

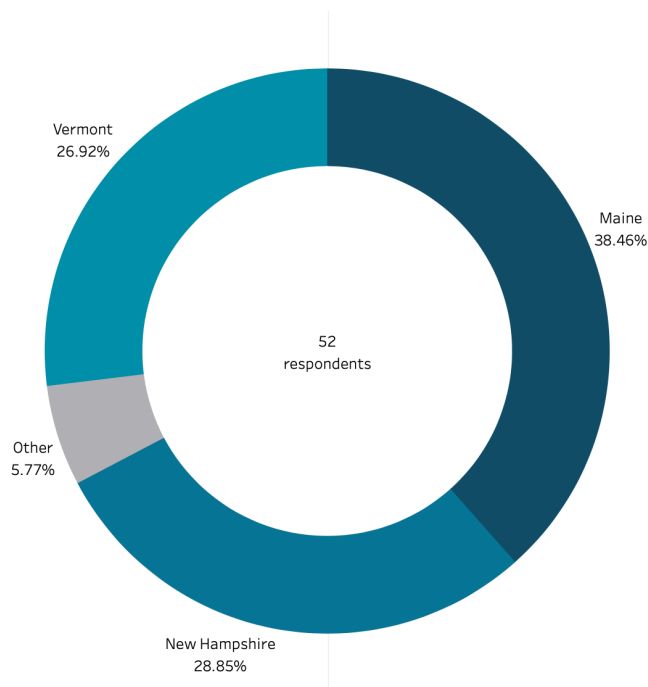
## Northern Forest Destination Summit - Preparation Survey

Prior and during the Northern Forest Center's Destination Summit, participants were asked to complete a survey, aimed at helping frame the content and discussion for the summit. These surveys are also aimed to help inform subsequent actions and investments.

In total there were 24 questions, that explored themes such as:

- Nature of tourism impacts and benefits
- Visitor preparedness
- Visitation management systems
- Current funding and support
- Future trajectory
- Sustaining a sustainable tourism approach, including strategic actions

### Participant surveys – responses by State



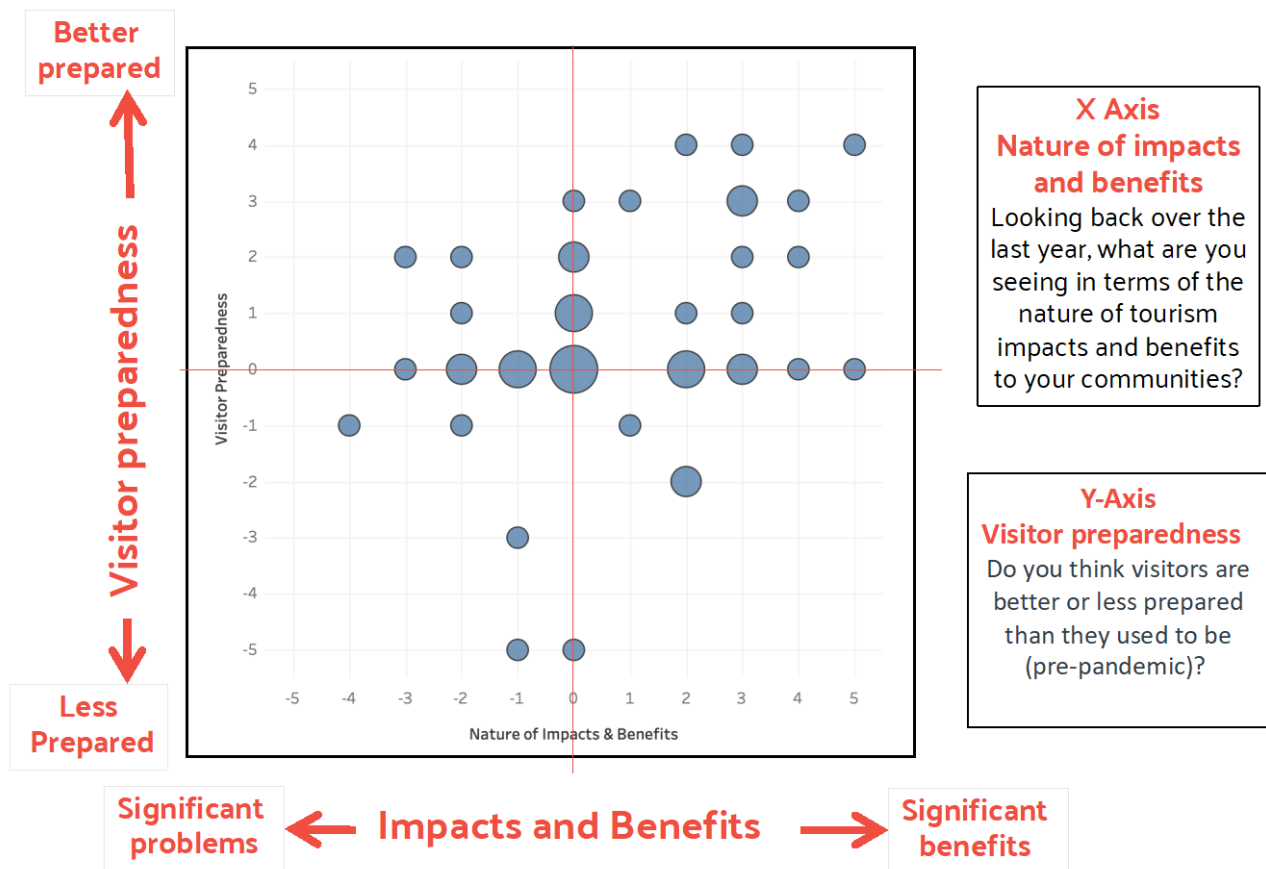
### Data Insights:

- In total, 52 responses were collected, which reflects almost all the community representatives who attended the summit.
- The responses were an excellent cross section of people from across the region, and different roles within the tourism sector.
- Almost all had participated in one of the destination development programs hosted by the Northern Forest Center.

## CHART 1 – Nature of Impact x Visitor preparedness

The visitation economy is growing across the Northern Forest region. The survey explored insights on what people are seeing happening on the ground with visitation. There is also a growing focus on better informing visitors about what they can expect as they travel and visit rural communities in the Northern Forest. This has been reflected in investments in visitor portals, pledges, and wayfinding. The responses to two relevant questions were plotted on the following pivot chart.

### Nature of impact x Visitor Preparedness



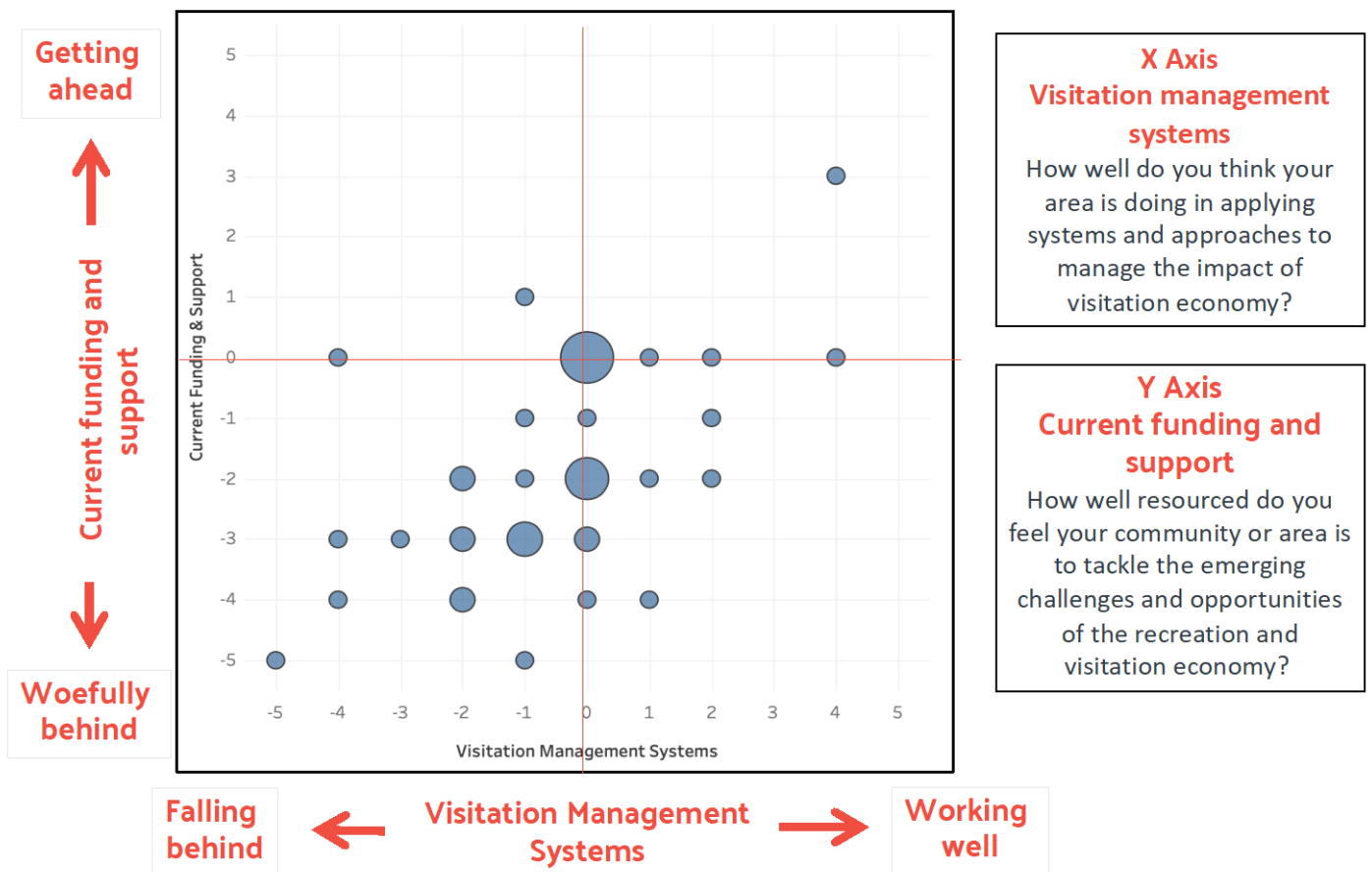
#### Data Insights:

- Most responses show that the perceived nature of impact and benefits have been mostly positive, however there are several responses that reflect negative impacts. This is encouraging, as there have previously been expressed deep concerns about the severity of negative impacts, especially early in 2020 and 2021.
- The perception of visitor preparedness is encouraging, with most people reporting that visitors are better prepared than they were pre-pandemic. This could be a reflection that the investment in visitor education is starting to pay off with positive results.

## CHART 2 – Visitor Management x Current Funding and Support

Managing the visitation economy is important to ensure it is sustainable and delivers long term benefits for local communities and residents. This can include dispersing impact, avoiding land use conflicts, and building business capacity. We also know that building destination impact management systems requires investment, time, and resources. These topics were explored in the survey.

### Visitor Management x Current Funding and Support



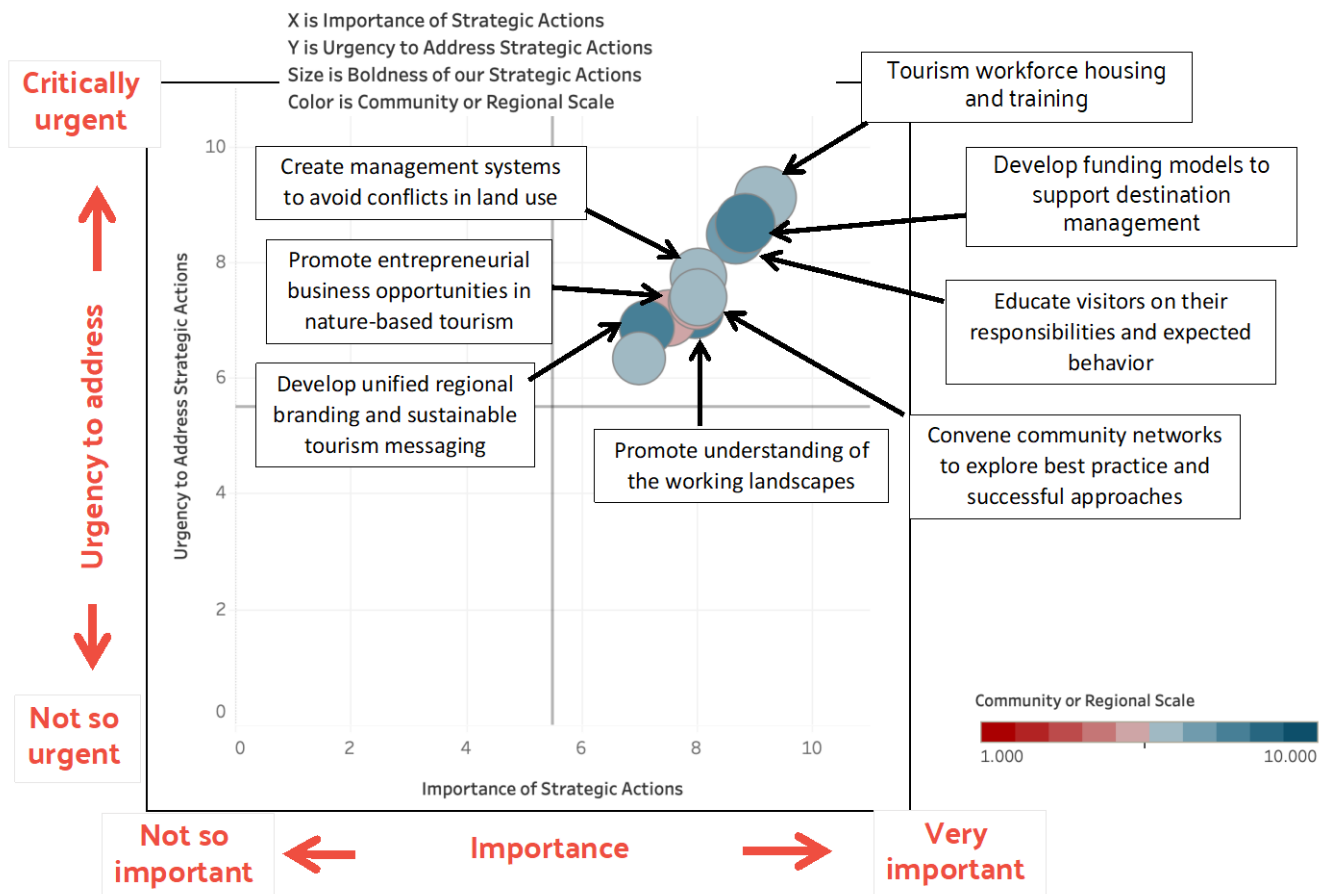
#### Data Insights:

- This pivot chart shows the challenge people find funding and support activities associated with destination management. In most cases people report they feel they are deficient of the necessary resources and support.
- Similarly, there was an overall perception that Visitation Management Systems were inadequate to the manage visitation at current levels.

### CHART 3 – Strategic Actions and Solutions

The survey also explored insights into the priority of ten key identified strategic actions and solutions. The list of actions was as follows:

1. Develop funding models to support destination management
2. Educate visitors on their responsibilities and expected behavior
3. Develop unified regional or subregional branding and sustainable tourism messaging
4. Promote understanding of the working landscapes of the northern forest region
5. Convene community networks to explore best practice and successful approaches
6. Create management systems to avoid conflicts in land use
7. Invest in more product such as trails, trailheads, and signage
8. Invest in tourism industry related workforce housing and training
9. Promote entrepreneurial business opportunities in nature-based tourism
10. Create and curate packages that link communities, and sectors such as recreation, foods, and arts



#### Data Insights:

- All the strategic actions were seen as important and carried a need for urgency
- Overall, there was a desire to bold in thinking about solutions and actions
- Many of the actions were seen as needing a regional solution.