



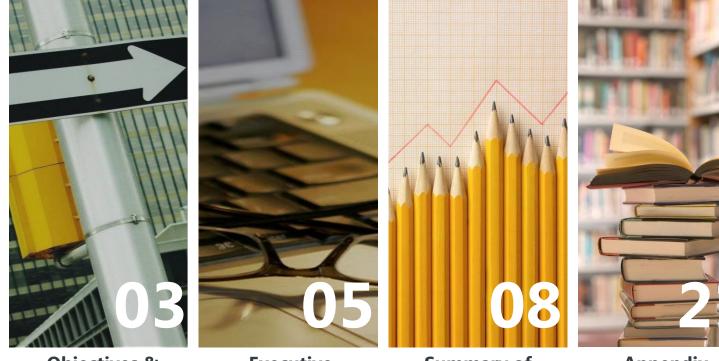
BC Construction Safety Alliance Market Penetration Survey Report

April 14, 2016

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Objectives & Methodology

Objectives & Methodology

Objectives

- WorkSafeBC, in partnership with the BC Construction Safety Alliance (BCCSA), enlisted Sentis Research to develop and carry out a survey with employers in BC's Construction sector.
- The main objectives of the survey were to measure employer awareness of BC Construction Safety Alliance and identify their needs and preferences for health and safety information and support.
- The survey covered the following topics:
 - 。 General perceptions around safety in Construction
 - Awareness of BCCSA
 - Satisfaction with BCCSA
 - Usage of and satisfaction with the services, resources, and information provided by BCCSA
 - Desired services and communication channels
- This report covers the results from the survey for BC Construction Safety Alliance.

Methodology

- The survey was conducted by emailing employers an invite to participate in the survey. The email contained a unique link to the online survey, hosted at www.sentis.ca.
- Surveying took place from February 2 to 28, 2016.

 A total of 413 surveys were obtained from employers falling within BC Construction Safety Alliance's industry subsectors, including 384 in General Construction, 18 in Road Construction or Maintenance, 7 in Heavy Construction, 2 in Oil & Gas or Mineral Resources, and 2 in Metal and Non-Metallic Mineral Products.

Email Sample	Surveys	Participation	Margin of Error (19 times out of 20)
Invited	Obtained	Rate	
5,490	413	8%	±5%

• The survey sample was weighted by company size¹ to match the actual employer composition for the sector.

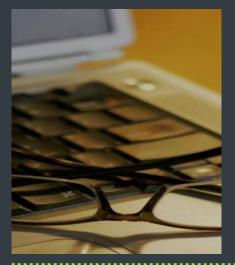
 $^1\,{\rm Company}$ size is based on WorkSafeBC's Estimated 2016 Employer Payroll Size and the categories are defined as follows:

Very Small: employers with a calculated 2016 assessable payroll amount less than \$150K, and a base WorkSafeBC assessment rate less than \$3K.

Small: employers with a calculated 2016 assessable payroll amount greater than or equal to \$150K, but less than \$600K, and/or a base WorkSafeBC assessment rate greater than or equal to \$3K, but less than \$12K.

Medium: employers with a calculated 2016 assessable payroll amount greater than or equal to \$600K, but less than \$1.6 million, and a base WorkSafeBC assessment rate greater than or equal to \$12K, but less than \$40K.

Large: employers with a calculated 2016 assessable payroll amount greater than or equal to \$1.6 million, and a base WorkSafeBC assessment rate greater than or equal to \$40K.



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Executive Summary

Executive Summary

Industry Perceptions

• Most BC employers involved in Construction feel that workplace safety is improving in their industry.

63% of employers say workplace safety is improving

• The most common types of health and safety risks identified by employers in the sector are:



Working at/falling from heights (30%) Inattention/apathy/carelessness/ negligence (15%) Lack of training/knowledge/experience (14%) Inhalation risks (14%)

Awareness of BCCSA

• Nearly half of employers in BC's Construction sector have heard of BC Construction Safety Alliance, including 7% that named the association on an unaided basis.



• Employers typically became aware of BCCSA as a result of being emailed by the association, through word of mouth, or by hearing/seeing an advertisement.







email

Word of Mouth

Advertisement

Satisfaction with BCCSA

• Employers aware of BCCSA are either satisfied with the organization's performance on promoting health and safety in the industry, or lack an opinion. Just 3% have a negative perception.



Are satisfied with BCCSA's performance

Have a neutral or no opinion of BCCSA's performance

Usage and Satisfaction of H&S Resources

19% of employers in the sector have used BCCSA's services, resources, or information

(Among employers who are aware of BCCSA, 41% recall receiving services, resources, or information from the association).

- BCCSA's most utilized resources are:
 - Health & Safety resources such as booklets, videos, and manuals (9%)
 - Updates and notifications for H&S news, regulatory changes, etc. (9%)
 - Training (6%)

Executive Summary

How to Provide Better Support to Employers

- Employers were asked whether there was anything else BCCSA could do to better serve or support their company or industry. The top suggestions include:
 - Providing more opportunities for education and training (10%)
 - Raising BCCSA's profile in the industry (7%)
 - Sending updates and newsletters (6%)
 - Making education/training more accessible (6%)
 - Improving audits and enforcement of safety policies (6%)
- The top services, resources, or information that employers would like BCCSA to provide are:
 - Training (50%)
 - Health & Safety resources such a booklets, videos, and manuals (47%)
 - Updates & notifications for H&S news, regulatory changes, etc. (44%)

Communication Preferences

- The top choices for receiving communications from BCCSA are:
 - Personal/direct emails (63%)
 - Group emails such as an e-newsletter subscription (49%)
 - The BCCSA website (38%)
 - Regular mail (38%)
- Nearly six-in-ten employers express interest in receiving services, resources, or information from BCCSA, while one-quarter are unsure and one-in-ten are not interested.

57% of employers are interested in receiving services, resources, or information from BC Construction Safety Alliance

(This is compared to only 19% of employers who currently use or receive services, resources, or information from BCCSA).



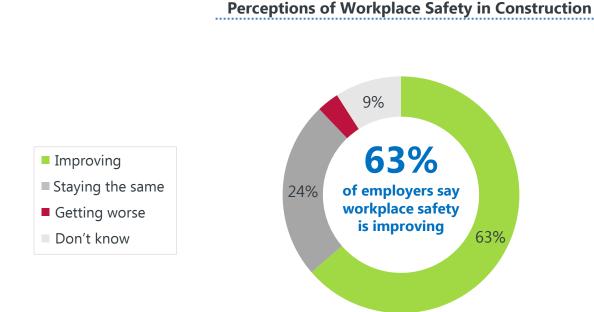
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Summary of Findings

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Perceptions of Workplace Safety

- Employers in BC's Construction sector generally feel that workplace safety is improving in their industry. Specifically, 63% believe it is improving while most of the balance, 24%, believe there's been no change. Only 3% say that workplace safety in the Construction industry is getting worse.
- By subsector, the view that safety is improving is higher among companies involved in General Construction (64% improving) than in Road Construction or Maintenance (49% improving). Medium and Large companies also tend to be more positive, with 74% of these companies believing safety is improving compared with 63% of Small and Very Small companies.



Main Health & Safety Risks in Construction

- There are several types of health and safety risks identified by employers in the sector.
- Working at and/or falling from heights is considered the most common risk.
- This is followed by inattention/apathy/carelessness, lack of training, knowledge, or expertise, and inhalation risks.



Base: All BC Construction Safety Alliance employers (413)

Q10. In every industry there is some degree of health and safety risk to workers. What do you think are the main health and safety risks in your industry?

Awareness of BC Construction Safety Alliance

- Nearly one in two employers (46%) in BC's Construction sector have heard of BC Construction Safety Alliance, including 7% that named the association on an unaided basis.
- Awareness steps up with employer size, with Large employers being particularly likely to be able to name the association on an unaided basis (53% versus 5% of Very Small employers).
- Awareness of BC Construction Safety Alliance is fairly consistent across the subsectors.
- The only organization to garner a greater share of unaided awareness than BC Construction Safety Alliance in the sector is WorkSafeBC, which was cited by 28% of employers on an unaided basis.



Other Health & Safety Organizations Named (Unaided)	% Mentioning
WorkSafeBC/Worker's Compensation Board	28%
Unions	4%
BC Construction Association (BCCA)	3%
BC Safety Authority (BCSA)	3%

 Correctly Named BC Construction Safety Alliance Without Prompting (Unaided)

- Aware of BC Construction Safety Alliance When Prompted (Aided)
- Not Aware of BC Construction Safety Alliance

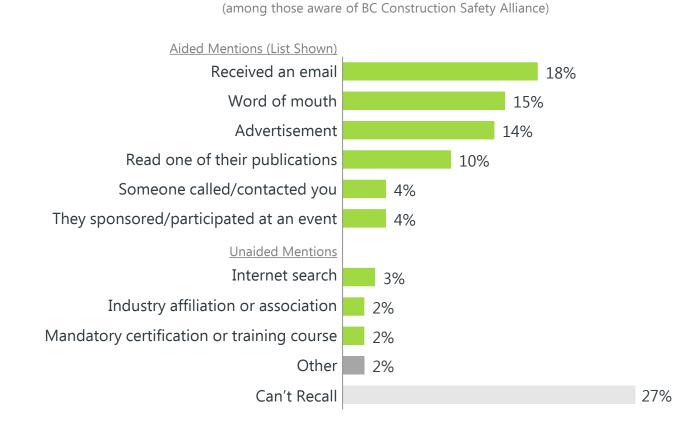
Base: All BC Construction Safety Alliance employers (413)

Q2. Can you think of any organizations in BC that support or promote workplace health and safety in Construction?

Q3a. Have you heard of BC Construction Safety Alliance?

Sources of Awareness of BC Construction Safety Alliance

- Employers typically became aware of BC Construction Safety Alliance as a result of being emailed by the association, through word of mouth, an advertisement, or from reading one of the association's publications.
- Email communication is particularly important for raising awareness of the association among Very Small and Small employers (20% and 17% respectively) compared to just 5% among their larger counterparts. For Large employers, word of mouth is the most common way they learn about the association (25% first heard of the BCCSA this way).



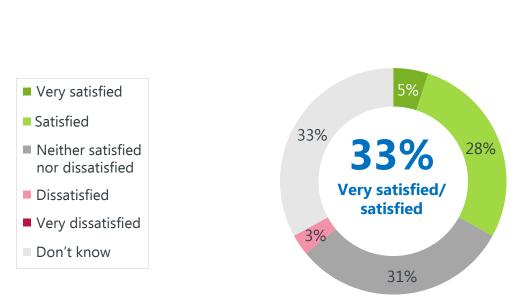
Original Source of Awareness of BC Construction Safety Alliance

Base: Among those aware of BC Construction Safety Alliance (198) *Q3b. How did you first hear about BC Construction Safety Alliance?*

Satisfaction with BC Construction Safety Alliance

- Employers aware of BC Construction Safety Alliance tend to be either satisfied with the organization's performance on promoting health and safety in the industry, or they lack an opinion. Only 3% are dissatisfied with BCCSA's performance.
- Satisfaction tends to be stronger among Medium and Large companies, but that seems to largely stem from greater familiarity with the organization.

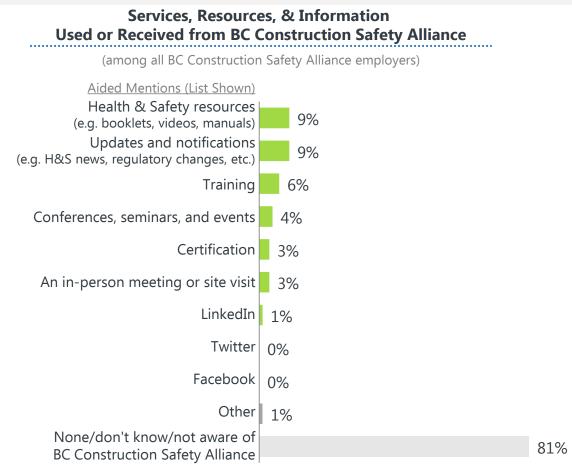
Satisfaction with BC Construction Safety Alliance's Promotion of Health & Safety



(among those aware of BC Construction Safety Alliance)

Services, Resources, & Information Used or Received

- Overall, two in ten employers recall receiving some kind of service, resource, or information from BCCSA.
- Among those employers aware of BCCSA, four in ten recall receiving services, resources, or information from the association.
- BCCSA's most utilized resources are H&S booklets, videos, and manuals, and updates and notifications. Each are used by about one in ten employers in the industry.
- Training, conferences, seminars, and events, certification, and in-person meetings or site visits round out the other common interactions or services.



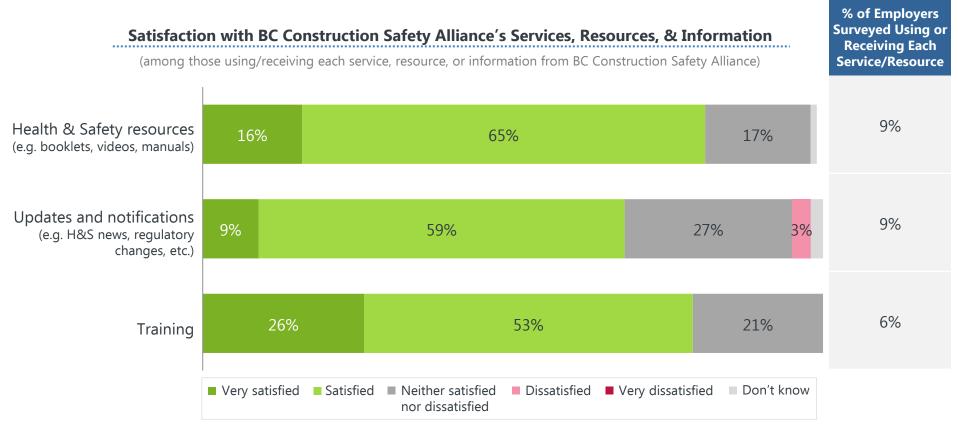
Base: All BC Construction Safety Alliance employers (413)

Q5. The BC Construction Safety Alliance offers various services, resources, and information on health and safety. Which of these services, resources, or information has your company used or received from BC Construction Safety Alliance?

Satisfaction with Services, Resources, & Information

Employers assessed each of the services received; presented below is the feedback on the three services that received at least 30 assessments.

- Training is especially well received by employers. Among those who have received training, eight in ten are satisfied that it met their needs, including 26% who were very satisfied. No employers expressed dissatisfaction, leaving the balance as neither satisfied nor dissatisfied.
- Employers are also satisfied with the health and safety resources (81% satisfied), although the degree of satisfaction is less strong compared with training (16% versus 26% very satisfied, respectively).
- Seven-in-ten employers report satisfaction with the updates and notifications received.



Base: Among those receiving services, resources, and information from BC Construction Safety Alliance (31-44)

Note: Only services/resources with 30+ responses are shown.

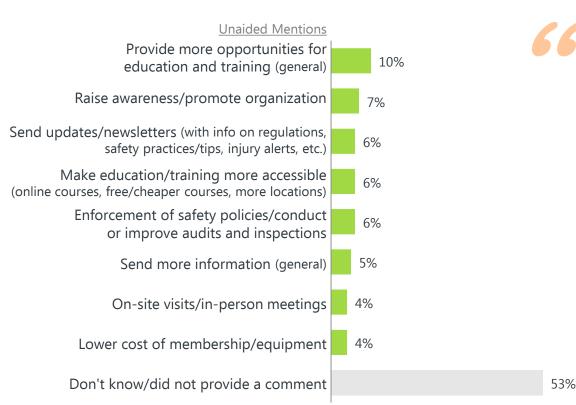
Q5. The BC Construction Safety Alliance offers various services, resources, and information on health and safety. Which of these services, resources, or information has your company used or received from BC Construction Safety Alliance?

Q6. How would you rate the [INSERT EACH ITEM USED/RECEIVED IN Q5] on meeting your needs?

Suggestions for Support

 Employers were asked whether there was anything else BCCSA could do to better serve or support their company or industry in promoting health and safety in the workplace. The top suggestions include providing more opportunities for education and training, and raising BCCSA's profile in the industry. Sending updates and newsletters, making education/training more accessible, and improving audits and enforcement of safety policies are also mentioned by 6% of employers.

Suggestions for how BC Construction Safety Alliance Could Support Employers



(% mentioning/major mentions only)

"Offer seminars to address different levels of experience, information etc."

"Do an awareness campaign to promote what they do and the services they provide."

"By providing health and safety literature to companies on a regular basis."

"Make courses affordable and reachable by providing them in smaller communities ie: Sparwood."

"Do checks on construction site & make sure all trades that are working on the site are covered by WorkSafe either by the company doing the job & the sub trades brought in to do specific trades."

"Show how some real worksite situations were made safer, such as new equipment or techniques being used."

"More on site visits, holding companies accountable for their personnel's safety."

"Give discount like icbc. No claim = very low payments. Promote safety with low payments."

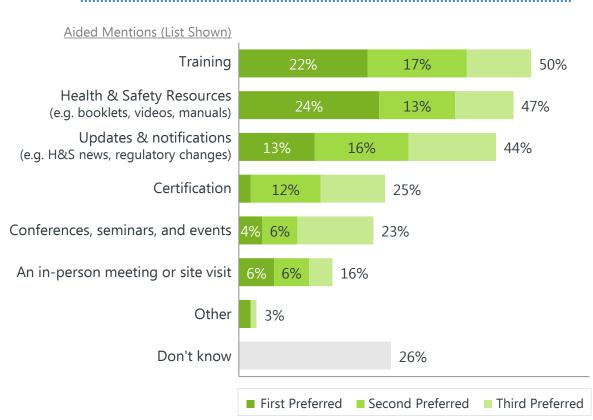
Base: All BC Construction Safety Alliance employers (413)

Q7. In what ways could BC Construction Safety Alliance better serve or support your company and industry to improve health and safety in your workplace?/The BC Construction Safety Alliance is the health and safety association for the Construction industry in BC. With this in mind, in what ways could BC Construction Safety Alliance serve or support your company and industry to improve health and safety in your workplace?

Preferred Services, Resources, & Information

Employers were provided with a list of ways that BCCSA could help their company improve health and safety, and asked to select their top three choices.

- The top preference is for BCCSA to provide training, which 50% ranked within their top three choices, including 22% who ranked it as their top priority. Interest in training tends to increase with employer size.
- The next two most popular services are health and safety resources and updates/notifications, both of which attract the interest of about 45% of employers.



Top Three Preferred Services, Resources, & Information for BC Construction Safety Alliance to Provide

Base: All BC Construction Safety Alliance employers (413)

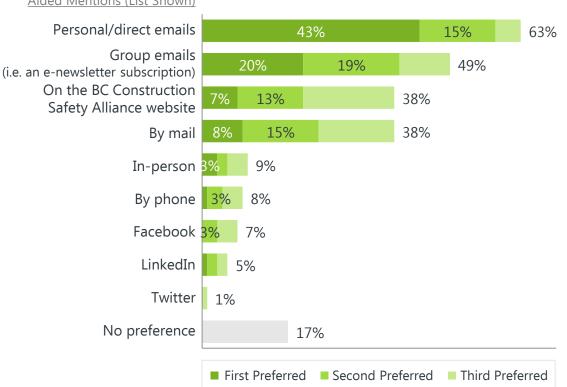
Q8. Looking ahead, what kinds of services, resources, or information from BC Construction Safety Alliance would most help you improve health and safety in your workplace?

Preferred Communication Channels

Employers were provided with a list of communication channels for receiving information from BCCSA and asked to select their top three choices.

- The top choice for communications is emails, with personal/direct emails favoured over group emails.
- The BCCSA website and regular mail round out the top choices with 38% ranking these channels within their top three preferences.

Top Three Preferred Channels for Receiving Information from BC Construction Safety Alliance



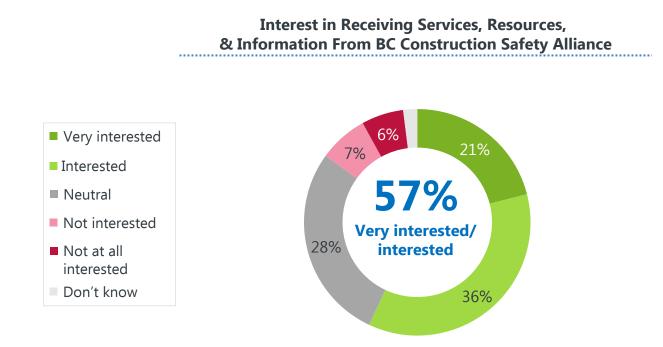
Aided Mentions (List Shown)

Base: All BC Construction Safety Alliance employers (413)

Q9. How would you generally prefer to receive information (e.g. updates on new services and resources, H&S news, regulatory changes) from BC Construction Safety Alliance?

Interest in Receiving Services, Resources, & Information

- Nearly six-in-ten employers express interest in receiving services, resources, or information from BCCSA, while three-in-ten are unsure. About one-in-ten are not interested in receiving services, resources, or information from BCCSA.
- Interest steps up with company size, rising from about 56% of Very Small and Small companies, to 66% of Medium companies and 84% of Large companies.



Base: All BC Construction Safety Alliance employers (413)

Q9b. Generally speaking, how interested are you in receiving services, resources, or information to improve heath and safety in your workplace?

Employer Profile

- The table below shows the profile of employers that were surveyed, broken down by employer size (based on WorkSafeBC's estimated 2016 assessable employer payroll size).
- Seven-in-ten BCCSA employers have three or fewer employees in BC.
- Three quarters of those completing the survey were business owners, with the remaining 25% holding varied positions.
- The vast majority (93%) of employers are in the General Construction subsector and 5% work in Road Construction. This leaves less than 3% working in Oil & Gas or Mineral Resources, Metal and Non-Metallic Mineral Products and Heavy Construction.

		Estimated 2016 Employer Payroll Size				
	Total	Very Small	Small	Medium	Large	
(base)	<u>%</u> (413)	<u>%</u> (215)	<u>%</u> (150)	<u>%</u> (29*)	<u>%</u> (19*)	
Number of Employees in BC						
None/No employees	16	22	6	-	-	
1-3 employees	54	67	39	3	-	
4-19 employees	25	10	53	55	5	
20-99 employees	5	<1	3	41	74	
100+ employees	<1	-	-	-	21	
Role in Company						
<u>Aided List</u>						
Business owner	75	83	69	34	11	
Senior executive	1	-	1	7	16	
Manager	6	2	11	21	11	
Supervisor	2	1	3	3	5	
Staff member	1	1	1	3	5	
Dedicated health and safety position	3	1	2	14	53	
Internal bookkeeper/accountant	7	5	10	14	-	
Unaided Mentions						
All of the above	2	3	-	-	-	
Contracted	1	<1	1	-	-	
Self Employed	1	1	-	-	-	
Other	1	<1	2	3	-	
Subsector						
7040 Oil & Gas or Mineral Resources	1	1	-	-	-	
7120 Metal and Non-Metallic Mineral Products	<1	<1	-	3	-	
7210 General Construction	93	92	96	83	95	
7220 Heavy Construction	1	1	2	3	5	
7230 Road Construction	5	6	2	10	-	

Note: All data has been weighted by the estimated employer payroll size to match the target population. *Caution: small base size.



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Appendix Questionnaire

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EMAIL INVITE TO SURVEY [ALL CAP TEXT NOT SHOWN TO RESPONDENT]

Subject: WorkSafeBC would like to hear from you! From: WorkSafeBC & Sentis Research



Dear sir/madam,

We are conducting a research study about health and safety in your industry.

If you are the person responsible for health and safety in your company, or the owner/operator of your company, we would really like to hear from you! (*If not, then please forward this email to the right person – thank you!*)

The survey is quick and easy. We've enlisted Sentis Research to conduct the survey and keep all responses confidential. Only aggregated results will be shared with WorkSafeBC and industry member health and safety associations.

Please answer the question below to get started.

Generally speaking, would you say that workplace safety in your industry is...

- O Improving
- O Getting worse
- O Staying the same
- O Don't know

Don't have much to say on the topic? That's okay. We still want to hear from you.



You can begin the survey by clicking start survey below.

Start Survey

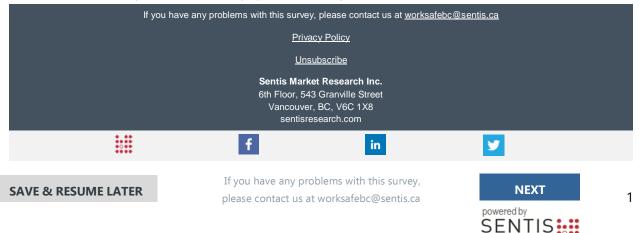
If you are unable to click on the button, copy the entire text of this link and paste it into your web browser: {SURVEY URL}

We really appreciate your feedback.

Regards,

WorkSafeBC & Sentis Research

About this Survey: WorkSafeBC has enlisted an independent research firm, Sentis Market Research, to conduct this survey. Your participation is completely voluntary. All responses will be kept confidential by Sentis; though, if you include personal information in your responses, you will be considered to have consented to that personal information being collected and used by WorkSafeBC for the purpose of this survey.







EMAIL REMINDER [ALL CAP TEXT NOT SHOWN TO RESPONDENT]

Subject: Reminder: WorkSafeBC would like your feedback! From: WorkSafeBC & Sentis Research



Dear sir/madam,

There is still time to participate in WorkSafeBC's health and safety survey!

Please complete the survey by Friday, February 12.

Start Survey

If you started the survey but didn't finish it, you can pick up right from where you left off:

Continue Survey

If you're not the person responsible for health and safety in your company, or the owner/operator of your company, then please forward this email to the right person – thank you!

It's really easy and should only take about 7 minutes.



Don't have much to say on the topic? That's okay. We still want to hear from you.

If you are unable to click on the button, copy the entire text of this link and paste it into your web browser: {SURVEY URL}

We've enlisted Sentis Research to conduct the survey and keep all responses confidential. Only aggregated results will be shared with WorkSafeBC and industry member health and safety associations.

We really appreciate your feedback.

Regards,

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SAVE & RESUME LATER







Welcome to the WorkSafeBC Industry Survey

The survey will take about 5 minutes and all responses will be kept confidential. If you have any questions or problems with the survey, please email us at <u>worksafebc@sentis.ca</u>

PROGRAMMING NOTE: THE FIRST SURVEY QUESTION IS ALSO EMBEDDED IN THE EMAIL; ONCE ANSWERED THE RESPONDENT IS BROUGHT DIRECTLY INTO THE SURVEY AT Q2. THE RESPONDENT CAN ALSO ENTER THE SURVEY BY CLICKING THE LINK ON THE EMAIL AND THAT WILL BRING THEM TO Q1. IF A RESPONDENT LEAVES THE SURVEY MID-WAY THEY ARE ABLE TO RE-ACCESS LATER WHERE THEY LEFT OFF.

Q1. [single choice]

Generally speaking, would you say that workplace safety in your industry is...

- 1. Improving
- 2. Getting worse
- 3. Staying the same
- 97. Don't know
- Q2. [open end]

Can you think of any organizations in BC that support or promote workplace health and safety in Construction?

Please list up to three.

POP UP IF LEFT BLANK: If you can't think of any please type "don't know" in the first box.

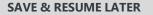
SKIP Q3a IF ALREADY MENTIONED IN Q2. IF HSA IS MISSPELLED RESPONDENT WILL BE ASKED Q3a.

Q3a. [single choice]

PROMPT IF LEFT BLANK: You missed this question. If you are unable to provide feedback, please click 'Next' to continue.

Have you heard of BC Construction Safety Alliance?

- 1. Yes
- 2. No SKIP TO Q7







Industry Survey

Q3b. [single choice]

How did you first hear about **BC Construction Safety Alliance**?

RANDOMIZE

- 1. Advertisement
- 2. Read one of their publications
- 3. Word of mouth
- 4. Someone called/contacted you
- 5. Received an email
- 6. They sponsored/participated at an event
- 96. Other (please specify)
- 97. Can't recall

Q4. [single choice]

Overall, how satisfied are you with what **BC Construction Safety Alliance** is doing to promote health and safety in your industry?

- 5. Very satisfied
- 4. Satisfied
- 3. Neither satisfied nor dissatisfied
- 2. Dissatisfied
- 1. Very dissatisfied
- 97. Don't know

Q5. [multi choice]

The **BC Construction Safety Alliance** offers various services, resources, and information on health and safety.

Which of these services, resources or information has **your company used or received** from **BC Construction Safety Alliance**?

Please check all that apply.

- a. Health & Safety resources (eg. booklets, videos, manuals)
- b. Updates and notifications (eg. H&S news, regulatory changes, etc)
- c. Training
- d. Certification [IF SELECTED, POP UP MULTI LINE TEXT BOX "Specify which certification(s):"]
- e. Conferences, seminars and events
- f. An in-person meeting or site visit
- g. LinkedIn
- h. Twitter
- i. Facebook
- j. Anything else? ____

- [ANCHOR AT BOTTOM]
- 98. None/don't know [ANCHOR AT BOTTOM]

SAVE & RESUME LATER



POP UP FOR EACH ITEM SELECTED

Q6a-f. [single choice]

How would you rate [INSERT EACH ITEM USED IN Q5] on meeting your needs?

- a. the Health & Safety resources (eq. booklets, videos, manuals)
- b. the updates and notifications (eg. H&S news, regulatory changes, etc)
- c. the training
- d. the certifications
- e. the conferences, seminars and events
- f. the in-person meetings or site visits
- g. their updates on LinkedIn
- h. their tweets on Twitter
- i. their posts on Facebook
- j. INSERT OTHER FROM Q5

SCALE:

Satisfied nor dissatisfied Dissatisfied Dissatisfied	Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied	Don't know
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Q7. [open end]

IF Q3A=1: In what ways could **BC Construction Safety Alliance** better serve or support your company and industry to improve health and safety in your workplace?

IF Q3A=2: The **BC Construction Safety Alliance** is the health and safety association for the Construction industry in BC.

With this in mind, in what ways could **BC Construction Safety Alliance** serve or support your company and industry to improve health and safety in your workplace?

Please provide up to three suggestions.

PROMPT IF LEFT BLANK: You missed this question. If you are unable to provide feedback, please click 'Next' to continue.

ALLOW 4 LINES FOR EACH BOX.





Q8. [multi choice; drag and drop]

Looking ahead, what kinds of services, resources, or information from **BC Construction Safety Alliance** would most help you improve health and safety in your workplace?

Please rank up to three items by dragging them over to the right.

Ranking (#1, #2, #3)

RANDOMIZE

- 1. Health & Safety resources (eg. booklets, videos, manuals)
- 2. Updates and notifications (eg. H&S news, regulatory changes, etc)
- 3. Training
- 4. Certification
- 5. Conferences, seminars and events
- 6. An in-person meeting or site visit
- 7. Anything else? (please drag over and specify)
- 97. Don't know [EXCLUSIVE]

ASK ALL Q9

Q9. [multi choice; drag and drop]

How would you generally prefer to receive information (eg. updates on new services and resources, H&S news, regulatory changes) from **BC Construction Safety Alliance**?

Please rank up to three items by dragging them over to the right.

Ranking <u>(#1, #2, #3)</u>

- 1. In-person
- 2. Personal/direct emails
- 3. Group e-mails (i.e., an e-newsletter subscription)
- 4. By phone
- 5. By mail
- 6. On the BC Construction Safety Alliance website
- 7. LinkedIn
- 8. Twitter
- 9. Facebook
- 10. Other (please specify)
- 11. No preference [ANCHOR AT BOTTOM]





Q9b. [single choice]

Generally speaking, how interested are you in receiving services, resources or information to improve heath and safety in your workplace?

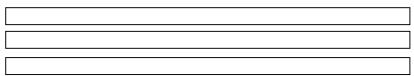
- 5. Very interested
- 4. Interested
- 3. Neutral
- 2. Not interested
- 1. Not at all interested
- 97. Don't know

Q10. [open end]

In every industry there is some degree of health and safety risk to workers. What do you think are the main health and safety risks in your industry?

Please list up to three.

PROMPT IF LEFT BLANK: You missed this question. If you are unable to provide feedback, please click 'Next' to continue.



Q11a: [open end, numbers only]

And for classification purposes...

Approximately how many workers does your company employ in BC?

Q11b. [single choice]

Which of the following best describes your role in your organization?

- 1. Business owner
- 2. Senior executive
- 3. Manager
- 4. Supervisor
- 5. Staff member
- 6. Dedicated health and safety position
- 7. Bookkeeper/accountant
- 8. Other (please specify)

SAVE & RESUME LATER





Industry Survey

Q12. [single choice]

Does your company/organization look after the bookkeeping or accounting for <u>other</u> businesses, including managing WorkSafeBC premium payments on their behalf?

- 1. Yes (we are an accounting/bookkeeping firm)
- 2. No

Those are all of our questions. Please click submit to complete your survey.

Thank you very much for your feedback. Your survey has been submitted!

