



Golden Visitors

Summer 2015 Visitor Survey Results – FINAL Report

Submitted to:

Joanne Sweeting
Executive Director, Tourism Golden
Golden, BC
250-439-1111
manager@tourismgolden.com

Submitted by:

Krista Morten
Principal, Align Consulting
Kamloops, BC
250-510-1490
Krista.Morten@alignresearch.ca



EXECUTIVE SUMMARY

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 stay and explore Golden and Kicking Horse Country and to increase the economic impact of tourism in a manner that is admired by all in the Canadian tourism industry.* The 2014-2015 Tourism Golden marketing plan outlines the research strategy goals as:

1. Produce visitor data research reports for use by Tourism Golden and the Town of Golden,
2. Analysis of annual and seasonal data, and
3. Provide a capacity with which to evaluate the effectiveness and to demonstrate the success of marketing activity.

To fulfill the research strategy, to date, TG has conducted visitor surveys in 2013, 2014, and 2015. In fall 2015, Align Consulting was hired to reduce TG staff workloads and provide professional marketing research services throughout 2016. Two visitor surveys are planned for 2016, one for the winter season (this report) and another for the peak summer season.

A total of 1,308 people were approached to participate in the survey. Of those, 864 people (66%) agreed to participate, 255 were screened out because they were locals, vacation home property owners, were staying in Golden for longer than 30 days, were under 19 or had already completed the survey. This left 609 completed surveys and of those, 136 agreed to participate in the follow up survey. Unfortunately, only 14 visitors responded to the follow-up survey - the low sample size prevented analysis of the follow-up data.

Results

Visitor Characteristics

- In 2015, almost three-quarters Golden visitors were from Canada, 38% from Alberta, 20% from BC and 14% from other provinces in Canada (other Canada). Visitors from overseas (OVS) accounted for 18% of visitors. Of those, 75% were from Europe, 22% were from the Asia Pacific (including Australia and New Zealand) and 3% were from other international countries. Overall, 10% of visitors were from the United States.
- The majority of overseas visitors were from Europe (74%), followed by visitors from Asia/Pacific (19%) and other international countries (7%). Two thirds of visitors from the Asia Pacific were from Australia or New Zealand (66%). European visitors were from the United Kingdom (27%), Germany (25%), the Netherlands (17%) and Switzerland (10%).
- More than a third (36%) of other Canadian visitors (from outside BC and Alberta) were from Ontario, followed by Saskatchewan (25%), Quebec (16%) and Manitoba (10%). Fewer were from New Brunswick (5%), Nova Scotia (4%), Newfoundland (2%), the Yukon (1%) and PEI (1%).
- Overall, 10% of visitors were from the United States. Of those, 13% were from California, 10% were from Texas, 8% were from Washington, 7% were from Arizona, Colorado (7%), Montana (7%) or Utah (7%), while 5% were from Oregon, Florida (5%) or New York (5%).

- Overall, 51% of on-site survey respondents were female and 49% were male.
- There was a fairly even distribution of age among Golden summer visitors: 26% were between 45-54 years old, 20% were between 35-and 44 years old, 19% were between 55-64 years old. Fewer were older than 65 years (8%) or under 25 years old (6%).

Trip Characteristics

- Just over half (52%) of summer visitors were on their first trip to Golden while the remaining 48% were repeat visitors.
- Visitors were asked, *What is the primary reason for your visit to Golden?* One-third of were in Golden while on route to another destination (31%), while a quarter of visitors were in Golden to visit with friends and relatives including family vacation or other family events. Sixteen percent were visiting to participate in outdoor recreation activities while fewer (11%) visited for general sightseeing or relaxation, to get married or attend a wedding (8%) or to visit nearby National Parks (3%) or KHMR (2%).
 - Of the one-quarter of visitors that were in Golden for family and friends related reasons (other than weddings) – more than half responded they were on a family vacation (55%), while a 43% were visiting friends and family and 2% were attending a reunion.
 - Of those that visited to participate in outdoor recreation activities (16% overall), almost half mountain biked (42%) while another 17% participated in a mountain bike race. Thus, the majority (59%) of outdoor recreation visitors were in to mountain bike.¹ Fewer visited to hike (15%), whitewater raft (15%), golf (6%) or camp (2%). Other outdoor recreation activities included riding an ATV, a baseball tournament or ‘several activities’.
- Approximately 40% of Golden visitors were travelling with their spouse/partner, 27% were travelling with family including children and 14% were travelling with friends. Fewer were travelling on their own (9%), with an organized leisure tour group (1%) or with business associates (1%).
- More than half (59%) of Golden visitors were away from home for at least 7 nights. Thirty-percent were on trips that were longer than 14 nights. Another quarter of visitors were on trips of 2-3 nights (13% - 2 nights, 9% - 3 nights). On average Golden visitors were away from home for 8.5 nights.
- As expected, the length of stay in Golden was much shorter than overall trip length. The majority stayed overnight (76%) while 24% were day visitors. The average length of stay was 2.4 nights. Most overnight visitors (64%) stayed 1 or 2 nights. When the average time in Golden is calculated as a percent of overall trip length the result is 28%.
- Overnight visitors in Golden stayed in a variety of locations. Twenty-eight percent stayed at KHMR, another 28% stayed at an accommodation property in Golden adjacent to Highway 1. Slightly fewer (22%) stayed in downtown Golden while another 22% stayed in the Front Country (including Blaeberry Valley/Columbia Valley or Golden west). The kind of accommodation was also diverse: 40% stayed in a hotel/motel, 15% at a condo/self-catering hotel room, 14% stayed at a campground, and 13% stayed at friends or relatives. Fewer stayed at a bed and breakfast (7%), a cabin or chalet (4%), vacation home (4%), hostel (2%) or backcountry lodge (<1%).

¹ If calculated as a percentage of all visitors (and not just the percentage of those there for outdoor recreation) this equals 9%.

- Three-quarters of visitors came to Golden via private vehicle (76%) and another 22% got to Golden via rental vehicle. Much fewer visitors came via tour bus (1%), Greyhound bus or shuttle bus (<1%).
- On average, visitors participated in 4.7 activities while in Golden. The vast majority of visitors ate in a local restaurant (80%), while fewer shopped locally for gifts or clothing (39%), bought gas (38%), shopped for groceries (36%), hiked around Golden/KHMR (35%), visited the kicking horse pedestrian bridge (34%), visited the farmers market (30%), went to a pub or bar (29%) or visited the grizzly bear refuge at KHMR (28%). Less than a fifth of people visited the Golden art gallery (16%) hiked in the nearby national parks (16%), mountain biked (14%), walked/cycled on the Rotary Trails (12%) or participated in white water rafting (10%).
- On average, visitors spent \$142/visitor party/day. Most spent under \$150/visitor party/day (71%). A quarter spent \$100 and \$149 (24%), while another quarter spent \$50-\$99 (25%) and 22% spent under \$50 (22%).

Trip Planning

- Almost three-quarters (73%) of Golden visitors were aware of Golden before their visit. The remaining 27% responded they were not aware of Golden before planning their trip.
- Visitors had a wide array of un-prompted responses when they were asked what they knew about Golden. Almost all responses were positive (98%).
 - The most popular positive responses were they knew Golden for it's skiing/snowboarding (23%), that it was in a good location to stop (23%) or that they had been there before/used to live there or family lives there (20%). Fewer mentioned the beautiful scenery (11%), mountain biking (8%), KHMR (7%) while 7% mentioned it was a nice, quiet small mountain town. Interestingly, almost half of unprompted awareness responses were related to outdoor recreation activities (43%; 23%- skiing, 8% - mtn. biking, 5% - white water rafting, 3% - outdoor activities, 2% - hiking, 1% - snowmobiling, 1% - hang-gliding/paragliding).
 - In terms of the 2% of negative responses, only 1% mentioned the strip on Highway 1 was unappealing and had expensive gas, 1% said Golden was an industrial town and another 1% mentioned they think of bad roads/weather/difficult driving.
- When prompted about awareness sources, the most common response was 'I have always known about Golden' (46%). About a third of visitors responded they were aware of Golden through word of mouth (34%) while fewer learned about Golden through an internet search (16%) because their family used to live in Golden (7%) while 6% of visitors stated they were aware of Golden through highway signage. Five percent of visitors were aware through highway billboard advertising (5%), through specialist activity websites or publications (5%), the Golden Travel Planner (5%) or other tourism literature and tour operator itinerary or brochures (5%).
- Golden visitors were also asked what kinds of information sources they used to plan their trip. Almost half of visitors didn't conduct any research when planning their trip (42%). The second most popular information source was online search engines (36%), followed by KHMR website (20%), word of mouth referrals (18%), TripAdvisor (12%), the Tourism Golden website (12%) and the BCVC (11%).

Experience Evaluation

- Almost half of visitors (44%) replied they would definitely visit Golden again. Another third (31%) indicated they would probably visit Golden again. Only 20% were somewhat likely and another 6% were not at all likely to visit Golden again.
 - Overall, the top 5 comments about their likelihood of visiting again, were that Golden was their usual place to visit on a journey somewhere else (16%), Golden was a beautiful little town (14%), they had friends and family in the area (12%), they were not sure when they would get back (9%) and they would be back to ski/snowboard (8%).
- Similar to the likelihood of visiting Golden again, almost half (43%) replied that they would definitely recommend Golden as a vacation destination. Another third (33%) indicated they would probably recommend Golden as a vacation destination. Eighteen percent were somewhat likely and 6% were not at all likely to recommend Golden as a vacation destination.
 - Overall, 21% of visitors stated they would recommend Golden because of the location and the variety of activities people could participate in, 16% they would recommend or had already done so (but did not say why), 11% replied they scenery/wildlife/mountains were the basis of their recommendation and 10% indicated they would recommend to outdoorsy people. Four percent of visitors stated they would recommend Golden for its skiing or because of the community spirit (4%).
- More than a third of visitors (34%) replied that Golden exceeded their expectations while 52% replied that Golden met their expectations. Fourteen percent of visitors were unsure if Golden met their expectations as they had just started their visit. Less than one percent replied that Golden did not meet their expectations.
 - Overall, the most popular reason for giving experience ratings was that they had fun or a good visit and they like the area (26%). Others mentioned they had a good experience at a specific business (e.g. hotel or restaurant) or the BCVC. Some mentioned they didn't know yet as they had just arrived in town (16%) while 8% indicated it was a nice town/they felt at home/hidden gem. Interestingly, the most popular response (22%) of those visitors that replied that Golden exceeded their expectation was because they had a good experience at an individual business (e.g. a hotel, restaurant or the BCVC). This result reveals the importance of great customer service on the overall experience that Golden has to offer.

Key Insights

- Short-haul, rubber-tire visitors (from BC and Alberta) equal 58% of the summer visitors to Golden and confirms the main markets identified in the Golden's 2014-15 marketing plan.
- Golden's current brand position – the Authentic Outdoor Explorer, is also supported by this research, including these findings:
 - The top primary reasons for visiting Golden were:
 - On-route to another destination (31%),
 - Friends and family related travel (25%),
 - Outdoor recreation activities (16%),
 - Sightseeing/general relaxation (11%), and

- Getting married/attending a wedding (8%).
- Open-ended responses for awareness and experience evaluation resulted in definite themes about visitor perceptions of Golden. They include:
 - Golden is often a traditional stop on a longer journey,
 - KHMR is a key feature that attracts visitors to Golden,
 - Golden is a scenic, un-spoiled, small mountain town with friendly people and vibrant community spirit,
 - Golden is a great location to access outdoor activities in the surrounding land,
 - Key outdoor activities are skiing/snowboarding, mountain biking, hiking, river rafting and golf.
- Visitors were asked what they knew about Golden, and almost half of unprompted² responses were related to outdoor recreation activities (e.g. skiing/snowboarding, mountain biking, hiking etc.). This demonstrates the top of mind awareness about Golden is about outdoor activities. Fewer (23%) of visitors stated it was a good place to stop. Only a few visitors mentioned they thought of Golden as an industrial town (1%) or the 'trains' (2%).
- Of people that visited to participate in outdoor recreation activities (16% overall), almost half mountain biked (42%) while another 17% participated in a mountain bike race.³ Thus, the majority (59%) of outdoor recreation visitors were in to mountain bike. Also, mountain biking seems to be gaining importance to Golden visitors (7% primary reason in 2015, 6% in 2014 and 4% in 2013 - although not significant increases).
- There are continued opportunities to attract visitors to stay longer in Golden, which is supported by:
 - A large number of visitors mentioned they have a tradition of stopping in Golden on their journey to somewhere else,
 - The perception of Golden as a great stop-over location, and
 - A third of visitors stay near Highway 1 for one night. Further, among visitors that stayed near Highway 1, the average percentage of time spent in Golden (of total trip length) was 19% which was much lower than other accommodation locations (40% - Front Country/Blaeberry Valley, 42% - downtown Golden, 43% - KHMR).
- Analysis by key market and accommodation location revealed these key insights:
 - As expected, when compared to visitors from BC and Alberta, American and overseas visitors were:
 - On longer trips,
 - More likely to be on their first trip to Golden,
 - More likely to stay overnight somewhere other than near Highway 1, and
 - Less likely to definitely return to Golden,
 - Interestingly, American visitors (18%) were less likely to be travelling with children than overseas visitors (29%),
 - On average, overseas visitors spent the most (\$181/visitor party/day, average - \$142/visitor party/day)
 - Visitors from BC and Alberta were similar except that:

² Meaning no list was presented.

³ This equals 9% of overall visitors.

- BC visitors were on longer trips away from home,
 - BC visitors were less likely to stay at KHMR but more likely to stay in downtown Golden,
 - BC visitors were less likely to visit the Farmers Market than visitors from Alberta,
 - BC visitors were more likely to state they knew about Golden because they had been there before (23% - BC, 14% Alberta), or that it was a good location to stop (31% - BC, 23% Alberta),
 - BC visitors were less likely to state they were aware of Golden from an Internet search (14% - BC, 21% Alberta), and
 - BC visitors were much less likely to definitely return to Golden (49% - BC, 62% Alberta) or definitely recommend Golden (49% - BC, 62% - Alberta).
- Visitors that stay in Golden near Highway 1 only stay for one night and participate in few activities. Visitors that stay overnight in other locations stay longer and participate in more activities.
 - Visitors that stay at KHMR spend (\$181/visitor party/day) more than those that stayed at other locations (overall average is \$142/visitor party/day),
 - Visitors that stay at KHMR are more likely to be in or attending a wedding, which is particularly true for visitors from Alberta and BC,
 - Visitors that stay longer and participate in more activities (at locations other than Highway 1) are more likely to return to Golden, recommend Golden and have their expectations exceeded.
- Word-of-mouth is gaining importance as both an awareness source and as a source of trip planning information when compared among years. This reflects results of other visitor services research that finds that word of mouth recommendations (in person or online) are gaining in importance. This is most likely because visitors place more importance on personal connections due to the great variety and abundance of trip planning information sources available to travellers.
 - A third (34%) of visitors responded that their visit to Golden exceeded their expectations. When asked why they gave that rating, the most popular response (22%) was that they had a good experience at an individual business (e.g. a hotel, restaurant or the BCVC). This supports the importance of great customer service/visitor servicing has on the overall experience in Golden. This is particularly important as word of mouth as both an awareness and information source gains importance in trip planning activities.

TABLE OF CONTENTS

Executive Summary	2
Table of Contents	8
1.0. Introduction	9
2.0. Methodology	10
2.1. Data Collection.....	10
2.2. Data Analysis.....	11
3.0. Results	13
3.1. Visitor Characteristics	13
3.2. Trip Characteristics	15
3.3. Trip Planning	19
3.4. Evaluation of Golden Tourism Experiences	21
3.5. Market Summary	24
3.6. Accommodation Location Summary.....	29
3.7. Annual Summary.....	34
4. Key Insights	35
Appendix A. Origin, Accommodation and Yearly Summary	39
Appendix B. Questionnaire.....	58
Appendix C. Alberta Origin Communities	65

Front Cover Photo:

Description: The Kicking Horse River flows through the Canadian Rocky Mountains to Golden BC and is renowned for some of the best whitewater rafting in western Canada. Take a scenic float through the upper Kicking Horse Canyon or brave the wild whitewater of the lower Kicking Horse Canyon. Either way you will enjoy a great rafting experience and breathtaking scenery of the Canadian Rocky Mountains.

Credit: Tourism Golden Website. <http://www.tourismgolden.com/about/photos/whitewater-rafting-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 stay and explore Golden and Kicking Horse Country and to increase the economic impact of tourism in a manner that is admired by all in the Canadian tourism industry.*

To realize the vision, Tourism Golden has developed the following key marketing objectives:⁴

1. Establish perceptions of Golden consistent with our brand positioning,
2. Increase awareness of Golden as a great place to vacation,
3. Increase nightly visiting and length of stay,
4. Increase funding for the DMO and increase TG membership and revenue, and
5. Maintain TG's position as the lead organization for tourism in the area.

In addition, the research strategy 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 2014-2015 Tourism Golden marketing plan outlines the research strategy goals as:

1. Produce visitor data research reports for use by Tourism Golden and the Town of Golden,
2. Analysis of annual and seasonal data, and
3. Provide a capacity with which to evaluate the effectiveness and to demonstrate the success of marketing activity.

To fulfill the research strategy goal, to date, TG has conducted visitor surveys in 2013, 2014, 2015 and now 2016. In fall 2015, Align Consulting was hired to reduce TG staff workloads and provide professional marketing research services throughout 2016. This marks the first report that Align Consulting has authored on behalf of TG.

⁴ Request for Proposal for Provision of Destination Tourism Market Research Services. June 2015. Tourism Golden.

2.0. METHODOLOGY

2.1. Data Collection

TG employed two paid researchers to conduct a visitor survey in the summer of 2015. The researchers worked for 32 days between July 1 and August 31, 2015. The researchers approached visitors at a variety of locations around Golden, including 2 hotels, the British Columbia Visitor Centre at Golden (BCVC), downtown Golden, the Golden Farmers Market and the Kicking Horse Mountain Resort (KHMR). The on-site survey was about 8 minutes long and terminated with the request to participate in an online follow-up survey.

A total of 1,308 people were approached to participate in the survey. Of those, 864 people (66%) agreed to participate, 255 were screened out because they were locals, vacation home property owners, were staying in Golden for longer than 30 days, were under 19 or had already completed the survey. This left 609 completed surveys and of those, 136 agreed to participate in the follow up survey.

Unfortunately, only 14 visitors responded to the follow-up survey - the low sample size prevented analysis of the follow-up data.

Location	People Approached	Agreed to Complete Survey	Number of:			
			< 19 or Already Surveyed	Locals, Property Owners or Seasonal Visitors	Completed Surveys	Agree to Follow-Up
BCVC	162	76	4	8	64	9 (13%)
Downtown Golden	296	217	10	68	139	27 (17%)
Farmers Market	173	138	1	61	76	24 (27%)
Highway 1 Corridor	236	115	1	26	88	16 (16%)
KHMR	440	317	4	72	241	59 (21%)
Other ¹	1	1	0	0	1	1 (100%)
Total	1,308 (100%)	864 (66%)	20 (2%)	235 (27%)	609 (70%)	136 (22%)

1. One survey was noted as from another location – Blaeberry Valley.
2. BCVC is the BC Visitor Centre which is funded by Destination British Columbia.

2.2. Data Analysis

Golden visitors were described using simple percentages (frequencies) and averages calculated from the survey data. Open-ended (textual) responses were grouped into categories and summarized with percentages.

In addition to an overall analysis of survey data, key differences in survey responses were summarized by:

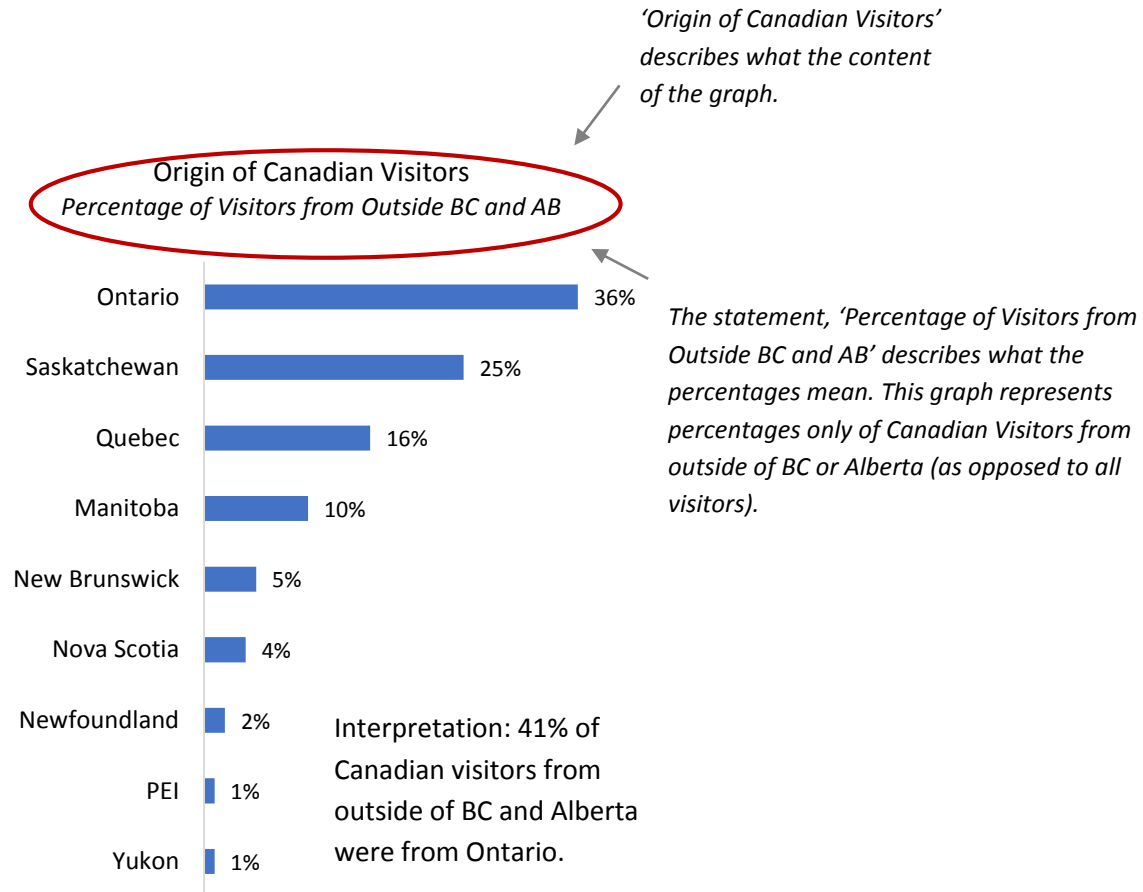
1. Market– section 3.5. Summarizes differences in visitors from BC, Alberta, other Canadian provinces, the USA and overseas,
2. Accommodation location– section 3.6. Summarizes differences in visitors that stayed overnight in the Front Country/Blaeberry Valley, in Golden on Highway 1, downtown Golden and KHMR, and
3. Annual results – section 3.7. Summarizes differences in visitors that visited Golden 2015, compared with 2013 and 2014.

Key differences were identified by statistical tests and/or pragmatic differences. This means that differences were identified between analysis categories (e.g. BC and Alberta visitors) when percentages differed by 10% or more.

Visitor expenditures were collected in categories. To calculate average expenditures, a middle value was assigned to each of those categories. For example, respondents that spent between \$150 and \$199 were assigned a middle value of \$175. Average expenditures were then calculated using these middle values.

Visitor length of stay was also collected in categories for those staying between 7 and 13 nights and 14 nights plus. To calculate average length of stay a middle value of '10' was assigned to the 7 -13 nights category and a value of 14 was assigned to the 14 nights plus category. Day visitors were assigned a value of 0.5. Average length of stay was then calculated using these values.

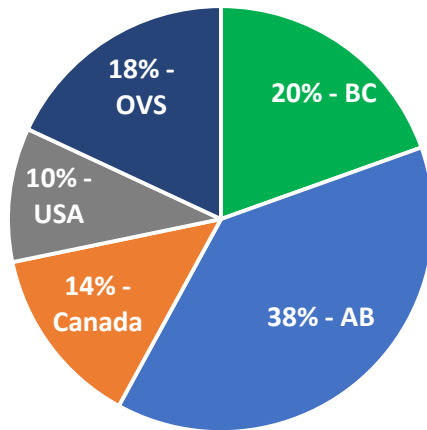
2.3. Tips for Reading Results



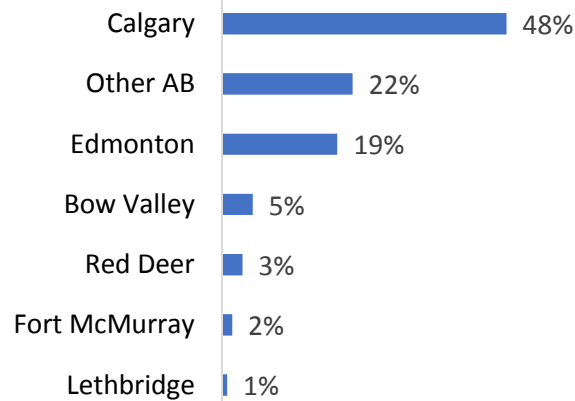
3.0. RESULTS

3.1. Visitor Characteristics

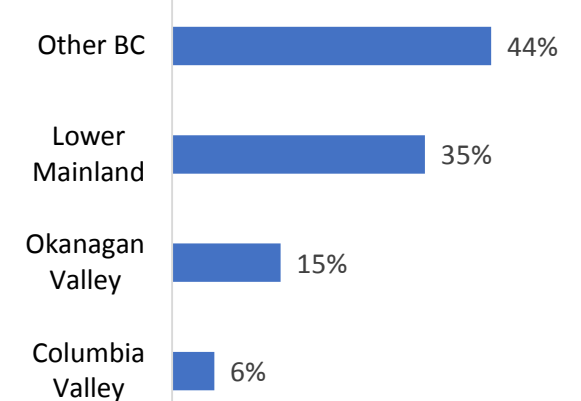
Origin of Visitors
Percentage of Visitors



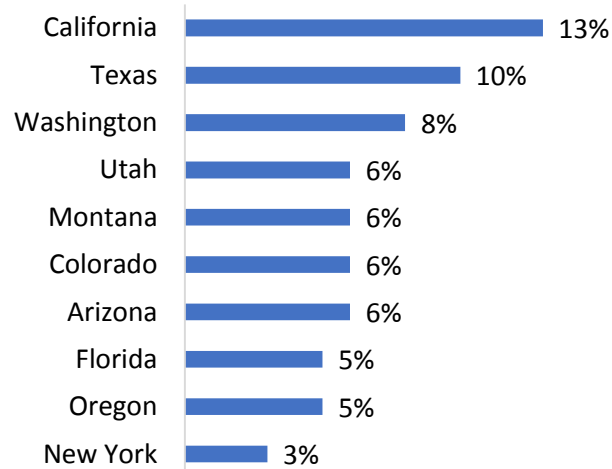
Origin of Visitors from Alberta
Percentage of Visitors from Alberta



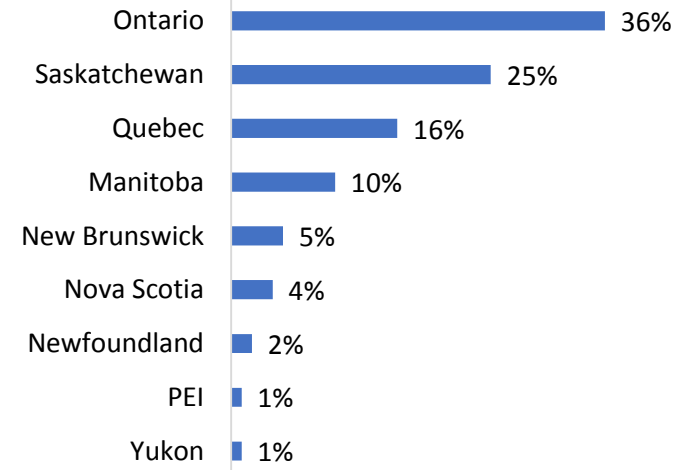
Origin of Visitors from BC
Percentage of British Columbians



Origin of American Visitors (Top 10)¹
Percentage of American Visitors

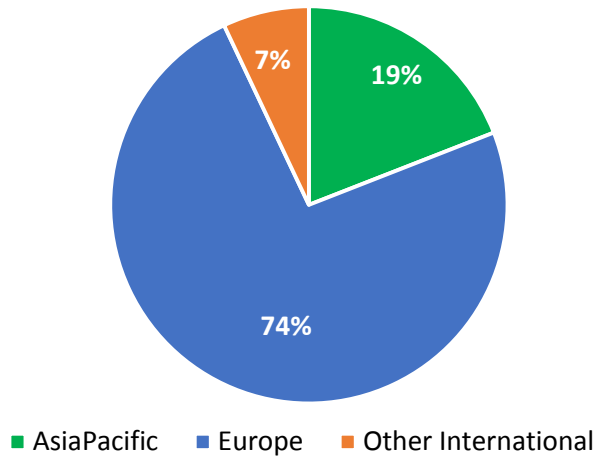


Origin of Canadian Visitors
Percentage of Visitors from Outside BC and AB

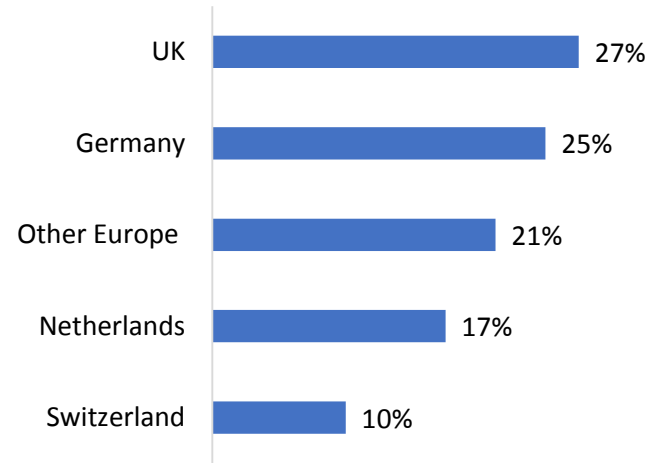


1. The remaining 29% were from other US states including, Indiana, Wisconsin, New Jersey, Vermont, Missouri, North Carolina, Pennsylvania, Tennessee, Virginia, Nevada, Illinois, Idaho, Ohio, New Jersey, Connecticut, Georgia and North Dakota.

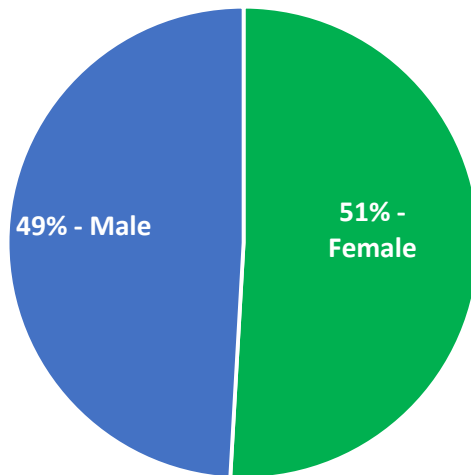
Overseas Visitor Origin
Percentage of Overseas Visitors



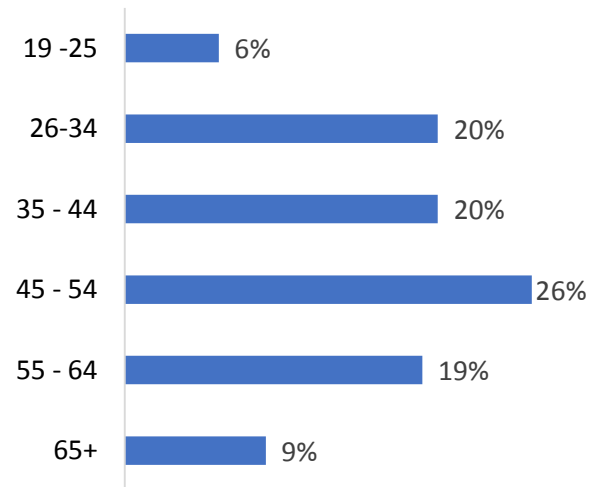
Origin of European Visitors
Percentage of European Visitors



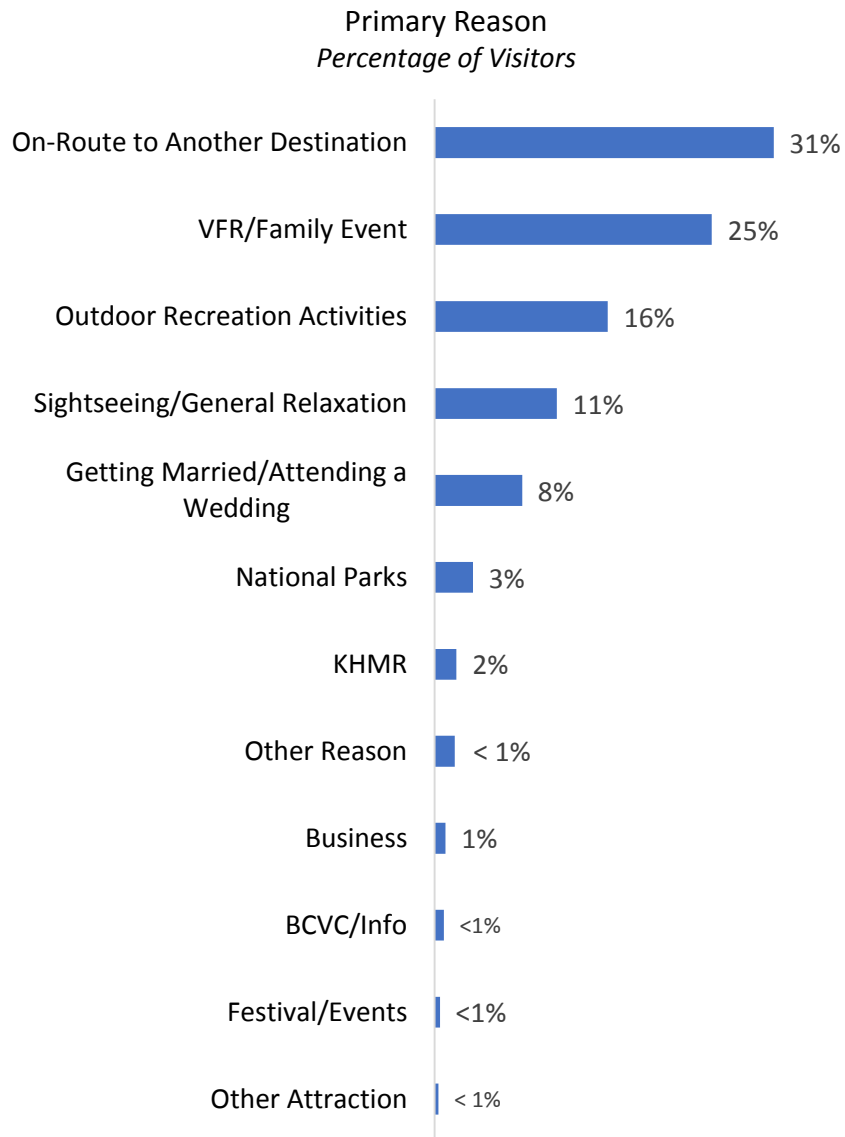
Gender
Percentage of Visitors



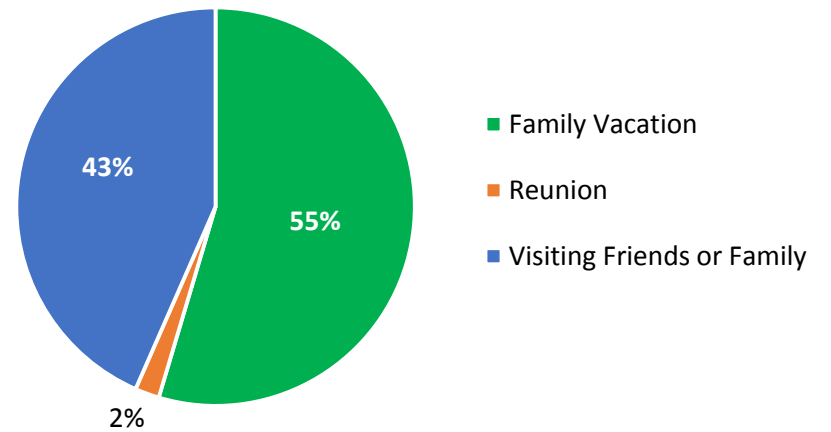
Age
Percentage of Visitors



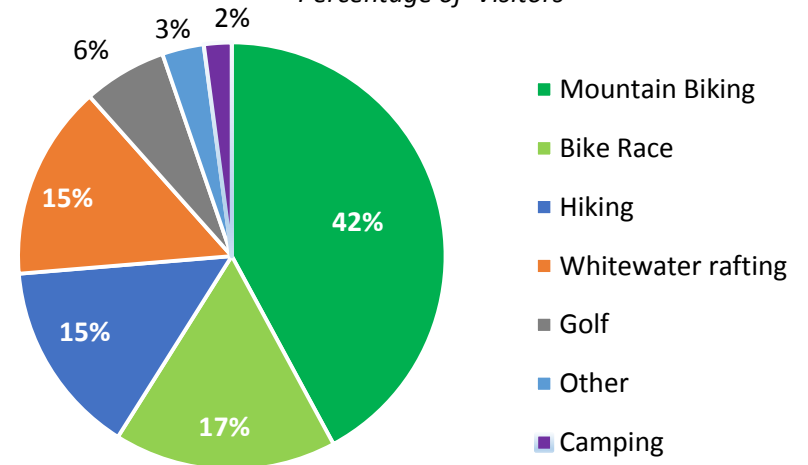
3.2. Trip Characteristics



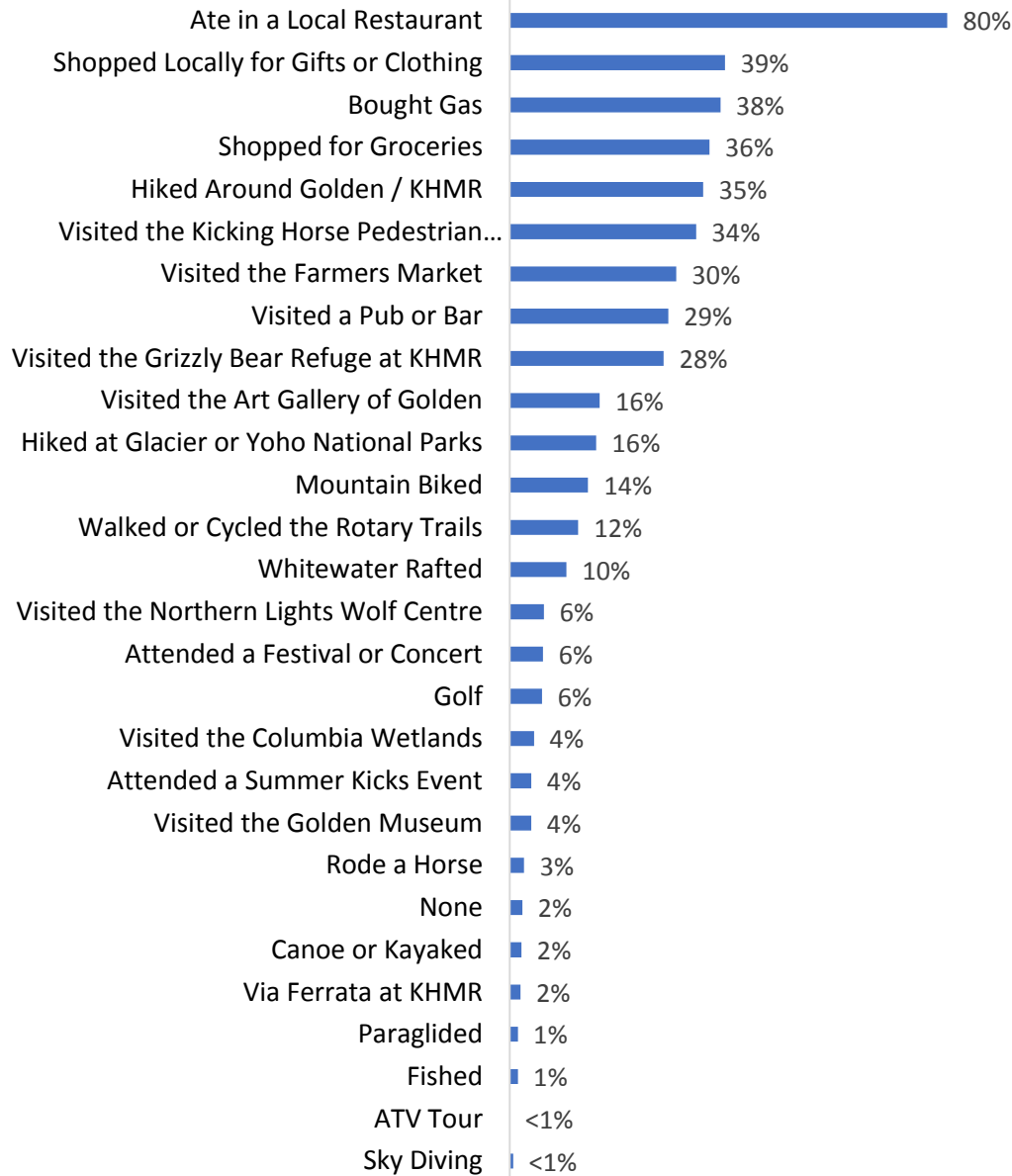
Family/Friends Related Reasons for Visiting Golden
Percentage of Visitors



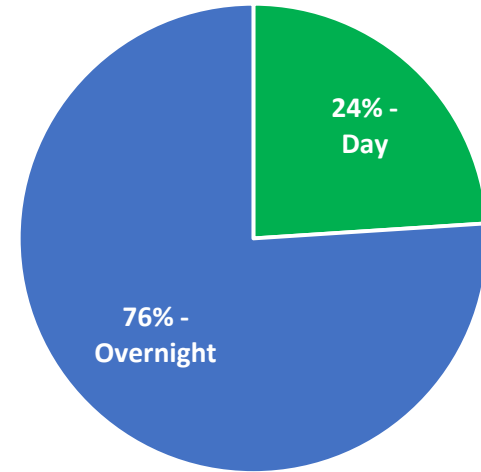
Outdoor Recreation Activities Reasons for Visiting Golden
Percentage of Visitors



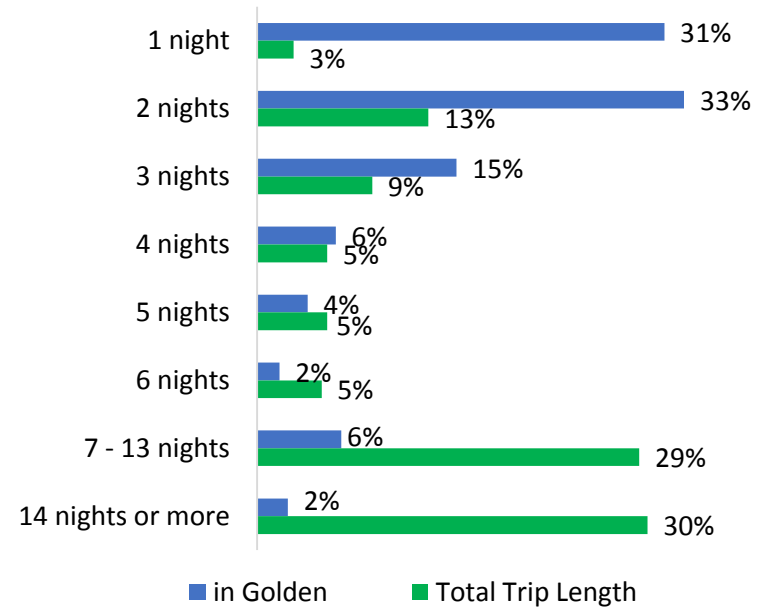
Activity Participation
Percentage of Visitors



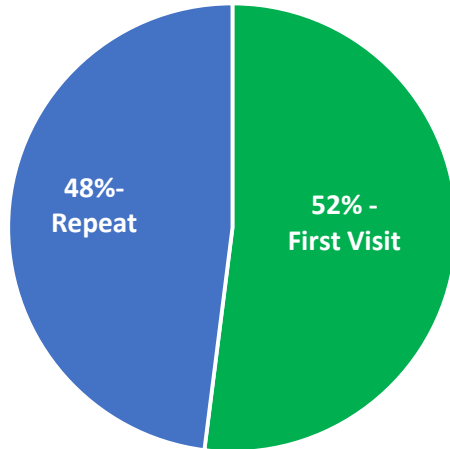
Length of Stay in Golden
Percentage of Visitors



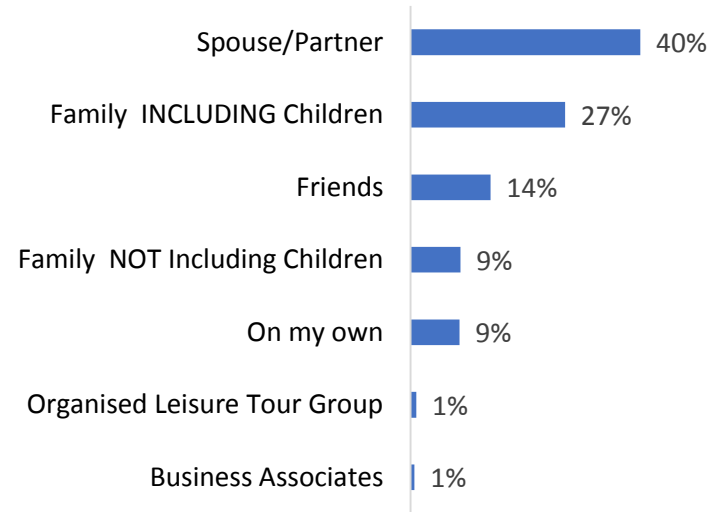
Nights Away From Home and in Golden
Percentage of Overnight Visitors



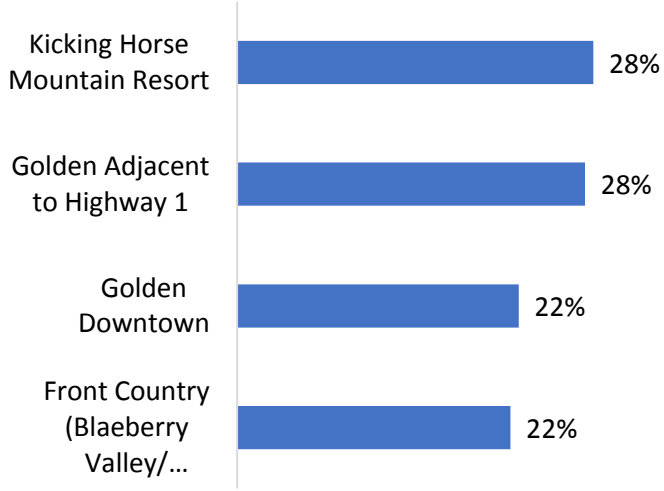
Been to Golden Before?
Percentage of Visitors



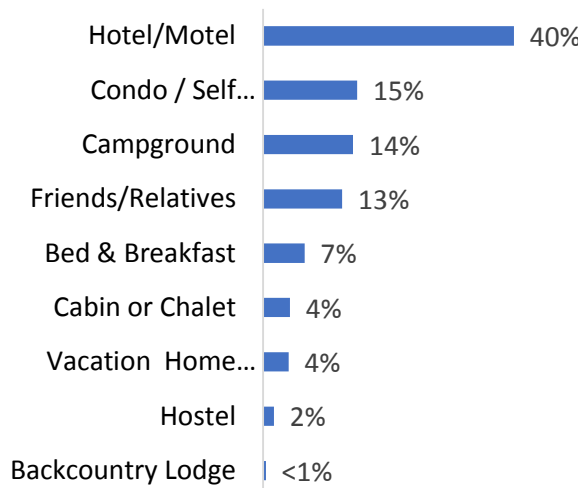
Travel Party Composition
Percentage of Visitors



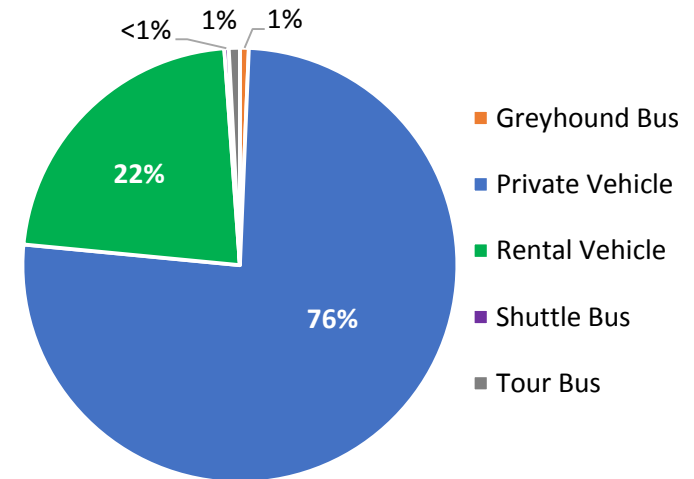
Accommodation Location
Percentage of Overnight Visitors

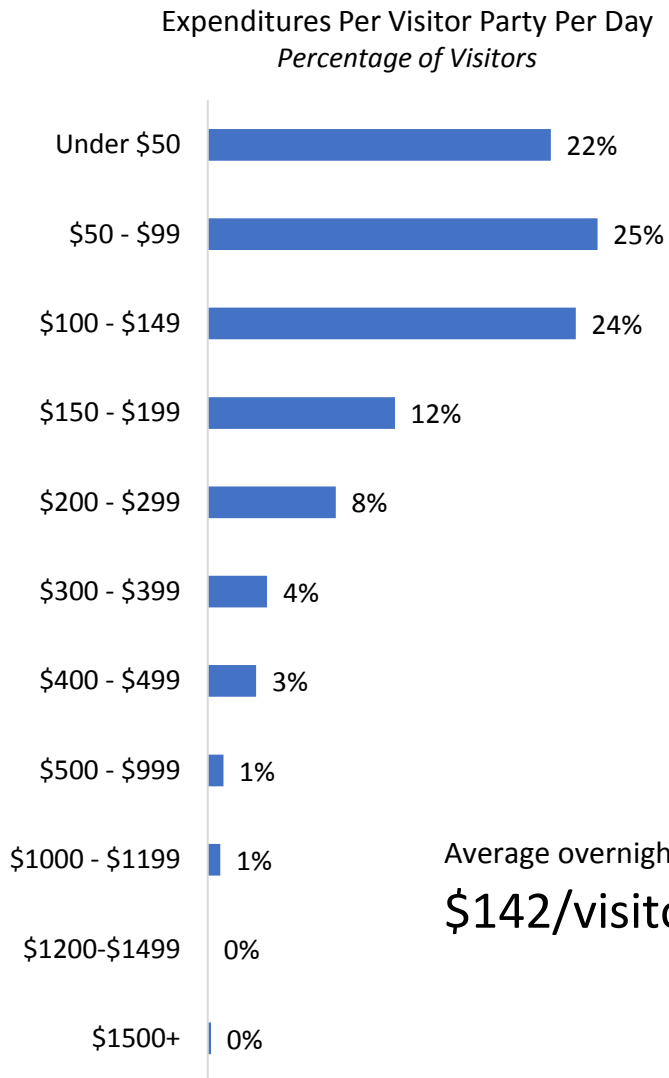


Accommodation Type
Percentage of Overnight Visitors



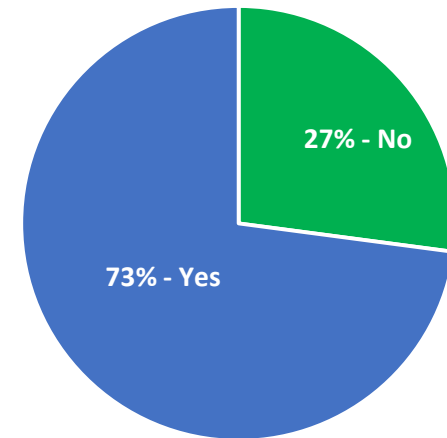
Transportation To Golden
Percentage of Visitors





Average overnight trip length¹:
\$142/visitor party/day

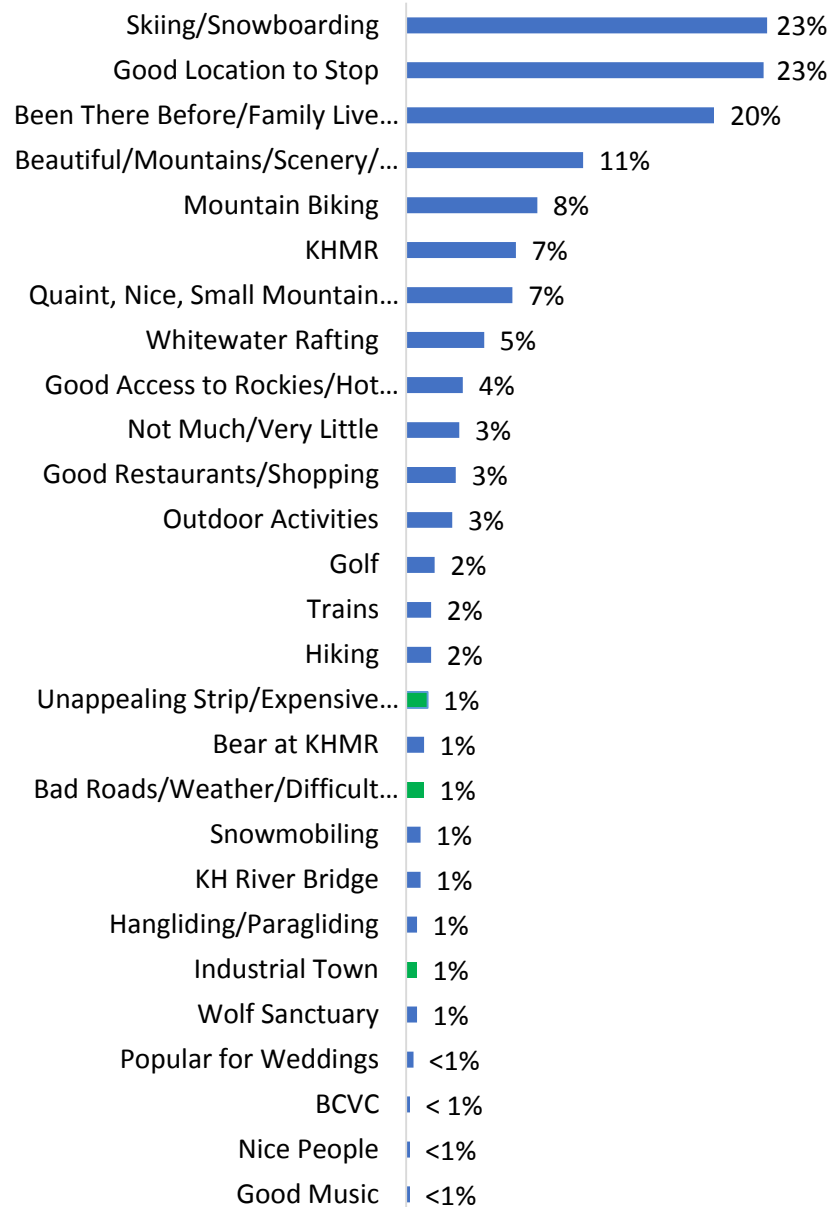
Awareness of Golden Before Visit
Percentage of Visitors



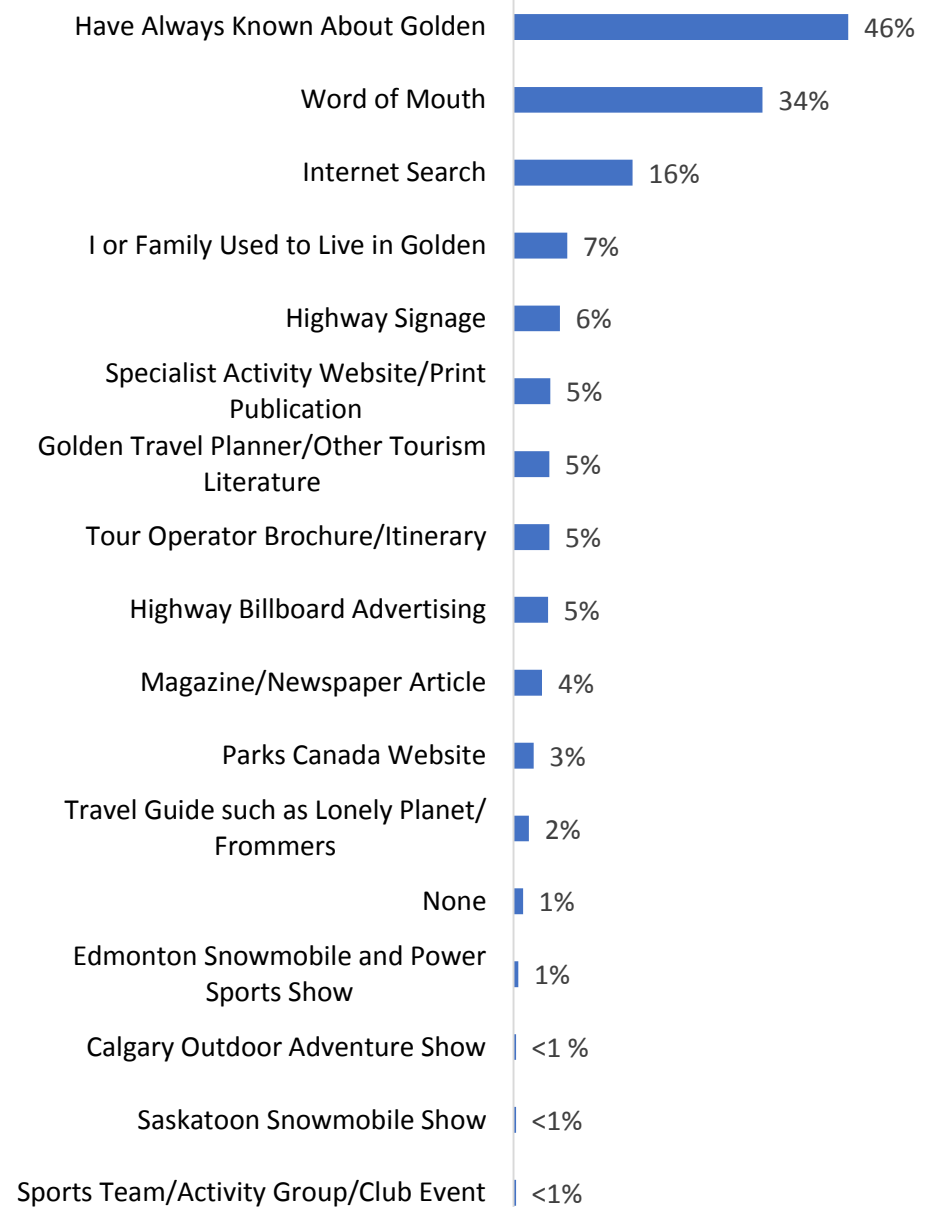
1. Use caution when interpreting average expenditures as it was calculated using the middle values of the categories recorded during the on-site interview.

3.3. Trip Planning

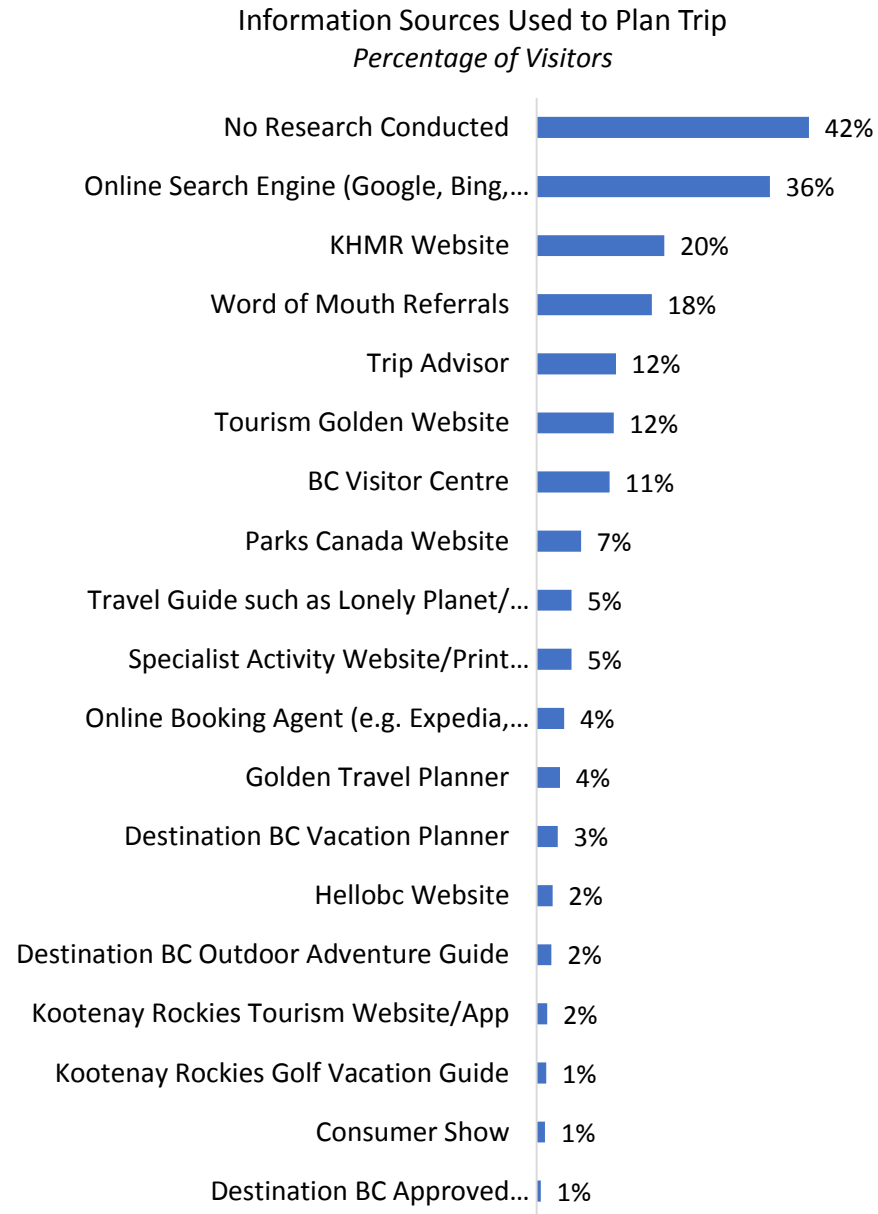
Unprompted - What Visitors Knew About Golden
Percentage of Responses



Prompted Awareness Sources
Percentage of Visitors

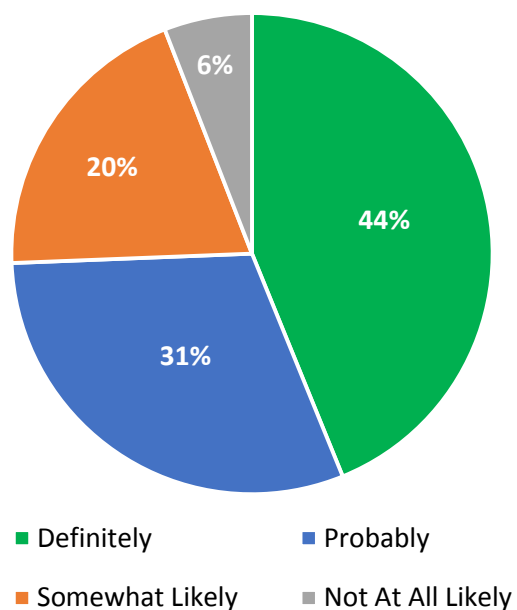


3.3.2. Research Information Sources



3.4. Evaluation of Golden Tourism Experiences

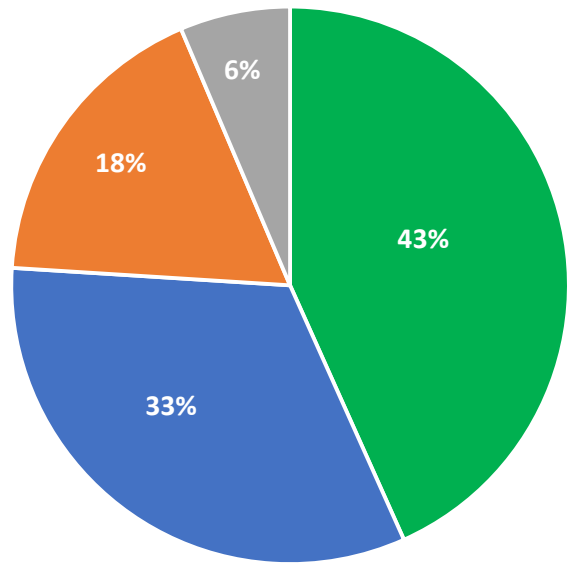
Likelihood of Visiting Golden Again
Percentage of Visitors



Likelihood Comment	Likelihood of Visiting Golden Again (n =441)			Total
	Definitely	Probably	Not Very Likely ¹	
Usual Stop On Journey	18%	18%	7%	16%
Beautiful Little Town/Scenery/Loved It	18%	14%	4%	14%
Family/Friends In The Area	18%	10%	1%	12%
Not Sure Yet/Maybe/Not Sure When	0%	7%	30%	9%
Will Come Back To Ski/Snowboard	6%	14%	3%	8%
Will Be Back Soon/Next Year/Planning A Visit	9%	9%	0%	7%
Lots Of Other Places To Visit	0%	1%	25%	6%
Would Like To Explore More Of The Area	4%	9%	4%	5%
Too Far From Home/Live Far Away	0%	0%	24%	5%
Will Come Back To Mtn. Bike	6%	2%	1%	4%
Lots To Do/Lots Of Activities	5%	5%	0%	4%
Great For Short Getaways/Live Close	3%	3%	0%	2%
Good Access Point/Location	3%	1%	0%	2%
Will Be Back To Golf	2%	2%	0%	2%
Will Come Back For Rafting	2%	1%	0%	1%
Will Come Back For Race Next Year	2%	2%	0%	1%
Work In Area So Will Be Back	2%	1%	0%	1%
Considering Changing Favourite Spot From Banff/Jasper	2%	0%	0%	1%
Will Be Back To Sled/Snowmobile	0%	1%	0%	< 1%
Suggestion For Improvement	0%	1%	0%	< 1%
Will Be Back To Hike	0%	1%	0%	< 1%

1. Includes not at all or somewhat likely.

Likelihood of Recommending Golden as a Vacation Destination - Percentage of Visitors

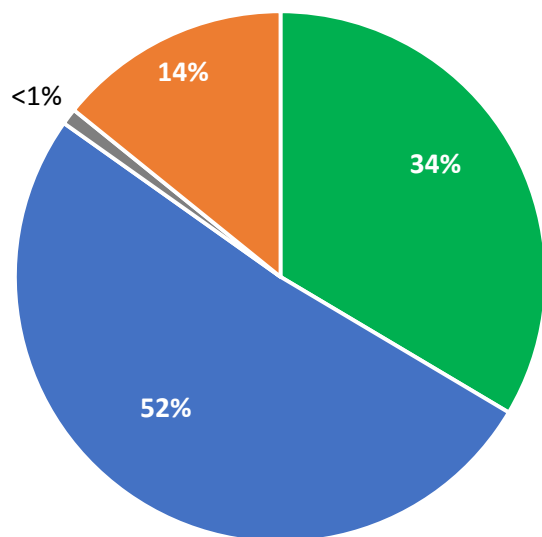


■ Definitely ■ Probably
■ Somewhat Likely ■ Not At All Likely

Recommend Comment	Likelihood of Recommending Golden (n = 383)			Total
	Definitely	Probably	Not Very Likely ¹	
Don't Know/Just Got Here/Too Soon	1%	18%	72%	26%
Location/Activities In Area	33%	20%	2%	21%
Will Recommend/Already Recommended	26%	13%	1%	16%
Scenery/Wildlife/Mountains	13%	16%	4%	11%
Outdoorsy People/Right Person	9%	16%	8%	10%
Skiing	6%	4%	2%	4%
Community Spirit/Nice Town/Friendly	6%	3%	1%	4%
Uncrowded/Less Busy/Not Touristy	3%	4%	0%	3%
Mountain Biking	4%	1%	0%	2%
KHMR	3%	1%	0%	2%
Rafting	2%	2%	0%	1%
Good Stopover	1%	2%	2%	1%
Specific Hotel/Restaurant/BCVC Recommendation	1%	3%	0%	1%
Golfing	1%	2%	0%	1%
Hiking	2%	1%	0%	1%
Good Service	1%	2%	0%	1%
Summer Music/Music	1%	1%	0%	1%
Lots Of Friends Pass Through/Hidden Gem	1%	0%	0%	1%
ATV	1%	0%	0%	< 1%
Fishing	0%	1%	0%	< 1%
Won't Recommend/Just Passing Through	0%	0%	8%	2%

1. Includes not at all or somewhat likely.

Did Golden Meet Your Expectations?
Percentage of Visitors



- Exceeded My Expectations
- Met My Expectations
- Did Not Meet My Expectations
- Not Sure Yet

Expectation Comment	Reasons for Expectations Rating (n =182) ¹			
	Exceeded	Met	Not Sure	Total
Fun/Good Visit/Nice/Like Area	18%	26%	17%	21%
Good Experience At Specific Business/BCVC	22%	22%	4%	19%
Don't Know Yet/Early/So Far So Good	7%	13%	63%	16%
Nice Town/Second Home/Hidden Gem	12%	4%	0%	8%
Friendly/Nice People	10%	6%	0%	7%
Beautiful/Scenery/Wildlife/Nature	11%	2%	0%	6%
Consistently Good/Expect Good Experience	10%	2%	0%	6%
Poor Weather	1%	11%	4%	5%
Just Passing Through	1%	9%	4%	4%
Good Variety Of Activities	4%	4%	0%	4%
Other/Unrelated	3%	4%	4%	4%
Great Mountain Biking	5%	0%	0%	3%
Good Weather	2%	0%	0%	1%
Whitewater Rafting	2%	0%	0%	1%
Not Much Going On	0%	4%	0%	1%
Good Location	0%	0%	4%	1%
Need More Signage	0%	2%	0%	1%

1. There were not enough responses from those visitors that stated their experience did not meet their expectations.

3.5. 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 differences⁵ for each market (when compared to other markets) are highlighted here. A table summarizing all data is found in Appendix A.

Visitors from Alberta were:

- Less likely to be on their first trip to Golden (30%) than visitors from BC (42%), other Canada (58%), the United States (92%) or overseas visitors (82%).
- More likely to have visited only in the summer (27%) than BC visitors (19%),
- More likely to state they stopped in Golden because it was a convenient location, (33%) compared to visitors from other Canada (20%),
- On shorter trips than all other visitors (only 30% were trips longer than a week),
- As a result of shorter trips, the average percentage of time spent in Golden (of total trip length) was 35% which was higher than other markets (29% - BC, 27% - other Canada, 23% - USA and 24% - overseas),
- Less likely to stay in the Front Country/Blaeberry Valley (18%), than visitors from other Canada (29%), the United States (38%) or overseas (31%),
- Less likely to state they stayed in a hotel/motel (43%) when compared to visitors from BC (57%). In contrast, they were more likely to stay in a hotel/motel than visitors from other Canada (27%), the United States (35%) or overseas (32%),
- More likely to be travelling in a private vehicle (100%) than those from other Canada (67%), the United States (58%) or overseas (21%),
- Less likely to go to the Kicking Horse River Bridge (27%) or the grizzly bear refuge at KHMR (26%) than overseas visitors (45%, and 40%, respectively). Although, Albertan visitors (similar to BC visitors) were more likely to participate in mountain biking than (19%) than American (5%) or overseas visitors (6%),
- Much more likely to be aware of Golden before their visit when compared to other Canadians (67%), Americans (32%) or visitors from overseas (35%). Not surprisingly, they were also more likely to state they had always known about Golden (74%), compared to other Canadians (18%), Americans (5%) or visitors from overseas (5%). Also, similar to BC visitors, visitors from Alberta were more likely to know about Golden from a word of mouth recommendation (44%) than visitors from the United States (10%) or overseas (21%),
- More likely to state they didn't do any research (50%) when compared to visitors from other Canada (28%), the United States (35%) or overseas (30%). Further, Albertan visitors were less likely to state they had a word of mouth referral (15%) or went to the BCVC (8%) than visitors from other Canada (27% and 22%, respectively), the United States, (21%, 18%, respectively) or overseas (26%, 15%, respectively),
- Most likely to state they would definitely return to Golden (62%) when compared to visitors from BC (49%), other Canadians (41%), Americans (16%) or visitors from overseas (17%), and

⁵ Key differences were identified by statistical tests or those with pragmatic differences of more than 10% difference between groups.

- More likely to reply they would definitely recommend Golden (48%) when compared to visitors from BC (38%) and the United States (32%), and overseas (37%).

BC visitors were:

- Less likely to be on their first trip to Golden (42%) than visitors from other Canada (58%), the United States (92%) or overseas visitors (82%). Although, visitors from BC were more likely to be on their first trip than visitors from Alberta (30%),
- Less likely to have visited only in the summer (19%) than Albertan visitors (27%),
- More likely to state they were in Golden because it was a convenient place to stop (39%), compared to visitors from other Canada (20%). BC visitors were also more likely to visit Golden because of a bike race (13%) than any other market origin,
- More likely to be away from home for more than a week (49%) compared to Alberta visitors (30%), but less likely to be away from home for more than a week compared to those from other Canada (83%), the United States (91%) or overseas (98%),
- Less likely to stay in the Front Country/Blaeberry Valley (7%), than visitors from Alberta (18%), other Canada (29%), the United States (38%) or overseas (31%),
- Most likely to state they stayed in a hotel/motel (57%) when compared to visitors from Alberta (43%), other Canada (27%), the United States (35%) or overseas (32%),
- More likely to be travelling in a private vehicle (95%) than those from other Canada (67%), the United States (58%) or overseas (21%),
- Spending less on average (\$115/visitor party/day) than overseas visitors (\$181/visitor party/day),
- Participating in fewer activities, on average (4.2 activities) than visitors from other Canada (5.2 activities). Most apparent was that they were less likely to go to the Kicking Horse river pedestrian bridge (32%), the Golden Art Gallery (11%) or the grizzly bear refuge at KHMR (24%) than overseas visitors (45%, 24%, 40%, respectively). Although, BC visitors were more likely to participate in mountain biking (17%) than American (5%) or overseas visitors (6%),
- Much more likely to be aware of Golden before their visit when compared to other Canadians (67%), Americans (32%) or visitors from overseas (35%). Not surprisingly, they were also more likely to state they had always known about Golden (71%), compared to other Canadians (18%), Americans (5%) or visitors from overseas (5%). Also, BC visitors were more likely to know about Golden from a word of mouth recommendation (38%) than visitors from the United States (10%) or overseas (21%),
- More likely to state they didn't do any research (52%) when compared to visitors from other Canada (28%), the United States (35%) or overseas (30%). Further, BC visitors were less likely to state they had a word of mouth referral (8%) or went to the BCVC (5%) than visitors from other Canada (27%, 22%, respectively), the United States, (21%, 18%, respectively) or overseas (26%, 15%, respectively),
- Less likely to state they would definitely return to Golden (49%) than visitors from Alberta (62%). But BC visitors were more likely to state they would definitely return to Golden than Americans (16%) or visitors from overseas (17%),
- Less likely to reply they would definitely recommend Golden (38%) than visitors from Alberta (48%) and the United States (54%), and

- Less likely to state their experience exceeded their expectation (28%) than visitors from other Canada (40%) and thus more likely to state their experience met their expectations (59%) than other Canadians (45%), Americans (48%) or visitors from overseas (49%).

Visitors from other Canada (provinces outside BC and Alberta) were:

- More likely to be on their first trip to Golden (58%) compared to visitors from BC (42%) or Alberta (30%),
- Less likely to state their primary reason for being in Golden was that it was a convenient place to stop (20%) when compared to visitors from BC (39%), Alberta (33%) or the United States (42%),
- More likely to have a primary activity of visiting friends and family (20%) when compared to visitors from Alberta (10%) or the United States (5%),
- More likely to be on trips longer than a week (83%) than visitors from BC (49%) or Alberta (30%),
- Least likely to stay in an accommodation property on highway 1 (14%), when compared to visitors from BC (34%), Alberta (31%), or the United States (31%). As a result, they were more likely to state they stayed downtown (33%) compared to visitors from Alberta (16%), the United States (14%) or overseas (23%),
- Less likely to say in a hotel/motel (27%) when compared to visitors from BC (57%) or Alberta (43%),
- More likely to use a rental vehicle (33%) than BC (3%) or Alberta (0%), but less likely than visitors from overseas (72%),
- Participating in more activities on average (5.4) than BC visitors (4.2). Canadians were more likely than all other visitors to shop for gifts (51%) or groceries (51%) or walk on the rotary trails (27%),
- More likely to be aware of Golden before their visit (67%) when compared to Americans (32%) or visitors from overseas (35%). Although, they were less aware of Golden than visitors from BC (91%) or Alberta (94%),
- Less likely to state they didn't do any research (28%) compared to visitors from BC (52%) or Alberta (50%) As such, other Canadian visitors were more likely (27%) to state they used word of mouth or online searches as an information source than BC (8%, 33%, respectively) or Albertan (15%, 33%, respectively) visitors.
- More likely to go to the BCVC than visitors from BC (5%) or Alberta (8%),
- Most likely to state they would definitely recommend Golden (54%) compared to all other visitors, and
- More likely to have their expectations exceeded (40%) than BC visitors.

Visitors from the United States were:

- The most likely of all visitors to be on their first trip to Golden (92%),
- More likely (42%) than other Canadians (20%) or overseas visitors (26%) to state their primary reason for stopping in Golden was because it was a convenient location. Were more likely (20%) than BC (6%), Alberta (8%), or overseas (10%) visitors to reply their primary reason for their trip to Golden was for relaxation.

- Less likely (18%) than visitors from BC (28%), Alberta (29%) or overseas (29%) to be travelling with children,
- On longer trips (91%) away from home for at least a week than visitors from BC (49%), Alberta (30%) or other Canadians (83%). Although, Americans were on shorter trips (42% away from home for 14+ nights), than visitors from overseas (76% away from home for 14+ nights),
- More likely to stay only for the day in Golden (31%) than visitors from overseas (21%) or other Canada (20%),
- More likely to be staying in Front Country/Blaeberry Valley (38%) than visitors from BC (7%) or Alberta (18%),
- Less likely to be in a rental vehicle (40%) than overseas visitors (70%), but more likely than visitors from BC (3%), Alberta (0%),
- Similar to BC visitors, were less likely to visit the Farmers Market (23%) than visitors from Alberta (32%), other Canada (36%) or overseas (35%),
- With overseas visitors, were more likely to hike in Glacier or Yoho National Parks (32%) than visitors from BC (8%), Alberta (6%) or other Canada (18%),
- Similar to overseas visitors, were less likely to mountain bike (5%) than visitors from BC (17%), Alberta (19%) or other Canada (16%),
- Less likely (19%) than overseas (40%) visitors to visit the Grizzly Bear Refuge at KHMR,
- More likely (68%) than visitors from BC (9%), Alberta (6%) or other Canada (33%) to be aware of Golden (before planning the trip),
- The least likely of all visitors to be aware for Golden from a word of mouth recommendation (10%),
- Less likely (35%) than visitors from BC (52%) or Alberta (50%) to state they didn't do any research while planning their trip,
- Similar to overseas visitors, were less likely (16%) to state they would definitely return to Golden compared to visitors from BC (49%), Alberta (62%) or other Canada (41%),

Visitors from overseas were:

- Less likely (82%) than Americans to be on their first trip to Golden (92%),
- More likely (29%) than Americans to be travelling with children (18%),
- On longer trips away from home (76%- 14+ nights away from home) compared to all other markets,
- More likely to stay overnight in Golden (79%) than visitors from the United States (69%),
- Less likely (23%) than BC visitors (34%) to stay near highway 1, or downtown (22% - overseas, 33% BC),
- Less likely (32%) than visitors from BC (57%) or Alberta (43%) to stay in a hotel/motel, but more likely to stay in a B&B (13%, 2% -BC, 3%- Alberta),
- The most likely (72%) of all markets to be in a rental vehicle,
- Spending more on average than other markets (\$181/party/day),
- Least likely (28%) to purchase gas (38% - BC, 40% - Alberta, 46% - other Canada, 44% - USA),
- The most likely (24%) to visit the Art Gallery of Golden (11% - BC, 15% - Alberta, 16% - other Canada, 21% - USA),
- The most likely (40%) to visit the Grizzly Bear Refuge at KHMR (24% - BC, 26% - Alberta, 29% - other Canada, 19% - USA),

- With American visitors, were more likely to hike in Glacier or Yoho National Parks (34%) than visitors from BC (8%), Alberta (6%) or other Canada (18%),
- Less likely to be aware of Golden (before planning the trip, 65% were not aware), than visitors from BC (9%), Alberta (6%) or other Canada (33%)
- Less likely (21%) than visitors from BC (38%), Alberta (44%) or other Canada (40%) to be aware of Golden from a word of mouth recommendation,
- Less likely (30%) than visitors from BC (52%) or Alberta (50%) to state they didn't do any research while planning their trip,
- Most likely (21%) to use a travel guide (e.g. Frommer's/Lonely Planet) to plan their trip compared to BC (3%), Alberta (1%), other Canada (2%), or the USA (3%), and
- With American visitors, were less likely (17%) to state they would definitely return to Golden compared to visitors from BC (49%), Alberta (62%) or other Canada (41%).

3.6. Accommodation Location Summary

Similar to the market summary, Golden visitors that stayed overnight were organized into groups based on where their accommodation was located. These four groups were: Front Country/Blaeberry Valley, downtown Golden, Highway 1 in Golden and at KHMR. Key differences⁶ for each accommodation location (when compared to other places) are highlighted below and a table summarizing all data is found in Appendix A.

Front Country/Blaeberry Valley visitors were:

- More likely to be female (59%) than visitors that stayed overnight near Highway 1,
- Younger than those staying near highway 1, as 35% of visitors were less than 34 years old compared to only 18% Highway 1 visitors,
- Less likely to be from BC (6%) compared to all other accommodation locations (>17%),
- More likely to be from the United States (16%) compared to visitors that stayed downtown Golden (6%) or at KHMR (6%),
- If from other Canada, more likely to be from Saskatchewan (39%) than all other accommodation locations (<20%). Also, Front Country visitors were less likely to be from Ontario (28%) than visitors staying near Highway 1 (44%) or at KHMR (40%),
- If from overseas, more likely to be from Europe (89%) compared to visitors that stayed overnight near Highway 1 (75%) or at KHMR (55%). If from Europe, visitors in the Front Country were more likely to be from the UK (22%), or Germany (26%) compared to those that stayed on Highway 1 (15% - UK, 15% - Germany) or at KHMR (15% - UK, 21% - Germany),
- More likely to be first time visitors to Golden (53%) compared to visitors that stayed overnight downtown Golden (43%),
- Not very likely to state their primary reason for visiting Golden was because it was a convenient location to stop (6%) compared to those that stayed near Highway 1 (53%). In contrast, they were more likely to be on family vacation (21%) than visitors that stayed near Highway 1 (9%),
- More likely to be on longer trips (more than one weeks - 66%) compared to visitors that stayed downtown Golden (55%) or at KHMR (49%),
- More likely to stay in Golden for two nights (43%) or short getaways (3-6 nights – 30%) than visitors who stayed near Highway 1 (22% - 2 nights),
- Much less likely to categorize the accommodation as a hotel/motel (0%) than other accommodation locations (there aren't any hotels/motels in the Front Country/Blaeberry Valley) Further, more likely to stay in a B&B (20%), cabin or chalet (17%), or campground (28%) than visitors that stayed at other locations,
- More likely to be travelling in a rental vehicle (40%) than visitors at other accommodation locations (< 20%),
- Spending on average, \$146/visitor party/day, which is less than visitors that stayed at KHMR (\$181/visitor party/day),
- Participating in an average of 6.4 activities, more than those that stayed near Highway 1 (3.9 activities). Front Country/Blaeberry Valley visitors were more likely to do almost all activities than Highway 1 visitors, except for eat in a local restaurant (85% - Front Country/Blaeberry Valley, 96% - Highway 1),
- Less likely to be aware of Golden (65%) than visitors that stayed downtown Golden (78%) or at KHMR (84%),

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

- Much less likely to state that they have always known about Golden (31%) than visitors that stayed at all other locations (> 41%). Also, were much more likely to state they became aware of Golden via a word of mouth recommendation (40%) than visitors that stayed near Highway 1 (23%),
- Less likely to use the Tourism Golden website (13%) than visitors that stayed downtown Golden (22%) and were less likely to use the KHMR website (18%) when compared to those that stayed at KHMR (44%). On the other hand, Front Country/Blaeberry valley visitors were more likely to visit the BCVC (17%) compared to KHMR visitors (4%),
- More likely to definitely return (48%) and recommend (57%) compared to visitors that stayed near Highway 1 (37% - return, 29% - recommend), and
- Likely to have their expectations exceeded (45%) compared to visitors that stayed near Highway 1 (28%).

Visitors that stayed overnight near Highway 1 were:

- Less likely to be female (49%) compared to Front Country/Blaeberry Valley visitors (59%),
- Older than other visitors that stayed overnight at other locations - 56% were between 35-54 years old (37% - Front Country/Blaeberry Valley, 44% - downtown Golden, 43% KHMR),
- More likely to be from BC (23%) than Front Country/Blaeberry Valley visitors (6%),
- Less likely to be from Saskatchewan (11%) compared to Front Country/Blaeberry Valley visitors (39%). On the other hand, they were more likely to be from Ontario (44%) compared to Front Country/Blaeberry Valley (28%) or downtown Golden (33%) visitors,
- More likely to be from the Asia/Pacific (25%) compared to visitors from Front Country/Blaeberry Valley (7%) or downtown Golden (11%) visitors,
- More likely to be on their first visit to Golden (60%) compared to those who stayed downtown Golden (43%) or at KHMR (50%),
- The most likely to state that Golden was a convenient place to stop (53%) compared to visitors that stayed overnight at all other locations (<11%),
- Less likely to be travelling on their own (4%) compared to visitors that stayed downtown Golden (17%),
- More likely to be on longer trips (67% - > week) compared to visitors in downtown Golden (55%) or at KHMR (49%),
- Much more likely to be staying in Golden for 1 night (66%) compared to visitors that stayed at all other locations (<24%),
- Spending a short amount of time in Golden, therefore, the average percentage of time spent in Golden (of total trip length) was 19% which was much lower than other accommodation locations (40% - Front Country/Blaeberry Valley, 42% - downtown Golden, 43% - KHMR),
- Almost all staying in a hotel/motel (98%) compared to visitors that stayed at all other locations (<29%),
- Participating in fewer activities (average = 3.9 activities) compared to visitors that stayed at all other locations (averages > 5.4 activities). Highway 1 visitors were less likely to participate in almost all activities than other locations except for eating in a local restaurant (96%, other locations < 86%),
- Less likely to be aware of Golden (66%) than visitors that stayed in downtown Golden (78%) or at KHMR (84%),

- Much more likely to state that they have always known about Golden (49%) than visitors that stayed in the Front Country/Blaeberry Valley (31%). Also, they were much less likely to state they became aware of Golden via a word of mouth recommendation (23%) than visitors that stayed at all other locations (> 37%),
- The most likely to state they didn't do any trip planning research (48%) compared to visitors that stayed overnight at all other locations (< 30%). As a result they were less likely to use almost all information sources than visitors that stayed at other locations,
- Less likely to definitely return (37%) and recommend (29%) compared to visitors that stayed at other locations (>48% definitely return, > 57% definitely recommend), and
- Less likely to have their expectations exceeded (28%) compared to visitors that stayed at all other locations (> 37%).

Visitors that stayed overnight in downtown Golden were:

- Younger than those staying near highway 1, as 32% of visitors were less than 34 years old compared to only 18% of Highway 1 visitors,
- More likely to be from BC (27%) compared to visitors that stayed at the Front Country/Blaeberry Valley (6%) or at KHMR (17%),
- Less likely to be from the United States (6%) compared to visitors that stayed in the Front Country/Blaeberry Valley (16%),
- If from other Canada, more likely to be from Saskatchewan (19%) than that stayed in the Front Country/Blaeberry Valley (39%),
- If from overseas, more likely to be from Europe (84%) compared to visitors that stayed overnight near Highway 1 (75%) or at KHMR (55%). If from Europe, visitors in downtown Golden were more likely to be from the UK (26%), or Germany (21%) compared to those that stayed near Highway 1 (15% - UK, 15% - Germany) or at KHMR (15% - UK, 21% - Germany),
- Less likely to be first time visitors to Golden (43%) compared to visitors that stayed overnight at all other locations (> 50%),
- Not very likely to state their primary reason for visiting Golden was because it was a convenient location to stop (11%) compared to those that stayed near Highway 1 (53%). In contrast, they were more likely to be visiting friends and relatives (28%) than visitors that stayed near Highway 1 (4%) or at KHMR (7%),
- Most likely to be travelling alone (17%) compared to visitors that stayed near Highway 1 (4%) or at KHMR (5%),
- Less likely to be on long trips (of more than one week - 55%) compared to visitors that stayed in the Front Country/Blaeberry Valley (66%) or near Highway 1 (67%),
- More likely to stay in Golden for two nights (33%) or short getaways (3-6 nights – 30%) than visitors who stayed near Highway 1 (80% - 2 nights, 9% - 3-6 nights),
- More likely to categorize the accommodation as a hotel/motel (29%) than other accommodations in the Front Country/Blaeberry Valley (90%). Further, more likely to stay at friends and relatives (28%) compared to visitors that stayed near Highway 1 (2%) or KHMR (2%),
- Less likely to be travelling in a rental vehicle (20%) than visitors that stayed overnight in the Front Country/Blaeberry Valley (40%),
- Spending on average, \$119/visitor party/day, which is less than visitors at all other accommodation locations. This is likely a result of the higher percentage of visitors that stayed at friends and relatives,

- Participating in an average of 6.1 activities, more than those that stayed near Highway 1 (average = 3.9 activities). Downtown Golden visitors were more likely to do almost all activities than Highway 1 visitors and were most likely to visit the Kicking Horse Pedestrian Bridge (49%) compared to visitors that stayed at KHMR (29%). On the other hand visitors that stayed downtown Golden were less likely to visit the grizzly bear refuge at KHMR (29%) than visitors that stayed at KHMR (45%),
- More likely to be aware of Golden (78%) than visitors that stayed in the Front Country/Blaeberry Valley (65%) or on Highway 1 (66%),
- Much more likely to state that they or their family used to live in Golden (19%) than visitors that stayed at all other locations (<9%),
- More likely to use the Tourism Golden website (22%) than visitors that stayed near Highway 1 (13%) and were less likely to use the KHMR website (23%) when compared to those that stayed at KHMR (44%).
- More likely to definitely return (48%) and recommend (57%) compared to visitors that stayed near Highway 1 (37% - return, 29% - recommend), and
- More likely to have their expectations exceeded (37%) compared to visitors that stayed near Highway 1 (28%).

Visitors that stayed overnight at KHMR were:

- Younger than those staying near highway 1, as 32% of visitors were less than 34 years old compared to only 18% Highway 1 visitors,
- Much more likely to be from Alberta (50%) than visitors that stayed in the Front Country/Blaeberry Valley (32%) or downtown Golden (27%). KHMR visitors were also less likely to be from BC (17%) compared to visitors that stayed at in downtown Golden (27%). On the other hand, were more likely to be from BC (17%) than visitors that stayed overnight in the Front Country/Blaeberry Valley (6%),
- Less likely to be from the United States (5%) compared to visitors that stayed in the Front Country/Blaeberry Valley (16%),
- If from other Canada, less likely to be from Saskatchewan (20%) than those that stayed in the Front Country/Blaeberry Valley (39%). In contrast, they were more likely to be from Manitoba (27%) than all other accommodation locations (<11%) and more likely to be from Ontario (40%) than those visitors that stayed in the Front Country/Blaeberry Valley (28%),
- If from overseas, less likely to be from Europe (55%) compared to visitors that stayed overnight near Highway 1 (75%) or in the Front Country/Blaeberry Valley (89%). In contrast, there was a higher proportion of visitors from other international countries (outside Europe/Asia Pacific – 25%) than other accommodation locations (<5%),
- Less likely to be first time visitors to Golden (50%) compared to visitors that stayed overnight on Highway 1 (60%),
- Not very likely to state their primary reason for visiting Golden was because it was a convenient location to stop (9%) compared to those that stayed near Highway 1 (53%). In contrast, they were more likely to be getting married or attending a wedding (24%) than visitors that stayed at all other accommodation locations (5%). KHMR visitors were less likely to be visiting friends and relatives (7%) compared to visitors that stayed in the Front Country/Blaeberry Valley (23%) or in downtown Golden (28%),
- Less likely to be travelling alone (5%) compared to visitors that stayed in downtown Golden (17%),
- Less likely to be on long trips (of more than two weeks - 49%) compared to visitors that stayed in the Front Country/Blaeberry Valley (66%) or near Highway 1 (67%),

- More likely to stay in Golden for two nights (35%) or than visitors who stayed near Highway 1 (22% - 2 nights). Visitors at KHMR were the most likely of all accommodation locations to be on short getaways (3-6 nights – 40%, other accommodation 3-6 nights - < 30%),
- The only visitors (of all accommodation locations) to stay in self-catering condos (54%),
- Less likely to be travelling in a rental vehicle (19%) than visitors that stayed overnight in the Front Country/Blaeberry Valley (40%),
- Spending on average, \$181/visitor party/day, which is more than visitors at all other accommodation locations,
- Participating in an average of 5.4 activities, more than those that stayed near Highway 1 (average = 3.9 activities) but less than visitors that stayed in in the Front Country/Blaeberry Valley (average = 6.4 activities) or downtown Golden (average = 6.1 activities). Not surprisingly, visitors at KHMR were most likely to visit the grizzly bear refuge (45%) compared with all other accommodation locations (<34%). In addition, visitors at KHMR were more likely to visit a pub or bar (47%) compared to those in the Front Country/Blaeberry Valley (32%) or on Highway 1 (21%) and hike more (53%) than visitors that stayed on Highway 1 (25%). Not surprising KHMR visitors were the least likely to visit the Kicking Horse Pedestrian Bridge (29%) compared to other accommodation locations (< 33%),
- More likely to be aware of Golden (84%) than visitors that stayed in the Front Country/Blaeberry Valley (65%) or near Highway 1 (66%),
- More likely to be aware of Golden because of word of mouth recommendation (44%) than visitors that stayed near Highway 1 (23%),
- Much less likely to respond that they didn't do any trip planning research (28%) compared to visitors that stayed near Highway 1 (48%). KHMR visitors were more likely to use the KHMR website (44%) than visitors that stayed at all other accommodation locations (<23%). On the other hand KHMR visitors were less likely to visit the BCVC (4%) than visitors at that stayed in the Front Country/Blaeberry Valley (17%) or in downtown Golden (12%),
- More likely to definitely return (49%) and recommend (60%) compared to visitors that stayed near Highway 1 (37% - return, 29% - recommend), and
- More likely to have their expectations exceeded (42%) compared to visitors that stayed near Highway 1 (28%).

3.7. Annual Summary

Golden visitor surveys were also conducted in 2013 and 2014. Although conducted in different time periods⁷, they allow for rough comparisons to 2015 results. Please note, only shifts of more than 10% between years are highlighted here. Characteristics that were similar are not included in these highlights.

In 2015:

- Visitors were less likely to be from Alberta (38%) when compared to 2014 (45%) or 2013 (53%),
- Other Canadians were less likely to be from Ontario (36%), than 2014 (45%) or 2013 (51%),
- Visitors were more likely to be on their first trip to Golden (52%) than in 2013 (37%),
- Visitors were less likely to have visited in both winter and summer (24%) than 2013 (38%),
- Visitors were more likely to be travelling with children (27%) than 2013 (14%),
- Visitors were less likely to be travelling with their spouse/partner (40%) than 2013 (52%),
- Visitors were more likely to be on trips of more than 2 weeks (30%) than 2014 (17%) or 2013 (20%),
- A smaller percentage of visitors bought gas (38%) compared to 2014 (51%),
- A larger percentage of visitors hiked around Golden/KHMR (35%) than 2013 (14%),
- A smaller percentage of visitors walked/cycled on the Rotary Trails (12%) than 2014 (23%),
- A larger percentage of visitors went to the Grizzly Bear Refuge at KHMR (28%) compared to 2014 (18%) or 2013 (9%),
- A smaller percentage visitors went to a pub/bar (29%) compared to 2014 (39%) or 2013 (40%),
- A smaller percentage of visitors indicated they were aware of Golden before their trip (73%) than 2013 (86%),
- Visitors were more likely to indicate they have always known about Golden (46%) compared to 2013 (29%),
- A larger percentage of visitors indicated they were aware of Golden from word of mouth recommendations (34%) compared to 2014 (23%) or 2013 (23%),
- A larger percentage of visitors indicated they didn't do any research to plan their trip (42%) than in 2014 (24%),
- A larger percentage of visitors indicated they had word of mouth information sources (18%) than in 2013 (4%),
- Visitors were more likely to respond that they used the KHMR website (20%) than in 2013 (6%),
- A larger percentage of visitors went to the BCVC (11%) than in 2013 (<1%), and
- Visitors were less likely to respond they would definitely recommend Golden (43%) than 2014 (54%) or 2013 (58%).

⁷ The 2014 visitor survey was conducted between March and September while 2013 visitor survey was conducted between August and September.

4. KEY INSIGHTS

Short-haul, rubber-tire visitors (from BC and Alberta) equal 58% of the summer visitors to Golden and confirms the main markets identified in the Golden's 2014-15 marketing plan. More specifically, Golden's top geographic markets in the summer of 2015 were:

- Alberta (38%),
- BC (20%),
- United States (10%) – California (1%), Texas (1%) and Washington (< 1%),
- Ontario (5%),
- Saskatchewan (4%),
- United Kingdom (4%), and
- Germany (3%).

Golden's current brand position – the Authentic Outdoor Explorer, is also supported by this research, including these findings:

1. The top primary reasons for visiting Golden were:
 - a. On-route to another destination (31%),
 - b. Friends and family related travel (25%),
 - c. Outdoor recreation activities (16%),
 - d. Sightseeing/general relaxation (11%), and
 - e. Getting married/attending a wedding (8%).
2. Open-ended responses for awareness and experience evaluation resulted in definite themes about visitor perceptions of Golden. They include:
 - a. Golden is often a traditional stop on a longer journey,
 - b. KHMR is a key feature that attracts visitors to Golden,
 - c. Golden is a scenic, un-spoiled, small mountain town with friendly people and vibrant community spirit,
 - d. Golden is a great location to access outdoor activities in the surrounding land,
 - e. Key outdoor activities are skiing/snowboarding, mountain biking, hiking, river rafting and golf.
3. Visitors were asked what they knew about Golden, and almost half of unprompted⁸ responses were related to outdoor recreation activities (e.g. skiing/snowboarding, mountain biking, hiking etc.). This demonstrates the top of mind awareness about Golden is about outdoor activities. Fewer (23%) of visitors stated it was a good place to stop. Only a few visitors mentioned they thought of Golden as an industrial town (1%) or the 'trains' (2%).

⁸ Meaning no list was presented.

Of those that visited to participate in outdoor recreation activities (16% overall), almost half mountain biked (42%) while another 17% participated in a mountain bike race.⁹ Thus, the majority (59%) of outdoor recreation visitors were in to mountain bike. Also, mountain biking seems to be gaining importance to Golden visitors (7% primary reason in 2015, 6% in 2014 and 4% in 2013 - although not significant increases). This is particularly true for visitors from BC and Alberta (Golden's top geographic markets).

A total of 76% of visitors stayed overnight in Golden and 24% were day visitors. Most overnight visitors stayed one or two nights (64%), while 27% stayed between 3 and 6 nights and 8% stayed longer than a week. This resulted in an average length of stay of 2.4 nights. There are continued opportunities to attract visitors to stay longer in Golden, which is supported by:

- A large number of visitors mentioned they have a tradition of stopping in Golden on their journey to somewhere else,
- The perception of Golden as a great stop-over location, and
- A third of visitors stay near Highway 1 for one night. Further, among visitors that stayed near Highway 1, the average percentage of time spent in Golden (of total trip length) was 19% which was much lower than other accommodation locations (40% - Front Country/Blaeberry Valley, 42% - downtown Golden, 43% - KHMR).

On average, visitors spent \$142/visitor party/day. Most (71%) spent under \$150/visitor party/day while 29% spent more than \$150/visitors party/day. Overseas visitors spent the most (\$181/visitor party/day).

Analysis by key market and accommodation location revealed these key insights:

- As expected, when compared to visitors from BC and Alberta, American and overseas visitors were:
 - On longer trips,
 - More likely to be on their first trip to Golden,
 - More likely to stay overnight somewhere other than near Highway 1, and
 - Less likely to definitely return to Golden,
- Interestingly, American visitors (18%) were less likely to be travelling with children than overseas visitors (29%),
- On average, overseas visitors spent the most (\$181/visitor party/day, average - \$142/visitor party/day)
- Visitors from BC and Alberta were similar except that:
 - BC visitors were on longer trips away from home,
 - BC visitors were less likely to stay at KHMR but more likely to stay in downtown Golden,
 - BC visitors were less likely to visit the Farmers Market than visitors from Alberta,
 - BC visitors were more likely to state they knew about Golden because they had been there before (23% - BC, 14% Alberta), or that it was a good location to stop (31% - BC, 23% Alberta),

⁹ If calculated as a percentage of all visitors (and not just the percentage of those there for outdoor recreation) this equals 9%.

- BC visitors were less likely to state they were aware of Golden from an Internet search (14% - BC, 21% Alberta), and
- BC visitors were much less likely to definitely return to Golden (49% - BC, 62% Alberta) or definitely recommend Golden (49% - BC, 62% - Alberta).
- Visitors that stay in Golden near Highway 1 only stay for one night and participate in few activities. Visitors that stay overnight in other locations stay longer and participate in more activities.
- Visitors that stay at KHMR spend (\$181/visitor party/day) more than those that stayed at other locations (overall average is \$142/visitor party/day),
- Visitors that stay at KHMR are more likely to be in or attending a wedding, which is particularly true for visitors from Alberta and BC,
- Visitors that stay longer and participate in more activities (at locations other than Highway 1) are more likely to return to Golden, recommend Golden and have their expectations exceeded.

Word-of-mouth is gaining importance as both an awareness source and as a source of trip planning information when compared among years. This reflects results of other visitor services research that finds that word of mouth recommendations (in person or online) are gaining in importance. This is most likely because visitors place more importance on personal connections due to the great variety and abundance of trip planning information sources available to travellers.

A third (34%) of visitors responded that their visit to Golden exceeded their expectations. When asked why they gave that rating, the most popular response (22%) was that they had a good experience at an individual business (e.g. a hotel, restaurant or the BCVC). This supports the importance of great customer service/visitor servicing has on the overall experience in Golden. This is particularly important as word of mouth as both an awareness and information source gains importance in trip planning activities.

Align Consulting was asked to review the research methodology used to prepare past visitor survey reports. The main recommendations include:

- Improve response rates to the follow-up survey by:
 - Offering an incentive,
 - Shorten the on-site questionnaire and move more detailed trip planning questions to the follow-up questionnaire,
 - Change some of the experience evaluation questions and move to the follow-up questionnaire.
 - Enhance researcher training and coaching,
 - Send the online follow-up questionnaire as soon as possible after on-site data collection, and
 - Send multiple reminders to follow-up survey participants.
- Link the on-site and follow-up questionnaire for analysis by market of follow-up questionnaire data,
- Investigate weighting (or balancing) of responses in relation to accommodation capacity by location, and
- Make revisions to the questionnaire, including the addition of a question about key competitors and social media use.

Appendices

Appendix A. Origin, Accommodation and Annual Summary

Appendix B. Questionnaire

Appendix C. Alberta Origin Communities

Appendix A. Origin, Accommodation and Yearly Summary

		Origin					Accommodation				Annual		
		BC (n=120)	AB (n=234)	Other Canada (n=83)	USA (n=62)	OVS (n=110)	Front Country (n=99)	Highway 1 (n=126)	DWTN (n=102)	KHMR (n=129)	2015 (n=609)	2014 (n=1,806)	2013 (n=433)
Gender	Female	46%	48%	60%	53%	54%	59%	49%	55%	50%	51%	49%	48%
	Male	54%	52%	40%	47%	46%	41%	51%	45%	50%	49%	51%	52%
Age	19 -25	6%	7%	7%	3%	8%	5%	8%	13%	3%	6%	9%	9%
	26-34	18%	24%	22%	10%	22%	30%	10%	19%	29%	20%	20%	23%
	35 - 44	20%	23%	18%	15%	16%	11%	23%	20%	27%	20%	22%	18%
	45 - 54	23%	24%	34%	23%	27%	26%	33%	24%	16%	26%	21%	17%
	55 - 64	24%	15%	12%	32%	17%	15%	17%	19%	19%	19%	18%	18%
	65 +	8%	7%	7%	18%	9%	12%	10%	7%	6%	9%	10%	14%
Origin	BC	100%	0%	0%	0%	0%	6%	23%	27%	17%	20%	16%	17%
	AB	0%	100%	0%	0%	0%	32%	44%	27%	50%	38%	45%	53%
	Other Canada	0%	0%	100%	0%	0%	18%	7%	21%	12%	14%	13%	12%
	USA	0%	0%	0%	100%	0%	16%	10%	6%	5%	10%	9%	8%
	OVS	0%	0%	0%	0%	100%	27%	16%	19%	16%	18%	17%	10%
Other Canada	Saskatchewan	0%	0%	25%	0%	0%	39%	11%	19%	20%	25%	27%	23%
	Manitoba	0%	0%	10%	0%	0%	6%	11%	0%	27%	10%	9%	5%
	Ontario	0%	0%	36%	0%	0%	28%	44%	33%	40%	36%	45%	51%
	Quebec	0%	0%	16%	0%	0%	22%	22%	24%	0%	16%	14%	2%
	Nova Scotia	0%	0%	4%	0%	0%	0%	11%	5%	7%	4%	0%	5%
	New Brunswick	0%	0%	5%	0%	0%	0%	0%	10%	0%	5%	0%	5%
	Newfoundland	0%	0%	2%	0%	0%	0%	0%	5%	7%	2%	3%	2%
	Yukon	0%	0%	1%	0%	0%	0%	0%	5%	0%	1%	2%	0%
PEI	0%	0%	1%	0%	0%	6%	0%	0%	0%	1%	0%	0%	
US State	Washington	0%	0%	0%	8%	0%	19%	0%	0%	14%	8%	15%	8%
	California	0%	0%	0%	13%	0%	6%	8%	0%	0%	13%	17%	8%
	Oregon	0%	0%	0%	5%	0%	0%	8%	0%	0%	5%	1%	8%

		Origin					Accommodation				Annual		
		BC (n=120)	AB (n=234)	Other Canada (n=83)	USA (n=62)	OVS (n=110)	Front Country (n=99)	Highway 1 (n=126)	DWTN (n=102)	KHMR (n=129)	2015 (n=609)	2014 (n=1,806)	2013 (n=433)
	Arizona	0%	0%	0%	6%	0%	6%	0%	33%	0%	6%	0%	0%
	Colorado	0%	0%	0%	6%	0%	0%	15%	0%	0%	6%	5%	8%
	Montana	0%	0%	0%	6%	0%	0%	8%	17%	0%	6%	~2%	0%
	Texas	0%	0%	0%	10%	0%	6%	15%	17%	29%	10%	9%	13%
	Utah	0%	0%	0%	6%	0%	6%	8%	17%	0%	6%	0%	0%
	Florida	0%	0%	0%	5%	0%	13%	0%	0%	14%	5%	~2%	8%
	New York	0%	0%	0%	5%	0%	6%	0%	0%	29%	5%	5%	0%
	Other	0%	0%	0%	29%	0%	38%	38%	17%	14%	29%	44%	47%
Cont.	Europe	0%	0%	0%	0%	74%	89%	75%	84%	55%	74%		
	Asia/Pacific	0%	0%	0%	0%	19%	7%	25%	11%	20%	19%	NA	NA
	Other Int.	0%	0%	0%	0%	7%	4%	0%	5%	25%	7%		
Int. Country	UK	0%	0%	0%	0%	20%	22%	15%	26%	15%	20%	24%	7%
	Switzerland	0%	0%	0%	0%	7%	4%	10%	0%	10%	7%	NA	NA
	Netherlands	0%	0%	0%	0%	13%	19%	20%	21%	5%	13%	NA	NA
	Germany	0%	0%	0%	0%	18%	26%	15%	21%	15%	18%	21%	7%
	Europe Other	0%	0%	0%	0%	15%	19%	15%	16%	10%	15%	NA	NA
	Australia/New Zealand	0%	0%	0%	0%	13%	7%	10%	5%	15%	13%	10%	6%
	Middle East	0%	0%	0%	0%	5%	0%	0%	5%	20%	5%	NA	NA
	Asia/Pacific	0%	0%	0%	0%	6%	0%	15%	5%	5%	6%	NA	NA
Other Int.	0%	0%	0%	0%	2%	4%	0%	0%	5%	2%	~44%	~40%	

Notes: 2014 and 2013 did not include percentages for Switzerland, Netherlands, Europe – Other, Middle East or the Asia Pacific. Therefore, the percentage of other international is larger than for 2015.

2015 Golden Summer Visitor Survey

				Origin			Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Visited Golden Before	No	42%	30%	58%	92%	82%	53%	60%	43%	50%	52%	46%	37%
	Yes Both	34%	35%	11%	2%	11%	29%	19%	28%	19%	24%	28%	38%
	Yes In The Summer	19%	27%	20%	3%	5%	11%	15%	25%	21%	18%	19%	19%
	Yes In The Winter	5%	8%	11%	3%	2%	7%	6%	4%	10%	6%	7%	6%
Primary Reason	Convenient Place To Stop/On-Route	39%	33%	20%	42%	26%	6%	53%	11%	9%	32%	26%	23%
	Family Vacation	7%	15%	17%	16%	18%	21%	9%	18%	18%	15%	9%	9%
	Visiting Friends Or Family	11%	10%	20%	5%	14%	23%	4%	28%	7%	12%	12%	10%
	Relaxation	6%	8%	13%	20%	10%	16%	7%	8%	13%	10%	9%	2%
	Getting Married Or Attending A Wedding	8%	12%	8%	0%	5%	5%	5%	5%	24%	8%	5%	13%
	Mountain Biking	6%	11%	7%	2%	2%	9%	3%	11%	8%	7%	6%	4%
	Visiting National Parks	4%	1%	3%	5%	9%	7%	3%	6%	2%	4%	3%	NA
	Bike Race	13%	1%	0%	0%	0%	0%	1%	5%	8%	3%	NA	NA
	Hiking	1%	1%	1%	5%	6%	4%	4%	0%	2%	2%	2%	3%
	Whitewater Rafting	1%	2%	5%	2%	3%	1%	3%	4%	2%	2%	1%	<1%
	Sightseeing/ Nature/Wildlife	1%	1%	0%	2%	3%	1%	3%	1%	1%	1%	3%	7%
	Golf	0%	2%	0%	0%	2%	0%	2%	0%	2%	1%	1%	1%
	Business/Corporate Meeting Or Event	1%	0%	3%	0%	0%	2%	1%	0%	0%	1%	3%	2%
	Touring Itinerary	0%	0%	1%	0%	2%	0%	1%	0%	0%	1%	<1%	NA
	Other	0%	1%	0%	0%	0%	0%	2%	0%	1%	1%	1%	2%
	Other Festival/Concert	0%	1%	0%	0%	0%	1%	0%	1%	1%	1%	1%	<1%
	Reunion	1%	0%	1%	0%	1%	0%	0%	1%	2%	1%	NA	NA
Via Ferratta	0%	1%	0%	0%	0%	1%	0%	1%	1%	1%	NA	NA	
Camping	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%	NA	NA	

Note(s): Visited Golden percentages (for all 2015) do not match exactly to report text because in the report text percentages are of repeat visitors and not of all visitors. Primary reason report text does not match exactly because some categories that are presented here are grouped together in the body of the report.

		Origin					Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Travel Party	Business Associates	2%	0%	1%	0%	1%	1%	2%	0%	1%	1%	<1%	< 1%
	On My Own	13%	6%	14%	6%	6%	10%	4%	17%	5%	9%	8%	10%
	With An Organised Leisure Tour Group	0%	0%	0%	3%	4%	1%	2%	0%	0%	1%	2%	2%
	With Family Members INCLUDING Children	28%	29%	24%	18%	29%	26%	25%	27%	33%	27%	27%	14%
	With Family Members NOT Including Children	8%	8%	7%	11%	10%	6%	11%	8%	9%	9%	9%	6%
	With Friends	13%	17%	12%	11%	13%	16%	14%	13%	15%	14%	16%	17%
	With Spouse Or Partner	36%	41%	41%	50%	37%	39%	43%	36%	37%	40%	37%	52%
Total Trip Length	1 Night	2%	5%	2%	2%	0%	2%	2%	4%	4%	3%	4%	5%
	2 Nights	13%	27%	0%	2%	1%	14%	7%	13%	19%	13%	11%	20%
	3 Nights	13%	16%	0%	0%	1%	2%	5%	9%	18%	9%	10%	35%
	4 Nights	5%	9%	6%	0%	0%	3%	7%	5%	6%	5%	6%	
	5 Nights	9%	7%	5%	2%	0%	8%	6%	5%	3%	5%	4%	
	6 Nights	9%	6%	5%	2%	0%	4%	6%	10%	1%	5%	4%	20%
	7 - 13 Nights	34%	23%	38%	49%	22%	34%	44%	16%	23%	29%	21%	
	14 Or More Nights	15%	7%	45%	42%	76%	32%	23%	39%	26%	30%	17%	
Average trip length	7.4	5.4	10.9	11.1	12.9	9.1	8.9	8.6	7.3	8.5			
Stay in Golden	Day	28%	23%	20%	31%	21%	0%	0%	0%	0%	24%	22%	19%
	Overnight	72%	77%	80%	69%	79%	100%	100%	100%	100%	76%	78%	81%
	Average stay in Golden	2.1	1.9	3.0	2.6	3.1	3.6	1.7	3.6	3.1	2.4	NA	NA
	Average stay in Golden/Average trip length	29%	35%	27%	23%	24%	40%	19%	42%	43%	28%	NA	NA
Nights In Golden	1 Night	33%	33%	27%	28%	31%	13%	66%	24%	18%	31%	28%	29%
	2 Nights	36%	35%	27%	28%	32%	43%	22%	33%	35%	33%	28%	34%
	3 Nights	13%	20%	14%	14%	10%	12%	6%	16%	26%	15%	20%	18%
	4 Nights	3%	7%	5%	7%	8%	10%	2%	7%	6%	6%	8%	6%

		Origin					Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
	5 Nights	5%	2%	9%	9%	1%	8%	1%	3%	5%	4%	5%	5%
	6 Nights	2%	2%	3%	2%	0%	0%	0%	4%	3%	2%	3%	<1%
	7 - 13 Nights	8%	2%	14%	7%	8%	10%	3%	9%	5%	6%	6%	2%
	14 Nights Or More	0%	0%	2%	5%	9%	3%	0%	5%	2%	2%	2%	5%
Accommodation Location	Front Country	7%	18%	29%	38%	31%	100%	0%	0%	0%	22%	18%	11%
	Highway 1	34%	31%	14%	31%	23%	0%	100%	0%	0%	28%	27%	37%
	Downtown	33%	16%	33%	14%	22%	0%	0%	100%	0%	22%	28%	22%
	KHMR	26%	36%	24%	17%	23%	0%	0%	0%	100%	28%	28%	30%
Accommodation Type	Backcountry Lodge	0%	1%	0%	2%	0%	2%	0%	0%	0%	<1%	<1%	0%
	Bed & Breakfast	2%	3%	9%	14%	13%	20%	0%	6%	3%	7%	4%	7%
	Cabin Or Chalet	0%	4%	9%	7%	3%	17%	0%	1%	2%	4%	6%	2%
	Campground	12%	15%	15%	12%	17%	28%	0%	28%	5%	14%	13%	9%
	Condo/Self Catering Hotel	13%	19%	17%	12%	9%	0%	0%	0%	54%	15%	11%	5%
	Friends/Relatives	12%	11%	18%	7%	16%	25%	2%	28%	2%	13%	16%	17%
	Hostel	2%	1%	2%	2%	3%	1%	0%	6%	0%	2%	3%	0%
	Hotel/Motel	57%	43%	27%	35%	32%	0%	98%	29%	24%	40%	44%	55%
Vacation Home Rental	2%	3%	3%	9%	6%	6%	0%	1%	9%	4%	2%	3%	
Transportation	Greyhound Bus	1%	0%	0%	0%	3%	0%	0%	3%	1%	1%	1%	<1
	Private Vehicle	95%	100%	67%	58%	21%	60%	79%	76%	80%	76%	75%	81
	Rental Vehicle	3%	0%	33%	40%	72%	40%	18%	20%	19%	22%	22%	14
	Shuttle Bus	1%	0%	0%	0%	1%	0%	1%	0%	0%	<1%	<1%	NA
	Tour Bus	0%	0%	0%	2%	4%	0%	2%	1%	0%	1%	2%	1
Daily Spend	Under \$50	28%	22%	18%	26%	17%	18%	11%	24%	9%	22%	16%	25%
	\$50 - \$99	27%	27%	25%	21%	20%	26%	28%	28%	18%	25%	22%	29%
	\$100 - \$149	23%	22%	23%	27%	25%	20%	33%	25%	28%	24%	20%	14%
	\$150 - \$199	9%	11%	12%	11%	18%	18%	10%	10%	19%	12%	17%	10%
	\$200 - \$299	8%	10%	6%	8%	6%	6%	11%	8%	12%	8%	14%	7%
	\$300 - \$399	3%	4%	4%	5%	5%	4%	3%	3%	7%	4%	4%	4%

2015 Golden Summer Visitor Survey

	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
\$400 - \$499	2%	2%	10%	0%	5%	6%	1%	3%	5%	3%	3%	3%
\$500 - \$999	1%	1%	0%	2%	2%	1%	1%	0%	3%	1%	2%	6%
\$1000 - \$1199	0%	0%	2%	0%	2%	0%	2%	0%	0%	1%	<1%	<1%
\$1200 - \$1499	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	<1%	<1%
\$1500 +	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	<1%	<1%
Average (\$ CDN)	\$115	\$131	\$171	\$125	\$181	\$146	\$167	\$119	\$181	\$142	NA	NA

2015 Golden Summer Visitor Survey

Activities	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Ate In A Local Restaurant	84%	80%	78%	77%	77%	85%	96%	76%	82%	80%	85%	83%
Shopped Locally For Gifts Or Clothing	38%	37%	51%	34%	40%	54%	30%	47%	42%	39%	38%	37%
Shopped For Groceries	29%	33%	51%	34%	43%	65%	17%	59%	47%	36%	37%	36%
Visited Farmers Market	23%	32%	36%	23%	35%	49%	19%	42%	22%	30%	24%	22%
Bought Gas	38%	40%	46%	44%	28%	52%	37%	48%	40%	38%	51%	37%
Attended A Festival Or Concert	5%	5%	12%	5%	5%	10%	2%	17%	5%	6%	6%	12%
Attended A Summer Kicks Event	3%	3%	6%	3%	5%	3%	3%	10%	5%	4%	5%	
Visited Kicking Horse Pedestrian Timber Frame Bridge	32%	27%	46%	31%	45%	45%	33%	49%	29%	34%	39%	31%
Visited The Art Gallery Of Golden	11%	15%	16%	21%	24%	25%	15%	22%	13%	16%	18%	22%
Visited The Golden Museum	5%	4%	2%	0%	6%	6%	5%	8%	1%	4%	3%	2%
Hiking Around Golden / KHMR	36%	33%	37%	31%	41%	51%	25%	46%	53%	35%	29%	14%
Hiking At Glacier Or Yoho National Parks	8%	6%	18%	32%	34%	32%	11%	23%	17%	16%	15%	10%
Walked Or Cycled The Rotary Trails	10%	13%	27%	3%	8%	18%	13%	18%	9%	12%	23%	9%
Visited Northern Lights Wolf Centre	4%	6%	2%	6%	12%	14%	6%	6%	4%	6%	6%	3%
Mountain Biking	17%	19%	16%	5%	6%	18%	6%	23%	22%	14%	11%	8%
Golf	7%	8%	5%	2%	5%	5%	7%	7%	10%	6%	5%	7%
Whitewater Rafting	7%	9%	13%	11%	14%	13%	10%	15%	16%	10%	6%	3%
Canoeing Or Kayaking	0%	1%	7%	3%	2%	3%	2%	4%	3%	2%	3%	2%
Visited Columbia Wetlands	5%	4%	1%	3%	8%	9%	4%	3%	7%	4%	4%	1%
Paragliding	1%	1%	6%	0%	1%	1%	1%	3%	3%	1%	1%	0%
Sky Diving	0%	0%	2%	0%	1%	1%	0%	1%	2%	1%	1%	0%

Activities	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Horse Riding	0%	2%	2%	5%	6%	6%	0%	2%	6%	3%	1%	1%
ATV Tour	0%	1%	1%	2%	1%	2%	2%	1%	0%	1%	1%	1%
Fishing	1%	2%	0%	2%	3%	5%	0%	1%	2%	1%	1%	1%
Cross Country Ski	1%	1%	0%	0%	0%	1%	0%	1%	1%	0%	2%	1%
Snowmobiling	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	1%	1%
Ski/Snowboard At KHMR	2%	3%	0%	0%	0%	1%	1%	3%	3%	1%	18%	10%
Ski/Snowboard - Other Resorts	1%	1%	0%	0%	0%	0%	0%	1%	2%	0%	3%	1%
Ski Touring/Back Country	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	2%	1%
Snowshoe	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	1%	1%
Did Not/Will Not Do Any Of The Listed Activities	2%	2%	2%	5%	3%	0%	0%	1%	0%	2%	0%	2%
Ice-Skating	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%
Via Ferrata at KHMR	0%	3%	2%	0%	2%	2%	1%	3%	4%	2%	NA	NA
Visited Grizzly Bear Refuge/ KHMR	24%	26%	29%	19%	40%	34%	20%	29%	45%	28%	18%	9%
Visited A Pub Or Bar	26%	30%	30%	32%	27%	32%	21%	42%	47%	29%	39%	40%
Heli Or Cat Ski	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Attended Hockey Game	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Average Number Participated	4.2	4.5	5.4	4.3	5.2	6.4	3.9	3.1	5.4	4.7	NA	NA

2015 Golden Summer Visitor Survey

		Origin					Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Aware of Golden?	No	9%	6%	33%	68%	65%	35%	34%	22%	16%	27%	20%	14%
	Yes	91%	94%	67%	32%	35%	65%	66%	78%	84%	73%	80%	86%
Unprompted Awareness	Previous Experience/Family	23%	14%	20%	22%	44%	24%	17%	31%	13%	20%	NA	NA
	Trains	2%	1%	4%	0%	0%	0%	1%	3%	2%	2%		
	Skiing/Snowboarding	22%	26%	25%	17%	10%	22%	19%	24%	33%	23%		
	Whitewater Rafting	3%	6%	7%	0%	3%	5%	4%	3%	5%	5%		
	Good Location To Stop/On Route/Location	31%	23%	13%	22%	18%	14%	42%	12%	12%	23%		
	Not Much/Just That It Was Here/Very Little	4%	3%	5%	6%	3%	2%	1%	3%	5%	3%		
	Good Access To Rockies/Good Access To Hot Springs	3%	2%	7%	11%	8%	2%	2%	8%	4%	4%		
	Quaint, Nice, Small Mountain Town	7%	6%	5%	11%	10%	10%	5%	6%	7%	7%		
	Unappealing Strip/Expensive Gas	2%	1%	2%	0%	0%	0%	1%	3%	0%	1%		
	Wolf Sanctuary	0%	1%	0%	0%	0%	2%	0%	0%	0%	<1%		
	Snowmobiling	0%	2%	0%	0%	0%	2%	2%	0%	1%	1%		
	Hangliding/Paragliding	2%	0%	0%	6%	0%	0%	1%	0%	0%	1%		
	KH River Bridge	2%	1%	0%	0%	0%	2%	0%	0%	0%	1%		
	Popular For Weddings	0%	0%	2%	0%	0%	0%	0%	0%	2%	<1%		
	Good Restaurants/Shopping/Amenities	3%	4%	2%	6%	3%	3%	6%	3%	1%	3%		
BCVC	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			

2015 Golden Summer Visitor Survey

	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Hiking	2%	1%	2%	6%	3%	5%	0%	1%	2%	2%		
Beautiful/Mountains /Scenery/Nature	12%	8%	20%	6%	18%	14%	11%	14%	9%	11%		
Mountain Biking	11%	9%	9%	0%	3%	13%	4%	15%	9%	8%		
Bear At KHMR	2%	0%	0%	6%	3%	2%	1%	0%	2%	1%		
Industrial Town	0%	0%	4%	0%	0%	0%	1%	1%	0%	1%		
People	0%	0%	0%	6%	0%	0%	0%	0%	1%	<1%		
Music	1%	0%	0%	0%	0%	0%	1%	0%	0%	<1%		
KHMR	6%	9%	2%	0%	10%	5%	1%	12%	12%	7%		
Outdoor Activities	2%	5%	2%	0%	0%	8%	1%	4%	2%	3%		
Golf	0%	3%	2%	0%	0%	2%	2%	0%	4%	2%		
Bad Roads/Weather/Difficult Driving	1%	1%	2%	0%	3%	2%	0%	0%	2%	1%		

		Origin					Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Prompted Awareness	Have Always Known About It	71%	74%	18%	5%	5%	31%	49%	41%	50%	46%	29%	49%
	Word Of Mouth Recommendation	38%	44%	40%	10%	21%	40%	23%	37%	44%	34%	23%	23%
	I or My Family Used To Live In Golden	10%	7%	11%	2%	6%	9%	4%	19%	6%	7%	5%	3%
	Internet Search	14%	21%	16%	13%	13%	17%	13%	17%	21%	16%	15%	12%
	Magazine Or Newspaper Article	7%	4%	5%	3%	0%	6%	2%	5%	6%	4%	6%	3%
	Golden Travel Planner Or Other Tourism Literature	6%	6%	5%	2%	4%	6%	6%	3%	5%	5%	5%	3%
	Specialist Activity Website Or Print Publication	5%	6%	8%	2%	4%	9%	5%	3%	8%	5%	4%	2%
	Tour Operator Brochure/ Itinerary	5%	6%	6%	3%	4%	7%	3%	4%	7%	5%	<1%	<1%
	Travel Guide Such As Lonely Planet/ Frommer's	2%	2%	2%	0%	4%	2%	5%	2%	1%	2%	2%	NA
	Consumer Show - Edmonton Snowmobile And Power Sports Show	2%	1%	0%	0%	0%	2%	0%	0%	1%	1%	<1%	<1%
	Consumer Show - Calgary Outdoor Adventure Show	0%	1%	0%	0%	0%	0%	2%	0%	0%	<1%	<1%	<1%
	Consumer Show - Saskatoon Snowmobile Show	0%	0%	1%	0%	0%	0%	0%	1%	1%	<1%	<1%	NA

	Origin					Accommodation				Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Sports Team, Activity Group Or Club Event	1%	0%	1%	0%	0%	1%	0%	0%	0%	<1%	<1%	<1%
Highway Signage	7%	11%	5%	2%	1%	4%	6%	5%	5%	6%	4%	3%
Highway Billboard Advertising	6%	7%	5%	2%	0%	2%	5%	4%	3%	5%	4%	2%
Parks Canada Website	3%	3%	0%	2%	5%	4%	2%	6%	3%	3%	NA	NA
None Of The Above	0%	0%	4%	2%	3%	0%	1%	2%	2%	1%	1%	<1%

		Origin					Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Information Sources	I Didn't Do Any Research	52%	50%	28%	35%	30%	30%	48%	30%	28%	42%	24%	43%
	Word Of Mouth Referrals	8%	15%	27%	21%	26%	25%	13%	19%	18%	18%	15%	4%
	Online Search Engine (Google, Bing, Yahoo Etc.)	33%	33%	42%	45%	38%	46%	35%	53%	44%	36%	NA	NA
	Tourism Golden Website	13%	10%	17%	10%	12%	13%	11%	22%	16%	12%	8%	6%
	Trip Advisor	11%	8%	17%	19%	16%	18%	17%	15%	13%	12%	8%	5%
	KHMR Website	18%	20%	27%	11%	23%	18%	8%	23%	44%	20%	17%	6%
	Travel Guide Such As Lonely Planet/ Frommer's	3%	1%	2%	3%	21%	10%	9%	6%	2%	5%	3%	2%
	Kootenay Rockies Tourism Website Or App	1%	1%	4%	2%	3%	2%	2%	2%	3%	2%	<1%	<1%
	Golden Travel Planner	3%	3%	4%	3%	5%	5%	3%	7%	4%	4%	3%	2%
	Consumer Show	0%	1%	1%	0%	4%	0%	2%	1%	1%	1%	NA	<1%
	BC Visitor Centre	5%	8%	22%	18%	15%	17%	10%	12%	4%	11%	3%	<1%
	Specialist Activity Website Or Print Publication	4%	4%	8%	6%	7%	9%	3%	10%	4%	5%	3%	<1%
	HelloBC Website	1%	1%	4%	2%	7%	5%	1%	2%	2%	2%	1%	2%
	DBC Vacation Planner	2%	2%	6%	5%	5%	4%	1%	6%	5%	3%	<1%	<1%
DBC Outdoor Adventure Guide	4%	0%	5%	0%	4%	2%	3%	3%	2%	2%	<1%	<1%	

	Origin					Accommodation				Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
DBC Approved Accommodation Guide	1%	0%	1%	0%	2%	2%	1%	1%	0%	1%	<1%	<1%
Kootenay Rockies Golf Vacation Guide	1%	1%	1%	0%	5%	0%	2%	1%	4%	1%	<1%	<1%
Online Booking Agent (E.G. Expedia, Booking.Com Etc.)	3%	2%	4%	6%	10%	3%	10%	5%	2%	4%	5%	<1%
None Of The Above	1%	0%	0%	0%	2%	0%	0%	0%	1%	<1%	1%	<1%
Parks Canada Website	5%	3%	2%	10%	19%	10%	10%	6%	5%	7%	4%	<1%

		Origin					Accommodation				Annual		
		BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Likelihood of Return	Definitely	49%	62%	41%	16%	17%	48%	37%	48%	49%	44%	50%	55%
	Probably	37%	28%	33%	40%	23%	24%	36%	31%	29%	31%	33%	28%
	Somewhat Likely	12%	10%	23%	39%	36%	20%	22%	18%	19%	20%	14%	10%
	Not At All Likely	3%	0%	4%	5%	24%	7%	6%	3%	4%	6%	4%	7%
Likelihood of Recommendation	Definitely	38%	48%	54%	32%	37%	57%	29%	57%	60%	43%	54%	58%
	Probably	35%	32%	30%	35%	32%	31%	34%	33%	26%	33%	32%	25%
	Somewhat Likely	20%	14%	14%	26%	21%	12%	29%	9%	12%	18%	13%	12%
	Not At All Likely	8%	6%	1%	6%	10%	0%	8%	1%	1%	6%	2%	5%
Expectations	Exceeded Expectations	28%	36%	40%	34%	32%	45%	28%	37%	42%	34%	39%	39%
	Met My Expectations	59%	53%	45%	48%	49%	43%	49%	52%	47%	52%	53%	48%
	Not Sure Yet	13%	12%	16%	16%	19%	11%	23%	11%	11%	14%	8%	10%
	Did Not Meet Expectations At All	0%	0%	0%	2%	0%	0%	0%	0%	0%	<1%	<1%	3%

Comment about Return Visit	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Usual Stop On Journey	21%	22%	9%	7%	5%	4%	28%	6%	7%	16%		
Beautiful Little Town/Scenery/Love It/Lovely/Enjoyed Time	13%	17%	18%	11%	5%	8%	10%	12%	18%	14%		
Family/Friends In The Area	12%	10%	25%	5%	12%	29%	3%	25%	11%	12%		
Not Sure Yet/Maybe/Not Sure When	4%	6%	4%	9%	24%	6%	15%	4%	5%	9%		
Will Come Back To Ski/Snowboard	7%	10%	5%	14%	1%	10%	1%	7%	16%	8%		
Will Be Back Soon/Next Year/Planning A Visit/Traditional To Stop	7%	6%	9%	5%	8%	1%	6%	10%	8%	7%		
Lots Of Other Places To Visit, Inside BC, Canada And Around The World	0%	1%	2%	20%	19%	14%	7%	4%	2%	6%		
Would Like To Explore More Of The Area	5%	3%	9%	14%	1%	3%	11%	3%	2%	5%	NA	NA
Too Far From Home/Live Far Away	1%	2%	9%	5%	16%	8%	3%	3%	8%	5%		
Will Come Back To Mtn. Bike	5%	5%	2%	5%	0%	0%	4%	7%	5%	4%		
Lots To Do/Lots Of Activities	3%	5%	4%	2%	3%	6%	1%	4%	6%	4%		
Great For Short Getaways/Live Close	3%	5%	0%	0%	0%	1%	3%	1%	2%	2%		
Good Access Point/Location	2%	2%	2%	0%	3%	3%	2%	1%	0%	2%		
Will Be Back To Golf	2%	2%	2%	0%	1%	1%	1%	3%	2%	2%		
Will Come Back For Rafting	1%	2%	2%	0%	0%	1%	0%	0%	4%	1%		
Will Come Back For Race Next Year	4%	1%	2%	0%	0%	0%	1%	4%	1%	1%		
Work In Area So Will Be Back	4%	1%	0%	0%	0%	0%	2%	1%	0%	1%		

Comment about Return Visit	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Considering Changing Favourite Spot From Banff/Jasper	1%	1%	0%	0%	1%	3%	1%	0%	1%	1%		
Will Be Back To Sled/Snowmobile	1%	0%	0%	2%	0%	1%	0%	0%	1%	<1%		
Suggestion For Improvement	1%	1%	0%	0%	0%	0%	0%	1%	0%	<1%		
Will Be Back To Hike	0%	0%	0%	2%	0%	0%	0%	0%	0%	<1%		

2015 Golden Summer Visitor Survey

Comment about Recommend	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Just Got Here/Too Soon	35%	20%	16%	28%	35%	9%	38%	10%	16%	26%	NA	NA
Location/Activities In Area	20%	21%	25%	21%	17%	43%	10%	22%	33%	21%		
Will Recommend/Already Recommended	20%	18%	16%	8%	11%	10%	14%	29%	14%	16%		
Scenery/Wildlife/Mountains	3%	7%	18%	15%	20%	12%	13%	22%	7%	11%		
Recommend To Outdoorsy People/Right Person	9%	12%	16%	13%	4%	12%	7%	12%	9%	10%		
Skiing	3%	6%	8%	3%	1%	5%	0%	6%	7%	4%		
Community Spirit/Nice Town/Friendly	2%	3%	0%	8%	8%	5%	5%	4%	5%	4%		
Uncrowded/Less Busy/Not Touristy	2%	2%	0%	3%	6%	5%	3%	2%	2%	3%		
Wont Recommend/Just Passing Through	3%	3%	0%	3%	1%	0%	2%	0%	3%	2%		
Mtn. Biking	0%	4%	4%	0%	0%	2%	1%	2%	7%	2%		
KHMR	5%	2%	0%	0%	1%	0%	1%	6%	3%	2%		
Rafting	0%	1%	0%	3%	4%	2%	3%	2%	0%	1%		
Good Stopover	3%	1%	2%	0%	1%	2%	3%	0%	0%	1%		
Recommend Specific Hotel/Restaurant/BCVC	2%	1%	2%	0%	3%	2%	1%	0%	0%	1%		
Golf	3%	1%	0%	0%	1%	2%	1%	0%	3%	1%		
Hiking	0%	2%	0%	3%	1%	3%	0%	0%	2%	1%		
Good Service	2%	1%	0%	0%	1%	0%	2%	2%	0%	1%		
Summer Music/Music	0%	2%	0%	0%	0%	0%	1%	0%	2%	1%		
Lots Of Friends Pass Through/Hidden Gem	0%	2%	0%	0%	0%	0%	2%	0%	0%	1%		
ATVing	0%	0%	0%	3%	0%	2%	0%	0%	0%	<1%		
Fishing	0%	1%	0%	0%	0%	0%	0%	0%	0%	<1%		
Won't Recommend/Just Passing Through	0%	0%	0%	0%	0%	0%	0%	0%	0%	<1%		

Comment about Expectations	Origin						Accommodation			Annual		
	BC	AB	Other Canada	USA	OVS	Front Country	Highway 1	DWTN	KHMR	2015	2014	2013
Fun/Good Visit/Nice/Like Area	15%	24%	24%	24%	13%	23%	12%	25%	30%	21%		
Good Experience At Specific Business/BCVC	15%	16%	16%	38%	23%	7%	24%	4%	14%	19%		
Don't Know Yet/Early/So Far So Good	18%	19%	20%	14%	7%	20%	15%	13%	11%	16%		
Nice Town/Second Home/Hidden Gem	15%	3%	12%	5%	7%	7%	12%	0%	14%	8%		
Friendly/Nice People	3%	8%	4%	5%	13%	7%	3%	13%	11%	7%		
Beautiful/Scenery/Wildlife/Nature	3%	3%	8%	10%	13%	0%	12%	17%	5%	6%		
Consistently Good/Expect Good Experience	12%	3%	4%	0%	10%	13%	0%	17%	3%	6%	NA	NA
Poor Weather	6%	8%	0%	5%	0%	0%	3%	8%	8%	5%		
Just Passing Through	3%	10%	0%	0%	0%	0%	9%	0%	3%	4%		
Good Variety Of Activities	6%	3%	0%	0%	7%	0%	6%	17%	0%	4%		
Other/Unrelated	6%	3%	4%	0%	3%	13%	3%	0%	3%	4%		
Great Mtn. Biking	0%	3%	4%	0%	7%	7%	0%	0%	5%	3%		
Good Weather	0%	2%	0%	0%	3%	0%	3%	0%	0%	1%		
Whitewater Rafting	0%	2%	4%	0%	0%	0%	0%	0%	5%	1%		
Not Much Going On	6%	0%	0%	0%	0%	0%	0%	0%	5%	1%		
Location	0%	0%	0%	0%	3%	3%	0%	0%	0%	1%		
Need More Signage	0%	0%	4%	0%	0%	0%	0%	0%	0%	1%		

Appendix B. Questionnaire

Question	Responses
Location survey was taken	<ul style="list-style-type: none"> • Highway 1 corridor • Downtown Golden • Kicking Horse Mountain Resort • Farmers Market • Destination BC Visitor Centre • Other:
Hello, my name is ____ and I am conducting a survey on behalf of Tourism Golden to help better serve visitors to Golden and the surrounding area. Have you got 8 minutes or less to answer some questions?	<ul style="list-style-type: none"> • Yes • No
<i>Validation: If answer is "No" then survey will end.</i>	
Before we start the survey, please confirm the following:	<ul style="list-style-type: none"> • I am 19 years or over AND I have not taken this survey before • I am under 19 years OR I have taken this survey before
Validation: If answer is "I am under 19 years OR I have taken this survey before" then survey will end.	
In order to determine if you are a visitor please select one of the following:	<ul style="list-style-type: none"> • A visitor staying in Golden for 0 to 29 days • A seasonal visitor staying for 30 days or more • A resident of Golden • A property owner in Golden or Kicking Horse, but not resident
<i>Validation: If answer is not "A visitor staying in Golden for 0 to 29 days" then survey will end</i>	
Which of the following age categories applies to you	<ul style="list-style-type: none"> • 19 - 25 • 26- 34 • 35 - 44 • 45 - 54 • 55 - 64 • 65 or older • Decline to answer
What is your gender?	<ul style="list-style-type: none"> • Female • Male • Other
Do you live in North America (Canada or USA)?	<ul style="list-style-type: none"> • Yes • No
Which Province/State are you from?	List

Question	Responses
<p><i>Validation: This question is only asked if "Do you live in North America" is Yes.</i></p> <p>In which city or region are you resident in Alberta?</p> <p><i>Validation: This question is only asked if Province is Alberta.</i></p>	<ul style="list-style-type: none"> • Calgary • Edmonton • Red Deer • Bow Valley • Fort McMurray • Lethbridge • Other
<p>Where are you resident in B.C.?</p> <p><i>Validation: This question is only asked if Province is British Columbia.</i></p>	<ul style="list-style-type: none"> • Columbia Valley • Okanagan Valley • Lower Mainland • Other BC
<p>You are not from N. America so where in the world do you live?</p> <p><i>Validation: This question is only asked if "Do you live in North America" is No.</i></p>	<ul style="list-style-type: none"> • United Kingdom • Germany • Europe - Other • Australia or New Zealand • Asia Pacific • Middle East • Netherlands • Switzerland • Other
<p>Who are you travelling with?</p>	<ul style="list-style-type: none"> • On my own • With spouse or partner • With family members INCLUDING children • With family members NOT including children • With friends • With an organized leisure tour group • Part of an organized business conference or event • Business associates • Other
<p>Have you visited Golden before?</p>	<ul style="list-style-type: none"> • Yes in the winter • Yes in the summer • Yes both winter and summer • No
<p>What is the primary reason for your visit to Golden? Select only one main reason.</p>	<ul style="list-style-type: none"> • Convenient location to stop en-route to another destination • Corporate meeting or event • Getting married or attending a wedding • Visiting friends or family

Question	Responses
	<ul style="list-style-type: none"> • Visiting national parks • Festival or concert • Hiking • Golf • Family vacation • Relaxation • Swiss Guides and other heritage • Mountain biking • Whitewater rafting • Other watersport (e.g. kayaking, canoeing, Stand Up Paddleboard) • Sightseeing/nature/wildlife • Included in touring itinerary • Resort skiing at Kicking Horse Mountain Resort • Cross Country ski • Snowmobiling • Backcountryskiing / touring • Cat or heli-skiing • Summer Kicks Concert • Via Ferratta • Other
<p>Where was the festival or concert?</p> <p><i>Validation: This question is only asked if "Primary reason for your visit to Golden" is Festival or concert.</i></p>	<ul style="list-style-type: none"> • Spirit Square • Civic Centre • Rockwater • Peaks Grill • River House • Taps • Other
<p>During this visit, how many nights are you staying in Golden?</p>	<ul style="list-style-type: none"> • Day Visit • 1 night • 2 nights • 3 nights • 4 nights • 5 nights • 6 nights • 7 - 13 nights • 14 nights or more
<p>What is your total trip length, i.e. nights away from home</p>	<ul style="list-style-type: none"> • 1 night • 2 nights

Question	Responses
	<ul style="list-style-type: none"> • 3 nights • 4 nights • 5 nights • 6 nights • 7 - 13 nights • 14 or more nights
<p>What is the location of your accommodation or camping?</p> <p><i>Validation: This question is only asked if “how many nights are you staying in Golden” is not Day Visit.</i></p>	<ul style="list-style-type: none"> • Kicking Horse Mountain Resort • Golden downtown • Golden adjacent to Highway 1 • Front Country (Blaeberry Valley/ Columbia Valley/ Golden West) • Other:
<p>What type of accommodation are you staying in?</p> <p><i>Validation: This question is only asked if “how many nights are you staying in Golden” is not Day Visit</i></p>	<ul style="list-style-type: none"> • Friends/relatives • Hotel/Motel • Bed & Breakfast • Cabin or chalet • Condo / self catering hotel • Campground • Hostel • Vacation Home – rental • Vacation Home – my own • Backcountry lodge
<p>What have you or members of your group done, or are planning to do during your stay in Golden. Select as many as apply.</p>	<ul style="list-style-type: none"> • Ate in a local restaurant • Visited a pub or bar • Shopped locally for gifts or clothing • Shopped for groceries • Visited Farmers Market • Bought gas • Attended a festival or concert • Attended a Summer Kicks Event • Visited Kicking Horse Pedestrian Bridge • Visited the Art Gallery of Golden • Visited the Golden Museum • Hiking around Golden / KHMR • Hiking at Glacier or Yoho national parks • Walked or cycled the Rotary trails • Visited Northern Lights Wolf Centre • Visited Grizzly Bear Refuge/ KHMR

Question	Responses
	<ul style="list-style-type: none"> • Mountain biking • Golf • Whitewater rafting • Canoeing or Kayaking • Visited Columbia Wetlands • Paragliding • Sky diving • Horse riding • ATV tour • Fishing • Cross Country Ski • Snowmobiling • Ski/snowboard at Kicking Horse Mountain Resort • Ski/Snowboard - other resorts • Ski touring/back country • Heli or cat ski • Snowshoeing • Did not/will not do any of the listed activities • Attended hockey game • Ice-skating • Via Ferrata
<p>Approximately how much did your party spend PER DAY in Golden (excluding accommodation)</p>	<ul style="list-style-type: none"> • Under \$50 • \$50 - \$99 • \$100 - \$149 • \$150 - \$199 • \$200 - \$299 • \$300 - \$399 • \$400 - \$499 • \$500 - \$999 • \$1000 - \$1199 • \$1200 - \$1499 • \$1500 +
<p>What was your mode of transport to Golden?</p>	<ul style="list-style-type: none"> • Private vehicle • Rental vehicle • Greyhound bus • Tour bus • Shuttle bus • Private plane / helicopter

Question	Responses
Did you know about Golden before planning this visit?	<ul style="list-style-type: none"> • Other • Yes • No
What did you know about Golden before this visit?	<ul style="list-style-type: none"> • Free Text
<i>Validation: This question is only asked if “Did you know about Golden before planning this visit” is Yes.</i>	
What made you aware of Golden? Select as many from the list.	<ul style="list-style-type: none"> • Have always known about it • Word of mouth recommendation • I or my family used to live in Golden • Internet search • Magazine or newspaper article • Golden Travel Planner or other tourism literature • Specialist activity website or print publication • Tour operator brochure/ itinerary • Travel Guide such as Lonely Planet/ Frommers • Consumer show -Edmonton Snowmobile and Power Sports Show • Consumer Show - Calgary Outdoor Adventure Show • Consumer show - Saskatoon Snowmobile Show • Sports team, activity group or club event • Highway signage • Highway billboard advertising • None of the above • Parks Canada website
Where and how did you research Golden and plan your trip? Select all that apply.	<ul style="list-style-type: none"> • I didn't do any research • Word of mouth referrals • Online search engine (Google, Bing, Yahoo etc.) • Tourism Golden website • TripAdvisor • Kicking Horse Mountain Resort Website • Travel Guide such as Lonely Planet/ Frommers • Kootenay Rockies Tourism website or app • Golden Travel Planner • Consumer show • BC Visitor Centre • Specialist activity website or print publication

Question	Responses
	<ul style="list-style-type: none"> • HelloBC website • Destination BC Vacation Planner • Destination BC Outdoor Adventure Guide • Destination BC Approved Accommodation Guide • Kootenay Rockies Golf Vacation Guide • Online booking agent (e.g. Expedia, Booking.com etc.) • None of the above • Parks Canada website
How likely are you to visit Golden again?	<ul style="list-style-type: none"> • Not at all likely • Somewhat likely • Probably • Definitely • Please help us understand why you selected this answer (Free Text)
How likely are you to recommend Golden as a vacation destination?	<ul style="list-style-type: none"> • Not at all likely • Somewhat likely • Probably • Definitely • Please help us understand why you selected this answer
How did your visit to Golden meet your expectations?	<ul style="list-style-type: none"> • Did not meet expectations at all • Met my expectations • Exceeded expectations • Not sure yet • Please help us understand why you selected this answer
Are you willing to participate in a follow up survey?	<ul style="list-style-type: none"> • Yes • No • Email Address
<p>Thank you for your time. Would you like to receive an e-newsletter from Tourism Golden with information about news and events in Golden?</p> <p>Your personal information is for use by Tourism Golden only and will not be shared with any other organization.</p>	<ul style="list-style-type: none"> • Yes • No • Email Address

Appendix C. Alberta Origin Communities

Other Alberta (n = 51)	%
St. Albert	10%
Cochrane	8%
Medicine Hat	8%
Grande Prairie	6%
Athabasca	4%
Drumheller	4%
Okotoks	4%
Slave Lake	4%
Airdrie	2%
Alex	2%
Belleview	2%
Black Diamond	2%
Bragg Creek	2%
Brooks	2%
Camrose	2%
Cold Lake	2%
Didsbury	2%
Drayton Valley	2%
Edson	2%
High Level	2%
Hinton	2%
Innisfail	2%
Jasper	2%
Killam	2%
Lac La Biche	2%
Lacombe	2%
Mayerthorpe	2%
Pincher Creek	2%
Ponoka	2%

Rocky Mountain House	2%
Sundre	2%
Sylvan Lake	2%
Three Hills	2%
Vermillion	2%
Whitecourt	2%