



Revitalizing the Maine Woods Tourist Destination

Critical Investments for a “Big Push”

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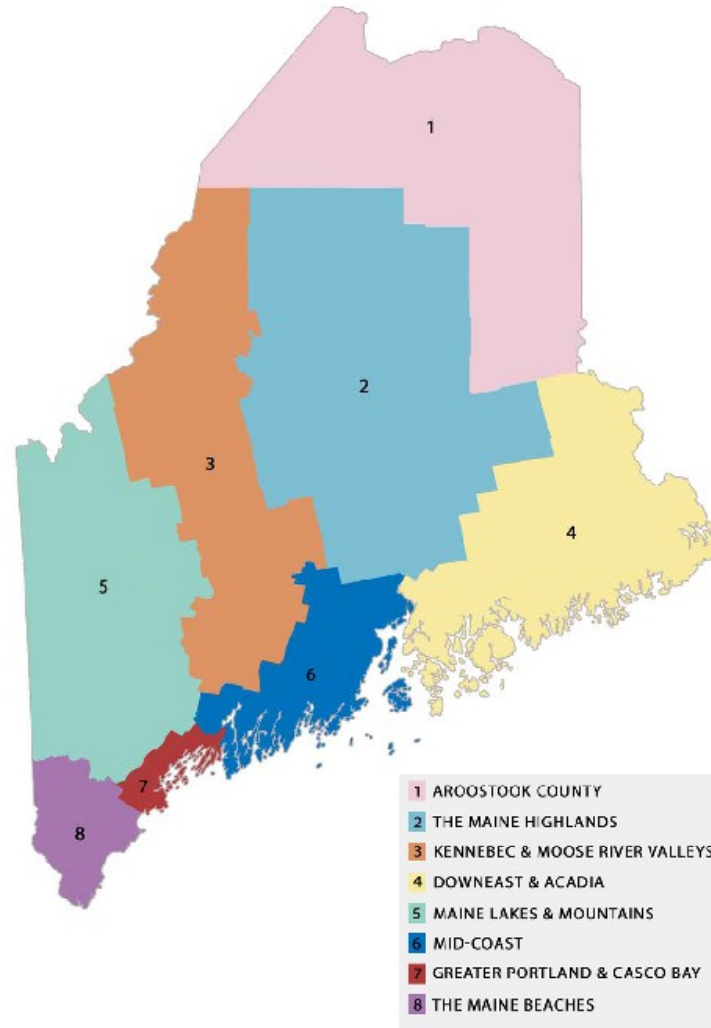
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Maine Tourism Regions



Chronic Social & Economic Distress

- **Comparative Unemployment Rates: September 2007**

- Dover-Foxcroft Labor Market Area 6.9%
- Portland-South Portland LMA 3.4%

- **Comparative Per Capita Income (2003)**

- Cumberland County \$35,500
- Piscataquis County 23,000 65% of Cumberland
- Somerset County 23,000 “ “

- **Comparative Poverty Rates (2003)**

- Cumberland County 8.0%
- Piscataquis County 14.6%
- Somerset County 15.3%

- **Comparative Population Dynamics**

- Net Migration (1990-2005)
- Coastal Counties +47,061
- Rim Counties - 6,237

Tourism as a Lead Sector in Rim County Revitalization

- **Current Economic Importance**
 - Direct Employment: ca. 10% of FTE jobs
 - Direct Income: ca. 8% of rim's GSP
 - Regional Multiplier Effects: ca. 25-50%
- **“Export” Revenue Source**
- **Untapped Growth Potential**
 - Demand Side: Destination Development & Branding
 - Supply Side: Underutilized Capacity

Maine Woods Tourism: Vulnerabilities and Challenges

- **Signs of Stagnation & Decline in Traditional Outdoor Recreation**
- **Changing Traveler Demographics and Preferences**
 - Boomer explosion & rise of the “experiential tourist”
- **Determined & Sophisticated Competitors**
 - Nearby (White Mountains) & far away (Rockies)
 - Reality: World-class ambitions – modest assets
- **Rising Fuel Costs**
 - A “drive to” destination: 92% of arrivals
 - Comparative remoteness, scattered attractions

Stagnation & Decline in Traditional Outdoor Recreation

- **Tourist Visits to Key Destinations**

- Allagash Wilderness Waterway > 50% decline in past 5 years
- Baxter State Park > 25% decline in past 5 years
- Acadia National Park > 20% decline in past 5 years

- **Visits to Lily Bay State Park**

- Day use: 3 year average
2000-2002 14,330/yr.
2004-2006 11,710/yr. (18% decline)
2007 through September: 8% decline
- Camper nights: 3 yr. av.
2000-2002 23,080/yr.
2004-2006 22,820/yr. (1% decline)
2007 through Sept.: 4.4% decline

- **Hunting and Fishing Licenses**

- Hunting: Grand total, 3 yr. av.
1994-1996 219,530
2004-2006 213,320 (3% decline)
- Fishing: Grand total, 3 yr. av.
1994-1996 284,290
2004-2006 276,140 (3% decline)

- **Whitewater Rafting**

- 1999 through 2006: 18% decline in rafting numbers (from 91,000 to 68,000)
- 17% decline in real revenues (netting out inflation effects)

Initiatives Galore:

A Public, Private, NGO Sampler

- **State**

- Maine Nature Tourism Initiative: 3 pilot regions
- UM Center for Tourism Research and Outreach
- Maine Downtown Center: *Maine Street Maine*
- DEP *Environmental Leader* lodging certification

- **Private**

- Resort Upgrades: Millinocket Lake, The Forks, Saddleback
- New Resorts: Plum Creek at Moosehead Lake
- Maine Fiber Arts Trail, Maine Crafts Alliance etc.

- **NGO**

- Maine Winter Sports Centers
- AMC “100 Mile Wilderness” Maine Woods Initiative
- Mahoosucs to Moosehead Huts and Trails
- Maine Mountain Heritage Network (now Maine Woods Consortium)

Weakness: Small & Scattered

“The nature-based and cultural and historic offerings in the [Nature Tourism Initiative] pilot regions do not function as any sort of thematic group and are largely just a disconnected collection of sites.”

Fermata Associates, *Strategic Plan for....the Maine Nature Tourism Initiative (9.2005)*

Components of a “Big Push”

- ***A Great Maine Woods Recreation Area***
 - “Emerald Necklace”: 2m. acres of protected lands
 - Image: Minnesota’s Boundary Waters
 - Major Upgrade of “Green Infrastructures”
 - Integrate Coastal and Forest Destinations
 - Maine Woods Recreation Area & Acadia National Park
 - Bangor as rail/bus/air hub
- **Heritage and Contemporary Culture**
 - Expand, Upgrade & Cluster Attractions
 - Long term: Seek National Heritage Area Designation
 - Network Nature & Culture to Shape Itineraries
- **Service Excellence and Quality Jobs**
 - Small business outreach & frontline worker training

Getting to World-Class: Critical Investments **(A Riff on the Quality of Place Report)**

- **Natural Capital: Complete the Necklace**
 - Complementary “green infrastructures”: visitor centers, trails, signage, park & historical site amenities, etc.
- **Built Environment: Revitalize Gateways**
 - Beyond *Maine Street Maine’s* technical assistance
- **Human Capital: Small Business Outreach & Frontline Worker Training**
- **Social Capital: Building Networks**
 - e.g. Maine Woods Destination Tourism Network
- **Transportation Infrastructure**
 - To and through the Maine Woods without cars

Dilemma:

Big Investment Needs

**Meager Current and Prospective
Funding**