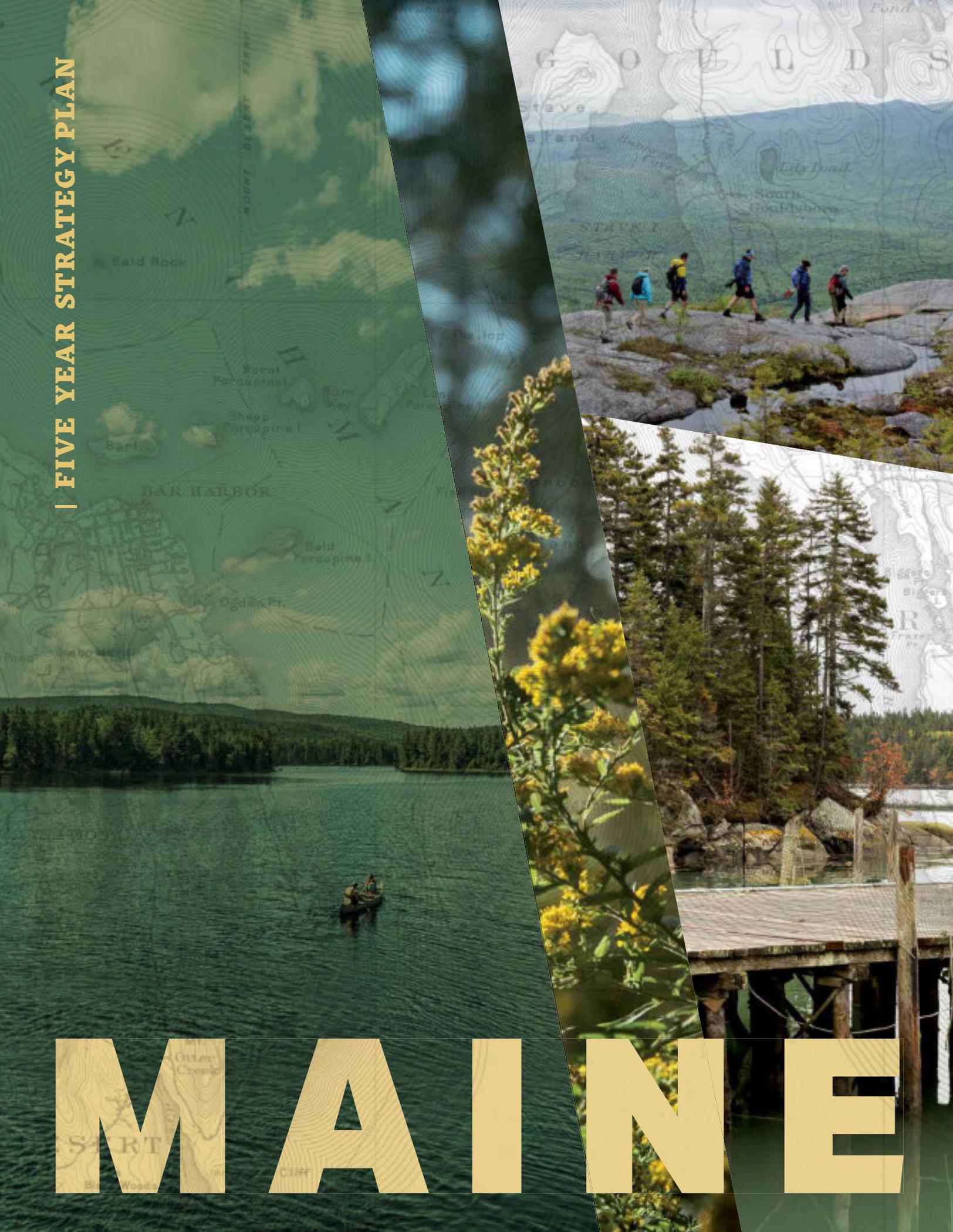


FIVE YEAR STRATEGY PLAN



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## INTRODUCTION & PURPOSE

The purpose of this strategic plan is to create a bold vision for the overall health and economic vitality of the tourism industry within the state of Maine through 2023. As an office within the Maine Department of Economic and Community Development (DECD), the Maine Office of Tourism and Film (MOT) is charged with administering a program to support and expand the tourism industry and promote the state as a tourism destination. As required by legislation, this plan was developed with direct input and collaboration from the tourism industry with the express intent of increasing tourism-based revenues. The plan sets in motion a unified statewide action plan while addressing the challenges unique to each region. It creates a path to follow for delivering value to both visitors and residents alike. This plan intends to unite the tourism industry around clear action steps that determine the future economic and social vitality of the tourism industry.

### THE OBJECTIVES IN THIS PLAN INCLUDE:

- + Provide an overview of the industry's obstacles and establish a shared incentive to act.
- + Capitalize on Maine's inherent equities and strengths, including its abundant natural assets and distinct quality of place.
- + Present solutions that are achievable and can be realistically implemented collectively as an industry.
- + Acknowledge and leverage tourism's role in the overall economic development priorities of the state.
- + Introduce a framework that enables industry members to identify places where they can have the most impact.
- + Assign metrics to measure progress and results.

The intention is to periodically evaluate and modify the plan as needed to adjust for changes in the environment of the travel industry at the state, regional, national and global levels. The industry is encouraged to stay engaged throughout the life of the plan and commit to seeing that the recommendations outlined are properly resourced from both the private and public sectors.

*Five-Year Strategic Plan was adopted from the Cultural Heritage Tourism Principles developed by the National Trust for Historic Preservation.*



Tourism is a vital economic driver for the state of Maine and has a broad impact on many other industry sectors. In 2018, tourism generated **\$6.2 BILLION** in direct expenditures and supported more than **109,000 JOBS**. Maine's tourism-related visitation has grown over the past five years from 32.9 million visitors in 2014 to **37.1 MILLION VISITORS** in 2018. Visitors come primarily from the New England, Mid-Atlantic regions of the U.S. and from Eastern Canada and Europe.

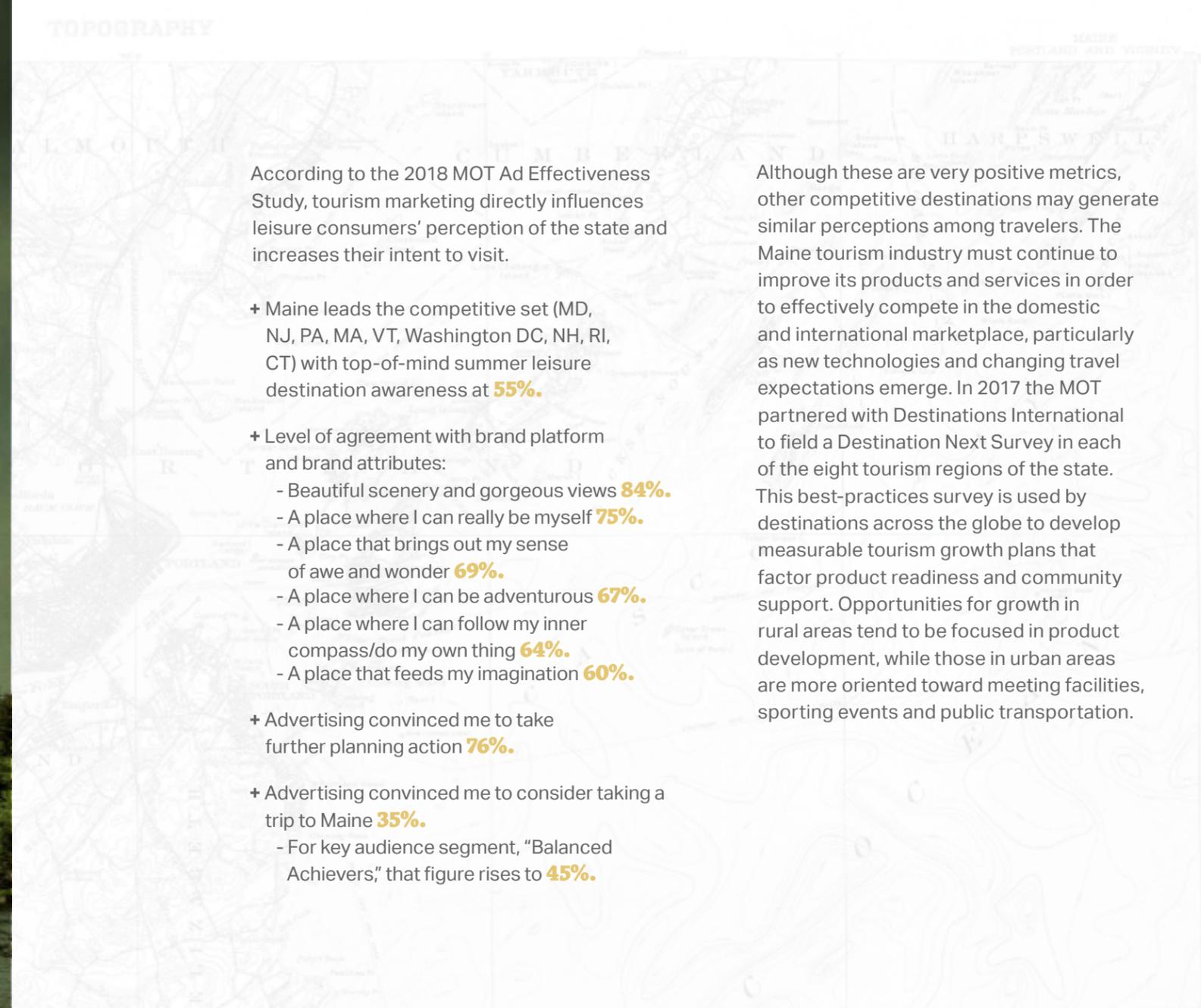
The steady growth seen over the last five years is directly aligned with the stated goals of the prior strategic plan published in 2014.

- + Increased direct tourism expenditures to **\$6.2 BILLION, 3.3% ABOVE GOAL**.
- + Increased gross restaurant and lodging taxable sales to **\$4.02 BILLION, 14% ABOVE GOAL\***.
- \*Source: Maine Revenue Service: Maine Office of Tourism Taxable Sales Report 2018*
- + Successfully trialed three new markets: Washington D.C., Baltimore, MD, Charlotte, NC.
- + Increased the volume of first-time visitors to **6.42 MILLION, 77% ABOVE GOAL**.
- + Grew off-season visitation by **5.2% PER YEAR**, more than five times the goal of 1% annual growth.
- + Increased business-related visitation to **2.2 MILLION**, 40% below goal<sup>1</sup>.

*<sup>1</sup>Set aggressive goal to nearly double business-related visitation. Though we did not meet this goal, we did outperform the national average growth of 5.98% by 5x at 31.8% (2013-2018).*

*<sup>2</sup>Source: Statista Number of domestic business and leisure trips in the United States from 2008 to 2022*

The last five-year strategic plan areas of focus were to develop the pipeline, grow off-season visitation, protect Maine's tourism assets, and make tourism a shared imperative. This new strategic plan carries forward our momentum and successes into the next five years, in addition to identifying new areas of focus and concentration necessary to compete and grow vis-a-vis the current industry life-stage, and the changing social and technological scenario, consumer landscape and competitive environment.



According to the 2018 MOT Ad Effectiveness Study, tourism marketing directly influences leisure consumers' perception of the state and increases their intent to visit.

- + Maine leads the competitive set (MD, NJ, PA, MA, VT, Washington DC, NH, RI, CT) with top-of-mind summer leisure destination awareness at **55%**.
- + Level of agreement with brand platform and brand attributes:
  - Beautiful scenery and gorgeous views **84%**.
  - A place where I can really be myself **75%**.
  - A place that brings out my sense of awe and wonder **69%**.
  - A place where I can be adventurous **67%**.
  - A place where I can follow my inner compass/do my own thing **64%**.
  - A place that feeds my imagination **60%**.
- + Advertising convinced me to take further planning action **76%**.
- + Advertising convinced me to consider taking a trip to Maine **35%**.
  - For key audience segment, "Balanced Achievers," that figure rises to **45%**.

Although these are very positive metrics, other competitive destinations may generate similar perceptions among travelers. The Maine tourism industry must continue to improve its products and services in order to effectively compete in the domestic and international marketplace, particularly as new technologies and changing travel expectations emerge. In 2017 the MOT partnered with Destinations International to field a Destination Next Survey in each of the eight tourism regions of the state. This best-practices survey is used by destinations across the globe to develop measurable tourism growth plans that factor product readiness and community support. Opportunities for growth in rural areas tend to be focused in product development, while those in urban areas are more oriented toward meeting facilities, sporting events and public transportation.



The MOT together with other state agencies, stakeholders, and community partners share the common goal to ensure Maine's visitor economy remains successful and viable well into the future. In developing this plan the MOT spoke to people with broadly divergent points of view and engaged in many conversations about the future of tourism in Maine. The MOT reviewed internal strategies and tactics applied to-date and looked outward to the successes of other destination marketing organizations, as well as trends, travel patterns and changes in consumer decision-making – all of which shape tourism locally, nationally, and internationally. The plan is purpose-built to create a unified plan for the state while addressing the unique challenges at the regional and local level.

**INFORMATION GATHERING**

- + Reviewed outcomes from the previous strategic plan through 2019.
- + Gained insights from other successful destination marketing organizations.
- + Gathered industry trends, outlooks and forecasts.
- + Analyzed both MOT consumer data and other secondary research regarding consumer travel trends.
- + Reviewed results from Destination Next Study conducted in 2017 to assess the overall health and readiness of each of the eight tourism regions of the state.
- + Conducted an internal SWOT analysis to determine strengths, weaknesses, opportunities & threats.

**INDUSTRY OUTREACH AND INPUT**

- + Fielded an online survey sent to 5,644 industry partners, completed by 360.
- + Facilitated listening sessions with 198 tourism businesses and community leaders.
  - 10/16 - Fort Kent, Presque Isle
  - 10/17 - East Millinocket, Bangor
  - 10/18 - Ellsworth, Machias
  - 10/19 - Waterville, Farmington
  - 10/22 - Rockland, Bath
  - 10/23 - Portland, Auburn
  - 10/24 - Wells
- + Monitored an email account set up specifically to facilitate ongoing dialogue.



## EXPERIENTIAL VS. TANGIBLE

What may have seemed like a fad is now a larger acknowledgement of a consumer mindset shift toward experiences over things. According to Travel Pulse, experiential categories such as skip-the-line historical experiences, food tours, and cooking classes have skyrocketed, with year-over-year growth ranging from 50% to 125%. This trend of experience based travel is set to continue with Airbnb and Online Travel Agencies (OTAs) like Travelocity and Expedia gearing up to offer more unique tours and activities. Even retailers like Gucci and Ikea are expanding beyond the tangible with hotels in Europe and the U.S. Destination Marketing Organizations (DMOs)—entities that promote a town, city, region, or country in order to increase the number of visitors who haven't already made the shift from marketing the physical "things to do" to marketing the emotional benefits of travel, will find themselves irrelevant.

## MICROTRAVEL & SPECIFIC LOCALES

Microtravel is a move to more curated adventure that is focused, manageable and illuminating. You see less, but you get more. There is a noticeable swing toward itineraries aiming to make travel more personally rewarding. According to the Globe and Mail, for Millennials microtravel comes naturally. They want their travel self-controlled, seamless and relevant. Services like the new Google Trips help to connect the independent traveler with locals to design a tailored experience. While DMOs still aim to help visitors experience multiple geographic locales in a single trip, the shift to limited locales bodes well for areas ripe with history and cultural experiences.



## CREATING TEMPORARY LOCALS

As destinations begin to grapple with the effects of tourism on local infrastructure and quality of life in popular destinations, many thought leaders are calling on the industry to think less about attracting tourists and more about creating temporary locals. Copenhagen Tourism is encouraging DMOs to keep in mind both the livability of locals and the great visitor experience. Their strategic vision for 2020, titled "The End of Tourism As We Know It" calls for simply creating a "localhood." The shift in thinking here is that the tourism industry can also help visitors add value to the community, instead of asking permanent residents to exchange their quality of life for money. Rather than focusing solely on marketing, they're playing an active role in helping to facilitate interactions between locals and visitors. Interactions with locals provides visitors with more meaningful experiences that contribute to, rather than detract from, the community. DMOs poised for the future need to make the shift from merely destination marketers to community managers, actively determining how to best manage tourism growth.



### SPONTANEITY CELEBRATED

Phocuswright data suggests that more than 60% of travelers would consider an impulse trip based on a good deal on a flight or hotel. Over the last two years, travel related searches on Google for "tonight" and "today" have grown over 150% on mobile. That means an already shrinking planning window is getting even shorter. More and more customers are open to blind booking, a growing trend in Europe. Air carriers Lufthansa and Eurowings now allow passengers to book tickets based on the experience they are seeking without knowing the destination. This means that DMOs need to consider strategies that disrupt traditional trip planning cycles.

### PERSONAL VALUES & BELIEFS DRIVE ACTION

In the 2018 Edelman Earned Brand Study, the global PR firm predicts the rise of the belief-driven buyer. Belief-driven buying is now a mainstream mindset across ages and incomes. People believe that brands, over government, can lead societal change. One in two people surveyed choose, switch or avoid a brand based on its stand on societal issues. Of belief-driven buyers, 67% bought a brand for the first time based on its position on a controversial issue. And 65% will not buy a brand because it stayed silent on an issue it had an obligation to address. When it comes to travel, it's long been known that avid travelers don't just view a vacation as a place to visit, but as a personal reflection of who they are and what they care about. DMOs who can engage travelers based on a shared set of values & beliefs will see positive visitation growth in both volume and economic impact.



### VOICE & DIGITAL ASSISTANTS

Voice technology promises brands a richer and deeper engagement with customers. By identifying moments where voice technology can enhance the customer journey, provide practical support, cut out steps or make life a little easier, brands can build engagement. In a 2017 Google/Phocuswright study, 1 in 3 travelers across countries are using digital assistants to research or book travel and are already searching for everything from hotels to flights to things to do within a destination.

### AI & CHAT BOTS

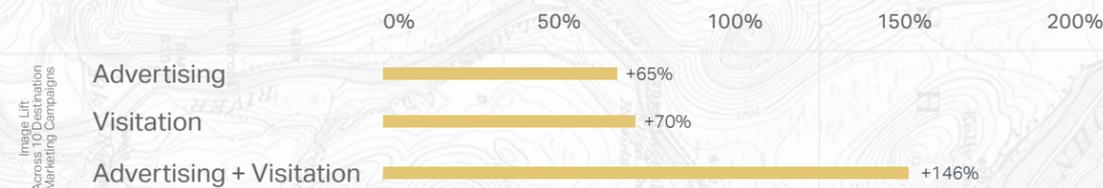
Five billion people use messaging apps each month on the four largest messaging apps, surpassing the number of users on the four largest social networks. Sixty-five percent of Millennials are already talking to and making purchases through bots. The number of messages between businesses and consumers using AI and bot technology has reached 2 billion per month. DMOs should be thinking about how these new tools allow for more personalized direct interactions between destinations and consumers, perhaps over time disrupting the need for traditional planning tools. Sources: Manychat.com, TechCrunch, Statista.

**REALIZE TOURISM AND ECONOMIC DEVELOPMENT ARE LINKED**

Despite the fact that the Maine Office of Tourism and Film sits within the Department of Economic and Community Development, there is a perceived divide between the functions of tourism development and economic development when in reality the two are inextricably linked. It is a common myth that tourism marketing promotes only tourism. Yet there is extensive research to the contrary. In a study published by Longwoods International titled The Halo Effect, tourism marketing is proven to have a profound impact on decisions such as where to start a business, attend college and where to live. Likewise, a recent Oxford Economics study includes extensive discussion of how tourism as “low hanging fruit” opens the door to economic development more quickly and effectively than other avenues like new investments in manufacturing infrastructure, etc. Given the state’s critical workforce shortage, there is a greater

opportunity to highlight the Maine lifestyle in tourism marketing for the benefit of not only tourism growth, but also resident recruitment. Workforce issues such as labor shortage, housing and education are cited in both the industry and Destination Next surveys as a significant issue facing the travel industry. While there has been collaboration in the past between the MOT and DECD, as well as private sector organizations such as Live + Work in Maine, and Maine & Company, there is an expectation by the industry that more meaningful partnerships are now warranted. The industry would benefit from a better understanding for how these two entities – tourism and economic development at the public and private level – are working together to address key economic issues within the state.

A GOOD PLACE TO LIVE



One factor in determining how people view a destination is whether they deem it a good place to live. And those who see tourism advertising and then visit come away with a good impression of those destinations.

Source: Longwoods International

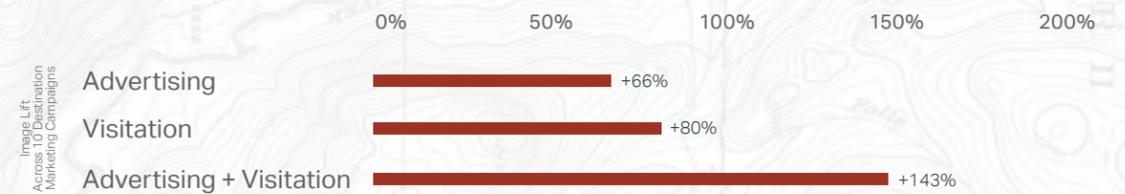
A GOOD PLACE TO START A BUSINESS



Destinations have many economic development goals, including the launch of new businesses. When executives are exposed to advertising and visits, those destinations are more likely to be viewed as desirable locations.

Source: Longwoods International

A GOOD PLACE TO ATTEND COLLEGE



Colleges and universities are now seen as catalysts for economic impact. Destination advertising and visitation can make cities a more attractive choice for students.

Source: Longwoods International



**SELL THE VALUE OF TOURISM  
IN A PERSONAL WAY**

To fully realize the positive impact tourism marketing can make within the state requires the support of residents, the travel industry as well as local and state elected officials. While the MOT and organizations such as the Maine Tourism Association, Hospitality Maine, Retail Association of Maine and many others play an important role in tourism advocacy, the industry believes that a greater, more impactful effort is required, one that relies less on facts and figures, and more on personal stories and relationship building. Some within the tourism industry currently believe that residents are not supportive; however, in a 2015 Value of Tourism Survey, two in three Maine residents rated tourism over 14 other industries as the most favorable, citing tourism as the most important “engine” of Maine’s economy, and as having the biggest multiplier effect in terms of supporting businesses, jobs, and tax revenue. Nearly one-half of Maine residents would prefer some more (31%), or much more (14%) tourism in their community. Future value of tourism efforts should build upon this goodwill at the local level and foster engagement between constituents and legislators where tourism is a common goal.

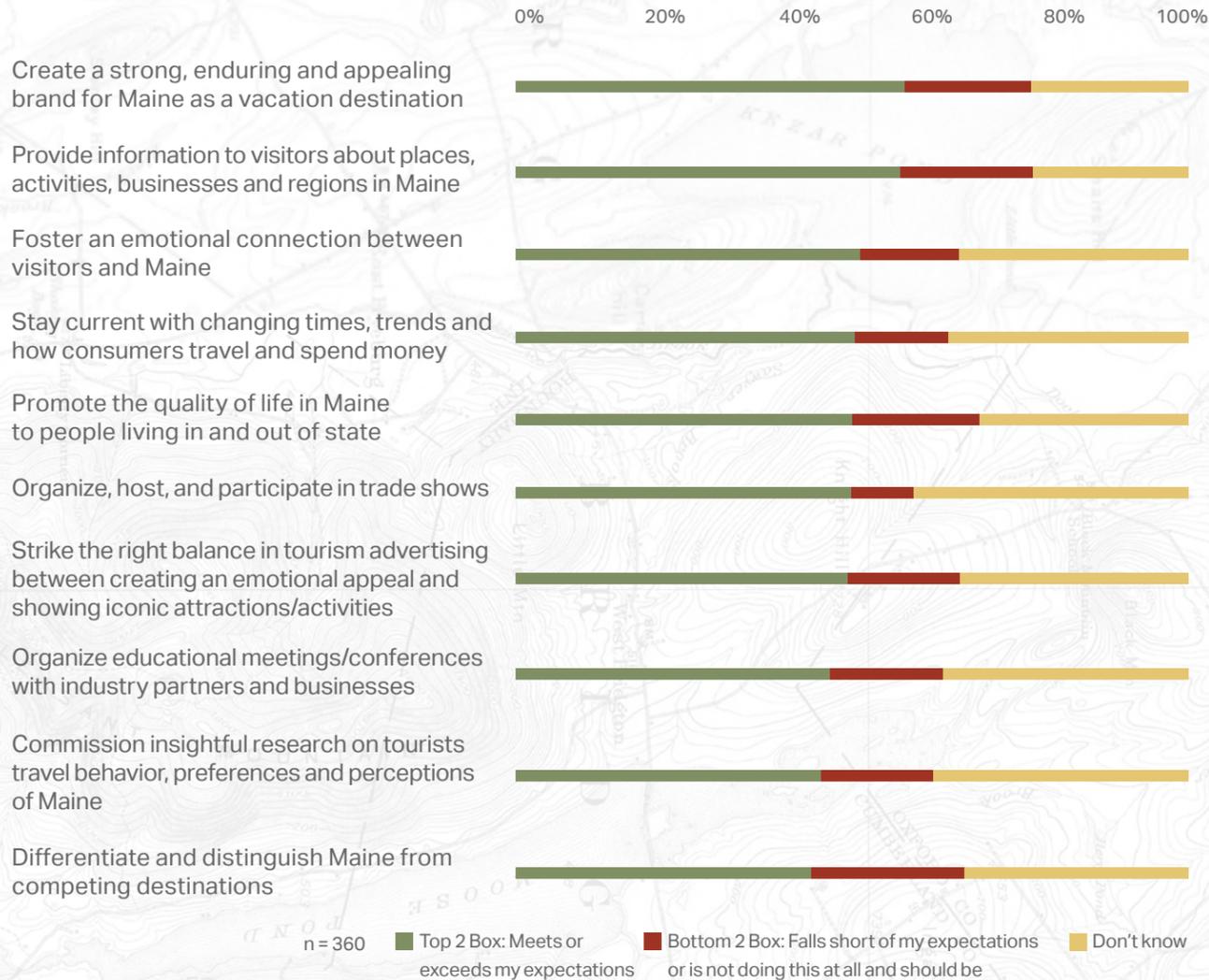


**DESTINATION MARKETING PROGRAMS ARE STRONG**

According to the 2018 Ad Effectiveness Study, as well as individual channel metrics, the advertising campaign is working effectively to drive visitation. Nearly 60% of the industry surveyed agree the MOT has created a strong, enduring and appealing brand for Maine as a leisure destination, a brand that differentiates and distinguishes Maine

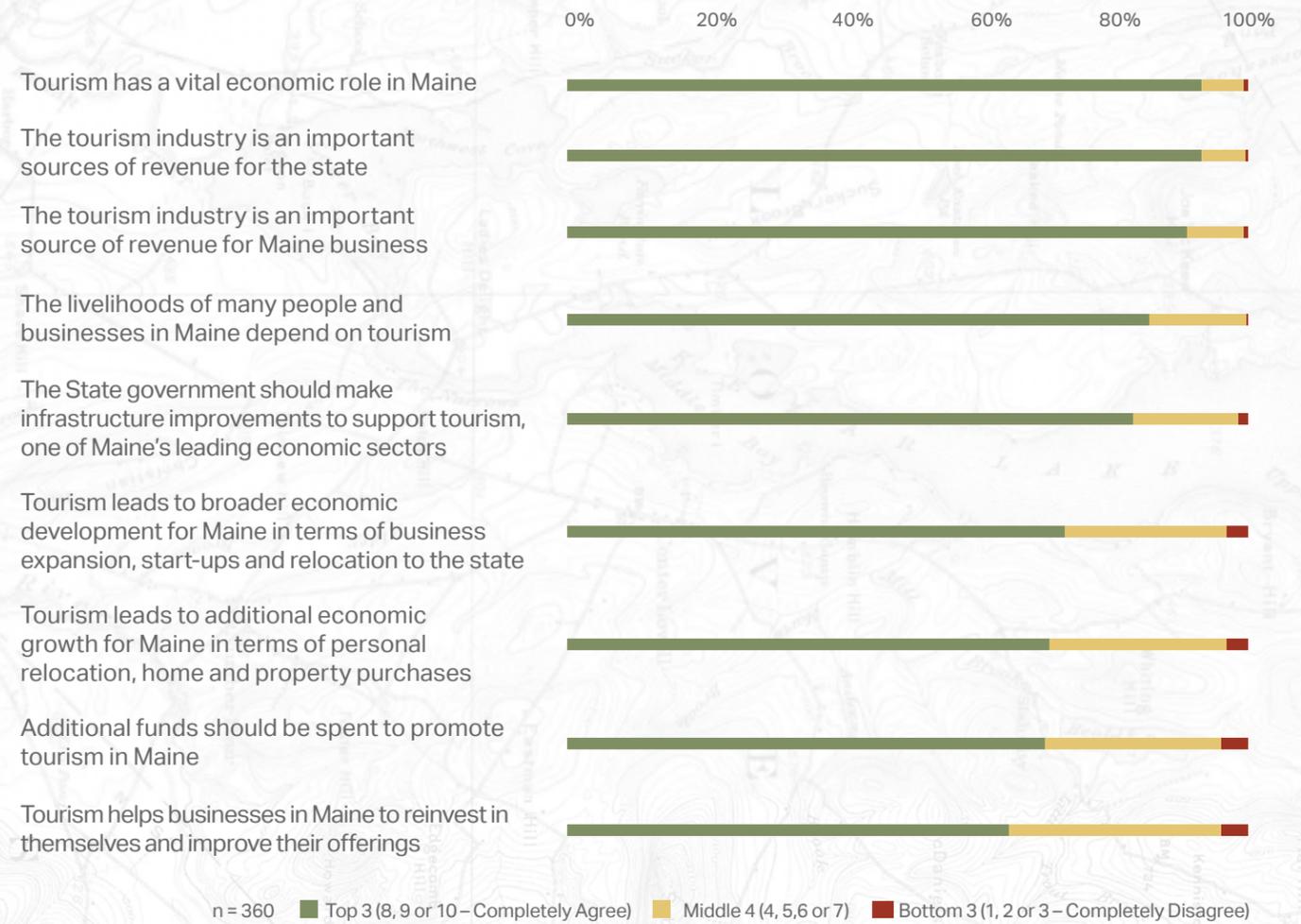
from other New England destinations. The MOT should continue to evaluate changing technologies to benefit the tourism industry, take advantage of new markets and opportunities while being good stewards of the budget, and delivering a solid return on investment. Marketing is the single most important role for the organization according to the industry.

MOT FUNCTION PERFORMANCE



Source: Maine Office of Tourism: Industry Stakeholder Survey 2018

OPINIONS, ATTITUDES, AND BELIEFS ABOUT TOURISM



Source: Maine Office of Tourism: Industry Stakeholder Survey 2018



**A TOP-DOWN APPROACH TO COMMUNICATIONS IS NOT WORKING**

Despite the tools put in place as a result of the previous strategic plan, it is clear there is still a greater need for more effective communication within the industry. The top-down approach currently in place relies heavily on MOT staff and Regional Destination Marketing Organizations (RDMO) to push information down to the local community level. Factoring the size of the MOT staff, and part-time nature of the RDMO representatives, communication and education is often a lesser priority. While best practices e-mail communications are in place, along with

industry and media updates through the MOT Industry Twitter feed and LinkedIn, as well as boots-on-the-ground efforts by MOT in several in-state destination areas, there is a perceived lack of personal involvement on the part of the MOT at the local level. This means that many tourism businesses feel both uninformed and unheard. While the tourism industry is aware of the MOT's overall mission, they lack understanding at the program and tactical level. They are unaware how to harness what is happening at the state level to benefit their business.



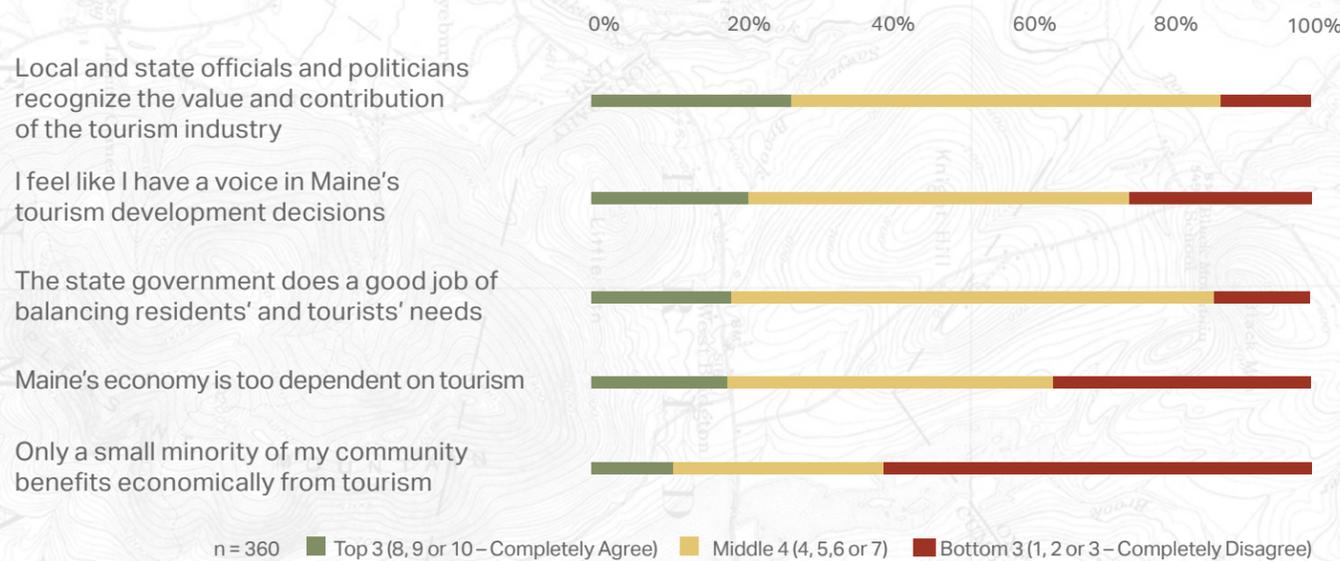
**EVOLVE BEYOND MARKETING INTO MANAGEMENT**

In order to become a more effective marketing organization it is necessary for the MOT to develop a management plan that creates the infrastructure for connecting the industry at the state, regional and local level. It is evident that there is good work being done by many chambers of commerce, convention & visitors bureaus and individual tourism businesses. But without a stronger single unifying organization, efficiencies are lost and the resulting work is duplicative and labor intensive. A new structure that incorporates education, communication and product development is desired in order to gain productivity. A key component of the plan requires the MOT to identify what tourism "readiness" means at the local level to help nurture new tourism infrastructure, and as a result generate better visitor outcomes.

**BALANCING THE VISITOR EXPERIENCE IS IMPORTANT**

Maine is fortunate to have such a deep well of experiences to offer visitors. Its downtowns and main streets still represent an idyllic, simpler lifestyle that is centered around community. This lifestyle rooted in a better work-life balance, where priorities are placed on living life well and feeling that all things are still possible. Portland's ranking by Bon Appétit Magazine as 2018's Food City of the Year, has skyrocketed the city's reputation as a culinary destination in its own right. Bangor's reputation as a center for music and entertainment is taking shape. And while Maine is well-known for year-round outdoor sports and recreation, its visibility as an outdoor recreation area has often been overshadowed by New Hampshire, Vermont and the Adirondacks. The industry's challenge lies in balancing visitor volume so that crowded, more iconic areas do not become overwhelmed while lesser known destinations go unnoticed. Cross-regional collaboration is the first step in rebalancing visitor volume. Introducing itineraries or packaged products that combine multiple destinations and experiences throughout the state can be effective in moving visitors into lesser known areas.

OPINIONS, ATTITUDES, AND BELIEFS ABOUT TOURISM



Source: Maine Office of Tourism: Industry Stakeholder Survey 2018



## ALIGN PRODUCT DEVELOPMENT WITH CONSUMER DEMAND

If the industry is to be effective in developing new visitor experiences, then it must stop underestimating and taking for granted the simple/genuine experiences that a new generation of visitors is actually seeking. Moving forward product development should be aligned with Maine's natural strengths and consumer demand. Emerging opportunities to consider include agritourism, film, Native American cultural heritage, and Maine guides and outfitters. In some cases where strong visitor experiences already exist, more information and better packaging is required for consumers to understand how and where to access them. In other cases, product development is needed to match the requirements of being truly "visitor ready."

- + 53% of consumers say they place more value in last three to five years on transformative travel experiences.
- + 75% of consumers say it's important to connect with locals while on vacation.
- + 53% of consumers say they don't want to feel like a tourist while on vacation.
- + 74% of consumers say that improving my physical and emotional wellbeing is more of a focus for me today than it was three years ago.
- + 65% of consumers say they want to come back from a vacation having experienced something new. Experiencing something new is now far outweighing more traditional outcomes such as feeling rested and recharged at 35%.

Sources: SKIFT High Income Traveler Survey 2017, SKIFT US Experiential Traveler Survey 2017

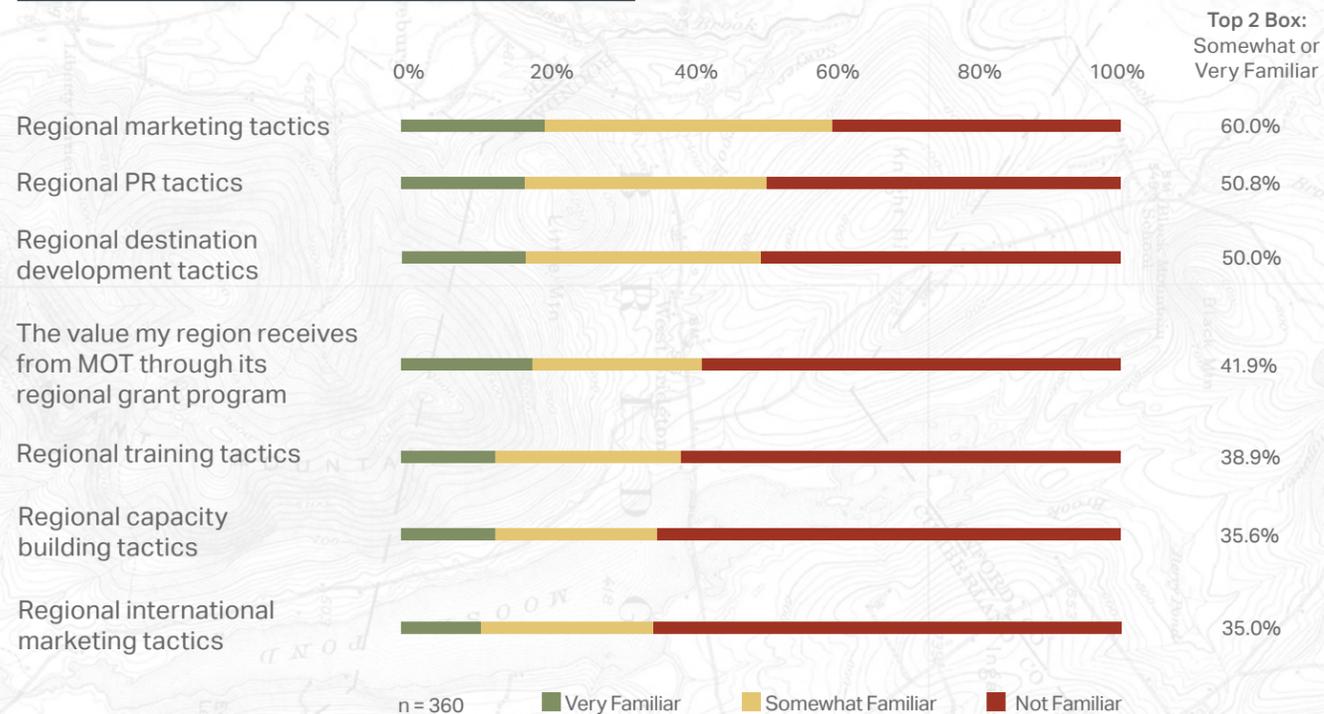
**REGIONAL STRUCTURE WARRANTS EVALUATION**

Funded through a matching grants program managed by the MOT, the state of Maine is divided into eight designated tourism regions. Each Regional Destination Marketing Organization (RDMO) is eligible to apply for marketing grant dollars in May to fund annual marketing programs focused on driving visitation to the region. While the MOT works closely with each of the RDMO grant managers, it's clear from the industry survey that local tourism businesses aren't aware of the region's marketing initiatives. RDMOs are not well equipped to handle responsibilities beyond marketing plan execution. Most grant managers are part-time employees with limited time and resources; therefore, minimal effort is spent communicating with and educating tourism businesses within the region on the organization's role, programs and resulting value.

The original intent behind the regional structure and grant program was for RDMOs to grow into more robust, self-sustainable organizations over time. However, regional budgets remain flat. RDMOs have limited time and personnel resources to actively pursue revenue sources outside of the grant and required match. As a result, grant review committee members who evaluate the effectiveness of the regional efforts question whether budgets are adequate to drive significant tourism growth.

There is a consensus that the regional structure needs reimagining, so that dollars invested into regional marketing are spent more effectively. The MOT can draw inspiration not only from the local industry, but from other state DMOs who are running similar programs that are more efficient, scalable, with improved processes and community buy-in.

**FAMILIARITY WITH REGIONAL DMO INITIATIVES**



Source: Maine Office of Tourism: Industry Stakeholder Survey 2018



Our collective ambition is the MOT's roadmap for how tourism should be cultivated over the next five years based on key principles, goals and responsibilities. This plan is built upon five strategic imperatives that relate to sound tourism business practices, as well as align with the insights and trends previously identified. All five pillars are designed to work in concert with one another – success in one area enhances success in the others. Further, each imperative acting as a pillar for the five-year strategic plan, recognizes that statewide success will only be possible with collaboration and support from the tourism industry, elected public officials, Maine residents, business leaders, other governmental departments and entities, and of course, the MOT. This means raising the bar on collective efforts to communicate, innovate, protect the assets and resources that underpin the Maine brand and the visitor experience, problem-solve and expand our thinking across the entire lifecycle of our industry.

- 1. BE REAL/AUTHENTIC**
- 2. BUILD COLLABORATION AND PARTNERSHIP**
- 3. MAKE SITES/PROGRAMS COME ALIVE**
- 4. BALANCE COMMUNITY AND TOURISM**
- 5. UNDERSTAND READINESS**



The research, data and insight collection, listening sessions and other feedback surfaced a lot of new thinking which is integrated into this plan. While the tourism industry in Maine has been growing and prospering over the past five years, in some cases well above national norms, our goal is to build an even stronger foundation for the state moving forward. In fact, the findings from nearly 10 months of input, research and reflection point to several new issues, practices and initiatives that the MOT and the entire tourism industry in Maine can embrace in the next five years to offset challenges and maximize opportunities for our collective advantage. Accordingly, each pillar is supported by strategies and initiatives aimed at guiding the Maine Office of Tourism and Film and our industry partners in continuing to build and evolve Maine's tourism industry and economy.





## 1. BE REAL/AUTHENTIC

Being real/authentic is an on-going requirement for all tourism destinations. For the past seven years, the Maine brand has leveraged the insight that visitors to the state follow their own paths to discover and experience their own Maine thing. From a marketing and destination management perspective, it's more than simply having an incredible landscape and outdoor assets. It's also about fostering practices that perpetuate Maine's diverse and unique cultural heritage, while staying true to the DNA and lifestyle of Maine. Thus, it is essential to keep the brand vital through preserving and expanding core programs while achieving greater integration and synergy across channels, groups, cohorts, and technology platforms, and by embracing the shifting consumer and media landscape and continuing to differentiate the state through unique and genuine visitor experiences.

### KEY STRATEGIES & INITIATIVES:

- + Deploy efforts that enable the Maine brand to transcend the travel category and enhance the value and appeal of the Maine lifestyle, including supporting the 2020 Bicentennial celebration.
- Increase relevance in the actual and perceived importance of the brand to consumers by matching their beliefs that experiences build their personal identities, a range of experiences define their lives, and value is based on meaning and worth, not price.
- Enrich the brand through greater efficiency, layering and integration of paid, owned, earned and shared media channels so that the holistic Maine story can be told synergistically—from a brand perspective, through the lens of originality, and throughout the travel lifecycle.
- Continue to build the Maine brand to competitively position the state and inspire overnight leisure visitation through industry-leading branding, marketing and communications.
- Continue to deepen our relationship with consumers to move beyond providing inspiration to engage potential Maine visitors during every stage of the travel lifecycle.
- Continue to audit past media coverage to determine the subjects and story ideas that best resonate with media, finding ways to elevate (rather than recycle) ideas for future coverage related to the Maine lifestyle brand.
- Review the MOT's existing tool set to determine which are aligned with new technologies to keep pace with how consumers are planning travel.



KEY STRATEGIES & INITIATIVES CONT.:

- + Deploy efforts to better target and drive new and sustained visitation, including identifying and prioritizing new potential geographic markets and/or niche audiences.
- Continue to create tangible visitor experiences and activities tying agribusiness to cultural heritage in partnership with other state agencies, nonprofits, other brands and associations, as well as amplifying Maine's outdoor brand.
- Add new geographic markets of opportunity.
- Expand road trip itineraries to help move visitors around the state/across regions, and links to additional resources from MOT's web site (e.g., Tentrr.com).
- Discuss possible collaboration with Native American tribes, if they are interested, to jointly develop Native American cultural heritage tourism programs.
- Creatively package film festival itineraries based on film locations (where films were set even if they weren't filmed in Maine) to invite visitors to be part of the backstory, and behind-the-scenes creation and production.
- Revisit current regional grant guidelines with respect to allowing regions to market in-state—for northern interior areas, Mainers may be the best visitor prospects.

- In concert with the Maine lifestyle brand, leverage findings from the Workforce and Business Attraction Research Report to help people overcome perceived (and real) barriers to drive resident recruitment by enticing them to visit, purchase second homes, relocate, etc.
- Provide support to or partner with entities already engaged in tactical efforts toward this goal, such as Live + Work in Maine, on programs focused on alumni association outreach and multi-class reunion events, Discover New England's efforts to attract the international student market, or the Northern New England Passenger Rail Authority (NNEPRA) board, etc.
- + Make authenticity and sustainability a more overt part of the Maine brand: authentic places, meeting the locals, real versus manufactured or contrived experiences.
- Deepen and update research on consumer segments to keep pace with changes in media buying and consumer travel planning behaviors.
- Attract visitors who are environmentally conscious and contribute as good citizens when traveling in the state, encouraging "localhood" behaviors.

*Metrics: Brand Health and Ad Effectiveness measures (including increase in annual earned media impressions, growth in volume of leisure visits to Maine YOY, increase in incremental visitor spending YOY, and lifestyle brand metrics), Consumer Segmentation & Psychology measurements (including affinity to care for and protect the natural environment, visitor satisfaction).*



## 2. BUILD COLLABORATION AND PARTNERSHIP

Building collaboration and partnership is about supporting and empowering Maine's tourism industry. As an effective leader, the Maine Office of Tourism and Film must be a forward-thinking, knowledge-based organization that uses information and research to develop programs and policies, streamlines communications between and across industry entities, and fosters respectful and responsive collaboration with mutually beneficial solutions that affect tourism industry product, education, and planning. It's about championing the value of tourism, as well as running tourism – the Maine Office of Tourism and Film – as an effective business. Ultimately, the goal is to collectively optimize statewide economic impact of tourism and film through shared communication, collaboration, integration and scale.



### KEY STRATEGIES & INITIATIVES:

- + Create a separate plan of action to re-evaluate the existing regional model for maximum efficiency and effectiveness and research other potential models in order to restructure it (inclusive of process, roles, responsibilities, accountabilities, funding criteria, etc.) so that it can better support product development, clarify the roles of the RDMOs, align ground-up with top-down communications flow coordinated with the MOT's marketing initiatives, and ultimately drive regional visitation.
  - In cooperation with industry partners, take a fresh look at establishing regional theming or boundaries that would provide industry partners with platforms for meaningful marketing collaborations.
- + Deploy new grant application software and revamp guidelines that set realistic expectations and minimum requirements for regions, while reevaluating the entire grant program in context of any potential new regional structure to better:
  - Incentivize RDMOs to work together.
  - Educate RDMOs on how to write effective grants.
  - Encourage more regional coordination by engaging each RDMO more deeply into the grant process so they are aware of individual entities within their own region applying for other state grants, and work toward making the RDMO website the "go to" site rather than developing new separate sites for trails, attractions or individual business.
  - Enable RDMOs to develop education sessions for their own area businesses and legislators about what there is to do and how their marketing showcases the area.
  - Aggregate the sources of grants across all state agencies to make it easier for partners to understand what's available to them.
- + Provide destination management learning opportunities for the tourism industry, with a focus on purposeful collaboration and developing new/emerging leadership, from the ground-up to further strengthen the MOT's relationship with the tourism industry.
  - Reevaluate the MOT's staff responsibilities to better foster ground-up communication and education.
    - Explore the feasibility of having a full-time representative in each region to support ground-up/top-down communication flow, coordinated and aligned with MOT strategic marketing initiatives.
    - Provide additional education and communication within regions for front-line staff to understand the area's tourism product, how each RDMO and the MOT work together; how individual businesses can collaborate with their RDMO.
  - Improve industry communications about current and upcoming MOT programs on a more frequent, boots-on-the ground basis.
    - Send out press releases about what MOT is doing with other partners.
    - Develop content that explains the roles and responsibilities of the Maine Office of Tourism and Film, the Maine Tourism Association, and RDMOs.
    - Create awareness of marketing programs among stakeholders, communicating to local businesses about the media and types of programs that benefit their markets, including broadcast shoots, travel trade and media FAMs, annual visitor guide stories, website features, social media, etc.

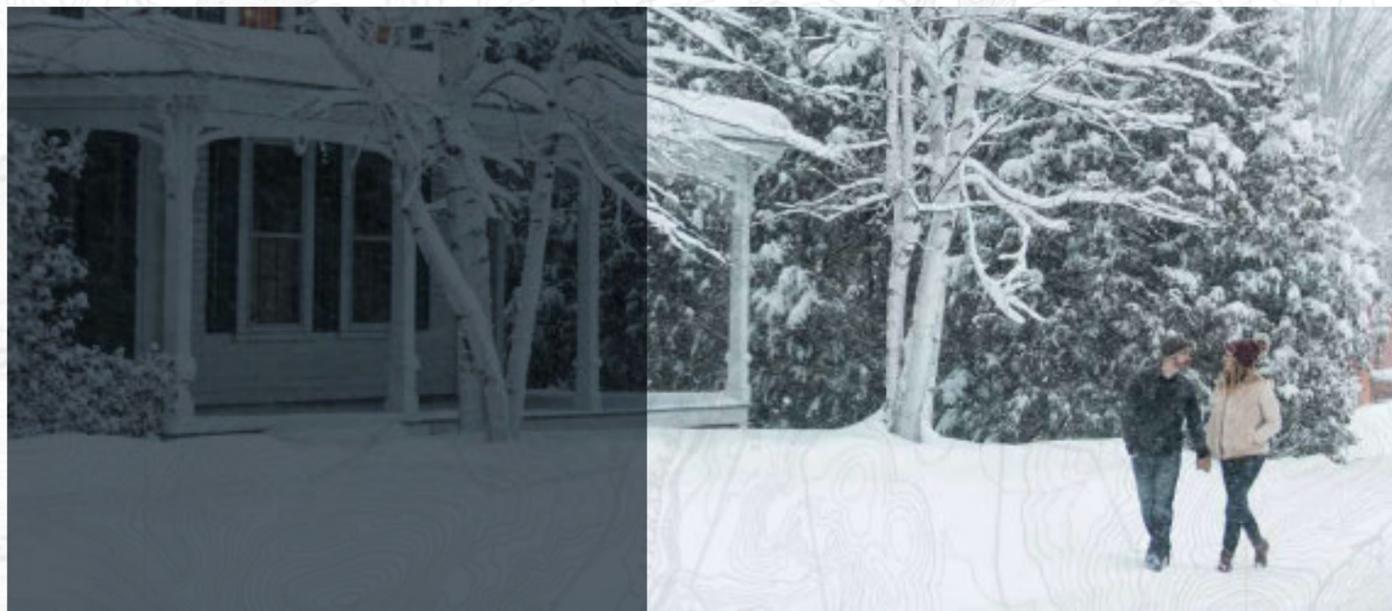
KEY STRATEGIES & INITIATIVES CONT.:

- Facilitate exchange of ideas and best practices to accelerate industry innovation.
  - Improve alignment and cooperation across governmental agencies and departments to leverage resources and capacity to address key infrastructure, workforce, and technology issues.
- Build the necessary relationships to make tourism a key component of leadership mentoring programs in partnership with statewide leadership and development organizations and the DECD, promoting career pathways to inspire future tourism professionals and leaders.
- + Collaborate with Maine tourism organizations to unify industry leaders to raise the relevance of the travel industry, with the goal of elevating elected officials' perception of the importance of the industry and creating a unified voice for tourism.
  - Develop a communications plan with statewide tourism organizations, local chambers of commerce, and individual tourism businesses to outline the most effective communications hierarchy along with shared and individual responsibilities to engage policymakers to strengthen Maine's tourism industry and economy.
  - Package successes to legislators including context of the other industries showing where tourism stacks up to the rest of the economy in the state, what it means to the state financially, and how it has a halo effect on economic development, using a bottom-up approach that personalizes why travel matters via human interest stories.

- Amplify Maine's tourism story and reinforce how it connects to local communities and to the statewide economy by providing consistent, simple, compelling messages that highlight the economic contributions of tourism for industry leaders to use when speaking about why travel matters.
- Educate elected officials and legislators in targeted regions with "in your district" fact sheets and/or a monthly digital campaign with important statistics, stories and highlighted businesses.
- Create an elevator speech for the business community to help drive advocacy.
- Create templated invitations to enable elected officials to activate their own social networks and followers by identifying what's in it for them.

- + Take an entrepreneurial approach to growth by supporting public/private partnerships and forming strategic alliances with other in-state entities (e.g., Maine Outdoor Brands, Maine Lobstermen's Association, etc.) to extend reach and penetrate new audiences to help fuel brand vitality, continuing to shift Maine from an experiential travel brand to an experiential lifestyle brand, with the potential to have relevance and influence in one's daily life (not just when considering a trip).
  - Co-market with powerful business-to-consumer (B2C) brands—including those in adjacent categories—such as apparel, airlines, finance, technology, personalities, culinary, retail, outdoor and/or adventure.
  - Improve tie-ins with US Travel Association programs (e.g. Project Time Off, National Travel and Tourism week, National Plan for Vacation Day, etc.) to raise Maine's tourism visibility on a national level.
- + Continuously review, improve and document policies, processes and procedures.

*Metrics: Collaboration Management metrics (including local engagement and effectiveness of RDMOs), growth in leisure and hospitality jobs, growth in leisure and hospitality sales tax revenue.*



### 3. MAKE SITES/PROGRAMS COME ALIVE

Making sites and programs come alive emphasizes the co-creation of deeper engagements, interactions and tourism experiences—across audiences and constituencies. It's about helping regions and communities to recognize their strengths and weaknesses and support them in working together to develop robust tourist experiences (not just at individual attractions). This includes leveraging emerging technology to increase the depth and range of storytelling about Maine's tourism experiences and putting them in context of the whole state, as well as the wider world in which we live.



#### KEY STRATEGIES & INITIATIVES:

- + Employ "always on" marketing tactics to better enable consumers to interact with the brand on their time, on their terms—whether it's detailed trip planning, spontaneous experiences, or living the Maine brand lifestyle—by identifying life stage "moments" and aligning them to destination offerings.
  - Strengthen integrated PR, strategic partnerships and marketing efforts to further extend Maine's brand reach.
  - Utilize new media trends and channels to ensure strong brand experience.
  - Create content about how to "do Maine better" juxtaposing coast and inland, nature and culture, city and rural, passive and active, and how the Maine lifestyle relates to activities within each region's natural assets.
    - Develop trip ideas and itineraries around undiscovered gems.
    - On visitmaine.com optimize visibility and ease of accessing what's already in existence, for example, dark skies trails, beer trail, bike trail, sculpture trail, things to do/trip ideas, by taking the content that already exists and making it more user-friendly around how one can best experience Maine.
- + Educate stakeholders on the Maine lifestyle strategy and messaging as the campaign evolves, reinforcing Maine's tourism brand story and how it connects to local communities.
- Proactively seek out strategic speaking opportunities to maintain strong relationships with industry partners and communicate tourism value to the business community.
- Deploy a shared B2B social media strategy (i.e., Facebook or a freestanding community software) to operate an online community of Maine travel professionals to create kinship and a common platform for communication within the travel and tourism community.
- Develop and execute a strategy for connecting to members of the community outside the tourism bubble.
- + Continue to expand training for individual businesses to learn how to script, stage and tell their story consistently to the visiting public, as part of the Office's destination development program for destination areas.
- + Evaluate ongoing sustainability of existing products that are currently successful but might not be without the MOT by establishing guidelines for partnership and product evolution, and criteria for financial support to ensure they are tourism-focused, tourism-ready, and financially self-sustaining over time.

*Metrics: Consumer Content Engagement measurements (including website visits, itinerary and video views, increases in destination familiarity, growth in length of stay, and incremental gains in travel generated direct spending), number of weeks for "always on" strategies and initiatives, and baseline for financial support/new grant standards (to be developed).*

#### 4. BALANCE COMMUNITY AND TOURISM

A successful tourism economy balances the needs of residents, communities, visitors and the destination. It's about guiding tourism in a way that achieves the optimal balance of visitation, economic impact, sustainability of our state's tourism assets and livability. To do so requires on-going community support for tourism and stewardship of the destination, its assets and the visitor experience.

##### KEY STRATEGIES & INITIATIVES:

+ Reinforce resident appreciation of tourism's importance and provide education for the industry about resident's perceived value of tourism to align these two perspectives utilizing key insights from the Resident Value of Tourism study.

+ Pilot efforts to help rebalance visitation to better match capacity.

- Deploy in-state mobile proximity marketing tactics using geo-fencing technology to entice visitation to nearby venues.

- Create a program for visitors and Maine residents that rewards visiting off-the-beaten path destinations with culturally rich experiences, ideally syncing up with destination plans of the Maine Parks & Lands Bureau, Maine Department of Transportation, Maine Department of Inland Fisheries & Wildlife and Maine Department of Agriculture, Conservation & Forestry.

- Identify high demand destination experiences and identify steps and initiatives that could lead to longer-range sustainability for those experiences.

- Enrich utilization of Registered Maine Guides.

• Generate consumer awareness of Registered Maine Guides program as a means to discover lesser known in-state destinations through in-depth recreational activities and an elevated outdoor experience.

- Explore options with the Maine Motorcoach Network to smooth out high demand peaks and valleys.

*Metrics: Value of Tourism measures (including percentage of residents who agree tourism brings more benefits than problems to the state, percentage of residents who feel tourism should be actively encouraged in their communities, percentage of residents who feel the MOT helps to preserve Maine's unique cultural heritage and tourism assets, quality of life).*



## 5. UNDERSTAND READINESS

Tourism readiness is about clearly understanding what we have to offer and how it differs from the competition, as well as how we may need to diversify based on the constraints of our attractions, venues, lodging, sites and activities. It means each organization within our tourism industry is clear on what their product or service offering is, and understands who they are currently selling to, as well as who they could be targeting. Bottom line, it's about marketing what we have by finding the target market that's most interested in it, keeping in mind that new or enhanced experiences may need to be developed to have real appeal for visitors.

### KEY STRATEGIES & INITIATIVES:

- + Continue to incorporate the findings of the Destination Next survey into Destination Development, building out programs, and gauging progress over time in closing the gap in product readiness and plan development in rural communities.
- + Continue to provide education and support to local businesses to understand what it means to be truly visitor ready.
- Develop guidelines to assist industry partners in creating positive visitor experiences related to readiness that fit a range of community needs.

- + Facilitate the development of world-class tourism product in partnership with community leaders, tourism businesses, and key agencies, including identification of ways to improve accommodations to meet customer needs and expectations.
  - Leverage opportunities to address limited lodging in underserved areas and training their hosts to act as tour guides for visitors, adding an experiential component to the lodging offering.
  - Determine how to obtain occupancy data from regions that reflect the nature and type of accommodations in Maine beyond branded properties.
- + Create a certified film-friendly community designation to generate connections across the state that tie neighborhoods together.
  - Consider how this program could also be leveraged to work with agritourism, FAM trips, etc.

*Metrics: Readiness metrics (including checklist, new product launch longevity and up-take, and tracking progress via follow-up Destination Next waves).*



## GOAL SETTING TO MEASURE PROGRESS AND ACHIEVE SUCCESS

In addition to tracking individual metrics assigned to each imperative pillar, targets have been established to measure overall plan implementation success at three areas of underlying focus:

### TOURISM BUSINESS GOALS:

- + Increase direct tourism expenditures to **\$7.1 BILLION.\***
- + Increase gross restaurant and lodging taxable sales by **\$640 MILLION,** to a total of **\$4.7 BILLION.\*\***
- + Increase leisure visitation volume by **4.9 MILLION.\***

\*Source: Davidson-Peterson Associates

\*\*Source: Maine Revenue Service: Maine Office of Tourism Taxable Sales Report 2018

### VALUE OF TOURISM GOALS:

- + Increase resident agreement that tourism enhances their quality of life from **30% to 45%.**
- + Maintain residents' favorability of tourism rating of at least **66%.**

### COMMUNICATION, EDUCATION & COLLABORATION GOALS:

- + Increase industry familiarity (top box) with the value my region receives from MOT through its regional grant program from **18% to 25%.**
- + Increase industry agreement that they have a voice in Maine's tourism development decisions from **22% to 30%.**
- + Increase industry evaluation of MOT performance (top two box) on unify stakeholders toward a common goal with respect to Maine's tourism industry from **28% to 35%.**
- + Increase industry evaluation of MOT performance (top two box) to showcase the value of the MOT and the success of its efforts to the industry and state officials from **22% to 30%.**





# Maine