



**MAINE'S 10-YEAR OUTDOOR  
RECREATION ECONOMY ROADMAP**

# TRAILBLAZER

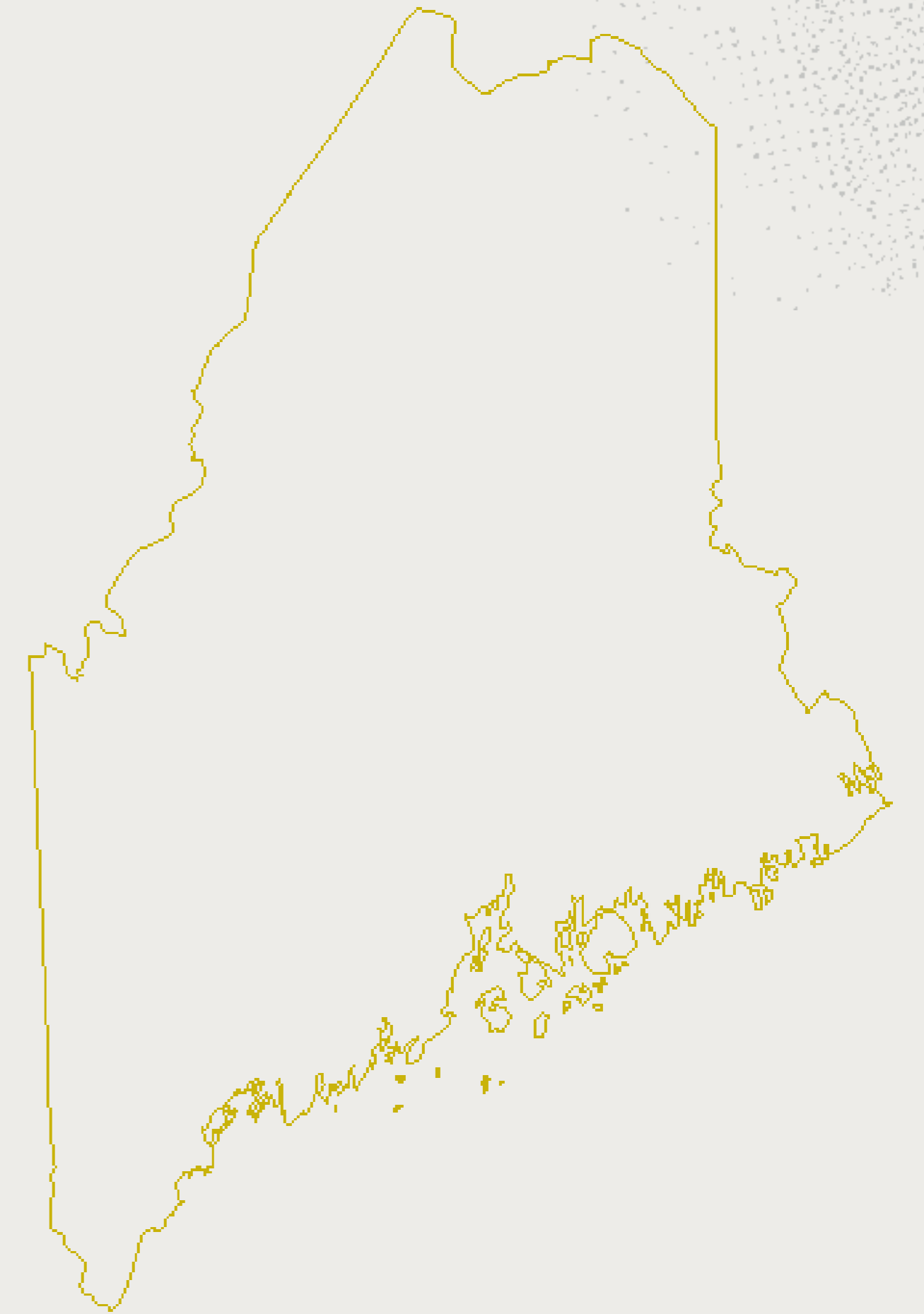
**MAINE'S 10-YEAR OUTDOOR RECREATION ECONOMY ROADMAP**

<https://www.trailblazerroadmap.com>

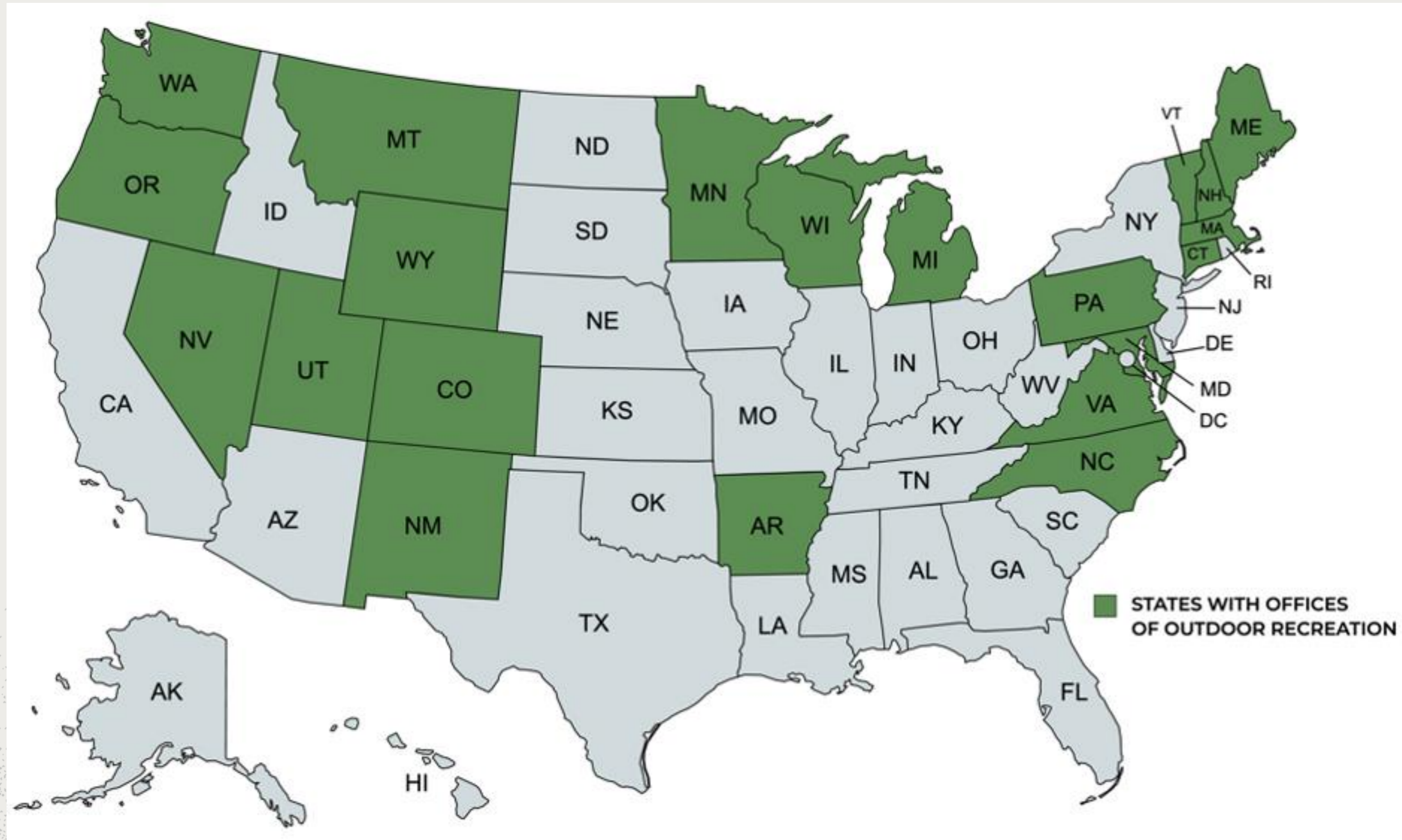


# AGENDA

- OREC Background
- Overall process and timeline
- Data next steps
- MOES reflection and engagement summary
- Build session topics and save the dates



# OREC MOVEMENT



- 2010 – Utah creates 1<sup>st</sup> office.
- 2018 - Maine creates the 10<sup>th</sup> office.
- 2023 – MA launches the 20<sup>th</sup> office.
- 2024 – CT announces the 21<sup>st</sup> office.

# WHY THE ROADMAP

As the landscape becomes increasingly competitive, the industry recognized the need for a collaborative effort to guide key stakeholders to strategically envision, plan for, and propel the next ten years of Maine's \$3B+ outdoor recreation economy.



# STEERING COMMITTEE

Adventure Travel Trade Association  
Bicycle Coalition of Maine  
Dirigo Labs/Central Maine Area Growth Council  
Eastern Maine Development Corp  
Flowfold  
Four Directions (invited)  
Friends of Acadia/Bar Harbor Chamber  
Irving Woodlands/North Maine Woods  
L.L.Bean  
Lyman-Morse Boatbuilding and Marina  
Main Street Skowhegan  
Maine Association of New Americans  
Maine Community College System

Maine Coast Heritage Trust/Land Trust Network  
Maine Outdoor Brands  
Maine Professional Guides Association  
Maine State Chamber  
Maine Trails Coalition  
Nature Based Education Consortium / Outdoor  
Equity Fund  
New England Outdoor Center  
Ski Maine  
UMaine Orono (student)  
UMaine System

# GOALS OF THE ROADMAP PROCESS



Provide a current analysis of the economic value of the outdoor economy to the State of Maine



Define and increase awareness of the different sectors that make up Maine's outdoor recreation economy.

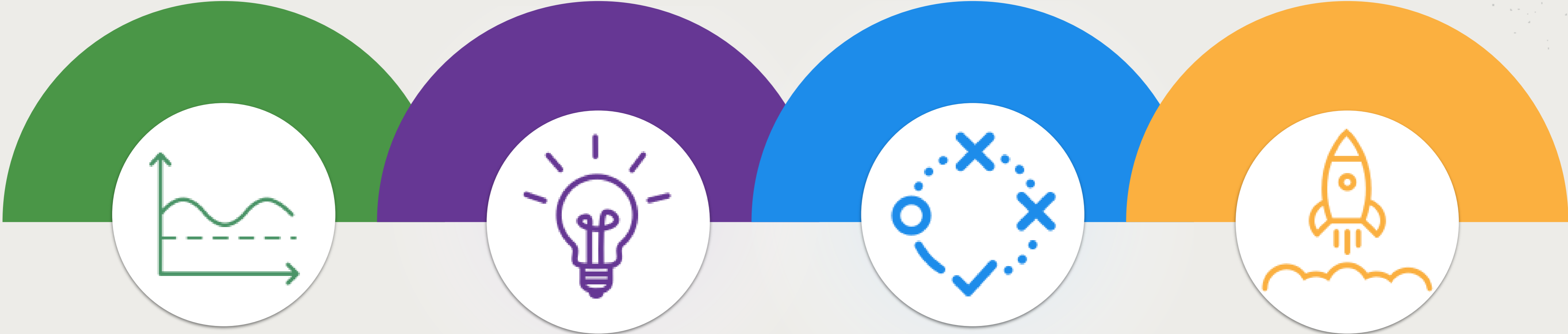


Identify key strategies and investment needed to fuel the growth of the outdoor economy state-wide for the next 10 years



Form partnerships and collaborations necessary to secure additional investment to implement the strategies identified

# ROADMAP PLANNING PROCESS



## ESTABLISHING A BASELINE

- Analyze & interpret data
- Review prior plans
- Develop comms strategy

## CREATING A VISION

- Engage community leaders
- Gather & evaluate community input
- Determine sector priorities

## DEFINING GOALS & STRATEGIES

- Facilitate Build Sessions
- Create strategic recommendations, actions, resources

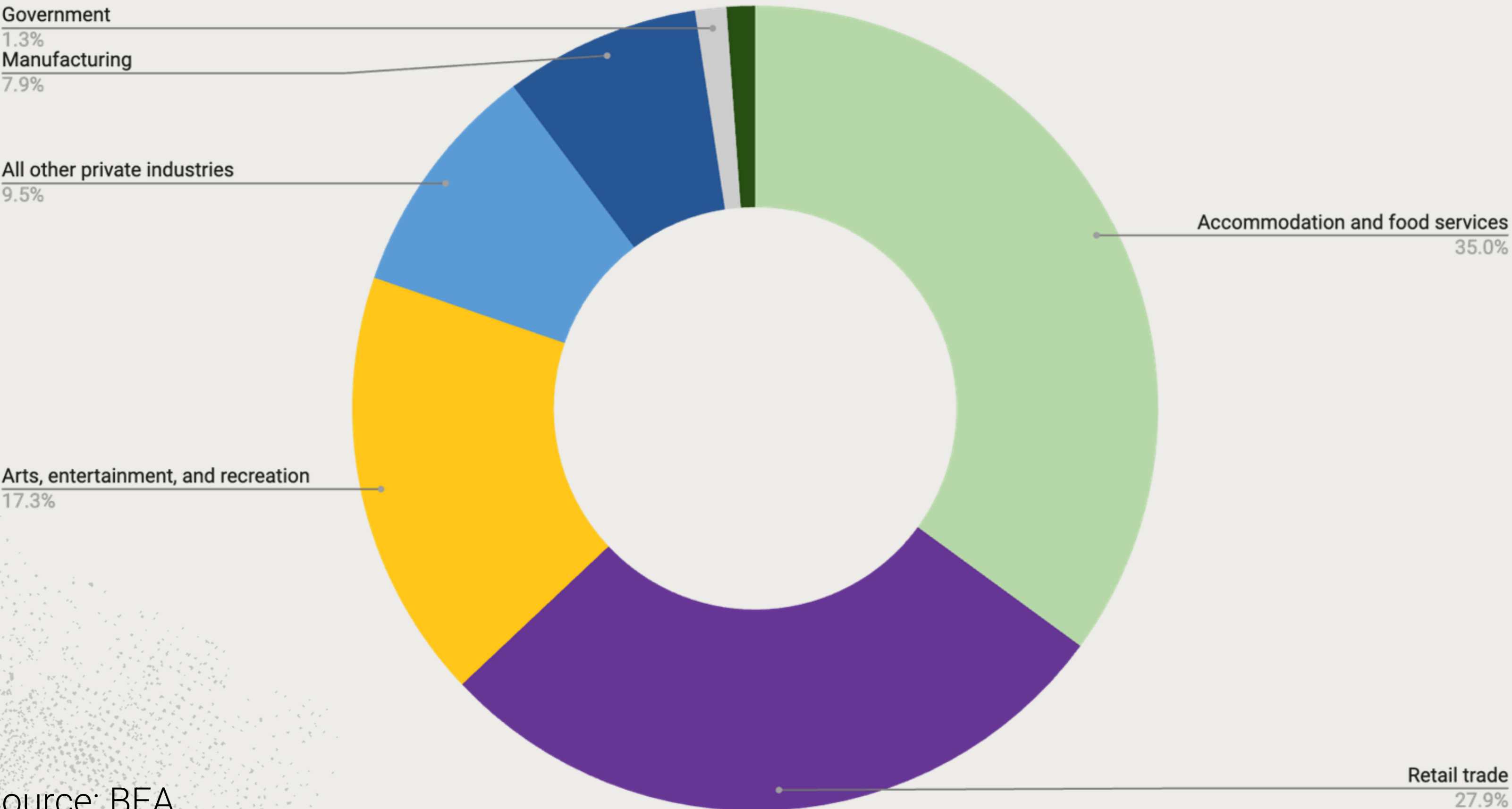
## MOVING TO ACTION

- Engage implementation champions
- Define metrics & impacts
- Develop, design, and launch final plan

# ROADMAP DATA ANALYSIS TO DATE

## Industry and Workforce Scan

**Maine Outdoor Recreation Employment 2022**



Source: BEA

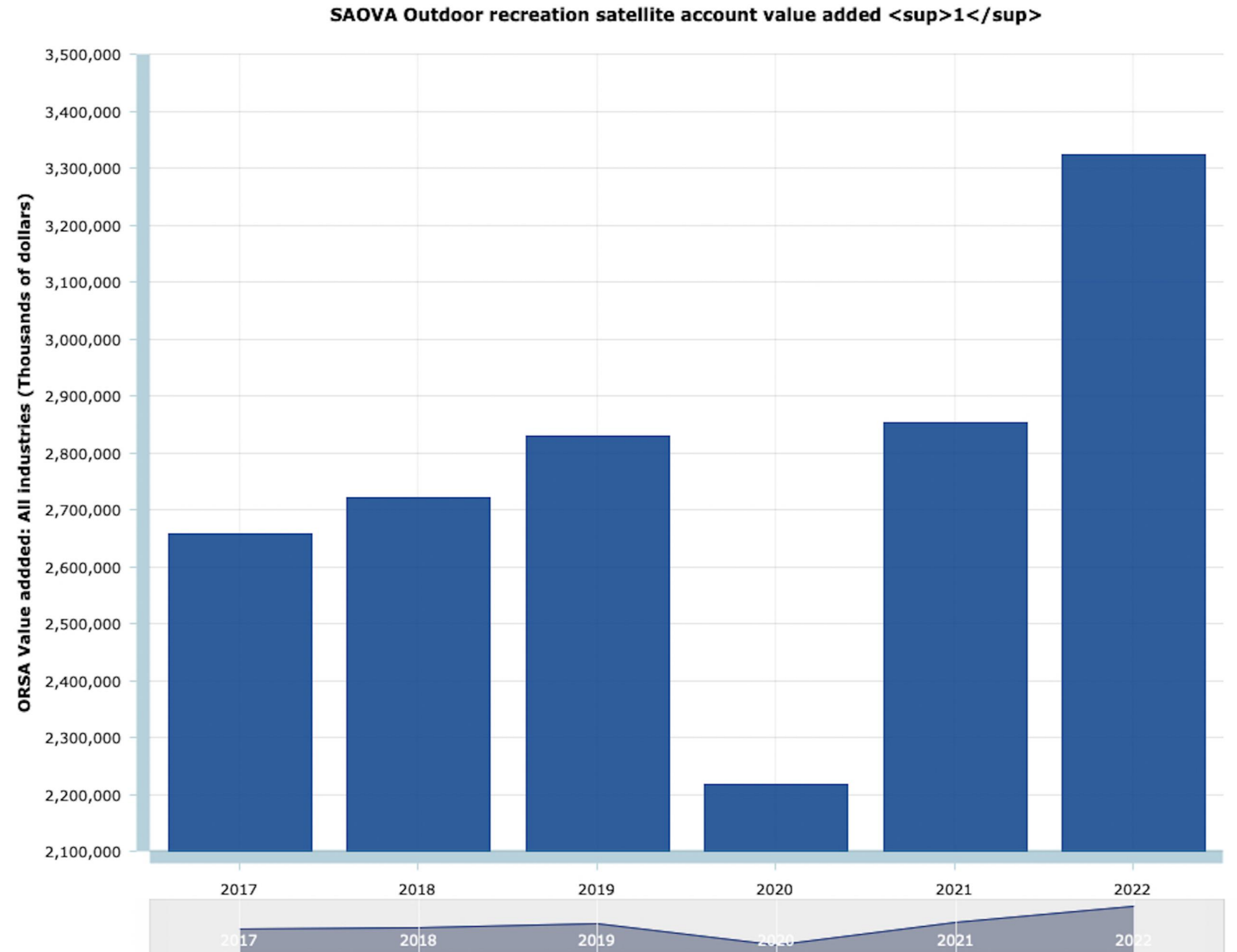
Maine’s outdoor economy grew **16.5%** from 2021 to 2022.

Outdoor recreation made up **3.9%** of **Maine’s economy** in 2022, the sixth largest share in the nation.

As of 2022, **32,000 people were employed** in the outdoor economy in Maine.



# MAINE'S GROWTH

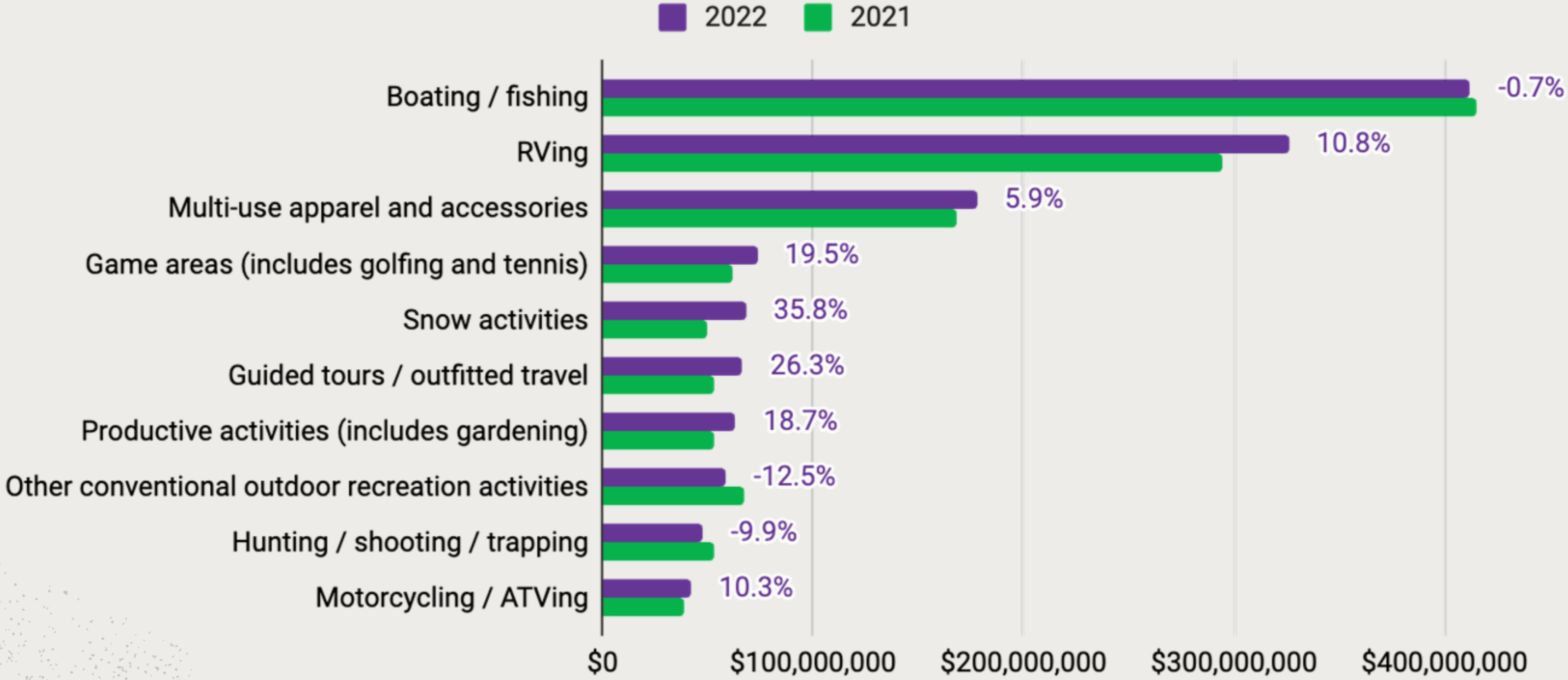


Source: U.S. Bureau of Economic Analysis

■ Maine

# ROADMAP DATA ANALYSIS TO DATE

## Top Outdoor Activity Value Add in Maine 2021-2022



Boating, the state's top outdoor economic driver, consists of goods and services such as boating lessons, boat sales, marina services, motors, insurance, and more.

Source: BEA

Value Added to Economy

# ROADMAP DATA ANALYSIS TO DATE

## Industry and Workforce Scan

### Still to come:

- Baseline Industry Analysis – University of Maine
- Workforce Trends – Fourth Economy
- Supply Chain Analysis – Fourth Economy
- Outdoor Assets and Conditions – Maine Bureau of Parks and Lands
- Participation and Use Data – Maine Bureau of Parks and Lands



# COMMUNITY ENGAGEMENT

- MOES
- Interviews
- Focus Groups
- Build Sessions  
(February 26-29)
- April Roadshow  
across the state
- Plan Ambassadors &  
Community Stipends



# MOES ENGAGEMENT SUMMARY

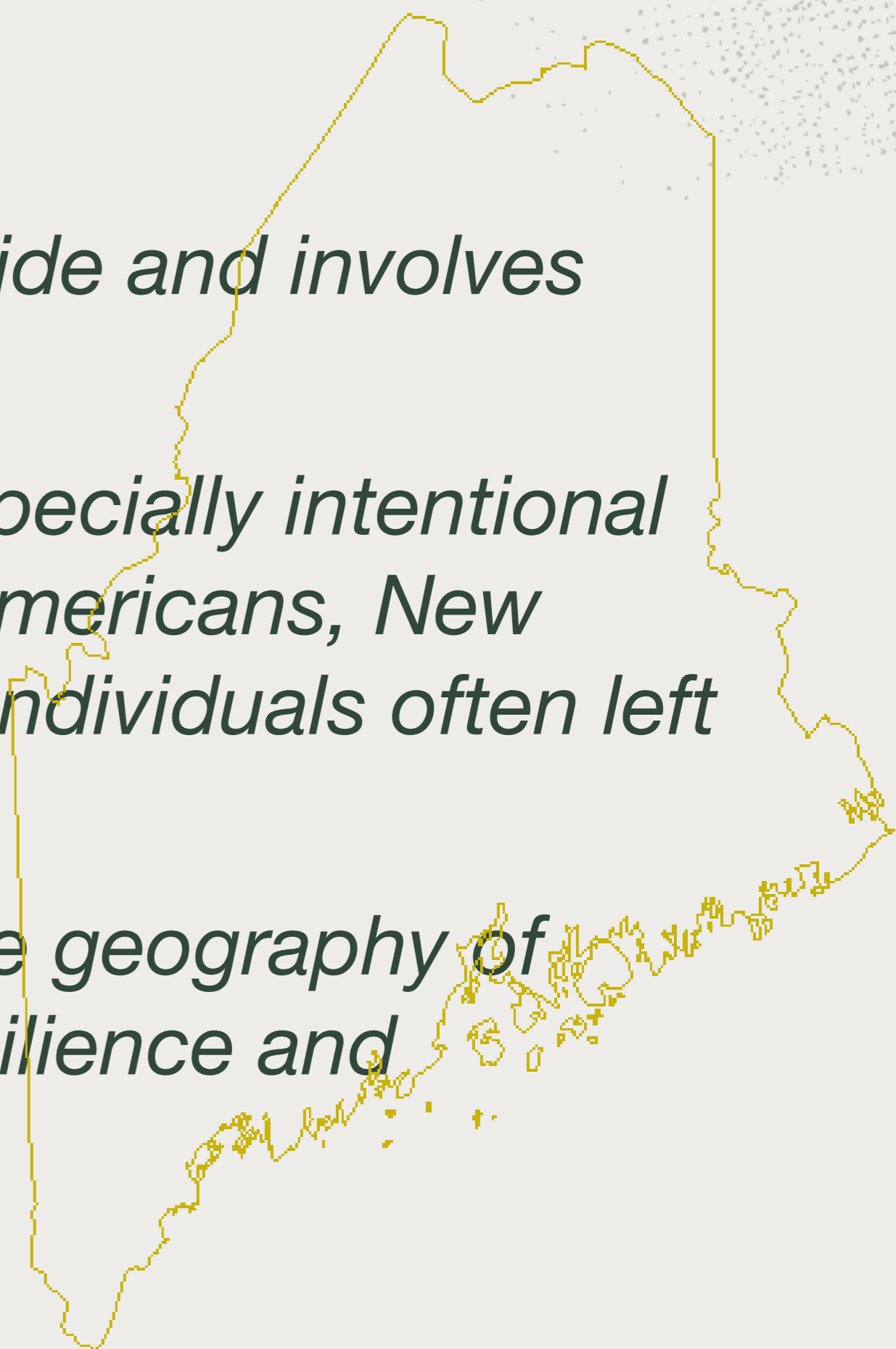
- **18 interviews conducted** with selected participants to glean their perspective on the assets, challenges, and potential of Maine's outdoor recreation economy
- **20 respondents to a short survey** asking for input to define the outdoor recreation economy
- **130 attendees at the Roadmap launch** and visioning session
- **110 attendees** at the Roadmap talent and career pathways brainstorming session
- **4000 post it notes** used for brainstorming



# MOES ENGAGEMENT SUMMARY

## What we learned:

- **What is the outdoor economy?** *“At its core it’s being active outside and involves some connection to place.”*
- **Who should the Roadmap benefit?** *“Everyone, but should be especially intentional about including rural communities, children and youth, Native Americans, New Americans, people of color, women, LBGTQ+ and low-income individuals often left out of the outdoor economy.”*
- **What are the sector’s strengths?** *“The natural beauty and diverse geography of Maine - coastline, mountains, lakes, rivers, highlands, etc... Resilience and Sustainability... The Maine brand.”*



# MOES ENGAGEMENT SUMMARY

## What we learned:

- **What are the sector's main challenges?**
  - Balancing economic opportunity with environmental stewardship
  - Creating a culture of inclusivity: "it's easy to feel like you don't belong"
  - Many outdoor recreation activities are expensive and hard to get to
  - Affordable and workforce housing, especially for seasonal workers
  - Livable wages for outdoor economy workforce
  - Support for small outdoor economy businesses to help them stay afloat
  - Climate resilience/preparing for climate change
  - There are many strong relationships within regions but not always connected between the regions.



# BUILD SESSION TOPICS

- **Outdoor Recreation  
Participants – Inbound &  
Local**  
*February 26 12:30-2pm*
- **Sustainability and Climate  
Change**  
*February 27 10:30-12pm*
- **Land Use, Water Use,  
Natural Resources**  
*February 28 10-11:30*

## ***SAVE THE DATE:***

- **Outdoor Recreation  
Supporting- Infrastructure**  
*February 28 12:30-2pm*
- **Outdoor Industry  
Workforce**  
*February 29 10-11:30am*
- **Economic Development**  
*February 29 12:30-2pm*



# TIMELINE

## Roadmap Planning Launch

Review prior plans; Develop branding & communications strategy; Begin community engagement

## Strategy Development

Create and refine strategic recommendations; Circulate for community input; Document resources (financial, partner, capacity)



**Save the date!**

**NOVEMBER 13-15, 2024**

**MAINE  
OUTDOOR  
ECONOMY SUMMIT**

**at the**

**SUNDAY RIVER RESORT**



OFFICE OF  
OUTDOOR  
RECREATION

**MAINE**  
OUTDOOR BRANDS



**Sunday River.**