North American Edition

TIME FOR DMOCRACY

Summary Report of North American & European Survey of DMOs on Community Engagement Practices & Policies

Sept. 2022. 292 DMO Responses.
Research & Analysis from
Destination Analysts & Miles Partnership

Destination Analysts miles PARTNERSHIP

https://northamerica.timefordmocracy.com

miles PARTNERSHIP With program creator & European lead: GROUP NAO and coreggiogroup Destination Analysts DESTINATION SUSTAINABILITY MOVEMENT TCI Research Tourism Competitive Intelligence

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 & businesses.

You can read more at the program portals: https://northamerica.timefordmocracy.com and https://timefordmocracy.com

Miles Partnership led the North American edition of this global study and worked with a range of agency and association partners in this project, including Group NAO (the program creator and European edition lead), Coraggio Group and Destination Analysts – our research partners on this survey.

We conducted a survey of North American DMOs as part of the Time for DMOcracy project, which took place in July & August 2022. In total, 215 fully completed surveys were collected from Destination Marketing and/or Management Organizations including State/Provincial Tourism Offices, Convention & Visitor Bureaus, Chambers of Commerce and Regional Tourism Organizations.

In Europe, our agency partners conducted a very similar survey of European DMOs in June and July 2022. 77 DMOs responded.

This is a summary report of the results of the North American survey – with some selected insights from the European edition of this survey. The results of the North American study & a fuller summary of the European survey are available at our North American & Global portal.

EUROPEAN DMO SURVEY RESULTS are provided for comparison

Led & Facilitated By:

miles PARTNERSHIP GROUP NAO

In Partnership With:

coraggiogroup

Destination Analysts

GLOBAL DESTINATION SUSTAINABILITY MOVEMENT

TCI Research
Tourism Competitive Intelligence

NORTH AMERICAN DESTINATION PARTNERS

Thank you to our Destination Partners who made this global research study possible in North America:

ASSOCIATION PARTNERS

This survey was supported by a number of leading US, Canadian, and international DMO associations who helped make this survey possible by highlighting and promoting participation in this important research to their members. Thank you.

North American Association Lead Partner:

DESTINATIONS INTERNATIONAL

Supporting North American Association Partners:

SOUTHEAST TOURISM SOCIETY

DMAwest
destination marketing association of the west

TEXAS TRAVEL ALLIANCE
LIFE'S BETTER IN A STATE OF TRAVEL

EXECUTIVE SUMMARY: The Time for DMOcracy project surveyed almost 300 DMOs across North America and Europe on their perceptions and practices in community engagement. The research highlighted that community engagement is seen as a priority by a large majority of both North American and European DMOs – but a lot of work remains to be done. Across all parts of the research a clear gap emerged between aspiration and action. For example 77% of North American DMOs identified community engagement as an important or very important priority but only 13% undertake resident sentiment research at least once a year. Only 17% have a KPI on resident sentiment or community engagement. Action will need to be a combination of meaningful consultation, ongoing research of resident's attitudes and real action on issues relevant to communities (e.g.: congestion, noise, short term rentals & housing). The time to act is now!

RESEARCH TAKEAWAYS

1. A large majority of North American and European DMOs believe that community engagement is an important priority for their organization – and this importance will grow in the future.
2. A clear majority of North American & European DMOs think that most residents currently see tourism as generally positive for their community.
3. But only a small minority are regularly undertaking resident sentiment research to measure this. Very few have resident sentiment or community engagement measures as Key Performance Indicator(s) (KPI).
4. Smaller numbers have specific efforts to ensure all residents/diverse communities are included in their research and community outreach.
5. There is also opportunity to leverage the resident sentiment research more effectively – with stakeholders such as local government and industry partners.
6. While around half of all DMOs report some activities in destination management, only small minorities are active in important community issues including workforce, sustainability & short-term rental management.
7. DMOs identified a range of challenges with community engagement. A minority remain skeptical, most have concerns. The research emphasized the importance of tackling community engagement with the right resources, skills and partnerships to engage effectively & foster real and productive collaboration.
8. A key takeaway is less than 1 in 5 DMOs currently say their residents feel "they have any influence in how tourism is developing and is managed". Building a sense that residents are partners in the future of tourism is at the heart of community engagement – and in building "DMOcracy".

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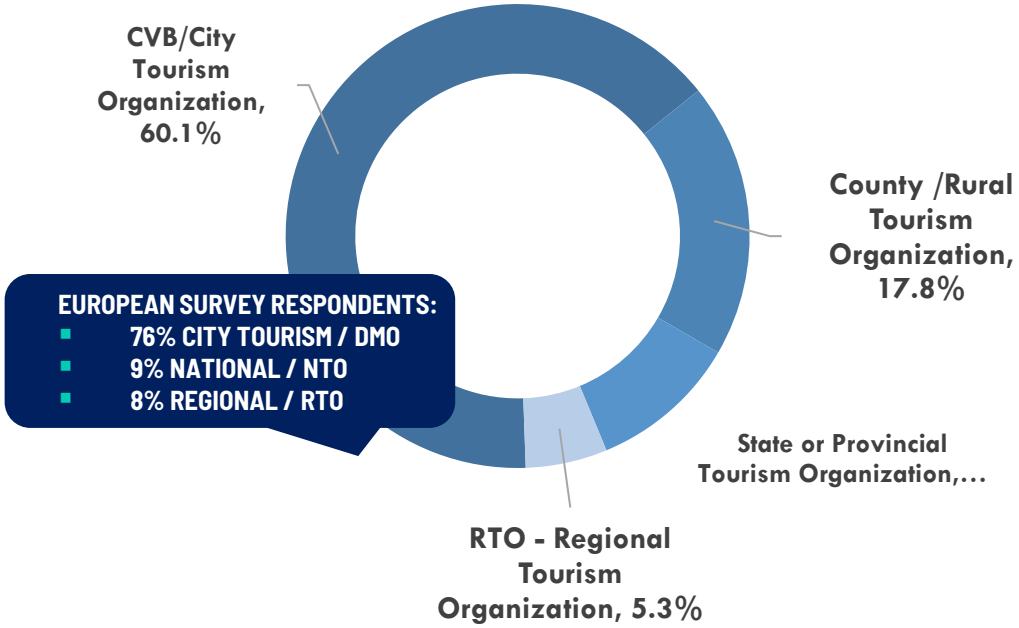
SUMMARY: As part of the Time for DMOcracy global research study we completed a survey of Destination Marketing and Management Organizations (DMOs) on their current and planned community engagement practices and policies. They survey was completed in late July to early August 2022 and surveyed DMOs across North America. 215 DMOs completed surveys. Of these the majority were Convention & Visitor Bureaus (CVB) (60%) with County and Rural Tourism Organizations representing just under 1 in 5 respondents. State and Provincial Tourism Organizations made up just under 10% and Regional Tourism Organizations just over 5% of respondents.

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

Base: All respondents.
208 completed responses.

ORGANIZATION TYPE



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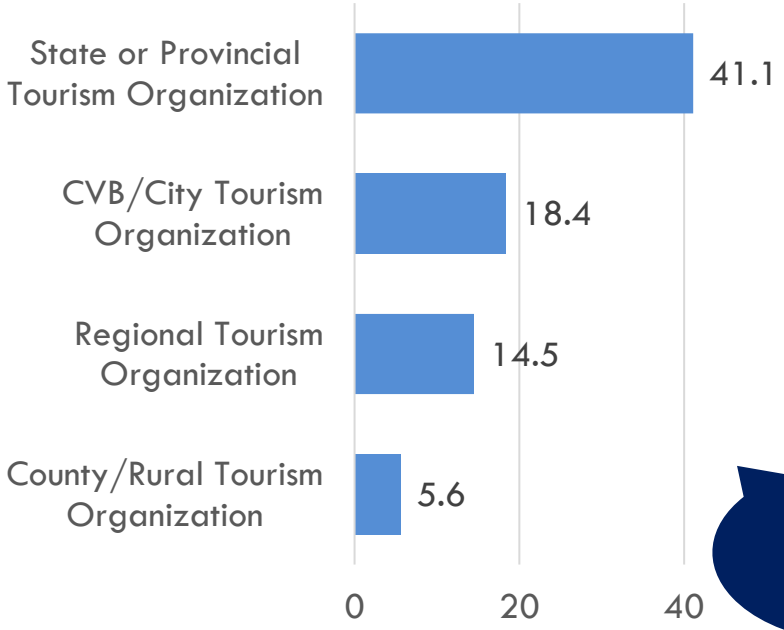
SUMMARY: The responding North American DMOs had a wide range of staff numbers depending on their type. Responding State and Provincial DMOs varied widely in staffing but had an average of over 41 Full Time Equivalent (FTE) staff – over double the average of CVBs which averaged around 18 FTEs. This was less than half the staffing of European DMOs where most of the respondents were CVBs or City DMOs. North American Regional Tourism Organizations (RTOs) and County or Rural DMOs had an average of around 15 and 6 FTE staff respectively.

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



EUROPEAN DMOs:
44
EMPLOYEES (AVE)

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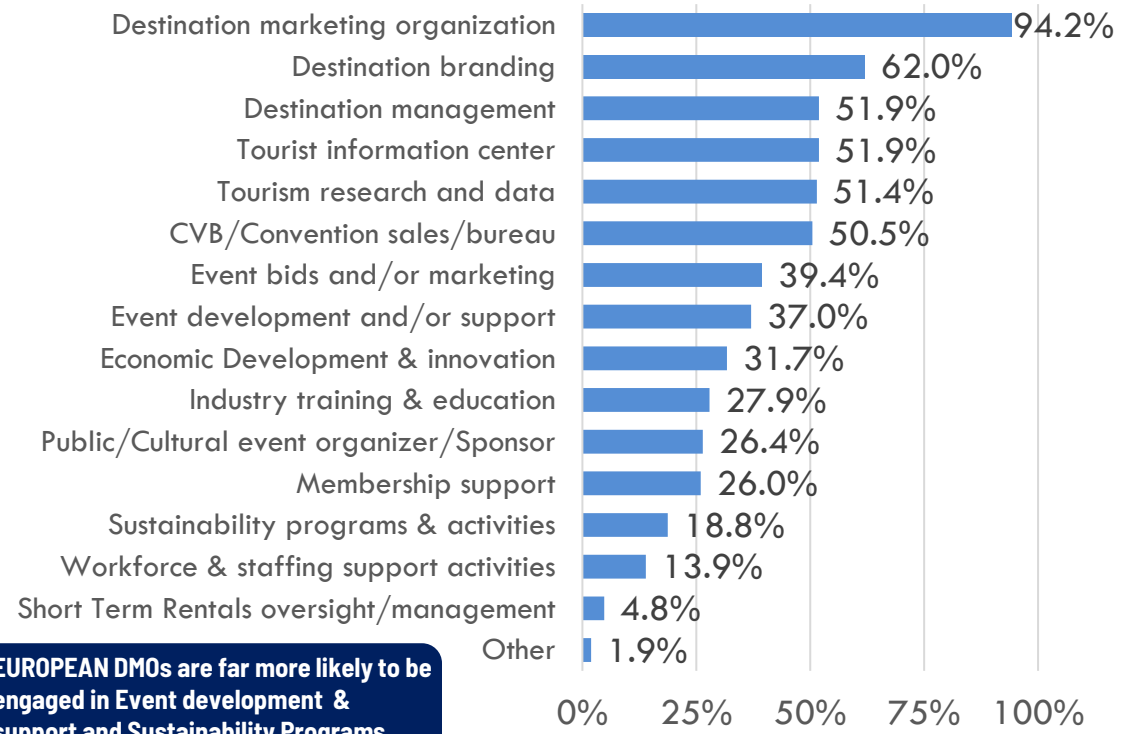
SUMMARY: We surveyed DMOs on their functions, highlighting some fascinating changes from a similar question which was asked in August 2020 & October 2021 as part of our Funding Futures study of 180+ DMOs across North America. This Time for DMOcracy survey (July 2022) highlighted that almost all DMOs (94%) are still involved in destination marketing but a smaller % (62%) are investing in destination branding while destination management related functions have a slightly higher and more uniform commitment from all types of DMOs. An average 52% of DMOs are currently active in destination management functions – including engagement with the local community. But only a small minority are active in areas such as workforce support (14%) or STR management (5%)

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

Base: All respondents.
208 completed responses.

ORGANIZATION'S STRATEGIC FUNCTIONS



EUROPEAN DMOs are far more likely to be engaged in Event development & support and Sustainability Programs

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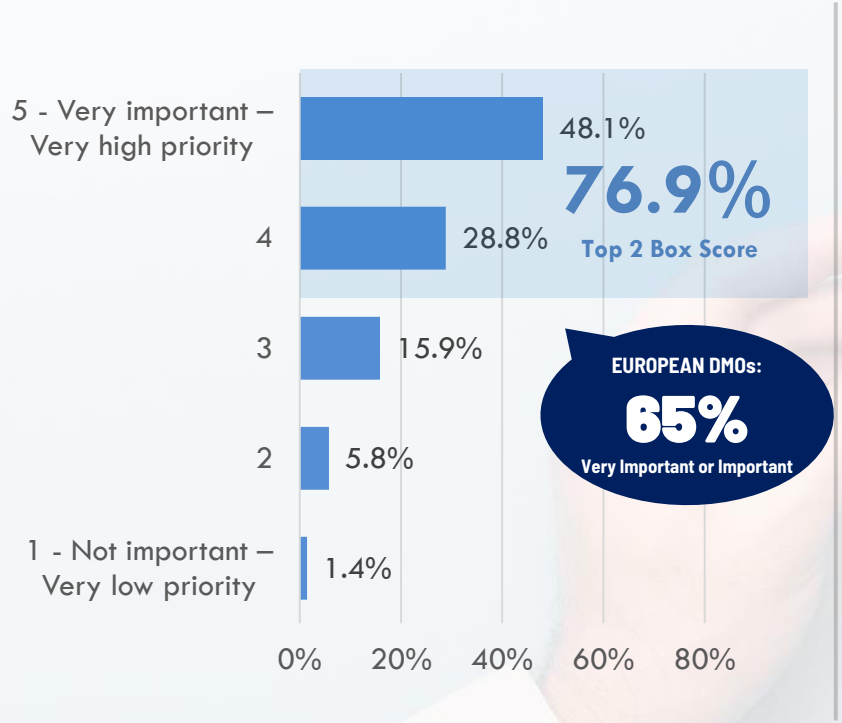
IMPORTANCE OF COMMUNITY ENGAGEMENT



SUMMARY: The survey highlighted that DMOs see community engagement as a high priority. A significant majority (77%) of responding North American DMOs rated community engagement as a very high or high priority "in their organization today". This was higher than European DMOs where 65% rated it at the same level of importance. This reinforced feedback we received through the survey – and the Time for DMOcracy global study, that DMOs are looking to expand their commitment to, and investment in, destination management functions focused on 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.

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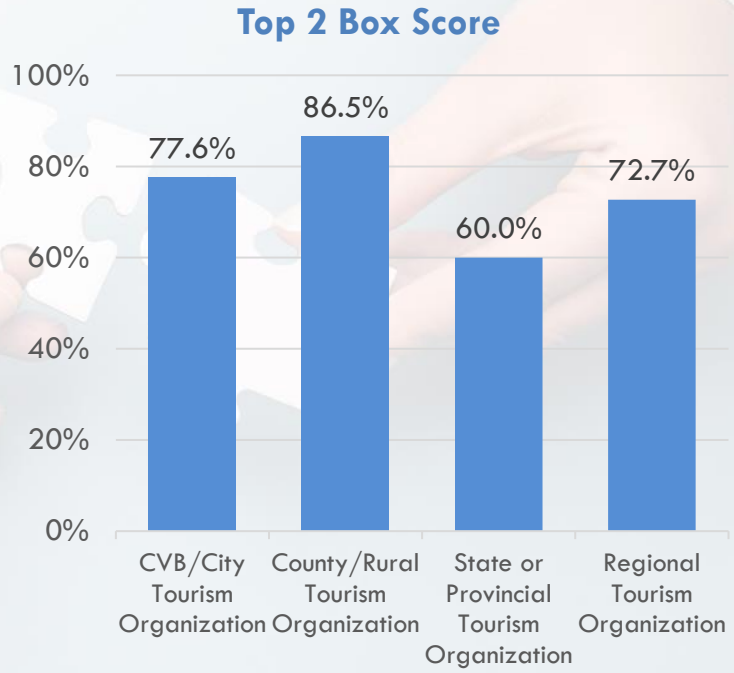
IMPORTANCE OF COMMUNITY ENGAGEMENT

SUMMARY:

County & RTOs/Rural tourism organizations rated it highest with 84% of responding DMOs scoring it as a high or very high priority and State and Provincial Tourism Organizations the lowest, with less than two thirds (63%) prioritizing it in the same way. Small to medium CVBs (those with 9 or fewer staff) also prioritized community engagement as important with 80% ranking it was a high or a very high priority – compared to a slightly lower 75% of large CVBs (10 or more staff), just above and below the average respectively, for all DMOs.



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.

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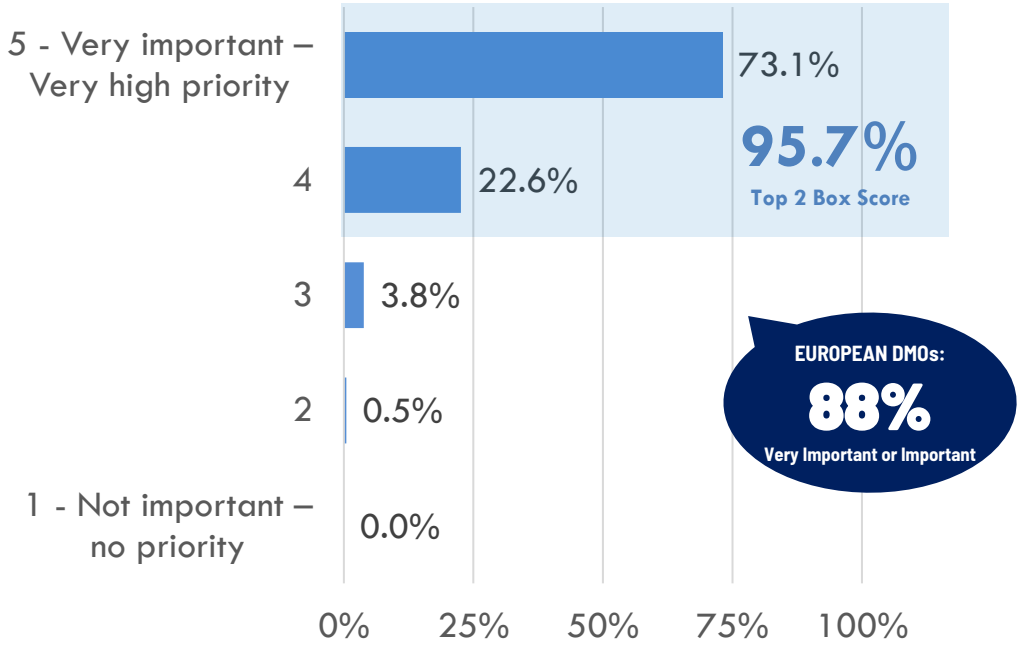
SUMMARY: Despite the importance of community engagement, DMO respondents rated tourism business and industry engagement as even more important. Almost all respondents – 96%, rated this traditional area of CVB focus - industry engagement, as a very important or important priority for their organization. While 96% of CVBs gave industry engagement this ranking, fully 100% of Rural & County Tourism Organizations prioritized this area but just 86% of State and Provincial Tourism Organizations. By comparison, a slightly lower proportion of European DMOs, almost 9/10 (88%), rated industry engagement as important or very important.

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

Base: All respondents.
208 completed responses.

IMPORTANCE OF TOURISM STAKEHOLDER ENGAGEMENT



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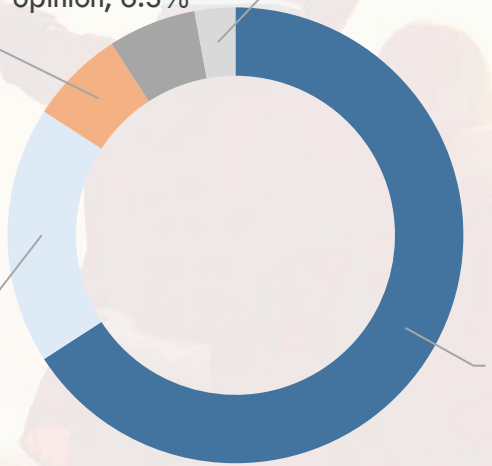
RESIDENTS' PERCEPTIONS OF TOURISM'S IMPACT



SUMMARY: Two thirds (66%) of all North American DMOs believe that their local residents generally see tourism as generating "more positive consequences than negative consequences". This is lower than Europe where three quarters of DMOs felt their local community would have generally have a net positive impression of tourism. Less than one in ten North American DMOs (7%) believe that the opposite is true – that more locals see tourism as a negative in their community. However, this perception is usually based on anecdotal evidence, as only 13% of North American DMOs regularly undertake Resident Sentiment Research and over half have never surveyed their locals (see page 18).

EUROPEAN DMOs:
75%
Think Locals Perceive Tourism Positively

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

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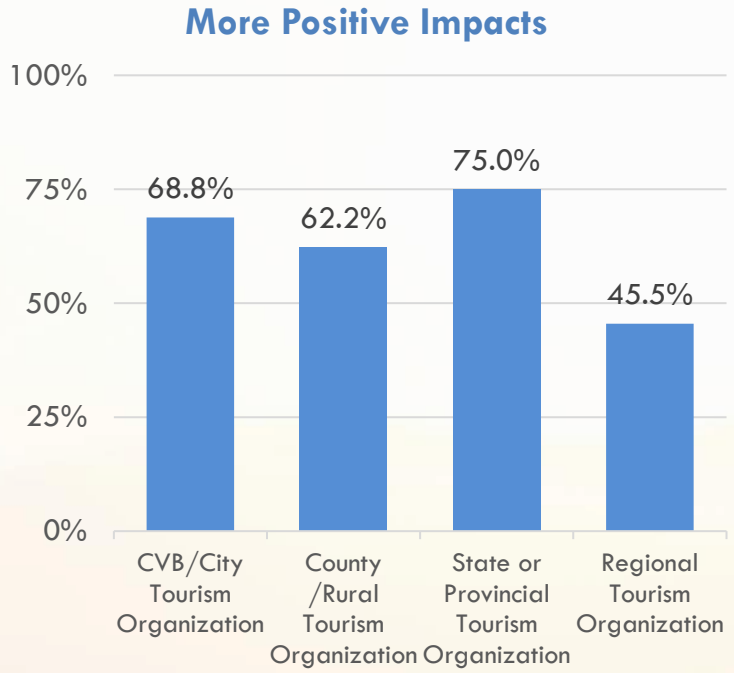
RESIDENTS' PERCEPTIONS OF TOURISM'S IMPACT

SUMMARY: State and Provincial Tourism Organizations had the most positive impression of their local residents' view of tourism – with three quarters (75%) believing that local residents had a "mostly positive" view of tourism's impact in their community. Around two thirds of CVBs (69%) and Rural & Country Tourism Organizations (62%) felt the same way. By comparison under half of Regional Tourism Organizations saw their local residents as having a mostly positive view of tourism with a significant proportion indicating local residents would likely note a mixture of both positive and negative 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.

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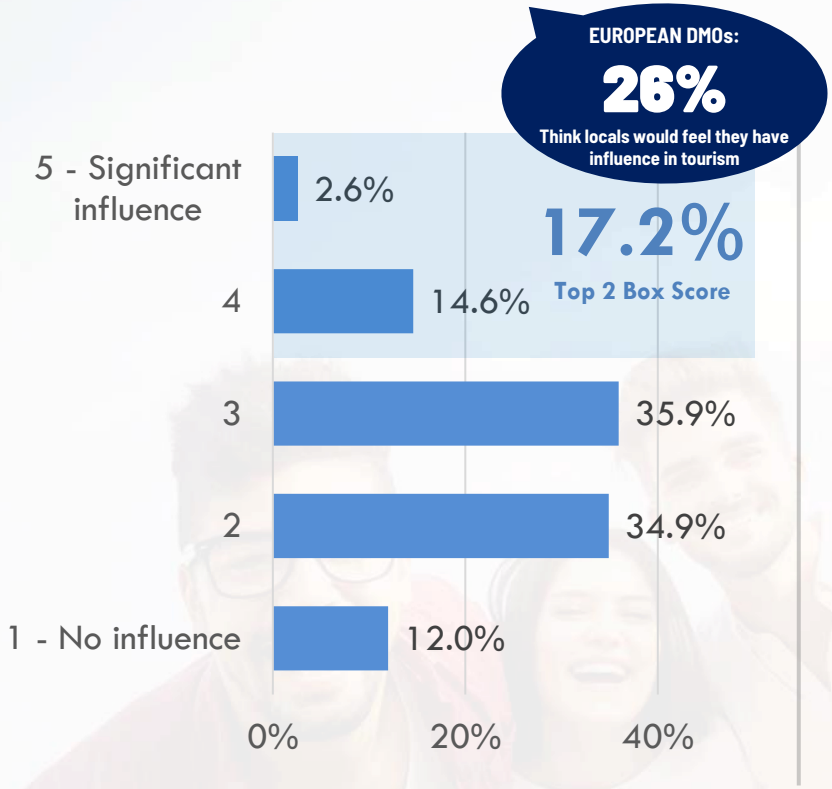
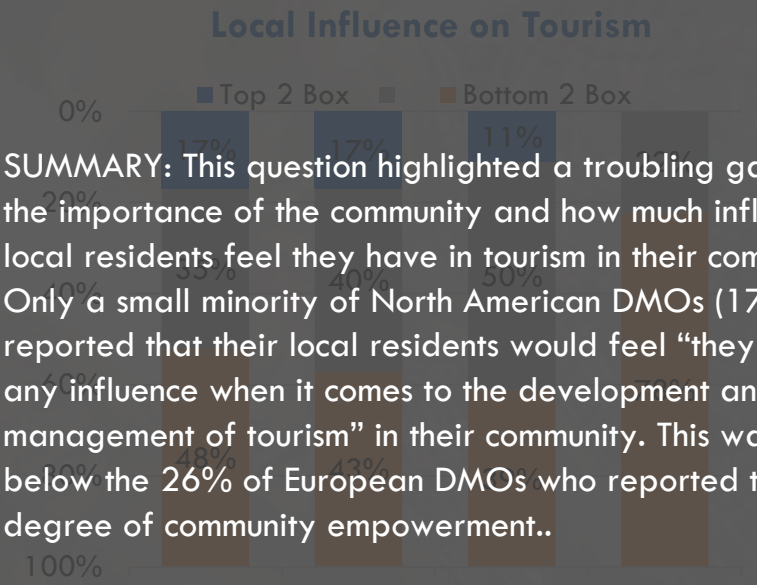
RESIDENTS' FEELINGS OF INFLUENCE ON TOURISM





SUMMARY: This question highlighted a troubling gap in the importance of the community and how much influence local residents feel they have in tourism in their community. Only a small minority of North American DMOs (17%) reported that their local residents would feel "they have any influence when it comes to the development and management of tourism" in their community. This was below the 26% of European DMOs who reported this degree of community empowerment..

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.

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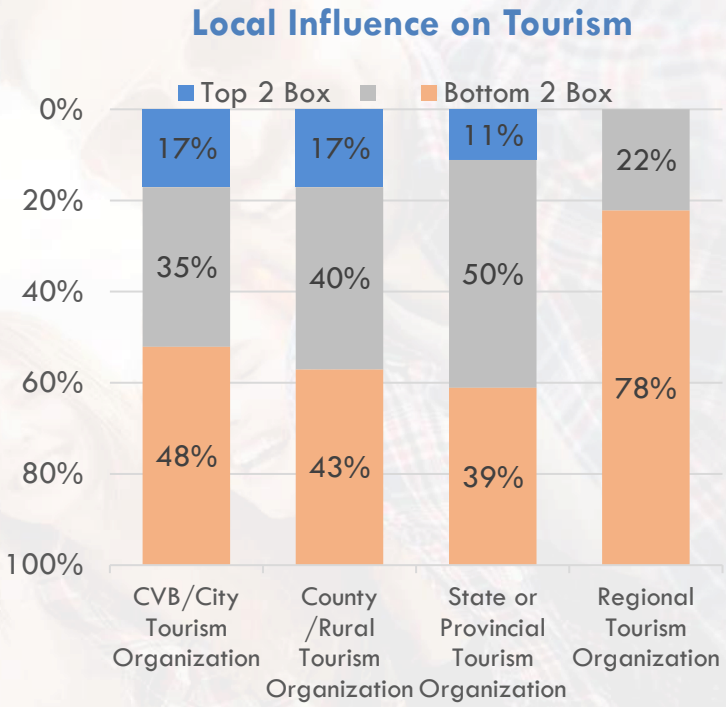
RESIDENTS' FEELINGS OF INFLUENCE ON TOURISM

SUMMARY: Similar to their more negative sense of how tourism is perceived in their communities, Regional Tourism Organizations were the least likely to report local residents would feel they had any influence on the development or management of tourism. CVBs presented a mixed picture. Small to medium sized North American CVBs (those of 9 staff or fewer) were more likely to report their community had a sense of influence in tourism (22% responded in this way). Indicating the benefits of smaller communities, Rural and County Tourism Organizations were also slightly more positive in answering this question. However, larger CVBs (10 staff or more) plus State and Provincial Tourism Organizations, had a more negative view – with just 13% and 10% respectively indicating local residents would feel they have any influence into the development or management of 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.

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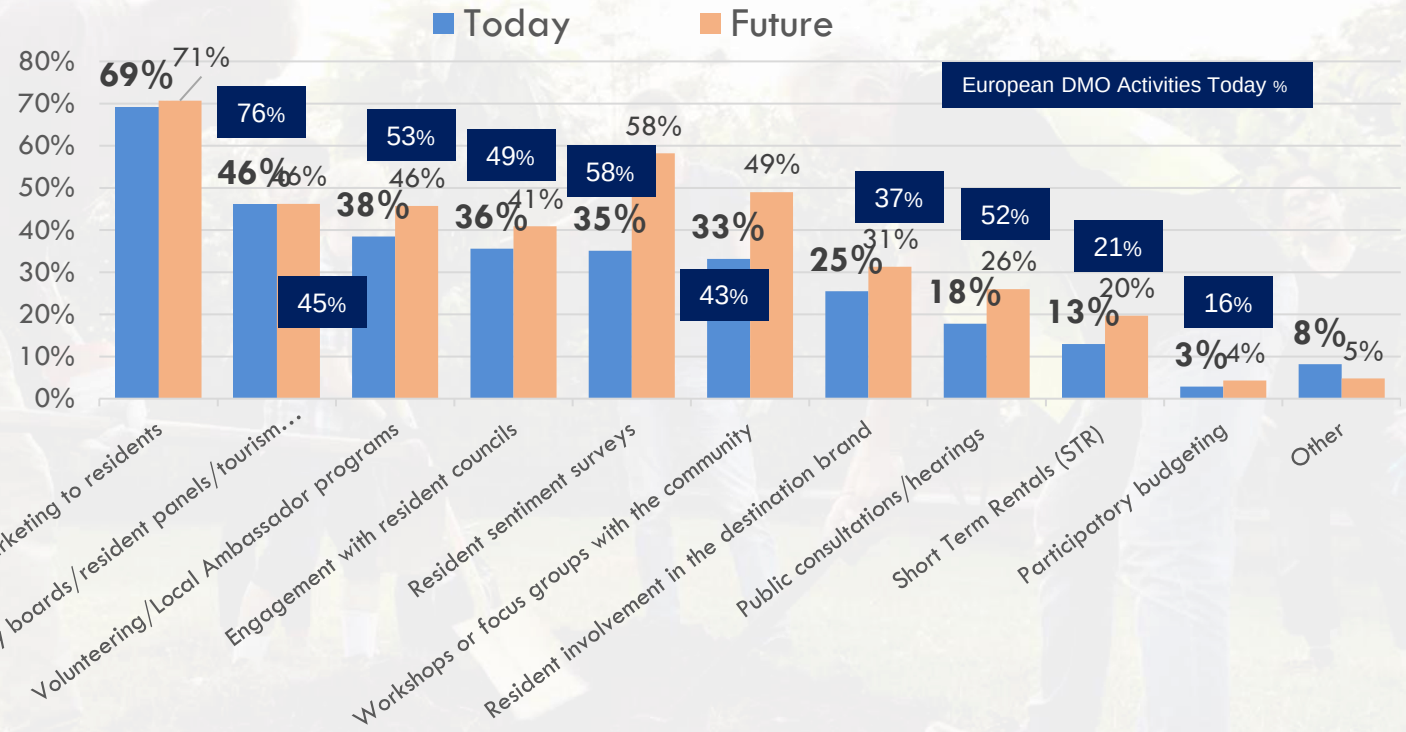
INVOLVEMENT IN RESIDENT ENGAGEMENT ACTIVITIES

SUMMARY: North American DMOs are most likely to be engaged in communications and marketing to locals – with over two thirds (69%) reporting this activity. For all other resident engagement activities only a minority of North American DMOs are currently investing time and effort. European DMOs are more active across a wide range of these 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.

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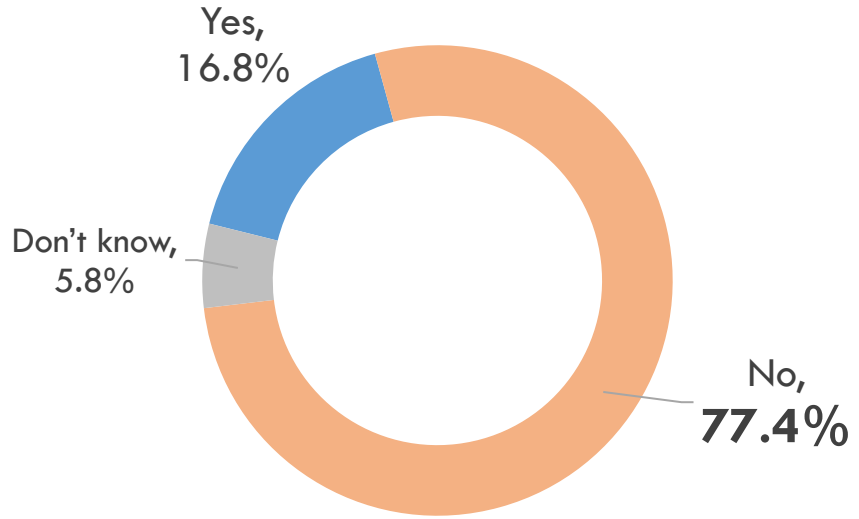
USE OF KPI'S FOR RESIDENT SENTIMENT & COMMUNITY ENGAGEMENT

SUMMARY: The survey also highlighted that most North American DMOs do not have any Key Performance Indicator(s) (KPI) that specifically relate to community engagement and/or resident sentiment around tourism. Over three quarter (77%) of U.S and Canadian DMOs noted that they do not have a community engagement related KPI. Small to medium sized CVBs (9 staff or fewer) were most likely to not have any community related KPI (88%) with larger CVBs the most likely – though this was only 31% of respondents.



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.

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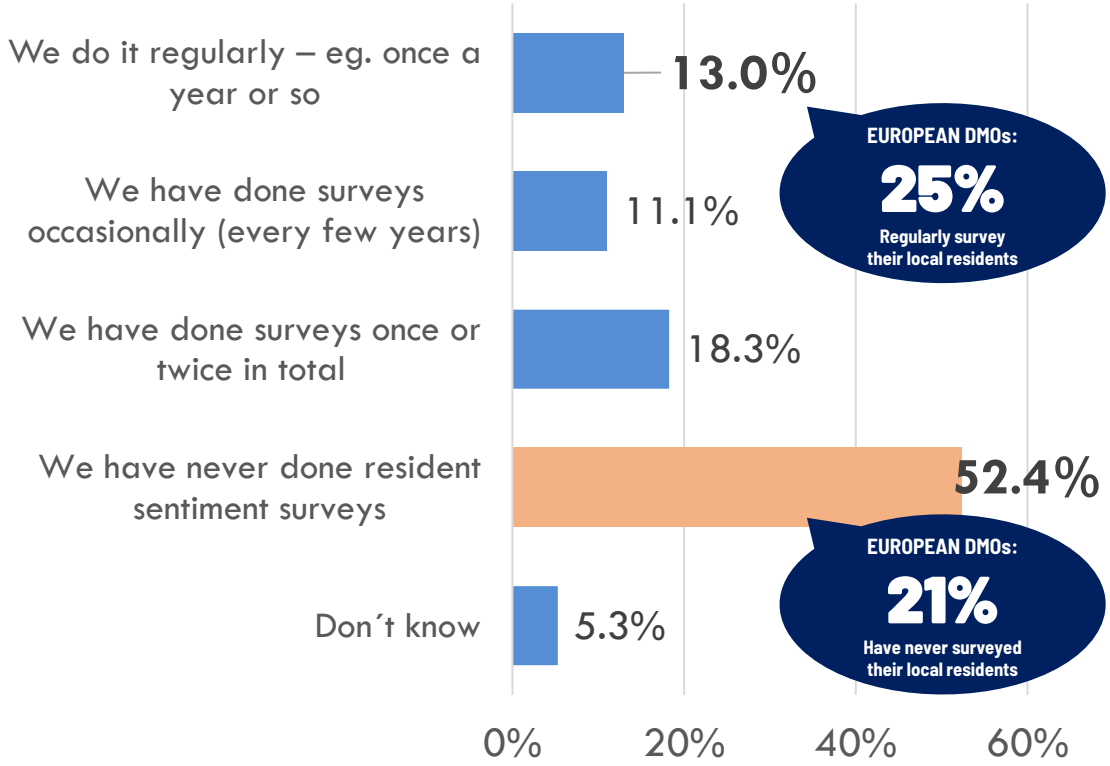
SUMMARY: The lack of KPIs related to community engagement and resident sentiment is linked to the small % of DMOs who are investing in regular resident sentiment research. Just 13% of North American DMOs currently invest regularly in such research ("once a year or so"). Over half of DMOs (52%) have never undertaken resident sentiment research. This compares to just one fifth (21%) of European DMOs never having surveyed their locals. Over twice as many European DMOs (25%) undertake regular research. Small to medium sized U.S & Canadian CVBs are least likely to have invested in research – with just 5% reporting regular resident surveys and over 60% never having undertaken research at all.

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

Base: All respondents.
208 completed responses.

FREQUENCY OF RESIDENT SENTIMENT SURVEYS



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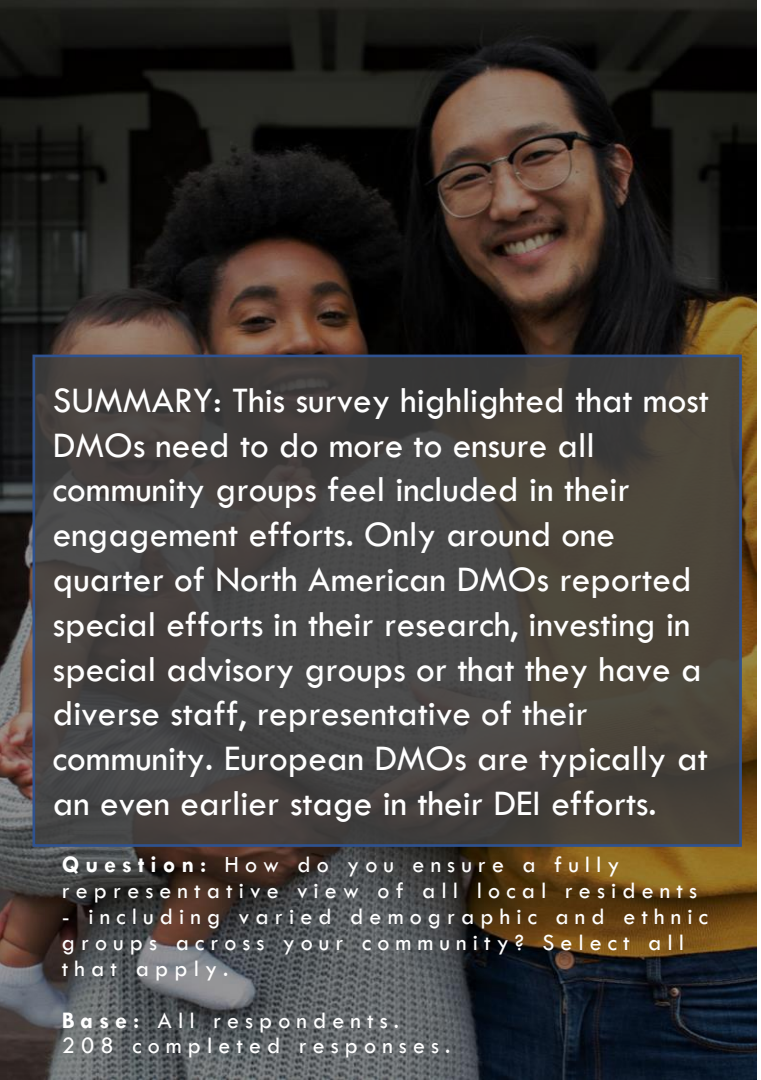
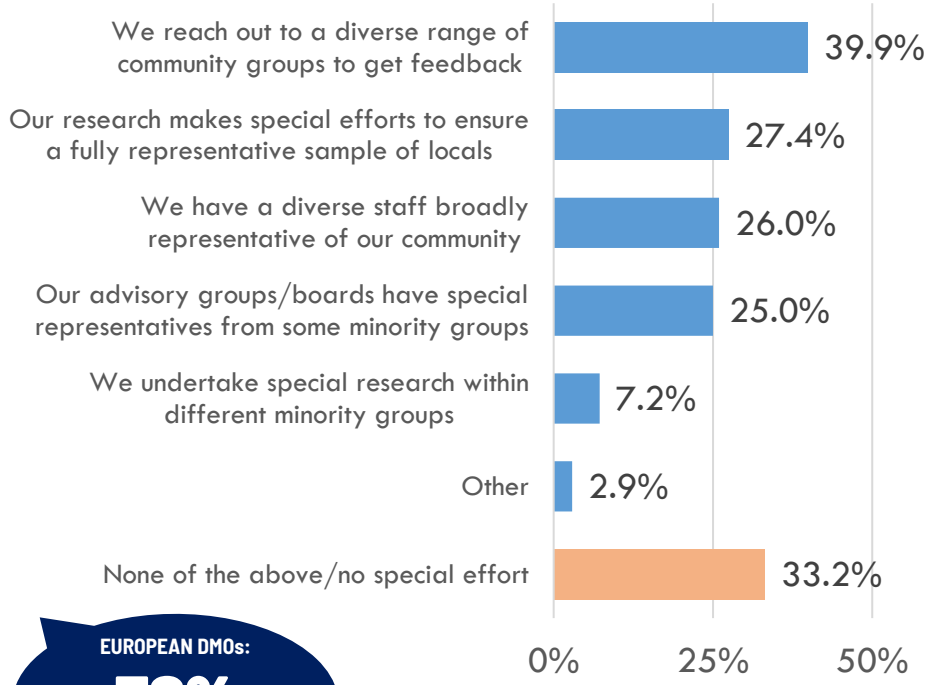


SUMMARY: This survey highlighted that most DMOs need to do more to ensure all community groups feel included in their engagement efforts. Only around one quarter of North American DMOs reported special efforts in their research, investing in special advisory groups or that they have a diverse staff, representative of their community. European DMOs are typically at an even earlier stage in their DEI efforts.

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



EUROPEAN DMOs:

36%

None of the above, no special effort

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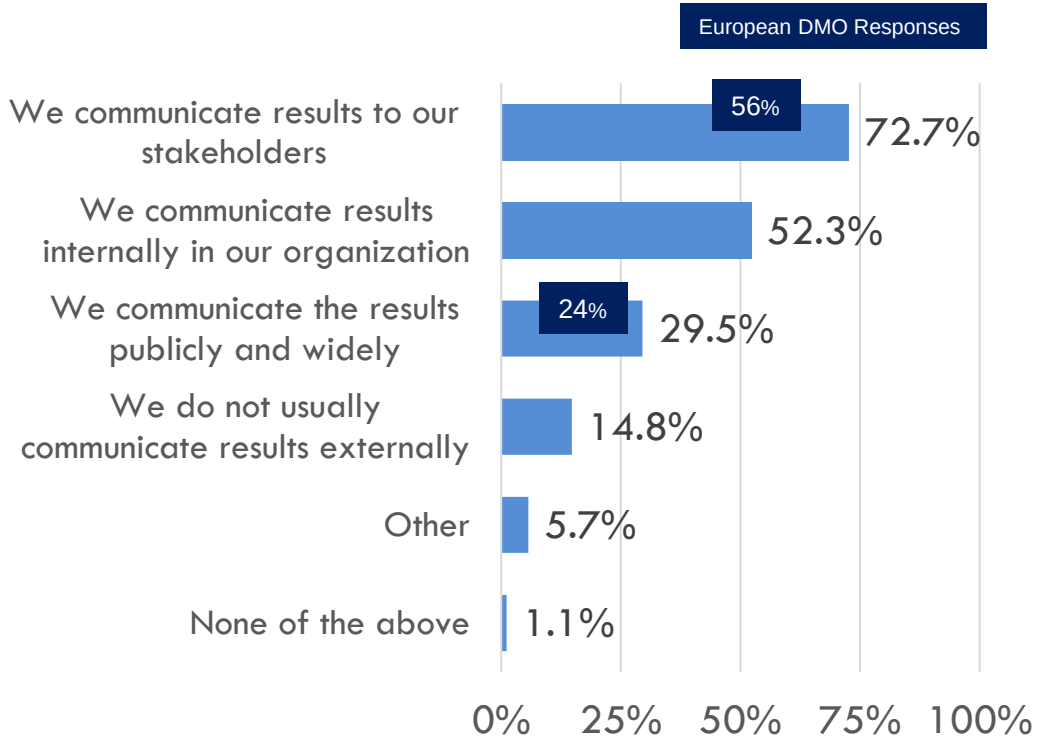
COMMUNICATING THE RESULTS OF RESIDENT SENTIMENT RESEARCH

SUMMARY: Of those DMOs who undertook Resident Sentiment Research, a significant majority (73%) shared the results with stakeholders – but only minority (30%) publicly shared these insights. State and Provincial Tourism Organizations were the least likely to share resident sentiment research publicly. Of the 13 who responded and indicated they undertook resident sentiment research, none (0%), shared the research results publicly. European DMOs were typically even less likely to share the results of resident sentiment research – either with stakeholders or publicly



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.

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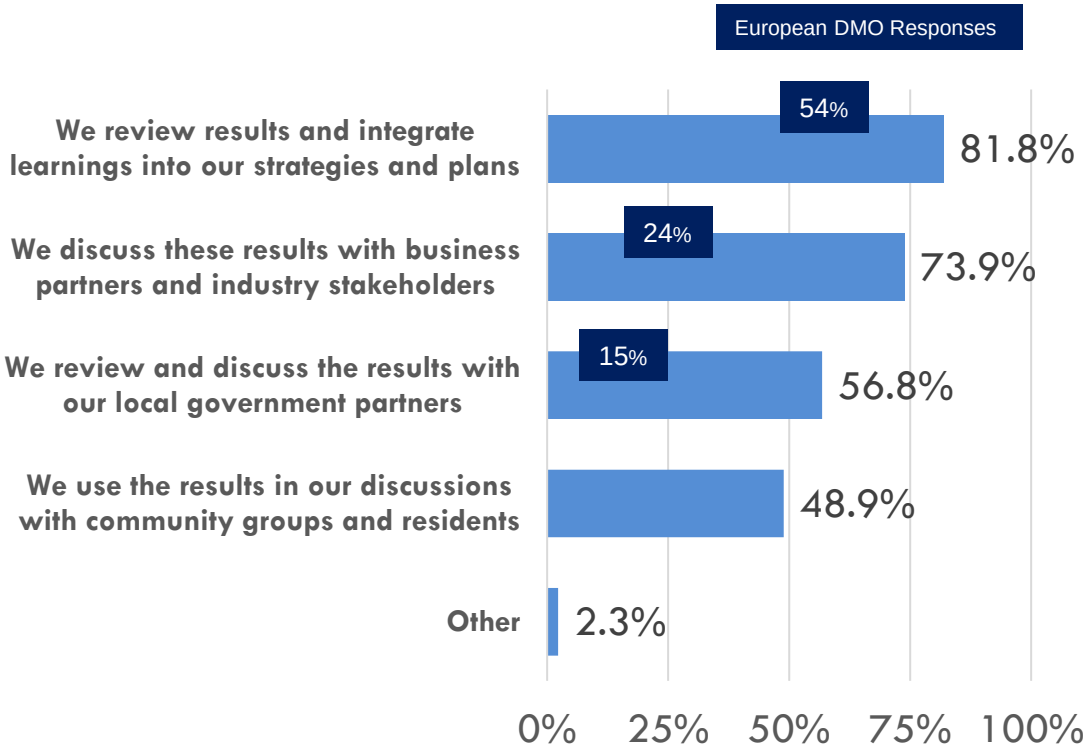
USING THE RESULTS OF RESIDENT SENTIMENT RESEARCH

SUMMARY: North American DMOs overall were less likely to undertake Resident Sentiment Research than their European peers but were more likely to use the research in a range of ways. A significant majority (82%) of North American DMOs who had undertaken resident sentiment research at least one indicated they integrated it into their strategies and plans and 74% discussed with their business and industry stakeholders and 54% with local government partners. Smaller proportions of European DMOs used the research in any of these ways.



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.

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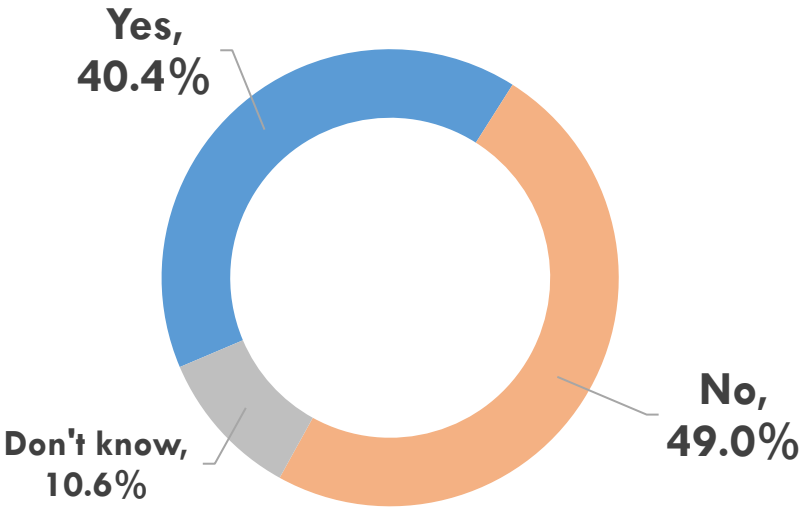
RECENT USE OF ONLINE PLATFORMS TO ENGAGE WITH RESIDENTS

SUMMARY: A significant minority (40%) of North American DMOs report using "online platforms" to engage with local residents – however, only a far smaller proportion are using specialist community participation platforms such as Granicus or CityLab. There was wide variation in the use of online platforms by DMO type. Rural/County DMOs and Small to Medium CVBs were the most likely (49% and 48% respectively) and Large CVBs and State and Provincial Tourism Organizations the least at only 32% and 18% respectively.



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

Base: All respondents.
208 completed responses.

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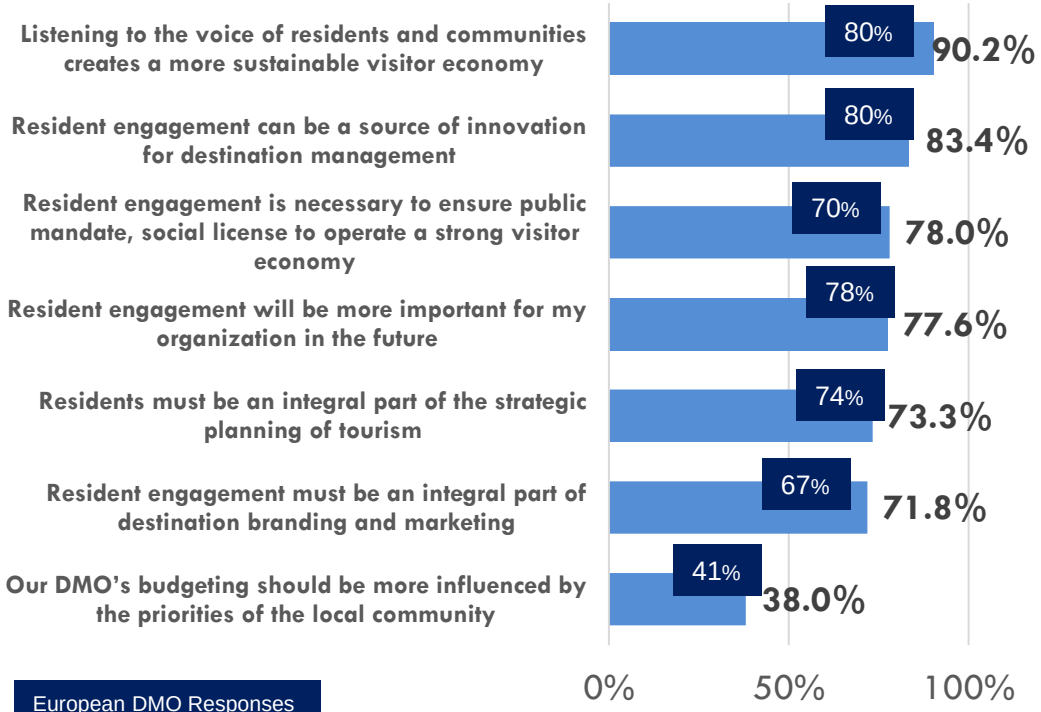
SUMMARY: A significant majority of both North American and European DMOs feel that resident and community engagement is important and valuable. Most believe it will help create a more sustainable visitor economy (90% of North American DMOs & 80% of European DMOs), is necessary to ensure a social license for tourism to operate (78% & 70%) and can be used to help refine and innovate in managing tourism in a destination (83% & 80%). However, across both North America and Europe there is far less support for local community priorities influencing the DMO budgeting process (38% and 43%).

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 **EXPERIENCE** WITH RESIDENT & COMMUNITY ENGAGEMENT

Top 2 Box Score – % selecting "partly agree" or "strongly agree"



European DMO Responses

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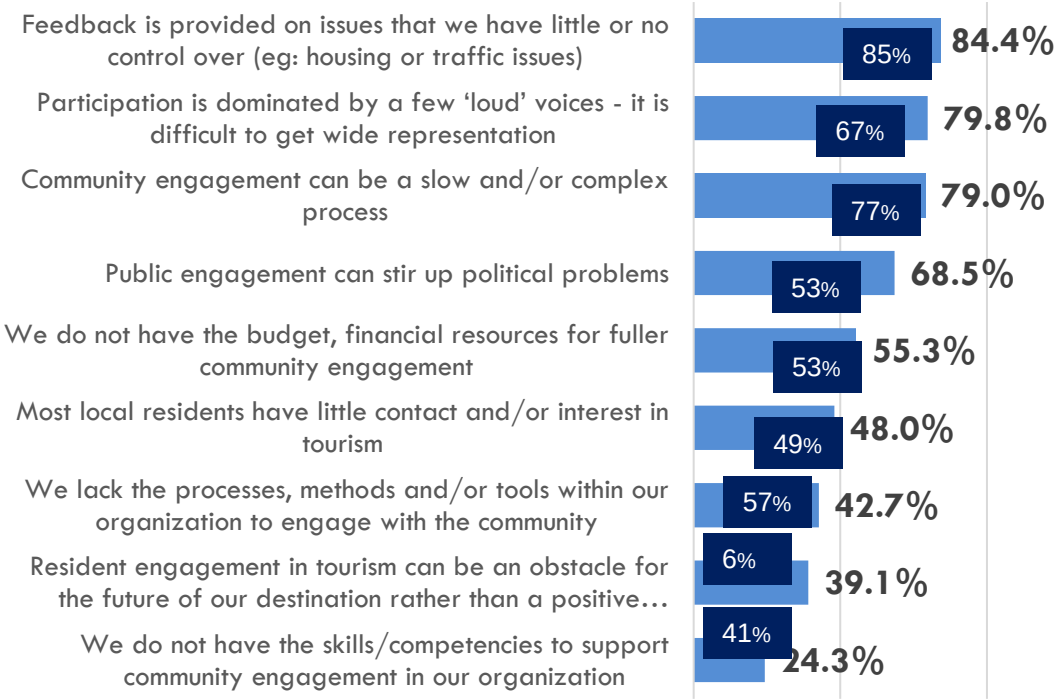
SUMMARY: Most DMOs see a range of challenges in successfully undertaking community engagement. Most North American and European DMOs agreed with at least some of the potential challenges; most notably the lack of DMO control over many of the concerns raised by residents, the slowness and complexity of community consultation and the difficulty of ensuring that a few don't dominate the discussion. North American DMOs were more skeptical than their European peers of the value of community engagement – with almost 4/10 (39%) at least partly agreeing that it "can be an obstacle to the future of our destination" – vs. just 6% of European DMOs.

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.

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

Top 2 Box Score – % selecting "partly agree" or "fully agree"



European DMO Responses

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North American Edition

TIME FOR DMOCRACY

August 2022

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