Summary Report

2015 STAKEHOLDER SATISFACTION STUDY

Prepared for
Destination BC

Prepared by
R.A. Malatest & Associates Ltd.

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Contact Information:
Rob Malatest, President
R. A. Malatest & Associates Ltd.
Phone: (250) 384-2770, ext. 4052
Fax: (250) 384-2774
Email: r.malatest@malatest.com
Web: www.malatest.com

300, 10621 – 100 Avenue
Edmonton, AB T5J 0B3

1201, 415 Yonge St
Toronto, ON M5B 2E7

858 Pandora Avenue
Victoria, BC V8W 1P4

500, 294 Albert Street
Ottawa, ON K1P 6E6

206, 255 Lacewood Drive
Halifax, NS B3M 4G2

TABLE OF CONTENTS

SECTION 1: INTRODUCTION

1.1 Background

Destination British Columbia (Destination BC) is an industry-led crown corporation that has been mandated to fulfill several key marketing and leadership responsibilities critical to the long-term, sustainable growth of the provincial tourism industry. Destination BC was established as a Crown corporation on November 2, 2012 under the British Columbia Business Corporations Act, and was continued as a statutory crown corporation pursuant to the Destination BC Corp. Act of 2013. On April 1, 2013 staff were transferred from the Ministry of Jobs, Tourism and Skills Training and Destination BC began full operation.

The tourism industry in BC that is served by Destination BC is comprised of many different stakeholders including tourism operators, suppliers, media relations representatives, communities, associations, delivery organizations, and regional and community destination marketing organizations.

In the spring of 2014, Destination BC launched the *2014 Stakeholder Satisfaction Study,* to obtain a baseline measurement of stakeholder views, allowing Destination BC to better assess the fulfillment of its mandate and track changes in performance over time. This information gathered by the survey is intended to enhance Destination BC's ability to address current and future requirements of the businesses and organizations in the tourism industry. The 2015 *Stakeholder Satisfaction Study* is the second annual implementation of the survey.

1.2 Research Objectives

The intent of the *2015 Stakeholder Satisfaction Study* is to assess stakeholder satisfaction with services provided by Destination BC and to identify how Destination BC can better support BC's tourism industry. Specific research objectives included the following:

1. Assess Destination BC's performance on delivering its corporate mandate;
2. Evaluate stakeholders' familiarity with and satisfaction with services/programs provided by Destination BC;
3. Assess Destination BC's communications, level of service, and delivery of services/programs;
4. Review stakeholders' perceptions and attitudes towards Destination BC;
5. Evaluate Destination BC travel trade team's performance relative to other competitors;
6. Assess the BC tourism industry perceived level of collaboration and alignment; and
7. Assess stakeholders' current and future needs of Destination BC.

SECTION 2: METHODOLOGY

2.1 Methodology

2.1.1 Scope of Work

The Destination BC *2015 Stakeholder Satisfaction Study* was conducted by R.A. Malatest and Associates (the Consultant) in consultation with Destination BC (the Client). The scope of work included:

- Consultation on a comprehensive survey instrument
- Updating Computer Assisted Interview/Telephone Interview (CAWI/CATI) programming of survey. Including new sections dedicated to Travel Trade relationships and the level of collaboration and alignment.
- Management of email invitations and online survey administration
- Surveyor training and telephone follow-up of respondents
- Data cleaning and processing (including coding open-ended respondent comments)
- Preparation of a preliminary top-line report
- Preparation of a draft final report
- Delivery of a final report

2.1.2 Stakeholder Population

The stakeholder population frame for the *2015 Stakeholder Satisfaction Study* included stakeholder organizations from the following strata:

- Destination Marketing Organizations (DMOs), which includes regional, city and community DMOs and Destination Canada's Vancouver head office;
- Primary sector organizations;
- Travel Trade & Destination Canada, which includes airlines, North American and overseas tour operators, and receptive tour operators, and Destination Canada's overseas offices;
- Delivery organizations, which includes Visitor Centres, WorldHost® Trainers and Hospitality Industry Education (go2HR board members);
- Travel media; and
- Tourism businesses that were enrolled in the 2014 HelloBC® Listings Program.

The list of stakeholders to include in survey administration was developed by Destination BC. Each of the Destination BC program areas were asked to identify tourism industry contacts who had received Destination BC programs or services. All businesses/organizations identified were included in the survey. For some organizations, the survey contact list may have included multiple contacts. After survey administration was complete, if more than one respondent completed the survey for the same organization, the survey completion used for the survey was selected per the following criteria: the most complete survey; otherwise, the survey completed by the highest position within the organization; otherwise, randomly selected. Only ten duplicate surveys were removed.

2.1.3 Response Rates

A total of 2,950 stakeholders were asked to complete the 2015 Stakeholder Satisfaction Survey, of which 1,037 completed the survey, for an overall response rate of 35%. The number of surveys obtained was similar to 2014 (1,153 with a 36% response rate). Table 2-1 illustrates the distribution of the Destination BC stakeholder population and the survey response for each stratum and selected sub-strata. The survey response rates indicate strong levels of engagement amongst many of the stakeholder groups. Response rates by strata varied from 33% for Tourism Businesses and Travel Trade & Destination Canada to as high as 80% for primary sector organizations.

Table 2-1
Population and Survey Response Rates by Stakeholder Stratum

Type	Population	Online Surveys	Telephone Surveys	Total Surveys	Response Rate
Grand Total	**2,950**	**820**	**217**	**1,037**	**35%**
DMOs	**148**	**69**	**5**	**74**	**50%**
Regional DMOs	6	5		5	83%
Large CDMOs	6	3	1	4	67%
Community and City DMOs	134	61	4	65	49%
Primary Sector Organizations	**15**	**12**		**12**	**80%**
Travel Trade & Destination Canada	**222**	**60**	**13**	**73**	**33%**
Destination Canada	6	5		5	83%
Tour Operators -- Key Accounts	200	46	13	59	30%
N. America	17	10		10	59%
Germany/ UK	33	21		21	64%
Asia/ Australia/NZ	150	15	13	28	19%
Receptive Tour Operators					
Worldwide/ Asia Pacific	16	9		9	56%
Delivery Organizations	**202**	**93**	**0**	**93**	**46%**
Visitor Centres	**100**	**55**	**0**	**55**	**55%**
Small	71	33		33	46%
Medium	19	14		14	74%
Large	10	8		8	80%
WorldHost® Trainers	**93**	**34**	**0**	**34**	**37%**
Community Delivery Orgs	24	10		10	42%
Private Training Company	25	5		5	20%
Corporate Delivery Orgs	17	5		5	29%
Post Secondary Institutions	27	14		14	52%
go2HR	**9**	**4**		**4**	**44%**
Travel Media	**72**	**27**	**6**	**33**	**46%**
Freelance	32	10	4	14	44%
Magazine, Newspaper, Online Editors/Other	40	17	2	19	48%
Tourism Businesses	**2,292**	**559**	**193**	**752**	**33%**

Table 2-2 presents the distribution of the tourism business stakeholder population and response rates by region. Quotas for a minimum number of survey completions by region were set, as well as quotas for a minimum number of respondents by region sufficiently familiar with Destination BC to answer the evaluative questions (to enable reporting with greater confidence at the regional level). As Destination BC required that unweighted data be used in the analysis, the Consultant took steps to try and achieve the most representative distribution of survey completions across the regions included in the study. Due to the smaller number of tourism businesses relative to other tourism regions, the Cariboo Chilcotin Coast and Northern BC regions were somewhat over-sampled as a result of efforts to achieve minimum quotas for reporting purposes.

Table 2-2
Population and Survey Response Rates by Tourism Businesses by Region

Type	Population	*% of Population*	Survey Completions	Response Rate	*% of Surveys*
Tourism Businesses	2,292	100%	752	33%	100%
Vancouver Island	523	23%	173	33%	23%
Vancouver Coast and Mountains	598	26%	171	29%	23%
Thompson Okanagan	585	26%	175	30%	23%
Kootenay Rockies	284	12%	112	39%	15%
Cariboo Chilcotin Coast	119	5%	52	44%	7%
Northern British Columbia	183	8%	69	38%	9%

2.2 Level of Familiarity with Destination BC

Table 2-3 below presents the levels of familiarity with services and programs offered by Destination BC; also listed are the margins of sampling error associated with the survey results for the evaluative questions asked of stakeholders who were familiar with Destination BC. Respondents were asked how familiar they were with services and programs offered by Destination BC. Those respondents who answered somewhat familiar, familiar or very familiar went on to complete additional questions evaluating their satisfaction with specific programs/services, communication and overall satisfaction. Those respondents who answered not very familiar or not familiar at all were skipped to the demographics section and conclusion of the survey. Those unfamiliar with Destination BC might not be expected to have sufficient understanding of the organization's activities to hold an informed opinion.

As indicated, 903 (87%) of all respondents were at least somewhat familiar with Destination BC's services and programs. Levels of familiarity were generally quite high overall (ranging from 83% to 100% across every strata). Organizations that promote or support tourism industry (Primary Sector Organizations, Travel Media and the Travel Trade & Destination Canada) all reported being at least somewhat familiar with Destination BC. Further, two-fifths (83%) of all tourism businesses indicated that they were at least somewhat familiar with Destination BC. Within the tourism businesses stratum, lower levels of familiarity were reported amongst products/operators as compared to accommodations businesses.

Table 2-3 Level of Familiarity with Destination BC

	How familiar is your organization with the services and programs offered by Destination BC?							
	Not familiar at all	**Not very familiar**	**Some-what familiar**	**Familiar**	**Very familiar**	**Overall Familiar** (Somewhat + Familiar + Very)	**# familiar** (qualified for evaluation questions)	**Est. Sampling Error (±%)***
All Stakeholders	**3%**	**10%**	**33%**	**38%**	**16%**	**87%**	**903**	**2.7%**
Strata								
DMOs	0%	3%	14%	49%	35%	97%	72	8.3%
Primary Sector Org.	0%	0%	25%	50%	25%	100%	12	13.1%
Travel Trade	0%	0%	11%	41%	48%	100%	73	9.2%
Delivery Organizations	0%	3%	15%	63%	18%	97%	90	7.7%
Travel Media	0%	0%	9%	52%	39%	100%	33	12.6%
Tourism Businesses	4%	13%	41%	32%	10%	83%	623	3.4%

n=1,037. *margin of error at a 95% confidence level (i.e., the survey results should be within the margin of error of the actual value for the population 19 times out of 20).

SECTION 3: RESULTS

The intent of the *2015 Stakeholder Satisfaction Study* is to assess stakeholder satisfaction with services provided by Destination BC and to identify how Destination BC can better support BC's tourism industry. The results of the survey may also be used to track changes in performance, satisfaction and perception when compared against past and future cycles of the survey.

The results of this summary report section explore stakeholder views on the following:

- ratings of Destination BC's performance in delivering aspects of its legislative mandate (Section 3.1);
- overall satisfaction with Destination BC (Section 3.2);
- perceptions of and attitudes towards Destination BC (Section 3.3);
- Rating of BC's tourism industry collaboration and alignment (Section 3.4);
- additional comments about Destination BC volunteered by respondents (Section 3.5) and
- demographics and firmographics of stakeholder organizations (Section 3.6);

Demographics and firmographics were asked of all survey respondents, including those who were unfamiliar with Destination BC. Survey respondents who were at least somewhat familiar with Destination BC's services and programs were asked to provide their opinions on the various issues examined in the study. The overall survey results for these questions may be considered accurate within ±2.7% at a 95% confidence level (19 times out of 20).

In calculating mean scores for ratings given on scale questions, responses of "don't know/not relevant" and no response are necessarily excluded from the calculation. In reporting proportions of respondents answering the same questions, responses of "don't know/not relevant" and no response are included in the denominator for percentages. It may be noted that the tourism businesses stakeholder stratum comprises about 73% of all survey respondents, which tends to weight the overall results towards the opinion of this strata.

3.1 Perceived Performance in Delivering Legislative Mandate

3.1.1 Destination BC's Performance in Delivering its Mandate – All Stakeholders

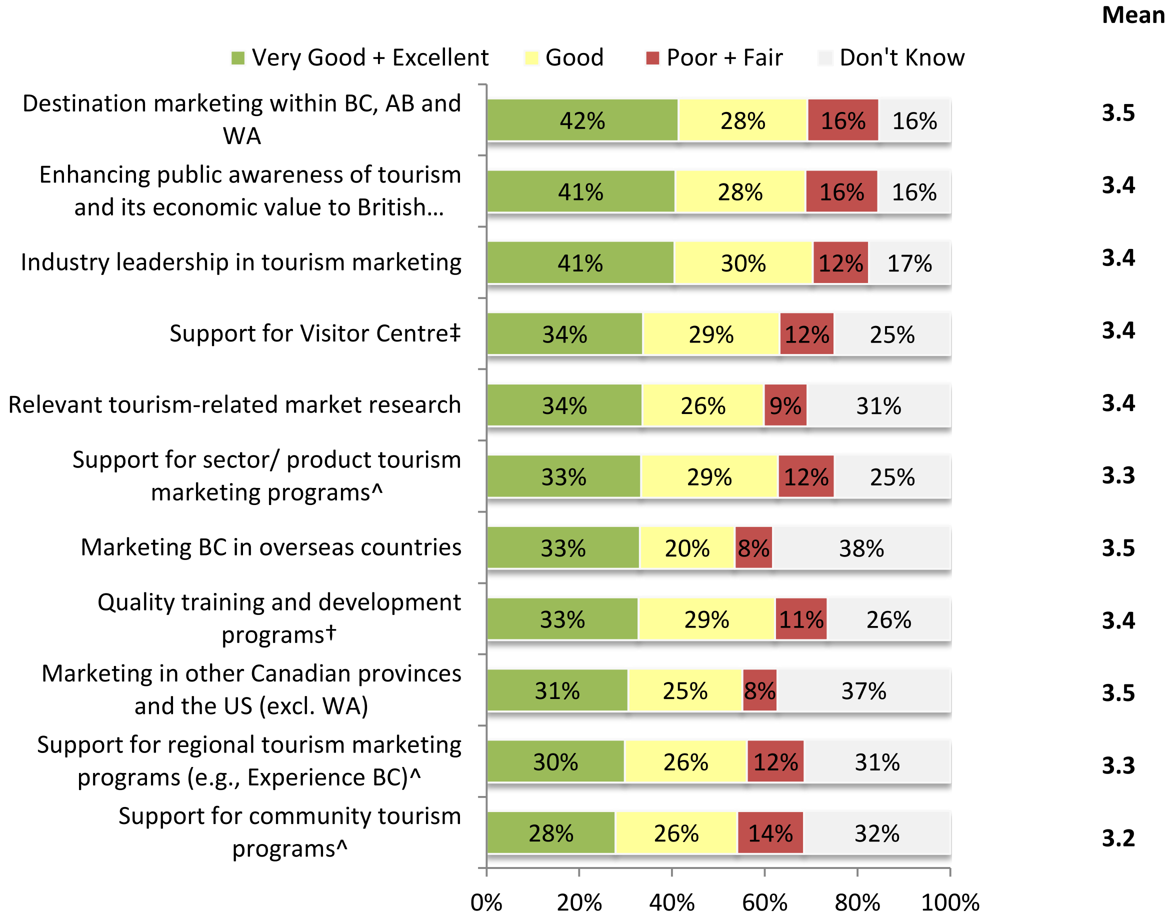
The 2015 Stakeholder Satisfaction Study asked respondents to rate Destination BC's performance in delivering various aspects of its legislative mandate on a scale from 1 to 5 (poor to excellent). On the next page in Figure 3-1 are the results for all stakeholders surveyed.

The survey results suggest that, taken as a whole, Destination BC's stakeholders see the organization performing best in terms of marketing BC within the province, within other Canadian provinces, the US and overseas (mean score of 3.5 in all three of these marketing questions; with 42% giving top-two positive ratings, (i.e., rating delivery in this area as very good or excellent) in destination marketing within British Columbia (BC), Alberta (AB), and Washington state (WA)). Industry leadership in tourism marketing and enhancing public awareness of tourism and its economic value to BC also received high rankings from stakeholders overall (across all stratums), with 41% giving top-two positive ratings in both of these areas.

Performance in terms of supporting community tourism programs was rated the lowest of all of the measures (3.2 mean score; 28% giving top-two positive ratings). Community tourism marketing programs include Community Tourism Foundations, Community Tourism Opportunities, and other similar programs. The various other aspects of the mandate all had mean scores of between 3.3 and 3.4, with between about one-quarter and one-third of respondents considering Destination BC's performance to be very good or excellent in the individual areas (i.e. receiving the top-two positive ratings).

It may be noted that, for individual aspects of the mandate, the number of respondents who were unable to provide an opinion (selecting "don't know/not relevant" as a response) varied by question, ranging from between 16% (enhancing public awareness of tourism and its economic value to British Columbia) to 38% (marketing BC in overseas countries as a tourist destination).

Figure 3-1: Stakeholder Ratings of Destination BC Performance in Delivering Mandate (All Stakeholders)



n = 707-903; measures are ranked by mean score.
† not asked of Travel Media or Travel Trade (excluding Destination Canada).
‡ not asked of Primary Sector Organizations; Travel Trade; or Travel Media.
^ not asked of Travel Trade, Delivery Organizations or Travel Media
^^ not asked of Travel Trade

3.1.2 Performance in Delivering Mandate – by Stakeholder Stratum

Table 3-1 on the following page summarizes the opinions of different stakeholder strata regarding Destination BC's performance on delivering on various aspects of mandate.

Overall, Travel Media, and Travel Trade & Destination Canada gave generally more positive ratings, while DMOs and tourism businesses were somewhat less positive in their perception of Destination BC's performance.

Table 3-1
Performance in Delivering Mandate by Stakeholder Stratum - Mean Scores

	All Stakeholders	DMOs	Primary Sector Orgs	Travel Trade & DC	Delivery Orgs	Travel Media	Tourism Businesses
Destination marketing within BC, AB and WA	**3.5**	3.4	3.3	3.9	3.7	4.2	3.5
Marketing in other Canadian provinces and the US (excl. WA)	**3.5**	3.5	3.5	3.7	3.5	4.3	3.4
Marketing BC in overseas countries	**3.5**	3.5	3.3	3.9	3.6	4.5	3.4
Support for regional tourism marketing programs (e.g., Experience BC)	**3.3**	3.2	3.5	-	-	-	3.3
Support for sector/ product tourism marketing programs	**3.3**	3.1	4.6	-	-	-	3.3
Support for community tourism programs	**3.2**	3.4	3.7	-	-	-	3.2
Industry leadership in tourism marketing	**3.4**	3.1	3.6	3.8	3.6	4.1	3.3
Quality training and development programs†	**3.4**	3.3	3.7	3.0†	3.8	-	3.3
Support for Visitor Centres	**3.4**	3.2	-	-	3.6	-	3.3
Relevant tourism-related market research	**3.4**	3.4	3.5	3.7	3.7	4.1	3.3
Enhancing public awareness of tourism and its economic value to British Columbia	**3.4**	3.0	3.1	4.0	3.5	4.2	3.4

† Within Travel Trade & Destination Canada stakeholder group, only asked of Destination Canada.
-- Not asked of stakeholder group
n=707-903

The following table illustrates a year-over-year comparison of mean scores and top-two ratings for Destination BC delivering its mandate. Destination BC improved in all aspects of this section except for support for Visitor Centers where the top two score dropped slightly from 36% to 34%. However, the mean score for this category remained the same at one decimal place. Changes of note include marketing of BC in overseas countries (increase of 9% top-two rating) and enhancing public awareness of tourism and its economic value to BC (increase of 8% top-two rating).

Table 3-2 Performance in Delivering Mandate – Longitudinal Comparison

Aspect of Legislative Mandate	2014 Mean Score	2014 % Top-Two Positive Ratings (4 or 5)	2015 Mean Score	2015 % Top-Two Positive Ratings (4 or 5)
Destination marketing within BC, AB and WA	3.5	36%	3.5	42%
Industry leadership in tourism marketing	3.3	35%	3.4	41%
Enhancing public awareness of tourism and its economic value to BC	3.2	33%	3.4	41%
Support for Visitor Centres	3.4	36%	3.4	34%
Relevant tourism-related market research	3.3	27%	3.4	34%
Marketing BC in overseas countries	3.3	24%	3.5	33%
Quality training and development programs	3.3	32%	3.4	33%
Support for sector/ product tourism marketing programs	3.2	27%	3.3	33%
Marketing in other Canadian provinces and the US (excl. WA)	3.3	26%	3.5	31%
Support for regional tourism marketing programs	3.1	23%	3.3	30%
Support for community tourism programs	3.2	25%	3.2	28%

3.2 Overall Satisfaction with Destination BC

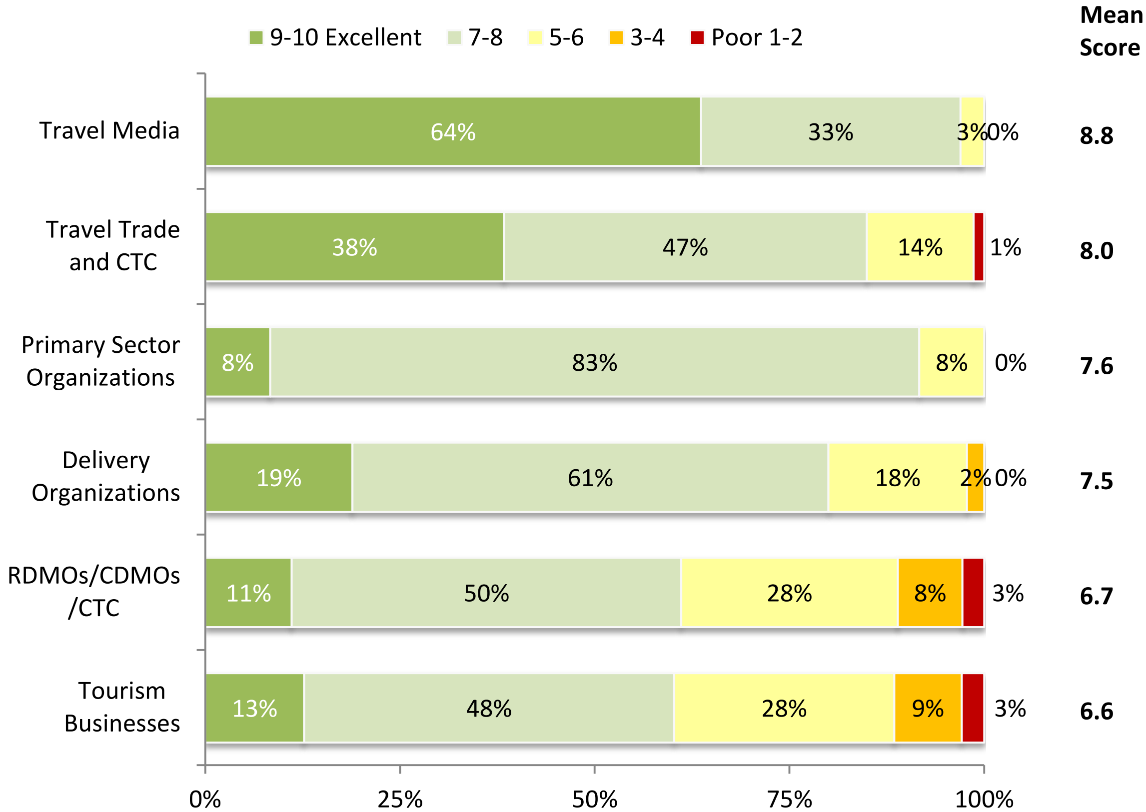
3.2.1 Overall Satisfaction Rating – by Stakeholder Stratum

Survey respondents were asked to rate their overall satisfaction with Destination BC on a scale of one to ten. The distribution of responses is highlighted in Figure 3-2 by stakeholder stratum.

The Travel Media and the Travel Trade & Destination Canada were most satisfied with Destination BC's overall performance, with mean scores of 8.8 and 8.0 respectively, and large proportions assigning top scores. The majority of Delivery Organizations and Primary Sector Organizations also appear to be quite satisfied with Destination BC's performance (7.5 and 7.6 respectively), although it may be noted that Delivery Organizations had a notable proportions of respondents assigning mid-range scores of five or six (18%).

Opinion is somewhat more polarized amongst DMOs (mean score of 6.7): while 11% gave top-two scores and half gave scores of 7 or 8, fully 28% gave a middle-of-the-road scores of 5 or 6 and another 11% gave scores of 4 or lower. This pattern is almost identical amongst tourism businesses, with 13% giving top-two scores and 12% giving scores of four or lower.

Figure 3-2: Overall Satisfaction by Stakeholder Stratum (Ranked by Mean Score)



n=903

Table 3-3 below summarizes the key results presented in the preceding figures.

Table 3-3 Summary of Overall Satisfaction by Stratum

	Mean Score	% Low Satisfaction (1-4)	% High Satisfaction (7-10)
Strata			
DMOs	6.7	11%	61%
Primary Sector Organizations	7.6	0%	92%
Travel Trade & Destination Canada	8.0	1%	85%
Delivery Organizations	7.5	2%	80%
Travel Media	8.8	0%	97%
Tourism Businesses	6.6	12%	60%

n=903

Table 3-4 shows a year-over-year comparison of overall satisfaction results by strata. Almost all categories registered an increase in overall satisfaction in 2015. The greatest increases in satisfaction were found in Primary Sector Organizations (an increase of 22%), DMOs and tourism businesses (an increase of 13% and 12% respectively).

Table 3-4 Overall Satisfaction – Longitudinal Comparison

Stakeholder Stratum	2014		2015	
	Mean Score	% Top-Four Positive Ratings (7 to 10)	Mean Score	% Top-Four Positive Ratings (7 to 10)
Travel Media	8.7	97%	8.8	97%
Travel Trade & Destination Canada	8.2	87%	8.0	85%
Delivery Organizations	7.6	78%	7.5	80%
Primary Sector Organizations	6.9	70%	7.6	92%
DMOs	6.2	46%	6.7	61%
Tourism Businesses	6.1	46%	6.6	60%

3.2.2 Stakeholder Suggestions for Improving Satisfaction

Survey respondents who scored their overall satisfaction as less than nine out of ten (750 or 83% of all eligible respondents) were asked how their overall satisfaction with Destination BC could be improved. Of these, 413 survey participants offered suggestions. Themes identified in their comments are listed in Table 3-5.

Some respondents recommended improvements to the way Destination BC markets the province as a tourist destination. An overarching theme amongst many comments was a call for more engagement with stakeholders: a number of respondents suggested that marketing strategies, tools, and advertisements should be better communicated to or shared with stakeholders, while others gave comments indicating a desire for better communication with and/or more outreach to stakeholders.

Another popular theme amongst stakeholder comments was a desire to have a better understanding of Destination BC's role and the services that Destination BC provides; this too, centered around communication, as many comments in this category suggested that Destination BC should reach out to stakeholders and provide information about programs and services Destination BC has to offer. Stakeholder satisfaction was also expressed in stakeholder comments, with many using the open-ended field to comment that they were happy with Destination BC services, and that the new leadership structure at Destination BC either has improved satisfaction or is expected to improve satisfaction in future.

Table 3-5
What could Destination BC do to improve your overall satisfaction level? – Themes

	% of respondents
Marketing Related	
Increase marketing efforts highlighting smaller regions/decrease focus on popular destinations (i.e. Vancouver, Victoria, Whistler and Okanagan)	10%
Increase and communicate marketing strategies to stakeholders and industry partners	8%
Increase marketing efforts internationally (North America and overseas)	8%
Promote/focus on specific sectors and attractions	6%
Promote and share campaigns and advertising via social media channels/improve online search queries for accommodations and attractions	4%
Improve/update/enhance functionality of Destination BC website	4%
More marketing materials in print form/bring back print form of Accommodations Guide	3%
Other Themes	
Greater coordination/communication with tourism partners, stakeholders, and communities	14%
Increase awareness of Destination BC services and programs/ increased communication on what services and programs are offered by Destination BC	9%
Increase interaction and support with smaller markets/operators	9%
Happy with most services	8%
Increased support, resources, funding for Visitor Centres	7%
Focus on province as a whole	6%
Increase funding support/improved allocation of funding resources/reduce fees	6%
New leadership structure at Destination BC may increase satisfaction in future/new leadership has improved satisfaction	5%
Greater transparency, accountability (i.e. follow-up with inquiries, circulate information about decision-making and solicit stakeholder input)	5%
Cannot think of specific improvement	4%
Other – general or unique response	11%
Total	**100%**

n=413; individual percentages may sum to greater than 100% due to multiple responses

3.2.3 Stakeholder Views on Destination BC's Most Important Role

All stakeholders who completed the survey online (telephone respondents were excluded), were asked to express in their own words their opinion on Destination BC's single most important role in supporting tourism in BC. Of the 732 respondents eligible to answer the question, 577 provided a response (79%). Themes identified in their responses are summarized in Table 3-6.

The majority of comments about Destination BC's single most important role focused on various types of marketing activity, whether marketing BC as a destination, promoting the province overseas, the importance of reinforcing the new branding for BC, providing support and communication in regards to marketing information and initiatives, promoting the whole province (and not just particular centres) and other related suggestions. Of note, 12% stated that the most important role should be to provide increased support for smaller areas and small businesses. Many stakeholders from small businesses felt that they had a disadvantage in the tourism marketplace due to their size and that additional funding, resources and support should be offered to small businesses. Further, some stakeholders from smaller geographic areas noted the same feeling of being at a market disadvantage due to their location and requested additional resources or support for businesses in their area.

Table 3-6
What is the single most important role for Destination BC in supporting tourism in British Columbia? – Themes

	% of respondents
Marketing Related	
Marketing BC as a destination	17%
Promotion to other countries/overseas	15%
Provide support and make available marketing resources/info	11%
Communicate with stakeholders regarding tourism/marketing initiatives	9%
Branding/reinforcement of brand	9%
Promote whole province (not just specific centres)	7%
Website content/update online links/promote use of website/promote using social media channels	7%
Promote specialized groups/sectors	5%
To increase media presence (using TV ads, printed advertising, coordinate media visits and interviews)	5%
Other promotion/marketing/advertising	10%
Other Themes	
To provide increased support for small areas/small businesses	12%
Satisfied with current role of Destination BC	6%
Increase collaboration among the provincial tourism network/build provincial tourism network	4%
Keep Visitor Centres open/Increase funding for Visitor Centres	5%
Other - unique or general response	12%
Total	**100%**

n= 577; Individual responses add to greater than 100% due to multiple responses.

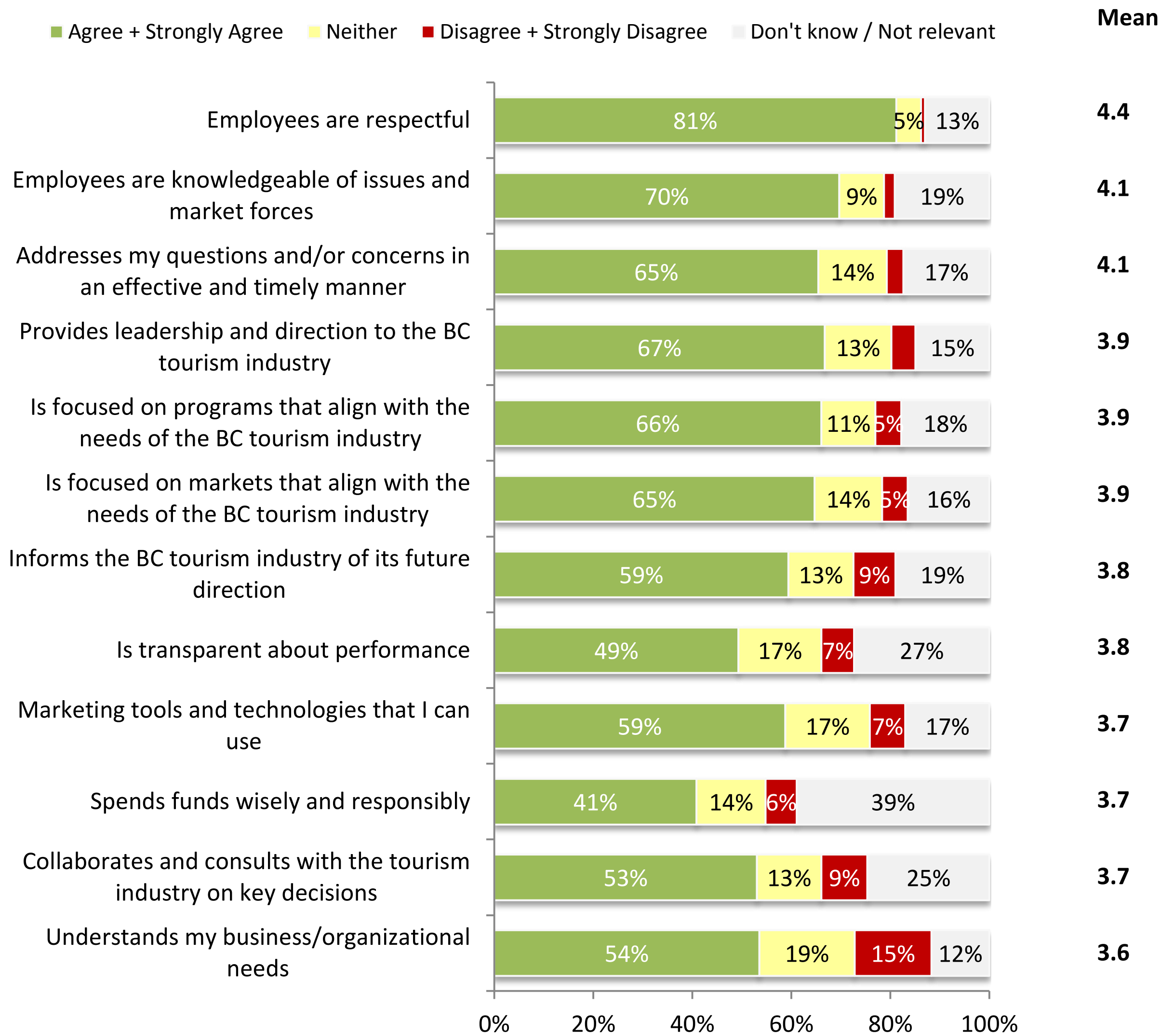
3.3 <u>Perception and Attitudes</u>

3.3.1 Overall Perceptions and Attitudes – All Stakeholders

Survey participants were asked to provide their level of agreement with a series of statements about Destination BC. The results indicate that stakeholders have good opinions of Destination BC's employees, including their respectfulness (mean score of 4.4), their effectiveness and timeliness in addressing questions and concerns (4.1) and their knowledge of issues and market forces (4.1). However, the survey results suggest stakeholders perceive a number of areas of concern, with less than half or only about half of respondents agreeing that the organization spends funds wisely and responsibly (41% either agreed or strongly agreed), is transparent about performance (49%), collaborates and consults with the industry on key decisions (53%), or informs the industry of its future direction (59%) (mean agreement scores of 3.7 and 3.8 for all of these areas).

The greatest percentage of "don't know/not relevant" responses were found in the categories of spending (39% don't know/not relevant) and in collaboration with the tourism industry (25% don't know/not relevant). The greatest level of disagreement was found in asking about Destination BC's understanding of stakeholders' business and organizational needs, with 15% noting disagree or strongly disagree.

Figure 3-3: Perception and Attitudes – All Stakeholders



n=637 to 832

3.3.2 Perceptions and Attitudes – by Stakeholder Stratum

In reviewing the proportions who agreed or strongly agreed in Table 3-7 below, readers are reminded that respondents may have indicated don't know/not relevant. For example, 39% of all respondents indicated 'don't know/not relevant' for the question on spending funds wisely and responsibly, while 41% indicated agree/strongly agree and only 6% indicated disagree/strongly disagree (with the rest being neither agreeing nor disagreeing). Other measures with higher levels of 'don't know/not relevant' responses include the questions regarding transparency with respect to performance (27%), and whether Destination BC collaborates and consults with the tourism industry on key decisions (25%). Such don't know/not relevant responses for other questions ranged from 13% - 19%.

Table 3-7
Perception and Attitudes by Stratum – % Top-Two Positive Ratings (Agree + Strongly Agree)

	DMOs	Primary Sector Orgs	Travel Trade & DC	Delivery Orgs	Travel Media	Tourism Businesses
Employees are respectful	80%	100%	92%	97%	100%	76%
Collaborates and consults with the tourism industry on key decisions	52%	75%	58%	69%	33%	51%
Addresses my questions and/or concerns in an effective and timely manner	56%	100%	86%	90%	100%	57%
Is transparent about performance	46%	75%	63%	64%	33%	46%
Employees are knowledgeable of issues and market forces	70%	100%	95%	91%	100%	60%
Provides leadership and direction to the BC tourism industry	71%	67%	78%	84%	61%	62%
Informs the BC tourism industry of its future direction	58%	75%	60%	73%	30%	59%
Is focused on markets that align with the needs of the BC tourism industry	76%	100%	77%	76%	61%	61%
Is focused on programs that align with the needs of the BC tourism industry	69%	92%	73%	75%	58%	61%
Spends funds wisely and responsibly	40%	92%	70%	47%	36%	35%
Understands my business/organizational needs	40%	67%	85%	69%	97%	46%
Marketing tools and technologies that I can use	52%	58%	68%	80%	58%	55%

3.4 Rating of BC's Tourism Industry Collaboration and Alignment

New to the 2015 survey cycle, respondents were asked to provide a rating of one to ten on the current level of collaboration and alignment of the British Columbia tourism industry. The following table outlines the key results by stratum. The Travel Media strata provided very high ratings in this area, with 94% assigning rankings of 7-10 and none giving poor ratings on the low end of the scale for this question (1-4), resulting in the highest mean score by stratum (8.5). Tourism businesses and DMOs were more divided in their ratings of collaboration and alignment, with greater percentages of respondents providing lower ratings on the scale (18% and 16%, respectively).

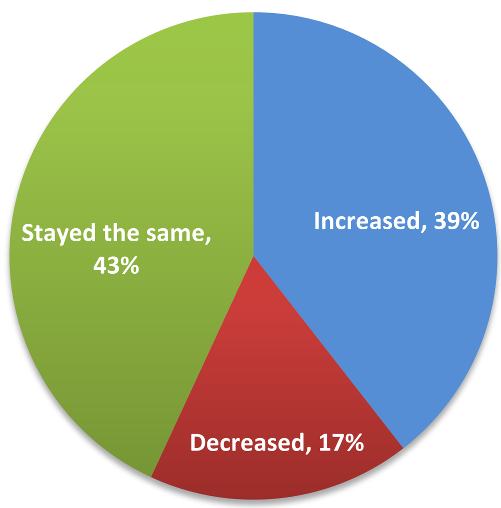
Table 3-8
Summary of Tourism Industry Collaboration and Alignment by Stratum and Region

	Mean Score	% Low Rating (1-4)	% High Rating (7-10)
Strata			
DMOs	6.2	16%	47%
Primary Sector Organizations	7.0	8%	67%
Travel Trade & Destination Canada	7.9	1%	86%
Delivery Organizations	7.2	1%	72%
Travel Media	8.5	0%	94%
Tourism Businesses	6.1	18%	49%

n=1037

Also new to 2015, stakeholders were asked if, over the past year, collaboration and alignment of BC's tourism industry had increased, decreased or stayed the same. Respondents were then asked to provide in their own words what single most important action Destination BC could take to increase collaboration and alignment in BC's tourism industry. Figure 3-4 below displays the distribution of responses for perceptions of collaboration and alignment, with more respondents indicating that it had increased of the past year (39%) than decreased (17%).

Figure 3-4: Perception of Current Collaboration and Alignment



n= 717

Table 3-9 below presents the themes coded from stakeholders' open-ended responses on the single most important action Destination BC could take to increase collaboration and alignment within the BC tourism industry. Greater communication with stakeholders and/or between industry partners was the most common theme noted by stakeholders (19%). Of the marketing-related themes, increased marketing efforts provincially, nationally and internationally and greater collaboration and alignment with regions/sectors were the most commonly noted themes. Some stakeholders experienced difficulties interpreting/understanding this question, and noted in their responses that they were unsure what was meant by collaboration and/or alignment (3%).

Table 3-9
What is the single most important action Destination BC could take to increase collaboration and alignment in BC's tourism industry? – Themes

	% of respondents
Marketing Related	
More advertising/increased marketing efforts (provincial, national and international)	15%
Greater collaboration and alignment with regions/sectors	9%
Market BC as a whole /less focus on popular BC destinations	8%
Emphasize collaborative marketing strategies/communication and dissemination of marketing strategies online	7%
More online advertising/marketing (includes social media)	3%
Other Themes	
Greater communication with stakeholders and/or between industry partners	19%
Greater support for small businesses/small communities	8%
Emphasize role of Destination BC/increase awareness of Destination BC services	6%
Host more conferences/workshops/seminars/events with stakeholders	6%
Incorporate stakeholder feedback to decision making processes	5%
Increase face-to-face interaction	5%
Encourage government to recognize tourism issues (i.e. ferry costs/routes, taxation, funding) Destination BC	4%
Happy with Destination BC's current direction	4%
Comment related to survey question/understanding of question	3%
Other general or unique response	17%
Total	**100%**

n=520; individual percentages may sum to greater than 100% due to multiple responses

3.5 Additional Comments

At the conclusion of the survey, all respondents were given the opportunity to provide further comments. Of the 1,037 eligible respondents (online and telephone completions), 264 (25%) volunteered additional comments. Over one-quarter of those responding (37%) affirmed their general satisfaction with Destination BC and/or its programs/services. Another 15% suggested that Destination BC needs to increase the effectiveness of aspects of its marketing. Also of note were respondents raising concerns/dissatisfaction in regards to the new leadership structure at Destination BC (14%). Other comments were varied, with more common themes presented below.

Table 3-7 Are there any other additional comments you would like to share?

	% of respondents
Generally satisfied with Destination BC organization/services	37%
Market the province/sector/product better/more effectively	15%
Concerns with “new” Destination BC/dissatisfaction with Destination BC	14%
More assistance/information/training desired	10%
Greater communication needed	9%
Concern/needs related to Visitor Centres	5%
Greater online focus/efforts needed	5%
Greater recognition from government desired	3%
Other - unique or general comment	12%
Total	100%

n=264; Individual responses add to greater than 100% due to multiple responses

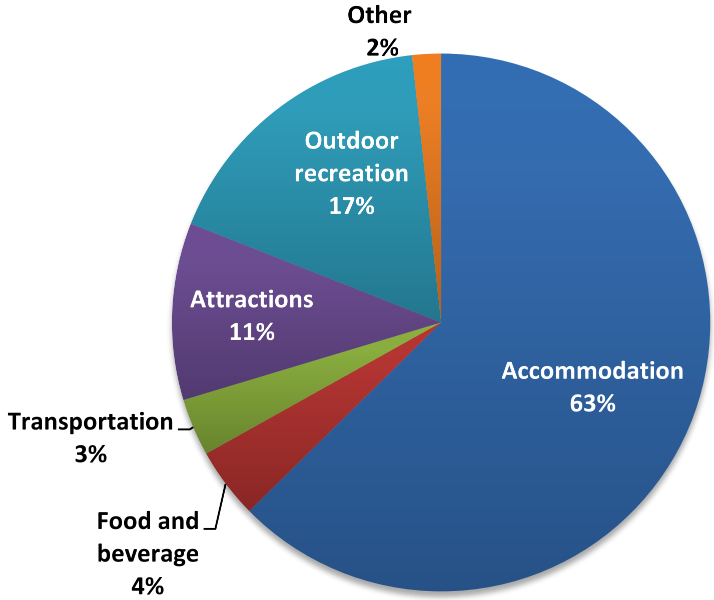
3.6 Demographics and Firmographics

All respondents who participated in the survey were asked the demographics and firmographics (characteristics of organizations) section of the questionnaire. Respondents who indicated they were not familiar with Destination BC were directed to this section after Q3 (level of familiarity), while all other respondents completed this section after finishing the evaluation questions.

3.6.1 Firmographics of Tourism Businesses

As illustrated in Figure 3-5, the majority of tourism businesses surveyed were accommodations operations (63%). Of note, respondents from Cariboo Chilcotin Coast had the highest proportion, at more than three quarters of businesses surveyed in this region.

Figure 3-1: Which of the following best describes your organization's type of operation?



n=752

Table 3-1 Type of Operation by Region

	All Tourism Businesses	Vancouver Island	Vancouver Coast and Mountains	Thompson Okanagan	Northern British Columbia	Kootenay Rockies	Cariboo Chilcotin Coast
Accommodation	**63%**	58%	54%	64%	75%	66%	79%
Food and beverage	**4%**	3%	4%	9%	1%	2%	2%
Transportation	**3%**	5%	6%	2%	4%	0%	0%
Attractions	**11%**	12%	18%	7%	9%	6%	8%
Outdoor recreation	**17%**	20%	18%	14%	10%	26%	10%
Other	**2%**	2%	2%	3%	0%	0%	2%
Total	**100%**	100%	100%	100%	100%	100%	100%

n=752

Table 3-13 shows the distribution of the number of years the tourism businesses surveyed had been in business. Survey respondents were dispersed relatively evenly across the five-year interval scale, with the exception of fewer businesses having been involved in tourism between either 21 to 25 years or 26 to 30 years than involved for more than 30 years.

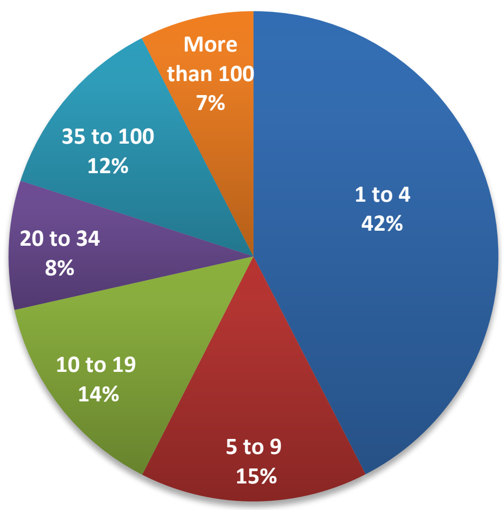
Table 3-2 Years Involved in the Tourism Industry

Response	% of respondents
1 to 5 years	14%
6 to 10 years	19%
11 to 15 years	17%
16 to 20 years	14%
21 to 25 years	10%
26 to 30 years	8%
> 30 years	18%

n=650

The majority of tourism businesses can be considered small businesses: almost six in ten (58%) have fewer than ten employees during their peak season, with 42% having fewer than five. On the other end of the spectrum, 7% of tourism businesses in BC are large businesses with more than 100 employees at their peak and 12% are medium-sized businesses with between 35 and 100 employees. Figure 3-6 illustrates the breakdown of this industry stratum by size.

Figure 3-2: How many employees does your organization or branch employ during your peak season?



n=737

SECTION 4: APPENDIX

4.1 Additional Methodology Details

4.1.1 Survey Development

The survey was developed by Destination BC, with consultation from the Consultant. The survey was designed to measure:

- Level of familiarity with Destination BC
- Performance on delivering Destinations BC's mandate
- Overall satisfaction with the performance of Destination BC
- Satisfaction and importance of Destination BC's programs and service areas
- Understanding perceptions and attitudes of stakeholders
- Profile of stakeholder characteristics (demographics and firmographics)

The Consultant updated the programming with new questions proposed by Destination BC. In addition, the survey was translated into Chinese (Mandarin) in order to garner a better response from those respondents from Mainland China. Email invitations were also developed in consultation with the Client.

4.1.2 Survey Administration

A soft launch of the survey was undertaken on Sunday, April 19, 2015 and the full survey administration launch was approved to go ahead on Tuesday, April 21 with an email invitation sent to all stakeholders. Four reminder emails with the final email invitation were sent on Wednesday, May 13 noting "Last chance to provide your opinion" within the subject line.

During survey administration, the Consultant fielded out-of-office replies and inquiries from respondents. If an out-of-office email reply indicated an alternate contact, the Consultant updated the survey case and forwarded an invitation to the new contact. If a respondent requested to be removed from any additional emailing the Consultant would flag the case as a survey refusal.

Telephone follow-up began on Monday, May 4 in an effort to improve the response rates of certain key stakeholder strata and to balance the tourism business response rates by region as closely as possible. A total of 3,154 calls were made to 2,837 cases that had not yet been completed online. In addition to reminding respondents to complete the survey, thus increasing the online completion rate, 217 interviews were completed over the phone. The overall response rate was increased from 17% to 35% (524 additional survey completions) as a result of the extension of the online deadline and subsequent telephone follow-up. The survey was shortened for those respondents who completed over the telephone in order to reduce response burden.

4.1.3 Data Analysis and Reporting

Quantitative data from the completed surveys were analyzed using SPSS, while open-ended question responses were cleaned and coded in MS Access. The data were analyzed on the basis of response frequencies, with cross-tabulations by demographic variables of particular interest.

All scale questions used five ordinals (i.e., scale of one to five) with the exception of the overall satisfaction question and tourism industry collaboration and alignment, which both used ten ordinals (i.e., scale of one to ten). Mean scores reported in the survey results are averages of all scores across all respondents to the given question, excluding responses of “don’t know/not relevant”. When proportions of respondents answering the scale questions are reported, responses of “don’t know/not relevant” are included in the denominator for the percentages. The proportions of respondents answering positively or negatively on scale questions are often summarized as the percentage who gave the top two positive ratings (four or five, e.g., very good or excellent) or bottom two negative ratings (one or two, e.g., poor or fair).