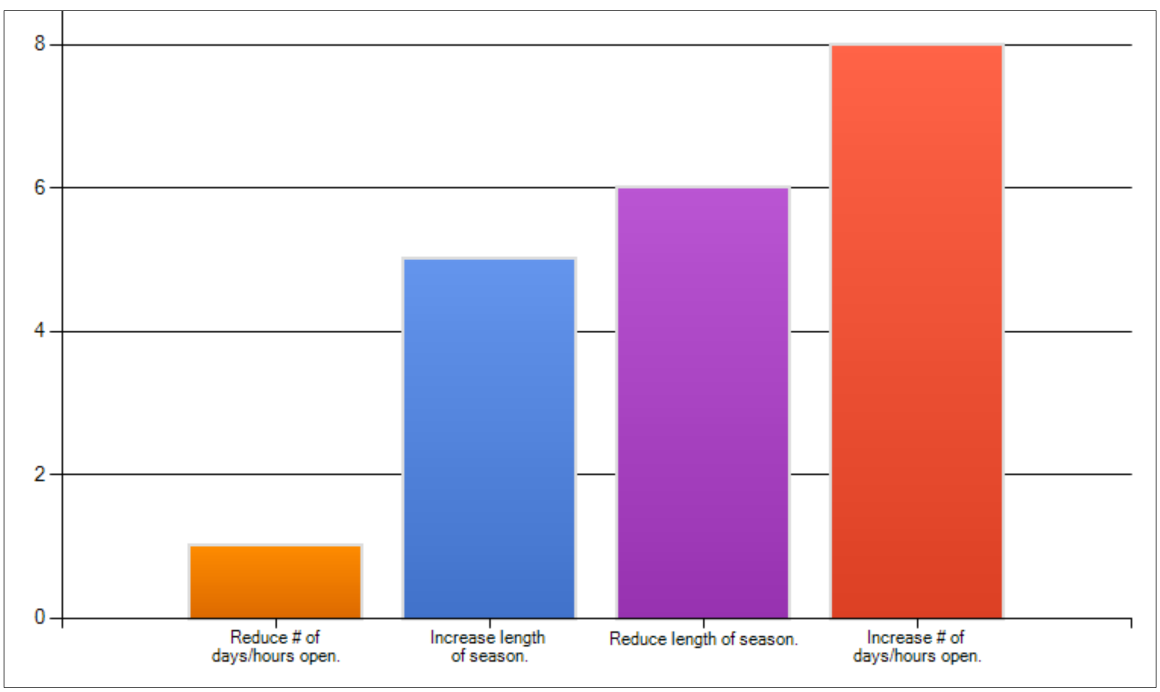
Internet

51.7% of respondents offer wireless internet for their customers, while 6.9% are "working on it". Respondents commented that a poor signal was problematic, that other businesses or the general public were tapping into their Wi-Fi, or that they offered their customers "rejuvenation away from the rest of the world" by not providing Wi-Fi.

Open Season

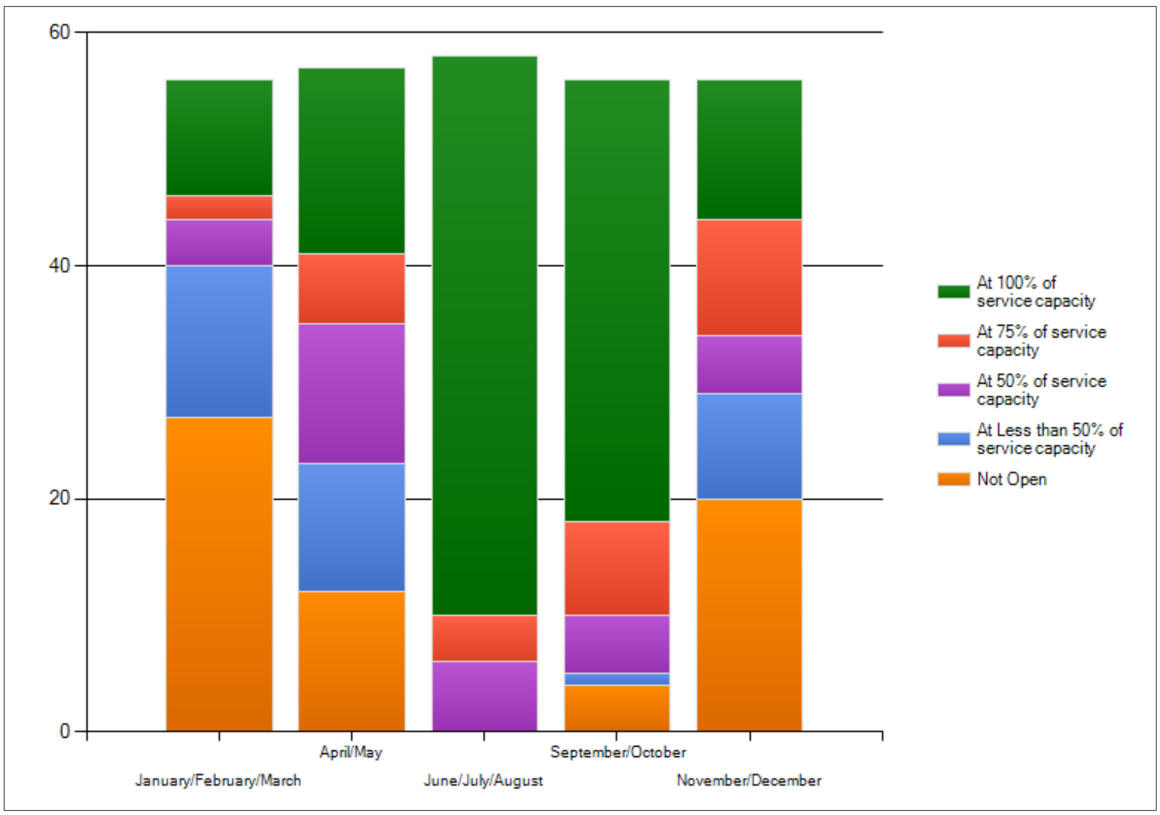
The number of respondents offering year-round as opposed to seasonal services is exactly the same (50%). Most respondents report that their businesses are open every day during their season. The most common day that businesses are not open is Monday.

Approximately 44% of survey respondents would like to increase the number of days or hours they are open, and approximately 28% would like to increase their length of season. Simultaneously, 33% of respondents would like to reduce the length of their season and about 5% would like to reduce their days/hours open. Written comments point to a lack of customers during the "shoulder" months as cause for the desired reductions.



Business Capacity
Survey respondents were asked to determine the months of the year during which their businesses were at their capacity. Most respondents (83%) report that their businesses were at 100% capacity during the months of June/July/August, and more than half (68%) also report being at 100% capacity during September/October. About 28% of respondents report being at 100% capacity during April/May.

September-December provides a strong shoulder season of 75% capacity for about 29% of respondents. April/May provides a moderate shoulder season of 50% capacity for about 21% of respondents. January-May provides less than 50% of business capacity for just under half of respondents. Nearly half of respondents report that their businesses are closed from January-March, and about 1/3 report that their businesses are closed during November/December.



MARKETING METHODS

Advertising Methods and Effectiveness

The three advertising methods *most commonly used* by survey respondents are business websites (32%); local Chambers of Commerce (31%); and local business display racks (27.5%). Other methods more commonly used are local events (20%), travel guides/brochures (19%); and Facebook (19%).

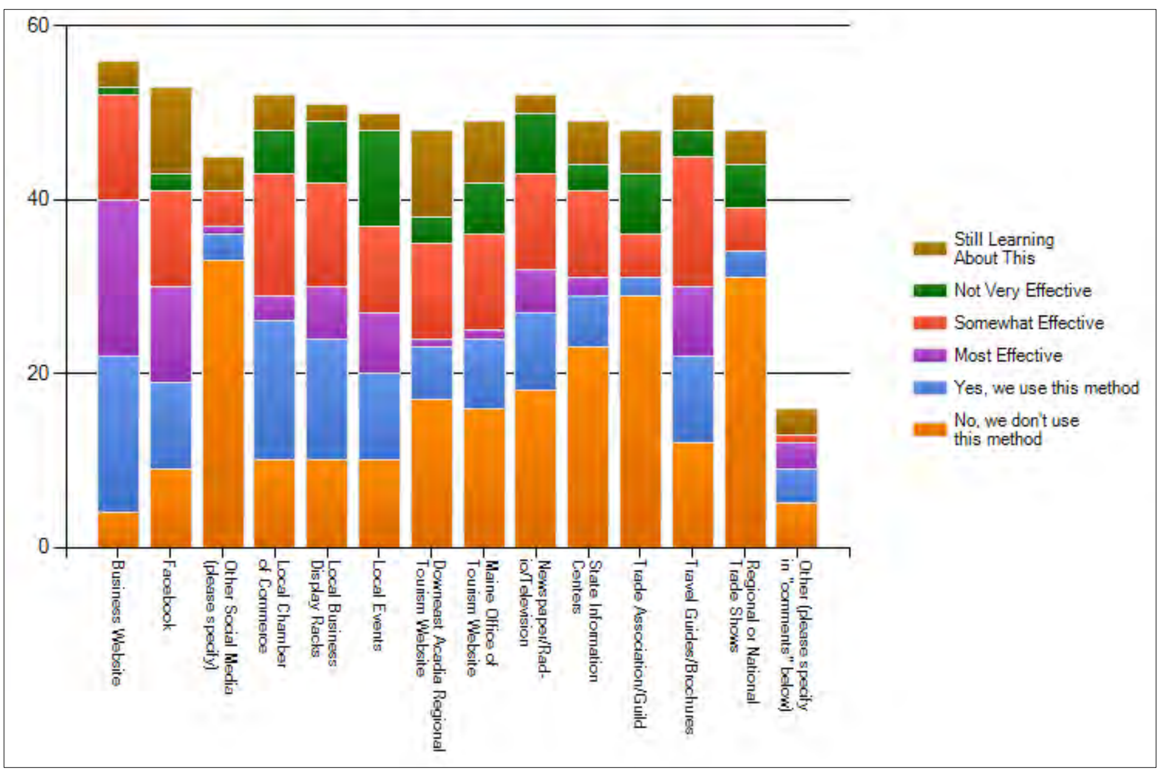
The *least commonly used* advertising methods include other social media (besides Facebook), regional or national trade shows, trade associations/guilds, state information centers, and newspaper/radio/television. Downeast/Acadia Regional Tourism website is NOT used by 35% of respondents, and the Maine Office of Tourism website is NOT used by 33% of survey respondents.

The ***most effective*** advertising methods reported by survey respondents are their own **business websites** (32%), followed by **Facebook** (21%), and **word of mouth** (21%)(including online methods such as Trip Advisor and Twitter).

Advertising methods reported as being only *somewhat effective* include travel guides/brochures (29%), Facebook (21%), local Chambers of Commerce (27%), local business display racks (23.5%), the Downeast Acadia Regional Tourism website (23%), and the Maine Office of Tourism website (22%).

Advertising methods reported as being the *least effective* include local events (22%), trade associations/guilds (14.5%), local business display racks (14%) and newspaper/radio/television (13.5%).

The effectiveness of Facebook as an advertising tool is still being learned about by approximately 19% of respondents.

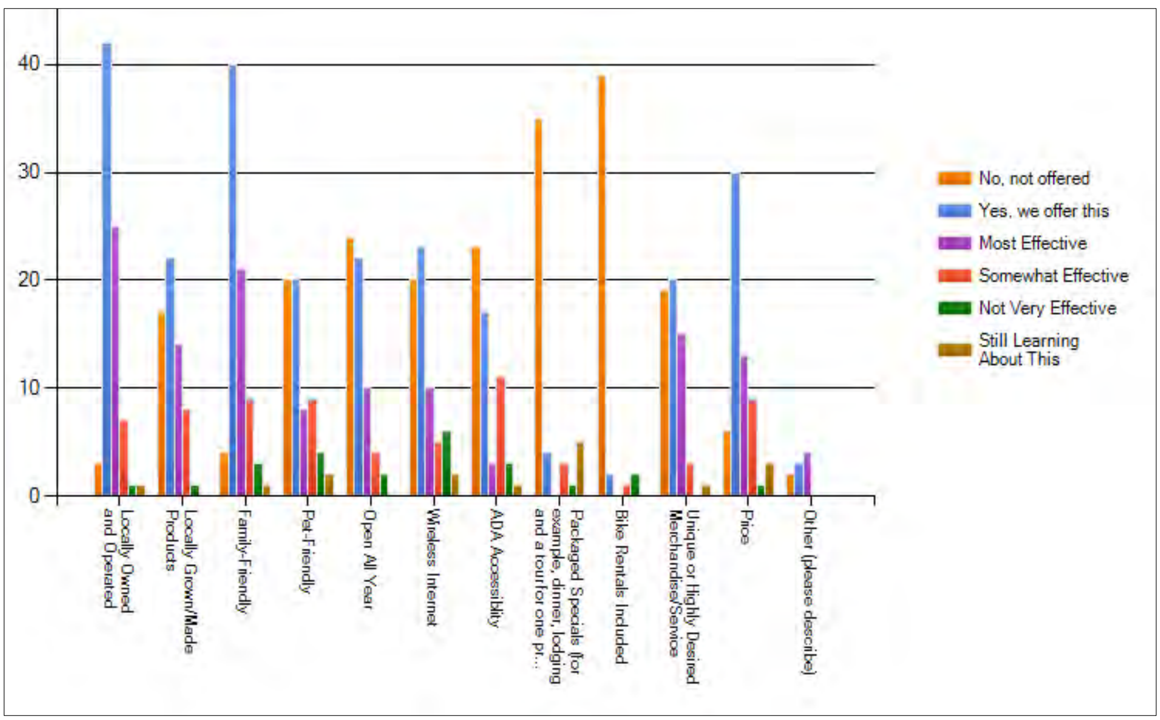


Business Services, Products, and Assets
Survey respondents report the following as being assets, services or products that their businesses offer and promote: locally owned/operated (78%); family-friendly (75.5%); price (68%); wireless internet (48%); locally grown/made products (48%); pet-friendly (43.5%); unique/highly desired merchandise/services (43.5%); and open all year (42%). Written comments include customer service, free kayaks, great wildlife photography, wine tours, trolley tours, farm tours, and guided tours.

Services, products, and assets *NOT offered* include packaged specials (81%), ADA accessibility (51%), being open all year (46%), pet friendly 43.5%), unique/ highly desired merchandise (41%), and locally grown/made products (37%).

Assets, products, and services reported as being ***most effective*** in promotion include: **locally owned and operated** (46%); **family friendly** (40%); **unique or highly desired merchandise** (32%); **locally grown/made products** (30%); and **price** (29.5%).

Those assets, products, and services reported as being *somewhat effective* in business promotion include ADA accessibility (24%), price (20%), and pet-friendliness (20%). Least effective promotional services, products, and assets include wireless internet (12.5%). Packaged specials were reported by 12% of survey respondents as being a promotional method they are still learning about.

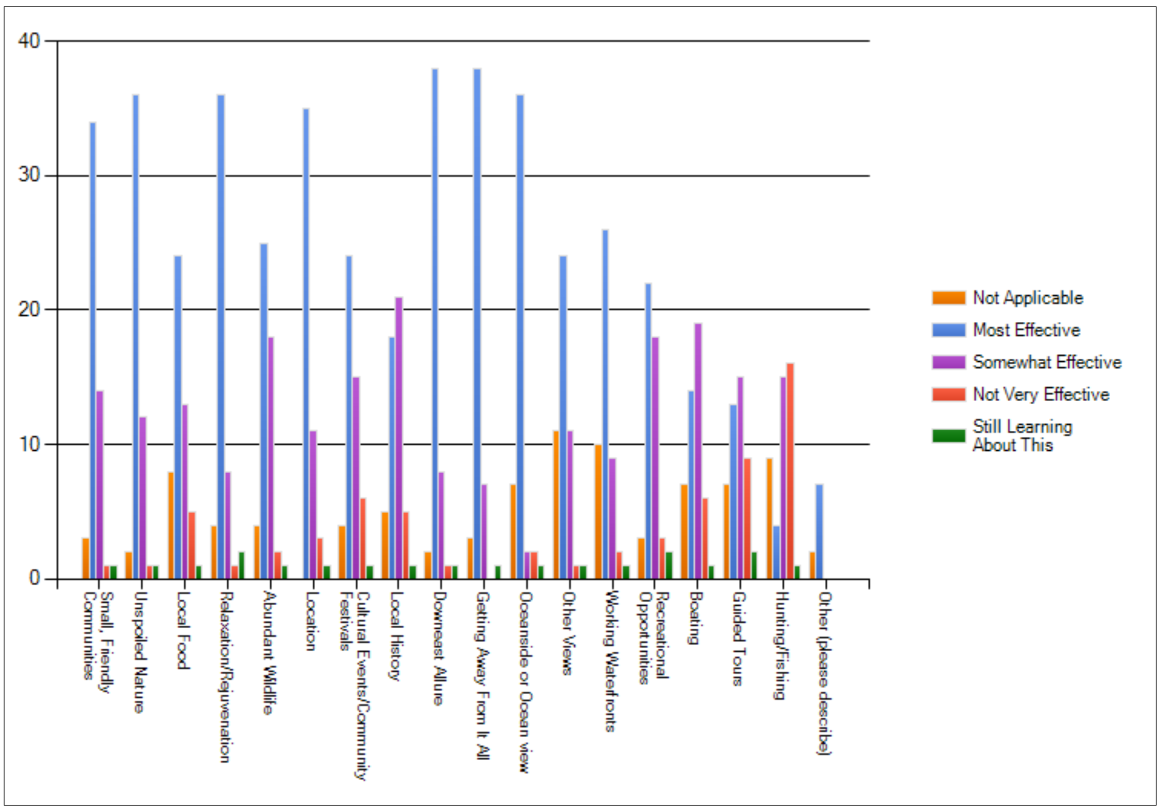


Desirable Regional Qualities
Survey respondents were asked to rate the qualities of the region they find ***most effective*** as a business promotion tool. These include **getting away from it all** (78%); **downeast allure** (76%); **ocean side/ocean views** (75%); **relaxation/rejuvenation** (71%); **location** (70%); **unspoiled nature** (69%); **small, friendly communities** (64%); and **working waterfronts** (54%).

Other *most effective* promotional qualities include **abundant wildlife** (50%); **views other than water views** (50%); **cultural events/community festivals** (48%); **local food** (47%); and **recreational opportunities** (46%).

Somewhat effective regional qualities as promotional tools include local history (42%), boating (40%), recreational opportunities (37.5%), abundant wildlife (36%), hunting/fishing (33%), guided tours (33%), and cultural/community events (30%).

Regional assets proving *least effective* as a promotional tool include hunting/fishing (36%), and guided tours (20%).



FAM Tours
Respondents generally (51%) would like more information prior to considering sponsoring a travel writer or a familiarization (FAM) tour hosted by the Maine Office of Tourism. Only 7% of respondents said they would NOT consider such a tour, while 42% of survey respondents said they would consider it.

BUSINESS EXPANSION

Visitor Readiness

Survey respondents overwhelmingly (85.5%) feel their business is “visitor ready” for the amount, type, and demands of their clients. Only 4% felt they were not “visitor ready” and 11% reported that they were “getting there.”

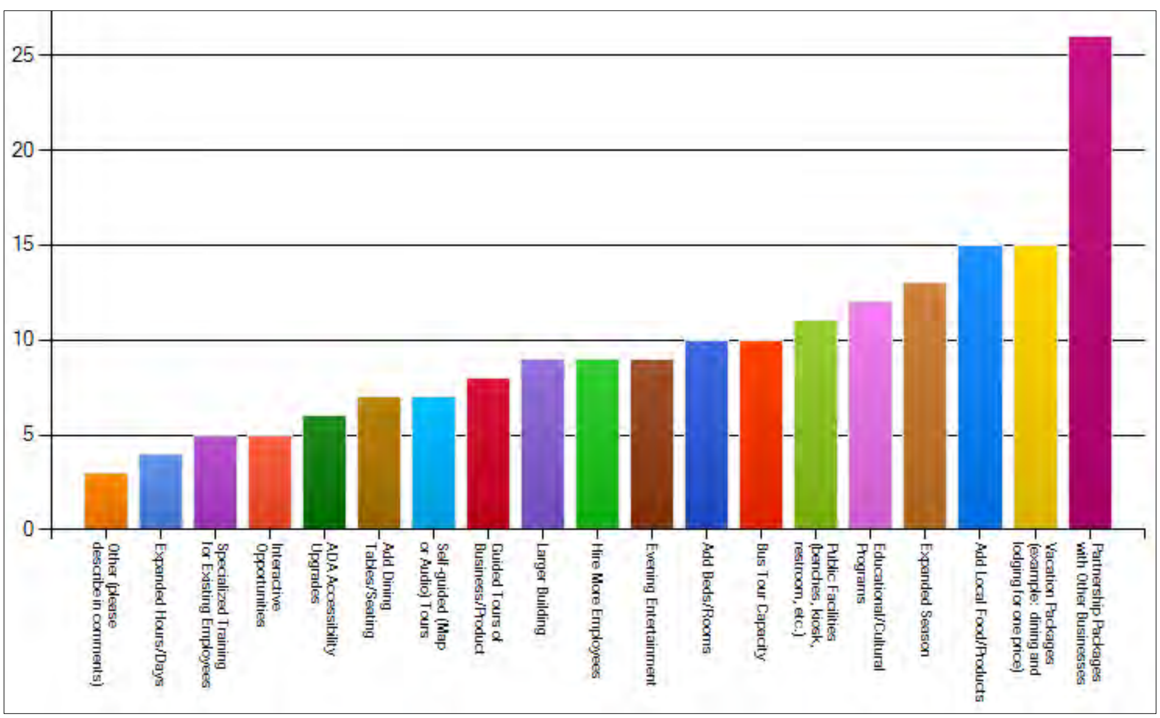
Expansion of Services Offered

The most common way in which survey respondents would like to expand their businesses to offer more, better, or different services includes offering partnership packages with other businesses (58%). Other business expansion desires include adding local food/local products (33%), offering vacation packages at one price (33%), expanding the season (29%), providing educational/cultural programs (27%), adding beds/rooms (22%), and bus tour capacity (22%).

The least desired business expansions include expanded hours/days (9%), specialized training for existing employees (11%), and interactive opportunities (11%). Written comments include bus tours, caterers, a public restroom/visitor center in Eastport, and signage in Machias.

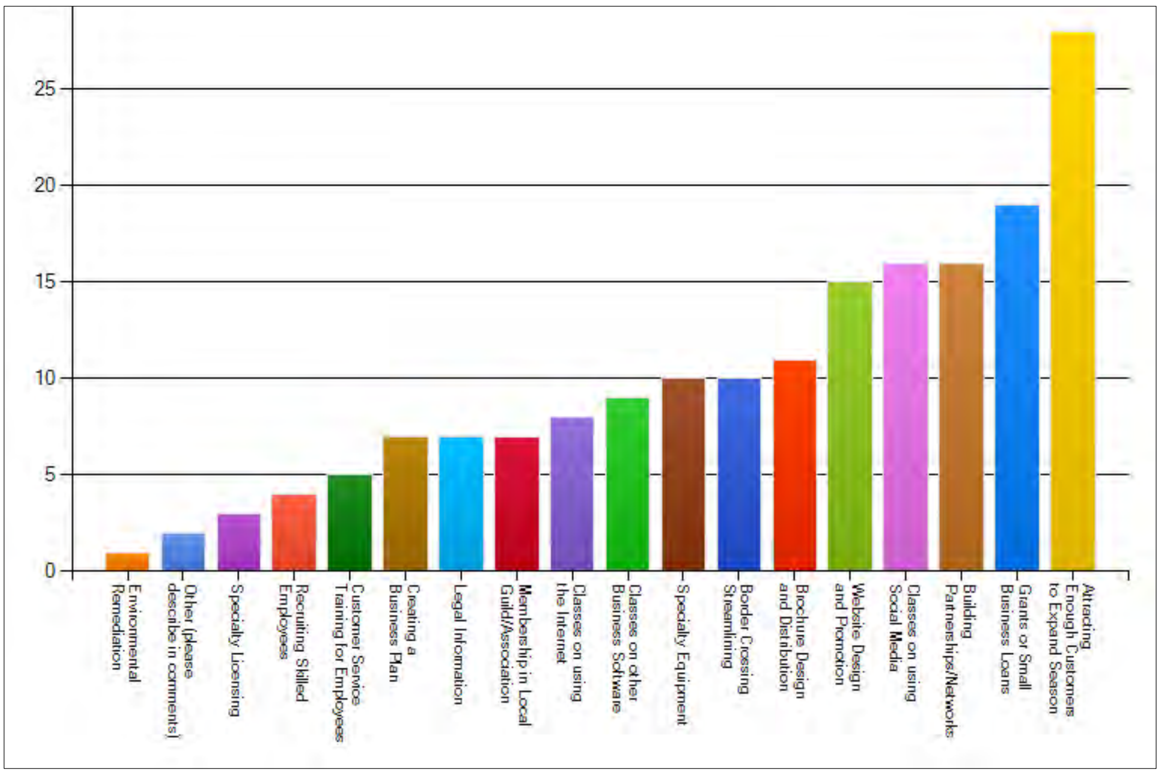
Assistance Needed for Growth

Survey respondents were asked what types of technical, financial, partnership, or training assistance they need in order to achieve their desired expansion of services. The most common response (65%) was attraction of enough customers to expand the season.



The second most needed form of assistance is grants and small business loans (44%), followed by building partnerships/networks (37%), classes on using social media (37%), website design and promotion (35%), and brochure design and distribution (26%), specialty equipment (23%), and streamlining border crossings (23%). Written comments include recruiting skilled volunteers and public wharf improvements for both the public and for fishermen. One respondent mentioned time to attend classes as being an issue.

The least needed forms of assistance include environmental remediation (2%), specialty licensing (7%), and recruiting skilled employees (9%).



Conclusions

A number of important marketing and promotion considerations are made clear through this survey of business owners.

<u>Being open for business</u>: Mondays are the most common days that businesses report not being open. Approximately 44% of survey respondents would like to increase the number of days or hours that they are open. If more businesses expand their open days to include Mondays, visitors could more consistently access the opportunities they came for, resulting in a better experience for visitors and a greater chance for repeat customers and positive reviews.

Expanding the shoulder seasons: Approximately 28% of survey respondents want to expand the length of their seasons. Most businesses are operating between 75% and 100% of their capacity between June and October. November/December and April/May are already good shoulder seasons for many businesses, which report operating at between 50% and 100% of their capacity.

A focus on expansion and promotion of activities and services available in April/May and November/December is necessary to maximize on existing shoulder seasons, and boost the region's reputation for being a destination during these months.

Advertising Effectiveness: Local events and Facebook pages are advertising methods that may be underutilized among survey respondents, who consider them to be less effective than other marketing methods. Approximately 21% of all respondents said Facebook is a **most** effective marketing tool while 19% are still learning about it. Local business display racks and local events were reported as being the least effective marketing methods by 22% of users. Individual business websites are considered by survey respondents to be the most effective tool.

Marketing research should strive to understand how to make information display racks and local events more effective marketing tools for Byway businesses. Business training opportunities in effective online advertising, including website design, product promotion, and Facebook use should continue, with an eye toward future trends. A focus should be put on creating a Bold Coast regional website portal where visitors can easily access Chambers of Commerce and similar destination websites.

Business Services, Products, and Assets: The assets, services, and products most effectively utilized in promotion include locally owned/operated, family-friendly, unique or highly desired merchandise, locally grown/made products, and good price, in that order of importance to visitors. These aspects of regional products, services, and experiences should be supported and enhanced.

Packaged specials are NOT offered by 81% of businesses, while another 12% are still learning about this—economic development efforts focused on supporting and encouraging these partnerships should continue and increase.

ADA accessibility is NOT an option in 51% of businesses, while, 24% of businesses reported that this was a somewhat effective marketing tool. Support should be given as much as possible to businesses striving to increase ADA accessibility of their businesses.

Desirable Regional Qualities: Among the list of the most desired qualities in the region, preservation and enhancement of working waterfronts will benefit our commercial fisheries, the business owners who depend on fisheries, and the visitors who want to experience this rare and valuable way of life. Maintaining a positive relationship between fisheries and tourism is critical to the success of our entire region.

Those assets most desirable to visitors include natural resources and the quality of life found here. Efforts to preserve and promote these should continue. Hunting and fishing is not reported as a strong visitor asset, although it is known to be a strong asset for residents. This provides an opportunity to utilize local experts and Maine Guides to help visitors access hunting and fishing opportunities. Increased attention should be given to marketing cultural events/community festivals, local culinary experiences, and guided tours.

Visitor Readiness: Most survey respondents feel their businesses are "visitor ready", which allows more intensive marketing and promotion of the region to begin! More effort should now go into encouraging business to partner up and package their ready-and-waiting services and products in order to make trip planning and traveling more visitor friendly. Themed itineraries and itineraries based on amount of time in the area will help visitors learn where to go and what to do when they get here. Area information, itineraries, and regional maps should be easily accessible to visitors once they arrive.

Expansion of Services: The most common business expansion desired are partnering and packaging services with other businesses, adding local foods/local products, and providing educational/cultural programs. Again, regional trainings, networking, and other support should be offered to help businesses achieve this.

Assistance Needed for Growth: Attraction of enough customers to expand the season is needed in order for many businesses to expand. Marketing and promotion efforts should strive to promote any available opportunities for April/May and November/December, and communities, individuals, and businesses should be encouraged to create new shoulder season opportunities.

Grants and small business loans for business expansion are needed, along with building partnerships and networks. This is a prime opportunity for greater community collaboration around collective visions and goals. Organizations involved in cultural/heritage/recreation/resource preservation should find more ways to create public/private partnerships with members of the business community.

Online classes would help those who need to improve their skills in using social media and designing websites but who can't always travel to classes in-person.