

Cariboo Chilcotin Coast MRDT Program 2023 Stakeholder Satisfaction Survey Results & Analysis of 2022 Programs

Prepared by The Web Advisors, on behalf of the Cariboo Chilcotin Coast Tourism Marketing Association

Cariboo Chilcotin Coast MRDT Program 2023 Stakeholder Survey (of 2022 Programs)



Table of Contents:

Executive Summary	2-3
Section 1: Familiarity & Awareness of the Cariboo Chilcotin Coast Tourism Marketing Association	4-8
Section 2: Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's Programs and Activities	9-13
Section 3: Overall Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association	14-20
Section 4: The Cariboo Chilcotin Coast Tourism Marketing Association Strives to Collaborate & be an Inclusive, Industry-driven Organization	21-23
Section 5: Building Additional Insights About Tourism in the Cariboo Chilcotin Coast	24-29
Section 6: Moving Forward - The Future of Tourism in the Cariboo Chilcotin Coast	30-38
Appendix A: Research Objectives & Methodology	39-40

Executive Summary:



- 1. 153 stakeholders were invited to complete the survey. 53 surveys were completed for a 34% response rate. This is an increase of one more completed response over the previous year's survey.
- 2. Section 1: Mean scores on Familiarity and Awareness of the CCTMA decreased on 10 out of 13 questions. While the mean scores dipped, it should be noted overall, 62% of survey respondents were either Very Familiar or Familiar with CCCTMA, and 79% believe the CCCTMA are leaders in consumer marketing. Notable changes within the survey responses:
 - a. Overall Familiarity with CCCTMA score declined 1% with a mean score 3.77 vs 3.81 last year. Major decreases in connectivity with partners could be seen in questions related to awareness of MRDT collection area representative and availability of free advertising on landwithoutlimits.com
 - **b.** Awareness about the free, direct booking capabilities on book.landwithoutlimits.com offering referrals or integration with Property Management System was a new addition to the survey and had a relatively high mean awareness average.
- 3. Section 2: Mean scores on Satisfaction of the CCCTMA's Programs and Activities decreased on 12 of 14 questions. A significant decrease in satisfaction was reported on Delivering targeted brand campaigns to drive room occupancy and rate as well as the creation and development of responsible travel content was reported.
- 4. Section 3: Mean scores on Overall Satisfaction of the CCCTMA decreased on 5 of 6 questions with more respondents noting Don't Know/Not Applicable or Neutral on responses, which indicate opportunities for increased awareness/engagement with stakeholders.
- **5. Section 4:** Mean scores on the CCCTMA striving to be an inclusive, industry-driven organization declined on 6 of 8 questions. Decreases in scoring again appears to be related to respondents awareness of initiatives and CCCTMA engagement with stakeholders.

Executive Summary (continued)

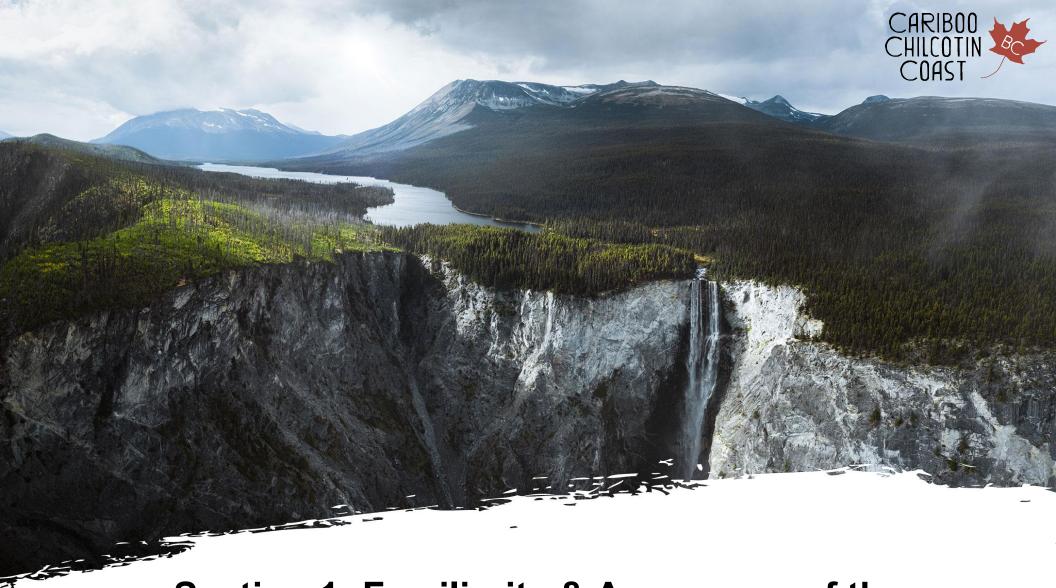


6. Section 5: Building Additional Insights About Tourism in the Cariboo Chilcotin Coast

- a. 61% of **respondents** identified as Accommodation providers (a decrease of 18% in respondents), 27.78% identified as "Other" (increase of 127%) with Guest Ranching mentioned in comments. Indiciating they do not identify as accommodation or Attraction providers.
- **b.** Tourism Market Percentages (in 2022): BC 55%, USA 12%, Europe 6%, AB 6%, Canada Other 5%, Aust/NZ 1%, Int'l Other 0.5%, Don't know 13%. These percentages demonstrate a return of some US and international travel
- c. Tourism Revenue Seasonal Percentages (in 2022): Spring 11%, Summer 60%, Fall 25%, Winter 4%
- **d. Tourism revenue changes in 2022 vs 2021** revenue increased for 79% businesses, decreased for 6% of businesses, was same as 2021 for 12% of respondents.

7. Section 6: Moving Forward - The Future of Tourism in the Cariboo Chilcotin Coast

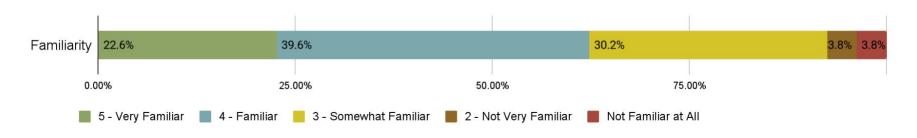
- a. The top 3 barriers to growth for tourism in region have been identified as Wildfires/Natural Disasters, Infrastructure/Roads, and Inflation & Operating Costs. Qualitative responses on page 31 are worth further review.
- **b.** The **top 3 tourism products** identified for future growth potential are: Wildlife & Eco-Tours, Paddling including Canoeing, Kayaking & Stand-Up Paddleboard and Fishing & Hunting.
- c. The top 3 marketing activities of perceived importance are: Social Media Presence, Digital Advertising and Website: LandWithoutLimits.com
- **d.** The **top 3 non-promotional marketing activities** of perceived importance are: Visitor Services, Community Relations and Trip Planning.
- e. Notable Last words on page 38
 - i. Would like to see the annual 'guide' become more than the current storybook souvenir format.
 - ii. I don't think it [MRDT] should be charged to guide outfitting organizations, as it is not CCCTMA mandate to promote this.
 - iii. Gold Rush Trail excellent publication. Route plans that identify resorts and activities/events along the way so you get a great experience and not miss out on events or resorts as you travel your route
 - iv. Please reach out to unique tourism operators that are sensitive to over exposure, support us in regulations that will protect our waters & not over expose areas that are sensitive to not being able to remain "Wilderness experiences" because of "Overexposed".
 - v. I would like to thank all of the CCCTMA for their dedication and support they provide us with throughout the year and for all the services and opportunities you are providing us with.
 - vi. we're at a critical juncture as a resort in the south cariboo. 2023 will determine whether we continue in the tourism sector or shut down operations to short term rentals and rent out our accommodations to long term renters (becoming landlords instead of resort owners)



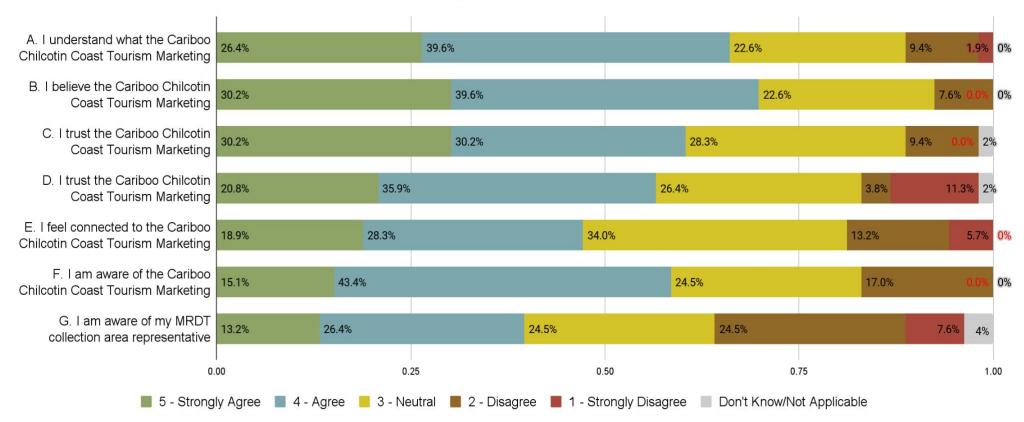
Section 1: Familiarity & Awareness of the Cariboo Chilcotin Coast Tourism Marketing Association



Q1. How familiar are you with the Cariboo Chilcotin Coast Tourism Marketing Association

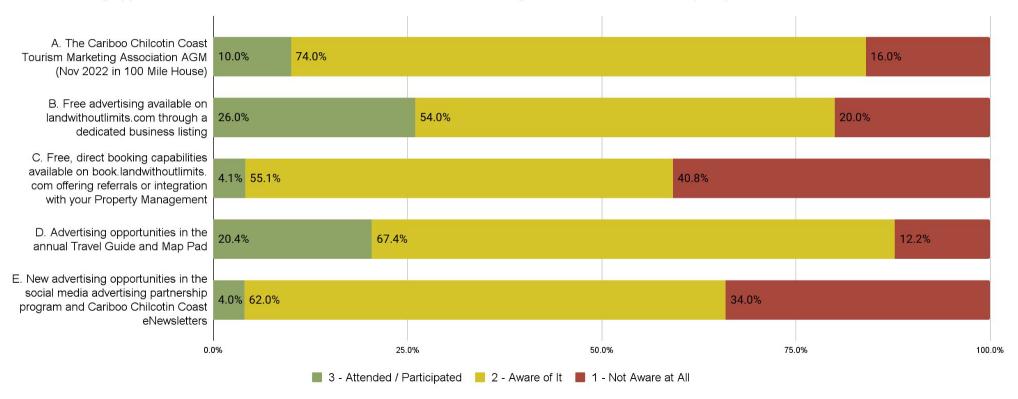


Q2. On a scale of 1 to 5, where 1 is 'Strongly Disagree' and 5 is 'Strongly Agree,' please rate your level of agreement with the following statements about the Cariboo Chilcotin Coast Tourism Marketing Association





Q3. On a scale of 1 to 3, where 1 is 'Not Aware at All' and 3 is 'Attended/Participated', how aware are you of the following information sessions, workshops, and advertising opportunities that the Cariboo Chilcotin Coast Tourism Marketing Association hosted in the past year?





The table below summarizes the mean scores (average of 5) of all statements regarding the familiarity and awareness of the program.

	<u>2022</u>	<u>2021</u>	% Diff:
Q1. Familiarity with The Cariboo Chilcotin Coast Tourism Marketing Association	3.77	3.81	-1.05%
Q2A. I understand what the Cariboo Chilcotin Tourism Marketing Association does for my business	3.79	3.85	-1.56%
Q2B. I believe the Cariboo Chilcotin Coast Tourism Marketing Association acts as a leader in consumer marketing for tourism	3.92	3.92	0.00%
Q2C. I trust the Cariboo Chilcotin Coast Tourism Marketing Association to market the destination effectively	3.75	3.87	-3.10%
Q2D. I trust the Cariboo Chilcotin Coast Tourism Marketing Association to help my business thrive	3.45	3.58	-3.63%
Q2E. I feel connected to the Cariboo Chilcotin Coast Tourism Marketing Association	3.42	3.45	-0.87%
Q2F. I am aware of the Cariboo Chilcotin Coast Tourism Marketing Committee	3.57	3.64	-1.92%
Q2G. I am aware of my MRDT collection area representative	3.02	3.68	-17.93%
Q3A. The Cariboo Chilcotin Coast Tourism Marketing Association AGM (Nov 2022 in 100 Mile House)	2.53	2.69	-5.95%
Q3B. Free advertising available on landwithoutlimits.com through a dedicated business listing	2.69	3.55	-24.23%
Q3C. Free, direct booking capabilities available on book.landwithoutlimits.com offering referrals or integration with your Property Management System	3.55	N/A	N/A
Q3D. Advertising opportunities in the annual Travel Guide and Map Pad	3.43	3.43	0.00%
Q3E. New advertising opportunities in the social media advertising partnership program and Cariboo Chilcotin Coast eNewsletters	2.65	2.69	-1.49%



Q4. Moving forward, what educational topics or networking opportunities would you like the Cariboo Chilcotin Coast Tourism Marketing Association to consider?

Sub-regional meetings in regards of the tourism landscape, what is happening, where are issues, what needs to be addressed and to get feedback from tourism operators, 1 hr in length, 4x per year, online participation, lead by CCCTA staff.

Marketing destination lodges

Cultural presentations to Europe

Hospitality insurance - how to deal with insurance waivers for resorts and also smaller events (challenges, legal meaning, best practice)

Eco Tourism

Sub-regional meetings in regards of the tourism landscape, what is happening, where are issues, what needs to be addressed and to get feedback from tourism operators, 1 hr in length, 4x per year, online participation, lead by CCCTA staff.

Foreign workers and seasonal workers

Pack in pack out info. Accessibility for everyone

Roundtable discussion with other members re services and opportunities.

Pack in pack out info. Accessibility for everyone

Roundtable discussion with other members re services and opportunities.

It would be great to have a virtual exchange of experience among the accommodation owners moderated by CCCTA from time to time

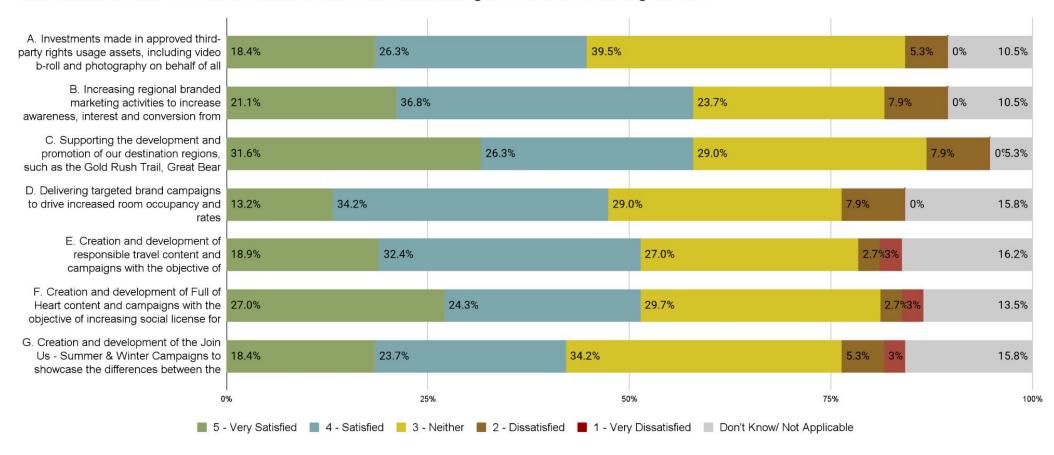
I pay into the hotel tax and the mrdt. Most of the marketing is directed at road traffic which I have nothing to do with. The indigenous tourism is very good at promoting high end remote lodges and experiences, but you have to be native to get this type of exposure. It would be nice to see this type of exposure for the non-indigenous tourism operators that are remote across the province.



Section 2: Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's Programs & Activities



Q5. Satisfaction with The Cariboo Chilcotin Coast Tourism Marketing Association's Marketing Initiatives



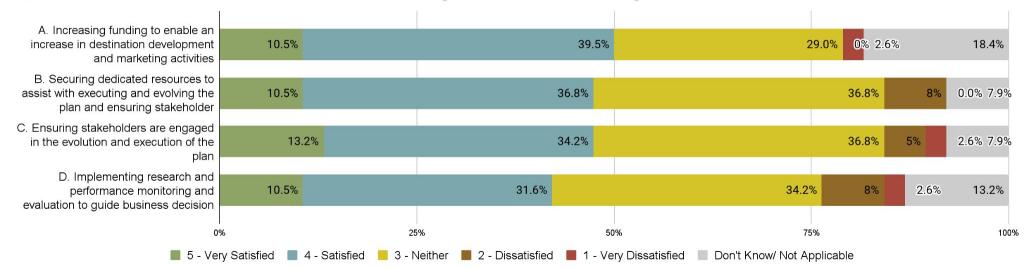


The table below summarizes the mean scores (average of 5) of all statements regarding the satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's work on marketing the Cariboo Chilcotin Coast.

	<u>2022</u>	<u>2021</u>	% Diff:
Q5A. Investments made in approved third-party rights usage assets, including video b-roll and photography on behalf of all stakeholders, communities and product experiences in the region	3.26	3.32	-1.81%
Q5B. Increasing regional marketing activities to increase awareness, interest & conversion from existing short-haul & international markets	3.39	3.36	0.89%
Q5C. Supporting the development and promotion of our destination regions, such as the Gold Rush Trail, Great Bear Rainforest, Chilcotin and Land of Hidden Waters	3.66	3.98	-8.04%
Q5D. Delivering targeted brand campaigns to drive increased room occupancy and rates	3.05	3.52	-13.35%
Q5E. Creation and development of responsible travel content and campaigns with the objective of encouraging responsible travel planning prior to arrival and observance will in the Cariboo Chilcotin Coast	3.14	3.86	-18.65%
Q5F. Creation and development of Full of Heart content and campaigns with the objective of increasing social license for tourism in the Cariboo Chilcotin Coast communities	3.3	3.49	-5.44%
Q5G. Creation and development of the Alone Campaign to leverage upon the unique opportunity of the 8th Season of Alone - Grizzly Mountain being filmed in the Tŝilhqox Biny (Chilko Lake) area	3.03	3.07	-1.30%



Q6. Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's Tourism Management

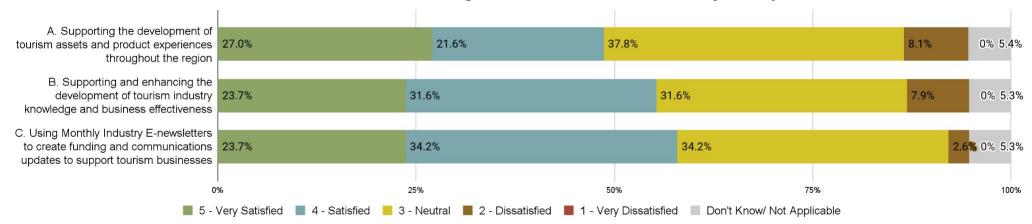


The table below summarizes the mean scores (average of 5) of all statements regarding the satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's tourism management.

	<u>2022</u>	<u>2021</u>	% Diff:
Q6A. Increasing funding to enable an increase in destination development and marketing activities	3.00	3.33	-9.91%
Q6B. Securing dedicated resources to assist with executing and evolving the plan and ensuring stakeholder engagement	3.26	3.38	-3.55%
Q6C. Ensuring stakeholders are engaged in the evolution and execution of the plan	3.26	3.22	1.24%
Q6D. Implementing research and performance monitoring and evaluation to guide business decision making	3.00	3.18	-5.66%



Q7. Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's Destination & Industry Developement Initiatives



The table below summarizes the mean scores (average of 5) of all statements regarding the satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's destination and industry development initiatives.

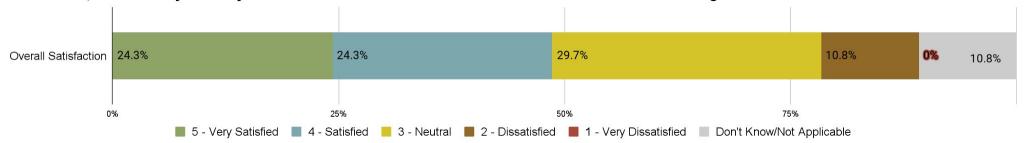
	<u>2022</u>	<u>2021</u>	% Diff:
Q7A. Supporting the development of tourism assets and product experiences throughout the region	3.51	3.72	-5.65%
Q7B. Supporting and enhancing the development of tourism industry knowledge and business effectiveness throughout the region	3.55	3.67	-3.27%
Q7C. Using Monthly Industry E-newsletters to create funding and communications updates to support tourism businesses in the region	3.63	3.81	-4.72%



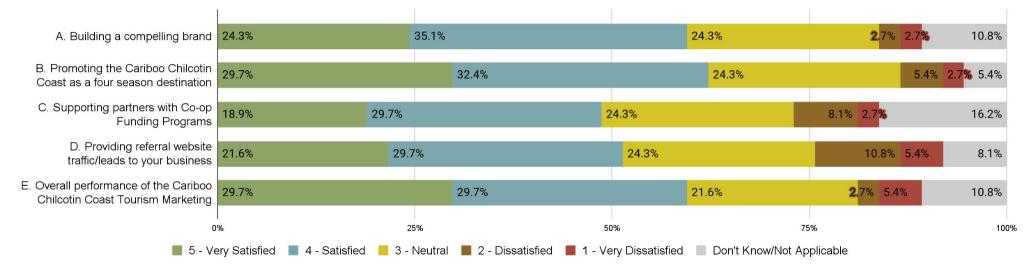
Section 3: Overall Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association



Q8. Overall, how would you rate your satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's use of MRDT funds?



Q9. Overall Satisfaction with Services Provided by the Cariboo Chilcotin Coast Tourism Marketing Association:



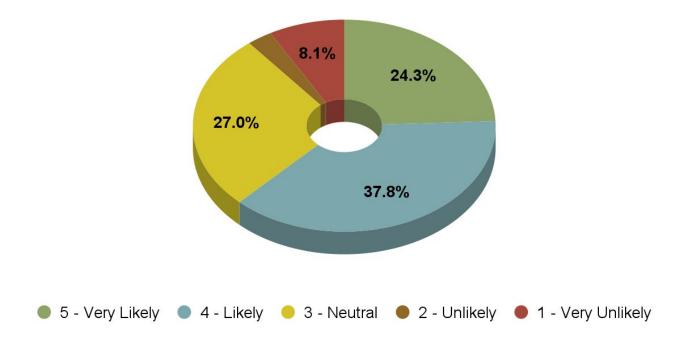


The table below summarizes the mean scores (average of 5) of all statements regarding overall satisfaction with the services provided by the Cariboo Chilcotin Coast Tourism Marketing Association.

	<u>2022</u>	<u>2021</u>	% Diff:
Q8. Overall, how would you rate your satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's use of MRDT funds?	3.30	3.68	-10.33%
Q9A. Building a compelling brand	3.43	3.90	-12.05%
Q9B. Promoting the Cariboo Chilcotin Coast as a four season destination	3.65	3.81	-4.20%
Q9C. Supporting partners with Co-op Funding Programs	3.05	2.86	6.64%
Q9D. Providing referral website traffic/leads to your business	3.27	3.55	-7.89%
Q9E. How satisfied were you with the overall performance of the Cariboo Chilcotin Coast Tourism Marketing Association	3.43	3.93	-12.72%



Q10. How likely is it that you would recommend the Cariboo Chilcotin Coast Tourism Marketing Association's stakeholder programs to a colleague or another business in the region?



<u>2022</u>	<u>2021</u>	% Diff:
62.16%	70.73%	-12.12%



Q11. During the past 12 months, are there aspects of services provided by the Cariboo Chilcotin Coast Tourism Marketing Association that you are dissatisfied with?

"My understanding is that some of the government organizations take a portion of the operator funded MRDT. This should be disallowed.

2) I just watched a video on the Cariboo Chilcotin from bc tourism about cattlemen. Not sure what this has to do with tourism. Shouldn't you be supporting the tourism operators? I am out of Canada and the ads for BC are pretty pathetic including the website Hello BC."

We asked for support to get highway signages and asked several times, but there was no response

Extremely poor engagement and communication on the MRDT

Lack of representation for our area, our businesses, or the contributions of our nonprofits in driving tourism dollars to the regional assets you describe.

I don't have enough time to delve deeply into all the information as it comes from other sources too and we are running a year round resort. I like what I see and they are there for me when I reach out.

The only interaction I have had with CCCTA is a solicitation for our community to join the MRDT. I do not feel that CCCTA interested in promoting the work of my organization unless is is flashy and spectacle-based

Not that I can think of besides not being aware of the beautiful Full of Heart creation content; I love it

We provide a wilderness fly fishing experience to guests & do not want our areas to be over exposed. Fish are very sensitive to being "Overly fished"....& die from being hooked too often. We give areas we fish time to heal.....we need to protect our wild waters. We have fished this area for 54 years & it must be protected.

I guess my problem is, hunting provides 85 % of my revenue and 90% of my contributions. The cccta is not geared to market this, and therefore I get little out of it. I believe everything else related to tourism, they do a great job with. It just doesn't help my main business.

Funding provided for a one-day photo shoot was implemented in 2022, leading to an expansion of the service (because it was now affordable), which led to our first promotional video!

No x7



Q12. Is there an opportunity or service that the Cariboo Chilcotin Coast Tourism Marketing Association could offer you that would be beneficial to your organization?

We would like to engage with you re booking integration with our PMS. We would love guests to be able to book our ranch through you.

Advocate on behalf of stakeholders to allow cost-free advertising on BC Ferries' Northern Sea Wolf in the form of individual racking or at least regional guides.

Follow bigger centers

Cultural

Let us know about grants specifically for tourism operators which become available as we go

I would like to see a breakdown of the MRDT that is collected and how it is allocated.

Continue marketing of the chilcotin as a year round destination, promote highway 20 as an iconic route

Again, the whole insurance thing is going to be an issue in the future. If there are long-term viable options to switch to a partner that would be amazing.

Start promoting tourism like the indigenous tourism operators get. The remote experience.. That should be for every high end fly in operator in BC. There is none of that. It's all about road traffic.



Q13. Are there any other ways the Cariboo Chilcotin Coast Tourism Marketing Association could serve you better?

The CCCTA has always been there when I've needed them! I appreciate the support given me and my business; I may be unique in some ways as most of my customers I've grown up with and often have 4 generations in camp! My vacancy rates is low, my customers return yearly, maybe 2-4 times during the season so my requirements are minimal! I thank everyone for their support!

Let's talk!

By getting 100 mile house out there

Representing those that live and work in the area together with the first nations for a long term appreciation of the environment and opportunity to enjoy without negative impact

We do not market BC & very little in Alberta. We do not offer anything less than 3 day fly fishing trips. This keeps the weekend warriors with their 350 hp jet boats from ripping up the spawning beds this is real stuff. call me:)

Like the newsletters every month; send information out, during off season, especially if you ask for our participation, like this survey

I would like to see more clarity on what the organizations offers. I would like to know who our MRDT rep is.

Respond to enquiries in a timely way, or at all

Give better support if there are problems

Get rid of the tax. I can use these funds to promote my own business. Investing in BC Tourism funds is like throwing money down the toilet.

Pizza delivery

No x4

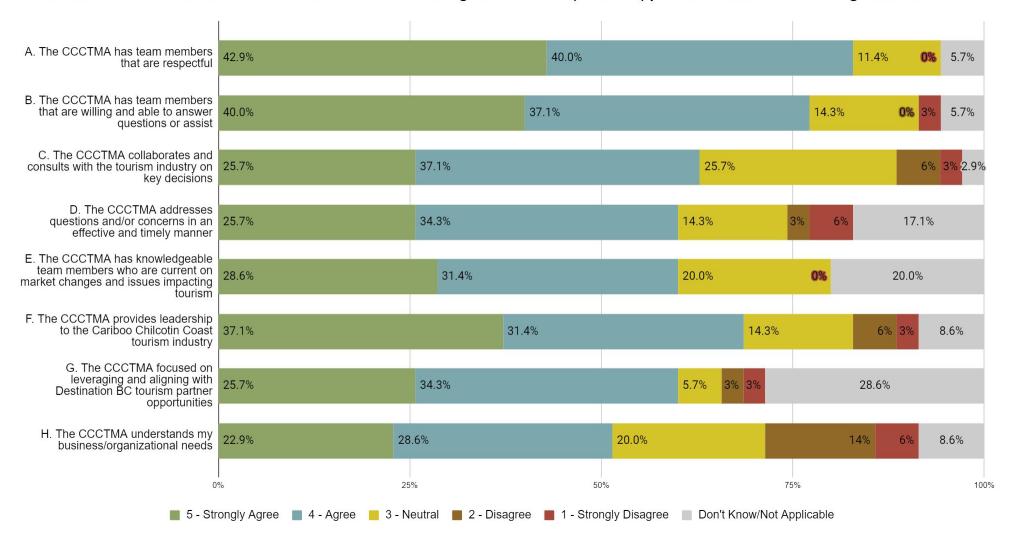


Section 4: The Cariboo Chilcotin Coast Tourism Marketing Association strives to collaborate and be an inclusive, industry-driven organization.

Section 4: Collaborative, Inclusive, & Industry-driven



Q14. Please rate the Cariboo Chilcotin Coast Tourism Marketing Association's (CCCTMA) performance for the following statements:



Section 4: Collaborative, Inclusive, & Industry-driven



The table below summarizes the mean scores (average of 5) of all statements regarding the Cariboo Chilcotin Coast Tourism Marketing Association's performance.

	<u>2022</u>	<u>2021</u>	<u>% Diff:</u>
Q14A. Has team members that are respectful	4.09	4.21	-2.85%
Q14B. Has team members that are willing and available to answer questions or assist	3.94	3.93	0.25%
Q14C. Collaborates and consults with the tourism industry on key decisions	3.69	3.62	1.93%
Q14D. Addresses questions and/or concerns in an effective and timely manner	3.20	3.71	-13.75%
Q14E. Has knowledgeable team members who are current on market changes and issues impacting tourism	3.29	3.62	-9.12%
Q14F. Provides leadership to the Cariboo Chilcotin Coast's tourism industry	3.69	3.88	-4.90%
Q14G. Is focused on leveraging and aligning with Destination BC tourism partner opportunities	2.91	3.62	-19.61%
Q14H. Understands my business/organizational needs	3.23	3.38	-4.44%



Section 5: Building Additional Insights About Tourism in the Cariboo Chilcotin Coast



Q15. How would you describe your business/organization; Is it a...

	<u>2022</u>	<u>2021</u>	% Diff:
Business or other organization that provides products or services directly to tourists (e.g. hotel, restaurant, tour, outdoor activities)	91.43%	97.56%	-6.28%
Government organization (Municipal, Regional, Provincial or Federal)	2.86%	2.44%	2.44%
Organization, association, business or agency that supports tourism but does not provide services directly to tourists	2.86%	0.00%	2.44%
Other, please specify type of business	2.86%	0.00%	2.44%

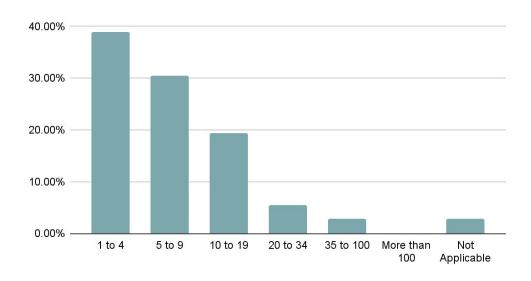
Q16. How many years has your organization been involved in the tourism industry?

	<u>2022</u>	<u>2021</u>	% Diff:
0 - 10 Years	34.29%	25.64%	33.73%
11 - 20 Years	8.57%	28.21%	-69.62%
21 - 30 Years	8.57%	17.95%	-52.25%
31 - 40 Years	0.00%	5.13%	-100.00%
40 + Years	42.86%	23.08%	85.73%
Don't Know/ Not Applicable	5.71%	4.88%	17.01%



Q17. How many employees do you and your organization employ during peak season? Please include both full-time and part-time employees and include the owner/operator

	<u>2022</u>	<u>2021</u>	% Diff:
1 to 4	38.89%	43.90%	-11.41%
5 to 9	30.56%	29.27%	4.41%
10 to 19	19.44%	17.07%	13.88%
20 to 34	5.56%	0.00%	0.00%
35 to 100	2.78%	4.88%	-43.03%
More than 100	0.00%	0.00%	0.00%
Not Applicable	2.78%	4.88%	0.00%





Q18. Please identify the tourism sector you primarily conduct business in.

	<u>2022</u>	<u>2021</u>	<u>% Diff:</u>
Accommodation	61.11%	75.61%	-19.18%
Attraction & Sightseeing	0.00%	2.44%	-100.00%
Food & Drink	2.78%	0.00%	0.00%
Arts, Culture & History	5.56%	2.44%	127.87%
Transportation	2.78%	0.00%	0.00%
Guided Activity Provider	0.00%	7.32%	-100.00%
Shopping	0.00%	0.00%	0.00%
Other: What kind of business are you?	27.78%	12.20%	127.70%

Family owned/operated guest ranch hosting the average family

We are a boutique luxury wilderness lodge. We are involved in accommodations, guided activities ,food and drink certainly, transportation of guests.

Wilderness destination all inclusive

Hunting

There is no primary business, it is a combination of food and drink, accommodation, guided activity and attraction and sightseeing

We are a business that changes lives , gives the guest an opportunity to see inside themselves and act accordingly

Destination world class fly fishing lodge

Campground

Guest ranch, trail rides

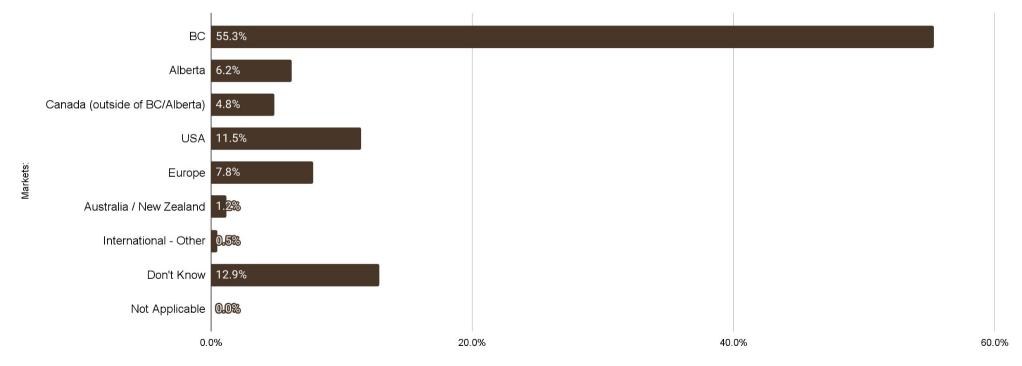
Full service fly in lodge providing a variety of activities.

Observation

There appears to be some differences how operators view themselves and how the region defines operators, specifically related to Guest Ranches or Lodges that don't see themselves as accommodation or attraction.

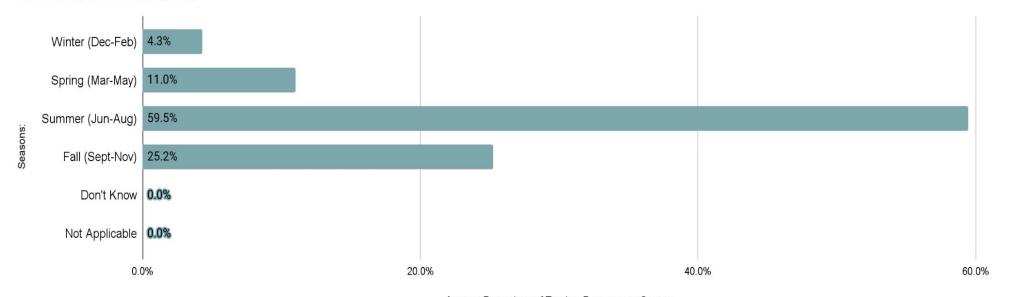


Q19. What percentage of tourists visiting your business in 2022 came from the following markets? Please fill in the percentage of all tourists that come from each market. The sum of all markets should equal 100%. Please type in '0' if you don't have tourists from a particular market. If you don't know, or this question is not applicable to you, fill the Don't Know or N/A box to 100.



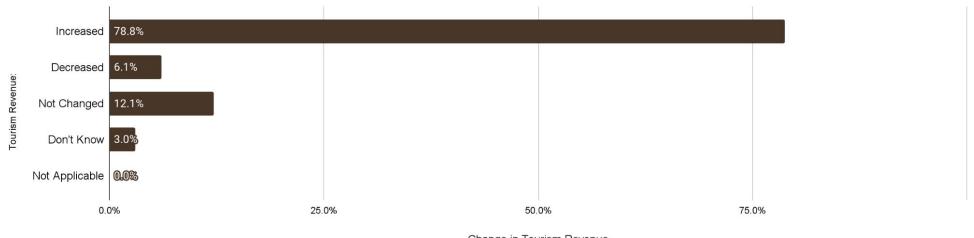


Q20. Thinking about your tourism revenue in 2022, approximately what percentage is generated from each season? Please fill in the percentage of all tourists that come from each season. The sum of all seasons should equal 100%. If you don't know, or this question is not applicable to you, fill either the Don't Know or N/A box to 100.



Average Percentage of Tourism Revenue per Season

Q21. In 2022 verses 2021, how has the tourism revenue to your business changed? Select one response.





Section 6: Moving Forward - The Future of Tourism in the Cariboo Chilcotin Coast



Q22. In your opinion, aside from a global pandemic, what are the top barriers to growth of the tourism industry within the Cariboo Chilcotin Coast? Please add up to three barriers.

Threat/history of fires

Fires, floods, highway access

The cost of operating a small business in these uncertain times! Wages, fuel, electricity, food costs and a workforce reluctant to become involved. There is not push-button jobs in the tourism industry, it is all mental and physical, brain and brawn you might say!

Resource extraction, loss of wild spaces & government waste

Real or perceived natural disaster threats such as wildfires. | Real or perceived transportation link disruptions affecting ferries and highways.

Government and inflation....oh did I mention government

Connecting flights from eastern USA to Williams lake. Entering Canada with old DUI.

Travel costs

Top barrier was wasting 10 minutes of my time getting through section 5??? 95% of our guests are from US, 2% BC, 3% Alberta

Winter. Road infrastructure. Emergency service response.

Shortage of campsites and accommodations in rural areas. | Not being able to offer year round jobs. | Accommodation rentals/rooms for staff members.

Labour shortages, food and gas increases

Cost of living, Road conditions & Fires

Our wilderness keeps getting swallowed by extractive industries. | Insurance costs make it untenable to host events.

Lack of awareness to the area and knowledge of the places and activities & forest Fires

Lack of trails (hiking & mountain biking/e-biking) and family attractions (pools, kids oriented science or history oriented activities, jungle gym type businesses...)

Lack of other activities/trails/attractions. Lack of awareness. Distance from Vancouver/interior (from guest pov"

Wildfires. Increasing insurance costs. Inflation affecting available money for travel.

Distance from populations. | Lack of alternative transportation options, including reliable air.

Too many restrictions for small businesses especially in remote areas

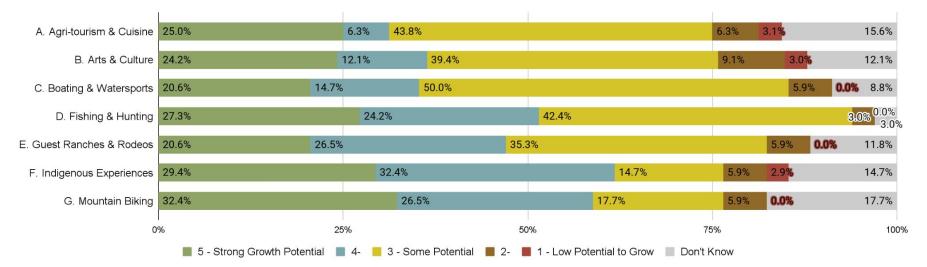
Wildfire threats, insurance costs/interest rates and substantially rising operating costs. Also cost of gas is making less people RV.

Global competition with similar product

The government, affordable flights and airlines, staff.



Q23. How much growth potential do you think each of the following tourism products and/or experiences have within the Cariboo Chilcotin Coast?



Q23A. Agri-tourism & Cuisine

Q23B. Arts & Culture

Q23C. Boating & Watersports

Q23D. Fishing & Hunting

Q23E. Guest Ranches & Rodeos

Q23F. Indigenous Experiences

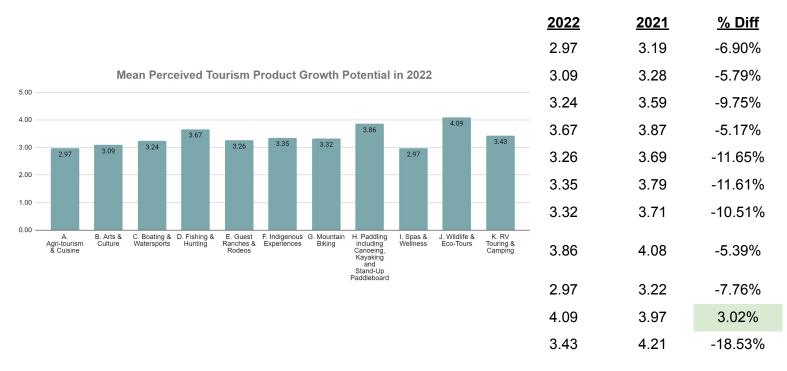
Q23G. Mountain Biking

Q23H. Paddling including Canoeing, Kayaking & Stand-Up Paddleboard

Q23I. Spas & Wellness

Q23J. Wildlife & Eco-Tours

Q23K. RV Touring & Camping





Q24. Are there other (than those listed above) products and/or tourism experiences you think have a strong potential for growth within the Cariboo Chilcotin Coast?

In our area I'm feeling we are pretty much 'max'd' out?

"Cultural tourism, indigenous culture"

Yes, but would like to keep that quiet.....let's not screw up our wilderness anymore....PLEASE

Language learning opportunities on a working ranch, campground or any other tourism related operation. | Back to nature tourism, green space exploration, get to know plants, types of trees | How to survive in the bush | Guided hiking tours | Create heavens for overstressed people so they can find a place to slow down, get disconnected from their phones and reconnect with themselves.

Photography classes

Trail system tours & trail rides

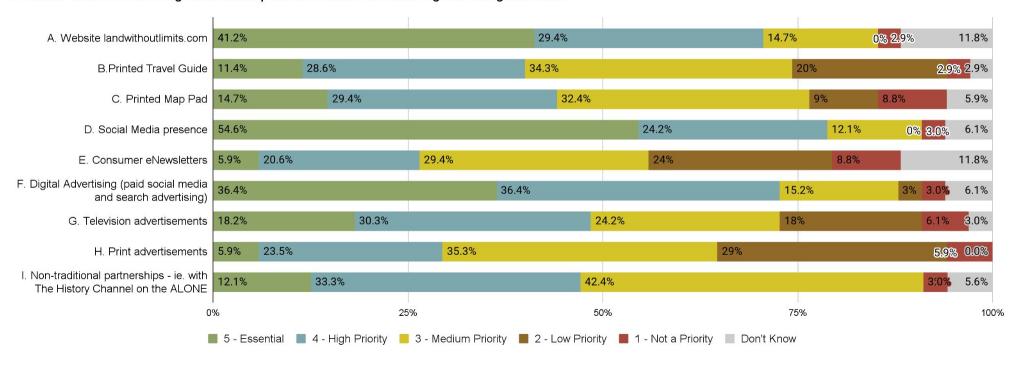
Skiing and winter sports. Small business events

Paranormal tourism 6

I understand the BC tourism had a big marketing campaign in Australia. It would have been nice to know this as I could have piggy backed with their campaign with my own campaign. I have a lot of clients from Australia that specifically come to stay with us. Since BC created awareness, I could have given them a nice option to come to.



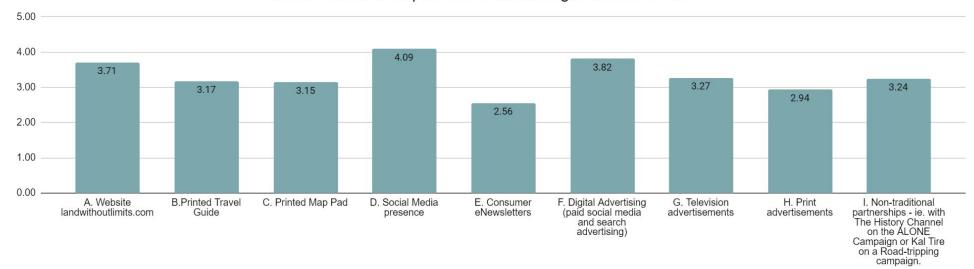
Q25. The primary mandate of the Cariboo Chilcotin Coast Tourism Marketing Association is to market and promote the Cariboo Chilcotin Coast to visitors. To do so, the Association considers a wide range of tactical marketing and promotional activities. In your opinion, in the future, how much of a priority should the Cariboo Chilcotin Tourism Marketing Association place on each of the following marketing activities?





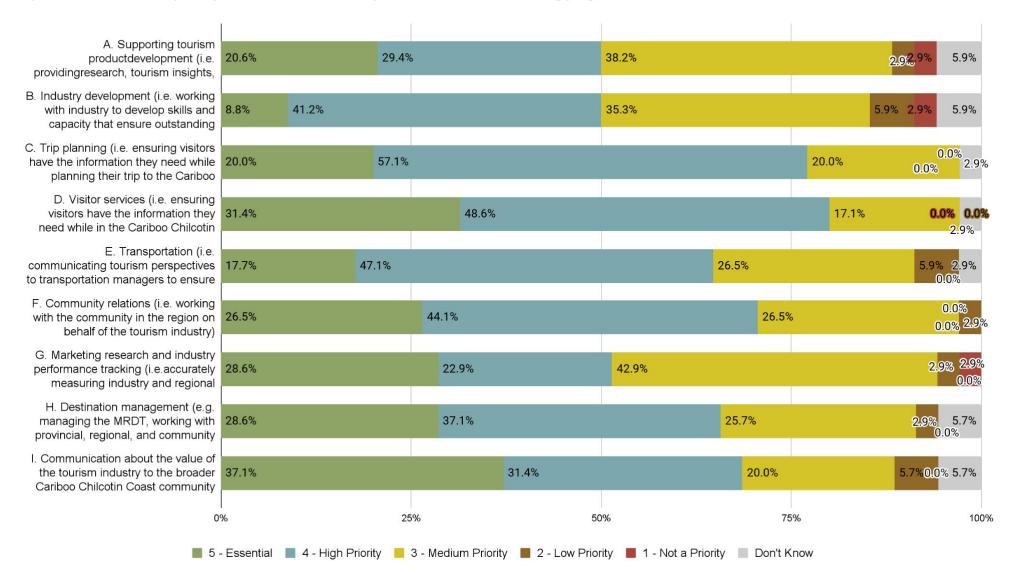
	<u> 2022</u>	<u>2021</u>	% Diff
Q25A. Website landwithoutlimits.com	3.71	3.96	-6.31%
Q25B. Printed Travel Guide	3.17	3.58	-11.45%
Q25C. Printed Map Pad	3.15	3.7	-14.86%
Q25D. Social Media presence	4.09	4.24	-3.54%
Q25E. Consumer eNewsletters	2.56	3.14	-18.47%
Q25F. Digital Advertising (paid social media and search advertising)	3.82	4.11	-7.06%
Q25G. Television advertisements	3.27	3.29	-0.61%
Q25H. Print advertisements	2.94	2.92	0.68%
Q25I. Non-traditional partnerships - ie. with The History Channel on the ALONE Campaign or Kal Tire on a Road-tripping campaign.	3.24	3.47	-6.63%

Mean Perceived Importance of Marketing Activities in 2022





Q26. Destination marketing organizations take on a wide range of activities outside of marketing and promotion to help grow tourism in communities. As described earlier, this survey will be used to assist in the Cariboo Chilcotin Coast Tourism Marketing Association's strategic planning. In your opinion, how much of a priority should the Association place on each of the following program areas?





The table below summarizes the mean scores (average of 5) of the stakeholder perceived importance of the following activities to the Cariboo Chilcotin Coast Tourism Marketing Association.

	<u>2022</u>	<u>2021</u>	% Diff:
Q26A. Supporting tourism product development (i.e. providing research, tourism insights, and/or by identifying opportunities)	3.44	3.61	-4.74%
Q26B. Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding tourism experiences)	3.29	3.63	-9.37%
Q26C. Trip planning (i.e. ensuring visitors have the information they need while planning their trip to the Cariboo Chilcotin Coast)	3.89	4.11	-5.35%
Q26D. Visitor services (i.e. ensuring visitors have the information they need while in the Cariboo Chilcotin Coast)	4.03	4.14	-2.66%
Q26E. Transportation (i.e. communicating tourism perspectives to transportation managers to ensures smooth flow of people to/within the Cariboo Chilcotin Coast)	3.68	3.68	0.00%
Q26F. Community relations (i.e.working with the community in the region on behalf of the tourism industry)	3.94	3.97	-0.76%
Q26G. Marketing research and industry performance tracking (i.e.accurately measuring industry and regional performance)	3.71	3.69	0.54%
Q26H. Destination management (e.g.managing the MRDT, working with provincial, regional, and community organizations to advance tourism)	3.74	3.97	-5.79%
Q26I. Communication about the value of the tourism industry to the broader Cariboo Chilcotin Coast community	3.83	3.83	0.00%



Q27. The last word is yours - Are there any additional comments you would like to make?

Gold Rush Trail excellent publication. Route plans that identify resorts and activities/events along the way so you get a great experience and not miss out on events or resorts as you travel your route

I'm good! Thank you for providing the opportunity!

Would like to see the annual 'guide' become more than the current storybook souvenir format.

I travel all of BC for Rep Hockey, 50,000km this year. Never once in any of my travels have I seen any advertising about the cariboo....never

I stated the issues with the MRDT earlier. I don't think it should be charged to guide outfitting organizations, as it is not CCCTMA mandate to promote this.

All good, thanks

Please reach out to unique tourism operators that are sensitive to over exposure, support us in regulations that will protect our waters & not over expose areas that are sensitive to not being able to remain "Wilderness experiences" because of "Overexposed". We have capacity to accommodate three fold of the fly fishers that we book (140+ five day trips for 2023) but cap our trips @ 10 anglers per week. enough said, thank you, Skeed & Sharon....54 years in this area:)

I would like to thank all of the CCCTMA for their dedication and support they provide us with throughout the year and for all the services and opportunities you are providing us with. We do appreciate it but sometimes it is just hard to communicate or respond as we are getting swamped with emails, surveys and besides that, we also need to do work everywhere we are needed. Thanks again for everything!

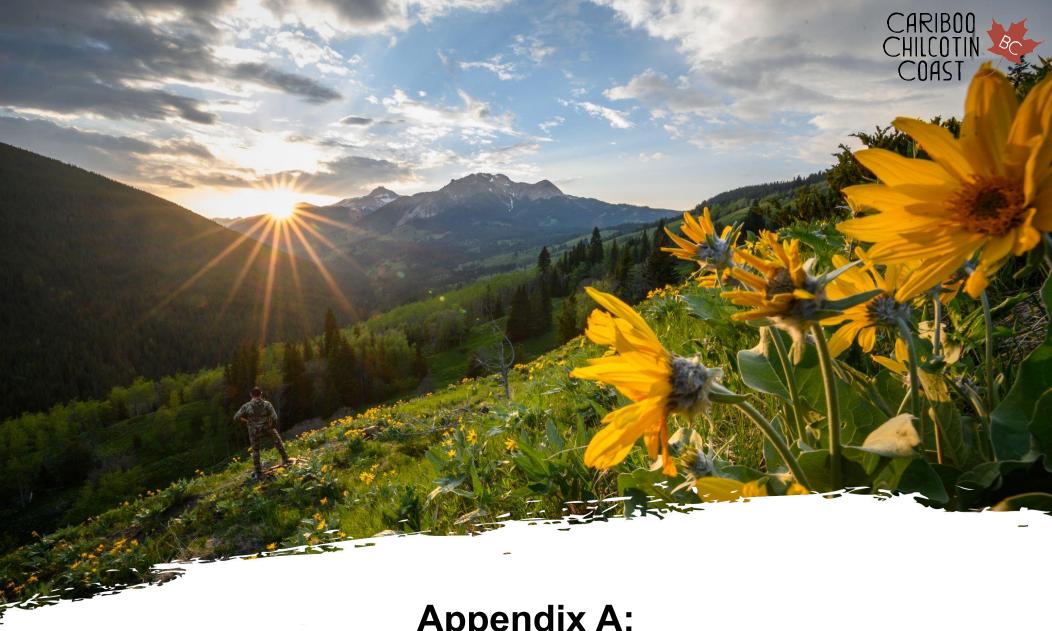
Would love a bus transportation from the lower mainland...

On behalf of Crooked Lake Resort we would like to thank everyone for being transparent with tourism. Keep up the great work. We really appreciate it. Cheers Kim an Al

we're at a critical juncture as a resort in the south cariboo. 2023 will determine whether we continue in the tourism sector or shut down operations to short term rentals and rent out our accommodations to long term renters (becoming landlords instead of resort owners)

Thanks for all your hard work. There is a trend of smaller operators beginning to scale back growth plans, beginning to sub-divide properties and thinking about exit strategies because of the high cost of everything (being compounded by unfortunate pandemic/wildfire years). Or at least we are seeing this is the resort community. Insurance for our property is up to \$32,000 a year for basic fire and liability coverage. Property tax is almost \$10,000. Basic operating costs now for our property are almost \$100,000 when you factor in mortgage and all other operating costs. This has doubled since we took over 4 years ago and is high for a small seasonal operator. Just trying to be super transparent. Our RV infrastructure is dying... and needs to be updated, but it financially does not make sense to do the investment at this time. So we may have to scale back our operations moving forward too. It's interesting times for everyone, but if we are hit by another year that kills our main season it will be catastrophic for businesses. So we are just thinking survival this year, as I know others are. Which sucks, because advertising dollars take a hit. Not sure what the answer is, but this will likely be a trend you start to see. We appreciate you promoting the area for sure. Hoping for a great 2023!

Does any one pay attention to the traffic that all the bc websites get? Mostly it is local. Isn't a part of this to try and attract people outside of BC?



Appendix A:
Background, Research
Objectives & Methodology

Appendix A Background, Research Objectives & Methodology



Background

The Municipal and Regional District Tax (MRDT) was introduced in the Cariboo Chilcotin Coast in May 2018 to provide funding for local tourism marketing, programs, and projects. The MRDT is applied to sales of short term accommodation provided in select areas of the Cariboo Chilcotin Coast and jointly administered by the Minister of Finance; the Ministry of Tourism, Arts and Culture; and Destination British Columbia (DBC).

This is the summary of the "2023 Cariboo Chilcotin Coast Tourism Marketing Association Stakeholder Survey of 2022 Programs"

Research Objectives

- 1. Assess the level of awareness of tourism marketing activities of the Cariboo Chilcotin Coast Tourism Marketing Association
- 2. Assess the level of satisfaction with the use of MRDT funds

Methodology:

Population and Survey Administration

The "2023 Cariboo Chilcotin Coast Tourism Marketing Association Stakeholder Survey" was sent to 153 stakeholders in the Cariboo Chilcotin Coast MRDT Collecting Partners database.

The online survey was conducted between March 1, 2023 and March 22, 2023. The initial survey was sent March 1, 2023 and four reminders were sent March 08, 2023, March 15, 2023, March 17, 2023 & March 20, 2023. The survey closed on March 22, 2022. A total of 53 completions were received for a 34% response rate.

Reporting

Descriptive statistics were used to analyze and summarize the results in this report. All quantitative questions include a five point response scale with '1' ratings being 'not familiar/strongly disagree/very dissatisfied/ and '5' ratings being 'very familiar/strongly agree/very satisfied. 'Don't know / Not relevant' answers have been excluded from the analysis for all questions.

Open ended question responses have been accumulated and grouped by theme.

Reporting conducted & compiled by The Web Advisors. For further information or questions, please contact:

Chris Elder
Managing Director
chris@thewebadvisors.ca
250-889-0973