Bar Harbor

SITUATIONAL ASSESSMENT ON THE STATE OF TRAVEL AND TOURISM

JAN, 2026

Foreword

Bar Harbor - Situational Assessment

This analysis gives a clear, data-backed picture of how tourism affects Bar Harbor's economy. Instead of relying on guesswork or general impressions, we pulled together several sources of real data — including foot traffic from mobile devices, sales tax records, business licenses, short-term rental registrations, and employment figures — to get a well-rounded view of what's actually happening.

Rather than treating "tourism pressure" as one big, vague problem, this approach breaks it down into specifics: which areas of Town get the most crowded, which businesses see the most unpredictable revenue, how seasonal work affects the local workforce, and how much housing is being shifted toward visitor use.

This analysis aims to provide Bar Harbor with the data needed not just treat the symptoms, but understand the underlying causes, and make decisions grounded in real evidence.

About Equator

Equator is a travel data and analytics company powered by AI and proprietary statistical models, focused on helping destinations understand and manage the real pressures created by tourism. This situational assessment for the Bar Harbor Sustainable Tourism Task Force was authored by Equator, with support from JE Austin, and was developed using a multi-layered evidence base that combines mobile phone data to analyze footfall and movement patterns, local infrastructure and housing data from the Town of Bar Harbor, parks and land-use information, taxable sales records, and accommodation occupancy models.

Rather than relying on a single dataset or proxy, the report integrates multiple systems and analytical approaches to build a grounded picture of seasonality, spatial concentration, economic dependence, and capacity constraints—translating fragmented data into a clear, decision-ready baseline for sustainable tourism planning.

Data limitations disclaimer: All findings are directional rather than definitive. The data sources used have inherent limitations (especially in a small, seasonal destination like Bar Harbor) and should be read alongside local knowledge and ongoing monitoring.

Summary Findings

Bar Harbor - Situational Assessment

Bar Harbor is a classic gateway town: small, scenic, and economically powered by access to a world-class natural asset in Acadia National Park. For the most part, the town is well positioned to deliver extraordinary value for both local residents and visitors. The challenge however, is in managing the risks associated with continued, unchecked growth.

This situational analysis provides a comprehensive, data-driven portrait of Bar Harbor's visitor economy, synthesizing anonymized footfall data, taxable sales records, business licensing databases, short-term rental registrations, and employment figures to establish a shared factual foundation for strategic decision-making. The analysis reveals a visitor economy defined by three structural realities: concentration, compression, and constraints.

Bar Harbor does not experience tourism uniformly

Pressure is highly concentrated in space. Footfall data shows the Waterfront is the primary bottleneck, absorbing roughly 2.5x the volume of any other monitored zone and peaking at 21,157 visits on July 4, 2025. With only ~5,300 residents, peak days can place crowding equivalent to three times the town's population into a 750-foot radius. The localized "block-by-block" view confirms that Bar Harbor does not experience tourism uniformly: West Street and the Village Green/Rodick Street area function as high-intensity staging and transit pinch points, while Cottage Street is the resilient year-round commercial spine where visitor and resident life overlap most consistently.

The town's economy is compressed into a short season

Taxable sales data show a tourism-driven economy that is materially wealthier than non-tourism baseline towns, but narrowly based: lodging and restaurants account for roughly two-thirds of taxable sales, and 84.8% of all taxable sales occur between May and October, with over half of annual revenue arriving in June–August. Lodging is the most volatile and economically consequential sector; August lodging sales revenue is ~116x February. This revenue compression makes the system profitable in summer but fragile in winter—creating a structural challenge for year-round business viability, municipal stability, and local quality of life.

The town faces hard constraints in workforce, essential services, and housing

Carrying-capacity indicators suggest Bar Harbor's commercial landscape increasingly serves peak-season visitors rather than resident needs. Per capita, the town has 2.4x more tourism businesses than comparison towns, but 27% fewer essential services. There are acute gaps in auto mechanics, hardware, trades, and personal care. The labor market mirrors this seasonal logic: employment rises ~72% from winter (Q1) to peak summer (Q3), with nearly half of peak-season jobs seasonal and the summer surge concentrated in accommodation and food services.

These pressures are amplified by housing constraints: Licensed short-term rentals (STRs) have reached critical levels of density relative to housing stock. Roughly one in seven homes (14–15%) functions as a licensed STR, or ~94 STRs per 1,000 residents, far above comparable tourism towns. While ownership is currently fragmented, there is a real, yet possibly narrow policy window for the community to work together before investment groups see the market as an opportunity to consolidate properties under single management groups.

Taken together, these three dynamics – spatial concentration, seasonal compression, and systemic constraints – reveal a town whose economic model has succeeded on its own terms but is now approaching structural limits. Bar Harbor has monetized its proximity to Acadia exceptionally well, generating per-capita taxable sales that dwarf comparable communities. Yet that success has come at a cost: a commercial ecosystem optimized for peak-season visitors rather than year-round residents, a labor market that swells and contracts with the tourist calendar, and a housing stock increasingly diverted toward short-term rental use.

The path forward will require Bar Harbor to do what few gateway towns have managed: retain the economic benefits of tourism while rebuilding the civic and commercial foundations that make year-round community life viable. That means not simply managing visitor volume, but deliberately rebalancing the town's economic geography—dispersing pressure away from the Waterfront, extending viable commerce beyond the summer peak, and reclaiming housing and services for the residents whose presence makes Bar Harbor a place worth visiting in the first place.

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SITUATIONAL ASSESSMENT

Travel & Tourism

From the ‘golden age’ of travel to today

Since 1950, the travel and tourism sector has been growing fast. New levels of globalization, the expansion of trade routes, investments in infrastructure and technology, rising education levels and breakthroughs in healthcare have all contributed to extraordinary demographic and income growth around the world.

The reality of this shift is best illustrated in the income mountain graphic, on page 3. This chart shows the world’s population (the mountain) against per capita income (its shape or displacement along the x axis, which is per capita income). The line at the center of the graphic is the estimated cost of an international vacation, adjusted for inflation. In 1950, the number of people who could afford to travel stood at 2.7 million. In just three generations, that number has risen to well over 650 million today. In other words, there are 250 times more people today who can afford to take a vacation than 75 years ago. This is mirrored in data produced by the United Nations World Travel Organization, who report that arrivals (the number of people crossing international borders) has risen from 25 million in the early 1950s, to well over 1.5 billion in 2024.

This is just the beginning

There are few signs that growth is about to slow anytime soon. According to the World Economic Forum, Gross Domestic Product (GDP) per capita is set to grow at 2.3% per year. For the travel and tourism sector, this rate of growth will result in millions of tourists obtaining enough financial resources to travel for the first time. Based on models generated by Equator, it’s estimated that the total universe of tourists worldwide (essentially the number of people who can afford to take a vacation) will surpass 1 billion people by 2050 (~10% of the world’s population).

It is for these reasons that the vast majority of economists in travel and tourism anticipate strong, steady growth in the number of travelers in the years to come. A joint study by Deloitte and Google, forecasts that visitor arrivals will reach 2.4 billion by 2040. The International Air Transportation Association (IATA) estimates that the total number of air passengers will surpass 10 billion by 2050. That is double what it is in 2025.

Looking ahead, all signs point to a continuation of population and income growth (driven largely by Asia) that will amount to over 1.19 billion people being able to travel.

TABLE 1.1: INCOME MOUNTAIN GRAPH - 1950.

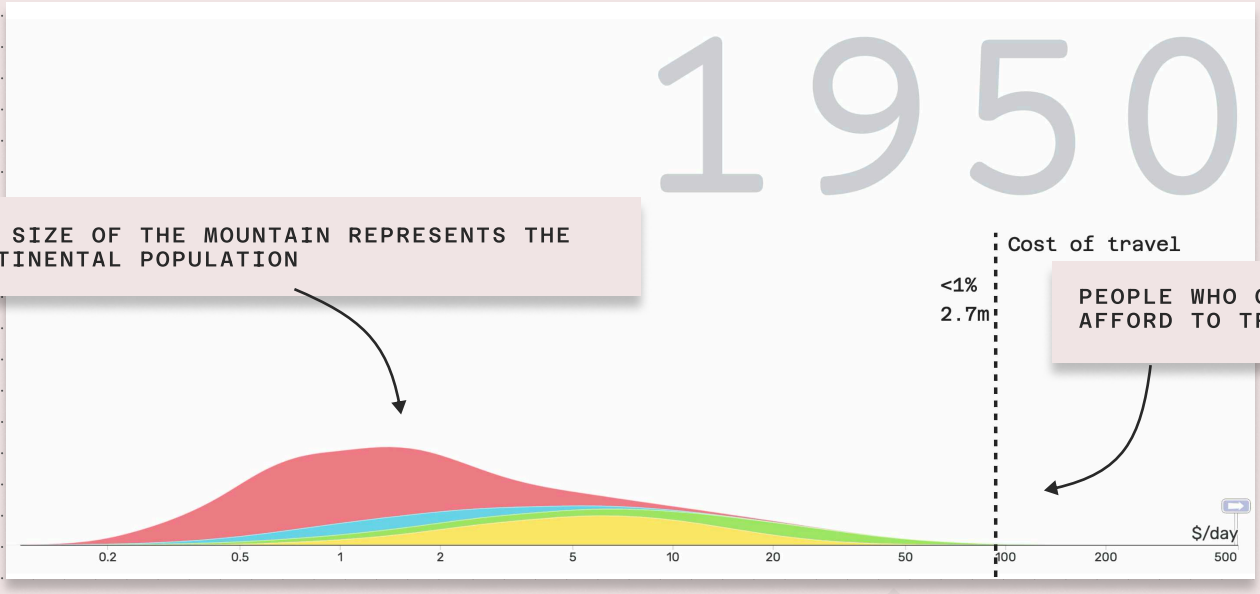


TABLE 1.2: INCOME MOUNTAIN GRAPH - 2023.

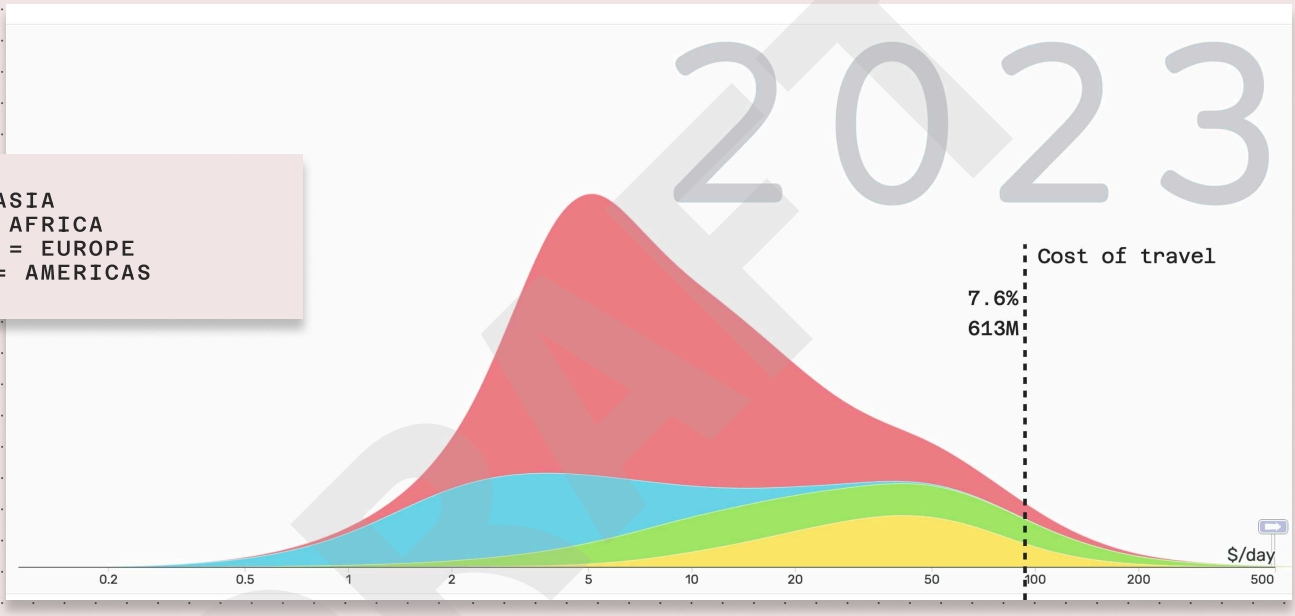
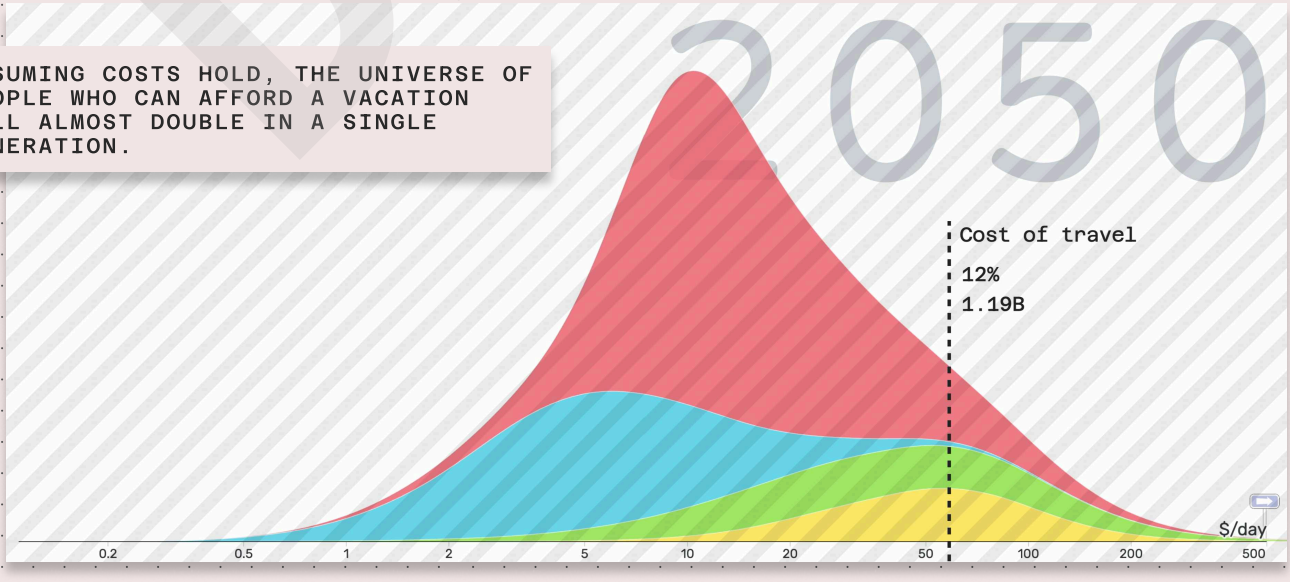


TABLE 1.3: INCOME MOUNTAIN GRAPH - 2050.



SOURCE: GAPMINDER, UNWHO, 2025

Overtourism

An unstoppable force meets an immovable object

The extraordinary growth in both the number of people who can afford to travel, and the accessibility of global destinations, has tested the limits of many destinations around the world.

The concept that there are limits to growth in travel and tourism is not a new thing. The idea first emerged in a study on the state of tourism in cooperation with the National Park Service in the 1960s (JA Wagar, 1964), that highlighted the threat of an overwhelming number of visitors at Yellowstone National Park. Despite pleas for further research and action, however, little was done. The assumption was that the tourism industry perceived the high levels of arrivals as either manageable, or so temporary that their negative effects could be mitigated.

As the number of visitor arrivals and the accessibility of travel and tourism continued to grow, that perception began to shift. From 2010 onwards, signs that destinations and attractions around the world were buckling under the unrelenting pressure of visitors were emerging each and every year. In 2012, the No Grande Navi movement emerged in Venice, in protest of the impact of cruise ships on the historic city of Venice. That same year, a photo of mountaineers lining up towards the summit of Everest went viral as the world's tallest peak became a commercial operation that made it accessible to thousands of climbers.

By 2015, global industry media outlet Skift, gave the phenomenon a name: 'overtourism'. Overtourism is what happens when the volume, concentration, or behaviour of visitors in a place pushes it past what locals, infrastructure, and ecosystems can comfortably handle —so the destination's day-to-day life and long-term health start to degrade. It isn't so much a description of 'too many tourists', as one that denotes the realities of social, environmental and economic pressures caused by tourism itself.

Despite there being no globally accepted definition for what overtourism is, nor any standard of its measurement, what is clear is that its impacts have worsened. In 2024, overtourism was linked to landslides in India, which resulted in the deaths of hundreds. In 2019, Koh Phi Phi Leh, Thailand saw tens of thousands flock to Maya Beach, overwhelming the ecosystem, resulting in the destruction of 80% of the coral reef. More recently, there have been protests in Barcelona and Venice, denouncing the impacts of cruise ship visitors, short-term rentals, and liveability for city residents.

The New York Times 01.21.2026

In Europe, the Allure of Summer Travel Keeps Dimming

WORLD ECONOMIC FORUM 10.04.2018

Thailand is closing its iconic bay indefinitely to repair destruction by tourists

The Guardian 06.19.2025

Anti-tourism protests in Europe grow.

Maine Tourism

THE STATE-LEVEL BACKDROP

Brief History of Maine Tourism

From the 'golden age' of travel to today

To understand the travel and tourism situation in Bar Harbor, we should first look at the statewide context around tourism in Maine. To do that, we'll look at three elements around the state of travel and tourism: arrivals, spending, and jobs.

The 2010s: the importance of tourism for the state surges

Strategic planning in the early 2000s identified tourism as essential to rural development and small business vitality, especially in coastal communities like those around Bar Harbor. Since that time, the industry grew into a major economic pillar for the state and by the late 2010s, that trend had matured into a high-volume, high-dependency visitor economy. In 2019, before the COVID-19 pandemic, tourism in Maine supported roughly 116,000 jobs, almost 17% of all employment in Maine, and generated about $6.5 billion in direct visitor spending.

The 2020s: the pandemic and revenge travel

Like much of the travel and tourism industry worldwide, COVID-19 interrupted this trajectory. Visitor numbers and spending collapsed in 2020, with trips falling by more than a quarter and tourism-supported employment dropping to around 90,600 jobs. Unlike the rest of the world, however, Maine's recovery was rapid. The state emerged as a 'drive-to, outdoor destination' for pandemic-era travel. Visitors who might otherwise have flown overseas, taken a cruise to the Caribbean, looked closer to home instead and sought outdoor, front-country adventure. This surge pushed spending in 2022 to new highs, with visitor spending and jobs breaking historic records.

Post 2023: normalization & new dynamics emerge

By 2024, the pandemic-era numbers were beginning to normalize. According to the Maine Office of Tourism (MOT), the state had recorded a fourth year of declining visitors, reaching 14.8 million in 2024, 10% fewer than its historic record in 2019. Visitors to the state, however, were staying longer and spending more per trip. Adjusting for inflation, direct tourism spending has risen from roughly $8 billion (2019, in 2024 dollars) to $9.23 billion in 2024. This represents a real increase of about 16%. Per visitor, this shift is even more pronounced: inflation-adjusted spend per visitor appears to have risen by about 30%. In economic terms, Maine is now extracting more output and tax revenue per worker and per visitor than before the pandemic, albeit with persistent pressure on staffing and housing in tourism-dependent communities, like Bar Harbor.

Maine's Shifting Strategy

From the 'golden age' of travel to today

Statewide, the strategic conversation has shifted from simply growing volume to managing when, how, and where visitors show up. Maine's tourism authorities now talk explicitly about strengthening shoulder seasons, improving digital presence and "destination optimization".

Put simply, Maine's tourism economy is larger and more lucrative than it was before COVID, but as concerns around capacity, housing, workforce and resident tolerance grow, they are beginning to shift planning away from 'how do we regain lost visitors' towards 'how do we channel higher-value demand into patterns of visitation, mobility and spending'.

The statewide data (refer to Figure 1: 2024 Maine of Tourism Highlights on page 9) and published strategy suggest that the priority moving forward is how to attract tourists that spend big and stay for a long time, without adding more pressure on limited resources, infrastructure and systems in Maine.

2024 Maine Office of Tourism Highlights

MAINE.

BY THE NUMBERS

In 2024, 14.8 million visitors spent more than **$9.2 billion** in Maine. Compared to 2023, visitation softened by 3.1% while spending increased by 1.8%. **The state attracted a higher-value visitor with average visitor spending increasing by 5% to $624, resulting in direct visitor spending of $9.23 billion**. Last year's visitors also saved every Maine household $2,290 in state and local taxes.

MAINE OVERNIGHT VISITORS

Throughout 2024, visitors to Maine generated **12,360,200 nights** in accommodations, up 0.8% from 2023. Typical visitors stayed 4.5 nights on their trips. Lodging revenue by overnight visitors totaled **$2,226,741,500**, an increase of 1% over 2023.

OVERNIGHT VISITATION

Non-residents = **10,033,555**
Residents = **1,868,345**

OVERNIGHT VISITOR DIRECT SPENDING

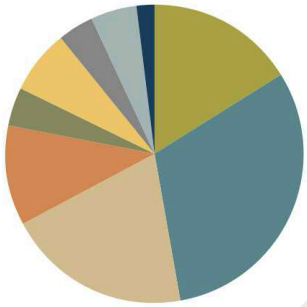
Non-residents = **$7,598,514,300**
Residents = **$1,414,916,900**
Total Overnight Visitor Spending = **$9,013,431,200**

CANADIAN VISITORS

Number of Visitors = **797,900**
Direct Spending = **$497,765,900**

MAINE DAY VISITORS

Maine hosted over 2.89 million day visitors in 2024. Day travelers to Maine accounted for **$219.8 million** in direct expenditures, up 9.6% from 2023.



VISITOR ORIGINS

16%	Maine	7%	Midwest
31%	New England	4%	West
20%	Mid-Atlantic	5%	Canada
11%	Southeast	2%	Other Intl
4%	Southwest		

TOTAL VISITOR DAYS

All visitors to Maine spent **67,267,400 days** in Maine throughout 2024. Compared to the previous year, occupancy remained level at 54%, and there was an increase in room nights (+0.8%) due to slightly more visitors staying in paid accommodations (+2%).

VISITORS & JOBS

Visitors to Maine supported **115,900 jobs** throughout Maine and **$5.4 billion** in wages in 2024, +1.9% from 2023. Every 128 visitors support a job in Maine.

14.8 MILLION VISITORS

$9.2 BILLION DIRECT EXPENDITURES

116 THOUSAND JOBS SUPPORTED

ECONOMIC IMPACT OF TOURISM

	2023	2024	Change
Jobs Supported*	115,300*	115,900	+ 0.5%
Total Earnings	5,333,630,700*	5,432,711,700	+ 1.9%
Total Taxes	1,384,355,000*	1,412,433,700	+ 2.0%

DIRECT TOURISM EXPENDITURES

	2023	2024	Change
Accommodations	2,204,380,500	2,226,741,500	+ 1.0%
Restaurants	2,102,869,500	2,226,210,100	+ 5.9%
Shopping	1,555,630,000	1,670,396,500	+ 7.4%
Transportation	898,320,100	872,926,700	- 2.8%
Groceries	731,313,600	675,655,200	- 7.6%
Entertainment	1,260,061,200	1,246,528,900	- 1.1%
Other	314,038,400	314,820,100	+ 0.2%
Total	**$9,066,613,300**	**$9,233,279,000**	**+ 1.8%**

TOTAL VISITATION

	2023	2024	Change
Visitation	15,267,000	14,800,600	-3.10%

*Data for 2023 updated due to revised IMPLAN model.
**Maine's economic impact multiplier changed from 1.80 in 2023 to 1.72 in 2024. The figures for jobs supported and total earnings are the total impact from tourism (including direct and indirect impacts).

Source: Downs & St. Germain Research with IMPLAN economic modeling. Calculations include only direct impact from tourism.

FIGURE 1: 2024 MAINE OFFICE OF TOURISM HIGHLIGHTS

The Visitor Profile

Who visits Bar Harbor?

A gateway town with a big draw

For Bar Harbor, the bigger-picture context of global macroeconomic shifts and regional changes to Maine's tourism strategy matter. As a small town with a rich history, local character and the main gateway to Acadia National Park, Bar Harbor attracts millions of visitors each year becoming a major destination for the US market. As such, it's susceptible to the same forces of global travel that impact Venice, Paris, and Yellowstone National Park.

Market composition

The town's primary markets are within New England and the broader Northeast, with strong drive-market traffic from states like Maine, Massachusetts, New York and beyond.

A smaller share flies into regional airports and connects by road, and or visits the destination via cruise ship (although since the cruise ship cap, that number has dropped off). International visitors, primarily Canadians, are important but make up a relatively small proportion of total visitation; the town's economy, seasonality and business mix are largely shaped by domestic rather than long-haul international tourism with family and couples being the dominant segments.

The graphic on page 11, which maps the origin of Bar Harbor's visitors for the year 2024, illustrates the dominance of the Mid-Atlantic "drive markets", the secondary flow from larger metros like New York, DC and the Southeast who either road-trip or fly into Portland, Bangor or Hancock County and then drive the last leg.

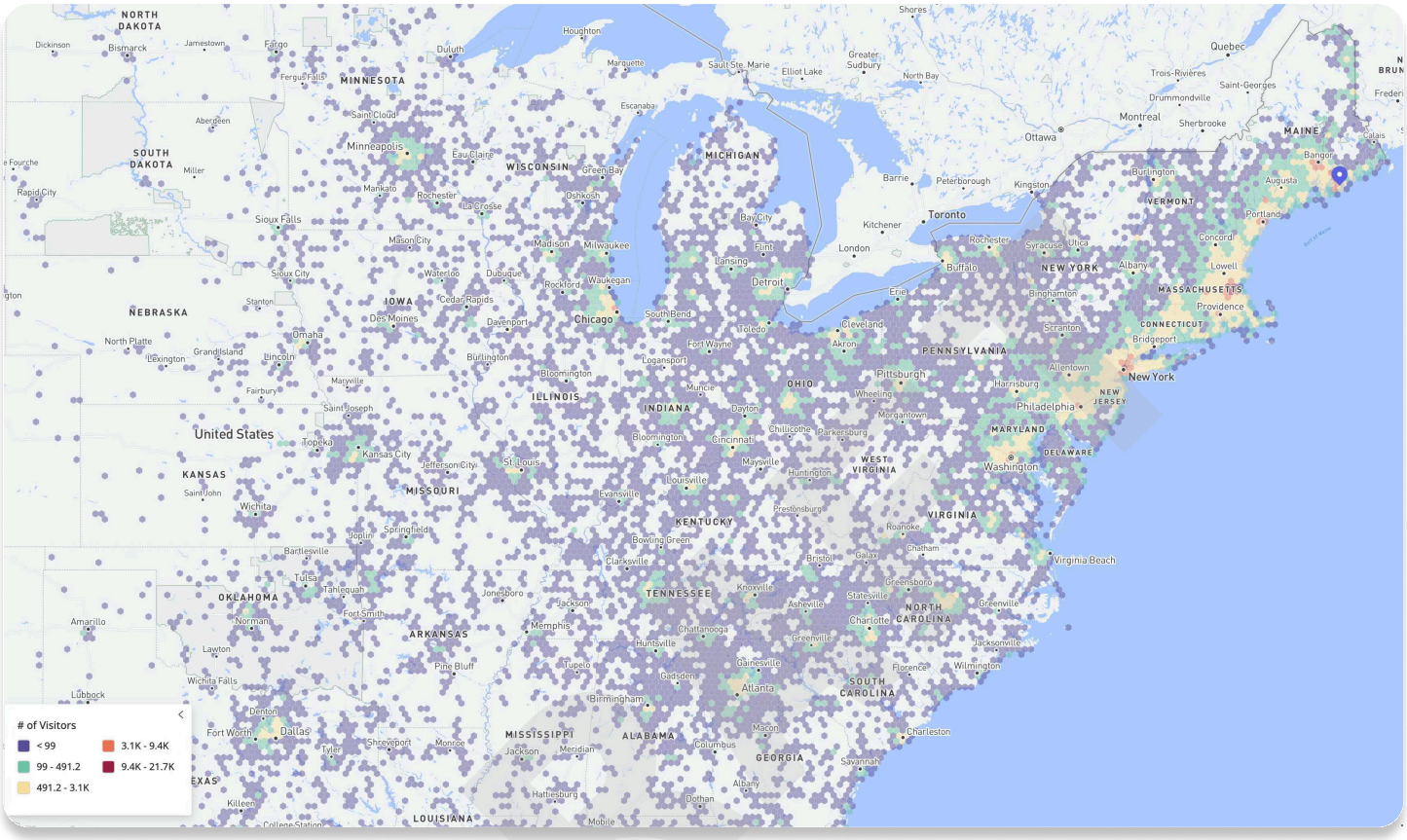


FIGURE 2: ORIGIN OF BAR HARBOR VISITORS, 2024

Why visitors come

According to the Maine Office of Tourism (MOT), the incentives for travelers include: national park scenery (without the crowds of the Rockies), cooler summers than the Mid-Atlantic and South, a classic New England harbor town with lobster, lighthouses and walkable streets, and a dense menu of low-friction outdoor activities: hiking, scenic drives, whale-watching, foliage, and short coastal cruises.

US travel media frames Bar Harbor as a "quintessential" New England seaside town and gateway to Acadia, routinely appearing in "best small towns to visit" and "perfect New England road trip" lists, and in rankings of Mount Desert Island (MDI) as one of the top islands in the U.S. for scenery and food.

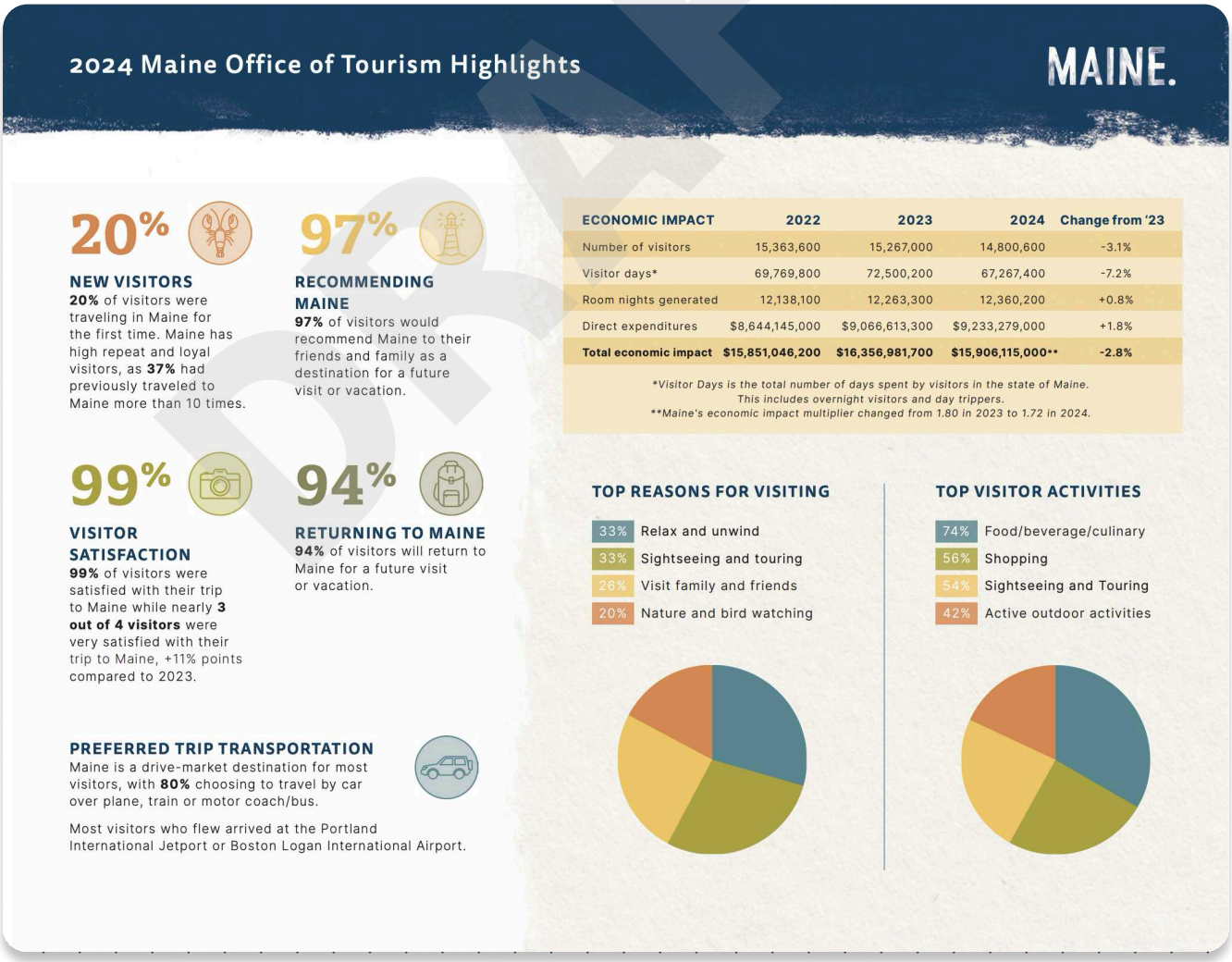


FIGURE 3: MAINE OFFICE OF TOURISM HIGHLIGHTS: TOP REASONS FOR VISITING AND TOP VISITOR ACTIVITIES

Brand Bar Harbor

In terms of brand recognition, both Bar Harbor and Acadia National Park sit squarely in the travel aspirations of Americans. This is best reflected in Google Search Trend results, which highlights how frequently search terms are used within specific geographies. Search term results for Acadia National Park and Bar Harbor perform relatively well when set against other major parks in the US, as per tables 2.1 and 2.2. As shown in table 2.1, While Yellowstone outperforms all other parks, both Acadia and Bar Harbor perform well when compared to Zion and Rocky Mountain National Park.

Recognition among international markets

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However, comparing search trends for Bar Harbor outside of the US with the likes of Banff, the Lake District, Cinque Terre, Giant's Causeway, Wadi Rum, and Uluru, Bar Harbor is essentially unknown. Within the last 12 months, Bar Harbor is the least searched term comparing all attractions in the markets we analyzed (France, the UK, Germany, Sweden, Italy, Spain, the Netherlands, India, Australia and the UAE). [note, we ran the same comparisons replacing Acadia National Park with Bar Harbor, and the results were the same].

Brand Bar Harbor

The risks and upsides of being a destination loved by locals

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TABLE 2.1: COMPARING SEARCH TREND ANALYSIS RESULTS FOR US NATIONAL PARKS IN THE US, 2025

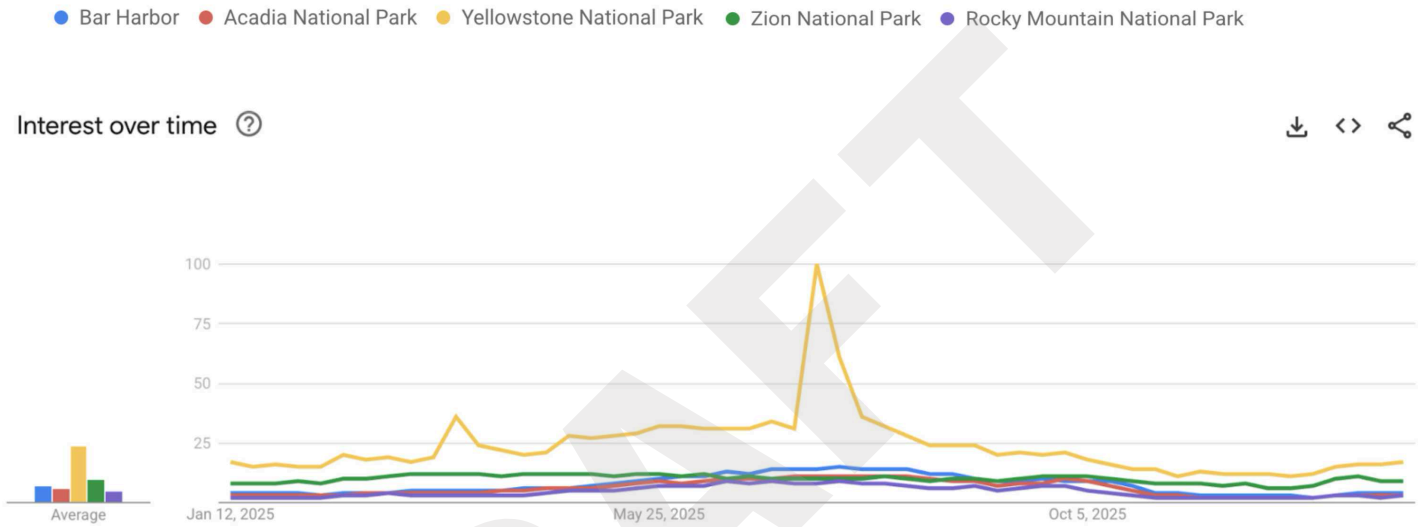
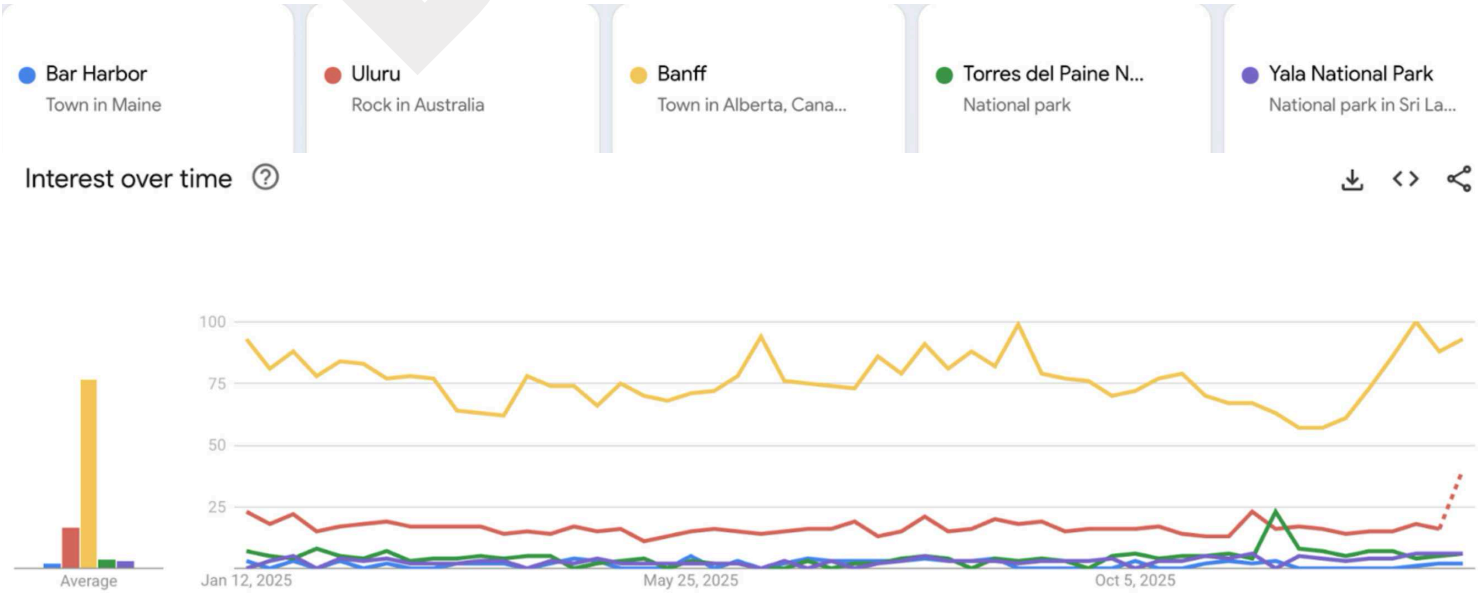


TABLE 2.2: COMPARING SEARCH TREND RESULTS FOR BAR HARBOR WITH OTHER INTERNATIONAL DESTINATIONS, UK, 2025



Planning implications

What the brand and market means for Bar Harbor's future

Treat the domestic Northeast market as the "anchor tenant" of the visitor economy

Keep Bar Harbor's core brand pointed squarely at its established drive markets in New England and the broader Northeast. These visitors already know the Bar Harbor / Acadia story, can reach it easily, and proved resilient through COVID.

Align with Maine's "higher-value, lower-volume" strategy

State-level data shows Maine already leaning into fewer visitors spending more (explored in more detail below) The town can mirror this by targeting segments that fit Bar Harbor's constraints: walkers, hikers, nature lovers, food and culture travelers, educational and conservation-focused visits.

Plan now for a "step change" in demand from India, China and other emerging markets

Instead of asking if these markets will discover Acadia, assume when. Determine how to position the brand in the context of what might happen, and look to seasonal advantages that might promote the destination in the winter months among international segments.

Spread visitation beyond peak season

Consider how Maine Tourism or local marketing business channels might encourage off-season visitation to move visitors into the shoulder months, and reshape the seasonal nature of the current markets.

Footfall

Understanding crowds in Bar Harbor

Footfall Analysis

What it does and why it matters

A footfall analysis is used to understand how crowds affect a destination. It looks at where visitors go, how long they spend there, and on what days, time of year, or even at which hour people visit Bar Harbor. Read alongside seasonality and economic impact, footfall shows not just how big tourism is in Bar Harbor, but whether the current pattern of visitation is compatible with a thriving year-round community—and where policy levers might shift that balance.

Regional Visitor Traffic

Approach

We took two distinct approaches to the footfall analysis. The first looked at the regional distribution of visitors. It sought to understand which parts of the Town and nearby areas, including Acadia National Park are visited the most often and in what number. This helps us understand where and how visitors are moving across key part of Bar Harbor and its visitor attractions.

The regional footfall analysis uses PlacerAI mobile-location modeling to estimate visits and dwell time across five 750-foot regional zones at critical points in and around Bar Harbor.

The main period analyzed is December 2023 to November 2025. The five 750-foot zones use a 10+ minute dwell-time threshold to reduce pass-through noise. For the regional analysis, the areas identified are included below:

- Waterfront – covers the shoreline, harbor and pier areas, including municipal and private docks that support sightseeing vessels, cruise tendering, and pedestrian movement
- Downtown – captures the core commercial area of Bar Harbor along Main Street and adjacent blocks, measuring pedestrian activity across retail, dining, visitor services
- Cadillac Summit – monitors footfall at the summit of Cadillac Mountain, capturing peak-period visitation linked to high demand areas.
- Eden Street – tracks pedestrian activity along the Eden Street corridor, including hotel clusters, roadside services and access points to Acadia National Park.

Regional Visitor Traffic

Approach

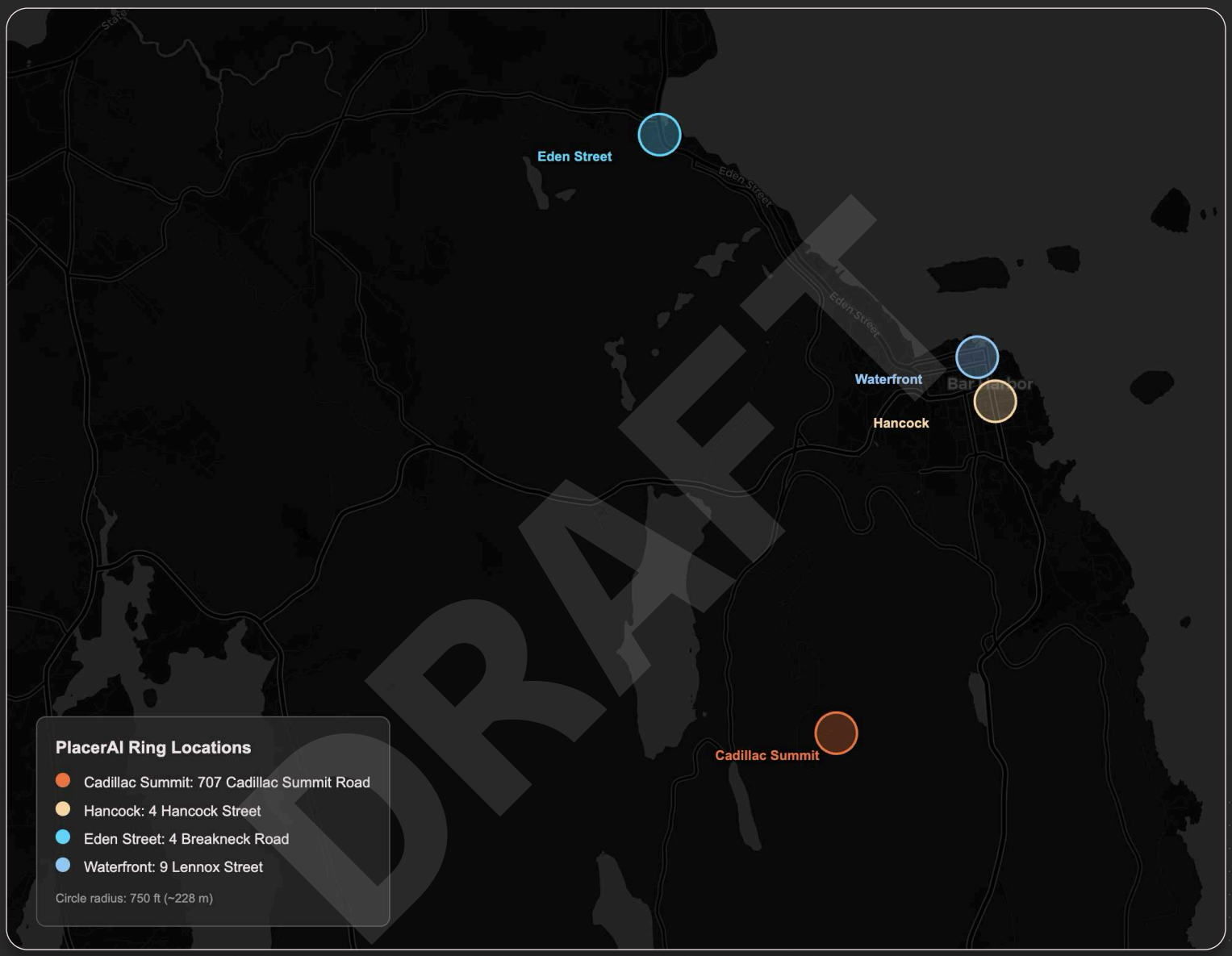


FIGURE 4: SENSOR PLACEMENT FOR REGIONAL ANALYSIS

Findings at the Regional Level

Finding 1: the Waterfront is the bottleneck

The Waterfront dominates visitor traffic, averaging 4,900 daily visits and peaking at 21,157 visits on July 4th, 2025. By comparison, the next-busiest zone, Hancock Street, averages just over 2,000 daily visits, while the Downtown Main Street sensor records about 1,600. Cadillac Summit and Eden Street sit lower in absolute numbers but show extreme park-linked seasonality.

In simple terms: the Waterfront absorbs almost 2.5 times the volume of any other location, making it the town's primary bottleneck and the first place where visitor pressure turns into congestion and conflict with local life.

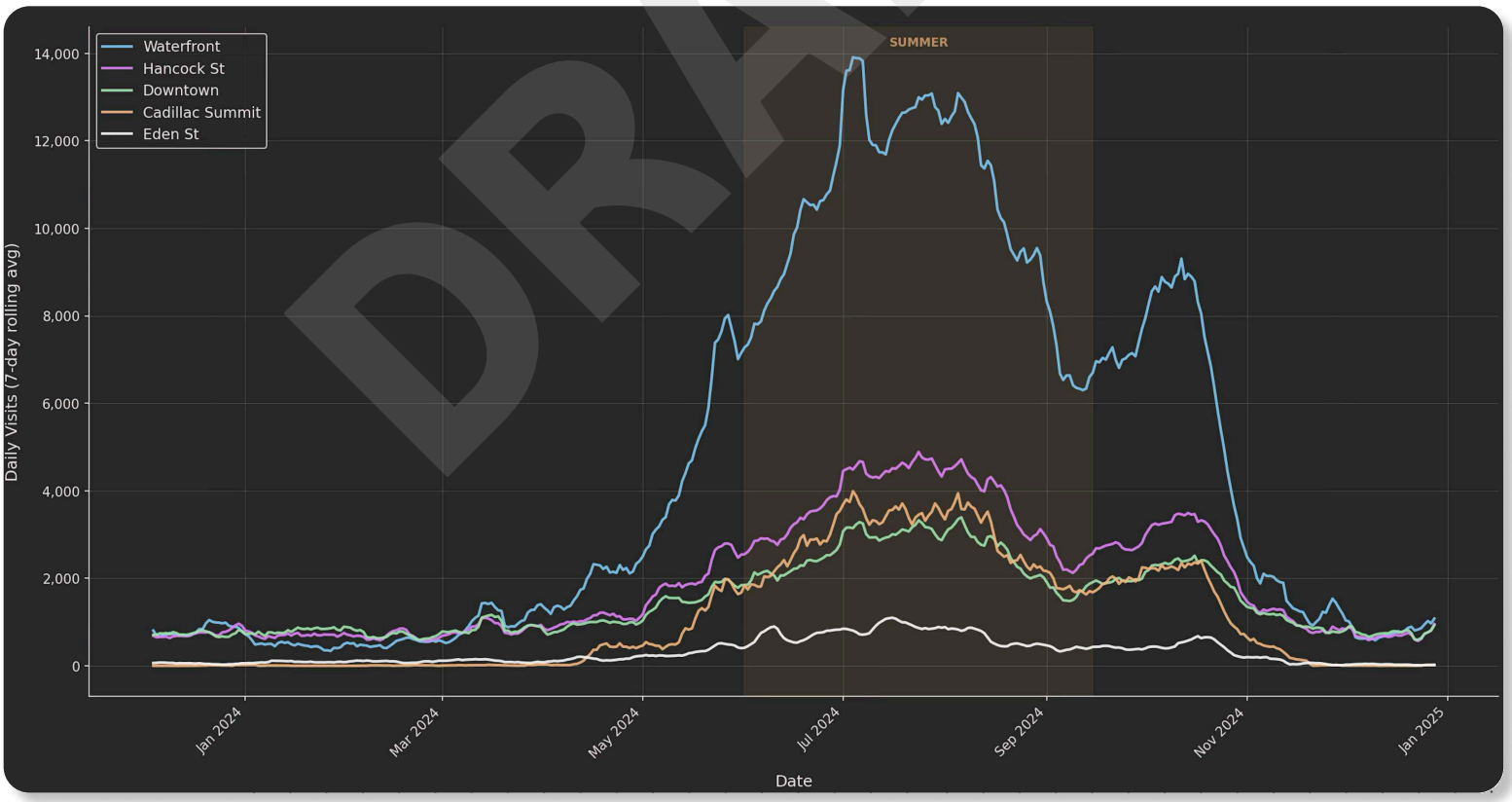
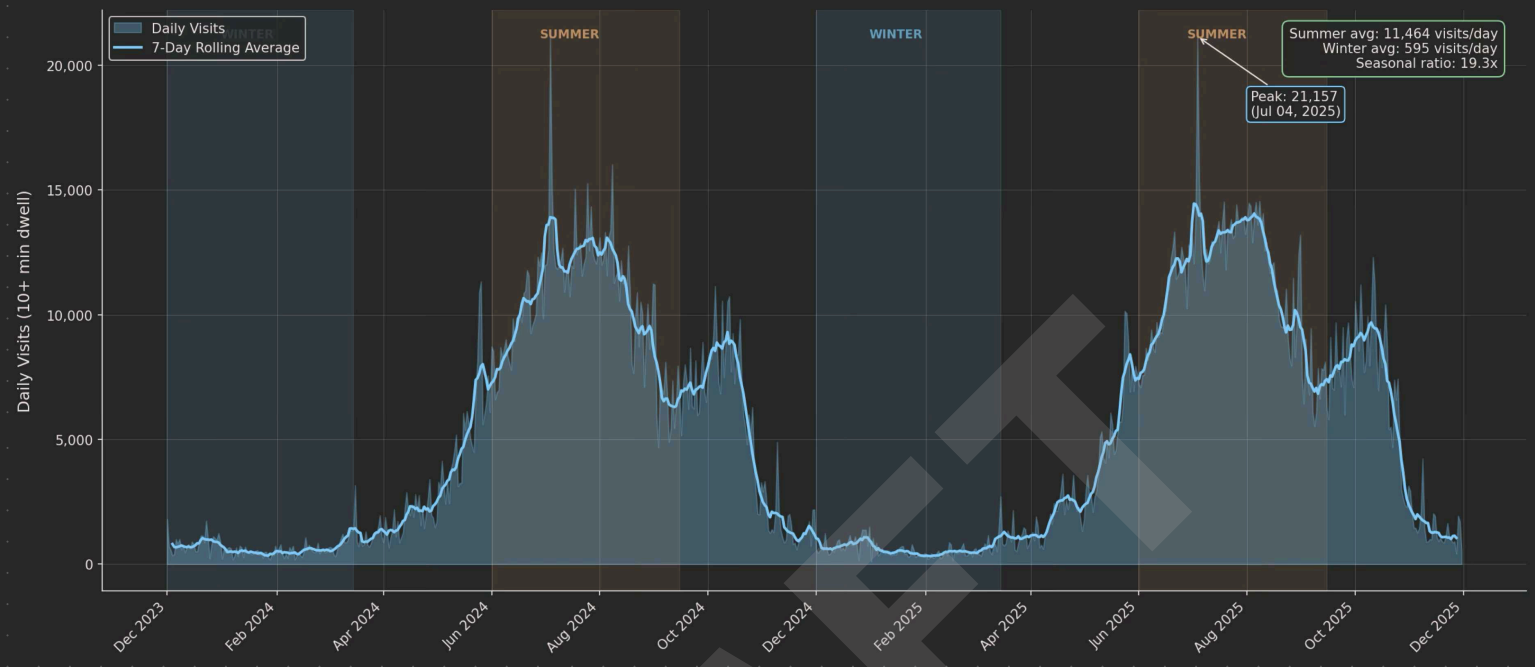


FIGURE 5: FOOTFALL IN AND AROUND BAR HARBOR

TABLE 3.1: FOOTFALL - WATERFRONT,BAR HARBOR, 2024-2025



FOOTFALL - DOWNTOWN, BAR HARBOR, 2024-2025

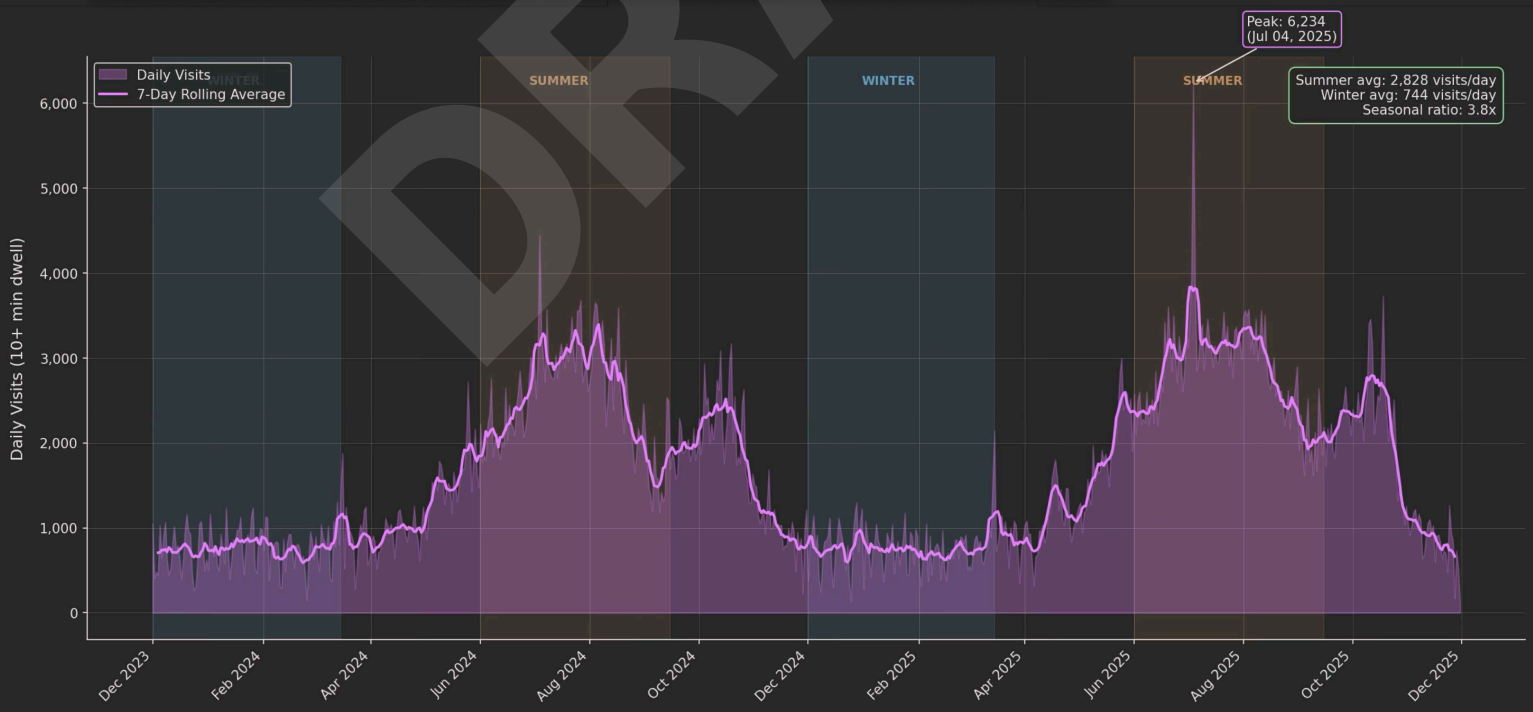
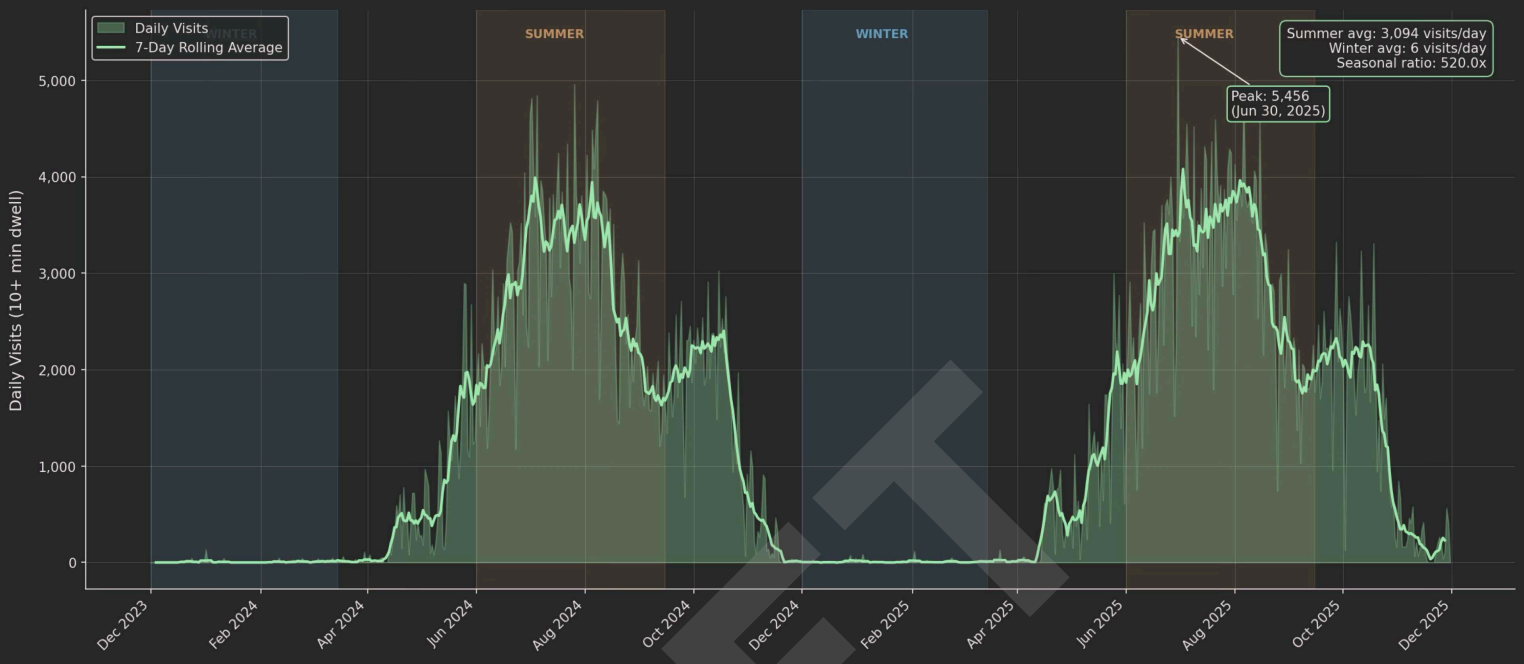


TABLE 3.3: FOOTFALL - CADILLAC SUMMIT, BAR HARBOR, 2024-2025



Finding 2: scale is amplified by a small, permanent population

That concentration is amplified by Bar Harbor's small permanent population. With only around 5,300 residents in 2025, a single busy day in summer at the Waterfront can see three times the town's population within a 750-foot radius in a single day. In practical terms, this means Bar Harbor experiences crowding dynamics more commonly associated with much larger urban destinations, but without the spatial buffers, transport redundancy, or service depth those places rely on.

What would be a manageable surge spread across multiple neighborhoods in a city instead compresses into a handful of blocks, streets, and public spaces. The result is that relatively modest changes in visitor numbers can have outsized effects on congestion, walkability, emergency access, and resident experience.

Finding 3: seasonality compounds tourism pressures

Seasonality compounds that spatial concentration. Across all five locations, summer is dramatically busier than winter, but the scale of variation differs. Between summer and winter, the Waterfront's seasonal ratio is 19 times greater, while Cadillac Summit's is over 500 times. These areas are hyper-seasonal: almost dormant in winter, then flooded in late spring, summer and early fall. By contrast, Downtown's seasonal ratio of just 3.5x makes it the most stable, year-round environment in the dataset, with winter averages of ~750 daily visits.

That resilience matters for sustainable planning: it suggests downtown has the strongest base of year-round activity to support local businesses and residents, while waterfront and park-adjacent zones are structurally exposed to boom-and-bust patterns in visitation.

Finding 4: seasonality creates major pressures

In 2024, the monthly profile underlines how sharply the town "switches on." At the Waterfront, average daily visits jump from ~5,100 in May to ~9,500 in June and nearly 12,800 in July. Cadillac Summit more than doubles between May and June as the park road fully opens, while Eden Street's traffic also more than doubles, reflecting the surge of vehicles entering Acadia from Route 3. There are two 'seasons' that stand out for planning purposes.

1. The September drop is remarkably uniform: all locations see a 33–38% fall from August as schools return and family vacations end. This suggests the town can treat September as a clear transition point for staffing, transport, and services—still busy, but noticeably less intense than July–August.
2. October: downtown and inland locations see a 17–22% jump in average daily visits between September and October, driven by leaf-peeping, while the Waterfront barely moves. This implies that foliage visitors behave differently from high-summer families and cruise passengers: they spend more time walking town streets, eating out, and using services rather than crowding the pier. There is a clear opportunity to lean into October as a "quality over quantity" season, with high downtown engagement and relatively less strain on waterfront infrastructure.

Finding 5: minor differences between weekends and weekdays

For most locations, the weekend "premium" is small (0–7%), indicating that in peak season the town is busy every day. Cadillac Summit is the exception, with lower weekend traffic than weekdays, likely reflecting the role of organized coach tours and sunrise trips that operate on weekday schedules. For Main Street businesses, this implies that managing everyday pressure matters more than "weekend crowding." For Acadia and transport planners, it hints at smoothing traffic by nudging commercial tour operations toward a more even temporal distribution if needed.

Planning implications

What the regional footfall analysis means for planning purposes

Taken together, the analysis paints a picture of asymmetric pressure. Waterfront and park-adjacent areas experience acute, short, high-intensity peaks driven by weekend trips, cruise operations (until recently) and national park access. Downtown carries the broadest and most stable share of annual activity, including key October shoulder-season demand.

Against the backdrop of state-level tourism growth and record Acadia visitation, and with legal limits on cruise disembarkations now in play, the data suggests there are several options for Bar Harbor's Sustainable Tourism Planning worth consideration:

- Protect and manage the Waterfront as a high-risk, high-impact gateway, ensuring it can cope with concentrated loads without degrading resident quality of life;
- Nurture Downtown's role as the year-round economic spine, supporting businesses that serve both visitors and locals; and
- Use shoulder seasons, especially October to rebalance the town's tourism model away from sheer volume at a few waterfront choke points and toward more dispersed, higher-value visitation across streets, months, and activities.

In-town Visitor Traffic

Approach

The second approach explored a more localized distribution of visitors. For this, we examined smaller areas within the Town. The objective in this analysis is to identify areas of high congestion within the town, pinpointing areas of particular concern, and disbursement in key areas.

Using PlacerAI data, we looked at all visitation types, for any length of time. Noting that ‘pass through traffic’ of less than 10 minutes would still be noticeable for crowding and congestion, it was therefore included in the analysis. As such, we did not set any ‘dwell time’. Zones were selected to ensure that there was no overlap between areas selected.

The areas were named below:

- 1 West Street – covers waterfront and pier area, including municipal and private piers that offer sightseeing, whale-watching, cruises and private vessels.
- 4 Cottage Street – is the heart of downtown Bar Harbor, along the main shopping corridor, capturing the primary areas for tourism, retail and dining, alongside the Bar Harbor visitor information center.
- 114 Main Street – this captures the southern stretch of Main Street, primarily those venturing further along the commercial strict, towards shops and peripheral services.
- 11 Rodick Street – this includes the Village Green and Rodick Street, which doubles as a transport hub with cafes, bars and restaurants around the pier-side traffic.

FIGURE 6: SENSOR PLACEMENT FOR LOCAL ANALYSIS

Findings at the Local Level

Finding 1: extreme seasonality and peaks in West Street

The data shows extreme seasonality and extraordinary peaks: winter averages of around 70 visits per day explode to more than 4,200 in summer, a 61x seasonal ratio. Peak days (especially 4 July) hit nearly 10,000 visits in a very small area.

Average dwell times of 70–80 minutes suggest people are spending time waiting for boats, queuing for tenders, and using the waterfront as a staging area, in addition to waterfront restaurants and nearby cafes, Year-on-year, comparable June and September traffic declined slightly (~-2.7% from 2024 to 2025), hinting that some pressure may already be shifting away from the pier as cruise caps and changing visitor patterns take effect. In planning terms, West Street is best understood as a high-intensity, short-season gateway.

Finding 2: Cottage Street has the highest levels of footfall

Unsurprisingly, this area carries the highest volume of footfall data in the dataset: more than 2.5 million visits across three years, nearly double the Waterfront. It is also the most resilient: even in winter it sustains 200–350 daily visits, and its summer-to-winter ratio (~20x) is far lower than the 60–160x swings elsewhere. That tells us two things:

- Cottage Street is where visitor and resident life are most likely to consistently overlap;
- It's the best single indicator of overall tourism health for the town.

The trajectory is notable: a dip in 2024 (-5.2%) followed by a strong rebound in 2025 (+7.8% for the year and +13.9% in June+September). Combined with Maine-wide real growth in visitor spending, this supports the idea that downtown Bar Harbor is recovering and upgrading in value, even as the town imposes tighter controls on cruise volumes.

TABLE 4: COMPARING THE LOCAL DYNAMICS OF DIFFERENT AREAS WITHIN BAR HARBOR, 2024

WATERFRONT, AUGUST, 2024

Finding 3: crowds drop off before 114 Main Street

Hosting many of the town's shops, this area saw the lowest level of footfall of all four areas. In fact, PlacerAI models did not let us extract data for multiple months as it fell below their threshold required for accurate models. Despite this, we were able to extract data for the high volume months (June and September) which still paint a clear picture.

- Average dwell times are shortest (around 40 minutes), and visit frequencies are lowest, suggesting pass-through behaviour rather than long stays.
- The weekend premium (+15.6%) is the strongest of any ring, indicating that this part of town is particularly attractive to weekend leisure walkers.
- Year-on-year, June+September visits grew by about 10.6% from 2024 to 2025.

Finding 4: Rodick street is a high-traffic area for visitation and staging

This area functions as a transport hub and staging zone. Rodick Street recorded an increase of 8%, with higher footfall across almost every peak-season month (June–September).

It has the most extreme seasonality of all rings: a 160x summer-to-winter ratio, with many winter days reporting zero visits. It has by far the longest dwell times (127–137 minutes), consistent with people waiting for or transferring between buses and organized tours rather than just walking through. It is the only ring where weekdays are busier than weekends, reinforcing the role of scheduled tour groups and shuttle services. It also shows the strongest cruise-day uplift (+37% in the matched analysis), which fits its role as a staging point for cruise excursions and bus tours.

Finding 5: seasonality creates major pressures

In 2024, the monthly profile underlines how sharply the town "switches on." At the Waterfront, average daily visits jump from ~5,100 in May to ~9,500 in June and nearly 12,800 in July. Cadillac Summit more than doubles between May and June as the park road fully opens, while Eden Street's traffic also more than doubles, reflecting the surge of vehicles entering Acadia from Route 3. There are two 'seasons' that stand out for planning purposes.

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Planning implications

What the footfall analysis means for planning purposes

The footfall analysis confirms that each area of Bar Harbor, even those that are just 250ft in radius, behave differently at different times of year. For sustainable tourism planning, that means moving beyond generic town-wide numbers and designing policies or solutions that respond to the specific challenges of each individual location, based on the dynamics and interactions of both residents and tourists.

This includes protecting the resilience of Cottage Street and the northside of Main Street, managing acute summer and cruise spikes along West Street and the Village Green, and using mobility and wayfinding to spread benefits (and burdens) more evenly through the town.

Pulling these patterns together:

- Downtown (Cottage Str. + Main Street) is the year-round, economically critical spine. It has the highest volumes, the lowest seasonality, and shows strong growth in 2025. It's where any strategy for quality jobs, local entrepreneurship and shoulder-season resilience needs to focus.
- The Waterfront and Rodick Street are operational pinch points. They deal with the most extreme seasonal swings and are where cruise and transit systems exert the greatest pressure. Changes to cruise caps, Island Explorer schedules, or tour-bus management will be felt here first.
- Mobility policy is land-use policy. Because Ring 4 [Figure 6, Page 29] is both a bus hub and the most cruise-sensitive zone, investments in transit (e.g. better Island Explorer capacity, more shoulder-season service) can directly influence how much of that 160x seasonality is absorbed by buses and green space rather than private vehicles and informal coach staging.
- Micro-scale data supports micro-scale interventions. Knowing that Main Street south has the strongest weekend premium, or that waterfront dwell times are over an hour, allows very targeted measures: re-timing deliveries, reallocating curb space, adjusting wayfinding to encourage dispersal, or programming shoulder-season events where footfall is already relatively strong.

Dynamics of cruise ship visitors

Lessons in visitor dispersal

The more localized approach in footfall data analysis also lends itself to analyzing exactly how cruise ships affect footfall. Against the backdrop of the recent cruise ship cap, which was approved by voters in 2022 and upheld in subsequent local votes, this analysis is critical long-term sustainability planning. It tells us not just how many additional people there are, but where they go, which streets and services absorb the impact, and what might change as the cap comes into full effect.

Against the backdrop of the cruise ship cap, this analysis compares footfall on cruise days to matched "control" days (control days are days in which there are no cruises in port, but still within a reasonable time period of the last cruise in port). Cruise ship passengers use Ells Pier to disembark and embark, located in the Waterfront area in Zone EE.

To model dispersal—and the extent to which cruise passengers disperse into Downtown (zones E1 [Sensors: Cottage Street and Main Street], and zone F, E2 [Sensor: Rodick Street])—we compared footfall in the Waterfront against Cottage Street, Main Street and Rodick Street.

We then identified:

- Days when vessels were in port and their berth capacity; and
- Matched control days ± 2 days from the cruise day, matched by weekday/weekend where appropriate, to control for seasonality and weekend surges.

We examined June and July in 2024 and 2025. We did not explore years prior (2022/2023) because the post-pandemic surge/"revenge travel" phenomenon could bias results.

THIS IS TO PROVIDE AN ILLUSTRATIVE REFERENCE FOR THE CONTENT ON PAGES 35 AND 37.

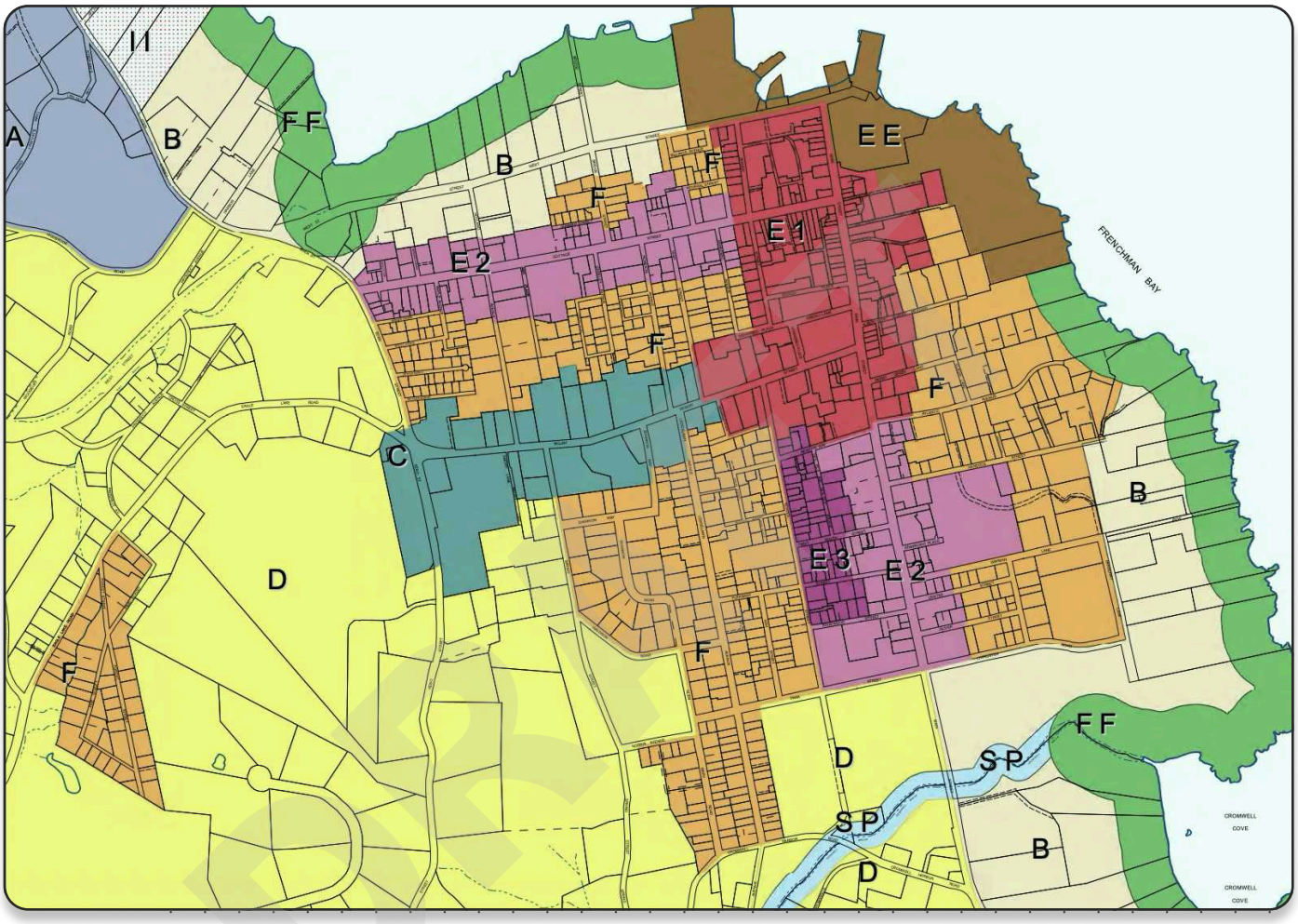


FIGURE 7: ZONES - BAR HARBOR

Findings

Finding #1: cruise days lift the whole grid

When a cruise ship is in port, the Zone EE, E1 and F receive more footfall traffic. Based on the data available, all four areas show a double-digit percentage increase in visits on cruise days:

- Pier (West Street): about +12%
- Downtown / Cottage Street: about +13%
- Downtown / Main Street: about +12%
- Village Green / Rodick Street: about +37%

Cruise days lift activity across the whole downtown grid. The fact that Cottage Street and Main Street areas see gains of 12–13% is important: it contradicts the idea that cruise passengers mostly bypass downtown or only mill around the waterfront. Instead, they clearly walk up into the commercial core, adding a meaningful layer of demand on streets that are already busy with land-based visitors.

The Village Green / Rodick Street data is an outlier in that it sees a +37% jump on cruise days, suggesting this zone functions as a cruise staging area for excursions, tour pick-up, and a natural convergence of walking routes from the tenders at Ells Pier. This aligns with earlier consultancy work for the town and the Cruise Lines International Association, which identified the tender pier and adjacent streets as the main congestion hotspot created by cruise operations ("Cruise Tourism & Traffic Congestion in Bar Harbor," Operations & Maritime LLC, 2019).

TABLE 5: IMPACT OF CRUISE VESSELS ON DAY IN PORT (2-DAY MATCHED COMPARISON)

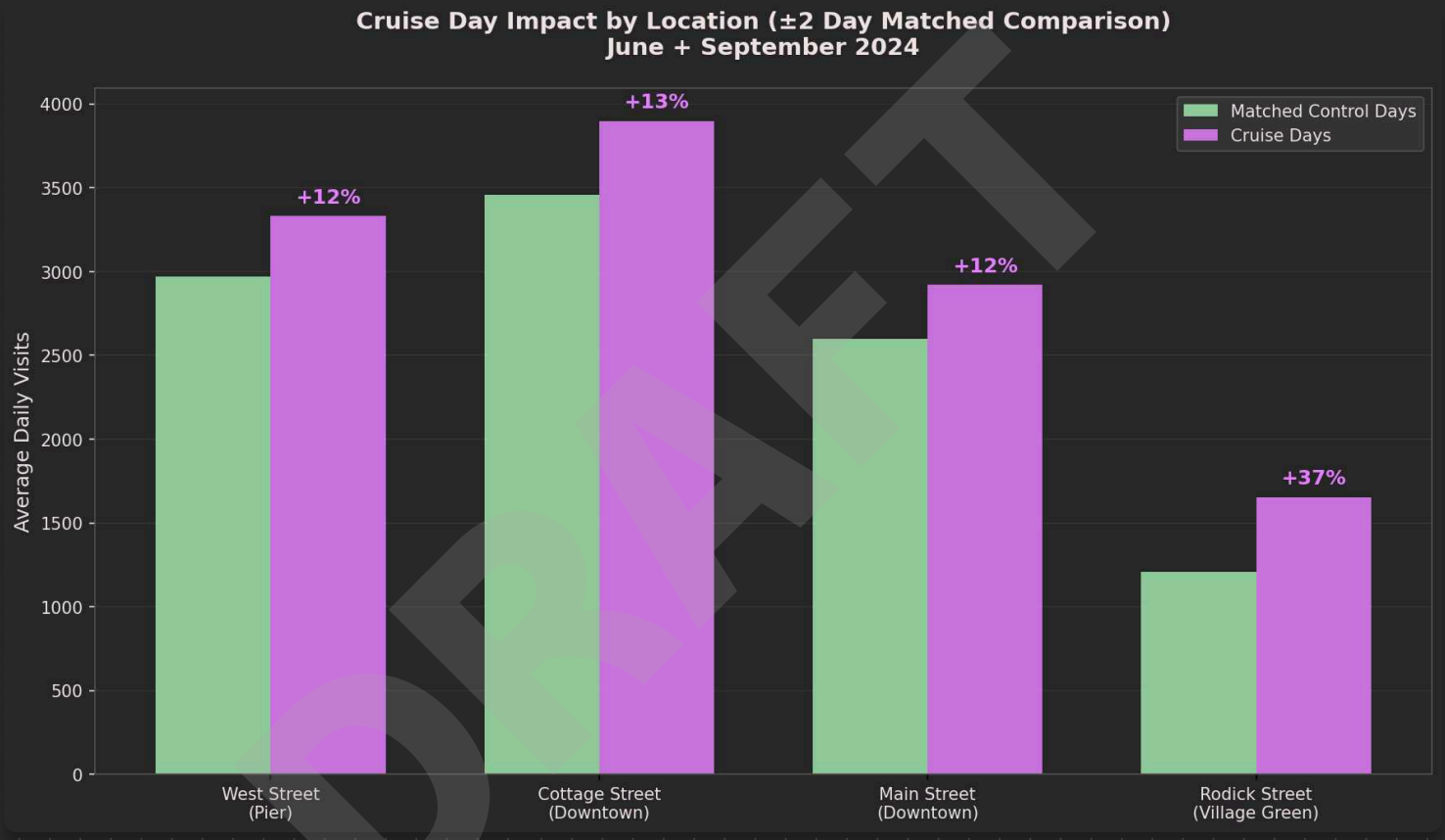


TABLE 6.1:MODELING FOOTFALL ON CRUISE AND NON-CRUISE DAYS, JUNE 2024

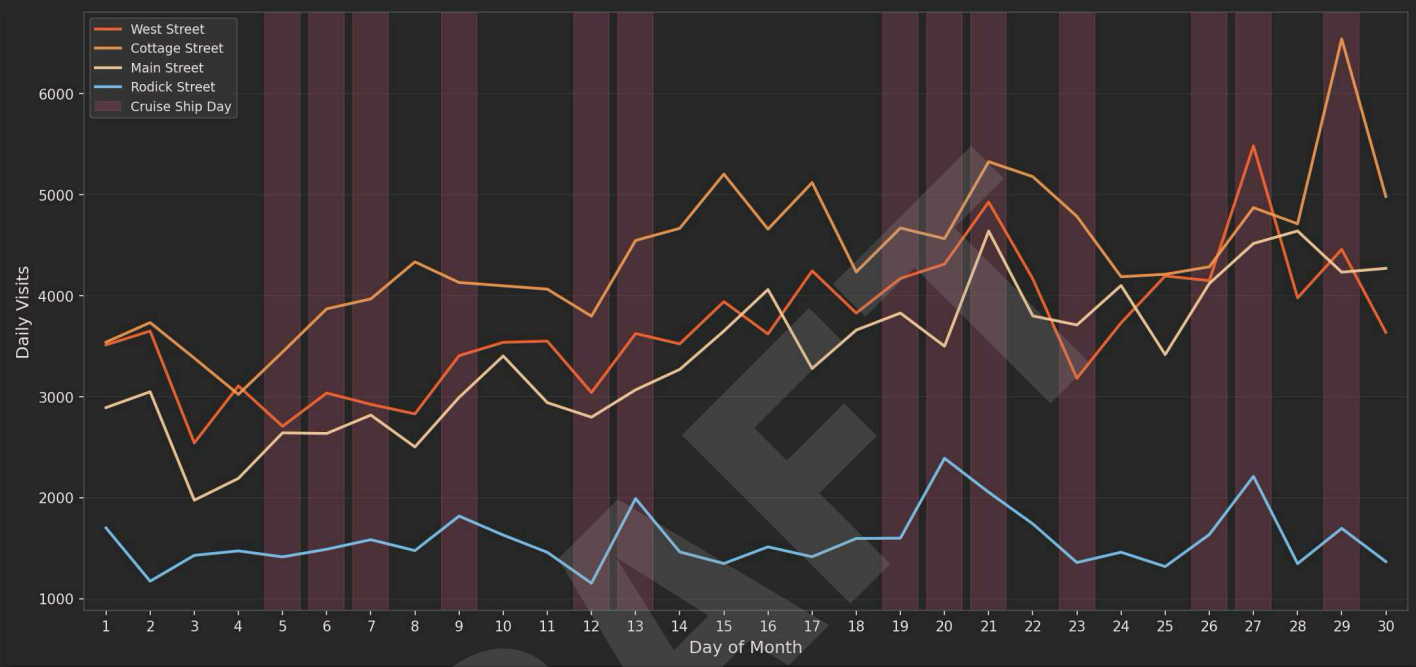
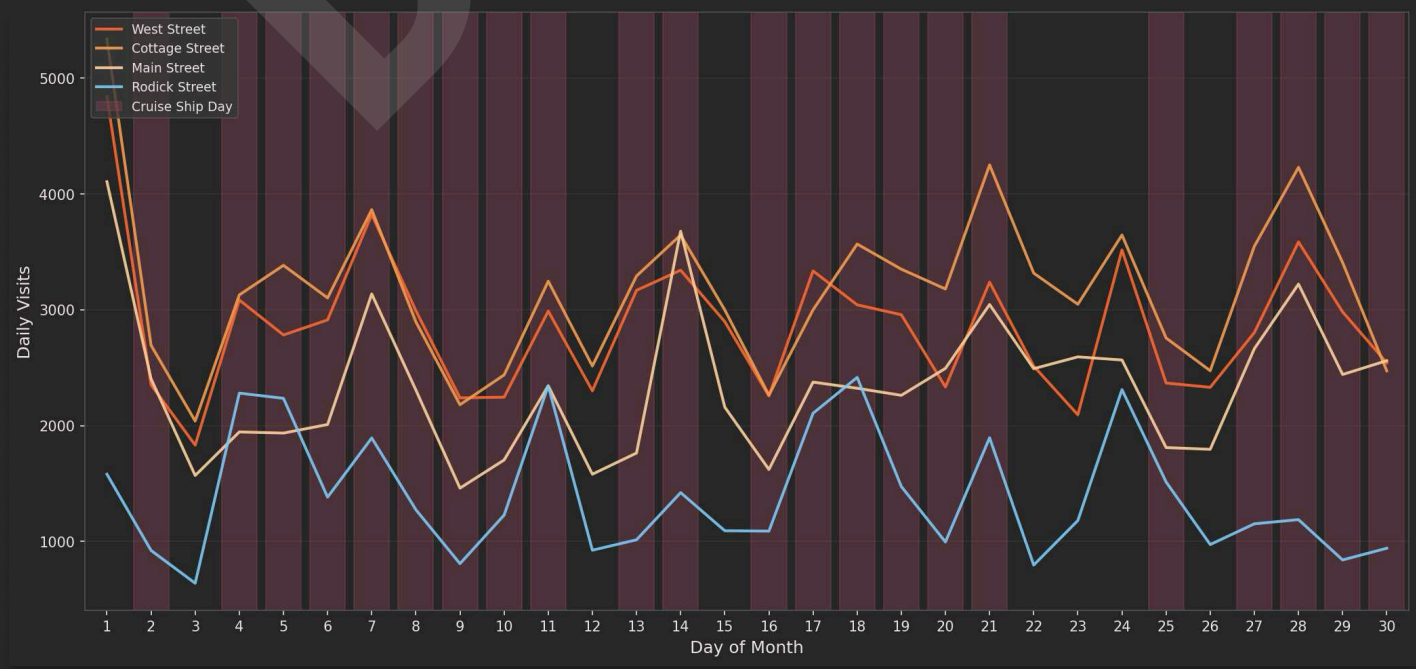


TABLE 6.2: MODELING FOOTFALL ON CRUISE AND NON-CRUISE DAYS, SEPT 2024



Finding #2: the cruise cap has offered some relief

From a sustainable tourism planning perspective, the key insight is that cruise ship operations have historically acted as short, sharp pulses of visitation layered on top of already strong land-based demand. The recent cruise cap appears to be reducing the surge levels seen across the Waterfront and Downtown.

The footfall data confirms that cruise ships do contribute to crowding in Bar Harbor—not just at the waterfront, but across the downtown grid. When vessels are in port, all four monitored zones see double-digit increases in visits, with the Village Green and Rodick Street area experiencing a 37% surge as it functions as a staging point for excursions and tour buses. As of 2025, with the cruise cap in effect, some of the pressure is easing. Early comparisons suggest lighter peak-day congestion along the waterfront, and the 2024–2025 trajectory shows a modest decline in West Street footfall even as other parts of downtown have grown.

If the cap is kept in place, the town should expect lighter crowds and less acute congestion, especially along the waterfront and Village Green. It will not, however, create radical change overnight. With that, there will come some erosion in day-of footfall for downtown businesses, which may result in marginal economic losses, unless it is replaced by other segments.

Finding #3: the cruise cap is not a silver bullet

Downtown Bar Harbor—particularly Cottage Street and Main Street—recorded strong growth in 2025, with June and September footfall up nearly 14% year-on-year. Record-breaking days occurred throughout the summer. Acadia visitation continues to climb. Maine's tourism sector is growing, if not in real numbers, but in spending. In other words, the forces driving crowds to Bar Harbor are macroeconomic, sustained, and largely independent of any single driver or industry. Even if no cruise ship ever called again, the town would likely still face acute seasonal pressure, waterfront bottlenecks, and the challenge of a small community absorbing visitor volumes that rival mid-sized urban destinations.

Planning implications

What happens after the cruise cap

No single policy will reshape crowds entirely. Cruise is one input into a complex system. What the data supports is a cumulative approach: multiple interventions, each calibrated to a specific pressure point, working together over time. The cruise cap may relieve intensity at the margins; investments in transit and wayfinding may spread visitors more evenly; shoulder-season programming may reduce the gap between August's peaks and February's troughs. Taken together, these measures can shift Bar Harbor toward a more balanced, resilient tourism model. Taken alone, none of them will.

- Addressing overcrowding sustainably will require attention to land-based arrivals, vehicle access, parking policy, Acadia coordination, short-term rental patterns, event programming, and—critically—the town's ability to extend viable economic activity into shoulder and off-peak seasons.
- Cruise ship visitation prior to 2025 resulted in sharp spikes in traffic. The footfall data shows a correlation between spikes in crowds along the Waterfront and Downtown on days that cruise ships are in port.
- The cruise cap has eased crowding across all of Bar Harbor. The data suggests that the Waterfront pressure has eased and may support a gradual reshaping of demand. The areas that appear to be benefitting the most from the cap will be the Waterfront, with Downtown seeing a 12-15% reduction.
- The cruise cap is one input in a larger, complex system. With most models suggesting that land-based tourism is set to increase over time, visitation growing, and Acadia setting new records, policy attention should now shift toward the broader system of visitor management of land-based tourists.
- Focus strategic energy on seasonality. The data shows that seasonal compression, as opposed to any single sub-sector or industry - is the structural driver of crowding. More than 85% of economic activity and the most extreme footfall peaks occur between May and October. Expanding viable shoulder-season activity (particularly in October, where downtown engagement is already strong) offers the greatest long-term opportunity to reduce pressure without sacrificing economic vitality.
- Invest in dispersal, not just restriction. Wayfinding, transit (including expanded Island Explorer service), and event programming can help redistribute visitors across space and time. The goal is not simply to reduce numbers, but to spread benefits and burdens more evenly, so that no single block, street, or season bears a disproportionate load.

Economic Impact

Understanding crowds in Bar Harbor

Economic context

Growing dependency on travel and tourism

Bar Harbor's economy is highly dependent on travel and tourism. As the primary gateway to Acadia National Park and one of Maine's most recognizable coastal destinations, the town's economic structure has been shaped over decades by visitor demand: where businesses locate, what kinds of jobs exist, when income is earned, and how public revenues are generated.

This makes tourism's economic impact unusually visible. When visitor numbers rise, the effects show up quickly in employment, sales, and tax receipts. When demand softens, even modestly, the effects are felt just as quickly by businesses, workers, and municipal finances. Unlike larger or more diversified economies, however, Bar Harbor has limited capacity to absorb shocks or smooth volatility through alternative sectors.

The purpose of this section is not to measure the conceptual benefits of travel and tourism – these have already been well documented. Instead, it is to assess the dependency, exposure, and trade-offs that come with the town's dependency on travel and tourism.

Methodology

To ground the analysis in observable behaviour rather than stated intent or survey responses, this chapter relies primarily on taxable sales data at both the Bar Harbor Economic Summary Area (ESA) level and, where available, the town level. Sales tax data captures real spending across a wide range of sectors and time periods and provides a consistent lens through which to examine long-term growth, sectoral composition, and seasonal concentration.

Rather than treating tourism as a single headline number, the analysis focuses on:

- Long-run economic trajectory (pre- and post-COVID),
- Sectoral composition (which activities drive value),
- Seasonality and revenue compression, and
- Recent softening in context (local dynamics versus macro-level forces)

The purpose is not to estimate a precise "tourism GDP" figure, but to understand how money actually moves through Bar Harbor's economy and what that implies for resilience, risk, and policy design.

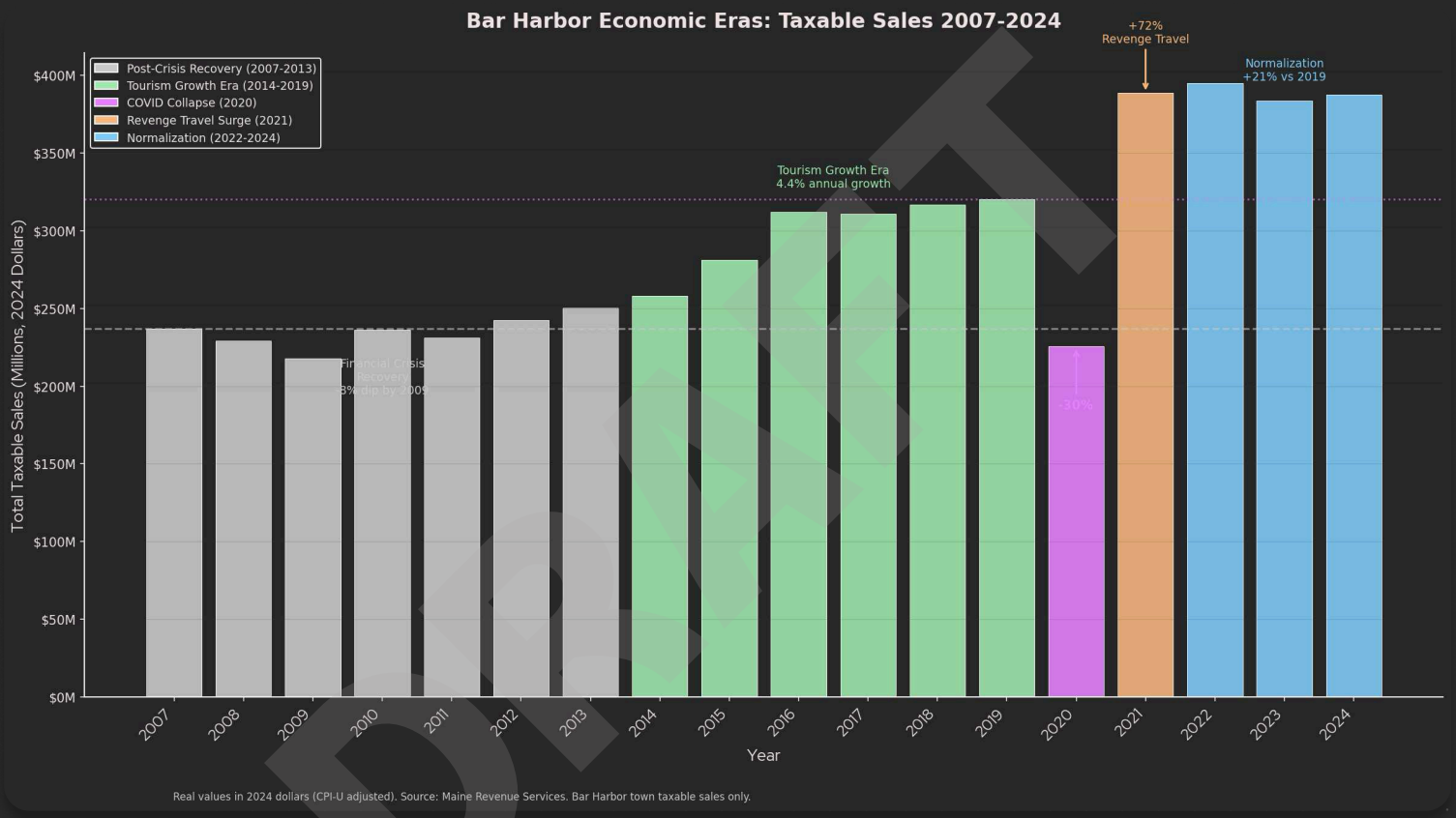
Detailed discussion of data sources, imputation methods, ESA boundaries and modeling assumptions (including IMPLAN-related considerations) that relate to the entirety of this chapter has been provided in Annex 1.

The story of growth

In 2024, the Bar Harbor Economic Summary Area (ESA) generated about $518.6 million in taxable sales (in real 2024 dollars), up 40.8% since 2007. Given that inflation accounts for roughly half of all nominal gains, the rise in taxable sales appears to represent genuine, real economic growth. The long-run trajectory since 2007 shows four distinct phases that line up neatly with national and state narratives.

1. The 2007–2013 period is a slow recovery from the global financial crisis, with taxable sales dipping almost 12% from 2007 to 2009 and only regaining their baseline after seven years.
2. The 2014–2019 "growth era" sees steady expansion on the back of increasing Acadia visitation and broader Maine tourism growth, with a real compound annual growth rate of about 2.6%.
3. The 2020–2021 period appears to reflect the post-COVID 'shock-then-surge': a 24.4% collapse in 2020 followed by a 61% rebound in 2021. This was considered to be a period where "revenge travel", remote work, and the appeal of outdoor destinations drove unprecedented demand, driving sales 20% above their pre-COVID peak.
4. From 2022–2024, the data show a normalization: totals drift a few percentage points below the 2021 high, then return to modest growth, leaving the economy about 18% larger in real terms than in 2019.

TABLE 7: BAR HARBOR ECONOMIC ERAS, TAXABLE SALES 2007-2024



Real values in 2024 dollars (CPI-U adjusted). Source: Maine Revenue Services. Bar Harbor town taxable sales only.

Findings

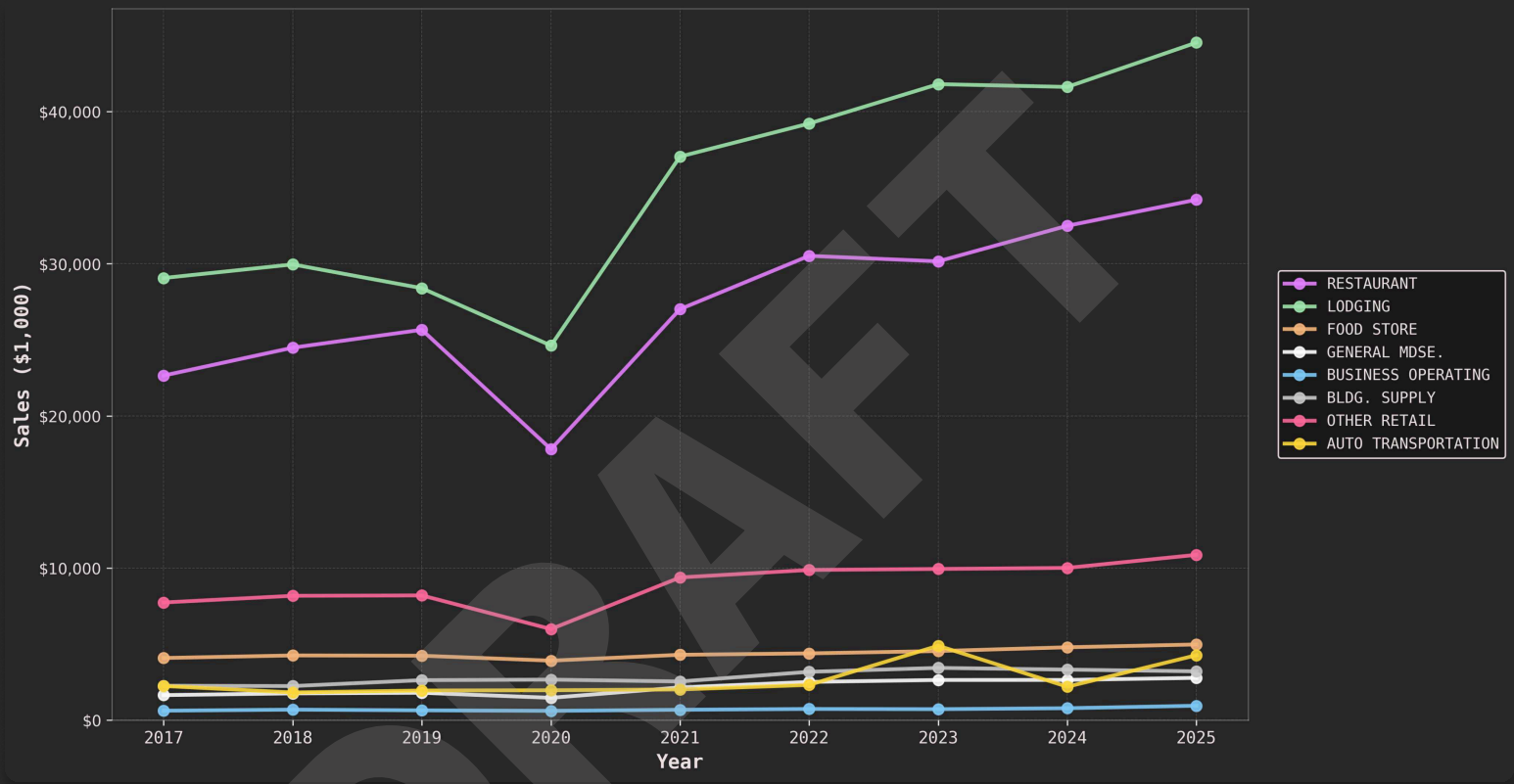
Finding #1: a two-sector economy

What stands out is not just the scale of economic activity but its composition. The core tourism sectors of lodging and restaurants account for roughly two-thirds of all taxable sales. This concentration is far higher than in non-tourism communities.

To put this in perspective, consider Skowhegan, a Maine town of 8260 people, without a major tourism draw. When comparing these two economic summary areas, Bar Harbor enjoys what might be called a “tourism premium” of 45–55% in overall economic activity. In lodging for example, Bar Harbor's revenue is roughly 46 times larger than Skowhegan's, and per capita taxable activity is more than double.

The sales tax data confirms that tourism has made Bar Harbor significantly wealthier than it would otherwise be. The economy proved resilient to the COVID shock and, even after cooling from 2021's highs, remains stronger than in previous years. At the same time, this data underscores how narrow the economic base really is. Two categories dominate sales tax revenue, and both are tightly coupled to a six-month window and to broader forces largely outside local control: climate, school holiday schedules, visitor sentiment, national park demand, and macroeconomic conditions.

TABLE 8: BAR HARBOR ECONOMIC SUMMARY AREA (ESA), AUGUST, 2017-25 - ALL ECONOMIC SECTORS



Finding #2 revenue compression from seasonality is a structural risk

In 2024, 84.8% of all taxable sales occurred between May and October, with over half of the year's revenue compressed into just three months (June through August). This extreme concentration creates what economists call “revenue compression”. Businesses must earn a year's income in five or six months while carrying fixed costs through a winter that barely registers in the tax base.

Unsurprisingly, the most extreme of the seasonal swings occurs in lodging. August taxable sales are 116x greater compared with February. Restaurants, the second largest category for seasonality, see a more than 40-fold swing between peak and shoulder months.

Finding #3: overnight stays carry major economic implications

Within this pattern, the economy skews toward overnight visitors. Real lodging revenue rose from about $143 million in 2019 to $181.5 million in 2024 (a 27% increase), while restaurants grew more steadily from $134.2 million to $156.9 million (17%). Lodging is both larger and more volatile than restaurants. This suggests that changes to overnight visitor numbers may have a proportionally greater economic impact on the local economy than shifts in day-trip visitation, highlighting the importance of policies that support and sustain this segment.

TABLE 9.1: TOTAL ECONOMIC ACTIVITY, BAR HARBOR ESA, 2025-ADJUSTED

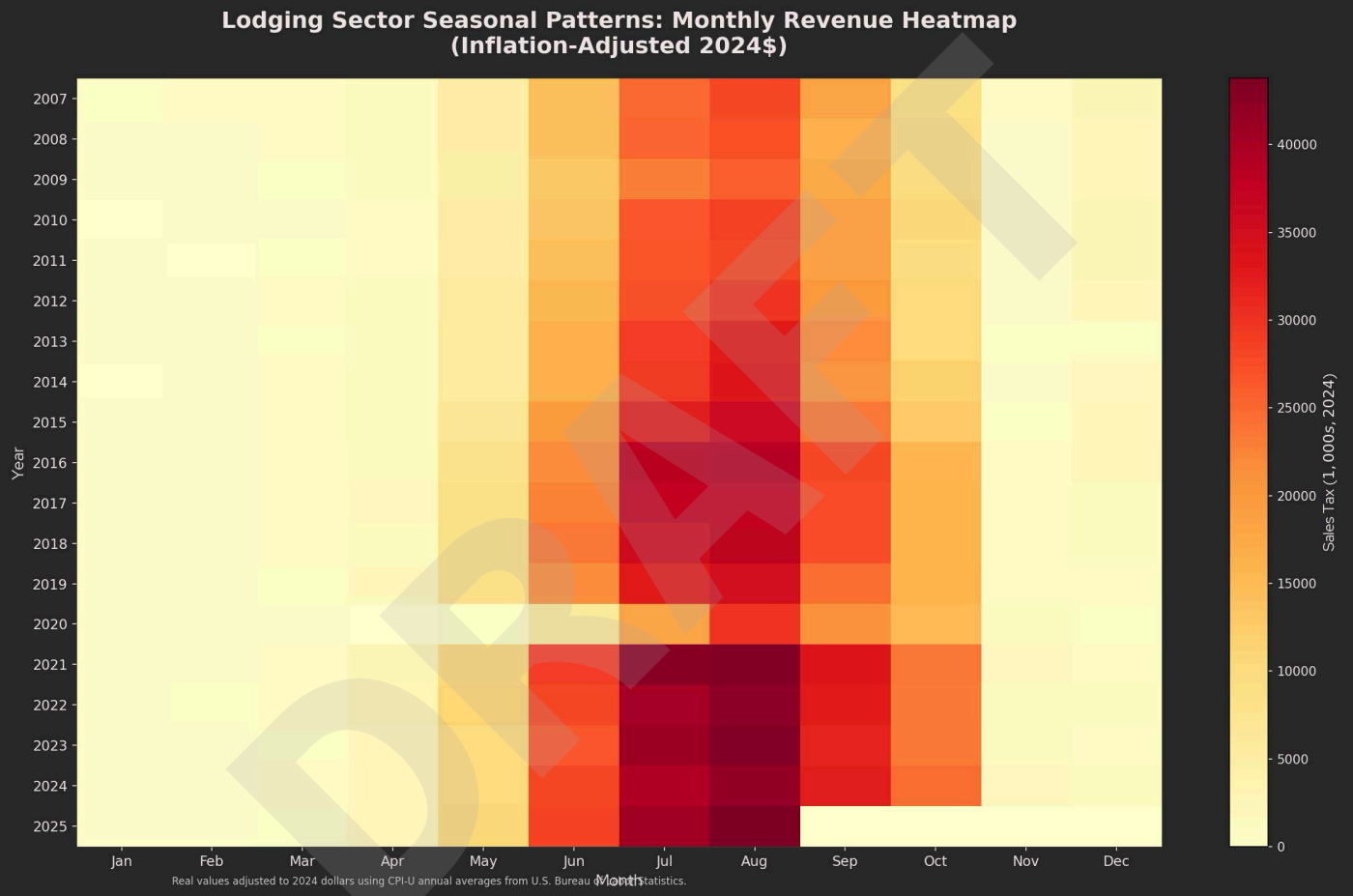
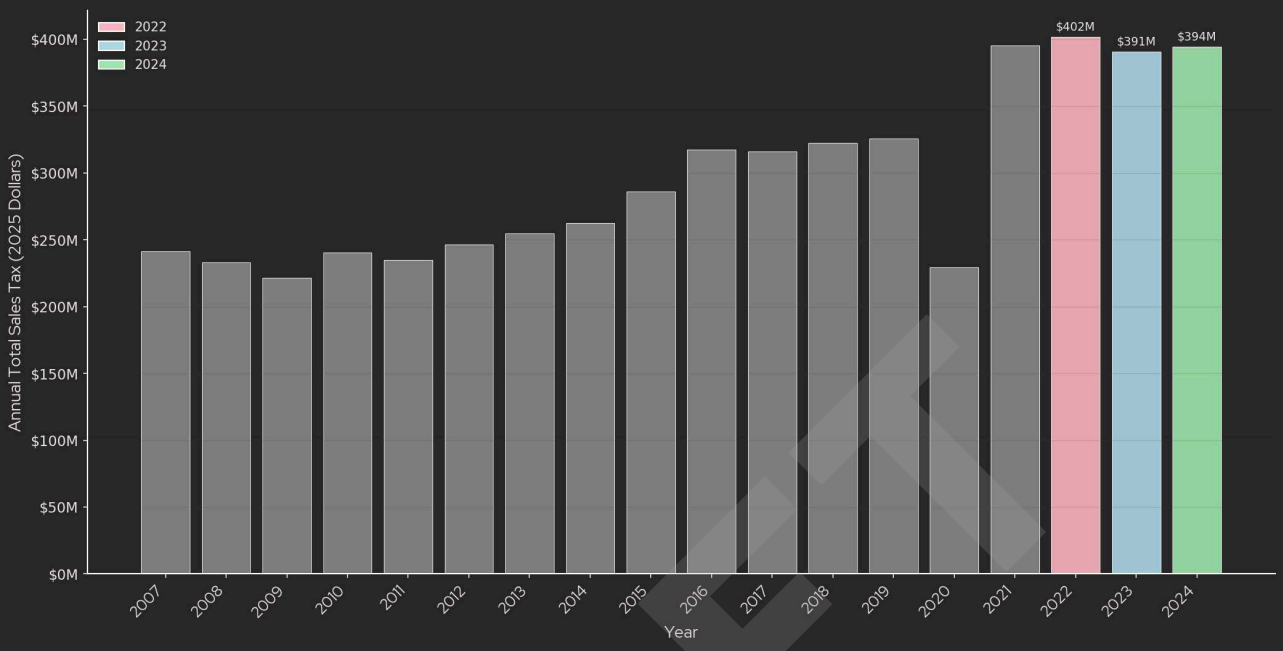
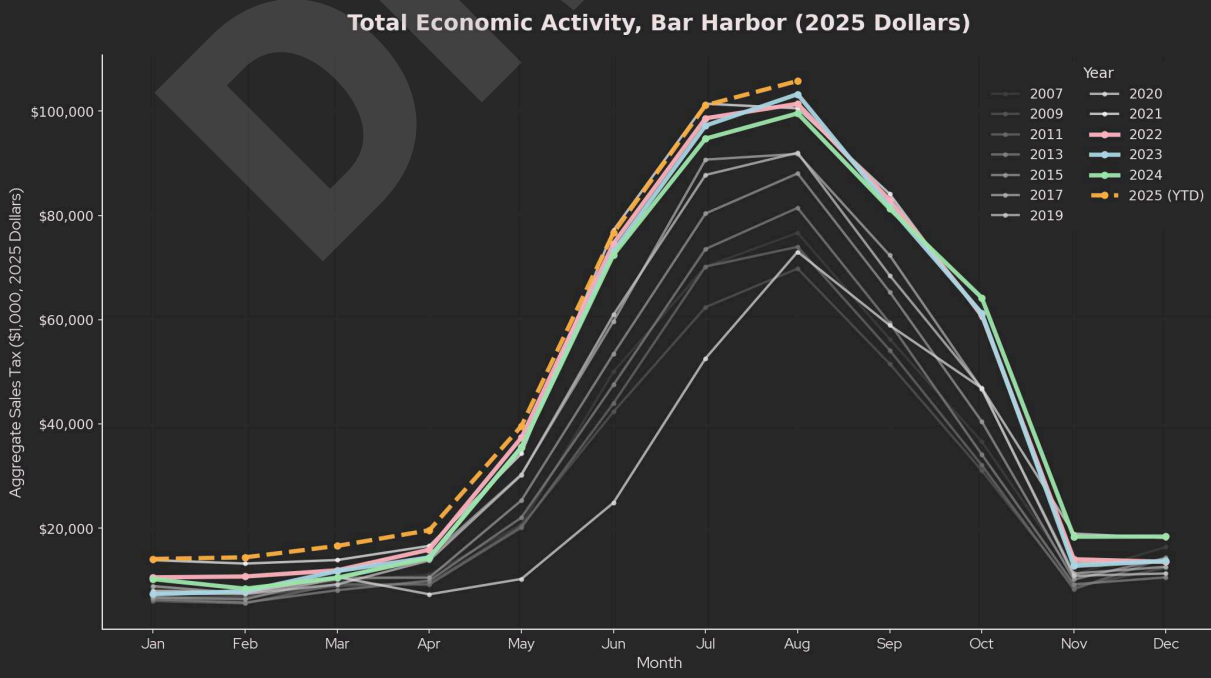


TABLE 9.2: TOTAL ECONOMIC ACTIVITY, BAR HARBOR ESA, 2025-ADJUSTED FOR INFLATION



Real values adjusted to 2025 dollars using CPI-U annual averages from U.S. Bureau of Labor Statistics. 2025 CPI projected. Source: Maine Revenue Services.

TABLE 9.3: TOTAL ECONOMIC ACTIVITY, BAR HARBOR ESA, 2025 DOLLARS



Real values adjusted to 2025 dollars using CPI-U annual averages from U.S. Bureau of Labor Statistics. 2025 CPI projected. 2024-2025 estimates use hybrid imputation.

DESPITE MACRO ISSUES, BAR HARBOR IS SEEING YEAR-ON-YEAR GROWTH

Finding #4: affordability and inflationary pressures weaken demand

Tourism is a discretionary spend that is sensitive to changes in household incomes and prices. As cost of living rises and real incomes are squeezed, this type of discretionary spending is typically cut back. So, as the phenomenon of 'revenge travel' (where households take vacations 'at any cost' as quarantine and distancing restrictions eased) faded, US households faced persistent inflation, higher interest rates and rising housing and insurance costs. Even as inflation cooled, analysts in travel and tourism have observed US travelers taking fewer trips and spending less in destination in the last 12 months.

Bar Harbor is overwhelmingly a domestic drive-market destination, while Maine in general draws 80% of visitors by car. This exposes the town to more significant cuts, as families are more likely to cut their long-weekend in Maine than their annual vacation to the Caribbean as daily expenses bite. Against that backdrop, a modest softening in visitor volumes or peak-season spending is entirely consistent with macro affordability pressures, without needing a local "shock" to explain it.

Finding #5: Maine Tourism's strategy appears to be taking effect

The statewide data show a clear pattern that predates, and sits above, Bar Harbor's local dynamics. According to the Maine Office of Tourism's 2024 Economic Impact Highlights, total visitation fell from 15.27 million visitors in 2023 to 14.80 million in 2024 (-3.1%), even as direct visitor spending rose from $9.07 billion to $9.23 billion (+1.8%). Average spend per visitor increased by 5% to $624, and room-nights in paid accommodation actually grew (+0.8%). Put simply: Maine is hosting fewer visitors, but those who do come are generally staying in paid accommodation and spending more per trip. This reflects the strategic planning of Maine Tourism in pursuing "higher-value visitors".

Bar Harbor's sales tax profile fits comfortably into this narrative. At the ESA level, total taxable sales in real 2024 dollars rose from about $510.7m in 2023 to $518.6m in 2024 (+1.5%), and sit roughly 18% above 2019. Despite a slight softening in peak months (May–September 2024 slightly below 2023), there are improvements in shoulder and off-season months (November and December 2024 up 34-44% year-on-year). This aligns with the footfall analysis above, which highlights how downtown zones maintain or see growth in visitors – with 2025 setting new records in several locations – even as the Waterfront and cruise-adjacent areas see slight year-on-year declines.

Finding #6: limited international exposure (for now)

On top of domestic affordability, tourism in Maine is facing international headwinds beyond the control of any destination. The Maine Office of Tourism noted that although Canadians comprised just 5% of all visitors in 2024 (roughly 798,000 people), they represented a visitor spend of almost $498m. Recent data from the US Customs and Border Protection show a sharp drop in land-based crossings from Canada into Maine, down between 25-35% when comparing the same months in 2024 and 2025. This decline is linked to the combination of strong US dollar, higher travel costs, and a deterioration in US-Canada political relations, including new tariffs and rhetoric that has prompted calls in Canada to avoid US destinations entirely.

This dynamic is reflected in Google Search Trend analytics. When looking at search terms 'Bar Harbor' and 'Acadia National Park' from within Canada, interest post-COVID remained consistently high up until 2025, after which it fell off precipitously, by as much as 50%.

TABLE 10.1: SEARCH TREND SCORE WITHIN CANADA FOR “BAR HARBOR” 2020-25

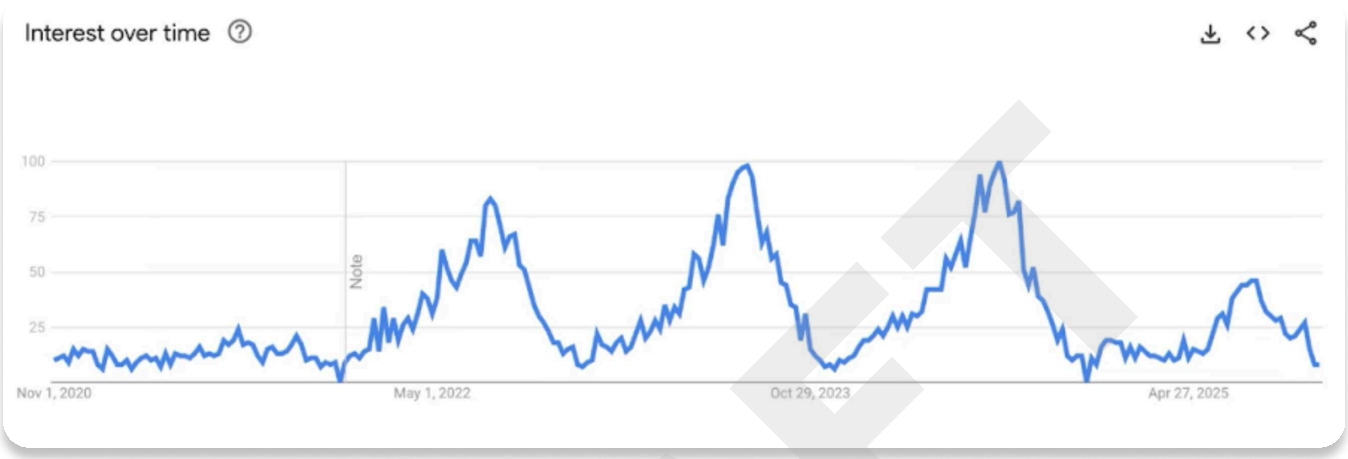
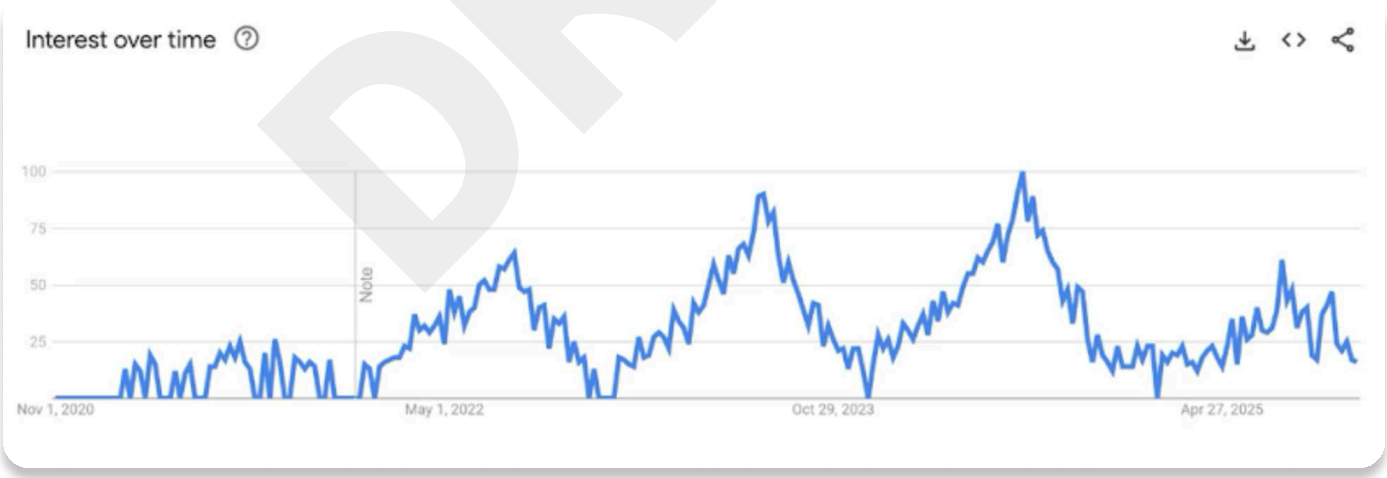


TABLE 10.2: SEARCH TREND SCORE WITHIN CANADA FOR “ACADIA NATIONAL PARK”, 2020-25



Finding #7: recent local ordinances have not resulted in major economic shifts

If local policies alone were the drivers of a structural downturn, then there would be a clear, lasting break in the data from 2024 onwards visible in both the footfall and sales tax data.

Instead, the data shows [Table 9.2, Page 51]:

- No 2024 collapse: Real taxable sales across the ESA increased modestly in 2024 (+1.5%), even as Maine as a whole saw visitor numbers fall 3.1%
- Peak-season softening, not free-fall: Summer months in 2024 were slightly below 2023, but this was offset by improved shoulder and winter growth
- Record-breaking 2025: By August 2025, Bar Harbor ESA had already logged a 12.2% increase in Jan–Aug taxable sales vs 2024, with August 2025 setting a new all-time record (over $104m in real 2024 dollars) and lodging at its highest level on record.
- Footfall resilience: Multiple sensors in the downtown core show 2025 daily averages exceeding both 2023 and 2024, while the most cruise-sensitive zones (waterfront and Village Green) show more modest growth or slight declines.

The recent softening between 2023 and 2024 needs to be read in the context of the decline of “revenge travel”, national affordability pressures, a deliberate state-level pivot toward higher-spending, lower-volume visitors, and international headwinds such as reduced Canadian cross-border trips. In fact, despite all of the above, at the economic summary area level, real taxable sales grew modestly (+1.5%) and remained well above pre-COVID levels, which again is in line with the State-level narrative of visitor volumes falling slightly, while spend per visitor rises.

As of 2025, partial data show a strong rebound for tourism in Maine, with record August revenues and new peaks in lodging. In other words, the data point to a reshaping and redistribution of demand, not a structural collapse, and there is little evidence that the cruise cap or Vacation Rental-1 and Vacation Rental-2 rules are the primary drivers of recent dynamics.

Planning implications

What the footfall analysis means for planning purposes

Taken together, the sales-tax analysis shows a town that is wealthy because of tourism, but structurally narrow and highly exposed. In real terms, Bar Harbor's economy is about 40% larger than in 2007 and roughly 18% above 2019, and the ESA sailed through COVID with a classic shock-and-surge pattern before settling into modest growth. That strength is overwhelmingly driven by visitor spending: lodging and restaurants alone account for roughly two-thirds of taxable sales, and compared with a non-tourism baseline like Skowhegan, Bar Harbor enjoys a 45–55% "tourism premium" in activity and more than double the per-capita taxable sales. Tourism has made the town significantly richer than it would otherwise be.

The same data, however, highlight structural vulnerabilities that any Sustainable Tourism Master Plan has to confront directly. Around 85% of all taxable sales are compressed into May–October, with over half of the year's revenue arriving in just three months, and an August lodging peak more than 100 times higher than February. That leaves businesses trying to earn a year's income in five or six months while carrying fixed costs through a winter that barely registers in the tax base. The data reflects a strong accommodation-led economy, where lodging represents a significant and variable revenue stream. Overnight visitors are therefore a critical driver of economic activity, and maintaining this segment is important to the town's overall stability.

Below are the implications of the data analysis on the local economy:

Plan for a permanently tourism-dependent economy

Visitor spending will likely remain the town's main economic engine, shaped primarily by macro-economic dynamics, infrastructure and the town's existing tourism assets and proximity to metro areas.

Use tourism spending to support non-tourism or essential resident services, such as trades, healthcare, and education

This will provide a greater quality of life for residents, while also mitigating against any future shocks in the domestic travel and tourism economy.

Treat seasonality as a core economic risk

Consider policies that actively grow shoulder-season and winter activity (events, conferences, nature-based off-season offers, and winter festivals) that support businesses in smoothing cashflow across the year.

Align visitor-mix strategy with Maine's "higher-value visitor" trajectory

The state is already trading a small drop in visitor numbers for a rise in spend per trip. Bar Harbor is well-placed to grow the value of overnight tourism by attracting visitors who spend more time and money supporting local businesses. Taking a balanced approach — weighing visitor numbers against economic return and infrastructure impact — can help ensure tourism growth remains sustainable and beneficial for the whole community.

Design policies with sector sensitivity, especially around lodging

Because lodging is both the largest and most volatile sector, changes to cruise operations, STR rules, zoning or park access need to be assessed for their impact on overnight stays specifically. The Master Plan should include stress-tests showing how different policy choices might affect lodging and restaurant revenues, and thus the town's tax base, under various demand scenarios.

Use Bar Harbor vs. baseline comparisons to keep debates grounded

The Skowhegan and ESA comparisons demonstrate how much tourism has lifted Bar Harbor's economy above a non-tourism counterfactual, and how recent softening fits wider state and national patterns.

Carrying Capacity

Pushed to its limits

Why local capacity matters

For travel and tourism, carrying capacity determines whether the underlying system in a destination - from essential services like access to EMTs or trades to the viability of local ecosystems – can support the level of tourism activity the market throws at it.

When a system is under sustained pressure, residents are forced to travel elsewhere for basic services, employers struggle to staff roles, workers churn rapidly or leave, environmental threats and long-term impacts worsen, and the town becomes more dependent on a narrow, seasonal visitor economy that is itself vulnerable to shocks. The value of a carrying capacity analysis is that it asks: at what point does more tourism make the town worse off?

To capture the state of local capacity and the dynamics around carrying capacity, this section is divided into three parts:

1. Essential Services
2. Impacts of Seasonality
3. Housing & Lodging

Methodology

This chapter uses three proxies: (1) essential services/business mix using place-based business inventory within a consistent radius and normalized per 1,000 residents; (2) employment seasonality comparisons between Bar Harbor and control towns; and (3) housing and STR pressure using Bar Harbor licensing records (VR-1/VR-2) and benchmark datasets (e.g., InsideAirbnb) where available. Full methodology: Annex A2.

Essential services

Findings & analysis

Carrying capacity isn't just about how many visitors a town can hold in August; it's also about whether the place still works for the people who live there in February. Essential services like mechanics, trades, hardware stores, grocery shops, pharmacies, and personal care providers are what make everyday life possible for residents and workers.

Over the last few decades, particularly in tourism-dependent economies, high visitor spending and peak-season rents have distorted business compositions to the point where everyday, essential services miss out to tourism-focused businesses. Landlords and policy makers typically favor high-yield businesses, such as hotels, boutiques and restaurants over garages or supermarkets. Over time, this can leave locals travelling further for basic services, facing long wait times, or going without – pressures that are felt most acutely in the off-season, when visitor-facing businesses shut their doors but residents still need to fix a car, mend a roof, or buy groceries.

Finding #1: Tourism businesses dominate the commercial landscape

For every 1,000 residents, Bar Harbor has 2.4 times more tourism businesses than the control-town average (41 versus 17). This density reflects the economic logic of a destination that generates over half a billion dollars annually in taxable sales, with 65% coming from lodging and restaurants. In an environment where August alone turns over $100–105 million, it is entirely rational for capital to chase hotel rooms, restaurants, and visitor retail—because those uses can support far higher rents than a mechanic's workshop or a hardware store ever could.

TABLE 11: BAR HARBOR SERVICE SUPPLY VS. BASELINE

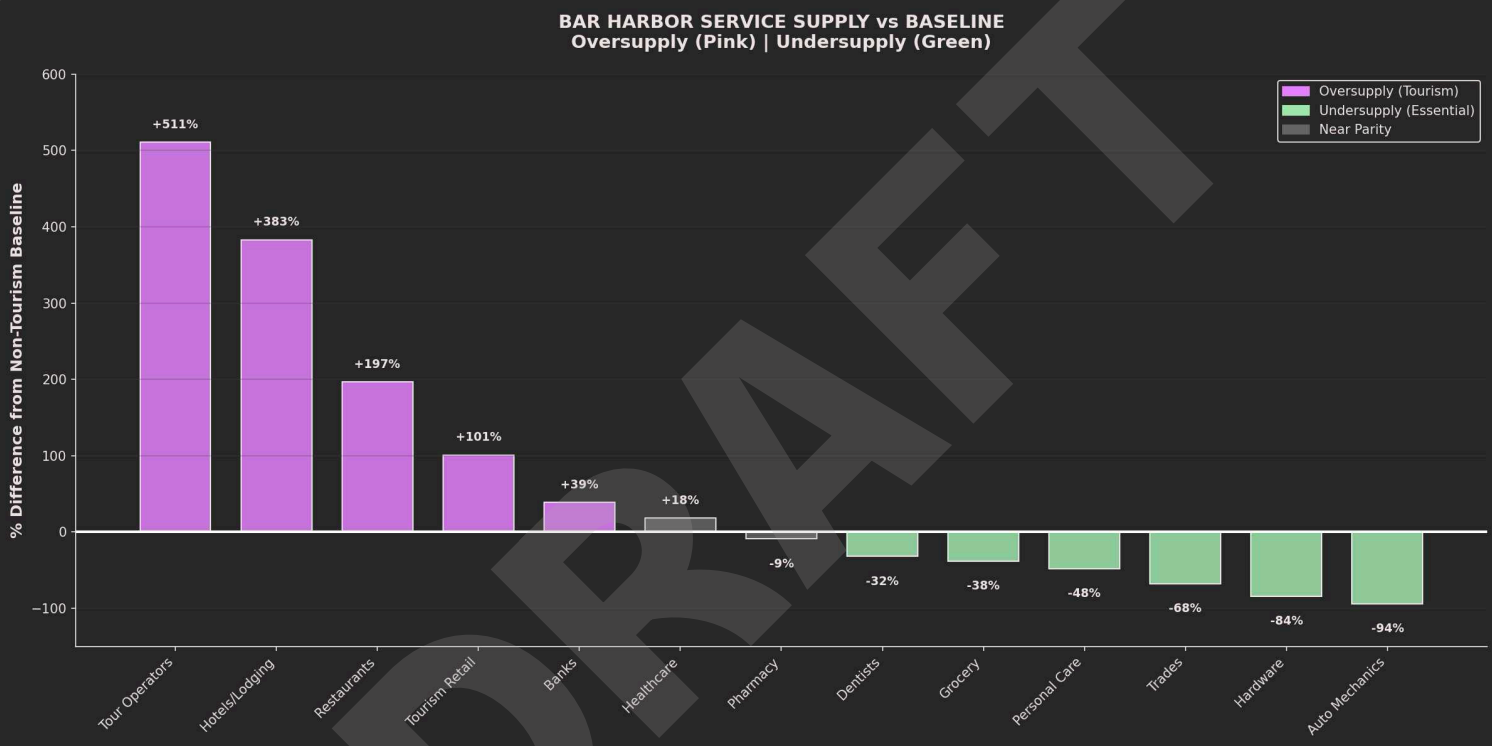


TABLE 12: TOURISM BUSINESS SUPPLY - MAINE TOWNS

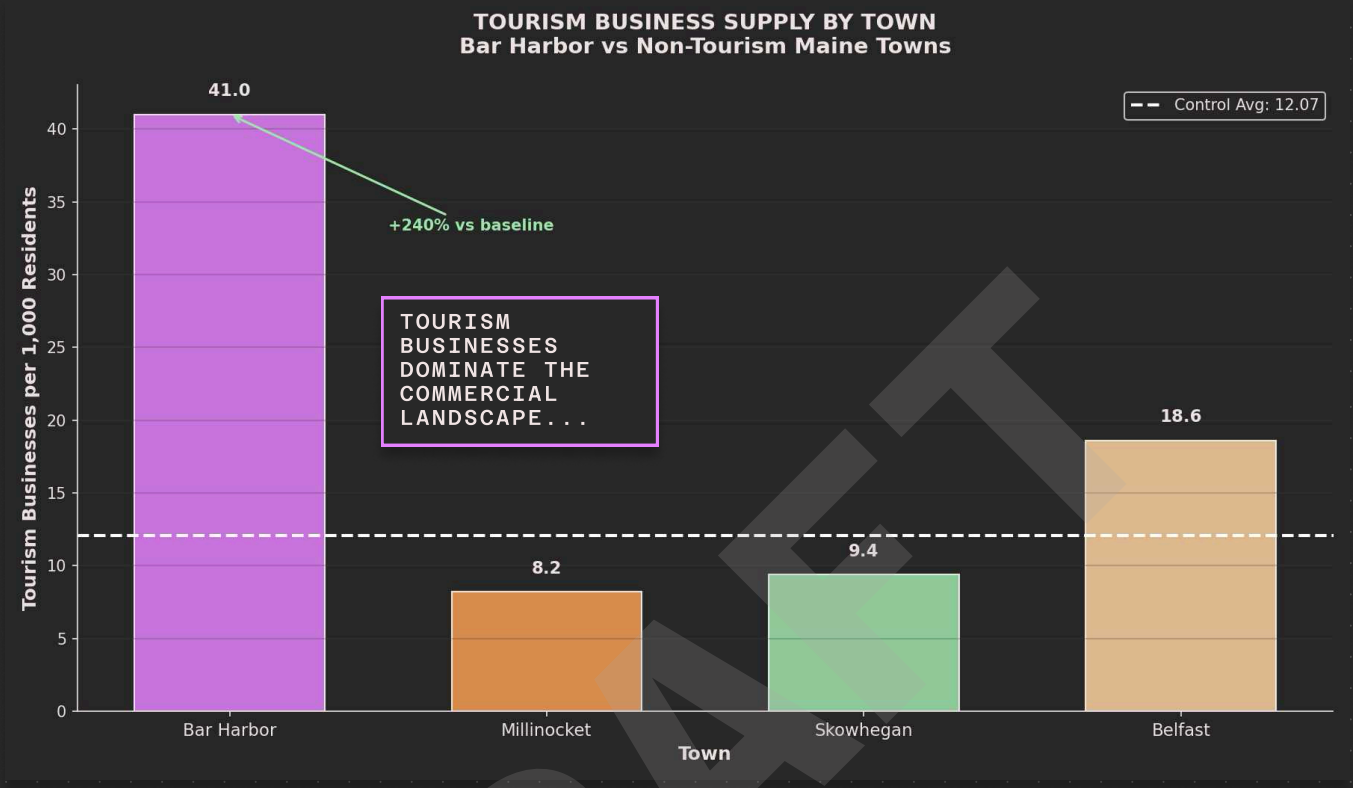
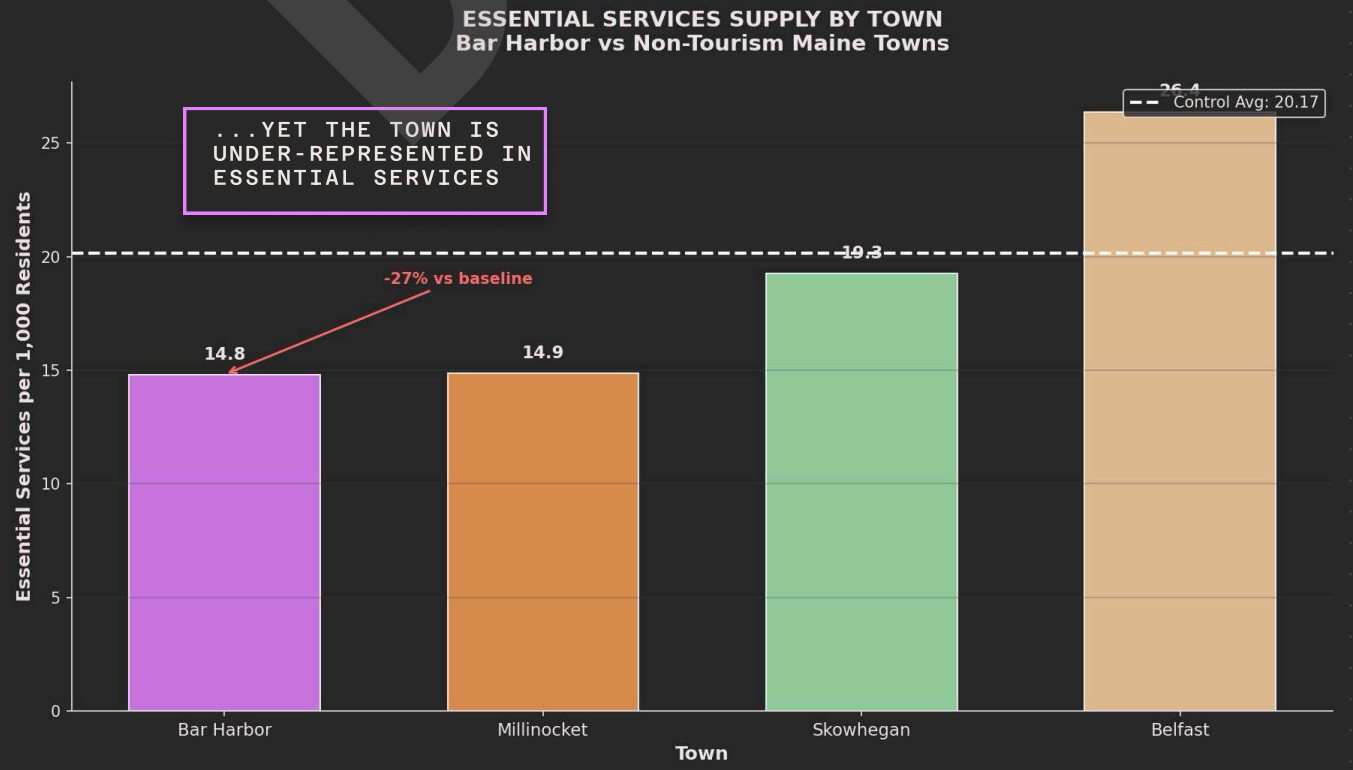


TABLE 13: ESSENTIAL SERVICES SUPPLY - MAINE TOWNS



Finding #2: Essential services are being crowded out

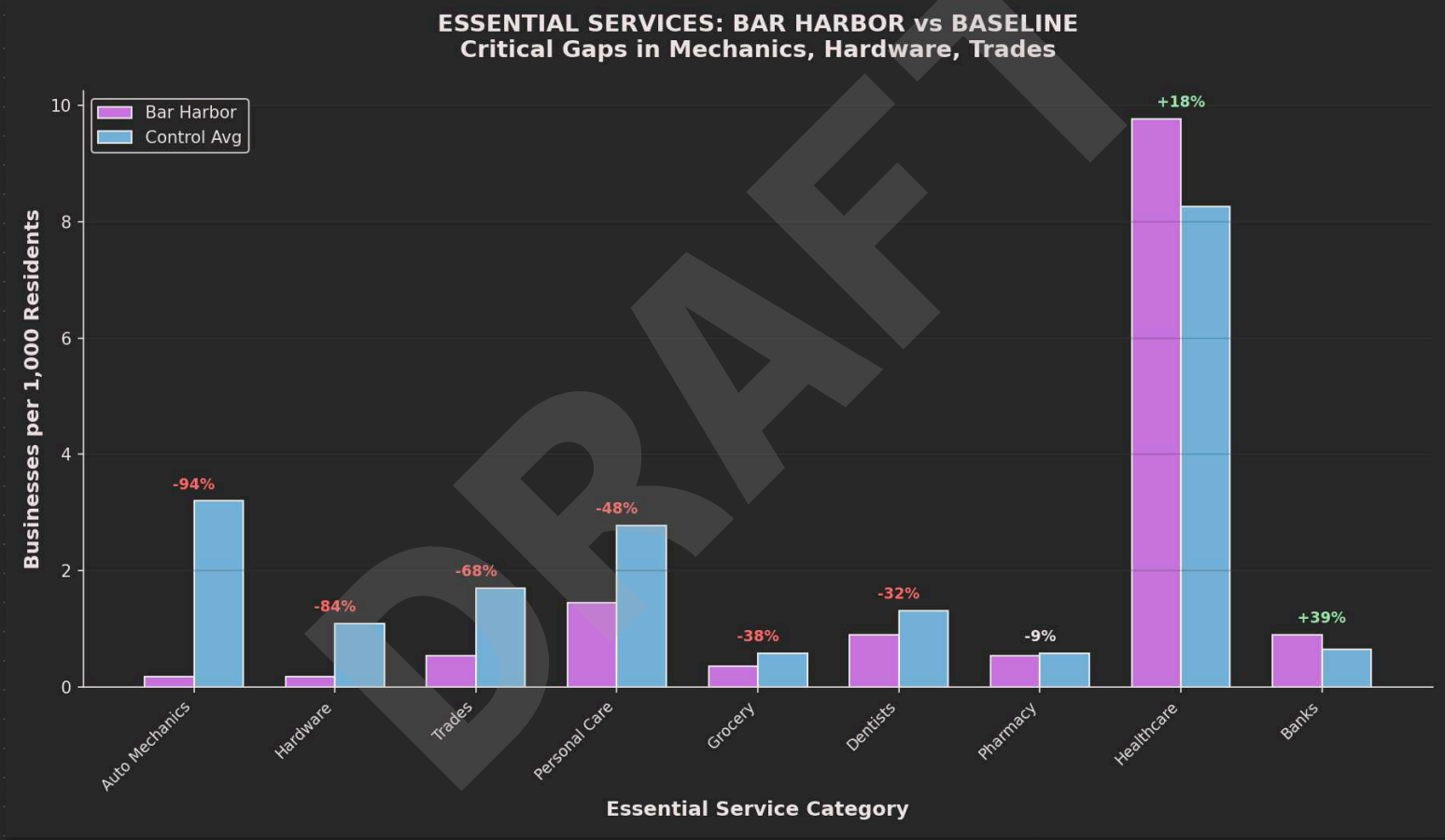
The flip side of that tourism density is a 27% shortfall in essential services compared to the control-town average (14.8 versus 20.2 businesses per 1,000 residents). Essential services are defined here as pharmacies, dentists, grocery stores, personal care, trades, hardware, and auto mechanics—the businesses that make everyday life possible for residents and workers.

The most acute gaps are in the categories that matter most to year-round quality of life:

- Auto mechanics: 94% fewer than the control average (1 mechanic versus 22)
- Hardware stores: 84% fewer (1 versus 7)
- Trades (electricians, plumbers, contractors): 68% fewer than the average
- Personal care: 48% fewer than the average

In practical terms, this means many routine tasks—fixing a car, sourcing parts for a home repair, finding an electrician, or a routine dental checkup—require long wait times, or trips to Ellsworth and beyond.

TABLE 14: GAPS IN ESSENTIAL SERVICES IN BAR HARBOR



Finding #3: Tourism investment is impacting the commercial landscape

There is a clear economic rationale for this business infrastructure dynamic: high tourism rents and returns make it rational for landlords to lease to gift shops, galleries and restaurants, and irrational for them to lease to childcare centers, healthcare, mechanics, trades, or hardware stores. From an investor's point of view, the ESA is generating over half a billion dollars a year in taxable sales, with 65% of that coming from lodging and restaurants, and August alone turning over close to $100–105 million in recent years.

In that environment, it is entirely rational for capital to chase hotel rooms, restaurants, and visitor retail, because those uses can support far higher rents and sale prices than a mechanic's workshop, a hardware store, or a local electrician's office ever could. A new boutique hotel can plausibly underwrite seven-figure investments where a small plumbing company cannot.

Finding #4: High-value land is sorting toward tourism uses

This imbalance is not accidental. It reflects a structural dynamic in tourism-dependent economies where high visitor spending and peak-season rents make it rational for landlords to favor high-yield tenants. When a commercial property comes to market, the bids on the table are effectively "restaurant versus hardware store" or "boutique hotel versus trades depot." In each matchup, the tourism business can justify paying more because it is geared to massive seasonal visitor spend, not year-round local budgets.

Over time, this dynamic acts as a sorting mechanism: high-visibility commercial space migrates toward visitor-facing uses, while lower-margin, resident-serving businesses are pushed to less accessible locations—or out of the town altogether. The pattern is well documented in other tourism-dependent places. Studies of Barcelona, Venice and New Orleans show that when tourism revenues and property values rise together, investors and landlords rationally prioritise hotels, short-term rentals and visitor-facing retail. High tourism rents and returns make it rational for landlords to lease to gift shops, galleries and restaurants, and irrational for them to lease to mechanics, trades or hardware stores.

Finding #5: Healthcare and banking have expanded, for visitors, not residents

Interestingly, Bar Harbor has more healthcare capacity (+18%) and banking services (+39%) than the control-town average. This likely reflects the needs of visitors and tourism businesses rather than an oversupply of resident services. Tourists need urgent care and ATMs; hotels and restaurants need commercial banking. These sectors have scaled with the visitor economy in ways that trades, mechanics, and hardware stores have not.

Planning implications

What the analysis of essential business means for planning

Bar Harbor's business composition increasingly reflects the needs of peak-season visitors, not the everyday demands of a year-round community. The town has 2.4 times more tourism businesses per capita than non-tourism towns, but 27% fewer essential services, with critical categories like mechanics, hardware, and trades well below the typical operating numbers of comparable towns and communities. This dynamic is felt by residents far more than tourists.

To be clear, this isn't a market or business failure on the part of auto-repair shops or grocery stores. It's the combination of extraordinary, seasonal demands of travel and tourism that drive capital flows and investment towards tourism businesses, and away from ancillary and non-tourism sectors. The result is a service ecosystem that works brilliantly for a summer afternoon but struggles to support locals who require plumbers, daycares, grocers, gardeners or electricians on a weekday afternoon in February.

Based on the business composition, Below are some considerations for the Sustainable Tourism Master Plan:

Treat essential services as critical tourism infrastructure

Recognise mechanics, hardware, trades, childcare, and groceries as part of what makes the visitor economy possible (you can't run hotels and restaurants without them), establish a risk management framework, and set minimum annual targets for operations framed as risk management for the local economy.

Protect commercial space for resident-serving uses

Explore zoning tools, mixed-use requirements, or overlay districts that reserve a portion of high-access, high-visibility commercial space for essential services rather than allowing all commercial frontage to be captured by tourism, retail and hospitality. In practical terms, that might mean "no net loss" rules for key categories, or designated areas where tourism uses are limited so that service businesses can survive.

Use incentives to level an uneven playing field

Because tourism tenants can pay more, consider modest but targeted incentives for essential services: reduced business rates, fit-out grants, long-term leases in town-owned properties, or preferential access to parking and loading.

Link business mix to workforce and housing strategies

The same dynamics that hollow out essential services also make it harder for workers to build stable lives locally. Coordinate commercial-space policy with housing and job-stability measures so that Bar Harbor doesn't end up with peak-season employment and visitor spending, but a service base and workforce that live and shop somewhere else.

Measure business composition and structure as a carrying-capacity indicator

Build a simple dashboard that tracks, year by year, the number of tourism vs essential businesses per 1,000 residents, along with wait times or travel distances for key services (mechanics, trades, healthcare, childcare). Use this as an early-warning system: if essential-service density falls below an agreed threshold, it should trigger policy responses in the same way that over-capacity traffic or park-use metrics would.

Impacts of Seasonality

Findings & analysis

On the surface, Bar Harbor is an attractive proposition for investment. When compared with Skowhegan, Maine for example, it generates roughly $510–$520 million a year in taxable sales versus about $380 million in Skowhegan. Despite having only about 60% of the population, Bar Harbor's per-capita economic activity is more than double Skowhegan's.

The reality is that these top-line numbers hide a structural issue in the town. As noted in the S6, once we subtract what a 'normal inland' economy would generate, over half of Bar Harbor's activity (~54.5%, or $270–$280 million) is revealed as a tourism premium, heavily concentrated into the six months from May to October. What counts for non-tourism businesses (those that do not benefit as much as tourism businesses from visitor spending) is that in the off-season, sales tax data show Bar Harbor falls below the Skowhegan baseline: November through April represent a combined "deficit" relative to what we would expect for a non-tourism town of the same size.

That has direct implications for carrying capacity from the perspective of residents and non-tourism operators. In Skowhegan, the year-round economy is lower but steadier: there is no summer boom on the scale of Bar Harbor's, but neither is there an economic cliff in November. Sectoral comparisons underline the point. Skowhegan outperforms Bar Harbor in general merchandise, building supply, auto transportation and business operating categories – the kinds of sectors that sustain mechanics, builders, trades, and everyday resident-serving businesses.

Bar Harbor, by contrast, is hyper-specialised: Bar Harbor has forty-six times the quantity of lodging establishments than in Skowhegan. Additionally, there are three times more restaurants in Bar Harbor than in Skowhegan, while core resident sectors sit well below baseline. In practical terms, this means that a mechanic or electrician in Skowhegan faces lower commercial rents, a more balanced customer base, and steadier year-round demand, while their counterpart in Bar Harbor must navigate sky-high peak-season costs, intense competition for space with tourism uses, and a winter market that shrinks below what would be "normal" for a town of this size.

Finding #1: Bar Harbor's off-season economy is weaker than non-tourism towns

Once the tourism premium is stripped out, Bar Harbor in the off-season is not a particularly strong market for resident-serving businesses. Sales tax data show that from November through April, Bar Harbor actually runs a combined "deficit" relative to what we would expect for a non-tourism town of the same size. Skowhegan, by contrast, has a lower but steadier year-round economy.

Finding #2: Running a non-tourism business is hard in Bar Harbor

Seen through this lens, tourism's contribution is double-edged. The summer visitor wave brings a huge, short-lived injection of spending that makes hotels, restaurants and tour operators highly attractive investments, and justifies higher land values and rents. The same dynamics, however, make it progressively harder for non-tourism businesses to survive on the island at all.

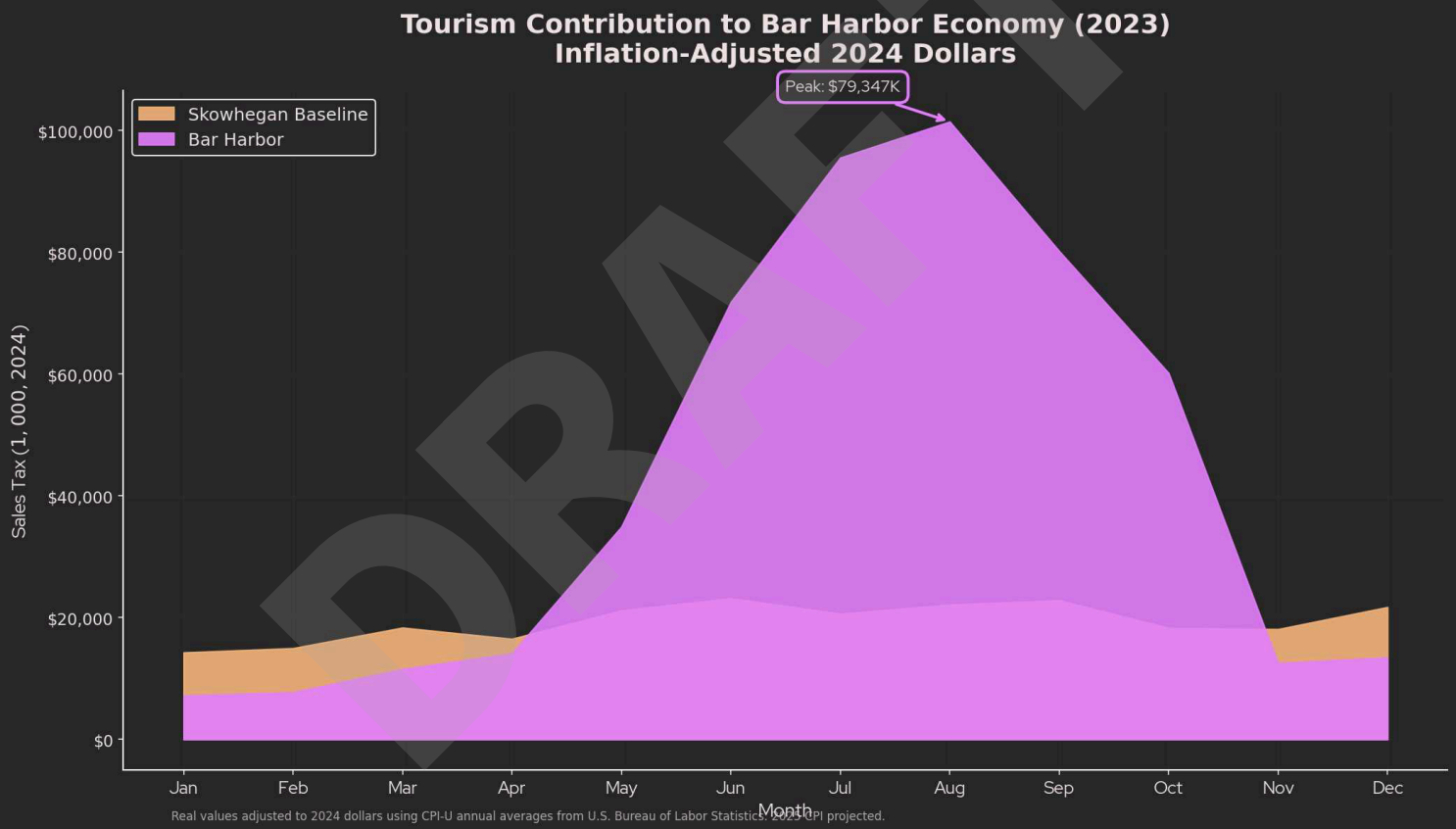
Once the visitor premium is stripped out, Bar Harbor in the off-season is not a particularly strong market for resident-serving services; yet those services are paying property and labor costs inflated by a tourism economy that largely disappears for half the year. From a carrying-capacity standpoint, this suggests that in the long run it may be easier to operate a mechanic's shop or small trade business in a place like Skowhegan than in Bar Harbor – even though Bar Harbor, on paper, is the far "richer" town.

Finding #3: Employment nearly doubles between winter and summer

While tourism generates a significant number of jobs, nearly half of them only exist for a few months each year. Between Q1 and Q3, total employment in Bar Harbor jumps from around 3,700 jobs to just over 7,000 - a 72% increase. By contrast, the comparison towns add fewer than 200 jobs over the same period, a change of roughly 4 to 6%. Bar Harbor's labor market is not just seasonal; it is defined by seasonality in a way that non-tourism towns simply are not.

TABLE 15: TOURISM CONTRIBUTION TO BAR HARBOR ECONOMY - 2023

FOR MUCH OF THE SEASON, BAR HARBOR OUTPERFORMS SKOWHEGAN...



...YET IN THE OFF-SEASON, BUSINESS IS BETTER IN SKOWHEGAN

Finding #4: Seasonal jobs are growing faster than year-round jobs

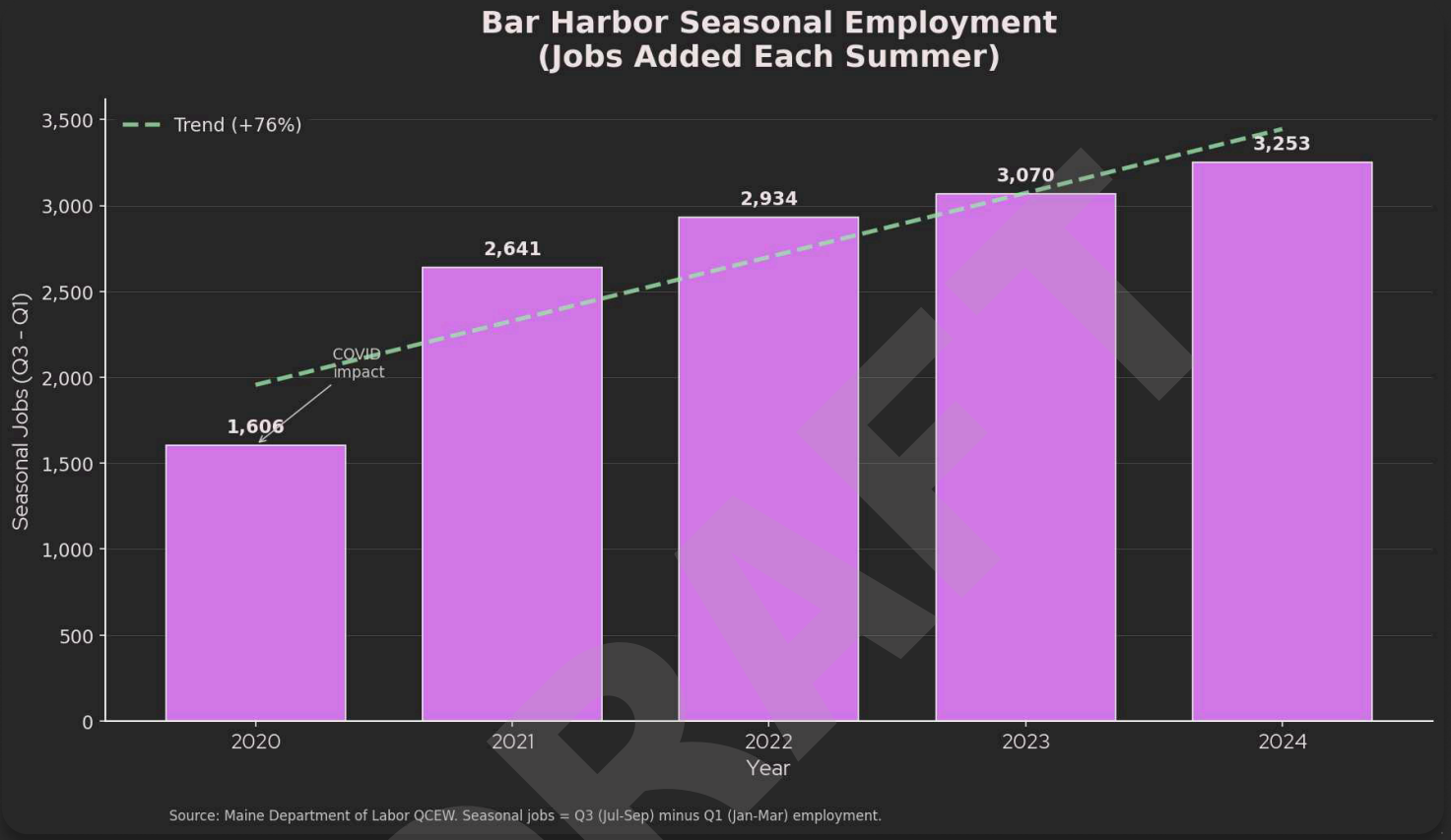
The number of seasonal positions is increasing. Comparing 2021 with 2024, Bar Harbor added 23% more seasonal jobs within a three-year period. As of 2024, nearly half (46.4%) of all peak-season jobs in Bar Harbor are seasonal—meaning they exist only for a few months each year.

Almost 80% of the summer surge is concentrated in one sector: accommodation and food services, which grows by more than 430% between winter and summer. Retail, transport, real estate, and recreation more than double their headcounts during the same period.

Finding #5: Seasonal labor adds to housing and infrastructure pressure

Every summer, Bar Harbor's housing stock, services, and infrastructure must absorb an additional 2,700 workers on top of the visitor surge itself – even though those jobs disappear when the season ends. As noted in a study of 38 OECD nations, high seasonality and high volume of visitors tend to push up housing costs and divert units into short-term and tourism uses, worsening affordability and rental precarity for local workers and long-term residents. This dynamic has been observed in Lisbon, Barcelona and Reykjavik, where higher-yields from visitors prioritize land use, housing, and commercial space, thereby pricing out local residents, services, and workers.

TABLE 16: BAR HARBOR SEASONAL EMPLOYMENT 2020-2024



Source: Maine Department of Labor QCEW. Seasonal jobs = Q3 (Jul-Sep) minus Q1 (Jan-Mar) employment.

Finding #6: Employee retention challenges

There are real downsides to highly seasonal labor markets. It can translate into unstable work, short contracts, a lack of career progression, and the shuttling of workforces in and out of their destinations which adds to congestion, parking, and traffic issues. Seasonality also impacts business decisions, with research on seasonal employment in tourism enterprises showing that employment decisions are driven almost entirely by demand spikes: businesses either shed staff sharply in the off-season, or “hoard” a small core of permanent workers while relying heavily on low-security seasonal labor at the peak. Research on seasonal employment in tourism economies shows consistent patterns that apply directly to Bar Harbor:

- Unstable work: Businesses either shed staff sharply in the off-season or "hoard" a small core of permanent workers while relying heavily on low-security seasonal labor at peak times.
- Limited career progression: Surveys of tourism workers find that high seasonality makes jobs feel precarious and low-prospect—something to move on from rather than build a life around.
- Reduced community attachment: Workers are less likely to settle, invest in housing, or become part of the year-round community when employment is unpredictable.
- Service-quality effects: High turnover and short contracts make it harder to maintain consistent service standards or institutional knowledge.

Planning implications

What seasonality means for planning

Bar Harbor's carrying capacity challenge is driven less by overall tourism volume than by the extreme seasonality of that volume. More than 54% of the town's total economic activity—roughly $270–$280 million annually—exists as a tourism premium concentrated almost entirely between May and October, while sales tax data show that from November through April the local economy falls below the baseline expected for a non-tourism town of comparable size.

This seasonal compression reshapes the town's economic and social systems: employment rises by 72% between winter and summer, with nearly half (46.4%) of peak-season jobs classified as seasonal, and accommodation and food services alone expanding by over 430%. Costs associated with this peak—higher rents, labor competition, and land values—persist year-round, even as winter demand collapses. The result is an economy that appears exceptionally strong on paper, yet struggles to support stable housing, workforce continuity, and resident-serving businesses outside the peak season.

High seasonality in employment undermines workforce stability and retention

With employment nearly doubling between winter and summer and almost half of peak-season jobs being seasonal, Bar Harbor's labor market discourages long-term settlement and career development. This erodes institutional knowledge, service quality, and community attachment—key components of social sustainability.

Seasonal labor inflows compound housing and infrastructure pressure

Each summer, thousands of additional workers must be housed and moved through a system already stretched by visitor demand. This reinforces a cycle where housing is diverted to short-term use, rents rise, and workers are displaced —tightening the town's effective carrying capacity even if visitor numbers remain stable.

Tourism profitability masks declining viability for non-tourism livelihoods

High peak-season returns inflate rents and land values, but the winter market does not support those costs for trades, mechanics, and resident-focused businesses. Over time, this narrows the economic base and increases dependence on tourism, reducing resilience to shocks.

Housing and Lodging Markets

A rapidly evolving landscape

The availability of housing has become a growing concern for many destinations around the world. The rise of short-term rental platforms, such as Airbnb, Vrbo, Google Vacation Rentals and even online travel agencies like Booking.com have transformed traditional housing stock into an investment opportunity for those looking to offer an alternative to hotels or bed and breakfasts.

Airbnb began as an affordable alternative to hotels, offering landlords and local residents a new income stream, while giving visitors a chance to meet new people, explore local places, and find a room when hotels were fully booked. Before long, the idea transformed. Investors realized that STRs can earn roughly double the weekly income of long-term rentals, which creates a strong financial incentive to move units out of the residential market. Property and investment groups began quietly buying up properties, supported by property management companies that would take care of day-to-day operations, such as guest services, cleaning, and bookings. These investors began repurposing housing stock in some of the world's most visited destinations, away from the needs of residents, and towards growing global demand among travelers and tourists.

Today, across many of the world's most visited destinations, the rise of short-term rentals is colliding with an older set of policies that were never designed with platforms like Airbnb in mind. Environmental, heritage and conservation rules in cities such as Paris, Amsterdam or Oxford were originally introduced to protect historic streetscapes, limit sprawl, and safeguard parks and reserves. One side-effect of those protections was to constrain new housing supply and, over time, help to support property values by making homes a relatively scarce, long-term asset.

As resident and visitor populations have grown, that protected, slow-growing housing stock has come under increasing pressure. When you overlay this structural shortage with the financial appeal of short-term rentals – where a dwelling can often earn more in a summer of nightly bookings than in a year of long-term rent – the incentives tilt sharply away from permanent occupancy. In that context, STRs can often intensify affordability problems for residents, while eroding the pool of homes available to the local workforce.

Short-term rental pressures

Equator selected two US towns to provide a benchmark against which it could assess the state of Bar Harbor's short-term rental market. These towns, Pacific Grove, California and Bozeman, Montana, share several structural features with Bar Harbor and have reliable, openly available short-term rental data. Both are tourism-oriented communities anchored by major natural and cultural assets: Pacific Grove sits on Monterey Bay next to the Monterey Bay Aquarium and coastal reserves, while Bozeman is a key gateway to Yellowstone and outdoor recreation in the Rockies.

Like Bar Harbor, they have year-round resident populations, but draw large influxes of visitors from nearby metropolitan areas (Bay Area, Los Angeles, Salt Lake City, Denver) and are served by regional airports that make them accessible short-break destinations. Together, this makes them useful benchmarks for understanding how a coastal resort town and an inland gateway city, both with strong visitor economies and solid STR datasets, manage the balance between tourism accommodation and local housing.

Finding #1: Bar Harbor has one of the highest STR saturation rates documented

Roughly one in seven homes in Bar Harbor (approximately 14–15% of total housing stock) now functions as a licensed short-term rental. On a per-capita basis, this translates to approximately 94 STRs per 1,000 residents. This is between five and nine times the per-capita saturation of Pacific Grove and Bozeman—both well-known tourism towns with active STR markets. In both comparison towns, STRs account for less than 5% of housing stock.

For international context: we reviewed many of the world's most visited destinations—London, Paris, Barcelona, Amsterdam, New York, San Francisco, Madrid, Copenhagen—and in none of these cases did short-term rentals account for more than 4% of total housing stock. Bar Harbor's saturation level is in a different category entirely.

Finding #2: The pattern is unusual—high saturation, but fragmented ownership

What makes Bar Harbor different from most STR-affected destinations is the nature of ownership. In cities like Paris, New York, and London, short-term rentals have become a commercial asset class dominated by professional "hosts" who control dozens or hundreds of units, supported by property management companies. Bar Harbor looks quite different. The 2025 licensing data shows:

- Approximately three-quarters of STR properties are held by individual owners
- Only about one-quarter are held by commercial entities
- The top ten owners control less than 8% of the market
- Over 90% of hosts have a single property

By contrast, in Pacific Grove the top ten owners control nearly half of all listings; in Bozeman, over a quarter. Bar Harbor's market, while intensely saturated, has not yet been captured by large-scale investors.

Finding #3: Fragmented ownership creates a policy window

This ownership structure has important implications. Without pressure from large investment groups, Bar Harbor faces reduced risk of rapid portfolio expansion. It also means many owners are locally embedded rather than anonymous funders, which can make it easier to build community support for calibrated reforms.

However, global experience shows that investor groups move quickly once a market is proven. Bar Harbor's current fragmentation may be temporary. The town has a narrow but important window in which to establish clear rules before commercial consolidation occurs.

Hotels and resorts

Bar Harbor's hotel-and-inn inventory is substantial for a town of ~5,326 residents (2024 estimate): 84 properties totaling ~2,940 rooms—about 552 rooms per 1,000 residents—and it sits alongside a high short-term rental (STR) presence (15 STRs per 1,000 people, per your data). This matters for carrying capacity because accommodation supply isn't purely about managing demand, it determines the ability of Bar Harbor to manage peak days, peak streets, and peak park hours, pushing destinations past thresholds in infrastructure (water/wastewater, solid waste, roads/parking), ecosystems, and resident wellbeing.

Finding #1: There is a concentration risk in supply-side management

The top 10 largest properties hold ~45% of all rooms, meaning a small number of operators can drive or relieve peak pressure quickly through pricing, group bookings and event scheduling. While most properties in the town are small-to-medium sized, room supply is dominated by the larger hotels. Working closely with the larger hotel groups - all of whom remain operational throughout the year - could present significant upsides that help address the volatility of seasonal demand. For example, just 4 hotels control 636 rooms, which can translate into ~1400+ guests at typical occupancies.

Finding #2: Lodging is capable of tripling the town population overnight

With 2,940 hotel rooms and STRs licensed for 3,958 guests, Bar Harbor's overnight capacity reaches 11,308 people—about 2.0 overnight visitors per resident (11,308 vs ~5,326). At 94-96% peak-season occupancy, hotels and short-term rentals, are operating with almost no slack. So even small shocks (bad weather, natural disasters, clustering or traffic events) spill into environmental and social domains.

Finding #3: The off-season has significant room for growth

Current winter occupancy rates suggest 2,100-3,600 hotel guests per night during the off-season. With 2,300-2,500 available rooms, there is capacity for 3,000+ additional guests per night without any currently-closed properties reopening. Even with 556 seasonal rooms offline (adjusting for 12 hotels that close permanently in the off-season) winter operations have the capability of supporting between up to 3,000 additional hotel guests per night.

INVERTING TRADITIONAL OCCUPANCY CHARTS SHOWS HOW MANY EMPTY ROOMS THERE ARE IN THE OFF-SEASON

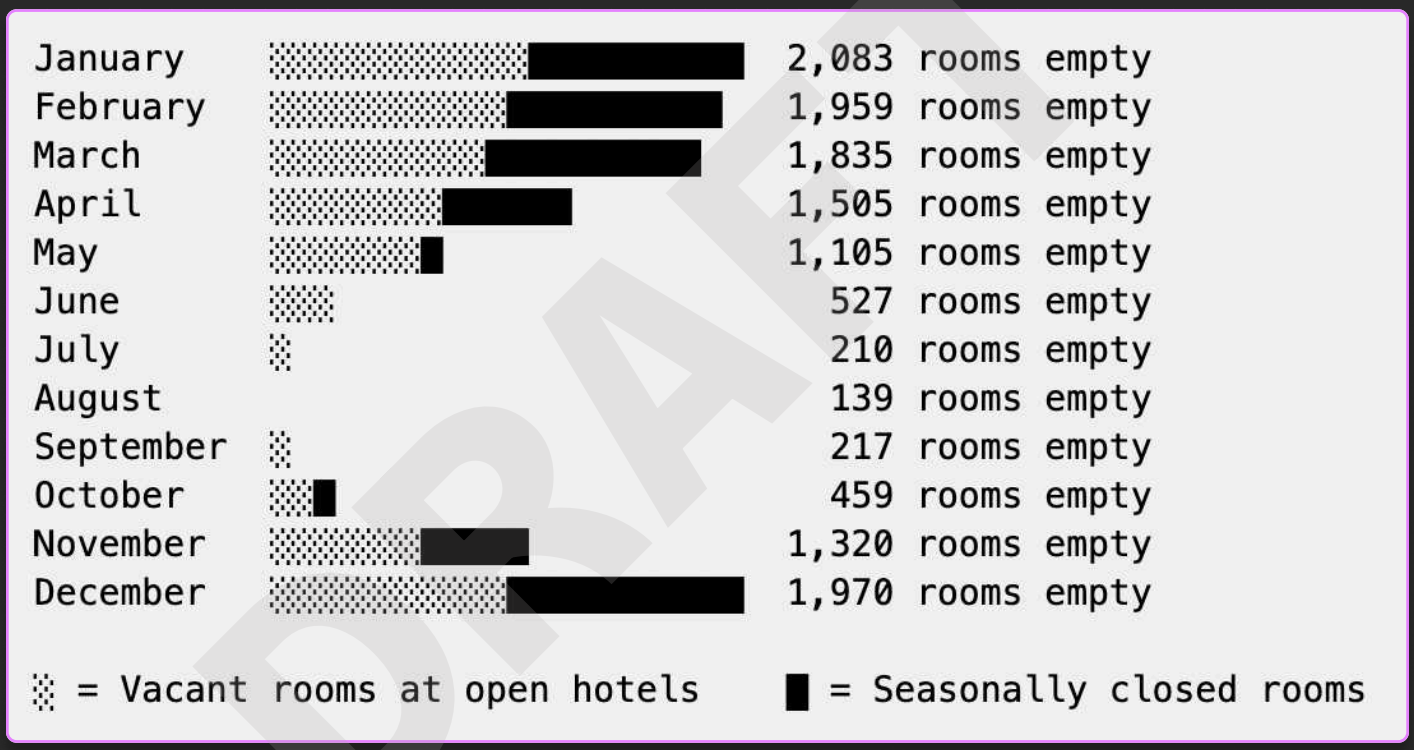
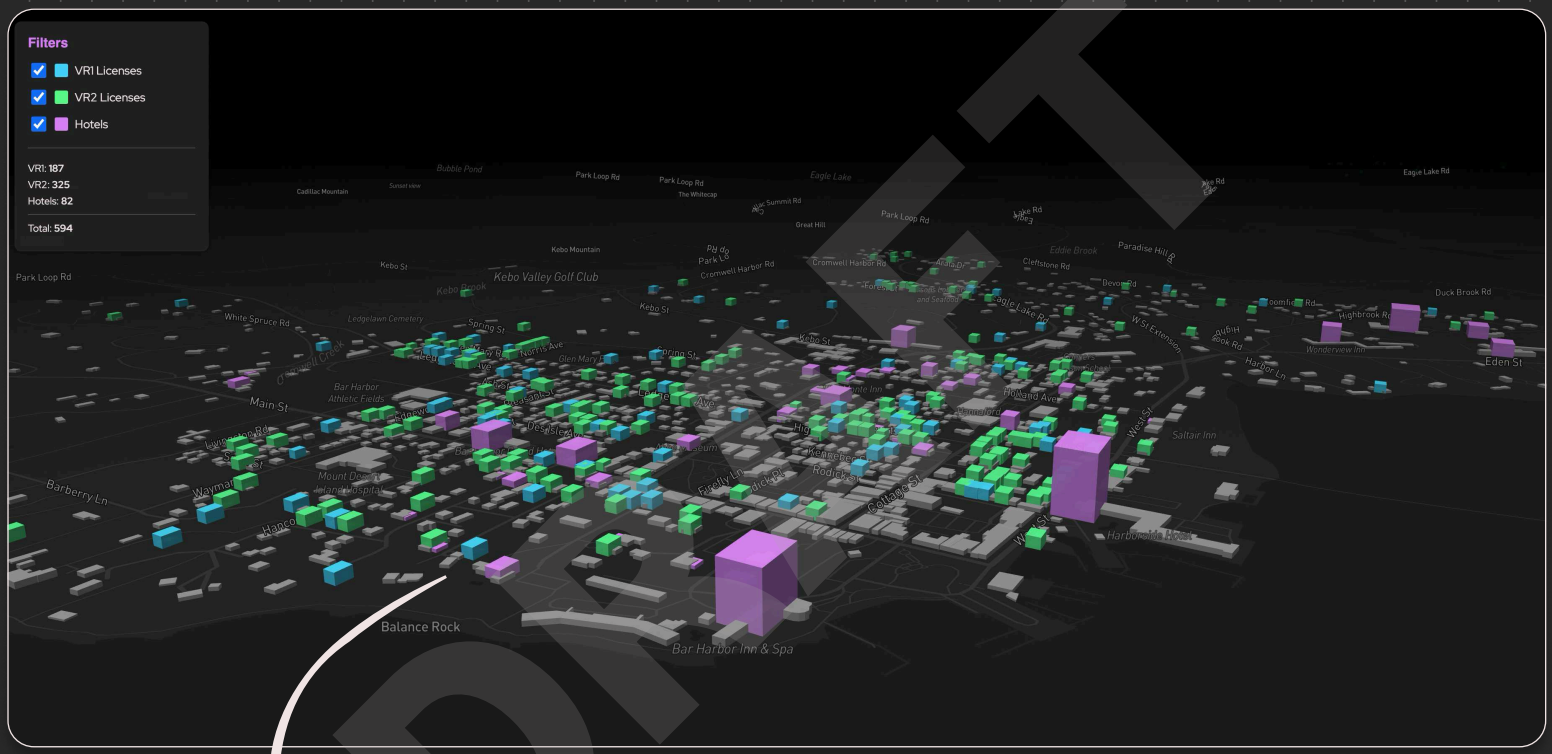


TABLE 17: VACANT ROOMS AT OPEN HOTELS - BAR HARBOR

3D-SPATIAL IMAGING SHOWS THE NUMBER AND LOCATION OF BUILDINGS DEDICATED TO VISITORS



STRs are fairly dispersed, with hotels (by total available rooms) are along the waterfront

TABLE 18: NUMBER AND LOCATION OF BUILDINGS DEDICATED TO VISITORS - BAR HARBOR

Planning implications

What housing and accommodation mean for planning

Bar Harbor's housing market is under serious strain. Roughly one in seven homes is now a short-term rental — far higher than comparable tourism towns and major global cities. This makes it increasingly difficult for essential workers and year-round residents to find affordable housing. Since large investors and management companies don't yet dominate the local short-term rental (STR) market, there's a real window of opportunity to establish policies that protect long-term liveability before that changes. Against that backdrop, the data suggests several directions for the Town of Bar Harbor to consider as it considers the Sustainable Tourism Management Strategy:

Continue to differentiate between home-sharing and commercial holiday rentals.

Preserve (or even expand) space for VR1-type, primary-residence hosting that helps households stay afloat, while limiting VR2 units that permanently remove stock from the long-term markets. In practical terms, that points toward tighter caps, higher fees, shorter license terms, and stricter renewal criteria for VR2s, paired with more permissive rules for genuine home-shares.

Ensure availability of housing for key workers

Be clear that short-term rental policy is as much about managing tourism sustainably, as it is about securing houses for nurses, teachers, mechanics and the trades so that essential services can access affordable housing. Consider license revenues and fees to help finance workforce housing, and policies that retire or convert STRs in exchange for the delivery of long-term rental units. New housing approvals should prioritize permanent occupancy and worker housing over additional visitor stock. Reserve future housing stock for resident and key-worker occupancy, set expectations or build requirements for future tourism development and investment that apportions housing for workers and encourages long-term human capital investment

Be proactive around corporate consolidation of housing.

Even though Bar Harbor's STRs are currently fragmented across many small owners, global experience shows that investor groups move quickly once a market is proven. Build early-warning tools into the system: monitor multi-property portfolios and consider caps on the number of licenses or dwellings that can be held by a single owner or corporate entity.