



Tourism Golden

2021 Stakeholder Survey Final Report
May 2021



Executive Summary

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. In May 2021, TG initiated its second stakeholder survey to understand Stakeholder perceptions. The previous stakeholder survey was conducted in 2016 and was used to inform development of TG's 2017-2021 Strategic Plan. Results obtained here will be used to develop TG's 2022-2026 Strategic Plan.

APPROACH

Align Consulting Group worked with TG to develop content for the online survey, as well as administered, conducted analysis and developed this report. There was a 27% response rate which was lower than the 50% response rate achieved in 2016. The decline in response rate is most likely due to a larger initial stakeholder list, pandemic fatigue, including a no-travel order and the multitude of surveys that have been distributed to tourism business in 2020 and 2021. In 2021, community partners (50%) had the highest response rates followed by accommodation businesses (41%), activities/attractions (20%) and food and beverage, retail or tourism services (15%).

There are several important elements to understand when reading this report, they include:

- Where possible, results were compared to 2016 findings.
- TG's primary funding comes from 2% Municipal and Regional District Tax (MRDT) rate. The MRDT is collected by accommodation businesses. In BC, communities can collect up to 3% MRDT upon agreement by at least 50% of the accommodation properties. Increasing the rate to 3% MRDT was explored.
- The lingering and substantial impacts of the COVID-19 pandemic as well as on-going Highway 1 construction in the Kicking Horse Canyon causing highway closures and delays influenced survey results.

Executive Summary

RESULTS

2020 was a difficult year for everyone due to the COVID-19 pandemic. TG and tourism businesses in Golden have had to reduce or close business operations and adapt and create new business processes to market and provide Golden tourism experiences. Given the substantial impact on the tourism industry, it is not surprising that some performance scores have declined in 2021 compared to 2016.

TOURISM GOLDEN PERFORMANCE

- The majority (68%) of stakeholders are familiar with TG's programs and services, similar to 2016 results.
- Stakeholders had high awareness levels of TG printed marketing and advertising activities this is due to the fact that these programs have the highest stakeholder participation scores.
- Overall, in 2021, TG received very good - excellent ratings from the great majority (69%) of it's stakeholders. Although this score has declined from 75% in 2016.
 - Similar to 2016, open, honest and frequent communications was a key theme in stakeholder feedback. TG should continue it's efforts to engage and communicate with all (new, old, big, small) stakeholders. A relatively new component of communications and engagement is with Golden locals. Local resident engagement needed in order to ensure the tourism industry continues to have social license throughout the community.
 - In addition, in 2021, stakeholders had low scores for encouraging day visitors/passing traffic to stay longer and return later as an overnight visitor, as well as increasing shoulder season visitation and revenues.

Executive Summary

PRIORITIES MOVING FORWARD

- Similar to 2016, stakeholders identified that outdoor activity/adventure events have the most potential for future growth. This indicates that TG's current brand essence, Authentic Outdoors is supported by stakeholders.
- Stakeholders ranked top marketing priorities as digital initiatives including the TG website, social media and blog, digital advertising and image and asset development.
- 2021 priority initiatives outside of marketing suggest stakeholders support initiatives that encourage responsible tourism. Also, there is emerging support for enhanced tourism/community/tourism master planning and destination management. Stakeholders suggested community relations, tourism product development and communication about the value of tourism were higher priorities compared to 2016.
- Just under half of stakeholders support an increase in the MRDT rate, while 35% did not support and 22% were unsure. Half of stakeholders disagree with using MRDT funds for affordable housing initiatives. Support for the MRDT rate increase was likely linked to the on-going, substantial impacts of the COVID-19 pandemic.

SUSTAINABILITY INITIATIVES

- Increasing shoulder season visitation and providing responsible tourism information to visitors were the top-rated sustainability priorities. This is followed by measuring and understanding visitor volume, attracting and retaining tourism labour and targeting responsible tourists.

Report Table of Contents

1. Background and Objectives.....	6
2. Approach.....	7
3. Results.....	13
Familiarity with Tourism Golden.....	15
Participation in Tourism Golden Programs	16
Awareness of Tourism Golden Programs.....	17
Tourism Golden Strategic Objective Performance.....	19
Tourism Golden Business Performance.....	21
Tourism Golden Most Important Business Activity	30
Tourism Products and Experiences	33
Short and Long Term Barriers to Growth	36
Marketing Priorities	39
Priorities for Activities Outside of Marketing	45
Municipal and Regional District Tax (MRDT) Funds	48
Sustainability Initiatives	49
Overall Comments	51
4. Key Insights and Implications.....	53
5. Appendix.....	58

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 May 2021, TG initiated its second stakeholder survey to understand Stakeholder perceptions. The previous stakeholder survey was conducted in 2016 and was used to inform development of TG's 2017-2021 Strategic Plan. Results obtained here will be used to develop TG's 2022-2026 Strategic Plan.

Similar to 2016, 2021 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.

There are several important elements to understand when reading this report, they include:

- Where possible, results were compared to 2016 findings.
- TG's primary funding comes from 2% Municipal and Regional District Tax (MRDT) rate. The MRDT is collected by accommodation businesses. In BC, communities can collect up to 3% MRDT upon agreement by at least 50% of the accommodation properties. Increasing the rate to 3% MRDT was explored.
- The lingering and substantial impacts of the COVID-19 pandemic as well as on-going Highway 1 construction in the Kicking Horse Canyon causing highway closures and delays influenced survey results.

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 2016. Also, the Destination BC's MRDT Stakeholder Survey Guidebook¹ was used to assist in questionnaire development.
- TG provided ACG with an email distribution list of 254 stakeholders and 9 of those were removed because they were duplicates, closed or the email address was undeliverable. This resulted in 245 stakeholders that were sent the stakeholder survey via email.
- These stakeholders were sent the survey via email. To encourage responses, three email reminders and more than 70 reminder phone call were made between April 14 and April 30, 2021. In addition, an 'open-link' was developed and sent to stakeholders via two e-blasts by TG. This link was not specific to an individual email address.
- 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.

Analysis



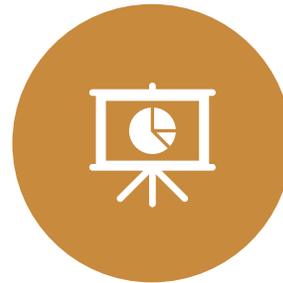
Responses were summarized with percentages.



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.



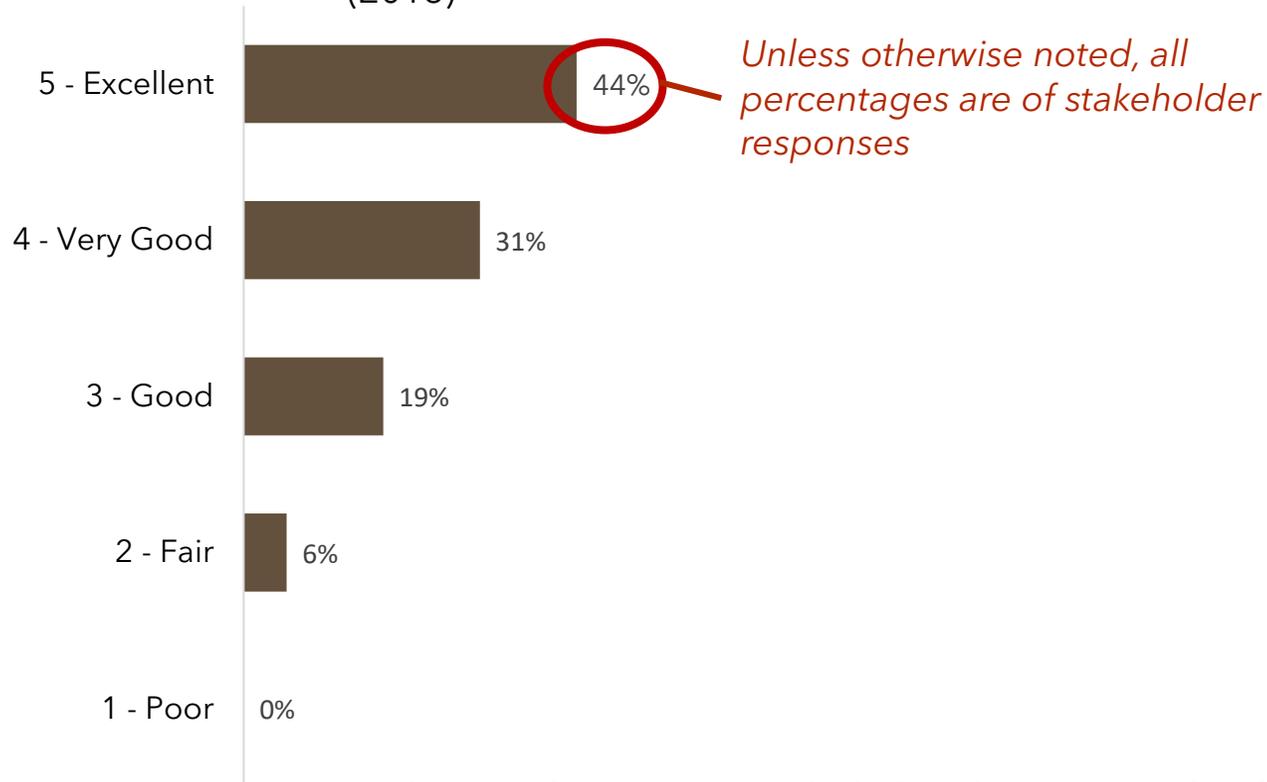
- Where possible, comparisons to 2016 were made.

-Differences were noted if 'top box' responses were more than 5% different.

Analysis

TIPS FOR READING

Tourism Golden Overall Performance (2016)



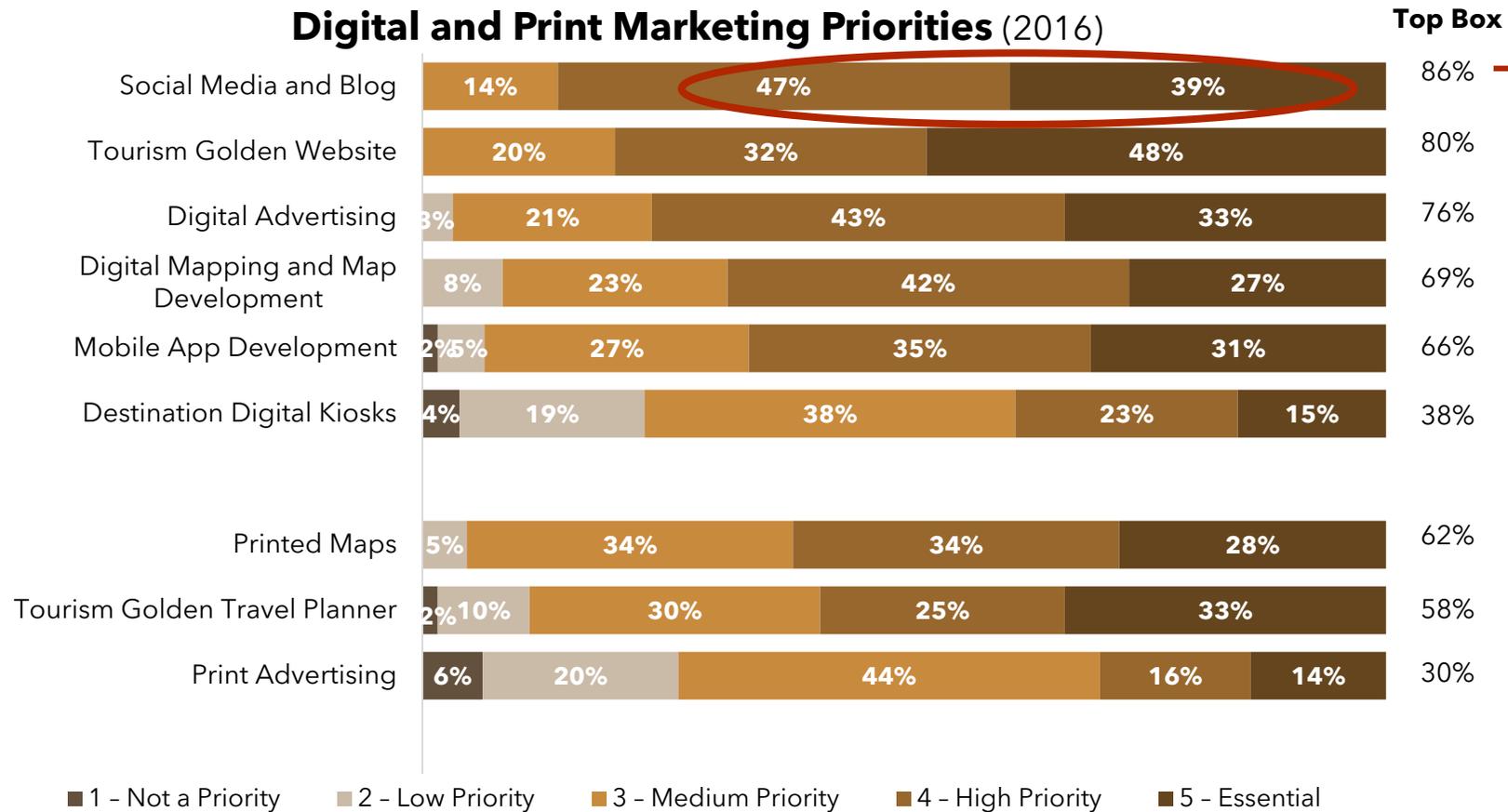
Open-Ended Responses

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.

Analysis

TIPS FOR READING



Top Box

Top Box analysis is equal to the percentage of the top two response categories. In this example the top box is 86%. The top box is also listed to the right of the chart.

Survey Responses

- There is approximately 245 businesses in TG's stakeholder list. 33% are accommodations, 20% are activities and attractions, 42% were food and beverage, retail and tourism services and 5% are community partners.
- In total, 75 people clicked on the survey link via that email or open-link distribution. When duplicates and responses with no data were removed, there were 65 responses. This equals a 27% response rate which was lower than the 50% response rate achieved in 2016 (see next page for detail).
- The decline in response rate is most likely due to a larger initial stakeholder list, pandemic fatigue, including a no-travel order and the multitude of surveys that have been distributed to tourism business in 2020 and 2021.
- In 2021, community partners had the highest response rate (50%), followed by accommodation businesses (41%), activities/attractions (21%) and food and beverage, retail or tourism services (15%). Accommodations and community partners were more likely than other stakeholder groups to respond.

Survey Responses

STAKEHOLDER GROUPS	NUMBER OF STAKEHOLDERS (% All Stakeholders)	NUMBER OF RESPONSES (% All Responses)	RESPONSE RATE
Accommodations	82 (33%)	34 (52%)	41%
Activities and Attractions	49 (20%)	10 (15%)	20%
Food and Beverage, Retail and Tourism Services	102 (42%)	15 (23%)	15%
Community Partner	12 (5%)	6 (9%)	50%
TOTAL	245	65	27%

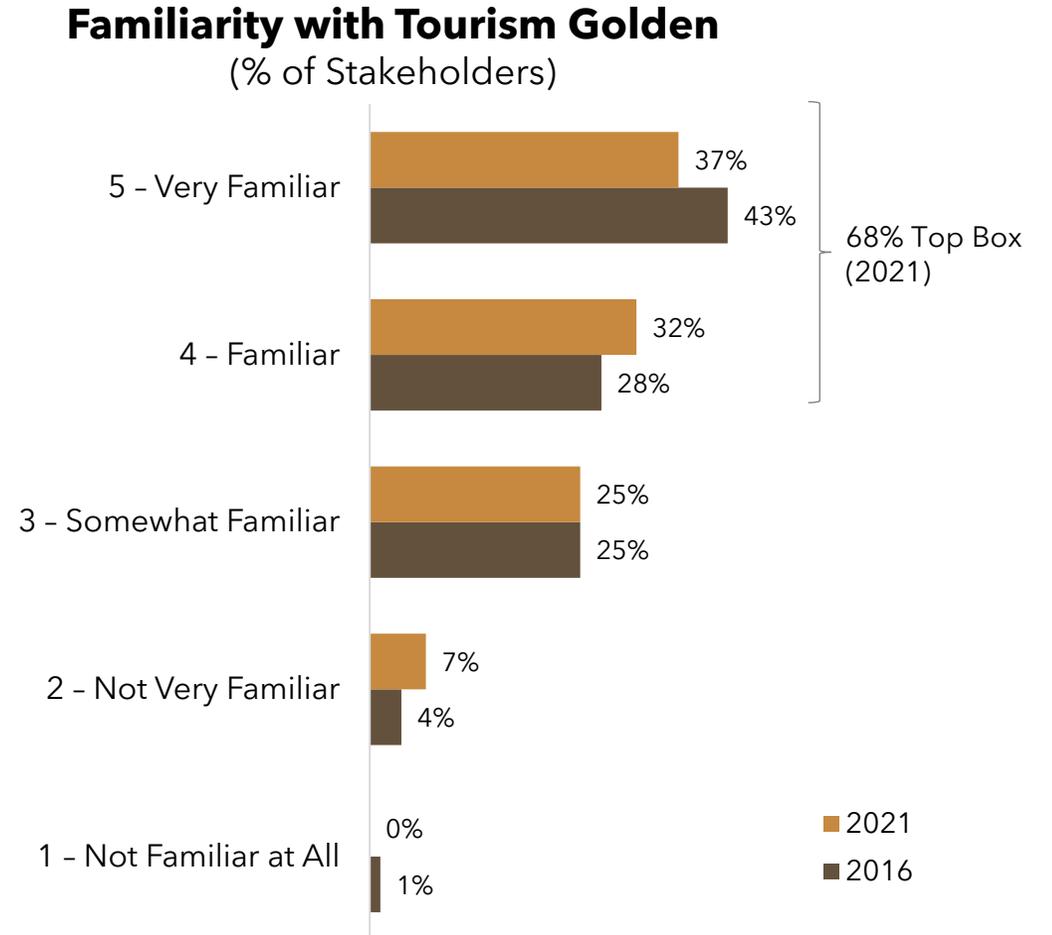
RESULTS

Tourism Golden 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 2016 results (70%).

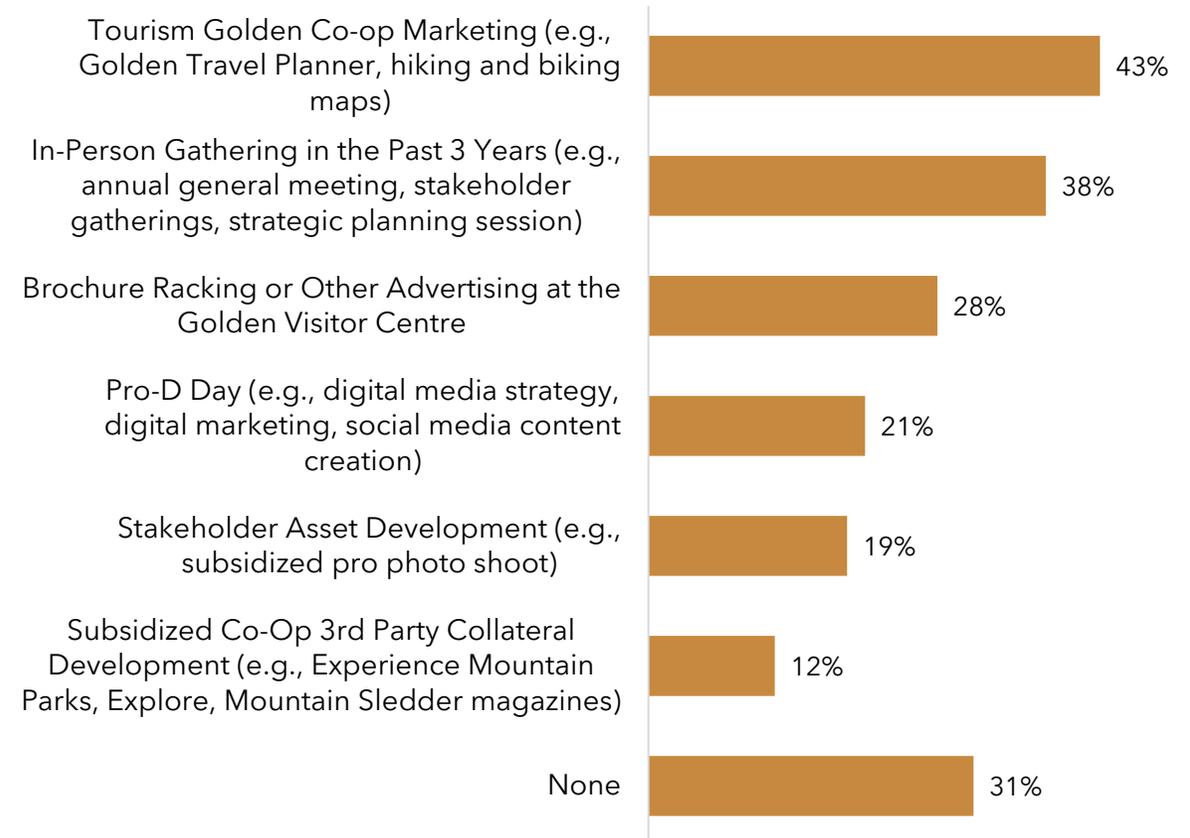


Participation in Tourism Golden Programs

Stakeholders were asked about participation in TG programs.

- 69% of stakeholders participated in at least one TG program.
- 43% of stakeholders participated in co-op marketing, 38% attended an in-person gathering while 28% participated in advertising in the Golden Visitor Centre.

Tourism Golden Program Participation
(% Stakeholder Participating)



Awareness of Tourism Golden Programs

Stakeholders were asked their awareness levels with marketing activities (see next page for details).

- Overall, stakeholders were most aware of the annual publications (91%), paid print advertising (78%), event support (76%), marketing and other research (66%) and content and asset creation (60%).
- Less than half of stakeholders were aware of consumer relations and show attendance (48%) and other marketing collateral generation (36%).
- Awareness of TG programs was related to program participation. For example, the highest awareness level was for annual publications (91%) and the highest program participation was for TG co-op marketing (e.g., Golden Travel Planning, hiking and biking maps).

Awareness of Tourism Golden Programs

Awareness of Tourism Golden Marketing Activities

(% of Stakeholders)



Top Box

91%

78%

76%

66%

60%

59%

55%

55%

48%

36%

Tourism Golden Strategic Objective Performance

Stakeholders were asked to rate performance on 12 strategic objectives outlined in the 2017-2021 strategic plan (seen next page for details).

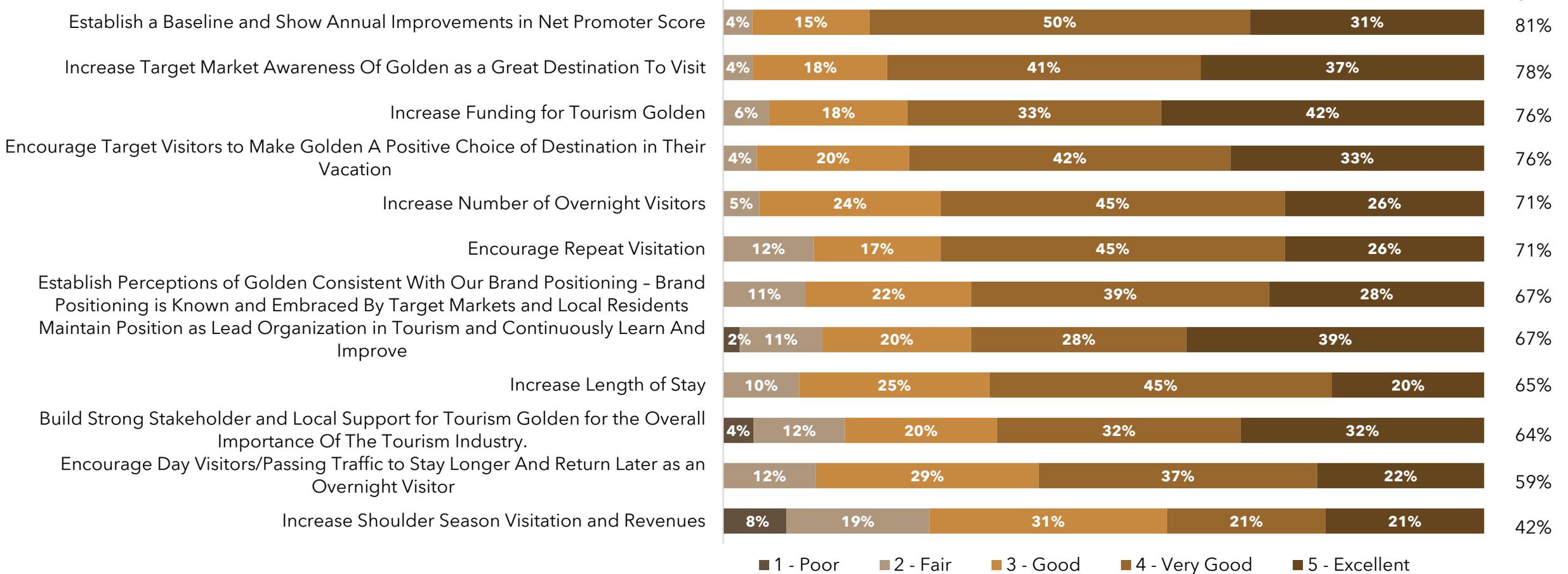
- The top three rated strategic objectives were, to establish a baseline and show annual improvements in Net Promoter Score¹, increase target market awareness of Golden as a great destination to visit and increase funding for TG.
- The bottom three rated strategic objectives were, build strong stakeholder and local support for TG for the overall importance of the tourism industry, encourage day visitors/passing traffic to stay longer and return later as an overnight visitor and increase shoulder season visitation and revenues.
- There were only two objectives that overlapped with 2016 stakeholder survey responses (increase length of stay and encouraging day visitors/passing traffic to stay longer and return later as an overnight visitor). The top box responses for these strategic objectives were very similar in 2021 compared to 2016.
 - Increase length of stay (2021 - 65%, 2016 - 67%).
 - Encouraging day visitors/passing traffic to stay longer and return later as an overnight visitor (2021 - 59%, 2016 - 62%).

Tourism Golden Strategic Objective Performance

Tourism Golden Strategic Objective Performance

(% of Stakeholders)

Top Box



Tourism Golden Business Performance

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

- The top three rated strategic objectives were, TG advocates for tourism in the region, TG spends funds wisely and responsibly, and TG forms partnerships with relevant organizations in order to advance tourism marketing and development.
- The bottom three rated strategic objectives were, TG has open, honest and frequent communications with stakeholders, collaborates and consults with tourism stakeholders and maintains a positive relationship with residents of Golden and Kicking Horse Country.
- Top box rating for business performance were compared to 2016.
 - Top box ratings for business performance increased for spends funds wisely (2021 - 74%, 2016 - 67%).
 - Top box ratings were similar for:
 - Advocates for tourism in Golden and the region (2021 - 84%, 2016 - 83%),
 - Forms partnerships with relevant organizations to advance tourism marketing and destination development (2021 - 72%, 2016 - 73%),
 - Is focused on markets that align with the needs of the tourism industry (2021 - 63%, 2016 - 67%), and
 - Advocates for social, environmental and economic benefits with the tourism industry and community at large (2021 - 61%, 2016 - 63%).

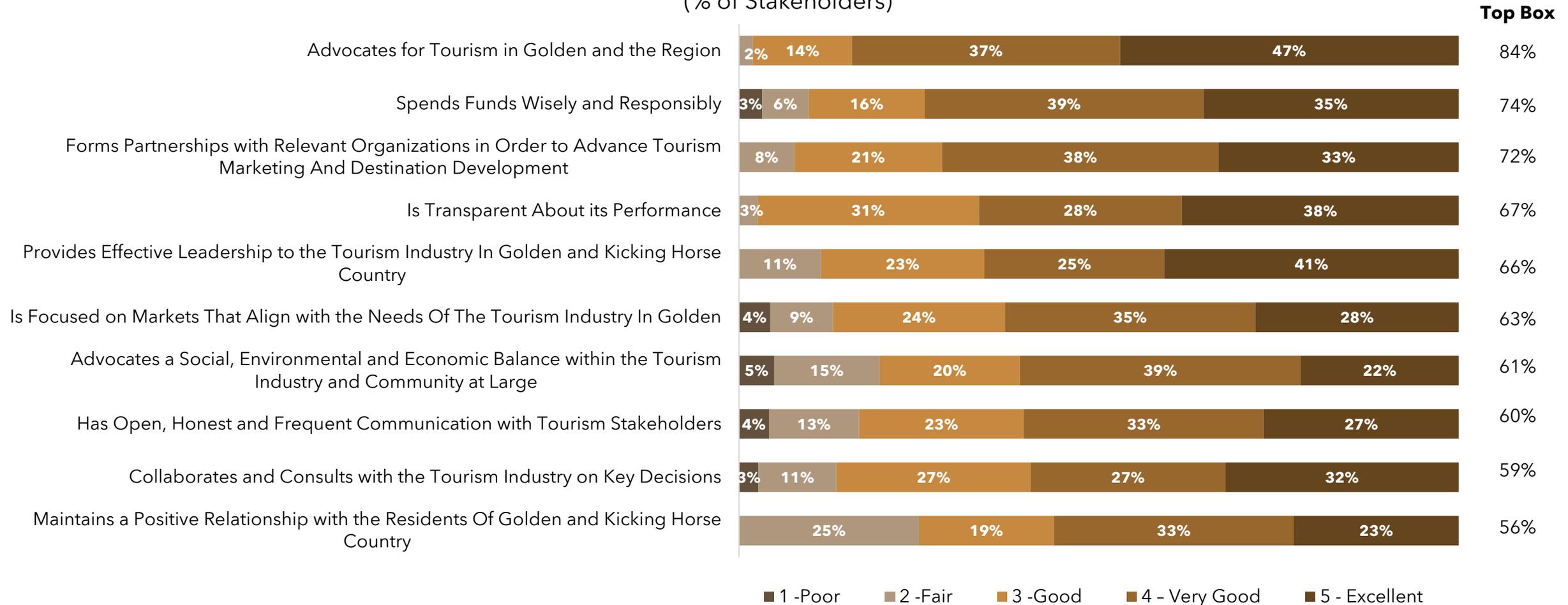
Tourism Golden Business Performance

Top box rating for business performance were compared to 2016 cont.

- Top box ratings for business performance declined for:
 - Is transparent about it's performance (2021 - 67%, 2016 - 81%),
 - Provides effective leadership to the tourism industry in Golden and Kicking Horse Country (2021 - 66%, 2016 - 72%),
 - Has open, honest and frequent communication with tourism stakeholders (2021 - 60%, 2016 - 72%),
 - Collaborates and consults with the tourism industry on key decisions (2021 - 59%, 2016 - 67%), and
 - Maintains a positive relationships with the residents of Golden and Kicking Horse Country (2021 - 56%, 2016 - 70%).

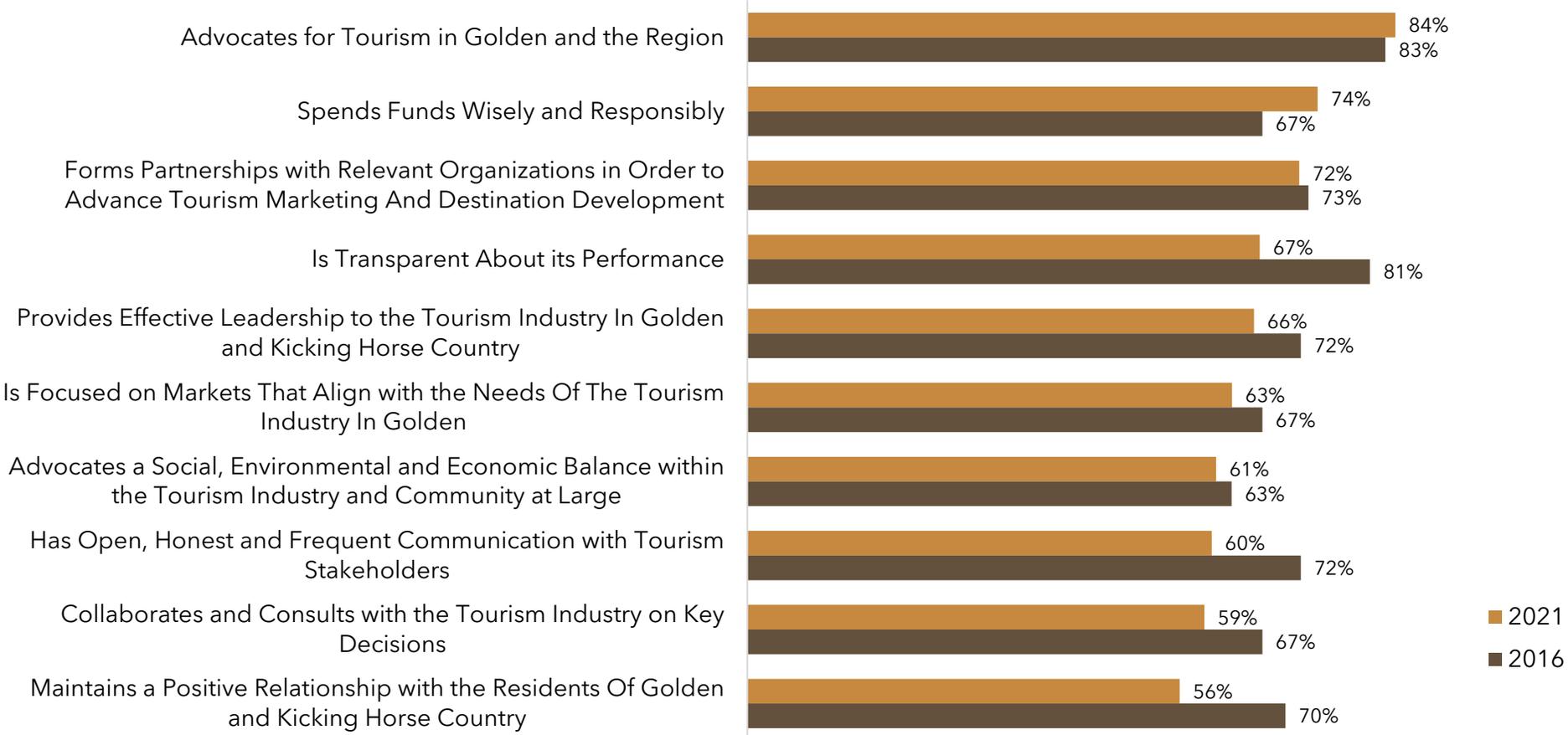
Tourism Golden Business Performance

Tourism Golden Business Performance (% of Stakeholders)



Tourism Golden Business Performance

Tourism Golden 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=39-51.

Tourism Golden Business Performance

Suggestions for better communication were asked of stakeholders who rated communication as poor or fair are shown below (6 stakeholders, 17%). Please note that Tourism Golden already distributes a monthly stakeholder newsletter.

'Sending out monthly newsletters to all those accommodators who collect your 2% tax'

'Nothing that would help my business'

'More advertising'

'I want to hear from my sector Board representatives'

'Have small group or individual meetings to discuss ideas, questions and concerns from stakeholders'

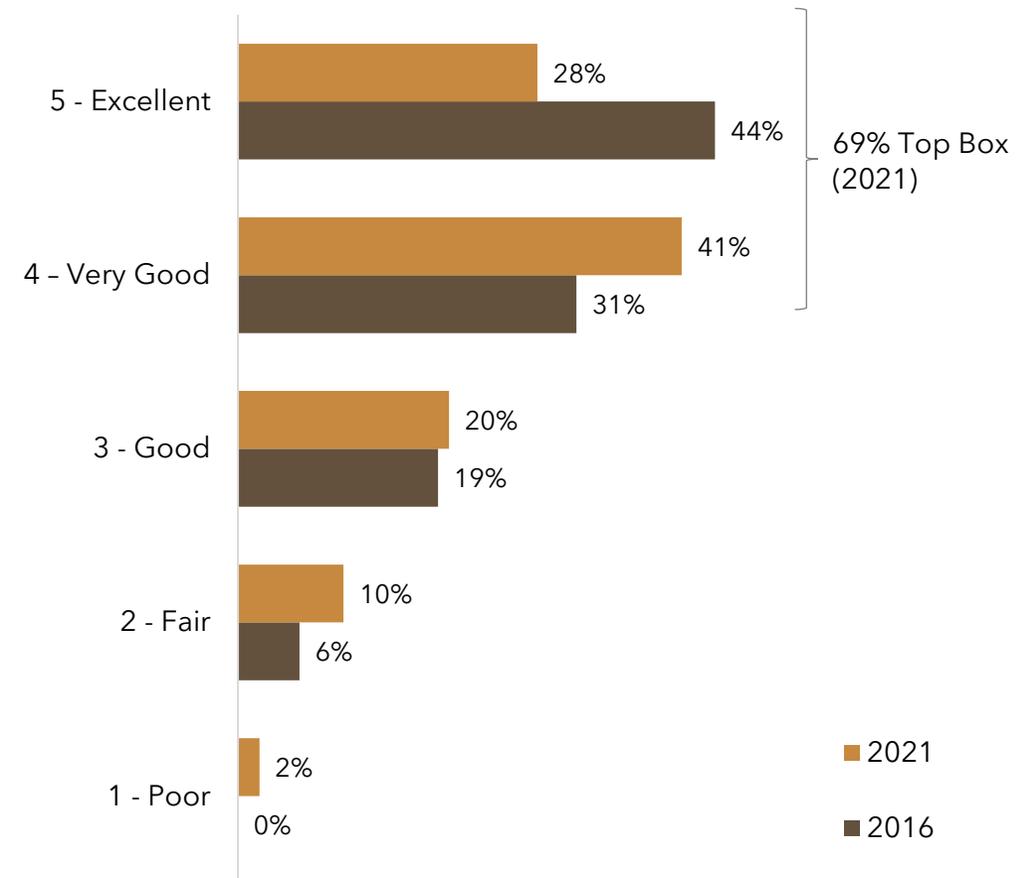
'Consult with environmental groups to alter offerings to protect the environment'

Tourism Golden Overall Business Performance

Stakeholders were asked to rate the overall performance of TG.

- In 2021, 69% of stakeholders rated TG's overall performance as very good or excellent. This is down 6% from 2016 (75%).
- The decline in performance is most likely related due to impacts of the COVID-19 pandemic. See the below quote from a stakeholder.

Tourism Golden Overall Performance
(% of Stakeholders)



'This is probably not the best time to do this survey as tourism is not happening right now and may not be back to where it was a couple years ago, for some time. I don't think any answers will really reflect on the job Tourism Golden is trying to do right now. Sorry. Bad timing.'

Tourism Golden Overall Business Performance

Stakeholders that rated TG's overall performance as less than '5 - Excellent' were asked what TG could do to improve their performance rating.

- 21 stakeholders provided 22 suggestions.
- Comments were summarized into groups about TG's focus, pandemic approach, outreach, sustainability and other (see next two pages for details).

Suggestions about Tourism Golden Focus

'Focus on some of the downtown businesses that are struggling during the closures and restrictions due to the public health crisis. Tourists are still visiting all of the usual shops and restaurants but not aware of the smaller, majorly impacted places that aren't on the usual radar.'

'Help less known establishments and increase the variety of programmes for tourists'

'While I am not a hugely active participant in Tourism Golden's process or activities - I have observed a bit of 'rinse/repeat' methods of marketing and advertising placements over the past several years - I personally think it's time to change things up. Not in terms of messaging, but actual distribution'

'Tourism Golden could do more advocating for what opportunities exist for growth in the area'

'A more balanced approach in terms of catering less to classic hoteliers and there on going poor behaviour and inconsistent product'

'Ensuring that funds that come from MDRT are spent in such a manner that it benefits those who collect/contribute to these funds.'

Tourism Golden Overall Business Performance

Comments about Pandemic Approach

'Tourism Golden has done a great job however I was very disappointed in the push for tourism during the pandemic. I was seeing adverts which encouraged travel during spring break, Christmas, all the main holidays. Writing a little 'please heed govt warning on travel' was simply covering your backs'

'I think telling tourists not to visit BC has had a negative impact on tourism'

'While I am not a hugely active participant in Tourism Golden's process or activities - I have observed a bit of 'rinse/repeat' methods of marketing and advertising placements over the past several years - I personally think it's time to change things up. Not in terms of messaging, but actual distribution'

'Hard to say in this climate as it has been difficult for everyone in the industry. In normal times I would suggest keeping the visitor centre open and staffed all year round to capture more people driving through who are interested in staying in Golden, this could help increase stays and trade in the winter and fringe seasons'

Comments about Sustainability

'Focus more on non-motorized tourism'

'I would rate higher if Tourism Golden worked hard to educate tourists about their impacts on the environment and did not just aim for more people, regardless of how they treat the area'

Tourism Golden Overall Business Performance

Comments about Outreach

'From my perspective, TG does a great(!) job of marketing for the tourism product folks and for driving revenues for those folks. I'm less sure of the collaborative nature of partnering with citizens/other organizations that represent more of a 'quality of life' component. 'A great place to live is a great place to visit' is an old motto of the former Tourism BC going back a couple of decades and re: an earlier question in the survey, I'm not sure if there's more that can be done to celebrate the 'soft' elements of what makes a community attractive to visitors... a welcoming vibe on the streets from the locals'

'Continue to educate the general public (non-tourism) about the long term benefits of tourism for our community and our economy'

'Before I became a business owner, I rarely heard or really knew about Tourism Golden. Maybe working on local 'mini' influencers to push the brand, it might get the awareness out more for locals'

*'After COVID. Host an open house where stakeholders could meet and mingle allowing more networking within the town.
'More pro d for local state holders -Improved balanced social media op for all stakeholders'*

'To be more outreaching to stakeholders on an individual basis'

'Make it easier to access Golden Tourism information pamphlets. Maybe coordinate a package of maps/flyers/info (that we can access at the Visitor Centre) in an 'all in one box'...just come and pick up a box that includes all the documents'

Other Comments

'Not sure, they do really well. Without a larger budget there is not much more they can do'

'Add our business Tourism Golden maps'

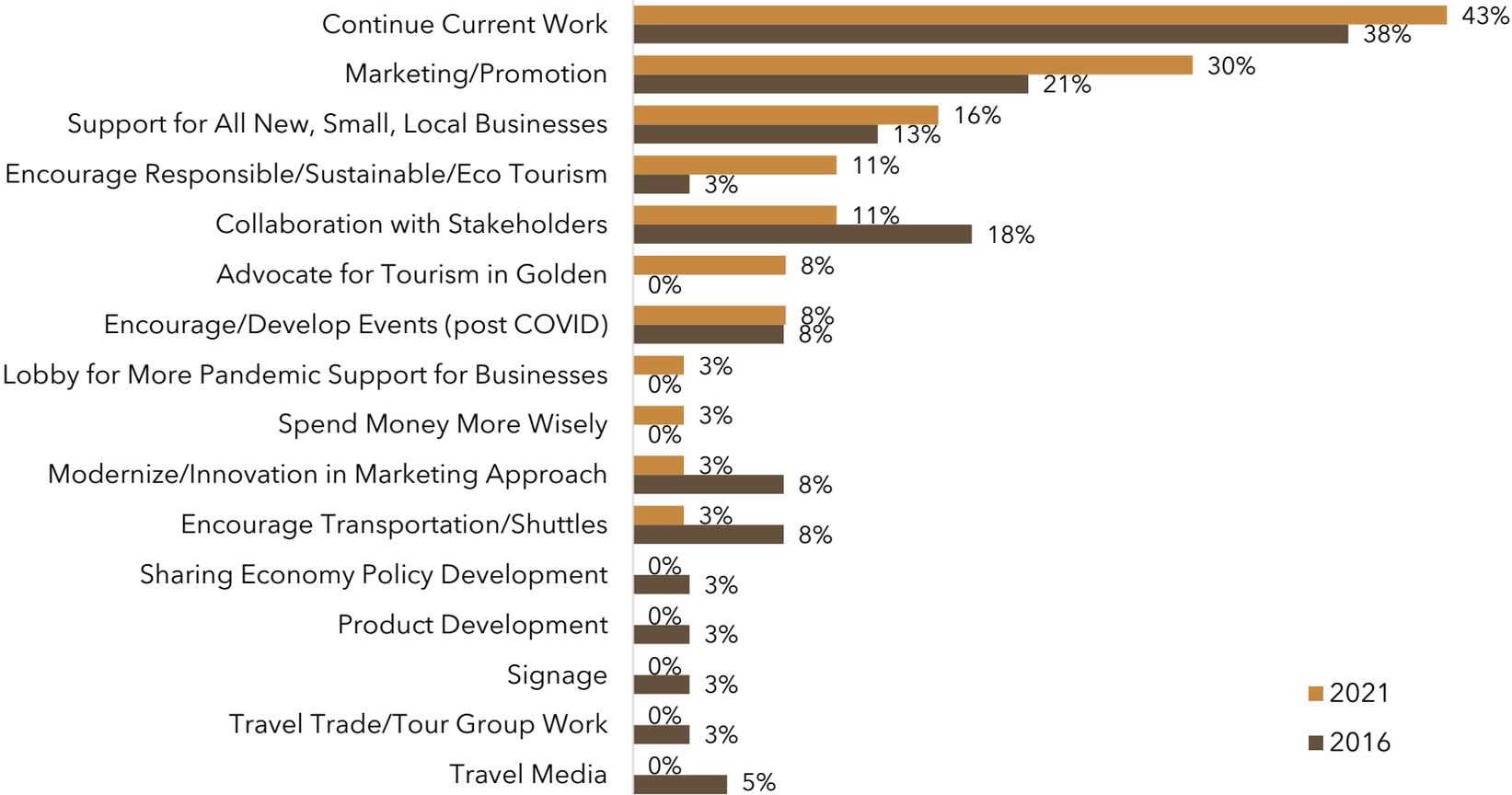
Tourism Golden Important Business Activities

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).

- Almost half (43%) responded TG should continue it's current work.
- A third (30%) suggested enhancing marketing and promotion work, followed by providing support for all new, local and small businesses (16%) and encouraging responsible and sustainable tourism (11%). These all increased from 2016 results.
- Interestingly, compared to 2016, there were declines in the proportion of stakeholders suggesting collaboration with stakeholders, the need to modernize/innovate marketing approach and the need to encourage transportation/shuttles.

Tourism Golden Important Business Activities

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=37. 37 stakeholder provided 51 responses. 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.

Priorities Moving Forward

Tourism Products and Experiences Potential

Stakeholders were asked how much of a potential certain tourism products and experiences had to grow in Golden (see next two pages for detail).

- The top 10 experiences were all related to outdoor products.
- Fewer stakeholders rated culinary tourism, downtown Golden experiences and arts, culture and heritage tourism as strong potential to grow.
- 2021 results matched 2016 where the top 5 activities were backcountry skiing, outdoor adventure sporting events, mountain biking, nordic skiing and hiking. Note that in 2016 visiting national and provincial parks and camping were not asked.

Tourism Products and Experiences Potential

Strong Potential To Grow (Top 11)	Stakeholder Rating	Lower Potential To Grow (Bottom 11)	Stakeholder Rating
1. Backcountry Skiing	93%	12. Fishing	77%
2. Outdoor Adventure Sporting Events in Golden (e.g., events that involve mtn. biking, road biking, trail running)	91%	13. Whitewater Rafting	76%
3. Visiting National and Provincial Parks	91%	14. Music and Mountain/Community Festivals (e.g., Mountain Festival)	76%
4. Hiking	90%	15. Snowmobiling	73%
5. Mountain Biking	89%	16. Tour Groups/Travel Trade	67%
6. Camping	87%	17. Golf	66%
7. Nordic Skiing	84%	18. Guided Tours	63%
8. Downhill Skiing/Snowboarding	80%	19. Sports Tourism (e.g., tournaments, sports team travel)	58%
9. River/Water Experiences other than Whitewater Rafting	79%	20. Culinary Tourism (e.g., local restaurants, food and beverages)	52%
10. Soft Adventure Products (e.g., zip lining)	79%	21. Downtown Golden Experiences	47%
11. Wildlife Viewing and Bird Watching	78%	22. Arts, Culture and Heritage Tourism	40%

How much potential to grow do you think each of the following tourism products and/or experiences have in Golden? Please rate each of the follow program areas on a 1 -5 scale, where 1 = Low Potential and 5 = Strong Growth Potential. n = 44 -47.

Tourism Products and Experiences Potential

Stakeholders were also asked what other products and experiences have a strong potential to grow. 15 responses were provided.

- Skybridge/Suspension Bridge (3 responses)
- Wellness (2 responses)
- Nature Interpretation (2 responses)
- Cycling (2 responses)
- Hunting (1 response)
- Horseback Trail Rides (1 response)
- Paragliding (1 response)
- Restaurants and shopping (1 response)
- E-bike tours (1 response)
- Pet daycare (1 response)

Short and Long Term Barriers to Growth

Stakeholders were also asked about their short and long term barriers to growth. See next two pages for detail.

- The top five short-term barriers to growth were, the Highway 1 construction project, travel restrictions, reconnection to target markets, tourism business survival, and lack of some tourism products like camping and shopping.
- The top five long-term barrier to growth were, the lack of affordable housing, the lack of tourism products, amenities or capacity, poor Highway 1 conditions, long term COVID-19 pandemic impacts and the lack of long-term community planning/zoning.

Short-Term Barriers to Tourism Growth

Short-Term Barriers to Tourism Growth in Golden

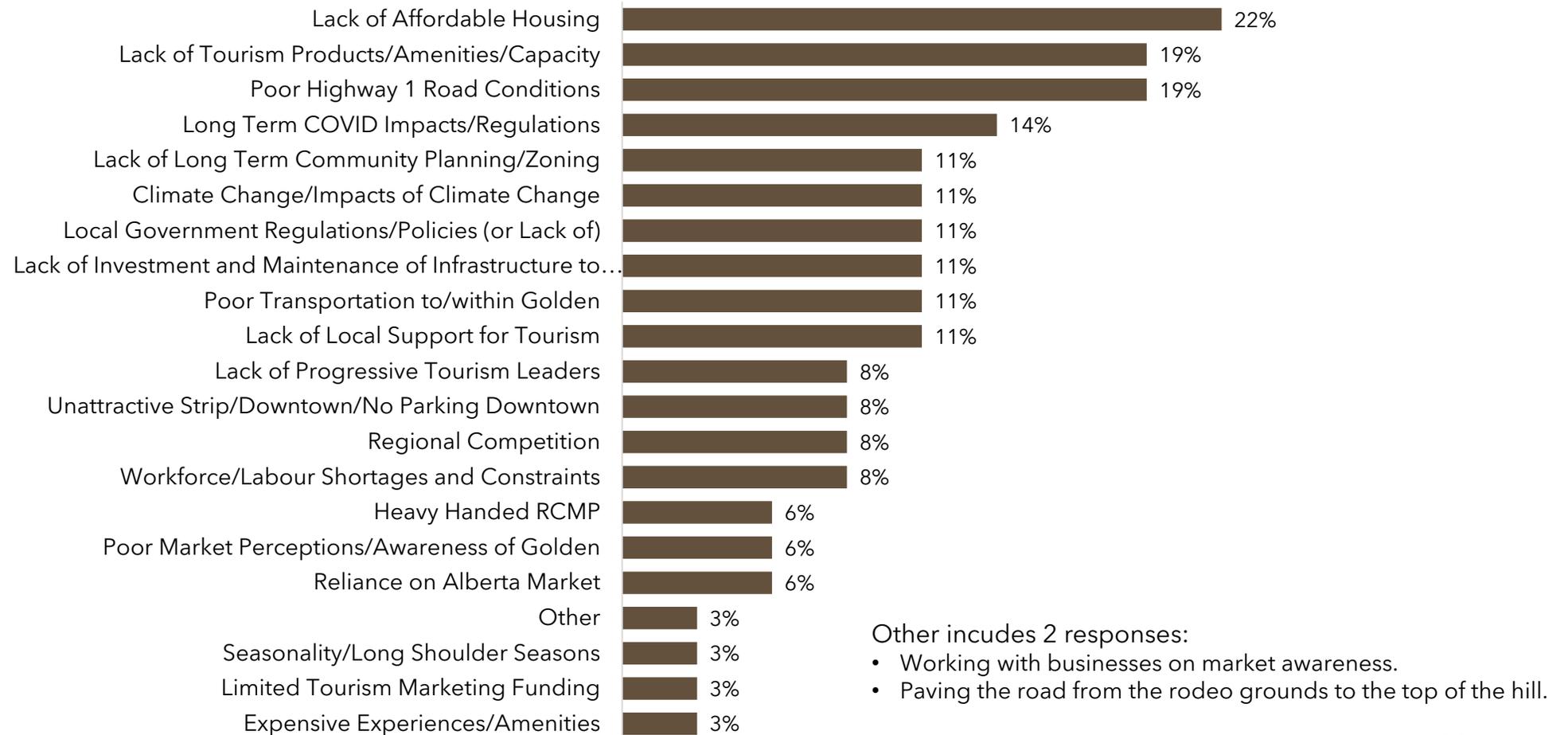
(% of Stakeholders)



In your opinion, what are the top short- and long-term barriers to growth of the tourism industry in Golden? n = 37. 37 stakeholders had 55 responses. The percent totals to more than 100% because stakeholders could provide up to three barriers.

Long-Term Barriers to Growth

Long-Term Barriers to Tourism Growth in Golden (% of Stakeholders)



In your opinion, what are the top short- and long-term barriers to growth of the tourism industry in Golden? n = 36. 36 stakeholders had 73 responses. The percent totals to more than 100% because stakeholders could provide up to three barriers.

Marketing Priorities

Stakeholders were asked how much of a priority TG should place on digital, print or other marketing priorities (see next three pages for details).

- Altogether, the top priorities were digital marketing priorities including the TG website (81%), social media and blog (80%), digital advertising (80%) and image and asset development (80%).
- Stakeholders also responded that travel media relations (70%), printed maps (66%) and digital mapping and map development (65%) and marketing and other research (65%) were top priorities.

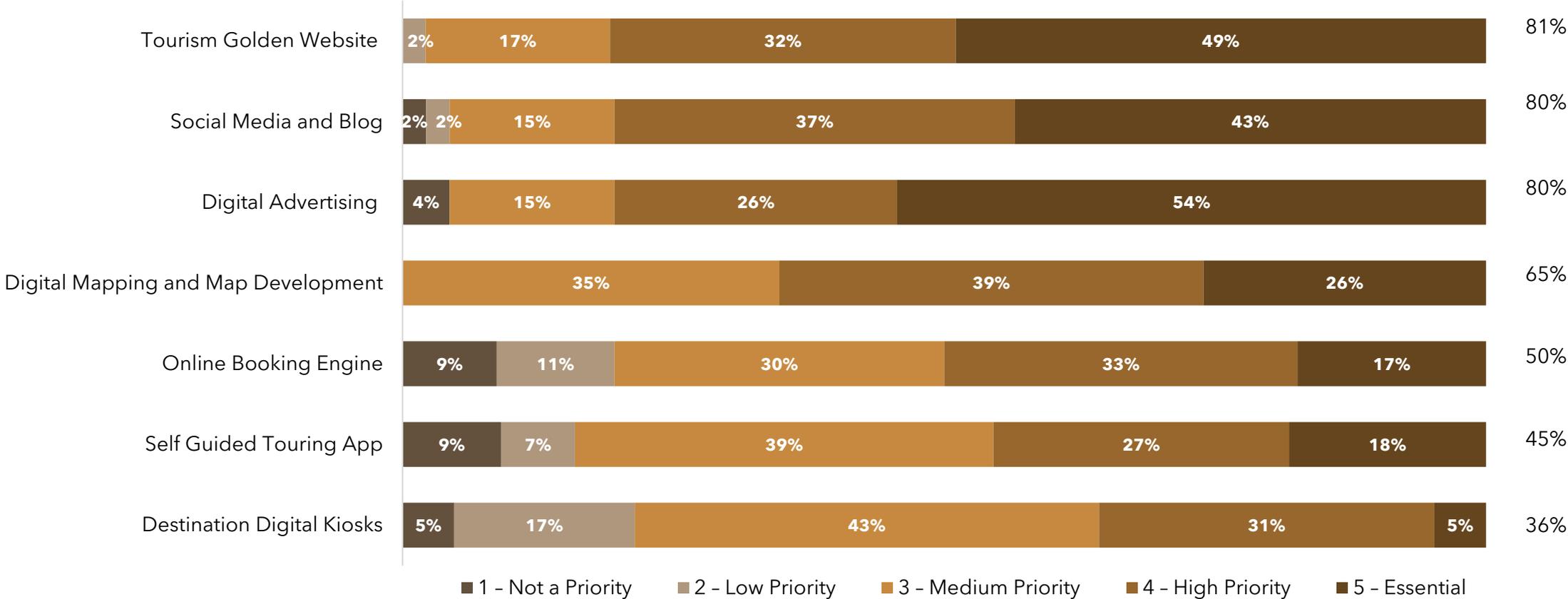
Top 10 Digital, Print or Other Marketing Priorities	Stakeholder Rating (% Top Box)
1. Tourism Golden Website	81%
2. Social Media and Blog	80%
3. Digital Advertising	80%
4. Image and Asset Development (e.g., photos and videos featuring Golden)	80%
5. Travel Media Relations	70%
6. Printed Maps (e.g., outdoor discovery, hiking, biking)	66%
7. Digital Mapping and Map Development	65%
8. Marketing and Other Research	65%
9. Consumer Relations (e.g., monthly consumer news via email, social engagement)	60%
10. Tourism Golden Travel Planner	53%

Digital Marketing Priorities

Digital Marketing Priorities

(% of Stakeholders)

Top Box

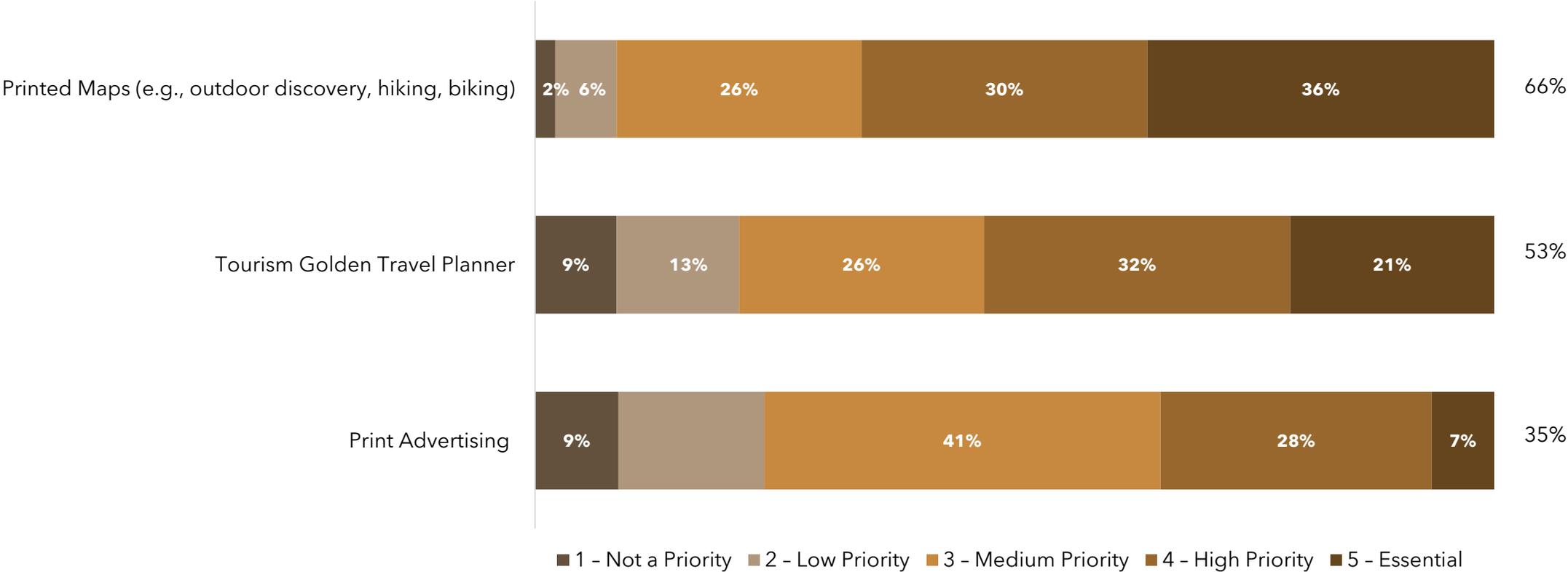


The primary mandate of Tourism Golden is to market and promote Golden and CSRD Area A to visitors. To do so, Tourism Golden considers a wide range of tactical marketing and promotional activities. In your opinion, in the future, how much of a priority should Tourism Golden place on each of the following digital, print or other marketing activities? Please rate each of the following marketing and promotion activities on a 1 -5 scale, where 1 = Not a Priority and 5 = Essential. n = 42 - 47.

Print Marketing Priorities

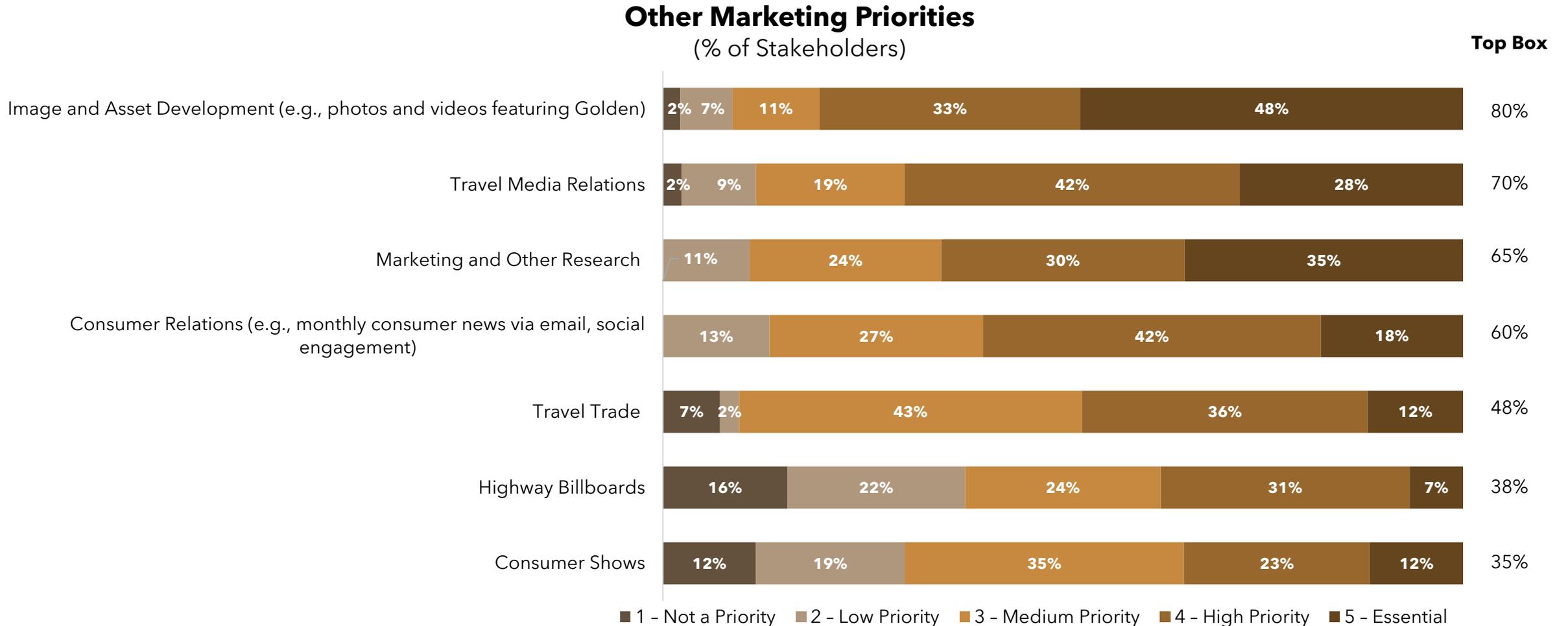
Print Marketing Priorities
(% of Stakeholders)

Top Box



The primary mandate of Tourism Golden is to market and promote Golden and CSRD Area A to visitors. To do so, Tourism Golden considers a wide range of tactical marketing and promotional activities. In your opinion, in the future, how much of a priority should Tourism Golden place on each of the following digital, print or other marketing activities? Please rate each of the following marketing and promotion activities on a 1 -5 scale, where 1 = Not a Priority and 5 = Essential. n = 42 - 47.

Other Marketing Priorities



The primary mandate of Tourism Golden is to market and promote Golden and CSRD Area A to visitors. To do so, Tourism Golden considers a wide range of tactical marketing and promotional activities. In your opinion, in the future, how much of a priority should Tourism Golden place on each of the following digital, print or other marketing activities? Please rate each of the following marketing and promotion activities on a 1 -5 scale, where 1 = Not a Priority and 5 = Essential. n = 42 - 47.

Marketing Priorities

Top box marketing priority scores were compared to 2016 (see the next page for detail).

- Digital marketing priorities were similar for most programs although there was a decline in social media and blogs (2021 - 80%, 2016 - 86%).
- Print marketing priorities increased for print advertising (2021 - 35%, 2016 - 30%) and decreased for the TG Travel planner (2021 - 53%, 2016 - 59%).
- Other marketing priorities increased for highway billboards (2021 - 38%, 2016 - 32%) and decreased for image and asset development (2021 - 80%, 2016 - 86%), travel trade (2021 - 48%, 2016 - 58%), consumer shows (2021 - 35%, 2016 - 49%). Declines in travel trade and consumer shows are most likely due to declines in these marketing activities due to the COVID-19 pandemic.

Marketing Priorities

Digital Marketing Priorities	2021 Top Box	2016 Top Box
Tourism Golden Website	81%	80%
Social Media and Blog	80%	86%
Digital Advertising	80%	76%
Digital Mapping and Map Development	65%	68%
Online Booking Engine	50%	NA
Self Guided Touring App	45%	NA
Destination Digital Kiosks	36%	39%

Print Marketing Priorities	2021 Top Box	2016 Top Box
Printed Maps (e.g., outdoor discovery, hiking, biking)	66%	62%
Tourism Golden Travel Planner	53%	59%
Print Advertising	35%	30%

Other Marketing Priorities	2021 Top Box	2016 Top Box
Image and Asset Development	80%	86%
Travel Media Relations	70%	73%
Marketing and Other Research	65%	NA
Consumer Relations (e.g., monthly consumer news via email, social engagement)	60%	NA
Travel Trade	48%	58%
Highway Billboards	38%	32%
Consumer Shows	35%	49%

NA = Not applicable, not asked in 2021.

Priorities for Activities Outside of Marketing

Stakeholders were asked about priorities outside of marketing (see the next two pages for detail).

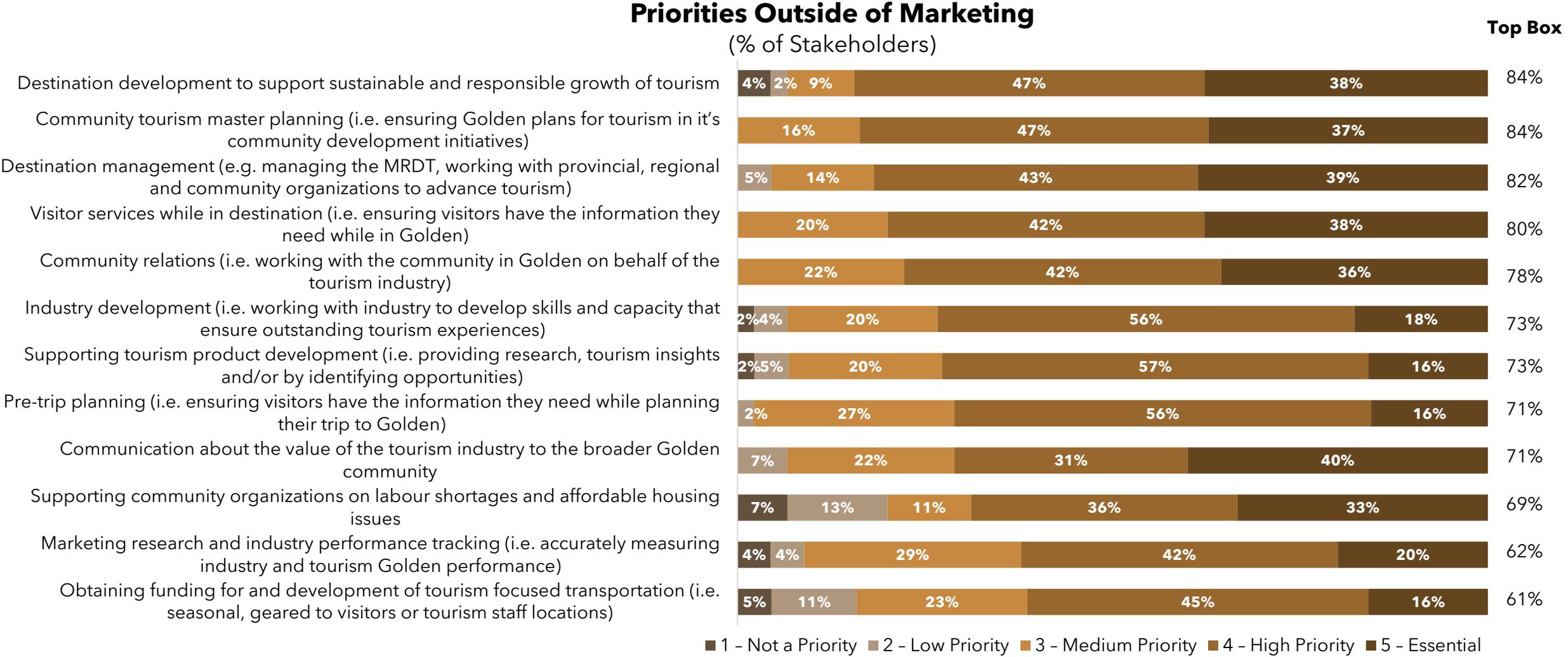
- The top five priorities destination development to support sustainable and responsible growth of tourism (84%), community tourism master planning (84%), destination management (82%), visitor services (80%), community relations (78%).
- Note that communicating the value of tourism to the broader tourism community had the largest proportion of stakeholders that rated it as essential.

Top box priorities for activities outside of marketing were compared to 2016.

- There were 2021 increases in community relations (2021 - 78%, 2016 - 72%), supporting tourism product development (2021 - 73%, 2016 - 66%) and communication about the value of tourism to the broader Golden community (2021 - 70%, 2016 - 58%).
- Declines were noted in marketing research and industry performance tracking (2021 - 62%, 2016 - 76%) and obtaining funding for and development of tourism focused transportation¹ (2021 - 61%, 2016 - 78%).

1. Note that the wording for transportation initiatives was slightly different in 2016, it was Transportation (i.e. communicating tourism perspectives to transportation managers to ensure smooth flow of people to/within Golden) Destination marketing organizations take on a wide range of activities outside of marketing and promotion in order to help grow tourism in communities.

Priorities for Activities Outside of Marketing



Priorities for Activities Outside of Marketing

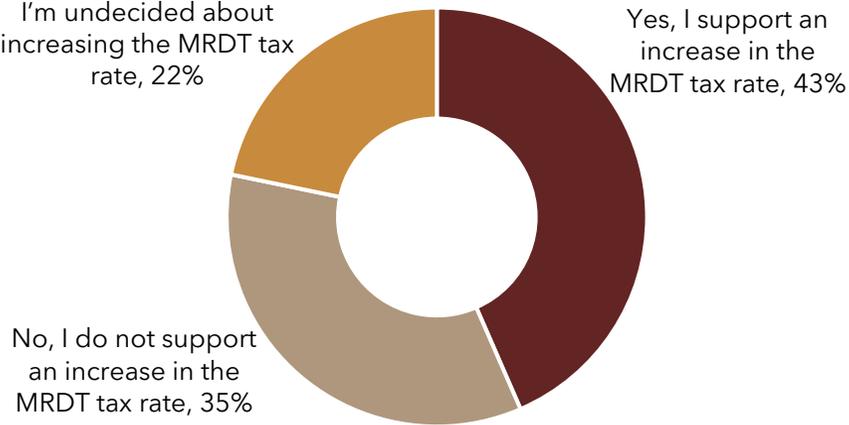
Priorities Outside of Marketing	2021 Top Box	2016 Top Box
Destination development to support sustainable and responsible growth of tourism	84%	NA
Community tourism master planning (i.e., Ensuring golden plans for tourism in it's community development initiatives)	84%	83%
Destination management (e.g., Managing the MRDT, working with provincial, regional and community organizations to advance tourism)	82%	83%
Visitor services while in destination (i.e., Ensuring visitors have the information they need while in golden)	80%	NA
Community relations (i.e., Working with the community in golden on behalf of the tourism industry)	78%	72%
Industry development (i.e., Working with industry to develop skills and capacity that ensure outstanding tourism experiences)	73%	73%
Supporting tourism product development (i.e., Providing research, tourism insights and/or by identifying opportunities)	73%	66%
Pre-trip planning (i.e., Ensuring visitors have the information they need while planning their trip to golden)	71%	NA
Communication about the value of the tourism industry to the broader golden community	71%	58%
Supporting community organizations on labour shortages and affordable housing issues	69%	NA
Marketing research and industry performance tracking (i.e., Accurately measuring industry and tourism golden performance)	62%	76%
Obtaining funding for and development of tourism focused transportation (i.e., Seasonal, geared to visitor or tourism businesses staff locations and scheduling, and could also include airport as well as in-destination services)	61%	75%

Municipal and Regional District (MRDT) Tax Funds

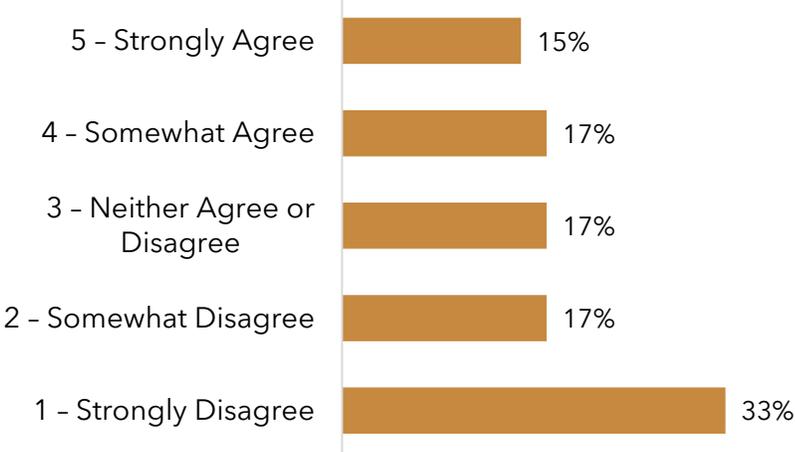
Stakeholders were asked about their support of increasing the MRDT tax rate from 2% to 3% and if they supported use of MRDT funds for affordable housing.

- 43% of stakeholders support an MRDT rate increase while 35% did not support and 22% were unsure.
- Half (50%) of stakeholder disagree while a third (33%) agree while with using MRDT for affordable housing.

Support of Tourism Golden MRDT Tax Rate Increase (% of Stakeholders)



Agreement with Using MRDT Funds for Affordable Housing (% of Stakeholders)



Since 2017, Golden has received 2% of the Municipal and Regional District Tax (MRDT). In 2021, Golden must apply to renew the MRDT. An increase in the tax rate from 2% to 3% is being considered and would result in increased destination marketing, development and programming funds for Tourism Golden. An increase in tax rate would not be implemented before July 2022. Are you in support of increasing the MRDT tax rate from 2% to 3%? n=46. How much do you agree with the following statement about the use of Golden's MRDT funds for affordable housing? n=46. Note that accommodation stakeholders were more likely to respond that they do not support and increase in the MRDT rate (54%). Caution is warranted as sample sizes are small (n=26).

Sustainability Initiatives

Stakeholders were asked to select their top five priorities of 15 sustainability initiatives (see next page for details).

- More than half of stakeholders prioritized increasing shoulder season visitation and enhancing visitor information about responsible tourism.
- Other top five responses were understanding, tracking and managing visitor volume (41%), attracting and retaining tourism labour (33%) and targeting responsible tourists in marketing initiatives (33%).
- Stakeholders mentioned four other sustainability initiatives they would like to see implemented in Golden.

Other Sustainable Tourism Initiatives

'Yes, More education. In the schools with residents and for tourists. All tourists should watch a film on responsible behavior that lowers impacts on the environment. It is irresponsible to encourage people to come here but not educate them. Also, limit the number of tourists coming here based on a sustainable number'

'Wildlife considerate tourism'. No further loss of or infringement on wildlife habitat just for tourism sake'

'Showcasing local businesses to the community to create more awareness of those businesses and their products'

'Making Golden a bit more dog friendly would be awesome. The amount of tourists that spend their day downtown with their pups is incredible. Not having a safe place for them to go or eat while downtown is hindering. Especially in the heat of the summer and they can't leave them in their vehicles. Dog tie up and water stations is a great inviting way to be supportive of safely travelling with your pups'

Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 8)	Stakeholder Rating	Lower Rated Sustainability Initiatives (Bottom 7)	Stakeholder Rating
1. Increasing Shoulder Season Visitation	54%	9. Increasing Visitor Yield (i.e. expenditures per visitor)	26%
2. Enhancing Visitor Information about Responsible Behaviour (e.g., responsible behaviour when visiting local parks, trails, campgrounds, and other outdoor recreation spaces)	54%	10. Affordable Housing Initiatives	26%
3. Understanding, Tracking and Managing Visitor Volume	41%	11. Encouraging Inclusive Tourism Experiences (i.e. everyone can participate in tourism experiences, including and especially those in vulnerable groups)	22%
4. Attracting and Retaining Tourism Labour	33%	12. Enhancing Visitor Information about Backcountry Safety	22%
5. Targeting 'Responsible Tourists' in Marketing Initiatives	33%	13. Working with Golden Tourism Businesses to Reduce Waste and Carbon Emissions	20%
6. Understanding and Tracking Golden Resident Sentiment Towards Tourism	33%	14. Developing and Sharing a Responsible Travel - Visitor Code Of Conduct	20%
7. Encouraging Local Tourism Businesses to Purchase Local Goods, Services and Agriculture Products	28%	15. Enhancing Accessible Tourism Experiences (i.e. people of all abilities have the opportunity to fully participate in tourism experiences)	13%
8. Encouraging New Tourism Product Development is Environmentally Sustainable	28%		

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

Overall Comments

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

- 9 stakeholders had relevant comments.
- 45% (4 responses) of stakeholders responded with 'keep up the good work',
- 22% (2 responses) of stakeholders commented on the proposed increase of the MRDT. Both stakeholders were not in support on increasing the MRDT rate.
- 11% (1 response) of stakeholders suggested diversifying Golden's economy.
- 11% (1 response) of stakeholders commented on shifting some marketing funds to downtown experiences
- 11% (1 response) of stakeholders commented on the ability of Golden to attract responsible tourists.

Overall Comments

'I would like to thank the people for all the hard work and dedication to improving tourism for Golden'

'Keep it up. Keep evolving'

'Keep up the good work'

'Great job overall! Keep it up!'

'My issues with an increase from 2 to 3%: - I compete with other areas for overnight accommodation guests. If they don't have 3%, it makes me less affordable. To say that the new age traveler doesn't look at the tax included price is wrong. They look at the total they will pay and compare. - I don't see why the tourism industry should be singled out to pay for affordable housing. Put a tax on contractors or gas stations or grocery stores or teachers or police officers or someone else to pay for that. - MANY local residents benefit from increased tourism (restaurants, grocery stores, gas stations etc) yet the tax is only leveled against accommodation providers. WHY!?'

'Once the highway construction is complete and the economic downturn of the covid pandemic is complete then maybe consider a 1% increase, but let's keep it 2% for the next 5 years please!'

'Make sure we have a back up plan so that when issues of pandemics or other items that destroy tourism we have some sort of fall back/support when tourism slows down or stops. We can be very vulnerable if we base everything on tourism'

'Golden Tourism does an excellent job with their online presence but too much focuses on outdoor pursuits and although these photos and write ups are beautiful and attractive they continually focus on a certain group that can afford and want these types of experiences. The occasional nod to the downtown businesses, the small walks around town and the curated vibe of the locals trying to make a difference would be appreciated.'

'Golden could attract tourists who are not interested in activities that destroy the environment or have significant impacts. If we present our community as one which highly values nature, we will inspire tourists to follow suit.'

Key Findings and Implications

Key Findings and Implications

2020 was a difficult year for everyone due to the COVID-19 pandemic. TG and tourism businesses in Golden have had to reduce or close business operations, adapt and create new business processes to market and provide Golden tourism experiences. Given the substantial impact on the tourism industry, it is not surprising that some performance scores have declined in 2021 compared to 2016.

TOURISM GOLDEN PERFORMANCE

- The majority (68%) of stakeholders are familiar with TG's programs and services, similar to 2016 results.
- Stakeholders had high awareness levels of TG printed marketing and advertising activities this is due to the fact that these programs have the highest stakeholder participation scores.
- Overall, in 2021, TG received very good - excellent ratings from the great majority (69%) of it's stakeholders. Although this score has declined from 75% in 2016.
 - Similar to 2016, open, honest and frequent communications was a key theme in stakeholder feedback. TG should continue it's efforts to engage and communicate with all (new, old, big, small) stakeholders. A relatively new component of communications and engagement is with Golden locals. Local resident engagement needed in order to ensure the tourism industry continues to have social license throughout the community.

Key Findings and Implications

TOURISM GOLDEN PERFORMANCE CONT.

- In addition, in 2021, stakeholders had low scores for encouraging day visitors/passing traffic to stay longer and return later as an overnight visitor, as well as increasing shoulder season visitation and revenues.

PRIORITIES MOVING FORWARD

- Similar to 2016, stakeholders identified that outdoor activity/adventure events have the most potential for future growth. This indicates that TG's current brand essence, Authentic Outdoors is supported by stakeholders.
- Stakeholders ranked top marketing priorities as digital initiatives including the TG website, social media and blog, digital advertising and image and asset development.
- 2021 priority initiatives outside of marketing suggest stakeholders support initiatives that encourage responsible tourism. Also, there is emerging support for enhanced tourism/community/tourism master planning and destination management. Stakeholders suggested community relations, tourism product development and communication about the value of tourism were higher priorities compared to 2016.

Key Findings and Implications

PRIORITIES MOVING FORWARD CONT.

- Just under half of stakeholders support an increase in the MRDT rate, while 35% did not support and 22% were unsure. 50% of stakeholder disagree with using MRDT funds for affordable housing initiatives. Support for the MRDT rate increase is likely linked to the on-going substantial impacts of the COVID-19 pandemic.

SUSTAINABILITY INITIATIVES

- Increasing shoulder season visitation and providing responsible tourism information to visitors were the top stakeholder-rated sustainability priorities. This is followed by measuring and understanding visitor volume, attracting and retaining tourism labour and targeting responsible tourists.

RESEARCH APPROACH

- There was a decline in the response rate to this stakeholder survey compared to 2016. The decline in response rate is most likely due to series of factors including:
 - A larger initial stakeholder list,
 - Pandemic fatigue, including a recent no-travel order, and
 - The multitude of surveys that have been distributed to tourism business in 2020 and 2021 measuring impacts of the COVID-19 pandemic.

Key Findings and Implications

RESEARCH APPROACH CONT.

- TG should evaluate the value of conducting stakeholder surveys on an annual basis. Given the last survey was in 2016, it is difficult to assess if evaluation score changes are a result of performance or a result of impacts of the pandemic.
- Responses only represent those that responded to the survey. Stakeholders that did not respond were most likely less familiar with TG and its activities. Accommodation and community partner stakeholders had a stronger response than activity/attraction and food and beverage, retail or tourism service stakeholders. There is an opportunity to enhance engagement with stakeholders that had a lower response to improve future response rates.

APPENDIX - Questionnaire

Tourism Golden's 2021 Stakeholder Survey

First, a few questions about the organization of Tourism Golden.

Overall, how familiar is your organization with the services and programs offered by Tourism Golden?

Please rate on a scale of 1 = Not Familiar At All and 5 = Very Familiar.*

	1 - Not Familiar at All	2 - Not Very Familiar	3 - Somewhat Familiar	4 - Familiar	5 - Very Familiar
Familiarity with Tourism Golden	{}	{}	{}	{}	{}

On a scale of 1-5, where 1 - Not at all aware and 5 - Extremely aware, how aware are you of the following 10 marketing activities that Tourism Golden has implemented over the past 5 years?

Please rate each on a scale where 1 = Not Aware at All and 5 = Very Aware.*

	1 -Not Aware at All	2 -Slightly Aware	3 - Somewhat Aware	4 - Aware	5 - Very Aware	Don't Know
Coordination with Regional, Sector and Provincial Marketing Activities	{}	{}	{}	{}	{}	{}
Media Relations (e.g., hosting travel media and social influencers)	{}	{}	{}	{}	{}	{}
Content and Asset Creation (e.g., mtn. Biking, fishing and <u>locals</u> lowdown videos and user-generated content generation)	{}	{}	{}	{}	{}	{}
Paid Digital, Social and Google Search Advertising	{}	{}	{}	{}	{}	{}
Paid Print Advertising (e.g., Experience Mtn. Parks, Explore, and Ski Canada magazines)	{}	{}	{}	{}	{}	{}
Consumer Relations and Show Attendance	{}	{}	{}	{}	{}	{}

	1 -Not Aware at All	2 -Slightly Aware	3 - Somewhat Aware	4 - Aware	5 - Very Aware	Don't Know
Event Support (e.g., Freeride World Tour, Golden 24)	{}	{}	{}	{}	{}	{}
Annual Publications (e.g., Golden Travel Planner, Hiking, Biking and Outdoor Discovery maps)	{}	{}	{}	{}	{}	{}
Other Marketing Collateral Generation (e.g., French, German and Chinese language conversion of website)	{}	{}	{}	{}	{}	{}
Marketing & other research	{}	{}	{}	{}	{}	{}

Over the past three years (2017-2020), what Tourism Golden programs have you participated in?

Please select all that apply or 'None'.

*

- 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., Golden Travel Planner, hiking and biking maps)
- Subsidized Co-Op 3rd Party Collateral Development (e.g., Experience Mountain Parks, Explore, Mountain Sledder magazines)
- In-Person Gathering in the Past 3 Years (e.g., annual general meeting, stakeholder gatherings, strategic planning session)
- Brochure Racking or Other Advertising at the Golden Visitor Centre
- None

In Tourism Golden's 2017-2021 strategic plan, there were 12 strategic objectives that have directly impacted the tourism industry. How would you rate Tourism Golden's performance on each of those 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 Target Market Awareness Of Golden as a Great Destination To Visit	()	()	()	()	()	()
Establish Perceptions of Golden Consistent With Our Brand Positioning - Brand Positioning is Known and Embraced By Target Markets and Local Residents	()	()	()	()	()	()
Encourage Target Visitors to Make Golden A Positive Choice of Destination in Their Vacation	()	()	()	()	()	()
Encourage Day Visitors/Passing Traffic to Stay Longer And Return Later as an Overnight Visitor	()	()	()	()	()	()
Increase Length of Stay	()	()	()	()	()	()
Increase Number of Overnight Visitors	()	()	()	()	()	()
Encourage Repeat Visitation	()	()	()	()	()	()
Increase Shoulder Season Visitation and Revenues	()	()	()	()	()	()
Establish a Baseline and Show Annual Improvements in Net Promoter Score	()	()	()	()	()	()
Increase Funding for Tourism Golden	()	()	()	()	()	()
Maintain Position as Lead Organization in Tourism and Continuously Learn And Improve	()	()	()	()	()	()
Build Strong Stakeholder and Local Support for Tourism Golden for the Overall Importance Of The Tourism Industry.	()	()	()	()	()	()

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
Has Open, Honest and Frequent Communication with Tourism Stakeholders	()	()	()	()	()	()
Advocates for Tourism in Golden and the Region	()	()	()	()	()	()
Forms Partnerships with Relevant Organizations in Order to Advance Tourism Marketing And Destination Development	()	()	()	()	()	()
Is Transparent About its Performance	()	()	()	()	()	()
Spends Funds Wisely and Responsibly	()	()	()	()	()	()
Collaborates and Consults with the Tourism Industry on Key Decisions	()	()	()	()	()	()
Is Focused on Markets That Align with the Needs Of The Tourism Industry In Golden	()	()	()	()	()	()
Maintains a Positive Relationship with the Residents Of Golden and Kicking Horse Country	()	()	()	()	()	()
Provides Effective Leadership to the Tourism Industry In Golden and Kicking Horse Country	()	()	()	()	()	()
Advocates a Social, Environmental and Economic Balance within the Tourism Industry and Community at Large	()	()	()	()	()	()

If communication is poor or fair, What could Tourism Golden do to improve your rating on communication?

Fill in your response.

Taking everything into account, how would you rate the overall performance of Tourism Golden?

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

	1 - Poor	2 - Fair	3 - Good	4 - Very Good	5 - Excellent	Don't Know
Overall Performance of Tourism Golden	()	()	()	()	()	()

If overall performance is less than '5 - Excellent' What could Tourism Golden do to improve your performance rating?

Fill in your response.

In your opinion, what is the most important thing Tourism Golden could do to support the tourism industry in Golden?

Fill in your response.

In your opinion, what are the top short- and long-term barriers to growth of the tourism industry in Golden?

Fill in up to three barriers each.

	Short Term Barriers (Related to getting over the COVID-19 pandemic)	Long Term Barriers (Related to longer-term tourism marketing and development)
1.	_____	_____
2.	_____	_____
3.	_____	_____

How much potential to grow do you think each of the following tourism products and/or experiences have in Golden?

Please rate each of the follow program areas on a 1 -5 scale, where 1 = Low Potential and 5 = Strong Growth Potential.*



	1 -Low Potential To Grow	2	3 -Some Potential	4	5 -Strong Growth Potential	Don't Know
Sports Tourism (e.g., tournaments, sports team travel)	()	()	()	()	()	()
Tour Groups/Travel Trade	()	()	()	()	()	()
Culinary Tourism (e.g., local restaurants, food and beverages)	()	()	()	()	()	()
Arts, Culture and Heritage Tourism	()	()	()	()	()	()
Snowmobiling	()	()	()	()	()	()
Downtown Golden Experiences	()	()	()	()	()	()
Downhill Skiing/Snowboarding	()	()	()	()	()	()
Hiking	()	()	()	()	()	()
Mountain Biking	()	()	()	()	()	()
Whitewater Rafting	()	()	()	()	()	()
River/Water Experiences other than Whitewater Rafting	()	()	()	()	()	()
Golf	()	()	()	()	()	()
Nordic Skiing	()	()	()	()	()	()
Fishing	()	()	()	()	()	()
Backcountry Skiing	()	()	()	()	()	()
Outdoor Adventure Sporting Events in Golden (e.g., events that involve mtn. biking, road biking, trail running etc.)	()	()	()	()	()	()
Music and Mountain/Community Festivals (e.g., Mountain Festival)	()	()	()	()	()	()
Wildlife Viewing and Bird Watching	()	()	()	()	()	()
Visiting National and Provincial Parks	()	()	()	()	()	()

	1 -Low Potential To Grow	2	3 -Some Potential	4	5 -Strong Growth Potential	Don't Know
Soft Adventure Products (e.g., zip lining)	()	()	()	()	()	()
Guided Tours	()	()	()	()	()	()
Camping	()	()	()	()	()	()

Are there other (than those listed above) products and/or tourism experiences you think will have a strong potential to grow in Golden?

Fill in your response.

The primary mandate of Tourism Golden is to market and promote Golden and CSRD Area A to visitors. To do so, Tourism Golden considers a wide range of tactical marketing and promotional activities.

In your opinion, in the future, how much of a priority should Tourism Golden place on each of the following digital, print or other marketing activities?

Please rate each of the following marketing and promotion activities on a 1 -5 scale, where 1 = Not a Priority and 5 = Essential.

A. DIGITAL MARKETING*

	1 - Not a Priority	2 - Low Priority	3 - Medium Priority	4 - High Priority	5 - Essential	Don't Know
Tourism Golden Website	()	()	()	()	()	()
Social Media and Blog	()	()	()	()	()	()
Self Guided Touring App	()	()	()	()	()	()
Digital Mapping and Map Development	()	()	()	()	()	()
Digital Advertising	()	()	()	()	()	()
Destination Digital Kiosks	()	()	()	()	()	()
Online Booking Engine	()	()	()	()	()	()

B. PRINT MARKETING*

	1 - Not a Priority	2 - Low Priority	3 - Medium Priority	4 - High Priority	5 - Essential	Don't Know
Tourism Golden Travel Planner	()	()	()	()	()	()
Printed Maps (e.g., outdoor discovery, hiking, biking)	()	()	()	()	()	()
Print Advertising	()	()	()	()	()	()

C. OTHER MARKETING ACTIVITIES*

	1 - Not a Priority	2 - Low Priority	3 - Medium Priority	4 - High Priority	5 - Essential	Don't Know
Highway Billboards	()	()	()	()	()	()
Consumer Relations (e.g., monthly consumer news via email, social engagement)	()	()	()	()	()	()
Consumer Shows	()	()	()	()	()	()
Travel Trade	()	()	()	()	()	()
Travel Media Relations	()	()	()	()	()	()
Image and Asset Development (e.g., photos and videos featuring Golden)	()	()	()	()	()	()
Marketing and Other Research	()	()	()	()	()	()

Destination marketing organizations take on a wide range of activities outside of marketing and promotion in order to help grow tourism in communities. As described earlier, this survey will be used to assist in Tourism Golden's strategic planning. In your opinion, how much of a priority should Tourism Golden place on each of the following program areas?

Please rate each of the following program areas on a 1 -5 scale, where 1 = Not a Priority and 5 = Essential. *

	1 - Not a Priority	2 - Low Priority	3 - Medium Priority	4 - High Priority	5 - Essential	Don't Know
Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	()	()	()	()	()	()
Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding tourism experiences)	()	()	()	()	()	()
Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	()	()	()	()	()	()
Visitor services while in destination (i.e. ensuring visitors have the information they need while in Golden)	()	()	()	()	()	()
Obtaining funding for and development of tourism focused transportation (i.e. seasonal, geared to visitor or tourism businesses staff locations and scheduling, and could also include airport as well as in-destination services)	()	()	()	()	()	()
Community relations (i.e. working with the community in Golden on behalf of the tourism industry)	()	()	()	()	()	()
Marketing research and industry performance tracking (i.e. accurately measuring industry and tourism Golden performance)	()	()	()	()	()	()
Community tourism master planning (i.e. ensuring Golden plans for tourism in it's community development initiatives)	()	()	()	()	()	()

	1 - Not a Priority	2 - Low Priority	3 - Medium Priority	4 - High Priority	5 - Essential	Don't Know
Destination management (i.e. managing the MRDT, working with provincial, regional and community organizations to advance tourism)	()	()	()	()	()	()
Destination development to support sustainable and responsible growth of tourism	()	()	()	()	()	()
Communication about the value of the tourism industry to the broader Golden community	()	()	()	()	()	()
Supporting community organizations on labour shortages and affordable housing issues	()	()	()	()	()	()

The MRDT was introduced in 1987, by the Provincial Government, to provide funding for local tourism marketing, programs, and projects. The tax is intended to help grow BC revenues, visitation, and jobs, and amplify BC's tourism marketing efforts in an increasingly competitive marketplace. The MRDT is an up-to 3% tax applied to sales of short-term accommodation provided in participating areas of British Columbia on behalf of municipalities, regional districts and eligible entities. Eligible use of MRDT funds are tourism marketing, programs and projects, initiatives respecting affordable housing, and any other prescribed purposes as set out in the regulation. Click here for more information about the MRDT.

Since 2017, Golden has received 2% of the Municipal and Regional District Tax (MRDT). In 2021, Golden must apply to renew the MRDT. An increase in the tax rate from 2% to 3% is being considered and would result in increased destination marketing, development and programing funds for Tourism Golden. An increase in tax rate would not be implemented before July 2022..

Are you in support of increasing the MRDT tax rate from 2% to 3%?*

- () Yes, I support an increase in the MRDT tax [rate](#)
 () No, I do not support an increase in the MRDT tax [rate](#)
 () I'm undecided about increasing the MRDT tax [rate](#)

How much do you agree with the following statements about the use of Golden's MRDT funds for affordable housing and local transportation initiatives?

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

	1 - Strongly Disagree	2 - Somewhat Disagree	3 - Neither Agree or Disagree	4 - Somewhat Agree	5 - Strongly Agree	Don't Know

I support the use of Golden MRDT revenues for affordable housing initiatives.	()	()	()	()	()	()
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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 about Responsible Behaviour (e.g., responsible behaviour when visiting local parks, trails, campgrounds, and other outdoor recreation spaces).
- Enhancing Visitor Information about Backcountry Safety
- Targeting 'Responsible Tourists' in Marketing Initiatives
- Developing And Sharing A Responsible Travel - Visitor Code Of Conduct
- Understanding, Tracking and Managing Visitor Volume
- Working with Golden Tourism Businesses to Reduce Waste and Carbon Emissions
- Encouraging Local Tourism Businesses to Purchase Local Goods, Services and Agriculture Products
- Encouraging New Tourism Product Development 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 (than those listed above) sustainable tourism initiatives that you would like to see implemented in Golden?

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

Thank You!



For more information contact:

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