Maine Conservation Recreation Forum

Maine's Outdoor Recreation Economy: Past, Present and Future

Presented by:
Maine Office of Tourism

MANE'S Become the penting four-session destination in New England Company of the Company of th

Become the premier four-season destination in New England

RESEARCH DRIVEN

Demographic – Visitors & Prospects

Psychographic - Prospects

Visitor Research

The specific objectives of the program are:

- to identify Maine's share of the travel market;
- to quantify the number of visitors who come to Maine;
- to estimate the amount of spending devoted to tourism in Maine;
- to profile the Maine traveler including where they come from, who they travel with, where they go in the state and what they do.

Maine Office of Tourism Maine Woods Presentation

Prepared by



April 2012

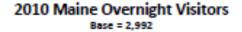
Full report available at MOTPartners.com

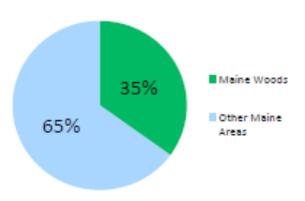
Overnight Leisure Visitor Demographics

 About one-third of Maine overnight visitors had a primary destination in the Maine Woods regions of Maine.

Maine Woods visitors skew younger and tend to have a lower income level than coastal

visitors.





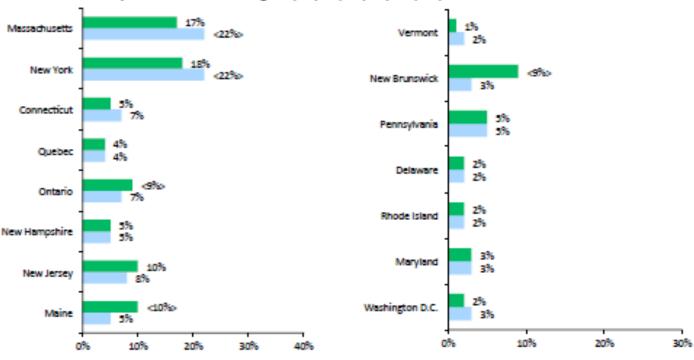
2010				
		Other (Base=1,938)		
Mean Age	42.3	<45.2>		
< 35	<36%>	29%		
35 - 44	20%	1996		
45 - 54	20%	22%		
55+	23%	<30%>		
Mean Income	\$100,720	<\$106,760>		
< \$50,000	<17%>	12%		
\$50,000 - \$99,000	38%	35%		
\$100,000+	33%	<37%>		
Female	44%	47%		
College Degree or Higher	77%	78%		
Married	53%	57%		
Employed Full Time	66%	64%		
Length of Stay	3.7	3.6		



Overnight Leisure Visitor Residence:

 As with the rest of the state, many visitors to the Maine Woods hail from Massachusetts and New York, although Maine Woods visitors are more likely to call New Brunswick, Ontario, or Maine home.



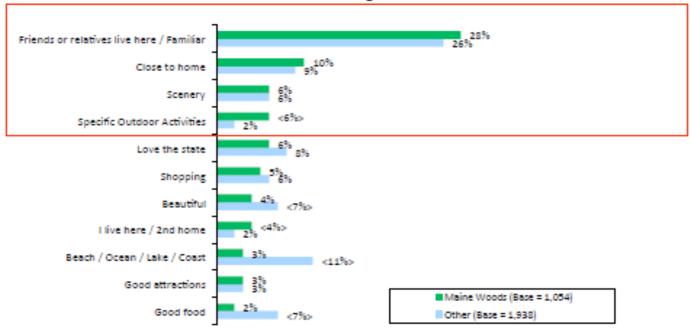




Reasons for Selecting Maine

Maine Woods visitors are more likely than their counterparts to cite a specific outdoor
activity or that they own a 2nd home/timeshare as a reason for selecting Maine. They
are not likely to focus on the state's beauty, presence of the ocean, or good food.

Reasons for Selecting Maine Overnight Visitors





Overnight & Day Visitor Spending

- Overall, when comparing Maine Woods visitors to those seeking other areas of Maine, per trip spending is quite similar.
- However, Maine Woods overnight visitors tend to spend more on recreation in particular, not surprising given the focus of their trips on activities.

2010 Overnight Travel Spending				
	Maine Woods	Other		
Net Spending	\$641	\$678		
Spending by Category:				
Lodging*	\$170	\$220		
Transportation*	\$100	\$75		
Food*	\$150	\$195		
Retail Goods**	\$170	\$155		
Recreation**	\$51 ٨	\$33		

	Maine Woods	Other		
Net Spending	\$174	\$177		
Spending by Category:				
Lodging*	NA	NA		
Transportation*	\$40	\$30		
Food*	\$40	\$50		
Retail Goods**	\$80	\$84		
Recreation**	\$14	\$14		

Regional Q33 & Day Q14. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of 20 the following categories below.



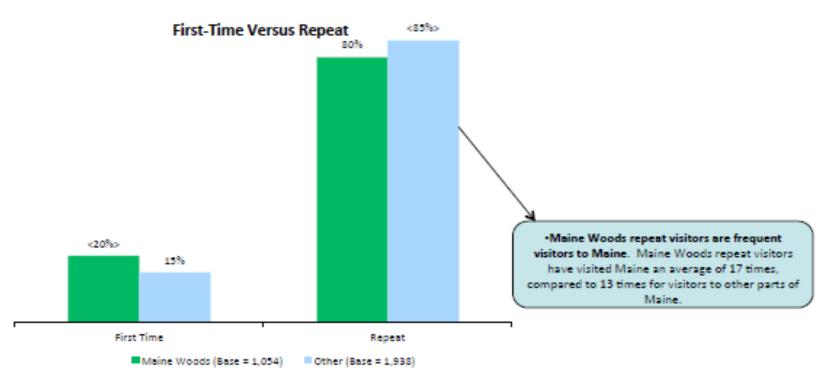


^{*}Medians include zero without outliers

^{**} Means including zero without outliers

Repeat versus First Time Visitors

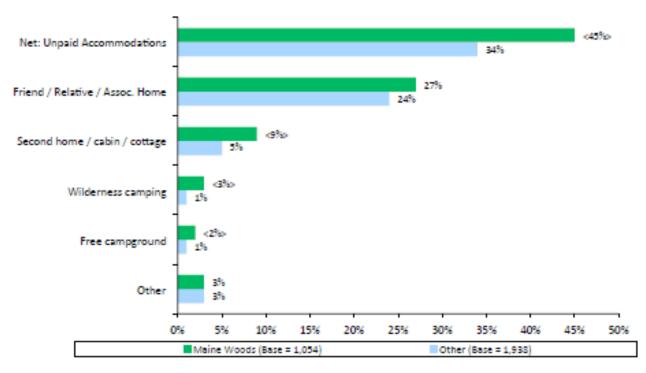
 One-in-five Maine Woods visitors are first time visitors to the state, demonstrating that the woods tend to be a greater draw for new visitors than the coastline, which shows stronger repeat visitation.





Unpaid Accommodations While in Maine

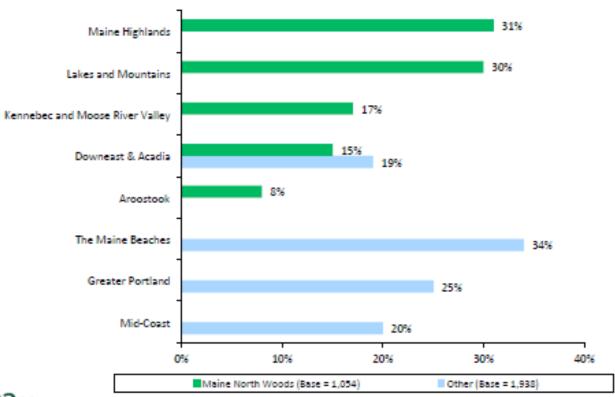
 Rather, Maine Woods visitors are more likely to stay in a second home/cabin/cottage/ condo that they own, or spend time camping while visiting Maine.





Primary Region of Visit to Maine – Maine Woods *Visitors*

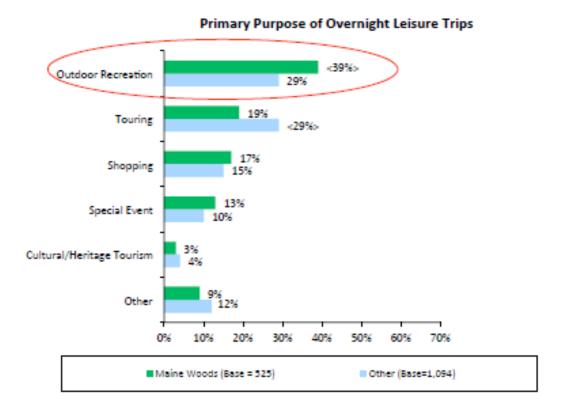
 Maine Woods visitors are most likely to visit the Maine Highlands or Lakes and Mountains region as the primary destination of their trip.





Primary Purpose of Overnight Leisure Trips

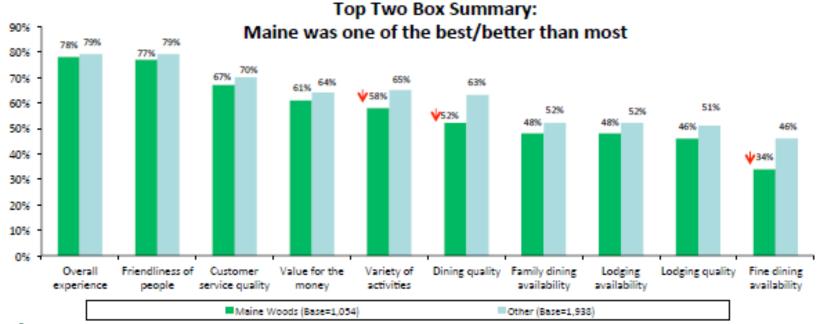
Those visiting the Maine Woods are more likely to be visiting Maine to take advantage
of outdoor recreation opportunities. Those visiting other regions are more likely to
consider the primary reason for their trip to be a touring vacation.





Comparison of Maine to Other Destinations

- Significant differences are particularly evident in visitors' perceptions of Maine's dining, with Maine Woods visitors rating Maine lower for both quality and availability of fine dining.
- Additionally, Maine Woods visitors are less likely to rank Maine highly for variety of activities, despite already high engagement of these travelers, they may be seeking even more to do.





Summary

- About one out of every three Maine visitors primary destination on their trip to Maine is within the Maine Woods regions of Maine. These visitors tend to be younger than visitors to other parts of Maine, with slightly lower income.
- They tend to be more frequent travelers, in particular they take more VFR and business trips. The VFR travel is noteworthy, as these travelers tend to be engaged with friends and family on their trips to Maine.
- They also are engaged in specific outdoor activities to a greater degree than their coastal counterparts. Their trips seem to be about people and activities, and the Maine Woods provides the right atmosphere to enjoy time with their friends, and engaging in the activities they love.
- Maine Woods visitors tend to give the state lower ratings for it dining, as well as lower ratings for its breadth of activities despite being a more activity-engaged group.
- Overall spending is similar across both groups of travelers, with Maine Woods visitors spending a bit less on lodging and food, but more on retail shopping, transportation, and recreation.
- Importantly, Maine Woods visitors are more likely to be first time visitors to Maine than coastal
 visitors. This suggests that the Maine Woods can be an avenue to introduce younger visitors to the
 state, feeding the funnel of future visitation. In fact, repeat visitors to the Maine Woods are among
 Maine's most frequent and loyal visitors.



Demographic Changes

- Aging society
- Having children later in life
- Families with fewer children
- Wider range of household types
- Greater ethnic diversity
- Rural depopulation

Travel Trends

- Strong spend by the younger generation
 - Gen Y and X are spending on luxury but want good value.
- Value continues to be king
 - even the affluent are focused on good value.
- Competing globally
 - 68% of Americans plan to travel outside the US
- "Diverse aware"
 - duel pronged strategy for over 50 and under 50.
 - Cultural differences

Travel Trends

- Technology and Travel
 - Easy to log on while traveling
 - Mobil devices/Small Screen smartphones, iPads
 - Social networks become more important to trip planning
 - People get advice from friends, not strangers
 - Information overload on the Web
 - Difficult to sift content to find authentic suggestions and advice
 - Travel agencies and one-stop shops for tailored vacations

Travel Trends

- Caution Curation Contentment Convenience
 - Caution Consumers are vigilant. Want vacation that is risk free.
 - Curation Circles of intimacy manage information and relationships.
 - Contentment Spontaneity and fun snatched away. Wellbeing and meaning will define context of happiness.
 - Convenience Empowered consumer wants more choices

Outdoor Trends

- Seek meaningful outdoor experiences
- Diverse demographic
- Outdoor recreation is an essential part of daily life
- Strengthens local communities
- Leaders across the country realize economic, social and health benefits
 - No longer a nice to have, now a must have
- Spend more occurs in two forms
 - trips & travel
 - gear & vehicles

Outdoor Recreation Economy Report by the Outdoor Industry Association

Outdoor Trends

- Youth participation declining, ages 6 to 12
 - 2011-63%; 2006-78%
- Outdoor Participation Total
 - 2011-49.4%; 2006-49.1%
- Most popular activities among young people and similarly adults
 - Running
 - Biking,
 - Camping
 - Fishing
 - Hiking

Outdoor Trends

Activities showing significant 3 year growth

- Telemarking 46%
- Snowshoeing 41%
- Recreational kayaking 32%
- Triathlon 28%
- Whitewater kayaking 24%
- Bow hunting 24%
- Adventure racing 16%

Outdoor Participation Topline Report 2012 – Outdoor Foundation



Types of Tourism

Ecotourism - "responsible travel to natural areas that conserves the environment and improves the well-being of local people" *TIES*, 1990

Cultural heritage tourism - "traveling to experience the places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural and natural resources." *National Trust for Historic Preservation*

Sustainable tourism - "maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them." *World Tourism Organization, 2004*



Types of Tourism

Responsible tourism -

- minimizes negative social, economic and environmental impacts
- generates greater economic benefits for local people and enhances the well-being of host communities
- improves working conditions and access to the industry
- involves local people in decisions that affect their lives and life chances
- makes positive contributions to the conservation of natural and cultural heritage embracing diversity
- provides more enjoyable experiences for tourists through more meaninful connections with local people, and a greater understanding of local cultural, social and environmental issues
- provides access for physically challenged people
- is culturally sensitive, encourages respect between tourists and hosts, and builds local pride and confidence



Types of Tourism

Voluntourism - form of travel where one volunteers on projects which give back to the community.

Nature-based tourism - Leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of outdoor activities. Bird watching, hiking, fishing, and beachcombing are all examples of nature-based tourism.

Geotourism - similar to sustainable tourism and is a definition brought about by National Geographic Traveller...the concept is the same but they focus on the 'sense of place' in an area rather than the industry's efforts.



General Principles

- Connection to community
- Locally products
- Historic preservation
- Sustainable use of resources
- Telling the story
- Authenticity

STRATEGIES STRATEGIES

- Rejuvenate/refresh the Maine brand to make it relevant and contemporary.
- Convert aspiration to visitation among first time visitors.
- · Use research and date analytics to focus on those

markets that have the highest propensity to deliver new

visitors staying in paid accommodations.

Employ a clear two-pronged approach:
 ACQUISITION – entice first time visitors
 RETENTION – give past visitors a reason to return

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 RETENTION give past visitors a reason to return

SPECIAL INTEREST

People Pursue their Passions

- Special interest activities will draw visitors from a wider geographic area giving Maine increased exposure beyond New England/Canada
- People will find time and money to pursue the activities about which they are passionate.

Special Interest Segments To be Targeted Through Paid Media

- Hiking/Climbing
- · Cycling
- Paddling
- · Wildlife Watching
- · Outdoor Adventure
- Culinary
- · Cultural Tourism
- Winter Sports

^{*}Special interests chosen based on those with the greatest amount of overnight visitation

A state of being more valuable than the "things" – activities, vistas, sites, food, etc. Maine needs to become an antidote for something missing in consumers' lives

A state of being more valuable than the "things" – activities, vistas, sites, food, etc.

Maine needs to become an antidote for something missing in consumers' lives

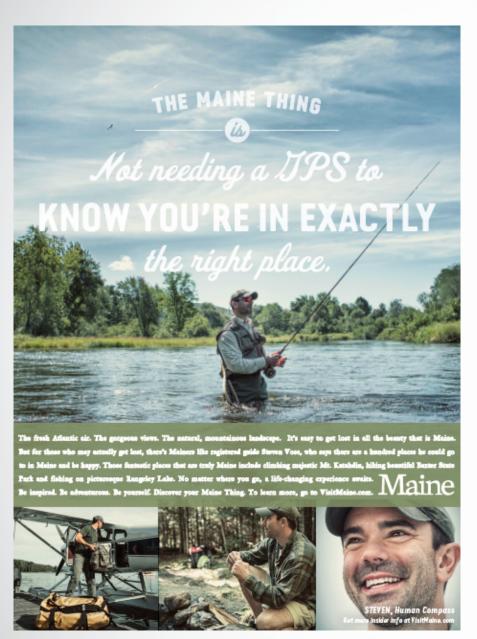
- What is the Maine attitude?
- What does the Maine experience feel like?
- What personal values (core human values) burn more brightly in Maine and in a Maine vacation experience?
- What is the authentic sense of place that Maine delivers?
- Where does the Maine brand intersect with or reflect vacationer's sense of self/their personal identities?

recreation clear-mindedness na intimacyreverence We need to create an emotional connection between the Maine brand and potential visitors, that operates on a personal level, and drives visitation—especially among first-timers. WHERE YOU
CAN FOLLOW
YOUR INNER
COMPASS AND
BE COMPLETELY
YOURSELF

DIFFERENTIATED
RRAND RENEFIT



THE REAL THING. FROM REAL PEOPLE. GIVING REAL ADVICE.

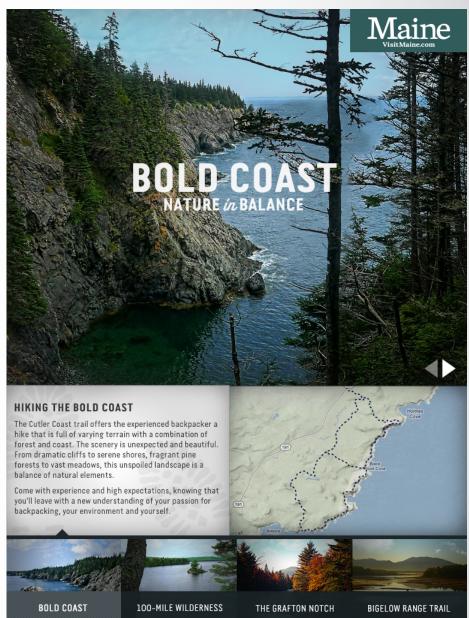


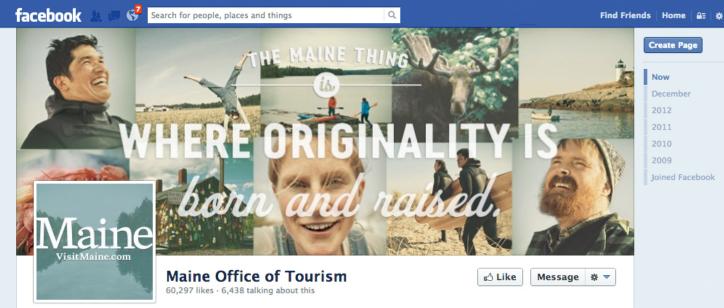
















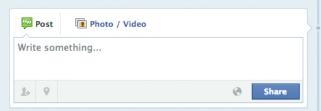


Free Travel Guide



3▼

Highlights *



Thanks for visiting the official Facebook page for the

Maine Office of Tourism. It's winter in Maine. The season for skiing and snowboarding, skating,



Travel/Leisure

About

Enjoy playing in the snow this weekend, but heed the warning from the Maine Department of Inland Fisheries and Wildlife that many lakes, ponds and rivers still have open water and are not safe to be on. Talk to locals to find out where to enjoy the snow safely.

http://bangordailynews.com/2013/01/02/outdoors/theres-no-safe-ice-on-maine-lakes-rivers-and-ponds-officials-say/







ALL IXLV. VisitMaine.com







CHOOSE a SEASON

National Trust for Historic Preserva-

tion, recognized for their authentic...





explore on foot for the day, more...



That's the second largest...





SPRING ★ SUMMER ₩ FALL B WINTER



PRIVACY POLICY SITE ACCESSIBILITY SITE MAP CONTACTUS

MAINE STORIES WEDDING RESOURCES UNIVERSITIES & COLLEGES LIBRARY DIRECTORIES SUMMER CAMPS

TOURISM PARTNERS TOURISM WORKS FOR ME GROUP TOURS MAINE IS FOR MEETINGS ECONOMIC DEVELOPMENT

MADE IN MAINE DOING BUSINESS











Enhance user experience & content Improve design & functionality Apply new technology

Enhance user experience & content

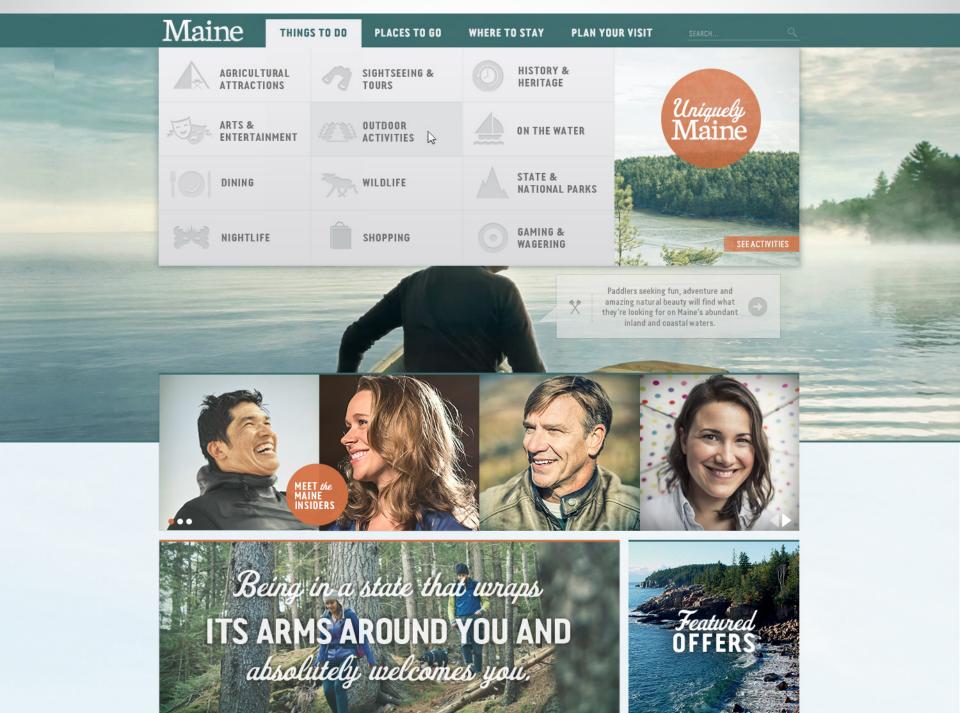
- Simplify navigation
- Improve content {more experiential and emotive}
- Multiple paths to content
- Alignment with key vacation planning stages
- Content based on user preference
- Increased exposure to partners outside of listings
- Better mobile experience

Improve design and functionality

- Editorial / magazine layout style cues
- Contemporary design elements
- Display content in 'snack-able' structure
- Evolve trip planner functionality
- Imagery and typography to help tell the story
- Adaptive design for multi-screen and multi-device consumption

Apply new technologies

New content management system
Improved search integration
Advanced mapping functionality
New development techniques









CHOOSE a SEASON

Filter your site experience by the season >



SPRING





FEATURED CONTENT





Majestic mountain vistas, abundant snowfall, impeccably groomed trails, tree-studded glades, powerful snowmaking, short lines and high-speed lifts - that's Maine skiing at its legendary best, and why skiers and...

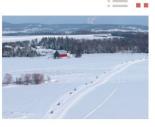
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DOG SLEDDING

Imagine bounding across the frozen expanse of a remote lake surrounded by mountain peaks clad in evergreens, holding tight to the reins of your dog team as they drive your sled forward through the deep snow..

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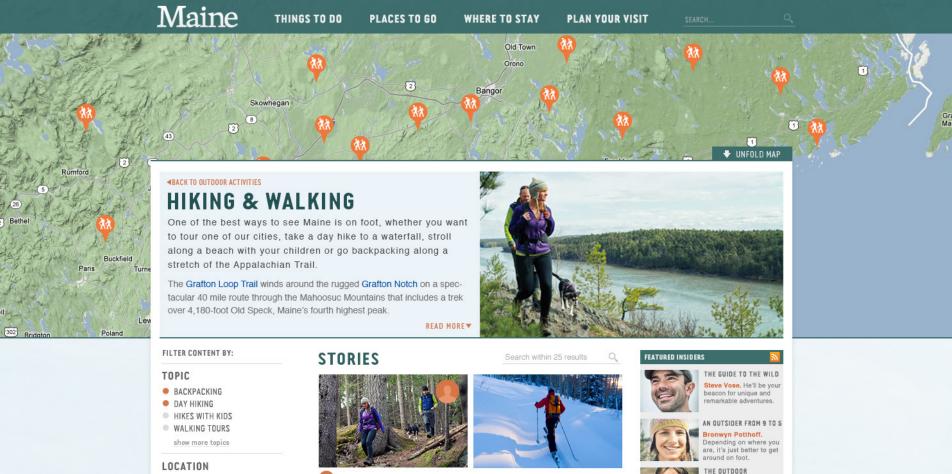
SNOWMOBILING

One of the best ways to enjoy Maine's stunning winter landscape is to climb aboard a snowmobile, rev up the engine and ride to your hearts content. Our state is the premier snowmobiling destination in the ...

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HOME DISCOVER MAINE MEDIA ROOM



- AROOSTOOK COUNTY
- DOWNEAST & ACADIA
- GREATER PORTLAND & CASCO BAY
- KENNEBEC & MOOSE RIVER VALLEYS
- MAINE'S LAKES & MOUNTAINS
- MIDCOAST
- THE MAINE BEACHES
- THE MAINE HIGHLANDS: BANGOR, KATAHDIN & MOOSEHEAD LAKE

SEASON







> WINTER

A HIKER'S TABLOID

SPOON was a 100 Mile Wilderness thru-hiker. Like many of his (or her) Appalachian Trail (AT) and 100 Mile Wilderness thru-hiking..

30 LIKES





WINTER FUN ON PUBLIC TRAILS

From the coast to the foothills and mountains to the North Woods, Maine's natural beauty and abundant wildlife beckons. For outdoor enthusiasts desiring to take to the woods and explore on foot for the day more than ..

17 LIKES

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YOU MIGHT LIKE

Search within 26 results Q



ADVENTURER Barry Tripp. An adventurer who typifies the Maine outdoor sports enthusiast



TRIP IDEAS



VILES ARBORETUM

the Arboretum's two dozen plant and tree collections, provide endless opportunity.



WILDLIFE PHOTOGRAPHY

Immerse yourself in a uniquely Maine photography workshop.











AN OUTSIDER FROM 9 TO 5. BRONWYN POTTOFF.

With a diverse landscape, Maine is a playground of outdoor activities. As an outdoor enthusiast, Bronwyn spends her waking hours exploring Maine's natural terrain. She hikes the land and navigates the water, allowing it to guide her next voyage. According to Bronwyn, depending on where you are, it's just better to get around on foot, bike, or kayak.

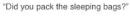
MORE STORIES BY BRONWYN

Nightlife in Maine htlife In Maine









multi-day paddling trip down the coast.











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A TRULY DOWN-TO-EARTH FARMER Seren Huus, A huge supporter of the farmto-table movement.



ADVENTURER Barry Tripp. An adventurer who typifies the Maine outdoor sports enthusiast.

& VIEW ALL INSIDERS

But tonight there were no kayaks or cars. Our bike panniers were freighted for a short, six-mile pedal to the beach in anticipation of watching the "Super Moon" rise over the Atlantic. This "perigee" was supposed to be 14% bigger and 30% brighter than other full in 2012, so it wouldn't matter if there were skyscrapers and apartment buildings obstructing our view. On the beach though, the slight haze off the water and occasional gull are our only distractions. No telephone wires, cell phone towers, hum of traffic, or some competing light.

trip to the Bigelows or preparing to load the front hatch of kayak for a

We parked our bikes at Beach Avenue - a small parking lot along Mile Stretch Road in Biddeford Pool. Aptly named, Biddeford Pool is a large tidal pool at the mouth of the Saco River. During the summertime and migratory seasons, birders flock to the pool and surrounding marshes to study the herons, swallows, hawks, eagles and other feathered beasties who inhabit the abundant tall grasses along the beaches and river. The water is usually bustling with activity: lobster men and women hauling in traps, clam diggers raking for meaty bi-valves, and kayakers paddling around Wood Island during high tide. At low tide, the pool empties, and dime-sized hermit crabs scuttle around in search for pockets of water and heaps of seaweed, under which they can hide.

We set-up on the far side of Fortune's Rock beach, careful to pick a spot beyond the rocky ledges that succumb to the surf during high tide. This is my favorite place to readespecially during the winter, curled up on the beach in a sleeping bag like a cocooned caterpillar. Fortune's Rocks and the surrounding stretch of beach offers a rare mix of tubular waves sought after by surfers and



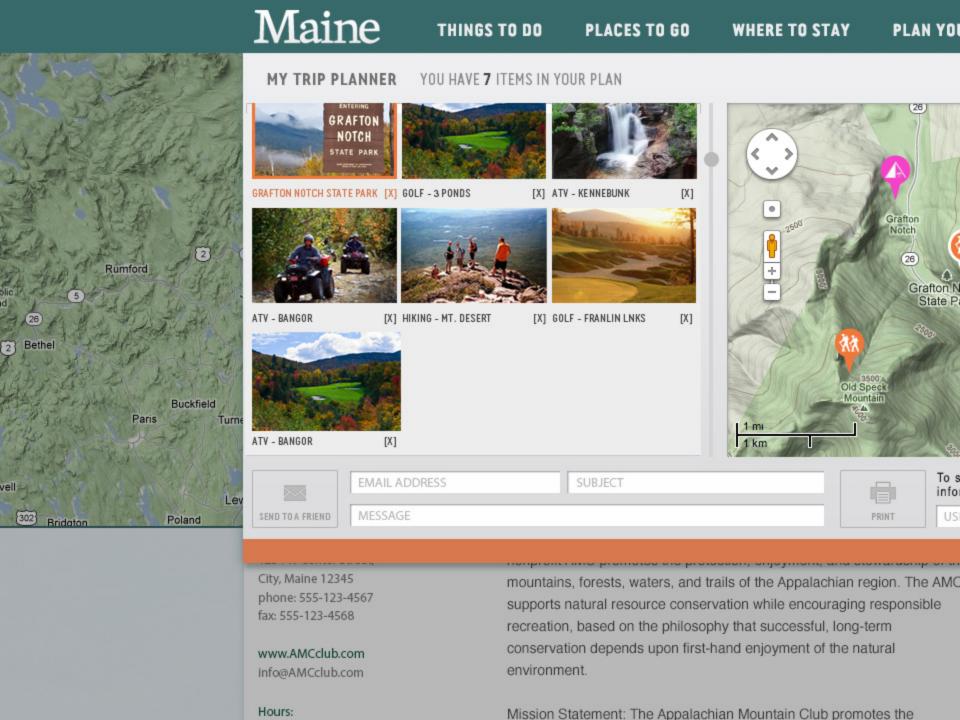
Editor's Notes:

Biddeford Pool is a large tidal pool where the Saco River meets the sea. It hosts lobstermen and vacationers alike, and is an excellent place to explore Maine's salt marshes. Many species of birds and wildlife call these lush, muddy banks their home, and the East Point Sanctuary is considered to be one of the premier birding spots in the Northeast.

Wood Island is the site of Maine's haunted Wood Island Lighthouse. Known for its characteristic alternating green and white flashes, this lighthouse has been a Maine landmark since the early 1800s. Reachable only by sea, tours are available with a reservation. Otherwise, the island and lighthouse are not open to the public.

Fortune's Rock Beach is only about 20 miles from downtown Portland, Maine's largest city. This sandy, 2-mile stretch of beach is a popular place to lounge or enjoy wave sports. You can go surfing, body surfing, skim boarding and surf kayaking.

Portland has a contemporary urban scene with great restaurants, brew pubs, unique shops



THE MAINE THING



Where original people perfectly complement the beauty of this place. Explore and discover what the Maine Thing is all about. So be inspired. Be adventurous. Be yourself. Discover your Maine Thing.

Carolann Ouellette
Carolann.Ouellette@maine.gov