

Bethel Area Communities Destination Summit



Program for tourism summit

- Welcome and Intros
- Review of Bethel Area Tourism Destination Academy work
 - Global data and tourism trends
 - Bethel Area planning and vision for future
 - Introduce Strategic Tourism Pillars
- Pillar Discussion
 - Review purpose and desired outcome
 - Review Big Ideas for action and add any additional ideas
 - Prioritization – add your dots on high priority projects to build a sustainable tourism industry
- Report Outs – by Pillar teams - survey
- Next Steps – Local Leadership Team
- Closing Comments



Review Module 1 and 2





Forces impacting
tourism trends in the
world (and regions)

What are the
emerging macro
drivers....

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Macro Trends and Forces of Change Related to . . .

- Population driving regional economies
- The evolving society
- Technology and speed of change



AN URBAN WORLD



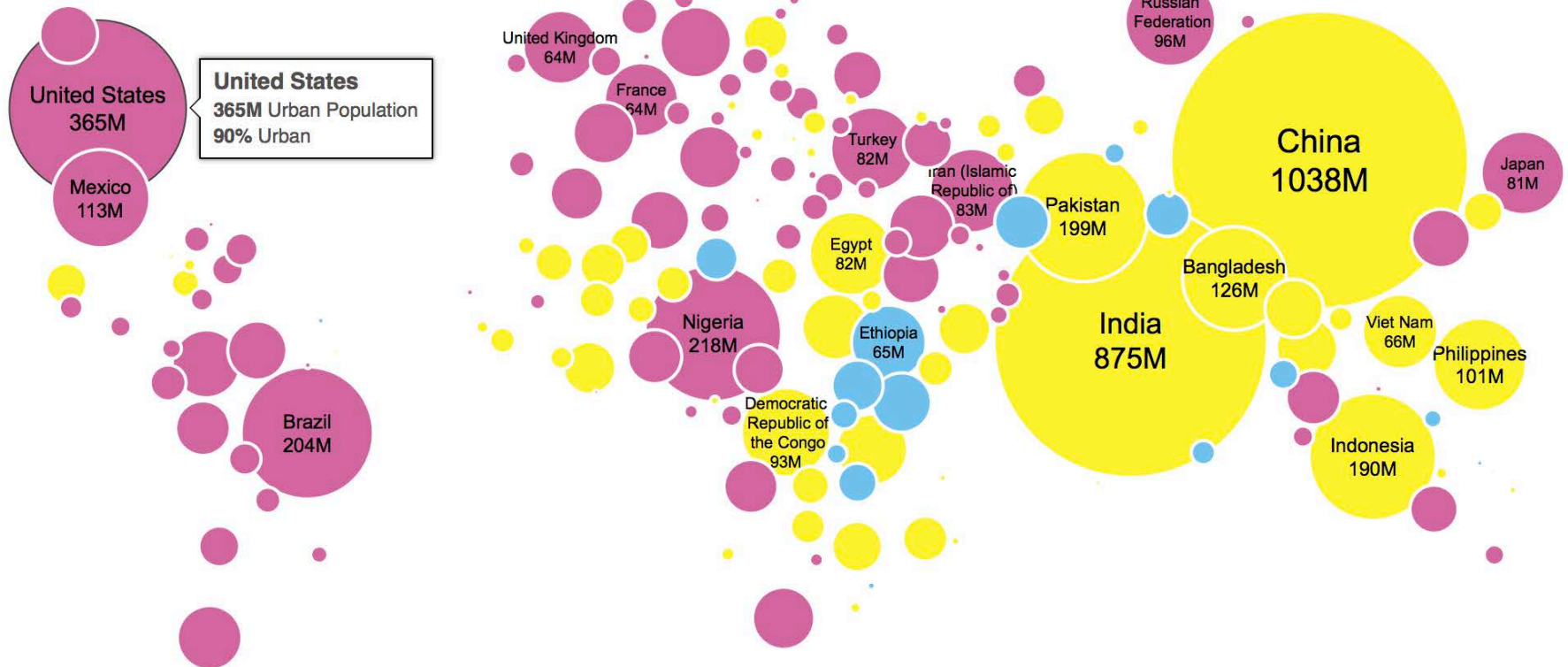
This graphic depicts countries and territories with 2050 urban populations exceeding 100,000. Circles are scaled in proportion to urban population size. Hover over a country to see how urban it is (percentage of people living in cities and towns) and the size of its urban population (in millions).

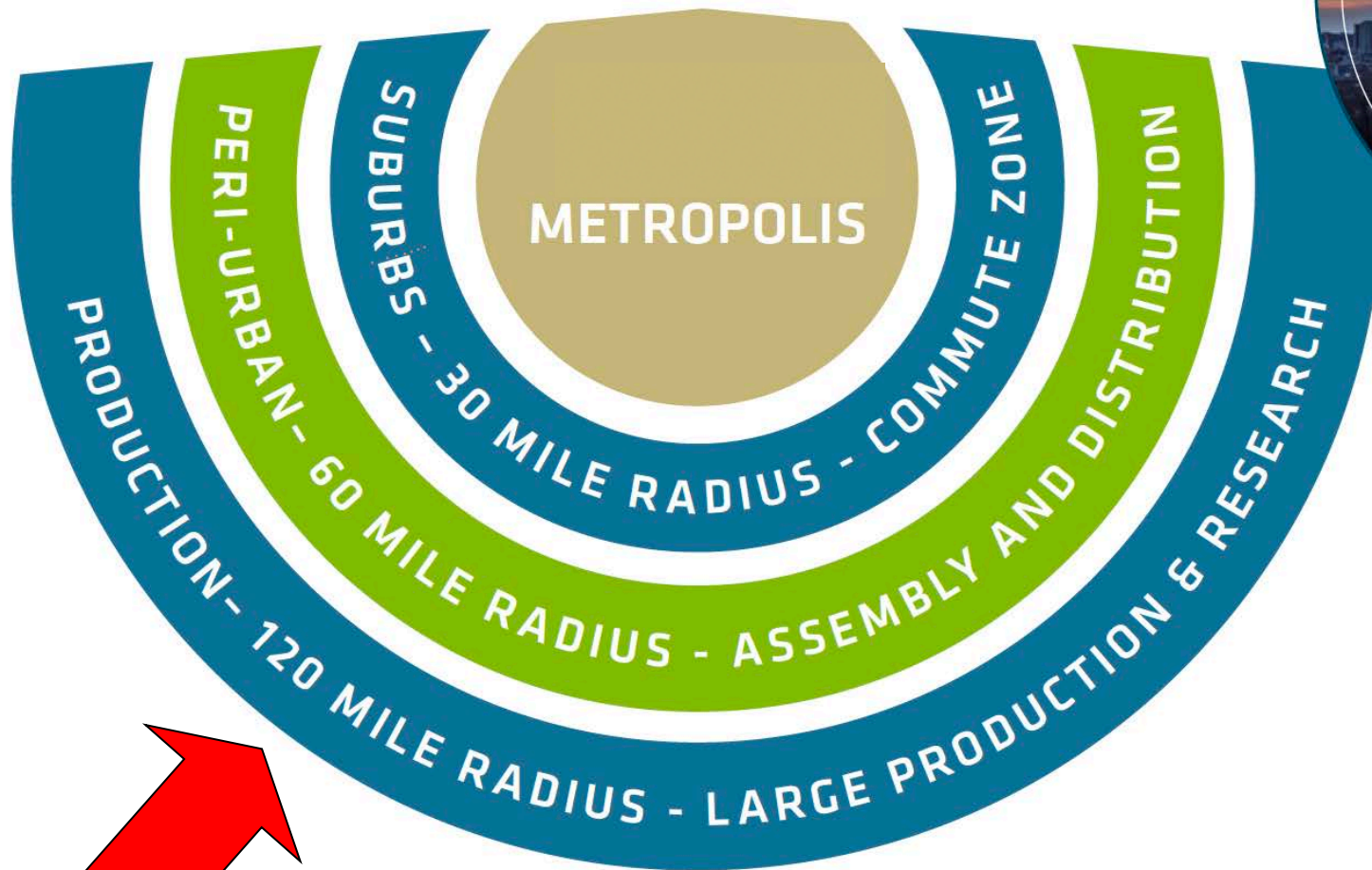
Urban Population

- Greater than 75%
- 50% - 75%
- 25% - 50%
- Less than 25%



2050



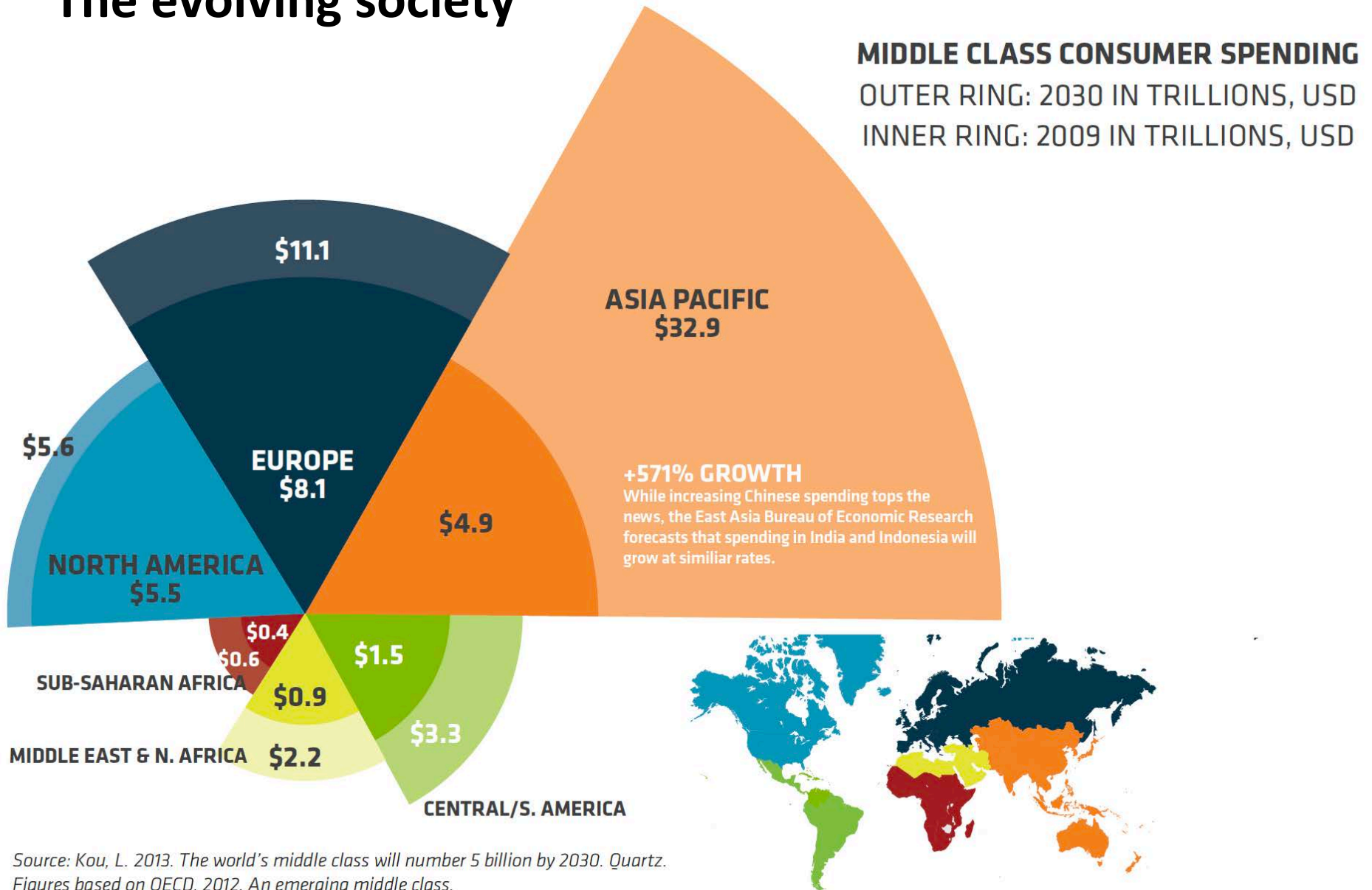


**Outdoor Recreation –
The Maine Woods**

Does this mean people will increasingly seek outdoor experiences and escape?

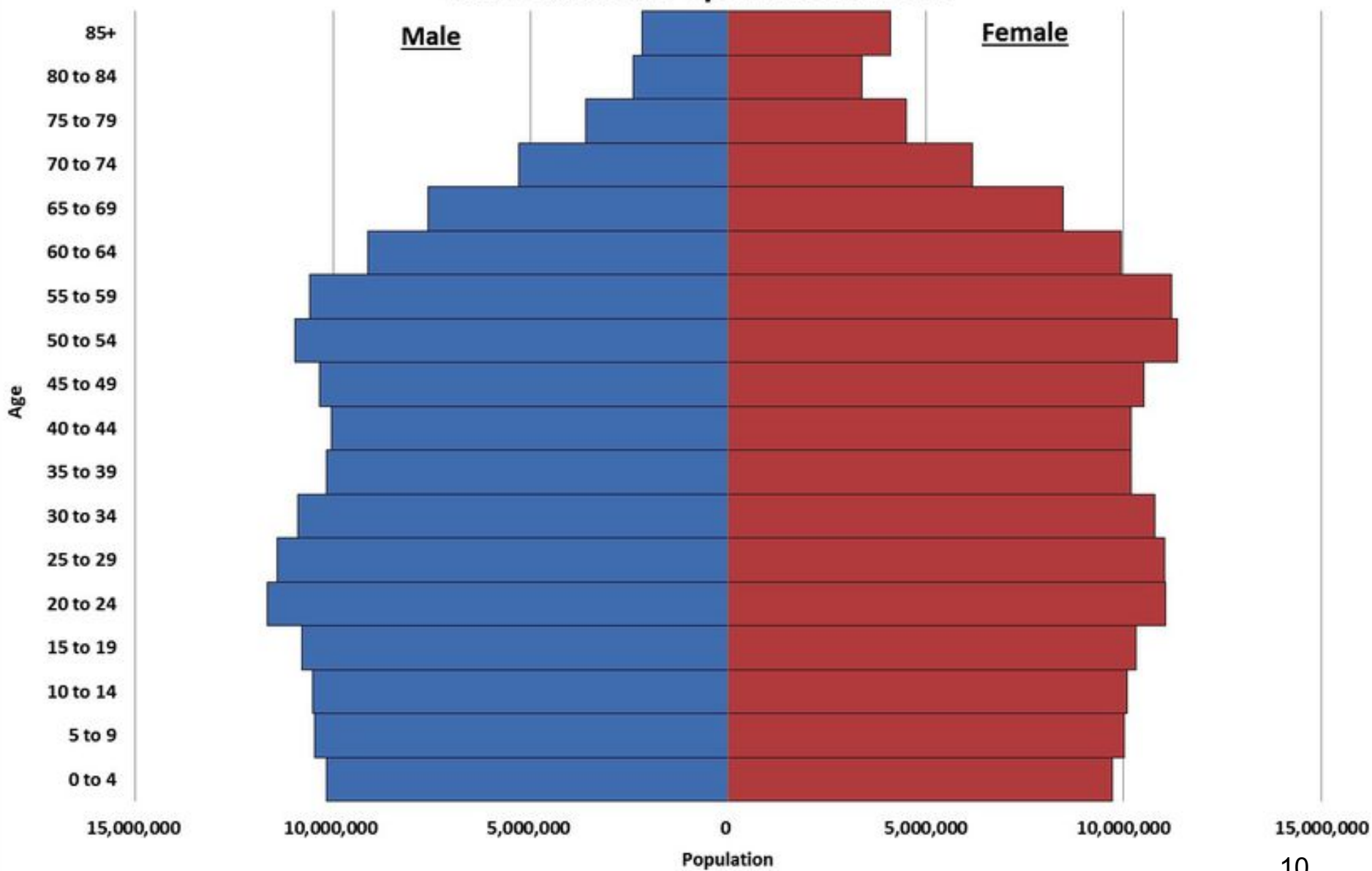


The evolving society



Source: Kou, L. 2013. The world's middle class will number 5 billion by 2030. Quartz.
Figures based on OECD, 2012. An emerging middle class.

**Chart 1: Population Pyramid of the U.S.
Total Resident Population in 2015**



Source: U.S. Census Bureau, Vintage 2015 Population Estimates.



Blow in her face and she'll follow you anywhere.

Hit her with tangy Tipalet Cherry. Or rich, grape-y Tipalet Burgundy. Or luscious Tipalet Blueberry. It's Wild! Tipalet. It's new. Different. Delicious in taste and in aroma. A puff in her direction and she'll follow you, anywhere. Oh yes.... you get smoking satisfaction without inhaling smoke.



New from Muriel.

About 5 for 25¢.

Smokers of America,
do yourself a flavor.
Make your next
cigarette a

Tipalet®

For a better start in life
start COLA earlier!



- Promotes Active Lifestyle!
- Boosts Personality!
- Gives body essential sugars!

How soon is too soon?

Not soon enough. Laboratory tests over the last few years have proven that babies who start drinking soda during that early formative period have a much higher chance of gaining acceptance and "fitting in" during those awkward pre-teen and teen years. So, do yourself a favor. Do your child a favor. Start them on a strict regimen of sodas and other sugary carbonated beverages right now, for a lifetime of guaranteed happiness.

The Soda Pop Board of America
1515 W. Hart Ave. - Chicago, ILL.

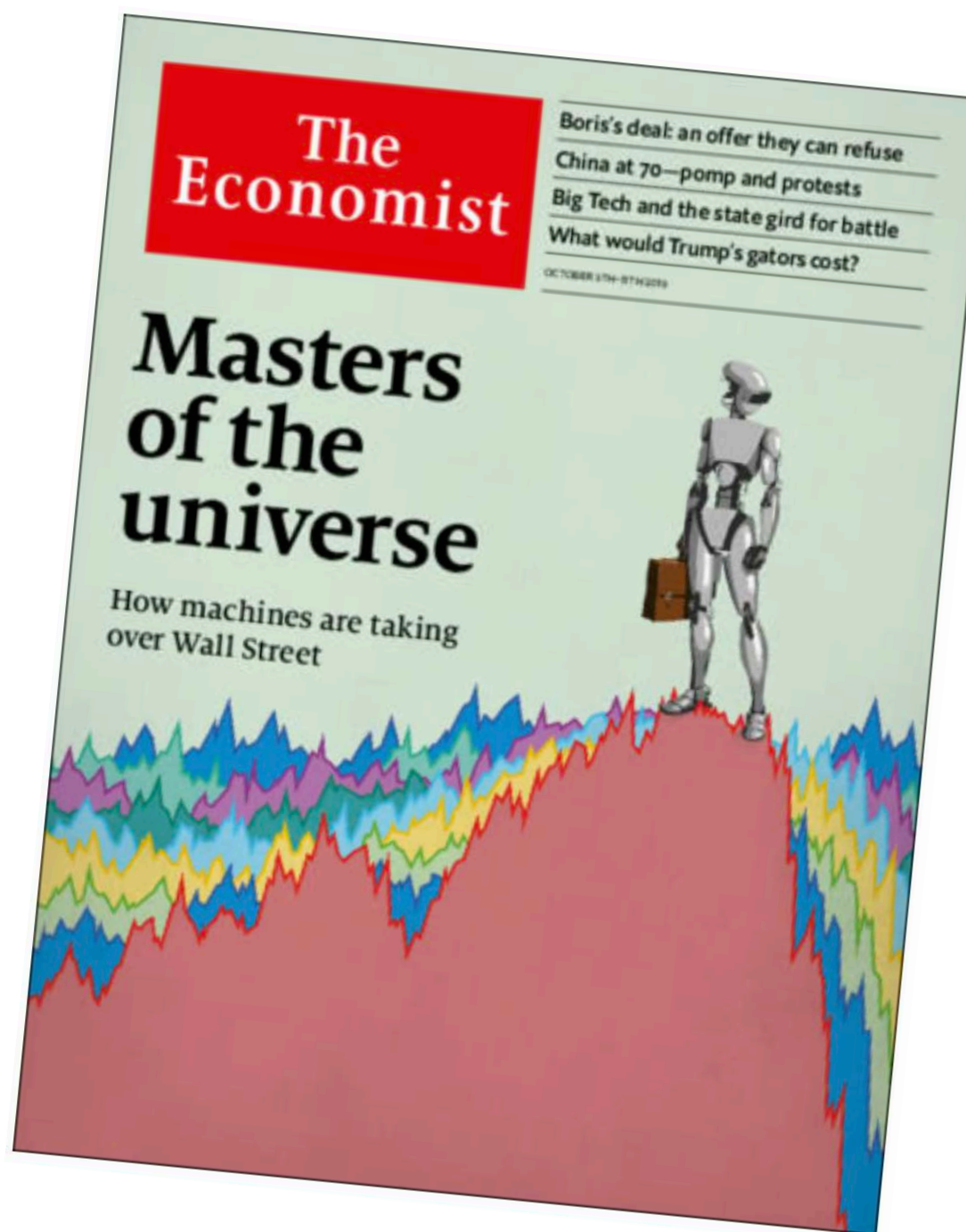
Emerging generations will have different values and expectations



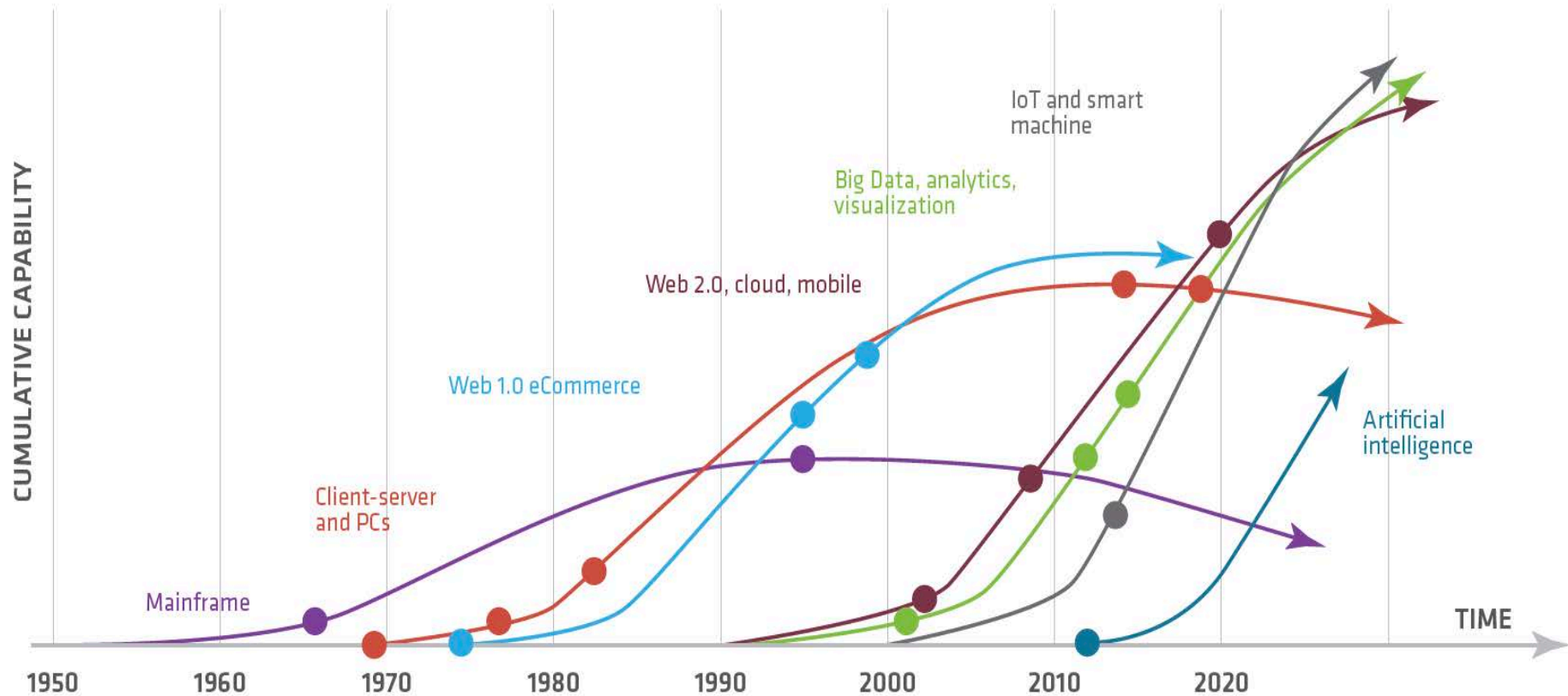
Technology – and speed of change

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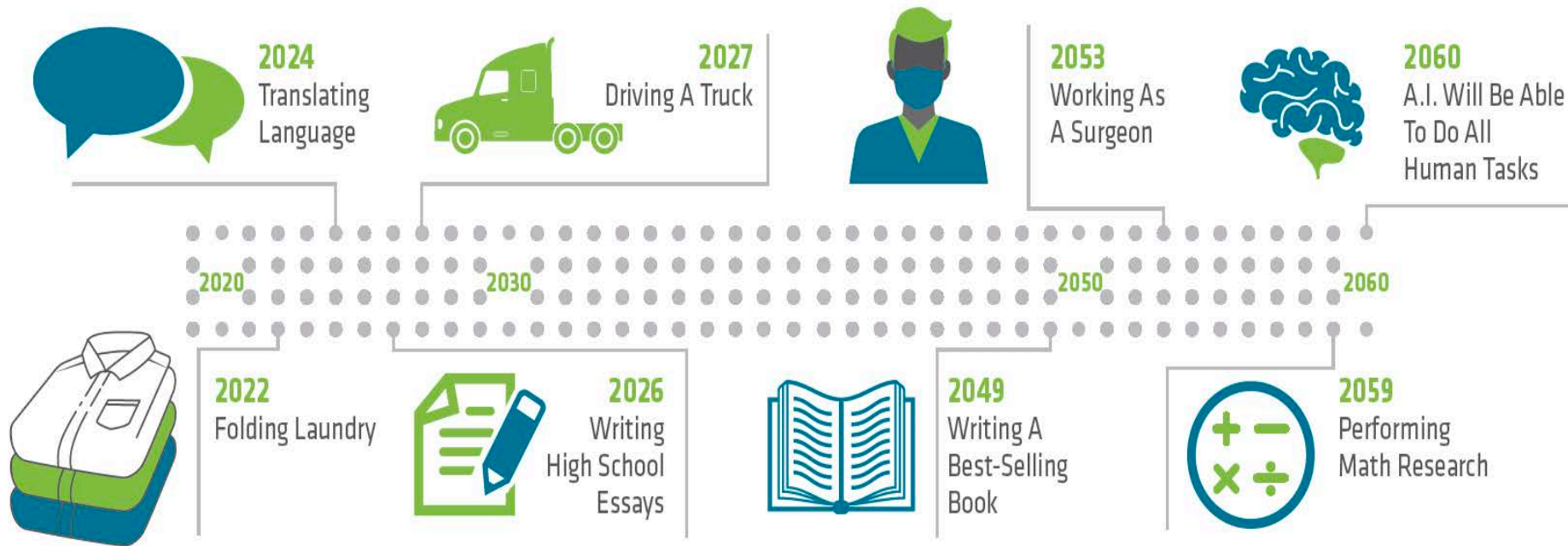
THE INCREASING CAPABILITY OF DIGITAL TECHNOLOGIES



Digital Transformation Initiative Mining and Metals Industry, White Paper, World Economic Forum / Accenture analysis, January 2017

When will machines outperform people?

AI WILL LIKELY OUTPERFORM HUMANS AT...



Source: 'You Will Lose Your Job to a Robot--and Sooner Than You Think'. Kevin Drum, Mother Jones, November / December Issue, 2017. (adapted from 'When will AI exceed human performance? Evidence from AI Experts', Oxford and Yale University 2017)¹²

Key Emerging Tourism Trends



Emerging Tourism Trends

Experiences

Seeking new and place-based experiences such as outdoor adventure, cultural activities, and culinary opportunities.

Packages

Experiential travelers desire full day(s) with a variety of activities, often preferring to book at one time with professional services.

Sharing Economy

The sharing economy is growing throughout the industry in accommodation, transportation, meals, and booking activities.



Technology

Travelers are increasingly booking through online and mobile apps, leaving reviews and staying connected.

Peer to Peer Influence

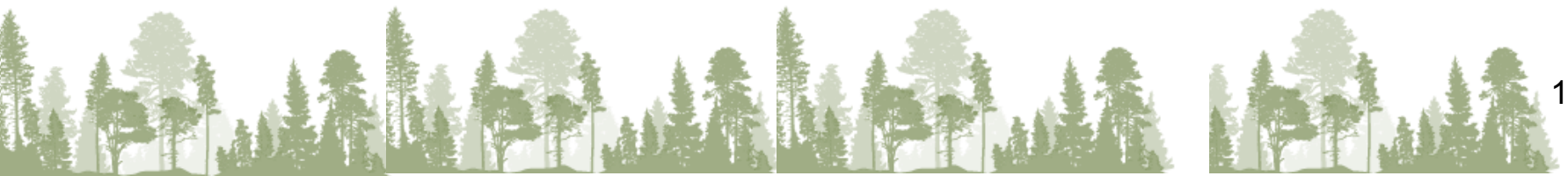
Trip Advisor, Facebook, Snapchat and other platforms allow for immediate documentation of a trip including recommendations.

Destinations

Travelers are choosing destinations based upon culture, people and diving into the unique local feel and an authentic experience.

Sustainability

Travelers are increasingly making decisions based on the impact on the local culture, environment and economy.



INFLUENCE



52% of Facebook users said their friends' photos inspired their holiday choice and travel plans



48%

Social media has a huge influence on travel bookings. Of those who used social media to research travel plans, only 48% stuck with their original plans



33%

Changed
their hotel



7%

Changed
destination



10%

Changed
resorts



5%

Changed
airlines



TRUST

70%

of consumers say they trust earned media, such as word-of-mouth and recommendations from friends and family, above all other forms of advertising.



70%

of global consumers say online consumer reviews are the second most trusted form of advertising



**What do these trends mean for
the future of tourism in the
Bethel area?**



Presentation of Maine Office of Tourism visitor profiles, including what the emerging traveler likes and what visitor data shows in terms of trends, spending and implications for Bethel area



Economic impact analysis



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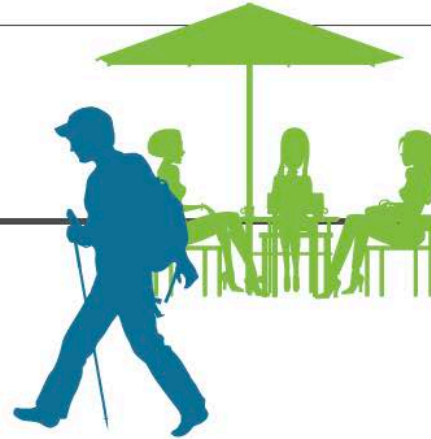
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2017 Status

2030 Goals

15.6
Million Visitors



22.9
Million Visitors

\$2.3
Billion Tourism
Spending



\$5.6
Billion Tourism
Spending



Sustainable Tourism

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The growth paradox: can tourism ever be sustainable?

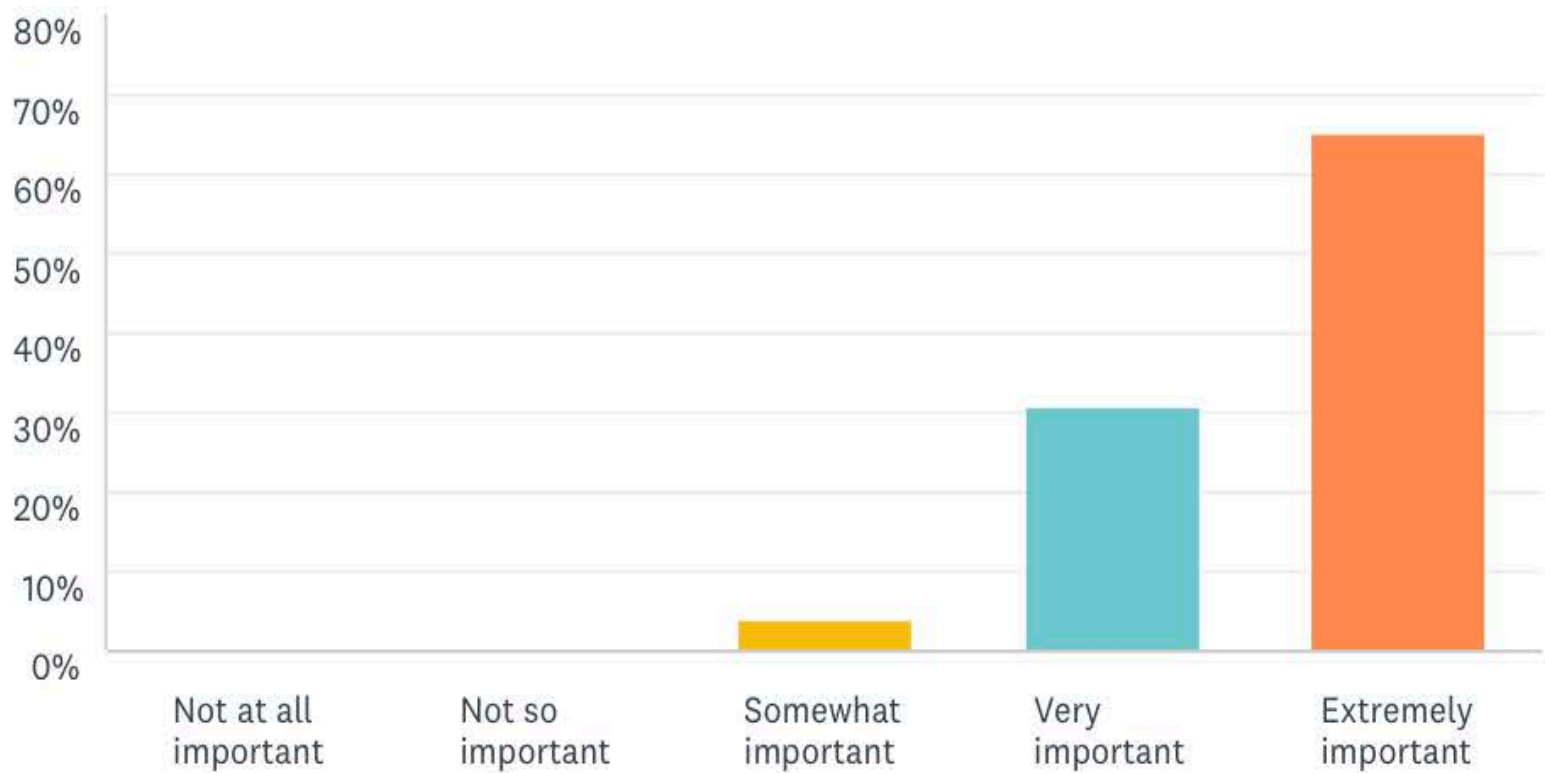


'Travellers tend to arrive in increasing numbers and flock to the same locations'

Image: REUTERS/Stringer

Overall, how important do you think tourism is to the future of the Bethel Area?

Source:

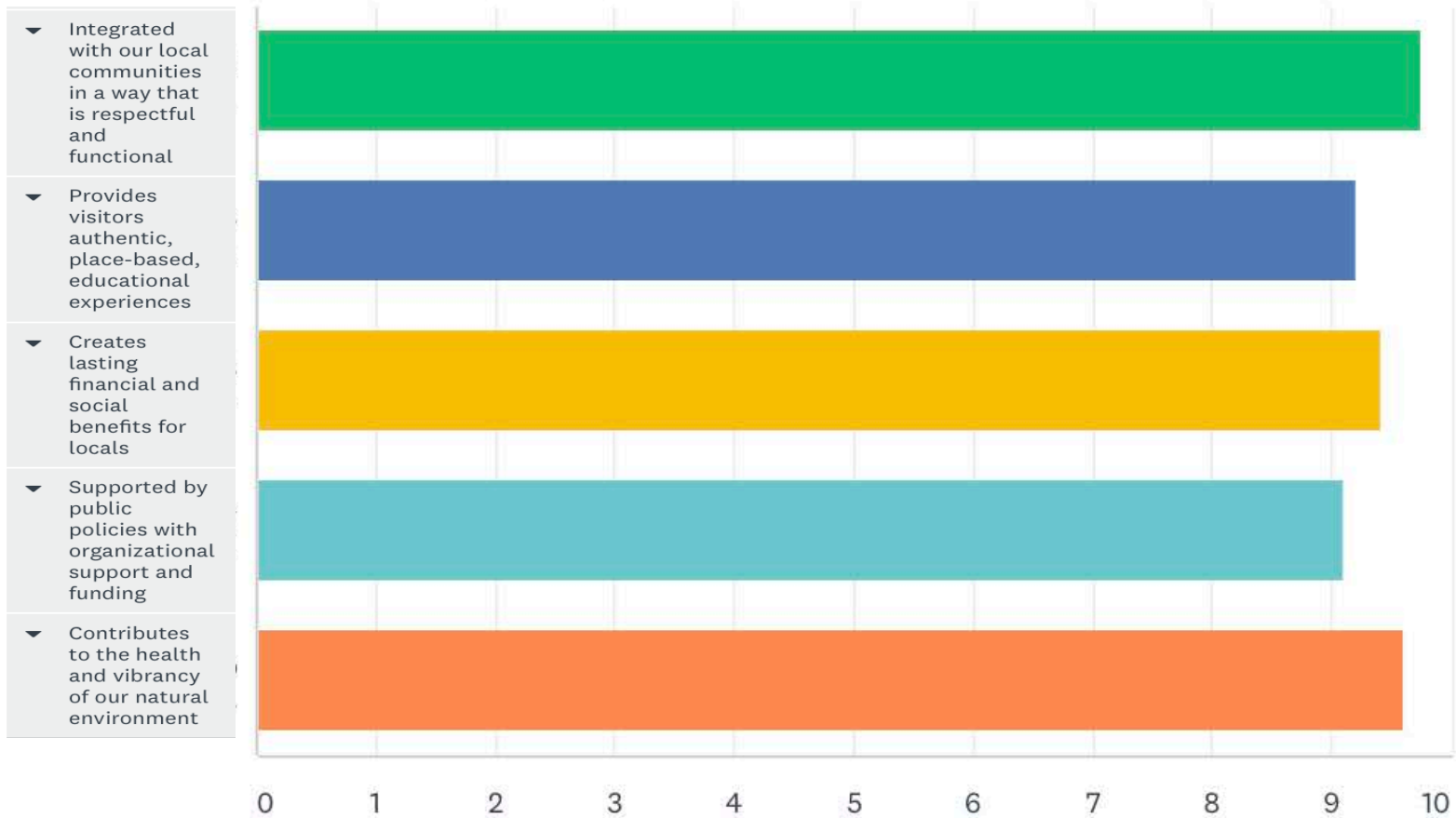


Sustainable Tourism Definition

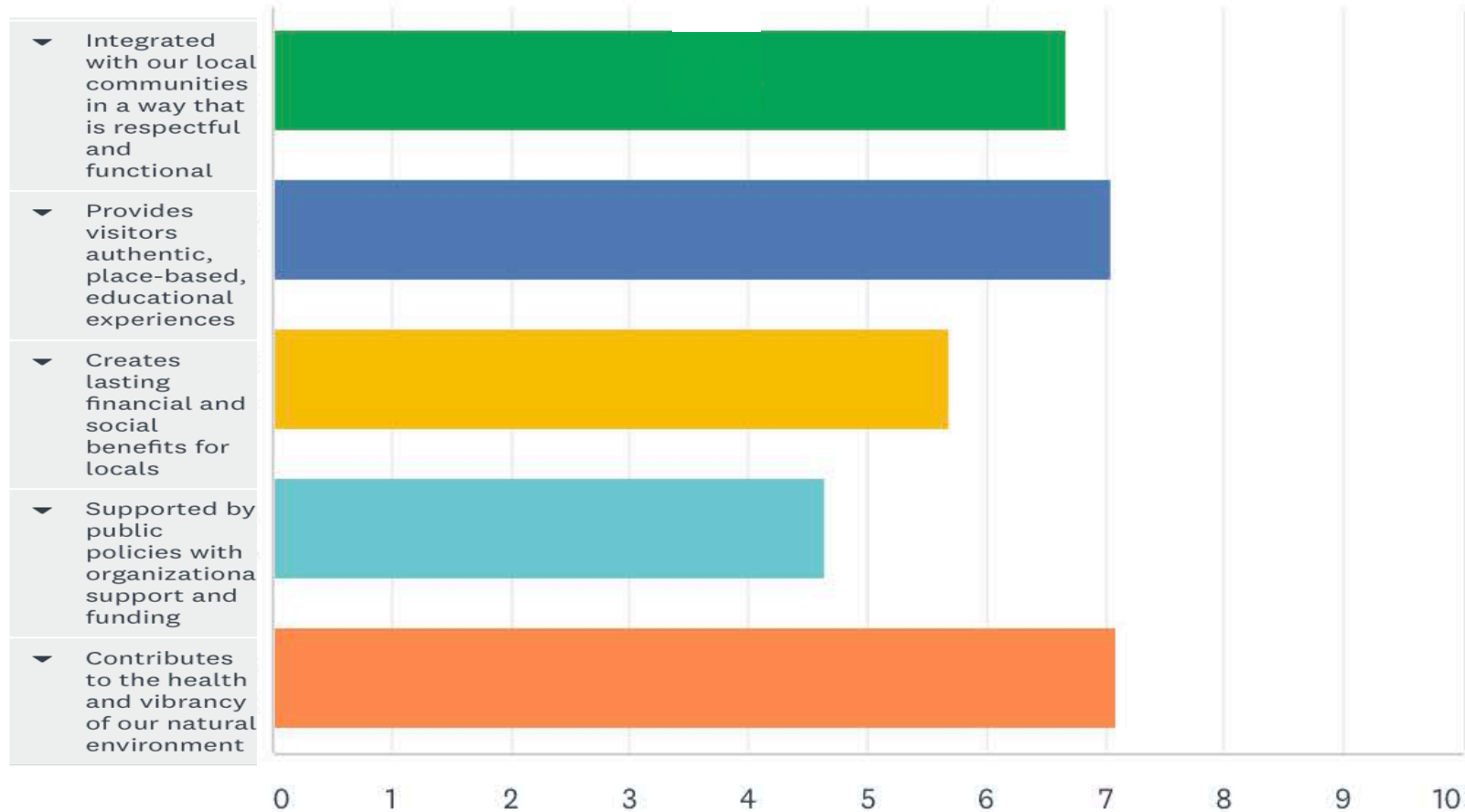
- Is *integrated with our local communities* in a way that is respectful of our diverse heritage and culture;
- Provides visitors with *authentic, place-based, educational experiences* that leave them feeling enriched and inspired;
- Creates *lasting financial and social benefits* for local residents, businesses, and communities across our area;
- Is supported by public policies *with organizational support and funding*; and,
- Maintains, or contributes to, the *health and vibrancy of our natural environment*.



How important do you think each of the dimensions of Sustainable Tourism are for the Bethel Area? Scale: 1 = Not important; 10 = Critically important. If you are unsure, record 'Don't know'



How well do you think the Bethel area is CURRENTLY performing for each of these dimensions of Sustainable Tourism? Scale: 1 = Very Poorly; 10 = Very Well. If you are unsure, record 'Don't know'



Growing a tourism industry – A careful balancing act

Industry Value

Perceived very important - creates economic activity / jobs

Tourism product is largely built on local values and traditional industries

High quality abundant underlying resource of natural landscape

Balance of interests

Tourism industry and its impacts

Community Impacts

Concern about environmental impacts

People, communities and services struggle to cope with rate of influx

Emerging disruption to people's 'quality of life' and contentment

SUSTAINABLE TOURISM

The way out of the 'growth paradox' is to build the industry on a sustainable tourism model where it is viewed through the lens of:

- Focus on impact management
- Seeking collaborative solution

Need to balance key outcomes

Sustainability and investment focus - over the next 10 years, where do you think the Bethel area should aim, on the following continuum from an 'Industry Growth Focus' (growing the number of visitors) to a 'Impact Management Focus' (managing the local impacts of tourism and tourists). Please select the point that reflects your view on this scale.



The Future of Tourism in the Bethel area

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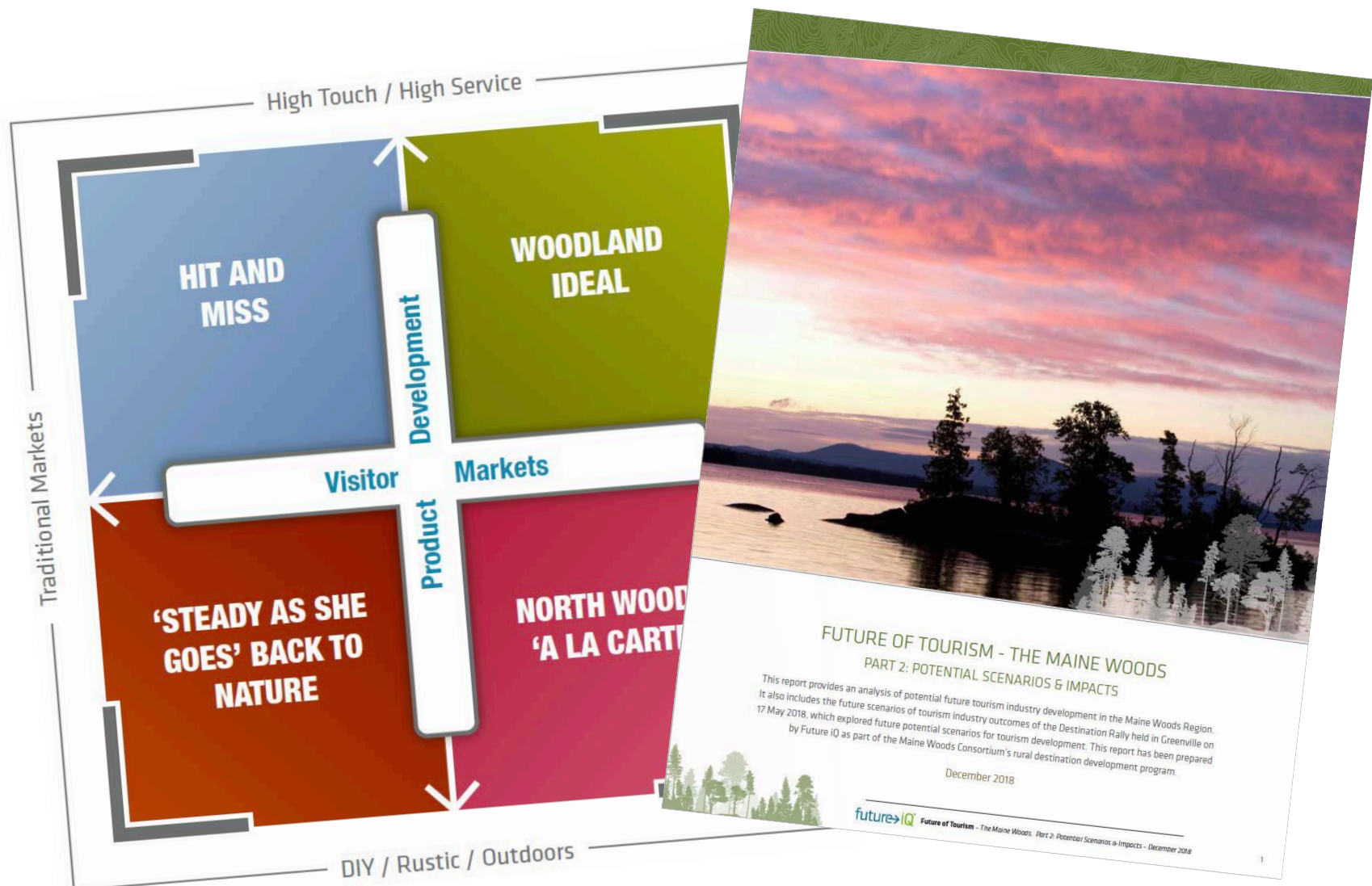


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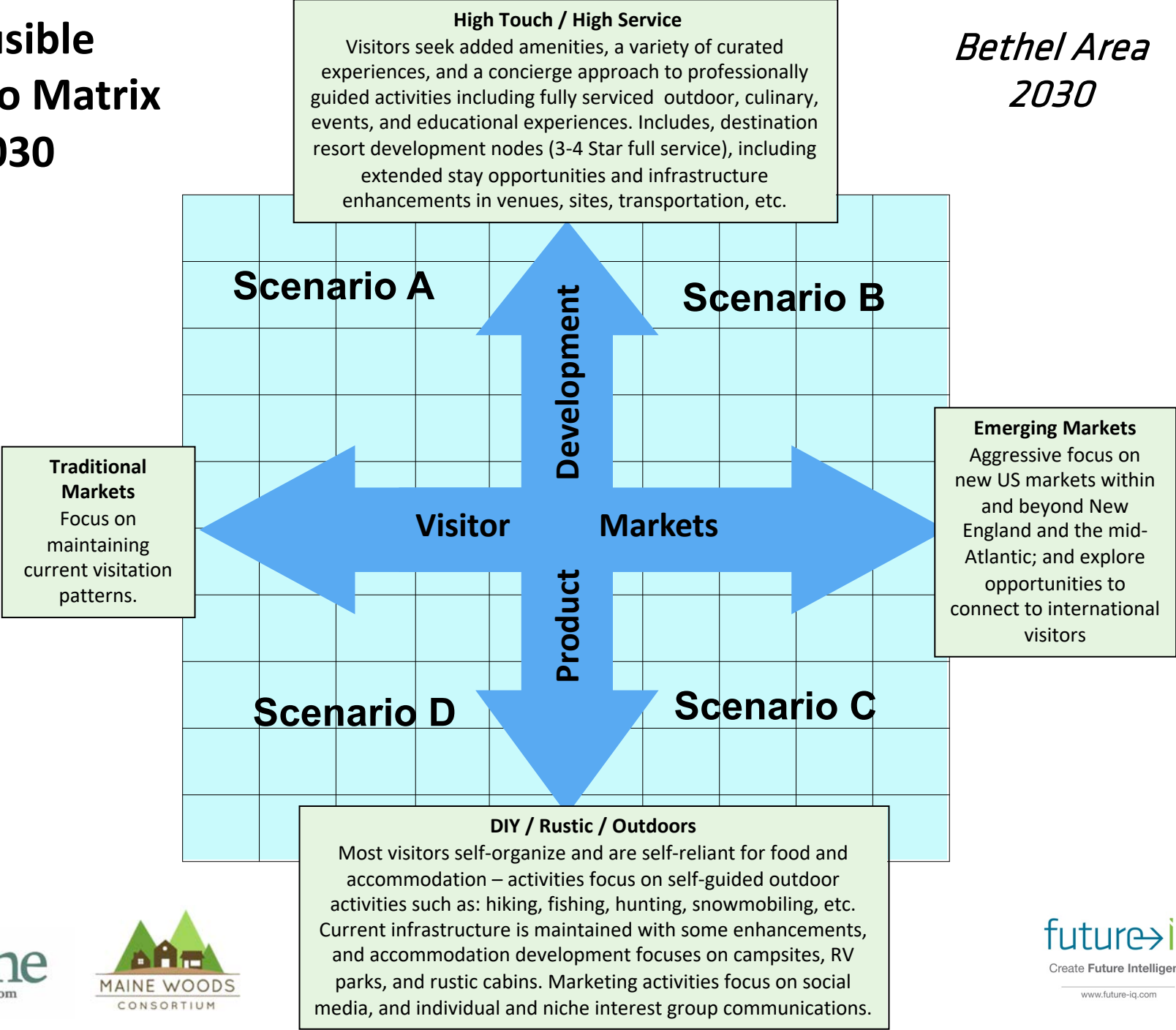
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Scenarios of the future – finding the sweet spot



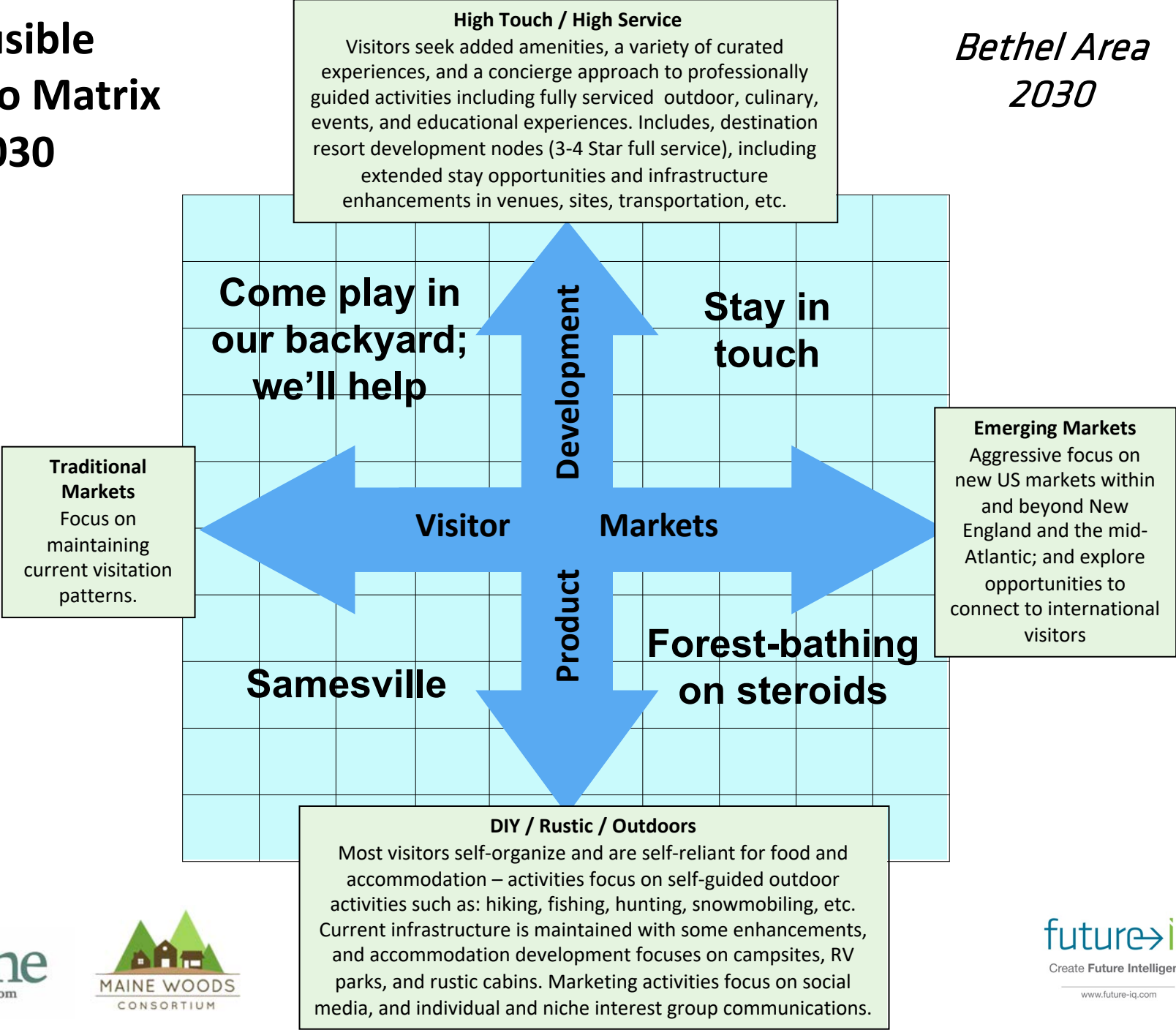
Plausible Scenario Matrix 2030

*Bethel Area
2030*



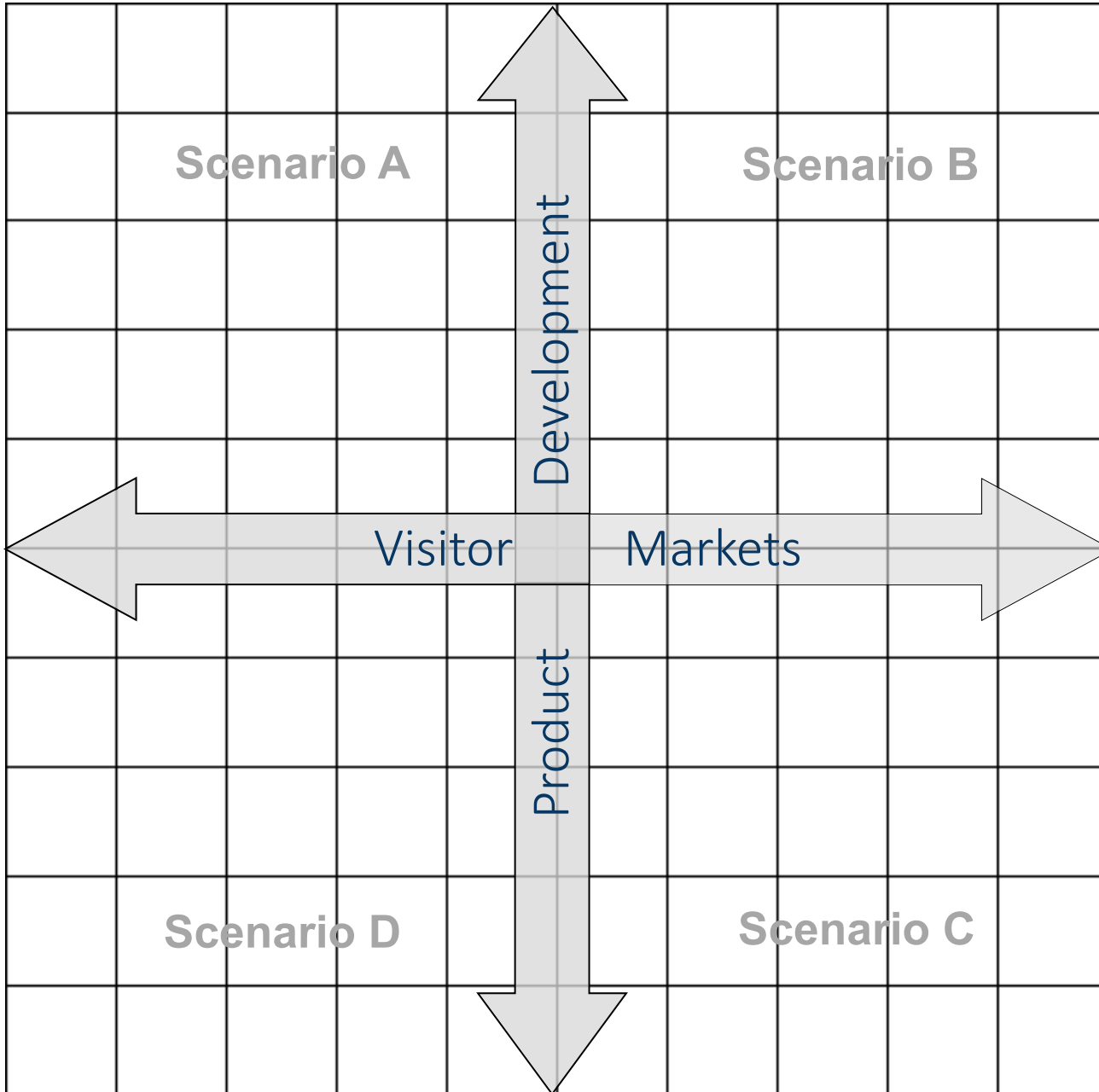
Plausible Scenario Matrix 2030

*Bethel Area
2030*



High Touch / High Service

Traditional Markets



DIY / Rustic / Outdoors

Bethel Area CDA

Instructions

On the grid at the left, please use the following point assignments to rate the preferred and expected futures.

- **EXPECTED FUTURE**
Please assign to any box on the grid:
 - One (1) x E1
- **PREFERRED FUTURE**
Please assign to any box on the grid:
 - One (1) x P1

Emerging Markets

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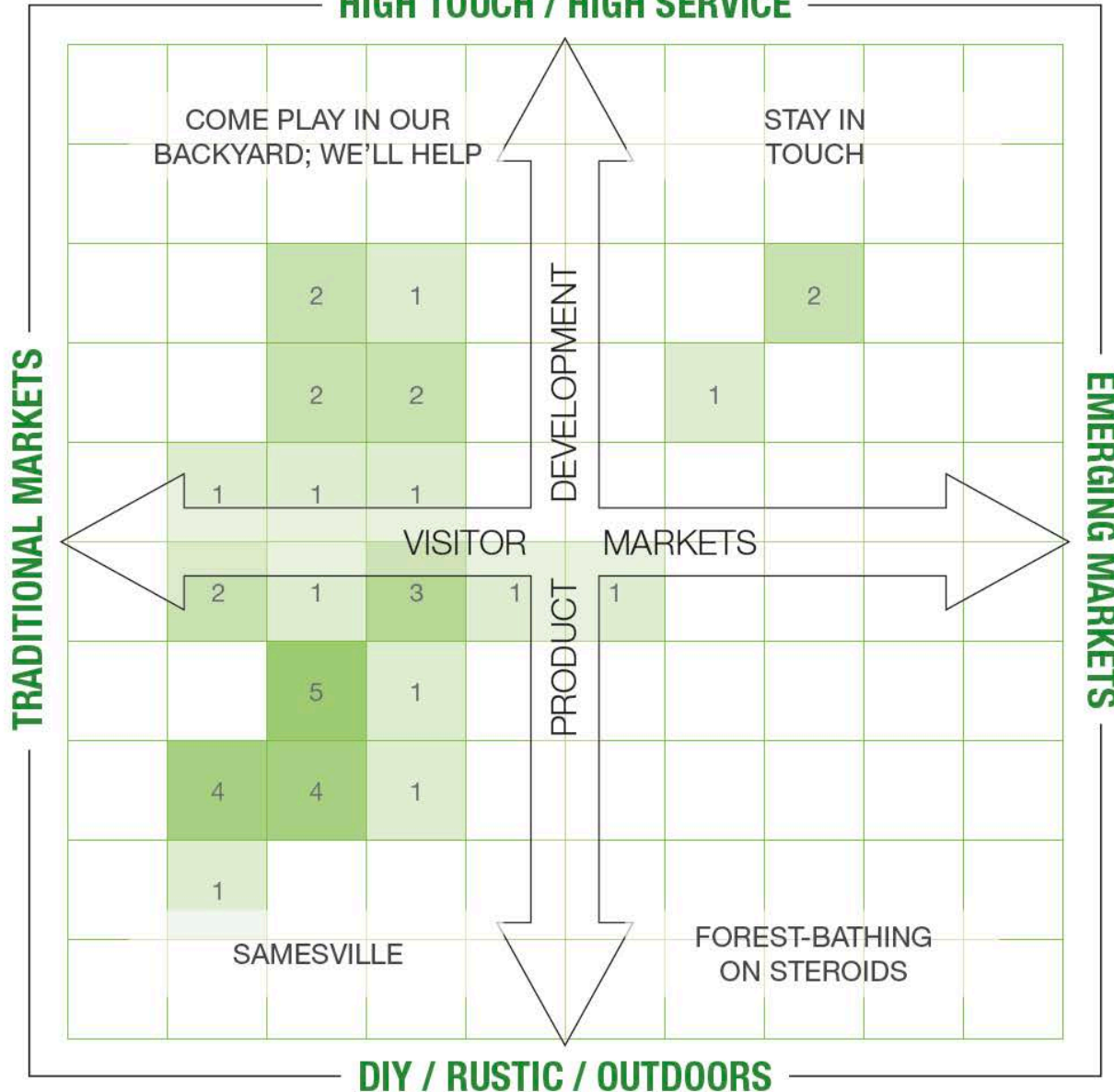
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*Bethel Area
2030*

BETHEL AREA

EXPECTED FUTURE – 2030

HIGH TOUCH / HIGH SERVICE



EXPECTED FUTURE PLAUSIBILITY MATRIX

This grid displays the plausibility level assigned by the workshop participants.

The darker the color, the greater the aggregate weighted plausibility score.

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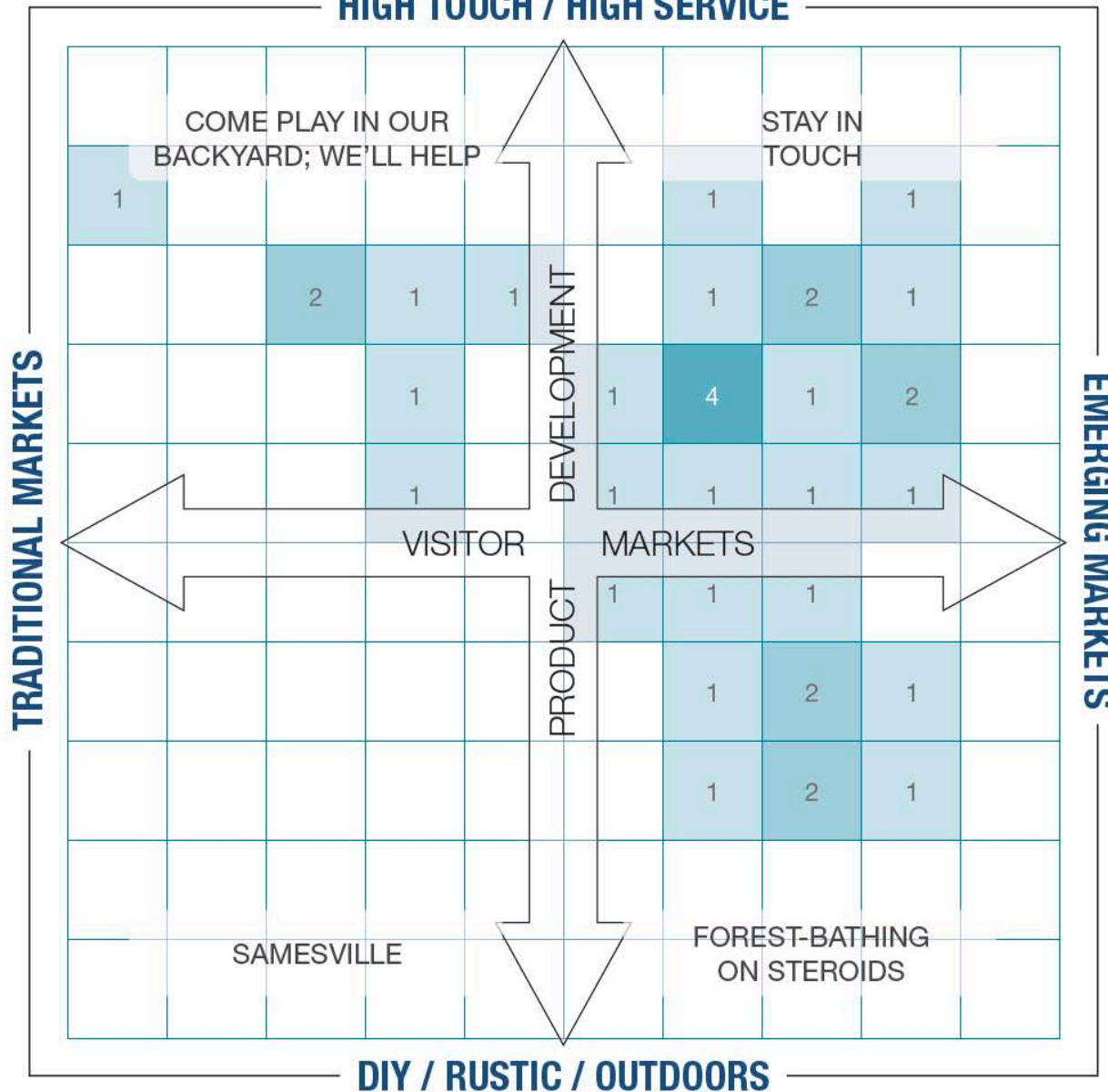
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BETHEL AREA

PREFERRED FUTURE – 2030

HIGH TOUCH / HIGH SERVICE



PREFERRED FUTURE PLAUSIBILITY MATRIX

This grid displays the plausibility level assigned by the workshop participants.

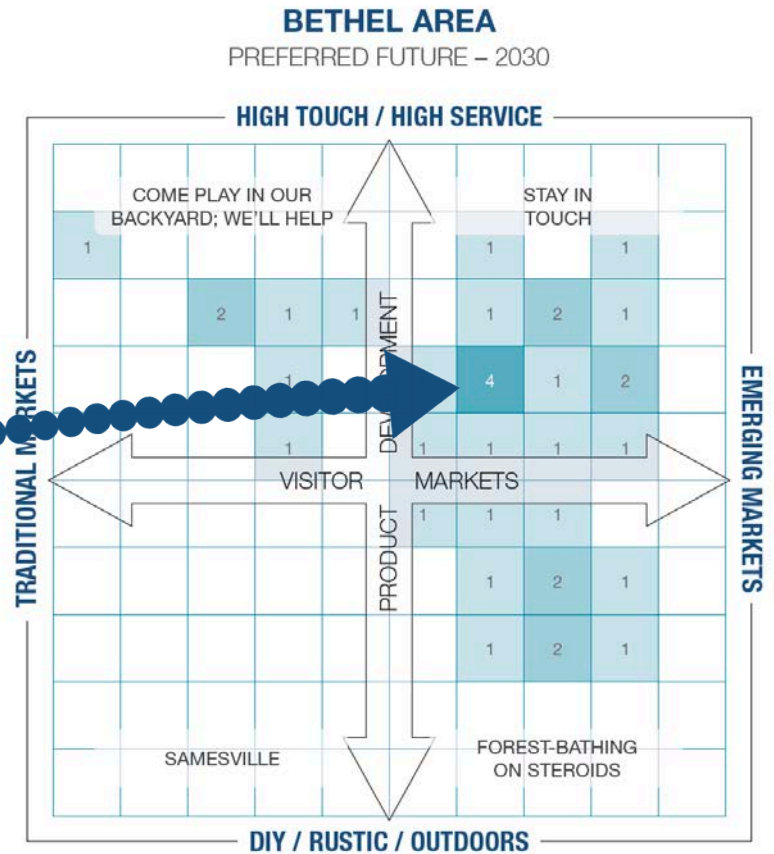
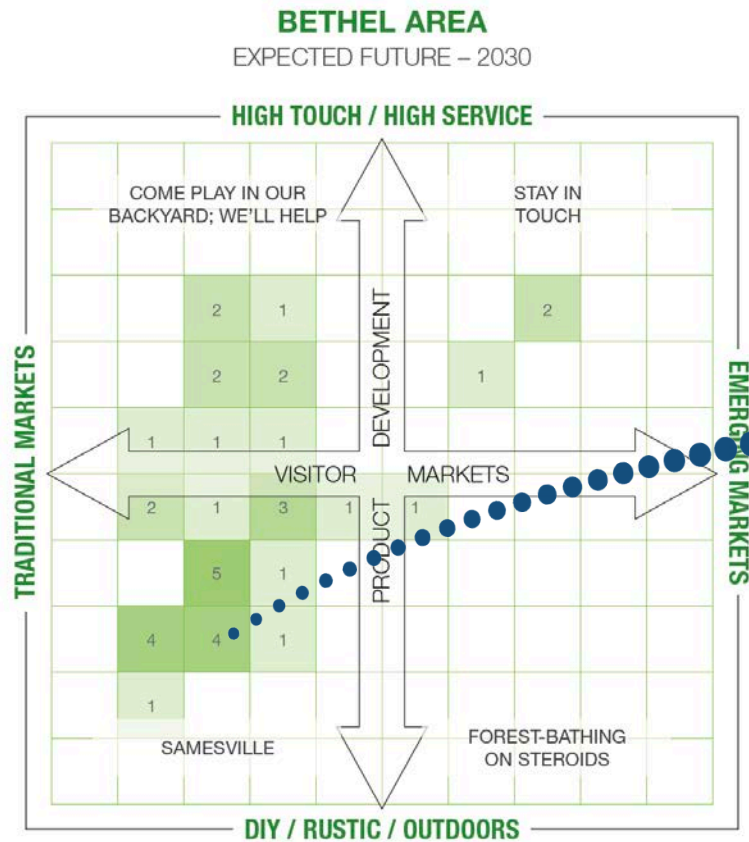
The darker the color, the greater the aggregate weighted plausibility score.

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Closing the gap



High Touch / High Service

Bethel Area 2030

Bethel Area CDA

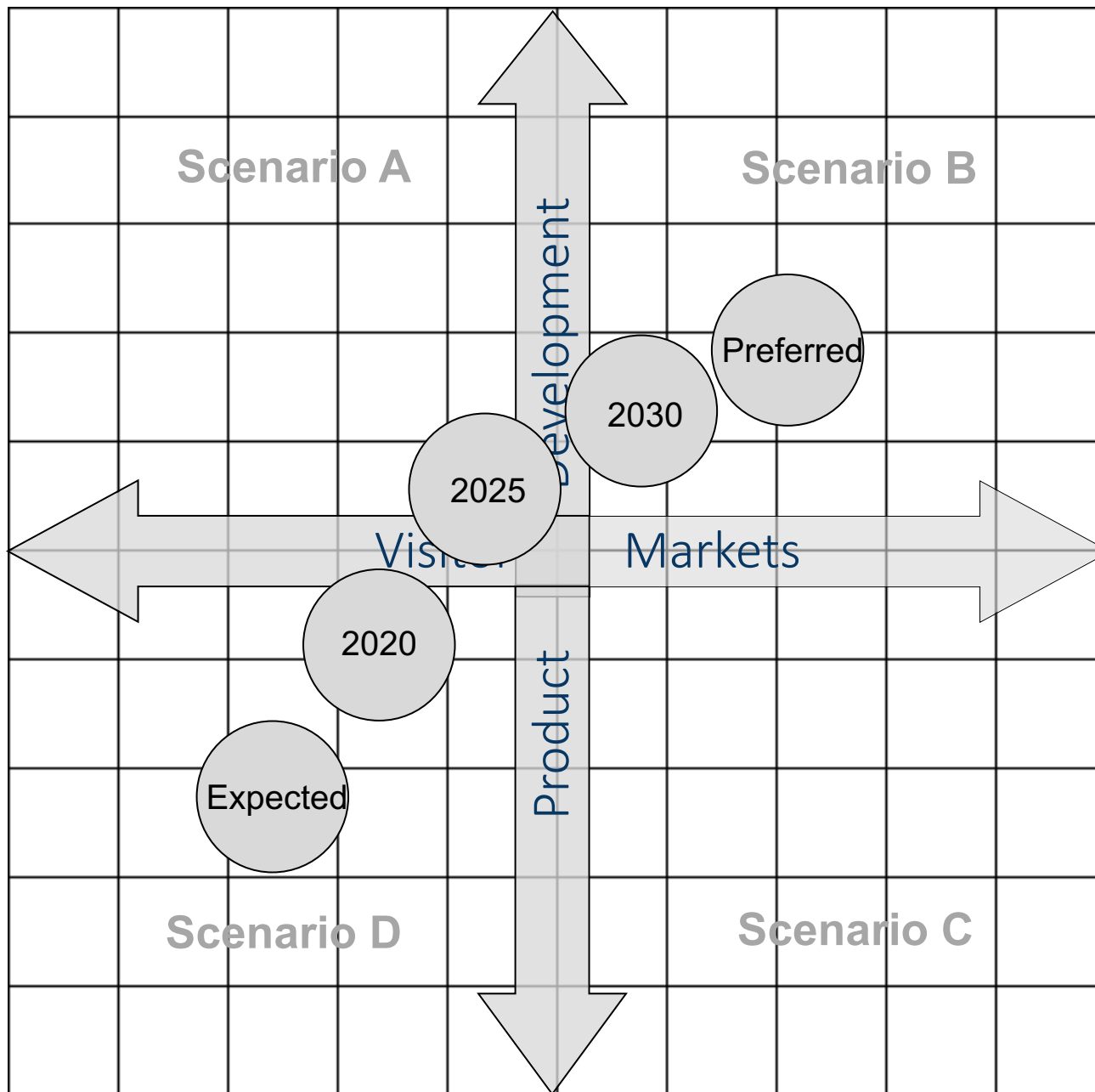
Trajectory

Instructions

- Where do you think you want to be in:
 - 2020
 - 2025
 - 2030
- Mark the year on the matrix

Traditional Markets

Emerging Markets



DIY / Rustic / Outdoors

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Reaching higher value emerging markets

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<p>What makes Bethel area most appealing to the potential emerging markets?</p>	<p>What is the compelling marketing narrative about the Bethel area destination?</p>
<ul style="list-style-type: none"> • Great outdoors with less crowds • Good infrastructure • 4 Season activities; rocks; minerals and meteorites • Authenticity • Intersect of landscape / scenery/ outdoor recreation / high quality amenities / lodging • Easy access to major markets • Commitment to healthy lifestyles in a mountain town 	<ul style="list-style-type: none"> • Everything in one place • 4 season destination that's down to earth and out of this world • Small town, unpretentious – perfect place to be temporary local • Thriving small town • Sustainability • We're the place you want to be; even if you haven't found us yet



Which higher-value emerging market segment(s) do you think have most potential?	How do we best reach the higher value emerging markets?
<ul style="list-style-type: none">• Balanced Achievers• Adventure Travel• Genuine originals• Hudson valley – Asian; Eastern Europe; UK• Attract 1st time – they will be back• Feel-good movement• Next gen balanced achievers• Mid-stream – mix of adventure, cultures, food	<ul style="list-style-type: none">• Local and regional collaboration• Strategic partnership with businesses• Collaboration – across the board• Packaged experiences• Extract more from existing visitors• Partnership and relationships• Product managers – targeted adventure travel companies• Concierge style companies



Creating High Touch / High Service Products suitable for the Bethel area



What type of products does Bethel area need, or can deliver on?

- Remote working – expand visitors to weekdays
- 3-day weekends
- Delivers the Maine experience
- ‘Go green’ – eco-tourism / eco-living
- More local product – food, farmers, art
- Outdoor and small-town experience and fun
- Adventure at any level
- Packaged itineraries

What would make the Bethel area product unique and appealing to emerging markets?

- Living like a local
- Authentic, with space yet close to attractions
- Easy packages
- Well rounded holistic experience with nature, art, food
- Need stronger main street experience
- Provide role model as a community – healthy living; green; lifestyle
- Community has unified vision and sustainable collaboration
- Need a village mentality
- Cultural mixed with recreational opportunity
- Sense of adventure
- Leverage Minerals and Gem museum



Developing Strategic Pillars



Summary of strategy and evolution questions

- Focus on collaboration across region, and especially townships
- Sustainability focus / unique eco-based
- Outdoor recreation focus – regional scale
- Coherent regional message – wayfinding
- Strategic partnerships and co-ordination – public / private



Bethel Area Tourism Strategic Pillars



Regional Collaboration, Convening, Communication and Leadership

IMPORTANCE: Improved access to capital; avoiding duplication of effort; paying more attention to how money is allocated; making information across region more accessible

**Strategic partnerships
– public/private**

**Collaboration
between towns**

Other Big Ideas

Four towns consciously develop 5 to 10-year plans

- Comprehensive economic plan officially adopted by each town (regional planning).
- Focus on necessary infrastructure – sewer, waste, broadband, parking, transportation.
- Identify local community leadership in each regional plan.

**Community
Calendar of
Events**

**Develop pool of
volunteers**

**Increase
mentoring
opportunities**

**Cultivate a welcoming &
inclusive community**

Identify what networks and relationships already exist.

- Create quarterly 'Live Calendar Meeting'
- Short and long-term "There's nothing to do in Roanoke" series of publications
- Broadcast planning meetings to increase buy in.

**Regional Director
of tourism**

**Clearinghouse of
information**

- Transparency across region
- Educating region on benefits of new tourism initiatives

Leadership development

Host facilitated local

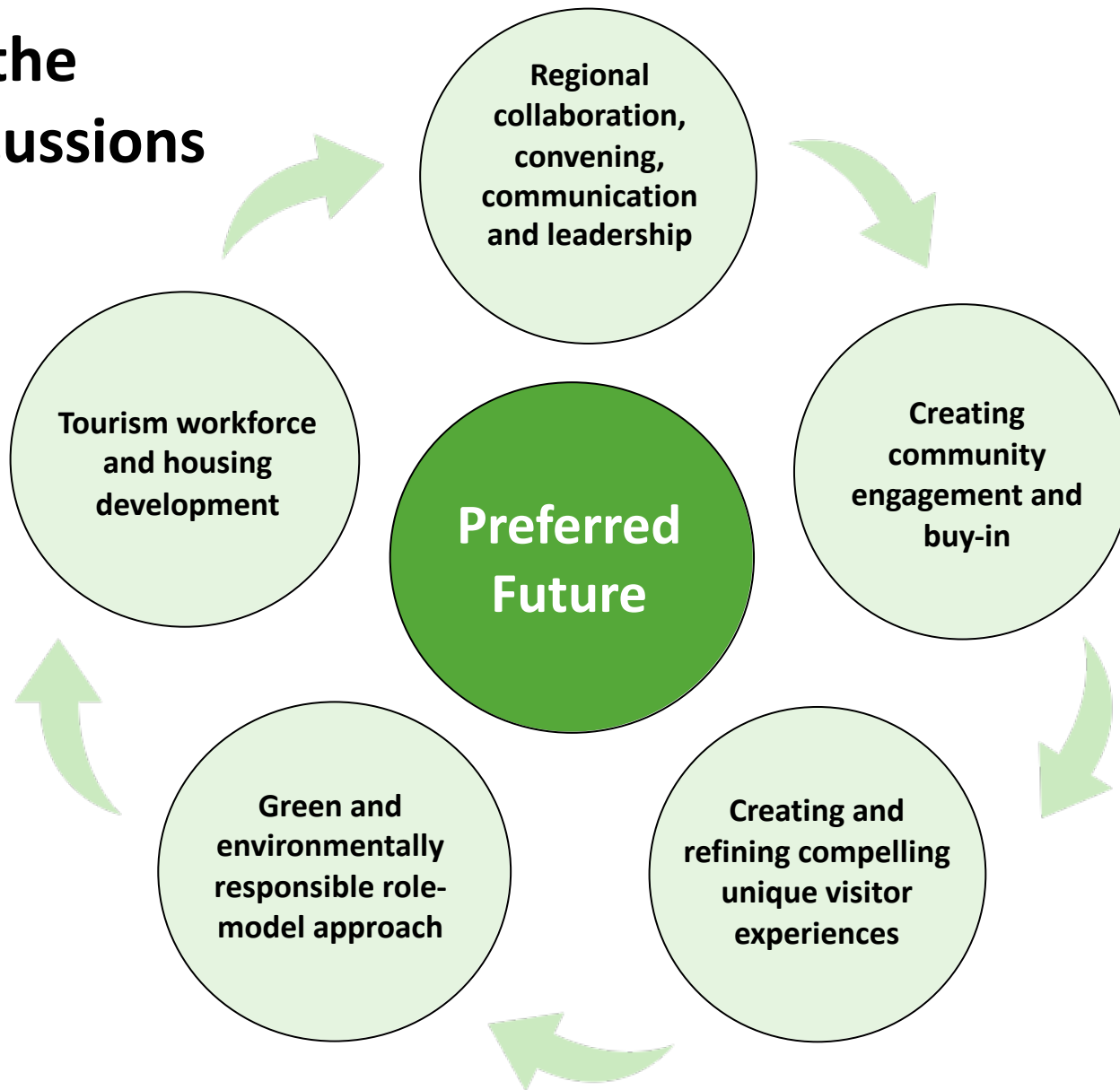
Need region-wide:

Contribute your ideas and priorities



- Review each Pillar, and add any big ideas
- Select your highest priority items (max 5)

Join the Pillar Discussions



Next Steps and Closing Comments

