



# Tourism Golden

2023 Stakeholder Survey Report

January 2024



# Executive Summary

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Columbia Shuswap Regional District Area A (excluding Yoho National Park) since 2007. In September 2023, TG initiated its third stakeholder survey to understand Stakeholder perceptions. The previous stakeholder survey was conducted in 2021 and 2016 with the latest being done to inform development of TG's 2022-2027 Strategic Plan. Results obtained here will be used to refine the annual planning and program delivery.

## APPROACH

Align Consulting Group worked with TG to develop content for the online survey, as well as administered, conducted analysis and developed this report. This year saw a 41% response rate, up from 27% in 2021 but down from the 50% response rate achieved in 2016. In 2023, community partners (50%) had the highest response rates followed by food and beverage, retail or tourism services (47%), accommodation businesses (37%), and activities/attractions (36%).

## RESULTS

### GENERAL PERCEPTIONS OF INDUSTRY

- Stakeholders understand the importance of tourism to their business/organization and to both Golden's and BC's Economies.
- Stakeholders are supportive of responsible tourism growth in Golden and are relatively confident their staff have the knowledge to provide tourist information to visitors.
- The majority of stakeholder feel that tourism development is currently at the right level and the pace of development is good. However, they would like to see visitor growth in the next 5 years.

# Executive Summary

## TOURISM GOLDEN AWARENESS & PERFORMANCE

- Familiarity with Tourism Golden has remained steady with the majority (68%) of stakeholders being familiar with TG's programs and services.
- Stakeholders are most aware of Tourism Golden's annual publications (85%). Tourism Golden's support for professional/semi-professional event support, the paid print advertising, content and asset creation, and the Golden destination app also have strong awareness levels.
- Performance on the 8 key objectives identified in the 2022-2027 strategic plan was positive for most statements. In fact, 62% think that Tourism Golden has done a 'very good' or 'excellent' job at increasing overall value of the tourism economy in the past two years. However, there are several areas for improvement, most notably is increasing shoulder season occupancy and rates with 14% rating performance as 'poor'. It should be noted that the effect of Tourism Golden's efforts were impacted by the Kicking Horse Canyon Project which closed Highway 1 for multiple weeks in the shoulder seasons for the past three years. Although there was an alternative route, it did add nearly 90 minutes to visitors' travel coming from East of Golden.
- From an operating perspective, the majority of stakeholders rate Tourism Golden as 'very good' or 'excellent' on all presented business performance measures. The top two rated elements are that TG advocates for tourism in Golden and the region (76% rated as 'very good' or 'excellent') and TG communicates with tourism stakeholders regularly (67% rated as 'very good' or 'excellent').
- Tourism Golden's overall performance was strong and consistent with previous results. In fact, 67% of stakeholders rated TG's overall performance as 'very good' or 'excellent'.

# Executive Summary

## PRIORITIES MOVING FORWARD

- On the high-level, both Destination Marketing and Destination Management are key to the future of tourism in Golden. Destination Management emerged as more essential (41% compared to 32% for Destination Marketing) so this should be considered when making budgeting and tactical decisions.
- The top priorities overall are to support the sustainable and responsible growth of visitor volumes and tourism revenues (84%), and encourage economic sustainability of tourism in Golden (81%). Building relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met (80%), measuring the value of visitors' economic impact (76%), targeting visitors that are respectful of environment and people (74%) and providing visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden) (74%) were also high priorities.
- The largest barrier to tourism growth echo the current economic situation in BC and Canada: housing and labour. For Golden, transportation is also a large barrier to growth. For housing, it is both affordability (84%) and shortage/availability (79%). Transportation to and within Golden are seen as notable barriers to growth while lack of skilled labour rounds out the top five perceived barriers.

## SUSTAINABILITY INITIATIVES

- Increasing shoulder season visitation and attracting and retaining tourism labour were the top-rated sustainability priorities.

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# BACKGROUND & OBJECTIVES

# Background and Objectives

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. The not-for-profit organization's vision is, *'To inspire target visitors to explore and experience Golden'*. In September 2023, TG initiated its third stakeholder survey to understand Stakeholder perceptions. The previous stakeholder surveys were conducted in 2016 and 2021 and were used to inform the development of Tourism Golden's respective Strategic Plans. Results obtained in 2023 will be used to inform annual planning of the delivery of the 2022-2027 Strategic Plan and is to be included in the annual MRDT reporting.

Similar to previous years, the primary objectives were to:

1. Gather perceptions about the performance of TG, and
2. Capture ideas about the future directions of tourism in Golden and TG.

A few elements to understand when reading this report include:

- Where possible, results were compared to 2016 findings. However, 2023 saw an overhaul to many of the survey questions.
- TG's primary funding comes from 3% Municipal and Regional District Tax (MRDT) rate. The MRDT is collected by accommodation businesses. Being the recipient of the 3% MRDT, TG is required to conduct an annual stakeholder survey to assess the level of awareness of tourism marketing activities, and satisfaction with the use of MRDT funds.
- The effect of Tourism Golden's efforts were impacted by the Kicking Horse Canyon Project which closed Highway 1 for multiple weeks in the shoulder seasons for the past three years. Although there was an alternative route, it did add nearly 90 minutes to visitors' travel coming from East of Golden.

# METHODOLOGY

# Methodology - Approach

- Align Consulting Group (ACG) has provided research support to TG since 2016. In this case, ACG provided survey administration, data cleaning, analysis and report writing.
- ACG worked with TG to develop content for the stakeholder survey. Where possible, questions were asked that were similar to 2021 and 2016; however, the tool was overhauled in 2023. Also, the Destination BC's MRDT Stakeholder Survey Guidebook<sup>1</sup> was used to assist in questionnaire development.
- TG provided ACG with an email distribution list of 207 emailable stakeholders and 3 of those were removed because they were duplicates, closed or the email address was undeliverable. This resulted in 204 stakeholders that were sent the stakeholder survey via email.
- These stakeholders were sent the survey via email. To encourage responses, two email reminders were sent. In addition, a personalized follow up email was sent from Align's email. The survey was available between November 3, 2023 and November 17, 2023.
- For response rate analysis, stakeholders were grouped into 4 groups, including:
  1. Accommodations
  2. Activity or Attractions
  3. Food and Beverage, Retail or Tourism Services
  4. Community Group, Non-Profit or Local Government (Community Partners)

Small sample sizes inhibited further analysis by these groups.

# Methodology - Analysis



Responses were summarized with percentages.



Don't Know/Not Applicable were removed from analysis.



'Top Box' analysis was conducted for scale questions. This means the top two responses were added together.

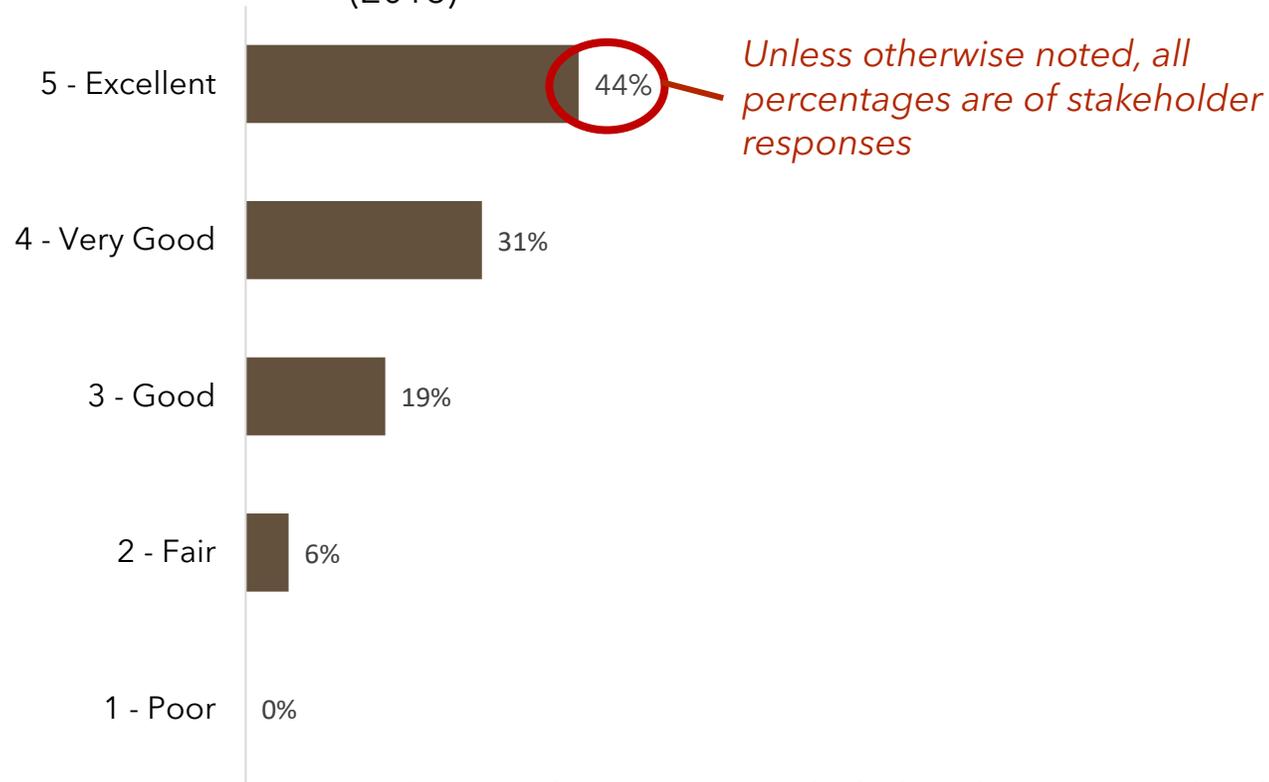


- Where possible, comparisons to 2016 and 2021 were made.  
-Differences were noted if 'top box' responses were more than 5% different.

# Methodology - Analysis

## TIPS FOR READING

### Tourism Golden Overall Performance (2016)



### Open-Ended Responses

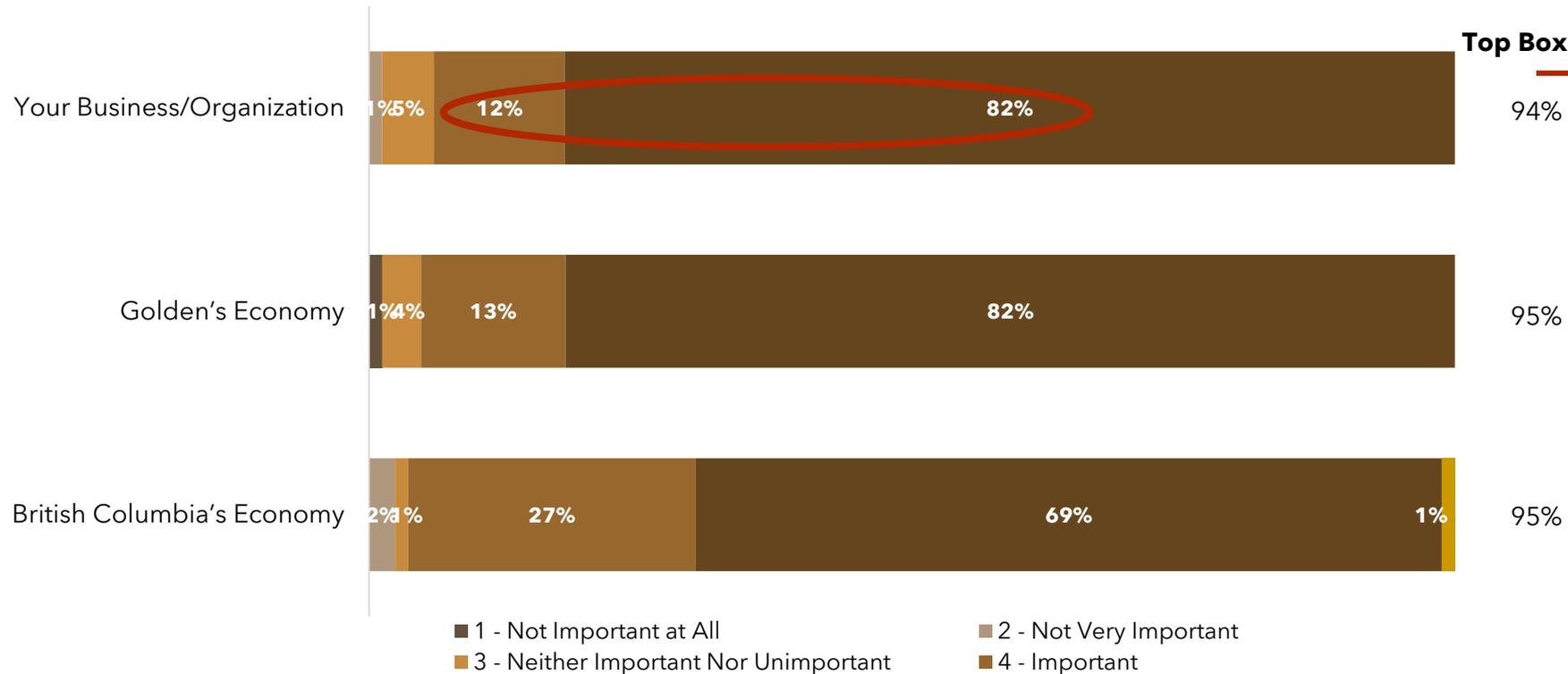
Several questions were asked with open-ended responses. Verbatim responses are summarized in *MVBoli* font. For the most part, they have not been edited and are meant to provide more depth to understanding the stakeholder perspective.

*The actual question is included as the footer of the slide. Also, this section includes the number of responses (n) and analysis details. The entire questionnaire is also in the appendix.*

# Methodology - Analysis

## TIPS FOR READING

**Importance of Tourism Industry**  
(% of Stakeholders)



**Top Box**

— *Top Box analysis is equal to the percentage of the top two response categories. In this example the top box is 94%. The top box is also listed to the right of the chart.*

# Methodology - Survey Responses

- In total, 96 people clicked on the survey link via that email or open-link distribution. When duplicates and responses with no data were removed, there were 83 responses. This equals a 41% response rate.
- The distribution of stakeholders as well as the response rate for each group are detailed below.

STAKEHOLDER GROUPS	NUMBER OF STAKEHOLDERS (% All Stakeholders)	NUMBER OF RESPONSES (% All Responses)	RESPONSE RATE
Accommodations	82 (40%)	30 (36%)	37%
Activities and Attractions	42 (21%)	15 (18%)	36%
Food and Beverage, Retail and Tourism Services	60 (29%)	28 (34%)	47%
Community Partner	20 (10%)	10 (12%)	50%
<b>TOTAL</b>	<b>204</b>	<b>83</b>	<b>41%</b>

# RESULTS

# General Perceptions About the Tourism Industry

# Importance of the Tourism Industry

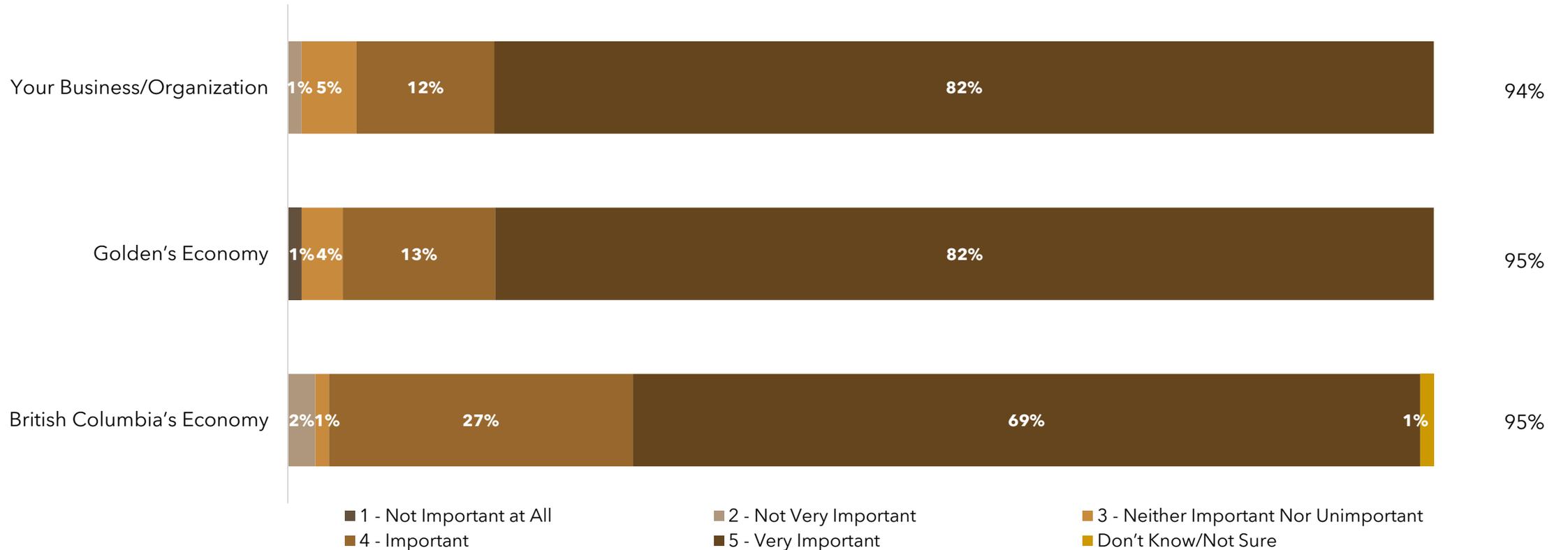
Stakeholders were asked how important is the Tourism industry on three aspects.

- Overall, nearly all stakeholders view tourism as 'important' or 'very important' for their business/organization (94%), Golden's economy (95%), and British Columbia's economy (95%).
- Looking at it in more detail we see that 82% note that tourism is 'very important' to their business/organization and to Golden's economy while only 69% think it is 'very important' to BC's economy.

# Importance of the Tourism Industry

**Importance of Tourism Industry**  
(% of Stakeholders)

Top Box



# Agreement with Tourism Golden

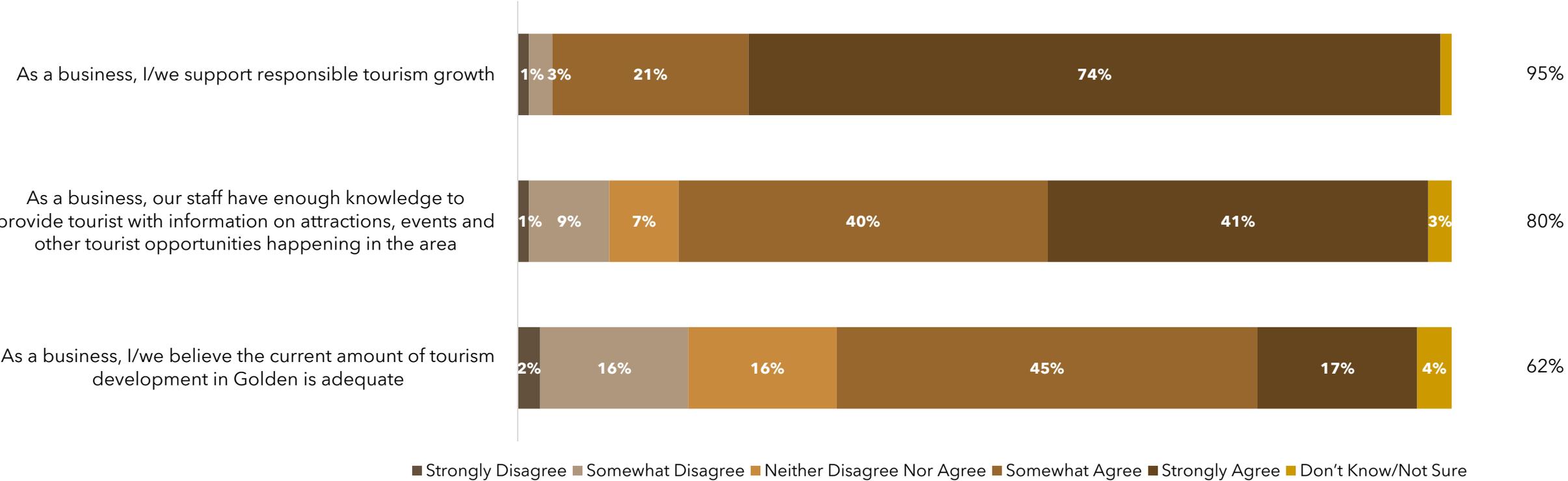
Stakeholders were asked to rate their level of agreement with three statements about Tourism Golden and the Tourism industry.

- Generally, stakeholders say that as a business/organization they support responsible tourism growth (95% 'somewhat' or 'strongly' agree).
- They are less confident, but still agree, that their staff has enough knowledge to provide tourists with information on attractions, events and other tourist opportunities happening in the area (80% 'somewhat' or 'strongly' agree).
- Agreement with the amount of tourism development in Golden being adequate is a little more mixed with 62% 'somewhat' or 'strongly' agreeing while 18% 'somewhat' or 'strongly' disagree.

# Agreement with Tourism Golden

**Agreement with Tourism Golden**  
(% of Stakeholders)

**Top Box**



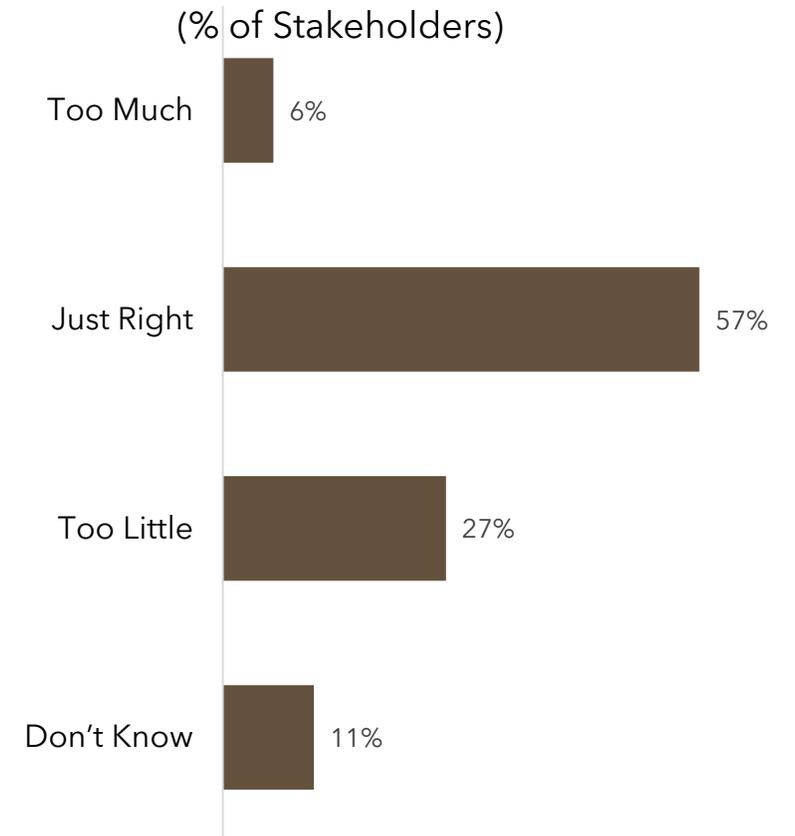
Please rate your level of agreement with the following statements:? Scale: 1 = Strongly Disagree, 5 = Strongly Agree, n=83.

# Current Level of Tourism Development in Golden

Stakeholders were asked their opinion on the current level of tourism development in Golden .

- Stakeholders are generally satisfied with the current level of tourism development in Golden. In fact, 57% say it is 'just right' while 27% feel that there is 'too little' and, in contrast, 6% think there is 'too much'.

## Current Level of Tourism Development in Golden

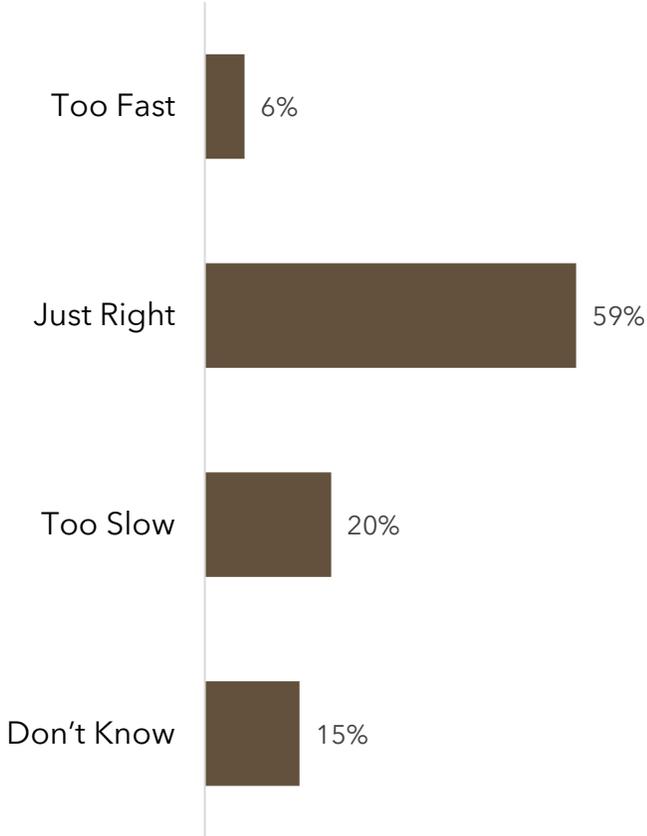


# Speed of Tourism Development in Golden

Stakeholders were asked their opinion on the speed of tourism development in Golden.

- Nearly six-in-ten (59%) of stakeholder are happy with the speed of tourism development and feel that it is 'just right'.
- That said, 20% view it as too slow and 6% say development in Golden is too fast.

**Speed of Tourism Development in Golden**  
(% of Stakeholders)

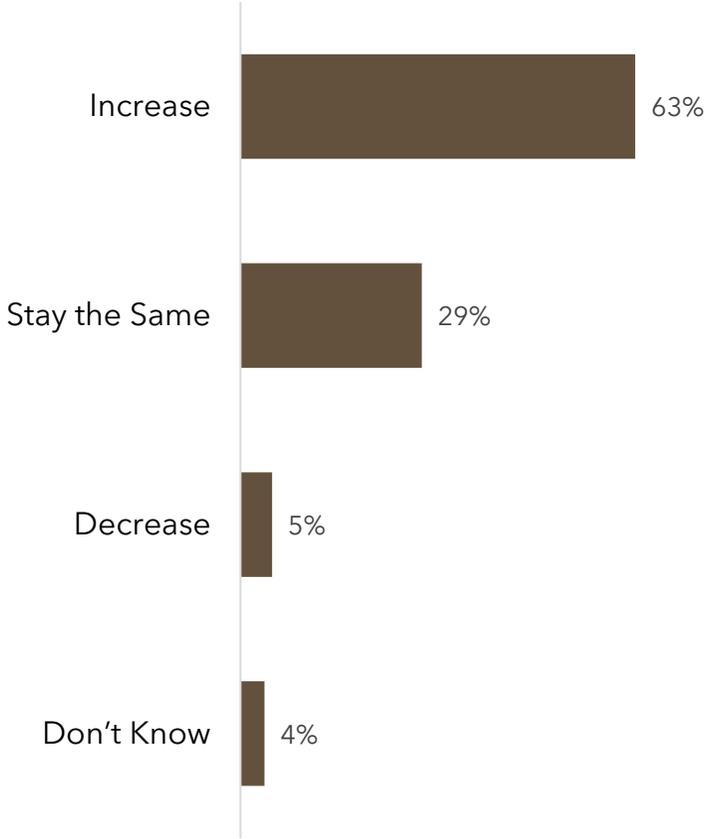


# Visitor Volume in Golden in the Next Five Years

Stakeholders were asked their opinion on whether they would like visitor volume in Golden to increase, decrease or stay the same in the next five years.

- Nearly two-thirds of stakeholders (63%) want visitors volume to increase in the next five years while 29% would like it to stay the same.
- Interestingly 5% note a desire to see fewer visitors in Golden. This could be the start of push back on unencumbered visitor volume growth. Although it is not of concern at this time, it is a something to be aware of and track closely.

**Visitor Volume in Golden in Next 5 Years**  
(% of Stakeholders)



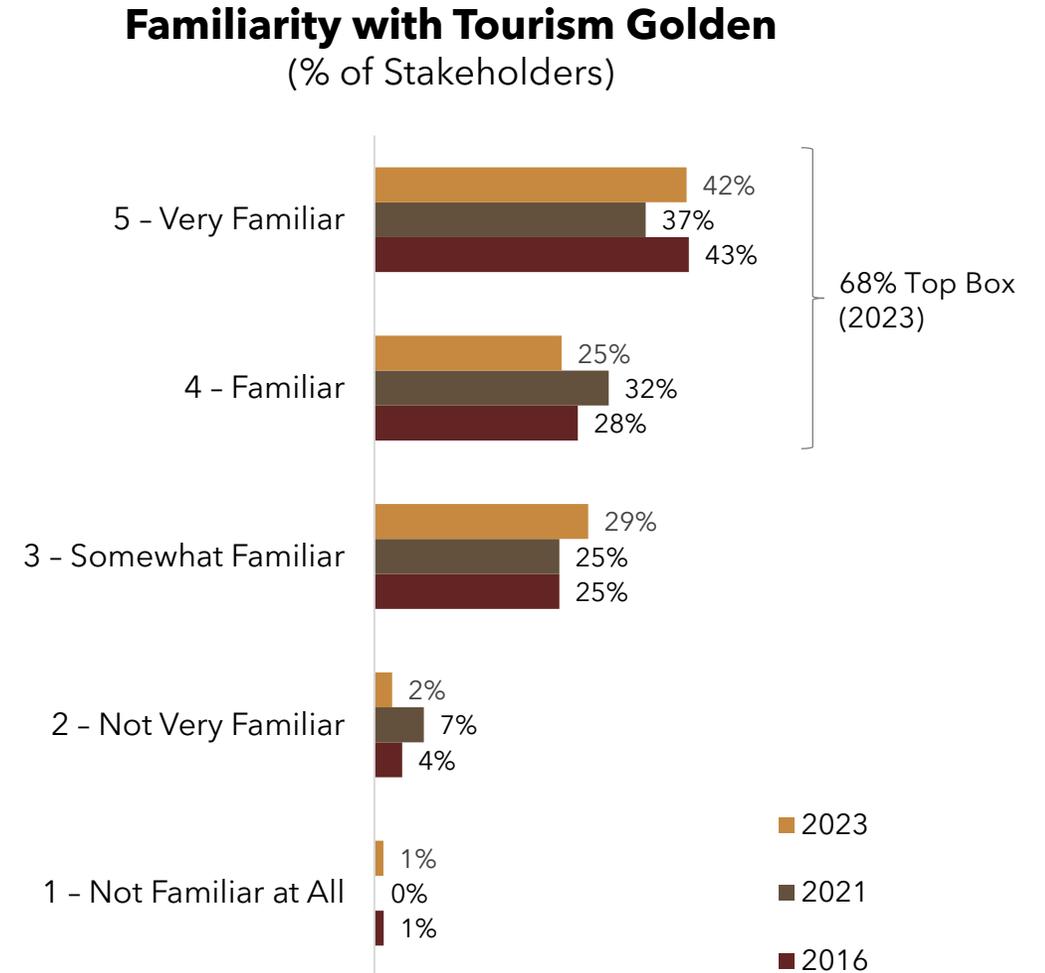
Would you like visitor volume in Golden to increase, decrease or stay the same in the next five years? n=80.

# Stakeholder Awareness of Tourism Golden and Its Performance

# Familiarity with Tourism Golden

Stakeholders were asked how familiar they were with the services and programs offered by TG.

- A total of 68% of stakeholders were familiar or very familiar with TG. This result was similar to 2021 and 2016 results (68% and 70%, respectively).
- This suggests that Tourism Golden is doing a good job, at a high-level, at communicating their role to stakeholders.

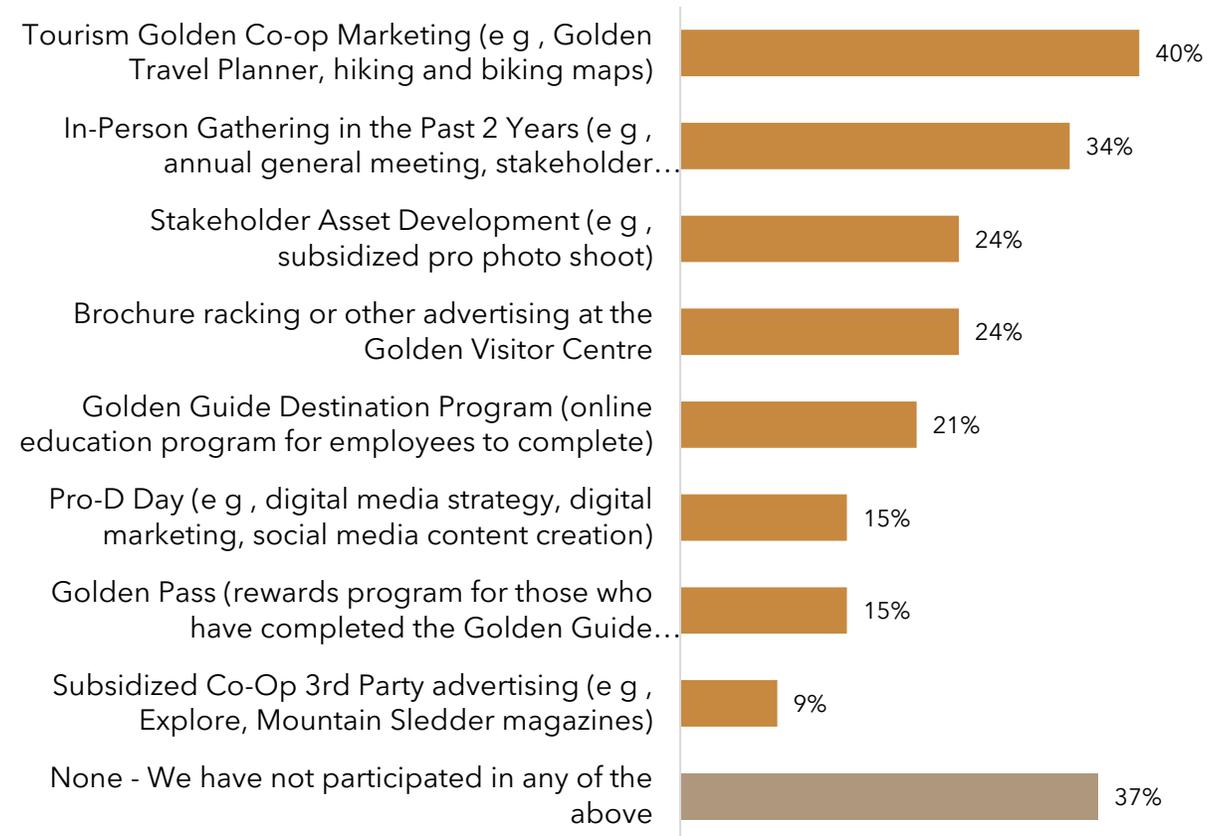


# Participation in Tourism Golden Programs

Stakeholders were asked about participation in TG programs.

- 63% of stakeholders participated in at least one TG program.
- The most popular program participation was in co-op marketing (40% of stakeholders participated), followed by in-person gatherings such as AGM (34%), stakeholder asset development program (24%) and brochure racking or other advertising in the Golden Visitor Centre (24%).

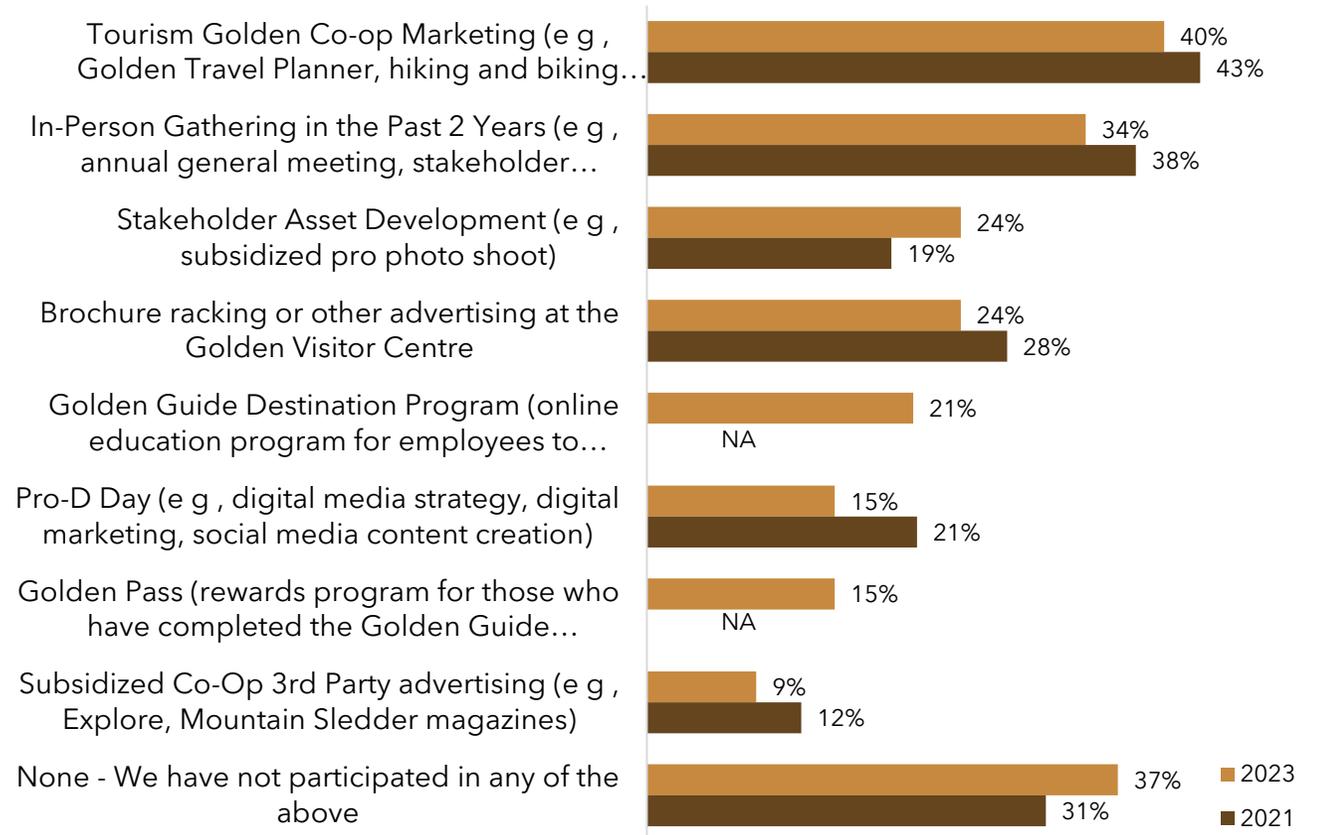
## Tourism Golden Program Participation (% of Stakeholders)



# Participation in Tourism Golden Programs

Looking at the comparison between 2023 and the 2021 survey we see that generally participation is similar. That said, fewer stakeholders do report participating in any programs (63% down from 69% in 2021). Given this overall decrease in participation, many of the programs see slightly smaller proportion of stakeholders noting they participated. The largest decrease in participation was the Pro-D Day event which was down to 15% from 21%; however, the Stakeholder Asset Development increased from 19% to 24% this year.

**Tourism Golden Program Participation**  
(% of Stakeholders)



Over the past two years (2022-2023), what Tourism Golden programs has your business or employees participated in? n=82 (2023). 82 stakeholders provided 179 responses. n= 58 (2021), 58 stakeholders provided 111 responses.  
The percent totals to more than 100% because stakeholders could participate in multiple programs.

# Awareness of Tourism Golden Programs

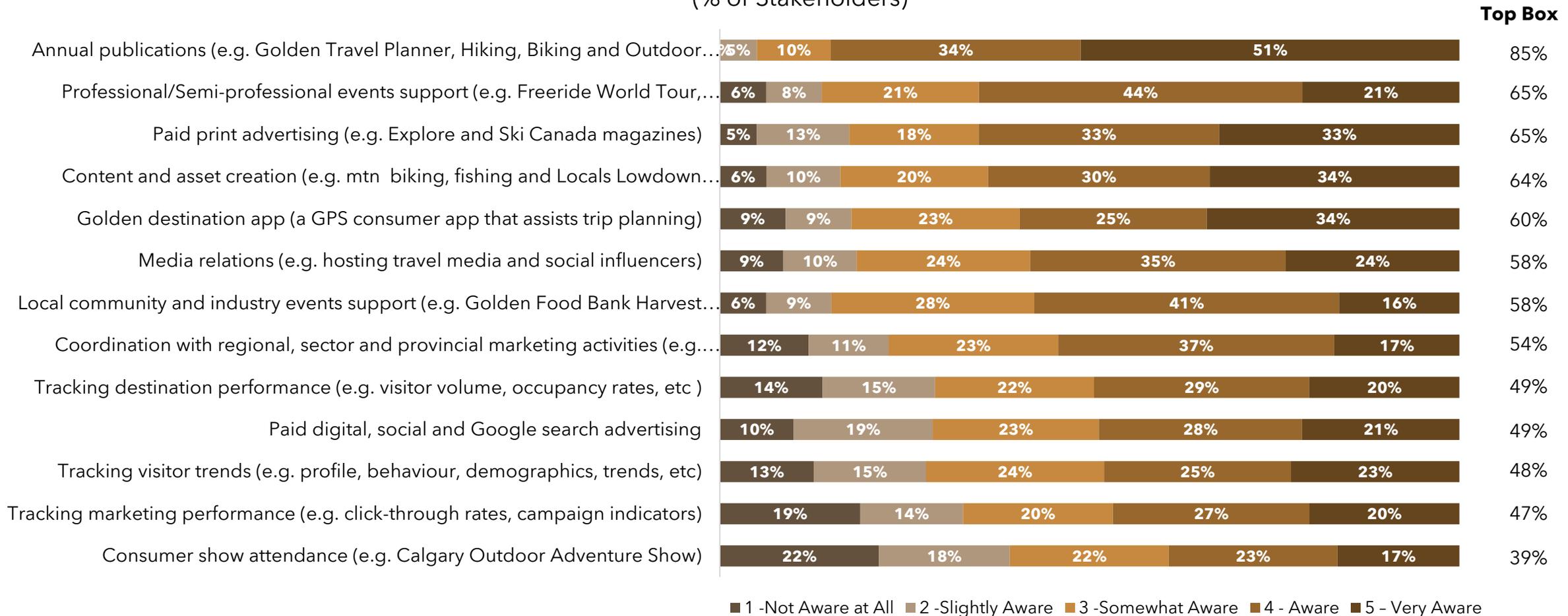
Stakeholders were asked their awareness levels with 13 marketing activities that Tourism Golden has implemented over the past two years (see next page for details).

- Overall, stakeholders were most aware of the annual publications (85%), professional/semi-professional event support (65%), paid print advertising (65%), content and asset creation (64%), and the Golden destination app (60%).
- Consumer show attendance (39%) has the lowest awareness amongst stakeholders.

# Awareness of Tourism Golden Programs

## Awareness of Tourism Golden Marketing Activities

(% of Stakeholders)



# Awareness of Tourism Golden Programs

Tourism Golden Marketing Programs	2023 Top Box	2021 Top Box
Annual publications (e.g. Golden Travel Planner, Hiking, Biking and Outdoor Discovery maps)	85%	91%
Professional/Semi-professional events support (e.g. Freeride World Tour, Golden 24)	65%	76%*
Paid print advertising (e.g. Explore and Ski Canada magazines)	65%	78%
Content and asset creation (e.g. mtn biking, fishing and Locals Lowdown videos and user-generated content generation)	64%	60%
Golden destination app (a GPS consumer app that assists trip planning)	60%	NA
Media relations (e.g. hosting travel media and social influencers)	58%	59%
Local community and industry events support (e.g. Golden Food Bank Harvest Dinner, Chamber's Business & Community Excellence Awards - Tourism Award, Golden Pride)	58%	NA
Coordination with regional, sector and provincial marketing activities (e.g. Golden Triangle, Kootenay Dirt)	54%	55%
Tracking destination performance (e.g. visitor volume, occupancy rates, etc )	49%	NA
Paid digital, social and Google search advertising	49%	55%
Tracking visitor trends (e.g. profile, behaviour, demographics, trends, etc)	48%	NA
Tracking marketing performance (e.g. click-through rates, campaign indicators)	47%	NA
Consumer show attendance (e.g. Calgary Outdoor Adventure Show)	39%	48%*

On a scale of 1-5, where 1 - Not at all aware and 5 - Very aware, how aware are you of the following 13 marketing activities that Tourism Golden has implemented over the past 2 years? Scale: 1 = Not Aware At All, 5 = Very Aware, n=79-83 (2023), n=60 (2021). This question was not asked in 2016. \* Note that the wording was slightly different in 2021.

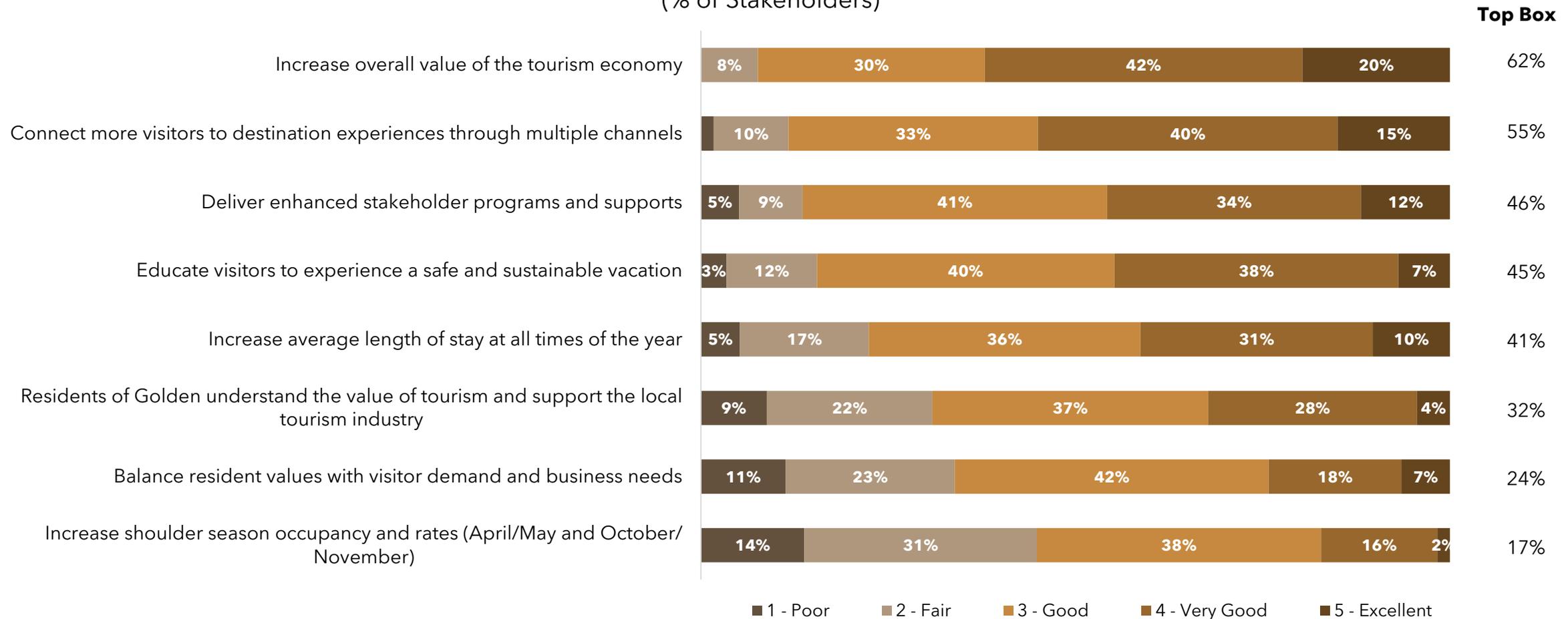
# Tourism Golden Strategic Objective Performance

Stakeholders were asked to rate performance on the 8 key objectives identified in the 2022-2027 strategic plan and related to the four themes that directly impact the tourism industry including economic contribution; visitor experience; stakeholder experience; and resident/community experience (see next page for details).

- Nearly two-thirds (62%) think that Tourism Golden has done a 'very good' or 'excellent' job at increasing overall value of the tourism economy in the past two years.
- Most of the 8 objectives received positive ratings overall with high praise for connecting more visitors to destination experiences through multiple channels (55% rated performance as 'very good' or 'excellent') and delivery enhanced stakeholder programs and supports (46% rated performance as 'very good' or 'excellent').
- The largest area for improvement or focus is increasing shoulder season occupancy and rates with 14% rating performance as 'poor'. It should be noted that the effect of Tourism Golden's efforts were impacted by the Kicking Horse Canyon Project which closed Highway 1 for multiple weeks in the shoulder seasons for the past three years. Although there was an alternative route, it did add nearly 90 minutes to visitors' travel coming from East of Golden.
- Additional areas of improvement include balancing resident values with visitor demand and business needs (11% rated as 'poor') and educating residents of Golden to understand the value of tourism and support the local tourism industry (9% rates as 'poor').

# Tourism Golden Strategic Objective Performance

## Tourism Golden Strategic Objective Performance (% of Stakeholders)



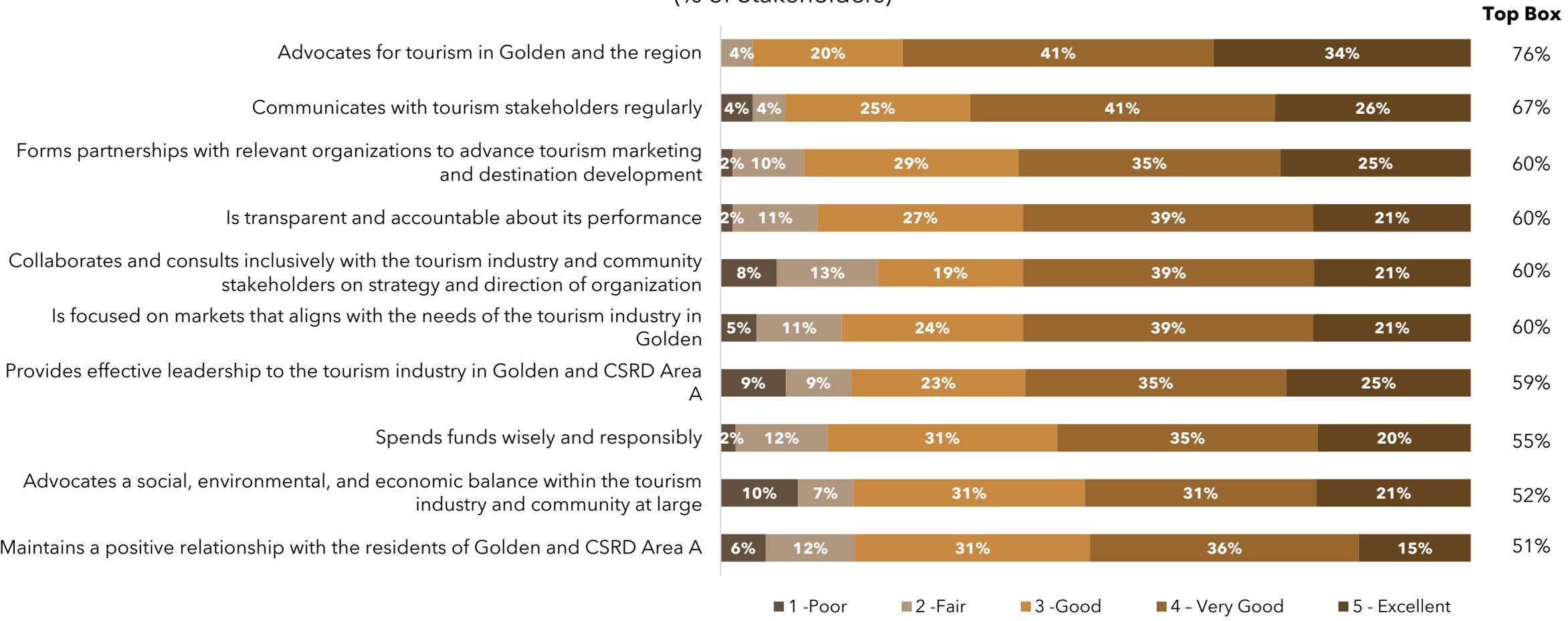
# Tourism Golden Business Performance

Stakeholders were asked to rate TG's performance on ways of conducting business (see next two pages for details).

- Overall, the majority of stakeholders rate Tourism Golden as 'very good' or 'excellent' on all presented business performance measures.
- The top two rated elements are that TG advocates for tourism in Golden and the region (76% rated as 'very good' or 'excellent') and TG communicates with tourism stakeholders regularly (67% rated as 'very good' or 'excellent'). Most elements received approximately 60% 'very good' or 'excellent'.
- The bottom two rated performance elements were that TG maintains a positive relationship with residents of Golden and CSRD Area A (51% rated as 'very good' or 'excellent' with 6% rating as 'poor') and advocates for social, environmental and economic balance within the tourism industry and the community at large (52% rated as 'very good' or 'excellent' with 10% rating as 'poor')

# Tourism Golden Business Performance

## Tourism Golden Strategic Business Performance (% of Stakeholders)

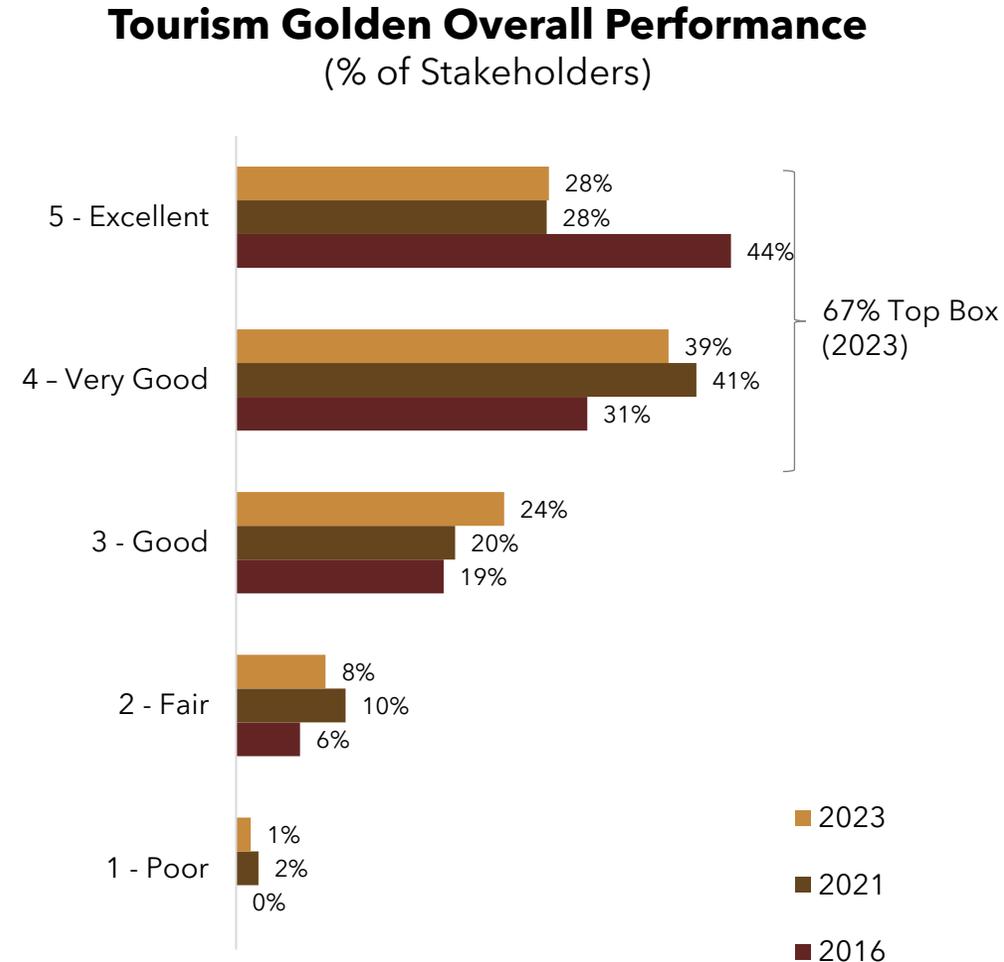


Tourism Golden strives to collaborate and be an inclusive, industry-driven organization. How do you rate Tourism Golden's performance on the following ways of conducting business. n=49-70.

# Tourism Golden Overall Business Performance

Stakeholders were asked to rate the overall performance of TG.

- In 2023, 67% of stakeholders rated TG's overall performance as 'very good' or 'excellent'. This is down 2 percentage points from 2021 (69%).
- It is noteworthy that only 1% rated Tourism Golden's overall performance as 'poor'; down from 2% in 2021,.



# Tourism Golden Overall Business Performance

Stakeholders were asked what TG could do to improve their performance rating.

- 24 stakeholders provided 21 suggestions.
- Comments were summarized into groups about TG's focus, affordable housing, community involvement/support, growth and other (see next two pages for details).

## **Suggestions about Tourism Golden Focus**

*'Better communication with stakeholders, as we seem to miss out on lot of tourism related events'*

*'Continue to develop more engagement between tourism businesses, non-tourism businesses and residents'*

*'Ensure adequate promotion of all activities and companies'*

*'Be aware of all aspects of tourism, from promotion to actual day to day living in a tourism based economy, from current to future.'*

*'Focus on shoulder seasons and simplify the advertising packages to one appose to multiple ads for similar or seasonal magazine issues'*

# Tourism Golden Overall Business Performance

## Comments about Affordable Housing

*'Assess other tourism based communities to understand the difficulties they have run into with successful tourism. IE, Canmore, Whistler, Fernie and Revelstoke and others have run into infrastructure issues relating to staff and local housing and affordable housing as tourism has increased. Most destination communities have run into the same problem, can't afford live there for locals and can afford to find staff housing. It would a shame to have Golden fall into the same trap. We need to plan way in advance for these housing issues as tourism grows. So many places like Canmore and Whistler have low permanent occupancy rates in homes and no place the locals live or buy. Tourism employees are paid low rates and can not afford live or purchase homes in the communities where they work. Need planning to be different.'*

## Comments about Growth

*'I feel strongly, after 20 years dealing with tourists here, we need to find a better balance between tourism and too much tourism. First we require affordable housing for staff. Without staff, doing a good job of dealing with tourists is difficult. It doesn't take long for word to get out. 'Don't go there. The food is bad, the accommodation is bad. It is a bad experience.' Nobody wants that and that is what is happening in places such as Lake Louise and Banff. Over the past few years, the number of visitors (mostly overseas) stay in Golden for one reason only. It is cheaper here and rooms are available here in order for them to go to Banff, Lake Louise, Columbia Icefields. You get the picture. 80% of our guests who stay with us (we are an accommodator) are here for that reason only. They are not here to go mountain biking, riding the gondola to the top of the mountain, fishing, horseback riding, golf, hiking in our area. They are here to go to the parks where there are crowds of other tourists. And it is turning out to be a back experience. We are not here for the weekend warriors. I am only talking summer. The winter takes care of itself and they are here for Kicking Horse Resort and the skiing. We need to be very careful of where we are going. We have an amazing area with so many things to do and see. I may have got off topic but right now it maybe is time for a pause. We have some fabulous restaurants here but they close 2 days a week because they do not have staff. Some have not reopened (Kicking Horse). I think tourism Golden has done a great job to a point. It is time to rethink their goals and where the money is being spent'*

# Tourism Golden Overall Business Performance

## **Comments about Growth, continued**

*'We are understaffed and under housed, adding more tourists that we cant service is a burden we don't need except for the huge corporate giants that are also understaffed and overworked but driven by corporate greed to say more more more'*

*'Slow down, we are getting overwhelmed'*

## **'Other Comments**

*'Work better with the bike club to support our trail maintenance financially'*

*'Some programs could perform better'*

# Tourism Golden Important Business Activities

Stakeholders were asked what the most important business activity TG could do to support the tourism industry in Golden (see next two pages for details).

- The top three mentions were marketing/promotion (23%), support for all new, small, local businesses (17%), and affordable housing (11%).
- There has been a sizable shift in responses from previous years especially with the emergence of affordable housing.

# Tourism Golden Important Business Activities

## Most Important Business Activity to Support Tourism Industry in Golden (% of Stakeholders)



# Tourism Golden Important Business Activities

Top Rated Important Business Activities	2023	2021	2016
Marketing/Promotion	21%	30%	21%
Support for All New, Small, Local Businesses	17%	16%	13%
Affordable housing	11%	0%	0%
Continue Current Work	9%	43%	38%
Collaboration with Stakeholders	9%	11%	18%
Advocate for Tourism in Golden	8%	8%	0%
Encourage/Develop Events (post COVID)	8%	8%	8%
Improve infrastructure to support sustainable/balanced growth	8%	0%	0%
Encourage Responsible/Sustainable/Eco Tourism	6%	11%	3%
Spend Money More Wisely	4%	3%	0%
Modernize/Innovation in Marketing Approach	4%	3%	8%
Signage	4%	0%	3%
Parking	4%	0%	0%
Promote the completion of the TransCanada Kicking Horse Canyon Project	4%	0%	0%
Encourage Transportation/Shuttles	2%	3%	8%
Product Development	2%	0%	3%
Lobby for More Pandemic Support for Businesses	0%	3%	0%
Sharing Economy Policy Development	0%	0%	3%
Travel Trade/Tour Group Work	0%	0%	3%
Travel Media	0%	0%	5%
Other comments	8%	0%	0%

In your opinion, what is the most important thing Tourism Golden could do to support the tourism industry in Golden? n=55. 55 stakeholders provided 53 responses (2023), n=37. 37 stakeholder provided 51 responses (2021). 2016 n = 41. 41 stakeholders provided 51 responses. The percent totals to more than 100% because stakeholders could provide more than one most important business activity.

# Tourism Golden Business Activities

Suggestions on what is the most important thing TG could do to support the tourism industry in Golden .

*'Focus on promoting small businesses and local NFPs, boosting local economy and encouraging folks to shop and buy local'*

*'Getting Golden out there for visitors to come and explore. I have heard some comments from visitors what is there to do in Golden?'*

*'In preparation for the 2024 Season - make sure everyone in Calgary knows that the TransCanada Kicking Horse Canyon Project is done! What a headache that construction was! The 2nd most important thing that Tourism Golden should do is continue to publish their 'Pocket Maps' for hiking, biking, etc.'*

*'Keep an eye on opportunities to capture more travellers coming from other countries. Continue marketing in Alberta towns that have regular travellers coming into our town.'*

*'Keep in touch with the small businesses and help them direct their advertising in the right direction. Keep putting on webinars and courses to help small businesses advertise. Share, like and comment on the small businesses social media channels.'*

*'Direct your strategy towards what is actually sustainable and obtainable levels of tourism that the towns infrastructure, businesses housing and staff levels can meet.'*

*'More affordable housing as the biggest challenge businesses face is staff accommodation.'*

*'Support employees in the sector - advocate for livable wages and housing (supported by the sector, not social services)'*

# Barriers to Growth

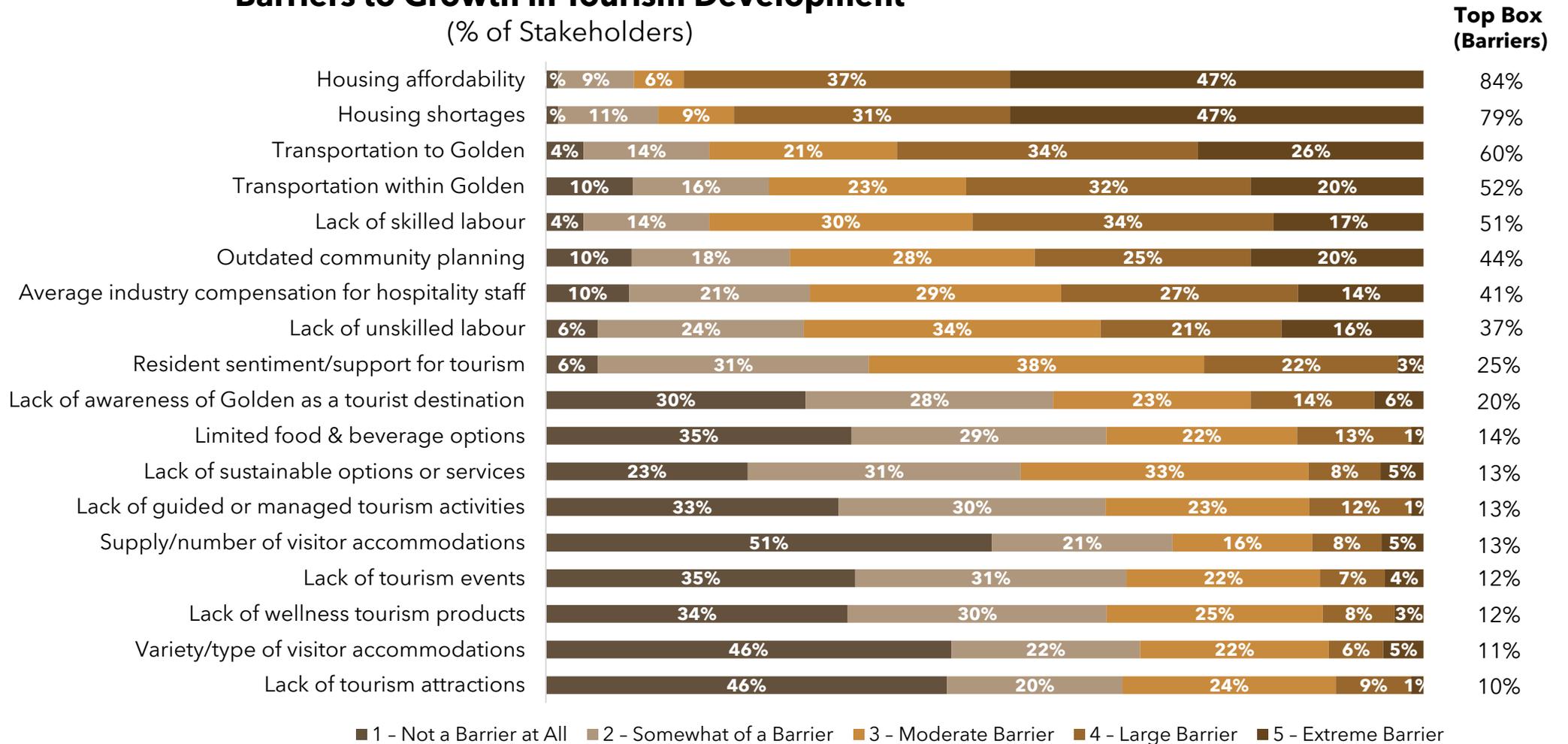
# Barriers to Growth in Tourism Development

Previous years, Stakeholders were asked to provide open end responses to their top three short-term and top three long-term barriers to tourism growth. The responses were then coded and analyzed. Given we had this historical feedback as well as knowledge of the market and industry, the question was modified to rate various elements on the magnitude as a barrier to tourism growth. Stakeholders were also able to provide additional elements if they were so inclined. Given this change, results are not comparable to previous years.

- The largest barrier to tourism growth is housing. In fact, 84% noted that affordable housing was a 'large' or 'extreme' barrier while 79% said the same of housing shortages.
- Transportation is also a challenge to tourism development. Six-in-ten (60%) see transportation to Golden as a 'large' or 'extreme' barrier to growth while 52% gave the same ratings for transportation within Golden.
- Lack of skilled labour rounds out the top five barriers to growth with 51% rating it as a 'large' or 'extreme' barrier to growth. It is noteworthy that several other labour-related elements follow closely.
- Most of the largest barriers are very complex and involve macro-level influences. Not that it is simple, but perhaps slightly more tangible for Tourism Golden, is that 44% view the outdated community planning as a 'large' or 'extreme' barrier to growth. Given the local-level, this may be an area of focus despite not being in the top 5 barriers.

# Barriers to Growth in Tourism Development

## Barriers to Growth in Tourism Development (% of Stakeholders)



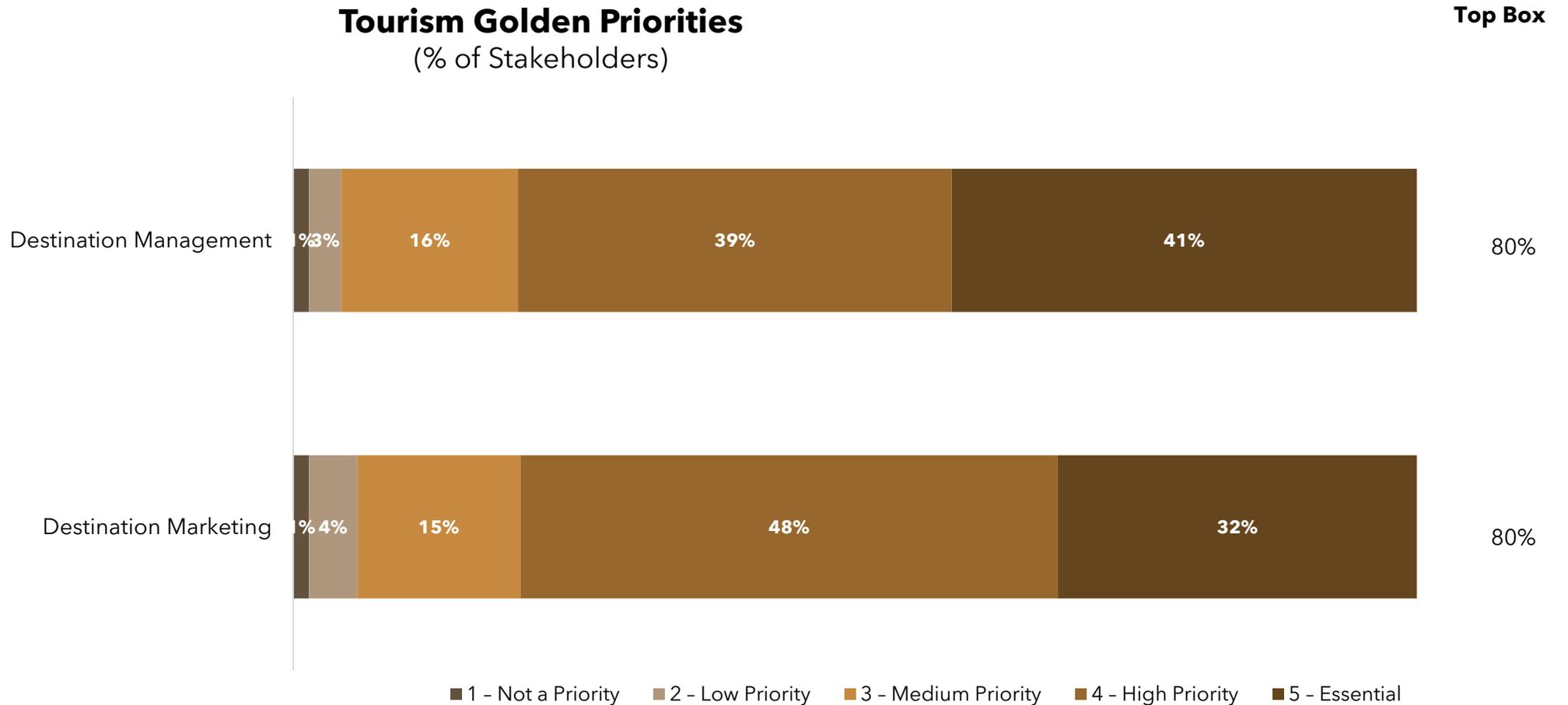
# Priorities Moving Forward

# Tourism Golden Priorities - High-level

Stakeholders were asked how much of a priority TG should place on two main pillars (see next page for details).

- Overall, both Destination Marketing and Destination Management are viewed as high priorities. In fact, both have 80% of stakeholders rating these as 'high priority' or 'essential'.
- Interestingly, Destination Management has a higher proportion of stakeholders noting it as 'essential' (41%) compared to Destination Marketing (32%).

# Tourism Golden Priorities - High-level



# Tourism Golden Priorities - Tactics

Stakeholders were asked about priorities for each strategic pillar tactic (see the next four pages for detail).

- The top five priorities overall are to support the sustainable and responsible growth of visitor volumes and tourism revenues (84%), encourage economic sustainability of tourism in Golden (81%), build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met (80%), measure the value of visitors' economic impact (76%), target visitor that are respectful of environment and people (74%) and provide visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden) (74%).
- The following tables provide the top priorities by category as well as the full ratings.

# Level of Priority - Tactics

	Tactics	Top Box
<b>Visitors</b>	Targeting visitor that are respectful of environment and people	74%
	Visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden)	74%
	Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	73%
<b>Economic Impact</b>	Encouraging economic sustainability of tourism in Golden	81%
	Measuring the value of visitors' economic impact	76%
	Communication about the value of the tourism industry to the broader Golden community	63%
<b>Development</b>	Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	65%
	Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding, responsible and inclusive tourism experiences)	70%
<b>Development Sustainability</b>	Support the sustainable and responsible growth of visitor volumes and tourism revenues	84%
	Encouraging environmental sustainability of tourism in Golden	73%
	Advocate for Golden to be a physically accessible destination	63%
	Advocate for Golden to be a diverse and inclusive destination	63%
<b>Community &amp; Government Relations</b>	Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	80%
	Supporting community organizations on labour shortages and affordable housing issues	73%
	Build resident support for and engagement with tourism in Golden	67%
<b>Research</b>	Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)	65%

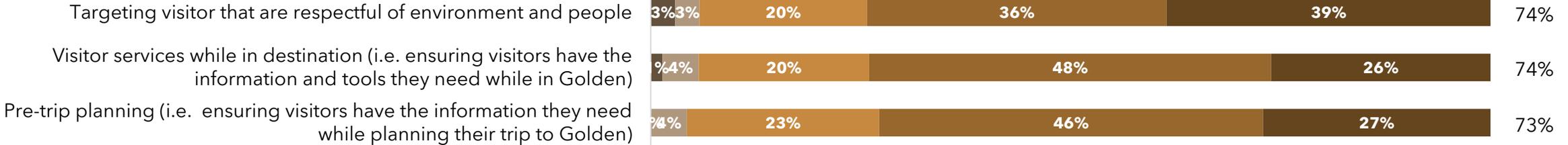
As noted, each of the strategic pillar is comprised of various tactics. Please share your opinion of what level of priority each of the following tactics should have? n = 68 - 70.

# Level of Priority - Tactics

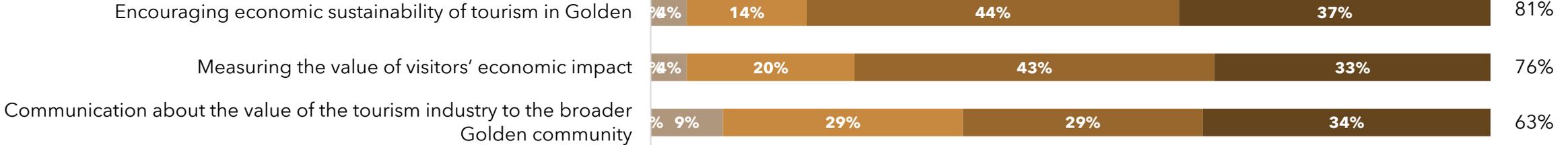
**Tourism Golden Tactics Priorities**  
(% of Stakeholders)

**Top Box**

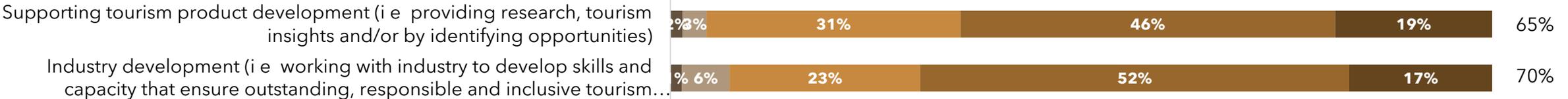
**Visitors**



**Economic Impact**



**Development**



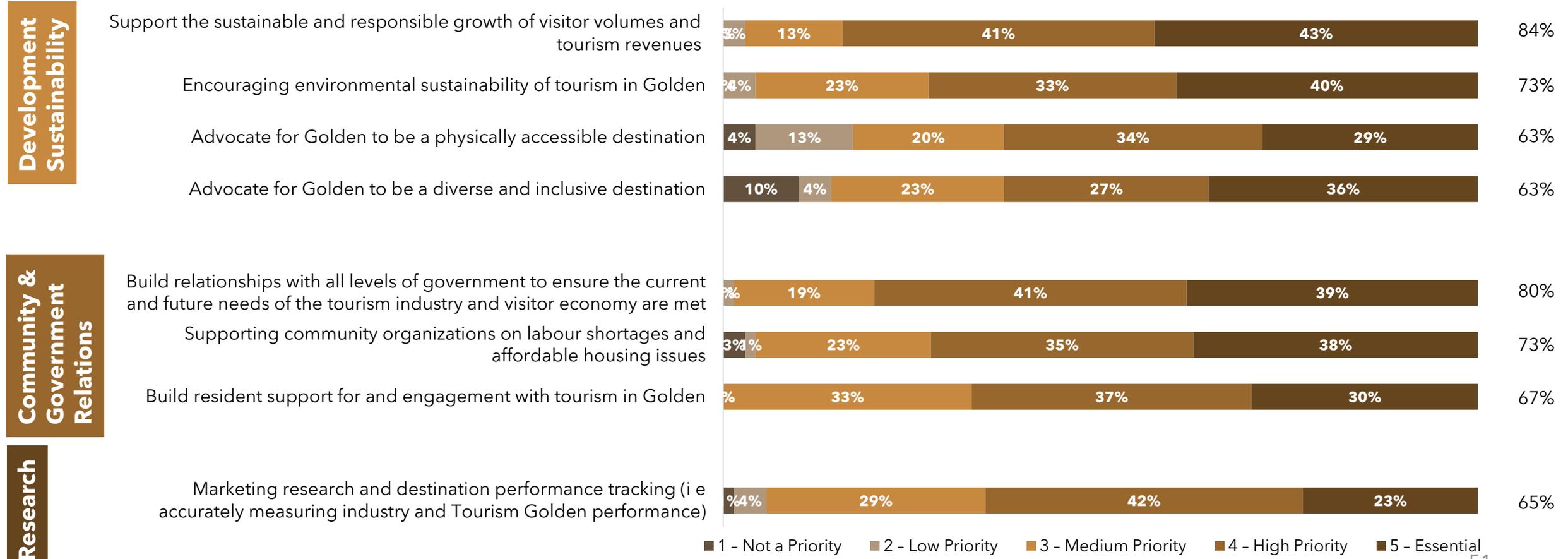
■ 1 - Not a Priority   ■ 2 - Low Priority   ■ 3 - Medium Priority   ■ 4 - High Priority   ■ 5 - Essential

As noted, each of the strategic pillar is comprised of various tactics. Please share your opinion of what level of priority each of the following tactics should have? n = 68 - 70.

# Level of Priority - Tactics

**Tourism Golden Tactics Priorities**  
(% of Stakeholders)

**Top Box**



■ 1 - Not a Priority ■ 2 - Low Priority ■ 3 - Medium Priority ■ 4 - High Priority ■ 5 - Essential

As noted, each of the strategic pillar is comprised of various tactics. Please share your opinion of what level of priority each of the following tactics should have? n = 68 - 70.

# Level of Priority - Tactics

	Tactics	Top Box (2023)	2021	2016
<b>Visitors</b>	Targeting visitor that are respectful of environment and people	74%	NA	NA
	Visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden)	74%	80%	NA
	Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	73%	71%	NA
<b>Economic Impact</b>	Encouraging economic sustainability of tourism in Golden	81%	NA	NA
	Measuring the value of visitors' economic impact	76%	NA	NA
	Communication about the value of the tourism industry to the broader Golden community	63%	71%	58%
<b>Development</b>	Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	65%	73%	66%
	Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding, responsible and inclusive tourism experiences)	70%	73%	73%
<b>Development Sustainability</b>	Support the sustainable and responsible growth of visitor volumes and tourism revenues	84%	NA	NA
	Encouraging environmental sustainability of tourism in Golden	73%	NA	NA
	Advocate for Golden to be a physically accessible destination	63%	NA	NA
	Advocate for Golden to be a diverse and inclusive destination	63%	NA	NA
<b>Community &amp; Government Relations</b>	Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	80%	NA	NA
	Supporting community organizations on labour shortages and affordable housing issues	73%	69%	NA
	Build resident support for and engagement with tourism in Golden	67%	NA	NA
<b>Research</b>	Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)	65%	62%	76%

# Municipal and Regional District Tax (MRDT) Funds

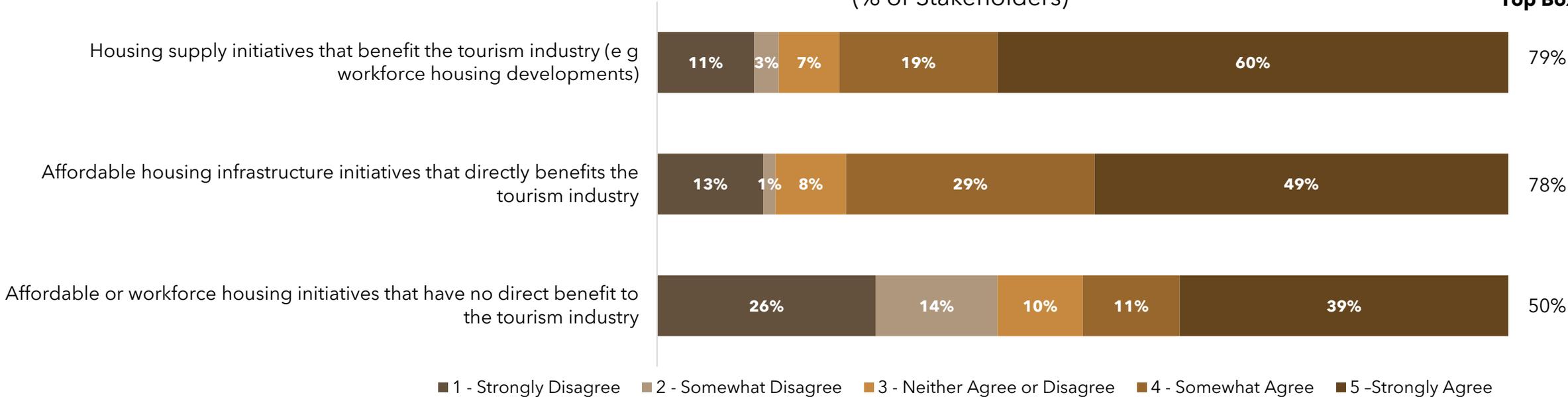
Stakeholders were asked about their support using MRDT funds for affordable housing.

- The question was modified in 2023 to better qualify types of affordable housing initiatives. It appears that this definition, along with situational factors, has shifted perceptions of stakeholders to support initiatives that benefit the tourism industry. Specifically, 79% agree that MRDT funds be used for ‘housing supply initiatives that benefit the tourism industry’ and 78% agree with ‘affordable housing infrastructure initiatives that directly benefit the tourism industry’. Although 49% still disagree, half (50%) of stakeholders agree with using MRDT funds for ‘affordable or workforce housing initiatives that have no direct benefit to the tourism industry’.

## Agreement with Using MRDT Funds for Affordable Housing

(% of Stakeholders)

Top Box



# Sustainability Initiatives

Stakeholders were asked to select their top five priorities of 13 sustainability initiatives (see next page for details).

- More than half of stakeholders prioritized increasing shoulder season visitation and attracting and retaining tourism labour (58% and 54%, respectively).
- Other top five responses were affordable housing initiatives (47%), enhancing visitor information and education on responsible and respectful behaviour (43%) and enhancing visitor awareness of safe and responsible backcountry recreation (39%).
- Stakeholders mentioned five other sustainability initiatives they would like to see implemented in Golden.

# Sustainability Initiatives

'Don't get caught up in the Woké traps. Stay the course on visitors. People coming to Golden have the means and will expect us to provide responsible tourism products. We are an industry based town along with tourism. Both keep our community vibrant. That should be the message in education to our visitors and locals alike if you choose to take a stand on a vision. Thanks for asking. Keep up the good work!'

'Golden needs to implement way more large volume garbage and recycling facilities that are not locked. As a downtown business I am sick of having to take my garbage and recycling home every night in the summer because tourists have thrown their garbage and recycling over the barrier wall into our paid - small enclosure. Communities like Banff have large, 24 hour a day facilities right downtown to facilitate their large numbers. Our community has grown with tourists but there is no where to dispose of waste. It's bizarre that we lock up our only downtown depot - like we don't trust ppl to recycle after hours. Tourists constantly ask where there are garbages /recycling bins.'

'No'

'Participating in the funding and build of a bike path all the way to Radium and possibly in all directions leaving Golden.'

'Regional transportation connectors'

'Understand what we have as a current inventory of available tourism opportunities, meaning how many people can we support during peak seasons in all aspects, so we have a metric to base our infrastructure on and what we need to do if we increase that number of things visitors can do. How many tourism based experiences and people can Golden and area do at one time/day in high season. Then same for low season.'

# Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 8)	Stakeholder Rating	Lower Rated Sustainability Initiatives (Bottom 5)	Stakeholder Rating
1. Increasing shoulder season visitation	58%	9. Increasing visitor yield (i.e. expenditures per visitor)	32%
2. Attracting and retaining tourism labour	54%	10. Understanding and tracking Golden resident sentiment towards tourism	30%
3. Affordable housing initiatives	47%	11. Gathering data to inform the tracking and management of visitor volume, value and behaviour	28%
4. Enhancing visitor information and education on responsible and respectful behaviour (e.g., a visitor code of conduct when visiting local parks, trails, campgrounds, and other outdoor recreation and community spaces)	43%	12. Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)	16%
5. Enhancing visitor awareness of safe and responsible backcountry recreation	39%	13. Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)	11%
6. Encouraging new tourism product development that is environmentally sustainable	35%		
7. Targeting 'responsible tourists' in marketing initiatives	32%		
8. Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction	32%		

# Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 8)	2023 Rating	2021 Rating
1. Increasing shoulder season visitation	58%	54%
2. Attracting and retaining tourism labour	54%	33%
3. Affordable housing initiatives	47%	26%
4. Enhancing visitor information and education on responsible and respectful behaviour (e.g., a visitor code of conduct when visiting local parks, trails, campgrounds, and other outdoor recreation and community spaces)	43%	54%*
5. Enhancing visitor awareness of safe and responsible backcountry recreation	39%	22%*
6. Encouraging new tourism product development that is environmentally sustainable	35%	28%
7. Targeting 'responsible tourists' in marketing initiatives	32%	33%
8. Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction	32%	20%

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=74. 74 stakeholders provided 340 responses (2023), n=46. 46 stakeholders provided 208 responses (2021). The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

\* Note that the wording was slightly different in 2021.

# Sustainability Initiatives

Lower Rated Sustainability Initiatives (Bottom 5)	2023 Rating	2021 Rating
9. Increasing visitor yield (i.e. expenditures per visitor)	32%	26%
10. Understanding and tracking Golden resident sentiment towards tourism	30%	NA
11. Gathering data to inform the tracking and management of visitor volume, value and behaviour	28%	41%*
12. Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)	16%	22%
13. Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)	11%	13%

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=74. 74 stakeholders provided 340 responses (2023), n=46. 46 stakeholders provided 208 responses (2021). The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

\* Note that the wording was slightly different in 2021.

# Other Comments

Stakeholders were asked if they had any other comments about TG or tourism in Golden (see next page for details).

- 18 stakeholders had relevant comments.
- 44% (8 responses) of stakeholders responded with 'keep up the good work' or 'thank you'.
- 11% (2 responses) of stakeholders suggested improving road conditions, maps, signage.
- 11% (2 responses) of stakeholders commented on the need to build staff housing.
- 6% (1 response) of stakeholders commented on the need of more downtown accommodations.
- 6% (1 response) of stakeholders suggested encouraging KHMR to re-invest in the ski-hill.
- 6% (1 response) of stakeholders mentioned that TG slowing down, locals feeling overwhelmed with growth.
- 6% (1 response) of stakeholders commented on the need for transparency in where tax money is spent.
- 6% (1 response) of stakeholders suggested improving the app.
- 6% (1 response) of stakeholders suggested increasing minimum wage with no additional taxation adjustments.
- 6% (1 response) of stakeholders commented on getting rid of the vacation planner book and the need for better marketing overseas.

# Other Comments

'Building staff housing at Kicking Horse Mountain Resort would ease the strain on in-town rentals'

'For places that are promoted by Tourism Golden like Gorman Lake, Thompson Falls, Wapta Falls, etc.. The road to Gorman is very rough and gets worse every year. How can this be addressed? Thompson Falls has no signage, parking or outhouse Wapta Falls. Google Maps sends people down the Beaverfoot FSR. Getting lost is a bad experience.'

'For small business, increased minimum wage with no additional taxation adjustments at a provincial level coupled with increase in baseline costs really does raise a red flag. I am fully in support of notional living wage, but it is essentially impossible for a small business to survive let alone grow or thrive. More tourism will not help this. What would help is taxation based incentives, specifically for tourism heavy towns like ours that rely on lower wage employees. If we could pay a living wage knowing that it wouldn't crush our business, we could contemplate growth and expansion and a happy healthier town. This would take some fundamental policy level shifts at a senior government level. There is a role to play in Tourism Golden helping tell this kind of story and advocating for a different ending that is not all about large corporate chain stores/franchises being all that predominates down the road.'

'Get rid of the vacation planner book. Hiking and biking maps are great. Other than those, no need for the rest. I find in the summer the number of our guests who have no idea there is a gondola at Kicking Horse, or a grizzly bear refuge. There needs to be a better job marketing to overseas and US visitors and they are the tourists who spend the most money. A better job with the big wholesalers. Once they are here, it is usually too late as their itinerary is already planned. Surprisingly the sky bridge is more well known. Maybe get on board with Brewster in Banff and work more closely with them. You couldn't go wrong.'

'I think a lot of the negative feedback around tourism is because of the housing and the belief that tax dollars are going into Tourism related infrastructure. I think it would bode well if Tourism Golden and the Town of Golden make it clear it does not and the clear benefits we as residents also reap when tourism infrastructure is attained and the differences in core assets where property taxes go to support. I know both the Town and Tourism Golden has tried to relay this information. However we need to work differently in getting this message across'

# Other Comments – Cont'd

'Improve the app'

'It is great to see Golden out in the world. Seeing an ad pop up in a ski magazine or bike magazine from another part of North America is really cool'

'More downtown accommodations, too separated along the highway strip and downtown. RCR should build staff housing up at the ski resort. More things to do up at the ski resort in the summer rather than just extreme downhill biking'

'Need to encourage KHMR to up their game and re-invest in the ski hill. Revelstoke is a good example. Kicking Horse is currently bad value for money and people will go elsewhere. A gondola from the Skybridge into town would be a great asset'

'Slow down, we don't want to turn Golden into another Canmore, we are already getting overwhelmed'

'The town of Golden did nothing to preserve parking for the ice climbs in the canyon. Instead it turned a blind eye. This was lazy and irresponsible'

# APPENDIX - Questionnaire



## Tourism Golden's 2023 Stakeholder Survey

### Section 1 – Tourism in Golden

First, we have a few questions about tourism and your business/Organization.

#### How important is the Tourism industry to the following:

- Your Business/Organization
- Golden's Economy
- British Columbia's Economy

#### ANSWER OPTIONS:

- Not Important at All
- Not Very Important
- Neither Important Nor Unimportant
- Important
- Very Important
- Don't Know/Not Sure

#### Please rate your level of agreement with the following statements:

- As a business, I/we believe the current amount of tourism development in Golden is adequate.
- As a business, I/we support responsible tourism growth.
- As a business, our staff have enough knowledge to provide tourist with information on attractions, events and other tourist opportunities happening in the area.

#### ANSWER OPTIONS:

- Strongly Disagree
- Somewhat Disagree
- Neither Disagree Nor Agree
- Somewhat Agree
- Strongly Agree
- Don't Know/Not Sure

Do you believe that the current level of tourism development in Golden is too much, too little or just right?

Too Much

Just Right  
Too Little  
Don't Know

Do you believe the speed of tourism development in Golden is too fast, too slow or just right?

Too Fast  
Just Right  
Too Slow  
Don't Know

Would you like visitor volume in Golden to increase, decrease or stay the same in the next five years?

Increase  
Stay the Same  
Decrease  
Don't Know





visitors to destination experiences through multiple channels						
Educate visitors to experience a safe and sustainable vacation	☺	☺	☺	☺	☺	☺
Deliver enhanced stakeholder programs and supports	☺	☺	☺	☺	☺	☺
Residents of Golden understand the value of tourism and support the local tourism industry	☺	☺	☺	☺	☺	☺
Balance resident values with visitor demand and business needs	☺	☺	☺	☺	☺	☺

**Tourism Golden strives to collaborate and be an inclusive, industry-driven organization. How do you rate Tourism Golden's performance on the following ways of conducting business?**

*Please rate each on a scale where 1 = Poor and 5 = Excellent.\**

	1 - Poor	2 - Fair	3 - Good	4 - Very Good	5 - Excellent	Don't Know
Communicates with tourism stakeholders regularly	☺	☺	☺	☺	☺	☺
Advocates for tourism in Golden and the region	☺	☺	☺	☺	☺	☺
Forms partnerships with relevant organizations to advance tourism marketing and destination development	☺	☺	☺	☺	☺	☺
Is transparent and accountable about its performance	☺	☺	☺	☺	☺	☺
Spends funds wisely and responsibly	☺	☺	☺	☺	☺	☺
Collaborates and consults inclusively with the tourism industry and community stakeholders on strategy and direction of organization	☺	☺	☺	☺	☺	☺
Is focused on markets that aligns with the needs of the	☺	☺	☺	☺	☺	☺



Housing shortages	☺	☺	☺	☺	☺	☺
Housing affordability	☺	☺	☺	☺	☺	☺
Transportation to Golden	☺	☺	☺	☺	☺	☺
Transportation within Golden	☺	☺	☺	☺	☺	☺
Lack of awareness of Golden as a tourist destination	☺	☺	☺	☺	☺	☺
Lack of tourism attractions	☺	☺	☺	☺	☺	☺
Lack of guided or managed tourism activities	☺	☺	☺	☺	☺	☺
Lack of tourism events	☺	☺	☺	☺	☺	☺
Supply/number of visitor accommodations	☺	☺	☺	☺	☺	☺
Variety/type of visitor accommodations	☺	☺	☺	☺	☺	☺
Limited food & beverage options	☺	☺	☺	☺	☺	☺
Lack of wellness tourism products	☺	☺	☺	☺	☺	☺
Lack of sustainable options or services	☺	☺	☺	☺	☺	☺
Outdated community planning	☺	☺	☺	☺	☺	☺

Resident sentiment/support for tourism	☺	☺	☺	☺	☺	☺
Average industry compensation for hospitality staff	☺	☺	☺	☺	☺	☺
Other, Please specify: _____	☺	☺	☺	☺	☺	☺
Other, Please specify: _____	☺	☺	☺	☺	☺	☺
Other, Please specify: _____	☺	☺	☺	☺	☺	☺



inclusive tourism experiences)						
<b>Development - Sustainability</b>						
Support the sustainable and responsible growth of visitor volumes and tourism revenues.	G	G	G	G	G	G
Encouraging environmental sustainability of tourism in Golden	G	G	G	G	G	G
Advocate for Golden to be a physically accessible destination	G	G	G	G	G	G
Advocate for Golden to be a diverse and inclusive destination	G	G	G	G	G	G
<b>Community &amp; Government Relations</b>						
Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	G	G	G	G	G	G
Build resident support for and engagement with tourism in Golden	G	G	G	G	G	G
Supporting community organizations on labour shortages and affordable housing issues	G	G	G	G	G	G

<b>Research</b>						
Marketing research and destination performance tracking (i.e. accurately measuring industry and tourism Golden performance)	G	G	G	G	G	G

**How much do you agree with the following statement about the use of Golden's MRDT funds for affordable housing?**

**Please rate each of the following program areas on a 1 -5 scale, where 1 = Strongly Disagree and 5 = Strongly Agree. \***

I support the use of Golden MRDT revenues for...	1 - Strongly Disagree	2 - Somewhat Disagree	3 - Neither Agree or Disagree	4 - Somewhat Agree	5 - Strongly Agree	Don't Know
Affordable or workforce housing initiatives that have no direct benefit to the tourism industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable housing infrastructure initiatives that directly benefits the tourism industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing supply initiatives that benefit the tourism industry (e.g. workforce housing developments)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future?\***

- Understanding and tracking Golden resident sentiment towards tourism

- Enhancing visitor information and education on responsible and respectful behaviour (e.g., a visitor code of conduct when visiting local parks, trails, campgrounds, and other outdoor recreation and community spaces)
- Enhancing visitor awareness of safe and responsible backcountry recreation
- Targeting 'responsible tourists' in marketing initiatives
- Gathering data to inform the tracking and management of visitor volume, value and behaviour.
- Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction
- Encouraging new tourism product development that is environmentally sustainable
- Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)
- Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)
- Increasing shoulder season visitation
- Increasing visitor yield (i.e. expenditures per visitor)
- Attracting and retaining tourism labour
- Affordable housing initiatives
- None

**Are there other sustainable tourism initiatives not listed above that you would like to see implemented in Golden?**

*If so, please fill in your response.*

#### Section 6 - Other Comments

That completes the survey; however, we would be happy to hear any other comments that you would like to share with Tourism Golden.

**Are there any other comments you would like to share about Tourism Golden or tourism in Golden?**



**Thank You for taking the time out of your busy schedule. Your feedback is very important and Tourism Golden appreciates your sharing.**



**For more information contact:**

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