

DESTINATION NEXT

Maine Statewide Assessment - Maine Highlands

June 5, 2018

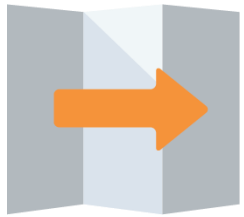


Paul Ouimet

DestinationNEXT

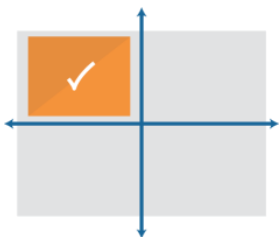
Vision:

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

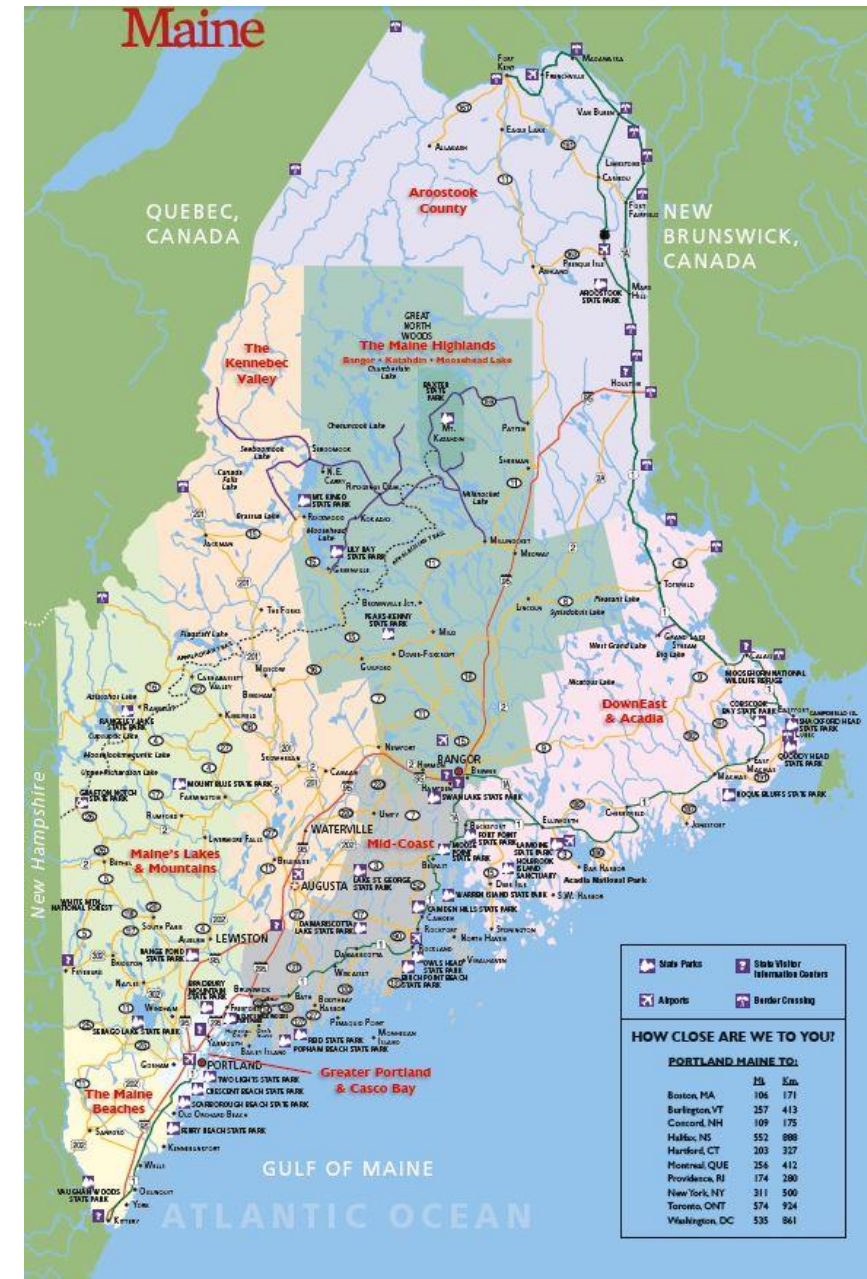
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

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



DESTINATIONS
INTERNATIONAL

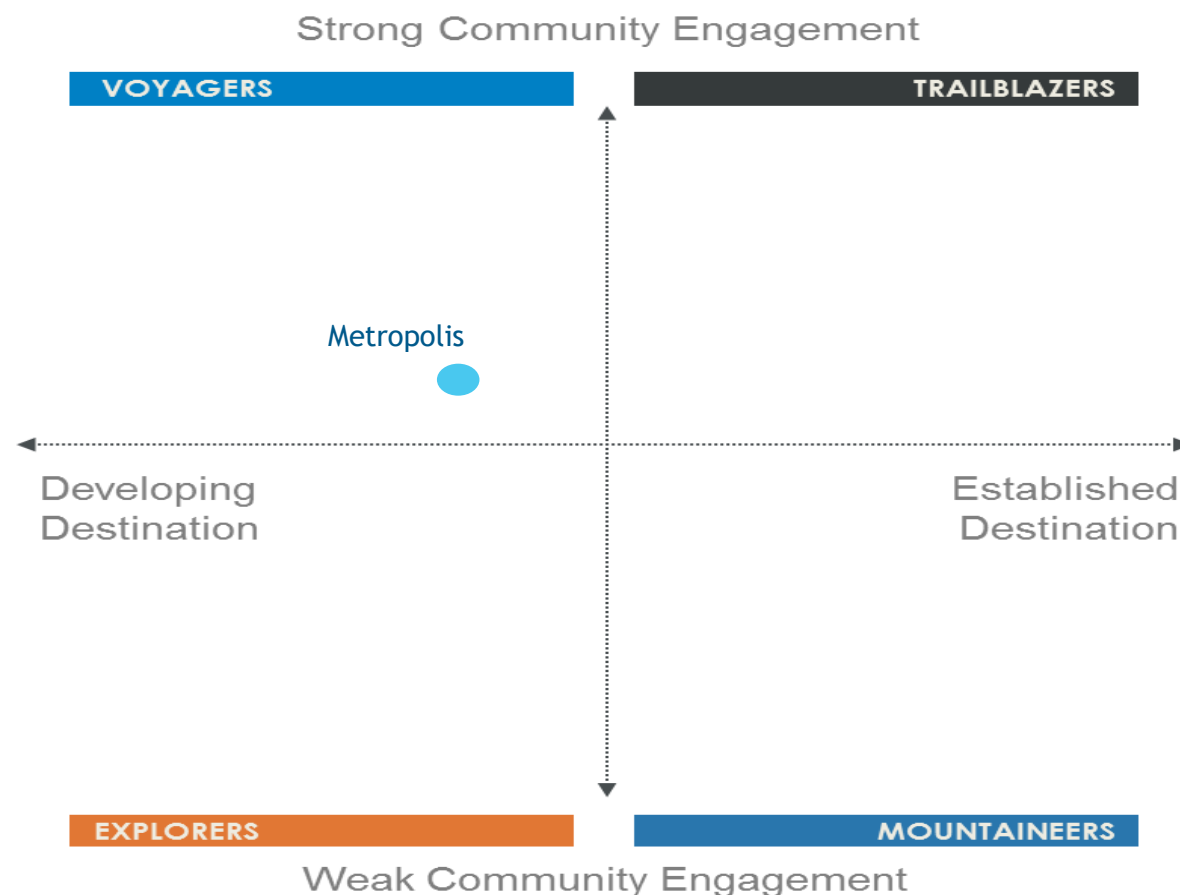
Scenario Model



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**



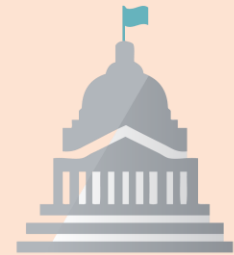
**Membership Strength
& Support**



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

United States



Canada

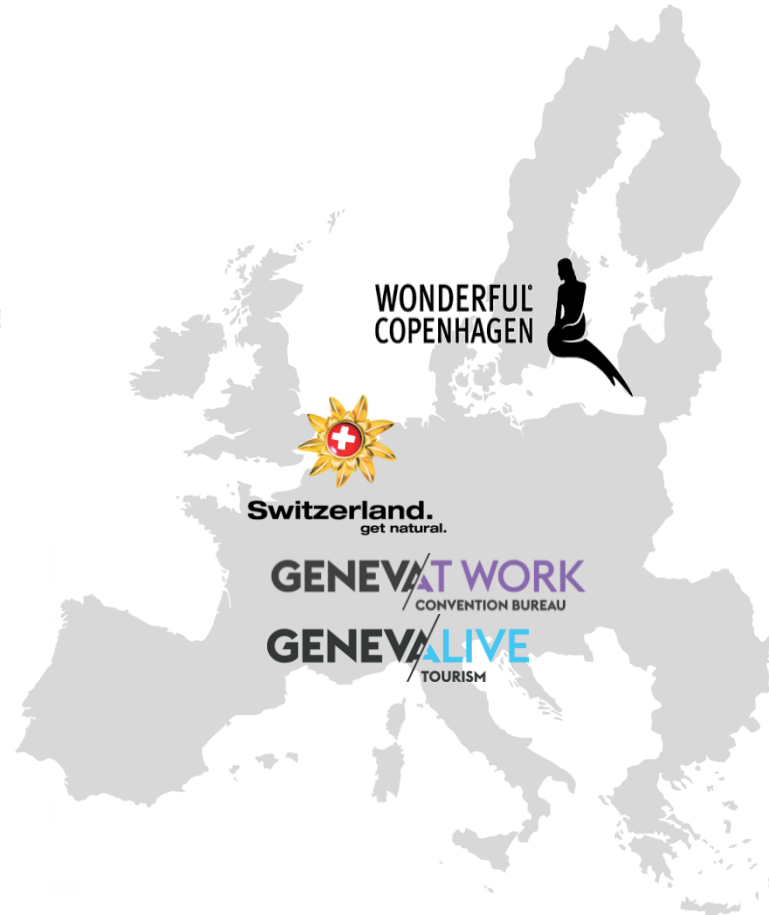
DESTINATION
NEXT



Latin America



Europe



Asia/Australia

DESTINATION
NEXT



Regional Assessments

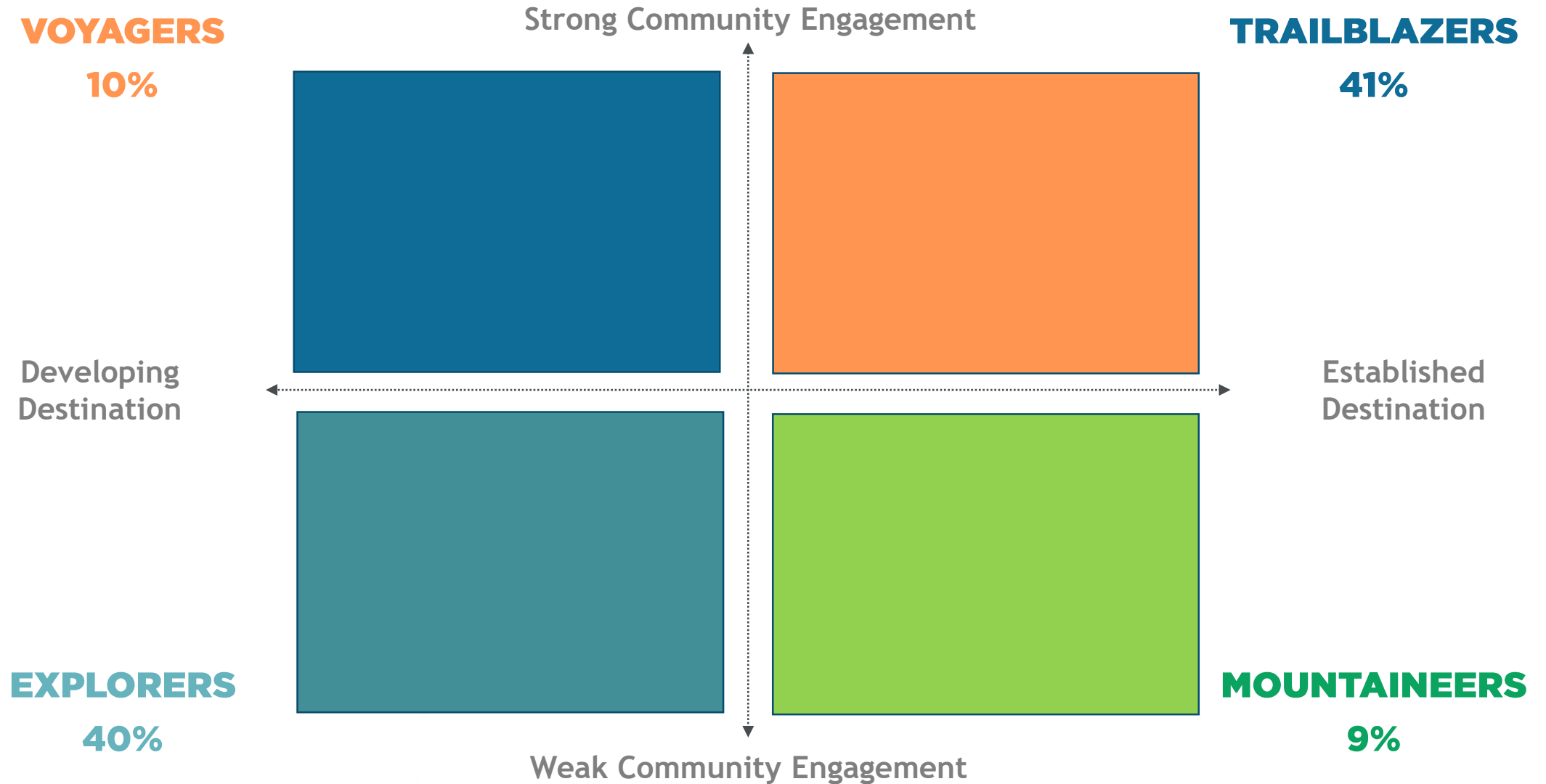


**Northwest Florida
Tourism Coalition**

**South Africa
Convention Bureau**

Global **Results**

Scenario Model



Destination Strength Rankings – Global Averages



Relative Importance



Brand

1st



Destination Performance

2nd



Attractions & Entertainment

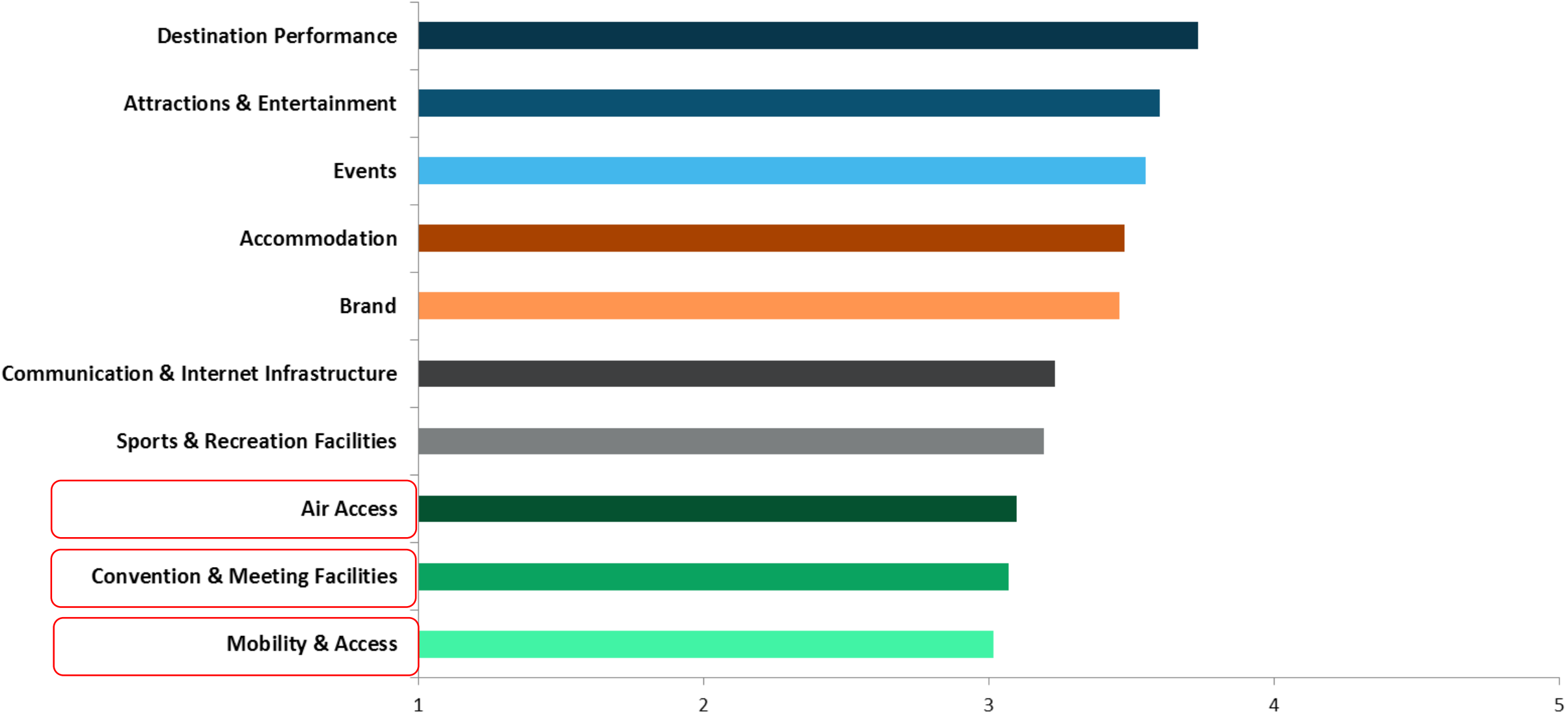
3rd



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)

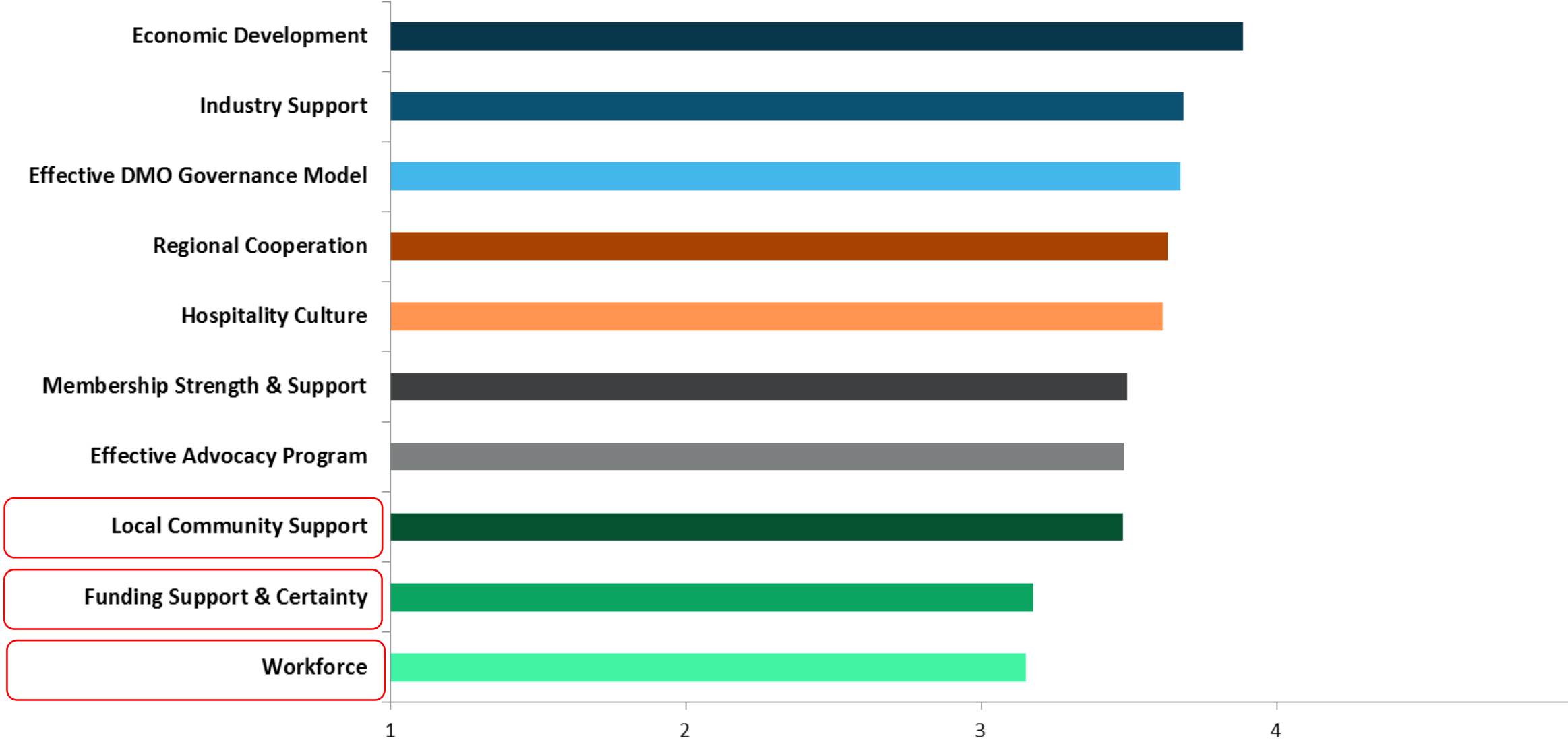


Community Support & Engagement – Global Averages



		Relative Importance
	Funding Support & Certainty	1 st
	Industry Support	2 nd
	Effective Destination Organization Governance Model	3 rd
	Local Community Support	4 th

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



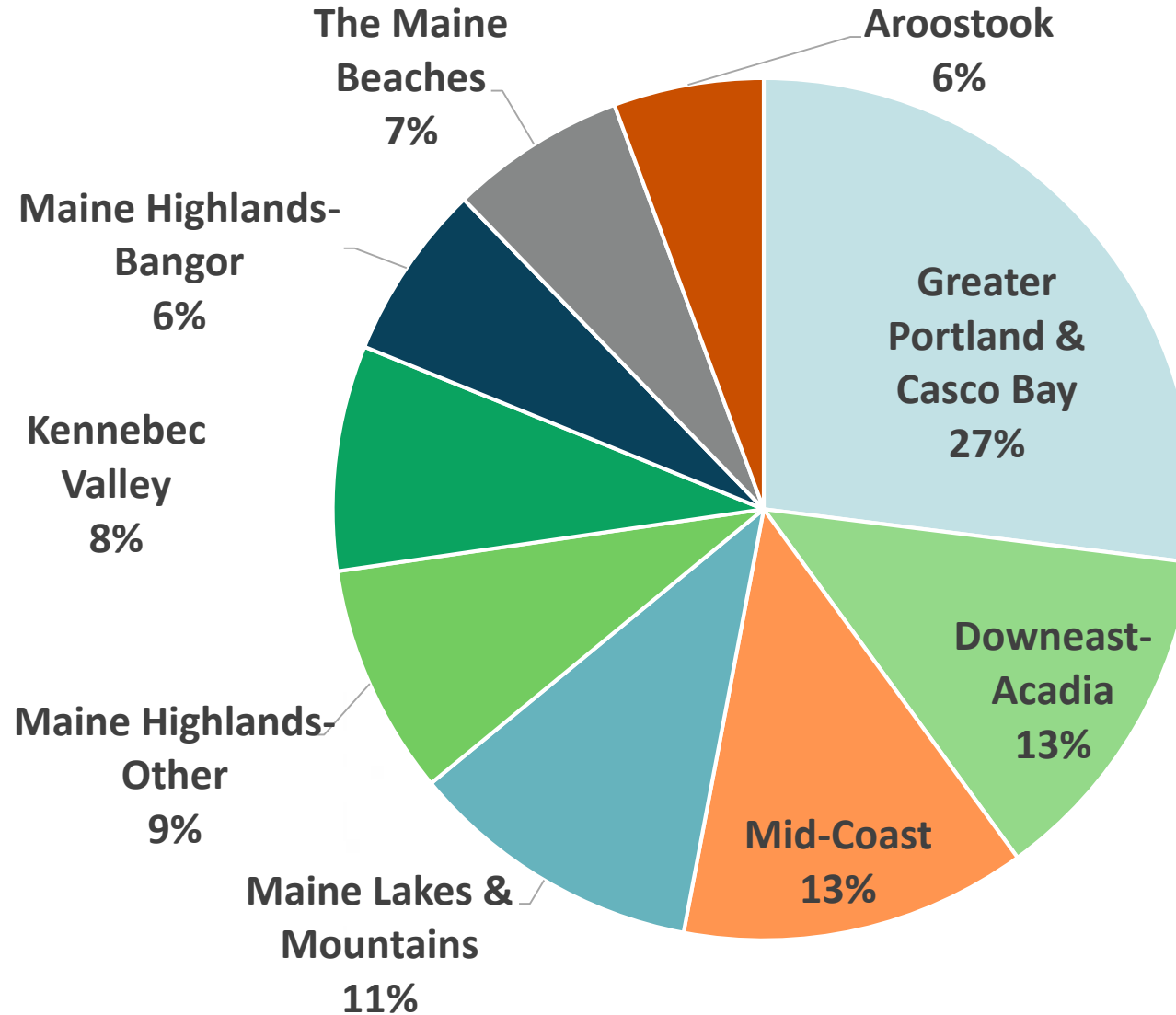
DESTINATION NEXT

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

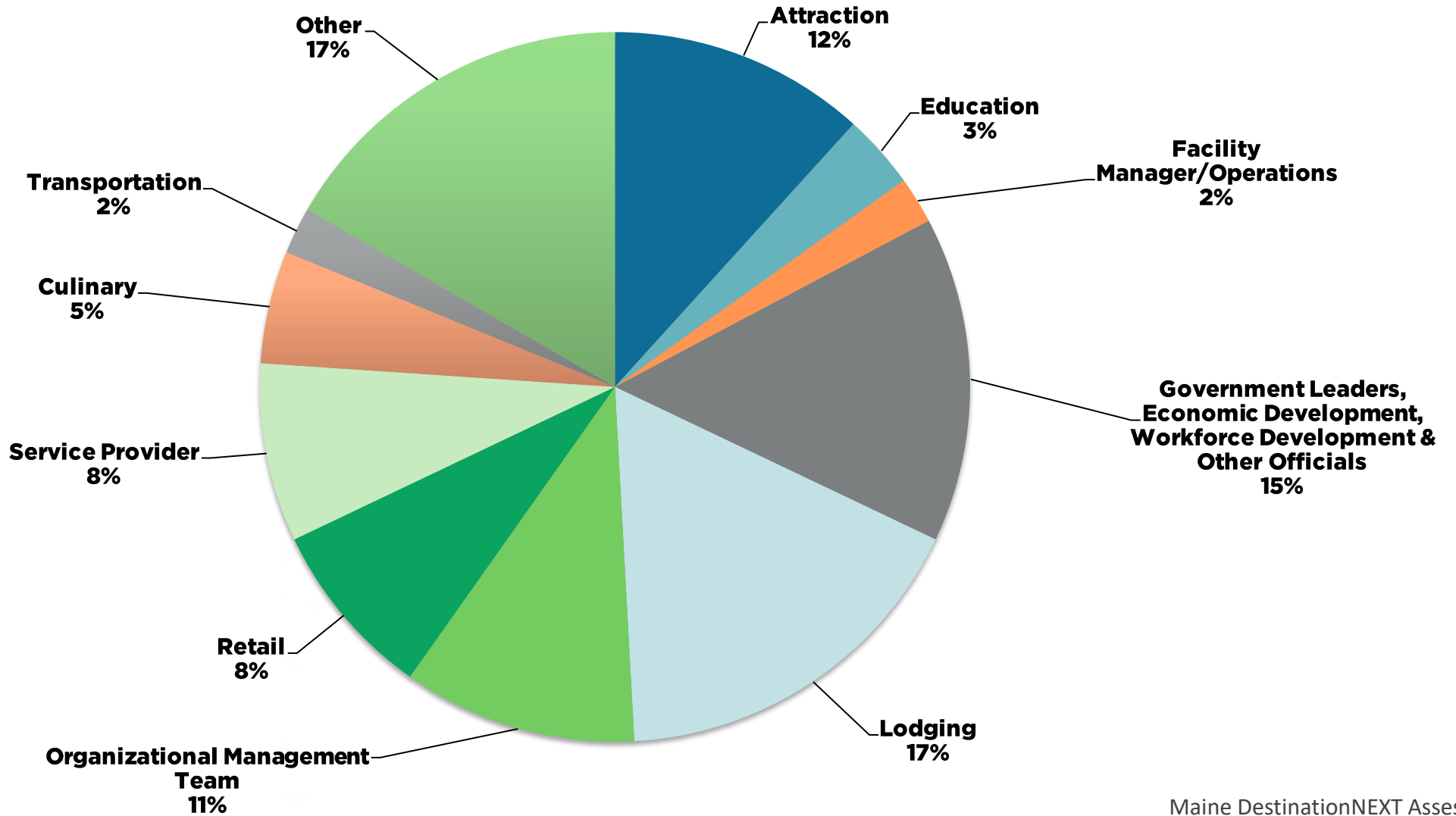
March 29, 2018



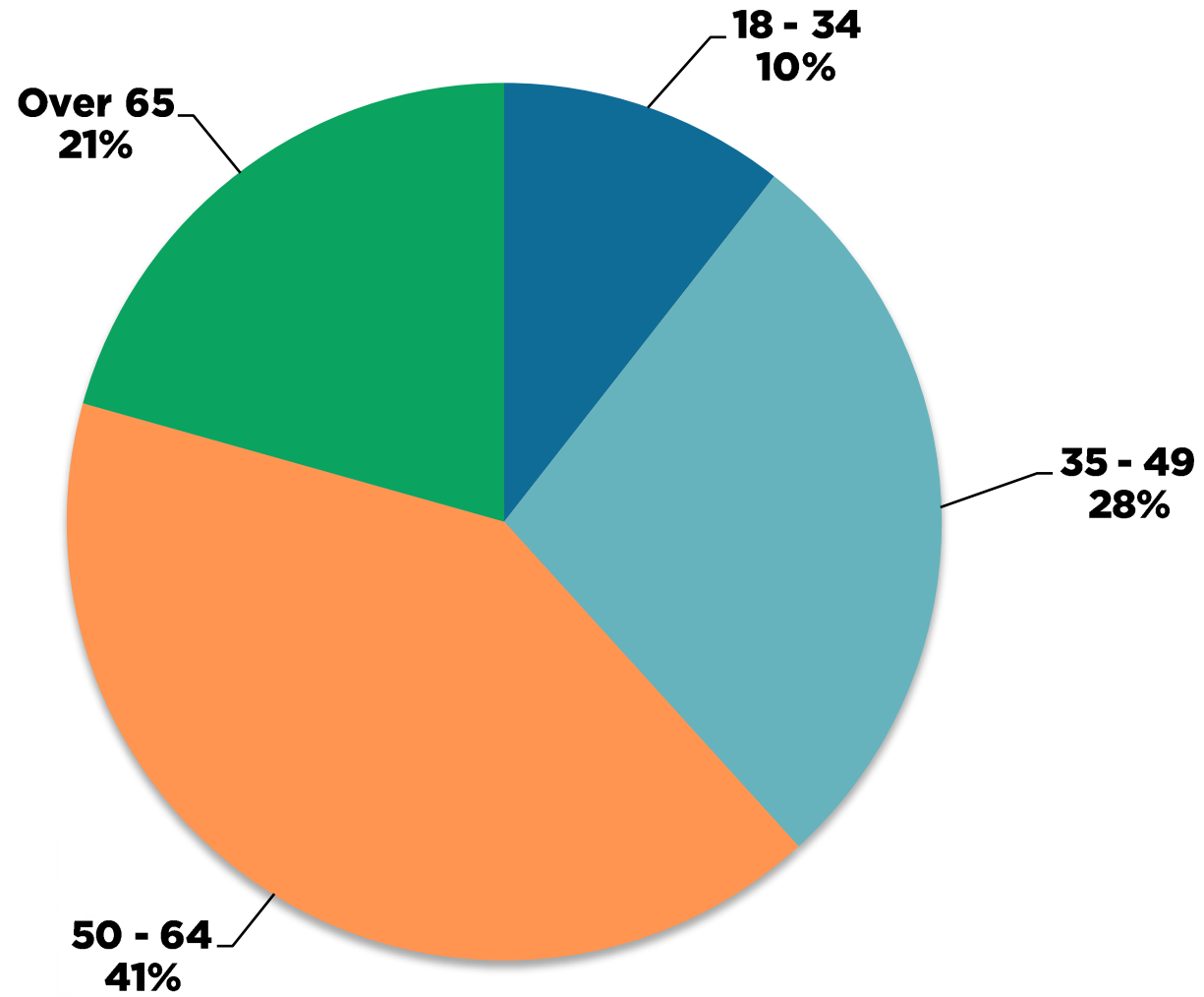
1,033 Responses - by Region



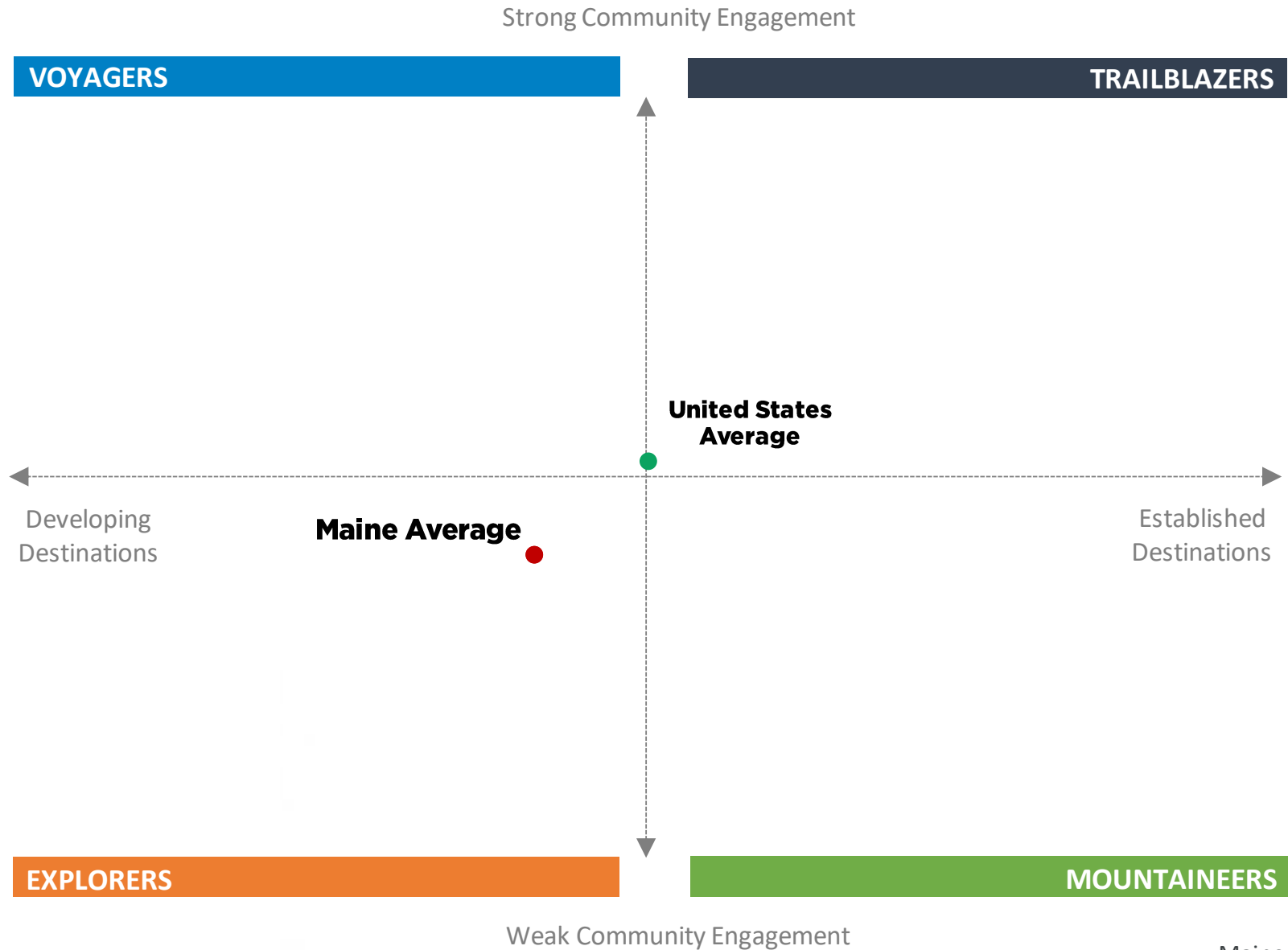
1,033 Responses – By Stakeholder



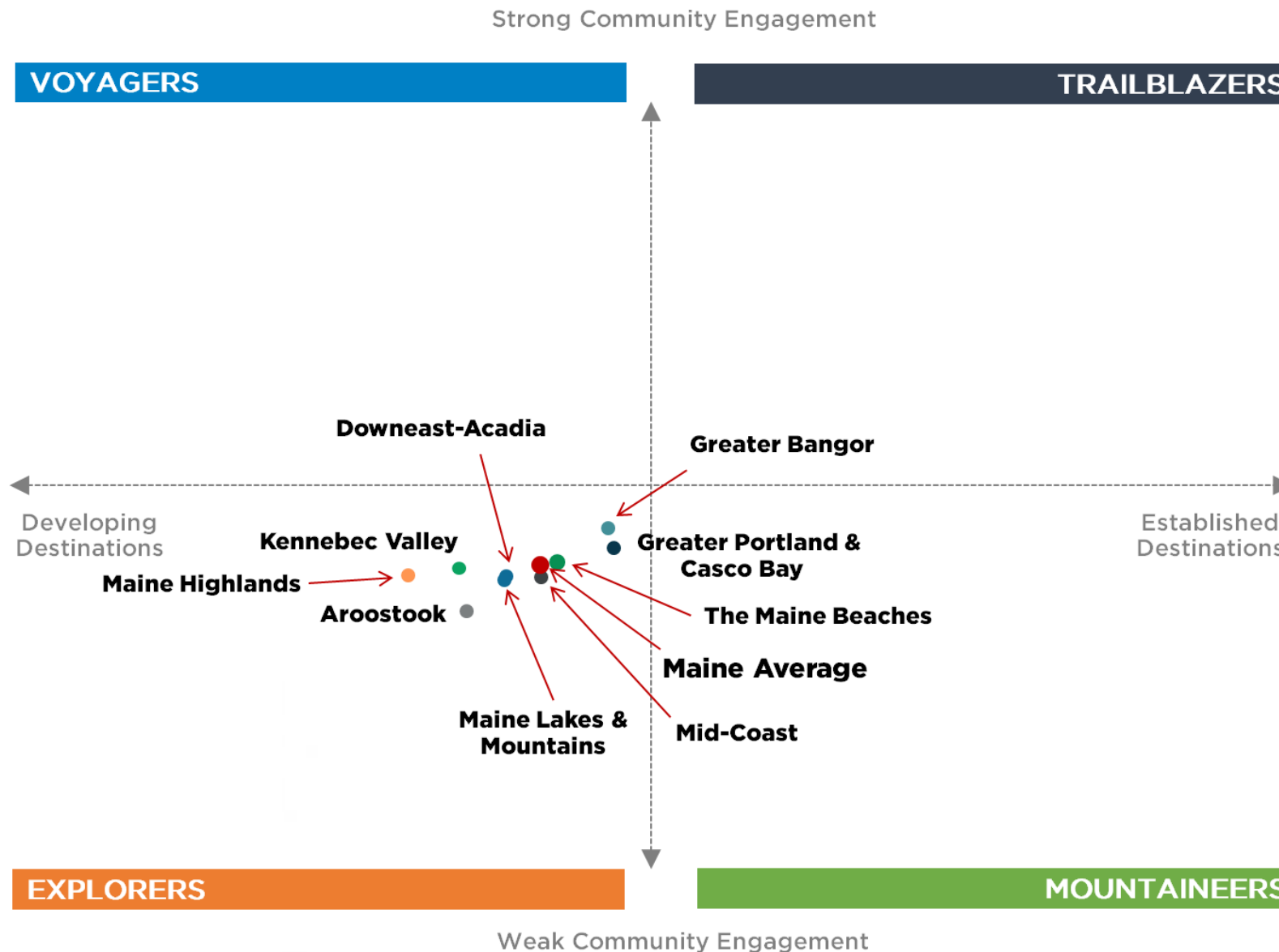
Age Demographic



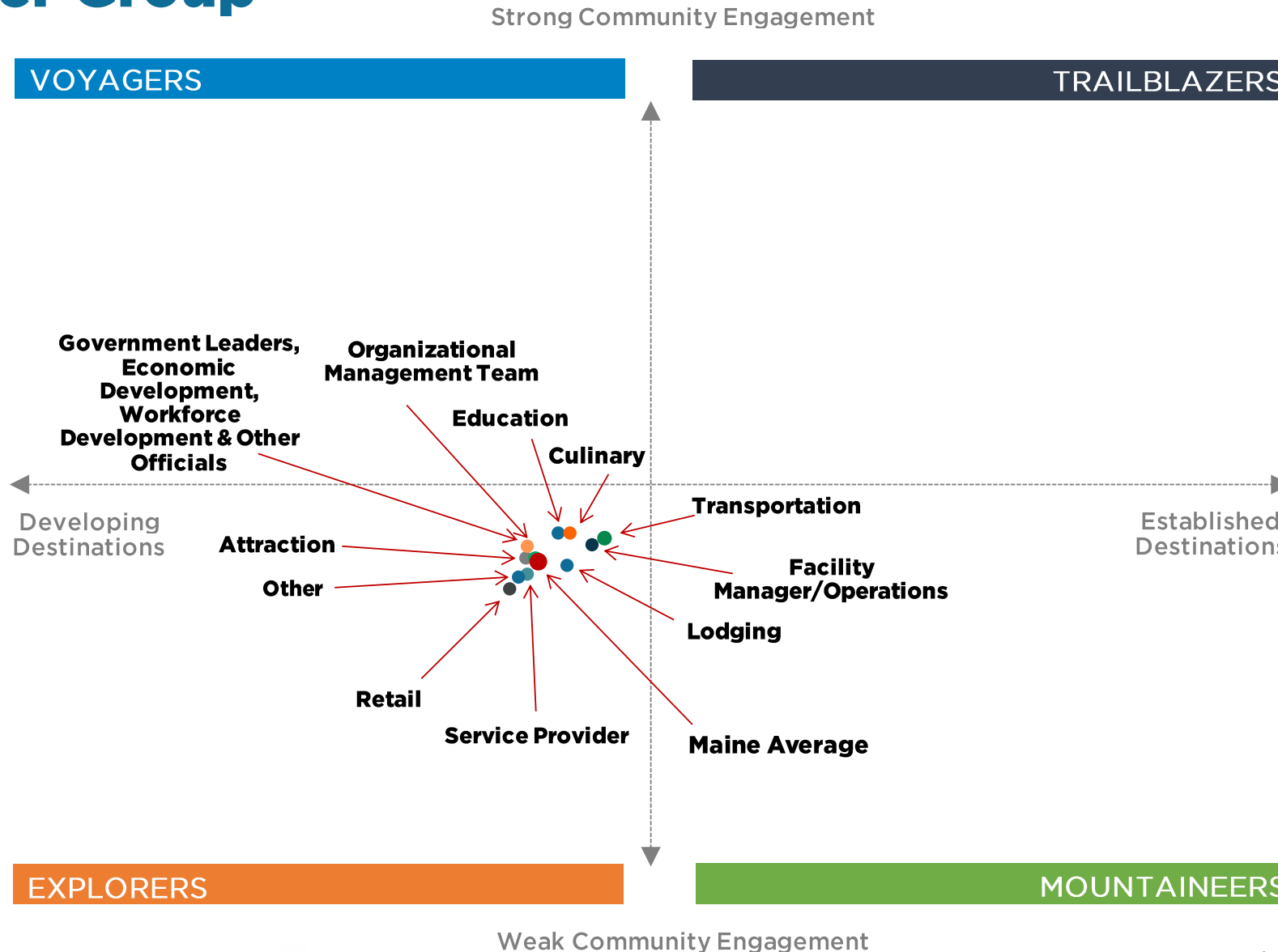
State of Maine Overall Assessment - Industry



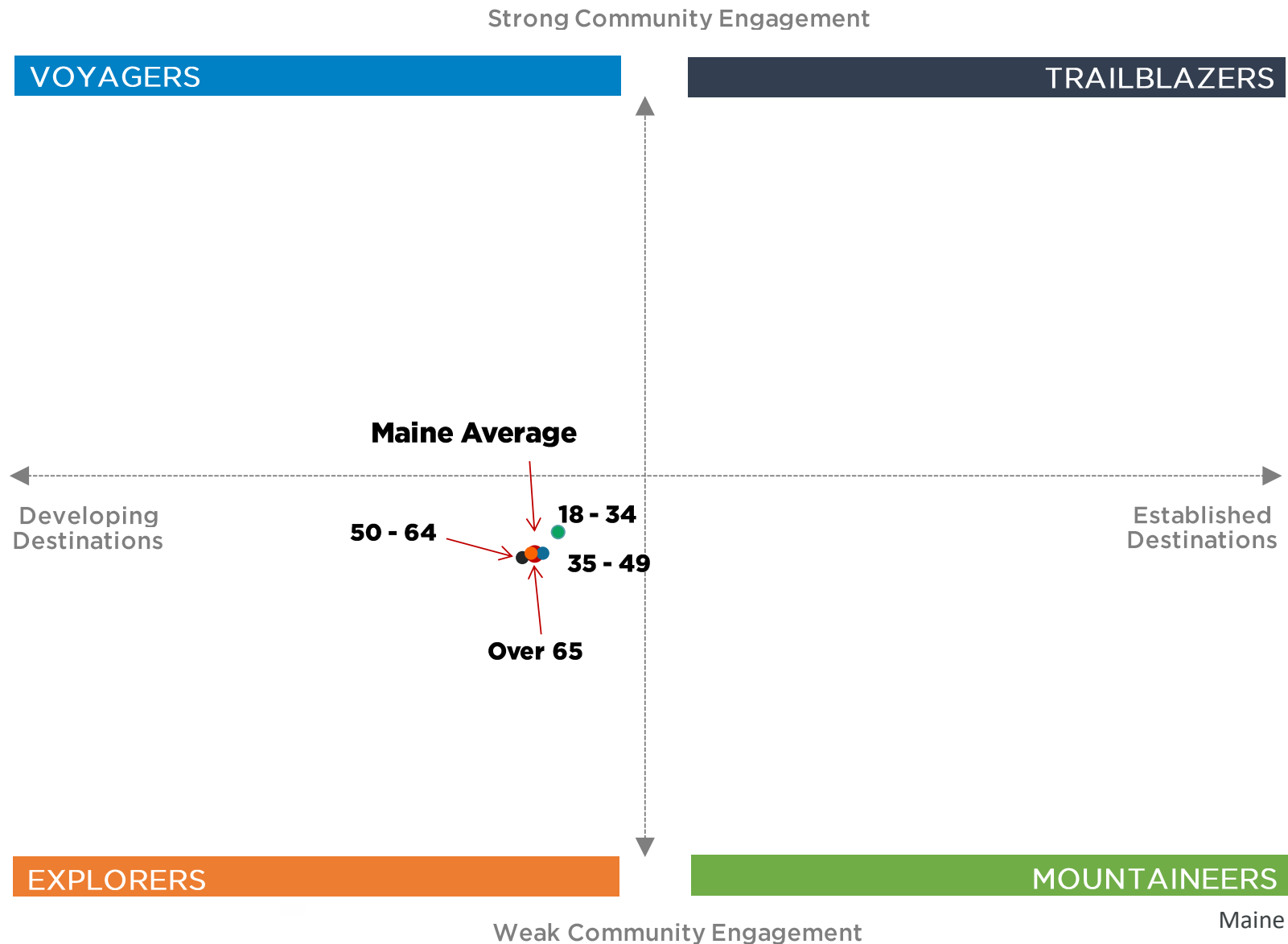
State of Maine Overall Assessment – Regions



State of Maine Overall Assessment – Stakeholder Group



State of Maine Overall Assessment – Age



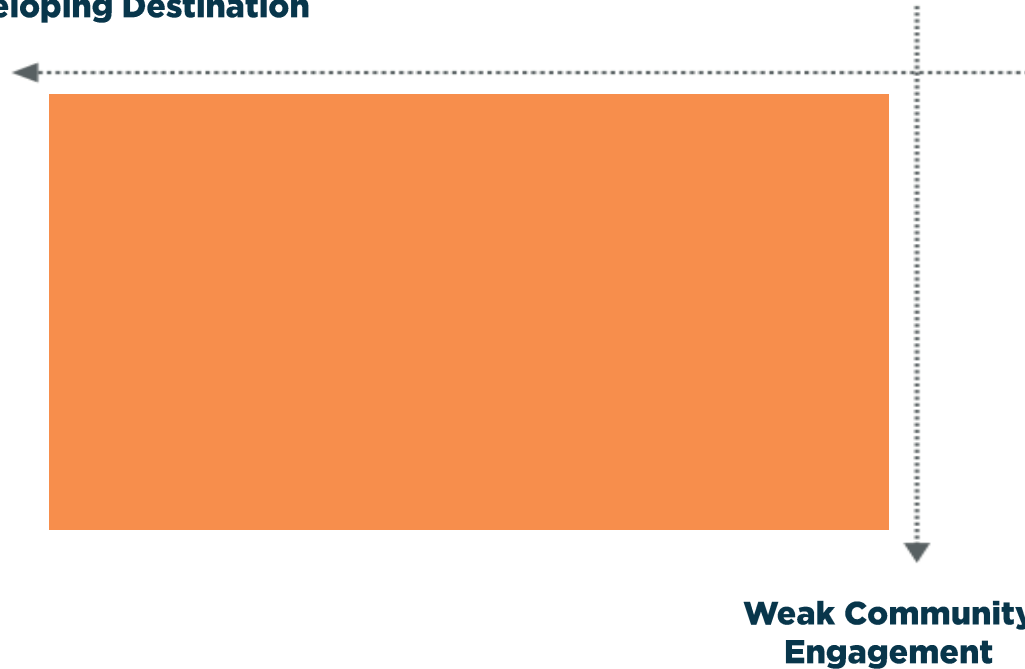
Explorers

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

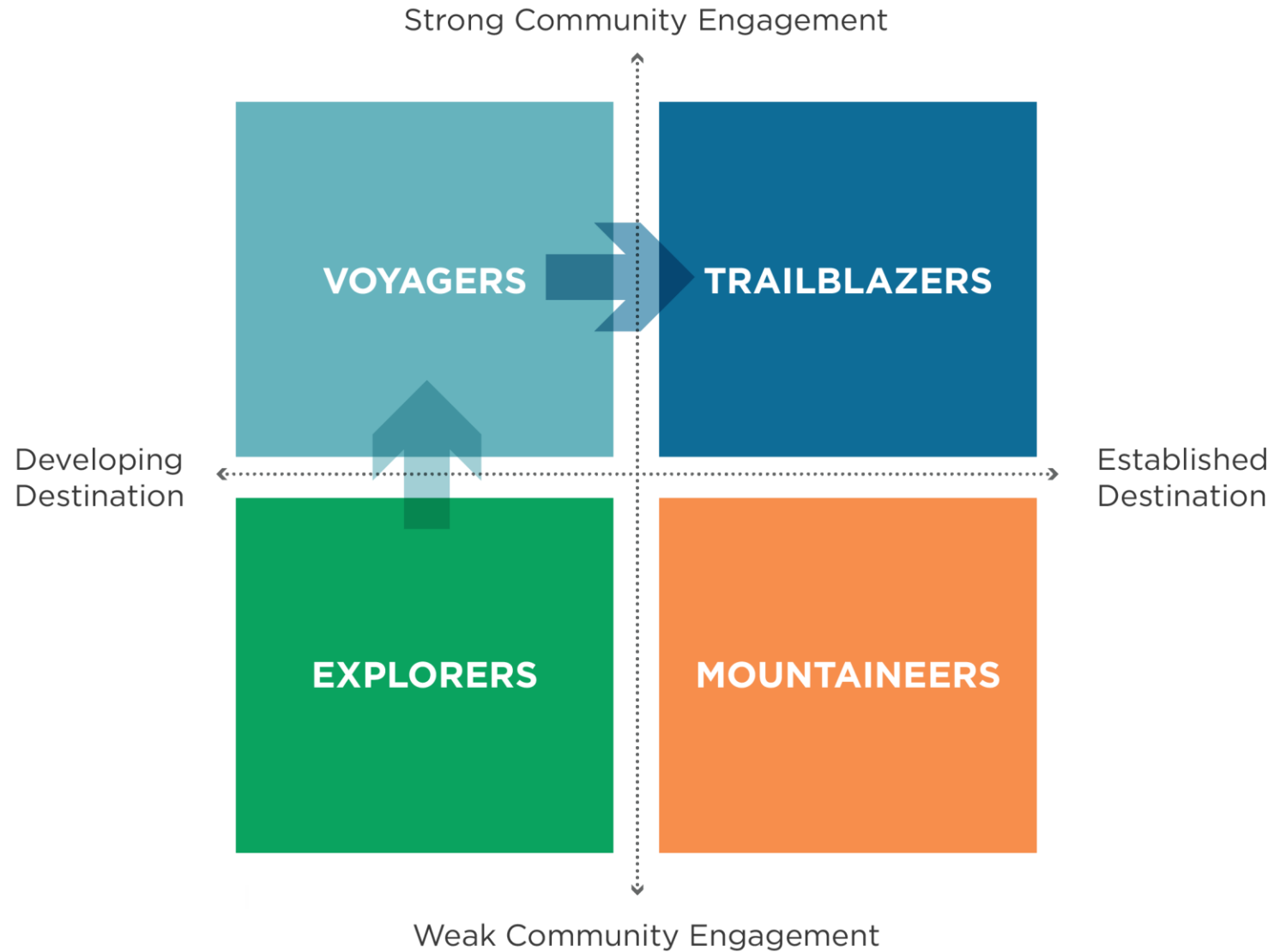
Key Strategic Challenges

- **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



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

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

Green shading signifies that the region outperformed the destination average by greater than 0.2.

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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	✓	✓					✓		

DESTINATION NEXT

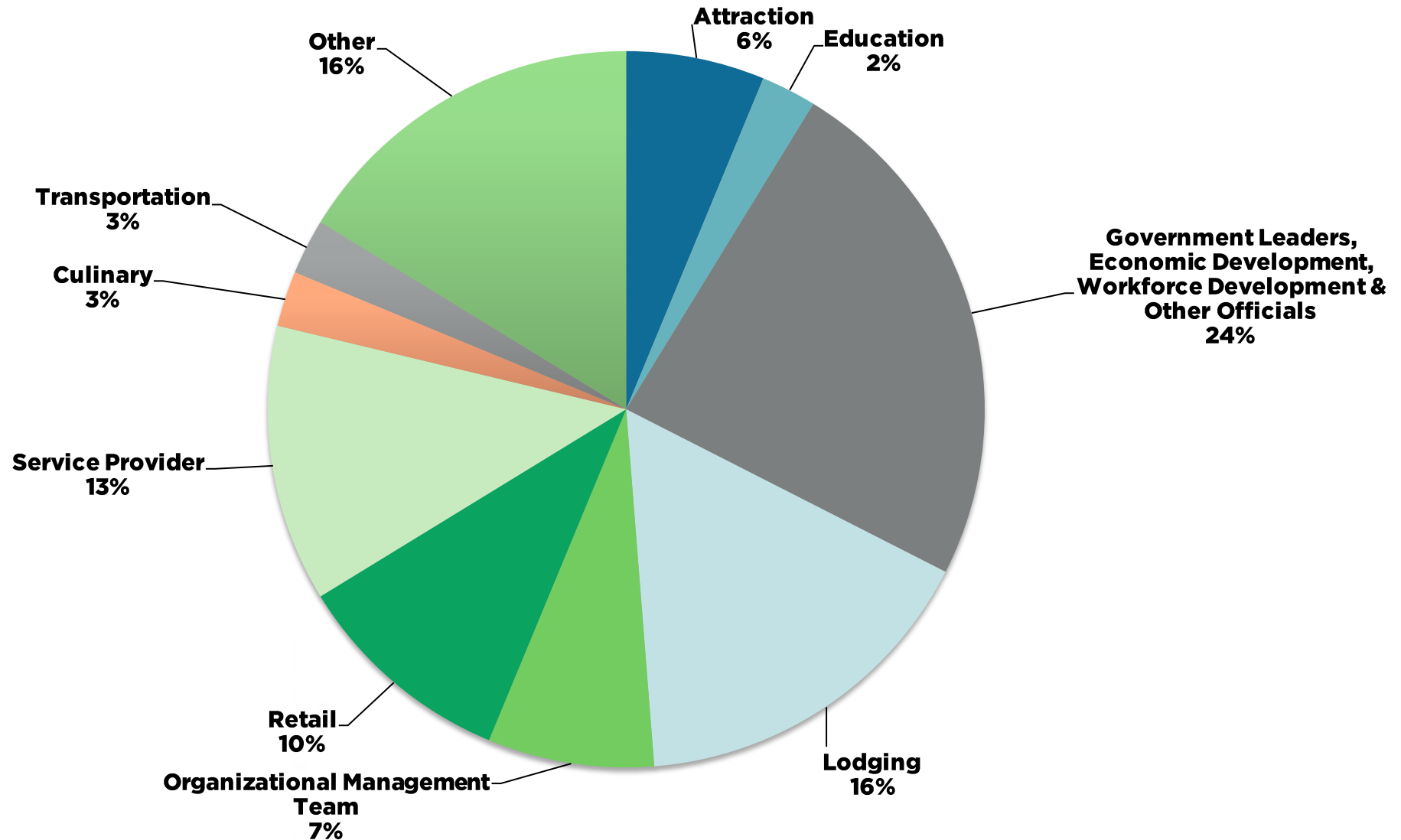
Multi-User Online Diagnostic
Tool Results:

State of Maine Assessment -
Maine Highlands

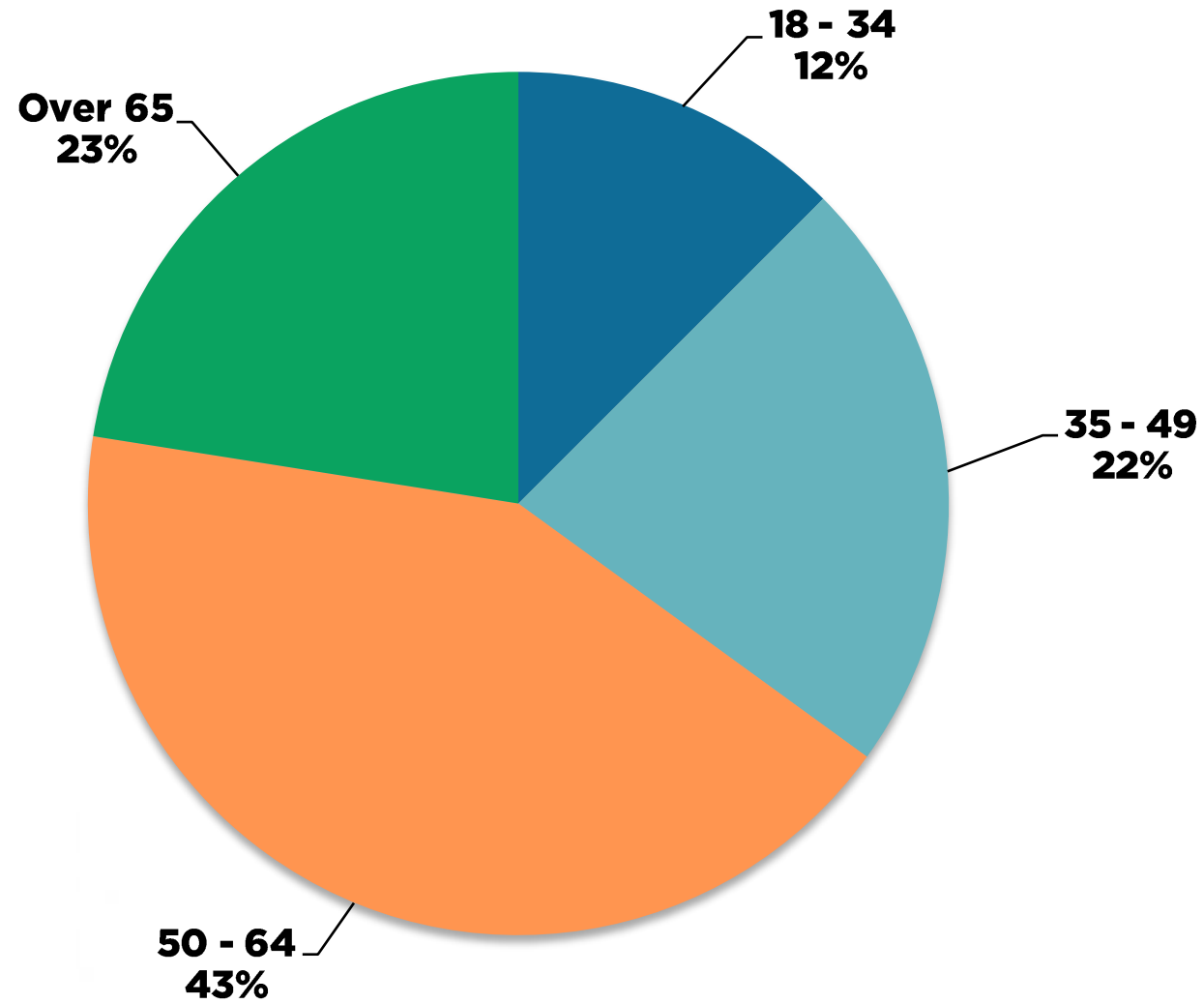
June 5, 2018



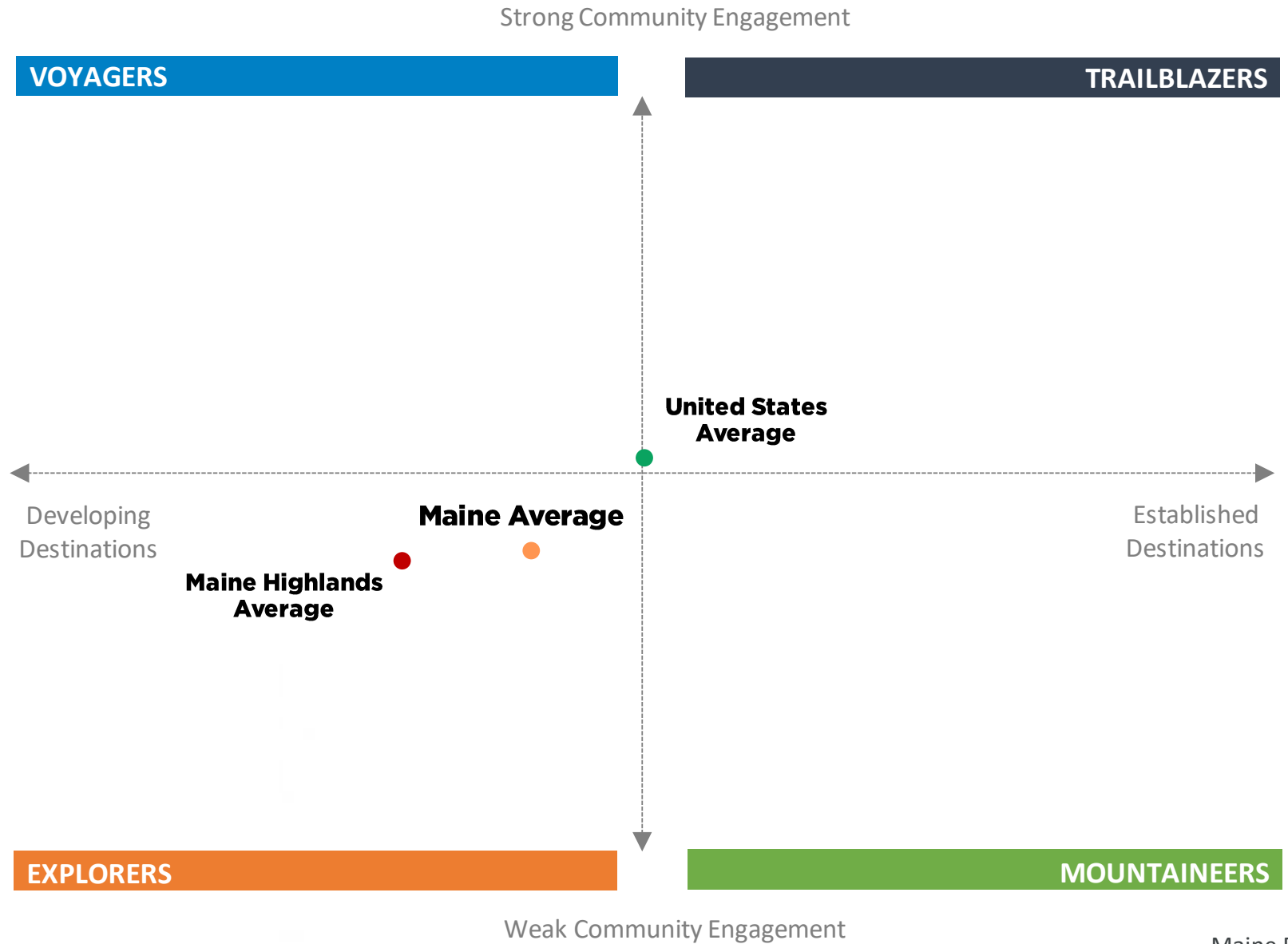
80 Responses



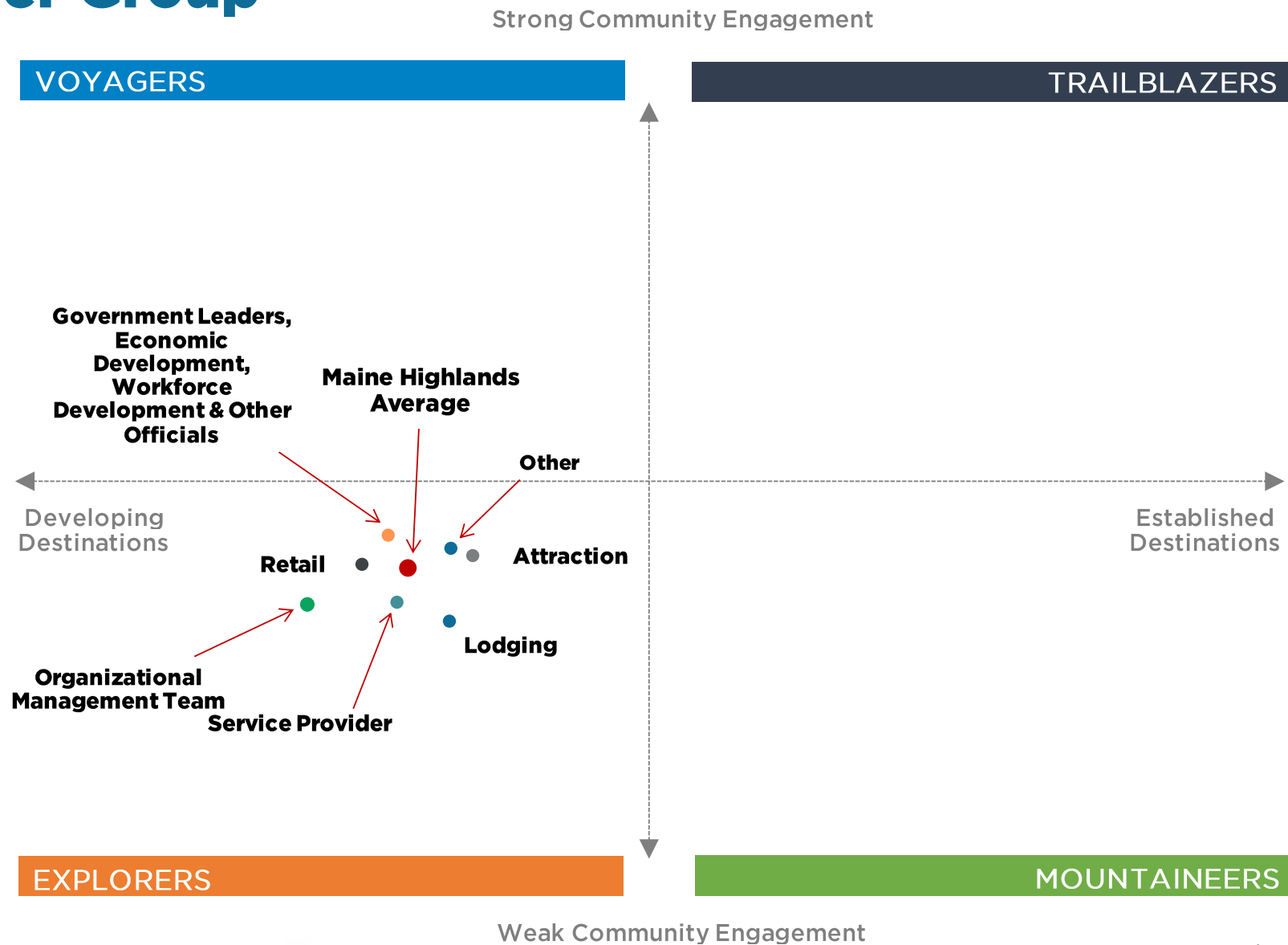
Age Demographic



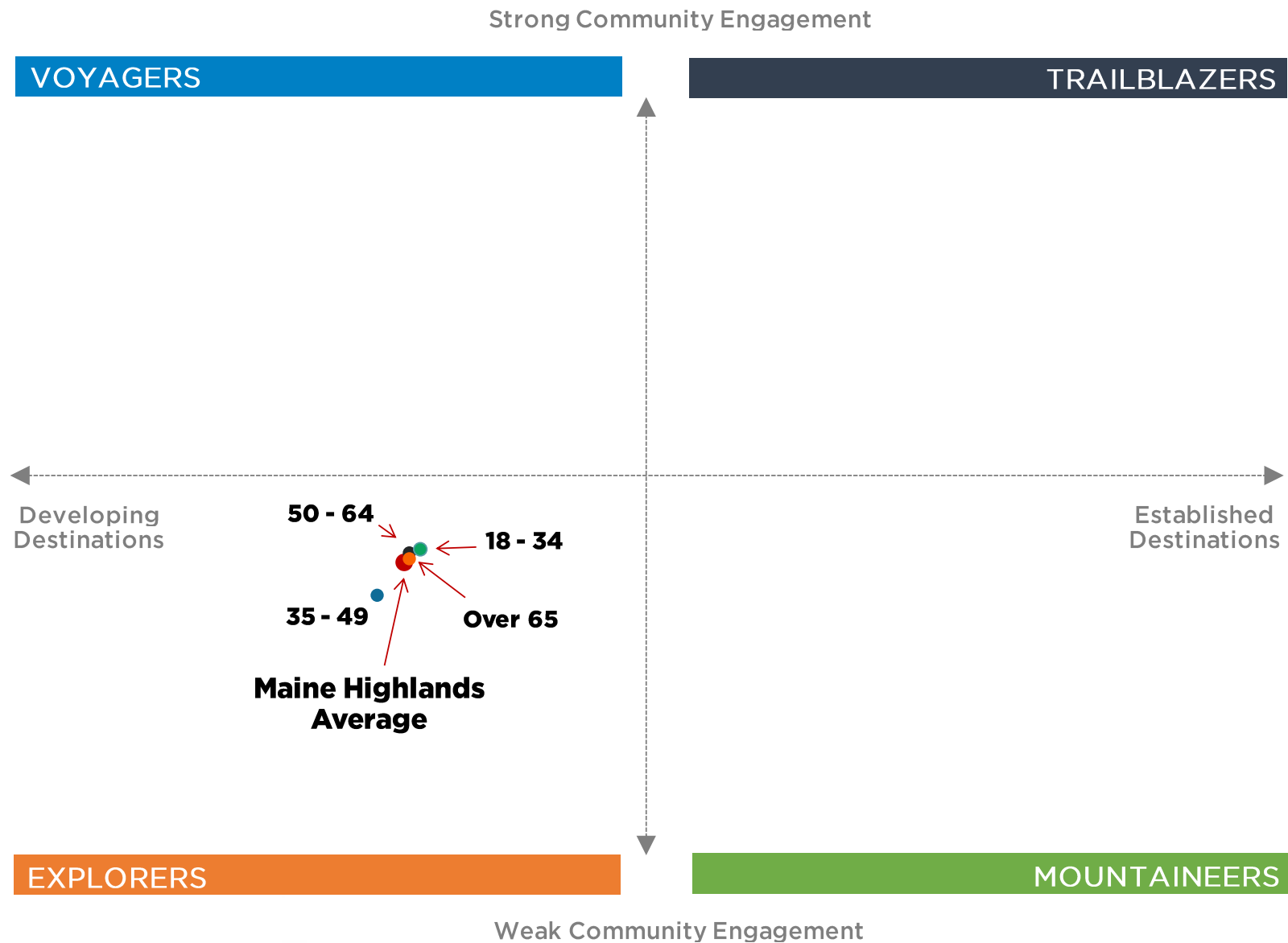
Maine Highlands Overall Assessment - Industry



Maine Highlands Overall Assessment – Stakeholder Group







Maine Highlands Overall Assessment – Age



Destination Strength Rankings – Maine Highlands



		Relative Importance	Perceived Performance
	Convention & Meeting Facilities	1 st	10 th
	Attractions & Entertainment	2 nd	3 rd
	Accommodation	3 rd	9 th
	Destination Performance	4 th	5 th

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Highlands Average	Standard Deviation	Industry Average	Maine Highlands Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.5%	2%	3.11	2.03	0.68
Attractions & Entertainment	10.8%	11.4%	2%	3.65	2.87	0.70
Accommodation	10.5%	11.4%	1%	3.54	2.32	0.70
Destination Performance	10.0%	10.9%	2%	3.88	2.71	0.62
Mobility & Access	10.1%	10.9%	1%	3.12	2.60	0.57
Brand	10.5%	9.9%	2%	3.49	3.31	0.54
Sports & Recreation Facilities	9.4%	9.4%	2%	3.29	3.09	0.68
Events	9.7%	8.5%	2%	3.63	2.85	0.70
Communication & Internet Infrastructure	10.1%	8.5%	2%	3.39	2.37	0.78
Air Access	9.2%	7.5%	3%	3.16	2.64	0.50

DESTINATION STRENGTH - Maine Highlands	2.67
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO EXPLORERS

Note

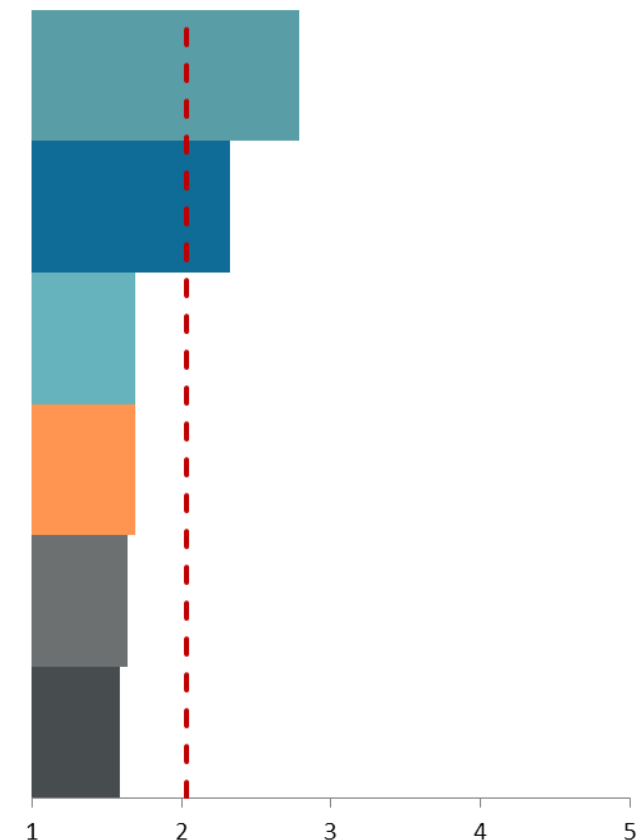
Green shading signifies that the destination outperformed the industry average by greater than 0.2.

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Convention & Meeting Facilities

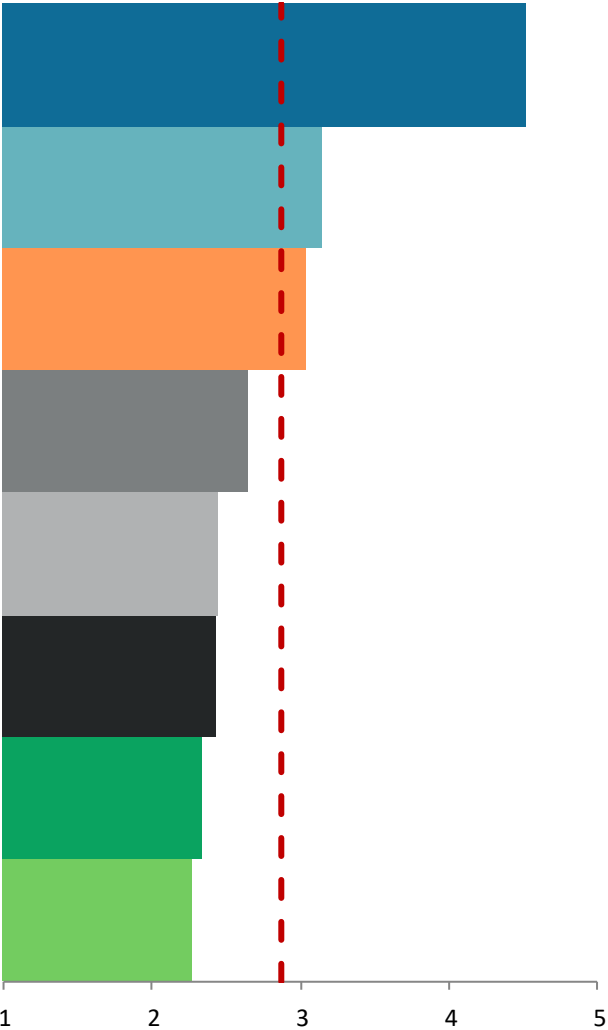
- Where possible, hotels/other meeting venues take full advantage of the views
- Has good, unique off-site venues for special events
- Has the necessary convention, meeting, and trade show facilities to compete today
- Convention center meeting and networking space is well branded
- Offers an abundance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

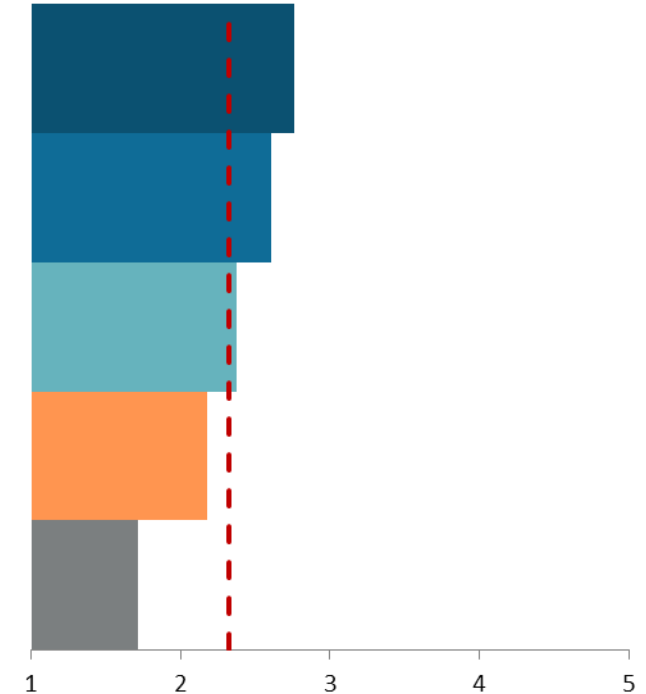
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)
- Has the type of large, famous attractions that cause people to stay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



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

Accommodation

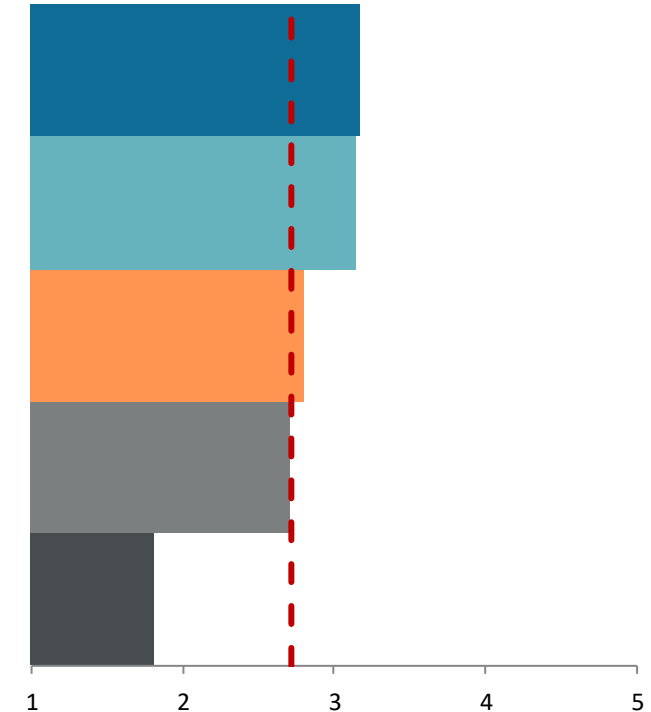
- Offers a diversity of accommodation price options
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate hotel accommodations capacity
- Has a healthy presence of well-known brand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



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

Destination Performance

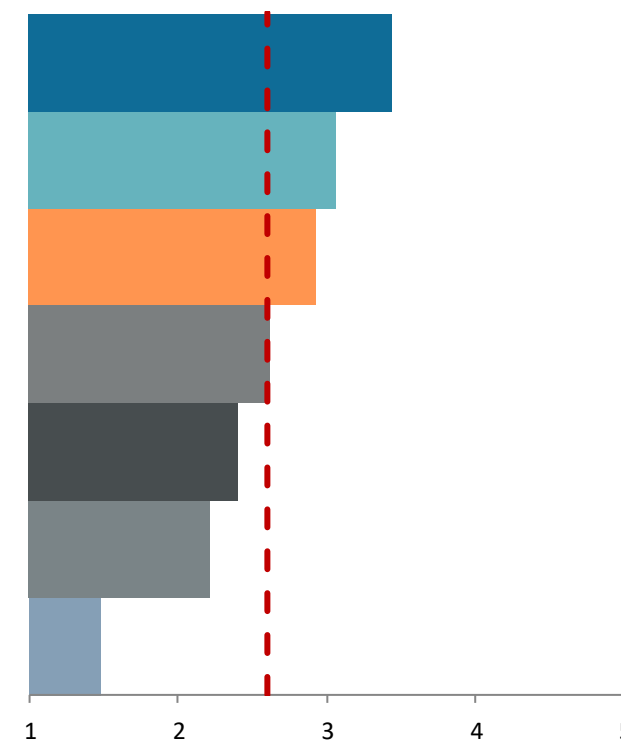
- Is experiencing a positive growth in overnight visitation
- Tourism industry performance is adequately measured and tracked
- Hotels are performing well (e.g. Occupancy, RevPAR)
- The tourism industry does a good job at communicating the performance and economic impact to the public
- Is successfully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



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

Mobility & Access

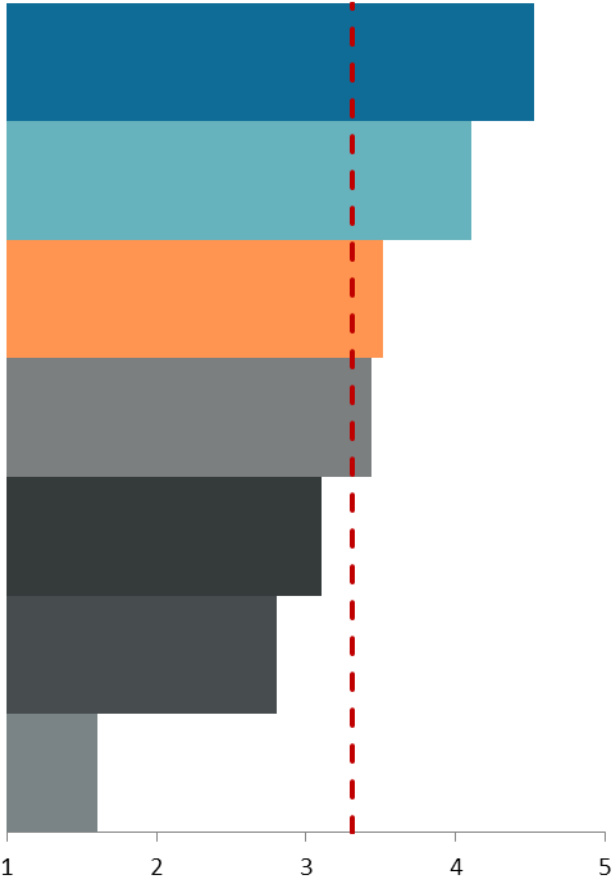
- Roads can easily handle residents, businesses and visitor traffic throughout the year
- Has great directional signage and highways that make it easy to get around
- Has adequate water access that makes it easy for visitors to get around
- There are a number of sufficient and visible information centers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

Brand

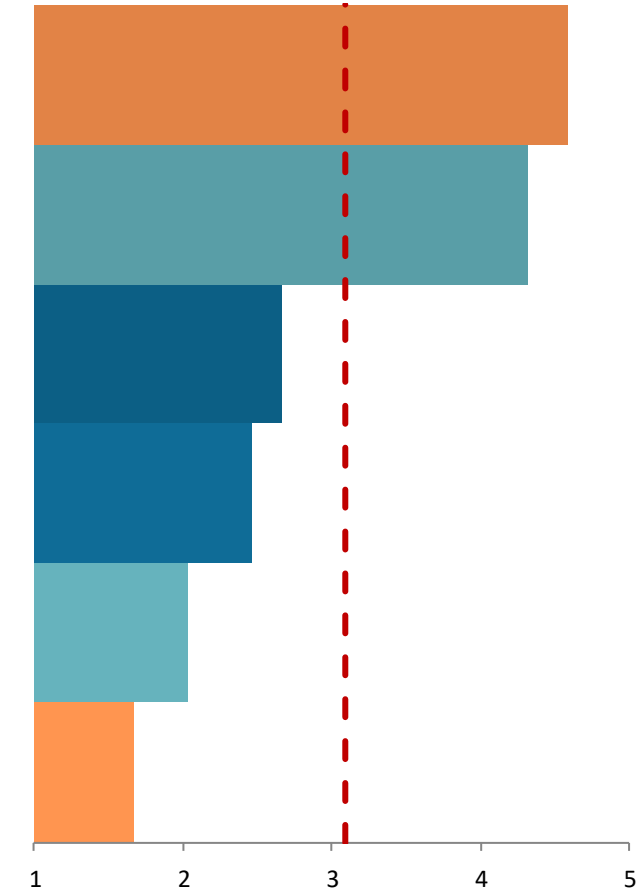
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for having a lot of things to see and do
- Is known for being environmentally conscious and sustainable
- Appeals to a diverse range of visitors
- Has an effective region-wide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



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

Sports & Recreation Facilities

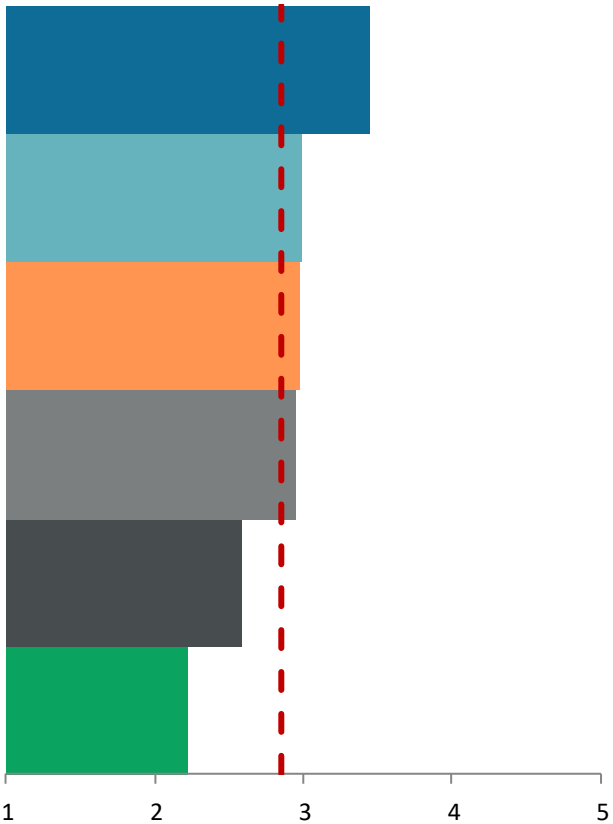
- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- The Maine Sports Commission is a useful resource and is properly utilized throughout the region
- Leadership representing sports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



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

Events

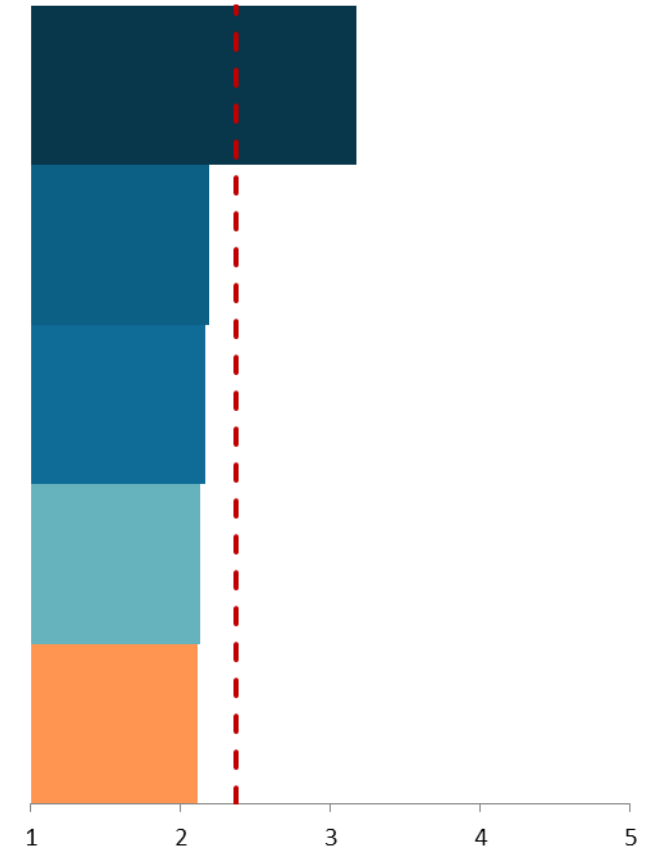
- Has an abundance of parks and outdoor spaces for handling special events
- The citizens of the region are supportive of hosting major sporting/national or international events
- Offers major events that attract non-local visitors
- Government is cooperative and supportive in attracting and hosting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



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

Communication & Internet Infrastructure

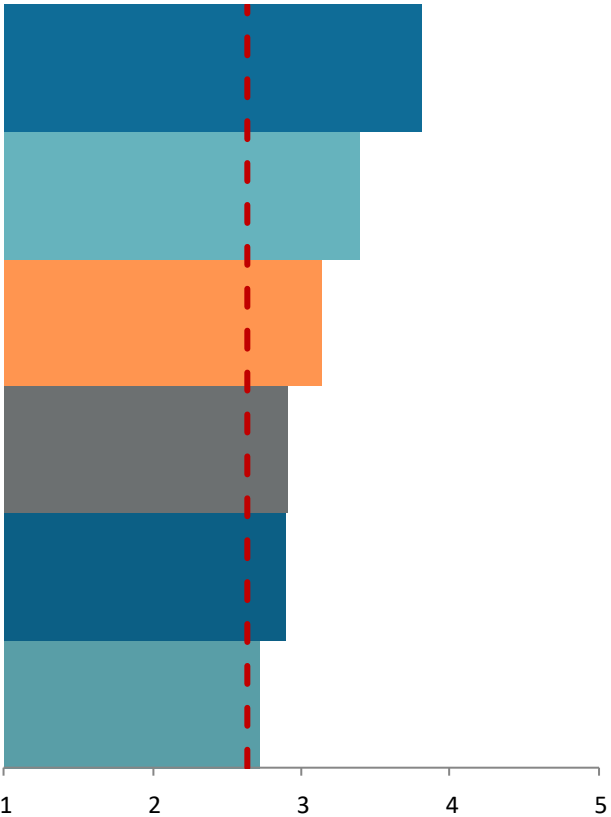
- Tourism industry uses and leverages social media to support the brand and market
- There is reliable mobile phone service covering all of the region's attractions
- Offers sufficient free Wi-Fi in outdoor/public areas with high visitor traffic
- Businesses have access to good broadband capacity to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



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 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 – Maine Highlands



Local Community Support

1st

5th



Economic Development

2nd

1st



Regional Cooperation

3rd

4th



Hospitality Culture

4th

8th

Community Support & Engagement – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Highlands Average	Standard Deviation	Industry Average	Maine Highlands Average	Standard Deviation
Local Community Support	10.2%	10.5%	1%	3.56	3.35	0.76
Economic Development	10.2%	10.3%	1%	3.95	3.96	0.70
Regional Cooperation	10.0%	10.3%	1%	3.76	3.37	0.90
Hospitality Culture	10.2%	10.3%	1%	3.71	3.02	1.06
Industry Support	9.9%	10.2%	1%	3.81	3.60	0.85
Workforce	10.1%	9.9%	1%	3.31	2.52	0.63
Funding Support & Certainty	9.9%	9.8%	3%	3.36	2.33	0.97
Effective Advocacy Program	10.2%	9.7%	1%	3.63	3.05	0.87
Membership Strength & Support	9.6%	9.7%	1%	3.76	3.44	0.85
Effective DMO Governance Model	9.6%	9.2%	1%	3.80	3.17	0.87

COMMUNITY SUPPORT & ENGAGEMENT - Maine Highlands	3.19
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

RESULTING SCENARIO EXPLORERS

Note

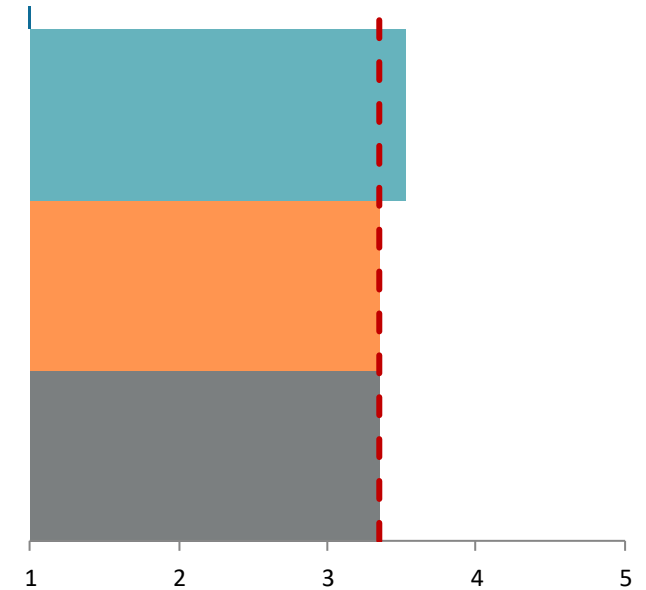
Green shading signifies that the destination outperformed the industry average by greater than 0.2.

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.

Local Community Support

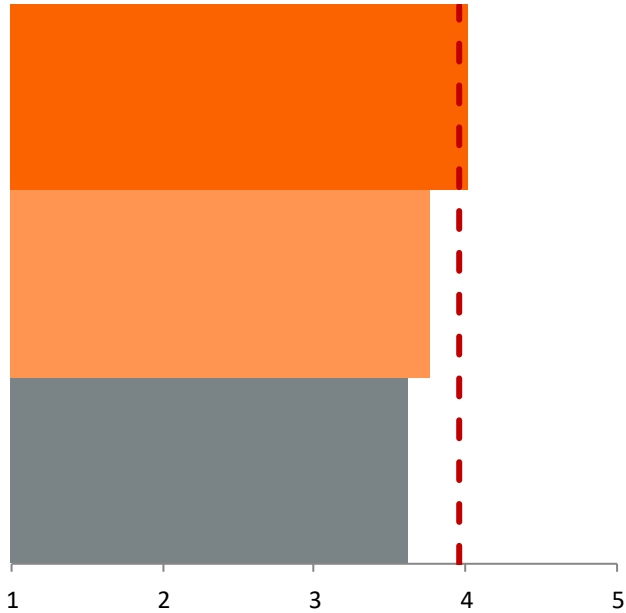
- The region's tourism industry has business support
- The region's tourism industry gets positive media coverage
- Stakeholders find value in partnerships that include other tourism regions



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

Economic Development

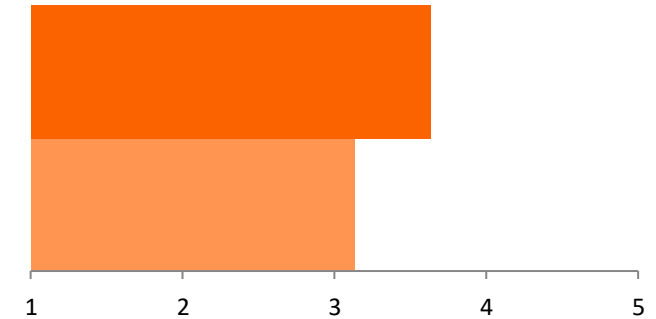
- Tourism is identified as a key economic driver for the region
- Tourism industry has a good working relationship with local chambers and/or economic development agencies
- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business development



Note
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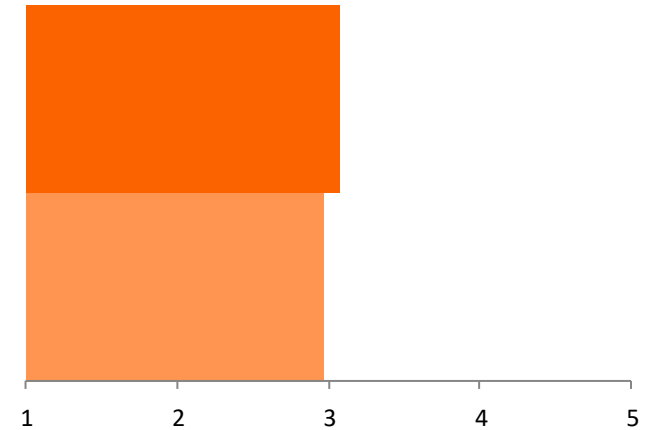
Regional Cooperation

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



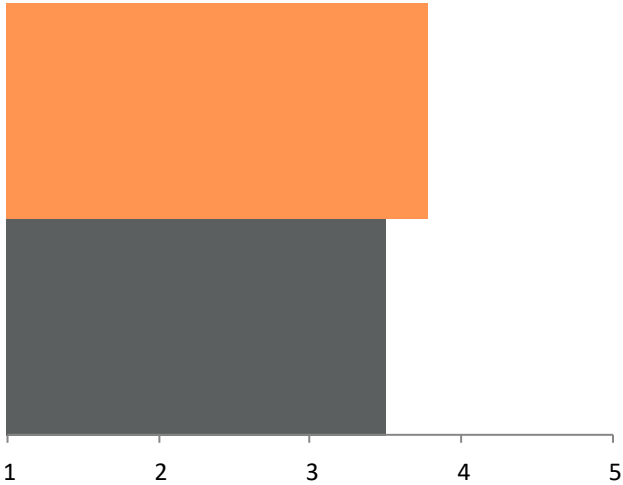
Hospitality Culture

- 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



Industry Support

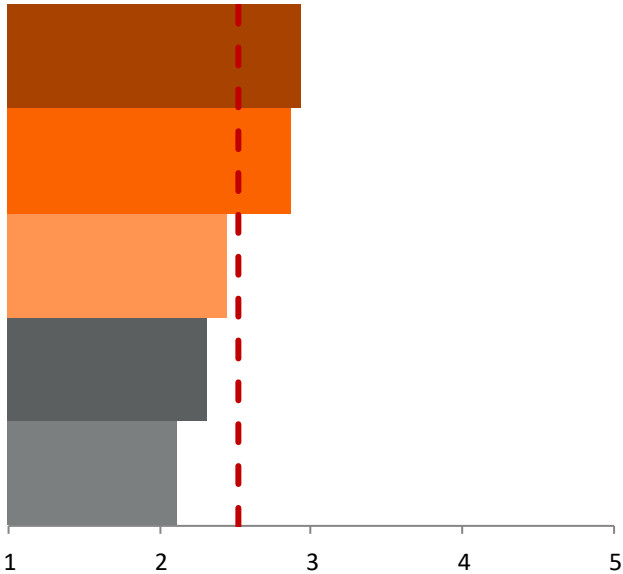
- Tourism industry leaders and stakeholders are supportive of the regional tourism industry
- Tourism industry leaders and stakeholders are investing in activities



Note
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Workforce

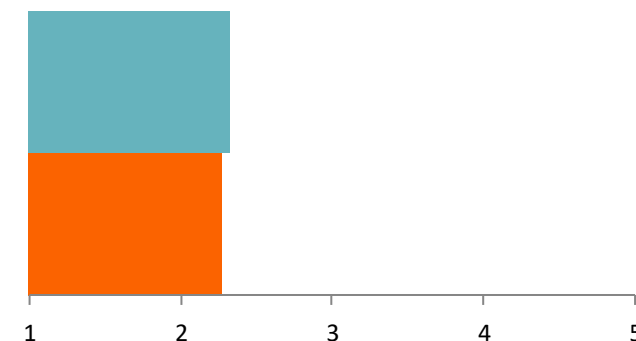
- The increase in rents and home prices has not affected the industry in terms of attracting employees
- The H2B visa restrictions have not affected businesses that cater to tourists or the hospitality industry workforce
- The region’s workforce is stable and has a positive labor relations environment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



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

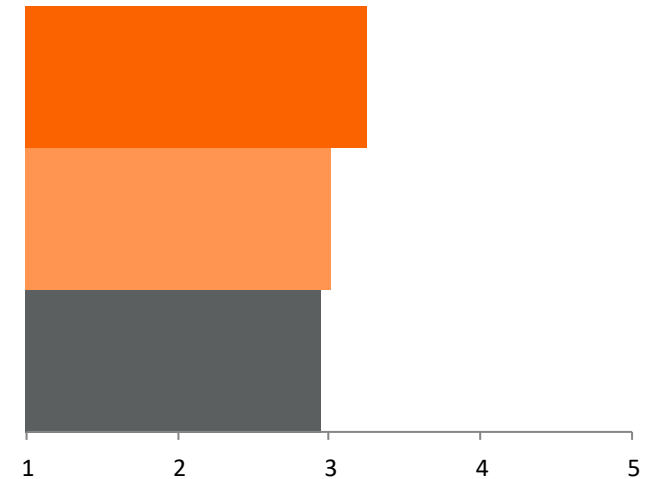
Funding Support & Certainty

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



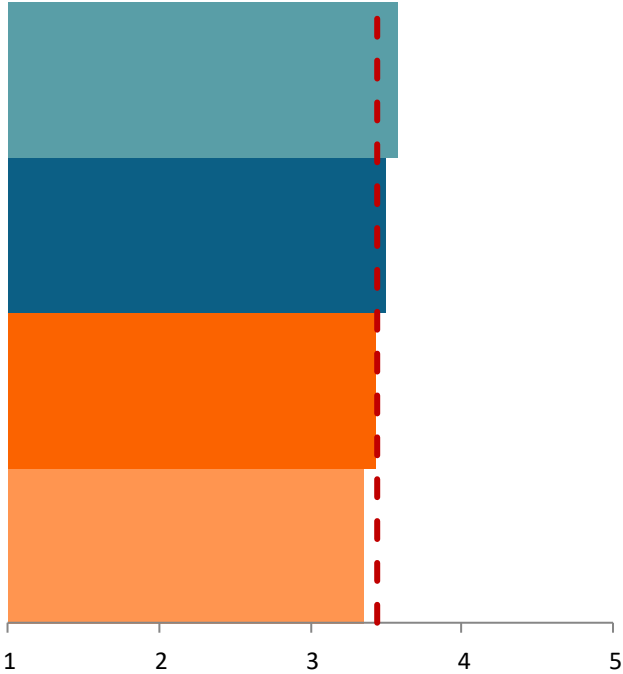
Effective Advocacy Program

- Local government is supportive of the tourism industry
- Local government relies on tourism stakeholders for input on the destination
- Tourism advocacy programs are successful in educating/informing government policy and regulatory matters



Stakeholder Strength & Support

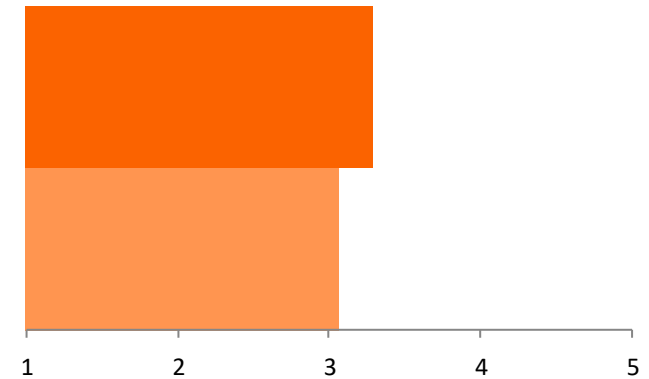
- Stakeholders are active, engaged and supportive of tourism development
- Stakeholders find value in region-wide partnerships
- Stakeholders are active, engaged and supportive of tourism marketing
- Stakeholders find value in partnerships that include other tourism regions



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

Effective Destination Organization Governance Model

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



Key Takeaways

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



Destination Opportunities

- **Meeting facilities**
- **Arts and cultural attractions**
- **Iconic attractions**
- **Unique vibrant neighborhoods**
- **Accommodation capacity**
- **Headquarter & brand hotels**
- **Public transportation**
- **Bike paths/pedestrian walkways**
- **Sporting & event venues**
- **Wi-fi & Broadband**



Community Support & Engagement Opportunities

- **Hospitality culture**
- **Regional collaboration**
- **Funding**
- **Advocacy**
- **Workforce**
 - **Hospitality education**
 - **Attract & retain high-quality workers**

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

Visitor Amenities & Experiential Product Development (28%)

- A more inviting downtown.
- Development of amenities and lodging
- Structural/Curb Appeal Upgrades for MOST Businesses
- Regional land use / economic development plan for the Katahdin region to guide tourism development and retain the unique culture and feel of the region
- Recommended itineraries for different groups of visitors or families
- More welcoming third spaces

Advertising, Marketing, PR & Branding (18%)

- Adhering to a consistent brand and message
- Better maps and directions for the area's attractions
- Branding the region
- Publicize the vast conserved areas surrounding Moosehead open to public access, and improving that access
- More consistent messaging
- Marketing
- Better advertising

Public Engagement & Regional Collaboration (16%)

- Better Community buy in. Better understand of the regions efforts throughout the community
- Valuing, supporting and speaking of our region for its unique forest, outdoor recreation, and cultural heritage. Visitors who might find their way here come to value our people and place, but how about us, do we value who we are as people of this place? Do we speak to this with pride and shared esteem?
- True community collaboration built on a solid destination plan
- Community vision and buy in!
- Community leadership support for tourism
- Partnerships local business

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

Outdoor Recreation & Sports (13%)

- Better snowmobile trail maintenance to attract more visitors
- Capitalizing on all trail systems
- Outdoor adventures
- Squaw Mountain
- Sale of Big Moose Mountain
- More outdoor exploration packages
- Rent recreational gear (ATVs, snowsleds, boats, kayaks, canoes, etc).
- Guided Adventures

Branding, Advertising, & Marketing (12%)

- More engagement with yelp, trip advisor, google reviews
- Market Maine to Massachusetts as a weekend destination
- Capitalize on the uniqueness of the destination - conserved land and largest lake
- Branding Draw from Katahdin Woods and Waters National Monument
- Better understanding of social media
- Rebranding the region
- One stop services

Accommodations (10%)

- Resort or Tourism facility Development
- Re-Investments in the Lodge
- Increase accommodation capacity
- Lodging/dining

What are the top tourism issues to address?

Advertising, Marketing & Promotion (14%)

- Targeted international advertising
- Strong regional marketing and communications program
- Promoting region on digital platforms
- Marketing rural tourism
- Inconsistent messages - who are we and who are we trying to attract
- Destination needs increased exposure
- Advertising for the region, getting the message out
- Getting a defined, clear and consistent story/message/images out to the world

Accommodations (13%)

- Adding mid-level lodging opportunities
- Develop lodging
- Lack of diversity in lodging and cuisine north of Bangor
- Lack of towns promoting all lodging places
- Places to stay year round
- Lodging within reasonable distance from attractions

Planning & Experiential Product Development (9%)

- Be authentic
- Business planning resources for tourism based business owners
- Uncovering and claiming and speaking to what is unique about us, the people and place
- Economic development
- Destination assets need to be developed
- Revitalize the downtown
- Develop the "experience" focus

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

Outdoor Recreation (40%)

- Adventure based tourism
- Weekend/week-long adventures (rafting, hiking, biking, etc.)
- Ski resort development
- Outdoor recreation and wilderness exploration
- Marketing all-season outdoor activities
- Interactive activities such as snowmobiling, atv trails, fishing, boating, etc.

Culinary & Micro-Breweries/ Agritourism (18%)

- Authentic culinary experience
- Culinary expansion in our struggling northern towns with high traffic... Millinocket, Greenville, Rangeley etc.
- Winery and brewery tours
- More farm to table growth in rural areas where the farms are
- Higher-end niche restaurants

Nature, Wellness, Ecotourism (9%)

- Bird watching, enjoying outdoor nature
- The Rural Maine Experience!
- People looking to disconnect, step back from, the frenetic digital work styles that are grinding up lots of people
- People wanting to step into the natural world, enjoying nature, families in nature
- Lifestyle - experience lake side lifestyle
- eco tourism market
- Nature based - hiking, kayaking, birding

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

Positive (44%)	Neutral/Minimal Impact (22%)	Negative (21%)
<ul style="list-style-type: none"> • Will positively affect as another attraction for visitors • Increased visitation and revenue via tax • Farmers will have another marketable crop to produce. Taxes from sales will help reduce tax commitment of other residents • Extra income, more business opportunity • Farmers will have another marketable crop to produce. Taxes from sales will help reduce tax commitment of other residents. 	<ul style="list-style-type: none"> • I do not believe the legalization of Marijuana will affect the region in any way • Little impact either way • Not tons...there is a local growing group, but not organized or promoted • Long term neutral • Too soon to tell. I don't think it will have a significant impact 	<ul style="list-style-type: none"> • Negatively. The small local communities have not addressed the rules regarding these businesses, how to keep the products out of the hand of youth, etc. Frankly, their ability to address the issues is limited as volunteer leaders • Gateway drugs will never positively impact a region that has a lower than normal education rate coupled with a higher than normal welfare dependence. Marijuana legalization for this population will create an even larger Opioid problem for the region • It will negatively affect the region by degrading the energy, focus and reliability of workers • I think crime will go up and I think more undesirable people will flock into area



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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