

Summary Report

2017 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 BC tourism industry that Destination BC serves comprises many different stakeholders including: tourism operators, suppliers, media relations representatives, communities, associations, delivery organizations, and regional and community destination marketing organizations.

In spring 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. The 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 *2017 Stakeholder Satisfaction Study* is the fourth annual implementation of the survey.

1.2 Research Objectives

The intent of the *2017 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.
7. Assess stakeholders' current and future needs of Destination BC.

SECTION 2: METHODOLOGY

2.1 Methodology

2.1.1 Scope of Work

Destination BC's *2017 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 *2017 Stakeholder Satisfaction Study* included:

- Destination Marketing Organizations (DMOs), which includes regional, city and community DMOs (CDMOs), and Destination Canada's Vancouver head office
- Tourism industry associations and organizations (previously referred to as primary sector organizations)
- Travel trade and Destination Canada, which includes airlines, North American and overseas tour operators, receptive tour operators, and Destination Canada's overseas offices
- Visitor centres (previously referred to delivery organizations, which included WorldHost® training organizations)
- Media relations representatives (formerly referred to as Travel Media)
- Tourism businesses

Destination BC developed a list of stakeholders included in this survey. 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. 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
- the survey completed by the highest position within the organization
- randomly selected.

A total of six duplicate surveys were removed.

2.1.3 Response Rates

A total of 2,359 stakeholders were asked to complete the *2017 Stakeholder Satisfaction Survey*, of which 965 completed the survey, for an overall response rate of 41%. 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	Total Surveys	Response Rate
Grand Total	2,359	965	41%
DMOs**	101	66	64%
Regional DMOs	5	3	60%
Large CDMOs	6	4	67%
City and Community and DMOs	89	58	65%
Tourism industry associations	29	15	52%
Travel trade and Destination Canada*	148	72	49%
Destination Canada	8	4	50%
Tour operators - key accounts			
North America	13	10	77%
Germany/ United Kingdom	25	17	68%
Asia/ Australia/New Zealand	84	27	33%
Receptive tour operators			
Worldwide	18	14	78%
Visitor centres	112	92	82%
Visitor centres	97	82	85%
Visitor-info booths	15	10	67%
Travel media	57	27	47%
Tourism businesses	1,912	694	36%

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

** One PDMO partner was included in this strata but did not respond to the survey.

Table 2-2 presents the distribution of the tourism business stakeholder population and response rates by region. Quotas were set for a minimum number of survey completions by region, 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	1,912	100%	694	36%	100%
Vancouver Island	433	23%	152	35%	22%
Vancouver Coast and Mountains	491	26%	178	36%	26%
Thompson Okanagan	503	26%	182	36%	26%
Kootenay Rockies	229	12%	80	35%	12%
Cariboo Chilcotin Coast	97	5%	42	43%	6%
Northern British Columbia	149	8%	60	40%	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 (38% in 2016 to 41% in 2017). Notable increases in response rate were achieved for DMOs (43% in 2016 to 64% in 2017) and visitor centres (45% in 2016 to 82% in 2017), although this was, in part, excluding WorldHost training organizations in 2017.

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

Stakeholder strata	2017				
	2015 Response Rate	2016 Response Rate	Population	Survey Completions	Response Rate
All stakeholders	35%	38%	2,359	965	41%
DMOs	50%	43%	101	65	64%
Tourism industry associations	80%	53%	29	15	52%
Travel trade	33%	45%	148	72	49%
Visitor centres	46%	45%	112	92	82%
Travel media	46%	46%	57	27	47%
Tourism businesses	33%	36%	1,912	694	36%

2.2 Level of Familiarity with Destination BC

Table 2-4 presents the levels of respondents' familiarity with services and programs offered by Destination BC. Those who answered, *somewhat familiar*, *familiar*, or *very familiar* completed additional questions evaluating their satisfaction with specific programs/services, communication, and overall satisfaction. Respondents who answered, *not very familiar* or *not familiar at all* were directed 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, 847 (88%) of all respondents were at least *somewhat familiar* with Destination BC's services and programs. Levels of familiarity were generally quite high overall (ranging from 83% to 100% across every strata). Eighty three percent 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?					Overall Familiar (Somewhat + Familiar + Very)	Number Familiar (qualified for evaluation questions)
	Not Familiar at All	Not Very Familiar	Some-what Familiar	Familiar	Very Familiar		
All stakeholders	2%	10%	33%	36%	18%	88%	847
Stakeholder strata							
DMOs	0%	0%	20%	40%	40%	100%	65
Tourism associations	0%	0%	13%	60%	27%	100%	15
Travel trade	1%	0%	15%	47%	36%	99%	71
Visitor centres	0%	0%	22%	40%	38%	100%	92
Travel media	0%	0%	15%	37%	48%	100%	27
Tourism businesses	3%	14%	39%	34%	10%	83%	577
Tourism businesses by region							
Vancouver Island	1%	15%	39%	36%	9%	84%	128
Vancouver Coast and Mountains	3%	17%	32%	38%	10%	80%	143
Thompson Okanagan	4%	12%	41%	31%	13%	85%	154
Northern BC	5%	17%	50%	27%	2%	78%	47
Kootenay Rockies	0%	10%	44%	35%	11%	90%	72
Cariboo Chilcotin Coast	5%	17%	36%	29%	14%	79%	33

Valid n = number of eligible respondents for whom the question was applicable.

SECTION 3: RESULTS

The intent of the *2017 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)
- 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 72% 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 survey results suggest that, taken as a whole, Destination BC's stakeholders see the organization performing positively across all measures, with most mean scores 3.5 or greater. Destination BC is perceived to be performing best in terms of marketing BC to short-haul markets, long-haul markets (Ontario and California), and overseas (mean scores of 3.9, 3.8 and 3.8 respectively) with top two ratings (i.e. rating delivery in this area as very good or excellent) of 57%, 44% and 45%.

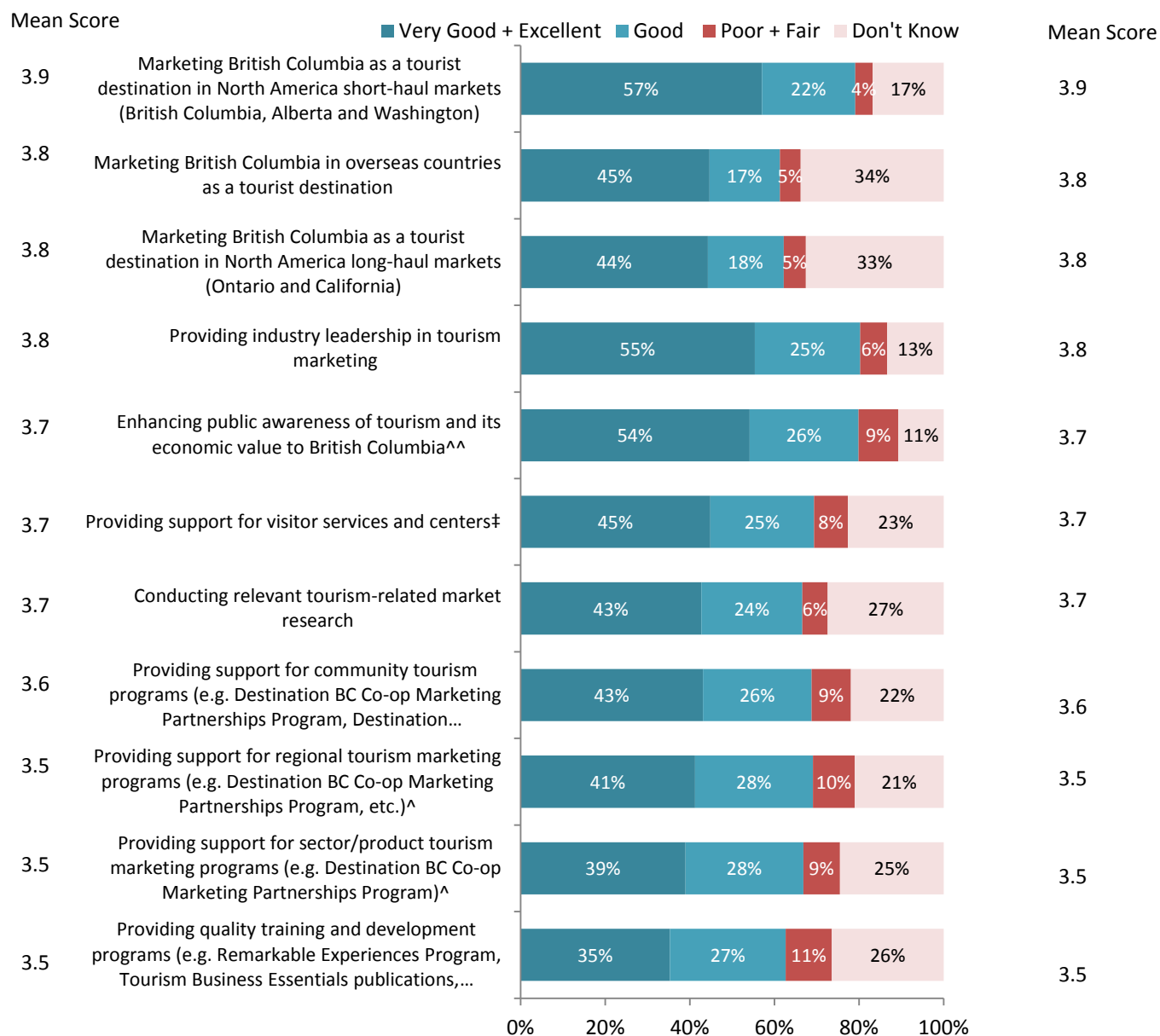
Additionally, more than a half of respondents rated Destination BC's performance as either *very good* or *excellent* for providing industry leadership in tourism marketing (55%), and enhancing public awareness of tourism and its economic value to BC (54%).

The lowest rated performance areas (all with a mean score of 3.5) were: *providing quality training and development programs*; *providing support for sector/product tourism marketing programs*; and *providing support for regional tourism marketing programs*.

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 11% (enhancing public awareness of tourism and its economic value to British Columbia) to 34% (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 Tourism Industry Associations/Organizations; Travel Trade; or Travel Media.

^ not asked of Travel Trade, Visitor Centres or Travel Media

^^ not asked of overseas 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, visitor centres and travel trade generally gave 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	Industry Associations	Travel Trade	Visitor Centres	Travel Media	Tourism Businesses
Marketing British Columbia to short-haul markets	3.9	4.0	4.1	4.1	4.1	4.7	3.8
Marketing British Columbia to North America long-haul markets	3.8	3.9	3.7	3.9	4.1	4.7	3.7
Marketing BC to overseas countries	3.8	3.9	3.9	3.9	4.2	4.6	3.7
Providing support for regional tourism marketing programs	3.5	3.5	3.9	.	.	.	3.5
Providing support for sector/product tourism marketing programs	3.5	3.7	4.0	.	.	.	3.5
Providing support for community tourism programs	3.6	3.5	3.9	.	.	.	3.6
Providing industry leadership in tourism marketing	3.8	3.9	4.1	3.9	4.1	4.6	3.7
Providing quality training and development programs†	3.5	3.5	3.9	4.3	3.7	.	3.4
Providing support for visitor services and centres	3.7	3.6	.	.	4.0	.	3.6
Conducting relevant tourism-related market research	3.7	3.6	3.6	3.8	4.0	4.3	3.6
Enhancing public awareness of tourism and its economic value to British Columbia	3.7	3.6	3.3	4.0	4.0	4.2	3.6

† not asked of Travel Media or Travel Trade (excluding Destination Canada).

‡ not asked of Tourism Industry Associations/Organizations; Travel Trade; or Travel Media.

^ not asked of Travel Trade, Visitor Centres or Travel Media

^^ not asked of overseas Travel Trade

The following table provides a year-over-year comparison of mean scores and toptwo 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). In addition, notable increases in ratings include destination marketing of BC within BC, Alberta, and Washington, 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

Aspect of Legislative Mandate	2014		2015		2016		2017		Percent Change in Mean (2016-2017)
	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)	Mean Score	% Top-Two Positive Ratings (4 or 5)	
Marketing British Columbia to short-haul markets	3.5	36%	3.5	42%	3.8	52%	3.9	57%	+3%
Marketing British Columbia to North America long-haul markets	3.3	26%	3.5	31%	3.7	40%	3.8	44%	+3%
Marketing British Columbia in overseas countries	3.3	24%	3.5	33%	3.7	36%	3.8	45%	+3%
Providing support for regional tourism marketing programs	3.1	23%	3.3	30%	3.5	35%	3.5	41%	0%
Providing support for sector /product marketing programs	3.2	27%	3.3	33%	3.5	41%	3.5	39%	0%
Providing support for community tourism programs	3.2	25%	3.2	28%	3.4	33%	3.6	43%	+6%
Providing industry leadership in tourism marketing	3.3	35%	3.4	41%	3.7	47%	3.8	55%	+3%
Providing quality training and development programs	3.3	32%	3.4	33%	3.5	37%	3.5	35%	0%
Providing support for visitor services and center	3.4	36%	3.4	34%	3.7	45%	3.7	45%	0%
Conducting relevant tourism-related market research	3.3	27%	3.4	34%	3.6	38%	3.7	43%	+3%
Enhancing public awareness of tourism and its value to BC	3.2	33%	3.4	41%	3.6	51%	3.7	54%	+3%

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 1 to 10. Figure 3.2 highlights the distribution of responses for the overall survey result as well as by stakeholder stratum.

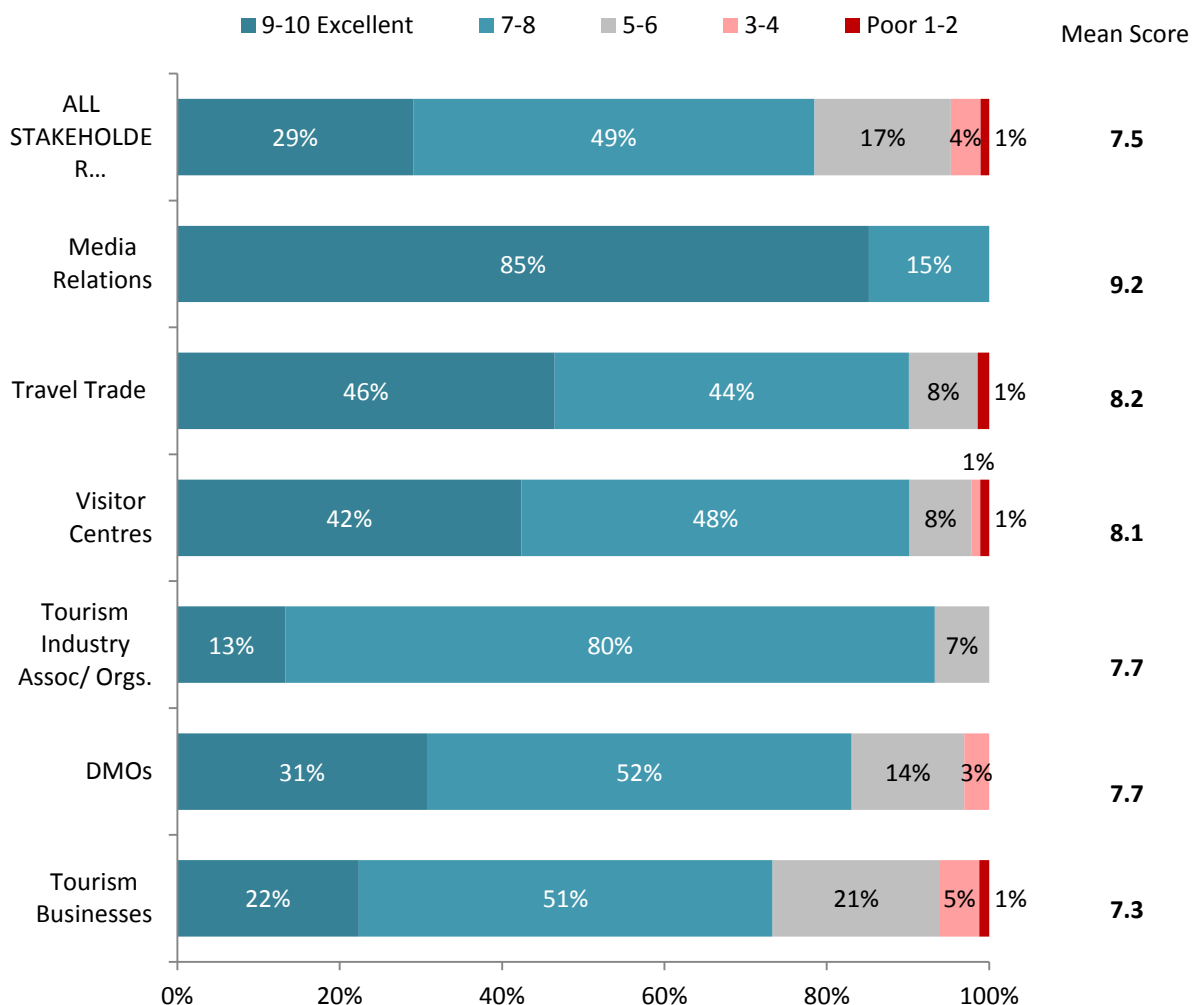
Overall, the average satisfaction score was 7.5, with almost a third (29%) of respondents giving top satisfaction scores (scores of 9 or 10). Satisfaction scores were high across all strata with the majority of respondents in every stratum assigning satisfaction scores of 7 to 10.

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 9 and 10, particularly travel media wherein 85% of respondents gave these top two satisfaction scores. The majority of visitor centres, tourism industry associations and organizations, and DMOs also appear to be relatively satisfied with Destination BC's performance (with mean scores of 8.1, 7.7 and 7.7, respectively).

Tourism businesses ranked satisfaction scores more commonly as *very good* rather than *excellent* (assigning scores of seven to eight most frequently). Despite this slightly lower ranking compared to the other stakeholder groups, the mean score (7.3) remains high for respondents in this group.

Overall satisfaction amongst all stakeholders is generally positive, with 78% of respondents rating their satisfaction from 7 to 10 on the scale.

Figure 3-2: Overall Satisfaction by All Stakeholders and Stratum (ranked by mean score)



n=847

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	7.5	5%	79%
DMOs	7.7	3%	83%
Tourism assoc.	7.7	0%	93%
Travel trade	8.2	1%	90%
Visitor centres	8.1	2%	90%
Travel media	9.2	0%	100%
Tourism businesses	7.3	6%	73%

n=847

Table 3-4 shows a year-over-year comparison of overall satisfaction results by strata and region. DMOs, tourism industry associations, and tourism businesses registered an increase in overall satisfaction (mean scores) in 2017 compared with the previous year, while the level of overall satisfaction remained the same as the previous year for the other three stakeholders groups.

Table 3-4
Overall Satisfaction – Longitudinal Comparison

Stakeholder Stratum	2014		2015		2016		2017		Percent Change in Mean (2016-2017)
	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)	Mean Score	% Top-Four Positive Ratings (7 to 10)	
All Stakeholders	6.5	55%	6.9	66%	7.2	72%	7.5	79%	+4%
DMOs	6.2	46%	6.7	61%	7.3	73%	7.7	83%	+5%
Tourism assoc.	6.9	70%	7.6	92%	7.1	81%	7.7	93%	+8%
Travel trade	8.2	87%	8.0	85%	8.2	85%	8.2	90%	0%
Visitor centres	7.6	78%	7.5	80%	8.1	91%	8.1	90%	0%
Travel media	8.7	97%	8.8	97%	9.2	100%	9.2	100%	0%
Tourism businesses	6.1	46%	6.6	60%	6.9	67%	7.3	73%	+5%

3.2.2 Stakeholder Suggestions for Improving Satisfaction

Survey respondents who scored their overall satisfaction with Destination BC as 8 or less (601 or 71% of all eligible respondents) were asked how their overall satisfaction with Destination BC could be improved. Of these, 284 respondents offered suggestions. Table 3.5 lists the themes identified within these comments.

Comments were grouped into categories with representational overarching themes and each comment was assigned up to two codes. The greatest proportion of comments on suggesting how to improve overall stakeholder satisfaction was *to increase marketing efforts away from the popular destinations (Vancouver, Victoria, Whistler, Okanagan) and direct more marketing efforts to other regions of the province* (14% of the 284 respondents provided a comment on this theme).

Other popular comment themes related to Destination BC providing greater coordination/communication with tourism partners, stakeholders, and communities (11%), and increased interaction and support with smaller markets/operators (11%). The need for Destination BC to continue making its *raison d'être* known to the province was also a common theme with 10% of respondents providing a comment related to benefitting from more awareness of what services and programs are offered by Destination BC. Eight per cent of respondents were interested in improved accessibility to cooperative marketing programs and training opportunities, or changes to application and funding requirements of marketing programs.

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

	% of respondents
Marketing-related	
Increase marketing efforts highlighting smaller regions/decrease focus on popular destinations (i.e., Vancouver, Victoria, Whistler, Okanagan)	14%
Greater accessibility to programs that broaden marketing opportunities (includes co-op marketing, training options, application and funding requirements)	8%
Increase and communicate marketing strategies to stakeholders and industry partners	6%
Promote/focus on specific sectors and attractions	6%
Increase marketing efforts internationally (North America and overseas)	4%
Increase online marketing efforts (includes social media marketing)	3%
Other promotion, marketing or advertising comments/suggestions	13%
Other Themes	
Greater coordination/communication with tourism partners, stakeholders, and communities	11%
Increase interaction and support with smaller markets/operators	11%
Increase awareness of Destination BC services and programs/ increased communication on what services and programs are offered by DBC	10%
Increase funding/improved allocation of funding resources/reduce fees	6%
Happy with most services	5%
Improve/update/enhance functionality of Destination BC website	4%
Increased support/resources/funding for Visitor Centres	2%
Other – general or unique response	14%

n=284; Note: Individual responses add to greater than 100% due to multiple-coded responses

3.2.3 Stakeholder Views on Destination BC's Most Important Role

All stakeholders who completed the survey online (telephone respondents were excluded), were asked to express, their opinion on Destination BC's most important role in supporting tourism in BC. There were five hundred fourteen responses recorded. Themes identified in the responses are summarized in Table 3.6.

Table 3.6 further divides response categories into those related to marketing and those related to other themes. One in five responses regarding Destination BC's most important role in supporting tourism in BC relates to the marketing of BC as a destination (20%).

Additional popular responses were related to providing marketing support and making available marketing resources and information (13%); and the promotion of BC to other countries/overseas (9%). Improving online content/promoting via social media channels; promoting the entire province (not just specific centres); and communicating with stakeholders regarding tourism/marketing initiatives each garnered 7% of responses. Popular responses in "other themes" centred on providing increased support for small business/small areas (9%); increased collaboration among the provincial tourism network (9%); and comments related to satisfaction with Destination BC's current activities/role (6%).

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	20%
Provide support and make available marketing resources/information	13%
Promotion to other countries/overseas	9%
Improve online content and promote using social media channels (includes comments related to HelloBC website content)	7%
Promote whole province (not just specific centres)	7%
Communicate with stakeholders regarding tourism/marketing initiatives	7%
Promote specialized groups/sectors	6%
Branding/reinforcement of brand	6%
Increase media presence (coordinate press visits and interviews - does not include social media)	5%
Other promotion/marketing/advertising	4%
Other themes	
Provide increased support for small areas/small businesses	9%
Increase collaboration among provincial tourism network/build provincial tourism network	9%
Satisfied with current activities/role of Destination BC	6%
Keep Visitor Centres open/increase funding for Visitor Centres	4%
Other – general or unique response	8%

n= 514; Individual responses add to greater than 100% due to multiple responses

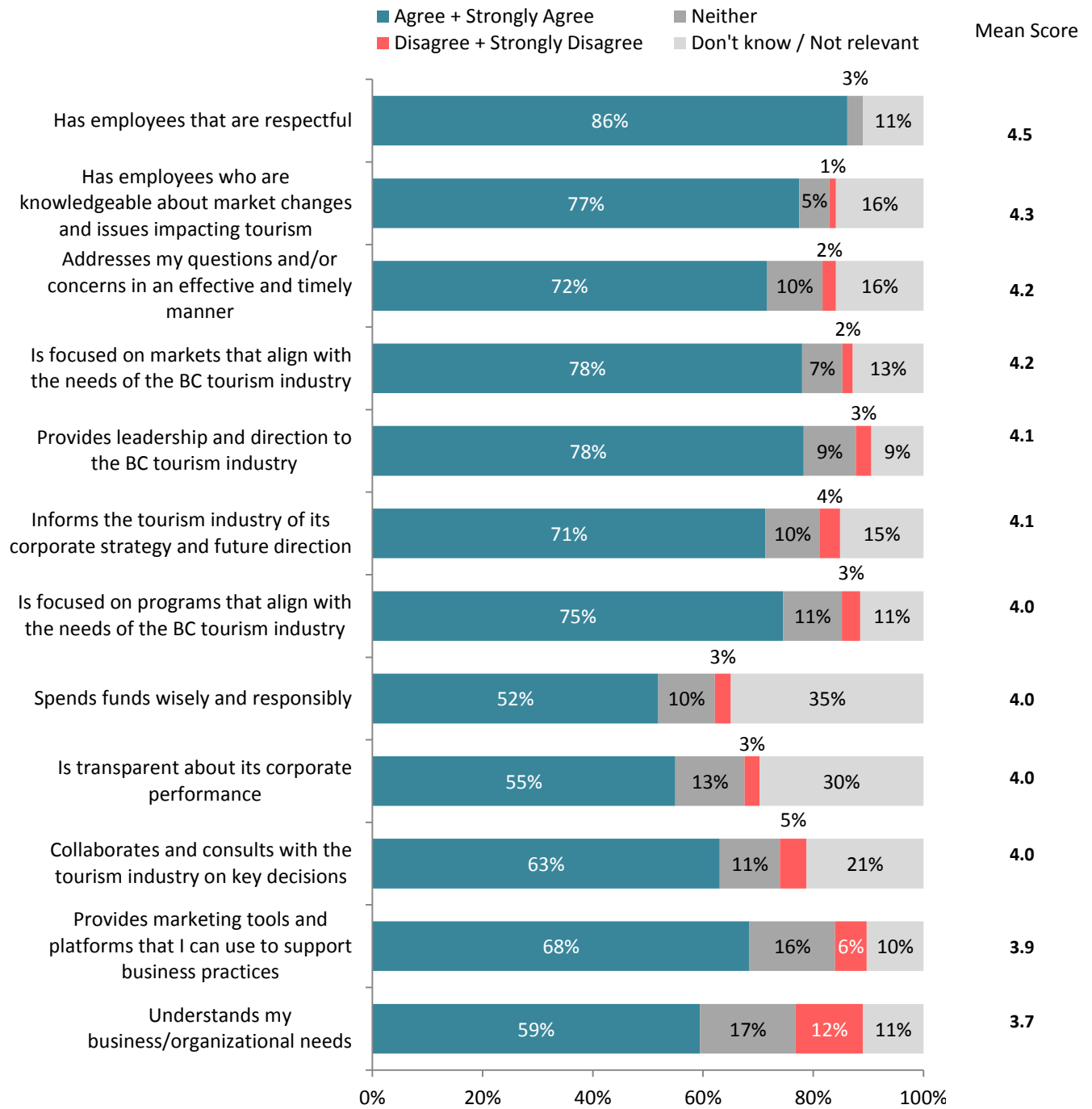
3.3 Perceptions and Attitudes

3.3.1 Overall Perceptions and Attitudes – All Stakeholders

Stakeholders were asked to provide their level of agreement with a series of statements about Destination BC. Similar to 2016, the results indicate that stakeholders have positive opinions of Destination BC's employees, including their respectfulness (mean score of 4.5) and their knowledge about market changes and issues impacting tourism (mean score of 4.3). However, the results suggest stakeholders perceive a number of areas of concern. Half of respondents agreed that the organization spends funds wisely and responsibly (52% either agreed or strongly agreed). Other areas of possible concern include: *providing useful marketing tools and technologies* (agreement score of 68% but second lowest mean of 3.9), and *understanding my business/organizational needs* (lowest mean score of 3.7).

The greatest percentage of *don't know/not relevant* responses were in the categories of spending (35% reported don't know/not relevant) and in being transparent about performance (30% reported *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 12% noting disagreement or strong disagreement.

Figure 3-3: Perceptions and Attitudes – All Stakeholders



n=746 to 751

3.3.2 Perceptions and Attitudes by Stakeholder Stratum

In reviewing the proportions that *agreed* or *strongly agreed* in Table 3-7, readers are reminded that respondents may have indicated *don't know/not relevant*. For example, 60% of travel media respondents indicated *don't know/not relevant* regarding Destination BC's collaboration and consultation with the tourism industry on key decisions; the remaining 40% *agree* or *strongly agree* with this statement. Other measures with higher levels of *don't know/not relevant* responses include questions regarding whether Destination BC spends funds wisely (35%), transparency with respect to performance (30% overall), and whether Destination BC collaborates and consults with the tourism industry on key decisions (21% overall).

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

	All Stakeholders	DMOs	Tourism Assoc.	Travel Trade	Visitor Centres	Travel Media	Tourism Businesses
Has employees that are respectful	86%	97%	100%	98%	97%	100%	80%
Collaborates and consults with the tourism industry on key decisions	63%	73%	93%	77%	69%	40%	59%
Addresses my questions and/or concerns in an effective and timely manner	72%	82%	87%	86%	91%	96%	63%
Is transparent about its corporate performance	55%	69%	100%	58%	72%	44%	49%
Has employees who are knowledgeable about market changes and issues impacting tourism	77%	90%	100%	97%	85%	84%	71%
Provides leadership and direction to tourism industry	78%	87%	100%	82%	88%	68%	75%
Informs the tourism industry of its corporate strategy and future direction	71%	87%	93%	79%	85%	36%	67%
Is focused on markets that align with the needs of the BC tourism industry	78%	89%	93%	85%	82%	68%	75%
Is focused on programs that align with the needs of the BC tourism industry	75%	81%	80%	79%	78%	68%	73%
Spends funds wisely and responsibly	52%	68%	80%	76%	63%	44%	44%
Understands my business/organizational needs	59%	57%	73%	92%	69%	92%	52%
Provides marketing tools/platforms that I can use to support business practices	68%	71%	80%	85%	80%	60%	64%

3.4 Rating of BC's Tourism Industry Collaboration and Alignment

Respondents 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, revised for clarity which included an introductory definition.

The following table outlines the key results by strata. The travel media stratum provided a very high rating, with 89% of respondents assigning a ranking of 7-10, and no respondents providing low ratings of 1-4. Tourism industry associations were more divided in their ratings of collaboration and alignment, with 27% of respondents providing lower ratings of 1-4 and 53% assigning rankings of 7-10. The rating of tourism industry collaboration and alignment increased in 2017 for most strata.

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

	Mean Score 2016	Mean Score 2017	% Low Rating (1-4)	% High Rating (7-10)
All Stakeholders	6.5	6.8	10%	61%
DMOs	6.6	6.9	9%	63%
Tourism industry associations	5.5	6.3	27%	53%
Travel trade	8.3	8.0	1%	85%
Visitor centres	7.1	7.5	2%	77%
Travel media	8.6	8.4	0%	89%
Tourism businesses	6.2	6.5	12%	55%

Stakeholders provided feedback on what single most important action Destination BC could take to increase collaboration and alignment in BC's tourism industry. Presented in Table 3.18 below are the coded themes from stakeholders' open-ended responses with respect to this question.

Comments were grouped into categories with representational overarching themes and each comment was assigned up to two codes. Table 3.9 further divides response categories into those related to marketing and those related to other themes. *Greater communication with stakeholders and/or between industry partners* was the most commonly noted theme by stakeholders (14%) 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* categories included: hosting more conferences, workshops, seminars and/or events with stakeholders (12%), and being happy with Destination BC's current direction (9%). Of the marketing-related comments, fostering greater collaboration and alignment with regions/sectors was the most frequently mentioned theme (11%) followed by more advertising/increased marketing efforts (provincially, nationally and internationally) (9%), and emphasizing collaborative marketing strategies (8%).

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	
Greater collaboration and alignment with regions/sectors	11%
More advertising/increased marketing efforts (provincially, nationally and internationally)	9%
Emphasize collaborative marketing strategies	8%
Market BC as a whole /less focus on popular BC destinations	7%
More online advertising/marketing (includes social media)	3%
Other promotion/marketing/advertising	5%
Other Themes	
Greater communication with stakeholders and/or between industry partners	14%
Host more conferences/workshops/seminars/events with stakeholders	12%
Happy with Destination BC's current direction	9%
Greater support for small businesses/small communities	6%
Emphasize role of Destination BC/increase awareness of Destination BC services	4%
Incorporate stakeholder feedback to decision making processes	4%
Increase face-to-face interaction	4%
Encourage government to recognize tourism issues/increase government lobbying efforts	3%
Other general or unique response	12%

n=504; individual percentages may sum to greater than 100% due to multiple-coded responses

3.5 **Additional Comments**

At the conclusion of the survey, all respondents were given the opportunity to provide further comments. Of the 965 eligible respondents (online and telephone completions), 198 (21%) volunteered additional comments. Nearly half of those responding (46%) affirmed their general satisfaction— even extreme satisfaction— with Destination BC and/or its programs/services. Eleven per cent of respondents suggested that Destination BC needs to increase the effectiveness of aspects of its marketing, and ten per cent of comments reflected the theme of greater support needed for small businesses or small and/or rural areas. Other comments were varied and are presented in Table 3.10

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

	% of respondents
Generally to extremely satisfied with Destination BC organization/ services	46%
Market the province/sector/product more effectively	11%
Greater support for small business/small areas/rural areas	10%
More assistance/information/training desired	7%
Greater online focus/efforts needed (includes website and online marketing improvements)	7%
Greater communication needed	7%
Dissatisfaction with Destination BC	3%
Other - unique or general comment	20%

n=198; Individual responses add to greater than 100% due to multiple responses

3.6 Demographics and Firmographics

All respondents were asked to provide demographics and firmographics. Respondents who indicated they were not familiar with Destination BC were directed to this section directly after question 3 (level of familiarity), while all other respondents completed this section after completing the evaluation questions. Respondents from tourism businesses were asked about their type of business, years in the industry, and number of employees. All respondents were asked about their job title.

3.6.1 Firmographics of Tourism Businesses

As illustrated in Figure 3-5, nearly half of tourism businesses surveyed were accommodations operations (49%). Table 3.19 shows type of operation by region. Of note, respondents from the Kootenay Rockies region had the highest proportion of accommodation businesses, at almost sixty-nine percent of businesses surveyed in this region.

Figure 3-5: Which of the following best describes your organization's type of operation? (n=694)

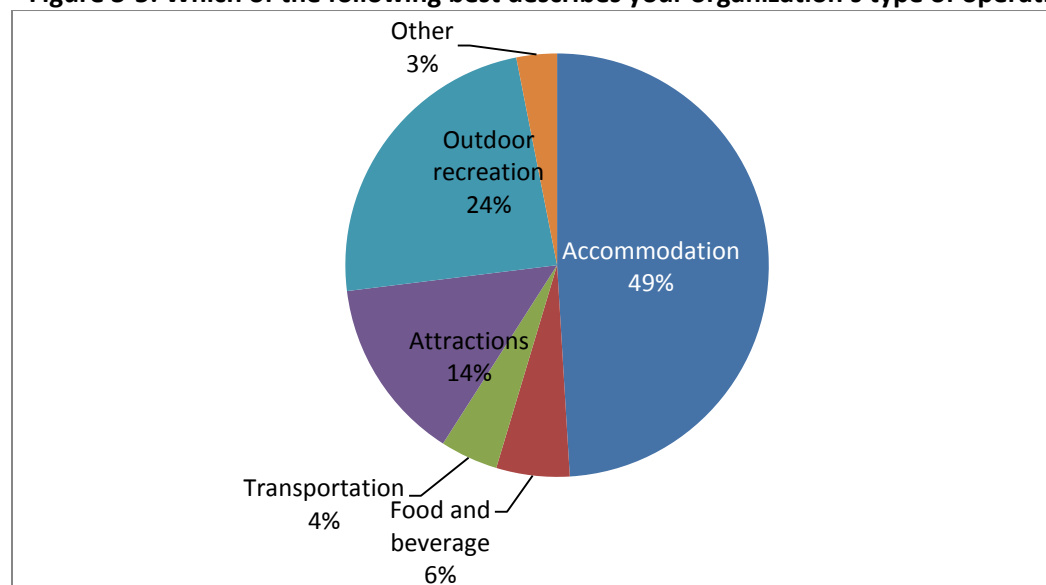


Table 3-11 Type of Operation by Region

	All Tourism Businesses	Vancouver Island	Vancouver Coast and Mountains	Thompson Okanagan	Northern British Columbia	Kootenay Rockies	Cariboo Chilcotin Coast
Accommodation	49%	49%	41%	47%	48%	69%	65%
Food and beverage	6%	5%	1%	15%	3%	0%	3%
Transportation	4%	6%	8%	1%	1%	5%	3%
Attractions	14%	10%	17%	18%	11%	7%	12%
Outdoor recreation	24%	28%	31%	15%	33%	17%	13%
Other	3%	3%	3%	3%	4%	2%	3%
Total	100%	100%	100%	100%	100%	100%	100%

n=679

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.

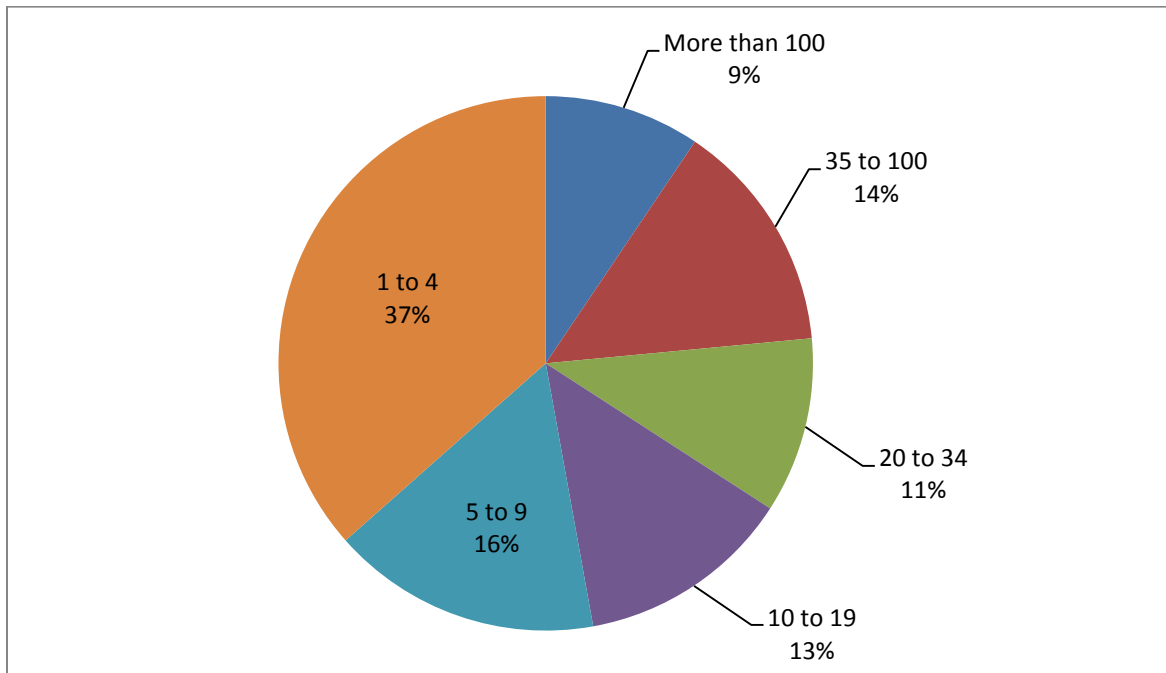
Table 3-12 Years Involved in the Tourism Industry

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

n=655

Sixty six per cent of tourism businesses have less than 20 employees during peak season, and 37% had fewer than five during this time. Nine percent of tourism businesses in BC are large businesses with more than 100 employees at their peak operating season. Figure 3.6 provides a breakdown by industry size.

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



n=668

SECTION 4: APPENDIX

4.1 Additional Methodological Details

4.1.1 Survey Development

The survey was developed by Destination BC, with input from R.A. Malatest & Associates Ltd.. 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)

R.A. Malatest & Associates Ltd. updated the programming with slight revisions proposed by Destination BC. Email invitations were also developed in consultation with Destination BC.

4.1.2 Survey Administration

A soft launch of the survey was undertaken on Tuesday, April 18, 2017 and the full survey administration launch was approved to go ahead on Wednesday, April 19 with an email invitation sent to all stakeholders. Five reminder e-mails were sent out during survey administration. The final e-mail invitation was sent on Monday, May 15 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 inquiries 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 1 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. The overall response rate increased from 17% to 41% (575 additional survey completions) as a result of the extension of the online deadline and subsequent telephone follow-up. The survey was shortened for those respondents who completed over the telephone in order to reduce response burden.

4.1.3 Data Analysis and Reporting

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

All scale questions used five ordinals (i.e., scale of 1 to 5), with the exception of the overall satisfaction question and tourism industry collaboration and alignment, which both used ten

ordinals (i.e., scale of 1 to 10). 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 (4 or 5, e.g., *very good* or *excellent*) or bottom two negative ratings (1 or 2, e.g., *poor* or *fair*).