

DESTINATION NEXT

Maine Statewide Assessment - Bangor

June 4, 2018

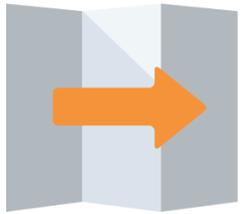


Paul Ouimet

DestinationNEXT

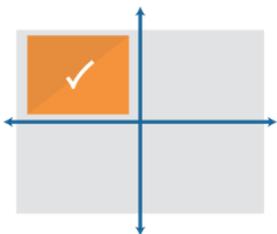
Vision:

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

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

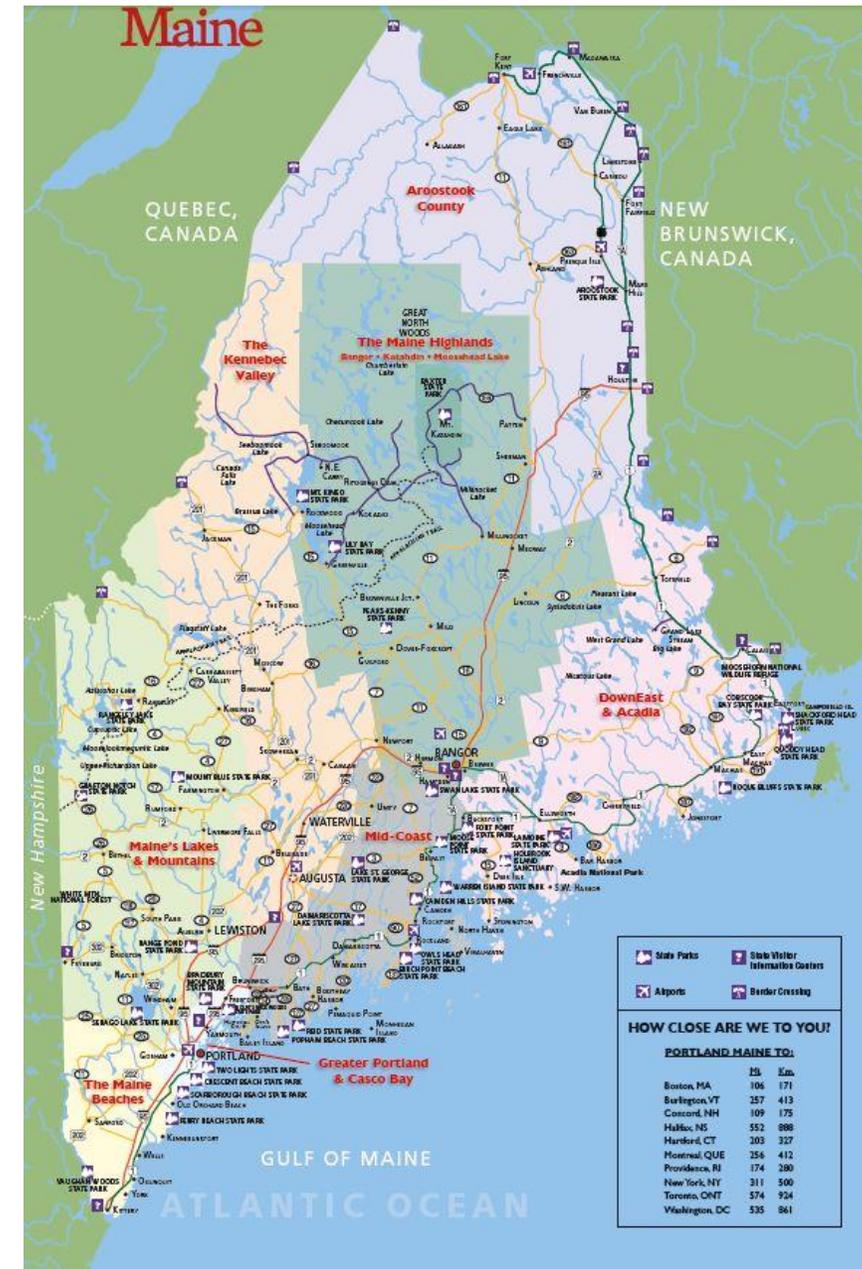
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

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

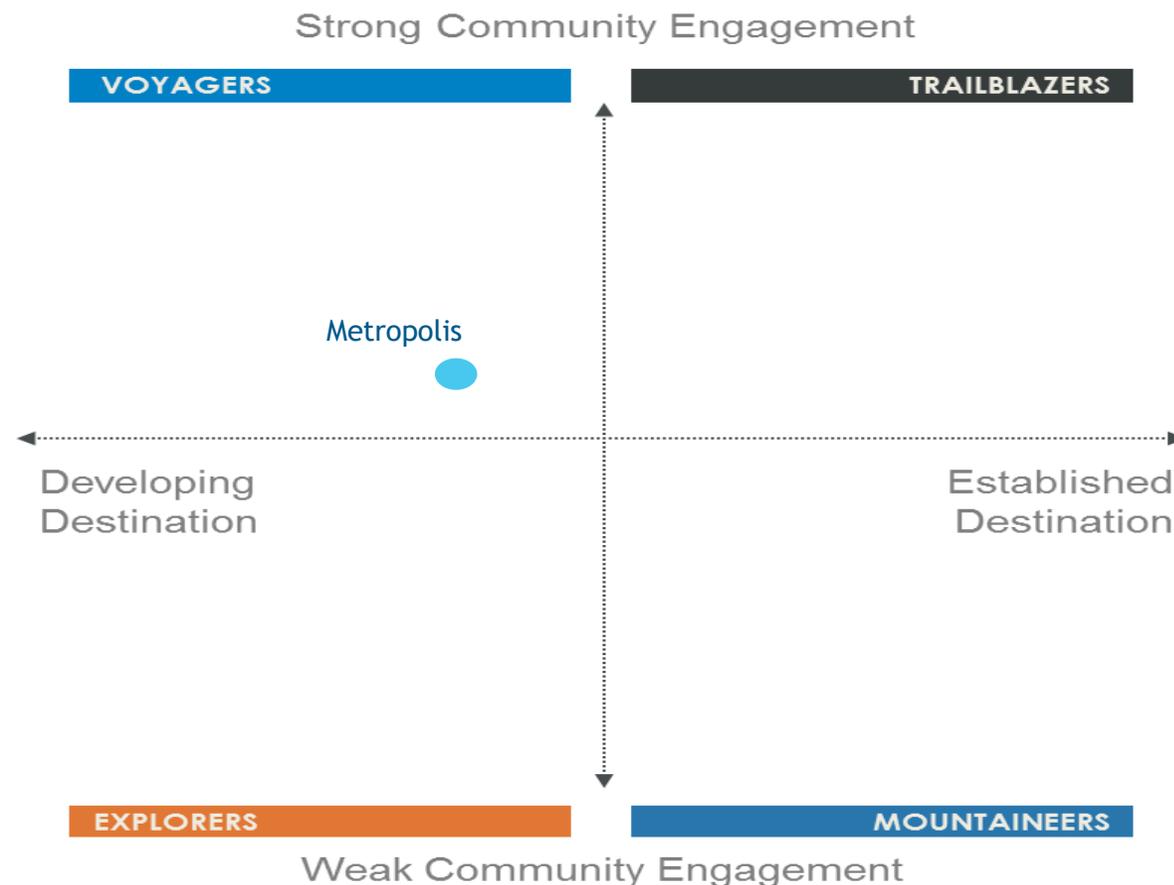
Scenario Model



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



Destination Strength Variables



**Destination
Performance**



Brand



Accommodation



**Attractions and
Entertainment**



**Conventions & Meeting
Facilities**



Air Access



Events



**Sporting and
Recreation Facilities**



**Communication &
Internet Infrastructure**

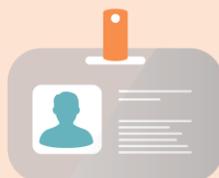


Mobility and Access

Community Support & Engagement Variables



**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



70

underway or
planned,
including 4 other
countries



60

in discussions,
including
14 other countries

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

Dominican Republic, El
Salvador, Ecuador
South Africa

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

Canada



Latin America



Europe



Asia/Australia



Regional Assessments



**Northwest Florida
Tourism Coalition**

**South Africa
Convention Bureau**

Global **Results**

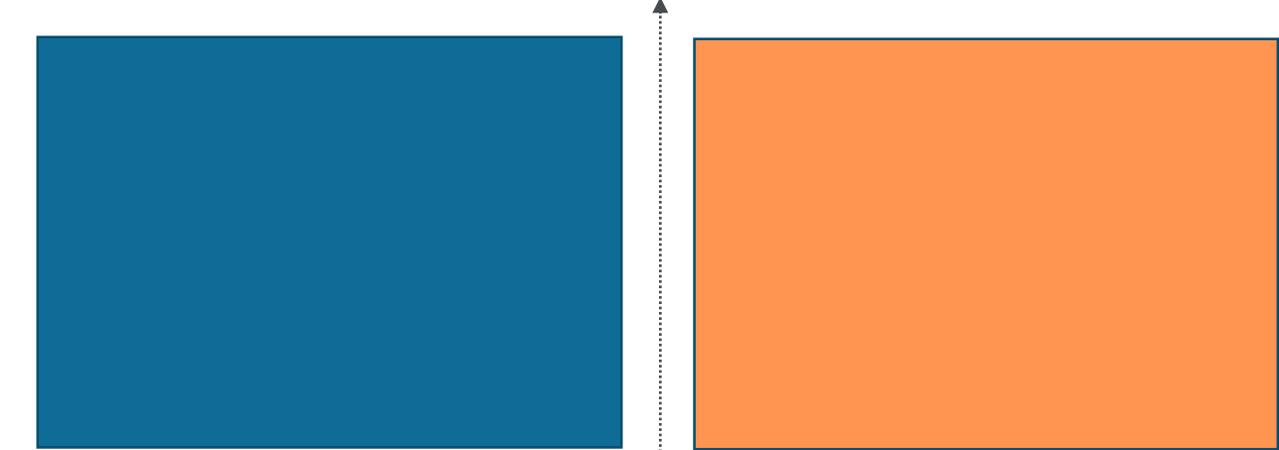
Scenario Model

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

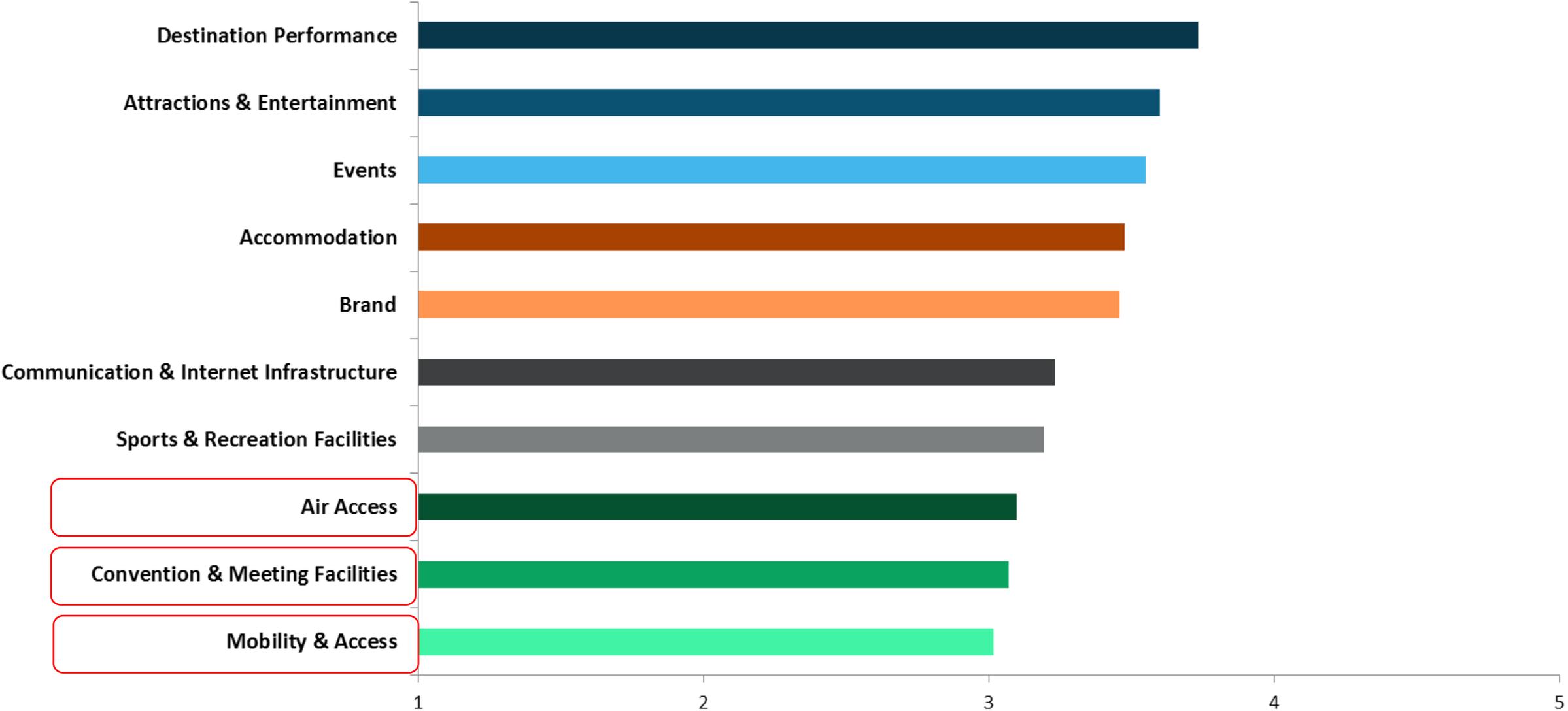
3rd



Accommodation

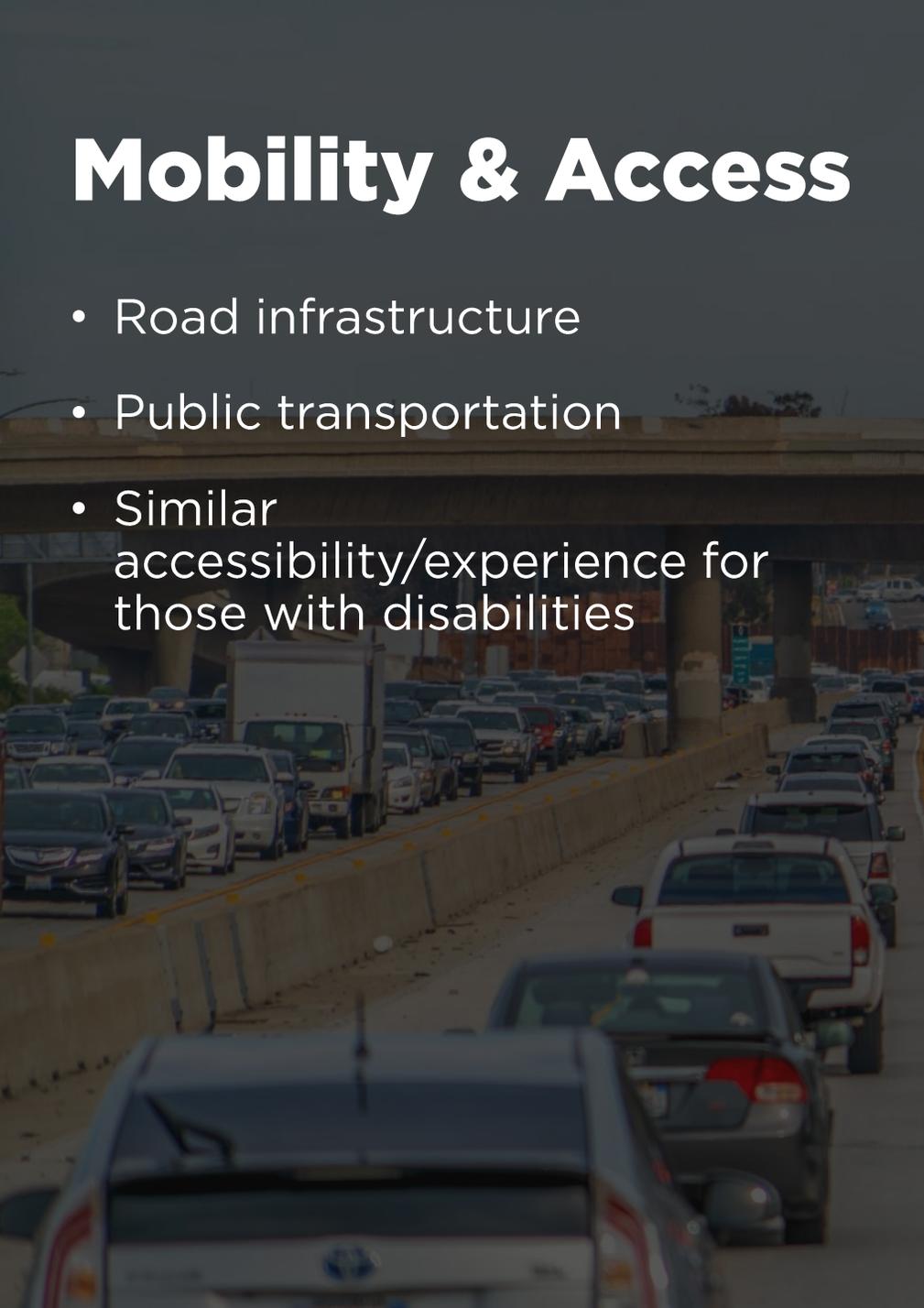
4th

Destination Strength Performance



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

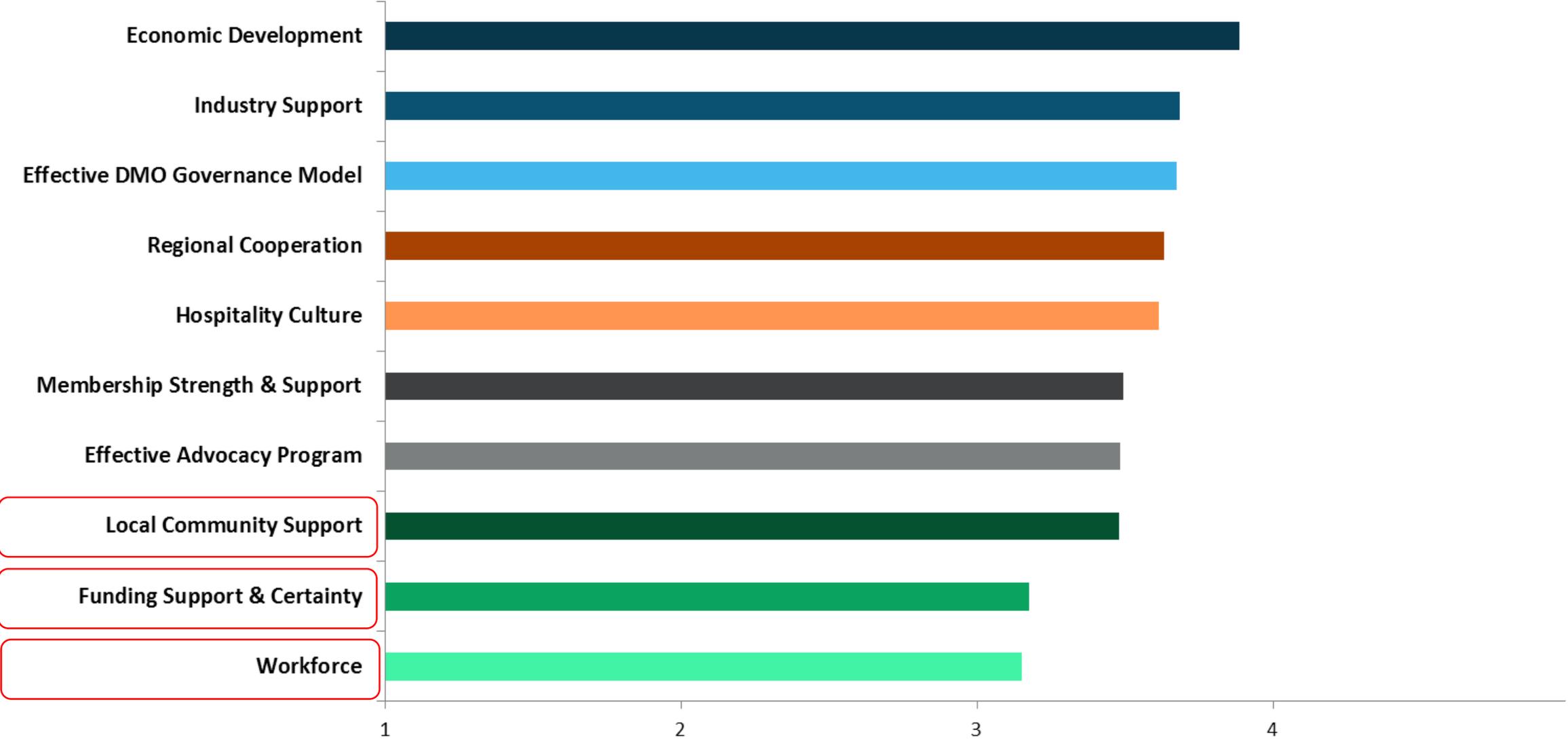
3rd



Local Community Support

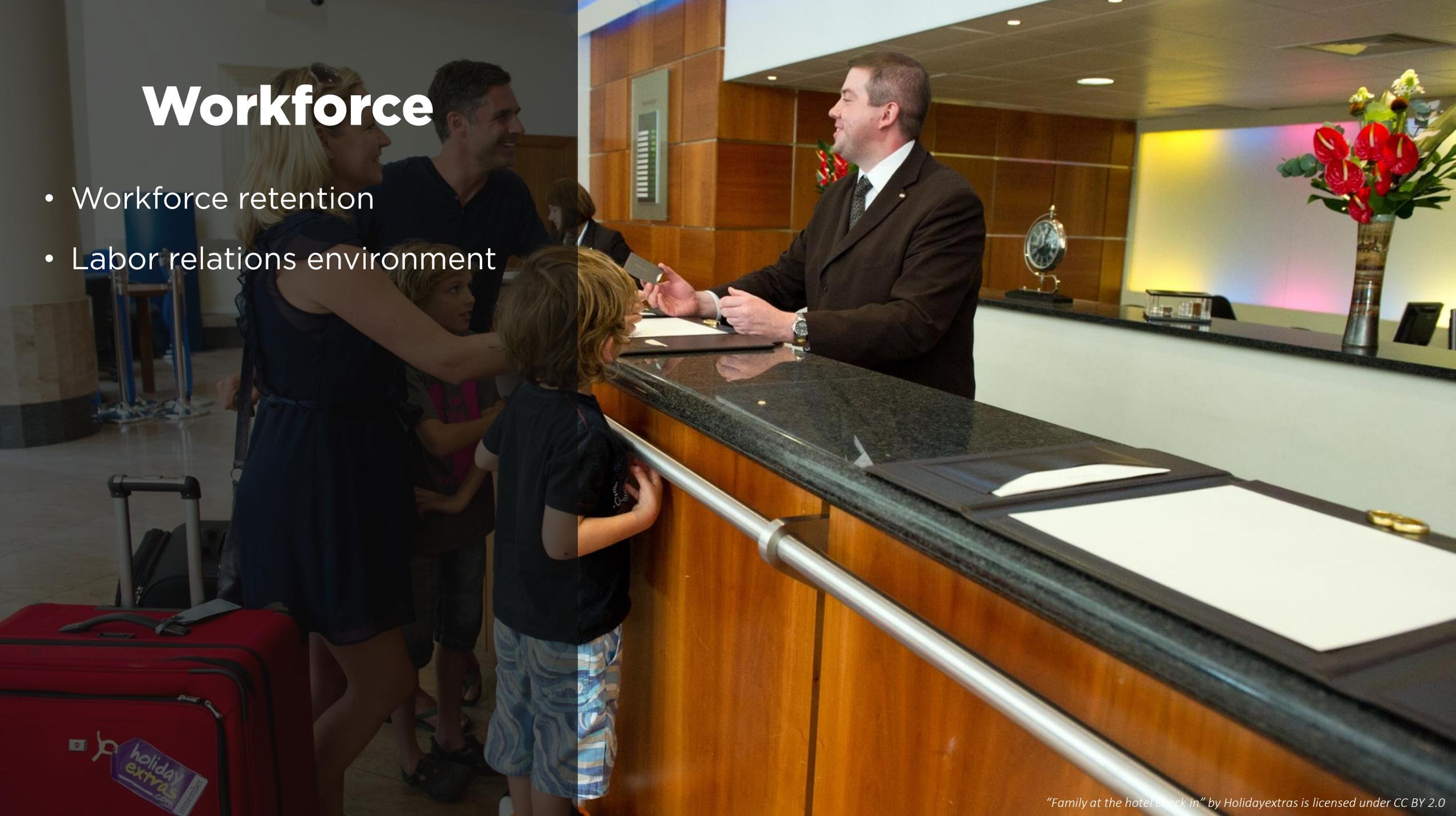
4th

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



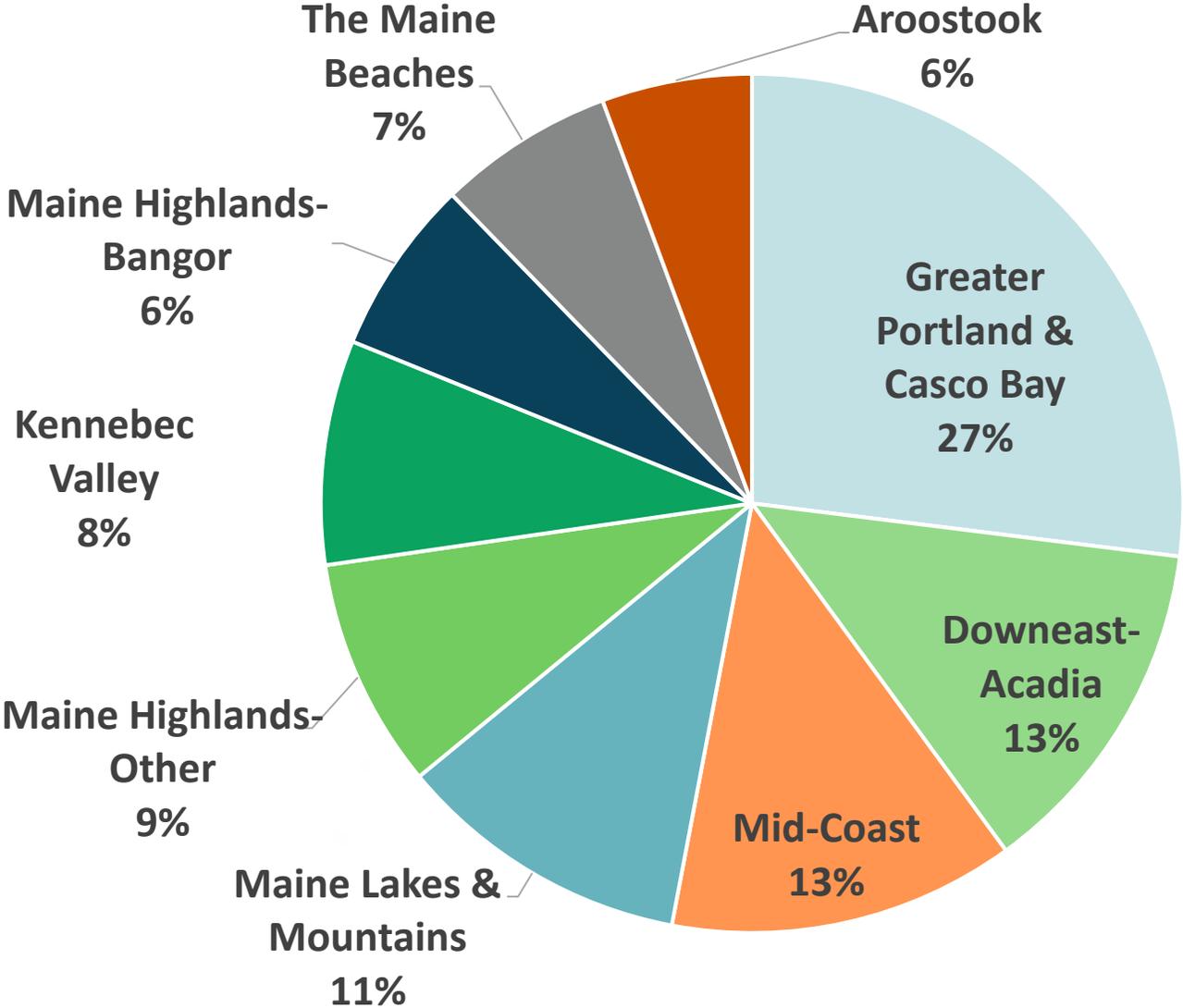
DESTINATION NEXT

Multi-User Online Diagnostic
Tool Results:
State of Maine Assessment

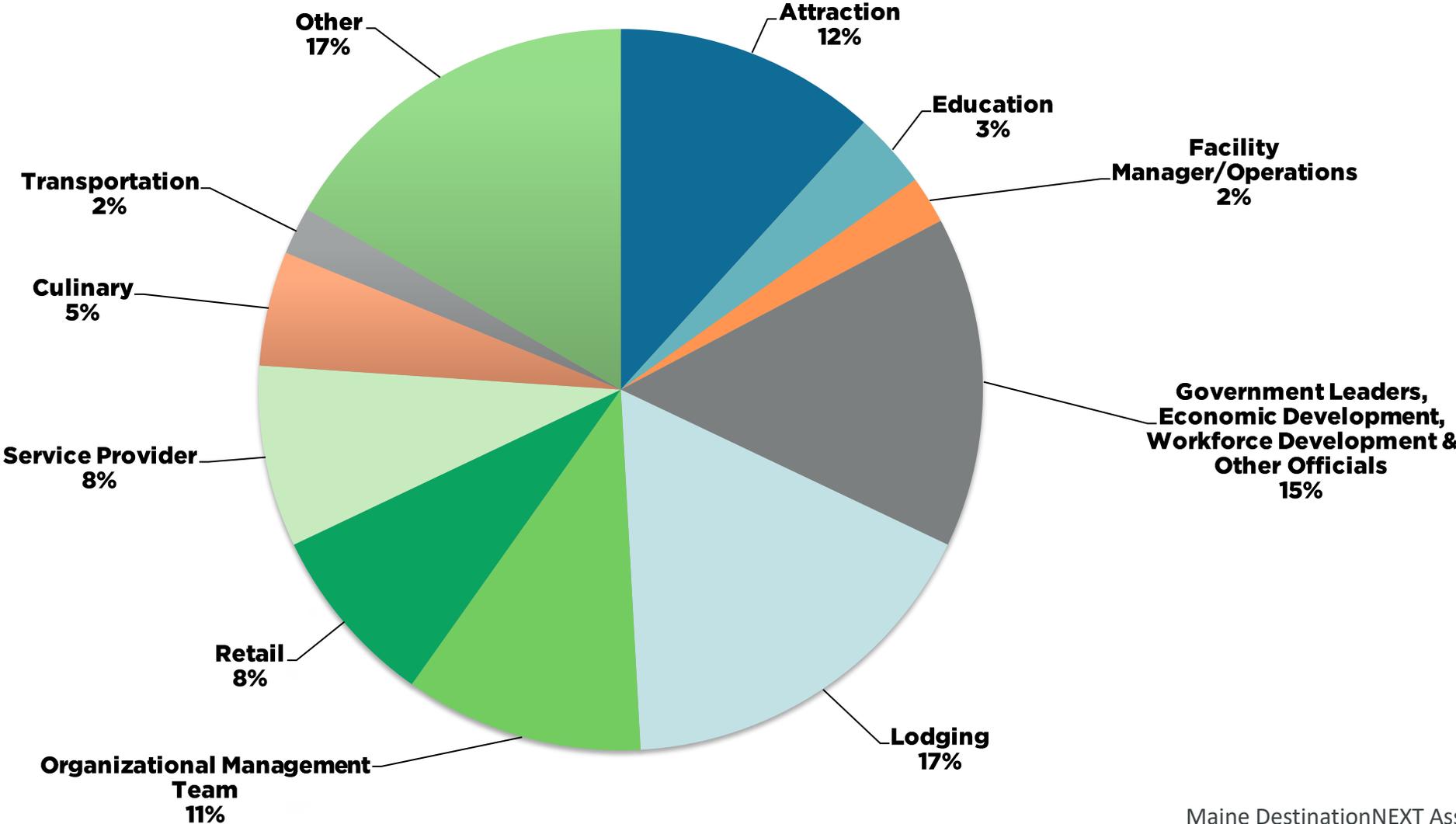
March 29, 2018



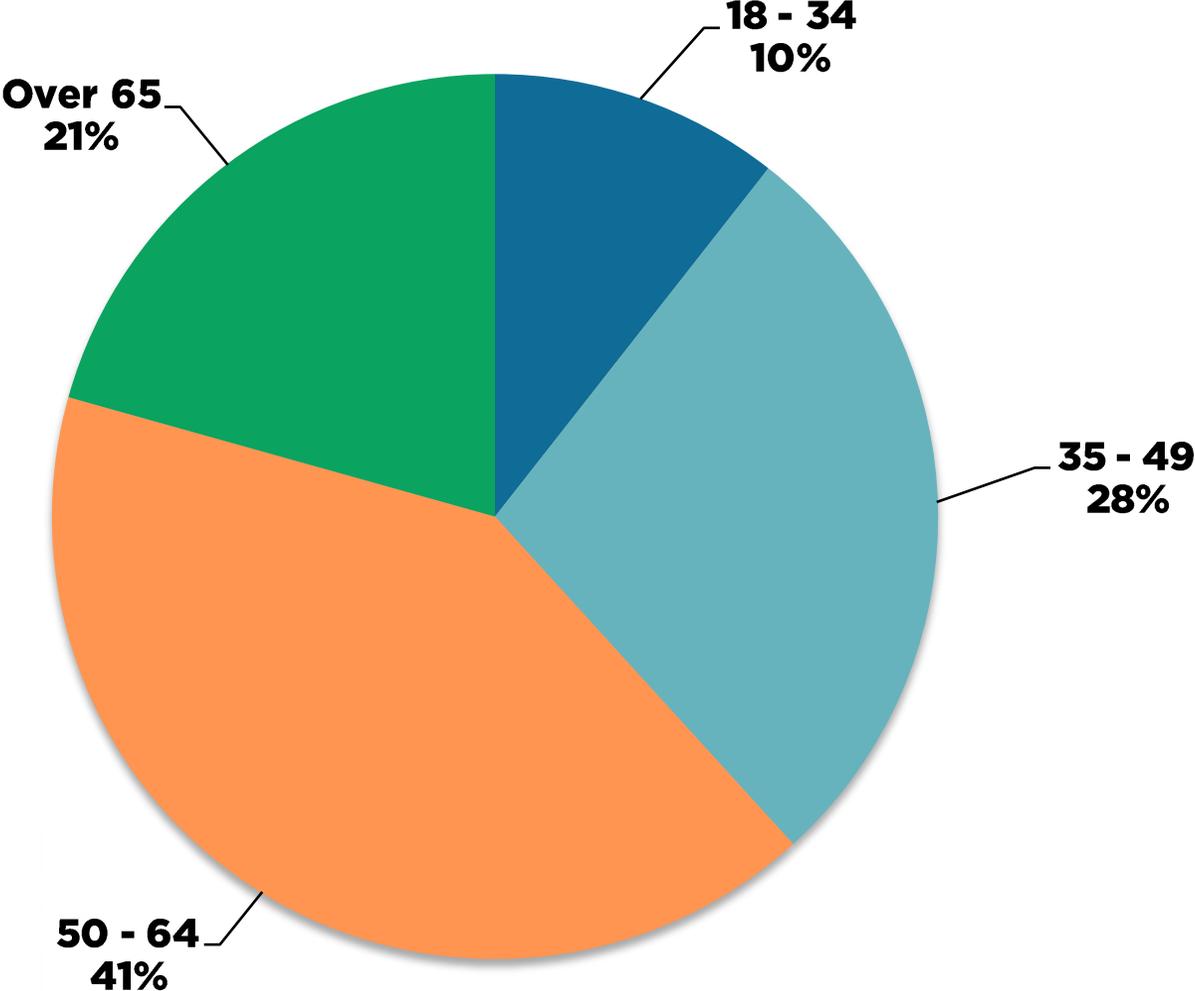
1,033 Responses - by Region



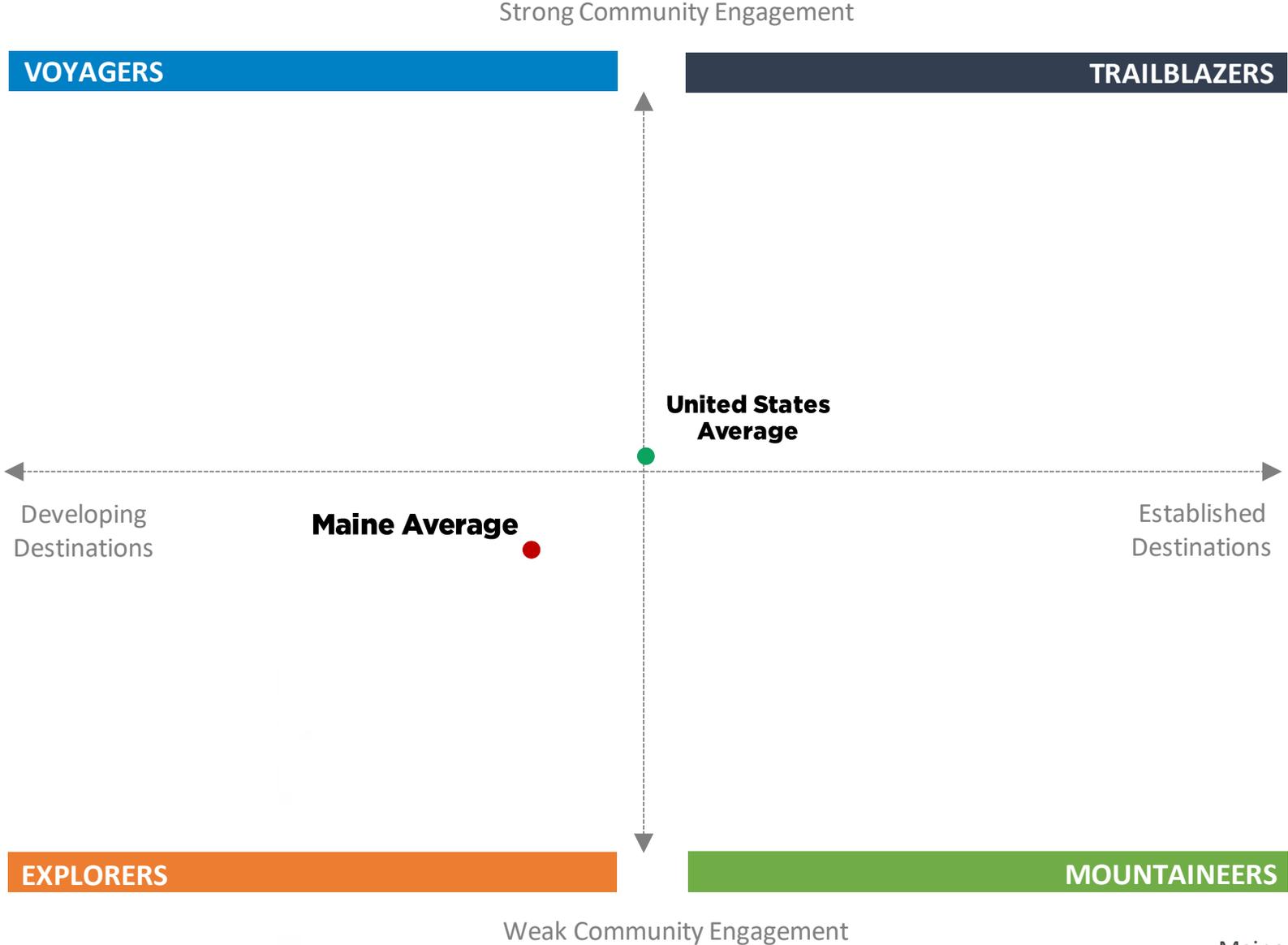
1,033 Responses – By Stakeholder



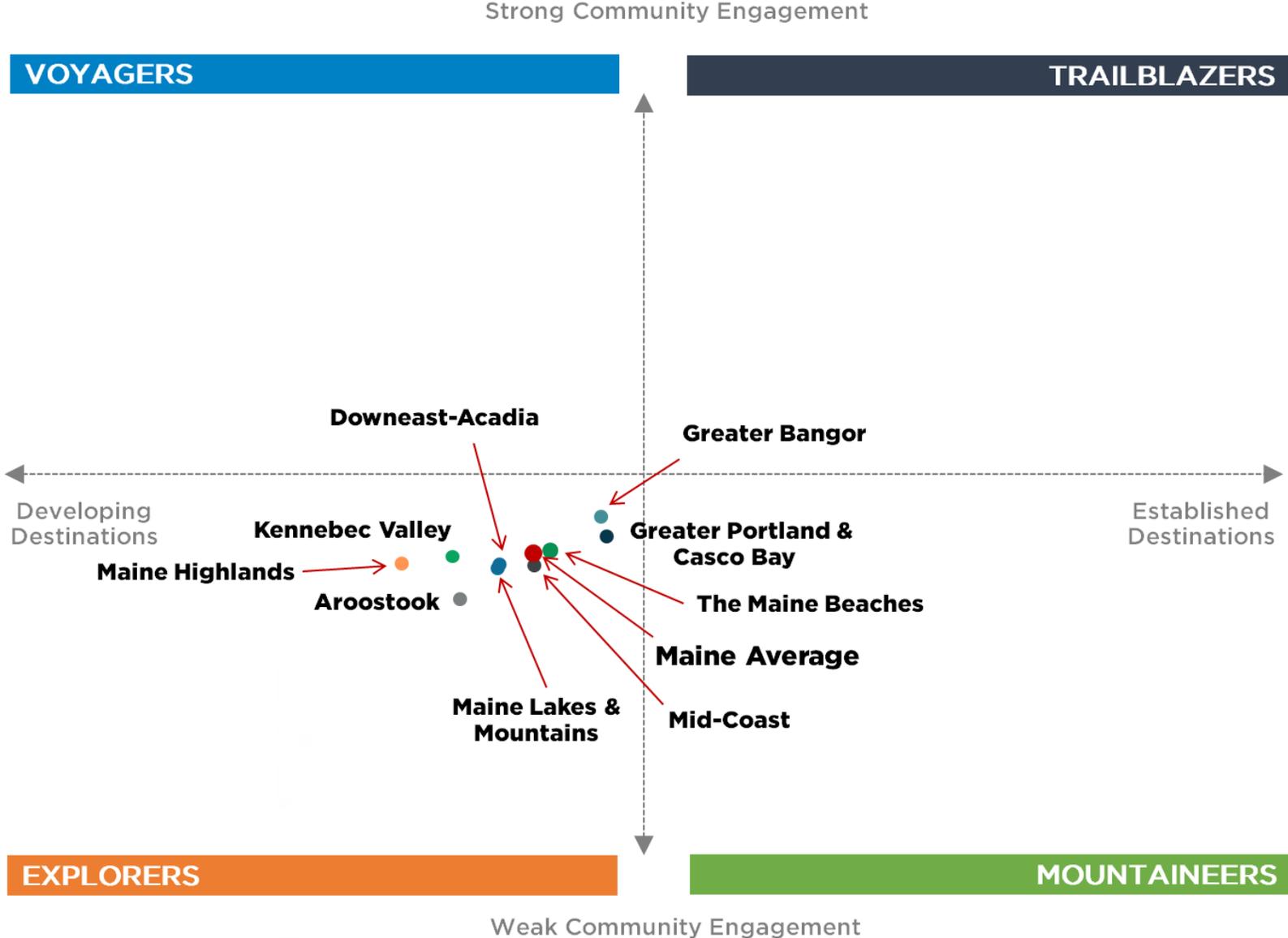
Age Demographic



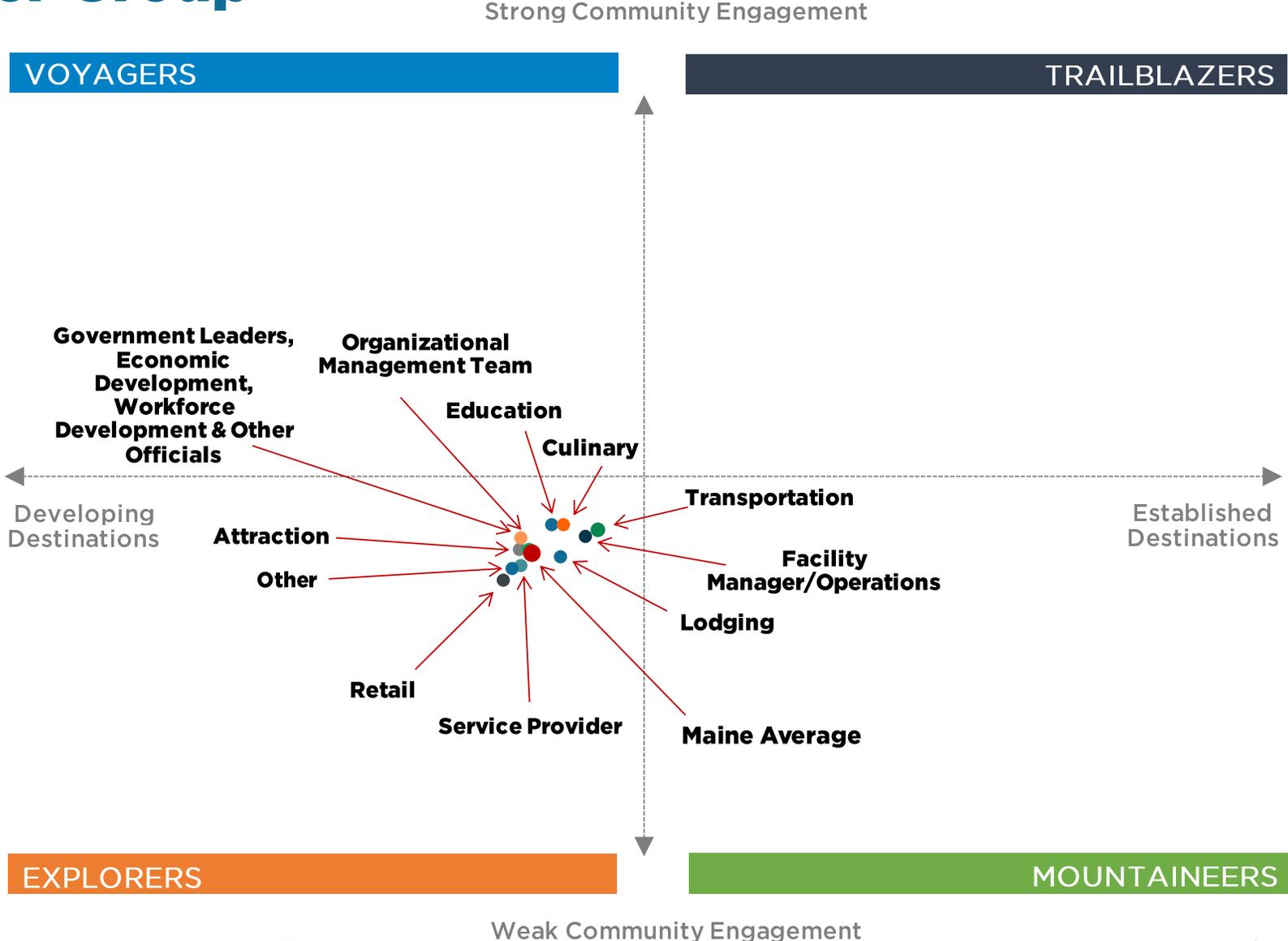
State of Maine Overall Assessment - Industry



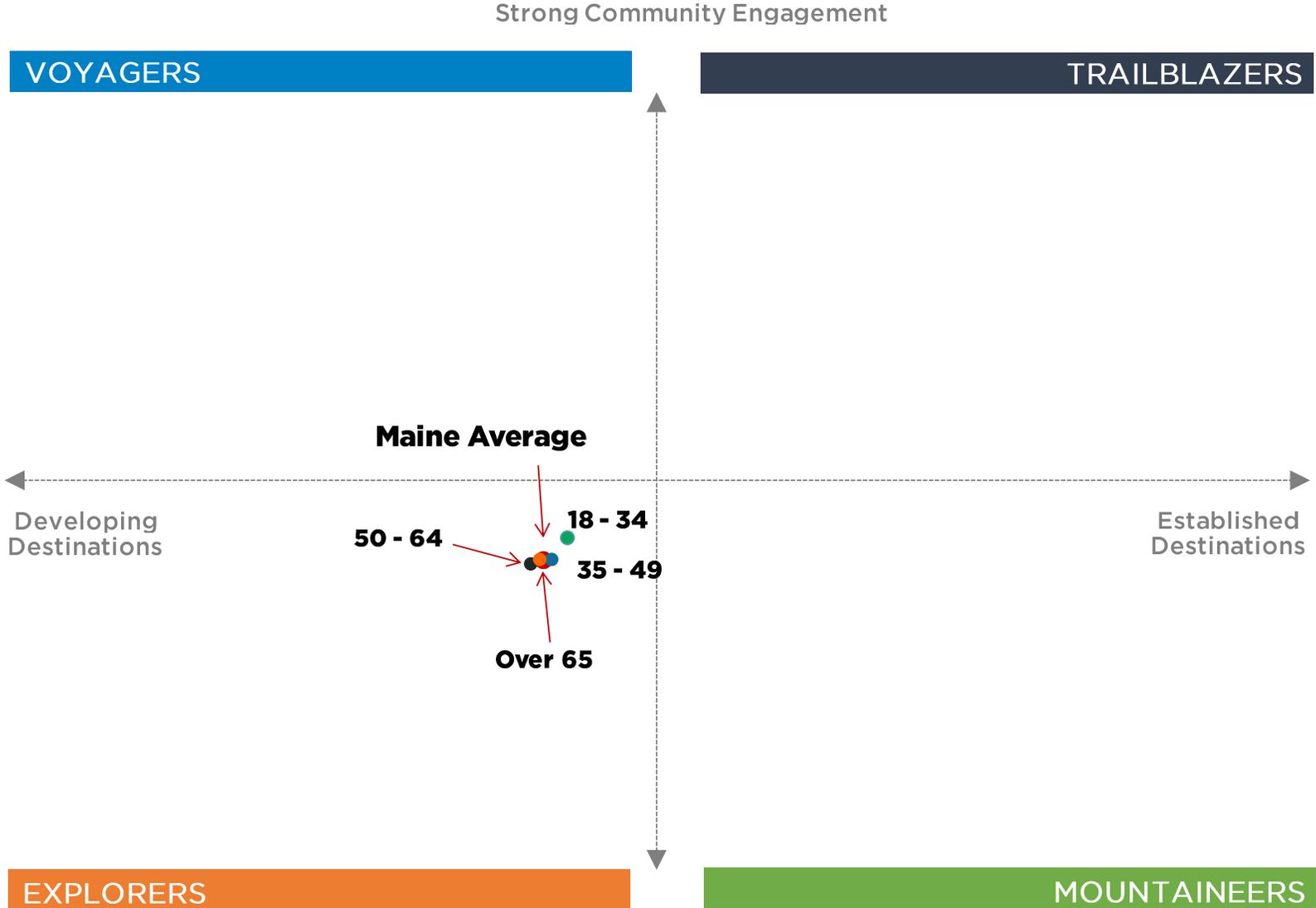
State of Maine Overall Assessment – Regions



State of Maine Overall Assessment – Stakeholder Group



State of Maine Overall Assessment – Age



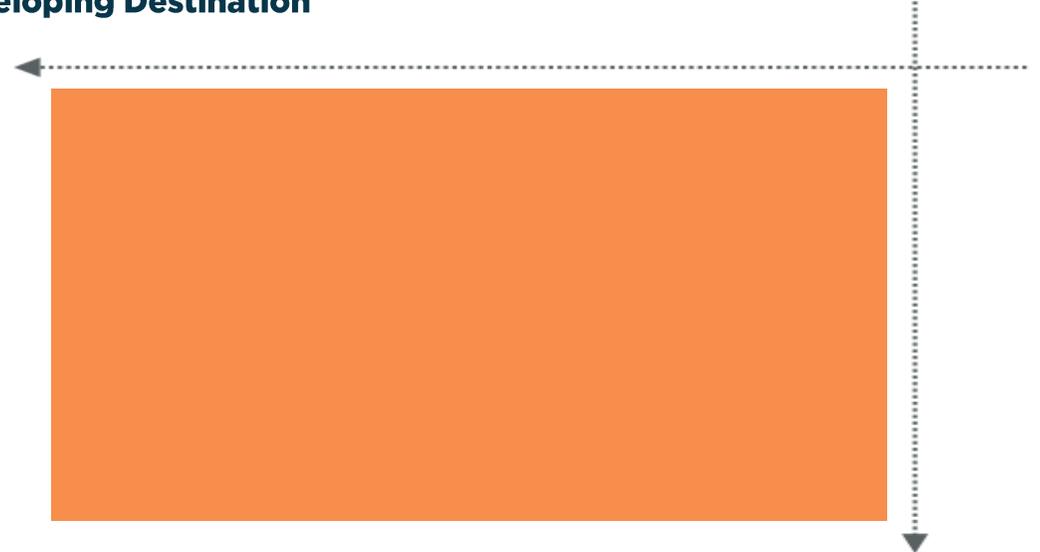
Explorers

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

Key Strategic Challenges

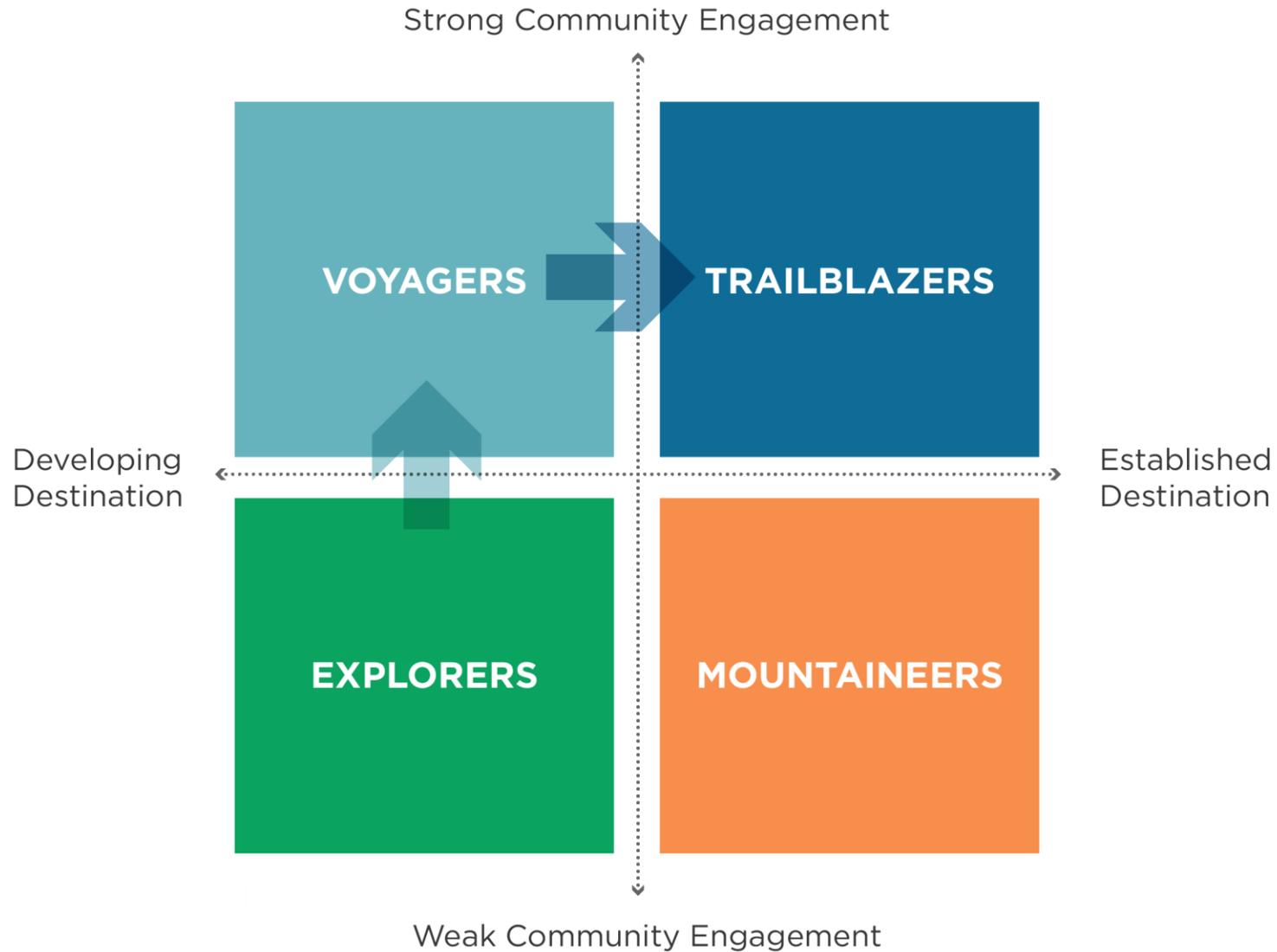
- **Rallying the community to work together towards a realistic vision and strategy**
- **Building community recognition and acceptance that transformational change is needed**
- **Implementing the strategy with limited resources**

Developing Destination

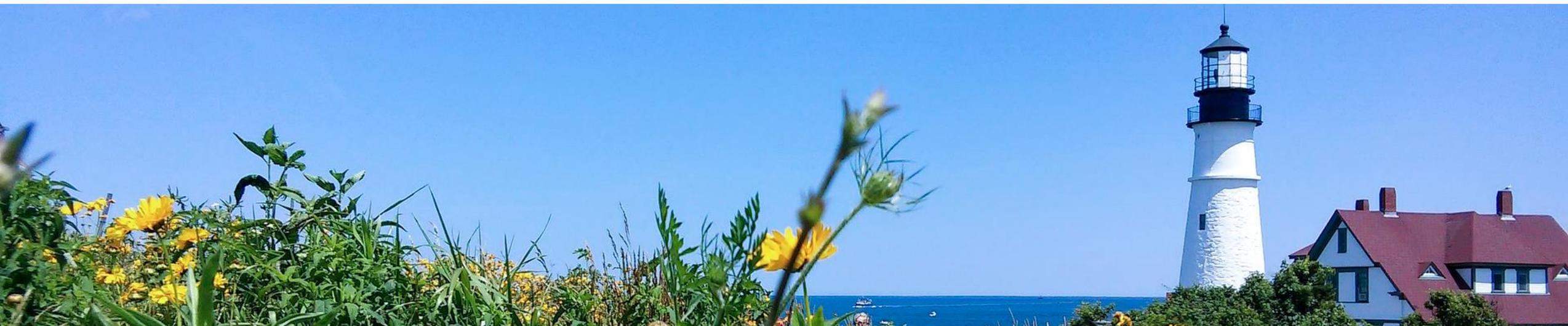


Weak Community Engagement

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 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.

Destination Strength - Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
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.
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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 SCENARIO **EXPLORERS**

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Community Support & Engagement - Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
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

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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	✓	✓					✓		

DESTINATION NEXT

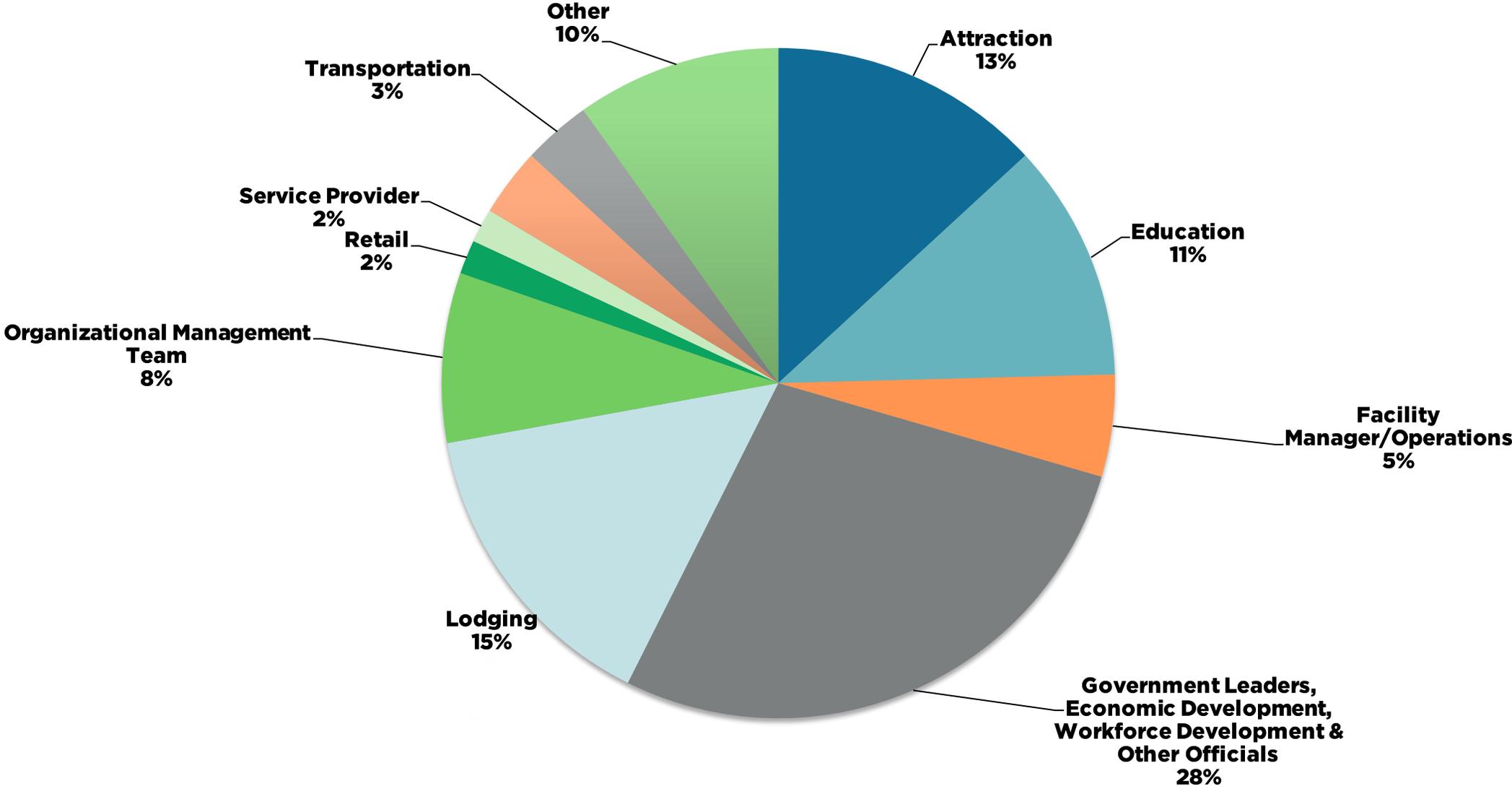
Multi-User Online Diagnostic
Tool Results:

State of Maine Assessment -
Greater Bangor

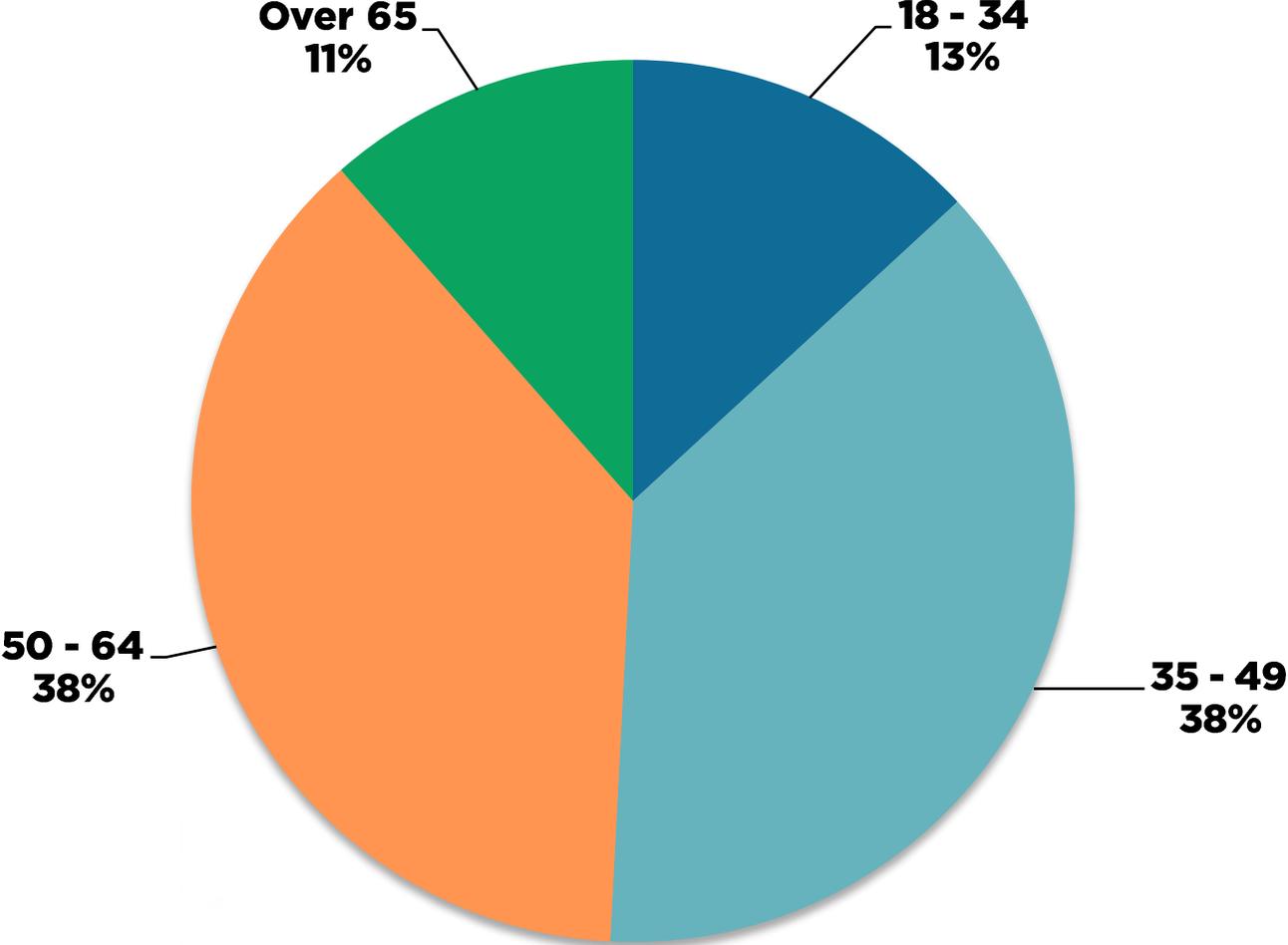
June 4, 2018



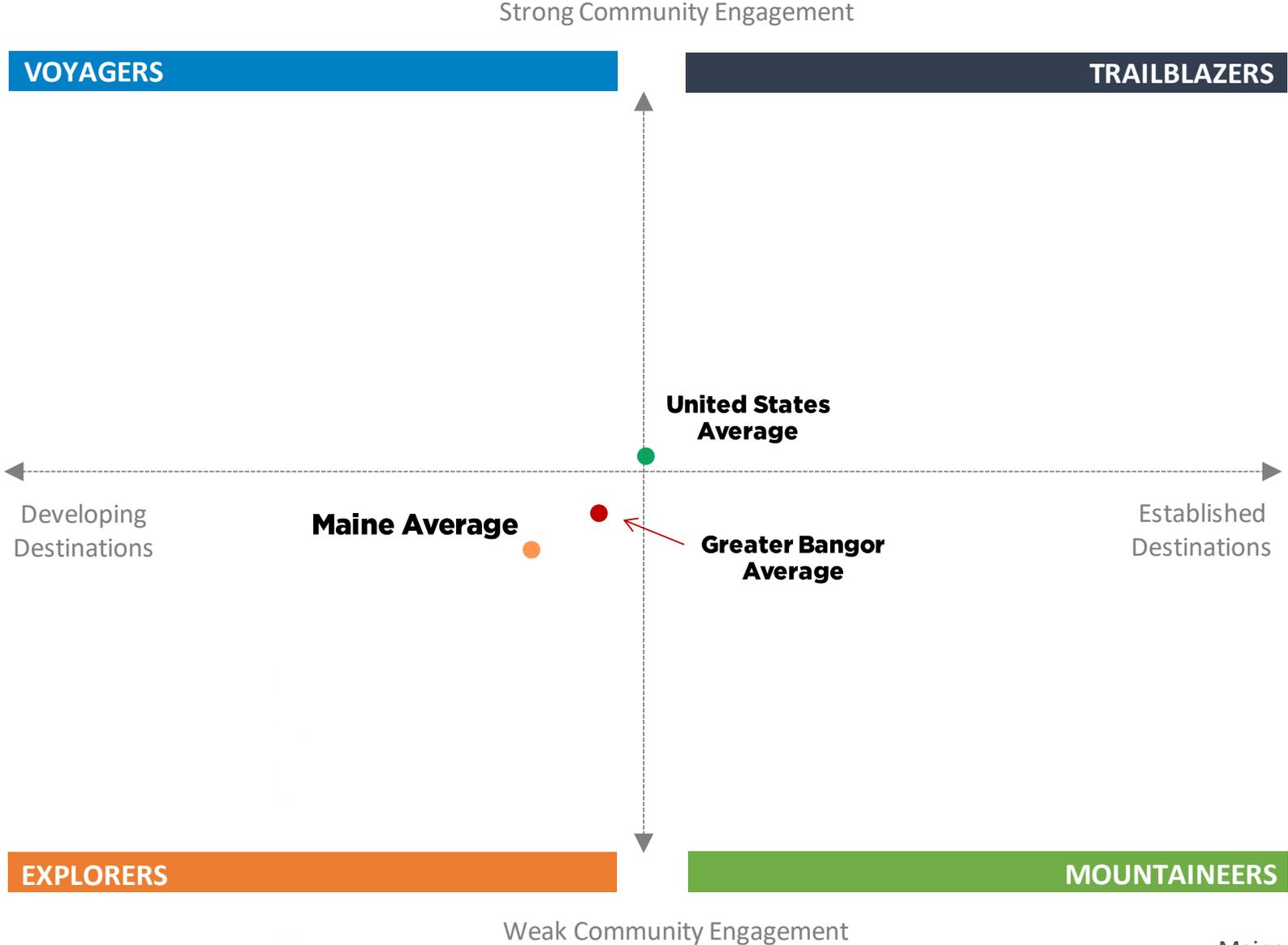
61 Responses



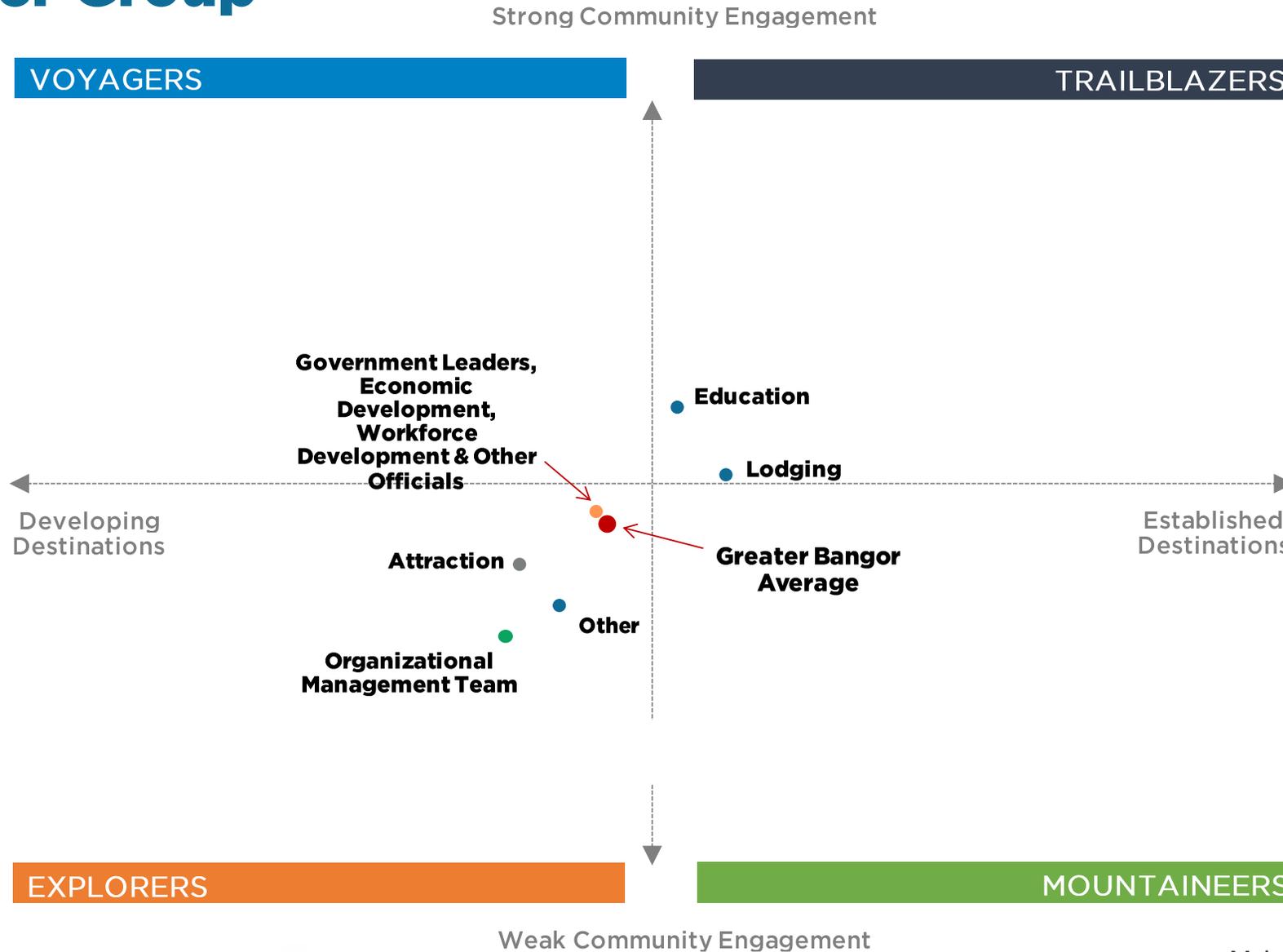
Age Demographic



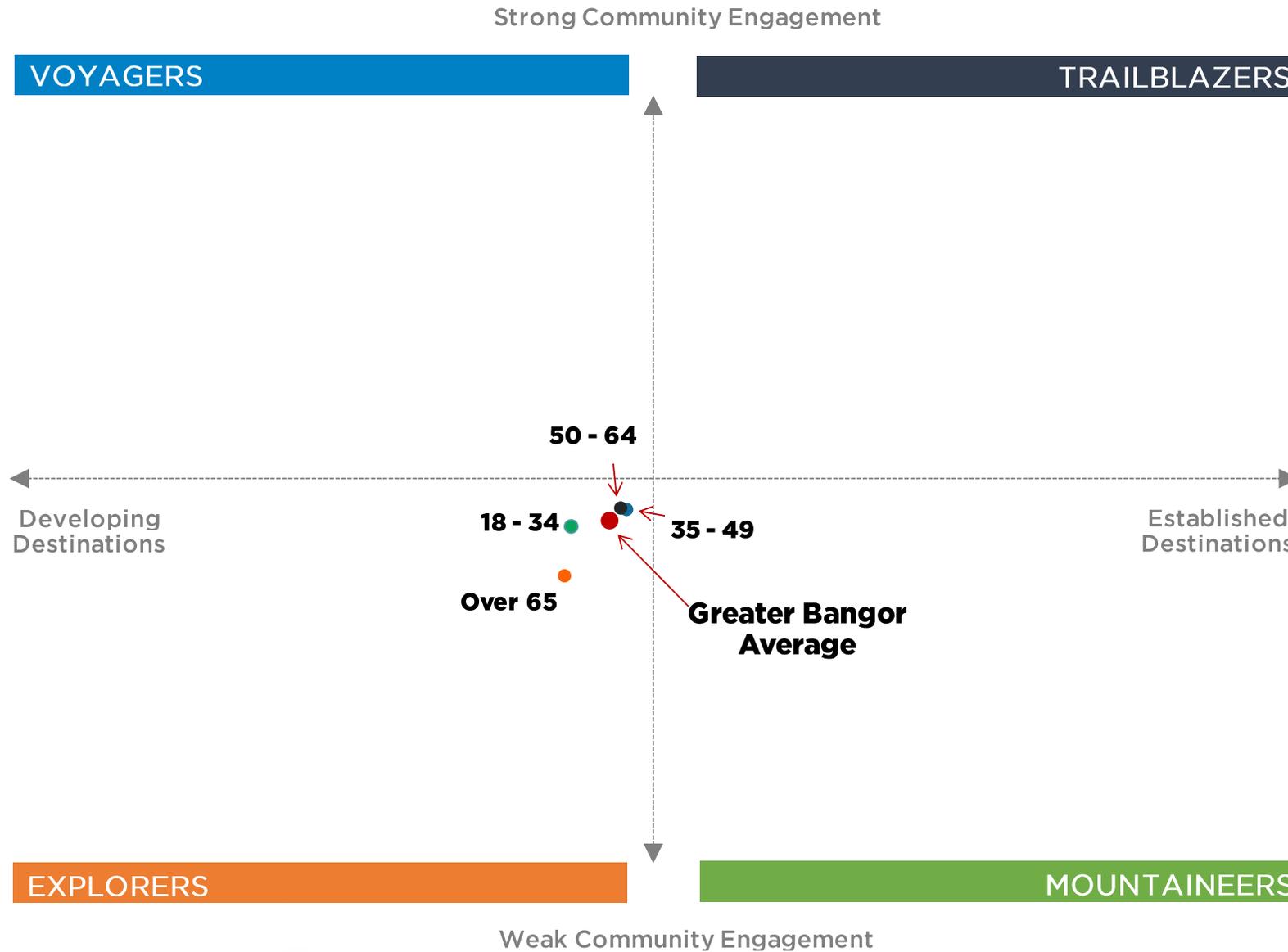
Greater Bangor Overall Assessment - Industry



Greater Bangor Overall Assessment - Stakeholder Group

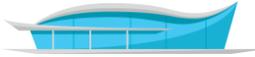


Greater Bangor Overall Assessment - Age



Destination Strength Rankings – Greater Bangor



	Relative Importance	Perceived Performance
 Convention & Meeting Facilities	1 st	8 th
 Accommodation	2 nd	5 th
 Mobility & Access	3 rd	10 th
 Sports & Recreation Facilities	4 th	2 nd

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Greater Bangor Average	Standard Deviation	Industry Average	Greater Bangor Average	Standard Deviation
Convention & Meeting Facilities	9.7%	10.9%	1%	3.11	3.12	0.70
Accommodation	10.5%	10.7%	1%	3.54	3.39	0.60
Mobility & Access	10.1%	10.5%	1%	3.12	2.89	0.78
Sports & Recreation Facilities	9.4%	10.5%	1%	3.29	3.47	0.54
Destination Performance	10.0%	10.0%	1%	3.88	3.40	0.57
Attractions & Entertainment	10.8%	10.0%	1%	3.65	3.20	0.72
Brand	10.5%	9.8%	1%	3.49	3.41	0.62
Events	9.7%	9.7%	1%	3.63	3.84	0.65
Air Access	9.2%	9.3%	1%	3.16	3.21	0.52
Communication & Internet Infrastructure	10.1%	8.7%	1%	3.39	2.97	0.81

DESTINATION STRENGTH - Greater Bangor	3.30
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.
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Destination Strength - Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
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

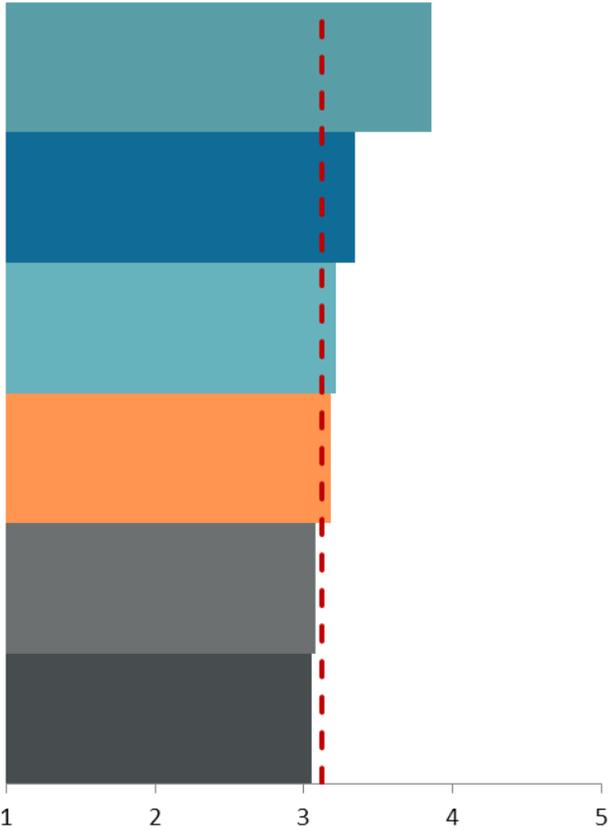
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Red shading signifies that the region underperformed the destination average by greater than 0.4.

Convention & Meeting Facilities

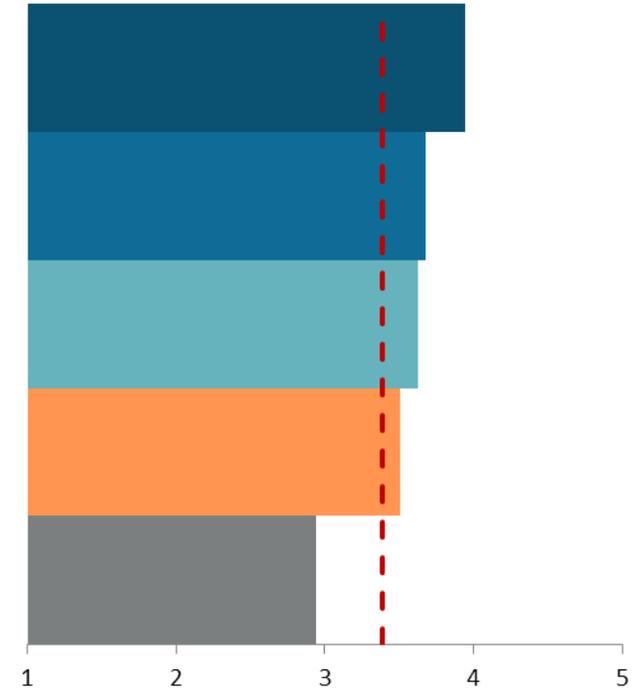
- Has the necessary convention, meeting, and trade show facilities to compete today
- Convention center meeting and networking space is well branded
- Has good, unique off-site venues for special events
- Has the necessary convention, meeting, and trade show facilities to compete for the next 25 years
- Offers an abundance of professional and experienced convention and/or meeting services suppliers
- Where possible, hotels/other meeting venues take full advantage of the views



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

Accommodation

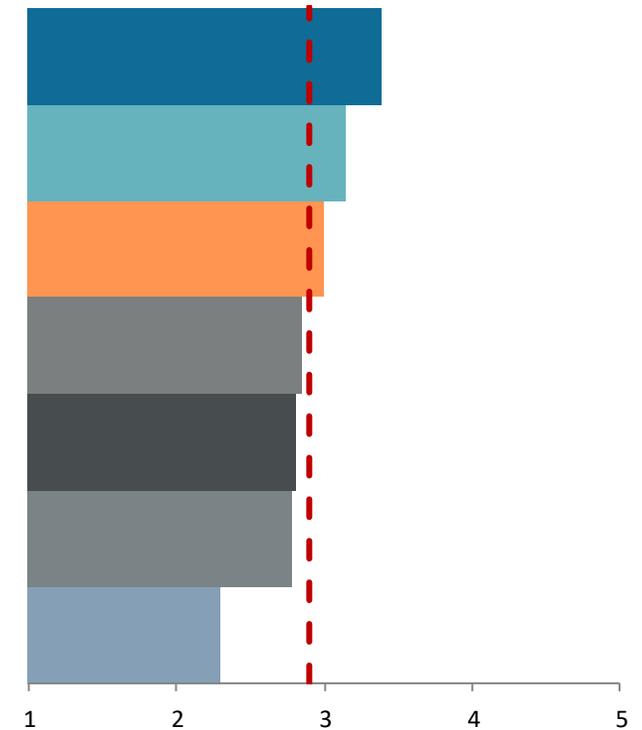
- Has a healthy presence of well-known brand name hotels
- Has adequate hotel accommodations capacity
- Offers a diversity of accommodation price options
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)



Note
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Mobility & Access

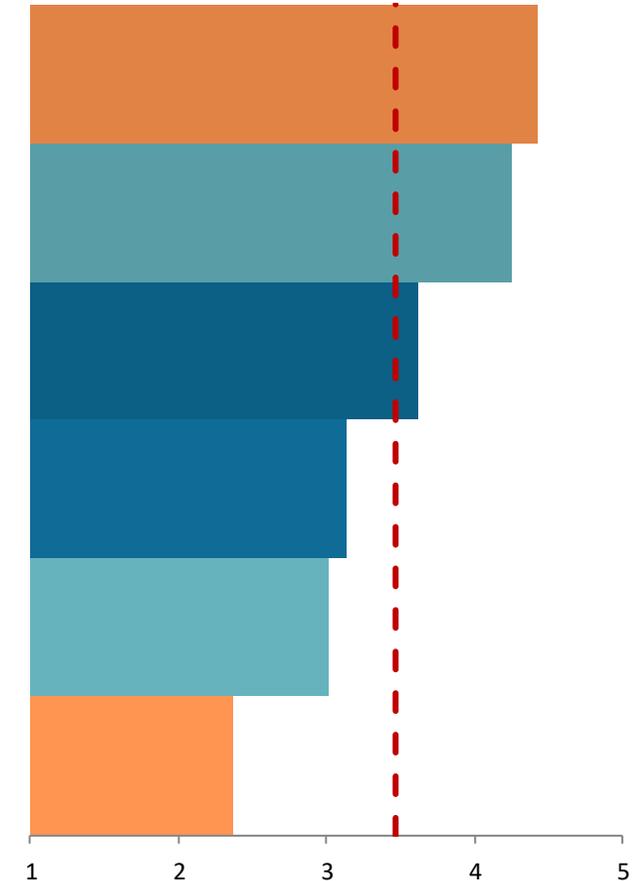
- Roads can easily handle residents, businesses and visitor traffic throughout the year
- Provides good access and mobility for those with disabilities
- Has great directional signage and highways that make it easy to get around
- Has adequate bike paths/pedestrian walkways that makes it easy for visitors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

Sports & Recreation Facilities

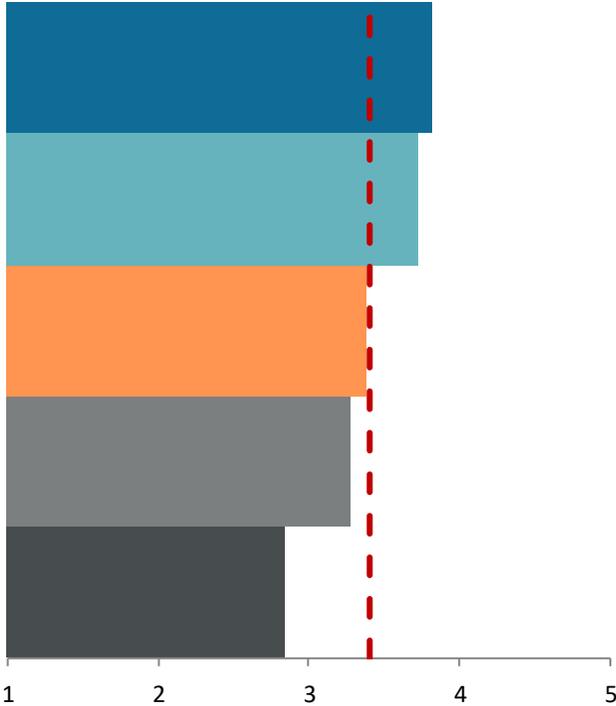
- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- Has the sports fields and availability to host major amateur and/or collegiate sporting events
- The Maine Sports Commission 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 venues to host major professional sporting events



Note
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Destination Performance

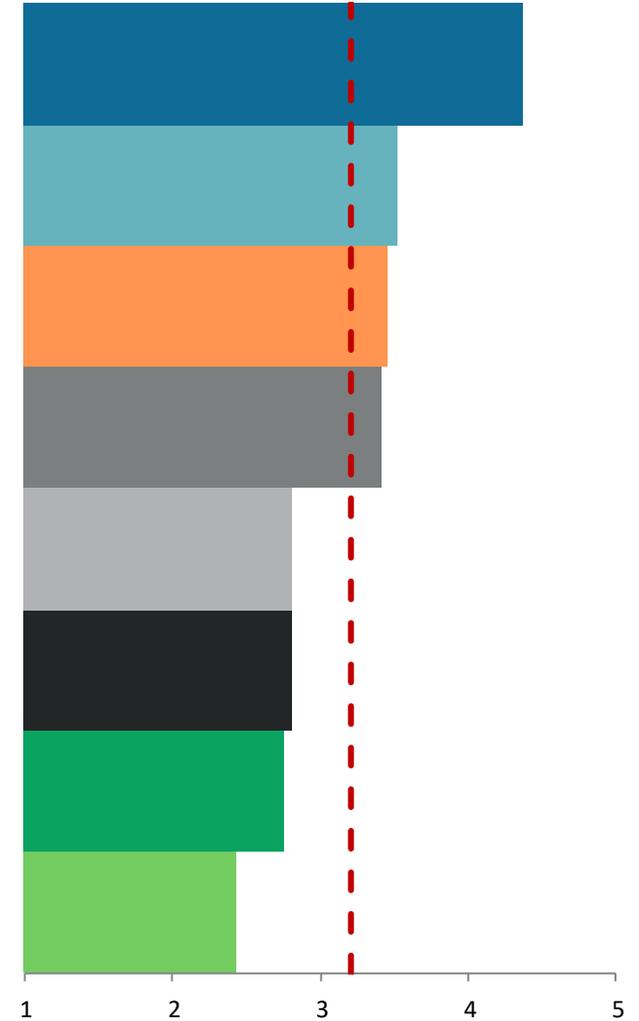
- Is experiencing a positive growth in overnight visitation
- Hotels are performing well (e.g. Occupancy, RevPAR)
- Tourism industry performance is adequately measured and tracked
- Is successfully attracting meetings and conventions
- The tourism industry does a good job at communicating the performance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



Note
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Attractions & Entertainment

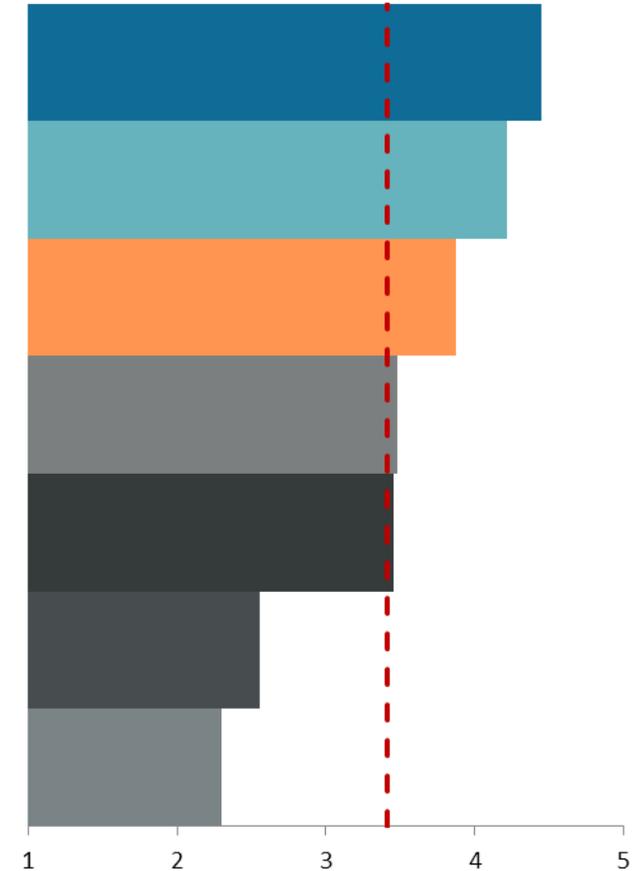
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has unique and high-quality dining options
- Has high-quality and wide-ranging arts and cultural attractions
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)
- Towns and cities offer diverse and high-quality shopping opportunities
- Has unique and vibrant neighborhoods that are attractive and accommodating to visitors
- Has the type of large, famous attractions that cause people to stay (or plan to stay) an extra day
- Suburban and/or rural areas offer diverse and high-quality shopping opportunities



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

Brand

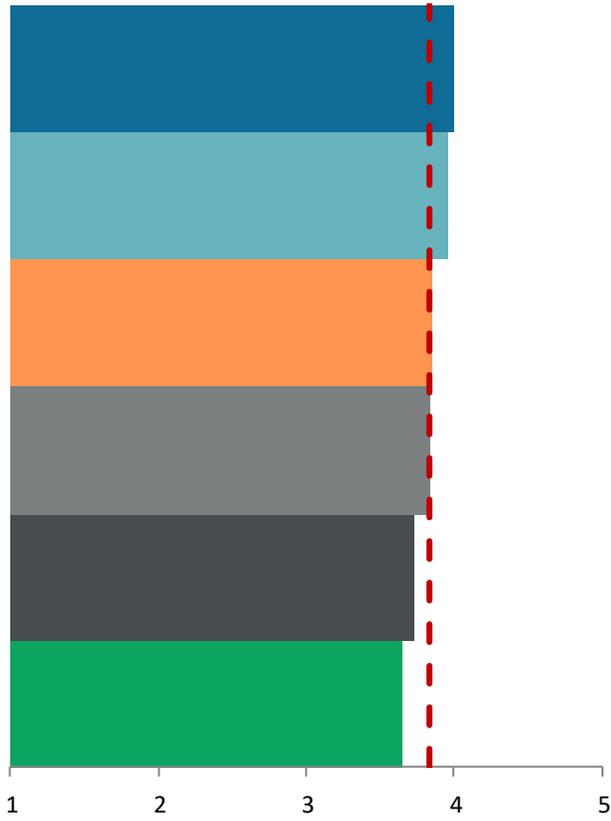
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for being environmentally conscious and sustainable
- Is known for having a lot of things to see and do
- Appeals to a diverse range of visitors
- Has an effective region-wide marketing message
- Is prepared for international tourism with adequate translations and guides



Note
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Events

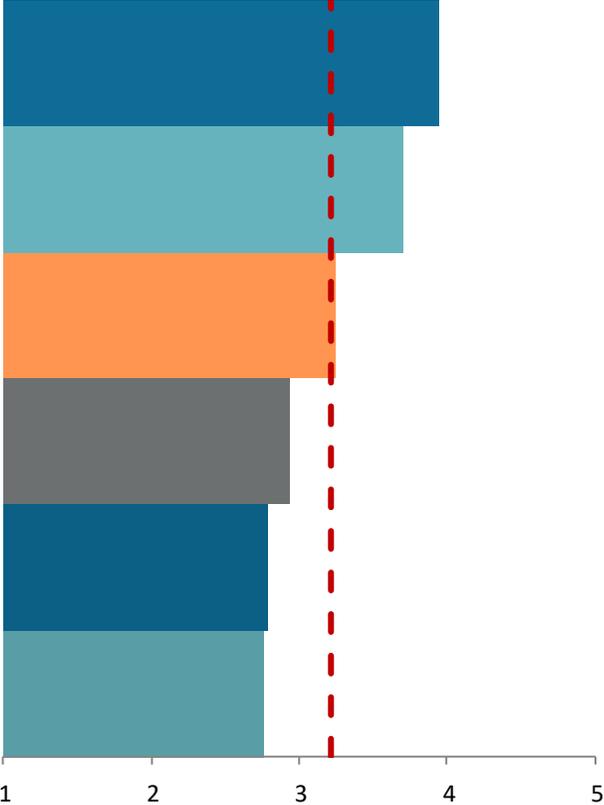
- Has an abundance of parks and outdoor spaces for handling special events
- Local venues produce numerous public/lifestyle shows throughout the year for residents to enjoy
- Offers major events that attract non-local visitors
- The citizens of the region are supportive of hosting major sporting/national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



Note
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Air Access

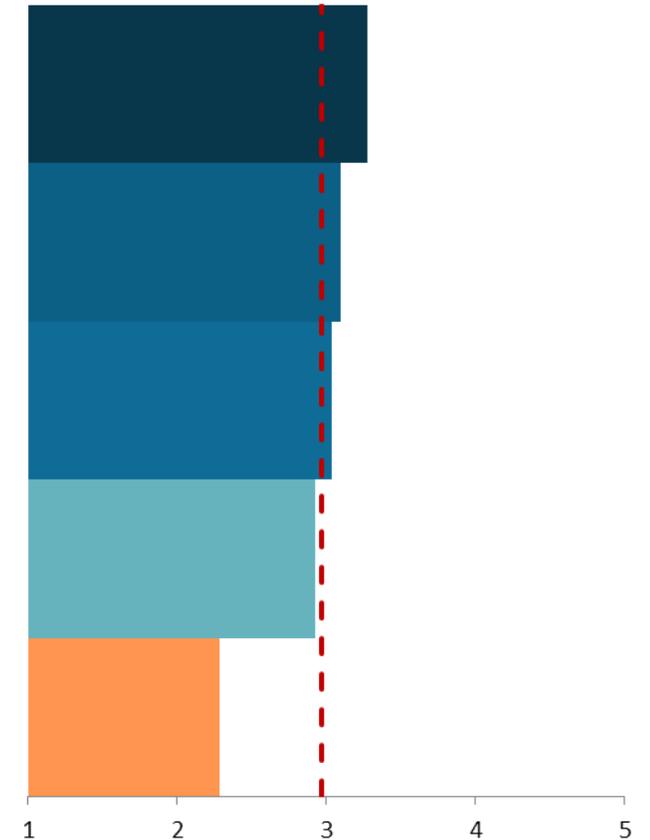
- Local airport has the facilities to grow tourism in the region
- Local airport offers a "sense of place" that supports the brand and promotes the region and state
- Has adequate domestic air access through airports (number of flights/capacity)
- Has adequate domestic air access through airports (#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



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

Communication & Internet Infrastructure

- There is substantial Wi-Fi access in region’s meeting/convention facilities
- Tourism industry uses and leverages social media to support the brand and market
- 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
- Offers sufficient free Wi-Fi in outdoor/public areas with high visitor traffic



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

Community Support & Engagement – Greater Bangor



		Relative Importance	Perceived Performance
	Local Community Support	1 st	2 nd
	Industry Support	2 nd	5 th
	Workforce	3 rd	9 th
	Membership Strength & Support	4 th	6 th

Community Support & Engagement - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Greater Bangor Average	Standard Deviation	Industry Average	Greater Bangor Average	Standard Deviation
Local Community Support	10.2%	10.4%	1%	3.56	3.65	0.72
Industry Support	9.9%	10.4%	1%	3.81	3.58	0.92
Workforce	10.1%	10.2%	1%	3.31	2.75	0.70
Membership Strength & Support	9.6%	10.1%	1%	3.76	3.52	0.89
Economic Development	10.2%	10.1%	1%	3.95	4.11	0.48
Hospitality Culture	10.2%	10.1%	1%	3.71	3.62	0.91
Regional Cooperation	10.0%	10.0%	1%	3.76	3.45	0.98
Effective Advocacy Program	10.2%	9.8%	1%	3.63	3.43	0.77
Effective DMO Governance Model	9.6%	9.5%	1%	3.80	3.62	0.78
Funding Support & Certainty	9.9%	9.3%	1%	3.36	2.58	1.01

COMMUNITY SUPPORT & ENGAGEMENT - Greater Bangor	3.44
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

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.

Community Support & Engagement - Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
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

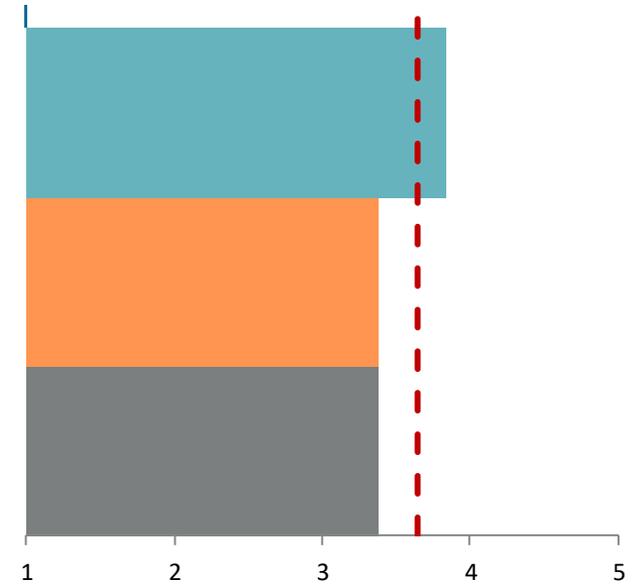
EXPLORERS

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.

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

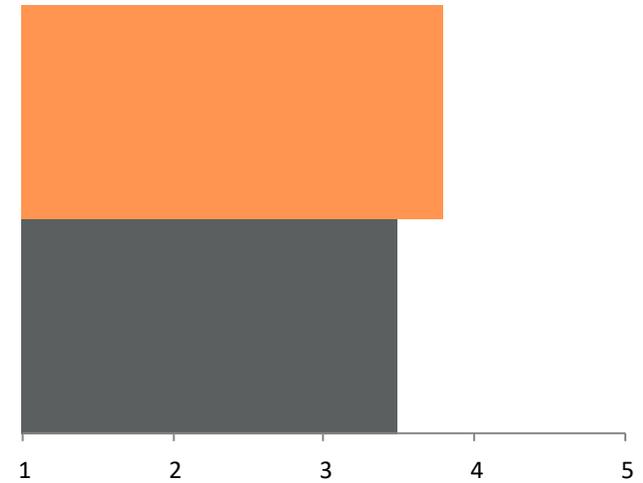


Note
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Industry Support

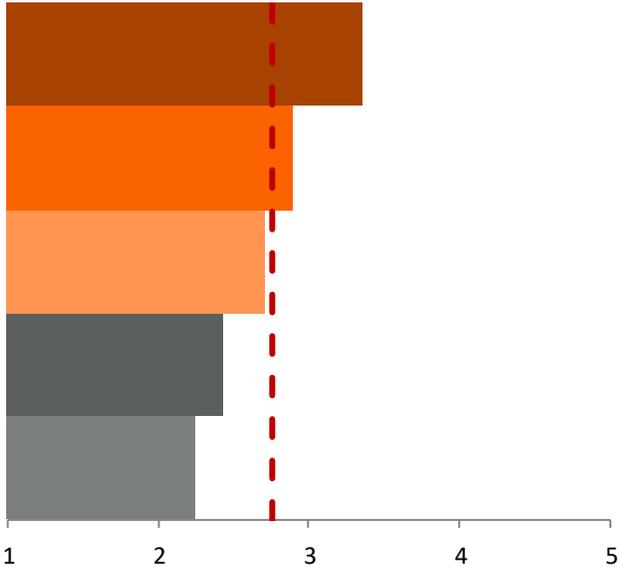
- Tourism industry leaders and stakeholders are supportive of the regional tourism industry

- Tourism industry leaders and stakeholders are investing in activities



Workforce

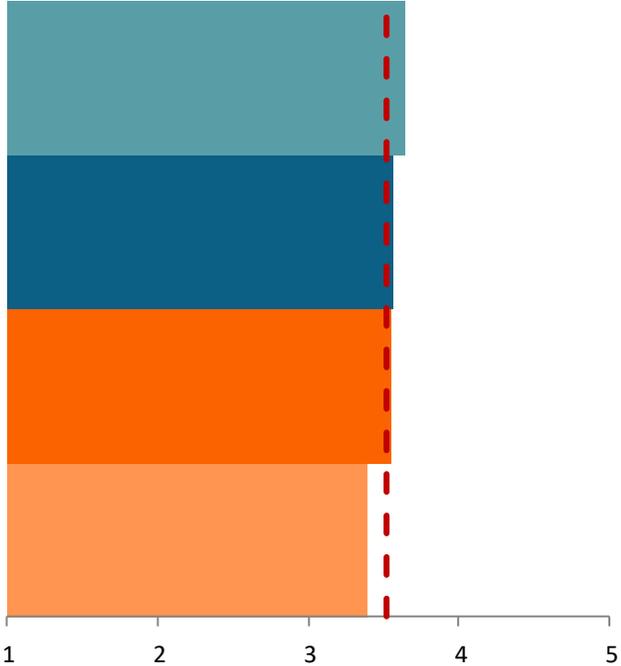
- The region has a strong base of hospitality education programs
- The region’s workforce is stable and has a positive labor relations environment
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The increase in rents and home prices has not affected the industry in terms of attracting employees
- 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.

Stakeholder Strength & Support

- Stakeholders find value in region-wide partnerships
- Stakeholders are active, engaged and supportive of tourism marketing
- Stakeholders are active, engaged and supportive of tourism development
- Stakeholders find value in partnerships that include other tourism regions



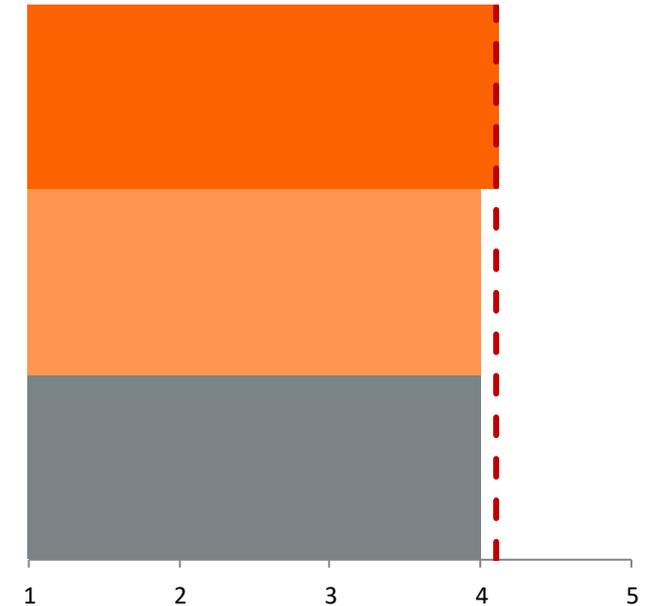
Note
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Economic Development

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

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

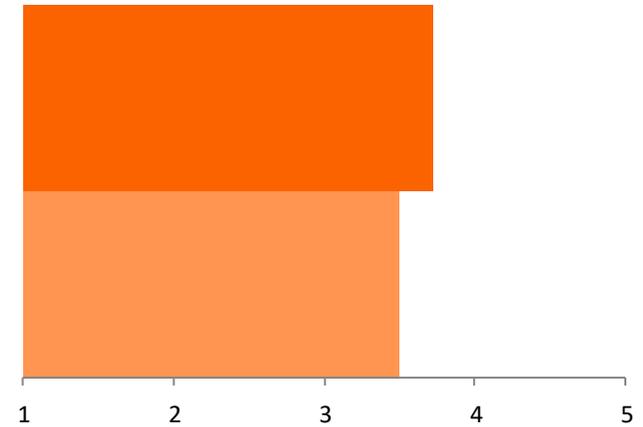
- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business development



Note
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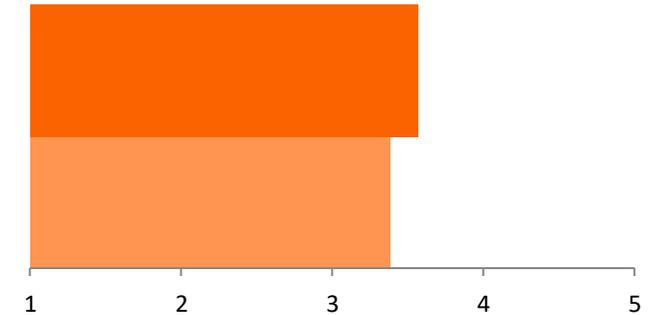
Hospitality Culture

- 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



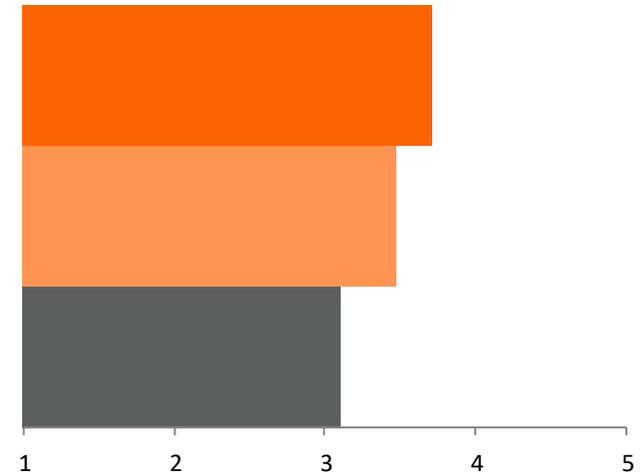
Regional Cooperation

- Tourism marketing efforts have broad economic benefits across the region
- There is broad collaboration and coordination among tourism partners in the region



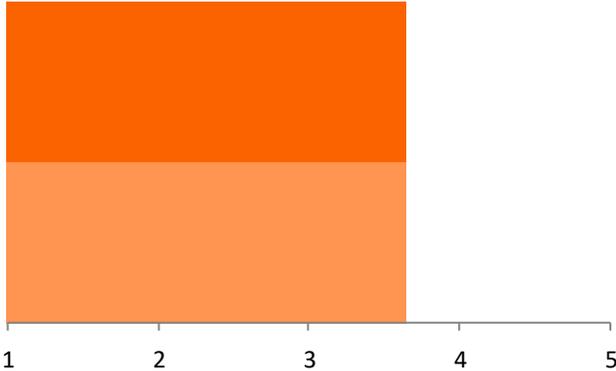
Effective Advocacy Program

- 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



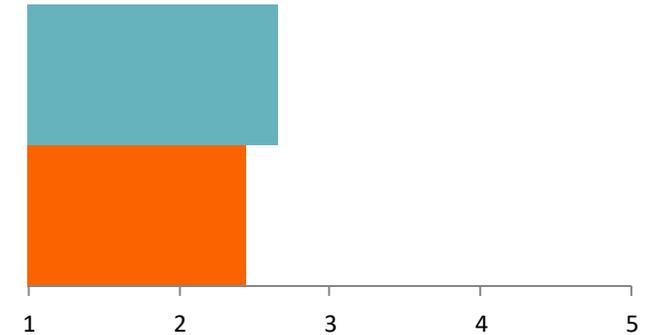
Effective Destination Organization Governance Model

- Organizations that impact tourism have an effective organizational structure
- Local leaders are engaged in the governance structure of organizations



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



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

- **Public transportation**
- **Iconic attractions**
- **High-quality shopping**
- **Headquarter hotels**
- **Shared economy accommodations**
- **Neighborhoods**
- **Sporting venues**
- **Communicating economic impact of tourism to the public**
- **Air access**
- **Wi-Fi**



Community Support & Engagement Opportunities

- **Local community support**
- **Workforce**
- **Funding**
- **Advocacy**

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

Advertising, Marketing, PR & Branding (35%)

- **A More Definitive Brand**
- **Greater online tools helping to showcase value in our assets - specifically, thinking ahead of the various repeat questions that are received by tourists and crafting valuable and relatable (proactive) answers for those questions along with video support**
- **More centrally marketed web site of all the things to do and see in the region. Marketed with a focus on the average tourist or businessperson.**
- **Stronger branding and messaging about the unique resources and experiences that are available in the region**

Transportation Infrastructure (13%)

- **Air connection to Boston**
- **East West Highway, more open borders with Canada, better all around access into the state**
- **Easier public transportation, such as passenger train service**
- **Better road access, better transportation infrastructure**
- **“Connectivity”**

Visitor Amenities & Experiential Product Development (13%)

- **More interactive, engaging attractions and opportunities. Even kid, family friendly opportunities.**
- **More diverse retail establishments with a focus to product sources**
- **More destination packages which will appeal to all groups, i.e families, seniors, millennials**
- **Developing resources that help ensure that tourists/visitors can maximize their experience i.e navigators/concierges**

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

Branding, Advertising, Marketing (17%)

- **Attract more repeat visitors**
- **Promote educational landscape: UMaine, Husson - destination for young adults and young professionals**
- **Creating an environment that demonstrates Bangor as a "jumping off point"**
- **Stopovers for trips to the North Maine Woods**
- **Promotion as a hub to inland and coastal areas**
- **Promote as more than an outdoor destination: Casino/gaming, concerts, craft beer**

Attractions, Events & Entertainment (15%)

- **Better infrastructure for events**
- **Outdoor concerts and festivals**
- **Cultural (international) events/fairs and businesses**
- **Entertainment Options**
- **Stay, play, shopping all within walking distance of each other**
- **Venue-based entertainment**
- **Family oriented events - theme park**

Planning & Experiential Product Development (8%)

- **Experiences in the community - more opportunities to outdoor recreate, Stephen King tours, historical experiences**
- **encouraging business growth in non-saturated areas of the state, such as western and northern Maine**
- **Allow better use of the resources that are available here**
- **An effective State Plan to improve recognition of Maine**
- **Product development**

What are the top tourism issues to address?

Advertising, Marketing, & Promotion (25%)

- Stronger regional marketing
- Perception that Southern Maine (Portland and MidCoast Maine) is the only area that is worth visiting
- Need to sell what we are, not what we are trying to be
- Lack of knowledge of attractions, what do we have besides Freeport and Bar Harbour
- Lack of packaged deals
- Marketing (how to inform a greater clientele on what's happening)
- Awareness
- Bangor CVB website

Workforce Availability & Housing (14%)

- Employee shortage
- Workforce for part time jobs like servers, etc.
- Wages and employee retention
- Improve first hand knowledge of area destination activities/locales for service/hospitality front line staff
- Education of business owners that formal hospitality education is actually needed for high quality of service
- Affordable housing to attract workers

Transportation Infrastructure (13%)

- Walkability in the downtown area
- Transportation/roadways within the region
- Money for greater infrastructure improvements to roads, bridges, etc.
- Increased air traffic through BIA
- Ease of access from the south for both driving and flying
- Expansion of direct routes to and from Bangor
- Traveler infrastructure (roads, rest areas, etc.)

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

Culinary & Micro-Breweries/ Agritourism (26%)

- Brewery tours & events
- Ethnic focused events to include, foods, music, crafts
- Seafood and craft beers
- Regional brewery and culinary tours
- Food to table tourism
- Culinary experiences

Outdoor Recreation (18%)

- Customized outdoor adventures
- Outdoor Soft Adventure
- Outdoor experiences - hiking, environmental
- Entertainment/Recreation
- Camping recreation
- Hiking/water adventures

Nature, Wellness, Ecotourism (9%)

- Active, outdoor, health focused
- Off technology--people who want their kids to be unplugged and experience something real
- Eco tourism
- Gardens, public and private

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

Positive (41%)

- I hope that there will be a net gain in funding to tourism from marijuana tax revenues
- If put in a positive spin and marketed towards the Marijuana community that is not negative (as in bad community influence) then it can increase significantly with economic and community
- I think we will see a influx of visitors coming here for the marijuana experience
- Look at Colorado as an example - Marijuana tourism is positive and effective. Maine will miss the boat if it doesn't get moving on this
- Job growth. And tourism boom. Cash influx

Negative (34%)

- Without strong regulations regarding Marijuana use, like we have with cigarettes, I think that this will negatively impact the area much like the more open freedom to smoke tobacco products did with the exposure to second hand smoke
- This is still widely debated within regional groups and circles, which could negatively impact visitors and locals alike
- Negatively unless it is taxed at a much higher rate
- Negative impact as it is not regulated, already an issue with odor and appearance
- It will have a negative affect on many aspects of life in the region, from high energy use to decreased worker productivity and road safety, etc.

Neutral/Minimal Impact (16%)

- Neutral - some will see it negatively but some will favor it. Depends on regulations to implement
- I don't see this as having a significant impact on tourism in the region
- It probably wont affect overall visitation levels



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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