



Golden Visitor Information Services and Amenities Hub (VISAH) Estimates of Incremental Economic Benefits – PILOT PROJECT August 2017

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EXECUTIVE SUMMARY

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. In 2016, DBC announced a new corporate strategy in response to the trend identified in consumer research which indicated the demand for local, community-focused visitor information services. This provided TG with an opportunity to develop a visitor services program that is community-led, and industry driven. One component of the new program was the 2017 development, construction and opening of the Visitor Services and Amenities Hub (VISAH) near Highway 1 in Golden.

To determine the incremental economic benefits of the VISAH, a pilot research project was developed in the summer of 2017. The pilot was incorporated into the larger two-phase,¹ Golden visitor survey conducted both in the winter and summer of 2017. Additional on-site visitor survey questions were asked about reasons for stopping at the VISAH, the visitor services used, service and feature evaluation, and recommendations for service improvement. On the follow-up survey, Golden visitors were asked about visitor information were obtained while in Golden, the impact of the VISAH on visitor behaviour and how the impact of the VISAH on quality of visitor experiences in Golden. Also, methodology was developed and tested that determined the incremental economic benefits of the VISAH.

Visitor Information Services

- The top 5 reasons why visitors stopped at the VISAH were, to use the washroom (26%), obtain a map (20%), to take a break from driving (17%), for route information (11%) and to obtain information about adventure recreation activities (8%).
- VISAH visitors were most likely to obtain visitor information about activities (50%), attractions (43%), restaurants/dining (33%), events (22%) and accommodations (14%).
- About 60% of VISAH visitors spoke with a Visitor Information Counsellor.

Service and Feature Evaluation

- Overall, visitors gave excellent evaluation ratings of VISAH services and features. The top box² rating was 96% when visitors rated their overall experience at the VISAH. When VISAH services and feature components were evaluated, top box ratings were: friendliness and helpfulness of staff (100%), the convenient location (97%), quality of information provided (96%), pleasant atmosphere (95%) and quality of facilities (94%).

VISAH Impact on Visitor Behaviour

- On their current trip, the VISAH stimulated a portion of visitors to extend their stay and to learn about Golden visitor experiences.

¹ On-site survey followed by an online follow up survey. See the full 2017 Golden Summer Visitor Survey report for methodology details.

² Top box ratings are the percentage of people that responded with a 4 or 5 on the 1 - poor and 5 – excellent scale.

- Eighteen percent of VISAH users replied they would spend extra time in the Golden area due to information they obtained at the VISAH. Of those, half (9% of all visitors) stayed a few extra hours while the remaining half (another 9%) stayed an extra night in Golden.
- Almost half (46%) of the visitors replied they participated in new activities, went to new places or attended events in Golden because of information obtained at the VISAH. Of those, 56% replied they spent extra money in Golden due to participation in new activities or going to new places or events.
- In addition to behaviour changes on current trips, more than a quarter of visitors (28%) were likely to make another trip to Golden due to the information obtained at the VISAH.
- Most visitors (68%) agreed that the VISAH improved the overall quality of their experience in Golden. Quality of experience is extremely important because it leads to positive word of mouth (face-to-face and online) and a higher likelihood of a return trip.

Incremental Economic Benefits

- As a result of the VISAH, it is estimated that visitors spent an incremental \$192,264 due to additional time spent in Golden, plus another \$147,369 was spent on participation in new activities or at new places or events that weren't previously planned. This equals a total of \$340,333 of incremental visitor spending during August 2017 trips.
- Another \$960,377 will be spent on future trips as a direct result of information obtained at the VISAH.
- Altogether, the estimated total incremental economic benefits due to the VISAH visitors in August 2017 was \$1,300,710.

Limitations, Methodology Evaluation and Recommendations

- VISAH impacts on visitor behaviour was only studied in August 2017, peak season for the Golden tourism industry, study results should not be extrapolated to other months.
- This study did not study the impact of the VISAH on Golden locals. There are likely positive social impacts from the VISAH for the Golden community.
- As a result of a slightly delayed VISAH opening and researcher staff challenges, there were small samples sizes for the follow up survey results. As such, caution is warranted when interpreting follow-up survey results.
- This pilot project developed and evaluated methods for estimating incremental economic benefits of the Golden VISAH. While the methods outlined here were determined to be methodologically sound and defensible, the data used small follow-up survey sample sizes to estimate economic benefits. It is recommended that Tourism Golden prepare to conduct a larger, more comprehensive study to estimate the incremental economic benefits of the VISAH. The study should endeavour to span an entire peak season (e.g. June to September) and collect more online follow-up survey responses.

TABLE OF CONTENTS

Executive Summary	2
Table of Contents	4
1.0. Introduction	5
2.0. Methodology	5
2.1. Data Collection and Analysis.....	5
3.0. Results	7
3.1. Reasons for Stopping and Services Used	7
3.2. Information Obtained ¹	8
3.3. Evaluation of Services	9
3.4. VISAH Incremental Economic Benefits ¹	10
3.5. Visitor Characteristics	12
Appendices	13
Appendix A. Detailed Economic Benefit Calculations	14
Appendix B. August 2017 Selected VISAH Statistics.....	16
Appendix C. Visitor Survey Questions Related to the VISAH.....	17

Front Cover Photo Credit: Tourism Golden

1.0. INTRODUCTION

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. In 2016, DBC announced a new corporate strategy in response to the trend identified in consumer research which indicated the demand for local, community-focused visitor information services. This provided TG with an opportunity to develop a visitor services program that is community-led, and industry driven. One component of the new program was the 2017 development, construction and opening of the Visitor Services and Amenities Hub (VISAH) near Highway 1 in Golden.

As part of its marketing program, TG has evolving research activities that provide tactical marketing, marketing evaluation, experience evaluation and product and destination development insights. A large component of the research program are seasonal visitor surveys with these objectives:

1. Produce visitor data research reports for use by Tourism Golden and the Town of Golden,
2. Analysis of annual and seasonal data, and
3. Provide a capacity with which to evaluate the effectiveness and to demonstrate the success of marketing activity.

In the summer of 2017, two additional research objectives were added:

4. To understand how Golden visitors use of the VISAH, and
5. To determine method of estimating the incremental economic benefits of the VISAH.

2.0. METHODOLOGY

2.1. Data Collection and Analysis

Since 2013, Tourism Golden has conducted Golden visitor surveys to track visitor and trip characteristics, evaluate marketing programs and quality of visitor experiences. To do so, two-stage (on-site interview and online follow-up survey), multi-location survey design has been used to collect information from Golden visitors. Visitors have been interviewed at several tourist locations in the Golden area including; downtown Golden, Highway 1 corridor hotels and Kicking Horse Mountain Resort. After opening in early August 2017, Golden visitors were also interviewed at the VISAH site. Additional on-site visitor survey questions were asked about reasons for stopping at the VISAH, the visitor services used, service and feature evaluation, and recommendations for service improvement. On the follow-up survey, Golden visitors were asked about visitor information were obtained while in Golden, the impact of the VISAH on visitor behaviour and how the impact of the VISAH on quality of visitor experiences in Golden. (see Appendix C for related questions).

At the VISAH, a total of 343 people were approached to participate in the on-site survey after using the VISAH. Of those, 212 people (62%) agreed to participate, 37 were screened out because they were locals, vacation home property owners, staying in Golden for longer than 30 days, under 19 or had already completed the survey, which equaled 175 completed on-site visitor surveys. A total of 105 people agreed to complete the online, follow-up survey. Of those, 46 visitors completed the online survey for a response rate of 44%. In addition, on the follow-up survey at other locations around Golden, another 17 visitors replied that they went to the VISAH during their trip. These visitors were also asked the questions about the impact of the VISAH on their trip. This means, a total of 63 visitors assessed the impact of the VISAH on their trip to Golden.

These overall steps were used to estimate the incremental economic benefits of the VISAH in August 2017:

1. Estimate the total number of visitor parties that used the VISAH,
2. Use responses from the follow-up survey data to estimate the total number of visitor parties that stayed extra time, participated in new events/places/activities and replied they were likely to return to Golden because of information they obtained at the VISAH, and
3. Apply expenditure values to the above visitor party numbers to estimate incremental economic benefits due to the VISAH.

A detailed summary of estimated economic benefit calculations is found in Appendix A.

While response rates to the follow-up of visitor intercepted at the VISAH where good (44%), the number of completed follow-up surveys was small due to the delayed VISAH opening and research staffing challenges in late August. Due to small sample sizes on the follow-up survey, caution is warranted when interpreting results. Throughout the report, a *FU* symbol denotes data obtained from the follow-up survey.

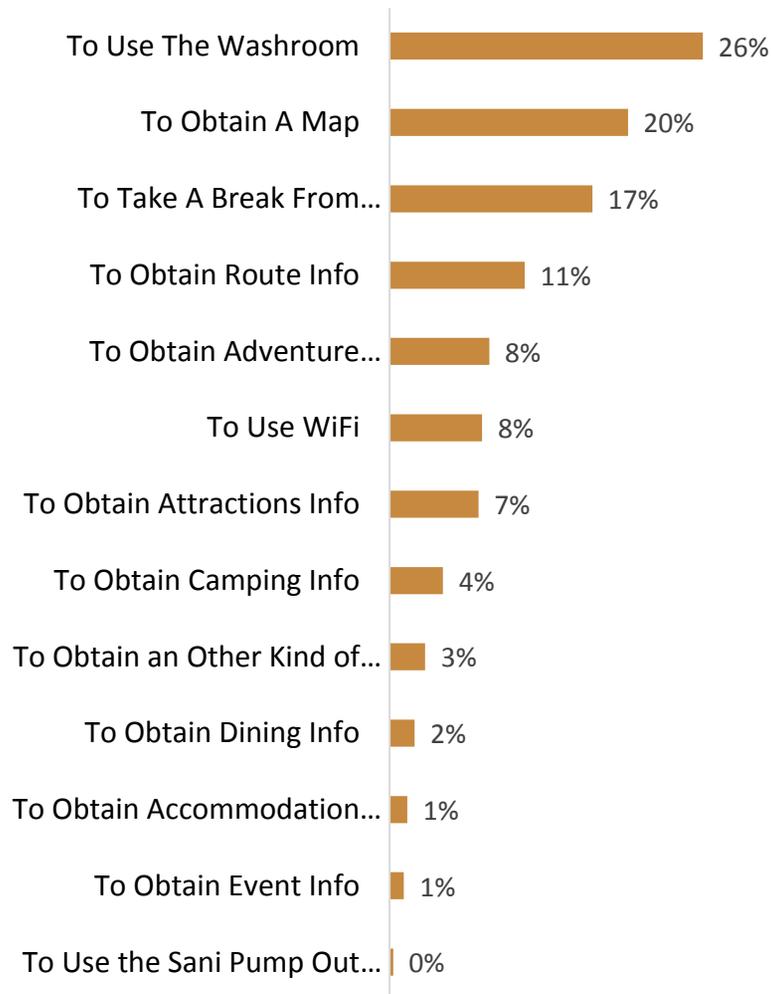
Other data analysis procedures were used to match those used in the overall analysis of Golden summer visitors. For more data analysis details, see the *2017 Golden Summer Visitor Survey* report.

3.0. RESULTS

3.1. Reasons for Stopping and Services Used

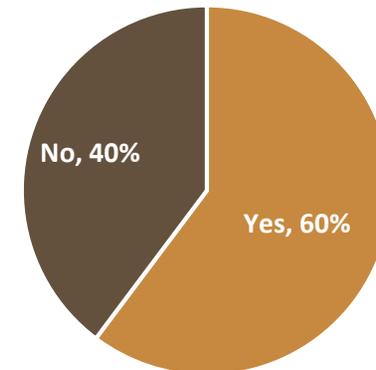
Reasons for Stopping at the VISAH

Percentage of VISAH Visitors



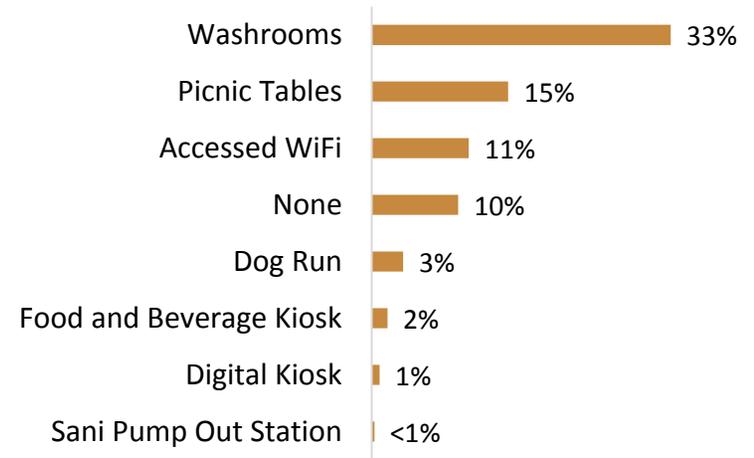
Speak with a Visitor Information Counsellor Today?

Percentage of VISAH Visitors



VISAH Services Used Today?

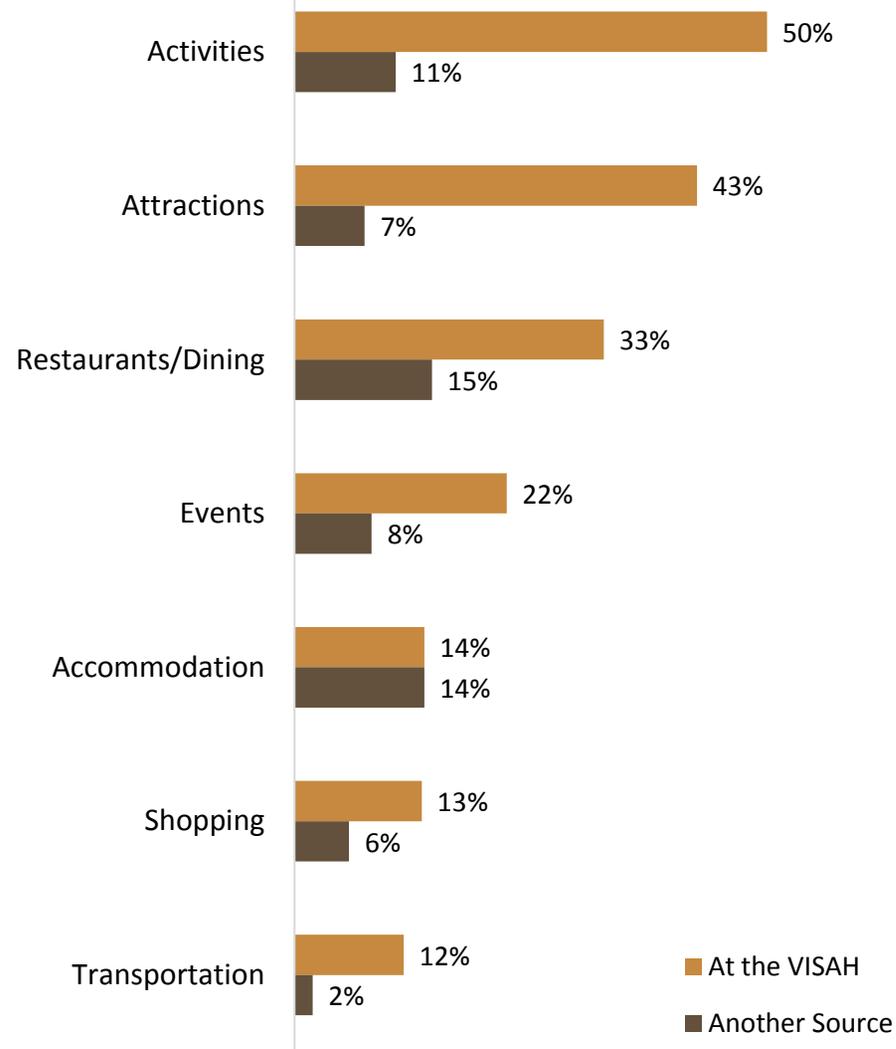
Percentage of VISAH Visitors



3.2. Information Obtained¹

Visitor Information Topics Researched and Obtained While in Golden?

Percentage of VISAH Visitors^{FU}

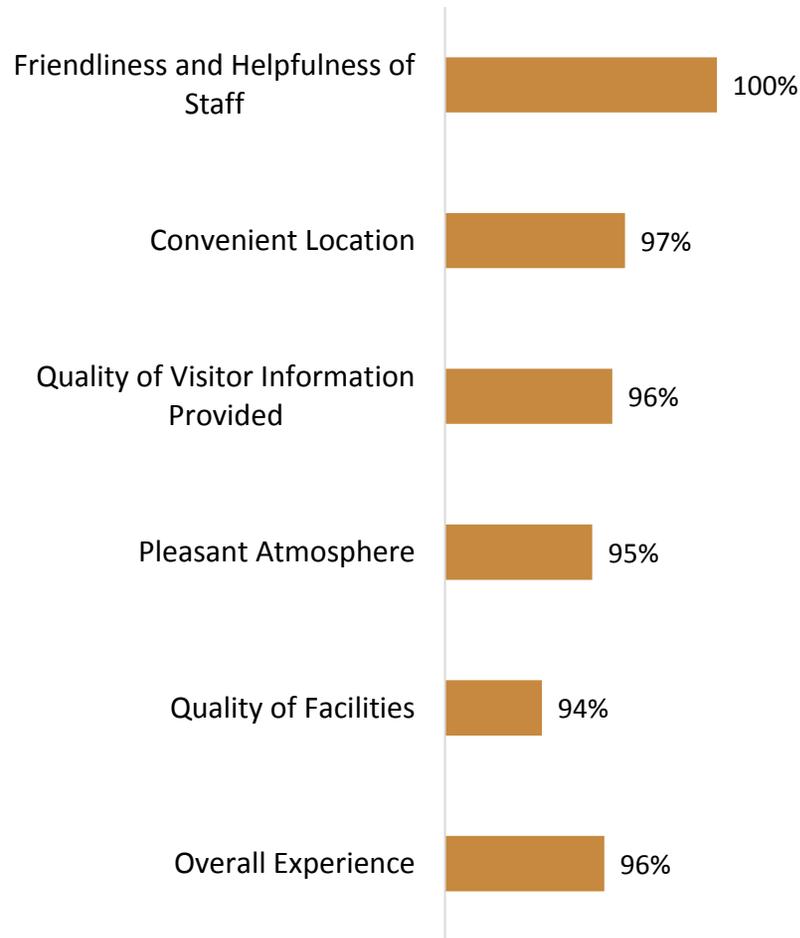


1. Due to small sample sizes, please use caution when interpreting.

3.3. Evaluation of Services

Evaluation of Features and Services

Top Box Results - Percentage of VISAH Visitors Responding 4 or 5 on Evaluatinn Scale



Scale: 1 = Very Poor and 5 = Excellent

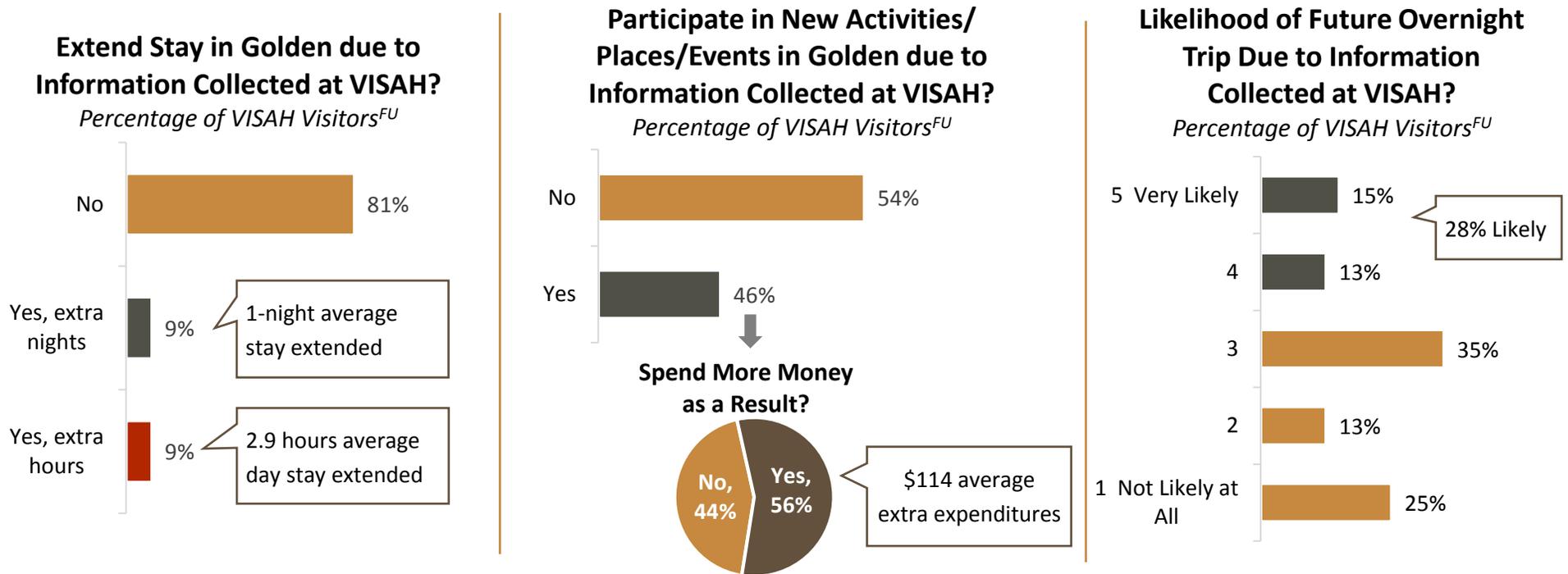
Component	Average Rating
Overall Experience	4.8
Friendliness and Helpfulness of Staff	4.4
Convenient Location	4.1
Quality of Visitor Information Provided	4.0
Pleasant Atmosphere	4.0
Quality of Facilities	3.8

Recommendations to Improve Visitor Services:

19 visitors made 24 recommendations (% of recommendations)

- Shade over Tables (25%)
- Improved Signage (21%)
- Include Retail (13%)
- Add Walking Trail (8%)
- Food Was Expensive (8%)
- Children's Play Area (4%)
- Bigger Dog Run (4%)
- Washroom Signage (4%)
- More Washrooms (4%)
- Guidebook to Glacier Park (4%)

3.4. VISAH Incremental Economic Benefits¹



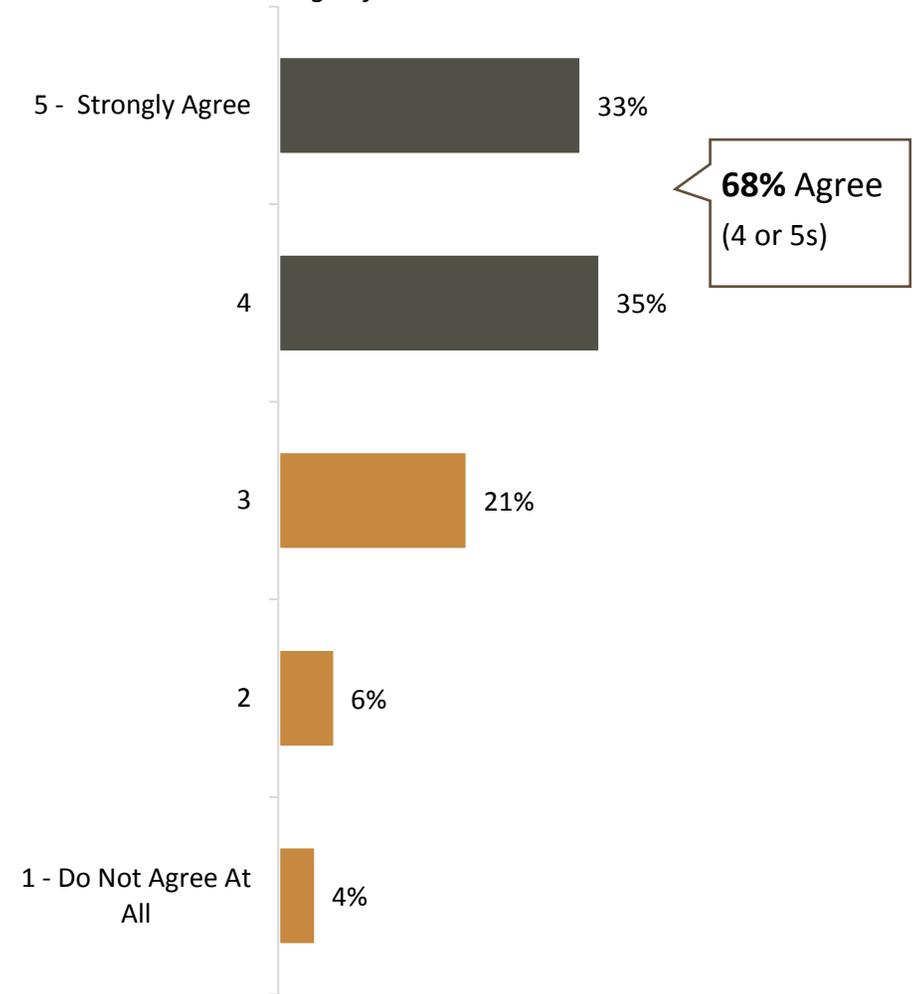
1. Due to small sample sizes, please use caution when interpreting.

New Activities/Places/Events Visitors Learned About at the VISAH^{FU}:

24 visitors learned about 35 activities (% of activities)

- Outdoor Activities (22%)
- Restaurants/Brew Pub (19%)
- Grizzly Bear Refuge/Kicking Horse Mountain Resort (14%)
- Natural Features/Parks (14%)
- Concert (8%)
- Northern Lights (6%)
- Kicking Horse Bridge (6%)
- Market (3%)
- Hotel (3%)

**Level of Agreement with Statement....
the VISAH Improved the Overall
Quality of Experience in Golden**
Percentage of VISAH Visitors^{FU}



1. Due to small sample sizes, please use caution when interpreting.

3.5. Visitor Characteristics

VISAH visitor and trip characteristic were compared to Golden visitors that did not go to the VISAH. The results revealed that VISAH visitors:

- Were like other Golden visitors in their market origin, party size and composition, age and gender.
- Were less likely to be travelling as part of a group.
- Were less likely to be travelling to Golden as a primary destination and more likely to be traveling to another destination or on a touring trip with no primary destination.
- Were more likely to be on a day trip and less likely to be on an overnight trip to Golden.
- Were more likely to be on their first trip to Golden.
- Were more likely to state that their primary reason for visiting Golden was to take a break from driving, but less likely to be in Golden for family vacation, to visit friends and relatives and for mountain biking.
- Spent less in Golden, due to the higher proportion of overnight visitors.
- Visited fewer places in Golden (e.g. restaurant, gas station).
- More likely to participate in hiking at Glacier and Yoho National Parks (but not in the immediate Golden area).

VISAH visitor characteristics were also compared to statistics collected by Visitor Services Counsellors. Results revealed that intercept data:

- Had slightly more day visitors (59%) compared to counsellor statistics (54%).
- Had more BC (18%) and Albertan (30%) visitors compared to counsellor statistics (11%, 20%, respectively). This resulted in fewer overseas visitors (24%) compared to counsellor statistics (39%).

APPENDICES

Appendix A. Detailed Economic Benefit Calculations

Appendix B. August 2017 Selected VISAH Statistics

Appendix C. VISAH-related Survey Questions

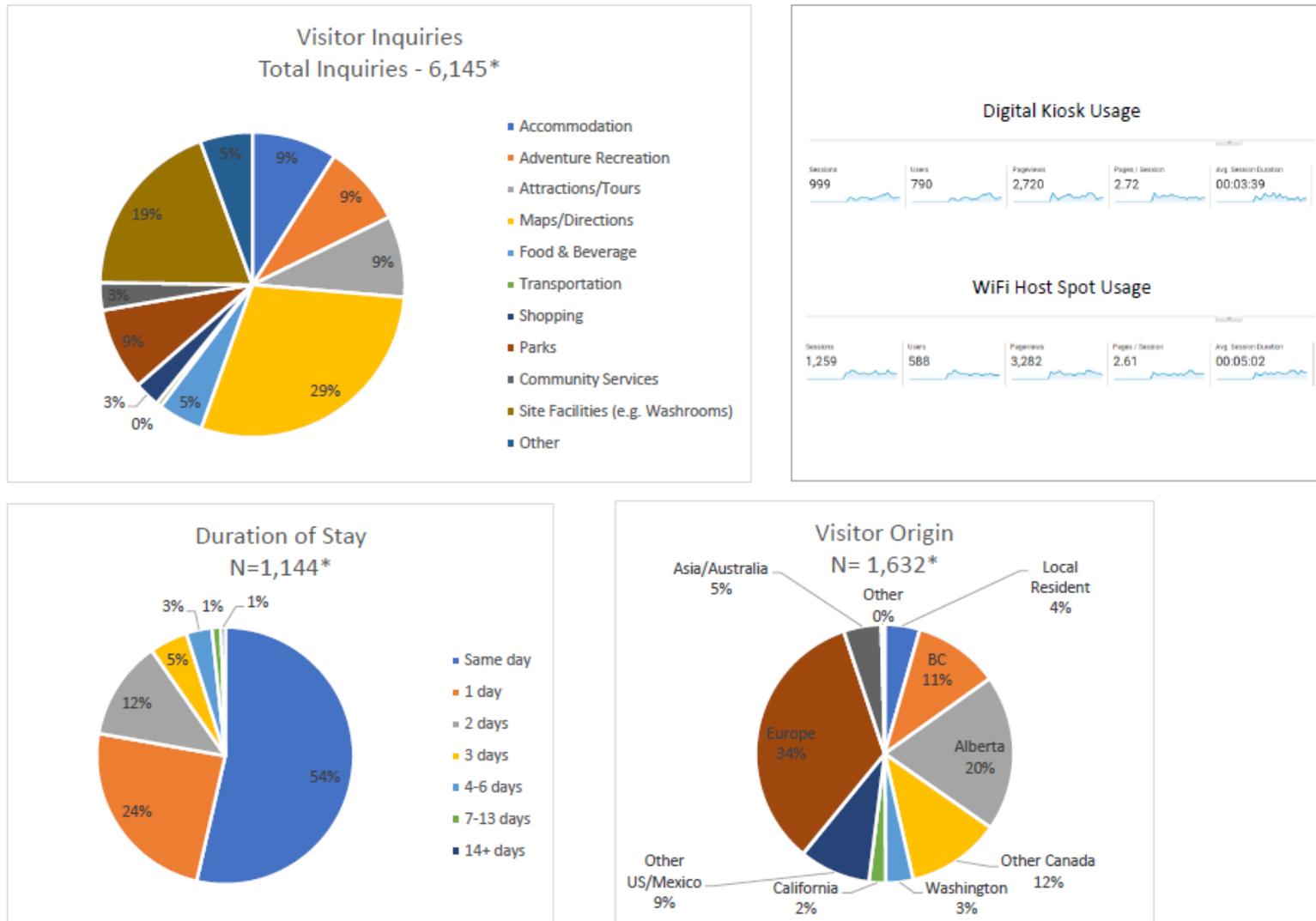
Appendix A. Detailed Economic Benefit Calculations

August 2017 Measure	Estimate	Source/Notes
Visitor Parties That Spoke with a Counsellor	2,987	TG VISAH Visitor Party Counts
% of Visitors Interviewed that Spoke with a Counsellor	60%	VISAH Intercept Question
Visitor Party Estimates		
Estimated Total Number of Visitor Parties That Stopped at VISAH	4,958	Visitor Parties That Spoke with a Counsellor/Percent That Said They Spoke with a Counsellor
Economic Benefits from Staying Extra Hours		
Percent of Parties that Stayed Extra Hours	9%	VISAH Intercept Question. Small Sample Size.
Visitor Party Estimate that Stayed Extra Hours	461	Estimated Total Number of Visitor Parties That Stopped at VISAH*Percent of Parties that Stayed Extra Hours
Average Extra Hours Stayed	2.9	VISAH Intercept Question. Small Sample Size.
Average Spending per Hour	\$57.42	Overall Intercept Questions (average daily expenditure/average hours in Golden)
Estimated Spending due to Extra Hours	\$76,773	Hourly Expenditures*Average Extra Hours Spent
Economic Benefits from Staying Extra Nights		
Percent of Parties that Stayed Extra Nights	9%	VISAH Intercept Question
Visitor Party Estimate that Stayed Extra Nights	461	Overall intercept question (average expenditure per night)
Average Extra Nights Stayed	1	VISAH Intercept Question. Small Sample Size.
Estimated Visitor Party Nights Stayed	461	Visitor Party Estimate that Stayed Extra Nights*Average Extra Nights Stayed
Average Spending per Night	\$252	Overall Intercept Questions. Average Expenditure of Overnight Visitors/Average Nights in Golden
Estimated Spending due to Extra Nights	\$116,191	Estimated Visitor Party Nights Stayed*Average Spending per Night
Economic Benefits from Learning About New Activities, Places or Events		
Percent of Parties that Learned About New Activities, Places or Events	46%	VISAH Intercept Question. Small Sample Size.
Visitor Party Estimate that Learned About New Activities, Places or Events	2,295	Estimated Total Number of Visitor Parties That Stopped at VISAH*Percent of Parties that Learned About New Activities, Places or Events
Percent of Parties that Spent Extra Money on New Activities, Events or Places	56%	VISAH Intercept Question. Small Sample Size.
Visitor Party Estimate that Spent Extra Money on New Activities, Places or Events	1,285	Visitor Party Estimate that Learned About New Activities, Places or Events*Percent of Parties that Spent Extra Money on New Activities, Events or Places
Average Expenditure on New Activities, Places or Events	\$ 114.64	VISAH Intercept Question. Small Sample Size.

Incremental Economic Benefits of the Golden VISAH – August 2017

August 2017 Measure	Estimate	Source/Notes
Estimated Spending due to New Activities, Places or Events	\$147,369	Visitor Party Estimate that Spent Extra Money on New Activities, Places or Events*Average Expenditure on New Activities, Places or Events
Economic Benefits from Future Overnight Trips		
Percent of Visitor Parties that are Likely (4,5) to Take a Future Overnight Trip	28%	VISAH Intercept Question. Small Sample Size.
Visitor Party Estimate that are Likely to Take a Future Overnight Trip	1,363	Estimated Total Number of Visitor Parties That Stopped at VISAH*Percent of Visitor Parties that are Likely (4,5) to Take a Future Overnight Trip
Average Spending Per Overnight Trip	\$704	Overall Intercept Question (Average Overnight Trip Expenditure)
Estimated Spending due to Future Overnight Trips	\$960,377	Visitor Party Estimate that are Likely to Take a Future Overnight Trip*Average Spending Per Overnight Trip
Estimated Incremental Economic Benefits		
Estimated Spending due to Extra Hours	76,773	
Estimated Spending due to Extra Nights	\$116,191	
Estimated Spending due to New Activities, Places or Events	\$147,369	
Estimated Spending due to Future Overnight Trips	\$960,377	
Total Estimated Benefits	\$1,300,710	

Appendix B. August 2017 Selected VISAH Statistics



*The total values of each base vary according to the data collected. A total of 5,384 visitors spoke to counsellors however not all visitors provided their duration of stay or origin. The number of visitor inquiries is larger than the number of visitors as some as for multiple information.

August 2017

Appendix C. Visitor Survey Questions Related to the VISAH

C1. On-Site Interview

Now just a few questions about this visitor services and amenities hub location.

Q27. Why did you stop here (at the VISAH) today? - **go to q28**

Don't read responses, check all that apply

1. To Obtain A Map
2. To Obtain Route Info
3. To Obtain Accommodation Info (Not Camping)
4. To Obtain Camping Info
5. To Obtain Adventure / Recreation Activity Info
6. To Obtain Attractions Info
7. To Obtain Event Info
8. To Obtain Dining Info
9. To Take A Break From Driving
10. To Use WiFi
11. To Use The Washroom
12. To Use the Sanitation/Pump Out Station
13. Other Kind of Information/Service _____

Q28. Did you or anyone in your travel party speak with a Visitor Information Counsellor here today? - **go to q29**

1. Yes
2. No
3. Don't Know

Q29. What other services have you used here today? - **go to q30**

Read the list and check all that apply.

1. Washrooms
2. Accessed WiFi
3. Digital Kiosk
4. Sani Pump Out Station
5. Food and Beverage Kiosk
6. Picnic Tables
7. Dog Run
8. None

Q30. Overall, on a scale where 1 is 'very poor' and 5 is 'excellent' how would you rate the following features and services and your **overall experience** here at the VISAH? How would you rate the..... - **go to q31**

1. Friendliness and Helpfulness of Staff
2. Quality of Visitor Information Provided
3. Pleasant Atmosphere
4. Quality of Facilities
5. Convenient Location
6. Overall Experience

Q31. Do you have any recommendations to improve the visitor information services offered here?

Type in 'None' if there aren't any.

- **go to q32 (if overnight and staying at paid accommodation)**

- **go to q33 (if overnight and staying at VFR or day or unknown length of stay)**

C2. Follow-Up Online Survey

Section 3. Next, we are interested in learning about the visitor information services that you used while in Golden.

FOR visitors that we spoke with at NON-VISAH sites.

In 2017, Tourism Golden invested in a Visitor Information Services and Amenities Hub (VISAH) which is a visitor information centre on the Trans Canada Highway.

Q16. Did you go to the VISAH?

- YES **go to Q17**
- NO **go to Q23**

FOR visitors that we spoke at the VISAH.

While you were in Golden, we spoke with you at the Visitor Information Services and Amenities Hub (VISAH). We are interested in how the visitor information you obtained and how it impacted your trip and possibly future trips to Golden.



Q17. First, what kinds of visitor information topics did you research and obtain at while in Golden? Did you obtain it at the VISAH or via another source (e.g. online or from someone or somewhere else in Golden)?

Please select the kinds of information you obtained at the VISAH, through another source or if you did not research that topic. It's okay to select both the VISAH and another source of information for one topic.

	At the VISAH	Another Source in Golden	Did Not Research This Topic
1 Accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Restaurants/Dining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q18. Did you extend your stay in Golden due to the information you collected at the VISAH?

- YES, I stayed a few extra hours (less than 1 night). How many extra hours? _____
- YES, I stayed for at least one extra night. How many extra nights? _____
- NO

Q19. Did you participate in any new activities, go to new places or attend events in Golden that you didn't previously know about?

- YES, What were they? _____ **go to 20**
- NO **go to 21**

Q20. Did this result in spending additional money that you hadn't anticipated?

- YES, About how much additional money did you spend? _____
- NO

Q21. On a scale of 1 to 5, how likely are you to take a future **overnight** trip to Golden as a result of the information obtained at the VISAH?

	1 – Not at All Likely	2	3	4	5 – Very Likely	99 Don't know/Prefer not to answer
1 Future Overnight Trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q22. Please state your level of agreement with this statement, The visitor information I obtained **while I was at the VISAH** in Golden resulted in me or my travel party... **go to 30**

	1 – Do Not Agree At All	2	3	4	5 – Strongly Agree	99 Don't know/Prefer not to answer
1 Improving the Overall Quality of My Experience in Golden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>