

THE MAINE THING



Driving a shared vision
FOR TOURISM.

MAINE OFFICE OF TOURISM
Five-Year Strategic Plan
2014-2019



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WHO WE ARE *and* MISSION.

The Maine Office of Tourism, an office within the Maine Department of Economic & Community Development, is charged with administering a program to support and expand the tourism industry and promote the state as a tourism destination. The MOT develops and executes effective marketing programs for the benefit of the travel and film industries, and the economy and the citizens of Maine, by protecting and creating jobs through attracting visitors to the state.

MISSION

Become the premier four-season destination in New England.

EXECUTIVE SUMMARY.

“First comes thought; then organization of that thought, into ideas and plans; then transformation of those plans into reality. The beginning, as you will observe, is in your imagination.”

— Napoleon Hill

Maine fosters a special connection with just about everyone fortunate enough to experience its pristine waters, unspoiled coastline, abundant wildlife, wide-open vistas and majestic mountains. Even for those who haven’t yet experienced our state, Maine has an allure all its own. Maine’s tourism cachet often reflects its residents—those of us lucky enough to call Maine home—who not only feel this sense of place, but embody its spirit born of earth, air and sea. A spirit of self-reliance, pragmatism and understated values that embraces the authentic, original, quirky and quaint—and follows its own inner compass.

We are proud of our state and its reputation as a “bucket-list” destination. And we attribute our year-over-year appeal to the sense of loyalty that underlies high levels of repeat visitation after just one trip to Maine. But things are changing fast. Not just trends, technologies and fashions [within and outside the tourism industry], but the very fabric of how people interact and manage their lives. Some of this has been brought about by the impact of our national economy on people’s personal economies, but unprecedented changes are also taking place in our political landscape, social structures and even weather patterns. This is reflected and amplified in today’s “WOW-worthy” amazing finds [take your pick—food, craft beer, trails, beaches, one-of-a-kind, off-the-charts experiences] that are shared immediately and multiplied as photos, blog posts, video clips, tweets, reviews and GPS coordinates that are posted in real time.

All of this has forever changed, and will continue to shape, how people think about the world, what we value and how we make choices about where and how to spend our time, energy, attention and money. For the tourism industry, the message is clear—like it or not, the consumer must be at the center of everything we do and we must not underestimate the power of individuals to wield incredible influence at every step in their travel experience—from dreaming, researching, planning, booking, experiencing and recommending, to reminiscing. For today’s consumer, travel is a big deal. In a perfect world, authentic and adventurous travel creates new connections and new friends, it refreshes existing relationships, and it sets the groundwork for personal transformation. Yes, all that from a single trip.

The good news, for travel and tourism professionals, is that the “perfect world” feels a lot like Maine. In fact, according to the U.S. Travel Association’s recent FutureView Research, what “Future Influencers” and “Future Shapers” want aligns to the very essence and nature of Maine’s travel experience:

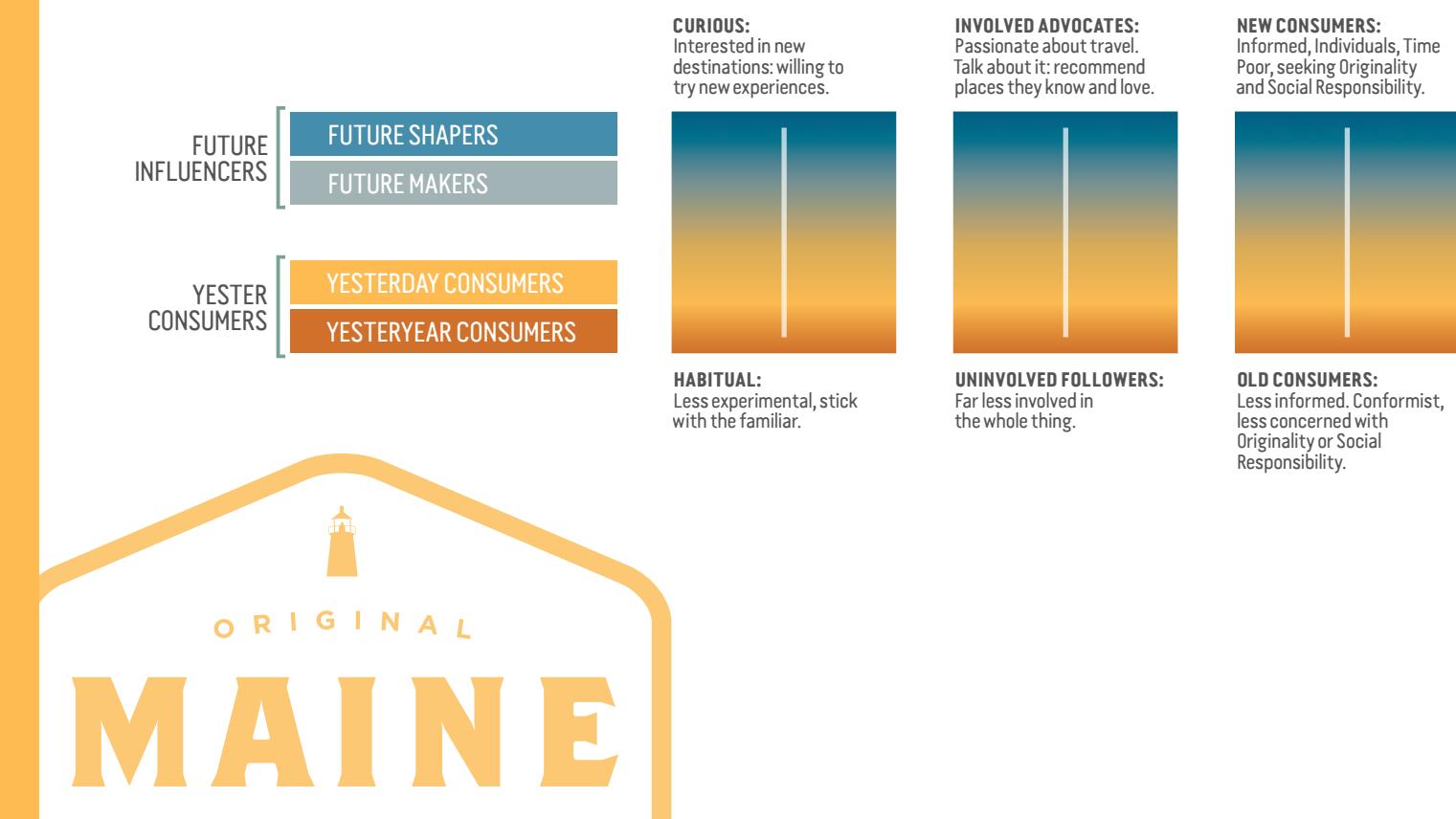
- They value authenticity and originality [the exact values the Maine tourism brand is positioned upon]
- They are individualistic—doing things “my way” [aka “follow your own inner compass”]
- They are curious, open-minded and receptive to new ideas [find your own “Maine Thing”]



FUTUREVIEW™ CATEGORIES

TNS FutureView™ is a market research tool that identifies “Future Influencers,” those leading-edge consumers who quickly adopt a new product and influence others to do the same. Marketers need to target their new product communications to this group because they have such an influential role in bringing new products into the mainstream. Future Influencers, especially Future Shapers, are defined by seven characteristics.

- They value authenticity and originality in all they buy and experience.
- They are well informed and hugely involved in the products, services and brands they buy.
- They are individualistic, doing things “my way” and increasingly demanding that companies do too.
- They are limited on time and value anything that saves them time.
- They are socially responsible and exercise their ethical awareness via their product and brand choices.
- They are curious, open-minded and receptive to new ideas.
- They are advocates of new ideas and they spread the word.

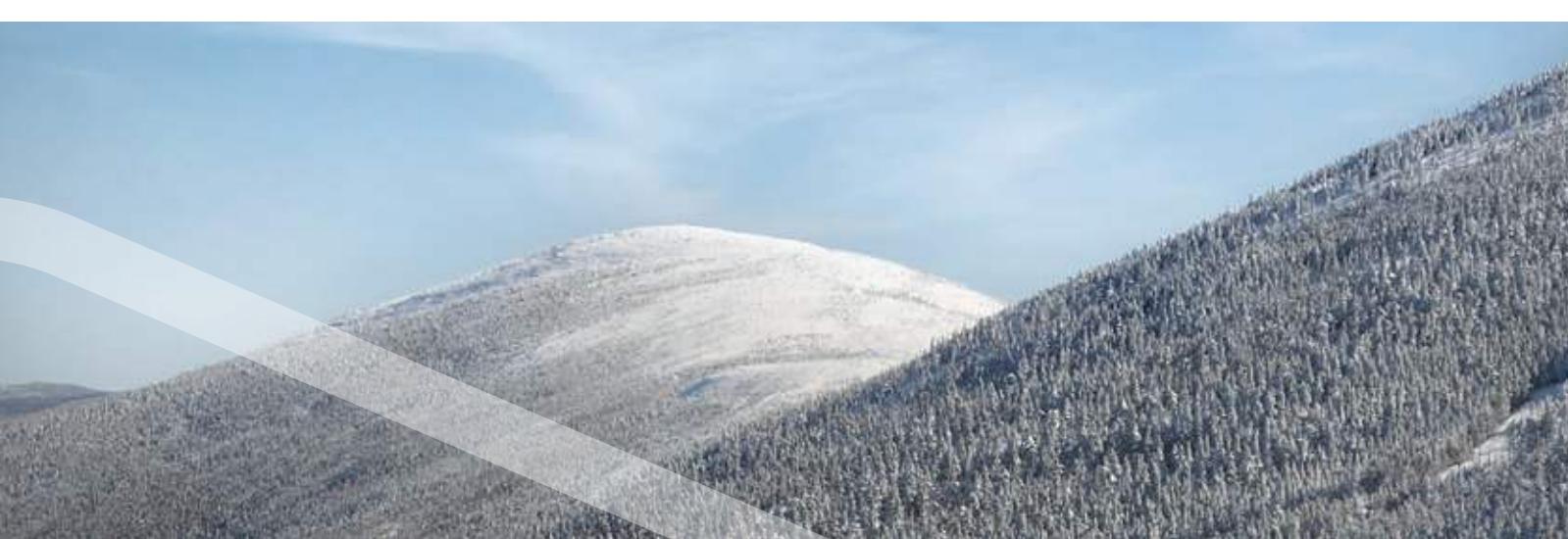


PURPOSE.

The purpose of this Strategic Plan is to create a roadmap to guide Maine's long-term tourism strategy and to strengthen shared statewide support for driving the economic and social importance of this industry. It is a blueprint for action—a path to follow, offering ways to add value to the Maine experience for visitors and residents alike ... both economic and social value. While the Maine Office of Tourism [MOT] has a strong commitment to a multitude of initiatives and programs that further this overarching goal, this Plan aims to bring clearer focus to the long-term barriers, equities and opportunities for growth that sometimes are lost in the sea of day-to-day activities. As such, it sets a bold vision and strategy for Maine's tourism growth through 2019, building upon past efforts, capitalizing on Maine's inherent equities and continuing to leverage collective industry and statewide efforts. Specifically, it ...

- Serves as a blueprint for a strategic, integrated approach to tourism and recreation development and marketing in Maine
- Positions Maine to capitalize on changing consumer needs and buying trends
- Confirms priorities to focus and expand resources
- Utilizes promotion efforts, products and partnerships
- Identifies recommended strategies and initiatives
- Assigns metrics to measure progress and results

The implementation of this Plan will need to be flexible to achieve the recommendations and goals outlined for the Maine tourism industry. The Plan itself will need to be reviewed and updated on a regular basis and change as the environment of the industry changes—not only within Maine, but also changes that will come regionally, nationally and globally. The industry will need to stay engaged over the life of this Plan and commit to seeing that the recommendations are considered and that proper resources and investments are made, both from the private and public sectors.



MAINE TOURISM VALUE/ FACTS *about our* VISITORS.

Tourism is a vital economic driver for the state of Maine and has a broad impact on many other industry sectors. In 2013, tourism contributed over \$5.2 million in direct expenditures and supported 88,585 jobs, so it is a major contributor to the state economy. Maine visitation has grown over the past five years from 31.9 million to 35.8 million visitors in 2013. Visitors come primarily from the New England and Mid-Atlantic regions of the U.S. and from eastern Canada; however, Maine draws visitors from all over the world. Moreover, according to MOT's research, consumers indicate:

- Top-of-mind destination awareness is 77%
- Top-of-mind ad recall is 39% [aided], which is higher than the New England competitive set
- Level of agreement with brand platform/brand attributes
 - Be adventurous 86%
 - Rediscover my own nature 77%
 - Follow my own inner compass/do my own thing 73%
 - One-of-a-kind unique experiences 72%
- Advertising convinced me to consider taking a trip to Maine 35%
- Advertising confirmed the decision I had already made 31%
- Likelihood to recommend 92% among overnight visitors

Although these are very positive metrics, we need to remember that other destinations may generate similar perceptions among visitors, and we cannot afford to become complacent. We must continue to improve our products and services in order to effectively compete in the domestic and international marketplace, particularly as we prepare for emerging new segments and markets and diversify to meet the changing expectations of visitors.

COLLABORATIVE PLAN DEVELOPMENT PROCESS.



As required by legislation, the Maine Office of Tourism sought direct input and collaboration from the tourism industry to aid in the development of this five-year strategic plan for state tourism growth aimed at maximizing the effectiveness of state and private sector contributions in attracting visitors to the state and increasing tourism-based revenues. We spoke to people with broadly divergent points of view and engaged in many passionate conversations about the future of tourism in Maine. We looked inward at the strategies and tactics applied to date, and outward at the successes of other destination marketing organizations, as well as trends, travel patterns and changes in consumer decision-making—all of which shapes tourism locally, national and internationally.

Specifically, an industry best-practices approach was followed, such that the Strategic Plan Development Process included these phases:

- Information Gathering
 - Long-term strategic plans from leading-edge destination marketing organizations [DMOs] were reviewed
 - Industry trends, forecasts and outlooks were scoured
 - Consumer travel trends were analyzed, using Maine/MOT-specific data sources [e.g., Digital Research/DPA research reports] as well as industry-leading syndicated tourism resources [e.g., U.S. Travel Association, MMGY Global, Mediemark Research Inc., Mandala, U.S. Department of Commerce, etc.]
- Industry Outreach and Input
 - MOT completed its own internal SWOT analysis
 - Three industry input meetings were hosted in 2013:
 - January 30 at the Samoset Resort, Rockport — 120 attendees
 - April 4 at the Holiday Inn by the Bay, Portland — 70 attendees
 - April 17 at the Richard E. Dyke Center for Family Business, Bangor — 45 attendees
 - A specific email account was established by MOT to capture ongoing industry input related to the Plan: maintourismoffice@gmail.com
 - An online survey was sent to 5,794 industry members in September
- Executive Perspective and Guidance
 - MOT shared key highlights from the prior steps with the Maine Tourism Association, Maine Innkeepers Association, Maine Campground Owners Association, Maine Restaurant Association, Retail Association of Maine and Ski Maine
 - Draft Plan shared for preliminary commentary
 - Draft Plan for preliminary industry commentary
 - Refinement of Plan content, strategies and recommendations
 - Completion of Final Strategic Plan

INDUSTRY SWOT ANALYSIS / ADDITIONAL STAKEHOLDER INPUT.

Two-thirds [62%] of Maine businesses surveyed believe that the tourism outlook for Maine is positive, compared to only 13% who believe tourism business will decline over the next five years. Likewise, two-thirds [63%] of Maine businesses surveyed believe that their own business will improve over the next five years, as opposed to 12% who believe it will decline. And while that upbeat and positive perspective is absolutely critical for shared success moving forward, it is as important to recognize what conditions, trends and factors will either help or hinder MOT and the Maine tourism industry in achieving the five-year vision.

As such, this SWOT Analysis was completed and has been used to help determine the strategies outlined in this Plan. This was developed from the collaborative process described in the prior section, and many of these issues were quantified and prioritized via the industry online survey.

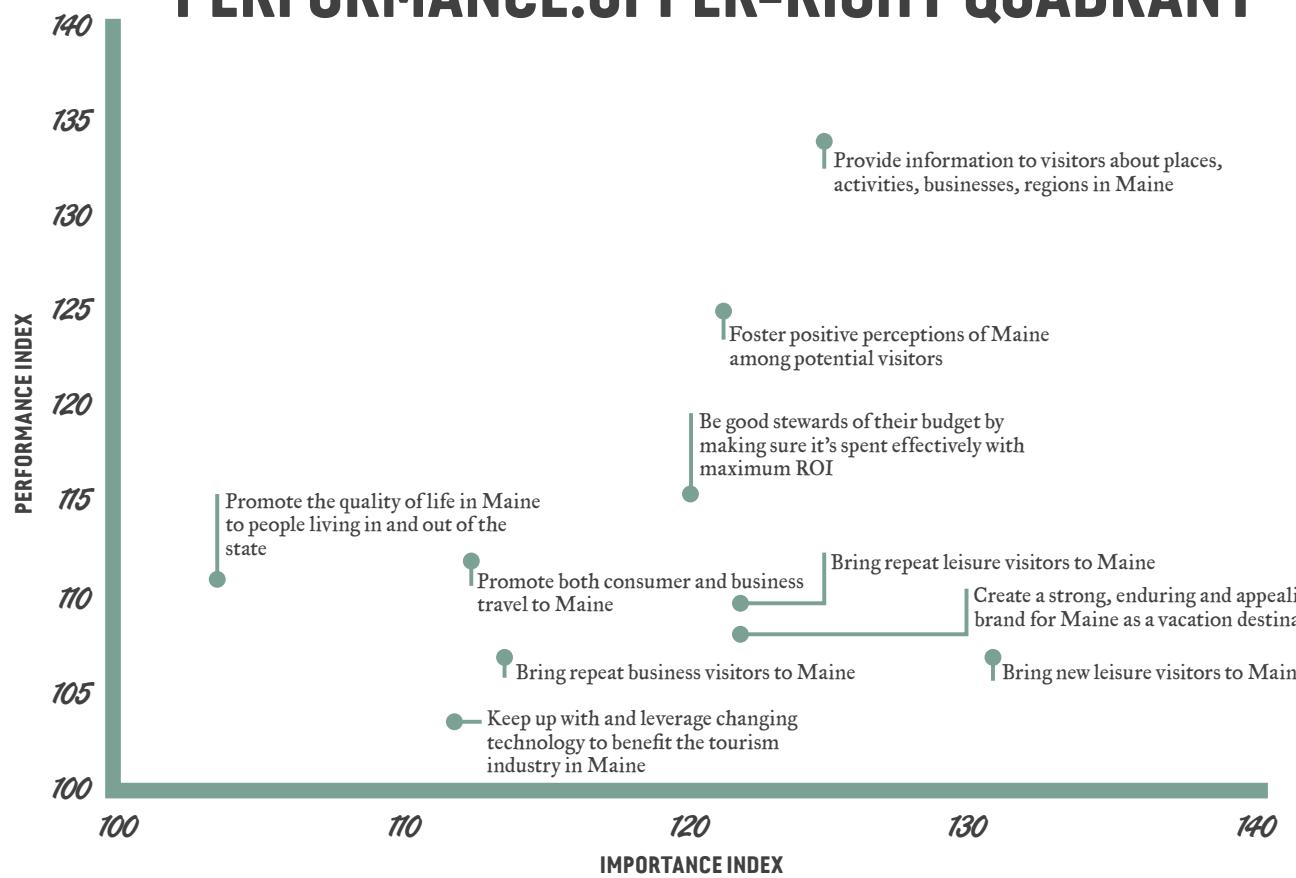


| STRENGTHS | WEAKNESSES |
|--|---|
| <ul style="list-style-type: none"> Iconic natural attractions, national and state parks Maine tourism industry performance over the past five years has been sound Global demand for authentic nature- and heritage-based experiences is growing and Maine is well placed to meet this demand MOT has maintained an active and integrated marketing program and had developed a branding platform to coalesce and optimize its messaging New/refurbished accommodations infrastructure coming online Strong agreement among industry members that tourism is an important source of revenue for the state and businesses; the livelihoods of many people and businesses depend on it; and tourism leads to additional economic growth, helps Maine businesses to reinvest in themselves, and leads to broader economic development | <ul style="list-style-type: none"> Air and road access constraints to Maine due to its geographic location Fragmented and regionally dispersed industry and lack of critical mass and linkages in tourism networks—between regions, industry associations, MOT and other government agencies Visitation to Maine is still seasonal Constraints to investment due to the size of Maine, the distance between major centers and a limited number of integrated businesses 4.7 million visitors from New England, 96% of which are repeat visitors, with little expected increase in percentage of first-time visitors Minimal collaborative efforts between private and public sector for tourism marketing and product development |
| OPPORTUNITIES | THREATS |
| <ul style="list-style-type: none"> Growth in “experiential travel,” increased social, culture-heritage and environmental awareness, and trends toward trips focused on matching one’s personal identity and values With continued economic growth predicted, people are willing to spend money on discretionary items, like leisure travel Maine’s assets critical to attracting visitors include its natural landscape [coastline, natural beauty, scenery], natural resources [water, nature], wildlife [moose, deer, birds] and the means for enjoying those things [recreation trails, drives/byways] Expansion in aviation lift, rail and ferry/cruise service Improved business and leisure traveler confidence | <ul style="list-style-type: none"> Rising fuel costs Local officials/politicians not recognizing the value and contribution of the tourism industry Constrained resources to conserve Maine’s natural resources and wildlife Legislative reallocation of the tourism budget for other initiatives Lack of wireless and internet connectivity Seasonality of tourism creating overcrowding or insufficient demand Inconsistent road/highway infrastructure Increased competition from international destinations, with minimal to modest growth in domestic travel due to fluctuating fuel costs, increasing personal debt levels, restricted vacation time, etc. |

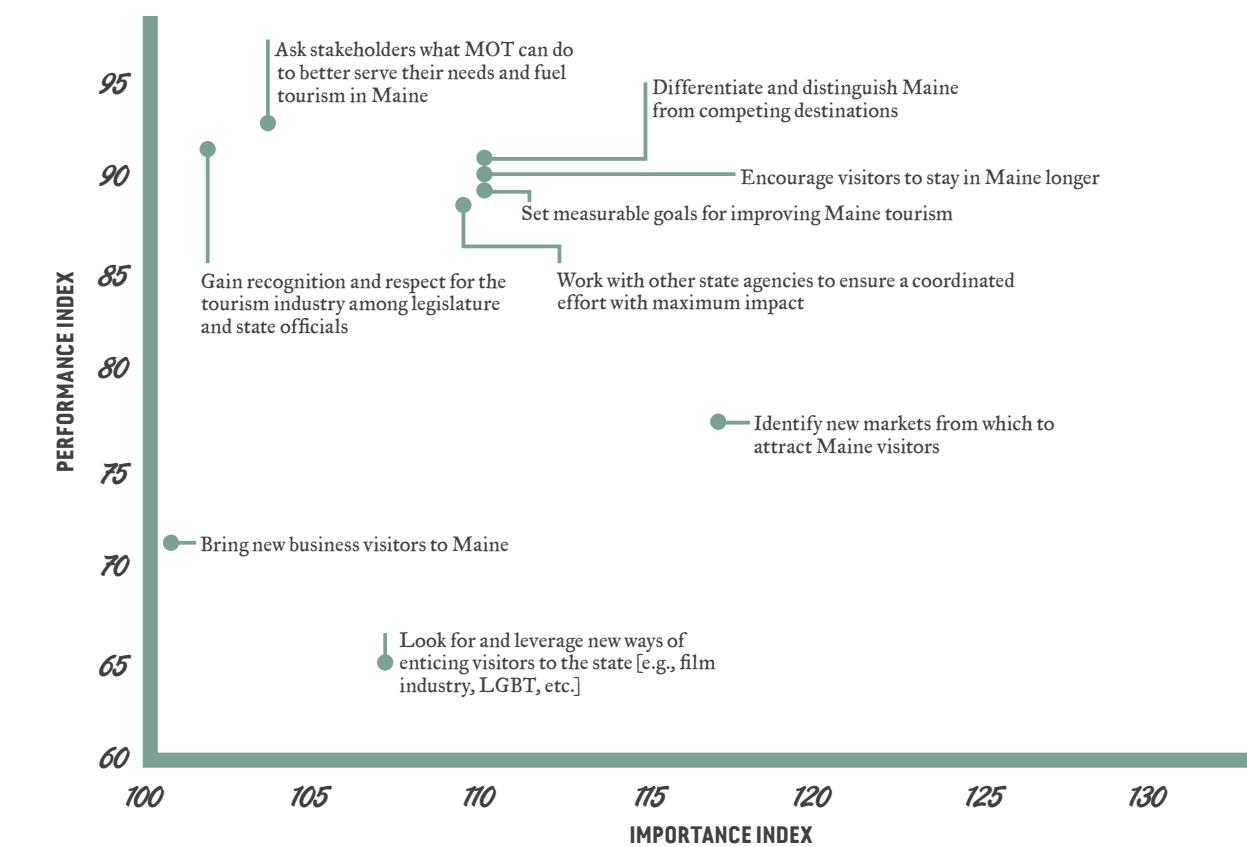
Core Competencies: Areas of High Importance and High Perceived Performance

Key Weaknesses: Areas of High Importance but Low Perceived Performance

HIGH IMPORTANCE AND HIGH PERFORMANCE:UPPER-RIGHT QUADRANT

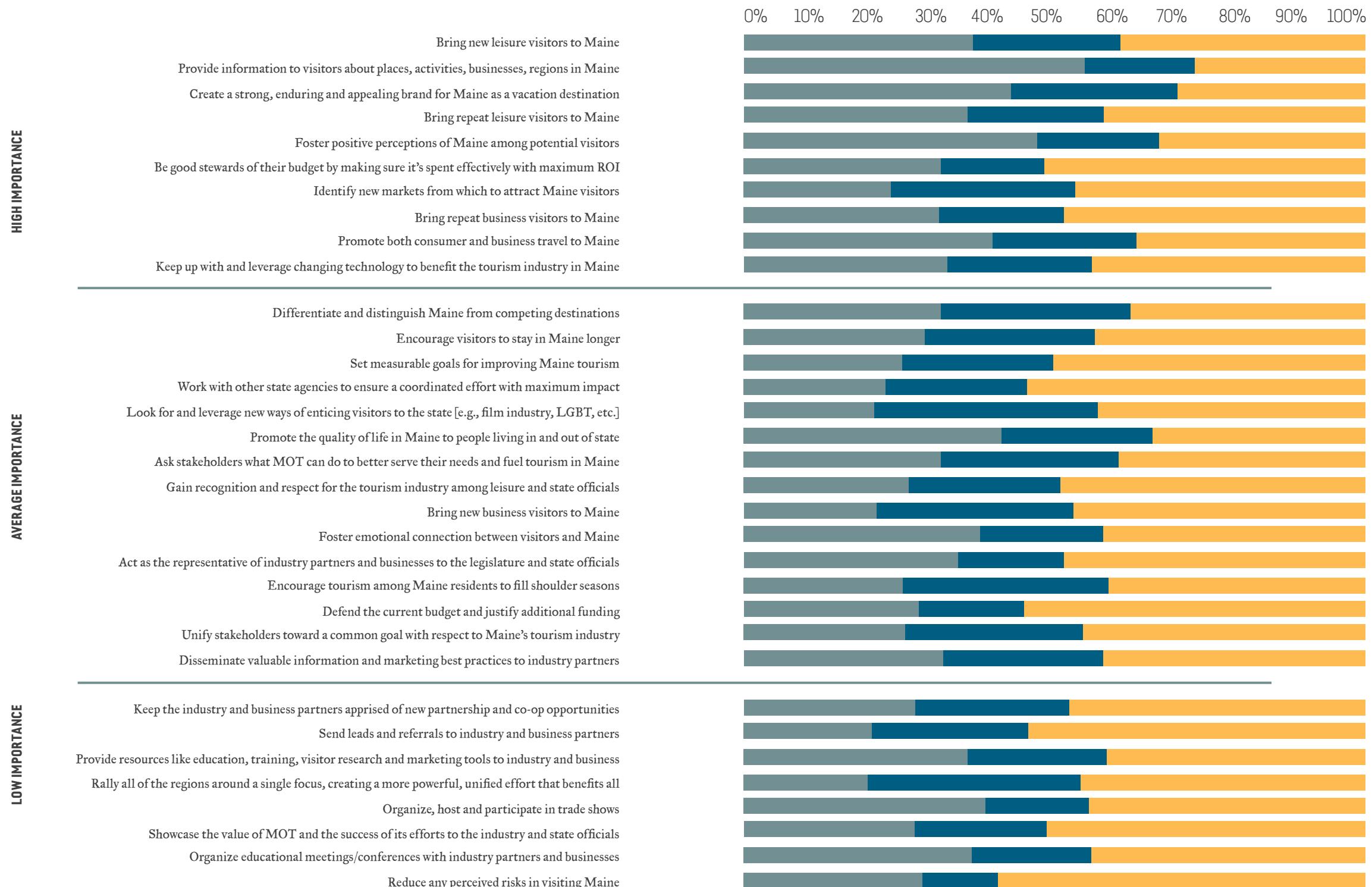


HIGH IMPORTANCE BUT LOW PERFORMANCE:LOWER-RIGHT QUADRANT



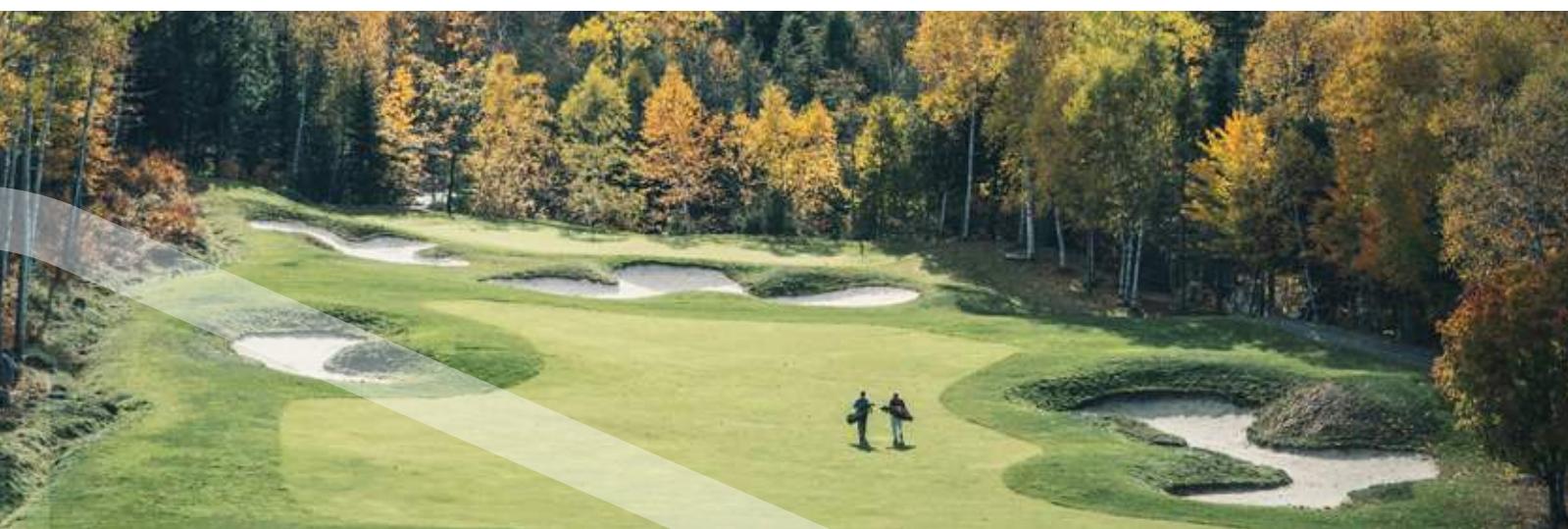
Underlying Areas of Focus: Where Industry Reports Lack of Knowledge/Clear Communications

PERFORMANCE: MET OR EXCEEDED / FELL SHORT / DON'T KNOW



TOURISM TRENDS *and* CONSUMER ANALYSIS.

The domestic and international tourism landscape is incredibly competitive, with virtually unlimited destinations competing for a share of the tourism pie. In fact, many destinations offer experiences similar to those available in Maine. Tourism is also a vulnerable industry, both in terms of unexpected shocks and its high reliance on consumers' discretionary spending ability and competition for consumers' share of wallet from other leisure activities [e.g., entertainment and shopping] or life commitments [e.g., mortgage, education expenses, health/medical expenses].



In an environment characterized by changing consumer preferences and varying financial pressures, the challenge for the Maine tourism industry is to clearly focus and understand not only the type[s] of visitors it needs to target, but their underlying motivations and values—so that the Maine tourism experience acts as an antidote ... something they crave more of, or that is missing, in their day-to-day lives.

In fact, as reported in *Fast Company*, while brands [inside and outside tourism] spend millions of dollars trying to make consumers fall in love with them, new research finds functional benefits just don't cut it. Specifically, it was revealed that making a consumer fall in love with a brand depends on narrowing the psychological distance between the buyer and the product. The three necessary components to make buyers fall in love include: Enticing Self Benefits, Enabling Self Benefits and Enriching Self Benefits. [Source: *Fast Company*, *Journal of Consumer Psychology* June 2013]

Extensive academic research over the past few years not only corroborates the critical importance of self benefits, it expands our understanding of how this works in destinations—like Maine. For example, academic research has shown that ...

- “Products/services/experiences” and the attributes they possess represent the “means” by which consumers obtain important consequences or benefits and reinforce important personal values or “ends.” In fact, there is a direct linkage and interplay between the attributes and the personal values [motivations] that tourists take into consideration when they select a particular destination.
- Tourism marketers who understand “self-congruity”—the match between destination image and tourists’ self-concept—can develop effective positioning strategies that increase profitability. The greater the match between destination image and tourists’ self-concept, the more likely tourists have a favorable attitude toward that destination and the greater the likelihood they will visit. In other words, tourists evaluate destinations based on how well the destination image fits with how they see themselves [in actuality] and/or how they would like to see themselves [ideally].
- Consumers view their preferred products, services and branded experiences [e.g., destinations] as an extension of themselves; therefore, their decision-making is motivated by symbolic value—consumers satisfy and enhance their self-consistency and self-esteem through this. Tourism destinations are rich in terms of symbolic values, given that they are a bundle of tangible and intangible components [attractions, hotels, people] associated with particular values, histories, events and feelings.
- Internal and external values exert significantly positive effect on travel motivation. Values are the basis upon which attitudes, cognition, emotion and behaviors evolve. Values are related to differences in choice criteria and actual behavior—in fact, values more accurately and effectively predict travel style than traveler demographics or personality/psychographics.
- Consumer destination decision-making process occurs within two key contexts: motivation = one’s psychological need to pursue a goal state [end state of being], and expectation = a belief that a particular action will lead to some defined outcome. In other words, a prospect has to see himself or herself in our destination and believe it will deliver what he/she wishes for.
- Consumers desire unique experiences that offer social value and enhance their self-concept. One means of achieving this is through a more dynamic process of co-creation that empowers consumers to create their own stories and narratives about their travel experiences to share with others.

In sum, consumer trends indicate that in terms of self-benefits, tomorrow's visitors will want:

- Special interest experiences—traveling with/for a purpose
- Interactive learning experiences [different cultures, personal enrichment, hands-on]
- Authentic, unique experiences [with the experience mattering more than the destination per se]
- Physical or psychological challenges [particularly nature/culture]
- Customized, individualized travel that matches one's personal identity and values

Starting in 2012, the Maine Office of Tourism has built its marketing campaigns upon a values-based approach, leveraging the “sweet spot” between what Maine offers, what visitors/prospects want, and what is unique about the Maine experience.

However, it appears that many in Maine’s tourism industry are still oriented toward more conventional audience definitions, based on activities, demographics, etc. Specifically, half of Maine tourism businesses surveyed believe the top consumer audience to focus on in the next five years is the outdoor recreation/adventure segment, by a significant margin. Other top-tier segments identified by Maine tourism businesses are family travel/attractions, and culture/heritage-oriented experiences, including downtowns/main streets/quaint villages, and Maine-based festivals and events. And most believe that mainstream and off-the-beaten-path activities as well as city and outdoor activities/venues/events should be promoted.

To this end, a key lynchpin in this Plan is for the Maine Office of Tourism to better hone and identify the leisure traveler segments of highest potential value for Maine—including their underlying motivation [end] and how that links to the unique tangible lures or draws [means] present in the state—and, to do so, with an eye toward the next generation/cohort of travelers, the Millennials, as well as new emerging international markets.

Additionally, while historically Maine’s individual businesses have taken the lead on promoting corporate travel, meetings and event travel [especially in Bangor and Portland], in the next five years MOT will have to develop focused strategies for this segment, albeit in a manner that matches the business, meetings and convention infrastructure in Maine, in its mission of supporting statewide economic development.

As such, further investment in future research, including a deeper values-based segmentation study, is critical.



DRIVING A SHARED VISION for TOURISM.

All of the aforementioned analysis, industry-identified issues and consumer trends clearly point to the need to drive to a shared vision of tourism, and the basis upon which to build it, as follows:



KEY STRATEGIES, INITIATIVES *and* ACTIONS.



Develop the Tourism Pipeline

1. Continue to implement, expand and evolve the Originality brand platform to maximize consumer impact and visitors staying in paid accommodations
 - a. Consistent branding creates greater impact and retention of our message
 - b. Continue to implement evocative, resonant brand work that communicates Maine's core values and experiences and that motivates people to visit
 - c. Open up new markets/trial new media/drive inquiry [e.g., direct response TV]
 - d. Help partners effectively adapt voice and/or style of MOT's brand campaign that can be used in various niches, markets, regions, etc.
 - e. Increase brand presence across all platforms of media
2. Expand and enrich understanding of highest-value consumer segments and the means unique to Maine to lure them to come
 - a. Expand and encourage innovative research efforts to define the next generation of travelers of the highest propensity for Maine
 - b. Develop and expand areas of niche specialization to attract special-interest travelers and encourage regional dispersal
 - c. Ensure the website, social media, publications and public relations represent the range of visitors by segment, origin market, interest, language, etc.
3. Increase awareness of Maine as a destination for film, commercial and digital media projects
 - a. Redevelop FilmInMaine.com as a key resource for effectively selling the state as an attractive place to film
 - b. Work with legislature to maximize film production incentives
 - c. Support and encourage local production resources to more effectively market themselves to prospective clients
4. Enhance the perception of Maine as a compelling destination to conduct business
 - a. Create a brand extension of the Originality brand platform directed at business travelers and influencers
 - b. Target business influencers and meeting planners in key industries via public relations and face-to-face opportunities to educate, inform and inspire them on the full scope of meeting opportunities, services and value offered
 - c. Create the means to continue the conversation to increase knowledge regarding Maine's business-related offerings
5. Influence stakeholder efforts to secure improved and expanded infrastructure and product development
 - a. Develop specific tour operator/travel agent programs to further promote international travel
 - b. Continue to work with industry to grow specific motor coach programs
 - c. Trial a new cooperative marketing program with related industry associations [e.g., Go RVing]
 - d. Assist with stakeholder efforts to secure expanded air service, ferry service, train, etc.
 - e. Work more with neighboring states/provinces to promote regional travel
 - f. Work with industry partners to grow specific sports-related tourism through attraction of new events, enhancement of existing signature events, etc.

Grow Off-Season Visitation

1. Package, cluster and co-promote
 - a. Work with the industry to utilize cultural, natural and recreational assets to enhance existing events that build urgency to visit in non-peak seasons
 - b. Enhance marketing efforts to focus off-season strategies on specific travel segments
 - c. Focus public relations and social media strategies on leveraging niche markets
 - d. Collaborate with the industry to elevate a suite of existing signature experiences/events and identify a grouping of potential such events that personify the Maine vacation experience and act as drawing cards to attract off-season, day-trip and limited-risk visitation
 - e. Maximize heritage/history assets, festival events, cultural experiences and Maine-made products by clustering and cross-pollinating via content development that promotes complementary experiences
 - f. Link visitors to Maine-made products to promote local foods, farmers markets, artisan shows, gallery tours, handcrafts, etc.
 - g. Encourage visitors to experience more areas of the state by showcasing multiple artisan/craftsman trails throughout the state, with themes and art/craft/history/tribal highlights along each
 - h. Develop a platform and support the industry's efforts to encourage Mainers to "bring a friend"/"refer a friend" to create loyal off-season visitors
 - i. Trial a joint program to expand Maine's relevance through building communities of like-minded brands based on the principles of living true to one's own inner compass [e.g., Dr. Pepper]

Protect Maine's Tourism Assets

1. Generate awareness, pride and a nurturing spirit
 - a. Raise awareness of MOT across the state as a leader in sustainability
 - b. Continue to keep natural/outdoor assets at the core of MOT's promotional messaging
 - c. Partner with other state government agencies/sectors to cross-promote tourism, e.g., forestry, hunting & fishing, lottery, etc.
 - d. Collaborate with sister agencies to maintain the balance and leverage opportunities between Maine's natural tourism assets and business growth and development
 - e. Invest and partner with organizations that develop vacation experiences and products
 - f. Connect Maine tourism with education providers to inspire future business leadership [e.g., scholarships, support for school of hospitality, etc.]
 - g. Work with regional tourism organizations to:
 - Better align regional efforts with MOT's overall marketing goals
 - Create tourism-related product/business growth in their respective regions, with an emphasis on programs that drive small town and downtown development as well as highlight local cultural assets

Make Tourism a Shared Imperative

1. Grow strategic partnerships to align and leverage resources, grow and expand funding, and achieve core goals
 - a. Public land management agencies
 - b. Economic development/business development
 - c. Private sector [consumer goods, services and tourism businesses]
 - d. Foundations
 - e. DMOs
 - f. Educational institutions
 - g. NGOs
2. Assist Mainers, business leaders and elected officials to see tourism as a vital strategy for economic development and as a key component of Maine's quality of life
 - a. Continue to positively impact the statewide economy through tourism by generating visitor spending and tax revenue
 - b. Facilitate revitalization of key areas
 - c. Increase tourism awareness and knowledge through educational outreach and initiatives
 - d. Utilize elected government officials to act as media and resident spokespeople on the value of tourism
 - e. Publish continuing stories of the value of tourism to the state economy, business card proof points, media talking points, fact sheets, etc.
 - f. Distribute Strategic Plan Annual Progress Report to the governor, legislature and industry stakeholders
3. Foster stronger statewide team effort
 - a. Improve effectiveness of communications between MOT, the industry and the regions to enhance clarity of role, expectations, functions and available support
 - b. Develop at-a-glance fact sheet outlining roles/responsibilities of all related tourism agencies, top-down [e.g., DECD, MOT, MTA, regions, industry associations, etc.] and publish widely by multiple channels
 - c. Create a clearer connection between the impact of the industry and MOT's role in statewide marketing
 - d. Conduct annual Maine resident attitude/opinions survey regarding the value of tourism and distribute results



ORIGINAL
MAINE



CONCLUSION.

The Maine Office of Tourism continues to play a lead role in bringing together the varied interests of the travel and tourism industry within the state. With this Plan, we establish a roadmap to guide the efforts and investments of MOT while creating a collective vision of tourism—as a vital economic driver—for the industry and the state at-large.

The imperatives, strategies and actions in the Plan represent the interests of the Maine Office of Tourism, along with the broader tourism industry, and provide a framework for action, as well as a platform for education, advocacy and dialogue. It is our hope that as a result of this work, we will not only meet or surpass our critical success factors, but speak with one voice, and that our ongoing communications will foster greater understanding and shared commitment and more effective collaboration by all who reside here.

By pursuing the imperatives set out in this Plan, MOT is paving a new pathway for growth, aimed at achieving one overarching goal: increasing direct tourism expenditures to \$6 billion in 2019.

Meeting this goal would strengthen practically every segment of our state's economy—incremental revenue, increased taxes paid by visitors, new jobs, etc.

We view this Plan as a living document whose ongoing review will provide the structure to guide long-term strategy, while giving us the flexibility to respond to new, unforeseen challenges and opportunities that arise during the next five years. We are proud of our work and are committed to continuing to drive benefits for our industry, our environment, our state, our residents and all of our visitors.





ORIGINAL

MAINE

ADVENTURE

