



# **Tourism Fernie MRDT Program 2023 Stakeholder Satisfaction Survey Results & Analysis of 2022 Programs**

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*Prepared by The Web Advisors, on behalf of Tourism Fernie  
June 20, 2023*

# Tourism Fernie MRDT Program

## 2023 Stakeholder Survey (of 2022 Programs)



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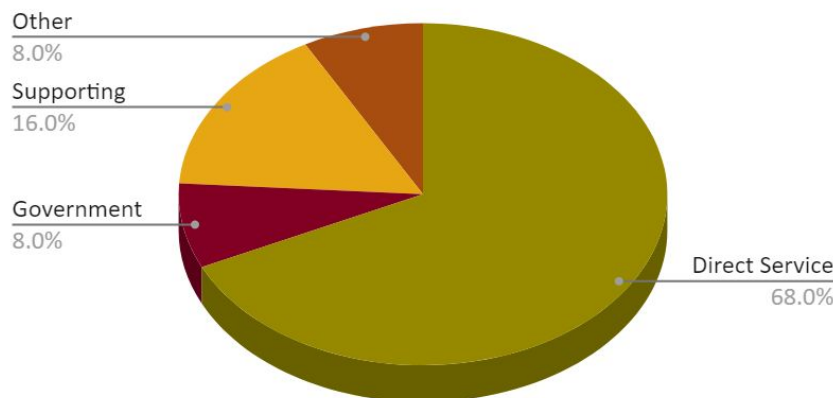
30-31

# Executive Summary:

1. The 2022 Stakeholder Satisfaction Survey was conducted May 12 - May 26, 2023. A total of 54 completions were received out of 151 surveyed, for a 36% response rate (-2.2%) & 91% completion rate, a 4.4% increase over the previous year. The previous year survey had 62 responses, a slightly higher responses rate of 36.5% but a lower overall survey completion rate of 71%.



2. 68% of respondents represented businesses that provide products or services directly to tourists, 8% represented government organizations, 16% represented supporting organizations, associations, businesses or an agency, and 8% were others.



## Executive Summary:



3. **Section 1: Familiarity & Awareness with Tourism Fernie** - Overall reported familiarity increased in 2022 by 26% as compared to 2021. 78% of respondents were either **Very Familiar** or **Familiar** with Tourism Fernie's Marketing and destination management activities, vs 62% reporting the same the previous year.



4. **Section 2: Tourism Fernie Strives to Collaborate & be an Inclusive, Industry-Driven Organization** - 80% of stakeholders rated Tourism Fernie's performance & ways of conducting business as Excellent & Very Good, down by 1.2% compared to previous year's results at 81%.



# Executive Summary (continued)

## 5. Section 3: Additional Insights about Tourism in Fernie

- 64% of respondents said their business/organization out-performed their expectations for 2022 this is up 41.36% compared to previous year, while 26% said their expectations were met vs 53% in 2021, and 10% under-performed this is down from 24.52% in 2021.
- Looking forward for 2023, 62% of business/organizations expect their revenues to grow over 2022, 22% expect the revenue to be same as 2022, 12% expect it to be worse than 2022 & 4% are unsure.



## 6. Section 4: Overall Satisfaction with Tourism Fernie

- All satisfaction reporting either remained flat or saw an increase. Specifically, the reporting of “Consider Tourism Fernie a valuable organization for the community” saw an increase from 86.8% to 98%, an increase of 13% Year over Year.



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# Executive Summary (continued)



## 7. Insights & Observations for Tourism Fernie from Survey Results

- Survey response rate remained consistent year over year at 36%, however a better overall completion rate of 91% was seen this year.
- In advance of future surveys, it would be again encouraged to distribute a couple of preparation communications from an @tourismfernie.com account to pre-engage stakeholders for the survey and advise of the survey forthcoming.
- The lowest awareness on available industry support programs was noted on the *Free members online digital marketing course*. More awareness around these types of activities may be needed in the future.
- There was commentary on the importance of sustainable tourism, responsible travel, managing tourism, focusing on shoulder seasons, supporting local culture & events that should be reviewed.

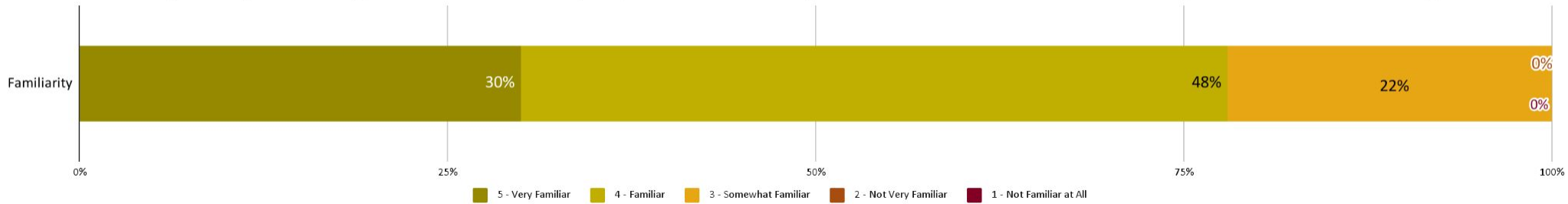


## **Section 1: Familiarity and Awareness of Tourism Fernie**

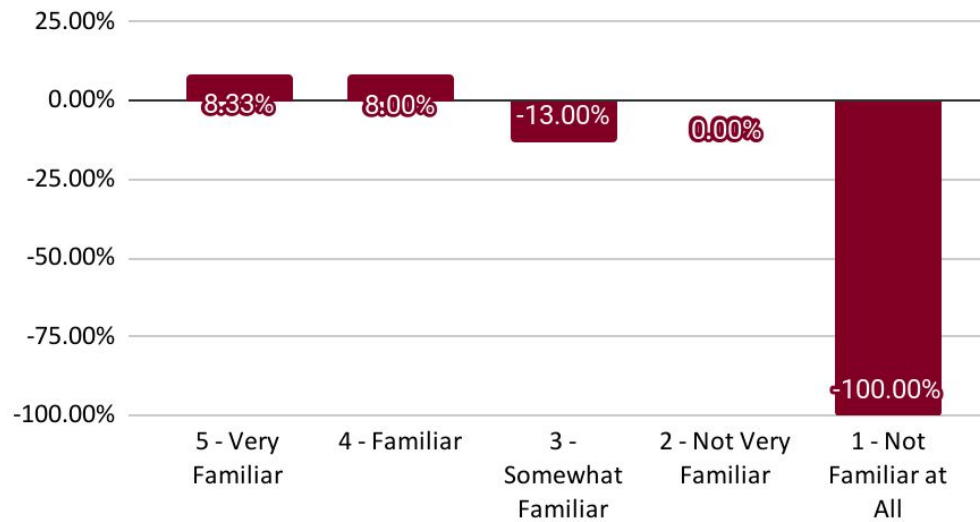
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# Section 1: Familiarity & Awareness

Q1. Overall, and upon viewing the 2022 Annual Report, how familiar are you with Tourism Fernie's marketing and destination management



Familiarity - 2022 vs 2021

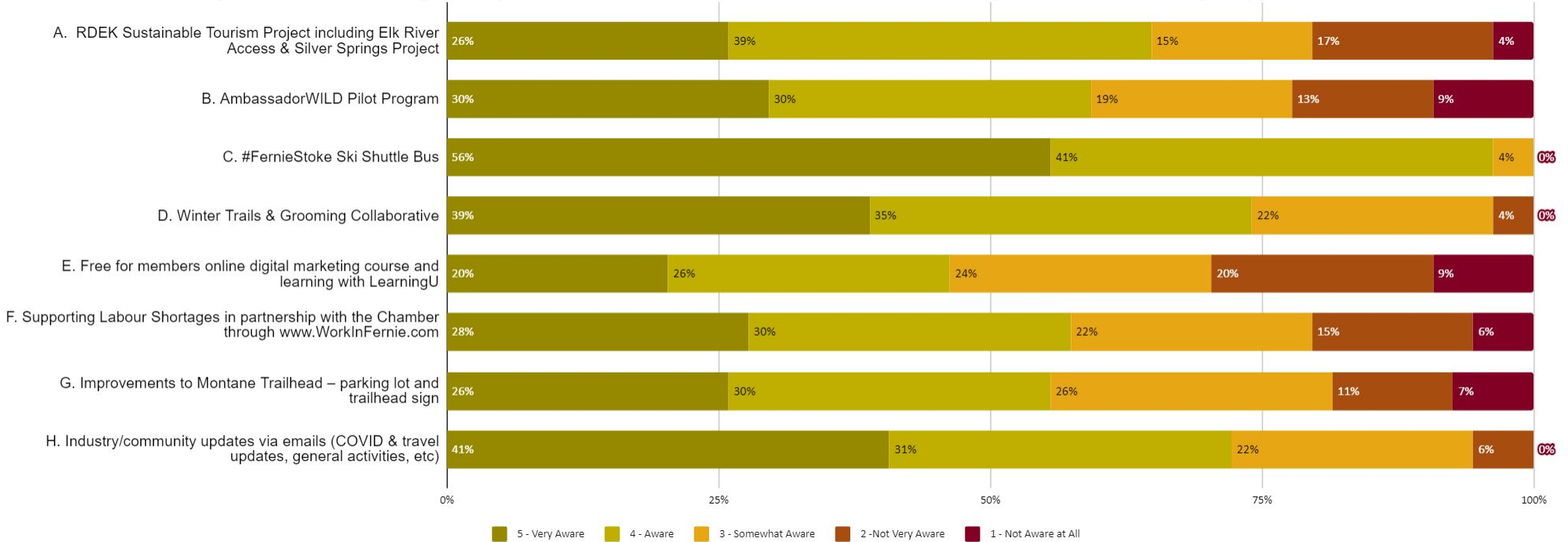




# Section 1: Familiarity & Awareness



## Q2. How aware are you of the following examples of Tourism Fernie 2022 destination management and industry support activities?



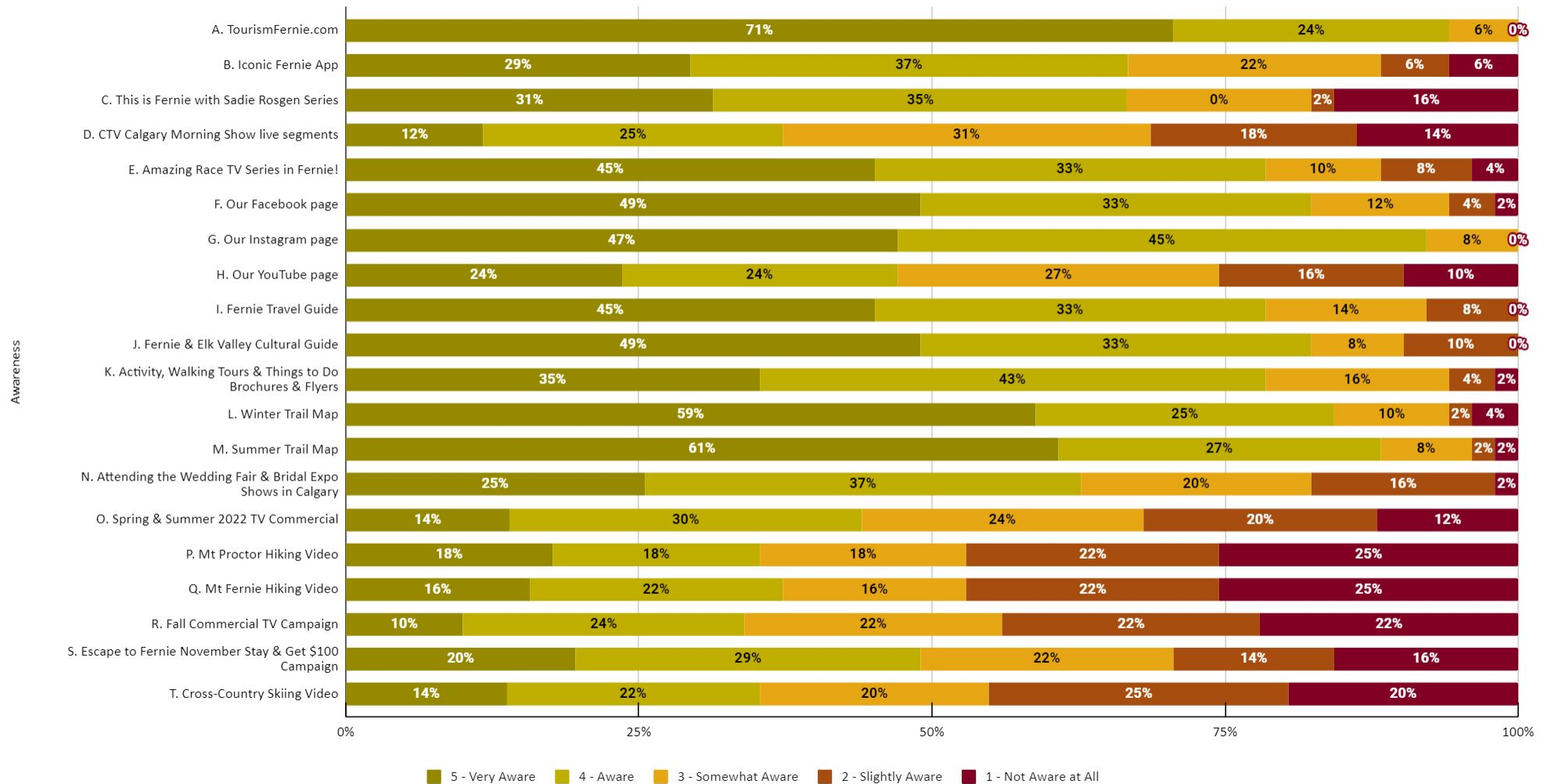
# Section 1: Familiarity & Awareness

How aware are you of the following examples of Tourism Fernie's 2022 destination management and industry support activities?	2022	2021	% Change
A. RDEK Sustainable Tourism Project including Elk River Access & Silver Springs Project (View)	3.67	N/A	-
B. AmbassadorWILD Pilot Program (View)	3.57	N/A	-
C. #FernieStoke Ski Shuttle Bus (View)	4.52	4.34	4.2%
D. Winter Trails & Grooming Collaborative (View)	4.09	N/A	-
E. Free for members online digital marketing course and learning with LearningU (View)	3.28	N/A	-
F. Supporting Labour Shortages in partnership with the Chamber through www.WorkInFernie.com	3.59	3.66	-1.9%
G. Improvements to Montane Trailhead – parking lot and trailhead sign	3.56	N/A	-
H. Industry/community updates via emails (COVID & travel updates, general activities, etc)	4.07	4.27	-4.7%
I. Tourism Week Social event at Bridge Bistro June 2022	3.59	N/A	-
J. Corporate E-Newsletter (View)	3.75	N/A	-

# Section 1: Familiarity & Awareness



Q3. How aware are you of the following examples of Tourism Fernie 2021 marketing activities targeting travelers from outside of Fernie?



**How aware are you of the following examples of Tourism Fernie's 2022 marketing channels and activities targeting visitors from outside of Fernie?**

	<b>2022</b>	<b>2021</b>	<b>% Change</b>
A. TourismFernie.com (view)	4.65	4.7	-1.1%
B. Iconic Fernie App (view)	3.78	N/A	-
C. This is Fernie with Sadie Rosgen Series (view)	3.65	N/A	-
D. CTV Calgary Morning Show live segments (view)	3.04	N/A	-
E. Amazing Race TV Series in Fernie! (view)	4.08	N/A	-
F. Our Facebook page (view)	4.24	3.74	13.4%
G. Our Instagram page (view)	4.39	3.76	16.8%
H. Our YouTube page (view)	3.35	2.97	12.8%
I. Fernie Travel Guide (view)	4.16	4.26	-2.4%
J. Fernie & Elk Valley Cultural Guide (view)	4.22	4.21	0.2%
K. Activity, Walking Tours & Things to Do Brochures & Flyers (view example)	4.06	3.9	4.1%
L. Winter Trail Map (view)	4.33	4.17	3.8%
M. Summer Trail Map (view)	4.43	N/A	-
N. Attending the Wedding Fair & Bridal Expo Shows in Calgary (see pg 58 of 2022 Annual Report)	3.69	N/A	-
O. Spring & Summer 2022 TV Commercial (view)	3.14	N/A	-
P. Mt Proctor Hiking Video (view)	2.8	N/A	-
Q. Mt Fernie Hiking Video (view)	2.8	N/A	-
R. Fall Commercial TV Campaign (view)	2.78	2.25	23.6%
S. Escape to Fernie November Stay & Get \$100 Campaign (view)	3.24	2.41	34.4%
T. Cross-Country Skiing Video (view)	2.84	N/A	-

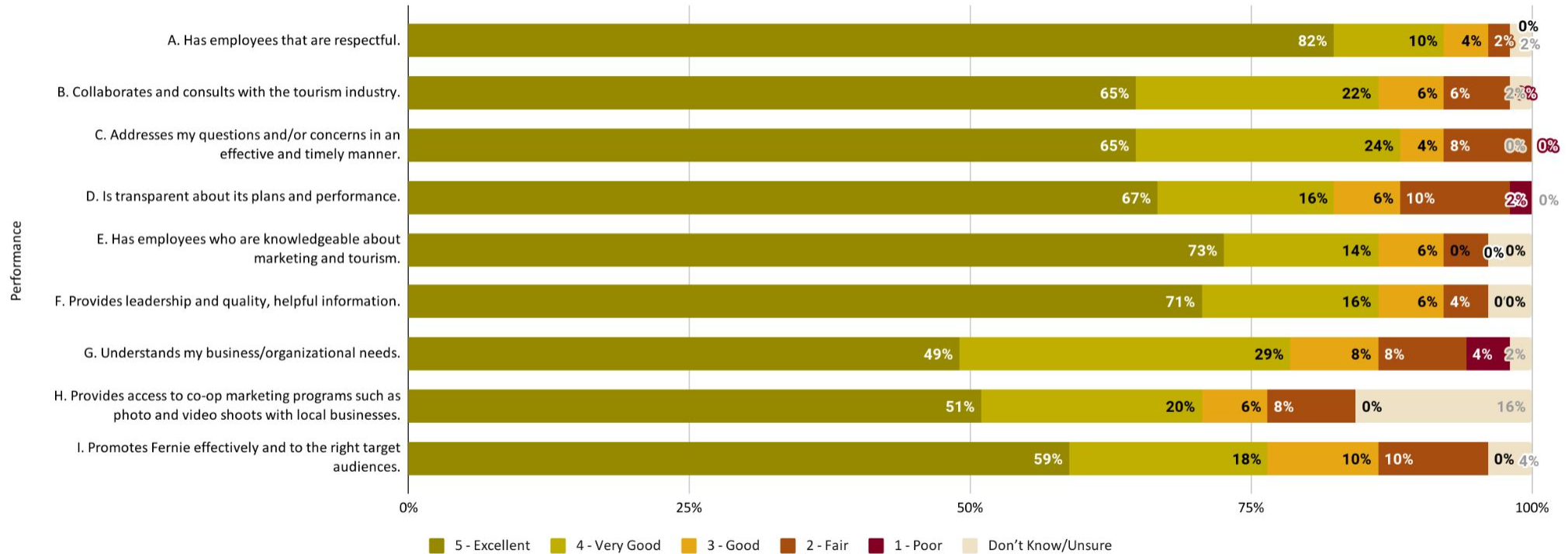


**Section 2: Tourism Fernie strives to collaborate and be an inclusive, industry-driven organization.**

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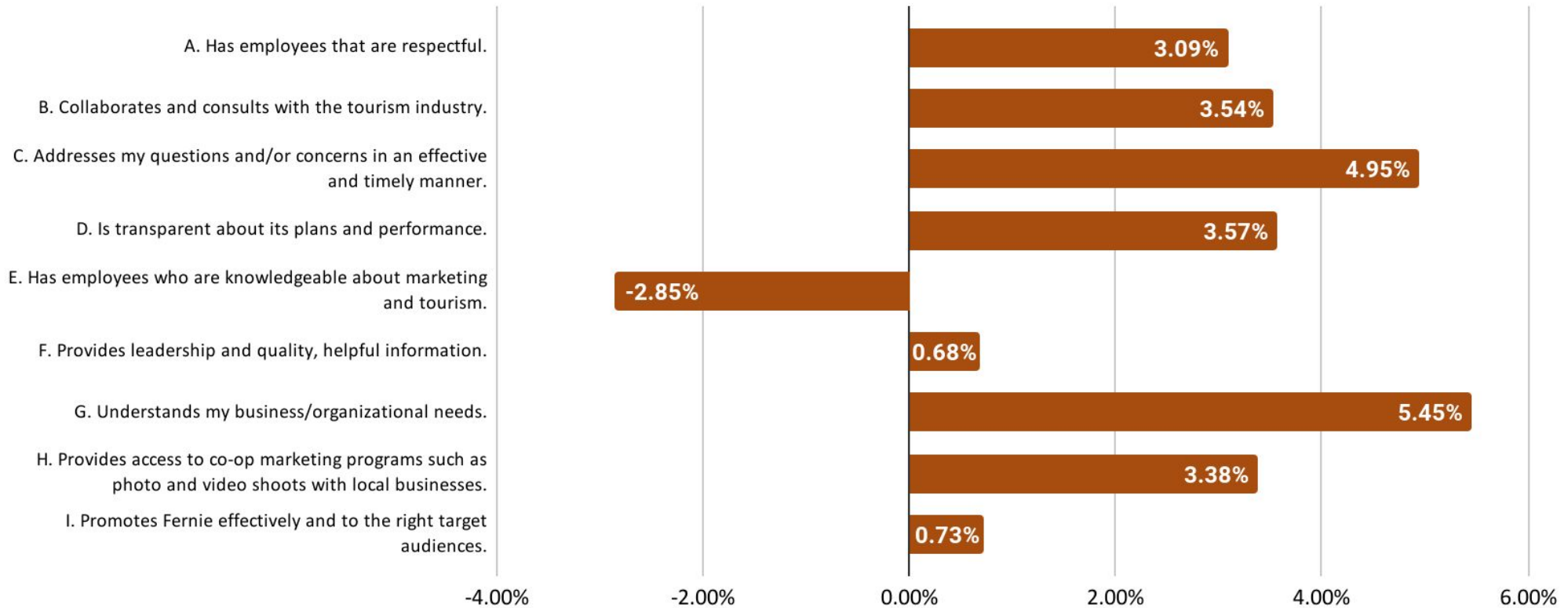
## Section 2: Tourism Fernie strives to collaborate and be an inclusive, industry-driven organization.

Q4. How do you rate Tourism Fernie’s performance on the following ways of conducting business?



## Section 2: Tourism Fernie strives to collaborate and be an inclusive, industry-driven organization.

Tourism Fernie’s performance rating on the following ways of conducting business - 2022 vs 2021



A scenic landscape photograph showing a range of rugged, grey mountains in the background under a bright blue sky with scattered white clouds. In the middle ground, a dense forest of trees displays vibrant autumn foliage in shades of yellow, orange, and green. The foreground is dominated by a thick, white snowdrift.

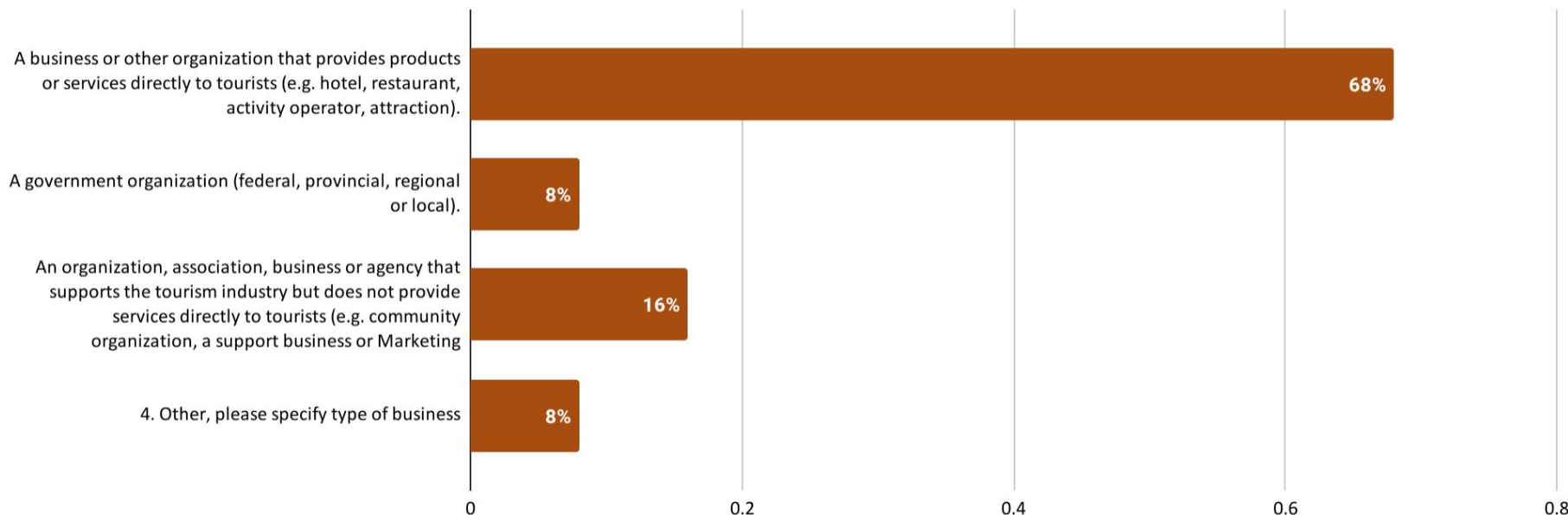
## **Section 3: Additional Insights about Tourism in Fernie**

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# Section 3: Additional Insights about Tourism in Fernie

## Q5. How would you describe your business/organization?



### Other Types of Business:

A business that provides support for individuals and families to live in the Elk Valley and support the businesses that brings tourists to our community. eg: Real Estate and Rental

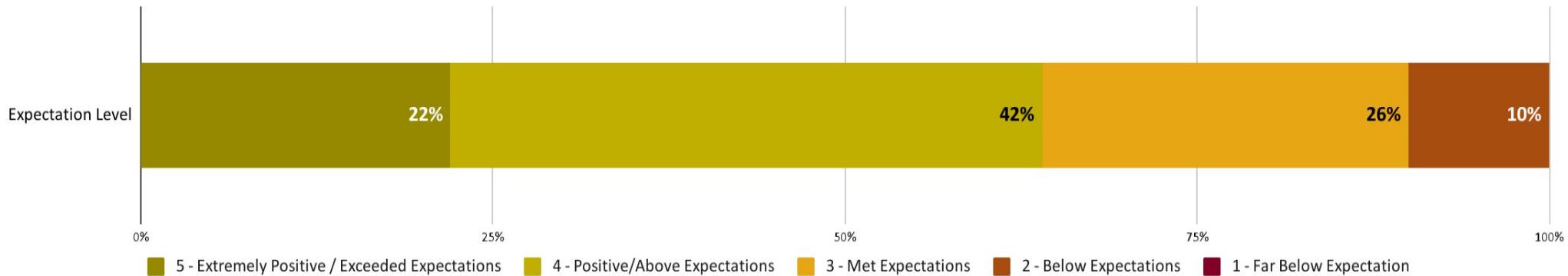
NGO

Services provided to both locals and tourists

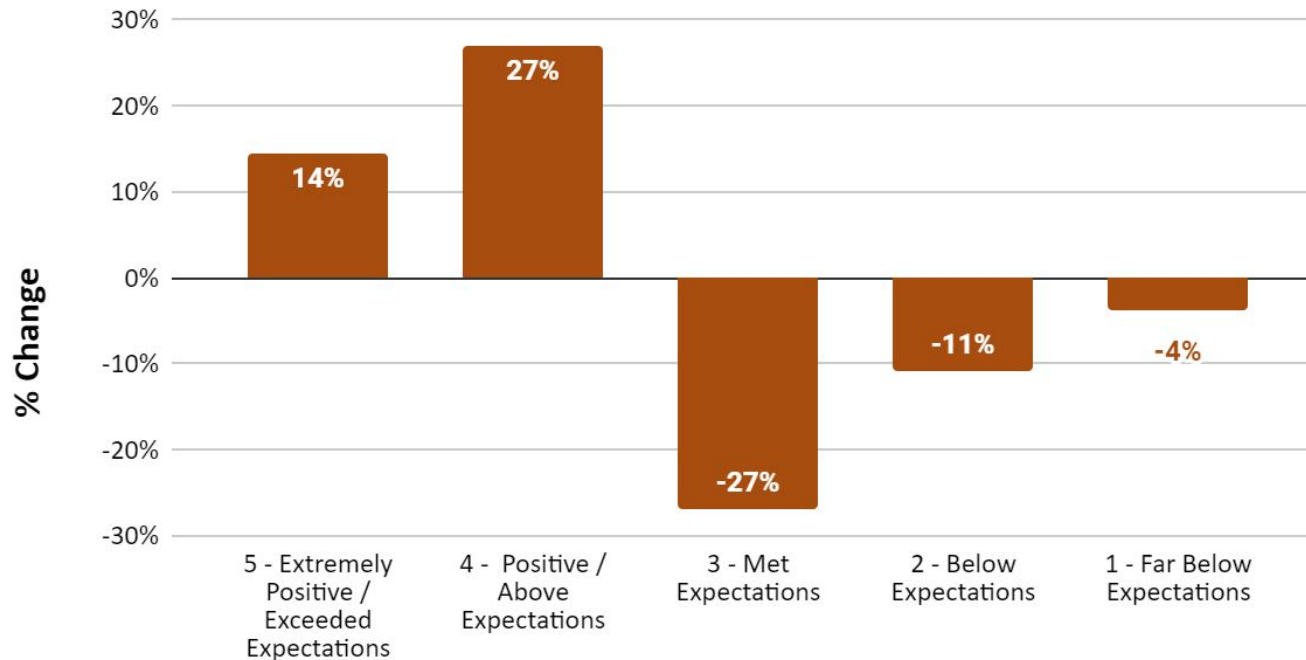
Volunteer for Tourism Fernie

# Section 3: Additional Insights about Tourism in Fernie

Q6. Based on your expectations for 2022, overall, how did the tourism industry perform in 2022 compared to 2021 for your business or organization?

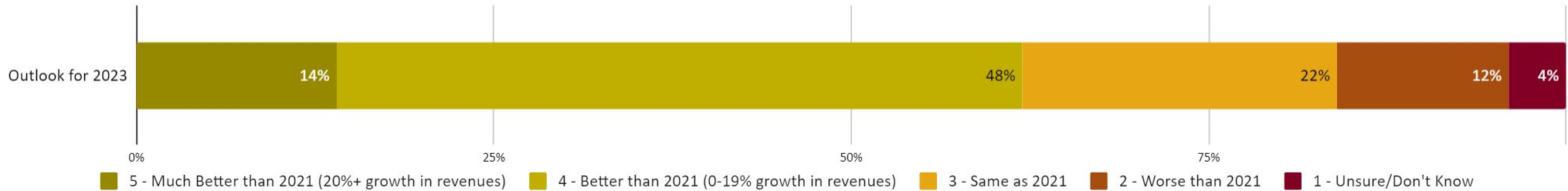


Overall tourism industry performance based on expectations for 2022 vs 2021 for business/organization

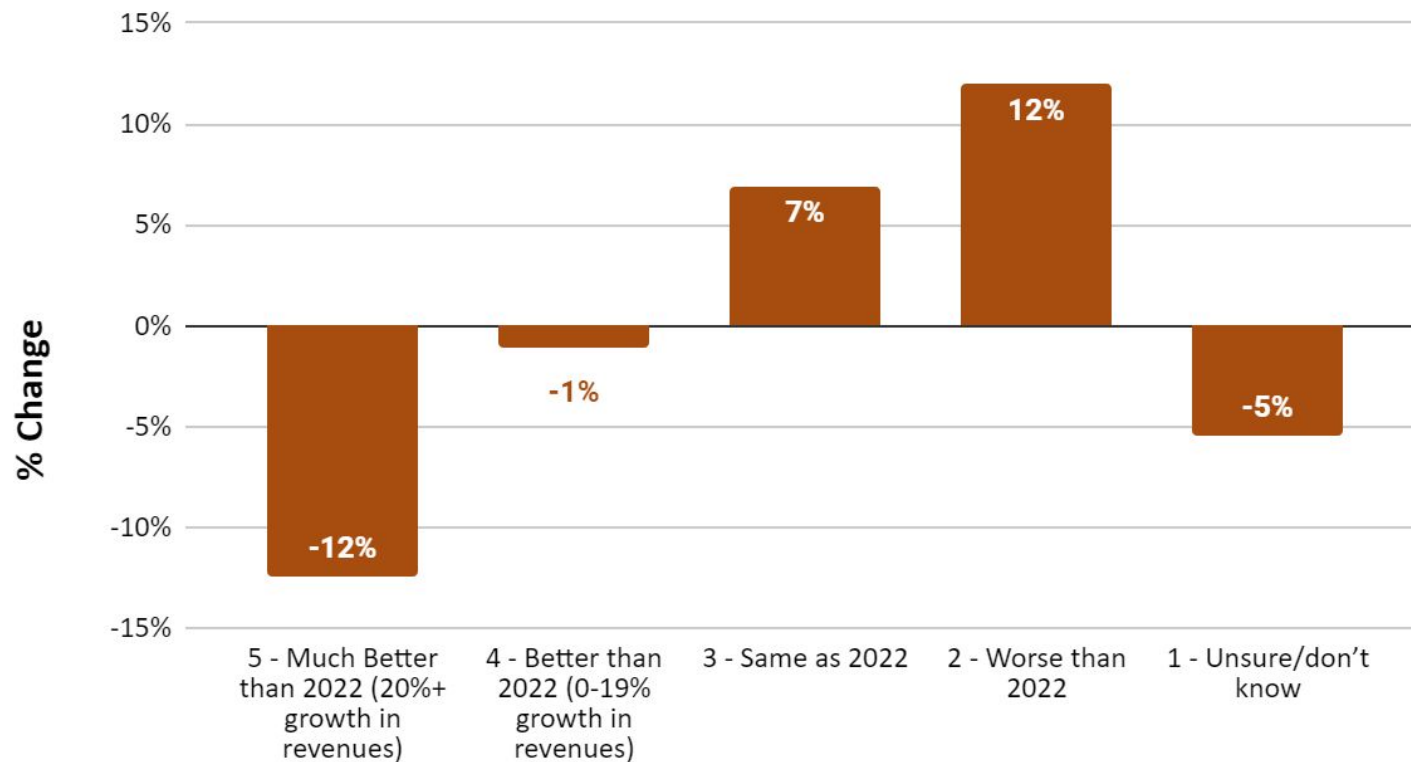


# Section 3: Additional Insights about Tourism in Fernie

Q7. What is your outlook for 2023 for your business or organization compared to 2022?



Outlook for 2023 for your business or organization compared to 2022



## Section 3: Additional Insights about Tourism in Fernie

**Q8. The primary mandate of Tourism Fernie is to market and promote Fernie to visitors. In your opinion, in the future, what types of marketing and promotional activities should Tourism Fernie consider or do more of?**

Food & beverage events - Coffee taste offs, bakery presentations, wine tastings, etc.

Small business recognition and advertising

In my opinion you are the experts and are usually able to quantify the results of your efforts. Keep up the good work!

I like what they are doing now.

A balance between outdoor/sports & arts and culture.

Target Audience from BC lower mainland

Extremely effective marketing, so more of the same.

Informative videos of the area and how to treat the area while you are out exploring.

Promoting authentic, sustainable tourism experiences. Continue to create the vibe of a real mountain ski town, year round.

Skiing in Fernie

Fall campaigns.

Manage tourism impacts.

Great job! I think there should be more marketing for Fernie outside of the Elk Valley. For example promoting Fernie in magazines and online in the West Coast BC as well as in Alberta. Increase social media awareness and engagement through "profile takeovers" or interviews from visitors on a day like "Griz Days" etc.

Community/brand voice clarity. Who/what is Fernie and how is it different from the other area communities to make it stand out.

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## Section 3: Additional Insights about Tourism in Fernie

*Continued from previous page...*

**Q8. The primary mandate of Tourism Fernie is to market and promote Fernie to visitors. In your opinion, in the future, what types of marketing and promotional activities should Tourism Fernie consider or do more of?**

Destination events

Social media videos/influencer engagement

Helpful resources for a great experience: planning ahead guides, FAQ, setting expectations of the destination and capacity.

Sustainable tourism, eco friendly options, educational and cultural

Promoting off-season. Summer and Winter are very busy, and we are seeing the impacts.

More collaboration

Better understanding of lgbtq tourism and reach out to that market segment.

Keep doing what you're doing!

Eastern Canada , the US and Australia

More inclusive. More minority and LGBTQ content not just the same influencers

Exploring golf in the Kootenays, but stay in Fernie

Their work on destination marketing I feel is very effective. I would like to see a little more opportunity to interact with luxury-specific stakeholders.

Foodie industry.

More DEI marketing. Missing out on the marginalized community tourists. But do not do this is a token-like way.

Food and culture

They are doing great

## Section 3: Additional Insights about Tourism in Fernie

**Q9. Destination marketing organizations take on a wide range of activities outside of marketing and promotions to help grow and manage tourism. In your opinion, in the future, what types of tourism and destination management activities should Tourism Fernie consider or do more of?**

Lobby for cleaner and tidier highways stops in Elko, the water hole and Olsen Crossing.  
request to have no dust aggregate used on the roads, so there is less dust on streets, cars and buildings

Tours of Fernie and surrounding areas

Responsible Tourism Management

Possibly expand on your learningU program?

They are doing great

Arts and Culture, or activities people might not have come for their primary focus but would enhance their experience

Doing Great

No opinion at this time

Informative videos of the area and how to treat the area while you are out exploring.

River amenities. Trail staging area amenities. Implementing the Fernie Sustainable Tourism Strategy

Design and implement initiatives that promote workforce creation to run our amenities.

Backcountry etiquette and education.

Visual marketing through video that can be viewed on all social media platforms. Get involved with Banff Film Festival--as that seems to be a target audience.

Fernie needs a new big summer draw like a coaster or gondola or epic trail

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## Section 3: Additional Insights about Tourism in Fernie

*Continued from previous page...*

**Q9. Destination marketing organizations take on a wide range of activities outside of marketing and promotions to help grow and manage tourism. In your opinion, in the future, what types of tourism and destination management activities should Tourism Fernie consider or do more of?**

Support for the community and businesses in managing tourists. Help create a good tourist experience and protect it for the future. This includes supporting the workers needed to meet demand with affordable living: housing, living wages and childcare.

Educational, cultural and arts. We have an opportunity to really show case the Art scene and do more to honor our indigenous history. Partner with Art station and Ktunaxa to create exhibits and events

I appreciate the tourism management work TF is doing, and I think it's important to continue to work to mitigate issues to ensure our backcountry can continue to be enjoyed and taken care of. Additionally, working with businesses and organizations to support / facilitate housing needs.

Visitor information

How to create activities for a bad snow winter, particularly if climate change means more of those in the future

Social media seems to be hugely influential in our business.

May and October long weekend Festivals - not sure what but would signal the opening and closing of the summer season...

Take over Griz days, take over Chataqua

Environmentally responsible ecotourism.

The continuation of media tours is ideal. Also the opportunity to be part of a database for future film opportunities.

International advertising through tour companies.

Greater support of non-sporting activities, and not just a retail focus. Highlight community builders, artists, etc...the people that provide the culture and face of Fernie and area.



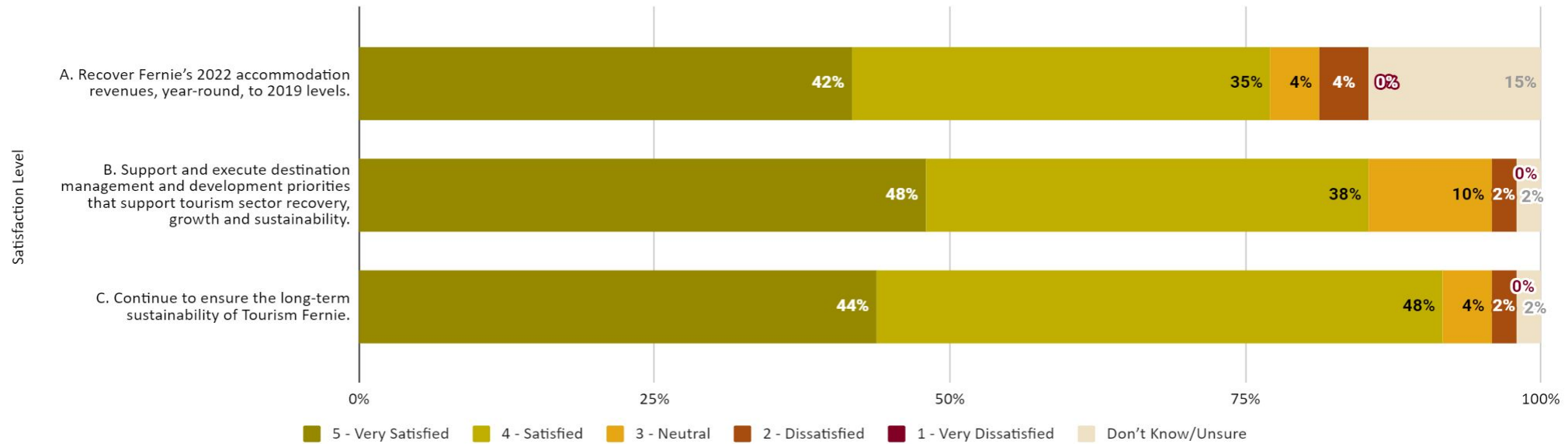
## **Section 4: Overall Satisfaction with Tourism Fernie**

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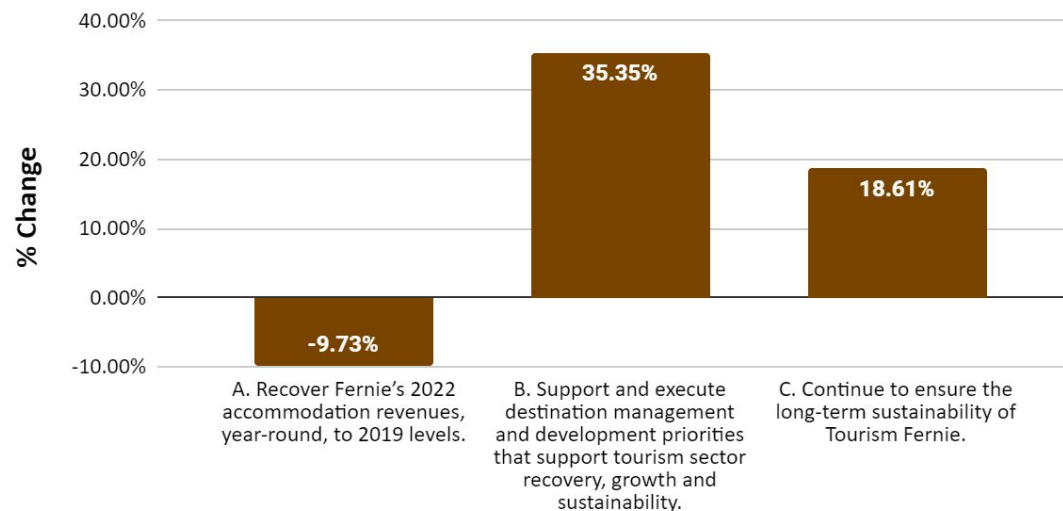


# Section 4: Overall Satisfaction with Tourism Fernie

Q10. Based on your knowledge, on a scale of 1-5, where 1- Very Dissatisfied and 5- Very Satisfied, how satisfied are you with Tourism Fernie in achieving the below three goals from its strategic plan? View the 2022 Annual Report

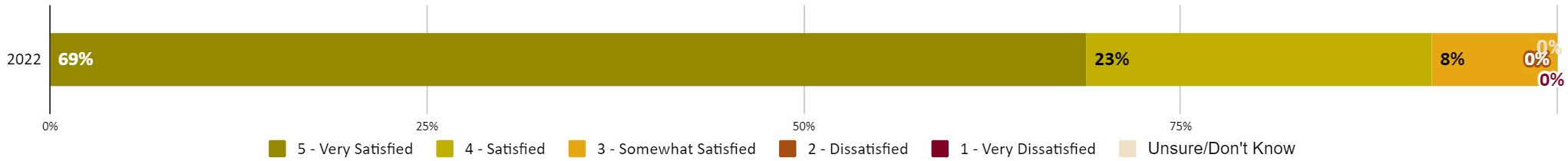


Satisfied with Tourism Fernie in achieving the below three goals from its strategic plan - 2022 vs 2021



# Section 4: Overall Satisfaction with Tourism Fernie

Q11. Taking everything into account, how satisfied are you with the overall performance of Tourism Fernie?



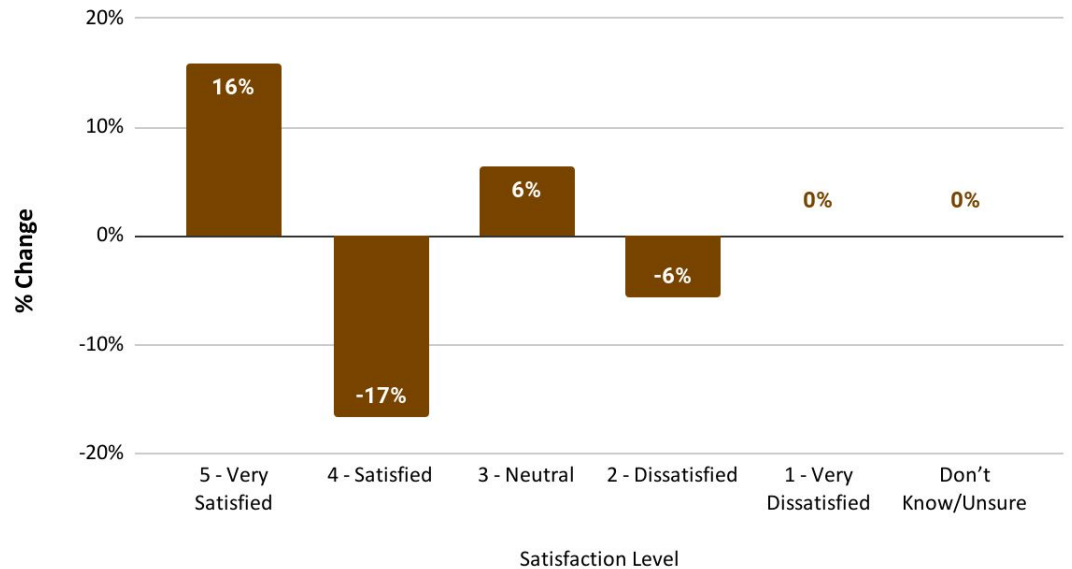
If 4 or lower, what could Tourism Fernie do to improve your satisfaction? Fill in your response.

Increase marketing efforts around the province and country to bring more awareness to the Alpine Resort, mountain biking and more.

Respond more to community needs to support Tourism long term with capacity management.

Keep working on attaining those goals as 2022 was nowhere near 2019 in terms of revenue etc.

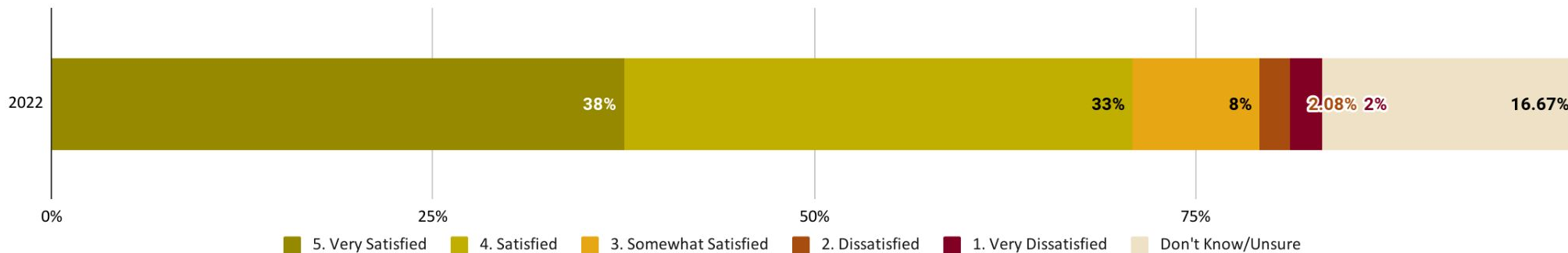
Overall satisfaction with Tourism Fernie 2022 vs 2021



Average Score for 2022 was 4.60.  
 Average Score from 2021 was 4.40  
**Net increase of 4.7%**

# Section 4: Overall Satisfaction with Tourism Fernie

Q12. Overall, how would you rate your satisfaction with Tourism Fernie’s use of MRDT / Hotel Tax funds?



Q12 A. If 4 or lower, what could Tourism Fernie do to improve your satisfaction for the use of MRDT funds? Fill in your response.

Use the funds to support the organizations that bring in the tourists, like Fernie Trails Alliance.

I'd like to learn more how MRDT can be used outside of marketing. more projects and programs.

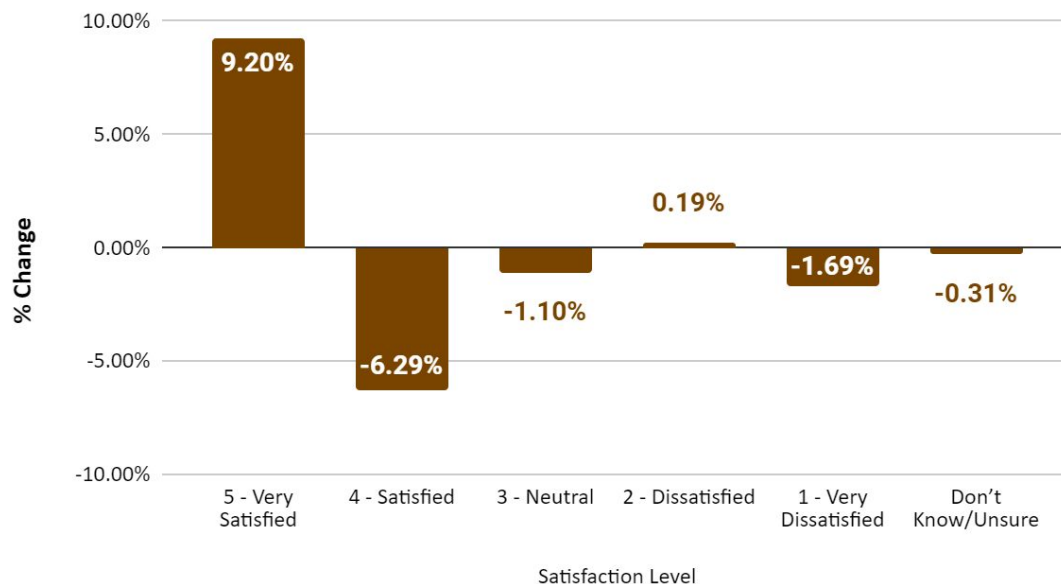
Too much funding is being spent on trail maintenance etc instead of long term permanent infrastructure.

Used to further support the tourism in Fernie not market it further. When marketing do it to support the great experience not just bring people here.

I agree with the move away from marketing and towards sustainability and management in the 2023 budget.

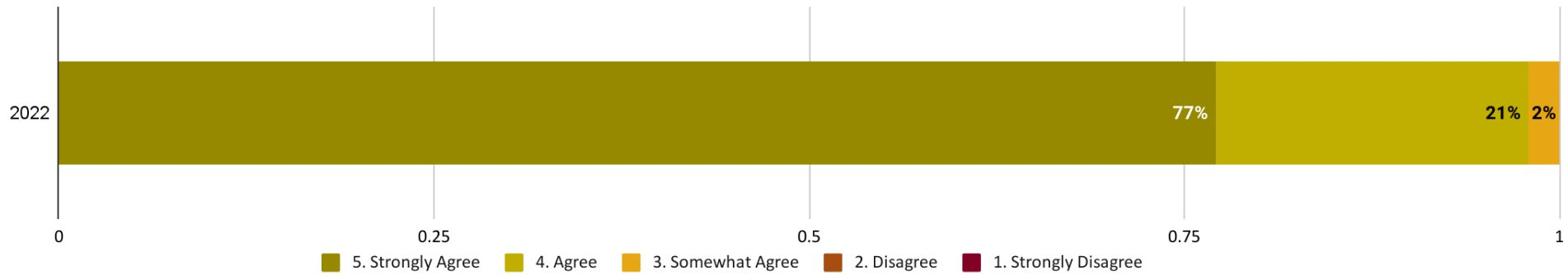
Less focus on marketing Fernie but greater focus on how to access Fernie. We don't necessarily need to market Fernie. People are aware of it. We need to market why we are great and why you should be a repeat visitor.

Satisfaction with Tourism Fernie’s use of MRDT / Hotel Tax funds 2022 vs 2021



# Section 4: Overall Satisfaction with Tourism Fernie

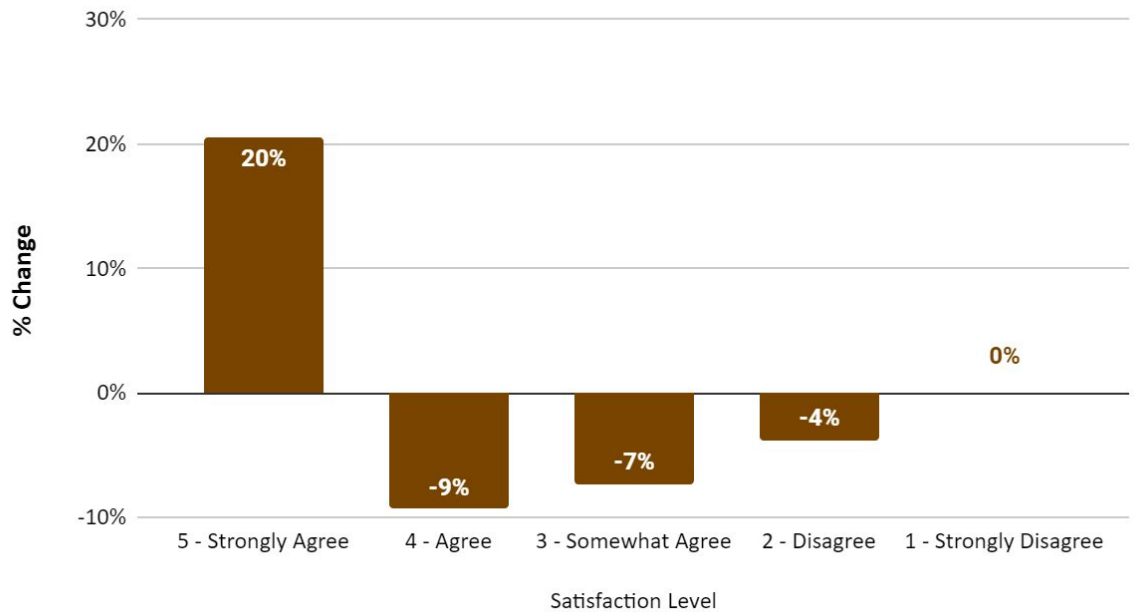
Q13. How much do you agree with the following statement: Tourism Fernie is a valuable organization for the community?



Q13. A. If 4 or lower, what could Tourism Fernie do to improve your perspective? Fill in your response.

I agree, but feel it will continue to shift away from marketing and towards conservation.

Tourism Fernie is a valuable organization for the community - 2022 Vs 2021



## Section 4: Overall Satisfaction with Tourism Fernie

Q14. Do you have any final comments you would like to share about Tourism Fernie or about tourism in our community/area?

Thanks for all you do.

I think that Tourism Fernie with Jikke and her team are doing a fabulous job!

Thank you!

Fantastic group of people to work with

Keep up the great work

Keep up the great work Tourism Fernie!

Appreciate the courage and tenacity of Tourism Fernie to tackle destination management in concert with marketing.

Increase the pay rate for its employees to secure long term retention

A very collaborative, thoughtful and strategic organization.

Great job overall however, increased marketing efforts around advertising Fernie more around other cities to increase foot traffic. Fernie is more than a drive-through town!

Good job over the past few years to all the staff you guys did a wonderful job. Thank you.

Great work, and thank you for the survey.

Excellent organization and wonderfully supportive and caring staff.

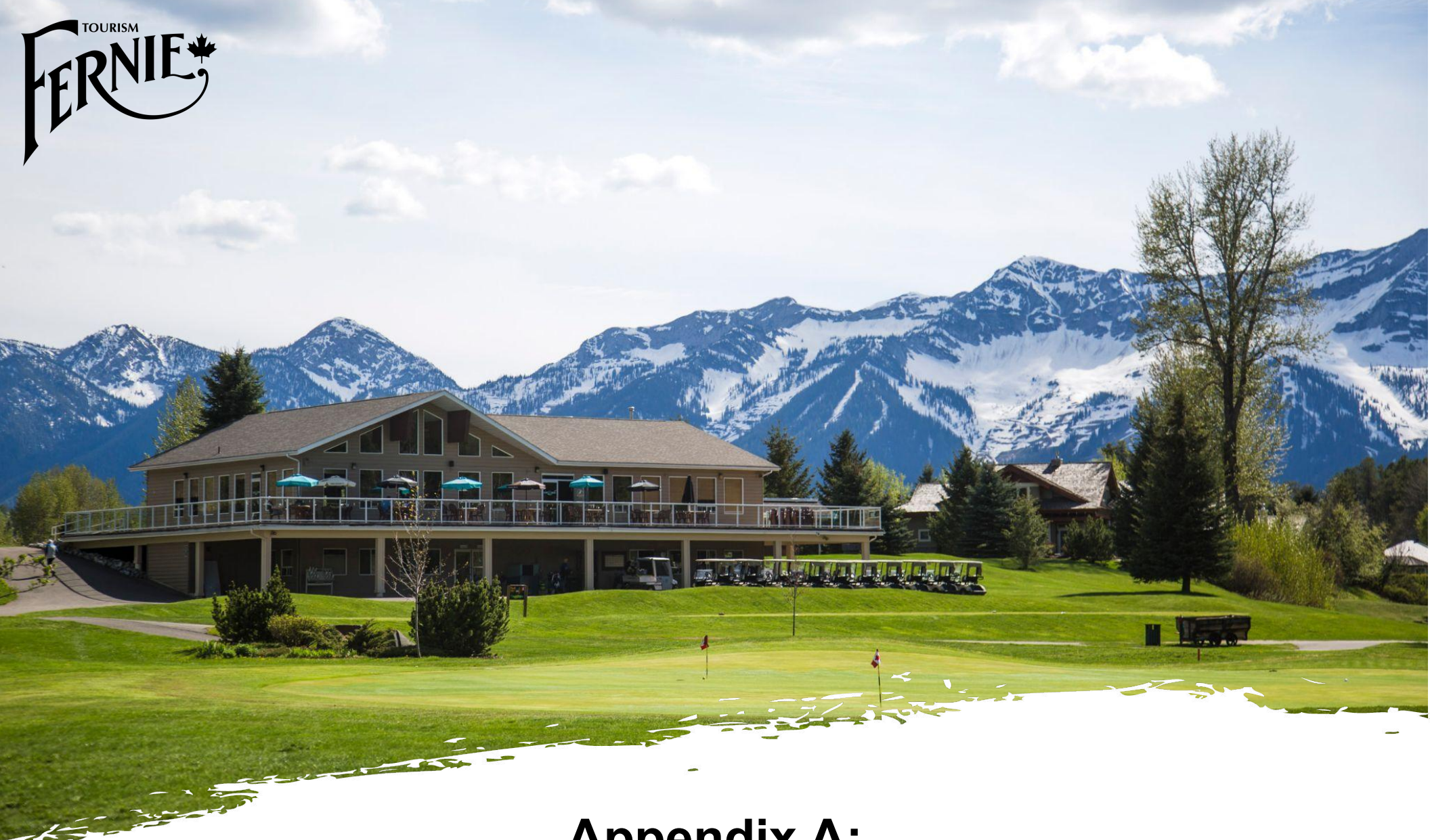
Thanks for all your hard work. It's been a tough couple of years and we're not back where we should be yet. Huge problems still finding staff to run our business at 2019 levels.

I feel like a lot of effort was placed on the shuttle bus but I disagree that a lot of visitors use it. No one can come to town without a vehicle and the shuttle service availability is limited so I'm not sure how much effort should be placed there. How many of you take the shuttle regularly? A bike rental service might make more sense in the summer months.

In my opinion, optically it seemed like TF was supporting the pipeline project here and the strain its putting on everything. I was confused by this, its hurt tourism, I expected more of a fight to push them to stay somewhere else. just my thoughts. maybe TF did, but optically it seemed like they were happy and trying to convince me that I should be happy. the pipeline project is hurting my business.

Great team, very engaged and supportive.

It may be time to examine tourism's impacts on the community and environment. Ever-increasing tourism numbers are not sustainable without the infrastructure in place to handle it.



# **Appendix A: Background, Research Objectives & Methodology**

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# Appendix A

## Background, Research Objectives & Methodology

### Background

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

This survey is required by the province and must be submitted annually to Destination BC.

This is the summary of the *"2023 Tourism Fernie Stakeholder Survey of 2022 Programs"*

### Research Objectives

1. Assess the level of awareness of tourism marketing activities in Fernie
2. Assess the level of satisfaction with the use of MRDT funds

### Methodology:

### Population and Survey Administration

*Tourism Fernie's Annual Stakeholder Satisfaction Survey* was sent to 151 stakeholders in Tourism Fernie's Industry database.

The online survey was conducted May 12 - May 26, 2023. The first request was distributed on May 12th, followed by three more distributions sent on May 15th, May 23rd & a 24-hour reminder distribution was sent on May 25th. The survey closed on May 26th. A total of 54 completions were received, for a 35.7% response rate (-2.2%) & 90.7% completion rate, a 4.4% increase over the previous year.

### 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 compiled and reported within.

Chris Elder  
Managing Director  
[chris@thewebadvisors.ca](mailto:chris@thewebadvisors.ca)  
250-889-0973