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Consumer Support for a Maine Woods Tourism Quality Label

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Consumer Support for a Maine Woods Tourism Quality Label

by David Vail

Harold Daniel



David Vail and Harold Daniel report findings of a survey of North American vacationers. The survey assessed the strength of interest in quality-labeled Maine vacation experiences and tested consumer willingness to pay a price premium for certified tour “products.” The survey revealed that nearly four out of ten leisure travelers are responsive to the benefits promised by quality-labeled vacation experiences. The authors also describe steps communities, businesses, and state tourism leaders can take toward developing a Maine Woods quality label. 🦅

TOURISM QUALITY LABELS
GAIN MOMENTUM

Tourism quality labels, such as “Ecotourism Australia” and Sweden’s “Nature’s Best,” have been introduced in a growing number of affluent nations (see Vail 2004). The recent launch of “Adventure Green Alaska,” “Travel Green Wisconsin,” and “New Hampshire Grand” indicates that quality labeling is also catching on in U.S. tourism. Here in Maine, the Department of Environmental Protection’s “Environmental Leader” program has certified the environmental practices of more than 100 lodgings and restaurants, and the Maine Woods Consortium¹ has initiated an exploratory project to evaluate the market potential of a distinctive quality label for Maine Woods tourist experiences.

This article reports the findings of a survey of North American consumers commissioned by the Maine Woods Consortium, with additional financial support from the Maine Office of Tourism. The authors designed and carried out this survey in the fall of 2011. Two of its main objectives were to assess the strength of consumers’ interest in quality-labeled Maine vacation experiences and to test their willingness to pay a price premium for certified tour “products.” Survey Sampling International designed a representative sample of U.S. and Canadian households with recent travel experience and administered the online questionnaire. Since Maine is primarily a “drive to” tourist destination, households residing within Maine’s “drive market”—the Northeast and eastern Canadian provinces—were oversampled.

As the tourism quality labels listed earlier convey, most certification programs put a premium on environmental stewardship. Our survey broadens the focus to gauge the strength of consumers’ preferences for five distinct aspects of a certified vacation experience: quality of lodging; quality of dining; quality of recreational activities; outstanding environmental practices; and local community contributions (for instance hiring and training local employees and purchasing local farm products). In our analysis, we call the first three aspects *self-interested certification* and the latter two aspects *altruistic certification*.

TABLE 1: **Proportion of Visitors Who View Maine Favorably, Compared to Competing New England Destinations**

	2008 Maine Visitors	Non-returning Past Visitors	Prospective Visitors
	----- % -----		
Customer service quality	68	41	23
Value for the money	62	32	22
Variety of activities	64	41	22
Overall experience quality	80	45	23

*Quality-centered Maine Woods Tourism:
Challenge and Opportunity*

The Maine Office of Tourism’s motto—“There’s More to Maine”—reminds prospective visitors that the state offers much more than the coast’s iconic lighthouses, lobster, and L.L. Bean. But Maine, and especially its interior regions, must address a quality challenge as it appeals to 21st century markets. This is suggested by a 2008 tracking survey of overnight leisure visitors to various Maine tourism regions. A sizable majority of coastal visitors answered affirmatively when asked if they would “probably” or “definitely” recommend Maine destinations to others. However, for Maine’s four interior tourism regions positive responses ranged from a low of 28 percent for Aroostook to a high of just 42 percent for the Maine Highlands and the Lakes and Mountains region (DPA 2009).

For the state as a whole, a 2008 prospect survey of potential visitors reveals a big gap in perceptions of Maine vacation experiences. Respondents were asked to compare several aspects of Maine vacations with other New England destinations. The responses of current overnight visitors were compared with past Maine visitors who chose not to return and with “prospects” who had considered but not chosen Maine as a destination. Table 1 shows that most actual 2008 Maine visitors hold the state in high repute relative to nearby destinations. (The majority of them have made multiple repeat visits.) However, those who have visited Maine in the past but not returned hold a dimmer view, and those who have considered Maine but not vacationed here have a distinctly negative view (DPA 2009).

These findings suggest that the Maine Woods region faces three sizable challenges in its quest to attract more first-time tourists and bring back more

repeat visitors: upgrading product quality, enhancing destination appeal, and effectively branding and promoting top-quality products and destinations. This perception of the challenge was highlighted at the Maine Woods Consortium's 2012 stakeholder retreat, "Profiting from Quality Maine Woods Vacation Experiences," where 70 participants reached nearly universal agreement that outstanding visitor experiences—not cheap ones—are the key to tourism growth, profitability, and job quality in rural Maine. The (former) State Planning Office has gone so far as to state that, "The goal...is to provide Maine visitors with opportunities to experience the state's *world class* natural, historical, and cultural resources" (Maine SPO 2005, emphasis added). Achieving true world-class status is a tall order for interior Maine, but it is a worthy and probably a necessary aspiration.

The Maine Woods Consortium (MWC) has responded to the challenge of product quality with three initiatives. The first and most advanced is the *Maine Woods Tourism Training Initiative* (MWTTI), which has offered customer service and other instruction to 550 frontline employees and managers representing more than 300 tourism businesses since 2010. The MWTTI has also supported development of *WelcomeMe*, an online tool for customer service training, by the Maine Business School at the University of Maine. It is available to all Maine hospitality businesses and their employees. The second initiative is *Maine Woods Discovery*, a partnership among five highly regarded outdoor-recreation specialists who create and cooperatively promote distinctive seasonal vacation packages. (Current members include the Appalachian Mountain Club, Maine Huts and Trails, the New England Outdoor Center, Northern Outdoors, and the Northern Forest Canoe Trail. MWD's goal is to reach 20 members by 2015. See www.mainewoodsdiscovery.org)

The consortium's third initiative—the focus of this article—explores the potential of a certified Maine Woods quality label to increase the profitability of participating businesses while advancing MWC's "triple bottom line" mission of economic, community, and environmental sustainability. The exploration began in 2010 and 2011 with interviews with key informants and sessions with focus groups to gauge stakeholders'

views about a Maine Woods tourism quality label. Participants expressed diverse opinions on several core issues, such as what types of business should be eligible for certification, how rigorous certification standards should be, how the certification process could be financed, what technical assistance should be provided applicants, and the shape of a potential branding and marketing strategy. Overall responses to a possible quality label initiative ranged from skeptical to enthusiastic. A widely expressed concern and a prime motivation for our consumer survey was uncertainty about the market advantage and bottom-line payoff of a Maine Woods quality label. How big is the potential niche market? Can certified quality attract new customers, induce greater spending, and increase repeat visits? Can certified businesses charge a price premium without losing many customers?

To begin answering those questions, MWC commissioned a review of experience with certified nature tourism in two U.S. states (Alaska and Wisconsin) and four developed nations (Australia, New Zealand, Norway, and Sweden). A literature review suggests that, for a substantial minority of travelers worldwide, certified quality labels have become an important criterion in choosing places to visit and businesses to patronize (Vail 2011); however, quality labels seldom appear to be decisive factors in vacation decisions. In particular, "responsible" environmental practices and community contributions are typically trumped by businesses' reputation for outstanding product quality. As one analyst concludes, "consumer demand for responsible tourism [is] growing; but largely passive" (Chafe 2005: 3). Several surveys also indicate that many travelers are willing to pay a price premium for certified products, but there have been few real-world pricing experiments to corroborate this survey finding. The survey discussed in this article was designed to test the literature review's fairly optimistic conclusions.

RESEARCH METHODS AND SAMPLE EVALUATION

The study is based on an online survey of 621 North American consumers selected from Survey Sampling International's "Survey Spot Leisure Travel"

email panel. Respondents were first asked to rate the importance of 22 vacation attributes in their travel decisions. These included the five dimensions of certification mentioned above: dining quality, lodging quality, quality of recreation experiences, environmental practices, and contributions to destination communities. Next, respondents expressed their level of interest in eight tour “concepts,” including six current *Maine Woods Discovery* vacation packages and two hypothetical packages with a Downeast focus. They were then asked to identify their favorite vacation package and express their willingness or unwillingness to pay a price premium if the package were certified across the five dimensions. Each respondent was randomly exposed to one of five price premiums, ranging from five to 25 percent. They next rated the strength of their preferences for 25 additional vacation features. Finally, they submitted demographic information (i.e., age, education, income) and described their actual leisure travel practices.

We have drawn inferences from the survey data using several standard empirical techniques. We used cross tabulation to identify relationships between pairs of variables and analysis of variance and Chi Square tests to test the statistical significance of relationships and assess the robustness of findings. Interpretation is aided by the use of factor analysis, a standard technique for exploring intercorrelation between variables. Cluster analysis is employed to identify respondent groups that reflect market segments in the population.²

We compare the survey sample with the U.S. and Canadian populations, based on census data, and with the demographic characteristics of Maine’s actual overnight visitors. As mentioned, respondents living within comfortable driving distance (i.e., Maine’s drive market) were oversampled. This weights the sample toward the northeastern U.S. and eastern Canada where 46 percent of sample households reside, compared to their 18 percent share of all North Americans. This geographic concentration also results in a slightly older sample: 34.8 percent are 55 years or older, compared to 32.7 percent of all North Americans.

For reasons that were not intended and are not clear, the sample population exhibits lower median household income than the U.S. and Canadian populations: roughly \$45,000 compared to nearly \$50,000 for

the census population. As Table 2 also shows, a substantially smaller proportion of the sample have incomes exceeding \$100,000. The sample population also has significantly lower incomes than the Maine Woods’ actual overnight visitors. Davidson Peterson Associates’ most recent visitor survey (2010) indicates that 71 percent of overnight visitors had incomes above \$50,000 (DPA 2012).

TABLE 2: **Household Income**

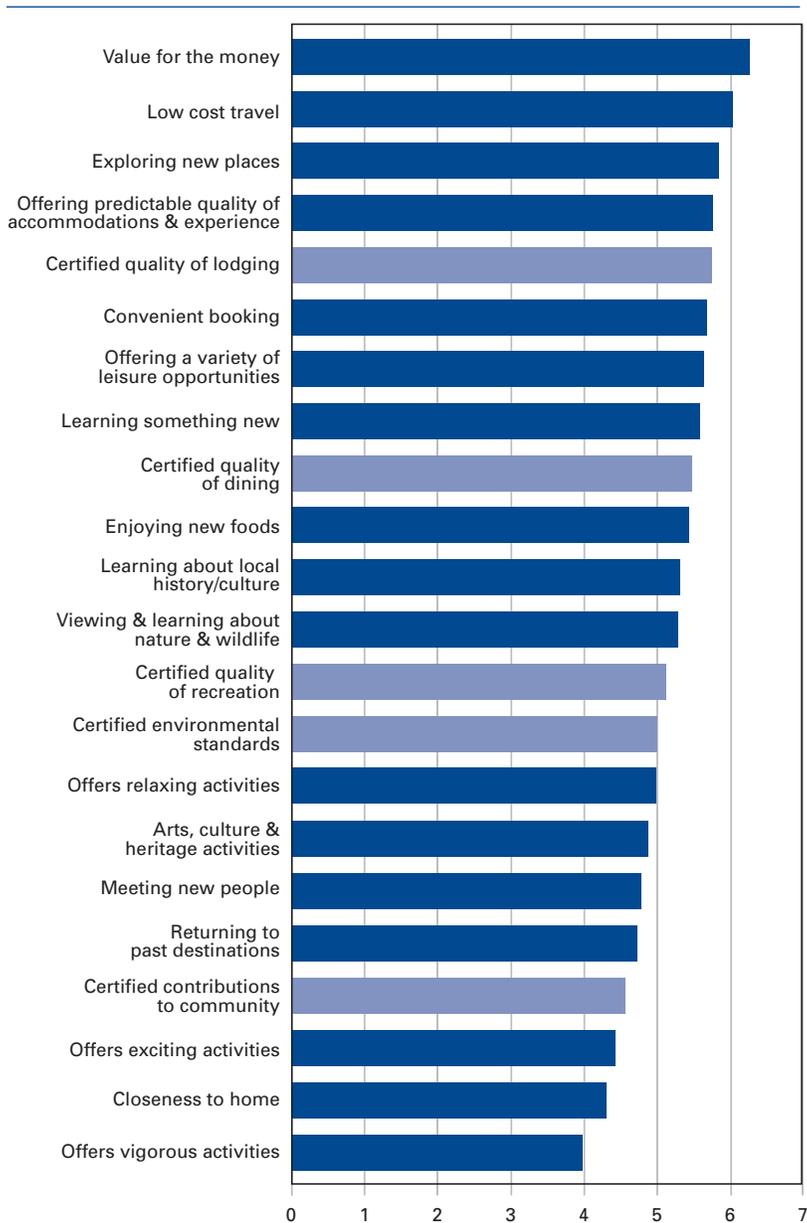
	U.S. and Canadian Census	Sample
Under \$50k	49.1%	58.6%
\$50k - 100k	30.4%	30.7%
Over \$100k	20.6%	10.0%

Given income disparities between our sample of leisure travelers, the household incomes reported in the U.S. and Canadian censuses, and the incomes of Maine’s actual overnight visitors, we reanalyzed the survey responses twice, weighting the data to reflect the census income distribution and then to reflect Maine’s actual visitors. In both cases, the differences between weighted and unweighted analyses, particularly in ratings of certification importance and willingness to pay a price premium, were small. Hence, in this article we summarize the unweighted analysis, which is less complex and easier to communicate.

A PRELIMINARY EXERCISE: IDENTIFYING MARKET SEGMENTS

Survey respondents were asked to rate the importance of 22 vacation features. This provided a means of identifying consumer groups with shared interests and also created a larger framework for assessing interest in certified tour products. Figure 1 shows that, for respondents as a whole, value for the money and low travel cost are prime concerns in making vacation decisions. Exploring new places also rates high, followed by predictable vacation quality and certified lodging quality. The light blue bars show the importance attached to five dimensions of certification: certified

FIGURE 1: **Average Ratings of Importance of the Vacation Dimensions**



quality of lodging, certified quality of dining, certified quality of recreation activities, certified environmental standards and certified contributions to the community. Apart from lodging, certification falls in the middle and the lower end of the rankings. Worldwide experience indicates that tourism quality labels create niche markets, not mass markets, so the relatively low

average importance attached to certification is not in itself particularly revealing.

Factor and Cluster Analysis

These widely used statistical tools help determine the size and identify the composition of the potential niche market for a certified quality label. Response patterns can reveal a naturally occurring market segment that would be attracted to certified product quality, environmental standards, and community contributions.

Factor analysis determines how tourists subjectively combine the 22 features of vacation experiences. Highly intercorrelated importance ratings are combined in summary variables, called “factors,” which are subsequently used to identify and label distinct tourist groupings: respondents with similar rating patterns across the factors. Factor analysis of the 22 importance ratings yielded seven summary variables (factors) which we have labeled:

- Importance of learning new things (arts, heritage, nature)
- Importance of self-interested certification (lodging, dining, recreation activities)
- Importance of activities
- Importance of value for the money
- Importance of altruistic certification (environmental stewardship, community contributions)
- Importance of a destination close to home
- Importance of destination familiarity and loyalty

Cluster analysis revealed three distinct groups of leisure travelers, indicating the presence of three market segments. Based on their characteristic preferences, we labeled these clusters *cost sensitive* (22 percent of the sample), *adventurous and discriminating* (60 percent of the sample) and *indifferent* (18 percent of the sample). The most notable finding is that more than half of North American leisure travelers fall into the adventurous and discriminating cluster.

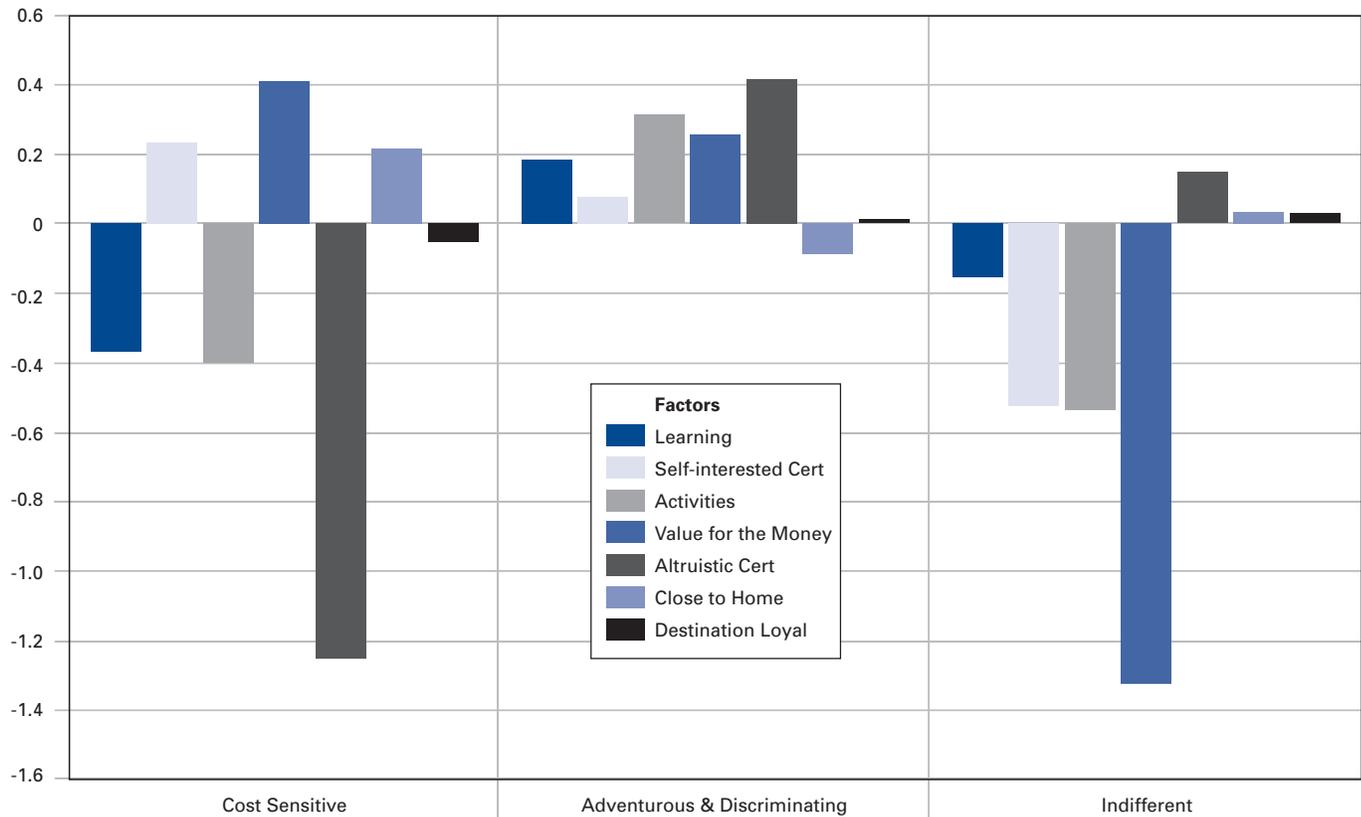
FIGURE 2: **Patterns of Importance Ratings**

Figure 2 shows a profile of each cluster across the seven factors. Arithmetically, each factor has an average of zero across the full sample, so that a factor with a positive value in the graph indicates an importance rating of above average for the cluster. (Conversely, a factor with a negative value indicates that cluster members rated it below the average for the full sample.)

The cost sensitive cluster is defined by a relatively high and statistically significant importance attached to value for the money, self-interested certification, and destinations close to home. The adventurous and discriminating cluster is defined by an elevated and statistically significant desire for vacation experiences that feature high value for the money, altruistic certification, and a variety of activities and learning opportunities, including arts, heritage, and nature experiences. The indifferent cluster is defined by its relatively low—and statistically significant—desire for learning, self-interested certification, specific activities, and value for the money.

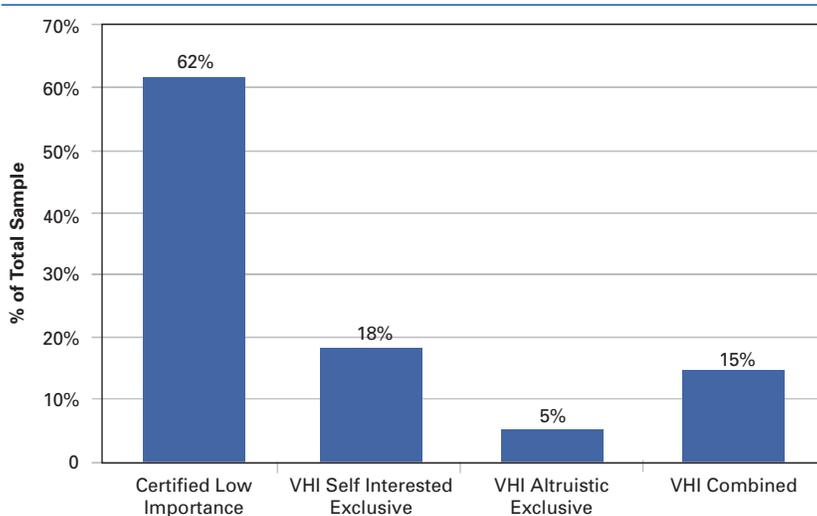
Within the big adventurous and discriminating cluster we would expect to find the niche market of tourists who accord high importance to a certified quality label. Indeed, fully 94 percent of those who attach very high importance to all five types of certification are found within the adventurous and discriminating cluster.

ASSESSING INTEREST IN A MAINE WOODS QUALITY LABEL

The study seeks to answer several questions about those prospective Maine Woods visitors who attach very high importance to certified, quality-labeled vacation experiences. How many are there? Who are they? Would they pay a price premium for certified tour products? In sum: is there a significant opportunity for Maine Woods tourism businesses to profit from a quality label?

The following discussion employs a few specialized terms to group the survey respondents:

FIGURE 3: **Proportion of Respondents Attaching Very High Importance (VHI) to Certification**



- As mentioned, “self-interested certification” refers to quality-labeled lodging, dining, and recreation activities and “altruistic certification” refers to certified best environmental practices and significant contributions to local communities.
- “Very high importance” means that, on a seven-point scale, respondents attach ratings of six (very high importance) or seven (extremely high importance) to certification. We use the acronym VHI for these responses. For simplicity of exposition, all respondents who ascribe less than very high importance to all three self-interested dimensions or to both altruistic dimensions of certification are placed in the residual category, “certification low importance.” (In other words, the term does not literally mean that they attach low importance to certification).

Figure 3 suggests the scope of the potential niche market for quality labeled tour products. Roughly four out of ten respondents (38 percent) attach very high importance to certification: 18 percent exclusively to the three types of self-interested certification, five percent exclusively to the two types of altruistic certification; and 15 percent to all five types combined. Logically, a quality label certifying both self-interested

and altruistic dimensions of vacation experiences would appeal to this entire group although, as we explain later, the “combined VHI” group can be considered the prime target market—the sweet spot—for a quality label initiative.

Of course, the ratings about the importance of certification merely indicate a potential advantage for quality-labeled businesses. Capturing that advantage in practice would require credible certification standards, a compelling brand (quality label), an effective marketing strategy, and actual vacation experiences that confirm the superiority of certified products.

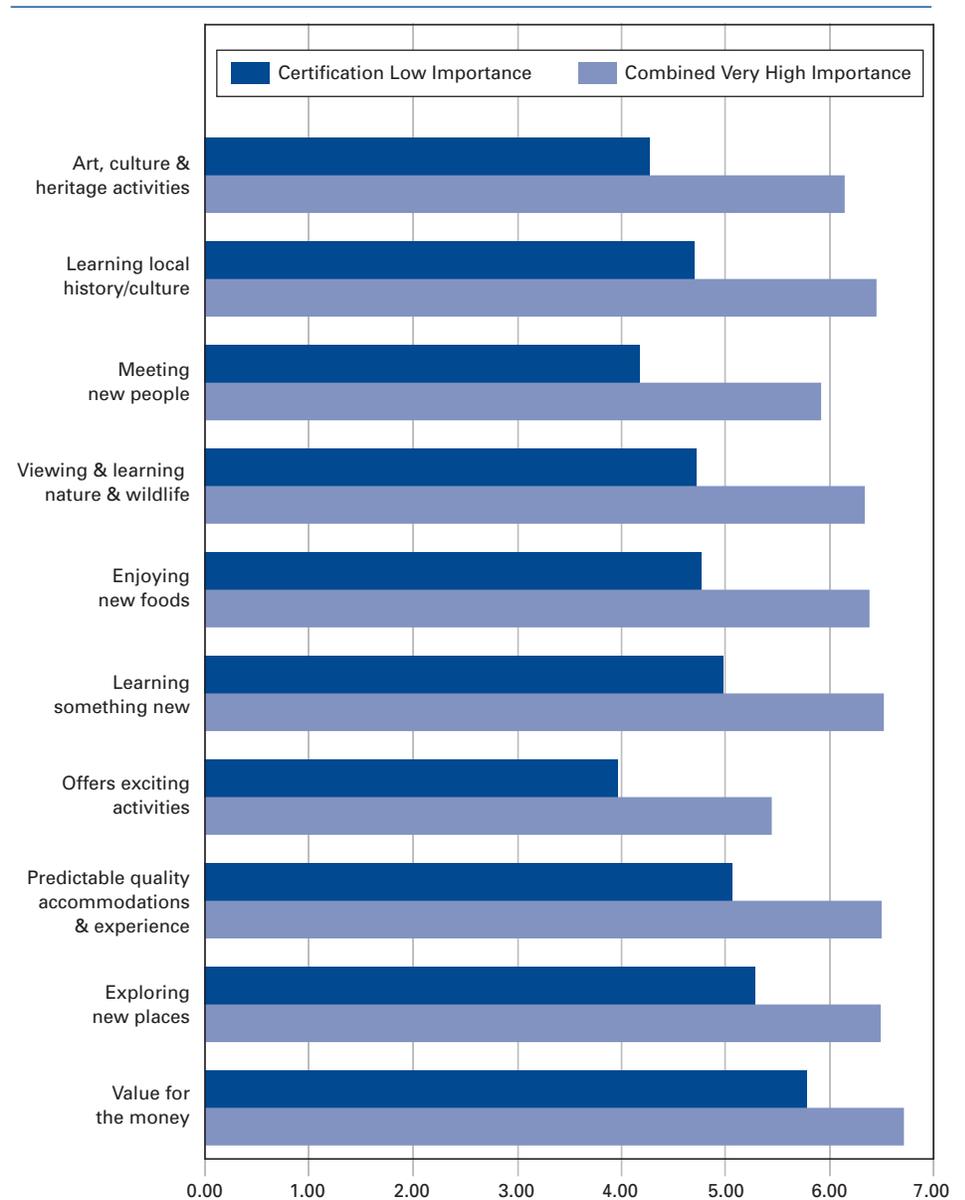
Very high importance of certification turns out to be a good proxy for discriminating, demanding, and adventurous tourists. As shown in Figure 4, the combined VHI group attaches significantly greater importance to all vacation dimensions than the certification low importance group. Parenthetically, this finding aligns closely with a claim made by Fermata Associates (the state’s past tourism consultants). They advocated a rural tourism strategy focusing primarily on *experiential tourists*: travelers who seek varied and high-quality vacation experiences (Fermata 2005).

Numerically, the 33 percent of consumers who attach very high importance to self-interested certification, either exclusively or in combination with altruistic, are the largest group of highly motivated travelers. Thus, it might seem sensible to design a quality label based only on outstanding dining, lodging, and recreation. That would probably be a strategic mistake, however, since the most highly motivated and most discriminating of all prospective visitors are the two groups who attach very high importance to environmental practices and community contributions, either exclusively (five percent) or in combination with dining, lodging, and recreational activities (15 percent). Specifically, this 20 percent cohort accords by far the highest importance to “exciting activities,” “vigorous activities,” “viewing and learning about nature and wildlife,” and “arts, culture and heritage activities.”

Who’s in the Market for Certified Tour Products?

The groups who attach very high importance to certification do not stand out sharply in terms of

FIGURE 4: **Select Comparative Importance Ratings, Ordered by Size of Ratings Differences**



demographic characteristics. The only statistically significant difference is that the combined VHI group is more likely to have young children than the full sample (42 percent vs. 30 percent). Although not statistically significant, this group is also slightly younger and better educated and has marginally lower incomes. The lack of clear distinguishing features complicates the task of identifying target groups for a quality label marketing strategy.

As explained, the survey sample reflects the North American population, adjusted to oversample Maine's drive market. Actual Maine Woods visitors have significantly higher incomes (71 percent above \$50,000 compared to 42 percent in the survey sample) and are more highly educated (77 percent have at least a bachelor's degree compared to 35 percent in the survey). Our intuition was that, if anything, more affluent and better-educated travelers would give greater weight to certified tourism products. Highly educated travelers seem more likely to seek out superior products and high-income people can better afford to pay for them. However, a reevaluation of responses giving greater statistical weight to high-income respondents revealed no significant changes in the conclusions.

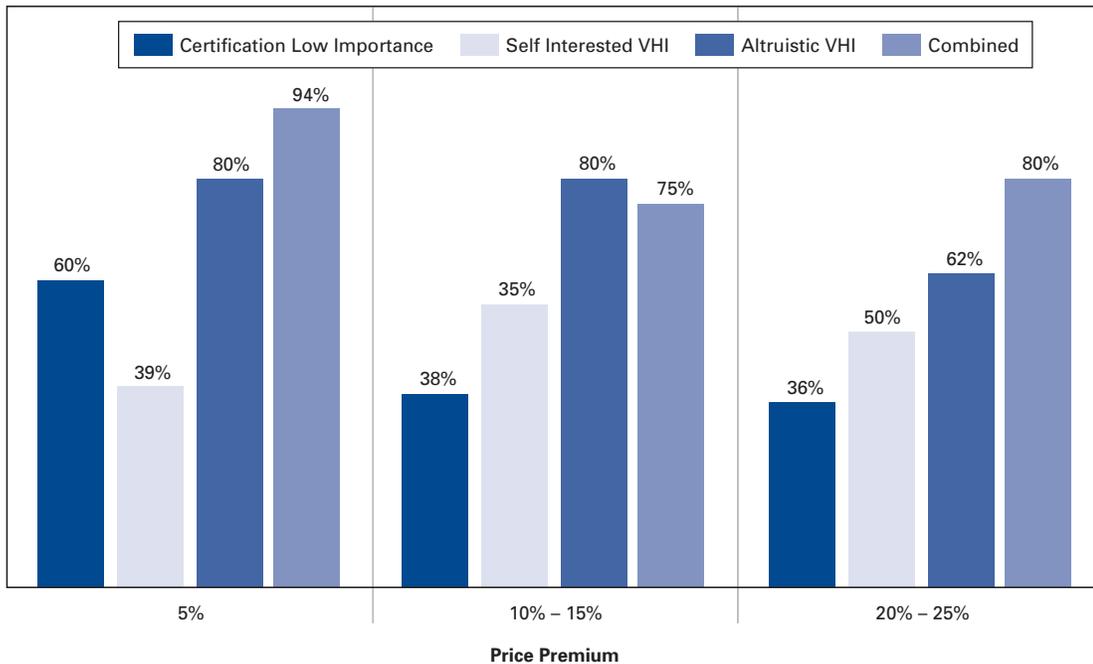
Fewer of the combined VHI group has already vacationed in Maine (36 percent vs. 42 percent of the full sample). However, many more of them expect to pay a first visit to Maine in the future: 64 percent vs. just 38 percent of the full sample. A certified quality label might reinforce those good intentions.

Willingness to Pay a Price Premium for Certified Vacation Experiences

After respondents expressed their degree of interest in eight Maine Woods Discovery (MWD) vacation packages, they were directed to focus on their "favorite" MWD vacation and then asked about their willingness

to pay a price premium if that package carried a quality label. The label described to them included certification of all five vacation dimensions. The sample was randomly divided into fifths with each exposed to a different price premium: five percent, 10 percent, 15 percent, 20 percent, and 25 percent. Figure 5 shows the responses of various certification importance

FIGURE 5: Willingness to Pay a Price Premium for Certified Vacation Experiences



groups, with the five price premiums summarized as five percent, 10–15 percent, and 20–25 percent.

The response patterns can be interpreted in various ways, and they do not translate readily into a pricing guideline for certified businesses. (In particular, we cannot offer a compelling behavioral explanation of some statistical artifacts, for instance why the self-interested VHI group's willingness to pay rises when the price premium increases from five percent to 10–15 percent and then falls at 20–25 percent or why the combined VHI group's willingness to pay falls between five and 10–15 percent but then increases at 20–25 percent.) It is nonetheless striking that more than 75 percent of the combined VHI and altruistic VHI groups (using a weighted average) are willing to pay a 20 to 25 percent premium. This reinforces the expectation that a well-designed and effectively promoted Maine Woods quality label would strengthen participating businesses' "market edge" by increasing their pricing leverage. It is especially noteworthy that even three-fifths of respondents who attach low importance to certification indicate a willingness to pay a five percent premium. This supports the interpretation that a market-verified quality label is widely viewed as a proxy for high quality and value for the money.

Since the certification process itself and the promotion of quality-labeled products would have costs, it is encouraging to think that a modest price premium might recoup them. Recalling that the Maine Woods' actual overnight visitors have considerably higher incomes than the survey sample, willingness to pay a premium may be even higher than the survey results indicate. In sum, the evidence of widespread willingness to pay a price premium adds an encouraging footnote to the evidence of a sizable market niche for quality-labeled vacation experiences.

CONCLUSIONS AND STRATEGIC INSIGHTS

Recapping the most salient survey findings: nearly four out of ten leisure travelers are responsive to the benefits promised by quality-labeled vacation experiences. A label certifying both the self-interested and altruistic aspects of tour products would positively influence the most prospective visitors. However, the prime target market would be the 20 percent who attach very high importance to certified environmental stewardship and community contributions, either exclusively or in combination with outstanding quality of dining, lodging, and recreation activities. Three-fourths of this target group expresses willingness to pay a 20 to 25 percent price premium for certified vacation experiences, and even 60 percent of those who attach lower importance to certification express willingness to pay five percent more for quality-labeled products. The positive response to a hypothetical quality label suggests a significant opportunity to develop a niche market, particularly for a tourist destination and participating businesses that get a jump on their competitors and

capture a “first-mover advantage.” This optimistic view must be tempered, however, by recognition that many steps are required to realize the promise uncovered by survey data. The research reported here raises several strategic questions.

Would a Maine Woods Quality Label Provide a Lasting Competitive Advantage?

The findings offer strong evidence that a quality label could strengthen the Maine Woods’ competitive advantage, as part of a coordinated strategy to lead market trends. Evidence from places as diverse as Costa Rica and Sweden suggests that early adoption of a quality label, combined with strong promotion, enhances the reputation of the entire destination, not just the participating businesses (Vail 2011).

However, the window of opportunity is probably limited to a few years. Porter (1980) suggests that the competitive advantage from an innovation dissipates as competitors imitate or surpass it to protect their own market share. Thus, timing matters: as the recent launch of “New Hampshire Grand” indicates, rival destinations are developing their own quality labels. Furthermore, first movers cannot rest on their laurels: continuous improvement in both products and marketing are crucial to sustain customers’ confidence that they are buying exceptional vacation experiences.

What Are the Benefits from Coordinated Marketing of a Shared Brand?

Most of the likely participants in a Maine Woods quality labeling initiative are small businesses, with 25 or fewer employees. In view of their extremely limited marketing budgets, a widely recognized quality label has three potential benefits. First, it exposes their products to a far larger market than they could hope to reach individually. Second, economies of scale through collective marketing reduce the cost of acquiring new customers. Third, a brand that stands for excellence is likely to generate earned (i.e., free) media coverage beyond what small businesses can achieve on their own.

What Are the Implications for Pricing Strategy?

It is promising that the prime market segment for a quality label, one-fifth of leisure travelers, expresses willingness to pay a substantial price premium for

Not the First Time These Tourists Have Been “Discovered”

Four Directions Development Corporation, a Native American community-development financial institution serving Maine’s four Wabanaki tribes, conducted its own survey of North American leisure travelers in 2010. The purpose was to determine if a potential market might exist for “voluntourism” experiences, combining community service with recreation and delivered by the Wabanaki communities. We identified a market segment that is remarkably similar to the adventurous and discriminating cluster and the combined VHI certification group, in essence corroborating the existence of these segments of the leisure-travel market.

We discovered a tourist segment that expressed a high level of interest in itineraries offering exposure to and learning about Native American culture and heritage. Like the adventurous and discriminating cluster and the combined VHI certification group, their interest extended to experiencing authentic cultures in their natural environment. This 20 percent segment of leisure travelers also exhibited a genuine interest in service to our communities as a way to learn about Wabanaki cultures.

As a result of this discovery, we are currently developing a set of unique voluntourism experiences, featuring meaningful service opportunities such as archeological field work and activities centered on our communities’ abundant natural resources. These experiences will be delivered by and within our communities. Although developing the physical and institutional infrastructure to deliver high-quality voluntourism experiences will take time, the process got under way in summer 2012 with a small-scale pilot trip in partnership with the Penobscot Indian Nation.

The Four Directions Voluntourism Team: Susan Hammond, Bonnie Newsom, Jen McAdoo, Helen Scalia, Chris Schrum and Harold Daniel

certified vacation experiences. Even a majority of those who do not attach very high importance to certification indicate that they would pay a five percent price premium, presumably for the quality assurance conveyed by the label. These responses suggest that businesses offering quality-labeled products could recoup certification costs and enhance profits by setting higher

price points than their noncertified competitors. However, caution is needed in drawing inferences for pricing strategy. For one thing, a hypothetical survey question cannot substitute for real-world pricing experiments. Equally important, most certified businesses would presumably want to attract more customers than just the niche group strongly drawn by and willing to pay for a quality label. There is thus likely to be a tradeoff between price and customer volume. Past patrons, in particular, might react negatively to a conspicuous price increase. In sum, although the survey offers good news about tourists' willingness to pay for quality-labeled products, every participating business must discover its own optimum price points by balancing expected benefits and costs.

What Can Maine Woods Communities and Regions Do?

The short answer is to develop itineraries—or “experience packages”—that appeal to the combined VHI certification segment. Community and regional tourism planners could appeal to this segment by developing a mix of commercial and free-access experiences featuring opportunities to learn new skills, meet new people, enjoy local foods, and of course, experience nature. Itineraries would blend local culture and heritage with the Maine Woods' outstanding natural attractions. The special contribution of a Maine Woods quality label would be its highly visible brand and reputation for top quality.

What Can the State Do?

Maine already offers tourists abundant learning opportunities, running the gamut from country fairs to historical societies, guided wildlife watching, and L.L. Bean's Outdoor Discovery programs. Statewide, opportunities for tourists to gain new knowledge and appreciation of local culture and environments are broad and deep. The Office of Tourism, for example, currently supports numerous destination trails, including birding, fiber arts, landscape garden, craft, art museum, biking, and fishery. This study suggests that there could be a powerful synergy between state-supported learning-and-doing experiences and a label certifying the best commercial tourism products.

Getting From Here to There: Steps toward a Maine Woods Quality Label

After learning about the survey findings, nearly all stakeholders at the Maine Woods Consortium's *Profiting from Quality Maine Woods Vacation Experiences* retreat supported further exploration of a distinctive Maine Woods quality label. Predictably, there were diverse views about the best design and most effective organizational structure for the program, which raises a final question: What would it take to get from the present discussion phase to the real-world launch of a Maine Woods quality label? Destinations that already offer certified tour products have taken a range of approaches and their experiences give us a sense of the main steps along the way (Vail 2011).

1. *Eligibility:* What range of businesses, destinations, or other entities can be certified?
2. *Principles and standards:* What core principles will guide the design of performance standards? What weight will be given to quality vacation experiences, sustainable environmental practices, and contributions to host communities?
3. *Rigor:* Should entry-level certification be easy to achieve, encouraging a large number of participants; or should it be rigorous, admitting only “the best of the best?” Should there be a single certification standard or several levels, such as silver, gold, and platinum?
4. *Relationship with existing quality initiatives:* Should hospitality businesses have to meet Maine Environmental Leader standards and secure an AAA three diamond rating? Should guides and outfitters meet Master Maine Guide standards?
5. *Application:* Will applicants simply complete a survey attesting to their own practices or will there be an independent third-party audit? Will training and technical assistance be provided?
6. *Creating the brand:* What are potent tag lines, visual images, and a logo to communicate the

essence of the Maine Woods' highest-quality tourism products?

7. *Seed money*: How will organization building be financed and how will money be raised for a “big push” marketing effort? What are appropriate application fees and ongoing membership dues?
8. *Recruiting initial applicants*: What combination of information, persuasion, and tangible incentives can mobilize the critical mass of applicants needed for a successful launch?

Some of these steps would undoubtedly be contentious. And, even if stakeholders could reach consensus on all the details, realizing a quality label's potential market advantage in competitive real-world markets would require participation by outstanding businesses, a credible certification process, an eye-catching brand, and a smart, well-financed marketing strategy. We look forward to being “participant observers” as the process unfolds. 🐟

ENDNOTES

1. The MWC is an open association of business, government, and nonprofit entities, including Androscoggin Valley Council of Governments, Appalachian Mountain Club, Bethel Area Chamber of Commerce, Coastal Enterprises, Inc., Maine Office of Tourism, Maine Rural Partners, Manomet Center for Conservation Sciences, Northern Forest Center, Northern Maine Development Commission, Sunrise County Economic Council, and Western Mountains Alliance.
2. For a thorough discussion of factor and cluster analysis and their use in this study see Daniel, Vail and Burns (2012: Appendix 3). See also Wikipedia, “Factor Analysis and Cluster Analysis.”

Briefly, *factor analysis* simplifies complex data by identifying latent variables, based on the intercorrelation between individual variables. This study employs factor analysis to simplify the importance ratings. We used principle components analysis (PCA) supplemented by a Varimax rota-

tion. Varimax is a popular algorithm to improve the interpretability of factor analysis output. Respondents' factor scores (weighted averages representing each factor or latent variable) were later used in the clustering of respondents.

Cluster analysis describes a class of algorithms that organize respondents into groups with common characteristics. We use the K-Means algorithm, one of the most popular, to partition observations in the database into K clusters, where “K” is an input variable. We used the algorithm to create from two to as many as eight distinct clusters, ultimately selecting the solution that yielded large enough clusters (at least 35 members) to reliably profile the members. This condition occurred with three clusters, which we labeled “cost sensitive,” “adventurous and discriminating” and “indifferent.” Solutions with more than three clusters all yielded some groups with sample sizes smaller than 35.

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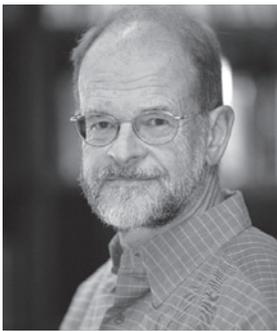
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