Golden Visitors

Winter 2017 Visitor Survey Results – FINAL Report

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TOURISM
Golden
GOLDEN RULES

///ALIGN
CONSULTING
RESEARCH•STRATEGY•EVALUATION

EXECUTIVE SUMMARY

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. TG's 2017 marketing plan outlines a marketing research strategy that states, *We will gather research data from TG stakeholders and visitors on visitor demographic, lifestyle, travel habits and perceptions of Golden.*

This report summarizes results from the 2017 winter visitor study conducted to fulfill the above research strategy. Similar to 2016, a two-stage, multi-location survey design was used to collect information about winter visitors. The 2017 questionnaire matched the 2016 questionnaire.

- Between February 2 and April 2, 2017 researchers conducted 655 full intercept interviews with visitors.
- A total of 387 visitors agreed to participate in the follow-up questionnaire, of those, of 164 visitors actually completed the online follow-up survey for a response rate of 42%.

Key Findings

- The majority of winter visitors were from Alberta, BC and other provinces in Canada. These findings matched winter 2016 results and 2017 marketing plan target markets.
- On average, travel parties spent $1,481 while in Golden which was up 22% over 2016 results.
- There is evidence that there has been progress in increasing target market awareness and visitor length of stay, which are two of TG key marketing objectives. When compared to 2016, there was a longer length of overnight stay, increased awareness of Golden, a higher proportion of visitors choosing Golden as a primary destination and fewer visitors that considered other destinations when planning their vacations.

- With the rise of the sharing economy, the use of private home rental services (e.g. Airbnb, VRBO) continues to grow as an important accommodation booking source with 16% of responses compared to just 8% in winter 2016.
- The majority of visitors were in Golden for resort skiing/snowboarding at KHMR. Golden winter visitors rated their overall experience as good-excellent (91%) and the majority were very likely to return (87%).
  - Golden's Net Promoter Score (NPS) was 45.9[1].
  - A good skiing experience at KHMR, the great atmosphere in town and proximity to a visitor's home were important factors to achieving a good winter experience in Golden.
  - Characteristics of visitors likely to recommend Golden differed from visitors not likely to recommend Golden (see section 3.8 for a summary of differences).
- A warm welcome by Golden's residents continues to be essential in provision of a good visitor experience. Friendly, hospitable people, and helpful front-line staff are gaining importance in decision-making factors to come to Golden. In addition, second to their mobile devices, visitors prefer word of mouth visitor information services.

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[1] The Net Promoter Score uses visitor's likelihood of recommending Golden as proxy measure of experience evaluation, see Section 2.2.1. for more information. Net Promoter, NPS and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

GOLDEN - WINTER 2017 SUMMARY

Market Origin

- BC
- USA
- Overseas
- Other Canada
- Alberta

49% | 10% | 10% | 13% | 18%
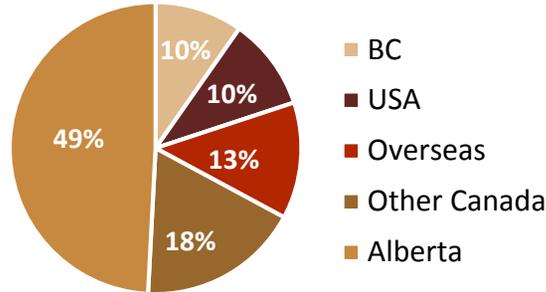
Top Provinces (outside BC & AB)

1. Ontario 2. Quebec 3. Manitoba 4. Saskatchewan

Top 3 USA States
1. Washington
2. California
3. Utah

Top Overseas Regions
1. Europe – UK, Germany
2. Australia/New Zealand
3. Other Countries

$1,481 on average, was spent in Golden by each visitor party

Visitors

61% male

39% female

4.1 people in each visitor party
43% travelled with friends
36% travelled with spouse
15% travelled with children (<16)

72% had a university or post graduate degree

**63%** had HH income of $100,000+

Golden Length of Stay

Day — 11%

Overnight — 89%

Average Stay = **3.2** Nights

Type of Trip

Repeat Visitor	57%
First Trip	43%
Golden is Primary Destination	68%
Touring Trip	22%
Another Primary Destination	10%
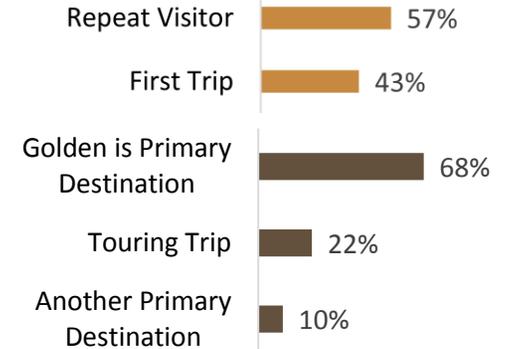
44% Considered Other Winter Destinations
Like: Revelstoke, Banff/Canmore & Fernie
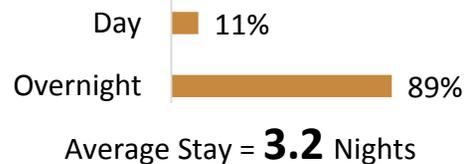
Top 5 Places Visited in Golden
1. Restaurant
2. Pub/Bar
3. Gas Station
4. Kicking Horse Mountain Resort
5. Grocery Store

82% visited downtown

Accommodations

82% Stayed at Paid Roofed Accommodation
93% Pre-Booked Accommodation

Booking Method
- Accommodation Property
- Online Travel Agent
- Private Home Rental (e.g. Airbnb)
- Other

52% | 23% | 16% | 10%
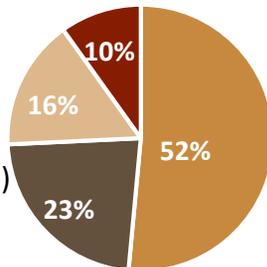
Top 5 Reasons for Visiting Golden
1. Resort Skiing/Snowboarding (72%)
2. Visiting Friends and Relatives (5%)
3. Education/Medical (4%)
4. Cross Country Skiing (3%)
5. Backcountry Skiing (3%)

79% of first time visitors were aware of Golden before visiting

Experience Evaluation

91% Rated Their Overall Golden Experience as Very Good/Excellent

Likelihood to Recommend: **58%**

Net Promoter Score (NPS): **45.9**

Likelihood of Return to Golden: **87%**

Winter Visitors	2017	2016	2017/2016 % Change	Directional Change
Primary Market				
BC	10%	10%	0%	=
AB	49%	50%	-2%	↓
Other Canada	18%	20%	-10%	↓
USA	10%	9%	11%	↑
Overseas	13%	11%	18%	↑
Gender				
Female	39%	39%	0%	=
Male	61%	61%	0%	=
Length of Stay				
Day Visitors	11%	15%	-27%	↓
Overnight Visitors	89%	85%	5%	↑
Average Nights in Golden	3.2	3.0	7%	↑
Aware of Golden Before First Visit[1]	79%	72%	10%	↑
Type of Trip				
Percent Choosing Golden as Primary Destination	68%	61%	11%	↑
First Time Visitors	43%	35%	23%	↑
Repeat Visitors	57%	65%	-12%	↓
Considered Other Destinations	44%	47%	-6%	↓
Visitor Party Expenditures While in Golden	$1,481	$1,216	22%	↑
Accommodation				
Stayed at Paid Roofed Accommodation	82%	86%	-4%	↓
Pre-Booked Accommodation	93%	93%	0%	=
Booked with Private Home Rental (e.g. Airbnb)	16%	8%	100%	↑
Experience Evaluation				
Overall Excellent/Very Good Experience Rating[2]	91%	92%	-1%	↓
High Likelihood of Return Trip to Golden[2]	87%	88%	-1%	↓
High Likelihood of Recommending Golden	58%	58%	0%	=
NPS	45.9	49.9	-5 pts	↓

1. Of First Time Visitors.   2. Top Box Responses.

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Front Cover Photo Credit: Tourism Golden

1.0. INTRODUCTION

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. The not-for-profit organization's vision is, *To inspire target visitors to explore and experience Golden.* To realize the vision, in 2017, TG will continue to focus on three key strategic objectives:[2]

- Establish perceptions of Golden consistent with our brand positioning,
- Increase target market awareness of Golden as a great destination to visit, and
- Increase nightly visit sand length of stay.

The 2017 TG marketing plan has a research strategy that states, *We will gather research data from TG stakeholders and visitors on visitor demographic, lifestyle, travel habits and perceptions of Golden. These will be used to identify and measure trends and motivations for future marketing planning and strategies, and will provide metrics against which the Strategic Objectives will be measured.* The research strategy goals are to:

- Produce visitor data research reports for use by Tourism Golden and community stakeholders,
- Provide analysis of annual and seasonal data,
- Provide a capacity with which to evaluate the effectiveness and to demonstrate the success of marketing activity,
- Identify and evaluate Net Promoter Score, and
- Measure the economic impact of tourism in Golden.

To fulfill the research strategy and goals, TG has conducted visitor surveys in 2013, 2014, 2015, 2016 and now 2017. In fall 2015, Align Consulting was hired to reduce TG staff workloads and provide professional marketing research services throughout 2016 and 2017. 2017 marks the second consecutive year with a similar visitor survey approach which allows for year-over-year comparisons. Two visitor surveys are planned for 2017, one for the winter season (this report) and another for the peak summer season.

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[2] Tourism Golden Marketing Plan 2017 FY.

2.0. METHODOLOGY

2.1. Data Collection

Similar to 2016 research, a two-stage, multi-location survey design was used to collect information about Golden visitors. The first stage was an on-site interview, the second was on online follow-up survey. Questionnaires were jointly designed by Align Consulting and Tourism Golden and were consistent with 2016 research.

TG employed three paid researchers to conduct on-site interviews in the winter of 2017. The researchers worked for 28 days between February 2 and April 2, 2017. They approached visitors at a variety of locations around Golden, including 3 hotels along Highway 1, downtown Golden, Kicking Horse Mountain Resort (KHMR) and the Nordic Centre near KHMR. The on-site interview was 5-7 minutes long and finished with the request to participate in an online follow-up survey.

A total of 1,313 people were approached to participate in the on-site survey. Of those, 1,103 people (84%) agreed to participate, 448 were screened out because they were locals, vacation home property owners, staying in Golden for longer than 30 days, under 19 or had already completed the survey. A total of 387 visitors agreed to complete the online, follow-up survey. The follow-up survey was distributed via email within one week of completing the on-site interviews, also $200 VISA gift card was offered as an incentive to complete the follow-up survey. Of the 387, 42 could not be delivered, equaling 374 people that actually received the follow-up email. Two email reminders were sent over several weeks to those people who had not started or completed the survey. A total of 164 visitors completed the online survey for a response rate of 42%[3].

By location, response to the follow-up survey was highest for visitors encountered at the Nordic Centre (66%), followed by KHMR (42%), the hotels on Highway 1 (37%) and in downtown Golden (34%). By market, visitors from drive markets had good response rates between 44% and 47% while there was fair response rate from American (29%) and overseas (33%) visitors.

A combination of a reduction of budget allocated to researcher staffing combined with staffing challenges resulted in fewer completed intercept and follow-up surveys compared to 2016 (2017 - 655 intercept surveys and 164 follow-up surveys; 2016 – 1,048 intercept surveys and 262 follow-up surveys). The reduced number of completed survey did not allow for full market origin analysis of the follow-up survey responses. In 2017, intercept interviews were not conducted at the Quartz Creek trailhead, this resulted in a larger proportion of intercept interviews completed at KHMR compared to 2016. In addition, in 2017, there were fewer follow up survey responses from visitors interviewed at the Highway 1 corridor and downtown Golden compared to 2016. This has resulted in a larger percentage of follow-up responses from visitors interviewed at KHMR and the Nordic Centre.

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[3] 42% (164/387) is considered a good response rate.

Location	People Approached	Agree to Complete Survey	Number of:				
			Not in Population/Did Not Complete[1]	Completed On-Site Survey	Agree to Follow-Up	Completed Follow-Up	Response Rate
KHMR	840	752	268	484	286	119	42%
Nordic Centre	109	103	65	38	29	19	66%
Highway 1 Corridor	209	109	19	90	43	16	37%
Downtown Golden	155	139	96	43	29	10	34%
Total	**1,313**	**1,103**	**448**	**655**	**387**	**164**	**42%**

1. Not in population means the person approached was less than 19 years old, already surveyed, a local, property owner or seasonal visitor.
2. Only 374 people actually received the follow-up survey because 13 emails addresses bounced/were incorrect.

Market	Number of:			
	Completed On-Site Survey	Agree to Follow-Up	Completed Follow-Up (% of Total)	Response Rate
BC	58	43	19 (12%)	44%
Alberta	317	195	87 (52%)	45%
Other Canada	119	72	34 (21%)	47%
USA	71	34	10 (6%)	29%
Overseas	88	43	14 (9%)	33%
Total	**655**[1]	**387**	**164 (100%)**	**42%**

1. Two completed surveys did not have a market origin category.

2.2. Data Analysis

Once visitor survey data were downloaded, checked and coded[4], they were weighted or 'balanced' in four groups according to overnight accommodation capacity including KHMR, the Highway 1 corridor, downtown Golden and the Frontcountry/Blaeberry Valley.

Golden visitors were described using simple frequencies and averages from the interview and follow-up survey data. Other data analysis details include:

- Occasionally, top box analysis was used where the top two responses were summarized to understand meaningful differences between groups (e.g. visitors that responded with '4s' or '5s' on a 5-point satisfaction scale).
- Visitor expenditures were collected in both the on-site and follow-up surveys. Both surveys collected expenditures for each travel party (and not per visitor) but average party size was divided into total travel party expenditures to equal per person expenditures. Further, average length of stay in Golden was used to calculate expenditures on a per-person, per-day basis.
- To avoid the influence of outliers in expenditures, travel party and length of stay calculations, the top and bottom 2.5% of responses were trimmed.
- Open-ended (textual) responses were grouped into categories and summarized with percentages.
- Postal codes were collected for visitors from North America. City level geography was identified using geocoder.ca.
- Sample size warnings were provided as footnotes when response categories had less than 30 responses.
- Comparisons to winter 2016 results are made throughout the report. Please be aware that fewer surveys were conducted in 2017 and no intercept interviews were not conducted at Quartz Creek snowmobile trailhead in 2017 (they were in 2016).

In addition, data were summarized by:

1. Market - BC, Alberta, other Canadian provinces, the USA and Overseas. Only on-site survey responses are compared because follow-up data samples sizes are small for BC, the USA and Overseas (see Section 3.7).
2. NPS - Promoters and Passives/Detractors (see section 2.2.1.) - Highlights of those Golden visitors that are advocates of Golden (promoters) and are highly likely to recommend Golden compared to those that are not likely to recommend Golden as a travel destination (see Section 3.8).

Differences were identified by statistical tests and/or pragmatic differences. Pragmatic differences were identified between analysis categories (e.g. promoters vs. passives/detractor visitors) when result differed by 10% or more.

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[4] Coded means open-ended responses were categorized into meaningful groups.

2.2.1. Net Promoter Score

Growing customer service/experience expectations, changing tourism markets, and increasing worldwide competition have led to substantial shifts in the tourism marketplace over the past decade. The delivery of outstanding visitor experiences is critical to achieve higher revenues via increased spending, longer stays, repeat visits and visitors' positive word of mouth recommendations.

One goal of Destination British Columbia's (DBC) 2014 corporate strategy is for British Columbia to become the most highly recommended destination in North America. The Net Promoter Score® (NPS®)[5] measures the intention to recommend a travel destination and is also an indicator of overall satisfaction with the travel experience. Starting in 2016, Golden visitor surveys will collect the NPS to monitor visitor experience satisfaction.

NPS is measured by asking one question (likelihood of recommending Golden as a travel destination) on the follow-up questionnaire. The question's results are used to categorize visitors into one of three groups – promoters (very/extremely likely to recommend), passives (may or may not recommend) and detractors (not likely to recommend). Overall, the percent of detractors is subtracted from the percent of promoters to equal the NPS (see below).

How likely are you to recommend Golden as a travel destination to a friend, family member or colleague?

Not at all Likely - 0	1	2	3	4	5	6	7	8	9	10 - Extremely Likely
Detractors							**Passives**		**Promoters**	

$$\boxed{\text{\% Promoters}} - \boxed{\text{\% Detractors}} = \textbf{NPS}$$

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[5] Net Promoter, NPS and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

2.3. Tips for Reading Results

'Origin of Canadian Visitors' describes what the content e graph.

Level of Education
Percentage of Visitors FU

FU – Means data were collected on the follow-up questionnaire. If there isn't FU text, it means the data were collected during on-site interview.

Category	Percentage
University Post Graduate Degree	36%
University Undergraduate Degree	36%
Trade Certificate or College Diploma	21%
Some Post Secondary Education	3%
Secondary School Diploma	4%

Interpretation: 36% of Golden visitors had acquired a university post graduate degree.

Origin of Canadian Visitors
Percentage of Visitors Outside of BC and AB

The statement, 'Percentage of Visitors from Outside BC and AB' describes what the percentages mean. This graph represents percentages only of Canadian Visitors from outside of BC or Alberta (as opposed to all visitors).

Also, in this graph, there isn't a FU symbol, which means the data were collected during the on-site interview.

Province	Percentage
Ontario	39%
Quebec	29%
Manitoba	18%
Saskatchewan	7%
Nova Scotia	2%
Newfoundland	2%
Yukon	2%
NWT	2%

Interpretation: 39% of Canadian visitors from outside of BC and Alberta were from Ontario.

Footnotes about questions are noted here. Often they describe the 'other' categories, state the question, describe other note, or describe the number of responses (n).

1. Other US States include: Virginia, Texas, New York, Wyoming, Minnesota, Connecticut, Ohio, Arizona, Maine, South Dakota, Michigan, Florida.

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3.0. RESULTS

Market Origin
Percentage of Visitors

- 10% BC
- 10% USA
- 13% Overseas
- 18% Other Canada
- 49% Alberta

■ BC   ■ USA
■ Overseas   ■ Other Canada
■ Alberta
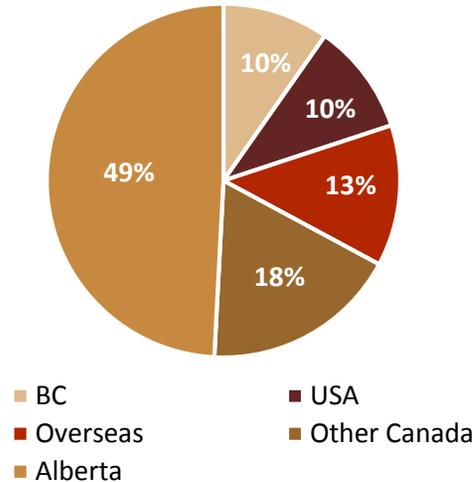
Origin of Visitors from Alberta (Top 10)
Percentage of Albertan Visitors

Calgary	61%
Edmonton	11%
Canmore	5%
Banff	3%
Airdrie	2%
Cochrane	2%
Spruce Grove	1%
Medicine Hat	1%
Red Deer County	1%
Beaumont	1%
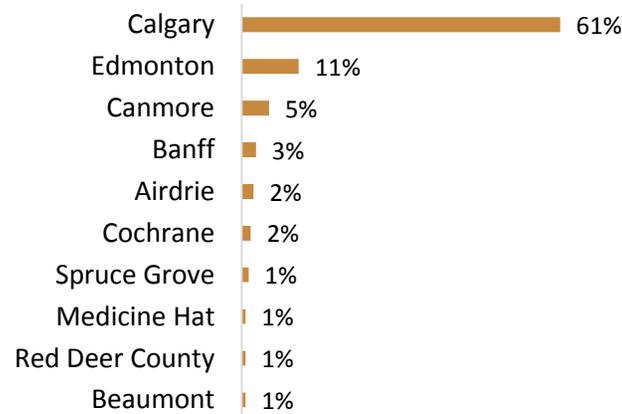
Origin of Visitors from BC (Top 10)
Percentage of BC Visitors
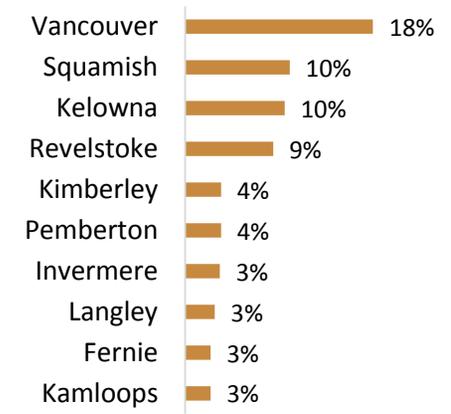
Vancouver	18%
Squamish	10%
Kelowna	10%
Revelstoke	9%
Kimberley	4%
Pemberton	4%
Invermere	3%
Langley	3%
Fernie	3%
Kamloops	3%

Origin of Canadian Visitors
Percentage of Visitors Outside of BC and AB

Ontario	39%
Quebec	29%
Saskatchewan	18%
Manitoba	7%
Nova Scotia	2%
Newfoundland	2%
NWT	2%
Yukon	2%
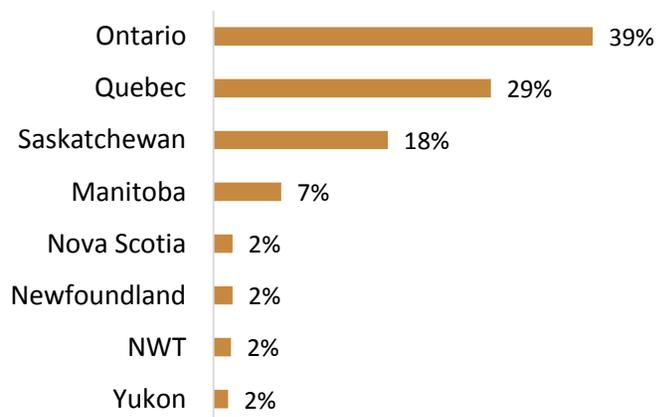
Origin of Visitors from USA (Top 10)[1]
Percentage of American Visitors
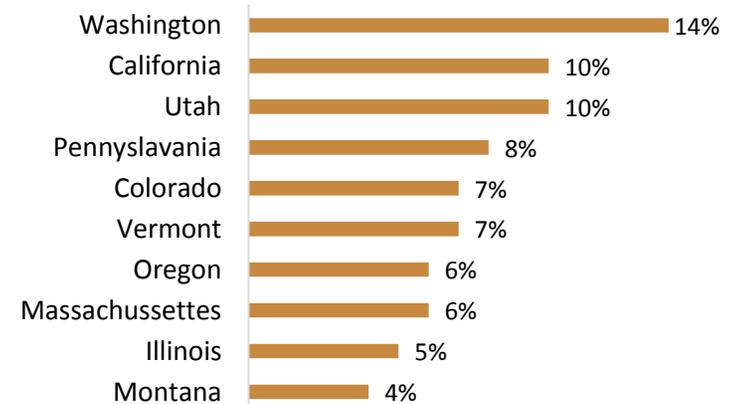
Washington	14%
California	10%
Utah	10%
Pennyslavania	8%
Colorado	7%
Vermont	7%
Oregon	6%
Massachussettes	6%
Illinois	5%
Montana	4%

1. Other US States include: Virginia, Texas, New York, Wyoming, Minnesota, Connecticut, Ohio, Arizona, Maine, South Dakota, Michigan and Florida.

3.1.Visitor Characteristics

Origin of Overseas Visitors[1]
Percentage of Overseas Visitors

- Europe ■ Australia/NZ ■ Other International

80%
15%
5%
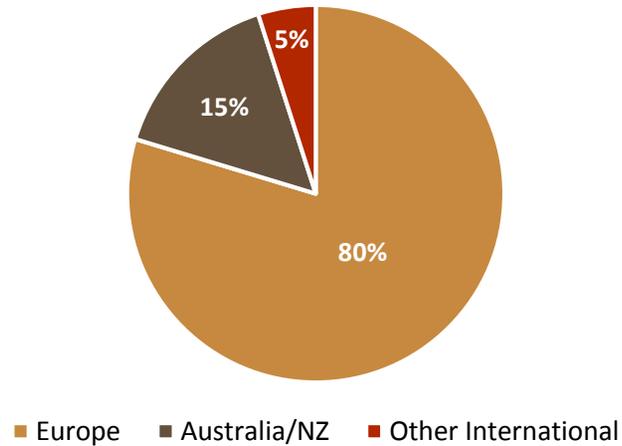
Origin of European Visitors[2]
Percentage of European Visitors

UK	33%
Germany	29%
Other Europe	19%
Sweden	12%
Denmark	6%
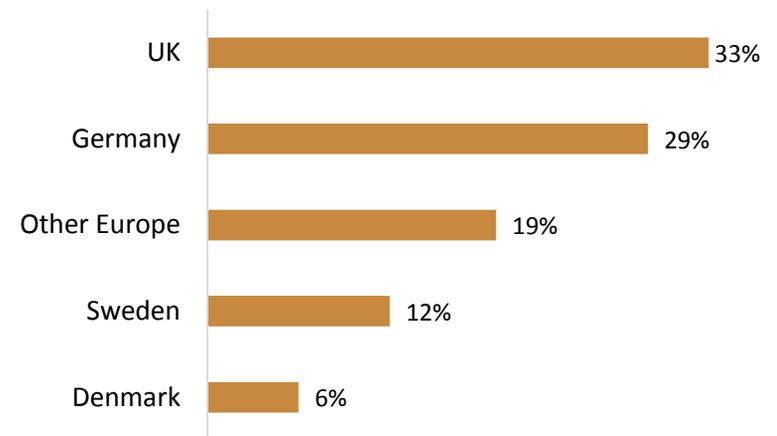
Gender
Percentage of Visitors

- Male ■ Female

39%
61%

Age
Percentage of Visitors

19-24 Years	9%
25-34 Years	37%
35-44 Years	20%
45-54 Years	17%
55-64 Years	13%
65-74 Years	3%
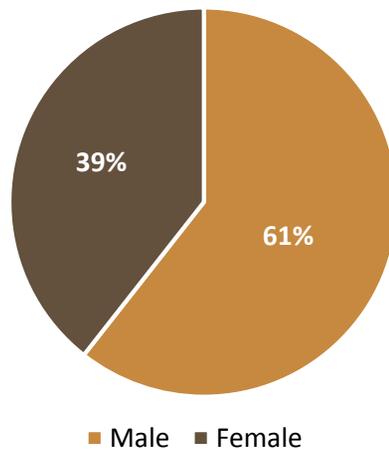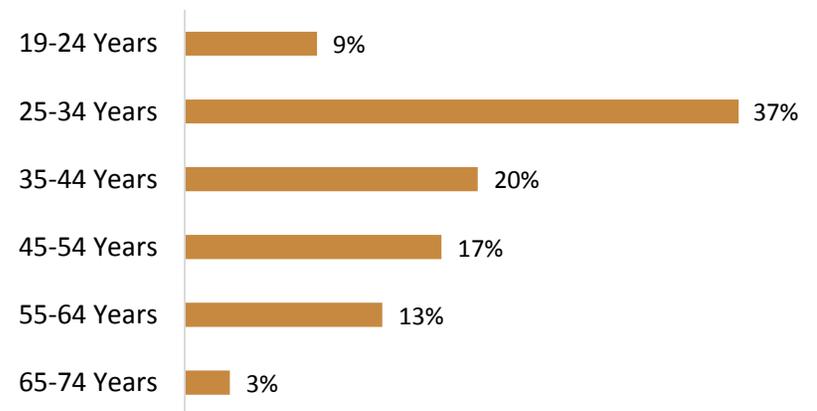
1. Other International includes: Mexico, Israel, Cayman Islands and South Korea.
2. Other Europe includes Switzerland (4%), Belgium (3%), Norway (3%), Spain (3%), France (2%), Finland (2%), Greenland (2%) and Netherlands (<1%).

Level of Education
Percentage of Visitors[FU]

University Post Graduate Degree	36%
University Undergraduate Degree	36%
Trade Certificate or College Diploma	21%
Some Post Secondary Education	3%
Secondary School Diploma	4%
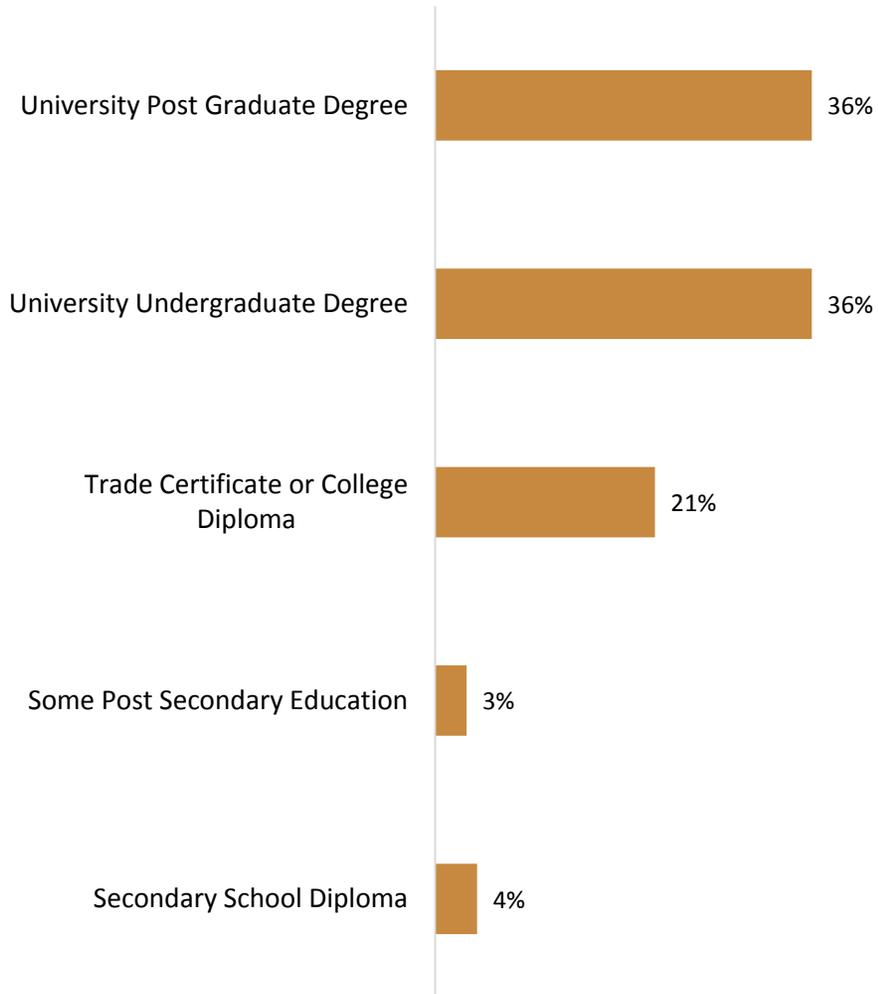
Annual Household Income ($CDN)
Percentage of Visitors[FU]

$150,000+	33%
$100,000 to $149,999	30%
$80,000 to $99,999	14%
$60,000 to $79,999	10%
$40,000 to $59,999	6%
$20,000 to $39,999	5%
< $20,000	2%
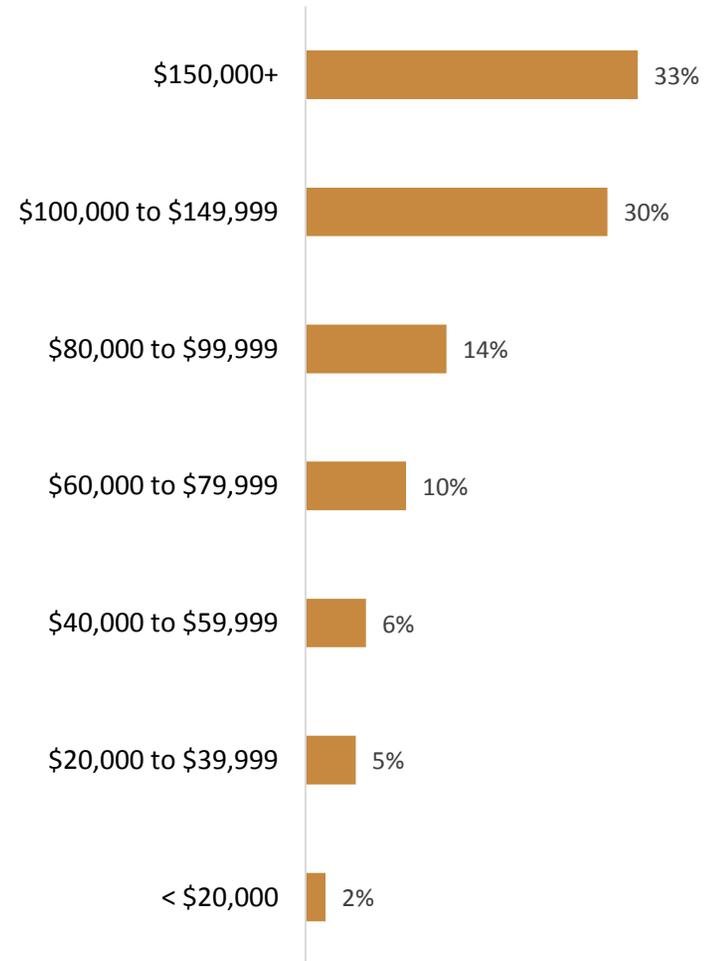
3.2. Trip Characteristics

Been to Golden Before?
Percentage of Visitors
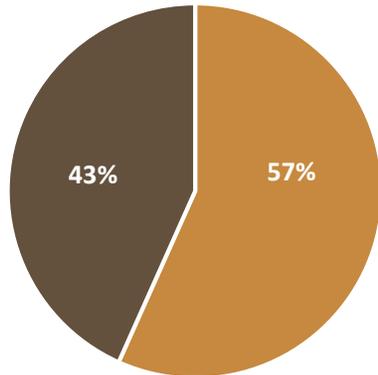
■ Previous Trip ■ First Time

Average Number of Past Trips to Golden:
10.2

Percent of Visitors That Have Made 1 Past Trip to Golden:
15%

Percent of Visitors That Have Made 10+ Trips to Golden:
40%

Season of Past Visitation
Percentage of Past Visits

	Been To Golden?[1]	
	Repeat Visitors	**First-Time Visitors**
Origin		
BC	11%	8%
AB	61%	34%
Other Canada	14%	23%
USA	6%	15%
Overseas	7%	20%
Primary Reason (Top 5)	1. Resort Skiing/Snowboarding (70%)	1. Resort Skiing/ Snowboarding (76%)
	2. X Country Skiing (6%)	2. X Country Skiing (5%)
	3. Visiting Friends and Relatives (5%)	3. Visiting Friends and Relatives (5%)
	4. Backcountry Skiing (3%)	4. Backcountry Skiing (3%)
	5. Family Vacation (3%)	5. General Relaxation (2%)
Length of Stay		
Day	11%	12%
Overnight	88%	88%
Average Nights	3.1	3.4

1. This table is read as origin, primary reason and length of stay of repeat or first-time visitors. For example, 11% of repeat visitors were from BC, whereas 8% of first-time visitors were from BC. 7% of repeat visitors were from overseas while 20% of first-time visitors were from overseas.

Primary Reason for Visit
Percentage of Visitors

Category	Percentage
Resort Skiing at KHMR	72%
Visiting Friends and Relatives	5%
Other Reason (Education or Medical)	4%
X Country Skiing	3%
Backcountry Skiing	3%
Family Vacation	3%
General Relaxation	2%
Other Activity	2%
Snowmobiling	2%
Business or Corporate Meeting/Event	1%
Snowshoeing/Other Nordic Activities	1%
Attend Or Be In A Wedding	1%
Break from Driving/Convenient Place...	1%
Cat or Heliskiing	1%
Sightseeing/Nature/Wildlife	<1%

Additional Activity Participation (Not Primary)
Percentage of Visitors

Category	Percentage
Ski/Snowboard at KHMR	50%
X Country Skiing	10%
Ski Touring/Backcountry Skiing	7%
Snowshoeing	6%
Snowmobiling	5%
Heli or Cat Ski/Snowboard	4%
Attend Hockey Game	2%
Other	1%
Ice-skating	1%
Fishing	1%
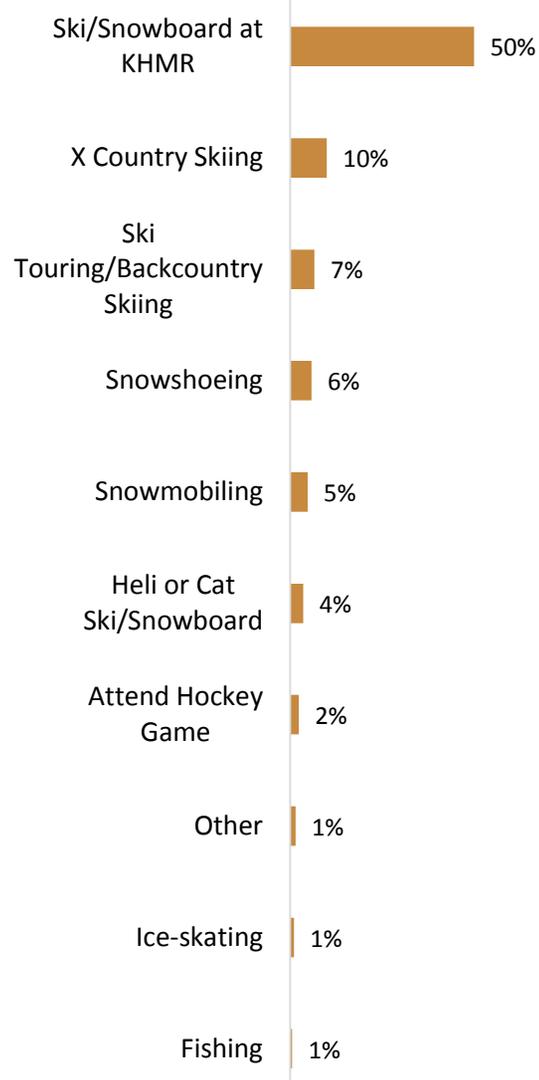
Golden Places Visited
Percentage of Visitors

| Category	Percentage
Eat in a Local Restaurant	73%
Visit a Pub or Bar	53%
Buy Gas	53%
Visit KHMR	43%
Shop for Groceries	40%
Shop for Gifts or Clothing	22%
Visit the Kicking Horse Pedestrian Bridge	12%
Walk/Cycle the Rotary Trails	6%
Visit the Art Gallery of Golden	5%
Visit National Parks	5%
Visit the Northern Lights Wolf Centre	3%
Attend A Concert/Event	2%
Visit the Golden Museum	1%
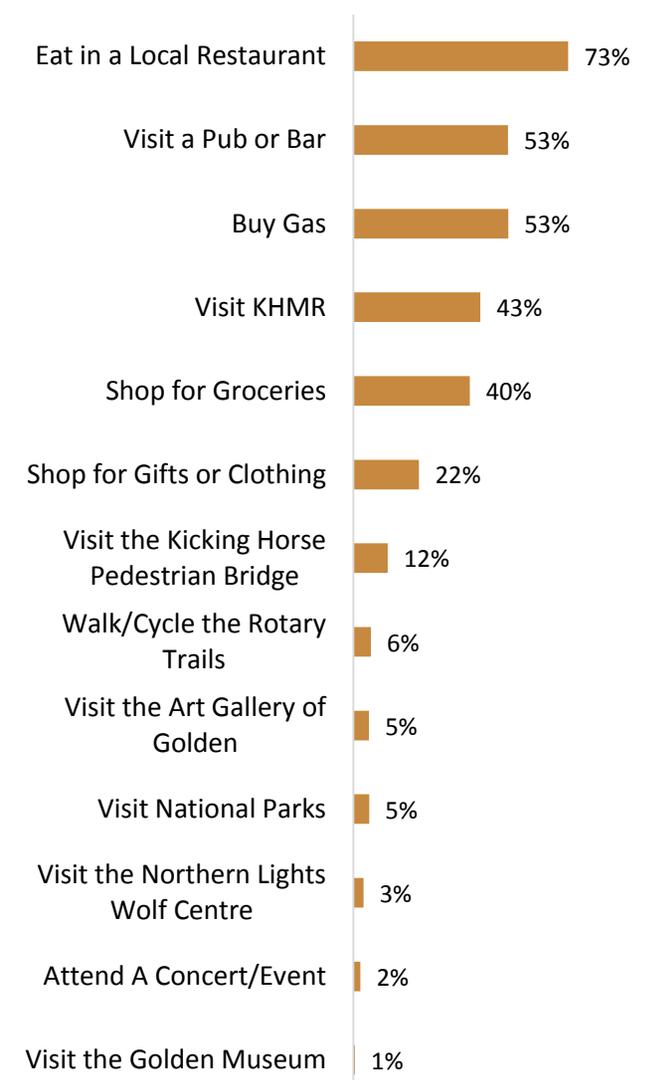
1. Golden visitors can participate in multiple activities or visit multiple places so the sum totals more than 100%.
2. Other includes: Curling (1), Fat Biking (1) Ice Climbing (4), Photography (1), Tube Park (1).

Length of Stay in Golden
Percentage of Visitors

Day, 11%
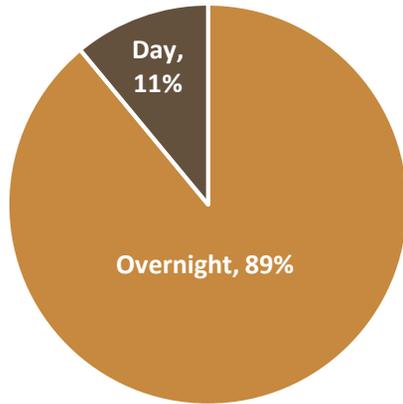
Overnight, 89%

Nights on Trip and in Golden
Percentage of Visitors

Nights	Total Trip Length	In Golden
1 night	10%	12%
2 nights	27%	38%
3 nights	16%	20%
4 nights	8%	12%
5 nights	6%	6%
6 nights	4%	4%
7 - 13…	17%	9%
14+ nights	10%	0%

Total Trip Length
In Golden
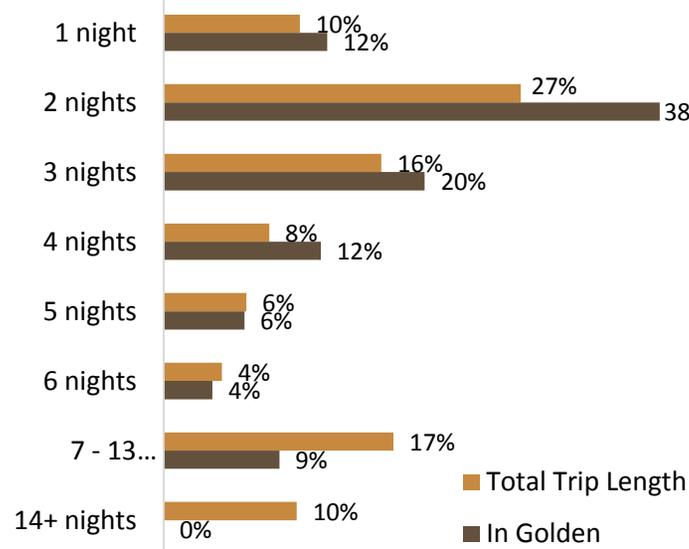
Average Overnight Trip Length:
5.5 nights

Average Nights in Golden:
3.2 nights

Time in Golden/Total Trip Length:
58%

Travel Party Composition
Percentage of Visitors

|	
Friend(s)	43%
Spouse/Partner	36%
Child/Children (< 16 years)	15%
Extended Family	6%
Sibling(s)	6%
Child/Children (> 16 years)	5%
Parent(s)	5%
Alone/by Myself	3%
Colleague(s)	3%
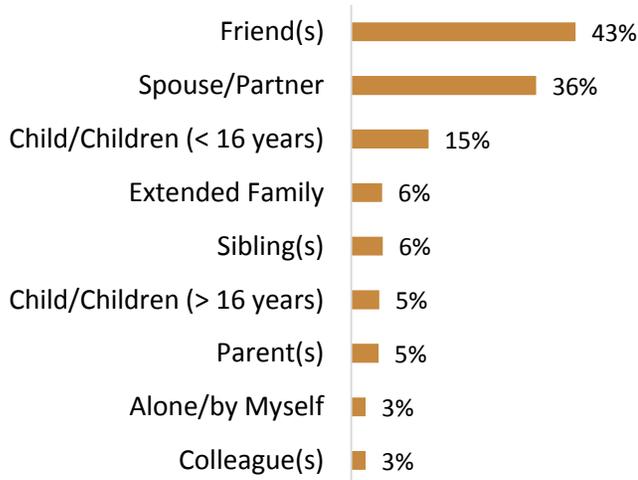
Average Travel Party Size:
4.1 people

Percent of Visitors Travelling in a Group:
5%

Type of Group:
- Sports Group (34%)
- Business Group (27%)
- Leisure Tour Group (21%)
- Other (18%)

Visit Downtown Golden?
Percentage of Visitors[FU]

No, 18%

Yes, 82%
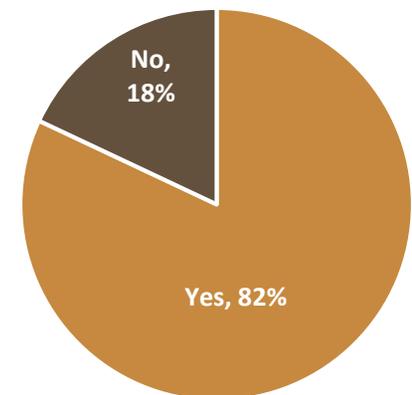
1. Golden visitors can be travelling with multiple travel party members so the sum totals more than 100%.

17

Golden Overnight Accommodation
Percentage of Visitors

- Other, 3%
- Camping, 3%
- Friends and Family, 12%
- Paid Roofed Accommodations, 82%
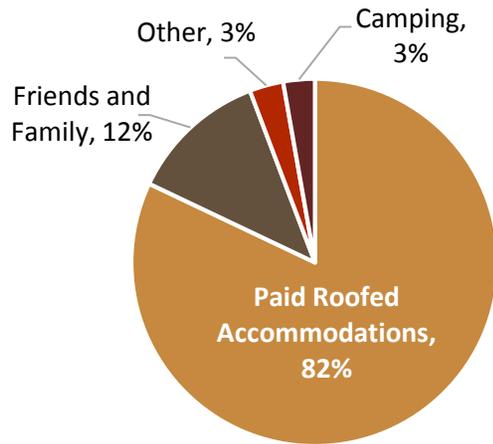
Paid Accommodation Location
Percentage of Visitors - Weighted

Location	%
Golden Adjacent to Highway 1	37%
Downtown Golden	25%
Front Country Blaeberry Valley Columbia Valley…	19%
Kicking Horse Mtn Resort	18%
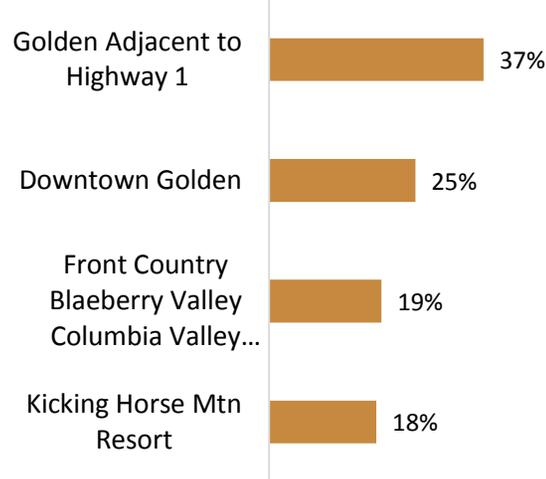
Accommodation Type
Percentage of Visitors

Type	%
Hotel/Motel	51%
Vacation Home…	17%
Cabin or Chalet…	14%
Bed & Breakfast	5%
Condo/Self…	4%
Hostel	4%
Other	4%
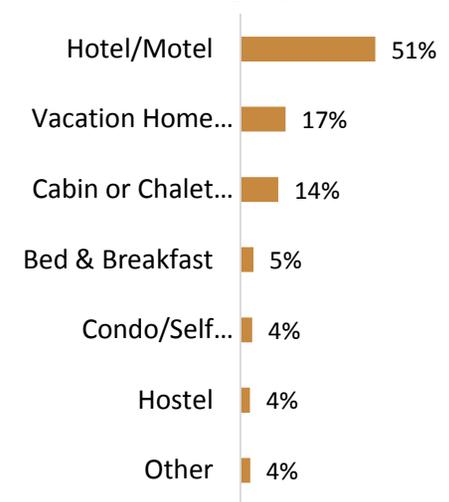
How Would You Describe Your Trip?
Percentage of Visitors

| Description	%
Golden Is The Primary Destination	68%
A Touring Trip (No Primary Destination)	22%
On Route To Another Primary Destination	10%
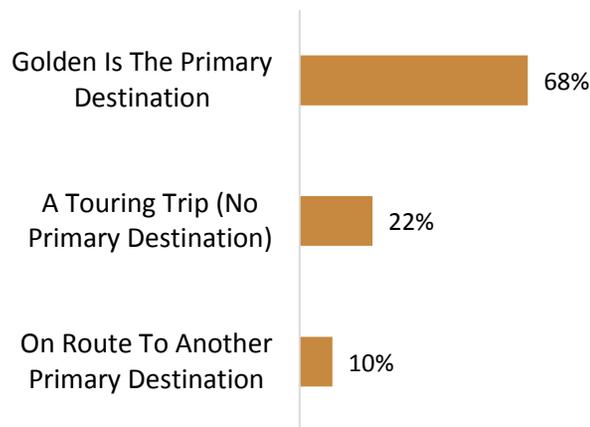
Other Primary Destinations
(62 responses)

- Banff/Lake Louise/Canmore (23%)
- Revelstoke (23%)
- Other BC (19%)
- Columbia Valley (16%)
- Lower Mainland/Whistler (10%)
- Thompson Okanagan (7%)
- Edmonton (2%)
- Calgary (1%)

After Your Arrival in Golden Did You Reduce or Extend your Stay from What You Originally Planned?
Percentage of Visitors[FU]

Response	%
No, I Did Not Extend Or Reduce My Stay	88%
Yes, I Reduced My Stay	2%
Yes, I Extended My Stay	10%
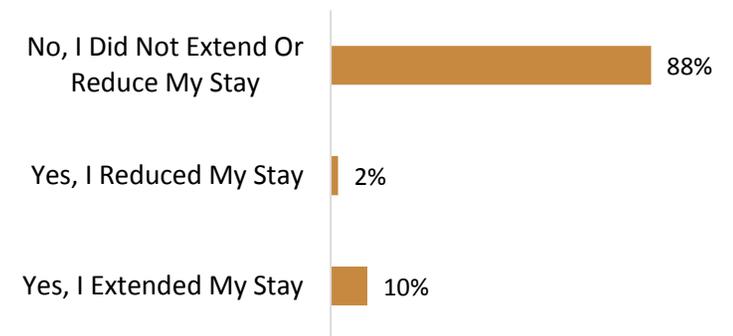
Expenditures in Golden (Averages)[1]				
	Visitor Party		**Per Person**	
	Trip Expenditures	**Daily Expenditure[2]**	**Trip Expenditures[3]**	**Daily Expenditure[4]**
Day Visitors	$327	$327	$83	$83
Overnight – VFR[5]	$815	$234	$229	$66
Overnight - Paid Roofed	$1,757	$555	$456	$144
Overnight - Camping	$321	$104	$131	$42
Overall	**$1,481**	**$464**	**$390**	**$122**

1. The expenditures presented were collected on the on-site interview.
2. Visitor Party Daily Expenditures = Visitor Party Trip Expenditures/Nights in Golden.
3. Per Person per Trip Expenditures = Visitor Party Trip Expenditures/ People in Travel Party.
4. Per Person Daily Expenditures = Per Person - Trip Expenditures/People in Travel Party.
5. VFR = Visiting (staying with) Friends and Family

Expenditures in Golden – Averages In Each Category[1]								
	Paid Accomm.	**Food and Beverage**	**Transportation**	**Shopping**	**Attractions**	**Outdoor Recreation**	**Other Entertainment**	**Other Expenditures**
Overnight - PAID								
% spent on	40%	20%	12%	2%	6%	16%	1.00%	2%
$ spent on	$703	$351	$211	$35	$105	$281	$18	$35
Overall[2]								
% spent on	**32%**	**22%**	**13%**	**3%**	**7%**	**19%**	**1%**	**2%**
$ spent on	**$474**	**$326**	**$193**	**$44**	**$104**	**$281**	**$15**	**$30**

1. The percent of expenditures presented in each category are collected in the follow-up online survey. n = 128, Sample sizes were small for overnight-VFR (14), overnight-camping (4) and day (15) visitors, therefore data is not reported. The average overall expenditures from the on-site interview were multiplied by the average percentage in each expenditures category to equal the average dollars spent for each category
2. Includes overnight paid, overnight – VFR, overnight - camping and day visitors.

| Trip Characteristics by Market						
	BC	**AB**	**Other Canada**	**USA**	**Overseas**	**TOTAL**
Been to Golden?						
First Time	66%	70%	44%	35%	32%	57%
Repeat Visitor	34%	30%	56%	65%	68%	43%
Travel Party Size (Average)	3.6	4.1	3.4	3.9	3.3	3.8
Type of Trip						
Golden is Primary Destination	79%	89%	59%	36%	21%	68%
Touring Trip	8%	6%	11%	23%	14%	10%
Other Primary Destination	13%	6%	30%	41%	64%	22%
Primary Reasons for Visiting (Top 5)	1. Resort Skiing at KHMR (53%) 2. VFR (9%) 3. Other Reasons (9%) 4. General Relaxation (9%) 5. Break from Driving (5%)	1. Resort Skiing at KHMR (72%) 2. X Country Skiing (7%) 3. Other Reasons (3%) 4. VFR (2%) 5. Other Winter Activity (2%)	1. Resort Skiing at KHMR (78%) 2. VFR (6%) 3. Family Vacation (4%) 4. Other Reason (3%) 5. Backcountry Skiing (3%)	1. Resort Skiing at KHMR (81%) 2. Backcountry Skiing (9%) 3. Cat or Heli Skiing (4%) 4. VFR (3%) 5. Snowmobiling (2%)	1. Resort Skiing at KHMR (73%) 2. VFR (11%) 3. Backcountry Skiing (6%) 4. Other Reason (3%) 5. Family Vacation (2%)	1. Resort Skiing at KHMR (72%) 2. VFR (5%) 3. Other Reason (4%) 4. X Country Skiing (3%) 5. Backcountry Skiing (3%)
Length of Stay						
Day	13%	12%	8%	17%	6%	11%
Overnight	87%	88%	92%	83%	94%	89%
Average Nights	3.6	2.4	4.0	3.7	4.2	3.2
Accommodation						
Paid Roofed Accommodation	84%	86%	75%	82%	78%	82%
Camping	0%	1%	1%	12%	7%	3%
VFR	16%	12%	16%	7%	10%	12%
Other	0%	2%	8%	0%	5%	3%
Average Expenditures (Per Trip/Per Party)	$1,439	$1,346	$1,669	$1,691	$1,663	$1,481

3.3. Awareness, Decision Making and Perceptions

3.3.1. Awareness

Aware of Golden Before Visit?[1]
Percentage of First Time Visitors

No, 21%

Yes, 79%
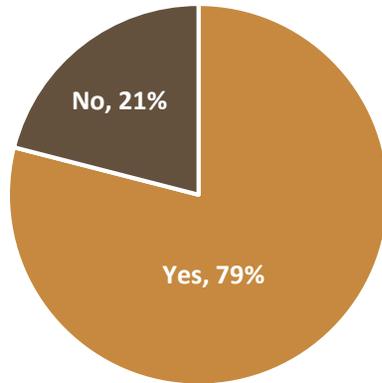
How Did You Originally Find Out About Golden?[2]
Percentage of Visitors[FU]

| Category	%
I Have Always Known About Golden	44%
Word of Mouth Recommendation	31%
I or My Family Used to Live in Golden	9%
Internet Search	5%
Sports Team Activity Group or Club Event	5%
Highway Signage	2%
Other	2%
Magazine or Newspaper Article	1%
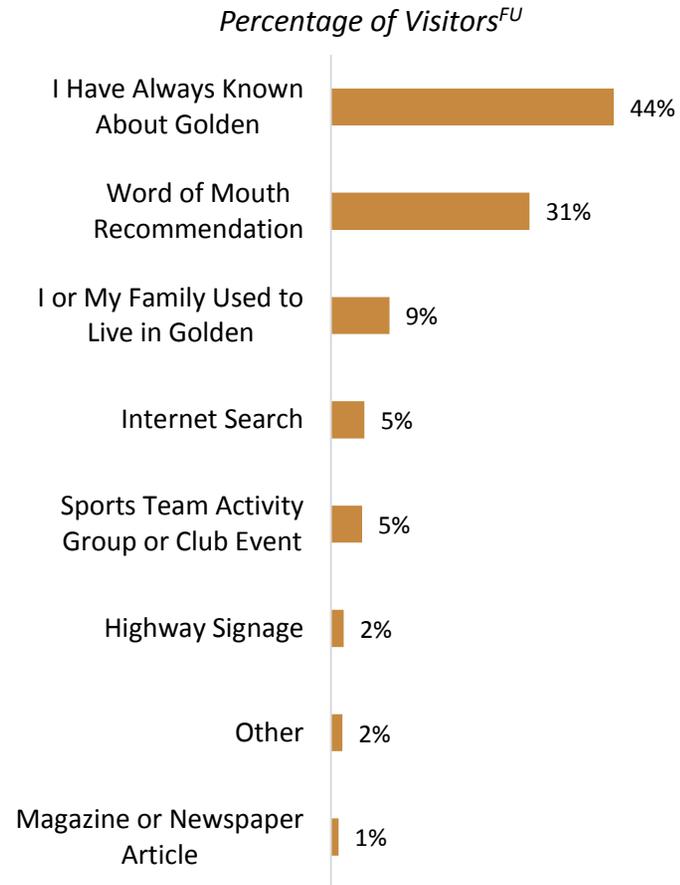
1. This was only asked of people that had not been to Golden on previous trips.
2. There were 161 responses to this question. Please note, consumer shows (Calgary Bike Show, Calgary Outdoor Wedding Show, Edmonton Bike Show, Edmonton Snowmobile and Power Sports Show, Saskatoon Snowmobile Show and the Vancouver Outdoor Show were included in the question but there were no responses.

3.3.2. Decision Factors

Consider Other Destinations?
Percentage of Visitors[FU]

Don't Know, 2%

No, 54%   Yes, 44%
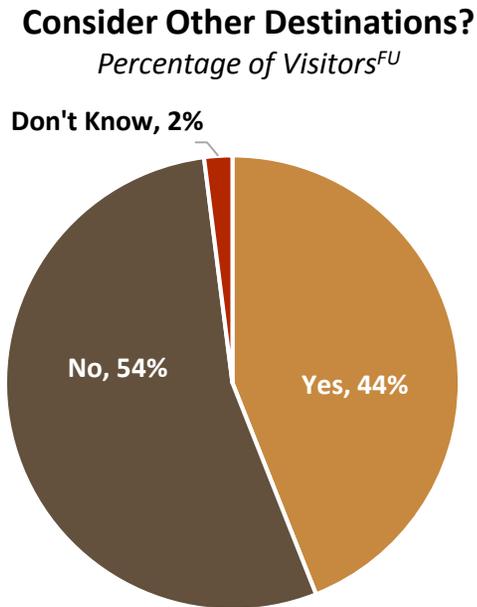
Other Destinations Considered[1]
Percentage of Visitors[FU]

BC
- Revelstoke — 57%
- Fernie — 29%
- Panorama/Inveremere/Radium — 21%
- Kimberley/Cranbrook — 10%
- Kelowna — 6%
- Whistler — 6%
- Field — 4%
- Golden — 4%
- Nelson — 4%
- Valemount — 1%
- SilverStar/Vernon — 1%

Alberta
- Banff/Canmore — 40%
- Lake Louise — 17%
- Jasper — 9%
- Calgary — 6%
- Other Alberta — 3%
- Other — 5%

Colorado — 1%
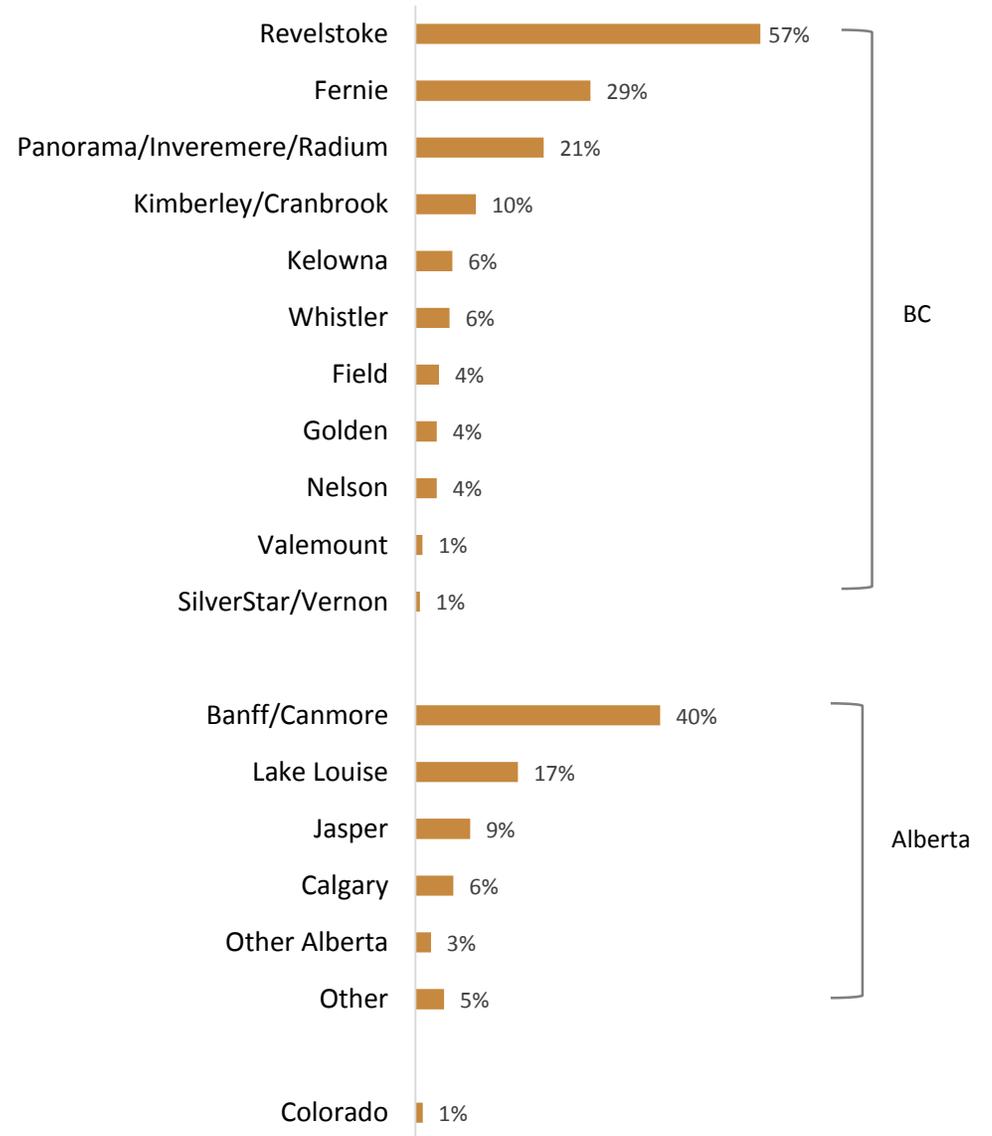
1. Visitors could respond with more than one response, therefore the percentages add up to more than 100%. 118 visitors suggested 238 other destinations.

Top Box Result - How Important Was Each Factor In Deciding To Visit Golden?

Percentage of Visitors[FU]

Factor	Percentage
Has Excellent Skiing and Snowboarding	88%
Has Access To A Good Variety of Outdoor Activities	81%
Has Friendly, Hospitable People	71%
The Community Is Close In Proximity To Nature and Wilderness	67%
The Community Is Close In Proximity To National Parks and Other Protected…	60%
Has Friendly and Helpful Front Line Staff	60%
Offers Good Value For Money	58%
Has Small Town Charm	54%
Has Excellent Nordic Skiing and/or Back Country Skiing	43%
It Is Familiar/I've Been There Before	42%
It Is A New Place To Explore	37%
Not Too Far From Home	36%
Is A Good Stop On Route To Another Destination	27%
I Have Friends and Family That Live in Golden	27%
Has Concerts and/or Public Events That I Wanted To Attend	17%
There Was A Personal Event (e.g. Wedding, Family Reunion) That I Wanted To…	16%
Has Excellent Snowmobiling	14%

3.3.3. Perceptions

What Are Three Words You Would Use to Describe Golden?		
Groups of Topic Words	**Percentage of Responses[1]**	**Topic Word Examples[1]**
Favourable		
Beautiful/Scenery/Landscape	46%	*Beautiful, Gorgeous, Stunning, Untamed*
Small/Quite/Quaint/Relaxing/Community	43%	*Small, Quaint - that's good, Quiet*
Skiing/Snowboarding	25%	*Beautiful Skiing, Skiing, Ski*
Friendly People	24%	*Welcoming, Friendly*
Awesome/Good/Fantastic/Fun	21%	*Fun, Great, Awesome*
Outdoorsy/Adventure/Recreation	17%	*Outdoorsy, Adventure*
Snow	15%	*Snow, Champagne Powder!!*
Other	11%	*Shut, Hard, Home, Vacation, Canadian*
Location/Access	9%	*Bridge, Close, Nice location*
Other Activities	8%	*Great Downhill Mountain Biking, Playground*
Original/Authentic/Unique	8%	*Rugged, Unique, Raw*
Friends/Family	4%	*Family Friendly*
Food/Good Restaurants/Entertainment	2%	*Good Eats At Reasonable Prices, Good Food*
Services (other than Food)	1%	*Good Accommodation*
Good Value	1%	*Inexpensive*
Atmosphere	1%	*Cosmopolitan*
Other Winter Activities	1%	*Many Sports In Winter*
Unfavorable		
Unappealing Town	4%	*Grungy, Ugly Town, Scruffy*
Industrial	3%	*Industrial, Rail town*

1. 148 visitors suggested 359 words. Totals do not add to 100% because one visitor suggested multiple words.

3.4. Trip Planning

3.4.1. Sources of Trip Planning Information

Online Sources of Visitor Information Used Before and During Trips to Golden[1]

Percentage of Visitors[FU]

Source	Before Your Trip	During Your Trip
Online Maps	42%	40%
KHMR Website	59%	34%
Search Engine	53%	24%
Social Media	25%	19%
Specialist Activity Website or App	19%	10%
Travel Commentary/Review Websites	17%	10%
Parks Canada Website	10%	9%
Tourism Golden Website	18%	8%
Other Online Source	9%	5%
Online Travel Agency	26%	4%
Destination BC Website	3%	2%
Destination Canada Website…	1%	2%
Online Travel Guide Websites	5%	2%
Kootenay Rockies Tourism Website or…	4%	2%

■ Before Your Trip ■ During Your Trip

What Kinds of Search Terms Did You Use?[2]

Percentage of Visitors That Used A Search Term[FU]

Search Term	%
Destination Related Terms (e.g. Golden)	47%
Activity Related Terms (e.g. Restaurants in Golden)	42%
Price Related Terms (e.g. cheap hotels)	25%
Terms Related to Specific Wants or Needs (e.g. dog friendly hotels in Golden)	20%
Specific Brand or Website Names (e.g. Holiday Inn Hotels)	9%
Other	9%
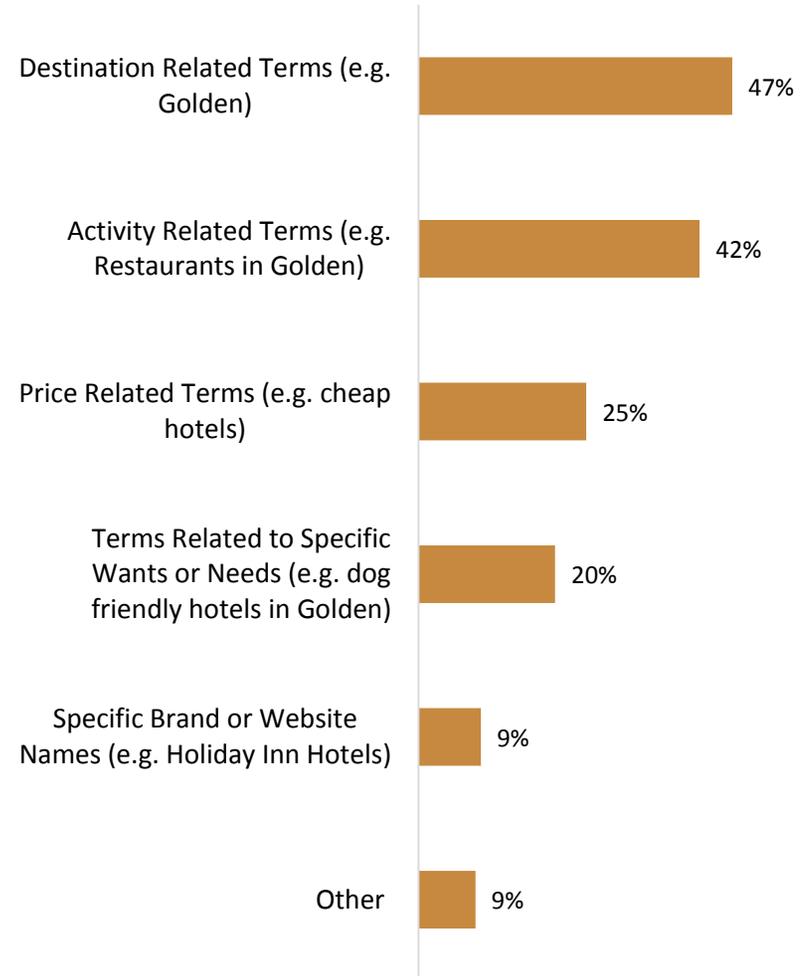
1. Which online sources of visitor information did you use to help plan your trip to Golden? Did you use the information before or during your trip? Visitors that responded 'none' were excluded in the above graphs.
2. Visitors could respond with more than one response so the percentages sum to more than 100%. Other included 7 responses, responses included; ski/avalanche conditions (5 responses), air miles (1), weather report (1).

Word-of-Mouth Sources of Visitor Information Used Before and During Trips to Golden
Percentage of Visitors[FU]

Source	Before Your Trip	During Your Trip
Friends and Family	55%	19%
Golden Locals	8%	34%
Local Business	5%	36%
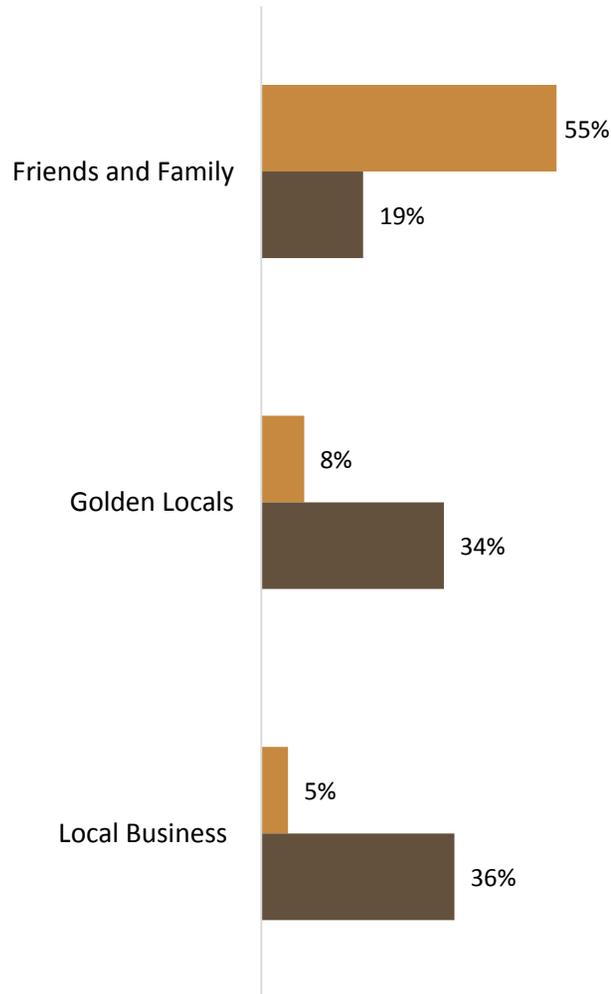
Printed Sources of Visitor Information Used Before and During Trips to Golden
Percentage of Visitors[FU]

Source	Before Your Trip	During Your Trip
Printed Maps That Include Golden	7%	12%
Destination BC Outdoor Adventure Guide	3%	3%
Other Printed Sources	2%	4%
Golden Travel Planner	2%	3%
Printed Travel Guide (e.g. Lonely Planet/Frommer's)	2%	1%

'Other' Sources of Visitor Information Used Before and During Trips to Golden
Percentage of Visitors[FU]

Source	Before Your Trip	During Your Trip
Vehicle's GPS System	7%	29%
BC Visitor Centre at Golden	1%	4%
Chamber of Commerce Office (Downtown Golden)	1%	1%
Consumer Show	0%	1%
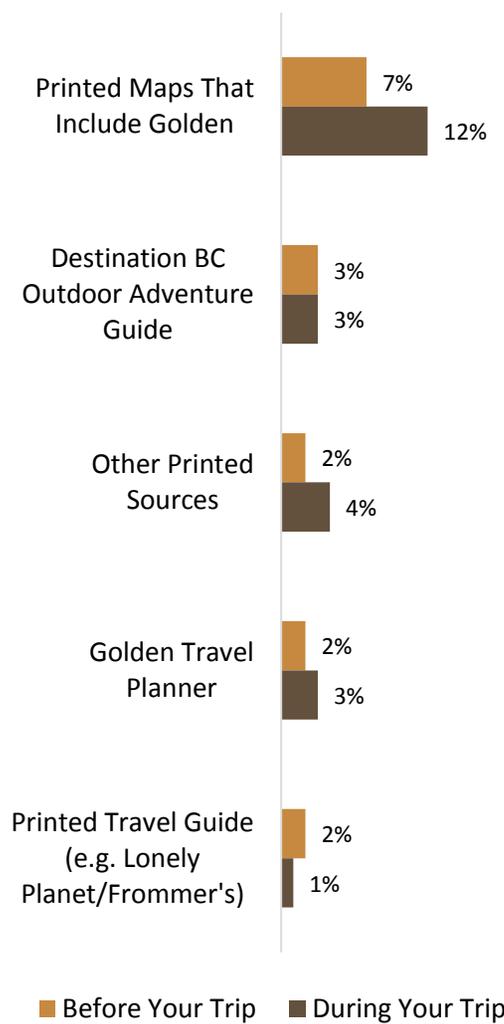
■ Before Your Trip ■ During Your Trip
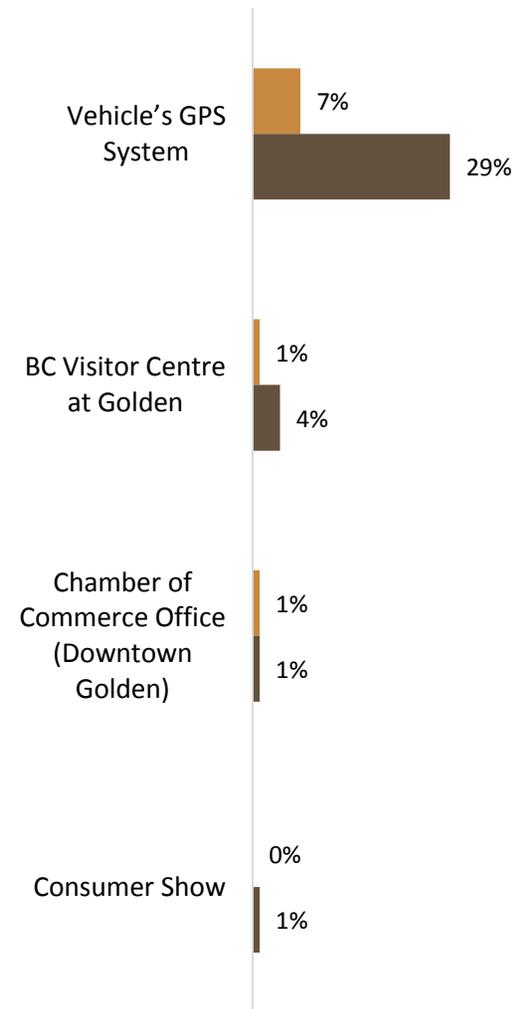
1. Which word of mouth, printed and other sources of visitor information did you use to help plan your trip to Golden? Did you use the information before or during your trip? Visitors that responded 'none' were excluded from the above graphs.

1.4.2. Social Media Use

Over The Past Year, Have You Regularly Used Social Media Or Travel Commentary Applications?

Percentage of Visitors[FU]

No, 32%

Yes, 68%
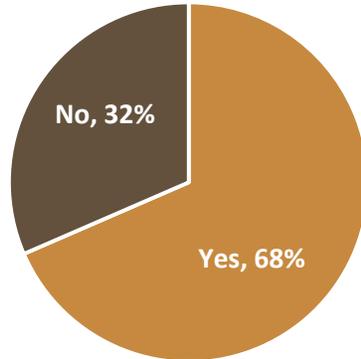
What Social Media or Travel Commentary/Review Applications Have You Regularly Used Over Past Year?

Percentage of Visitors Regularly Use Social Media[FU]

Facebook	46%
TripAdvisor	35%
Instagram	27%
YouTube	25%
LinkedIn	16%
Twitter	15%
Google+	14%
Yelp	13%
Pinterest	12%
Snapchat	7%
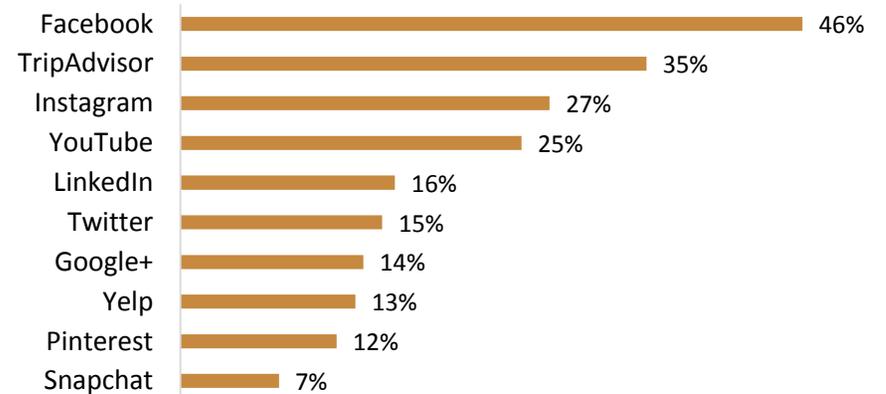
Did You Post Any Neutral Or Positive Comments Or Photos About Your Trip To Golden On Any Of These Social Media Or Travel Commentary/Review Applications?

Percentage of Visitors[FU]

No, 49%

Yes, 51%
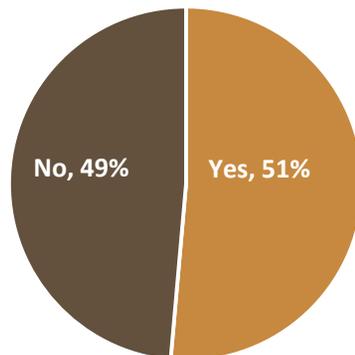
When Did You Post The Comment Or Photo?

Percentage of Visitors That Posted A Neutral Or Positive Comment[FU]

After Trip	62%
During Trip	82%
Before Trip	6%
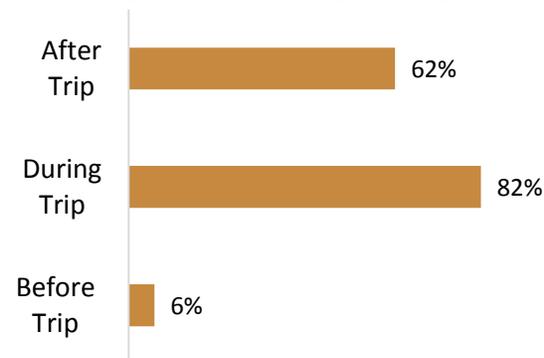
#GoldenBC hashtag use:

(48 responses):

2% (of those that posted comments)

#GoldenRules hashtag use:

(48 responses):

0% (of those that posted comments)

27

3.4.3. Accommodation Booking

Did You Pre-Book/Reserve Paid Accommodations In Golden?

Percentage of Visitors[FU]

No, 7%

Yes, 93%
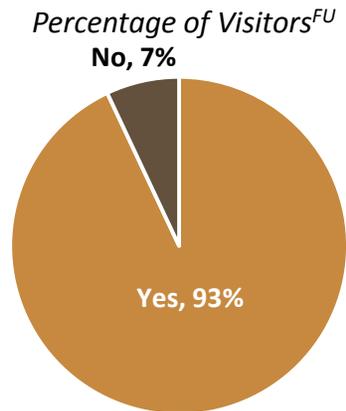
How Did You Pre-Book/Reserve Accommodation in Golden?

Percentage of Visitors That Pre-Booked/Reserved[FU]

Directly with the Accommodation Property	52%
Online Travel Agent	23%
Private Home Rental Service	16%
Kicking Horse Central Reservations	5%
Tour Operator	3%
Travel Agent	1%
RCR Central Reservations	1%
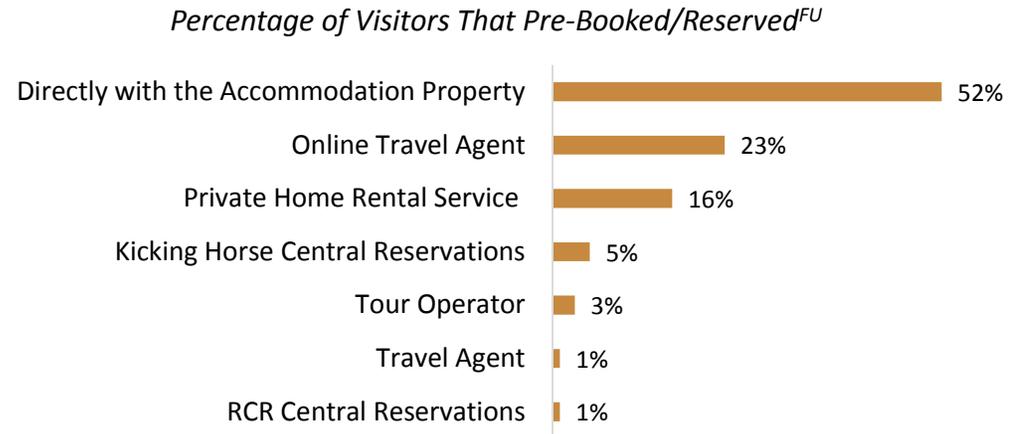
Which Private Home Rental Service Did You Use?[1]

Percentage of Visitors That Used A Private Home Rental[FU]

VRBO	37%
Airbnb	63%
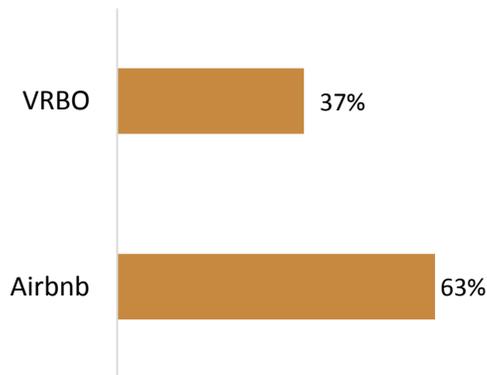
How Important Was The Ability To Book Your Accommodations Through A Private Home Rental Service In Your Decision To Visit Golden?[1]

Percentage of Visitors That Used A Private Home Rental[FU]

5 - Extremely Important	16%
4	28%
3	21%
2	35%
1 - Not Important At All	0%
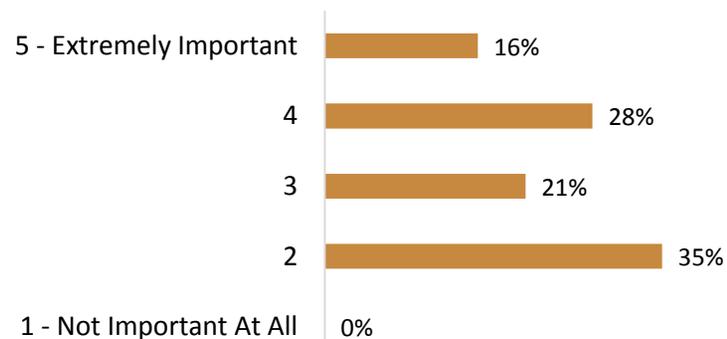
If This Kind Of Accommodation Was Not Available In Golden, Would You Have Still Stayed Overnight In Golden?[3]

Percentage of Visitors That Used A Private Home Rental[FU]

No, 29%

Yes, 71%
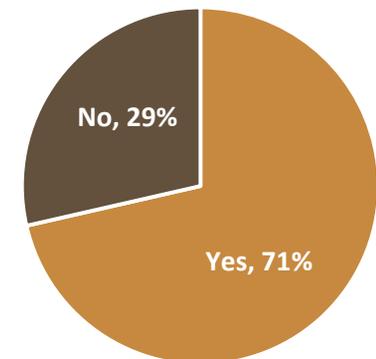
1. Sample sizes are small (n = 18), please use extreme caution when interpreting.

3.5. Visitor Information While in Golden

What Visitor Information Topics Did You Research And Obtain While You Were In Golden?
*Percentage of Visitors[FU]*

Topic	Percentage
Restaurants/Dining	49%
Activities	38%
Accommodations	28%
Events	22%
Attractions	18%
None	15%
Other	7%
Shopping	5%
Transportation	5%
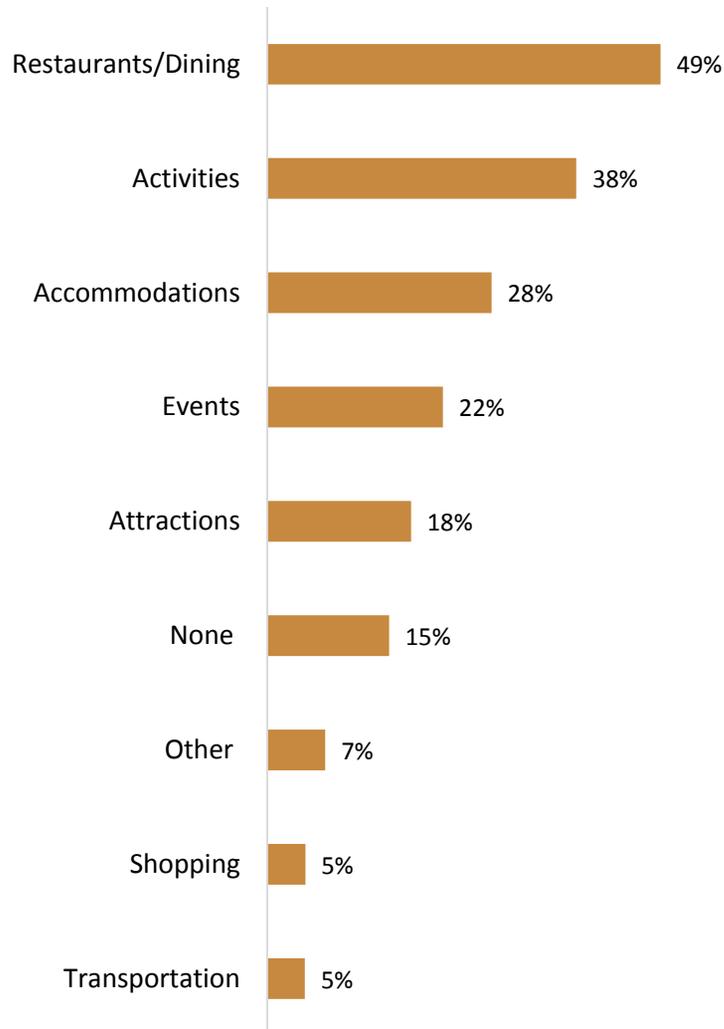
Other Information Researched/Obtained:
(14 responses)

- Alpine Ski Guides (8%)
- Recreation (8%)
- Shopping (8%)
- Ski Report/Conditions (50%)
- Sled Dog Adventures (8%)
- Weather (17%)

Top Box Results - The Visitor Information I Obtained In Golden Resulted Me Or My Travel Party...

*Percentage of Visitors Responding
4 or 5 on Agreement Scale[FU]*

Category	Percentage
Improving the Overall Quality of My Experience in Golden	50%
Increasing the Likelihood of Returning to Golden	49%
Visiting Places That I Didn't Already Know about in Golden	34%
Participating in Activities in Golden that I Did Not Originally Plan on Doing	25%
Spending Money That I Hadn't Anticipated on Spending While in Golden	22%
Staying Longer in Golden than I Originally Anticipated	12%

Scale: 1 = Do Not Agree At All to 5 = Strongly Agree

Top Box Results - Preferences For Obtaining Visitor Information While You Are In A Destination

Percentage of Visitors Responding 4 or 5 on Preference Scale[FU]

Category	Percentage
Online Via WiFi Using My Own Device	82%
Online Via Cellular Connection Using My Own Device	58%
By Talking To Locals	57%
By Talking To Other Visitors	42%
By Talking To People That Work At Tourism Businesses	35%
In-Vehicle Internet Access Via Cellular Connection	28%
Printed Materials Available at Accommodations or Other Tourism...	28%
In-Vehicle GPS System	27%
By Using Resources Obtained From A Local Visitor Information Centre	24%
Printed Materials at a Static (not digital) Kiosk At A Convenient Location	25%
Online Via A Digital Kiosk At A Convenient Location	4%

Scale: 1 = Do Not Agree At All to 5 = Strongly Agree

Were You Able To Obtain All Of The Visitor Information About Golden That You Needed?

Percentage of Visitors[FU]

No, 4%

Yes, 96%
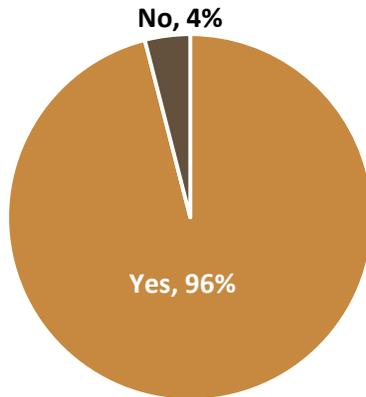
What Visitors Weren't Able to Find

(4 responses)

- Wanted detailed maps of the whole Golden area
- Restaurants/shops/nightlife/events
- Public use building hours/season day operation
- Places to have a dinner or tourism landscape

While In Golden, Were You Able To Access The Internet Via WiFi Connection When You Needed It??

Percentage of Visitors[FU]

No , 4%

Yes, 96%
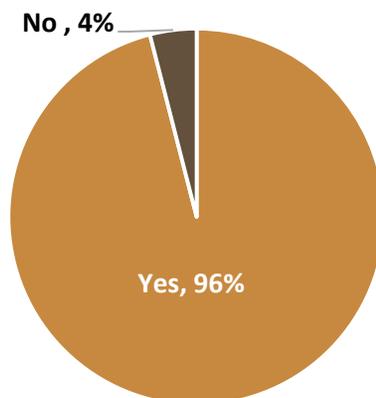
Where Visitors Weren't Able to Find WiFi

(5 responses)

- The hotel we stayed at had spotty WiFi. No big deal though.
- Motel
- General Golden area
- Did not have sufficient WiFi where we stayed
- Condo

WiFi Access Location

Percentage of Visitors[FU]

Location	Percentage
Accommodation	66%
Local Business WiFi	20%
Community WiFi Hot Spot	7%
Other	4%
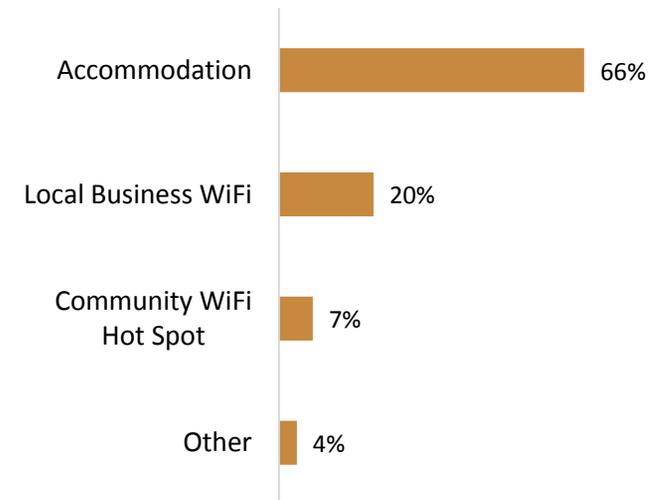
3.6. Evaluation of Golden Tourism Experiences

3.6.1. Meeting Expectations

How Did Golden Meet Your Expectations?
Percentage of Visitors

Top 10 Reasons Golden Exceeded Expectations:

(199 visitors had 272 reasons)

- Good skiing/resort/conditions (47%)
- Fun/Good Visit/Nice/Like Area (16%)
- Beautiful/Scenery/Wildlife/Nature (12%)
- Good Weather (8%)
- Nice Town/Second Home/Hidden Gem (7%)
- Consistently Good/Expect Good Experience (7%)
- Friendly/Nice People (5%)
- Good Trails/Hiking (4%)
- Slow Service/Long Lines/Need More Lifts (4%)
- Good Food/Restaurant (4%)Good Food/Restaurant/Fun/Good Visit/Nice/Like Area (6%)

Top 7 Reasons Golden Fell Short of Expectations:

(12 visitors had 13 reasons)

- Slow Service/Long Lines/Need More Lifts (47%)
- Just Passing Through (9%)
- Beautiful/Scenery/Wildlife/Nature (9%)
- Poor Skiing/Snow/Conditions/Grooming (9%)
- Poor Accommodation/Food (9%)
- Need More Facilities/Infrastructure/Services/Small Town (9%)
- Expensive (9%)

Top 10 Reasons Golden Met Expectations:

(215 visitors had 298 reasons)

- Good skiing/resort/conditions (35%)
- Fun/Good Visit/Nice/Like Area (18%)
- Consistently Good/Expect Good Experience (10%)
- Slow Service/Long Lines/Need More Lifts (9%)
- I'm a Regular Visitor (8%)
- Beautiful/Scenery/Wildlife/Nature (5%)
- Need More Facilities/Infrastructure/Services/Small Town (5%)
- Good Accommodations (5%)
- Friendly/Nice People (4%)
- Nice Town/Second Home/Hidden Gem (3%)

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3.6.2. Likelihood of Return to Golden

Given Your Experience In Golden, On A Scale of 1 To 5, How Likely Are You To Return On An Overnight Trip To Golden?
Percentage of Visitors[FU]
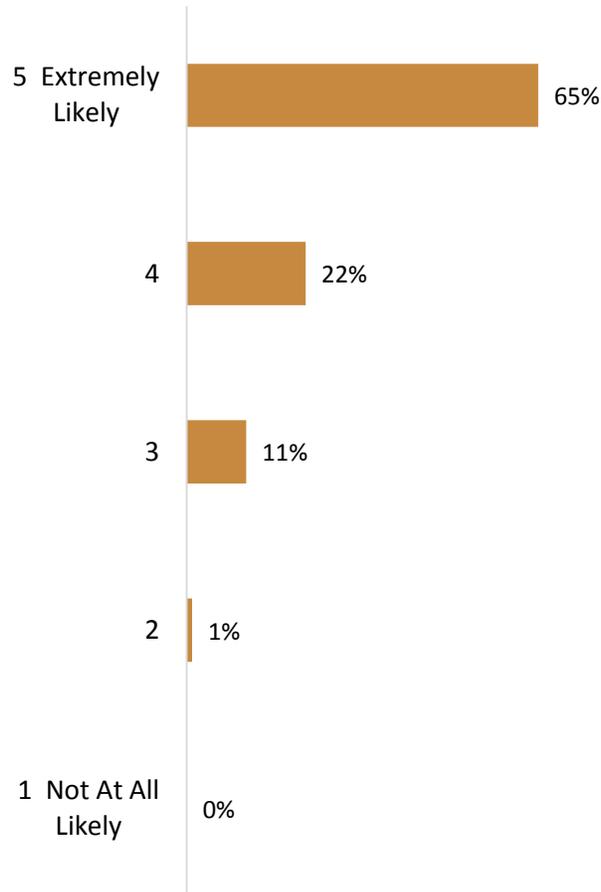
Average Likelihood of Return:

4.5

	Likelihood of Return Segement[1,2]	
	Likely	**Somewhat/Not Likely**
Origin		
BC	11%	22%
AB	54%	52%
Other Canada	21%	16%
USA	6%	0%
Overseas	9%	10%
Primary Reason (Top 5)	1. Resort Skiing/Snowboarding (70%) 2. X Country Skiing (6%) 3. Visiting Friends and Relatives (5%) 4. Family Vacation (5%) 5. Backcountry Skiing (5%)	1. Resort Skiing/Snowboarding (72%) 2. General Relaxation (10%) 3. Other Outdoor Activities (5%) 4. Other Reason (5%) 5. Attend or Be In A Wedding (3%)
Length of Stay		
Day	12%	11%
Overnight	88%	89%
Average Nights	3.5	3.5

1. Likely are visitors that scored Golden as a '4' or '5' on the likelihood to return scale. Somewhat/Not Likely scored '1', '2' or '3' and had small sample sizes (n=19).
2. This table is read as origin, primary reason and length of stay as a percent of visitors that were likely or not-likely to return. For example, 11% of visitors likely to return were from BC, whereas 22% of visitors not likely to return were from BC.

3.6.3. Components of Tourism Experience

Please Rate Your Experience of Each Component of Your Visit to Golden[FU]

*Top Box Responses - Percentage of Visitors Responding 4 or 5*

Overall Experience in Golden	91%
Recreation and Adventure Opportunities	97%
Accommodation	79%
Signage on Trans Canada Hwy 1	71%
Dining	66%
Local Directional Signage	65%
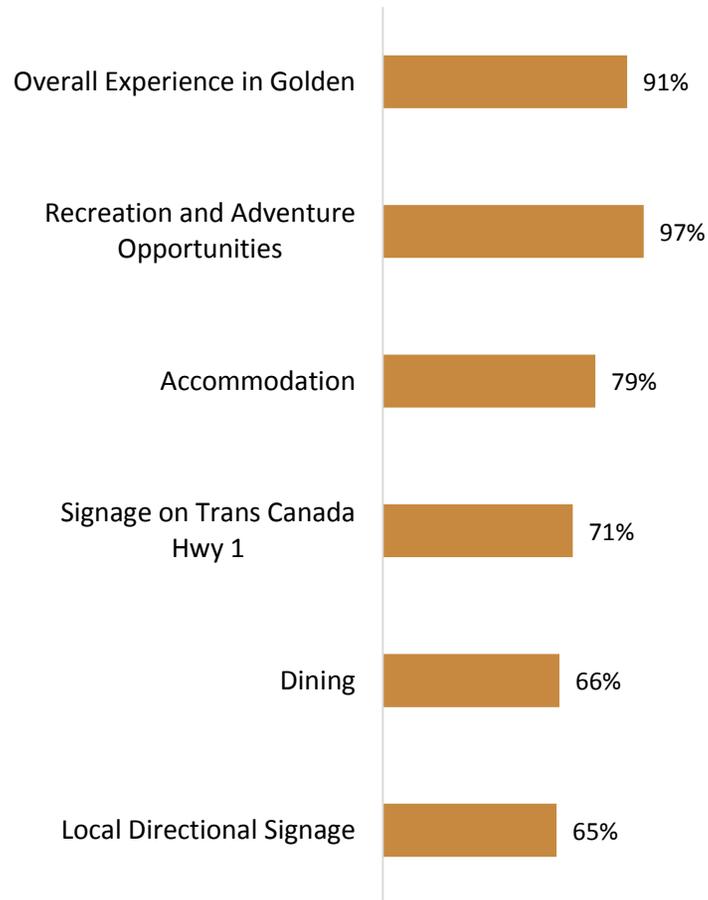
Scale: 1 = Very Poor and 5 = Excellent

Component	Average Rating
Overall Experience	**4.4**
Recreation and Adventure Opportunities	4.7
Accommodation	4.2
Signage on Trans Canada Hwy. 1	4.0
Dining	3.8
Local Directional Signage	3.8

3.6.4. Net Promoter Score

How Would You Rate Your Likelihood To Recommend Golden As A Travel Destination To Friends/Family Or A Colleague?
Percentage of Visitors[FU, 1]

Scale	%
10	38%
9	20%
8	22%
7	7%
6	4%
5	4%
4	3%
3	2%
2	0%
1	0%
0	0%
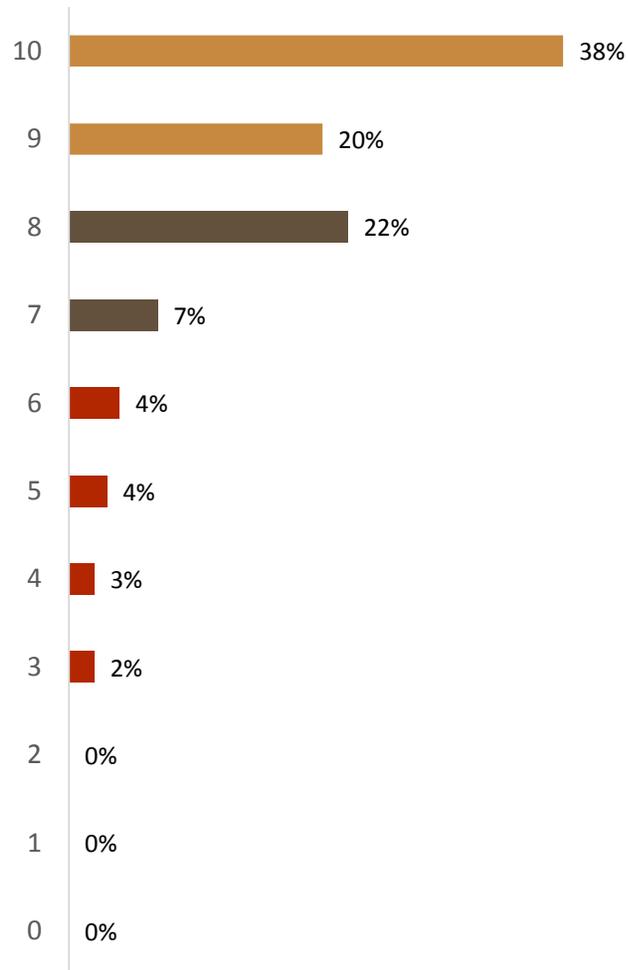
Scale: 0 = Not Likely At All and 10 = Extremely Likely

Golden's Overall Net Promoter Score (NPS)
Percentage of Visitors[FU, 1]

- Promoters — 58%
- Passives — 29%
- Detractors — 13%

NPS = 45.9
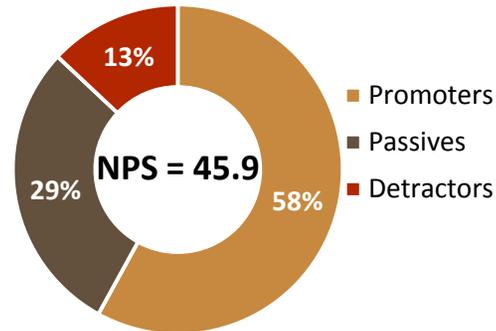
NPS By Market:

BC NPS[2] = -8.0
Alberta NPS = 49.2
Other Canada NPS = 53.0
USA/Overseas NPS[2] = 72.3

	NPS Segement[1]	
	Promoters	**Passives and Detractors**
Origin		
BC	6%	22%
AB	55%	51%
Other Canada	21%	19%
USA	8%	2%
Overseas	11%	6%
Primary Reason (Top 5)	1. Resort Skiing/Snowboarding (70%) 2. Family Vacation (7%) 3. X Country Skiing (6%) 4. VFR (4%) 5. Backcountry Skiing (4%)	1. Resort Skiing/Snowboarding (67%) 2. VFR (7%) 3. Other Reason (7%) 4. X Country Skiing (7%) 5. Backcountry Skiing (3%)
Length of Stay		
Day	11%	14%
Overnight	89%	86%
Average Nights	3.4	3.7

1. This table is read as origin, primary reason and length of stay as a percent of promoters or passives/detractors visitors. For example, 6% of promoters were from BC, whereas 22% of passives/detractors were from BC.

1. Visitors were classified as promoters ('9' or '10' on likelihood scale), passives ('7' or '8' on likelihood scale) or detractors ('0' to '6' on likelihood scale).
2. There were very low sample sizes from BC (n= 19) and the USA/Overseas (n = 21). Use extreme caution when interpreting.

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| Comment	Reasons for NPS Rating – Percentage of Visitors (n = 144)[1]			
	Promoters	**Passives**	**Detractors**	**Total**
Good Skiing/Snowboarding/Mountain	54%	46%	20%	48%
Great Town/Atmosphere	17%	7%	0%	13%
Overall Good Time	16%	13%	6%	14%
Friendly People	12%	0%	6%	8%
Good Variety of Outdoor Activities	10%	13%	6%	11%
Location/Proximity to Home	5%	13%	13%	8%
Good Food/Restaurants	5%	7%	0%	5%
Good Accommodation Facilities	5%	4%	0%	4%
Good Value	5%	7%	0%	5%
Less Busy/Touristy	5%	2%	0%	4%
Scenery/Landscape	3%	0%	12%	3%
Friends/Family Live Here	2%	2%	9%	3%
Backcountry Activities	1%	0%	0%	0%
Good Snowmobiling	1%	0%	0%	1%
Come Back To Do Other Summer Activities	0%	0%	0%	0%
Good X Country Skiing	0%	0%	0%	0%
Good Services	0%	0%	0%	0%
Work	0%	0%	0%	0%
Already Recommended	0%	2%	0%	1%
Too Far From Home	1%	5%	0%	2%
Poor Skiing/Mountain	1%	0%	9%	2%
Explore Other Areas	0%	0%	6%	1%
Limited Services/Experiences/Activities	3%	5%	24%	6%
Too Expensive	0%	0%	0%	0%
Quiet/Limited Entertainment	1%	2%	0%	1%
Too Industrial/Poor Aesthetics	0%	0%	7%	1%
Other	1%	2%	13%	3%

1. 144 visitors had 2064 comments about their likelihood or recommending Golden to the family/friends/colleagues. Visitors made more than one comment so column percentage will sum to more than 100%.

## 3.6.5. New Products, Services and Experiences

Are There Any New Or Expanded Products, Services Or Experiences That Would Enhance Your Visit to Golden?

Percentage of Visitors[FU]
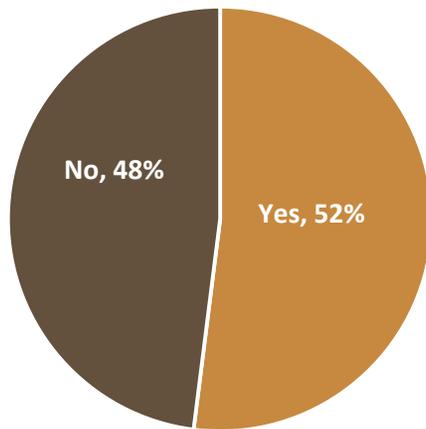
Recommended New/Expanded Products, Services or Experiences[1]

Percentage of Visitors That Recommended Expanded Services[FU]

Category	Percentage
More/Better Restaurants	42%
Other	17%
More Walking Paths/Trails	13%
More Attractions/Activities	11%
More Evening Entertainment	8%
More Ski Lifts	8%
Enhance Vibrancy of Downtown	8%
More Shopping/Services	7%
Public Pool/Hot Tub	7%
Better Signage	5%
More Accommodation/Hotels	5%
KHMR/Downtown Shuttle	5%
More Snowmobiling Trails	2%
Better Transportation To/From Golden	2%

Pie chart: No, 48%; Yes, 52%

1. 43 visitors made 63 recommendations. Since visitors could make more than one suggestion percentages sum to more than 100%.
2. Suggestions in the other category are (1 each): showers in the locker room, a tourism book, Information and advertising about events, I would like to see souvenirs that say Golden at the resort, much better mountain brush clearance on the runs/trails and more strict adherence to catch out of control/speeding skiers/snowboarders on different trails at different times.

3.7. Market Summary

Golden visitors were organized into groups based on their market origin including visitors from BC, Alberta, other Canada (from provinces outside BC and Alberta), the United States and overseas. Key differences[6] in on-site interview results for each market (when compared to other markets) are highlighted in the table below. It was also noted if there was a similar result found in winter 2016. Small sample sizes prevented comparisons for follow-up survey responses.

Measure	Market - Summary of Differences	Similar Result in Winter 2016?
Age	• Visitors from Alberta were younger than other visitors. A total of 51% were less than 34 years old, whereas only about a 40% of visitors from other locations were less than 34 years old. Also, 8% of Albertans were between 54 and 64 years old compared to 20% from other Canada, 16% from the USA and 20% from overseas.	Yes
Gender	• More visitors from BC were female (52%) compared to those from Other Canada, the USA and overseas (<32%).	No
Previous Visitation	• Visitors from BC and Alberta (>60%) were more likely to have been to Golden on a previous visit than visitors from other Canada (44%), the USA (35%) or overseas (32%).	Yes
Primary Reason	• Visitors from BC were more likely to be passing through Golden/taking a break from driving (5%) or be on a general relaxation trip (9%) compared to other visitors from outside of BC. • Visitors from outside of BC (>72%) were more likely to be on a trip to ski at KHMR than visitors from BC (53%). • Americans were more likely to be on a backcountry ski trip (9%) compared to visitors from other origins (<6%).	Yes
Length of Trip	• On average, visitors from the overseas (13.2 nights), the USA (7.7 nights) and other Canada (8.0 nights) were on longer trips than those from BC (4.3 nights) or Alberta (2.7 nights).	Yes
Golden Length of Stay	• On average, overnight visitors from overseas (4.2 nights), the USA (3.7 nights), other Canada (4.0 nights) and BC (3.6 nights) stayed in Golden longer than visitors and Alberta (2.4 nights).	Yes
Trip Type	• Visitors from Alberta (89%) and BC (79%) were much more likely to be on a trip where Golden was the destination compared to other visitors (<59%). Visitors from overseas (64%) and the USA (41%) were more likely to be on touring trips.	Yes
Awareness	• Visitors from Alberta (92%) and BC (79%) were much more likely to be aware of Golden before their trip compared to overseas visitors (< 69%).	Yes
Accommodation	• Visitors from overseas (6%) and the USA (8%) were more likely to camp than those from other origins (<1%). This result is due to small sample sizes in visitors from the US and overseas.	No
Expenditures	• There were no differences in expenditures by market origin.	No

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[6] Key differences were identified by statistical tests or those with pragmatic differences of more than 10% difference between groups.

3.8. NPS – Promoter Characteristics

Past research in Golden and other destinations has found that characteristics of Golden promoters differ from those that are not as likely to recommend Golden (passives/detractors). Visitors that were categorized as Golden *promoters* (9 or 10, on the 0-10 likelihood to recommend scale) were compared to those that were *passives* (7 - 8, on the 0-10 likelihood to recommend scale) and *detractors* (0 - 6, on the 0-10 likelihood to recommend scale). Passives and detractors were grouped to ensure sufficient sample sizes for analysis. Key differences[7] are highlighted in the table below. It was also noted if there was a similar result found in winter 2016.

Measure	Promoters and Passives/Detractors- Summary of Key Differences	Similar Results in Winter 2016?
Market Origin	• Promoters were less likely to be from BC (6%) than passives/detractors (22%). Conversely, promoters were more likely to be from the USA (8%) compared to passives/detractors (2%).	Yes
Travel Party Composition	• Promoters were more likely to be travelling with their spouse (49%) than passives/detractors (34%).	No
First Trip	• Promoters were more likely to be a repeat visitor (70%) than passives/detractors (60%).	No
Primary Reason	• There was no difference in primary activities between promoters and passives/detractors.	No
Other Activities	• Promoters were more likely to cross-country ski (22%) than passives/detractors (9%).	No
Places Visited	• Promoters were more likely to visit a Golden restaurant (81%) than passives/detractors (69%).	No
Accommodation	• Promoters (71%) were less likely to stay in paid roofed accommodations than passives/detractors (63%). Promoters were also less likely to stay in a hotel/motel (46%) and more likely to stay in a Bed & Breakfast (10%) compared to passives/detractors (58% and 0%, respectively).	No
Golden Length of Stay	• There was no difference in length of stay between promoters and passives/detractors.	Yes
Trip Type	• There was no difference in trip type between promoters and passives/detractors.	No
Visit Downtown	• There was no difference in Golden downtown visitations between promoters and passives/detractors.	Yes
Expenditures	• Promoters spent more on average ($1,420) than passives/detractors ($867).	No
Awareness	• There was no difference in awareness between promoters and passives/detractors.	Yes
Decision Factors	• Promoters were more likely to rate the following factors as important (4s or 5s on importance scale) compared to passives/detractors: has a variety of outdoor activities (promoters - 46%, passives/detractors - 36%), excellent skiing/snowboarding (promoters - 92%, passives/detractors - 82%), close to nature (promoters - 68%, passives/detractors - 63%), close to national and	Yes

[7] Key differences were identified by statistical tests or those pragmatic differences of more than 10% between promoters and passives/detractors.

Measure	Promoters and Passives/Detractors- Summary of Key Differences	Similar Results in Winter 2016?
	provincial parks (promoters - 64%, passives/detractors - 51%), hospitable people (promoters - 78%, passives/detractors - 59%), helpful/friendly front line staff (promoters - 64%, passives/detractors - 52%), and good value for money (promoters - 61%, passives/detractors - 37%).	
Trip Planning Sources	• There was no difference in trip planning resources between promoters and passives/detractors.	No
Social Media	• There was no difference in social media use between promoters and passives/detractors.	No
Visitor Information Services	• While in Golden, promoters were more likely to obtain visitor information about activities (promoters – 47%, passives/detractors – 33%). • Promoters were more likely to agree (4s or 5s on agreement scale) that visitor information services caused them to: stay longer in Golden (promoters - 15%, passives/detractors - 7%), spend more money than anticipated in Golden (promoters - 27%, passives/detractors - 14%) and increase their likelihood of return (promoters - 52%, passives/detractors - 42%). • Promoters were more likely (than passives/detractors) to state that during trips, they preferred to obtain visitor servicing information from talking to locals (promoters - 61%, passives/detractors - 49%) and talking to other visitors (promoters - 47%, passives/detractors - 34%). • Promoters were less likely (than passives/detractors) to state that during trips, they preferred to obtain visitor servicing information from people that work at tourism businesses (promoters - 31%, passives/detractors - 42%), local visitor information centres (promoters - 17%, passives/detractors - 35%) and in-vehicle GPS (promoters - 21%, passives/detractors - 35%).	Yes
Golden Experience Evaluation	• Promoters were more likely to give top-box ratings (4 or 5, on 1 – poor to 5 – excellent scale) for trip components asked about, which included: accommodation (promoters - 91%, passives/detractors - 58%), dining (promoters - 77%, passives/detractors - 49%), recreation and adventure (promoters - 97%, passives/detractors - 96%)[1], and the overall experience in Golden (promoters - 97%, passives/detractors - 80%). • Promoters were much more likely to state they were likely to return to Golden than passives/detractors (promoters - 100%, passives/detractors - 70%).	Yes

1. Due to many promoters rating adventure as 'excellent' (79%) compared to passives/detractors (54%).