

# ANNUAL REPORT 2019

A summary report of the activities of the Tourism Golden Association  
January 1<sup>st</sup> to December 31<sup>st</sup>, 2019

Key Reporting areas include Operations, Marketing, Visitor Services and Financials



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Submitted by: Joanne Sweeting, Executive Director  
Date: August 2020



#GOLDENRULES  
#GOLDENBC

[tourismgolden.com](http://tourismgolden.com)

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## About Tourism Golden

- ❑ Incorporated in 2006, Tourism Golden Association is a non-profit society mandated as the DMO and eligible entity until July 2022.
- ❑ The DMO area contains the Town of Golden and CSRD Area A, not including Yoho National Park.
- ❑ Representing 163 tourism stakeholders (accommodations, activity operators and attractions).
- ❑ Primarily funded by a 2% tax on eligible accommodation room nights, known as the Municipal and Regional District Tax (MRDT) leveraged with grant and 'pay to play' stakeholder co-op advertising sales.
- ❑ Governed by a board of 11 directors representing accommodations and tourism operators within the boundary and a seat for the Chamber of Commerce. The board establishes the vision, mission, and objectives of the organisation and approves the annual marketing plan and budgets. It ensures fiscal responsibility and fulfilment of the organisation's mission.

### Mandate

Tourism Golden Association will lead, direct, and manage destination marketing activities and support tourism development initiatives on behalf of Golden and Kicking Horse Country by maintaining a collaborative and inclusive industry driven organization, and by providing opportunities for stakeholders to increase revenues. We will provide a consistent voice for Golden and Kicking Horse Country in the tourism marketplace.

### Directors, Officers, Committees & Staff

#### Board of Directors May – Dec 2019

##### Elected

*Representing Town of Golden Accommodators*

Rav Soomal	Best Western Mountainview
Atma Sandher	Ponderosa Motor Inn
Treena Coney	Prestige Inn Golden

*Representing General Accommodators (all locations)*

Brandy Beliveau	Bellstar Hotels & Resort
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*Representing Area A Accommodators*

John Lush	Lush Mountain Accommodations
Lucille Hayward	Moberly Lodge
Joanne Best	Mount 7 Lodges

*Representing Tourism Operators*

Graeme Kreiner	Golden Golf Club
Magi Scallion	Golden Snowmobile Club
Toby Barrett	Kicking Horse Mountain Resort

##### Appointed

Shawn Bethune	Kicking Horse Chamber of Commerce
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##### Officers

President	Magi Scallion
Vice President	John Lush
Treasurer	Toby Barrett
Secretary	Rav Soomal

##### Committees

###### Finance Committee

*Magi Scallion, Treena Coney, Toby Barrett – Treasurer*

###### HR Committee

*Brandy Beliveau, Jo Best, Treena Coney*

###### Stakeholder Committee

*Atma Sandher, John Lush, Magi Scallion*

###### Governance (Constitution and Bylaw) Committee

*Magi Scallion, Atma Sandher, Toby Barrett, Lucille Hayward*

###### Visitor Services

*Rav Soomal, John Lush, Atma Sandher, Treena Coney*

###### RMI Committee - All board directors

##### Staff

Executive Director	Joanne Sweeting
Marketing & Administration	Rachel Wilde
Communications & Social Media	Andy Brown
Visitor Services Manager	Alycia Weir

## **DMO Business Objective,**

*“In a manner that is admired by all in the Canadian tourism industry, we will increase the economic impact of tourism in Golden and the surrounding area by growing revenues for businesses that serve tourists by 30% by 2021”*

### **Tourism Vision**

“We will inspire target visitors to explore and experience Golden”

### **Tourism Mission**

“We will market Golden as a destination of choice. By delivering innovative marketing initiatives we will increase economic benefits for all our stakeholders and for the community.

We will provide tools and guidance to assist our stakeholders in delivering remarkable visitor experiences.

We will provide information and education to inform and guide destination development.”

### **Values & Guiding Principles**

These are the principles by which Tourism Golden will operate:

- Balance resident values with visitor demand.
- Maintain a positive, respectful relationship with residents of Golden and Area A.
- Recognize the community as a blend of diverse unique resources working together to become a healthy, vibrant community in which to live and work.
- Advocate a social, environmental, and economic balance within the tourism industry and the community at large.
- Work collectively with the community to develop services to meet the needs of our visitors.
- Foster open and honest communication with all community stakeholders through a comprehensive communication plan.
- Be inclusive and transparent to the stakeholders and the community.
- Partner with existing organizations and stakeholders that contribute to tourism marketing and destination development.
- Leverage resources and maximize partnership potential.
- Be fiscally responsible and accountable to stakeholders.
- Advocate on behalf of the local tourism industry.

### **Strategic Objectives 2017 - 2021**

As identified in the 2017-2021 Strategic Business Plan, the Strategic Objectives of the organisation are to:

- 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 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 and for the overall importance of the tourism industry

## Executive Summary

2019 completed the 9th year of continued growth in tourism revenues<sup>1</sup> and was just 3% short of reaching the DMO business objective of increasing tourism revenues by 30% between 2017 and 2022.

Tourism is recognised as one of the primary industries in Golden. With the 2019 *Value of Tourism Study* we were able to define for the first time a direct contribution of **\$124.5 million in revenues**, representing 75% of gross business revenues, and **1,866 jobs** that tourism provides to the local economy. The Tourism Sentiment Index demonstrates the importance that tourism plays in driving a positive brand image of Golden and Area A, which results in attracting new residents and business investment. This study also confirmed **39,000+ online conversations** actively promoting Golden, which is a **39% increase** against the prior year in overall tourism conversation volume relating to Golden, demonstrating continued growth in awareness of Golden's tourism experience.

Our 2019 visitor study demonstrated a substantial increase in summer **NPS to 50.3** from 31 in 2017 (likely due to wildfire smoke in 2017). The top reasons cited for choosing Golden as a destination supports our efforts in establishing perceptions aligned with our brand positioning.

The study also shows that the percentage of visitors making an overnight stay increased from 77% to 84%, substantially achieving against that goal. Length of stay in summer decreased slightly from 2.8 nights to 2.5 nights but increased in winter from 3.2 nights to 3.5 nights.

We take our fiscal responsibilities seriously and are pleased to note that 75% of funds spent (excluding staff wages) were directed to tactical implementation of marketing activities.

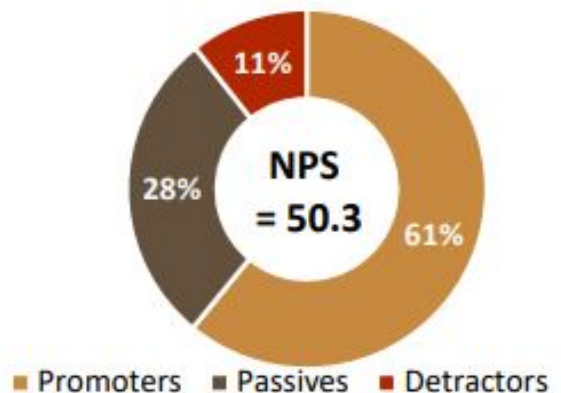
The strategic focus on marketing of the shoulder season and winter resulted in continued growth in accommodation revenues and occupancies in the months January to March, September and December. It should be noted, however, that the continued unfettered growth of STRs had a noticeable impact on high season occupancies and revenues in traditional hotels and motels.

<sup>1</sup> As indicated by MRDT revenues. See APPENDIX A

## Highlights

- ↑ Value of Tourism \$124 million direct revenue
- ↑ 9<sup>th</sup> year of growth in tourism revenues
- ↑ +18% MRDT & accommodation revenues
- ↑ Net Promoter Score 50.3 (up from 31.8)
- ↑ 84% of visitors stayed overnight (+7%)
- ↑ Average length of stay summer 2.5 nights
- ↑ Average length of stay winter 3.5 nights
- ↑ FWT event marketing value of \$1.5 million+

### Golden's Overall Net Promoter Score Percentage of Visitors<sup>FU, 1</sup>



We continued to develop our role as the lead organisation for tourism in Golden from a solely marketing focussed entity to one which advocates on matters of primary importance to our tourism industry and which plays a role in local and regional destination development. With no functioning economic development organisation, we took the lead in undertaking research on *The Economic Impact of labour Shortages in Golden* and the contributing issues. We were also pleased to continue to contribute to the Highway 1 and Kootenay Rockies Regional *Destination Development* working group.

*Collaboration* is important in leveraging our funds and assisting in creating compelling content and amplifying our voice through supporting provincial, regional and sector-specific campaigns, and other initiatives. Specifically, in 2019 we participated in DBC's AMP Stories pilot, which successfully rolled out in the fall of 2019 and, through serving customised content, helps us to reach qualified audiences through the DBC and partner platforms that would otherwise be beyond our reach. AMP is also another tool that supports our website SEO ranking.

We continued to participate in the DBC Open Pool Marketing Co-op program with several CDMOs and sector organisations on campaigns for mountain biking, Nordic skiing, and snowmobiling. Additionally, we successfully applied to the program as the lead organisation for a new campaign '*The Golden Triangle*'. In collaboration with Parks Canada (Yoho and Kootenay), Radium Hot Springs and the Village of Radium, this campaign launched in July 2020 and aims to raise awareness of the destinations, parks and experiences beyond Banff Lake Louise, whilst at the same time providing information on the Kicking Horse Canyon Phase 4 project and compelling reasons to motivate travel.

RCR and Tourism Golden once again collaborated to confirm Kicking Horse Mountain Resort and Golden as the *host for the Freeride World Tour* in February 2019. Recognising the value of professional events such as the FWT led us to working with the Town of Golden to include an event hosting program in the RMI Strategy 2019 – 2022, with the objective of encouraging the growth of new and existing tourism events by supporting eligible local hosting expenses, reducing the pressure on a handful of accommodations and other businesses to continuously provide free or heavily discounted services and thereby contributing a true value to the local economy.

As always, we continued to engage with our own tourism stakeholders to offer print and digital co-op marketing opportunities and were grateful for the support of our stakeholders in hosting media visits which resulted in an astounding *56 earned media features* in target publications and media channels. We provided two professional development workshops to our stakeholders on Digital Marketing and LGBTQ+ Inclusion and supported a KRT Grow with Google workshop.

The Tourism Golden website is one of our primary marketing assets. In response to the increased number of mobile device users visiting tourismgolden.com we launched the 'mobile-first' revamp of the website in February 2019 which resulted in an incredible increase of 125% against the prior 12 months in mobile users visiting the website.

Tourism Golden strives to be an *inclusive destination* and to that we end we completed three key projects:

1. The launch of three language versions of the website (French, German, and simple Chinese),
2. The inclusion of indigenous nations' stories in the Golden Travel Planner and on tourismgolden.com,
3. A stakeholder workshop on LGBTQ+ Inclusion.

We recognize these factors that make our success possible:

1. The *MRDT program* which provides reliable multi-year funding for tourism marketing and projects.
2. The focus of Tourism Golden staff and board on *strategic planning informed by research and data*.
3. Tourism Golden stakeholders who invest and innovate in products and experiences, engage with us in collectively promoting Golden and support our efforts in content creation and media relations.
4. The Town of Golden and CSRD Area A who support our position and efforts as the eligible entity and lead organisation for tourism.
5. Destination BC and Destination Canada who continue to *innovate in tourism marketing and industry programs*, opportunities and partnerships as well as delivering successful provincial marketing campaigns.
6. Ministry of Tourism, Arts and Culture's *Tourism Events Program* which provided funding for the Freeride World Tour.
7. The *RMI program* which provides funding for the Event Hosting Co-op program under a contribution agreement with the Town of Golden.

## Situational Context

### Tourism Trends & Influences

International arrivals grew by 4% in 2019 and continued to outpace the global economy.<sup>2</sup>

*“2019: Another record-breaking year for Canada”  
with 22.1 million overnight arrivals tourists*<sup>3</sup>

International air arrivals into Canada grew 6% with the largest growth from the US, Mexico, China, and India.

British Columbia saw growth of 2.6% in international arrivals with European markets increasing by 3.6%, Asia Pacific 1.5% and overnight arrivals from the US by 2.6%.<sup>4</sup>

2019 was the first full calendar year in which the PST/MRDT legislation recognised STRs and online platforms such as Airbnb. In Golden, an additional 28 STR accommodations were registered as eligible to directly collect and remit taxes. The contribution of OAP (collected and remitted by online platforms) amounted to 17% of the gross MRDT. This provides a baseline to monitor the growth of STRs and their contribution into our local tourism economy. It should be noted that the gross Core MRDT for Golden grew by only 2%.

### Economic & Political Influences

The strength of the US Dollar continued to support increased interest from the US to Canada.

### Social & Consumer Trends

The [Golden Visitor Study](#) undertaken in winter 2018/19 and summer 2019 continue to demonstrate the strong demand for STRs and its influence in destination selection.

### Disrupters

The [2019 Economic Impacts of Labour Market Challenges in Golden, BC](#) study determined that 46% of tourism-related businesses experienced labour market challenges, rising to 84% in the summer season. The direct impact on business revenues were estimated at \$6.6 million, but the impacts were far-reaching not only in missed business opportunities but also on customer and service experience and employee and management burnout.

<sup>2</sup> Source: [UNWTO World Tourism Barometer](#)

<sup>3</sup> Source: [DestinationCanada.com](#)

## Operational Summary

### Stakeholder and Industry Relations

We maintained strong stakeholder communications with the AGM in May and an informal gathering in November in addition to a monthly newsletter and ad-hoc eblasts.

We launched a stakeholder co-op photo shoot in summer to assist stakeholders in creating high quality assets for their own marketing.

We continued to offer co-op marketing opportunities in our own and 3<sup>rd</sup> party publications.

As usual, the 2018 annual report was presented to the Golden Town Council and at the Columbia Shuswap Regional District board meeting.

As a member of the RMI committee we worked with the Town of Golden to inform the 2019 -2022 Resort Development Strategy.

Tourism Golden annually sponsors the Hospitality Award at the Chamber of Commerce Business Excellence Awards gala.

Letters were provided to several organisations in support of projects including an economic development strategy, events, trail infrastructure and environmental stewardship.

Relationships and collaboration with other community, regional and provincial DMOs and tourism stakeholders developed through participation in the DBC Co-op Marketing Program and Destination Development working groups as well as the BCDMOA meetings and TIABC industry conference.

### Advocacy

The organisation represents the interests of the tourism industry and local tourism stakeholders, and was active in the following matters:

#### Short Term Rentals

In 2019, Tourism Golden continued to advocate for a level playing field in municipal and BC Assessment property tax legislation.

<sup>4</sup> Source: [DestinationBC.ca](#)

## Labour Shortages

With funding from the Government of Canada and the Province of British Columbia the Columbia Basin Trust we initiated the study on labour market challenges in fall 2019. The report was shared with relevant community organisations as well as local, regional, and provincial government to inform future strategies.

## Kicking Horse Canyon Phase 4 Community Liaison

With the impending project, we were pleased to be actively involved in the Community Liaison Committee to represent the tourism sector and to strongly advocate for traffic management planning that would have the least amount of impact on our stakeholder businesses during the winter and summer peak seasons.

## Visitor Information Services

At the outset of transitioning to community-focussed Visitor Information services led by Tourism Golden we have been focussed on a multi-channel approach that visitors can access information how, when and where they want. This included digital kiosks located in accommodations and multiple wi-fi hotspots to provide access to the Tourism Golden website enhanced with options for customising content and trip planning tools to create individual itineraries. The traditional face-to-face service at the Golden Visitor Centre in the summer months is supported by year-round phone and social media responses.

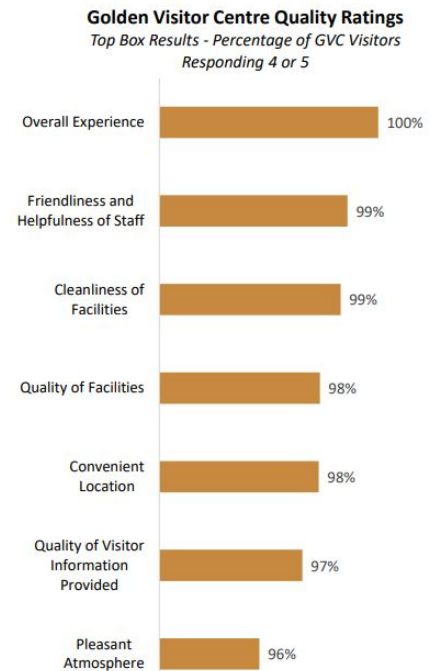
In 2019, we extended the face-to-face outreach during the summer by attending the weekly Golden Farmers Market and launching phase 1 of the *Ambassador strategy* which places trained volunteers from the local community into key locations in the downtown during the summer high season.

The new 'Saturday Showcase' program provided local and regional organisations the opportunity to educate visitors and locals on the environmental, wildlife, backcountry safety and local activities and services.

We installed an additional wi-fi hotspot at the Golden Civic Centre and were excited to launch the localised versions of the website translated into French, German, and Chinese.

We are proud of the high level of service quality which is evident in the ratings and *2019 NPS for the Golden Visitor Centre of 57.7* which exceeds the destination NPS of 50.3.

Site-specific research revealed *a 100% satisfaction* with overall experience at the site, beating the 2017 score of 97%.



We appreciate the support of Destination BC and the Town of Golden as we strive to continually provide exceptional community visitor information services. The collaboration is justified by the estimated *incremental economic benefit of \$9.9 million* generated by the Golden Visitor Centre. <sup>5</sup>



<sup>5</sup> Source: [2019 Golden Summer Visitor Survey](#)



## Marketing Summary

The primary function of Tourism Golden is to market Golden as a tourism destination of choice. The 2017-2021 Strategic Business Plan and the 2018 Marketing Plan collectively identify the marketing objectives, target markets, marketing strategies and budgeted spend per strategy.

The 2019 Marketing and tactical plan remained focused on our brand essence “Authentic Adventure” and core activity markets and EQ segments and the key pillars identified in the 5-year Strategic Plan.

The total spends on destination Marketing and Promotion, including research, was **\$612,083**, which represents **75% of expenditures**. This does not include staff wages and benefits. As measured by the Ministry of Finance, staff wages related directly to the delivery of marketing and tourism projects are deemed a marketing expense, and in that determination Marketing and Promotion spend represents 94% of total expenses.

We continued to ensure that our marketing efforts are coordinated and complementary to the provincial and regional strategic plans throughout our planning process. Through the DBC Co-op Marketing program we participated with regional community DMOs and activity sector associations on the following campaigns:

- Kootenay Dirt mountain biking
- KootenayXC Nordic ski
- Sled Kootenay
- Fishing BC

### Media Relations

Throughout the year Tourism Golden hosted many travel media and social influencers as well as attending the Destination Canada Go Media event which provides highly valuable access to qualified international media.

We earned **56 features** in qualified print and online publications that directly resulted from our own PR activity, and more through supporting DBC and KRT media trips.

Earned media highlights include:

- A **6-page feature on Golden** in *American Angler Magazine*
- Full page feature in the *Globe & Mail*
- Multiple features in the *Calgary Herald*

- Features in *Destination I Do* and *Perfect Wedding Mag*
- Columbia Wetlands feature in the *Vancouver Sun*
- Lonely Planet Germany* Mini Guides
- Get Lost Magazine
- Explore Magazine*, print and online multiple features
- Multiple features in association with FWT event
- Pinkbike.com
- Freeskier Magazine*
- Multiple influencer posts and blogs

### Content & Asset Creation

We continued to build assets and campaigns for the successful “Heart of the Parks” campaign with the addition of a new edit featuring Kootenay National Park, postponed from 2018 due to wildfire smoke.

We created the *Locals Lowdown*, a series of short videos featuring local activity and community ambassadors. The series was launched in 2020.

In partnership with FishingBC and Hooké our first fishing video was created and distributed to a qualified audience sector audience.

Supported by wildfire recovery funding from KRT and DBC Co-op program via Mountain Biking BC new destination and mountain biking videos were produced.

User generated Content (UGC) continues to play a large role in giving access to inspirational content for our social media platforms and quality images for other marketing activity. Using the Crowdriff User Generated Content platform gave us access to **949,000 social assets** and **843 rights approved assets**: an invaluable addition to our social media and marketing activity.

### Advertising

Our paid advertising strategy is a multi-channel approach across print, digital, search, social media and, on occasion where incorporated into a multi-channel package, other mediums such as large format video screens. Where possible, we utilised our advertising spend to leverage earned media as evidenced in the following activity in 2018:

- Explore print and digital and the Outdoor Discovery Map inserted into the subscription box Gearbox
- Horizon Magazine (large format video in Toronto & Times Square NY plus print inserts into Toronto Star and Wall Street Journal California issue)
- Toronto International Film Festival large video screens

Digital, social campaigns and the Google Search grant resulted in a 288% increase in website visits generated through paid campaigns.

Get Lost Magazine

**check in** **you wish**

# Lupine Scheme

Take a walk on the wild side in British Columbia, with a grey wolf trailing closely behind.

Words and photography by Anna Karstoft

**T**HE ENTRANCE TO THE SMALL GREEN BIODE that is HOME to the Northern Lights Wolf Centre is covered in the skulls and antlers of Canadian Rockies elk, moose, and sheep. The centre is in the nearby mountain town of Golden, not far from the town of Kamloops. It's a beautiful place, and I'm not fully prepared to an experience for which I'm not fully prepared.

We're going for a walk with wolves, and I've assumed enough. Game of Thrones to wonder whether I'll have to adopt a Yorkshire account to ensure the world's largest wolf centre (and I'm not talking about the centre) was established in 2002 when Casey, a former Hollywood canine trainer, and Shirley Black decided to educate people about the majestic wolves and the important role they play in the environment. They started with just one wolf, but now have a pack of seven that live in a 5,000-acre wolf enclosure.

A chorus of howls adds a backing soundtrack to Shirley's warnings as she prepares us for what's to come. "It's important to remember we're on wolf territory. Thankfully, the wolves, which have been bred and raised in captivity, are used to the presence of humans. As a result, they act more like dogs than wild animals."

A woman is attached to young human Florin, who is being held by his mother and is looking into the back. Florin is looking at Shirley. Florin's yellow eyes peering through the back window. She has a pale complexion, but this is a 4.5-hour drive with the wrong to take down a car.

It's a combination of the heart-stopping scenery and majestic nature of the long-legged creature peering beside me that makes me want to pitch myself through the party. Florin disappears from my view for a moment as she goes to the back of the car, and I catch down next to a glass case snapping photographs, she starts running towards me. Florin before me, wearing Shirley's words, "Always stand taller than the wolf." I don't realize Casey is holding a treat, which is what has Florin's attention, but before he says, "Don't panic." The wolf and I moved well out of her way.

With my heart pounding, we continue. I'm still unsure of my relationship with Florin. She's not let me pet her, nor has she sniffed my feet as a human dog would. Shirley instructs me to stand next to a log, and I edge. Within moments, Florin has jumped up on it and has her tongue along my face, leaving a trail of saliva. It's the most action I've had on this trip to Canada and, seeing the remains of her sticky saliva, I'm no longer left wondering whether I'm friend or foe.

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American Angler Magazine

# "KOKE ADDICTS"

IN GOLDEN, BRITISH COLUMBIA, LOOKING FOR A STEEL-HEAD SLUNT DOUBLE.

BY GREG THOMAS

**IT WAS EARLY, MAYBE 6 A.M., AND DARK, WITH SLEET FALLING** steadily, when Dave Burns's F-150 slogged through the mud puddles and pulled up to my rental cabin.

This was morning one of a three-day hunt for British Columbia bull trout, and as I put on a rain jacket and handed over gear, Burns told me exactly what I didn't want to hear: "It's been nested this fall."

"Nested" meant that Burns, a fishing guide based in Golden, British Columbia, who goes by the handle "the Golden Gillet," hadn't found those bulls in the numbers or sites he expected when we first discussed this trip several months earlier. At that time he was confident we'd find a slew of big bulls in the upper Columbia River and its major tributaries, fish following kokanee salmon out of the 166-mile-long Kootenai Lake, both possibly ranging toward 20 pounds. Burns said we could bring streamers off two-hand rods for those bulls, but as an angler might when fishing coastal steelhead, I thought about that momentarily and asked myself a question: With many Pacific Northwest steelhead runs in major decline, and river closures keeping anglers off the water in some places, could targeting far inland bull trout be the new steelhead game?

www.americanangler.com

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**LOGISTICS**

WHILE Golden and the upper Columbia River are located in western British Columbia, in the heart of the Rockies, BPOC isn't just any paddler's destination. It's a remote area, and it's not just the weather that makes it a challenge. The river and its tributaries are full of big fish that may peak 20 pounds or more. A variety of permits are required, including white streamers and specific lake access permits with gear checks and wildlife biologists. Booking tips are a must because bulls don't feed on the water. Spring, fall and fall fishing tips, maps and handbooks work well.

**OTHER ACTIVITIES** There are a great many trails, offering nice views and plenty of good restaurants. It's a beautiful area with a lot of history and a lot of scenic views. It's a beautiful area with a lot of history and a lot of scenic views. It's a beautiful area with a lot of history and a lot of scenic views.

**LOOKING** Kaituma Falls is a great place to stop. It's close to the water, comfortable, and offers outstanding views of the river. It's a beautiful area with a lot of history and a lot of scenic views.

**MORE INFO** Check out more about Golden and downland guides and trips at [www.getlostmagazine.com](http://www.getlostmagazine.com).

The author landed this great fish, which weighed 19 pounds, with help from a local guide (below). Photographs in this article are by Greg Thomas.

www.americanangler.com

## Consumer Relations & Shows

The monthly consumer news continued to deliver an above industry average open rate of 15%. We continue to engage and converse with consumers through social platforms and digital channels such as Google Business.

With the ability to connect with consumers at many more digital and social touchpoints (and those activities make it easier for us to accurately measure return on investment) we have reduced the number of consumer shows that we attend. However, we do continue to attend the two shows that are aimed at our primary audiences and help us achieve our objectives.

In collaboration with the Golden Snowmobile Club we attended the snowmobile show in Edmonton in October. In spring we attended the Calgary Outdoor Adventure Show.

## Marketing Collateral

In addition to the annual publications of the Golden Travel Planner, Hiking, Biking and Outdoor Discovery Maps we launched localised language versions of the website in the fall, resulting in increased visits in French, German and Chinese languages up to 128% against the prior year.

The Key Performance Indicators report on pages 13 and 14 summarise strategic performance against specific targets outlined in the 2018 Marketing Plan.

## Events

The Golden 24 Mountain Bike race operated by Transrockies successfully held the event for the fourth year with strong participant numbers.



2019 was the second Freeride World Tour event hosted at with KHMR. As shown in *Figure 2* the event delivered over **\$1.5 million of marketing value** and demonstrated significant increase in impressions compared to the 2018 event to a highly qualified global audience.



## FWT KICKING HORSE GOLDEN BC

TOTAL KICKING HORSE GOLDEN BC AUDIENCE: **15.2Mio**  
{TV + VIDEO VIEWS}

TOTAL ADJUSTED MEDIA VALUE: **1.04Mio€ (1.56Mio \$CAD) \*\***  
{TV VALUATION + SOCIAL MEDIA VALUATION}

**3.5 Mio VIDEO VIEWS**  
+45 % vs 2018

**NEWS** **411 MEDIA CLIPPINGS**  
+45,3 % vs 2018

**Live** **610 K LIVE + REPLAY**  
+38 % vs 2018

**GLOBE** **92.7 K PAGES VIEWS**  
+98 % vs 2018

**1536 HOURS TV BROADCAST \***

**11.7MIO CUMMULATED AUDIENCE (NIELSEN) \***

## Research

We are committed to informing and measuring our activity with research and proven data by regularly undertaking visitor and other data research.

2019 was a busy year for research projects as we conducted winter and summer visitor studies and the Labour Shortages Economic Impact Study which also incorporated the Value of Tourism report.

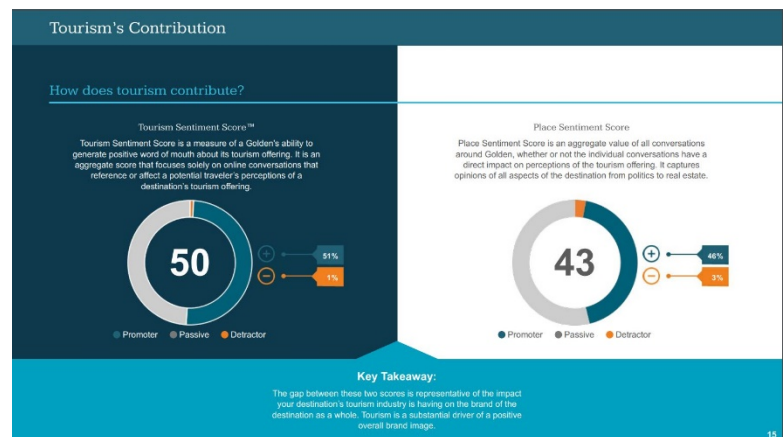
The seasonal visitor studies confirmed that we are successful in marketing to our identified audiences, both geographic and contextual. Destination perception and experience measures alongside the primary motivator in choosing Golden as a destination also show that we are creating perceptions of Golden in line with our brand and destination experience, resulting in a positive net promoter score and satisfaction level.

For the first time we were able to produce an in-depth [Value of Tourism Report](#) which confirmed the value of tourism in direct revenues as \$124.5 million and 1,866 jobs (equivalent to 1,392 full-time jobs). Given the continued growth in short term rentals and the impact, particularly during summer high season, on hotel and motel revenues it is of note that in 2019 Golden's *hotels and motels generated 88% of accommodation revenues*, whilst *short term rentals generated 8%*. Knowing that the inventory of STRs exceeds 600 and traditional accommodations is 1300, the importance of levelling the playing field to support traditional accommodations that contribute significantly more revenue and jobs becomes even more clear.

Combining data in the visitor studies with the Value of Tourism Report clearly shows us that in terms of volume and average expenditure our strategy of identifying Alberta and the US as primary markets should continue.

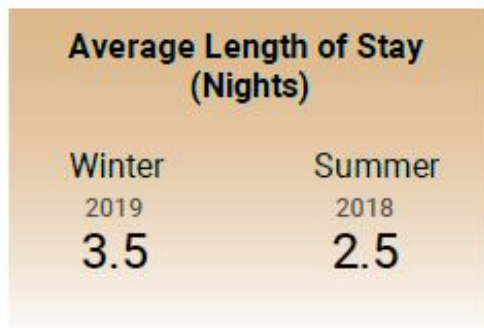
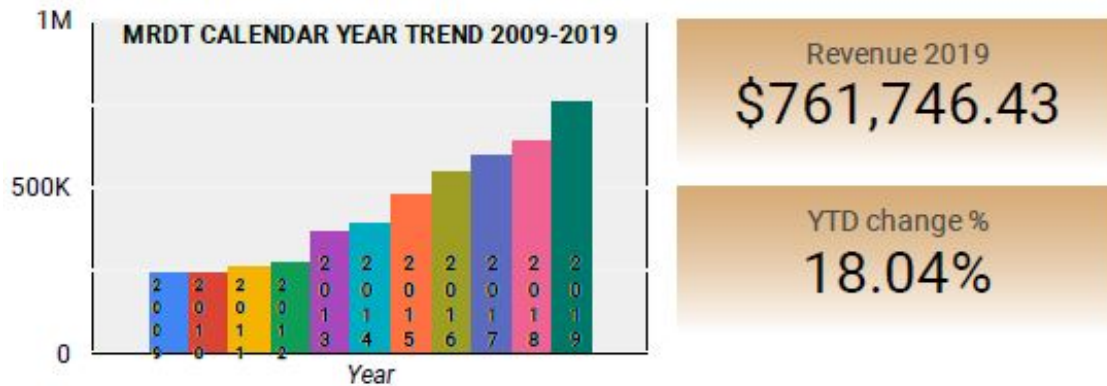
The [Tourism Sentiment Index](#) by Destination Think! is an index that measures the online sentiment of a destination and *what people really feel and find worthy of sharing* about a destination through capturing word of mouth and peer to peer conversations. We see this as a complement to our traditional face-to-face intercept studies and the work of the Destination Development groups led by DBC, and one which captures a source of information that we may otherwise miss.

In 2019, the second year of this research we were pleased to see *39,000+ online conversations actively promoting Golden representing a 39%* increase on the prior year. This demonstrates increased awareness and visitation. Additionally, we see that tourism is a substantial driver of a positive image of the Town. This study dives into how our destination tourism assets perform against a comparative set of destinations. This will help to inform identify weaknesses as well as strengths and assists in informing existing and new businesses on product and service development.



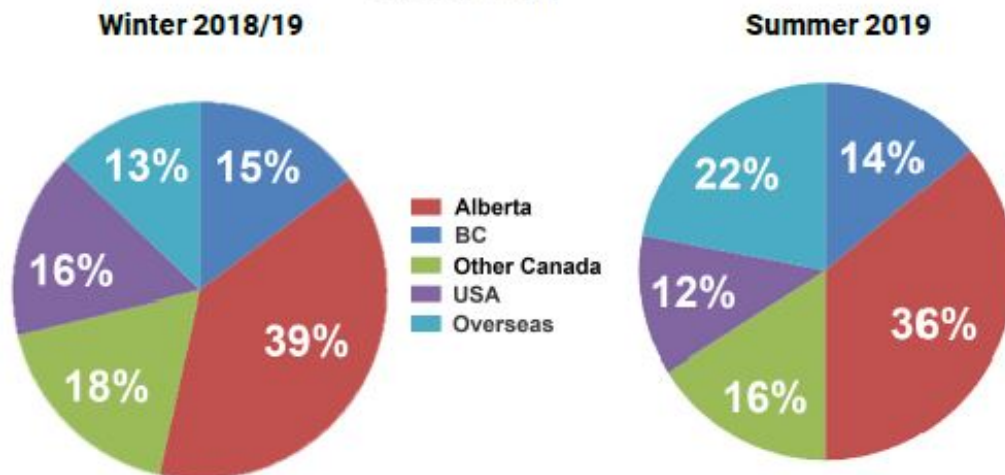
## Key Performance Indicators

### MRDT REVENUES



### TARGET MARKET PENETRATION

Market Origin



### PUBLIC & MEDIA RELATIONS



## SOCIAL MEDIA

  
Instagram Followers  
**83,000**

  
Facebook Fans  
**15,000**

  
Twitter Followers  
**2,700**

  
Video Views  
**14,314**

Instagram Engagement  
**83,000**

Facebook Engagement  
**25,400**

Twitter Engagement  
**1,745**

## WEBSITE ANALYTICS

Jan 1, 2019 - Dec 31, 2019



Unique Users  
**333,927**  
↑ 64.8%

Organic Searches  
**125,106**  
↑ 4.7%

Digital Campaigns  
**246,630**  
↑ 288.5%

Web Visits:  
**463,446**  
↑ 73.1%



All Activities Page Views  
**391,868**  
↑ 38.2%

### Top 5 Country of Origin by Visit

Country	Sessions	% Δ
Canada	257,500	33.7% ↑
United States	167,764	264.5% ↑
United Kingdom	8,717	25.7% ↑
Australia	4,824	10.3% ↑
India	3,239	221.3% ↑

### Content Drill down/Page views

Activity	Page Views	% Δ
Biking	24,102	23.9% ↑
Fishing	14,483	21.0% ↑
Heli & Cat Skiing	3,377	21.0% ↑
Hiking	76,854	375.7% ↑
Other	46,243	299.6% ↑
Parks	7,981	-63.8% ↓
Rafting	11,740	14.2% ↑
Ski Touring	3,135	28.0% ↑

## The Value of Tourism in Golden

The 2019 Value of Tourism Study was undertaken as part of the Labour Market study. It confirmed our previous assumptions that over \$100 million - \$124.5 million to be exact – in direct tourism revenue is generated to tourism-related businesses. For the first time, however, we are also able to determine the number of jobs created by the tourism industry in Golden as well as the GDP and tax revenues.

### Success in Target Markets

Success in reaching the identified markets with our marketing efforts is demonstrated in the 2019 winter and summer visitor studies which support the primary geographic origin and travel motivation of visitors as per our identified markets and audiences.

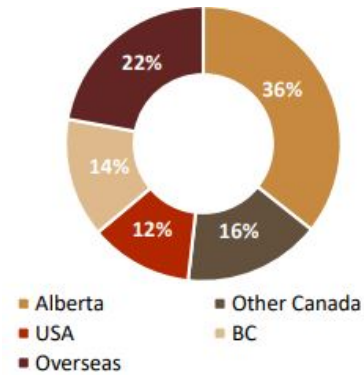
Canadian visitors originate primarily from Alberta, BC, and Ontario. International visitors are primarily from the USA states of Washington and California followed Colorado and Texas, depending on the season. European countries UK, Germany, and Switzerland.

Primary motivators for a summer visit, aside being a convenient place to stop, were family vacation, sightseeing, nature, and wildlife, visiting national parks, mountain biking, and VFR. <sup>6</sup>

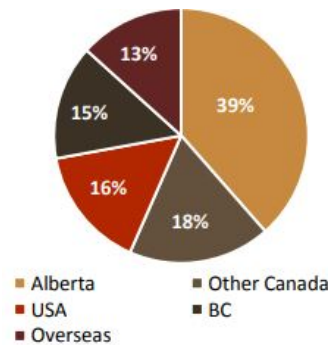
Over 70% of visitors cited friendly, hospitable people, small town charm, access to outdoor activities and close to nature, wilderness, and national parks in line with our brand essence of Authentic Adventure and the identified key selling propositions that drive our marketing campaigns, these being “Surrounded by national & provincial parks, Authentic mountain Community and World-class adventure activities.”

In winter 66% cited resort skiing at KHMR as their primary reason for visit.

Visitor Market Origin Summer 2019



Visitor Market Origin Winter 2019



<sup>6</sup> Source: Golden Summer Visitor Study 2019



## 2019 VALUE OF TOURISM IN GOLDEN BRITISH COLUMBIA

Golden's tourism industry contributes significant economic benefits to the Golden area and the rest of BC.

<b>285</b> Tourism-Related Businesses <sup>2</sup>	<b>\$124.5 million</b> direct tourism revenues collected by tourism-related businesses in 2019. <sup>1</sup>	On average, <b>75%</b> of gross business revenues <sup>7</sup> are generated from tourism
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**In 2019, the Golden tourism industry generated:<sup>3,4</sup>**  
**\$87.8 million** in GDP   **\$174 million** in domestic output   **\$34.5 million** in tax revenue

<p><b>2019 Tourism Revenues</b> (\$124.5 million)</p> <table border="1"> <tr><td>Paid Accommodation</td><td>35%</td></tr> <tr><td>Food &amp; Beverage</td><td>29%</td></tr> <tr><td>Outdoor Recreation</td><td>26%</td></tr> <tr><td>Transportation</td><td>5%</td></tr> <tr><td>Retail/Shopping</td><td>3%</td></tr> <tr><td>Attractions</td><td>1%</td></tr> <tr><td>Other Services</td><td>1%</td></tr> </table>	Paid Accommodation	35%	Food & Beverage	29%	Outdoor Recreation	26%	Transportation	5%	Retail/Shopping	3%	Attractions	1%	Other Services	1%	<p><b>Employment</b></p> <p style="text-align: center;"><b>1,866</b> Jobs</p> <p style="text-align: center;"><b>1,392</b> Full-Time Equivalents</p>	<p><b>2019 Tax Revenue Paid</b> (\$34.5 million)</p> <table border="1"> <tr><td>Federal</td><td>50%</td></tr> <tr><td>Provincial</td><td>39%</td></tr> <tr><td>Municipal</td><td>11%</td></tr> </table>	Federal	50%	Provincial	39%	Municipal	11%
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Municipal	11%																					

**Average summer visitor party expenditures in Golden:<sup>5</sup> \$606**  
 BC Visitor = **\$415**   Alberta Visitor = **\$576**   US Visitor = **\$670**   Overseas Visitor = **\$720**

<p><b>2019 Labour Income<sup>6</sup></b> (\$61.7 million)</p> <table border="1"> <tr><td>Wages and Salaries</td><td>72%</td></tr> <tr><td>Mixed Income</td><td>19%</td></tr> <tr><td>Social Contributions</td><td>9%</td></tr> </table>	Wages and Salaries	72%	Mixed Income	19%	Social Contributions	9%	<p><b>\$350</b> in average client expenditure at tourism-related business.</p> <p><b>\$496,130</b> average tourism revenues in 2019 for Golden tourism-related businesses.</p>	<p><b>\$44.5 million</b> in revenues generated from paid accommodation.</p> <p><b>88%</b> from hotel/motels <b>8%</b> from short-term rentals. <b>4%</b> from campgrounds</p>
Wages and Salaries	72%							
Mixed Income	19%							
Social Contributions	9%							

Notes/Sources: All economic impact data are from the Tourism Golden report entitled 2019 Tourism Economic Benefits and Labour Market Challenges Research in Golden, British Columbia and is available from Tourism Golden.  
 1. Tourism revenues are monies collected from tourism-related businesses and discounted for the percentage of revenues collected from visitors (on average this was 75%).  
 2. Tourism-related businesses are defined as any business that provides services to visitors and operates in the Golden and Kicking Horse Country, British Columbia.  
 3. GDP is Gross Domestic Product and is measured at basic prices. It is defined as the value added to the economy by tourism activities. The cost of supplies and services used to produce goods or services are subtracted from total revenue.  
 4. Domestic output is equal to tourism spending minus consumer taxes.  
 5. Visitor spending data is available in the report entitled Summer 2019 Golden Visitor Survey Results and is available from Tourism Golden.  
 6. Mixed income is income derived from unincorporated businesses/sole proprietorships while social contributions are payments made by employers for the benefit of their employees including registered private and public sector pension plans, the Canada and Quebec pension plans, the Employment Insurance Fund, workers' compensation funds, health and life insurance plans, and retirement allowances.  
 7. Of tourism-related businesses (see number 2 above).





## Financial Summary

The primary source of revenue for Tourism Golden is the 2% Municipal and Regional District tax (MRDT) which provided 82% of the organisation’s funding in 2019. This was leveraged with co-operative advertising sales to tourism stakeholders on a ‘pay-to-play’ basis, and by grant or partner funds for projects.

The overall revenue for the organisation (excluding visitor services) grew by 26% primarily due to an 18% increase in MRDT revenues and grant funding for the labour market research project and RMI event hosting program.

## Highlights

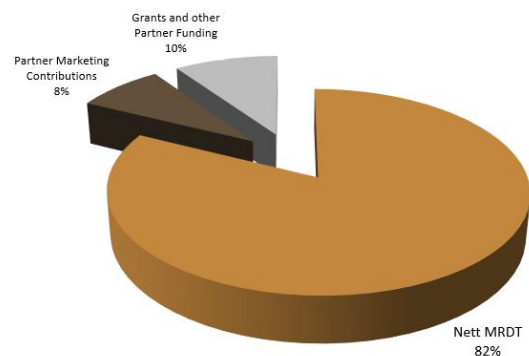
- ↑ 26% increase in total revenues
- ↑ 18% increase in MRDT tax revenues
- ↑ 75% of spend on tactical marketing activity

### 2019 FY ORGANISATIONAL EXPENSES



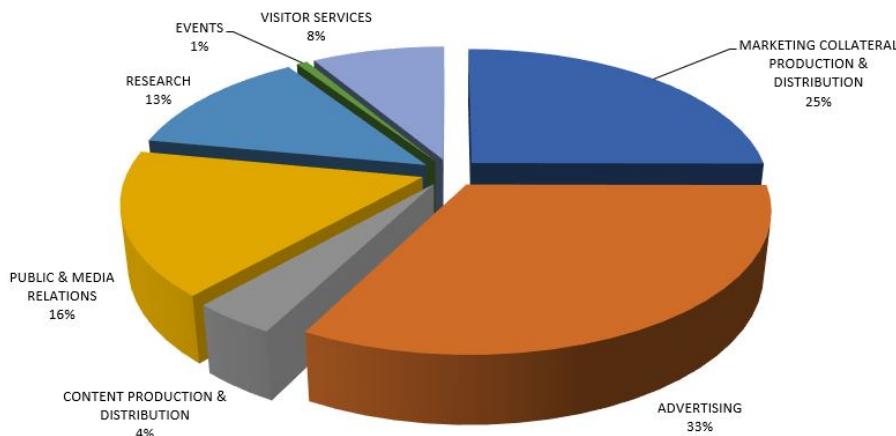
Marketing and Promotion tactical activity spend was \$612,083, which represents 75%<sup>7</sup> of expenditures. The Ministry of Finance determines that staff wages related to the delivery of marketing and tourism projects are deemed a marketing expense, and in that determination Marketing and Promotion spend would represent 94% of total expenses.

### 2019 FY Revenue Sources



Financial statements produced by Cox & Co. and approved by the Tourism Golden Finance Committee and Board of Directors are available on request to Tourism Golden members.

### 2019 FY MARKETING SPEND BY STRATEGY



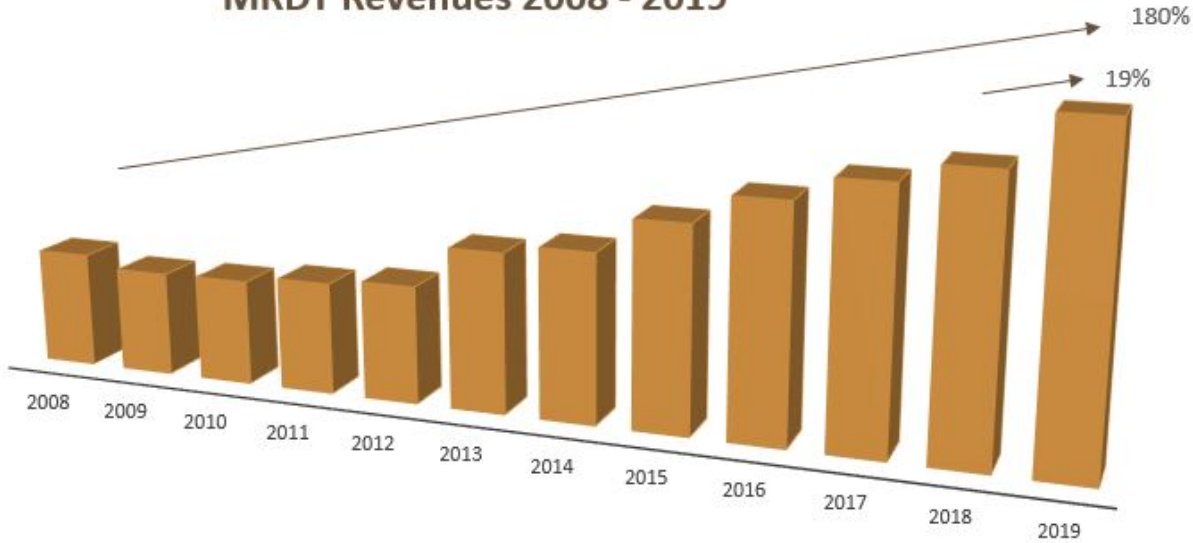
## Visitor Services

For clarity, the visitor services accounts and operational budget are reported separately. The 5-year service agreement with Destination BC, includes annual funding. In 2019, year 3 of the agreement, Destination BC and Tourism Golden both contributed \$50,000.

<sup>7</sup> When MRDT admin fees are deducted from total expenses.

APPENDIX A

MRDT Revenues 2008 - 2019



2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
\$271,790	\$244,632	\$246,621	\$262,247	\$275,700	\$373,994	\$394,722	\$476,925	\$544,210	\$599,102	\$641,893	\$761,746