

# DESTINATION NEXT

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## Maine Statewide Assessment – Greater Portland & Casco Bay

June 8, 2018

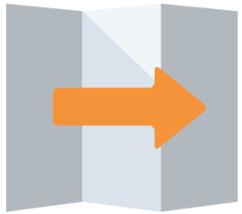


**Paul Ouimet**

# DestinationNEXT

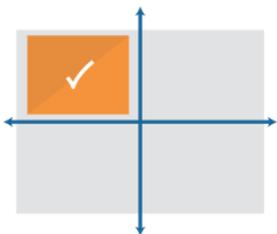
## Vision:

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

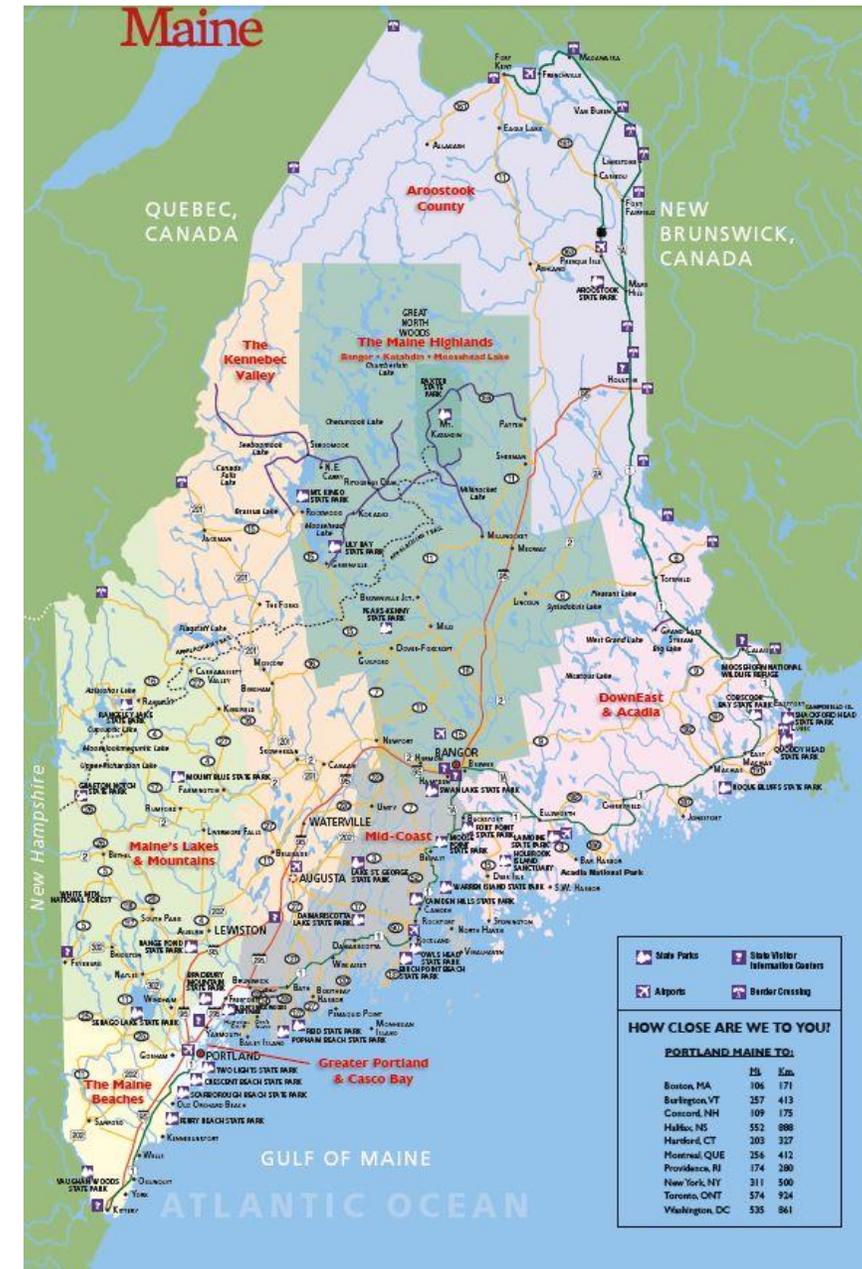
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

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

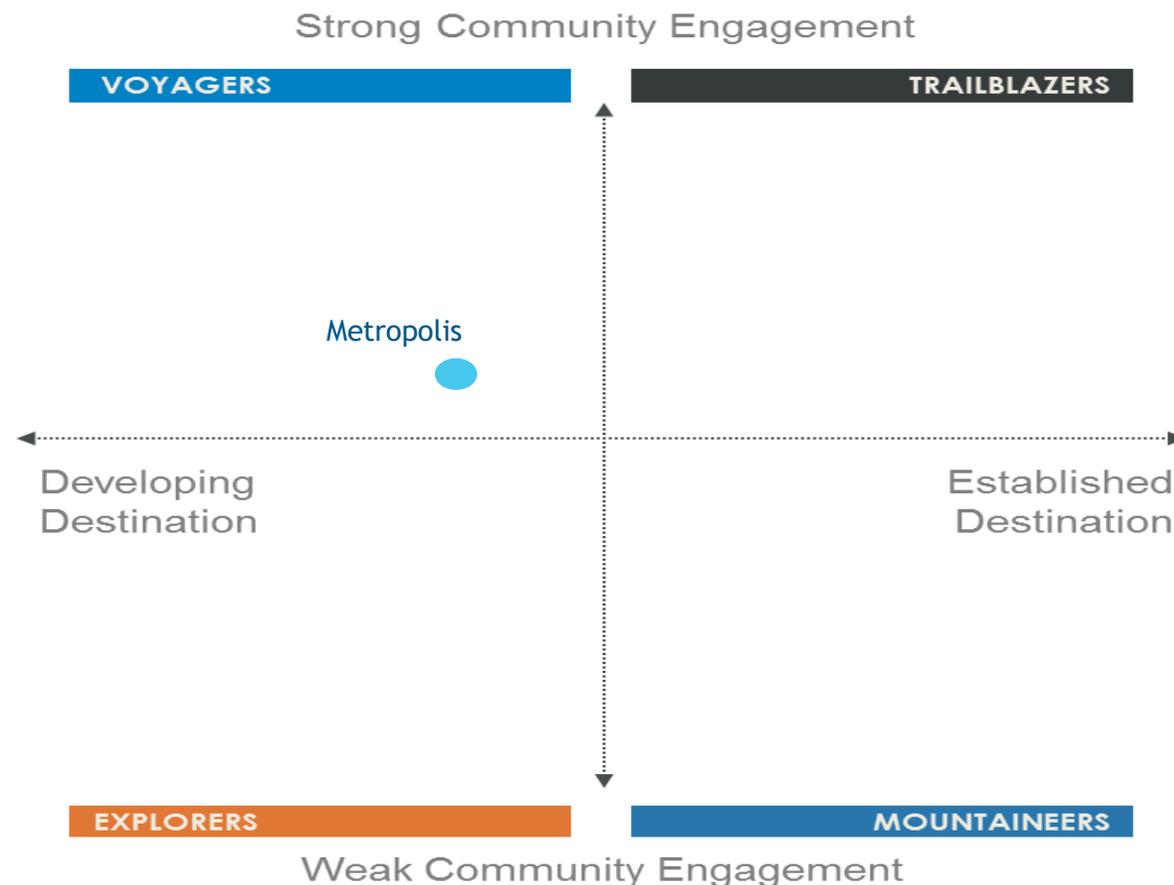
# Scenario Model



# 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

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

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Dominican Republic, El  
Salvador, Ecuador  
South Africa

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

# United States



# Canada



# Latin America



# Europe



# Asia/Australia



# Regional Assessments



**Northwest Florida  
Tourism Coalition**

**South Africa  
Convention Bureau**

# Global **Results**

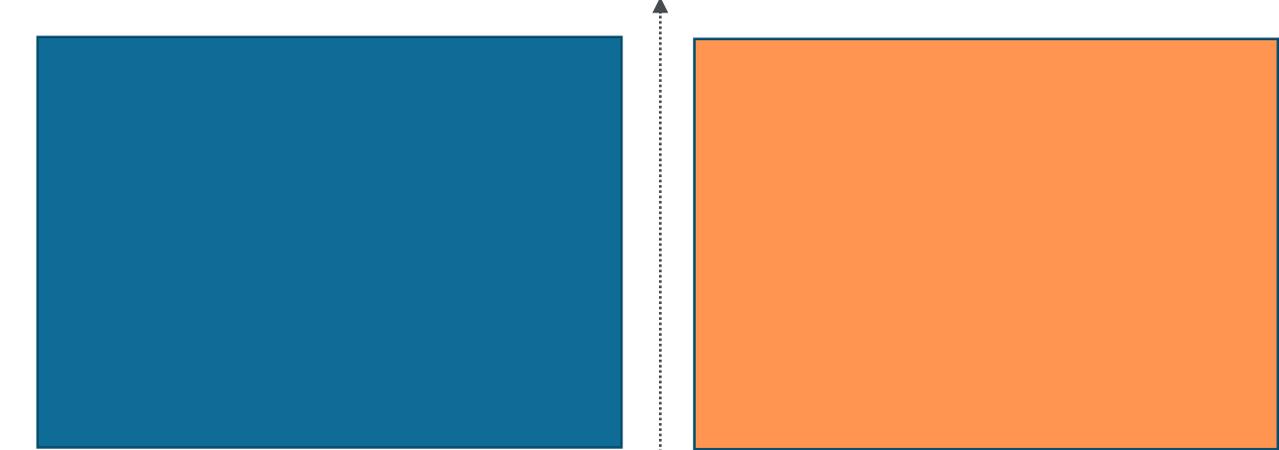
# Scenario Model

**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

1<sup>st</sup>



Destination Performance

2<sup>nd</sup>



Attractions & Entertainment

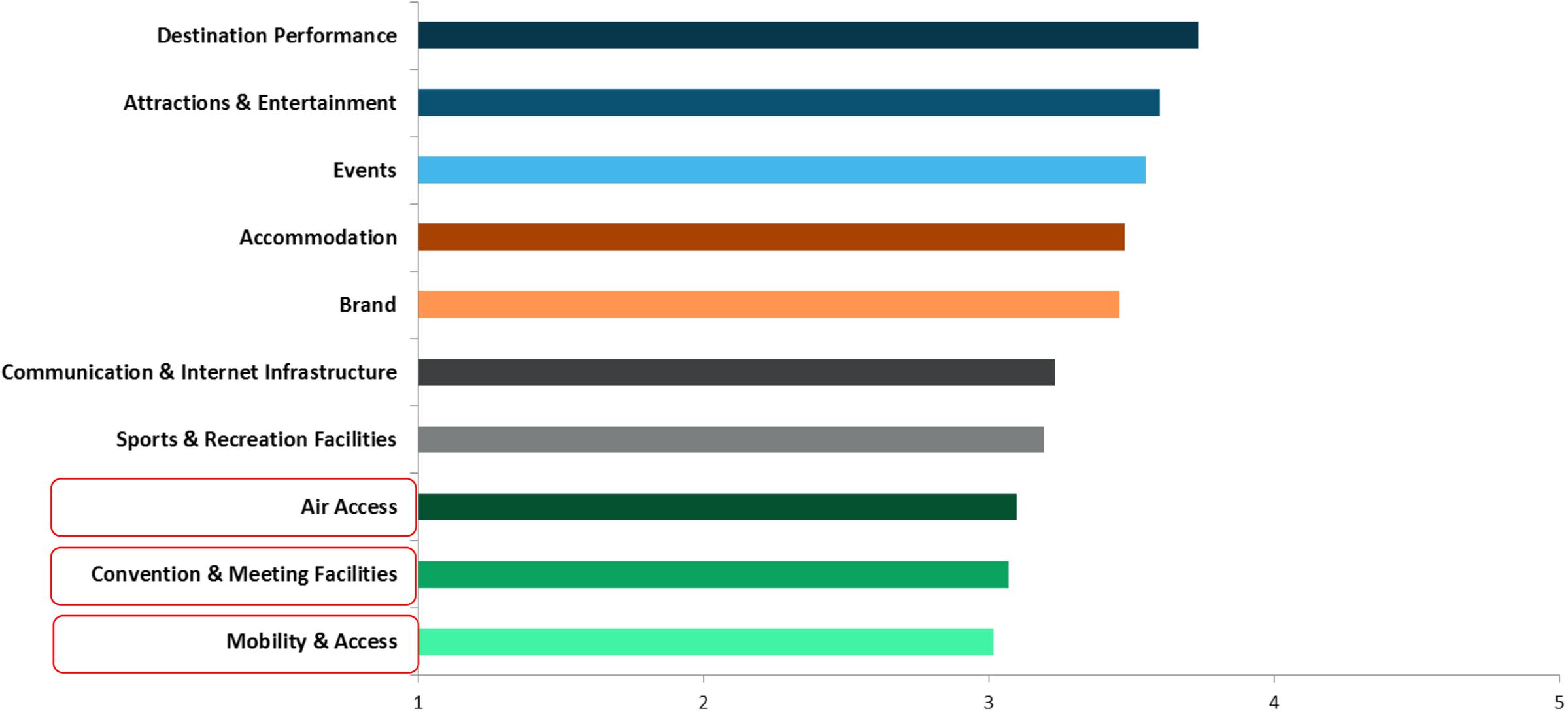
3<sup>rd</sup>



Accommodation

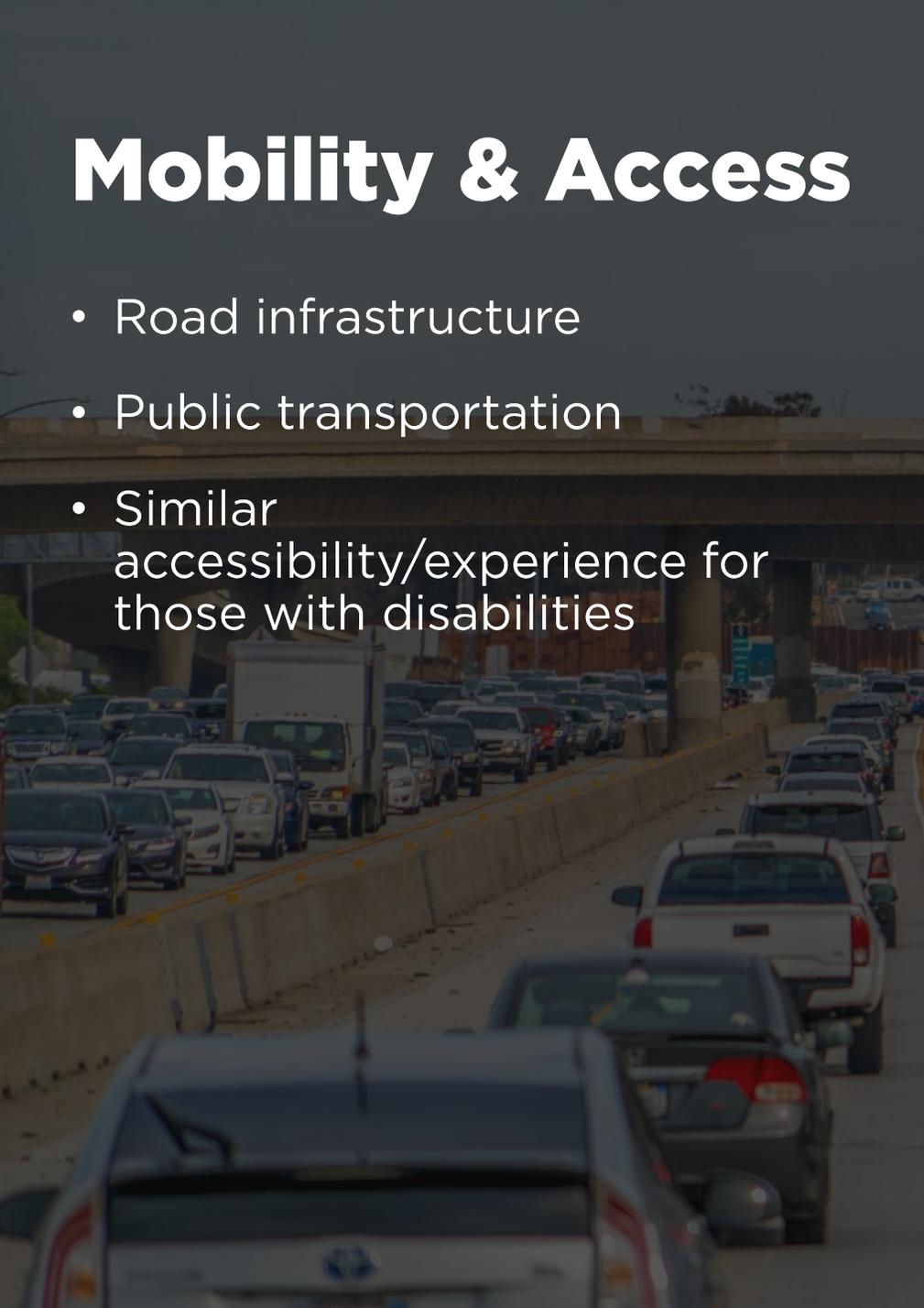
4<sup>th</sup>

# 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



Funding Support & Certainty

Relative Importance

1<sup>st</sup>



Industry Support

2<sup>nd</sup>



Effective Destination Organization  
Governance Model

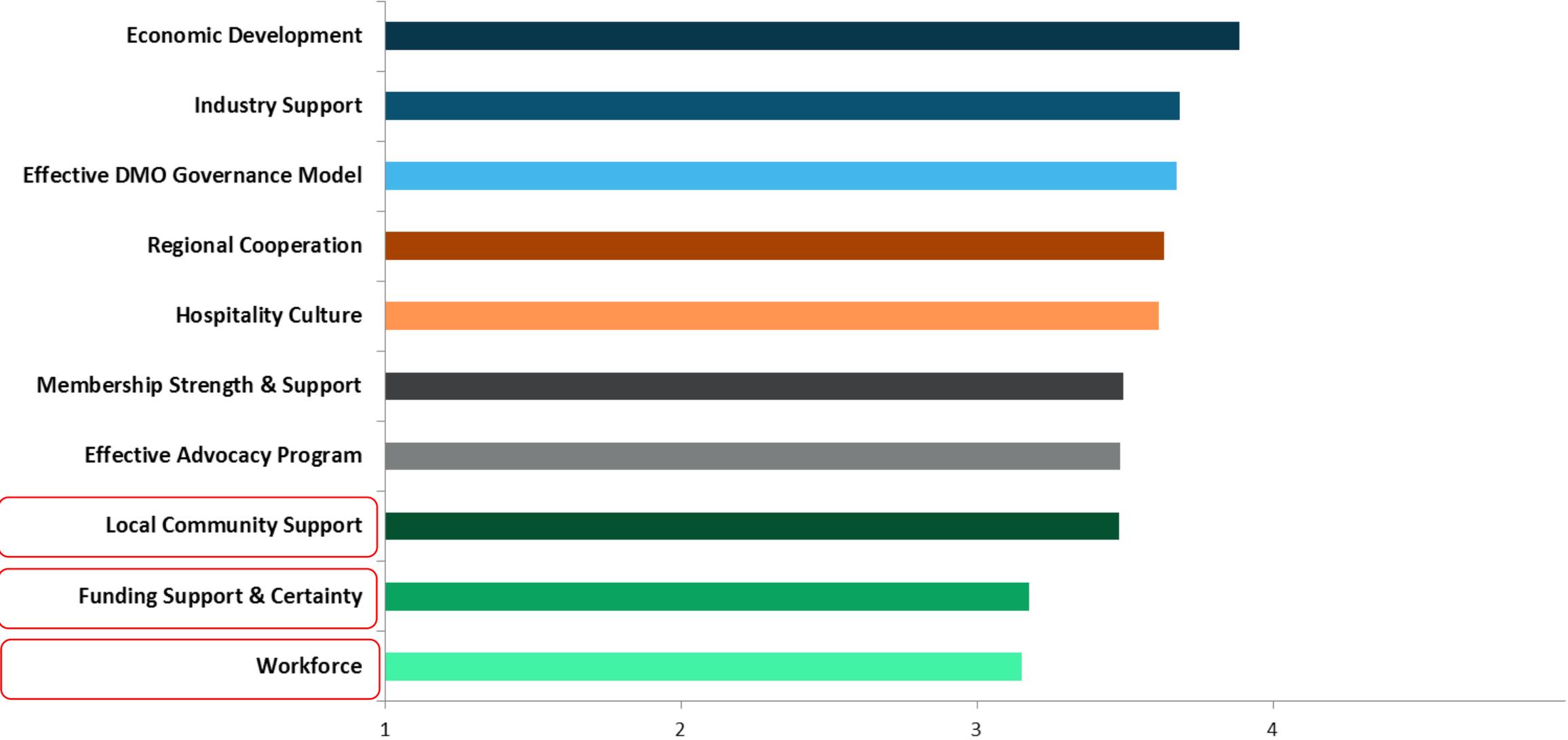
3<sup>rd</sup>



Local Community Support

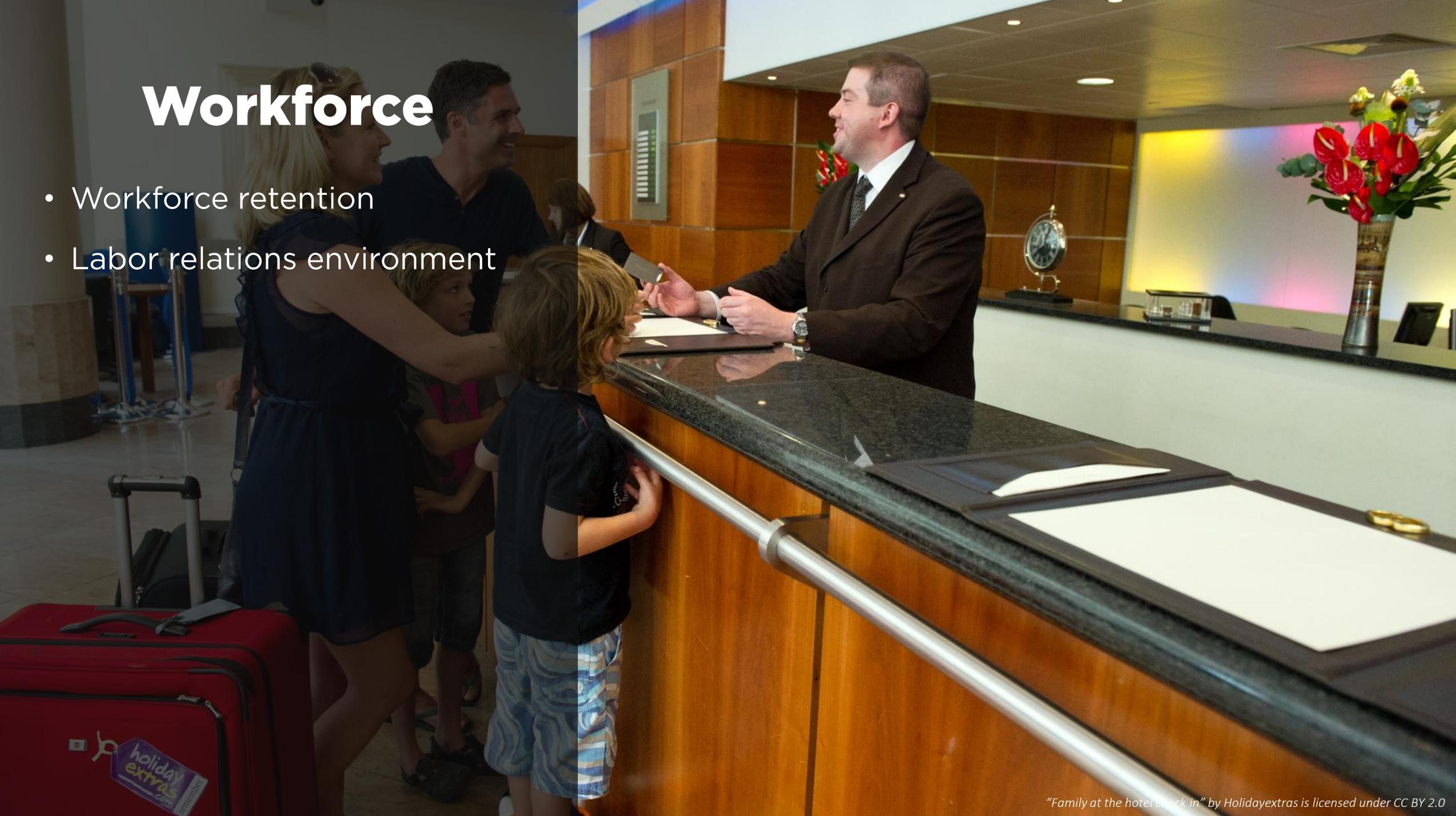
4<sup>th</sup>

# Community Support & Engagement Performance



# Workforce

- Workforce retention
- Labor relations environment



# Funding Support & Certainty

- Sufficient revenue sources
- Stable revenue sources



# Local Community Support

- Support from local residents and media



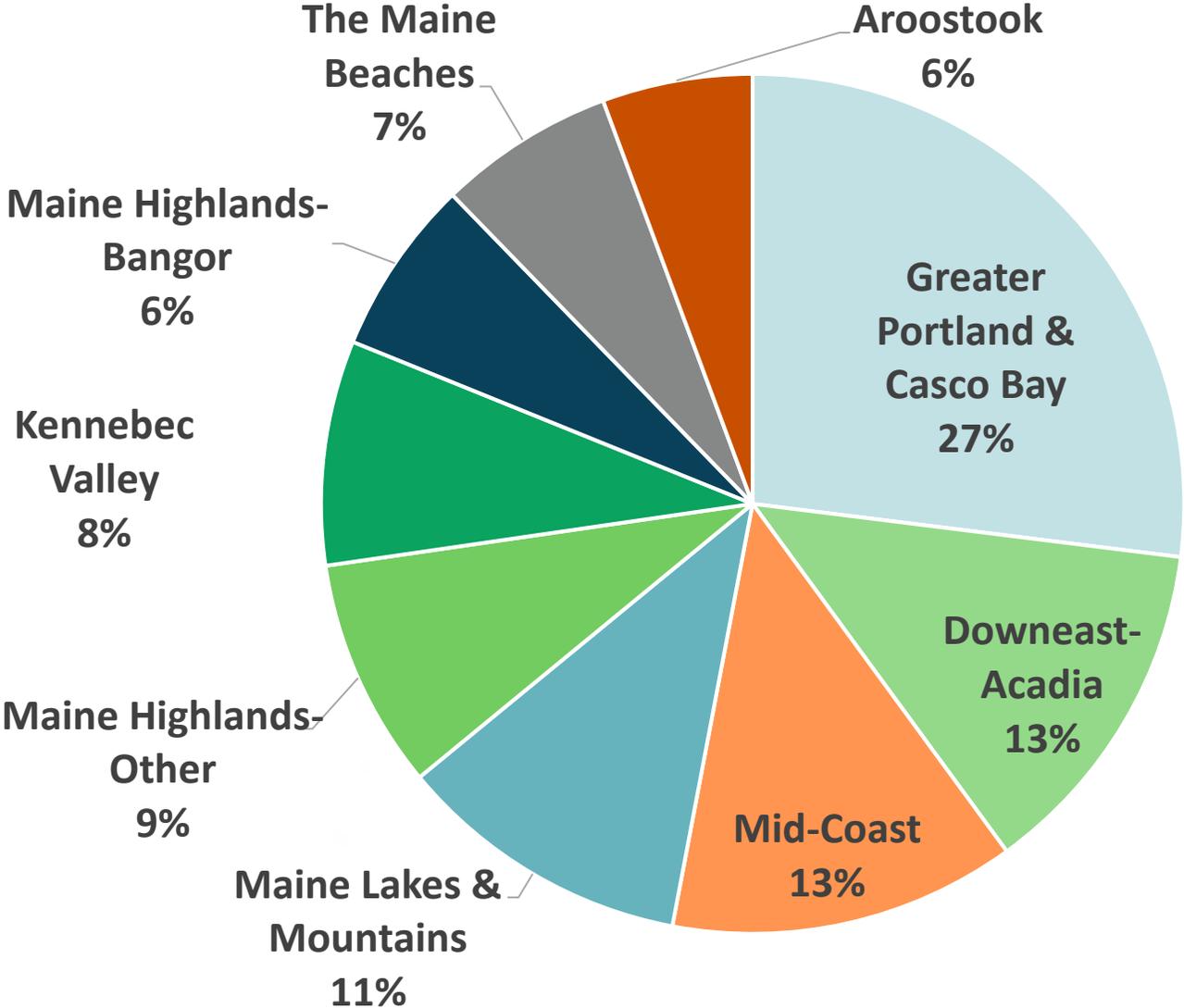
# DESTINATION NEXT

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

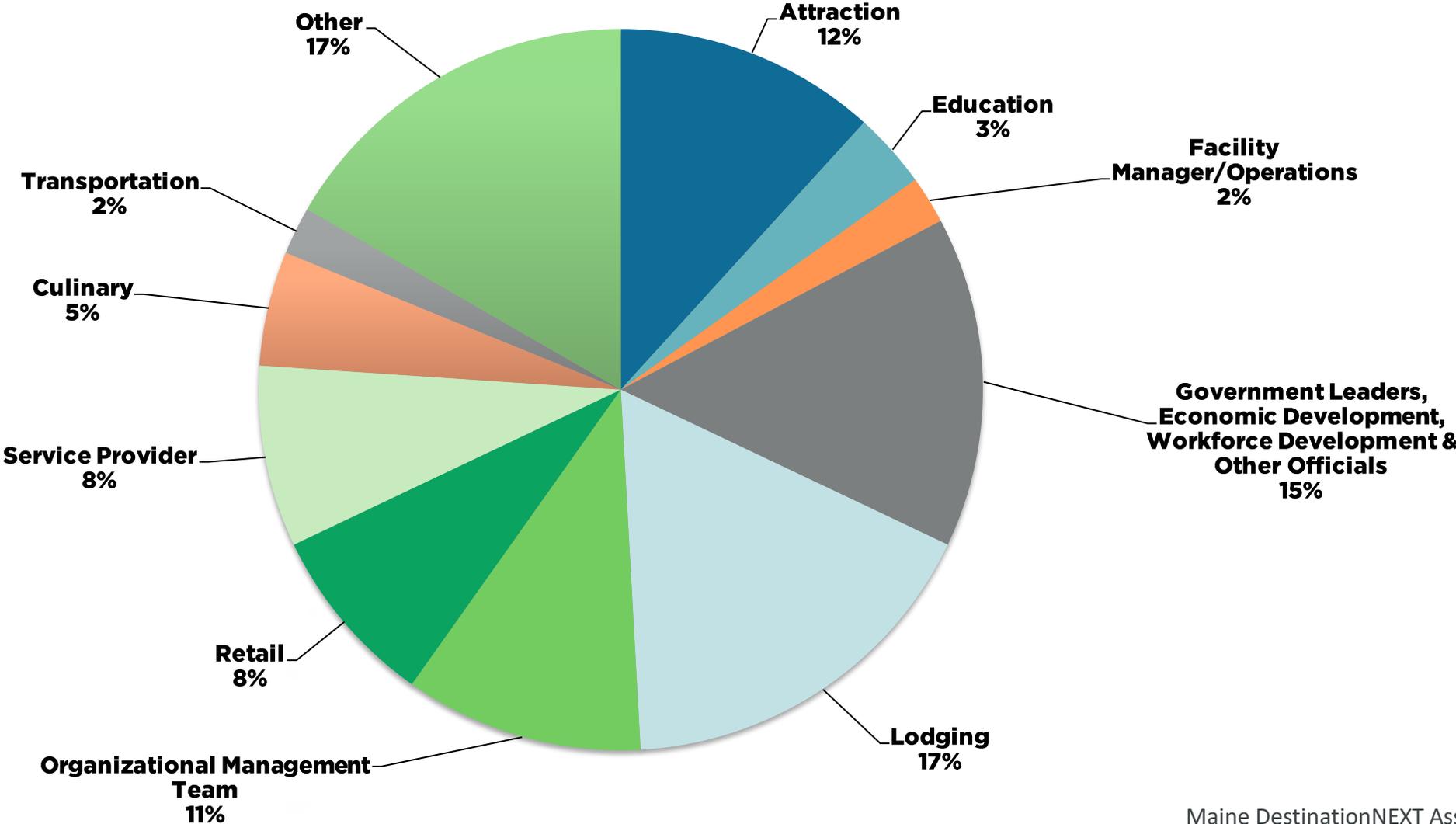
March 29, 2018



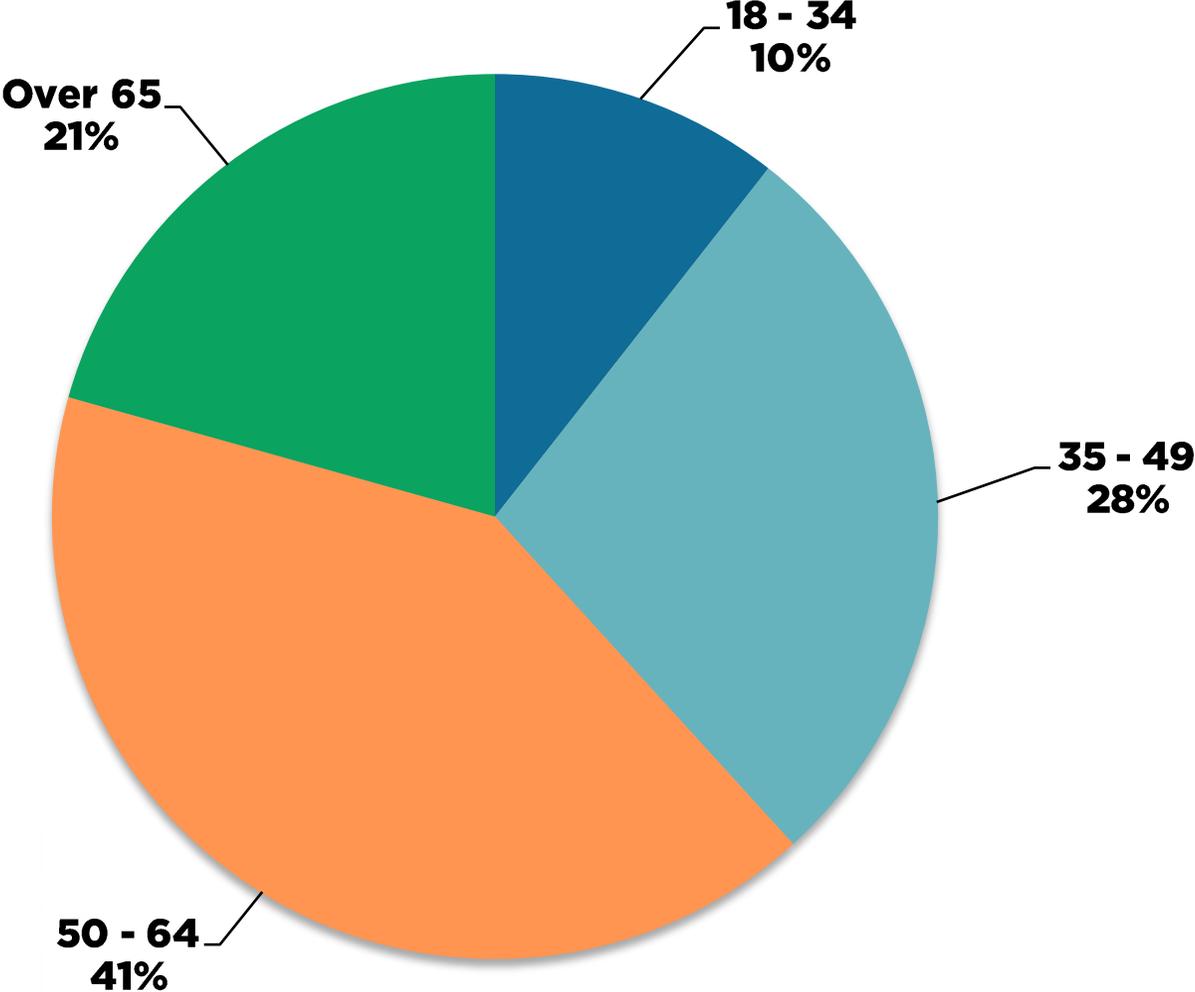
# 1,033 Responses - by Region



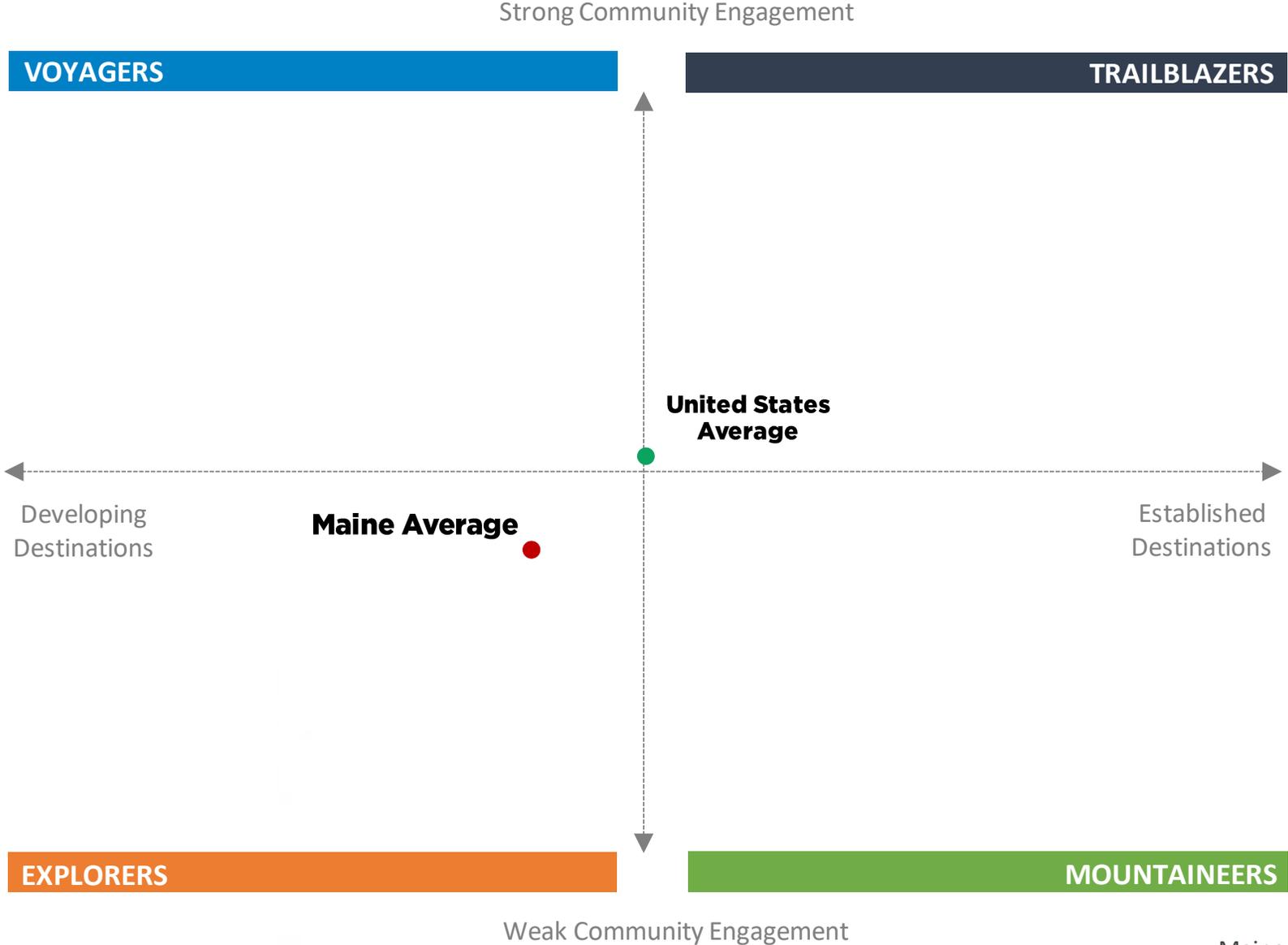
# 1,033 Responses – By Stakeholder



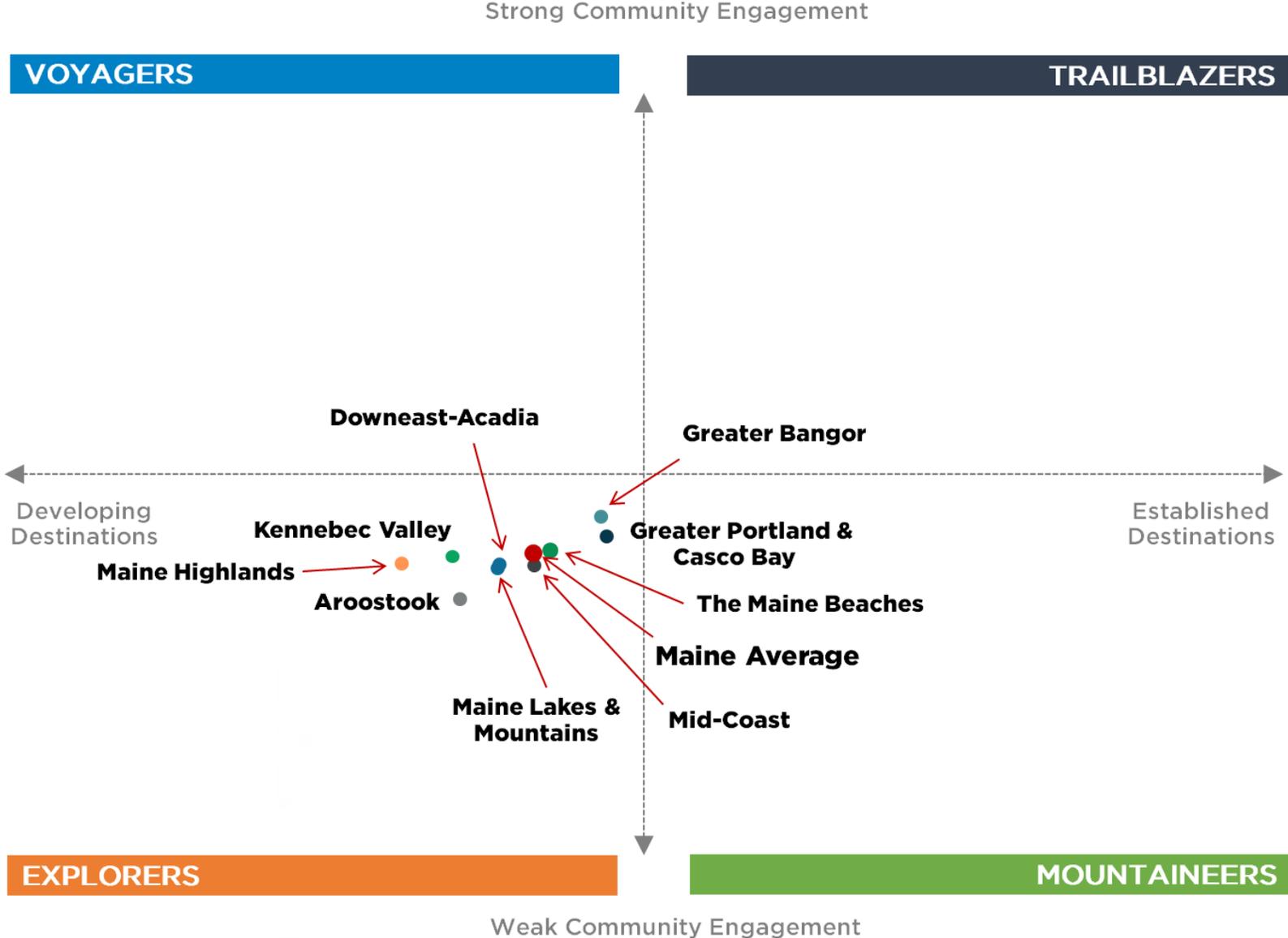
# Age Demographic



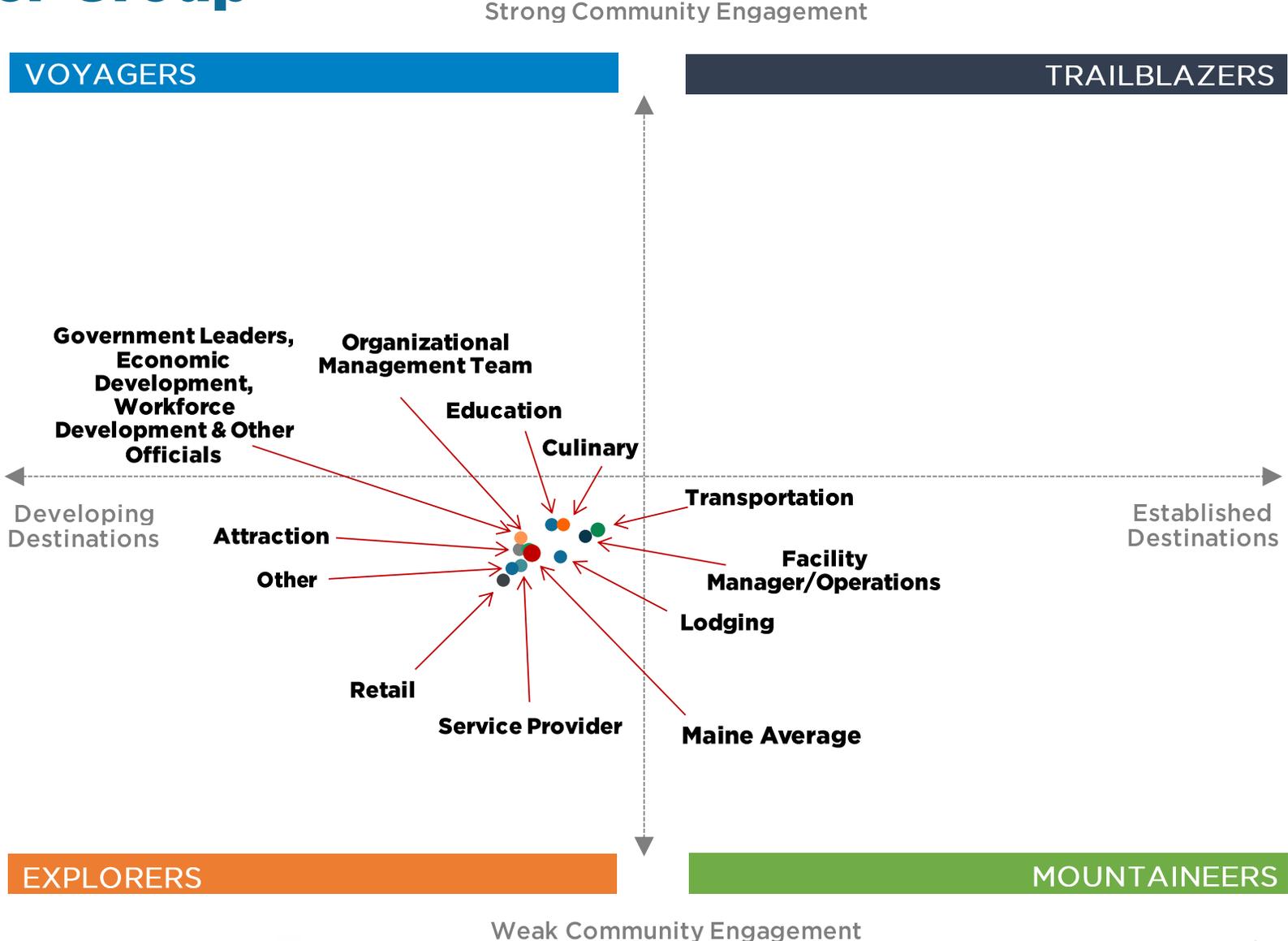
# State of Maine Overall Assessment - Industry



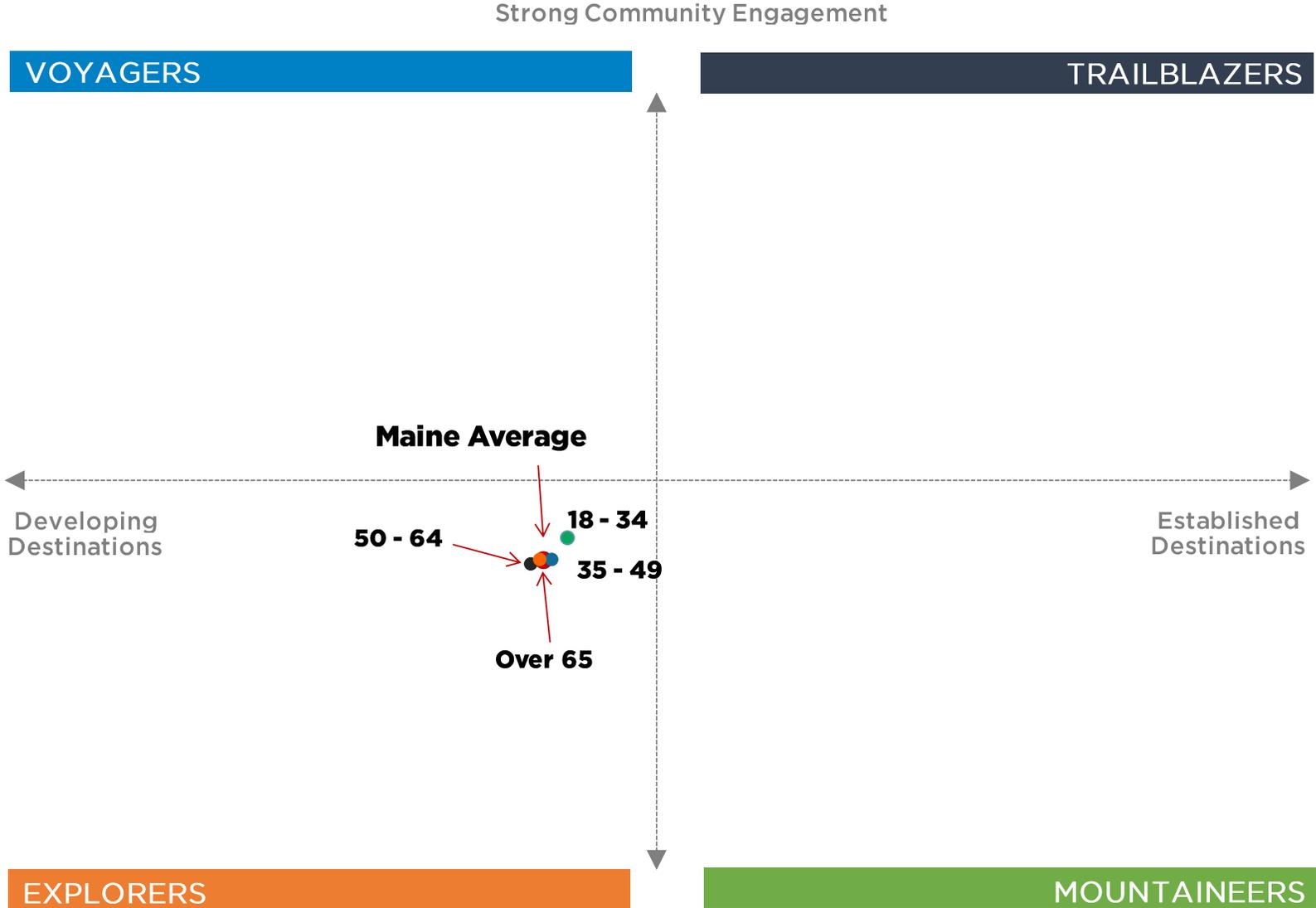
# State of Maine Overall Assessment – Regions



# State of Maine Overall Assessment – Stakeholder Group



# State of Maine Overall Assessment – Age



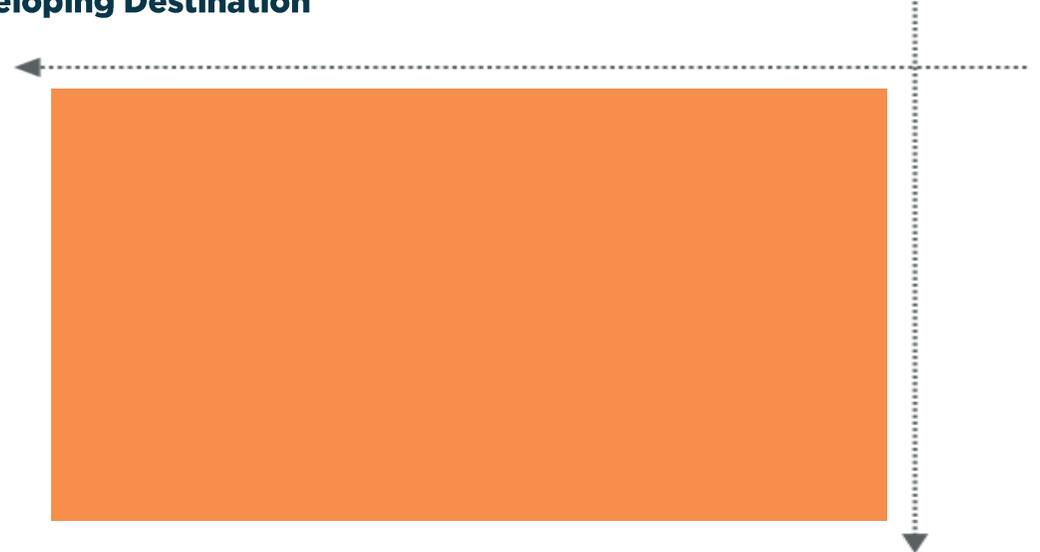
# Explorers

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

## Key Strategic Challenges

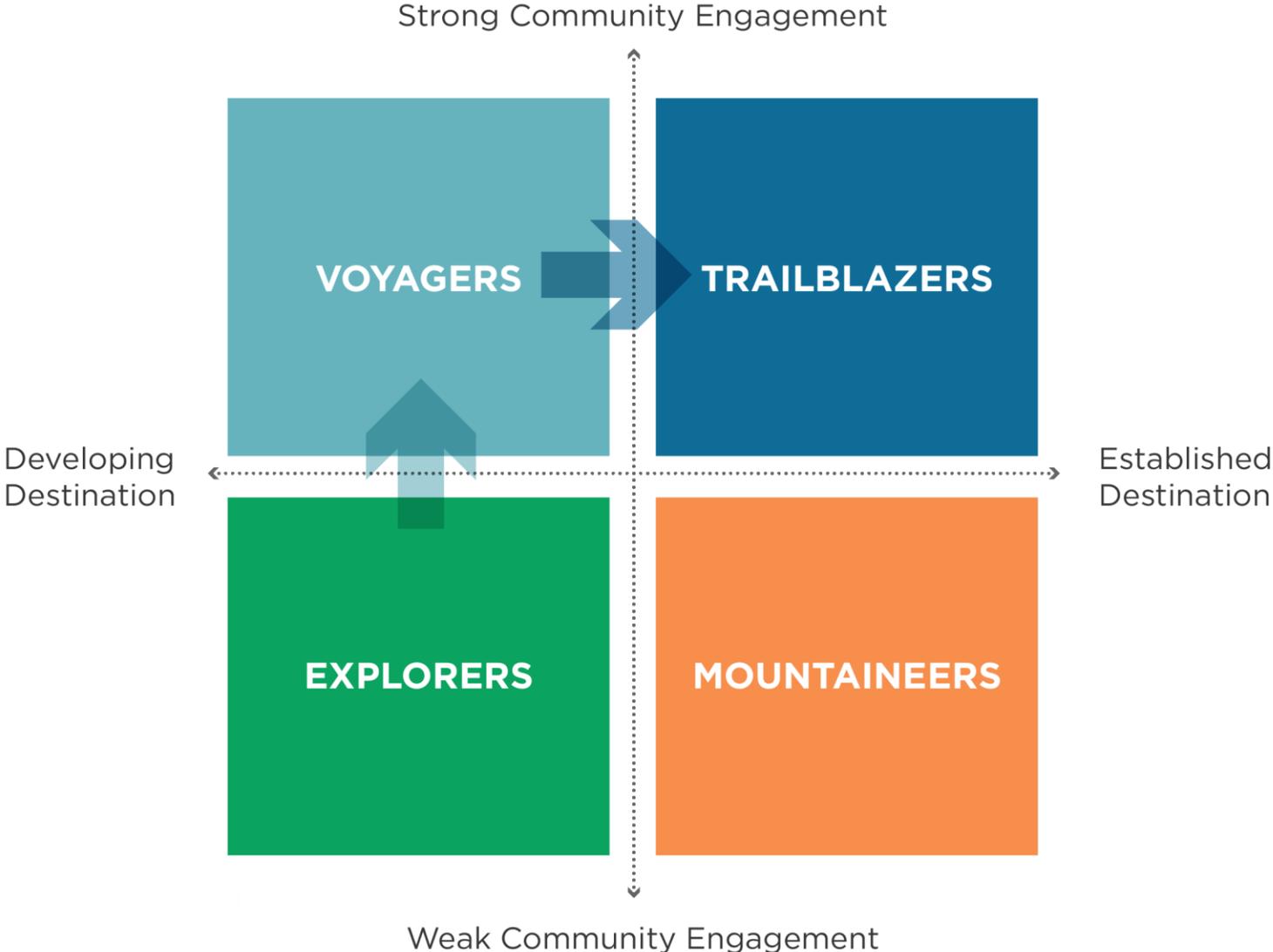
- **Rallying the community to work together towards a realistic vision and strategy**
- **Building community recognition and acceptance that transformational change is needed**
- **Implementing the strategy with limited resources**

**Developing Destination**

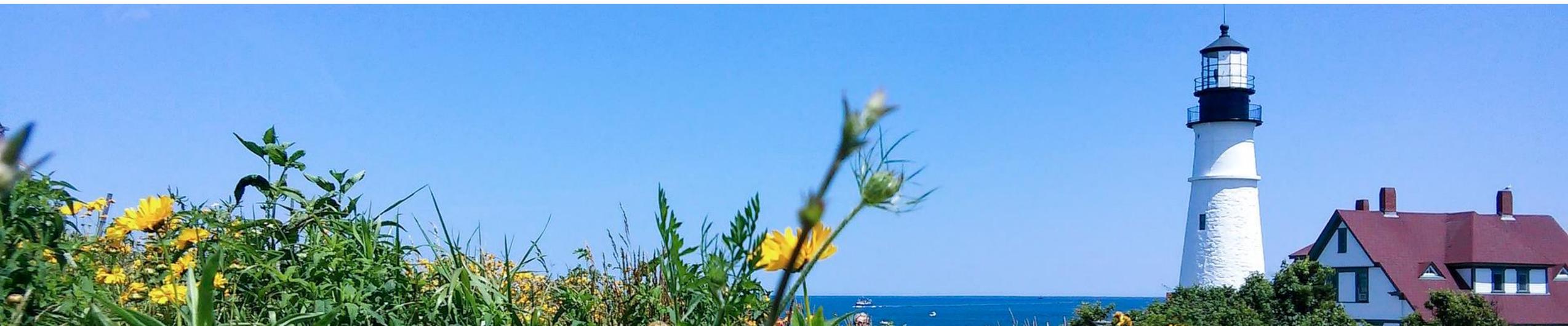


**Weak Community Engagement**

# 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.**  
**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

<b>COMMUNITY SUPPORT &amp; ENGAGEMENT - 0</b>	<b>3.25</b>
<b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.60</b>

## RESULTING SCENARIO EXPLORERS

**Note**

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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
<b>COMMUNITY SUPPORT &amp; ENGAGEMENT - Maine Average</b>										<b>3.25</b>
<b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b>										<b>3.60</b>

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

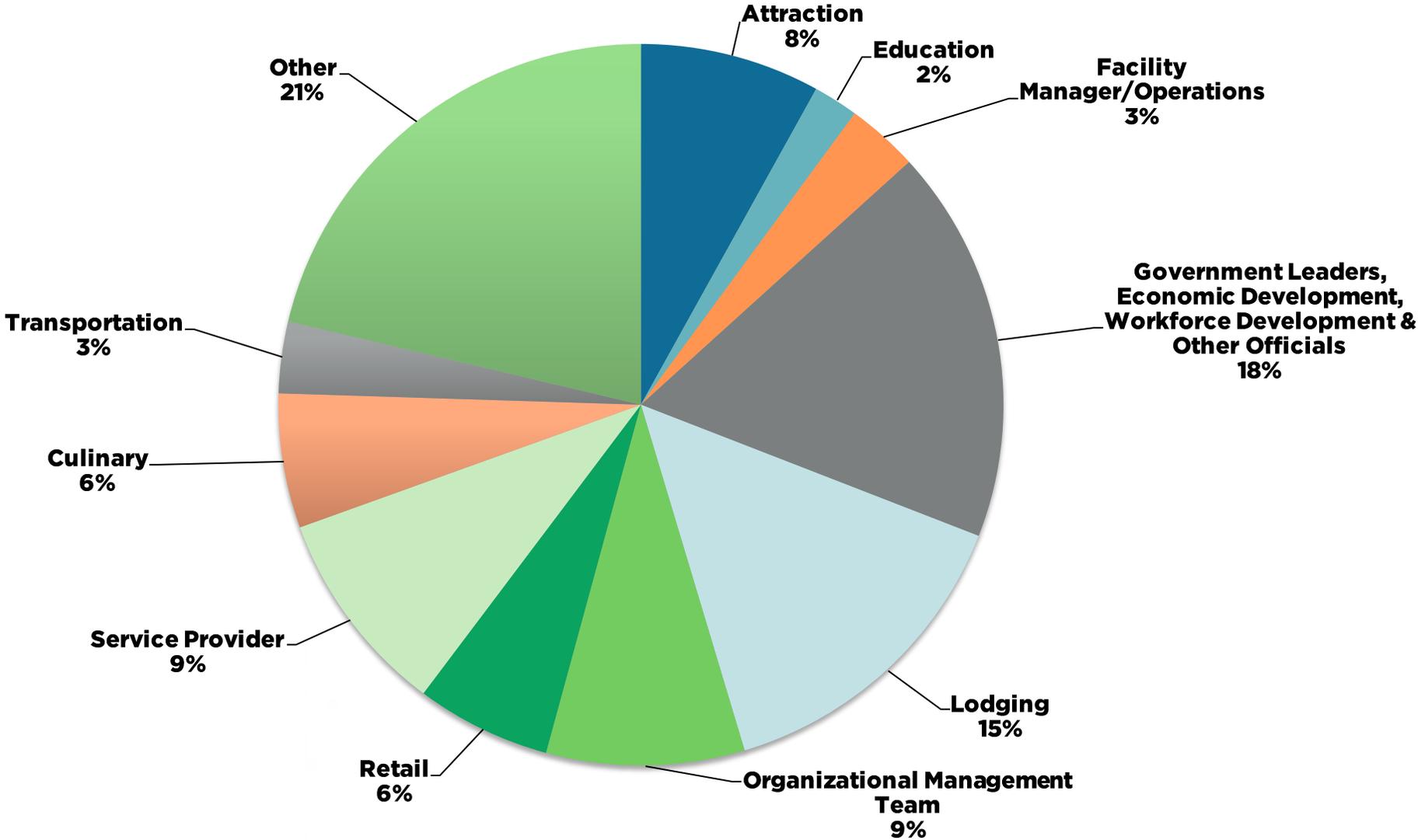
Multi-User Online Diagnostic  
Tool Results:

Greater Portland & Casco Bay

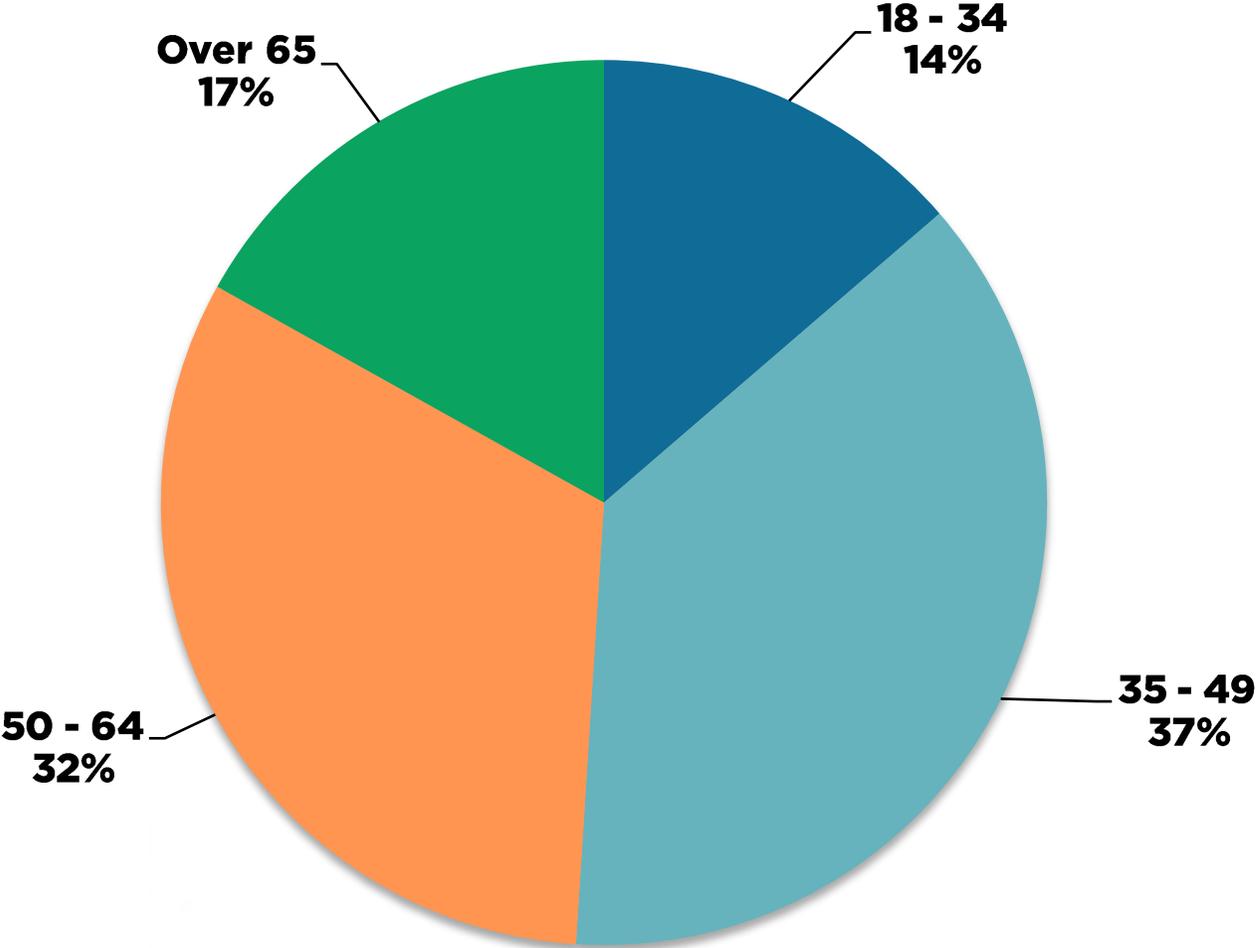
June 8, 2018



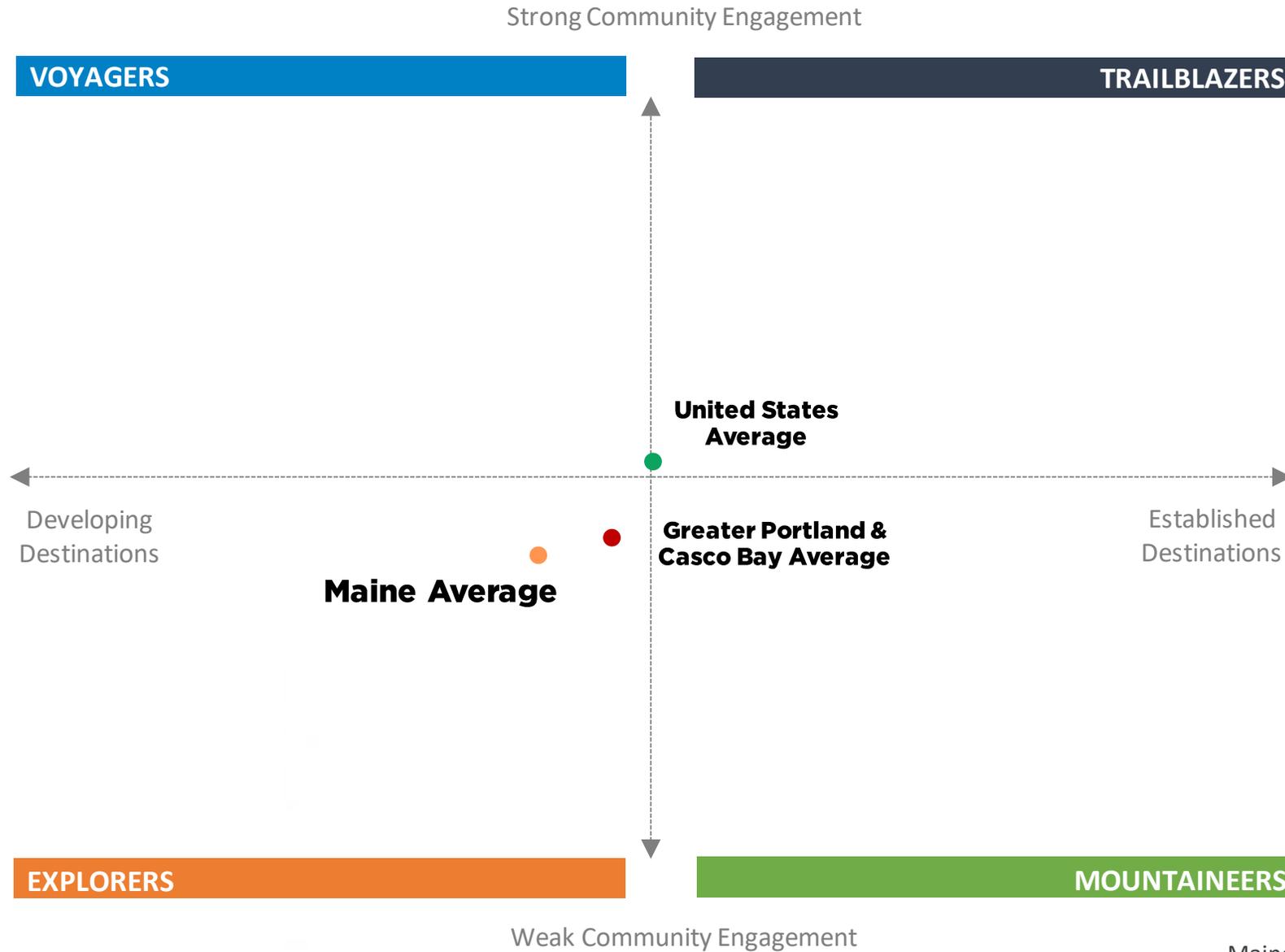
# 249 Responses



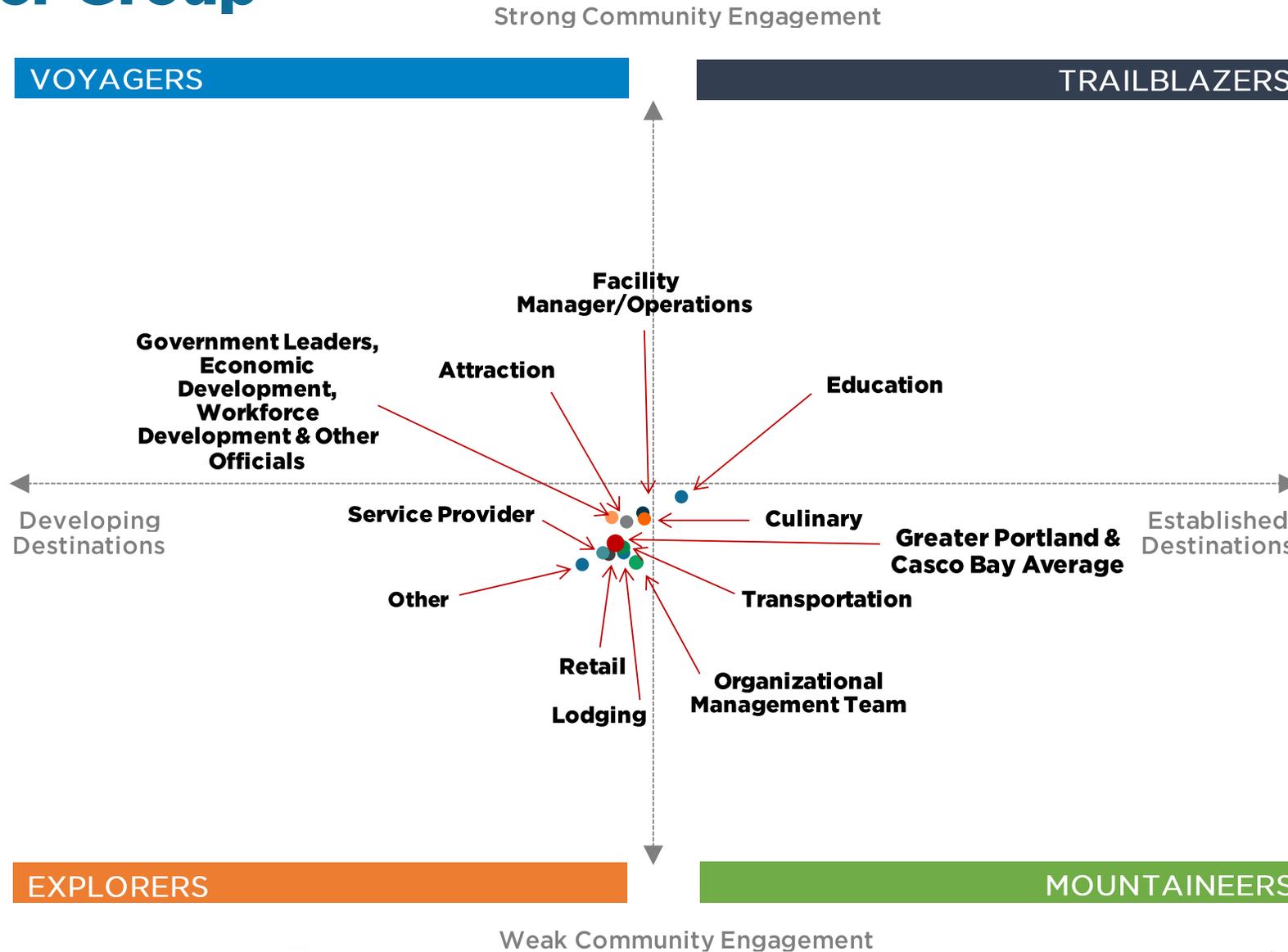
# Age Demographic



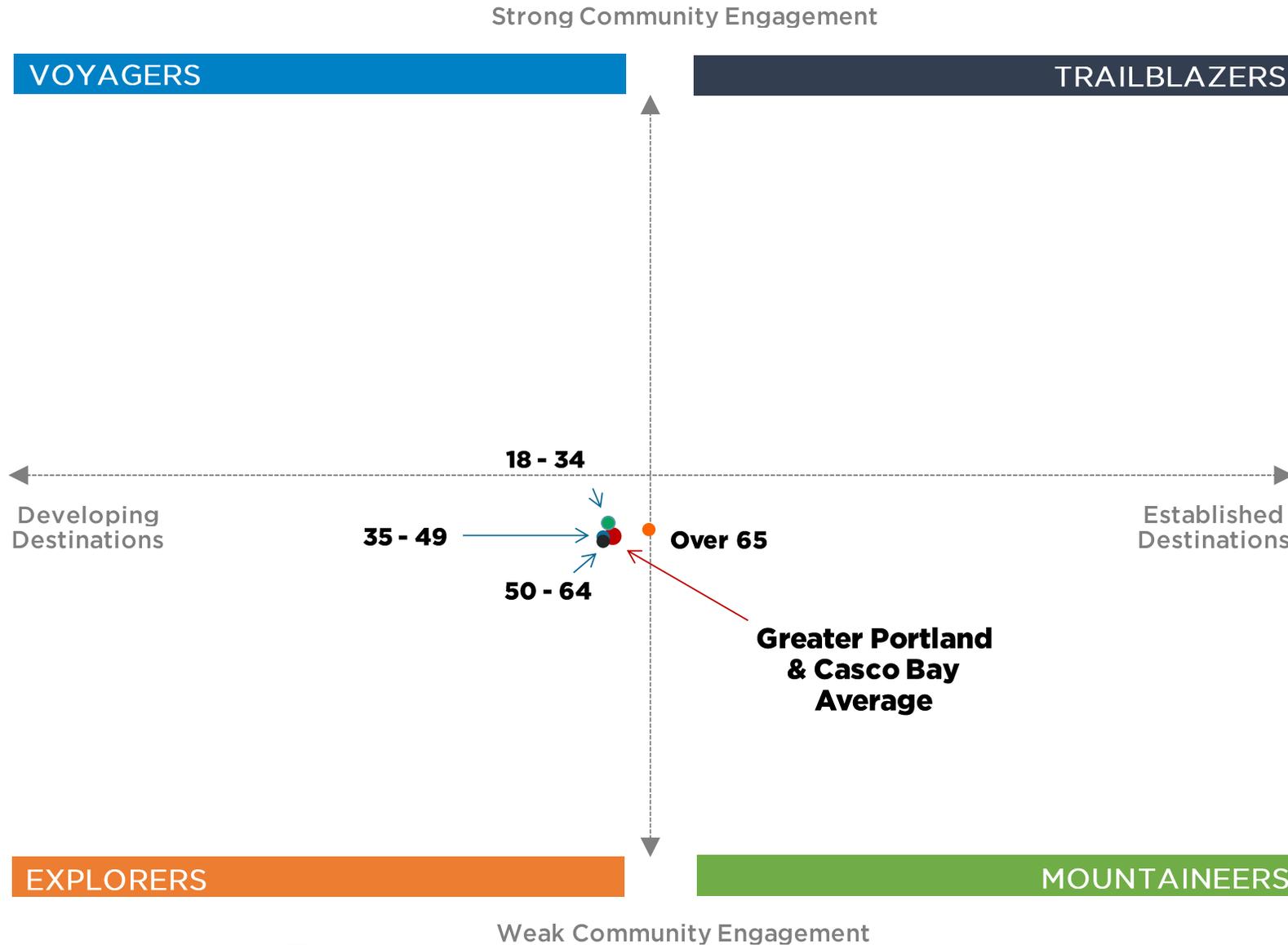
# Greater Portland & Casco Bay Overall Assessment - Industry



# Greater Portland & Casco Bay Overall Assessment - Stakeholder Group



# Greater Portland & Casco Bay Overall Assessment - Age



# Destination Strength Rankings – Greater Portland & Casco Bay



	Relative Importance	Perceived Performance
 Convention & Meeting Facilities	1 <sup>st</sup>	8 <sup>th</sup>
 Attractions & Entertainment	2 <sup>nd</sup>	1 <sup>st</sup>
 Accommodation	3 <sup>rd</sup>	4 <sup>th</sup>
 Destination Performance	4 <sup>th</sup>	2 <sup>nd</sup>

# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Greater Portland & Casco Bay Average	Standard Deviation	Industry Average	Greater Portland & Casco Bay Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.2%	1%	3.11	2.87	0.48
Attractions & Entertainment	10.8%	10.7%	1%	3.65	3.95	0.57
Accommodation	10.5%	10.6%	1%	3.54	3.41	0.54
Destination Performance	10.0%	10.5%	1%	3.88	3.50	0.63
Mobility & Access	10.1%	10.4%	1%	3.12	2.85	0.71
Sports & Recreation Facilities	9.4%	10.1%	1%	3.29	3.35	0.60
Brand	10.5%	9.6%	1%	3.49	3.47	0.51
Events	9.7%	9.3%	1%	3.63	3.36	0.66
Communication & Internet Infrastructure	10.1%	8.8%	1%	3.39	3.02	0.76
Air Access	9.2%	8.7%	2%	3.16	3.35	0.40

<b>DESTINATION STRENGTH - Greater Portland &amp; Casco Bay</b>	<b>3.31</b>
<b>INDUSTRY AVERAGE DESTINATION STRENGTH</b>	<b>3.49</b>

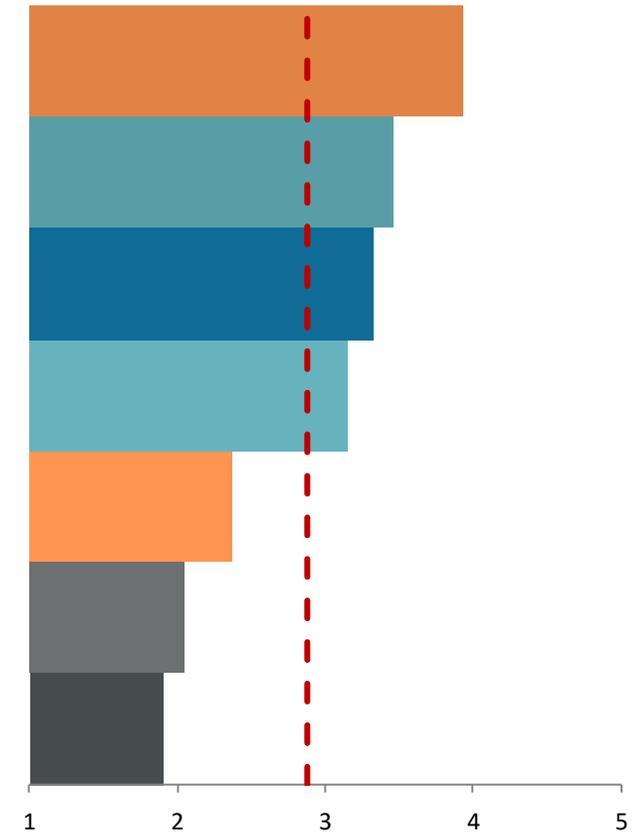
**RESULTING SCENARIO** **EXPLORERS**

**Note**

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# Convention & Meeting Facilities

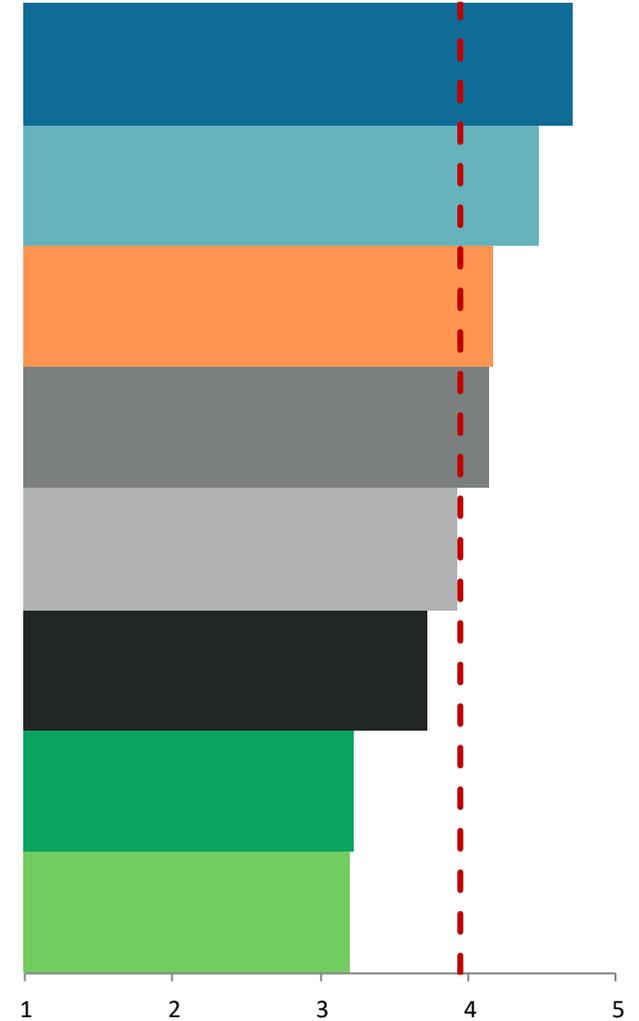
- The addition of a convention center in Southern Maine would improve the destination
- Where possible, hotels/other meeting venues take full advantage of the views
- Has good, unique off-site venues for special events
- Offers an abundance of professional and experienced convention and/or meeting services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



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

# Attractions & Entertainment

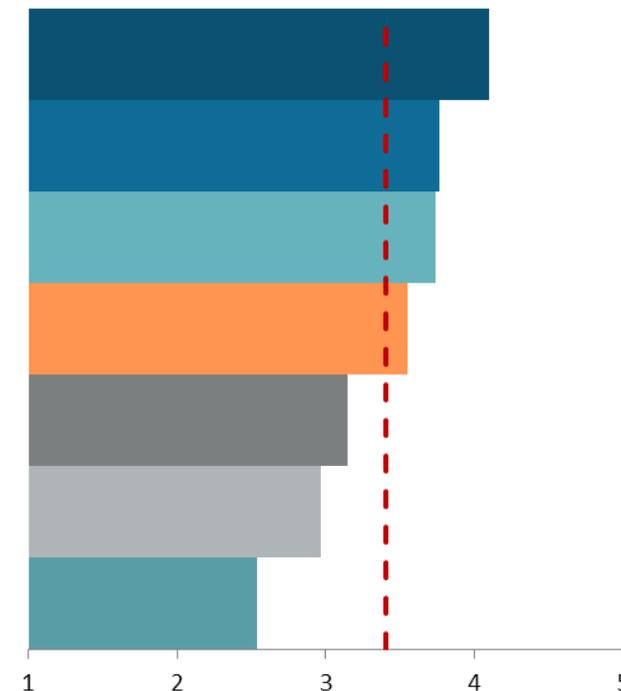
- Has unique and high-quality dining options
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has high-quality and wide-ranging arts and cultural attractions
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic 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.

# Accommodation

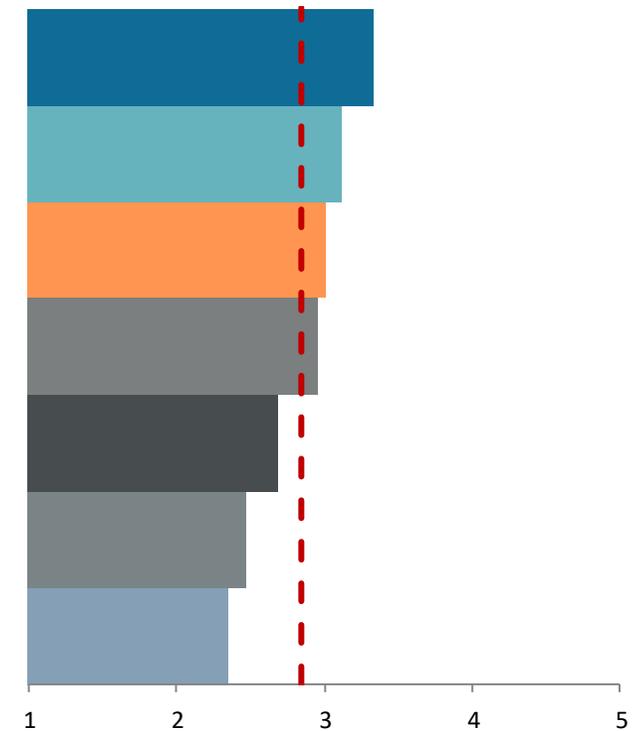
- Has a healthy presence of well-known brand name hotels
- Has adequate hotel accommodations capacity
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Offers a diversity of accommodation price options
- Has a sufficient number of large, headquarter hotels
- The increase of short-term housing rentals in the market has not affected the current housing accommodation offering



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

# Mobility & Access

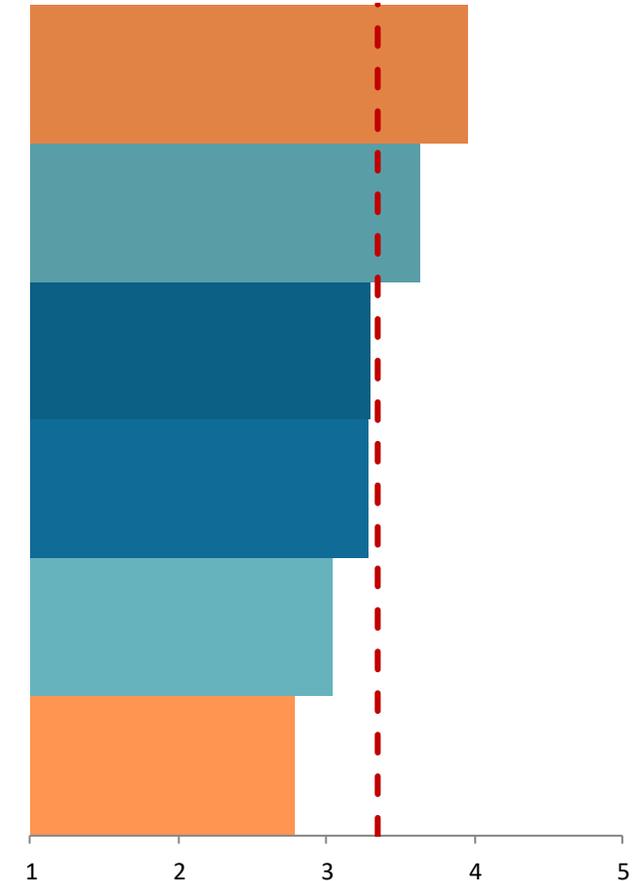
- Has adequate water access that makes it easy for visitors to get around
- Has adequate bike paths/pedestrian walkways that makes it easy for visitors to get around
- There are a number of sufficient and visible information centers available to tourists
- Has great directional signage and highways that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

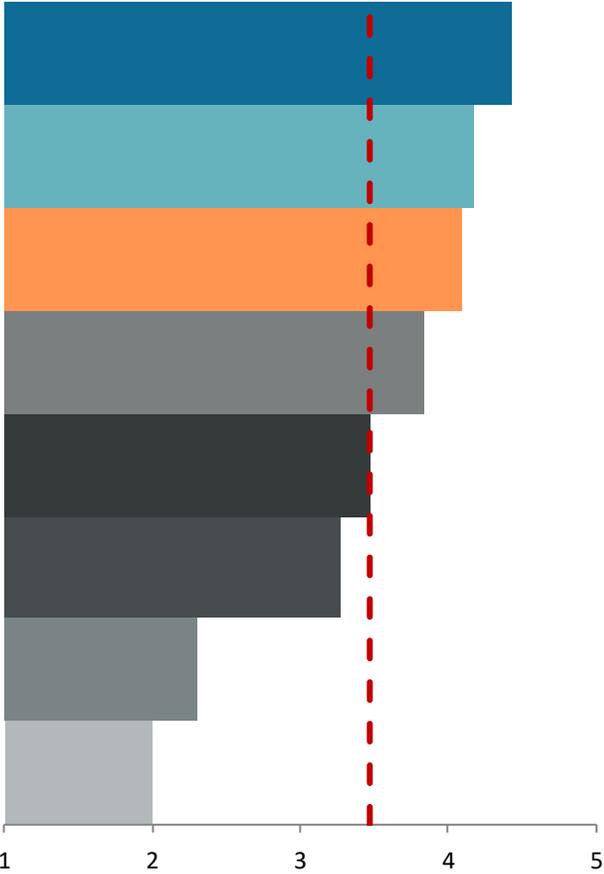
- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- Has the sports fields and availability to host major amateur and/or collegiate sporting events
- Leadership representing sports and recreational facilities are engaged and helpful in pursuing recreational and sporting events for the region
- The Maine Sports Commission is a useful resource and is properly utilized throughout the region
- 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 having a lot of things to see and do
- Is known for being safe, clean, and secure for visitors
- Is known for being environmentally conscious and sustainable
- Appeals to a diverse range of visitors
- Has an effective region-wide marketing message
- Is prepared for international tourism with adequate translations and guides
- Panhandling does not affect the experience of the destination



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

# Events

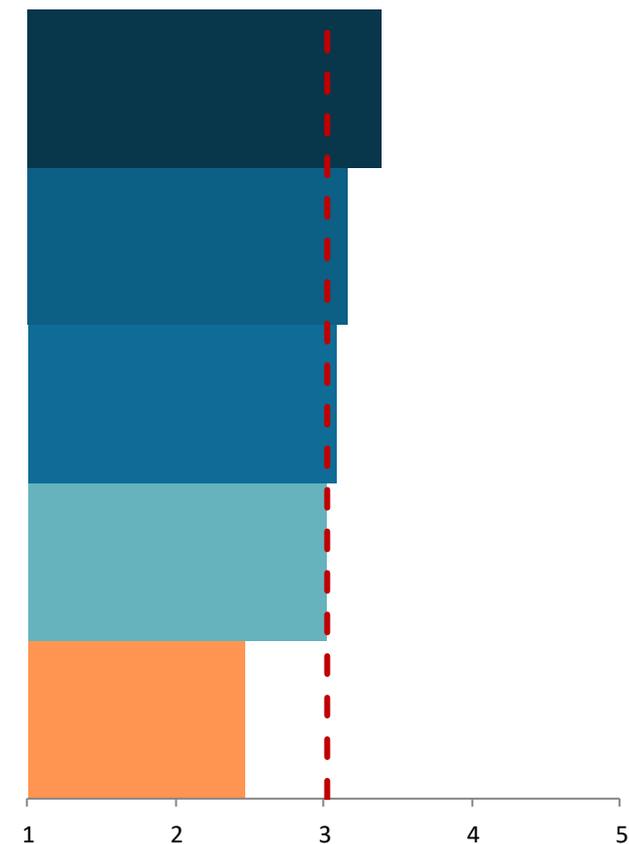
- Has an abundance of parks and outdoor spaces for handling special events
- Offers major events that attract non-local visitors
- The citizens of the region are supportive of hosting major sporting/national or international events
- Local venues produce numerous public/lifestyle shows throughout the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

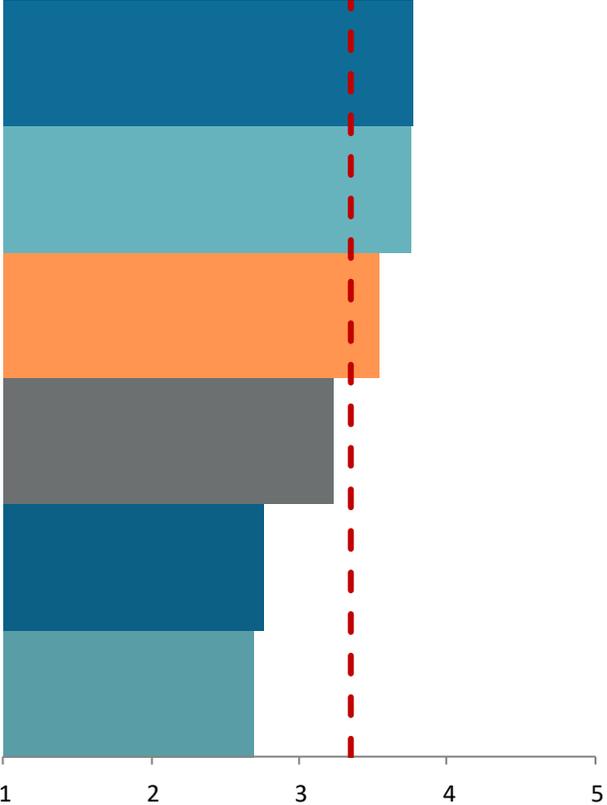
- Tourism industry uses and leverages social media to support the brand and market
- Businesses have access to good broadband capacity to be able to run their businesses effectively
- There is reliable mobile phone service covering all of the region's attractions
- There is substantial Wi-Fi access in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



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

# Air Access

- Local airport offers a "sense of place" that supports the brand and promotes the region and state
- Local airport has the facilities to grow tourism in the region
- 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.

# Community Support & Engagement - Greater Portland & Casco Bay



Local Community Support

Relative Importance

1<sup>st</sup>

Perceived Performance

5<sup>th</sup>



Industry Support

2<sup>nd</sup>

3<sup>rd</sup>



Hospitality Culture

3<sup>rd</sup>

2<sup>nd</sup>



Workforce

4<sup>th</sup>

10<sup>th</sup>

# Community Support & Engagement - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Greater Portland & Casco Bay Average	Standard Deviation	Industry Average	Greater Portland & Casco Bay Average	Standard Deviation
Local Community Support	10.2%	10.7%	6%	3.56	3.49	0.70
Industry Support	9.9%	10.3%	2%	3.81	3.56	0.74
Hospitality Culture	10.2%	10.2%	1%	3.71	3.61	0.79
Workforce	10.1%	10.1%	2%	3.31	2.40	0.69
Funding Support & Certainty	9.9%	10.0%	6%	3.36	2.68	0.83
Economic Development	10.2%	10.0%	2%	3.95	4.11	0.56
Regional Cooperation	10.0%	9.9%	1%	3.76	3.50	0.76
Membership Strength & Support	9.6%	9.8%	2%	3.76	3.41	0.67
Effective Advocacy Program	10.2%	9.8%	1%	3.63	3.29	0.75
Effective DMO Governance Model	9.6%	9.3%	2%	3.80	3.31	0.76

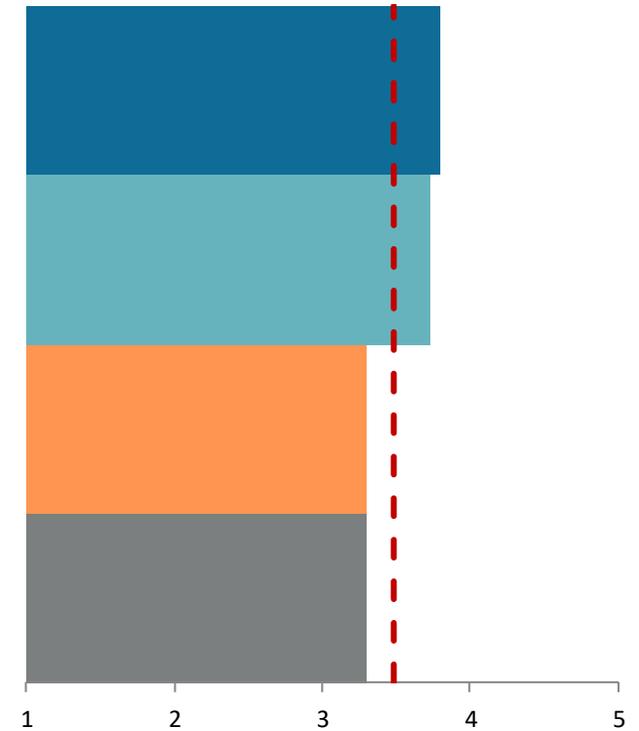
<b>COMMUNITY SUPPORT &amp; ENGAGEMENT - Greater Portland &amp; Casco Bay</b>	<b>3.34</b>
<b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.60</b>

**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.**

# Local Community Support

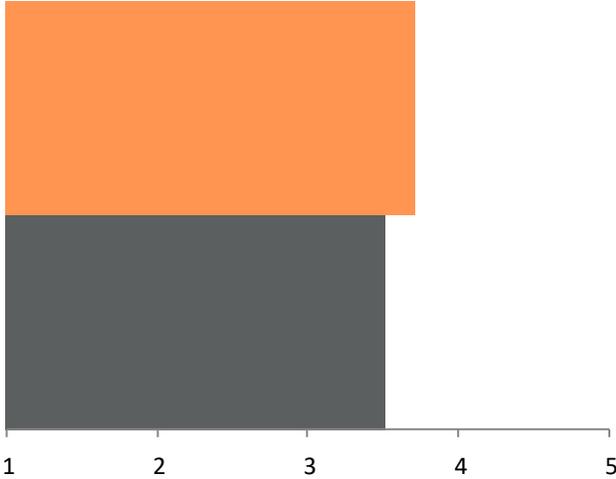
- The region's tourism industry has business support
- The region's tourism industry gets positive media coverage
- Local community in the region have a general understanding and positive perception of the region's tourism industry
- Stakeholders find value in partnerships that include other tourism regions



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

# Industry Support

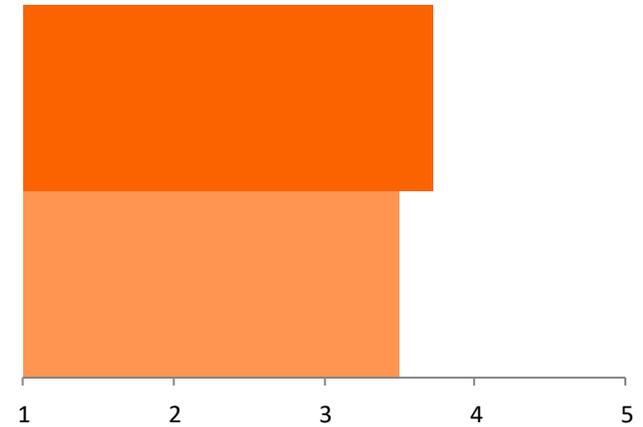
- Tourism industry leaders and stakeholders are supportive of the regional tourism industry
- Tourism industry leaders and stakeholders are investing in activities



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

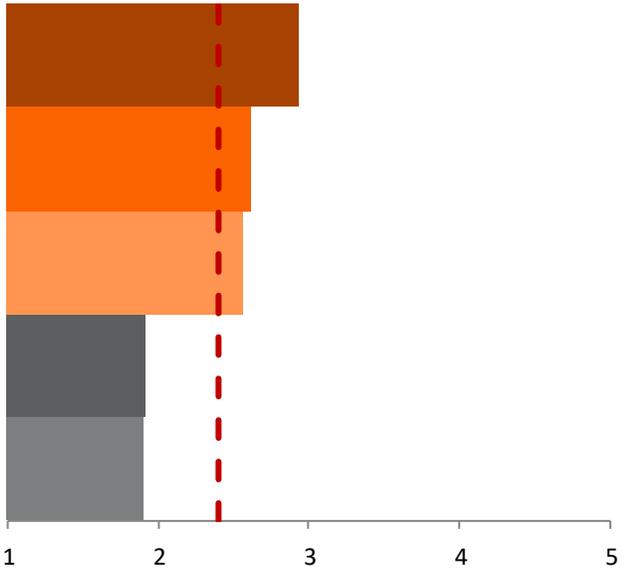
# Hospitality Culture

- 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



# Workforce

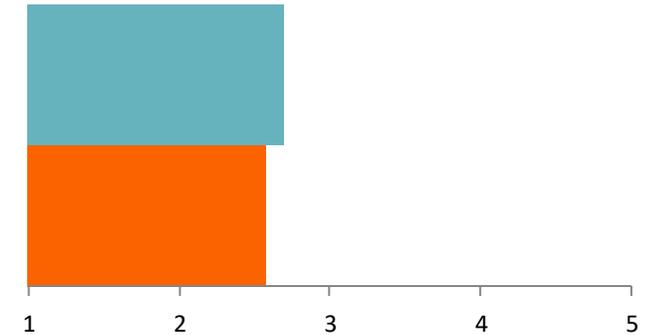
- The region has a strong base of hospitality education programs
- The region’s workforce is stable and has a positive labor relations environment
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The H2B visa restrictions have not affected businesses that cater to tourists or the hospitality industry workforce
- The increase in rents and home prices has not affected the industry in terms of attracting employees



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

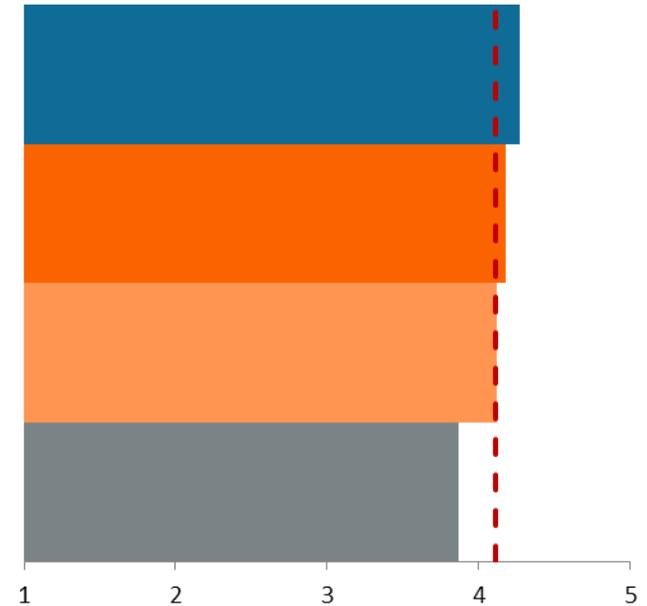
# Funding Support & Certainty

- 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



# Economic Development

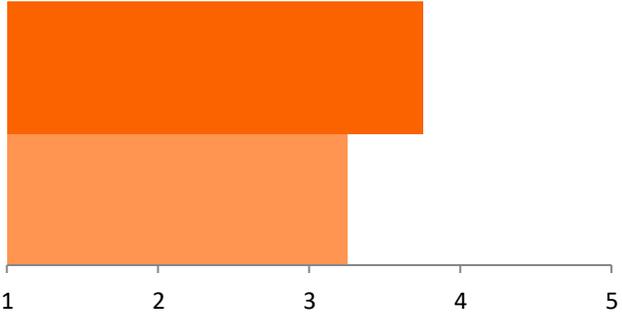
- The region needs a tourism master plan that includes future capital investment and programming
- Tourism is identified as a key economic driver for the region
- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business development
- Tourism industry has a good working relationship with local chambers and/or economic development agencies



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

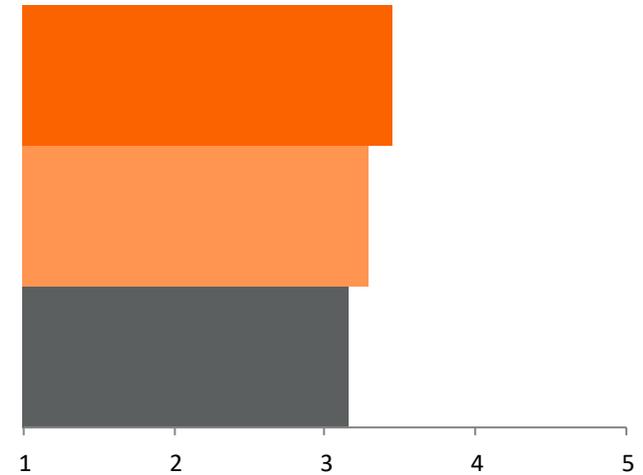
# Regional Cooperation

- 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



# Key Takeaways

- **Currently in Explorers quadrant with below industry average destination strength and community support & engagement**
- **There is good alignment between stakeholder groups on the perception of the destination**



## Destination Opportunities

- **Convention, meeting, and trade show facilities**
- **Headquarter hotel**
- **Public transportation**
- **International tourism readiness**
- **Wi-fi access in public areas**
- **Lack of iconic attractions**



## Community Support & Engagement Opportunities

- **Industry support**
- **Funding support**
- **Workforce**
  - H2B visa restrictions
  - Rents and home prices
- **Community support**
- **Regional collaboration**

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

## **Transportation Infrastructure (39%)**

- **Transit connections from transportation hubs, regional transit connectivity**
- **Offering shuttles around Portland for tourists/visitors to see the city rather than what is only available in walking distance. Shuttles via mini bus and even bicycle shuttles**
- **Better parking in downtown Portland, and a more efficient mass transit. We have many people visit us who have difficulty parking. In addition, we have dealt with tourists on foot (cruise ship, etc.) who would like to visit other parts of the city but have difficulty arranging transportation**

## **Advertising, Marketing, PR & Branding (13%)**

- **More advertising/support of small, unique to Maine businesses, restaurants, and making the Maine Experience easy**
- **Portland is, of course, already a productive visitor destination, so I think any movement towards promoting the Greater Portland region, especially highlighting what surrounding communities have to offer, will be to everyone's advantage**
- **Unified online and print materials designating areas of interest: food, family activities, hikes, in town attractions, etc. This way all options could be linked for more information, and all vendors/guides/businesses could be equally displayed and known**

## **Visitor Amenities & Experiential Product Development (12%)**

- **Support a variety of experiences, both in terms of geography as well as content (beach, food, various outdoor activities, shopping, etc.)**
- **Expansion of the experiential centerpiece beyond the peninsula**
- **A visitor's center that would help link visitor's to destinations, events, and opportunities for transportation and walkability**
- **Holistic approach to planning & economic development - visitor industry has to be placed in context**

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

## **Workforce & Housing Availability (14%)**

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- **Cooperative recruiting efforts, creating a Maine tourism employment brand. Highlighting the opportunity to work in our great state**
- **Live + Work in Maine's investment in attracting people to move to Maine**
- **Highlighting the employment opportunities in a variety of fields, especially in the sectors that are expanding/growing**
- **Find creative ways to encourage/attract seasonal service workers**
- **Affordable housing improvement would enhance ability to attract/retain workers in this industry**

## **Transportation Infrastructure (11%)**

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- **Construction of the transportation system**
- **Create car free zones in downtown Portland**
- **Expanding hubs, transit corridors, and adjacent neighborhoods that are not on the peninsula**
- **Transit connectivity**
- **Provide low cost trams for cruise ship passengers into the Old Port**
- **Connecting the towns inland and coastal**

## **Conventions, Meetings & Group Travel (10%)**

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- **More efficient use of the Cruise Ship inflow**
- **New convention center serving Southern Maine**
- **Develop a regional convention center to support all lodging properties especially in shoulder seasons**
- **Continuing to attract cruise lines**
- **Conference center development**
- **Add a convention center to attract more group business**

# What are the top tourism issues to address?

## **Transportation Infrastructure (32%)**

- **Alternative modes of transportation to make it easier to get around, park, and play - especially in the City**
- **better air transportation connectivity to major markets**
- **Gateway signage**
- **Somewhat disjointed public transportation network**
- **Regional transportation, incl. buses, bike networks, trails, etc.**
- **Parking cost, availability and consideration of FREE parking lot**

## **Workforce Availability & Housing (19%)**

- **Aging population/lack of young workers makes it difficult to replace workforce/perhaps needed a multi-faceted approach**
- **Lack of qualified staff to support industry**
- **Workforce to engage and take care of the visitors**
- **Workforce and Creative Person Housing and Affordability**
- **Staff pay compared to New England**
- **Labor shortage in peak season**
- **Housing costs for service workers**

## **Economic Dev. Planning & Experiential Product Development (9%)**

- **Saving the unique character of Maine that attracts visitors from development and overuse (for instance, preventing the disappearance of working waterfront)**
- **Keeping the character of the Old Port with unchecked development all being approved by city planners and council. Its the main reason visitors come to Portland!**
- **Not destroying the area people want to see, like natural environments, small towns ,nice neighborhoods**
- **Balancing residents' needs and tourist economical value**

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

## Culinary & Micro-Breweries/ Agritourism (28%)

- **Culinary (restaurants and specialty food producers i.e.: brewery visits, farms/agritourism)**
- **Farm to table, Trawl to Plate**
- **Food and Wine tours. There is already a winery trail to build upon.**
- **Viewing Portland as a luxury culinary destination**
- **Small food/beverage - local distilleries, breweries, farms, etc.**

## Outdoor Recreation (15%)

- **Waterfront activities**
- **Theme/Adventure tourism**
- **Planned Outdoor activities with guides/teachers**
- **Outdoor/wilderness experience**
- **Expanding the winter tourism (skiing, snow shoe trails, snowmobiling, New England Christmas tourism)**
- **Curated, multi destination adventure travel**
- **Active/athletic tourism: people that come to run a race or do a bike ride event or sailing race**

## Niche Tourism Markets (10%)

- **Spa/resort/high-end luxury market**
- **Retiring boomers**
- **Photography cruises with a guide to help people make their best shots**
- **Lifestyle tourism to attract innovators and entrepreneurs**
- **Volunteer Tourism**
- **Weekend tourism off season/ Portland as a regional weekend escape destination**

# Engagement

Consider that every minute of the day:

- **3.5 million search queries** made on Google (60% on mobile devices)
- **4.1 million videos** viewed on YouTube (consumers prefer video 4:1 over print to learn about product)
- **46,200 images posted** on Instagram (48% of users use platform to help choose vacation destinations)





# 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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