



MAINE'S 10-YEAR OUTDOOR
RECREATION ECONOMY ROADMAP

TRAILBLAZER

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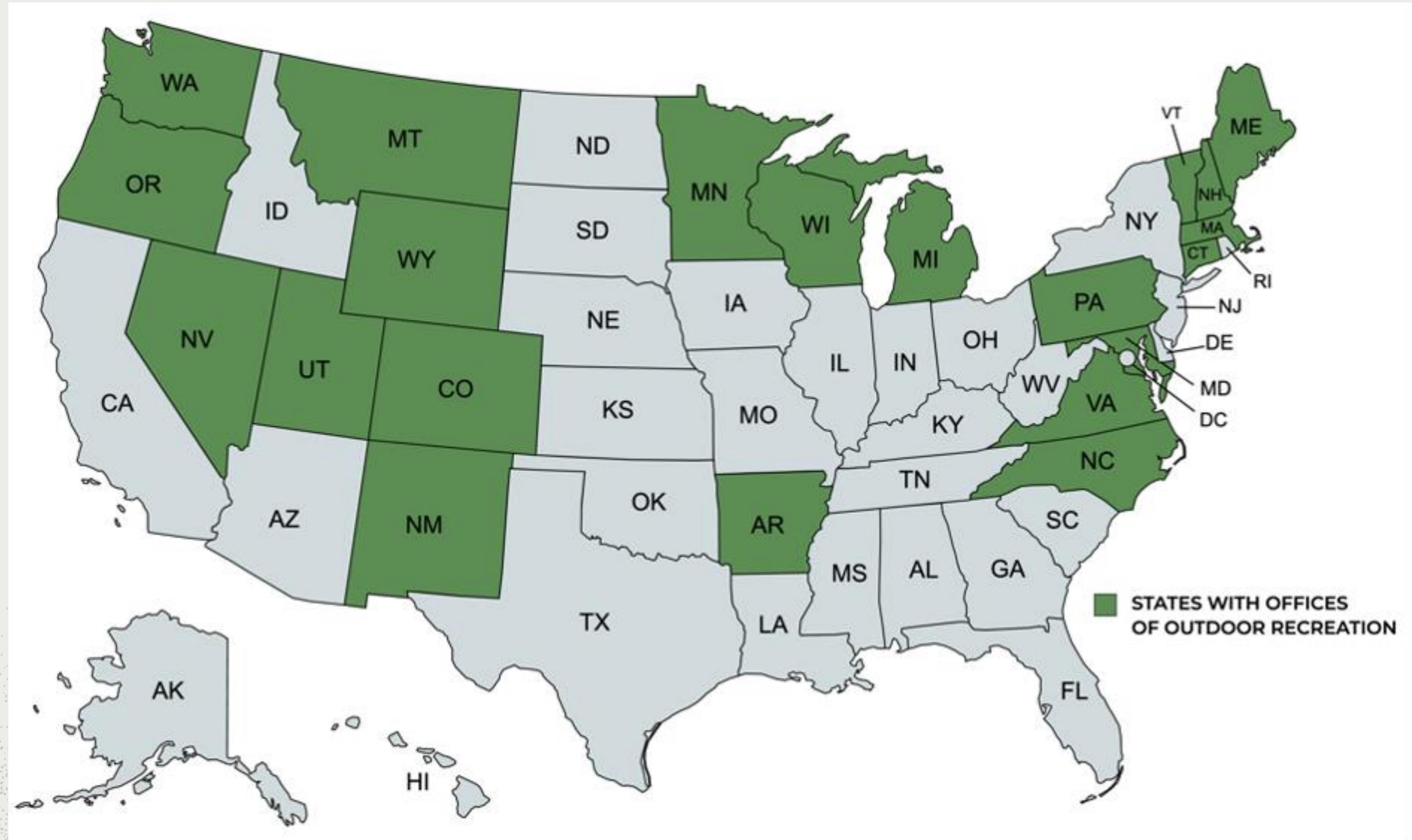
<https://www.trailblazerroadmap.com>



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 1st office.
- 2018 - Maine creates the 10th office.
- 2023 – MA launches the 20th office.
- 2024 – CT announces the 21st 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.

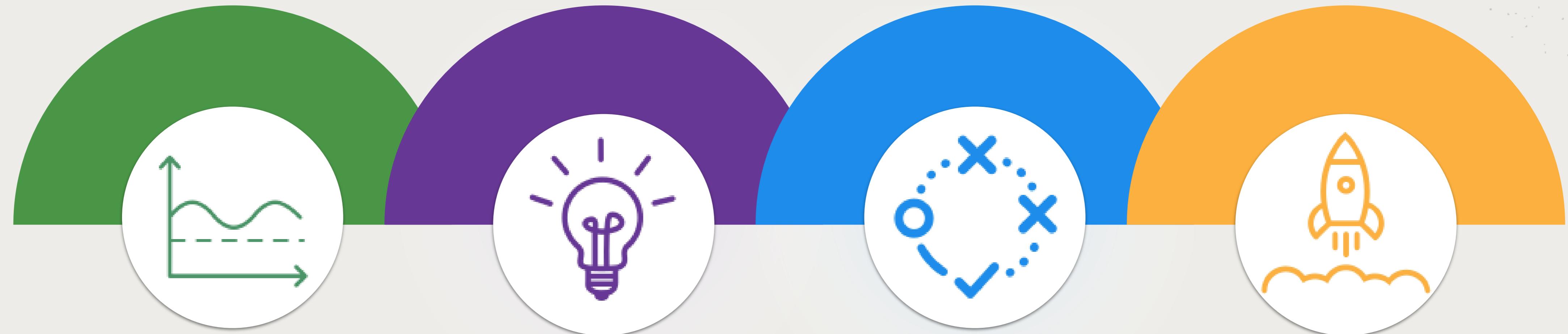


Identify key strategies and investment needed to fuel the growth of the outdoor economy state-wide for the next 10 years



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

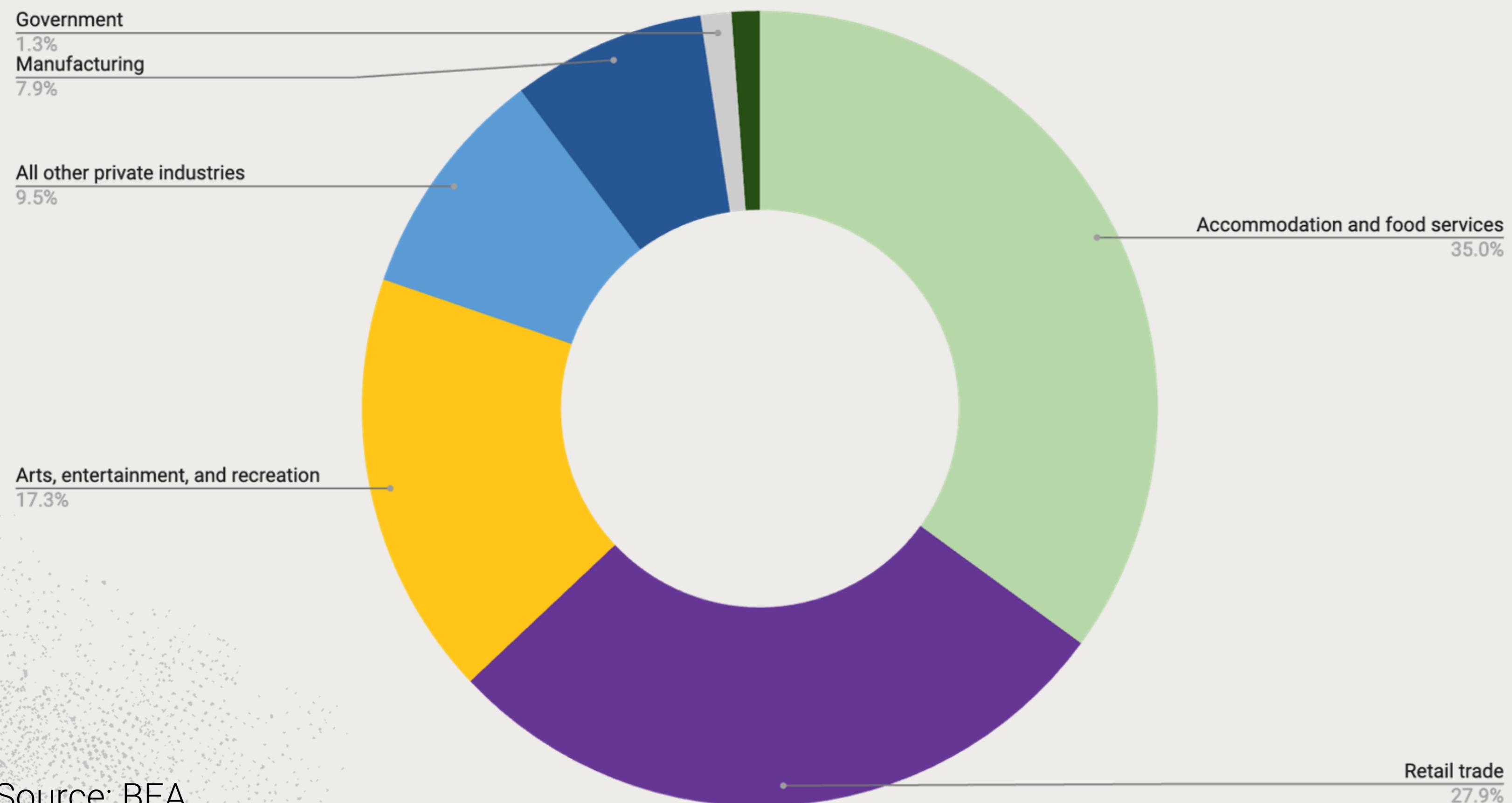
MOVING TO ACTION

- 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

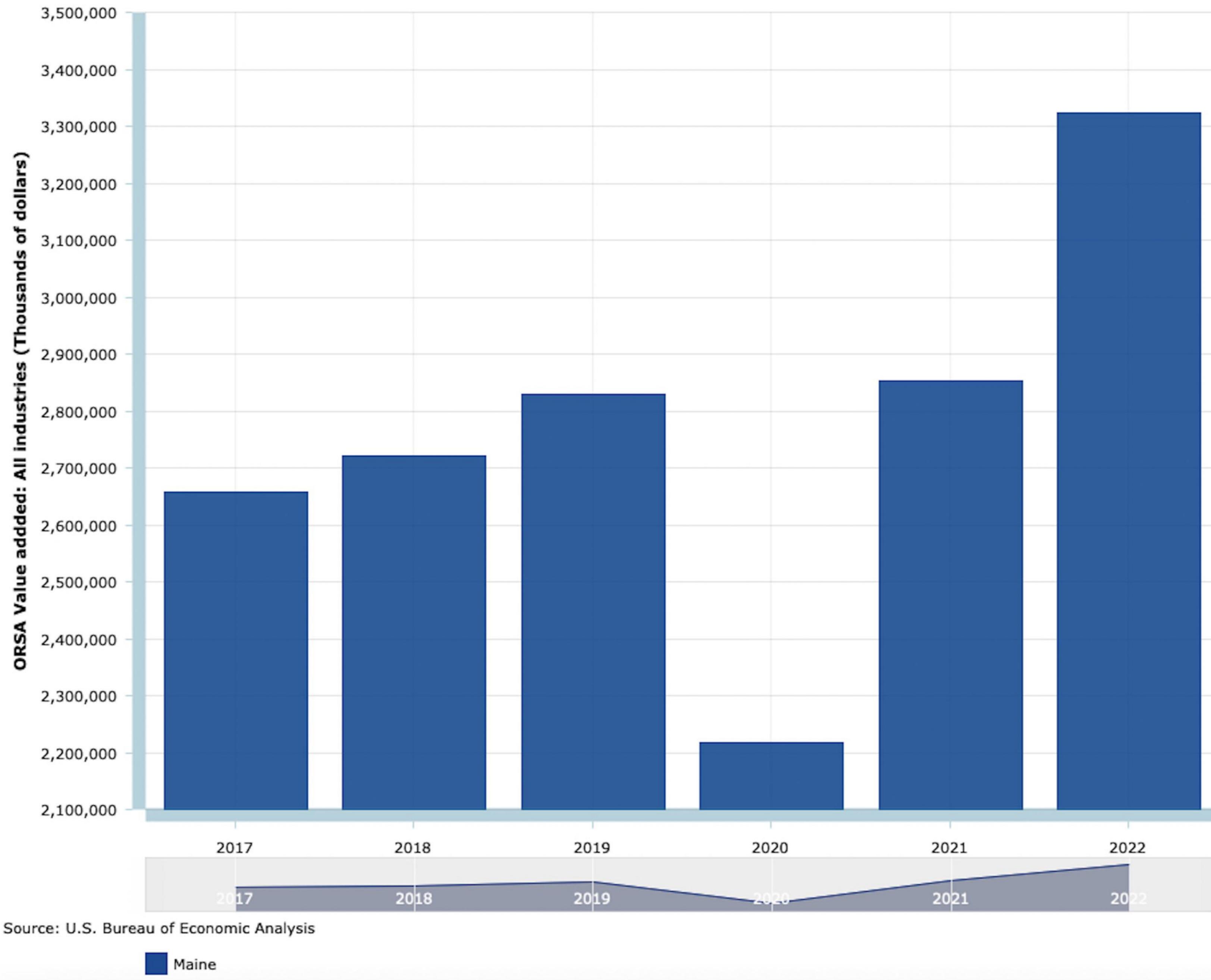
Maine's outdoor economy grew **16.5%** from 2021 to 2022.

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

SAOVA Outdoor recreation satellite account value added ¹



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.

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, LGBTQ+ 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

<https://www.trailblazerroadmap.com/get-involved>

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)

October 2023 -
December 2023

January 2024 -
March 2024

Priority Identification

Data analysis; Engaging community leaders; Evaluate community input

April 2024 -
June 2024

July 2024 -
September 2024

Roadmap Finalization

Review draft roadmap; Identify actions; Form implementation committee; Public launch



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.