

FUTURE OF TOURISM - THE MAINE WOODS

PART 2: POTENTIAL SCENARIOS & IMPACTS

This report provides an analysis of potential future tourism industry development in the Maine Woods Region. It also includes the future scenarios of tourism industry outcomes of the Destination Rally held in Greenville on 17 May 2018, which explored future potential scenarios for tourism development. This report has been prepared by Future iQ as part of the Maine Woods Consortium's rural destination development program.

December 2018



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Technical Note: Because there is currently no firm boundary defining the Maine Woods Region, data in this report draws from two separate and slightly different geographies. Macro-level demographic and economic data is based on a 7-county area including: Oxford, Franklin, Somerset, Piscataquis, Penobscot, Aroostook and Washington counties. Tourism-specific data is based on the five Maine Office of Tourism "regions" including Maine's Lake's and Mountains; Kennebec Valley; Maine Highlands; Aroostook; and Downeast-Acadia.

The ideas and recommendations presented have been developed by Future iQ, and may not reflect the views of the Maine Woods Consortium.

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TABLE OF CONTENTS

Foreword	4	5.0 Expected and Preferred Futures.....	27
2.0 The Maine Woods –		5.1 Expected Future - ‘Steady as she goes’	27
A Region in Economic Transition.....	5	5.2 Preferred Future – Woodland Ideal	28
2.1 The Maine Woods – Projections of Existing		5.3 Moving from Expected to Preferred	29
Population and Workforce Trends	6	5.4 Possible Regional Pathways to ‘Woodland Ideal’	30
2.2 Role of the Traditional Forest Industry.....	7	5.5 Factors that will support	
2.3 Role of the Tourism Industry.....	8	pathway to ‘Woodland Ideal’	31
2.4 The Maine Woods – Tourism’s Current		6.0 The Maine Woods –	
Regional Economic Impact	9	Unlocking the tourism potential	32
2.5 The Maine Woods – current visitor profile	10	6.1 Tourism’s Role in Economic Transformation	32
3.0 New Approach - High Potential		6.2 Capitalizing on Emerging Tourism Trends	33
Rural Destination Areas	11	6.3 Potential economic impacts	
3.1 Mahoosucs-Maine West	12	of a growing tourism industry	34
3.2 Rangeley Lakes	13	6.4 Potential economic impacts of	
3.3 Maine’s High Peaks	14	the ‘Woodland Ideal’ future.....	35
3.4 Kennebec Valley	15	6.5 Potential exponential impacts	
3.5 Moosehead Lake	16	of investing in the ‘Woodland Ideal’ future.....	36
3.6 Katahdin Region.....	17	6.6 Woodland Ideal - Baseline Goals for 2030	37
3.7 St. John Valley.....	18	7.0 Recommendations.....	38
3.8 Downeast Lakes	19	7.1 Focus on Innovative Product Development	39
3.9 Bold Coast.....	20	7.2 Focus Destination Marketing on Emerging Markets	40
4.0 Hypothetical scenarios of the future	21	7.3 Engage Local Leaders	41
4.1 Scenario Development Framework	22	7.4 Catalyze Collaborative Regional Scale Investment ...	42
4.2 Scenario A – Hit and Miss	23	7.5 Focus on Sustainable Destination Management	43
4.3 Scenario B – Woodland Ideal	24	8.0 Regional Tourism Case Studies	44
4.4 Scenario C – North Woods ‘A la Carte!’	25	8.1 Bend, Oregon	44
4.5 Scenario D - ‘Steady as she goes’	26	8.2 Leavenworth, Washington	46
		9.0 About Future iQ	48
		10.0 References	49





»»»»»»»» 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 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.

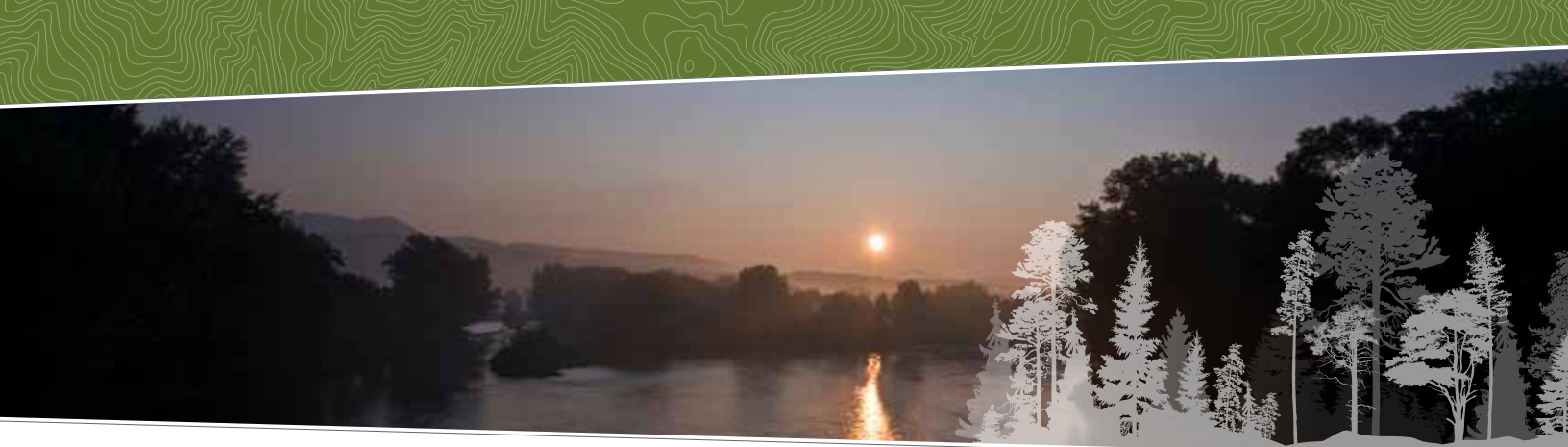
The Maine Woods Consortium is a network of non-profit organizations, businesses, and state agencies dedicated to advancing a "triple bottom line" approach to enhancing human and environmental well-being in the Maine Woods region. Consortium partners are working to build economic vitality in the Maine 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.mainewoodsconsortium.org and www.future-iq.com

David Beurle
CEO, Future iQ

December 2018





2.0 THE MAINE WOODS – A REGION IN ECONOMIC TRANSITION

The Maine Woods is a term used to describe the western, northern and eastern regions that include the state's vast forested areas and the communities that surround them. It consists primarily of the inland mountain and lakes regions of the State of Maine, encompasses the farmlands of Aroostook County and the state's unorganized territories, and extends to the Downeast coast in Washington County.



The Maine Woods region consists of many remote and rural areas that are facing significant challenges due to declines in employment in the traditional wood products manufacturing sector. The advent of mechanization in timber industries, and the closure of several large mills, has seen direct employment in forestry and timber related industries decline. At the same time, productivity per worker has increased dramatically. While the timber industry produces significant product, the contracting employment base has undercut the economic vitality of many timber dependent communities.

The long-term challenge for the Maine Woods region is to deliver meaningful economic diversification that creates new employment and business opportunities.

Tourism is one promising industry for the Maine Woods region, and is currently a substantial contributor to the Maine Woods economy. Current Maine Woods visitation is estimated at 15.6 million visitors annually. (Source: Maine Woods Area 2017 Regional Tourism Impact Estimates). Parts of the Maine Woods region vary greatly in visitation, due in part to their proximity to population centers, and their existing ability to deliver visitor services and experiences. For example, the Maine's Lakes and Mountains region attracted 4.3 million visitors in 2016, with well-established attractions and service centers. Other areas lack well-defined and known destinations, or lack well developed access and amenities. Destination development could encourage additional economic development across the region.

The Maine Woods offers large tracts of relatively intact, primarily private, remote working forests that provide recreational opportunities. This resource has significant future potential to support new generations of outdoor recreation and tourism industries compatible with forest management.



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KEY POINTS TO NOTE:

- Increasingly, outdoor recreation enthusiasts are dominated by younger generations coming from large urban centers and international markets.
- 2017 Maine Office of Tourism visitor surveys have identified a range of niche market visitor interests for the Maine Woods, including outdoor recreation and unique rural and scenic experiences.





2.1 THE MAINE WOODS – PROJECTIONS OF EXISTING POPULATION AND WORKFORCE TRENDS

While there have been encouraging trends in visitation to the Maine Woods region, there are concerns about underlying economic and demographic trends. The following analysis is based upon research and direct data from the State of Maine and **assumes a continuation of the current economic and demographic trends for the next decade.**

Without strategic intervention, economic and demographic projections for the Maine Woods region are not encouraging. This is consistent with many rural areas and resource-based economies across the United States. Long-term trend lines suggest the possibility of declines in population, workforce, and business establishments. The following projection analysis is based on state data for the seven counties that make up the Maine Woods region – Oxford, Franklin, Somerset, Piscataquis, Penobscot, Aroostook, and Washington.

Existing long-term regional demographic trends will lead to declines in population and workforce. This will have knock-on impacts on the number of local businesses and regional economic vitality.

THE MAINE WOODS – EXISTING REGIONAL DEMOGRAPHIC, WORKFORCE AND ECONOMIC PROJECTIONS

Regional Economic Indicators (County Data)	Methodology and Underlying Assumptions	2016	2026 projection
Population	Applying same decline as projected for the whole State of Maine	410,284	400,284
Labor force 20-54	Projections based upon State of Maine demographic projections	237,154	206,712
Employment	59% labor force participation rate for 2026	154,900	136,940
Number of businesses	Decline estimated by ratio of employment per firm	10,670	9,420

Source: US Census, American Community Survey, 2012-2016 Estimates; Maine Department of Labor, DOL; US Small Business Administration

While these projections are well documented, they are by no means a foregone conclusion. There are many macro variables that may change this trajectory, including stronger national and regional economic performance. In addition, existing local efforts and investments are exploring new approaches to add value to the economy.



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KEY POINTS TO NOTE:

- The data and analysis presented assumes no significant strategic intervention, but that existing trends continue. The forecasts are driven in large part by an aging population, and reflect the broader Maine trends.
- Existing upward trends for outdoor recreation and tourism, offer the opportunity to create new economic activity that could help reverse some of these trends.





2.2 ROLE OF THE TRADITIONAL FOREST INDUSTRY

The Maine forest products economy and outdoor recreation and tourism industry have been cornerstones of the State's economy and lifestyle for generations. 89% of the total state land base is forest land (17.6 million acres) of which 90% (15.9 million acres) is privately owned and managed.



One unique and cherished feature of the state's commercial forest lands is a tradition of open and expansive access for public use. Maine's commercial forest land owners have been generous allowing this access and a willingness to co-exist with residents and visitors for recreational experiences. This relationship is a 'one-of-a-kind' in the US and should be respected by all stakeholders.

The economic viability of the Maine Woods region and communities will require a co-existence and mutually beneficial relationship between the forest products and tourism and outdoor recreation industries. Commercial forest lands in the Maine Woods can generate economic value from the variety of wood fiber as well as world class hunting and fishing opportunities, thousands of miles of motorized and non-motorized trails, and the sheer scale of undeveloped forest lands that define the region's character.

Respecting Maine's commercial forest land base, with open access for outdoor recreation, should be a primary objective of the Maine Woods Consortium and State government. To be successful, all stakeholders will need to adopt and commit to a set of guiding principles.

- The Maine Woods and commercial forest lands are a cherished asset of Maine residents
- The forest products and tourism and outdoor recreation industries need to co-exist. and have a mutually beneficial relationship to maintain the economic viability of rural communities.
- Commercial forest land owners, conservation entities, residents and visitors relationships are built upon respect and a desire to achieve mutual benefits and goals.
- All Maine Woods stakeholders and interested parties will maintain open, honest and consistent communication.

The Maine Woods can be a sustainable base for a thriving and important forest and tourism economy.



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KEY POINTS TO NOTE:

- In 2016 the forest products industry created over \$8.5 billion in economic impact, concentrated mostly in the Maine Woods Region. The State's tourism industry, which created \$6 billion of economic impact in 2017, is currently mostly concentrated in the southern and coastal regions.
- There is little doubt that the combined economic value of the forest and tourism economy could grow to help spur economic vitality across the Maine Woods region.

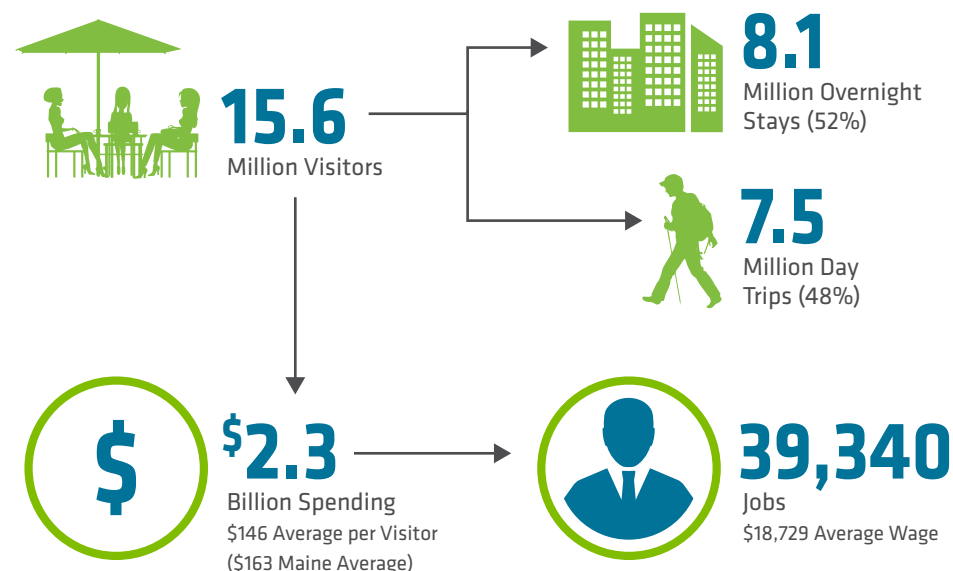




2.3 ROLE OF THE TOURISM INDUSTRY

In 2018, the Maine Office of Tourism contracted with Davidson Peterson Associates (DPA) to prepare a 2017 regional tourism impact estimate for the Maine Woods. This report identified the Maine Woods as the Lakes and Mountains, Kennebec Valley, Maine Highlands, Aroostook County, and Washington County tourism regions. For the purpose of the economic and social impact assessment, this report is the primary benchmark for the tourism industry in the Maine Woods region.

THE MAINE WOODS – CURRENT TOURISM ECONOMIC IMPACT (2017)



The Maine Woods region has recently seen an increase in visitation. The challenge is to translate this to a strong increase in spending associated with the visitor economy.

Maine Woods Visitor Economy
31.6% of visitors and 38.25% of visitor spending in the State of Maine

Source: Maine Office of Tourism, 2017 Annual Report and Tourism Highlights Summary



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KEY POINTS TO NOTE:

- The Maine Woods tourism industry is a multi-billion dollar industry, however the economic impact is spread over a relatively large area.
- The average visitor spend per visitor is relatively low by comparable industry benchmarks, and reflects the tradition of self-contained repeat visitors.



2.4 THE MAINE WOODS – TOURISM’S CURRENT REGIONAL ECONOMIC IMPACT

The Maine Office of Tourism (MOT) Designated Tourism Regions economic impact estimates are developed from the 2017 MOT Maine Woods report, and the aggregate total of five similar economic impact reports for each of the MOT Designated Tourism Regions. These regional estimates include large cities near the destination areas, for example, the Kennebec Valley region includes Waterville, Maine Highlands includes Bangor and Maine’s Lakes and Mountains includes the Lewiston Auburn area. The following tables are a summary of the MOT’s five regional tourism studies (2016) and the Maine Woods regional report (DPA 2017).

Tourism has a considerable economic impact. The challenge is to capture even greater economic impact and value, especially in the outlying parts of the region.

MOT Designated Tourism Regions (2016)	# of Visitors	Total Spending	Average Visitor Spending
Maine Lakes & Mountains	4,300,000	\$621 million	\$144
Kennebec & Moose River Valley	2,600,000	\$304 million	\$117
Maine Highlands	4,390,000	\$856 million	\$194
Aroostook County	1,400,000	\$157 million	\$112
Downeast	5,300,000	\$930 million	\$175
Total Maine Woods Region (2017)*	15,600,000	\$2,300 million	\$147

* This entry is from a MOT Maine Woods 2017 report which removes the Bar Harbor/Acadia visitor and spending value. The figures are estimates.

MOT Designated Tourism Regions (2016)	Jobs	Total Earnings	Average Earnings
Maine Lakes & Mountains	12,138	\$234,317,320	\$19,304
Kennebec & Moose River Valley	5,004	\$97,404,406	\$19,465
Maine Highlands	14,714	\$280,128,838	\$19,038
Aroostook County	2,784	\$53,242,069	\$19,124
Downeast & Acadia	16,019	\$302,195,936	\$18,864
Total Maine Woods Region (2017)*	38,994	\$736,800,000	\$18,729

* This entry is from a MOT Maine Woods 2017 report which removes the Bar Harbor/Acadia jobs and earnings. References Maine Office of Tourism, 2016 Regional Tourism Impact Estimates, Maine Woods Area.



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KEY POINTS TO NOTE:

- Average earnings are Future iQ estimates based on division of Total Earnings by number of jobs
- In aggregate, the Maine Woods Region attracts nearly 15 million visitors per year.
- The broader Maine Woods tourism industry employs nearly 40 thousand people, however these jobs are generally concentrated in the larger population centers.



The Maine Woods relies on repeat, budget conscious, regionally based visitors. There is enormous potential for tapping into new emerging markets of higher spending visitors.

2.5 THE MAINE WOODS – CURRENT VISITOR PROFILE

The current Maine Woods visitation is dominated by repeat visitors, who come from the North East region of the USA. These visitors take advantage of the natural landscapes, recreation offerings and food and beverage experiences. Data indicate that in many cases they are seeking a low cost experience.

MAINE WOODS VISITORS ARE YOUNGER AND HAVE LOWER HOUSEHOLD INCOMES

- Overnight visitors to the Maine Woods area are on average 39 years old and have annual household incomes of around \$89,000. About two-thirds have a college degree and are employed full-time.
- Overnight visitors to the Maine Woods area are younger and have lower household incomes than overnight visitors to the State as a whole.
- Day visitors to the Maine Woods Area are 43 years old, on average, and have annual household incomes of \$71,000. Half have at least a college degree, and half are employed full-time.
- Day visitors to this region have average household incomes that are lower than day visitors to the State overall.

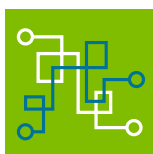
MAINE WOODS HAS A HIGH PERCENTAGE OF REPEAT VISITORS WHO MOSTLY COME FROM LOCAL MARKETS

- 80% of day visitors to the Maine Woods area are U.S. residents, with the highest proportion originating from Maine.
- 90% of day visitors to the Maine Woods area are repeat visitors, similar to the State of Maine as a whole.
- Half of overnight visitors to the Maine Woods Area are from New England, and 75% of overnight visitors to the Maine Woods are repeat visitors, with a higher % than Maine overall coming from Mid-Atlantic and Canada.
- The Maine Woods Area attracts a greater proportion of first-time visitors as compared to the State.
- 75% of overnight visitors intend to return to Maine within the next two years.

MAINE WOODS VISITORS ARE ATTRACTED BY THE LANDSCAPE AND LOCAL ACTIVITIES

- Overall, the primary drivers of travel to the region are touring/sightseeing and food/beverage/culinary interests
- Active outdoor activities and history/culture activities are more important travel drivers among overnight visitors to the Maine Woods area as compared to overnight visitors to the State.
- Visitors to the Maine Woods are more likely to enjoy the mountain views, view wildlife or birds, view fall colors, and take tours of communities. They are less likely to be enjoying the ocean views or rocky coast.
- Overnight visitors to the Maine Woods region are more likely to visit Farmer's Markets, enjoy local food at fairs/festivals, or eat farm-to-table/organic cuisine than are overnight visitors to Maine as a whole.
- The most common active outdoor activity among overnight visitors to the Maine Woods is hiking/climbing/backpacking, and recreational motor boating.
- Camping, riding all-terrain vehicles, hunting, skiing, and snowshoeing are all more popular among overnight visitors to the Maine Woods Area than among visitors to the State as a whole.

SOURCE: The visitor profile for the Maine Woods has been drawn from the Maine Office of Tourism Visitor Tracking Research 2017 - Maine Woods Areas Special report (June 2018)



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IDEAS TO CONSIDER:

- The visitor experience in Maine is very positive, with 80% of overnight visitors and 88% of day trippers having plans of definitely returning to Maine in the near future. (Maine Office of Tourism 2016).
- The Maine Woods potentially offers an enticing 'undiscovered' location, which will be particularly appealing as other renowned outdoor destinations reach capacity or 'over-visitation' stages of their destination life-cycle.



3.0 NEW APPROACH - HIGH POTENTIAL RURAL DESTINATION AREAS

Without creative intervention, the well documented demographic and economic trends and projections will reshape the State of Maine. For the Maine Woods area this is potentially more serious due to declining employment in the traditional forest industry and distance from major service centers.

The status quo and current trends predict a negative and undesirable future. However, this is only one possible scenario, and there are also significant potential new opportunities in the regional economy. This includes further expansion of advanced wood products, yet undeveloped natural resource industries, and the rapid global expansion of outdoor recreation and tourism development. The challenge is to take a new approach and unlock high potential industry opportunities within a long-term sustainable framework.

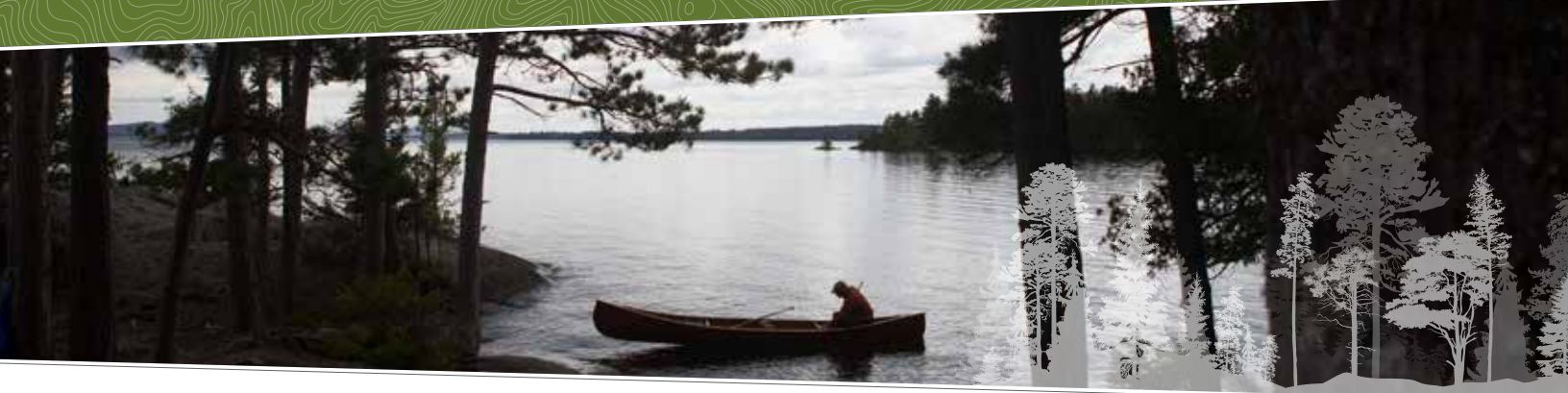
There is no doubt that tourism and recreation offer the potential for significant economic growth in the region. In order to bolster tourism related economic development in the region, The Maine Woods Consortium has identified nine High Potential Rural Destination Areas (HPRDA), which offer considerable amenities for visitors, to be the focus of destination development. These areas have been identified by the Maine Woods Consortium as having a concentration of assets, interests, and capacity needed to emerge as important drivers of the region's destination tourism economy – and where local leaders are actively working to capitalize on those assets for the benefit of their community.

These exceptional areas are similar in respect to their rural nature and small-town service centers. With regard to their current service capacity, attraction development and potential destination development, they are at vastly different stages.

The following section outlines the key features of each of the High Potential Rural Destination Areas. Many of these areas already have destination development work occurring, and are at various points on their trajectory to build stronger tourism economies. They all share the potential, over time, to offer highly attractive destinations to both domestic and, with marketing, international visitors.

Nine areas have been identified as having high potential for destination focused development in the Maine Woods.





3.1 MAHOOSUCS-MAINE WEST

This region is the western most of the HPRDA's located near the New Hampshire border and north of Sebago Lake. Anchored by the skiing and recreation hubs of Bethel and Newry, the Maine West area stretches south to Paris, Norway and the Oxford Hills, and north to the papermill town of Rumford and the River Valley.

FEATURES OF THE REGION INCLUDE:

- Sunday River Ski Resort as an anchor destination business with significant marketing and lodging capacity – as well as multiple other local alpine and Nordic ski centers
- Bethel as a well-established destination community attracting visitors with year-round events
- Oxford Hills serves as a gateway/service center for the area
- Rumford has a distinct character as a planned mill town with an active paper mill
- Natural features include the Androscoggin River, Grafton Notch State Park, and parts of the White Mountain National Forest
- The new Maine Mineral and Gem Museum is poised to emerge as a significant attraction
- Location is closer to population centers than many other potential destinations



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KEY POINTS TO NOTE:

- Due to the established lodging capacity and developed visitor services infrastructure and experiences this area attracts families and above average length of stays.
- Significant trail and outdoor recreation infrastructure is being developed in the area, and existing organizing capacity exists through the Maine West collaborative.





3.2 RANGELEY LAKES

A Maine Woods travel destination for 150 years anchored by the village of Rangeley, the Rangeley Lakes region is famous for fishing and outdoor recreation amid beautiful lakes and undeveloped ponds, vast conservation lands, and working forests. The region is north of the Maine West region near the New Hampshire and Canadian borders and spans the northern portions of Oxford and Franklin Counties.

FEATURES OF THE REGION INCLUDE:

- Extensive conservation land and recreation infrastructure maintained by Rangeley Lakes Heritage Trust, Phillips Memorial Preserve Trust and New England Forestry Foundation-Pingree Forest Partnership.
- Several classic Maine sporting camps and the Rangeley Inn provide a variety of traditional and enhanced “higher-amenity” visitor services
- Rangeley Lake State Park and four popular private campgrounds serve the region.
- Lodging, shops, restaurants, and a movie theater concentrated in downtown Rangeley
- Significant winter snowmobile activity as well as nordic ski trails and work underway to re-open the Saddleback Ski Resort.
- Rangeley designated as a trail town - Appalachian Trail and Northern Forest Canoe Trail
- Classic, historic fishing destination
- Three outdoor-related museums: Outdoor Sporting Heritage, Maine Forestry Museum and Rangeley Historical Society



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KEY POINTS TO NOTE:

- Organizing capacity exists through Rangeley Lakes Heritage Trust, Rangeley Chamber of Commerce, and Rangeley Economic Opportunity Community.
- The area is currently working with the Trust for Public Land on a regional visioning initiative.





3.3 MAINE'S HIGH PEAKS

From the gateway college town of Farmington, Maine's High Peaks stretch north and west through Kingfield, Carrabassett Valley, and Stratton, and south to encompass a largely undeveloped mountain region that includes 10 of Maine's highest peaks.

FEATURES OF THE REGION INCLUDE:

- Sugarloaf has served as an anchor visitor destination since the 1970's with significant marketing and lodging capacity
- Home to 10 of Maine's highest mountains and extensive hiking opportunities including the Appalachian Trail
- Maine Huts and Trails provides high quality hut-to-hut skiing, hiking, paddling and mountain biking opportunities
- Dynamic mountain bike community and increasingly developed trail infrastructure through the Carrabassett Valley Trails Collaborative
- University of Maine at Farmington offers a 4-year resort management degree
- Fly Rod Crosby trail and Maine's High Peaks Scenic Byway



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KEY POINTS TO NOTE:

- Maine High Peaks trademark is held by Maine Appalachian Trail Land Trust and available for use by area businesses – in conjunction with a related business “tool box”.
- Existing organizing capacity through Greater Franklin Development Corp. and the High Peaks Network and other area collaborations.





3.4 KENNEBEC VALLEY

Extending north from Skowhegan to Jackman and the Canadian border, the Kennebec River is the spine of a recreation area built on traditional hunting and fishing and further developed around the whitewater rafting industry in The Forks. This area also is home to a growing agricultural community and related culinary attractions. The region primarily consists within and is characterized by the Kennebec River valley from Jackman to Skowhegan.

FEATURES OF THE REGION INCLUDE:

- The Kennebec and Dead Rivers offer quality rafting experiences with Class III to V whitewater and established businesses to provide visitor service and experience
- Kennebec River, its tributaries and other remote ponds and waterways offer fishing and flatwater paddling opportunities including the 30-mile Moose River Bow trip
- Moxie Fall is Maine's highest single drop waterfall at 90 feet
- Strong arts community with the Lakewood Theater and Skowhegan School of Painting and Sculpture
- Old Canada Road Scenic Byway
- Maine Grains is an established hub for agricultural and culinary activity in the service center community of Skowhegan



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KEY POINTS TO NOTE:

- Limited lodging and visitor service capacity resulting in a higher than average percentage of day trips and shorter length of stays.
- Active work is underway to capitalize on TIF funding to support expansion of both water and land-based recreational infrastructure.





3.5 MOOSEHEAD LAKE

From the center of Maine's largest lake, the Moosehead Lake region extends 25 miles in all directions to include the communities of Greenville, Rockwood, Beaver Cove and Monson and hundreds of thousands of acres of conserved working forest land. Moosehead Lake is split by the boundary between Somerset and Piscataquis Counties with the majority of visitor experience and services in Piscataquis.

FEATURES OF THE REGION INCLUDE:

- At nearly 40 miles long, Moosehead Lake provides a unique big-lake experience with a majority of shoreline under permanent conservation
- Major investment initiative by the Libra Foundation concentrating on establishing Monson as destination artists village
- Appalachian Mountain Club's Maine Wood initiative with multiple lodges and significant recreational infrastructure on 70,000 acres of conserved forest land
- Annual Seaplane Fly-In serves as a unique and high profile local event
- Work underway to re-open Moose Mountain ski area
- Established branding and destination development initiative with new wayfinding system and investments in downtown Greenville amenities
- Local chamber of commerce transitioning to become Maine's first rural Destination Marketing Organization (DMO)



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KEY POINTS TO NOTE:

- High level of seasonal residency and higher than Maine average day trips – possibly due to limited overnight lodging capacity
- Existing organizing capacity through the Moosehead Lake Region Economic Development Corporation and work to establish Destination Moosehead Lake as a Destination Marketing Organization.





3.6 KATAHDIN REGION

Encompassing Baxter State Park, the new Katahdin Woods and Waters National Monument, and the West and East Branches of the Penobscot River, the Katahdin Region is anchored by Millinocket in the south and extends north to Patten and Matagamon. The region sits in the northern portion of Penobscot County with Bangor as the major population center. Millinocket is approximately 72 miles from Bangor via I-95.

KEY FEATURES:

- Natural resource amenity rich area with Baxter State Park, gateway to Allagash and North Maine Woods, Whitewater rafting on the West Branch of the Penobscot River
- Katahdin Woods and Waters National Monument designated in 2016 – 87,000 acres of forest and the East Branch of the Penobscot
- New hiking and biking trail infrastructure under development, including multi-million dollar investment in Maine Waterside Trails
- Katahdin Woods and Waters Scenic Byway extends the full length of the area
- Two snowmobile clubs, New England Outdoor Center and Five Lakes Lodge are key to maintaining snowmobile trails, which draw overnight visitors as well as day-trippers from the Bangor regions.
- Maine Outdoor Education Program engages thousands of area students in outdoor activities every year
- Significant local organizing underway to craft and implement a new regional vision encompassing both the forest products industry and outdoor recreation and tourism



DataInsight

KEY POINTS TO NOTE:

- Limited lodging and visitor service capacity resulting in a higher than average percentage of day trips and shorter length of stays.
- Dynamic energy and organizing capacity through multiple initiatives including Our Katahdin, Katahdin Collaborative, Katahdin Tourism Partnership, Katahdin Area Trails and others.





3.7 ST. JOHN VALLEY

From Allagash Village, the St. John Valley extends east along the Canadian border through Ft. Kent and Madawaska to the village of Hamlin and south through the Deboullie and Fish River Lakes. The region is located in the very northern territory in Maine and shares a unique, French Acadian culture with communities across the border in Canada.

KEY FEATURES:

- Distinctive asset is the Acadian culture – more in common with Canada than the south – recent hosting of World Acadian Congress
- Fishing, hunting, and snowmobiling anchor the recreation economy and complement the core agricultural economy.
- Gateway to the North Maine Woods and Bureau of Public Lands' Debouille Unit (remote trout ponds, trails, camping)
- Snowmobiling mecca with national recognition and draw
- Four major Nordic Ski Centers offer winter activities and host major international Nordic skiing and biathlon events
- Special events including the Can-Am dog-sled race, Muskie (fishing) tournament, Ploye festival, International snowmobile weekend, etc
- End point and service center for multi-day canoe tripping on the Allagash Wilderness Waterway -- terminus of Northern Forest Canoe Trail



DataInsight

KEY POINTS TO NOTE:

- The area has limited lodging and visitor service and is the most remote of Maine's destination area resulting in lower annual visitation levels.
- Organizing capacity through Aroostook County Tourism and experience hosting large numbers of people through international cultural and sporting events.





3.8 DOWNEAST LAKES

From Lincoln to Danforth and south to Grand Lake Stream, the innumerable rivers, lakes and ponds of the Downeast Lakes region make it a classic Maine destination for fishing, canoeing, and experiencing nature. The region is located in the remote areas of northeast Penobscot County and northern Washington County. Grand Lake Stream is approximately 118 miles from the Bangor area.

KEY FEATURES:

- Large, interconnected systems of lakes, ponds and waterways
- Classic fishing destination – Grand Lake Stream nationally recognized fly-fishing destination with the highest concentration of working guides in the state
- Hundreds of thousands of acres of conserved working forest land – including lands around Niatous Lake and the East Grand Lake and Pond Cove Community Forests
- The village of Grand Lake Stream features several traditional sporting camps and highest concentration of working Maine Guides in the state
- Gateway business and development opportunities in the Lincoln Lakes region



Data**Insight**

KEY POINTS TO NOTE:

- This area is the most remote and underdeveloped of any of the destination areas. Grand Lake Stream and Lakeville each have populations slightly over 100 residents.
- Very limited lodging and visitor service capacity. Most visitors to the area are camping or bring their own lodging and services.





3.9 BOLD COAST

Where the Maine Woods meet the Maine Coast, this region follows the Bold Coast Scenic Byway from Millbridge to Lubec – the eastern-most point in the United States. The region is located on the coast of Washington County and north of the highest visited locations in Maine, Acadia National Park and Bar Harbor.

KEY FEATURES:

- Uniquely undeveloped forested coastline, blueberry barrens, small coastal villages, and larger hub communities including Eastport, Lubec and Machias.
- Tourism opportunities on the Bold Coast scenic byway, Lighthouse Trail and Maine Fisheries Trail
- Growing support and infrastructure to support bicycle tourism – building on successful 2016 Bike Maine event
- Coast camping and hiking available at Cobscook State Park and Cutler Public Reserve Land
- Campobello- Roosevelt International Park accessed through Lubec – opportunity for two-nation vacation with neighboring New Brunswick.



DataInsight

KEY POINTS TO NOTE:

- High level of day trip visitation due to proximity to the Acadia National Park and its surrounding lodging capacity.
- Existing organizing capacity through Downeast Acadia Regional Tourism, Sunrise County Economic Council and Washington County Council of Governments.





4.0 HYPOTHETICAL SCENARIOS OF THE FUTURE

As part of a commitment to build local capacity in High Potential Rural Destination Areas (HPRDA), the Maine Woods Consortium hosted a 'Destination Rally' in Greenville, Maine on May 17, 2018. This attracted groups from most of the HPRDA's for a creative think-tank type approach to explore regional destination development potential. As part of the background research, organizers identified Visitor Markets and Product Development as the major drivers that will shape the tourism industry in the Maine Woods, and in each of the HPRDAs. These major drivers were viewed as encapsulating the key sets of strategies that could be deployed to build the regional tourism industry. They also reflect the findings in the 'Future of Tourism' (Future iQ 2018) work that explores emerging trends.

These two macro drivers represent continuums of approach, with organizers describing end points as:

- Visitor Markets – explores end points ranging from:
 - **Traditional Markets** - Focus on maintaining current visitation patterns.
 - **Emerging Markets** - Aggressive focus on new US markets within and beyond New England and the mid-Atlantic; and explore opportunities to connect to international visitors
- Product Development - explores end points ranging from:
 - **DIY / Rustic / Outdoors** - Most visitors self-organize and are self-reliant for food and accommodation – activities focus on self-guided outdoor activities such as: hiking, fishing, hunting, snowmobiling, etc. Current infrastructure is maintained with some enhancements, and accommodation development focuses on campsites, RV parks, and rustic cabins. Marketing activities focus on social media, and individual and niche interest group communications.
 - **High Touch / High Service** - Visitors seek added amenities, a variety of curated experiences, and a concierge approach to professionally guided activities including fully serviced outdoor, culinary, events, and education experiences. Includes, destination resort development nodes (3-4 Star full service), including extended stay opportunities and infrastructure enhancements in venues, sites, transportation, etc.

These continuums formed the basis for a scenario matrix that defines four scenario 'spaces', or quadrants. These quadrants were used to formulate four plausible outcome scenarios. This allows an exploration of expected outcomes if certain approaches are pursued based on the broad axes of Visitor Markets and Product Development.

The scenario approach allows stakeholders to speculate about the implications of broad strategies, and when and where benefits will accrue.



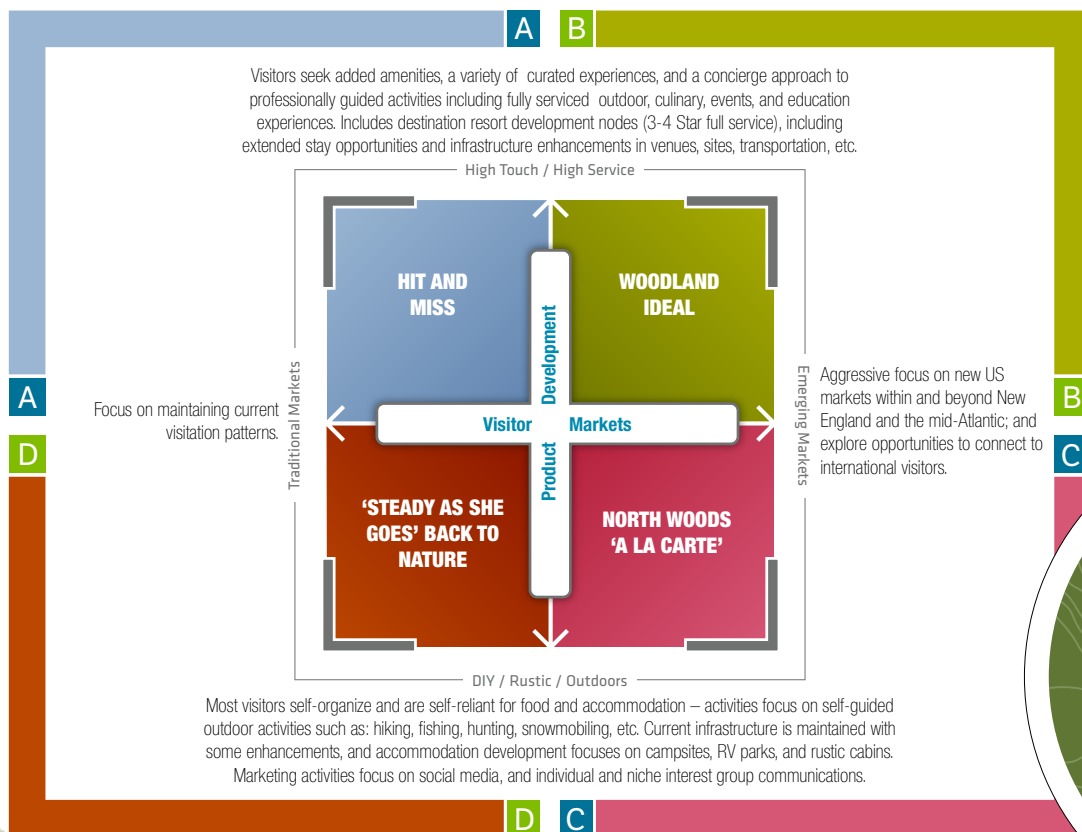


4.1 SCENARIO DEVELOPMENT FRAMEWORK

These brief descriptions are attached to the end points of each driver axes. While these end points do not necessarily represent two extremes on a linear continuum, they are distinct enough to suggest some degree of separation, and a plausible range of outcomes between them. The four quadrants (scenario spaces) based on different combinations of the two axes themes, were explored by Rally participants to create four scenarios by investigating the description of the end points included in each scenario space. The possible interaction between these axes define the four scenario spaces. The main attributes of each quadrant were explored to begin to articulate how tourism in the Maine Woods would look in a future based on each of the quadrants.

Each scenario has its own consequences and impacts on the fabric of the Maine Woods Region – impacting the community, economy, and environmental fabric in different ways. These four scenarios paint very different plausible futures for tourism in the Maine Woods Region. A narrative description of each scenario was developed by the Destination Rally participants.

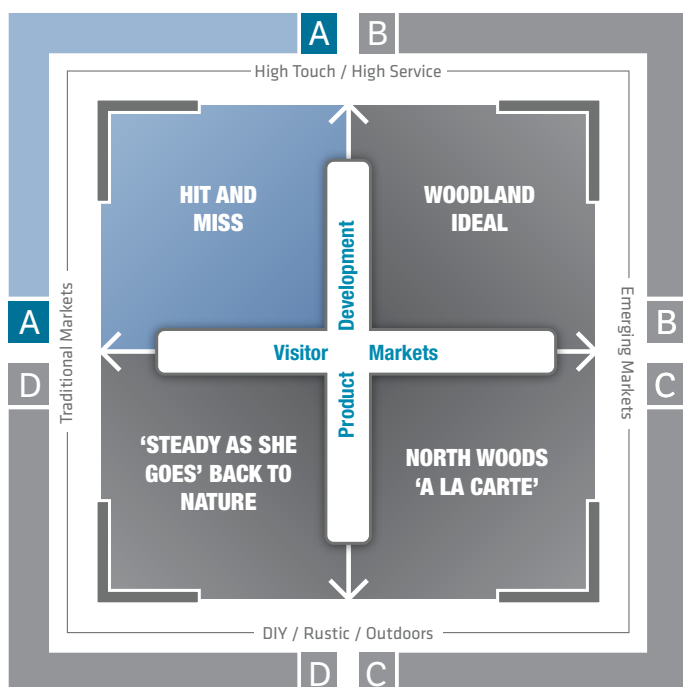
The scenario matrix represents different possibilities for the future and allows us to consider implications and limitations of each future.



Scenarios names have been modified slightly from Greenville workshop output, to create consistency.



4.2 SCENARIO A – HIT AND MISS



This future is shaped by a combination of a focus on traditional visitor markets, and a move to a high touch / high service product approach. This would create the potential for greater visitor spending, as there is a higher level of service offering. However the outcome is likely to be 'Hit and Miss' as there may be a fundamental disconnect between the traditional visitor spending habits and the product offering. Some locations and destinations will prosper, but the market size within the traditional visitor base may be too small to allow large scale success. In addition, the traditional markets will likely begin to decline over the coming decades, as baby boomers travel less and seek less adventurous experiences.

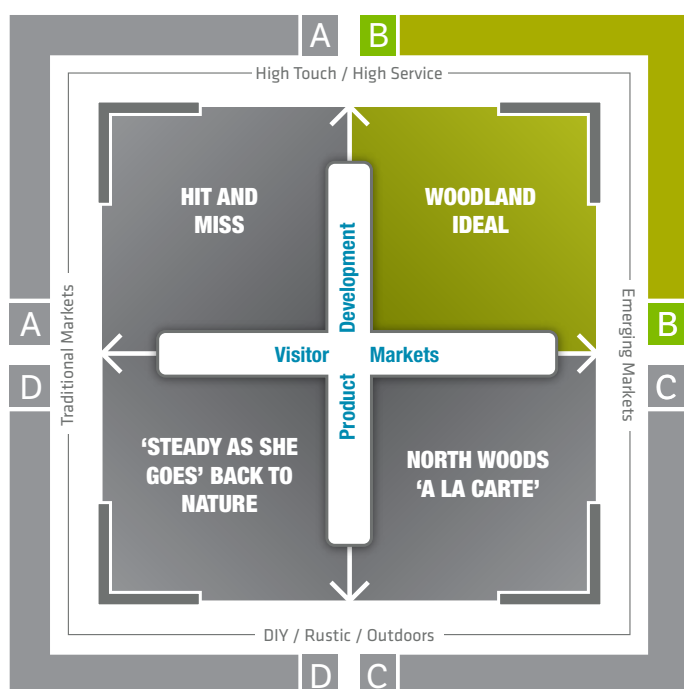
SCENARIO IMPLICATIONS:

- Potential for additional high-quality product offering, that could prosper in some existing higher amenity locations that currently attract higher spending visitors.
- Indulgence experiences, catering to aging and more affluent regional travellers could be successful. There might be business 'churn' where new ventures start and fail, due to lack of patronage or inability to operate year-round.
- Likely to create positive environmental outcomes as the impact of the resource base would be limited.
- Visitor numbers could see eventual decline over time, as traditional traveller age and travel less, further exacerbating population declines in the more remote locations.





4.3 SCENARIO B – WOODLAND IDEAL



This future is shaped by a combination of a focus on emerging markets, and a move to a high touch / high service product approach. This future will primarily be driven by visitors attracted from emerging markets, who will be seeking that unique highly curated and luxury or experiential trip. Product development would be targeted to the interests and tastes of younger urban based populations, and the affluent retired global traveler. Visitors would be attracted by the unique outdoors and recreation experience, but having the high amenity 'base-camp' from which to explore. This future would potentially create short adventure stays connected to the cruise lines visiting the coastal ports. This future would also see travelers who have a deeper interest in nature and learning experiences. Likely there will be the potential for more year-round tourism and stronger shoulder season visitation.



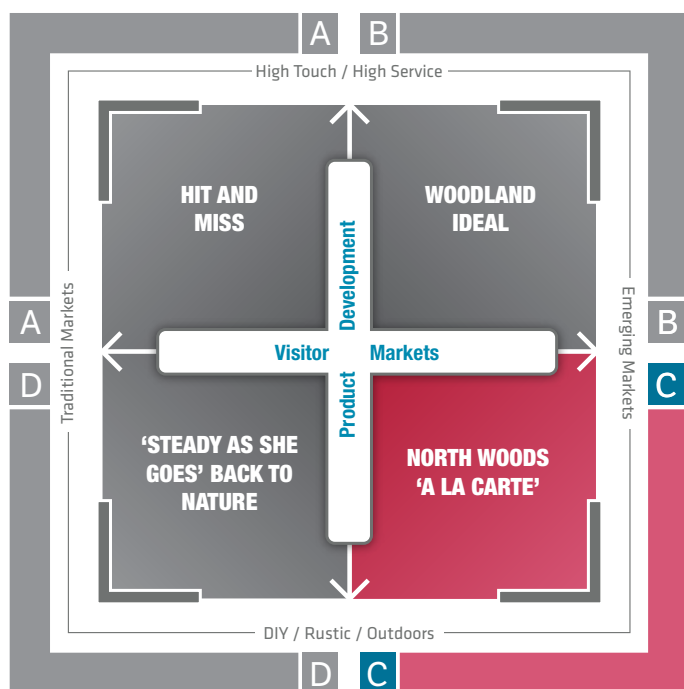
SCENARIO IMPLICATIONS:

- This scenario would see a very different type of visitor being added to the regional mix, in many cases these visitors would be international travelers who are savvy and sustainability conscious. This could bring interesting new perspectives, and could create some friction with long term visitors or locals.
- This future would see significant investment in new product development, especially higher quality accommodation options, associated infrastructure of guided tours and dining options, and experiential packages. Marketing would target affluent global and national travelers looking for an original and 'undiscovered' experience.
- In this scenario, there would be increased opportunity for entrepreneurial ventures, and owner operated tour services that offer adventure, educational and leisure activities.
- Potential conflicts could emerge over the access and use of resources, and having tour groups embedded in a working forest environment. There might be more congestion in iconic destination locations.





4.4 SCENARIO C – NORTH WOODS ‘A LA CARTE!’



This future is shaped by a combination of a focus on emerging markets, and a reliance on traditional rustic DIY outdoor activities. This future is primarily going to be driven by the available product offering, and will attract those travelers who seek self-guided, outdoor activities. This product offering will have appeal to existing visitors, but it is uncertain how large the emerging market opportunity will be. Marketing dollars will promote the region to emerging markets, as one of the few remaining real frontier experiences. There would be limited investment in infrastructure, mostly oriented to basic amenities and facilities, and likely servicing the forest industry as well. This future would be unlikely to significantly support an increase in year round population, and will be a seasonally driven industry.



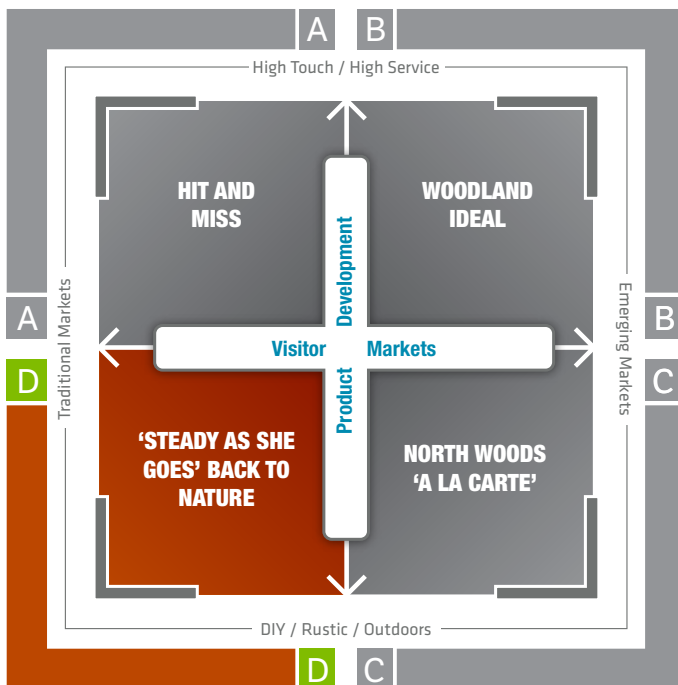
SCENARIO IMPLICATIONS:

- This scenario would attract new visitors, who would likely share the locals' DIY approach to use of the outdoor amenities, with a focus on hunting, hiking, fishing, snowmobiling and rugged adventure activities.
- These visitors are likely to not be big spenders, and operate in a self-contained manner. This would create some, but not significant new economic stimulus.
- There would be little investment in product development, rather the industry would utilize the existing trails and recreation areas. Attracting additional visitors from new markets could exacerbate overuse issues in population locations, and result in some degradation of resources as the use will be unmanaged.
- Destination management will be largely un-coordinated, and the focus would be on destination marketing.





4.5 SCENARIO D - 'STEADY AS SHE GOES'



This future is shaped by a combination of a focus on traditional markets, and a reliance on traditional rustic DIY outdoor activities. This future is primarily going to be driven by traditional visitors who are mostly from within the Northeast, and are older and repeat visitors. The industry is likely to stay highly seasonal, with summer being the peak months. The unplanned approach to product development would likely see continued dispersed camping and traffic, as people seek rustic experiences away from population centers. This scenario might at first deliver some economic gains, with increased visitation. But as the traditional visitor profile ages, the number will drop off, and the impact will decline. The associated visitor economy will remain familiar, with businesses supporting hunting and snowmobiling pursuits.

SCENARIO IMPLICATIONS:

- This future offers no dramatic change in product offering or visitor profile, and would retain a familiar comfort for existing residents and visitors. This would allow for a happy co-existing of the timber and tourism industries.
- It is possible that visitor numbers could increase in this scenario, at least in the short term, as retirees and baby boomers vacate more. The low-cost DIY approach means that the economic impact will be somewhat limited.
- Investment in marketing would likely be limited and focused on traditional repeat visitors, who are travelling from the north-east region.
- Longer term, this future could see decline in numbers, as traditional travelers age out, and the basic destination assets don't match future market demands.
- The unplanned nature of the destination development could lead to some environmental impacts of abandoned camps and waste.



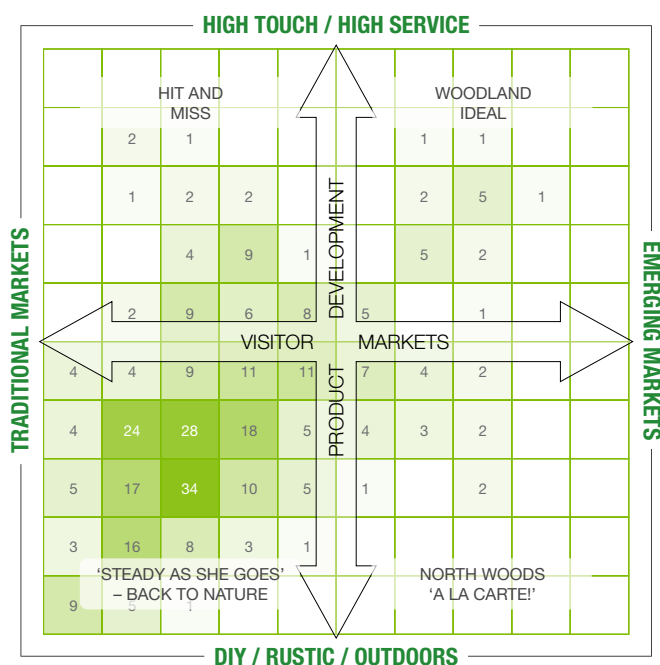


5.0 EXPECTED AND PREFERRED FUTURES

At the conclusion of the scenario development exercise, Destination Rally participants were asked to consider what they believed would be the 'Expected' and the 'Preferred' futures for the Maine Woods in 2030. The Expected Future was the most likely future assuming there was no change in existing direction or trajectory. The Preferred Future was what they believed was the most optimal future for the region. To indicate their choice, participants marked their Expected and Preferred future on a 10 x 10 matrix that overlays the scenario framework. This provides a greater nuanced view of the future, and allows people to move along the axes which represent continuums from the end points.

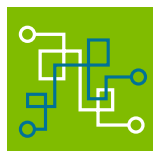
For the Expected Future, the concentration of responses was clearly located in the 'Steady as she goes' scenario, which represents a very status quo approach.

5.1 EXPECTED FUTURE - 'STEADY AS SHE GOES'



The results for the expected future are outlined in the heatmap. For the Expected Future, the concentration of responses was clearly located in the 'Steady as she goes - Back to Nature' scenario, which represents a more status quo approach.

This future would likely face particular challenges in 5-10 years, as many of the existing repeat visitors age and cease to visit the region. It does provide a high level of comfort in that it represents a very familiar future, with little to deal with in terms of change.



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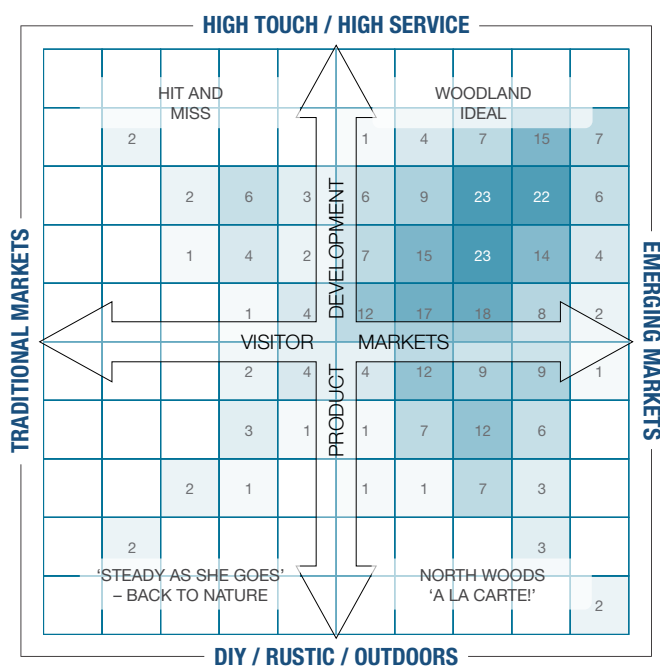
IDEAS TO CONSIDER:

- The concentration of responses shows a high level of alignment between the participants.
- The scenario 'Steady as she goes' paints a future where there is a reliance on traditional markets and product types, and the industry will slowly decline as the visitor ages.



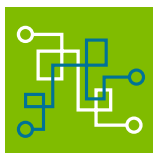
5.2 PREFERRED FUTURE – WOODLAND IDEAL

The results for the Preferred future are outlined in the heatmap. This diagram was created by compiling the individual responses from the workshop participants.



For the Preferred Future, the concentration of responses was clearly located in the 'Woodland Ideal' scenario, which represents an ambitious future that reinvents the regional product offering and captures emerging markets.

The participants were highly aligned in identifying 'Woodland Ideal' as the optimal future looking out to 2030. This future represents significant change, with a focus on 'High Touch / High Service' and 'Emerging Markets'. The underlying view was that this future would create sufficient additional economic activity, such that the Maine Woods region would achieve a change in trajectory for economic and population trends.



IDEAS TO CONSIDER:

- The concentration of responses shows a high level of alignment between the participants, and significant appetite for change.
- This future represents a significant change from the status quo, and highlights the excitement that stakeholders have about the potential for the regional tourism economy.

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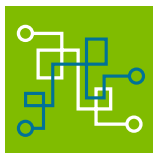
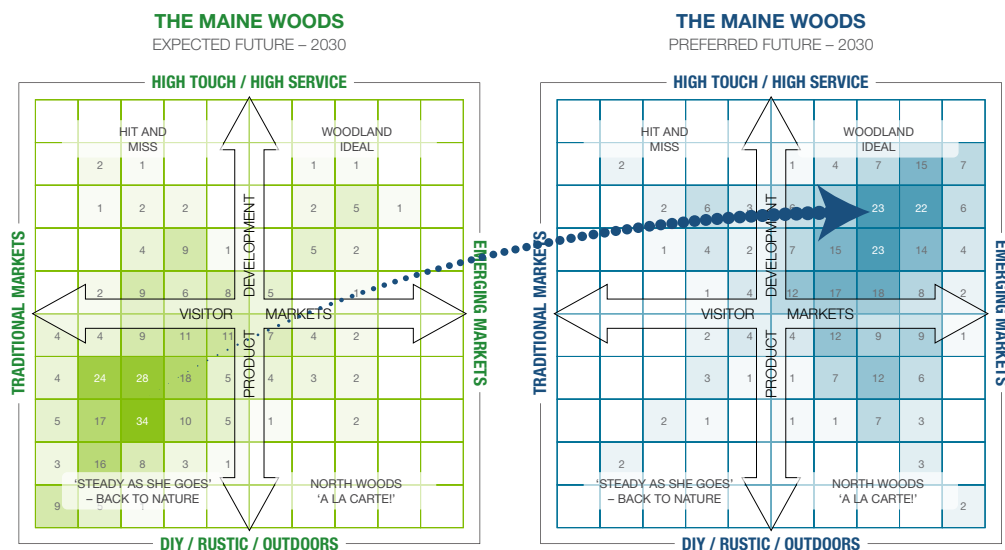
5.3 MOVING FROM EXPECTED TO PREFERRED

The roadmap between the Expected and Preferred future will require careful thought and investment. The trajectory between the Expected and Preferred will need to be considered. In some regional locations, where product exists, an initial investment in capturing emerging markets might make sense. In regions where there is an absence of suitable product, the initial steps may more logically require product development work.

SOME KEY POINTS TO CONSIDER INCLUDE:

- Overall, there is desire for significant movement on both axes - towards exploring Emerging Markets and creating more High Touch / High Service tourism product.
- Both these directions will require significant investment in infrastructure and marketing over time and careful attention to building the regional reputation and collaboration.

The heat maps for the Expected and Preferred futures create a compelling case for action in destination development and market development for the Maine Woods.



IDEAS TO CONSIDER

- The Woodland Ideal future provides a tantalizing view of how the Maine Woods could become a dynamic tourist destination. This future is well supported by emerging macro trends as people seek new ways to connect to nature.

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- Moving into an industry that attracts and services Emerging Markets will require careful consideration of the cultural environment in the region. The shift from traditional visitors to new types of visitors will require cultural sensitivity and understanding.





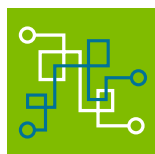
5.4 POSSIBLE REGIONAL PATHWAYS TO 'WOODLAND IDEAL'

During the Destination Rally, the workshop broke into groups representing each HPRDA. These group sizes varied from 5-10 key stakeholders. Each group plotted on the scenario framework where they believed they were as a starting point (Expected) and the likely progression they could make over time towards the Preferred Future. While this was a quick and simple exercise, it does provide an insight into a 'self-assessment' of each HPRDA. Locations like Moosehead Lake are currently perceived locally to have greater access to emerging markets and more high touch/ high service product.



The scenario process lays out a framework to help create customized tourism development plans for each individual HPRDA, based on their current status and potential.

The HPRDA's have defined slightly different pathways, based on different starting points and perceptions, however their overall trajectory is consistent. This highlights the value of collective planning and coordination of efforts over the coming years. It also reinforces the point that each HPRDA is different and will need different initial support. Additional work is required to better understand a feasible speed of change, and better understanding of the size of the investment required within each HPRDA. It is clear that some of the HPRDAs will have a much 'heavier lift' over time to achieve significant change in their industry.



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IDEAS TO CONSIDER:

- While the number of participants representing each HPRDA at the Destination Rally were relatively small, the exercise provides a good starting point for discussion about individual regional strategies.
- Some HPRDA are more advanced in their existing work, hence the different starting point for their trajectory, and different potential by 2030.



5.5 FACTORS THAT WILL SUPPORT PATHWAY TO ‘WOODLAND IDEAL’

The scenario analysis helps define the potential and implications of different trajectories, from a largely status quo approach, to a more aggressive approach to destination development and market expansion. Activating the regional economy and key stakeholders will take time and investment. The following table outlines some of the factors that may enable or hinder the progress towards the preferred future, defined as ‘Woodland Ideal’.

To reach their vision, the Maine Woods communities will need to work collaboratively to take new actions, and importantly to attract resources and investment.

What will drive the Maine Woods TOWARDS the preferred future?	What will drive the Maine Woods AWAY from the preferred future?
Leadership at the local, state and Maine Woods Region to achieve the vision.	Relying solely on people and resources from outside the Maine Woods to achieve the vision.
Long-term commitment to developing a compelling storyline that defines the essence of the Maine Woods as a unique destination.	Disconnected and unreliable narratives promoting the Maine Woods or lack of delivery of a compelling storyline.
Expanding the available workforce and expanding volunteer efforts.	Continuation of the aging and declining population resulting a lack of available workers to provide community and visitor services.
Financial systems that support the destination development infrastructure, and capital for enhancement of visitor programs and communications.	Limited availability of financial capital for the implementation of destination marketing, promotion, and product development programs.
Identification and supplementing of critical community services, healthcare, groceries, police/fire, parks, etc. that are needed by both residents and visitors.	Declining or loss of critical community services, especially healthcare and local government services that sustain communities and residents.
Recruitment and nurturing of entrepreneurs, who are willing to invest new capital.	Reluctance of the local communities and their leadership to embrace tourism as a viable new economic activity.

Developing a solid regional reputation requires a strong marketing plan, strategy and execution. This requires funding and consistent investment.





6.0 THE MAINE WOODS – UNLOCKING THE TOURISM POTENTIAL

6.1 TOURISM'S ROLE IN ECONOMIC TRANSFORMATION

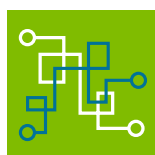
The Maine Woods is an economy in transition. There are several major macro-economic drivers in the region. The timber industry and tourism are key to the future.

The likely scenario for the timber industry, is that it will remain a major economic contributor at the state level, and re-emerge from a paper dominated business to a more diverse industry including emerging products. The recent FOR/Maine analysis and road map responsibly projects an increase from the current \$8.5 billion impact of the forest products industry to \$12 billion by 2025. The number of direct jobs created locally will increase, but will not replace all the paper jobs lost. Automation, increased productivity and the declining direct employment base will factor-in, but there are opportunities for bio-economy industries and advanced wood products. Maine's outstanding forest resource and infrastructure to get wood to market ensure the forest products economy will continue to be a significant driver of the Maine economy, delivering important benefits to the Maine Woods region.

Tourism offers the opportunity for highly impactful new local economic development. It offers the opportunity for small and large-scale businesses and investments, and has a good connection to local land use, culture and tradition. The scenario analysis, and the Future of Tourism work suggest there are some compelling macro trends providing strong tailwinds to the industry at a global and national level. There is also a vast array of natural resources in the region, upon which to build new visitor experiences. However, there are challenges with critical visitor economy infrastructure, especially supporting the high touch / high service end of the continuum.

Importantly, a tourism and outdoor recreation economy can also help create the business and employment base that will attract new residents to the region. This is a critical underlying strategy to sustain and build the region. This approach has been well articulated in some of the local regional destination work currently underway in Maine Woods, including locations such as Moosehead Lake. In this way, the tourism economy offers great promise for the region, and can help attract younger visitors, entrepreneurs and potential residents.

The tourism economy offers an opportunity to rebuild local economies and community fabric. It can support numerous entrepreneurial outdoor activities and is potentially highly compatible with the traditions of the region.



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IDEAS TO CONSIDER:

- Outdoor adventure tourism requires and demands the human experience and touch.
- The rising global population and wealth is triggering a wave of new generation tourists who seek authentic outdoor experiences. The Maine Woods has the potential to become well suited to this market.





6.2 CAPITALIZING ON EMERGING TOURISM TRENDS

The background analysis, coupled with the scenario analysis undertaken at the Destination Rally, point to the critical role that tourism especially the outdoor recreation segment plays in the future economic vitality of the Maine Woods region. The Destination Rally strongly supports the proposition that tourism and recreation development in the Maine Woods needs to focus on pivoting to build 'High Touch / High Service' products, aimed at 'Emerging Markets' and affluent travelers. This adds new dimensions to the existing tourism economy, that offers great future potential. It must be noted that this does not replace the existing more traditionally focused visitation economy, but complements this established sector. Expansion of broadband connectivity is vital here.

There are a number of broad external and internal trends that are strongly supportive of building the proposed new dimensions to create a vibrant outdoor tourism industry. These include:

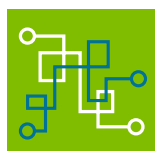
- Strong trend towards highly curated packages for younger city-based travelers and affluent retirees.
- An emerging global middle-class that is seeking authentic outdoor experiences and want high quality attentive service.
- Technology that is allowing regions to promote themselves on a global stage and connect with travelers in new ways.

The supportive local trends include:

- The emergence of the 'Gig economy' and remote working help provide the opportunity for people to live within the region, enjoying the recreation opportunities, while working in tourism industry opportunities, or working remotely on a seasonal or permanent basis.
- The clear interest and appetite for industry growth being expressed by local stakeholders in the region, as demonstrated by the Destination Rally and local planning efforts.
- The interest of outside philanthropic and not-for-profit groups, who have identified Maine Woods as both an area of need, but also of great potential.
- Private sector investment by industry leaders including New England Outdoor Center, the Blair Hill Inn, Rangeley Inn, ski resorts, sporting camps and more.

The scenario analysis completed with stakeholders at the Maine Woods Consortium Destination Tourism Rally offers a platform by which destination development strategies can be developed, and investments prioritized to utilize tourism as a tool to improve the economic conditions for the region.

It is important to capitalize on emerging supportive trends and build these into the recommended strategies.



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IDEAS TO CONSIDER:

- The Maine Woods region has the opportunity to 'leap-frog' their tourism industry development, by directly targeting the desired emerging tourism segment.
- Becoming a savvy destination for discerning travelers will take rethinking how the region presents itself to the world.



These projections of positive economic impacts are extremely encouraging, especially the potentially compounding impact of simultaneously increasing visitor numbers and spend per visitor in the Woodland Ideal future.

6.3 POTENTIAL ECONOMIC IMPACTS OF A GROWING TOURISM INDUSTRY

Forecasting industry growth based on broad scenarios can be somewhat problematic. Numerous variables are at play, and assumptions about growth can be hard to accurately quantify. As a benchmark analysis, the Oregon Tourism industry is used, as this industry offers some good comparative characteristics for the Maine Woods region, including potential for outdoor recreation and resource-based economies.

CASE STUDY: SELECTED ECONOMIC IMPACTS OF THE TOURISM INDUSTRY OREGON (2003-17)

Oregon Tourism Industry Impact	2003	2017	Total Change (%)	Annual Growth (%)
Taxes (State/Local)	\$246 million	\$539 million	119%	5.76
Direct Employment	84,500 jobs	112,200 jobs	33%	2.05
Employee Earnings	\$1.7 billion	\$3.3 billion	94%	4.85
Visitor Spending	\$6.5 billion	\$11.8 billion	82%	4.35

Source: OREGON TOURISM COMMISSION ANNUAL REPORT FY 2017-2018

To understand the potential impact of growth in the Maine Woods Tourism economy, the following analysis explores forecasts based on changes in visitor spend and number, for each scenario. The following analysis assumes the 2017 baseline for the Maine Woods of 15.6 million visitors and \$147 spend per visitor.

THE MAINE WOODS – POTENTIAL SCENARIO GROWTH FORECASTS

Growth Forecast over 2017 Baseline		2030 Forecasts (in 2017-dollar value)		
Scenario	Hit and Miss	Woodland Ideal	North Woods 'A la carte'	Steady as she goes
% Annual growth in Visitor Numbers	0%	3%	3%	0%
% Annual Increase in average visitor spend	2%	4%	2%	1%
Number visitors (million)	15.6	22.9	22.9	15.6
Average spend per visitors (\$)	\$190	\$245	\$190	\$167
Total visitor spending (\$Billion)	\$3.0	\$5.6	\$4.4	\$2.6

Source: Authors assumptions and calculations

Assumptions used include:

- High Touch / High Service delivers higher visitor spend (4% annual growth in Woodland Ideal), but this is less impactful in the 'Hit and Miss' scenario, as it is still targeting less affluent existing markets. (As a comparison, in 2017, international visitor spending in Oregon increased by 8% over 2016, compared to US national average of 5%.)
- Focusing on emerging markets delivers 3% growth in visitor numbers per year, versus zero from focusing exclusively on traditional markets.





6.4 POTENTIAL ECONOMIC IMPACTS OF THE 'WOODLAND IDEAL' FUTURE

The Woodland Ideal future is defined by coupling together the focus on emerging markets and moving to a high touch / high service product approach. In considering the potential cumulative economic impact of the Woodland Ideal scenario, it is assumed that the more curated higher service product offering will drive increased visitor spending. Under the Woodland Ideal scenario, it is likely the Maine Woods will support two main visitor categories. There will still be the existing Maine Woods repeat visitors, who seeks the lower-cost rustic outdoor experience; and, the emerging market visitor looking for the unique premium experience. The emerging market visitor offers the potential to drive economic growth. The rate of growth will depend on multiple factors such as broader global economic conditions, availability of appropriate product, and the success of destination marketing activities. To explore the potential growth rates and their economic impact, the following four growth rate versions have been developed. In all cases, the increased growth rate of visitor numbers is coupled tightly with increased average visitor spend, as defined by the Woodland Ideal scenario. The analysis assumes the Maine Woods 2017 baseline of 15.6 million visitors and \$147 spend per visitor.

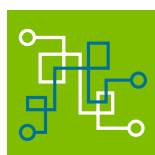
Against a background of a strong US economy, and a rapidly growing global tourism industry, the Maine Woods Region has the potential to capitalize on the Woodland Ideal future to drive substantial economic growth.

GROWTH RATE VERSIONS OF THE WOODLAND IDEAL SCENARIO

Woodland Ideal Scenario	2030 Forecasts (in 2017-dollar value)			
Growth rate versions	Slow Growth	Modest Growth	Solid Growth	Exponential Growth
% Annual growth in Visitor Numbers	1%	2%	3%	4%
% Annual increase in average visitor spend	2%	3%	4%	5%
Number visitors (million)	17.8	20.2	22.9	26.0
Average spend per visitors (\$)	\$190	\$216	\$245	\$277
Total visitor spending (\$Billion)	\$3.4	\$4.4	\$5.6	\$7.2

Source: Authors assumptions and calculations

The reality is likely to be some mix of these forecasts, and real-life is rarely a linear experience. However, the forecasts demonstrate the broader economic potential of investing an industry that attracts the higher spending emerging market visitors.



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IDEAS TO CONSIDER:

- These projections do not include a variation in the mix of day trippers to overnight stays. However, tapping into emerging markets could see a boost in longer stay adventure traveler numbers, delivering even greater economic value.
- Overnight visitors to Oregon spent \$279 per person per trip in 2017 (Dean Runyan Associates 2018), suggesting the Maine Woods estimates are conservative, and there is considerable upside potential.





6.5 POTENTIAL EXPONENTIAL IMPACTS OF INVESTING IN THE 'WOODLAND IDEAL' FUTURE

The Woodland Ideal future has identified some unique additional opportunities for the Maine Woods region. These opportunities potentially add whole new dimensions to the Maine Woods tourism economy. Captured in the right way, these opportunities will create exponential impacts and growth. Some of the opportunities that will drive exponential impacts include:

Emerging markets focus:

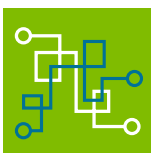
- The Woodland Ideal future scenario sees the Maine Woods region targeting the emerging markets, which offer enormous potential. International visitation has increased from 25 million trips per year in 1960, to 1.3 billion in 2017, and this is forecast to increase exponentially. The Maine Woods has the opportunity to offer a unique, uncrowded outdoor experience, in a visitor world that is becoming more congested and overcrowded.
- The younger generations are becoming increasingly concentrated in denser urban settings. The national and international trends of outdoor adventure recreation is largely fueled by people seeking a vacation or weekend break for such urban settings. The abundance of trails and outdoor landscapes makes the Maine Woods an ideal landing place of for the adventure seeking younger generations.

High Touch / High Service product approach:

- The global middle class is growing rapidly, with disposable income. This younger middle class is also increasingly seeking curated experiences. The high touch / high service aspect of the 'Woodland Ideal' future positions the Maine Woods region as a destination that offers well organized packages, that mix pleasure and leisure. This market segment will allow industry operators to offer premium priced packages, that will drive higher visitors spending and create better returns and jobs.
- The Woodland Ideal future brings with it the need to have investment in higher quality infrastructure like resorts, but it also can trigger investment in associated aspects such as culinary experiences, educational opportunities, outdoor adventure equipment providers, transportation systems and personal services such as spas and indulgence experiences.

These factors would suggest the potential for exponential growth, beyond the baseline forecasts. However, this will require strategic investment and careful repositioning of the Maine Woods Region.

The Woodland Ideal future offers a compelling proposition for travelers seeking a unique outdoor adventure, coupled with a bit of luxury. This future also offers multidimensional entrepreneurial opportunity for new product development.

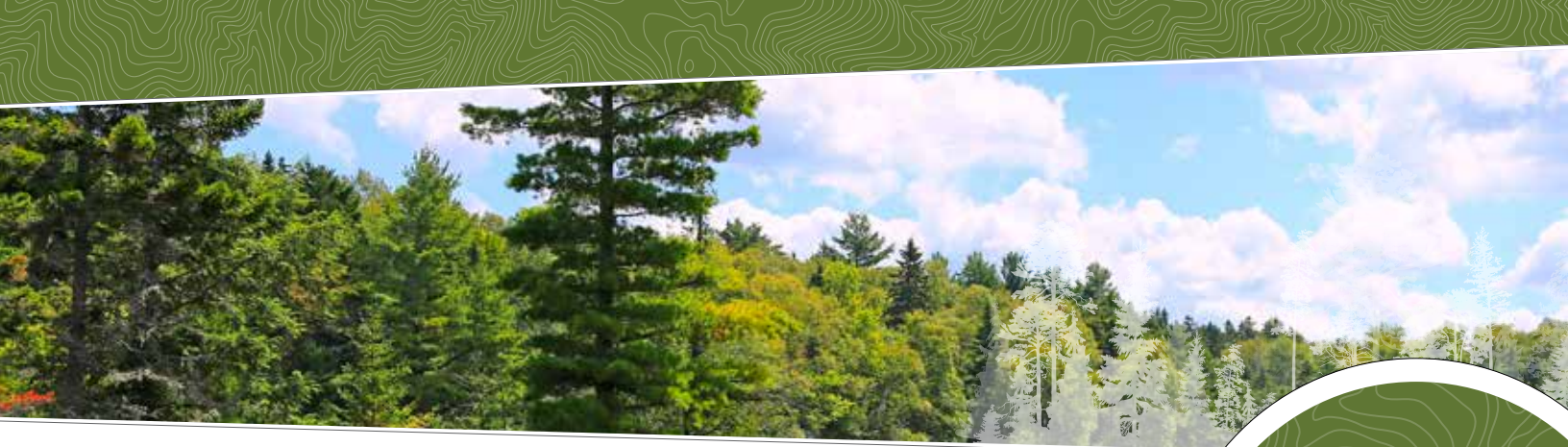


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IDEAS TO CONSIDER:

- The Woodland Ideal future may look a long way from the existing Maine Woods visitor profile, but it is much closer to the emerging global travel market and trends.
- The Woodland Ideal future would likely result in increased number of visitors who stay longer and spend more. This will drive exponential growth in the economic and social impact of the tourism industry.





6.6 WOODLAND IDEAL - BASELINE GOALS FOR 2030

The nine Maine Woods High Potential Rural Destination Areas (HPRDA) have unparalleled natural features and a unique Maine Woods culture. They are quite diverse and have different current status and potential for progress over the next decade.

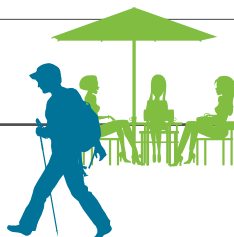
The following goals represent an aggregate total for the Maine Woods region, based on 'Solid Growth' forecasts for the Woodland Ideal scenario. These goals would be met by primarily focusing on attracting new, higher spending visitors to the region – based on existing data from relevant state Tourism Regions, who will be interested in longer terms adventure and luxury stays. Achieving these goals will contribute significantly to improving economic conditions and halting potential population and economic decline. Note, targets are based on MOT tourism region's which extend beyond the core Maine Woods region.

Aligning stakeholders around this key set of baseline goals, and building stakeholder support will be a critical initial step. The region also has the very real potential to outperform these baseline goals.

2017 Status

2030 Goals

15.6
Million Visitors

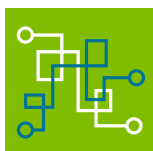


22.9
Million Visitors

\$2.3
Billion Tourism
Spending



\$5.6
Billion Tourism
Spending



IDEAS TO CONSIDER:

- The Maine Woods region can reverse declines in population and jobs trends by improving visitor products and experiences, by creating an additional \$3.3 billion in annual economic value by 2030.

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- This will require people being willing to think differently about their region, and to aggressively pursue investment and marketing opportunities.





7.0 RECOMMENDATIONS

The Maine Woods region is at a pivotal time in its history in relation to the tourism and outdoor recreation industry. The opportunity exists to get ahead of the curve and determine how tourism will develop in the short and medium term. With the expansion of visitor markets caused by the global middle class, and the large population cohorts of Baby-Boomers and millennials, the Maine Woods region stands to achieve unprecedented visitation rates, if it prepares well.

To achieve the 'Woodland Ideal' future, the following strategic recommendations and actions are designed to help achieve long-term sustainable growth and deliver value to the Maine Woods region.

SUMMARY OF BROAD STRATEGIES AND ACTIONS

Strategic Recommendations	Recommended Actions
Focus on innovative product development	<ul style="list-style-type: none">• Work with each HPRDA on unique place-based product development.• Focus product development on complementary experiential curated travel packages.• Encourage new accommodation types and supply.
Focus destination marketing on emerging markets	<ul style="list-style-type: none">• Develop an overarching unifying Maine Woods marketing strategy.• Capture the unique Maine Woods character and appeal.
Engage local leaders	<ul style="list-style-type: none">• Bring elected officials and industry leaders to the table.• Highlight the economic impact of tourism to local residents.
Catalyze collaborative regional scale investment	<ul style="list-style-type: none">• Convene private and public funders to focus on the Maine Woods region.• Create systems to get visitors out of high use coastal zones into Maine Woods destinations.
Focus on sustainable destination management	<ul style="list-style-type: none">• Build in the principles of sustainable destination development.• Protect working forests and environmental treasures.

The strategic recommendations are rooted in the potential for exponential growth in visitor markets and product development in the Maine Woods Region.





7.1 FOCUS ON INNOVATIVE PRODUCT DEVELOPMENT

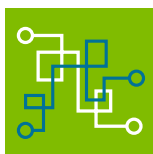
The Maine Woods has a remarkable array of assets that make up its current tourism industry. Each area within the region has its own story within this context. How these assets are leveraged and developed for enjoyment will be key to product development and long-term use. Because many Maine Woods assets are yet to be tapped, stakeholders have the opportunity to guide their development by creatively managing how and when these assets are enjoyed. The following recommendations are meant to prompt innovative product development that promotes responsible stewardship of Maine Woods assets while at the same time providing the personalized experiences sought by the new traveler.

RECOMMENDED ACTIONS:

- **Work with each HPRDA on unique place-based product development.** The product development approach for each destination area should be built on local assets and include local stakeholders early in the process. The approach of deploying destination development “studios” has proven very successful in similar locations, and should be pursued. The region is blessed with incredible trail and recreation infrastructure, much of which is under-utilized.
- **Focus product development on complementary experiential curated travel packages.** These should target the new and emerging markets, and focus on high touch / high service experiences. Packaging together products like culinary, location-specific extreme sports, and luxury indulgence provides the opportunity to create high value ‘customized’ packages.
- **Encourage new accommodation types and supply.** Accommodation type and quality in Maine Woods does not yet fully support the Woodland Ideal future. There is the potential to develop a cross section of accommodation options for the higher spending traveler who is looking for longer stays and quality experiences.

Product development is at the core of the Woodland Ideal future. However, the pivot from the traditional low-cost rustic ‘do-it-yourself’ industry that currently exists, to a more curated and higher quality product offering will take time and significant investment. There is evidence of where this is already happening in the region, for example some of the existing and planned investments in the Moosehead Lake region. Focusing on high quality and unique product development will help set the Maine Woods region apart as a worthy destination for the traveling explorer.

Each region in the Maine Woods has an original story and product that contributes to the overall Maine Woods identity and experience.



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IDEAS TO CONSIDER:

- Innovative product development will require a significant shift from the current focus accommodating rustic, self-organized travel to high touch, high service travel experiences.
- Curated packages are important to millennials and the emerging global middle class, who in general do not want to self-organize travel experiences.





7.2 FOCUS DESTINATION MARKETING ON EMERGING MARKETS

The Woodland Ideal future is dependent on being able to reach and attract higher spending visitors from new and emerging markets. The profile of the current visitor to the Maine Woods is heavily skewed to local, repeat, low spending visitors. While this creates a lot of familiarity and is a comfortable easy-to-serve market segment, it does not drive economic development or new businesses. The global and national visitor market is growing exponentially. The vast unspoiled nature of the Maine Woods Region makes it potentially very attractive to the segment of the travelers looking for an original experience.

RECOMMENDED ACTIONS:

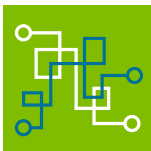
- **Develop an overarching unifying Maine Woods marketing strategy.** It is recognized that the Maine Woods is comprised of a range of distinctly different locations and regions. A unified marketing strategy for the Maine Woods can achieve the critical mass required, and differentiate the unique regional sub-brands and experience nodes across the broader region.
- **Capture the unique Maine Woods character and appeal.** The Maine Woods offers something unique in a global context. It is a real-world experience, and presents layers of original gritty experience, thoughtful environmental awareness, and co-operative co-existence of different industries and world views. Weaving these features together into a compelling narrative will help to propel the reputation and appeal of the region to the discerning traveler.

The focus of destination marketing should be on emerging and potential markets. 75% of existing visitors are repeat visitors, and marketing to traditional visitors is likely to yield little economic value. The challenge will be for the Maine Woods to see itself through the lens of the international traveler and discover its uniquely quirky charm.

Maine Woods has the opportunity to present a compelling narrative to global visitors who are looking for a unique location, that has yet to be discovered or overcrowded.

“Twenty years from now you will be more disappointed by the things that you didn’t do than by the ones you did do. So throw off the bowlines. Sail away from the safe harbor. Catch the trade winds in your sails. Explore. Dream. Discover.”

- Mark Twain, Author



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IDEAS TO CONSIDER:

- An overarching regional identity will help define the Maine Woods region and position each sub-region as a unique destination.
- Due to the swelling numbers of domestic and international travelers, many iconic outdoor recreation destinations are now reaching a ‘tipping point’ of overcrowding and over-capacity. Maine Woods can offer a new alternative for those seeking new outdoor experiences.





7.3 ENGAGE LOCAL LEADERS

The analysis suggests that the Woodland Ideal future would trigger significant positive economic impact. However, this future is very different from the existing tourism industry in the region. By comparison, the expected future, 'Steady as she goes', represents the default future, which is much more familiar to the region. Transitioning to the Woodland Ideal future will require a stretch in many facets of the regional norms and expectations. The cultural shift should not be underestimated, as many traditional resource-based communities can struggle with an influx of people with different perspectives, expectations and behaviors. Involving and educating the local stakeholders, leaders and residents of the value of tourism and the new direction will be paramount to future success. Failure to secure the support of key locals will result in friction and tensions down the track.

RECOMMENDED ACTIONS:

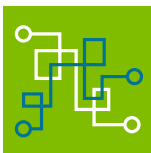
- **Bring elected officials and industry leaders to the table.** The existing leadership and key stakeholders across the Maine Woods play a crucial role in economic and community development. The Woodland Ideal future offers great promise, but will also require adaptability and change at a local level. Having a supportive local leadership will help in the process of funding new initiatives, and helping secure approvals and permits for new destination activities and businesses. The more local leaders can be part of the process, the more likely initiatives will be successful.
- **Highlight the economic impact of tourism to local residents.** Many regional economies are transitioning to have some reliance on tourism. This can create frictions and tension, especially due to the impact of visitation and different forms of land use. Typically, one area that is not understood by locals is the pervasive economic impact of the tourism economy. Educating locals on the full 'value chain' impact can help build local support and enthusiasm for an emerging tourism industry.

Securing local stakeholder and resident support will be critical for long-term development of an expanded tourism industry, especially one that targets new markets and experience-based products.

Pivoting to the preferred future of Woodland Ideal will require a cultural shift in priorities and an open acceptance to change by the local stakeholders.

“No Pain, No Rain, no Maine”

– Common Appalachian Trail saying



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IDEAS TO CONSIDER:

- Making the shift from the expected to preferred future for the Maine Woods will require education about the implications on all levels.
- Tourism, as an economic development tool, has the potential to add billions of dollars of annual revenue, much of which is recycled in the local economies.





7.4 CATALYZE COLLABORATIVE REGIONAL SCALE INVESTMENT

The Woodland Ideal future offers the potential for robust economic growth, but will also require significant investment. Producing a world class experience-based destination, connected to a network of curated outdoor recreation opportunities will require public and private investment. The challenge for the Maine Woods region is the geographic size and scale, and the need to build interconnected experiences. In addition, the existing infrastructure was not designed for the Woodland Ideal future and will need significant in-fill and upgrades. Private and philanthropic investments already demonstrate the interest in the tourism industry. These include investments associated with outdoor education and infrastructure associated with iconic destinations like the Appalachian Trail. The objective should be to trigger simultaneous public and private investment to produce catalytic change at a regional scale.

RECOMMENDED ACTIONS:

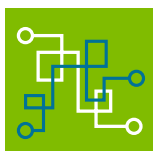
- **Convene private and public funders to focus on Maine Woods Region.** There is great potential in bringing potential funders and advocates together to focus on high potential Maine Woods locations. This will help create catalytic investments and build the necessary scale and intensity of investment.
- **Create systems to get visitors out of high use coastal zones into Maine Woods destinations.** The Maine tourism industry is currently focused on the southern coastal areas. There is a critical need to build the systems to bring visitors into Maine Woods destinations as part of overnight packaged tours. This will require collaborative development between the existing industry, and providers of unique high touch / high service experiences.

Convening key funders will help identify shared high priority locations within the Maine Woods region, and help consolidate the concept of High Potential Rural Destination Areas (HPRDA). Initial collaborative projects can help demonstrate the Woodland Ideal approach and build critical examples of the required product development.

The Woodland Ideal future will require assembling the key players who can trigger the critical mass of investment.

“If there’s one thing the Appalachian Trail teaches, it is low-level ecstasy - something we could all do with more of in our lives.”

– Bill Bryson, *The Lost Continent*



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IDEAS TO CONSIDER:

- New investment will trigger new ideas. The potential of the Woodland Ideal future will depend on creating unique high touch / high services experiences within the Maine Woods Region.
- Philanthropic and private investors have demonstrated their interest in the Maine Woods Region, and have the potential to be a major catalytic force for creating a new type of tourism industry.





7.5 FOCUS ON SUSTAINABLE DESTINATION MANAGEMENT

Much of the focus in the Woodland Ideal future is on initial industry growth and economic development. Experience in regional destination development shows that many nature-based regions can quickly go from industry growth to overcrowding. This phenomenon is exacerbated by the rapid growth in global tourism and domestic travel. The Maine Woods region has a chance to 'get ahead of the curve' and embed the principles of sustainable destination development. Sustainable tourism takes into account broad impacts and benefits on local communities, visitors, cultural assets and the local environment. This is very consistent with the broad Woodland Ideal future, and supports emergent trends in travelers who desire sustainable tourism experiences (Future of Tourism, Future iQ 2018).

RECOMMENDED ACTIONS:

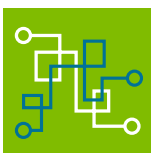
- **Build in the principles of sustainable destination development.** Building in these principles early will help define the nature and character of the destination. These principles are in sync with the social values in the Maine Woods Region, and the open access policies generally applied to commercial and recreation lands. A key part of sustainability is to ensure that the benefits flow to local people and communities.
- **Protect working forests and environmental treasures.** As visitation increases, and a greater monetary value is placed on recreation tourism, it will be important to avoid impacts on the traditional forest products industry. There will be a need to work closely with commercial forest owners and public land managers to ensure conflicts are avoided and co-existence is beneficial. There will also be a need to consider collaborative environmental protections of sensitive locations.

Sustainable Destination Management offers the framework to build economic value, while protecting traditional industries and the environment.

Getting ahead of the tourism overcrowding curve will require the early application of the principles of sustainable destination management.

“At the end, this story is just a numbers problem,...in 1960, when the jet age began, around 25 million international trips were taken. Last year, the number was 1.3 billion.”

– Jonathan Tourtellot, Founder, Sustainable Stewardship Center, August 2018



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IDEAS TO CONSIDER:

- Successful tourism destination management will require forest owners and public land managers to collaborate on land access to visitors and protection of the environment.
- Sustainable tourism destination development will become increasingly important as a tool to manage visitor impact.





8.0 REGIONAL TOURISM CASE STUDIES

8.1 BEND, OREGON

Old Mill Town evolves to a Central Oregon destination for outdoor experiences, culture and lifestyle.

Bend is Central Oregon's largest city and county seat for Deschutes County. Bend is recognized for its natural location on the eastern edge of the Cascade Range and on the Deschutes River. The geographic location enables premier four season outdoor recreation with the river, Mount Bachelor ski resort, Cascade Lakes and the high desert environment.



History

Bend has a long history as an "Old Mill" town, driven by major timber and lumber companies and the Oregon Trunk Railroad. In 1957, Mt Bachelor, Inc. was formed by a small group of locals and today is a primary visitor attraction for outdoor recreation. Mt. Bachelor, in addition to other outdoor infrastructure lead to tourism becoming Bend's #2 economic driver providing attractive skiing, hiking, biking, camping, fishing, rock climbing and general sightseeing experiences.

Today

History in the Bend area has played a catalytic role in creating the downtown district for artisans, restaurants, year around activities including music in Drake Park. The Bend renaissance has occurred through a combination of an attractive year-around lifestyle, work-life-play balance, supported by robust culinary offerings, specialty shopping and events. The most noteworthy lifestyle component that led to the recognition of Bend is the growth and strength of over a dozen craft breweries, particularly Deschutes Brewery, 8th largest in the US.

CURRENT ECONOMIC SNAPSHOT

2016 Population	84,416
% population change, 2000 - 2016	+38.4%
Civilian Labor force 16+ (% total pop.)	44,481 (52.6%)
Median Household Income	\$55,625
Total visitor trips 2015	2,490,000





Visit Bend is the marketing organization with the primary role of attracting visitors to the City. Visit Bend and other visitor attractions are funded by a City transient room tax, with 2017 revenues estimated at \$8.5M. The City of Bend applies a 10.4% transient tax, and the County 8%, on all short-term rental units.

Visit Bend's primary strategies are destination branding, citywide events, conventions and conferences, diversification of tourism offerings, public relations and sustainable tourism messaging. The Financial Year 2018 budget is \$3,100,189 consisting of 63% to marketing, 15% to the visitor center, 8% to group sales, 7% to cultural tourism fund and 7% to general administration.

In 2017, the Milken Institute prepared an updated case study economic analysis of the Bend/Redmond Oregon showing a faster recovery than peer communities. The area's growth has not been consistent in relationship to peer communities, but rather a story of achievement, decline and resurgence.

Lessons learned during the regional economic journey include the following:

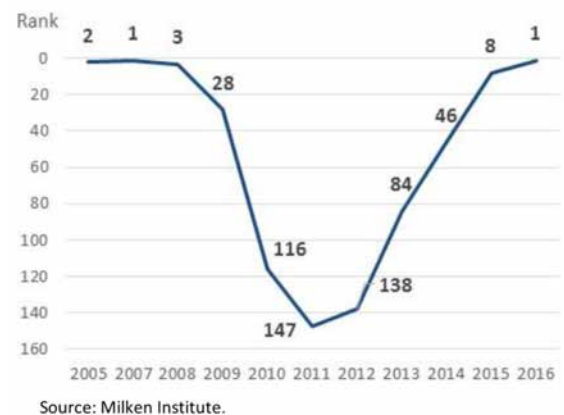
- Diversification comes in many forms, but successful efforts build on existing strengths
- Effective collaboration can help a small region achieve big things
- There is more to an attractive business climate than competitive tax rates and limited regulations, such as quality of place and community characteristics
- Quality of place can be leveraged to yield more than tourism dollars and holiday homes, such as venues, sites and other infrastructure available to residents year around.

Key Actions/Factors for Success

- Local leadership and catalytic investments
- Economic balance with tourism, including consumer product development
- Third party recognition
- Strong visitor economic organization structure including sustainable funding model
- Major events that support the local goods and services

Source: *Regional Performance Over Time, Case Study: The Bend-Redmond, Ore., Metropolitan Statistical Area*, Milken Institute, February 2017

Figure 1 Milken Institute Best-Performing Cities ranking for Bend-Redmond MSA (2005-2016)





8.2 LEAVENWORTH, WASHINGTON

A story of how a complete commitment to a theme can become a major destination.

The town of Leavenworth, WA sits at the confluence of the Wenatchee River and Icicle Creek, under the peaks of the North Cascades Mountains, and is 135 miles from Seattle. Leavenworth had a long history as a wild frontier, attracting settlers with mining, timber, fruit growing and railroads. The depression during the 1930's, coupled with the relocation of rail lines, almost turned Leavenworth into a ghost town. Local leaders were not going to allow this to happen, so they created a compelling vision.

History

In the 1960's a small group of local residents inspired others with an idea to create a theme town fitting with the alpine setting; a Bavarian Village. LIFE (Leavenworth Improvement for Everyone) was launched to lead years of heroic volunteerism and financial sacrifice to create a destination far beyond what they ever imagined. The effort was not just not just a downtown renovation but rather a complete clean up the town including junk cars, appliances, and trash removal. Spring cleanup is still an important effort today.

Today

Leavenworth has become a "must see" northwest tourism destination to witness the scenery, partake in recreational opportunities, experience unique shopping, European flavor, special events, and festivals. The local population of just of two thousand regularly swells by 20-25,000, with dozens of tour buses and visitors heading to Main Street. Annual visitation tops 2,000,000, generating over \$200M in direct visitor spending.

Leavenworth design standards are now overseen by a Design Review Board and the City of Leavenworth to uphold building codes and sign ordinances that maintain the "old Bavarian" theme. Even McDonald's was not allowed to place they usual neon light sign, but rather a one-of-a-kind sign matching the theme.





CURRENT ECONOMIC SNAPSHOT

2016 Population	2,147
2000 – 2016 Population Change	+4.7%
Civilian Laborforce 16+ (% total pop.)	1,061(49.4%)
Median Household Income	\$45,184
Total Visitor Trips	2,000,000+

The Leavenworth success has been achieved with a strong commitment to the Bavarian theme, and linking it to events, outdoor recreation, culture, food, and shopping.

Key Actions/Factors for Success

- A clear and compelling vision
- Local investment in properties to support the vision and clean up the town
- Expert assistance for landscape and architectural design
- Strict rules to maintain the authenticity
- Economic diversification supporting downtown shopping and events

Source: www.leavenworth.org





9.0 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** or by email at **info@future-iq.com**

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**FUTURE OF TOURISM -
THE MAINE WOODS**
Part 1: Emerging Trends
November 2018



**FUTURE OF TOURISM -
THE MAINE WOODS**
Part 2: Potential Scenarios
December 2018

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PHOTO CREDITS: Photographs used in this report were generously provided by a number of sources, including Little Outdoor Giants (www.littleoutdoorgiants.com) and Ecophotography (www.ecophotography.com). Additional images were provided by Future iQ.



