Program Evaluation & Market Research

Summary Report

2016 STAKEHOLDER SATISFACTION STUDY

Prepared for
Destination BC

Prepared by
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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 2016 *Stakeholder Satisfaction Study* is the third annual implementation of the survey.

1.2 Research Objectives

The intent of the *2016 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, 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 stakeholder's current and future needs of Destination BC.

SECTION 2: METHODOLOGY

2.1 Methodology

2.1.1 Scope of Work

The Destination BC *2016 Stakeholder Satisfaction Study* was conducted by R.A. Malatest & Associates Ltd. (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;
- Management of e-mail invitations and on-line 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 *2016 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, receptive tour operators, and the Destination Canada's overseas offices;
- Delivery organizations, which includes Visitor Centres, WorldHost® Trainers, and Hospitality Industry Education (go2 board members);
- Travel media; and
- Tourism businesses that were enrolled in the 2015 HelloBC® Listings Program or part of the Remarkable Experiences Program.

The list of stakeholders to include in survey administration was developed by Destination BC. Each of Destination BC's program area teams were asked to identify tourism industry contacts who had received Destination BC programs or services.

All businesses/organizations identified were included in the survey. To ensure the correct contact was included in the survey, prior to survey administration, Destination BC sent an initial e-mail to all participants introducing the survey and ensuring the correct contact was included. 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. A total of 19 duplicate surveys were removed.

2.1.3 Response Rates

A total of 2,884 stakeholders were asked to complete the 2016 Stakeholder Satisfaction Survey, of which 1,083 completed the survey, for an overall response rate of 38%. The number of surveys obtained for each stratum was similar to previous years. 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.

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

Type	Population	On-line Surveys	Telephone Surveys	Total Surveys	Response Rate
Grand Total	**2,884**	**930**	**153**	**1,083**	**38%**
DMOs	**146**	**63**	**0**	**63**	**43%**
Regional DMOs	5	2		2	40%
Large CDMOs	6	3		3	50%
Community and City DMOs	134	58		58	43%
Primary Sector Organizations	**34**	**16**	**2**	**18**	**53%**
Travel Trade & Destination Canada*	**152**	**60**	**8**	**68**	**45%**
Destination Canada	6	4		4	67%
Tour Operators - Key Accounts	146	56	8	64	44%
N. America	17	8	3	11	65%
Germany/ UK	24	13	2	15	63%
Asia/ Australia/NZ	89	25	3	28	31%
Receptive Tour Operators					
Worldwide/ Asia Pacific	15	10		10	67%
Delivery Organizations	**221**	**99**	**0**	**99**	**45%**
Visitor Centres	**110**	**58**	**0**	**58**	53%
Small	77	43		43	56%
Medium	22	9		9	41%
Large	11	6		6	55%
WorldHost® Trainers	**102**	**38**	**0**	**38**	37%
Corporate Clients	23	6		6	26%
Community Delivery Orgs	25	10		10	40%
Private Training Company	15	7		7	47%
Corporate Delivery Orgs	19	7		7	37%
Post Secondary Institutions	20	8		8	40%
Hospitality Industry Education	**9**	**3**	**0**	**3**	33%
Travel Media	**54**	**25**	**0**	**25**	**46%**
Freelance	33	13		13	39%
Magazine, Newspaper, On-line Editors/Other	21	12		12	57%
Tourism Businesses	**2,279**	**667**	**143**	**810**	**36%**

*This strata will be shortened to “Travel Trade” for the remainder of this report.

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	**2,279**	**100%**	**810**	**36%**	**100%**
Vancouver Island	498	22%	176	35%	22%
Vancouver Coast and Mountains	634	28%	215	34%	27%
Thompson Okanagan	586	26%	195	33%	24%
Kootenay Rockies	274	12%	102	37%	13%
Cariboo Chilcotin Coast	113	5%	51	45%	6%
Northern British Columbia	174	8%	71	41%	9%

In Table 2-3 a comparison of response rates by major strata is made. There was a 3% increase in the overall response rate (35% in 2015 to 38% in 2016). Other notable increases in response rate were achieved for Tourism Businesses (33% in 2015 to 36% in 2016) and the Travel Trade sector (33% in 2015 to 45% in 2016).

Table 2-3
Population and Survey Response Rates by Previous Cycles

			2016		
Stakeholder Strata	**2014 Response Rate**	**2015 Response Rate**	**Population**	**Survey Completions**	**Response Rate**
All Stakeholders	**36%**	**35%**	**2,884**	**1,083**	**38%**
DMOs	58%	50%	146	63	43%
Primary Sector Organizations	81%	80%	34	18	53%
Travel Trade	43%	33%	152	68	45%
Delivery Organizations	52%	46%	221	99	45%
Travel Media	48%	46%	54	25	46%
Tourism Businesses	33%	33%	2,279	810	36%

2.2 Level of Familiarity with Destination BC

Table 2-4 below presents the levels of familiarity with services and programs offered by 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, 912 (84%) 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 75% to 100% across every strata). Four-fifths (80%) 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 2-4
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)	**Number Familiar** (qualified for evaluation questions)
All Stakeholders	**3%**	**13%**	**35%**	**34%**	**14%**	**84%**	**912**
Stakeholder Strata							
DMOs	0%	5%	22%	41%	32%	95%	60
Primary Sector Org.'s	0%	11%	11%	44%	33%	89%	16
Travel Trade	0%	3%	16%	40%	41%	97%	66
Delivery Organizations	0%	3%	26%	43%	27%	97%	96
Travel Media	0%	0%	4%	40%	56%	100%	25
Tourism Businesses	4%	16%	40%	32%	8%	80%	649
Tourism Businesses by Region							
Vancouver Island	3%	18%	43%	28%	9%	80%	140
Vancouver Coast/Mountains	5%	13%	33%	38%	11%	83%	178
Thompson Okanagan	5%	18%	40%	31%	6%	77%	150
Northern BC	4%	17%	41%	31%	7%	79%	56
Kootenay Rockies	3%	12%	47%	33%	5%	85%	87
Cariboo Chilcotin Coast	10%	16%	49%	22%	4%	75%	38

n=1,083

SECTION 3: RESULTS

The intent of the *2016 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 perceptions when compared against past cycles of the survey.

The results in this section provide an overview of 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 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);

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 79% 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 2016 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). The results for all stakeholders surveyed are presented in Figure 3-1, ranked by mean score.

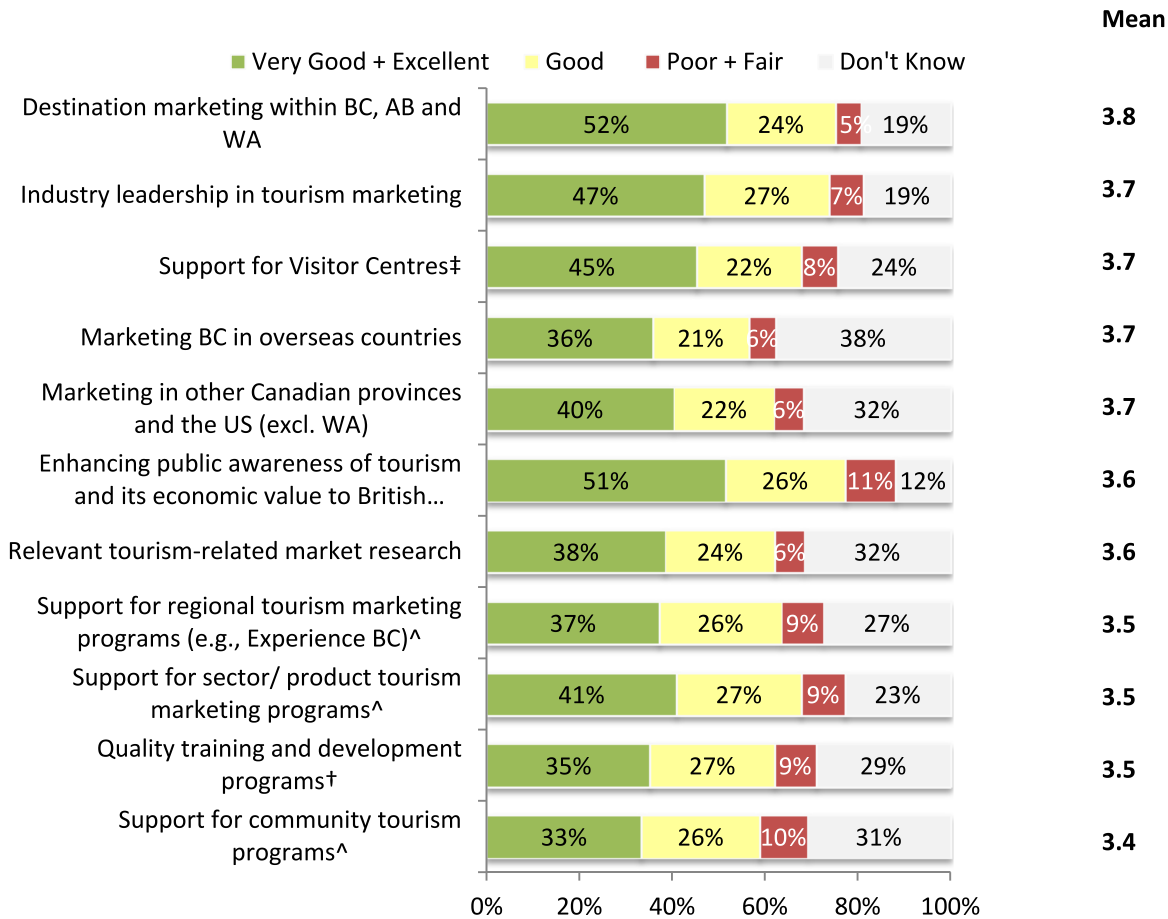
The surveys results suggest that, taken as a whole, Destination BC's stakeholders see the organization performing positively across all measures, with most mean scores 3.4 or greater. Destination BC is perceived to be performing best in terms of marketing BC within the province, within other Canadian provinces, the US and overseas (mean scores of 3.8, 3.7 and 3.7 respectively) with top-two ratings (i.e. rating delivery in this area as very good or excellent) of 52%, 47% and 45%. Support for Visitor Centres and industry leadership in tourism marketing also received high overall ratings from stakeholders with mean scores of 3.7 respectively. Enhancing public awareness of tourism and its economic value to BC is another area Destination BC is seen to be performing very well. Although this measure has a slightly lower mean score of 3.6, 51% of respondents gave a top-two positive rating to this measure.

Performance in terms of supporting community tourism programs was rated the lowest of all of the measures (3.4 mean score; 33% giving top-two positive ratings). Community tourism marketing programs included Community Tourism Foundations, Community Tourism Opportunities, and other similar programs in 2015-16. The various other aspects of the mandate all had mean scores of between 3.5 and 3.6, with between about one-third to half 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 12% (enhancing public awareness of tourism and its economic value to British Columbia) to 38% (marketing BC in overseas countries as a tourist destination). Across all measures, respondents selected don't know/not relevant responses in greater percentages than those rating the various measures poor or fair.

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



n = 725-912; 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 below summarizes the opinions of different stakeholder strata regarding Destination BC's performance in delivering on various aspects of its mandate. Overall, Travel Media, Delivery Organizations and Travel Trade gave generally more positive ratings, while tourism businesses were somewhat less positive in their perception of Destination BC's performance.

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

	All Stakeholders	DMOs	Primary Sector Orgs	Travel Trade	Delivery Orgs	Travel Media	Tourism Businesses
Destination marketing within BC, AB and WA	**3.8**	3.9	3.9	4.2	4.1	4.7	3.7
Marketing in other Canadian provinces and the US (excl. WA)	**3.7**	3.7	3.5	3.9	3.9	4.6	3.5
Marketing BC in overseas countries	**3.7**	3.9	3.7	4.0	3.9	4.1	3.5
Support for regional tourism marketing programs (e.g., Experience BC)	**3.5**	3.6	3.9	.	.	.	3.5
Support for sector/ product tourism marketing programs	**3.5**	3.5	3.9	.	.	.	3.5
Support for community tourism programs	**3.4**	3.6	3.6	.	.	.	3.4
Industry leadership in tourism marketing	**3.7**	3.9	3.6	4.1	4.0	4.5	3.5
Quality training and development programs†	**3.5**	3.6	3.7	4.5†	4.0	.	3.3
Support for Visitor Centres	**3.7**	3.5	.	.	4.0	.	3.6
Relevant tourism-related market research	**3.6**	3.7	3.8	4.1	3.9	3.8	3.5
Enhancing public awareness of tourism and its economic value to British Columbia	**3.6**	3.5	3.2	4.1	3.9	4.5	3.6

† Within Travel Trade stakeholder group, only asked of Destination Canada.
- Not asked of stakeholder strata
n=725-912

The following table provides 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 delivering its mandate. The greatest increase was noted in Destination BC's Support for Visitor Centres (increase of 11% top-two rating). It is notable that in the previous cycle of the Stakeholder Satisfaction Survey, Support for Visitor Centres was the only measure in which Destination BC saw a drop in ratings (from 36% top-two score in 2014 to 34% in 2015). Additional increases in ratings of note include Destination marketing of BC within BC, AB and WA and enhancing public awareness of tourism and its economic value to BC, both with increases of 10% in the top-two rating.

Table 3-2 Performance in Delivering Mandate – Longitudinal Comparison

	2014		2015		2016		
Aspect of Legislative Mandate	**Mean Score**	**% Top-Two Positive Ratings (4 or 5)**	**Mean Score**	**% Top-Two Positive Ratings (4 or 5)**	**Mean Score**	**% Top-Two Positive Ratings (4 or 5)**	**Percent Change in Mean (2015-2016)**
Destination marketing within BC, AB and WA	3.5	36%	3.5	42%	3.8	52%	+7.9%
Industry leadership in tourism marketing	3.3	35%	3.4	41%	3.7	47%	+8.1%
Support for Visitor Centres	3.4	36%	3.4	34%	3.7	45%	+8.1%
Marketing BC in overseas countries	3.3	24%	3.5	33%	3.7	36%	+5.4%
Marketing in other Canadian provinces and the US (excl. WA)	3.3	26%	3.5	31%	3.7	40%	+5.4%
Enhancing public awareness of tourism and its economic value to BC	3.2	33%	3.4	41%	3.6	51%	+5.6%
Relevant tourism-related market research	3.3	27%	3.4	34%	3.6	38%	+5.6%
Quality training and development programs	3.3	32%	3.4	33%	3.5	37%	+2.9%
Support for sector/ product tourism marketing programs	3.2	27%	3.3	33%	3.5	41%	+5.7%
Support for regional tourism marketing programs	3.1	23%	3.3	30%	3.5	35%	+5.7%
Support for community tourism programs	3.2	25%	3.2	28%	3.4	33%	+5.9%

3.2 Overall Satisfaction with Destination BC

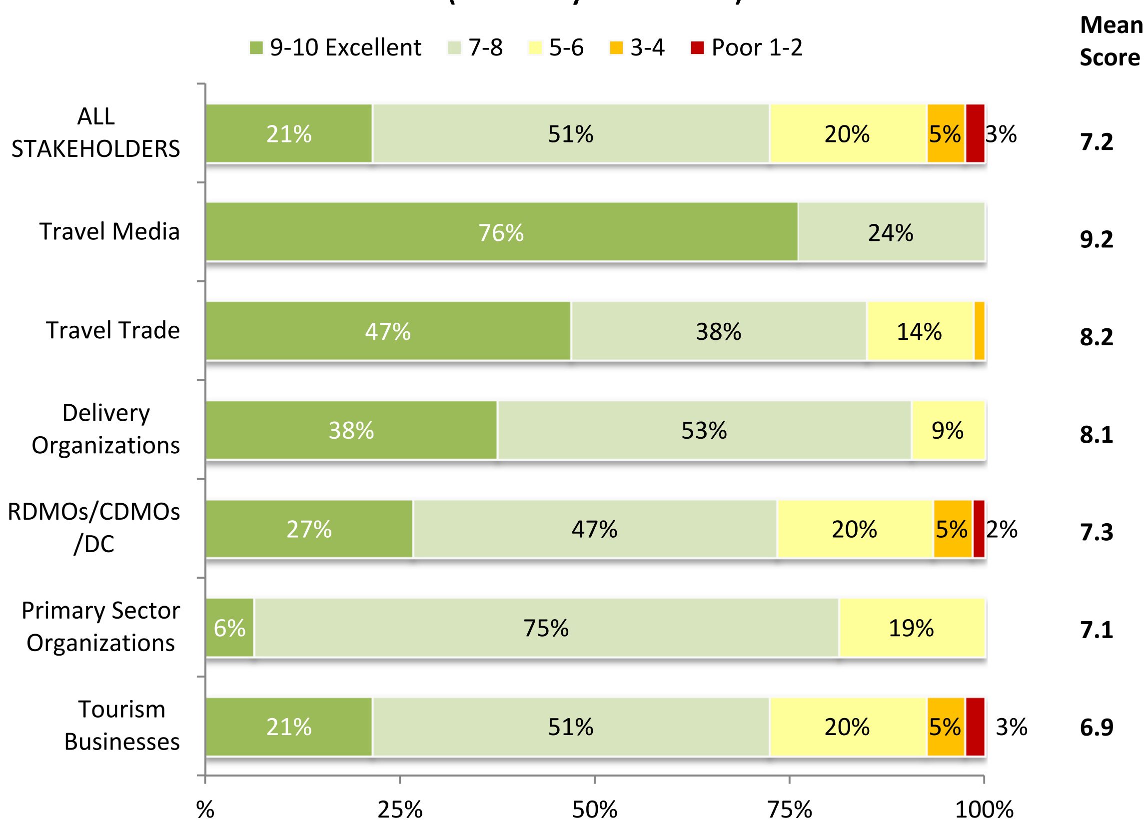
3.2.1 Overall Satisfaction Rating – by Stakeholder Stratum

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 for the overall survey result as well as by stakeholder stratum.

Overall, the average satisfaction mean score was 7.2, with a fifth (21%) of respondents giving top satisfaction scores (scores of nine or ten). Satisfaction scores were high across all strata with the majority of respondents in every stratum assigning satisfaction scores of seven to ten. The Travel Media and the Travel Trade categories were most satisfied with Destination BC's overall performance, with mean scores of 9.2 and 8.2 respectively, and large proportions assigning top scores of nine and ten (particularly Travel Media wherein 76% of respondents gave these top two satisfaction scores). The majority of Delivery Organizations and RDMOs/CDMOs also appear to be relatively satisfied with Destination BC's performance (mean scores of 8.1 and 7.3).

Primary Sector Organizations and Tourism Businesses ranked satisfaction scores more commonly as very good rather than excellent (assigning scores of seven to eight most frequently). Despite these slightly lower rankings than the accompanying stratum, mean scores remain high for respondents in these groups (mean score of 7.1 for Primary Sector Organizations and 6.9 for Tourism Businesses). Overall satisfaction amongst all stakeholders is generally positive, with 72% of respondents rating their satisfaction from seven to ten on the scale.

Figure 3-2: Overall Satisfaction by All Stakeholders and Stratum (Ranked by Mean Score)



n=912

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)
All Stakeholders	**7.2**	**8%**	**72%**
Stakeholder Strata			
DMOs	7.3	7%	73%
Primary Sector Organizations	7.1	%	81%
Travel Trade	8.2	2%	85%
Delivery Organizations	8.1	0%	91%
Travel Media	9.2	0%	100%
Tourism Businesses	6.9	10%	67%

n=912

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 2016. Of note, the greatest increases in satisfaction were found in DMOs (an increase of 12%) and Delivery Organizations (an increase of 11%).

Table 3-4
Overall Satisfaction – Longitudinal Comparison

Stakeholder Stratum	2014		2015		2016		Percent Change in Mean (2015-2016)
	Mean Score	% Top-Four Positive Ratings (7 to 10)	Mean Score	% Top-Four Positive Ratings (7 to 10)	Mean Score	% Top-Four Positive Ratings (7 to 10)	
All Stakeholders	**6.5**	**55%**	**6.9**	**66%**	**7.2**	**72%**	**+4.2%**
Stakeholder Strata							
Travel Media	8.7	97%	8.8	97%	9.2	100%	+4.3%
Travel Trade	8.2	87%	8.0	85%	8.2	85%	+2.4%
Delivery Organizations	7.6	78%	7.5	80%	8.1	91%	+7.4%
DMOs	6.2	46%	6.7	61%	7.3	73%	+8.2%
Primary Sector Organizations	6.9	70%	7.6	92%	7.1	81%	-7.0%
Tourism Businesses	6.1	46%	6.6	60%	6.9	67%	+4.3%

3.2.2 Stakeholder Suggestions for Improving Satisfaction

Survey respondents who scored their overall satisfaction as less than nine out of ten (716 or 82% of all eligible respondents) were asked how their overall satisfaction with Destination BC could be improved. Of these, 387 survey participants offered suggestions. Themes identified in their comments are listed in Table 3-5.

The greatest proportion of comments with respect to improving satisfaction were related to increasing awareness of Destination BC's services and programs and increasing communication about what the services and programs are. With 12% of respondents (who provided an overall satisfaction score of 8 or less) providing a comment with this theme.

The next most common themes were related to greater coordination/communication with tourism partners, stakeholders, and communities, and increased interaction and support with smaller markets/operators, both categories with 11% respectively.

Of marketing related themes, the highest proportion of comments (9%) were categorised as promote/focus on specific sectors and attractions, with 7% of respondents indicating overall satisfaction could be improved by increasing and communicating marketing strategies to stakeholders and industry partners. An additional 7% provided marketing related responses that fell into the category of: increase marketing efforts highlighting smaller regions/decrease focus on popular destinations (i.e. Vancouver, Victoria).

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

	% of respondents
Marketing Related	
Promote/focus on specific sectors and attractions	9%
Increase marketing strategies and better communicate marketing strategies to stakeholders and industry partners	7%
Increase marketing efforts highlighting smaller regions/decrease focus on popular destinations (i.e. Vancouver, Victoria)	7%
Increased marketing efforts internationally (North America and overseas)	5%
More marketing materials in print form/bring back print form of Accommodations Guide	3%
Other Themes	
Increase awareness of Destination BC services and programs/ increased communication on what services and programs are offered by Destination BC	12%
Greater coordination/communication with tourism partners, stakeholders, and communities	11%
Increase interaction and support with smaller markets/operators	11%
Increase funding support/improved allocation of funding resources/reduce fees	9%
Improve/update/enhance functionality of Destination BC website	7%
Happy with most services	7%
Focus on province as a whole	5%
Cannot think of specific improvement	3%
Increased support/resources/funding for Visitor Centres	3%
Greater transparency, accountability (i.e. follow-up with inquiries, circulate information about decision-making and solicit stakeholder input)	3%
Other – general or unique response	18%
Total	**100%**

n=387; 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 on-line (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. A total of 571 responses were provided. Themes identified in the responses are summarized in Table 3-6.

Comments were grouped into categories with representational overarching themes. Table 3-6 further divides response categories into those related to marketing and those related to other themes. Almost 1 in 5 responses regarding Destination BC's most important role in supporting tourism in BC relates to the marketing of BC as a destination (19%).

Additional popular responses were related to promotion of BC to other countries/overseas and website content/updating online links/promoting the use of website/promoting and using social media channels. Both categories garnered 11% of responses respectively. Comments related to website content and the use of social media suggested more collaborative use of social media could improve marketing efforts across the province by re-posting updates and advertisements from individual businesses and attractions.

Popular responses in "other" themes centered on providing increased support for small business/small areas (9%), and comments related to satisfaction with Destination BC (9%). Stakeholder comments from small businesses implied that they were at 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 commented that the same sentiment of being at a marked 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	19%
Promotion to other countries/overseas	11%
Website content/update online links/promote use of website/promote using social media channels	11%
Branding / reinforcement of brand	10%
To increase media presence (using TV ads, printed advertising, coordinate media visits and interviews)	8%
Provide support and make available marketing resources/info	7%
Communicate with stakeholders regarding tourism/marketing initiatives	7%
Promote whole province (not just specific centres)	7%
Promote specialized groups/sectors	5%
Other promotion/marketing/advertising	5%
Other Themes	
To provide increased support for small areas/small businesses	9%
Satisfied with current role of Destination BC	9%
To provide increased support for RDMOs/increase collaboration among the provincial tourism network/build provincial tourism	8%
Keep Visitor Centres open/increase funding for Visitor Centres	4%
Other – general or unique response	9%
Total	**100%**

n= 571; Individual responses add to greater than 100% due to multiple responses

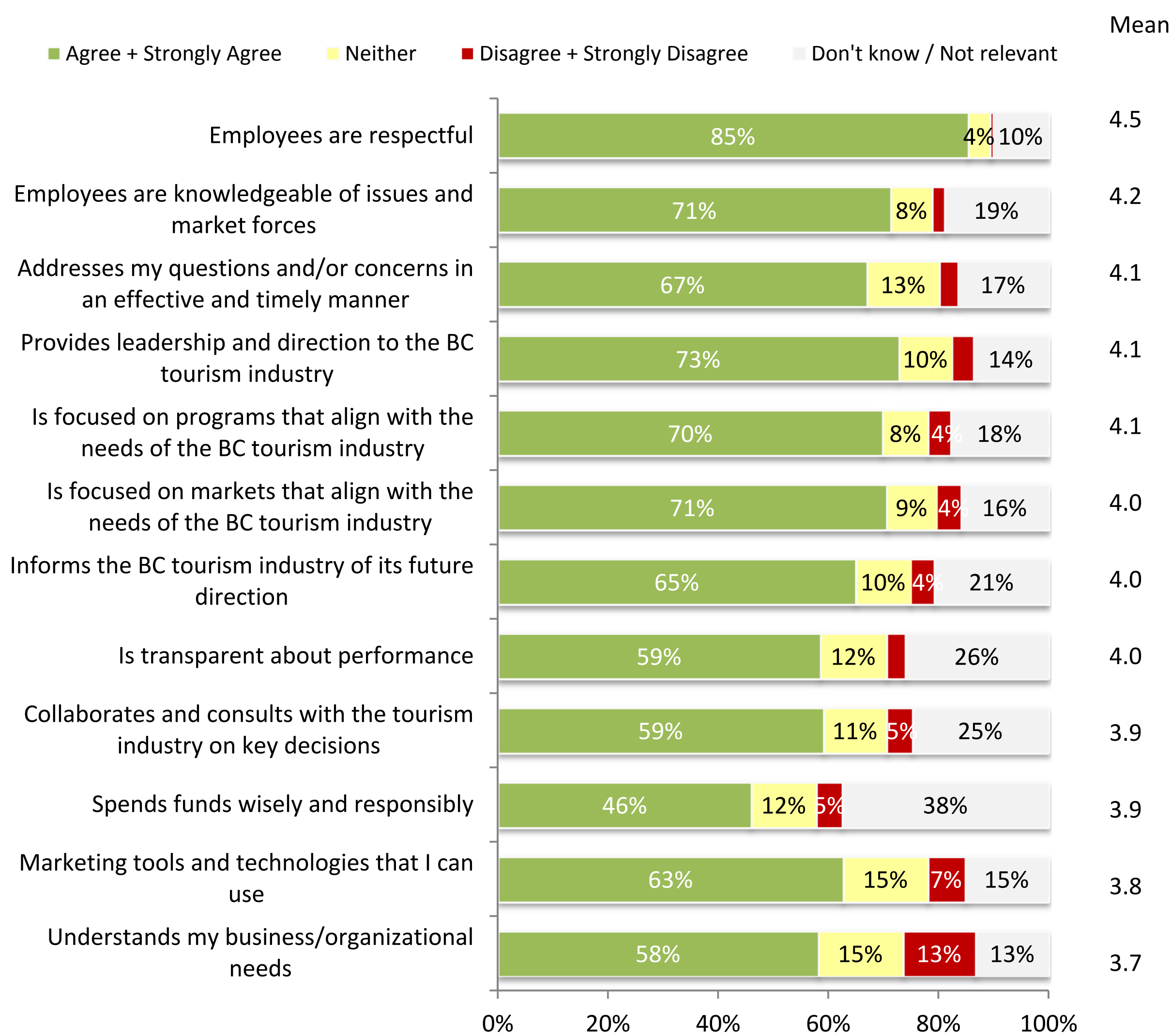
3.3 Perceptions and Attitudes

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 positive opinions of Destination BC's employees, including their respectfulness (mean score of 4.5) and employees knowledge of the issues and market forces (4.2). 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 (46% either agreed or strongly agreed). However, it should be noted that only 5% of respondents disagreed with the statement that the organization spends funds wisely and responsibly; 38% responded that they did not know or that the question was not relevant to them. Other areas of possible concern include: providing marketing tools and technologies I can use (agreement score of 63% but second lowest mean of 3.8) and understanding my business/organizational needs (lowest mean score of 3.7).

The greatest percentage of don't know/not relevant responses were found in the categories of spending (38% don't know/not relevant) and in being transparent about performance (26% 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 13% noting disagreement or strong disagreement.

Figure 3-3: Perceptions and Attitudes – All Stakeholders



n=819 to 823

3.3.2 Perceptions and Attitudes – by Stakeholder Stratum

In reviewing the proportions who agreed or strongly agreed in Table 3-7, readers are reminded that respondents may have indicated don't know/not relevant. For example, 68% of Travel Media respondents indicated don't know/not relevant for the question on Destination BC being transparent about its performance, leaving only 28% agreeing or strongly agreeing with this statement. Over a third (38%) of all respondents indicated 'don't know/not relevant' for the question about spending funds wisely and responsibly, while 46% indicated agree/strongly agree, and only 5% 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 (26% overall), and whether Destination BC collaborates and consults with the tourism industry on key decisions (25% overall).

Table 3-7 Perception and Attitudes by Stratum – Agree + Strongly Agree

	All Stakeholders	DMOs	Primary Sector Orgs	Travel Trade	Delivery Orgs	Travel Media	Tourism Businesses
Employees are respectful	**85%**	98%	100%	97%	97%	100%	80%
Collaborates and consults with the tourism industry on key decisions	**59%**	62%	79%	68%	67%	40%	57%
Addresses my questions and/or concerns in an effective and timely manner	**67%**	80%	86%	90%	92%	96%	57%
Is transparent about performance	**59%**	68%	86%	72%	68%	28%	55%
Employees are knowledgeable of issues and market forces	**71%**	88%	93%	97%	86%	96%	63%
Provides leadership and direction to the BC tourism industry	**73%**	81%	93%	87%	86%	72%	68%
Informs the BC tourism industry of its future direction	**65%**	83%	86%	71%	76%	36%	61%
Is focused on markets that align with the needs of the BC tourism industry	**70%**	82%	71%	83%	75%	64%	67%
Is focused on programs that align with the needs of the BC tourism industry	**71%**	75%	86%	79%	82%	60%	67%
Spends funds wisely and responsibly	**46%**	63%	79%	80%	54%	36%	39%
Understands my business/organizational needs	**58%**	53%	71%	92%	66%	92%	52%
Marketing tools and technologies that I can use	**63%**	53%	71%	82%	76%	56%	59%

3.4 Rating of BC's Tourism Industry Collaboration and Alignment

Stakeholders were asked for their perspective on how well BC's tourism industry is working together as a whole to influence travellers to visit British Columbia and grow the tourism industry. Respondents were asked to provide a rating of 1 to 10 on the current level of collaboration and alignment of the British Columbia tourism industry, with a score of 1 meaning fragmented and 10 meaning collaborative and well-aligned. This question was added to the Stakeholder Satisfaction Survey in 2015, and in 2016 some wording changes as well as an introductory definition were added to ensure the question was well understood (in 2015 some stakeholders noted in their open-ended comments uncertainty regarding how this question should be interpreted).

The following table outlines the key results by strata and region. The Travel Media stratum provided a very high rating, with 92% assigning a ranking of 7 – 10, and none providing poor ratings of 1-4, also resulting in the highest mean score (8.6). Primary Sector Organizations, Tourism Businesses and DMOs were more divided in their ratings of collaboration and alignment, with greater percentages of respondents providing lower ratings of 1-4 on the scale (39% of Primary Sector Organizations and 16% for both Tourism Businesses and DMOs, respectively).

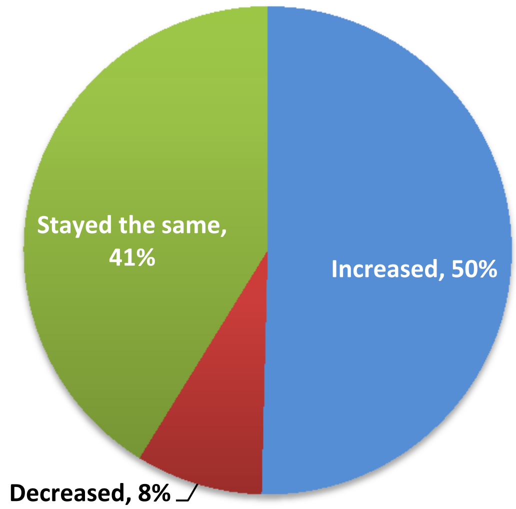
Table 3-8
Summary of Tourism Industry Collaboration and Alignment by Stratum

	Mean Score	% Low Rating (1-4)	% High Rating (7-10)
All Stakeholders	**6.5**	**15%**	**56%**
Stakeholder Strata			
DMOs	6.6	16%	57%
Primary Sector Organizations	5.5	39%	44%
Travel Trade	8.3	1%	88%
Delivery Organizations	7.1	7%	70%
Travel Media	8.6	0%	92%
Tourism Businesses	6.2	16%	50%

n=1,037

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. In Figure 3-4 below the distribution of responses for perceptions of collaboration and alignment is shown, the general consensus it that collaboration and alignment has increased in the past year (50% of respondents) more so than decreased (8% of respondents).

Figure 3-4: Perception of Current Collaboration and Alignment*



n= 750
*Does not include responses of Don't Know

The coded themes from stakeholders' open-ended responses with respect to the single most important action Destination BC could take to increase collaboration and alignment within the BC tourism industry are presented in Table 3-9. Comments were grouped into categories with representational overarching themes. Greater communication with stakeholders and/or between industry partners was the most commonly noted theme by stakeholders (12%) with respect to the single most important action Destination BC could take to increase collaboration and alignment in BC's tourism industry. The next most frequent themes in the "other themes" category included being happy with Destination BC's current direction and provision of greater support for small businesses/small communities, both representing 10% of respondent's comments.

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)	10%
Market BC as a whole /less focus on popular BC destinations	9%
Greater collaboration and alignment with regions/sectors	9%
Emphasize collaborative marketing strategies	9%
More online advertising/marketing (includes social media)	5%
Other Themes	
Greater communication with stakeholders and/or between industry partners	12%
Happy with Destination BC's current direction	10%
Greater support for small businesses/small communities	10%
Host more conferences/workshops/seminars/events with stakeholders	9%
Emphasize role of Destination BC/increase awareness of Destination BC services	8%
Incorporate stakeholder feedback to decision making processes	4%
Emphasize brand/promote branding/use branding to create awareness of tourism market	3%
Increase face-to-face interaction	3%
Encourage government to recognize tourism issues (i.e. ferry costs/routes, taxation, funding)	3%
Other general or unique response	17%
Total	**100%**

n=546; 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 1,083 eligible respondents (on-line and telephone completions), 244 (23%) volunteered additional comments. Nearly half of those responding (45%) affirmed their general satisfaction with Destination BC and/or its programs/services. Another 18% suggested that Destination BC needs to increase the effectiveness of aspects of its marketing. Other comments were varied, with more common categories presented in Table 3-10 below.

Table 3-10 Are there any other additional comments you would like to share?

	% of respondents
Generally satisfied with Destination BC organization/services	45%
Market the province/sector/product more effectively	18%
More assistance/information/training desired	10%
Dissatisfaction with Destination BC	8%
Greater online focus/efforts needed	8%
Greater communication needed	5%
Greater recognition from government desired	3%
Other - unique or general comment	13%
Total	100%

n=241; Individual responses add to greater than 100% due to multiple responses

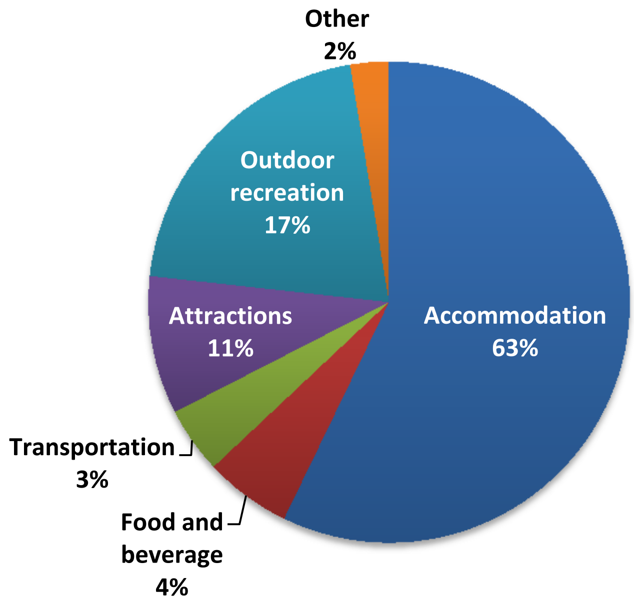
3.6 Demographics and Firmographics

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 directly after Q3 (level of familiarity), while all other respondents completed this section after completing 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 Northern BC had the highest proportion of accommodation businesses, at almost three quarters (72%) of businesses surveyed in this region.

Figure 3-5: Which of the following best describes your organization's type of operation?



n=808

Table 3-11 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	**57%**	58%	53%	54%	72%	57%	63%
Food and beverage	**6%**	5%	3%	15%	0%	1%	2%
Transportation	**4%**	7%	7%	2%	3%	1%	4%
Attractions	**9%**	10%	12%	8%	10%	7%	6%
Outdoor recreation	**21%**	19%	21%	19%	13%	32%	18%
Other	**3%**	2%	3%	2%	3%	2%	8%
Total	**100%**	100%	100%	100%	100%	100%	100%

n=752

Table 3-12 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 highest proportion of businesses having been involved in tourism greater than 30 years.

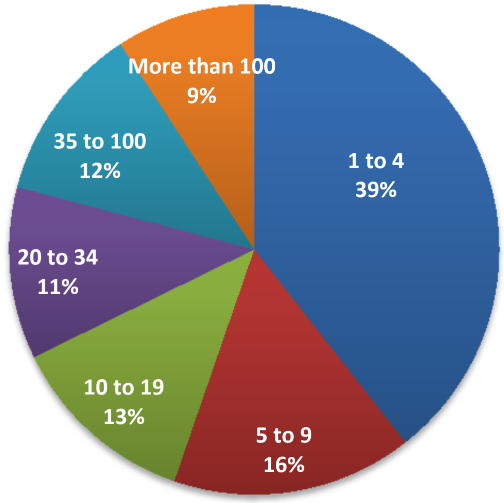
Table 3-12 Years Involved in the Tourism Industry

Response	% of respondents
1 to 5 years	16%
6 to 10 years	15%
11 to 15 years	15%
16 to 20 years	15%
21 to 25 years	10%
26 to 30 years	8%
> 30 years	22%

n=695

Almost seven in ten (68%) tourism businesses have under 20 employees during peak season, with 39% having fewer than five. Less than a tenth (9%) of tourism businesses in BC are large businesses with more than 100 employees at their peak. Figure 3-6 provides the breakdown by industry size.

Figure3-6: How many employees does your organization or branch employ during your peak season?



n=794

SECTION 4: APPENDIX

4.1 Additional Methodological Details

4.1.1 Survey Development

The survey was developed by Destination BC, with input 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 slight revisions proposed by Destination BC. E-mail invitations were also developed in consultation with the Client.

4.1.2 Survey Administration

A soft launch of the survey was undertaken on Monday April 18, 2016 and the full survey administration launch was approved to go ahead on Tuesday April 19 with an e-mail invitation sent to all stakeholders. Four reminder e-mails were sent out during survey administration. The final e-mail invitation was sent on Monday May 9 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. Any inquires requiring the attention of Destination BC were forwarded to the Client. If an out-of-office e-mail 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 e-mailing the Consultant would flag the case as a survey refusal.

Telephone follow-up began on Monday May 2 in an effort to improve the response rates of certain key stakeholder strata and to balance the tourism business response rates by region as best as possible. A total of 5,279 calls were made to 2,546 cases that had not yet been completed on-line. In addition to reminding respondents to complete the survey, thus increasing the on-line completion rate, 153 interviews were completed over the phone. The overall response rate was increased from 17% to 38% (603 additional survey completions) as a result of the extension of the on-line 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).