

DESTINATION NEXT

Maine Statewide Assessment – Lake & Mountains

June 7, 2018

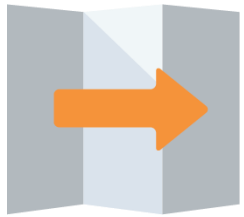


Paul Ouimet

DestinationNEXT

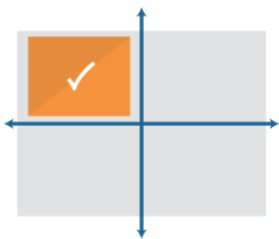
Vision:

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

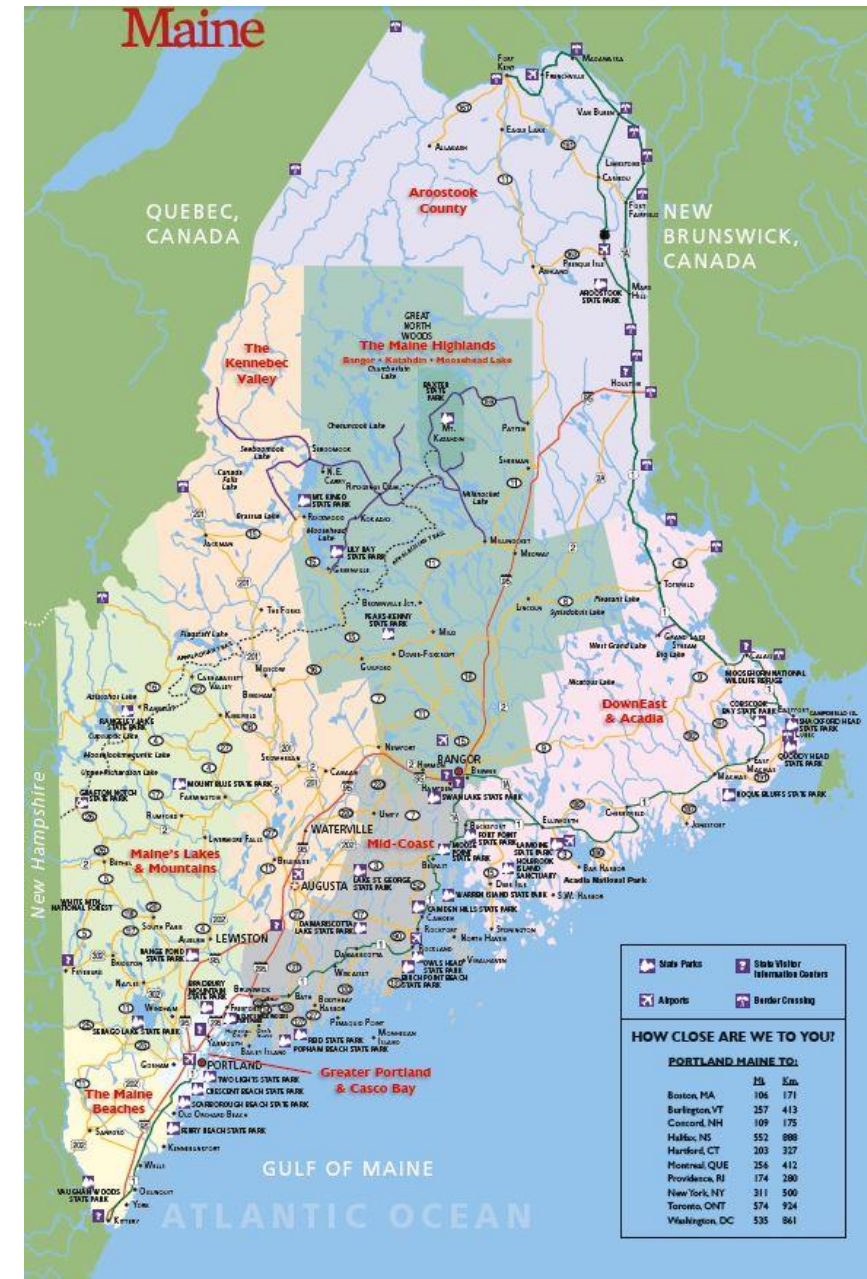
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

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

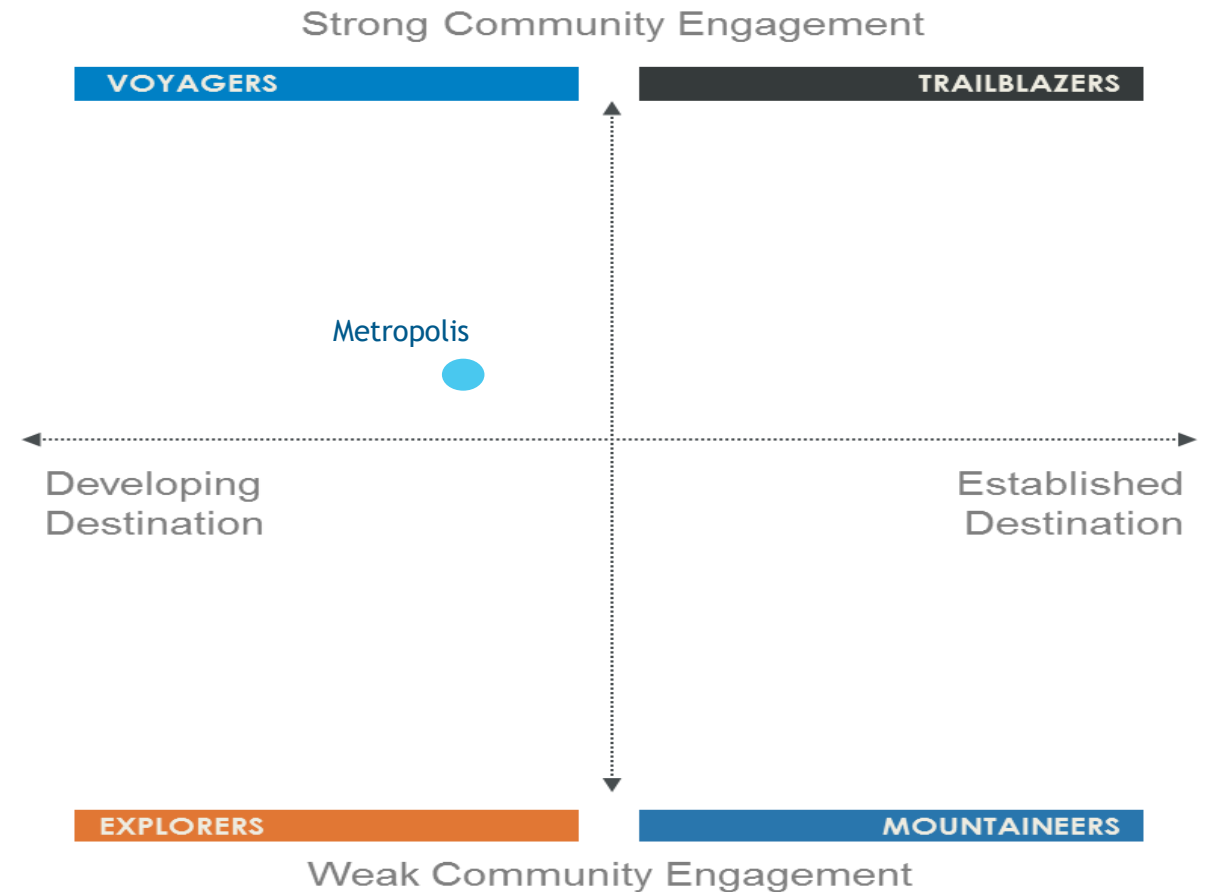
Scenario Model



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**



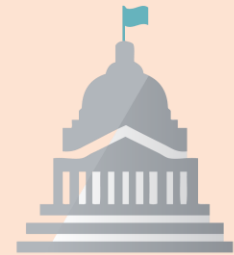
**Membership Strength
& Support**



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

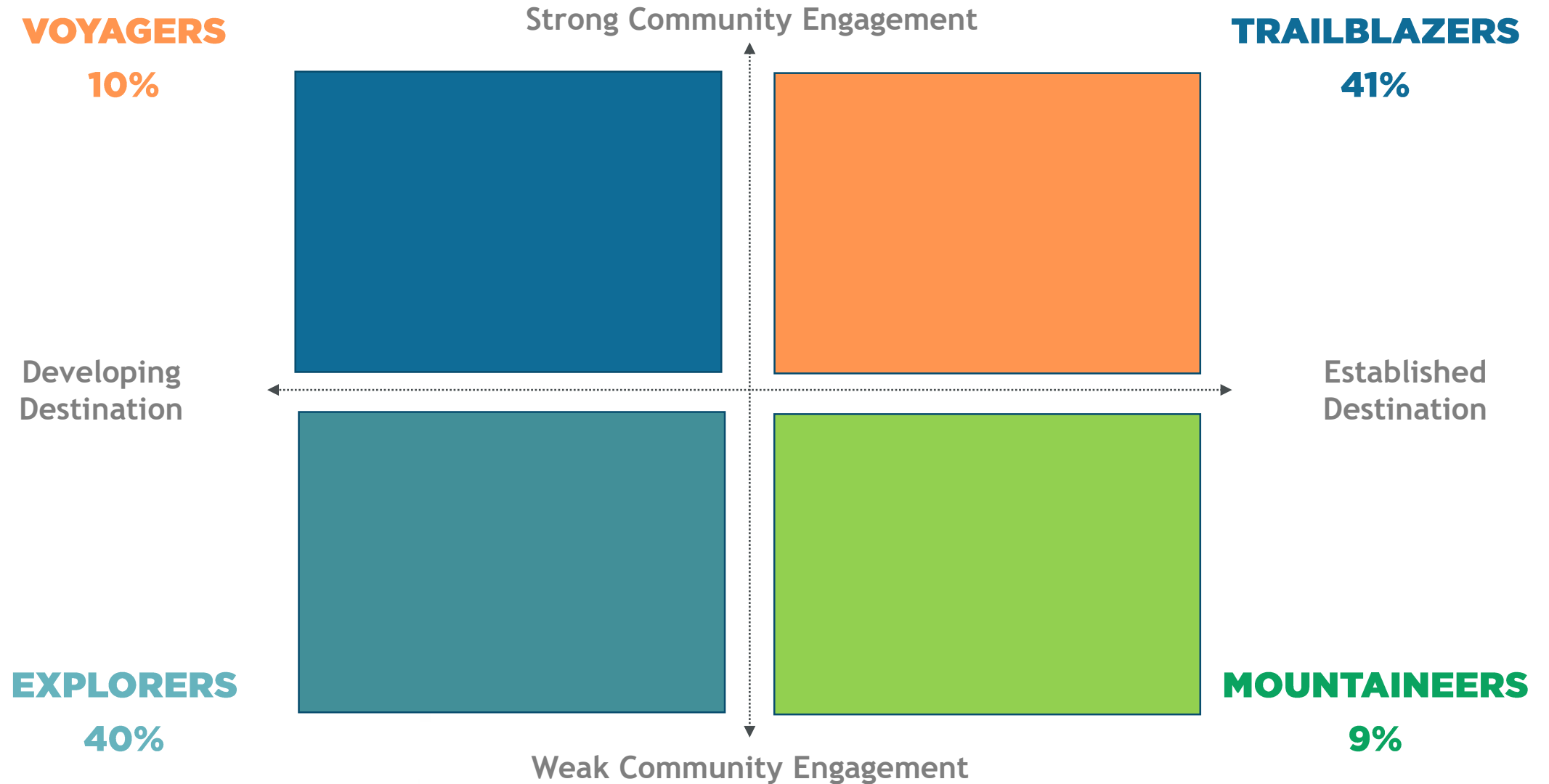


**Northwest Florida
Tourism Coalition**

**South Africa
Convention Bureau**

Global **Results**

Scenario Model



Destination Strength Rankings – Global Averages



Relative Importance



Brand

1st



Destination Performance

2nd



Attractions & Entertainment

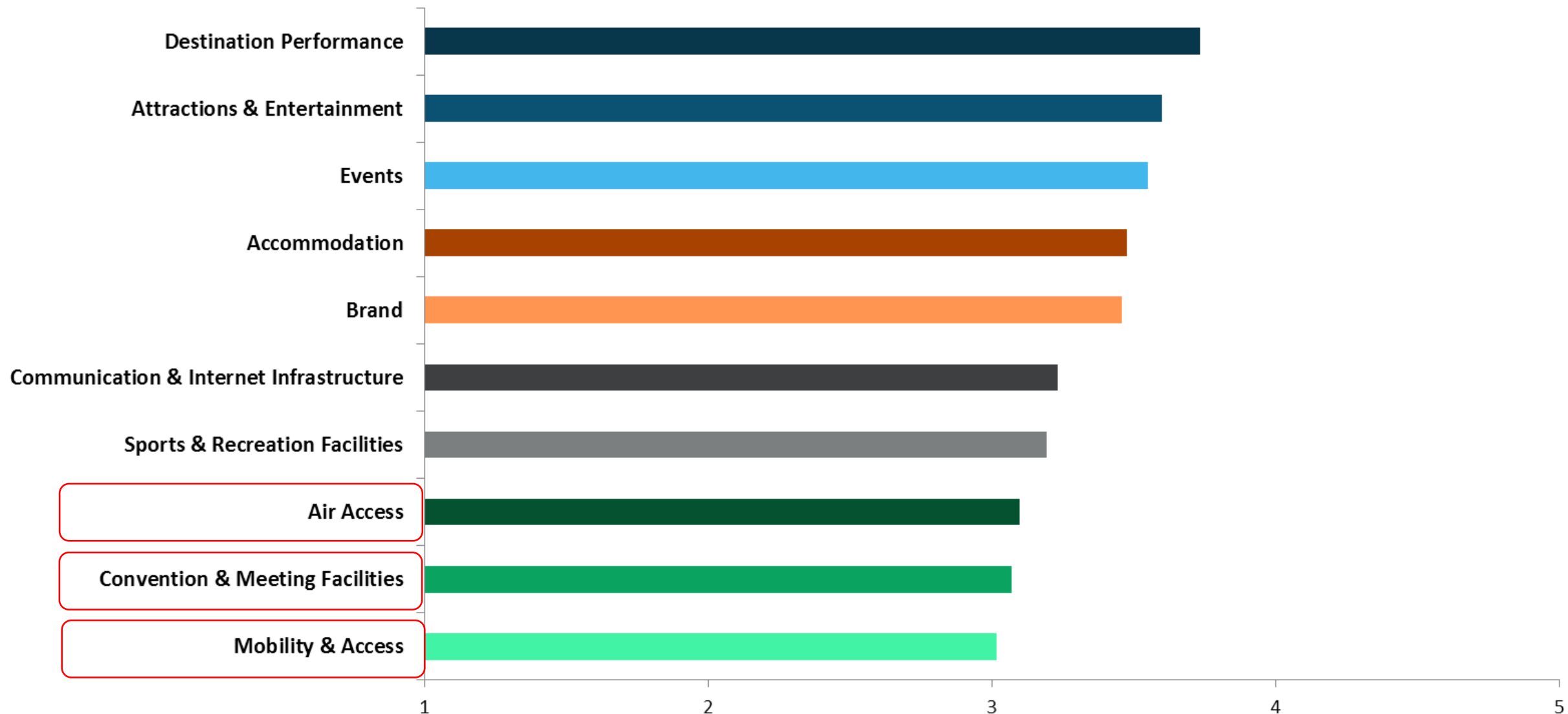
3rd



Accommodation

4th

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

1st



Industry Support

2nd



Effective Destination Organization
Governance Model

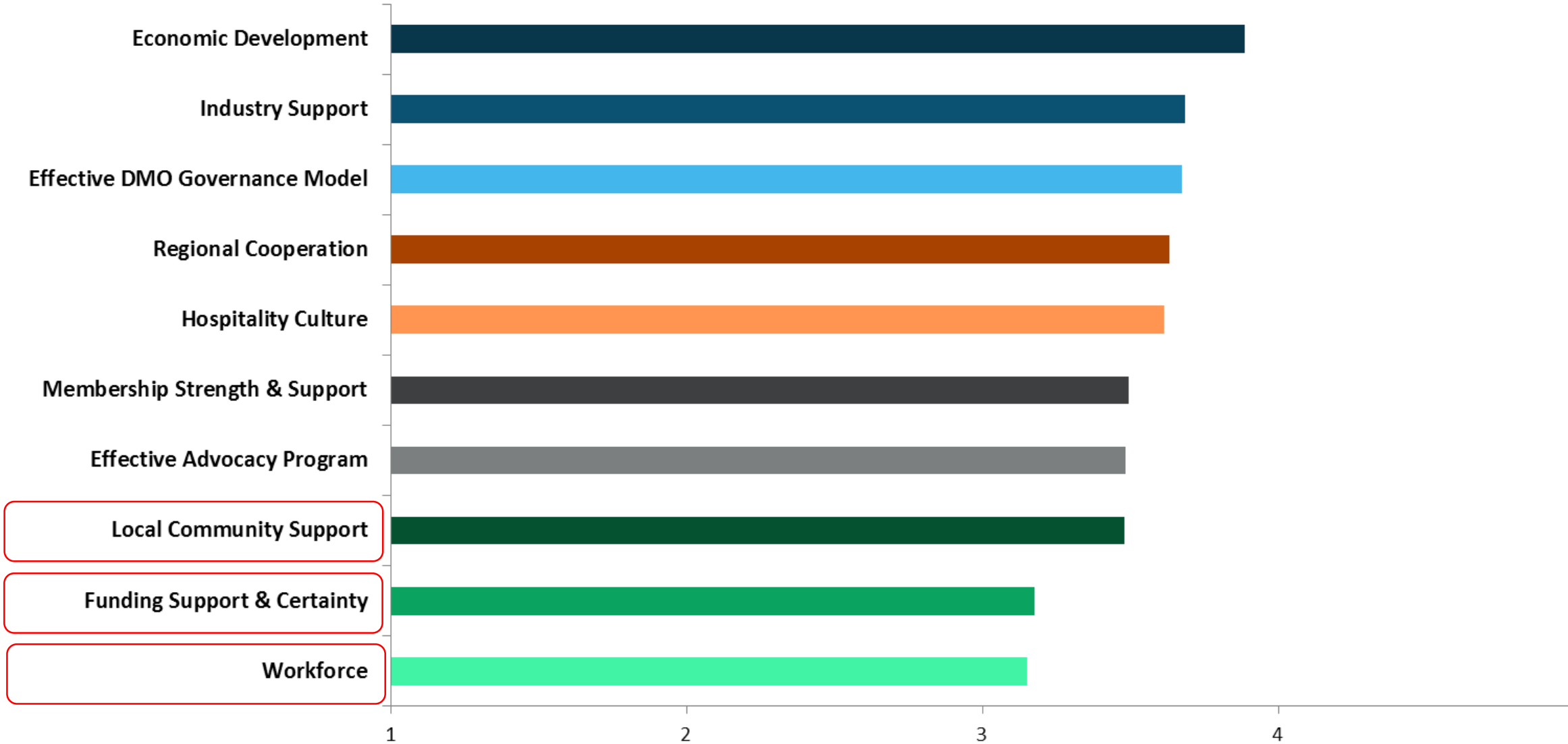
3rd



Local Community Support

4th

Community Support & Engagement Performance



Workforce

- Workforce retention
- Labor relations environment



Funding Support & Certainty

- Sufficient revenue sources



Local Community Support

- Support from local residents and media



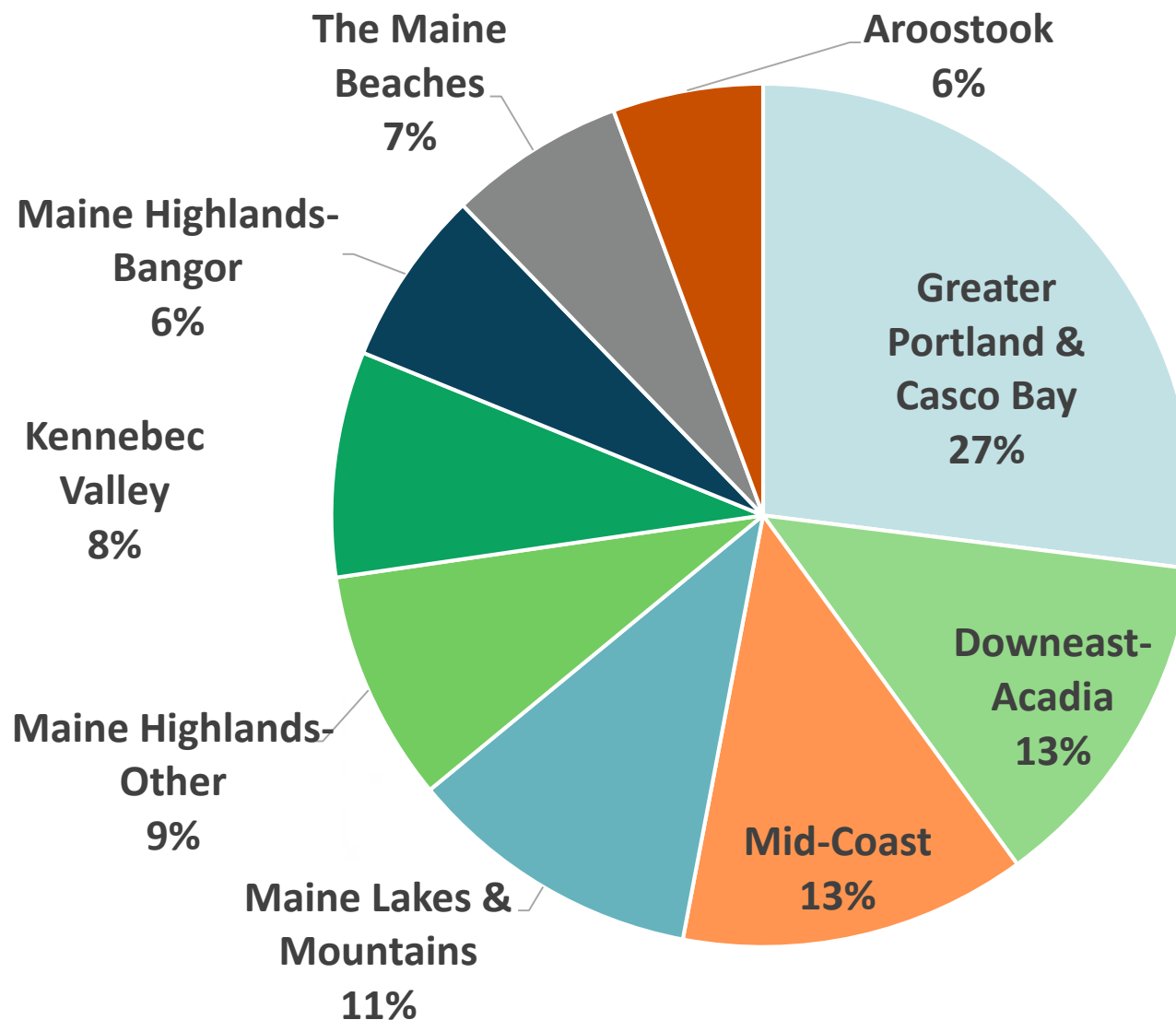
DESTINATION NEXT

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

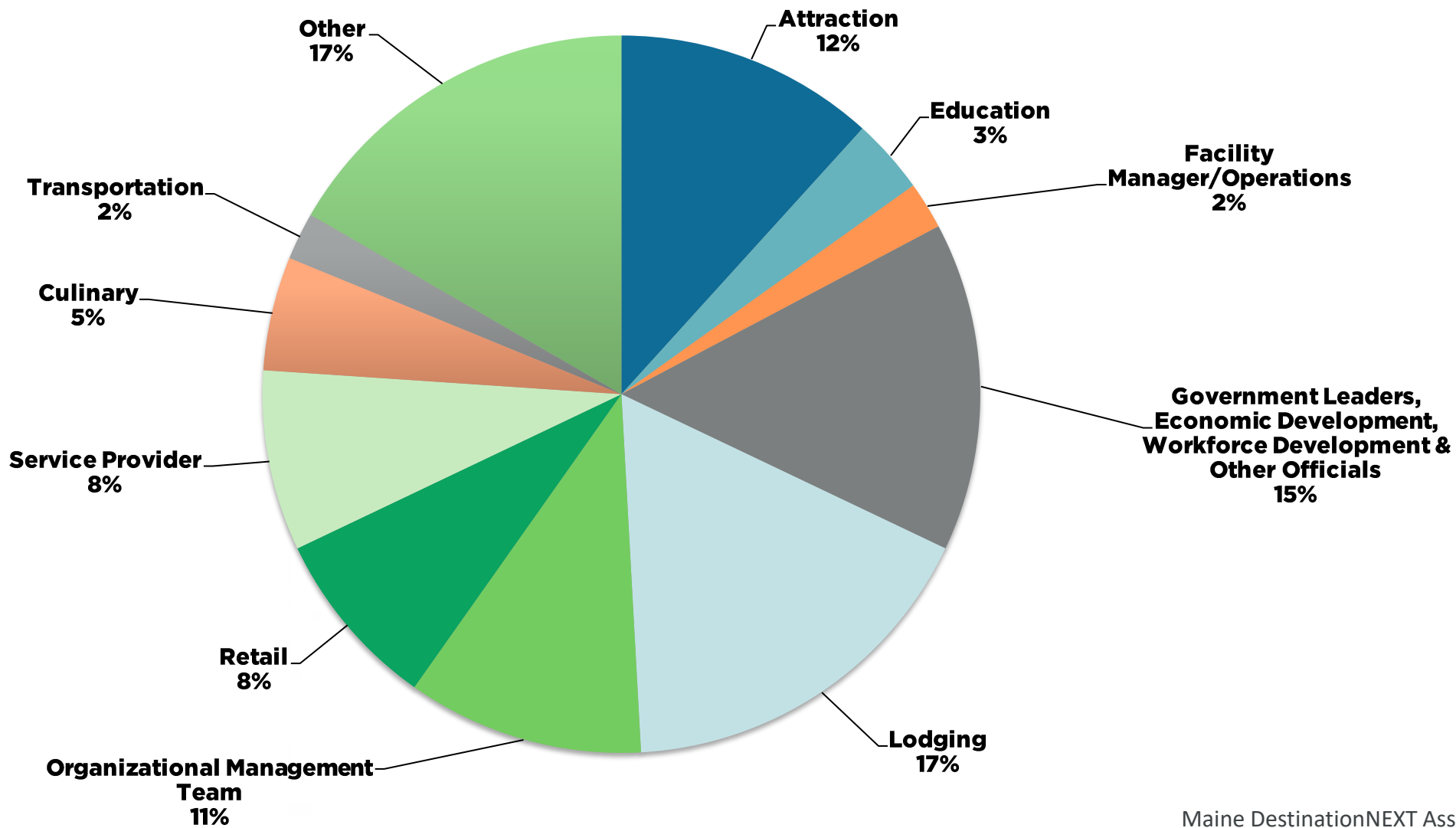
March 29, 2018



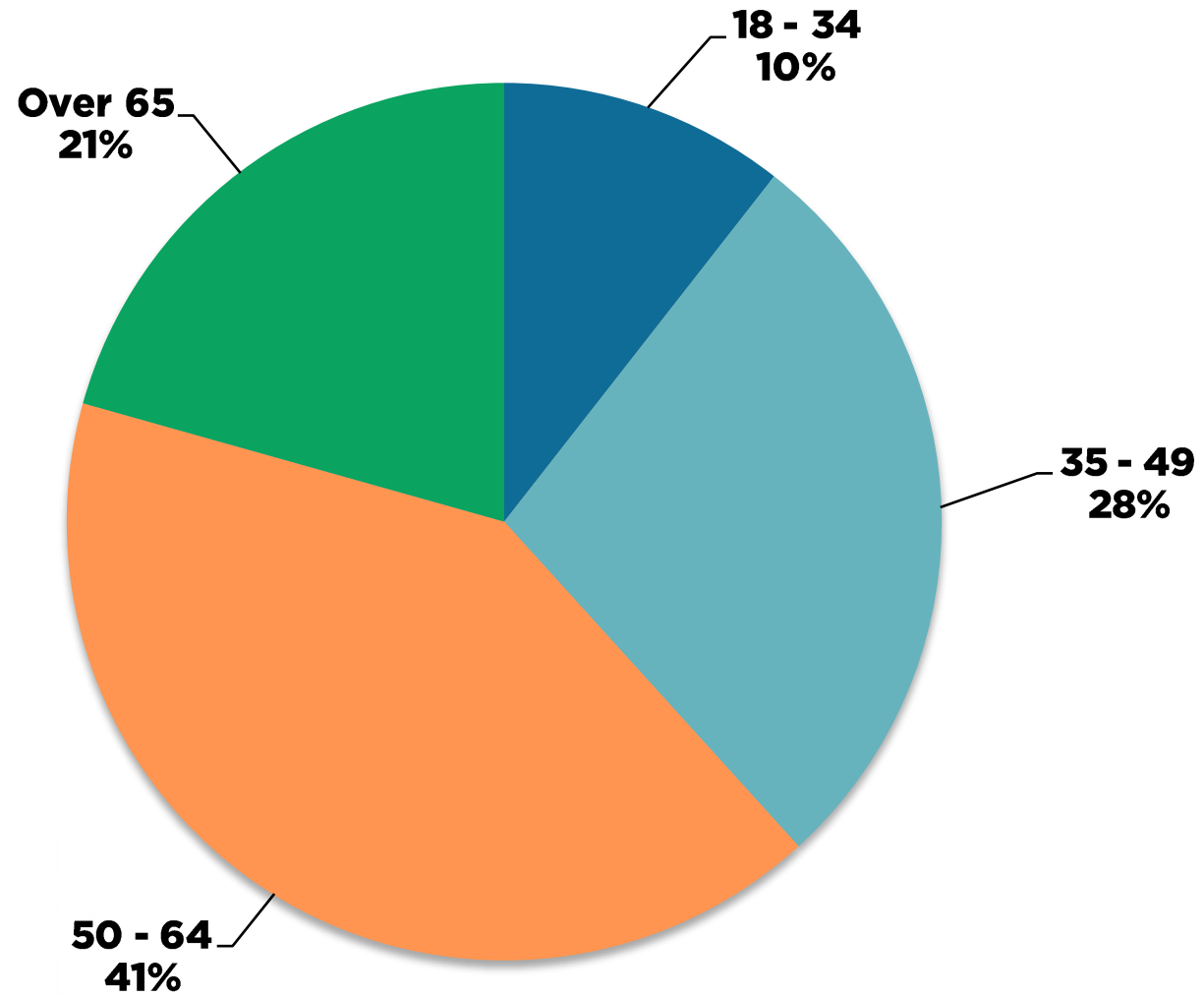
1,033 Responses - by Region



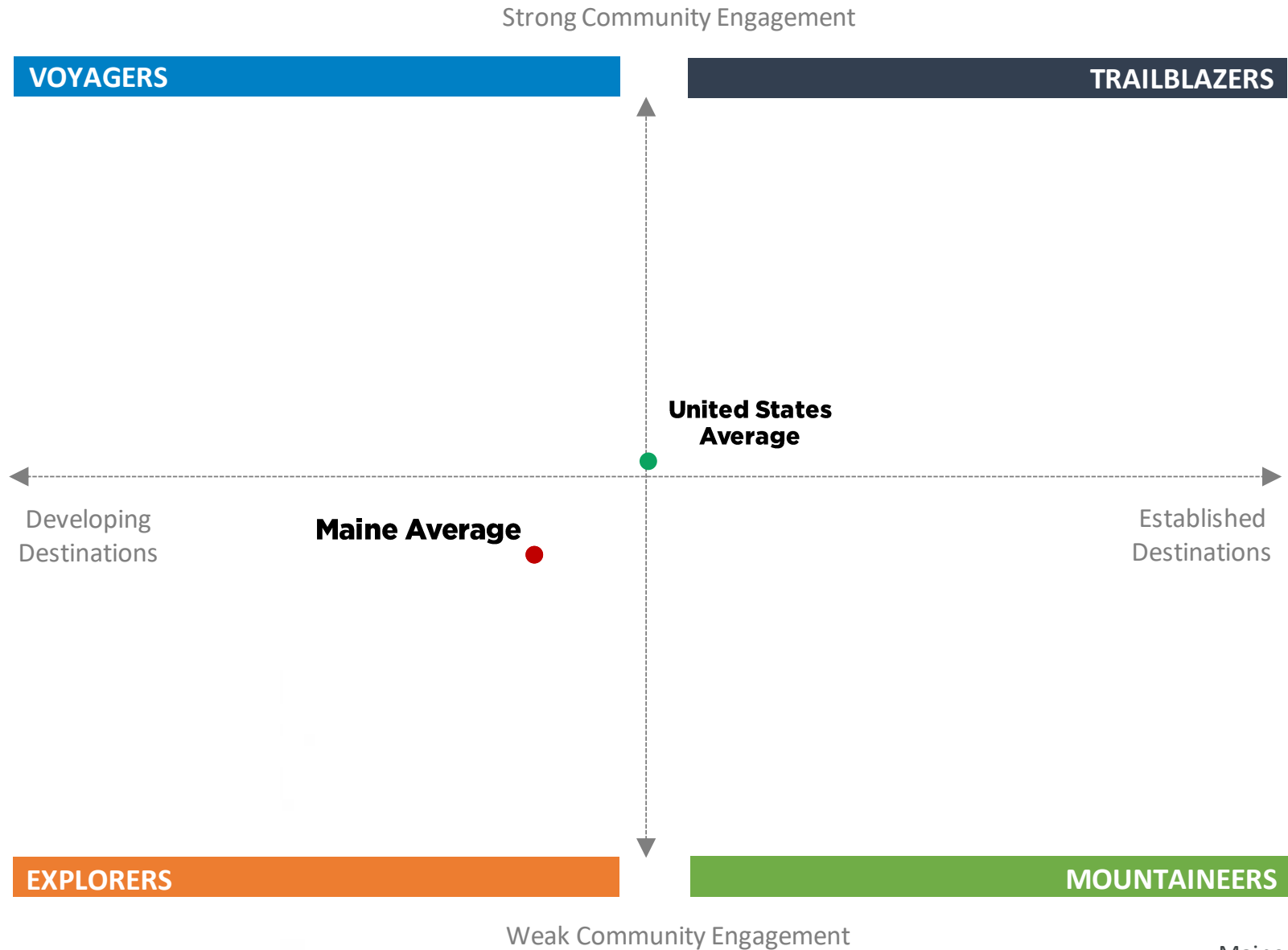
1,033 Responses – By Stakeholder



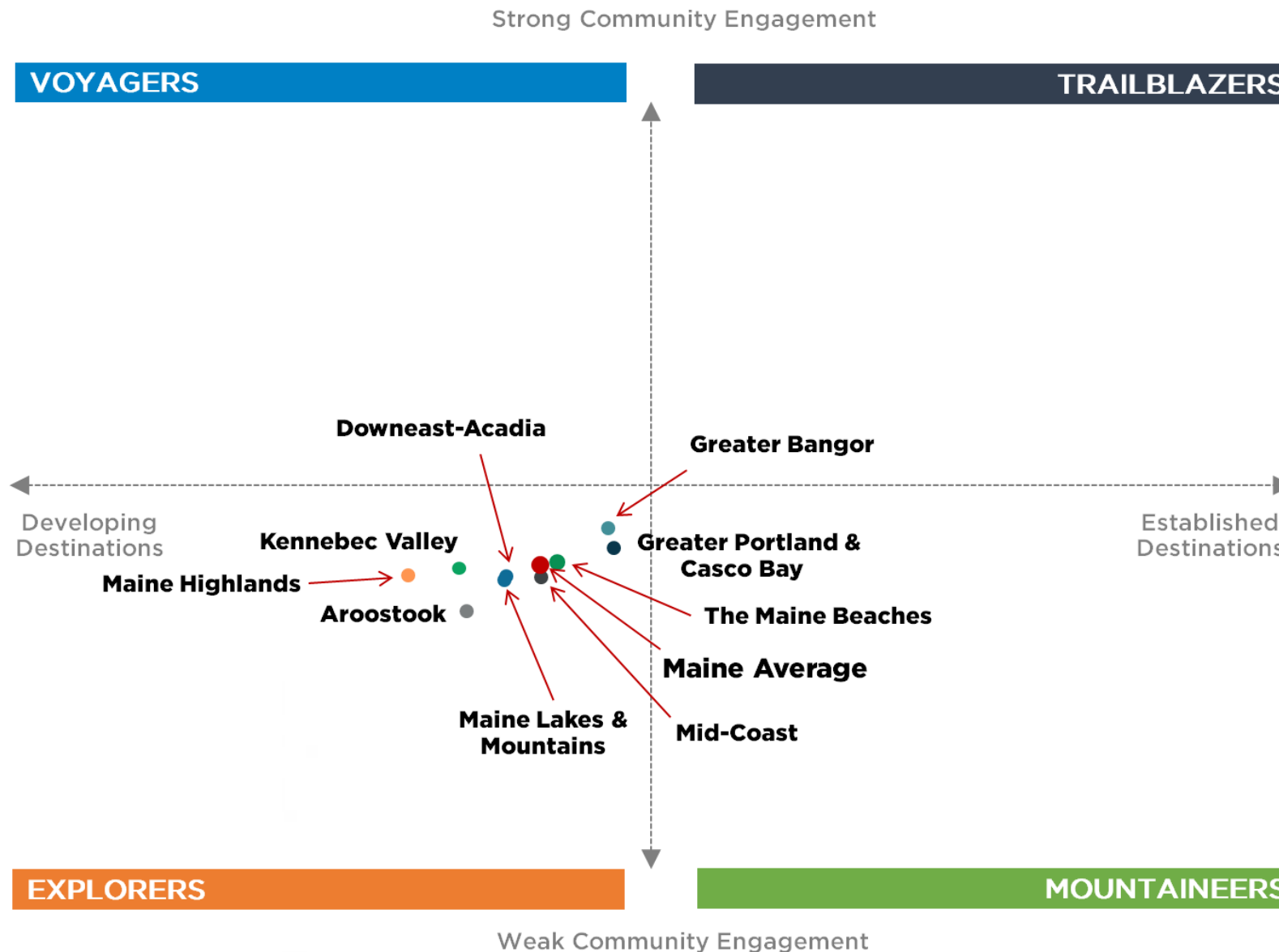
Age Demographic



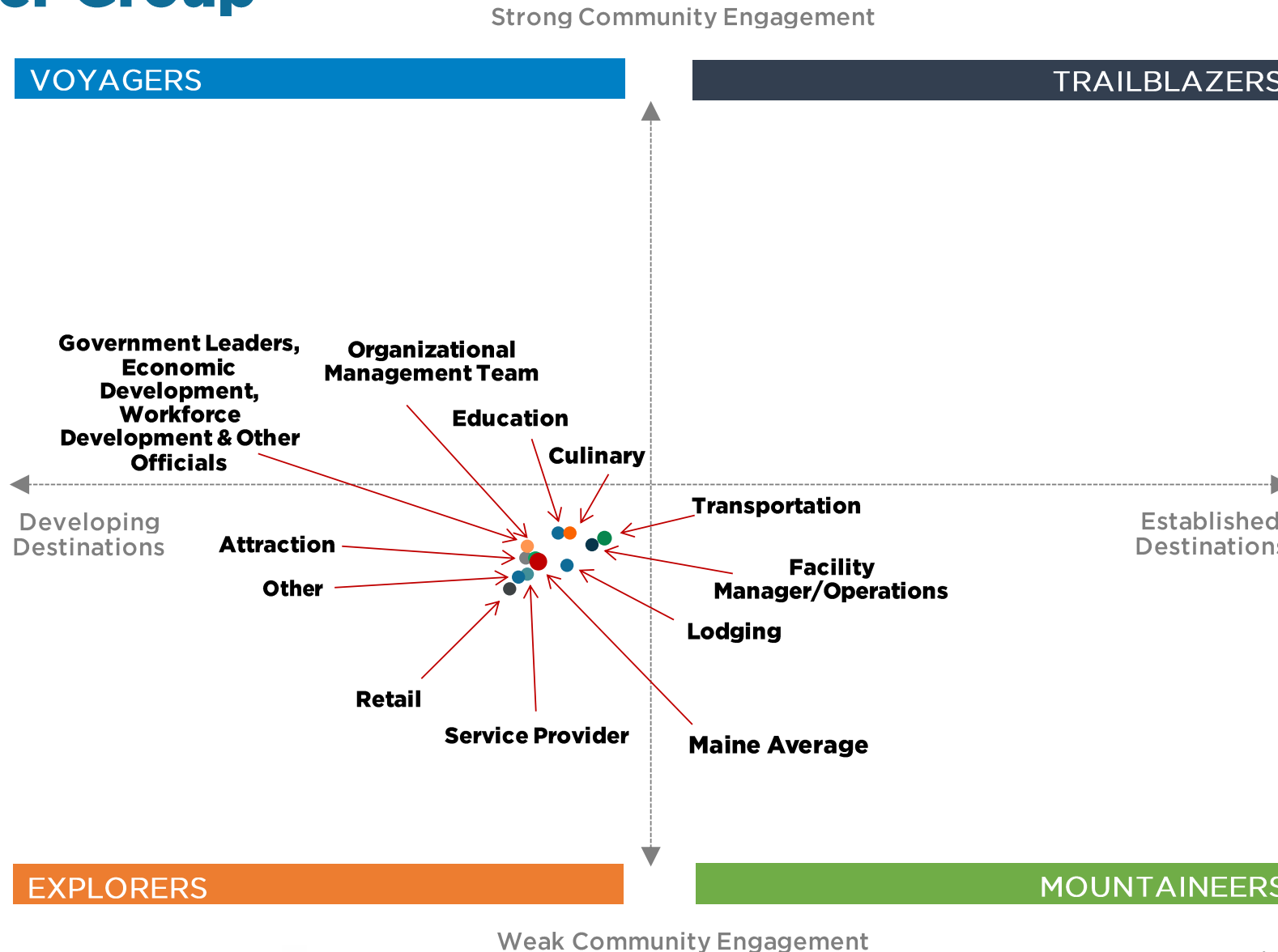
State of Maine Overall Assessment - Industry



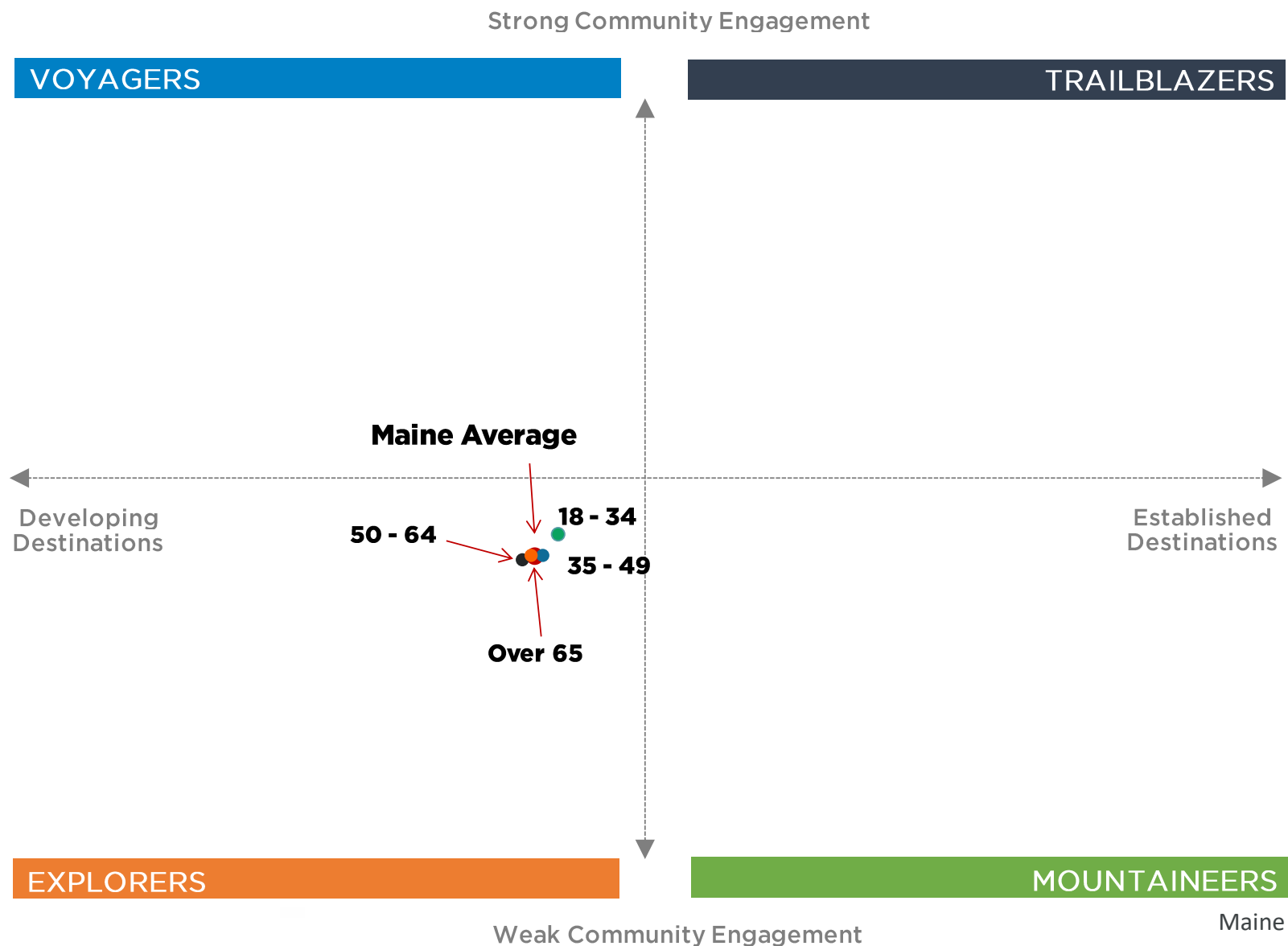
State of Maine Overall Assessment – Regions



State of Maine Overall Assessment – Stakeholder Group



State of Maine Overall Assessment – Age



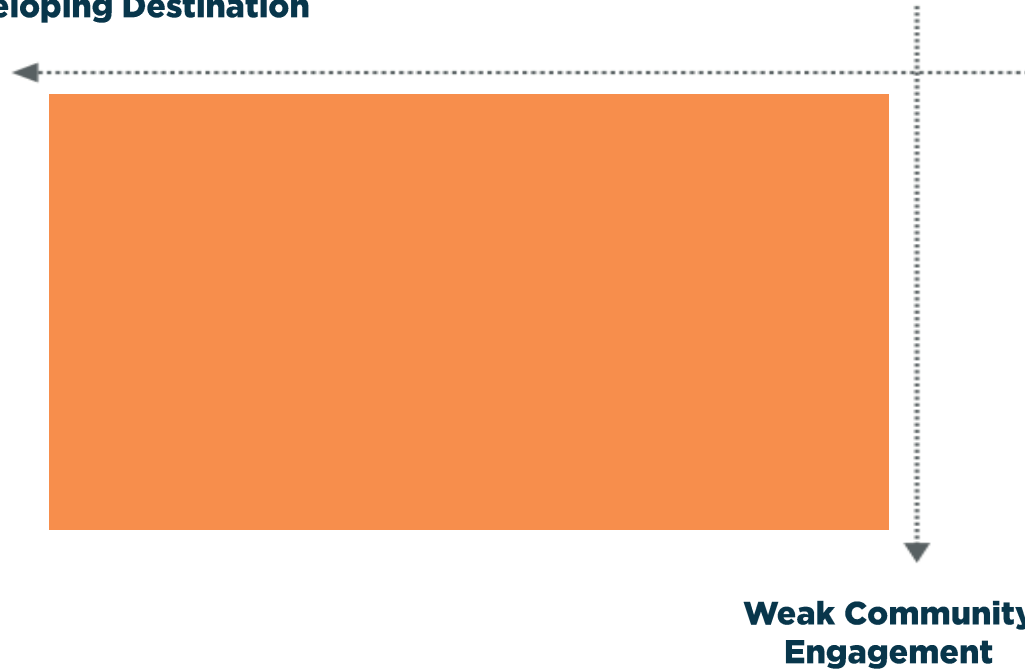
Explorers

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

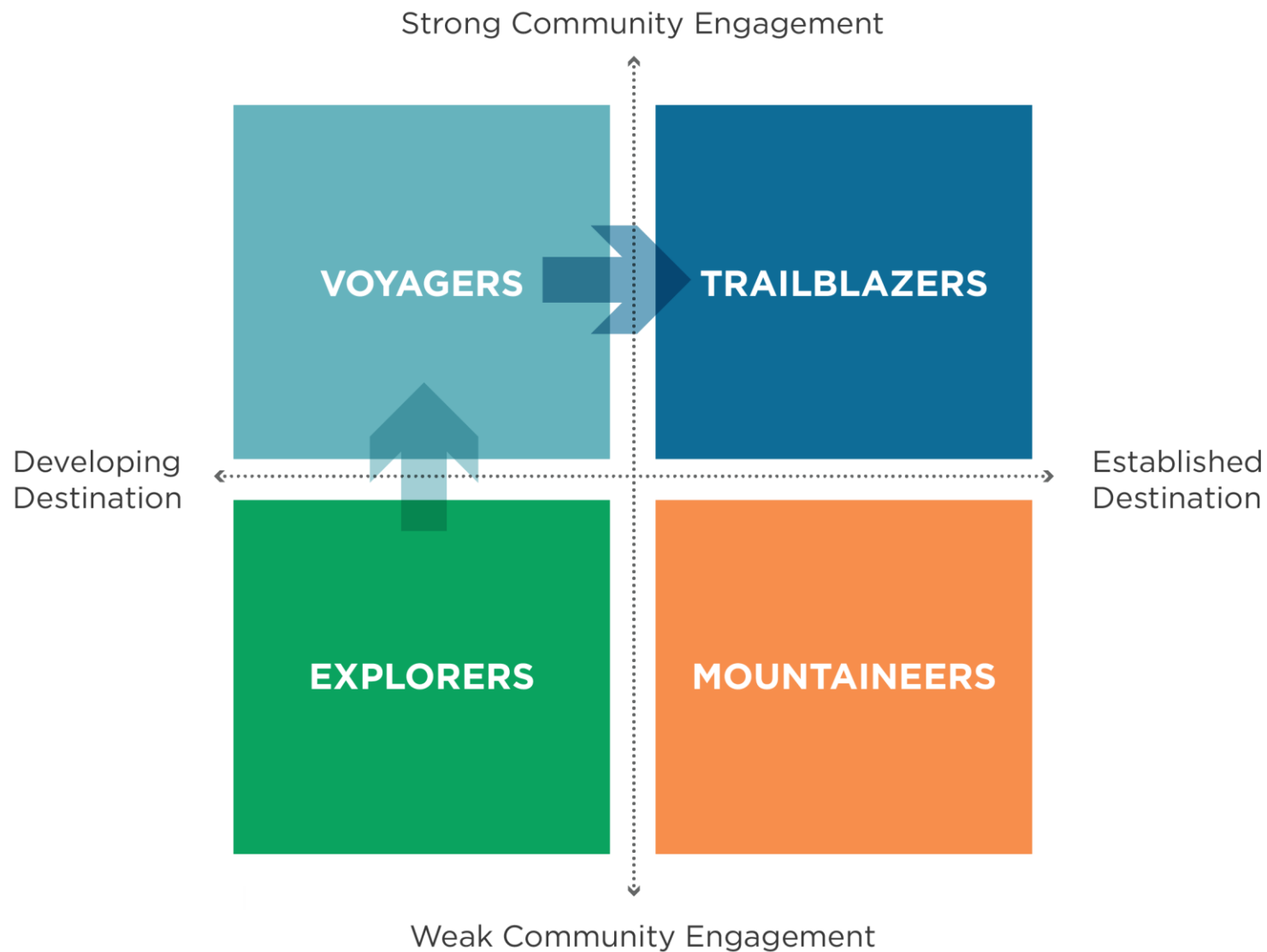
Key Strategic Challenges

- **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
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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

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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

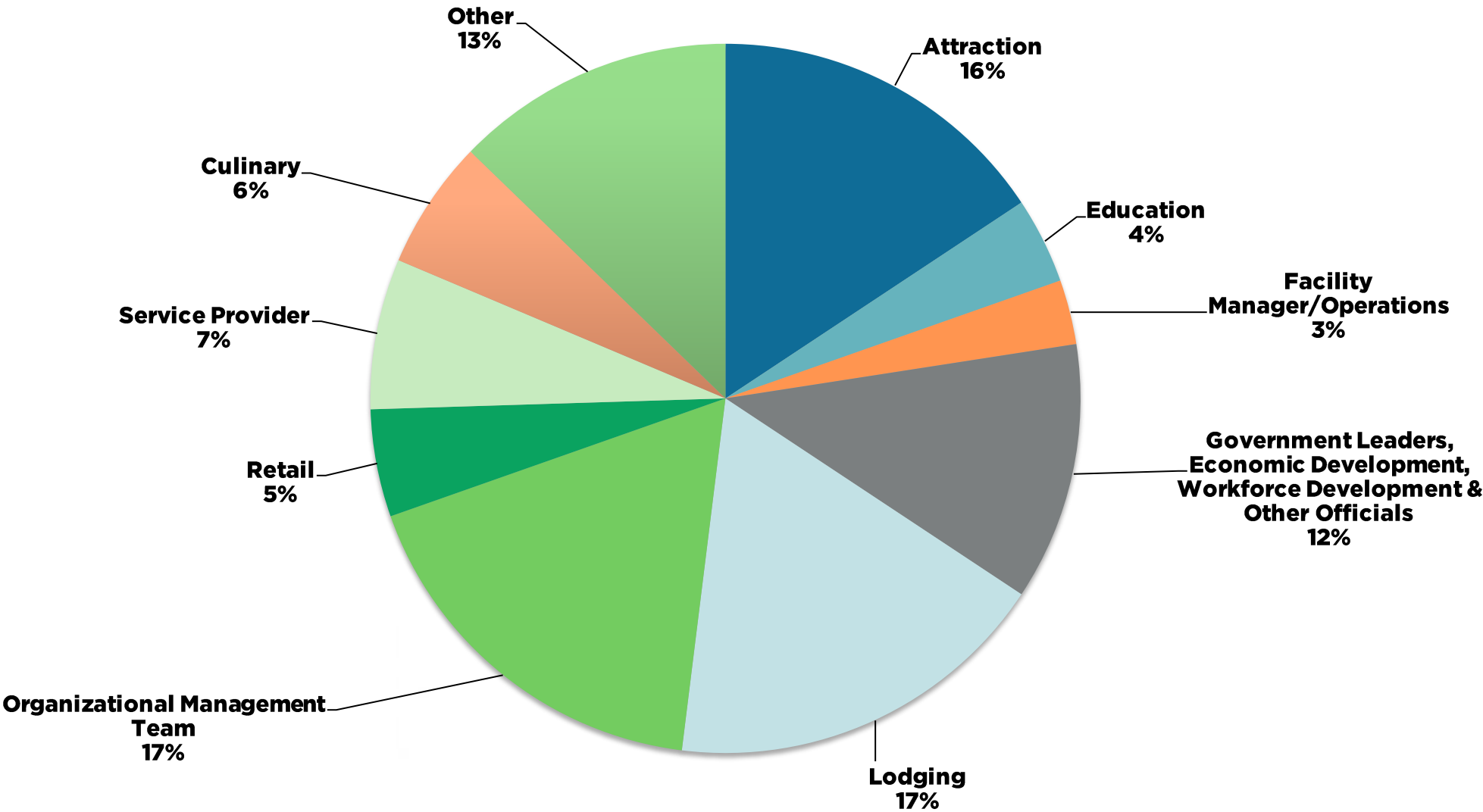
Multi-User Online Diagnostic
Tool Results:

State of Maine Assessment -
Maine Lakes & Mountains

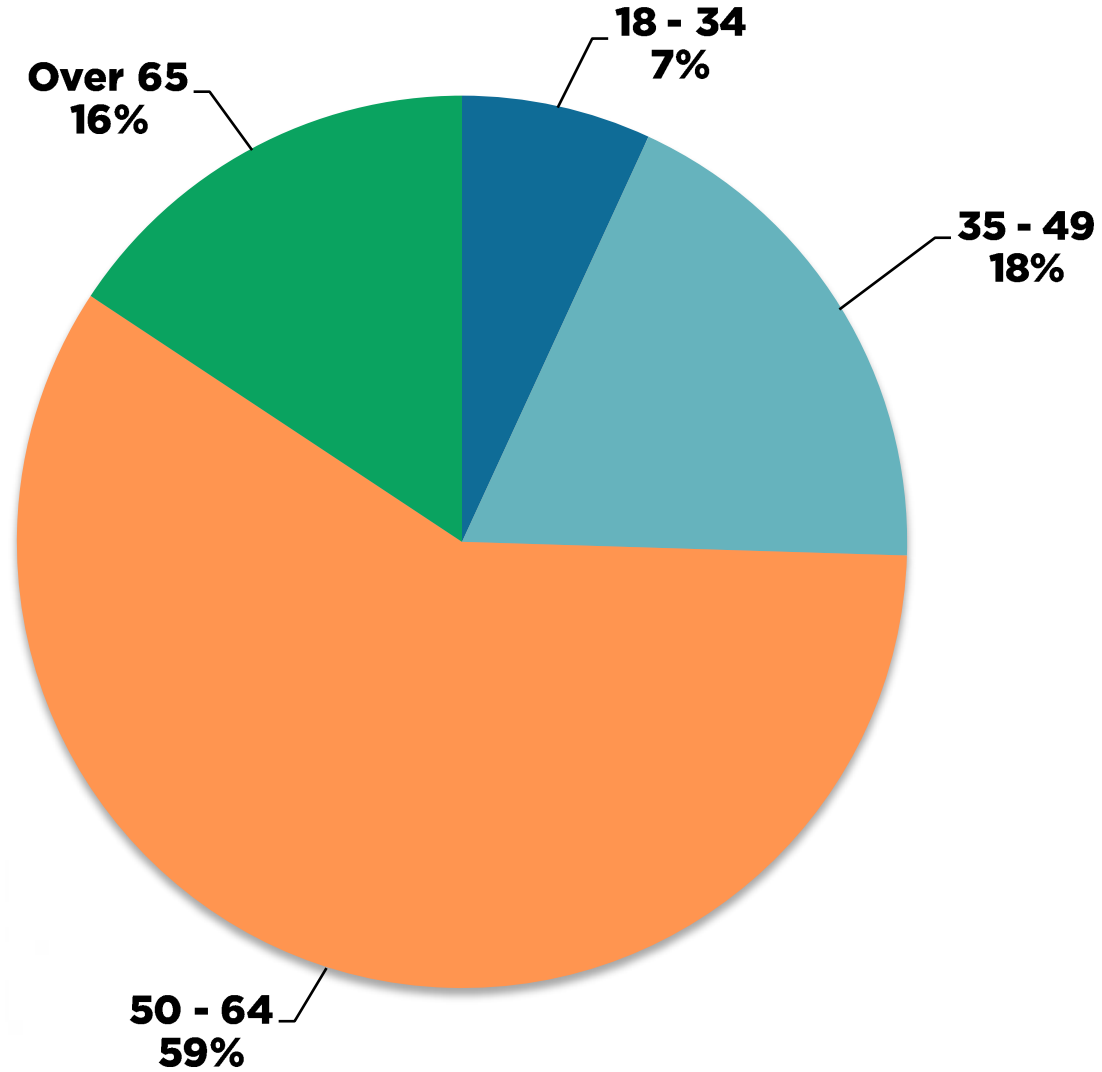
June 7, 2018



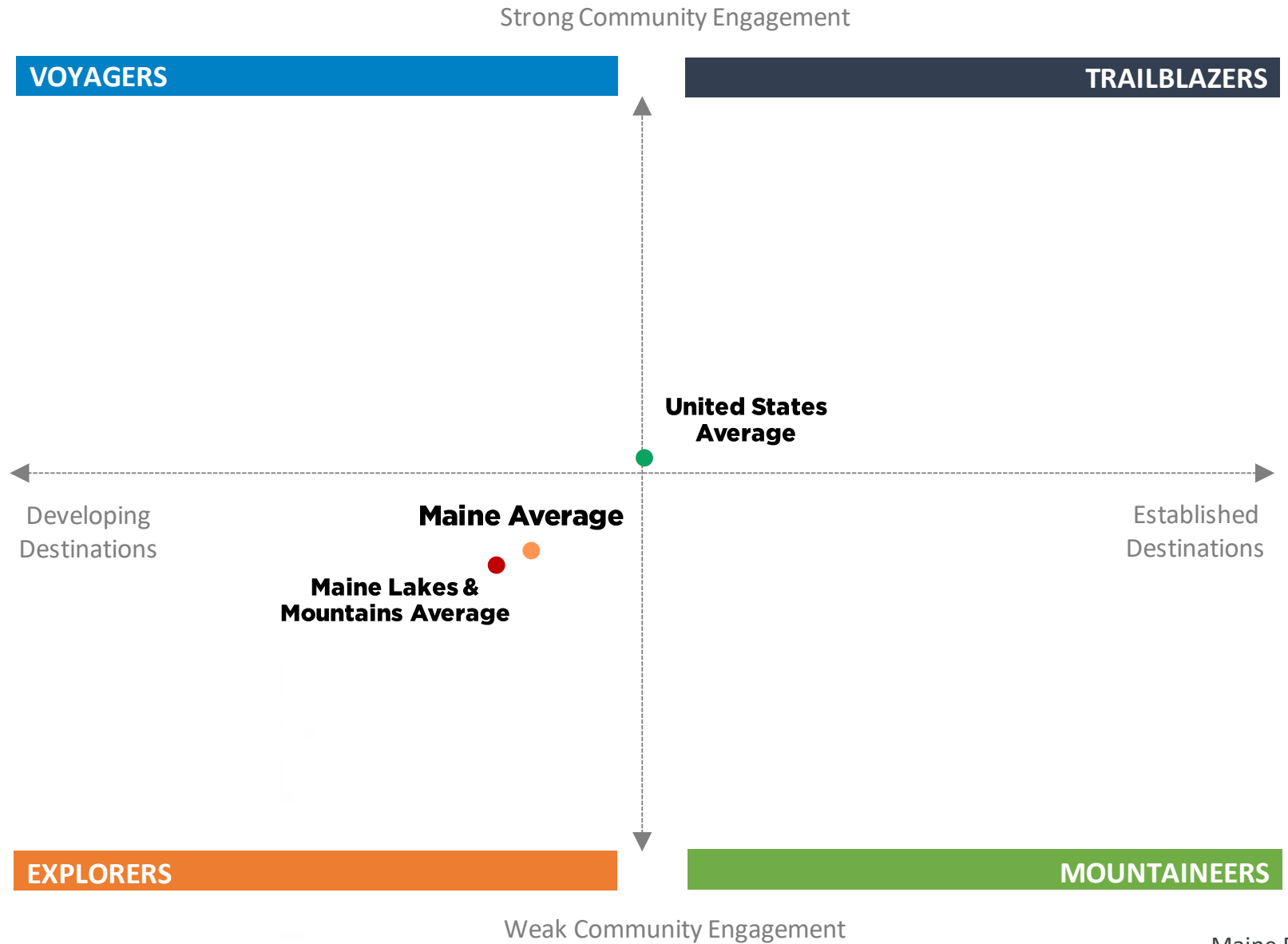
102 Responses



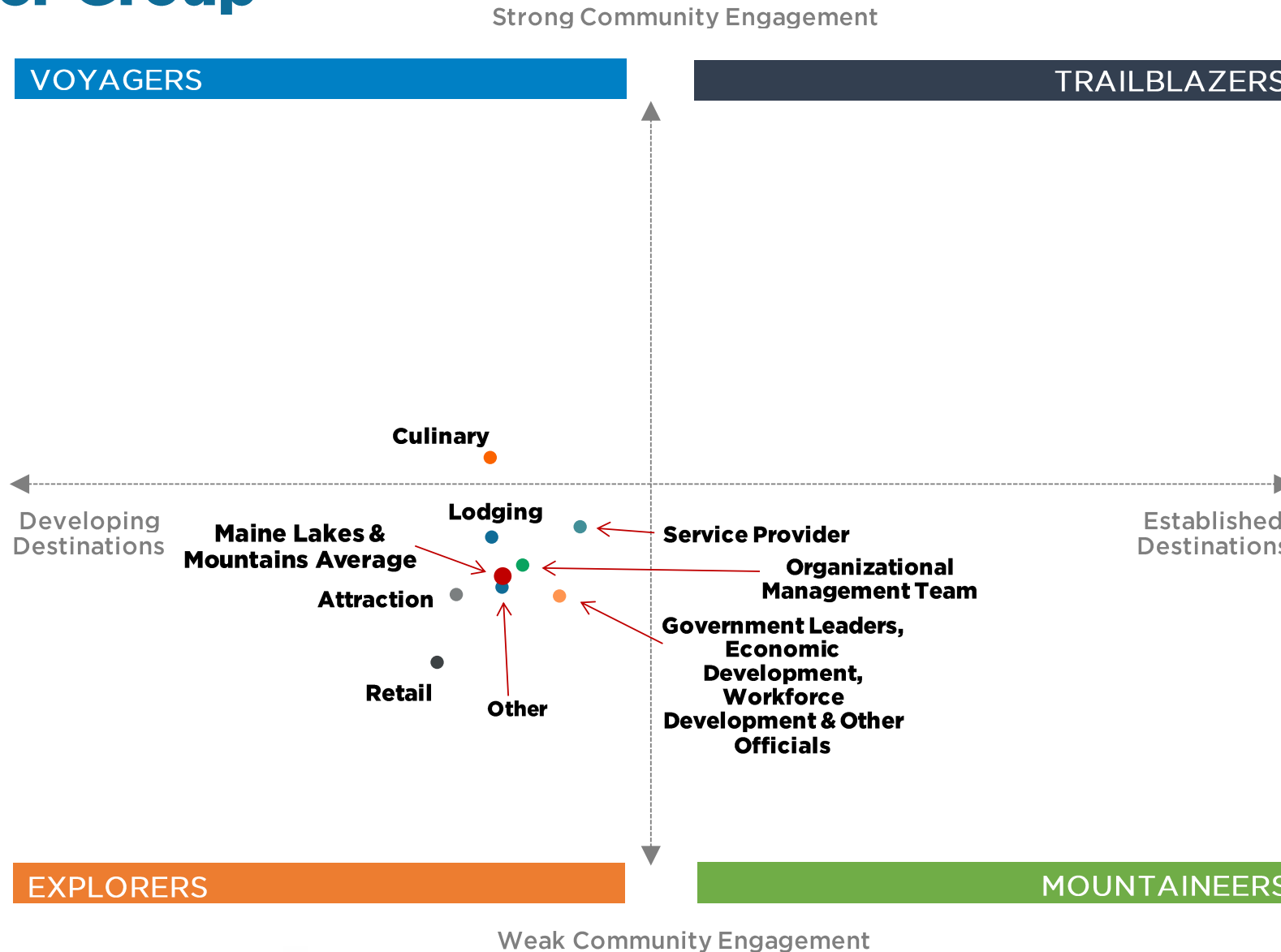
Age Demographic



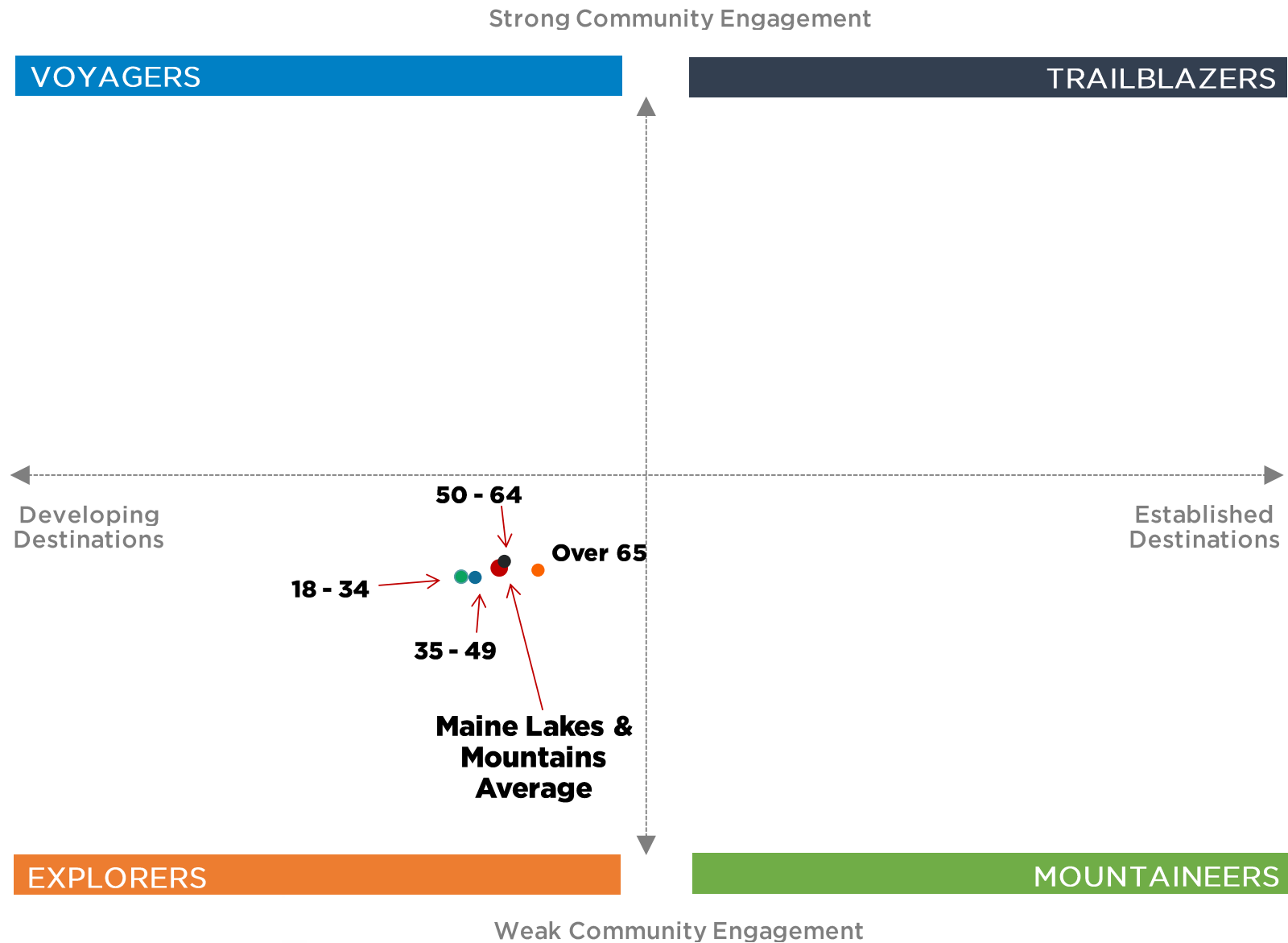
Maine Lakes & Mountains Overall Assessment - Industry



Maine Lakes & Mountains Overall Assessment - Stakeholder Group







Maine Lakes & Mountains Overall Assessment - Age



Destination Strength Rankings – Maine Lakes & Mountains



		Relative Importance	Perceived Performance
	Convention & Meeting Facilities	1 st	10 th
	Accommodation	2 nd	6 th
	Attractions & Entertainment	3 rd	3 rd
	Mobility & Access	4 th	9 th

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Lakes & Mountains Average	Standard Deviation	Industry Average	Maine Lakes & Mountains Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.4%	2%	3.11	2.53	0.68
Accommodation	10.5%	11.2%	2%	3.54	2.96	0.72
Attractions & Entertainment	10.8%	10.9%	2%	3.65	3.18	0.64
Mobility & Access	10.1%	10.7%	3%	3.12	2.67	0.64
Destination Performance	10.0%	10.5%	2%	3.88	2.97	0.52
Sports & Recreation Facilities	9.4%	10.4%	2%	3.29	3.29	0.61
Brand	10.5%	10.1%	2%	3.49	3.35	0.63
Communication & Internet Infrastructure	10.1%	9.3%	2%	3.39	2.75	0.80
Air Access	9.2%	7.8%	2%	3.16	2.93	0.51
Events	9.7%	7.7%	3%	3.63	3.11	0.63

DESTINATION STRENGTH - Maine Lakes & Mountains

2.97

INDUSTRY AVERAGE DESTINATION STRENGTH

3.49

RESULTING SCENARIO

EXPLORERS

Note

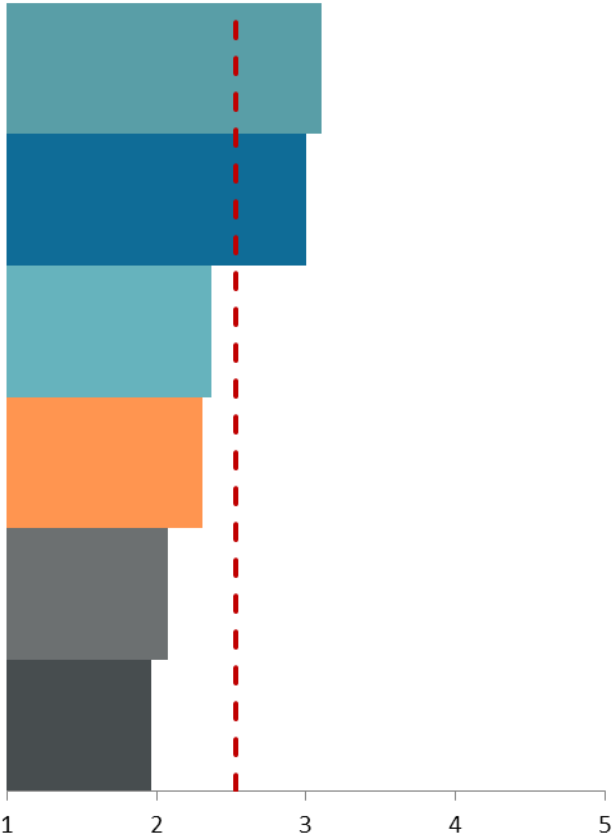
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Convention & Meeting Facilities

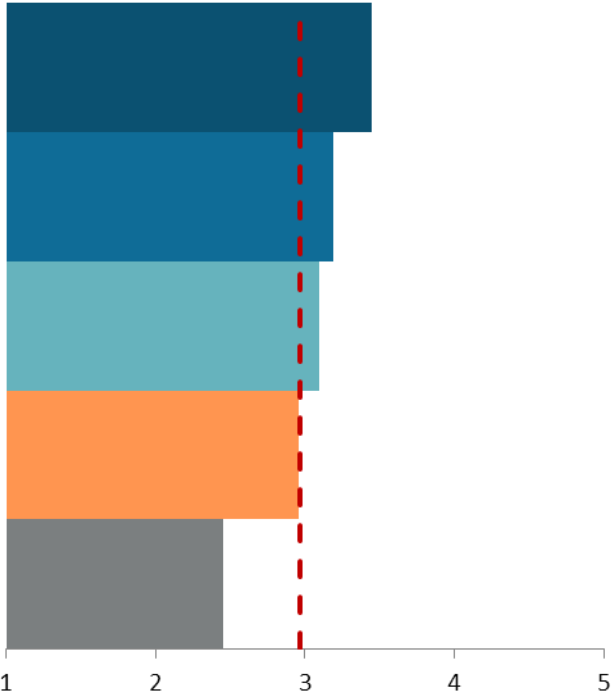
- Where possible, hotels/other meeting venues take full advantage of the views
- Has good, unique off-site venues for special events
- Has the necessary convention, meeting, and trade show facilities to compete today
- Offers an abundance of professional and experienced convention and/or meeting services 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.

Accommodation

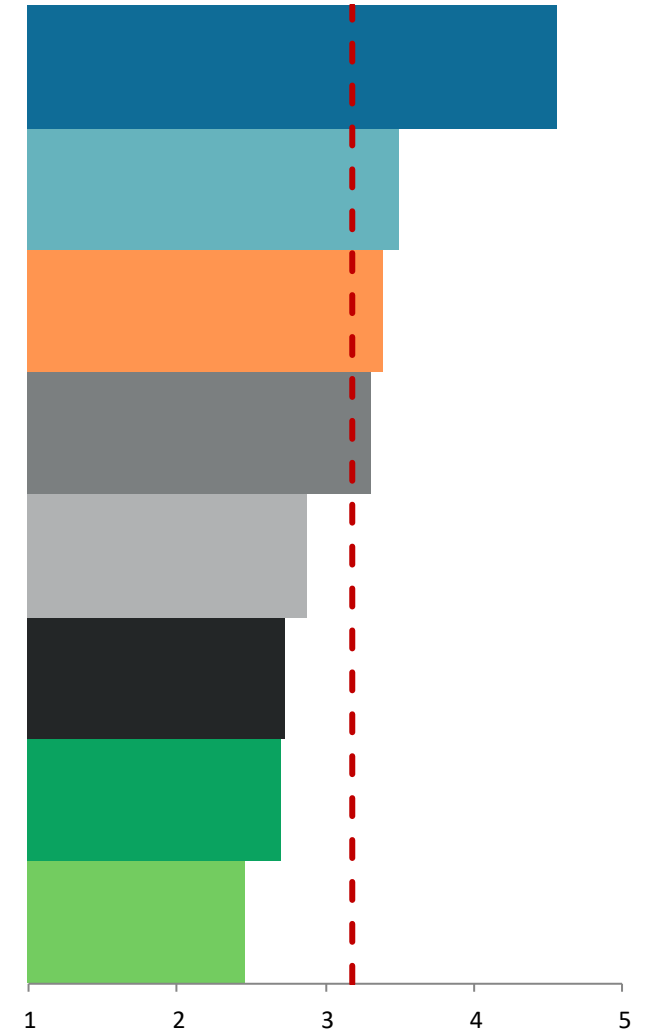
- Offers a diversity of accommodation price options
- Has adequate hotel accommodations capacity
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Has a healthy presence of well-known brand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



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

Attractions & Entertainment

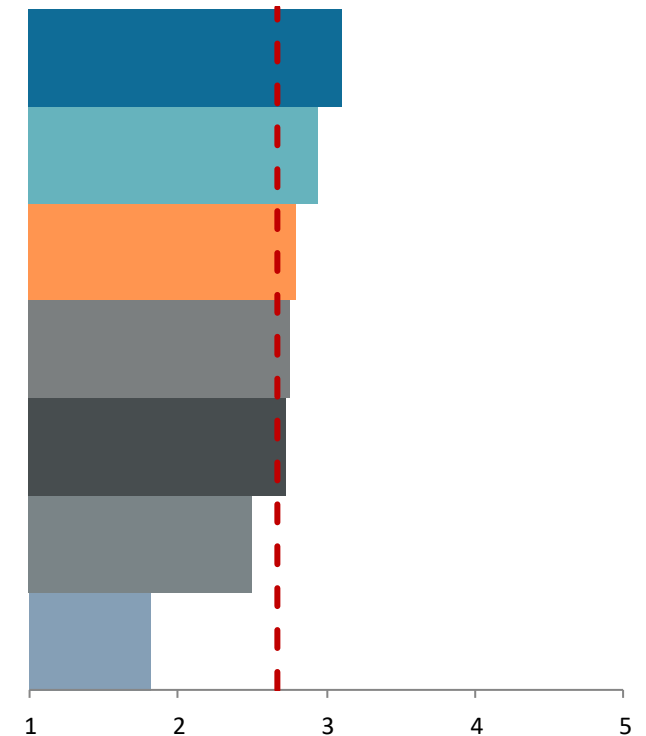
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)
- Has unique and high-quality dining options
- Has high-quality and wide-ranging arts and cultural attractions
- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors
- 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.

Mobility & Access

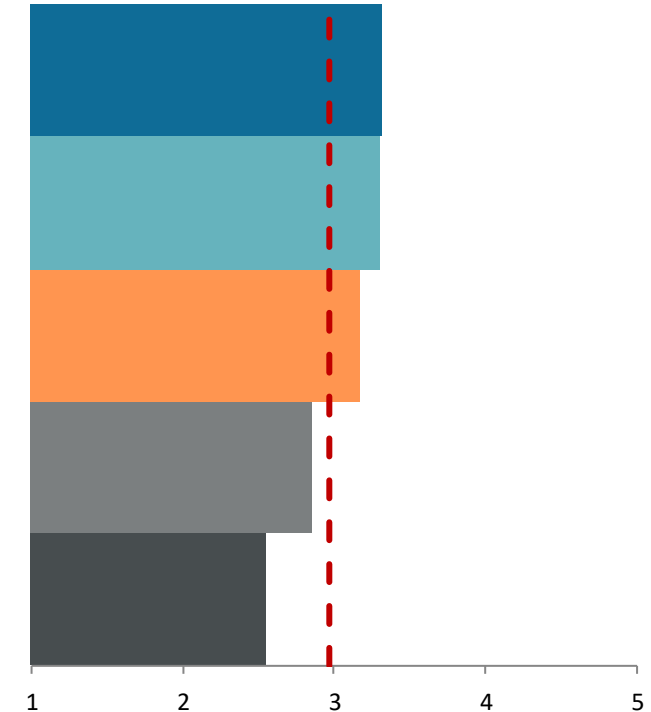
- Roads can easily handle residents, businesses and visitor traffic throughout the year
- Has great directional signage and highways that make it easy to get around
- There are a number of sufficient and visible information centers available to tourists
- Has adequate water access that makes it easy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

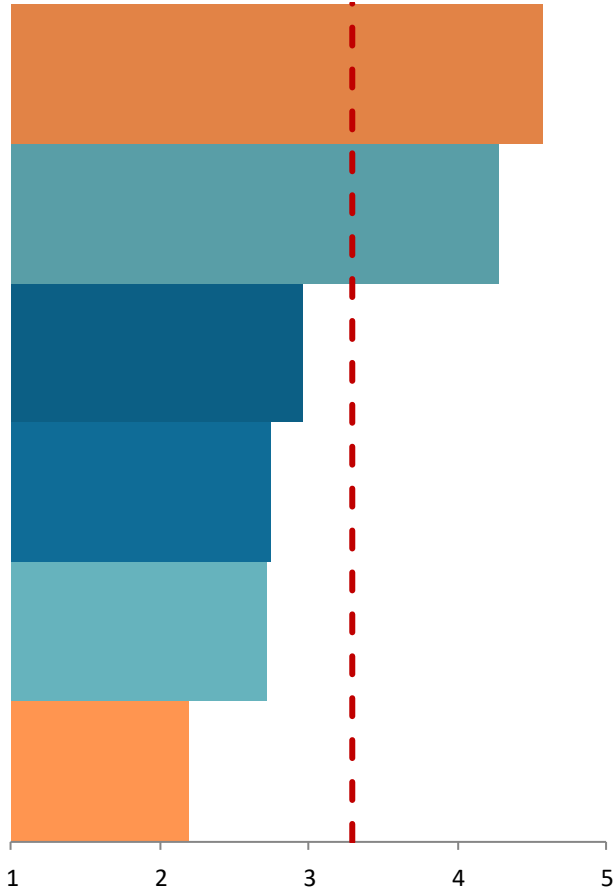
- Is experiencing a positive growth in overnight visitation
- Tourism industry performance is adequately measured and tracked
- Hotels are performing well (e.g. Occupancy, RevPAR)
- The tourism industry does a good job at communicating the performance and economic impact to the public
- Is successfully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



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

Sports & Recreation Facilities

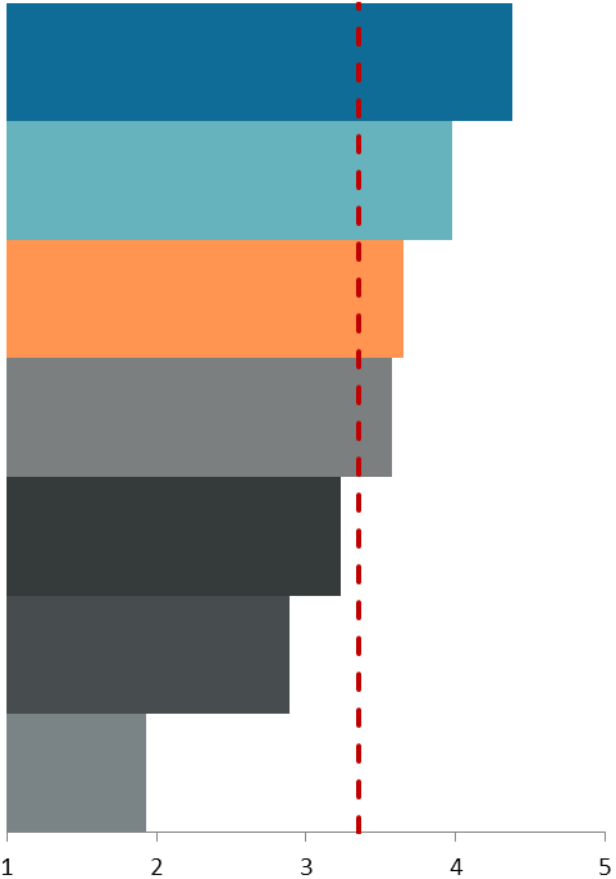
- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- The Maine Sports Commission is a useful resource and is properly utilized throughout the region
- Leadership representing sports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



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

Brand

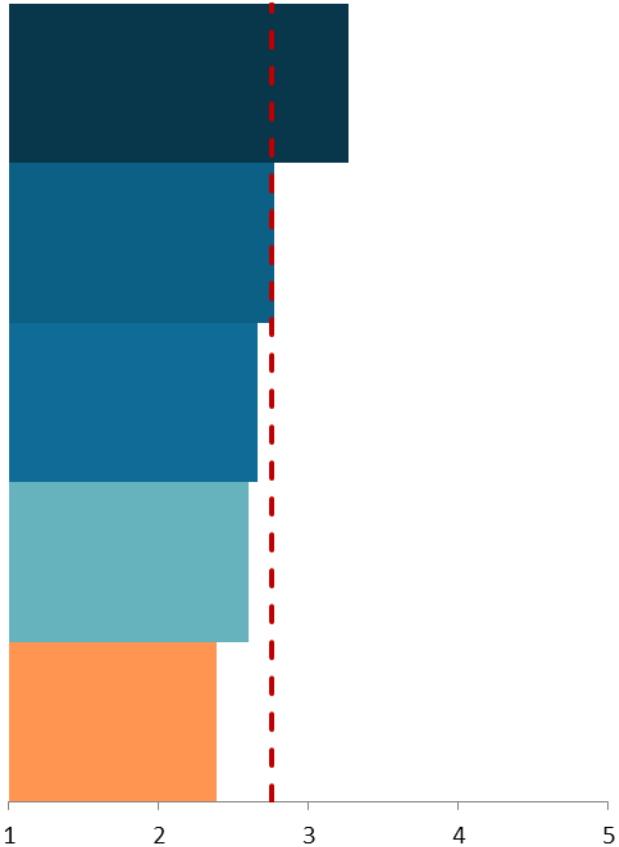
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for being environmentally conscious and sustainable
- Is known for having a lot of things to see and do
- Appeals to a diverse range of visitors
- Has an effective region-wide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



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

Communication & Internet Infrastructure

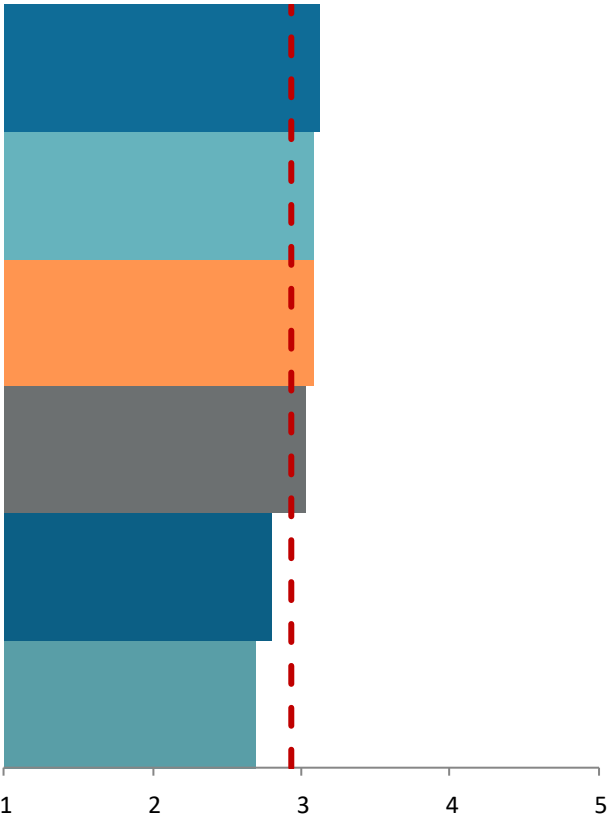
- Tourism industry uses and leverages social media to support the brand and market
- There is substantial Wi-Fi access in region’s meeting/convention facilities
- Businesses have access to good broadband capacity to be able to run their businesses effectively
- There is reliable mobile phone service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



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

Air Access

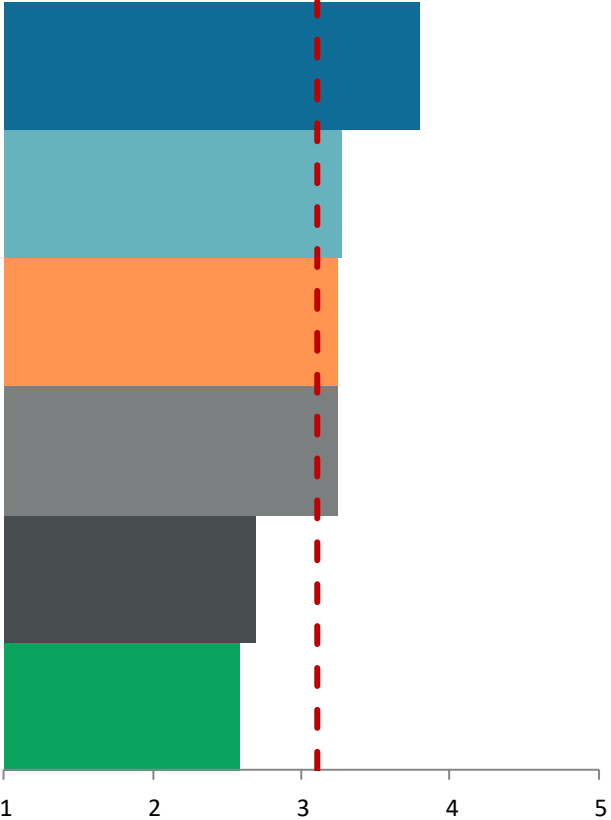
- Has adequate domestic air access through airports (number of flights/capacity)
- Local airport offers a "sense of place" that supports the brand and promotes the region and state
- Local airport has the facilities to grow tourism in the region
- Has adequate domestic air access through airports (#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



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

Events

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



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

Community Support & Engagement – Maine Lakes & Mountains



Relative Importance

Perceived Performance



Local Community Support

1st

3rd

Industry Support

2nd

2nd

Regional Cooperation

3rd

8th

Effective Advocacy Program

4th

6th

Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Lakes & Mountains Average	Standard Deviation	Industry Average	Maine Lakes & Mountains Average	Standard Deviation
Local Community Support	10.2%	10.6%	2%	3.56	3.34	0.87
Industry Support	9.9%	10.5%	2%	3.81	3.50	0.86
Regional Cooperation	10.0%	10.5%	2%	3.76	3.16	0.80
Effective Advocacy Program	10.2%	10.3%	2%	3.63	3.21	0.78
Hospitality Culture	10.2%	10.3%	1%	3.71	3.22	0.88
Economic Development	10.2%	10.0%	2%	3.95	3.89	0.64
Membership Strength & Support	9.6%	9.9%	2%	3.76	3.30	0.77
Workforce	10.1%	9.8%	2%	3.31	2.44	0.65
Funding Support & Certainty	9.9%	9.3%	2%	3.36	2.36	0.74
Effective DMO Governance Model	9.6%	8.8%	2%	3.80	3.18	0.84
COMMUNITY SUPPORT & ENGAGEMENT - Maine Lakes & Mountains						3.17
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT						3.60

RESULTING SCENARIO

EXPLORERS

Note

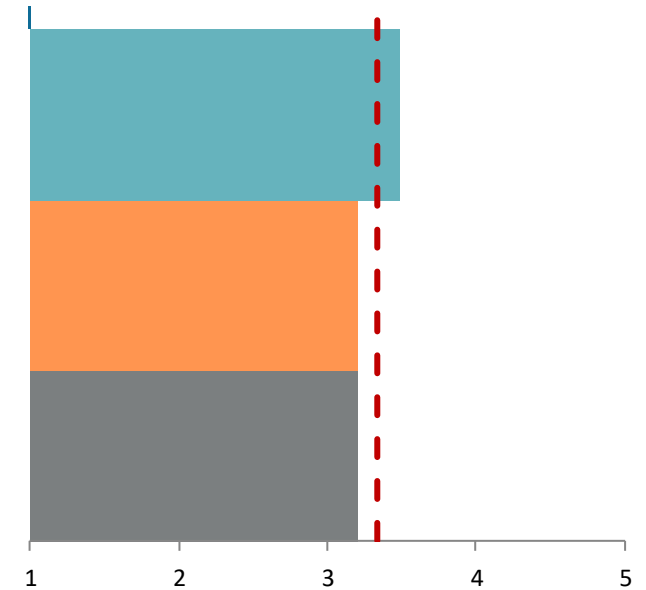
Green shading signifies that the destination outperformed the industry average by greater than 0.2.

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.

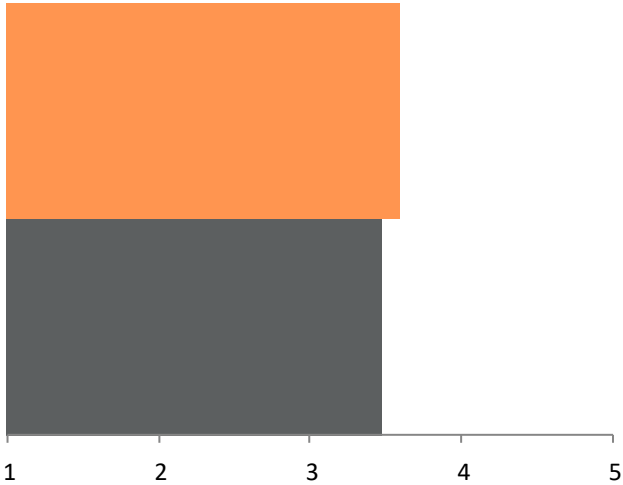
Local Community Support

- 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



Industry Support

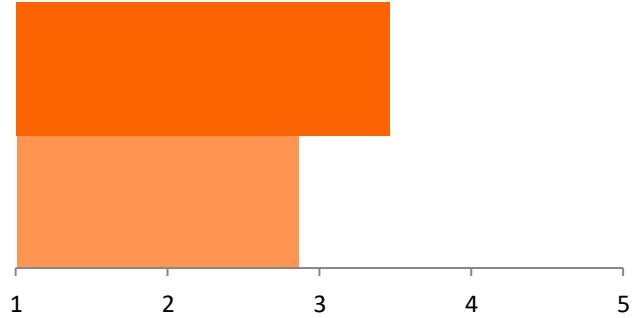
- Tourism industry leaders and stakeholders are supportive of the regional tourism industry
- Tourism industry leaders and stakeholders are investing in activities



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

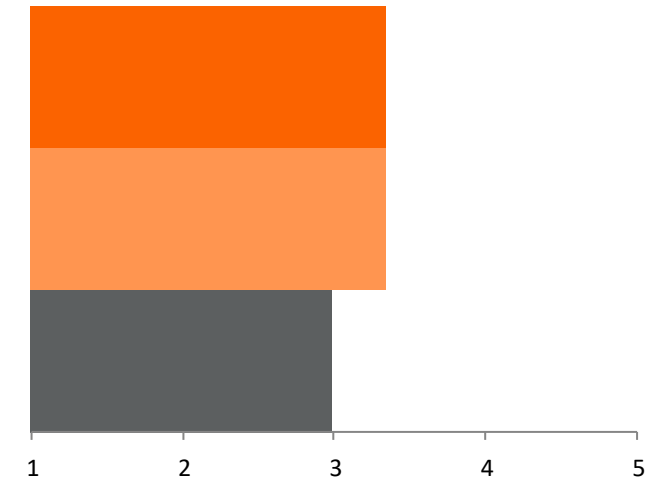
Regional Cooperation

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



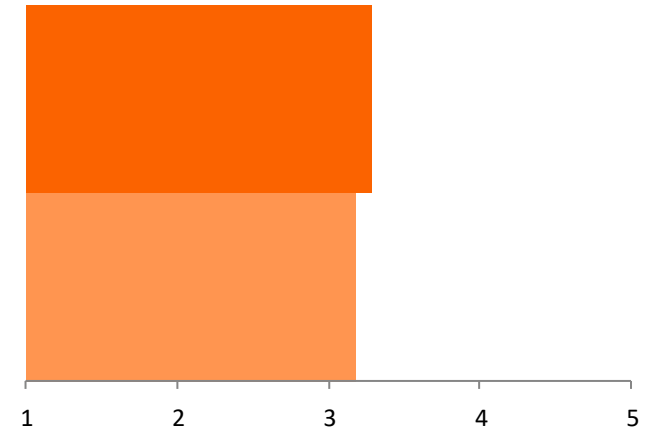
Effective Advocacy Program

- 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



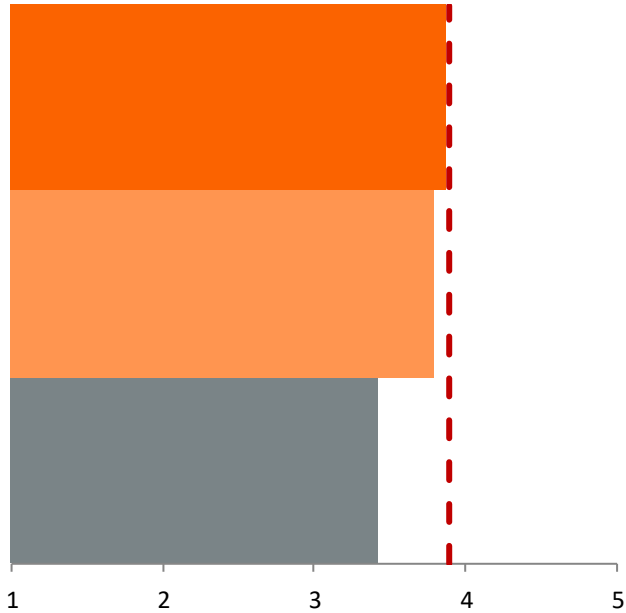
Hospitality Culture

- 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

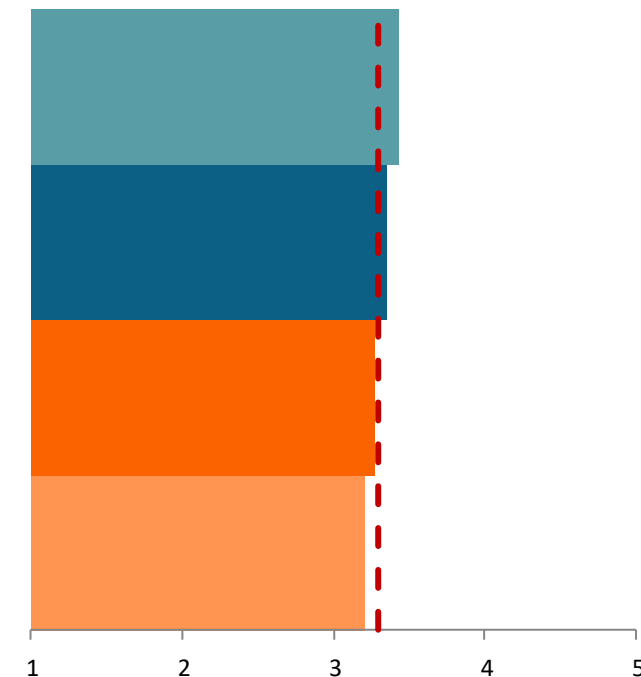
- Tourism is identified as a key economic driver for the region
- Tourism industry has a good working relationship with local chambers and/or economic development agencies
- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business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



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

Stakeholder Strength & Support

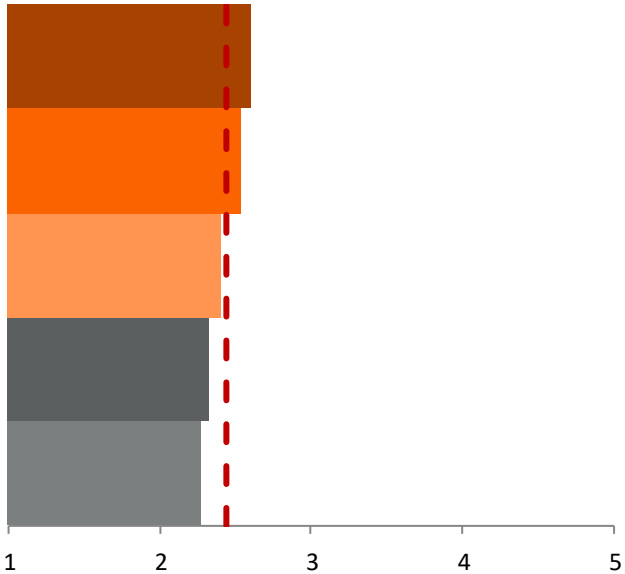
- Stakeholders are active, engaged and supportive of tourism marketing
- Stakeholders are active, engaged and supportive of tourism development
- Stakeholders find value in region-wide partnerships
- Stakeholders find value in partnerships that include other tourism regions



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

Workforce

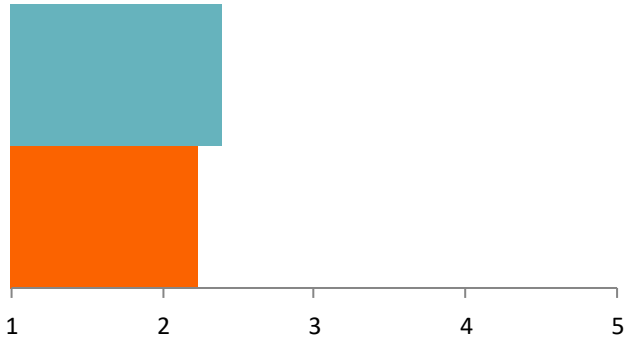
- The H2B visa restrictions have not affected businesses that cater to tourists or the hospitality industry workforce
- The region’s workforce is stable and has a positive labor relations environment
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The increase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



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

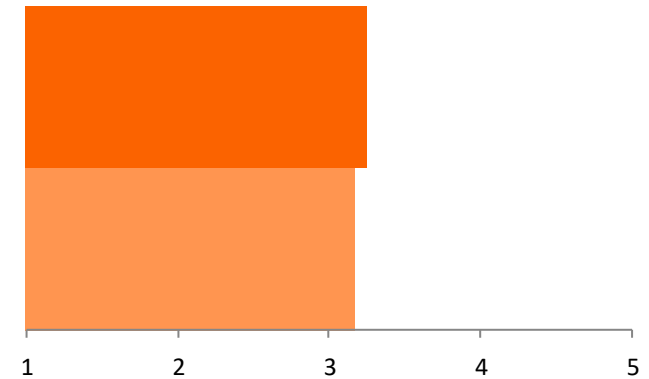
Funding Support & Certainty

- 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

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



Destination Opportunities

- **Iconic attractions**
- **Unique neighborhoods**
- **Meeting facilities**
- **Hotel capacity**
- **Shopping**
- **Public transportation**
- **Sporting event venues and fields**
- **Wi-Fi & cell service**
- **Regional marketing**
- **Public/lifestyle shows at local venues**



Community Support & Engagement Opportunities

- **Regional collaboration**
- **Linking economic development strategies with tourism industry**
- **Workforce**
- **Funding**

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

Advertising, Marketing, PR & Branding (23%)

- A more positive marketing effort that highlights all the assets of the Lewiston-Auburn area
- Brand development
- Encouraging visitors along the coast to come just a few miles inland
- More advertising of smaller destinations with unique natural attractions such as hiking, water sports, scenic drives etc.
- Marketing of tourism opportunities. The region is diverse, but relatively compact. Visitors can enjoy paddling, skiing or boating on the same day as enjoying the cultural amenities and dining options of cities

Transportation Infrastructure (21%)

- Address heavy weekend traffic into the state. Possibly create flexible travel lanes that switch from northbound travel on Friday and Saturday to southbound on Sunday and Monday
- Availability of transportation from population centers to this area, including transportation for those who cannot drive (elderly and those with disabilities)
- Sidewalks along main thoroughfares in order for tourists and general population walk between local businesses, especially along route 302 in Windham
- State routes and secondary roads need improvement on the surface and the signage.
- Better transportation routes to the key destination areas

Visitor Amenities & Experiential Product Development (18%)

- More trails, scenic views, and access to the National Forest, Mahoosuc Land Trust, and Grafton Notch State Park areas/land. Also better sidewalk access in downtown Bethel and West Bethel
- More options for camping and diverse recreation. More programs designed for outdoor recreation
- More upscale dining options, especially in Poland area
- Development of events/activities and communication of those activities to visitors
- Better environment in towns- better upkeep

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

Planning & Experiential Product Development (14%)

- Develop and sell unique experiences
- Developing visitor access and activities on lakes
- Downtown Revitalization
- More educational/experiential programming
- Unique hands-on experiences-nature based
- Themed itineraries
- Sustainable agriculture and forest products
- Product development around strategic partnerships
- Development of mill buildings

Outdoor Recreation & Sports (14%)

- Improved interconnected, multiuse trail system
- Increase access for local residents to golf, ski, bike, hike and coastal destinations - spread the word from the local perspective
- Ski industry - re-open Saddleback
- Outdoor recreation
- Mountain regions underutilized
- Mountain biking
- Exploit the rivers. Walking, hiking, fishing

Branding, Advertising, Marketing (8%)

- Identifying and promoting the highest potential destination areas
- Responsiveness to changing market demands
- Promotion of our extensive outdoor recreation assets
- Find ways to get the population to look towards living in areas outside of Portland. If other areas thrive, they will bring other economic benefits to the areas
- Branding of the area
- Better recognition of Maine High Peaks as a region

What are the top tourism issues to address?

Advertising, Marketing & Promotion (17%)

- Current attractions need to find more ways to expand their markets to the locals. Locals can support a business during off-peak times
- Lack of marketing message for Maine as a winter destination, other than for skiing
- Maine is known as beautiful, but doesn't necessarily have the "sizzle" and "spark" that makes people say - let's go now (they know it's always there/they can go at some point)
- Marketing of recreational offerings both private and public sector
- Understanding ways of using social media to effectively reach tourists

Transportation Infrastructure (16%)

- Access, bad roads, no major airports or public transit
- Better intrastate system - after winter the few roads that lead to the Western part of the state are barely passable
- Transportation - No way to go to Lakes Region beyond a bus that no one knows about
- Lack of public transportation
- Improving information and wayfinding systems in high potential destinations
- Improved informational signage of scenic spots
- Safety issues for pedestrians
- Improved maps, signage, access for trails

Economic Dev. Planning & Experiential Product Development (12%)

- A balance between conservation and development
- Quality of Experience when compared to Advertisement
- Make it easier for visitors to book rooms and experiences
- Overuse of some natural attractions
- Identify and concentrate effort in the most high potential locations
- Drawing coastal visitors inland
- Lack of a regional plan
- Destination Packaging

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

Outdoor Recreation (36%)

- Adventure particularly mountain biking and fishing
- Aging Baby Boomers who want sports activities
- Biking - mountain, road, fat bikes
- Hiking, Trails and Huts initiatives
- Snowmobile/ATV
- Wilderness tourism
- Trails - hiking, biking, skiing, paddling
- Outdoor exercise enthusiasts

Culinary & Micro-Breweries/Agritourism (18%)

- Culinary - get people excited via Instagram, FB
- Culinary-experience the making as well as dining
- Local food/Agri-tourism
- Sustainable seafood supplies (aquatic farms). People come to Maine for lobster & fresh seafood
- Foodie-culinary arts
- Breweries

Nature, Wellness Eco-Tourism (10%)

- A meditation/yoga center
- Lakefront and harbor walks
- Sustainable/Eco-Tourism
- Urban water sports
- Fresh air & clean water -health
- Get away from it all...space and peace
- Eco-tourism, guided hikes and excursions
- Birding
- Healthy benefits of active vacationing

Engagement

Consider that every minute of the day:

- **3.5 million search queries** made on Google (60% on mobile devices)
- **4.1 million videos** viewed on YouTube (consumers prefer video 4:1 over print to learn about product)
- **46,200 images posted** on Instagram (48% of users use platform to help choose vacation destinations)





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!

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