

DESTINATION NEXT

Maine Statewide Assessment

April 3, 2018



Paul Ouimet

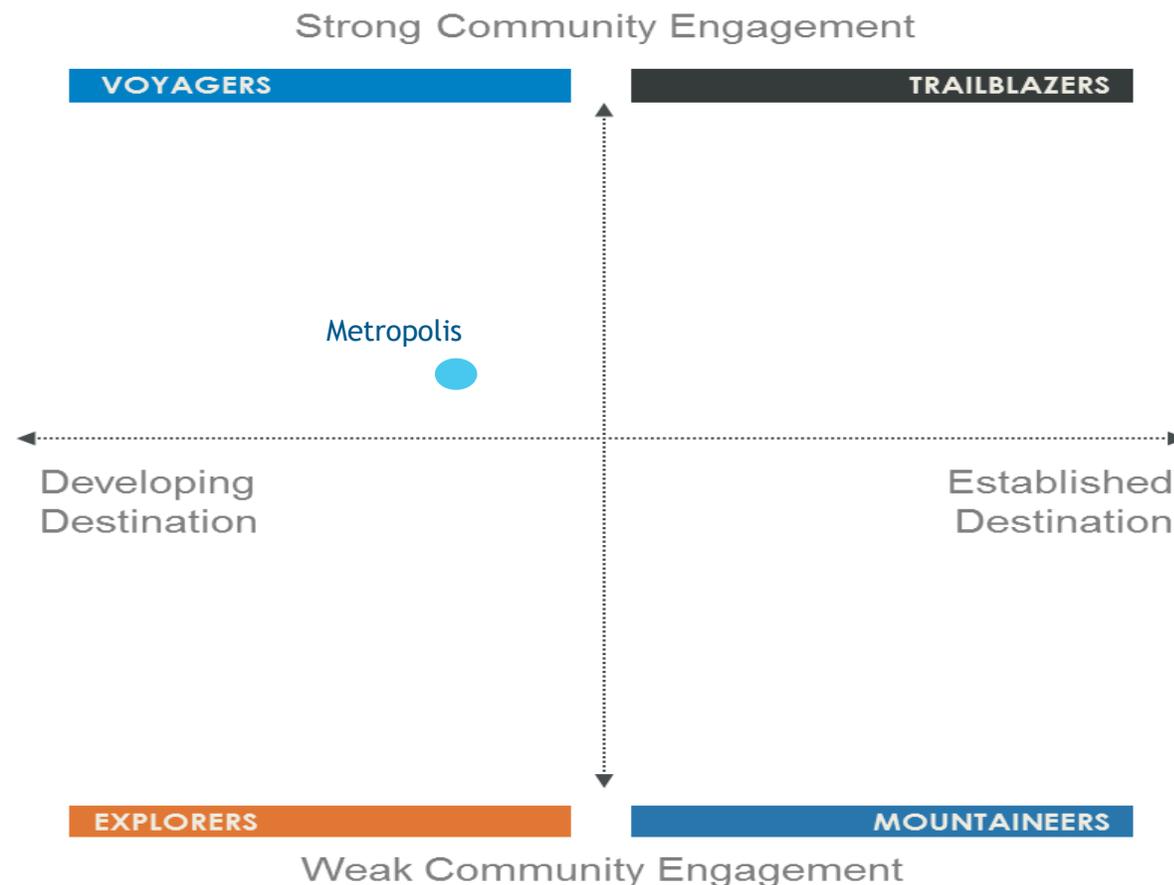
Scenario Model



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



154

detailed
assessments
completed in 11
countries



50

underway or
planned,
including 4 other
countries



65

in discussions,
including
14 other countries

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

Dominican Republic, El
Salvador, Ecuador,
South Africa

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

Destinations Completed – International



Regional Assessments



DESTINATION NEXT

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

March 29, 2018



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

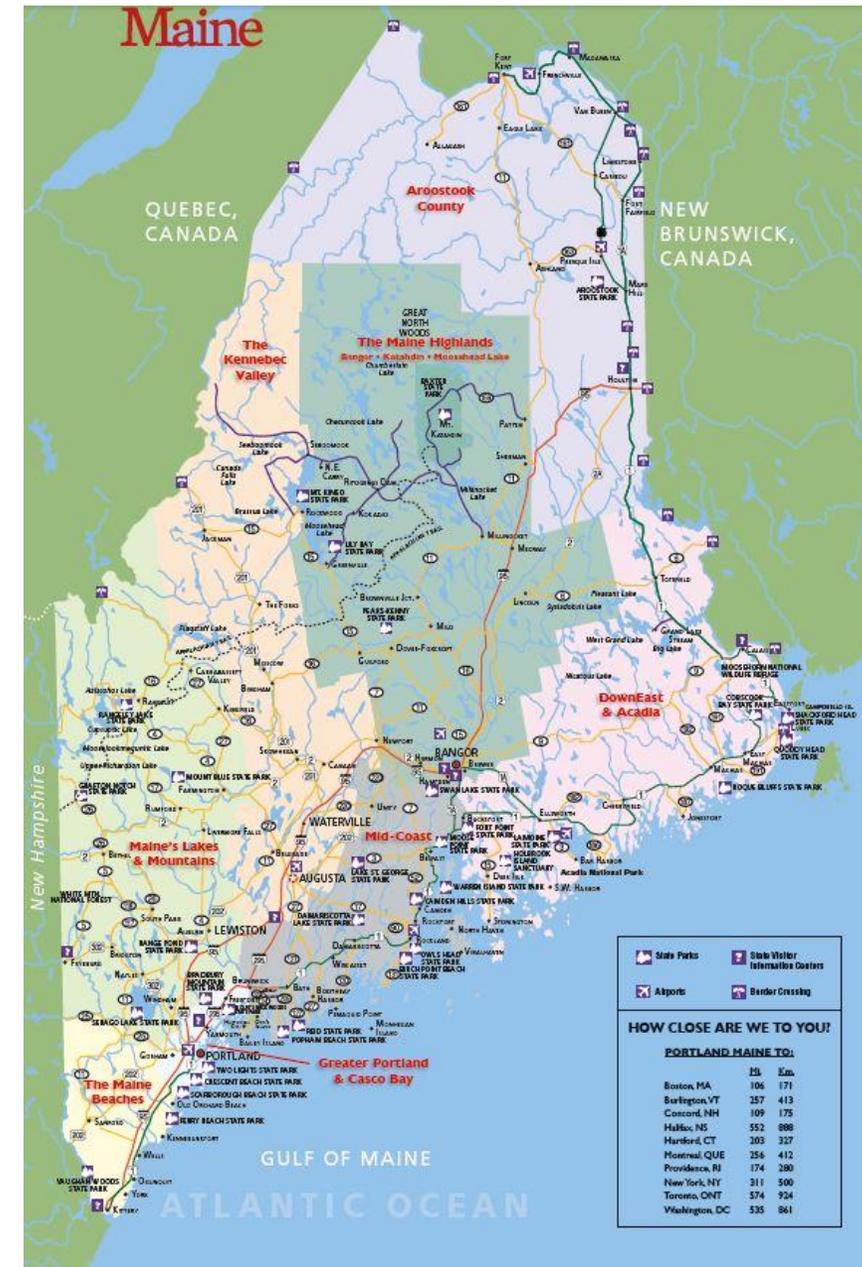
- **Machias: Downeast & Acadia**
- **Ellsworth: Downeast & Acadia**

October 18

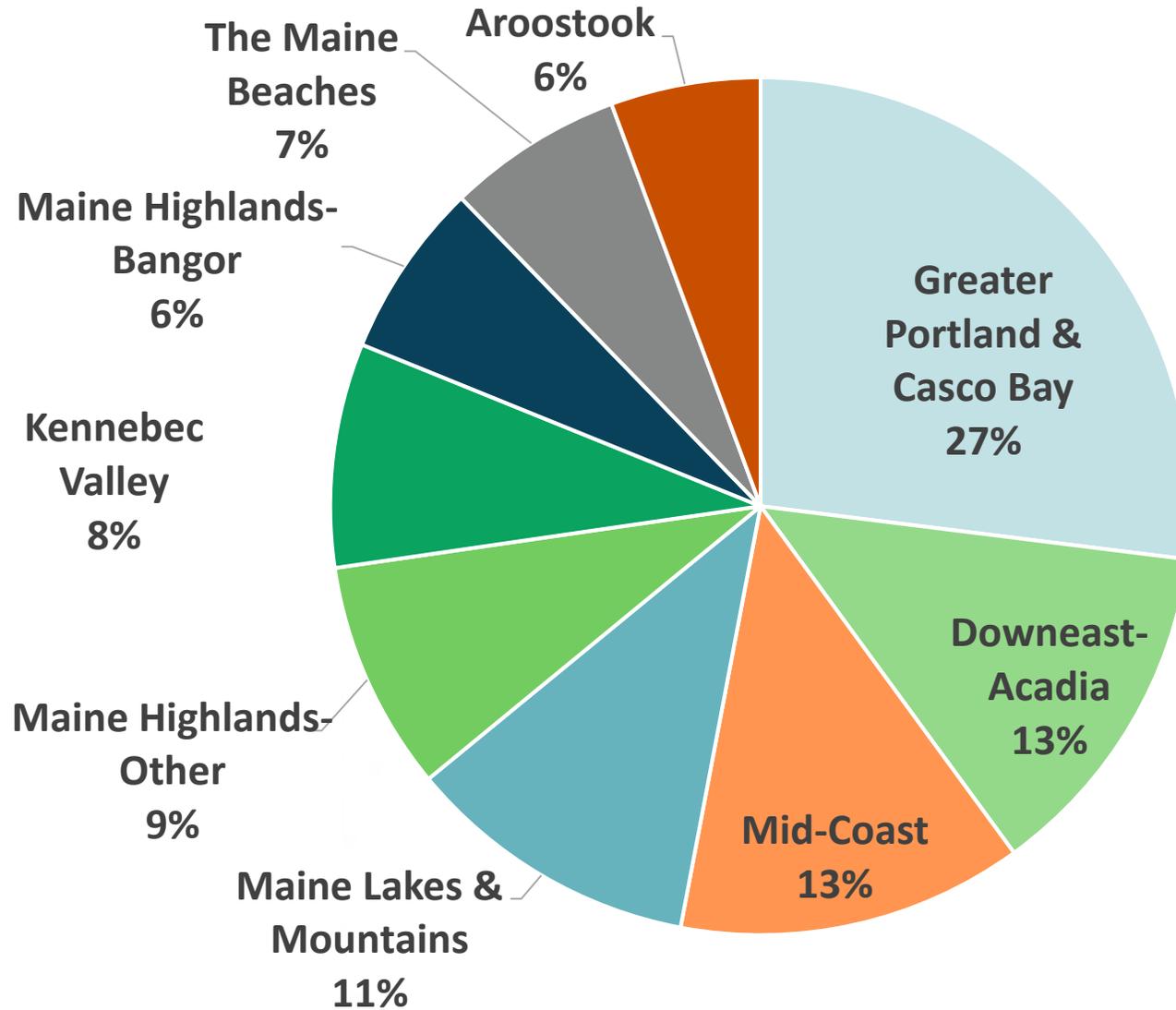
- **Rockland: Maine Mid-Coast and Islands**

October 19

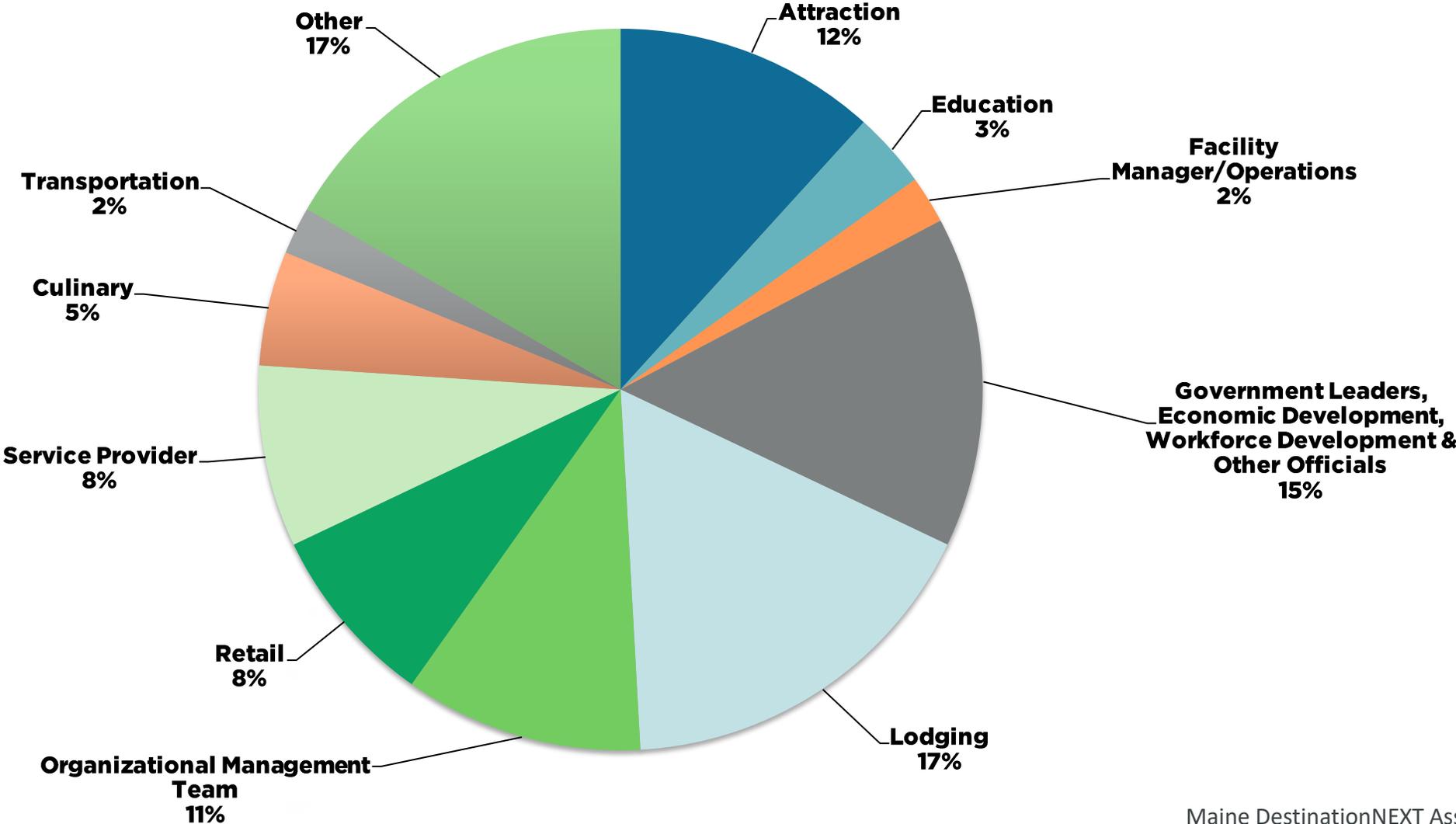
- **Biddeford: The Maine Beaches**



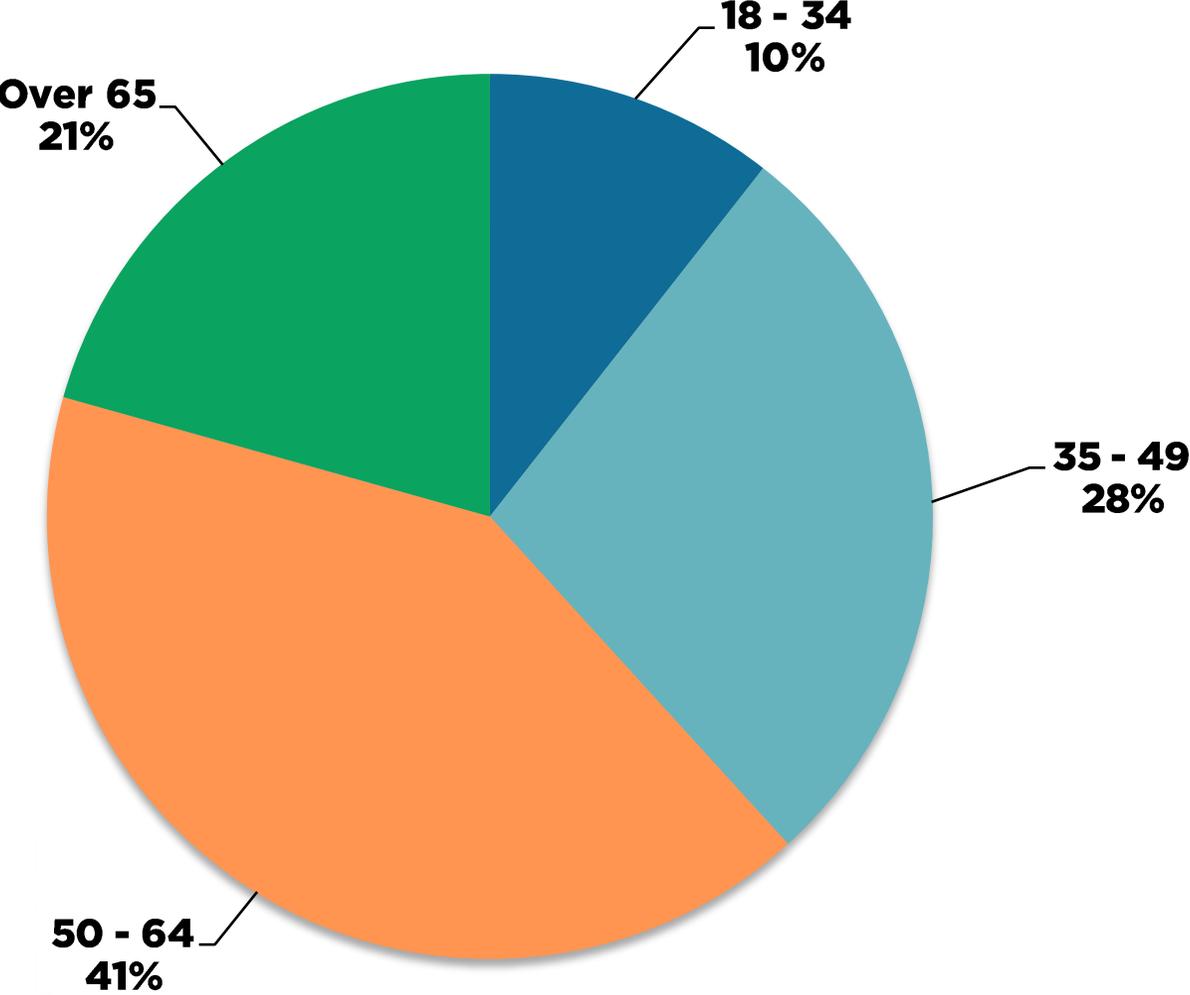
1,033 Responses - by Region



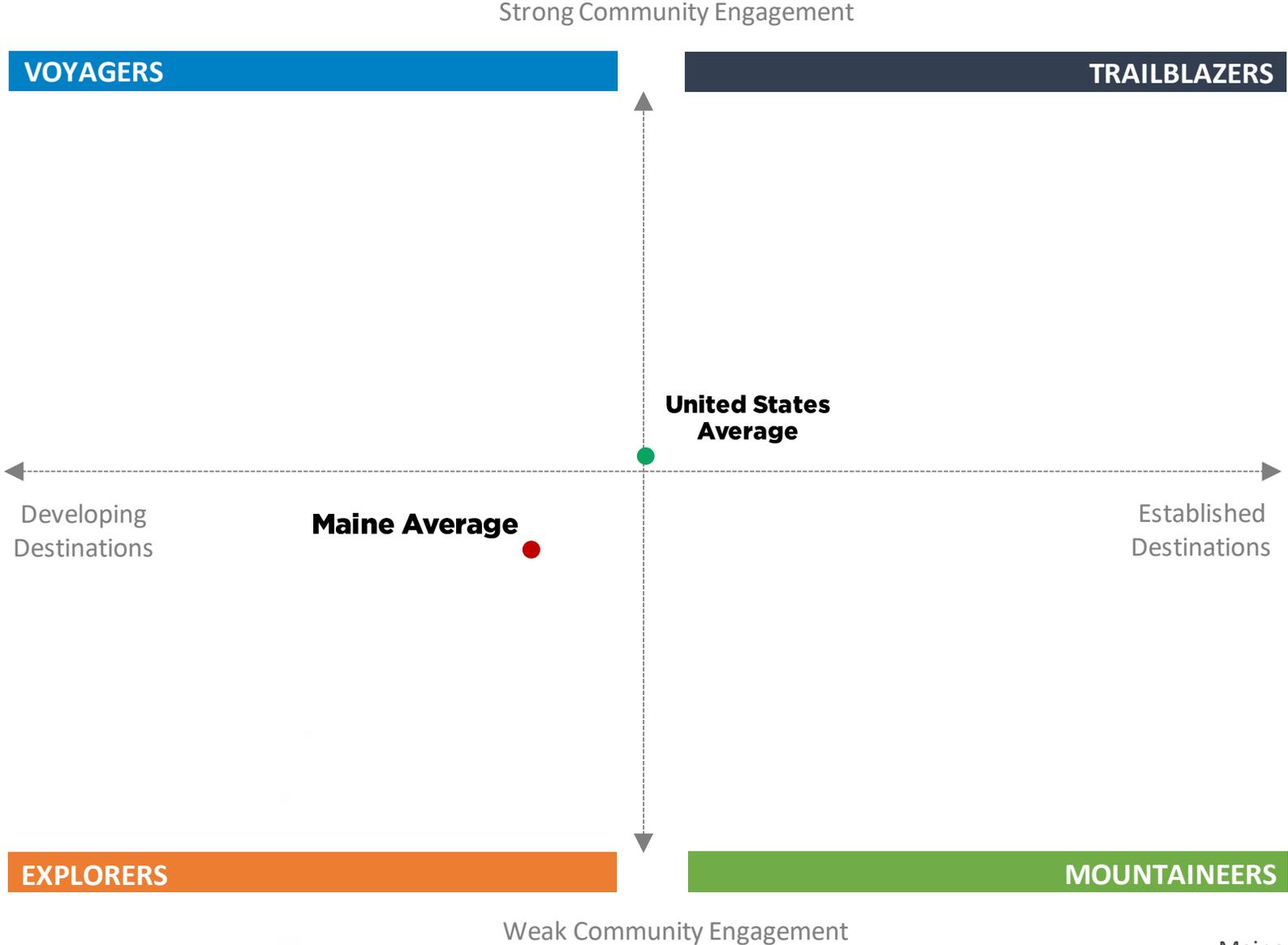
1,033 Responses – By Stakeholder



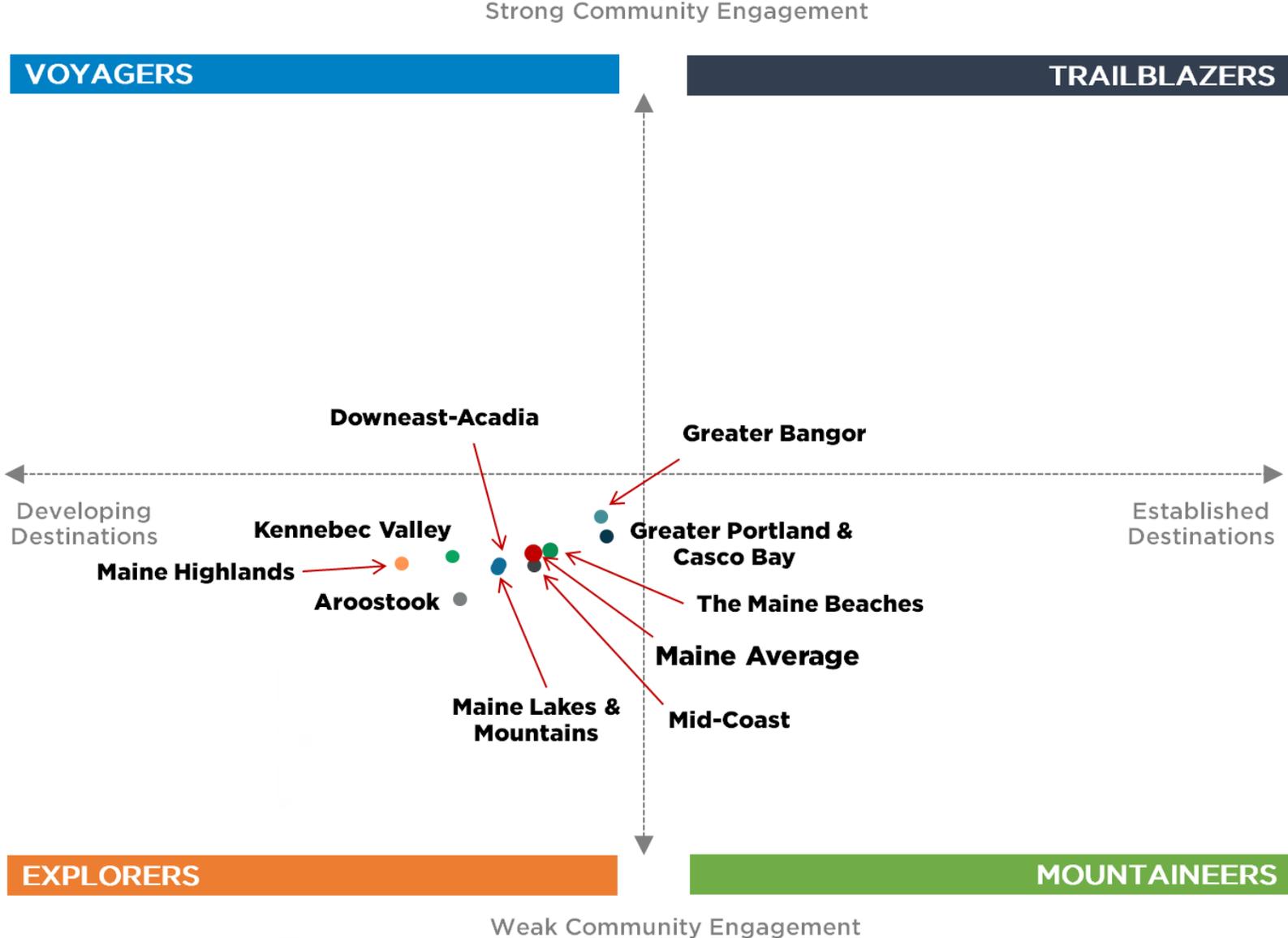
Age Demographic



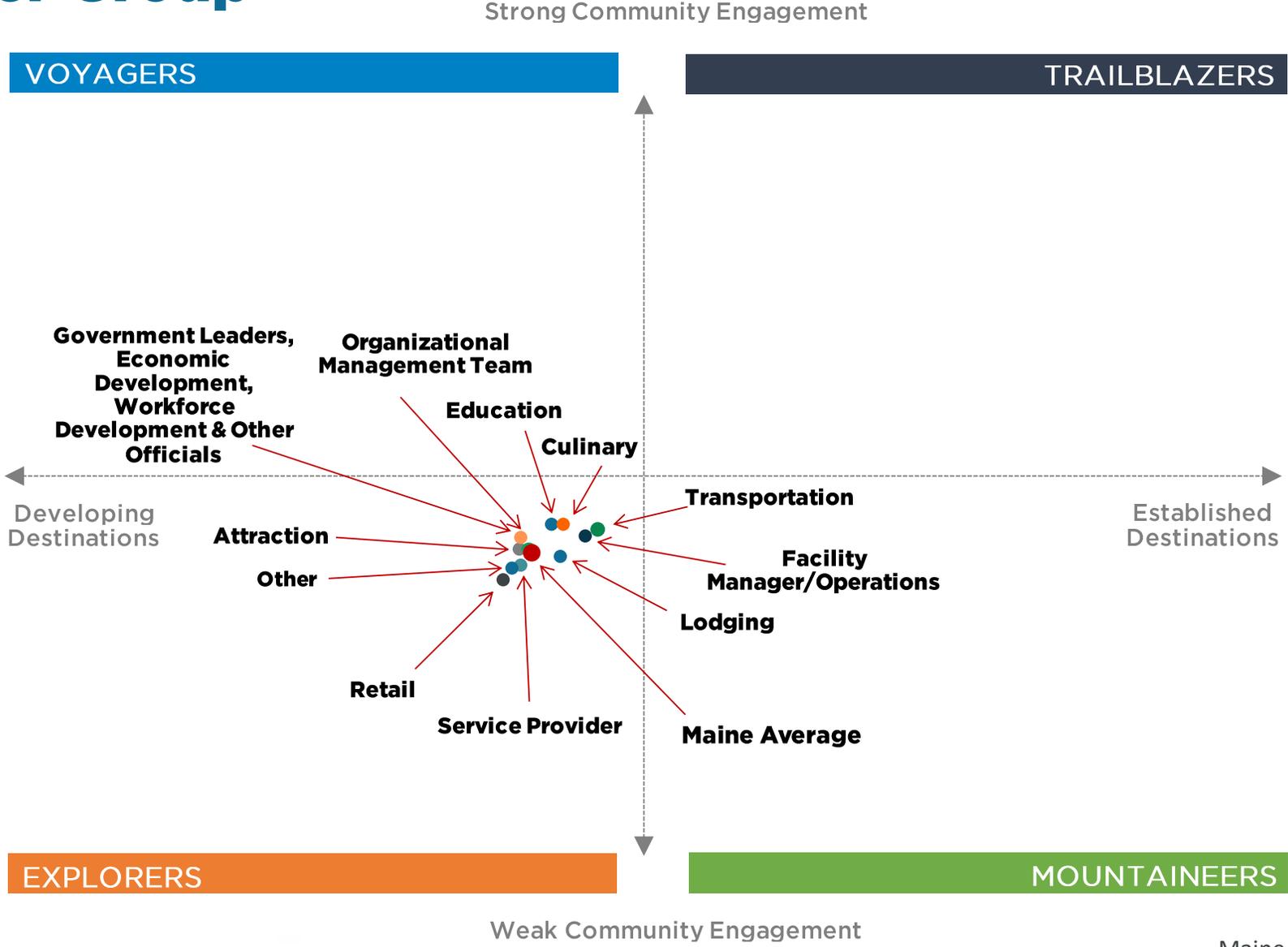
State of Maine Overall Assessment - Industry



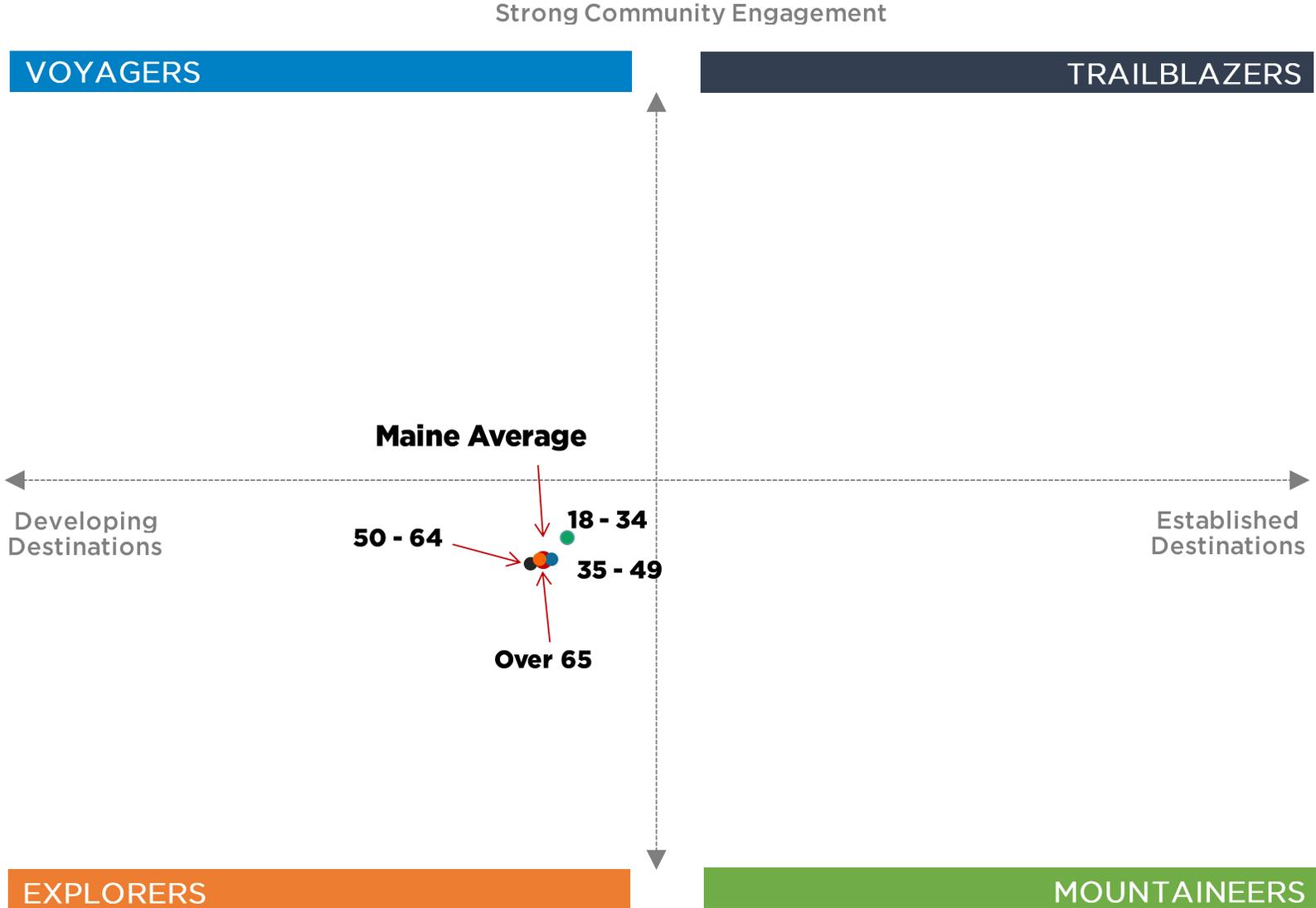
State of Maine Overall Assessment – Regions



State of Maine Overall Assessment – Stakeholder Group



State of Maine Overall Assessment - Age



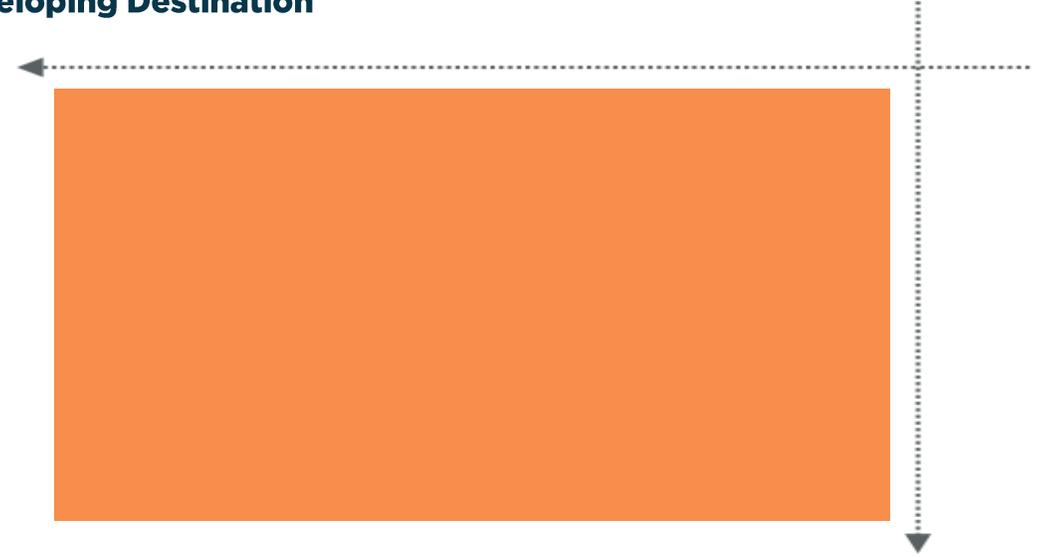
Explorers

These DO'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

Destination Strength Rankings – Global Averages



		Relative Importance	Perceived Performance
	Brand	1 st	7 th
	Destination Performance	2 nd	1 st
	Attractions & Entertainment	3 rd	3 rd
	Accommodation	4 th	4 th

Destination Strength Rankings – State of Maine



	Relative Importance	Perceived Performance
 Convention & Meeting Facilities	1 st	10 th
 Accommodation	2 nd	7 th
 Attractions & Entertainment	3 rd	1 st
 Mobility & Access	4 th	9 th

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

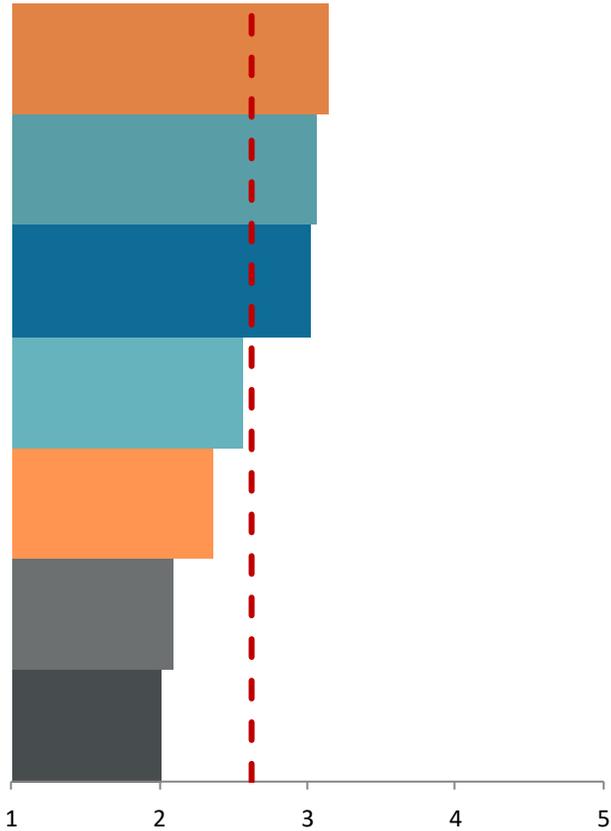
Green shading signifies that the region outperformed the destination average by greater than 0.2.

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.

Convention & Meeting Facilities

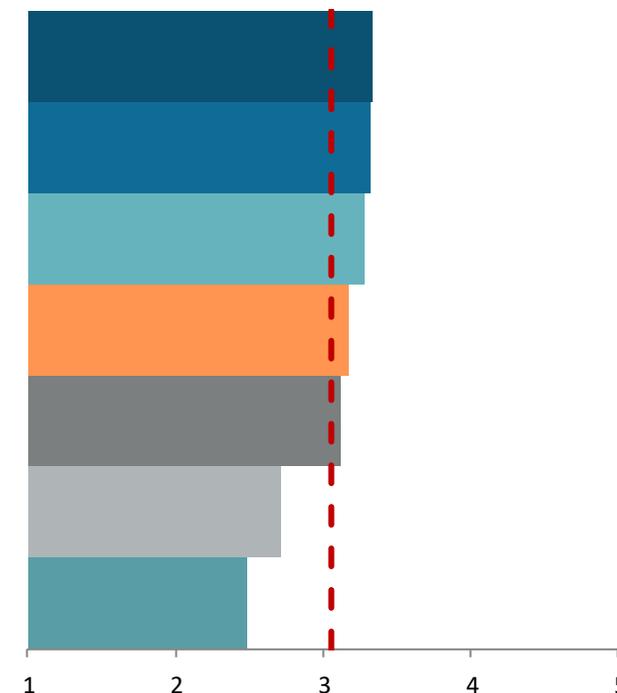
- Where possible, hotels/other meeting venues take full advantage of the views
- Has good, unique off-site venues for special events
- The addition of a convention center in Southern Maine would improve the destination
- Offers an abundance of professional and experienced convention and/or meeting services 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

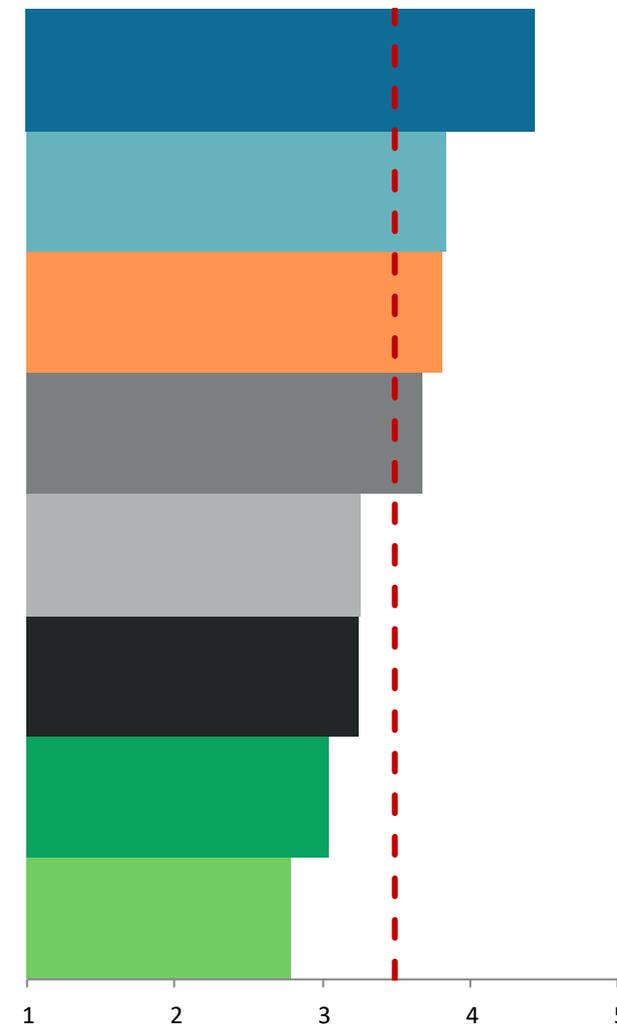
- The location and proximity of accommodation options in the region meets visitor needs
- Has adequate hotel accommodations capacity
- Offers a diversity of accommodation price options
- Has adequate shared economy accommodations capacity (e.g. airbnb, VRBO)
- Has a healthy presence of well-known brand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



Note
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Attractions & Entertainment

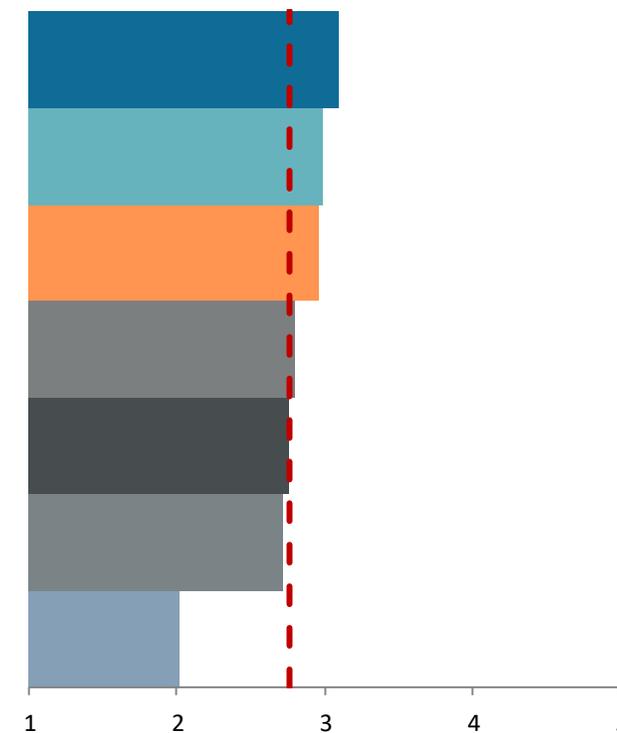
- Offers a wide diversity of outdoor recreation options for hiking, biking, paddling, etc.
- Has unique and high-quality dining options
- Has an assortment of authentic and unique attractions and entertainment opportunities (e.g. Historic Sites, Museums, Cultural Attractions)
- Has high-quality and wide-ranging arts and 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
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Mobility & Access

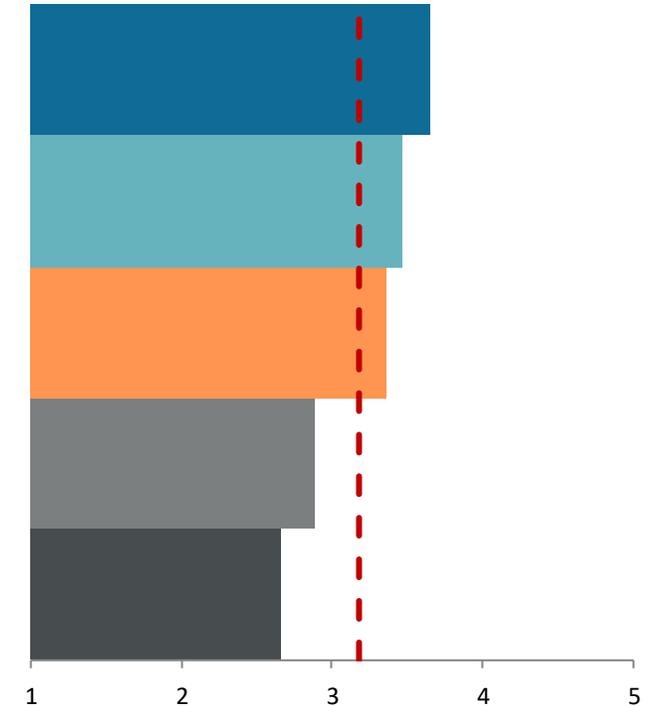
- Has adequate water access that makes it easy for visitors to get around
- Has great directional signage and highways that make it easy to get around
- There are a number of sufficient and visible information centers available to tourists
- Roads can easily handle residents, businesses and visitor traffic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



Note
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Destination Performance

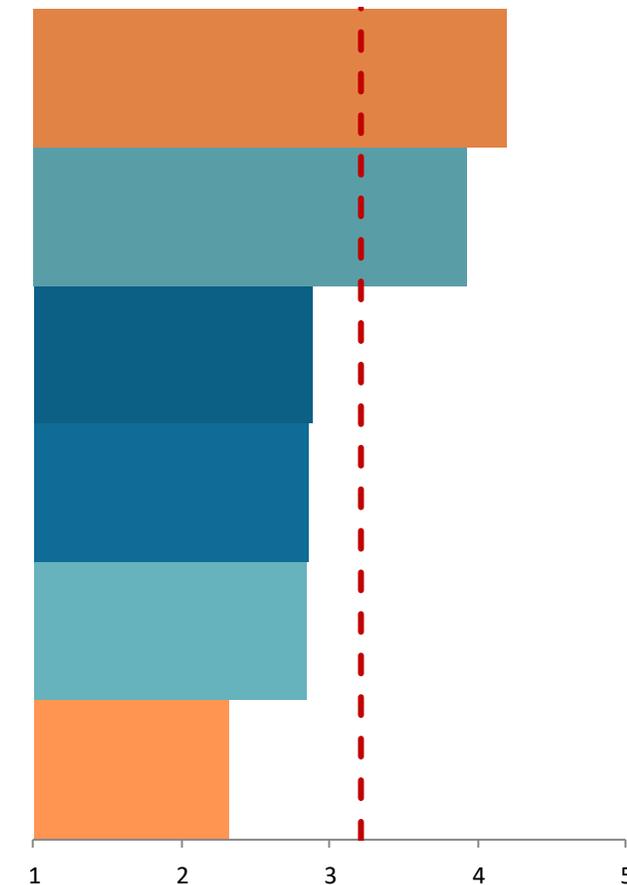
- Is experiencing a positive growth in overnight visitation
- Hotels are performing well (e.g. Occupancy, RevPAR)
- Tourism industry performance is adequately measured and tracked
- The tourism industry does a good job at communicating the performance and economic impact to the public
- Is successfully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



Note
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Sports & Recreation Facilities

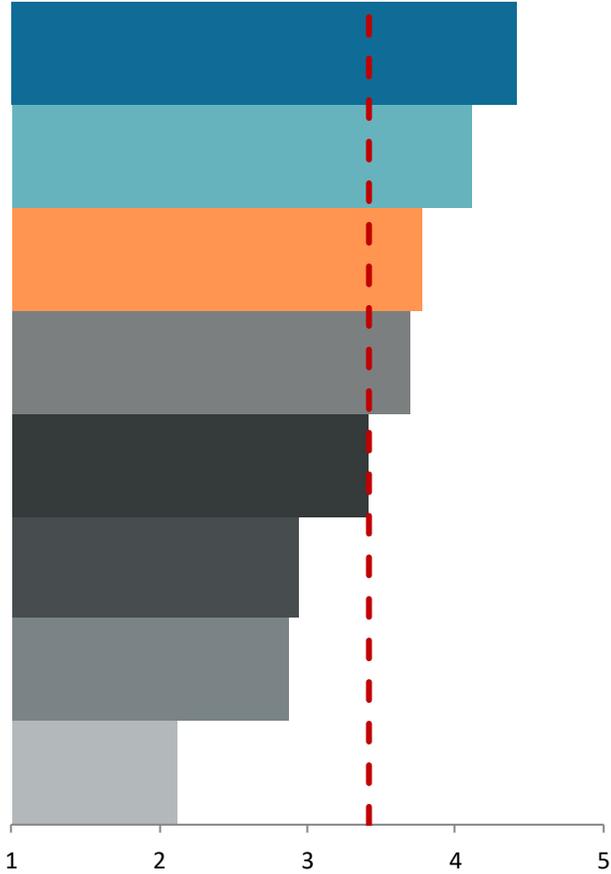
- Has lakes and rivers to support good fishing and vast wooded areas to support hunting activities
- Has adequate trail systems for snowmobiling, skiing, hiking and/or ATVing
- Leadership representing sports and recreational facilities are engaged and helpful in pursuing recreational and sporting events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



Note
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Brand

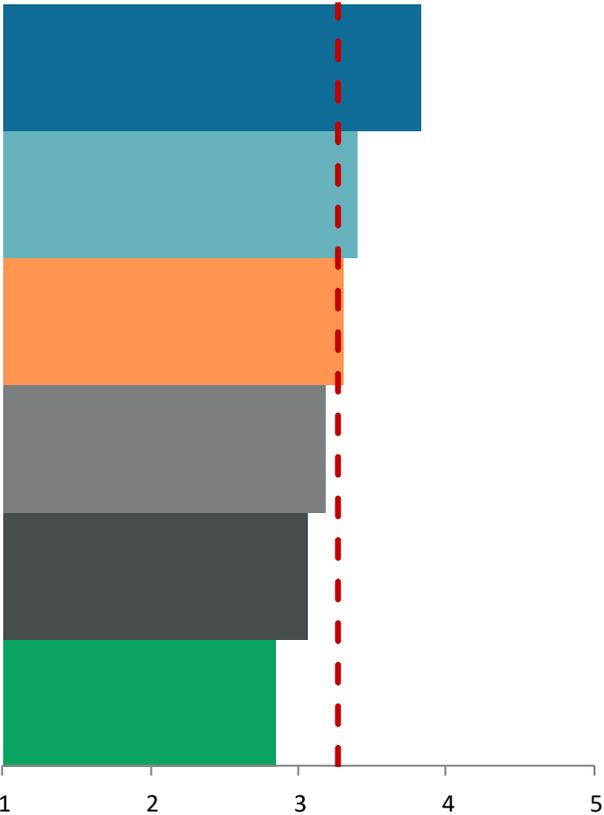
- Is known as being a healthy place for outdoor activities
- Is known for being safe, clean, and secure for visitors
- Is known for having a lot of things to see and do
- Is known for being environmentally conscious and sustainable
- Appeals to a diverse range of visitors
- Has an effective region-wide marketing message
- Panhandling does not affect the experience of the destination
- Is prepared for international tourism with adequate translations and guides



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

Events

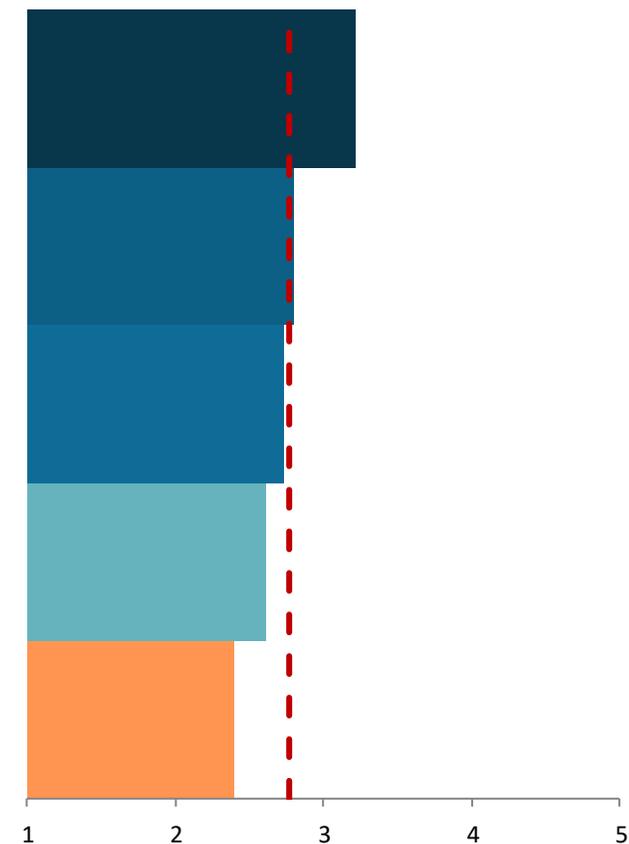
- Has an abundance of parks and outdoor spaces for handling special events
- Offers major events that attract non-local visitors
- The citizens of the region are supportive of hosting major sporting/national or international events
- Government is cooperative and supportive in attracting and hosting major events
- 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

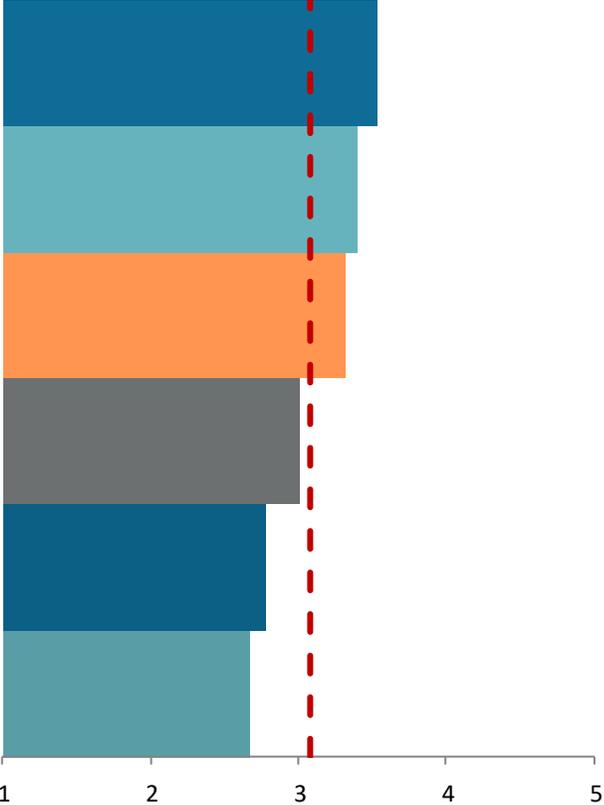
- Tourism industry uses and leverages social media to support the brand and market
- There is substantial Wi-Fi access in region's meeting/convention facilities
- Businesses have access to good broadband capacity to be able to run their businesses effectively
- There is reliable mobile phone service 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.

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 – Global Averages



Relative Importance

Perceived Performance



Funding Support & Certainty

1st

10th



Industry Support

2nd

3rd



Effective Destination Organization Governance Model

3rd

2nd



Local Community Support

4th

4th

Community Support & Engagement – State of Maine



Relative Importance

Perceived Performance



Local Community Support

1st

3rd



Industry Support

2nd

2nd



Hospitality Culture

3rd

4th



Regional Cooperation

4th

5th

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.
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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

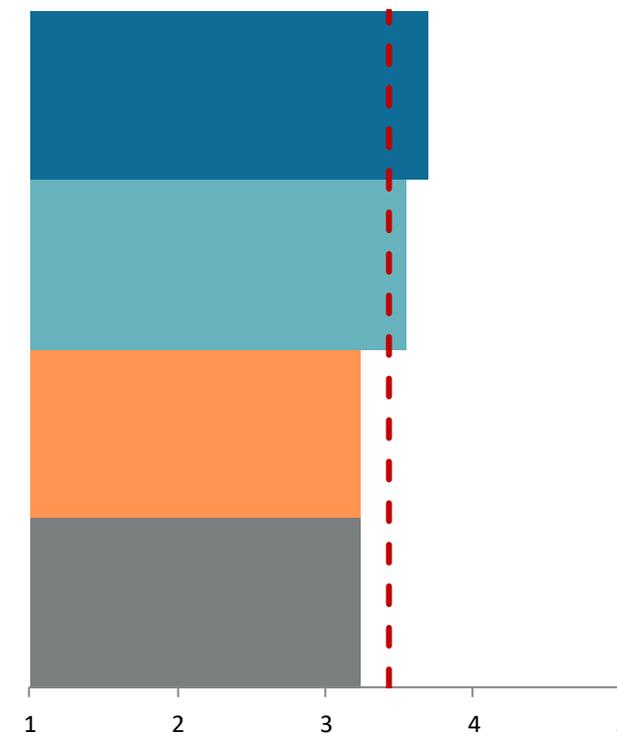
EXPLORERS

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Local Community Support

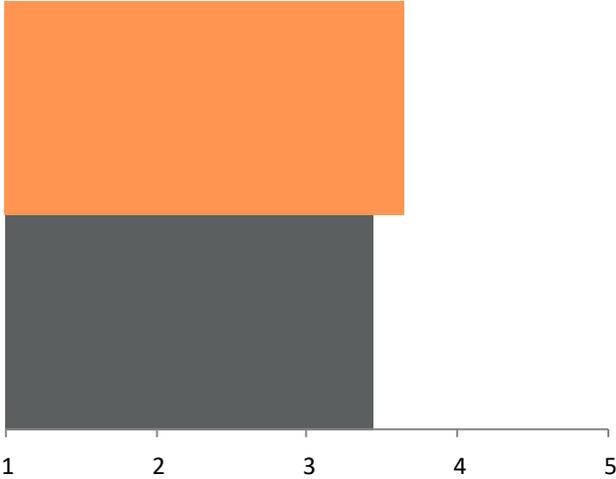
- The region's tourism industry has business support
- The region's tourism industry gets positive media coverage
- Local community in the region have a general understanding and positive perception of the region's tourism industry
- Stakeholders find value in partnerships that include other tourism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



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

Industry Support

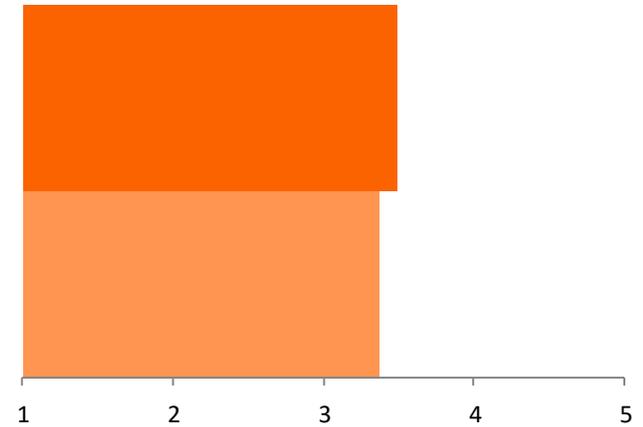
- Tourism industry leaders and stakeholders are supportive of the regional tourism industry
- Tourism industry leaders and stakeholders are investing in activities



Note
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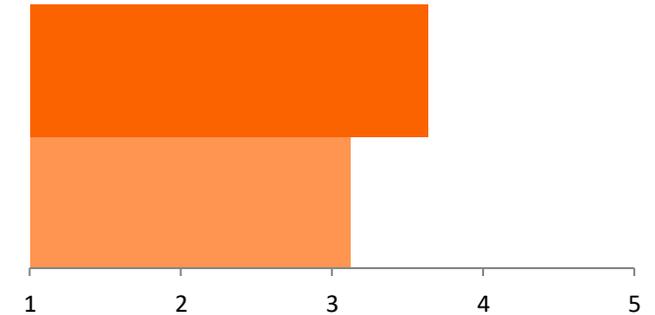
Hospitality Culture

- 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



Regional Cooperation

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

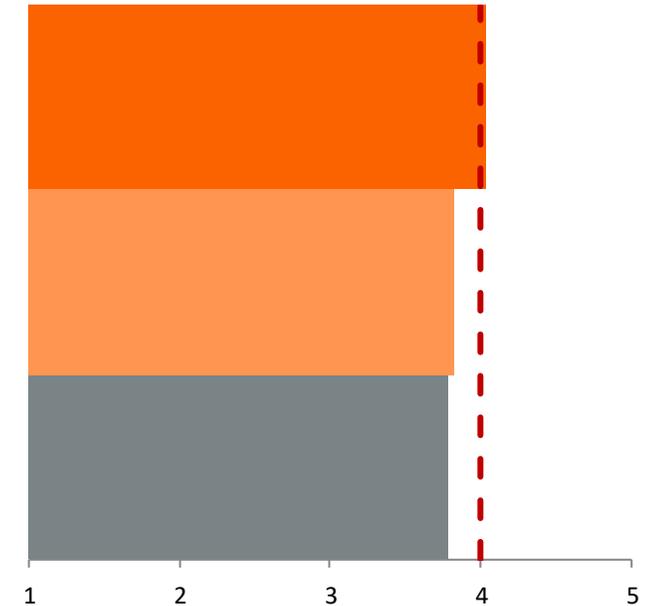


Economic Development

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

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

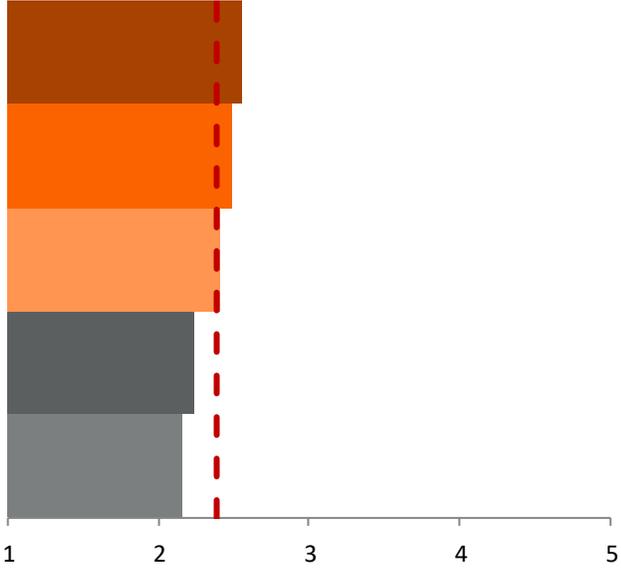
- Tourism industry has a good working relationship with local chambers and/or economic development agencies



Note
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Workforce

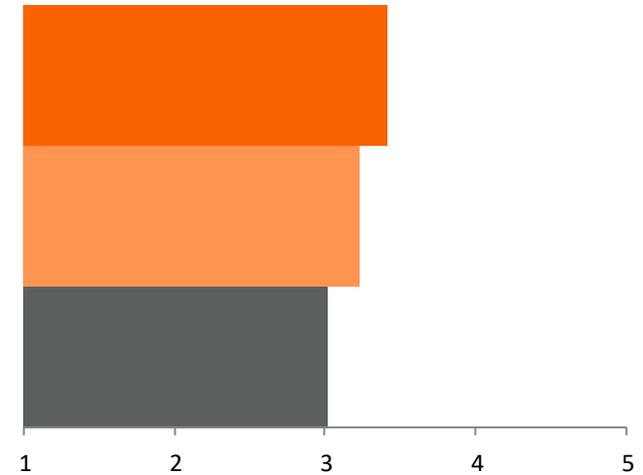
- The region has a strong base of hospitality education programs
- The region’s workforce is stable and has a positive labor relations environment
- The region’s hospitality industry is able to attract and retain a high-quality workforce
- The increase in rents and home prices has not affected the industry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



Note
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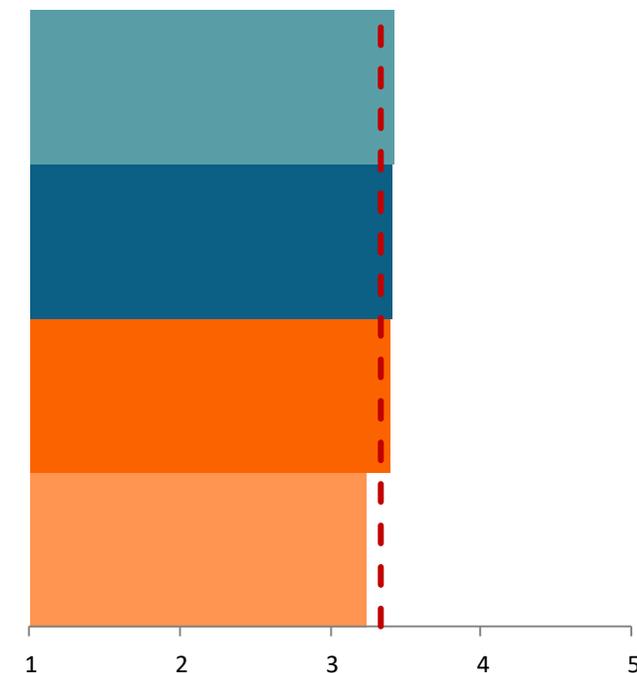
Effective Advocacy Program

- 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

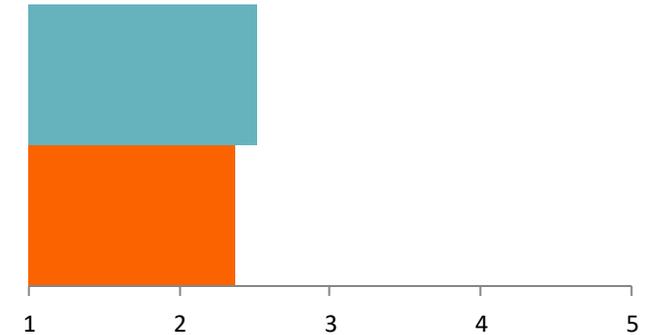
- Stakeholders are active, engaged and supportive of tourism development
- Stakeholders are active, engaged and supportive of tourism marketing
- Stakeholders find value in region-wide partnerships
- Stakeholders find value in partnerships that include other tourism regions



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

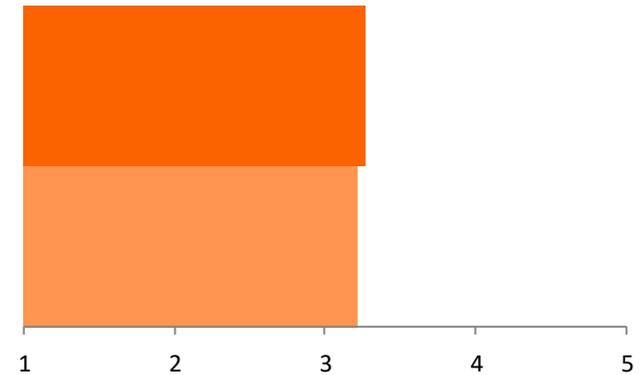
Funding Support & Certainty

- 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 strong alignment among stakeholder and age groups on perceptions of the destination



Destination Opportunities

- Meeting facilities
- Lodging capacity
- Shopping
- Iconic attractions
- Public transportation
- Mobility
- Sports & recreation facilities
- International tourism readiness
- Region-wide marketing
- Event venues
- Wi-Fi access
- Cell coverage
- Air access



Community Support & Engagement Opportunities

- Local support
- Hospitality culture
- Regional collaboration
- Workforce
- Advocacy
- Funding

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



What are the top three tourism issues to address?

1. Transportation
2. Advertising & marketing
3. Workforce

Issues	Aroostook	Downeast -Acadia	Highlands -Greater Bangor	Highlands -Other	Greater Portland & Casco Bay	Kennebec Valley	Mid- Coast	Maine Lakes & Mountains	The Maine Beaches
Advertising & Marketing	✓	✓	✓	✓		✓	✓	✓	
Accommodations	✓			✓					
Planning & Experiential Product Development				✓	✓	✓		✓	
Transportation	✓	✓	✓		✓	✓	✓	✓	✓
Workforce		✓	✓		✓		✓		✓
Seasonality/Shoulder Seasons									✓

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	✓	✓					✓		

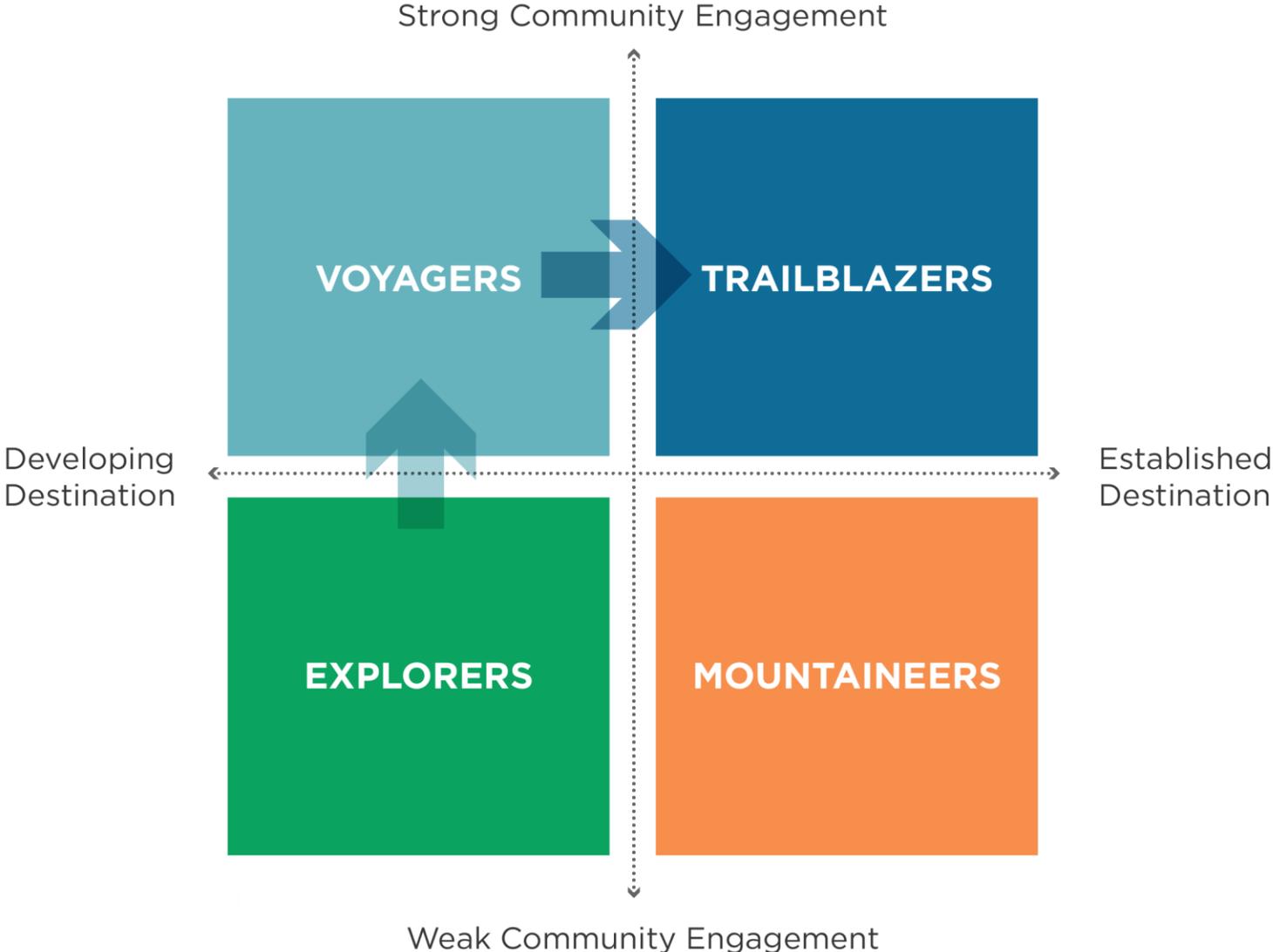
Regional Workshops

June 4-8

1. Present DestinationNEXT assessment results
2. Discuss best practices
3. Key action items



Becoming a Trailblazer



Thank You!

paul.ouimet@nextfactorinc.com



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