



Cariboo Chilcotin Coast MRDT Program 2024 Stakeholder Satisfaction Survey Results & Analysis of 2023 Programs

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June 6, 2024

Cariboo Chilcotin Coast MRDT Program 2024 Stakeholder Survey (of 2023 Programs)

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Executive Summary:

1. 348 stakeholders were invited to complete the survey. 87 surveys were completed for a 25% response rate. This is an increase of 34 more surveys completed over the previous year.
2. **Section 1: Mean scores on Familiarity and Awareness of the CCCTMA** decreased on 8 out of 13 questions. While the mean scores dipped, it should be noted overall, 73% of survey respondents were either Very Familiar or Familiar with CCCTMA, and 67% believe the CCCTMA are leaders in consumer marketing. Notable changes within the survey responses:
 - a. Overall Familiarity with CCCTMA score increased 7% with a mean score 4.01 vs 3.74 last year. There are also notable increases in connectivity with partners seen in questions related to awareness of MRDT collection area representative and awareness of the AGM, along with an overall awareness of the CCCTMA.
 - b. There are notable decreases in awareness about the free, direct booking capabilities on book.landwithoutlimits.com offering referrals or integration with Property Management System, awareness of advertising opportunities in the annual Travel Guide and Map Pad, and awareness of advertising opportunities in the social media advertising partnership program and eNewsletters.
3. **Section 2: Mean scores on Satisfaction of the CCCTMA's Programs and Activities** increased on 6 of 12 questions. A significant increase in satisfaction was reported on Increasing funding to enable an increase in destination development and marketing activities, as well as Implementing research and performance monitoring and evaluation to guide business decision making and Delivering targeted brand campaigns to drive increased room occupancy and rates.
4. **Section 3: Mean scores on Overall Satisfaction of the CCCTMA** remained very similar to the previous year, with mean scores on 5 of 7 questions changing less than 1%. More respondents noting Don't Know/Not Applicable or Neutral on responses, indicating opportunities for increased awareness/engagement with stakeholders. The most notable difference is a 7% decrease in satisfaction on Providing referral website traffic/leads to your business.
5. **Section 4: Mean scores on the CCCTMA striving to be an inclusive, industry-driven organization** increased on 7 of 8 questions, with the CCCTMA's understanding of a stakeholder's business/organizational needs remaining the same mean score. Increases in scoring appears to be related to respondents awareness of initiatives and CCCTMA engagement with stakeholders. The most notable increases include The CCCTMA focused on leveraging and aligning with Destination BC tourism partner opportunities, The CCCTMA has knowledgeable team members who are current on market changes and issues impacting tourism, and The CCCTMA addresses questions and/or concerns in an effective and timely manner.

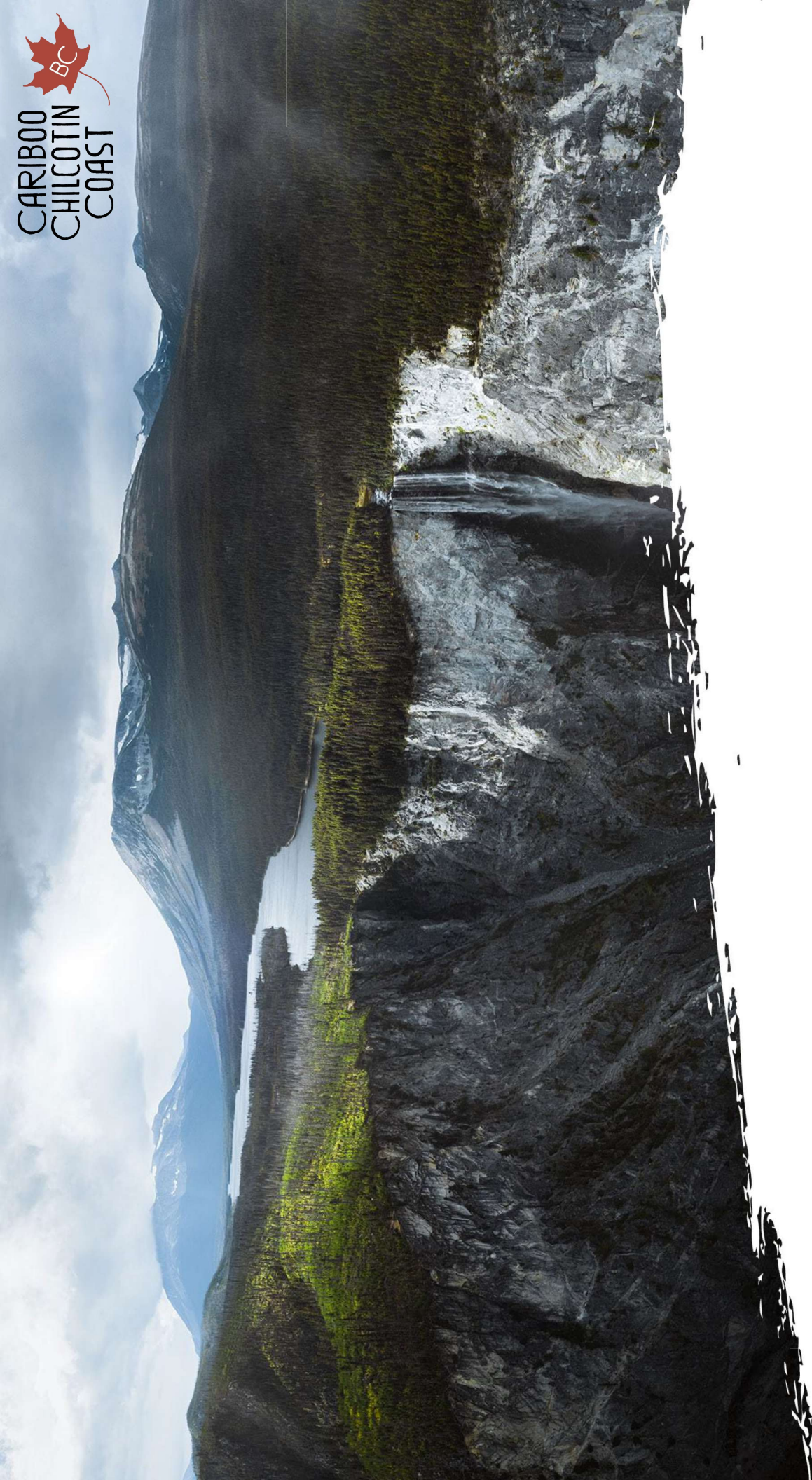
Executive Summary (continued)

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

- a. 66% of **respondents** identified as Accommodation providers (a decrease of 28% in respondents), 12.5% identified as “Other” (increase of 331%). Arts & Culture related businesses as well as multi-service (accommodation, experience, ranch) options are noted in Other.
- b. **Tourism Market Percentages** (in 2023): BC 55%, USA 20%, Europe 13%, AB 7%, Canada Other 6%, Aust/NZ 3%, Int’l Other 5%, Don’t know 40%. These percentages demonstrate a greater return of some US and international travel
- c. **Tourism Revenue Seasonal Percentages** (in 2023): Spring 15%, Summer 52%, Fall 24%, Winter 12%. Notable increase in Winter travel and a slight decrease in Summer.
- d. **Tourism revenue changes in 2023 vs 2022** - revenue increased for 52% of businesses, decreased for 8% of businesses, was same as 2022 for 18% of respondents.

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

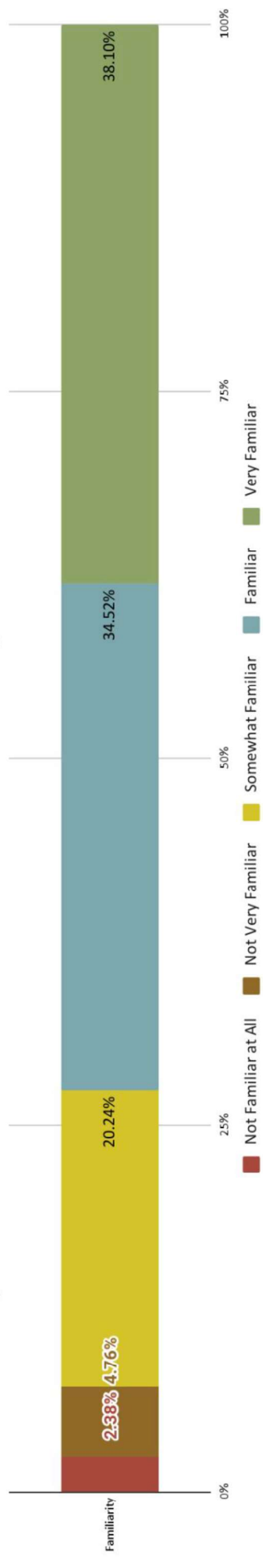
- a. The **top 3 barriers to growth** for tourism in region have been identified as Wildfires / Climate Concerns, Increased Costs / Economic Concerns, and Distance / Transportation. Qualitative responses can be found pages 37-39.
- b. The **top 3 tourism products** identified for future growth potential are: Indigenous Experiences, Wildlife & Eco-Tours, and RV Touring & Camping,
- c. The **top 3 marketing activities** of perceived importance are: Social Media Presence, Website: LandWithoutLimits.com, and Digital Advertising
- d. The **top 3 non-promotional marketing activities** of perceived importance are: Destination Management, Visitor Services, and Industry Development.
- e. **Notable Last words** on page 38
 - i. Operators are struggling with ever increasing costs, which is a huge threat to the sector if these businesses start to sell and shut down. Work with government on more grants for this sector (versus loans). No one can take on more debt at this point. Thank you!
 - ii. The CCCTA has always been there when I've required their services and I appreciate the time and efforts they put into keeping our area in the public's eye!!
 - iii. We are very pleased with all the work that has been done and look forward to a very prosperous 2024!
 - iv. The CCCTA should work to ensure that tourism stakeholders understand the CCCTA's role in the tourism landscape. While the regional nature of the CCCTA has benefits, there are also challenges in terms of communities feeling well represented.
 - v. Little is known about the CCCTMA or even what MRDT is. Most, outside of the accommodators, have any knowledge of this funding or even care. What they need to know is how it best works for their business.



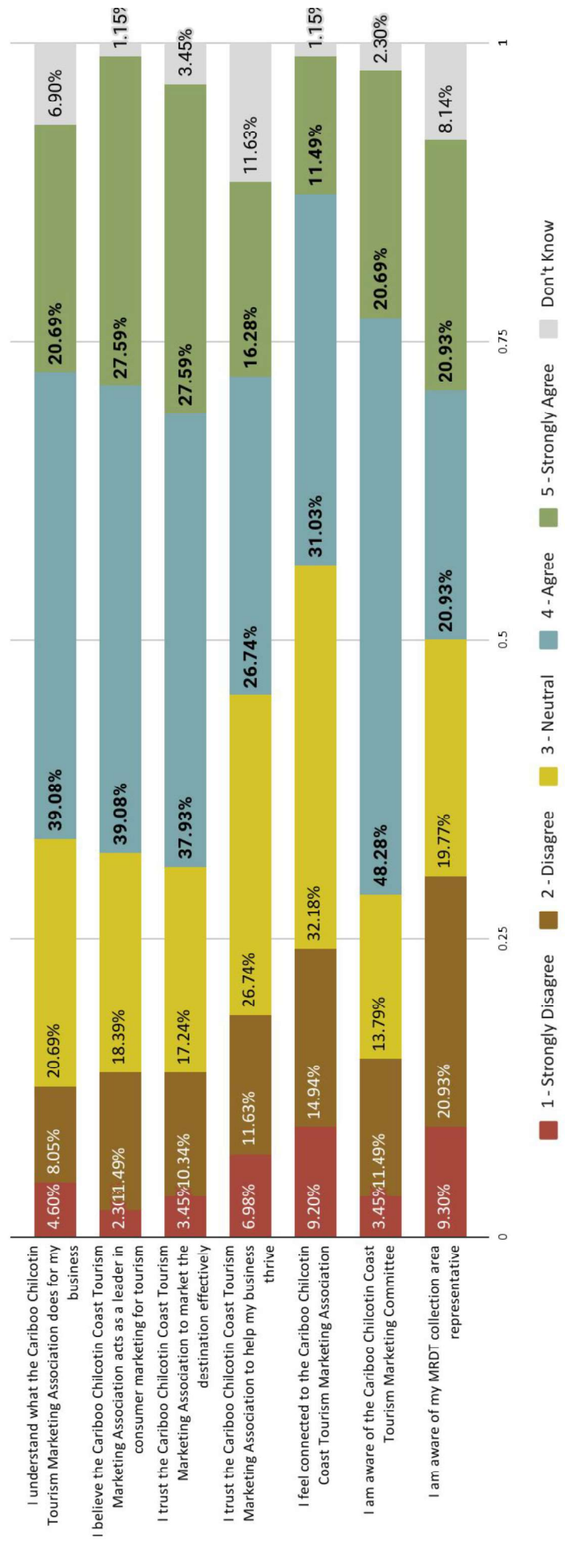
Section 1: Familiarity & Awareness of the Cariboo Chilcotin Coast Tourism Marketing Association

Section 1: Familiarity & Awareness

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



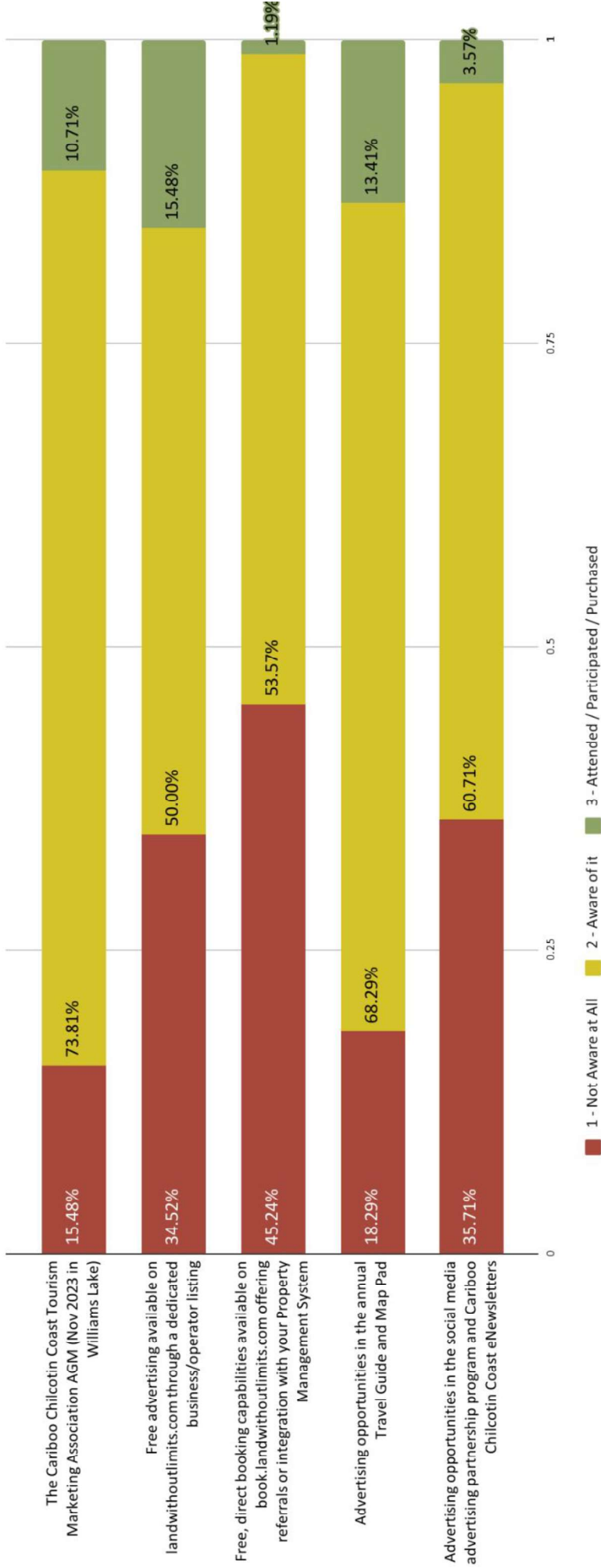
Q2. On a scale of 1 to 5, where 1 is 'Strongly Disagree' and 5 is 'Strongly Agree,' please rate your level of agreement with the following statements about the Cariboo Chilcotin Coast Tourism Marketing Association



Section 1: Familiarity & Awareness



Q3. 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?



Section 1: Familiarity & Awareness

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

	<u>2023</u>	<u>2022</u>	<u>% Diff:</u>
Q1. Familiarity with The Cariboo Chilcotin Coast Tourism Marketing Association	4.01	3.74	7.2%
Q2A. I understand what the Cariboo Chilcotin Tourism Marketing Association does for my business	3.67	3.79	-3.2%
Q2B. I believe the Cariboo Chilcotin Coast Tourism Marketing Association acts as a leader in consumer marketing for tourism	3.79	3.92	-3.3%
Q2C. I trust the Cariboo Chilcotin Coast Tourism Marketing Association to market the destination effectively	3.79	3.75	1.1%
Q2D. I trust the Cariboo Chilcotin Coast Tourism Marketing Association to help my business thrive	3.38	3.45	-2%
Q2E. I feel connected to the Cariboo Chilcotin Coast Tourism Marketing Association	3.21	3.42	-6.1%
Q2F. I am aware of the Cariboo Chilcotin Coast Tourism Marketing Committee	3.73	3.57	4.5%
Q2G. I am aware of my MRDT collection area representative	3.25	3.02	7.6%
Q3A. The Cariboo Chilcotin Coast Tourism Marketing Association AGM (Nov 2022 in 100 Mile House)	2.9	2.53	14.6%
Q3B. Free advertising available on landwithoutlimits.com through a dedicated business listing	2.62	2.69	-2.6%
Q3C. Free, direct booking capabilities available on book.landwithoutlimits.com offering referrals or integration with your Property Management System	2.12	3.55	-40.3%
Q3D. Advertising opportunities in the annual Travel Guide and Map Pad	2.9	3.43	-15.5%
Q3E. New advertising opportunities in the social media advertising partnership program and Cariboo Chilcotin Coast eNewsletters	2.36	2.65	-10.9%

Section 1: Familiarity & Awareness

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

I would appreciate transparency, communication and open information sharing to more the the inside circle folks.

Perhaps off this topic but as a locally elected official, I appreciate being kept in the information loop thanks.

I would love more networking opportunities, as well as perhaps some more education surrounding social media and working with content creators/media companies - this would help encourage tourism providers to invest in photo/video/influencer marketing and not only would it help my specific business, but it would help our whole region grow.

More networking and working with other Indigenous owned/lead companies

Lobby the Regional District to streamline the land rezoning process

More travel/trade show opportunities.

Succession of your tourism business to your children with the least amount of complications

Answers to specific issues that concern tourist businesses, e.g. insurance, signage, shopping tips for specific tourist needs, e.g. merchandise items, equipment

Support new business.

focused marketing / networking opportunities... for example Indigenous and heritage related

I am happy with the topics and opportunities that considered now.

Puddle is more like old style Community- People like Facebook info more than anything. (My readings)

More email outs perhaps to let tourism operators know what's going on? I don't think I receive too much from the CTA

Holistic overview of all tourism marketing programs provincially and nationally.

International markets and fly in operators. Not just in house markets and road traffic.

Hands on technical updating of websites, google business forum, meta, etc. Current courses tell you how to do it but I am not aware of any that actually show you how to do it. When you try to do it according to instructions its very confusing and frustrating.

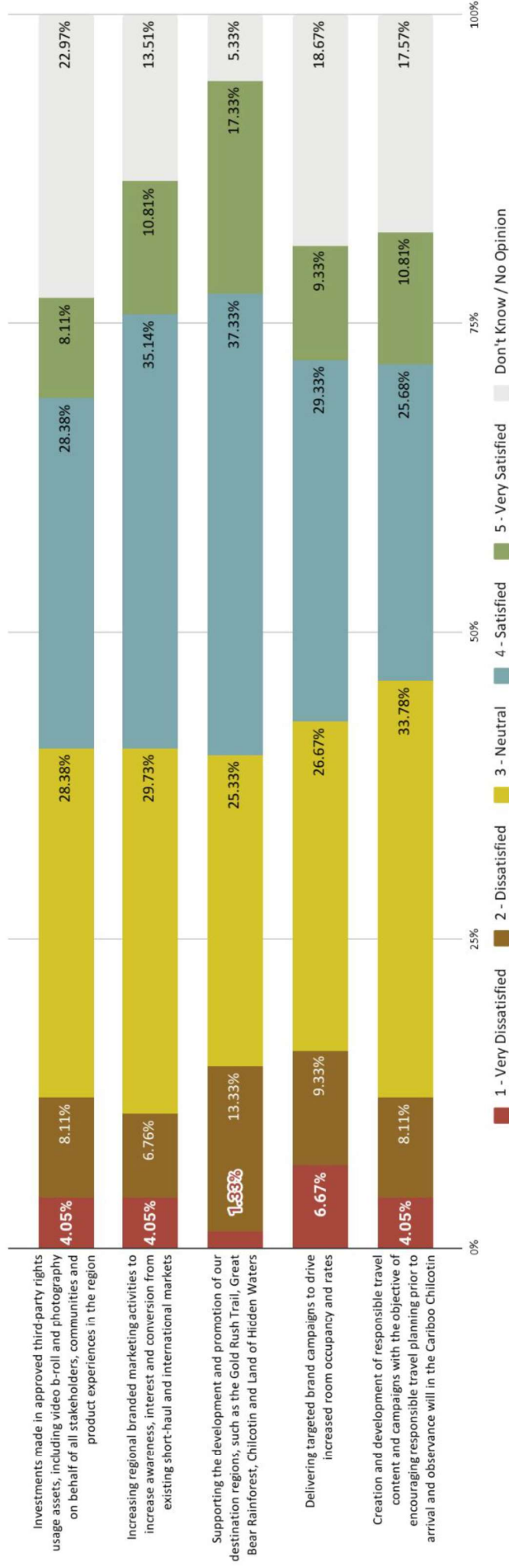
From the educational perspective helping the operators to use social media in an effective way. Helping the operators to understand way to market during high season and low season. Working in partnership with Visitor Centres to host networking opportunity with stakeholders in the area.



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

Section 2: Satisfaction with Programs & Activities

Q5. Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's Marketing Programs and Activities



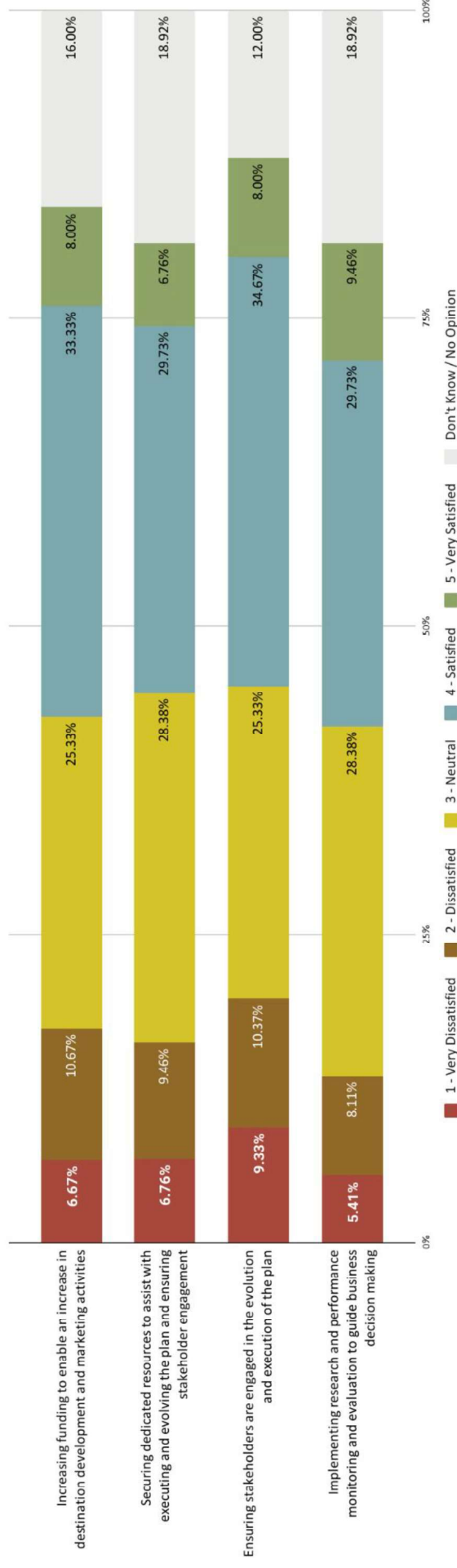
Section 2: Satisfaction with Programs & Activities

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>2023</u>	<u>2022</u>	<u>% Diff:</u>
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	3.38	3.26	3.7%
Q5B. Increasing regional marketing activities to increase awareness, interest & conversion from existing short-haul & international markets	3.48	3.39	2.7%
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	3.59	3.66	-1.9%
Q5D. Delivering targeted brand campaigns to drive increased room occupancy and rates	3.31	3.05	8.5%
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	3.37	3.14	7.3%

Section 2: Satisfaction with Programs & Activities

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

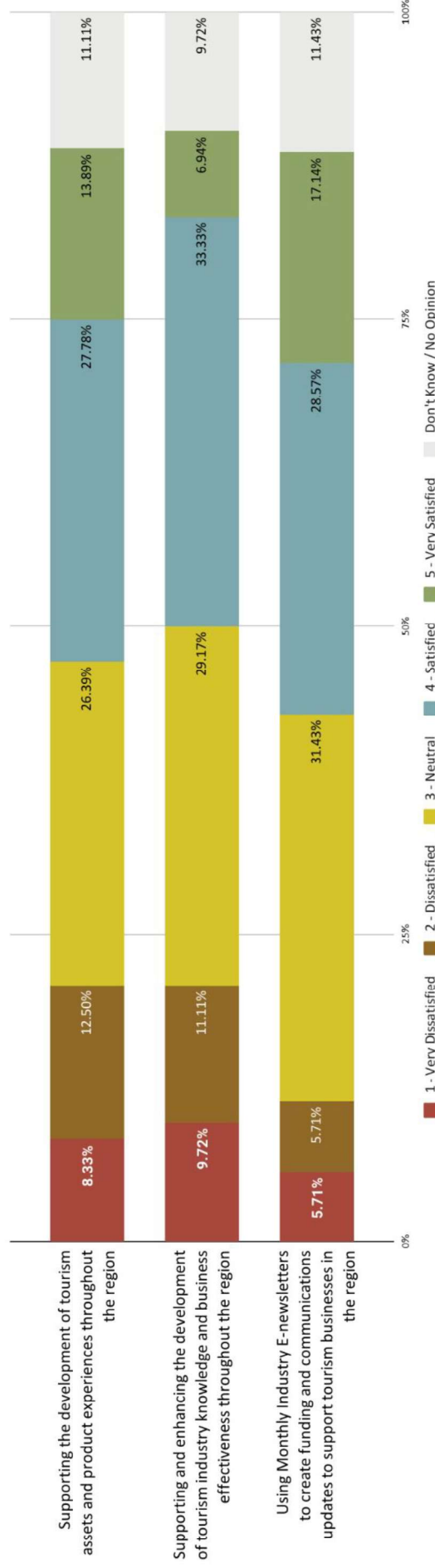


The table below summarizes the mean scores (average of 5) of all statements regarding the satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's tourism management.

	2023	2022	% Diff:
Q6A. Increasing funding to enable an increase in destination development and marketing activities	3.33	3.00	10%
Q6B. Securing dedicated resources to assist with executing and evolving the plan and ensuring stakeholder engagement	3.25	3.26	-0.3%
Q6C. Ensuring stakeholders are engaged in the evolution and execution of the plan	2.93	3.26	-10.1%
Q6D. Implementing research and performance monitoring and evaluation to guide business decision making	3.36	3.00	12.0%

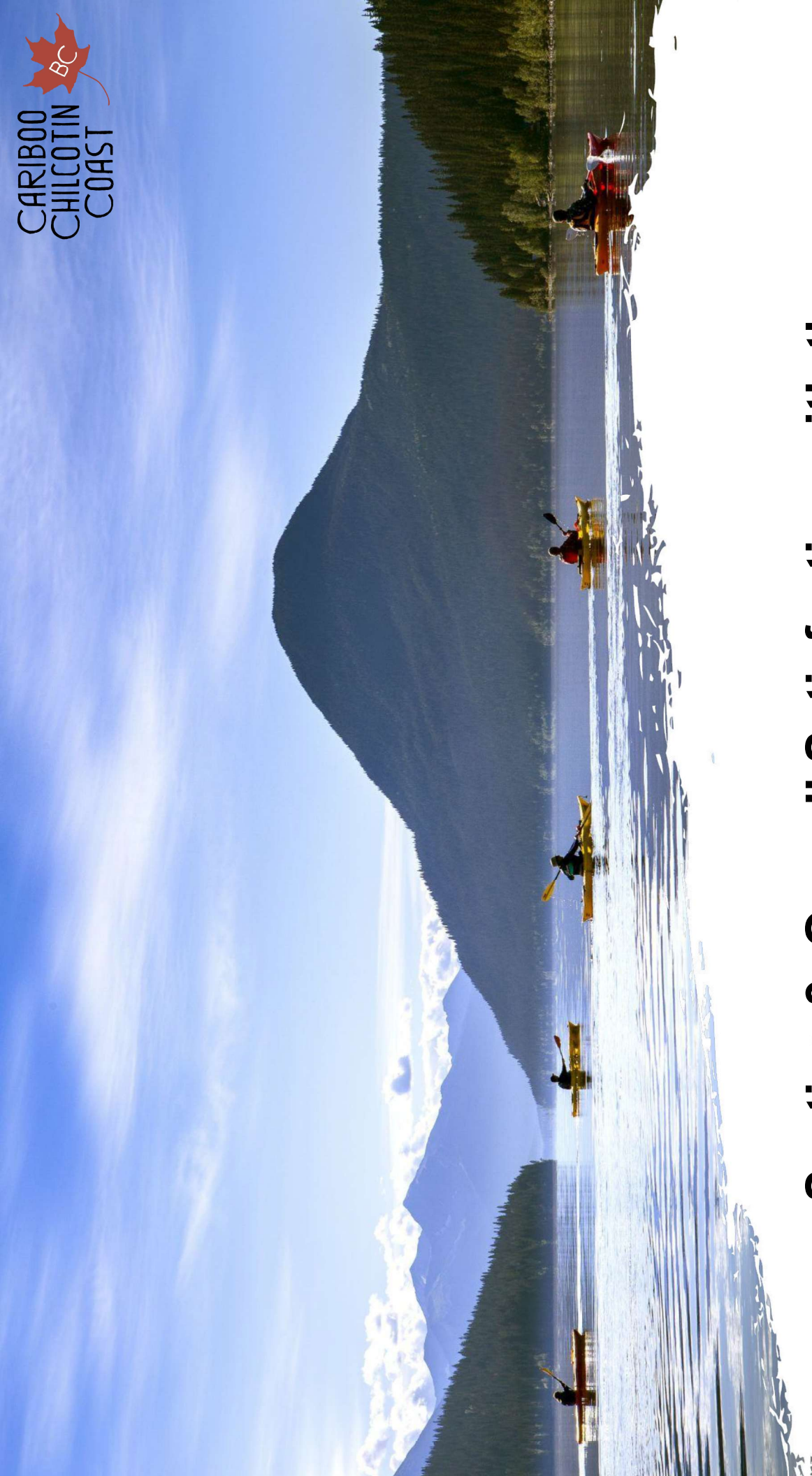
Section 2: Satisfaction with Programs & Activities

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



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.

	2023	2022	% Diff:
Q7A. Supporting the development of tourism assets and product experiences throughout the region	3.3	3.51	-6%
Q7B. Supporting and enhancing the development of tourism industry knowledge and business effectiveness throughout the region	3.14	3.55	-11.5%
Q7C. Using Monthly Industry E-newsletters to create funding and communications updates to support tourism businesses in the region	3.52	3.63	-3%

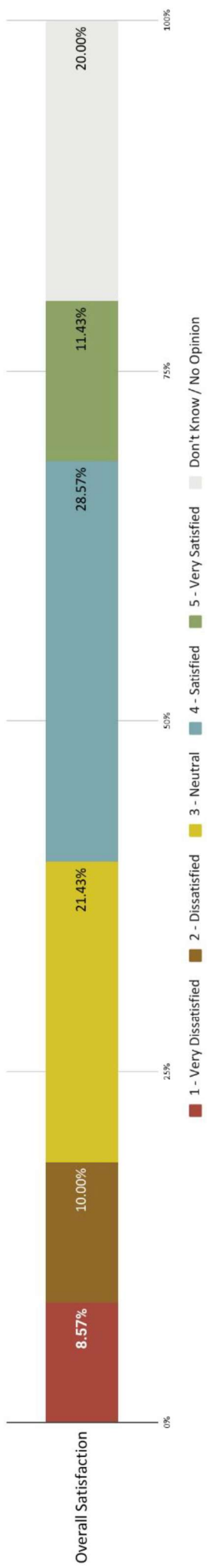


Section 3: Overall Satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association

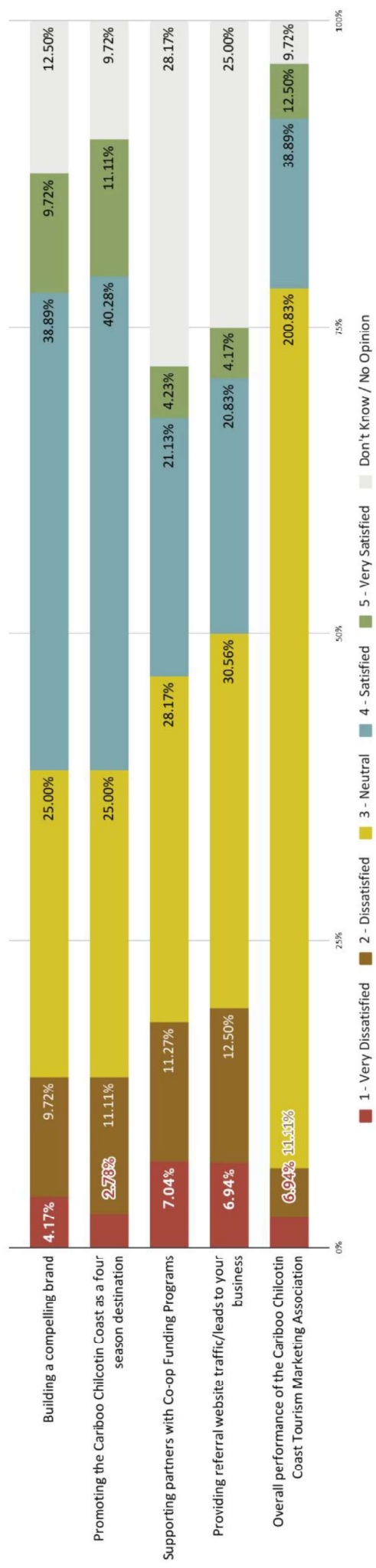
Section 3: Overall Satisfaction



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



Q9. In the past year, what was your level of satisfaction with the following services provided by the Cariboo Chilcotin Coast Tourism Marketing Association?



Section 3: Overall Satisfaction

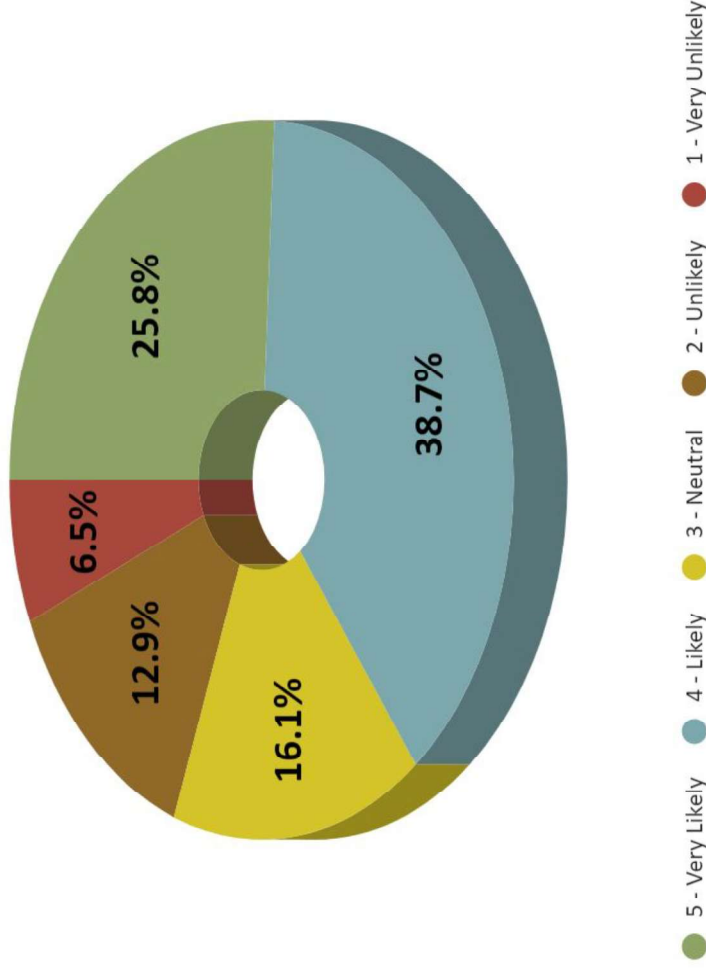


The table below summarizes the mean scores (average of 5) of all statements regarding overall satisfaction with the services provided by the Cariboo Chilcotin Coast Tourism Marketing Association.

	<u>2023</u>	<u>2022</u>	<u>% Diff:</u>
Q8. Overall, how would you rate your satisfaction with the Cariboo Chilcotin Coast Tourism Marketing Association's use of MRDT funds?	3.30	3.30	0%
Q9A. Building a compelling brand	3.46	3.43	0.9%
Q9B. Promoting the Cariboo Chilcotin Coast as a four season destination	3.51	3.65	-3.8%
Q9C. Supporting partners with Co-op Funding Programs	3.06	3.05	0.3%
Q9D. Providing referral website traffic/leads to your business	3.04	3.27	-7%
Q9E. How satisfied were you with the overall performance of the Cariboo Chilcotin Coast Tourism Marketing Association	3.43	3.43	0%

Section 3: Overall Satisfaction

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>2023</u>	<u>2022</u>	<u>% Diff:</u>
59.7%	62.61%	-2.91%

Section 3: Overall Satisfaction

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 questions were not answered in a good way. When I made inquiry as to where the MRDT funds are and how can they help my business I was not informed in any way that made sense. The last benefits we received was the professional photographer which worked well for us. Other than that nothing. I made inquiry about online booking system and was not even informed about that. The marketing offered is more than we can afford especially coming out of covid and fires. It costs us to operate. We feel invisible	
Communication with representatives. Opportunities to collaborate.	
Yes, many. Long list of complaints that have been submitted to the organization over the years, none of which have been addressed or responded to. Told "someone will get back to you" - they never do	
None of the accommodation providers in our area are engaged with CCTMA. Huge disconnect between what they offer and what is being promoted.	
We are just getting to know the team, and are always happy with the connections!	
Lack of understanding around where out MRDT expenses are going	
Too top heavy	
Various questions to the responsible destination and experience manager still needed to be answered.	
Not really... but having said that, I am not a tourism-related business owner, but rather an interested local government representative.	
Yes, during the past 6 years I cannot name one guest who visited our Lodge from CCTMA initiatives.	
I am aware that the organization has been actively rebuilding its team and expanding capacity and look forward to engaging at a deeper level over the next 12 months.	
Tidal Waters Fishing Lodges are neglected	
I heard that the CCTMA only has now a few committee members, I think 5 and I don't like that to see as this bring not enough diversity to the table I find. When we started I think we had 12 and all were business owners. We need to get those folks back to the table!	

Section 3: Overall Satisfaction

CONTD. 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?

We are unaware of any of these marketing campaigns. I don't believe our business has been promoted or supported by the CTA for several years now. Unfortunately I can't say too much good since there is no relationship

I started this position 6 months ago and just now am figuring out who and what they do.

Communication; engagement with the business community; response time to funding applications; amount of funding availability; focus on Lillooet and Great Bear Rainforest overshadows all other areas of the region on social media.

I am not satisfied with any of it. As far as I am concerned the MRDT tax is a waste of money. I can do a better job of promoting my business than they do.

Communications have significantly improved in the past few months. More detailed and frequent progress reports and results of new and ongoing programs would help stakeholders to be more engaged and ultimately more supportive of CCCTA's marketing plans and endeavours. I know keeping stakeholders engaged has always been a challenge as they are busy running their businesses.

We participated in the MRDT funding program and were awarded funding but the process was not clearly outlined and it was a nightmare to get a reply.

Our first visit by a destination manager did not happen until last month.

Simply don't know what you are doing. Most of the questions the response is "Don't know". Don't know the difference between CCCT and CCCTMA.

I strongly disagree with MRDT matching funding program. We as an association wanted to start a project and asked for MRDT money. As we are a small not-for-profit organization, we didn't have enough funds to match. Our contribution would be our work ours. Our application was turned down.

CCCT tends to market towards the rubber tire trade. We are a destination product that requires more lead time. We have not received many, or any inquiries from any of the trade/wholesaler driven initiatives

Marketing of region, working in partnerships, funding available to market your community.

Section 3: Overall Satisfaction

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 are open to any and all suggestions that will help us to market, to operate, to perform site improvements, to reduce operational costs in this area. Basics!

Yes. If phone calls had been returned a discussion about how the CCCTA could assist in the effort to allow tourism, hospitality and service businesses access peak season staff.

Yes, many. Long list of complaints that have been submitted to the organization over the years, none of which have been addressed or responded to. Told "someone will get back to you" - they never do

Direct digital assistance from a hands-on assistant to update our personal websites, and better integrate analytics.

Wish we could be included in marketing but unfortunately we are not in the MRDT catchment.

CCCTMA too focused on room bookings, while no rooms will be booked without destination development.

More emphasis on hiring professionals to help with photo and video projects, a database of "preferred vendors" for such projects, and an emphasis on content creator partnerships to show off the region.

More involvement in video content.

Partnerships with insurance providers. Resorts facing crazy insurance increases.

More granting to run marketing campaigns developed by people living and working in the areas they are trying to promote.

Succession of your business without interruptions

Are there any grants available to help me curate my entire image bank of the CCC region (I have the largest image bank on the region) and produce marketing products for iconic areas? I would like to talk further with Troe about this. Thanks

Support in individual tourism questions that others have already answered ensures a better exchange among the members; not everyone has to reinvent the wheel!

Section 3: Overall Satisfaction

CONTD. 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?

Strengthen MRDT participation and resultant tourism marketing in my area. If I told you my area, and if you haven't figured it out already, you would know who I am (lol)
I tried, put a plan together which included other stakeholders and still not good enough.
We don't market BC, AB, WA, ID not MT so we do not spoil this unique wilderness area, which has happened in the SE of BC due to Over Exposure.
Broaden the online reservation platforms, so we can also be included in it. We tried, but we cannot be linked, unfortunately. This would be very beneficial to us!!
Not sure what is available for marketing offerings. Any support would be great, this area has a lot of potential.
Group insurance program
Continue to build the brand
More involvement in video content.
BC Ferries-better (any) marketing onboard for the Bella Coola Valley.
Business outreach, improved communication with other community stakeholders outside of the business community (including Chamber, City, CF, BIAs)
We are a non-profit, and do not collect MRDT. But would benefit from onsite tourism signage funding opportunities or collaborations. Would like to have more signage on site of region information, but we have not secured funds to do so yet.
More technical assistance with today's technology for websites and social media. Its overwhelming to the lay person.
Education on marketing strategies

Section 3: Overall Satisfaction

CONTD. 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?

Share more information in a broader spectrum than a newsletter. Short articles in a newsletter doesn't provide the amount of information to evaluate.

Eliminate the matching program. They should try to encourage regions to build tourism associations, which can be supported by MRDT money. For the trade show programs: Materials should be supported as well. Covering 50% of the booth fee is just a drop on a hot stone. The marketing part should be involved in the development part. We need to focus on the development now, that we have something to market later.

We'd like to receive more leads from trade contacts and/or digital leads form the website as we have a pipeline sales system that is yielding results with 7-12 touches per lead

Working in partnerships to help promote and funding for community.



Section 3: Overall Satisfaction

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

Since none seem to be offered we also do not know what the parameters are or could be

Return phone calls.

Assistance in value adding or expansion of services or places that represent or help me such as farmers market and/or the farmers market trail

More promotion of Gold Rush Trail

Treat your stakeholders like your customer, because they are

85% of tourism comes from BC travellers, but majority of the marketing spend is to international markets. CCCTAMA does not do enough to manage region tourism that is heavily impacted by local emergencies. Need to have more communication about where it is safe to travel to avoid massive loss of tourism mid-season. CCCTAMA too much focused on creating marketing campaigns with fancy pictures for German market and not sufficiently connected to the actual tourist in the region.

I'm pretty happy overall!

More outreach.

When you write our questions to be answered , make them more understandable to me , the big new business words in succession just make it confusing

I think the region, as defined, is too large to serve properly. the unique needs of Bella Bella are too far removed from Nazko, for instance. Or Barkerville, let's say.

More active customer approach, attracting more tourists to Chilcotin

At the end of the day, I am very pleased and proud of the CCCTA's history, ongoing work and encouraging future.

Funding would be nice, for projects that will actually help sell our lodge packages rather than mandating fine print criteria that makes established influencers not want to work with us.

More reps, have the MRDT meetings online and save that money for something else. I think it is not worth to make in person meetings, not enough attendance. Make the CCCTA & CCCTMA AGM free to attend for all stakeholders, it costs too much for small operators, especially if 2 want to attend. Just a thought.

More Communication Support of all tourism businesses equally

Greater communication, consistent staffing

Section 3: Overall Satisfaction

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

Funding cycle for MRDT should open in the fall and be awarded in the winter months.

Marketing the Cariboo Mountains and its attributes part of the region rather than focus on GRT. i.e. - Quesnel Lake, deepest fjord lake on earth; ancient interior rainforest; wildlife (including grizzly bears) and nature; the outdoor adventure opportunities. (Note: So many people are unaware there are grizzlies and other significant wildlife like mountain caribou here. Many think the only place to see grizzlies is on the west coast area. That's because Cariboo Mountains opportunities has never been effectively marketed to the right demographic.)

Be out there more. Share information at public meetings other than CCCT. Be more engaging. Be present in the communities.

More promotion of Gold Rush Trail

Change the matching program to a supportive funding program. At the moment it is like the rich regions are getting richer and the ones without money can't make any progress, because the funding for the matching is not available. Those matching programs are one of the most unfair ways to distribute money. The regions should get back the MRDT money they generate. CCTMA needs to insist, that they need the data, from where the money comes from.

85% of tourism comes from BC travellers, but majority of the marketing spend is to international markets. CCCTAMA does not do enough to manage region tourism that is heavily impacted by local emergencies. Need to have more communication about where it is safe to travel to avoid massive loss of tourism mid-season. CCCTMA too much focused on creating marketing campaigns with fancy pictures for German market and not sufficiently connected to the actual tourist in the region.

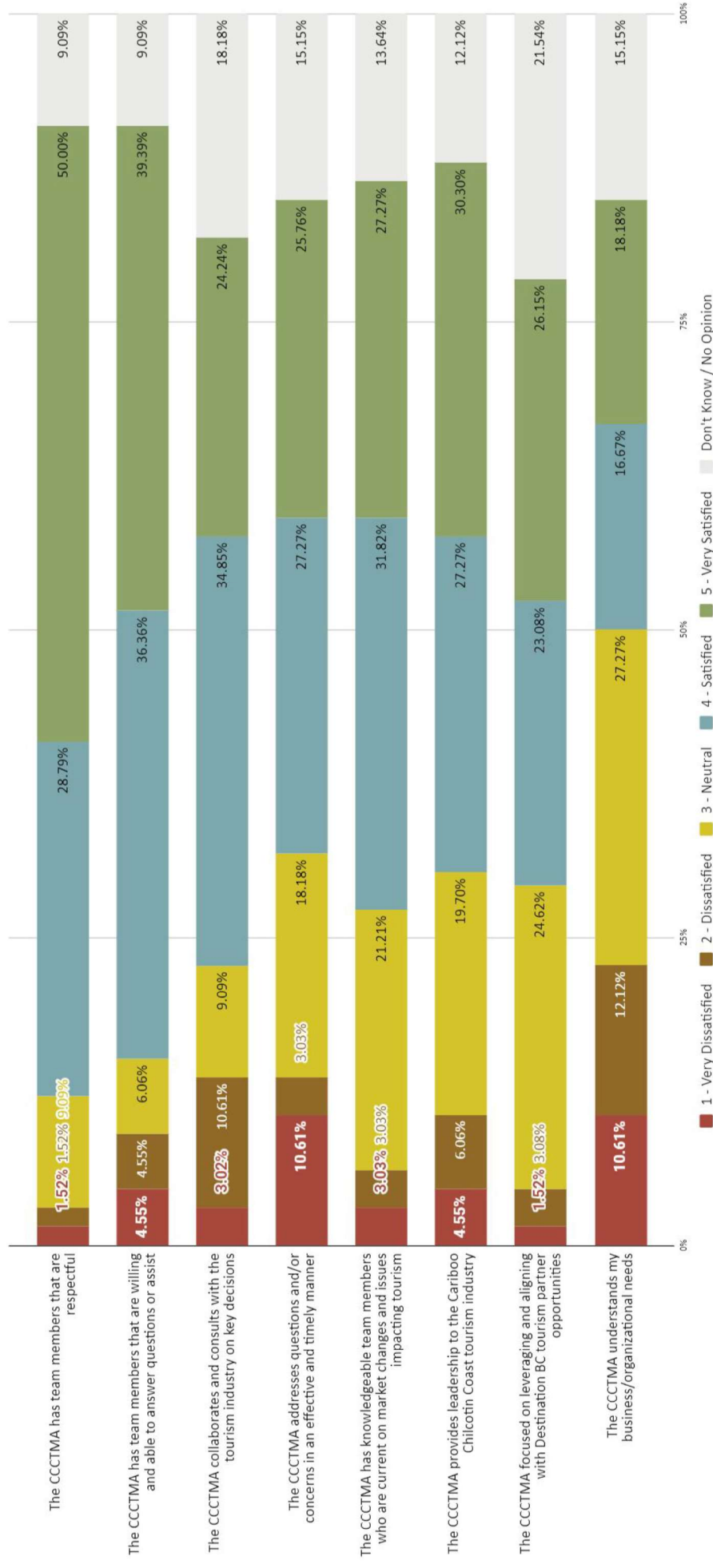
I think the CCCT does a good job overall for the region, just not so much for our business



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>2023</u>	<u>2022</u>	<u>% Diff:</u>
Q14A. Has team members that are respectful	4.36	4.09	6.6%
Q14B. Has team members that are willing and available to answer questions or assist	4.17	3.94	5.8%
Q14C. Collaborates and consults with the tourism industry on key decisions	3.81	3.69	3.3%
Q14D. Addresses questions and/or concerns in an effective and timely manner	3.64	3.20	13.8%
Q14E. Has knowledgeable team members who are current on market changes and issues impacting tourism	3.89	3.29	18.2%
Q14F. Provides leadership to the Cariboo Chilcotin Coast's tourism industry	3.83	3.69	3.8%
Q14G. Is focused on leveraging and aligning with Destination BC tourism partner opportunities	3.88	2.91	33.3%
Q14H. Understands my business/organizational needs	3.23	3.23	0%



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

Section 5: Insights About Tourism in the Cariboo Chilcotin Coast

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

	<u>2023</u>	<u>2022</u>	<u>% Diff:</u>
Business or other organization that provides products or services directly to tourists (e.g. hotel, restaurant, tour, outdoor activities)	65.63%	91.43%	-28.2%
Government organization (Municipal, Regional, Provincial or Federal)	12.5%	2.9%	331%
Organization, association, business or agency that supports tourism but does not provide services directly to tourists	9.38%	2.9%	223.4%
Other, please specify type of business	12.5%	2.9%	331%

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

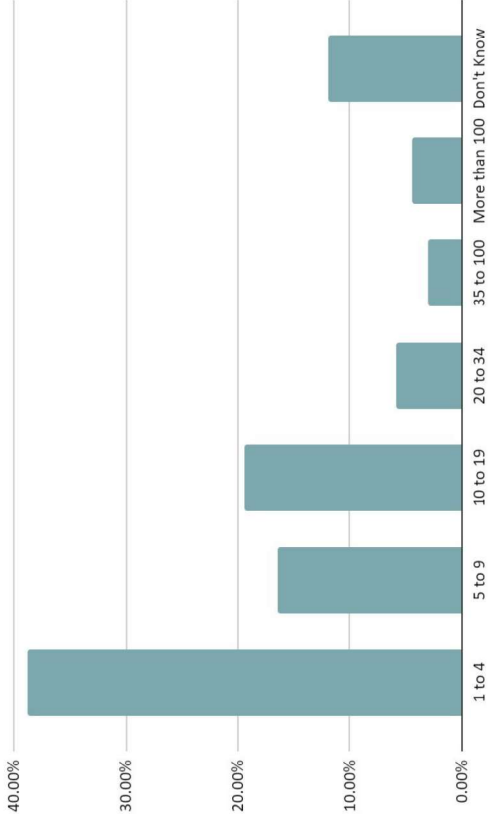
	<u>2023</u>	<u>2022</u>	<u>% Diff:</u>
0 - 10 Years	20.9%	34.29%	-39%
11 - 20 Years	16.42%	8.57%	91.6%
21 - 30 Years	16.42%	8.57%	91.6%
31 - 40 Years	11.94%	0%	11.94%
40 + Years	29.85%	42.86%	-30.4%
Don't Know/ Not Applicable	4.48%	5.71%	-21.5%

Section 5: Insights About Tourism in the Cariboo Chilcotin Coast



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>	<u>% Diff:</u>
1 to 4	38.81%	38.89%	-0.2%
5 to 9	16.42%	30.56%	-46.3%
10 to 19	19.40%	19.44%	-0.2%
20 to 34	5.91%	5.56%	6.3%
35 to 100	2.99%	2.78%	7.6%
More than 100	4.48%	0.00%	4.48%
Not Applicable	11.94%	2.78%	329.5%



Section 5: Insights About Tourism in the Cariboo Chilcotin Coast



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

	<u>2022</u>	<u>2021</u>	<u>% Diff:</u>
Accommodation	31.82%	61.11%	-47.9%
Attraction & Sightseeing	3.06%	0.00%	3.06%
Food & Drink	4.55%	2.78%	63.7%
Arts, Culture & History	6.06%	5.56%	9%
Transportation	12.12%	2.78%	336%
Guided Activity Provider	1.52%	0.00%	1.52%
Shopping	0.00%	0.00%	0.00%
Not Applicable	10.61%	N/A	N/A
Other: What kind of business are you?	27.27%	27.78%	-1.8%

Lakeside Resort - cabins. RV, tenting and fishing, boat rentals, water play, family summer activities

In order of priority. Shopping/Food & Drink, followed by Accommodation. 2/3 retail, 1/3 accoms

Guest Ranch

Hunting

Photography/Videography company

Seasonal Indigenous Guided Tours and Shoulder Season Accommodations

Chamber of Commerce

Cabin/Campsite and supervised trail rides

Travel Agency

Tidal Waters Fishing Lodges

Campground with cabins also

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.

Section 5: Insights About Tourism in the Cariboo Chilcotin Coast

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

Government

You should have the question for a full service operator that supplies everything, transportation, accommodations, meals, and guiding services.

Healing retreat

Support

accommodation and guided activity provider

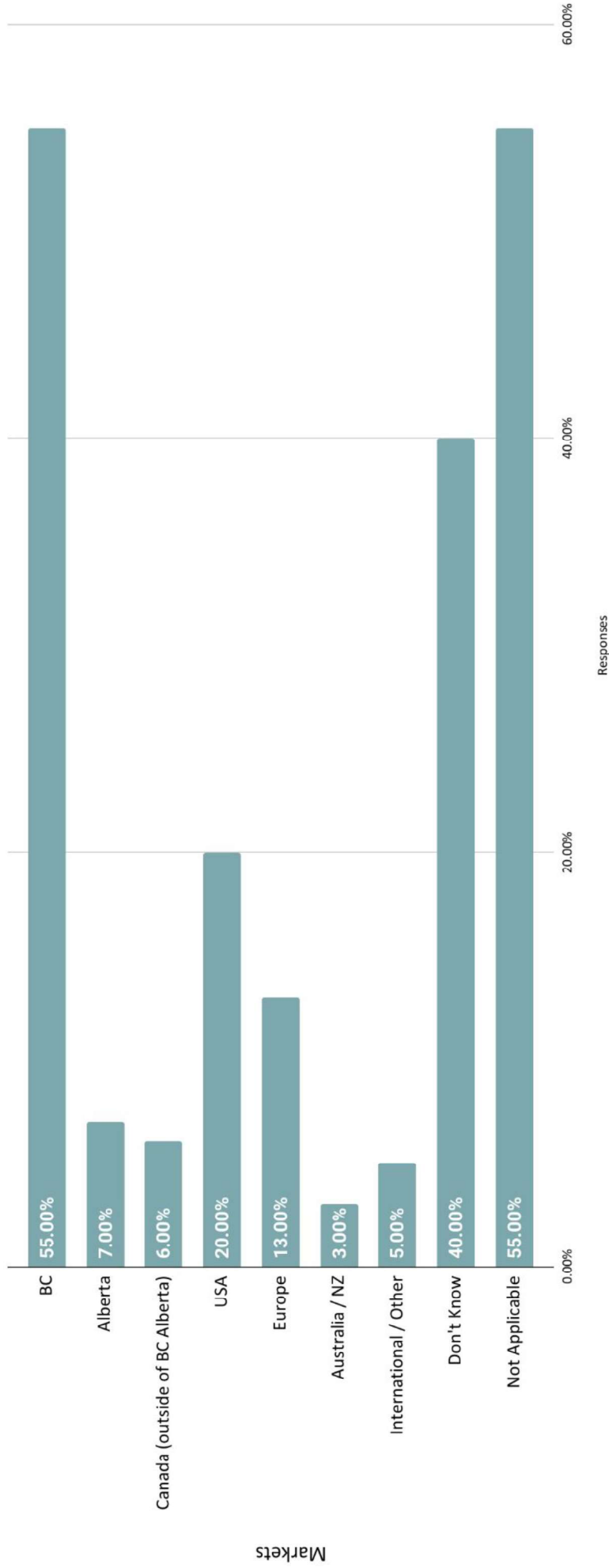
Visitor Centre



Section 5: Insights About Tourism in the Cariboo Chilcotin Coast



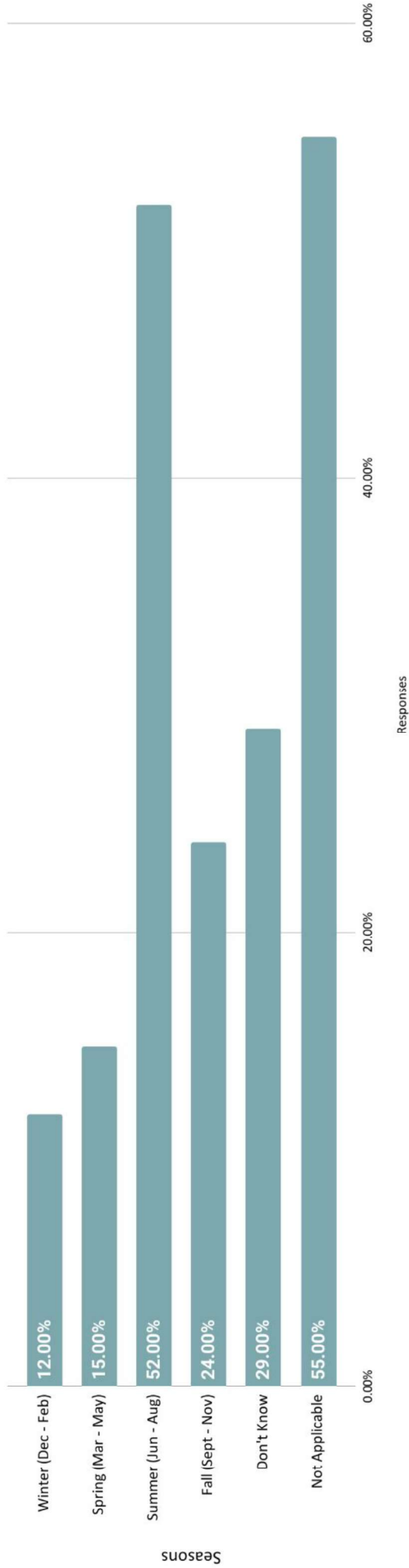
Q19. What percentage of tourists visiting your business in 2023 came from the following markets? Please fill in the percentage of all tourists that come from each market. The sum of all markets should equal 100%. Please type in '0' if you don't have tourists from a particular market. If you don't know, or this question is not applicable to you, fill the Don't Know or N/A box to 100.



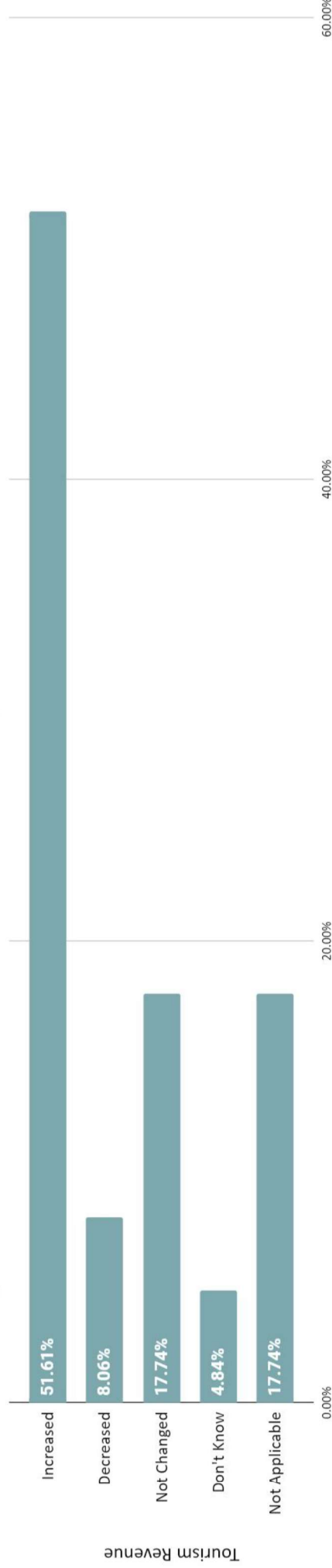
Section 5: Insights About Tourism in the Cariboo Chilcotin Coast



Q20. Thinking about your tourism revenue in 2023, 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



Q21. In 2023 versus 2022, how has the tourism revenue to your business changed? Select one response.



Section 5: Insights About Tourism in the Cariboo Chilcotin Coast

Q22. On the previous question you indicated increased or decreased, please provide the percentage change in revenue from 2022?





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

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

Q23. 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.

Fires media about fires increased costs to operate

Peak season staff. We do not have enough staff, therefore we have to reduce service hours.

Economy, extreme taxation, world unrest

Timber harvesting and road building

Distance, transportation, industrial sabotage of the tourism industry.

Encouraging new entrants

Wildfire concerns, distance/fuel costs, hesitation to travel north

Poor road condition on the Gold Rush Trail between Likely and Barkerville.

Climate crisis, inflation, leadership

Wildfire, wildfire smoke and other natural disasters. More appealing areas in BC. Too much focus on settler history (gold rush).

Poor marketing on the part of destinations and businesses (ie: explore wells had been inactive for 2+ years, driving zero growth in the area. Some service providers don't see the need for marketing, and some that I've spoken to haven't seen the need to update their imagery, websites, or social media presence - which is obviously a major mistake.

Accessible and regular/more frequent transportation in and out of these remote areas.

1) Beyond Hope 2) Lack of international airports 3) Lack of public transportation into the region

Insurance and property tax increases Mother Nature The terrible economy

Unfettered industrial growth

Smoky skies • floods • pandemics / fires

Fires, tax and rental increases forwarded to customers

CCC is barely unknown to tourists abroad - No good tourist infrastructure (rest stops on Hwy. 20, charging stations, etc.) - Procedures too complicated to offer exciting activities to tourists

Young people not interested in anything but social media, texting friends while sitting around a bonfire or partying and defacing grasslands while parked off the grid!!

Travel resources scatter in different area and lack of interaction, no good public support like good restaurants or parks, guidance on local tourism

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

COND. Q23. 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.

Food, fuel (amenities) and road conditions
Accessibility Climate change risk Economic conditions
Physical distances... (1) the CCCTA catchment area is so huge and diversified, (2) connectivity or lack thereof (3) ever-escalating fuel and service cost (inflation)
Client concern with poor health care for seniors in BC, cost of travel & US travellers concern with world unrest
Access to the region by road, ferry, and air. Ferry and flight schedules need to be released much further in advance. The total cost of travel is also a challenge in terms of both time and money. The lack of clear signage and connectivity to wayfinding devices and communications across the Chilcotin Plateau is also prohibitive to certain audiences.
Getting qualified or skilled employees managing increasing food costs labour costs
Tourism Area too large
Succession plans to take over businesses; purchase prizes for resorts, campgrounds,... are very high, especially if they are located on lakes. Operating costs are very high and if you need a mortgage to pay for the property/business, you are not making much money at the end of the day. You would be working more for fun and who wants to do that, especially work 7 days in the summer months?? Easier to sell it to private people and then the local economy loses a lot of money. Location, just had snow on the long weekend and travel distance with high gas prices!! (not much we can change for location but it is definitely a barrier) Not enough cabins/campsites for rent available
Traditions
Communication
Aging infrastructure, no tourist attraction,
Operating costs increases are disproportionate to revenue increase Tourists wildfire fear Cost of living affecting tourism dollars
Accommodation inventory, road conditions, restaurant inventory
1. Shortage of accommodation capacity (due to residential conversions, aging and deteriorating properties); 2. Changing retail landscape 3. Lack of tourism industry stakeholder collaboration
DBC's focus on international visitors, and directing them to tourism hot spots like Whistler, Vancouver and Victoria despite having dispersion in their strategy. CCC's poor communication tactics, working with the same players over and over again and doing very little if anything to reach new entrants. Long distances from large markets for weekend travel, but limited assets for longer stays.
Forest fires
Singular highway access (Hwy 20). Fear of wildfire danger, whether real or perceived. Limited season of BC Ferries direct service Port Hardy-Bella Coola.

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

CONTD. Q23. 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.

Access - Flying is costly; bus service is limited; driving to our region is time consuming, especially for anyone with limited time i.e. those coming from southwest or southeast BC; train used to be a reasonably priced service but was taken out of service several years ago. Lack of marketing from DBC of the quality product in rural areas - too much concentration on the easy super highend markets like Whistler, Vancouver Island, Okanagan. Lack of higher quality accommodation and related services. Some smaller communities in the region have no tourism accommodation.

Limited and slow growth in recreational infrastructure.

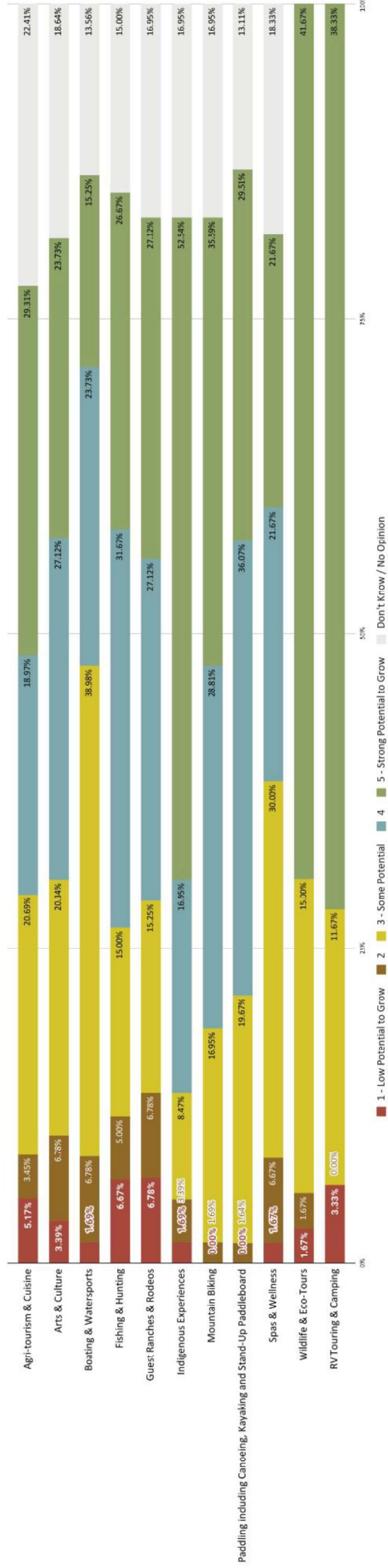
Lack of qualified Workers and staff - small operators with limited knowledge or skill sets to best utilize social media, Google analytics - funding or availability to funding resources. Many are still trying to become fully utilized.

Partnerships/Funding/Activities

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

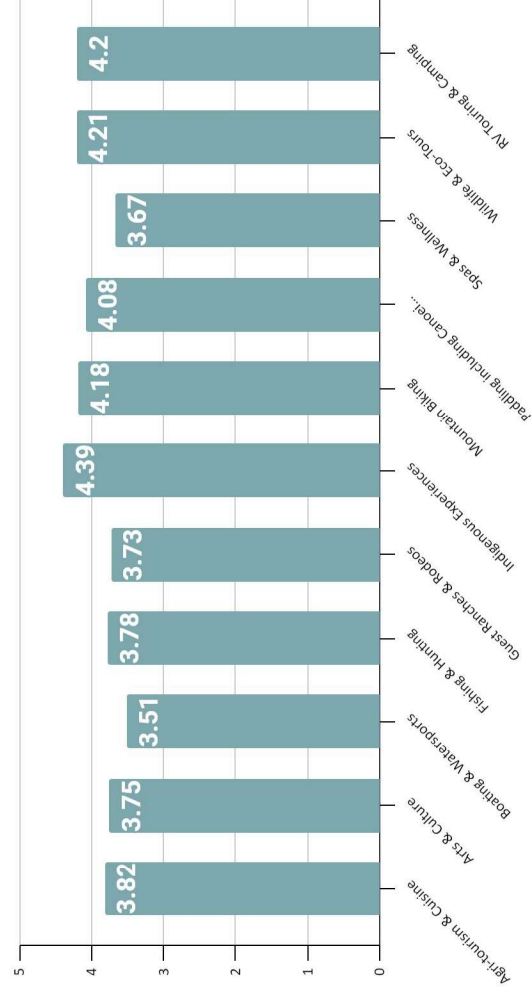


Q24. How much growth potential do you think each of the following tourism products and/or experiences have within the Cariboo Chilcotin Coast?



	2023	2022	% Diff
Q24A. Agri-tourism & Cuisine	3.82	2.97	28.6%
Q24B. Arts & Culture	3.75	3.09	21.4%
Q24C. Boating & Watersports	3.51	3.24	8.3%
Q24D. Fishing & Hunting	3.78	3.67	3%
Q24E. Guest Ranches & Rodeos	3.73	3.26	14.4%
Q24F. Indigenous Experiences	4.39	3.35	31%
Q24G. Mountain Biking	4.18	3.32	25.9%
Q24H. Paddling including Canoeing, Kayaking & Stand-Up Paddleboard	4.08	3.86	5.7%
Q24I. Spas & Wellness	3.67	2.97	23.6%
Q24J. Wildlife & Eco-Tours	4.21	4.09	2.9%
Q24K. RV Touring & Camping	4.2	3.43	22.4%

Mean Perceived Tourism Growth Potential in 2024



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

Q25. 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?

Offering physically challenged individuals the opportunity to fish or overnight in a remote cabin.

Historic sites

Paranormal tourism (wink)

Stargazing, no light pollution

Festivals and special events, sport-related tourism

Retreats for people with burn-out syndroms, or for people who do not feel a connection with earth anymore. I hope that indigenous experiences could cover some of it. We have, what it needs, to calm down and recharge right in front of our homes (most of them) but we cannot accommodate more people and if we want to expand, there are so many hurdles put in front of you, that you are not even starting to add more units, RV pads,...the costs are just incredibly high

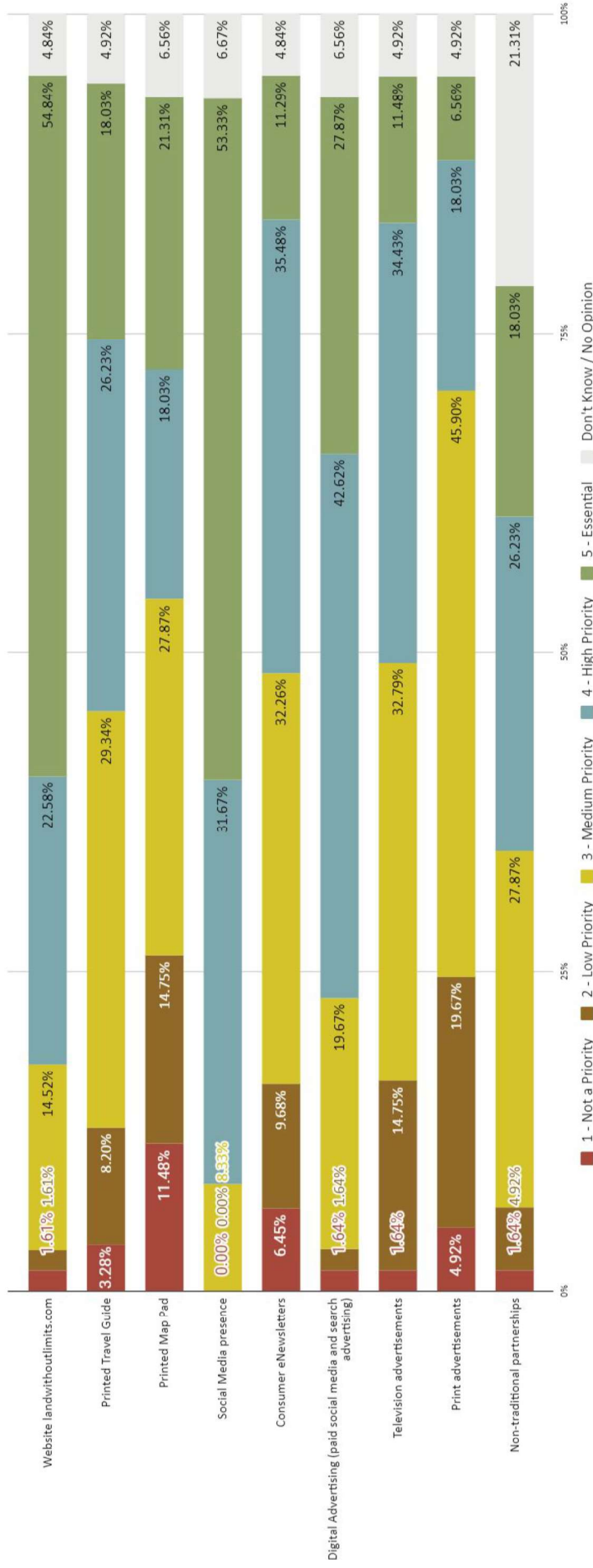
Hiking, history

Hiking

More shoulder season activities

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

Q26. 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?

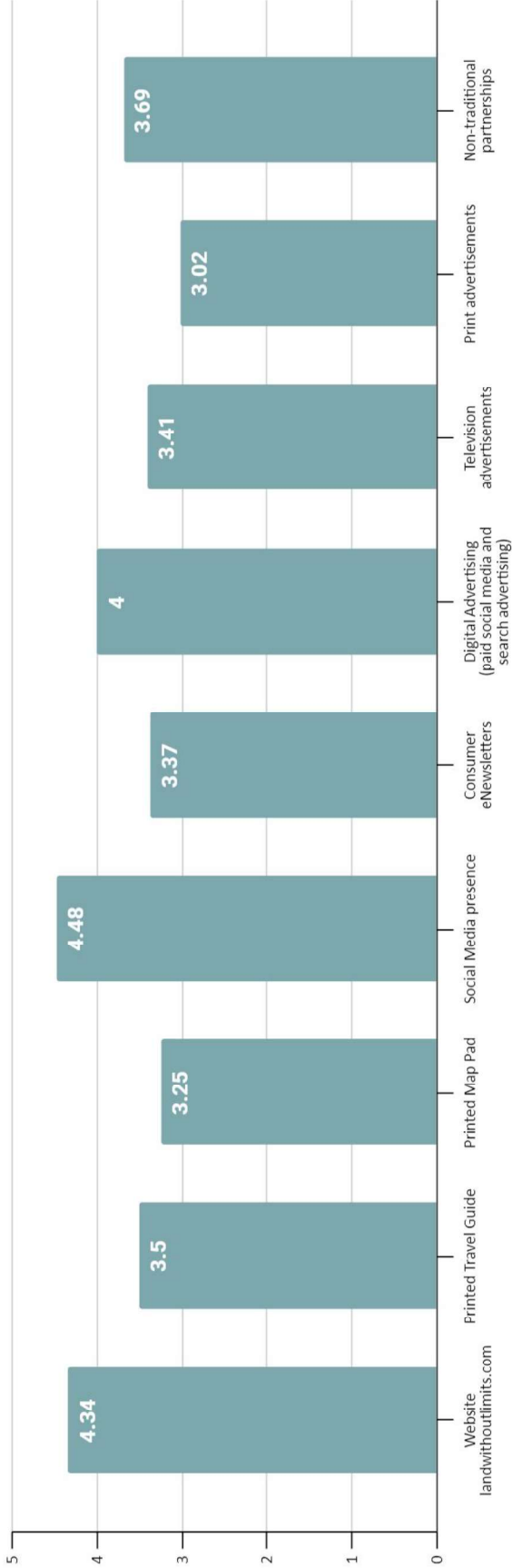


Section 6: Moving Forward - The Future of Tourism in the Cariboo Chilcotin Coast



	<u>2022</u>	<u>2021</u>	<u>% Diff</u>
Q26A. Website landwithoutlimits.com	4.34	3.71	17%
Q26B. Printed Travel Guide	3.5	3.17	10.4%
Q26C. Printed Map Pad	3.25	3.15	3.2%
Q26D. Social Media presence	4.48	4.09	9.5%
Q26E. Consumer eNewsletters	3.37	2.56	31.6%
Q26F. Digital Advertising (paid social media and search advertising)	4	3.82	4.7%
Q26G. Television advertisements	3.41	3.27	4.3%
Q26H. Print advertisements	3.02	2.94	2.7%
Q26I. Non-traditional partnerships	3.69	3.24	13.9%

Mean Perceived Importance of Marketing Activities for 2024



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

Q27. 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?



Details continued on next page

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

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>2023</u>	<u>2022</u>	<u>% Diff:</u>
Q27A. Supporting tourism product development (i.e. providing research, tourism insights, and/or by identifying opportunities)	4.02	3.44	16.9%
Q27B. Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding tourism experiences)	4.13	3.29	25.5%
Q27C. Trip planning (i.e. ensuring visitors have the information they need while planning their trip to the Cariboo Chilcotin Coast)	4.02	3.89	3.3%
Q27D. Visitor services (i.e. ensuring visitors have the information they need while in the Cariboo Chilcotin Coast)	4.13	4.03	2.5%
Q27E. Transportation (i.e. communicating tourism perspectives to transportation managers to ensures smooth flow of people to/within the Cariboo Chilcotin Coast)	3.89	3.68	5.7%
Q27F. Community relations (i.e. working with the community in the region on behalf of the tourism industry)	4.05	3.94	2.8%
Q27G. Marketing research and industry performance tracking (i.e. accurately measuring industry and regional performance)	4.02	3.71	8.4%
Q27H. Destination management (e.g. managing the MRDT, working with provincial, regional, and community organizations to advance tourism)	4.27	3.74	14.2%
Q27I. Communication about the value of the tourism industry to the broader Cariboo Chilcotin Coast community	4.09	3.83	6.8%

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

Q28. The last word is yours - Are there any additional comments you would like to make?

I want to know more about how this organization works with our tourism business. There seem to be a few who are very involved and some of us who are not. There are no doodle polls to arrange information sessions that fit my time. Times are dictated to me and if I am unable to make it then I miss out. Though I have asked for follow up and or debriefing I do not get it. There have been conversations about arranging one on one times however the ball gets dropped and I do not hear back. May first contact agent was great Patty Gerhart. I don't even know who we have now. I reached out last year and was not impressed with the lack of follow through and I said as much.

Return phone calls.

Very frustrated with the loss of wild places from industrial timber harvesting. this has destroyed many opportunities for backcountry tourism.

Gold Rush Trail site - Plan Your Trip - would be nice to have a mention. Goes right past us.. <https://goldrushtrail.ca/journey/leg/hat-creek-to-logan-lake/>

Thank you for your hard working in supporting the growth of tourism in the region.

Operators are struggling with ever increasing costs, which is a huge threat to the sector if these businesses start to sell and shut down. Work with government on more grants for this sector (versus loans). No one can take on more debt at this point. Thank you!

To be honest, I have not been connected with the CCCTA in recent years as my business has taken me out of my CCC tourism region (to other tourism regions and parts of Canada). But I have driven tourists to BC from other areas of Canada.

The CCCTA has always been there when I've required their services and I appreciate the time and efforts they put into keeping our area in the public's eye!!

Our business is not generated through foot traffic or random clicks on a website. I've been told that the link to our website receives the most clicks but I can't trace one sale back to the CCCTMA. I ask every guest where they heard about us. Not once has the answer been anything other than our own targeted marketing campaigns or work we have done with tv-shows, podcasts, or our own social media following. The referrals from bcadventure and landwithoutlimits rank 23rd, 24th and 47th of all referrals we receive to our website. In total all clicks combined equate to a fraction of a percent yet this is celebrated by the CCCTMA. While the CCCTMA likely generates tourism dollars for normal tourism activities and businesses like hotels, restaurants, ski hills etc it does not seem to serve high dollar transaction tourism businesses in our area. To reiterate, in the last 6 years since I have been doing marketing for our lodge I can't trace a single booking back to the CCCTMA. Our PST contributions are significant but our marketing needs are not as generic as most other tourism businesses. People don't peruse a website and randomly decide to spend \$4500+ on a 5-day fishing vacation. My honest opinion is we are not even remotely getting back what we are contributing if 3% of PST collections are supposed to be allocated to the enhancement of our tourism marketing needs. We are fully extended within our budget to market and it would be helpful to have meaningful assistance from the CCCTMA.

I'm the assistant of the owner working on administrative and customer management. From last year I greeted many tourist from Europe, who mostly stop over for one night and didn't stay at our area, I feel they didn't find much to do at our area. I know very little about the association and the work it did in 2023, so the answer of this survey could be not accurate as we attain very limited information and I even don't know we are one member of it. We would like to establish connection in the future. Is it only through mails? I don't have any other information on this, hopefully we can know more on this part. Thank you.

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

Q28. The last word is yours - Are there any additional comments you would like to make?

In my opinion the first step is to get rid of the matching fund system. At least for associations. It just doesn't make sense that we have to match the money, that we have generated already. It feels like we are matching our own money.

Very well researched and presented survey. It made me think and respond accordingly. WELL DONE!

We are very pleased with all the work that has been done and look forward to a very prosperous 2024!

Appreciate all the hard work. Thank-you!

We do not have a marketing problem but a product development/inventory problem. The product must first be available before marketing is doing any good. One does not work without the other. Working together, finding matching grants and cooperate with all levels esp. with private sector groups is vital to make our economy sustain in the CCC area. CCCTMA and CCCCTA must work out a plan, to grow at the same time. Have we ever taken inventory of how many resorts/campgrounds are run by 55+ yr old people? How many young people took over those types of businesses or opened up a new business in the past years, and how many will take it over in the coming years??? If we don't want that all our resorts along lakes are going into private hands, we need to work on a solution and make it feasible for our next generation to buy resorts and run them as a sustainable business. Operating costs must come down so please lobby government on taxes, insurance companies on premiums,... on behalf of all of us, we need it now more than ever! I realize this is more something for the CCCTA but again, if we spend thousands of dollars on marketing and no inventory is around (anymore), marketing won't help at all and many of our small areas within CCC will lose their tourism dollars... Lobby government to let us use MRDT money for product development, that would better fit our area, instead of using it for affordable housing..., I don't see the need in our area for that but I see clearly a need for product development and inventory.

It took me 20 years to actually get Rivers Inlet shown on the BC Tourism maps... CCCTA is of little help to the Tidal Waters Fishing lodges due to the Tourism Region being too large to include the corner where Rivers Inlet is...

Keep promoting the CCC to our most valued markets, which you've done a pretty good job with.

The CCCTA should work to ensure that tourism stakeholders understand the CCCTA's role in the tourism landscape. While the regional nature of the CCCTA has benefits, there are also challenges in terms of communities feeling well represented.

Don't duplicate efforts. Some of the items listed above should be the focus of CCCCTA not CCCTMA. Some of the items listed above are well done by VICs and communities. Work together!

A large amount of marketing seems to be dedicated to rubber tire traffic (RV's and camping). There is many high quality tourism products (operations of exceptional standard) in our region that may be beyond the median average traveller that need to be more strongly marketed to a different demographic as these types of businesses have unique locations and challenges, but are high dollar earners for the region with many community spinoffs.

Little is known about the CCCTMA or even what MRDT is. Most, outside of the accommodators, have any knowledge of this funding or even care. What they need to know is how it best works for their business.

Media and social networking



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 "2024 Cariboo Chilcotin Coast Tourism Marketing Association Stakeholder Survey of 2023 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 "2024 Cariboo Chilcotin Coast Tourism Marketing Association Stakeholder Survey" was sent to 348 stakeholders in the Cariboo Chilcotin Coast MRDT Collecting Partners database.

The online survey was conducted between May 15, 2024 and May 31, 2024. The initial survey was sent May 15, 2024 and four reminders were sent May 21, 2024, May 24, 2024, May 28, 2024 & May 30, 2024. The survey closed on May 31, 2024. A total of 87 completions were received for a 25% 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:

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