

# DESTINATION NEXT

---

## Maine Statewide Assessment – Aroostook County

June 5, 2018

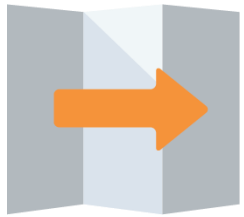


**Paul Ouimet**

# DestinationNEXT

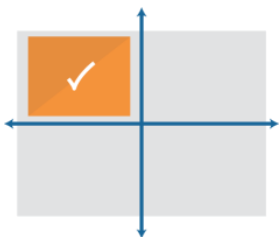
## Vision:

Provide destination organizations with a powerful assessment tool and practical actions and strategies for sustainable success in a dramatically changing world



## Futures Study

- 75 trends & 55 strategies
- 433 respondents in 52 countries



## Scenario Model & Assessment Tool

- 4 unique scenarios
- 163 detailed assessments in 11 countries



# Maine - 8 Regional Assessments

April 10

- **Portland: Greater Portland & Casco Bay**
- **Auburn: Maine Lakes & Mountains**

April 11

- **Farmington: Maine Lakes & Mountains**
- **Hinckley: Kennebec Valley**

April 12

- **Dover-Foxcroft: Maine Highlands**
- **East Millinocket: Maine Highlands**

April 13

- **Bangor: Maine Highlands**

October 16

- **Fort Kent: Aroostook County**
- **Presque Isle: Aroostook County**

October 17

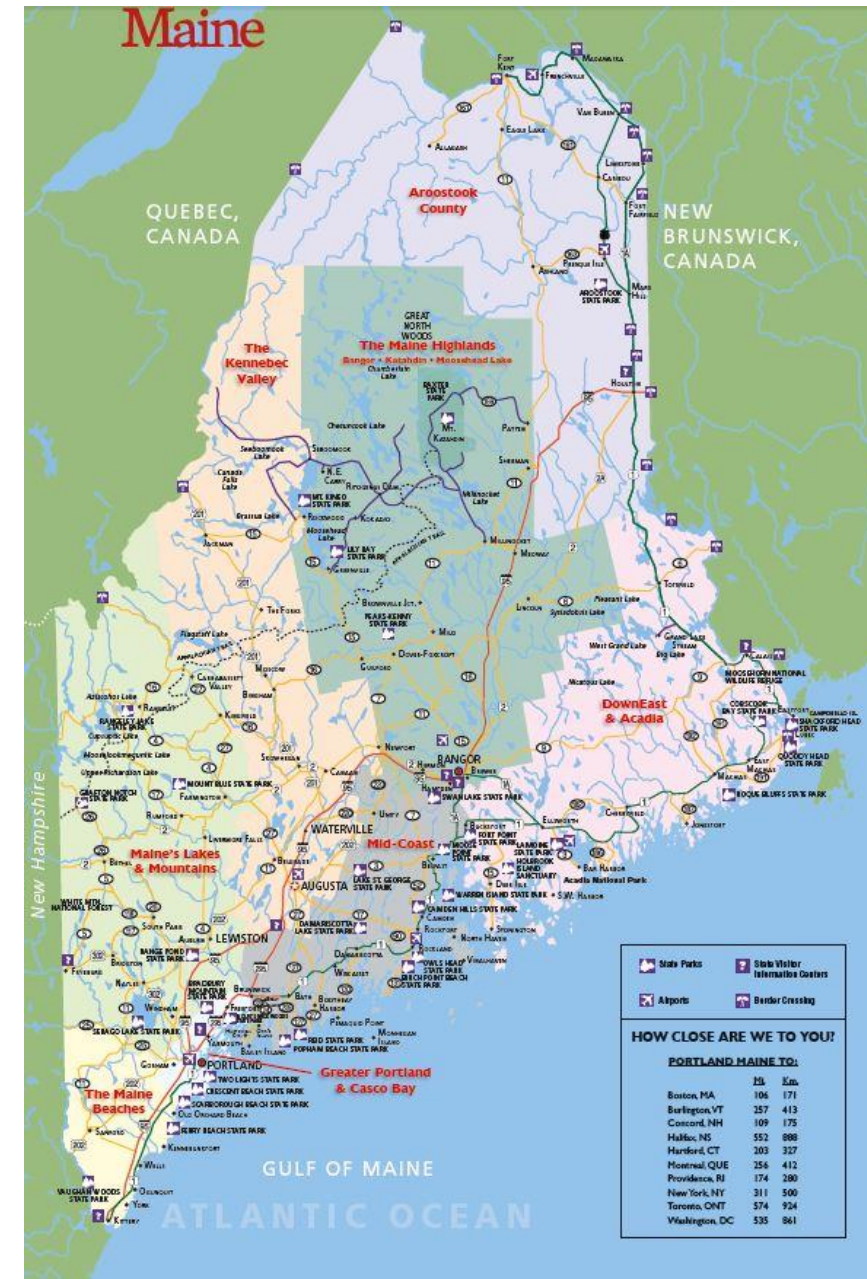
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

October 18

- **Rockland: Maine Mid-Coast and Islands**

October 19

- **Biddeford: The Maine Beaches**





# Today's Objectives

1. Present scenario model & overall DestinationNEXT findings
2. Review assessment results for Maine and region
3. Discuss NEXTPractices
4. Discuss potential initiatives & next steps



# SCENARIO MODEL



**DESTINATIONS**  
INTERNATIONAL

# Scenario Model

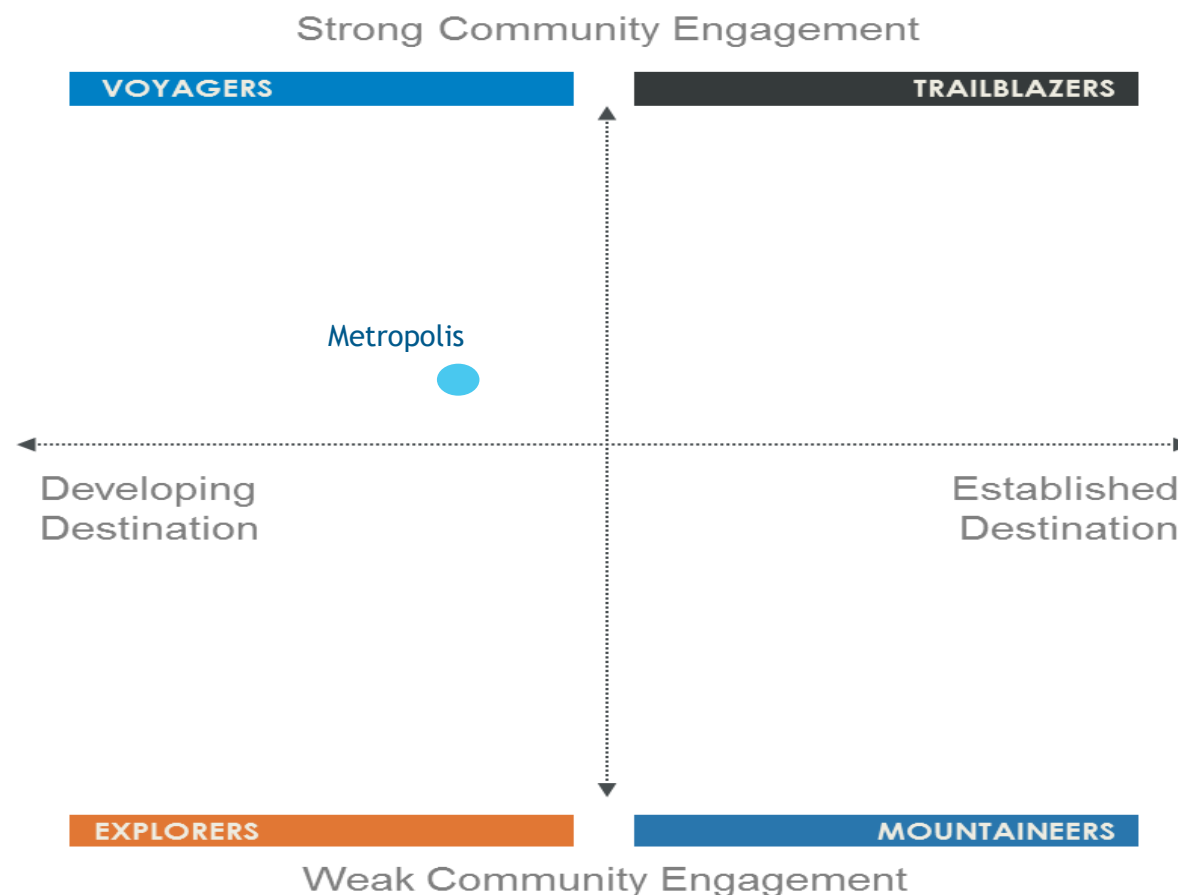




# Purpose of Diagnostic Tool

Scenario model intended to be strategic diagnostic tool, not a benchmarking index to rank DMOs, CVBs or destinations

**Objective self-assessment to help identify priorities and strategies for the future**



# Destination Strength Variables



**Destination  
Performance**



**Brand**



**Accommodation**



**Attractions and  
Entertainment**



**Conventions & Meeting  
Facilities**



**Air Access**



**Events**



**Sporting and  
Recreation Facilities**



**Communication &  
Internet Infrastructure**



**Mobility and Access**

# Community Support & Engagement Variables



**Effective DMO  
Governance Model**



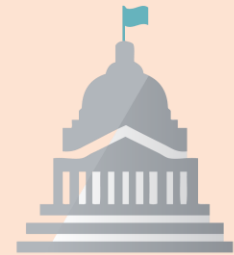
**Membership Strength  
& Support**



**Industry Support**



**Local Community  
Support**



**Policy and  
Regulatory Environment**



**Workforce**



**Hospitality Culture**



**Regional Cooperation**



**Funding Support &  
Certainty**



**Economic Development**



# Destination Assessments



**350**

destinations from  
18 countries



**163**

detailed  
assessments  
completed in 11  
countries



**70**

underway or  
planned,  
including 4 other  
countries



**60**

in discussions,  
including  
14 other countries

---

USA, Canada,  
Mexico, Switzerland,  
Colombia, Korea  
Guatemala, Taiwan,  
Denmark, Brazil  
Australia

---

Dominican Republic, El  
Salvador, Ecuador  
South Africa

---

Peru, Argentina, Dubai,  
Germany, Honduras, Chile,  
New Zealand, United  
Kingdom, Thailand,  
Micronesia,  
Philippines, Russia, Ghana,  
Nigeria

# United States

DESTINATION  
**NEXT**



# Canada

DESTINATION  
**NEXT**

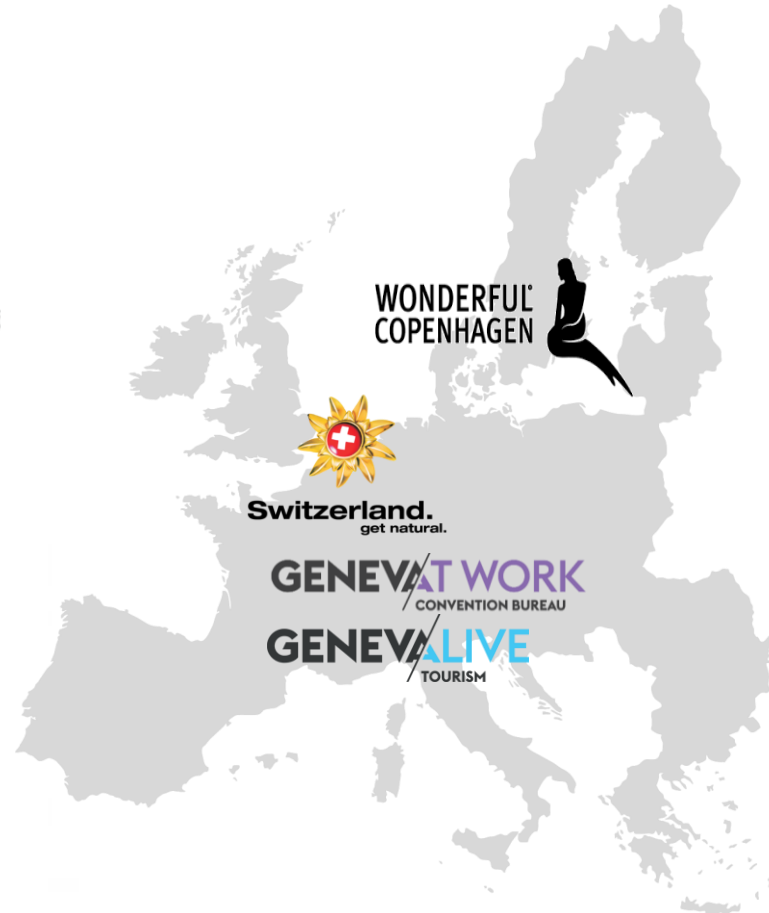




# Latin America



# Europe



# Asia/Australia



# Regional Assessments



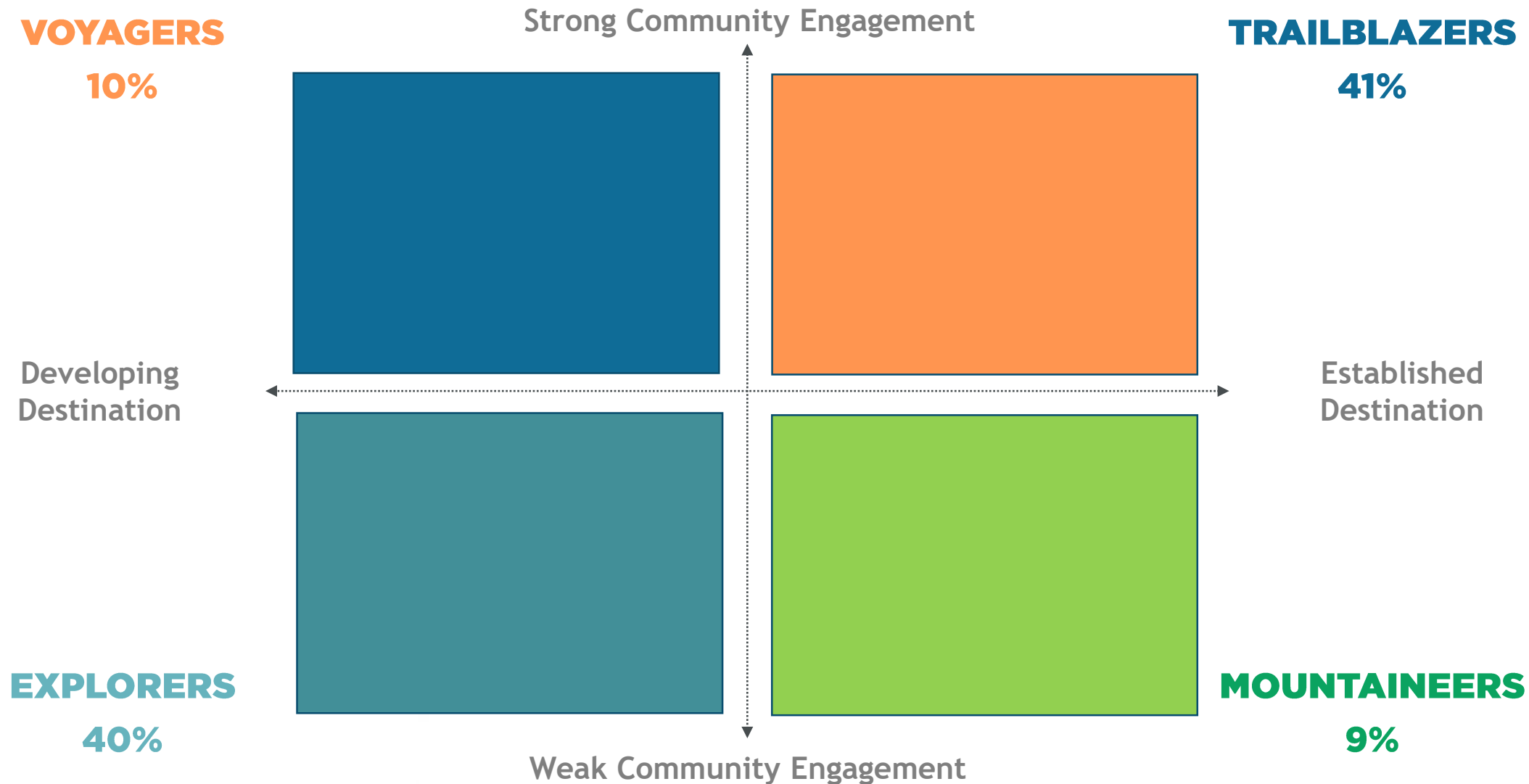
**Northwest Florida  
Tourism Coalition**

**South Africa  
Convention Bureau**

# Global **Results**



# Scenario Model



# Destination Strength Rankings – Global Averages



## Relative Importance



Brand

1<sup>st</sup>



Destination Performance

2<sup>nd</sup>



Attractions & Entertainment

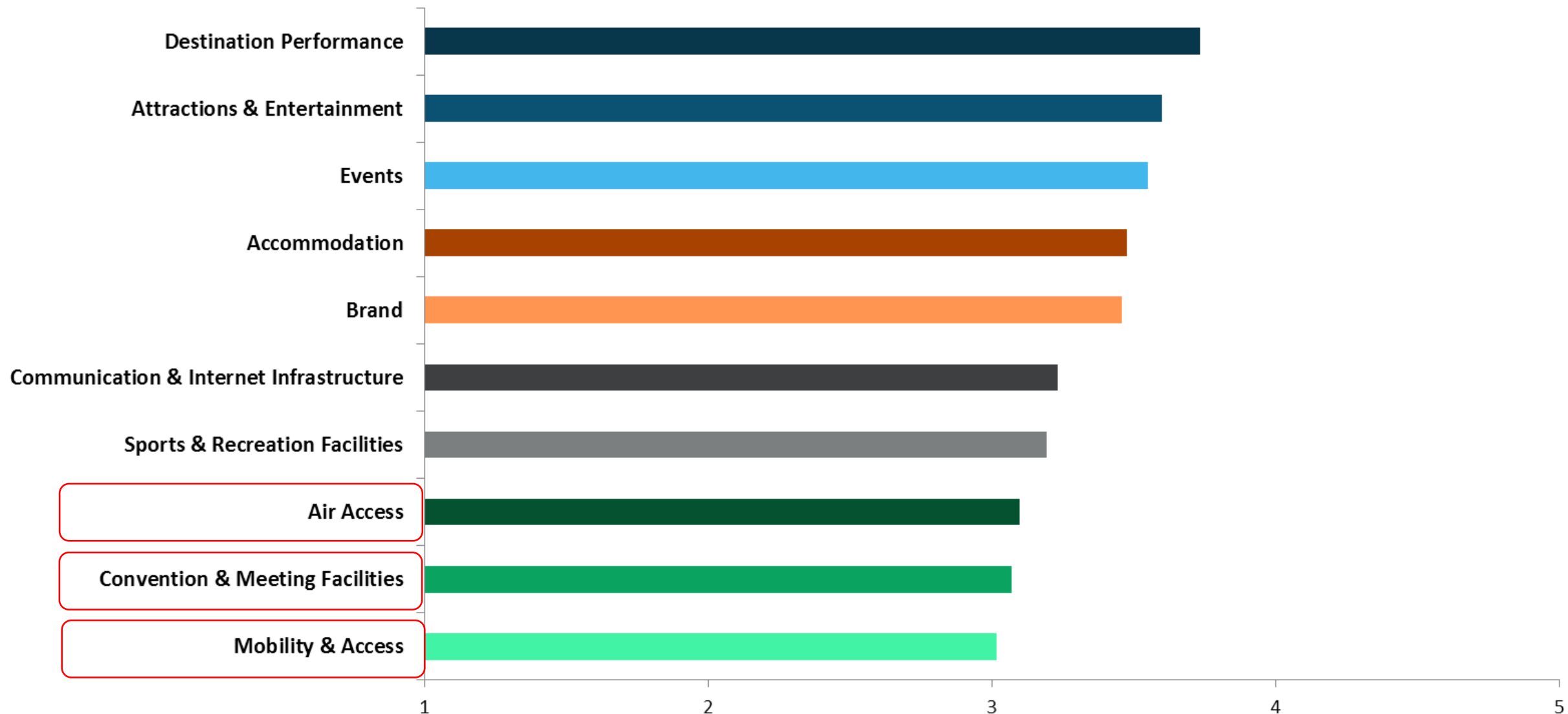
3<sup>rd</sup>



Accommodation

4<sup>th</sup>

# Destination Strength Performance





# Mobility & Access

- Road infrastructure
- Public transportation
- Similar accessibility/experience for those with disabilities





# Convention & Meeting Facilities

- Necessary convention and meeting space to compete in the long-term
- Unique, off-site venues for special events





# Air Access

- Airport “sense of place”
- International air access (number of flights and capacity)
- Domestic air access (number of carriers and low-cost options)





# Community Support & Engagement – Global Averages



Funding Support & Certainty

Relative Importance

1<sup>st</sup>



Industry Support

2<sup>nd</sup>



Effective Destination Organization  
Governance Model

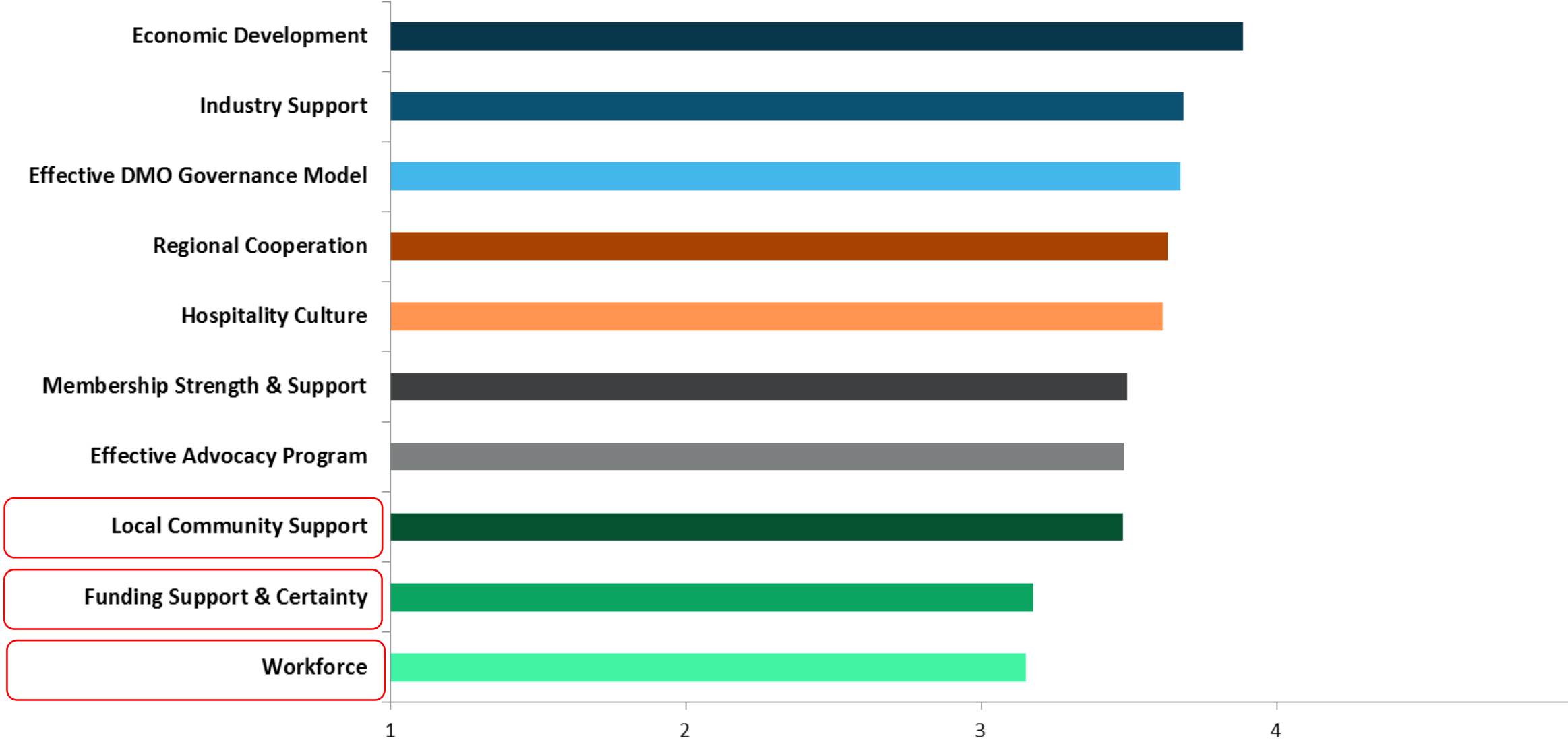
3<sup>rd</sup>



Local Community Support

4<sup>th</sup>

# Community Support & Engagement Performance





# Workforce

- Workforce retention
- Labor relations environment





# Funding Support & Certainty

- Sufficient revenue sources
- Stable revenue source





# Local Community Support

- Support from local residents and media



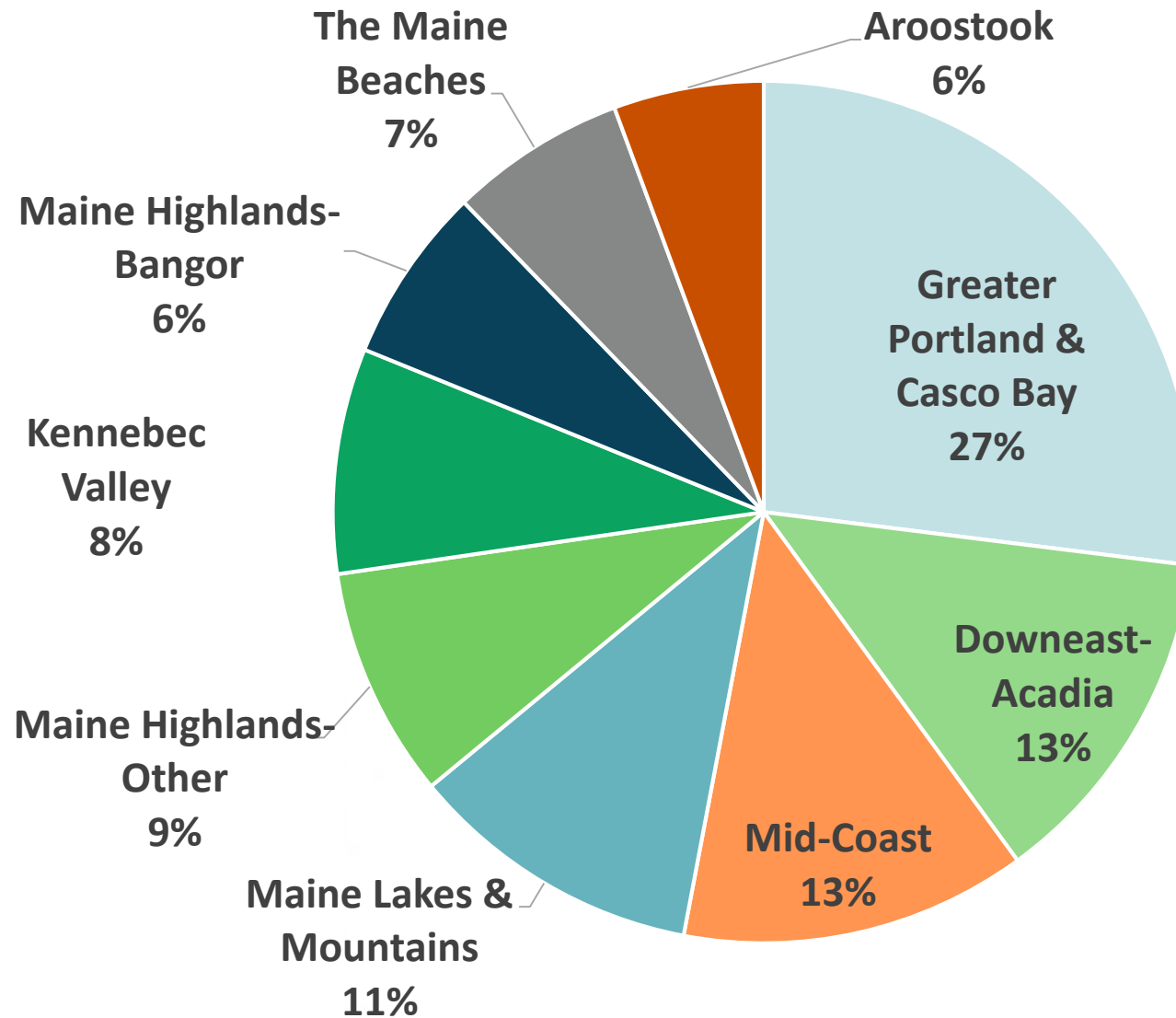
# DESTINATION NEXT

## Multi-User Online Diagnostic Tool Results: State of Maine Assessment

March 29, 2018

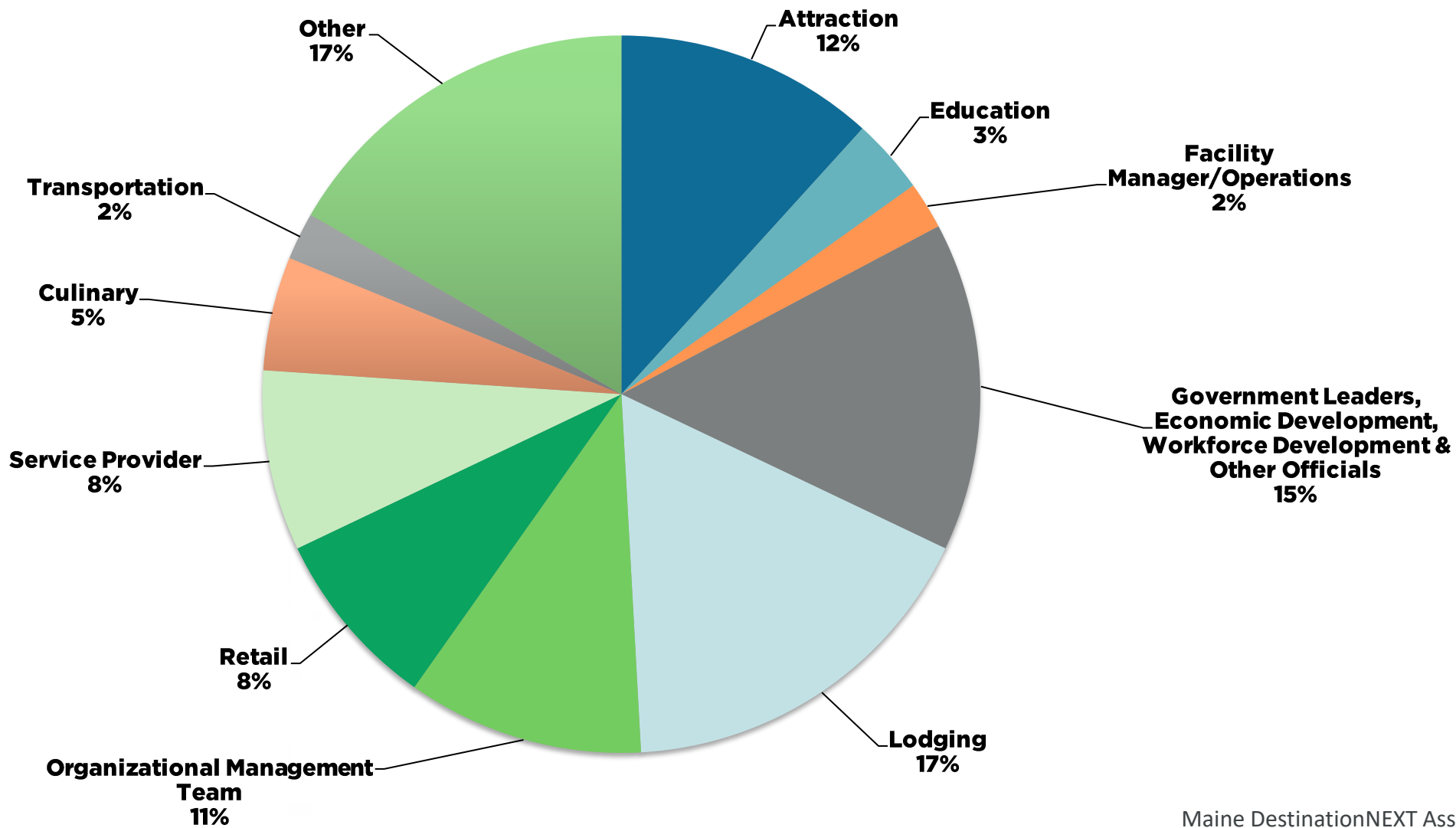


# 1,033 Responses - by Region

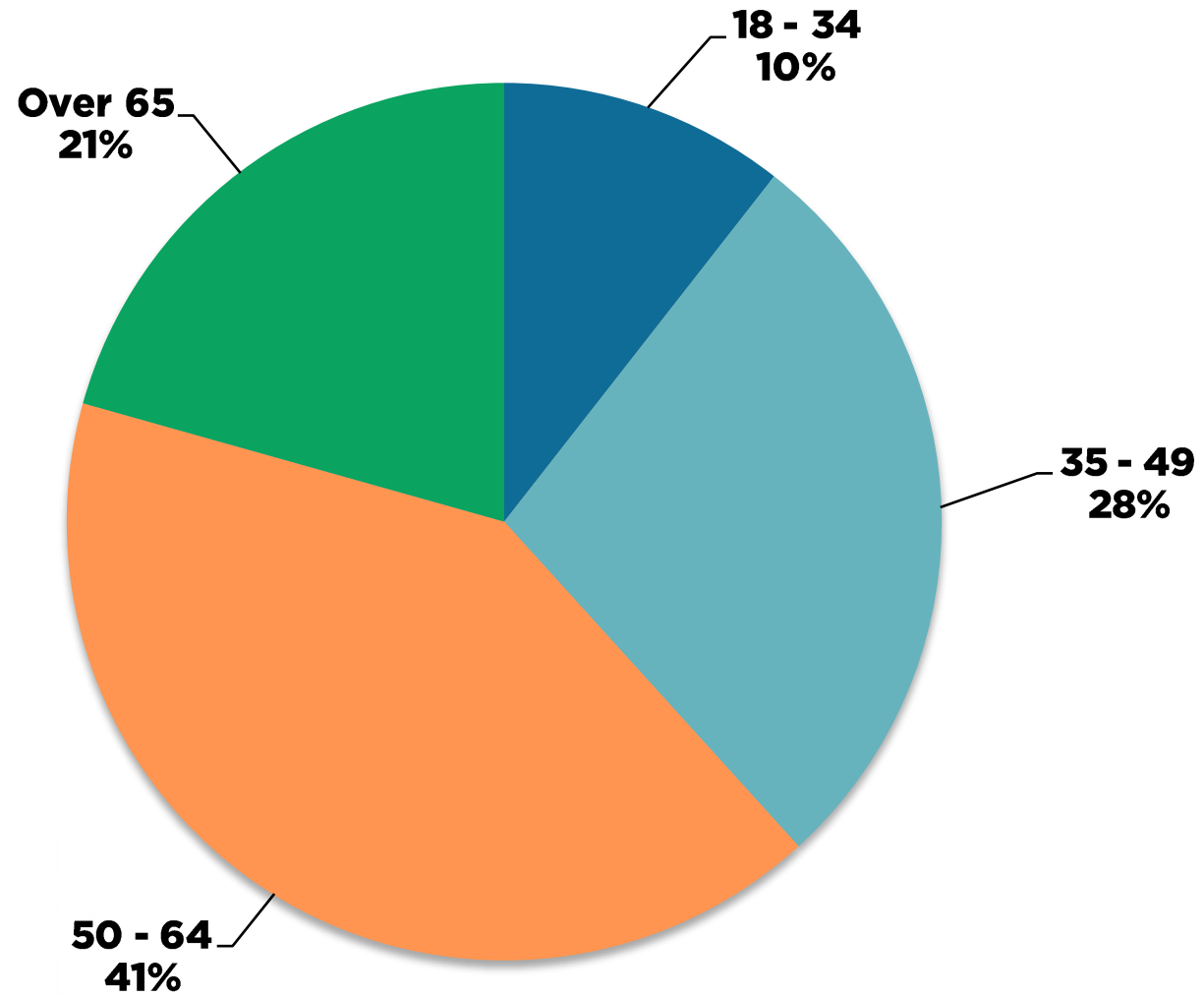




# 1,033 Responses – By Stakeholder

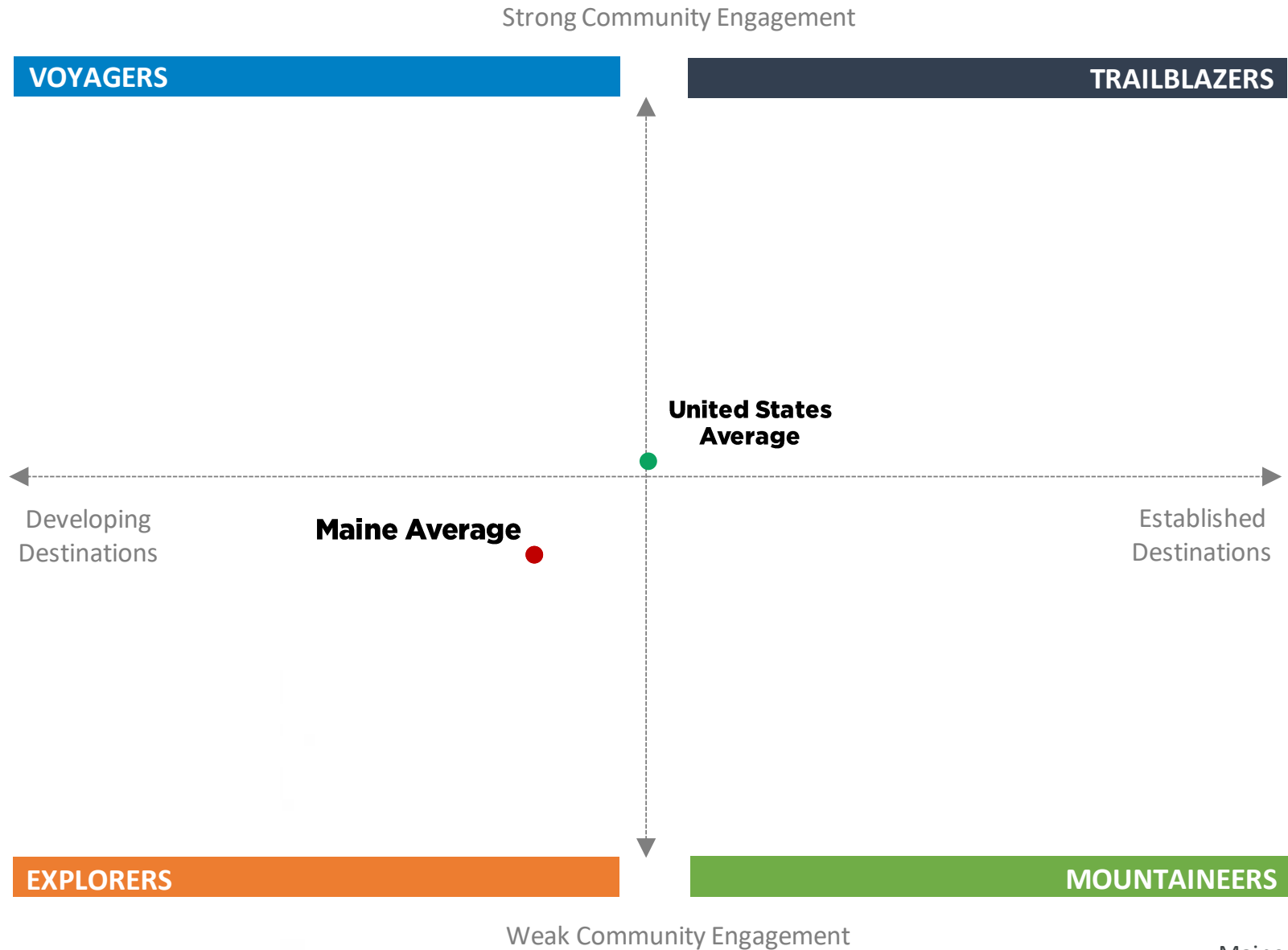


# Age Demographic

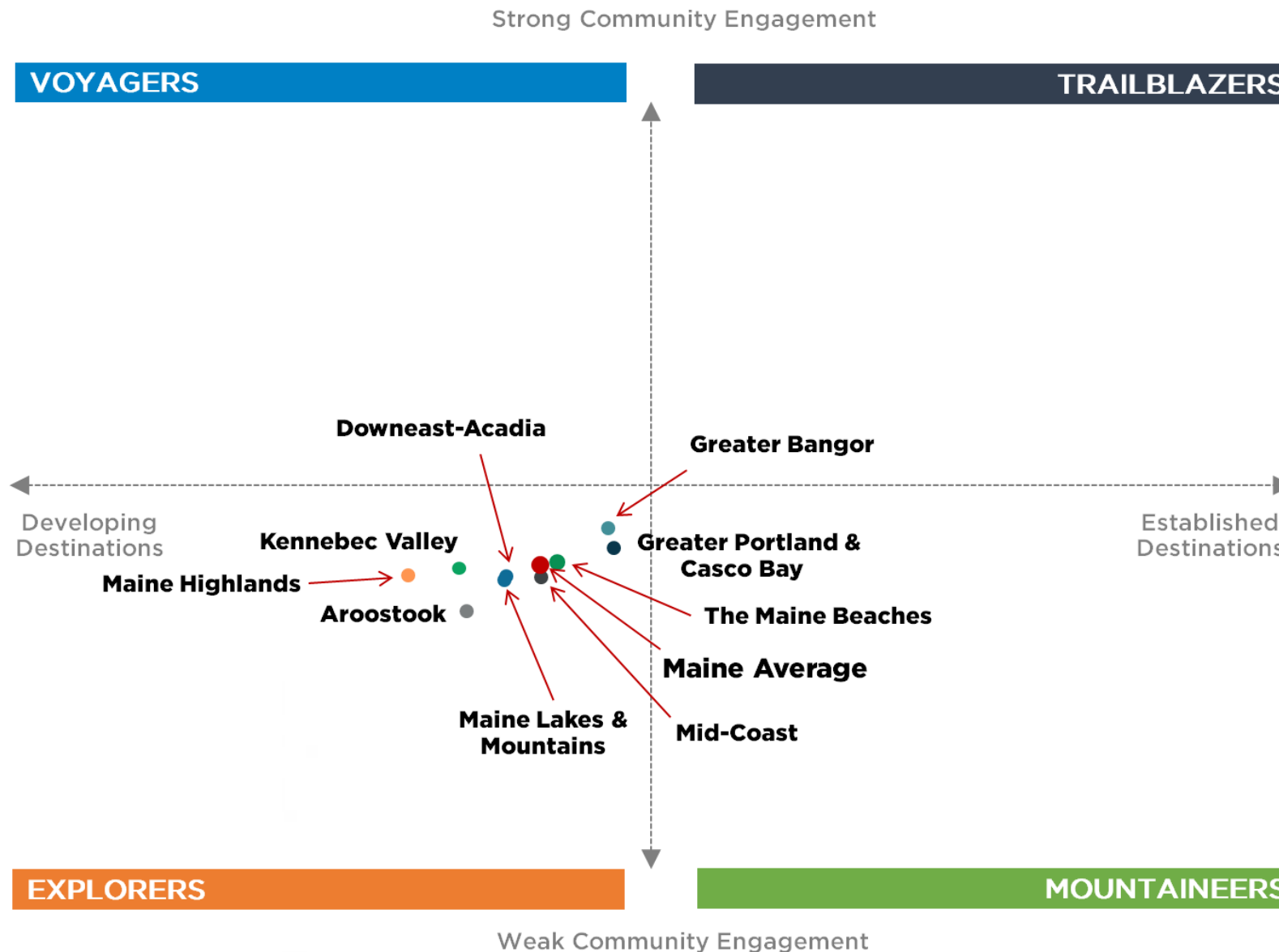




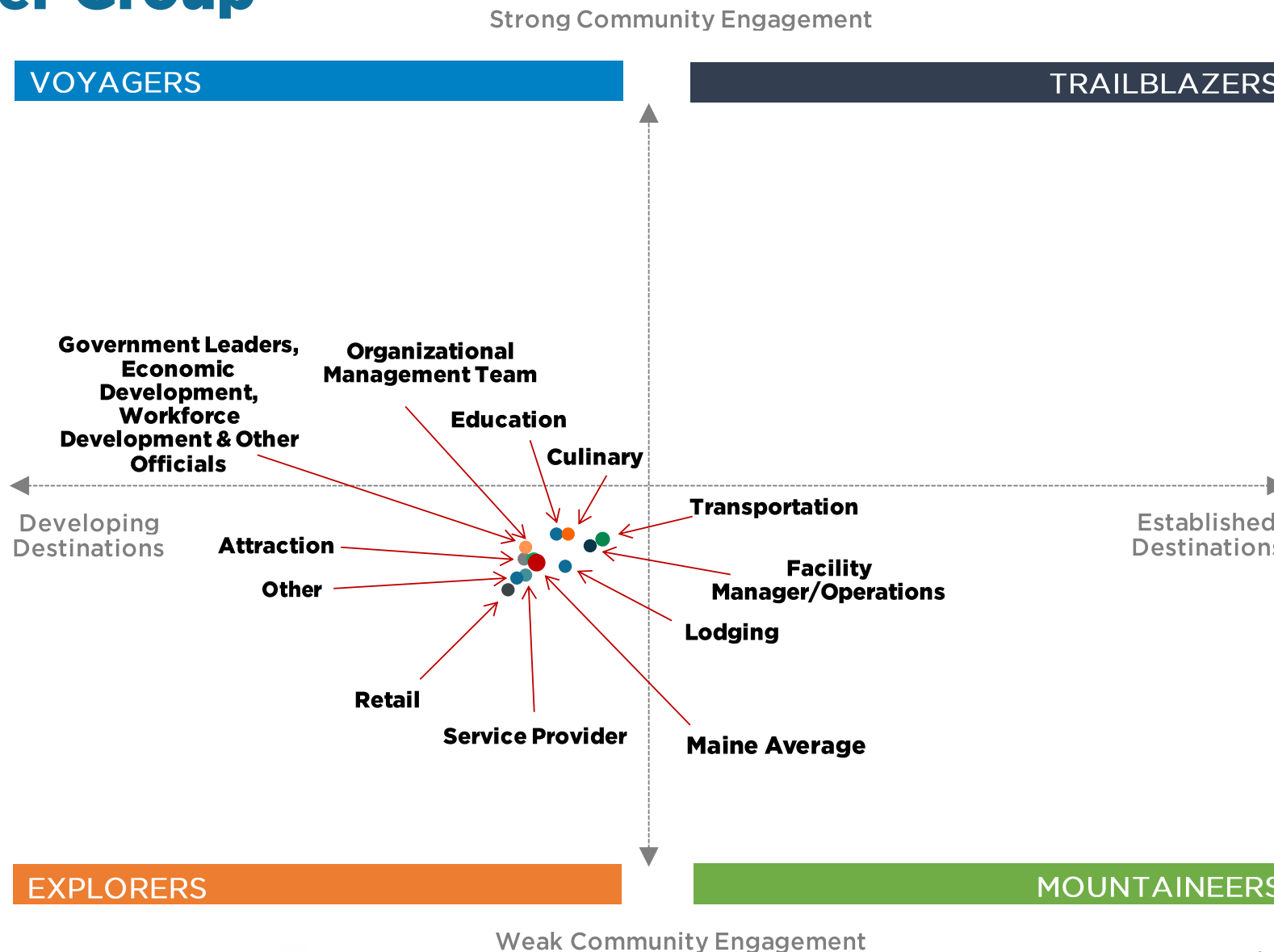
# State of Maine Overall Assessment - Industry



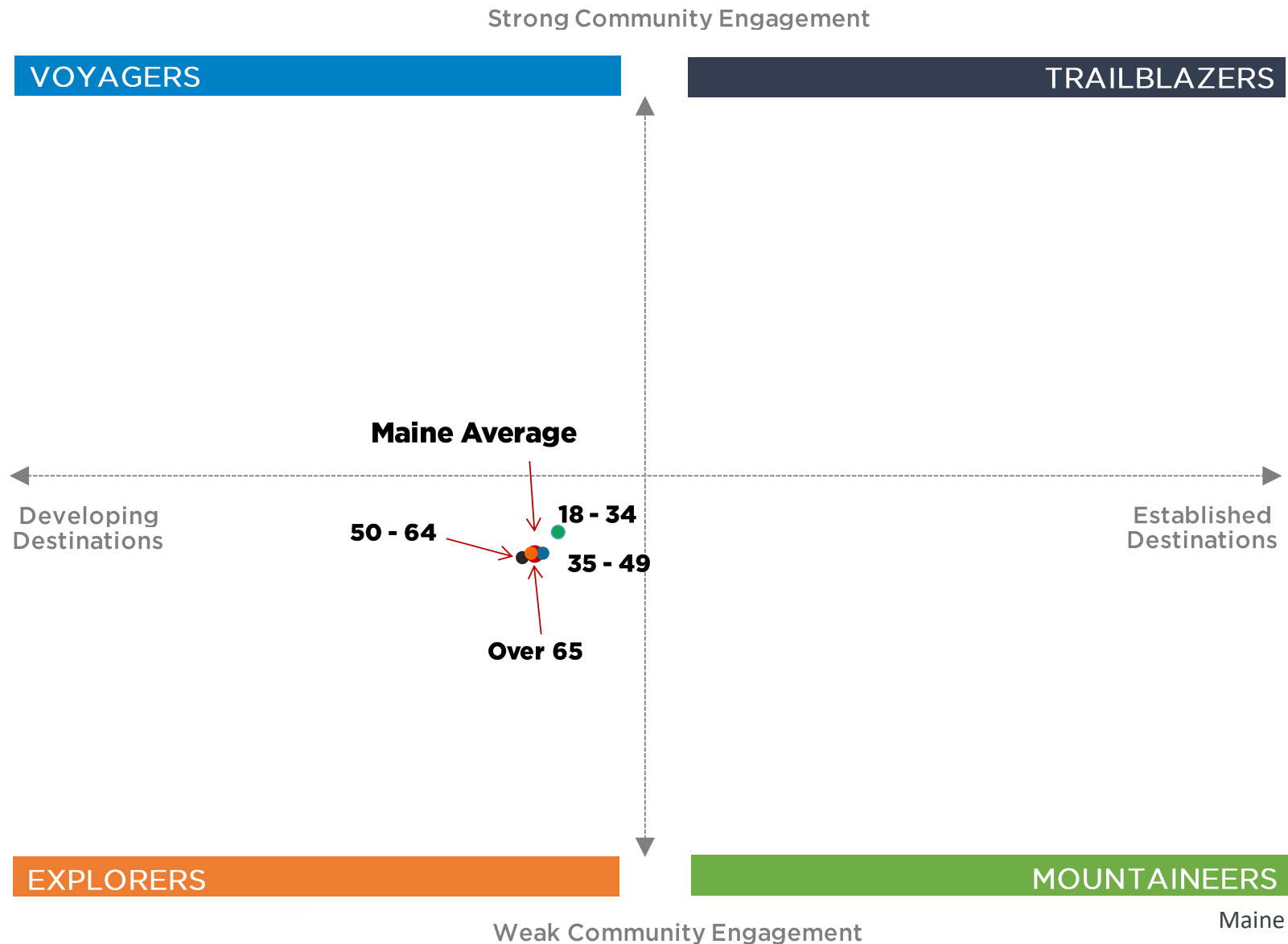
# State of Maine Overall Assessment – Regions



# State of Maine Overall Assessment – Stakeholder Group



# State of Maine Overall Assessment – Age



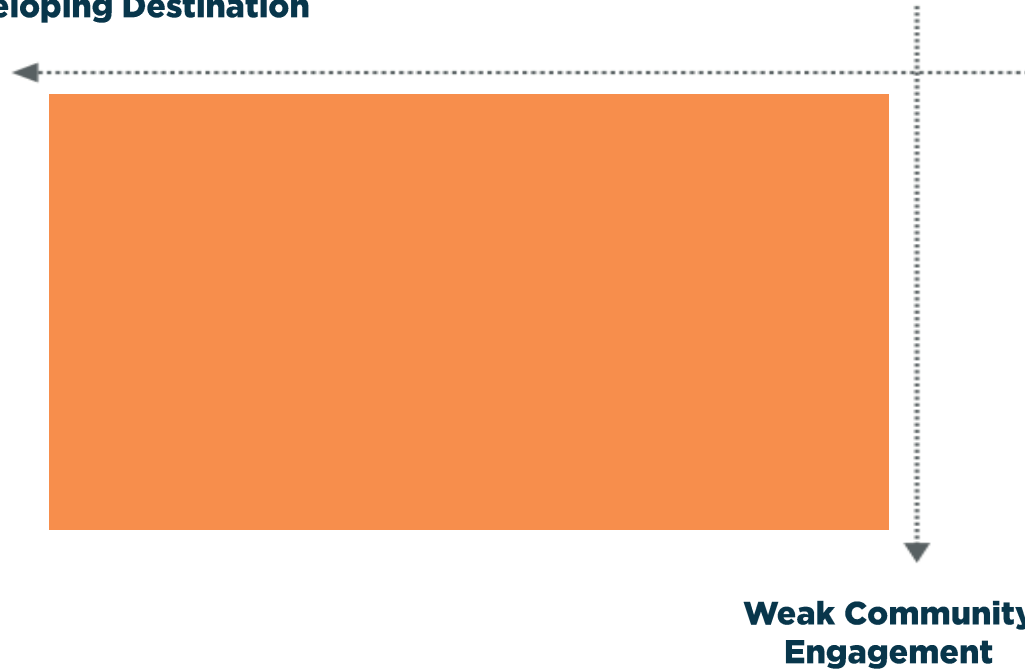
# Explorers

**These DMO's and destinations desire an inspired tourism vision and activated community to make it happen.**

## Key Strategic Challenges

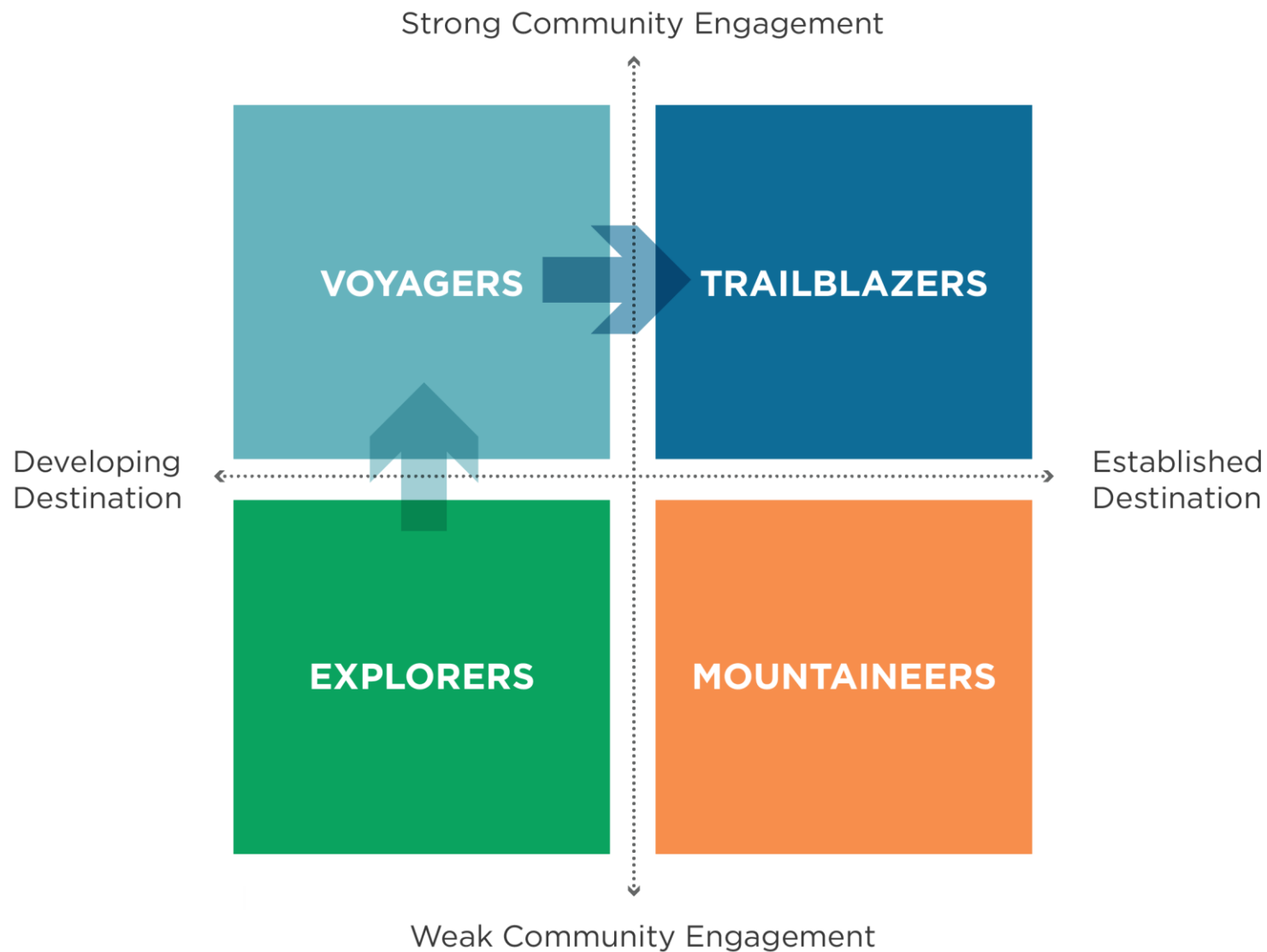
- **Rallying the community to work together towards a realistic vision and strategy**
- **Building community recognition and acceptance that transformational change is needed**
- **Implementing the strategy with limited resources**

**Developing Destination**





# Becoming a Trailblazer



# Destination Strength Rankings – State of Maine



# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Average	Standard Deviation	Industry Average	Maine Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.3%	1%	3.11	2.62	0.71
Accommodation	10.5%	10.9%	2%	3.54	3.06	0.71
Attractions & Entertainment	10.8%	10.8%	1%	3.65	3.49	0.75
Mobility & Access	10.1%	10.6%	2%	3.12	2.76	0.67
Destination Performance	10.0%	10.5%	1%	3.88	3.18	0.70
Sports & Recreation Facilities	9.4%	10.1%	1%	3.29	3.22	0.65
Brand	10.5%	9.8%	2%	3.49	3.42	0.57
Events	9.7%	8.9%	2%	3.63	3.27	0.70
Communication & Internet Infrastructure	10.1%	8.7%	2%	3.39	2.77	0.82
Air Access	9.2%	8.3%	2%	3.16	3.08	0.53

DESTINATION STRENGTH - 0	3.08
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO EXPLORERS

## Note

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.

# Destination Strength – Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast- Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
Convention & Meeting Facilities	2.62	2.21	2.46	2.87	2.28	2.03	3.12	2.53	2.70	2.73
Accommodation	3.06	2.67	2.91	3.41	2.59	2.32	3.39	2.96	3.14	3.20
Attractions & Entertainment	3.49	2.83	3.35	3.95	3.11	2.87	3.20	3.18	3.83	3.59
Mobility & Access	2.76	2.84	2.81	2.85	2.65	2.60	2.89	2.67	2.63	2.73
Destination Performance	3.18	2.82	3.06	3.50	2.81	2.71	3.40	2.97	3.13	3.34
Sports & Recreation Facilities	3.22	3.39	3.09	3.35	3.22	3.09	3.47	3.29	2.91	2.95
Brand	3.42	3.36	3.49	3.47	3.22	3.31	3.41	3.35	3.41	3.58
Events	3.27	3.17	3.21	3.36	3.31	2.85	3.84	3.11	3.34	3.10
Communication & Internet Infrastructure	2.77	2.69	2.48	3.02	2.46	2.37	2.97	2.75	2.68	2.94
Air Access	3.08	2.66	2.95	3.35	2.80	2.64	3.21	2.93	3.20	3.23
DESTINATION STRENGTH - Maine Average										3.08
INDUSTRY AVERAGE DESTINATION STRENGTH										3.49
RESULTING SCENARIO										EXPLORERS

## Note

**Green shading signifies that the region outperformed the destination average by greater than 0.2.**

**Yellow shading signifies that the region underperformed the destination average by greater than 0.2 but less than 0.4.**

**Red shading signifies that the region underperformed the destination average by greater than 0.4.**

# Community Support & Engagement – State of Maine





# Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Average	Standard Deviation	Industry Average	Maine Average	Standard Deviation
Local Community Support	10.2%	10.6%	4%	3.56	3.44	0.79
Industry Support	9.9%	10.3%	2%	3.81	3.50	0.83
Hospitality Culture	10.2%	10.3%	1%	3.71	3.42	0.96
Regional Cooperation	10.0%	10.1%	1%	3.76	3.38	0.86
Economic Development	10.2%	10.0%	1%	3.95	4.00	0.63
Workforce	10.1%	10.0%	2%	3.31	2.39	0.72
Effective Advocacy Program	10.2%	9.9%	1%	3.63	3.22	0.81
Membership Strength & Support	9.6%	9.9%	2%	3.76	3.34	0.79
Funding Support & Certainty	9.9%	9.7%	4%	3.36	2.50	0.87
Effective DMO Governance Model	9.6%	9.2%	2%	3.80	3.22	0.87

COMMUNITY SUPPORT & ENGAGEMENT - 0	3.25
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

RESULTING SCENARIO	EXPLORERS
--------------------	-----------

## Note

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.

# Community Support & Engagement – Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast- Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
Local Community Support	3.44	3.15	3.47	3.49	3.31	3.35	3.65	3.34	3.45	3.56
Industry Support	3.50	3.21	3.51	3.56	3.44	3.60	3.58	3.50	3.46	3.41
Hospitality Culture	3.42	3.63	3.28	3.61	3.17	3.02	3.62	3.22	3.47	3.35
Regional Cooperation	3.38	2.98	3.31	3.50	3.27	3.37	3.45	3.16	3.40	3.68
Economic Development	4.00	3.63	3.94	4.11	4.00	3.96	4.11	3.89	3.96	4.08
Workforce	2.39	2.77	2.18	2.40	2.56	2.52	2.75	2.44	2.05	2.10
Effective Advocacy Program	3.22	2.96	3.28	3.29	3.21	3.05	3.43	3.21	3.09	3.21
Membership Strength & Support	3.34	2.84	3.38	3.41	3.43	3.44	3.52	3.30	3.23	3.23
Funding Support & Certainty	2.50	2.01	2.30	2.68	2.43	2.33	2.58	2.36	2.45	2.99
Effective DMO Governance Model	3.22	2.73	3.11	3.31	3.31	3.17	3.62	3.18	3.21	3.01
COMMUNITY SUPPORT & ENGAGEMENT - Maine Average										3.25
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT										3.60

## RESULTING SCENARIO EXPLORERS

### Note

Green shading signifies that the region outperformed the destination average by greater than 0.2.

Yellow shading signifies that the region underperformed the destination average by greater than 0.2 but less than 0.4.

Red shading signifies that the region underperformed the destination average by greater than 0.4.

# Key Takeaways - Maine



What one thing would help the region become a more productive visitor destination?

1. Advertising & marketing
2. Visitor amenities & product development
3. Transportation

Factors	Aroostook	Downeast -Acadia	Highlands -Greater Bangor	Highlands -Other	Greater Portland & Casco Bay	Kennebec Valley	Mid- Coast	Maine Lakes & Mountains	The Maine Beaches
Advertising & Marketing	✓	✓	✓	✓	✓	✓	✓	✓	✓
Visitor Amenities & Product Development	✓	✓	✓	✓	✓	✓	✓	✓	✓
Engagement & Regional Support				✓					
Attractions & Entertainment						✓			
Transportation	✓	✓	✓		✓		✓	✓	✓

# Key Takeaways - Maine



What are the three biggest opportunities for expanding jobs and the economic benefits of the tourism industry?

1. Advertising, branding & marketing
2. Outdoor recreation & sports
3. Workforce

Opportunities	Aroostook	Downeast-Acadia	Highlands-Greater Bangor	Highlands-Other	Greater Portland & Casco Bay	Kennebec Valley	Mid-Coast	Maine Lakes & Mountains	The Maine Beaches
Outdoor Recreation & Sports	✓	✓		✓		✓		✓	
Advertising, Branding & Marketing	✓	✓	✓	✓		✓	✓	✓	
Accommodations				✓					
Conventions & Meetings					✓				
Food & Beverage						✓			
Attractions & Entertainment			✓						✓
Seasonality/Shoulder Seasons							✓		
Nature, Cultural, & Heritage Tourism	✓								
Workforce		✓			✓		✓		✓
Education & Training									
Planning & Experiential Product Development			✓					✓	✓
Transportation					✓				

# Key Takeaways - Maine



List up to three markets that you think have the most growth potential in the next three years.

1. Food & beverage
2. Outdoor recreation
3. Nature/wellness

Markets	Aroostook	Downeast-Acadia	Highlands -Greater Bangor	Highlands -Other	Greater Portland & Casco Bay	Kennebec Valley	Mid- Coast	Maine Lakes & Mountains	The Maine Beaches
Food & Beverage		✓	✓	✓	✓	✓	✓	✓	✓
Outdoor Recreation	✓	✓	✓	✓	✓	✓		✓	
Nature/Wellness	✓		✓	✓			✓	✓	✓
Niche Tourism Markets					✓	✓			✓
Arts/Culture/Heritage Tourism	✓	✓					✓		



# DESTINATION NEXT

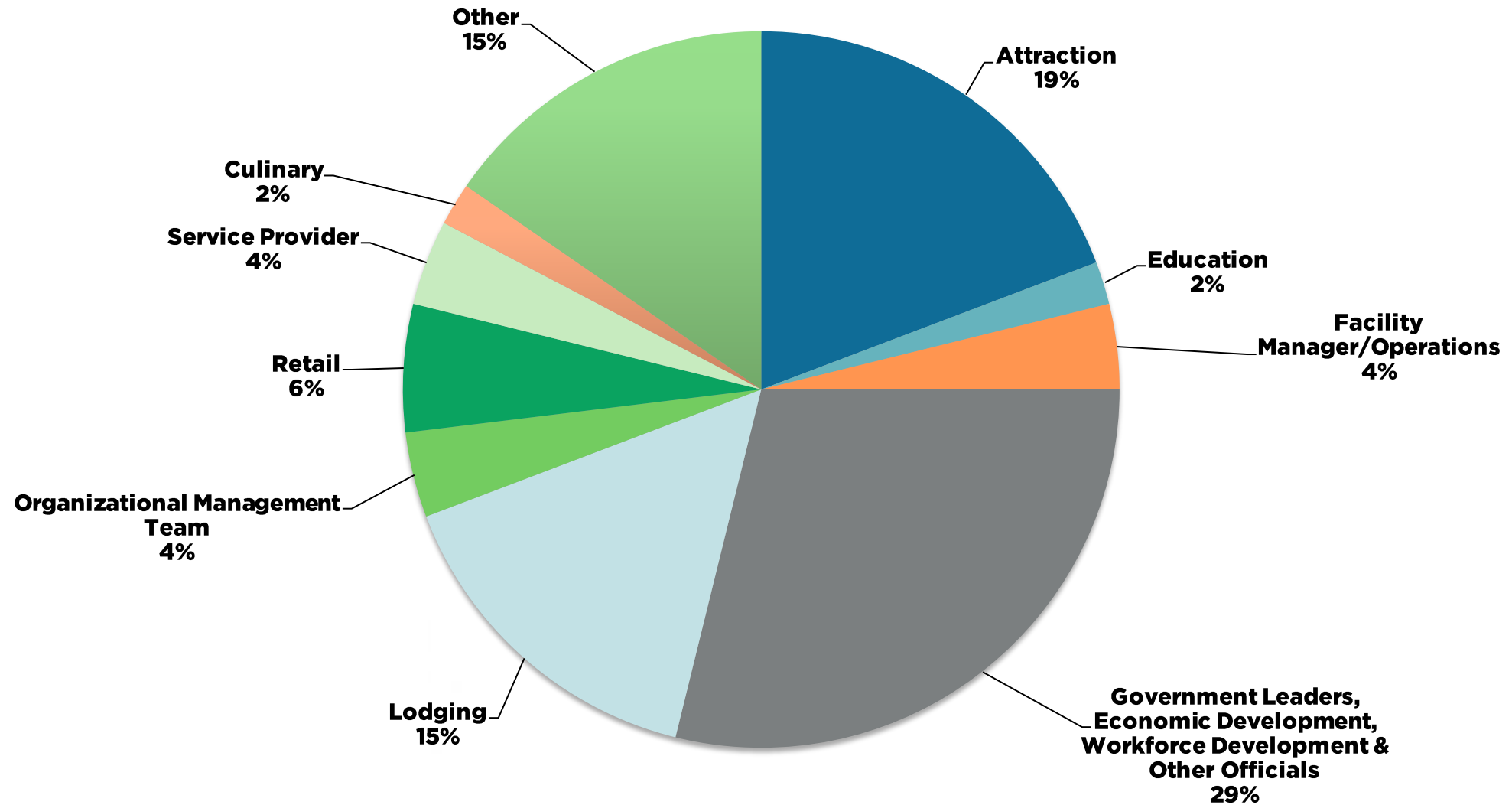
Multi-User Online Diagnostic  
Tool Results:

State of Maine Assessment -  
Aroostook

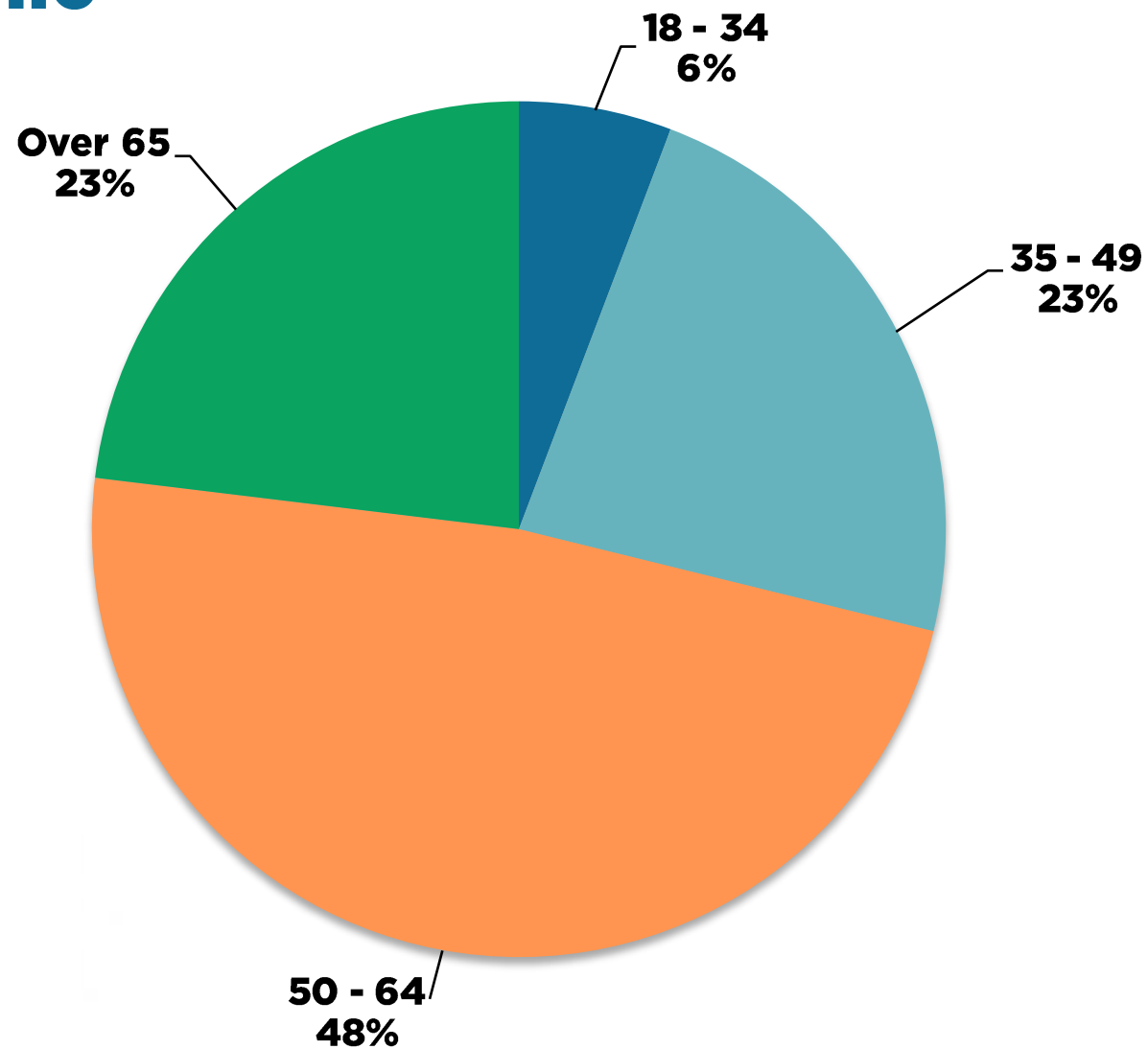
June 5, 2018



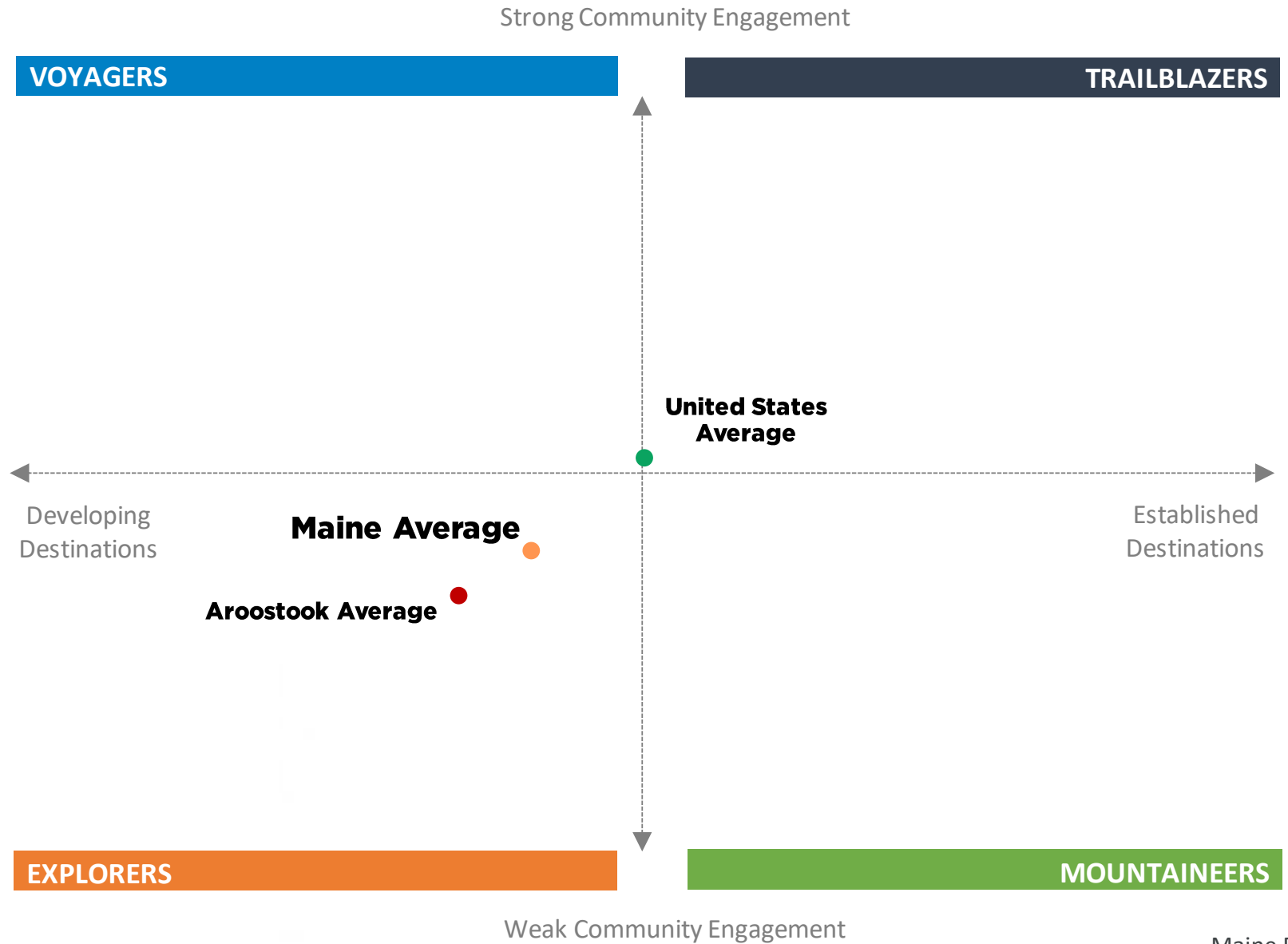
# 52 Responses



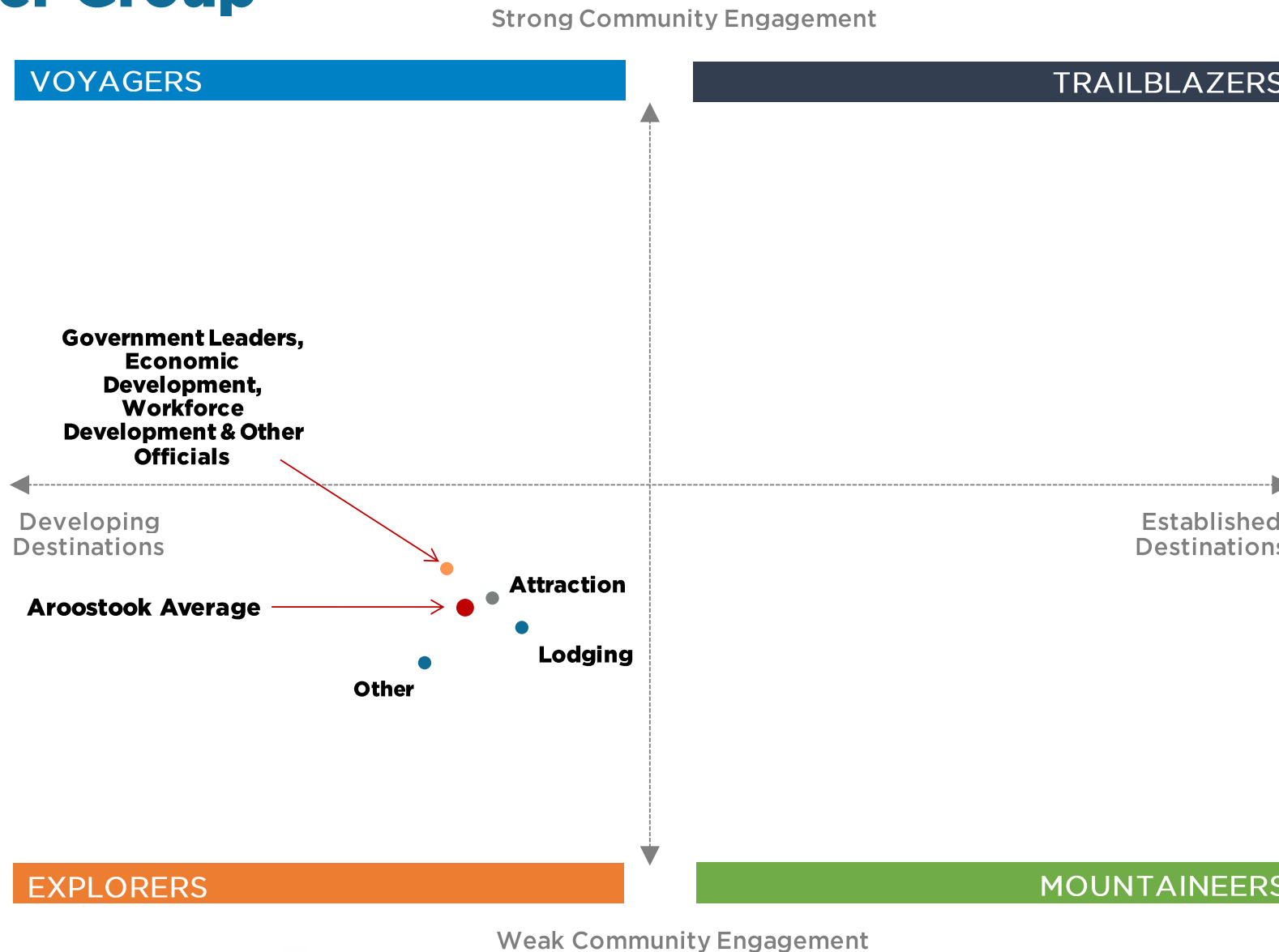
# Age Demographic



# Aroostook Overall Assessment - Industry

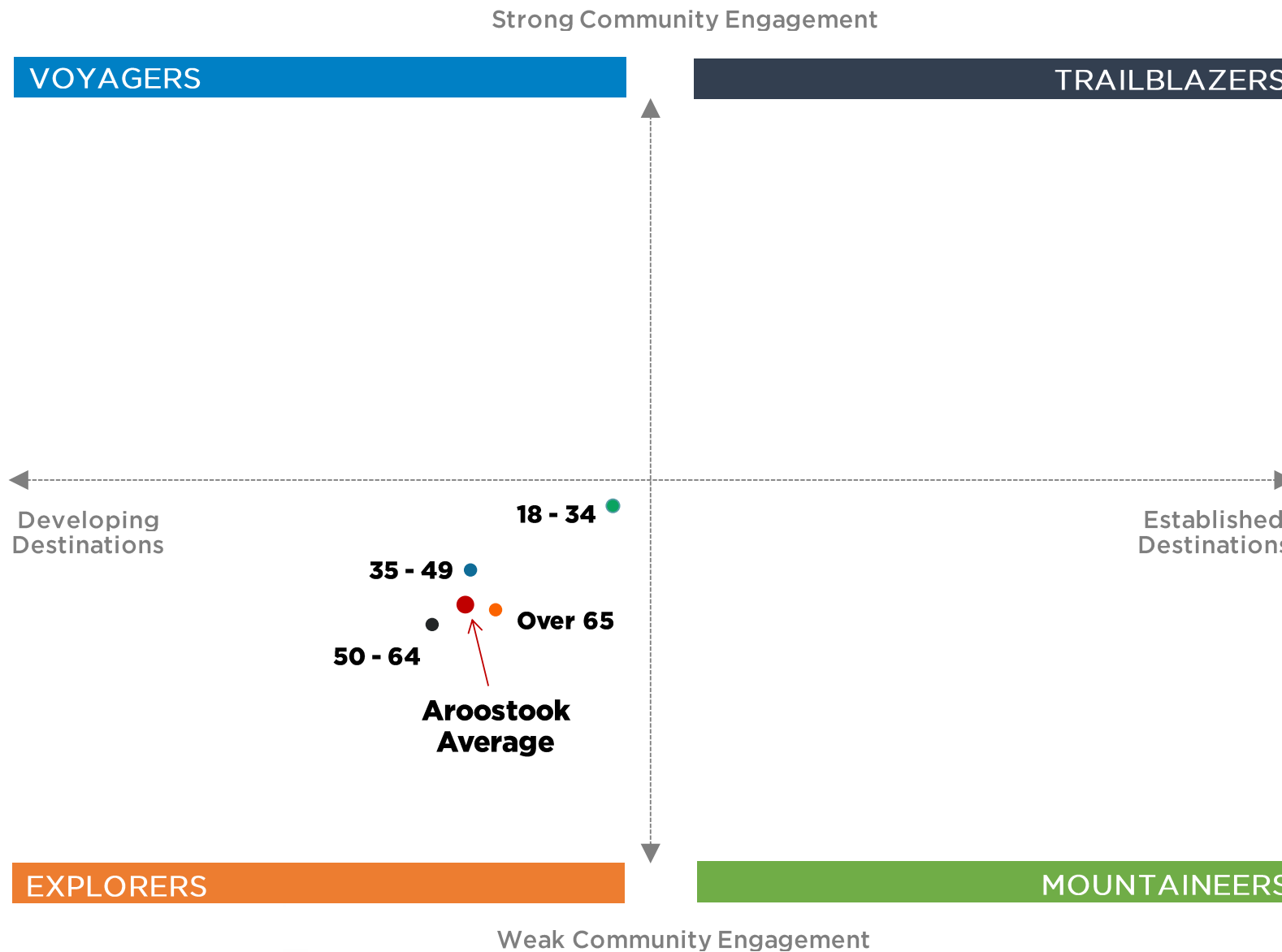


# Aroostook Overall Assessment – Stakeholder Group









# Aroostook Overall Assessment – Age



# Destination Strength Rankings – Aroostook



		Relative Importance	Perceived Performance
	Convention & Meeting Facilities	1 <sup>st</sup>	10 <sup>th</sup>
	Attractions & Entertainment	2 <sup>nd</sup>	5 <sup>th</sup>
	Accommodation	3 <sup>rd</sup>	8 <sup>th</sup>
	Mobility & Access	4 <sup>th</sup>	4 <sup>th</sup>

# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Aroostook Average	Standard Deviation	Industry Average	Aroostook Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.2%	0%	3.11	2.21	0.59
Attractions & Entertainment	10.8%	10.8%	0%	3.65	2.83	0.64
Accommodation	10.5%	10.7%	1%	3.54	2.67	0.60
Mobility & Access	10.1%	10.6%	0%	3.12	2.84	0.64
Destination Performance	10.0%	10.4%	1%	3.88	2.82	0.76
Sports & Recreation Facilities	9.4%	10.1%	1%	3.29	3.39	0.57
Brand	10.5%	9.7%	0%	3.49	3.36	0.60
Events	9.7%	9.0%	1%	3.63	3.17	0.77
Communication & Internet Infrastructure	10.1%	9.0%	1%	3.39	2.69	0.78
Air Access	9.2%	8.5%	0%	3.16	2.66	0.47

DESTINATION STRENGTH - Aroostook	2.85
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO EXPLORERS

**Note**

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

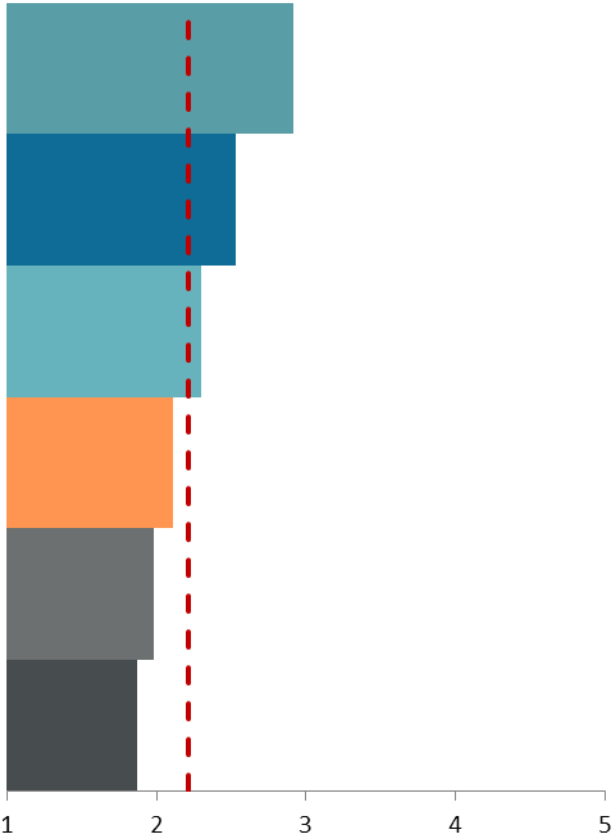
Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.



# Convention & Meeting Facilities

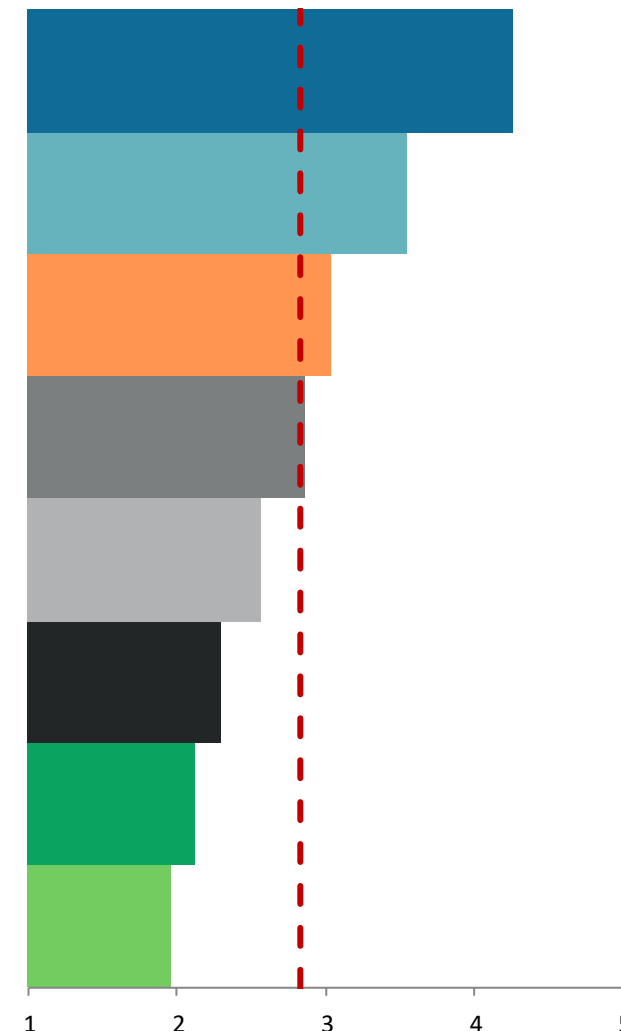
- Has good, unique off-site venues for special events
- Where possible, hotels/other meeting venues take full advantage of the views
- Has the necessary convention, meeting, and trade show facilities to compete today
- Offers an abundance of professional and experienced convention and/or meeting services suppliers
- Convention center meeting and networking space is well branded
- Has the necessary convention, meeting, and trade show facilities to compete for the next 25 years



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Attractions & Entertainment

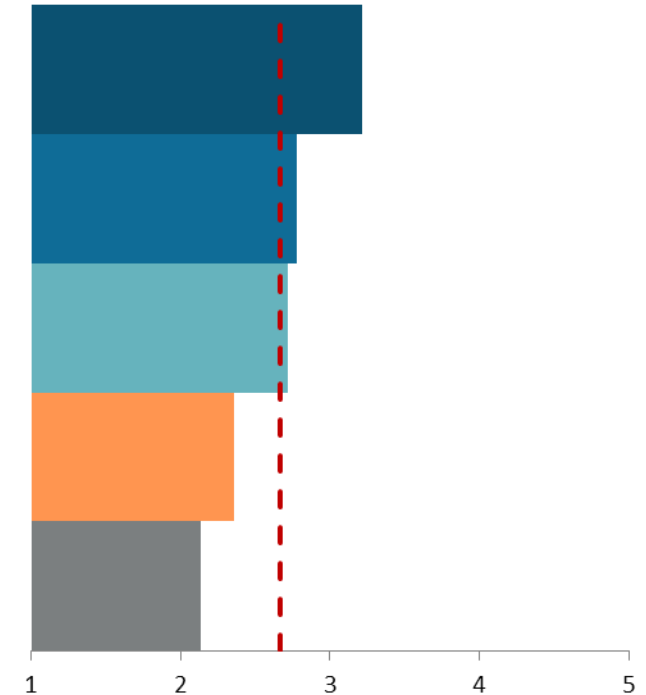
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)
- Has unique and high-quality dining options
- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors
- Has high-quality and wide-ranging arts and cultural attractions
- Has the type of large, famous attractions that cause people to stay (or plan to stay) an extra day
- Towns and cities offer diverse and high-quality shopping opportunities
- Suburban and/or rural areas offer diverse and high-quality shopping opportunities



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Accommodation

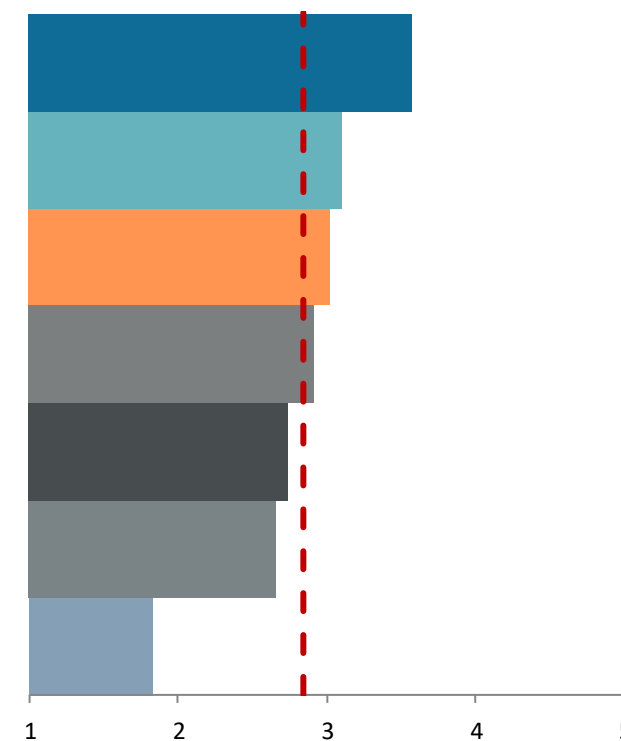
- Offers a diversity of accommodation price options
- Has adequate hotel accommodations capacity
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Has a healthy presence of well-known brand name hotels



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Mobility & Access

- Roads can easily handle residents, businesses and visitor traffic throughout the year
- Has adequate water access that makes it easy for visitors to get around
- Has great directional signage and highways that make it easy to get around
- Provides good access and mobility for those with disabilities
- There are a number of sufficient and visible information centers available to tourists
- Has adequate bike paths/pedestrian walkways that makes it easy for visitors to get around
- Has adequate public transportation that makes it easy for visitors to get around

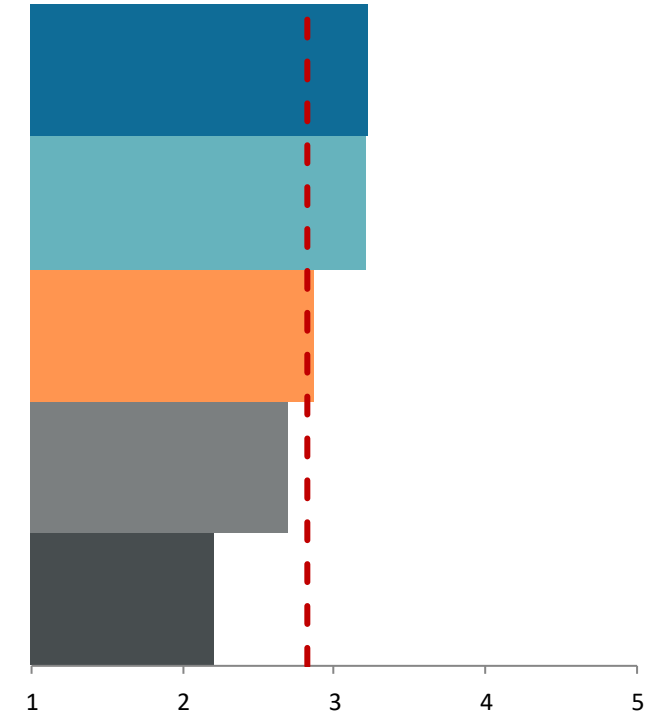


**Note**  
Red Dashed Line signifies the destination average for this individual variable.



# Destination Performance

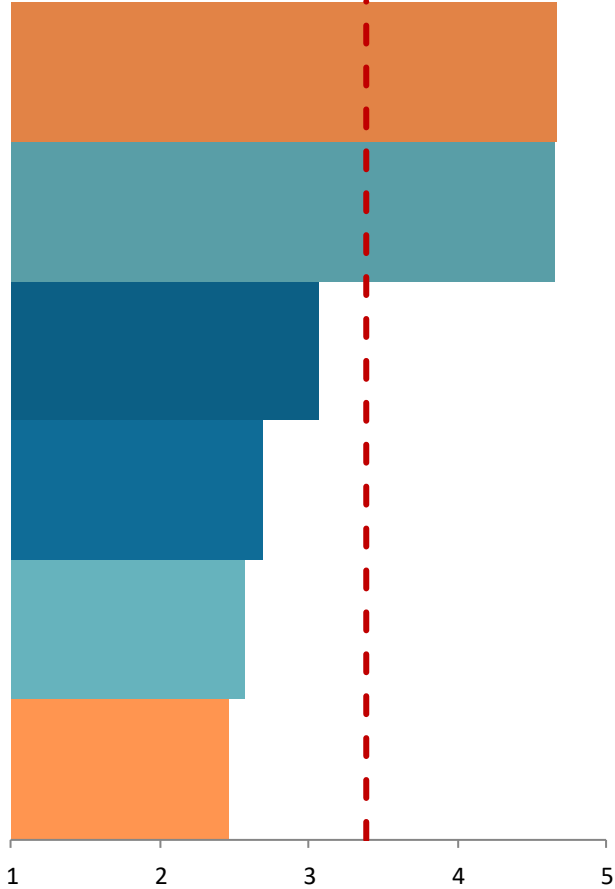
- Is experiencing a positive growth in overnight visitation
- Tourism industry performance is adequately measured and tracked
- Hotels are performing well (e.g. Occupancy, RevPAR)
- The tourism industry does a good job at communicating the performance and economic impact to the public
- Is successfully attracting meetings and conventions



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Sports & Recreation Facilities

- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- Has the sports fields and availability to host major amateur and/or collegiate sporting events
- Leadership representing sports and recreational facilities are engaged and helpful in pursuing recreational and sporting events for the region
- Has the venues to host major professional sporting events
- The Maine Sports Commission is a useful resource and is properly utilized throughout the region



**Note**  
**Red Dashed Line signifies the destination average for this individual variable.**

# Brand

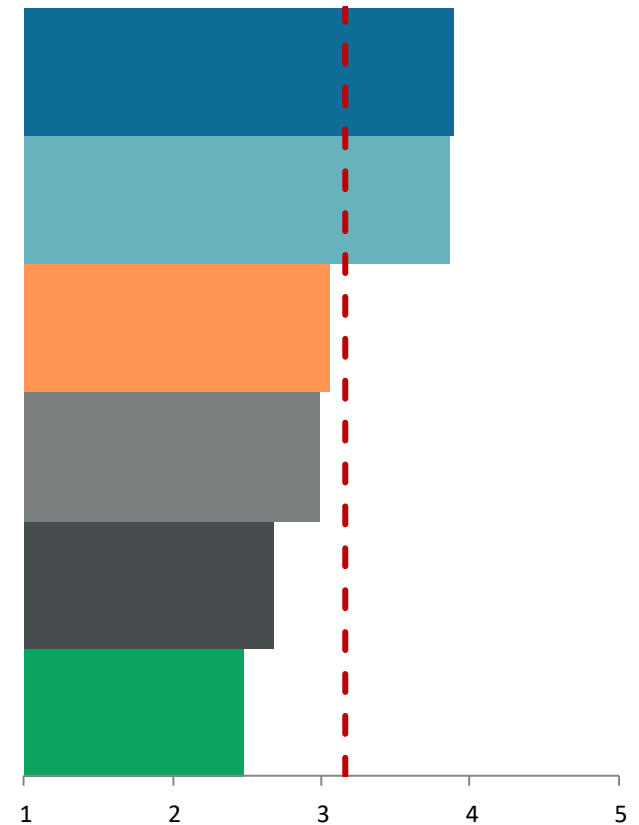
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for being environmentally conscious and sustainable
- Appeals to a diverse range of visitors
- Is known for having a lot of things to see and do
- Is prepared for international tourism with adequate translations and guides
- Has an effective region-wide marketing message



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Events

- The citizens of the region are supportive of hosting major sporting/national or international events
- Has an abundance of parks and outdoor spaces for handling special events
- Government is cooperative and supportive in attracting and hosting major events
- Offers major events that attract non-local visitors
- Local venues produce numerous public/lifestyle shows throughout the year for residents to enjoy
- Has diverse and quality facilities/venues with capacity/availability to host major events

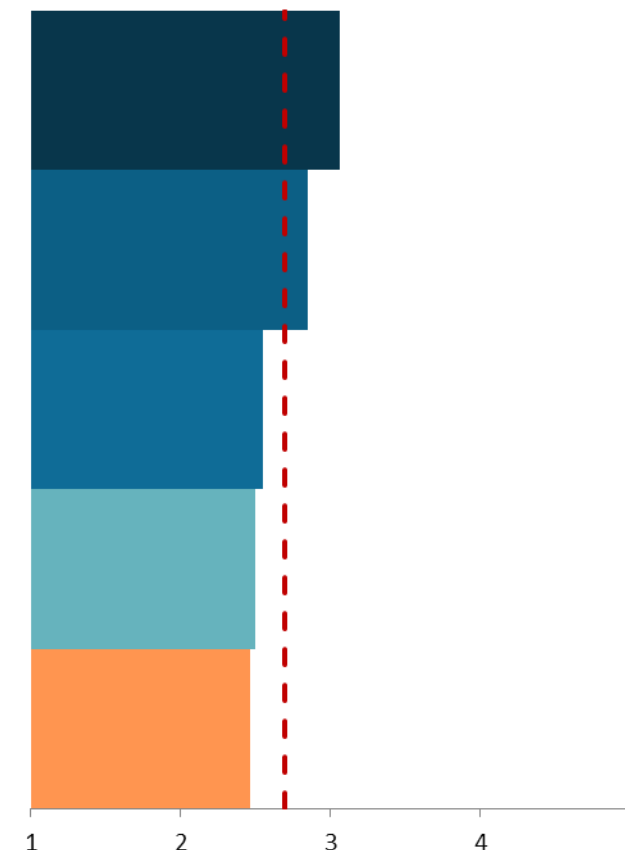


**Note**  
Red Dashed Line signifies the destination average for this individual variable.



# Communication & Internet Infrastructure

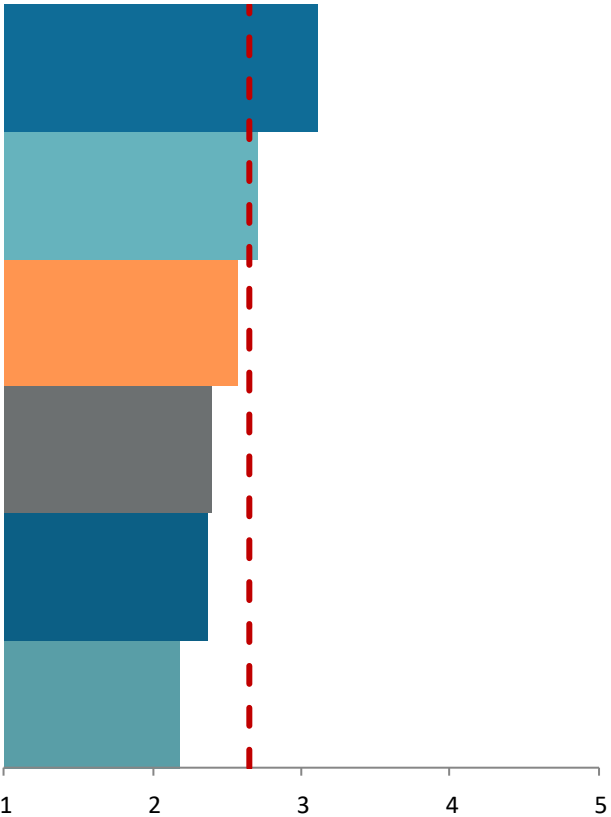
- Tourism industry uses and leverages social media to support the brand and market
- There is substantial Wi-Fi access in region's meeting/convention facilities
- Offers sufficient free Wi-Fi in outdoor/public areas with high visitor traffic
- There is reliable mobile phone service covering all of the region's attractions
- Businesses have access to good broadband capacity to be able to run their businesses effectively



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Air Access

- Local airport has the facilities to grow tourism in the region
- Local airport offers a "sense of place" that supports the brand and promotes the region and state
- Has adequate domestic air access through airports (number of flights/capacity)
- Has adequate international air access through airports (number of flights/capacity)
- Has adequate domestic air access through airports (# of carriers/low-cost options)
- Has adequate international air access through airports (# of carriers/low-cost options)



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Community Support & Engagement – Aroostook



Local Community Support

1<sup>st</sup>

4<sup>th</sup>



Hospitality Culture

2<sup>nd</sup>

1<sup>st</sup>



Economic Development

3<sup>rd</sup>

2<sup>nd</sup>



Industry Support

4<sup>th</sup>

3<sup>rd</sup>

# Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Aroostook Average	Standard Deviation	Industry Average	Aroostook Average	Standard Deviation
Local Community Support	10.2%	10.5%	1%	3.56	3.15	0.96
Hospitality Culture	10.2%	10.4%	1%	3.71	3.63	1.09
Economic Development	10.2%	10.3%	1%	3.95	3.63	0.78
Industry Support	9.9%	10.2%	0%	3.81	3.21	0.97
Workforce	10.1%	10.2%	1%	3.31	2.77	0.65
Regional Cooperation	10.0%	10.1%	0%	3.76	2.98	0.91
Effective Advocacy Program	10.2%	9.9%	0%	3.63	2.96	0.85
Membership Strength & Support	9.6%	9.7%	1%	3.76	2.84	0.82
Funding Support & Certainty	9.9%	9.6%	1%	3.36	2.01	0.70
Effective DMO Governance Model	9.6%	9.0%	1%	3.80	2.73	1.07

COMMUNITY SUPPORT & ENGAGEMENT - Aroostook	3.01
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

RESULTING SCENARIO	EXPLORERS
--------------------	-----------

## Note

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

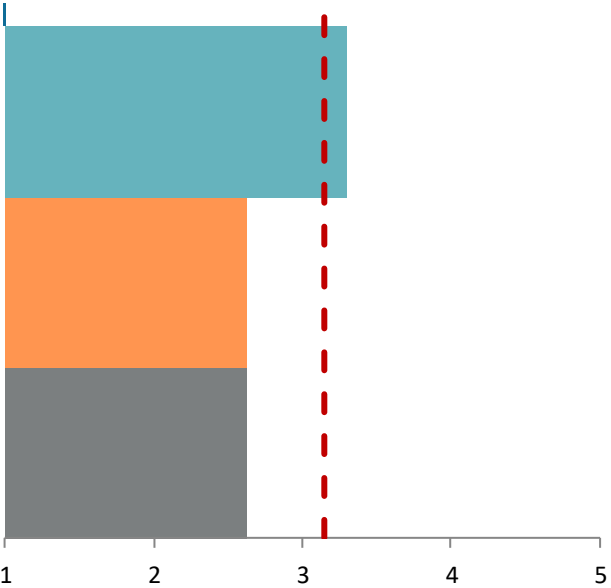
Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.



# Local Community Support

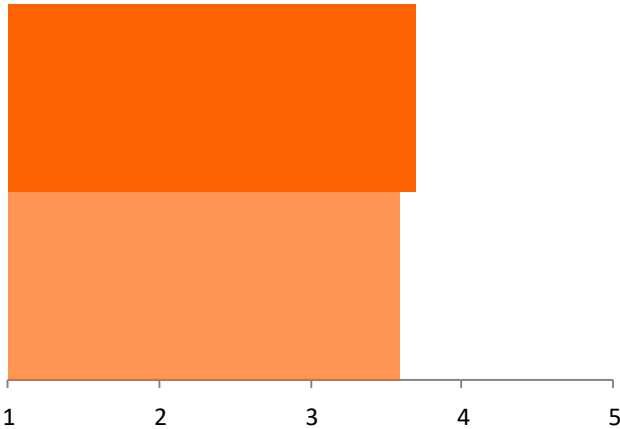
- The region's tourism industry has business support
- The region's tourism industry gets positive media coverage
- Stakeholders find value in partnerships that include other tourism regions



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

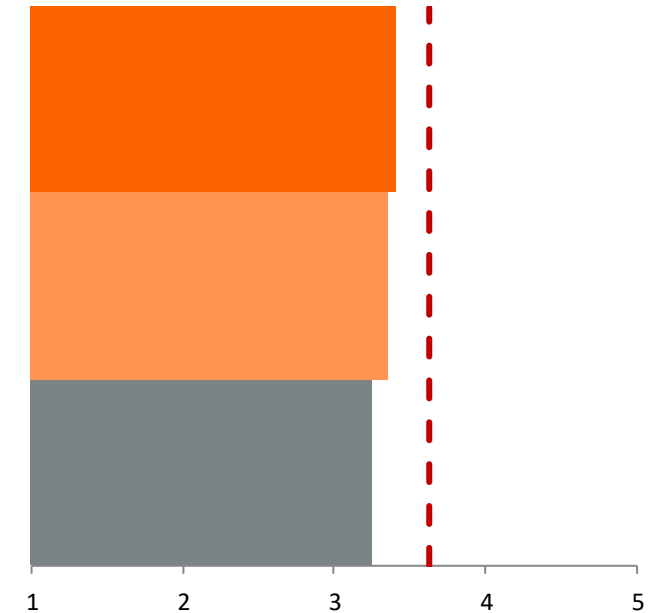
# Hospitality Culture

- The region has a reputation for offering high-quality customer service
- The region has a hospitality-minded culture that welcomes visitors and improves their experience



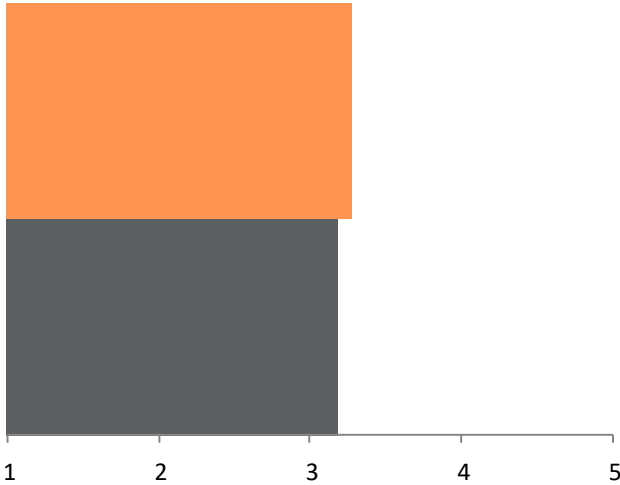
# Economic Development

- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business development
- Tourism industry has a good working relationship with local chambers and/or economic development agencies
- Tourism is identified as a key economic driver for the region



# Industry Support

- Tourism industry leaders and stakeholders are supportive of the regional tourism industry
- Tourism industry leaders and stakeholders are investing in activities

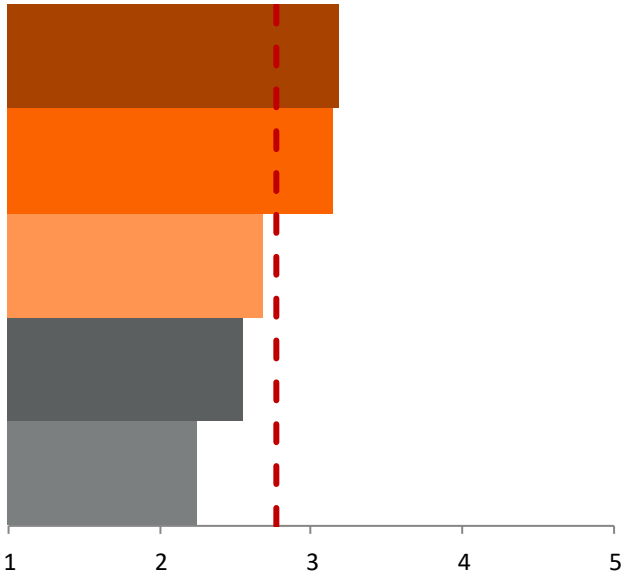


**Note**  
Red Dashed Line signifies the destination average for this individual variable.



# Workforce

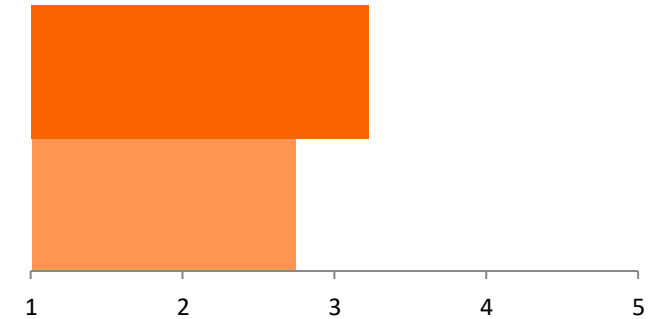
- The H2B visa restrictions have not affected businesses that cater to tourists or the hospitality industry workforce
- The increase in rents and home prices has not affected the industry in terms of attracting employees
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The region’s workforce is stable and has a positive labor relations environment
- The region has a strong base of hospitality education programs



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

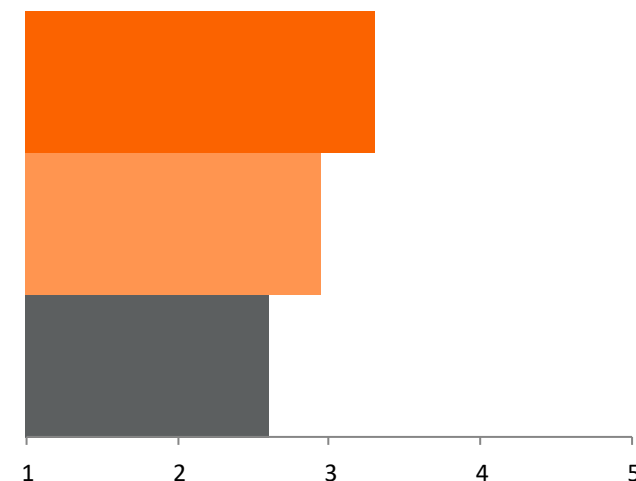
# Regional Cooperation

- Tourism marketing efforts have broad economic benefits across the region
- There is broad collaboration and coordination among tourism partners in the region



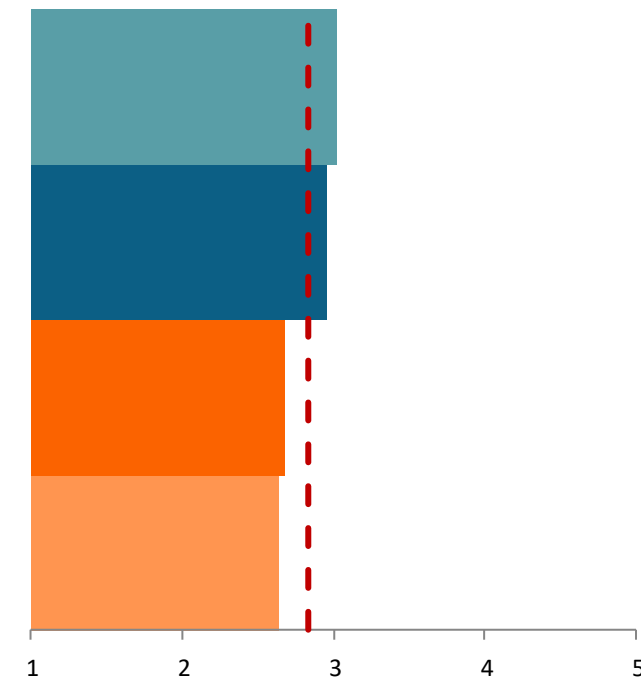
# Effective Advocacy Program

- Local government is supportive of the tourism industry
- Local government relies on tourism stakeholders for input on the destination
- Tourism advocacy programs are successful in educating/informing government policy and regulatory matters



# Stakeholder Strength & Support

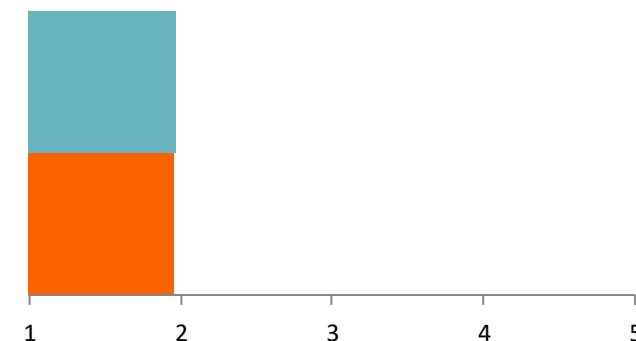
- Stakeholders find value in region-wide partnerships
- Stakeholders are active, engaged and supportive of tourism development
- Stakeholders are active, engaged and supportive of tourism marketing
- Stakeholders find value in partnerships that include other tourism regions



**Note**  
Red Dashed Line signifies the destination average for this individual variable.

# Funding Support & Certainty

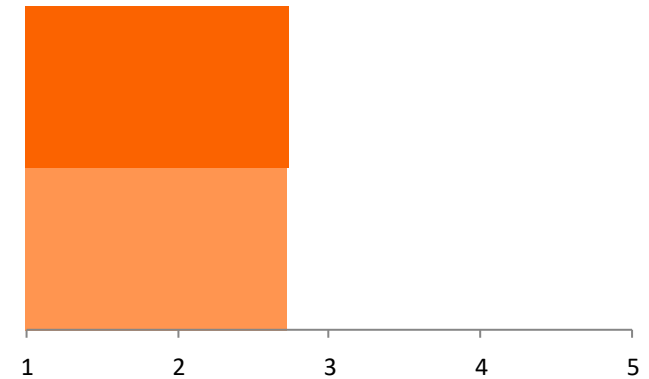
- There is stable funding to attain tourism mission of growth of economic activity and improved quality of life
- There is sufficient funding to attain tourism mission of growth of economic activity and improved quality of life





# Effective Destination Organization Governance Model

- Local leaders are engaged in the governance structure of organizations
- Organizations that impact tourism have an effective organizational structure



# Key Takeaways - Aroostook

- **Currently in Explorers quadrant with below industry average destination strength and community support & engagement**
- **There is strong alignment between stakeholder groups on the perception of the destination**



## Destination Opportunities

- **Meeting facilities**
- **Iconic attractions**
- **High-quality shopping**
- **Well-known branded hotels**
- **Public transportation**
- **Major events & sporting event venues**
- **Regional marketing message**
- **Broadband & mobile coverage**
- **Air access**



## Community Support & Engagement Opportunities

- **Community support**
- **Funding**
- **Stakeholder support**
- **Regional collaboration**
- **Effective advocacy programs**
- **Workforce**
  - **Hospitality education programs**
  - **Stable and positive labor environment**

# What one thing would help the region become a more productive visitor destination?

## **Advertising, Marketing, PR & Branding (40%)**

- Strategic Marketing (Regional, targeted, value based, Private/Public partnerships)
- More cohesive thought into promoting the county as a whole as well as keeping up to date on the changing media landscape. We need to meet people where they are and we aren't always there representing in a way that makes a personal connection
- Increased awareness of the amenities available in this region
- Additional electronic marketing and website presence

## **Visitor Amenities & Experiential Product Development (18%)**

- A combine of area attraction listed as a package deal
- Higher quality accommodations and food choices
- Listing all tourist attractions
- Variety of goods and services
- A resort

## **Transportation Infrastructure (14%)**

- Improved transportation infrastructure
- Continued transportation improvements
- Signage
- Transportation to/from the area
- Better roads

# What are the biggest opportunities for expanding jobs and the economic benefit of the tourism industry?

## **Outdoor Recreation & Sports (23%)**

- **Trails. Snowmobiling, biking, Atving**
- **Expand and promote outdoor winter and summer sport**
- **Aroostook is already known as a top 10 snowmobiling destination for both US and Canada**
- **Camping/Fishing/Hiking**
- **Hunting opportunities/ deer herd**
- **Outdoor experience**

## **Advertising, Marketing & Promotion (18%)**

- **Share/provide information for visitors to enhance their stay in the area...look for the unusual places to share with them**
- **Communication about community events**
- **Marketing directly to results of segmented avatars**
- **Better event advertising**
- **Promotion of Aroostook as a summer destination**
- **Increased visibility**

## **Nature, Heritage & Cultural Tourism (16%)**

- **Arts/culture/heritage**
- **Develop more ecotourism**
- **Rural community with rich culture and agricultural & forestry tradition**
- **Increase quality of cultural offerings of three regions in Aroostook county**
- **Historical interpretation**
- **Culture and place - have excellent products but need resources to support them**
- **Many of our local attractions are nature-based/readily available**

# What are the top tourism issues to address?

## **Advertising, Marketing & Promotion (25%)**

- **A unified marketing plan and effective marketing strategy for entire region to know and follow**
- **Well coordinated packaging of trips**
- **Promoting "low-impact" outdoor recreation offerings**
- **Marketing - we need more money to properly promote**
- **Organized/regionalized marketing/etc.**

## **Transportation Infrastructure & Access (13%)**

- **Perceived Distance and time needed to travel to The County**
- **Limited Airports**
- **Access - it's hard to get here!**
- **Unprepared infrastructure/roads**
- **Winter weather and roads maintenance**

## **Accommodations (12%)**

- **Poor accommodation options**
- **More upscale opportunities**
- **Lack of good, clean lodging**
- **Event-based lodging. We have had large events occasionally (once or twice a year), and a potential for more, but the lodging can not accommodate that many people and can't financially maintain post-event**
- **Make a database from all motels and hotels, so they can be invited next season**



# List 3 markets that have the most growth potential in the next 3 years

## Outdoor Recreation & Adventure (43%)

- Snowmobiling, skiing, winter sports since we have 6 months of it up north!
- Outdoor recreation winter and summer (hiking/snowmobiling/skiing/bike tours/canoeing/kayaking/fishing/hunting/bird-watching, etc)
- Outdoor adventure tourism
- Camping
- Biking e.g. More BikeMaine like tours

## Nature, Wellness & Eco-Tourism (11%)

- “Digital detox” - camping - either with or without electricity, but limited cell phone/internet coverage)
- Eco-tourism
- Nature lovers of all dimensions - birders, canoeists, etc. those people who don't need fancy places to stay but really want to experience the reality of the place
- Foliage tours
- Birding (see Sackville Water Fowl Park)
- Beauty of landscape

## Arts. Culture & Heritage (9%)

- Acadian culture, food, scenic byways of land and forest, culinary influence of native American, Canadian, Acadian and more.
- Themed tours (culinary, cultural, eco)
- Historical Destinations
- Acadian heritage events, family reunions etc.
- Arts/culture/heritage

# How will the legalization of marijuana positively or negatively affect the region?

## Neutral/Minimal Impact (43%)

- No good information on this topic. Rules have not been finalized
- Not sure yet... I know our Police Department is on alert, but we are taking it step by step. We are educating ourselves in hopes of staying ahead of it!
- Does not seem to have done either. The narcotic drug pandemic is a negative
- I don't believe this will have an impact on tourism to the region

## Negative (30%)

- Aroostook county what's left will be even more damaged
- I believe it will negatively impact the region with an increase in crime and motor vehicle accidents
- The referendum was defeated by a 2:1 margin in Aroostook. Most residents do not want it, but it remains to be seen how retail opportunities may affect this very conservative region
- Will negatively affect the region with the promotion of a gateway drug that will lead to even less worker effectiveness

## Positive (18%)

- Positive impact in my opinion. Growth in retail sales, tax revenue, and recognition for the factual basis for its value, not on reefer madness of the past.
- It will be positive, all the states that legalize will have a higher tax revenue in order the repair road, bridges etc.
- Marijuana is here to stay. Let's regulate it and use the tax \$ to our advantage
- Very positive for Maine. It will make a healthier and prosperous Maine. And help tourism



# Transformational Opportunities



## #1: Broadcast to Engagement

Interacting with & leveraging the new marketplace



## #2: Brand Building

Building & protecting the destination brand



## #3: Collaboration & Partnerships

Evolving the DMO business model

# Thank You!

[paul.ouimet@nextfactorinc.com](mailto:paul.ouimet@nextfactorinc.com)

