

DESTINATION BC INDUSTRY PARTNERS SURVEY 2022



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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. Survey respondents in the industry include: tourism operators, suppliers, media relations representatives, communities, associations, visitor centres, and regional and community destination management organizations.

In Spring 2014, Destination BC launched the Stakeholder Satisfaction Survey, now called the Industry Partners Survey, to obtain a baseline measurement of partners' 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 Research has been administering the survey on behalf of Destination BC since 2018. (In 2020, the survey was cancelled due to the COVID-19 pandemic).

The overall goal of the survey is to assess industry satisfaction with services provided by Destination BC and to identify how it can continue to effectively support BC's tourism industry. The survey assesses the following:

- Familiarity with Destination BC's programs and services
- Overall satisfaction with Destination BC
- Destination BC's performance in delivering on the core areas of its mandate
- Destination BC performance in areas that fall outside the core area of its mandate, but which promote a strong tourism industry in BC



PARTICIPANTS



Destination BC provided Sentis with a contact list of industry groups from the following strata:
Destination Management Organizations

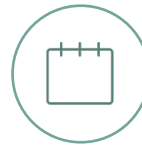
Note: Abbreviated as 'DMO' throughout the report

1. Tourism Industry Associations and Organizations
2. Visitor Centres/Travel Trade
3. Tourism Businesses

Note: In 2019 and prior, Destination BC also provided contacts for Travel Trade and Media Relations partners. These were not provided for the 2021 survey due to reduced engagement with select groups as a result of the pandemic. In 2022, contacts for Travel Trade and Visitor Centres were categorized as one strata.

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 potential respondents by Destination BC's CEO.



Two reminder emails were sent. The first reminder email was sent by Destination BC seven days after the initial email invite, and a second reminder email fourteen days after the initial email invite. Reminder emails were sent to non-responders only.



Telephone follow-ups were initiated with non-responders about ten days after the survey launch and continued for three weeks. During the telephone follow-ups, participants were provided with the option to complete a short version of the survey by telephone. (See Appendix for a copy of the shortened version of the survey administered by phone).



SURVEY STATS



A total of 4,990 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 May 2 to June 8, 2022. Respondents took an average of 15 minutes to complete the survey.



Overall, a total of 951 respondents completed the survey, the equivalent of a 20% 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 882 completes.



Sentis reviewed the distribution of survey completions by region and strata. As the distribution was broadly representative of the population of businesses served by Destination BC, no weighting was required.

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) There is 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 respondents that indicated "don't know", which can be an important piece of information.

Throughout this report, results are shown for the total sample, and in some cases by strata and region. Where applicable, longitudinal results are also provided.

Note:

- In 2019 and prior, Northern BC and Cariboo Chilcotin Coast regional results were presented separately. Due to smaller base sizes, results for these regions have been presented together since 2021.



Response Rates

The tables below summarize the response rate by strata and by region among tourism businesses prior to removing multiple completes per organization.

RESPONSE RATES BY STRATA			
Strata	Invited	Total Completes	Response Rate
DMOs	345	83	24%
Tourism Businesses	4,010	710	19%
Visitor Centres/Travel Trade	141	60	43%
Tourism Industry Associations	494	98	20%
Grand Total	4,990	951	20%

TOURISM BUSINESSES RESPONSE RATES BY REGION			
Region	Invited	Total Completes	Response Rate
Vancouver, Coast & Mountains	1,294	204	15%
Vancouver Island	928	196	17%
Thompson Okanagan	830	165	19%
Kootenay Rockies	464	124	21%
Northern BC & Cariboo Chilcotin Coast	428	122	23%
Other	66	73	14%
Total	4,010	710	18%

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



Summary of Responses

The tables below summarize the total number of responses by strata and by region among tourism businesses after removing multiple completes per organization.

SUMMARY OF RESPONSES BY STRATA	
Strata	Total Completes
DMOs	44
Tourism Businesses	710
Visitor Centres/Travel Trade	51
Tourism Industry Associations	77
Grand Total	882

TOURISM BUSINESSES RESPONSES BY REGION	
Region	Total Completes
Vancouver, Coast & Mountains	192
Vancouver Island	155
Thompson Okanagan	158
Kootenay Rockies	96
Northern BC & Cariboo Chilcotin Coast	100
Other / Non-Classified	9
Total	710





Highlights

FAMILIARITY WITH DESTINATION BC'S PROGRAMS AND SERVICES

Familiarity with the programs and services that Destination BC offers declined in 2022, due to a decline in familiarity among Tourism Businesses. Increasing the extent to which Tourism Businesses are familiar with Destination BC's programs and services is key to increasing their satisfaction with the organization.

Destination BC may want to target small tourism businesses in this regard as they are the least familiar with Destination BC's programs and services.

85%

+5 increase in 2022 from 80%

**Overall Satisfaction With
Destination BC's Performance**

Only those who are at least somewhat familiar with Destination BC's programs and services rate Destination BC's overall performance. Satisfaction with Destination BC's overall performance increased in 2022 by 5 points from 80% to 85% giving a rating of 7 or above out of 10. This because the percentage of respondents who expressed that they are very familiar with Destination BC's programs and services increased relative to 2021—and respondents who are very familiar with Destination BC's programs and services are twice as likely than those less familiar to give Destination BC top marks for its overall performance.



Highlights



3.8/5 Rating

to Destination BC for its
leadership in marketing BC

for providing tourism-related
research and insight

for enhancing public awareness of
tourism and its importance to BC

DELIVERING ON ITS LEGISLATIVE MANDATE

Consistent with previous years, industry members give the highest ratings to Destination BC for its leadership in marketing British Columbia (3.8/5), enhancing public awareness of tourism and its importance to British Columbia (3.8/5), and providing tourism-related research and insights (3.8/5) — with ratings of this latter area of its mandate having increased significantly this year. Respondents also give Destination BC high ratings for supporting the industry's recovery from COVID-19.



Highlights

Also consistent with previous years, respondents give weaker ratings to Destination BC for the areas of its mandate that support community and regional tourism programs.

A FEW RESULTS TO NOTE BY STRATA GROUP:

- Tourism Businesses give Destination BC much weaker ratings to Destination BC for its support of community tourism programs.
- DMOs (who are the group most familiar with Destination BC) give the weakest ratings to Destination BC for enhancing public awareness of tourism. They also give relatively weak ratings to Destination BC for creating opportunities for access to shared technology and shared audience data across the BC tourism industry (this latter area is new to the survey).



78%

of tourism businesses expect to be open at full capacity when their next peak season arrives



COVID-19

The results underscore the resilience of Tourism Businesses in the face of COVID-19. For the period April 2021 to March 2022, most Tourism Businesses experienced a decline in revenue and staff reductions and temporary closures were not uncommon. However, over three-quarters (78%) of tourism businesses expect to be open at full capacity when their next peak season arrives. For businesses that will not fully reopen, lack of staffing appears to be the main reason.

Highlights

PROGRAMS & SERVICES

Consistent with its performance in delivering its mandate, Destination BC's greatest strength is its track record of building a strong brand for British Columbia and attracting visitors through the effective, multi-channel promotion of this brand (86% Satisfied/Very Satisfied).

Areas for improvement include those that will support businesses and organizations to make decisions (e.g., providing market and industry intelligence to support decisions) and develop strategic plans, particularly in the areas of destination development.

86% Satisfied/
Very Satisfied

85% Satisfied/
Very Satisfied

PERCEPTIONS & ATTITUDES

Consistent with previous years, respondents perceive Destination BC as providing strong leadership and direction to the BC tourism industry (85% Satisfied/Very Satisfied) and as having highly respectful employees who are knowledgeable about market changes and issues (84% Satisfied/Very Satisfied). They're also confident that Destination BC is focussed on markets and programs that align with industry needs and feel that Destination BC is doing a very good job of informing the industry of its corporate strategy (79% Satisfied/Very Satisfied).

Industry perceptions of Destination BC are somewhat weaker among Tourism Businesses when it comes to collaborating with the industry on key decisions and understanding the needs of businesses and organizations.



Highlights



SUPPORTING THE INDUSTRY AND PERCEIVED RISKS TO TOURISM

Over the next year, respondents want Destination BC to continue to play to its strengths — which means promoting British Columbia and its uniqueness as a travel destination to both North American and overseas markets. Respondents are much less likely to suggest that Destination BC provide support that is not related to marketing (e.g., helping address labour shortages).

The types of support that industry wants Destination BC to provide over the longer term (in the next five years) looks a lot like the types of support they want Destination BC to provide over the next year. However, over the longer term, industry does believe it will be increasingly important for Destination BC to promote and support sustainable tourism.

In terms of risks to the industry over the next five years, the prospect of continued disruption due to climate change (e.g., wildfires, extreme weather events) is top-of-mind, and concerns about how an economic downturn could impact leisure travel are not uncommon. Concerns about another pandemic also loom.





Familiarity, Overall Satisfaction & Performance on Mandate Delivery

Cariboo Chilcotin Coast | Blake Jorgenson

68%

DMOs Very familiar

+5%

Overall Satisfaction

+11%

Vancouver Island

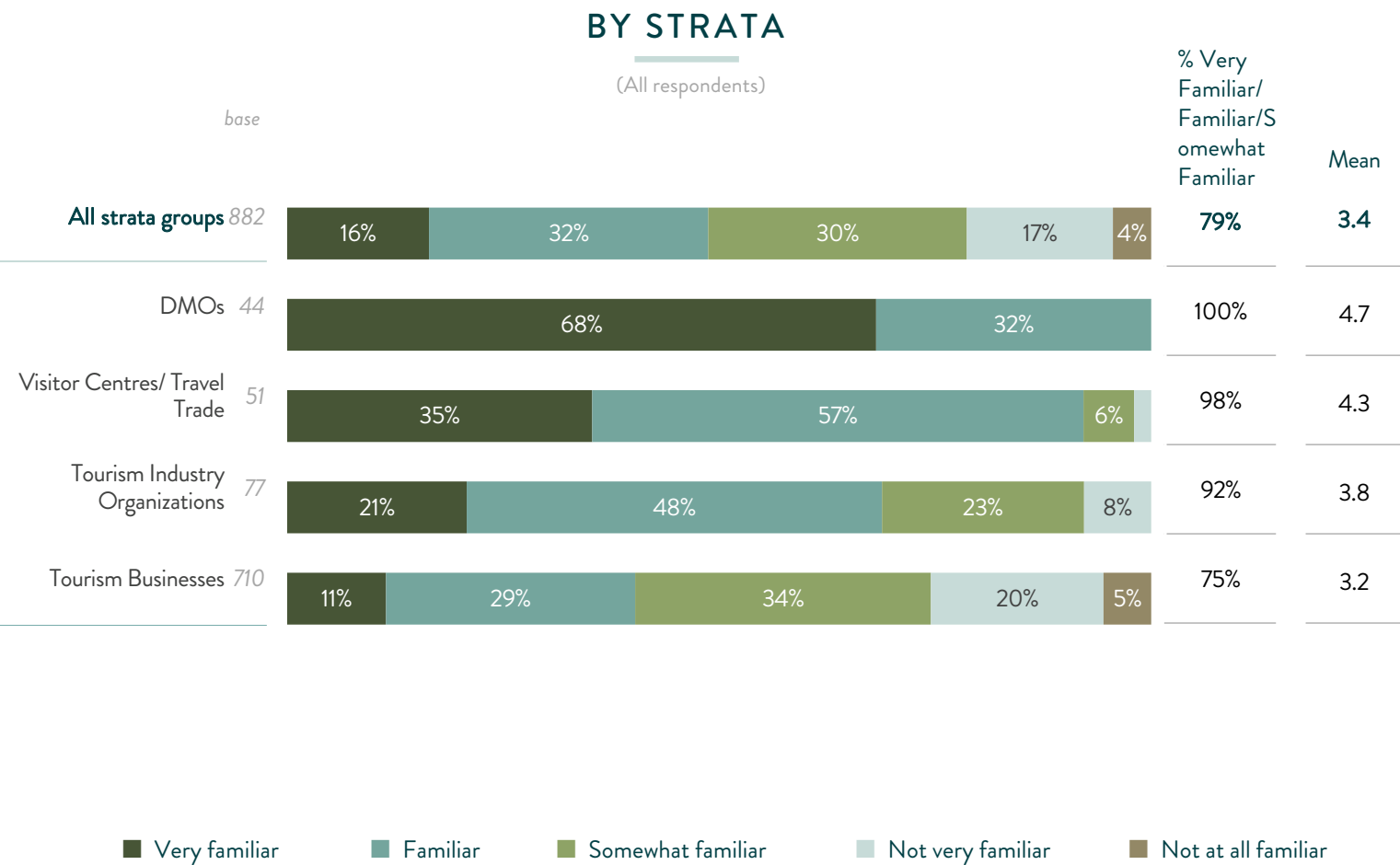
Familiarity with Destination BC's Programs and Services: By Strata

All DMOs, and the vast majority of Visitor Centres/Travel Trade (VC/TTs) and Tourism Industry Organizations (TIOs) are familiar with Destination BC's programs and services.

DMO's are the only group that are likely to be very familiar with Destination BC's programs and services.

Among Tourism Businesses (TBs), familiarity with Destination BC varies widely. While 40% are either very familiar or familiar with what Destination BC does, 25% aren't familiar.

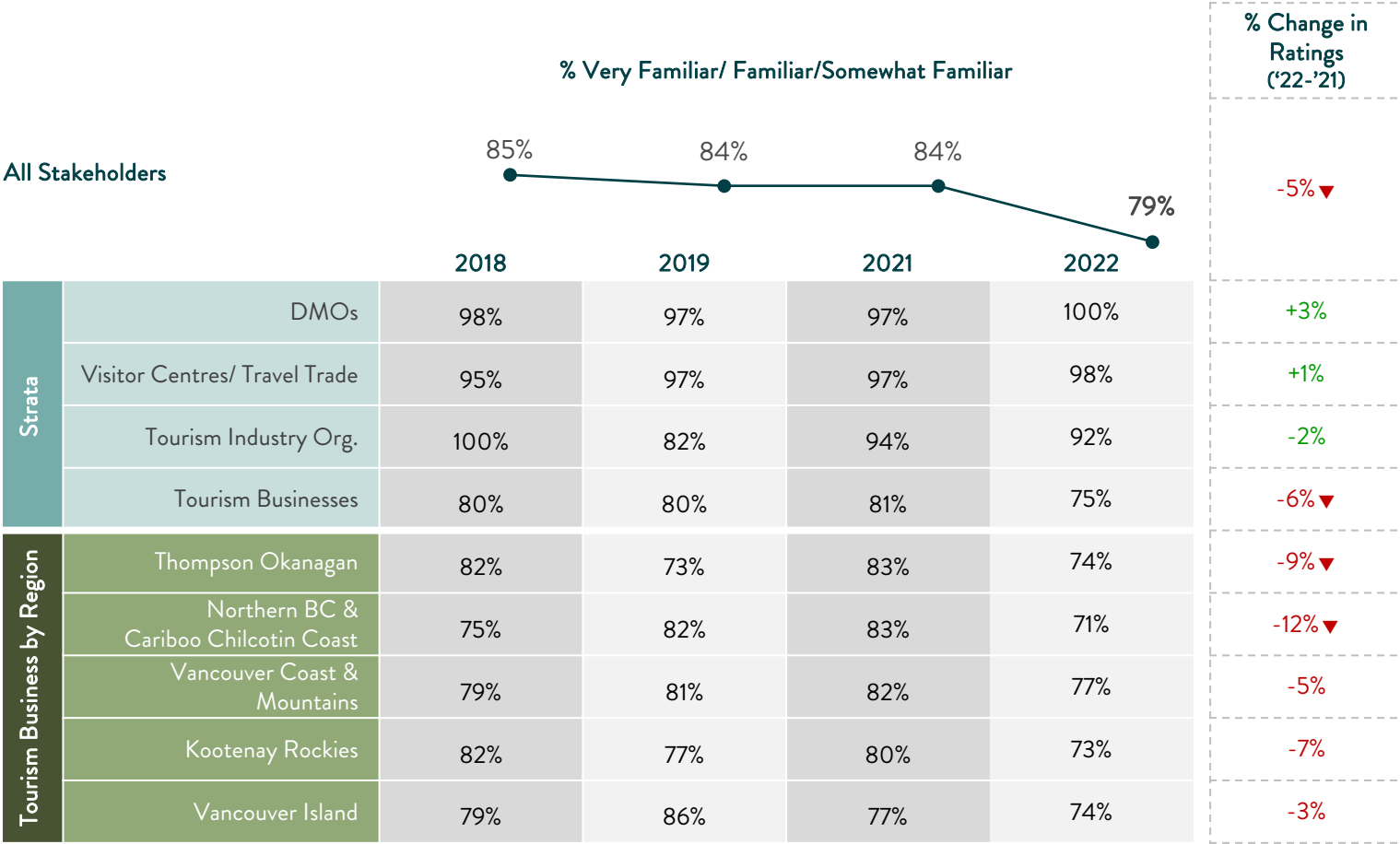
Familiarity is correlated strongly with business size. Among TBs not familiar with what Destination BC does, 64% have fewer than 10 employees. Only 36% of TBs who are familiar with what Destination BC does have fewer than 10 employees.



Familiarity with Destination BC's Programs & Services Longitudinal Comparison



Familiarity with Destination BC's programs and services has gone down in 2022. This is due to a drop in familiarity among TBs – particularly TBs in Northern BC & Cariboo Chilcotin Coast, and in the Thompson Okanagan.



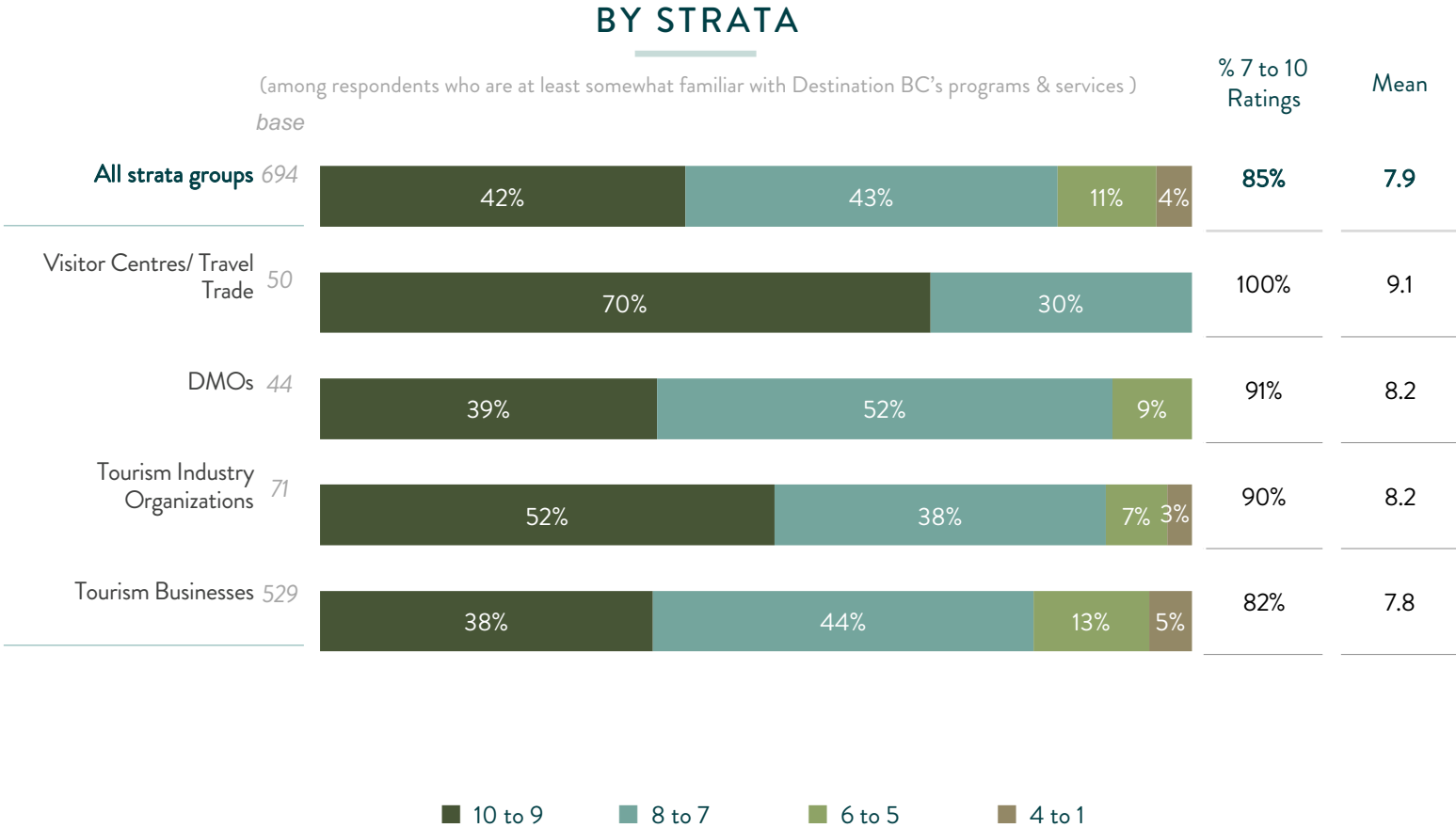
▲/▼ Statistically significant shift



Overall Satisfaction with Destination BC: By Strata



Overall satisfaction is highest among VC/TTs, followed by TIOs, DMOs, and TBs.



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.
Q9a. 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

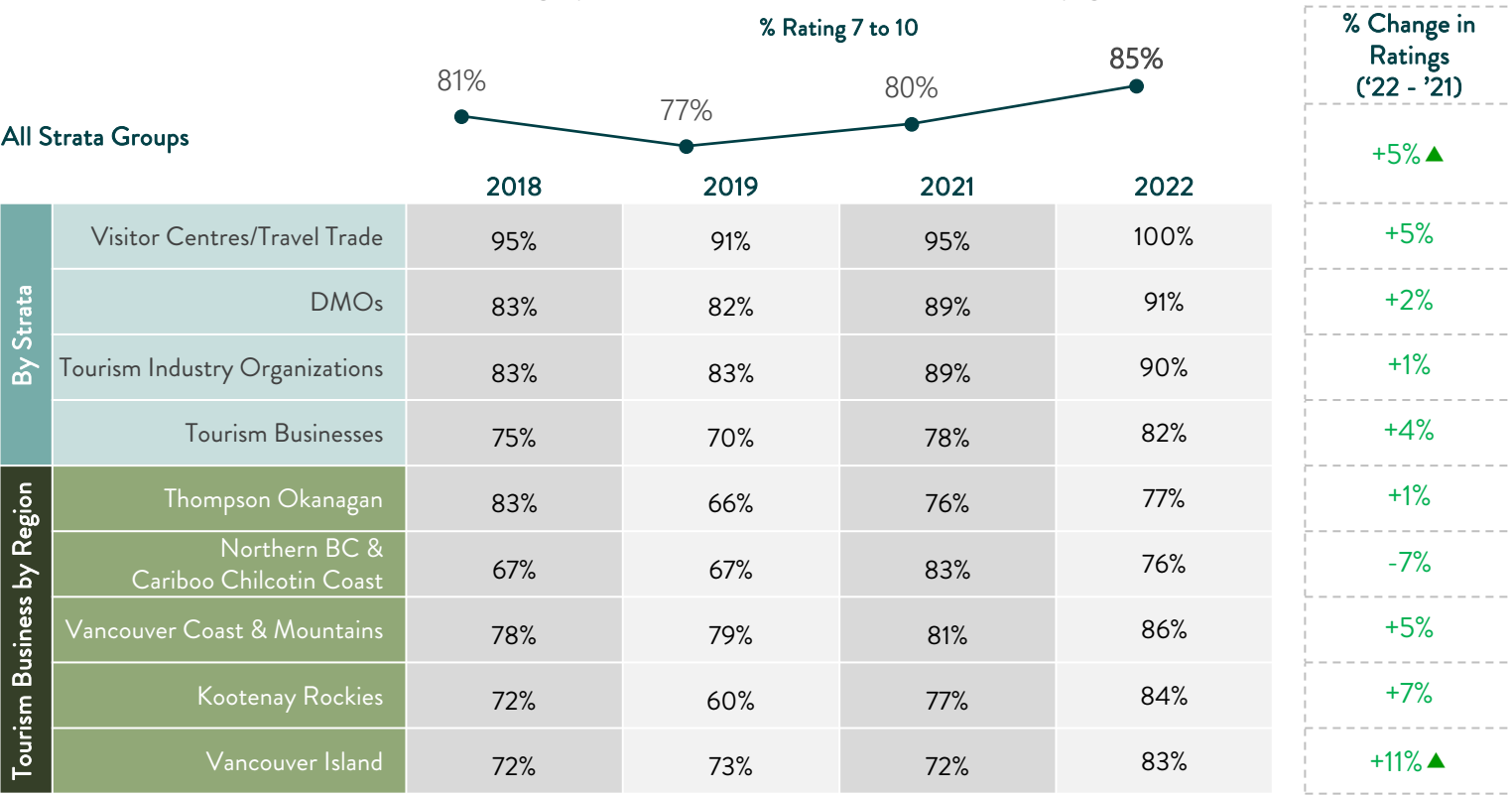


Overall satisfaction increased this year, due to increases among TBs on Vancouver Island, in the Kootenay Rockies, in the Vancouver, Coast & Mountains region, and among VC/TTs.

Kimberley | Mitch Winton

LONGITUDINAL COMPARISON

(among respondents at least somewhat familiar with Destination BC's programs & services)



▲/▼ 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.
Q9a. 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.



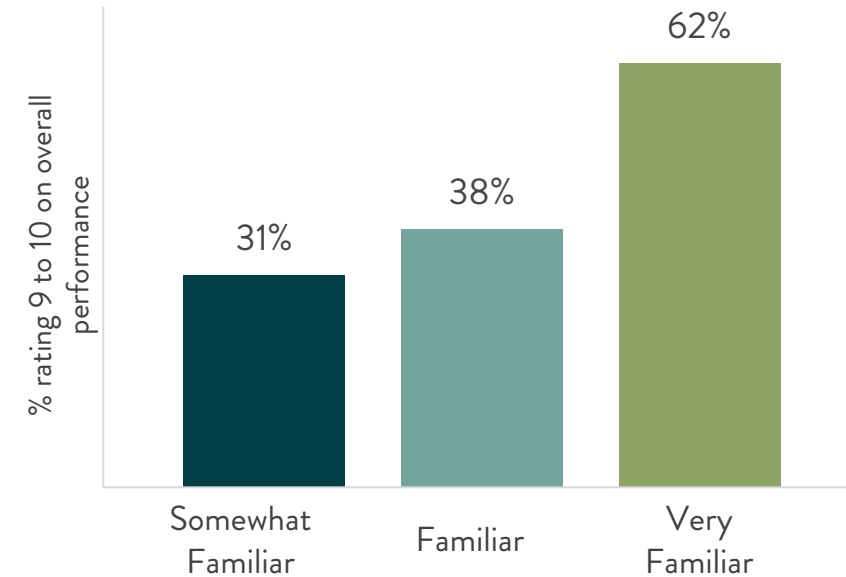
Familiarity and Overall Performance

Continuing to increase familiarity with Destination BC's programs and services among TBs will yield even higher satisfaction with Destination BC's overall performance in the future.

This chart shows the percentage of TBs who rate Destination BC as either a 9 or 10 on overall performance as a function of how familiar they are with Destination BC's programs and services.

Those who are very familiar with what Destination BC offers are twice as likely as those who are somewhat familiar with what Destination BC offers to give Destination BC top marks.

FAMILIARITY AND OVERALL PERFORMANCE



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 burden on stakeholders.)

The results in this section provide an overview of stakeholder views on the following:



Delivering on
Legislative Mandate

Slides 22–25



Overall Satisfaction
with Destination BC

Slides 26–30



Perceptions of and
Attitudes Towards
Destination BC

Slides 31–34



Impact of
COVID-19 on Tourism
Businesses

Slides 35–38



Industry
Organizations

Slides 39–41

Delivering on Legislative Mandate

Note: the overall results for 2022 are presented on the next slide.

Respondents give the highest marks to Destination BC for the areas of its mandate that reflect its broader initiatives – e.g., providing industry leadership in destination marketing, supporting the industry’s recovery from the COVID-19 pandemic, enhancing public awareness of tourism and its importance to British Columbia).

Respondents give weaker marks to Destination BC for initiatives targeted at specific sectors, regions, and communities. TB’s have particularly weak perceptions of Destination BC when it comes to delivering community tourism programs, and this is the area where there is the widest gap in perceptions between TB’s and the other groups.

As can be seen in the Appendix, VC/TTs give the highest marks to Destination BC for delivering on its mandate followed by TIOs, DMOs, and then TBs. There are a few exceptions, though – and these are included in the table on the right.

DMOs give the weakest marks to Destination BC when it comes to enhancing public awareness of tourism and its importance to British Columbia, and they give marks similar to TBs when it comes to regional tourism programs, destination development planning and implementation, and creating opportunities for access to shared technology and shared audience data across the BC tourism industry.

% EXCELLENT / VERY GOOD

	BY STRATA			
	Tourism Businesses	Visitor Centres/ Travel Trade	DMOs	Tourism Ind. Org.
	489-528	30-34	42-44	53-71
Community tourism programs (Destination BC Co-op Marketing Partnerships Program, Municipal and Regional District Tax)	36%	*	62%	60%
Enhancing public awareness of tourism and its importance to British Columbia	61%	91%	50%	68%
Regional tourism programs, destination development planning and implementation	41%	70%	44%	63%
Creating opportunities for access to shared technology and shared audience data across the BC tourism industry	41%	71%	43%	61%

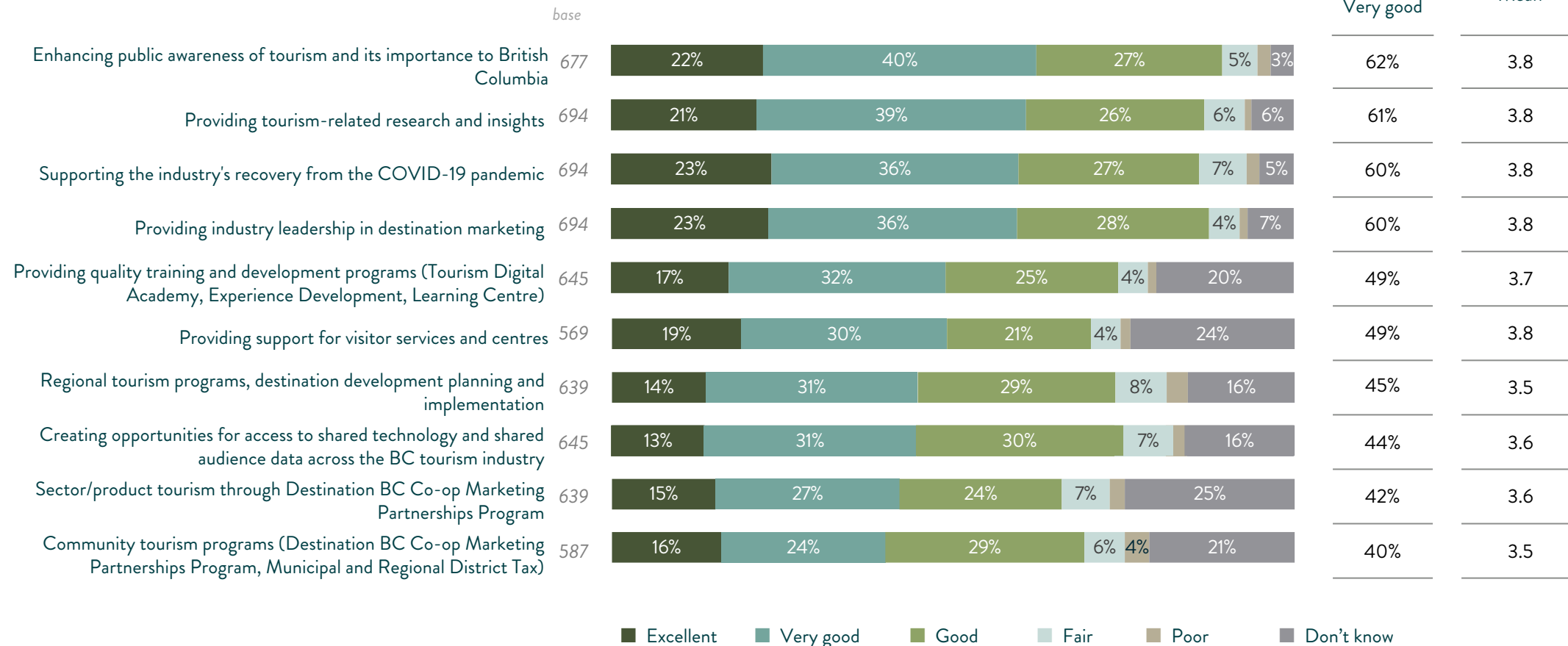


*Caution: small base size
Q4x1/3. Over the past year (April 2021 to March 2022) how would you rate Destination BC’s performance on each of the following?

Delivering on Legislative Mandate

TOTAL 2022

(among respondents who are at least somewhat familiar with Destination BC's programs & services)

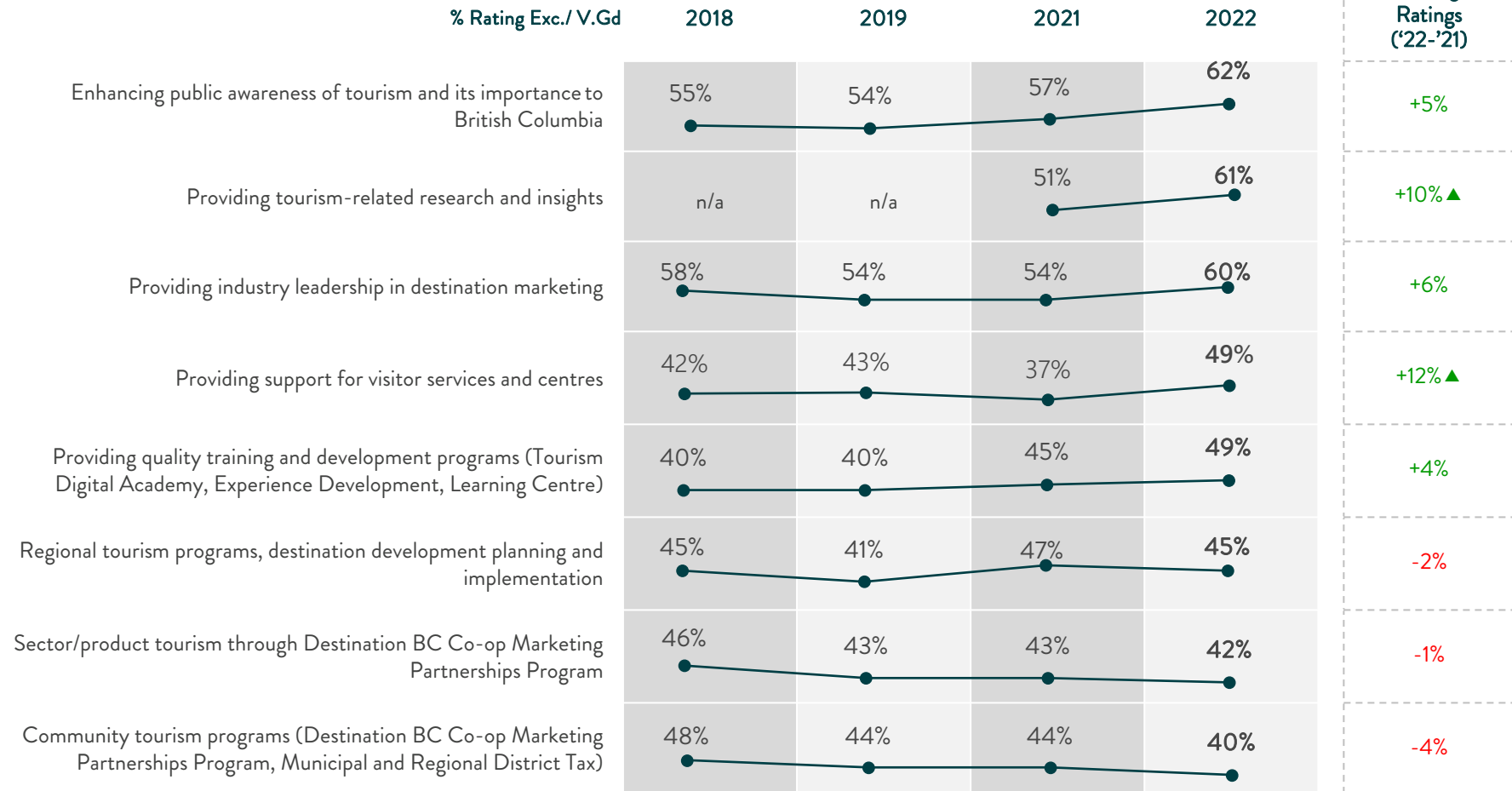


Delivering on Legislative Mandate: Longitudinal Comparison

Relative to 2021, perceptions of Destination BC have improved for providing support for visitor services and centres, and for providing tourism-related research and insights.

LONGITUDINAL COMPARISON

(among respondents at least somewhat familiar with Destination BC's programs & services)



▲/▼ Statistically significant shift



Delivering on Legislative Mandate: Marketing BC as a Destination of Choice

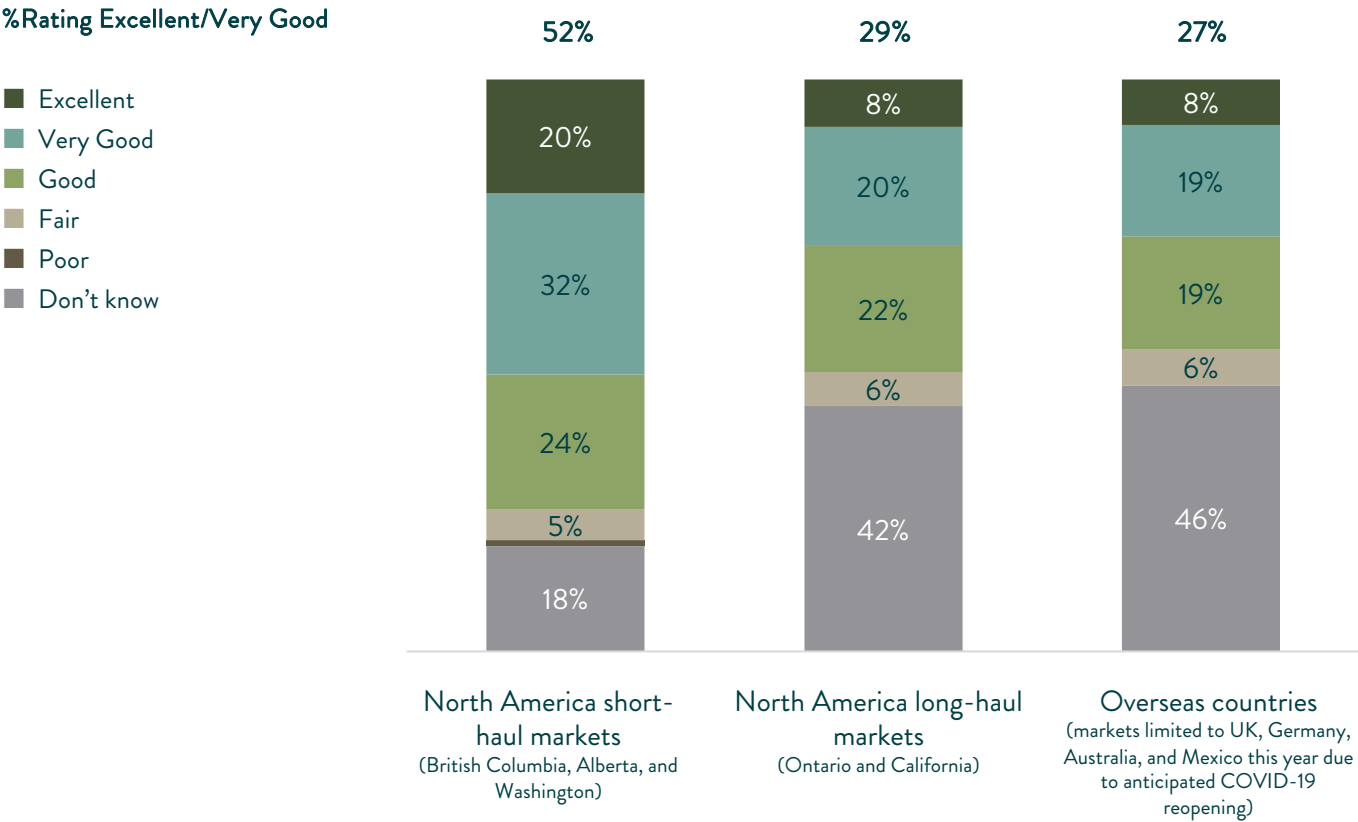


PERFORMANCE IN MARKETING BC AS A DESTINATION OF CHOICE

(among self-identified respondents who are at least somewhat familiar with Destination BC's programs & services)

Respondents have favourable impressions of Destination BC when it comes to marketing BC as a destination of choice in North American short-haul markets.

Industry perceptions of Destination BC's marketing in North American long-haul and overseas markets are much weaker, due to the high percentage of stakeholders who don't know enough about Destination BC's activities in these markets to have an impression.



Note: New question asked in 2022.
Base: 694
Q4x2. And how would you rate Destination BC's performance over the last year (April 2021 to March 2022) on marketing British Columbia as a destination of choice in...



Overall Satisfaction with Destination BC

The next slide illustrates the strengths and areas for improvement for Destination BC's programs and services. The strengths and areas for improvement are determined based on a combination of Destination BC's performance and the level of importance that industry places on each program/service area. The results for each group are included in the appendix. Strengths are areas in which stakeholder satisfaction is high or commensurate with the importance placed on the program/service area. Areas for improvement are those in which a notable gap exists between satisfaction and importance.

Areas of Improvement

STRENGTHS

Destination BC's **core strengths** include:

Overall brand promotion – Promoting a strong brand that will help increase tourism visits and expenditures in British Columbia

Social media - Using social media channels to promote remarkable vacation experiences in British Columbia

Destination BC's **other strengths** include:

Industry communications - Communicating regularly with your business/organization

Marketing programs – Delivering effective marketing programs

Local, multi-channel marketing - Providing exposure for tourism businesses/ experiences through a variety of mediums such as Destination BC websites, social media, etc. in our local and BC resident markets

AREAS FOR IMPROVEMENT

Destination BC's **areas for improvement** include:

Knowledge transfer – Assisting travel trade in key markets to improve product knowledge and sales of BC's travel experience

Planning support - Leading and facilitating long-term destination development planning and implementation (Iconics, Destination Development Plans)

Providing competitive intelligence – Competing effectively against our key competitive destination brands

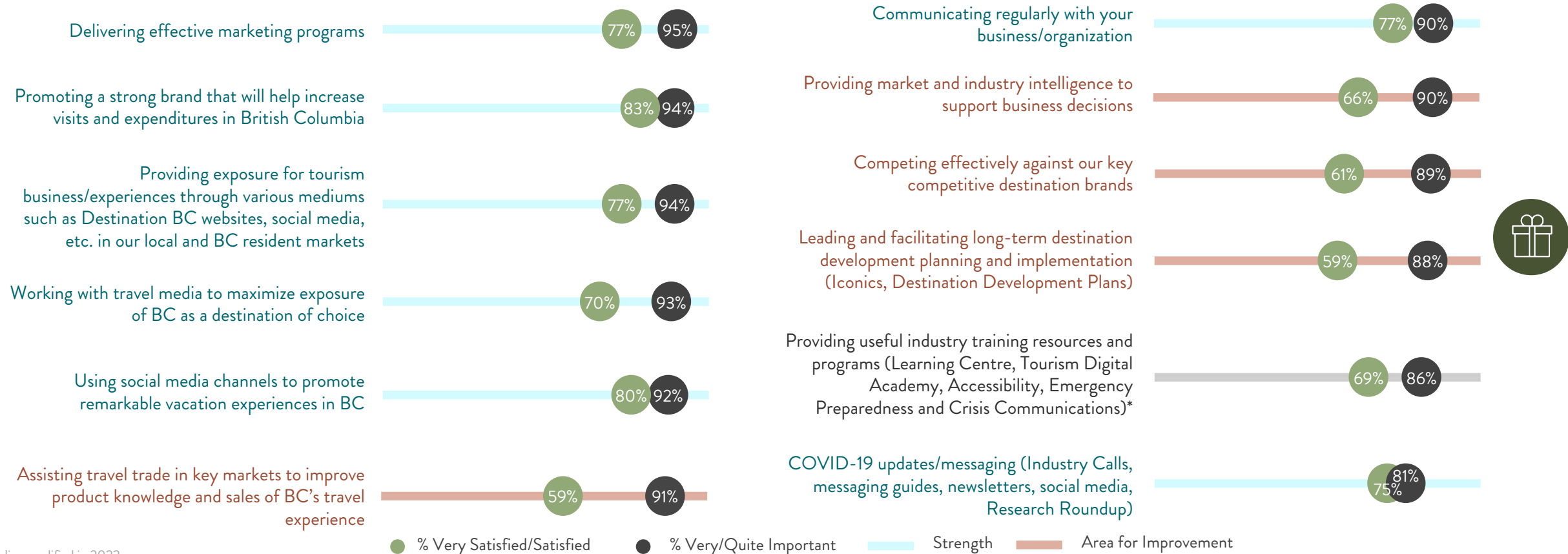
Decision support - Providing market and industry intelligence to support decisions



Programs & Service Areas: All Stakeholders

OVERALL SATISFACTION & IMPORTANCE OF PROGRAMS & SERVICES PROVIDED

(among respondents who are at least somewhat familiar with Destination BC's programs & services)



*Wording modified in 2022.

Q6 Base: 594-694; Q10 Base: 527-605

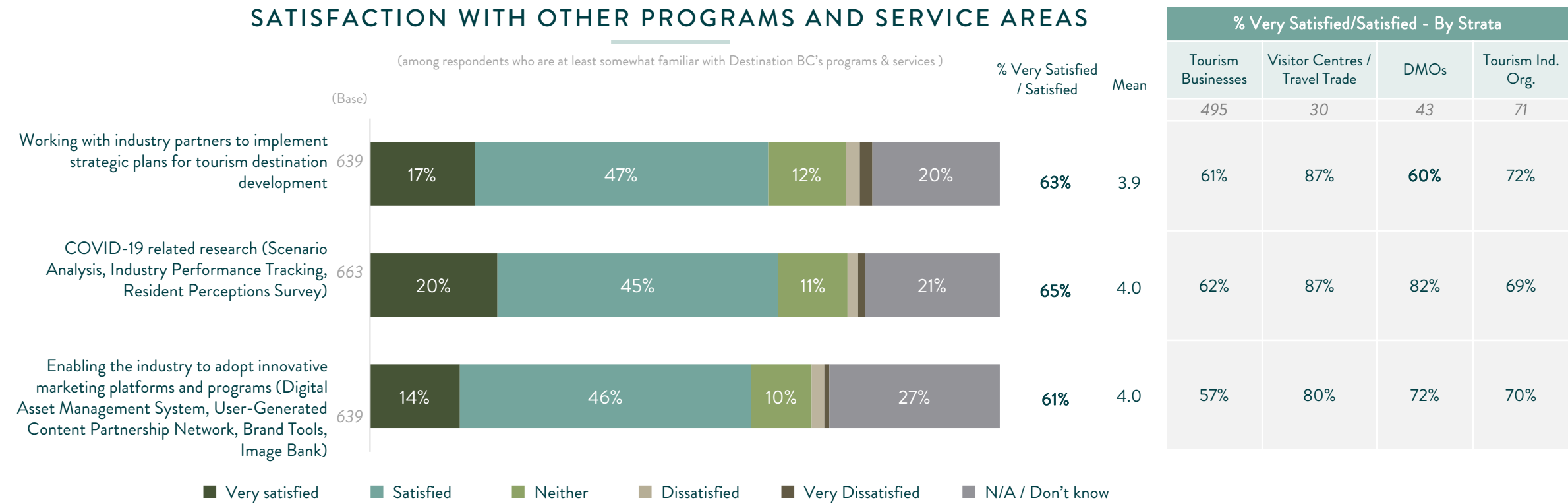
Q6x1/2. Thinking about the past year (April 2021 to March 2022), how satisfied are you with the following Destination BC programs and services?

Q10. Looking forward, how important is it for Destination BC to continue playing a role in the following areas?

Satisfaction with Other Program and Service Areas



Destination BC’s performance is relatively strong when it comes to providing COVID-19 related research, enabling the industry to adopt innovative marketing platforms and programs, and working with industry partners to implement strategic plans for tourism destination development. However, DMOs give Destination BC lower ratings in this area compared to the other two areas.



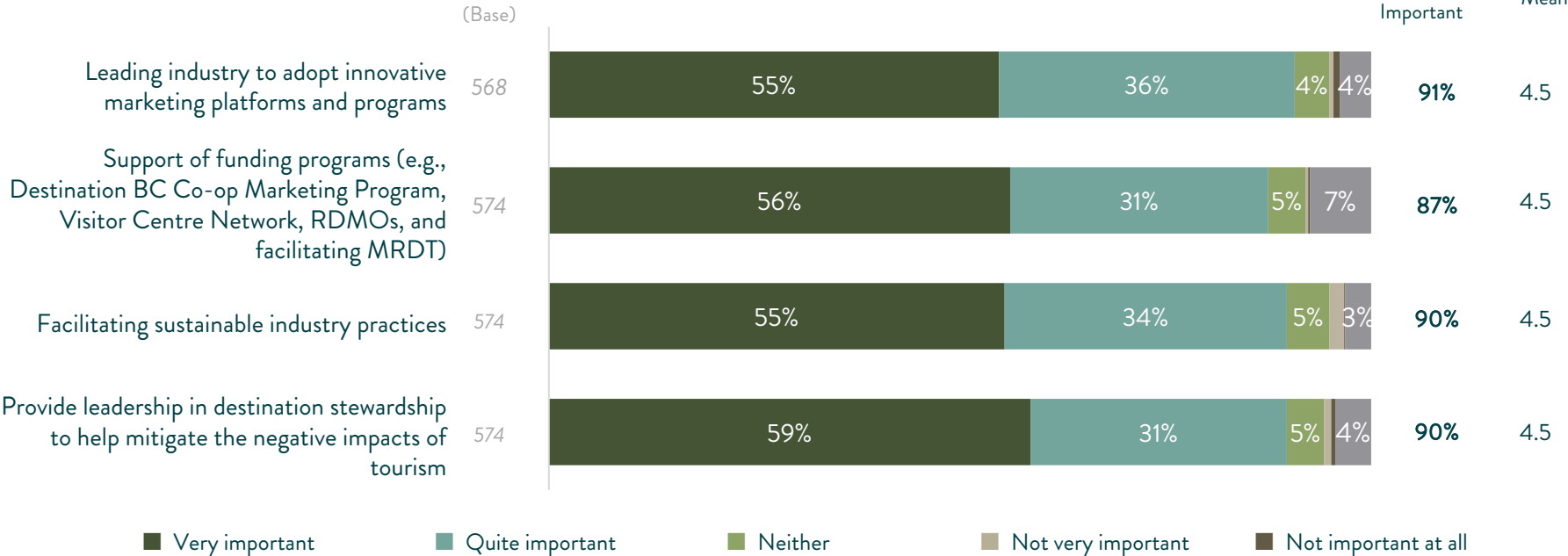
Importance of Other Program and Service Areas



Virtually all industry groups want Destination BC to take a leading role with it comes to adopting innovative marketing platforms and programs, destination stewardship, and facilitating sustainable industry practices. They consider it very important for Destination BC to fund programs that support local tourism and specific tourism sectors.

IMPORTANCE OF OTHER PROGRAMS AND SERVICE AREAS

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



% Very / Quite Important - By Strata			
Tourism Businesses	Visitor Centres / Travel Trade	DMOs	Tourism Ind. Org.
433-437	30-31	41-42	64
90%	93%	90%	95%
84%	100%	98%	97%
88%	90%	93%	98%
88%	94%	95%	95%

A close-up photograph of a person wearing traditional Indigenous regalia. The person is holding a large, dark feather in their right hand and a shallow, oval-shaped stone bowl in their left hand. The regalia includes a yellow fringed garment and a red beaded necklace. The background is dark and out of focus.

Perceptions & Attitudes

Perceptions & Attitudes


Note: the overall results for 2022 results are presented on the next slide. The full results by strata are included in the appendix.

Respondents hold Destination BC in particularly high regard when it comes to providing leadership and direction to the BC tourism industry and having respectful employees.

Respondents also regard Destination BC highly when it comes to focusing on markets and programs that align with the needs of the industry, informing the industry about Destination BC's strategy, and having employees who are knowledgeable about changes and issues that impact tourism.

Industry perceptions are somewhat weaker when it comes to collaborating with industry, understanding the needs of businesses and organizations, addressing questions and concerns, being transparent about its corporate performance, and spending funds wisely and responsibly. Note that the latter three attributes have larger percentages of stakeholders responding with “don’t know” compared to the other attributes.

TBs and DMOs are less likely than the other industry groups to perceive Destination BC as collaborative and understanding their business/organizational needs.

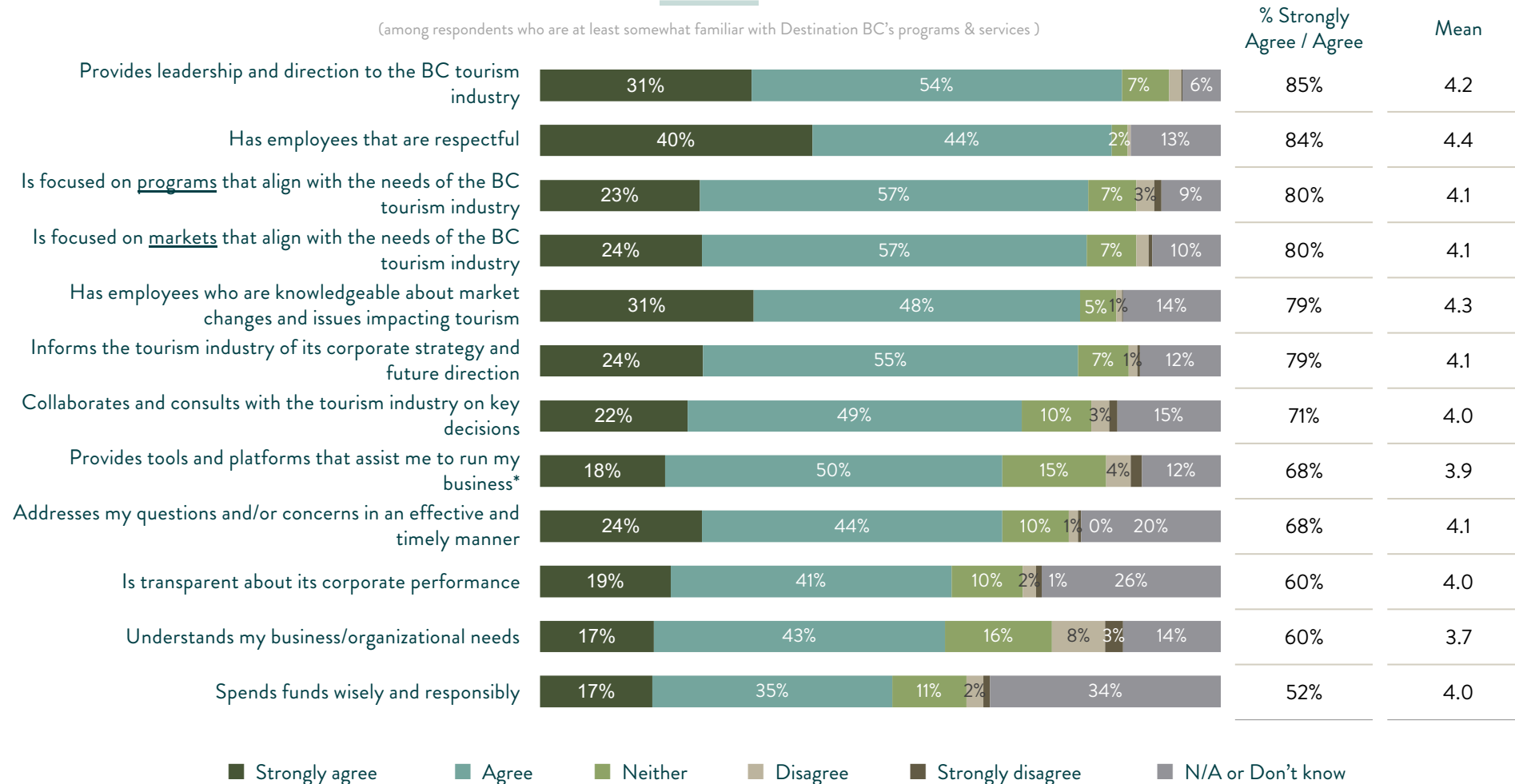
The background of the slide is a photograph of a rocky, grassy hillside with some trees, under a bright sky. A circular icon with a brain and a heart inside is visible on the right side of the image.

	% Strongly Agree / Agree - By Strata			
	Tourism Businesses	Visitor Centres / Travel Trade	DMOs	Tourism Ind. Org.
	449	50	42	64
Collaborates and consults with the tourism industry on key decisions	66%	94%	76%	83%
Understands my business/organizational needs	53%	94%	69%	72%

Perceptions and Attitudes: 2022

OVERALL PERCEPTIONS & ATTITUDES

(among respondents who are at least somewhat familiar with Destination BC's programs & services)



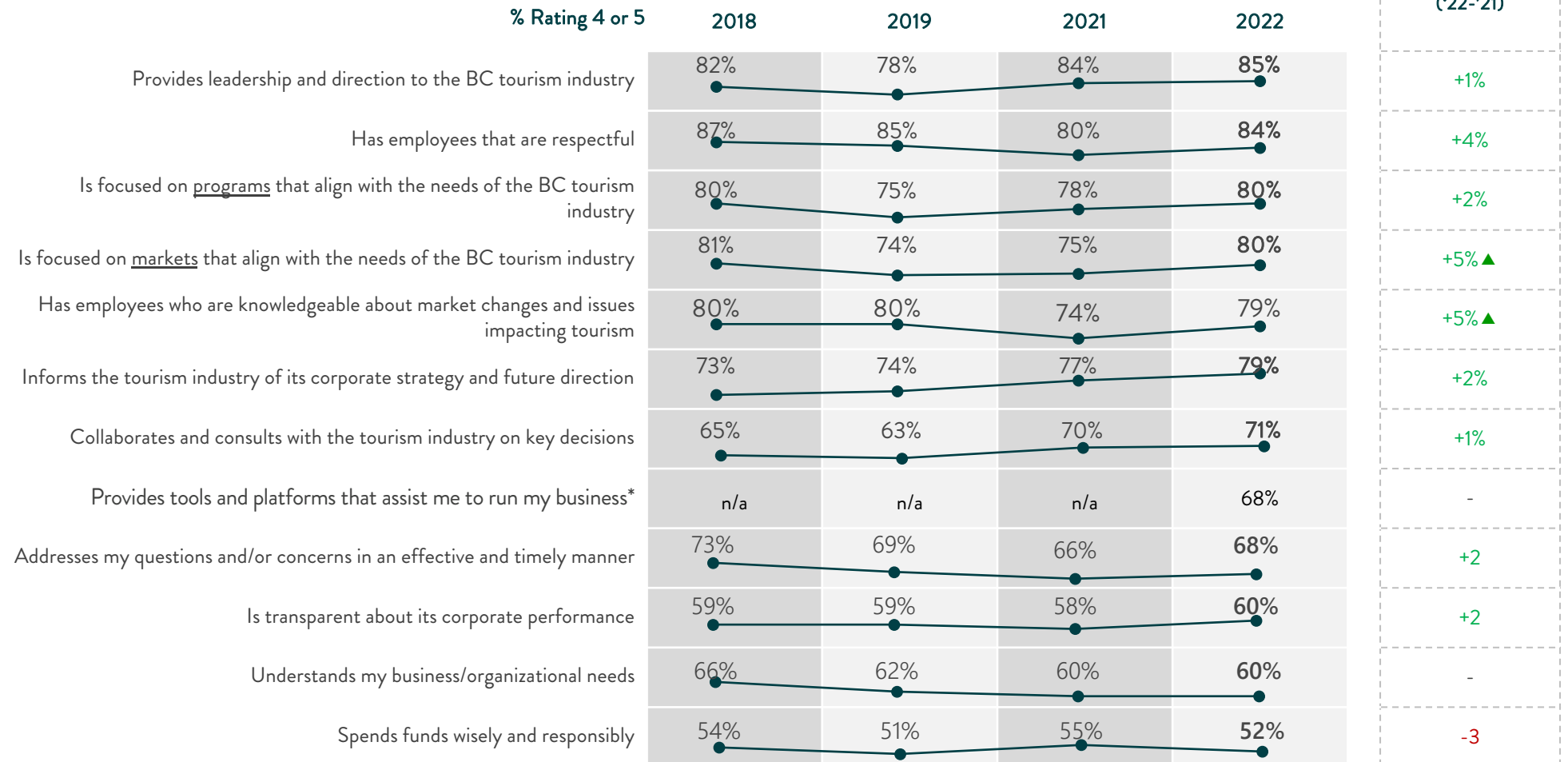
Perceptions and Attitudes: Longitudinal Comparison



LONGITUDINAL COMPARISON

(among respondents at least somewhat familiar with Destination BC's programs & services)

The 2022 results are generally consistent with the results from 2021, with the exception that respondents in 2022 are more likely to view Destination BC as focussed on markets that align with the needs of the industry and having employees who are knowledgeable about market changes and issues that impact tourism.



▲/▼ Statistically significant shift

Base: 605

*New question asked in 2022

Q7. Please indicate how much you agree with the following statements? Destination BC...

Impact of COVID-19 on Tourism Businesses

Impact of COVID-19 On Tourism Businesses

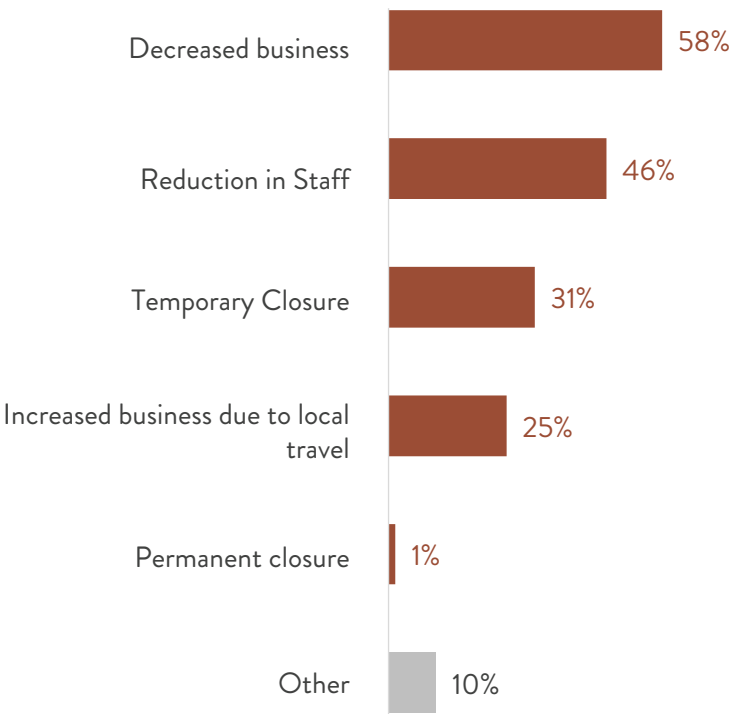


The most common impact of COVID-19 in the past year (April 2021 to March 2022) was a decrease in business, followed by a reduction in staff.

While just under one-third (31%) of businesses had to temporarily close, one-quarter experienced an increase in business due to local travel.

Businesses in the VCM region were the most likely to experience a decrease in business, staff reductions, and temporary closures. Vancouver Island and Thompson Okanagan businesses were the most likely to experience an increase in business due to local travel.

Impact of COVID-19 on Tourism Businesses



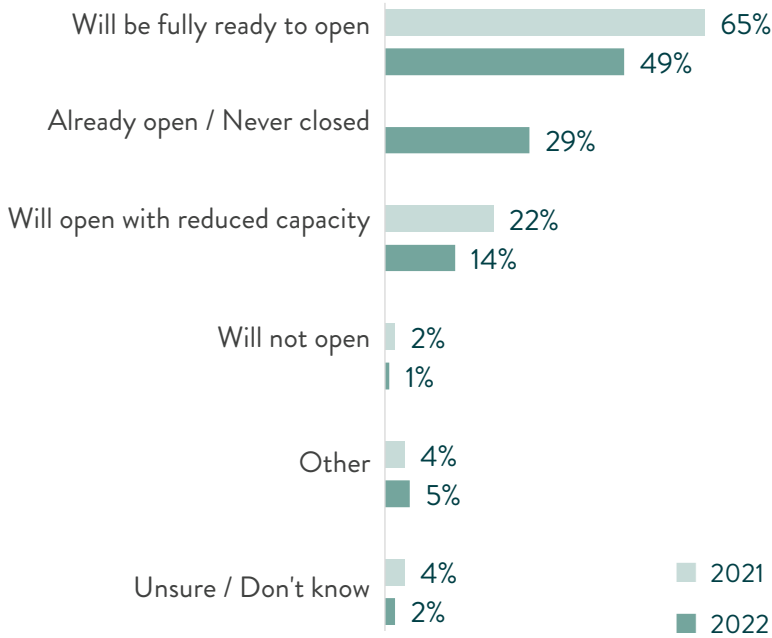
Region (2022)				
Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
125	153	113	77	79
57%	59%	55%	60%	59%
43%	50%	46%	43%	46%
32%	37%	26%	26%	30%
33%	20%	31%	19%	19%
2%	2%	0%	0%	4%
6%	10%	11%	13%	9%



Note: 5% of Tourism Business respondents say that their business was not impacted by COVID-19.
Base (2022): 555
X4a. What impact has the COVID-19 pandemic had on your business during the last year (April 2021 to March 2022)? Please select all that apply.

Tourism Businesses Preparedness For Next Peak Season

PREPAREDNESS FOR NEXT PEAK SEASON



These results illustrate the strong rebound for TBs in 2022.

In the past year, three-in-ten TBs (29%) didn't need to close at all. Adding this to the 49% that will be fully ready to open yields over three-quarters (78%) of TBs who expect to be open at full capacity during their next peak season.

Region (2022)				
Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
125	153	113	77	79
53%	42%	47%	52%	56%
27%	31%	35%	27%	23%
15%	16%	14%	14%	10%
1%	1%	0%	1%	1%
4%	6%	3%	4%	6%
0%	3%	1%	1%	4%



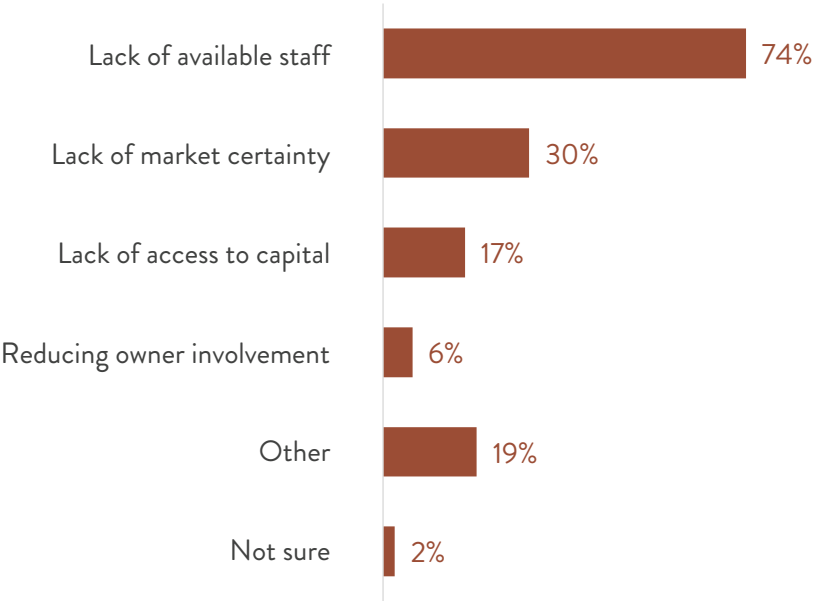
Barriers to Fully Reopening



The main reason that businesses will not fully re-open is a **lack of available staff**.

BARRIERS TO FULLY REOPENING BUSINESS

(among tourism respondents that will not open or will open with reduced capacity)



Base: 84
X5b. What are the barriers to fully reopening? Select all that apply.



Industry Demographics

Industry Demographics

	Total	Strata			
		Tourism Businesses	Visitor Centres/Travel Trades	DMOs	Tourism Ind. Org.
Base	882	710	51	44	77
Job Title / Role					
President or Owner	43%	49%	12%	23%	14%
Vice President	3%	2%	2%	11%	3%
Director or Manager	40%	35%	71%	57%	55%
Project Lead, Sales or Marketing Specialist	6%	6%	2%	5%	6%
Media Relations Specialist	1%	1%	0%	2%	1%
Other	9%	7%	14%	2%	21%

Tourism Business: Firmographics

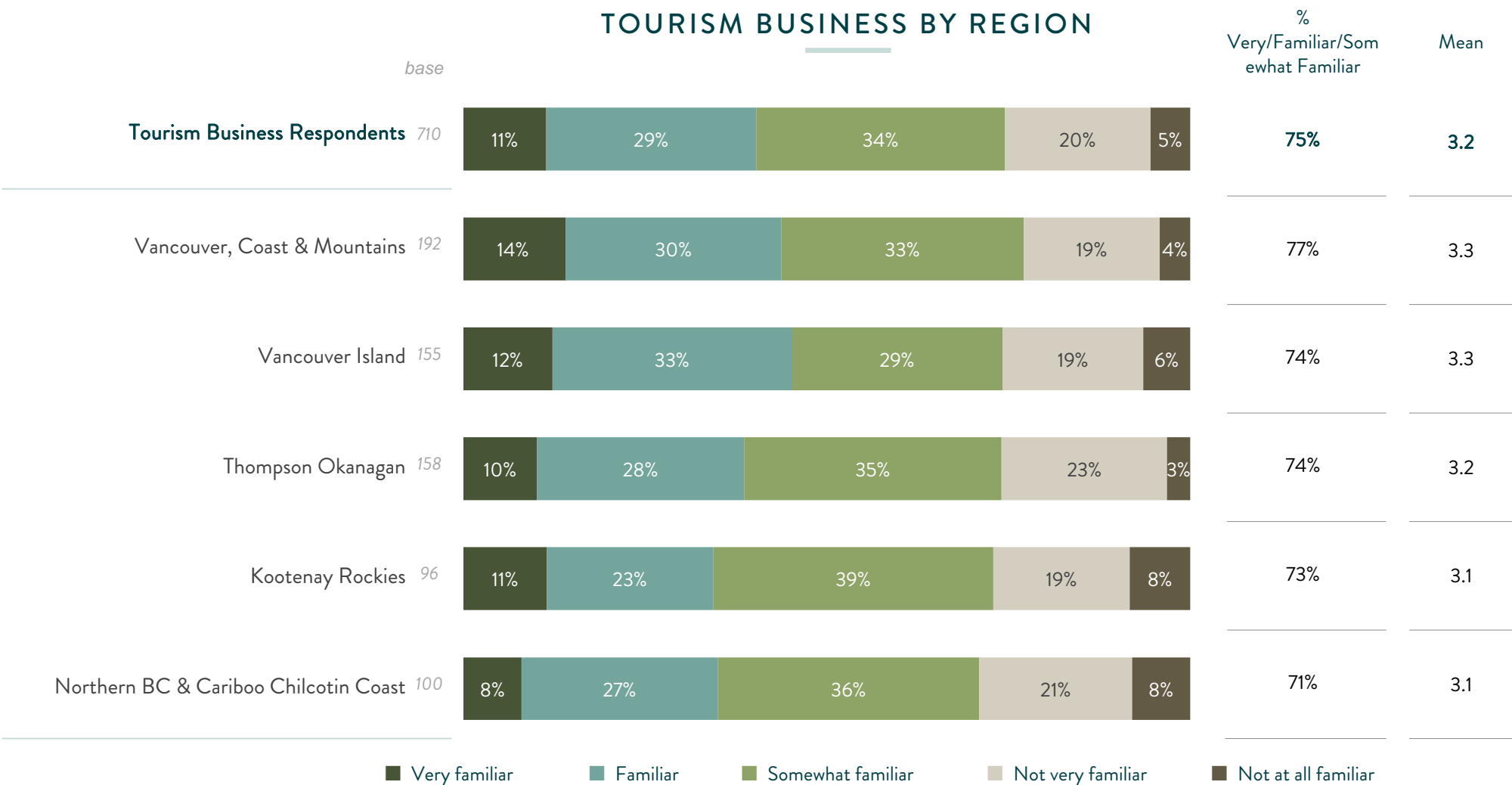
	Total	Tourism Business by Region				
		Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Northern BC & Cariboo Chilcotin	Kootenay Rockies
Base	555	124	142	111	79	77
Sector						
Accommodation	48%	53%	36%	41%	81%	48%
Attraction	24%	25%	29%	26%	20%	17%
Food and beverage	22%	15%	21%	29%	24%	23%
Outdoor recreation	30%	37%	25%	23%	30%	43%
Transportation	8%	10%	13%	5%	6%	5%
Other	17%	12%	18%	15%	11%	12%
Years in Operation						
Average (years)	25	23	25	26	24	24
Size (no. of employees)						
1 to 4	34%	32%	19%	37%	57%	32%
5 to 9	15%	15%	15%	14%	15%	14%
10 to 19	14%	15%	13%	18%	9%	18%
20 to 34	13%	15%	15%	9%	11%	13%
35 to 100	12%	10%	20%	10%	6%	13%
More than 100	11%	10%	15%	13%	1%	5%
Unsure/Don't know	1%	2%	1%	0%	0%	4%



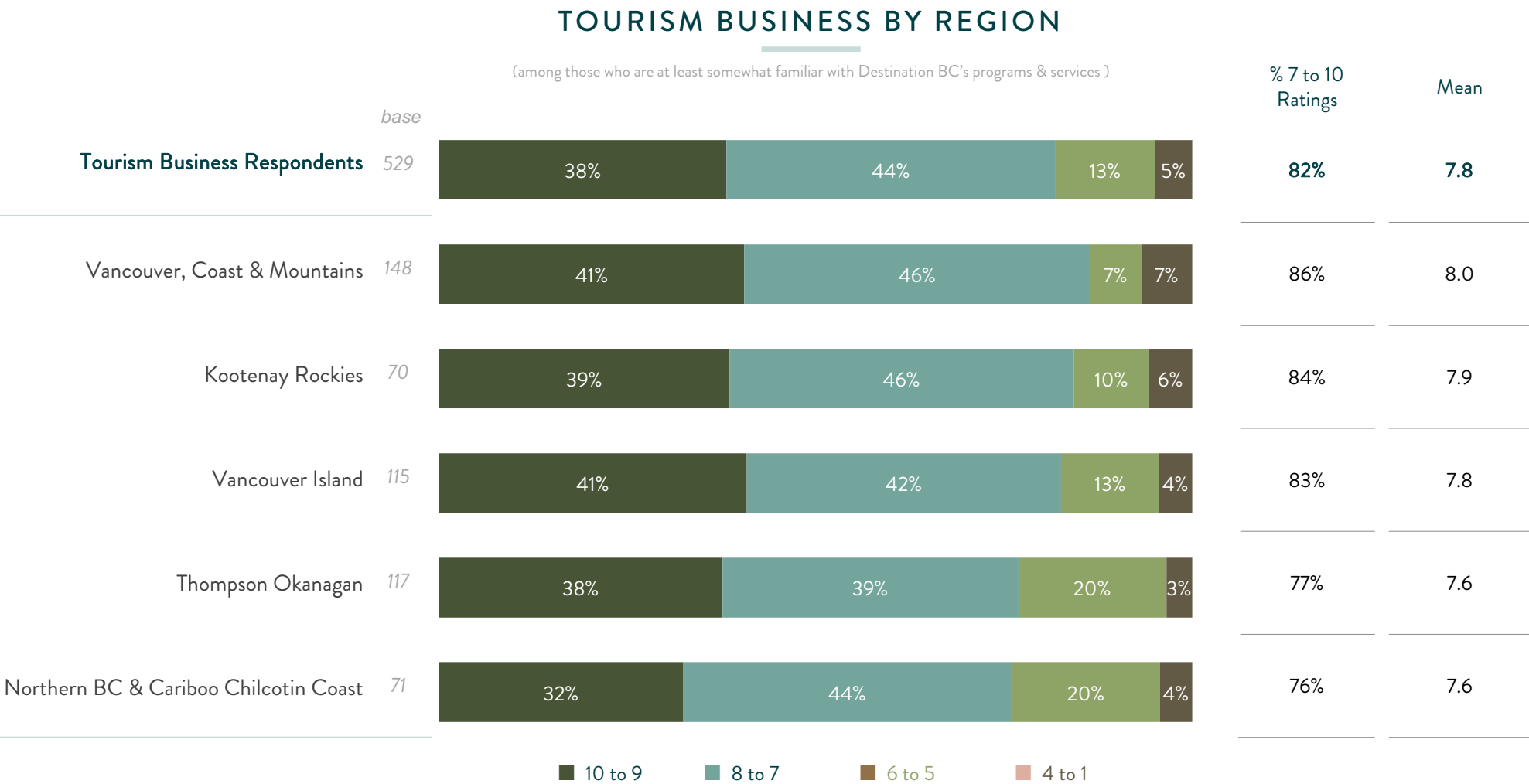
An aerial photograph of a river with vibrant turquoise water, winding through a winter landscape. The banks are covered in snow and dotted with evergreen trees. The river's path is clearly defined by the contrast between the white snow and the deep blue-green water. The overall scene is serene and captures a natural beauty in a cold environment.

Appendix – Strata & Region

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



Overall Satisfaction with Destination BC: Tourism Business by Region



Note: In 2021, respondents were asked to rate their overall satisfaction with Destination BC toward the end of the survey, instead of at the beginning.
Q9a. 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

(among respondents at least somewhat familiar with Destination BC's programs & services)

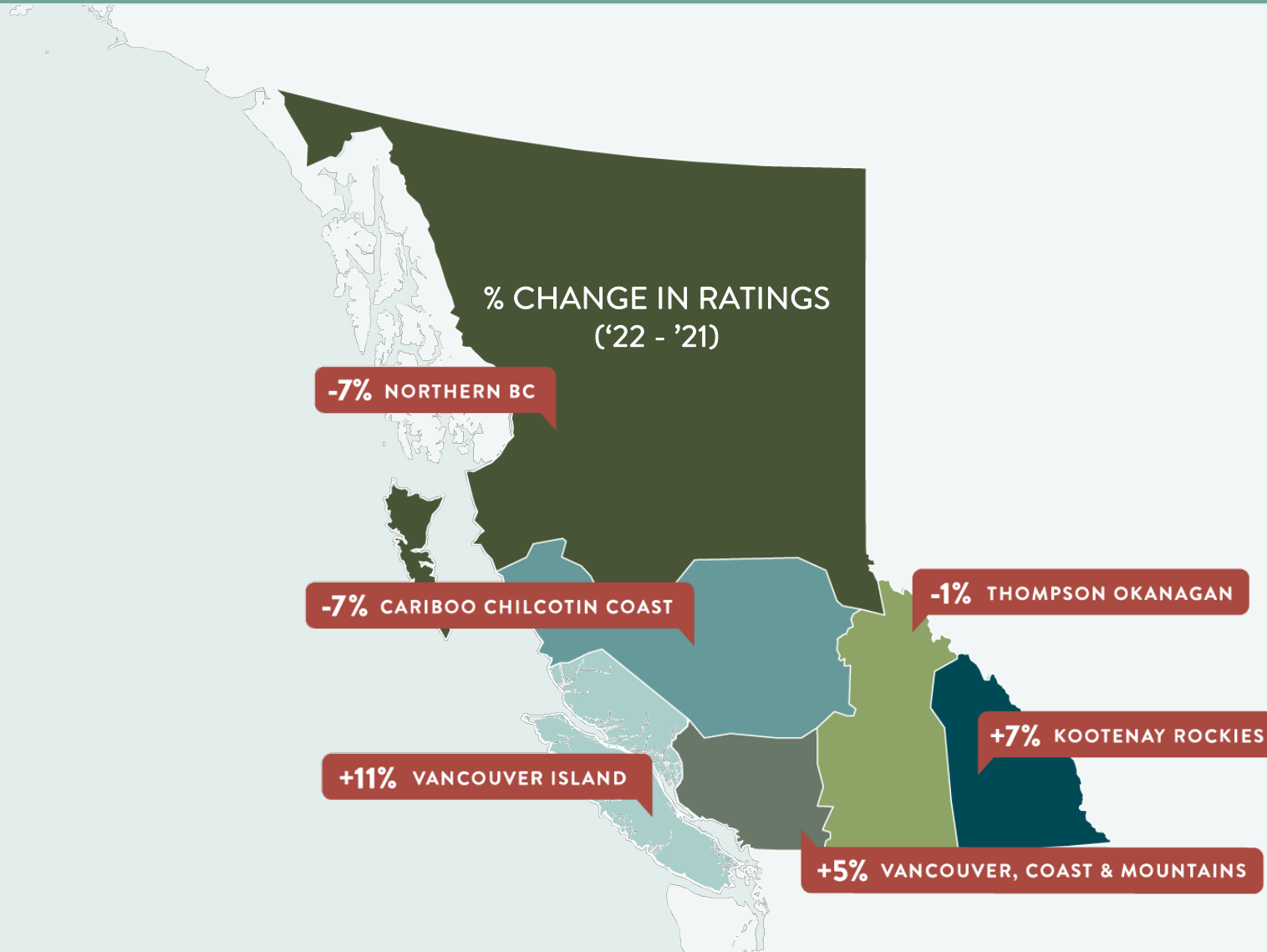
		2018		2019		2021		2022		% Change in Mean (22 - '21)	% Change in Ratings ('22 - '21)
		Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10		
By Strata	All Stakeholders	7.7	81%	7.5	77%	7.6	80%	7.9	85%	+4%	+5%▲
	Visitor Centres/Travel Trades	8.2	95%	8.1	91%	8.6	95%	9.1	100%	+6%	+5%▲
	DMOs	7.6	83%	7.4	82%	8.2	89%	8.2	91%	0%	+2%
	Tourism Industry Organizations	7.8	83%	7.9	83%	7.7	89%	8.2	90%	+6%	+1%
	Tourism Businesses	7.3	75%	7.2	70%	7.5	78%	7.8	82%	+4%	+4%
Tourism Business by Region	Northern BC & Cariboo Chilcotin Coast	7.0	67%	7.0	67%	7.6	83%	7.6	76%	0%	-7%
	Vancouver, Coast & Mountains	7.5	78%	7.7	79%	7.8	81%	8.0	86%	+3%	+5%
	Kootenay Rockies	7.2	72%	7.0	60%	7.3	77%	7.9	84%	+8%	+7%
	Thompson Okanagan	7.5	83%	7.0	66%	7.5	76%	7.6	77%	+1%	+1%
	Vancouver Island	7.3	72%	7.1	73%	7.1	72%	7.8	83%	+10%	+11%▲



▲/▼ Statistically significant shift

Note: In 2021, respondents were asked to rate their overall satisfaction with Destination BC toward the end of the survey, instead of at the beginning.
Q9a. 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



Delivering on Legislative Mandate: by Strata and Region

% EXCELLENT / VERY GOOD

(among respondents at least somewhat familiar with Destination BC's programs & services)

	2021 Total	2022 Total	By Strata				Tourism Business by Region				
			Tourism Businesses	Visitor Centres / Travel Trades	DMOs	Tourism Ind. Org.	Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Northern BC & Cariboo Chilcotin	Kootenay Rockies
Base	691-729	569-694	443-529	29-50	42-44	53-71	96-115	118-148	93-117	64-71	65-70
Enhancing public awareness of tourism and its importance to British Columbia	57%	62%	61%	91%	50%	68%	66%	62%	62%	58%	57%
Providing tourism-related research and insights	51%	61%	56%	94%	61%	73%	63%	56%	56%	45%	61%
Supporting the industry's recovery from the COVID-19 pandemic*	-	60%	55%	84%	66%	75%	61%	58%	50%	45%	59%
Providing industry leadership in destination marketing	54%	60%	55%	82%	64%	73%	63%	59%	54%	44%	54%
Providing quality training and development programs (Tourism Digital Academy, Experience Development, Learning Centre)	45%	49%	44%	81%	50%	69%	50%	46%	44%	36%	41%
Providing support for visitor services and centres	37%	49%	44%	83%	56%	69%	48%	47%	45%	42%	37%
Regional tourism programs, destination development planning and implementation	47%	45%	41%	70%	44%	63%	46%	41%	41%	35%	39%
Creating opportunities for access to shared technology and shared audience data across the BC tourism industry*	-	44%	41%	71%	43%	61%	46%	41%	42%	33%	41%
Sector/product tourism through Destination BC Co-op Marketing Partnerships Program	43%	42%	38%	57%	51%	61%	41%	39%	43%	32%	33%
Community tourism programs (Destination BC Co-op Marketing Partnerships Program, Municipal and Regional District Tax)	44%	40%	36%	**	62%	60%	38%	36%	42%	25%	35%



*New questions added this year; **Not displayed due to small base size (n<10)

Q4. Over the past year (April 2021 to March 2022) how would you rate Destination BC's performance on each of the following?

Delivering on Legislative Mandate: by Strata and Region

MEAN SCORES

(among respondents at least somewhat familiar with Destination BC's programs & services)

	2021 Total	2022 Total	By Strata				Tourism Business by Region				
			Tourism Businesses	Visitor Centres / Travel Trades	DMOs	Tourism Ind. Org.	Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Northern BC & Cariboo Chilcotin	Kootenay Rockies
Base	691-729	569-694	443-529	29-50	42-44	53-71	96-115	118-148	93-117	64-71	65-70
Enhancing public awareness of tourism and its importance to British Columbia	3.7	3.8	3.8	4.4	3.5	3.9	3.8	3.8	3.8	3.6	3.6
Providing tourism-related research and insights	3.7	3.8	3.7	4.3	3.7	4.0	3.8	3.8	3.8	3.5	3.7
Supporting the industry's recovery from the COVID-19 pandemic*	-	3.8	3.7	4.3	4.0	4.0	3.8	3.7	3.7	3.5	3.6
Providing industry leadership in destination marketing	3.8	3.8	3.7	4.3	3.9	4.0	3.8	3.9	3.8	3.5	3.6
Providing quality training and development programs (Tourism Digital Academy, Experience Development, Learning Centre)	3.8	3.7	3.7	4.3	3.6	4.0	3.7	3.8	3.7	3.6	3.5
Providing support for visitor services and centres	3.7	3.8	3.7	4.4	4.0	4.0	3.8	3.7	3.7	3.6	3.7
Regional tourism programs, destination development planning and implementation	3.6	3.5	3.5	4.0	3.5	3.8	3.4	3.6	3.4	3.4	3.5
Creating opportunities for access to shared technology and shared audience data across the BC tourism industry*	-	3.6	3.5	4.1	3.3	3.9	3.5	3.6	3.6	3.3	3.5
Sector/product tourism through Destination BC Co-op Marketing Partnerships Program	3.6	3.6	3.5	3.8	3.8	3.9	3.5	3.6	3.6	3.3	3.5
Community tourism programs (Destination BC Co-op Marketing Partnerships Program, Municipal and Regional District Tax)	3.6	3.5	3.4	**	4.0	3.9	3.4	3.5	3.5	3.2	3.6

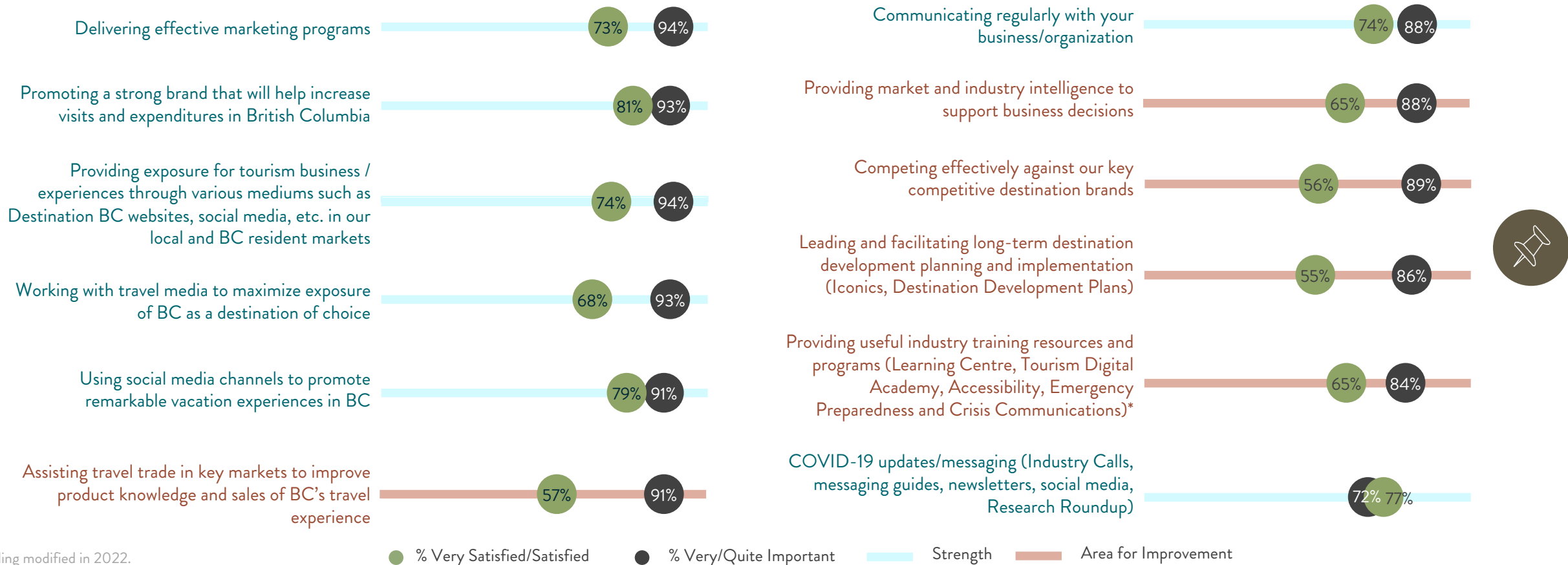


*New questions added this year; **Not displayed due to small base size (n<10)
Q4. Over the past year (April 2021 to March 2022) how would you rate Destination BC's performance on each of the following?

Programs & Service Area: Tourism Businesses

TOURISM BUSINESSES: SATISFACTION & IMPORTANCE OF PROGRAMS & SERVICES PROVIDED

(among respondents who are at least somewhat familiar with Destination BC's programs & services)

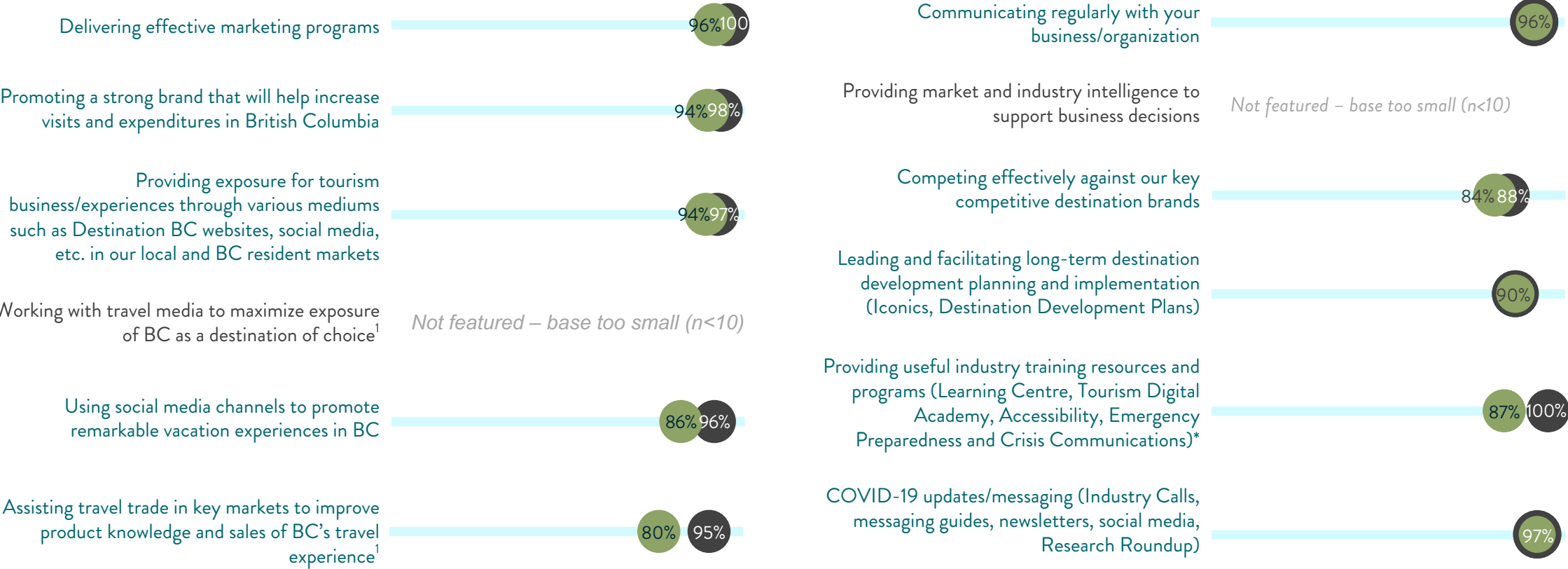


Programs & Service Area: Visitor Centres/Travel Trades



VISITOR CENTRES/ TRAVEL TRADE: SATISFACTION & IMPORTANCE OF PROGRAMS & SERVICES PROVIDED

(among those who are at least somewhat familiar with Destination BC's programs & services)



*Wording modified in 2022. | ¹Caution: small base size (n<30)

Q6 Base: 20-50; Q10 Base: 20-50

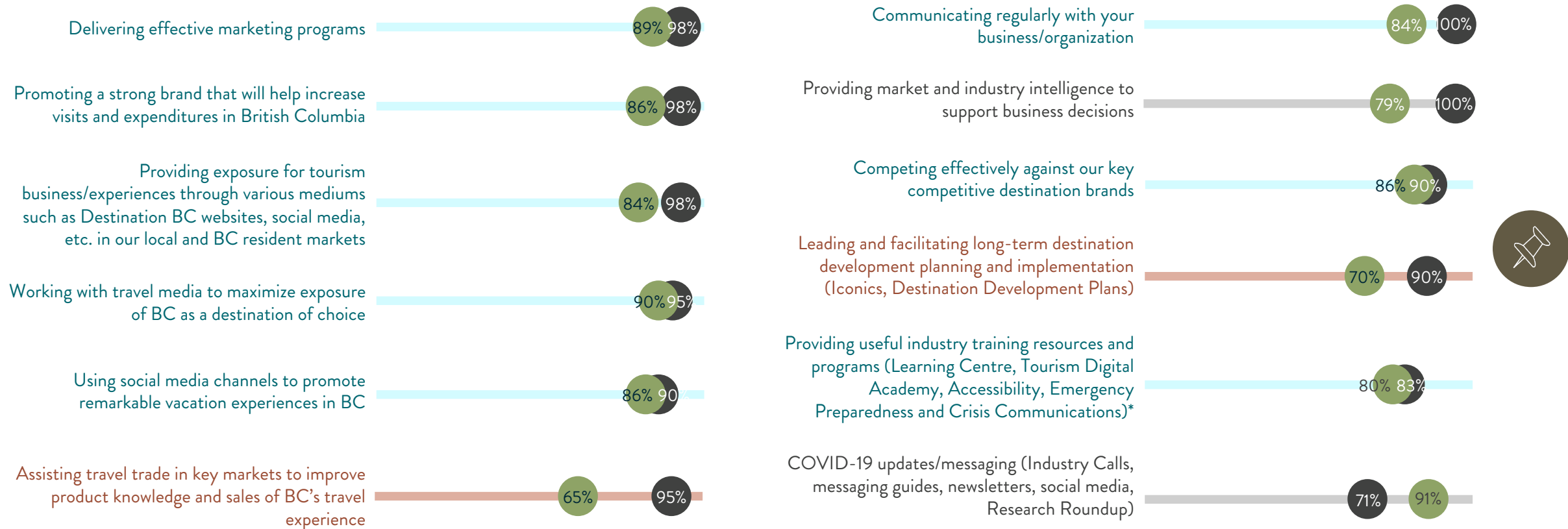
Q6x1/2. Thinking about the past year (April 2021 to March 2022), how satisfied are you with the following Destination BC programs and services?

Q10. Looking forward, how important is it for Destination BC to continue playing a role in the following areas?

Programs & Service Area: DMOs

DMOs: SATISFACTION & IMPORTANCE OF PROGRAMS & SERVICES PROVIDED

(among those who are at least somewhat familiar with destination bc's programs & services)



*Wording modified in 2022.

Q6 Base: 42-44; Q10 Base: 40-42

Q6x1/2. Thinking about the past year (April 2021 to March 2022), how satisfied are you with the following Destination BC programs and services?

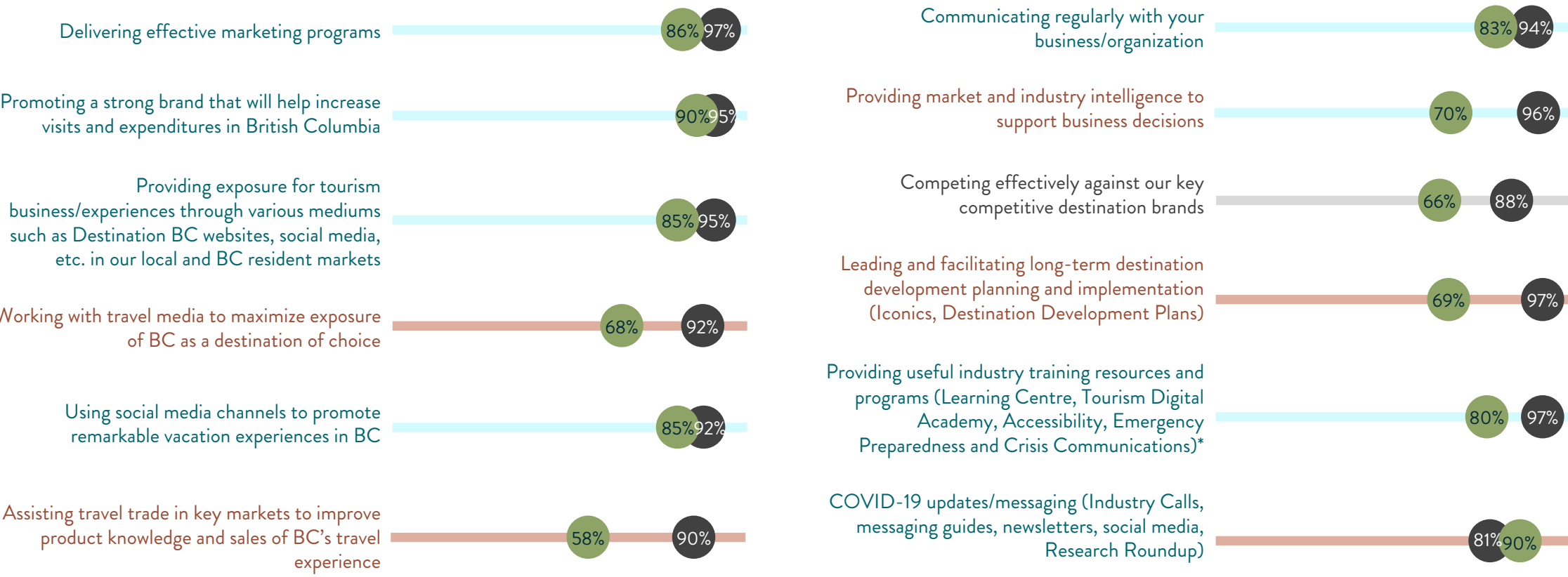
Q10. Looking forward, how important is it for Destination BC to continue playing a role in the following areas?

Programs & Service Area: Tourism Industry Organization



TOURISM INDUSTRY ORGANIZATIONS: SATISFACTION & IMPORTANCE OF PROGRAMS & SERVICES PROVIDED

(among those who are at least somewhat familiar with Destination BC's programs & services)



*Wording modified in 2022.
Q6 Base: 53-71; Q10 Base: 49-64
Q6x1/2. Thinking about the past year (April 2021 to March 2022), how satisfied are you with the following Destination BC programs and services?
Q10. Looking forward, how important is it for Destination BC to continue playing a role in the following areas?

Perceptions and Attitudes: by Strata and by Region



% STRONGLY AGREE / AGREE

(among respondents at least somewhat familiar with Destination BC's programs & services)

	2022 Total	Strata				Region				
		Tourism Businesses	Visitor Centres / Travel Trades	DMOs	Tourism Ind. Org.	Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
Base	605	449	50	42	64	68	76	57	93	130
Provides leadership and direction to the BC tourism industry	85%	83%	98%	93%	91%	86%	82%	81%	80%	84%
Has employees that are respectful	84%	79%	100%	100%	94%	84%	78%	82%	78%	74%
Is focused on <u>programs</u> that align with the needs of the BC tourism industry	80%	77%	96%	86%	89%	82%	83%	74%	64%	77%
Is focused on <u>markets</u> that align with the needs of the BC tourism industry	80%	77%	90%	88%	91%	76%	80%	79%	73%	74%
Has employees who are knowledgeable about market changes and issues impacting tourism	79%	74%	96%	95%	94%	80%	77%	73%	67%	65%
Informs the tourism industry of its corporate strategy and future direction	79%	75%	98%	95%	83%	81%	77%	73%	67%	71%
Collaborates and consults with the tourism industry on key decisions	71%	66%	94%	76%	83%	70%	69%	66%	51%	66%
Provides tools and platforms that assist me to run my business*	68%	63%	98%	79%	75%	65%	63%	61%	64%	63%
Addresses my questions and/or concerns in an effective and timely manner	68%	61%	98%	86%	84%	67%	61%	59%	58%	60%
Is transparent about its corporate performance	60%	57%	74%	79%	64%	59%	62%	58%	45%	53%
Understands my business/organizational needs	60%	53%	94%	69%	72%	59%	54%	53%	53%	42%
Spends funds wisely and responsibly	52%	46%	74%	71%	59%	47%	51%	49%	40%	37%



Perceptions and Attitudes: by Strata and by Region



MEAN SCORES

(among respondents at least somewhat familiar with Destination BC's programs & services)

	2022 Total	Strata				Region				
		Tourism Businesses	Visitor Centres / Travel Trades	DMOs	Tourism Ind. Org.	Vancouver Island	Van. Coast & Mountains	Thompson Okanagan	Kootenay Rockies	Northern BC & Cariboo Chilcotin
Base	605	449	50	42	64	68	76	57	93	130
Provides leadership and direction to the BC tourism industry	4.2	4.1	4.6	4.3	4.3	4.2	4.2	4.2	4.0	4.1
Has employees that are respectful	4.4	4.3	4.8	4.6	4.6	4.3	4.3	4.3	4.3	4.2
Is focused on <u>programs</u> that align with the needs of the BC tourism industry	4.1	4.0	4.4	4.1	4.3	4.1	4.1	4.0	3.9	3.9
Is focused on <u>markets</u> that align with the needs of the BC tourism industry	4.1	4.1	4.4	4.2	4.3	4.0	4.1	4.1	4.0	3.9
Has employees who are knowledgeable about market changes and issues impacting tourism	4.3	4.2	4.7	4.5	4.5	4.2	4.2	4.2	4.0	4.2
Informs the tourism industry of its corporate strategy and future direction	4.1	4.1	4.4	4.4	4.2	4.1	4.2	4.1	3.8	4.1
Collaborates and consults with the tourism industry on key decisions	4.0	4.0	4.3	4.1	4.2	4.0	4.0	4.1	3.6	3.9
Provides tools and platforms that assist me to run my business*	3.9	3.8	4.5	4.2	4.0	3.9	3.7	3.8	3.7	3.7
Addresses my questions and/or concerns in an effective and timely manner	4.1	4.0	4.7	4.3	4.4	4.0	4.0	4.0	4.0	3.9
Is transparent about its corporate performance	4.0	4.0	4.3	4.2	4.1	4.0	4.1	4.1	3.8	3.7
Understands my business/organizational needs	3.7	3.6	4.5	3.9	3.9	3.7	3.7	3.7	3.4	3.3
Spends funds wisely and responsibly	4.0	3.9	4.4	4.1	4.1	3.9	4.0	4.0	3.5	3.7



Q7. Please indicate how much you agree with the following statements? Destination BC...



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