

St. John Valley ByWay Market Analysis, Target Market and Opportunities

The Maine Office of Tourism (MOT) conducts annual visitor research to provide information on tourism activity in Maine and to explore the motivations of visitors. The following is a summary report on the findings from that research for the state of Maine, followed by Aroostook County. ¹

Visitors to Maine

In 2012-2013 Maine entertained close to 40 million visitors – over 20 million overnight, and 18 million day trip visitors. More than half came to Maine for leisure visits, while retail, food and lodging made up the bulk of spending by overnight visitors.

When planning a visit to Maine, decision time is generally within three weeks of arriving to Maine. People under the age of 35 are more likely to turn to friends, relatives and coworkers for advice on trip planning, and Canadians (74%) are more likely than U.S. travelers (64%) to use the Internet in planning an overnight trip to Maine. Online search engines, regional websites, and VisitMaine.com are the most popular choices for online trip planning. Over one-third of visitors still order a hard copy of the *Maine Invites You* destination guide. More visitors are conducting research on activities using mobile devices while in Maine. This presents an opportunity for them to modify their itinerary (this trend applies more to first time visitors than repeats, those families with children, and day trippers).

Repeat visitors are more likely than first time visitors to not consider another destination aside from Maine (i.e., if they come once it will be easier to encourage their return). In 2011, the number of first-time visitors declined, but those who came to visit friends and relatives experienced a slight increase in travel party size. There was also a decline in the use of free campground usage, while other types of unpaid accommodations remained stable. Personal vehicle is still the predominant method of traveling to and within Maine. Travelers with children and first time visitors use state visitors' centers most often.

Visitors without children were more likely to come to Maine for friends and relatives, while Canadians were more likely to come for shopping. The states of Massachusetts and New York continue to comprise the majority of overnight visitors, though the number of visitors from Pennsylvania is on the rise.

¹ Source: the Maine Office of Tourism Visitor Tracking Research. Statistical material in this section represents a combination of 2011-2012 data.

- Kittery and Houlton visitor centers are the most visited in the state for day visitors;
- There is a general increase of day visitors to Maine than in the past;
- New Brunswick is the 4th leading location from where day visitors come;
- Touring is the 3rd most popular activity for leisure day visitors; cultural experience is last;
- Day visitors rate Maine high on overall experience and friendliness of the people.

Visitors to Aroostook County

In 2011, Aroostook County was the least popular of the eight Maine tourism regions as a place to visit overnight, but saw a significant year-over-year (YOY) increase from 2010.² This presents both a challenge and an opportunity. Day visits trended similarly, except there was no YOY increase. For overnight visitors, the primary purpose of the trip was for outdoor recreation (#1), and touring (#2); cultural experiences were rated last.

Effort must be made to increase the levels of promotion of the region in order to gain net visitors. Visitors were surveyed on 14 other trip activities in addition to the primary purpose of the trip. The most popular responses for overnight visits included sightseeing (#5), pleasure drives (#7), searching for local cuisine/hotspots (#8), and historic sites/museums (#12). These are activities that can be promoted along the St. John Valley Cultural Byway.

Overnight visitors to Aroostook County tend to be relatively young and less affluent than those who visit other parts of the state, while day leisure visitors tend to be older, male and married. New Brunswick supplied 21% of all overnight (and day trip) visitors in 2011, while 15% came from New York; 14% came from Pennsylvania and 13% from Massachusetts. Overnight visitors reported outdoor recreation and touring as the primary purpose for their trip; activities were similar to Maine as a whole with outdoor recreation at 63%, and shopping at 56%.

A high number of overnight visitors listed searching for local cuisine and dining hot spots (24%); enjoying mountain views (21%); and pleasure driving (20%), as popular overnight trip activities. The top three outdoor activities were hiking/climbing (25%); going to the beach (17%); and lake, stream or river fishing (14%). Presque Isle (26%) continued to be the top place visited, but Madawaska (22%), Eagle Lake (20%), Fort Kent (19%), and Allagash (16%) were close behind, indicating that a healthy share of overnight visits occur in the St. John Valley.

² Due to to the small available sample size of leisure visitors to the region, results for 2011 and 2012 have been combined. Statistics are based on 63 overnight visitors and 74 day visitors. For directional purposes only.

In terms of day visitors, it may be difficult to take advantage of the large number of general shoppers (70%) that visit Aroostook County daily as 56% of them visit Houlton. However 69% of them are from New Brunswick and could possibly have family ties to, or an interest in, byway activities in the St. John Valley. This would generally require making a separate trip since most of the prime shopping activity occurs in Presque Isle and Houlton. There may be an opportunity to focus on outdoor enthusiasts to experience the lakes and rivers of the St. John Valley. Aside from shopping, golfing was the most popular activity for day visitors in Aroostook County, followed by going to the beach at 5%; and boating activities third at 4%. Since the St. John Valley has numerous golf courses, lakes and rivers, efforts could be made to develop strategies to link those activities to the byway.

Fort Kent and Madawaska were the only byway communities visited by leisure day visitors to Aroostook County. Of the two, Madawaska had a greater number of visitors than Fort Kent (Houlton was the top town visited, while Presque Isle was a distant second at 41%). Houlton is home to the second busiest visitor information center in the state, and is staffed by the Maine Tourism Association. Efforts can be made to utilize this valuable resource more fully in order to raise awareness of opportunities for day and overnight visitors seeking activities other than shopping, and maximize audience awareness of byway activities and experiences.

Northern Maine Tourism Action Plan 2011-2016

In 2011, the Northern Maine Development Commission (NMDC) and Aroostook County Tourism (ACT) released the Northern Maine Tourism Action Plan 2011-2016.³ The plan was shaped through extensive community engagement with sector businesses and nonprofits, committee participation, and general research. The plan includes all of the towns, townships and communities within Aroostook County of northern Maine. To develop a strong and effective marketing component of the St. John Valley Byway, it will be important to align byway-specific objectives with broader regional strategies wherever possible. The following points from the Northern Maine Tourism Action Plan are relevant to the byway:

Partnerships and Networks

- Become more global, not so territorial and insular
- Establish more formal and sustained relationships with businesses and groups
- Continue, nurture and maintain existing collaborative relationships
- Explore how to leverage other infrastructures and proximity to Canada
- Build stronger connections to other agencies for resources and support
- Expand beyond existing partnerships to include colleges and universities

³ Download the plan at: www.nmdc.org/Development/NM_Tourism_Action_Plan_2011-2016.pdf

- Ensure that more voices are part of the solution

Sector Effectiveness

- Sustained and effective training for customer service and hospitality for business and nonprofits
- Annual regional tourism summits
- Cooperative marketing and incentive packaging
- Link related businesses/nonprofits by creating trails
- Build upon tourism opportunities and related studies
- Gain better grasp of target markets with current research and assessment

Visitor Market

- Within northern Maine and rest of state
- Canadian Maritimes and Québec
- Focus more on Europe
- Attract more group and motor coach bus tours
- Cultural tourist, independent outdoors tourist
- Family-oriented activities based around natural resources

Organizational and Infrastructure

- Conduct internal assessment on structure
- Be attentive to nurturing leadership
- Promote ACT as an entity more effectively; gain better and more consistent visibility
- Establish additional reliable sources of revenue
- Research other models of tourism development
- Revolving loan fund to help finance tourism sector
- Higher level of data collection and information on tourism trends, models, etc.
- Assessment of the regional tourism sector: inventory and stats
- More formalized network system between ACT and chambers and other organizations

Creative Economy and Market Research

In 2010, the Margaret Chase Smith Policy Center of the University of Maine released a report after two years of extensive research on the creative economy of the St. John Valley.⁴ Through market intercept surveys, researchers were able to identify the kinds of visitors coming to the region for cultural and outdoor recreation events. The annual events studied included the Acadian Festival; Can-Am Crown International Sled Dog

⁴ *St. John Valley Creative Economy Project: Strengthening Our Communities and Economy Through Culture and Place*, Sheila Jans et al, Margaret Chase Smith Policy Center, 2010 – available at www.umfk.edu/economy

Race; North American Cup and National Biathlon Championship, and the Tour de la Vallée cycling race.

It was found that the majority of people attending these events were local residents from the St. John Valley and from across the border in New Brunswick, with fewer participants from other parts of Aroostook County, Maine, New England, and Québec. On average, people who attended these events had higher than average income levels and educational attainment, but were not as diverse in age.

There were high levels of satisfaction expressed about the friendly and helpful nature of the local people, the beauty of the landscape, and the overall experience of the region. However, there were low levels of satisfaction for the quality of accommodations and dining. Visitors were attracted to the area because of the uniqueness of the events, quality of the cultural and historical experience, and for visiting friends and relatives.

With the exception of the lack of choice in lodging and dining, most of the identified weaknesses also present opportunities. For example, in an effort to increase visitors to the region from within the state, strategies should be developed that market these and other cultural events to the rest of Maine, with a particular focus on French-speaking communities. A survey response from the Acadian Festival indicated that in staging events, location and proximity are important considerations, particularly if public transportation is not available and parking is difficult to find. “Walkability” should be a design consideration whenever new events are created or existing events are bundled.

The surveys revealed the opportunity to develop “shoulder” trip activities that would appeal to well-educated and relatively affluent visitors. Such events would favor cultural “experiential” activities, or history & heritage tourism, which have both grown in interest in the New England region over the last decade, and for which the St. John Valley has ample intrinsic resources.

The Can-Am Crown and the Biathlon events drew a younger and somewhat less affluent audience, opening the door to attracting the older and higher income visitor. Conversely, the Acadian Festival with its higher percentage of 44-year old+ attendees, has an opportunity to develop activities appealing to a younger audience. Shoulder activities developed as part of a strategic marketing program can inspire these visitors to come earlier and stay longer.

Some of these strategies may apply to the cycling audience for the summer’s Tour de la Vallée. Survey data indicate that unlike the Acadian Festival and Can-Am Crown International, these two events were the primary reason that visitors came to the area. Marketing strategies will need to respond to that targeted audience. There is an opportunity to develop and sell more locally crafted goods and area-specific memorabilia celebrating the Valley and its treasures. This may be a way to help offset

some of the cost of offering cultural experiences at the museums and historical sites during these events, particularly the two winter attractions.

Creating additional lodging and dining choices is difficult to do unless enough extra volume can be generated through successful tourism activities. To some degree, successful tourism activity is made more difficult without desirable accommodations. It is worth the effort to incrementally create additional bed & breakfasts or small scale lodging to reduce the outlay necessary and increase the return on investment. Additional research at future events may be able to better determine what types of accommodations visitors are looking for, so that the right type and scale of lodging can be developed with lower risk.

A creative marketing campaign will need to combat the fact that Aroostook County is the least visited tourism region in the state. It must recognize that the bulk of the visitors to this region are and will continue to be Canadian, and therefore things such as the Western Hemisphere Travel Initiative policies and regulations, bilingual signage, and currency exchange will remain priorities in making a better visitor experience.

Target Market and Opportunities

The St. John Valley Cultural Byway is firmly rooted in the region's culture and scenic landscape. It offers an experiential opportunity to the visitor. The byway's mission is to:

“celebrate the region’s distinct international blend of French heritage, care for our cultural and natural assets, foster tourism opportunities to attract visitors from around the world, and enrich the quality of life for residents.”

The marketing message will focus on this mission. Four primary markets have been identified for the byway:

1. Regional residents and expatriots
2. Aroostook County and Maine (especially French heritage communities)
3. New England, expatriot states (especially Louisiana)
4. Canada (especially Québec and Atlantic Canada) and other French-speaking countries

Undoubtedly, the cultural enthusiast will be attracted to the byway. The cultural tourist will benefit the region's economy significantly since statistically, they are better educated, more affluent, tend to be older, and spend an average of \$62/day more than other travelers.⁵ Families, nature lovers, touring enthusiasts, and senior travelers are

⁵ Source: Maine Office of Tourism

amongst target markets. Ultimately, a traveler interested in an atypical, intimate, and authentic experience of a people and place will be attracted to the byway.

Though the byway is open year-round, it functions at a higher level from June until October. It is during these months that the visitor can engage more fully with the region. Essentially, things are more accessible. Just the same, winter months also present possibilities by taking advantage of skiing, snowmobiling, ice-fishing, and events like the Can-Am Sled Dog Races, all of which attract hundreds of visitors from within and outside of the region.

‘Why would anyone come here?’ is a valid question to ask. Creating strategic messages to invite visitors to the byway opens many possibilities and opportunities for the region. Unfortunately, being considered “remote and isolated,” “too far from anywhere,” or well off the beaten track, can discourage strategic planning for tourism development. The chronic lack of resources and infrastructure to champion the kind of work required has historically derailed efforts. All too often, people in the Valley look southward to the New England coast line for its market. Though that approach may align with the state’s strategy (and will still be considered in byway marketing), there are many opportunities awaiting the St. John Valley as a result of its offer and geographic location.

Local and State – The sense of identity and place and the international nature of the region, resonates strongly for people who live here as well as family members who live in other parts of the United States and Canada. Moreover, residents of the Valley have an interest in one another. From one side of the region to the next, including the larger territory extending south of the region, there are strong family connections, a dedicated interest in genealogy, and a desire to become more acquainted with one another. Though the population of the region has diminished significantly in the past 50 years, a large market for the byway includes those people who either used to live in the Valley or have long-standing family ties here.

The region is seeing an increase in senior activities, such as a senior college, tours, and exchanges. The byway can capitalize on this older generation of cultural enthusiasts, especially those living in the region. Additionally, there are already established destinations within the region. For example, Madawaska is one of the four corners of the United States, a notion that attracts a loyal and enthusiastic following from residents and visitors from the rest of the U.S. and around the world. The Allagash Wilderness Waterway and Northern Forest Canoe Trail attract local residents as well as people from around the world.

National – As a result of being part of a state and national byway system, the St. John Valley Cultural Byway will gain visibility. An important target market within the United

States are people of French descent (Acadian) in Louisiana. This also applies to communities in Maine (mostly French-Canadian), the Canadian Maritime provinces, and Québec. However, Louisiana is particularly connected to the St. John Valley through a direct lineage of Acadians and have sustained a strong relationship through family reunions and the creation of sister towns. The *Congrès mondiale acadien* has also played a critical role in strengthening that relationship further.

Based on statistical research and assessments, the byway can take advantage of an already healthy visitorship of people from within the nation. Each summer there is a steady stream of people from the New England states, including Arizona, Florida, and California, who used to live in the region or have family ties here. They come to reconnect with family, for school reunions, and various events. Communities are linked through the museums and cultural groups, historic sites, churches and cemeteries and traditional farms (providing excellent niche tour opportunities) as well as through events such as the Tour de la Vallée, a cycling competition which includes several communities and outdoor recreational experiences.

Cross-border and international – The cross-border experience provides multiple opportunities. These opportunities include markets directly across the international border in New Brunswick and Québec. Because of the region’s shared history, French heritage and language, the byway can take advantage of the region’s Canadian neighbors as well as a European market of French-speaking countries. The byway’s wayside exhibits are bilingual, many tourism-related publications include French (like *Voici the Valley Audio Story*), and services are available in French.

Entities such as Centre Français de la Vallée St-Jean and the Acadian Archives at the University of Maine at Fort Kent are destinations for people from Canada (and from around the world) doing scholarly research or wanting to know more about the heritage of the region. The byway can also leverage the outcomes of the *Congrès mondiale acadien*, which strengthened old friendships and forged new alliances with Acadian and French-speaking people.

Additionally, the TransCanada Highway, only a mile from the Maine border, is a major conduit for thousands of travelers from Canada and around the world. The location of the St. John Valley is strategically situated between what is considered central Canada (Ontario and Québec) and eastern Canada (New Brunswick, Nova Scotia, Prince Edward Island, and Newfoundland/Labrador). There is a large market of Canadians and visitors to Canada driving by the St. John Valley who can experience the distinct culture and story of this little corner of the United States.

Additionally, the byway can capitalize on the international biathlon and Olympic-level skiing competitions that take place at the Maine Winter Sports Center in Fort Kent (10th Mountain) and an hour away in Presque Isle. These events are especially appealing to an

existing fan base that travels the circuit of North American events. The biathlon is a popular sport in Europe, especially in the northern countries.

Marketing the Byway

The St. John Valley Cultural Byway is the destination. Everything along the byway is the experience. Promoting and marketing the byway will be incremental and highly collaborative; it will be a team effort.

Efforts to attract the byway's target market will include collaboration with entities throughout the region and county who already attract visitors to the area (e.g., North Maine Woods, Aroostook State Park, Allagash Wilderness Waterway, Maine Winter Sports). This also includes connecting with the regional chambers of commerce and linking with the ongoing promotional efforts of Aroostook County Tourism. The byway goals identify the importance of creating a solid and authentic message and branding. Concentrated focus will be on an online presence, print material, and affinity marketing with regional organizations (stakeholders of the byway), and events.

As outlined in the byway goals, every effort will be made for cross-sector collaboration and supporting experiences for niche audiences, such as touring circuits of museums, farms, historic churches and cemeteries. The byway management committee will be responsible for building strong networks and collaborations throughout the region and beyond. One of the most important entities that will be key to the successful promotional efforts of the byway is Aroostook County Tourism.

Aroostook County Tourism

Aroostook County Tourism (ACT) is a standing committee of the Northern Maine Development Commission (NMDC). Its responsibility is to support tourism in Aroostook County, Maine's northern county, by promoting the county's greatest assets, activities and services on its website, through social media, tourism summits, and trade shows.⁶

ACT recognizes the significance of the St. John Valley Cultural Byway, not only for the Valley, but also for the entire county and state. The byway is located in a distinct geography with a connecting capacity for all communities within the region as well as to other parts of Aroostook County. This sets the stage for multiple opportunities. ACT will implement the following strategies to support and market the byway:

- inclusion in ACT's marketing plans and promotional print materials;

⁶ For more information on ACT, visit www.visitaroostook.com

- ensure byway brochures are in Maine Tourism Visitor Centers throughout the state;
- frequently post information about the byway on social media sites;
- inclusion as a separate destination on ACT's website (visitaroostook.com);
- directly link off of the tourism page of NMDC's website (nmdc.org);
- appoint a member of ACT's committee to be attentive to, and report on byway matters;
- access and make available tourism research that will benefit the byway;
- provide visibility of the byway at trade and travel shows regularly attended by ACT.

Local Area Chambers of Commerce

The Chambers of Commerce in the Saint John Valley (SJV) region are of primary importance to promoting the Cultural Byway in-region and to those inquiring about their community for business, tourism or living purposes. They must be aware of the cultural history of the region and how that underpins the Byway designation and purpose. The SJV Cultural Byway should be incorporated into their community information materials as a way of differentiating and broadening the community's appeal. Finally, the Chambers must be one of the key supporters of the sustainability of the SJV Cultural Byway efforts – both financially and communally.

An online presence is recognized as a key strategy for marketing since it is the most widely used trip planning source for overnight trips to Maine and well as an online resource for potential visitors to select destinations. ACT's commitment to a strong social media presence aligns with the five-year marketing plan of the Maine Office of Tourism (MOT). Released in March, 2014, the plan also targets "experiential travel" with an increase in social, cultural heritage, and environmental awareness, as well as trends toward matching a visitor's personal identity and values. Clearly, the byway complements the MOT's strategy. Additionally, ACT will be attentive to granting opportunities that will support byway efforts. For example, ACT is willing to provide technical expertise and resource information for the MOT's "Special Projects" program and or other funding opportunities which will promote the byway as a destination experience in Aroostook County. Further, the Aroostook County Tourism website is linked directly to the Maine State Tourism site and therefor doing so will make it possible to market the the ByWay statewide and the nation.