

SUMMARY REPORT

STAKEHOLDER SATISFACTION RESEARCH 2021

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Prepared for: Destination British Columbia

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Background & Objectives



Background & Objectives

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. It serves a diverse tourism industry in BC. Stakeholders in the industry include: tourism operators, suppliers, media relations representatives, communities, associations, visitor centres, and regional and community destination marketing organizations.

In Spring 2014, Destination BC launched the 2014 Stakeholder Satisfaction Survey, to obtain a baseline measurement of stakeholder views, allowing the organization to assess the fulfillment of its mandate and track changes in performance over time. Since then, the survey has been conducted annually.

Sentis has been administering the survey on behalf of Destination BC since 2018. Note, the 2020 Stakeholder Satisfaction survey (2019–20 fiscal year) was cancelled due to the COVID-19 pandemic to reduce further constraints on stakeholders.

The overarching objective of the survey 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 survey assesses the following key areas:

- Satisfaction with the overall performance of Destination BC
- Performance on delivering corporate mandate
- Stakeholder familiarity and satisfaction with the services and programs provided by Destination BC
- Importance of Destination BC's services and programs
- Stakeholder's perceptions and attitudes towards Destination BC
- Perceived level of collaboration and alignment among industry stakeholders

Methodology





PARTICIPANTS

Destination BC provided Sentis with a contact list of stakeholders from the following stakeholder stratas:

1. Destination Marketing Organizations, which includes region, city and community DMOs
Note: Abbreviated as 'DMO' throughout the report
2. Tourism Industry Associations and Organizations
3. Destination Canada
4. Visitor Centres
5. Tourism Businesses

Note: In 2019 and prior, Destination BC also provided contacts for Travel Trades and Media Relations stakeholders. These were not provided for the 2021 survey due to reduced engagement with select stakeholders as a result of the pandemic.





DATA COLLECTION

The following steps were taken to encourage participation in the survey:



Approximately one week prior to the first email notification, a survey notification email was sent to all stakeholders by the Destination BC CEO.



Courtesy calls were conducted the day after the email invites were sent. The purpose of the courtesy call was to alert stakeholders about the email invitation and to confirm receipt of the email.



Two reminder emails were sent. The first reminder email was sent three days after the initial email invite, and a second reminder email five days after the initial email invite. Reminder emails were sent to non-responders only.



Finally, telephone follow-ups were conducted with non-responders about a week after the survey launch. During the telephone follow-ups, participants were provided with the option to complete a short version of the survey by telephone. (See Appendix A for a copy of the shortened version of the survey administered by phone).





DATA COLLECTION



A total of 4,646 contacts were invited, by email, to participate in the online survey. The online survey was programmed and hosted by Sentis.



Data collection took place from April 22 to May 28, 2021. Participants took 15 minutes to complete on average.



Overall, a total of 965 stakeholders completed the survey, the equivalent of a 21% response rate.

Note: As in previous years, the final data set is comprised of one complete per organization. Where there were completes from multiple individuals from the same organization, the responses from the individual in the most senior role was retained and included in the final data set. The final data set is comprised of 871 completes.



Sentis reviewed the distribution of survey completions by region and stakeholder strata. As the distribution was broadly representative of the population of businesses served by Destination BC was required. No weighting was applied to the data.





REPORTING

Where applicable, performance is reported based on % top 2 box ratings (on a 5-point scale) or % top 4 box ratings (on a 10-point scale), rather than by mean scores. The focus on top 2 or top 4 box ratings is done for the following reasons: (1) Minimal variability in results by mean scores—hence making it difficult to prioritize what’s important or identify strengths/gaps, and (2) Mean scores do not take into account the stakeholders that responded “don’t know/not relevant”, which can be an important piece of information.

Throughout this report, results are shown in total, by strata and by region among tourism business stakeholders. And where applicable, longitudinal results are also provided.



Note:

- In 2019 and prior, Destination Canada’s results are presented together with Travel Trades. Given that Travel Trades were not surveyed this year, Destination Canada’s response (only 1 completed the survey this year) is reported together with DMOs in this year’s report.
- In 2019 and prior, Northern BC and Cariboo Chilcotin Coast regional results are presented separately. Due to smaller base sizes this year, results for these regions are presented together in this year’s report.

Response Rate

The tables below summarize the number of responses and response rate by strata and by region among tourism businesses.

RESPONSE RATES BY STRATA			
Strata	Invited	Total Completes	Response Rate
DMOs	556	66	12%
<i>Regional DMOs</i>	54	5	9%
<i>Community and City DMOs</i>	236	43	18%
<i>Other DMO</i>	266	18	7%
Tourism Businesses	3671	716	20%
Visitor Centres	170	38	22%
Tourism Industry Associations	222	50	23%
Destinations Canada	27	1	4%
Grand Total	4646	871	19%*

*Note: Prior to removing multiple completes per organization, a total of 965 completed surveys were received, the equivalent of a 21% response rate.

TOURISM BUSINESSES RESPONSE RATES BY REGION			
Region	Invited	Total Completes	Response Rate
Vancouver, Coast and Mountains	1222	197	16%
Vancouver Island	823	162	20%
Thompson Okanagan	777	171	22%
Kootenay Rockies	407	96	24%
Northern BC & Cariboo Chilcotin Coast	369	83	22%
Other	73	7	10%
Total	3671	716	20%*

*Note: Prior to removing multiple completes per organization, a total of 765 completed surveys were received, the equivalent of a 24% response rate.

Tourism Business: Firmographics

	Total	TOURISM BUSINESS BY REGION				
		Vancouver Island	Van. Coast & Mountain	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
Base	716	162	197	171	96	83
Sector *Values may not total 100% due to businesses indicating more than one sector category						
Accommodation	50%	47%	42%	46%	61%	71%
Food and beverage	23%	17%	20%	33%	19%	22%
Transportation	8%	10%	11%	6%	5%	4%
Attractions	19%	21%	20%	18%	16%	20%
Outdoor recreation	30%	36%	24%	28%	31%	33%
Other	16%	16%	19%	18%	10%	10%
Years in Operation						
Average (years)	25	25	24	24	26	25
Size (no. of employees)						
1 to 4	35%	38%	24%	35%	39%	54%
5 to 9	14%	17%	11%	14%	15%	17%
10 to 19	15%	14%	13%	20%	13%	13%
20 to 34	11%	12%	12%	8%	13%	7%
35 to 100	11%	9%	16%	11%	13%	5%
More than 100	11%	8%	21%	8%	8%	1%
Unsure/Don't know	2%	1%	3%	4%	1%	2%

Familiarity with Destination BC



Destination BC's Programs & Services



Respondents were asked how familiar they are with the services and programs offered by Destination BC. Respondents who indicated that they are somewhat familiar, familiar or very familiar went on to complete additional questions evaluating their satisfaction with specific programs/services, communication and overall satisfaction. Respondents who indicated that they are not very familiar or not familiar at all were skipped to the firmographics section of the survey as they are not expected to have sufficient knowledge of the organization's activities to respond to the questions in the survey.

OVERALL FAMILIARITY

84%

The majority of Destination BC stakeholders (84%) continue to be at least somewhat familiar with the organization's programs and services.

Specifically, 48% report being familiar or very familiar with Destination BC's programs and services, while 36% report being somewhat familiar.

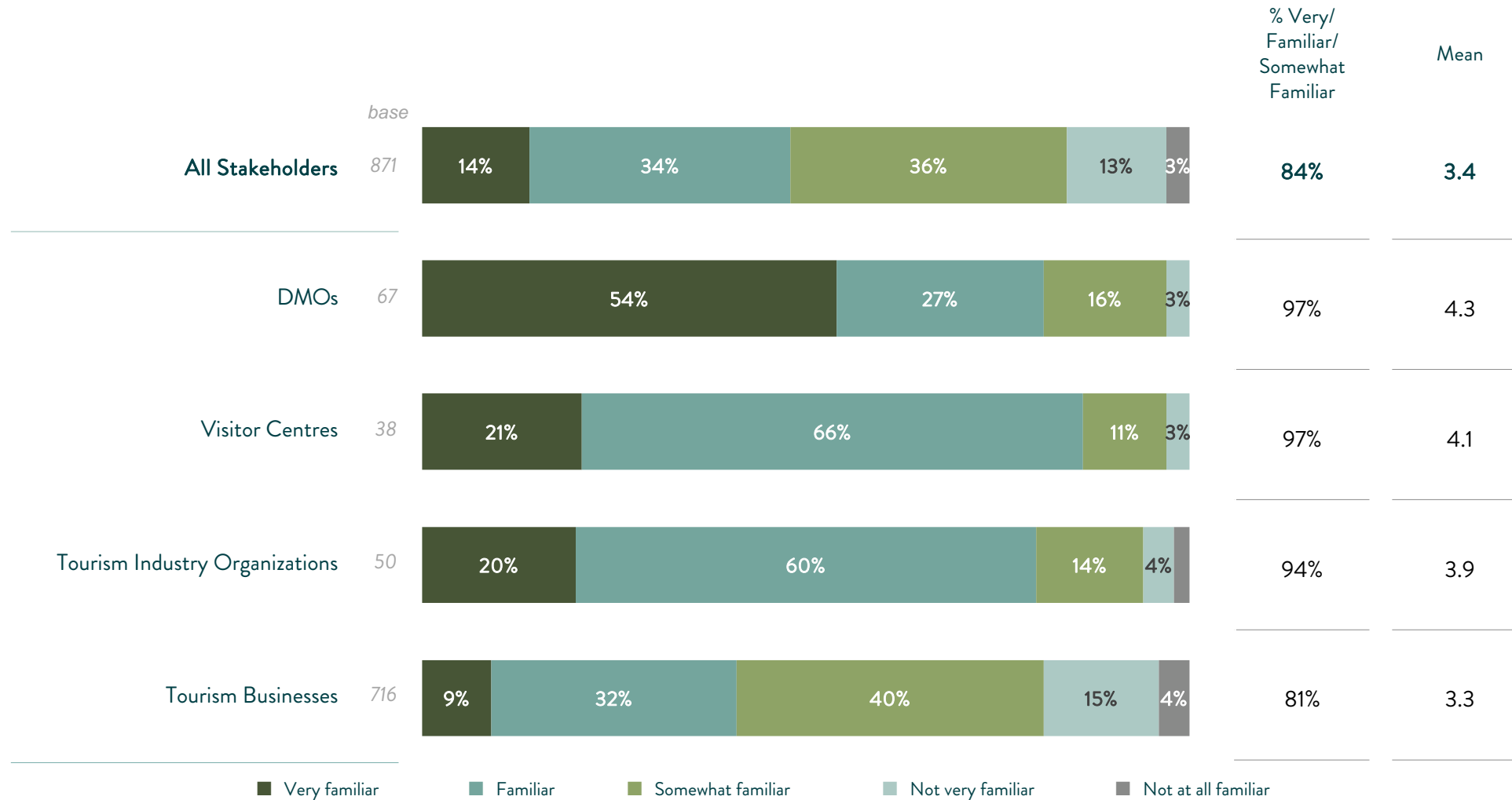
54%

Destination Marketing Organization (or DMO) stakeholders tend to be the most familiar with programs and services offered by Destination BC. Among this group, 54% report being very familiar, 27% familiar and 16% somewhat familiar — totalling to 97% being at least somewhat familiar with Destination BC's offerings.

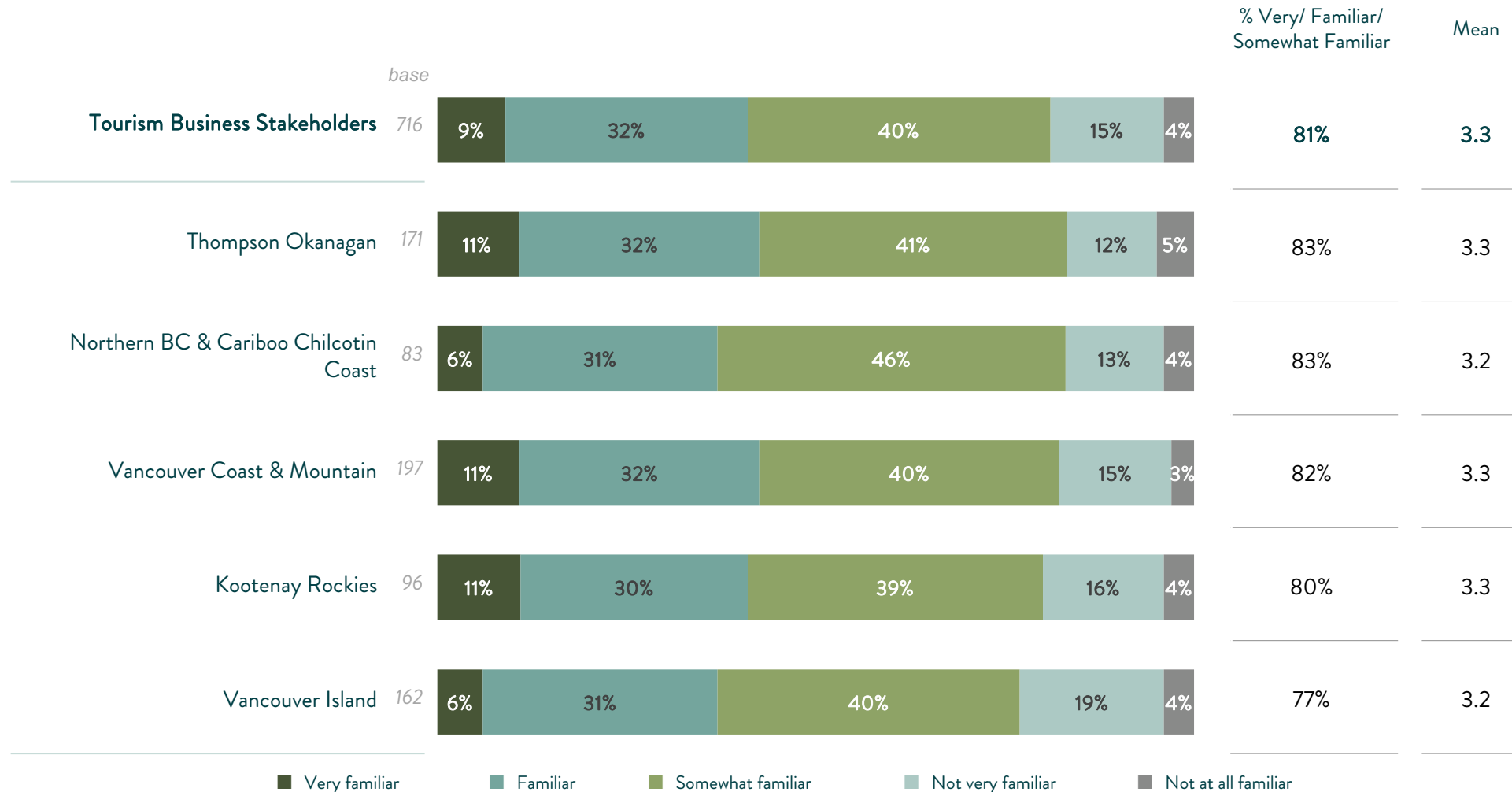
81%

Tourism Business stakeholders remain the least familiar with Destination BC's programs and services; however, 81% report being at least somewhat familiar with them, of which 41% are very familiar or familiar.

Destination BC's Programs and Services: By Strata



Destination BC's Programs and Services: Tourism Business by Region



Destination BC's Programs & Services Longitudinal Comparison

OVERALL FAMILIARITY: LONGITUDINAL COMPARISON

- Familiarity with Destination BC's programs and services (i.e., at least somewhat familiar) among its stakeholders has generally held steady since 2018. The one exception is Tourism Industry Organization stakeholders—familiarity was widespread in 2018 (100%), dropped significantly to 82% in 2019 and is directionally higher this year at 94%.
- Looking specifically at Tourism Businesses, a few regional trends are worth noting:



Stakeholders in the Kootenays Rockies and especially those in the Thompson Okanagan saw dips in familiarity from 2018 to 2019; however, both have returned to 2018 levels this year (80% and 83%, respectively).



Among Vancouver Island stakeholders, familiarity has reverted to 2018 levels (77% currently vs. 86% in 2019).

Destination BC's Programs and Services Longitudinal Comparison

		2018	2019	2021	Point Change in Ratings ('21-'19)
		% Very Familiar/ Familiar/Somewhat Familiar			
All Stakeholders		85%	84%	84%	-
Strata	DMOs	98%	97%	97%	-
	Visitor Centres	95%	97%	97%	-
	Tourism Industry Org.	100%	82%	94%	+12
	Tourism Business	80%	80%	81%	+1
Tourism Business by Region	Thompson Okanagan	82%	73%	83%	+10 ▲
	Northern BC & Cariboo Chilcotin Coast	75%	82%	83%	+1
	Vancouver Coast & Mountain	79%	81%	82%	+
	Kootenay Rockies	82%	77%	80%	+3%
	Vancouver Island	79%	86%	77%	-9 ▼

▲/▼ Statistically significant shift

Results



Results

The intent of the 2021 Stakeholder Satisfaction Study is to assess stakeholder satisfaction with the 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.

(Note: The 2020 Stakeholder Satisfaction survey was cancelled due to the COVID-19 pandemic to reduce further constraints on stakeholders.)

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

Slides 20–26



Overall
satisfaction with
Destination BC

Slides 27–35



Perceptions of and
attitudes towards
Destination BC

Slides 36–42



Impact of
COVID-19 on
Tourism
Businesses

Slides 43–44



Demographics
of stakeholder
organizations

Slides 42

Delivering on Legislative Mandate



DELIVERING ON LEGISLATIVE MANDATE: ALL STAKEHOLDERS

- Assessments of Destination BCs performance in delivering on its legislative mandate ranges between 37% excellent or very good scores to 57% excellent or very good scores.
- Providing industry leadership in tourism marketing, marketing BC as a tourism destination to British Columbians and enhancing public awareness of tourism and its importance to the province stand out as areas where stakeholders acknowledge Destination BC is performing particularly well.
- The exception to Destination BC's overall positive performance is providing support for visitor services and centres — 37% give high ratings of excellent or very good currently. These less positive assessments stem in part from having a significant proportion (36%) of stakeholders who are unable to provide a rating, suggesting that more effort is needed from Destination BC to inform stakeholders about the resources and support that are available.
- Another area where a sizable proportion of stakeholders (26%) are unable to provide an assessment (again indicating a need for more information) is providing quality training and development programs.



Delivering on Legislative Mandate

DELIVERING ON LEGISLATIVE MANDATE: BY STRATA

- Visitor Centre stakeholders give Destination BC its most positive ratings among all strata when it comes to meeting its legislative mandate. Three-quarters or more give the organization very good or excellent ratings in six of the nine areas (the other three areas were not evaluated by this strata).
 - Notably, Visitor Centre stakeholders are particularly positive about the support that's provided by Destination BC to support them, as well as the organization's efforts in enhancing the public's awareness of tourism and its importance to the province.
- DMO stakeholders also tend to give more positive ratings compared to most other strata groups. They are particularly positive about Destination BC's performance when it comes to providing industry leadership in tourism marketing, providing training and development programs and providing support for community and tourism sector programs.

- Of the remaining two strata — Tourism Businesses and Tourism Industry Organizations — the latter tends to be more positive in its assessments of Destination BC's performance, but not to the level of Visitor Centres and DMOs. Tourism Industry Organization stakeholders give Destination BC its strongest ratings on providing industry leadership in tourism marketing, providing quality training and development programs and providing support for community tourism programs.

Tourism Business stakeholders tend to give lower ratings compared to other strata groups. This group gives the most positive assessments to Destination BC for marketing the province as a tourism destination to British Columbians and enhancing public awareness of tourism and its importance to the province. The biggest discrepancies between the ratings given by Tourism Business stakeholders and the other stakeholder groups are in the following areas — providing quality training and development programs and providing support for visitor services and centres.



Delivering on Legislative Mandate

DELIVERING ON LEGISLATIVE MANDATE: LONGITUDINAL COMPARISON

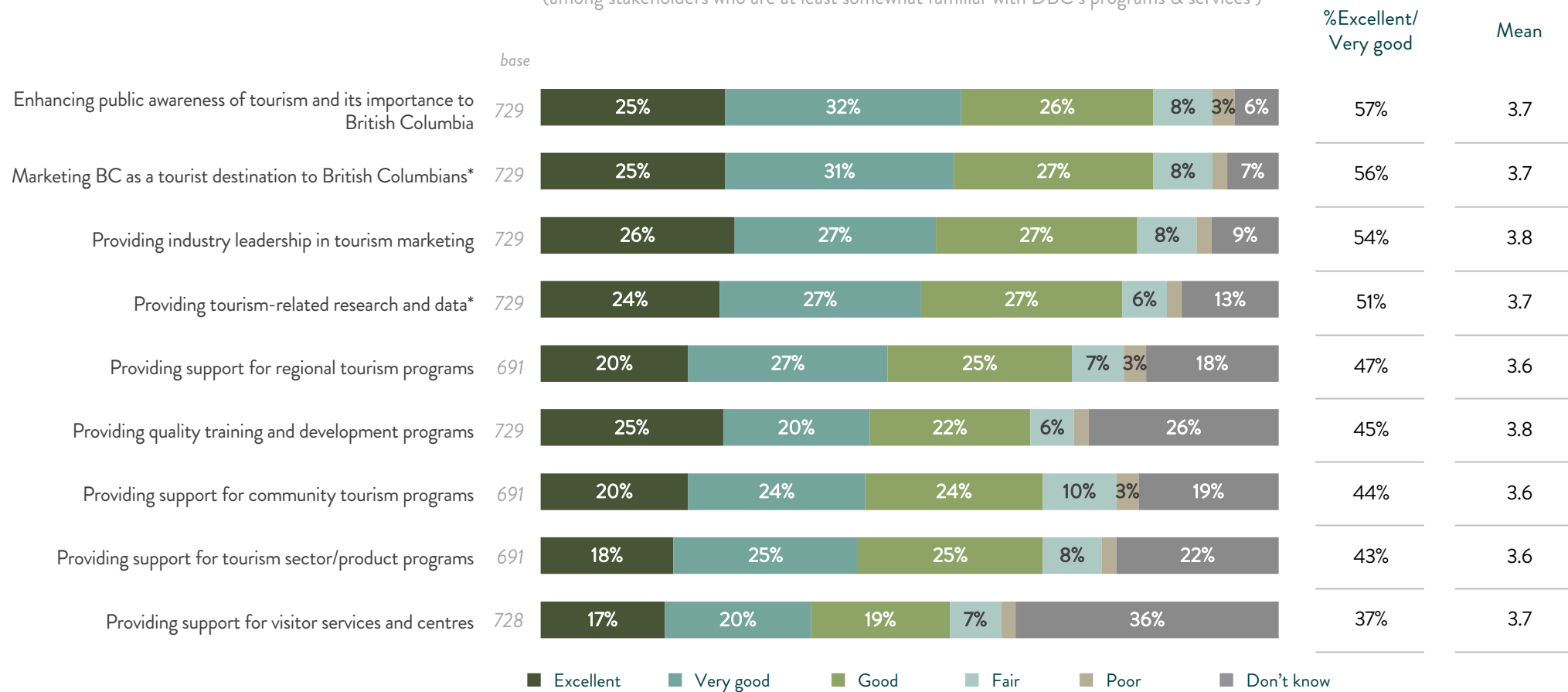
- Compared to two years ago, assessments on how well Destination BC delivered on two mandate items — providing quality training and development programs and providing support for community tourism programs — have improved. Conversely, positive assessments have fallen in terms of supporting visitor services and centres.



Delivering on Legislative Mandate

TOTAL 2021

(among stakeholders who are at least somewhat familiar with DBC's programs & services)



*New questions added this year
 Q4. Over the past year (April 2020 to march 2021) how would you rate Destination BC's performance on each of the following?



Delivering on Legislative Mandate: by Strata

% EXCELLENT / VERY GOOD

(among stakeholders at least somewhat familiar with DBC's programs & services)

	Total	BY STRATA			
		Tourism Businesses	Visitor Centres	DMOs	Tourism Ind. Org.
Base	691-729	580	37	65	47
Enhancing public awareness of tourism and its importance to British Columbia	57%	53%	89%	72%	60%
Marketing BC as a tourist destination to British Columbians*	56%	53%	76%	69%	55%
Providing industry leadership in tourism marketing	54%	49%	76%	78%	68%
Providing tourism-related research and data*	51%	46%	76%	71%	60%
Providing support for regional tourism programs	47%	43%	n/a	69%	60%
Providing quality training and development programs	45%	38%	76%	74%	64%
Providing support for community tourism programs	44%	40%	n/a	73%	64%
Providing support for tourism sector/product programs	43%	38%	n/a	73%	62%
Providing support for visitor services and centres	37%	31%	81%	52%	53%



Delivering on Legislative Mandate: by Strata

MEAN SCORES

(among stakeholders at least somewhat familiar with DBC's programs & services)

	Total	BY STRATA			
		Tourism Businesses	Visitor Centres	DMOs	Tourism Ind. Org.
<i>Base</i>	691-729	580	37	65	47
Providing industry leadership in tourism marketing	3.8	3.7	4.3	4.2	3.8
Providing quality training and development programs	3.8	3.7	4.3	4.2	3.9
Marketing BC as a tourist destination to British Columbians*	3.7	3.7	4.3	4.0	3.7
Enhancing public awareness of tourism and its importance to British Columbia	3.7	3.7	4.5	4.0	3.7
Providing support for visitor services and centres	3.7	3.5	4.4	4.0	3.9
Providing tourism-related research and data*	3.7	3.7	4.3	4.0	3.8
Providing support for regional tourism programs	3.6	3.6	n/a	4.0	3.7
Providing support for community tourism programs	3.6	3.5	n/a	4.3	3.9
Providing support for tourism sector/product programs	3.6	3.6	n/a	4.1	3.8



*New questions added this year; **caution: small base size

Q4. Over the past year (April 2020 to March 2021) how would you rate Destination BC's performance on each of the following?

Delivering on Legislative Mandate: Longitudinal Comparison



	2018 Total		2019 Total		2021 Total		% Change in Mean ('21-'19)	Point Change in Exc./V.gd. Ratings ('21-'19)
	Mean	% Rating Exc./ V.Gd.	Mean	% Rating Exc./ V.Gd.	Mean	% Rating Exc./ V.Gd.		
Enhancing public awareness of tourism and its importance ¹ to British Columbia	3.7	55%	3.7	54%	3.7	57%	-	+3
Marketing BC as a tourist destination to British Columbians*	n/a	n/a	n/a	n/a	3.7	56%	n/a	n/a
Providing industry leadership in tourism marketing	3.9	58%	3.8	54%	3.8	54%	-	-
Providing tourism-related research and data*	n/a	n/a	n/a	n/a	3.7	51%	n/a	n/a
Providing support for regional tourism programs	3.7	45%	3.6	41%	3.6	47%	-	+6▲
Providing quality training and development programs	3.6	40%	3.6	40%	3.8	45%	+6%	+5▲
Providing support for community tourism programs	3.6	48%	3.6	44%	3.6	44%	-	-
Providing support for tourism sector/product programs	3.7	46%	3.6	43%	3.6	43%	-	-
Providing support for visitor services and centres	3.7	42%	3.6	43%	3.7	37%	+3%	-6▼

(among stakeholders who are at least somewhat familiar with DBC's programs & services)

▲/▼ Statistically significant shift

*New questions added this year

¹in 2019, question was worded as enhancing public awareness of tourism and its economic value to British Columbia

Q4. Over the past year (April 2020 to March 2021) how would you rate destination BC's performance on each of the following?

Overall Satisfaction with Destination BC

Stakeholders who are at least somewhat familiar with Destination BC's programs and services rated Destination BC's overall performance on a scale of 1 to 10, where 1 means 'Poor' and 10 means 'Excellent'.

80%

Destination BC stakeholders continue to be satisfied with the organization's performance, with 80% awarding ratings of 7 or higher out of 10 and a mean score of 7.6 out of 10.

70%+

By strata, satisfaction ratings range from a high of 95% awarding ratings of 7 or higher among Visitor Centre stakeholders to a low of 78% among Tourism Business stakeholders.

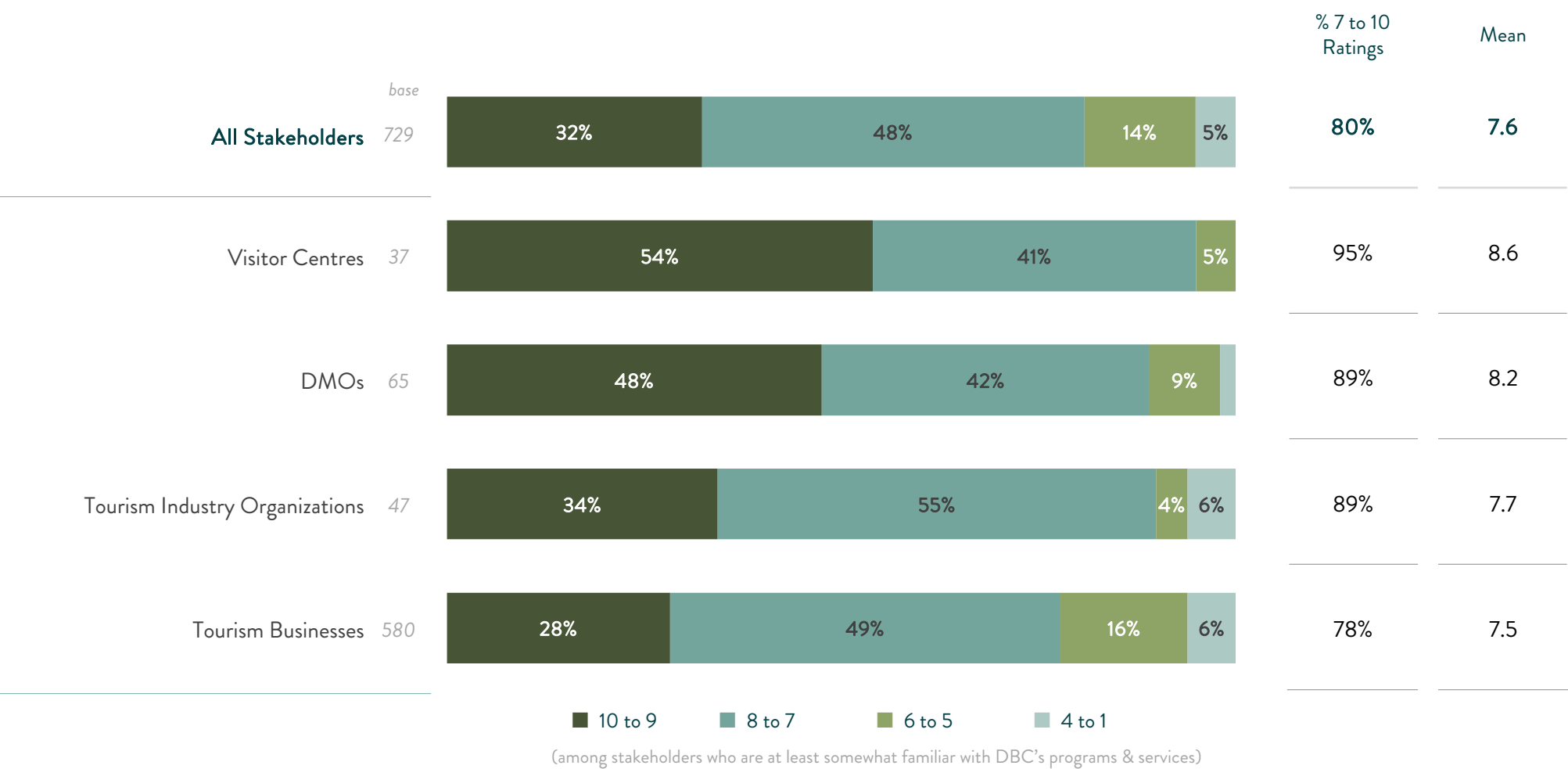
- Nine-in-ten DMO stakeholders and Tourism Industry Organization stakeholders give ratings of 7 or higher; however, DMO stakeholders tend to be more positive, with nearly half (48%) giving ratings of 9 or 10 out of 10 vs. only 34% among Tourism Industry Organization stakeholders.

70%+

Regionally, Tourism Business stakeholders in the Northern BC & Cariboo Chilcotin Coast and Vancouver Coast & Mountain regions tend to be the most positive about Destination BC's performance (83% and 81%, respectively, giving ratings of 7 or higher) whereas Tourism Business stakeholders on Vancouver Island are relatively less positive (72%).

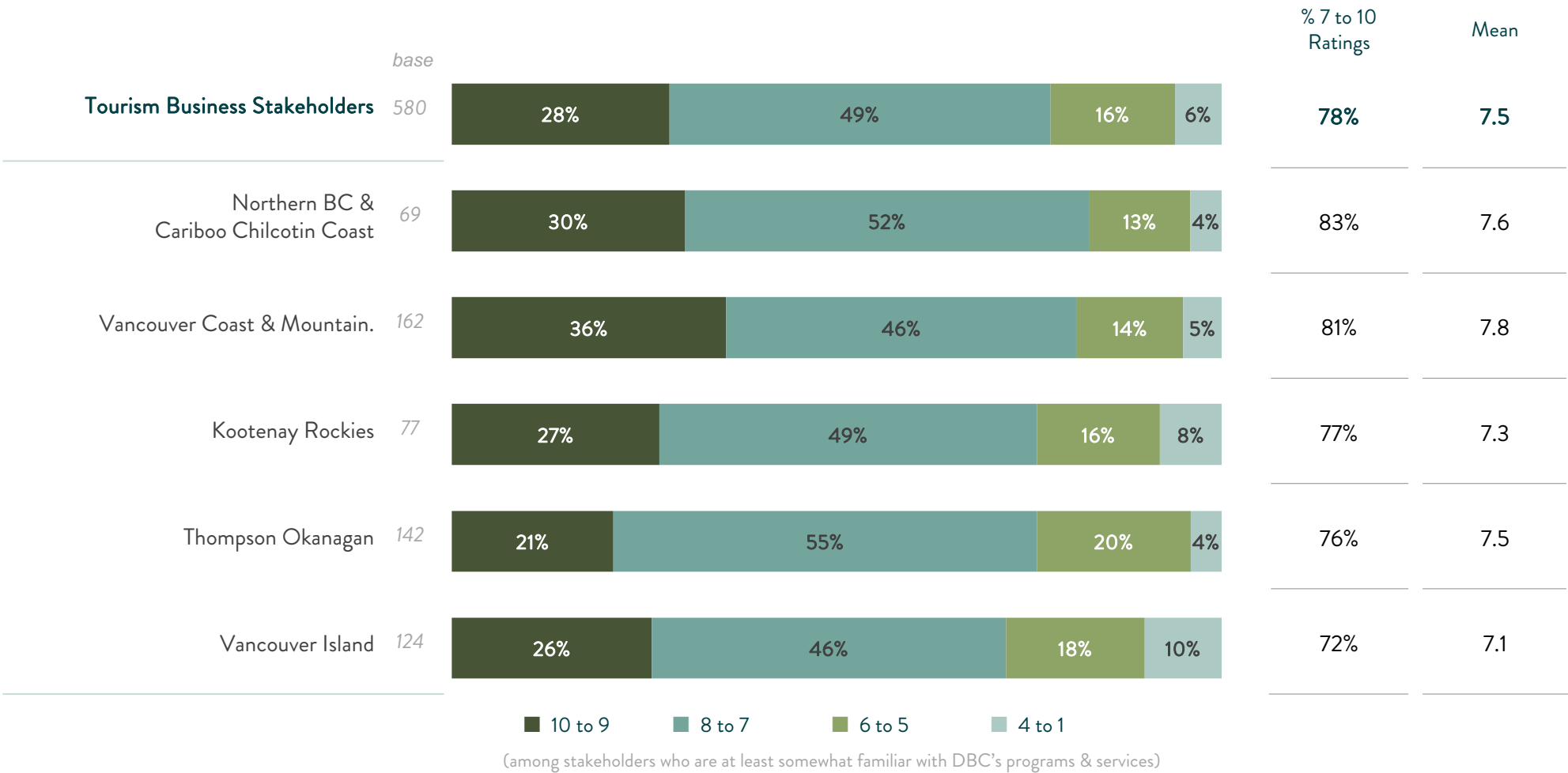


Overall Satisfaction with Destination BC: By Strata



*Caution: small base size.
Note: In 2021, stakeholders were asked to rate their overall satisfaction with Destination BC toward the end of the survey, instead of at the beginning.
Q12. On a scale of 1 to 10, where 1 means ‘Poor’ and 10 means ‘Excellent’, please provide your rating for the following: Overall performance of Destination BC.

Overall Satisfaction with Destination BC: Tourism Business by Region



*Caution: small base size
 Note: In 2021, stakeholders were asked to rate their overall satisfaction with Destination BC toward the end of the survey, instead of at the beginning.
 Q12. On a scale of 1 to 10, where 1 means 'Poor' and 10 means 'Excellent', please provide your rating for the following: Overall performance of Destination BC.

Overall Satisfaction with Destination BC Longitudinal Comparison



Satisfaction with Destination BC's overall performance has remained fairly steady since 2018.

The proportion of stakeholders giving ratings of 7 or higher has gone from 81% in 2018 to 77% in 2019 to 80% currently.

Average scores have moved from 7.7 in 2018 to 7.5 in 2019 to 7.6 currently.

Hazelton

Among DMO and Tourism Industry Organization stakeholders, satisfaction with Destination BC performance is directionally more positive this year, with 89% of both groups posting overall satisfaction ratings of 7 or higher (versus 82% to 83%, respectively, in 2019).

Meritt

Visitor Centre stakeholders' evaluations of Destination BC overall performance have remained highly positive and relatively steady since 2018, with those giving ratings of 7 standing at 95% currently (versus 95% in 2018 and 91% in 2019).

Exchamsiks River Provincial Park

Tourism Business stakeholders' satisfaction with Destination BC performance is currently the lowest of all the strata; however, ratings are more positive in 2021—78% award ratings of 7 or higher, up from 70% in 2019.

Vancouver Island

Among Tourism Business stakeholders, those in the Northern BC & Cariboo Chilcotin Coast and Kootenay Rockies regions are significantly more satisfied with Destination BC's performance than they were two years ago (ratings of 7 or higher moving from 67% to 83% for the former and from 60% to 77% for the latter).

Okanagan Lake

Tourism Business stakeholders in the Thompson Okanagan are also more satisfied with Destination BC's performance compared to 2019; however, improvements are directional rather than statistically significant (ratings of 7 or higher moving from 66% in 2019 to 76% in 2021).

Terrace

Overall Satisfaction with Destination BC

LONGITUDINAL COMPARISON: BY STRATA

(among stakeholders at least somewhat familiar with DBC's programs & services)

		2018		2019		2021		% Change in Mean ('21 - '19)	Point Change in Ratings ('21 - '19)
		Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10		
All Stakeholders		7.7	81%	7.5	77%	7.6	80%	+1%	+3
By Strata	Visitor Centres	8.2	95%	8.1	91%	8.6	95%	+6%	+4
	DMOs	7.6	83%	7.4	82%	8.2	89%	+11%	+7
	Tourism Industry Organizations	7.8	83%	7.9	83%	7.7	89%	-3%	+6
	Tourism Businesses	7.3	75%	7.2	70%	7.5	78%	+4%	+8 ▲

▲/▼ Statistically significant shift

Note: In 2021, stakeholders were asked to rate their overall satisfaction with Destination BC toward the end of the survey, instead of at the beginning.
Q12. On a scale of 1 to 10, where 1 means 'Poor' and 10 means 'Excellent', please provide your rating for the following: Overall performance of Destination BC.



Overall Satisfaction with Destination BC



LONGITUDINAL COMPARISON: BY TOURISM BUSINESS REGIONS

(among stakeholders at least somewhat familiar with DBC’s programs & services)

		2018		2019		2021		% Change in Mean ('21 - '19)	Point Change in Ratings ('21 - '19)
		Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10		
All Stakeholders		7.7	81%	7.5	77%	7.6	80%	+1%	+3
Tourism Business by Region	Northern BC & Cariboo Chilcotin Coast	7.0	67%	7.0	67%	7.6	83%	+9%	+16▲
	Vancouver Coast & Mountain	7.5	78%	7.7	79%	7.8	81%	+1%	+2
	Kootenay Rockies	7.2	72%	7.0	60%	7.3	77%	+4%	+17▲
	Thompson Okanagan	7.5	83%	7.0	66%	7.5	76%	+7%	+10
	Vancouver Island	7.3	72%	7.1	73%	7.1	72%	-	-1

▲ / ▼ Statistically significant shift

Note: In 2021, stakeholders were asked to rate their overall satisfaction with Destination BC toward the end of the survey, instead of at the beginning.
 Q12. On a scale of 1 to 10, where 1 means ‘Poor’ and 10 means ‘Excellent’, please provide your rating for the following: Overall performance of Destination BC.



Suggestions to Improve Destination BC's Performance

Lesser-known Communities

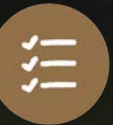
Among stakeholders who provided suggestions to improve Destination BC's performance (85% did so), the top comment is to focus more on smaller / lesser-known communities and regions (10% mentioning). This is followed by providing more marketing and advertising, engaging and working with stakeholders and increasing the focus on small businesses (8% mentioning each).

Cariboo-Chilcotin and the North

Visitor Centre stakeholders are the most likely to mention increasing the focus on other communities and regions (27% mentioning versus 10% overall). While only 8% of Tourism Business stakeholders make this suggestion, stakeholders in Northern BC & Cariboo Chilcotin Coast are the most vocal about this (23% among Tourism Business stakeholders in these regions would like to see increased focus in this area).

Increase Marketing

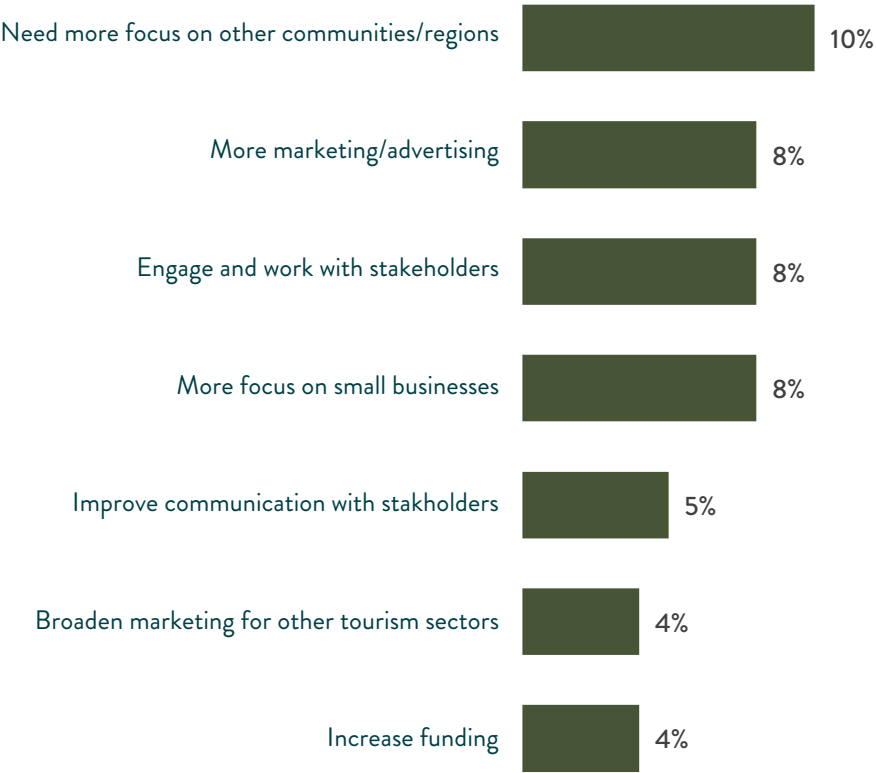
Tourism Industry Organization stakeholders are the most likely to suggest that Destination BC increase its marketing and advertising efforts and engage with stakeholders more (15% mentioning each versus 8% overall).



Suggestions to Improve Destination BC's Performance



North Vancouver



(Among stakeholders who rated overall performance 8 or less and provided a comment)

Suggestions to Improve Destination BC's Performance

EXAMPLE COMMENTS

“Drill down away from the big attractions into different communities and unique experiences folks don’t know about.”

“Be more present and interested in communities that are not in the Lower Mainland, specifically Northern BC and their small businesses. Every time I see an ad or promotion, it’s always about Whistler, Banff, Vancouver and Vancouver Island. Every marketing agency always promote Areas of BC, and that is done 100 times more by everyone else in that business area. Nobody really promotes all the other thousands of square kilometers in BC. I would hope that that will be recognized after the pandemic.”

“Focus on marketing. Leave destination development to the communities that understand what they need. Work better with other organizations within the tourism industry as partners rather than trying to act as a parent does to a child.”

“I just want to see stronger more enticing advertising for the Province and the regions within it.”

“Listen to industry first and develop programs and campaigns second after being informed as to what people need during tough times.”

“More collaboration with smaller tourism operators. More one-on-one communication with smaller tourism operators.”

“Ensure they are working with the regional and city DMOs to understand the on-the-ground issues and challenges. Having humility to self reflect and change — admit that just because something is a slick new idea doesn't mean it is the right idea for the province.”



Perceptions & Attitudes



Stakeholders rated the extent to which they agree or disagree that Destination BC possesses each of 12 attributes that reflect key aspects of organizational competence. These attributes tap perceptions of Destination BC's strategy and direction, its employees, its relationship with stakeholders, and the extent to which Destination BC is transparent about its performance.

Perceptions & Attitudes: Overall

- Stakeholders generally hold highly positive impressions of Destination BC with the organization's employees being a clear area of strength — 80% agree that Destination BC's employees are respectful and 74% agree that employees are knowledgeable about market changes and issues impacting tourism. Stakeholders also tend to widely agree that the organization provides leadership and direction to the BC tourism industry (84% agree).
- One area where Destination BC has the most room to improve is understanding stakeholders' business/organizational needs — a relatively smaller proportion of stakeholders (60%) agree that the organization understands their needs.
- Although two other attributes also garnered lower levels of agreement, what stands out is that the lower ratings stem in part from having a sizable proportion of stakeholders who were not able to offer an assessment.
 - While nearly six-in-ten stakeholders agree that Destination BC is transparent about its corporate performance and spends funds wisely, another three-in-ten do not feel informed enough to offer an opinion.



Perceptions & Attitudes: by Strata



- Visitor Centre stakeholders tend to hold the most positive perceptions of Destination BC among all four strata groups.
 - This group of stakeholders has very positive impressions of Destination BC employees, with a strong majority agreeing that employees are knowledgeable and respectful.
 - Compared to other stakeholders, this group is particularly positive about Destination BC spending funds wisely and responsibly, understanding its (Visitor Centres') business/organizational needs, and addressing questions/concerns in an effective and timely manner.
 - Visitor Centre stakeholders are not as positive about Destination BC's transparency with corporate performance—74% agree that Destination BC is being transparent, leaving this as an area with the most room to improve.



Perceptions & Attitudes: by Strata

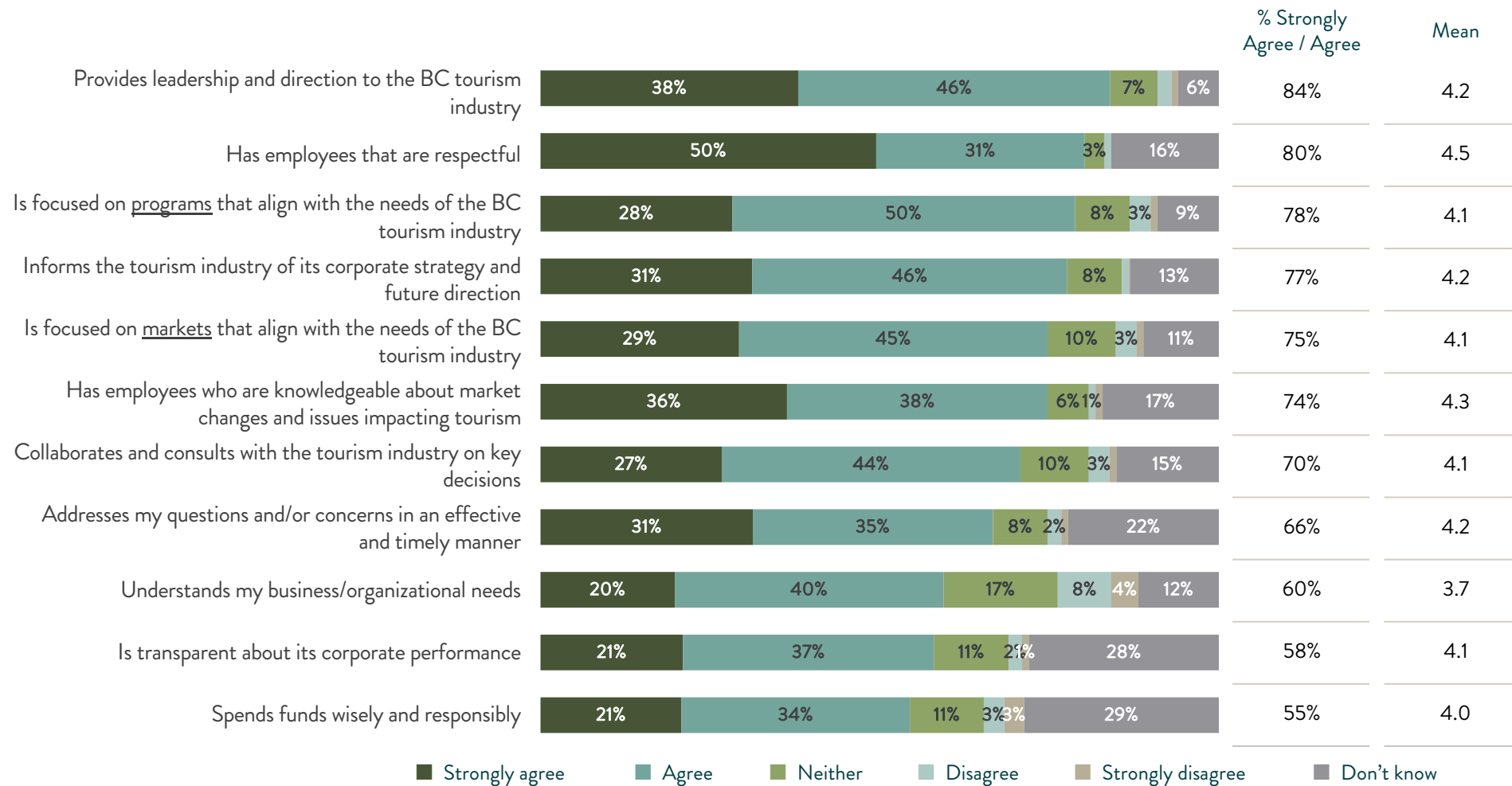


Tweedsmuir Provincial Park

- DMO stakeholders also hold highly positive impressions of Destination BC. Similar to Visitor Centre stakeholders, DMO stakeholders are particularly positive about Destination BC's understanding of its business/organizational needs and addressing questions/concerns in an effective and timely manner. They also have high regards for Destination BC employees. Where they see the most room for improvement is on spending funds wisely and responsibly.
- Tourism Industry Organization stakeholders also hold above-average positive impressions of Destination BC, but they are generally not as positive as DMO or Visitor Centre stakeholders.
 - Their perceptions of Destination BC are less positive compared to DMO or Visitor stakeholders in several areas, namely Destination BC addressing question of concerns in an effective and timely manner, understanding their business/organizational needs, informing the tourism industry of its corporate strategy and future direction, and being focused on markets that align with the needs of the BC tourism industry.
- Tourism Business stakeholders have less positive perceptions of Destination BC across most attributes. Three areas in which perceptions of Destination BC are particularly low among this group of stakeholders are: addressing questions or concerns in an effective and timely manner, understanding business/organization needs, and spending funds wisely and responsibly.



Perceptions & Attitudes: Overall



Base: 543

(among stakeholders who are at least somewhat familiar with DBC's programs & services)

Q10. Please indicate how much you agree with the following statements? Destination BC...

Perceptions & Attitudes: by Strata and by Region

% STRONGLY AGREE / AGREE

(among stakeholders at least somewhat familiar with DBC's programs & services)

	Total	STRATA			
		Tourism Businesses	Visitor Centres	DMOs	Tourism Ind. Org.
Base	543	417	35	52	39
Provides leadership and direction to the BC tourism industry	84%	81%	100%	92%	90%
Has employees that are respectful	80%	76%	94%	100%	95%
Is focused on <u>programs</u> that align with the needs of the BC tourism industry	78%	75%	100%	81%	87%
Informs the tourism industry of its corporate strategy and future direction	77%	72%	97%	96%	82%
Is focused on <u>markets</u> that align with the needs of the BC tourism industry	75%	71%	94%	88%	79%
Has employees who are knowledgeable about market changes and issues impacting tourism	74%	69%	94%	92%	90%
Collaborates and consults with the tourism industry on key decisions	70%	66%	86%	83%	79%
Addresses my questions and/or concerns in an effective and timely manner	66%	59%	91%	94%	85%
Understands my business/organizational needs	60%	53%	89%	85%	74%
Is transparent about its corporate performance	58%	53%	74%	79%	77%
Spends funds wisely and responsibly	55%	48%	89%	75%	72%



Perceptions & Attitudes: Longitudinal Comparison

- Stakeholder perceptions of and attitudes toward Destination BC are generally in line with historical trends. Stakeholders note improvement in two areas since last measured in 2019: Providing leadership and direction to the BC tourism industry (78% agreeing in 2019 versus 84% currently) and collaborating and consulting with the tourism industry on key decisions (63% in 2019 versus 70% currently).
- While employees continue to be a strength for Destination BC, ratings of employees in terms of being respectful and knowledgeable about market changes and issues impacting tourism have fallen since 2019 (agreement ratings moving from 85% to 80% for the former and 80% to 74% for the latter).



Perceptions & Attitudes: Longitudinal Comparison

LONGITUDINAL COMPARISON

(among stakeholders at least somewhat familiar with DBC's programs & services)

- Provides leadership and direction to the BC tourism industry
- Has employees that are respectful
- Is focused on programs that align with the needs of the BC tourism industry
- Informs the tourism industry of its corporate strategy and future direction
- Is focused on markets that align with the needs of the BC tourism industry
- Has employees who are knowledgeable about market changes and issues impacting tourism
- Collaborates and consults with the tourism industry on key decisions
- Addresses my questions and/or concerns in an effective and timely manner
- Understands my business/organizational needs
- Is transparent about its corporate performance
- Spends funds wisely and responsibly

2018		2019		2021	
Mean	% Rating 4 or 5	Mean	% Rating 4 or 5	Mean	% Rating 4 or 5
4.2	82%	4.2	78%	4.2	84%
4.6	87%	4.6	85%	4.5	80%
4.2	80%	4.1	75%	4.1	78%
4.1	73%	4.2	74%	4.2	77%
4.2	81%	4.1	74%	4.1	75%
4.4	80%	4.4	80%	4.3	74%
4.0	65%	4.0	63%	4.1	70%
4.2	73%	4.2	69%	4.2	66%
3.9	66%	3.8	62%	3.7	60%
4.1	59%	4.1	59%	4.1	58%
4.1	54%	4.0	51%	4.0	55%

% Change in Mean ('21-'19)	Point Change in Ratings ('21-'19)
-	+6▲
-2%	-5▼
-	+3
-	+3
-	+1
-2%	-6▼
+2%	+7▲
-	-3
-3%	-2
-	-1
-	+4

▲/▼ Statistically significant shift

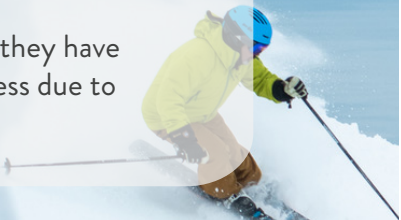


Impact of COVID-19 On Tourism Businesses

The main impact of COVID-19 on Tourism Business stakeholders has been a reduction in staff and temporary closures. Overall, 78% of Tourism Business stakeholders have either reduced staff or had to close temporarily.

Tourism Business stakeholders in the Vancouver Coast & Mountain region are the most likely to report having to reduce staff (65% reporting they did). In comparison, those on Vancouver Island are most likely to report having to close temporarily (62%).

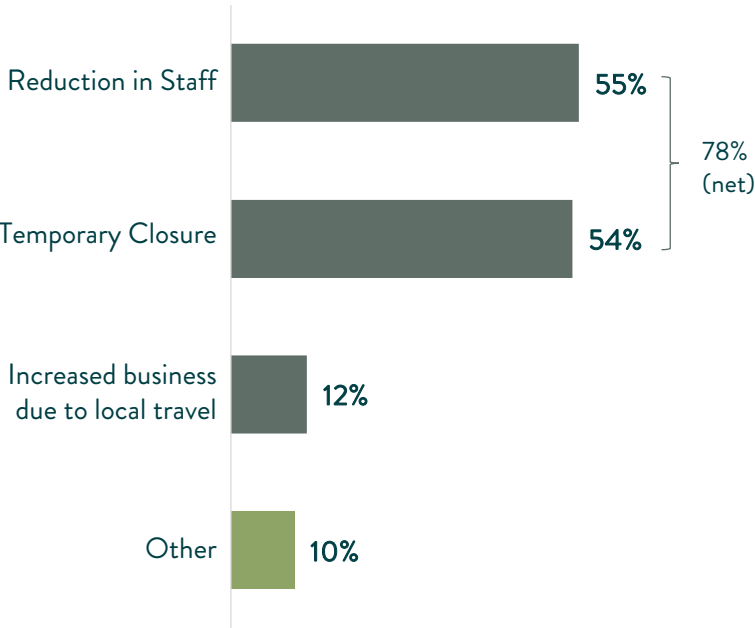
Meanwhile, 12% say they have seen *increased* business due to local travel.



Mount Washington

IMPACT OF COVID-19 ON TOURISM BUSINESSES

Only mentions of 3% or more are shown.



Region				
Vancouver Island	Van. Coast & Mountain	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
162	197	171	96	83
51%	65%	53%	51%	46%
62%	57%	49%	52%	43%
10%	11%	17%	10%	12%
8%	6%	12%	19%	7%



Note: 2% of Tourism Business stakeholders say that their business was not impacted by COVID-19.
Base: 716
Q17. What impact(s) has the COVID-19 pandemic had on your business? Select all that apply.

Impact of COVID-19 On Revenues

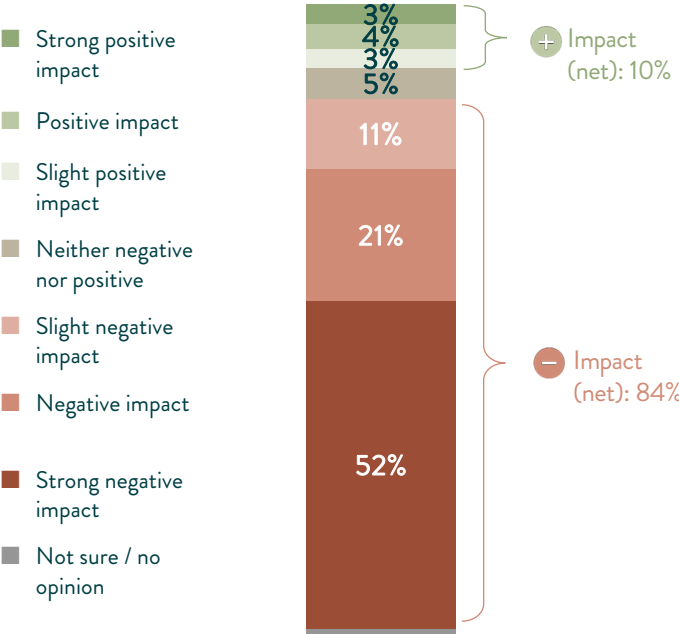
The net effect of COVID-19 on the revenues of Tourism Business stakeholders has generally been negative. Specifically, 84% report that the impact has been negative, while only 10% say the pandemic positively impacted their revenues.

Further, among the 84% of Tourism Business stakeholders that have been negatively impacted, 52% state COVID-19 has had a strong negative impact on their revenues.

The negative impact is apparent across all regions but is particularly strong in the Vancouver Coast & Mountains region where 66% state it has had a strong negative impact.

Meanwhile, Tourism Business stakeholders in the Thompson Okanagan region are the most likely to say the impact has been positive (16%).

IMPACT OF COVID-19 ON REVENUES



Net Positive Impact – by Region				
Vancouver Island	Van. Coast & Mountain	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
162	197	171	96	83
7%	6%	16%	8%	12%

Net Negative Impact – by Region				
Vancouver Island	Van. Coast & Mountain	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
162	197	171	96	83
88%	87%	76%	85%	82%

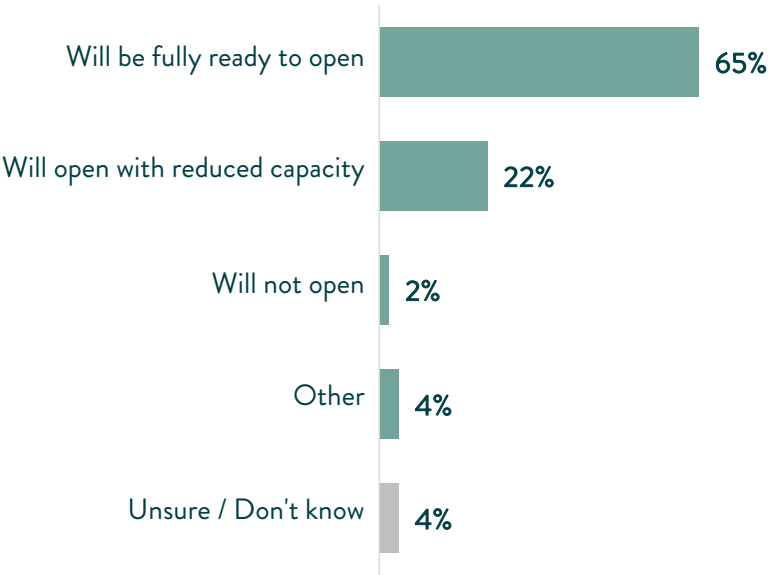


Preparedness For Next Peak Season

Two-thirds of Tourism Business stakeholders say they will be fully ready to open during the next peak season. Another one-fifth anticipate reopening with reduced capacity.

Tourism Business stakeholders in Northern BC & Cariboo Chilcotin Coast and the Thompson Okanagan regions are the most likely to be fully ready to open (71% each). Meanwhile, those in the Kootenay Rockies are the most likely to open at reduced capacity (26%).

PREPAREDNESS FOR NEXT PEAK SEASON



Region				
Vancouver Island	Van. Coast & Mountain	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
162	197	171	96	83
60%	63%	71%	64%	71%
27%	22%	19%	26%	13%
2%	2%	2%	1%	1%
4%	5%	4%	5%	5%
5%	5%	2%	3%	5%





Laxgalts'ap, Nisga'a Nation



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