



Maine Office of Tourism | Tourism Advisory Group

June 16th, 2022



Thank you for being here today!
Your voice is important.

What we'll tackle today:

9:00 – 9:30

Introductions

9:30 – 9:45

Project Overview

9:45 – 10:45

Situation Assessment

10:45 – 11:15

Vision Exercise

11:15 – 11:45

Share-Out & Discussion

11:45 – 12:00

Next Steps

Project Overview & Timeline

January - June

June – September

October – November



Get Clear

Get Focused

Get Moving



Situation Assessment

Demand Trends

Consumer concern for sustainability and regenerative travel

Pent-up demand for domestic leisure travel

Long tail pandemic impacts

Changing business travel

Tour operators & travel agents

Experiential and active travel

Rural destinations

Rise in Airbnb

Millennial & Gen Z purchasing power

Responsible travel

Inclusive travel & recreation

Supply Trends

Consumer concern for sustainability and regenerative travel

Oil surges affecting airlines

Workforce shortages

The Great Resignation

Rapid ADR growth at high-end accommodations

Restaurant sector recovery

Short-term rentals

Inconsistency of travel experience

Threats to natural assets

Growing community engagement in tourism-related issues

Robust Stakeholder Engagement



Sustainable Tourism

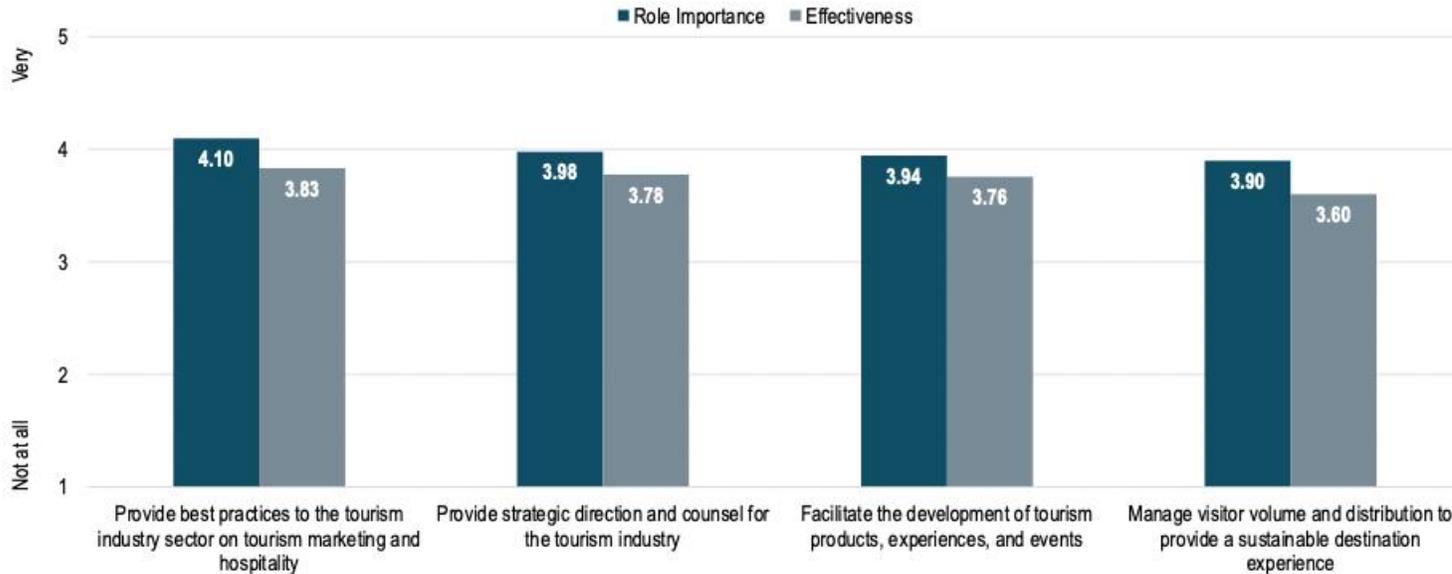


Implications

1. The recent increased demand for outdoor recreation and nature experiences bodes well for Maine's tourism growth, but also exacerbates the challenges of maintenance, repair and renewal. MOT will need to **carefully weigh its role in incentivizing and supporting programs and behaviors to advance stewardship and sustainable tourism management.**
2. MOT may consider **leading the development of programs and messaging** to set behavioral expectations and build a **culture of destination stewardship among both residents and visitors.**
3. It will become increasingly important for MOT to **continue to increase awareness of the positive impacts of tourism** while advancing Maine's strategic approach to sustainable tourism management. **Effective communication** will extend beyond purely economic arguments, highlighting additional benefits. Tourism facilities are better for Mainers because tourists use them and spend their money while doing so.
4. MOT should engage with key stakeholders on negative impacts of tourism in a meaningful way in an attempt to develop solutions with stakeholders that ameliorate issues.

Appendix 1.8 – Management Roles N=284

Please rank how important the following destination management roles are to you and the success of Maine as a destination, and how effective the Maine Office of Tourism is at these roles:



- Infrastructure, transportation, wayfinding, and limited lodging are some of the top challenges for the destination.
- Tourism supports are rated low by stakeholders; transportation, wayfinding, and infrastructure are rated especially low.
- Recovery grant programs for tourism-oriented infrastructure are a top recovery strategy.
- Facilitation of development of tourism products was identified as an important role for MOT.

2. Stakeholders see a need for investment in Maine’s existing tourism infrastructure, as well as a focus on building new assets and resources to ensure readiness for future demands.

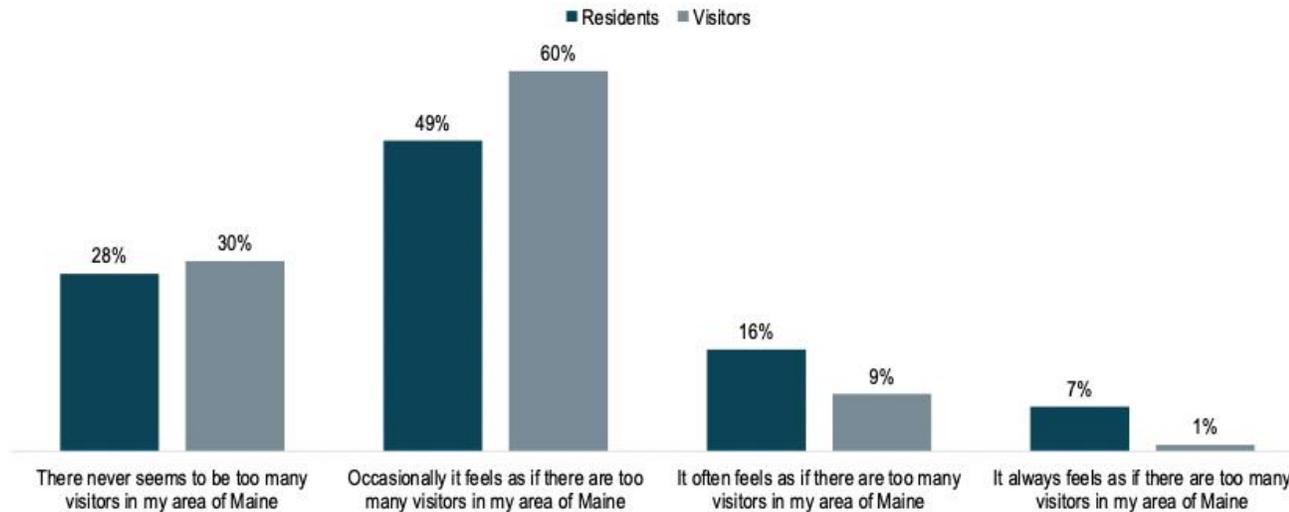
Implications

1. While both transportation and infrastructure improvement are outside of MOT's direct control, they are **critical to a successful visitor economy**. MOT will need to **assess and then leverage its influence** and good relationships to partner with other organizations to help establish, strengthen, and encourage tourism-oriented infrastructure development.
2. Continued marketing of the destination without supporting the infrastructure and responsible development of the destination can lead to **poor visitor experience and detract from Maine's brand perception**.
3. Heavy reliance on cars may serve as a long-term threat as visitors are increasingly considering **environmental impacts when traveling**. MOT may support the development of EV infrastructure and develop products such as EV trails to support the **transition to electric vehicles**.
4. MOT may need to develop **new internal capabilities** or establish **long term partnerships** with other agencies to facilitate and enable **destination development**.
5. **Infrastructure development** can increase carrying capacity and **improve visitor and resident experience**. It supports tourism growth and enhances destination brand. An encouraging, recent example of infrastructure investment includes **the \$50 million initiative** by Governor Mills with Maine State Parks to undertake **critical repairs, safety improvements and technology upgrades**.
6. MOT's engagement in these issues will not only support visitors' needs, but also provide **new services and improved quality of life for residents**.

Figure 21 – Overtourism Perceptions

With which of the following statements do you agree most?

Source: Maine Destination Management Resident Study Report



- Stakeholders believe the state has a lot to offer, but believe many people are unaware of the variety of options and alternatives.
- Stakeholders would like to see marketing activity with a greater focus on dispersing visitors to lesser-known destinations, supporting off-peak seasonality, and in support of a broader range of attractions and offerings.
- 49% of residents and 60% of visitors report that it “feels as if there are too many visitors in my area of Maine” occasionally, with 23% of residents and 10% of visitors reporting that it occurs often or always.

3. Stakeholders identified a need to achieve greater balance in visitation—across geographic locations and seasonality, as well as diversified experiences and product offering—to ensure all of Maine’s residents and communities benefit from tourism.

Implications

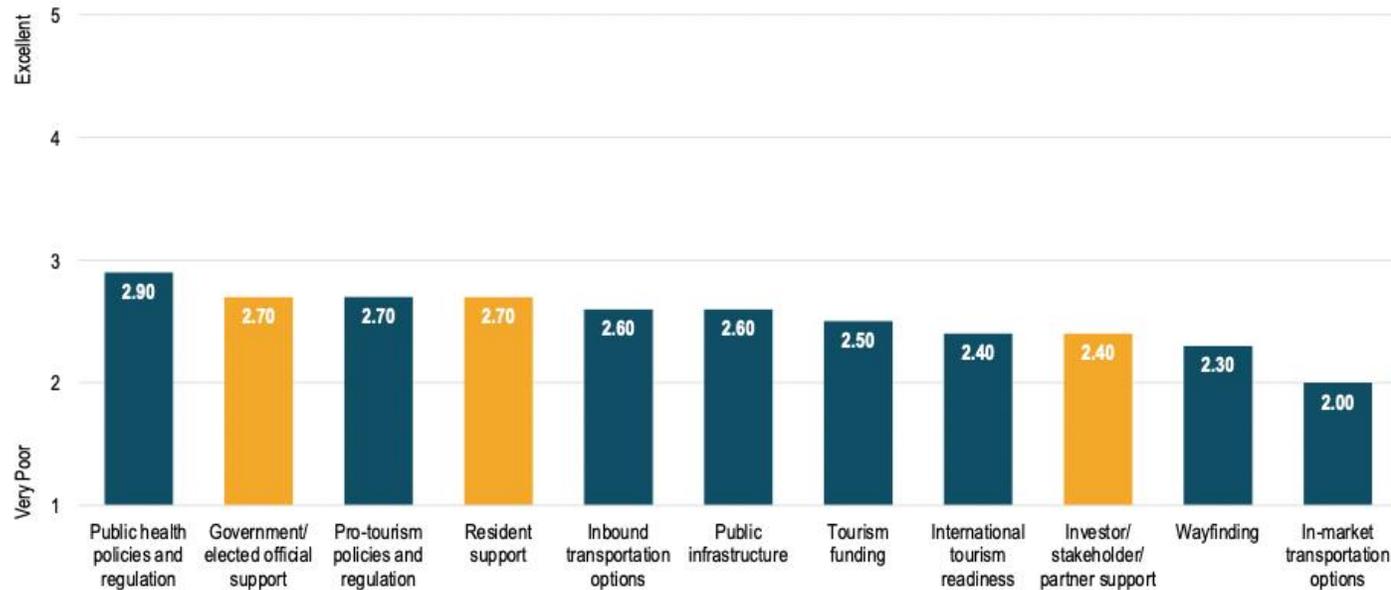
1. MOT can play a lead role in **increasing awareness** of and access to opportunities to experience the **richness and diversity of tourism experiences** of Maine at off-peak times and available in lesser-known and less frequented communities across the state.
2. MOT may provide a leading role in identifying new market opportunities that support visitor growth in **emerging regions** and during off-peak times.
3. Responsible destination management may require an **investment in smart technologies and platforms** to enable visitor management, dispersal strategies, in-market resources, access to **just-in-time destination information**, and other approaches.
4. Different regional needs require different approaches, even within the context of an overarching state plan. MOT can continue to collaborate with regions to develop **regional planning to meet the needs of specific communities**.

Implications 1-3

- Working with the department of transportation for bikers/bicycle trails
- Working waterfront access – access for recreation
- Improved infrastructure has to come with a better perception of tourism in general; all beneficial and creating a position feeling toward tourism; tourism is a vehicle to get better infrastructure for quality of life
- Dispersal of tourists – coming up with new ways to do this
- Not much mention of workforce development, housing, or childcare – need strategy to train the workforce or disperse the workforce
- Attitude toward tourism due to congestion
- Funding; coming up with a better tax structure
- Preserving unique cultural heritage – having people who know the culture of the community or locals being able to live, work, and stay in Maine
- Micro-level; smaller, local community impacts
- Public transportation; potential for increasing lengths of stays for cruise ships
- Educate stakeholders on how to have programs that will be sustainable or regenerative
- Excite people about what Maine has to offer; fun and exciting sustainable programs
- Getting DOT involved – need for transportation for tourists and employees so they can take the jobs that are available
- Messaging at visitor centers
- Desk that focuses on cultural events
- “Preserve, protect, inspire”
- Maine - unique access to private lands ; messaging on being a responsible user. New owners and the implications that come with that. Working at community level
- Infrastructure required to disperse people to different parts of state
- Outdoors is a driver but not self-sustaining; not just “roads to the outdoors” but trails within, etc.
- Not every place in Maine is visitor-ready; supporting different destinations and helping them figure out what people do when they get there
- Use marketing to getting people to different parts of the state
- Diversify who we are marketing to
- Identify different parts of state as “springboard locations”
- Charging station development
- Finding replacements for jobs as people retire, leave, etc.

Figure 24 – Tourism Supports N=298

Please rate your perception of the quality of the tourism support structures in Maine:



- Stakeholders feel that a low level of collaboration within the destination is a top challenge, calling for greater partnership and cross-functional engagement to tackle major initiatives.
- Industry support from the government and between stakeholders received low ratings.
- Stakeholders would like to see MOT provide more best practices and coordinate greater engagement across the industry.

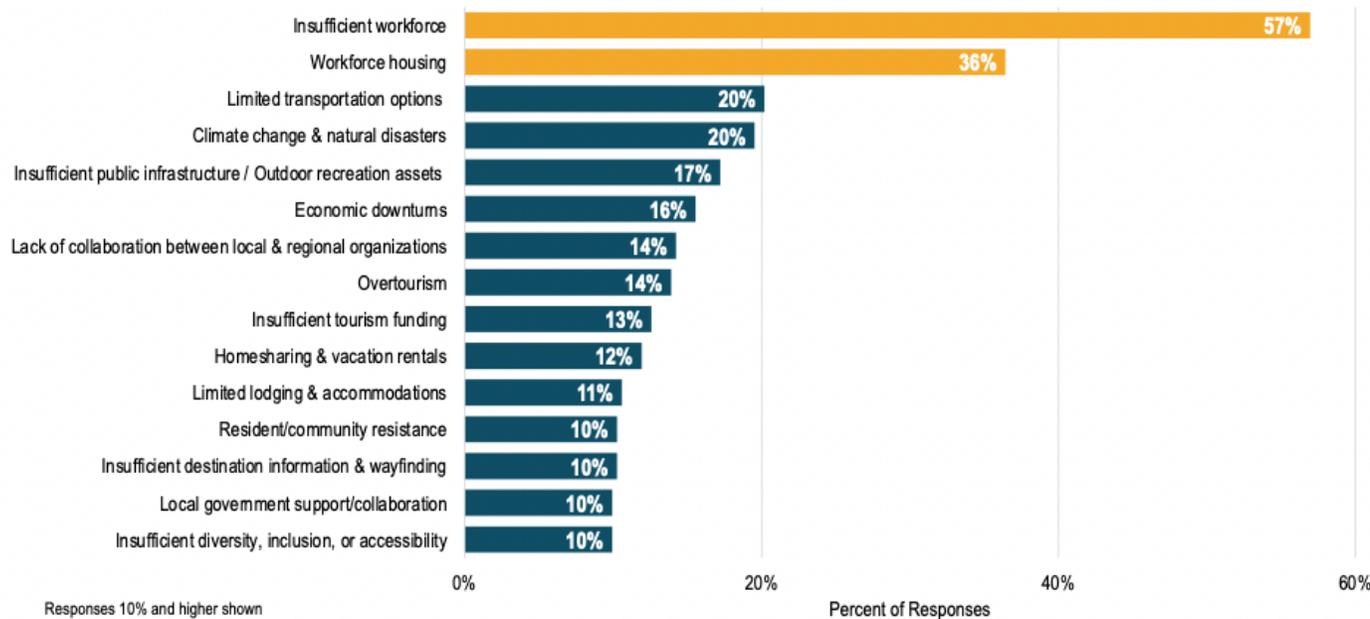
4. Stakeholders desire greater engagement, collaboration, and sharing of both resources and knowledge among and across state agencies, regions, communities, organizations, and other government entities in order to improve efficiency, ensure sustainability, and increase competitiveness.

Implications

1. Different regions and destinations across the state utilize strategic resources inconsistently, which can have **detrimental effects** on visitor experience and perception of Maine as a destination.
2. Building capacity and skills for **effective collaboration** is foundational to a long-term strategy. MOT may take the key role of building the capacity of the tourism industry across the state to support a **stronger, more effective, more resilient tourism industry**.
3. MOT is in a position to **lead the industry** in greater stewardship of available resources. They can incentivize industry collaboration for greater efficiency, impact, and cohesion of visitor experience from destination to destination, regardless of perceived boundaries or jurisdictions.
4. It is of critical importance to **improve Maine residents' awareness and understanding of the positive impacts of tourism**, while also providing opportunities for greater resident and community engagement in tourism development. This would help ensure its impacts remain **positive, viable, sustainable, and in balance with local communities, culture and values in the future**.

Figure 27 –Top Challenges N=302

Aside from COVID-19 what do you believe are the top challenges facing Maine as a destination?



- Insufficient workforce and workforce housing are the top two challenges for the destination.
- Workforce development is a top opportunity.
- Stakeholders believe creating workforce development programs or initiatives is the top strategy to best help in the recovery of Maine’s tourism industry.

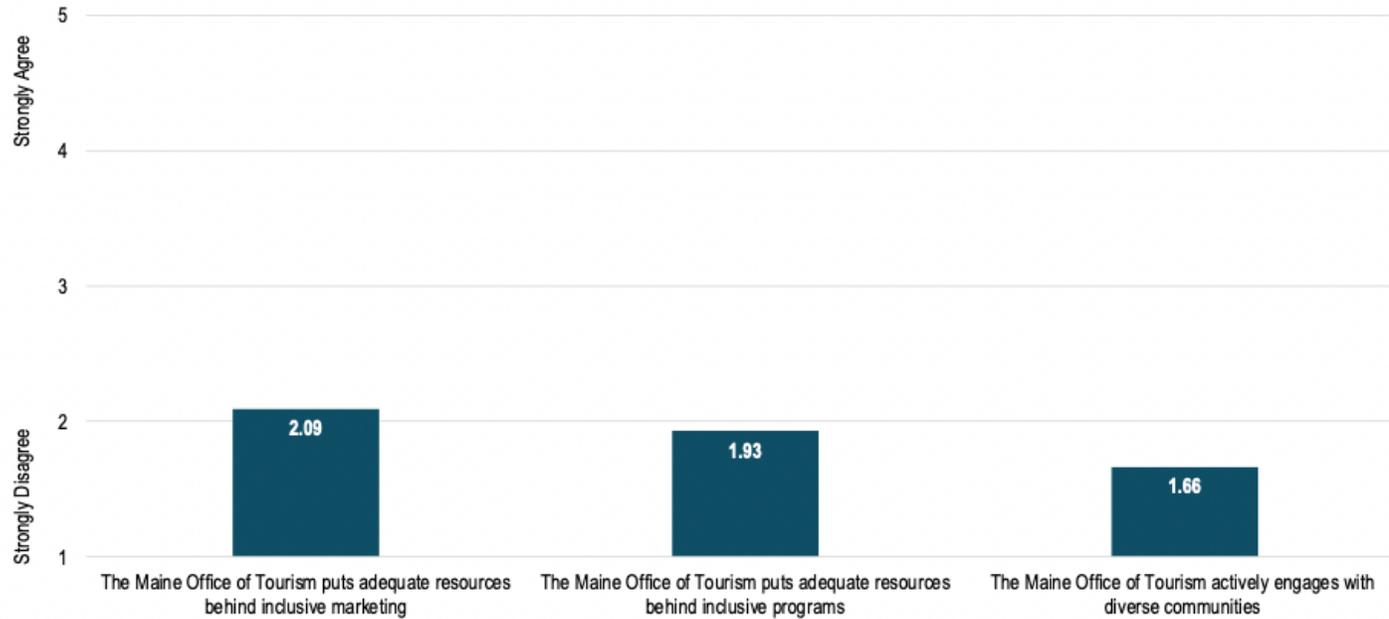
5. The future viability of Maine’s tourism economy is dependent on engagement and collaboration with key public, private and government partners to resolve significant industry workforce challenges.

Implications

1. While workforce development and programs are outside of MOT's direct control, the tourism office has a unique opportunity to leverage its position of influence and connection to **convene, prioritize, and advance strategic initiatives in the context of the industry's role as a key economic driver**. Partnering to address workforce issues such as housing, transportation, livable wages and other concerns will have a **positive impact** on industry-related workforce shortages and support issues over the long term.
2. **Responsible growth** will not be viable unless workforce issues are met. One of the benefits of tourism development is its ability to deliver **jobs and careers**. MOT will need to carefully consider the role it can play in influencing how this issue is addressed.
3. Tourism is an **important source of jobs** in Maine. It is critical to ensure that tourism provides not only entry level and gig opportunities, but also **career pathways** for the industry to be recognized as a driver of **increased quality of life in Maine**.
4. MOT can play a key role in promoting positive messaging and implementing strategies to highlight the many **rewards and opportunities** associated with choosing a career in the hospitality industry. Advancing these messages will help to ensure a skilled and enduring workforce for the future.
5. Maine's brand as a destination may be negatively impacted unless workforce-related matters are addressed.

Figure 30 – Commitment to DEI N=419

Please indicate your level of agreement with the following statements:



- Maine is not seen as a diverse destination.
- Stakeholders believe MOT needs to do more to market to more diverse populations and put resources behind inclusive programs.
- “Inclusive” is a top word used to describe the desired reputation of MOT in the future.
- Lack of resident diversity is a top challenge for the destination.

6. Stakeholders identified a need for greater focus on more inclusive and equitable representation to advance the position of Maine as welcoming to all.

Implications

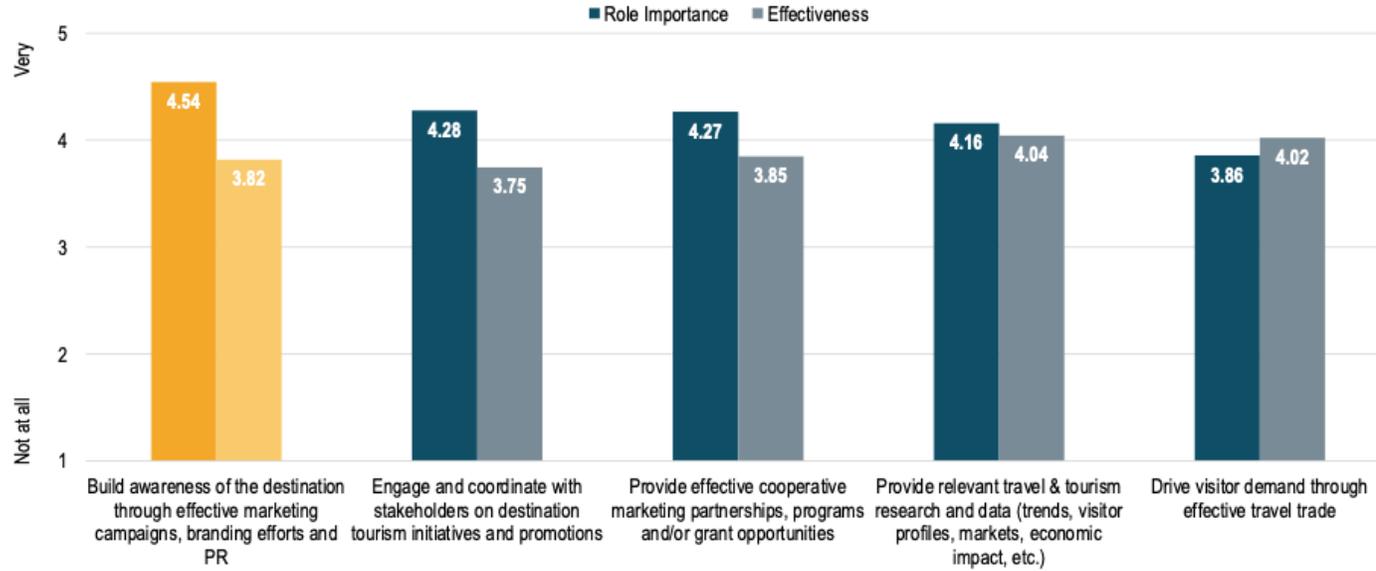
1. A focus on **improving inclusiveness** and the feeling of being **welcomed**, particularly among **diverse populations**, may help draw younger, more **diverse visitors**, many of whom value **diversity and inclusion** in their travel choices.
2. MOT has an opportunity to highlight its **indigenous heritage and history**, diverse artists and makers, unique community culture, and accessible assets and attractions to **increase awareness** of a more inclusive and varied visitor experience more intentionally.
3. MOT has the opportunity to incorporate diversity and inclusion in its marketing and product development activity, creating new experiences for visitors
4. MOT can help the industry to further its **collective diversity, equity, and inclusion** journey by facilitating greater access to relevant education and resources.

Implications 4-6

- Running in silos – separated because of covid
- More communication and collaboration
- Focusing of locals but also welcoming to anyone who wants to come to maine
- Loss of state planning office
- Opportunities to bring people together
- Engaging land owners
- Workforce

Figure 33 – Marketing Roles N=285

Please rank how important the following destination marketing roles are to you and the success of Maine as a destination, and how effective the Maine Office of Tourism is at these roles:



- Stakeholders believe marketing is a critical role for MOT and the success of Maine as a destination and would like to see MOT put more efforts into marketing and brand development.
- Stakeholders believe that increased marketing is a top opportunity for Maine as a destination.
- Stakeholders rated destination information as an area that could be improved. Many believe that opportunities exist to create a uniquely Maine visitor experience through curated itineraries; accurate information on lodging, dining and local off-the-beaten-path experiences; and local tradespeople and artisans.
- Many stakeholders believe that increased awareness, connection, and utilization of Maine’s unique and local experiences will set the destination apart from other places.

7. Opportunities exist to advance marketing and branding efforts that simultaneously highlight the authentic Maine experience and coordinate strategic product development throughout the state.

Implications

1. MOT can utilize its branding and marketing expertise to highlight experiences that **align with sustainable development of tourism**. Through a continued commitment to **building brand awareness of Maine's lesser-known natural locations and cultural heritage**, MOT can align its marketing activities with stewardship goals.
2. **Improving destination information** will not only improve the visitor experience by providing visitors information about unique products and experiences, it will also **reduce stress** on overburdened tourism assets as visitors seek out previously unknown experiences.
3. MOT should (continue) to align its destination development activities and marketing activities with destination stewardship goals.

Implications

1. MOT will need to align marketing and destination development goals to achieve sustainability/quality of life goals.
2. MOT has an opportunity to **further empower the industry**, building and supporting platforms for industry to leverage MOT knowledge and programs such as brand engagement, development plans, strategic principles, etc.
3. MOT may consider **leading the capacity building, training, and team building efforts** to assist the industry in addressing challenges strategically.
4. MOT has an opportunity to **build its capabilities** in industry engagement and collaboration as a foundational “way of doing business.” It is unlikely that MOT can meet the wide array of challenges facing the destination alone and will need to develop strong partnerships to ensure success.
5. MOT may need to **reassess its organization structure, skills and capabilities** to ensure the organization is set up to take on destination management and stewardship roles.

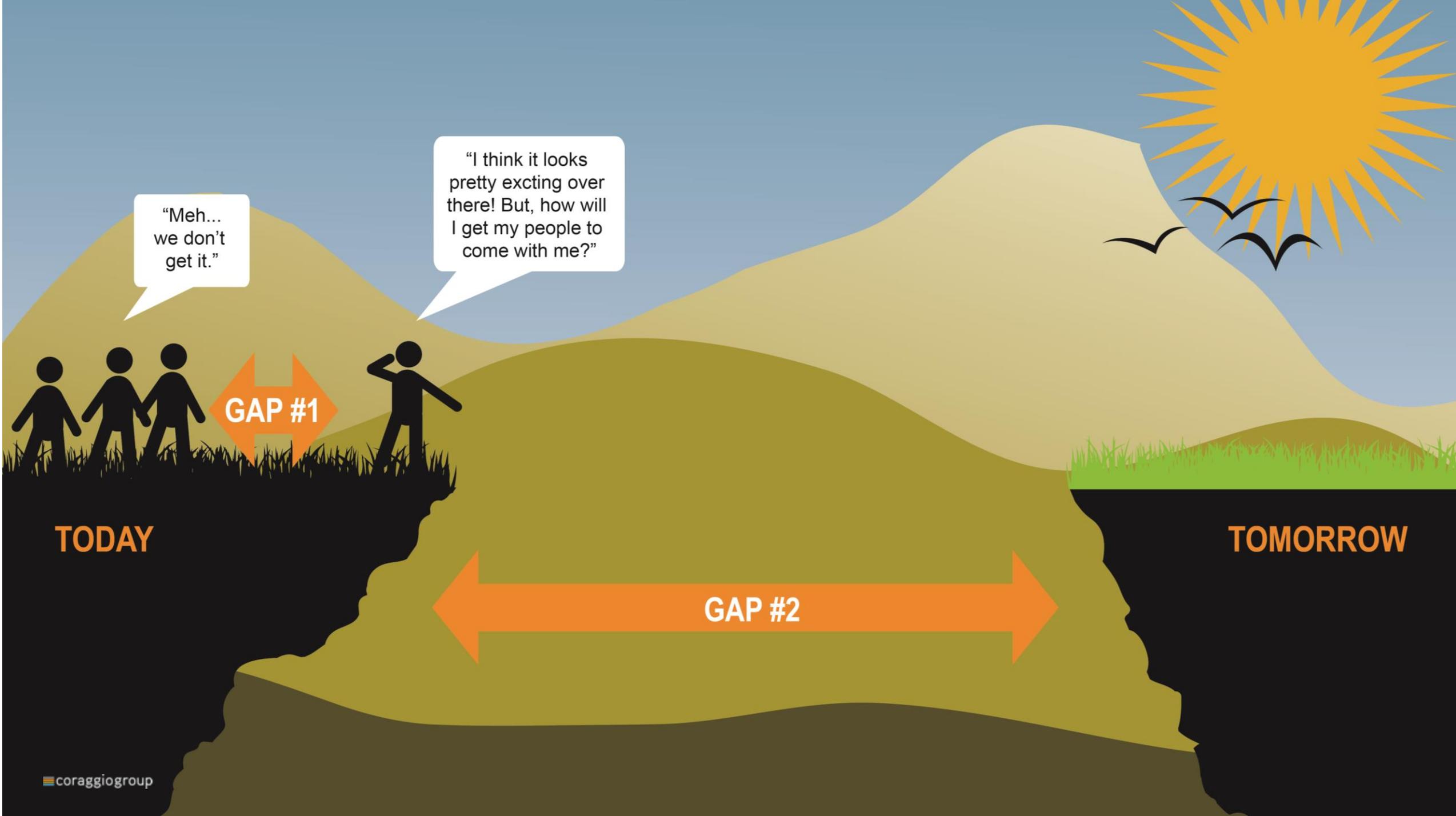
Implications 7-8

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Vision

Aspirational, Bold, Inspiring



“Meh... we don't get it.”

“I think it looks pretty exciting over there! But, how will I get my people to come with me?”

GAP #1

GAP #2

TODAY

TOMORROW



Imagining Success

Homework



Portland Press Herald

June 16, 2027

Headline here

Lead paragraph here

Imagine it's June 16, 2027 (five years from now). The Portland Press Herald would like to interview you for a story on the state of Maine's tourism industry.

They want to know:

- How is the industry is faring five years after the pandemic?
- Are there any exciting new developments?
- Who has been involved in the industry's growth?
- What can other states learn from Maine?

What is the story you'll tell?

Instructions

- Write the headline.
- Write the lead paragraph (2-3 sentence opening paragraph).
- **Email your headline and lead paragraph to ninwa@coraggiogroup.com by noon on June 21**
- Get creative and have fun with this!

Next Steps

Planning Sessions

Session #1: Situation Assessment Share-Out & Grounding – *June*

Session #2: Vision, Mission, & Stewardship Principles – *June*

Session #3: Values, Reputation, & Position – *July*

Session #4: Strategic Imperatives & Objectives – *July*

Session #5 & #6: Strategic Initiatives – *September*

Session #7: Priorities & Phasing – *September*



Thank you!