



# FUTURE OF TOURISM - THE MAINE WOODS

## PART 1: EMERGING TRENDS

A foresight research report examining emerging tourism trends and how they might influence destination development in the Maine Woods Region.



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This report has been prepared by Future iQ as part of the destination development work for the region.



November 2018

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## FOREWORD

In early 2018, the Maine Woods Consortium contracted with Future iQ to produce two reports to help inform Destination Development across the Maine Woods region.

Future iQ's reports, including this one, are aimed to help provide critical insight to the Consortium and other Maine Woods stakeholders as they work to position the Maine Woods region as a compelling destination for visitors, businesses, and new residents. The reports are:

- **Future of Tourism: The Maine Woods - Part 1: Emerging Trends.** This includes an outline of key travel and activity trends that will influence visitation to the Maine Woods in the future and related destination development activities.
- **Future of Tourism: The Maine Woods - Part 2: Potential Scenarios.** This covers the scenario analysis conducted by in the region in 2018 and begins to assess the potential economic and social impacts of Rural Destination Development as well as potential gaps and opportunities for the region.

These reports represent Future iQ's perspective and insight and provide a valuable resource for the region as it considers future tourism development. They are intended to help stimulate discussion about how best to build a sustainable tourism industry that helps drive local economic benefit.

The Maine Woods Consortium is a network of non-profit organizations, businesses, and state agencies dedicated to advancing a "triple bottom line" approach to enhancing human and environmental well-being in the Maine Woods region. Consortium partners are working to build economic vitality in the Maine Woods through development of a network of Rural Destination Areas where recreational and cultural amenities, hospitality services, transportation infrastructure, dynamic events, and vibrant downtowns attract visitors, businesses and new residents. A robust and sustainable visitor economy will complement the region's forest products economy to build strong rural communities across the Maine Woods.

For more information visit [www.mainewoodconsortium.org](http://www.mainewoodconsortium.org) and [www.future-iq.com](http://www.future-iq.com)

David Beurle  
CEO, Future iQ

November 2018

Consortium partners are working to build economic vitality in the Maine Woods through the development of a network of high quality Rural Destination Areas.







How can the Maine Woods utilize destination tourism as a method of economic development for the region?

The Maine Woods has abundant assets which appeal to a range of tourism markets. Unlocking the potential of these assets will require investment in destination and strategic market development.

## 1.0 INTRODUCTION

The Maine Woods Region has abundant natural assets, parks, conservation areas and outdoor recreation activities. The region includes a wide range of unique landscapes that create a huge outdoor recreation canvas. From a visitor perspective, this creates an incredibly exciting and enticing nature-based destination.

The Maine Woods region already supports a multi-billion dollar tourism industry, attracting over 14 million visitors per year. Without question, this region has the potential to substantially increase its tourism industry, and attract more international affluent travelers. The region is in relatively close proximity to large urban population concentrations, and the Maine Coast is already a well-developed destination.

The Future of Tourism - The Maine Woods explores a range of global, national and state-wide trends that are most applicable to the region. The tourism industry is changing rapidly, driven by macro drivers that are reshaping travelers, and the desired travel experience. Understanding these trends will help the region best identify and target new visitors, and help define the best product development strategies.

This foresight study explores trends in a number of categories, including:

- Changing global demographics and impact on traveler profiles
- Technology and its impact in tourism
- Macro trends in Nature-Based tourism, including the emergence of a focus on sustainability
- Changing Tourist profile and the implications for product development and service
- Outdoor activities and how these play to the region's advantages
- Experiential activities and how these can create new entrepreneurial opportunities

This study is intended to provide a resource for planning, as regional groups contemplate how the nature-based tourism industry can be further developed in the region. The trends would suggest that the region offers well suited destinations. Being able to create the right visitor experience is key. These must be built on high quality service and superior products. Tourism is already a major economic driver, and powered by the emerging trends, has the potential to contribute significantly more to the local economy.





How ready is the Maine Woods region for a rapid change in the origin of visitors? How do we prepare to be ready for new kinds of tourists?

The growing size and spending power of the middle class in different parts of the world is resulting in a change in the numbers of tourists and origin of visitors.

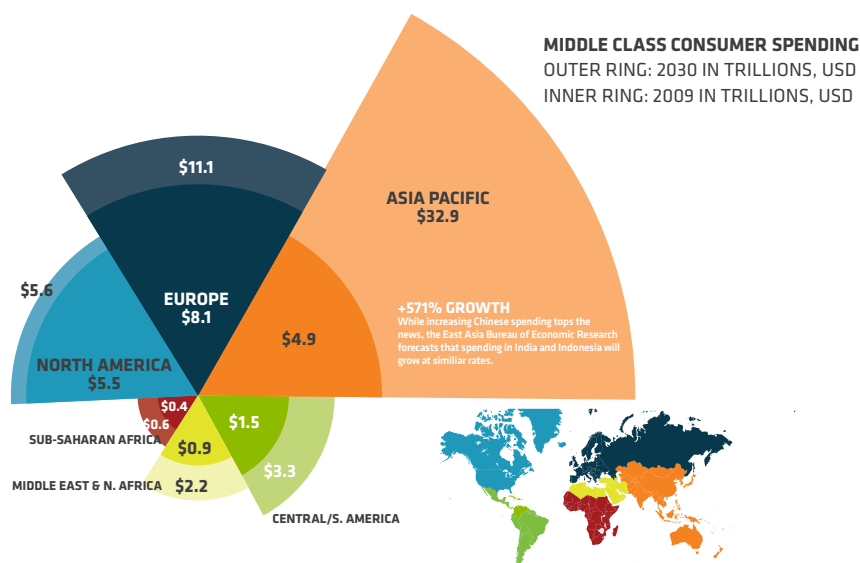
## 2.0 MACRO TRENDS IMPACTING TRAVEL AND TOURISM

When exploring the Future of Tourism for the Maine Woods region, consideration should be given to the macro trends that are reshaping the global tourism industry. These trends are being driven by larger external trends and evolutions in society. This section explores several macro trends that will impact all aspects of the tourism industry.

### 2.1 GROWING GLOBAL MIDDLE CLASS CONSUMER SPENDING

The domestic travel market continues to be the largest share of the tourism market in the United States, however international markets are critical to developing a strong tourism industry. Both the domestic and international tourism markets are expected to continue to grow, providing an important source of economic development in the U.S. Combining the information on existing visitor markets with global and national tourism trends will help determine how to optimally develop the local tourism industry.

There is currently massive growth of global middle class spending occurring, especially in Asia. Between 2009 and 2030, it is expected that middle class spending in the Asia Pacific region will increase by nearly 600% and increase by approximately USD \$28 trillion. This is significant, as increasing middle class spending power equates to increasing disposable income. This results in more tourism travel.



Source: Kou, L. 2013. The world's middle class will number 5 billion by 2030. Quartz. Figures based on OECD, 2012. An emerging middle class.





How do we prepare to be ready for new kinds of tourists looking for new experiences?

## 2.2 INCREASING NUMBERS OF TOURISTS FROM ASIA

A growing middle class in Asia is already creating a noticeable shift in international travelers. Europe is and will likely remain, the largest overseas market for visitors to the U.S., however its market share is decreasing (from 50 percent in 2008, to a projected 36 percent in 2020). The largest growing market is Asia with its share projected to continue to increase moving from 24 percent in 2008 to a projected 34 percent in 2020. China is the most notable increased market from the 22nd-largest overseas source market in 2000, to the third-largest in 2016, and second-largest (projected) in 2020 (US Travel Association, 2016).

This shift will require tourism destination regions to consider new types of services and experiences. The Maine Woods region has the capacity to respond to this shift, as it has a wide variety of existing tourism experiences and destinations.

VISITATION TO THE U.S. BY WORLD REGION						
	Share of overseas arrivals			U.S. arrivals, thousands		
	2008	2016	2020	2008	2016	2020
<b>Europe</b>	50.4%	39.2%	36.4%	12,783	14,724	15,319
<b>Asia</b>	24.4%	30.2%	33.8%	6,179	11,347	14,247
<b>Oceania</b>	3.4%	4.4%	4.1%	852	1,656	1,730
<b>Latin America &amp; Caribbean</b>	17.9%	21.3%	21.6%	4,531	8,023	9,108
<b>Middle East</b>	2.7%	3.5%	3.0%	681	1,297	1,266
<b>Africa</b>	1.2%	1.4%	1.4%	315	543	571
<b>Total Overseas</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>25,341</b>	<b>37,589</b>	<b>42,126</b>

Source: U.S. Department of Commerce and Oxford Economics

Source: Fact Sheet: International Inbound Travel to the US (2016), US Travel Association.

The Maine Woods region is heavily dependent on 'local' domestic visitors. Future success will require the region being able to attract and serve international visitors, who will have different expectations and needs.







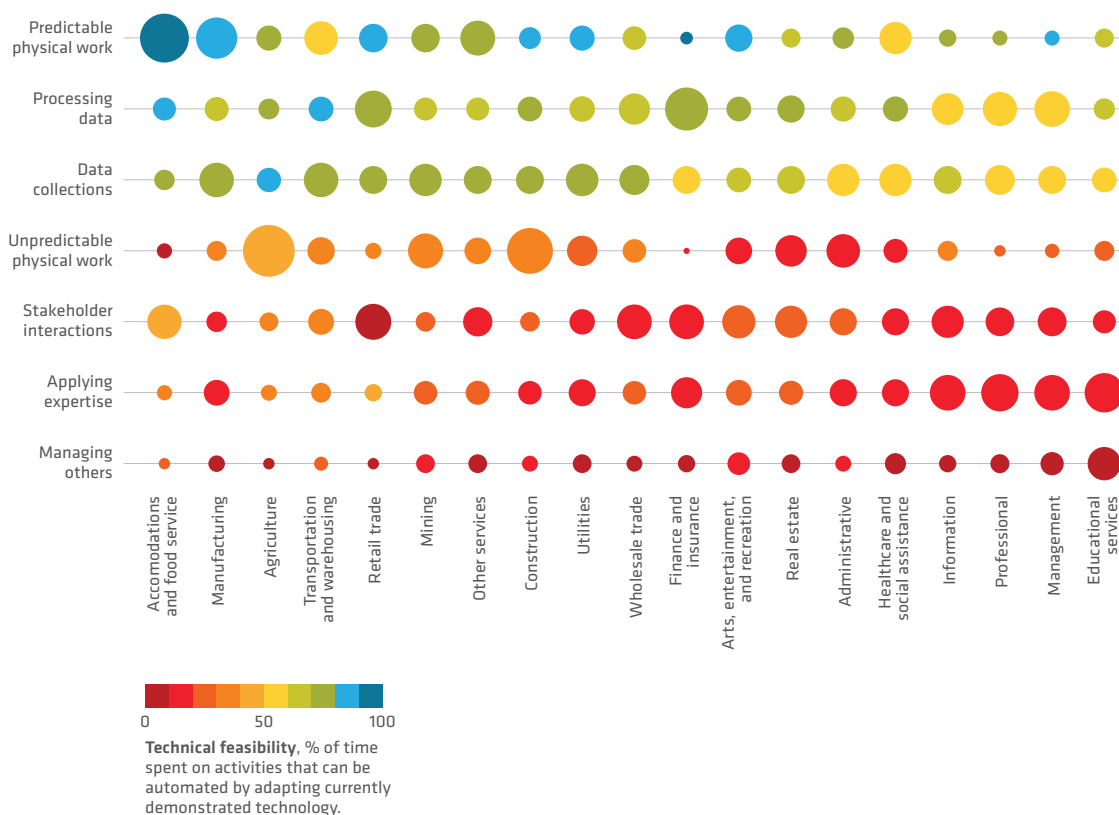
How does the Maine Woods retain a balance between rustic charm and natural experiences, and remain relevant and connected in an increasingly technologically driven world?

Technological change is reshaping all industries at an unprecedented rate. Tourism will be no exception, with innovation in travel, connectivity and how people capture and promote travel experiences.

## 2.3 SPEED AND SCALE OF TECHNOLOGICAL CHANGE

The technological innovations developing in the Next Industrial Revolution are being implemented globally at all scales, thereby changing the face of industries and society in a rapid and profound way. Technological development and adoption is increasing in speed, reaching an exponential rate of change, and affecting almost all industries in all countries. Manufacturing is at the forefront of this transformation, but other industries are also quickly developing such as communications, health care, biomedical research, infrastructure, energy, transportation, shipping and logistics, food services, hospitality, financial services, and retail.

Technology is reshaping the global tourism industry, from how people communicate, to how they travel and recreate. Importantly, technology will change how visitors are served and transported. Jobs in the Accommodation and Food Services sector are among the most ripe for automation.



Source: *Where Machines could replace humans – and where they can't* by Michael Chui, James Manyika, and Mehdi Miremadi, McKinsey Quarterly 2016.



How can technology be best leveraged to promote the Maine Woods region as a world class destination to tech savvy NextGen travelers?

Connecting Maine Woods destination development activities to technological advances will help engage visitors with excellent local product offerings.

## 2.4 IMPACT OF TECHNOLOGY ON TOURISM

Tourists of all ages are embracing technology for researching, booking, reviewing, navigating, and sharing their travel experiences. Access to technology on vacation also allows people to check in with work while away, providing flexibility and the ability to spend more time away. At its best, technology can provide convenience and enhance the travel experience, at its worst, it can be a distraction and detract from the travelling experience.



Source: *The evolving needs of NextGen travelers shape travel technology. 2014. Amadeus IT Group.*

Engaging with increasingly technology connected tourist markets will be critical for the Maine Woods to utilize the tourism industry as an economic development opportunity.

"The number one benefit of information technology is that it empowers people to do what they want to do. It lets people be creative. It lets people be productive. It lets people learn things they didn't think they could learn before, and so in a sense it is all about potential."

– Steve Ballmer, Former CEO of Microsoft (2000-2014)





## 2.4.1 SOCIAL MEDIA

Social media platforms such as Facebook, Instagram, Twitter, Snapchat, etc. are used by a diverse range of tourists. 29% of all US travellers (and 57% of US Millennial travellers) post photos and updates on social media networks hourly or daily while on vacation.<sup>1</sup> Social media also has a profound influence on the purchasing decisions, particularly for younger travelers, including asking for opinions of friends before choosing a destination and making travel decisions based on others posts.<sup>2</sup>

How can Maine Woods best use social media platforms to build a global following of current and potential visitors?



Social media is utilized by visitors for research and decision making, sharing experiences, and engaging in the local culture.

## INFLUENCE



52% of Facebook users said their friends' photos inspired their holiday choice and travel plans



48%

Social media has a huge influence on travel bookings. Of those who used social media to research travel plans, only 48% stuck with their original plans



33%

Changed their hotel



7%

Changed destination



10%

Changed resorts



5%

Changed airlines

Source: *The Impact of Social Media Within The Hospitality Industry*. [www.four-pillars.co.uk](http://www.four-pillars.co.uk)

Actively and effectively engaging in social media is essential to capture the attention of modern travelers, from tech saavy baby boomers to constantly connected millennials.







What does the Maine Woods region need to develop as mobile platforms for visitors?

## 2.4.2 MOBILE PLATFORMS AND APPLICATIONS

87% of travelers utilize websites for booking travel, and an increasing number of travelers are shifting from computers to booking through mobile devices. Flights, transportation, and accommodation are commonly booked online, and more travelers are engaging in the sharing economy to book accommodation (Airbnb, VRBO, Homeaway) and ground transportation (Uber, Lyft, and Blablacar). Increasingly, apps are being developed for dining, including reservations, deliveries, and meal sharing (EatWith, BonAppetour and Feastly), as well as booking activities and tours. Mobile apps are becoming common to connect directly with major service providers and online travel agencies (e.g. airlines, Expedia, TripAdvisor) and newer apps being developed to aggregate services from smaller providers (Get Your Guide, Vayable, ToursByLocals and VoomaGo), so that travelers can compare options and book directly with local businesses.<sup>3</sup> Additionally, sites and apps are being created to connect travelers with social impact travel experiences (e.g. visit.org, Lokal, Passion Passport).

**85%**

of leisure travellers use their smartphone while abroad



**29%**

of travellers have used mobile apps to find flight deals

**MOBILE**



**30%**

of travellers have used mobile apps to find hotel deals

An increasing number of bookings are being made by mobile device. Connecting Maine Woods products to these services will open up markets for tourism service providers.

Source: *The Impact of Social Media Within The Hospitality Industry*. [www.four-pillars.co.uk](http://www.four-pillars.co.uk)

Mobile tourism brands are continuing to grow, creating a digital transformation. Customers can plan an entire trip with their phone; they can research and book activities and transportation, check in, order meals, unlock room doors, and stay connected with friends and family through their mobile device.<sup>4</sup>



How can the Maine Woods build a trusted and enticing online profile?

### 2.4.3 PEER REVIEWS

Online review sites such as Yelp and TripAdvisor, as well as social media platforms, are a key opportunity to connect with potential customers. Travelers see real-world feedback from travelers that are similar to themselves as a way to help book the experiences they want.<sup>5</sup> Reviews have a significant influence on travel decisions. For example, 81% of travelers find user reviews important, and 49% of travel shoppers won't book a hotel without reviews.<sup>6</sup> The ability to both book and share opinions instantly means that quality service is imperative, as is online reputation management for tourism service providers.<sup>7</sup>



## TRUST

**72%**

of consumers say they trust earned media, such as word-of-mouth and recommendations from friends and family, above all other forms of advertising.



**70%**

of global consumers say online consumer reviews are the second most trusted form of advertising

Travelers often check for and rely on reviews for airlines, accommodation, dining and activities to make booking decisions.

Source: *The Impact of Social Media Within The Hospitality Industry*. [www.four-pillars.co.uk](http://www.four-pillars.co.uk)

Interacting online with customers and encouraging them to post about their experiences is important to ensure that a tourism business' online profile is active and current.

“The critic leaves at curtain fall To find, in starting to review it, He scarcely saw the play at all For starting to review it.”

– E.B. White, American Writer





How can the Maine Woods region focus destination development to maximize the potential for economic development from tourism?

Trends in visitor activities and technology have the potential to improve the tourism industry in the Maine Woods if the region is able to respond and position itself accordingly.

## 2.5 EMERGING TRENDS IMPACTING NATURE-BASED TOURISM

The general trend in visitor activities is an increased focus on experiences and facilitated activities. The following are key emergent trends in visitor activities that are relevant to the Maine Woods:

- **Experiential Tourism** - Visitors seek an engaged and authentic learning experience in the arts, heritage, or special character of a place.
- **Culinary Tourism** - One of the most dynamic and creative segments of tourism today, \$12 billion is spent directly on culinary activities while traveling, and 88% of destinations consider gastronomy strategic in defining their brand and image.<sup>8</sup>
- **Active Adventures** - The value of the global outbound adventure travel sector was more than \$345 billion in 2012, while growth in adventure travel has accelerated at a 65 percent yearly rate since 2009. More importantly, nearly 54% of travelers are planning an adventure activity on their next trip.<sup>9</sup>
- **Shopping Tourism** - approximately one-third of total tourism expenditures are spent on retail purchases, including add-on opportunities at an attraction / destination, general shopping experiences, and to experience local culture.<sup>10</sup>
- **Collaborative Consumption** - The growth of consumer sharing applications such as Airbnb and Uber has been exponential in the last few years. With growth expected to continue the sharing economy is branching into other areas of the tourism industry.
- **Mobile Connectivity** - online research, booking and sharing information is increasing, and there is also a shift towards using mobile devices and apps for these activities.
- **Sustainability** - travelers are increasingly making decisions based on the impact of tourism on the local environment, cultures, and communities.

*“To travel is to live.”*

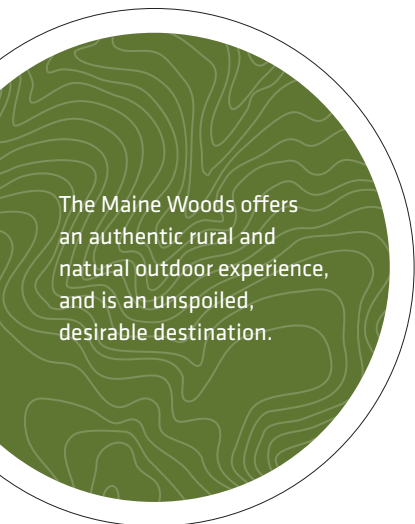
*- Hans Christian Andersen, Danish Author*







How can the Maine Woods enhance the experience for travelers?  
What new product development would enrich this experience?



The Maine Woods offers an authentic rural and natural outdoor experience, and is an unspoiled, desirable destination.

## 2.5.1 EXPERIENCE-BASED TRAVEL

There is an overall trend towards authentic, experiential travelling, where “travelling is now more about rejuvenation, adventure, fulfilment, learning new skills and ‘being more of who you are’ than just ticking off places and things and flopping in the sun.”<sup>11</sup> It is about meeting people and experiencing culture, food, place, and nature, it’s what you do and who you experience it with.<sup>12</sup>

Tourism is increasing globally, and as currently popular locations face increased pressure and overuse, a shift is expected in many tourists’ attention to alternative areas and sites that may be less famous but offer unspoiled, authentic experiences. This represents a micro-tourism trend of people exploring people; a slow tourism, more intimate and experiential.<sup>13</sup>

Trekksort<sup>14</sup> looked at the most booked activities and tours, and, of the 7 experiences expected to drive the most bookings, 5 occur in the Maine Woods:

- Recharging deep in nature
- The one-off experience you can’t get elsewhere
- Sustainable adventure travel
- A slightly crazy story to take home
- Thrills in a stunning location

These experiences already exist in the Maine Woods region. The key will be regional destination development to make them easy to discover and access, and for visitors to be able book multiple experiences.

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“See the world. It’s more fantastic than any dream made or paid for in factories. Ask for no guarantees, ask for no security.”

– Ray Bradbury, *Author, Fahrenheit 451*





How can destination tourism protect the rural and natural character of the region, and benefit from Maine's working forest culture?

In the Maine Woods, ecotourism activities could also include learning about and observing working forests, and appreciating the region's wood products.

## 2.5.2 ECOTOURISM

Eco-tourism is defined as "responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education" (The International Ecotourism Society).

Visitors focused on ecotourism primarily engage in outdoor activities including walking and hiking, wildlife/bird viewing, visiting parks, archaeological sites, and culture and communities. Many are also interested in giving back through volunteer activities.

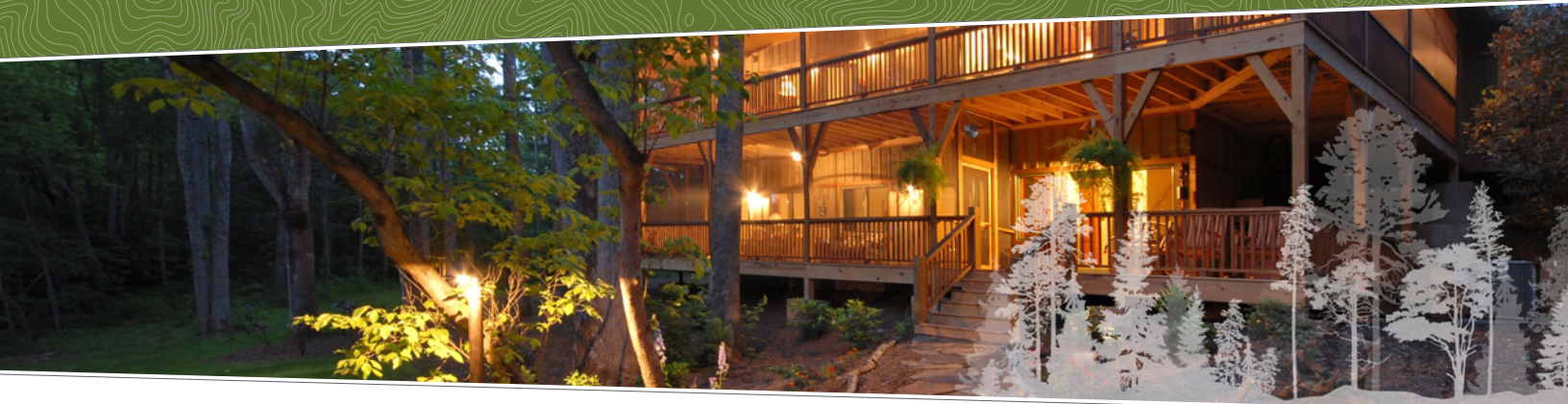
Since the 1980s ecotourism has been growing, and sustainable attributes are factoring into visitors' decision making:<sup>15</sup>

- According to GlobalData's Q4-2016 consumer survey, 35% globally are interested in booking ecotourism holidays, which increases to 57%, when referring to Americans with a household income that exceeds \$150,000/year.
- 96% of Condé Nast Traveler readers think hotels and resorts should be responsible for protecting the environment they operate in, and most travelers are willing to pay more money for an eco-friendly accommodation.

In the development of products and infrastructure for tourism, it is important to incorporate attributes that will attract the growing sector of travelers concerned with sustainability. This will also help to maintain the character of the Maine Woods, by including aspects such as:

- Low impact and/or green buildings and facilities
- Sustainable transportation options
- Locally sourced food
- Protecting environmentally sensitive areas and managing the use of popular locations
- Respect for local cultures and indigenous communities
- Carbon offsetting





How might the sharing economy transform the Maine Woods tourism industry?



The sharing economy may help fill service gaps in the tourism industry in the Maine Woods, and create a broad base for new entrepreneurial tourism related businesses.

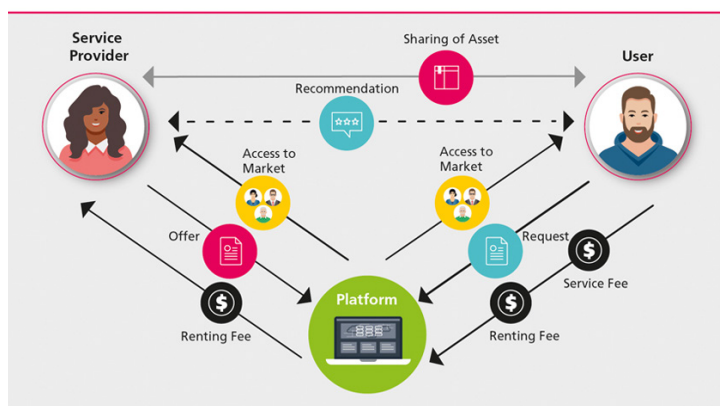
### 2.5.3 SHARING ECONOMY

Sharing and collaborative consumption in travel is nothing new, but it has exploded in recent years due to increased consumer interest, and increased awareness of idle assets. Mobile technology, social media and trusted e-commerce have turned it from a counter-cultural, backpacker's niche to a massive business, and make it possible to match supply and demand to a wide network with a reasonable level of trust.<sup>16</sup> The Sharing Economy is forecast to reach USD \$335 billion by 2025, according to projections by PricewaterhouseCoopers, and much of this growth is in the tourism sector.

The sharing economy is mainly apparent in four sub-sectors of tourism:<sup>17</sup>

- **Accommodation:** Short-term rentals of all or part of private accommodation, using platforms such as Airbnb, VRBO, and Homeaway, additionally small local or niche based platforms operate alongside the global players. Users of peer-to-peer travel tend to stay in a destination longer.
- **Transportation:** Car-sharing, car-pooling, ride-hailing and bike-sharing, using platforms such as Uber, Lyft, and Blablacar, as well as regional apps and networks.
- **Dining:** Purchasing home-cooked meals or attending dinners organized by local residents, platforms include EatWith, BonAppetour and Feastly.
- **Travel planning:** Itinerary planning and tours by locals who offer personal and customized experiences, platforms include Vayable, ToursByLocals and VoomaGo.

#### SHARING ECONOMY BUSINESS MODEL



Source: Sharing Economy Business Model. Source: Business Model Toolbox

The sharing economy has the potential to expand visitor options, employ under-utilized assets and enable product growth without significant investment, while stimulating new entrepreneurs and innovation among traditional service providers and spreading tourism to less visited areas. Care must be taken to ensure that service providers in the sharing economy meet quality, safety, tax and insurance requirements.<sup>18</sup> The sharing economy provides an opportunity for regional leaders to re-think how tourists experience their area and how community stakeholders can benefit from participating in this new form of economic activity.



How important is sustainable tourism to the Maine Woods destination development approach?



Increasingly, visitors are making travel decisions based on multiple factors, including environmental, social and economic considerations.

## 2.5.4 SUSTAINABLE TOURISM

Sustainable Tourism is currently emerging as a major driving force in destination development. Becoming a premier destination requires balancing fiscal, social and environmental considerations.

Sustainable Tourism is “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”<sup>19</sup>

Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development. A suitable balance must be established between these three dimensions to guarantee its long-term sustainability. For example, Travel Oregon has defined sustainable tourism as being guided by these principles<sup>20</sup>:

1. Is integrated with and respectful of the culture, homeland, heritage, and people of a place
2. Provides a unique experience for the visitor
3. Generates localized economic development benefits
4. Has a balancing or beneficial impact on the environment
5. Generates revenue that is invested in conserving and enhancing the unique features of the community
6. Provides an educational experience for the visitor that leaves them enriched and inspired to create positive change at home
7. Encourages diverse parties to work together to create new opportunities and to address common challenges
8. Serves target markets that are profitable, with promising long-term viability

The principles of sustainable tourism are well suited to the Maine Woods Region.

## WHAT IS SUSTAINABLE TOURISM?

**82%**

Respecting and enhancing the heritage, culture, traditions, and distinctiveness of communities

**70%**

Increasing the number and quality of local jobs supported by tourism

**71%**

A commitment to preserve a destination's authenticity and not become too “touristy”

**64%**

Engaging residents in deciding the role of tourism in their communities



Source: Destination Better and Sustainable Travel International [www.destinationbetter.com](http://www.destinationbetter.com)





What role should sustainability play in the tourism industry in the Maine Woods?

## 2.5.5 BENEFITS OF SUSTAINABLE TOURISM

An increasing number of travelers are deciding where to visit based on sustainable practices, and are more likely to visit destinations where they can have an authentic experience of place, while conserving natural and cultural heritage, and making purchasing decisions that support local communities.<sup>21</sup> Many aspects of sustainable tourism fit well with the character and values of the Maine Woods, and could benefit the economy of the region.

# SUSTAINABILITY

**74%**

Invest in employee training and development in ways that allow employees to advance in their career and contribute to the community

**79%**

Educate customers about the unique features of a destination - its history culture, residents, and resources

**81%**

Offer travelers experiences that reflect the unique character of the destination



Sustainable travelers are far more likely to travel with friends than all others

**7+**

Sustainable travelers are significantly more likely to stay 7 or more days, whereas the most recent trip of all others was less than 3 days

**SUSTAINABLE TRAVELERS SPEND MORE**

**\$1,749**

**\$1,154**

They are less price-sensitive than other travelers and spend significantly more money on average

Creating products for destination development that incorporate principles of sustainability will generate high value visitation, and protect the environment and character of the Maine Woods.

Source: Destination Better and Sustainable Travel International [www.destinationbetter.com](http://www.destinationbetter.com)

Visitors with a focus on sustainable tourism, not only stay longer and spend more, they also respect the natural environment and communities they visit. The Maine Woods will achieve sustainable tourism growth by concentrating efforts on those products and markets with a socially equitable approach, including development and promotion of a diverse range of rural, nature-based, recreation, adventure, and local cultural experiences.

To ensure the long-term sustainability of tourism, regional leadership will need to be aware of the management of natural and cultural assets, and the potential for damage from overuse in popular areas.



How does the Maine Woods region best position itself as a destination to appeal to an increasingly diverse visitor base?

Growth in the Maine Woods tourism industry will require the ability to adapt to meet the needs and interests of visitors from new and diverse markets.

## 3.0 TOURIST OF THE FUTURE

Emerging macro trends are reshaping visitor profiles and interests. They are becoming more diverse in age, origin and interests. These demographic and societal shifts mean that the Maine Woods tourism industry will need to develop infrastructure, products, programming, and services that resonate with these diverse groups, and adjust its marketing and market positioning accordingly. Some of the major evolving groups of travelers nationally are<sup>22</sup>:

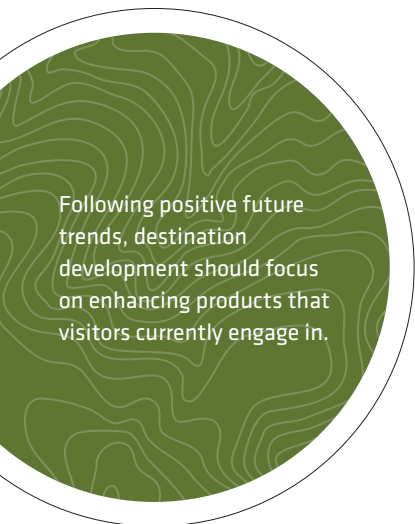
- **Millennials** - Millennial travel spending has grown 30% since 2007, and they now account for 20% of global travel spending. They will soon become the largest travel spending demographic cohort.
- **Elders** - are estimated between 1.3 and 1.6 billion worldwide, travelling for relaxation and exploration, staying longer than average visitors, and enjoying off-peak periods. Seniors are wealthy, demanding visitors, looking for safe destinations that are quieter and less congested.
- **Multi-Generational Travel** - 40% of families went on a multigenerational vacation in 2016. Today's seniors are living longer, healthier and more mobile lives and are eager to travel with grandchildren. Grandparents travel almost 25% more than the average leisure traveler. Family group travel and reunions offer opportunities for growth.
- **Increasing Wealth** - The number of U.S. millionaires is projected to grow from 10.5 million in 2011 to 20.5 million in 2020, according to Deloitte & Oxford Economics. At the same time, the top 9% of U.S. Households (Household Income \$150k+) account for 29% of all spending on air travel and lodging.
- **Growing Global Middleclass** - There is currently a massive growth of the global middle class, especially in the Asia region. Europe will likely remain the largest overseas market for visitors to the U.S., however its market share is decreasing (from 50 percent in 2008, to a projected 36 percent in 2020). The largest growing market is Asia with its share projected to continue to increase (from 24 percent in 2008 to a projected 34 percent in 2020).<sup>23</sup>

Both the domestic and international tourism markets are expected to continue to grow, providing an important source of economic development in the U.S. and in the Maine Woods. Combining the information on existing visitor segmentation with global and national tourism trends will help the Maine Woods determine how to optimally develop the local tourism industry.





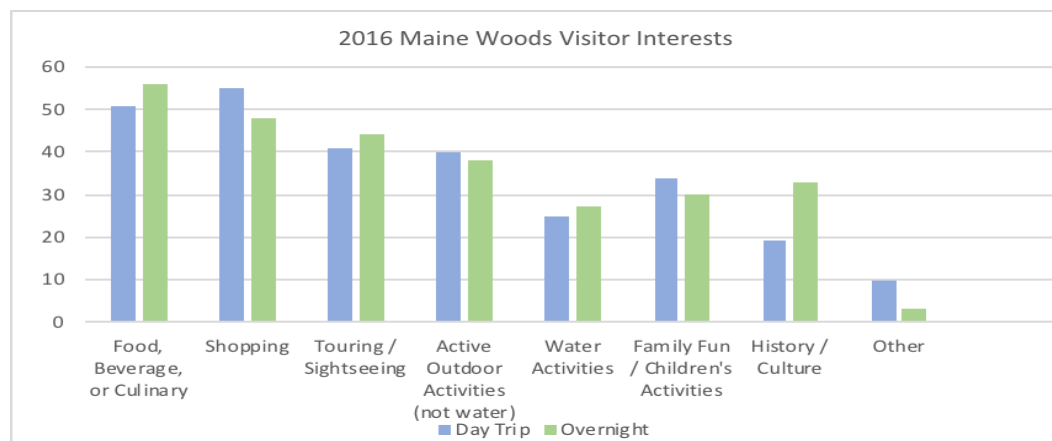
How can the Maine Woods best connect together unique local products and activities to create outstanding visitor experiences?



## 4.0 KEY TRENDS SHAPING OUTDOOR AND EXPERIENTIAL VISITOR ACTIVITIES

The Maine Office of Tourism tracks visitor interests and spending. Current primary interests of visitors in the Maine Woods<sup>24</sup> consist of:

- Food/Beverage/Culinary
- Touring or Sightseeing
- Shopping
- Outdoor and Family Activities
- History/Culture



Source: Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report Maine Woods Area Special Report, 2017.

Visitor spending Maine is concentrated on (2017 values)<sup>25</sup>:

- Lodging (41 % Overnight visitors)
- Food (20 % Overnight and 29% Day Trip)
- Retail (16% Overnight and 35% Day Trip)
- Recreation (11% Overnight and 19% Day Trip)
- Transportation (12% Overnight and 17% Day Trip)

This chart represents visitor interests from the entire Maine Woods region, including both urban population centers and rural areas. Further details are available in the Maine Office of Tourism Regional Reports for Aroostook County, DownEast Acadia, Kennebec Valley, Maine Highlands, and Maine Lakes & Mountains. One key aspect with regard to visitor interests and activities is that not all activities are available in all parts of the Maine Woods. For example, major retail opportunities are primarily in the larger population areas, rather than the rural areas. For destination development it is important to assess an area's capacity to provide experiences combined with the interests of the visitor market.





How can the Maine Woods best capitalize on its natural resources to create unique outdoor activities?

The Maine Woods offers a wide range of superb outdoor experiences. Combining these within a deliberate destination development program will help grow the tourism industry in the region.

## 4.1 OUTDOOR ACTIVITIES

Tourism trends show that travellers are increasingly focused on trips that include opportunities for adventure, fitness, connecting to nature, and digital detoxification. In fact, nearly 54% of travelers are planning an adventure activity on their next trip.<sup>26</sup> The Maine Woods offers access to many outdoor activities such as snowmobiling, ATVs, hunting, fishing, canoeing, rafting, kayaking, skiing and snowboarding, hiking, camping, cycling, and nature viewing. There are many ways to experience these activities, from self-guided trips to full service, guided experiences.



Part of destination development to increase tourism for the Maine Woods will involve providing visitors with easy ways to access outdoor activities. Creating engaging curated packages of activities will help the Maine Woods to showcase what it has to offer visitors. Service providers will need to facilitate access to rental equipment, guides and transportation, and easy ways to find and book online.







How will motorized recreation evolve?  
Will electric ATV and snowmobiles change the industry?

One-third of the snowmobile market in 2018 is for back-country, off-trail capable snowmobiles, designed for deep powder “shredding.” (source: Bob Myer, MSA). Maine is well placed to take advantage of this kind of trend, and the move to ‘mudding’ and extreme off-road driving.

## 4.1.1 OFF-HIGHWAY VEHICLE RECREATION

Off-Highway Vehicle (OHV) recreation is an exciting and enjoyable way to move through the landscape. Currently, such vehicles tend to be faster, louder and larger than other means of outdoor travel.

Off-highway recreational vehicles can include 4x4s, snowmobiles, off-road motorcycles, quads, and trikes, dune buggies and amphibious craft. Noise, air quality, ecological damage and conflicts with other (non-motorized) outdoor recreation participants can create tension in the planning for access of these vehicles to recreation areas.

Overall, per capita OHV recreation is expected to decrease in the US, but with population increases the total number of users will continue to rise. In Maine, ATV trail development has seen expansion within the last decade, and the number of non-resident ATV registrations has climbed significantly. Snowmobile registrations during 2004-2014 fluctuated, with dramatic reductions in registrations during low snow years and the challenging economy of 2011/2012.<sup>27</sup> The number of people participating in motorized activities is smaller than some other user groups, however they often travel to enjoy the activity and can be a valuable visitor throughout the seasons.<sup>28</sup>

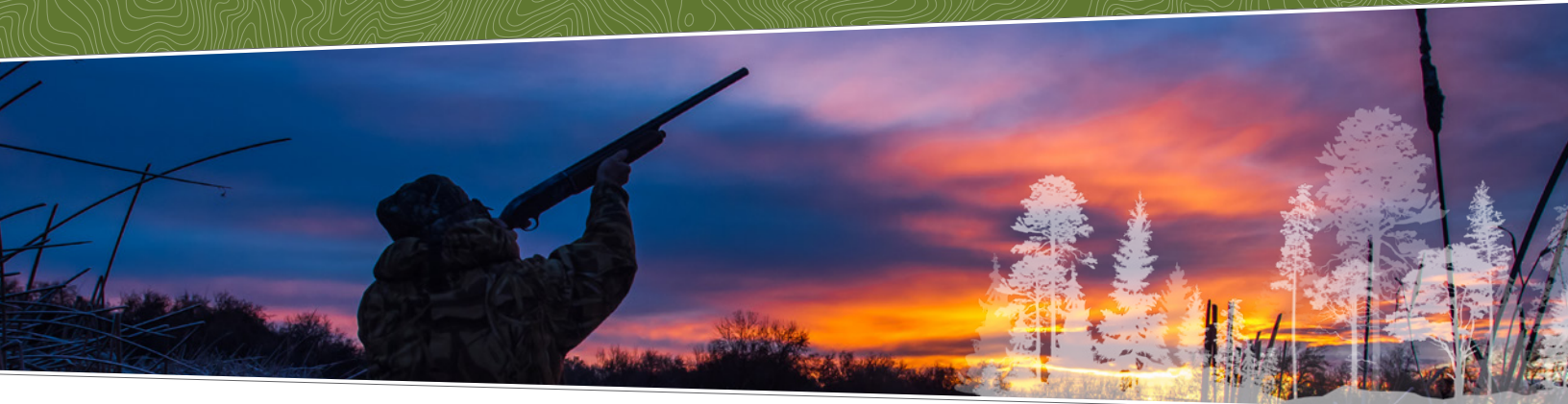
Activity	% Change in Total Participants	% Change in Total Days	Projected Per Capita Participation	Projected Adult Participants (millions)	
	1999-2009	1999-2009	2008-2030	2008	2030
Off-Highway Vehicle Driving	34.50%	47.60%	-4.70%	47.9	57.8
Snowmobiling	-5.50%	-23.70%	-10.40%	9.40	10.7

Source: National Center for Natural Resources Economic Research (2014)

### Nationally, two main trends are apparent in Off-Highway Vehicle recreation:

- Moves to increase management and controlled access include approaches such as designated trails with limits on noise and speed. In addition, there are restrictions on access to sensitive ecosystems (e.g. streams and wetlands), and the designation of trails for non-motorized use only.
- Technological advancements such as safety improvements (e.g. warning sensors), and electric and hybrid motors leading to reduced emissions and noise.

These advances will likely attract new users to the market, and change the nature of the OHV recreation sector. Trail expansion and better snow seasons in the Maine Woods make it an attractive destination for these visitors, and having infrastructure, amenities and rental equipment available will help to develop this aspect of the tourism industry.



What role could hunting play in the future growth of outdoor tourism in the region?



Attracting new markets will be key to sustain or grow the hunting industry. The Maine Woods' excellent hunting opportunities can be used to differentiate the region, and provide visitors with a unique experience.

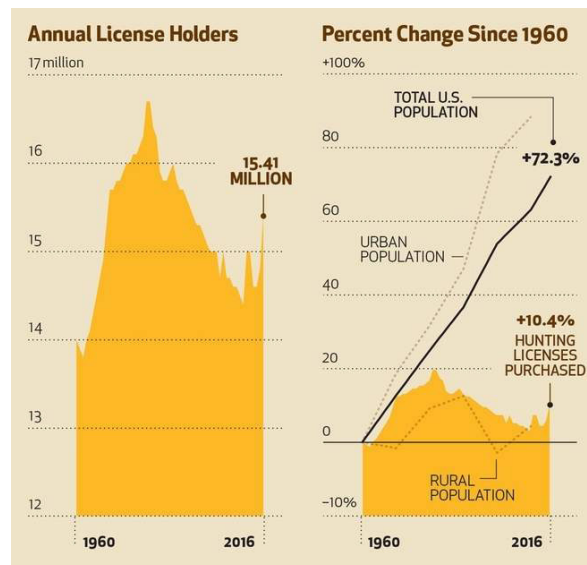
## 4.1.2 HUNTING

Since the 1980s hunting has been on the decline in the U.S. and the decline is expected to continue for the foreseeable future. The main reason for the decline is that male baby boomers make up the largest component of the hunting community and have begun to age out of the activity. Added to this is an increasingly urban population, changing demographics of the U.S. and a decrease in the popular culture of hunting as a sport.<sup>29</sup> Participation peaked in 1982, when nearly 17 million hunters purchased 28.3 million hunting licenses. Hunter numbers have steadily declined since, with a decline of 2.2 million hunters between 2011 and 2016. The number of hunters per capita continues to fall and is likely to drop by at least 11 percent by 2030.<sup>30</sup>

Hunting is important to the economics, character and traditions of Maine. The sport continues to draw non-residents to the State. Despite its popularity, there has been an overall decreasing trend with a roughly 30% drop in hunting licenses sold to non-residents and a 50% drop in big game licenses in recent decades.<sup>31</sup>

Efforts to promote growth in hunting focus on engaging new hunters, and include targeting women, youth, and trend setting communities such as urban hipsters, suburban locavores, and homesteaders who are interested in local, sustainable, ecologically conscious meat. It should be noted that between 2010 and 2014, the number of millennials hunting with firearms has increased from approximately 3.5 million to approximately 5 million (see chart on page 30 - Hiking).

Technological advances are also opening up the activity via trail cameras, apps, hunting apparel, guns and bows. The Maine Woods offers sporting camps and lodges, guides, infrastructure, and access to hunting on private land which provides outstanding opportunities for quality hunting experiences. Destination development for the region should include hunting as part of the range of activities available to visitors.



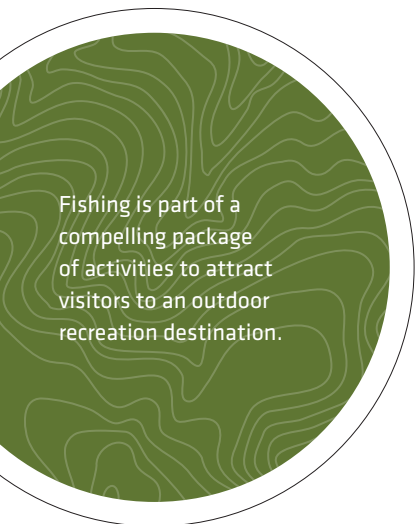
These graphs reflect the change in hunting license holders over time (left) and those same trends compared to the change in national population trends. The upswing in license holders in the 2000s is attributed to a change in data collection methods.

Source: Illustration by Nicolas Rapp / Sources: USFWS, U.S. Census





How can fishing best fit into the tourism experience package?



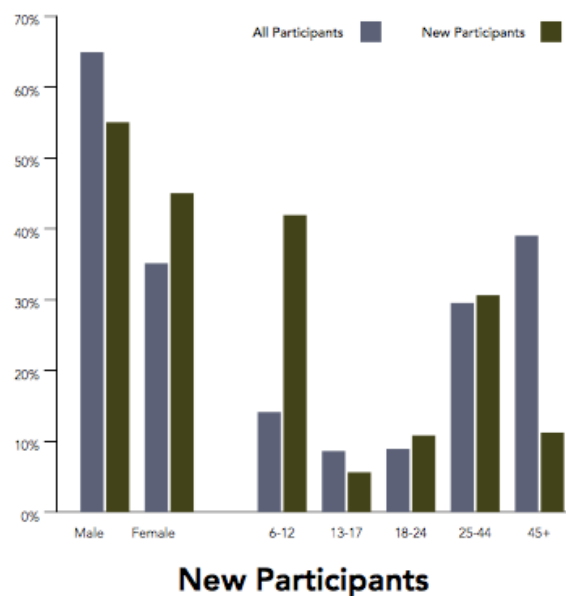
### 4.1.3 FISHING

Fishing is one of America's favorite leisure pastimes. Similar to hunting, the industry is expected to decrease in per capita participation (-2.6% between 2008 and 2030). This is offset by population increases, and the overall participation in fishing is expected to rise from 72.7 million to 89.7 million participants.<sup>32</sup> The fishing industry has recognized that as older participants 'age out' of the activity it is important that new participants are recruited. There has been a focus on recruiting women and youth into the sport.

In Maine, fishing continues to draw visitors, with about 70,000 non-resident licenses issued annually, and approximately 180,000 fishing licenses issued to residents. The number of fishing licenses has remained fairly steady over the last decade.<sup>33</sup>

New England has a relatively low participation rate in fishing (4.1% of the population). Most people that fish (77% of participants) also take part in other outdoor recreation activities such as hiking, camping, hunting, cycling, and running.<sup>34</sup>

The Maine Woods has ample opportunities and infrastructure to provide visitors with a superb fishing experience, including the opportunity to fish for the native eastern brook trout, where the region is a last stronghold of its remaining habitat.



Source: Outdoor Foundation, 2017. Special Report on Fishing

“When all the routines and details and the human bores get on our nerves, we just yearn to go away from here to somewhere else. To go fishing is a sound, a valid, and an accepted reason for an escape. It requires no explanation.”

– Herbert Hoover, Former United States President (1929-1933)



How can paddlesports be developed and expanded to attract visitors?



Paddlesports are a fast growing activity in the U.S. Providing opportunities for various levels of participation will encourage visitation in lake, river and seaside areas.

#### 4.1.4 PADDLESPORTS

Participation in paddlesports such as kayaking and paddleboarding has increased greatly in the last two decades, and they are activities that are relatively easy to access, afford and approach. They offer a way to engage with nature and be active in an outdoor setting “that can be participated in” and “that can allow participation” on many levels (e.g. beginner to experienced; calm to whitewater).<sup>35</sup>

Activity	2007 '000's people	2012 '000's people	2017 '000's people
Canoeing	9,797	9,839	9,220
Kayaking (Recreational)	5,070	8,144	10,533
Kayaking (Sea/Touring)	1,485	2,446	2,955
Kayaking (Whitewater)	1,207	1,878	2,500
Rafting	4,340	3,690	3,479
Stand Up Paddling	n/a	1,542	3,325

SOURCE: Outdoor Foundation, Outdoor Participation Report, 2017. (U.S. data).

Technological production improvements are creating higher end products at lower cost, resulting easy access to light, stable maneuverable craft.

Kayaking is being combined with other activities such as fishing, to engage more people in the activity.<sup>36</sup> The number of people in the U.S. participating in ‘floating’ activities is expected to rise from 39.8million (2008) to 48.4 million in 2030.<sup>37</sup> In Maine, this trend is consistent, with half of Maine residents reporting that they have canoed at least once within the last two years, and 41% having freshwater kayaked.<sup>38</sup> There has been particularly strong growth in the use of kayaks and stand up paddleboards.<sup>39</sup> Stand up paddleboards (SUP) are a relatively new paddlesport. SUP are relatively inexpensive to buy or rent, are easy to learn to use, and have low risk of injury, making them popular ways to exercise, access the water and nature, and to have fun with family and friends who may be at a variety of experience levels.<sup>40</sup>

This increase in public awareness and participation in paddlesports, combined with an increase in getting active during travelling (e.g. Trip Advisor saw +49% booking of kayaking and canoeing experiences in 2017<sup>41</sup>) show that these activities are important to make available to visitors. Opportunities are available for training, guiding, outfitting, and equipment rentals.







What is the role of rafting in future destination development in Maine Woods?

Rafting is a niche market that can draw visitors and provide a gateway to participating in other activities.

#### 4.1.5 RAFTING

Participation in rafting has declined slightly since the mid-2000s, and the per capita participation rate is expected to continue to decline by about 4% through 2030. This decline is balanced out by population increases with overall participation expected to remain steady at about 4 million people participating per year.<sup>42</sup>

	2006	2008	2008	2009	2010	2011	2012	2013	2014	2015	3-Year Change
Rafting	3.61	4.34	4.65	4.32	4.46	3.82	3.69	3.84	3.78	3.88	1.7%

*\*\*All participation numbers in this table are in the millions. Outdoor Foundation, 2016. Outdoor Recreation Participation Topline Report 2016*

While rafting is a smaller market, it is an activity that visitors will travel to a destination specifically for, and will invest in a guided experience. They are also likely to take part in other activities while they visit.

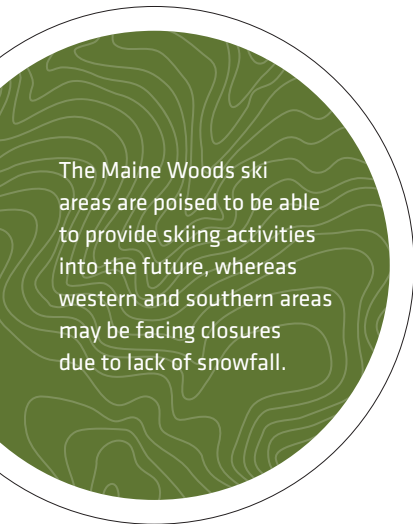
To maximize the participation in rafting it is important to offer a range of options including gentle floating, family focused, group activities and extreme whitewater, as well as day and overnight trips. Offering packages that include other activities will help to leverage the value generated by rafting participants.<sup>43</sup>

“Swift or smooth, broad as the Hudson or narrow enough to scrape your gunwales, every river is a world of its own, unique in pattern and personality. Each mile on a river will take you further from home than a hundred miles on a road.”

– Bob Marshall, Forester and Founder of The Wilderness Society



How will the trends in alpine skiing/snowboarding affect tourism in the Maine Woods?



The Maine Woods ski areas are poised to be able to provide skiing activities into the future, whereas western and southern areas may be facing closures due to lack of snowfall.

#### 4.1.6 ALPINE SKIING/SNOWBOARDING

Participation in skiing and snowboarding is expected to continue to increase, with a 6.7% rise from 2008 to 2030 from 23.7 million to 32.1 million participants. These visitors are some of the highest recreation spenders, with expenditures on recreation fees (e.g., lift tickets), restaurants and bars, and lodging.<sup>44</sup> However, the length of the U.S. ski season is shortening due to climate change. The effect on the upper mid-west and southern New England ski areas may be catastrophic, but northern areas could see benefits, with ski refugees trekking northwards.<sup>45</sup> Northern resorts will likely see more uncertain snowpack and shorter ski seasons and the key to success will be diversification.

Attracting visitors for extended stays and repeat visits in the off season will be the key to longevity for ski areas, and will help support the ski economy. This includes providing a suite of complementary winter activities, such as multi-resort passes, snowshoeing, tubing, snowmobiling, après ski entertainment and dining, and developing off season activities such as mountain biking, hiking, zip lines, canopy tours, gravity coasters and golf courses.

For me, personally, skiing holds everything. I used to race cars, but skiing is a step beyond that. It removes the machinery and puts you one step closer to the elements. And it's a complete physical expression of freedom."

– Robert Redford, American Actor



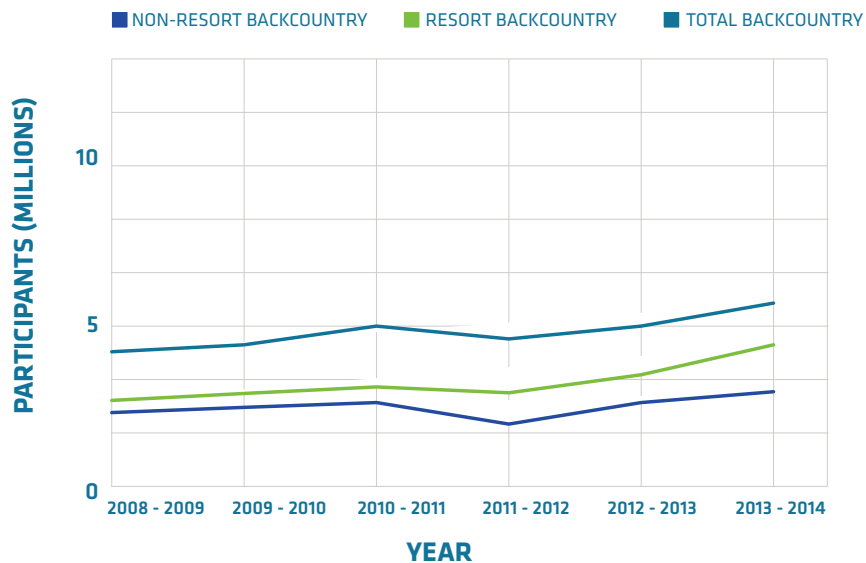




#### 4.1.7 BACKCOUNTRY SKIING

Skiing in undeveloped areas is expected to have a slight decline in per capita participation (-0.6%) between 2008-2030, but a slight increase in overall participation from 7.8-9.8 million in the same time period.<sup>46</sup> The skiing industry has recognized that with improvements in backcountry equipment, and as lift and fuel prices rise and resorts become more crowded, more people are turning away from resorts.<sup>47</sup>

What opportunities are available for the tourism industry to benefit from backcountry skiing?



Source: Spillman, B. 2015. *Backcountry to the future: More skiers skip lift lines*. Reno Gazette Journal

Some ski areas are building lifts to take skiers out of the resort to access the backcountry, and combining lift access with opportunities for Cat, heli, and ski touring. Providing equipment, guiding and backcountry education training creates additional opportunities for resorts, shops and guides to develop services to visitors. Backcountry safety is essential so local knowledge and training is a critical part of the backcountry tourism package.<sup>48</sup>

“There is no such thing as too much snow.”

– Doug Coombs, American Alpine Skier and Mountaineer who helped pioneer the sport of extreme skiing

Providing equipment, training and guiding to visitors to access the backcountry are opportunities for shops and resorts to leverage the increased interest in backcountry skiing.





Is Nordic skiing an activity that can add value to the visitor experience in the Maine Woods region?

Providing Nordic skiing at resorts and on existing trails systems, as well as training and equipment rentals, could provide additional opportunities for the Maine Woods to increase visitor engagement in activities during the winter season.

#### 4.1.8 NORDIC SKIING

Nordic (cross country) skiing is among the fastest growing outdoor activities in the U.S. It has shown a steady annual growth averaging an increase of approximately 13% for the last 3 years, with approximately 4.6 million participants in 2015.<sup>49</sup>

ESTIMATED PARTICIPATION IN U.S. CROSS COUNTRY SKIING (MILLIONS 2007- 2016)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	3-Year Change
Skiing (Cross-Country)	n/a	3.53	3.85	4.16	4.53	3.64	3.31	3.38	3.82	3.88	4.64	40.3%

Source: Outdoor Foundation, 2017. *Outdoor Recreation Participation Topline Report 2017*

Nordic skiing is relatively inexpensive to participate in, with less expensive equipment and lower fees to access trails. It is also a safer sport than alpine skiing and snowboarding, making it attractive to aging Baby Boomers and young families. Nordic trails often have a longer season, staying open beyond the chair lifts at downhill ski resorts. Many people enjoy the quieter nature of the sport, away from the equipment on ski hills, and busy nature of resorts. Growth in the sport is also attributed to its health benefits, including cardio-vascular fitness and a full-body workout.<sup>50</sup>

Providing Nordic skiing as part of the complement of winter activities in the Maine Woods region will engage more visitors during the season, and provide opportunities to local entrepreneurs for equipment provision and training. Events may also provide opportunities to attract new visitors to the region.

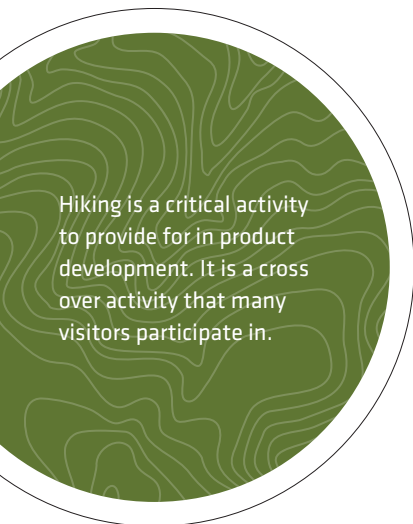
“Do not follow where the path may lead. Go instead where there is no path and leave a trail.”

– Muriel Strode, American Author



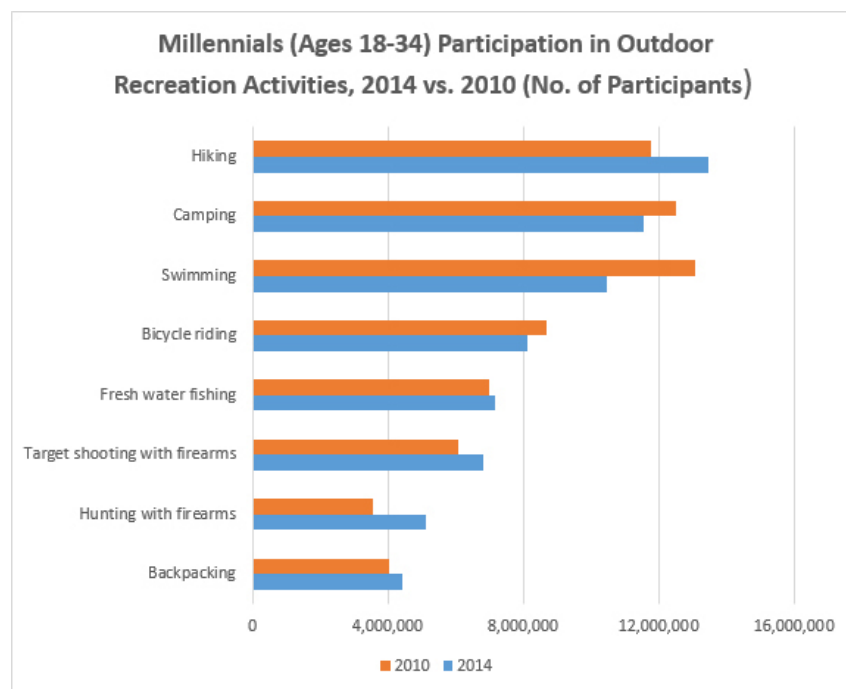


Can the Maine Woods turn its fantastic trail network into an international destination for outdoor enthusiasts?



#### 4.1.9 HIKING AND BACKPACKING

Hiking is one of the most prevalent outdoor activities in the U.S. The sport is expected to continue to grow, with per capita participation predicted to increase by 3.1% between 2008 and 2030, and the number of participants to grow from 78.3 million to 102.2 million.<sup>51</sup> More than 65% of Maine residents participate in hiking activities, and the State offers approximately 2,252 miles of walking/hiking trails.<sup>52</sup> Nationally, participation is increasing in both younger and older demographics and millennials are hiking in greater numbers for fitness to connect with nature and unplug. Baby Boomers hike for the similar reasons, with a shift to hiking as they age out of other activities.<sup>53</sup>



Source: <http://www.sportsmarketanalytics.com/Blog/July-2015/The-Millennials.aspx>

Tour and activity companies are observing an increase in walking and hiking bookings. These activities have broad appeal and can be participated in by a range of participants, making them good for multi-generational groups and older participants.<sup>54</sup>

Maintaining and developing trails is critical for destination development. They can be used for multiple activities and provide an attraction for the large portion of the population that engages in hiking activities. Hiking also gives the opportunity for local guides to expand their businesses.



How can macro trends in cycling be converted into growth in the local tourism industry?

#### 4.1.10 CYCLING

Biking encompasses the three main trends in tourism: authenticity, adventure, and sustainability. The Adventure Cycling Association has found that the bicycle tourism sector in the U.S. and globally is becoming more prominent, more lucrative, and is diversifying, especially with the boom in backpacking and off-road travel. The Outdoor Industry Association found that in 2016 bicycling participants spent \$83 billion on ‘trip-related’ sales (bicycle tourism).<sup>55</sup> Demand for bicycle tour opportunities is also prompting new and expanded bike route networks and facility improvements at the regional and national levels.<sup>56</sup> Cycling tourism covers a range of two wheeled activities, including day and overnight trips, road or trail rides, bicycle touring, mountain biking, and both guided and self-guided experiences. In Maine, mountain biking in particular has seen an increase in demand, as evidenced by the strong growth in Maine chapters of the New England Mountain Bike Association and the associated trail development these groups have spearheaded.<sup>57</sup> In North America, and locally, cycling events are thriving and expanding.

Cycle tourism connects to many of the current trends in lifestyle and travel providing opportunities for destination and business development.



Several trends in cycling are supportive of cycle tourism including electric bikes, which are opening up longer rides to new markets, and fat bikes, which allow access to new terrain and are creating a market for winter cycling. These trends, as well as demand for more events, single day and multi-day tours, and bike shares and rentals provide entrepreneurial opportunities for businesses in the Maine Woods region. These will be particularly attractive to visitors combining cycling with other opportunities to authentically experience the region, including culinary or beverage tours, and wildlife or leaf watching.





How big is the potential for nature and wildlife viewing in the Maine Woods region?

4.1.11 BIRD, WILDLIFE, AND NATURE VIEWING

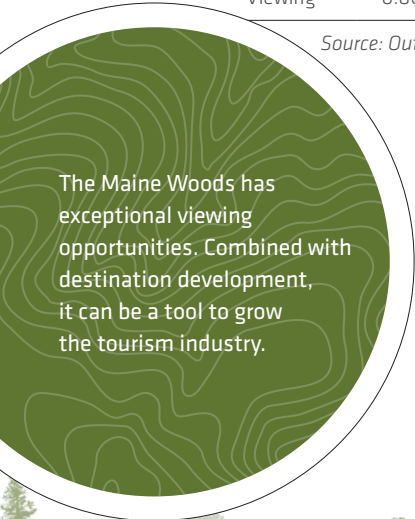
Wildlife viewing (including bird watching) is increasing, showing a 20% growth from 2011 to 2016, from 71.8 million to 86 million participants.<sup>58</sup> Viewing nature is strongly connected to travelling and tourism, especially with an increasingly urban population that seeks to connect with nature and disconnect from the digital world. In 2016, wildlife watchers spent approximately \$18 billion on trip related expenses, and \$30 billion on retail expenses in the U.S.<sup>59</sup> Rural and wilderness areas can capitalize on the market for bird, wildlife and nature viewing, and can utilize these activities to expand tourism in the off-season.

The Maine Woods region has a diverse range of landscapes and ecosystems with ample opportunities for wildlife viewing. Tourism industry growth can occur by continuing to compile and provide information on bird and wildlife viewing opportunities, as well as locations for nature viewing through the seasons (e.g. leaf watching; viewscape locations), and combining this information with destination development for guided tours, events, and pairing with other activities, such as culinary, agritourism, cycling, paddling, and hiking opportunities.

PROJECTED PARTICIPATION AND USE FOR ACTIVITY GROUPS BETWEEN 2008 AND 2030

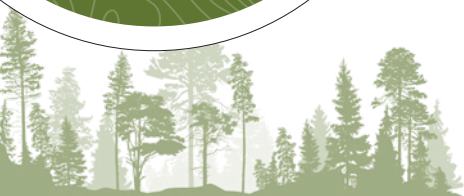
	Per Capita Participation			Adult Participants (millions)			Days per Participant			Total Days (millions)		
	2008 Rate	2030 Rate	Percent Change	2008 Number	2030 Number	Percent Change	2008 Rate	2030 Rate	Percent Change	2008 Number	2030 Number	Percent Change
Viewing & Photographing Nature												
Birding	0.346	0.361	4.4	81.4	107.7	32.3	97.71	97.91	0.2	8,215	10,889	32.5
Viewing	0.805	0.814	1.2	189.4	242.7	28.1	169.59	163.96	-3.3	32,303	40,019	23.9

Source: Outdoor Recreation Trends: Effects on Economic Opportunities



“Study nature, love nature, stay close to nature.  
It will never fail you.”

– Frank Lloyd Wright, American Architect, Designer, Writer and Educator







What packages of activities would create the most exceptional Maine Woods visitor experience?

## 4.2 EXPERIENTIAL ACTIVITIES

An overarching trend in tourism is the pursuit of authentic experiences, including adventure, learning skills, rejuvenation, and fulfilment. Visitors are interested in the sense of place, meeting people, and experiencing local culture, food, history, and nature.



Creating easily accessible packages of experiences for visitors will help to increase the tourism industry for the region.

The Maine Woods Region will be able to create a destination development program by determining what makes different parts of the region interesting and unique. This information can be used to create packages of experiential opportunities for visitors to connect to the Maine Woods character. Experience groupings can be created utilizing a multitude of techniques, such as itinerary development, maps, wayfinding, online information, facilitated activities, and package bookings that are tailored for individual tastes. Visitors can be engaged by providing a range of ways to connect to the experiences available in the region.







What new curated experiences and tours could make a trip to the Maine Woods an outstanding destination?



## 4.2.1 TOURS

The Maine Woods offers abundant experiences that are conducive to tours. Tours are no longer strictly about busloads of visitors being ferried from attraction to attraction. There is strong demand for outdoor experiences that interpret elements of Maine's outdoor heritage and provide the opportunity to participate in heritage first hand. Tours involving outdoor activities are excellent opportunities for local entrepreneurs to provide this in-demand service.<sup>60</sup> Biking, walking, and hiking tours are all increasing in popularity, providing additional modes of mobility, on land and water, including self-driving or equipment rentals that will increase access to tourist markets.<sup>61</sup>



The Maine Woods offers opportunities to experience the region's features such as fall foliage, wildlife viewing, or even the working forests, by coordinating tours with knowledgeable locals and combining visits with outdoor activities.

Traditionally, tours have been provided by larger providers with large marketing budgets and access to package tourism providers. However innovations in booking technology are being developed which aggregate services from smaller providers (e.g. Get Your Guide, Vayable, ToursByLocals and VoomaGo), so that travelers can compare options and book directly with local businesses.<sup>62</sup>







How can the Maine Woods develop new and authentic events that will attract more visitors and visitor spending?



Events that showcase the strengths of the region will connect visitors to the Maine Woods, and hopefully they will become long-term repeat visitors.

## 4.2.2 EVENTS

Events can be a powerful way to attract tourists to a destination, and can potentially have a significant contribution to local economies. Events can include cultural celebration, arts and entertainment, conferences and conventions, sport competitions, recreational gatherings, or educational events. On a basic level, an event acts as a draw for people from outside the local community to visit and spend money on accommodation, food and leisure activities at the destination. Events also help to build an image into the minds of tourists who have never visited the place, and can attract attention to the destination through media coverage.<sup>63</sup>

Events increase demand for services from local businesses, and can provide off-season benefits to the economy. Events are also a tool to reach specific target markets, and they can reinforce the destination's image and help in the promotion, positioning and branding of a destination. The long-term advantages of hosting a successful event may also include improvement in infrastructure, investments by businesses, quality of life for locals and an excellent experience for travelers.<sup>64</sup>

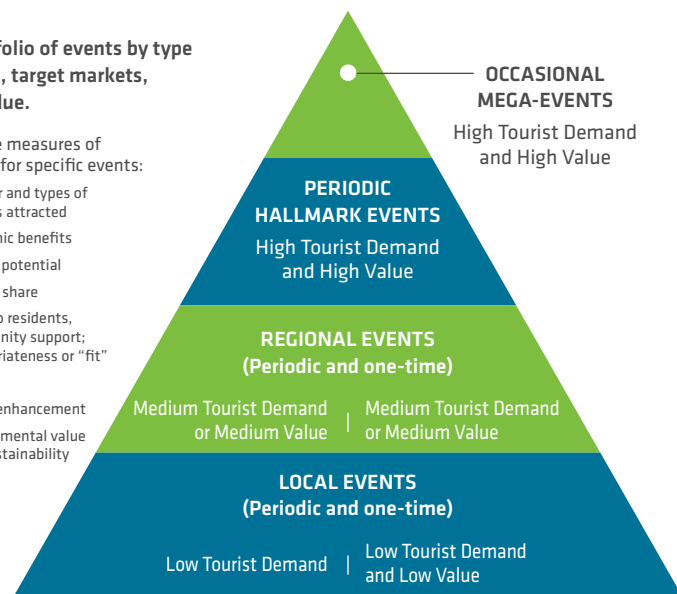
As part of destination development, the Maine Woods should determine which additional events will help attract new visitors, and help build the tourism industry during the off-season (for example the focus could be on outdoor activities, or regional culinary or cultural celebration.) One area of growth is in athletic events, with 31% of all US travelers (and 53% of US Millennials) regularly or occasionally participating in athletic competitions on vacation.

Non-traditional endurance race events like Tough Mudder have grown rapidly to accommodate 4 million participants/yr (over 2.5million for marathons and half-marathons).<sup>65</sup>

### A portfolio of events by type season, target markets, and value.

Possible measures of "value" for specific events:

- number and types of tourists attracted
- economic benefits
- growth potential
- market share
- value to residents, community support; appropriateness or "fit"
- quality
- image enhancement
- environmental value and sustainability



Source: D. Getz and S. Page, 2016. Progress and prospects for event tourism research, *Tourism Management*, V. 52.





How can regional heritage and culture benefit the tourism industry?

### 4.2.3 CULTURE & HERITAGE

One of the key trends in travel is seeking authentic experiences through experiential learning. Culture and heritage tourism provides travellers with opportunities to connect to local communities and experience the regional way of life. These travelers have an appetite for historic buildings and other historic attractions; archaeological sites; state, local, or national parks; art galleries or museums; concerts, plays or musicals; ethnic or ecological heritage sites; regional cuisine, crafts and arts. They are also interested in learning from locals through tours and workshops, and in giving back to the community. Culture and heritage tourists spend more and stay longer (as much as 38% higher per day and they stay 22% longer overall compared to other kinds of travelers), and will visit a place for a particular event such as a historical celebration or festival.<sup>66</sup>



Destination development that showcases regional heritage or cultural characteristics can provide benefits such as:

- promote the active preservation, protection and investment of and in important local resources, local traditions, customs and culture
- create new jobs, businesses, events and attractions, which support small businesses and enables them to expand
- build vital relationships among and within local communities
- build social capital
- improve the community's image and pride
- encourage the development and maintenance of new/existing community amenities
- create opportunities for both local residents and visitors to enjoy the cultural arts, history and preservation

Heritage and culture are key aspects of a destination that contribute to an authentic travel experience.





How can retail experiences play a role in rural tourism destination development?

Products that complement the regional character are desired by tourists seeking an authentic travel experience.

#### 4.2.4 RETAIL

In Maine, a significant portion of tourism spending is in retail, twice what is spent on recreation.<sup>67</sup> Much of the retail spending occurs in urban areas and by cross-border shoppers, however, tourism shopping can be a boost to the industry even in non-urban areas. With the shift to a focus on authentic experiences and connecting to local communities, there is a trend for travelers to concentrate their retail spending bringing home something unique, that they can't get at home, in particular, local products, such as regional culinary products, locally manufactured items, and art.<sup>68</sup>



Destination development that includes marketing and spaces for local products such as route maps, markets, and shops in high traffic areas with aggregated local products helps to support the local economy, and provide an improved tourist experience.







How can agricultural businesses receive economic benefit from tourism?

#### 4.2.5 AGRI-TOURISM

Rural tourism is increasing, and agritourism is an opportunity for additional income-producing opportunities for farmers. Agritourism is where the public is invited onto farms or ranches to experience activities that enhance their travel with the products, services, and experiences of agriculture.

Agritourism can include:<sup>69</sup>

- On-farm Direct Sales (U-pick, farm stands, dairy, wine, beer, farm products, etc.).
- Accommodations/Lodging (farm stays, guest ranch, B&Bs, camping, cabins, etc.).
- Entertainment/Special Events (seasonal festivals, hay rides, petting farms, pumpkin picking, haunted houses, mazes, farm dinners, weddings, parties, etc.).
- Outdoor Recreation (picnicking, swimming, hunting, fishing, photography, horseback riding, snowmobiling, biking, etc.).
- Educational Activities (farm or ranch work experience, camps, classes, tours, tastings, demonstrations, petting zoos, egg gathering, etc.).



Agritourism can help to boost the economy of rural regions, as well as help to develop and promote the character of the place.

Agritourism is an opportunity for the Maine Woods in their destination development program to provide authentic experiences, provide a rural escape for urbanites, and create direct economic benefits to local businesses. It also connects well into developing product packages and marketing with outdoor adventure activities, culture and heritage, and culinary tourism.



How can the tourism industry engage visitors in experiencing regional culinary opportunities?

#### 4.2.6 CULINARY

Dining is one of the highest proportions of travel spending, and one of the items that travellers seek out most to enjoy what a local area has to offer. In addition to visiting restaurants, culinary tourism includes cooking classes, food trails and tours, winery and farm visits, special dining experiences (including meal sharing), events and festivals, and markets.<sup>70, 71</sup>

**55%** Are motivated by the search for authenticity



Not just about Michelin Star restaurants

**63%** Of travelers take and share pictures of food



Rise of Slow Food Movement

**22%** Food tourism promotion done online

**35-50%** Travel budget spent on food



Want to participate and learn something new



Prefer to combine culinary & cultural or natural activities

Source: Travelshift.com, 2016. *The Gap In The Market – Food Tourism tourism.*

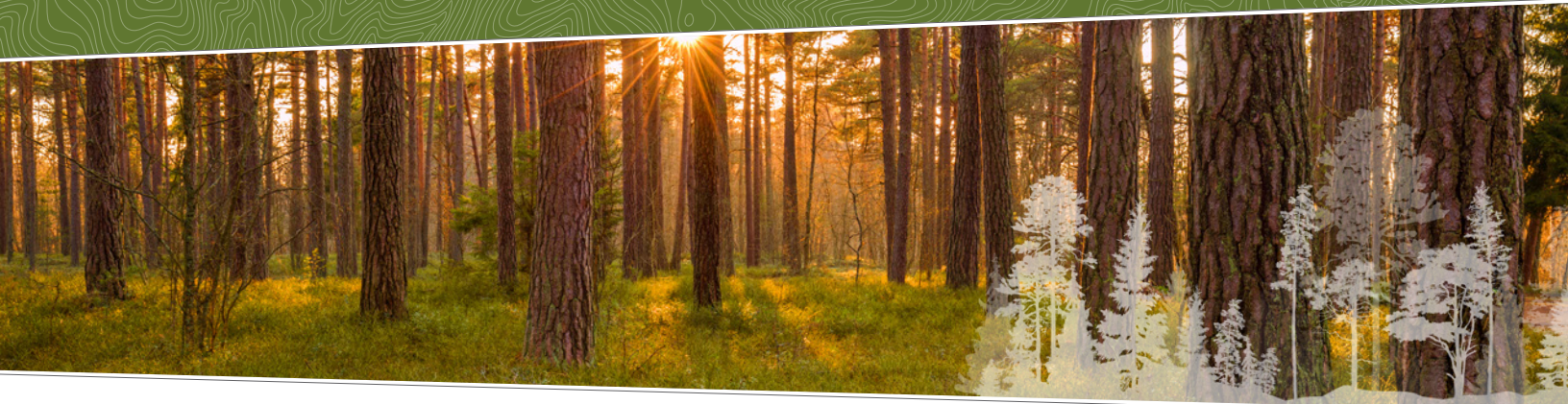
The Maine Woods can leverage its local products and regional cultures to develop authentic culinary tourism experiences to add to the destination development program, combining food experiences with culture and heritage, agritourism, and other activities. Culinary tourism can provide additional entrepreneurial opportunities for restaurants, local tour operators, farms, wineries, and breweries.

“Travel isn’t always pretty. It isn’t always comfortable. Sometimes it hurts, it even breaks your heart. But that’s okay. The journey changes you; it should change you. It leaves marks on your memory, on your consciousness, on your heart, and on your body. You take something with you. Hopefully, you leave something good behind.”

– Anthony Bourdain, *American Celebrity Chef and Author*

Food is a key ingredient in authentic travel experiences, and visitors will seek out regional culinary opportunities and products.





What destination development and marketing is needed to position the Maine Woods region as an attractive destination for the growing global tourism industry?

An analysis of tourism industry trends highlights the need to be adaptable and responsive to the evolution of travel markets and travelers. With effort and organization, the Maine Woods can leverage the region's assets to attract new visitors, and provide substantial economic benefits.

## 5.0 FUTURE OF MAINE WOODS TOURISM (5-10 YEARS)

Destination tourism is an area of significant growth potential for the Maine Woods that could become a key to regional economic development -- helping strengthen local economies and attract new businesses and residents. In order to do this, the Maine Woods region will need to focus on destination development and marketing to adapt and respond to emerging trends. The region has the potential for more, quality tourism products and experiences to appeal to many of the emergent tourist groups.

The Maine Woods has identifiable strengths such as:

- Offers a wide range of experiences and landscapes over a large geographic area. Tourists can easily travel from rugged coasts to rivers, lakes, and mountains. The region includes urban areas, rural communities and remote landscapes.
- Situated in close proximity to large urban markets and the Maine Coast. The Maine Woods can provide a place for connecting to nature, and is in easy reach of population concentrations such as New York, Boston, Montreal, and Quebec City.
- Represents an enormous outdoor recreation playground, crisscrossed by motorized and non-motorized trails. The landscape is filled with rivers, lakes, valleys and mountains, with seemingly unlimited opportunity for adventure outdoors on land and water, for a multitude of activities in all four seasons.
- The people of the Maine Woods have an entrepreneurial spirit. Combined with leadership, organization, and financial support, Maine Woods communities could leverage the visitor economy to create sustainable benefits for the region.

The Maine Woods will need to focus on destination development and address the challenges of the region, and capitalize on emerging opportunities. This will not be without challenges, and would represent a significant 'cultural shift' in some communities in the Maine Woods. However, the region does have an incredible authentic charm, that will be very appealing to significant segments of the emerging cohorts of global travelers.





## 6.0 ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents.

To learn more about Future iQ, and our recent projects **visit [www.future-iq.com](http://www.future-iq.com)** or by email at **[info@future-iq.com](mailto:info@future-iq.com)**



### DAVID BEURLE

As CEO of Future iQ, David specializes in creating future planning approaches for the use in regional, community and organizational settings. David has worked in the field of regional economic and tourism planning for over 20 years.



### LEHNA MALMKVIST

Lehna is a trained biologist and has extensive experience in the interface between people and the landscape. She works within multi-disciplinary teams across a wide range of projects, and uses her skills to ensure that innovative, whole-system approaches are integrated into projects.



### JIM HAGUEWOOD

Jim Haguewood specialises in stakeholder and community engagement that utilises asset based principles and tools, such as SMART strategies. He has a solid track record in developing measurement systems and plans that are practical, understandable and implementable.



### HEATHER BRANIGIN

With over 20 years in local government and the nonprofit sector, Heather is an accomplished research analyst. She applies the integration of future trends, data analysis and public engagement into implementable foresight studies and strategy development.



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