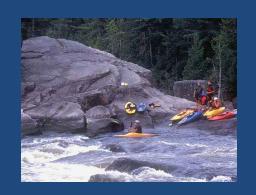
Spreading Prosperity to All of Maine: Protected Lands and Sustainable Tourism



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Tourism as a Lead Sector in Rural Revitalization

Four Lead Sector Qualities

- Critical Mass: Major Source of Income and Jobs
 - Rim Counties: 9% of GSP & 11% of jobs
 - Caveat: deficient job quality
- Major Source of Export Revenues
 - Tourism as a unique export
- Major Impact on Community Vitality
 - Don't ignore potential downside
- Growth Potential
 - Supply capacity in sync with traveler preferences and demands
- Note: Other promising rural lead sectors health care, renewable energy, farm-to-table agriculture

Imperative: Quality-Centered Tourism Strategy

Prime Target Market: Experiential Tourists

"...travelers who seek out destinations offering 'the whole package' of outdoor recreation experiences combined with high quality hospitality services, shopping opportunities and cultural and heritage activities. In other words, quality experiences in quality places." (Vail 2010: 3)

- Diverse demographics: Boomers, DINKs, WHOPs etc.
- Downeast/Acadia overnight leisure profile: av. \$118k, 83% ≥ BA, 26% NY

Developing Quality Products

- e.g. Maine Woods Consortium: Tourism Training Initiative, MW Discovery,
 MW Quality Label
- Caveat: "quality" ≠ Five Star

Developing Quality Destinations

- What role for conservation and green infrastructure?
- Branding & Marketing Quality (of course)

Reality #1

Secular Stagnation or Decline in Several "Traditional" Outdoor Recreation Activities & Destinations

- Camping
- Hunting & Fishing
- Alpine Skiing
- Snowmobiling
- Acadia, Allagash & Baxter Visits





(minor qualification: recession, slow recovery & "staycations")

Reality #2 Evidence of a Maine Woods Quality Problem

<u>Percentage of Overnight Visitors Who Will "Definitely" or "Probably" Recommend Maine Destinations to Others</u>

Four coastal regions 52% to 70%

Lakes and Mountains 42

Highlands 42

Kennebec/Moose River 38

Aroostook 28

Source: Davidson Peterson Associates. Maine Overnight Visitor Tracking Survey - 2008: 107.

Reality #3 Evidence of a General Maine Tourism Quality Problem

<u>Proportion of Respondents Who View Maine Favorably</u> <u>Compared to Alternative New England Destinations</u>

	2008 Maine	Past Maine	Prospective
	Visitors	Visitors	<u>Visitors</u>
Customer service qua	lity 68%	41%	23%
Value for the money	62	32	22
Variety of activities	64	41	22
Overall experience qu	ality 80	45	23

Source: Davidson Peterson Associates. 2009. Visitor Prospect Survey: 125.

Reality #4 How Maine Woods Visitors Spend

(Overnight "Leisure Visitor" Parties – 2010)

Lodging \$170 27% of total

Food 150 23%

Retail expenditure 170 27%

Transportation 100 16%

Recreation activities 51 8%

Total \$641

Source: Davidson Peterson Associates, Maine Office of Tourism – Maine Woods Presentation. 2012:20.

Washington County Tourism Strategy: What Role for Conservation and Green Infrastructure?

Perceived Economic Growth Potential

- 1. Experiential tourism
- 2. Wildlife watching
- 3. Canoeing & kayaking
- 4. Arts, culture & heritage
- 5 tie. Family vacations (seasonal homes, rentals)
- <u>5 tie. Conferences & group retreats</u>
 - 7. Boating & sailing
- 8. Fishing (hunting, trapping)
- 9 tie. ATVing
- 9 tie. Hiking & backpacking
- 11. XC skiing & snowshoeing
- 12. Snowmobiling

Source: Vail. 2010. Amenity Investment and Tourist Destination Development. MECEP: 63

Coastal Washington County: Perceived Destination Weaknesses

Overall Ranking (av. score)	% indicating "Major Weakness"
1. Distance, travel time, roads	56%
2. Weak branding and promotion of the	e region 44
3. Lack of destination resort/conference	e center 38
4. Condition of town & village centers	33
5 tie. Quality & variety of dining and loo	dging 20
5 tie. Shopping opportunities	14
7 tie. Quality of customer service	
9. Limited arts, culture & heritage attra	ctions 7
11. Quality & variety of outdoor recreati	on services 0

Source: Vail. 2010: 62

Coastal Washington County Destination Investment Priorities

% Who Rate Current Investments

Priority Ranking	Excellent/Good	Poor
1. Transport infrastructure within re	gion 7%	50%
2. Develop arts, culture, heritage att	ractions 38	15
3. Enhance town & village buildings	8	23
4. Enhance town & village roads & p	arking 15	42
6. Improve customer service - training	ng 25	17

Source: Vail. 2010: 64



- Keep up the good work! (target funds strategically)
- Foster the money-making side of outdoor recreation
 - Guides, outfitters, etc.
- Blend "soft" outdoor adventure opportunities into "the whole experiential package"
- Continue a branding/marketing focus on unique natural assets and nature-based experiences