



TOURISM ASSOCIATION

Presentation to the Joint Standing Committee on Agriculture, Conservation, and Forestry

Study of conserved lands owned by non-profit conservation organizations

October 12, 2017

The Maine Tourism Association is a non-profit membership organization dedicated to boosting tourism focused businesses in Maine.



The Maine Tourism Association consists of a blend of local leaders and organizations to create economic opportunities for our membership and to promote the unique quality of the Maine tourism experience.



The Maine Tourism Association works closely with the Maine Office of Tourism to help attract visitors to the state, and drive them to membership businesses once they are here.

Overview of the Maine Tourism Association

Approximately 800
lodging
establishments

More than 300
restaurants

More than 80
campgrounds

Numerous
recreation, retail,
and amusement
attractions

More than 1,400 members belong
to the Maine Tourism Association



Publications and distribution

- ▶ *Maine Invites You (MIY)* - official travel planner and adventure guide for Maine. Annual circulation of 300,000
- ▶ *MIY* - official Maine highway map. Annual circulation of 400,000
- ▶ *Maine Guide to Camps & Cottages, Inns & Bed and Breakfasts* - annual circulation of 50,000
- ▶ *Maine Attractions and Services Map* - annual circulation of 100,000

Visitor Information Centers

The Maine Tourism Association operates the seven state Visitor Information Centers (Calais, Fryeburg, Hampden (North and South), Houlton, Kittery, and Yarmouth).

More than 500,000 visitors utilize these centers yearly. All seven VICs are open year-round.





Tourism contributes to quality of life and quality of place

Provides public access

- ▶ Inns and restaurants on the coast
- ▶ Wilderness lodges
- ▶ Campgrounds on lakes and rivers
- ▶ Skiing and hiking in the mountains

Promotes preservation, restoration, and appreciation of historic buildings

Supports downtown shops, museums, historic sites, state parks, and public reserved lands

Economic Impact of Tourism in 2016

Total Sales \$8.86 billion

Jobs Supported 106,000

Total Earnings \$2.56 billion

Total Taxes \$596 million

Visitation 36 million

For purposes of economic impact calculations, visitors are defined as: out-of-state day visitors on tourism related trips and overnight visitors on tourism related trips. These calculations do not include resident day spending.

Total Direct Tourism Expenditures in 2016 - \$5.99 billion

Retail Sales \$1.53 billion

Restaurant/Food \$1.57 billion

Transportation \$48 million

Gasoline \$460 million

Lodging \$1.82 billion

Recreation \$568 million

Although almost every category saw growth over 2015, lodging and recreation saw the largest increases (lodging 10.5% and recreation 12.3%)

Overnight and Day Visitors in 2016

Overnight Visitors

- ▶ Direct spending on tourism-related trips totaled over \$4.5 billion
- ▶ Overnight spending on tourism generated over \$450 million in tax revenue
- ▶ Almost 19 million visitors spent one or more nights in Maine on tourism-related trips

Day Visitors

- ▶ Non-resident, tourism related day travelers to Maine accounted for more than \$1.4 billion in direct expenditures
- ▶ Non-resident day visitor spending generated \$145 million in tax revenue
- ▶ Nearly 17 million non-resident days visitors traveled to Maine

Maine Office of Tourism Visitor Tracking Research 2016 Calendar Year Annual Report

Prepared by DPA marketing firm (March 2017)

This research is the foundation from which the Maine Office of Tourism marketing strategy is built. The visitor research reports offer useful information about our visitor's expenditures, demographics, and interests.

Maine is a Family- Friendly Destination

On average, overnight visitors travel in parties of 3 and one-third travel with children.

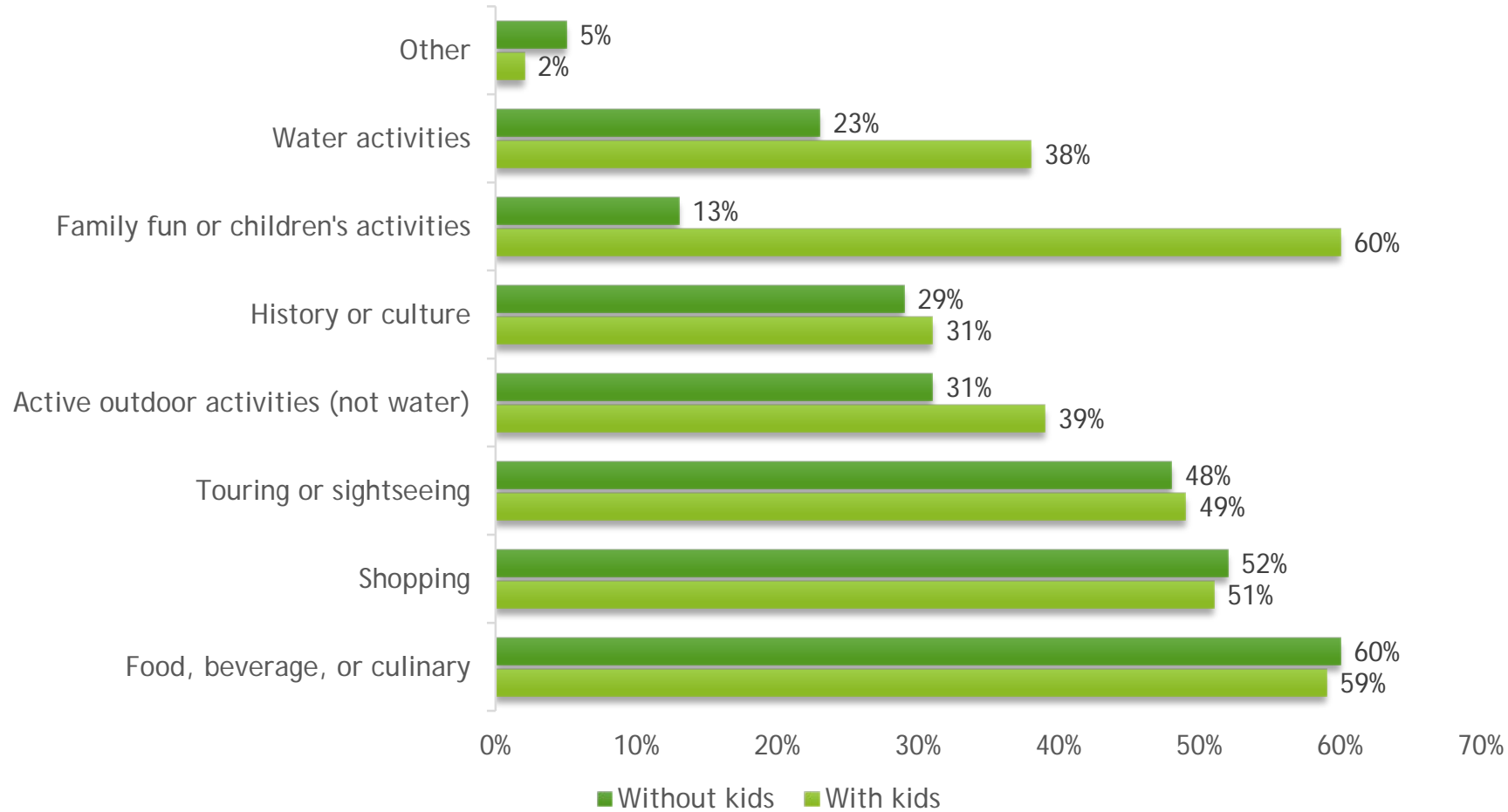
Visitors between the ages of 35 and 44 and those earning more than \$75,000 annually are more likely to be traveling with children.

The average length of stay of those traveling with children 3.7 nights.

The last four years have seen an increase in the proportion of Maine visitors traveling with children.

This travel market stays in Maine for longer periods of time, spends more money, and shows a higher intent to return to Maine and to recommend Maine as a destination.

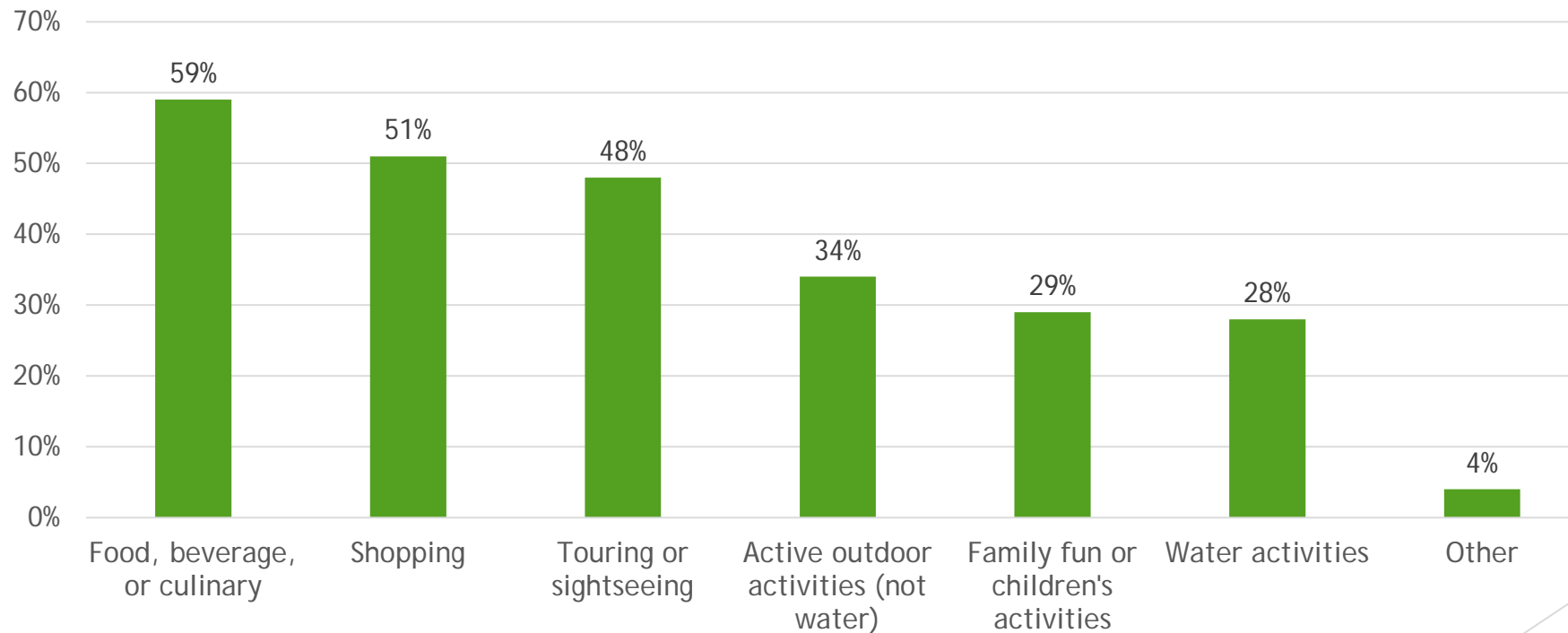
Interest Areas with Children on Trip to Maine



Active outdoor activities, water activities, and family fun/children's activities are all more popular with travel parties that include children.

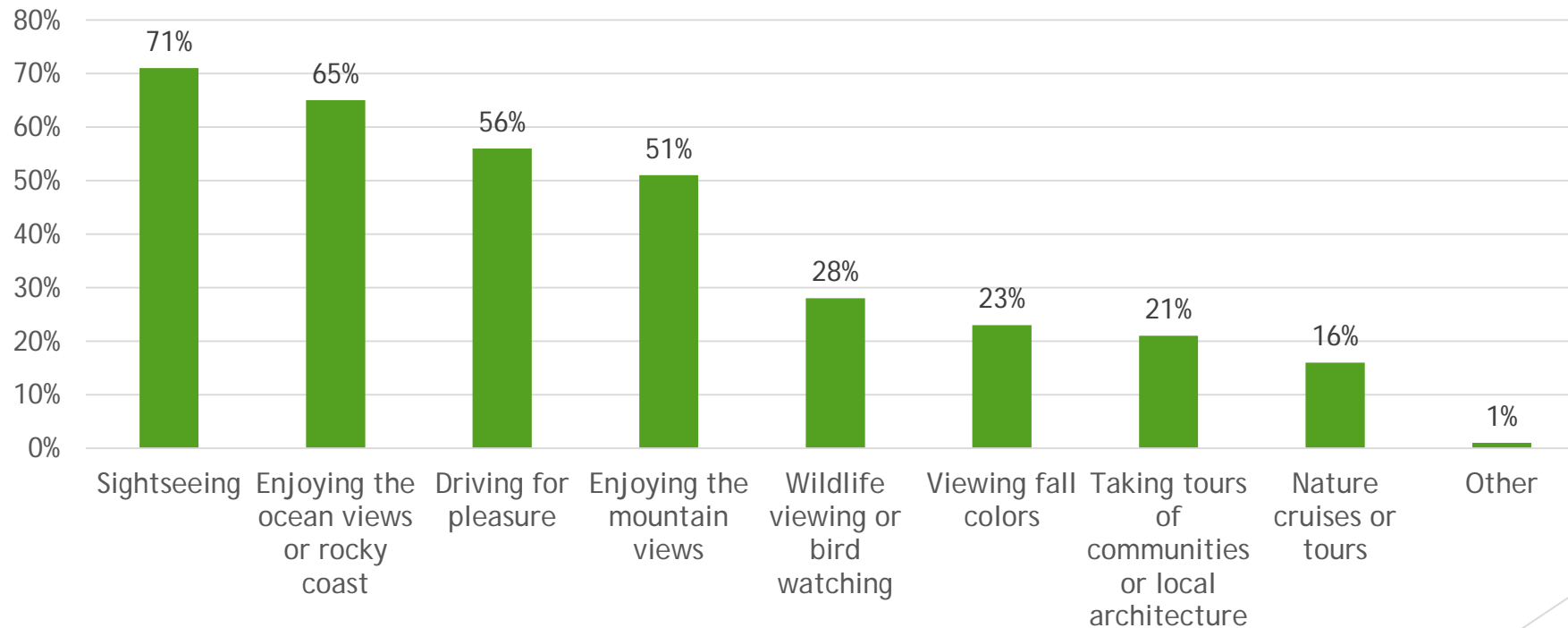
Among those interested in touring/sightseeing, 51% rank it as the most important in their decision to visit Maine. For those interested in active outdoor activities (not water) and water activities, approximately one-third rated these activities as the most important in their decision to visit Maine.

Interest Areas for Overnight Visitors (2016)



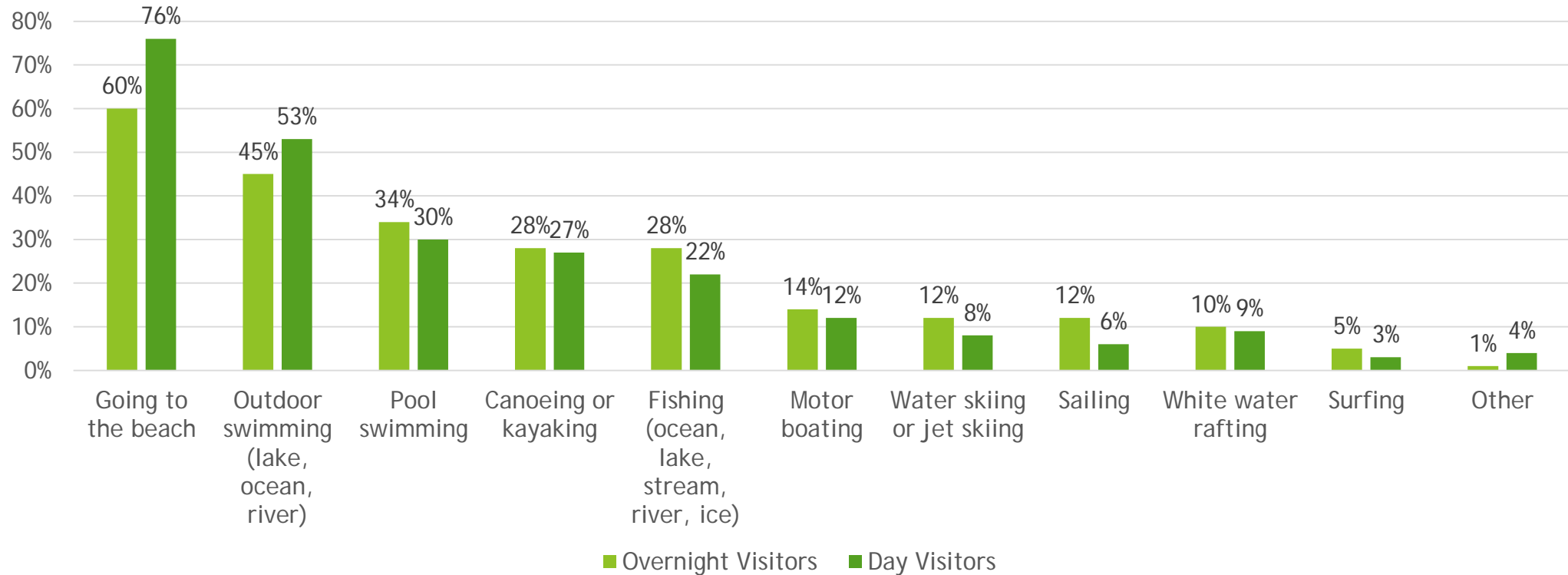
If children are on the trip, there are two categories that the level of interest increases: enjoying mountain views (59%) and wildlife viewing/bird watching (33%).

Touring or Sightseeing Activities



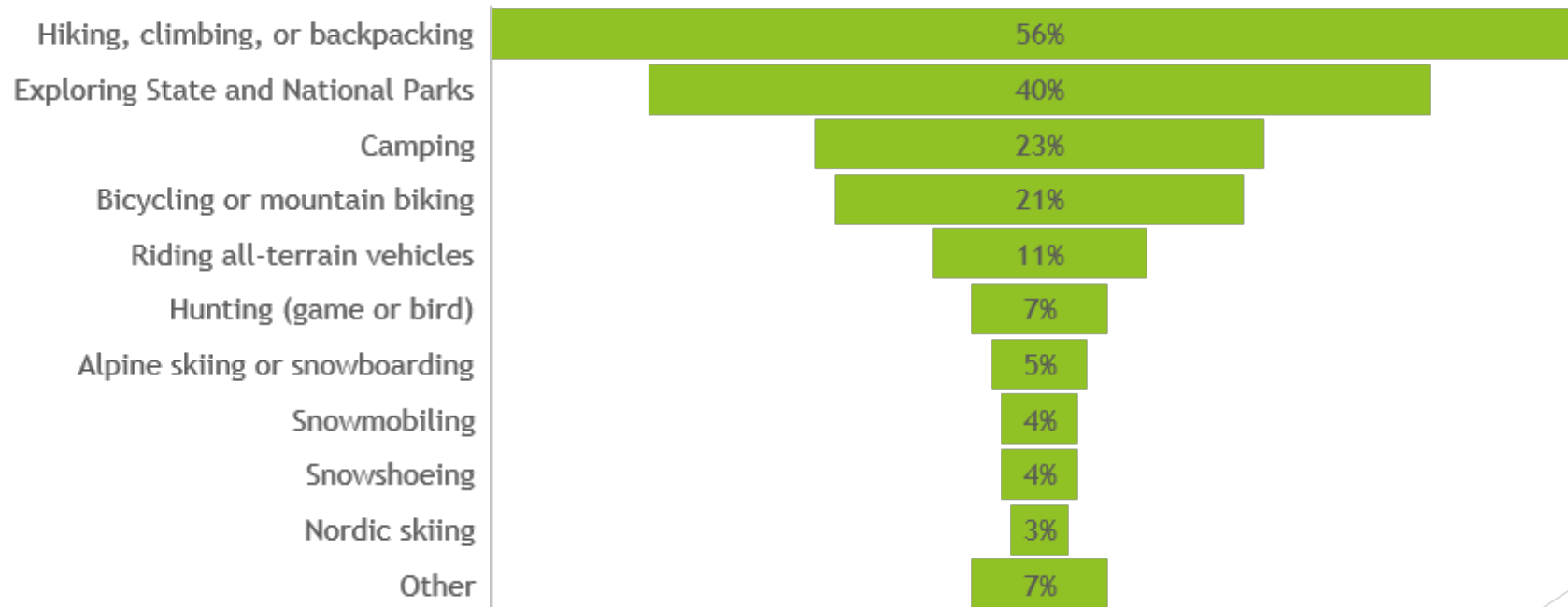
Canoeing/kayaking and fishing increased in their popularity for water activities with overnight visitors in 2016 from the previous year. In 2015, 21% of those surveyed expressed interest in canoeing/kayaking and 22% had an interest in fishing.

Water Activities



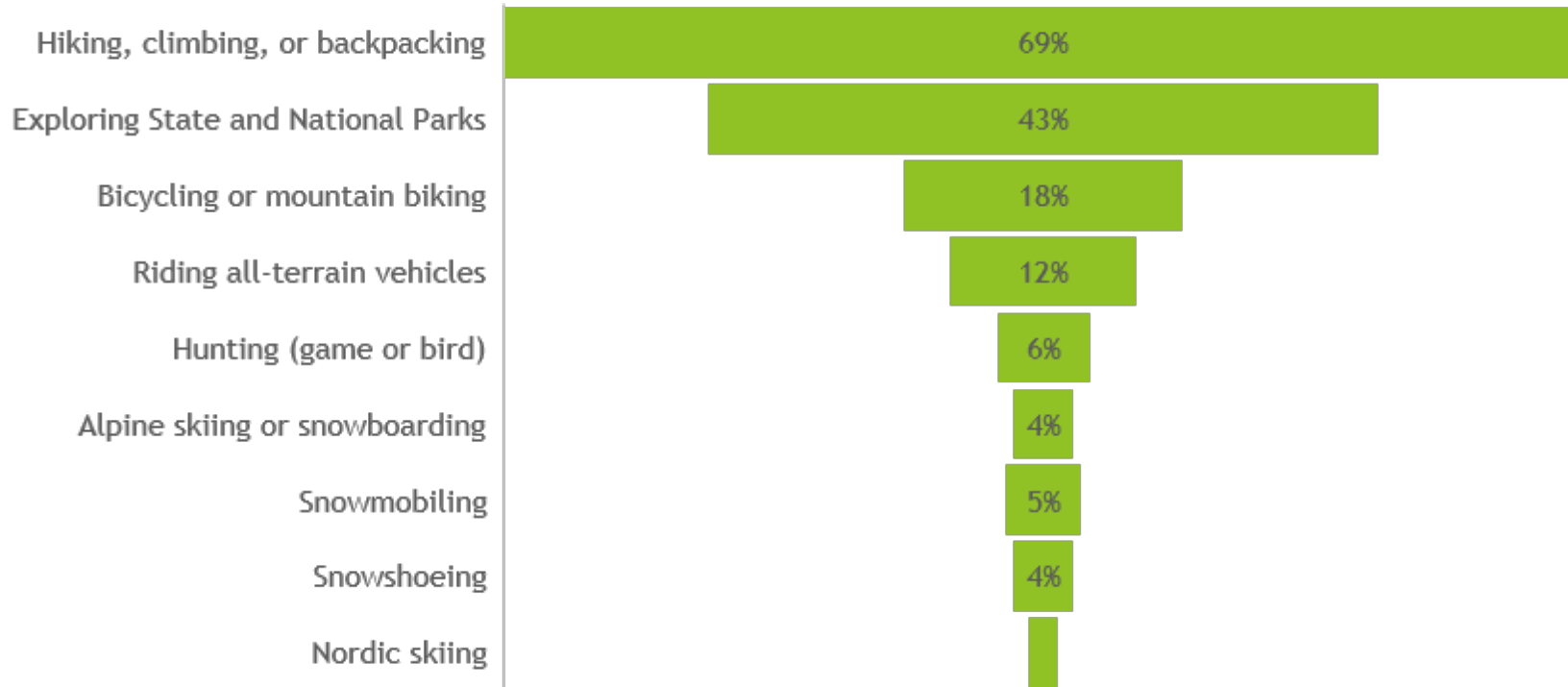
Hiking/climbing/backpacking and exploring State/National Parks are the top activities for overnight visitors interested in outdoor recreation. In 2016, those who went camping increased by 35% from 2015 (17% to 23%).

Active Outdoor Activities (Non Water)



More than two-thirds of day visitors interested in non-water active outdoor activities hike/climb/backpack while in Maine.

Active Outdoor Activities (Non-Water)





Maine Snowmobile Statistics

- ▶ Approximately \$350 million in economic activity generated annually, including \$17.5 million in sales tax revenue
- ▶ Accounts for the full-time equivalent of 2,300 jobs in Maine
- ▶ Snowmobile registrations topped 85,000 in 2016, a whopping 44% increase from 2015. Non-resident registrations increased 60%
- ▶ More than 14,500 miles of snowmobile trails are found in Maine; around 2,000 miles cross public reserved lands

* Information provided by the Maine Snowmobile Association

Maine Hunting and Fishing Data

- ▶ Availability of public access tops the list for “very important” factors in travelers selecting a fishing destination in Maine (more than 50%) (1)
- ▶ Natural beauty of surrounding area also rates high with nonresidents and residents in “very important” factors in their selection. (1)
- ▶ Maine’s wildlife areas and fisheries draw thousands of resident and non-resident sportsmen to our state annually. They spend more than \$200 million on goods and services, with anglers spending \$1,429 per trip and hunters \$1,150 per trip. (2)



(1) *Market Trends, Marketing Highlights & Looking Ahead* (MPGA & MOT report 2016)

(2) *Recreational Hunter and Angler Market Report: Maine* (MOT and DIFW 2015)

Promoting Maine as a Vacation Destination

- ▶ The Maine Office of Tourism receives 5 percent of the 8 percent of the meals tax and 5 percent of the 9 percent of the lodging tax. This generated revenue is dedicated to the Tourism Marketing Promotion Fund, which is used to promote Maine.
- ▶ The Tourism Marketing Promotion Fund budget for FY17 is \$14.6 million, an increase of \$1.5 million from FY 16.
- ▶ Research shows that every \$1 spent on promoting Maine generates between \$7 and \$13 in new revenue.

Public Reserved Lands Promoted by MTA & MOT

STATE PARKS, STATE HISTORIC SITES, AND PUBLIC RESERVED LANDS

Although many of these areas are closed during the fall and winter, visitors may still enjoy them by parking outside and walking in. For more information about accessible facilities in areas managed by the Bureau of Parks and Lands, go to www.parksandlands.com or call 207 287 3521.

- All trails at state parks and public reserved lands have hiking opportunities. Depending on the time of year, some trails in selected state parks also have shared use opportunities for:
 - cross country skiing
 - riding ATVs
 - hanshauk riding
 - riding mountain bikes

ATV, equestrian, and bicycle use is allowed on gravel roads in public reserved lands that have the green use and sign marking "Shared Use Road."

Call municipal parks or public reserved land units for information about specific trail uses allowed in each area.

There are generally no formal picnic areas in Public Reserved Lands. Informal picnicking without fires is permitted.

Camping May 1-Oct 15
 O Camping May 15-Oct 15
 S Camping May 15-Oct 1
 H Camping Memorial Day-Sept 15

Public Reserved Land	Acres	Maine County											
		ANDROSCOGG	CANON	CARROLL	FRANKLIN	HAMPSHIRE	HENRY	Kennebec	Kennebunk	LINCOLN	MADISON	MICHIGAN	WALDO
Androscoggin Riverlands	2558												
Ardenbrook O	644												
Back Point	62												
Bradley Mountain O	582												
Carleton Hill O	5700												
Catawbas Bay O	871												
Crane's Beach	248												
Danversport Lake	9												
Ferry Beach	117												
Fort Point (Fort Penning)	154												
Garbin Island	293												
Harlowe Island Sanctuary	1245												
Lake St. George O	208												
Lansette O	55												
Leif Eric O	284												
McKenzie Island	100												
Moore Point	144												
Oak's Cove	1489												
Old's Pond	778												
Old's Pond	278												
Richard's	2917												
Ridge Point	504												
Carroll Pond	1404												
Deer Lake	27000												
Empire Lake	2382												
Fort Pond	406												
Fort Pond	3646												
Fort Pond	8017												
Fort Pond	1941												
Fort Pond	8500												
Fort Pond	10047												
Fort Pond	10018												
Fort Pond	17753												
Fort Pond	18122												
Fort Pond	8214												
Fort Pond	42318												
Fort Pond	623												
Fort Pond	19707												
Fort Pond	10704												
Fort Pond	10749												
Fort Pond	1077												
Fort Pond	10027												
Fort Pond	16700												
Fort Pond	27369												
Fort Pond	40478												
Fort Pond	18928												
Fort Pond	9930												
Fort Pond	2055												

Public Reserved Land	Acres	Maine County												Approximate Opening and Closing Dates					
		ANDROSCOGG	CANON	CARROLL	FRANKLIN	HAMPSHIRE	HENRY	Kennebec	Kennebunk	LINCOLN	MADISON	MICHIGAN	WALDO	May 1-Oct 15	May 15-Oct 15	May 15-Oct 1	Memorial Day-Sept 15		
Androscoggin Riverlands	2558																		
Ardenbrook O	644																		
Back Point	62																		
Bradley Mountain O	582																		
Carleton Hill O	5700																		
Catawbas Bay O	871																		
Crane's Beach	248																		
Danversport Lake	9																		
Ferry Beach	117																		
Fort Point (Fort Penning)	154																		
Garbin Island	293																		
Harlowe Island Sanctuary	1245																		
Lake St. George O	208																		
Lansette O	55																		
Leif Eric O	284																		
McKenzie Island	100																		
Moore Point	144																		
Oak's Cove	1489																		
Old's Pond	778																		
Old's Pond	278																		
Richard's	2917																		
Ridge Point	504																		
Carroll Pond	1404																		
Deer Lake	27000																		
Empire Lake	2382																		
Fort Pond	406																		
Fort Pond	3646																		
Fort Pond	8017																		
Fort Pond	1941																		
Fort Pond	8500																		
Fort Pond	10047																		
Fort Pond	10018																		
Fort Pond	17753																		
Fort Pond	18122																		
Fort Pond	8214																		
Fort Pond	42318																		
Fort Pond	623																		
Fort Pond	19707																		
Fort Pond	10704																		
Fort Pond	10749																		
Fort Pond	1077																		
Fort Pond	10027																		
Fort Pond	16700																		
Fort Pond	27369																		
Fort Pond	40478																		
Fort Pond	18928																		
Fort Pond	9930																		
Fort Pond	2055																		

► *Maine Invites You* has a two-page layout listing all of Maine's public reserved lands, state parks, and state historic sites along with their location, amenities, allowed-uses, and seasonality of the sites.

MOT has a page dedicated on its website specifically for public reserved land, with detailed descriptions and links to each of the lands (shown below).



PUBLIC RESERVED LAND

Maine's public reserved lands comprise more than half a million acres of protected wilderness. You can explore many of Maine's natural features at these multi-use areas, such as all seven summits of the Bigelow Mountain Range. You can go hiking, camping, fishing or cross-country skiing while keeping an eye out for moose and bald eagles. Some campgrounds charge a fee. The Maine public lands are also home to a portion of the 740-mile Northern Forest Canoe Trail, which winds through northern Maine on its way to the Canadian border. No matter what time of year you visit, you'll be sure to find your own secluded spot of wilderness, as many of these lands are only accessible via unpaved private roads.

Many of Maine's more than half a million acres of [Public Reserved Lands](#) offer backcountry recreation and camping in wild and remote locations. Camping is allowed at most of the 29 land units that range in size from 500 to more than 43,000 acres. You should be prepared for and have experience in rugged wilderness camping, as public reserved lands—unlike state parks—are not staffed. Land units set around mountains are destinations for camping and hiking, while other locations feature primitive oceanfront tent sites or remote waterways for canoeing, kayaking or fishing. Camping is free on most lands, but you'll need to pay a use fee at a handful of the units. Large lakes such as Moosehead, Flagstaff and the Upper and Lower Richardson Lakes have public islands accessible to campers.

Strengths and Opportunities for Maine's Tourism Industry

Strengths

- ▶ Iconic natural attractions, national, and state parks
- ▶ Global demand for authentic nature- and heritage-based experiences is growing and Maine is well placed to meet this demand
- ▶ Strong agreement among industry members that tourism is an important source of revenue for the state and businesses; the livelihoods of many people and businesses depend on it; and tourism leads to additional economic growth, helps Maine businesses to reinvest in themselves, and leads to broader economic development

Opportunities

- ▶ Growth in “experiential travel,” increased social, culture-heritage and environmental awareness, and trends toward trips focused on matching one’s personal identity and values
- ▶ Maine’s assets critical to attracting visitors include its natural landscape, natural resources, wildlife, and the means for enjoying those things



Maine Office of Tourism Marketing Campaign for 2017

- ▶ MOT launched a new marketing campaign in 2017 in an effort to continue tourism growth, called “This is Me.”
- ▶ The intent of the campaign is to frame Maine as a lifestyle brand, not just a destination.
- ▶ Focusing on strengths and opportunities identified by MOT, the marketing features everyday Mainers and beautiful scenery and encourages visitors to come for an authentic experience.
- ▶ Visitors desire unique experiences that give them a deeper connection to the state beyond what is considered a typical attraction.