Maine

04.10.19

5-YEAR STRATEGIC PLAN

Building Momentum

Steady growth **over the last five years directly aligned with goals of prior strategic plan**

- Develop the pipeline
- Grow off-season visitation
- Protect Maine’s tourism assets
- Make tourism a shared imperative

Carries forward *momentum and successes* into next five years

Identifies new areas of focus and concentration necessary to *compete and grow*

PURPOSE:

Create a *bold* vision for the health and economic vitality of the tourism industry

Developed with direct input and collaboration from the tourism industry

Sets in motion a unified statewide action plan while addressing *unique challenges* to each region

Unites tourism industry around clear action steps that determine the future *economic and social vitality* of the industry

Objectives

- Identify and address industry obstacles and challenges.
- 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.

STATE OF THE INDUSTRY

State of the Industry

While *brand health* numbers are strong, travelers have more choices than ever when deciding where to travel

Maine tourism industry must continue to improve products and services in light of *new technologies* and *changing travel expectations*

Destination Next Survey

- Focus in product development in *rural areas*
- Focus in meeting facilities, sporting events, public transportation in *urban areas*

PROCESS OVERVIEW

Process Overview

Information Gathering:

- Reviewed outcomes from previous strategic plan through 2019
- Gained insights from other successful destination marketing organizations
- Gather industry trends, outlooks and forecasts
- Analyzed MOT and consumer data, and other secondary research regarding travel trends
- Reviewed results from Destination Next Study in 2017
- Conducted internal SWOT analysis

Industry Outreach + Input:

- Fielded an online survey sent to 5,644 industry partners, completed by 360
- Facilitated listening sessions with 198 tourism businesses and community leaders
- Monitored email account set-up to facilitate dialogue

INDUSTRY TRENDS

Experiential vs. Tangible

37% of consumers indicated that they would spend money on food and drink experiences. That was followed by events and festivals at 27%.

- Travel Pulse

Retailers like Gucci and Ikea are expanding beyond the tangible with hotels, while accommodation providers like airbnb are creating experiential offerings.

Experiential categories such as skip-the-line historical experiences, food tours, and cooking classes skyrocketed, with year-on-year growth figures ranging from 50-125%.

This trend of experience-driven travel is set to continue, and OTAs are gearing up to offer more unique tours and activities.

What may seem like a fad may be a larger acknowledgment of a consumer mindset shift towards experiences over things.

TRENDS & CULTURE

Micro-Travel & Limited Locales

Micro travel is a move to more personal and curated adventure that is focused, manageable and illuminating. You see less but you see more.

There is a noticeable swing toward finely targeted itineraries aiming to make travel more personally rewarding, rather than a race to tick off items on a list.

For millennials, micro travel comes naturally. They want their travel self-controlled, seamless and relevant. Cousin, Walc, Localeur, Memrise and the new Google Trips all help the independent traveler to connect with locals and design a tailored travel experience.

- The Globe & Mail

"We travel not to escape life, but for life not to escape us."

The Anti-Tourist

"As we strengthen the efforts to attract more visitors, we must keep in mind both the livability of the locals and the great visitor experience. ***In other words, we need to facilitate the meeting between locals and visitors. If we fail to do so, we simply risk that the locals will turn against tourism – and vice versa.*** *Looking at it like this, visitor growth in itself is not a goal."*

- Copenhagen Tourism

It's no longer about attracting tourists.
It's about creating temporary locals.

TRENDS & CULTURE

Spontaneity Celebrated

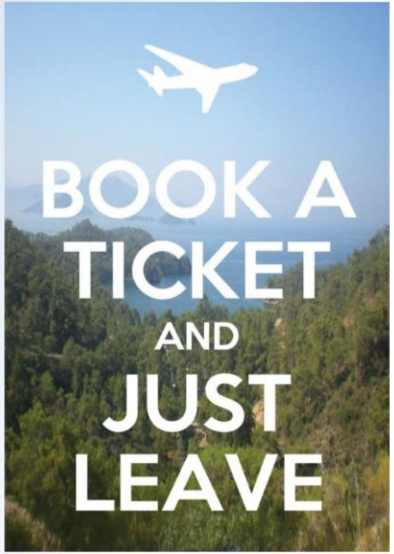
Blind booking has been a growing trend in Europe. Lufthansa and Eurowings allows travelers to purchase ticket based on the experience they are seeking - without knowing a final destination.

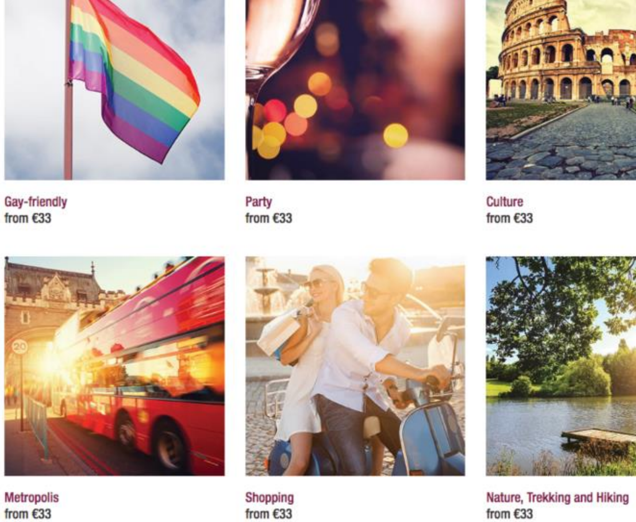
More than 60% of U.S. travelers would consider an impulse trip based on a good hotel or flight deal.

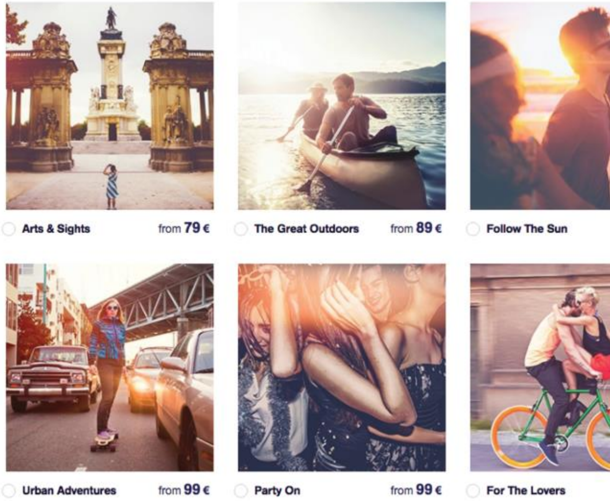
- Google/Phocuswright, 2017

Travel-related searches for "tonight" and "today" have grown over 150% on mobile, over the past two years.

- Google Data, 2017







Personal Values + Beliefs Drive Action

*Belief-driven buying is now a mainstream mindset across ages and incomes. People believe that **brands** 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.*

- 2018 Edelman Earned Brand Study

Hearing is Believing & Digital Assistants

Voice technology promises brands a richer and deeper engagement with consumers.

Brands can leverage this relationship to add true value to the customer experience.

By identifying moments when voice can enhance the customer journey, providing practical support, cutting out steps or making life a little easier, brands can build engagement.

Globally, 43% of regular voice tech users say they love their voice assistant so much they wish it was a real person.

70% of requests to Google Assistant are expressed in natural language, meaning that people are getting more comfortable having conversations with computers.

Over 1 in 3 travelers across countries are interested in using digital assistants to research or book travel, and are already searching for everything from hotels to flights, and things to do in-destination.

- Google/Phocuswright, 2017

CRITICAL INSIGHTS + KEY PILLARS

Goal Setting

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: DPA (Lauren to confirm)*

***Source: Maine Revenue Service*

Goal Setting

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%**

Goal Setting

Communication, Education + Collaboration Goals:

- Increase industry familiarity 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 on unify stakeholders toward a common goal with respect to Maine’s tourism industry from **28% to 35%**


FIVE YEAR STRATEGY PLAN
MAINE

THANK YOU.