DESTINATION NEXT

Maine Statewide Assessment – Downeast Acadia

June 6, 2018

DestinationNEXT

Vision:

Provide destination organizations with a powerful assessment tool and practical actions and strategies for sustainable success in a dramatically changing world
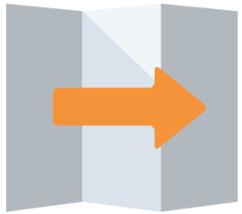
Futures Study

- 75 trends & 55 strategies
- 433 respondents in 52 countries
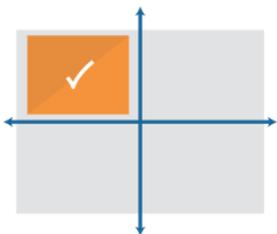
Scenario Model & Assessment Tool

- 4 unique scenarios
- 163 detailed assessments in 11 countries

DESTINATIONS INTERNATIONAL

Maine - 8 Regional Assessments

April 10
- **Portland: Greater Portland & Casco Bay**
- **Auburn: Maine Lakes & Mountains**

April 11
- **Farmington: Maine Lakes & Mountains**
- **Hinckley: Kennebec Valley**

April 12
- **Dover-Foxcroft: Maine Highlands**
- **East Millinocket: Maine Highlands**

April 13
- **Bangor: Maine Highlands**

October 16
- **Fort Kent: Aroostook County**
- **Presque Isle: Aroostook County**

October 17
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

October 18
- **Rockland: Maine Mid-Coast and Islands**

October 19
- **Biddeford: The Maine Beaches**
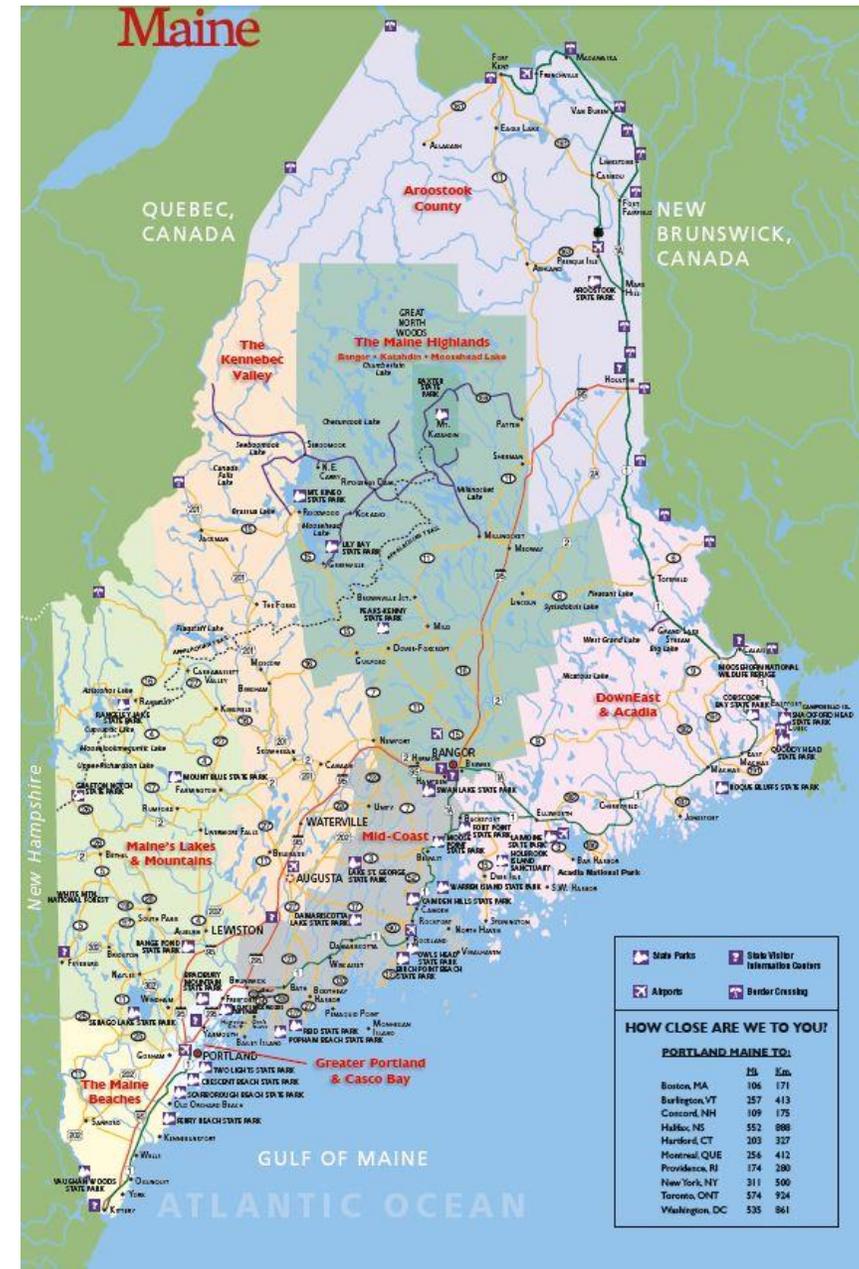
Today's Objectives

1. Present scenario model & overall DestinationNEXT findings

2. Review assessment results for Maine and region

3. Discuss NEXTPractices

4. Discuss potential initiatives & next steps

SCENARIO MODEL

Scenario Model

Strong Community Engagement

Developing Destination

VOYAGERS

TRAILBLAZERS

Established Destination

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Purpose of Diagnostic Tool

Scenario model intended to be strategic diagnostic tool, not a benchmarking index to rank DMOs, CVBs or destinations

Objective self-assessment to help identify priorities and strategies for the future

Strong Community Engagement

VOYAGERS   TRAILBLAZERS

Metropolis

Developing   Established
Destination   Destination

EXPLORERS   MOUNTAINEERS

Weak Community Engagement
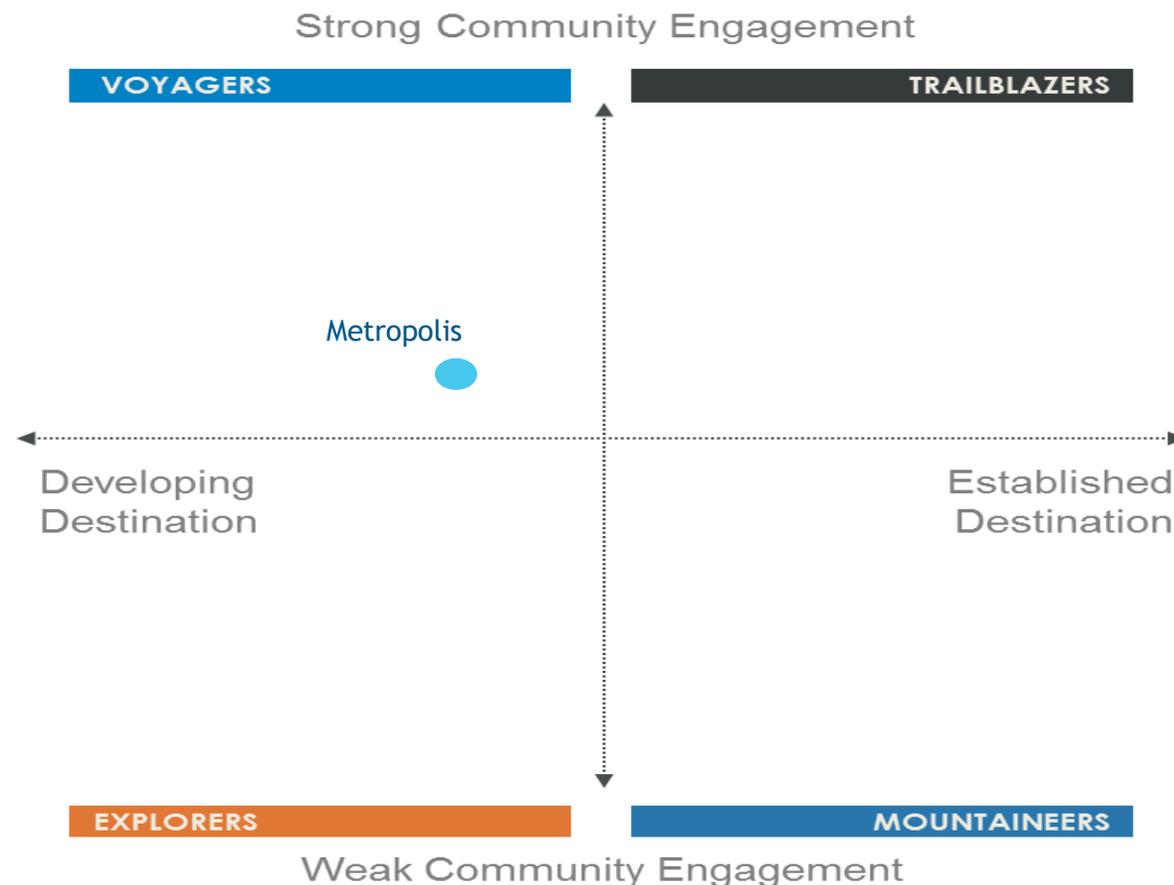
Destination Strength Variables

Destination Performance

Brand

Accommodation

Attractions and Entertainment

Conventions & Meeting Facilities

Air Access

Events

Sporting and Recreation Facilities

Communication & Internet Infrastructure

Mobility and Access

Community Support & Engagement Variables

DESTINATION NEXT

Effective DMO Governance Model

Membership Strength & Support

Industry Support

Local Community Support

Policy and Regulatory Environment

Workforce

Hospitality Culture

Regional Cooperation

Funding Support & Certainty

Economic Development

Destination Assessments

350

destinations from
18 countries

163

detailed
assessments
completed in 11
countries

USA, Canada,
Mexico, Switzerland,
Colombia, Korea
Guatemala, Taiwan,
Denmark, Brazil
Australia

70

underway or
planned,
including 4 other
countries

Dominican Republic, El
Salvador, Ecuador
South Africa

60

in discussions,
including
14 other countries

Peru, Argentina, Dubai,
Germany, Honduras, Chile,
New Zealand, United
Kingdom, Thailand,
Micronesia,
Philippines, Russia, Ghana,
Nigeria

United States

Canada

Latin America

Europe

Asia/Australia

DESTINATION NEXT

Monterey Cluster

Cabo San Lucas
Vera Cruz

Meet Puerto Rico

YUCATAN OFICINA DE CONGRESOS Y CONVENCIONES

GUATEMALA BURÓ DE CONVENCIONES

CAMARA DE COMERCIO DE BARRANQUILLA

PRO BARRANQUILLA

GREATER BOGOTÁ

MEDELLIN CONVENTION & VISITORS BUREAU

Cali Colombia

Visit Iguazu

WONDERFUL COPENHAGEN

Switzerland. get natural.

GENEVA AT WORK CONVENTION BUREAU

GENEVA LIVE TOURISM

中華國際會議展覽協會
Taiwan Convention & Exhibition Association

MEET TAIWAN

BUSINESS EVENTS SYDNEY

Regional Assessments

Northwest Florida Tourism Coalition

South Africa Convention Bureau

Global
Results

Scenario Model

VOYAGERS
10%

Strong Community Engagement

TRAILBLAZERS
41%

Developing
Destination
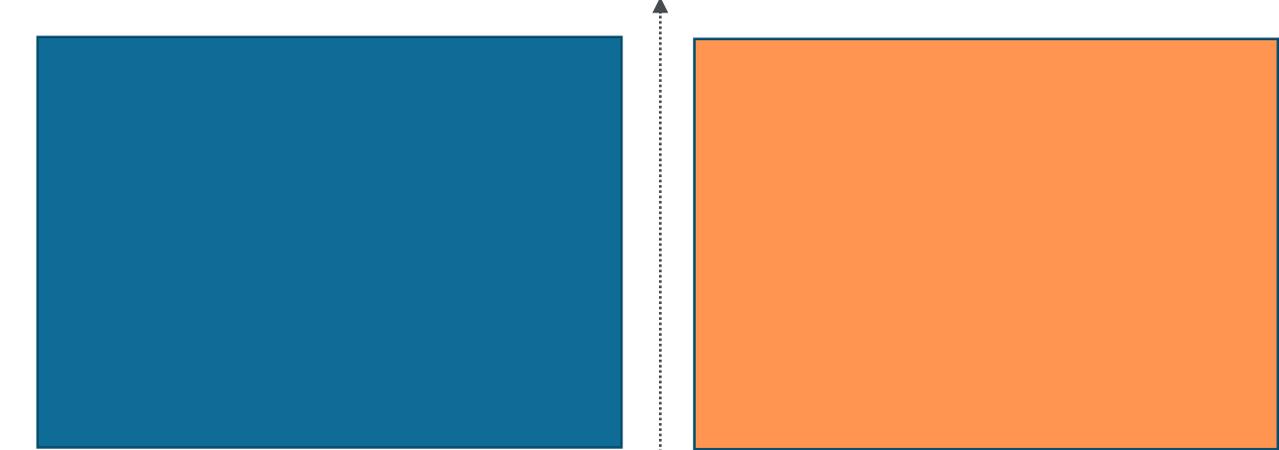
Established
Destination

EXPLORERS
40%

Weak Community Engagement

MOUNTAINEERS
9%

Destination Strength Rankings – Global Averages

|		Relative Importance
	Brand	1st
	Destination Performance	2nd
	Attractions & Entertainment	3rd
	Accommodation	4th
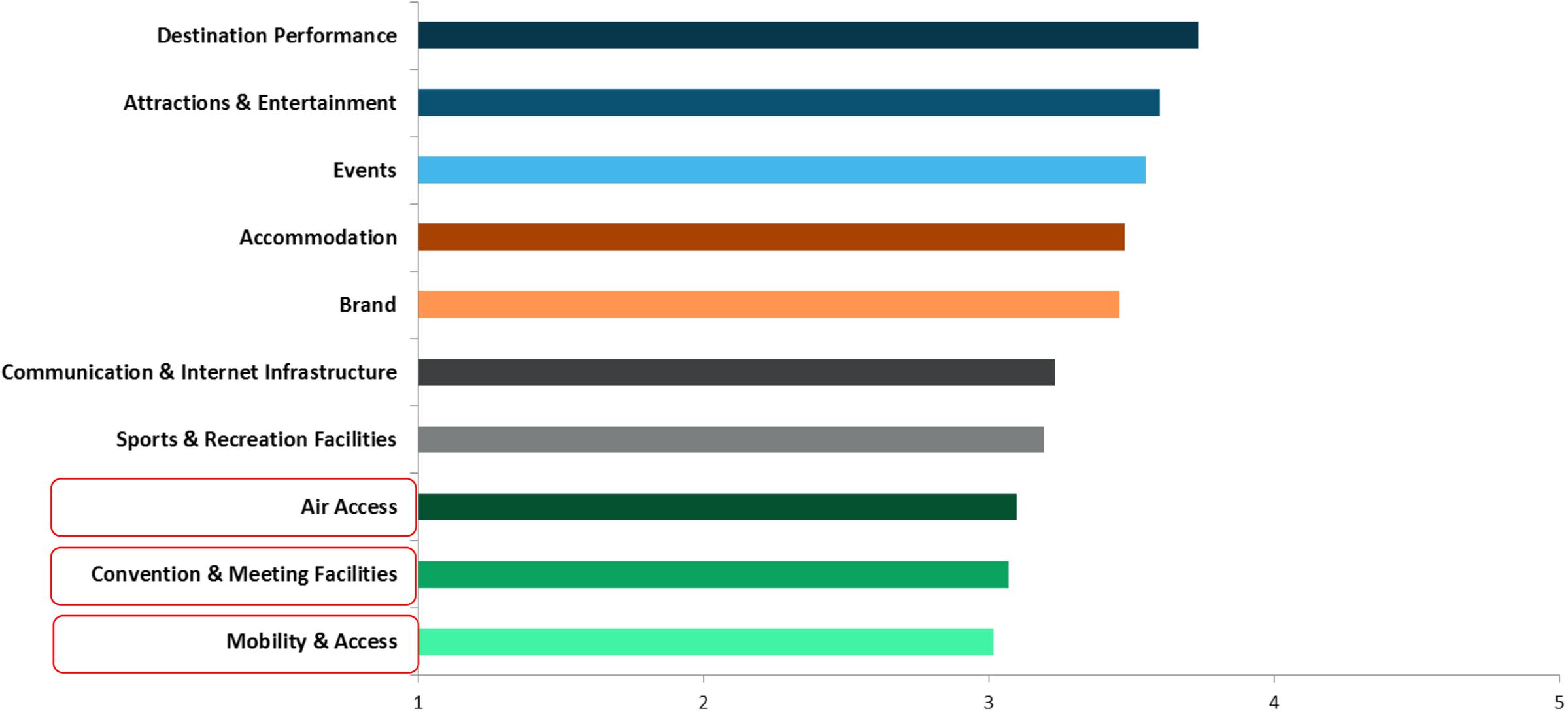
Mobility & Access

- Road infrastructure

- Public transportation

- Similar accessibility/experience for those with disabilities
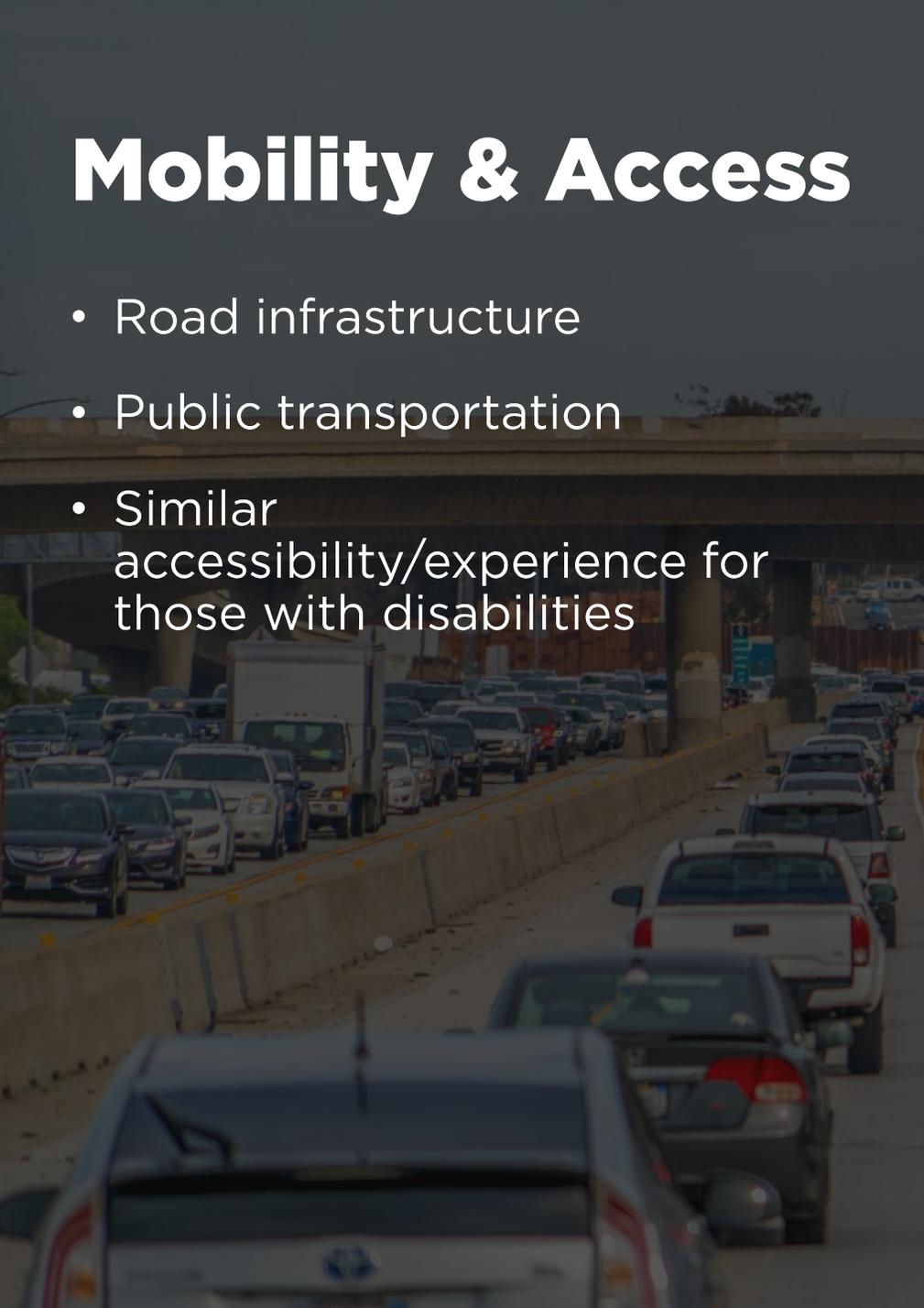
Convention & Meeting Facilities

- Necessary convention and meeting space to compete in the long-term

- Unique, off-site venues for special events

Air Access

- Airport "sense of place"

- International air access (number of flights and capacity)

- Domestic air access (number of carriers and low-cost options)

Community Support & Engagement – Global Averages

Relative Importance

Funding Support & Certainty — 1st

Industry Support — 2nd

Effective Destination Organization Governance Model — 3rd

Local Community Support — 4th

Community Support & Engagement Performance
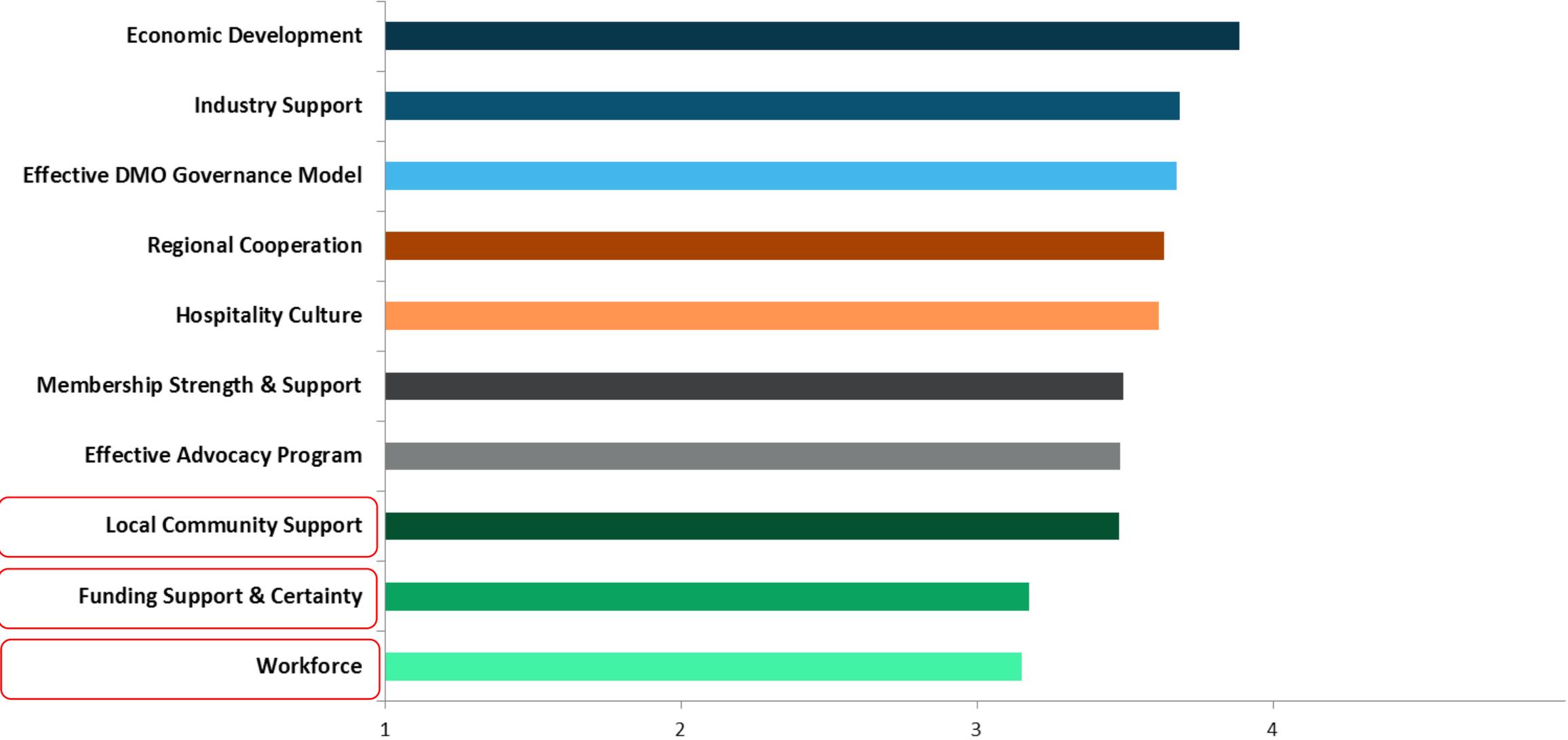
Workforce

- Workforce retention

- Labor relations environment
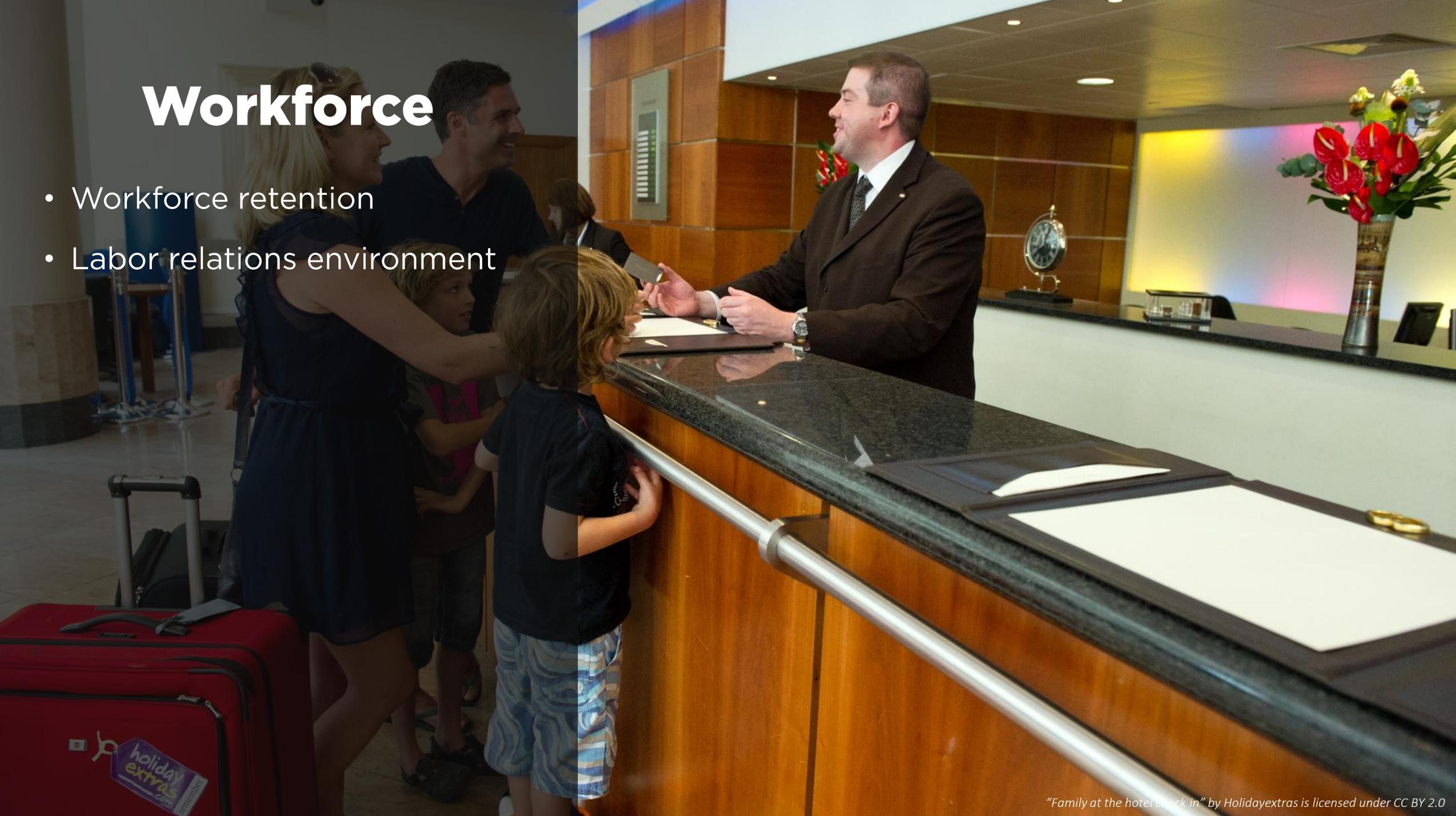
Funding Support & Certainty

- Sufficient revenue sources

Local Community Support

- Support from local residents and media

# 1,033 Responses - by Region
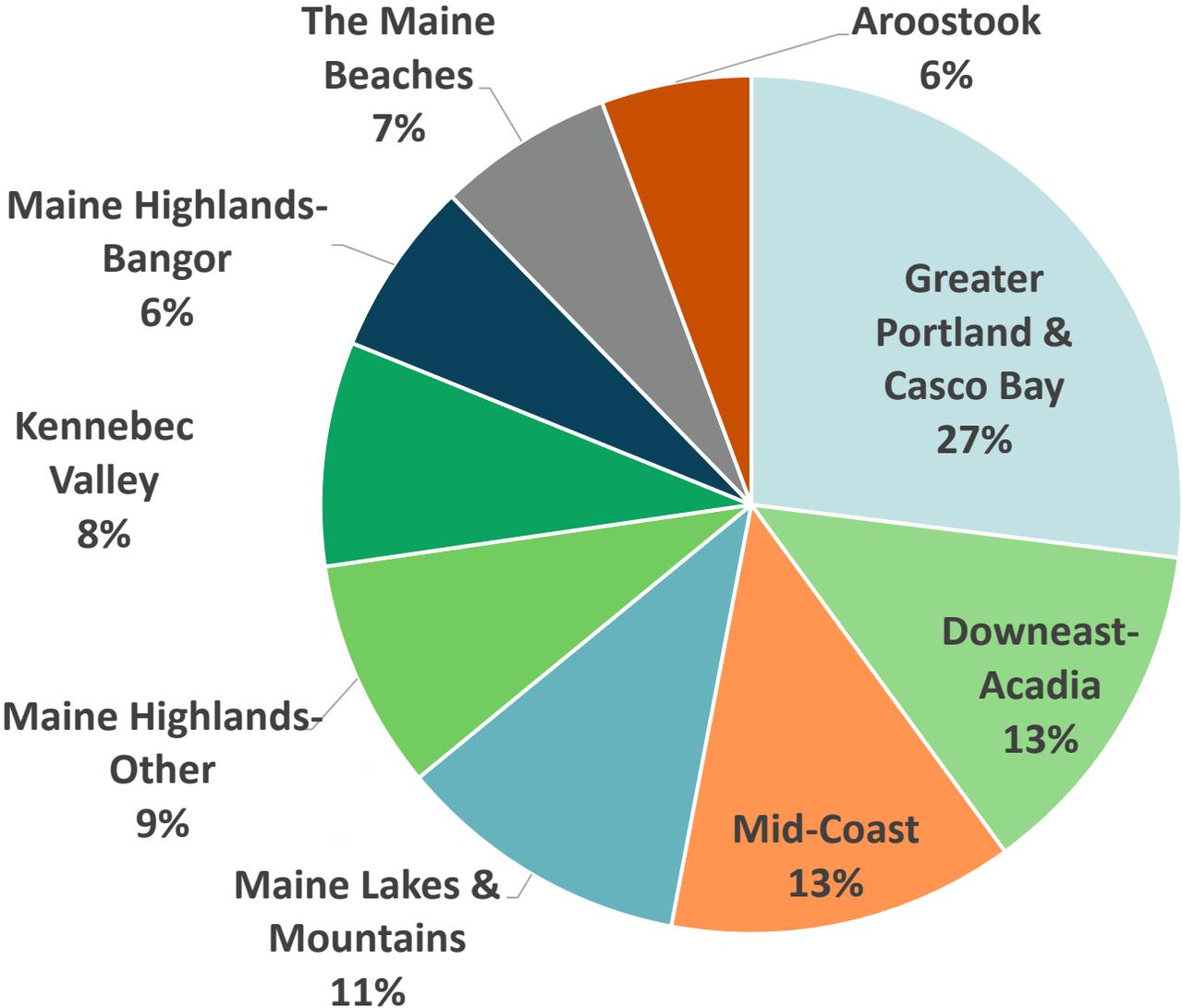
1,033 Responses – By Stakeholder
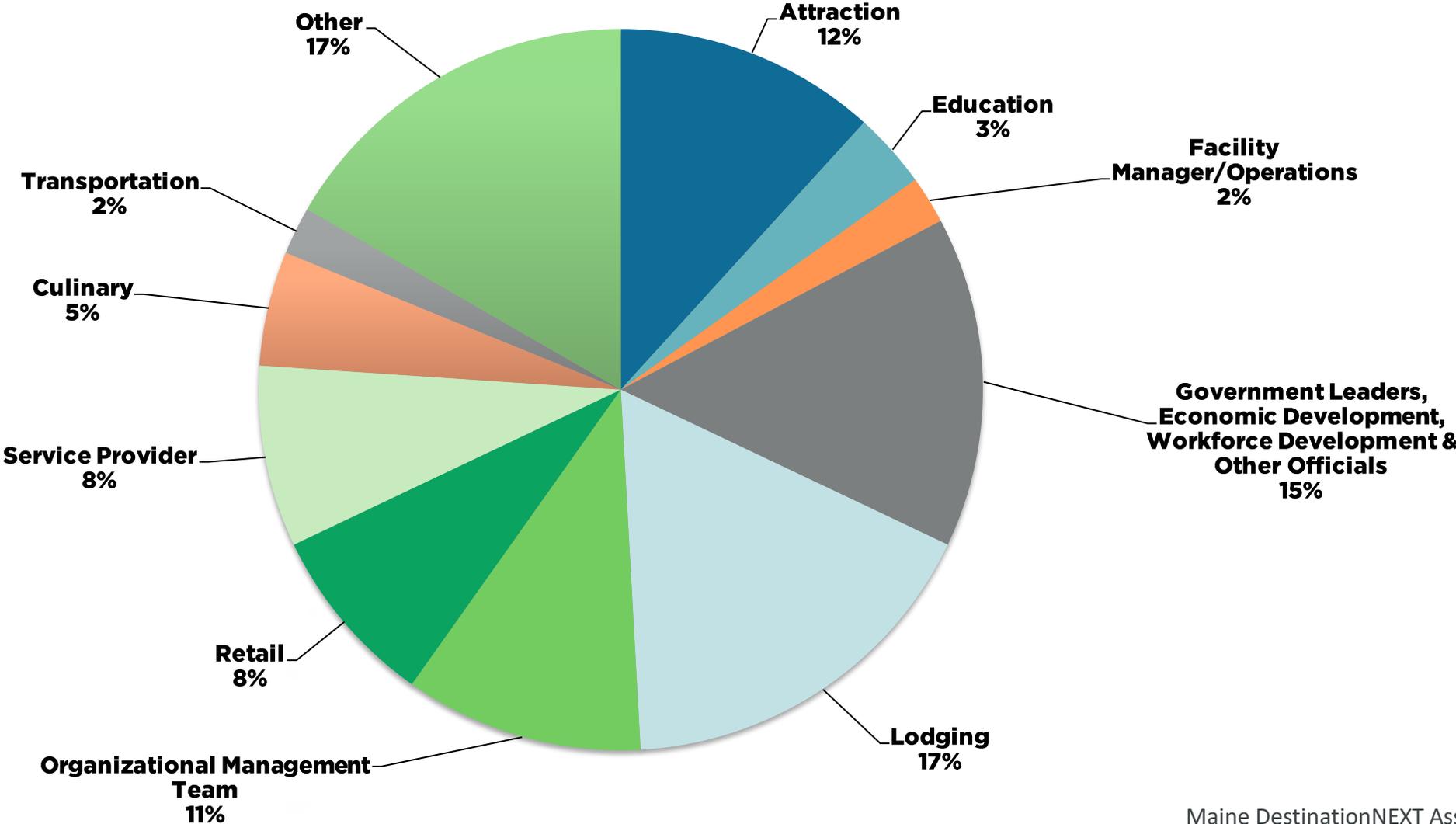
Age Demographic

18 - 34
10%

35 - 49
28%

50 - 64
41%

Over 65
21%

State of Maine Overall Assessment - Industry

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

United States Average

Developing Destinations

Established Destinations

Maine Average

EXPLORERS

MOUNTAINEERS

Weak Community Engagement
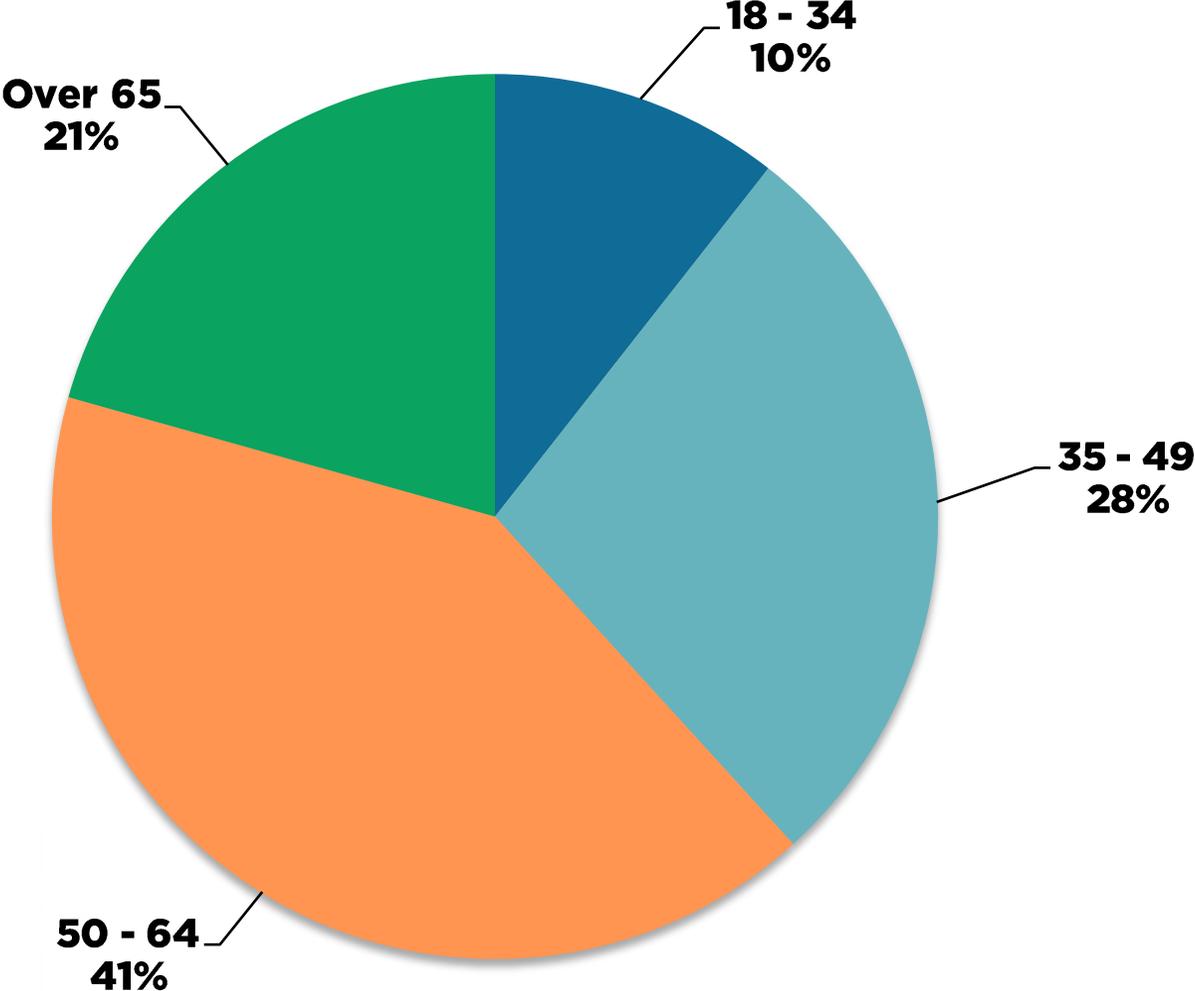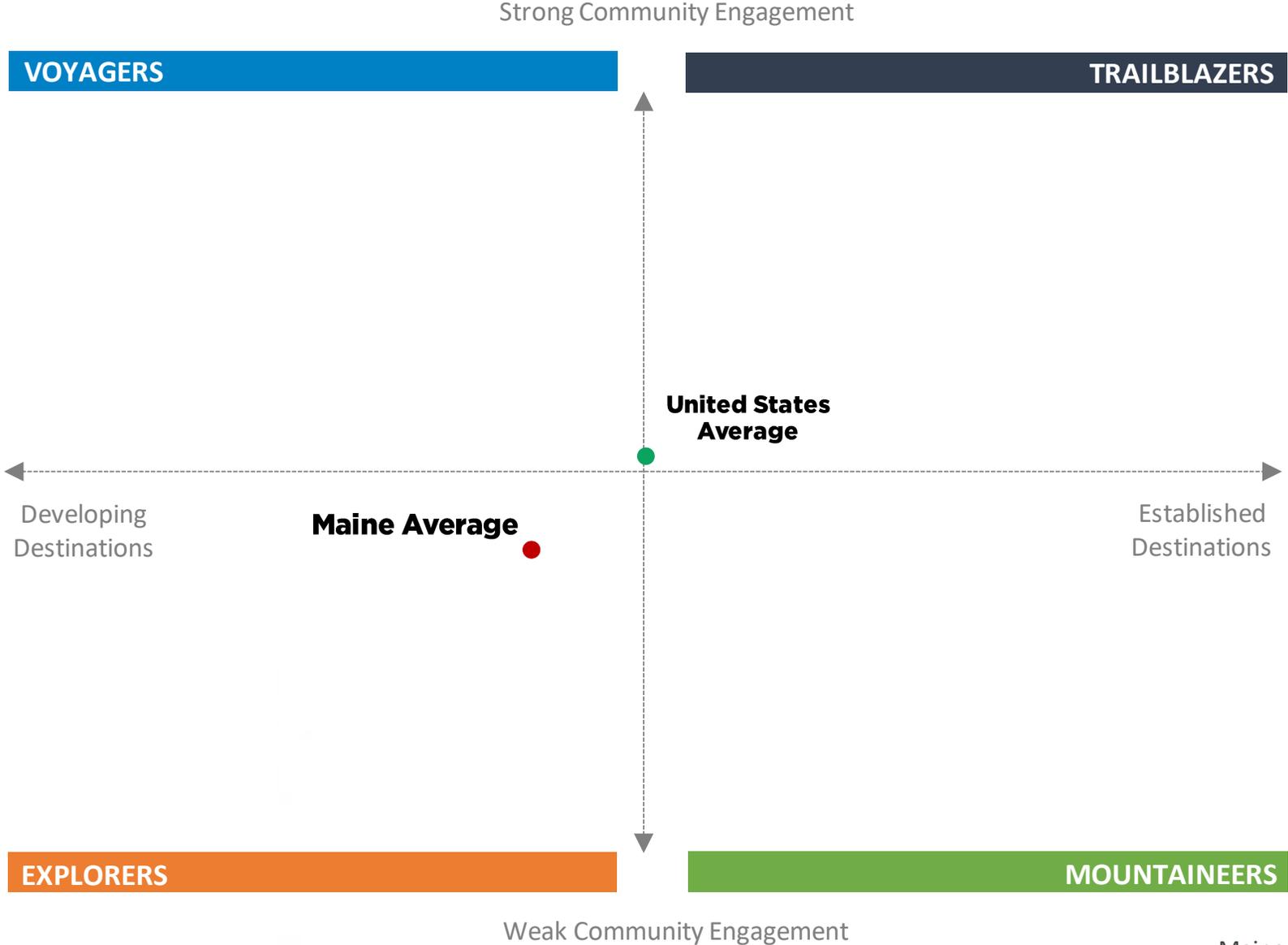
State of Maine Overall Assessment – Regions

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Developing Destinations

Established Destinations

Downeast-Acadia

Greater Bangor

Kennebec Valley

Greater Portland & Casco Bay

Maine Highlands

Aroostook

The Maine Beaches

Maine Average

Maine Lakes & Mountains

Mid-Coast

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

State of Maine Overall Assessment – Stakeholder Group

Strong Community Engagement

| VOYAGERS | TRAILBLAZERS |

Developing Destinations

Established Destinations

Government Leaders, Economic Development, Workforce Development & Other Officials

Organizational Management Team

Education

Culinary

Transportation

Attraction

Facility Manager/Operations

Other

Lodging

Retail

Service Provider

Maine Average

| EXPLORERS | MOUNTAINEERS |

Weak Community Engagement

State of Maine Overall Assessment – Age

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Maine Average

Developing
Destinations

18 - 34

50 - 64

35 - 49

Established
Destinations

Over 65

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Explorers

These DMO's and destinations desire an inspired tourism vision and activated community to make it happen.

Key Strategic Challenges

- **Rallying the community to work together towards a realistic vision and strategy**

- **Building community recognition and acceptance that transformational change is needed**

- **Implementing the strategy with limited resources**

Developing Destination
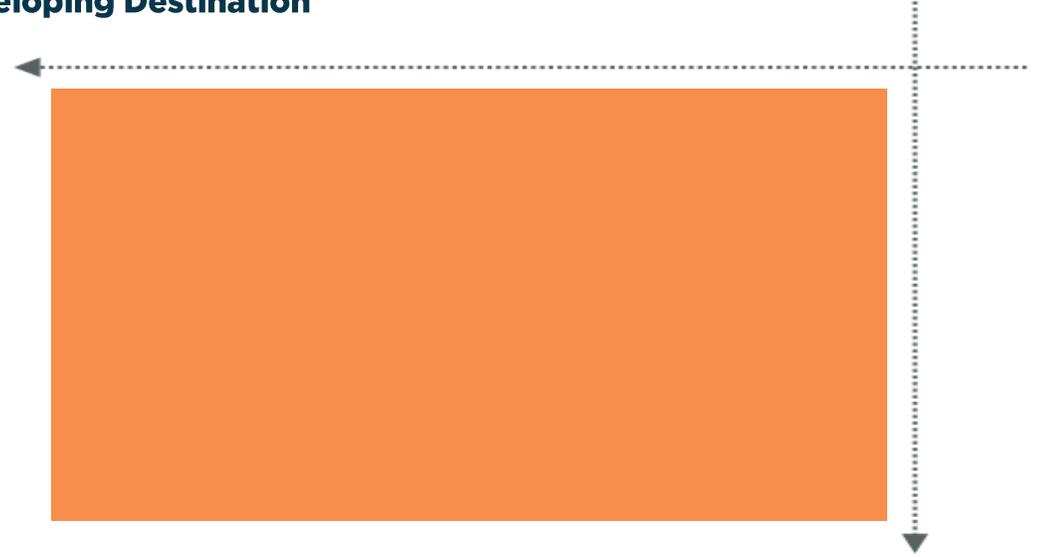
Weak Community Engagement

Becoming a Trailblazer
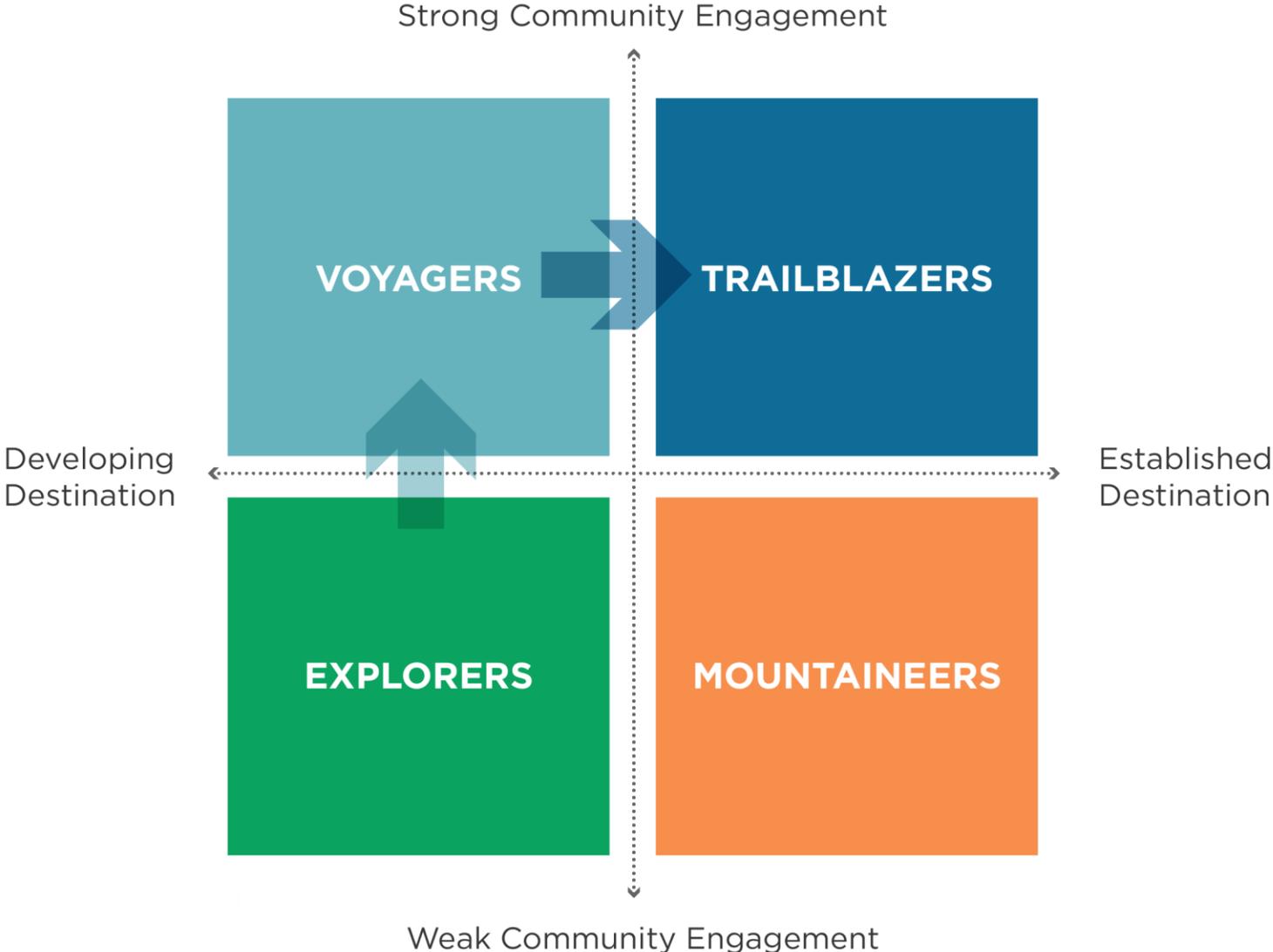
Destination Strength Rankings –
State of Maine

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Average	Standard Deviation	Industry Average	Maine Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.3%	1%	3.11	2.62	0.71
Accommodation	10.5%	10.9%	2%	3.54	3.06	0.71
Attractions & Entertainment	10.8%	10.8%	1%	3.65	3.49	0.75
Mobility & Access	10.1%	10.6%	2%	3.12	2.76	0.67
Destination Performance	10.0%	10.5%	1%	3.88	3.18	0.70
Sports & Recreation Facilities	9.4%	10.1%	1%	3.29	3.22	0.65
Brand	10.5%	9.8%	2%	3.49	3.42	0.57
Events	9.7%	8.9%	2%	3.63	3.27	0.70
Communication & Internet Infrastructure	10.1%	8.7%	2%	3.39	2.77	0.82
Air Access	9.2%	8.3%	2%	3.16	3.08	0.53

DESTINATION STRENGTH - 0	3.08
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCERNARIO	EXPLORERS

Note
Green shading signifies that the destination **outperformed** the industry average by greater than 0.2.
Yellow shading signifies that the destination **underperformed** the industry average by greater than 0.2 but less than 0.4.
Red shading signifies that the destination **underperformed** the industry average by greater than 0.4.

Destination Strength – Regional Report Card

Variable	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
	Perceived Performance (1-5 scale)									
Convention & Meeting Facilities	2.62	2.21	2.46	2.87	2.28	2.03	3.12	2.53	2.70	2.73
Accommodation	3.06	2.67	2.91	3.41	2.59	2.32	3.39	2.96	3.14	3.20
Attractions & Entertainment	3.49	2.83	3.35	3.95	3.11	2.87	3.20	3.18	3.83	3.59
Mobility & Access	2.76	2.84	2.81	2.85	2.65	2.60	2.89	2.67	2.63	2.73
Destination Performance	3.18	2.82	3.06	3.50	2.81	2.71	3.40	2.97	3.13	3.34
Sports & Recreation Facilities	3.22	3.39	3.09	3.35	3.22	3.09	3.47	3.29	2.91	2.95
Brand	3.42	3.36	3.49	3.47	3.22	3.31	3.41	3.35	3.41	3.58
Events	3.27	3.17	3.21	3.36	3.31	2.85	3.84	3.11	3.34	3.10
Communication & Internet Infrastructure	2.77	2.69	2.48	3.02	2.46	2.37	2.97	2.75	2.68	2.94
Air Access	3.08	2.66	2.95	3.35	2.80	2.64	3.21	2.93	3.20	3.23

DESTINATION STRENGTH - Maine Average	3.08
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO	EXPLORERS

Note
Green shading signifies that the region outperformed the destination average by greater than 0.2.
Yellow shading signifies that the region underperformed the destination average by greater than 0.2 but less than 0.4.
Red shading signifies that the region underperformed the destination average by greater than 0.4.

Community Support & Engagement –
State of Maine

Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Average	Standard Deviation	Industry Average	Maine Average	Standard Deviation
Local Community Support	10.2%	10.6%	4%	3.56	3.44	0.79
Industry Support	9.9%	10.3%	2%	3.81	3.50	0.83
Hospitality Culture	10.2%	10.3%	1%	3.71	3.42	0.96
Regional Cooperation	10.0%	10.1%	1%	3.76	3.38	0.86
Economic Development	10.2%	10.0%	1%	3.95	4.00	0.63
Workforce	10.1%	10.0%	2%	3.31	2.39	0.72
Effective Advocacy Program	10.2%	9.9%	1%	3.63	3.22	0.81
Membership Strength & Support	9.6%	9.9%	2%	3.76	3.34	0.79
Funding Support & Certainty	9.9%	9.7%	4%	3.36	2.50	0.87
Effective DMO Governance Model	9.6%	9.2%	2%	3.80	3.22	0.87

COMMUNITY SUPPORT & ENGAGEMENT - 0	3.25
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

RESULTING SCENRIO	EXPLORERS

Note
Green shading signifies that the destination outperformed the industry average by greater than 0.2.
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Red shading signifies that the destination underperformed the industry average by greater than 0.4.

Community Support & Engagement – Regional Report Card

Variable	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
	Perceived Performance (1-5 scale)									
Local Community Support	3.44	3.15	3.47	3.49	3.31	3.35	3.65	3.34	3.45	3.56
Industry Support	3.50	3.21	3.51	3.56	3.44	3.60	3.58	3.50	3.46	3.41
Hospitality Culture	3.42	3.63	3.28	3.61	3.17	3.02	3.62	3.22	3.47	3.35
Regional Cooperation	3.38	2.98	3.31	3.50	3.27	3.37	3.45	3.16	3.40	3.68
Economic Development	4.00	3.63	3.94	4.11	4.00	3.96	4.11	3.89	3.96	4.08
Workforce	2.39	2.77	2.18	2.40	2.56	2.52	2.75	2.44	2.05	2.10
Effective Advocacy Program	3.22	2.96	3.28	3.29	3.21	3.05	3.43	3.21	3.09	3.21
Membership Strength & Support	3.34	2.84	3.38	3.41	3.43	3.44	3.52	3.30	3.23	3.23
Funding Support & Certainty	2.50	2.01	2.30	2.68	2.43	2.33	2.58	2.36	2.45	2.99
Effective DMO Governance Model	3.22	2.73	3.11	3.31	3.31	3.17	3.62	3.18	3.21	3.01

COMMUNITY SUPPORT & ENGAGEMENT - Maine Average	3.25
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

RESULTING SCENARIO	EXPLORERS

Note
Green shading signifies that the region **outperformed** the destination average by greater than 0.2.
Yellow shading signifies that the region **underperformed** the destination average by greater than 0.2 but less than 0.4.
Red shading signifies that the region **underperformed** the destination average by greater than 0.4.

Key Takeaways - Maine

What one thing would help the region become a more productive visitor destination?

1. Advertising & marketing
2. Visitor amenities & product development
3. Transportation

Factors	Aroostook	Downeast-Acadia	Highlands-Greater Bangor	Highlands-Other	Greater Portland & Casco Bay	Kennebec Valley	Mid-Coast	Maine Lakes & Mountains	The Maine Beaches
Advertising & Marketing	✓	✓	✓	✓	✓	✓	✓	✓	✓
Visitor Amenities & Product Development	✓	✓	✓	✓	✓	✓	✓	✓	✓
Engagement & Regional Support				✓					
Attractions & Entertainment						✓			
Transportation	✓	✓	✓		✓		✓	✓	✓

Key Takeaways - Maine

What are the three biggest opportunities for expanding jobs and the economic benefits of the tourism industry?

1. Advertising, branding & marketing
2. Outdoor recreation & sports
3. Workforce

Opportunities	Aroostook	Downeast-Acadia	Highlands-Greater Bangor	Highlands-Other	Greater Portland & Casco Bay	Kennebec Valley	Mid-Coast	Maine Lakes & Mountains	The Maine Beaches
Outdoor Recreation & Sports	✓	✓		✓		✓		✓	
Advertising, Branding & Marketing	✓	✓	✓	✓		✓	✓	✓	
Accommodations				✓					
Conventions & Meetings					✓				
Food & Beverage						✓			
Attractions & Entertainment			✓						✓
Seasonality/Shoulder Seasons							✓		
Nature, Cultural, & Heritage Tourism	✓								
Workforce		✓			✓		✓		✓
Education & Training									
Planning & Experiential Product Development			✓					✓	✓
Transportation					✓				

Key Takeaways - Maine

List up to three markets that you think have the most growth potential in the next three years.

1. Food & beverage
2. Outdoor recreation
3. Nature/wellness

Markets	Aroostook	Downeast-Acadia	Highlands-Greater Bangor	Highlands-Other	Greater Portland & Casco Bay	Kennebec Valley	Mid-Coast	Maine Lakes & Mountains	The Maine Beaches
Food & Beverage		✓	✓	✓	✓	✓	✓	✓	✓
Outdoor Recreation	✓	✓	✓	✓	✓	✓		✓	
Nature/Wellness	✓		✓	✓			✓	✓	✓
Niche Tourism Markets					✓	✓			✓
Arts/Culture/Heritage Tourism	✓	✓					✓		

120 Responses

Pie chart of 120 responses by category:
- Attraction: 16%
- Education: 2%
- Government Leaders, Economic Development, Workforce Development & Other Officials: 8%
- 0%
- Lodging: 27%
- Organizational Management Team: 12%
- Retail: 10%
- Service Provider: 7%
- Culinary: 2%
- Other: 14%

Age Demographic

18 - 34
3%

35 - 49
20%

50 - 64
42%

Over 65
35%

Downeast - Acadia Overall Assessment - Industry

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

United States Average

Developing Destinations

Established Destinations

Maine Average

Downeast-Acadia Average

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Downneast - Acadia Overall Assessment – Stakeholder Group

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Developing Destinations

Established Destinations

Service Provider

Organizational Management Team

Lodging

Government Leaders, Economic Development, Workforce Development & Other Officials

Downeast-Acadia Average

Other

Attraction

Retail

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Downeast - Acadia Overall Assessment – Age

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Developing Destinations

Established Destinations

Over 65

18 - 34

50 - 64

35 - 49

Downeast-Acadia Average

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Destination Strength Rankings – Downeast - Acadia

	Relative Importance	Perceived Performance
Convention & Meeting Facilities	1st	10th
Attractions & Entertainment	2nd	2nd
Accommodation	3rd	7th
Mobility & Access	4th	8th

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Downeast-Acadia Average	Standard Deviation	Industry Average	Downeast-Acadia Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.3%	1%	3.11	2.46	0.77
Attractions & Entertainment	10.8%	11.0%	1%	3.65	3.35	0.67
Accommodation	10.5%	10.9%	2%	3.54	2.91	0.65
Mobility & Access	10.1%	10.7%	1%	3.12	2.81	0.64
Destination Performance	10.0%	10.5%	1%	3.88	3.06	0.70
Sports & Recreation Facilities	9.4%	10.1%	1%	3.29	3.09	0.67
Brand	10.5%	9.7%	2%	3.49	3.49	0.68
Events	9.7%	9.1%	1%	3.63	3.21	0.66
Communication & Internet Infrastructure	10.1%	8.4%	2%	3.39	2.48	0.77
Air Access	9.2%	8.3%	1%	3.16	2.95	0.53

DESTINATION STRENGTH - Downeast-Acadia	2.98
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO	EXPLORERS

Note
Green shading signifies that the destination **outperformed** the industry average by greater than 0.2.
Yellow shading signifies that the destination **underperformed** the industry average by greater than 0.2 but less than 0.4.
Red shading signifies that the destination **underperformed** the industry average by greater than 0.4.

Convention & Meeting Facilities

■ Where possible, hotels/other meeting venues take full advantage of the views

■ Has good, unique off-site venues for special events

■ Has the necessary convention, meeting, and trade show facilities to compete today

■ Offers an abundance of professional and experienced convention and/or meeting services suppliers

■ Convention center meeting and networking space is well branded

■ Has the necessary convention, meeting, and trade show facilities to compete for the next 25 years
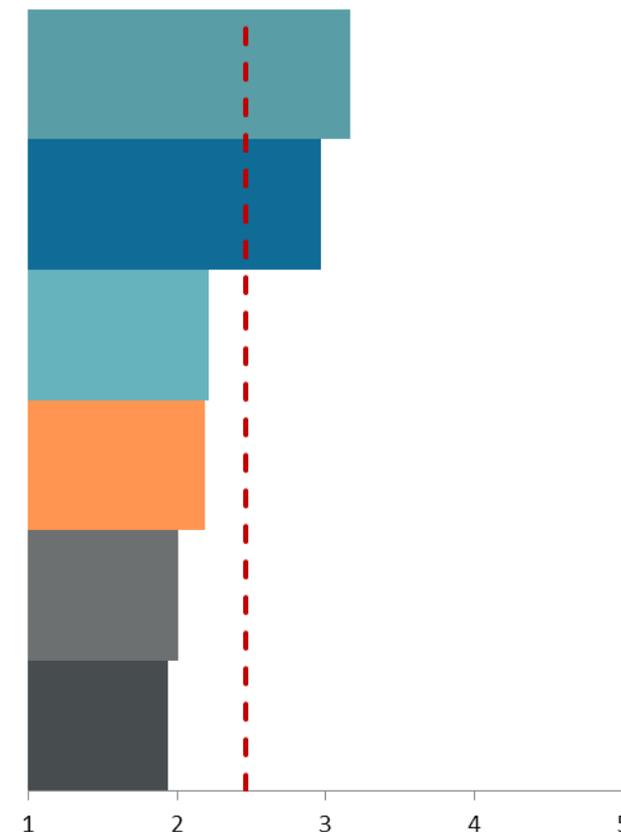
Note
Red Dashed Line signifies the destination average for this individual variable.

Attractions & Entertainment

- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.

- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)

- Has high-quality and wide-ranging arts and cultural attractions

- Has the type of large, famous attractions that cause people to stay (or plan to stay) an extra day

- Has unique and high-quality dining options

- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors

- Towns and cities offer diverse and high-quality shopping opportunities

- Suburban and/or rural areas offer diverse and high-quality shopping opportunities
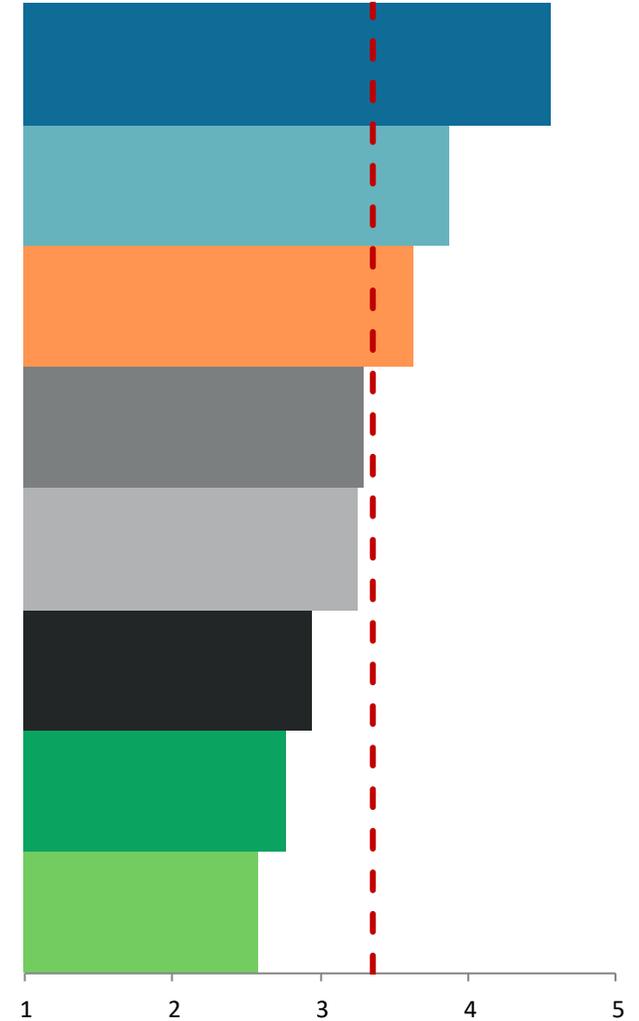
Note
Red Dashed Line signifies the destination average for this individual variable.

Accommodation

- Offers a diversity of accommodation price options
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Has adequate hotel accommodations capacity
- The location and proximity of accommodation options in the region meets visitor needs
- Has a healthy presence of well-known brand name hotels
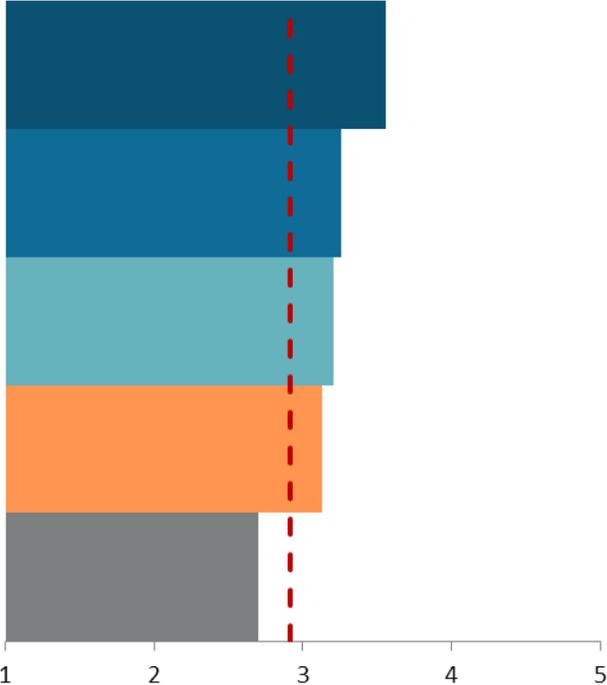
Note
Red Dashed Line signifies the destination average for this individual variable.

Mobility & Access

- ■ There are a number of sufficient and visible information centers available to tourists
- ■ Has great directional signage and highways that make it easy to get around
- ■ Has adequate water access that makes it easy for visitors to get around
- ■ Has adequate bike paths/pedestrian walkways that makes it easy for visitors to get around
- ■ Roads can easily handle residents, businesses and visitor traffic throughout the year
- ■ Provides good access and mobility for those with disabilities
- ■ Has adequate public transportation that makes it easy for visitors to get around
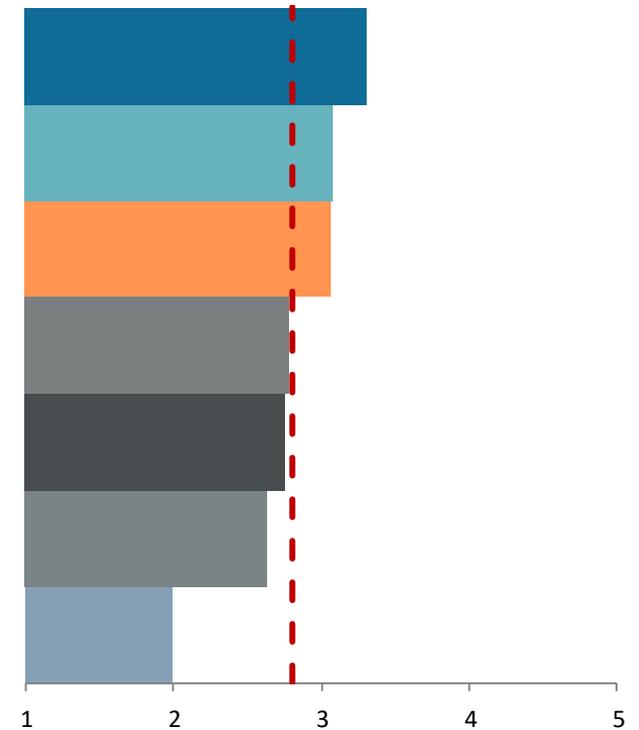
Note
Red Dashed Line signifies the destination average for this individual variable.

Destination Performance

- Is experiencing a positive growth in overnight visitation
- Hotels are performing well (e.g. Occupancy, RevPAR)
- Tourism industry performance is adequately measured and tracked
- The tourism industry does a good job at communicating the performance and economic impact to the public
- Is successfully attracting meetings and conventions
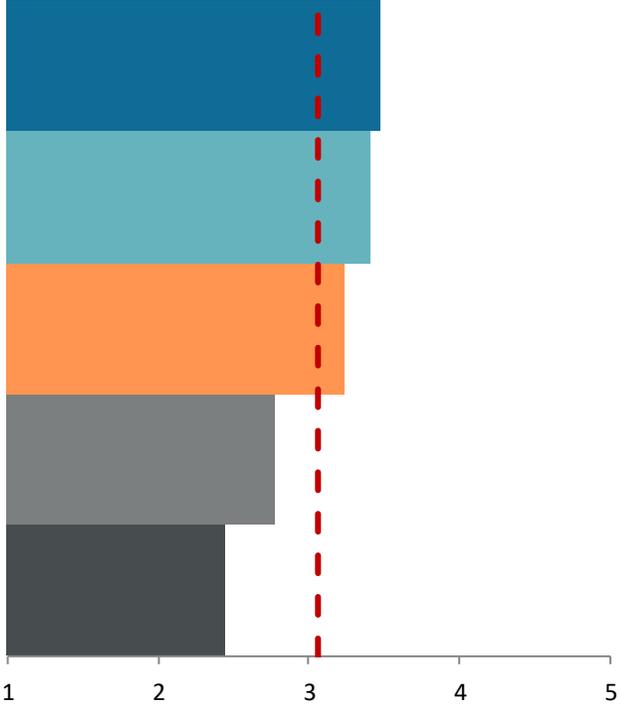
Note
Red Dashed Line signifies the destination average for this individual variable.

Sports & Recreation Facilities

- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- The Maine Sports Commission is a useful resource and is properly utilized throughout the region
- Leadership representing sports and recreational facilities are engaged and helpful in pursuing recreational and sporting events for the region
- Has the sports fields and availability to host major amateur and/or collegiate sporting events
- Has the venues to host major professional sporting events
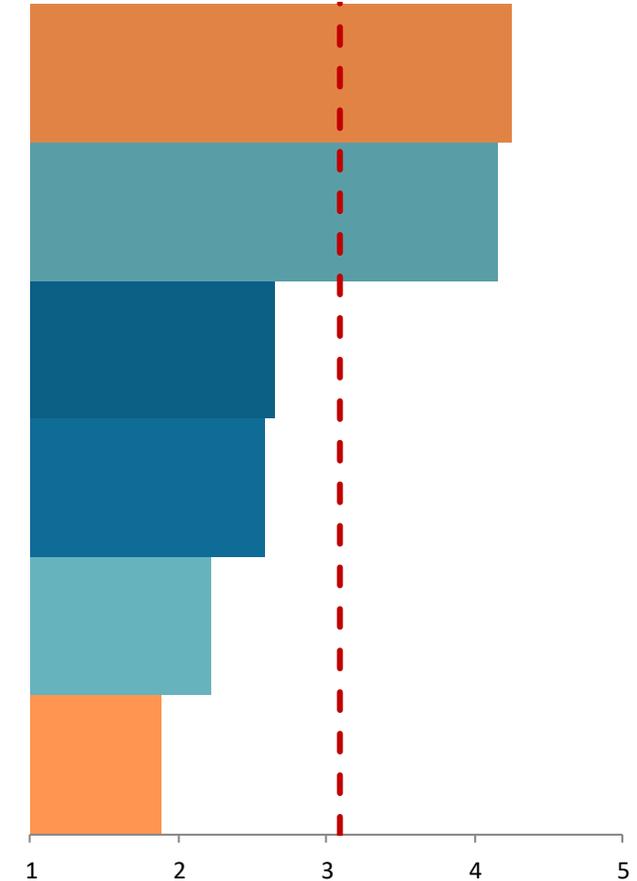
Note
Red Dashed Line signifies the destination average for this individual variable.

Brand

- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for being environmentally conscious and sustainable
- Is known for having a lot of things to see and do
- Appeals to a diverse range of visitors
- Has an effective region-wide marketing message
- Is prepared for international tourism with adequate translations and guides
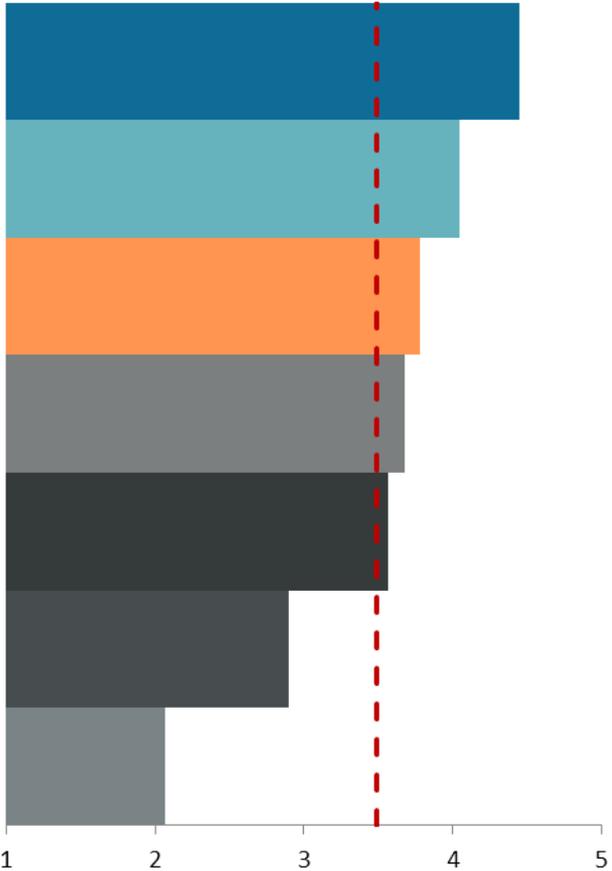
Note
Red Dashed Line signifies the destination average for this individual variable.

Events

- Has an abundance of parks and outdoor spaces for handling special events
- Offers major events that attract non-local visitors
- The citizens of the region are supportive of hosting major sporting/national or international events
- Government is cooperative and supportive in attracting and hosting major events
- Local venues produce numerous public/lifestyle shows throughout the year for residents to enjoy
- Has diverse and quality facilities/venues with capacity/availability to host major events
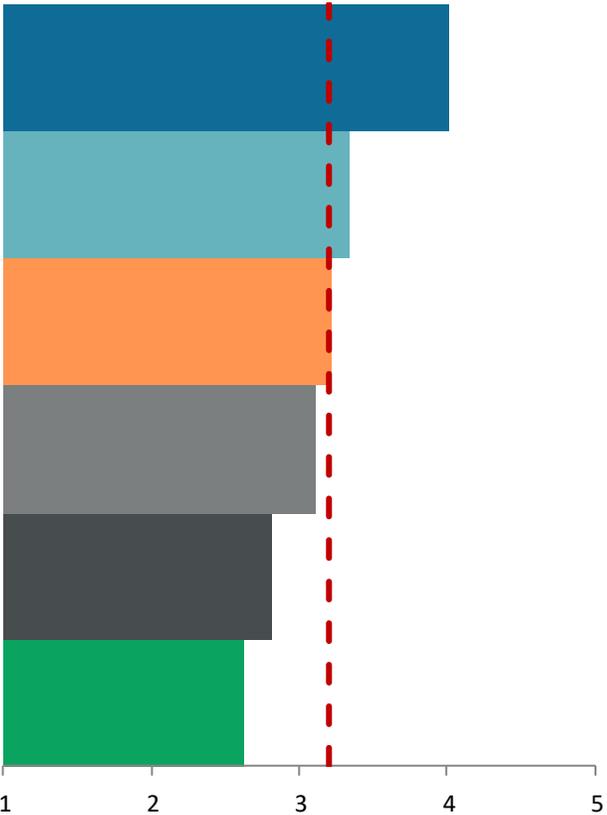
Note
Red Dashed Line signifies the destination average for this individual variable.

Communication & Internet Infrastructure

- Tourism industry uses and leverages social media to support the brand and market
- There is substantial Wi-Fi access in region's meeting/convention facilities
- Offers sufficient free Wi-Fi in outdoor/public areas with high visitor traffic
- Businesses have access to good broadband capacity to be able to run their businesses effectively
- There is reliable mobile phone service covering all of the region's attractions
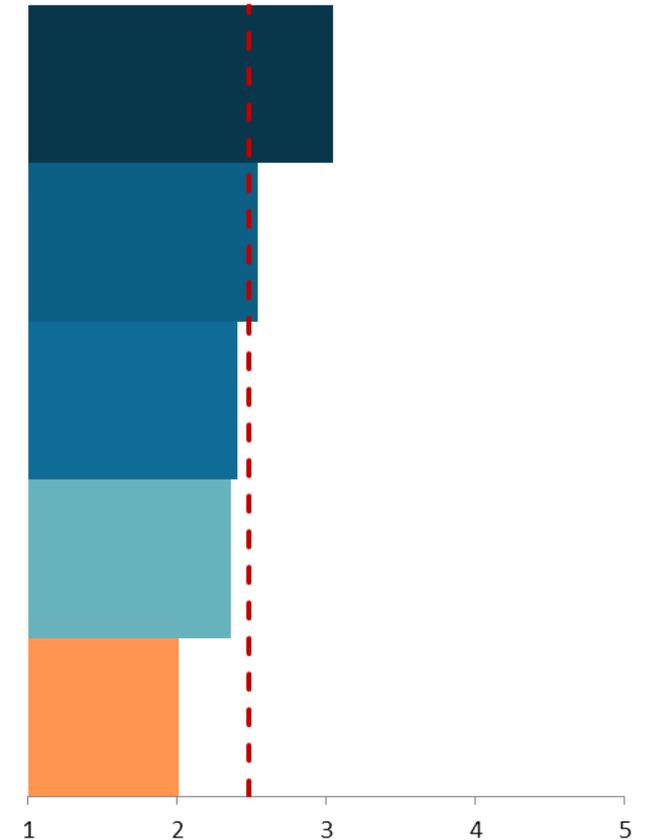
Note
Red Dashed Line signifies the destination average for this individual variable.

Air Access

- Local airport has the facilities to grow tourism in the region
- Local airport offers a "sense of place" that supports the brand and promotes the region and state
- Has adequate domestic air access through airports (number of flights/capacity)
- Has adequate international air access through airports (number of flights/capacity)
- Has adequate domestic air access through airports (# of carriers/low-cost options)
- Has adequate international air access through airports (# of carriers/low-cost options)

Note
Red Dashed Line signifies the destination average for this individual variable.

Community Support & Engagement – Downeast - Acadia

	Relative Importance	Perceived Performance
Local Community Support	1st	3rd
Hospitality Culture	2nd	7th
Regional Cooperation	3rd	5th
Economic Development	4th	1st

Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Downeast-Acadia Average	Standard Deviation	Industry Average	Downeast-Acadia Average	Standard Deviation
Local Community Support	10.2%	10.9%	5%	3.56	3.47	0.85
Hospitality Culture	10.2%	10.3%	1%	3.71	3.28	1.12
Regional Cooperation	10.0%	10.1%	2%	3.76	3.31	0.76
Economic Development	10.2%	10.1%	1%	3.95	3.94	0.65
Industry Support	9.9%	10.0%	1%	3.81	3.51	0.87
Workforce	10.1%	9.8%	1%	3.31	2.18	0.69
Funding Support & Certainty	9.9%	9.8%	1%	3.36	2.30	0.88
Effective Advocacy Program	10.2%	9.8%	1%	3.63	3.28	0.82
Membership Strength & Support	9.6%	9.8%	1%	3.76	3.38	0.81
Effective DMO Governance Model	9.6%	9.3%	1%	3.80	3.11	0.82

COMMUNITY SUPPORT & ENGAGEMENT - Downeast-Acadia	3.19
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

|	
RESULTING SCERNARIO	EXPLORERS

Note
Green shading signifies that the destination **outperformed** the industry average by greater than 0.2.
Yellow shading signifies that the destination **underperformed** the industry average by greater than 0.2 but less than 0.4.
Red shading signifies that the destination **underperformed** the industry average by greater than 0.4.

Local Community Support

- ■ The region's tourism industry has business support

- ■ The region's tourism industry gets positive media coverage

- ■ Stakeholders find value in partnerships that include other tourism regions
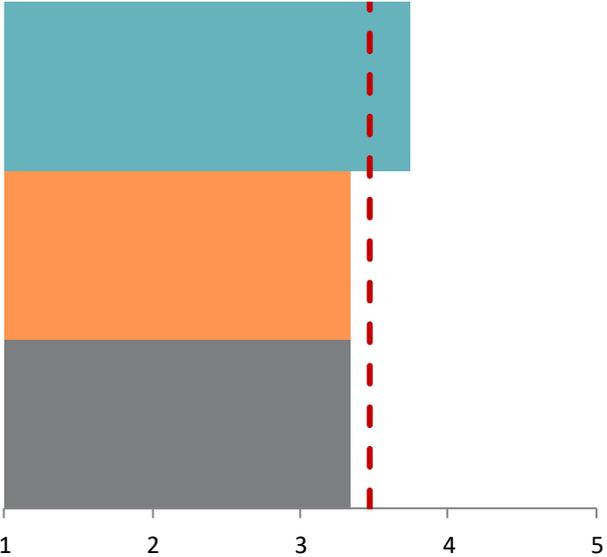
Note
**Red Dashed Line signifies the destination average for this individual variable.**

Hospitality Culture

■ The region has a reputation for offering high-quality customer service

■ The region has a hospitality-minded culture that welcomes visitors and improves their experience
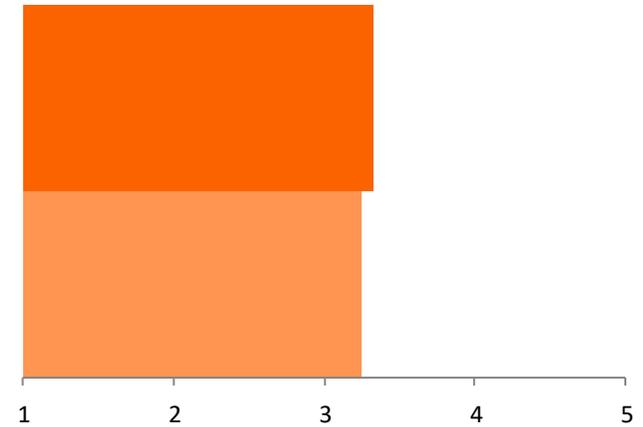
Regional Cooperation

■ Tourism marketing efforts have broad economic benefits across the region

■ There is broad collaboration and coordination among tourism partners in the region
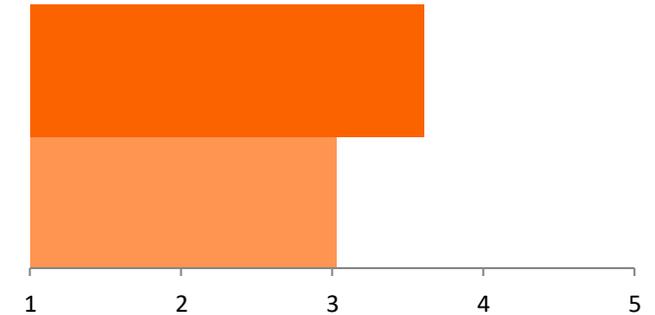
Economic Development

■ Tourism is identified as a key economic driver for the region

■ Tourism industry has a good working relationship with local chambers and/or economic development agencies

■ Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business development
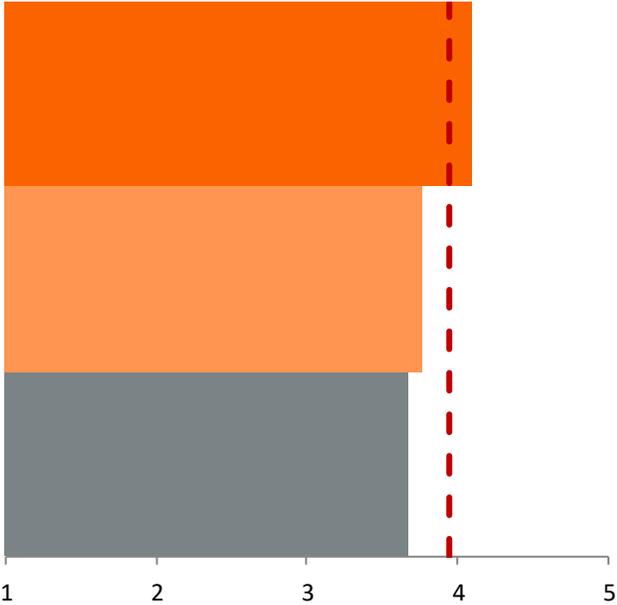
Note
Red Dashed Line signifies the destination average for this individual variable.

Industry Support

■ Tourism industry leaders and stakeholders are supportive of the regional tourism industry

■ Tourism industry leaders and stakeholders are investing in activities
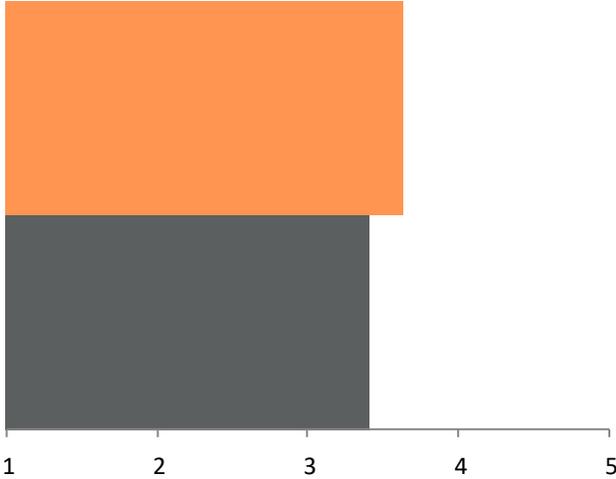
Note
Red Dashed Line signifies the destination average for this individual variable.

Workforce

■ The region has a strong base of hospitality education programs

■ The region's workforce is stable and has a positive labor relations environment

■ The increase in rents and home prices has not affected the industry in terms of attracting employees

■ The region's hospitality industry is able to attract and retain a high-quality workforce

■ The H2B visa restrictions have not affected businesses that cater to tourists or the hospitality industry workforce
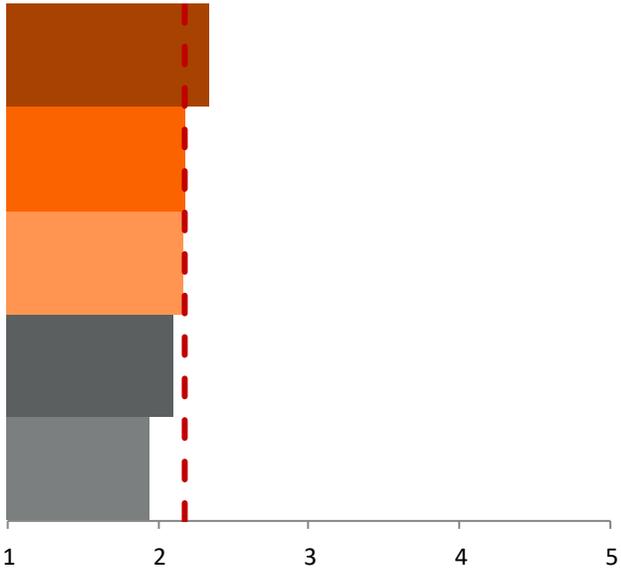
Note
Red Dashed Line signifies the destination average for this individual variable.

Funding Support & Certainty

■ There is stable funding to attain tourism mission of growth of economic activity and improved quality of life

■ There is sufficient funding to attain tourism mission of growth of economic activity and improved quality of life
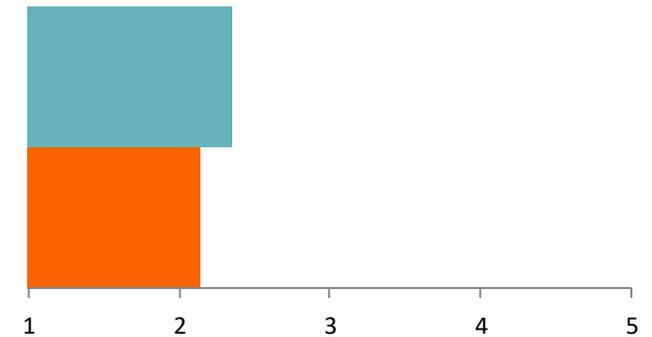
Effective Advocacy Program

■ Local government is supportive of the tourism industry

■ Local government relies on tourism stakeholders for input on the destination

■ Tourism advocacy programs are successful in educating/informing government policy and regulatory matters
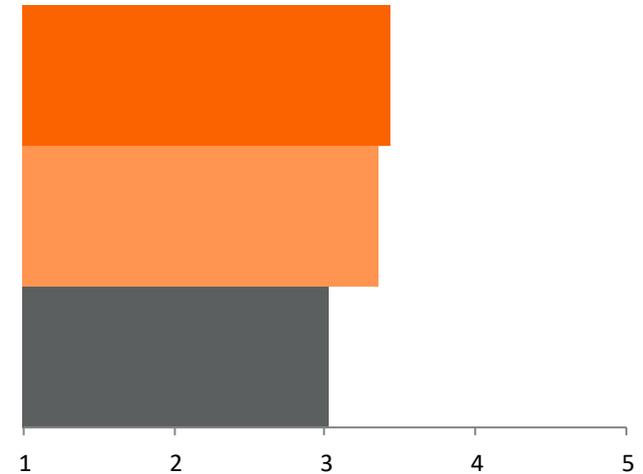
Stakeholder Strength & Support

- Stakeholders are active, engaged and supportive of tourism development

- Stakeholders find value in region-wide partnerships

- Stakeholders are active, engaged and supportive of tourism marketing

- Stakeholders find value in partnerships that include other tourism regions
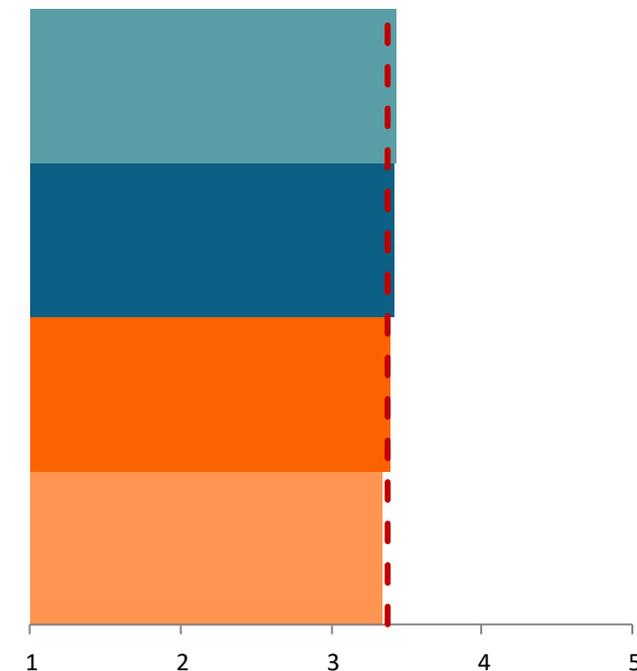
Note
Red Dashed Line signifies the destination average for this individual variable.

Effective Destination Organization Governance Model

■ Local leaders are engaged in the governance structure of organizations

■ Organizations that impact tourism have an effective organizational structure
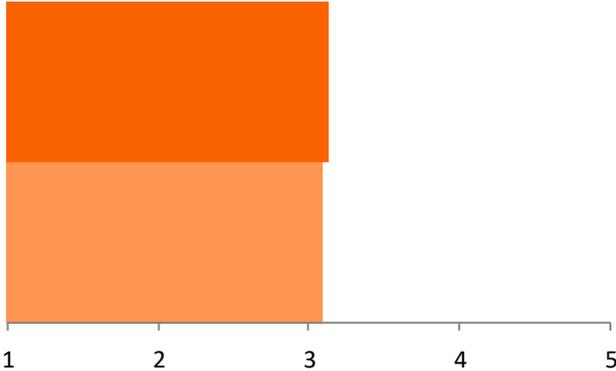
Key Takeaways

- **Currently in Explorers quadrant with below industry average destination strength and community support & engagement**

- **There is similar alignment between stakeholder groups on the perception of the destination**

Destination Opportunities

- Meeting facilities
- High-quality shopping
- Unique & vibrant neighborhoods
- Iconic attractions
- Public transportation
- Communicate economic impact of tourism
- Sporting event venues
- Region-wide marketing message
- Mobile cell coverage
- Air access

Community Support & Engagement Opportunities

- Funding
- Regional collaboration
- Workforce

What one thing would help the region become a more productive visitor destination?

Transportation Infrastructure (24%)

- Better comprehensive public transportation system

- better parking or movement of tourists

- Improved bicycle lanes/shoulders along roadways

- Expansion of the islander bus routes

- Improved infrastructure, such as, improvement on roads , bridges, public bathrooms, parking, etc., knowing that funding for these things come from various sources

Advertising, Marketing, PR & Branding (24%)

- Better marketing of the events in our area

- Washington county's tourism industry suffers from it's regional association with the Bar Harbor/Acadia NP area. "Downeast" needs to be a separate destination to allow Washington county's unique brand to start working for itself

- Unified, coordinated marketing with consistent messaging and graphic identity

- Marketing-to educate the public on what Maine has to offer

- Coordination of marketing efforts that would inform potential visitors of the value of travelling and staying is the local area

- Consolidation of area information - one go to spot for maps, area events, featured businesses

Visitor Amenities & Experiential Product Development (18%)

- Making my region (Machias Bay area) more tourist friendly. Currently it is a drive THROUGH destination and needs to be come a drive TO destination with all of the natural beauty in the area

- Increase creative and historic attractions

- Become more accessible to foreign travelers. Create a more welcoming linguistic friendly tourism environment

- Balance between natural beauty/conservation and commercial pursuits

- An increase in local restaurants and shops that would draw people to smaller towns (i.e., not just Bar Harbor)

What are the biggest opportunities for expanding jobs and the economic benefit of the tourism industry?

Branding, Advertising, & Marketing (13%)

- Authenticity

- Growing interest in lesser visited destinations

- Growing tourism destination that is expanding away from Bar Harbor! More options for growth nearby

- Marketing of inland beauty & opps, including ecotourism or 'retreat' offering

- Promoting day trippers from areas like Bangor, Ellsworth and St. John NB

- Updating online presence for aging business models

Outdoor Recreation (12%)

- A scenic and unique destination multi-day hiking trail

- Providing support services for Adventure/Authentic Exp. tourists

- Improve opportunities for non motorized users of Sunrise Rail Trail to enjoy it. EG-improve surface for bike riding, set ski tracks and educate motorized users to avoid them when possible

- Guides/itineraries to help people access our many assets

Workforce & Housing Availability (12%)

- Ownership of industry by employees

- Lower minimum wage for tipped workers

- Housing for workers - most available properties are on Airbnb or VRBO because they are more lucrative to the owners

- Affordable housing to bring in staff from other Maine regions that have no jobs available

What are the top tourism issues to address?

Transportation Infrastructure (32%)

- Regional transportation

- Signage

- Road infrastructure

- Parking/Public Transportation

- More transportation options to/in popular areas, like the shuttles in Acadia

- Cruise ship management

Advertising, Marketing & Promotion (15%)

- No clear description of event postings

- Ease of finding how to access interesting places Downeast -- maps, materials, national stories

- Better advertising for interior Maine, including groups of businesses, not focusing on just certain ones

- Better advertisement of our local area to show what we have to offer and signage

- Awareness of the beauty of the area

Workforce Availability & Housing (12%)

- Short term housing for seasonal workers

- Better statewide marketing for seasonal employment

- Affordable Employee Housing

- Lack of motivated labor force

List 3 markets that have the most growth potential in the next 3 years

Outdoor Recreation (20%)

• Sunrise trail

• Outdoor adventure - kayaking, canoeing, cycling

• National Park enthusiasts - drawing Acadia crowd further east

• Campers/explorers

• Adventure tourism (people coming to region to participate in a variety of outdoor experiences)

• Recreation: bicycle, water craft rentals

• Adventure - Eco Hiking Biking Paddling

Culinary & Micro-Breweries/Agritourism (18%)

• Beer & wine trails

• Shellfish farming

• Restaurant/food trucks

• Culinary - local flavors - catch your own lobster

• Culinary tourism - tours for foodies at places where gourmet foods and beverages are made

• Hands on Experiences- culinary/ cultural

Arts, Cultural & Heritage (16%)

• Art gallery / sculpture trail tours

• Creative economy events (film, dance, art)

• Cultural Experience Tourism

• Hands on art making

• Historical and heritage type of travel

• Marine tourism from MDI, mid coast, Portland.....

• Interactive cultural (in natural resources economies)

How will the legalization of marijuana positively or negatively affect the region?

Positive (39%)

- Absolutely Positive. Great potential for increased tourism. Connect with MOFGA. Organic small lot marijuana!

- Will have positive economic impact, especially for cruise ship visitors

- Positive - will bring new businesses and new visitors, more taxes for the state

- I suspect a positive economic impact but it must be managed safely and effectively by the state and local municipalities. Opportunities exist for many new businesses which could drive commerce and visitation.

Negative (35%)

- Guests think that this is okay smoke in rooms this is becoming a problem

- Workplace challenges will increase undoubtedly and the image of our town will be changed for the worse

- My opinion is that legalization of Marijuana will negatively affect the region. I categorize it with an over abundant and unhealthy use of tobacco and alcohol. I do not see this industry as a worthy companion to places where experiences in nature, active enjoyment of the out of doors, enjoyment and appreciation of historical, culinary, adventure experiences are primary offerings. I do not see it as a quality part of locations and experiences that are wholesome, family oriented, activity based, and offer experiences that have depth, are memorable, and inspire visitors to experience, remember and share great travel information and memories

Neutral/Minimal Impact (13%)

- Probably no net loss or gain

- Mixed feelings about impact

- I happen to think it will have a neutral effect on the region

- Neutral. Most visitors to Downeast Maine are not coming here to access marijuana

Transformational Opportunities

#1: Broadcast to Engagement
Interacting with & leveraging the new marketplace

#2: Brand Building
Building & protecting the destination brand

#3: Collaboration & Partnerships
Evolving the DMO business model

Thank You!

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