

Summary Report 2018 Stakeholder Satisfaction Survey

Prepared for: Destination British Columbia

Prepared by: Sentis Market Research

January, 2019



Contents

Section 1. Introduction.....	3
Background.....	4
Objectives	4
Section 2. Methodology.....	5
Scope of Work.....	6
Stakeholder Population.....	6
Response Rates.....	7
Demographics and Firmographics.....	11
Level of Familiarity with Destination BC.....	12
Section 3. Results.....	15
Delivering on Legislative Mandate.....	17
Overall Satisfaction with Destination BC.....	22
Perceptions and Attitudes.....	28
BC Tourism Industry Collaboration and Alignment....	32

Section 1: Introduction



Background and Objectives

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. 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 2018, Destination BC commissioned Sentis to conduct the Stakeholder Satisfaction Survey. The survey is conducted annually, starting in 2014. Sentis was responsible for reviewing and refreshing the questionnaire design, data collection, analysis and reporting.

Objectives

- 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 areas:
 - Performance on delivering on corporate mandate
 - Stakeholder's familiarity and satisfaction with the services and programs provided by Destination BC
 - Destination BC's communications, service, and delivery of services and programs
 - Stakeholders' perceptions and attitudes towards Destination BC
 - Perceived level of collaboration and alignment

Section 2. Methodology



Methodology

Scope of Work

- The Destination BC 2018 Stakeholder Satisfaction Study was conducted by Sentis Market Research (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; and
 - Delivery of a final report.

Stakeholder Population

The stakeholder population frame for the 2018 Stakeholder Satisfaction Study included stakeholder organizations from the following strata:

- Destination Marketing Organizations, which includes region, city and community DMOs;
- Tourism Industry Associations and Organizations (formerly referred to as Primary Sector Organizations);
- Travel Trade and Destination Canada, which includes North American and overseas tour operators, receptive tour operators and Destination Canada's overseas offices;
- Visitor Centres;
- Media Relations;
- Tourism Businesses.



Methodology

- For Tourism Businesses, Destination BC provided Sentis with a separate contact list that included participants in [HelloBC Listings Program](#) and/or the Remarkable Experiences Program.
- To ensure the correct contact was included in the survey, prior to survey administration, Destination BC sent an initial e-mail to all participants introducing the survey and ensuring the correct contact was included.

Response Rates

- A total of 2,664 contacts were invited, by email, to participate in the online survey. The online survey was programmed and hosted by Sentis.
- To encourage participation, reminder emails were sent approximately one week after the initial email invite to those who had not responded to the survey. Sentis reviewed the response rate with Destination BC five days after the first reminder email, and a decision was made to extend the data collection window and implement the following steps, in the order listed, to maximize the survey response rate:
 1. Initiate phone reminders to those who have yet to respond to the survey after the first email reminder prompt. All phone numbers were dialed up to a maximum of 6 call attempts.
 2. A second email reminder was initiated to all non-responders after the phone reminder prompt.
 3. A third email reminder was initiated to all non-responders.
 4. Finally, Sentis conducted targeted telephone follow-ups with non-responders that had previously indicated interest in the survey during the phone reminders. During the telephone follow-ups, participants were provided with the option to complete a shorter version of the survey by phone.



Methodology

- As in previous years, responses were reviewed at the data processing stage to ensure that there was only 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 were retained and included in the final data set.
- Sentis also 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, no further weighting was required.
- Overall, a total of 556 individuals completed the survey between April 20th and June 19th, 2018.
- Where applicable, the 2018 report evaluates performance and ratings 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 switch to focus on top 2 or top 4 box ratings were 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
 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. As an example, it is important to note that a significant percentage of stakeholders are unable to rate Destination BC's performance on a number of its legislated mandates.
- Note: The following abbreviations are used throughout this report:

DMO	Destination Marketing Organizations	NBC	Northern British Columbia
DC	Destination Canada	VI	Vancouver Island
VCM	Vancouver, Coast and Mountains	KR	Kootenay Rockies
TO	Thompson Okanagan	CCC	Cariboo Chilcotin Coast



Response Rate: by Strata

Strata	Invited	Total Completes	Response Rate
DMOs	103	47	46%
<i>Regional DMOs</i>	5	2	40%
<i>Community and City DMOs</i>	91	41	45%
<i>First Tier DMO</i>	6	4	67%
<i>PDMO</i>	1	-	0%
Tourism Associations/Organizations	33	12	36%
Travel Trade and Destination Canada	138	56	41%
<i>Travel Trade North America</i>	7	4	57%
<i>Travel Trade Asia Pacific</i>	76	18	24%
<i>Travel Trade Europe</i>	28	18	64%
<i>Destination Canada</i>	8	4	50%
<i>Receptive Tour Operators</i>	19	12	63%
Visitor Centres	117	60	51%
Media Relations	94	20	21%
Tourism Businesses	2,179	361	17%
Grand Total	2,664	556	21%



Response Rate: by Region (Tourism Businesses Only)

Region	Invited	Total Completes	Response Rate
Vancouver Island	513	81	16%
Vancouver, Coast and Mountains	684	112	16%
Thompson Okanagan	506	71	14%
Kootenay Rockies	214	44	21%
Cariboo Chilcotin Coast	91	16	18%
Northern BC	171	36	21%
Total	2,179	361	17%

Tourism Business: Firmographics

	Total	Number of Tourism Business by Region					
		VCM	TO	NBC	VI	KR	CCC
<i>Base</i>	361	112	71	36	81	44	16*
Sector							
Accommodation	52	42	49	58	49	66	88
Food and beverage	21	25	25	17	16	18	19
Transportation	7	11	4	8	7	2	6
Attractions	25	31	18	22	30	16	25
Outdoor recreation	27	29	18	19	28	32	50
Other	19	19	25	22	20	7	19
Years in Operation							
Average (years)	26	28	22	25	28	21	33
Size (no. of employees)							
1 to 4	34	28	31	42	30	41	75
5 to 9	10	7	11	8	14	14	-
10 to 34	23	25	23	36	22	18	13
35 to 100	16	20	14	11	16	16	6
More than 100	15	21	17	3	16	11	-
Unsure/DK	1	-	3	-	2	-	6

*Caution: Small Base Size
Q15, Q16, Q17

Familiarity with Destination BC's Programs and Services

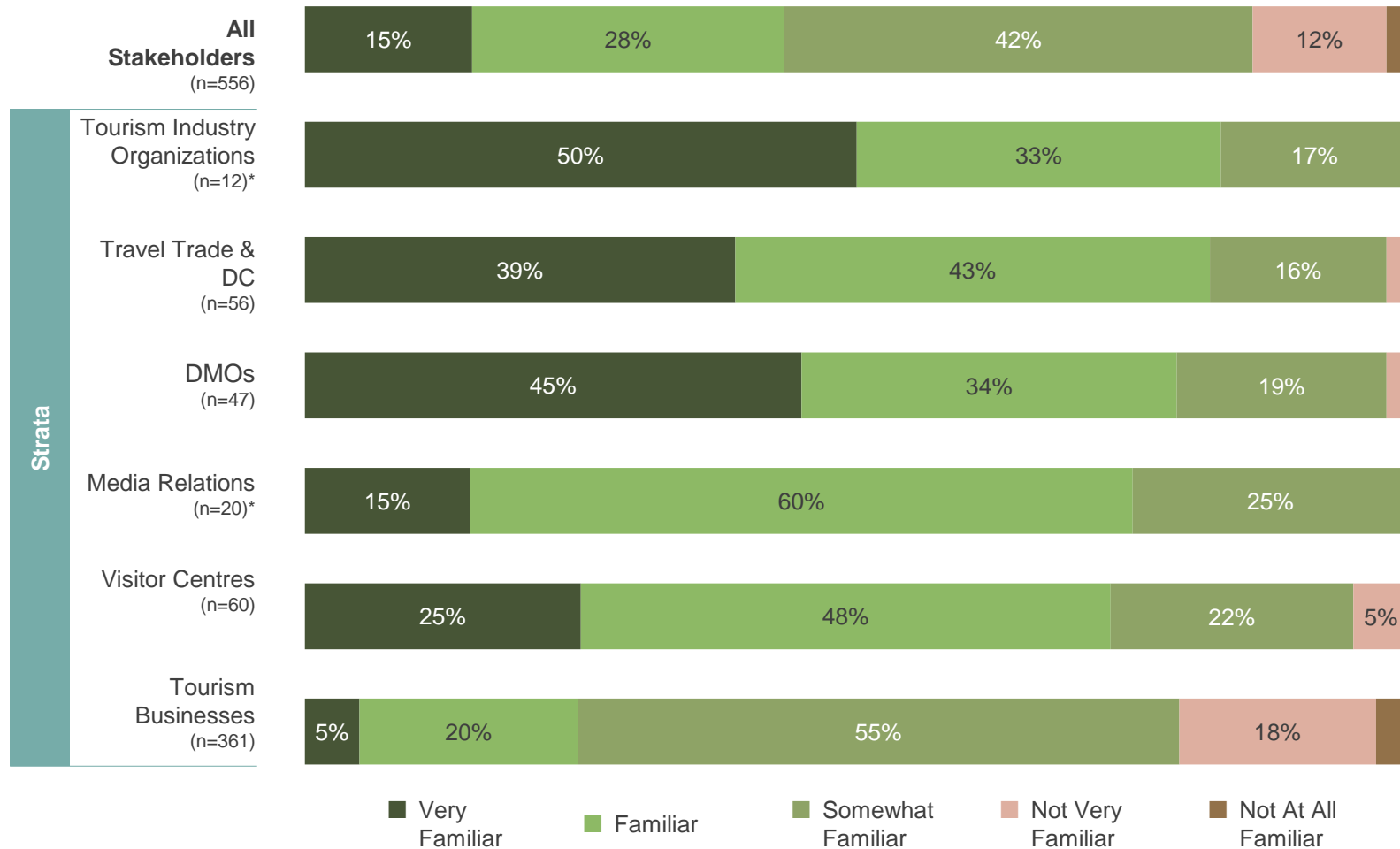
Overall Familiarity

- Respondents were asked how familiar they were with services and programs offered by Destination BC. Those respondents who answered somewhat familiar, familiar or very familiar went on to complete additional questions evaluating their satisfaction with specific programs/services, communication and overall satisfaction. Those respondents who answered not very familiar or not familiar at all were skipped to the demographics section and conclusion of the survey. Those unfamiliar with Destination BC might not be expected to have sufficient understanding of the organization's activities to hold an informed opinion.
- Consistent with surveys from previous years, the vast majority of stakeholders (85%) say they are at least somewhat familiar with Destination BC's programs and services. However, only 43% indicate that they are either 'familiar' or 'very familiar' with Destination BC's programs and services.
- Familiarity with Destination BC's programs and services differs markedly by strata. Stakeholders in Tourism Industry Organizations, Travel Trade & Destination Canada and DMOs express the highest degree of familiarity with Destination BC's programs and services, followed by Visitor Centres and Media Relations.
- Tourism Businesses express the lowest degree of familiarity with Destination BC's programs and services – only 25% indicate that they are either 'familiar' or 'very familiar' with Destination BC's services and programs. Given that Tourism Businesses represent 65% of tourism stakeholders, increasing overall familiarity with Destination BC's program and services depends on further educating tourism businesses regarding the programs and services that Destination BC offers.
- Familiarity with Destination BC's programs and services varies across regions. Thompson Okanagan and Cariboo Chilcotin Coast tourism businesses express higher degrees of familiarity than tourism businesses in other regions.

Overall Familiarity: Longitudinal Comparison

- By strata - Overall familiarity has remained relatively stable in comparison to 2017 across all strata groups.
- By regions - With the exceptions of Vancouver, Coast and Mountains (where familiarity is unchanged) and Cariboo Chilcotin Coast (where familiarity has strengthened), familiarity has softened from 2017 levels in all other regions.

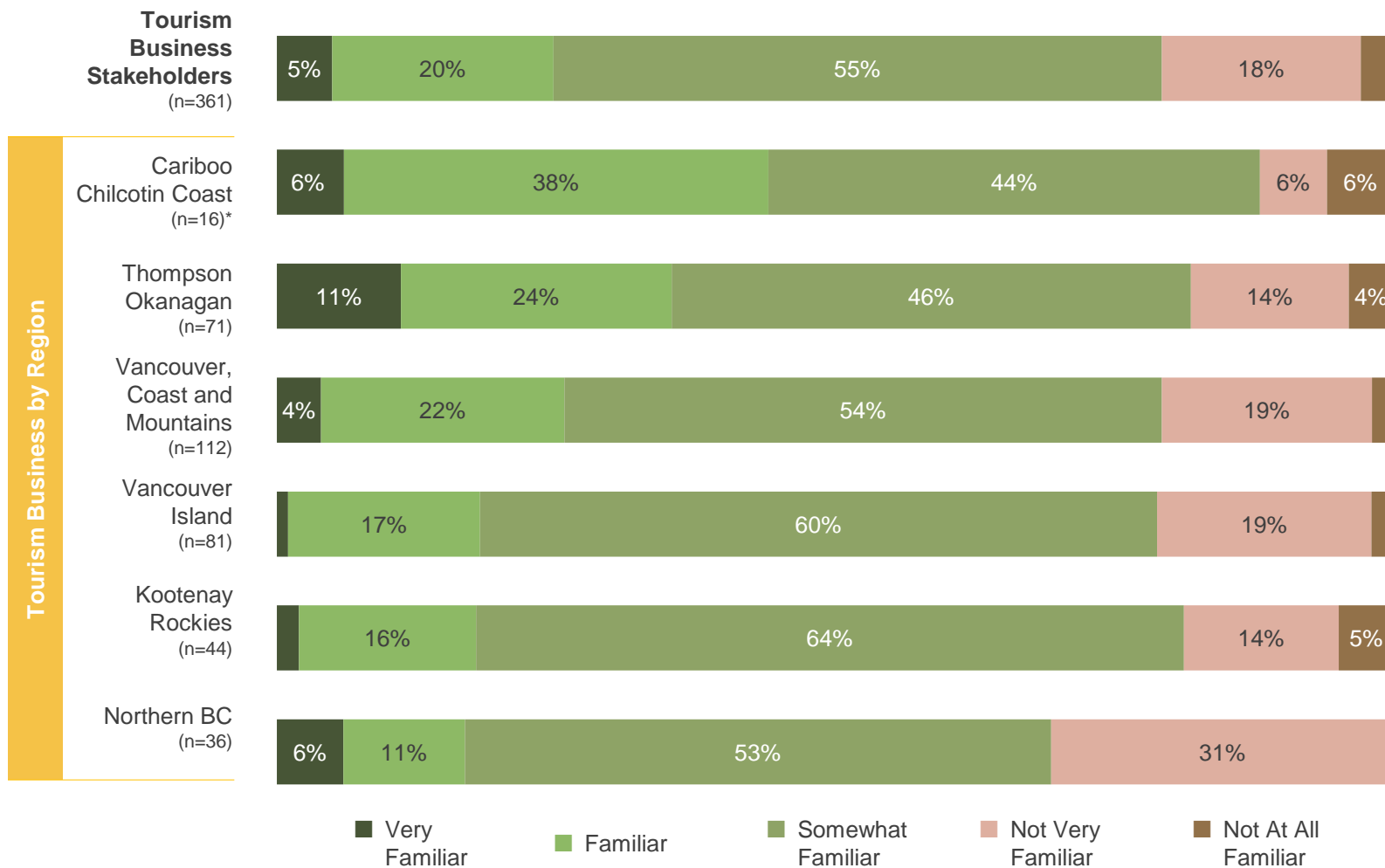
Familiarity with Destination BC's Programs and Services: By Strata



*Caution: Small base size

Q3. How familiar are you with the services and programs offered by Destination BC?

Familiarity with Destination BC's Programs and Services: By Region (Tourism Businesses Only)



*Caution: Small base size

Q3. How familiar are you with the services and programs offered by Destination BC?

Section 3. Results

Results

- The intent of the 2018 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;
 - Overall satisfaction with Destination BC;
 - Perceptions of and attitudes towards Destination BC;
 - Rating of tourism industry collaboration and alignment;
 - Additional comments about Destination BC volunteered by respondents; and
 - Demographics and firmographics of stakeholder organizations.

Delivering on Legislative Mandate

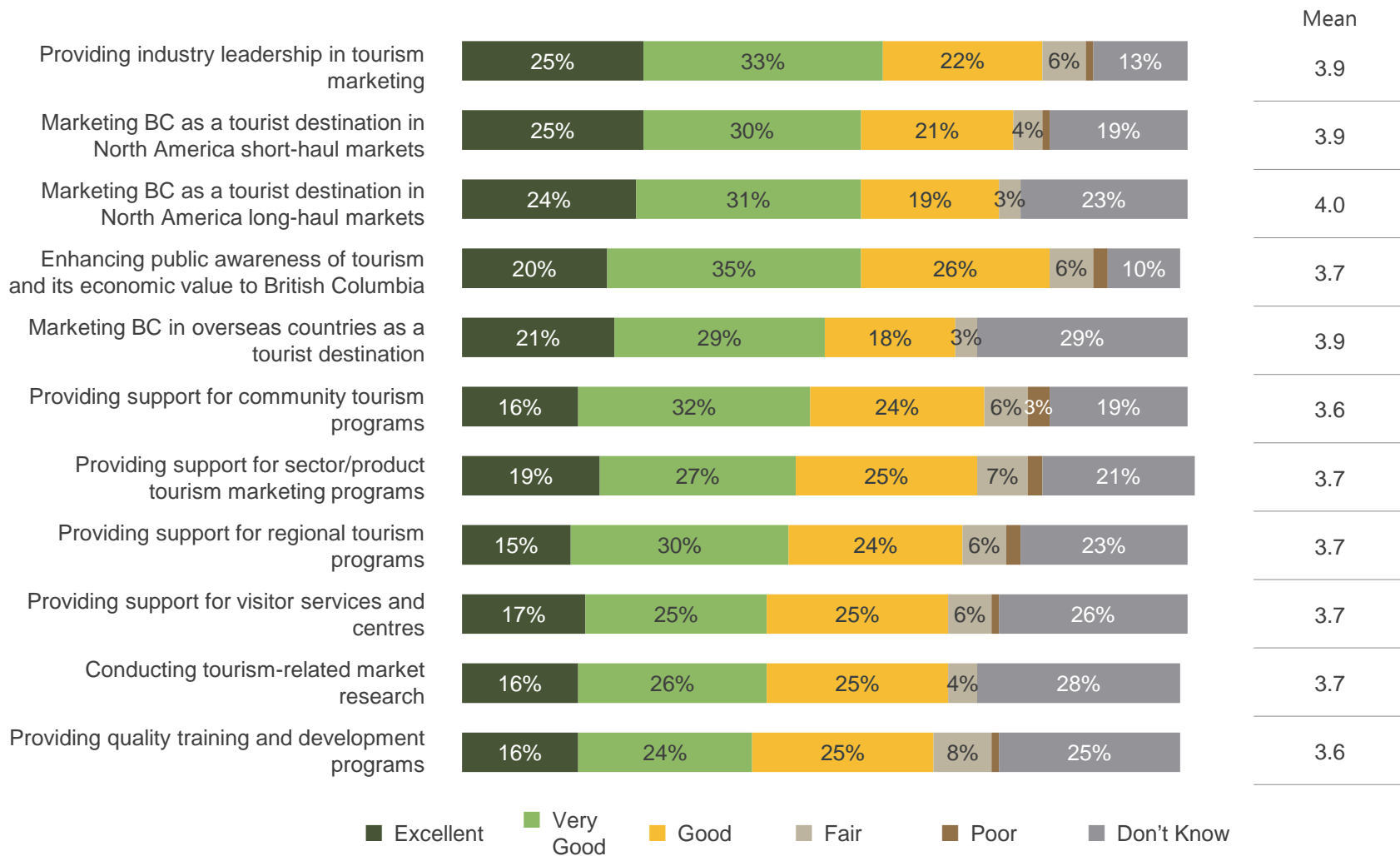
Delivering on Legislative Mandate: All Stakeholders

- The 2018 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).
- Stakeholders give Destination BC the strongest ratings in marketing and communications – whether it be providing leadership in tourism marketing, marketing BC as a tourist destination across markets or communicating with the public about the economic value of tourism for British Columbia. Broadly one-half give ratings of 'excellent' or 'very good' for each of these attributes.
- Stakeholders give somewhat lower ratings to Destination BC when it comes to supporting stakeholders achieve their tourism goals and objectives. This includes providing support for community, regional and sector/product tourism programs, conducting tourism-related market research, and providing quality training and development programs.

Delivering on Legislative Mandate: Strata

- Media Relations stakeholders gave Destination BC higher ratings than other stakeholders for Destination BC's efforts to market BC as a tourism destination and enhancing public awareness of the economic value of tourism to BC.
- Compared to other strata, Tourism Businesses give Destination BC somewhat lower ratings for marketing BC in North America short-haul markets, enhancing public awareness of the economic value of tourism in BC, providing support for visitor services and centres, providing support for regional/community tourism programs, and providing quality training and development programs.
- Similar to Tourism Businesses, DMOs also give somewhat lower ratings for enhancing public awareness of the economic value of tourism in BC, providing support for visitor services and centres, and providing quality training and development programs.

Delivering on Legislative Mandate: All Stakeholders



Base: 437-569

Q4. Over the past year (April 2017 to March 2018) how would you rate Destination BC's performance on each of the following?

Delivering on Legislative Mandate: by Strata

	Mean Score						
	Total	Strata					
		Tour. Bus.	Visitor Centres	T.Trade & DC	DMOs	Tour. Ind. Org.	Media Rel.
<i>Base</i>	345-477	287	57	55	46	12*	20*
Marketing BC in North America long-haul markets	4.0	3.9	4.2	4.0	4.1	3.8	4.6
Providing industry leadership in tourism marketing	3.9	3.7	4.1	4.1	3.9	4.0	4.8
Marketing BC in North America short-haul markets	3.9	3.8	4.2	4.0	3.7	3.9	4.8
Marketing BC in overseas countries	3.9	3.9	4.0	4.0	4.0	3.4	4.3
Enhancing public awareness of tourism and its economic value to BC	3.7	3.7	4.0	3.7	3.5	3.5	4.7
Providing support for sector/product tourism programs	3.7	3.6	-	-	3.7	4.2	-
Providing support for regional tourism programs	3.7	3.6	-	-	3.7	4.3	-
Providing support for visitor services and centres	3.7	3.6	4.0	-	3.5	-	-
Conducting tourism-related market research	3.7	3.7	4.0	3.8	3.4	3.4	4.4
Providing support for community tourism programs	3.6	3.6	-	-	3.6	3.6	-
Providing quality training and development programs	3.6	3.6	3.8	**	3.5	3.6	-

*Caution: small base size. **Data not presented due to extremely small base size.

Q4. Over the past year (April 2017 to March 2018) how would you rate Destination BC's performance on each of the following?

Delivering on Legislative Mandate: Longitudinal Comparison

Delivering on Legislative Mandate: Longitudinal Comparison

- Destination BC's performance on the delivery of its legislative mandate has either maintained or strengthened since 2017. Areas in which performance has strengthened are:
 - Providing industry leadership in tourism marketing
 - Marketing BC as a tourist destination in North America long-haul markets
 - Marketing BC in overseas countries as a tourist destination
 - Providing support for sector/product tourism marketing programs
 - Providing support for regional tourism programs
 - Providing quality training and development programs

Delivering on Legislative Mandate: Longitudinal Comparison (All Stakeholders)

	2014		2015		2016		2017		2018		% Change in Mean ('17-'18)
	Mean	% Rating Exc./ V.Gd.	Mean	% Rating Exc./ V.Gd.	Mean	% Rating Exc./ V.Gd.	Mean	% Rating Exc./ V.Gd.	Mean	% Rating Exc./ V.Gd.	
Providing industry leadership in tourism marketing	3.3	35%	3.4	41%	3.7	47%	3.8	55%	3.9	58%	+3%
Marketing BC as a tourist destination in North America short-haul markets	3.5	36%	3.5	42%	3.8	52%	3.9	57%	3.9	55%	0%
Marketing BC as a tourist destination in North America long-haul markets	3.3	26%	3.5	31%	3.7	40%	3.8	44%	4.0	55%	+5%
Enhancing public awareness of tourism and its economic value to British Columbia	3.2	33%	3.4	41%	3.6	51%	3.7	54%	3.7	55%	0%
Marketing BC in overseas countries as a tourist destination	3.3	24%	3.5	33%	3.7	36%	3.8	45%	3.9	50%	+3%
Providing support for community tourism programs	3.2	25%	3.2	28%	3.4	33%	3.6	43%	3.6	48%	0%
Providing support for sector/product tourism marketing programs	3.2	27%	3.3	33%	3.5	41%	3.5	39%	3.7	46%	+6%
Providing support for regional tourism programs	3.1	23%	3.3	30%	3.5	35%	3.5	41%	3.7	45%	+6%
Providing support for visitor services and centres	3.4	36%	3.4	34%	3.7	45%	3.7	45%	3.7	42%	0%
Conducting tourism-related market research	3.3	27%	3.4	34%	3.6	38%	3.7	43%	3.7	42%	0%
Providing quality training and development programs	3.3	32%	3.4	33%	3.5	37%	3.5	35%	3.6	40%	+3%

Overall Satisfaction with Destination BC

Overall Satisfaction

- Stakeholders who are at least somewhat familiar with Destination BC’s programs and services were asked to rate Destination BC’s overall performance on a scale of 1 to 10, where 1 means ‘Poor’ and 10 means ‘Excellent’.
- Overall, 81% of stakeholders give Destination BC a rating of 7 or higher. Weighting each strata equally resulted in an overall mean score of 8.1.
- Media Relations, Travel Trade and Visitor Centres express the highest levels of overall satisfaction with Destination BC – nine-in-ten give ratings of 7 or higher, and at least one-third awarding top two ratings of 9 or 10 out of 10.
- Overall satisfaction is lower among Tourism Businesses.

Overall Satisfaction & Familiarity

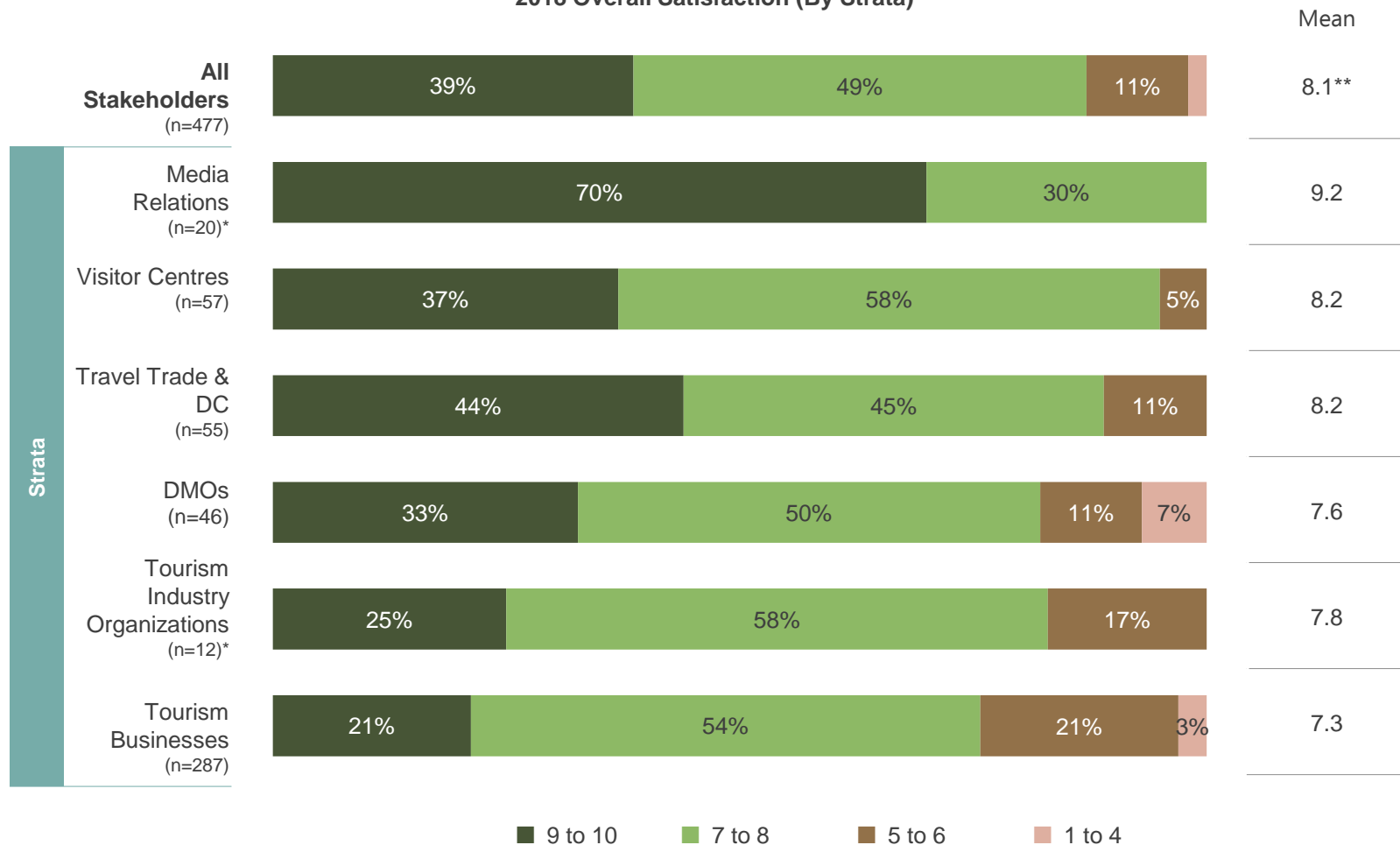
- An analysis of the relation between overall satisfaction and familiarity with Destination BC programs and services illustrates how *increasing the degree of familiarity* that tourism businesses have with Destination BC programs and services can impact overall satisfaction. The table below shows the performance metrics for overall satisfaction as a function of level of familiarity with Destination BC’s programs and services. Those who are “very familiar” with Destination BC programs and services are significantly more likely to give Destination BC high overall satisfaction ratings than those who are “familiar” with Destination BC programs and services – and the latter are significantly more likely to give Destination BC higher overall satisfaction ratings than those who are “somewhat familiar” with Destination BC programs and services.

	Familiarity with Destination BC		
Overall Satisfaction	Somewhat Familiar	Familiar	Very Familiar
% rating 7 to 10	74%	88%	89%
% rating 9 to 10	20%	26%	60%*
Mean score	7.3	7.9	8.4*

*Note: Circled numbers are significantly more likely to have higher overall satisfaction with Destination BC.

Overall Satisfaction by Strata

2018 Overall Satisfaction (By Strata)



* Caution: Small base size

** Overall mean score is calculated based on equal weight per strata.

Q6. On a scale of 1 to 10, where 1 means 'Poor' and 10 means 'Excellent', please provide your rating for: Overall performance of Destination BC

Overall Satisfaction: Longitudinal Comparison

Overall Satisfaction: Longitudinal Comparison

- Overall satisfaction with Destination BC continues to improve year over year, increasing marginally from an average of 7.5 in 2017 to 7.7 in 2018. The weighted mean increased from 8.0 in 2017 to 8.1 in 2018.
- Overall satisfaction ratings across most strata were stable with two exceptions being: 1) Visitor Centres did show a moderate increase in overall satisfaction from 2017 to 2018 (90% rating 7 to 10 in 2017 vs. 95% in 2018), and 2) Satisfaction softened among Tourism Industry Organizations in comparison to 2017 (93% rating 7 to 10 in 2017 vs. 83% in 2018).
- Overall satisfaction among businesses in the Thompson Okanagan region also showed a moderate increase compared to 2017 (73% rating 7 to 10 in 2017 vs. 83% in 2018).

Suggestions for Improvement

- All stakeholders who gave an overall satisfaction rating of 8 or lower were asked if there was anything Destination BC could do to improve its performance. Just under two-thirds of stakeholders (64%) did not provide any suggestions. Among those providing suggestions there was no one dominant theme. The most common suggestions were to focus more on marketing the smaller regional and community tourism destinations and to provide more information about the programs and services that Destination BC offers.

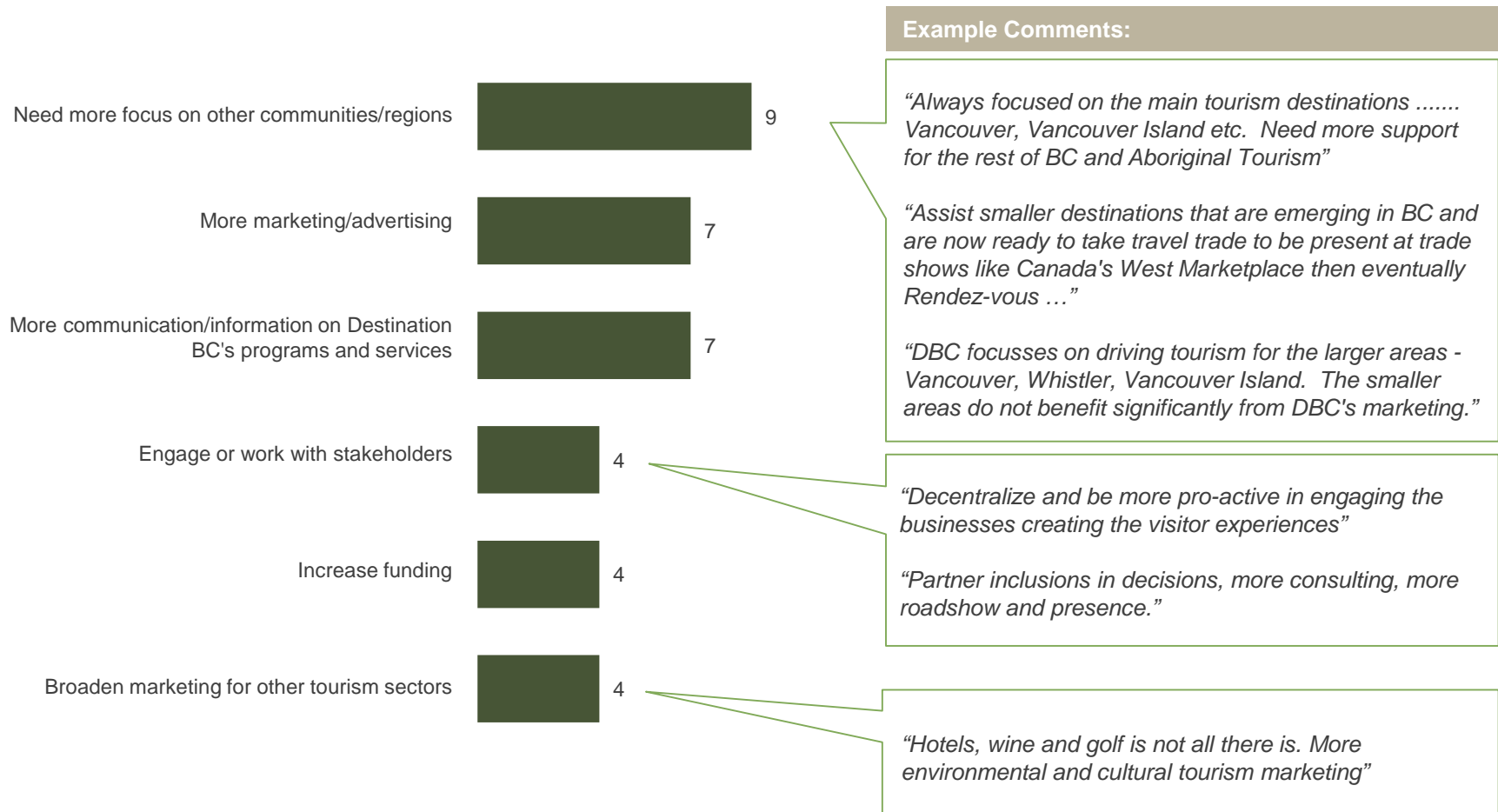
Overall Satisfaction: Longitudinal Comparison by Strata

		2014		2015		2016		2017		2018		% Change in Mean ('17-'18)
		Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	
Strata	Media Relations	8.7	97%	8.8	97%	9.2	100%	9.2	100%	9.2	100%	
	Visitor Centres	7.6	78%	7.5	80%	8.1	91%	8.1	90%	8.2	95%	1%
	Travel Trade	8.2	87%	8	85%	8.2	85%	8.2	90%	8.2	89%	0%
	DMOs	6.2	46%	6.7	61%	7.3	73%	7.7	83%	7.6	83%	-1%
	Tourism Industry Organizations	6.9	70%	7.6	92%	7.1	81%	7.7	93%	7.8	83%	1%
	Tourism Businesses	6.1	46%	6.6	60%	6.9	67%	7.3	73%	7.3	75%	0%
	Weighted	7.3	N/A	7.5	N/A	7.8	N/A	8.0	N/A	8.1	N/A	2%

Overall Satisfaction: Longitudinal Comparison by Region (For Tourism Businesses Only)

		2014		2015		2016		2017		2018		% Change in Mean ('17-'18)
		Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	Mean	% Rating 7 to 10	
Tourism Business by Region	Thompson Okanagan	6.3	49%	6.7	63%	7.1	72%	7.3	73%	7.5	83%	
	Vancouver, Coast & Mountains	6.4	49%	6.8	58%	6.9	69%	7.5	77%	7.5	78%	0%
	Vancouver Island	6.0	40%	6.8	65%	6.8	63%	7.3	74%	7.3	72%	0%
	Northern BC	6.0	52%	6.4	58%	6.6	64%	6.9	70%	7.3	72%	6%
	Kootenay Rockies	5.7	40%	6.7	62%	6.8	70%	7.1	74%	7.2	72%	1%
	Cariboo Chilcotin Coast	5.6	46%	5.6	43%	6.3	53%	6.7	61%	6.6	57%	-1%

Suggestions to Improve Destination BC's Performance



Note: 1) 36% (or 135) of stakeholders provided comments

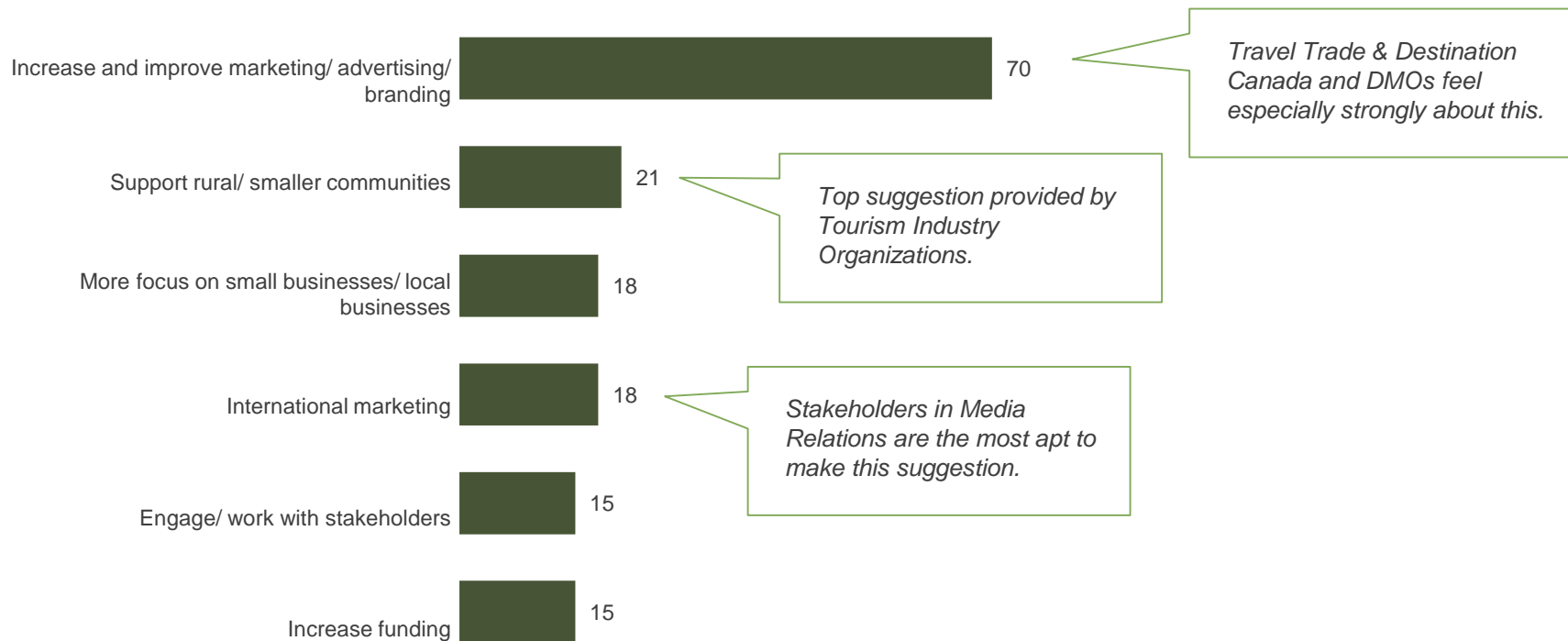
2) Only suggestions with at least 3% of mentions are shown in the chart above.

Base: Among stakeholders that rated overall performance 8 or lower (339)

Q7. What could Destination BC do to improve its performance?

How Destination BC Can Best Support Tourism in BC

All stakeholders who completed the survey online (telephone respondents were excluded), were asked to express, in their own words, their opinion on Destination BC's most important role in supporting tourism in BC.



Note: 1) 68% (or 304) of stakeholders provided comments

2) Only suggestions with at least 5% of mentions are shown in the chart above.

Q10. In your view, what is the most important thing Destination BC can do to support tourism in British Columbia?

Perceptions and 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.

Overall (All Stakeholders)

The results illustrate that stakeholders hold Destination BC employees in high regard, perceiving them as highly respectful and knowledgeable regarding issues impacting tourism.

Consistent with other results from the survey, stakeholders also perceive Destination BC as a very effective strategic marketing organization, providing leadership and direction to the BC tourism industry and focussing on markets and programs that align with the needs of the industry.

Stakeholder perceptions of Destination BC are positive but somewhat weaker when it comes to Destination BC addressing questions and concerns in a timely manner, informing the industry of its corporate strategy and future direction, and providing marketing tools and platforms to assist businesses.

Stakeholder perceptions of Destination BC are weakest when it comes to understanding the needs of tourism businesses/organizations, collaborating and consulting with the tourism industry on key decisions, being transparent about its corporate performance, and spending funds wisely and responsibly.

Note, however, when it comes to transparency and spending, a substantial percentage of stakeholders indicate that they don't know enough about Destination BC's performance in these areas to provide a rating. For example, responding 'don't know' to a question asking whether or not Destination BC spends funds wisely and responsibly is a legitimate response given that many stakeholders probably don't read Destination BC's financial statements.

Perceptions and Attitudes

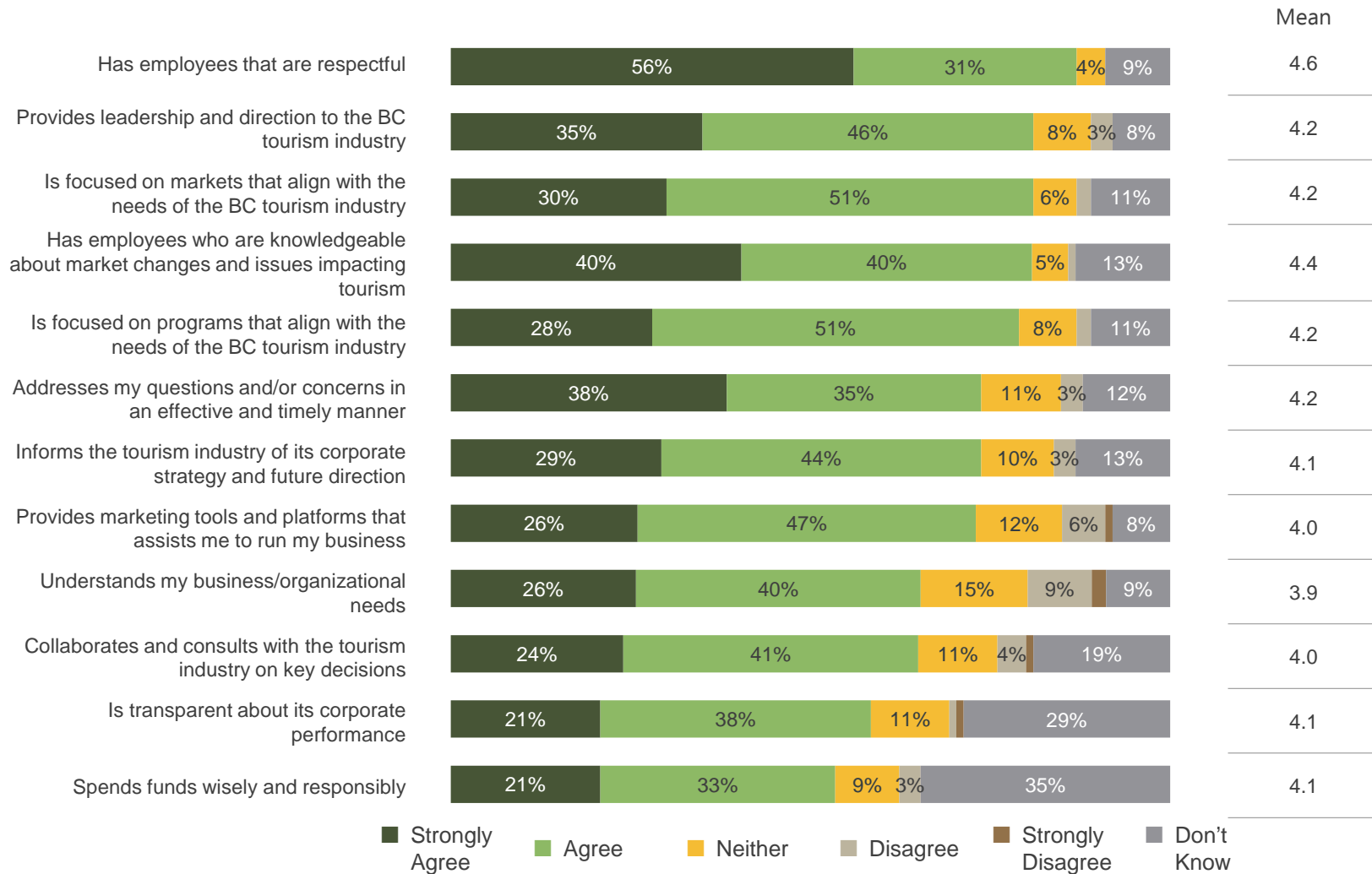
Perceptions and Attitudes by Strata

DMO, Visitor Centre and Travel Trade stakeholders generally have very positive perceptions of Destination BC across most attributes. However, Travel Trade stakeholders have more positive perceptions than DMO and Visitor Centre stakeholders when it comes to Destination BC collaborating and consulting with the industry on key decisions and understanding stakeholder business/organizational needs.

Tourism Business stakeholders have less positive perceptions of Destination BC across most attributes. There are several areas in which perceptions of Destination BC among this stakeholder group are low relative to other stakeholders. These areas include: understanding stakeholder business/organizational challenges, addressing questions and/or concerns in an effective and timely manner, providing marketing tools and platforms that assist stakeholders to run their businesses, informing the industry of DBC's corporate strategy and future direction, and collaborating and consulting with the industry on key decisions.

Media Relations stakeholders also have less positive perceptions of Destination BC relative to other stakeholders when it comes to collaborating and consulting with the industry on key decisions, informing the industry of its corporate strategy and future direction – and being focussed on programs and markets that align with the needs of the tourism industry. However, these results need to be interpreted with caution given the small base size. The same holds true for Tourism Industry Organization stakeholders who have less positive perceptions of DBC for providing marketing tools and platforms that assist stakeholders to run their businesses.

Perceptions and Attitudes - All Stakeholders



Base: 438

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

Perceptions and Attitudes - by Strata

% Strongly Agree/Agree

	Total	Strata					
		DMOs	Tour. Ind.Org.	T.Trade & DC	Visitor Centres	Media Rel.	Tour. Bus.
<i>Base</i>	438	43	12	54	53	17	259
Has employees that are respectful	87	95	92	93	94	100	82
Provides leadership and direction to the BC tourism industry	82	91	83	81	96	76	77
Is focused on markets that align with the needs of the BC tourism industry	81	91	83	89	83	65	78
Has employees who are knowledgeable about market changes and issues impacting tourism	80	93	92	87	83	94	75
Is focused on programs that align with the needs of the BC tourism industry	80	91	75	87	83	59	77
Addresses my questions and/or concerns in an effective and timely manner	73	91	75	89	98	100	60
Informs the tourism industry of its corporate strategy and future direction	73	84	92	80	85	41	69
Provides marketing tools and platforms that assists me to run my business	73	86	58	91	81	71	66
Understands my business/organizational needs	66	72	75	94	74	94	56
Collaborates and consults with the tourism industry on key decisions	65	72	75	80	68	35	62
Is transparent about its corporate performance	59	81	67	65	70	41	52
Spends funds wisely and responsibly	54	70	58	81	55	53	45

BC Tourism Industry Collaboration and Alignment

Stakeholders rated how collaborative they feel the BC tourism industry is on a 10-point scale anchored by 1 'fragmented and not aligned' and 10 'collaborative and well-aligned'.

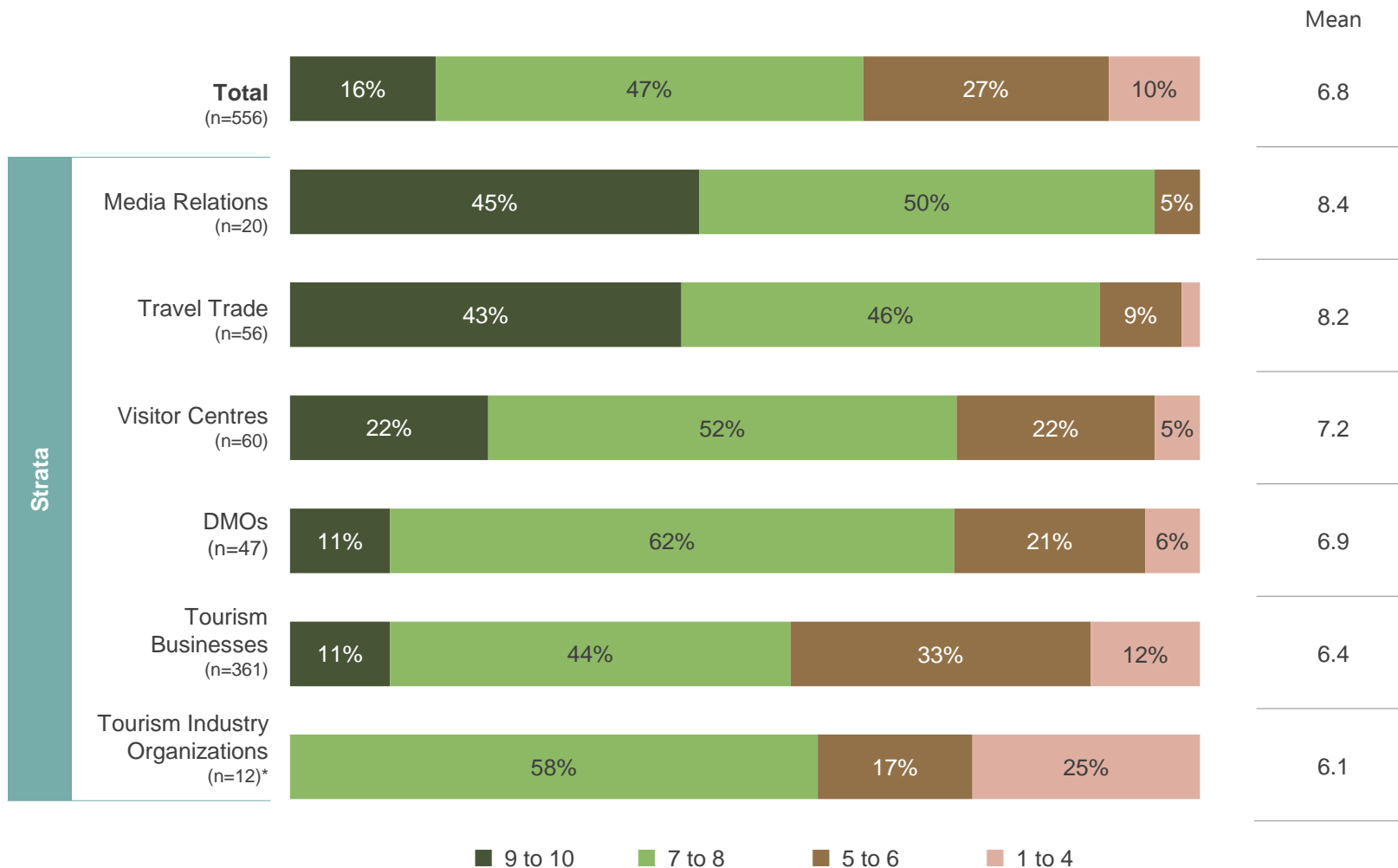
Perceptions of the level of collaboration within BC's tourism industry differ substantially across stakeholder groups. Media Relations stakeholders and Travel Trade stakeholders are the groups most likely to see the industry as highly collaborative, followed by Visitor Centre stakeholders.

Tourism Industry Organizations, DMOs, and Tourism Businesses are the stakeholder groups least likely to perceive the industry as highly collaborative.

Suggestions to Improve Collaboration and Alignment

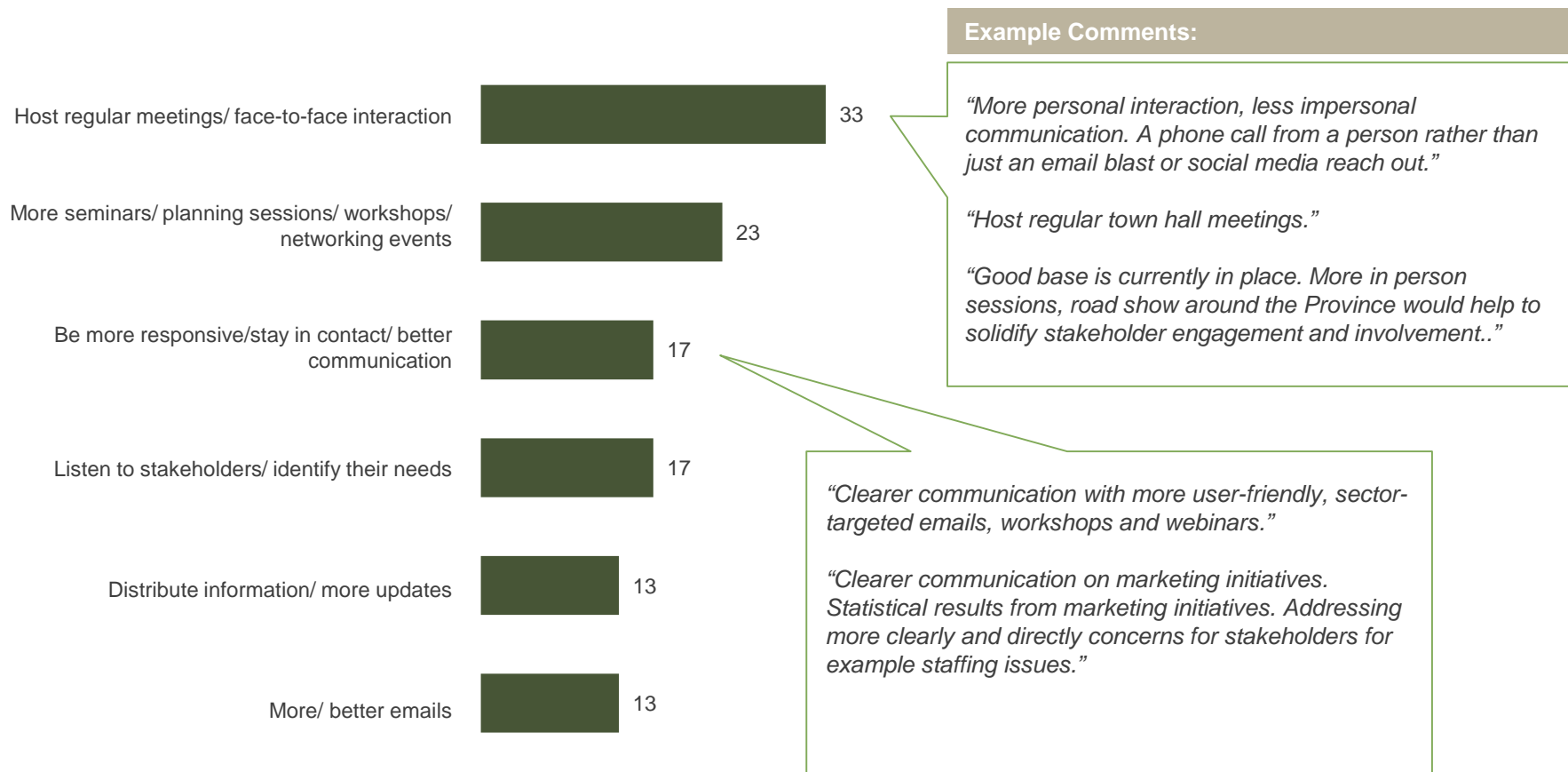
Stakeholders provided various suggestions for Destination BC to improve its collaboration and alignment with stakeholders, with the top suggestion being hosting regular meetings or in-person meetings with stakeholders.

Rating of BC's Tourism Industry Collaboration and Alignment: By Strata



Q13. How collaborative is the British Columbia tourism industry? On a scale of 1 to 10, where 1 means 'fragmented' and not aligned and 10 means 'collaborative and well-aligned', please provide your rating of the British Columbia tourism industry.

Suggestions to Improve Collaboration and Alignment



Note: 1) 52% (or 332) of stakeholders provided comments

2) Only suggestions with at least 4% of mentions are shown in the chart above.

14. Effective communication is important in order to increase collaboration and alignment. In your opinion how can Destination BC improve communication with stakeholders and industry partners?