

The Future of Tourism in the Maine Woods

EXECUTIVE SUMMARY



RURAL DESTINATION DEVELOPMENT – A \$5.6 BILLION OPPORTUNITY

In 2018, the Maine Woods Consortium contracted with Future IQ to facilitate tourism stakeholder dialogue and produce **two reports** to inform Rural Destination Development across the Maine Woods region.

The goal of the project is to provide insight to Maine Woods stakeholders working to position the region as a compelling destination for new visitors, businesses, and residents. The reports are:

Future of Tourism in the Maine Woods – Part 1: Emerging Trends.

This includes an analysis of key travel and tourism activity trends that will influence future visitation to the Maine Woods. The report addresses issues and trends including:

A rapidly growing global middle class – especially in Asia where **570% growth** is projected between 2009 and 2030.

Rapid embrace of technology for researching, booking, reviewing, navigating, sharing travel experiences and more.

Experience-based travel where recharging deep in nature and “one-off experiences you can’t get anywhere else” are among the top global tourist attractions.

Market trends across more than 15 outdoor recreation and experiential travel activities ranging from fishing and hunting to hiking, mountain-biking, skiing, shopping, and culinary tourism.

Future of Tourism in the Maine Woods – Part 2: Potential Scenarios.

This report summarizes a scenario exercise conducted by Future IQ with Maine Woods tourism stakeholders in 2018. It evaluates the potential economic and social impacts of alternative Destination Development strategies and identifies gaps and opportunities for the region. Topics and findings include:

Assessment of current economic contributions and potential economic and community benefits of successful destination development – pointing to opportunity to **more than double economic impact** from \$2.3 billion in 2017 to \$5.6 billion in 2030.

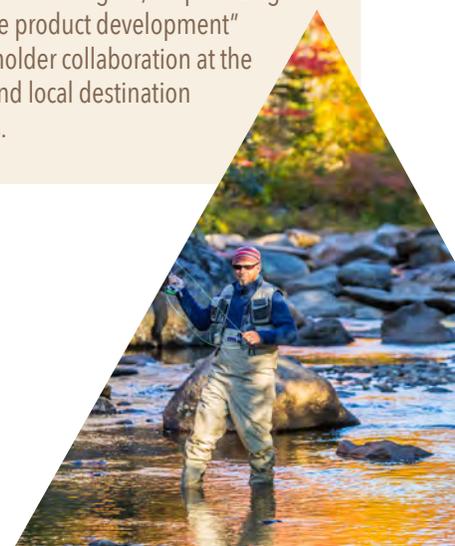
Analysis of destination development scenarios featuring multiple product development and marketing strategies, highlighting an approach based on “high-touch” experiences and new and high potential emerging markets.

Recommended strategies for high potential rural destination areas across the Maine Woods region, emphasizing “innovative product development” and stakeholder collaboration at the regional and local destination area levels.

These reports reflect Future IQ’s extensive experience and insights, and are intended to stimulate discussion about how best to build a sustainable tourism industry that optimizes local economic and community benefits.

→ [CLICK HERE to view the pdf of Part 1 online](#)

→ [CLICK HERE to view the pdf of Part 2 online](#)



SCENARIO ANALYSIS

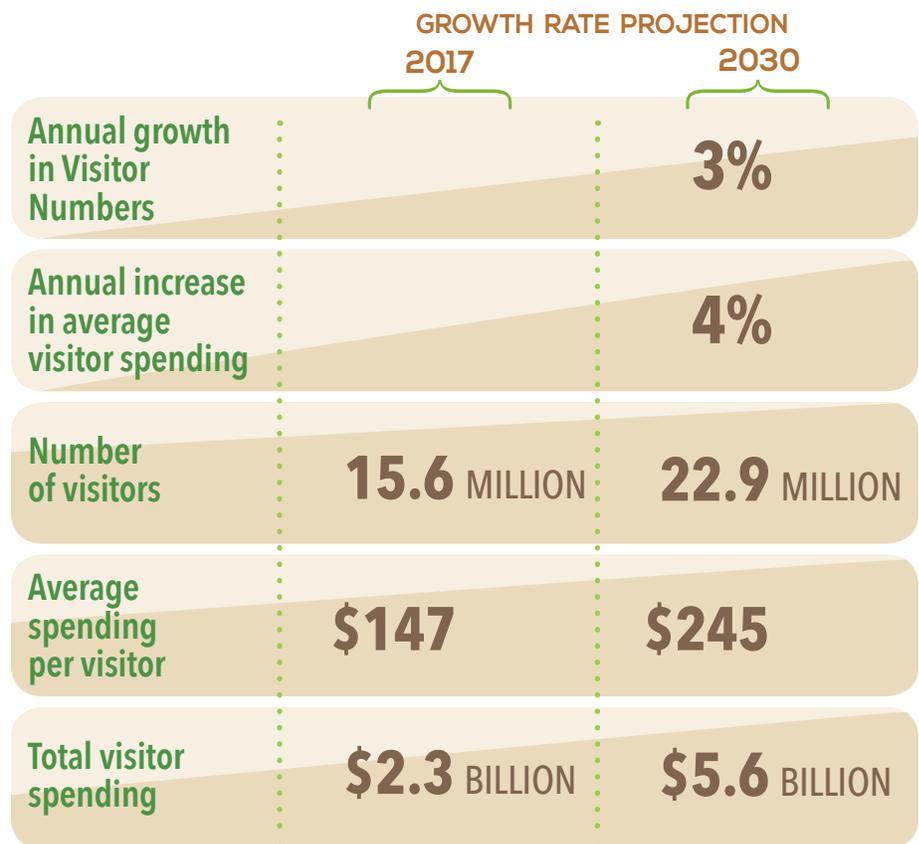
In May 2018, the Consortium convened a group of 75 tourism leaders for its fifth Maine Woods Destination Rally – engaging stakeholders from across the Maine Woods in a scenario development exercise focused on high potential Rural Destination Areas. The process explored multiple destination development scenarios based on a range of approaches across two key variables:

Visitor Markets – ranging from complete emphasis on traditional/existing markets to a strategy targeting emerging markets;

Product Development – ranging from rustic “do-it-yourself” experiences to “high-touch/high service” visitor experiences.

Participants agreed that a future scenario based on high potential emerging markets and high touch/high service experiences is the most promising approach to securing long-term economic benefits for rural Maine. The underlying consensus was that this approach could generate sufficient economic growth in the Maine Woods region to help revitalize rural communities and halt or even reverse their population decline.

PROJECTED ECONOMIC IMPACT – RURAL DESTINATION DEVELOPMENT IN THE MAINE WOODS REGION



Source: Future IQ – The Maine Woods: Tourism Economic and Social Impact Study, Nov. 2018
* Study region includes areas extending beyond the core Maine Woods counties.

Reaching tourism’s potential, however, will require effective local leadership and collaboration across the business, municipal and non-profit sectors. The challenge will be to create and market tourist products and experiences geared to 21st century traveler demographics and preferences.

STRATEGIC TAKEAWAYS

Growth Opportunity in Destination Development: The Maine Office of Tourism’s analysis of tourism data from the five official tourism regions that encompass the Maine Woods shows that in 2017 visitor spending totaled \$2.3 billion and supported more than 39,000 jobs, \$736 million in earnings and \$213 million in state tax revenue.*

Based on these data, Future IQ’s analysis indicates that strategic local and state-level investment in high-service product development and emerging markets can lead to significant expansion of tourism’s economic impact on rural communities. The chart above outlines Future IQ’s 2030 economic impact projections if Maine Woods destination development is successful. With 3% annual growth in visitors and 4% annual growth in spending per visitor, the region’s revenue from tourist spending would more than double within 13 years.



FUTURE IQ'S STRATEGIC RECOMMENDATIONS:

The Maine Woods region is at a pivotal time in the evolution of its tourism and outdoor recreation industries. There is an opportunity to get ahead of coming changes and shape tourism's short- and medium-term development in ways that complement the region's forest products industry. With expanding visitor markets driven by the growing global middle class, combined with the large Baby Boomer and millennial cohorts, the Maine Woods region has an opportunity to achieve unprecedented visitation and spending rates – if it prepares well.

The following strategic recommendations from the Future iQ team will help stakeholders plan for sustainable long-term tourism growth that delivers value to the Maine Woods region.

STRATEGY	RECOMMENDED ACTIONS
Innovative Product Development	<ul style="list-style-type: none">Work with High Potential Rural Destination Areas on unique place-based product developmentDevelop “packages” of highly curated travel experiencesEncourage new accommodation types and supply expansion
Marketing to Emerging Markets	<ul style="list-style-type: none">Develop an overarching Maine Woods marketing strategyCapture the Maine Woods' unique character and appeal
Local Leadership	<ul style="list-style-type: none">Bring elected officials, businesses, non-profits, and municipal leaders to the tableCommunicate tourism's economic benefits to the region's residents
Collaborative Regional Investment	<ul style="list-style-type: none">Convene private and public funders to coordinate tourism investments in the Maine Woods regionCreate attractions that will induce more coastal visitors to experience Maine Woods destinations
Sustainable Destination Management	<ul style="list-style-type: none">Incorporate the principles of sustainable destination developmentProtect the Maine Woods' working forests and environmental treasures

NEXT STEPS:

The Maine Woods Consortium is committed to working with the Maine Office of Tourism and community stakeholders to position high potential areas as amenity-rich destinations not only for tourists, but also for new residents and businesses. The Consortium will continue its networking and policy development, and implement a new Community Destination Academy (CDA) program to build organizing capacity in high potential Rural Destination Areas.

Piloted in the Moosehead Lake region in 2018, the CDA program aligns closely with Future iQ's recommendations for the region – with a focus on building multi-sector teams in Rural Destination Areas and providing them with skills training and financial and technical support to implement local product development and/or marketing projects as a starting point for long-term destination development. To learn more about the Community Destination Academy, visit:

www.mainewoodconsortium.org/2018/05/07/community-destination-academy



MAINE WOODS CONSORTIUM

The Maine Woods Consortium is a network of non-profits, businesses, and state agencies working to advance rural economic development in the Maine Woods through promotion of high potential Rural Destination Areas where recreational and cultural amenities, hospitality services, transportation infrastructure, dynamic events, and vibrant downtowns attract new visitors, businesses and residents.

Since 2010, the Consortium has brought a new focus to tourism destination development as a strategic priority for the Maine Woods region – which it defines as including most or all of seven counties, from Oxford in the west across the northern “crown of Maine” to Washington county. By coordinating the work of multiple stakeholders, directing services to local tourism businesses, and sponsoring regional network gatherings, the Consortium has advanced a rural destination development strategy that looks beyond marketing to invest in tourism products and services, host community amenities, and visitor experiences capitalizing on Rural Maine’s quality of place and its extensive natural and recreational resources.

The Consortium has identified nine Maine Woods areas where a combination of natural, recreational and cultural assets, hospitality businesses, and local commitment point to real opportunity as compelling tourism and recreation destinations. These high potential Rural Destination Areas are circled on the map.

The readiness of different areas to pursue destination development varies widely. However, strategic targeting of product development and marketing resources in these destination areas promises significant long-term benefits to economy, community vitality, and quality of life across the Maine Woods.



ABOUT FUTURE IQ:

Future iQ is an international consulting firm that 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. In 2016-17, Future iQ produced a Strategic Action Plan for leaders in Maine’s Moosehead Lake region, and for the past decade Future iQ has played a key role in development of Oregon’s travel and tourism industry. To learn more about Future iQ visit www.future-iq.com

MORE INFORMATION:

To download the reports or learn more about the work of the Maine Woods Consortium please visit: www.mainewoodconsortium.org



All photos by Jerry Monkman/ Ecophotography except p. 2 dining out by Dinis Tolipov and p.3 on the deck by Northern Outdoors.

