



Tourism Golden

2024 Stakeholder Survey Report

January 2025



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 2024, TG initiated its fourth stakeholder survey to understand Stakeholder perceptions. The previous stakeholder surveys were conducted in 2016, 2021, and 2023. 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 39% response rate, down from 41% in 2023. In 2024, community partners (81%) had the highest response rates followed by accommodation businesses (40%), food and beverage, retail or tourism services (35%), and activities/attractions (22%).

RESULTS

GENERAL PERCEPTIONS OF INDUSTRY

- Overwhelmingly, stakeholders understand the importance of tourism to their business/organization and to both Golden's and BC's Economies.
- Nearly all stakeholders are supportive of responsible tourism growth in Golden (99% agree) and are confident their staff have the knowledge to provide tourist information to visitors.
- The majority of stakeholder (60%) feel that tourism development is adequate but the pace of development has mixed reviews as under half (46%) think it is 'just right' but 29% think it is 'too slow'. That said, most stakeholders would like to see visitor growth in the next 5 years.

Executive Summary

TOURISM GOLDEN AWARENESS & PERFORMANCE

- Familiarity with Tourism Golden has slightly increased with the majority (70%) of stakeholders being familiar with TG's programs and services.
- Stakeholders are most aware of Tourism Golden's annual publications (84%). Golden's destination app (72%), Tourism Golden's support for professional/semi-professional events (71%), local and industry event support (70%), paid print advertising (69%), and content and asset creation (68%) 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, 64% think that Tourism Golden has done a 'very good' or 'excellent' job at increasing overall value of the tourism economy. However, there are several areas for improvement, most notably is increasing shoulder season revenue with 8% rating performance as 'poor' and 31% rating it as 'fair'.
- From an operating perspective, the majority of stakeholders rate Tourism Golden as 'very good' or 'excellent' on all presented business performance measures. The top three rated elements are that TG advocates for tourism in Golden and the region (74% rated as 'very good' or 'excellent'), TG forms partnerships to advance marketing and destination development (67%), and TG provides effective leadership to the industry (66%).
- Tourism Golden's overall performance was strong and consistent with previous results. In fact, 73% of stakeholders rated TG's overall performance as 'very good' or 'excellent'. This is up from 68% last year.

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 (39% compared to 34% 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%), encourage economic sustainability of tourism in Golden (84%), and target visitors that are respectful of both the environment and people (84%). Building relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met (78%), encouraging environmental sustainability of tourism in Golden (78%), and providing visitor services while in destination (75%) were also high priorities.
- The largest barrier to tourism growth is housing – both affordability (75% note it is a ‘large’ or ‘extreme barrier’) and shortages (67%). For Golden, community planning (47%) and transportation to (45%) and within (42%) Golden are also large barriers to growth.

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 2024, TG initiated its fourth stakeholder survey to understand Stakeholder perceptions. The previous stakeholder surveys were conducted in 2016, 2021, and 2023. Results obtained in 2024 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 2023 findings.
- 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.
- Verbatim comments are available under a separate cover.

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.
- Last year, ACG worked with TG to overhaul the content for the stakeholder survey and used the Destination BC's MRDT Stakeholder Survey Guidebook¹ was used to assist in questionnaire development. In 2024, minor changes were made therefore most questions are comparable with 2023. A truncated survey was available to government and Kootenay Rockies Tourism given the unique nature of their relationship with Tourism Golden and its activities.
- TG provided ACG with an email distribution list of 219 emailable stakeholders and 17 of those were removed because they were duplicates, closed or the email address was undeliverable. This resulted in 202 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 October 30, 2024 and November 20, 2024.
- 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.

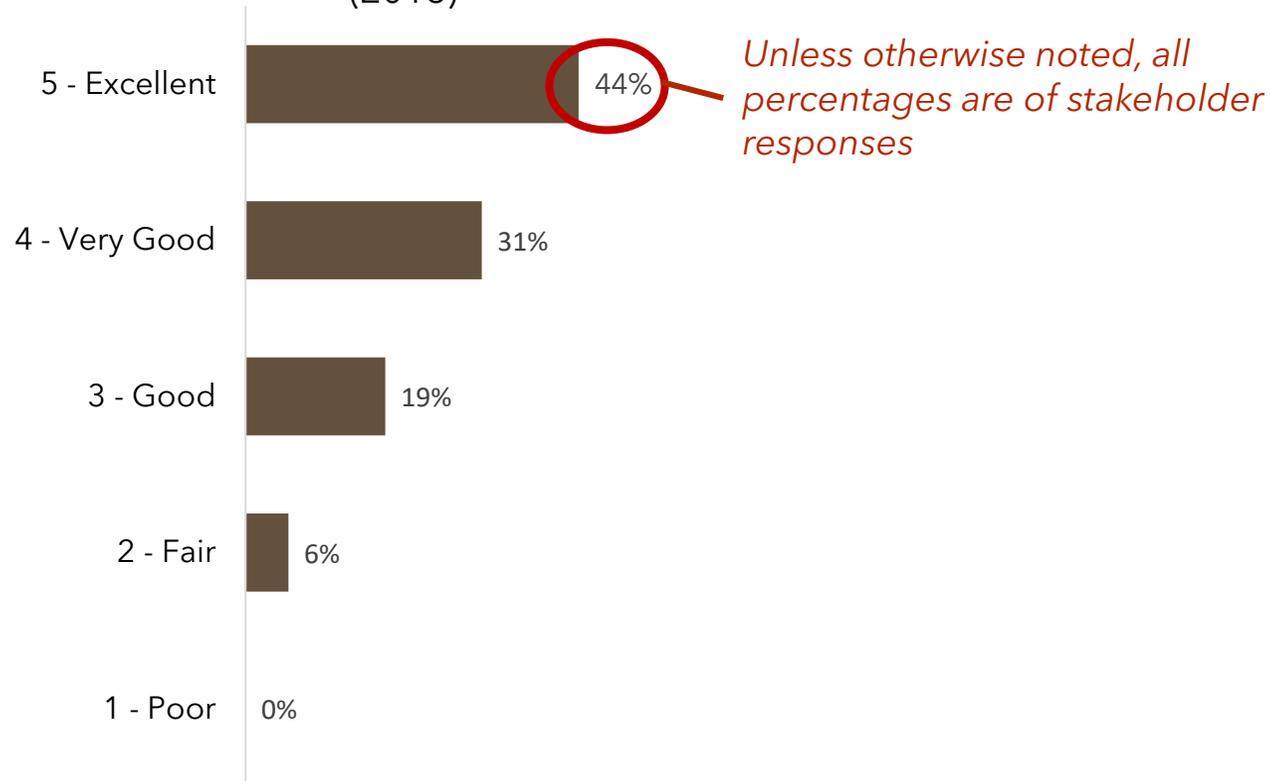


- Where possible, comparisons to 2021 and 2023 were made.
-Differences were noted if 'top box' responses were more than 5% different.

Methodology - Analysis

TIPS FOR READING

Tourism Golden Overall Performance (2016)



Open-Ended Responses

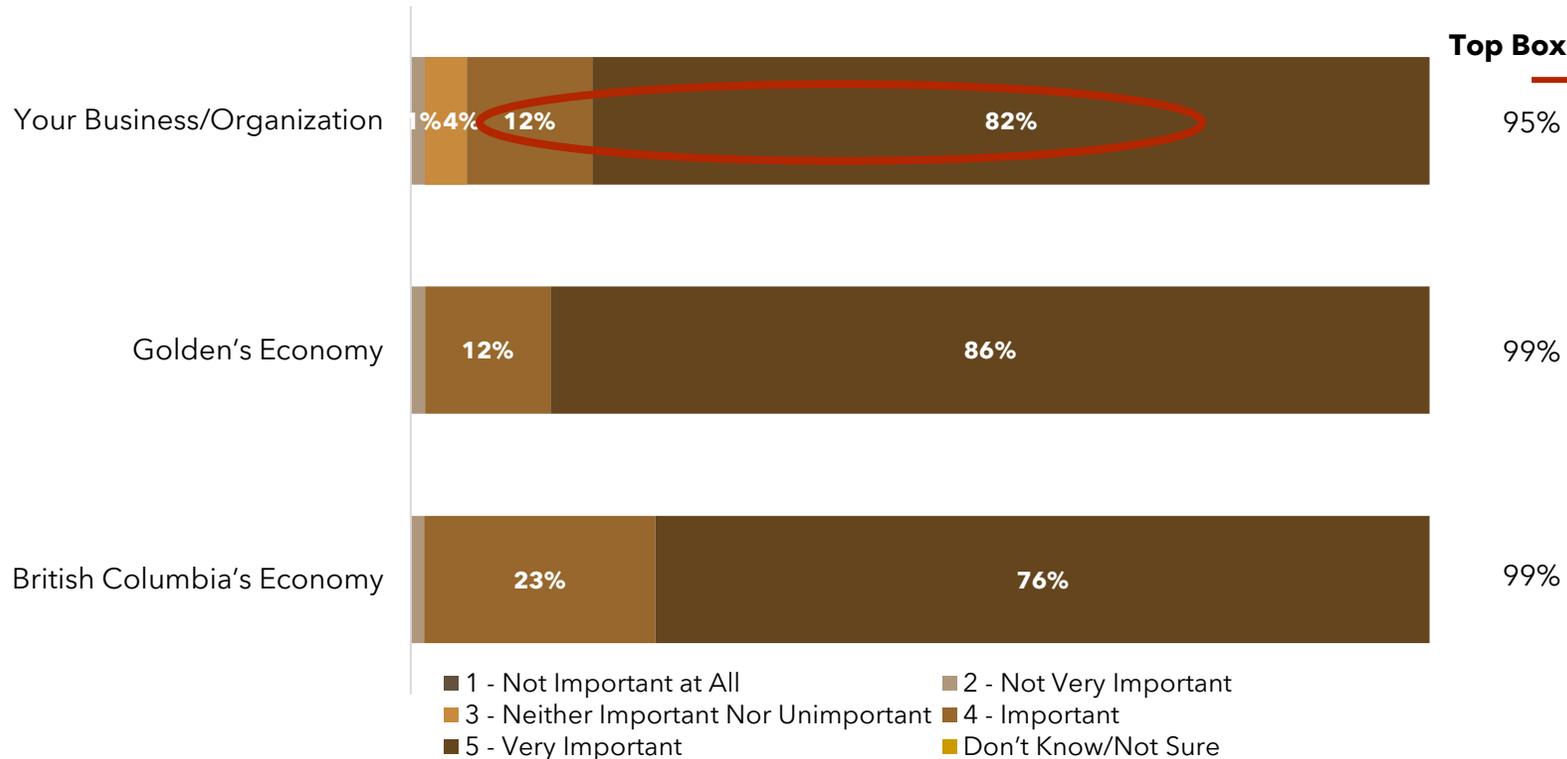
Several questions were asked with open-ended responses. Verbatim responses are summarized in *MVBoli* font. For the most part, they have not been edited and are meant to provide more depth to understanding the stakeholder perspective.

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 95%. The top box is also listed to the right of the chart.**

Methodology - Survey Responses

- In total, 89 people clicked on the survey link via that email or open-link distribution. When duplicates and responses with no data were removed, there were 79 responses. This equals a 39% response rate. Down slightly from 41% in 2023.
- 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	85 (42%)	34 (43%)	40%
Activities and Attractions	41 (20%)	9 (11%)	22%
Food and Beverage, Retail and Tourism Services	55 (27%)	19 (24%)	35%
Community Partner	21 (10%)	17 (22%)	81%
TOTAL	202	79	39%

RESULTS

General Perceptions About the Tourism Industry

Importance of the Tourism Industry

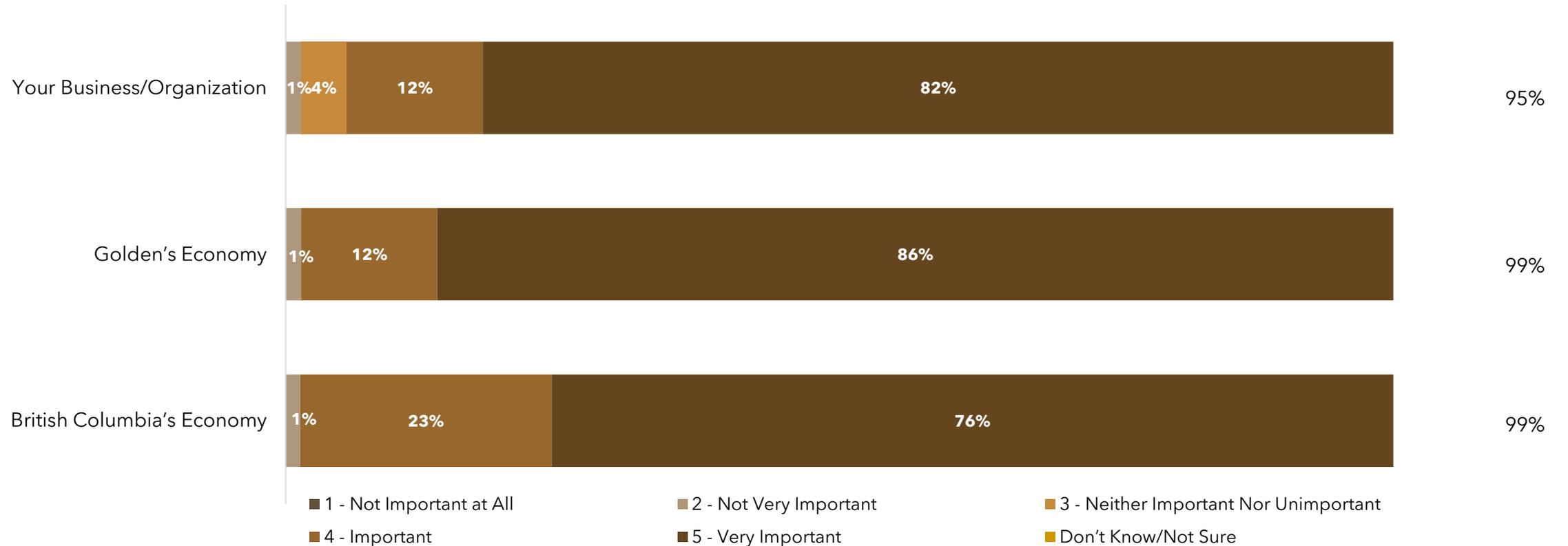
Stakeholders were asked how important is the Tourism industry on three aspects.

- Overall, nearly all stakeholders view tourism as 'important' or 'very important' for their business/organization (95%), Golden's economy (99%), and British Columbia's economy (99%).
- 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 76% 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.

- Nearly all stakeholders say that as a business/organization they support responsible tourism growth (99% 'somewhat' or 'strongly' agree).
- The majority agree that their staff has enough knowledge to provide tourists with information on attractions, events and other tourist opportunities happening in the area (83% 'somewhat' or 'strongly' agree).
- Generally, stakeholders agree with the amount of tourism development in Golden being adequate with 60% 'somewhat' or 'strongly' agreeing while 9% 'somewhat disagree' and 5% 'strongly disagree' with this statement.

Agreement with Tourism Golden

Agreement with Tourism Golden
(% of Stakeholders)

Top Box

As a business, I/we believe the current amount of tourism development in Golden is adequate



60%

As a business, I/we support responsible tourism growth



99%

As a business, our staff have enough knowledge to provide tourist with information on attractions, events and other tourist opportunities happening in the area



83%

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

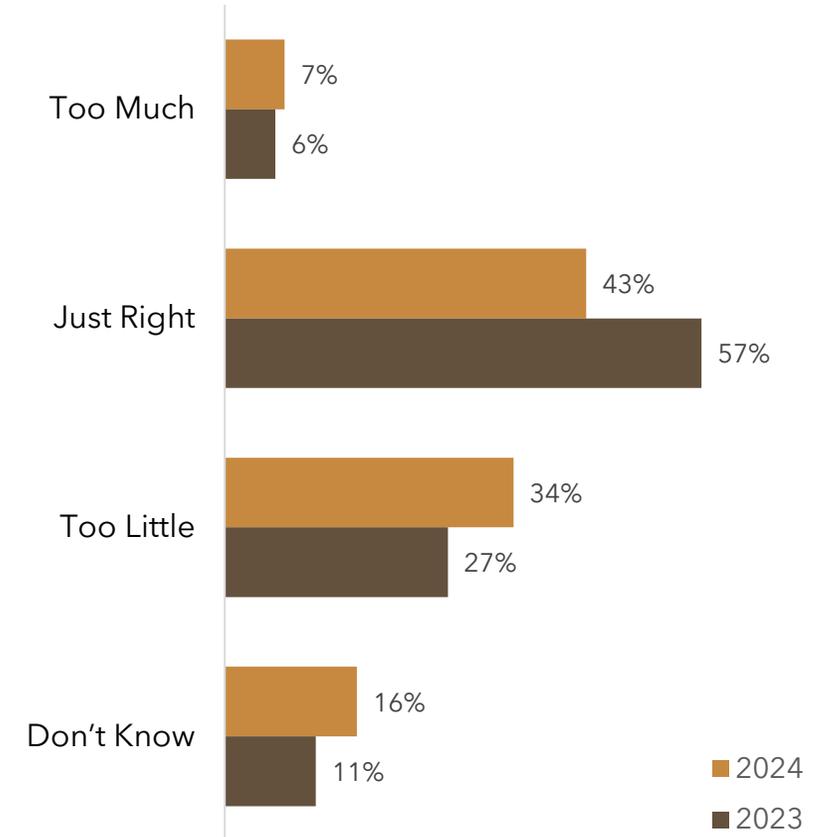
Please rate your level of agreement with the following statements:? Scale: 1 = Strongly Disagree, 5 = Strongly Agree, n=66-67.

Current Level of Tourism Development in Golden

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

- Less than half of stakeholders are satisfied with the current level of tourism development in Golden. In fact, only 43% say it is 'just right' while 34% feel that there is 'too little' and, in contrast, 7% think there is 'too much'.
- The satisfaction level with the current level of tourism is notably lower compared to last year (43% vs. 57% in 2023) and more stakeholders feel that there is 'too little' compared to last year (34% vs. 27% in 2023).

Current Level of Tourism Development
(% of Stakeholders)

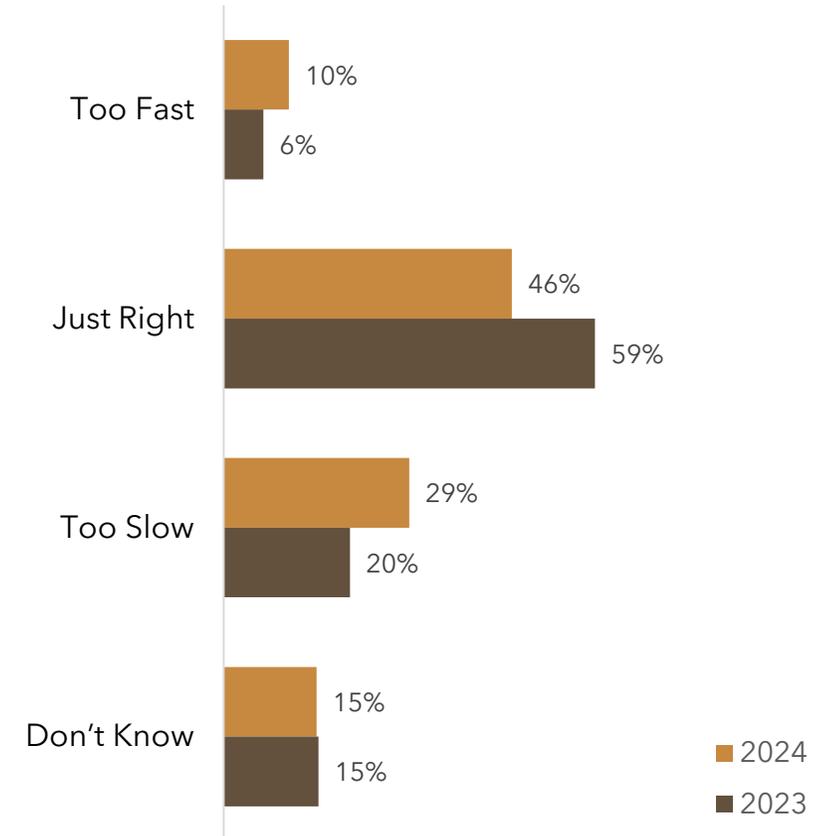


Speed of Tourism Development in Golden

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

- Nearly one-half (46%) of stakeholder are happy with the speed of tourism development and feel that it is 'just right'.
- That said, three-in-ten (29%) view it as too slow and 10% say development in Golden is too fast.
- In 2024, stakeholders are less likely to believe that the speed of tourism development is 'just right'. In fact, it decreased 13 percentage points from 59% in 2023. In contrast, more believe that it is developing 'too slow' (29% vs. 20% in 2023).

Speed of Tourism Development
(% of Stakeholders)

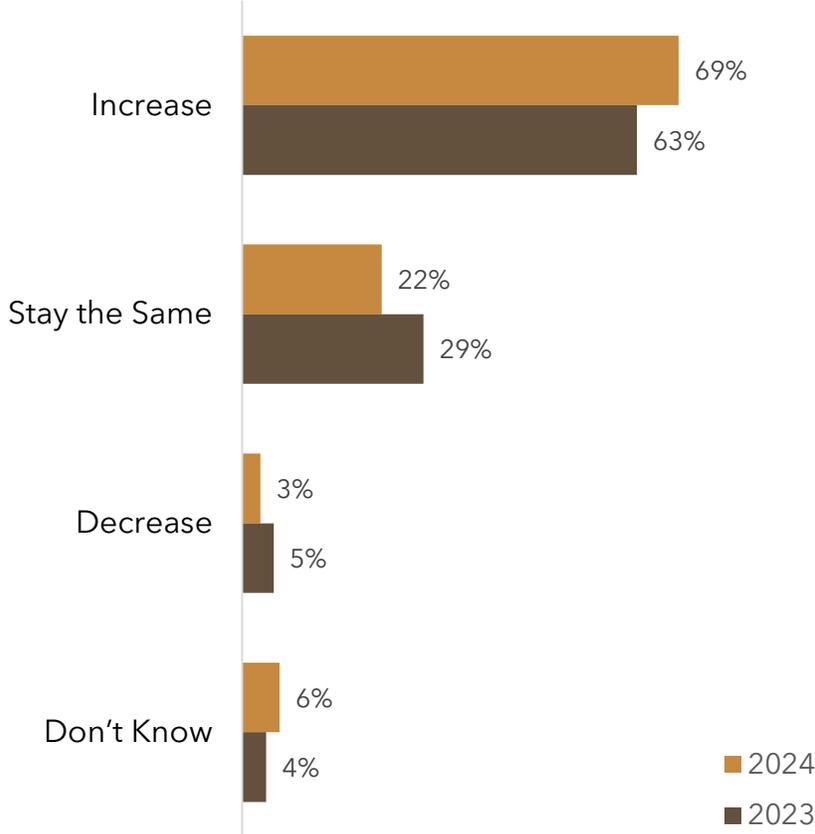


Visitor Volume in Golden in the Next Five Years

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 seven-in-ten of stakeholders (69%) want visitors volume to increase in the next five years while 22% would like it to stay the same.
- In 2023 results it was observed that interestingly, 5% noted a desire to see fewer visitors. In 2024, only 3% note that they would like to see a decrease in volume of visitors.

Visitor Volume in Golden
(% of Stakeholders)



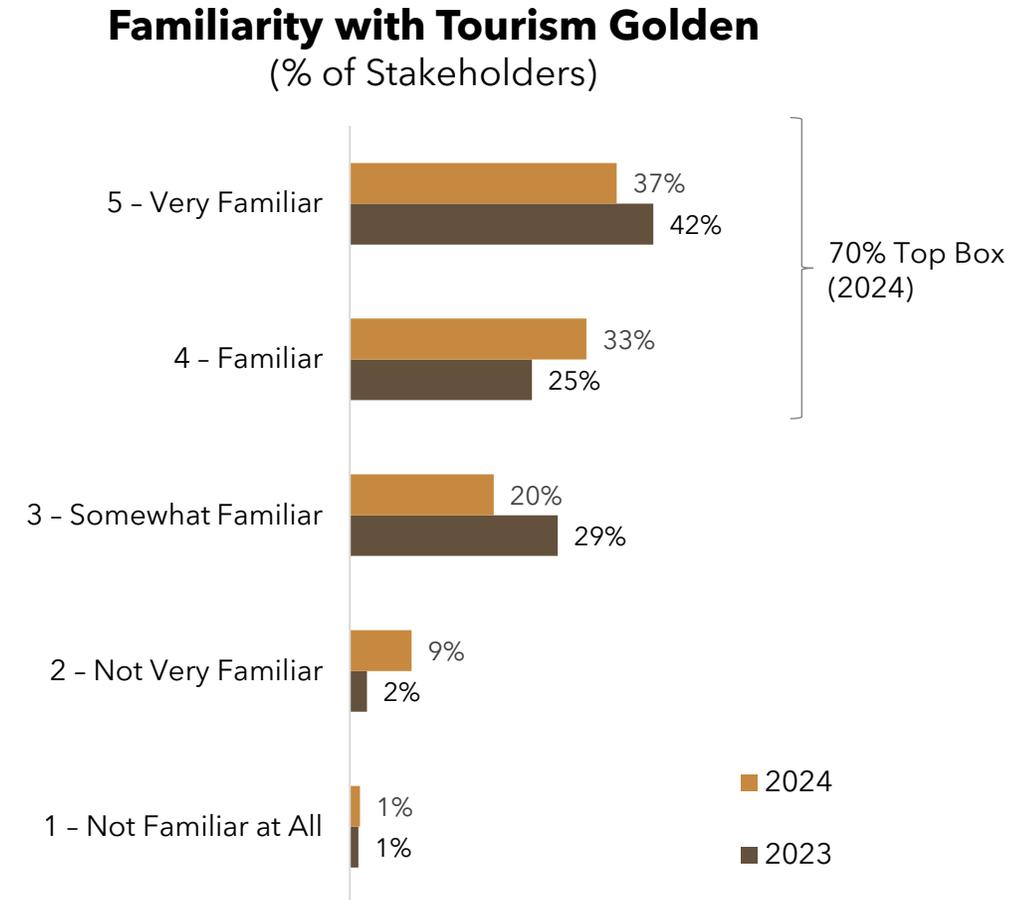
Would you like visitor volume in Golden to increase, decrease or stay the same in the next five years? n=68 (2024), n=80 (2023).

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 70% of stakeholders were familiar or very familiar with TG. This result was similar to 2023 and 2021 results (68% each).
- This suggests that Tourism Golden continues doing a good job, at a high-level, at communicating their role to stakeholders.



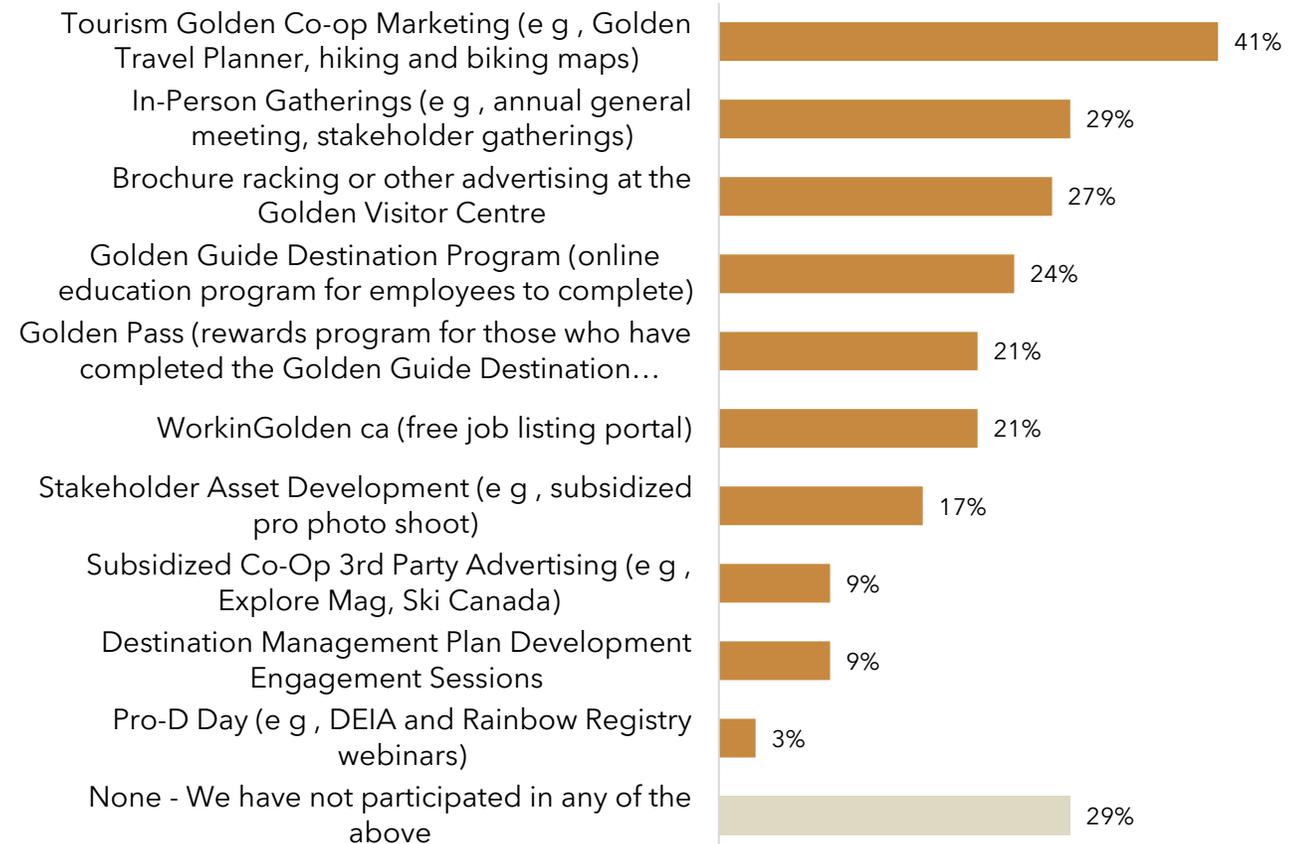
Participation in Tourism Golden Programs

Stakeholders were asked about participation in TG programs.

- 71% of stakeholders participated in at least one TG program.
- The most popular program participation was in co-op marketing (41% of stakeholders participated), followed by in-person gatherings such as AGM (29%), and brochure racking or other advertising in the Golden Visitor Centre (27%).

Tourism Golden Program Participation

(% of Stakeholders)



Participation in Tourism Golden Programs

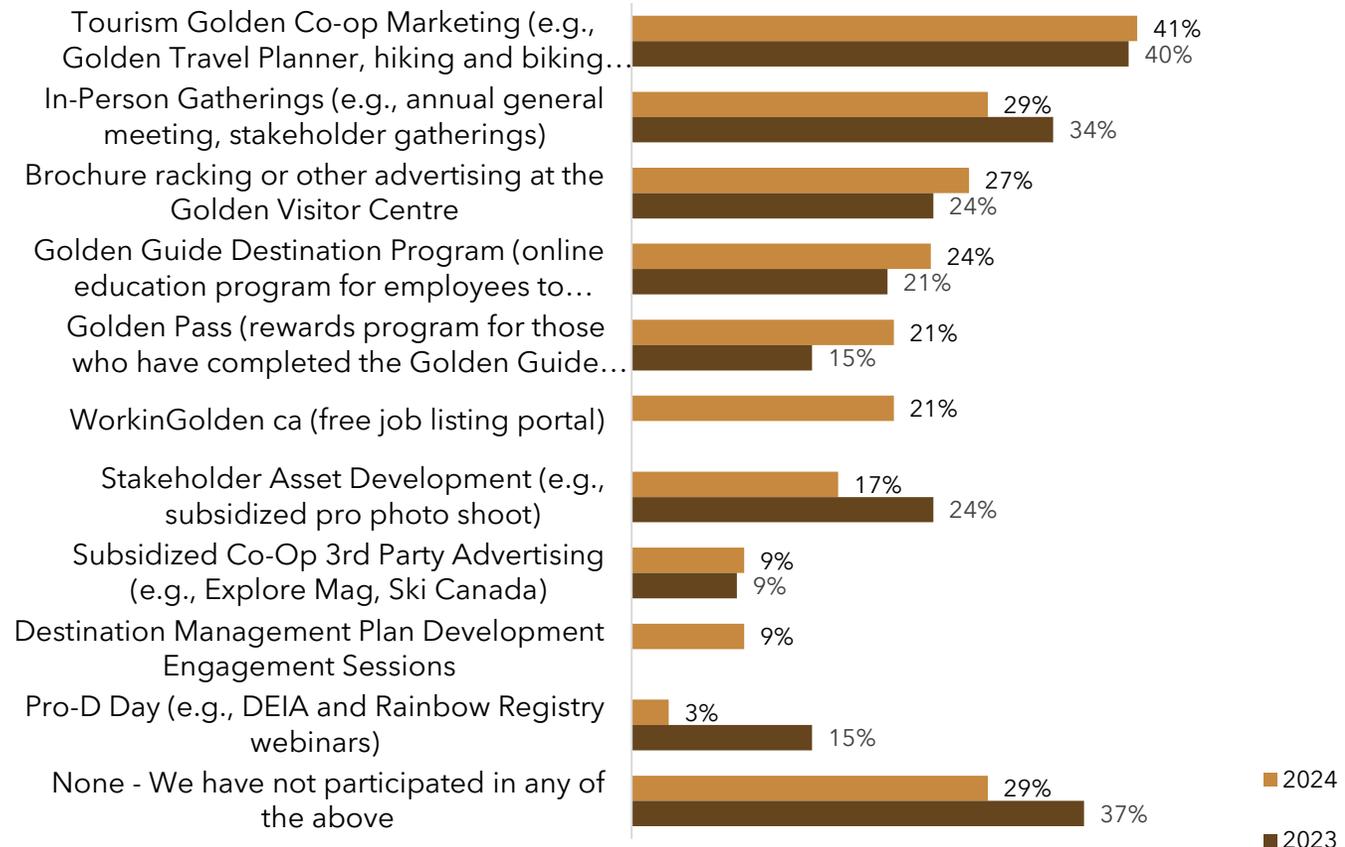
Looking at the comparison between 2024 and 2023 surveys, we see that generally participation among responding stakeholders is mixed. It should be noted that these results are not reflective of actual attendance and rather participation among responding stakeholders. As an example, the Stakeholder Asset Development had consistent registration over the last two years; however, 17% of responding stakeholders noted they participated compared to 24% in 2023.

That said, a higher portion of responding stakeholders did participate in at least one program in 2024 (71% - up from 63% in 2023).

Some of the programs that appear to have some lift over 2023 include:

- Golden Pass (+6 points to 21%);
- Golden Guide Destination Program (+3 points to 24%); and,
- Brochure racking (+3 points to 27%).

Tourism Golden Program Participation
(% of Stakeholders)



Over the past year, what Tourism Golden programs has your business or employees participated in? n=66 (2024), 66 stakeholders provided 113 responses, 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.

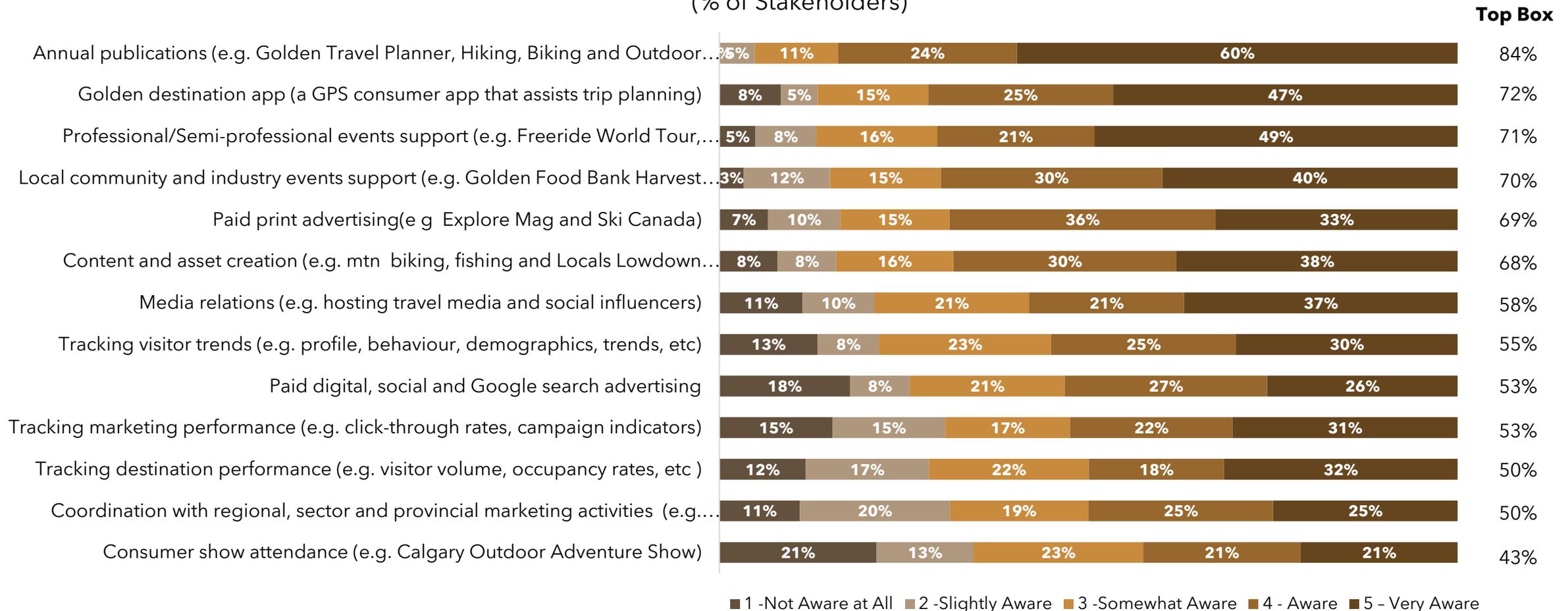
Awareness of Tourism Golden Programs

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 (84%), the Golden destination app (72%), professional/semi-professional event support (71%), local community and industry events support (70%), paid print advertising (68%), and content and asset creation (68%). Consumer show attendance (43%) has the lowest awareness amongst stakeholders.
- Similar to last year's results, the marketing activity with the most awareness continue to be annual publications (only 1 percentage point down from 85% in 2023). It is noteworthy that in 2024, the Golden Destination App is the second activity with the highest awareness with a 12 percentage points increase from 60% in 2023. Local community and industry events support saw another notable increase of 12 percentage points from 58% last year).

Awareness of Tourism Golden Programs

Awareness of Tourism Golden Marketing Activities (% of Stakeholders)



Top Box

Awareness of Tourism Golden Programs

Tourism Golden Marketing Programs	2024 Top Box	2023 Top Box	2021 Top Box
Annual publications (e.g. Golden Travel Planner, Hiking, Biking and Outdoor Discovery maps)	84%	85%	91%
Golden destination app (a GPS consumer app that assists trip planning)	72%	60%	NA
Professional/Semi-professional events support (e.g. Freeride World Tour, Golden 24)	71%	65%	76%*
Local community and industry events support (e.g. Golden Food Bank Harvest Dinner, Chamber's Business & Community Excellence Awards - Tourism Award, Golden Pride)	70%	58%	NA
Paid print advertising (e.g. Explore Mag and Ski Canada)	69%	65%	78%
Content and asset creation (e.g. mtn biking, fishing and Locals Lowdown videos and user-generated content generation)	68%	64%	60%
Media relations (e.g. hosting travel media and social influencers)	58%	58%	59%
Tracking visitor trends (e.g. profile, behaviour, demographics, trends, etc)	55%	48%	NA
Paid digital, social and Google search advertising	53%	49%	55%
Tracking marketing performance (e.g. click-through rates, campaign indicators)	53%	47%	NA
Tracking destination performance (e.g. visitor volume, occupancy rates, etc)	50%	49%	NA
Coordination with regional, sector and provincial marketing activities (e.g. Golden Triangle, Kootenay Dirt)	50%	54%	55%
Consumer show attendance (e.g. Calgary Outdoor Adventure Show)	43%	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=59-64 (2024), n=79-83 (2023), n=60 (2021). * Note that the wording was slightly different in 2021.

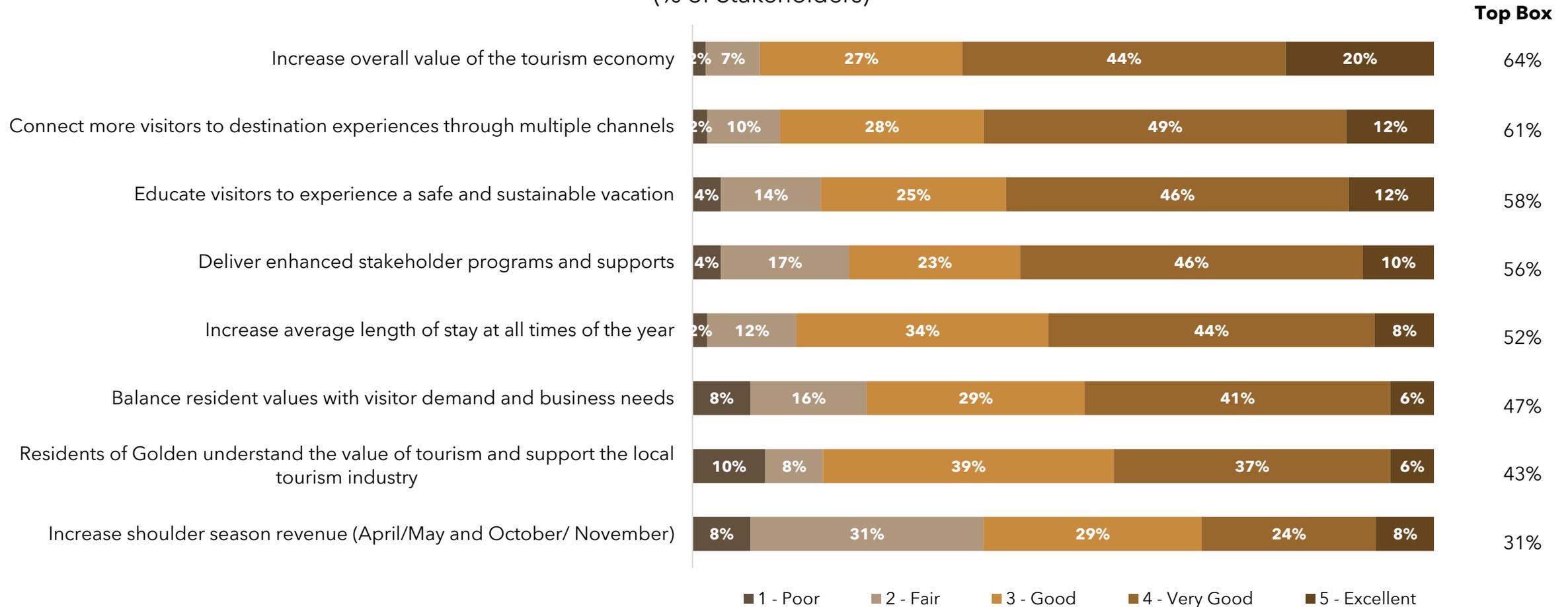
Tourism Golden Strategic Objective Performance

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 (64%) 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 (61% rated performance as 'very good' or 'excellent'), educating visitors to experience a safe and suitable vacation (58% rated performance as 'very good' or 'excellent'), and delivering enhanced stakeholder programs and supports (56% rated performance as 'very good' or 'excellent').
- Similar to last year's results, the largest area for improvement or focus is still increasing shoulder season occupancy and rates with only three-in-ten rating this area's performance as 'very good' or 'excellent' (31%) and 8% rating performance as 'poor'. That said, in 2024 ratings have notably increased compared to 2023 results (+14 percentage points compared to 17% in 2023).
- Additional areas of improvement include educating residents of Golden to understand the value of tourism and support the local tourism industry (10% rates as 'poor') and balancing resident values with visitor demand and business needs (8% rated as 'poor').

Tourism Golden Strategic Objective Performance

Tourism Golden Strategic Objective Performance (% of Stakeholders)



In Tourism Golden's 2022-2027 strategic plan, there are four themes that directly impact the tourism industry include: 1. Economic Contribution, 2. Visitor Experience, 3. Stakeholder Experience, and, 4. Resident/Community Experience. Based on these themes, 8 key objectives were identified. How would you rate Tourism Golden's performance on each of those objectives. n=50-55

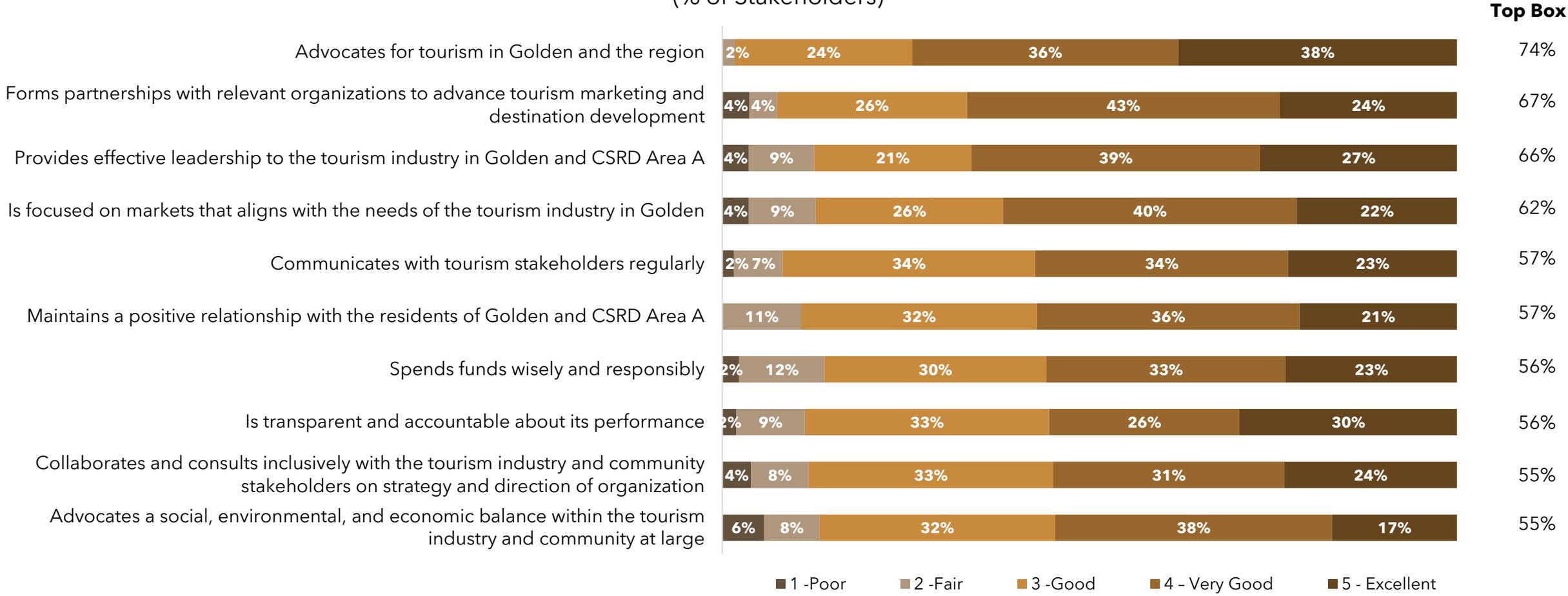
Tourism Golden Business Performance

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 (74% rated as 'very good' or 'excellent') and TG forms partnerships with relevant organizations to advance tourism marketing and destination development (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 Collaborates and consults inclusively with the tourism industry and community stakeholders on strategy and direction of organization (55% rated as 'very good' or 'excellent' with 4% rating as 'poor') and advocates for social, environmental and economic balance within the tourism industry and the community at large (55% rated as 'very good' or 'excellent' with 6% 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=43-61.

Tourism Golden Business Performance

Tourism Golden Business Performance

(% of Stakeholders)



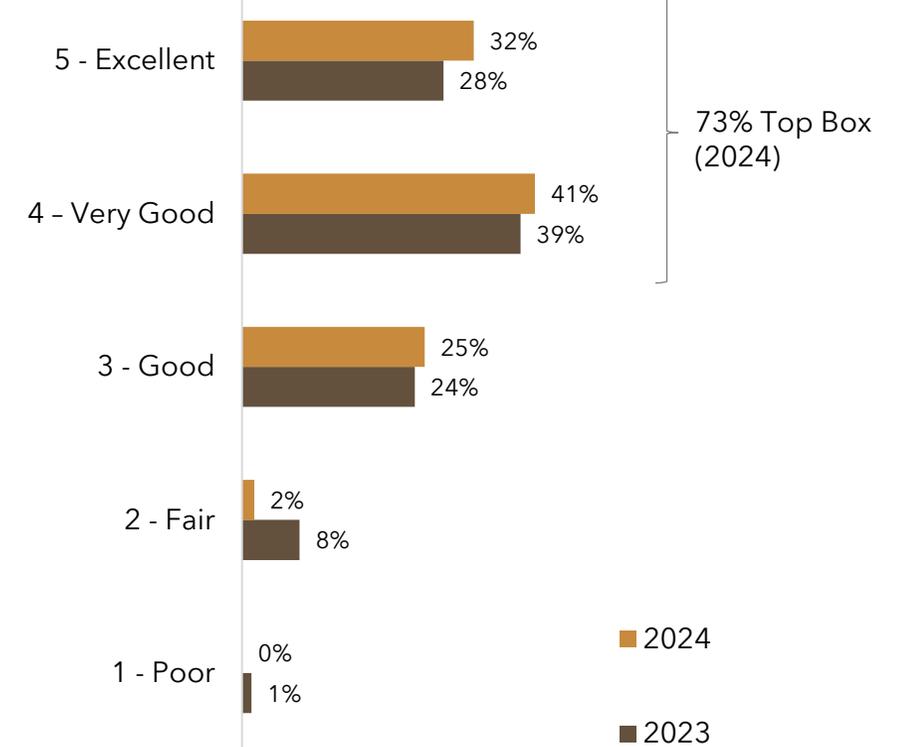
Tourism Golden Overall Business Performance

Stakeholders were asked to rate the overall performance of TG.

- In 2024, 73% of stakeholders rated TG's overall performance as 'very good' or 'excellent'. This is up 6 percentage points from 2023 (63%).
- It is noteworthy that in 2024, 0% rated Tourism Golden's overall performance as 'poor'; down from 1% in 2023 and 2% in 2021.

Tourism Golden Overall Performance

(% of Stakeholders)



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 2 mentions were marketing/promotion (13%) and modernize/innovation in Marketing approach (11%). Collaboration with Stakeholders, improve infrastructure to support sustainable/balanced growth and continue current work (9% each) round-out the top 5 most important business activities.
- There has been a sizable shift in responses from previous years especially with the modernization/innovation in marketing approach. Stakeholders shared their view in needing more innovative approaches to attracting visitors year-round, specially shoulder season, which could potentially bring more balance between resident and tourism needs.

Most Important Business Activity to Support Tourism Industry in Golden

(% of Stakeholders)



In your opinion, what is the most important thing Tourism Golden could do to support the tourism industry in Golden? n=36. 36 stakeholders provided 58 responses (2024). n=55. 55 stakeholders provided 53 responses (2023), n=37. 37 stakeholder provided 51 responses (2021), n = 41. 41 stakeholders provided 51 responses (2016). The percent totals to more than 100% because stakeholders could provide more than one most important business activity.

Tourism Golden Important Business Activities

Top Rated Important Business Activities	2024	2023	2021	2016
Marketing/Promotion	13%	21%	30%	21%
Modernize/Innovation in Marketing Approach	11%	4%	3%	8%
Continue Current Work	9%	9%	43%	38%
Collaboration with Stakeholders	9%	9%	11%	18%
Improve infrastructure to support sustainable/balanced growth	9%	8%	0%	0%
Advocate for Tourism in Golden	5%	8%	8%	0%
Affordable housing	5%	11%	0%	0%
Support for All New, Small, Local Businesses	4%	17%	16%	13%
Encourage Responsible/Sustainable/Eco Tourism	4%	6%	11%	3%
Encourage Transportation/Shuttles	4%	2%	3%	8%
Product Development	4%	2%	0%	3%
Employment (living wages, support businesses in finding staff,, etc)	4%	N/A	N/A	N/A
Educate visitors on how to adventure responsibly, safety and nature/wildlife protection	4%	N/A	N/A	N/A
Encourage/Develop Events (post COVID)	2%	8%	8%	8%
Parking	2%	4%	0%	0%
Promote the completion of the TransCanada Kicking Horse Canyon Project	2%	4%	0%	0%
Other comments	13%	8%	0%	0%

In your opinion, what is the most important thing Tourism Golden could do to support the tourism industry in Golden? n=36. 36 stakeholders provided 58 responses (2024). n=55. 55 stakeholders provided 53 responses (2023), n=37. 37 stakeholder provided 51 responses (2021), n = 41. 41 stakeholders provided 51 responses (2016). The percent totals to more than 100% because stakeholders could provide more than one most important business activity. 37

Barriers to Growth

Barriers to Growth in Tourism Development

Stakeholders were asked to rate various elements on the magnitude as a barrier to the development and growth of tourism in Golden. They were also able to provide additional elements if they were so inclined.

- Similar to last year, the largest barrier to tourism growth continues to be housing. In fact, 75% noted that affordable housing was a 'large' or 'extreme' barrier while 67% said the same of housing shortages. That said, these two elements saw decreases compared to 2023 (down 9 percent points from 84% in 2023 and down 12 percentage points from 79% in 2023, respectively).
- In 2024, Outdated Community Planning is the third top barrier to growth in tourism development with 47% rating it as a 'large' or 'extreme' barrier to growth.
- Transportation is also a challenge to tourism development. More than four-in-ten (45%) see transportation to Golden as a 'large' or 'extreme' barrier to growth while 42% gave the same ratings for transportation within Golden.

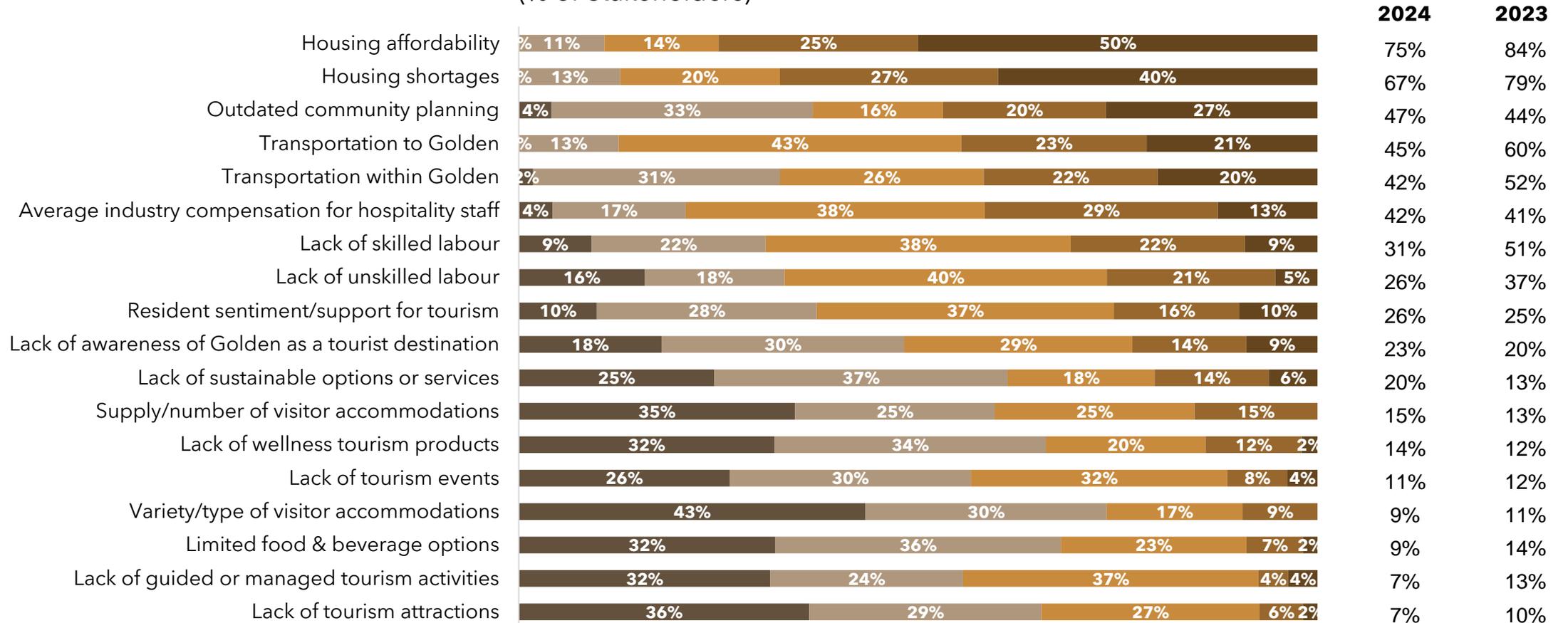
It should be noted that the Kicking Horse Canyon Phase IV project impacted Golden housing and transportation along Highway 1 for over three years until it wrapped up in July 2024. Going forward, it will be important to understand if these issues remain post-Kicking Horse Canyon Phase IV project.

Barriers to Growth in Tourism Development

Barriers to Growth in Tourism Development

(% of Stakeholders)

Top Box
(Barriers)



■ 1 - Not a Barrier at All ■ 2 - Somewhat of a Barrier ■ 3 - Moderate Barrier ■ 4 - Large Barrier ■ 5 - Extreme Barrier

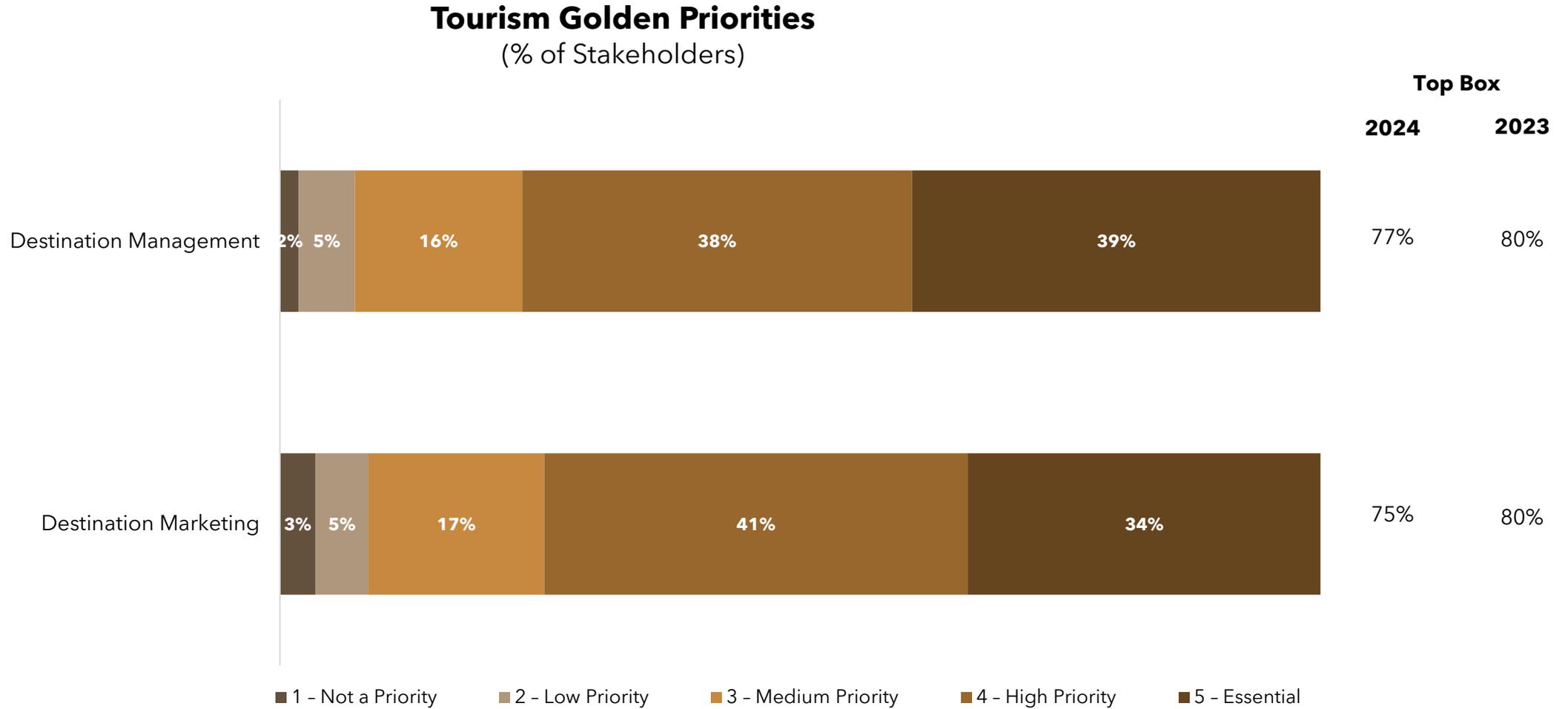
Priorities Moving Forward

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 approximately three-quarters of stakeholders rating these as 'high priority' or 'essential' (77% and 75%, respectively).
- Interestingly, Destination Management has a higher proportion of stakeholders noting it as 'essential' (39%) compared to Destination Marketing (34%).
- Ratings for these two priorities are slightly lower in 2024 compared to 2023 results. Destination Marketing (77% vs 80% in 2023) and Destination Management (75% vs 80% in 2023).

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%), support the sustainable and responsible growth of visitor volumes and tourism revenues (84%), measure the value of visitors' economic impact (76%), Encouraging environmental sustainability of tourism in Golden (78%) and Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met (78%).
- The following tables provide the top priorities by category as well as the full ratings.

Level of Priority - Tactics

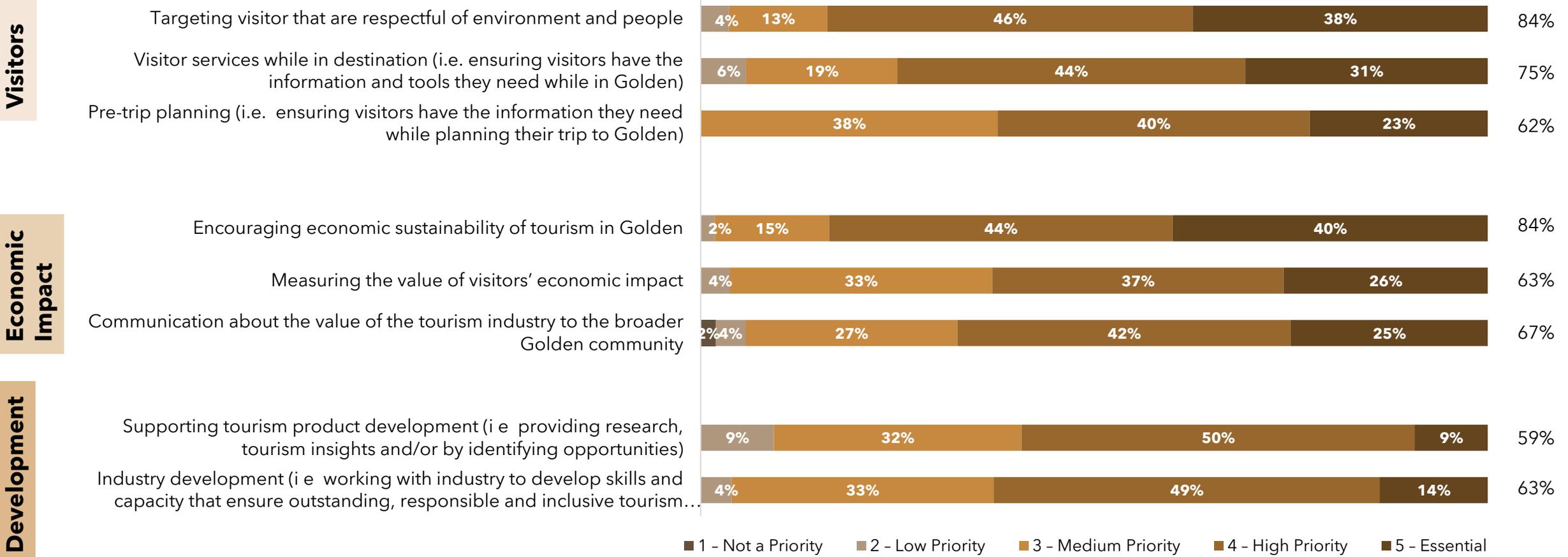
	Tactics	Top Box
Visitors	Targeting visitor that are respectful of environment and people	84%
	Visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden)	75%
	Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	62%
Economic Impact	Encouraging economic sustainability of tourism in Golden	84%
	Measuring the value of visitors' economic impact	63%
	Communication about the value of the tourism industry to the broader Golden community	67%
Development	Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	59%
	Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding, responsible and inclusive tourism experiences)	63%
Development Sustainability	Support the sustainable and responsible growth of visitor volumes and tourism revenues	84%
	Encouraging environmental sustainability of tourism in Golden	78%
	Advocate for Golden to be a physically accessible destination	59%
	Advocate for Golden to be a diverse and inclusive destination	64%
Community & Government Relations	Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	78%
	Supporting community organizations on labour shortages and affordable housing issues	72%
	Build resident support for and engagement with tourism in Golden	69%
Research	Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)	67%

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



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 = 51 - 56.

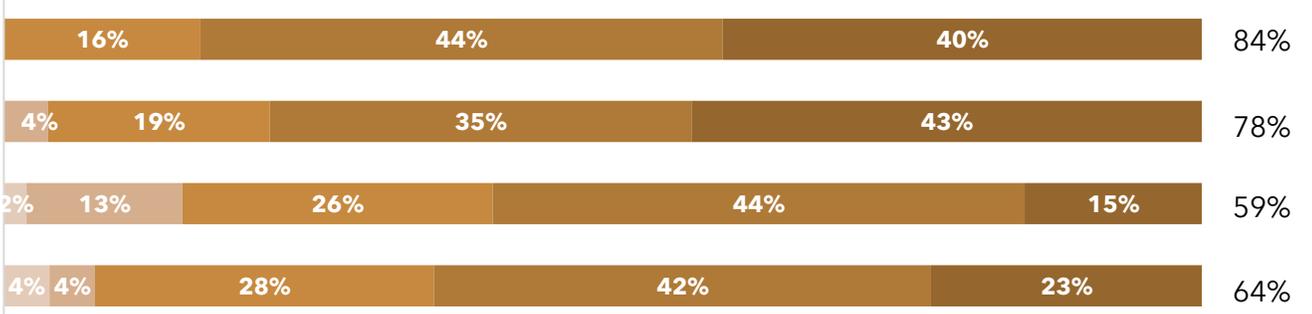
Level of Priority - Tactics

Tourism Golden Tactics Priorities (% of Stakeholders)

Top Box

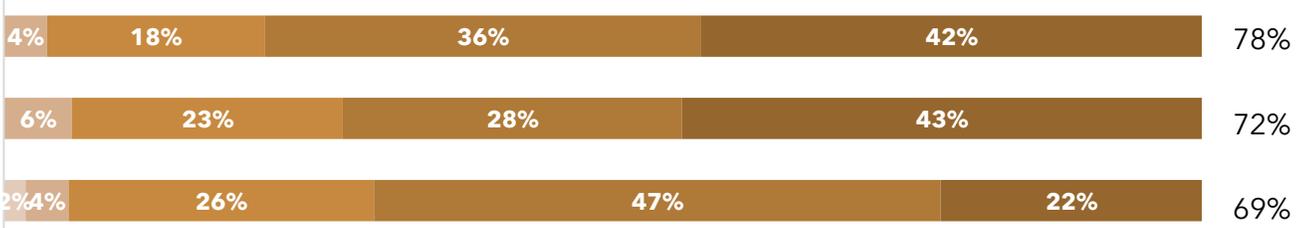
Development
Sustainability

- Support the sustainable and responsible growth of visitor volumes and tourism revenues
- Encouraging environmental sustainability of tourism in Golden
- Advocate for Golden to be a physically accessible destination
- Advocate for Golden to be a diverse and inclusive destination



Community &
Government
Relations

- Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met
- Supporting community organizations on labour shortages and affordable housing issues
- Build resident support for and engagement with tourism in Golden



Research

- Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)



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

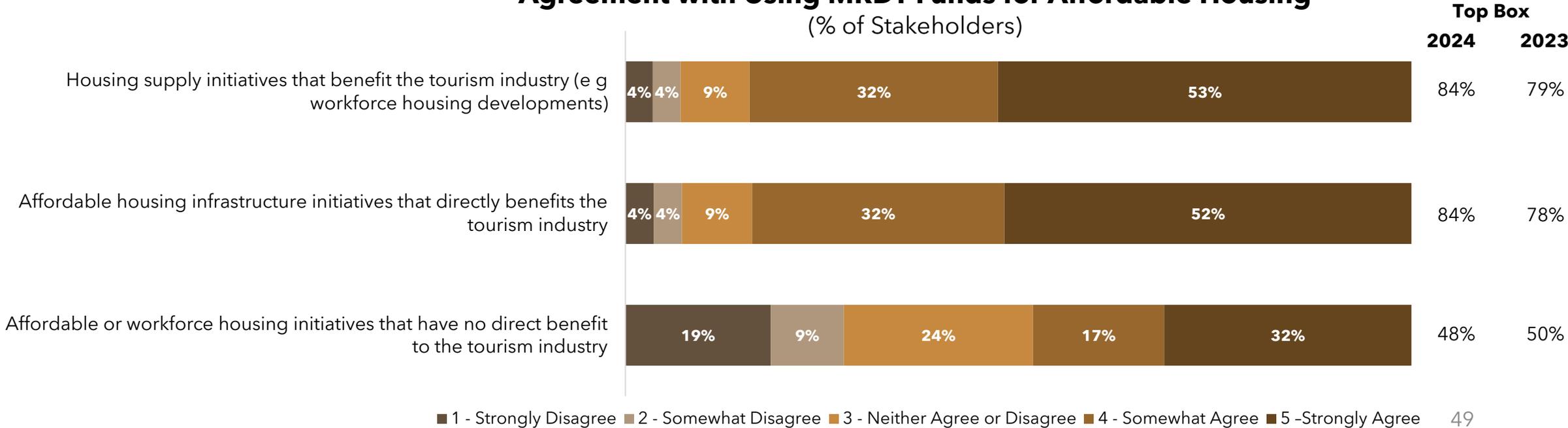
	Tactics	Top Box (2024)	2023	2021
Visitors	Targeting visitor that are respectful of environment and people	84%	74%	NA
	Visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden)	75%	74%	80%
	Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	62%	73%	71%
Economic Impact	Encouraging economic sustainability of tourism in Golden	84%	81%	NA
	Measuring the value of visitors' economic impact	63%	76%	NA
	Communication about the value of the tourism industry to the broader Golden community	67%	63%	71%
Development	Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	59%	65%	73%
	Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding, responsible and inclusive tourism experiences)	63%	70%	73%
Development Sustainability	Support the sustainable and responsible growth of visitor volumes and tourism revenues	84%	84%	NA
	Encouraging environmental sustainability of tourism in Golden	78%	73%	NA
	Advocate for Golden to be a physically accessible destination	59%	63%	NA
	Advocate for Golden to be a diverse and inclusive destination	64%	63%	NA
Community & Government Relations	Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	78%	80%	NA
	Supporting community organizations on labour shortages and affordable housing issues	72%	73%	69%
	Build resident support for and engagement with tourism in Golden	69%	67%	NA
Research	Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)	67%	65%	62%

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, 84% agree that MRDT funds be used for ‘housing supply initiatives that benefit the tourism industry’ and 84% agree with ‘affordable housing infrastructure initiatives that directly benefit the tourism industry’. Although 38% still disagree, almost half (48%) 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)



How much do you agree with the following statement about the use of Golden’s MRDT funds for affordable housing? n=54-57

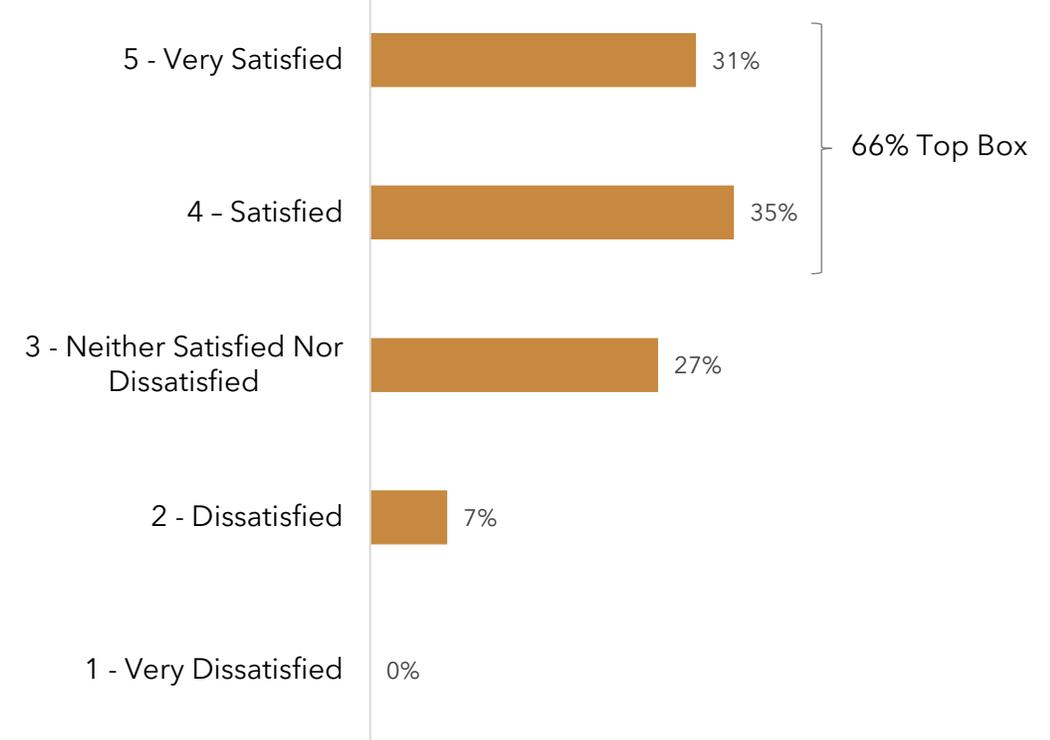
Tourism Golden Use of MRDT Funding

Stakeholders were asked about their satisfaction with Tourism Golden's use of MRDT funds.

- Two-thirds (66%) of stakeholders are satisfied or very satisfied with Tourism Golden's use of MRDT funds.
- It is noteworthy that 0% were very dissatisfied with Tourism Golden's use of MRDT funds; however, 7% did note some dissatisfaction.

Tourism Golden's Use of MRDT Funds

(% of Stakeholders)



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 (63% and 54%, respectively).
- Other top five responses were enhancing visitor information and education on responsible and respectful behaviour (51%), affordable housing initiatives (51%), and enhancing visitor awareness of safe and responsible backcountry recreation (39%). These top five responses remained the same from 2023 results.
- Stakeholders mentioned five other sustainability initiatives they would like to see implemented in Golden.

Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 8)	Stakeholder Rating	Lower Rated Sustainability Initiatives (Bottom 5)	Stakeholder Rating
1. Increasing shoulder season visitation	63%	9. Encouraging new tourism product development that is environmentally sustainable	26%
2. Attracting and retaining tourism labour	54%	10. Gathering data to inform the tracking and management of visitor volume, value and behaviour	25%
3. 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)	51%	11. Understanding and tracking Golden resident sentiment towards tourism	18%
4. Affordable housing initiatives	51%	12. Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)	18%
5. Enhancing visitor awareness of safe and responsible backcountry recreation	39%	13. Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)	14%
6. Increasing visitor yield (i.e. expenditures per visitor)	37%		
7. Targeting 'responsible tourists' in marketing initiatives	35%		
8. Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction	30%		

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=74. 74 stakeholders provided 263 responses. The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 8)	2024 Rating	2023 Rating
1. Increasing shoulder season visitation	63%	58%
2. Attracting and retaining tourism labour	54%	54%
3. 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)	51%	43%
4. Affordable housing initiatives	51%	47%
5. Enhancing visitor awareness of safe and responsible backcountry recreation	39%	39%
6. Increasing visitor yield (i.e. expenditures per visitor)	37%	32%
7. Targeting 'responsible tourists' in marketing initiatives	35%	32%
8. Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction	30%	32%

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=74. 74 stakeholders provided 263 responses. (2024), 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)	2024 Rating	2023 Rating
9. Encouraging new tourism product development that is environmentally sustainable	26%	35%
10. Gathering data to inform the tracking and management of visitor volume, value and behaviour	25%	28%
11. Understanding and tracking Golden resident sentiment towards tourism	18%	30%
12. Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)	18%	11%
13. Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)	14%	16%

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.

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

content generation)						
Paid digital, social and Google Search advertising	☺	☺	☺	☺	☺	☺
Paid print advertising (e.g., Explore, and Ski Canada magazines)	☺	☺	☺	☺	☺	☺
Consumer show attendance (e.g., Calgary Outdoor Adventure Show)	☺	☺	☺	☺	☺	☺
Professional/Semi-Professional Events support (e.g., Freeride World Tour, Golden 24)	☺	☺	☺	☺	☺	☺
Local community and industry events support (e.g. Golden Food Bank Harvest Dinner, Chamber's Business & Community Excellence Awards - Tourism Award, Golden Pride)	☺	☺	☺	☺	☺	☺
Annual publications (e.g., Golden Travel Planner, Hiking, Biking and Outdoor Discovery maps)	☺	☺	☺	☺	☺	☺
Golden Destination app (a	☺	☺	☺	☺	☺	☺

a GPS consumer app that assists trip planning)						
Tracking marketing performance (e.g. click-through rates, campaign indicators)	☺	☺	☺	☺	☺	☺
Tracking destination performance (e.g. visitor volume, occupancy rates, etc.)	☺	☺	☺	☺	☺	☺
Tracking visitor trends (e.g. profile, behaviour, demographics, trends, etc)	☺	☺	☺	☺	☺	☺

Over the past year (November 2023 - October 2024), what Tourism Golden programs has your business or employees participated in, if any?

Please select all that apply.*

- Pro-D Day (e.g., digital media strategy, digital marketing, social media content creation)
- Stakeholder Asset Development (e.g., subsidized pro photo shoot)
- Tourism Golden Co-op Marketing (e.g., tourismgolden.com, Golden Travel Planner, hiking and biking maps)
- Subsidized Co-Op 3rd party advertising (e.g., Explore, Mountain Sledder magazines)
- In-Person gatherings (e.g., annual general meeting, stakeholder gatherings)
- Brochure racking or other advertising at the Golden Visitor Centre
- Golden Guide Destination Program (online education program for employees to complete)
- Golden Pass (rewards program for those who have completed the Golden Guide Destination Program)
- WorkingGolden.ca (free job listing portal)
- Destination Management Plan Development Engagement Sessions
- None - We have not participated in any of the above

Section 3 - Tourism Golden's Performance

This section asks about your impressions of Tourism Golden's performance over the past year as it relates to the 2022-2027 Strategic Plan. To review the strategic plan, please click [here](#).



In Tourism Golden's 2022-2027 strategic plan, there are four themes that directly impact the tourism industry include:

1. Economic Contribution;
2. Visitor Experience;
3. Stakeholder Experience; and,
4. Resident/Community Experience.

Based on these themes, 8 key objectives were identified. How would you rate Tourism Golden's performance on each of these objectives?

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
Increase overall value of the tourism economy	<input type="radio"/>					
Increase average length of stay at all times of the year	<input type="radio"/>					
Increase shoulder season revenue (April/May and October/November)	<input type="radio"/>					
Connect more visitors to destination	<input type="radio"/>					

experiences through multiple channels						
Educate visitors to experience a safe and sustainable vacation	<input type="radio"/>					
Deliver enhanced stakeholder programs and supports	<input type="radio"/>					
Residents of Golden understand the value of tourism and support the local tourism industry	<input type="radio"/>					
Balance resident values with visitor demand and business needs	<input type="radio"/>					

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?

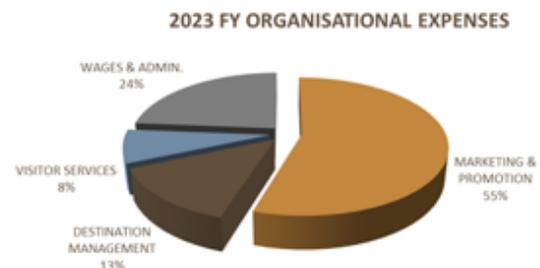
Please rate each on a scale where 1 = Poor and 5 = Excellent.*

	1 - Poor	2 - Fair	3 - Good	4 - Very Good	5 - Excellent	Don't Know

Communicates with tourism stakeholders regularly	G	G	G	G	G	G
Advocates for tourism in Golden and the region	G	G	G	G	G	G
Forms partnerships with relevant organizations to advance tourism marketing and destination development	G	G	G	G	G	G
Is transparent and accountable about its performance	G	G	G	G	G	G
Spends funds wisely and responsibly	G	G	G	G	G	G
Collaborates and consults inclusively with the tourism industry and community stakeholders on strategy and direction of organization	G	G	G	G	G	G
Is focused on markets that aligns with the needs of the tourism industry in Golden	G	G	G	G	G	G

Maintains a positive relationship with the residents of Golden and CSRD Area A	G	G	G	G	G	G
Provides effective leadership to the tourism industry in Golden and CSRD Area A	G	G	G	G	G	G
Advocates a social, environmental, and economic balance within the tourism industry and community at large	G	G	G	G	G	G

Tourism Golden is funded primarily by MRDT revenues. The breakdown of Tourism Golden's annual spending is shown below with more detailed information available in the 2023 Annual Report which can be found [here](#).



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)						
Development - Sustainability						
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
Community & Government Relations						
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

Research						
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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