

North American Edition

TIME FOR

DEMOCRACY

Presentation of Findings
July 2022

Destination  Analysts



PROJECT OVERVIEW & METHODOLOGY

Time for DMOcracy is an international study to define global best practices in building successful, resilient, and enduring partnerships with local residents, community groups and businesses.

Miles Partnership is leading the North American edition of this global study and is working with a range of agency and association partners in this project, including Group NAO (the program creator and European edition lead), Coraggio Group, Destination Analysts, Destinations International and the Destination City Alliance in Europe.

The North American edition of the study undertakes a deep dive into six critical themes related to community engagement:

- Community Participation Models
- Resident Sentiment Research
- Workforce & Staffing
- Diversity, Equity & Inclusion
- Media & Communications
- Short Term Rentals & Housing

Data collection for Time for DMOcracy took place between June 21st – July 6th.

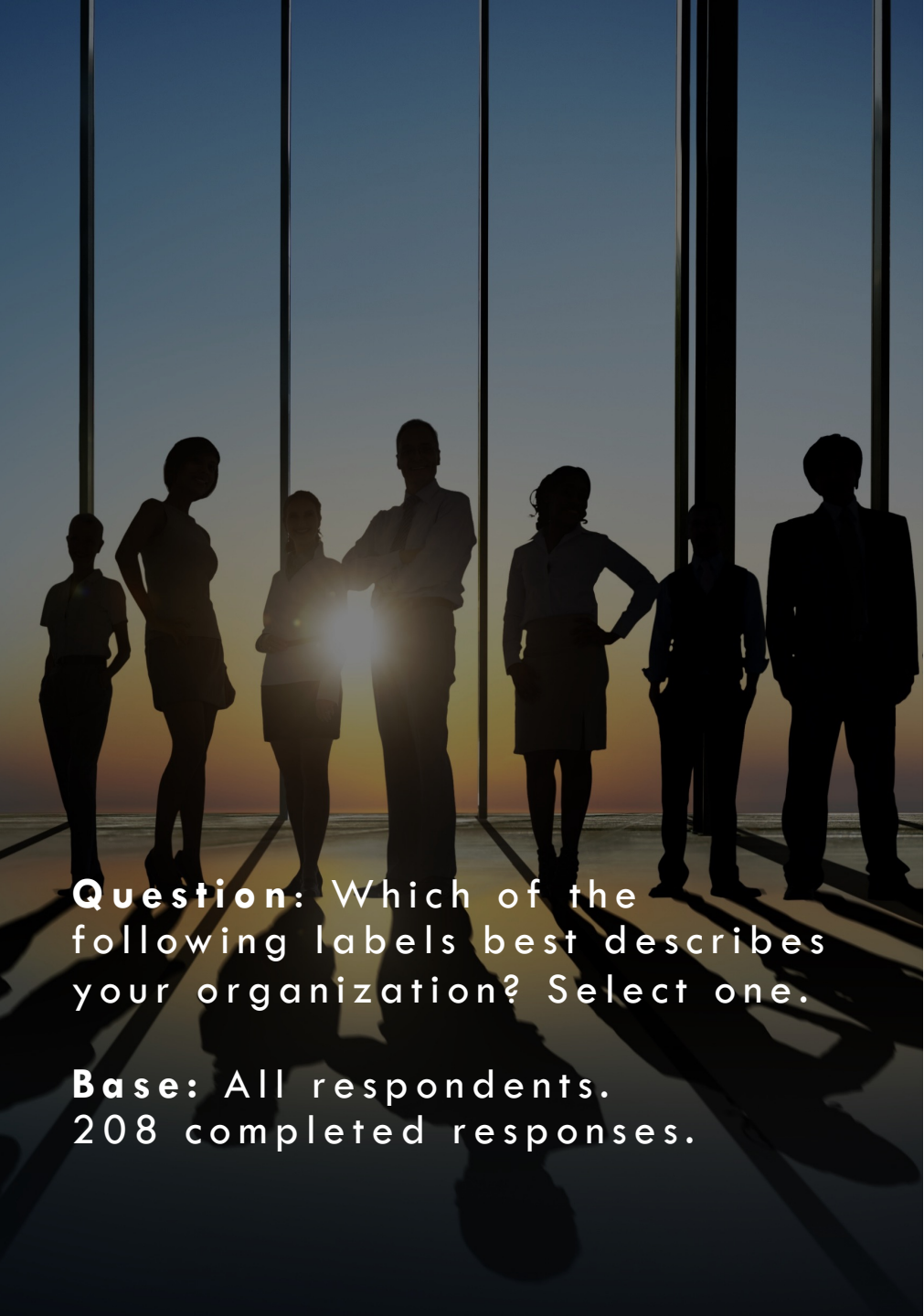
In total, 208 fully completed surveys were collected.

Led & Facilitated By:



In Partnership With:

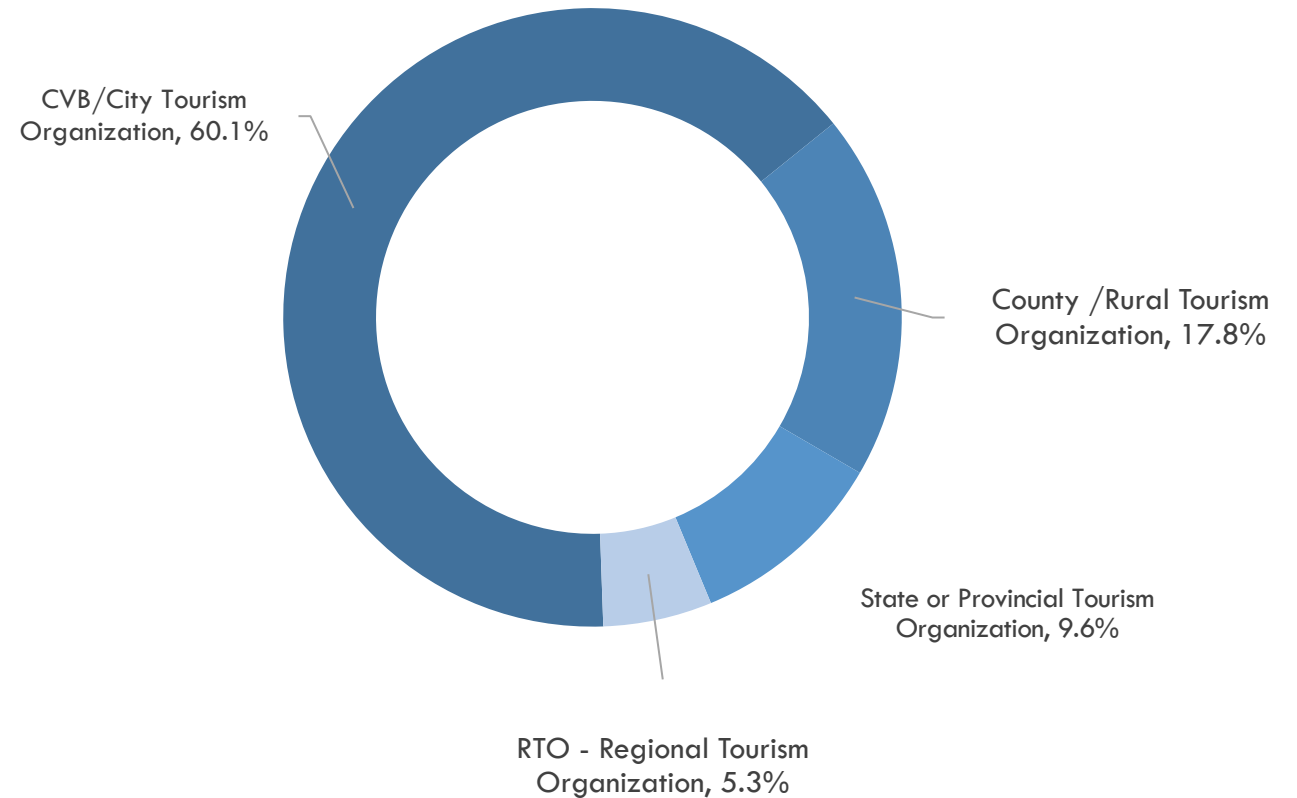


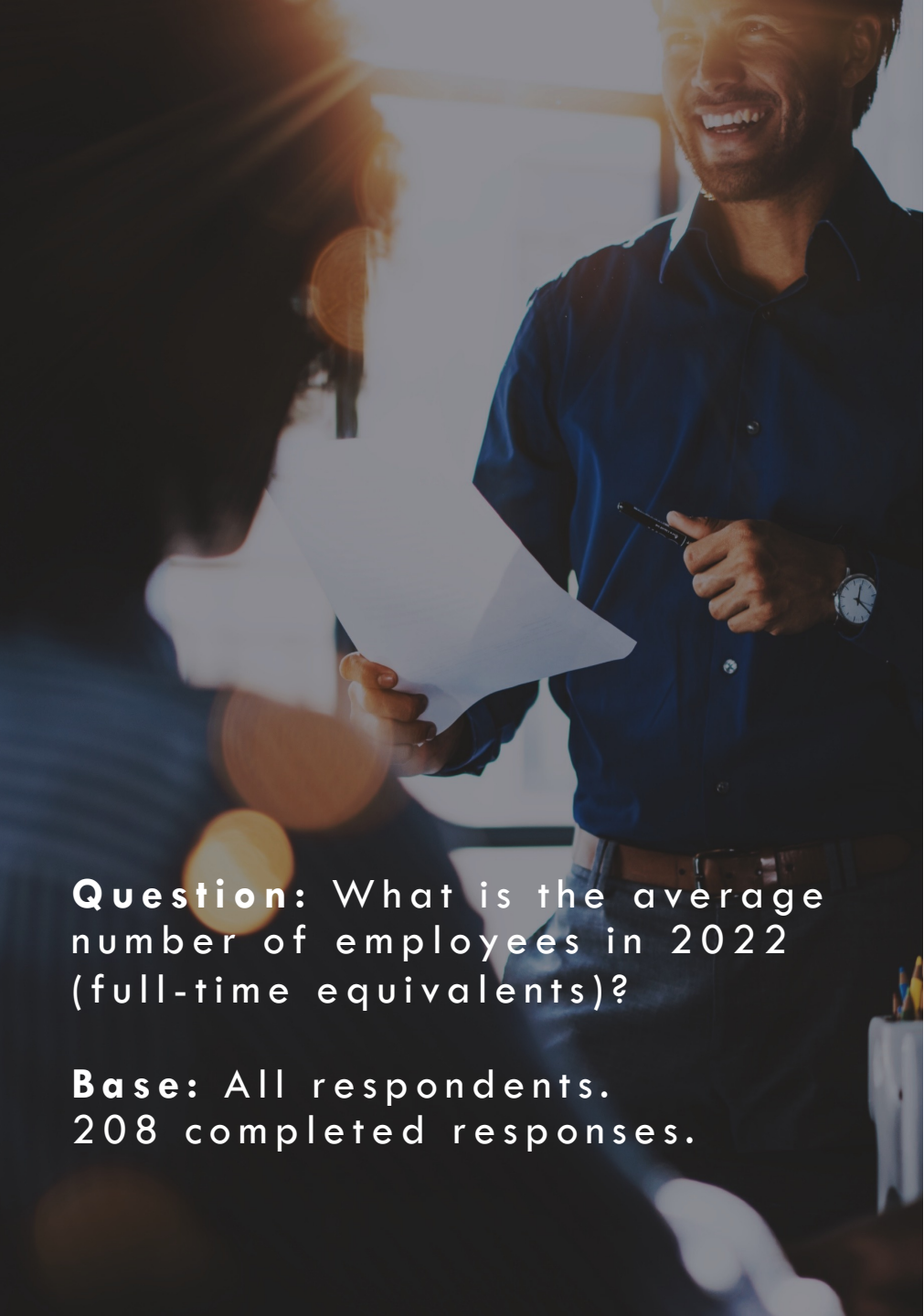


Question: Which of the following labels best describes your organization? Select one.

Base: All respondents.
208 completed responses.

ORGANIZATION TYPE

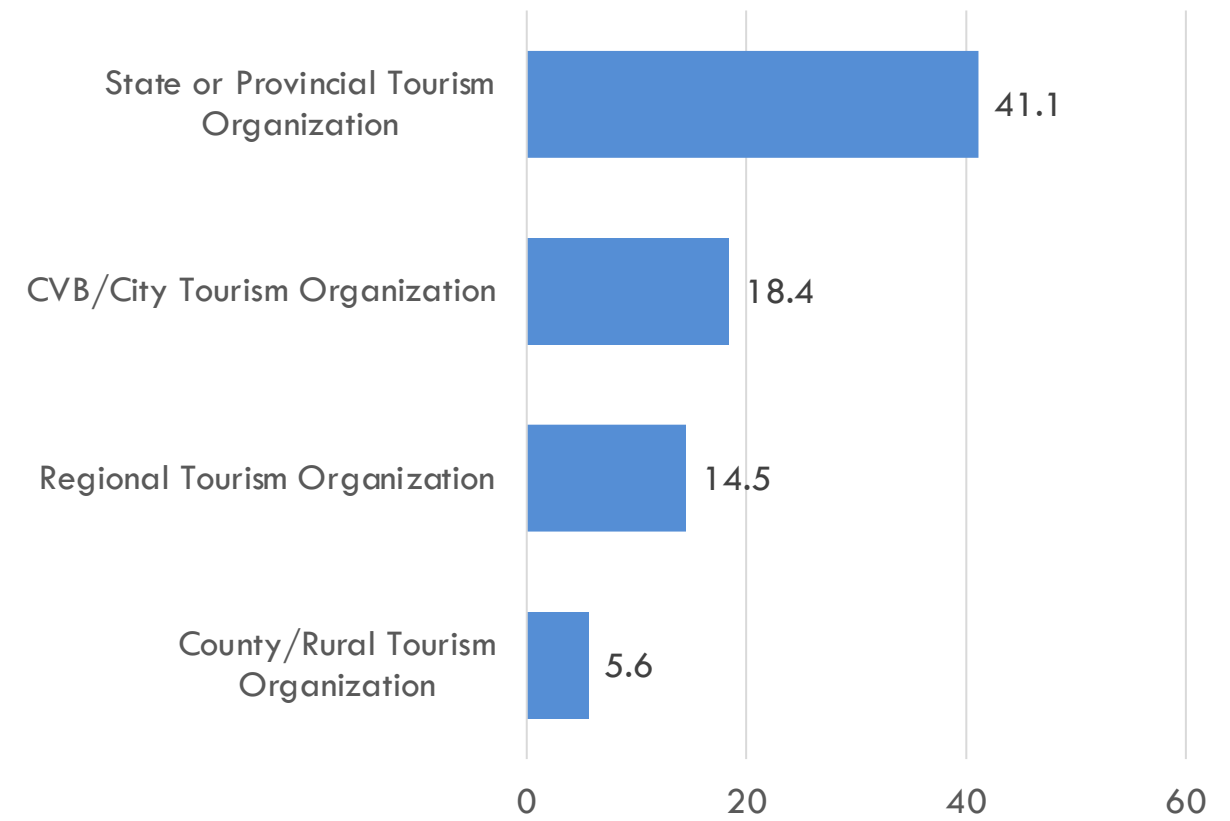




Question: What is the average number of employees in 2022 (full-time equivalents)?

Base: All respondents.
208 completed responses.

AVERAGE NUMBER OF FULL-TIME EMPLOYEES



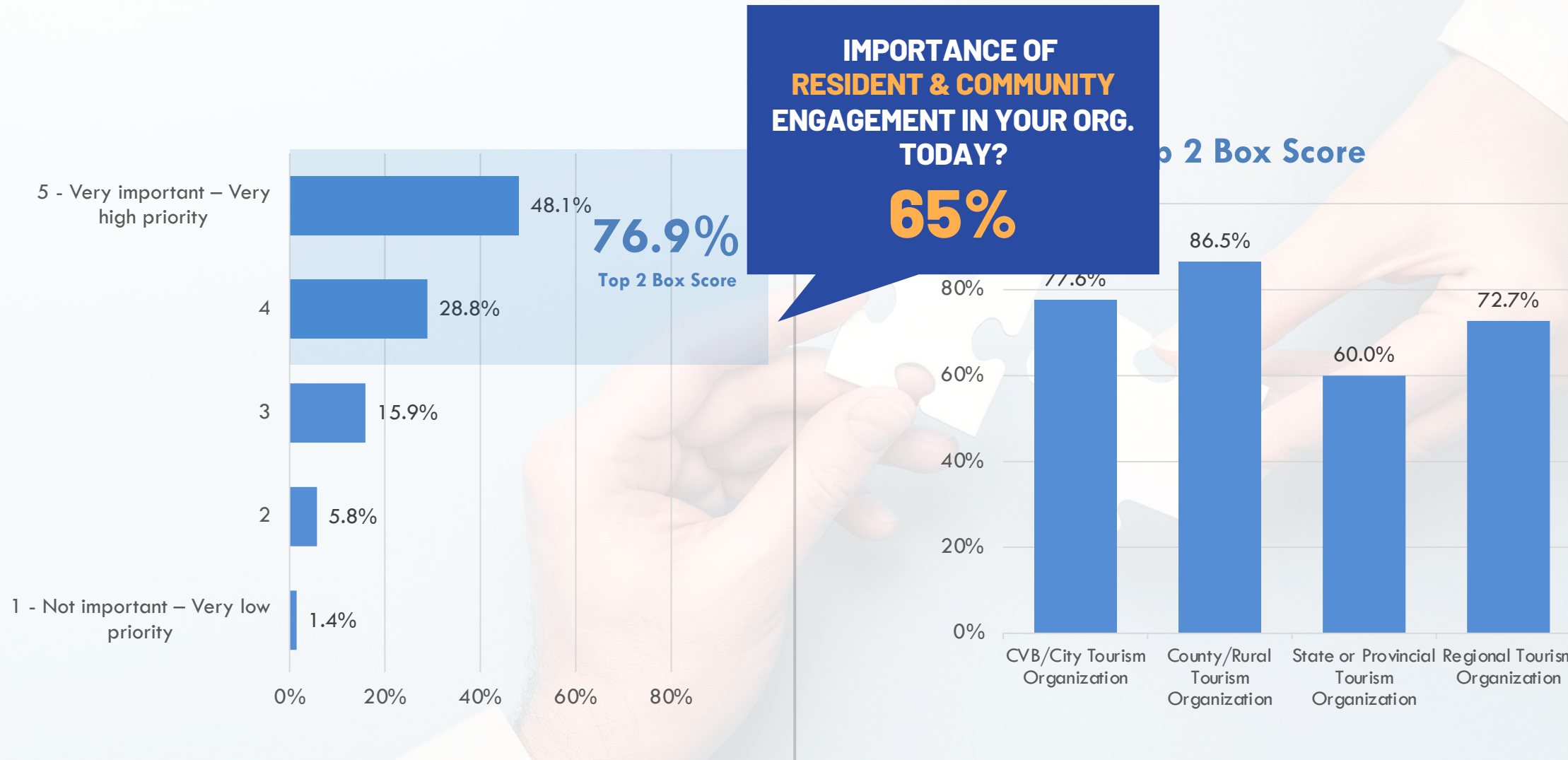
ORGANIZATION'S STRATEGIC FUNCTIONS



Question: Which of the following strategic functions/activities characterize your organization?

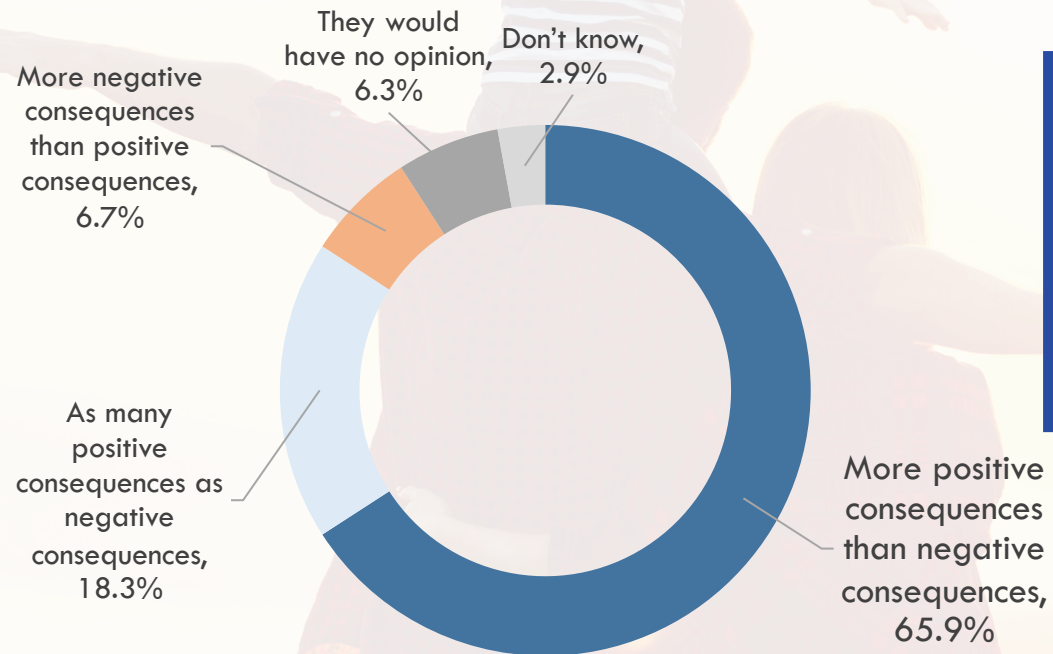
Base: All respondents.
208 completed responses.

IMPORTANCE OF COMMUNITY ENGAGEMENT



Question: Overall, how would you describe the importance and priority of local resident and community engagement in your organization today? **Base:** All respondents. 208 completed responses.

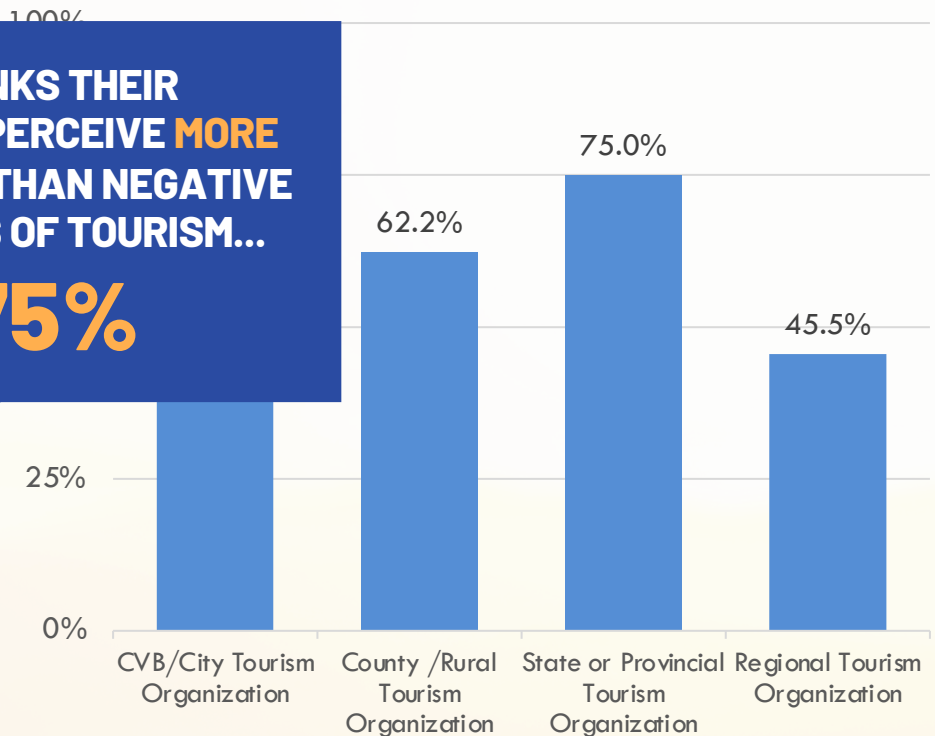
RESIDENTS' PERCEPTIONS OF TOURISM'S IMPACT



THINKS THEIR
LOCALS PERCEIVE **MORE
POSITIVE** THAN NEGATIVE
EFFECTS OF TOURISM...

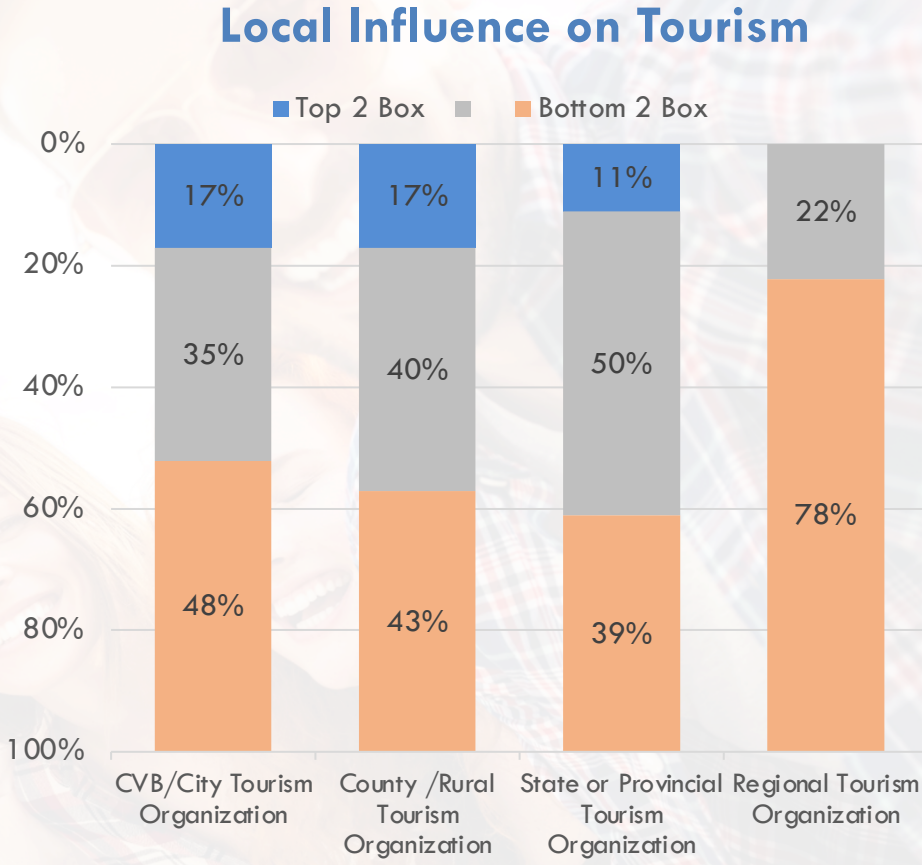
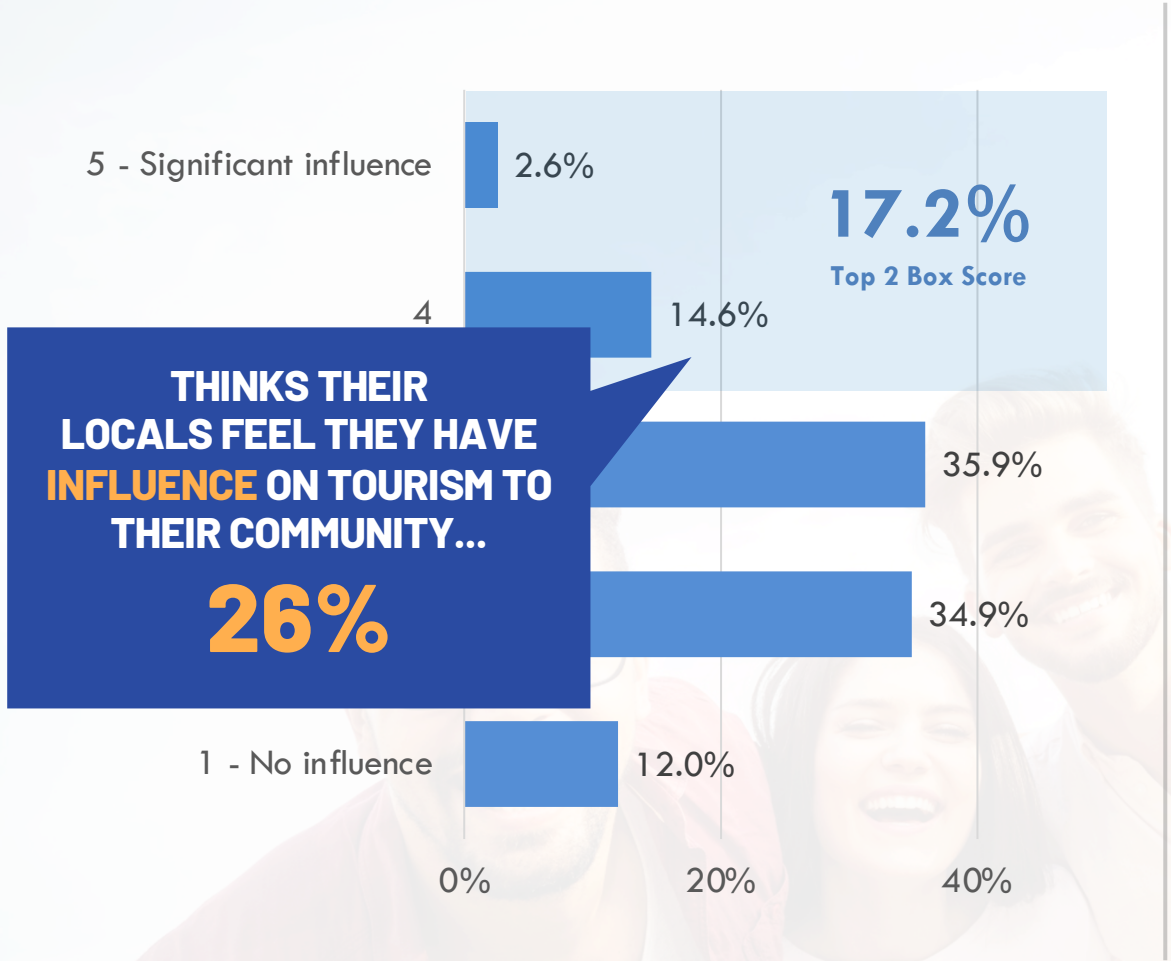
75%

More Positive Impacts



Question: If asked, would your local residents likely say that tourism in your destination has mostly positive or mostly negative impacts on the community? **Base:** All respondents. 208 completed responses.

RESIDENTS' FEELINGS OF INFLUENCE ON TOURISM



Question: To what degree do you believe that local residents feel they have any influence when it comes to development or management of tourism in your destination? **Base:** All respondents. 192 completed responses.

IMPORTANCE OF TOURISM STAKEHOLDER ENGAGEMENT

IMPORTANCE OF
ENGAGEMENT W/ TOURISM
INDUSTRY STAKEHOLDERS
IN YOUR ORG. TODAY?

88%

Question: What is the importance & priority of engagement with tourism businesses/industry stakeholders in your organization?

Base: All respondents.
208 completed responses.

5 - Very important – Very high priority

73.1%

4

22.6%

95.7%
Top 2 Box Score

3

3.8%

2

0.5%

1 - Not important – no priority

0.0%

0%

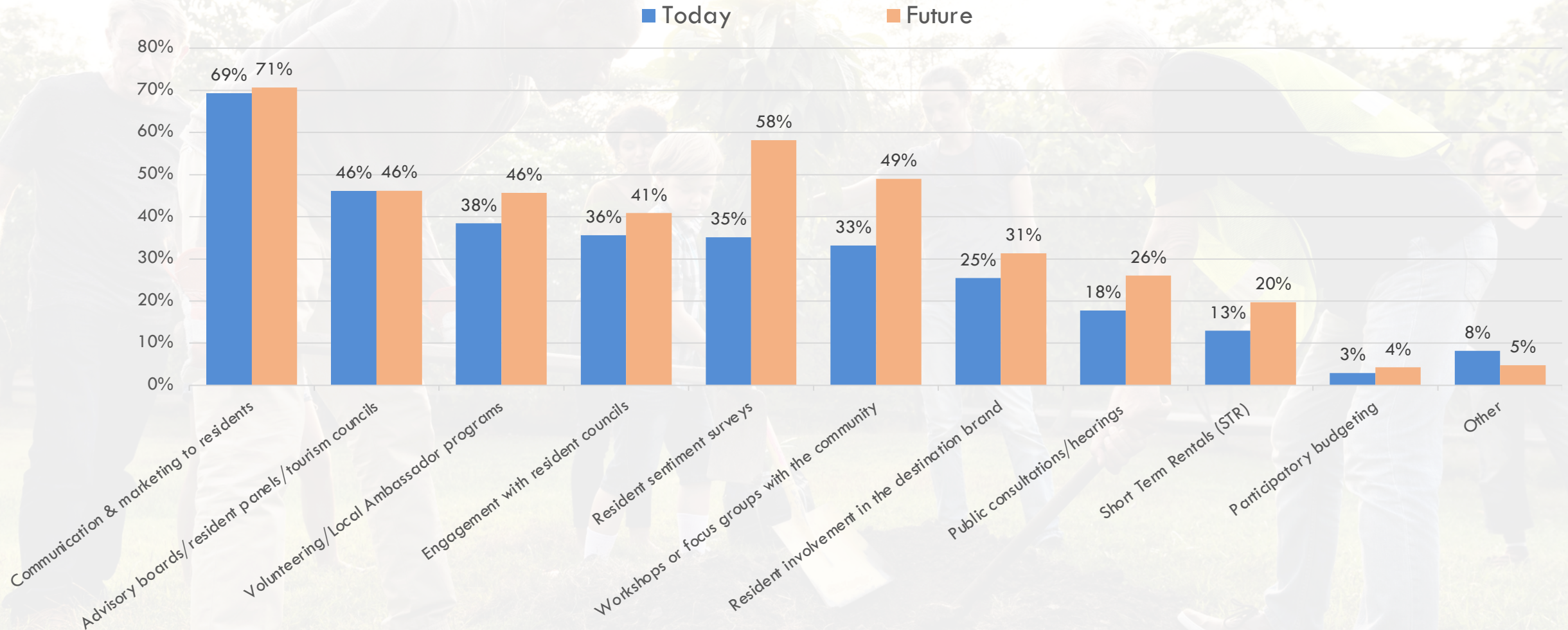
25%

50%

75%

100%

INVOLVEMENT IN RESIDENT ENGAGEMENT ACTIVITIES

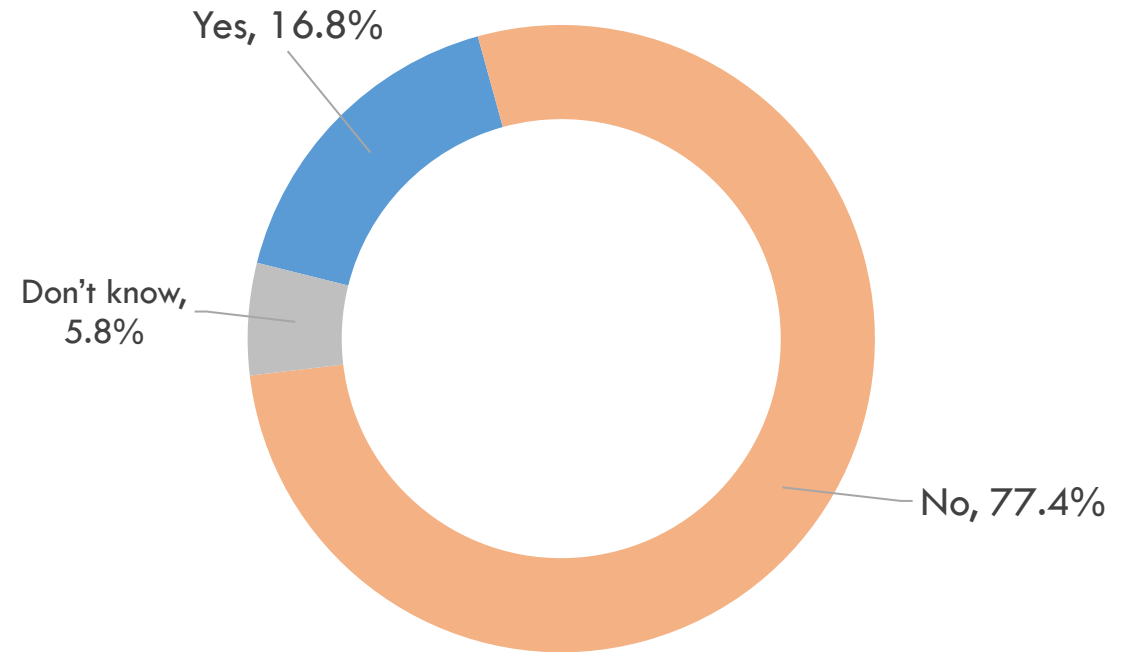


Question: Which of the following resident engagement activities is your organization involved in today?
Select all ongoing or recent (1-2 years) activities. **Base:** All respondents. 192 completed responses.

USE OF KPI'S FOR RESIDENT SENTIMENT & COMMUNITY ENGAGEMENT

Question: Does your destination have a KPI (Key Performance Indicator) for resident sentiment and/or community engagement as part of its planning and reporting?

Base: All respondents.
208 completed responses.

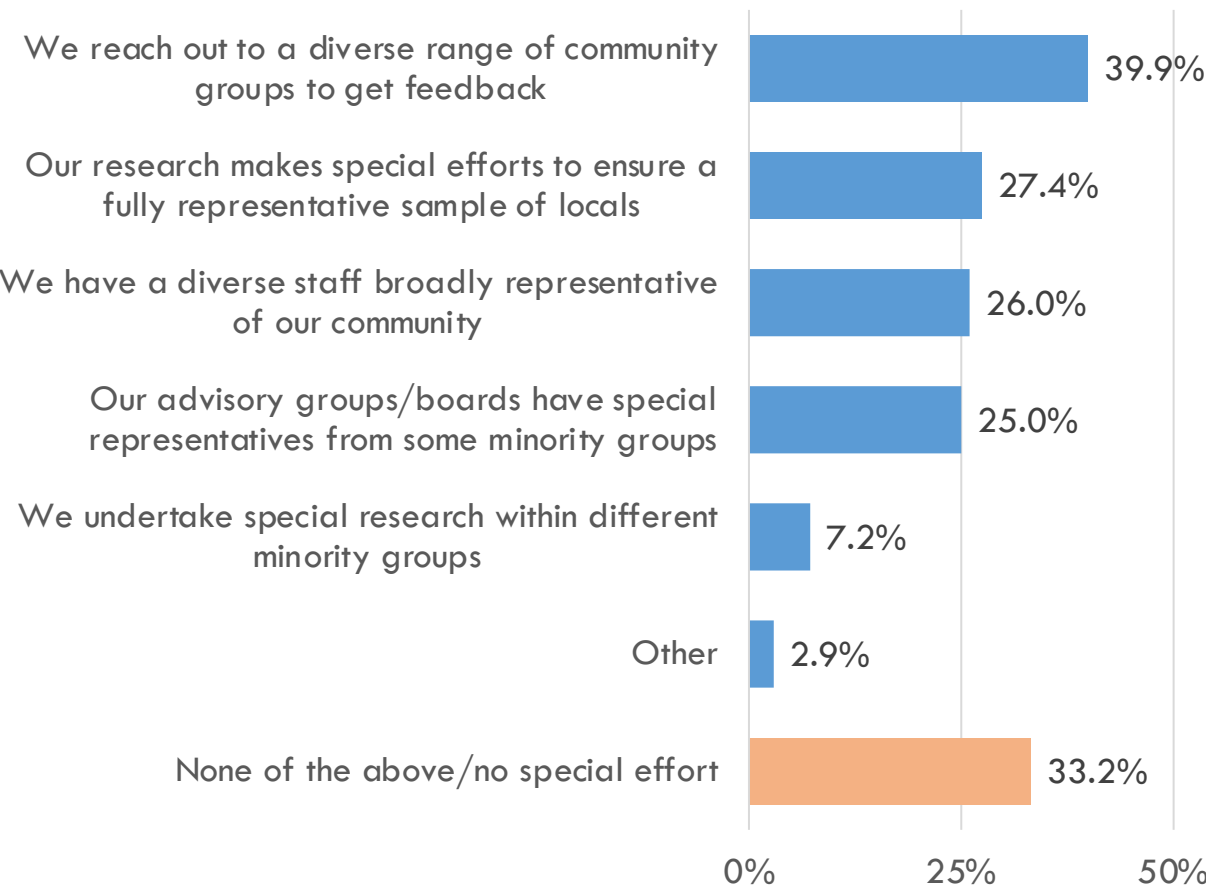




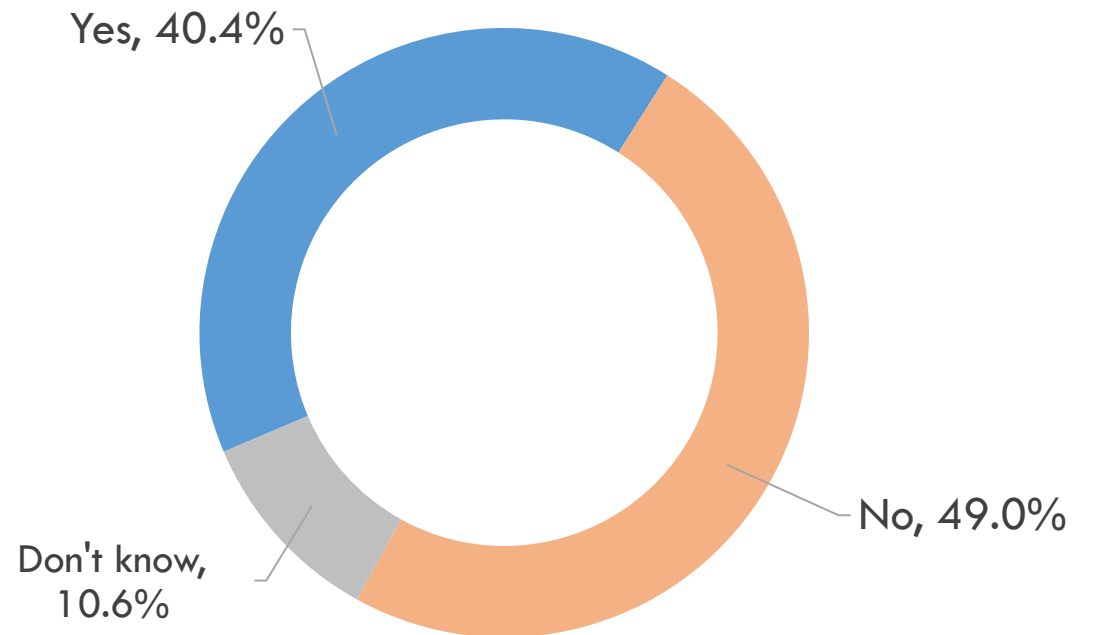
Question: How do you ensure a fully representative view of all local residents - including varied demographic and ethnic groups across your community? Select all that apply.

Base: All respondents.
208 completed responses.

ENSURING A FULLY REPRESENTATIVE VIEW OF ALL RESIDENTS



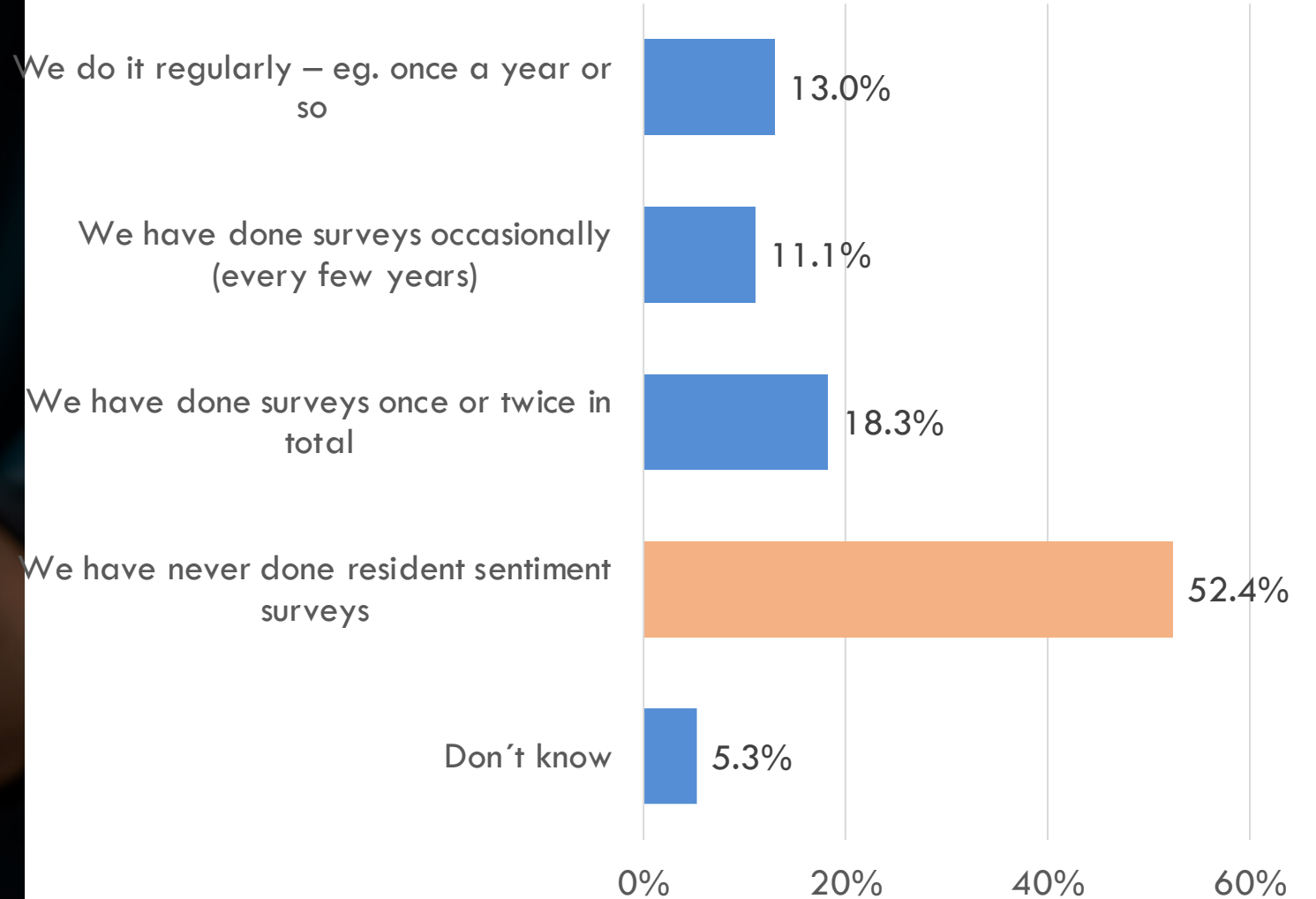
RECENT USE OF ONLINE PLATFORMS TO ENGAGE WITH RESIDENTS



Question: Has your organization recently (past 1-2 years) used online platforms to engage with the public/residents?

Base: All respondents.
208 completed responses.

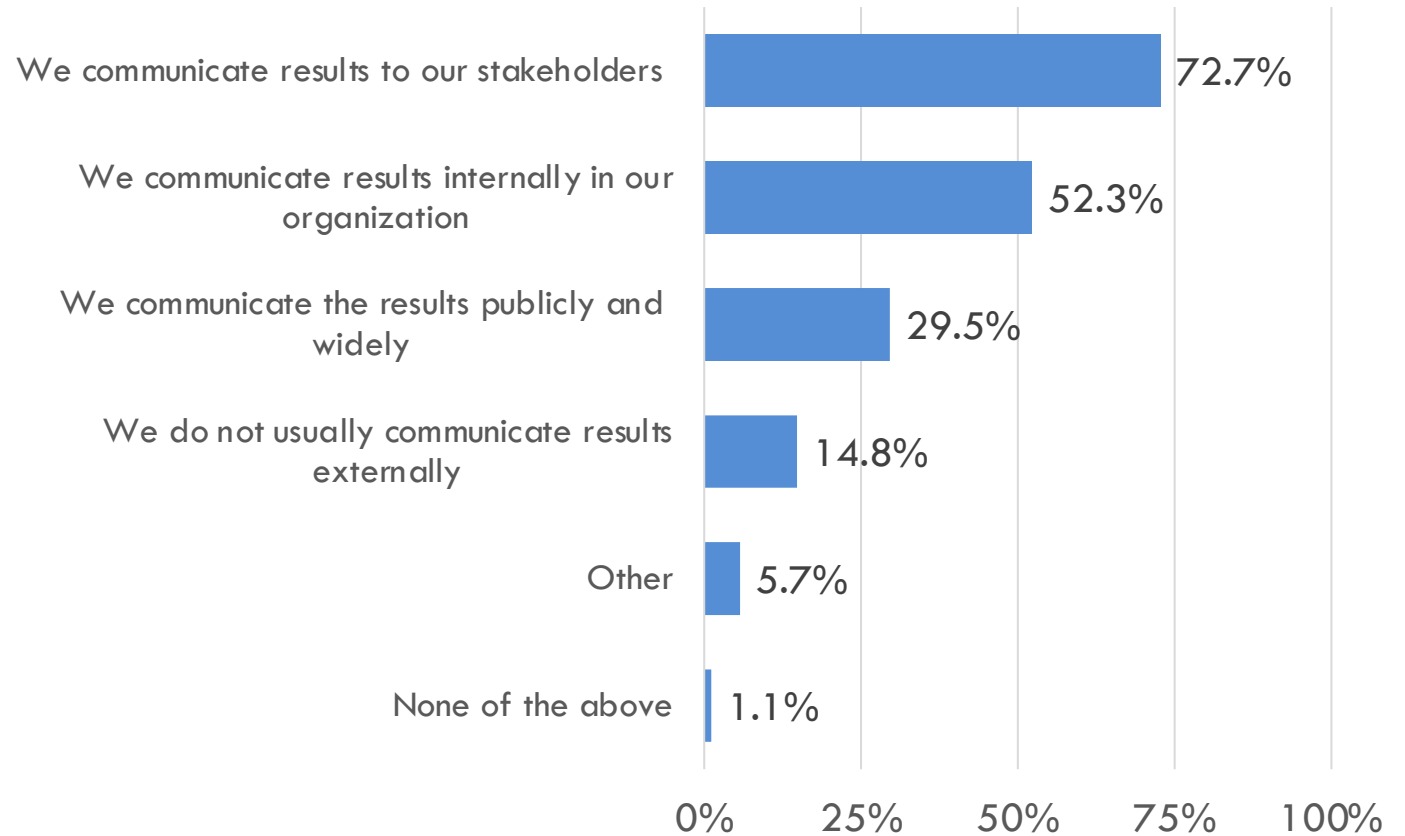
FREQUENCY OF RESIDENT SENTIMENT SURVEYS



Question: How often to you carry out resident sentiment surveys? Select one.

Base: All respondents.
208 completed responses.

COMMUNICATING THE RESULTS OF RESIDENT SENTIMENT RESEARCH



Question: How do you communicate the results of your resident sentiment research? Select all that apply.

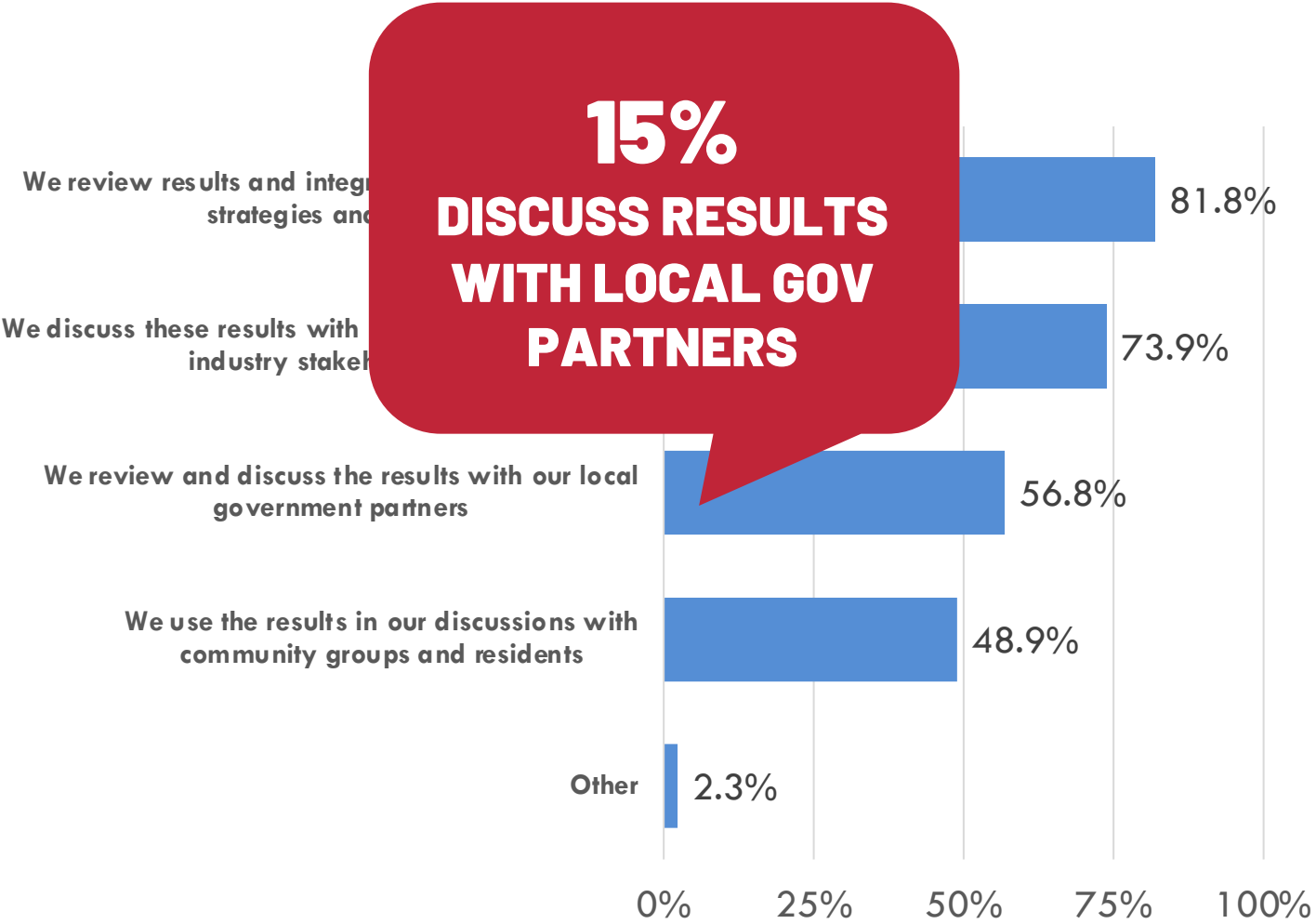
Base: Respondents who have carried out resident sentiment surveys. 88 completed responses.



Question: How do you make use of the results? Select all that apply.

Base: Respondents who have carried out resident sentiment surveys. 88 completed responses.

USING THE RESULTS OF RESIDENT SENTIMENT RESEARCH



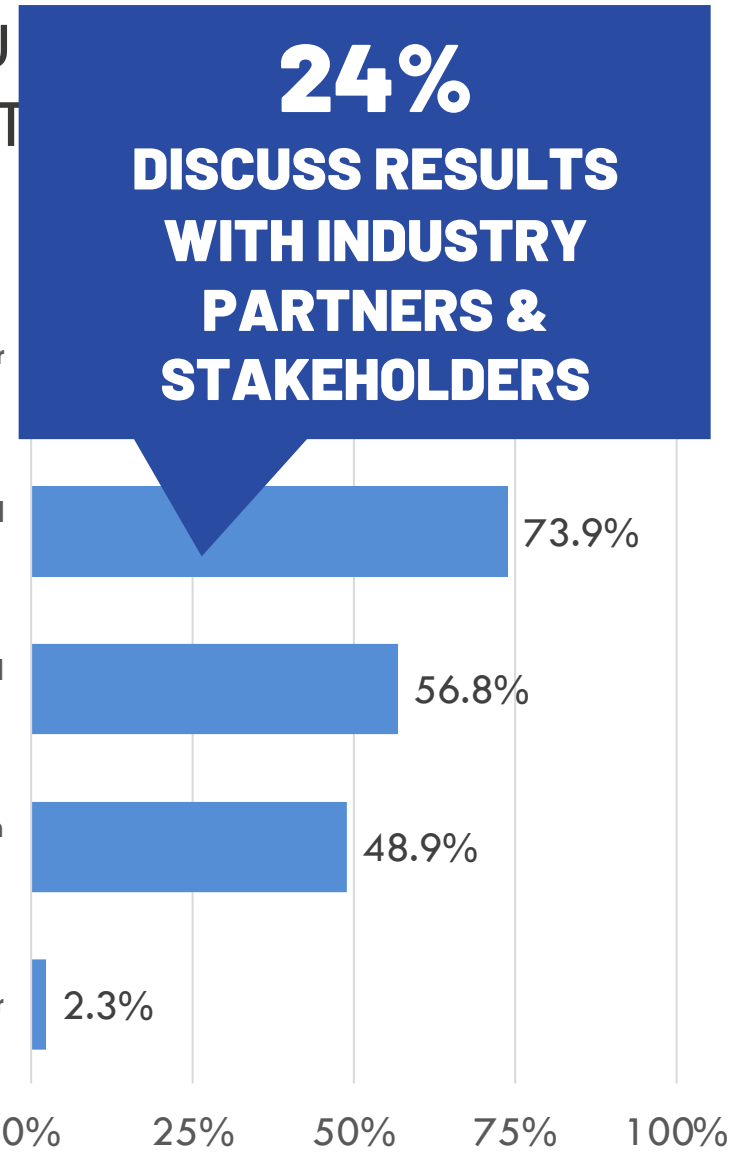


Question: How do you make use of the results? Select all that apply.

Base: Respondents who have carried out resident sentiment surveys. 88 completed responses.

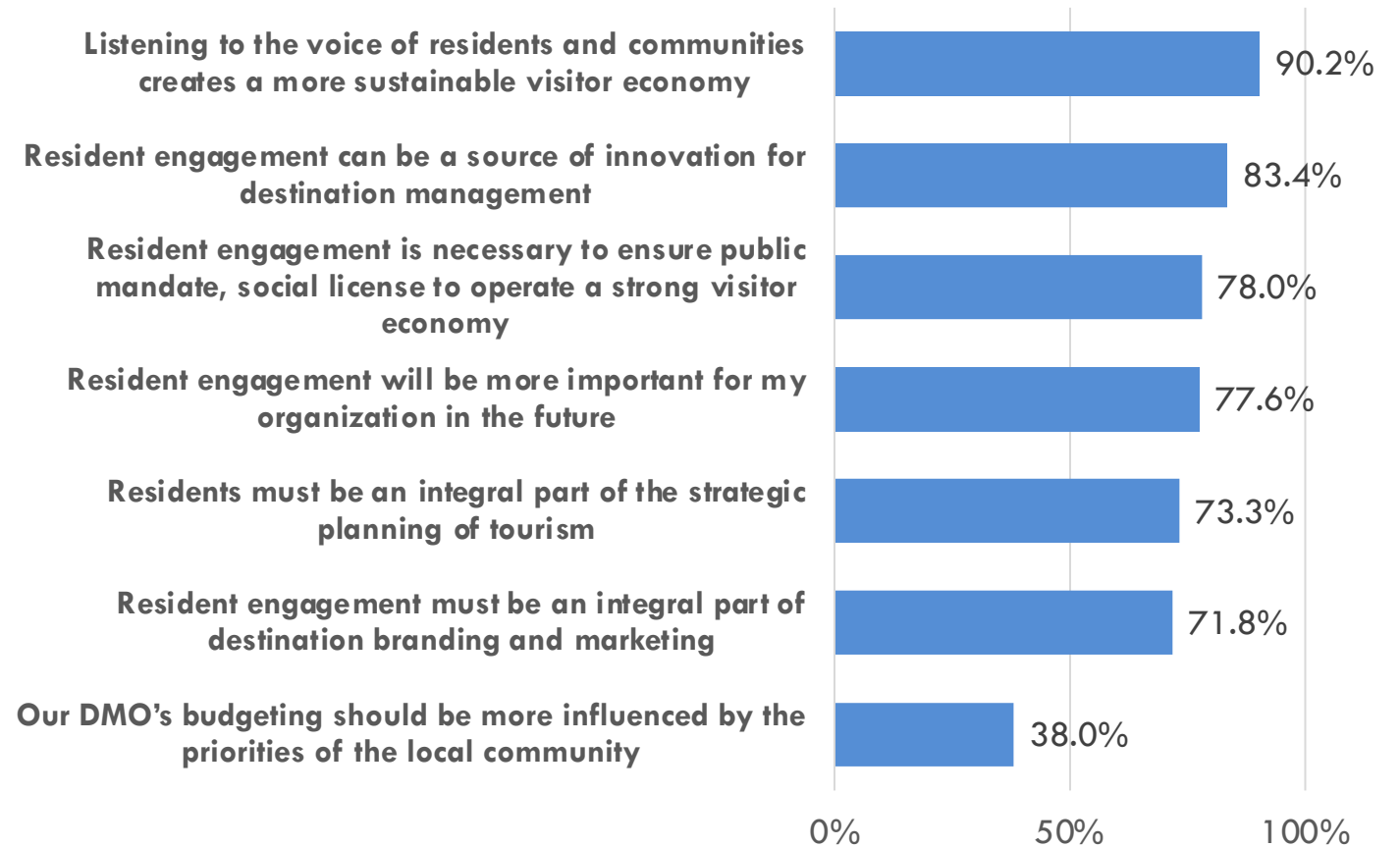
USING THE RESULTS SENTIMENT

- We review results and integrate learnings into our strategies and plans
- We discuss these results with business partners and industry stakeholders
- We review and discuss the results with our local government partners
- We use the results in our discussions with community groups and residents
- Other



ORGANIZATION'S **EXPERIENCE** WITH RESIDENT & COMMUNITY ENGAGEMENT

Top 2 Box Score – % selecting “partly agree” or “strongly agree”

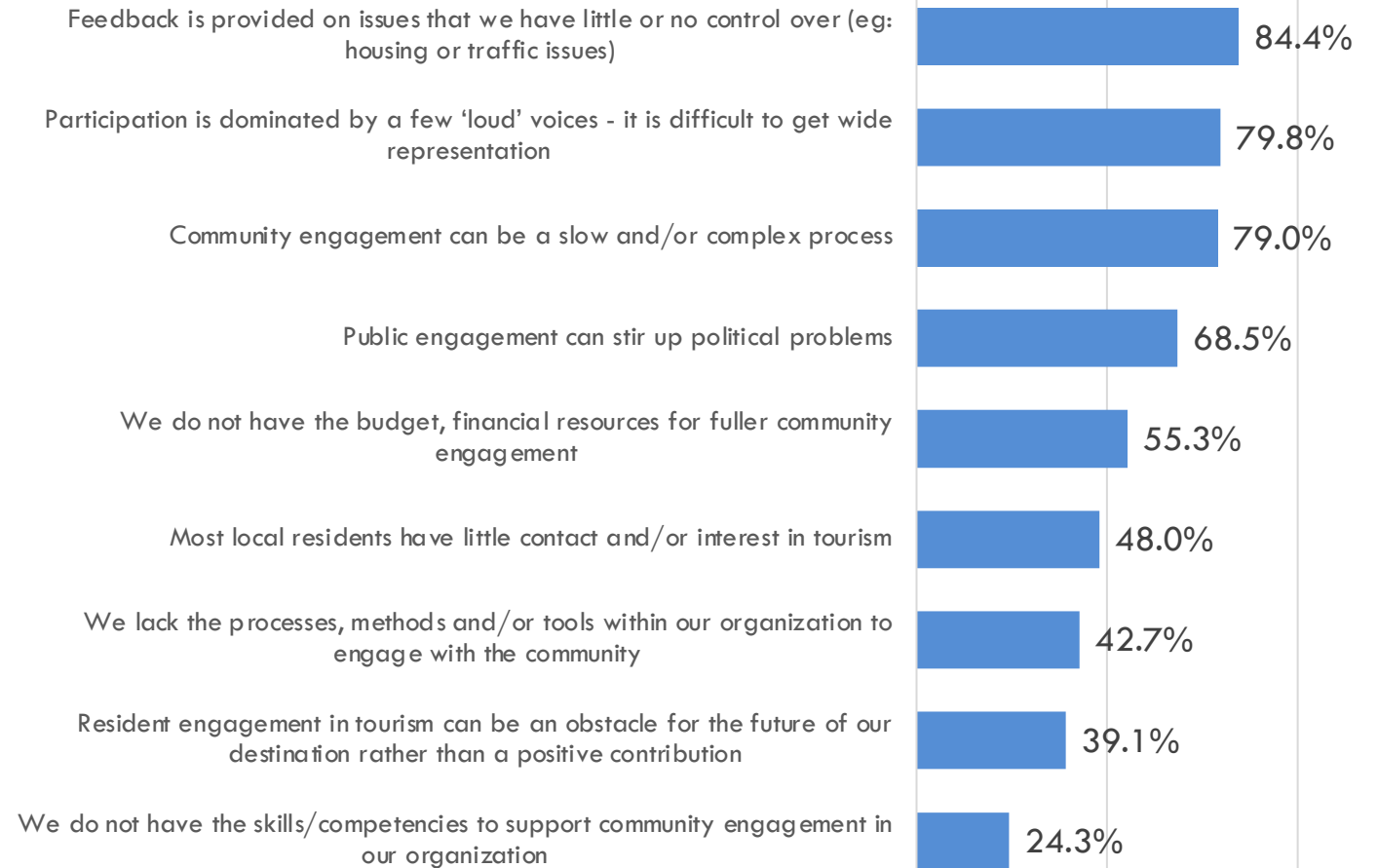


Question: Overall, what is your organization's view and experience with local resident & community engagement? Please answer on a scale from 1-5 (where 5 = strongly agree, and 1 = strongly disagree).

Base: All respondents.
205 completed responses.

ORGANIZATION'S CHALLENGES WITH RESIDENT & COMMUNITY ENGAGEMENT

Top 2 Box Score – % selecting “partly agree” or “fully agree”



Question: Generally speaking, what barriers and challenges do you associate with local resident and community engagement? Please answer on a scale from 1-5 (where 5 = strongly agree, and 1 = strongly disagree).

Base: All respondents.
198 completed responses.



TAKEAWAYS

1. A clear majority of DMOs think that local residents currently see tourism as generally positive
2. But only a minority are undertaking resident sentiment research
3. Smaller numbers have an active plan to seek input of all residents/diverse communities
4. Still modest numbers involved in some destination management areas incl. workforce & STR management
5. DMOs are generally positive about benefits of community engagement programs
6. But concern about influence on budget
7. Stronger engagement (than European DMOs) on sharing & discussing results with partners