

# DESTINATION NEXT

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## Maine Statewide Assessment – The Maine Beaches

June 8, 2018

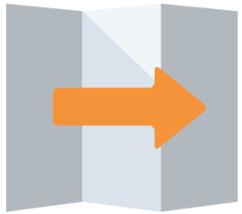


**Paul Ouimet**

# DestinationNEXT

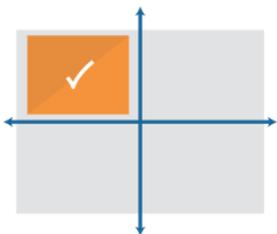
## Vision:

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



## Futures Study

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



## Scenario Model & Assessment Tool

- 4 unique scenarios
- 163 detailed assessments in 11 countries

# Maine - 8 Regional Assessments

April 10

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

April 11

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

April 12

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

April 13

- **Bangor: Maine Highlands**

October 16

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

October 17

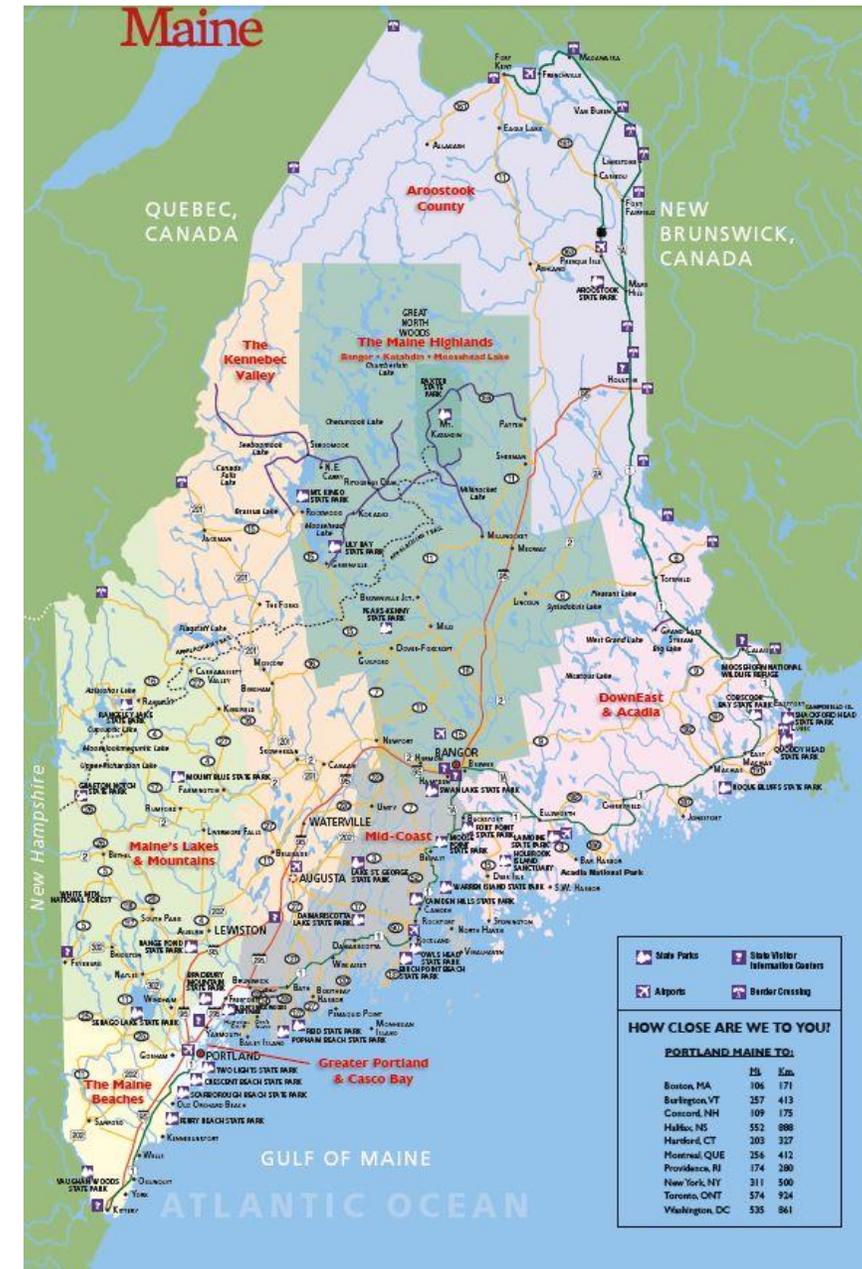
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

October 18

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

October 19

- **Biddeford: The Maine Beaches**



# Today's Objectives

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



# SCENARIO MODEL

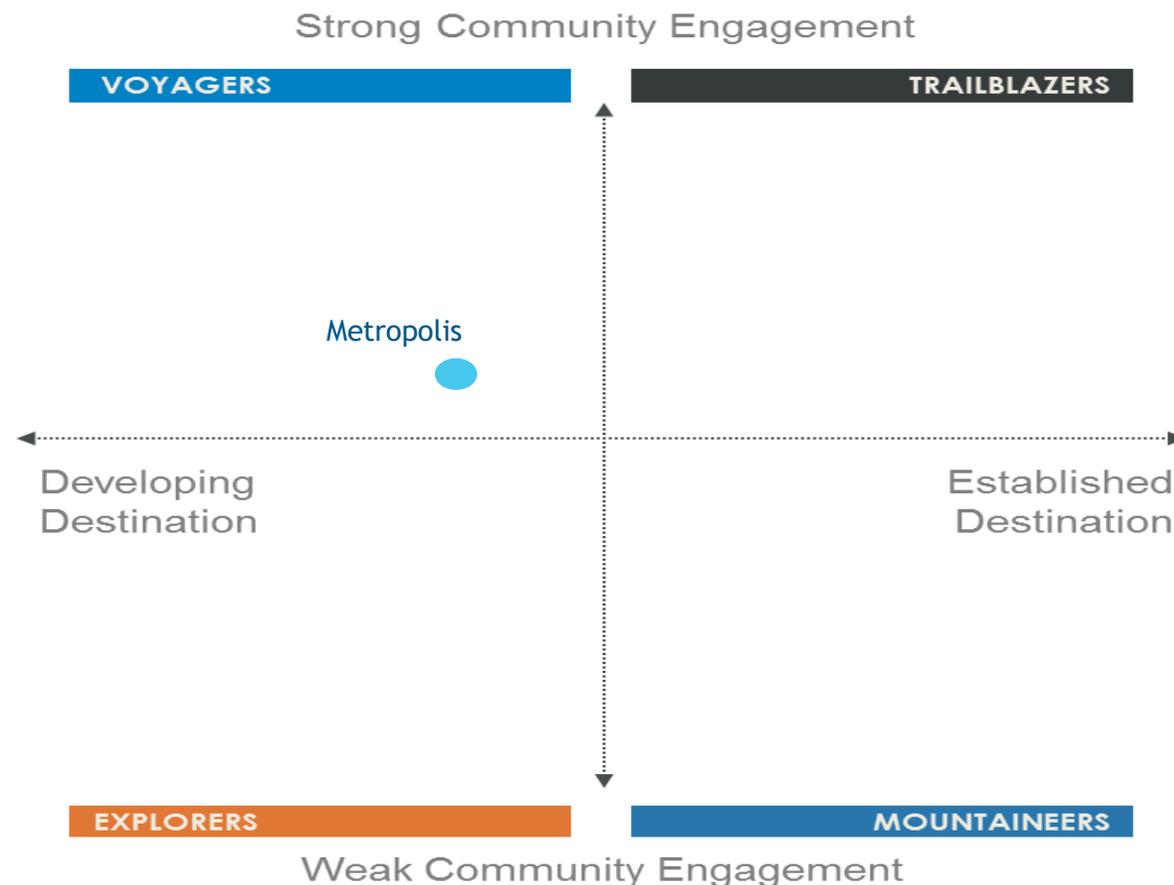
# Scenario Model



# Purpose of Diagnostic Tool

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

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



# Destination Strength Variables



**Destination  
Performance**



**Brand**



**Accommodation**



**Attractions and  
Entertainment**



**Conventions & Meeting  
Facilities**



**Air Access**



**Events**



**Sporting and  
Recreation Facilities**



**Communication &  
Internet Infrastructure**



**Mobility and Access**

# Community Support & Engagement Variables



**Effective DMO  
Governance Model**



**Membership Strength  
& Support**



**Industry Support**



**Local Community  
Support**



**Policy and  
Regulatory Environment**



**Workforce**



**Hospitality Culture**



**Regional Cooperation**



**Funding Support &  
Certainty**



**Economic Development**

# Destination Assessments



**350**

destinations from  
18 countries



**163**

detailed  
assessments  
completed in 11  
countries



**70**

underway or  
planned,  
including 4 other  
countries



**60**

in discussions,  
including  
14 other countries

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

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Dominican Republic, El  
Salvador, Ecuador  
South Africa

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



# Canada



# Latin America



# Europe



# Asia/Australia



# Regional Assessments



**Northwest Florida  
Tourism Coalition**

**South Africa  
Convention Bureau**

# Global **Results**

# Scenario Model

**VOYAGERS**  
10%

Strong Community Engagement

**TRAILBLAZERS**  
41%

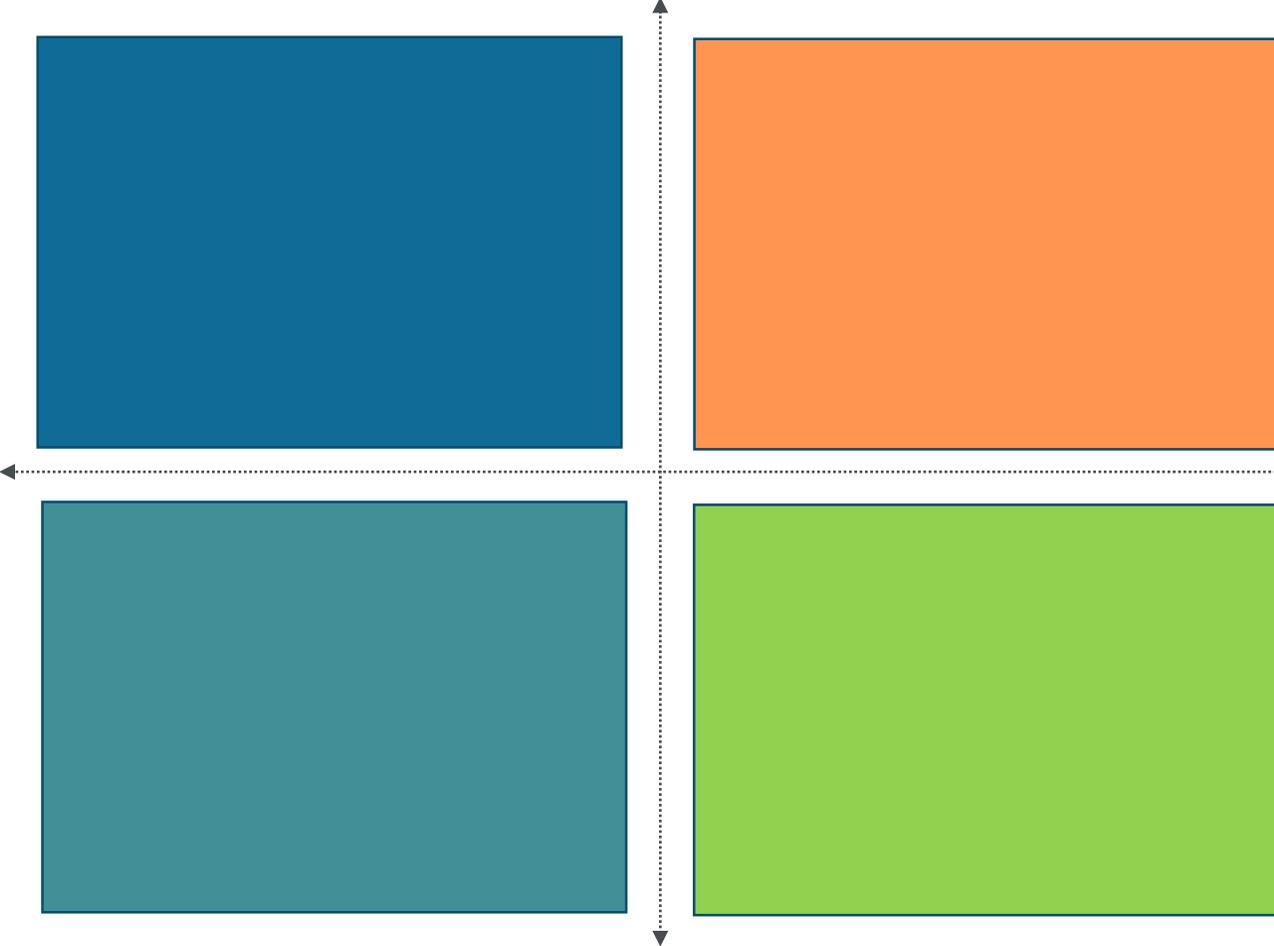
Developing  
Destination

Established  
Destination

**EXPLORERS**  
40%

Weak Community Engagement

**MOUNTAINEERS**  
9%



# Destination Strength Rankings – Global Averages



## Relative Importance



Brand

1<sup>st</sup>



Destination Performance

2<sup>nd</sup>



Attractions & Entertainment

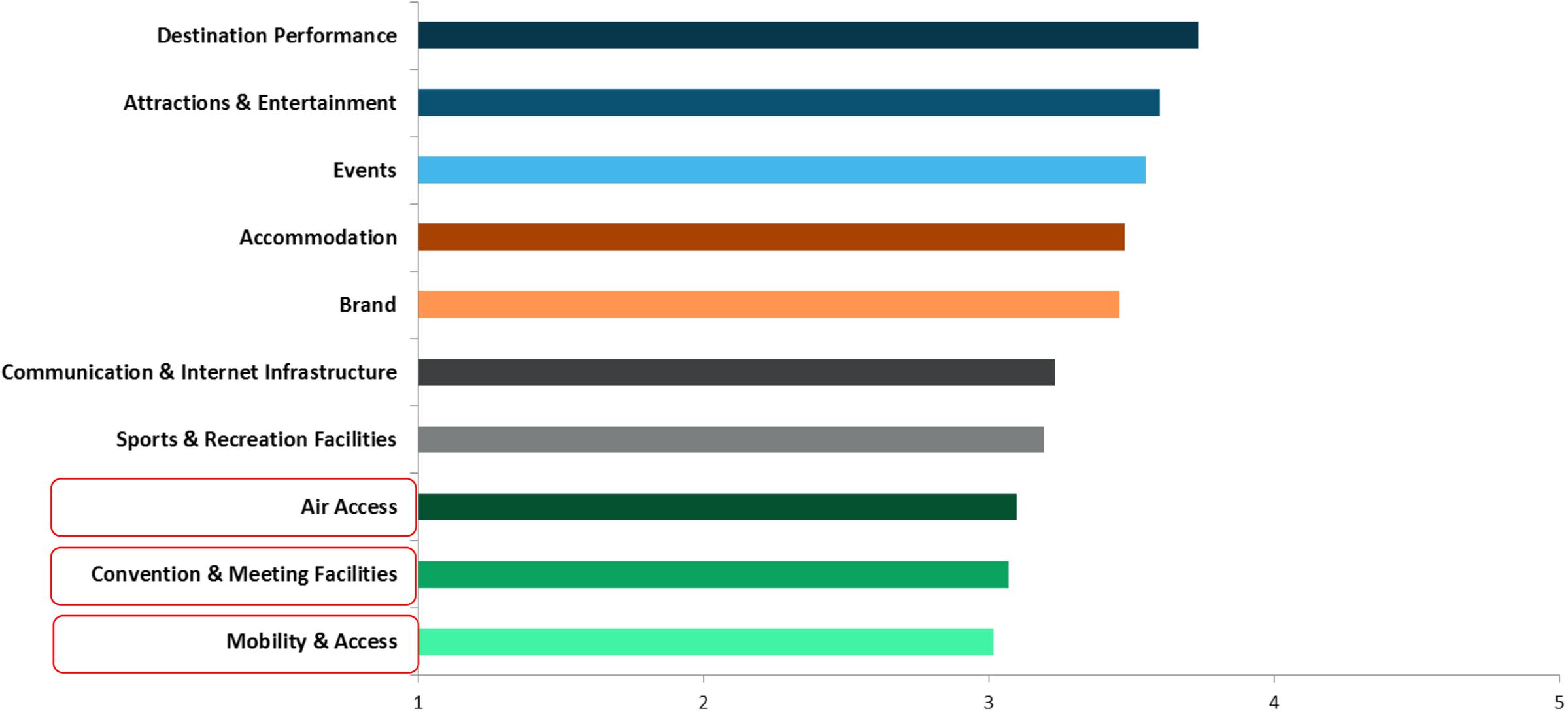
3<sup>rd</sup>



Accommodation

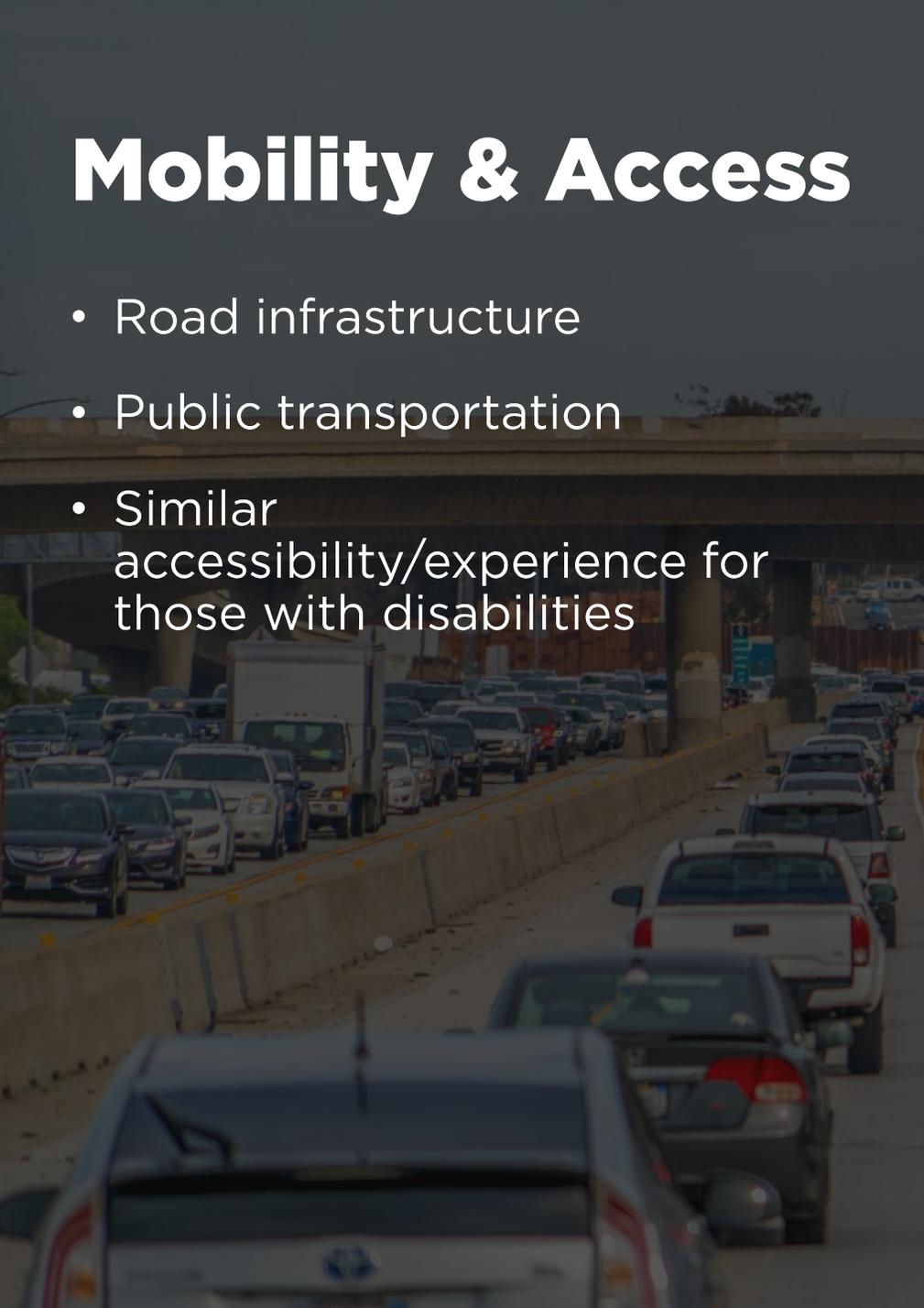
4<sup>th</sup>

# Destination Strength Performance



# Mobility & Access

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



# Convention & Meeting Facilities

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



# Air Access

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



# Community Support & Engagement – Global Averages



## Relative Importance



Funding Support & Certainty

1<sup>st</sup>



Industry Support

2<sup>nd</sup>



Effective Destination Organization  
Governance Model

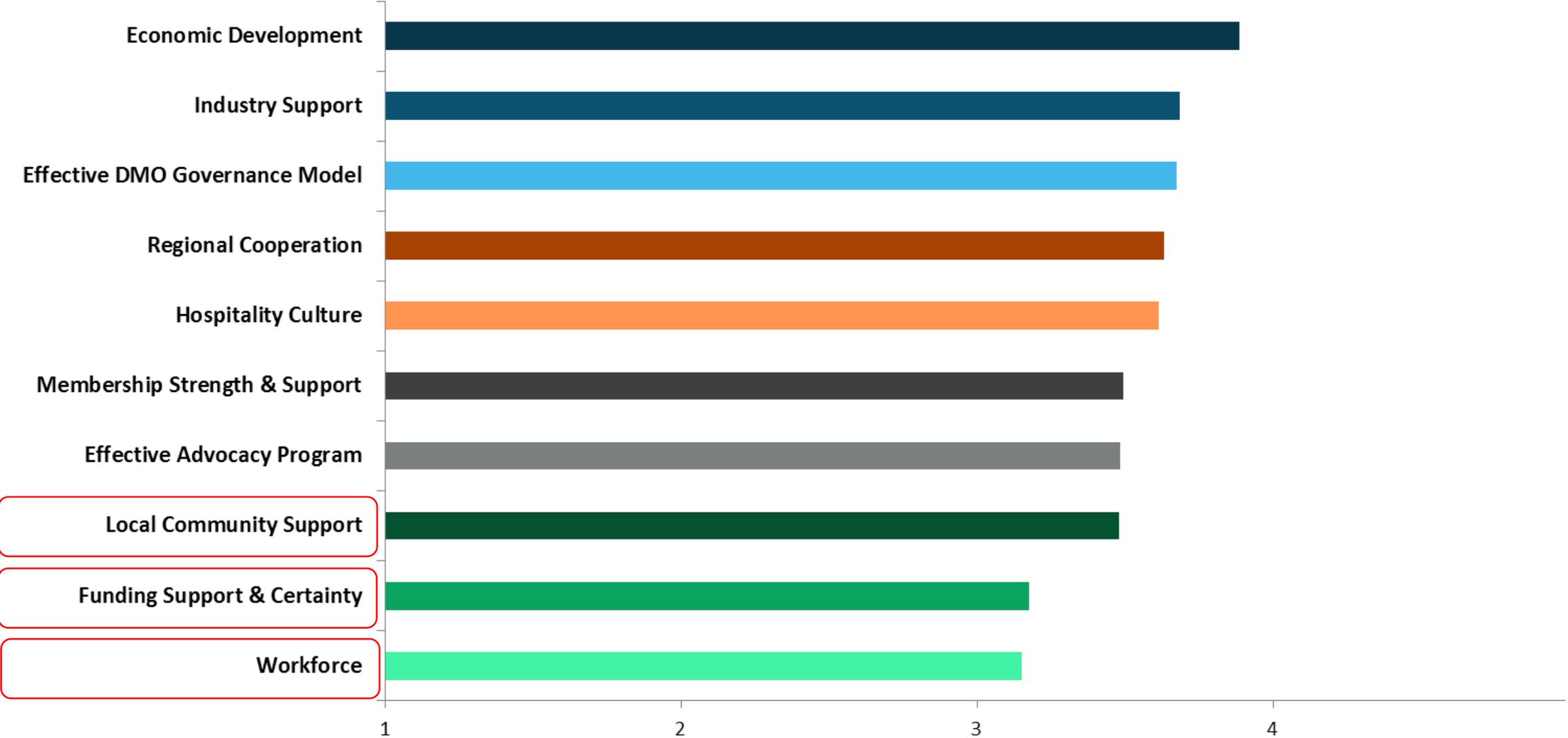
3<sup>rd</sup>



Local Community Support

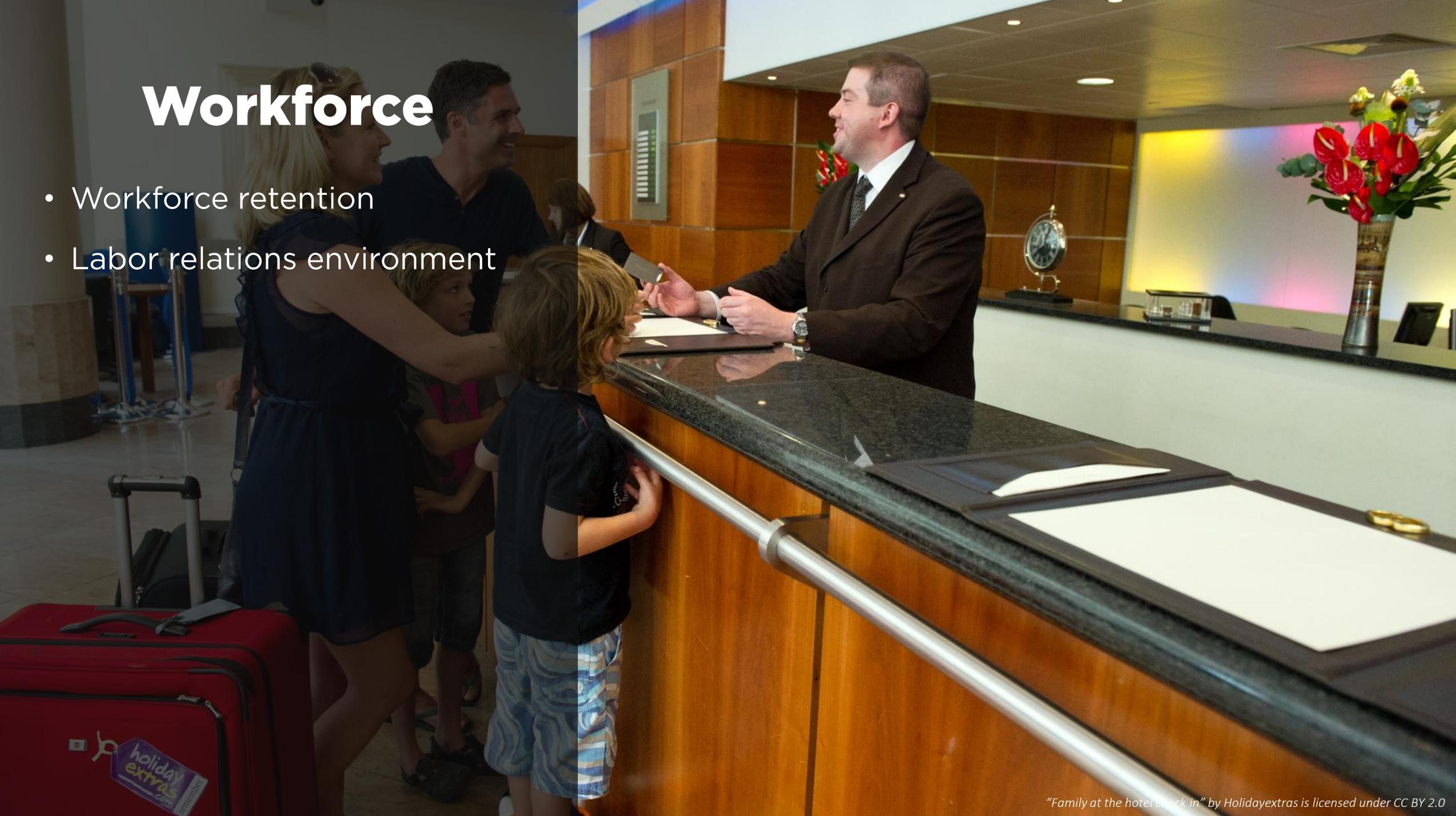
4<sup>th</sup>

# Community Support & Engagement Performance



# Workforce

- Workforce retention
- Labor relations environment



# Funding Support & Certainty

- Sufficient revenue sources
- Stable revenue sources



# Local Community Support

- Support from local residents and media



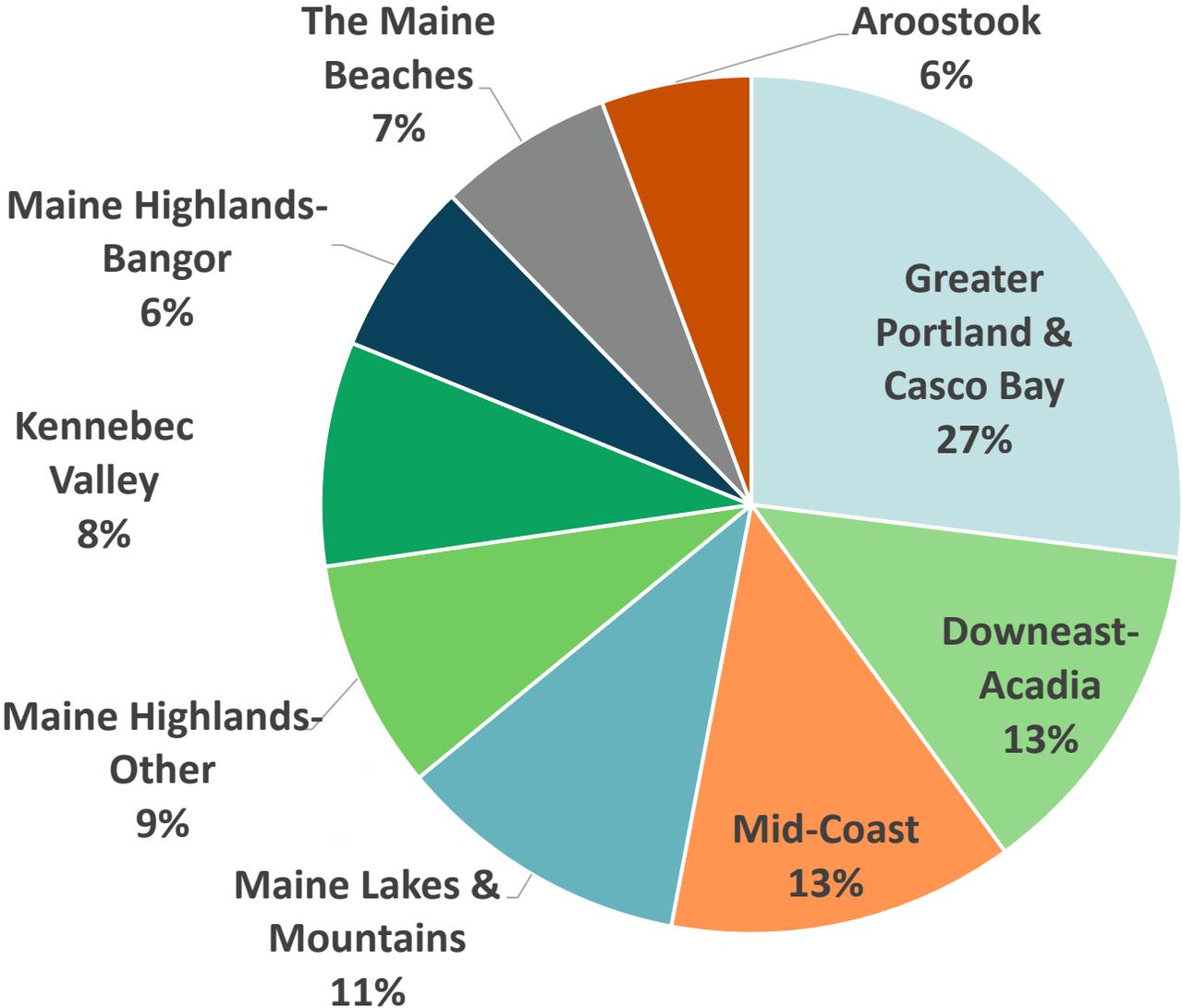
# DESTINATION NEXT

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

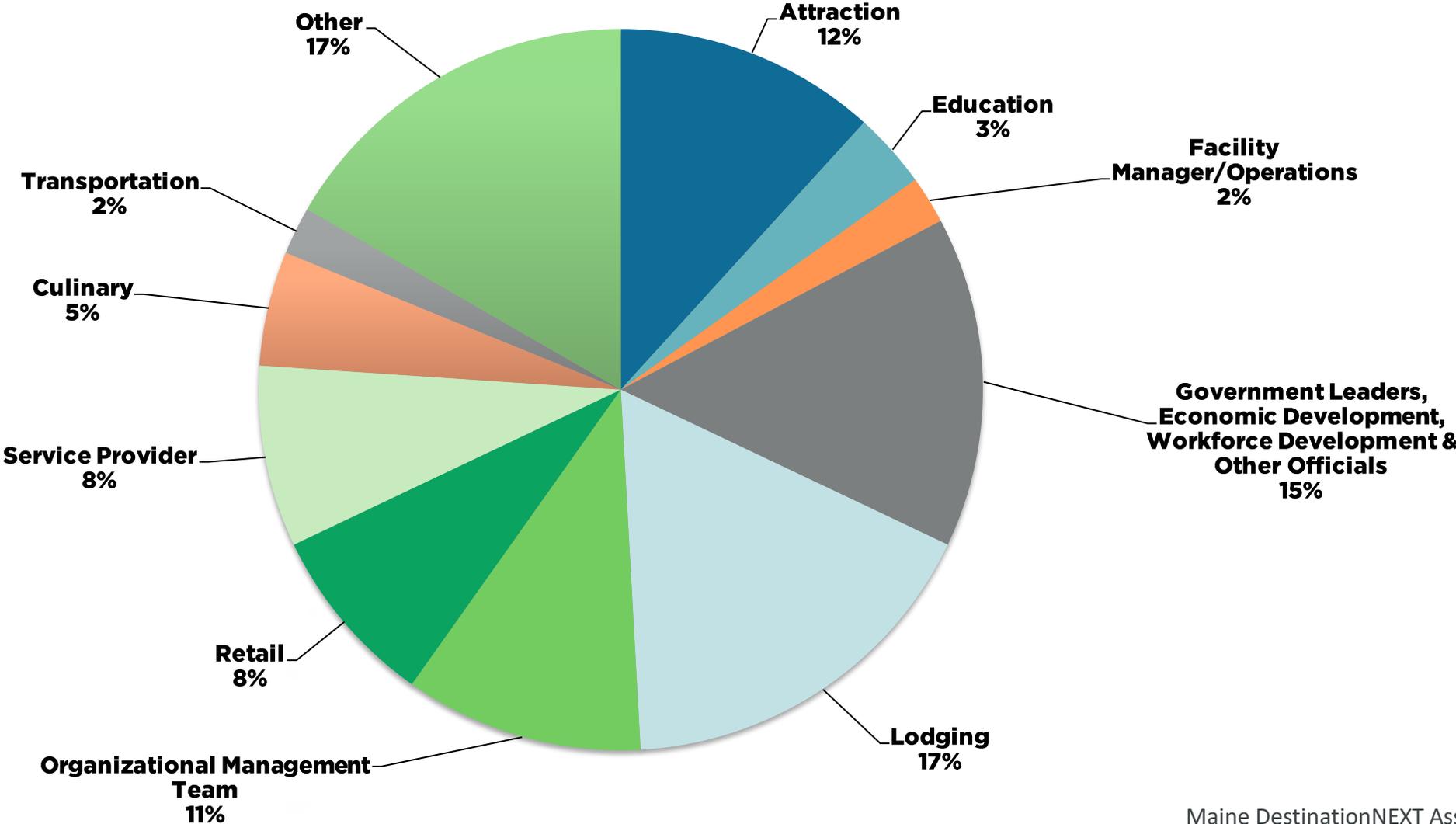
March 29, 2018



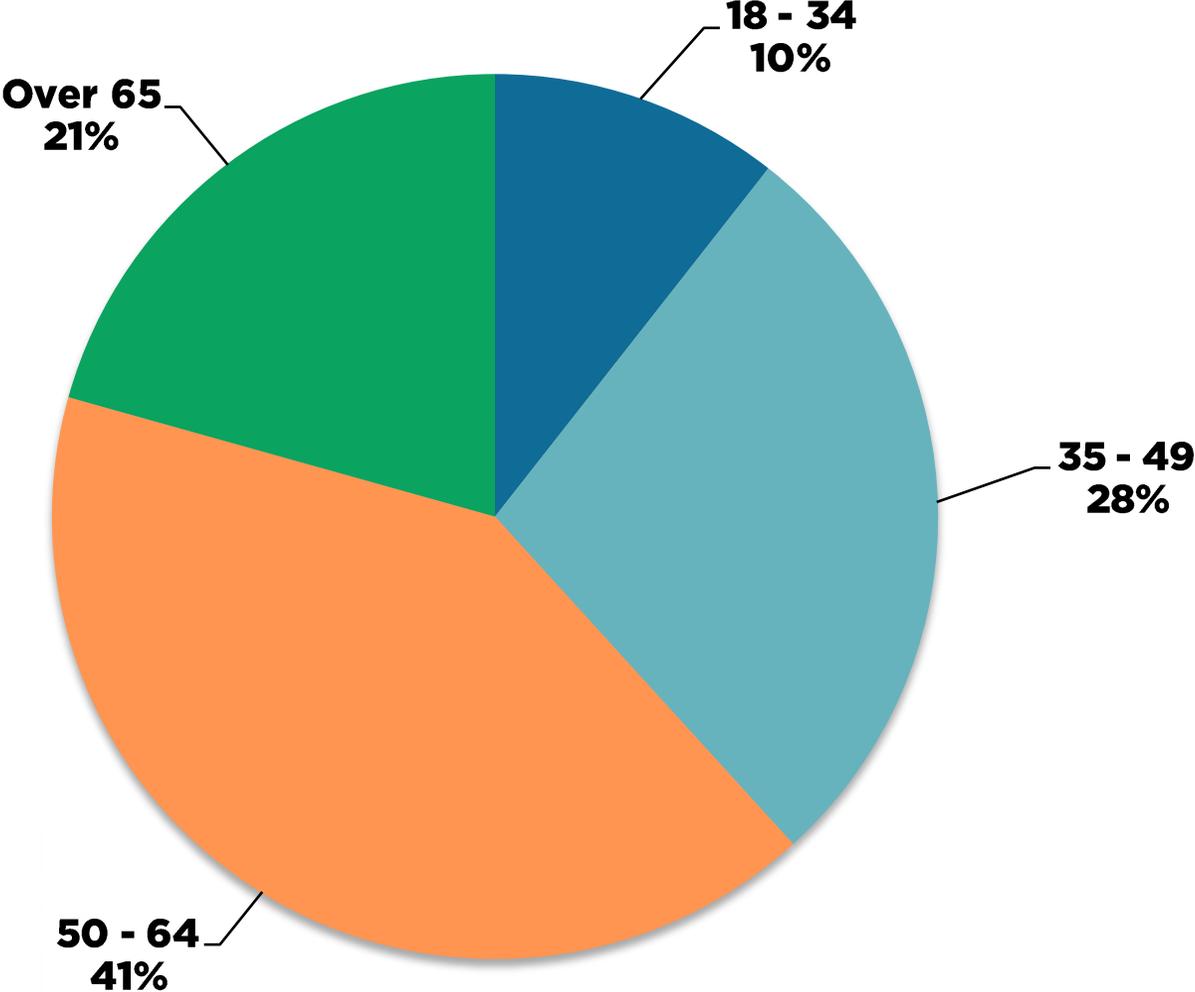
# 1,033 Responses - by Region



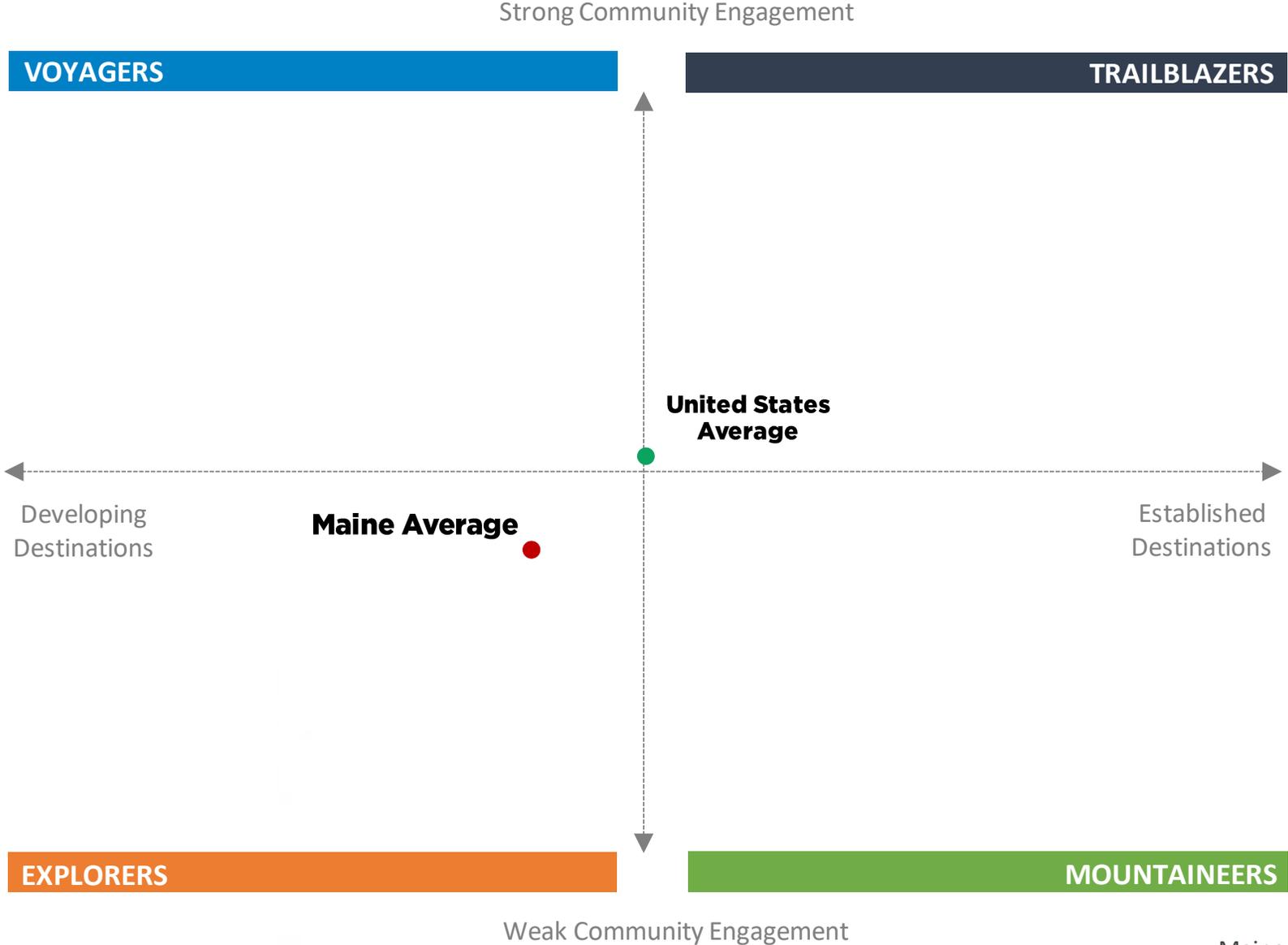
# 1,033 Responses – By Stakeholder



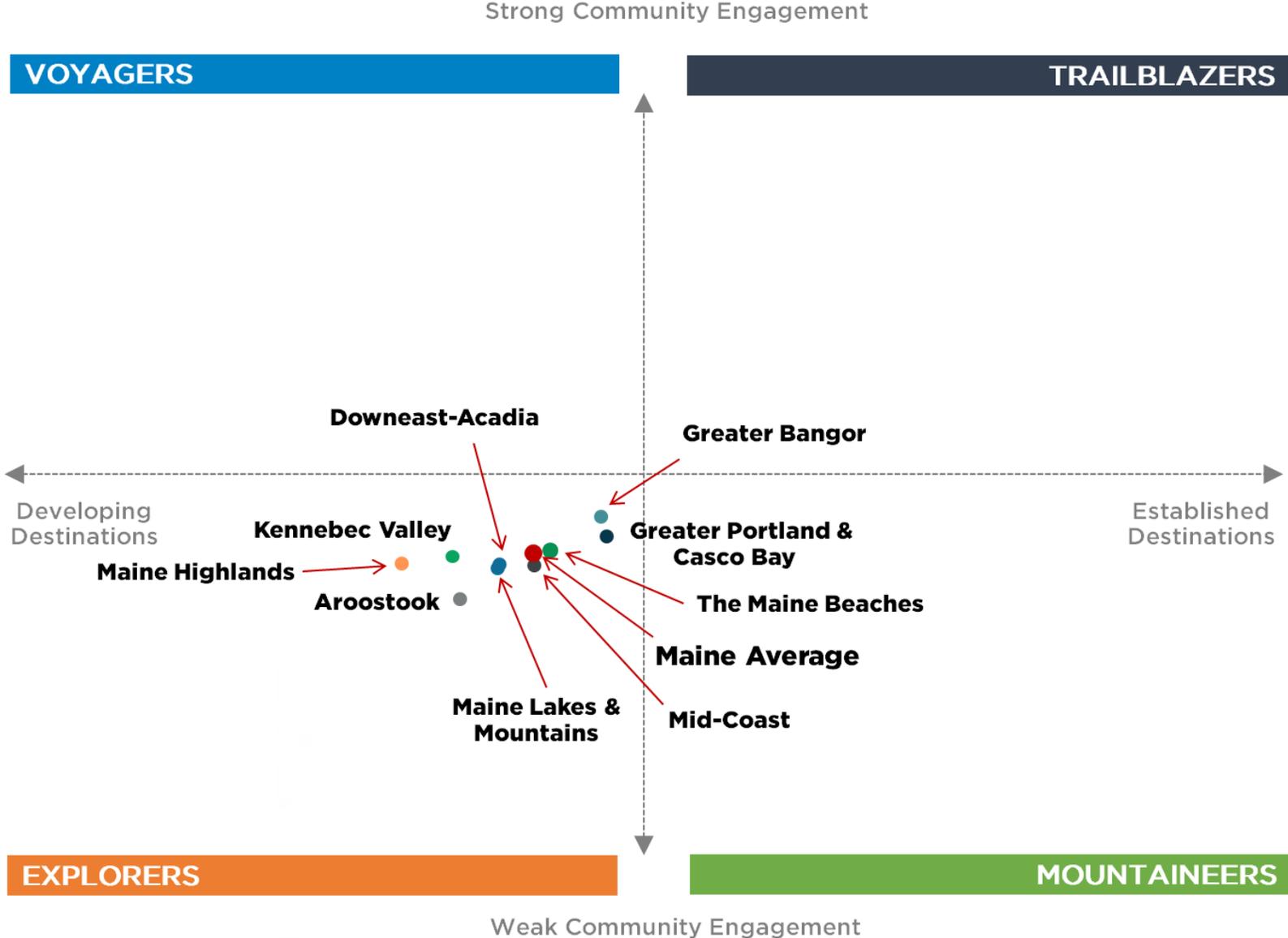
# Age Demographic



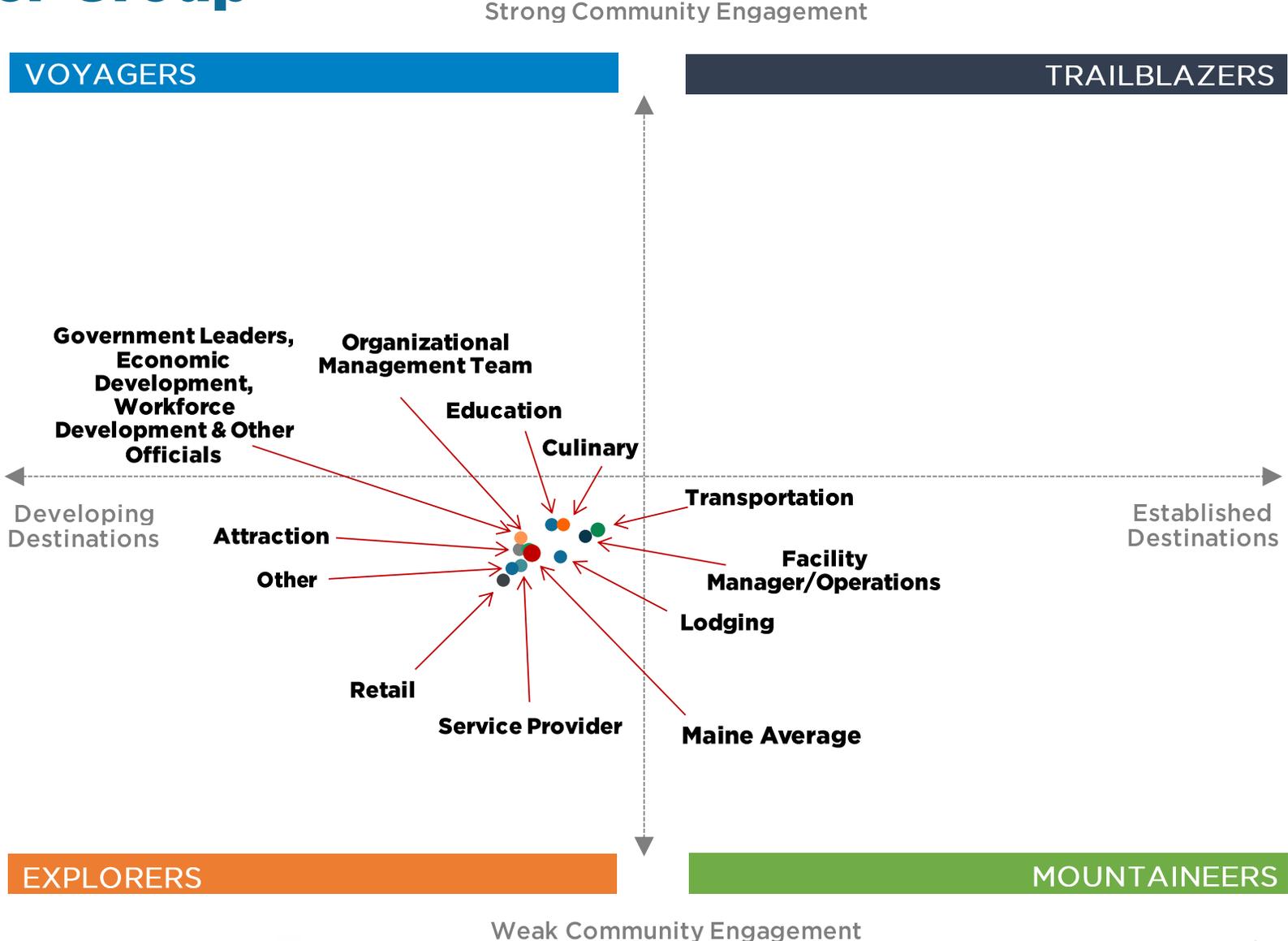
# State of Maine Overall Assessment - Industry



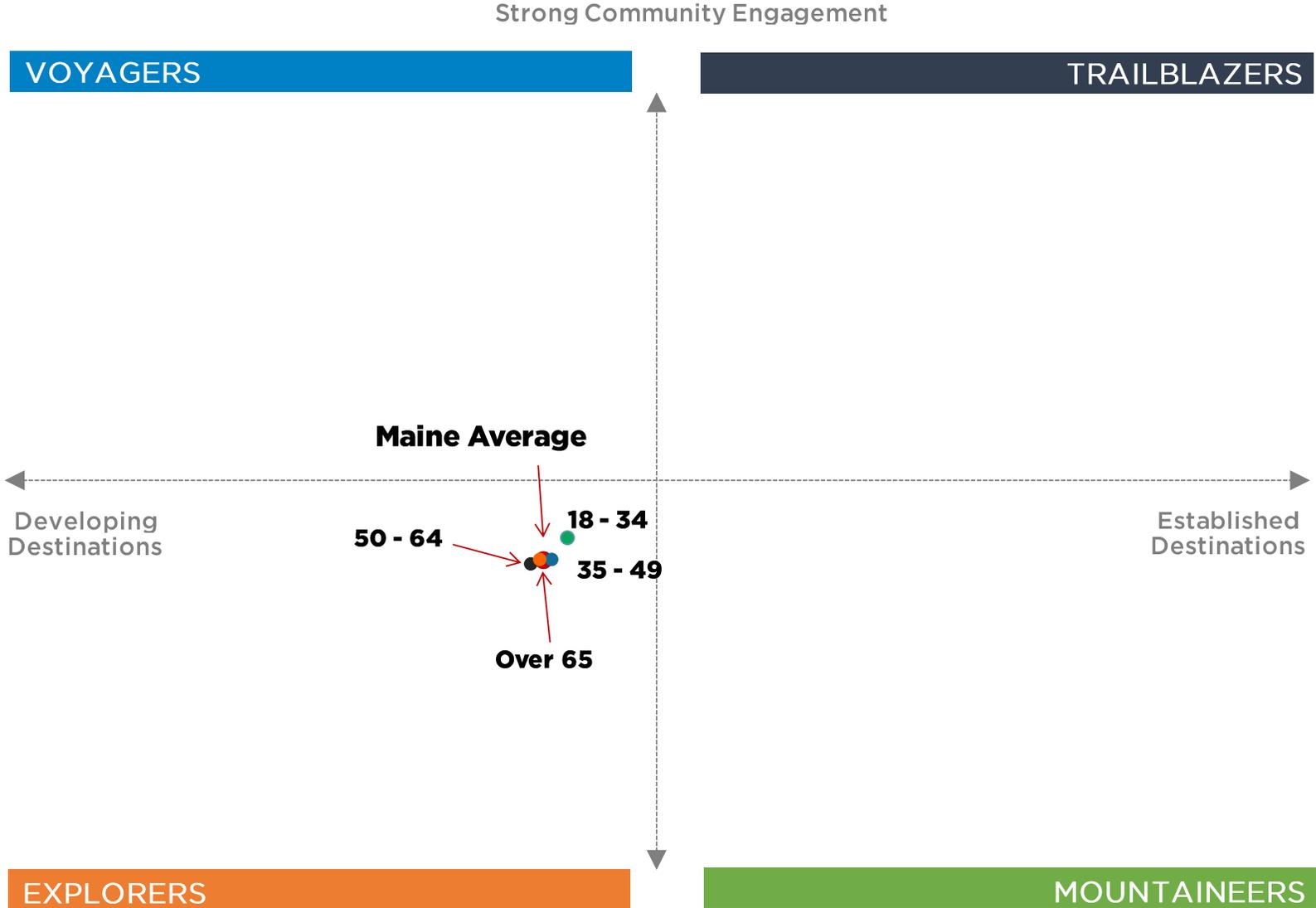
# State of Maine Overall Assessment – Regions



# State of Maine Overall Assessment – Stakeholder Group



# State of Maine Overall Assessment – Age



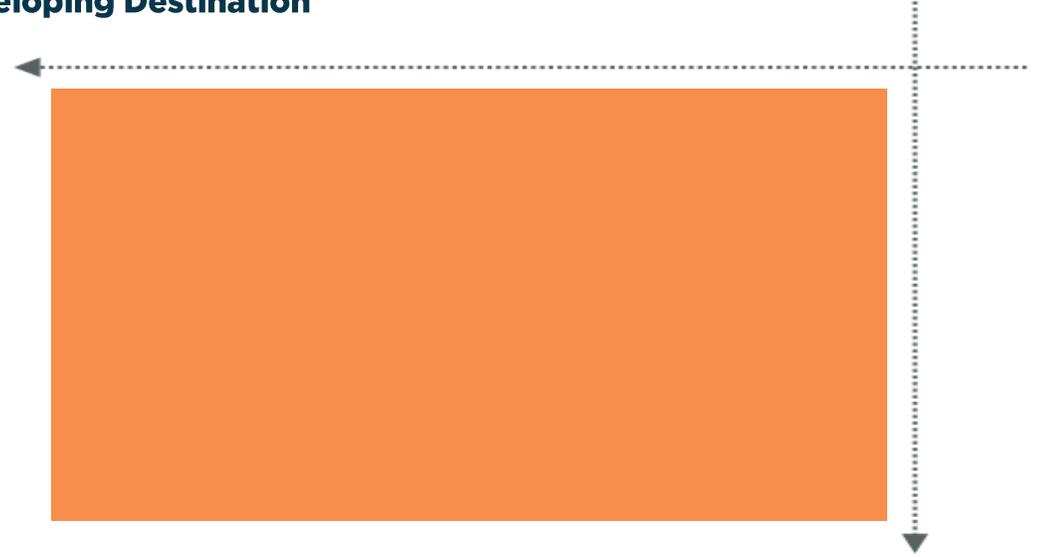
# Explorers

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

## Key Strategic Challenges

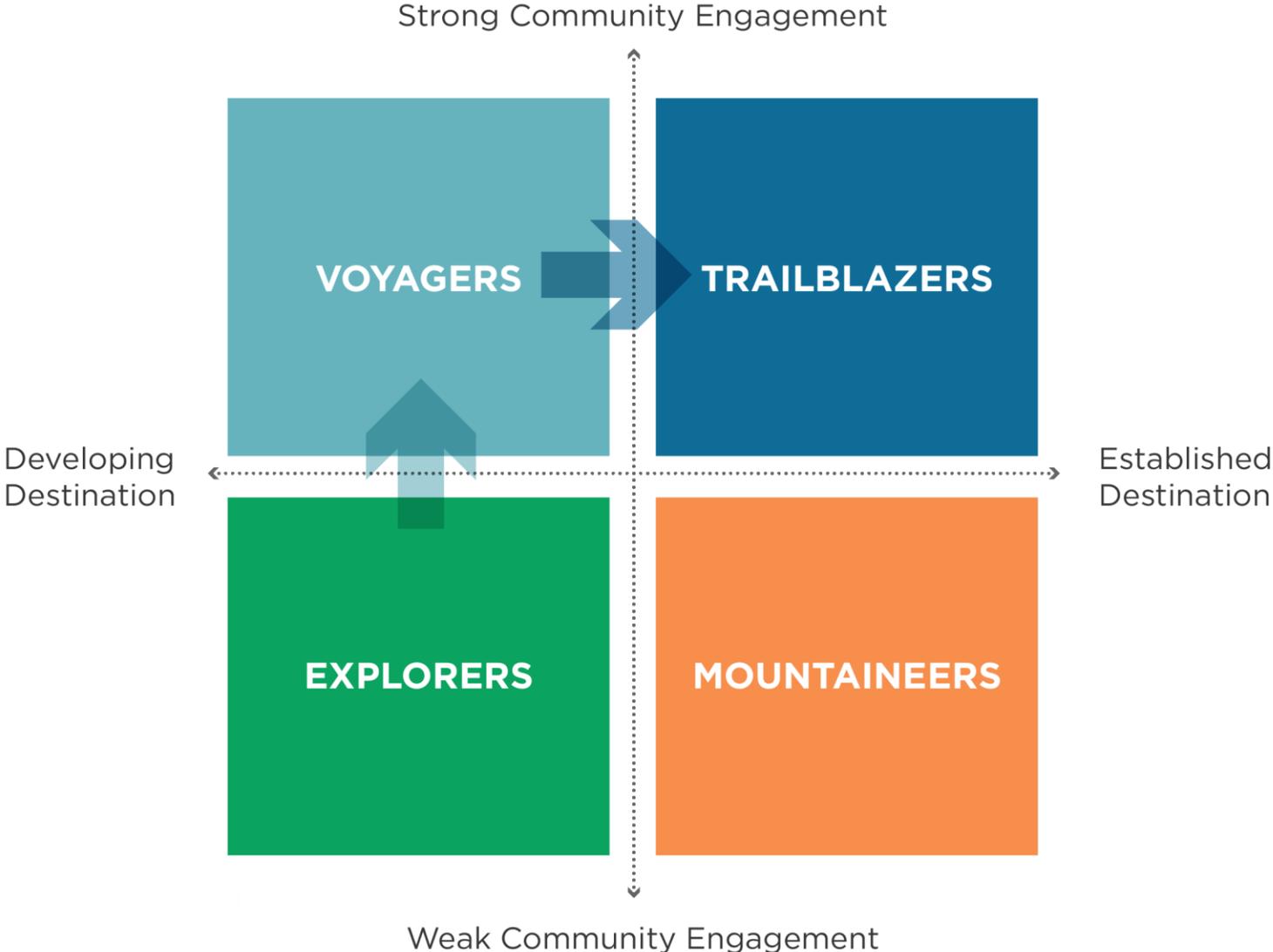
- **Rallying the community to work together towards a realistic vision and strategy**
- **Building community recognition and acceptance that transformational change is needed**
- **Implementing the strategy with limited resources**

**Developing Destination**

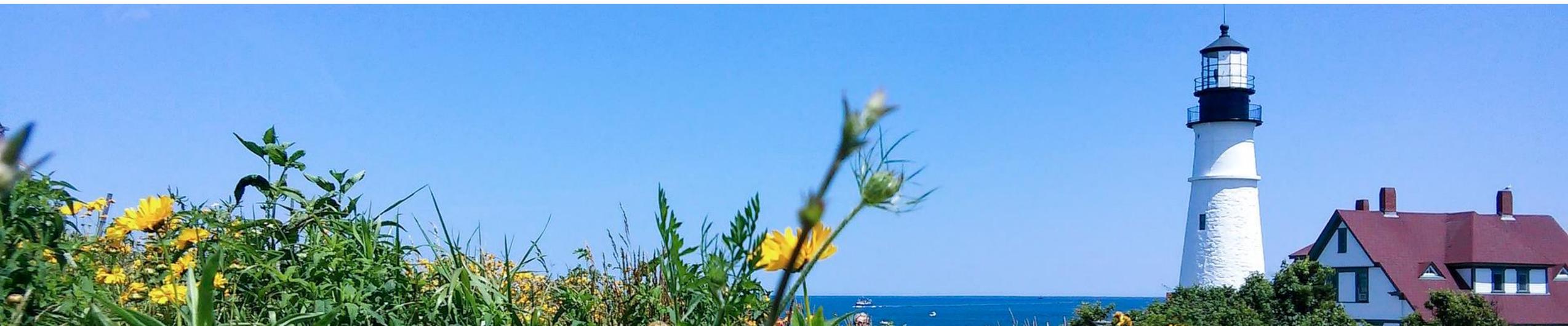


**Weak Community Engagement**

# Becoming a Trailblazer



# Destination Strength Rankings – State of Maine



# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Average	Standard Deviation	Industry Average	Maine Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.3%	1%	3.11	2.62	0.71
Accommodation	10.5%	10.9%	2%	3.54	3.06	0.71
Attractions & Entertainment	10.8%	10.8%	1%	3.65	3.49	0.75
Mobility & Access	10.1%	10.6%	2%	3.12	2.76	0.67
Destination Performance	10.0%	10.5%	1%	3.88	3.18	0.70
Sports & Recreation Facilities	9.4%	10.1%	1%	3.29	3.22	0.65
Brand	10.5%	9.8%	2%	3.49	3.42	0.57
Events	9.7%	8.9%	2%	3.63	3.27	0.70
Communication & Internet Infrastructure	10.1%	8.7%	2%	3.39	2.77	0.82
Air Access	9.2%	8.3%	2%	3.16	3.08	0.53

**DESTINATION STRENGTH - 0** 3.08

**INDUSTRY AVERAGE DESTINATION STRENGTH** 3.49

**RESULTING SCENARIO**

**EXPLORERS**

**Note**

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

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

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

# Destination Strength - Regional Report Card

Variable	Perceived Performance (1-5 scale)									
	Maine Average	Aroostook	Downeast-Acadia	Greater Portland & Casco Bay	Kennebec Valley	Maine Highlands	Greater Bangor	Maine Lakes & Mountains	Mid-Coast	The Maine Beaches
Convention & Meeting Facilities	2.62	2.21	2.46	2.87	2.28	2.03	3.12	2.53	2.70	2.73
Accommodation	3.06	2.67	2.91	3.41	2.59	2.32	3.39	2.96	3.14	3.20
Attractions & Entertainment	3.49	2.83	3.35	3.95	3.11	2.87	3.20	3.18	3.83	3.59
Mobility & Access	2.76	2.84	2.81	2.85	2.65	2.60	2.89	2.67	2.63	2.73
Destination Performance	3.18	2.82	3.06	3.50	2.81	2.71	3.40	2.97	3.13	3.34
Sports & Recreation Facilities	3.22	3.39	3.09	3.35	3.22	3.09	3.47	3.29	2.91	2.95
Brand	3.42	3.36	3.49	3.47	3.22	3.31	3.41	3.35	3.41	3.58
Events	3.27	3.17	3.21	3.36	3.31	2.85	3.84	3.11	3.34	3.10
Communication & Internet Infrastructure	2.77	2.69	2.48	3.02	2.46	2.37	2.97	2.75	2.68	2.94
Air Access	3.08	2.66	2.95	3.35	2.80	2.64	3.21	2.93	3.20	3.23

DESTINATION STRENGTH - Maine Average	3.08
INDUSTRY AVERAGE DESTINATION STRENGTH	3.49

RESULTING SCENARIO **EXPLORERS**

**Note**

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

# Community Support & Engagement – State of Maine



# Community Support & Engagement - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	Maine Average	Standard Deviation	Industry Average	Maine Average	Standard Deviation
Local Community Support	10.2%	10.6%	4%	3.56	3.44	0.79
Industry Support	9.9%	10.3%	2%	3.81	3.50	0.83
Hospitality Culture	10.2%	10.3%	1%	3.71	3.42	0.96
Regional Cooperation	10.0%	10.1%	1%	3.76	3.38	0.86
Economic Development	10.2%	10.0%	1%	3.95	4.00	0.63
Workforce	10.1%	10.0%	2%	3.31	2.39	0.72
Effective Advocacy Program	10.2%	9.9%	1%	3.63	3.22	0.81
Membership Strength & Support	9.6%	9.9%	2%	3.76	3.34	0.79
Funding Support & Certainty	9.9%	9.7%	4%	3.36	2.50	0.87
Effective DMO Governance Model	9.6%	9.2%	2%	3.80	3.22	0.87

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

## RESULTING SCENARIO EXPLORERS

**Note**

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# Community Support & Engagement - Regional Report Card

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

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

**RESULTING SCENARIO** **EXPLORERS**

**Note**  
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# Key Takeaways - Maine



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

1. Advertising & marketing
2. Visitor amenities & product development
3. Transportation

Factors	Aroostook	Downeast -Acadia	Highlands -Greater Bangor	Highlands -Other	Greater Portland & Casco Bay	Kennebec Valley	Mid- Coast	Maine Lakes & Mountains	The Maine Beaches
Advertising & Marketing	✓	✓	✓	✓	✓	✓	✓	✓	✓
Visitor Amenities & Product Development	✓	✓	✓	✓	✓	✓	✓	✓	✓
Engagement & Regional Support				✓					
Attractions & Entertainment						✓			
Transportation	✓	✓	✓		✓		✓	✓	✓

# Key Takeaways - Maine



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

1. Advertising, branding & marketing
2. Outdoor recreation & sports
3. Workforce

Opportunities	Aroostook	Downeast-Acadia	Highlands-Greater Bangor	Highlands-Other	Greater Portland & Casco Bay	Kennebec Valley	Mid-Coast	Maine Lakes & Mountains	The Maine Beaches
Outdoor Recreation & Sports	✓	✓		✓		✓		✓	
Advertising, Branding & Marketing	✓	✓	✓	✓		✓	✓	✓	
Accommodations				✓					
Conventions & Meetings					✓				
Food & Beverage						✓			
Attractions & Entertainment			✓						✓
Seasonality/Shoulder Seasons							✓		
Nature, Cultural, & Heritage Tourism	✓								
Workforce		✓			✓		✓		✓
Education & Training									
Planning & Experiential Product Development			✓					✓	✓
Transportation					✓				

# Key Takeaways - Maine



List up to three markets that you think have the most growth potential in the next three years.

1. Food & beverage
2. Outdoor recreation
3. Nature/wellness

Markets	Aroostook	Downeast-Acadia	Highlands -Greater Bangor	Highlands -Other	Greater Portland & Casco Bay	Kennebec Valley	Mid-Coast	Maine Lakes & Mountains	The Maine Beaches
Food & Beverage		✓	✓	✓	✓	✓	✓	✓	✓
Outdoor Recreation	✓	✓	✓	✓	✓	✓		✓	
Nature/Wellness	✓		✓	✓			✓	✓	✓
Niche Tourism Markets					✓	✓			✓
Arts/Culture/Heritage Tourism	✓	✓					✓		

# DESTINATION NEXT

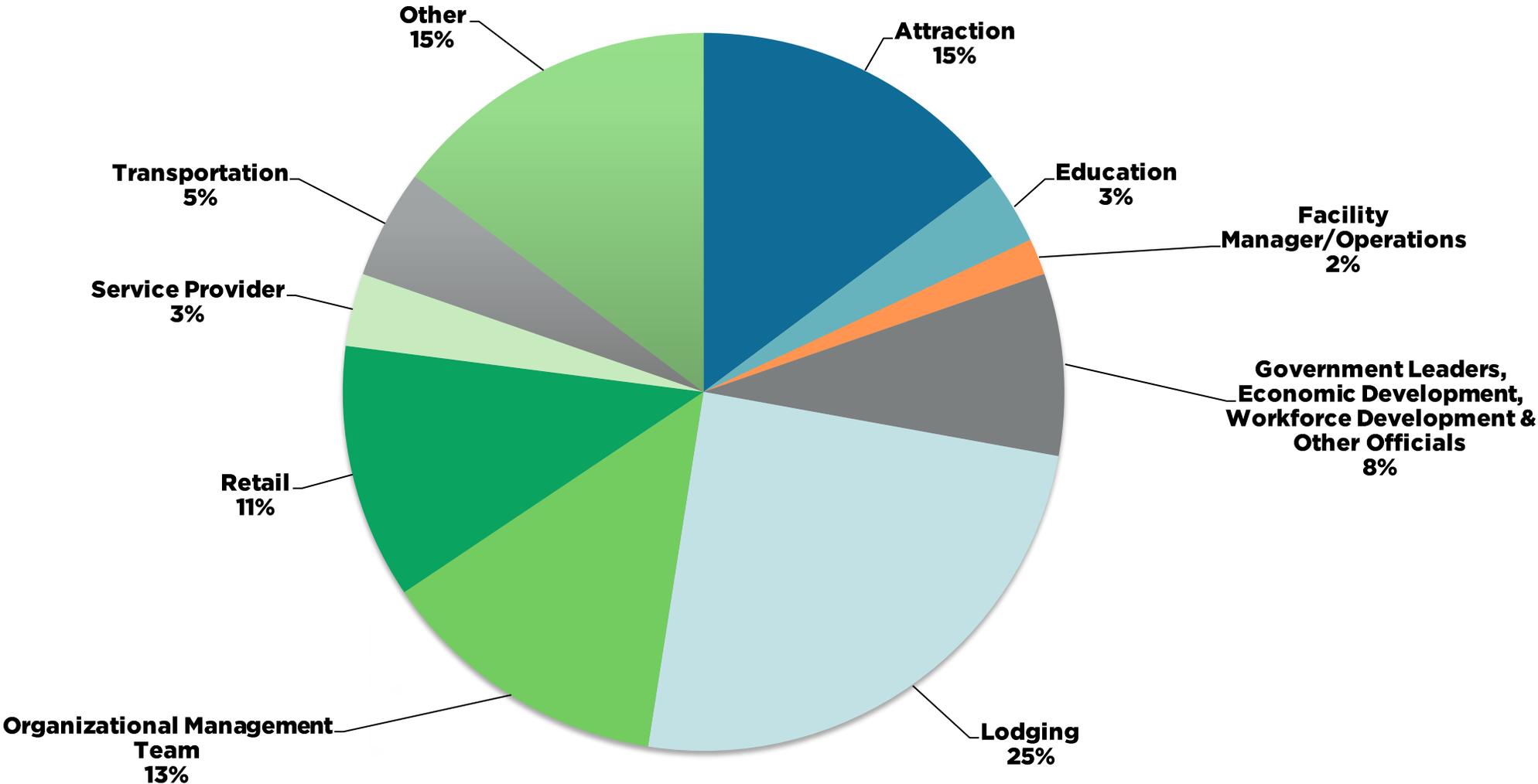
Multi-User Online Diagnostic  
Tool Results:

State of Maine Assessment -  
The Maine Beaches

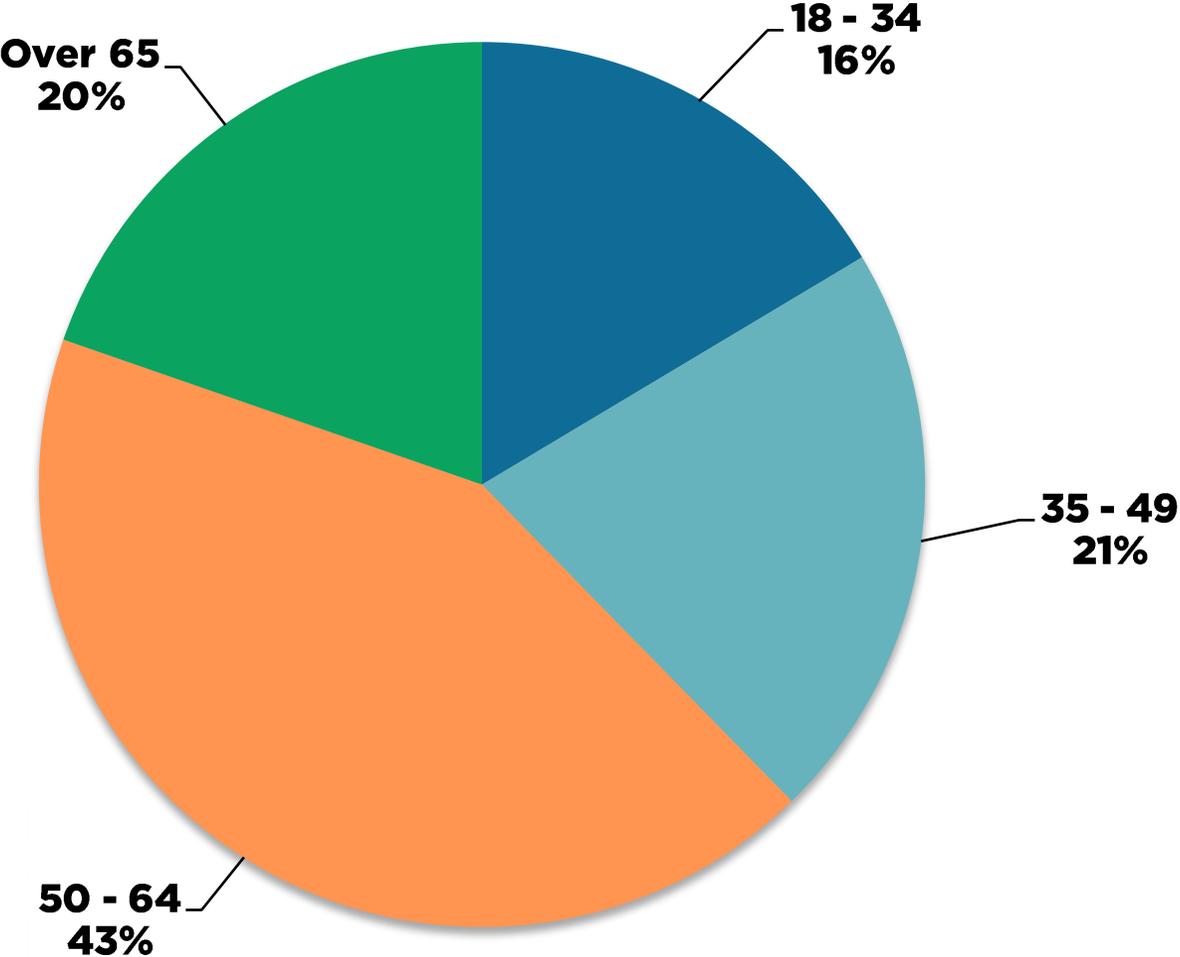
June 8, 2018



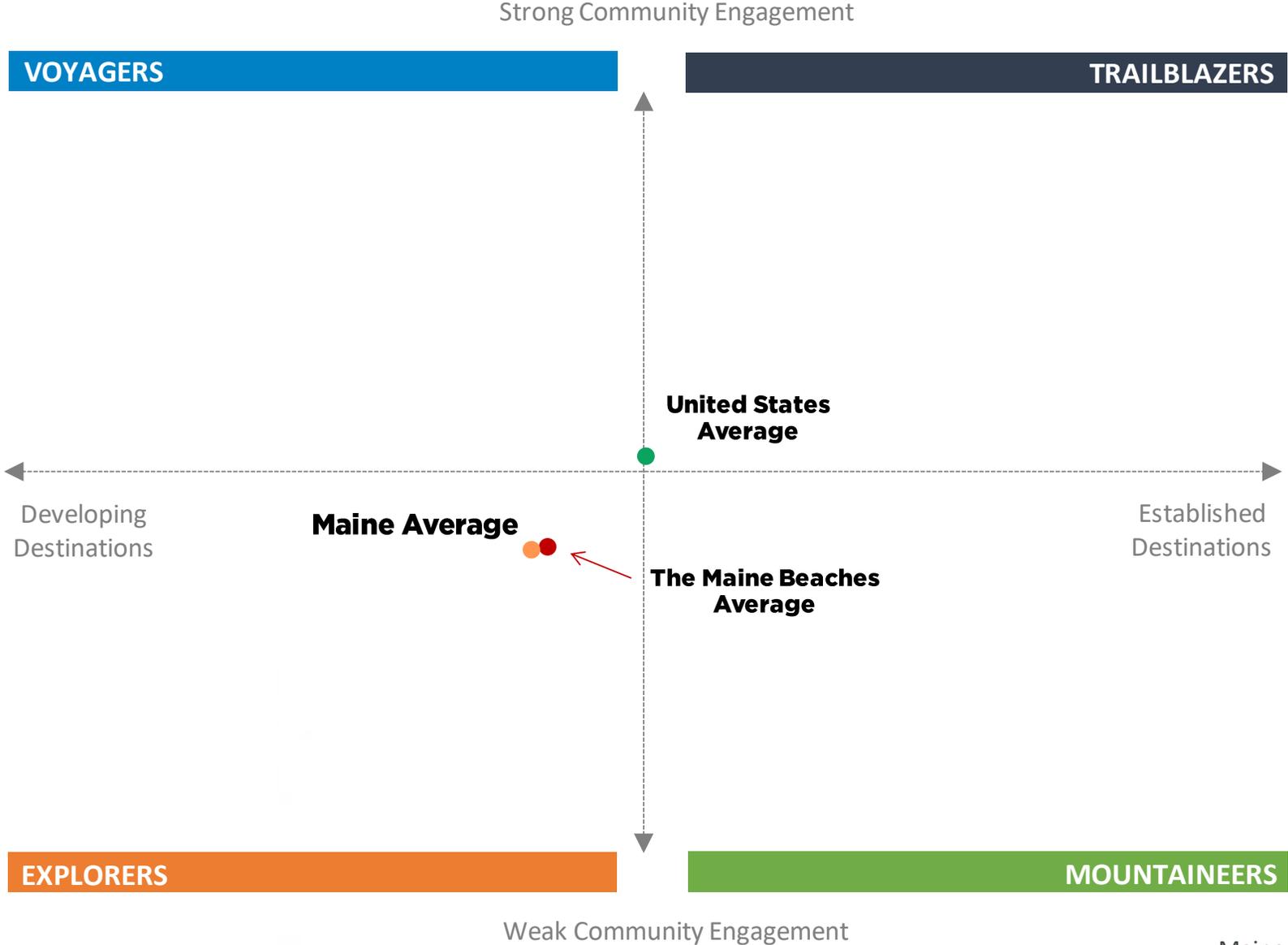
# 61 Responses



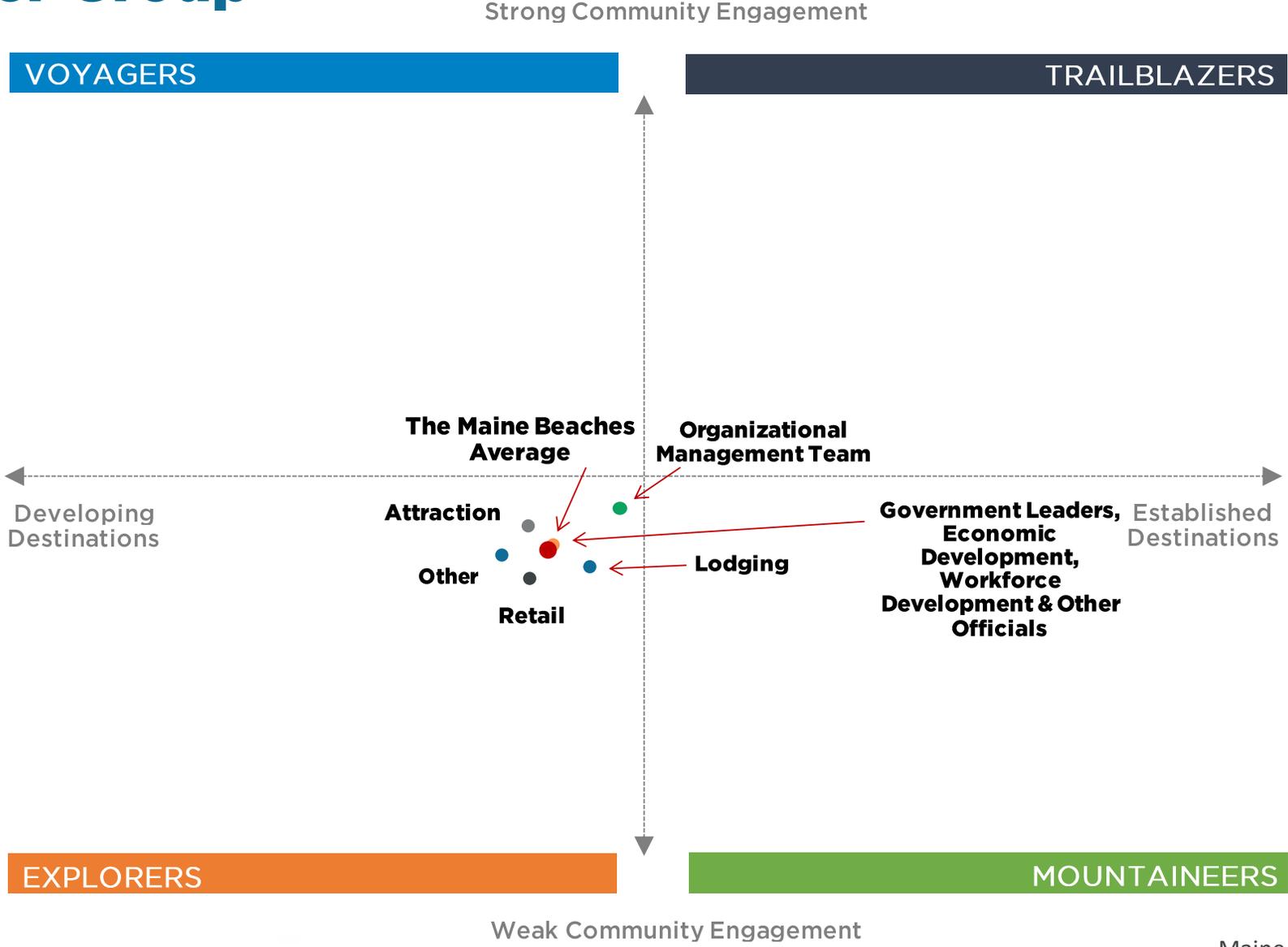
# Age Demographic



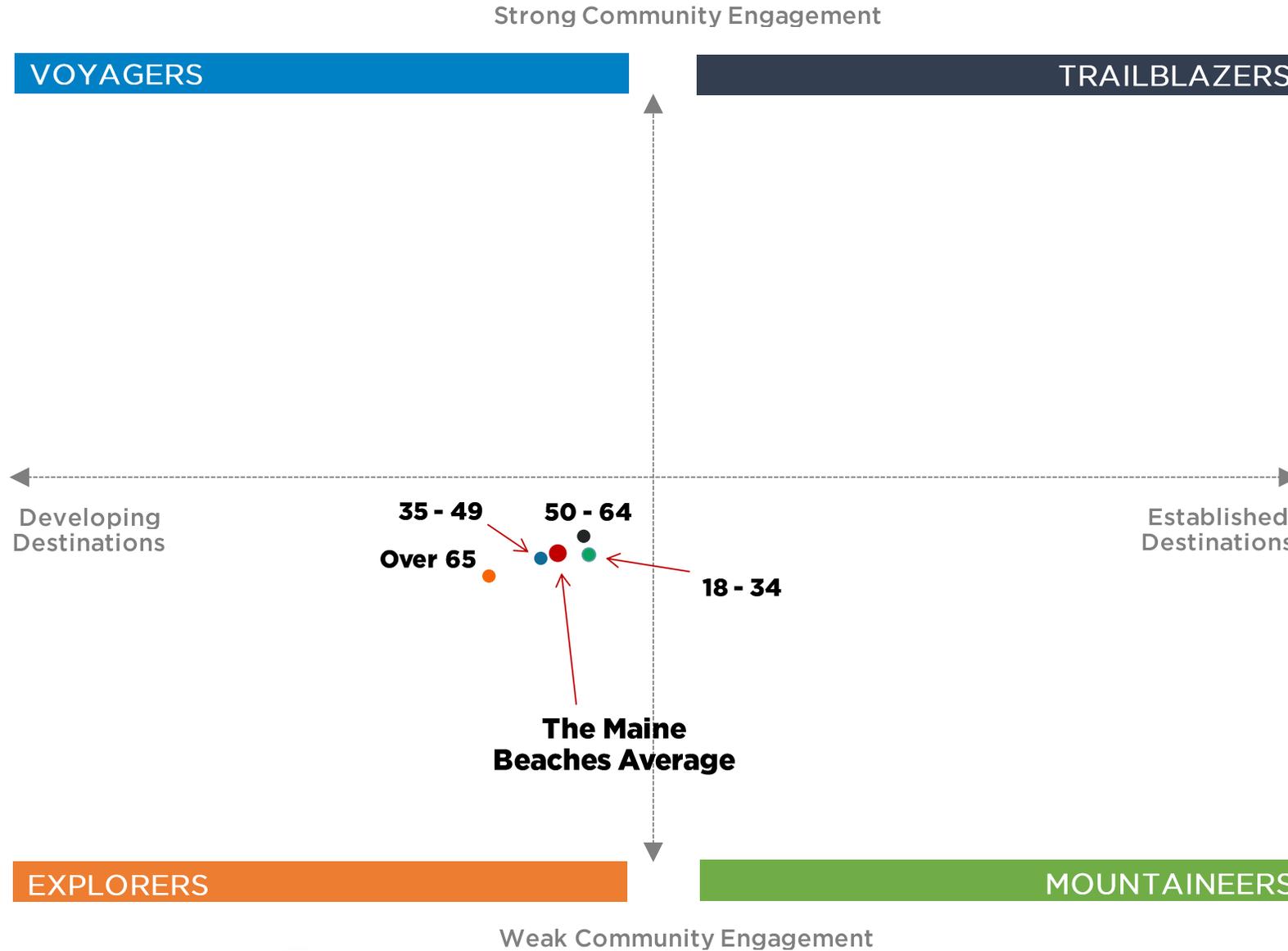
# The Maine Beaches Overall Assessment - Industry



# The Maine Beaches Overall Assessment – Stakeholder Group



# The Maine Beaches Overall Assessment - Age



# Destination Strength Rankings – The Maine Beaches



	Relative Importance	Perceived Performance
 Convention & Meeting Facilities	1 <sup>st</sup>	9 <sup>th</sup>
 Accommodation	2 <sup>nd</sup>	5 <sup>th</sup>
 Attractions & Entertainment	3 <sup>rd</sup>	1 <sup>st</sup>
 Mobility & Access	4 <sup>th</sup>	10 <sup>th</sup>

# Destination Strength – Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	The Maine Beaches Average	Standard Deviation	Industry Average	The Maine Beaches Average	Standard Deviation
Convention & Meeting Facilities	9.7%	11.5%	1%	3.11	2.73	0.73
Accommodation	10.5%	11.3%	2%	3.54	3.20	0.61
Attractions & Entertainment	10.8%	11.2%	2%	3.65	3.59	0.60
Mobility & Access	10.1%	10.4%	2%	3.12	2.73	0.65
Sports & Recreation Facilities	9.4%	10.2%	1%	3.29	2.95	0.67
Destination Performance	10.0%	10.1%	2%	3.88	3.34	0.53
Brand	10.5%	9.5%	3%	3.49	3.58	0.47
Events	9.7%	8.8%	2%	3.63	3.10	0.59
Communication & Internet Infrastructure	10.1%	8.6%	1%	3.39	2.94	0.77
Air Access	9.2%	8.4%	2%	3.16	3.23	0.49

<b>DESTINATION STRENGTH - The Maine Beaches</b>	<b>3.14</b>
<b>INDUSTRY AVERAGE DESTINATION STRENGTH</b>	<b>3.49</b>

**RESULTING SCENARIO**

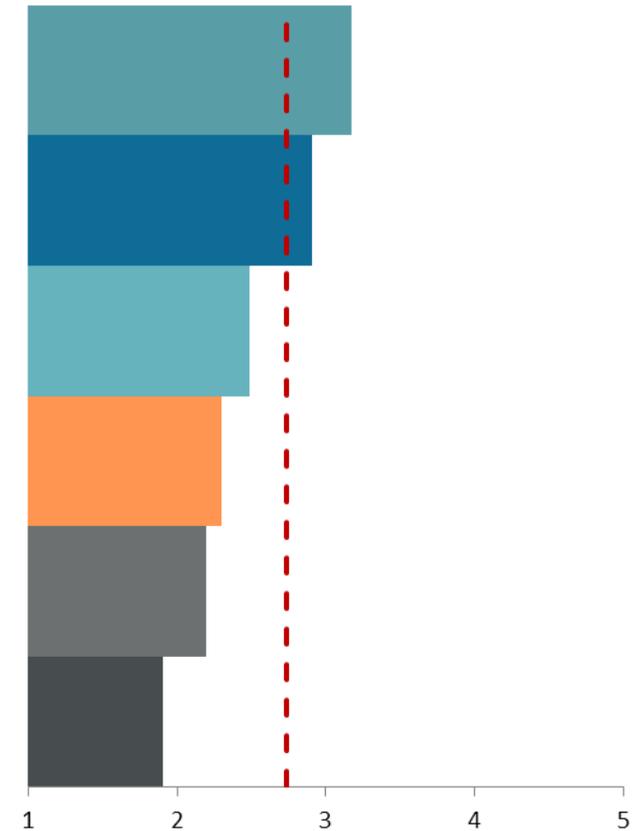
**EXPLORERS**

**Note**

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# Convention & Meeting Facilities

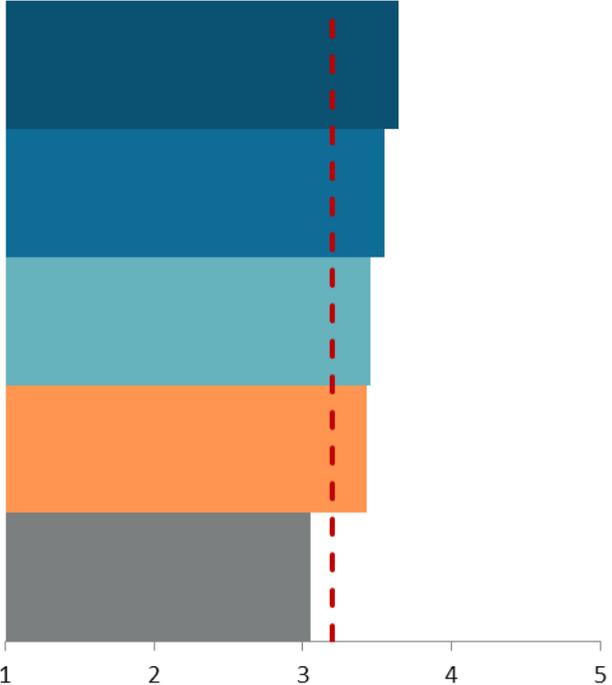
- Where possible, hotels/other meeting venues take full advantage of the views
- Has good, unique off-site venues for special events
- Offers an abundance of professional and experienced convention and/or meeting services suppliers
- Has the necessary convention, meeting, and trade show facilities to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

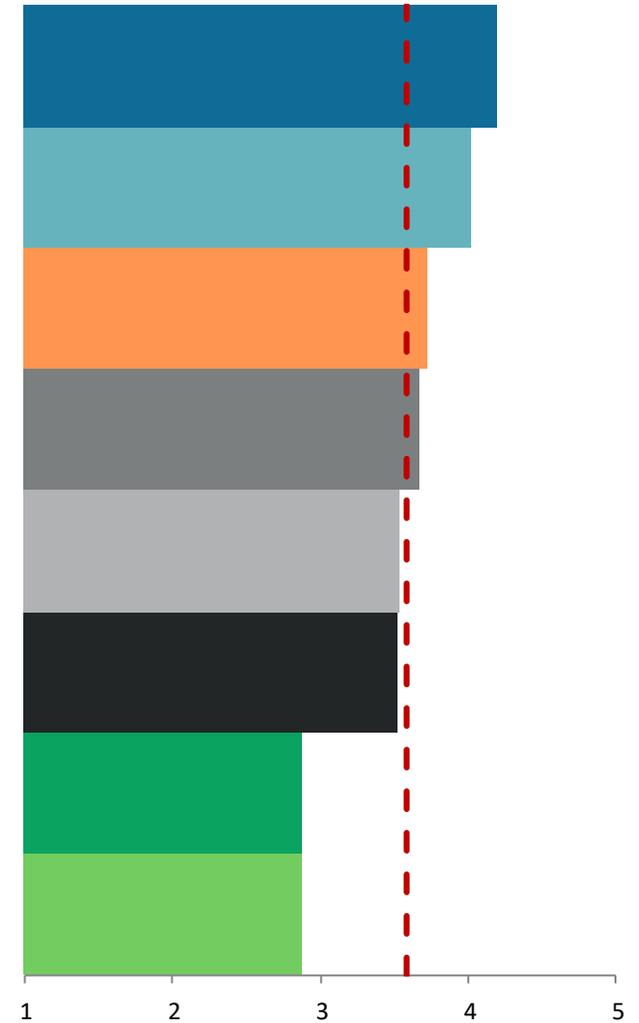
- The location and proximity of accommodation options in the region meets visitor needs
- Offers a diversity of accommodation price options
- Has adequate hotel accommodations capacity
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Has a healthy presence of well-known brand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



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

# Attractions & Entertainment

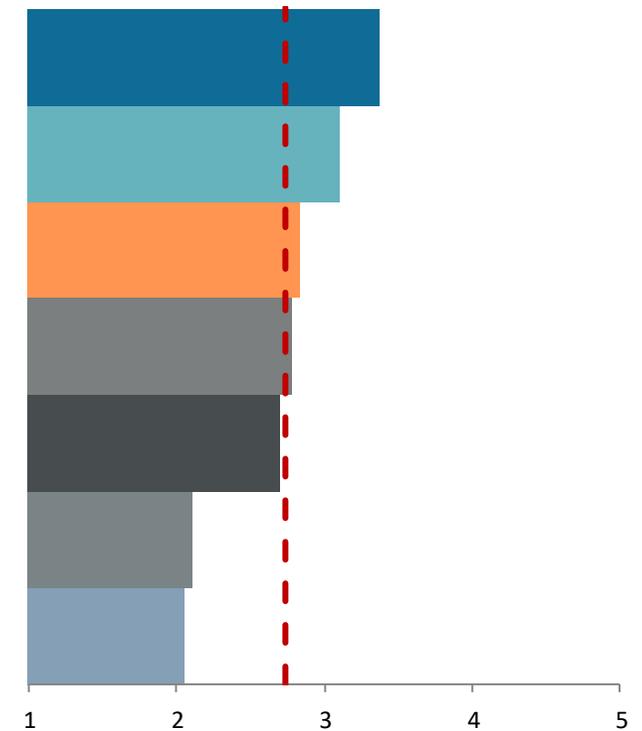
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has unique and high-quality dining options
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)
- Towns and cities offer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

# Mobility & Access

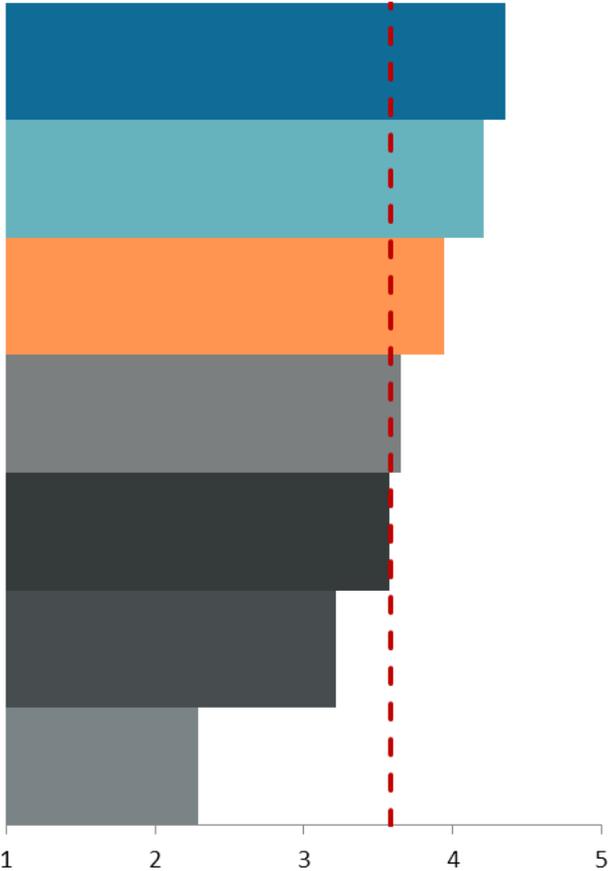
- There are a number of sufficient and visible information centers available to tourists
- Has great directional signage and highways that make it easy to get around
- Provides good access and mobility for those with disabilities
- Has adequate water access that makes it easy for visitors to get around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



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

# Brand

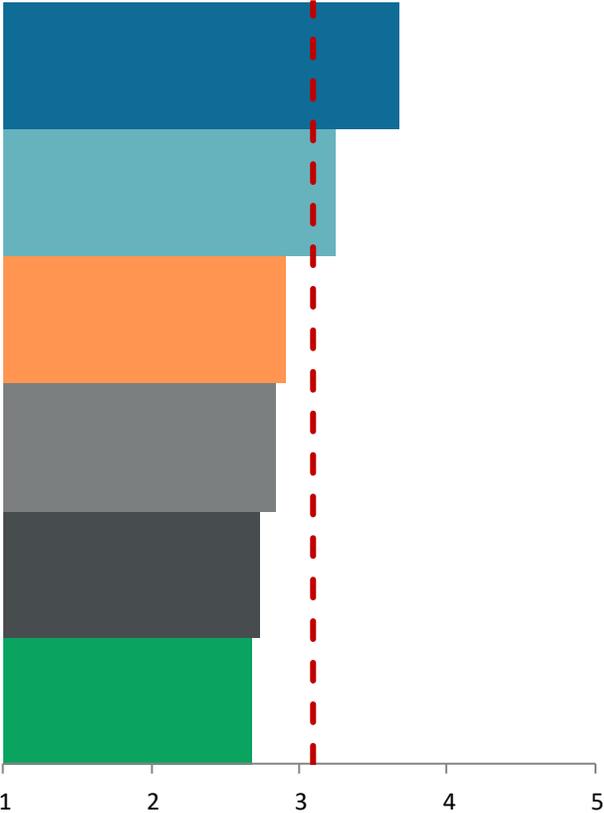
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for having a lot of things to see and do
- Is known for being environmentally conscious and sustainable
- Appeals to a diverse range of visitors
- Has an effective region-wide 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

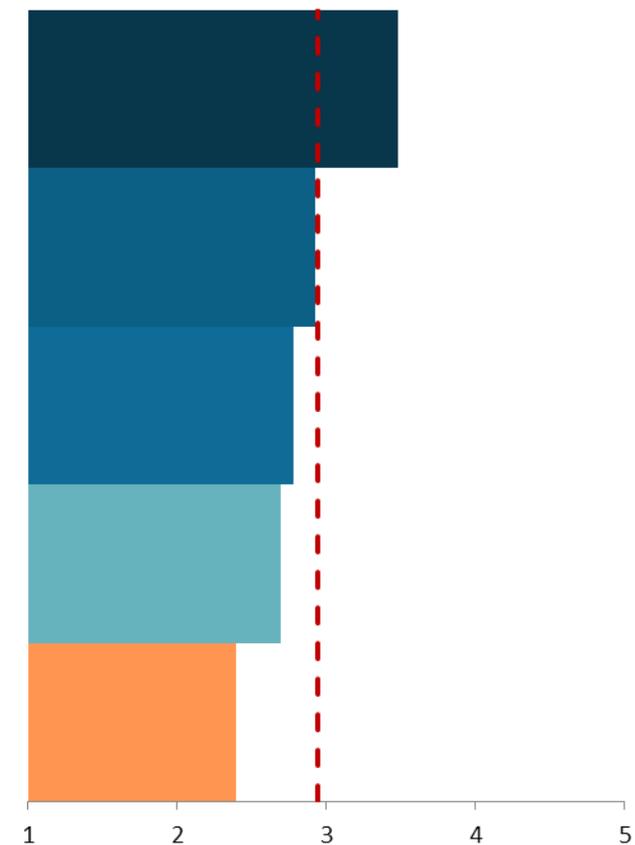
- Has an abundance of parks and outdoor spaces for handling special events
- Offers major events that attract non-local visitors
- The citizens of the region are supportive of hosting major sporting/national or international events
- Government is cooperative and supportive in attracting and hosting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



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

# Communication & Internet Infrastructure

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



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

# Community Support & Engagement – The Maine Beaches



	Relative Importance	Perceived Performance
 Local Community Support	1 <sup>st</sup>	3 <sup>rd</sup>
 Hospitality Culture	2 <sup>nd</sup>	5 <sup>th</sup>
 Effective Advocacy Program	3 <sup>rd</sup>	7 <sup>th</sup>
 Workforce	4 <sup>th</sup>	10 <sup>th</sup>

# Community Support & Engagement - Report Card

Variable	Relative Importance (0-100%)			Perceived Performance (1-5 scale)		
	Industry Average	The Maine Beaches Average	Standard Deviation	Industry Average	The Maine Beaches Average	Standard Deviation
Local Community Support	10.2%	10.6%	1%	3.56	3.56	0.76
Hospitality Culture	10.2%	10.5%	1%	3.71	3.35	0.88
Effective Advocacy Program	10.2%	10.4%	2%	3.63	3.21	0.78
Workforce	10.1%	10.3%	2%	3.31	2.10	0.76
Industry Support	9.9%	10.2%	2%	3.81	3.41	0.84
Regional Cooperation	10.0%	10.2%	1%	3.76	3.68	0.81
Economic Development	10.2%	10.1%	2%	3.95	4.08	0.65
Funding Support & Certainty	9.9%	9.7%	2%	3.36	2.99	0.83
Membership Strength & Support	9.6%	9.5%	2%	3.76	3.23	0.86
Effective DMO Governance Model	9.6%	8.5%	2%	3.80	3.01	0.92

<b>COMMUNITY SUPPORT &amp; ENGAGEMENT - The Maine Beaches</b>	<b>3.26</b>
<b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b>	<b>3.60</b>

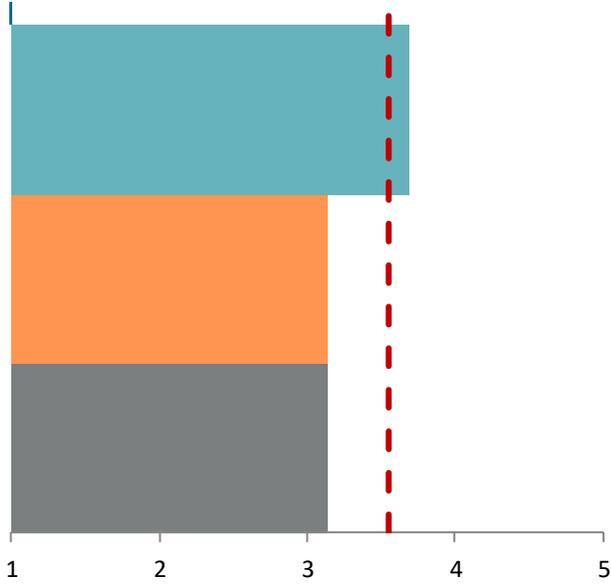
## RESULTING SCENARIO EXPLORERS

**Note**

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

# Local Community Support

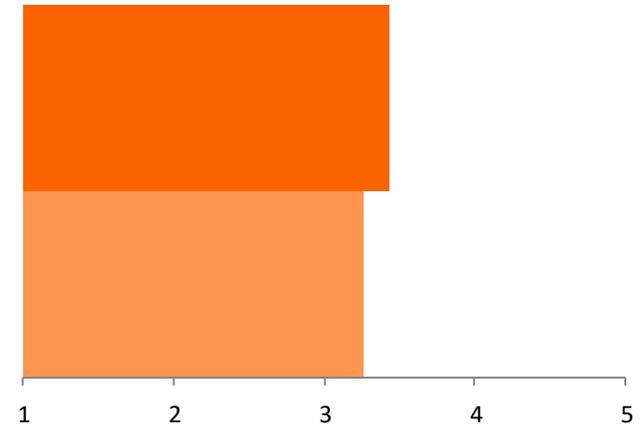
- The region's tourism industry gets positive media coverage
- The region's tourism industry has business support
- Stakeholders are active, engaged and supportive of tourism development



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

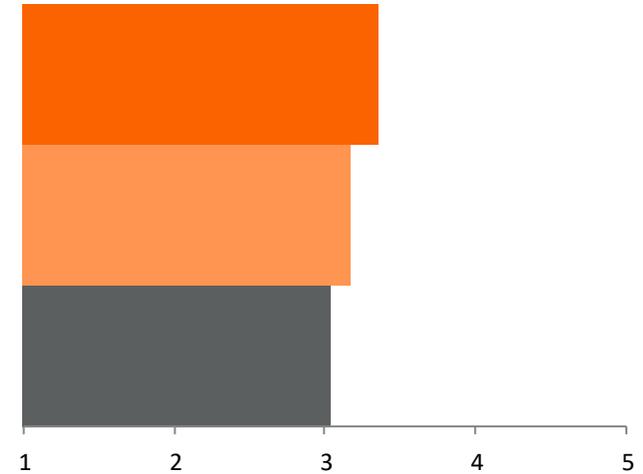
# Hospitality Culture

- 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



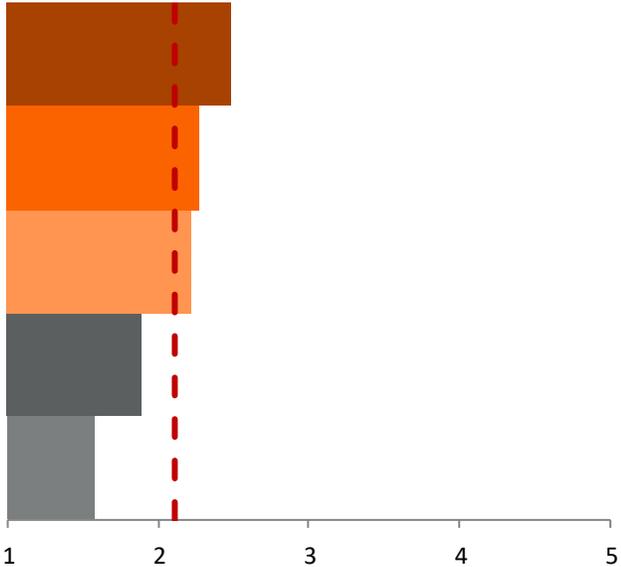
# Effective Advocacy Program

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



# Workforce

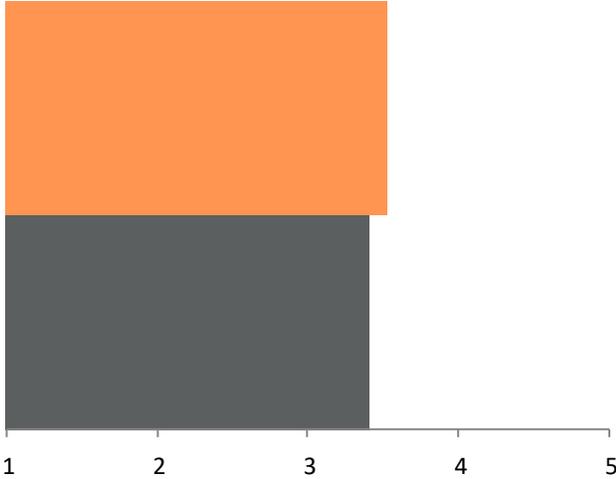
- The region has a strong base of hospitality education programs
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The region’s workforce is stable and has a positive labor relations environment
- The increase in rents and home prices has not affected the industry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

# Industry Support

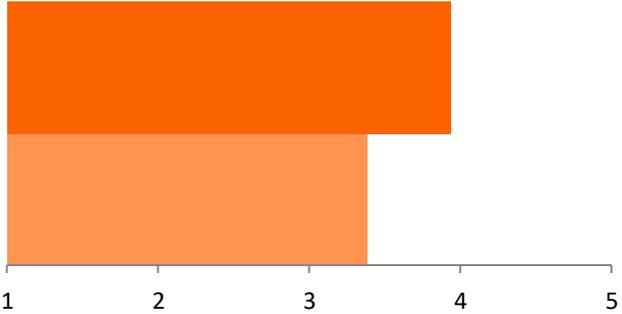
- Tourism industry leaders and stakeholders are supportive of the regional tourism industry
- Tourism industry leaders and stakeholders are investing in activities



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

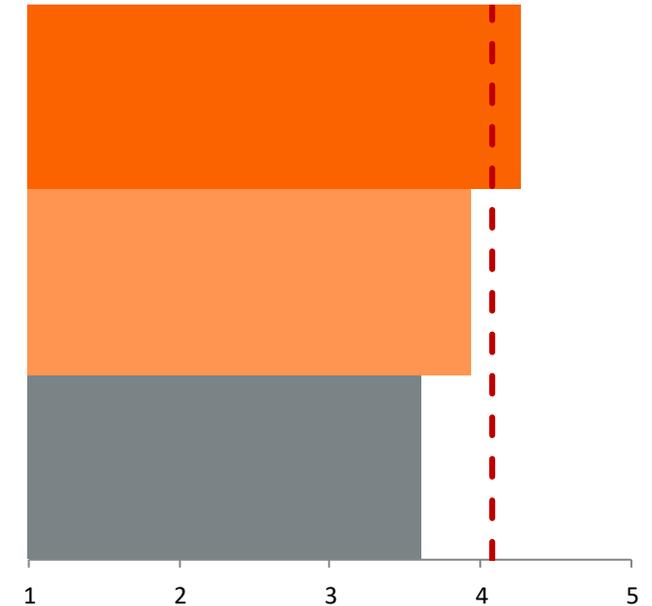
# Regional Cooperation

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



# Economic Development

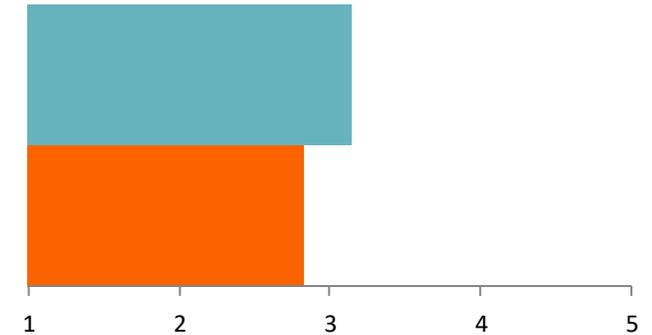
- Tourism is identified as a key economic driver for the region
  
- Tourism industry has a good working relationship with local chambers and/or economic development agencies
  
- Tourism industry plays an important role in our community's economic strategies; including transportation, air service and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



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

# 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**
- **Meeting facilities**
- **Headquarter hotel**
- **Public transportation**
- **Road congestion**
- **Sports venues**
- **Communicating performance and economic impact of tourism to public**
- **Public/lifestyle shows & venues**
- **Wi-Fi , mobile cell coverage**



## Community Support & Engagement Opportunities

- **Local community support**
  - **Business support**
  - **Active, engaged stakeholders**
- **Industry support**
- **Workforce**
- **Funding**

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

## **Transportation Infrastructure (27%)**

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- **Transportation connecting inland and coast and alleviating car traffic**
- **Improve roads through congestion points, such as Ogunquit and Wiscasset**
- **Charter airplanes to local airport from New York City and New Jersey possibly Washington DC. This would ensure weekend stays to Southern Maine all the way to the lakes district in northern Maine at Moosehead**
- **Better roads and more alternative roads, better transportation like trolleys to reduce volume of cars. More road signs indicating where each business is located**

## **Visitor Amenities & Experiential Product Development (13%)**

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- **Ability to build on existing strong identity (long sandy beaches, lighthouses) and diversify to offer a greater variety of "authentic" experiences including those more "off the beaten track" and adventurous**
- **Address erosion, find a way to help the cities see the beaches in Saco as an asset, build a community of beach related businesses**
- **Education of the experience Maine offers. We are called vacationland for a reason**
- **A comprehensive list of tourism activities in the area**

## **Advertising, Marketing, PR & Branding (12%)**

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- **Tying together the coast from Kittery to Portland**
- **Leveraging the online tools to help potential visitors plan a vacation across the region without bouncing between different chamber sites**
- **A greater attempt to draw attention to the Southern Route I Antique Trail ... Significant attraction ... long standing tradition and national known ... open all year round**
- **Advertising that highlights what there is to do in the Sanford area**
- **Lots and lots of advertising to New York City and New Jersey**

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

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

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- The jobs exist in high numbers, we need workers
- Programs to bring willing workers from other states and PR
- Getting seasonal employees through the J1 or H2B programs
- Create coordination to address employment issues.
- Affordable child care
- Affordable housing
- Available workforce growth - more people to hire

## **Planning & Experiential Product Development (9%)**

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- Bringing in strategic planners and business consultants to help industry leaders. Being new to the industry I see a lot of businesses lacking in research and development and just continuing the same old routines and strategies
- Creating more integrative experiences for our guests
- Creation of a special retail/tourism area around the beaches in our area
- Redevelopment of Scarborough Downs
- Creation of a special retail/tourism area around the beaches in our area
- Improvement of town or city infrastructure

## **Attractions, Events, & Entertainment (9%)**

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- Quality Night Life
- Music/food festivals
- Adult Use Cannabis
- Better Outdoor Concert Venues
- Large summer music festivals
- Increasing Attractions

# What are the top tourism issues to address?

## **Transportation Infrastructure (25%)**

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- **Traffic bottlenecks ex. in Wiscasset**
- **Traffic - lack of mass transit promo/options**
- **Transportation - expanding Amtrak service/connections to our towns**
- **Transportation to connect housing with job markets**
- **Affordable transportation for workers who are inland from the coast**
- **Better road infrastructure**
- **Getting between destinations**

## **Workforce Availability & Housing (25%)**

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- **Employment wages are low**
- **Improving the visa program for foreign students**
- **Lack of employment candidates**
- **Lack of affordable housing**
- **Seasonal workforce - no seasonal workforce, no reinvestment - all levels of state must advocate for reliable solution**
- **Workforce development**
- **Work force - low unemployment, shortage, visa shortages**

## **Seasonality & Shoulder Seasons(8%)**

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- **Extending the tourist season**
- **Building up the shoulder seasons for growth**
- **Seasonality vs. making Maine known as a year round destination.**
- **That Southern Maine Beach area is closed during the winter**
- **Seasonal nature of industry**
- **Off-peak visitation**

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

## **Culinary & Micro-Breweries/ Agritourism (24%)**

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- **Craft Beer and Wine**
- **Culinary**
- **Culinary including winery, brewing, distilling**
- **Local farm to table meals**
- **Pick your own flowers, veggies and fruits**
- **Agritourism**
- **Farmstays**

## **Nature, Wellness & Eco-Tourism (15%)**

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- **Birders/eco-tourists**
- **Mindful travel - healthy, chance to unplug**
- **New National Park area**
- **Outdoor adventures**
- **Getting off the grid**
- **Leaf peepers**
- **Wellness**

## **Niche Tourism Markets (9%)**

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- **Cruise passengers**
- **Volunteer tourism**
- **Niche markets (filmgoers, hikers/bikers)**
- **Marijuana Tourism**
- **Luxury tourism**
- **City destinations**
- **Car-free travelers**

# Engagement

Consider that every minute of the day:

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





# Transformational Opportunities



## #1: Broadcast to Engagement

Interacting with & leveraging the new marketplace



## #2: Brand Building

Building & protecting the destination brand



## #3: Collaboration & Partnerships

Evolving the DMO business model

# Thank You!

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