Tourism Golden
Highlights from the 2018 Annual Report
Presentation to CSRD Board | June 20th, 2019
Build on a strong brand  
Identify & own unique selling propositions  
Create, curate and communicate  
Educate & collaborate  
Inform & evaluate
2018 FY
ORGANISATIONAL BUDGET

- WAGES & ADMIN.
  - 29%

- MARKETING & PROMOTION
  - 71%
“2018 was the best year ever for international arrivals to Canada with 21.13 million tourists, breaking the 21 million mark for the first time”
DISRUPTERS

- BC wildfires
- Pipeline dispute
- Labour Shortages

“...we will not be coming out to BC for our golf trip this year. Some of our group do not want to spend their money in BC ......”
2018 HIGHLIGHTS

- 9th consecutive year of growth
- 7% increase in total revenues
- 7% increase in MRDT revenues
- $100k Google Search Grant ad
- 13% increase in ADR
- Growth in winter spring & fall seasons
- Average length of stay summer 2.8 nights
- Average length of stay winter 3.2 nights
INDUSTRY COLLABORATION

- Destination Development
  - Highway 1 Field to Kamloops & Sun Peaks
  - Kootenay Rockies Regional

- Research
  - Golden Snowmobile Club Economic Impact study

- Regional & Activity Sector Marketing Consortiums
  - Kootenay Dirt
  - Kootenay XC
  - Sled Kootenay
  - Fishing BC
- Stakeholder programs
  - Co-op marketing opportunities
  - Pro-D workshops

- Communications
  - Monthly news 50% open rate
LEAD ORGANISATION FOR TOURISM

- Representing tourism in Golden
  - KHCP4 Community Liaison Committee
  - CV, Hwy 1 & KR Destination Development projects

- Advocacy
  - STR legislation
  - Labour shortages
GROW VISITATION & TOURISM REVENUES

Monthly Percent Change - 2018


- Occupancy
- RevPAR
INCREASE ECONOMIC BENEFIT

$596 on average, was spent in Golden by each visitor party

**Length of Stay**

<table>
<thead>
<tr>
<th></th>
<th>SUMMER 2017</th>
<th>WINTER 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>Overnight</td>
<td>77%</td>
<td>89%</td>
</tr>
</tbody>
</table>

Avg. Overnight Stay = **2.8** nights

Average Stay = **3.2** nights

$1,481 on average, was spent in Golden by each visitor party
This report provides a comprehensive analysis of what people are saying about your destination online. Insights from this data should guide your strategic planning, marketing and destination development to enable you to shape the way people talk about Golden in the future.
54
Tourism Sentiment Score™ result

55%
1%
Tourism’s Contribution

How does tourism contribute?

Tourism Sentiment Score™
Tourism Sentiment Score is a measure of a Golden’s ability to generate positive word of mouth about its tourism offering. It is an aggregate score that focuses solely on online conversations that reference or affect a potential traveler’s perceptions of a destination’s tourism offering.

Place Sentiment Score
Place Sentiment Score is an aggregate value of all conversations around Golden, whether or not the individual conversations have a direct impact on perceptions of the tourism offering. It captures opinions of all aspects of the destination from politics to real estate.

Key Takeaway:
The gap between these two scores is representative of the impact your destination’s tourism industry is having on the brand of the destination as a whole. Tourism is a substantial driver of a positive overall brand image.
This report provides Golden with a view of how it is perceived and discussed among consumers as a travel destination. Everyone in your destination can influence the levels of positive and negative sentiments about its tourism experiences. Based on our analysis of word of mouth about Golden, we recommend the following actions for your organization.

Core Conversation Drivers
Volume is a good indicator of overall awareness. The more people are talking about a specific experience, the more awareness that drives. It is important to ensure that your top awareness generators remain competitive and make positive impressions. The top drivers of conversation for Golden are:
- Nature Viewing
- Hiking + Rock Climbing
- Skiing + Snowboarding

Potential Growth Opportunities
While these tourism assets may not generate the most volume, they are generating a high level of sentiment. Because of this, these categories potentially present potential for future growth. Among Golden's tourism assets, the following stood out as potential growth opportunities.
- Cycling + Biking
- Skiing + Snowboarding
- Weddings

Under Performing Assets
Not every aspect of your destination needs to be at the top. However, the following assets within Golden fell below the competition for both volume and sentiment.
- Restaurants
- Breweries + Pubs
EVENTS
OVERVIEW BY MARKET (TOP-10)

<table>
<thead>
<tr>
<th>Visibility (h:mm:ss)</th>
<th>100% Media Equivalency (€)</th>
<th>QI Media Value (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>42:56:16</td>
<td>Germany</td>
</tr>
<tr>
<td>Australia</td>
<td>42:25:17</td>
<td>Pan Global</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>37:13:23</td>
<td>Australia</td>
</tr>
<tr>
<td>Slovakia</td>
<td>37:13:23</td>
<td>Switzerland</td>
</tr>
<tr>
<td>Belgium</td>
<td>34:38:40</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>Philippines</td>
<td>32:31:06</td>
<td>Macau</td>
</tr>
<tr>
<td>Myanmar</td>
<td>32:08:24</td>
<td>Bulgaria</td>
</tr>
<tr>
<td>Macau</td>
<td>32:08:24</td>
<td>Japan</td>
</tr>
<tr>
<td>Turkey</td>
<td>31:53:39</td>
<td>Turkey</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>31:30:45</td>
<td>Belgium</td>
</tr>
</tbody>
</table>

TOTAL: 678:10:12
TOTAL: 3,338,322
TOTAL: 677,994
34 features directly resulting from TG activity

Summer Getaway in Golden, B.C.

Experience National Park Wonders Without the Crowds

Golden is situated in the midst of the staggeringly beautiful Yoho National Park. Within a 45-minute drive from Golden, you can access some of the park's greatest wonders, from accessible shops like the eye-poppingly blue Emerald Lake and the falls spilling over Natural Bridge, to more involved hikes that the majestic Wahta Falls. For one, The best part? You get the same level of epic scenery as the Abbey girls, but you won't have to fight through your bus crowds to experience all the natural goodies we're looking at you, Lake Louise. Want to explore more than just Yoho? Golden is also located on easy day trip distance from Banff Jasper, Kootenay, and Mounth Rainier National Parks. That's 6 total parks in sightseeing distance. In other words, the jackpot.

Get VIP Whitewater Rafting Treatment

Summer is prime time for whitewater rafting on the Kicking Horse River, which flows right through Golden. You can paddle off from the shore most of the time, or when the river is at the desired level (typically June and July), you can hop a scenic helicopter ride with Golden Rafting Company and get dropped off at the very best embarkation spot: the lower rapids, known for a continuous 4-kilometer stretch of class IV rapids. How's that for VIP treatment? That's actually totally worth it.
TACTICAL MARKETING

- Multi-channel approach
- Campaigns
  - Spring
  - Fall
  - Winter
  - Heart of the Parks
  - Skiing & boarding
  - Snowmobiling
  - Biking
  - Hiking
  - Fishing

![Advertising Spend by Season](chart.png)
VISITOR SERVICES

How Did You Originally Find Out About Golden Visitor Centre?  

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage of GVC Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visible Site</td>
<td>58%</td>
</tr>
<tr>
<td>Highway Signage</td>
<td>18%</td>
</tr>
<tr>
<td>Google</td>
<td>12%</td>
</tr>
<tr>
<td>Other source</td>
<td>10%</td>
</tr>
<tr>
<td>Directional Signage</td>
<td>9%</td>
</tr>
<tr>
<td>Printed Materials</td>
<td>8%</td>
</tr>
<tr>
<td>Referred by Other Location</td>
<td>3%</td>
</tr>
<tr>
<td>Tourism Golden Website</td>
<td>2%</td>
</tr>
<tr>
<td>WiFi</td>
<td>1%</td>
</tr>
<tr>
<td>Facebook Ads</td>
<td>1%</td>
</tr>
<tr>
<td>Referred by Hotel</td>
<td>1%</td>
</tr>
<tr>
<td>HelloBC</td>
<td>0.5%</td>
</tr>
<tr>
<td>TripAdvisor</td>
<td>0.5%</td>
</tr>
<tr>
<td>Hotel Tent Cards</td>
<td>0.5%</td>
</tr>
<tr>
<td>Referred by Campsite</td>
<td>0.3%</td>
</tr>
<tr>
<td>Movie Theatre</td>
<td>0.2%</td>
</tr>
<tr>
<td>Other Social Media</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Speak with a Visitor Information Counsellor Today?  
Percentage of GVC Visitors

- Yes: 38%
- No: 62%
VISITOR SERVICES

Visitor Information Topics Researched and Obtained in Golden?
Percentage of GVC Visitors

- Attractions: 38%
- Activities: 36%
- Restaurants/Dining: 23%
- Events: 20%
- Accommodations: 13%
- Shopping: 12%
- Transportation: 8%

Evaluation of Quality Ratings
Top Box Results - Percentage of GVC Visitors Responding 4 or 5

- Friendliness and Helpfulness of Staff: 99%
- Cleanliness of Facilities: 98%
- Convenient Location: 98%
- Quality of Facilities: 98%
- Pleasant Atmosphere: 95%
- Overall Experience: 97%

Scale: 1 = Very Poor and 5 = Excellent
INCREASE ECONOMIC BENEFIT

**Extend Stay in Golden due to Information Collected at GVC?**
- No: 86%
- Yes, extra hours: 10%
- Yes, extra nights: 4%

**Participate in New Activities/Places/Events in Golden due to Information Collected at GVC?**
- No: 74%
- Yes: 26%

**Spend Additional Money as a Result?**
- Yes: 41%
- No: 59%

- 3.0 hours average stay extended
- 1-night average stay extended

**Application of Data to June – September 2018 GVC Visitor Party Data Results In:**
- $218,960 spent in Golden due to visitor extension of their current trip.
  - $114,397 due to extra hours
  - $104,563 due to extra nights
- $212,415 spent in Golden due to visitors participating in new activities or going to places/events they didn’t previously know about.
- $5,083,875 potential spend in Golden due to visitors returning on a future overnight trip.

**Likelihood of Future Overnight Trip Due to Information Obtained at GVC?**
- 5 – Very Likely: 33%
- 4: 24%
- 3: 16%
- 2: 8%
- 1 – Not at All Likely: 19%

Total estimated economic benefits due to GVC between June and September 2018: $5,515,251