

DESTINATION NEXT

Maine Statewide Assessment - Midcoast

June 6, 2018

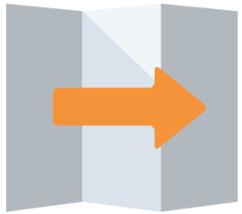


Paul Ouimet

DestinationNEXT

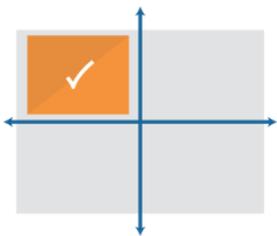
Vision:

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



Futures Study

- 75 trends & 55 strategies
- 433 respondents in 52 countries



Scenario Model & Assessment Tool

- 4 unique scenarios
- 163 detailed assessments in 11 countries

Maine - 8 Regional Assessments

April 10

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

April 11

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

April 12

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

April 13

- **Bangor: Maine Highlands**

October 16

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

October 17

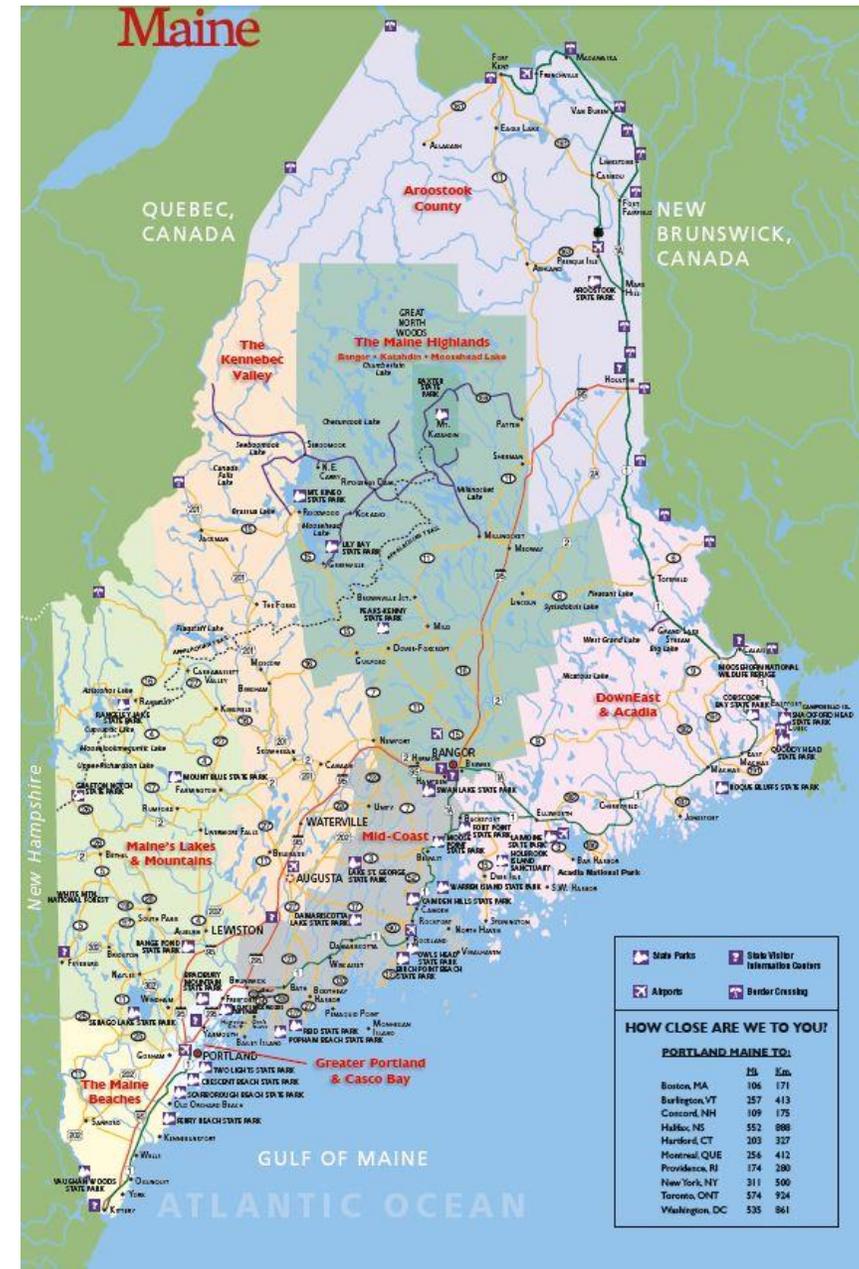
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

October 18

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

October 19

- **Biddeford: The Maine Beaches**



Today's Objectives

1. Present scenario model & overall DestinationNEXT findings
2. Review assessment results for Maine and region
3. Discuss NEXTPractices
4. Discuss potential initiatives & next steps



SCENARIO MODEL

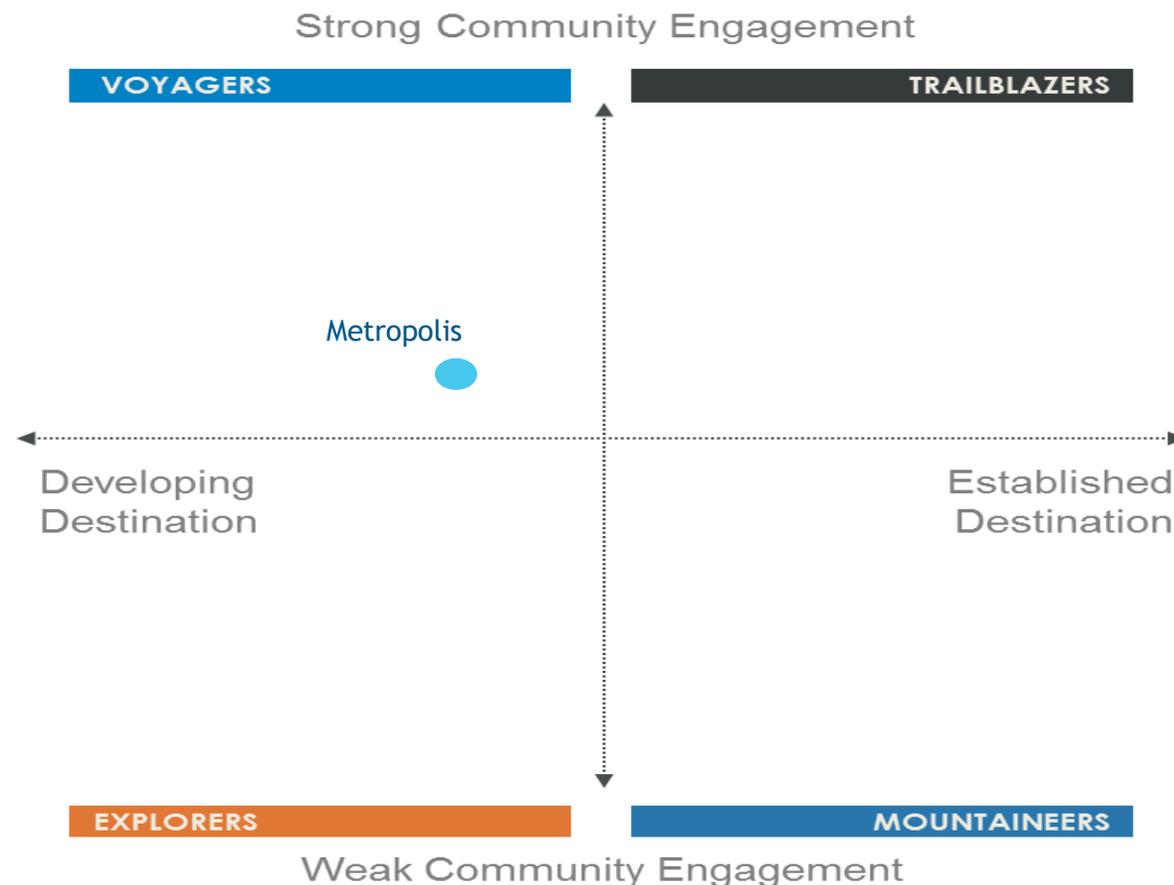
Scenario Model



Purpose of Diagnostic Tool

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

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



Destination Strength Variables



**Destination
Performance**



Brand



Accommodation



**Attractions and
Entertainment**



**Conventions & Meeting
Facilities**



Air Access



Events



**Sporting and
Recreation Facilities**



**Communication &
Internet Infrastructure**



Mobility and Access

Community Support & Engagement Variables



**Effective DMO
Governance Model**



**Membership Strength
& Support**



Industry Support



**Local Community
Support**



**Policy and
Regulatory Environment**



Workforce



Hospitality Culture



Regional Cooperation



**Funding Support &
Certainty**



Economic Development

Destination Assessments



350

destinations from
18 countries



163

detailed
assessments
completed in 11
countries



70

underway or
planned,
including 4 other
countries



60

in discussions,
including
14 other countries

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

Dominican Republic, El
Salvador, Ecuador
South Africa

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

Canada



Latin America



Europe



Asia/Australia



Regional Assessments



**Northwest Florida
Tourism Coalition**

**South Africa
Convention Bureau**

Global **Results**

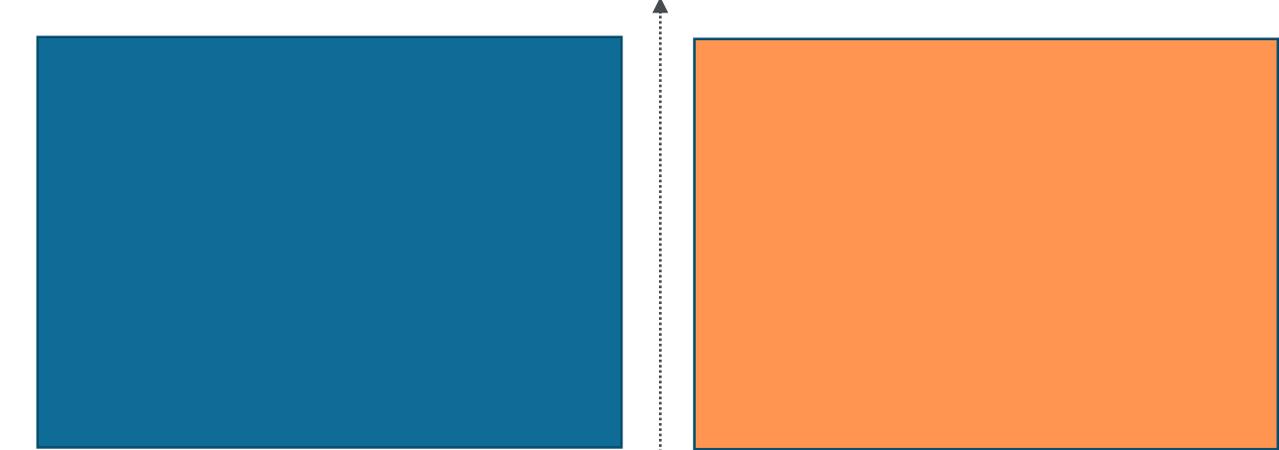
Scenario Model

VOYAGERS
10%

Strong Community Engagement

TRAILBLAZERS
41%

Developing
Destination



Established
Destination

EXPLORERS
40%

Weak Community Engagement

MOUNTAINEERS
9%

Destination Strength Rankings – Global Averages



Relative Importance



Brand

1st



Destination Performance

2nd



Attractions & Entertainment

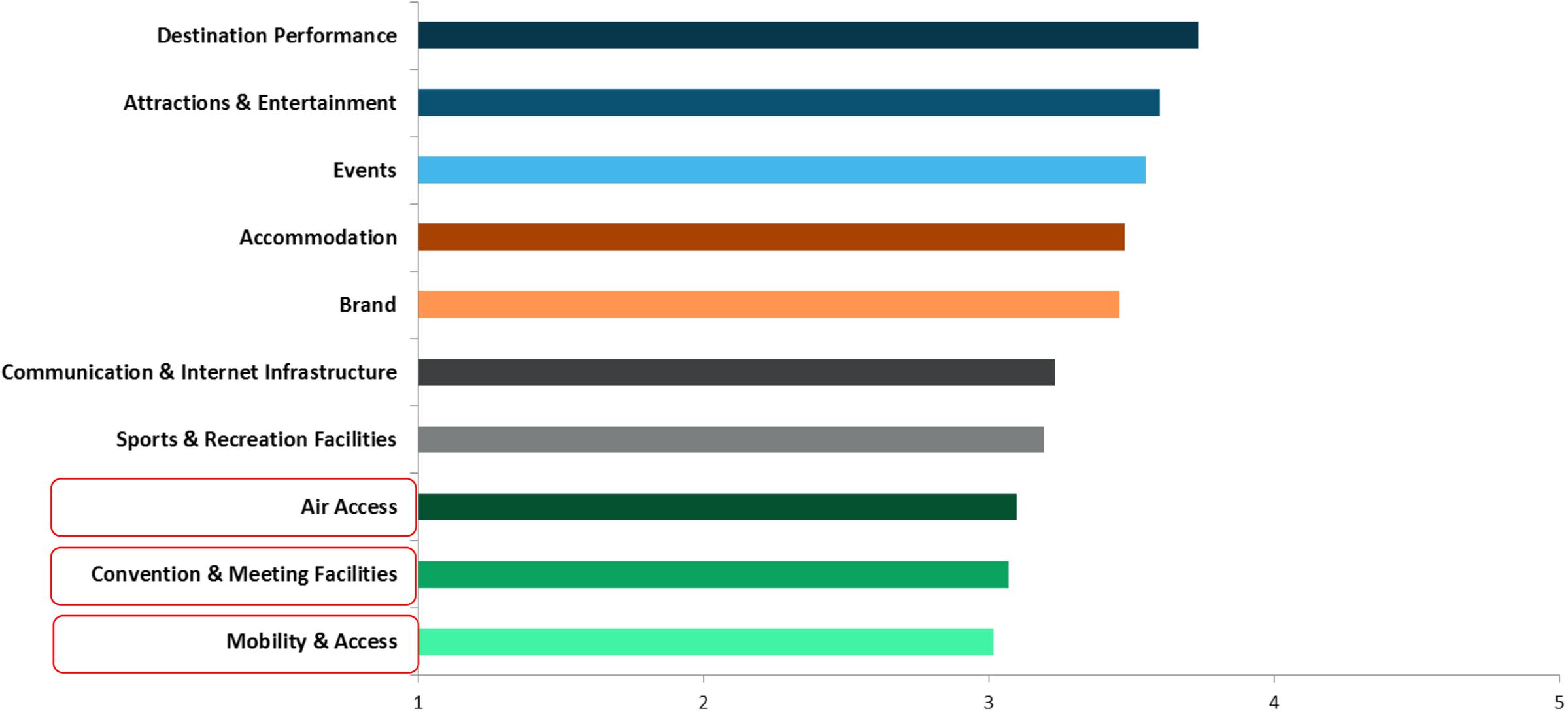
3rd



Accommodation

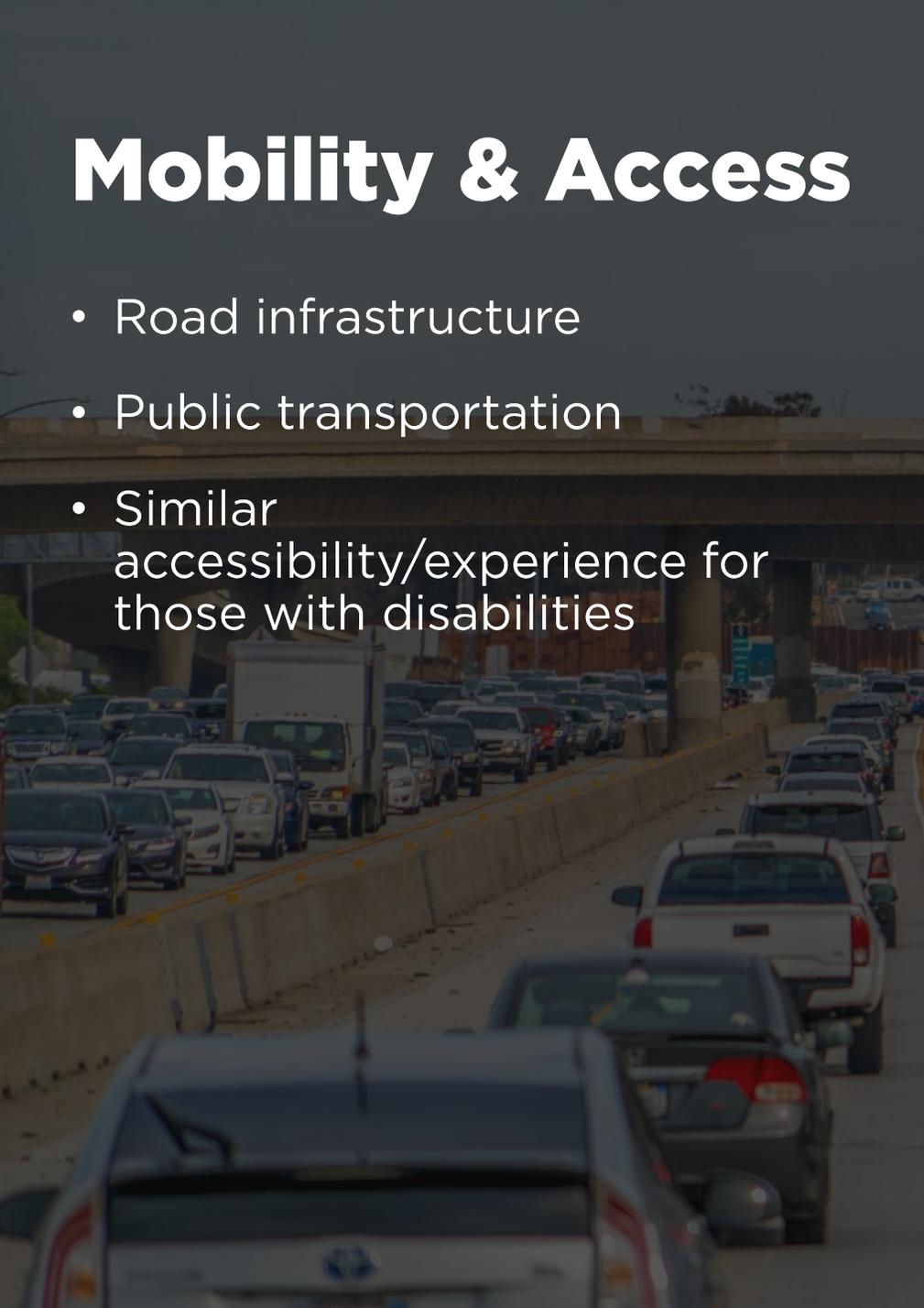
4th

Destination Strength Performance



Mobility & Access

- Road infrastructure
- Public transportation
- Similar accessibility/experience for those with disabilities



Convention & Meeting Facilities

- Necessary convention and meeting space to compete in the long-term
- Unique, off-site venues for special events



Air Access

- Airport “sense of place”
- International air access (number of flights and capacity)
- Domestic air access (number of carriers and low-cost options)

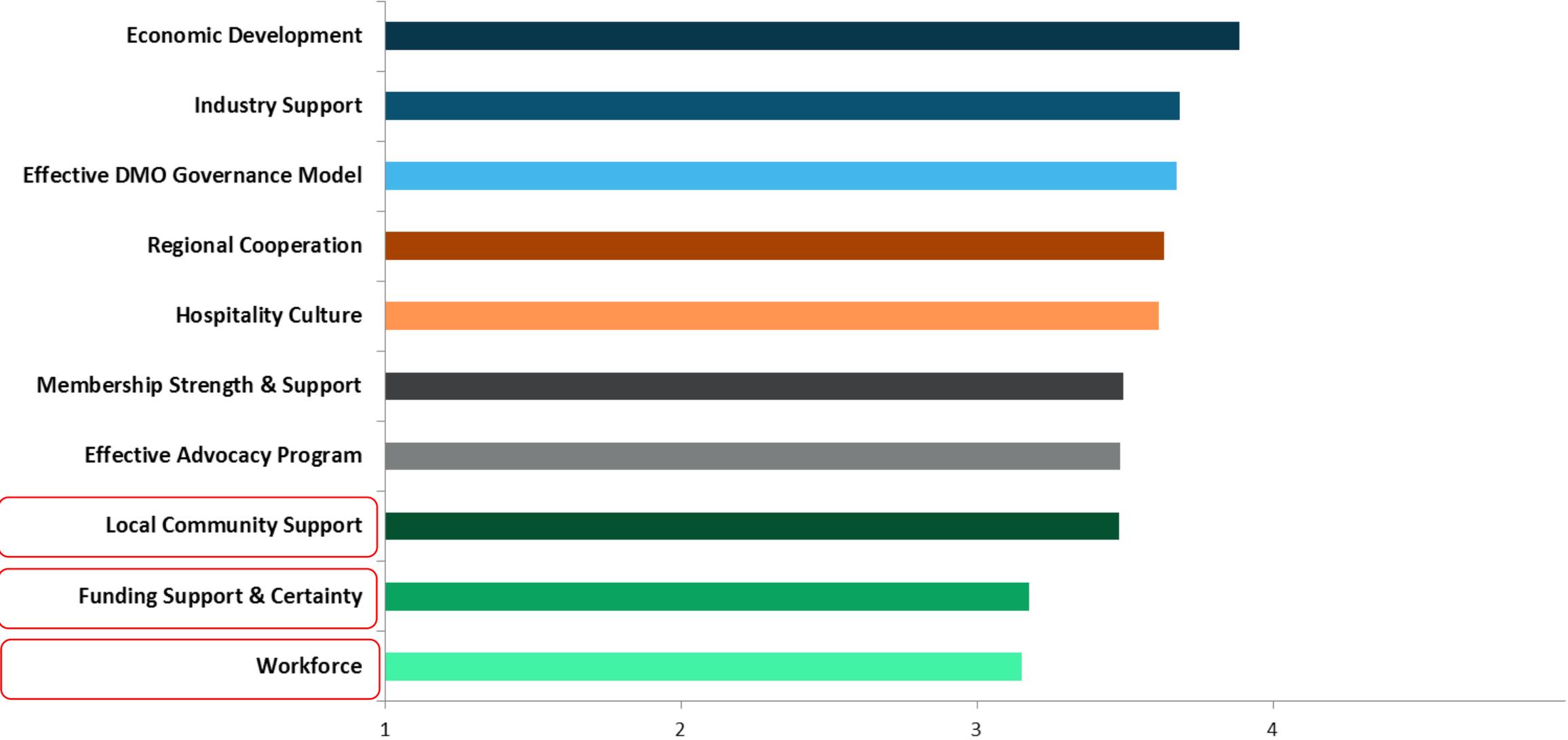


Community Support & Engagement – Global Averages



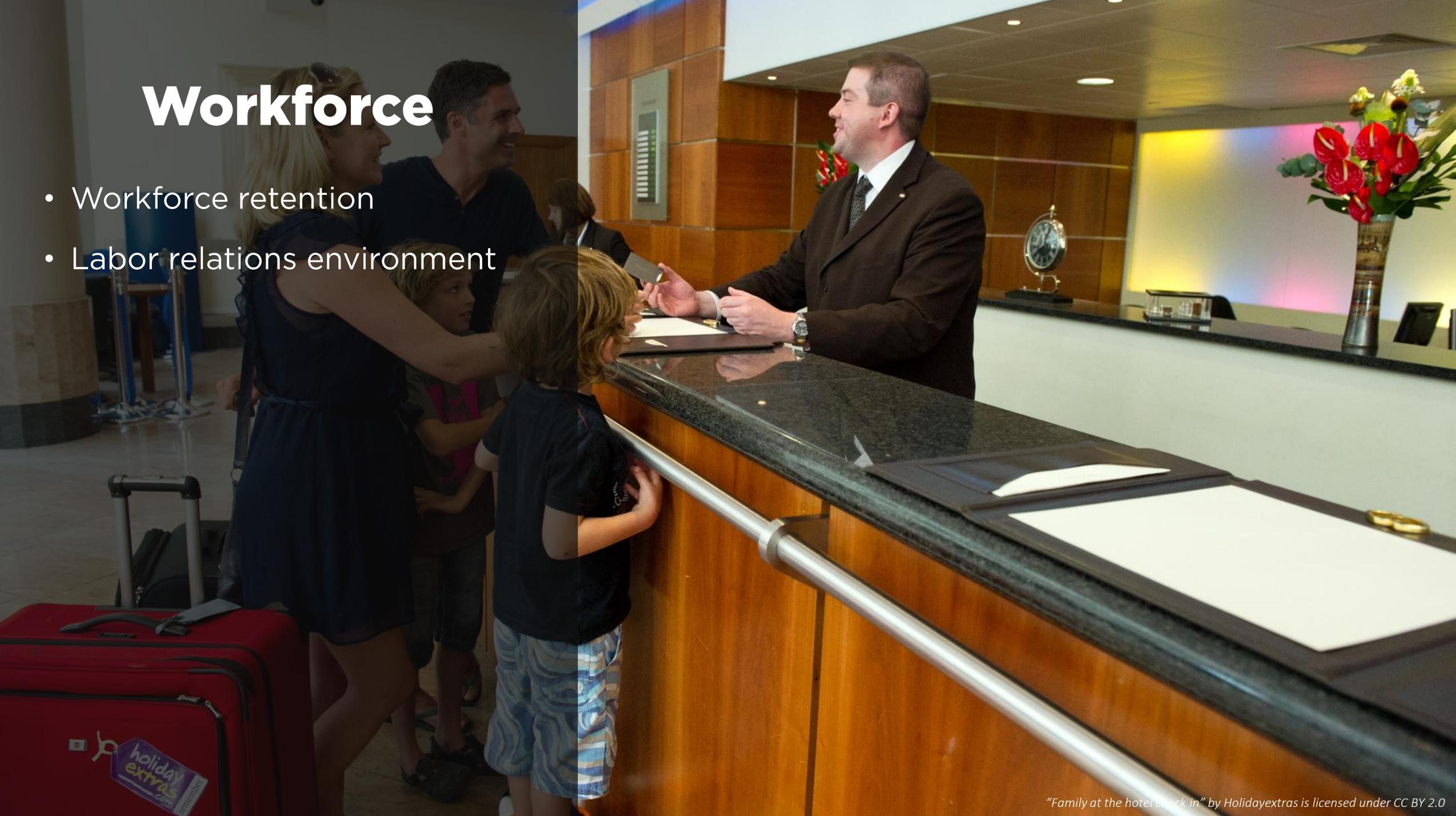
	Relative Importance
	Funding Support & Certainty 1 st
	Industry Support 2 nd
	Effective Destination Organization Governance Model 3 rd
	Local Community Support 4 th

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



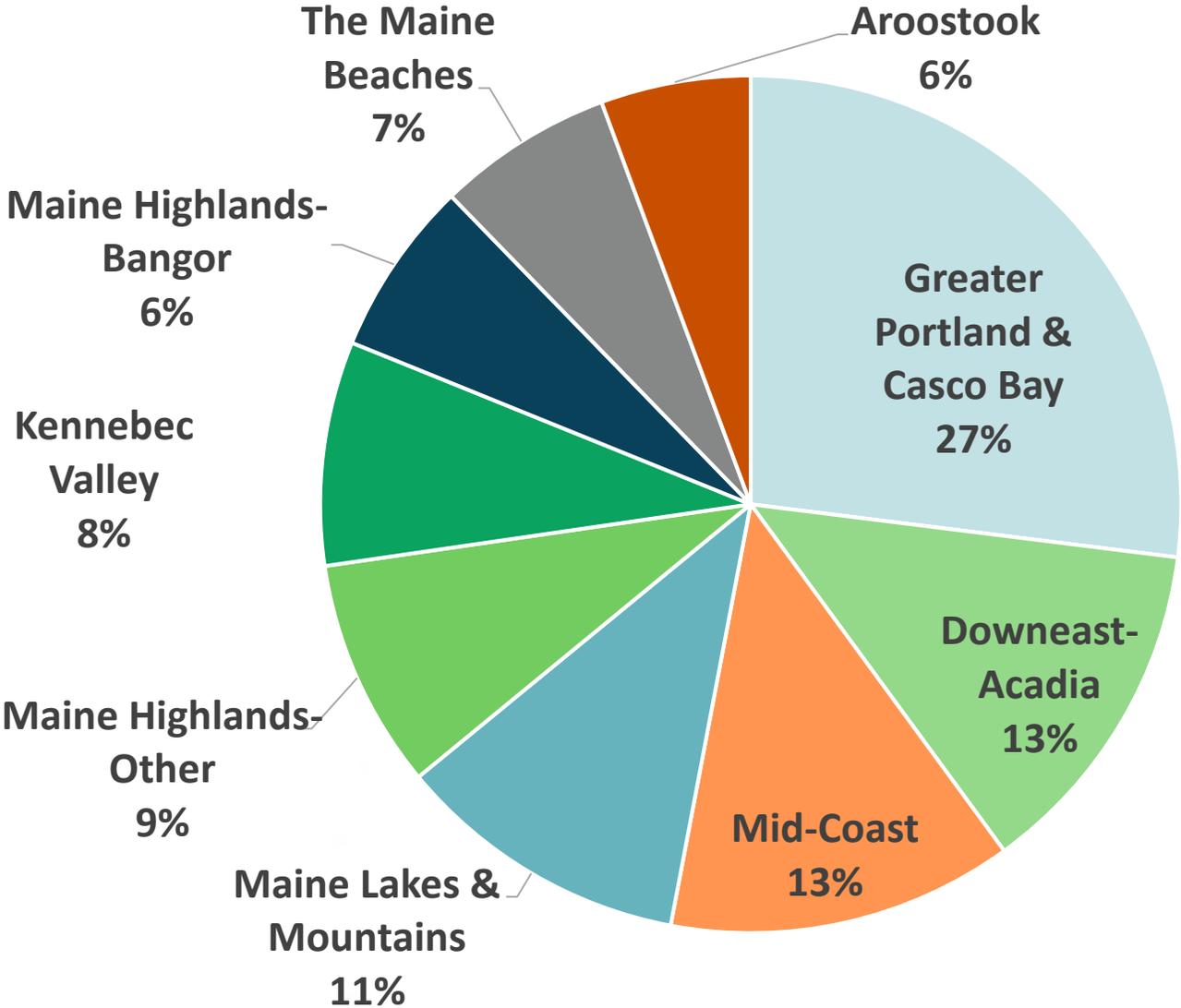
DESTINATION NEXT

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

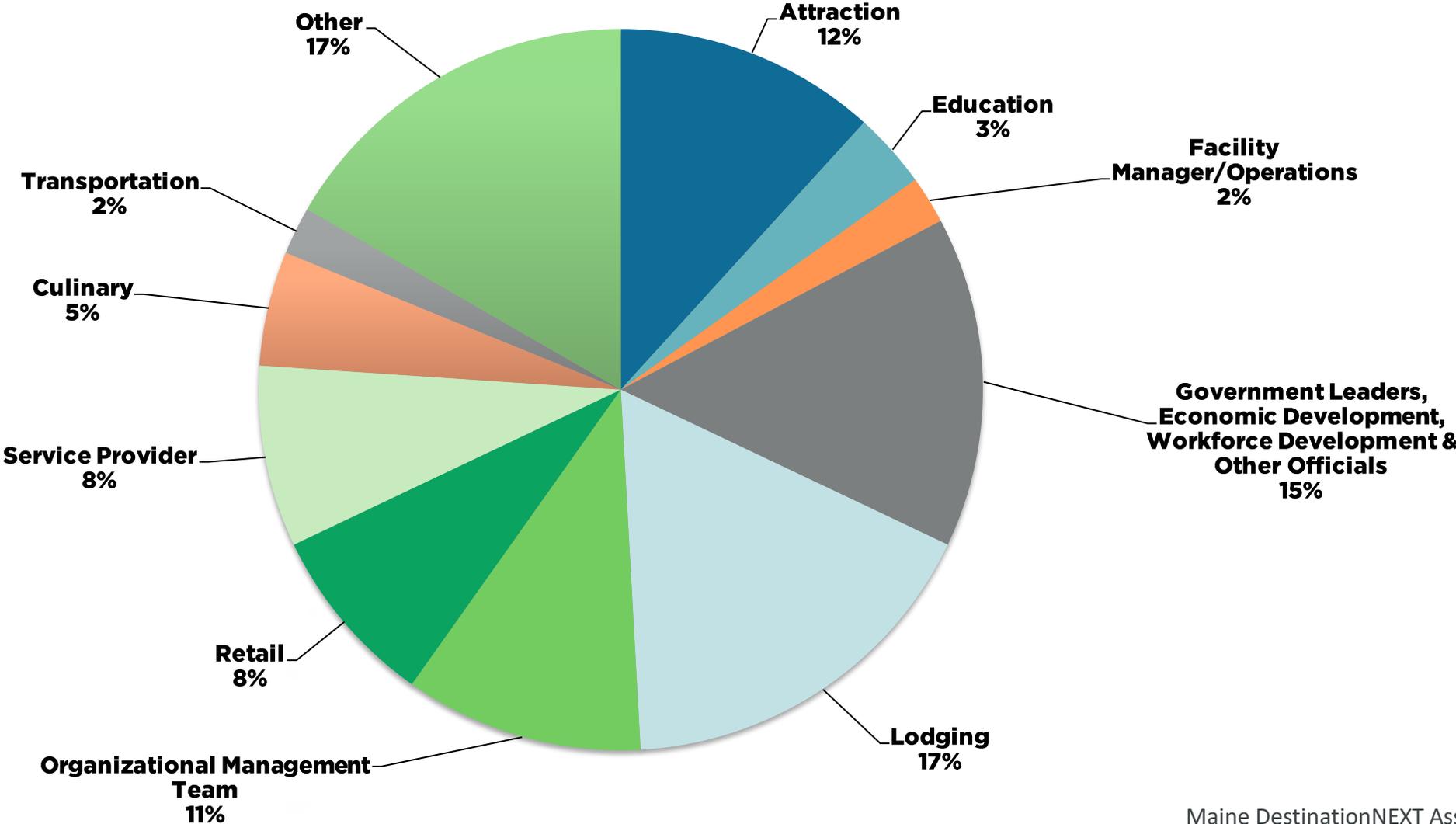
March 29, 2018



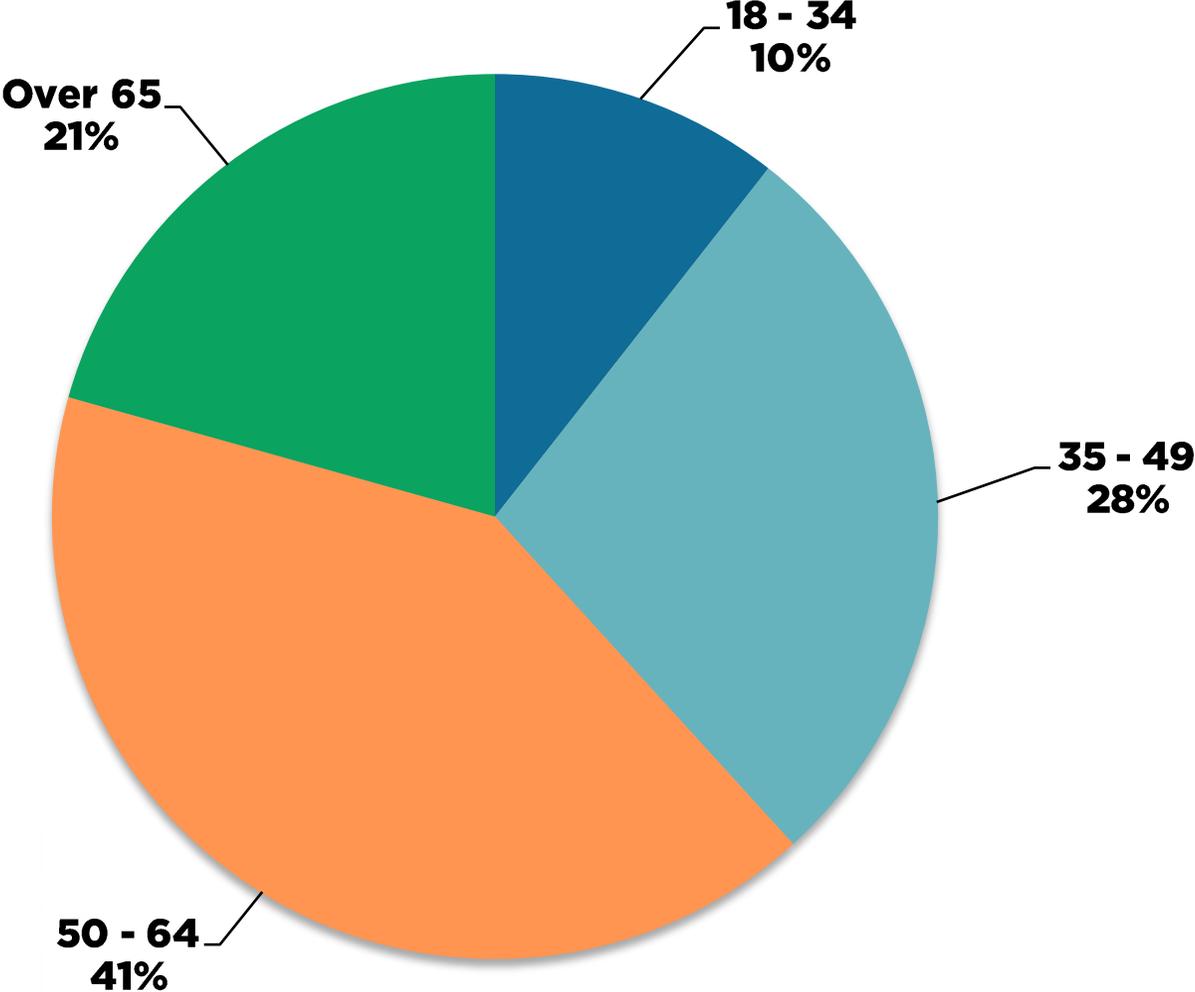
1,033 Responses - by Region



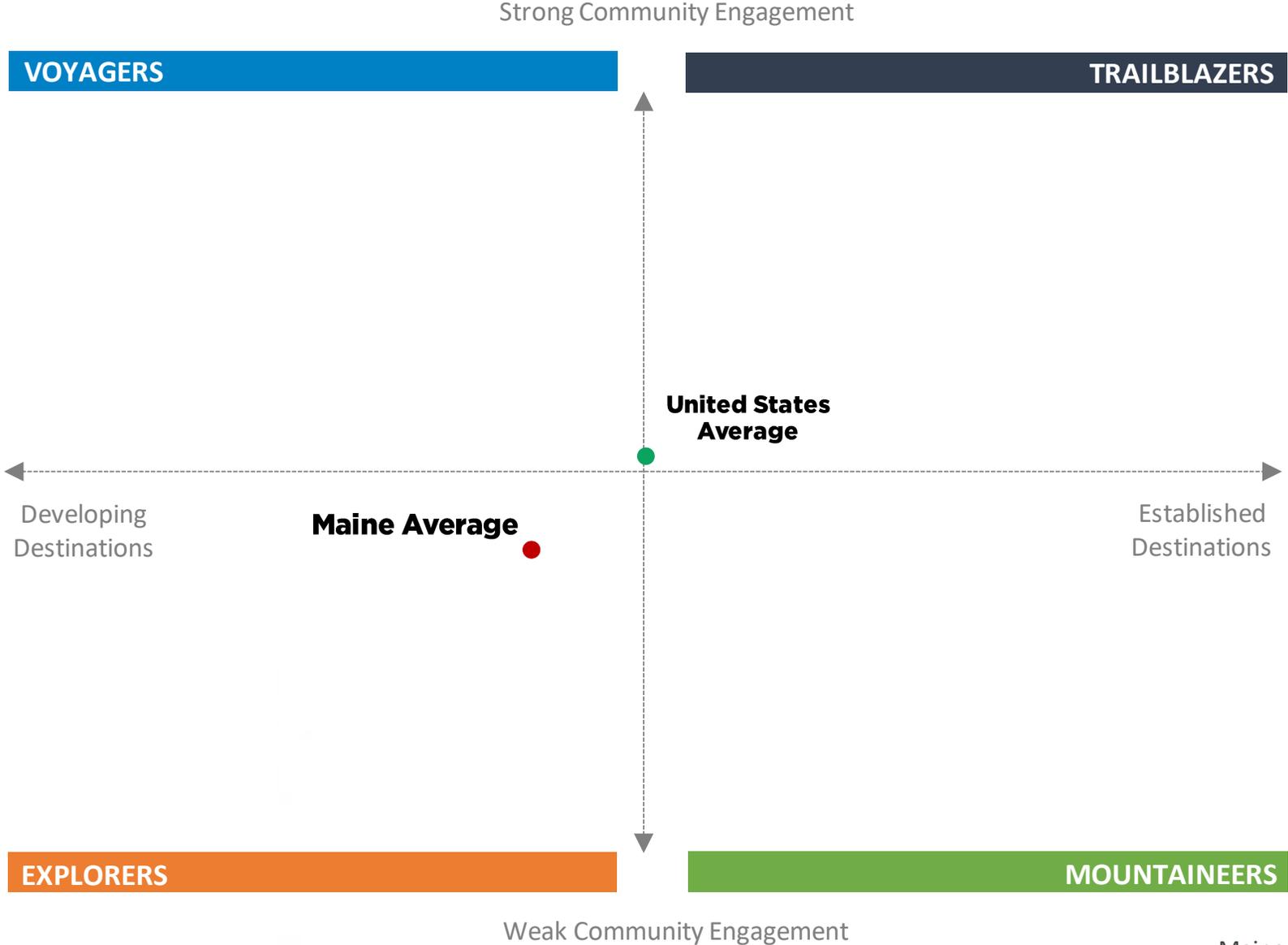
1,033 Responses – By Stakeholder



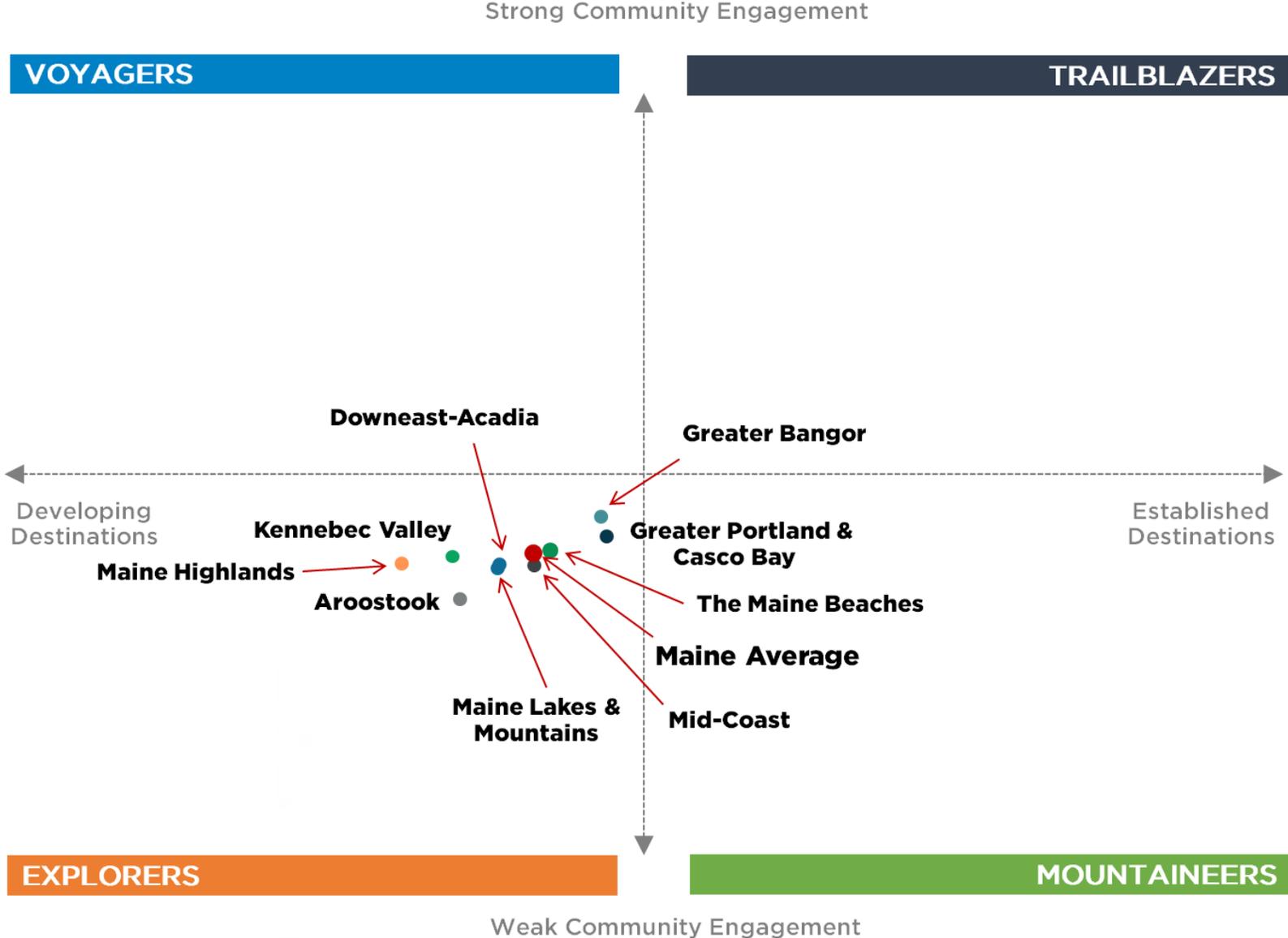
Age Demographic



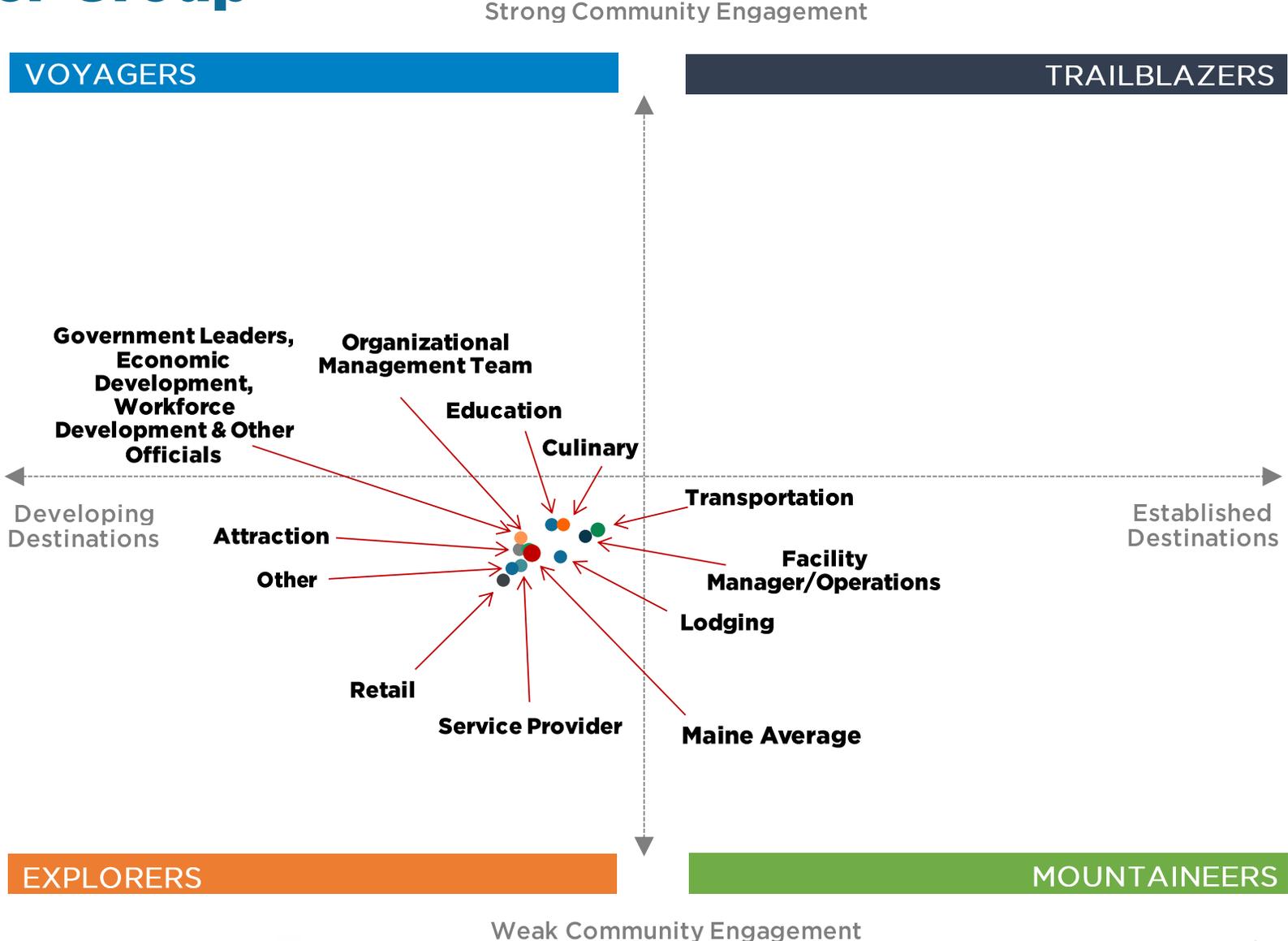
State of Maine Overall Assessment - Industry



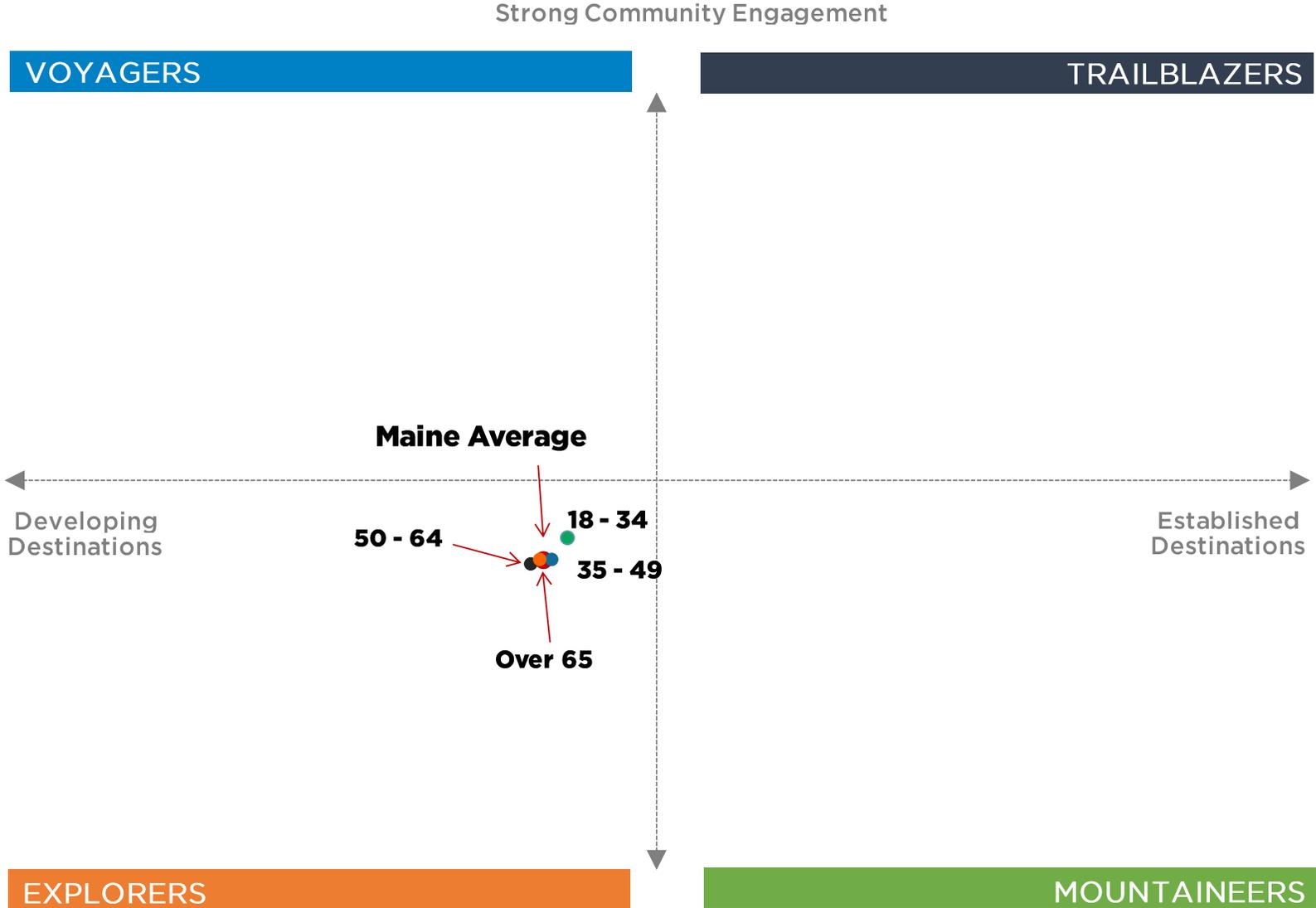
State of Maine Overall Assessment – Regions



State of Maine Overall Assessment – Stakeholder Group



State of Maine Overall Assessment – Age



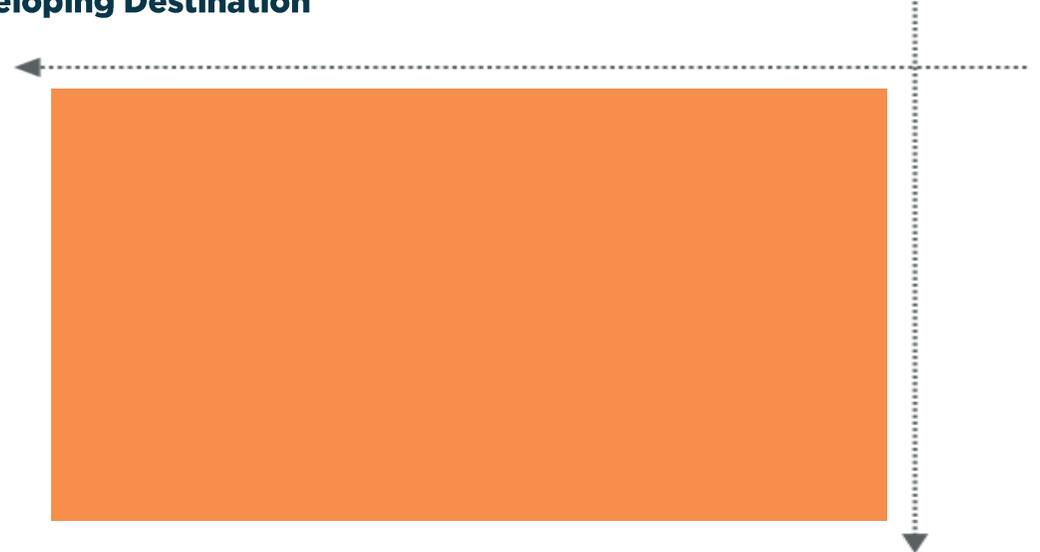
Explorers

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

Key Strategic Challenges

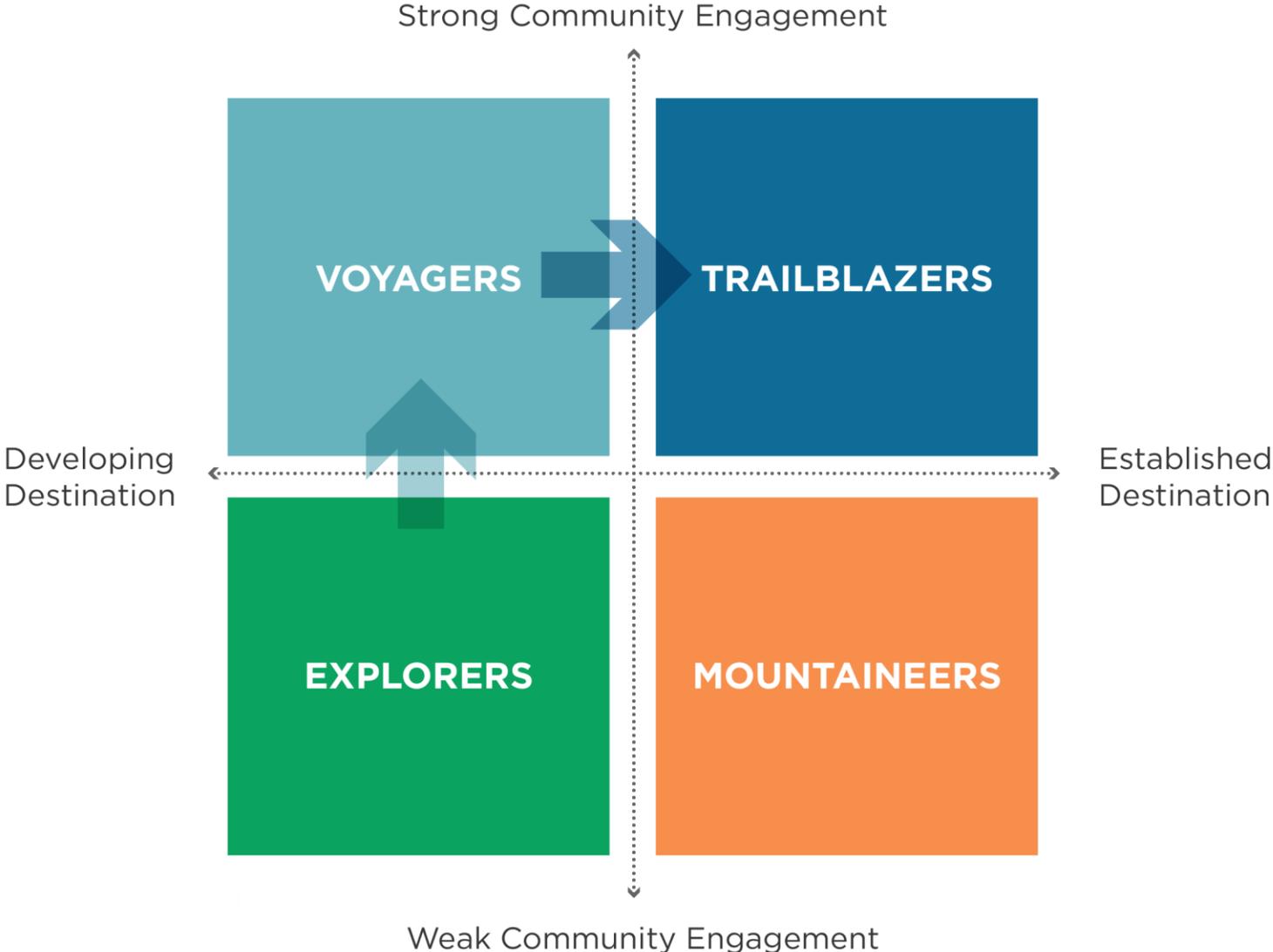
- **Rallying the community to work together towards a realistic vision and strategy**
- **Building community recognition and acceptance that transformational change is needed**
- **Implementing the strategy with limited resources**

Developing Destination

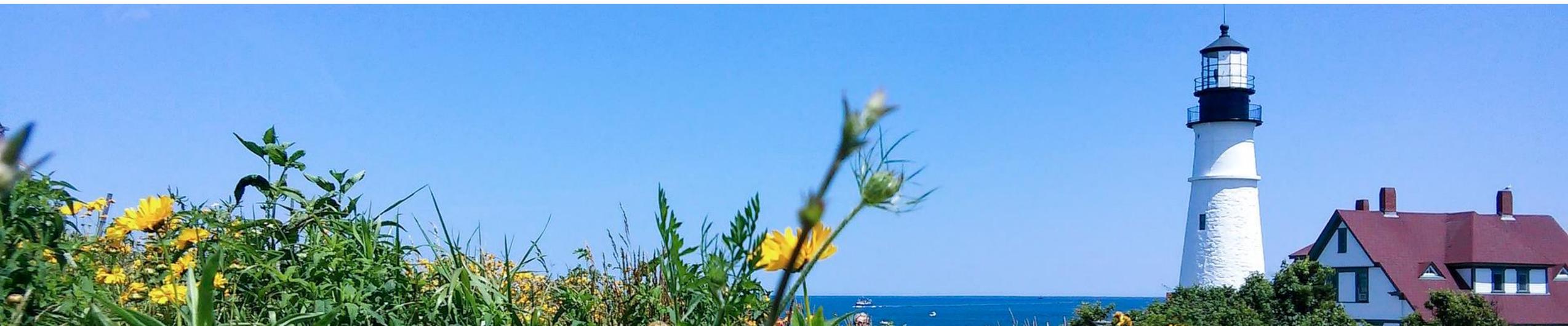


Weak Community Engagement

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

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

RESULTING SCENARIO EXPLORERS

Note

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

Community Support & Engagement - Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
Local Community Support	3.44	3.15	3.47	3.49	3.31	3.35	3.65	3.34	3.45	3.56
Industry Support	3.50	3.21	3.51	3.56	3.44	3.60	3.58	3.50	3.46	3.41
Hospitality Culture	3.42	3.63	3.28	3.61	3.17	3.02	3.62	3.22	3.47	3.35
Regional Cooperation	3.38	2.98	3.31	3.50	3.27	3.37	3.45	3.16	3.40	3.68
Economic Development	4.00	3.63	3.94	4.11	4.00	3.96	4.11	3.89	3.96	4.08
Workforce	2.39	2.77	2.18	2.40	2.56	2.52	2.75	2.44	2.05	2.10
Effective Advocacy Program	3.22	2.96	3.28	3.29	3.21	3.05	3.43	3.21	3.09	3.21
Membership Strength & Support	3.34	2.84	3.38	3.41	3.43	3.44	3.52	3.30	3.23	3.23
Funding Support & Certainty	2.50	2.01	2.30	2.68	2.43	2.33	2.58	2.36	2.45	2.99
Effective DMO Governance Model	3.22	2.73	3.11	3.31	3.31	3.17	3.62	3.18	3.21	3.01
COMMUNITY SUPPORT & ENGAGEMENT - Maine Average										3.25
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT										3.60

RESULTING SCENARIO

EXPLORERS

Note

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

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

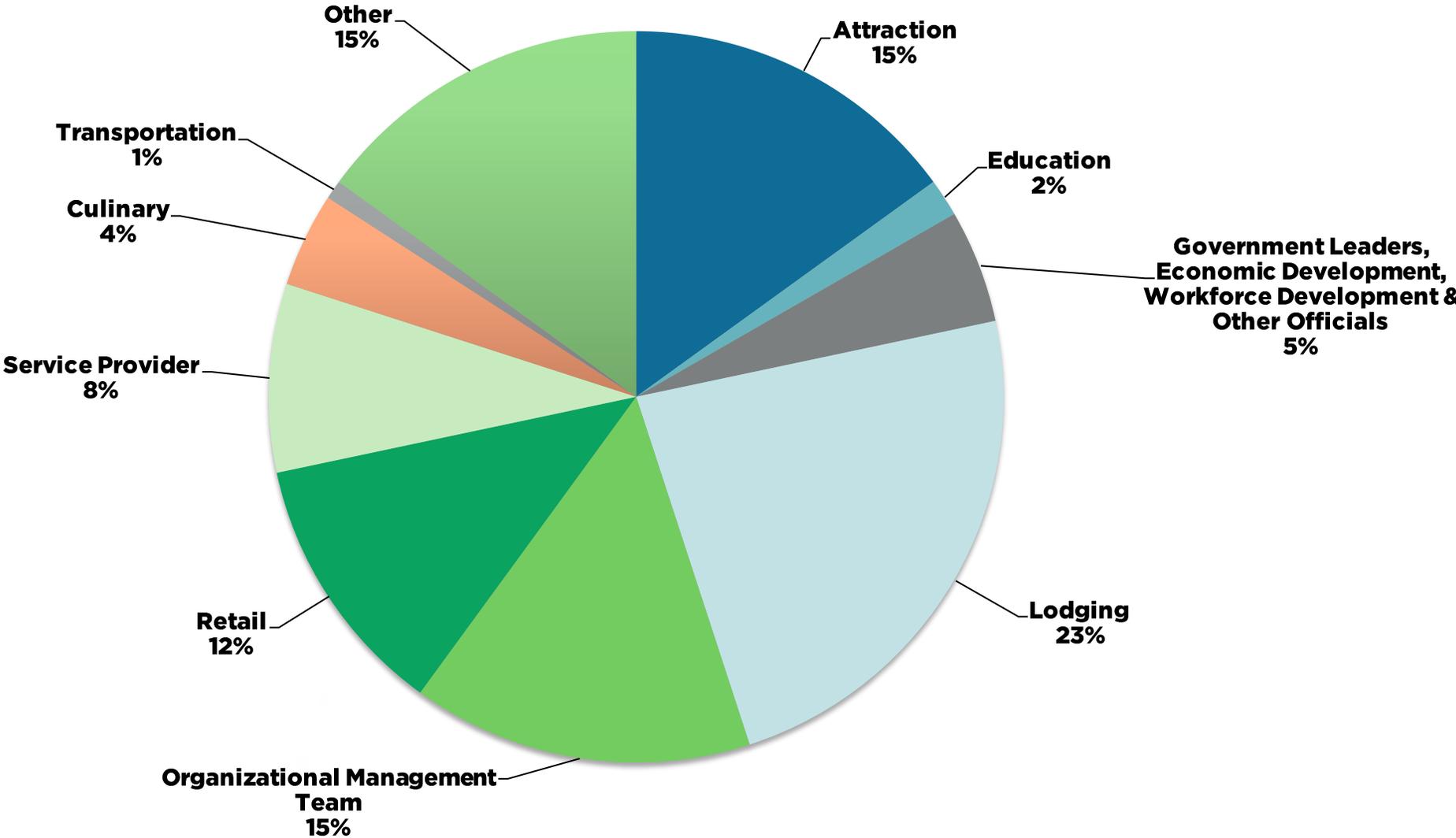
Multi-User Online Diagnostic
Tool Results:

State of Maine Assessment -
Mid-Coast

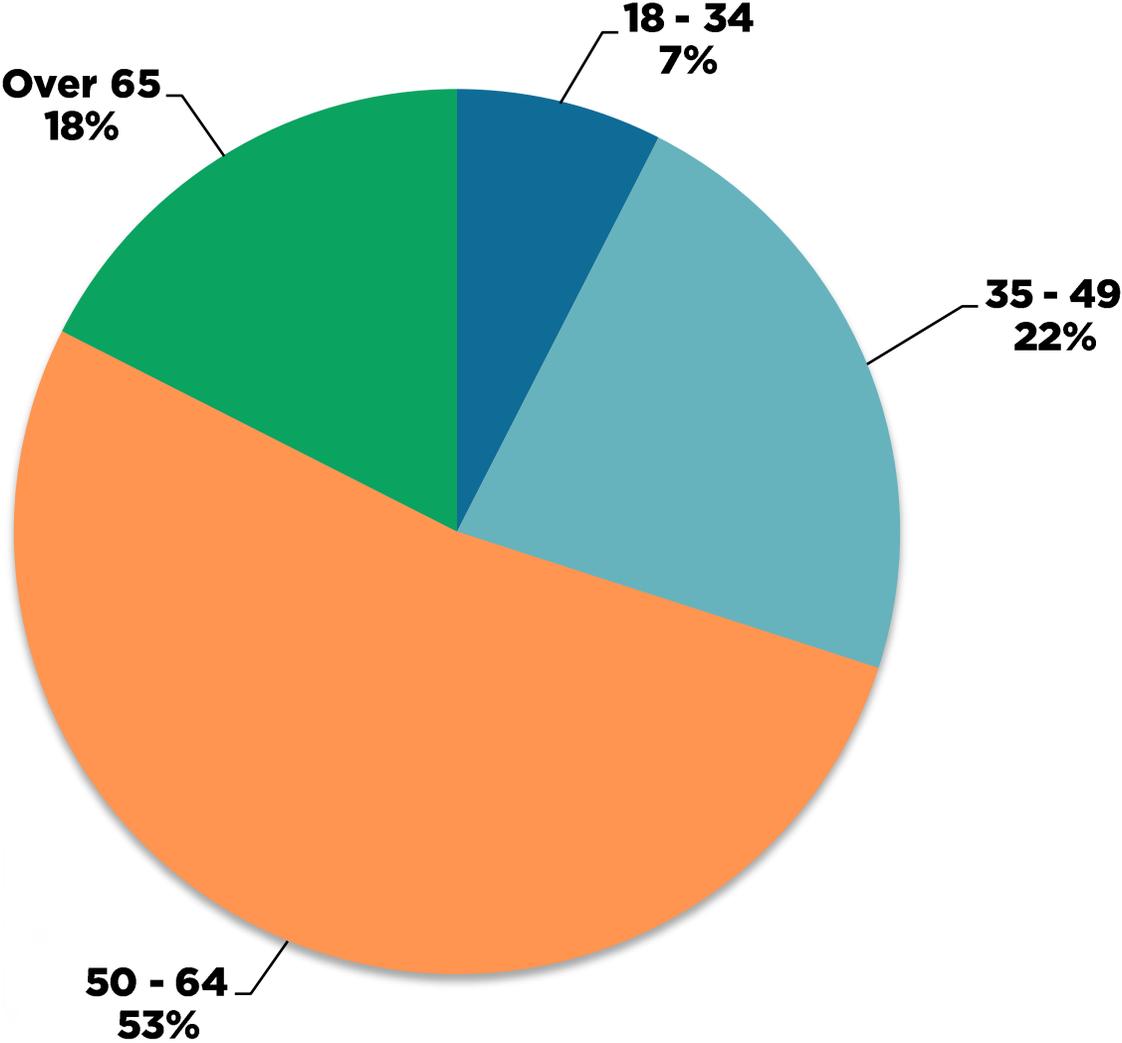
June 6, 2018



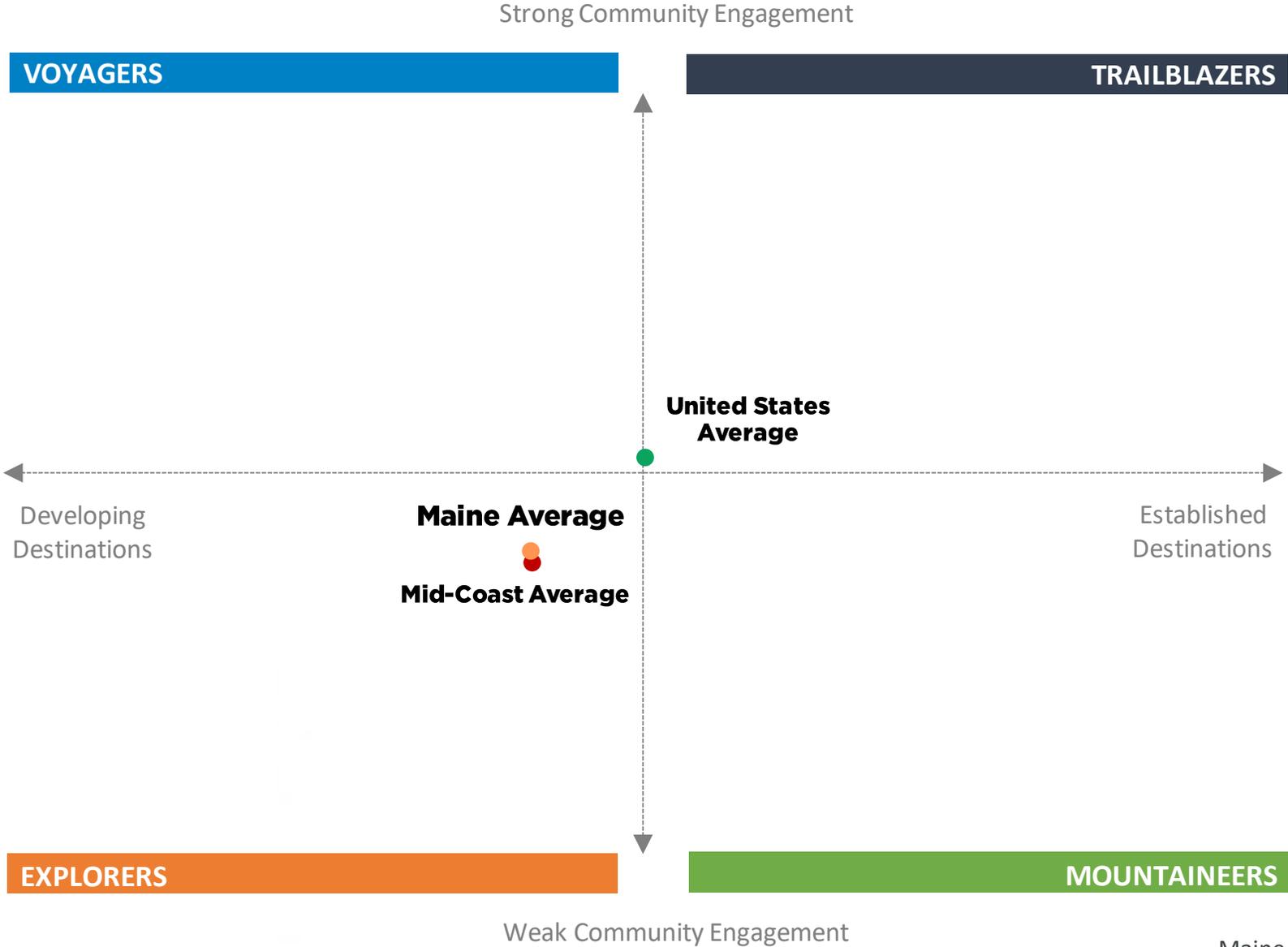
120 Responses



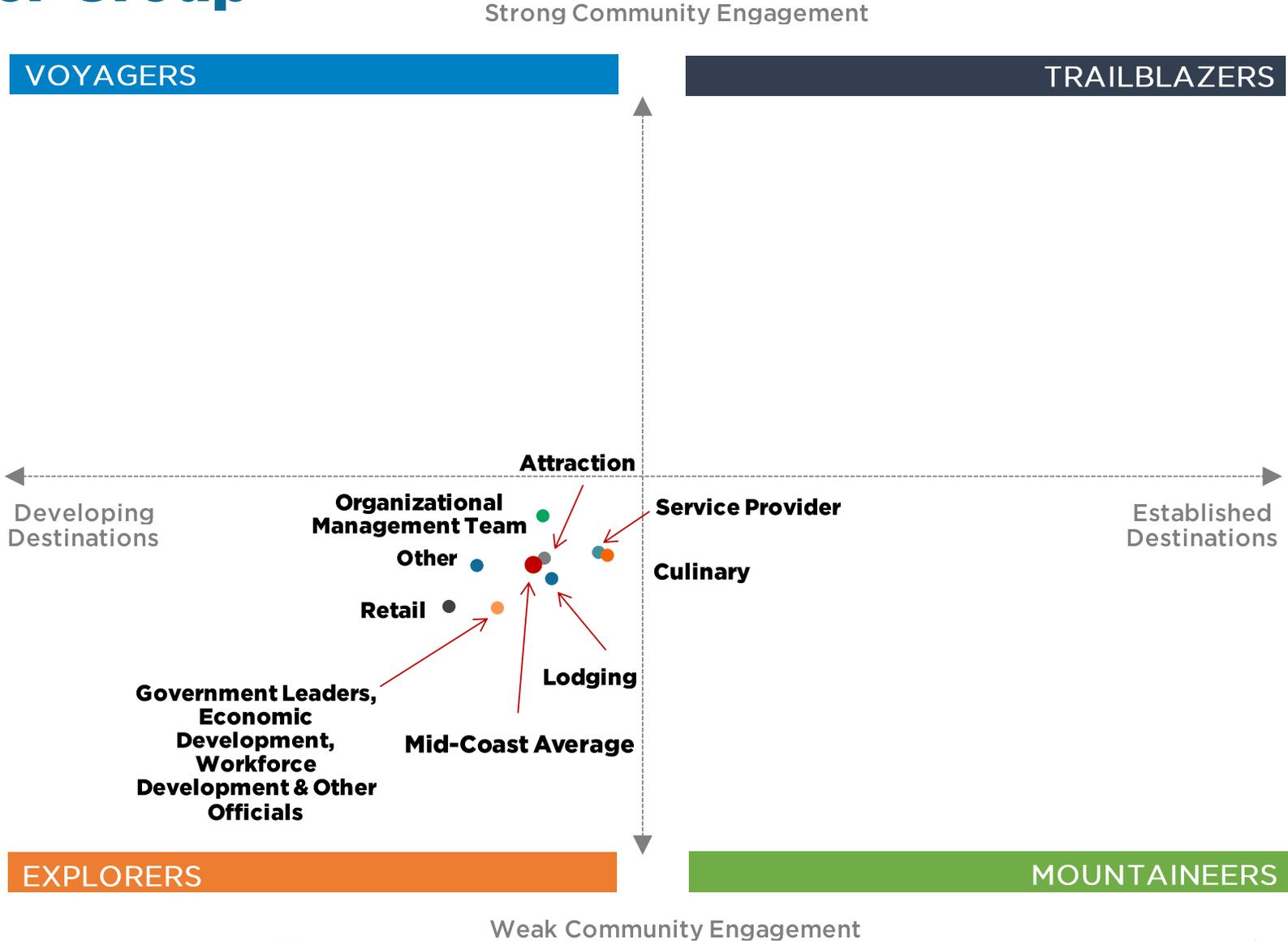
Age Demographic



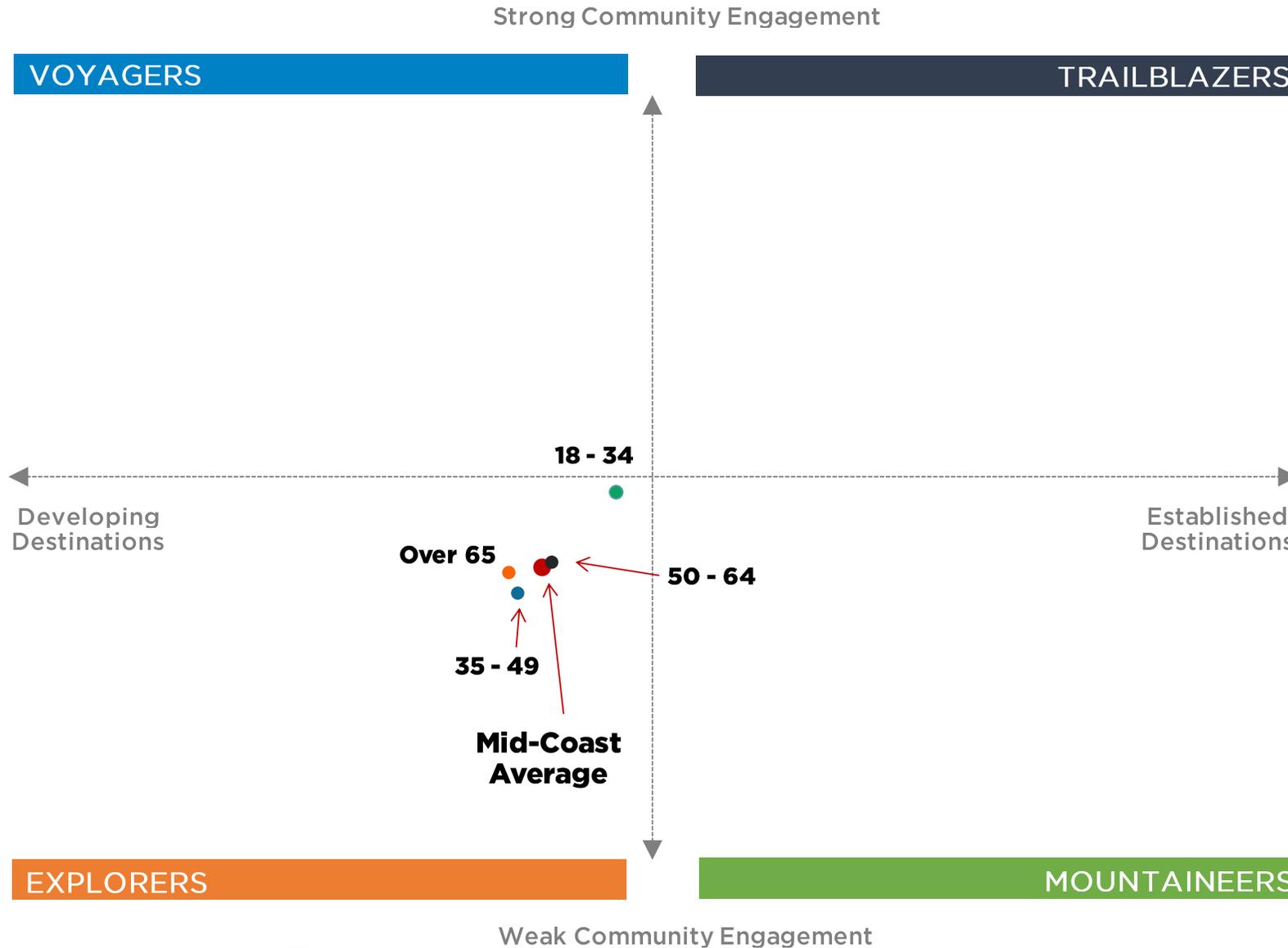
Mid-Coast Overall Assessment - Industry



Mid-Coast Overall Assessment - Stakeholder Group

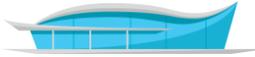


Mid-Coast Overall Assessment - Age



Destination Strength Rankings – Mid-Coast



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

Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Mid-Coast Average	Standard Deviation	Industry Average	Mid-Coast Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.5%	1%	3.11	2.70	0.74
Accommodation	10.5%	11.1%	2%	3.54	3.14	0.62
Mobility & Access	10.1%	11.0%	2%	3.12	2.63	0.61
Attractions & Entertainment	10.8%	10.9%	1%	3.65	3.83	0.64
Destination Performance	10.0%	10.5%	1%	3.88	3.13	0.66
Sports & Recreation Facilities	9.4%	10.1%	2%	3.29	2.91	0.66
Brand	10.5%	9.9%	2%	3.49	3.41	0.54
Events	9.7%	8.8%	2%	3.63	3.34	0.68
Communication & Internet Infrastructure	10.1%	8.2%	2%	3.39	2.68	0.85
Air Access	9.2%	8.0%	2%	3.16	3.20	0.48

DESTINATION STRENGTH - Mid-Coast 3.09

INDUSTRY AVERAGE DESTINATION STRENGTH 3.49

RESULTING SCENARIO

EXPLORERS

Note

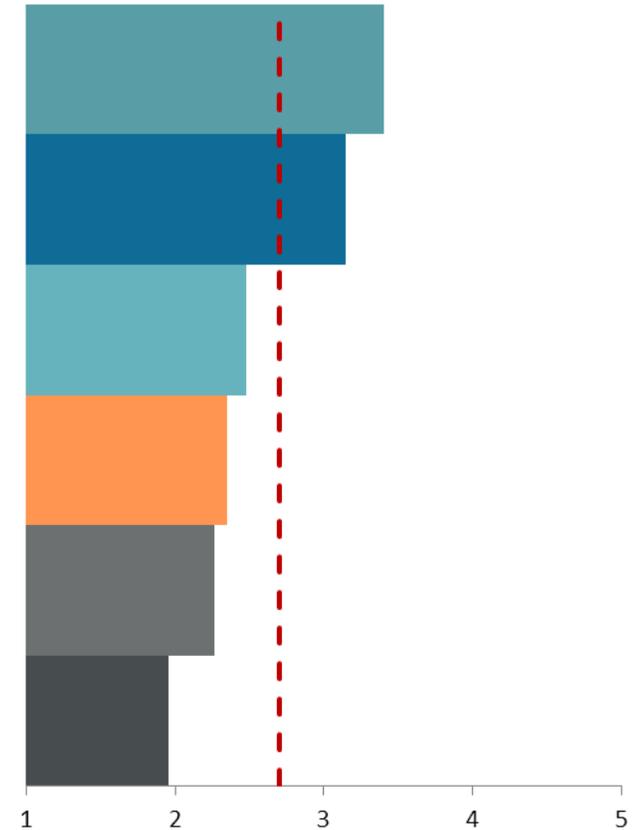
Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

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

Convention & Meeting Facilities

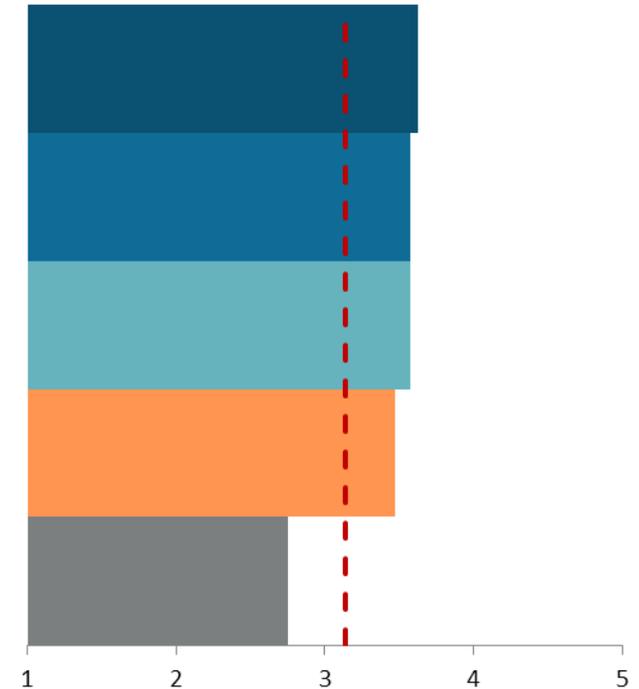
- Where possible, hotels/other meeting venues take full advantage of the views
- Has good, unique off-site venues for special events
- Offers an abundance of professional and experienced convention and/or meeting services suppliers
- Has the necessary convention, meeting, and trade show facilities to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

Accommodation

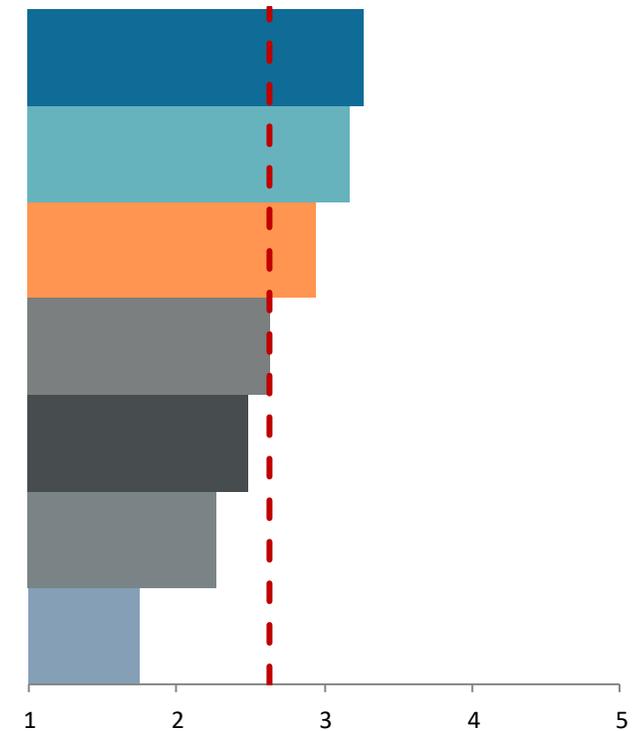
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate hotel accommodations capacity
- Offers a diversity of accommodation price options
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Has a healthy presence of well-known brand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



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

Mobility & Access

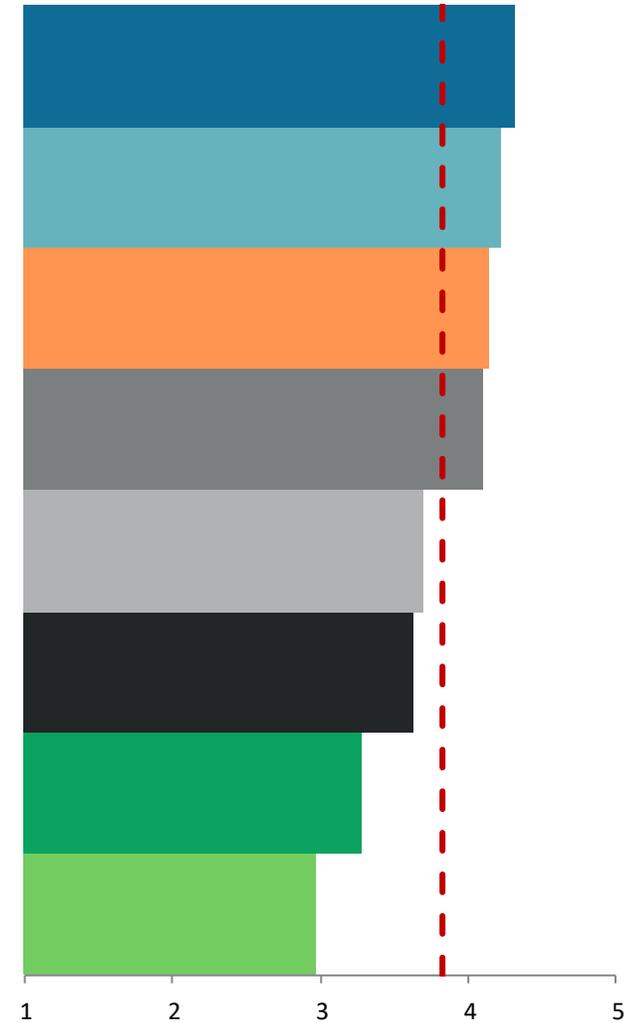
- Has adequate water access that makes it easy for visitors to get around
- There are a number of sufficient and visible information centers available to tourists
- Has great directional signage and highways that make it easy to get around
- Provides good access and mobility for those with disabilities
- Has adequate bike paths/pedestrian walkways that makes it easy for visitors to get around
- 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.

Attractions & Entertainment

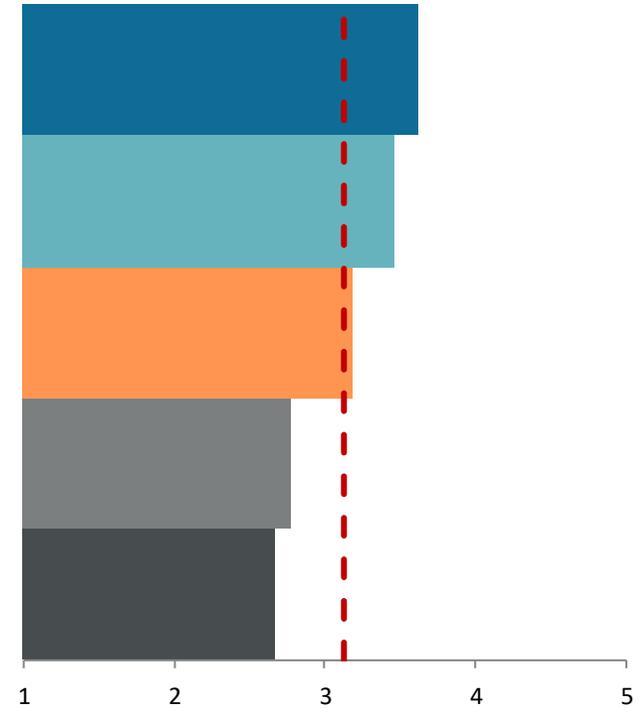
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has high-quality and wide-ranging arts and cultural attractions
- Has unique and high-quality dining options
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic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



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

Destination Performance

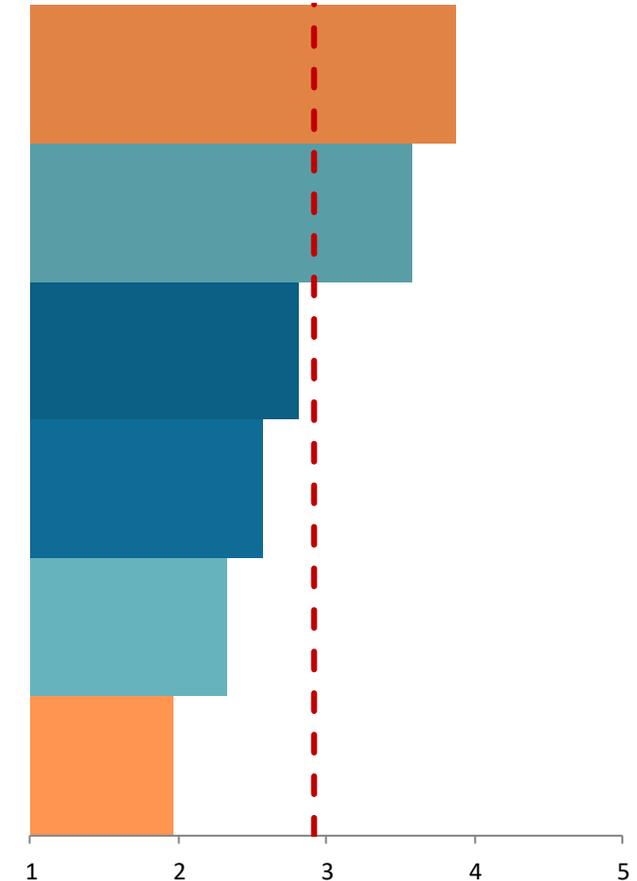
- Is experiencing a positive growth in overnight visitation
- Hotels are performing well (e.g. Occupancy, RevPAR)
- Tourism industry performance is adequately measured and tracked
- The tourism industry does a good job at communicating the performance and economic impact to the public
- Is successfully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



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

Sports & Recreation Facilities

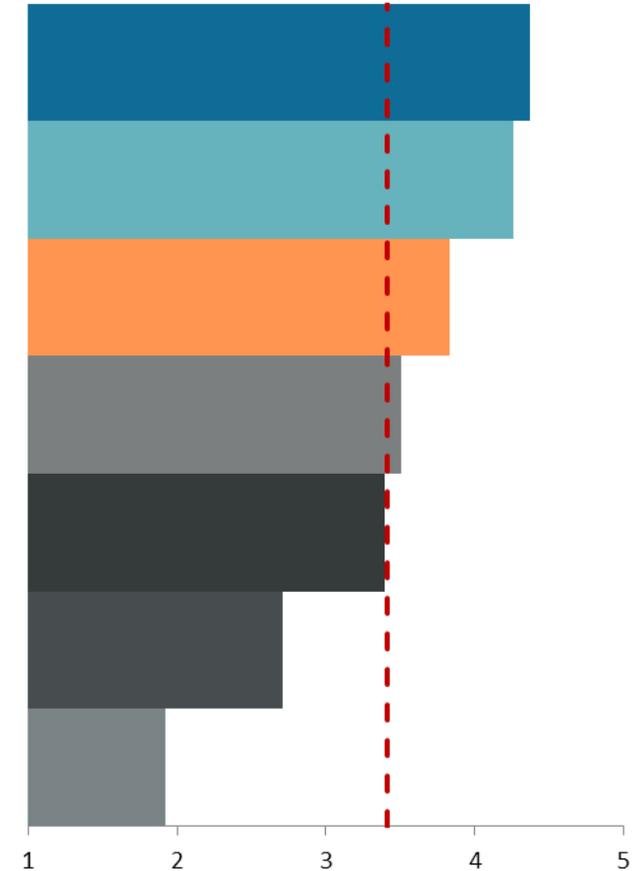
- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- The Maine Sports Commission is a useful resource and is properly utilized throughout the region
- Leadership representing sports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



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

Brand

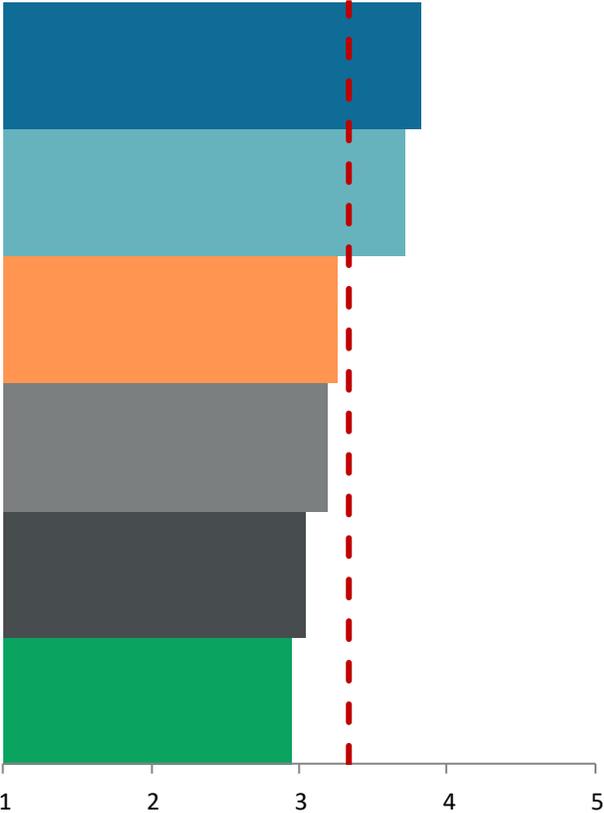
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for having a lot of things to see and do
- Is known for being environmentally conscious and sustainable
- Appeals to a diverse range of visitors
- Has an effective region-wide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



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

Events

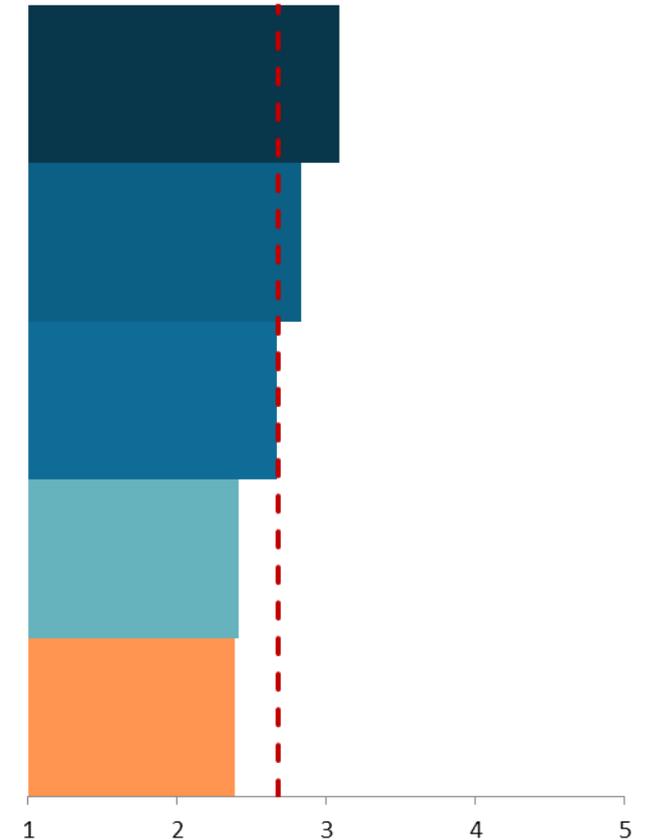
- Has an abundance of parks and outdoor spaces for handling special events
- Offers major events that attract non-local visitors
- Local venues produce numerous public/lifestyle shows throughout the year for residents to enjoy
- Government is cooperative and supportive in attracting and hosting major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



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

Communication & Internet Infrastructure

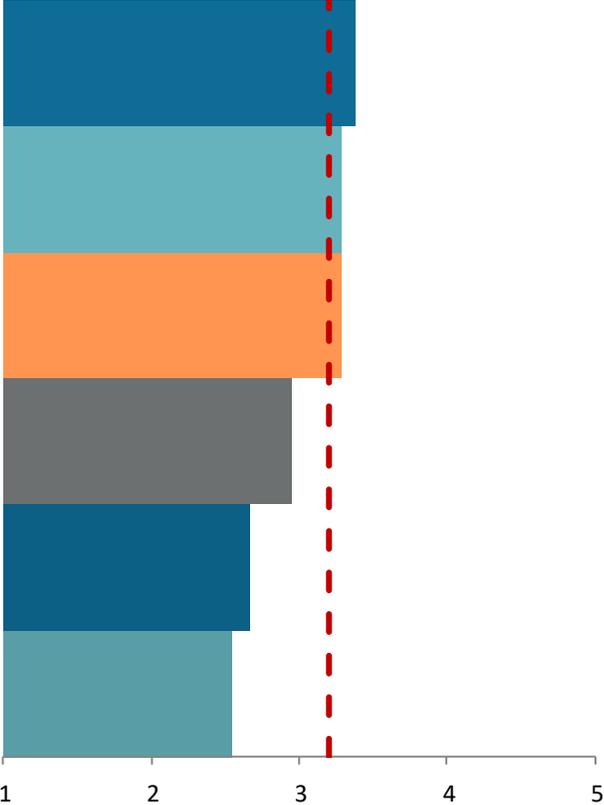
- Tourism industry uses and leverages social media to support the brand and market
- There is substantial Wi-Fi access in region’s meeting/convention facilities
- Businesses have access to good broadband capacity to be able to run their businesses effectively
- Offers sufficient free Wi-Fi in outdoor/public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



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

Air Access

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



Relative Importance

Perceived Performance



Hospitality Culture

1st

2nd



Local Community Support

2nd

4th



Regional Cooperation

3rd

5th



Industry Support

4th

3rd

Community Support & Engagement - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Mid-Coast Average	Standard Deviation	Industry Average	Mid-Coast Average	Standard Deviation
Hospitality Culture	10.2%	10.4%	1%	3.71	3.47	0.93
Local Community Support	10.2%	10.3%	1%	3.56	3.45	0.79
Regional Cooperation	10.0%	10.2%	2%	3.76	3.40	0.93
Industry Support	9.9%	10.2%	1%	3.81	3.46	0.84
Economic Development	10.2%	10.2%	1%	3.95	3.96	0.62
Workforce	10.1%	10.1%	2%	3.31	2.05	0.72
Effective Advocacy Program	10.2%	9.9%	1%	3.63	3.09	0.81
Membership Strength & Support	9.6%	9.9%	2%	3.76	3.23	0.82
Funding Support & Certainty	9.9%	9.6%	1%	3.36	2.45	0.71
Effective DMO Governance Model	9.6%	9.4%	1%	3.80	3.21	0.92

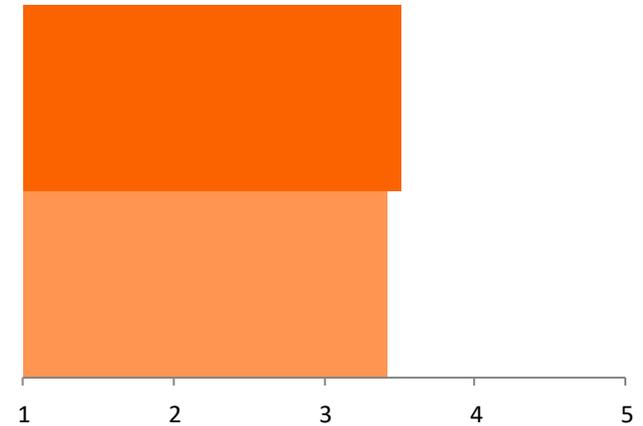
COMMUNITY SUPPORT & ENGAGEMENT - Mid-Coast	3.18
INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT	3.60

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.

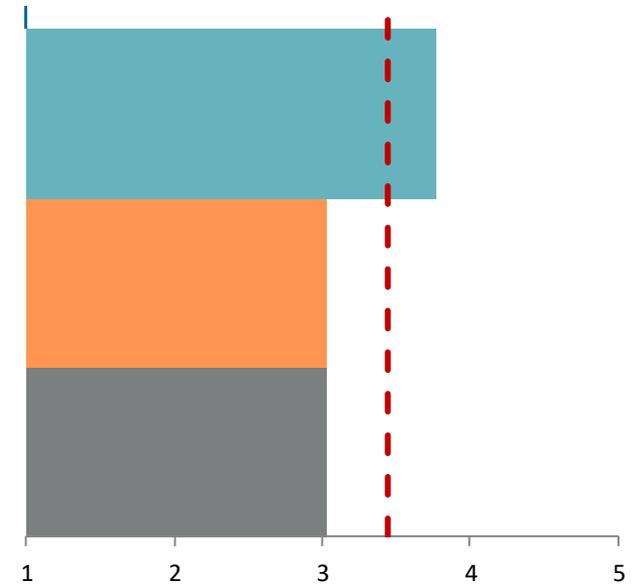
Hospitality Culture

- 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



Local Community Support

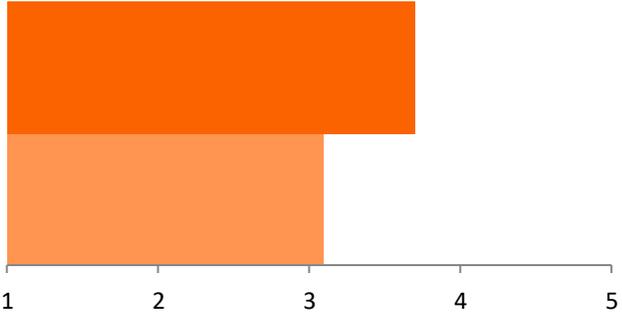
- The region's tourism industry has business support
- The region's tourism industry gets positive media coverage
- Stakeholders find value in partnerships that include other tourism regions



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

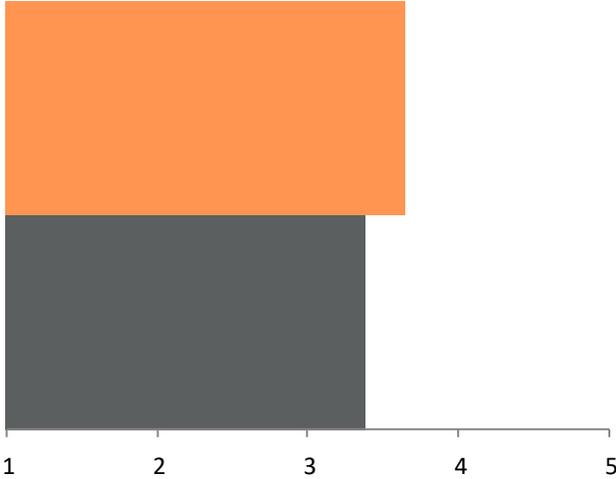
Regional Cooperation

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



Industry Support

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



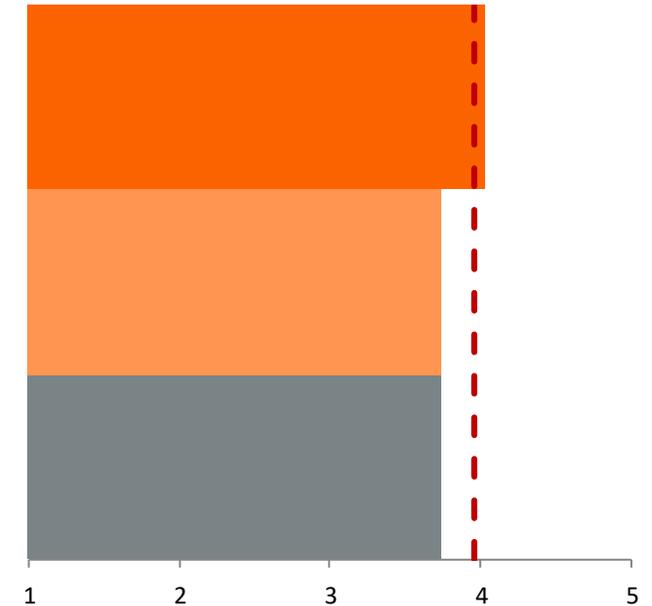
Note
Red Dashed Line signifies the destination average for this individual variable.

Economic Development

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

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

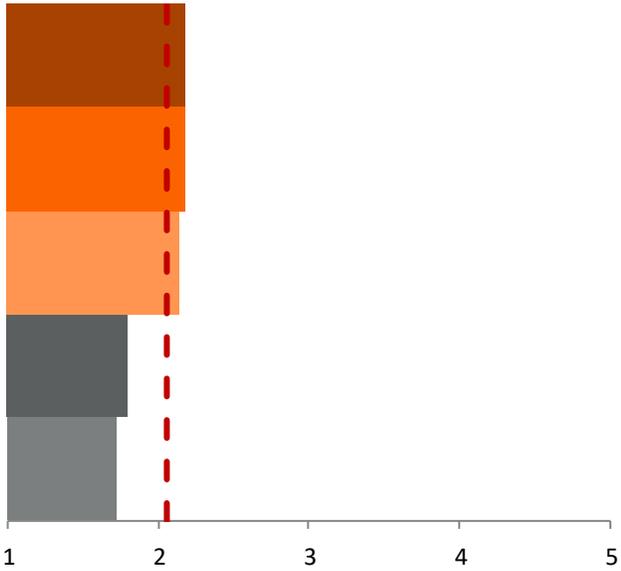
- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and business development



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

Workforce

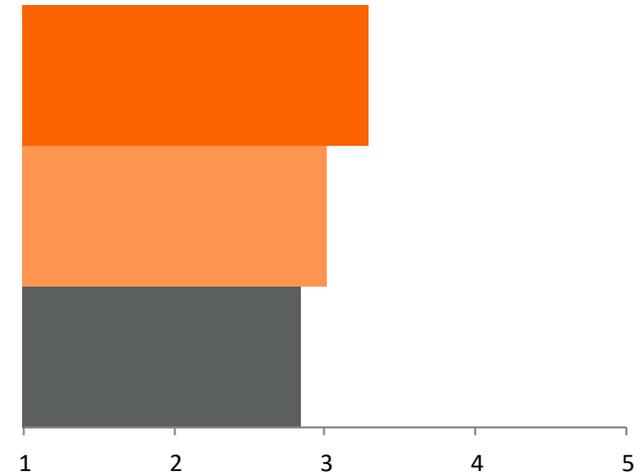
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The region’s workforce is stable and has a positive labor relations environment
- The region has a strong base of hospitality education programs
- The increase in rents and home prices has not affected the industry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



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

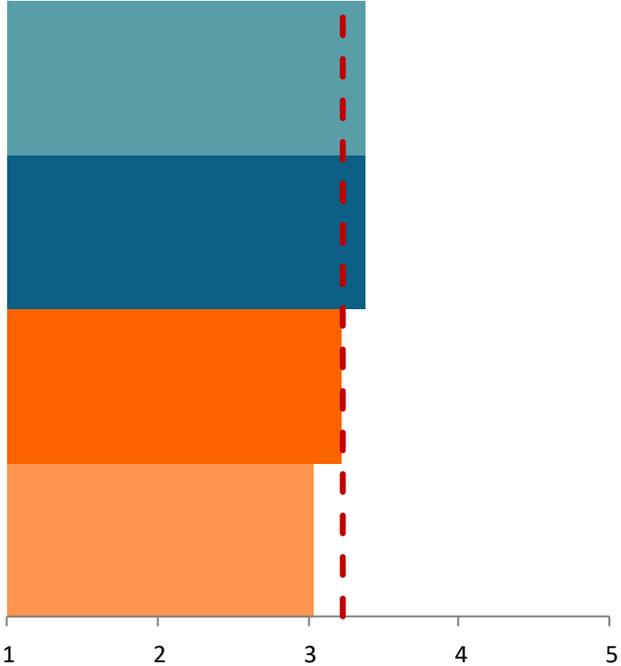
Effective Advocacy Program

- 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

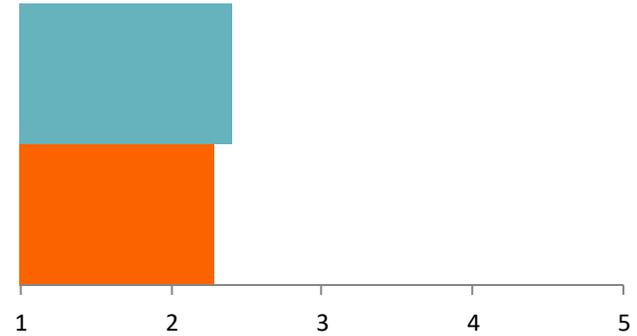
- Stakeholders are active, engaged and supportive of tourism marketing
- Stakeholders are active, engaged and supportive of tourism development
- Stakeholders find value in region-wide partnerships
- Stakeholders find value in partnerships that include other tourism regions



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

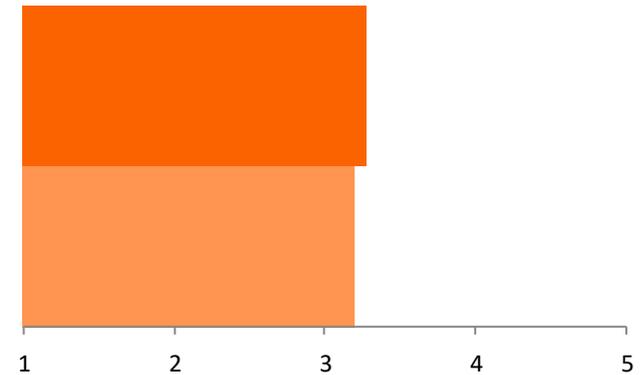
Funding Support & Certainty

- 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 Destination Organization Governance Model

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



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**
- **Iconic attraction**
- **Headquarter & branded hotels**
- **Public transportation**
- **Communicating the importance of tourism to the public**
- **Sporting venues and fields**
- **Region-wide marketing**
- **Wi-Fi & cell coverage**



Community Support & Engagement Opportunities

- **Local community support & partnerships**
- **Funding**
- **Workforce**
 - **Hospitality education**
 - **Home prices**
 - **Stable workforce & labor relations**
- **Advocacy**

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

Advertising, Marketing, PR & Branding (30%)

- Adding video content to regional websites and social media sites related to targeted visitor search inquiries
- Additional investment to promote the region for the months between November through April. Despite the fact that there are more events going on in those months up here, a number of restaurants for example are choosing or having to close for the winter or a couple of months because they don't have enough patrons.
- Having unified advertising/public relations! If museums, attractions, businesses, etc. would join together to promote themselves (not just rely on their Chamber of Commerce to do it) the Mid-coast would really benefit.

Transportation Infrastructure (27%)

- A better transportation infrastructure, that includes, better road networks that ease congestion and secondary transportation to move mass amounts of people. If Maine wants more people to visit, we need to provide a more direct way for those to travel there
- Signage is a significant obstacle for visitors -- the peninsulas provide great opportunities for additional visitors but they're often hidden or difficult to find because they're off the beaten path
- Public transportation. Not just for visitors but for workers who can no longer afford to live where their jobs are
- Increased non-stop airline flights to Bangor and Portland
- Improve Transportation options; Amtrak to Rockland; Better roads; Intermodal facilities

Visitor Amenities & Experiential Product Development (13%)

- Better, more accessible information that helps visitors discover cultural heritage more easily, and provide transportation options for visiting sites
- Holding special events, examples music, educational tours, fishing derbies, mountain biking etc.
- More lodging & hotels that people can afford
- More attention to the rehabilitation and preservation of historic structures throughout Maine
- Protect our natural resources. The roads are getting noisier and the night sky more brightly lit...guests come to get away from this sort of pollution

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

Workforce & Housing Availability (13%)

- **Childcare programs that help more people go to work**
- **It would be good to have fewer short term rentals like Airbnb and more low cost housing so that employees have somewhere to live**
- **Somehow we need to be able to raise prices so that there is more cash in the system. More of our employment needs to pay better**
- **Need larger labor pool**
- **More affordable housing for those who work in the hospitality and tourism industry**
- **Access to visa workers**

Branding, Advertising & Marketing (12%)

- **Bundling experiences with others**
- **Linking the quality of place life balance with work opportunities (start-ups, telecommuting, etc.)**
- **Updated media presence to showcase Maine as trendy**
- **Maine already has a reputation as old and quaint so promote this**
- **Expanding PR investment**
- **Increased Exposure of Destination**
- **Capturing more overnight visitors**

Seasonality & Shoulder Seasons (10%)

- **Creating more year round reasons to visit**
- **Drive traffic in shoulder seasons**
- **Expanding the fall season as a reason to visit Maine.**
- **Focus marketing on Shoulder seasons. Everyone already comes in the summer.**
- **More visitation during November to April**
- **Increase in summer businesses**
- **Get visitors to stay longer, explore more**

What are the top tourism issues to address?

Workforce Availability & Housing (21%)

- **Basic business skills across the board**
- **Workforce development and training**
- **Finding qualified workers**
- **Lack of workforce...many innkeepers and restaurant owners have suffered from a lack of workers**
- **Lack of low income housing for service workers-they can't afford to live near enough to have a job**
- **Have adequate work staff for those businesses that support tourism**

Transportation Infrastructure (20%)

- **Adding more public transportation options (to reduce automobile congestion/parking lot congestion)**
- **Continued access to the waterfront**
- **Improve pedestrian traffic in all small towns**
- **Wiscasset Bypass is critical**
- **Parking and road infrastructure**
- **Infrastructure - importance of good roads, bridges**

Advertising, Marketing & Promotion (9%)

- **Create a coastline "passport" and market the key destinations**
- **Information access**
- **Online presence**
- **Simplify experience through more cohesive marketing and packaging of the region**
- **Encouraging visitors to "get off the beaten path."**
- **Cohesive info on area**
- **Packaged deals hotels/ museum/ restaurant/strand**

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

Culinary & Micro-Breweries/ Agritourism (26%)

- **Cider and Spirits industry, eg. Apple Cider, Scotch, Whiskey**
- **Culinary packages to try various restaurants**
- **Maine as a foodie/farm-to-table destination**
- **Foodie tours combined with B&B lodgings**
- **Food, farm and agricultural tourism**
- **Micro breweries, wineries and distillery**
- **Farms/Alternate food sources/ healthy /vegetarian food**

Nature, Wellness Eco- Tourism (12%)

- **Aquaculture**
- **Coastal Excursions**
- **eco tourism, hiking, biking etc.**
- **Green-Sustainable-Local -food, drink, stay etc.**
- **Nature/wildlife**
- **Opportunities to experience more natural beauty**
- **Retro vacation - no wireless, unwind, bingo, no tech, etc...**
- **Responsible Tourism**
- **Wellness; spas -facials, massage, etc.**

Arts, Culture & Heritage (10%)

- **Historical Tourism**
- **Art and Culture**
- **Old time music traditions/contra dances**
- **Summer theater**
- **Art galleries**
- **Approachable arts**
- **Historical: maritime history**



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!

paul.ouimet@nextfactorinc.com

