DESTINATION NEXT

Maine Statewide Assessment – Kennebec Valley

June 7, 2018

DestinationNEXT

Vision:

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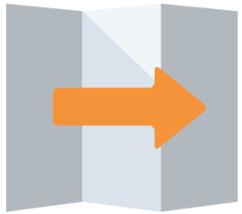
Futures Study

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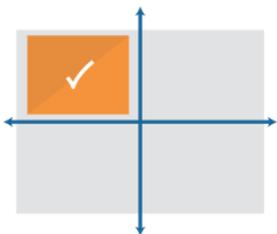
Scenario Model & Assessment Tool

- 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**
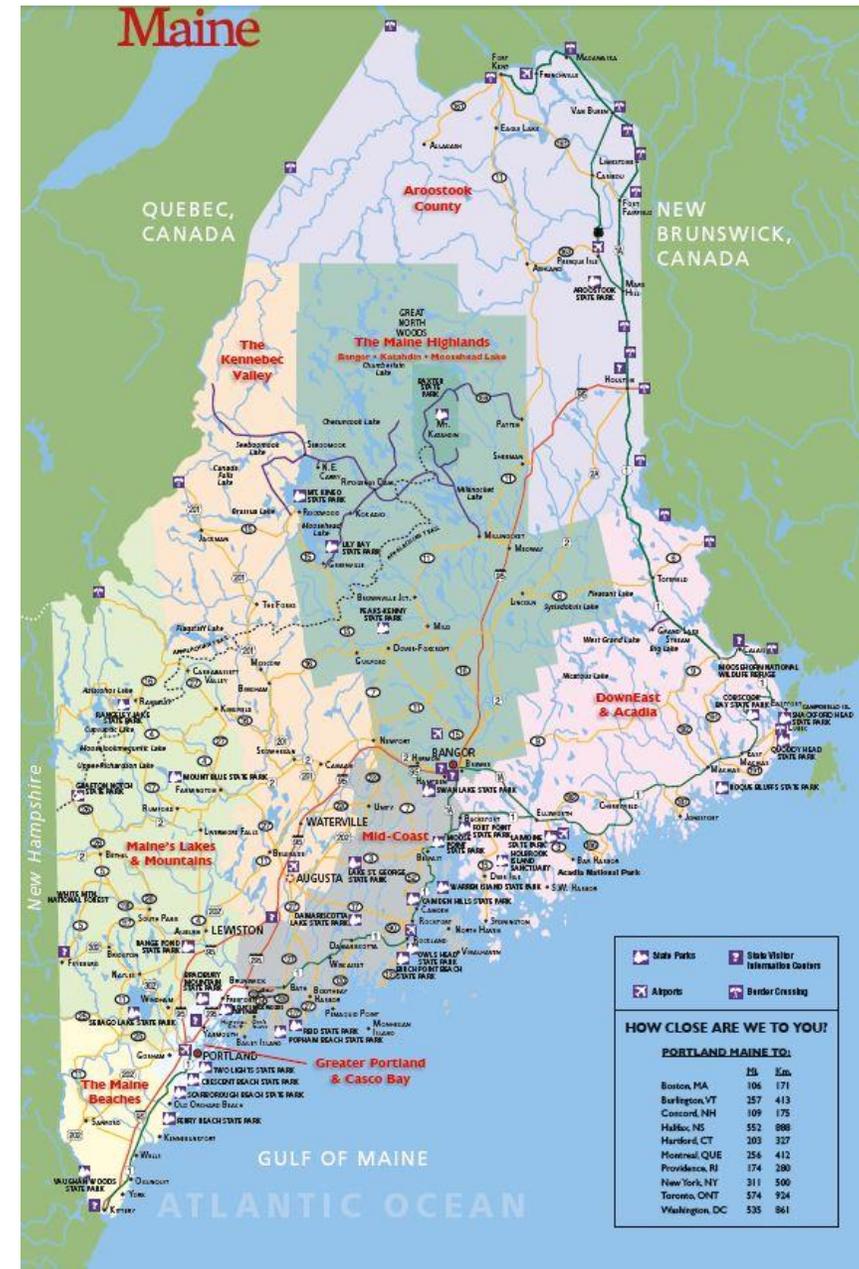
Today's Objectives

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

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 Destination

Established Destination

EXPLORERS

MOUNTAINEERS

Weak Community Engagement
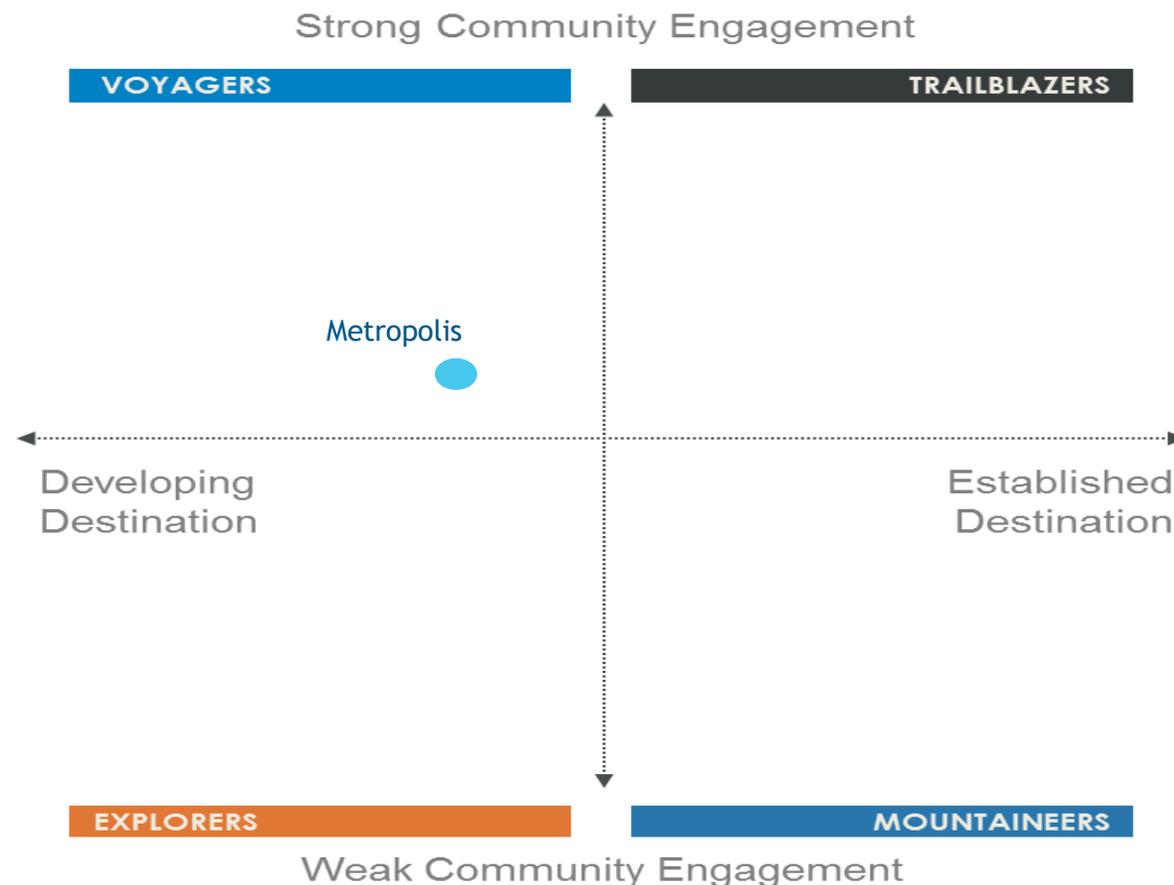
Destination Strength Variables

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

DESTINATION NEXT

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

Regional Assessments

**Northwest Florida
Tourism Coalition**

**South Africa
Convention Bureau**

Global
Results

Scenario Model

DESTINATION NEXT

VOYAGERS
10%

Strong Community Engagement

TRAILBLAZERS
41%

Developing
Destination
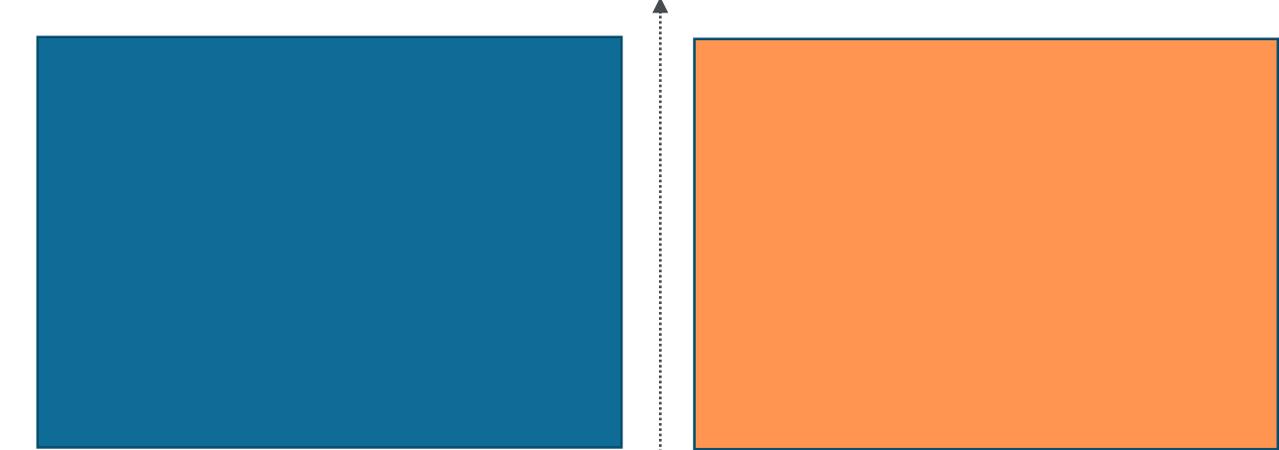
Established
Destination

EXPLORERS
40%

Weak Community Engagement

MOUNTAINEERS
9%

Destination Strength Rankings –
Global Averages

DESTINATION NEXT

Relative Importance

Brand	1st
Destination Performance	2nd
Attractions & Entertainment	3rd
Accommodation	4th

Destination Strength Performance
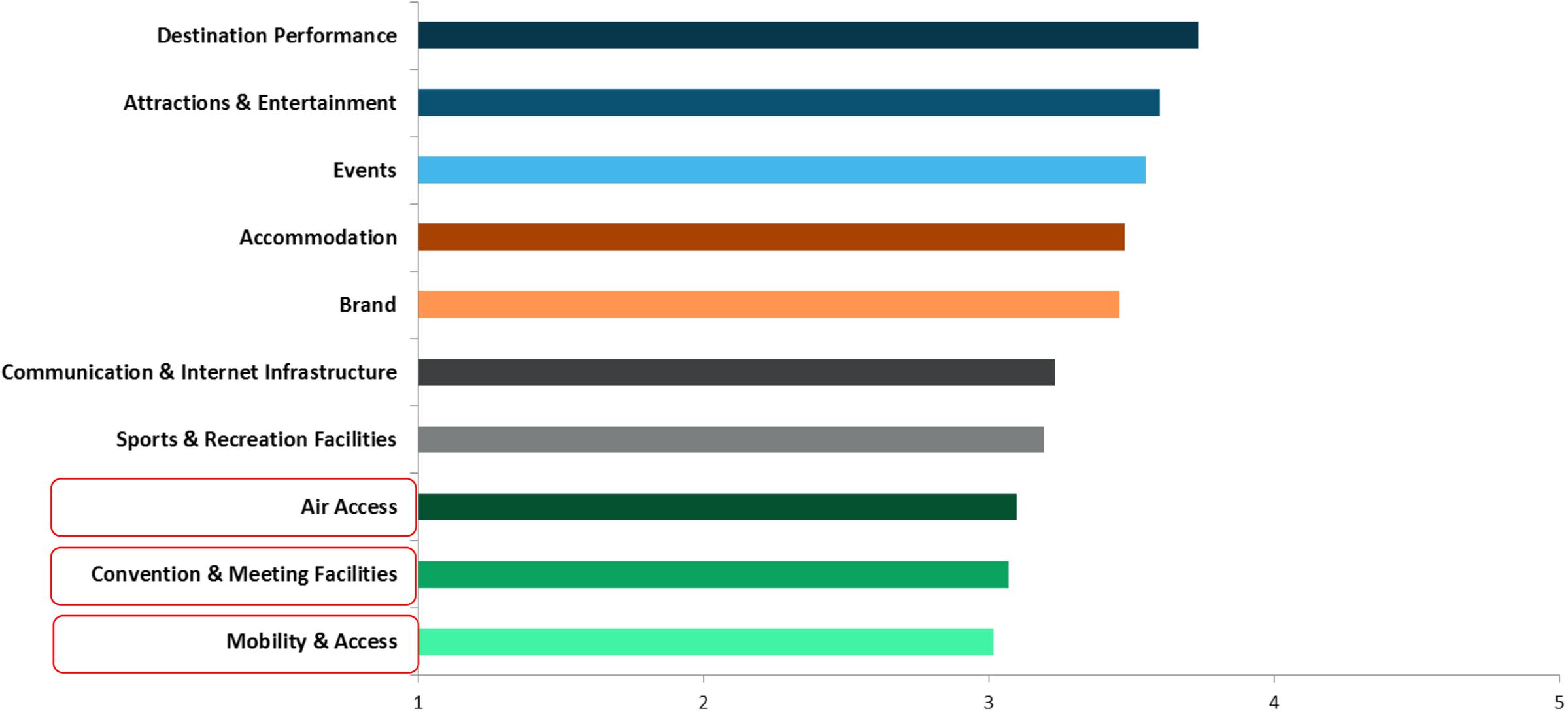
Mobility & Access

- Road infrastructure

- Public transportation

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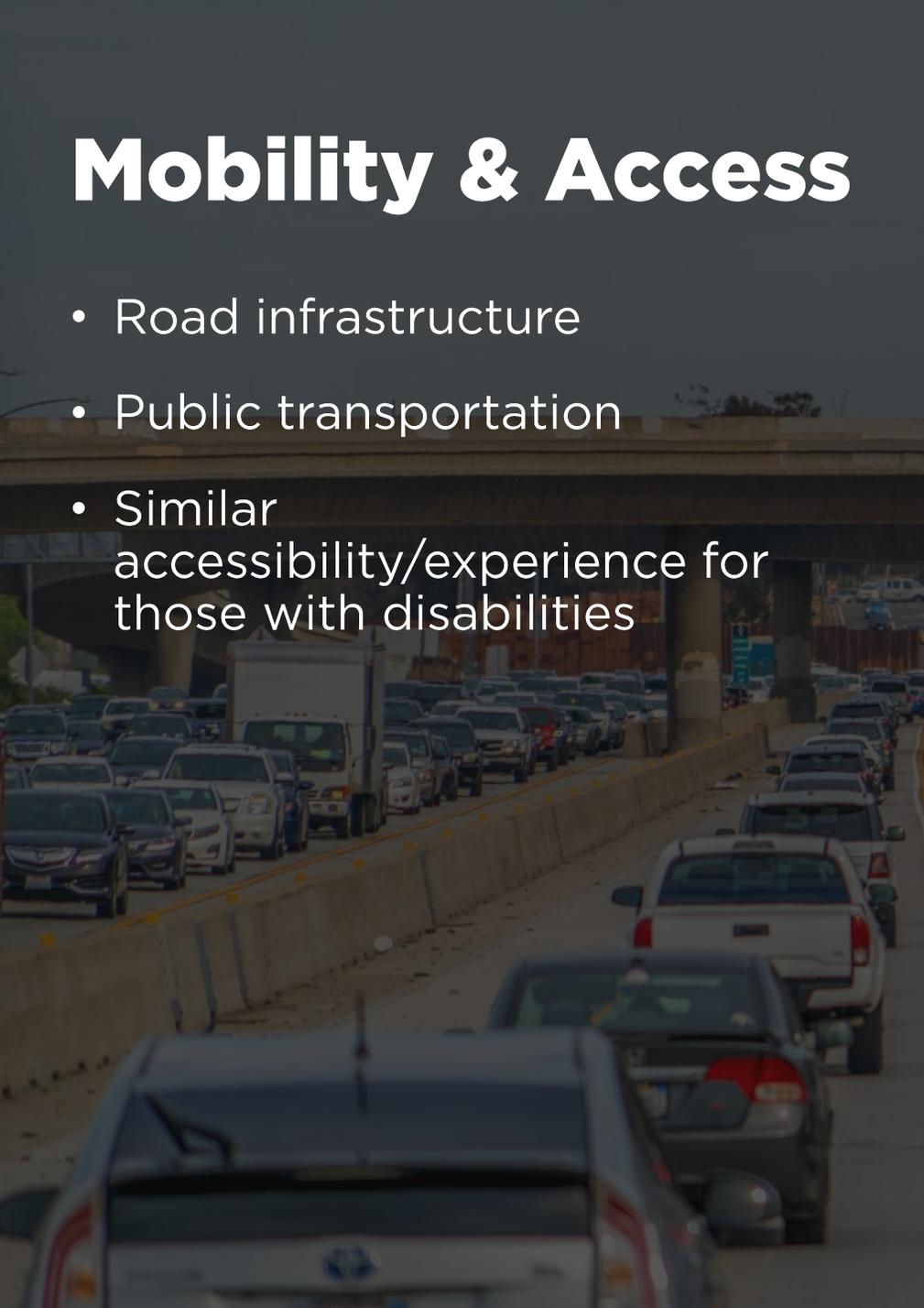
Convention & Meeting Facilities

- 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
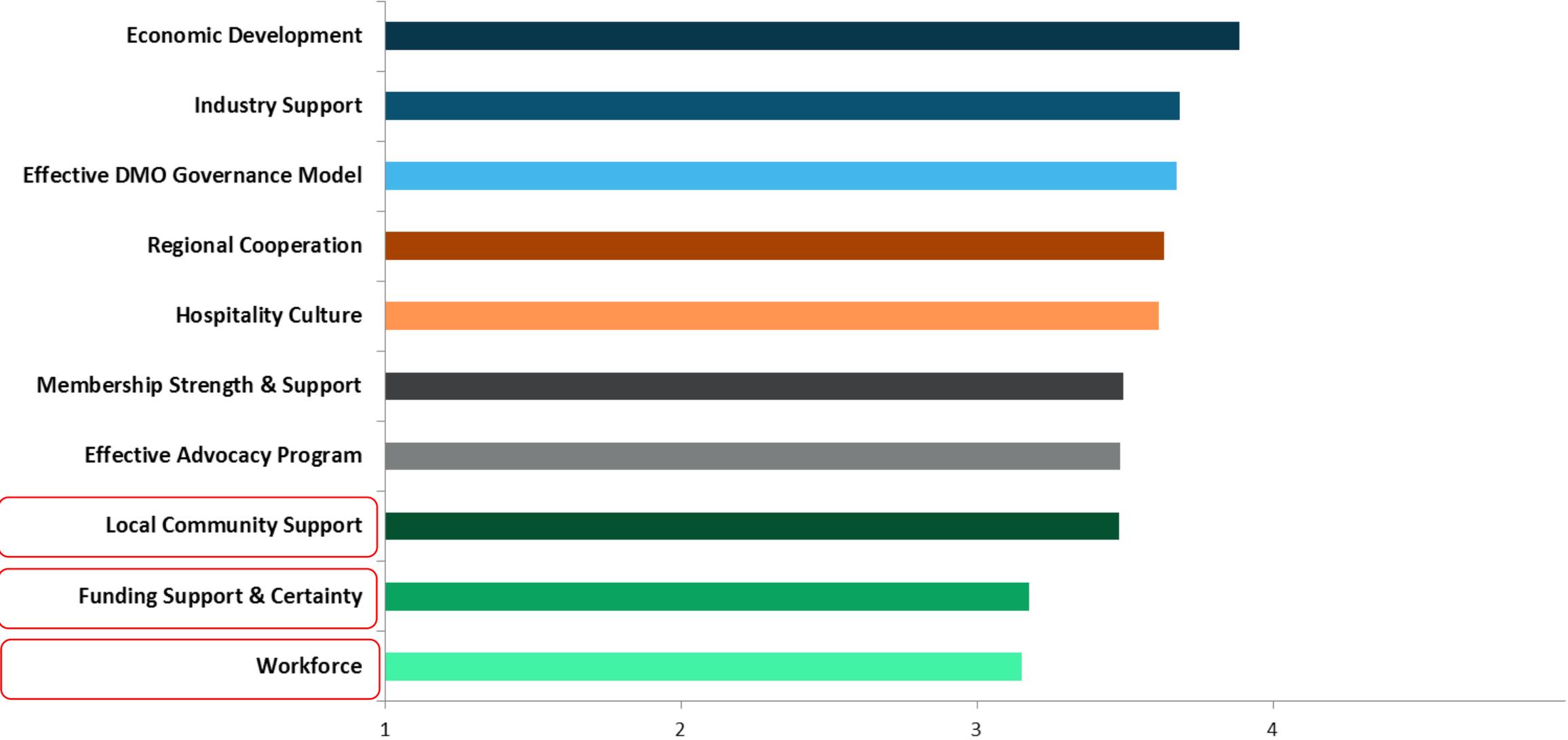
Workforce

- Workforce retention

- Labor relations environment
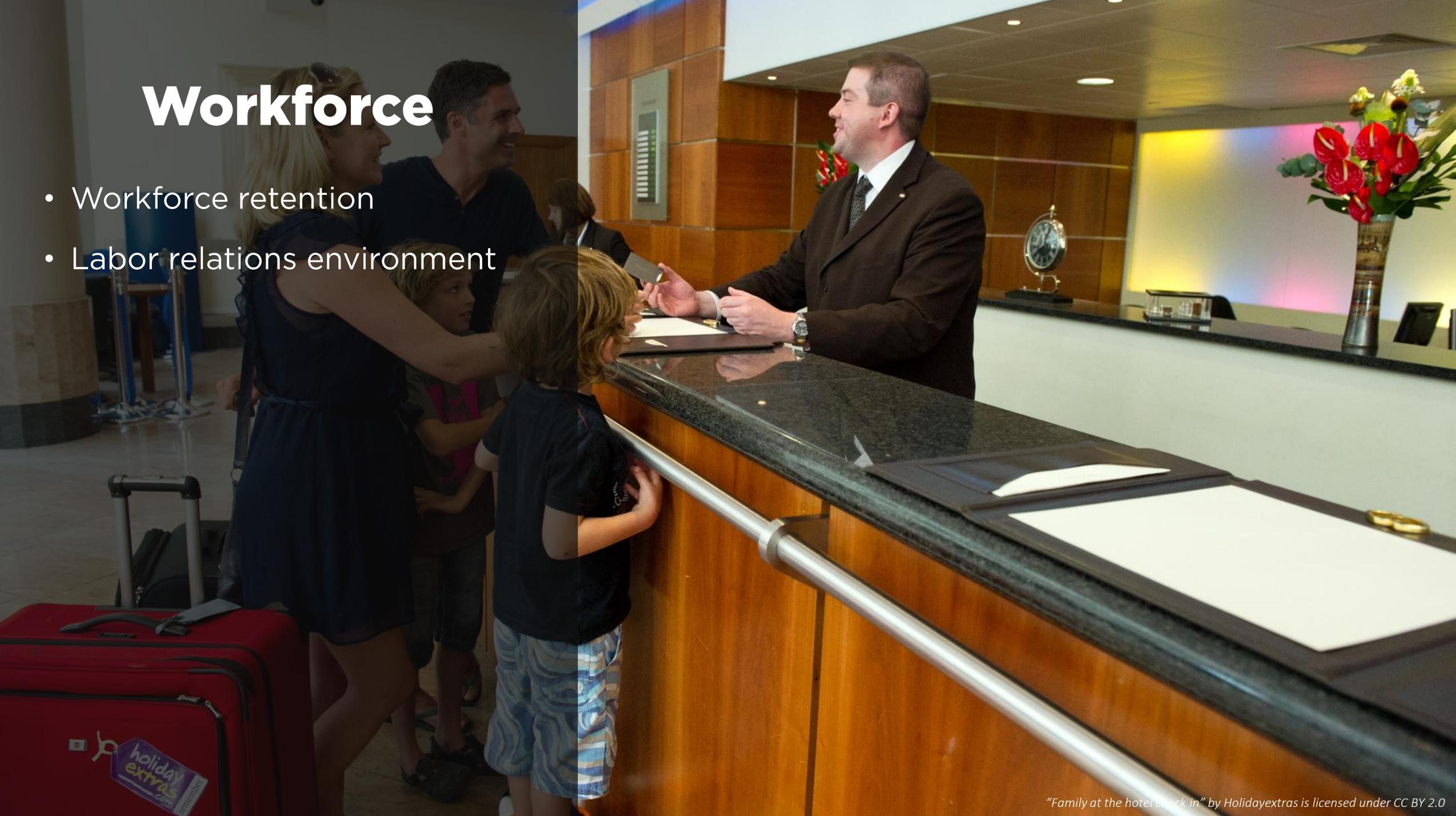
Funding Support & Certainty

- Sufficient revenue sources

Local Community Support

- Support from local residents and media

1,033 Responses - by Region

DESTINATION NEXT

Greater Portland & Casco Bay 27%

Downeast-Acadia 13%

Mid-Coast 13%

Maine Lakes & Mountains 11%

Maine Highlands-Other 9%

Kennebec Valley 8%

Maine Highlands-Bangor 6%

The Maine Beaches 7%

Aroostook 6%
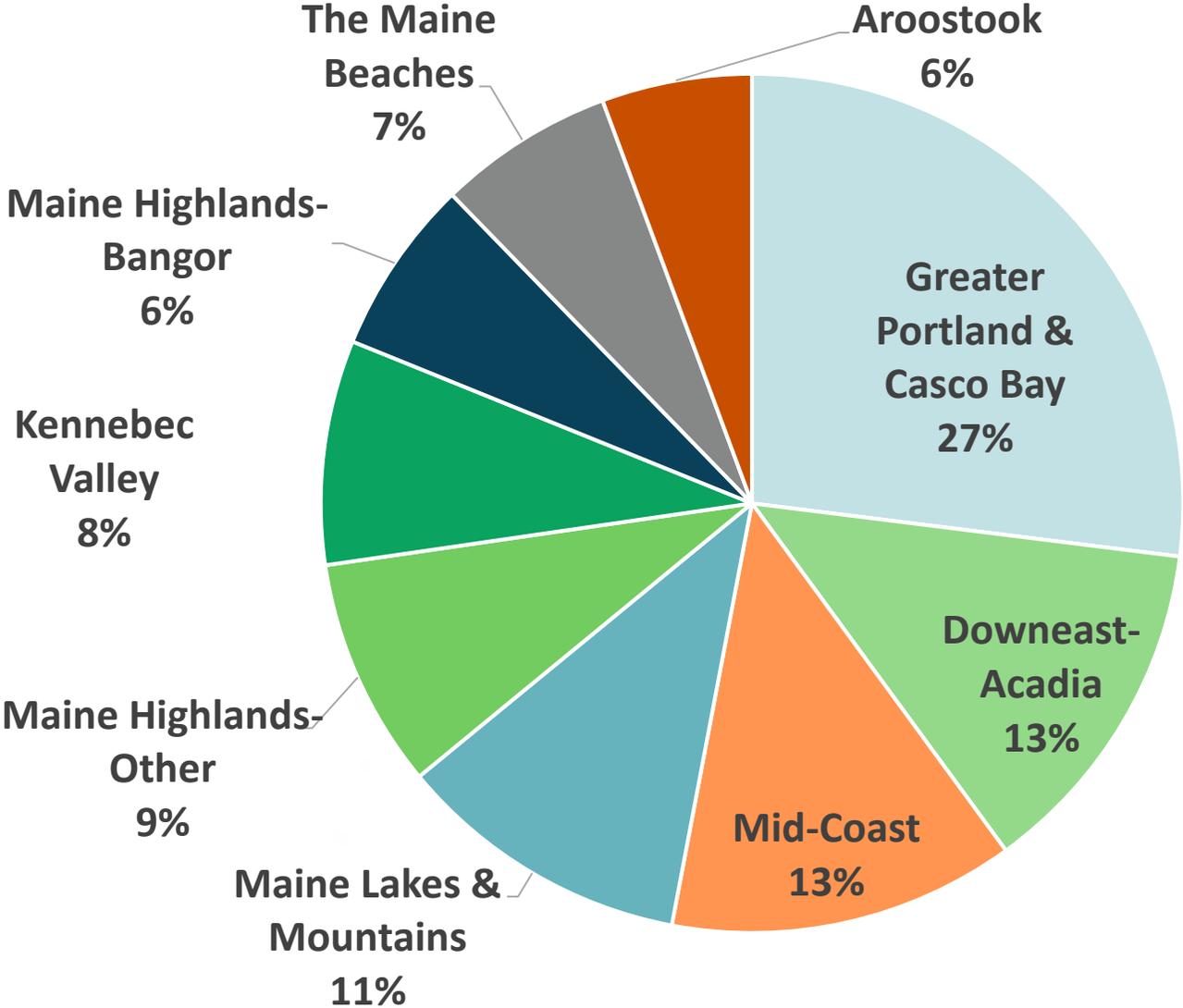
1,033 Responses – By Stakeholder

Attraction
12%

Education
3%

Facility Manager/Operations
2%

Government Leaders, Economic Development, Workforce Development & Other Officials
15%

Lodging
17%

Organizational Management Team
11%

Retail
8%

Service Provider
8%

Culinary
5%

Transportation
2%

Other
17%

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

Maine Average

Established
Destinations

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

Developing
Destinations

Established
Destinations

Maine Average

50 - 64

18 - 34

35 - 49

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
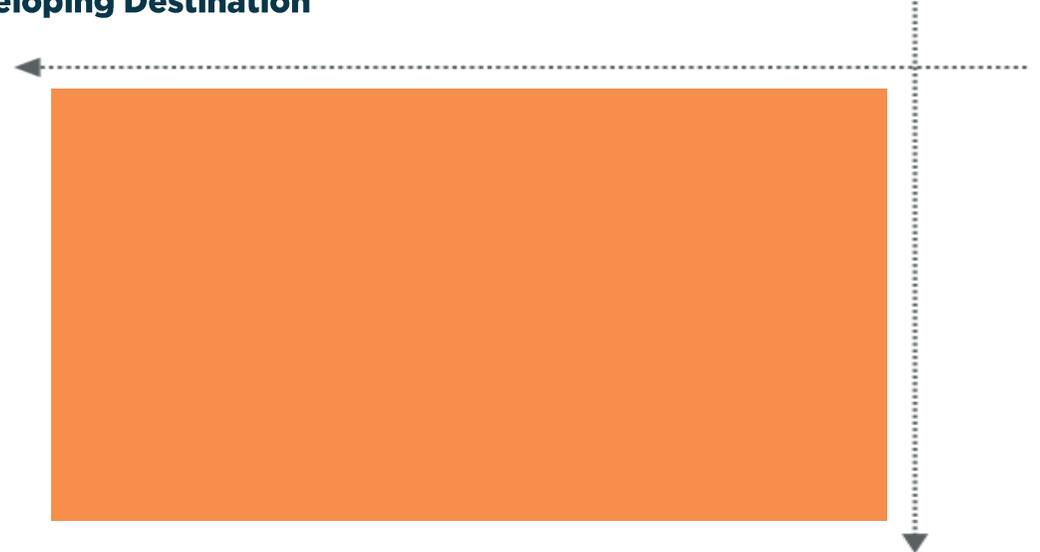
Weak Community Engagement

Becoming a Trailblazer
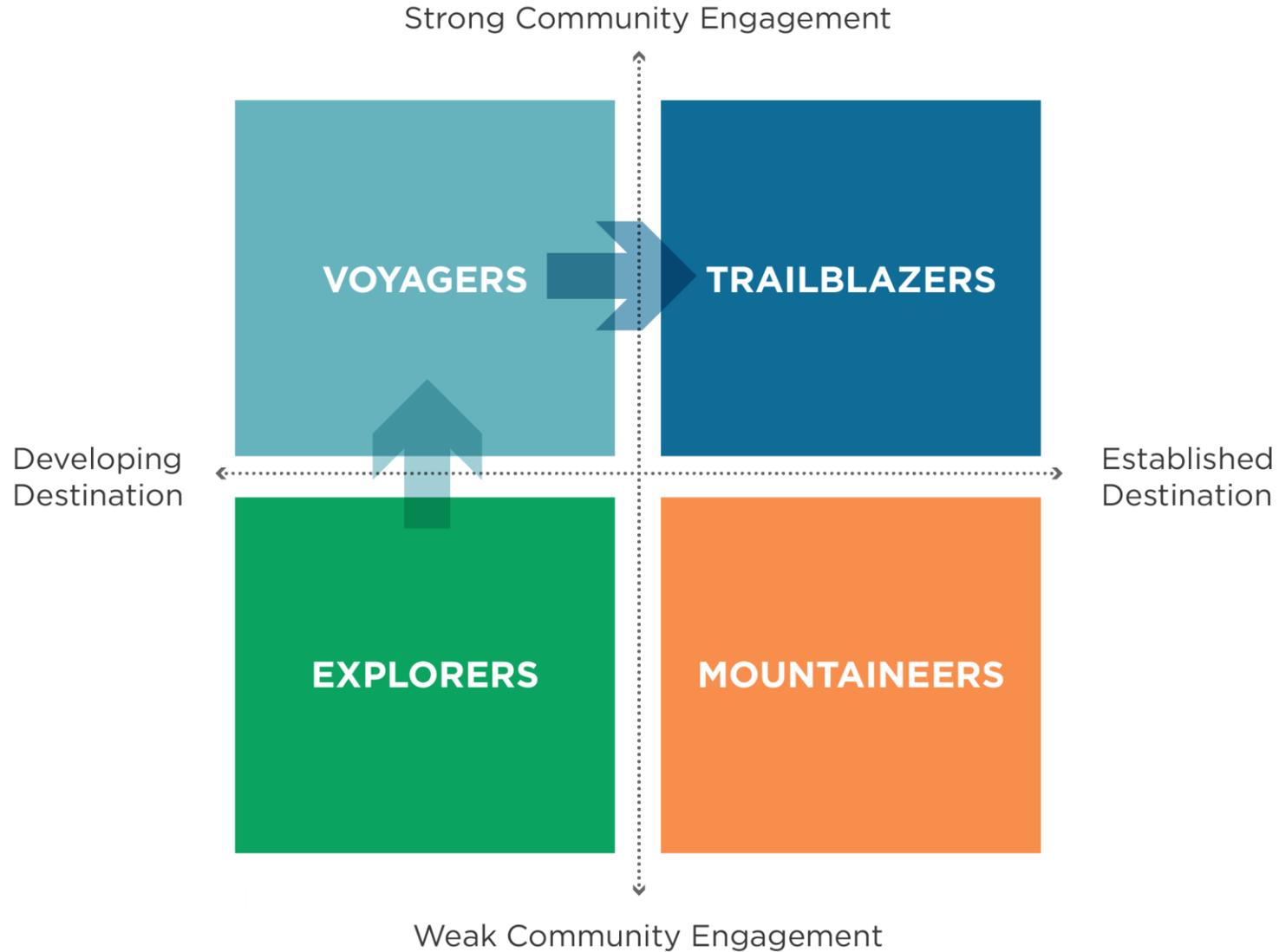
Destination Strength Rankings – State of Maine

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 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	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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Community Support & Engagement – Regional Report Card

DESTINATION NEXT

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	✓	✓					✓		

78 Responses

Pie chart showing response breakdown:
- Attraction 13%
- Education 7%
- Facility Manager/Operations 1%
- Government Leaders, Economic Development, Workforce Development & Other Officials 19%
- Lodging 5%
- Organizational Management Team 14%
- Retail 8%
- Service Provider 10%
- Culinary 10%
- Other 13%

Age Demographic

18 - 34
11%

35 - 49
27%

50 - 64
36%

Over 65
26%

Kennebec Valley Overall Assessment - Industry

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

United States
Average

Developing
Destinations

Maine Average

Established
Destinations

Kennebec Valley
Average

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Kennebec Valley Overall Assessment – Stakeholder Group

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Developing Destinations

Established Destinations

Attraction

Education

Organizational Management Team

Kennebec Valley Average

Other

Government Leaders, Economic Development, Workforce Development & Other Officials

Service Provider

Culinary

Retail

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Kennebec Valley Overall Assessment – Age

Strong Community Engagement

VOYAGERS

TRAILBLAZERS

Developing Destinations

Established Destinations

18 - 34

Over 65

50 - 64

35 - 49

Kennebec Valley Average

EXPLORERS

MOUNTAINEERS

Weak Community Engagement

Destination Strength Rankings – Kennebec Valley

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

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Kennebec Valley Average	Standard Deviation	Industry Average	Kennebec Valley Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.6%	1%	3.11	2.28	0.72
Attractions & Entertainment	10.8%	11.0%	1%	3.65	3.11	0.55
Accommodation	10.5%	10.8%	1%	3.54	2.59	0.64
Mobility & Access	10.1%	10.6%	1%	3.12	2.65	0.56
Destination Performance	10.0%	10.5%	1%	3.88	2.81	0.68
Sports & Recreation Facilities	9.4%	10.2%	1%	3.29	3.22	0.62
Brand	10.5%	9.9%	2%	3.49	3.22	0.53
Communication & Internet Infrastructure	10.1%	9.2%	2%	3.39	2.46	0.80
Events	9.7%	8.4%	2%	3.63	3.31	0.65
Air Access	9.2%	8.0%	2%	3.16	2.80	0.41

DESTINATION STRENGTH - Kennebec Valley	2.83
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

- Has good, unique off-site venues for special events
- Where possible, hotels/other meeting venues take full advantage of the views
- 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
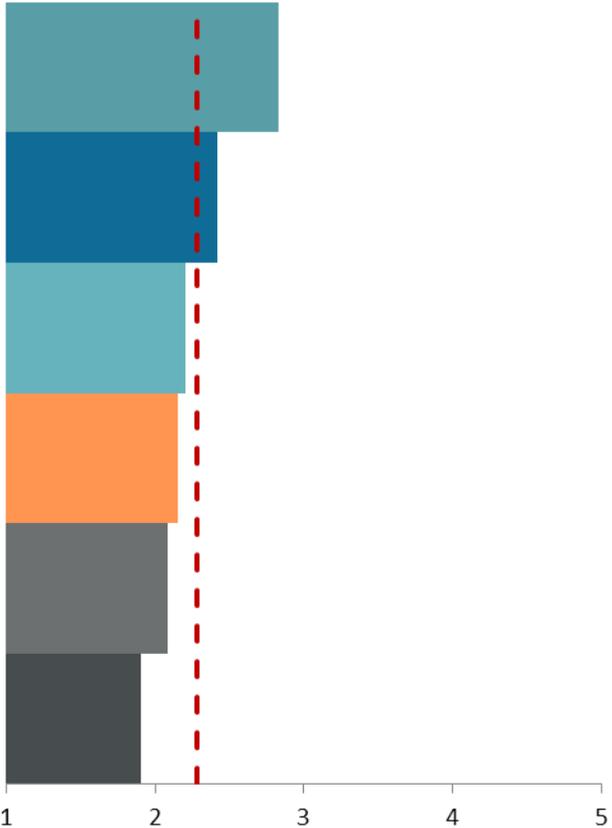
Note
Red Dashed Line signifies the destination average for this individual variable.

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 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

- Has the type of large, famous attractions that cause people to stay (or plan to stay) an extra day
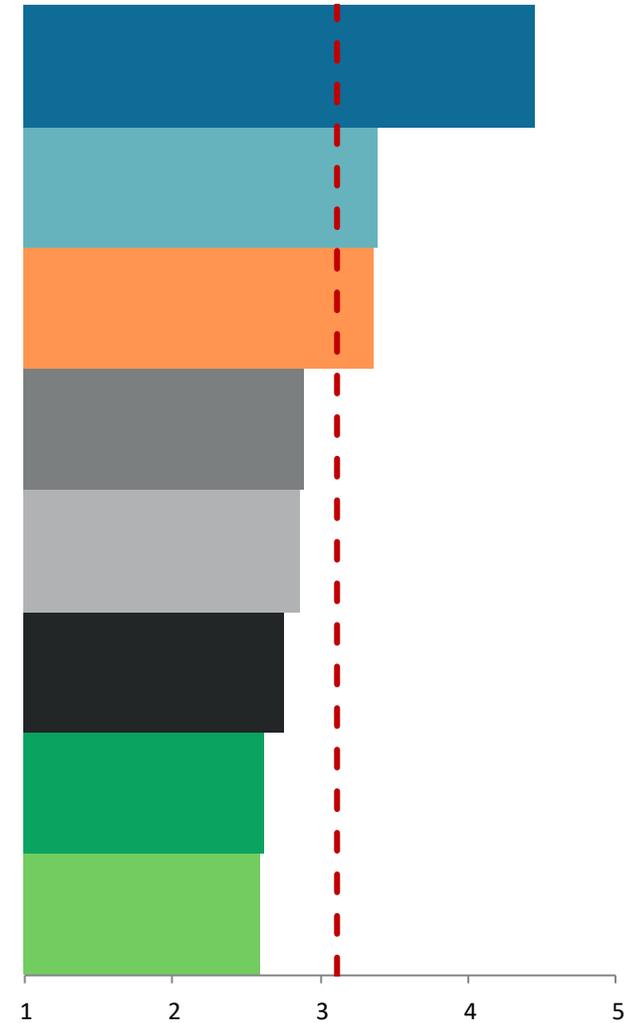
Note
Red Dashed Line signifies the destination average for this individual variable.

Accommodation

■ Offers a diversity of accommodation price options

■ 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)

■ Has a healthy presence of well-known brand name hotels
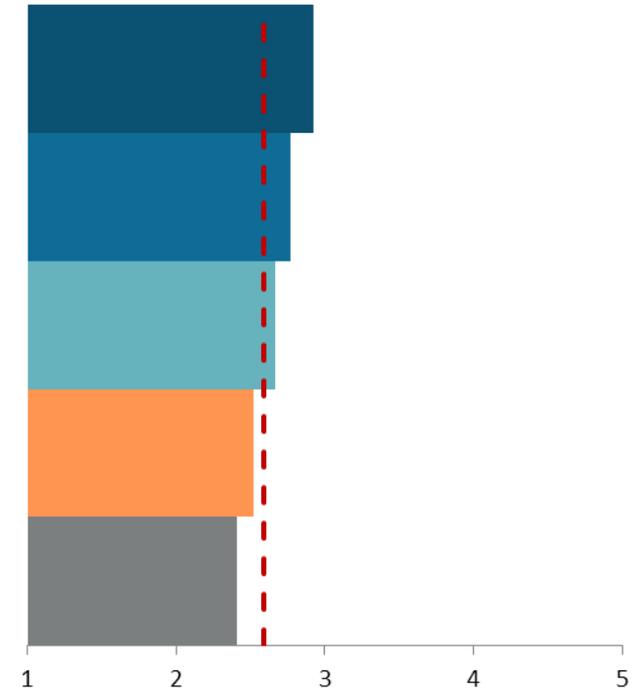
Note
Red Dashed Line signifies the destination average for this individual variable.

Mobility & Access

- **Roads can easily handle residents, businesses and visitor traffic throughout the year**
- **Has adequate water access that makes it easy for visitors to get around**
- **Has great directional signage and highways that make it easy to get around**
- **Provides good access and mobility for those with disabilities**
- **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 public transportation that makes it easy for visitors to get around**
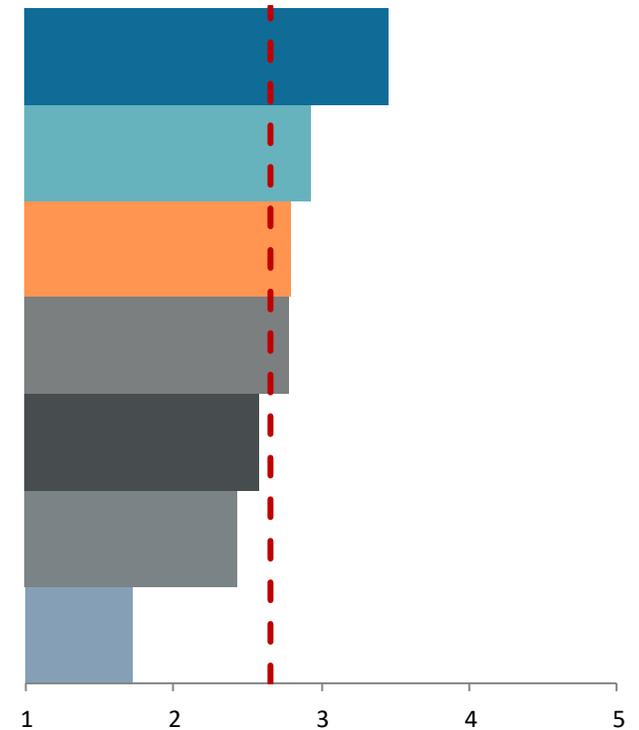
Note
Red Dashed Line signifies the destination average for this individual variable.

Destination Performance

■ Tourism industry performance is adequately measured and tracked

■ Is experiencing a positive growth in overnight visitation

■ The tourism industry does a good job at communicating the performance and economic impact to the public

■ Hotels are performing well (e.g. Occupancy, RevPAR)

■ Is successfully attracting meetings and conventions
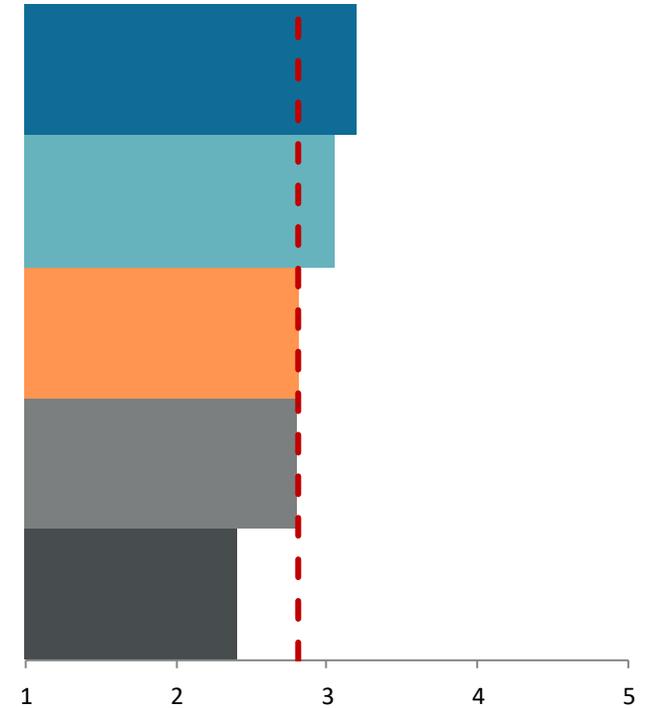
Note
Red Dashed Line signifies the destination average for this individual variable.

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

- 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

- The Maine Sports Commission is a useful resource and is properly utilized throughout the region

- Has the venues to host major professional sporting events
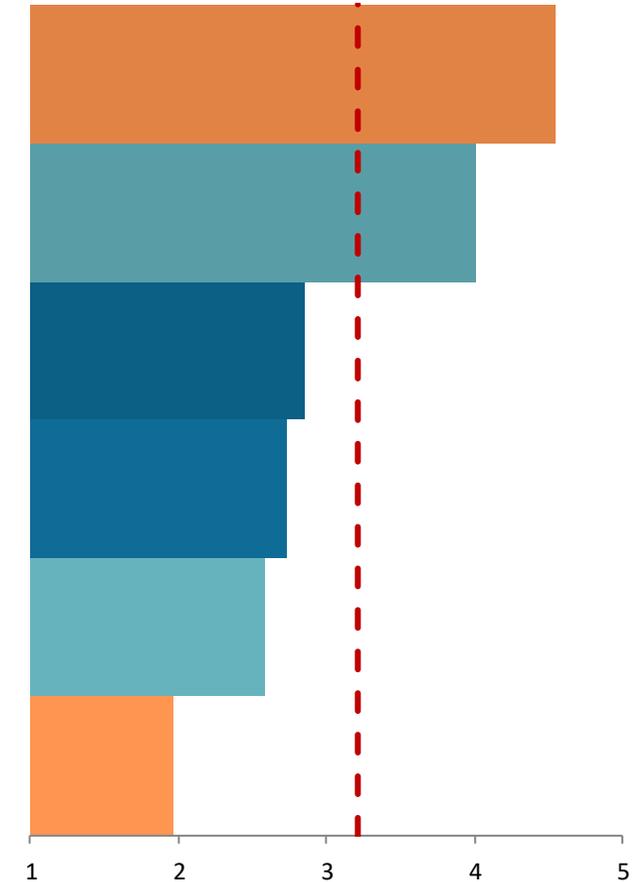
Note
Red Dashed Line signifies the destination average for this individual variable.

Brand

- Is known as being a healthy place for outdoor activities
- Is known for 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
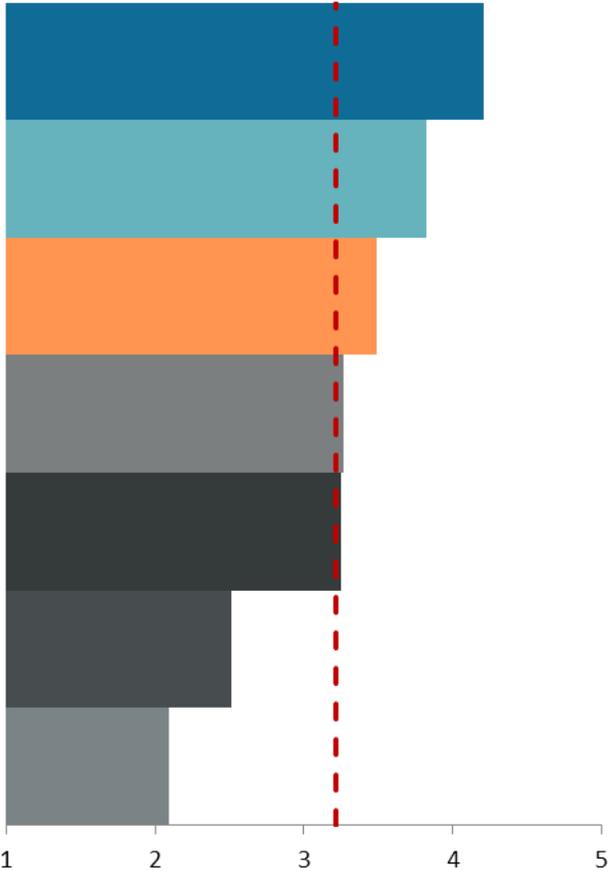
Communication & Internet Infrastructure

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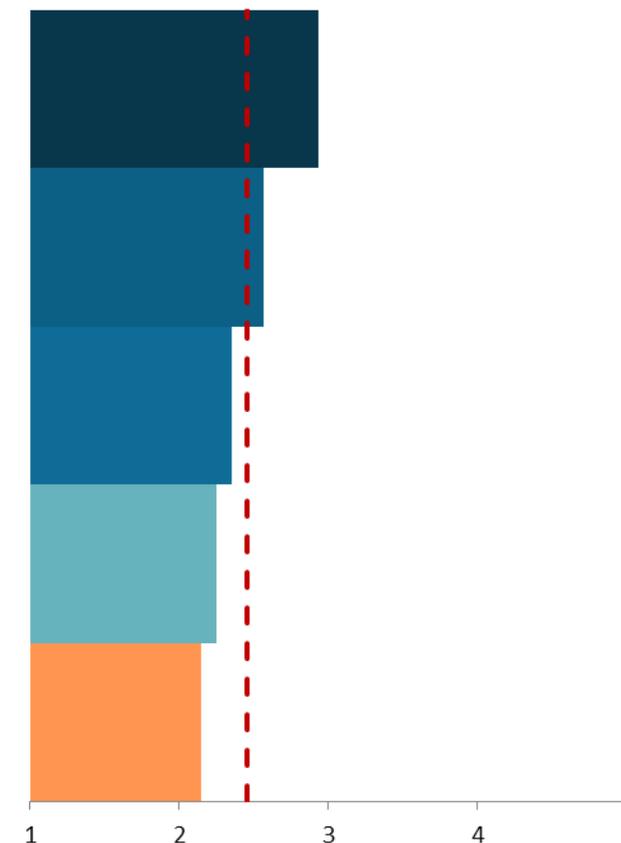
Note
Red Dashed Line signifies the destination average for this individual variable.

Events

- Has an abundance of parks and outdoor spaces for handling special events
- 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
- Offers major events that attract non-local visitors
- Has diverse and quality facilities/venues with capacity/availability to host major events
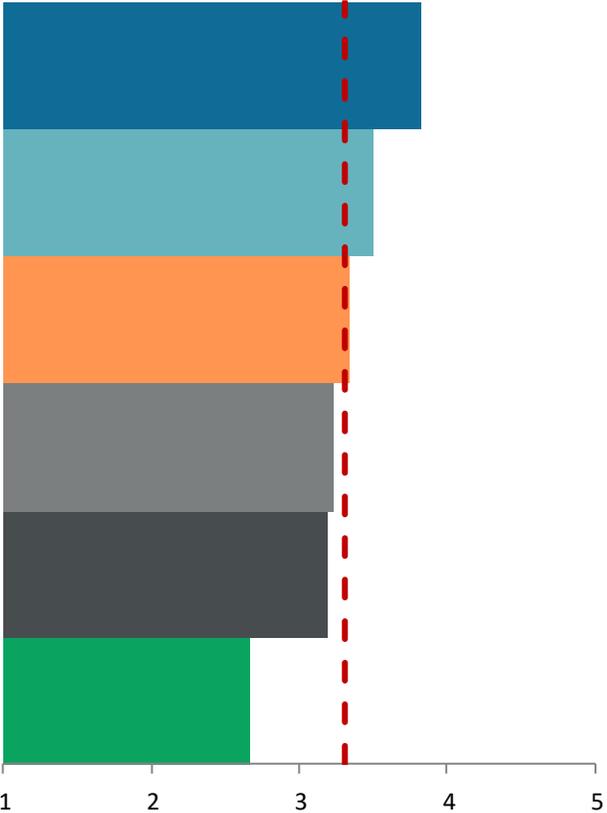
Note
Red Dashed Line signifies the destination average for this individual variable.

Air Access

■ Local airport has the facilities to grow tourism in the region

■ Has adequate domestic air access through airports (number of flights/capacity)

■ Local airport offers a "sense of place" that supports the brand and promotes the region and state

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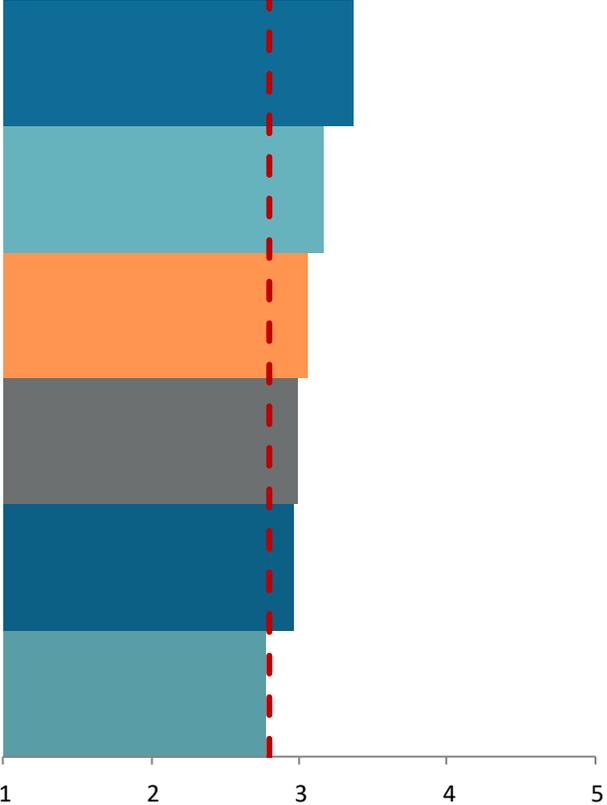
Note
Red Dashed Line signifies the destination average for this individual variable.

Community Support & Engagement – Kennebec Valley

	Relative Importance	Perceived Performance
Industry Support	1st	2nd
Membership Strength & Support	2nd	3rd
Hospitality Culture	3rd	2nd
Regional Cooperation	4th	10th

Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Kennebec Valley Average	Standard Deviation	Industry Average	Kennebec Valley Average	Standard Deviation
Industry Support	9.9%	10.8%	3%	3.81	3.44	0.78
Membership Strength & Support	9.6%	10.3%	3%	3.76	3.43	0.77
Hospitality Culture	10.2%	10.3%	1%	3.71	3.17	1.09
Regional Cooperation	10.0%	10.3%	1%	3.76	3.27	0.98
Local Community Support	10.2%	10.3%	1%	3.56	3.31	0.83
Workforce	10.1%	10.1%	2%	3.31	2.56	0.73
Economic Development	10.2%	9.7%	2%	3.95	4.00	0.59
Effective Advocacy Program	10.2%	9.7%	1%	3.63	3.21	0.85
Effective DMO Governance Model	9.6%	9.3%	2%	3.80	3.31	0.94
Funding Support & Certainty	9.9%	9.2%	2%	3.36	2.43	0.86

COMMUNITY SUPPORT & ENGAGEMENT - Kennebec Valley	3.23
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.

Industry Support

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

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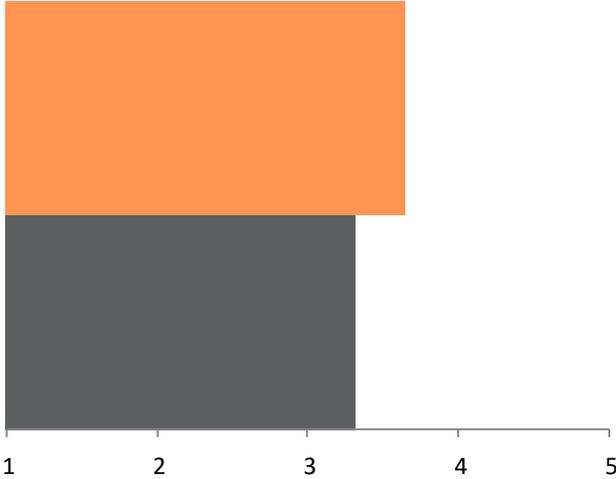
Note
Red Dashed Line signifies the destination average for this individual variable.

Stakeholder Strength & Support

- Stakeholders are active, engaged and supportive of tourism marketing

- Stakeholders find value in region-wide partnerships

- Stakeholders are active, engaged and supportive of tourism development

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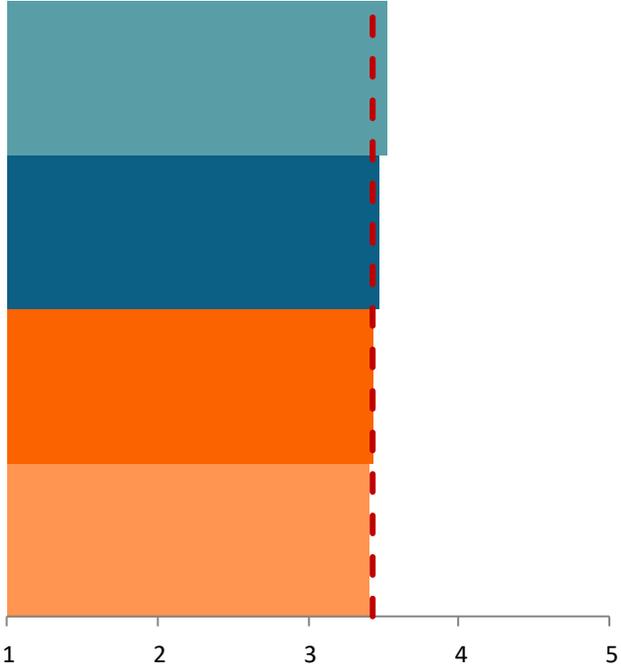
Note
Red Dashed Line signifies the destination average for this individual variable.

Hospitality Culture

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

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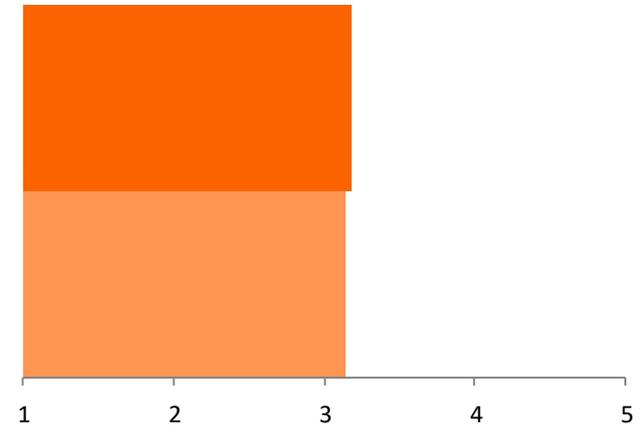
Regional Cooperation

■ Tourism marketing efforts have broad economic benefits across the region

■ There is broad collaboration and coordination among tourism partners in the region
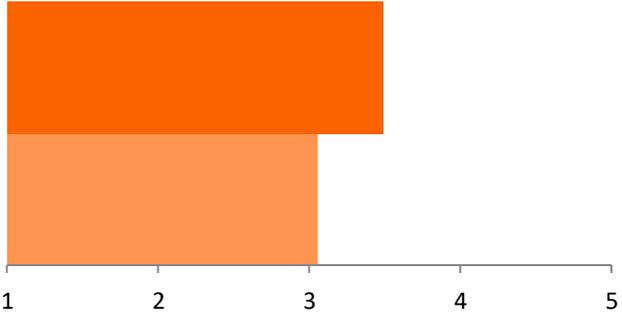
Local Community Support

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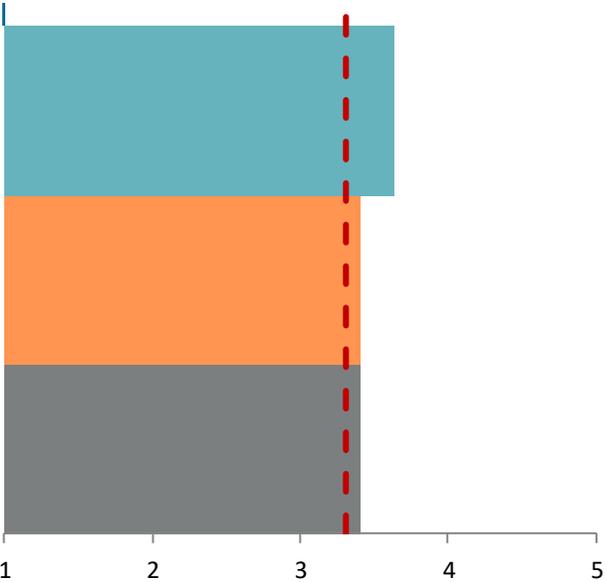
Note
**Red Dashed Line signifies the destination average for this individual variable.**

Workforce

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

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

■ The H2B visa restrictions have not affected businesses that cater to tourists or the hospitality industry workforce

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

■ The region has a strong base of hospitality education programs
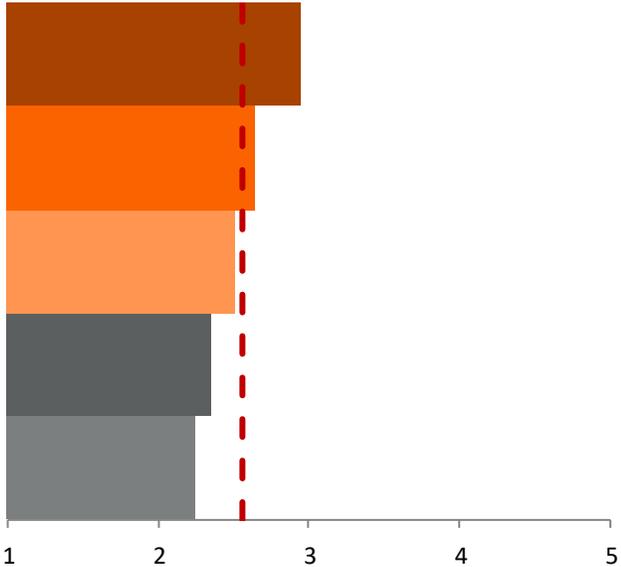
Note
Red Dashed Line signifies the destination average for this individual variable.

Economic Development

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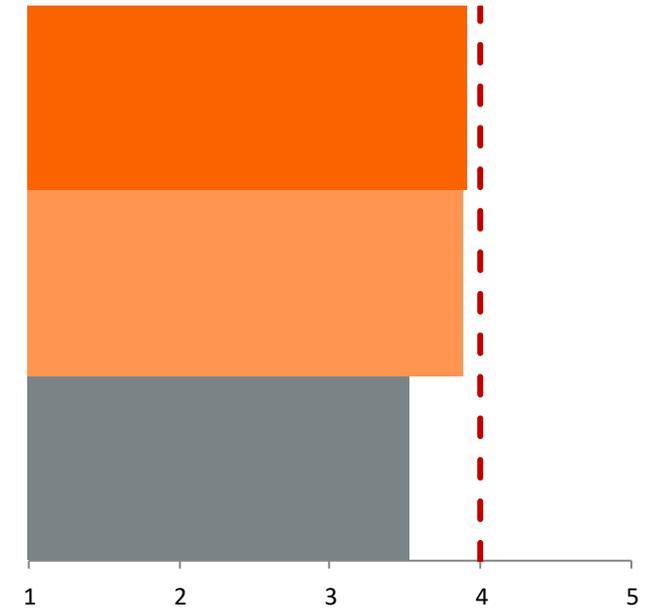
Note
Red Dashed Line signifies the destination average for this individual variable.

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**
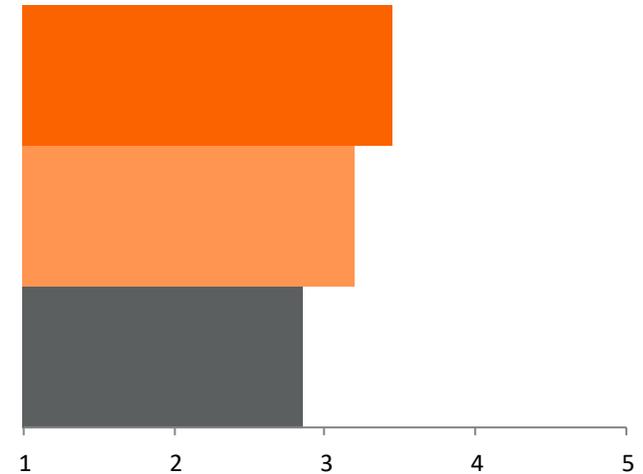
Effective Destination Organization Governance Model

■ Organizations that impact tourism have an effective organizational structure

■ Local leaders are engaged in the governance structure of organizations

1   2   3   4   5
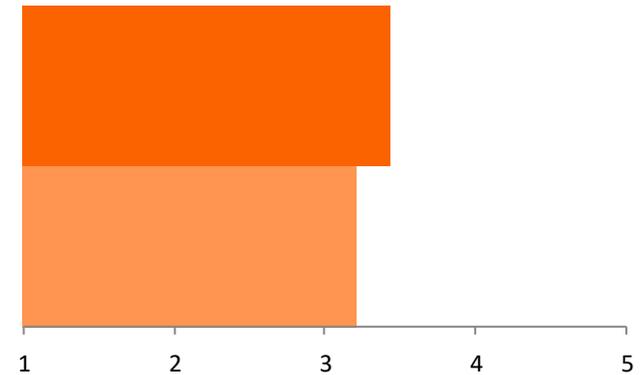
Funding Support & Certainty

■ 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
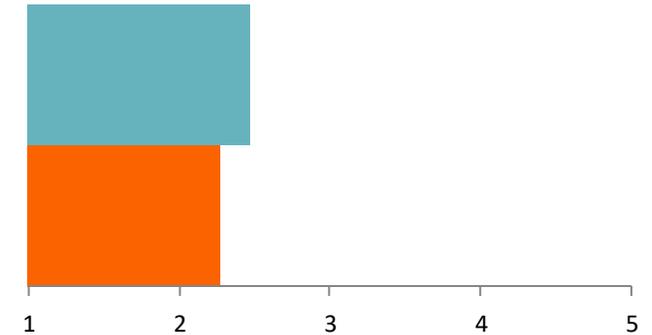
Key Takeaways

- **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

- Iconic attractions
- Unique neighborhoods
- Meeting facilities
- High-quality shopping
- Headquarter & branded hotels
- Public transportation
- Sporting & event venues
- Regional marketing message
- Wi-Fi & mobile phone service

Community Support & Engagement Opportunities

- Workforce
  - Hospitality education
  - High-quality workforce
- Develop local chamber & economic development relationships
- Advocacy
- Funding

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

Advertising, Marketing, PR & Branding (33%)

- Publicity! We no longer wish to be a "best kept secret". We have a thriving arts/culture community and beautiful lakes and woodlands

- More publicity in the form of social media advertising

- Establish and market an attractive brand that utilizes but also differentiates from the overall Maine brand

- Cohesive, robust marketing of the region as a diverse and vibrant arts and culture hub

- Better regional cooperative advertising that includes cultural and outdoor assets, not just the businesses with large advertising budgets

Visitor Amenities & Experiential Product Development (28%)

- Simplifying the process and provide the best, authentic experience

- Offering more authentic food experiences in locations that showcase all our region has to offer (including arts and music)

- Focus on the culture and heritage of the area and develop experiential tourism opportunities related to regional heritage such as mills, logging, hunting, fishing, etc.

- Coordination of communities to offer "trips" from destination to destination, offering visitors opportunities to experience a wide range of activities

- The region working more closely together to create obvious destination options that visitors could put together to make a trip. Currently it's difficult to find a range of complimentary activities that would fill up a stay

Attractions, Events & Entertainment (12%)

- Better retail and nightlife options

- More lake, pond and stream access for boats and swimming. More hiking and biking trails. More to do in the beautiful area we have

- Historical or current features of interest to help people expand their thinking about the type of world we want for our kids

- Cultural and Performing Arts Center and school

- A major recreation attraction such as the proposed white water park in Skowhegan

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

Outdoor Recreation (15%)

- Evaluating emerging recreation opportunities (packrafting... get Beans interested)

- Varied adventure trips (not everyone enjoys fishing)

- River Tourism

- Making progress on Run of River, a proposed whitewater recreation area in Skowhegan

- Outdoor hiking and biking trails

- Increased recreational opportunities on the Kennebec

- Trail connection - Augusta-Brunswick

Branding, Advertising, & Marketing (12%)

- Cohesive marketing of the inland region

- Greater support to organizations that protect the natural resources-who we are and what our brand really is

- Marketing package experiences

- Promote unique outdoor attractions

- Market Maine as live, work and play

- Support Community radio as it reaches many

- National Visibility

- Maine branded activities, products

Food & Beverage (11%)

- Agriculture/farm-to-table

- Quality food and beverage establishments

- Farming, Farm to table and craft brewing

- Position in the craft beverage industry

- Dining and hospitality

- Promote local farmers

What are the top tourism issues to address?

Advertising, Marketing & Promotion (20%)

- Regional awareness/branding

- Promotion/development/embracing of National Monument

- Meeting needs of today's visitors

- Marketing, locally and otherwise

- Integrate online strategies

- Getting people excited about leaving the coast and southern Maine to explore inland and northern areas

- Coordinated communication & marketing

- Competition with more established destinations - coast and mountains

- Attracting families with kids

Transportation Infrastructure & Signage (13%)

- Better Interstate signage

- Wayfinding signage

- Public access to the lakes - promotion of natural resources

- Signage to enable the public to easily find the attractions

- Lack of public transportation

- Traffic flow

Economic Dev. Planning & Experiential Product Development (11%)

- Taking full advantage of the assets a community has but are under utilized/developed

- High quality , consistent delivery of the tourism experience

- Development of a long trail that goes East/West

- Delivery of poor or ill prepared product

- Quality of experience

- Lack of day-trip destinations

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

Culinary & Micro-Breweries/ Agritourism (287

- Agricultural, culinary tourism - farm to table, craft brewery touring

- Agri-tours, river recreation, festivals & cultural events

- Breweries, wineries and distilleries

- Specialty Food/Beverage

- Organic farmers markets

- Farm to table restaurants and markets

- Local Foods

- Agriculture especially marijuana

Outdoor Recreation (26%)

- Winter Activities - snowmobiling, cross country skiing, snow shoeing, etc. The southern New England states haven't been having traditional New England winters and people want their winter fix

- Off road motor sports. Expansion of types of events and activities

- Camping

- Outdoor adventure

- River experiences

- Hiking , service and network supported hiking network

Niche Tourism Markets (11%)

- Support fair trade, not free trade and we may see lumber, maple syrup and blueberry markets explode!

- Film/Media Industry

- Boomers with time to spare out of the traditional visitor season

- Summer campers from other regions of the country/world

- Medical Marijuana

- Wounded warriors

- Youth groups age 10 +

Engagement

DESTINATION NEXT

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)
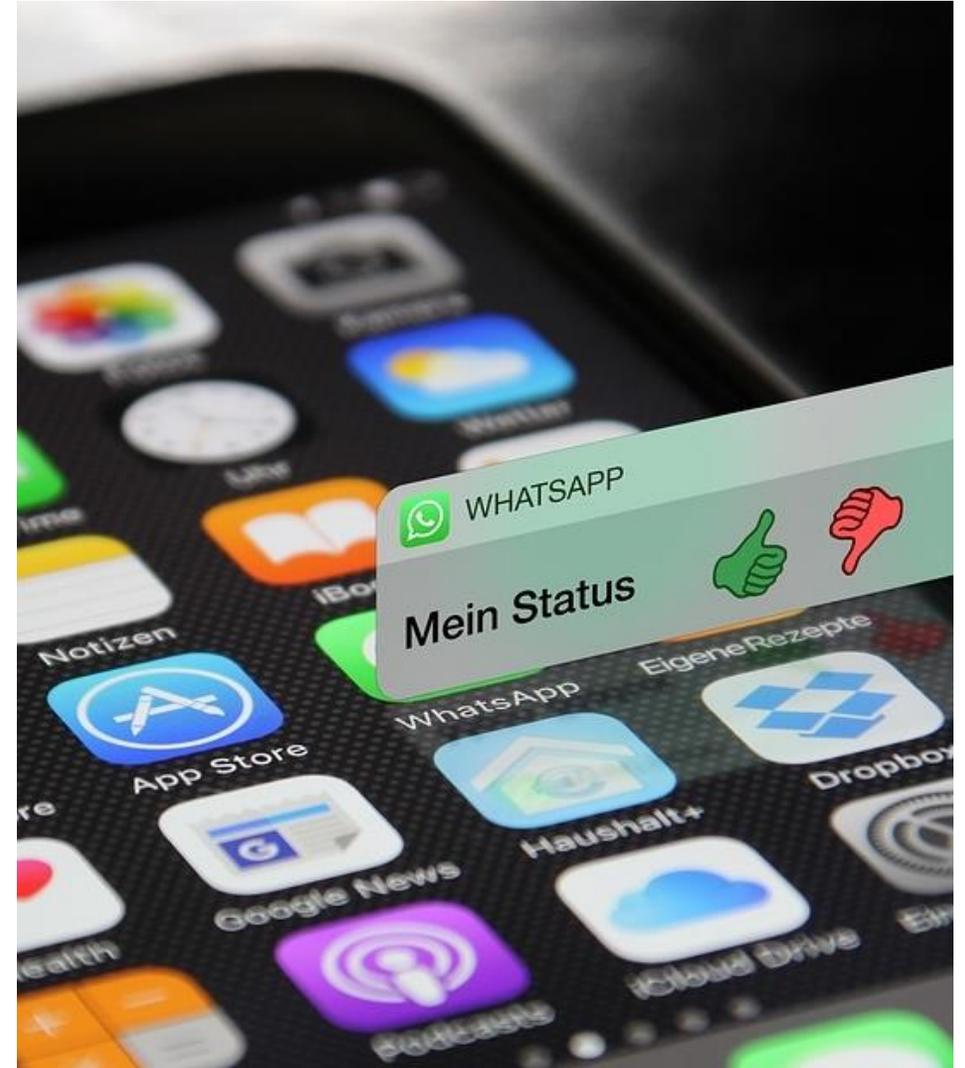
Thank You!

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