



Tourism Golden

2024-2025 Stakeholder Survey Report

January 2026



Executive Summary

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Columbia Shuswap Regional District Area A (excluding Yoho National Park) since 2007. In October 2025, TG initiated its fifth stakeholder survey to understand Stakeholder perceptions. The previous stakeholder surveys were conducted in 2016, 2021, 2023 and 2024. Results obtained here will be used to refine the annual planning and program delivery.

APPROACH

ACG Insights/Align Consulting Group worked with TG to develop content for the online survey, as well as administered, conducted analysis and developed this report. This year saw a 45% response rate, up from 39% in 2024 and 41% in 2023. In 2025, community partners (77%) had the highest response rates followed by food and beverage, retail or tourism services (46%), accommodation businesses (40%), and activities/attractions (38%).

RESULTS

GENERAL PERCEPTIONS OF INDUSTRY

- There is a clear consensus among stakeholders regarding the importance of tourism to their business/organization goals and its essential impact on the economies of both Golden and British Columbia.
- The vast majority of stakeholders are supportive of responsible tourism growth in Golden (94% agree) and are confident their staff have the knowledge to provide tourist information to visitors (83%).
- While the majority of stakeholders (57%) feel that tourism development is adequate, the pace of development has mixed reviews as under half (48%) think it is 'just right' but 40% think it is 'too slow'. That said, most stakeholders would like to see visitor growth in the next 5 years.

Executive Summary

TOURISM GOLDEN AWARENESS & PERFORMANCE

- Familiarity with Tourism Golden has slightly decreased compared to 2024 (67% vs. 70% in 2024), that said, the majority of stakeholders are familiar with TG's programs and services.
- Stakeholders are most aware of Tourism Golden's annual publications (78%). Paid print advertising (63%), coordination with regional, sector and provincial marketing activities (61%), media relations (59%), and professional/semi-professional event support (56%) also have high awareness levels.
- Performance on the 8 key objectives identified in the 2022-2027 strategic plan was positive for most statements; however, all except one statement notably decreased compared to 2024. More than half (56%) think that Tourism Golden has done a 'very good' or 'excellent' job at delivering enhanced stakeholder programs and support. That said, there are several areas for improvement, most notably is increasing shoulder season revenue with 9% rating performance as 'poor' and 19% rating it as 'fair'.
- From an operating perspective, the majority of stakeholders rate Tourism Golden as 'very good' or 'excellent' on all presented business performance measures. The top three rated elements are that TG advocates for tourism in Golden and the region (72% rated as 'very good' or 'excellent'), TG is transparent and accountable about its performance (70%), and TG forms partnerships to advance marketing and destination development (65%).
- Tourism Golden's overall performance was strong. In fact, 64% of stakeholders rated TG's overall performance as 'very good' or 'excellent'. Notwithstanding, it is down from 73% in 2024 which saw a large increase from 67% in 2023.

Executive Summary

PRIORITIES MOVING FORWARD

- On the high-level, both Destination Management and Destination Marketing are key to the future of tourism in Golden and both are considered equally essential (38% and 37%, respectively).
- The top priorities overall are to encourage environmental sustainability of tourism in Golden, build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met (90% each). Encouraging economic sustainability of tourism in Golden (89%), pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden) (87%), and supporting the sustainable and responsible growth of visitor volumes and tourism revenues (84%) were also high priorities.
- The largest barriers to tourism growth is housing – both shortages (68% note it is a ‘large’ or ‘extreme barrier’) and affordability (66%) and outdated community planning (68%). Transportation to (62%) and within (55%) Golden are also large barriers to growth.

SUSTAINABILITY INITIATIVES

- Enhancing visitor information and education on responsible and respectful behaviour and attracting and retaining tourism labour were the top-rated sustainability priorities.

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BACKGROUND & OBJECTIVES

Background and Objectives

Tourism Golden (TG) has provided tourism marketing services to the town of Golden and Kicking Horse Country since 2007. The not-for-profit organization's vision is, *'To inspire target visitors to explore and experience Golden'*. In September 2025, TG initiated its fifth stakeholder survey to understand Stakeholder perceptions. The previous stakeholder surveys were conducted in 2016, 2021, 2023 and 2024. Results obtained in 2025 will be used to inform annual planning of the delivery of the 2022-2027 Strategic Plan and is to be included in the annual MRDT reporting.

Similar to previous years, the primary objectives were to:

1. Gather perceptions about the performance of TG, and
2. Capture ideas about the future directions of tourism in Golden and TG.

A few elements to understand when reading this report include:

- Where possible, results were compared to 2024 findings.
- TG's primary funding comes from 3% Municipal and Regional District Tax (MRDT) rate. The MRDT is collected by accommodation businesses. Being the recipient of the 3% MRDT, TG is required to conduct an annual stakeholder survey to assess the level of awareness of tourism marketing activities, and satisfaction with the use of MRDT funds.
- Verbatim comments are available under a separate cover.

METHODOLOGY

Methodology - Approach

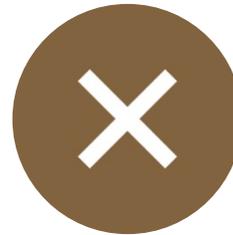
- ACG Insights/Align Consulting Group (ACG) has provided research support to TG since 2016. In this case, ACG provided survey administration, data cleaning, analysis and report writing.
- In 2023, ACG worked with TG to overhaul the content for the stakeholder survey and used the Destination BC's MRDT Stakeholder Survey Guidebook¹ was used to assist in questionnaire development. In 2024 and 2025, minor changes were made therefore most questions are comparable with the previous years. This year, several truncated versions of the survey was available to different stakeholder types due to the nature of their relationship with Tourism Golden.
- TG provided ACG with an email distribution list of 235 emailable stakeholders and 21 of those were removed because they were duplicates, closed or the email address was undeliverable. This resulted in 214 stakeholders that were sent the stakeholder survey via email.
- These stakeholders were sent the survey via email. To encourage responses, two email reminders were sent. In addition, a personalized follow up email was sent from Align's email as well as one directly from Tourism Golden. The survey was available between October 23, 2025 and November 21, 2025.
- For response rate analysis, stakeholders were grouped into 4 groups, including:
 1. Accommodations
 2. Activity or Attractions
 3. Food and Beverage, Retail or Tourism Services
 4. Community Group, Non-Profit or Local Government (Community Partners)

Small sample sizes inhibited further analysis by these groups.

Methodology - Analysis



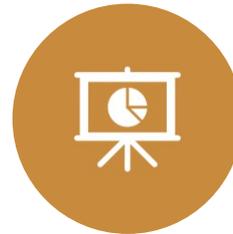
Responses were summarized with percentages.



Don't Know/Not Applicable were removed from analysis.



'Top Box' analysis was conducted for scale questions. This means the top two responses were added together.



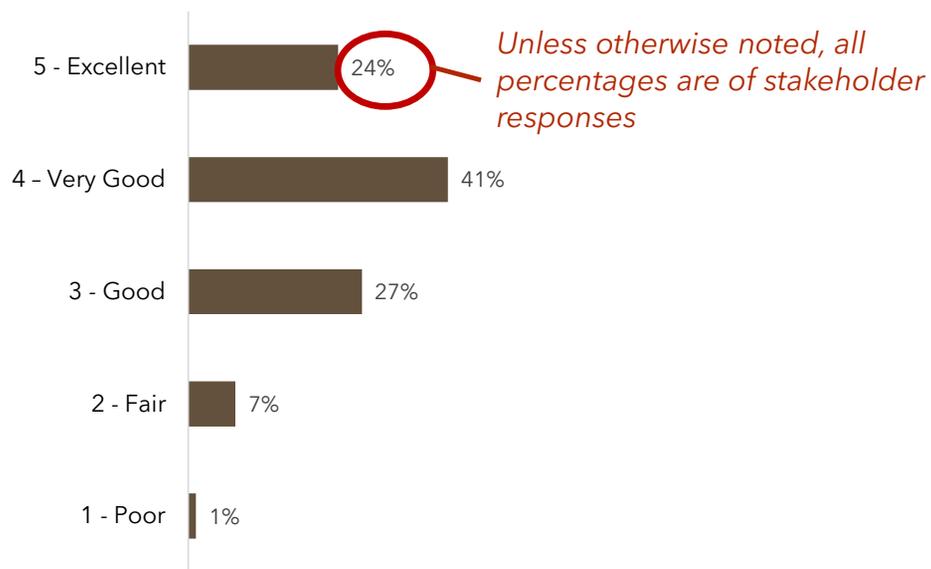
- Where possible, comparisons to 2024 and 2023 were made.
-Differences were noted if 'top box' responses were more than 5% different.

Methodology - Analysis

TIPS FOR READING

Tourism Golden Overall Performance

(% of Stakeholders)



Open-Ended Responses

Several questions were asked with open-ended responses. Verbatim responses are summarized in *MVBoli* font. For the most part, they have not been edited and are meant to provide more depth to understanding the stakeholder perspective.

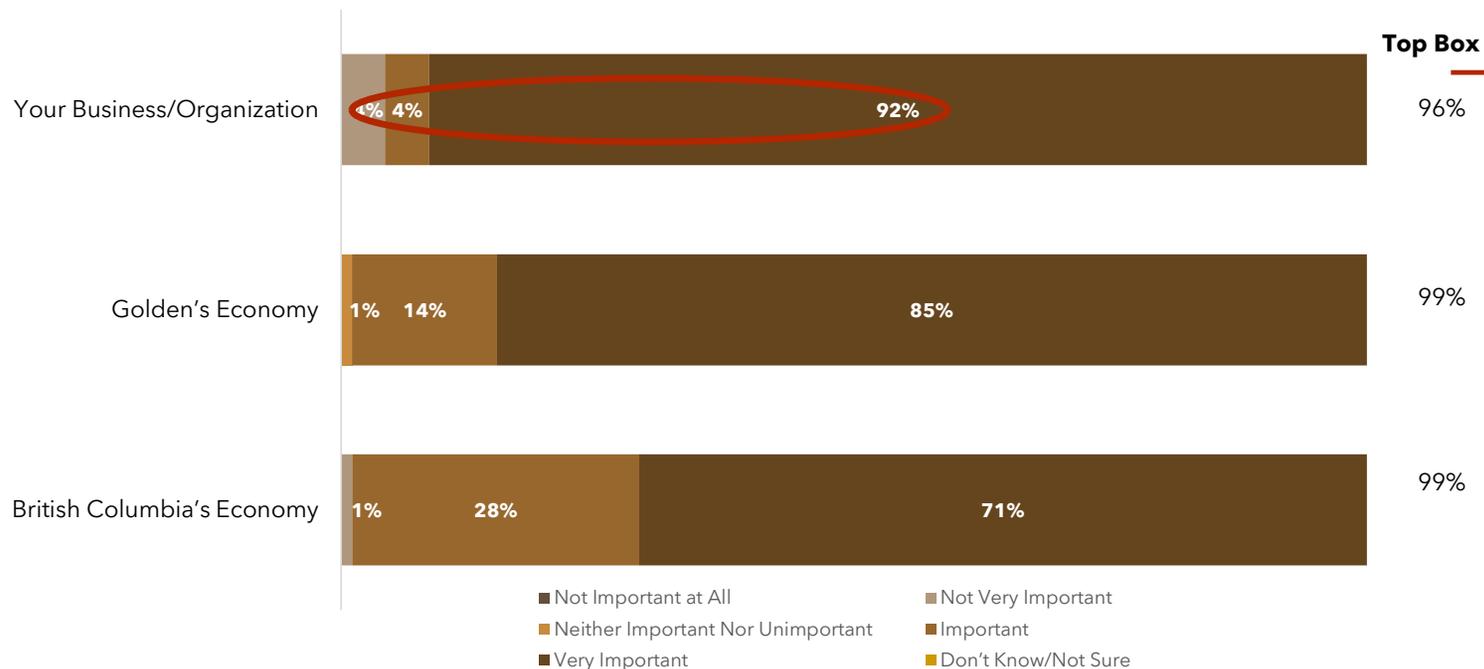
The actual question is included as the footer of the slide. Also, this section includes the number of responses (n) and analysis details. The entire questionnaire is also in the appendix.

Taking everything into account, how would you rate the overall performance of Tourism Golden? Scale: 1 = Poor, 5 = Excellent, n = 81.

Methodology - Analysis

TIPS FOR READING

Importance of Tourism Industry
(% of Stakeholders)



Top Box
— *Top Box analysis is equal to the percentage of the top two response categories. In this example the top box is 96%. The top box is also listed to the right of the chart.*

How important is the Tourism industry to the following? Scale: 1 = Not Important At All, 5 = Very Important, n=47-93.

Methodology - Survey Responses

- In total, there were 97 responses. This equals a 45% response rate. Up 6 percentage points from 39% in 2024 and 4 percentage points from 41% in 2023.
- The distribution of stakeholders as well as the response rate for each group are detailed below.

STAKEHOLDER GROUPS	NUMBER OF STAKEHOLDERS (% All Stakeholders)	NUMBER OF RESPONSES (% All Responses)	RESPONSE RATE
Accommodations	92 (43%)	37 (38%)	40%
Activities and Attractions	39 (18%)	15 (15%)	38%
Food and Beverage, Retail and Tourism Services	61 (29%)	28 (29%)	46%
Community Partner	22 (10%)	17 (18%)	77%
TOTAL	214	97	45%

RESULTS

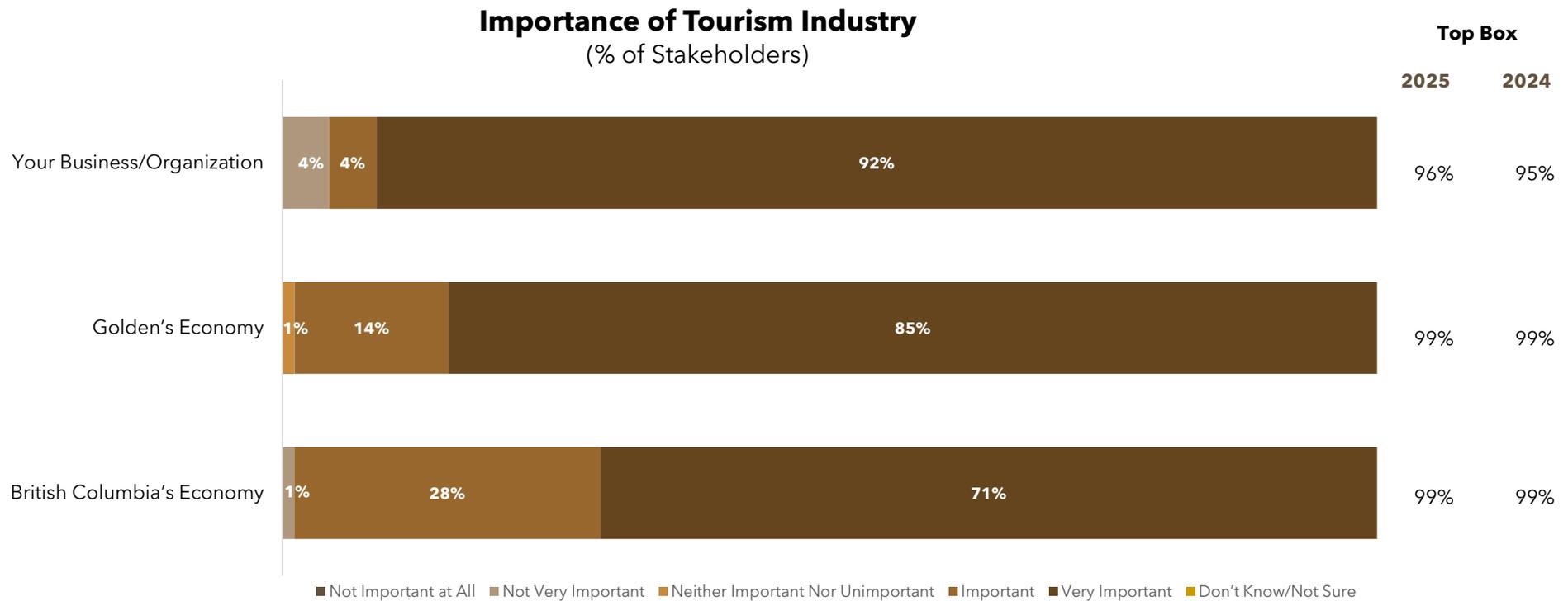
General Perceptions About the Tourism Industry

Importance of the Tourism Industry

Stakeholders were asked how important is the Tourism industry on three aspects.

- Overall, nearly all stakeholders view tourism as 'important' or 'very important' for their business/organization (96%), Golden's economy (99%), and British Columbia's economy (99%).
- Looking at it in more detail we see that 92% note that tourism is 'very important' to their business/organization. More than eight-in-ten (85%) agree that tourism is 'very important' to Golden's economy, while 71% think it is 'very important' to BC's economy.

Importance of the Tourism Industry



Agreement with Tourism Golden

Stakeholders were asked to rate their level of agreement with three statements about Tourism Golden and the Tourism industry.

- The vast majority of stakeholders say that as a business/organization they support responsible tourism growth (94% 'somewhat' or 'strongly' agree).
- The majority agree that their staff has enough knowledge to provide tourists with information on attractions, events and other tourist opportunities happening in the area (83% 'somewhat' or 'strongly' agree).
- Nearly six-in-ten stakeholders agree with the amount of tourism development in Golden being adequate with 57% 'somewhat' or 'strongly' agreeing while 27% 'somewhat disagree' and 4% 'strongly disagree' with this statement.

Agreement with Tourism Golden

Agreement with Tourism Golden
(% of Stakeholders)

Top Box

2025 2024

As a business, I/we believe the current amount of tourism development in Golden is adequate



57% 60%

As a business, I/we support responsible tourism growth



94% 99%

As a business, our staff have enough knowledge to provide tourist with information on attractions, events and other tourist opportunities happening in the area



83% 83%

■ Strongly Disagree ■ Somewhat Disagree ■ Neither Disagree Nor Agree ■ Somewhat Agree ■ Strongly Agree ■ Don't Know/Not Sure

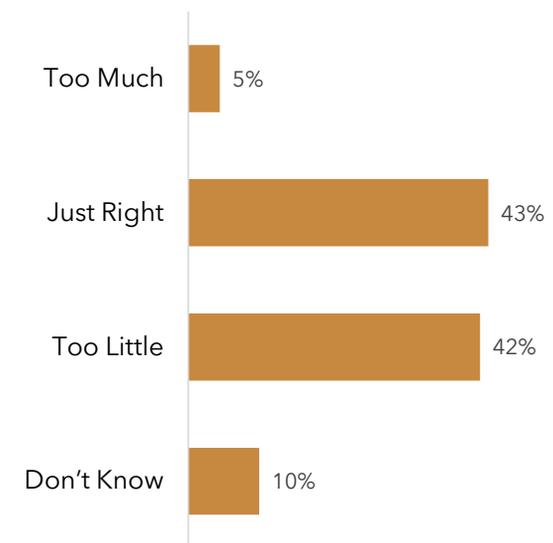
Please rate your level of agreement with the following statements? Scale: 1 = Strongly Disagree, 5 = Strongly Agree, n=77-81.

Current Level of Tourism Development in Golden

Stakeholders were asked their opinion on the current level of tourism development in Golden .

- Less than half of stakeholders are satisfied with the current level of tourism development in Golden. In fact, only 43% say it is 'just right' while 42% feel that there is 'too little' and, in contrast, 5% think there is 'too much'.
- The satisfaction level with the current level of tourism remained the same compared to last year (43% each) and more stakeholders feel that there is 'too little' compared to last year (42% vs. 34% in 2024).

Current Level of Tourism Development
(% of Stakeholders)

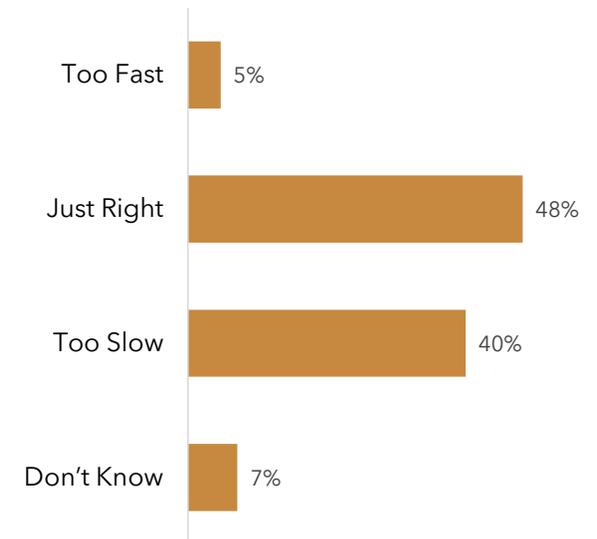


Speed of Tourism Development in Golden

Stakeholders were asked their opinion on the speed of tourism development in Golden.

- Nearly one-half (48%) of stakeholder are content with the speed of tourism development and feel that it is 'just right'.
- That said, four-in-ten (40%) view it as too slow and 5% say development in Golden is too fast.
- The proportion of stakeholders who believed the speed of tourism development was 'just right' remained consistent with the previous year in 2025, increasing by only 2%. In contrast, more believe that it is developing 'too slow' (40% vs. 29% in 2024).

Speed of Tourism Development
(% of Stakeholders)

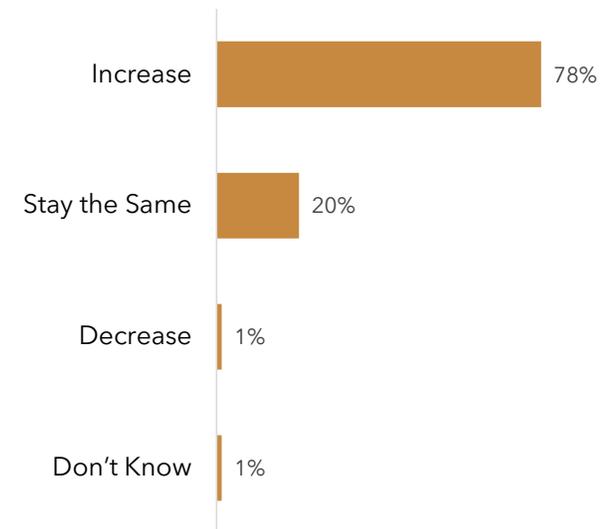


Visitor Volume in Golden in the Next Five Years

Stakeholders were asked their opinion on whether they would like visitor volume in Golden to increase, decrease or stay the same in the next five years.

- Nearly eight-in-ten of stakeholders (78%) want visitors volume to increase in the next five years, with 20% preferring it to stay the same. This desire for growth represents a 9-point increase compared to 2024 (69%) and 15-point increase since 2023 (63%).
- In past results it was observed that interestingly, 5% (2023) and 3% (2024) noted a desire to see fewer visitors. In 2025, only 1% note that they would like to see a decrease in volume of visitors.

Visitor Volume in Golden
(% of Stakeholders)



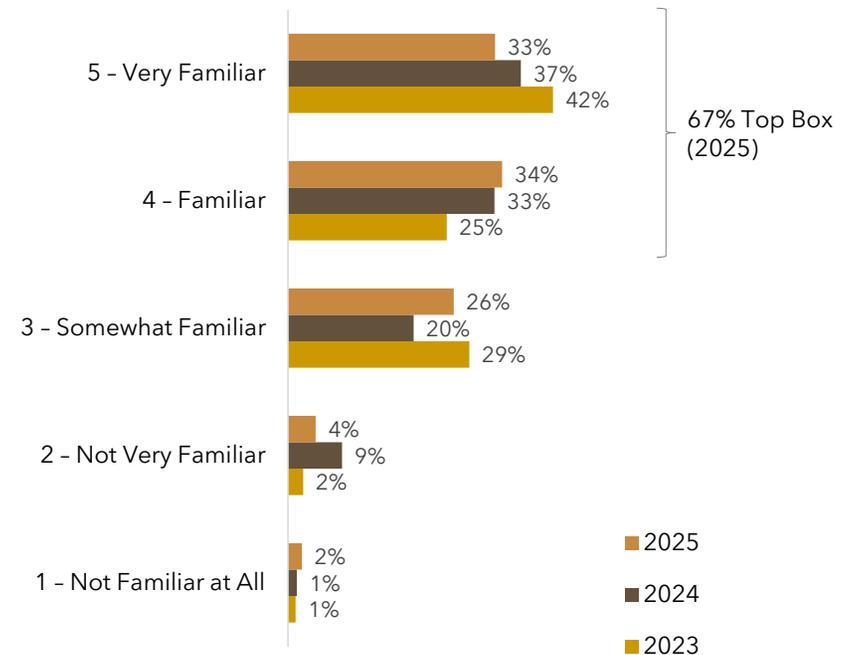
Stakeholder Awareness of Tourism Golden and Its Performance

Familiarity with Tourism Golden

Stakeholders were asked how familiar they were with the services and programs offered by TG.

- A total of 67% of stakeholders were familiar or very familiar with TG.
- While in 2025, the familiarity with Tourism Golden is slightly lower than in 2024 (-3 percentage points) and 2023 (-1 percentage point), Tourism Golden continues doing a good job, at a high-level, at communicating their role to stakeholders.

Familiarity with Tourism Golden
(% of Stakeholders)

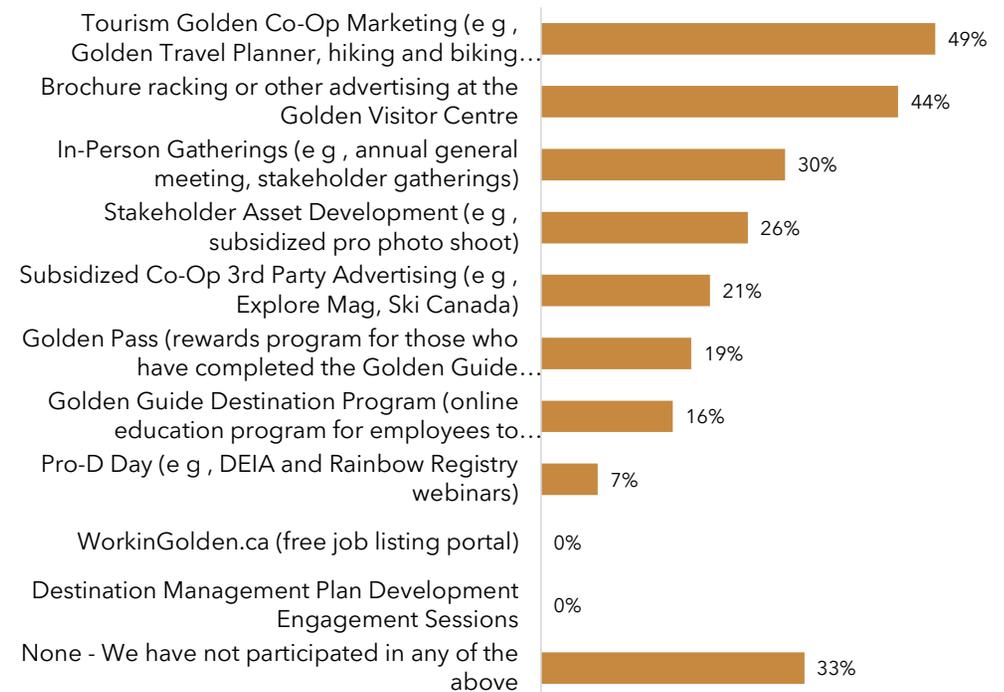


Participation in Tourism Golden Programs

Stakeholders were asked about participation in TG programs.

- 67% of stakeholders participated in at least one TG program.
- The most popular program participation was in TG Co-Op marketing (49% of stakeholders participated), followed by brochure racking or other advertising in the Golden Visitor Centre (44%) and in-person gatherings such as AGM (30%).

Tourism Golden Program Participation
(% of Stakeholders)



Over the past year (November 2024 - October 2025), what Tourism Golden programs has your business or employees participated in, if any? n=43. 43 stakeholders provided 91 responses. The percent totals to more than 100% because stakeholders could participate in multiple programs.

Participation in Tourism Golden Programs

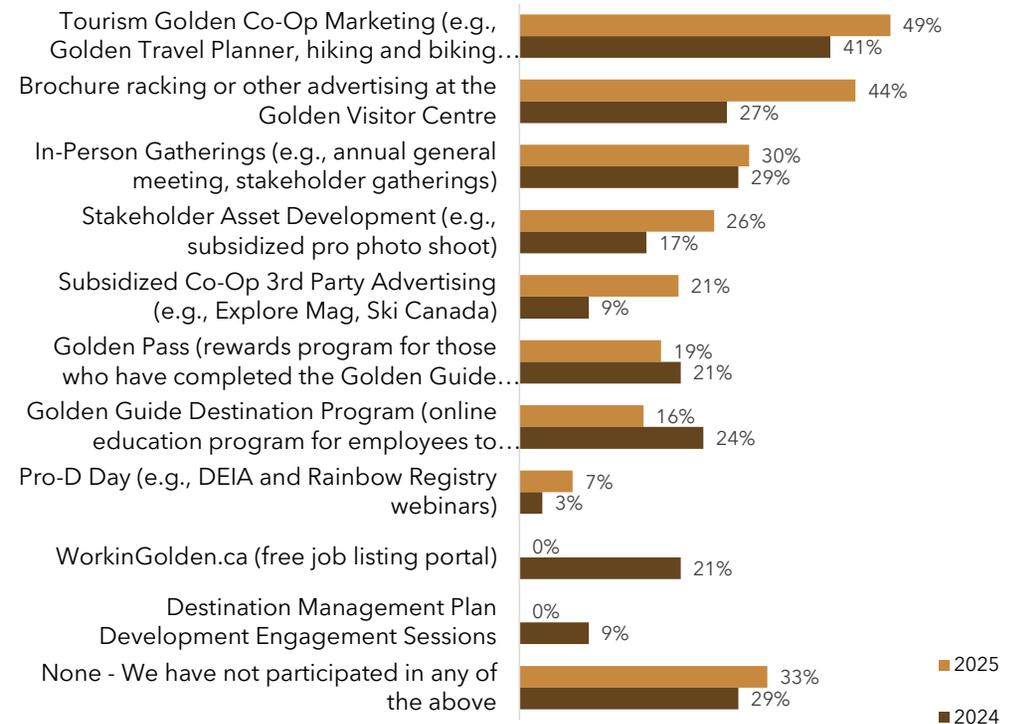
Looking at the comparison between 2025 and 2024 surveys, we see that generally participation among responding stakeholders is mixed. It should be noted that these results are not reflective of actual attendance and rather participation among responding stakeholders.

A slightly lower portion of responding stakeholders did participate in at least one program in 2025 (67% - down from 71% in 2024).

Some of the programs that appear to have some lift over 2024 include:

- Brochure racking (+17 points to 44%);
- Stakeholder Asset Development (+9 points to 26%); and,
- Subsidized Co-Op (+12 points to 21%).
- In contrast in 2025, some programs such as WorkingGolden.ca and Destination Management Plan saw no participation at all, which represent notable declines compared to 2024 (-21 points and -9 points, respectively).

Tourism Golden Program Participation
(% of Stakeholders)



Over the past year, what Tourism Golden programs has your business or employees participated in? n=43 (2025), 43 stakeholders provided 91 responses n=66 (2024), 66 stakeholders provided 113 responses. The 26 percent totals to more than 100% because stakeholders could participate in multiple programs.

Awareness of Tourism Golden Programs

Stakeholders were asked their awareness levels with 13 marketing activities that Tourism Golden has implemented over the past two years (see next page for details).

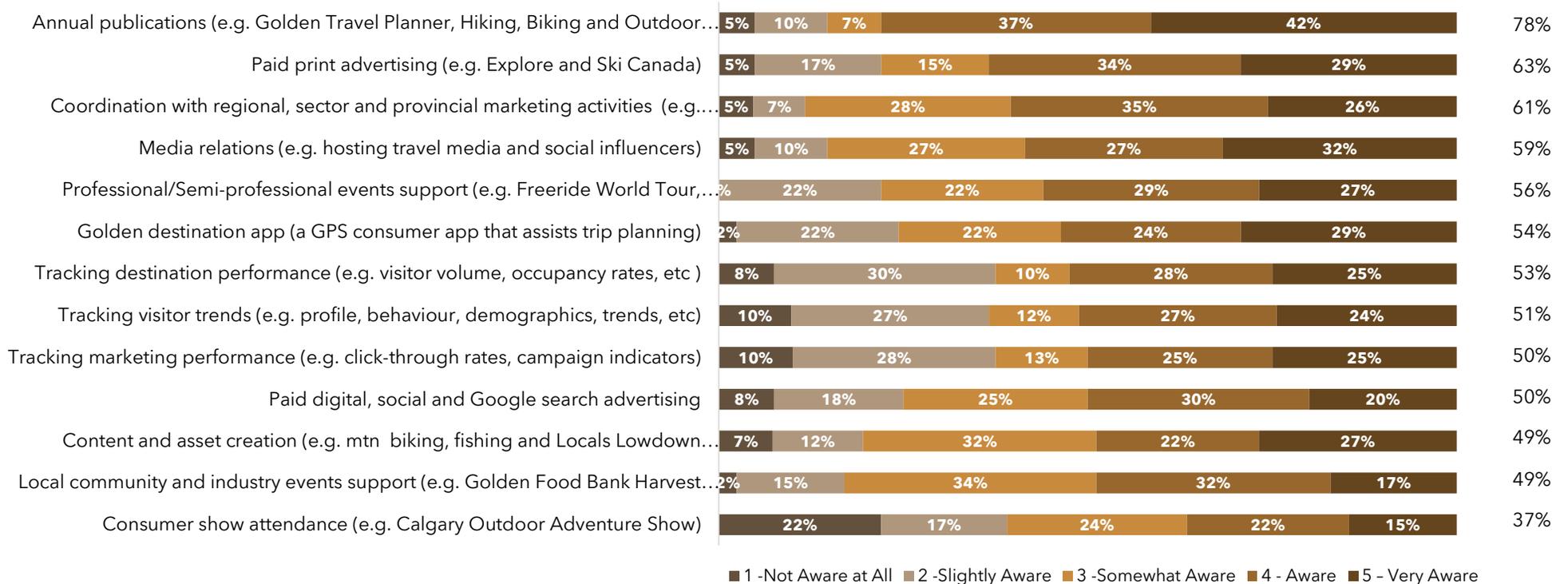
- Overall, stakeholders were most aware of the annual publications (78%), paid print advertising (63%), coordination with regional, sector and provincial marketing activities (61%), media relations (59%), and professional/semi-professional event support (56%). Consumer show attendance (37%) has the lowest awareness amongst stakeholders.
- Similar to last year's results, the marketing activity with the most awareness continue to be annual publications (however 6 percentage point down from 84% in 2024). Overall in 2025, all activities saw declines compared to 2024. It is noteworthy that after being the second activity with the highest awareness in 2024, the Golden Destination App saw a notable decrease of 14 percentage points from 68% last year, placing it in 6th place this year. Professional/semi-professional event support and media relations also saw notable declines compared to 2024 (-13 points and -11 points).

Awareness of Tourism Golden Programs

Awareness of Tourism Golden Marketing Activities

(% of Stakeholders)

Top Box



■ 1 -Not Aware at All ■ 2 -Slightly Aware ■ 3 -Somewhat Aware ■ 4 - Aware ■ 5 - Very Aware

On a scale of 1-5, where 1 - Not at all aware and 5 - Very aware, how aware are you of the following 13 marketing activities that Tourism Golden has implemented over the past year? Scale: 1 = Not Aware At All, 5 = Very Aware, n=40-43.

Awareness of Tourism Golden Programs

Tourism Golden Marketing Programs	2025 Top Box	2024 Top Box	2023 Top Box
Annual publications (e.g. Golden Travel Planner, Hiking, Biking and Outdoor Discovery maps)	78%	84%	85%
Paid print advertising (e.g. Explore and Ski Canada)	63%	72%	60%
Coordination with regional, sector and provincial marketing activities (e.g. Golden Triangle, Kootenay Dirt)	61%	71%	65%
Media relations (e.g. hosting travel media and social influencers)	59%	70%	58%
Professional/Semi-professional events support (e.g. Freeride World Tour, Golden 24)	56%	69%	65%
Golden destination app (a GPS consumer app that assists trip planning)	54%	68%	64%
Tracking destination performance (e.g. visitor volume, occupancy rates, etc)	53%	58%	58%
Tracking visitor trends (e.g. profile, behaviour, demographics, trends, etc)	51%	55%	48%
Tracking marketing performance (e.g. click-through rates, campaign indicators)	50%	53%	49%
Paid digital, social and Google search advertising	50%	53%	47%
Content and asset creation (e.g. mtn biking, fishing and Locals Lowdown videos and user-generated content generation)	49%	50%	49%
Local community and industry events support (e.g. Golden Food Bank Harvest Dinner, Chamber's Business & Community Excellence Awards - Tourism Award, Golden Pride)	49%	50%	54%
Consumer show attendance (e.g. Calgary Outdoor Adventure Show)	37%	43%	39%

On a scale of 1-5, where 1 - Not at all aware and 5 - Very aware, how aware are you of the following 13 marketing activities that Tourism Golden has implemented over the past year? Scale: 1 = Not Aware At All, 5 = Very Aware, n=40-43 (2025), n=59-64 (2024), n=79-83 (2023).

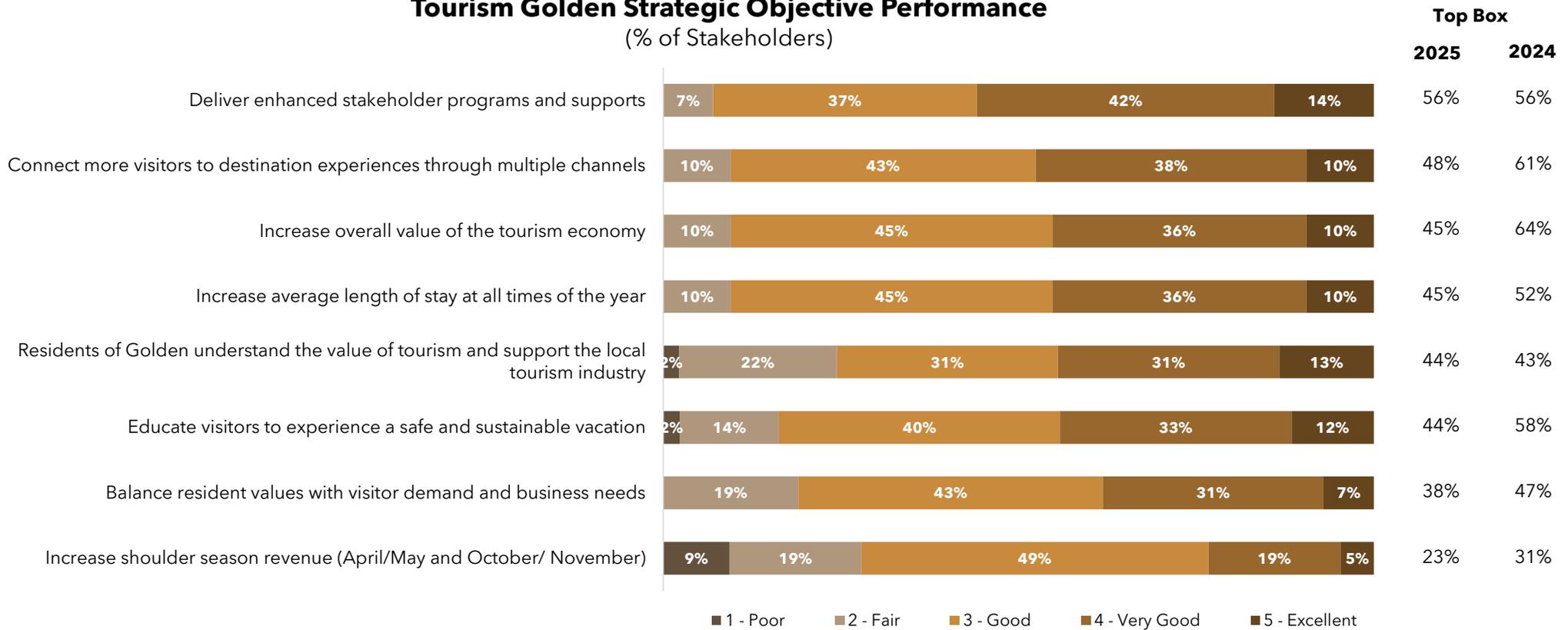
Tourism Golden Strategic Objective Performance

Stakeholders were asked to rate performance on the 8 key objectives identified in the 2022-2027 strategic plan and related to the four themes that directly impact the tourism industry including economic contribution; visitor experience; stakeholder experience; and resident/community experience (see next page for details).

- Less than half (45%) think that Tourism Golden has done a ‘very good’ or ‘excellent’ job at increasing overall value of the tourism economy in the past two years. This represents a notable 18 percentage points decrease compared to 2024 results.
- Most of the 8 objectives received positive ratings overall with high praise for delivering enhanced stakeholder programs and supports (56% rated performance as ‘very good’ or ‘excellent’), connecting more visitors to destination experiences through multiple channels (48% rated performance as ‘very good’ or ‘excellent’), increasing average length of stay at all times of the year (45% rated performance as ‘very good’ or ‘excellent’), educating visitors to experience a safe and suitable vacation (44% rated performance as ‘very good’ or ‘excellent’), and residents of Golden understanding the value of tourism and supporting the local tourism industry (44% rated performance as ‘very good’ or ‘excellent’), however this last objective saw 24% of stakeholders that rate its performance as ‘fair’ or ‘poor’).
- Similar to last year’s results, the largest area for improvement or focus is still increasing shoulder season occupancy and rates with only two-in-ten rating this area’s performance as ‘very good’ or ‘excellent’ (23%) and 9% rating performance as ‘poor’. After a notable increase in 2024 (+14 percentage points compared to 17% in 2023), in 2025 declined 8 percentage points compared to 2024 results).

Tourism Golden Strategic Objective Performance

Tourism Golden Strategic Objective Performance
(% of Stakeholders)



In Tourism Golden's 2022-2027 strategic plan, there are four themes that directly impact the tourism industry include: 1. Economic Contribution, 2. Visitor Experience, 3. Stakeholder Experience, and, 4. Resident/Community Experience. Based on these themes, 8 key objectives were identified. How would you rate Tourism Golden's performance on each of those objectives. n=42-45.

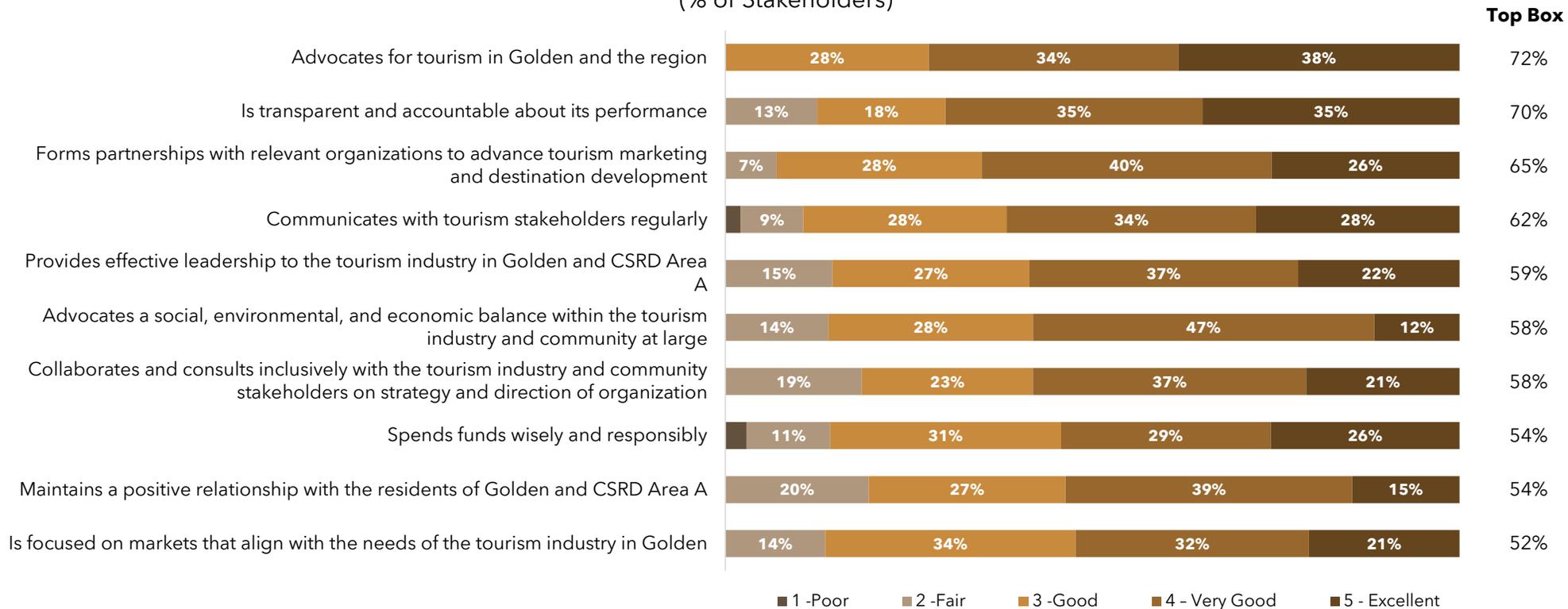
Tourism Golden Business Performance

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

- Overall, the majority of stakeholders rate Tourism Golden as 'very good' or 'excellent' on all presented business performance measures.
- The top two rated elements are that TG advocates for tourism in Golden and the region (72% rated as 'very good' or 'excellent') and that it is transparent and accountable about its performance (70% rated as 'very good' or 'excellent'). Most elements received approximately 60% 'very good' or 'excellent'.
- The bottom three rated performance elements were that TG is focused on markets that align with the needs of the tourism industry in Golden (52% rated as 'very good' or 'excellent'), maintains a positive relationship with the residents of Golden (54% rated as 'very good' or 'excellent'), and that TG spends funds wisely and responsibly (54% rated as 'very good' or 'excellent' with 3% rating as 'poor').
- Advocating for tourism in Golden continues to be the highest rated area in performance, similar to 2024, despite seeing only a 2 percentage point decrease compared to last year. It is noteworthy that TG's performance rating in being transparent and accountable about its performance saw a notable increase of 14 percentage points compared to 2024. In contrast, TG's focusing on markets that align with the needs of the tourism industry in Golden saw a 10 percentage points decrease compared to last year.

Tourism Golden Business Performance

Tourism Golden Strategic Business Performance (% of Stakeholders)



Tourism Golden Business Performance

Tourism Golden Business Performance
(% of Stakeholders)



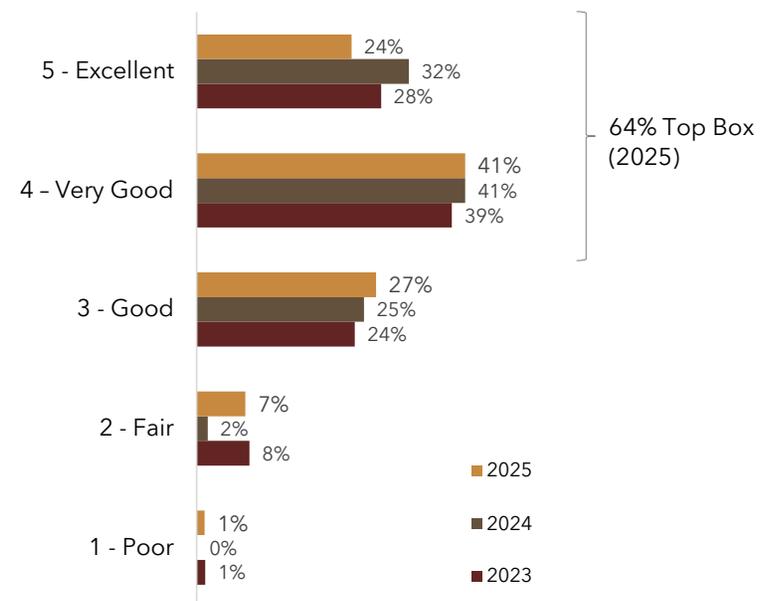
Tourism Golden strives to collaborate and be an inclusive, industry-driven organization. How do you rate Tourism Golden’s performance on the following ways of conducting business. n=35-47 (2025), n=43-61 (2024).

Tourism Golden Overall Business Performance

Stakeholders were asked to rate the overall performance of TG.

- In 2024, 64% of stakeholders rated TG's overall performance as 'very good' or 'excellent'. This is down 9 percentage points from 2024 (73%).
- It is noteworthy that in 2025, 1% rated Tourism Golden's overall performance as 'poor'; up from 0% in 2024, returning to 2023 ratings of 1%.

Tourism Golden Overall Performance
(% of Stakeholders)



Barriers to Growth

Barriers to Growth in Tourism Development

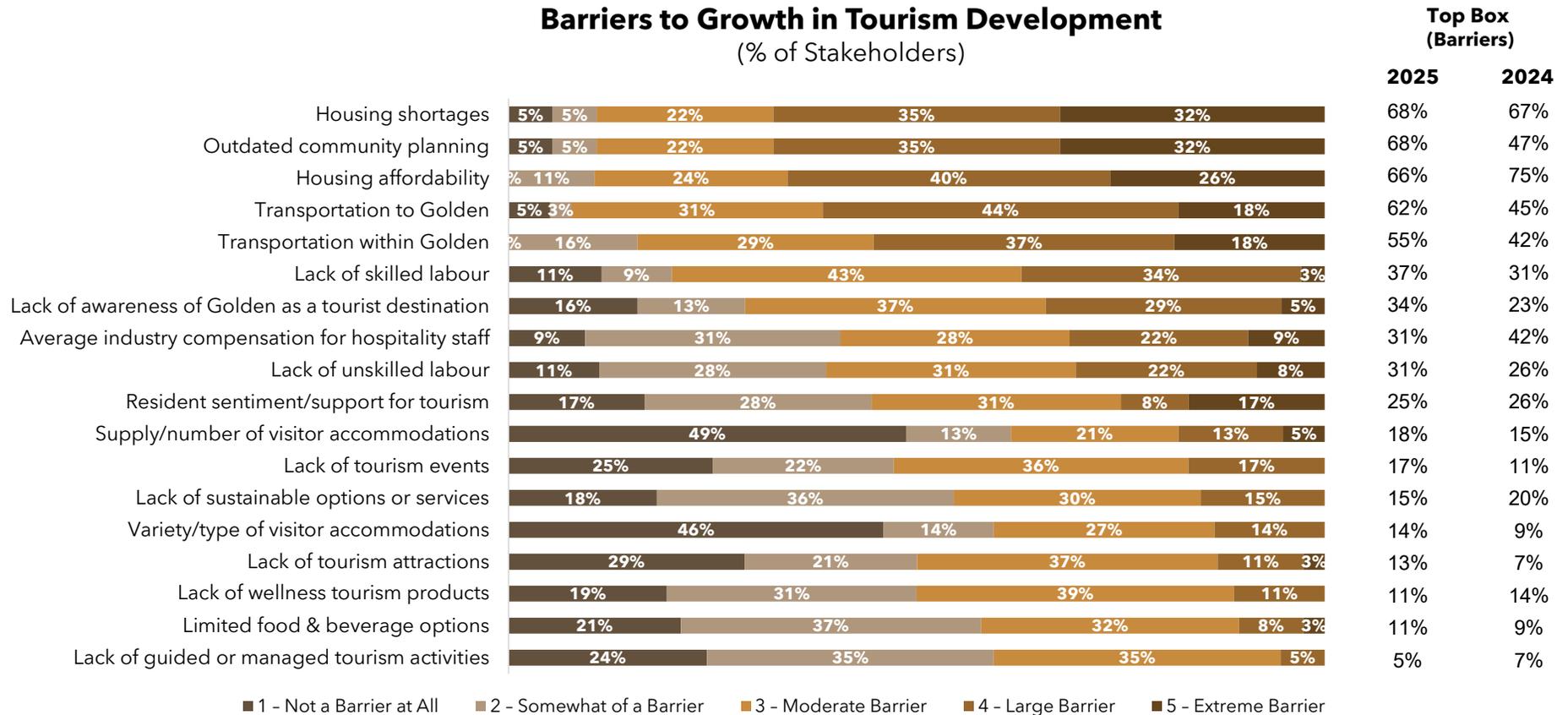
Stakeholders were asked to rate various elements on the magnitude as a barrier to the development and growth of tourism in Golden. They were also able to provide additional elements if they were so inclined.

- The largest barrier to tourism growth is housing shortages, with 68% rating it as a 'large' or 'extreme' barrier, while 66% said the same of housing affordability. That said, this last element saw a decrease compared to 2024 (down 9 percent points from 75% in 2024).
- In 2025, outdated community planning is the second top barrier to growth in tourism development with 68% rating it as a 'large' or 'extreme' barrier to growth. This represents a 21 percentage points increase from 47% in 2024.
- Transportation is also a challenge to tourism development. More than six-in-ten (62%) see transportation to Golden as a 'large' or 'extreme' barrier to growth while 55% gave the same ratings for transportation within Golden. Both elements saw increases in ratings as 'large' or 'extreme' barriers compared to last year (17 and 13 percentage points, respectively).

Although the Kicking Horse Canyon Phase IV project impacted Golden housing and transportation along Highway 1 for over three years until it wrapped up in July 2024. It appears that these issues remain post-Kicking Horse Canyon Phase IV project, however, it will be important to continue tracking these metrics ratings moving forward.

Barriers to Growth in Tourism Development

Barriers to Growth in Tourism Development
(% of Stakeholders)



■ 1 - Not a Barrier at All ■ 2 - Somewhat of a Barrier ■ 3 - Moderate Barrier ■ 4 - Large Barrier ■ 5 - Extreme Barrier

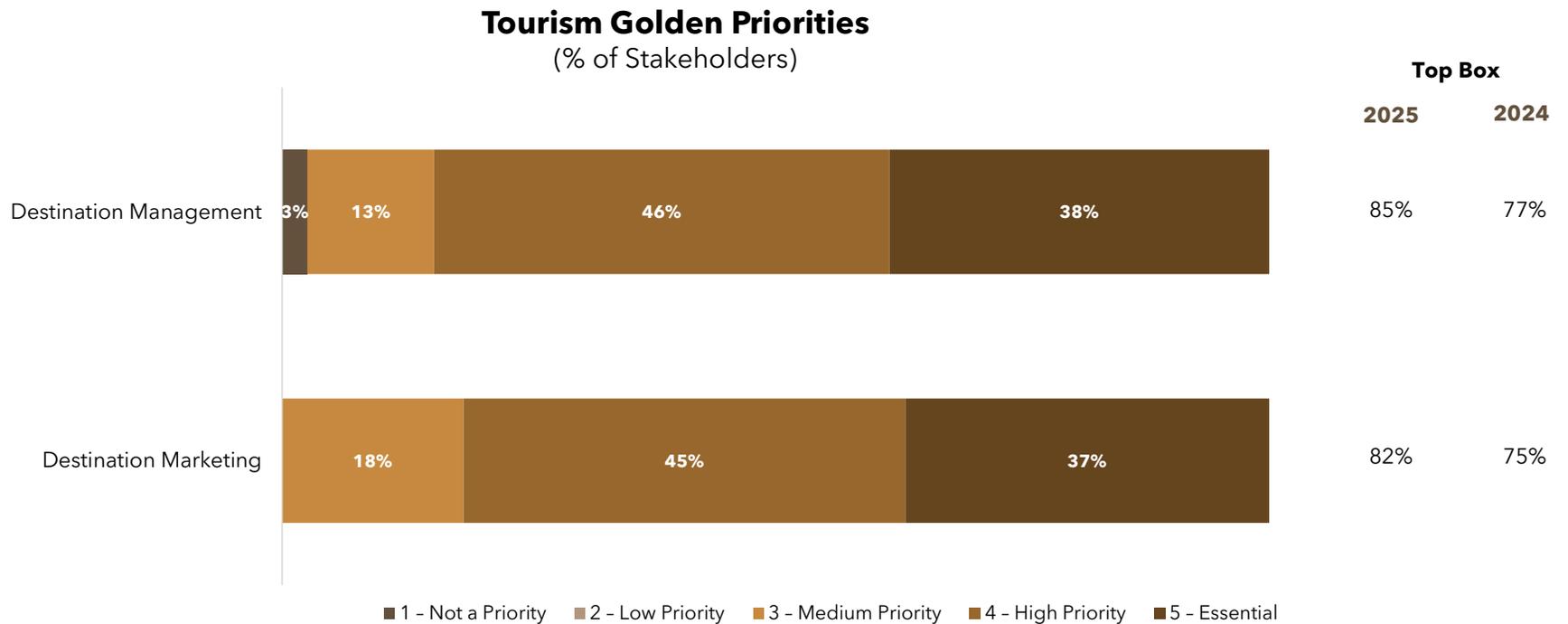
Priorities Moving Forward

Tourism Golden Priorities - High-level

Stakeholders were asked how much of a priority TG should place on two main pillars (see next page for details).

- Overall, both Destination Management and Destination Marketing are viewed as high priorities. In fact, both have more than eight-in-ten of stakeholders rating these as 'high priority' or 'essential' (85% and 82%, respectively).
- Ratings for these two priorities are higher in 2025 compared to the two previous year's results. Destination Management (85% vs 77% in 2024 and 80% in 2023) and Destination Marketing (82% vs 75% in 2024 and 80% in 2023).

Tourism Golden Priorities - High-level



Tourism Golden Priorities - Tactics

Stakeholders were asked about priorities for each strategic pillar tactic (see the next four pages for detail).

- The top five priorities overall are encouraging environmental sustainability of tourism in Golden (90%), build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met (90%), encouraging economic sustainability of tourism in Golden (89%), pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden) (87%), and support the sustainable and responsible growth of visitor volumes and tourism revenues (84%).
- The following tables provide the top priorities by category as well as the full ratings.

Level of Priority - Tactics

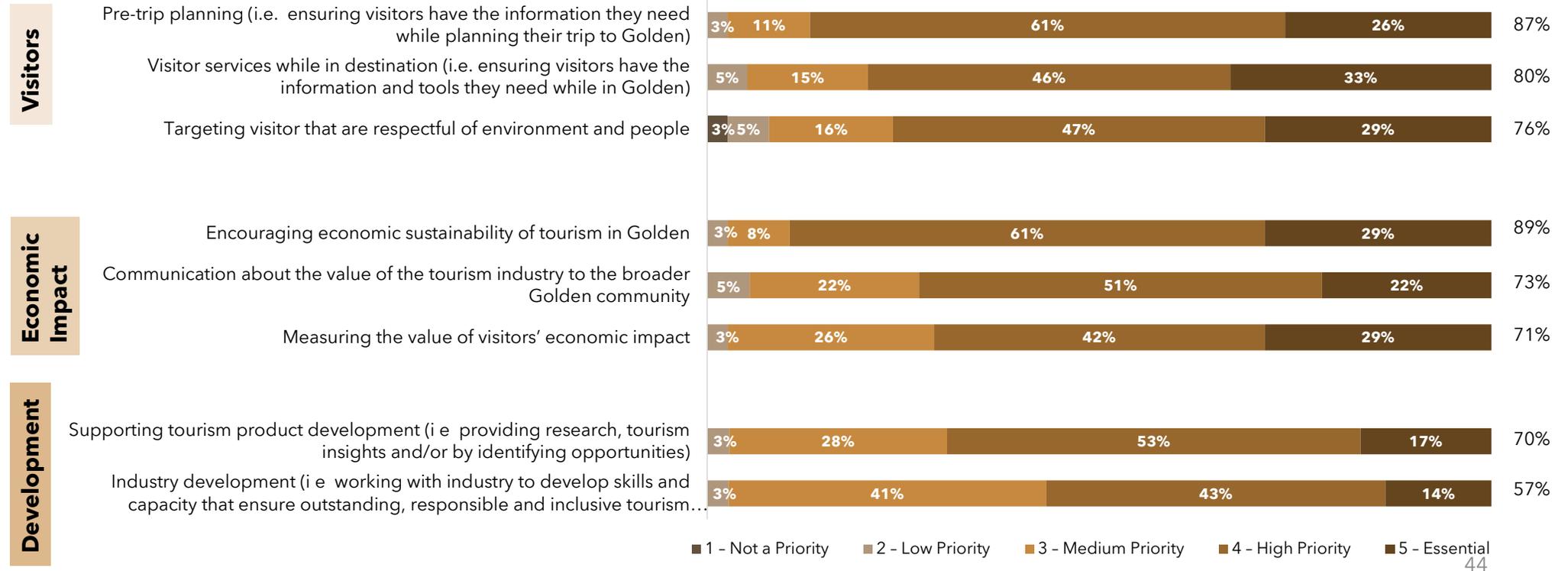
	Tactics	Top Box
Visitors	Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	87%
	Visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden)	80%
	Targeting visitor that are respectful of environment and people	76 %
Economic Impact	Encouraging economic sustainability of tourism in Golden	89%
	Communication about the value of the tourism industry to the broader Golden community	73%
	Measuring the value of visitors' economic impact	71%
Development	Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	70%
	Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding, responsible and inclusive tourism experiences)	57%
Development Sustainability	Encouraging environmental sustainability of tourism in Golden	90%
	Support the sustainable and responsible growth of visitor volumes and tourism revenues	84%
	Advocate for Golden to be a diverse and inclusive destination	70%
Community & Government Relations	Advocate for Golden to be a physically accessible destination	63%
	Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	90%
	Supporting community organizations on labour shortages and affordable housing issues	74%
	Build resident support for and engagement with tourism in Golden	69%
Research	Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)	70%

As noted, each of the strategic pillar is comprised of various tactics. Please share your opinion of what level of priority each of the following tactics should have? n = 37-39.

Level of Priority - Tactics

Tourism Golden Tactics Priorities (% of Stakeholders)

Top Box



44

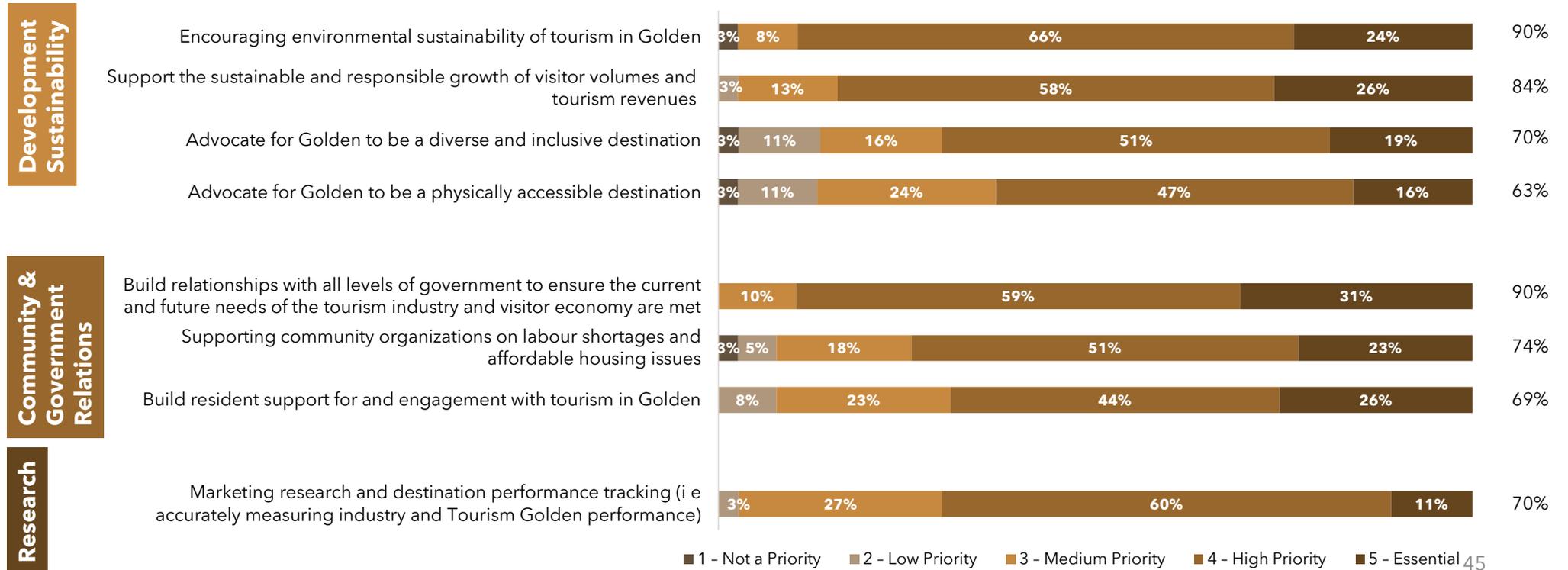
As noted, each of the strategic pillar is comprised of various tactics. Please share your opinion of what level of priority each of the following tactics should have? n = 36-39.

Level of Priority - Tactics

Tourism Golden Tactics Priorities

(% of Stakeholders)

Top Box



■ 1 - Not a Priority ■ 2 - Low Priority ■ 3 - Medium Priority ■ 4 - High Priority ■ 5 - Essential 45

As noted, each of the strategic pillar is comprised of various tactics. Please share your opinion of what level of priority each of the following tactics should have? n = 37-39.

Level of Priority - Tactics

	Tactics	Top Box (2025)	2024	2023
Visitors	Pre-trip planning (i.e. ensuring visitors have the information they need while planning their trip to Golden)	87%	62%	73%
	Visitor services while in destination (i.e. ensuring visitors have the information and tools they need while in Golden)	80%	75%	74%
	Targeting visitor that are respectful of environment and people	76%	84%	74%
Economic Impact	Encouraging economic sustainability of tourism in Golden	89%	84%	81%
	Communication about the value of the tourism industry to the broader Golden community	73%	67%	63%
	Measuring the value of visitors' economic impact	71%	63%	76%
Development	Supporting tourism product development (i.e. providing research, tourism insights and/or by identifying opportunities)	70%	59%	65%
	Industry development (i.e. working with industry to develop skills and capacity that ensure outstanding, responsible and inclusive tourism experiences)	57%	63%	70%
Development Sustainability	Encouraging environmental sustainability of tourism in Golden	90%	78%	73%
	Support the sustainable and responsible growth of visitor volumes and tourism revenues	84%	84%	84%
	Advocate for Golden to be a diverse and inclusive destination	70%	64%	63%
	Advocate for Golden to be a physically accessible destination	63%	59%	63%
Community & Government Relations	Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	90%	78%	80%
	Supporting community organizations on labour shortages and affordable housing issues	74%	72%	73%
	Build resident support for and engagement with tourism in Golden	69%	69%	67%
Research	Marketing research and destination performance tracking (i.e. accurately measuring industry and Tourism Golden performance)	70%	67%	65%

Municipal and Regional District Tax (MRDT) Funds

Stakeholders were asked about their support using MRDT funds for affordable housing.

- The question was modified in 2023 to better qualify types of affordable housing initiatives. Last year we saw stakeholders' perceptions shift to overwhelmingly support affordable housing initiatives that benefit the tourism industry; however, this has somewhat softened in 2025. Specifically, 71% agree that MRDT funds be used for 'housing infrastructure initiatives that benefit the tourism industry' and 68% agree with 'affordable housing supply initiatives that directly benefit the tourism industry'. Approximately four-in-ten (41%) of stakeholders agree with using MRDT funds for 'affordable or workforce housing initiatives that have no direct benefit to the tourism industry', however, almost half (46%) of stakeholders disagree with this statement.

Agreement with Using MRDT Funds for Affordable Housing

(% of Stakeholders)

Top Box
2025 2024

Affordable housing infrastructure initiatives that directly benefits the tourism industry



71% 84%

Housing supply initiatives that benefit the tourism industry (e.g. workforce housing developments)



68% 84%

Affordable or workforce housing initiatives that have no direct benefit to the tourism industry



41% 48%

■ 1 - Strongly Disagree ■ 2 - Somewhat Disagree ■ 3 - Neither Agree or Disagree ■ 4 - Somewhat Agree ■ 5 - Strongly Agree

47

How much do you agree with the following statement about the use of Golden's MRDT funds for affordable housing? n=38-39

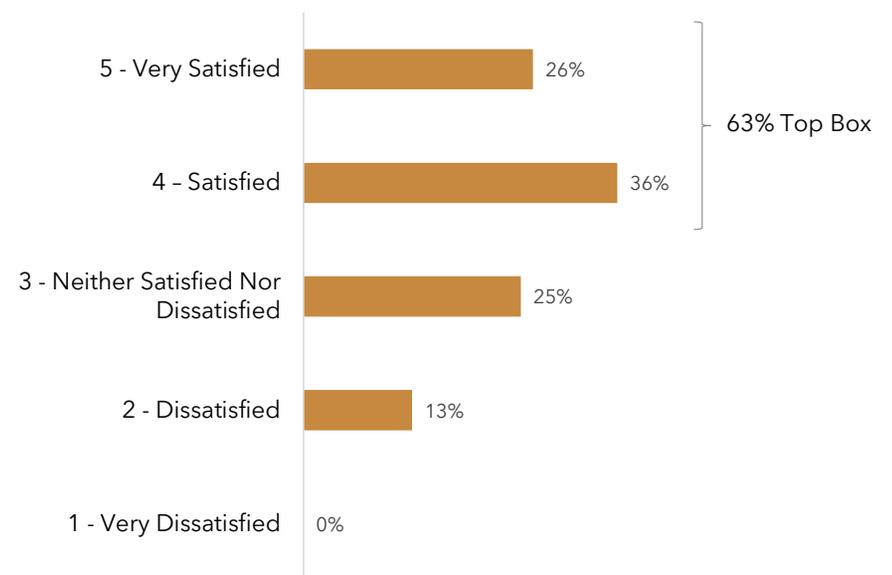
Tourism Golden Use of MRDT Funding

Stakeholders were asked about their satisfaction with Tourism Golden's use of MRDT funds.

- Two-thirds (63%) of stakeholders are satisfied or very satisfied with Tourism Golden's use of MRDT funds.
- It is noteworthy that 0% were very dissatisfied with Tourism Golden's use of MRDT funds; however, 13% did note some dissatisfaction.

Tourism Golden's Use of MRDT Funds

(% of Stakeholders)



Sustainability Initiatives

Stakeholders were asked to select their top five priorities of 13 sustainability initiatives (see next page for details).

- More than half of stakeholders prioritized enhancing visitor information and education on responsible and respectful behaviour and attracting and retaining tourism labour (62% and 56%, respectively).
- Other top five responses were increasing shoulder season visitation (51%), targeting ‘responsible tourists’ in marketing initiatives (36%), encouraging new tourism product development that is environmentally sustainable (36%), gathering data to inform the tracking and management of visitor volume, value and behaviour (33%), and affordable housing initiatives (33%). These top five responses shifted compared to 2024. The main priority last year was increasing shoulder season visitation (third priority in 2025), attracting and retaining tourism labour remained the second priority in 2025, while enhancing visitor information and education on responsible and respectful behaviour and attracting and retaining tourism labour was the third priority in 2024 and is the main priority in 2025.
- Stakeholders mentioned five other sustainability initiatives they would like to see implemented in Golden.

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=39. 39 stakeholders provided 171 responses. The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

Are there other sustainable tourism initiatives not listed above that you would like to see implemented in Golden? Stakeholders mentioned 5 other sustainable tourism initiatives.

Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 9)	Stakeholder Rating	Lower Rated Sustainability Initiatives (Bottom 4)	Stakeholder Rating
1. Enhancing visitor information and education on responsible and respectful behaviour (e.g., a visitor code of conduct when visiting local parks, trails, campgrounds, and other outdoor recreation and community spaces)	62%	10. Enhancing visitor awareness of safe and responsible backcountry recreation	26%
2. Attracting and retaining tourism labour	56%	11. Understanding and tracking Golden resident sentiment towards tourism	21%
3. Increasing shoulder season visitation	51%	12. Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)	21%
4. Targeting 'responsible tourists' in marketing initiatives	36%	13. Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)	8%
5. Encouraging new tourism product development that is environmentally sustainable	36%		
6. Gathering data to inform the tracking and management of visitor volume, value and behaviour	33%		
7. Affordable housing initiatives	33%		
8. Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction	28%		
9. Increasing visitor yield (i.e. expenditures per visitor)	28%		

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=39. 39 stakeholders provided 171 responses. The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

Sustainability Initiatives

Top Rated Sustainability Initiatives (Top 9)	2025 Rating	2024 Rating
1. Enhancing visitor information and education on responsible and respectful behaviour (e.g., a visitor code of conduct when visiting local parks, trails, campgrounds, and other outdoor recreation and community spaces)	62%	51%
2. Attracting and retaining tourism labour	56%	54%
3. Increasing shoulder season visitation	51%	63%
4. Targeting 'responsible tourists' in marketing initiatives	36%	35%
5. Encouraging new tourism product development that is environmentally sustainable	36%	26%
6. Gathering data to inform the tracking and management of visitor volume, value and behaviour	33%	25%
7. Affordable housing initiatives	33%	51%
8. Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction	28%	30%
9. Increasing visitor yield (i.e. expenditures per visitor)	28%	37%

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=39. 39 stakeholders provided 171 responses. n=74. 74 stakeholders provided 340 responses (2024). The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

Sustainability Initiatives

Lower Rated Sustainability Initiatives (Bottom 4)	2025 Rating	2024 Rating
10. Enhancing visitor awareness of safe and responsible backcountry recreation	26%	39%
11. Understanding and tracking Golden resident sentiment towards tourism	21%	18%
12. Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)	21%	14%
13. Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)	8%	18%

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future? n=39. 39 stakeholders provided 171 responses. n=74. 74 stakeholders provided 340 responses (2024). The percent totals more than 100% because stakeholders rated up to five sustainability initiatives.

APPENDIX - Questionnaire



Tourism Golden's 2025 Stakeholder Survey

△ – Truncated Version for Government

□ – Truncated Version for Local Organizations and Secondary Local Businesses

○ – Truncated Version for Non-Local Organizations

Section 1 – Tourism in Golden

First, we have a few questions about tourism and your business/Organization.

How important is the Tourism industry to the following:

- a. Your Business/Organization
- △□ b. Golden's Economy
- △□○ c. British Columbia's Economy

ANSWER OPTIONS:

1. Not Important at All
2. Not Very Important
3. Neither Important nor Unimportant
4. Important
5. Very Important
6. Don't Know/Not Sure

Please rate your level of agreement with the following statements:

- a. As a business, I/we believe the current amount of tourism development in Golden is adequate.
- b. As a business, I/we support responsible tourism growth.
- c. As a business, our staff have enough knowledge to provide tourist with information on attractions, events and other tourist opportunities happening in the area.

ANSWER OPTIONS:

1. Strongly Disagree
2. Somewhat Disagree
3. Neither Disagree nor Agree
4. Somewhat Agree
5. Strongly Agree
6. Don't Know/Not Sure

- △□ **Do you believe that the current level of tourism development in Golden is too much, too little or just right?**

Too Much
Just Right
Too Little
Don't Know

- △□ **Do you believe the speed of tourism development in Golden is too fast, too slow or just right?**

Too Fast
Just Right
Too Slow
Don't Know

- △□ **Would you like visitor volume in Golden to increase, decrease or stay the same in the next five years?**

Increase
Stay the Same
Decrease
Don't Know

destination experiences through multiple channels						
Educate visitors to experience a safe and sustainable vacation	G	G	G	G	G	G
Deliver enhanced stakeholder programs and supports	G	G	G	G	G	G
Residents of Golden understand the value of tourism and support the local tourism industry	G	G	G	G	G	G
Balance resident values with visitor demand and business needs	G	G	G	G	G	G

A Tourism Golden strives to collaborate and be an inclusive, industry-driven organization. How do you rate Tourism Golden's performance on the following ways of conducting business?

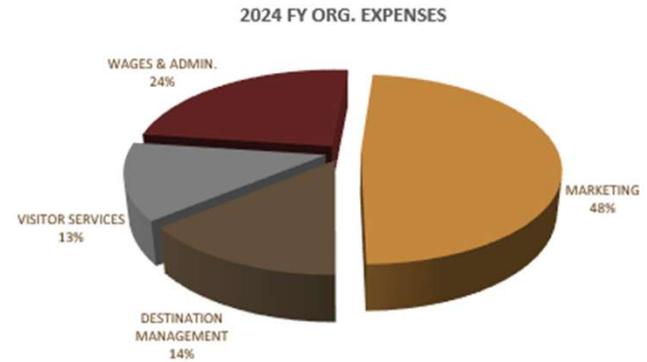
Please rate each on a scale where 1 = Poor and 5 = Excellent.*

	1 - Poor	2 - Fair	3 - Good	4 - Very Good	5 - Excellent	Don't Know
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Communicates with tourism stakeholders regularly	G	G	G	G	G	G
Advocates for tourism in Golden and the region	G	G	G	G	G	G
Forms partnerships with relevant organizations to advance tourism marketing and destination development	G	G	G	G	G	G
Is transparent and accountable about its performance	G	G	G	G	G	G
Spends funds wisely and responsibly	G	G	G	G	G	G
Collaborates and consults inclusively with the tourism industry and community stakeholders on strategy and direction of organization	G	G	G	G	G	G
Is focused on markets that aligns with the needs of the tourism industry in Golden	G	G	G	G	G	G

Maintains a positive relationship with the residents of Golden and CSRD Area A	<input type="radio"/>					
Provides effective leadership to the tourism industry in Golden and CSRD Area A	<input type="radio"/>					
Advocates a social, environmental, and economic balance within the tourism industry and community at large	<input type="radio"/>					

Tourism Golden is funded primarily by MRDT revenues. The breakdown of Tourism Golden's annual spending is shown below with more detailed information available in the 2024 Annual Report which can be found [here](#).



How satisfied, if at all, are you with Tourism Golden's use of MRDT funds?

Please rate on a scale of 1 = Very Dissatisfied and 5 = Very Satisfied

	1 - Very Dissatisfied	2 - Dissatisfied	3 - Neither Satisfied <u>Nor</u> Dissatisfied	4 - Satisfied	5 - Very Satisfied	Don't Know
Tourism Golden's Use of MRDT Funds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ASK IF '1 - Very Dissatisfied' or '2 - Dissatisfied': What about Tourism Golden's use of MRDT funds, specifically, are you dissatisfied with?

Please fill in your response.

inclusive tourism experiences)						
Development - Sustainability						
Support the sustainable and responsible growth of visitor volumes and tourism revenues.	G	G	G	G	G	G
Encouraging environmental sustainability of tourism in Golden	G	G	G	G	G	G
Advocate for Golden to be a physically accessible destination	G	G	G	G	G	G
Advocate for Golden to be a diverse and inclusive destination	G	G	G	G	G	G
Community & Government Relations						
Build relationships with all levels of government to ensure the current and future needs of the tourism industry and visitor economy are met	G	G	G	G	G	G
Build resident support for and engagement with tourism in Golden	G	G	G	G	G	G
Supporting community organizations on labour shortages and affordable housing issues	G	G	G	G	G	G

Research						
Marketing research and destination performance tracking (i.e. accurately measuring industry and tourism Golden performance)	G	G	G	G	G	G

How much do you agree with the following statement about the use of Golden's MRDT funds for affordable housing?
Please rate each of the following program areas on a 1-5 scale, where 1 = Strongly Disagree and 5 = Strongly Agree. *

I support the use of Golden MRDT revenues for...	1 - Strongly Disagree	2 - Somewhat Disagree	3 - Neither Agree or Disagree	4 - Somewhat Agree	5 - Strongly Agree	Don't Know
Affordable or workforce housing initiatives that have no direct benefit to the tourism industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable housing infrastructure initiatives that directly benefits the tourism industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing supply initiatives that benefit the tourism industry (e.g. workforce housing developments)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please check up to five of the following sustainability initiatives that you think are priorities in the foreseeable future?*

- Understanding and tracking Golden resident sentiment towards tourism

- Enhancing visitor information and education on responsible and respectful behaviour (e.g., a visitor code of conduct when visiting local parks, trails, campgrounds, and other outdoor recreation and community spaces)
- Enhancing visitor awareness of safe and responsible backcountry recreation
- Targeting 'responsible tourists' in marketing initiatives
- Gathering data to inform the tracking and management of visitor volume, value and behaviour.
- Working with Golden tourism businesses to implement or enhance sustainability practices such as waste management, and carbon emissions reduction
- Encouraging new tourism product development that is environmentally sustainable
- Encouraging Inclusive Tourism Experiences (everyone can participate in tourism experiences, including and especially those in vulnerable groups)
- Enhancing Accessible Tourism Experiences (people of all abilities have the opportunity to fully participate in tourism experiences)
- Increasing shoulder season visitation
- Increasing visitor yield (i.e. expenditures per visitor)
- Attracting and retaining tourism labour
- Affordable housing initiatives
- None

Are there other sustainable tourism initiatives not listed above that you would like to see implemented in Golden?

If so, please fill in your response.

Section 6 - Other Comments

That completes the survey; however, we would be happy to hear any other comments that you would like to share with Tourism Golden.

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



Thank You for taking the time out of your busy schedule. Your feedback is very important and Tourism Golden appreciates your sharing.



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