



EYES ON THE FUTURE

RESULTS OF THE TOURISM TOGETHER
INDUSTRY PARTNER SURVEY

NOV 2022

GROUP
NAO

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FOREWORD

WHY THIS SURVEY?

The purpose of this tourism industry partner survey is to understand the future expectations and demands of tourism industry and business leaders, their future vision and desired direction for Banff National Park as a destination.

Thus, the objectives of the survey are to:

- Provide insights into tourism industry partners' demands, attitudes, and ambitions for the future of the destination as well as the strategic role and vision of Banff & Lake Louise Tourism (BLLT).
- Identify views from industry partners to enrich and inspire the development of a shared vision for future tourism to Banff National Park.

Generally, the survey will help uncover and identify:

- **Perceptions:** How tourism industry partners perceive trends and issues – e.g., new technologies, digitization, visitor segments, climate related issues, labor shortage and talent retention, transportation preferences, concerns of visitor pressure, and general quality of life in Banff National Park.

- **Desired future:** How tourism industry partners transmit these perceptions of possible change factors into opinions on 1) what the desirable future for the destination should look like and 2) what it means for the role and value added by BLLT as an organization.
- **Implications and priorities:** The values we share; What is important moving forward? What should we take extra care of as a destination?



SUMMARY & KEY OBSERVATIONS

A LEADER IN SUSTAINABILITY

Overall, tourism industry partners of Banff National Park (BNP) would like to see it as a world-leading destination in sustainable tourism. More than 8 in 10 industry partners would like to see the tourism industry lead the way and help advance sustainable development and protection of nature and wildlife in the Park. Also 8 in 10 think issues of crowding and “overtourism” should be addressed with better management of visitor flows.

Many industry partners (33%) envision that the future success of the destination should be measured in terms of better quality of life in the communities within the Park – and 75% think there is a role for BLLT to promote better quality of life for everyone living and working in BNP.

KEY OBSERVATIONS

In this survey, the key messages of the 157 tourism industry partners in Banff National Park can be summarized by the following observations:

- **Banff National Park should be the world leader of sustainability in the future:** When asked which long-term aspirations they have for BNP in the future, most industry partners envision the destination as a world leader in sustainable tourism (62%). The second highest ranking vision is to be recognized as a destination that is successful in managing visitor crowds (37%), and the third that the destination will be successful in improving quality of life for residents (33%). 28% envision BNP to excel in visitor experience, and 22% would like to see BNP as a future model for Indigenous tourism.
- **Asking respondents what the future will bring, two things stand out:** First, almost everyone agrees (96%) that nature and wildlife experiences will continue to be in high demand in the future. 92% agree that attracting and retaining labor will require joint efforts. Almost 8 in 10 believe that, in the future, consumers will favour more sustainable experiences and offerings.



SUMMARY // KEY OBSERVATIONS

- **Future readiness:** The problem with the future is that Banff National Park is not really ready for it, according to respondents. Respondents generally rate BNP low in terms of future readiness across the different future factors.

50% believe that the destination is not ready to cater for labor and talents in a joint effort. 40% feel that BNP is also unready to welcome longer stays/ workcations. Almost the same number of respondents see a gap when it comes to making Indigenous culture and heritage an integral part of the destination's offerings and experience.

Most respondents (50%) agree that the destination is well-prepared to welcome visitors that come for nature and wildlife experiences in the future, as well as to welcome guests that travel for well-being, health and balance, and finally to welcome more guests from regional and nearby markets.

- **The greatest concern and future challenge is to attract labour:** When asked what the future will bring, 92% of respondents answer that it will require a joint effort to attract and retain sufficient labour and talent. 80% of industry partners believe labour attraction should be one of the highest priorities of BLLT.

- **On the wish list for BLLT:** 7 in 10 tourism industry partners would like BLLT to prioritize engagement with the community in order to address the negative impact of tourism., Furthermore, respondents would like to see BLLT “monitoring and managing flows and movement” of visitors. Finally, 7 in 10 would like to see BLLT motivate local businesses to adapt to more sustainable business models, and to help advance truth and reconciliation and Indigenous heritage in BNP (61%).

ABOUT THE SURVEY

WHAT WE DID

ABOUT THIS REPORT

This report was produced by Group NAO for Banff & Lake Louise Tourism as part of the Tourism Together process towards a new 10-Year Vision for Tourism in Banff and Lake Louise.

- The survey was designed as an online survey targeting tourism industry partners in the visitor economy of Banff National Park.
- The survey consists of a set of background variables and 5 batteries (multiple statements) - in total: 17 questions, including 5 open questions.
- Data was collected over 4-5 weeks from late February to March 2022 . The link to the survey was sent to 2,000 members and partners of BLLT.
- A total of 157 tourism professionals completed the survey which gives a very modest response rate of just 6%.
- All data has been analyzed and reported by Group NAO.

STATISTICAL SIGNIFICANCE

Due to the limited sample size, the statistical validity of the survey is rather low. For the same reason, data is not broken down into deeper analysis and cross tabs. Results should be read as indicative and interpreted with caution.

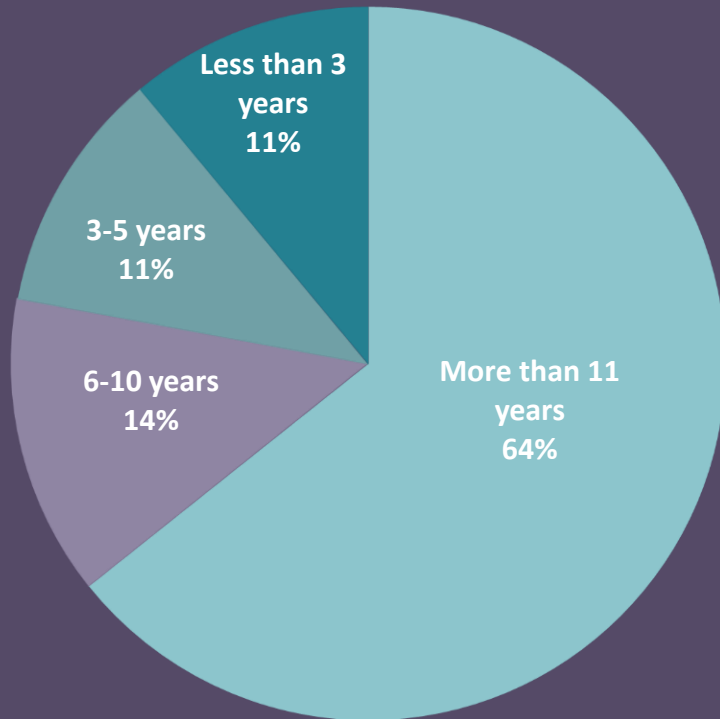
HOW TO READ

- The first section reports on respondents' view on the future – first, what respondents think the future will bring; and second, to what degree respondents think BNP is future-ready as a destination.
- The second part of the report is about the role of the tourism sector in shaping a sustainable future.
- Finally, in part 3, respondents share what they would like Banff & Lake Louise Tourism, as an organization, to prioritize in the future.

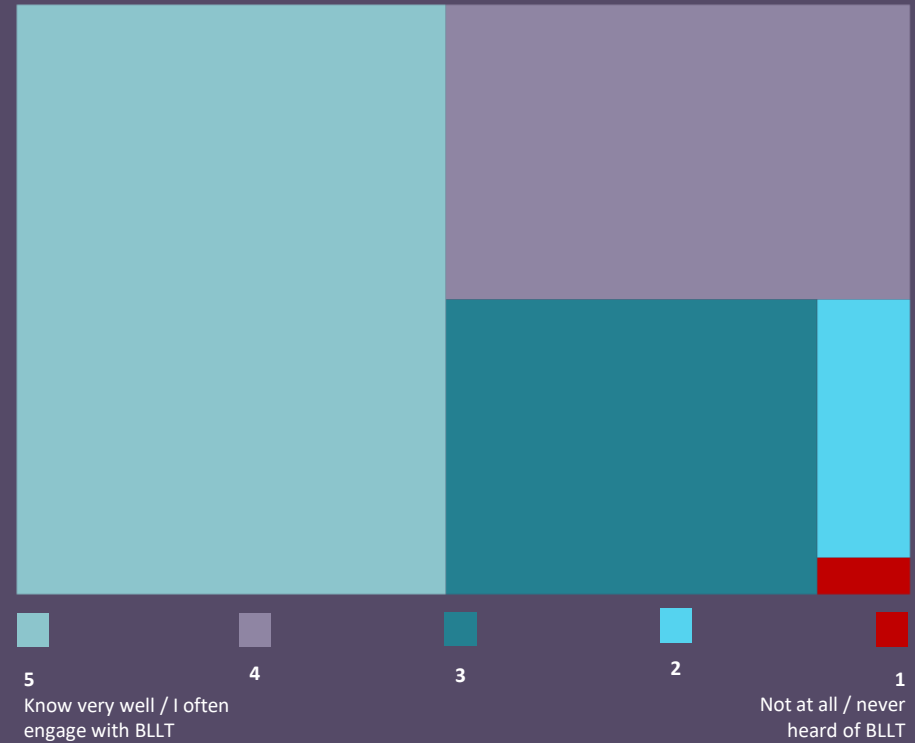


FINDINGS: WHO PARTICIPATED?

HOW LONG HAVE YOU LIVED, WORKED, OR DONE BUSINESS IN BNP?



HOW WELL DO YOU KNOW BANFF & LAKE LOUISE TOURISM? (Scale from 1-5)



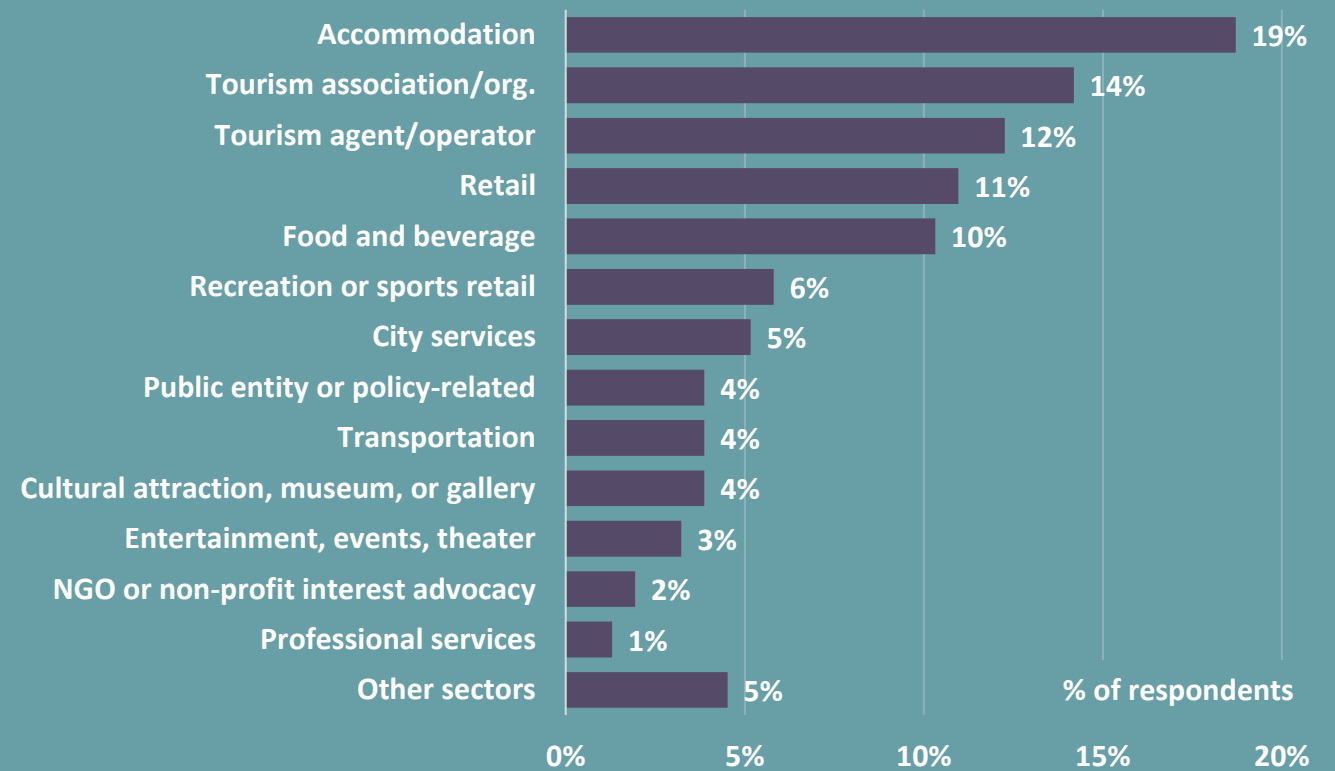
CORE BRANCHES OF THE VISITOR ECONOMY

THE SAMPLE: TOURISM BUSINESSES OF BNP

The survey was designed as an online survey targeting businesses and organisational tourism industry partners in the visitor economy of Banff National Park. The link was distributed to members and partners of Banff and Lake Louise Tourism.

The 157 responses distributes broadly on all branches of the visitor economy as can be seen in the chart.

TO WHICH SECTOR DO YOU PRIMARILY BELONG?



n = 157

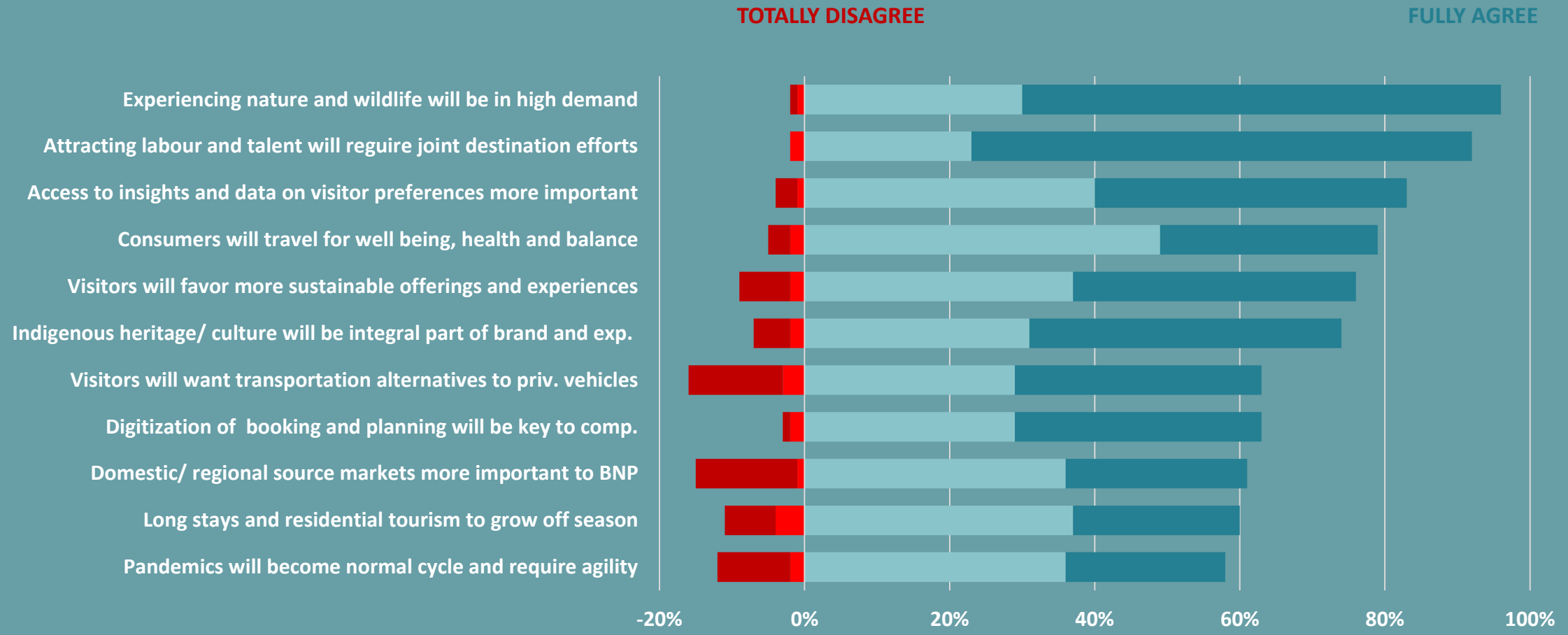


PART 1: VISION FOR THE FUTURE

*What tourism industry partners imagine change
will look like?*

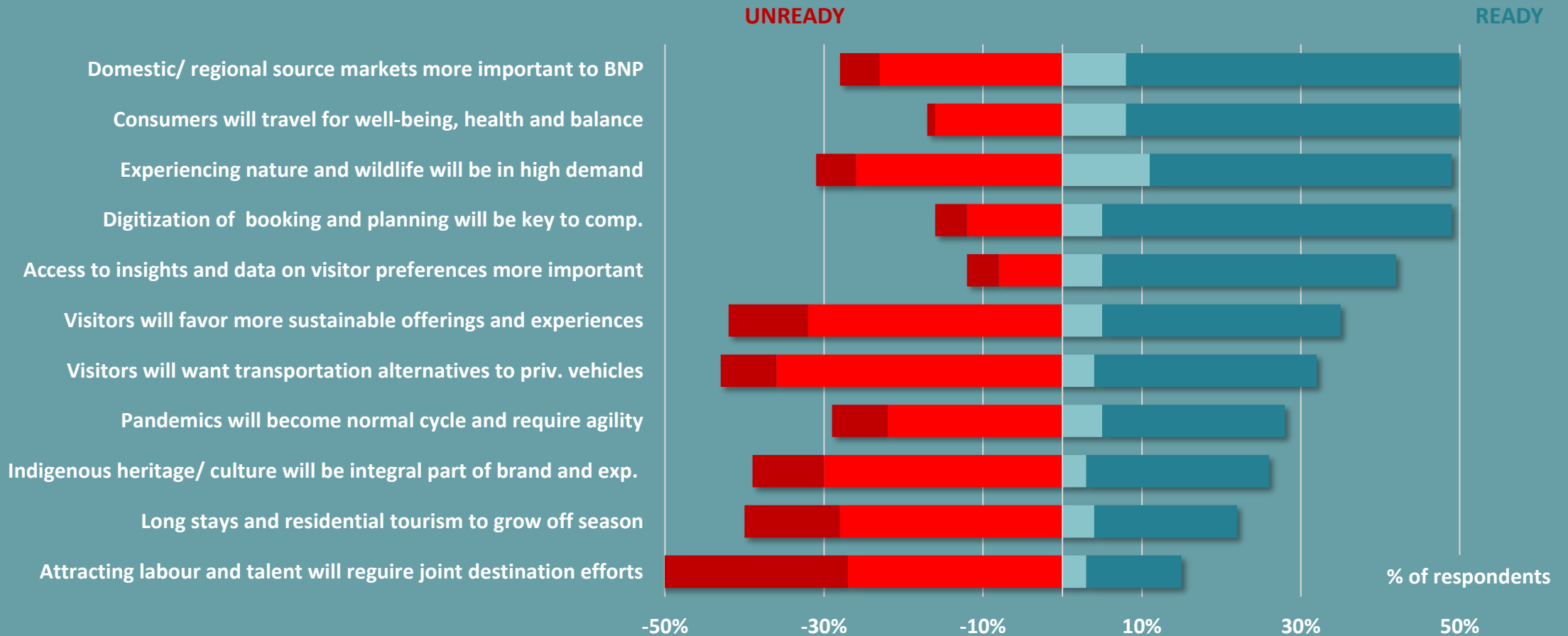
WHAT CHANGE WILL LOOK LIKE

In the next 10 years, we will see... (please indicate how much you disagree)



AS A DESTINATION, IS BNP FUTURE READY?

Do you feel BNP is ready and equipped to address these trends and changes in the coming 10 years? (Scale from 1-5)

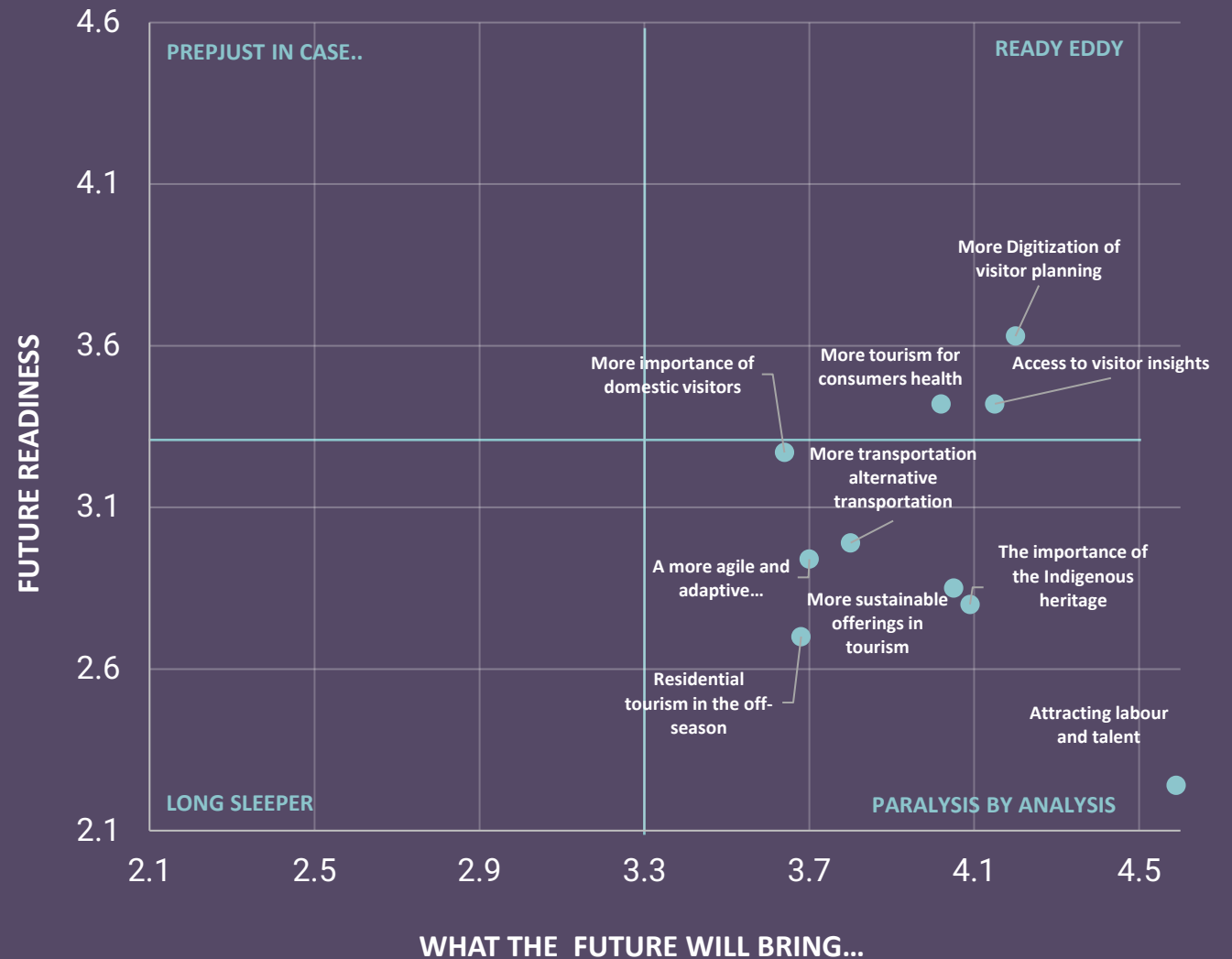


FUTURE READINESS VS FUTURE FORESEEN

Future readiness: The chart mirrors what trends and changes the respondents see in the horizon with their assessment of the destination’s future readiness on the same parameters.

It is clear that respondents generally rate BNP low in terms of future readiness on most of the future trends.

For instance, “attracting labor and talent” scores very high on the respondent’s future expectations (horizontal axis), but very low on the future readiness (vertical axis).



INDUSTRY PARTNERS' FUTURE VISION



Which of the following vision statements best reflect your long-term aspirations for BNP ?
(Max 3 choices)



HOW TO BE A LEADER IN SUSTAINABILITY



"We will recognize ecological and visitation limits and accept a less exploitative model of tourism"

"Sustainable tourism should be founded in environmental science. Recognize limits and work from there"

"Making sure locals live a quality lifestyle, with a balanced focus on tourism"

"Less short haul, more long haul visitors"

"Affordable stays for all budgets. The Park belongs to everyone, not just the rich"

"Sustainable tourism should be founded in environmental science. Recognize limits and work from there"



PART 2: ROLE OF THE TOURISM SECTOR

What should be the future role and priorities of the tourism sector?



HOW TOURISM SHOULD LEAD...

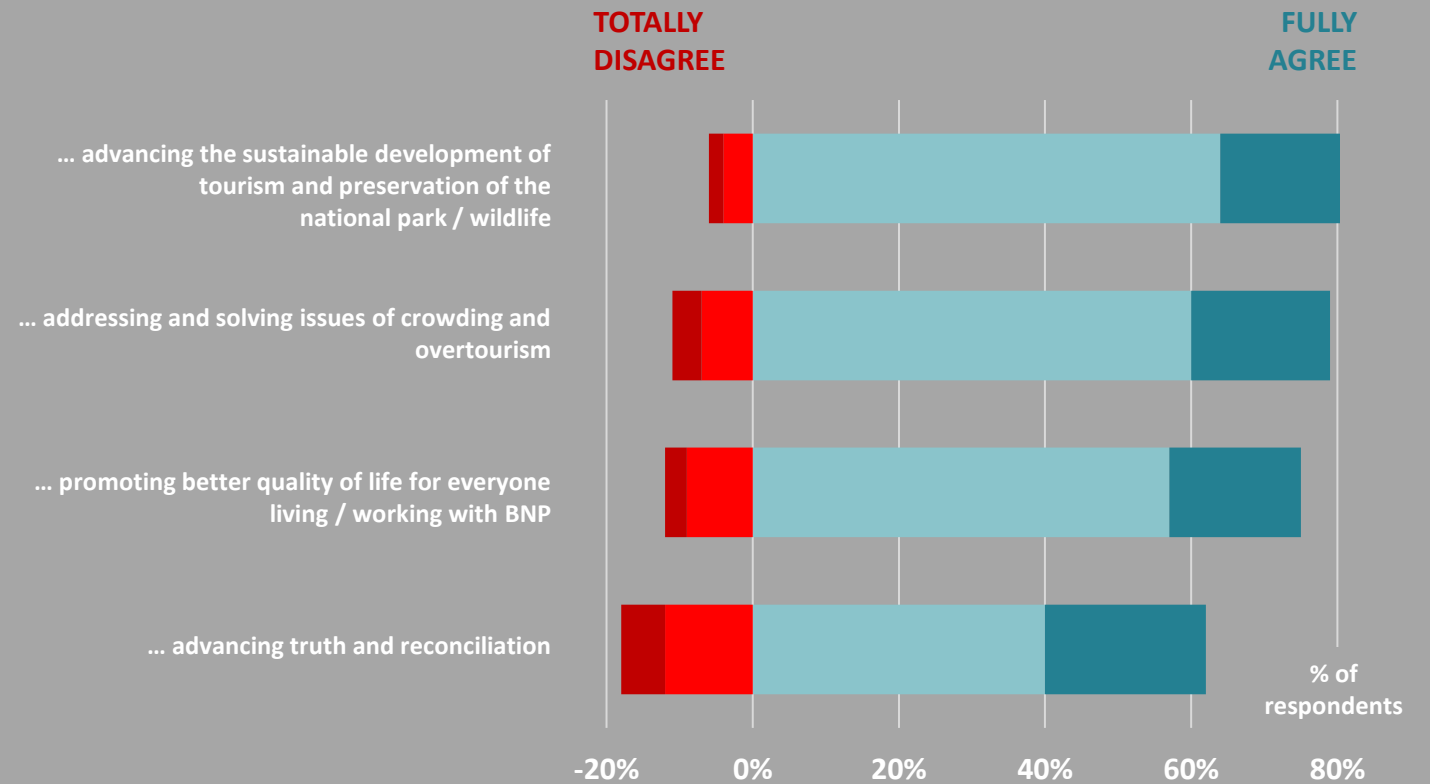
Please indicate how much you agree with the following statements on the role of Banff National Park's tourism industry and sector over the next 10 years...

RESPONSIBLE TOURISM

The respondents in this survey sends a consistent message that the tourism industry itself should lead a move towards sustainable and responsible tourism over the next decade.

More than 8 in 10 would like to advance sustainable development and preservation of nature and wildlife. They also call for solutions to crowding and overtourism.

Better quality of life for everyone living and working in BNP seems a goal in itself.



n = 156

Note: Does not add to 100% as neutral answers are excluded

WHAT BLLT SHOULD PRIORITIZE ...

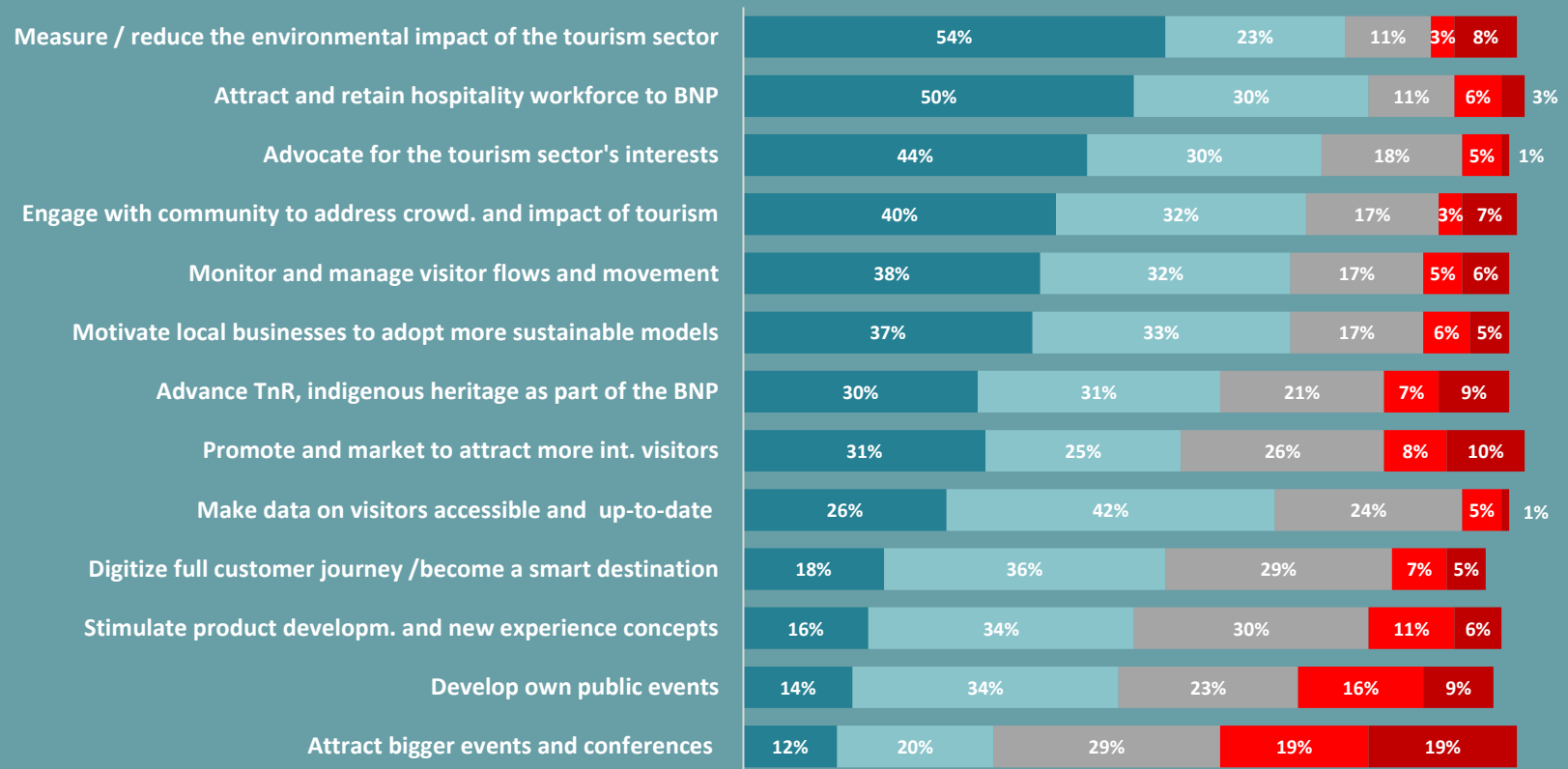
In the years ahead – which of the following efforts should be prioritized by Banff & Lake Louise Tourism? (% of respondents)

ON THE WISH LIST FOR BLLT

80% would like to see BLLT help to retain and attract workers. More than 3 in 4 would like to see BLLT help measure and reduce impact of tourism on environment and climate.

7 in 10 tourism industry partners would like BLLT to prioritize more engagement with the community.

Furthermore, respondents would like to see BLLT “monitoring and managing flows and movement of visitors”. Finally, 7 in 10 would like to see BLLT motivate local businesses to adapt to more sustainable business models, and to help advance truth and reconciliation and Indigenous heritage in BNP (61%).





Visit tourismtogether.com for more findings and results of the Tourism Together process

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