



Summer 2023 Golden Mountain Biking Economic Impact – Final Report

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EXECUTIVE SUMMARY

In the spring of 2023, the Golden Cycling Club (GCC) identified the need to conduct a comprehensive, representative research study of mountain bikers in Golden to better understand the economic impact, identify perceptions, and gauge impressions of the trail network.

Align Consulting Group was engaged to conduct the Mountain Biking Economic Impact project for the Summer of 2023. The study design was a two-phase approach with an initial intercept survey being conducted by Golden Cycling Club staff using tablets with an online follow up being sent to those who agreed. In addition, the follow up survey was also sent to all Golden Cycling Club members. The GCC surveying was conducted between June 20 and September 17, 2023, researchers conducted 645 full intercept interviews. At the end of the season, the follow-up survey was conducted and garnered 410 full completes (95 recruited from Phase 1 and 315 from the GCC supplement list).

Key Findings

- It is estimated that Golden hosted 7,326 unique mountain bikers in the summer of 2023. Nearly one-quarter are residents (23%), 16% were day visitors, and 61% were overnight visitors.
- Alberta is the single largest source market (45%), in particular Calgary (17%), followed by Golden Residents (23%) and British Columbia (19%). Not surprisingly, the market origin varies by Day and Overnight Visitors with overnight more likely to be from further away.

Mountain Biking Characteristics

- Riding parties most commonly consist of two people (42%). The average riding party size is 2.5 people.
- Most (88%) of riders drive a vehicle to go mountain biking and park in the lot. An additional 7% drive and shuttle. This demonstrates that parking

lots are an important element of the mountain biking experience and should be considered when expanding the trail network in the area.

- On average a ride day consists of 4.2 trails and the majority (75%) use an app to track their ride.
- Resident riders averaged 45 ride days in 2023 with 31% of their time spent on CBT Mainline trails.
- Awareness of the Adaptive Trails in Golden is moderate with 48% being aware. This is notably higher among Resident riders (93%). This suggests that more education could be done to inform Visitors of this unique Mountain Biking offering and uniquely position the destination.
- Mountain Biker support of the Golden Cycling Club varies dramatically by resident versus visitors. In fact, only 15% of Mountain Bikers overall are members of GCC; however, 59% of resident riders are members. Donations to GCC follow a similar pattern. Overall, approximately 39% or four-in-ten riders donate to GCC. This is much higher at nearly three-quarters (72%) of resident riders donating to GCC. This demonstrates that capturing more membership and donations from visiting riders could make a large impact on GCC's revenue budget.
- Nearly half (47%) of mountain bikers expressed some interest in regionally-made mountain bike parts/bikes/gear yet only 7% have heard of the Kootenay Outdoor Recreation Enterprise Initiative (KORE) which is a non-profit supporting the 'craft gear from here'. This demonstrates that there may be an untapped market that KORE has yet to penetrate therefore efforts should focus on building awareness among both Golden resident riders as well as visiting riders.
- Golden Mountain Bikers tend to be relatively young with 65% being between the ages of 25 and 44 years old. Mountain Bike Day Visitors tend to be younger with nearly half (48%) being 25-34 years old.

- Mountain bikers are well educated and affluent. In fact, nearly two-thirds (64%) have a university degree and 42% have an annual household income of at least \$150,000.

Mountain Biking Visitors

- The most important factors for Mountain Bike Visitors when choosing a destination are quality of the mountain biking (90%) and the variety of the mountain biking (83%). Familiarity (51%), proximity (50%) and the Bike Park at KHMR (39%) round out the top five most important factors for Mountain Biking Visitors when choosing Golden.
- Overnight Mountain Biking Visitors stayed an average of 2.6 nights in Golden and Camping/RV Park was the most common accommodation type (46%) followed by staying with friends or family (21%). In terms of location of paid-accommodations, Downtown Golden (27%), South of Downtown Golden (21%) and KHMR (17%) were the most common areas Overnight Mountain Bikers stayed.
- Nearly half (46%) of Mountain Bike Visitors planned to mountain bike in Golden more than once in the 2023 season. Day Visitors, not surprisingly, were more likely to be planning multiple trips (61% versus 41% for Overnight Visitors). On average Day Visitors averaged 2.5 Day Trips for mountain biking in the 2023 season and Overnight Visitors average 1.8 Overnight trips to Golden for Mountain Biking in the same time period.
- Overall, Mountain Bike Visitors are Very Satisfied Overall with their trip in Golden (89%) with an additional 9% rating their satisfaction as somewhat satisfied. In terms of experience, Recreation and Adventure was extremely highly rated with 96% of Mountain Bike Visitors rating this element as a '4' or '5' on a scale of 1 to 5 where 1 is 'Poor' and 5 is 'Excellent'. The one element presented that appears to be lagging is the attractiveness along Hwy 1 between the East and West entrances to Golden (46%).

Experience Evaluation

- Overall mountain biking experience on the Golden trail network was extremely high with 97% rating it as '4' or '5 - Very Satisfied'.

- Trail Quality (96%), Maintenance (91%), Variety (91%), and Quality of Adaptive Trails (91%) were all very highly rated elements by users. The areas that appear could use some improvement, albeit still relatively highly rated, are picnic/shelter options (58%), washroom facilities (62%) and the number of adaptive trails (67%). This suggests that the GCC has done an outstanding job at creating and maintaining an exceptional Mountain Biking Experience in the Golden area.
- The Bike Park at KHMR has more mixed reviews with overall satisfaction at 75% which is strong; however, it varies drastically between Residents (44%) and Visitors (83%). Residents are a lot less satisfied about most aspects of the Bike Park than Visitors. This suggests that KHMR has an opportunity to improve the experience but also the locals' perception. A key component is service recovery as Residents have more lasting experiences and speak to each other. The impact of one bad day can be catastrophic to the general perception. As such, a more targeted engagement with residents may prove to be beneficial. It is apparent that the substantially higher Visitor ratings than the Residents' may be impacted by historical or other factors.
- From a word of mouth perspective, we use the concept of Net Promoter Scores. For Golden overall as a travel destination, Mountain Bike Visitors have a NPS of 45.7. For Golden as a Mountain Bike Destination it is notably higher, in fact, all Mountain Bikers have an NPS of 65.1. Mirroring the satisfaction scored, the NPS for the Bike Park at KHMR is substantially lower at only 22.3. This is pulled down by Resident Mountain Bike riders which have a score of only 5.9.

Economic Impact

- The economic impact of Mountain Biking in Golden is strong with consumer spending totaling \$8.9 million and GDP coming in at \$3.6 million for the Province. Mountain Biking in Golden created approximately 46 jobs in the Province overall.

Highlights	Results
Estimated Number of Unique Riders in 2023	7,362
Market Origin	
Golden Residents	23%
BC	19%
Alberta	45%
Mountain Biker Profile	
Avg Size of Ride Party	2.5 people
% Arrive by Vehicle and Park in Lot	88%
Avg # Trails Ridden/Day	4.2 trails
% Track Ride with an App	75%
Adaptive Trail Awareness	48%
% Members of GCC / % Donate to GCC	15% / 39%
% Interested in Regionally Made Equipment/Gear	47%
% Awareness of KORE	7%
Age: 25-34 Years Old	31%
Age: 35-44 Years Old	34%
Age: 45-54 Years Old	20%
Income: HH Income of \$150,000 or More	42%
Mountain Bike Visitors	
Origin - Calgary	32%
Origin – Other Alberta	27%
Origin – BC	25%
Average Travel Party Size	2.4 People
% with Children in Travel Party	17%
Avg Trips in Season – Day Trips	2.5 Day Trips
Avg Trips in Season – Overnight Trips	1.8 Overnight Trips
Average Days Mountain Biking in Golden – Overnight Mt Bike Visitors	2.3 Bike Days
Factors in Choosing Destination - % Important: Quality of Mt Biking	90%
Factors in Choosing Destination - % Important: Variety of Mt Biking	83%
Overall Satisfied with Experience in Golden ¹	98%

Satisfaction with Local Services	
Bike Repairs & Maintenance	88%
Gear Sales	80%
Bike Sales	69%
Lessons	42%
Guides/Tours	25%
Overall Satisfaction/Experience Evaluation	
Trail Network Overall Satisfaction	97%
KHMR Bike Park Overall Satisfaction	75%
High Likelihood to Return to Golden for Mountain Biking ¹ (Visitors)	80%
High Likelihood of Recommending Golden as a Mountain Biking Destination ¹	70%
High Likelihood of Recommending Golden as a Travel Destination ¹ (Visitors)	63%
NPS – Golden General Destination (Visitors)	45.7
Economic Impact²	
Consumer Spend	\$8.9 million
Jobs	46 jobs
GDP	\$3.6 million

1. Top box % - the proportion of visitors that rated as a '4' or '5' on a 5-point scale or a '9' or '10' on an 11-point scale (0-10).

2. Total direct, indirect and induced in BC in total.

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Front Cover Photo Credit: Mountain Biker near Golden, retrieved from: <https://goldencyclingclub.com/>

Location: Golden

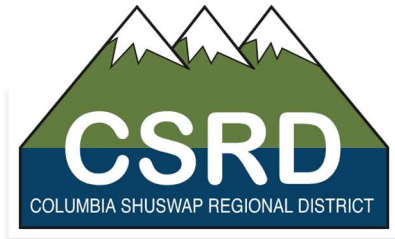
Photographer: Brian Coles

1. INTRODUCTION

1.1. Acknowledgements

The Golden Cycling Club would like to extend our sincere thanks to the First Nations on whose traditional territories we use for mountain biking and interviewing for this survey. Golden is the traditional unceded territory of the Ktunaxa and Secwepemc peoples and is also the chosen home to the Métis Nation Columbia River Society.

The Golden Cycling Club was able to undertake this project due to the generous partnerships and contributions from Tourism Golden, the Economic Trust of the Southern Interior, Columbia Shuswap Regional District and the Town of Golden. Without their financial support, this important study would not have been viable. Golden Cycling Club would like to formally acknowledge these generous contributions and thank our partners for their support.



In addition to Align Consulting Group, we would also like to recognize Pacific Analytics as our economic impact consultant.



1.2. Background

The Golden Cycling Club was created in 2002 and is dedicated to building and maintaining world-class trails throughout the Golden area. Currently, the GCC maintains four distinct trail networks: Moonrakers, CBT Mainline Network, Mountain Shadows, and Mount 7. As a mountain biking destination, these four trail networks are complemented with the Kicking Horse Mountain Resort's bike park.

In the spring of 2023, GCC identified the need to conduct a comprehensive economic impact study of Golden mountain bikers to quantify the importance of mountain biking in the community. In addition to developing an economic impact assessment, the main purpose of the Mountain Bike Economic Impact Study is to: gain a more complete understanding of riders' perceptions of and experience mountain biking in Golden. Based on this the objectives include:

- ✓ Gain a complete understanding of mountain bikers on Golden trails including residents, day and overnight visitor (i.e. characteristics, biking habits and demographics);
- ✓ Develop a comprehensive understanding of Mountain Bike Visitors (i.e. market origin, trip type and characteristics, including length of stay, paid accommodation use),
- ✓ Assess the experiences of Mountain Bikers in Golden (i.e. satisfaction with mountain bike trails, Net Promoter Score); and,
- ✓ Identify service or product gaps.

Align Consulting Group (ACG) was retained for this project. ACG provided guidance on study design, survey development, interviewer training, onsite data collection sampling plan, onsite data collection software, administration of online follow up surveys, analysis and reporting. The Golden Cycling Club hired and retained staff to conduct the onsite intercept surveys using tablets provided by GCC and Tourism Golden. The study design is described in the next section.

It should be noted that interviews also took place at the Golden 24 event; however, given that it is a specialized event, it was determined that results would not be included in this main report. Therefore results are available under a separate cover.

2. METHODOLOGY

2.1. Data Collection

In the Summer of 2023, two methods were implemented to collect information from Golden Mountain Bikers. The methods are summarized below. In terms of the questionnaires, they were designed by Align Consulting Group and GCC and are available in Appendix C.

Method 1 (On-Site and Online Follow Up Surveys)

employed a two-stage, multi-location, in-person, on-site survey with an online follow up survey. GCC hired staff to intercept mountain bikers on select days, times and locations. The sample plan was developed by Align Consulting and provided distribution of effort between four primary data collection locations with splits for time of day, day of week and month. They conducted in person interviews between June 20 and September 17, 2023. The on-site interview was 2-7 minutes long depending on if they were a Resident or Visitor and finished with a request to participate in an additional online follow-up survey via email. In total, 645 interviews were conducted in this Phase.

Method 2 (GCC Member List added to Online Follow Up Survey)

was essentially a boost of Resident sample and was included in the follow-up survey process noted in Method 1. This allowed us to collect additional information from those residents who may not have been intercepted in Phase 1 of Method 1. Given that

most of the data for Residents was collected at this point (as it was designed as an end of season assessment for this group) adding this list was consistent with Method 1 and provided more data to analyze. In total, 410 surveys were completed in this Phase – 95 of which were from Phase 1 and 315 were from the GCC Membership List.

2023 Golden Mountain Biker Methodology Summary

Method 1

A. On-Site Intercept Survey (645 completes)

- In-person, on-site surveys.
- Representative, probability sampling
- Screening questions
- Profile questions and demographics
- **Resident Bikers:**
 - ride details
 - estimated seasonal riding
- **Visiting Bikers:**
 - market origin
 - travel party
 - trip characteristics
 - spend
- Phase 2: follow-up questionnaire recruitment
- Use tablets as primary collection method

Method 1 & Method 2

B. Follow Up Survey (410 completes)

- Online follow-up survey
- **Resident Bikers:** Respondents recruited through Phase 1 if not a GCC member. If GCC member, will email all emailable members. Contacted at end of season so can ask season questions.
- **Visiting Bikers: Respondents recruited in Phase 1**
- Satisfaction with trails, services, roads, products, etc.
- Identify gaps and opportunities to improve biking experience
- Other study objective questions
- More detailed spend questions
- More detailed demographic questions

2.2. Project Overview - Approach

2.2.1. Data Collection

In addition to the data collection noted in the previous section, data was obtained from KHMR as well as from Trail Forks in order to inform the estimates.

2.2.2. Data Analysis

Data from KHMR (unique rider estimates), Trail Forks (Unique rider estimates), and the surveys (type – resident/day visitor/overnight visitor, trail vs KHMR rider – including overlap) were used to estimate volume of unique mountain bikers in Golden's 2023 season.

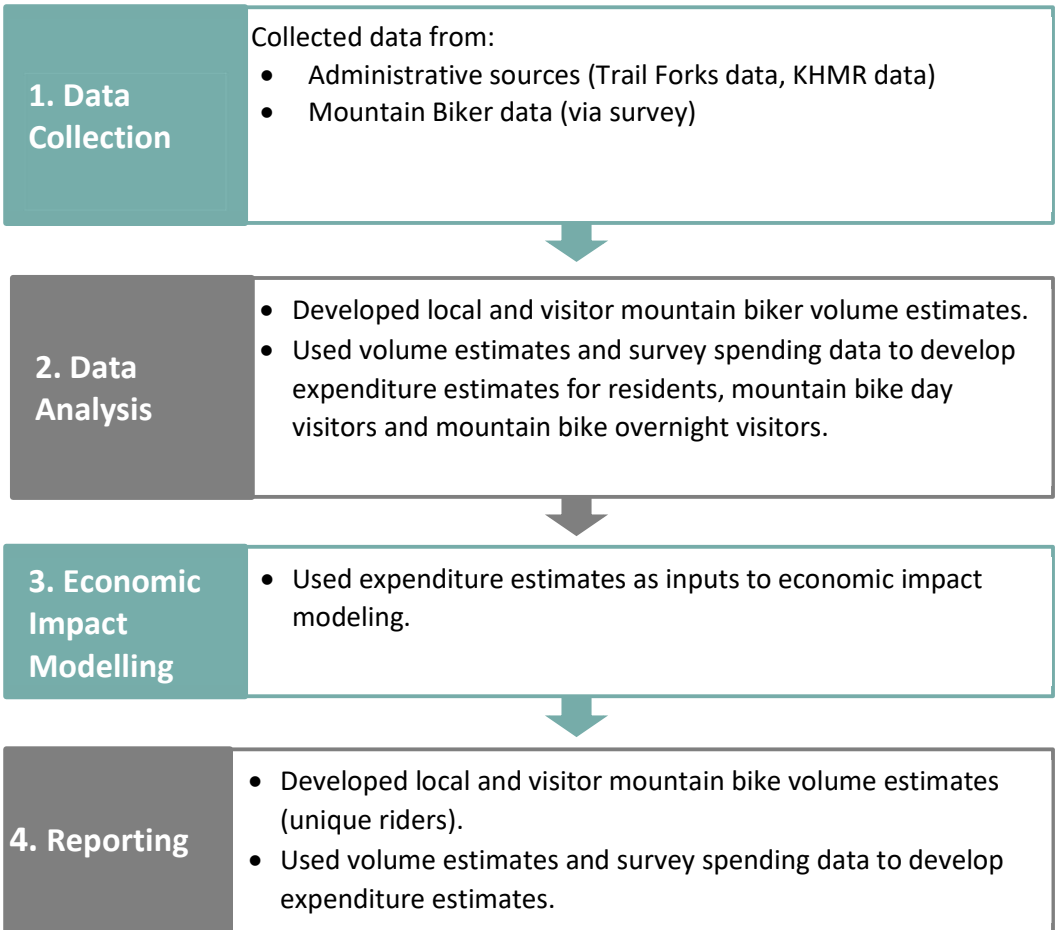
2.2.3. Economic Impact Modeling

Incremental Mountain Bike spending estimates were used as inputs into the Tourism Regional Input-Output Model. The Tourism Regional Input-Output Model (TRIOM) is an economic impact model developed by Pacific Analytics that uses Statistics Canada's detailed Input-Output tables for BC.¹ Outputs to the TRIOM include estimates of direct, indirect and induced economic impacts on the Columbia Shuswap Regional District (CSRD) and in other areas of British Columbia.

Definitions of those impacts include:

1. **Direct Impacts:** measures the contribution of a business or industry to the economy in terms of Gross Domestic Product (GDP), labour income paid, employment, and taxes paid to various governments.

Approach



¹ The full Regional I/O model was developed for the Ministry of Transportation for their own internal project analysis; the tourism version was commissioned by Destination BC to focus on tourism-related projects and analysis.

2. **Indirect Impacts:** measures the impacts resulting from the expenses (goods and services) of a firm or industry used in the production process. The purchase of goods or services increases the economic activity of the supplying firms and, in turn, the supplying firms themselves must purchase their own goods and services which generates further economic activity in those supplying firms.
3. **Induced Impacts:** measures the impacts resulting from the wages and salaries paid by a firm or industry. When the wages and salaries are spent (less taxes and savings), the economic activity of the firms supplying those consumer goods and services increases. As well, the supplying firms themselves will pay additional wages and salaries to their own employees which, when spent, generates more economic activity. A comprehensive explanation of direct, indirect and induced impacts and how precisely they are calculated can be found in Appendix B.

2.3. Data Analysis

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

- Data from all methods were combined and are summarized in the following pages.
- Occasionally, top box analysis was used where the top two responses were summarized to understand meaningful differences between groups (e.g. bikers that responded with '4s' or '5s' on a 5-point satisfaction scale).
- The survey collected expenditures for each travel party (and not per visitor), but travel party size was divided into total travel party expenditures to equal per person expenditures.
- To avoid the influence of outliers in expenditures, travel party, length of stay, bike days calculations, the top and bottom 2.5% of responses were trimmed.
- Open-ended (textual) responses are available in the Appendix.
- Sample size warnings were provided as footnotes when response categories had less than 30 responses. Results have been suppressed for low sample/base sizes.
- The subtitle on each graph indicates the relevant sample population.

Data collected at the Golden 24 event is not included in this analysis and is available under a different cover.

2.3.1. Weighting

All results in this report are weighted. Two weights were developed based on the response survey (intercept or follow up) and correct for Mountain Biker type: Resident, Day Visitor, Overnight Visitor. The weighting scheme is used to combine results to a total that is reflective of the distribution of unique bikers in each group.

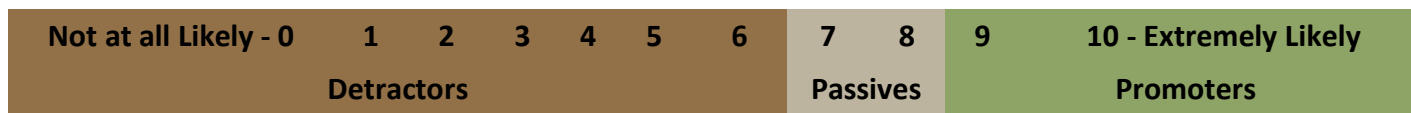
2.3.2. Net Promoter Score

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

The Net Promoter Score® (NPS®)² measures the intention to recommend a travel destination and is also an indicator of overall satisfaction with the travel experience.

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

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



$$\begin{array}{|c|} \hline \% \\ \hline \text{Promoters} \\ \hline \end{array} - \begin{array}{|c|} \hline \% \\ \hline \text{Detractors} \\ \hline \end{array} = \text{NPS}$$

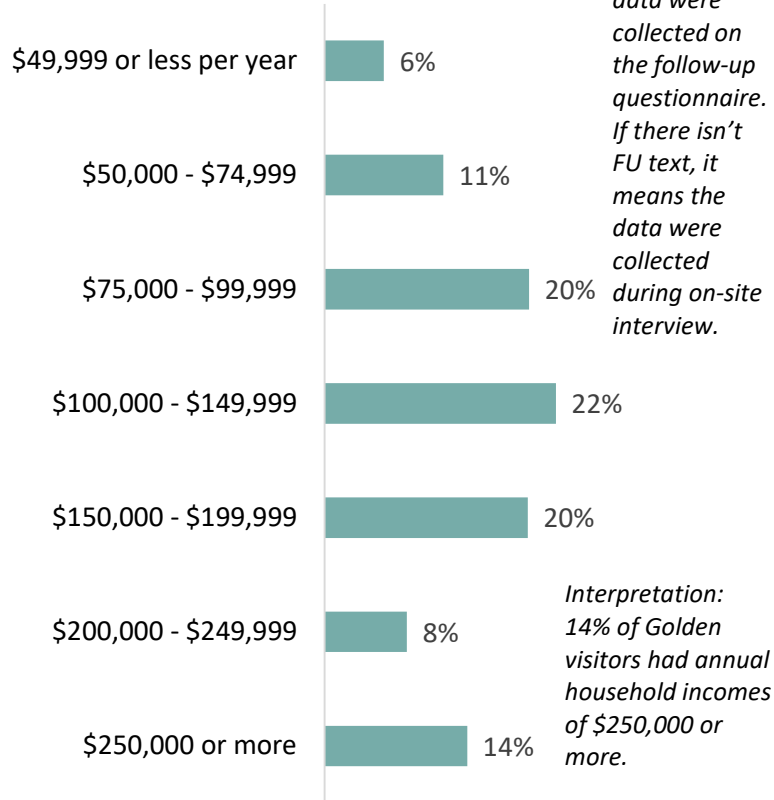
² Net Promoter, NPS and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

2.4. Tips for Reading Results

Annual Household Income (\$CDN)

Percentage of Mt Bikers ^{FU}

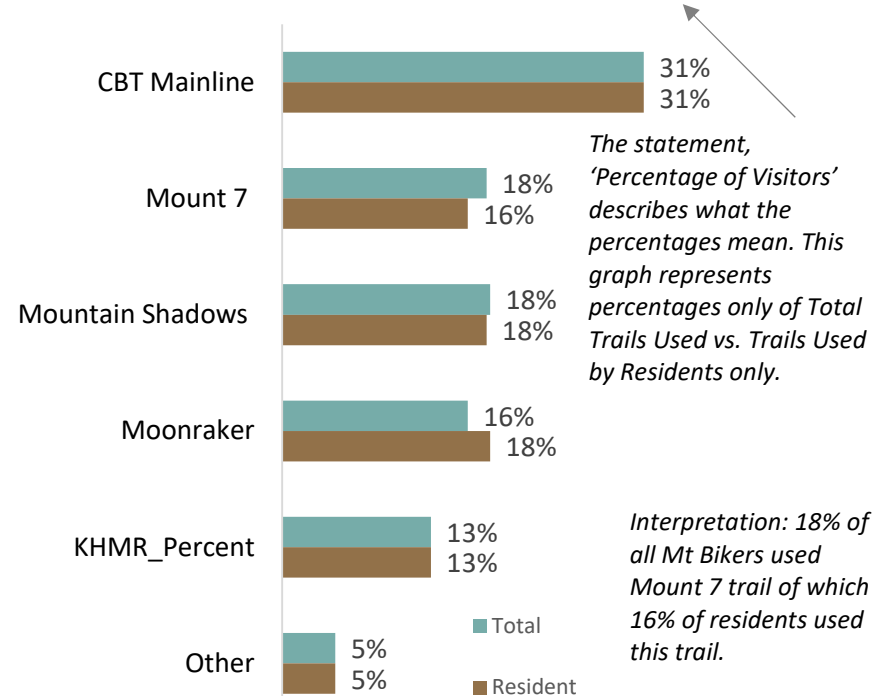
FU – Means data were collected on the follow-up questionnaire. If there isn't FU text, it means the data were collected during on-site interview.



Trails Used

Percentage of Mt Bikers

'Trails Used' describes what the content of the graph.



Footnotes about questions are noted here. Often they describe the 'other' categories, describe an analysis note, or describe the number of responses (n) if low.

1. Visitors could respond with more than one response therefore the percentages add up to more than 100%.

3. RESULTS

3.1. Golden Mountain Biker Profile

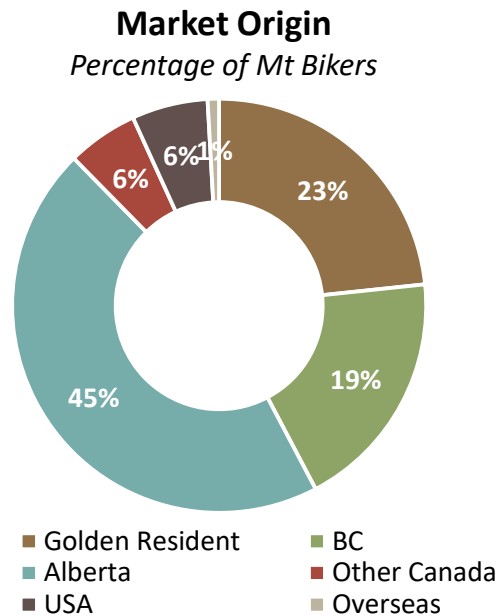
3.1.1. Mountain Biker Volume Estimates

The research survey results were combined with external data sources including the number of unique riders on the trail network in 2023 from Trail Forks and an estimate of ridership from KHMR. Based on this, we were able to estimate the number of unique riders in Golden during the 2023 season. In total, there were just under 7,400 riders of which 23% were residents, 16% were day visitors and 61% were overnight visitors. The breakdown is shown in the table below.

Type	Number of Unique Riders in 2023	% of Unique Riders in 2023
Residents	1,710	23%
Day Visitors	1,150	16%
Overnight Visitors	4,502	61%
<i>Overnight Visitors: Trail & Bike Park</i>	<i>1,694</i>	<i>23%</i>
<i>Overnight Visitors: Bike Park Only</i>	<i>1,780</i>	<i>24%</i>
<i>Overnight Visitors: Trail Only</i>	<i>1,028</i>	<i>14%</i>
TOTAL ESTIMATE	7,362	100%

3.1.2. Mountain Biker Origin

Approximately one-quarter of mountain bikers in Golden are residents (23%). Alberta is the largest source market accounting for 45% of mountain bikers followed by BC (other than Golden) with 19% of bikers.



Market Origin	Residents	Day Visitors	Overnight Visitors	Total
Golden Resident	100%	--	--	23%
BC	--	39%	21%	19%
Alberta	--	59%	59%	45%
Other Canada	--	2%	9%	6%
USA	--	0%	10%	6%
Overseas	--	0%	2%	1%

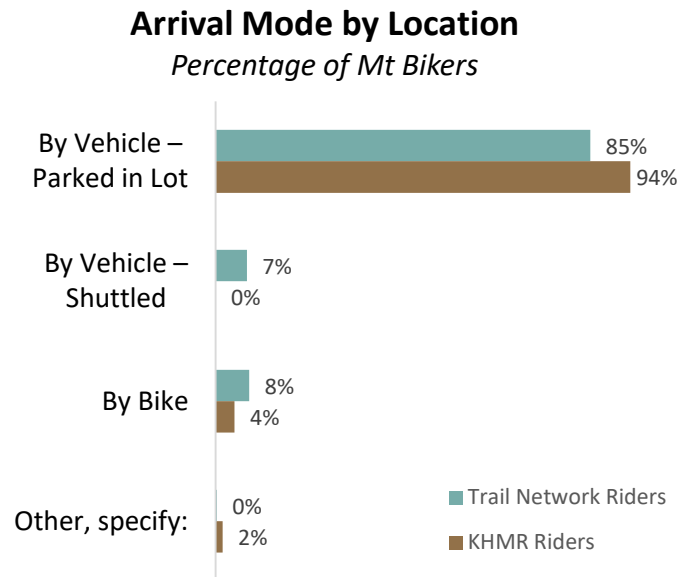
Q. Where do you live?

Base: All intercept respondents, n=645.

3.1.3. Ride Characteristics

Arrival Mode to Trail

The majority of bikers arrive at the trail/hill by vehicle and park in the parking lot. However, 7% of trail network users do report shuttling using a vehicle and 8% arrive on their bike. Not surprisingly, riders at the bike park are even more likely to arrive by vehicle and park in the lot with only 4% arriving by bike. Understandably, Residents are more likely to bike to the trailhead than other biker types.



Arrival Mode	Residents	Day Visitors	Overnight Visitors	Total
By Vehicle – Parked in Lot	76%	95%	90%	88%
By Vehicle – Shuttled	5%	5%	5%	5%
By Bike	18%	0%	4%	7%
Other	1%	0%	1%	1%

Q. How did you get to the trails/hill today?

Base: All intercept respondents, n=645.

Riding Party Size

The average riding party consists of 2.5 riders. Overnight Visitors tend to have the largest average rider party size at an average of 2.7 compared to 2.3 for Day Visitors and only 2.2 for Residents.



Average Riding Party Size:
2.5 people

	Residents	Day Visitors	Overnight Visitors	Total
Average Riding Party Size	2.2	2.3	2.7	2.5

Q. Including yourself, how many people are in your riding party today?

Base: All intercept respondents, n=645.

Number of Trails Ridden

On average, bikers ride 4.2 trails per ride. Day Visitors, not surprisingly given they are trying to make the most of their limited time, plan on riding the most trails on their ride at 4.9 compared to only 3.9 trails for Residents.



Average Number of Trails Planned to Ride:
4.2 trails

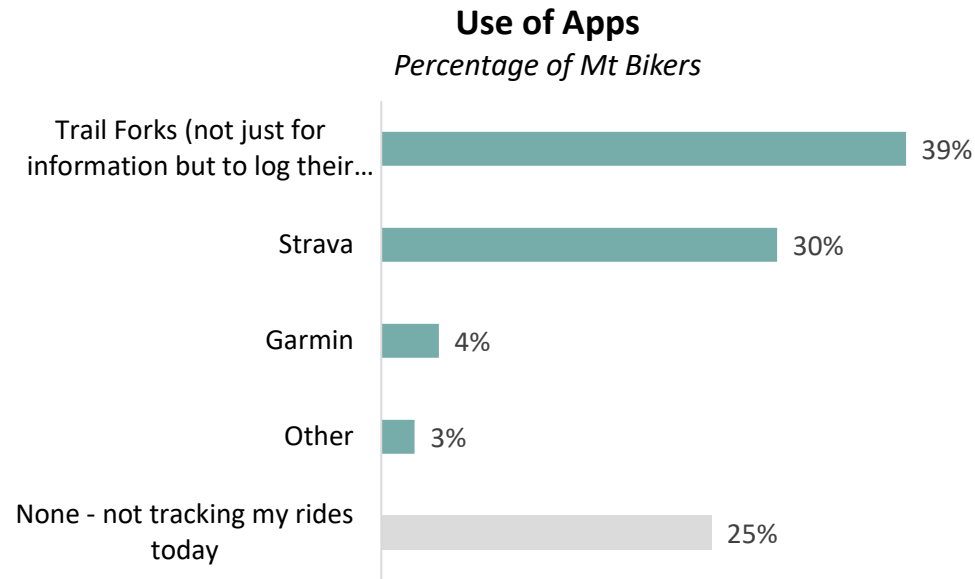
	Residents	Day Visitors	Overnight Visitors	Total
Average Number of Trails Planned to Ride	3.9	4.9	4.2	4.2

Q. How many trails do you plan to ride today?

Base: All intercept respondents, n=645.

Use of Mt Biking Apps

Three-in-four bikers use at least one app when riding. In fact, 39% use Trail Forks and 30% use Strava. That said, 25% do not track their ride. Residents are notably less likely to track their ride with 31% saying they do not track their ride compared to 22% of Day Visitors and 23% of Overnight Visitors. Given the familiarity, this is not surprising as the apps are used for both fitness tracking but also for navigation.



Use of Apps (multiple response)	Residents	Day Visitors	Overnight Visitors	Total
Trail Forks (not just for information but to log their ride)	27%	36%	45%	39%
Strava	31%	36%	27%	30%
Garmin	8%	7%	2%	4%
Other	3%	0%	3%	3%
None - not tracking my rides today	31%	22%	23%	25%

Q. Which of the following apps or services, if any, are you using to track your rides today?

Base: All intercept respondents, n=645.

3.1.4. Trail and Bike Park Usage

Residents Trail Usage in 2023 Season

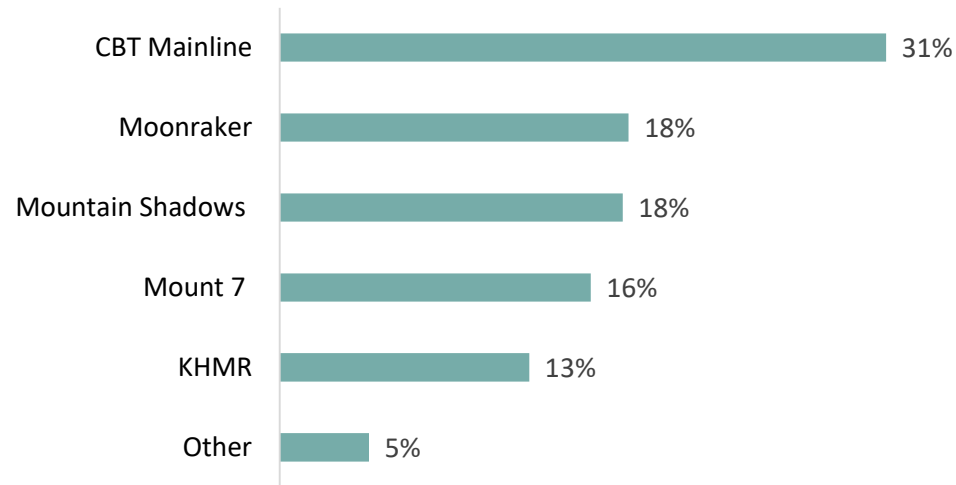
Overall, residents average 45 biking days during the 2023 season. Of those days, the most popular trail network was the CBT Mainline trails with 31% of their ride days spent there (or approximately 14 ride days). Mount 7 and Mountain Shadows account for approximately 18% of ride days each followed by Moonraker (16%) and the bike park at KHMR (13%).



Average Residents' Biking Days in 2023:
45 days

% of Trail Days on Each Network

Percentage of Residents' Ride Days in 2023 Season



Q. In total, what is your best estimate as to how many days you personally rode the Mountain Bike trails in the Golden area over the 2023 season?

Q. How many of those [___] days (or partial days) did spend at each of the following Golden Mountain Biking sites/locations?

Base: Residents in follow up survey, n=280.

Overnight Visitors Trail Usage

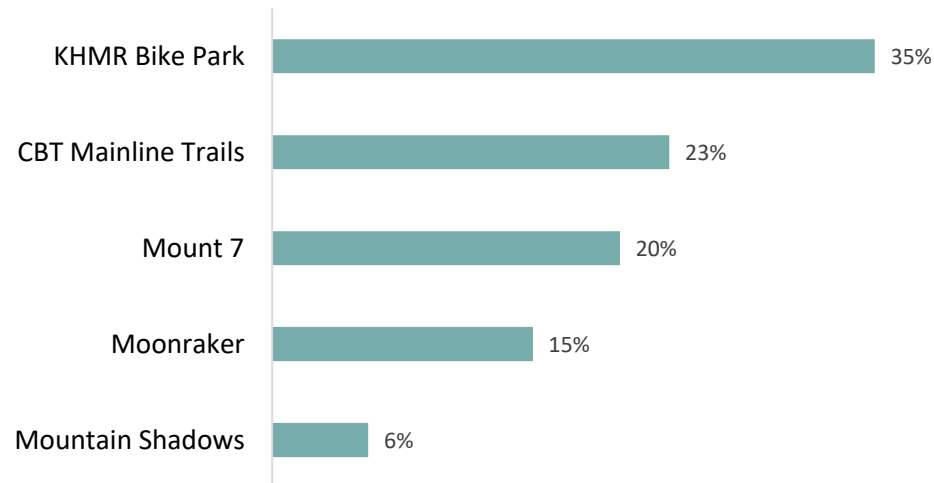
Overnight visitors are biking for an average of 2.3 days in Golden. Of those days, the majority of the time, on average, is spent at KHMR Bike Park (35%). CBT Mainline trail network is next most popular (23%) followed closely by Mount 7 trails (20%). Mountain Shadows does not appear to be very popular among overnight visitors.



Average Number of Biking Days for Overnight Visitors:
2.3 days

% of Trail Days on Each Network

Percentage of Overnight Visitors' Ride Days per Trip



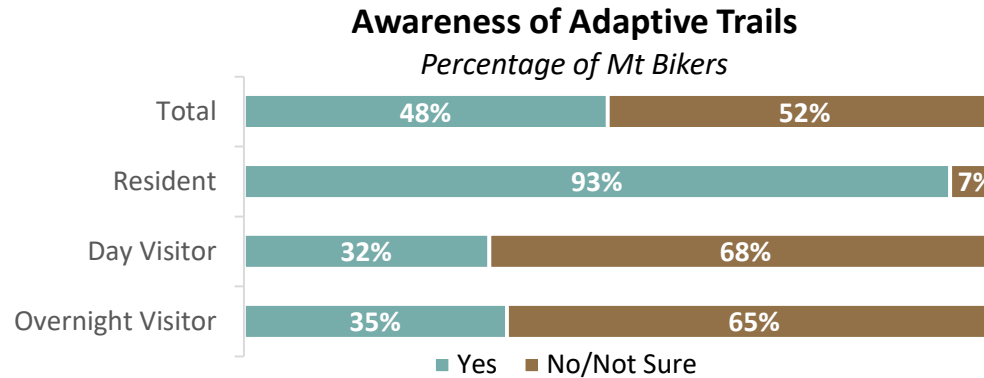
Q. On this trip, how many days do you plan to mountain bike in Golden?

Q. Of those, how many trail days (or partial days) do you plan to spend at the following Golden locations?

Base: Overnight visitors in intercept, n=259.

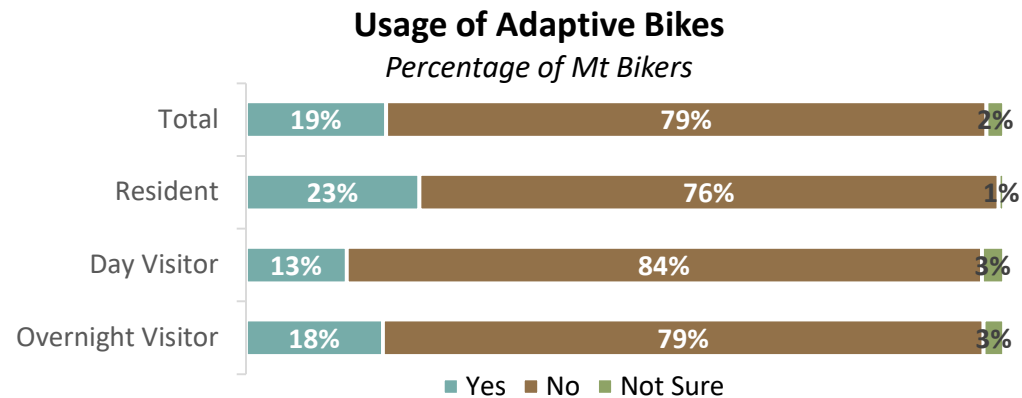
Adaptive Trail Awareness and Usage

Approximately half of Golden Mountain Bikers are aware of the Adaptive trails in the CBT Trail network. As we would expect, awareness is notably higher among residents with 93% being aware compared to only 32% of Day Visitors and 35% of Overnights Visitors. This shows that there may be an opportunity to better market the Adaptive Trails in source markets as a means of positioning Golden as a complete mountain biking destination.



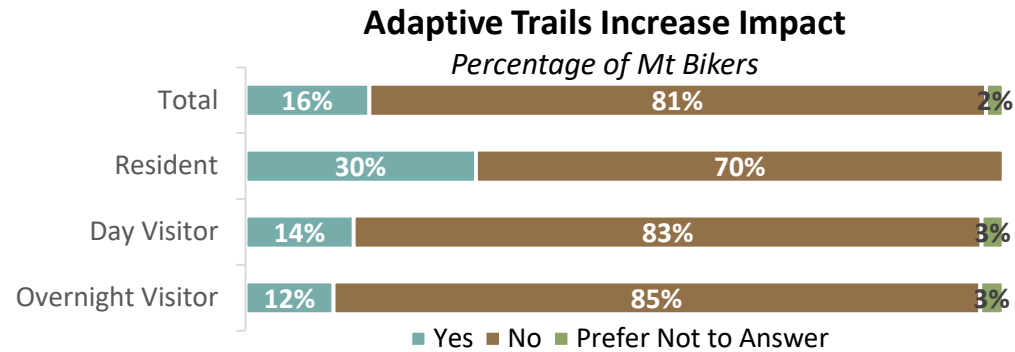
Q. Are you aware that Golden has adaptive trails in the CBT Trail network? Base: All intercept respondents, n=645.

Approximately one-in-five bikers (19%) report that they, or someone they know, rides an adaptive bike.



Q. Do you, or anyone you know, ride an adaptive bike? Base: All intercept respondents, n=645.

In total, 16% of mountain bikers say that they would ride Golden’s trail network more often if there were more adaptive trails. In fact, 30% of residents claim that expanding the adaptive trail network would increase how often they ride. The impact of more adaptive trails is smaller but still notable for Day Visitors (14%) and Overnight Visitors (12%).

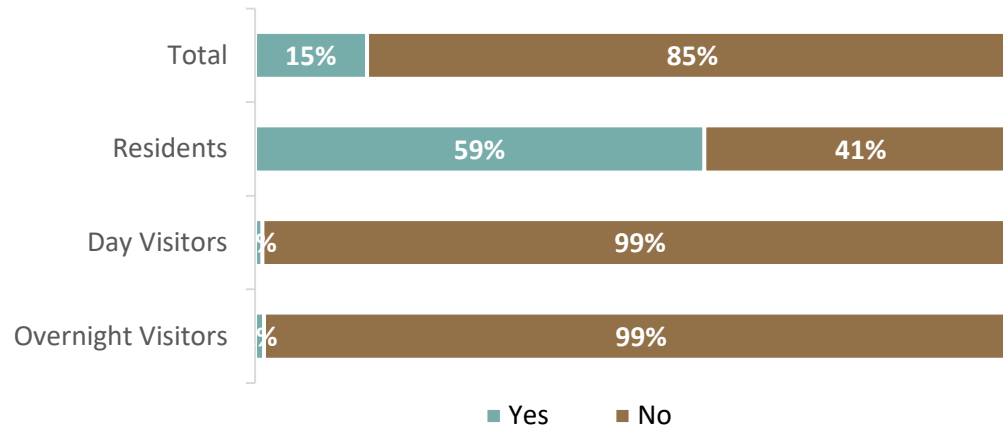


Q. Would having more adaptive trails, increase how often you ride Golden’s trail network? Base: All intercept respondents, n=645.

3.1.5. Golden Cycling Club Membership

Overall, 15% of 2023 riders were members of the Golden Cycling Club. This was negligible for Day and Overnight Visitors but approximately 6-in-10 (59%) of Residents report being members. Overall, 39% mountain bikers donated/planned to donate to the GCC. This is notably higher among residents (72%) suggesting that there may be an opportunity to target visiting mountain bikers to encourage more donations from these riders.

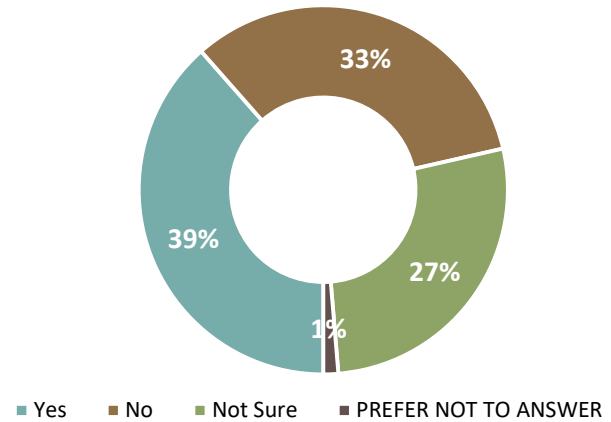
GCC Membership
Percentage of Mt Bikers



Q. Are you currently a Golden Cycling Club member?

Base: All intercept respondents, n=645.

Golden Cycling Club Donations
Percentage of Mt Bikers



Q. Have you, or do you plan to, donate to the Golden Cycling Club this trip or season?

Base: All intercept respondents, n=645.

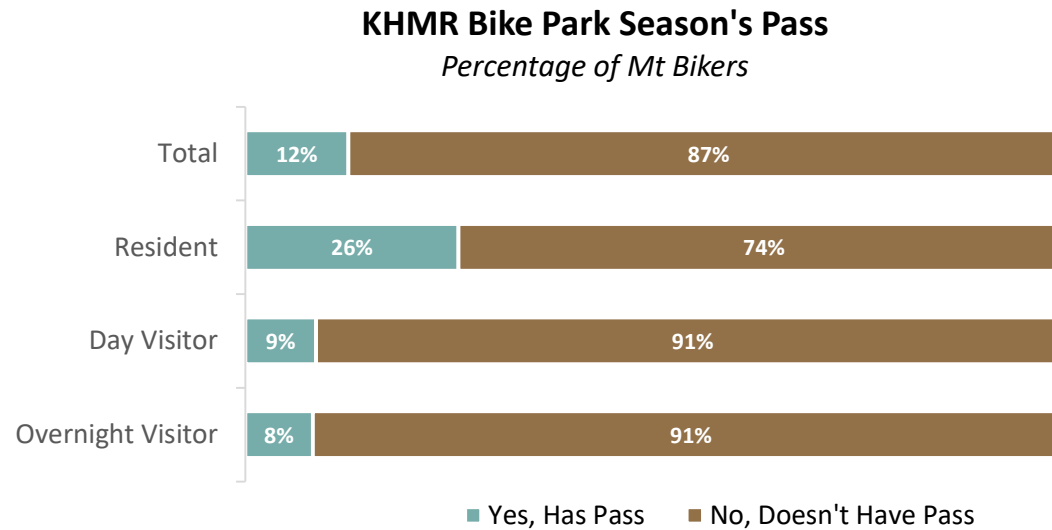
Donated/Plan to Donate to GCC	Residents	Day Visitors	Overnight Visitors	Total
Yes	72%	23%	30%	39%
No	14%	41%	38%	33%
Not Sure	12%	35%	31%	27%
Prefer Not to Answer	3%	1%	1%	1%

Q. Have you, or do you plan to, donate to the Golden Cycling Club this trip or season?

Base: All intercept respondents, n=645.

3.1.6. KHMR Bike Park Pass

Overall, approximately 12% of Mountain Bikers have a season's pass at the KHMR Bike Park. Not surprisingly this is higher for residents where 26% have a Season's Pass to the Bike Park compared to only 9% of Day Visitors and 8% of Overnights Visitors.

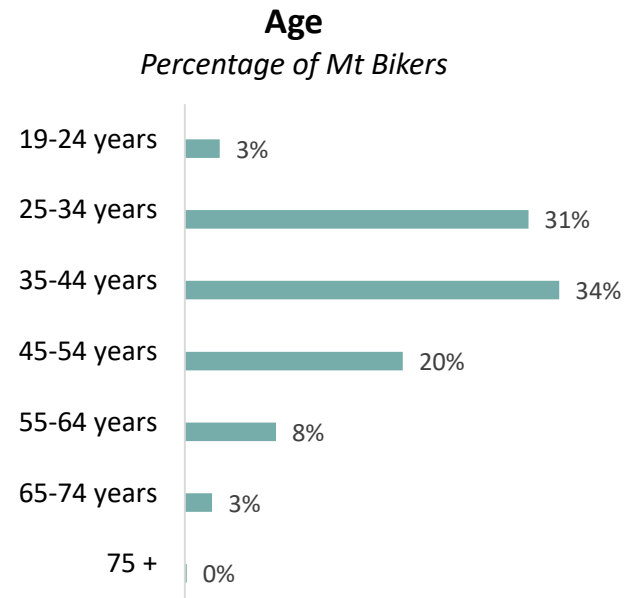
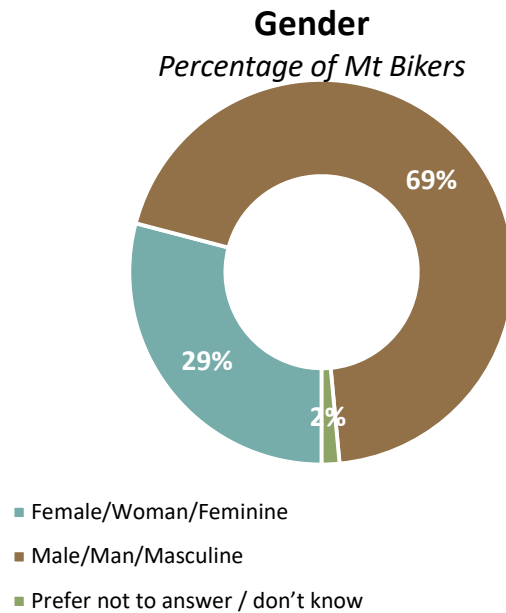


Q. Do you have a 2023 season's pass for the Bike Park at Kicking Horse?

Base: All intercept respondents, n=645, Resident n=280, Day Visitors n=105, Overnight Visitors n=259.

3.1.7. Demographics

Mountain Bikers tend to skew younger with 68% being under the age of 45 years old. In fact, 31% are between 25-34 years old while 34% are between 35-44 years old. Golden mountain bikers are more likely to be male (69%).

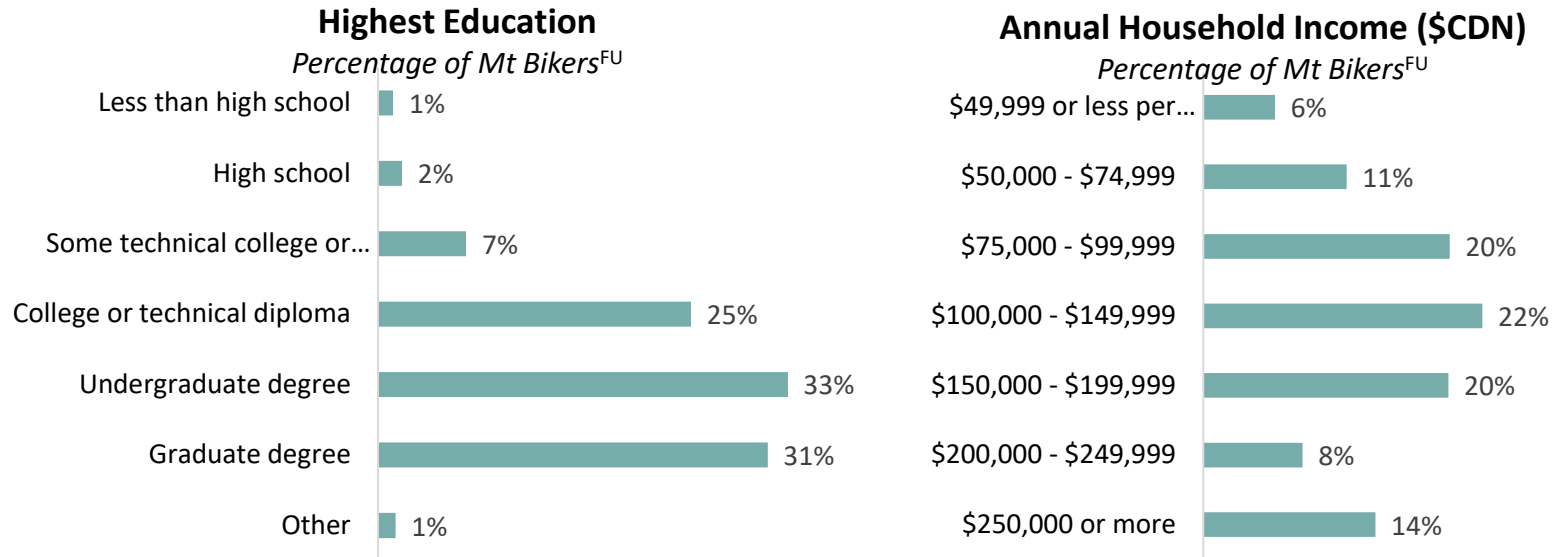


Age	Residents	Day Visitors	Overnight Visitors	Total
19-24 years	5%	2%	3%	3%
25-34 years	22%	48%	31%	31%
35-44 years	33%	27%	36%	34%
45-54 years	25%	16%	19%	20%
55-64 years	10%	4%	9%	8%
65-74 years	3%	3%	2%	3%
75 years or older	0%	1%	0%	0%

Q. In which of the following age categories are you? / Q. What gender do you identify as?

Base: All intercept respondents, n=645.

Golden Mountain Bikers tend to be relatively affluent and educated. In fact, nearly two-thirds (64%) have an undergraduate degree or higher and 42% have household incomes of \$150,000 or more.



Q. What is the highest level of education you have completed?

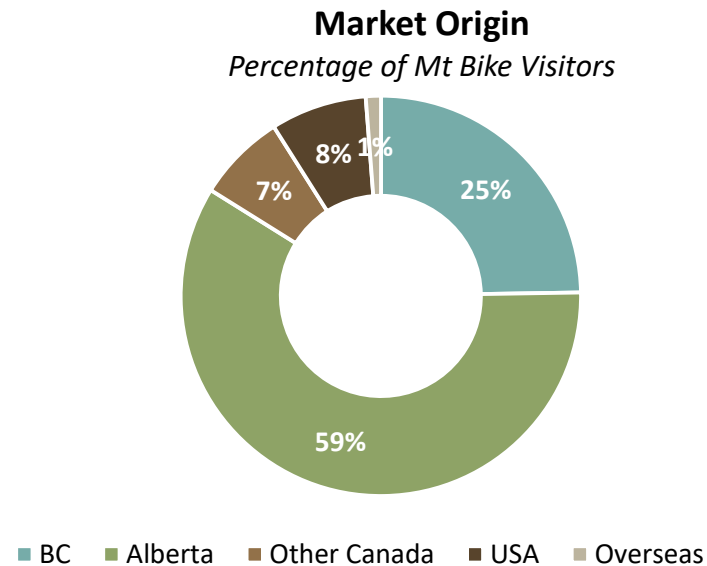
Q. Before taxes, what is your approximate annual household income in Canadian dollars?

Base: All follow up respondents, n=354/299.

3.2. Golden Mountain Biker Visitor Profile

3.2.1. Market Origin

Mountain Biker Visitors are primarily from Alberta (59%) and British Columbia (25%). Although Alberta is consistent between both Day and Overnight Visitors, Day Visitors are more likely than Overnight Visitors to be from BC (39% vs. 21%, respectively).



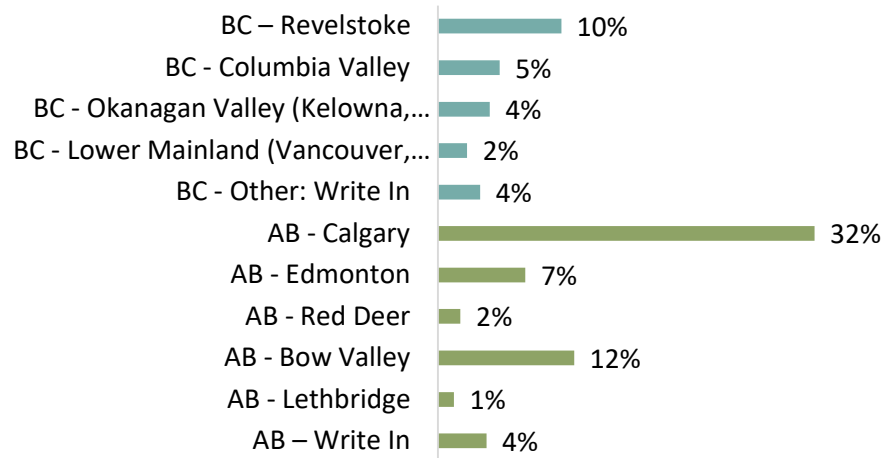
Market Origin	Day Visitor	Overnight Visitor	Total Mt Bike Visitors
BC	39%	21%	25%
Alberta	59%	59%	59%
Other Canada	2%	9%	7%
USA	0%	10%	8%
Overseas	0%	2%	1%

Q. Where do you live? / What community do you live in? / What province do you live in?

Base: All Non-Resident Intercept respondents, Total n=365, Day = 105, Overnight = 259.

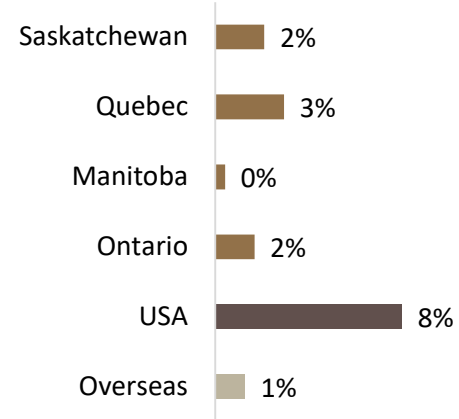
Origin of BC/AB Visitors

Percentage of Mt Bike Visitors



Origin of Visitors from Other Canada and USA

Percentage of Mt Bike Visitors



Q. Where do you live? / What community do you live in? / What province do you live in?

Base: All Non-Resident Intercept respondents, Total n=365.

3.2.2. Length of Stay – Overnight Mt Bike Visitors

On average, Overnight Mountain Bike Visitors are on trips that average 5.2 nights, of which 2.6 nights are spent in Golden. This demonstrates that there may be an opportunity to extend the portion of their trip in Golden. It should also be noted that approximately 20% of Day Visitors are also on trips but just not staying overnight in Golden. This suggests there is also an opportunity to encourage Day Visitors to actually stay overnight in Golden rather than stay in other communities and just visit for the day.



Average Number of Nights on Trip:

5.2



Average Number of Nights in Golden:

2.6

Length of Stay	Overnight Visitors
Average nights on trip	5.2
Average nights in Golden	2.6

Q. What is your total trip length - that is, how many nights are you away from home on this trip? / Q.

Base: All Overnight Visitor Intercept respondents, Total n=242 / 245.

3.2.3. Travel Party

On average, Mountain Bike Visitors are in a travel party of 2.4 people. Not surprisingly, Overnight Mountain Bike Visitors have slightly larger travel parties. Overall, 17% of travel parties include children under the age of 18 years old. Again, Overnight Mountain Bike Visitors are more likely to have children in their travel party (19% vs. 12% of Day Visitor Parties).

Average Travel Party Size:

2.4 people (2.1 adults, 0.3 children under 18)

% with Children in Travel Party:

17%



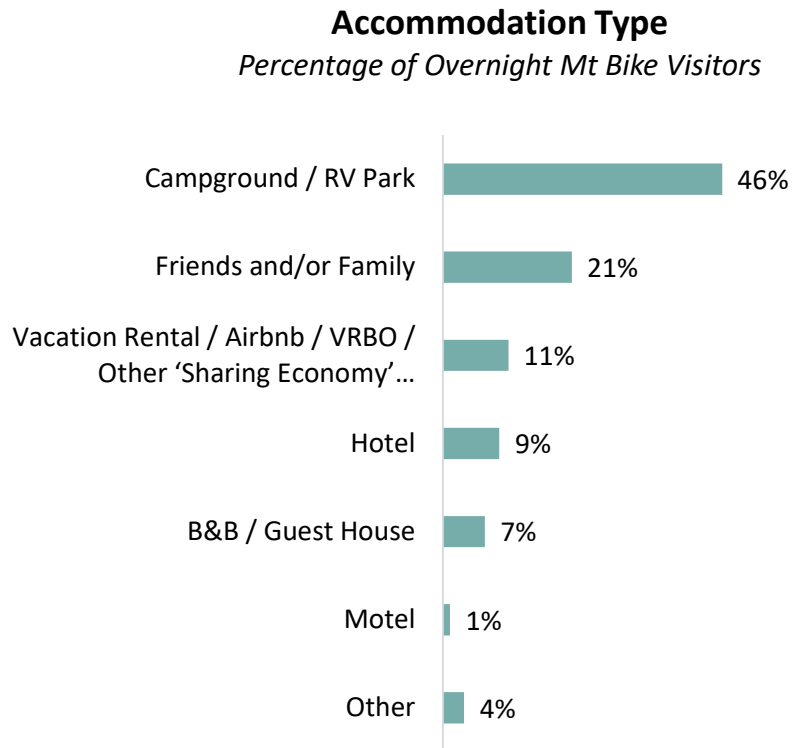
Travel Party	Day Visitor	Overnight Visitor	Total Visitors
Travel Party Size	2.1	2.5	2.4
Adults	1.9	2.2	2.1
Children (under 18)	0.2	0.4	0.3
% with Children (under 18)	12%	19%	17%

Q. We just have some questions about your trip to Golden in general. You mentioned you are a visitor to Golden, including yourself, how many people are in your travel party? How many are children under 18 and how many are adults?

Base: All Visitor Intercept respondents, Total n=364.

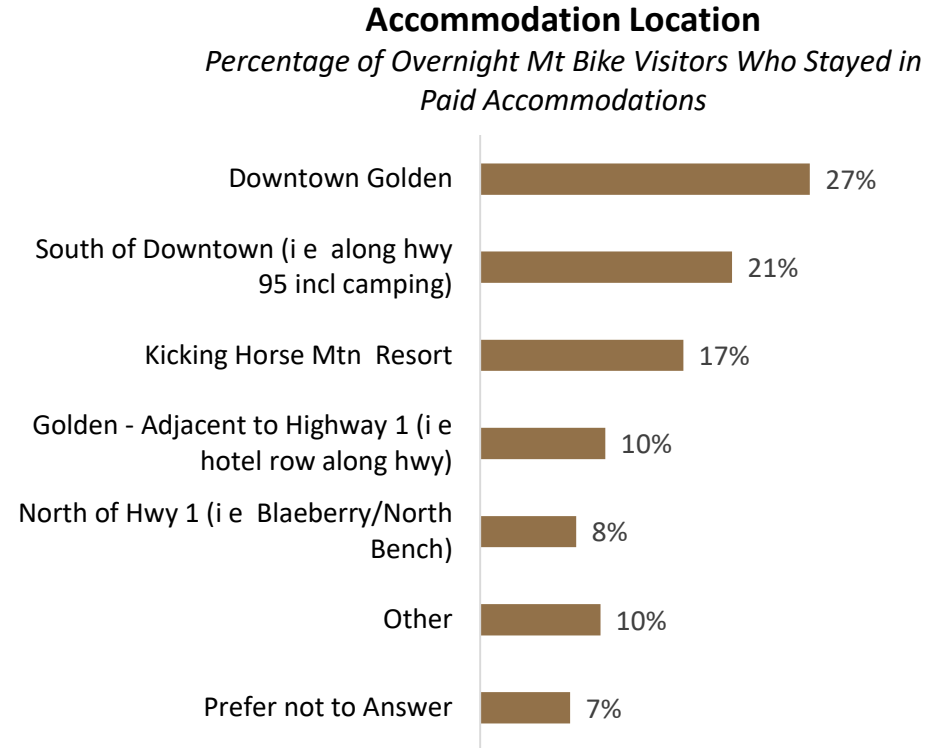
3.2.4. Accommodations – Overnight Mt Bike Visitors

Overnight Mountain Bike Visitors primarily stay at a campground (46%) or with Friends/Family (21%). The most popular locations for accommodation are Downtown Golden (27%), south of Downtown Golden (21%) and at KHMR (17%).



Q. Which of the following best describes your primary (most often used) type of accommodation on this trip while in Golden?

Base: All Overnight Visitor Intercept respondents, n=259.



Q. And is your accommodation located in...?

Base: All Overnight Visitor Intercept respondents staying in paid accommodations, n=203.

3.2.5. Mountain Biking Days in Golden – Overnight Mt Bike Visitors

On average, Overnight Visitors stay 2.6 nights in Golden and bike for 2.3 days or approximately 87% of their days in Golden. This demonstrates that the primary activity in Golden is biking – although biking appears to be done every day, it doesn't take up the entire day necessarily therefore cross-marketing of other activities and amenities available in Golden can be useful.

Average Length of Stay:

2.6 Nights



Average Number of Biking Days:

2.3 Days

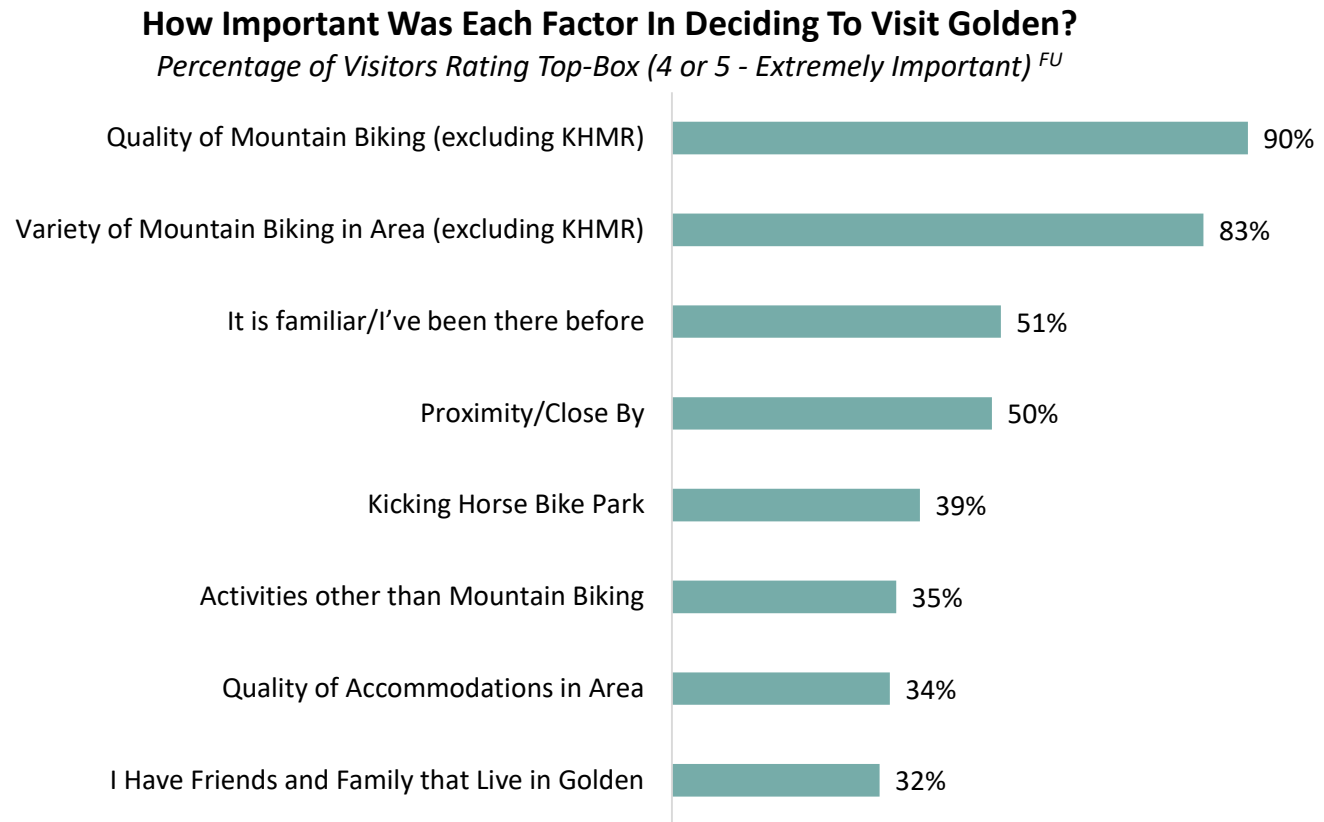


% of Days Mountain Biking:

87%

3.2.6. Factors For Choosing Golden

Quality and variety of mountain biking are key drivers in choosing to visit Golden. In fact, 90% noted that the quality of Mountain Biking was ‘4’ or ‘5- Extremely Important’ on a five-point scale where ‘1’ is ‘Not at all Important’ and ‘5’ is ‘Extremely Important’ while 83% rated the variety as the same. Familiarity (51%) and proximity (50%) are also factors when choosing where to visit for mountain biking. Not surprisingly, proximity is more of a factor for day visitors than overnight visitors while overnight visitors are more concerned about activities other than mountain biking and the quality of accommodations in a destination. The sample size of day visitors is too small to display therefore Total Mountain Biking Visitors is shown in graph below.



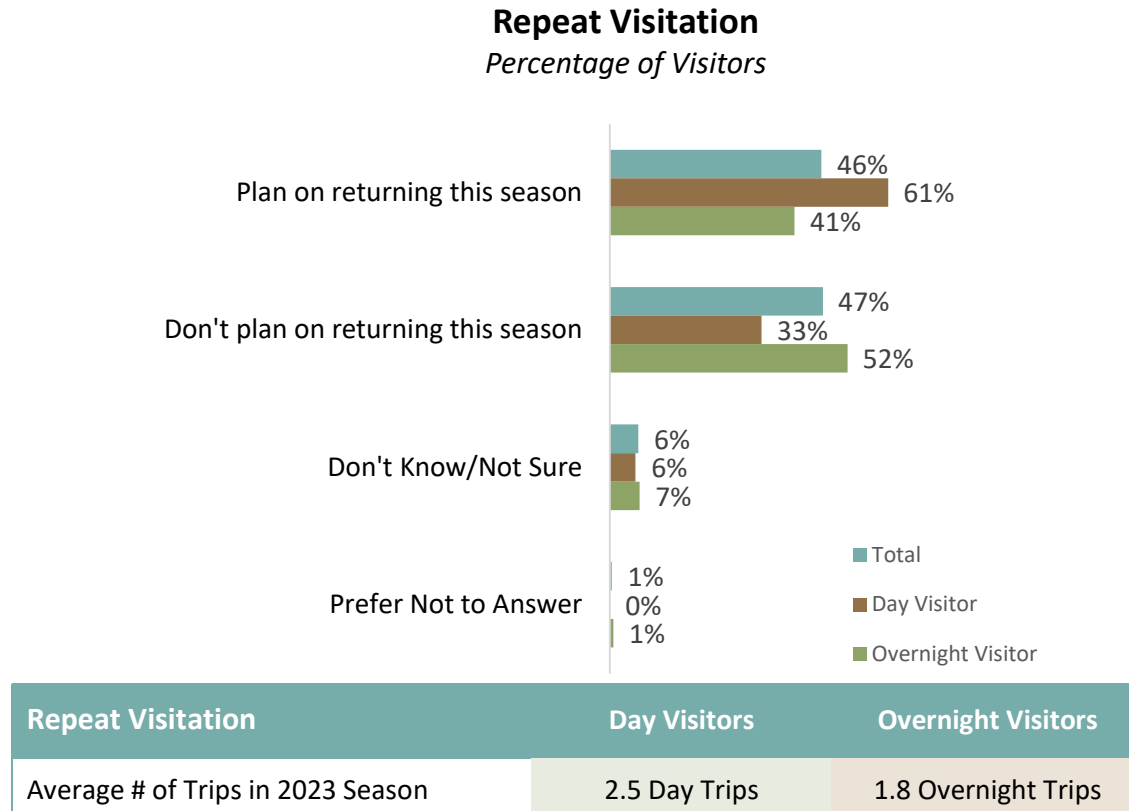
Scale: 1 = Not At All Important to 5 = Extremely Important

Q. How important were each of the following factors in deciding to visit Golden on that trip?

Base: All Visitor Follow Up respondents excluding DK/PNA, n=77-87.

3.2.7. Repeat Visitation

Day Mt Bike Visitors are more likely to plan more than one trip for the 2023 season with 61% noting that they plan on returning this season compared to only 41% of Overnight Mt Bike Visitors. Given that Overnight Mt Bike Visitors are more likely to be from further away, this is not surprising. On average, Day Visitors take 2.5 day bike trips in the 2023 season and Overnight Mt Bike Visitors take 1.8 overnight bike trips to Golden in the 2023 season.

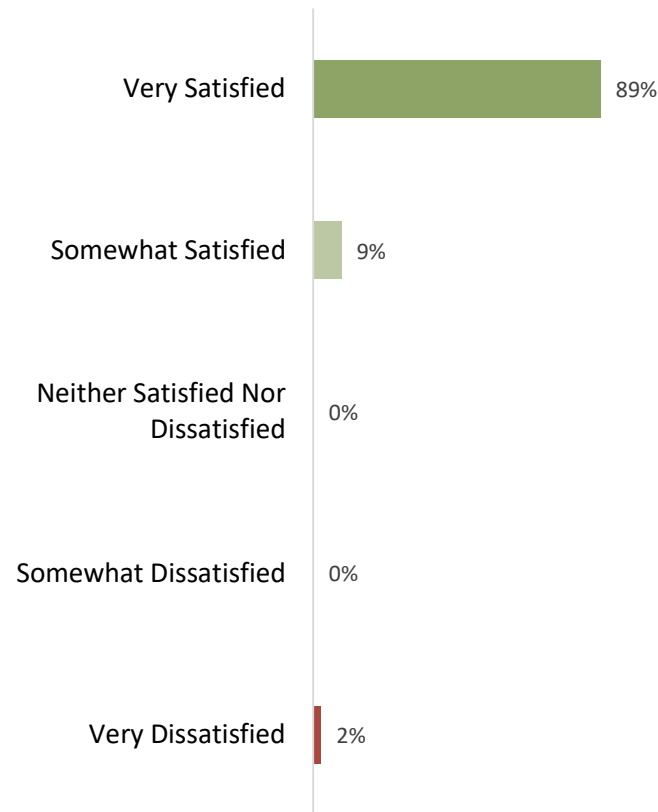


Q. Including this trip, what is your best estimate as to how many [day trips/overnight] you have/will personally make to Golden to ride over the summer 2023 season? Base: All Visitor Intercept respondents, Total n= 364, Day Visitors n=105, Overnight Visitors n=259.

3.2.8. Travel Satisfaction

Overall, visitors are very satisfied with their trip in Golden. In fact, 98% gave a top-box score on a scale of 1 to 5 where 1 is ‘Very Dissatisfied’ and 5 is ‘Very Satisfied’. Generally all elements of their stay are also positively rated although the attractiveness along the highway appears to be a bit of a pain point.

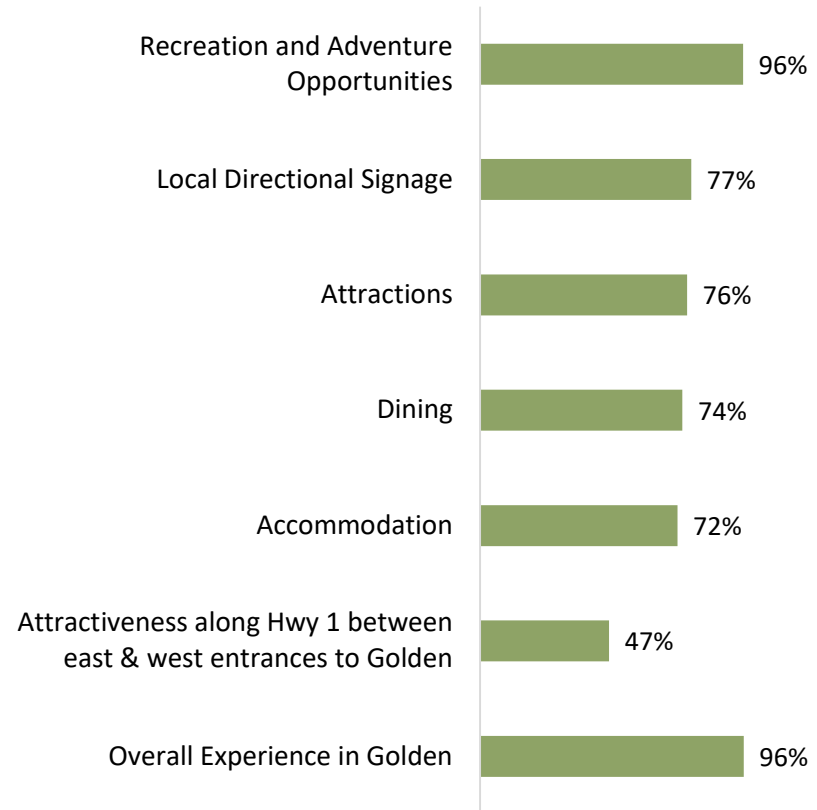
Overall Satisfaction with Trip while in Golden
Percentage of Visitors^{FU}



Q. Overall, how satisfied are you with that trip while in Golden?

Base: All Visitor follow up respondents excluding DK/NA, Total Visitors n= 80.

Experience of Each Component while in Golden
Percentage of Visitors Rating Top-Box (4 or 5 - Excellent)^{FU}



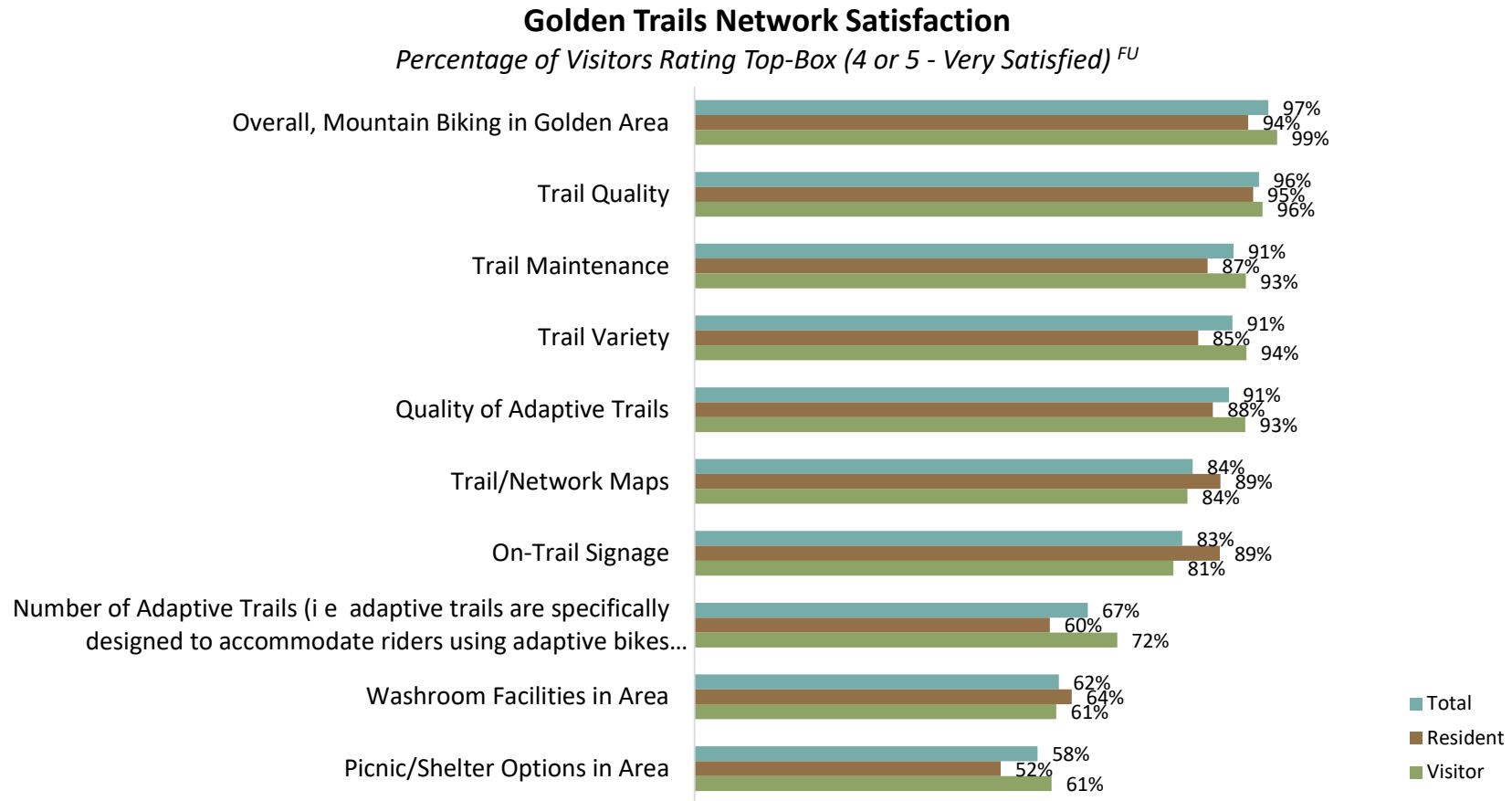
Q. On a scale of 1 to 5, where 1 is ‘Very Poor’ and 5 is ‘Excellent’, please rate your experience of each component of your visit to Golden?

Base: All Visitor follow up respondents excluding DK/NA, Total Visitors n= 43-80.

3.3. Mountain Biking Experience in Golden

3.3.1. Trail Network Evaluation

Satisfaction with the Golden Mountain Bike trail network is very high with 97% rate their overall satisfaction as '4' or '5 – Very satisfied' on a scale of 1 to 5 where 1 is 'Very Dissatisfied' and 5 is 'Very Satisfied'. Most of the elements presented are highly rated although it does appear that there could be improvements for picnic/shelter options, washroom facilities and the number of adaptive trails – particularly according to Resident riders. Other than Trail Quality and Washroom Facilities, ratings vary between Residents and Visitors for the presented trail network features.



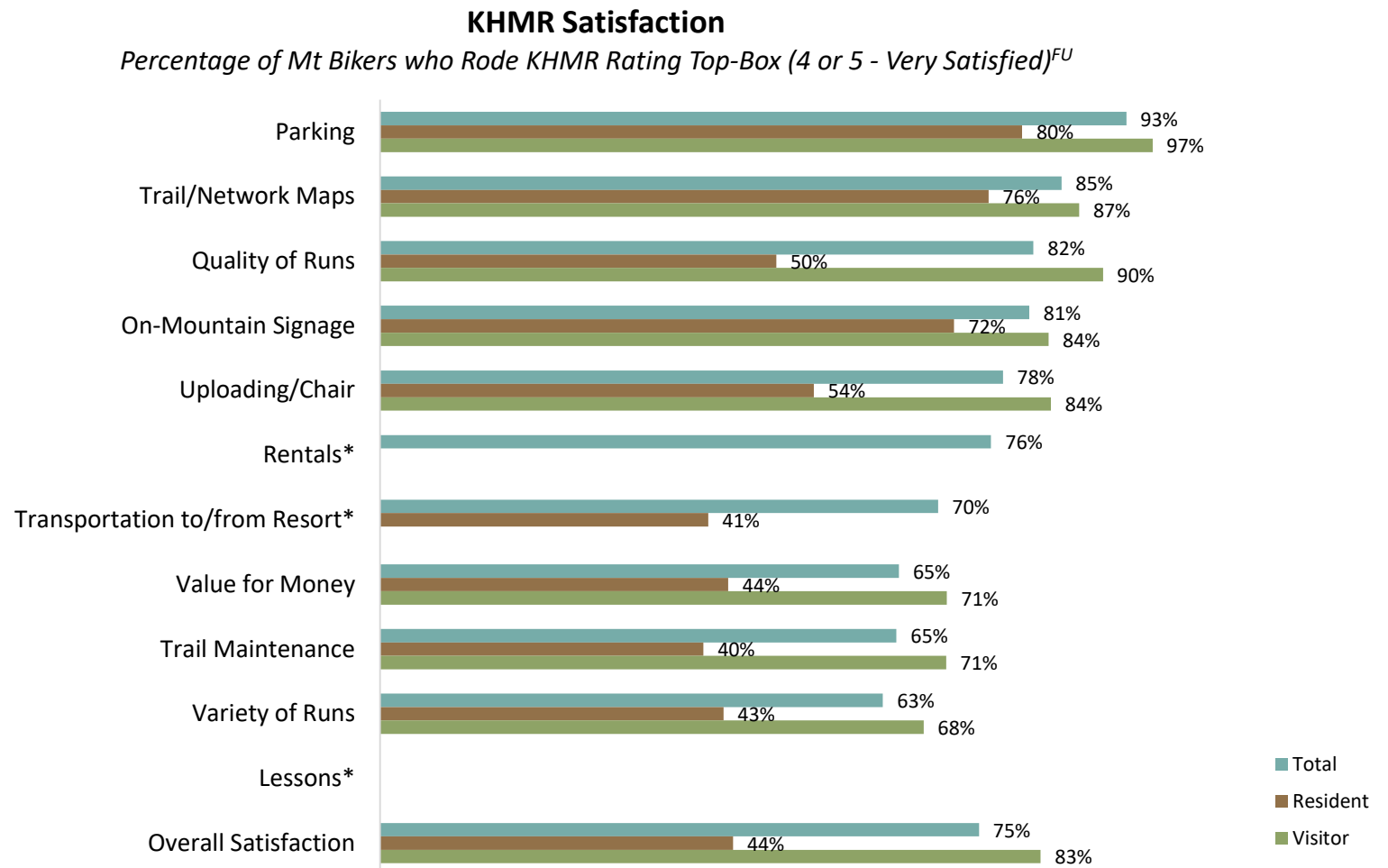
Scale: 1 = Very Dissatisfied to 5 = Very Satisfied

On a scale of 1 to 5, where 1 = Very Unsatisfied and 5 = Very Satisfied, how satisfied are you with the following mountain biking elements while in Golden/Golden area?

Base: All follow up respondents n=250-371, Residents n=221-292, Visitors n=28-79.

3.3.2. KHMR Bike Park Evaluation

Satisfaction with KHMR Bike Park varies dramatically between Residents and Visitors. In fact, only 44% of Residents are satisfied overall with the Biker Park at KHMR compared to 83% of Visitors. Some of the key issues for Residents are the trail maintenance (41% dissatisfied), variety of runs (38% dissatisfied) and quality of runs (36% dissatisfied).



Scale: 1 = Very Dissatisfied to 5 = Very Satisfied

On a scale of 1 to 5, where 1 = Very Unsatisfied and 5 = Very Satisfied, how satisfied are you with the following aspects of Kicking Horse Bike Park?

Base: All follow up respondents who rode the Bike Park in 2023 excluding DK/NA n=18-131, Residents n=16-99, Visitors n=2-31.

* Caution, small sample sizes, results with sample less than 30 have been suppressed.

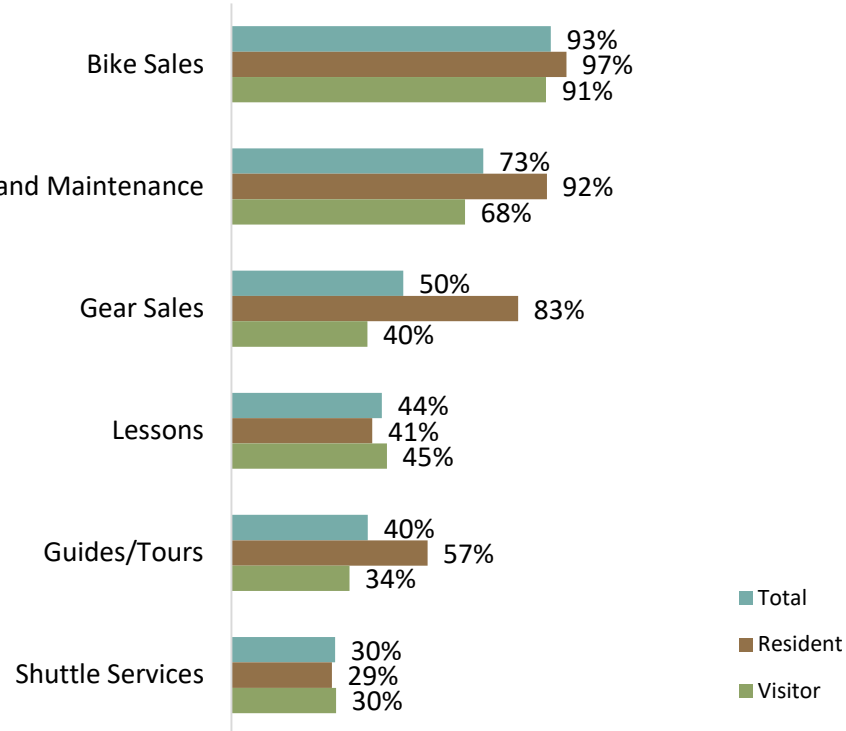
3.3.3. Mountain Biking Products & Services

Importance

The most important mountain bike-related service to have available in Golden is Bike Sales. In fact, 93% rated Bike Sales as '4' or '5-Very Important' on a scale of 1 to 5 where 1 is 'Not Important at All' and 5 is 'Very Important'. Bike Repairs and Maintenance (73%) and Gear Sales (50%) round out the top three most important services available in Golden/Golden Area. It should be noted that the latter two services are notably more important to Resident riders as they depend on the local support infrastructure more than visitors.

Importance of Mountain Bike-Related Services Available in Golden

Percentage of Visitors Rating Top-Box (4 or 5 - Very Important) ^{FU}



Scale: 1 = Not Important at All to 5 = Very Important

Q. How important are each of the following to have locally available in Golden/Golden Area?

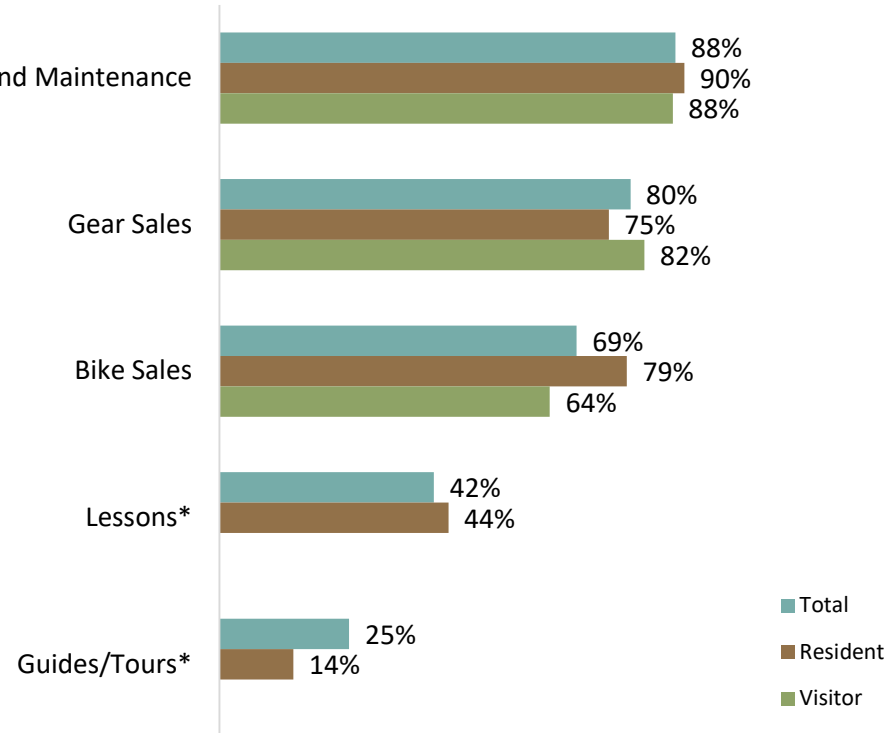
Base: All follow up respondents excluding DK/PNA n=363-368, Residents n=281-285, Visitors n=79-80.

Satisfaction

Bike Repairs and Maintenance has the highest satisfaction levels with 88% rating this service as '4' or '5 – Very Satisfied' on a scale of 1 to 5 where 1 is 'Very Dissatisfied' and 5 is 'Very Satisfied'. Gear Sales performance is also very strong with 80% providing a top-box rating. Bike Sales is moderate at 69%; however, it is higher among Residents (79% vs 64% for Visitors) who, arguably, are more likely to use this service locally.

Satisfaction with the Mountain Bike-related Services Available in Golden

Percentage of Visitors Rating Top-Box (4 or 5 - Very Satisfied) ^{FU}



Scale: 1 = Very Dissatisfied to 5 = Very Satisfied

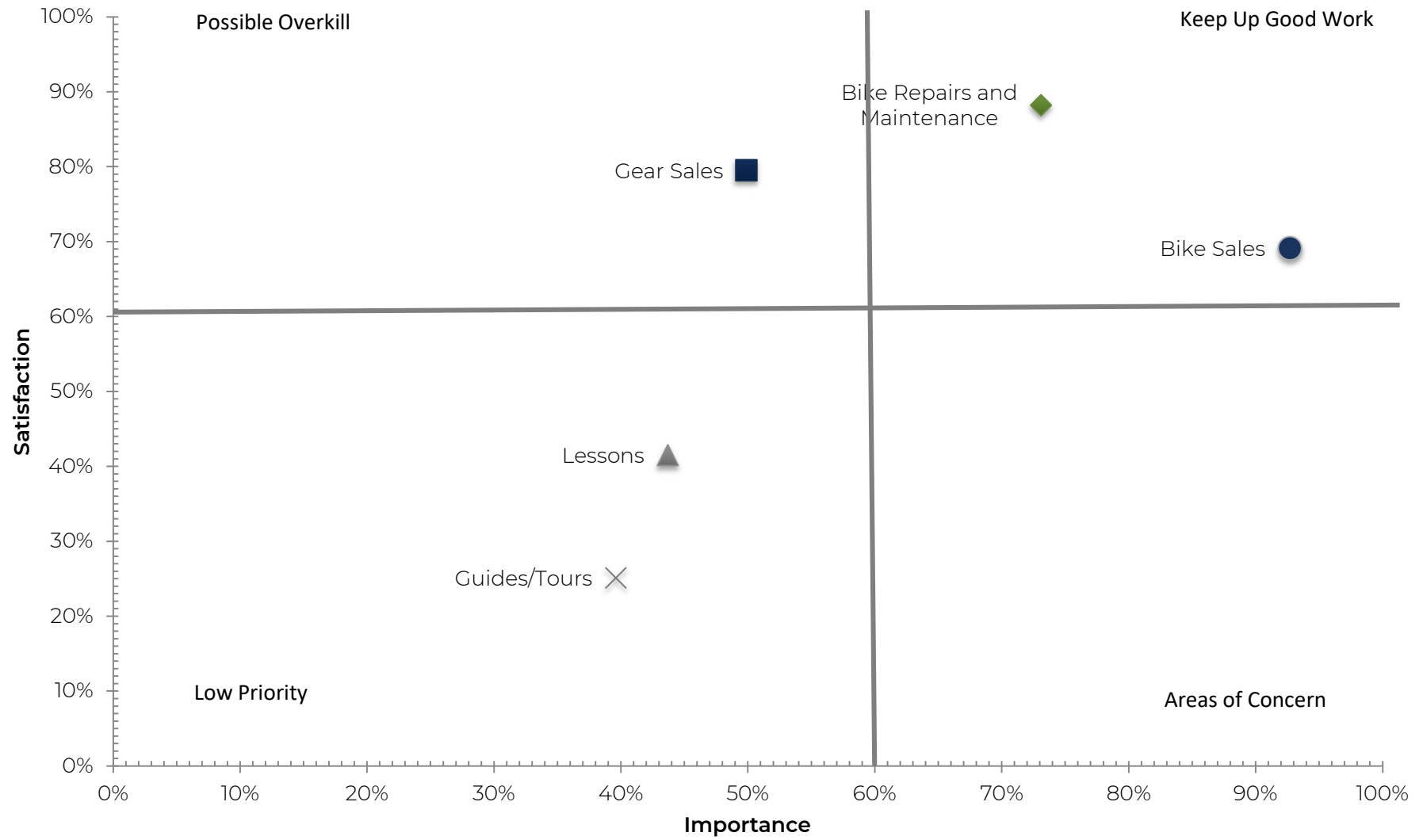
Q. How satisfied are you with the Mountain Bike-related services available in Golden/Golden Area?

Base: All follow up respondents excluding DK/PNA n=111-340, Residents n=98-277, Visitors n=12-55.

*Caution – low sample size therefore results have been suppressed.

Importance-Performance Matrix

The matrix below shows that there are no mountain biking-related services that are of large concern in Golden. That said, this varies a little for Residents where Gear Sales moved to the upper right quadrant (keep up the good work) but Bike Sales' satisfaction is on the border between the upper and lower right quadrants suggesting that this service could be improved given it is the most important support service.

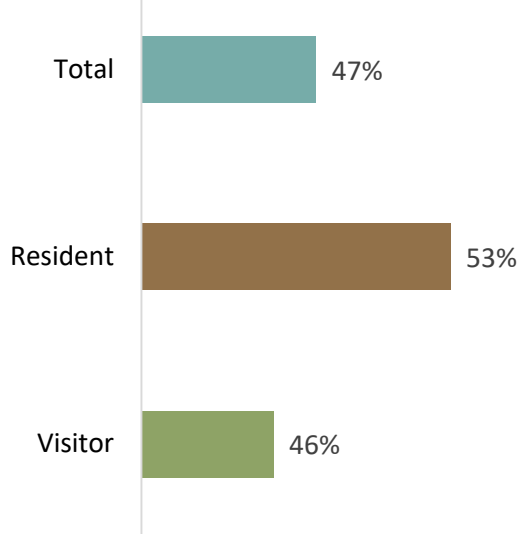


3.3.4. Interest in Purchasing Regionally-Made Mountain Bikes/Parts/Gear and KORE Awareness

There is moderate interest in purchasing regionally-made mountain bike bikes/parts/gear with 47% responding as '4' or '5-Extremely Interested'. Residents are more interested than Visitors (53% vs. 46%) in purchasing regionally-made equipment/gear. Despite this interest, awareness of the Kootenay Outdoor Recreation Enterprise Initiative (KORE) is low at 7% overall. Residents are more likely to be aware; however, only 15% have heard of KORE before. For reference, KORE is a Kootenay-based, non-profit, grassroots organization dedicated to makers and creators in the outdoor manufacturing sector. Part of their mission is to develop the locally-made, craft outdoor gear and equipment business segment. Their tag is "It's the craft gear from here."

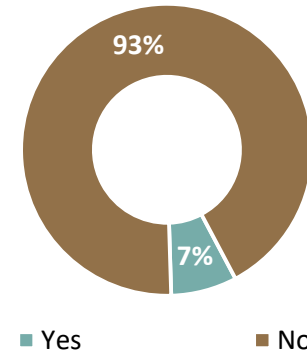
Interest in Purchasing Regionally-made Mountain Bike Bikes/Parts/Gear

Percentage of Visitors Rating Top-Box (4 or 5 - Extremely Interested)^{FU}



Awareness of Kootenay Outdoor Enterprise Initiative or KORE

Percentage of Visitors^{FU}



KORE Awareness	Resident	Visitor	Total
Yes	15%	5%	7%
No	86%	95%	93%

Scale: 1 = Not Interested at All to 5 = Extremely Interested

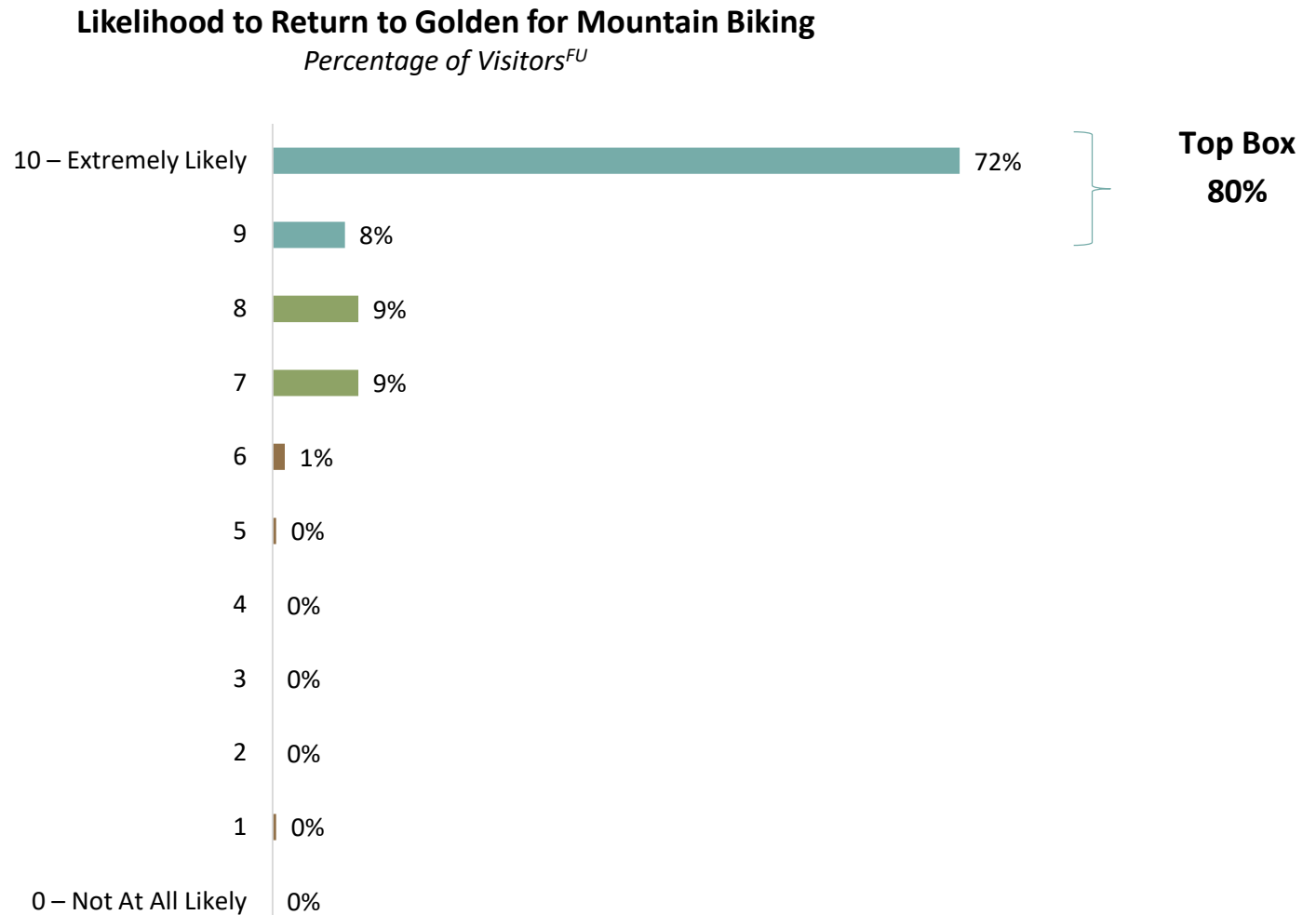
Q. How interested are you/would you be purchasing regionally-made mountain bike bikes/parts/gear?

Q. Have you heard of the Kootenay Outdoor Recreation Enterprise Initiative or KORE?

Base: All follow up respondents excluding DK/NA n=348-372, Residents n=273-289, Visitors n=73-80.

3.3.5. Intent to Return

Visiting mountain bikers have a very high likelihood of returning to Golden for mountain Biking. In fact, 80% noted they were '9' or '10 - extremely likely' to return for mountain biking.



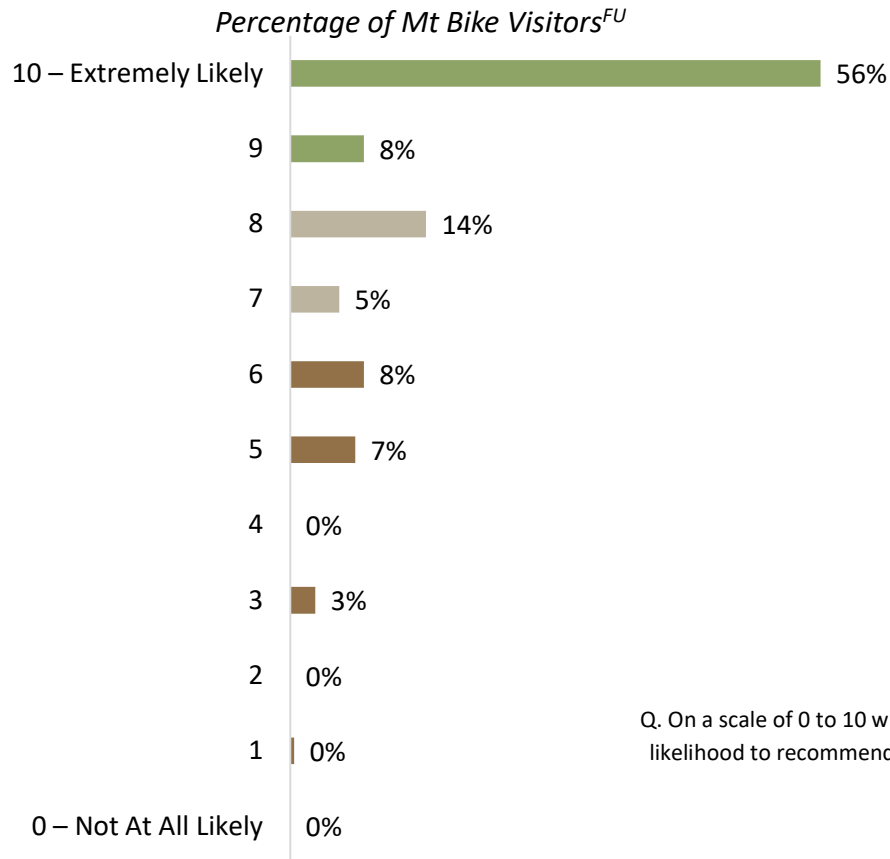
Q. On a scale of 0 to 10 where 0 is 'Not Likely at All' and 10 is 'Extremely Likely', how would you rate your likelihood to return to Golden for Mountain Biking?

Base: All visitors in the follow up sample, n=77.

3.3.6. Net Promoter Score (NPS) – Travel Destination

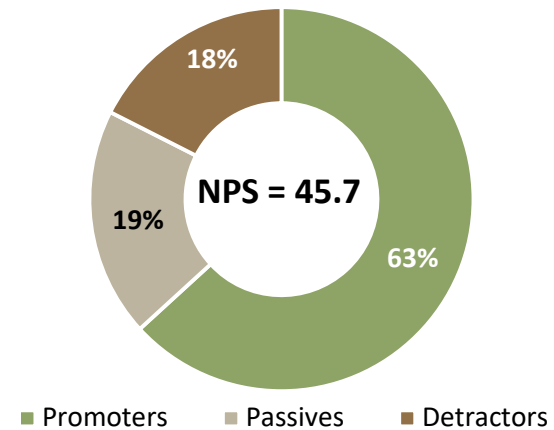
As a travel destination, the Net Promoter Score is 45.7 among mountain bike visitors with 63% being promoters of the destination. Based on data from Tourism Golden, the NPS score for Visitors overall during a similar time frame is 30.0. This suggests that Mountain Bike Visitors have a higher overall advocacy for Golden as a travel destination than visitors overall.

Likelihood to Recommend Golden as a Travel Destination



Golden's Overall Net Promoter Score

Percentage of Mt Bike Visitors^{FU}

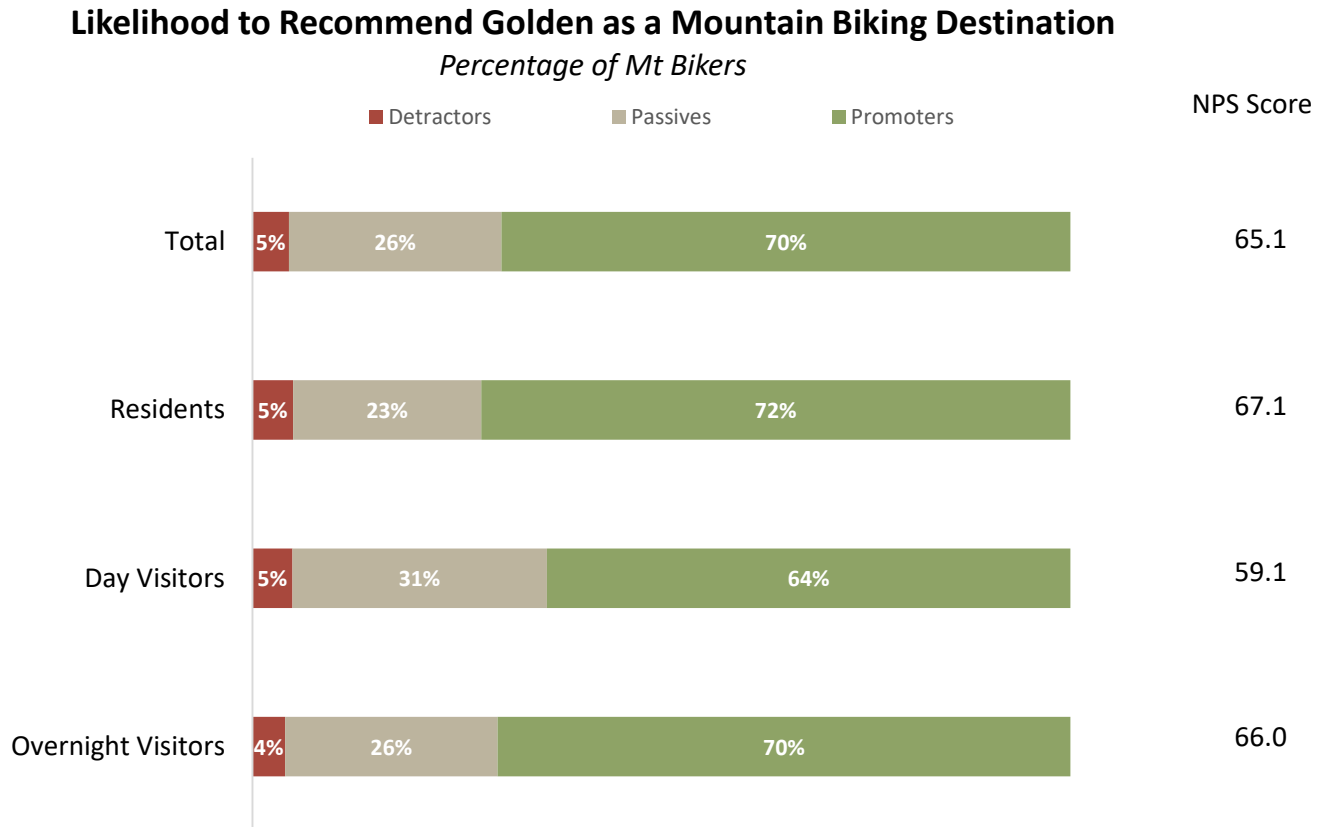


Q. On a scale of 0 to 10 where 0 is 'Not Likely at All' and 10 is 'Extremely Likely', how would you rate your likelihood to recommend Golden as a travel destination or a place to visit to friend, family or colleagues:

Base: Visitor follow up respondents n=77.

3.3.7. Net Promoter Score (NPS) – Mountain Biking Destination

Advocacy of Golden as a Mountain Biking destination is very high with a total NPS Score of 65.1 with Residents having the highest score of 67.1.

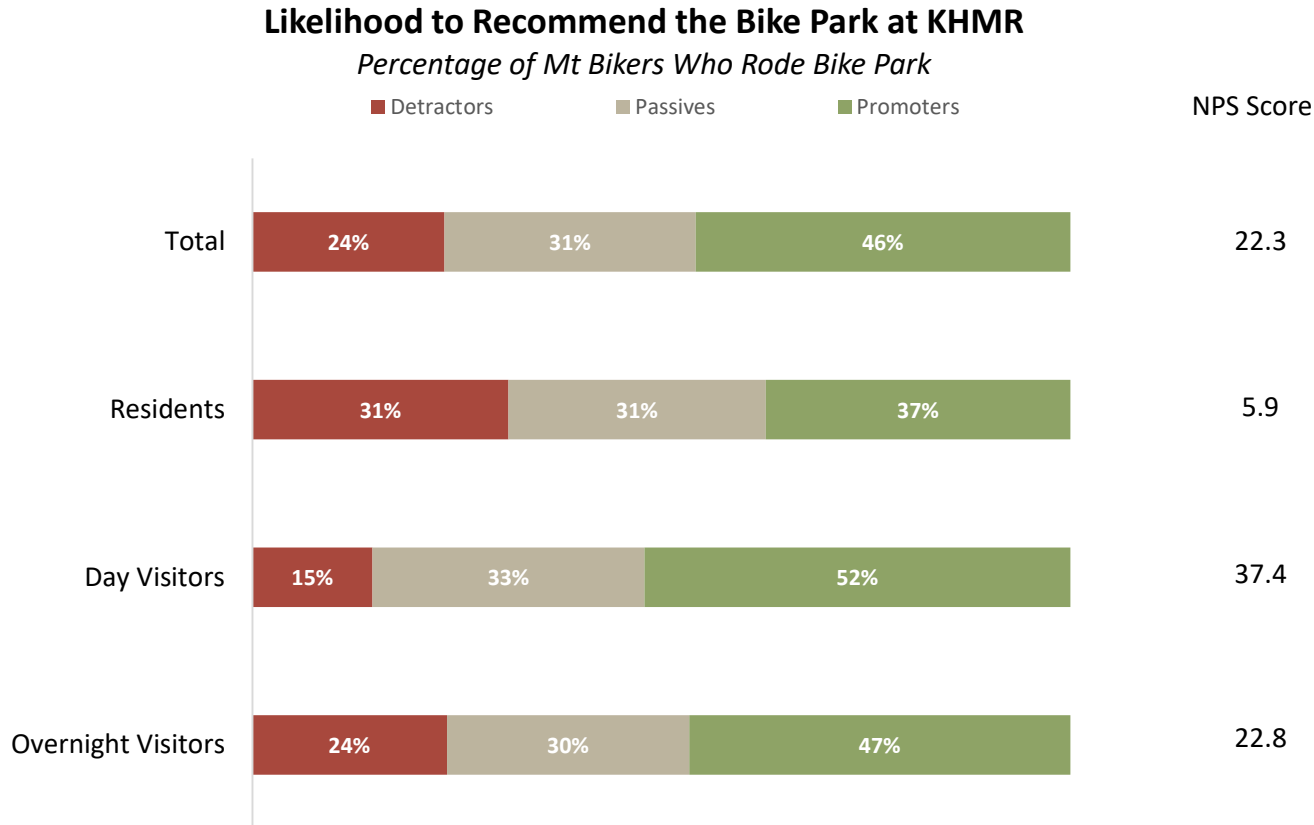


Q. On a scale of 0 to 10 where 0 is not likely at all and 10 is extremely likely, how likely are you to recommend Golden as a mountain biking destination?

Base: All intercept respondents excluding PNA/DK Total n=633, Residents n = 279, Day Visitors n= 103, Overnight Visitors n=250.

3.3.8. Net Promoter Score (NPS) – KHMR

Advocacy of the KHMR Bike Park is notably lower than the destination as a whole with a total NPS of only 22.3. Residents have a notably low NPS Score of only 5.9 with 31% being detractors. Day Visitors are the most likely to be promoters of the Bike Park at KHMR although their score is still lagging at 37.4.



Q. How likely are you to recommend the Bike Park at Kicking Horse Mountain Resort to other riders?

Base: All intercept respondents who were riding the Bike Park excluding PNA/DK Total n=222, Residents n = 86, Day Visitors n= 48, Overnight Visitors n=88.

3.4. Economic Impact

3.4.1. Expenditures

Overall, the direct spend by mountain bikers in Golden in 2023, excluding the Golden 24 event, was \$5.78 million. Residents account for a spend of approximately \$3 million while visitors spent three-quarters of a million dollars (\$725,588) on mountain biking-related expenses in Golden and an additional \$1.96 million on their trip related expenses (i.e. accommodation, food & beverage, etc.) in the Golden area during the season.

Source	Estimated Spend
Residents – Mountain Biking - Related Spend in Golden	\$3,093,937
Visitors – Mountain Biking - Related Spend in Golden	\$725,588
Visitors – Trip-Related Spend in Golden	\$1,961,161
TOTAL Expenditures in GOLDEN	\$5,780,686

Mountain Bike - Related Expenditures

Total Spend by Mountain Bike Expense Type	Residents 2023 Season	Visitors 2023 Season	Total 2023 Season
Mountain Bike Tickets (i.e. Kicking Horse Bike Park)	\$126,164	\$351,440	\$477,604
Mountain Bike Rentals (including safety equipment)	\$8,311	\$50,220	\$58,531
Mountain Bike Tour or Guiding Services	\$9,901	\$2,060	\$11,961
Mountain Bike Parts	\$848,759	\$68,530	\$917,288
Mountain Bike Maintenance/Repairs	\$673,005	\$52,036	\$725,041
Shopping/Retail purchases related to Mountain Biking	\$1,326,977	\$201,303	\$1,528,280
Other Mountain Biking Expenses	\$100,805	--	\$100,805
Total Mountain Biking Expenses	\$3,093,937	\$725,588	\$3,819,526

Seasonal/Trip Spend by Mountain Bike Expense Type	Residents (per person seasonal avg)	Visitors (per person/trip in season avg)	Day Visitors (per person/trip in season avg)	Overnight Visitors (per person/trip in season avg)
Mountain Bike Tickets (i.e. Kicking Horse Bike Park)	\$73.78	\$27.94	\$23.01	\$29.79
Mountain Bike Rentals (including safety equipment)	\$4.86	\$3.99	\$3.57	\$4.15
Mountain Bike Tour or Guiding Services	\$5.79	\$0.16	\$0.00	\$0.23
Mountain Bike Parts	\$496.35	\$5.45	\$3.95	\$6.01
Mountain Bike Maintenance/Repairs	\$393.57	\$4.14	\$1.44	\$5.15
Shopping/Retail purchases related to Mountain Biking	\$776.01	\$16.00	\$6.28	\$19.66
Other Mountain Biking Expenses	\$58.95	--	--	--
Total Mountain Biking Expenses	\$1,809.32	\$57.68	\$38.25	\$64.99

Trip Expenditure in Golden (Visitors Only)

Total Trip Expenditure	Visitors 2023 Season	Day Visitors 2023 Season	Overnight Visitors 2023 Season
Accommodation (if overnight) ¹	\$285,181	--	\$285,181
Transportation	\$451,897	\$69,363	\$382,533
Food and Beverage	\$673,334	\$103,353	\$569,981
Shopping	\$182,210	\$27,968	\$154,242
Attractions	\$122,193	\$18,756	\$103,437
Other Outdoor Recreation	\$136,707	\$20,984	\$115,723
Entertainment	\$46,876	\$7,195	\$39,681
Other Travel-Related Expenditures	\$62,763	\$9,634	\$53,130
Average Per Person Trip Expenses	\$1,961,161	\$257,252	\$1,703,908

¹BC Stats estimates room revenues were \$15.5 million for the Columbia Shuswap regional district from July-August 2023. Downloaded on December 13, 2023. This means Mountain Bikers equal about 2% of accommodation revenues. This is consistent with Tourism Golden's visitor survey which notes that approximately 3% of summer visitors are in Golden for mountain biking.

Average Per Person/Trip Expenditure	Visitors (per person/trip in season avg)	Day Visitors (per person/trip in season avg)	Overnight Visitors (per person/trip in season avg)
Accommodation (if overnight)	\$22.67	--	\$31.20
Transportation	\$35.92	\$20.18	\$41.84
Food and Beverage	\$53.53	\$30.07	\$62.35
Shopping	\$14.49	\$8.14	\$16.87
Attractions	\$9.71	\$5.46	\$11.31
Other Outdoor Recreation	\$10.87	\$6.10	\$12.66
Entertainment	\$3.73	\$2.09	\$4.34
Other Travel-Related Expenditures	\$4.99	\$2.80	\$5.81
Average Per Person Trip Expenses	\$155.91	\$74.85	\$186.39

3.4.2. Economic Impact (Direct, Indirect, Induced)

Estimates of Golden mountain bike-related business spending and employment together with incremental visitor spending were used as inputs to the Tourism Regional Input-Output Model. The economic impact estimates include:

- Locals annual spending on mountain bike equipment,
- Locals spending day-to-day mountain biking costs (e.g. tickets, maintenance, repairs),
- Visitors spending on mountain bike equipment,
- Visitor spending day-to-day mountain biking costs (e.g. tickets, maintenance, repairs),
- Visitors spending on travel expenses while in Golden, and
- Impacts from operations of Golden mountain biking-dependant businesses.

This research DOES NOT include economic impacts from:

- Visitor trip spending outside of Golden.
- Social and cultural impacts of mountain biking in the areas.

Economic impacts were calculated for Columbia Shuswap Regional District (CSRD) and for the rest of British Columbia. The total is the sum of the CSRD and other British Columbia.

Golden area mountain biking businesses, local and visitor mountain bikers spent a total of \$8.9 million in the 2023 season. In total, mountain biking in the Golden area accounted for \$3.55 million in GDP, \$2.28 in labour income and \$1.4 million in tax revenues. Just under half of taxes paid were federal (49%) while 44% was paid to the provincial government and the remaining 7% was paid to local governments. There were 46 jobs created by Golden area mountain biking industry. Wages and salaries paid to employees due to mountain biking in Golden totalled \$1.7 million.

2023 Mountain Biking Impacts ¹	Direct in Golden ²	Indirect & Induced in CSRD	TOTAL CSRD	Other British Columbia	TOTAL
Consumer Spending - Input (\$)	\$5,553,207	\$1,161,095	\$6,714,302	\$2,232,312	\$8,946,614
Domestic Output (\$)	\$3,691,991	\$919,796	\$4,611,787	\$1,711,945	\$6,323,733
GDP (\$)	\$2,004,961	\$691,596	\$2,624,557	\$927,989	\$3,552,546
Employment (jobs)	33	5	38	9	46
Labour Income (\$)	\$1,415,210	\$281,510	\$1,696,720	\$587,991	\$2,284,711
<i>Wages and Salaries³</i>	<i>\$1,163,730</i>	<i>\$186,087</i>	<i>\$1,349,817</i>	<i>\$367,411</i>	<i>\$1,717,228</i>
Taxes Total (\$)	\$1,012,771	\$157,572	\$1,170,343	\$229,651	\$1,399,994

¹ Includes direct, indirect and induced economic impacts in current dollars.

² Defined as the *Golden area* including the Town of Golden, Kicking Horse Mountain Resort and the surrounding areas on Highway 1 and 95 (to the south).

³ Wages and salaries paid is a portion of the total labour income.

We looked at the local versus visitors economic impacts in this section. It should be noted that some economists may argue that resident spend and associated impacts are, for lack of a better term, opportunistic and would be spent in some form or another if mountain biking was not available for spending this disposable income. As such, they may not qualify this as incremental economic impact. That said, we are interested in understanding the holistic economic impact of mountain biking in Golden which includes resident impact therefore it is included in this analysis.

The table below highlights the impacts of Residents and Visitors. We see that Residents account for approximately 47% of the provincial GDP created from Mountain Biking in the Golden area. Both sub-groups account for approximately \$700,000 in tax revenue related to mountain biking in Golden.

2023 Mountain Biking Impacts ¹	Residents	Visitors	TOTAL
Consumer Spending - Input (\$)	\$4,550,956	\$4,395,658	\$8,946,614
Domestic Output (\$)	\$2,892,822	\$3,430,911	\$6,323,733
GDP (\$)	\$1,677,448	\$1,875,098	\$3,552,546
Employment (jobs)	20.5	25.9	46.4
Labour Income (\$)	\$1,103,833	\$1,180,878	\$2,284,711
<i>Wages and Salaries²</i>	<i>\$848,067</i>	<i>\$869,162</i>	<i>\$1,717,228</i>
Taxes Total (\$)	\$700,572	\$699,422	\$1,399,994

¹ Includes direct, indirect and induced economic impacts in current dollars.

² Wages and salaries paid is a portion of the total labour income.

4. SUMMARY & CONCLUSIONS

4.1. Summary

The insights from this Mountain Bike study are summarized below:

- There were just under 7,400 riders during the 2023 season of which 23% were residents, 16% were day visitors and 61% were overnight visitors.
- Mountain Bikers tend to be younger, educated and more affluent.
- The largest source market is Alberta, locals and then the rest of BC.
- Mountain Bikers are arriving at trails in vehicles and parking in lots.
- They most commonly ride in groups of 2 and hit 4-5 trails during one ride.
- CBT Mainline appears to be the most popular trail network while the KHMR is also popular.
- Mountain bike support services and sales appear to be meeting the needs of bikers at this time.
- The GCC trail network is very highly rated with great successes with trail quality, maintenance and variety. Picnic areas and washroom facilities could be improved.
- KHMR ratings leave room for improvement. There appears to be some detractors, who are more likely to be locals, that are impacting the overall ratings.
- Golden has a strong NPS as a Mountain Bike destination.
- Direct expenditures related to Mountain Biking in Golden in 2023 equal approximately \$5.8 million.
- The economic impact of Mountain Biking is strong with Consumer Spending topping \$8.9 million and GDP of \$3.6 million. Tax revenues as a result of Mountain Biking in Golden should encourage elected officials to support this sector.

4.2. Conclusions

The main conclusions from this Economic Impact Study are summarized below:

1. Mountain Biking has a notable economic impact on Golden and its regional district therefore it should continue to be supported and potentially efforts could be made to expand Mountain Biking through increased marketing to attract mountain biking visitors.
2. Residents are the most frequent bikers therefore account for a large proportion of rides; however, only account for approximately one-quarter of riders.
3. Alberta is the largest single source market therefore marketing should reinforce this target group; however, efforts to develop other BC markets could prove beneficial. This is also true of efforts to convert day visitors to overnight visitors.
4. Mountain bikers are very satisfied with the trail network in Golden; however, perceptions of the Bike Park at Kicking Horse are lagging – especially for resident riders.
5. Bike Park upgrades would have a large impact on the marketability of Golden as a Mountain Biking destination. Similarly, expanding and promoting the Adaptive trails could give Golden a unique positioning.

6. Trail maintenance and development in the trail network are already high; however, continued efforts in these areas are key to long-term success.
7. Events, such as the Golden 24, boost the direct spend of mountain biking in the area as well as act as a marketing tool to promote the destination in general but also as a mountain biking destination. As such, increasing events may prove economically beneficial.

APPENDICES

Appendix A. Open-End Feedback

Appendix B. Details Of Economic Impacts

Appendix C. Golden24 Insights

Appendix D. Questionnaires

Appendix A. Open-End Feedback

Encouraging Donations to GCC

<i>An network of quality trails that are well maintained</i>
<i>Awareness of what the club is actively doing through signage at the trailheads.</i>
<i>beer or swag</i>
<i>Being on an email list in order to get information about trail conditions and general what is happening info</i>
<i>Better inclusivity for adaptive individuals and better inclusivity for groms. Help bring the next generation up, not best then down.</i>
<i>Buying a cool sticker</i>
<i>Continuing to improve the trails</i>
<i>Desire to help contribute to the quality of trails</i>
<i>Donation box</i>
<i>Ease of donation. Quality trails and maintenance</i>
<i>easy and accessible sign up or payment system</i>
<i>Easy donation process</i>
<i>Feeling obligated and reminded to do so, especially on trailforks</i>
<i>Frequency of my visits. If I ride in another area on a semi regular basis, I always pay for a membership.</i>
<i>Fun events, group rides, women-specific events and rides, free lessons on biking and trail building, tours through different trail systems</i>
<i>Fundraisers like silent auction</i>
<i>Gentle reminders on signage</i>
<i>I already donate because of the value I see GCC delivering to the community.</i>
<i>I am happy to donate to the GCC as I feel they put the riders experience as a priority in both trail design and maintenance, as well as building new trails.</i>
<i>I do occasionally donate. Squamish style reminder signs might be a good idea.</i>
<i>I have done so. The drop box is a handy way to do so.</i>
<i>I left \$10 in the box at trail head</i>
<i>I like to support local bike clubs</i>
<i>I typically donate to any local bike club where I travel to bike.</i>
<i>I usually donate if I have been using the trails a lot. Maybe having a QR code or something simple at trailheads would help remind me (please note there should be cell service there or else it's just frustrating)</i>
<i>I usually donate to whoever the local trail maintenance group is when I ride in an area. I can't remember the name of that group in Golden, but I recall making a donation last summer.</i>
<i>I would purchase bike clothing such as gloves, socks or jerseys to support a club</i>
<i>If i lived there or travelled there often</i>
<i>If I lived there.</i>
<i>If I was a frequent visitor. Easy to pay.</i>
<i>If in an area fulltime would certainly join local club</i>
<i>If it is easy to do so. Have a donation box at the brewery</i>
<i>If trail maintenance and new trail builds are advertised.</i>
<i>Interesting events that I'm willing to attend</i>
<i>Just ask like you do at the entrance. Explain the costs of maintenance, building etc. You should recommend an amount. We gave \$50 for the 4 days we biked. Not sure if that was enough or not.</i>
<i>Just learned about them this year — have to understand if they are the body that develops and maintains trails, then would consider.</i>
<i>Knowing the funds go back into the trails and club development. Maybe programs for kids?</i>
<i>More awareness of who is taking care of the trails in that particular system, don't be shy. I did donate, sorry about the US 20, LOL</i>
<i>More disposable income</i>

More good work
More money in my account? 😊
More mt 7 maintenance
My preference is to donate time as in volunteer work building and maintaining trails. I typically spend 300 to 400 hours a year working on my local (not Golden) trails.
Offering events for families to participate in and awesome trails.
quality of trails, presence of the bike club around where visitors are
Reminders of what they do, reminders they exist on trail maps etc..
Secure money box at trailheads
Signage at trails.
Social organized rides or tours
The GCC signs all over the golden trail networks do it for me: 'Diamonds are forever, berms are not'
To know more about it
To see exactly where the money goes and how it'll improve/maintain the trails.
Trail expansion.
trail maintenance
Trailforks makes it really easy to submit donations to trail crews in the areas I have ridden.
understanding more about it
using the trails and being satisfied with the signs and upkeep of the trails
We always donate to the club because the trails are awesome.
We join GCC to support the trail network
Well maintained trails and lots of availability of donation boxes.

How to Improve Mountain Biking in Golden

- More blue to blue/black options down from top of Mt 7 - Climbing option/ more trails linking up to LSD - More weekly group rides for different skill levels
1. Advocate for the rights/considerations of mountain bikers against RSTBC and the logging industry. We don't get new trails approved, and the ones we have get logged. We need the cycling club to stand up for the countless hours this community has put into Golden. 2. Build new trails that are challenging and technical. We have way more than the national average of green and blue trails. Build interesting, challenging trails for advanced riders. I leave Golden every summer to ride where I can be challenged by technical trails and well built jumps.
A bit more variety and more signage on mount 7
A couple of basic bike repair stations and no bears
A cycling route on the bench lands south of town to connect horse creek to mountain shadows either for commuting or recreation
A few more trails that allow for recovery from uphill grind.
A well maintained shuttle road up Mt 7 is always appreciated but not sure that falls under the GCC.
accessible alpine trails
Add even more features to the skills park. It's amazing as is but it would be great to have even more options for skill building.
Add more intermediate trails like 3K ('Black blue trails)
Add rec sites into more of the trail systems
Additional trail variety on Mount 7!
Advocate for mosquito control or winter grooming in the Moonrakers
Alpine trails, Improve current trails with upgrades, way easier than new trails. Great club!!!
Alpine Trial
Although maintenance is pretty good on the trails, I have seen decline in tread quality from heavy use . If we are going to welcome the world to our great biking, tread maintenance is necessary to avoid rutted trails. The drain dips and water bars need work, probably twice a season, on certain trails. Brushing and tree clearing is done well.
As of right now and everything I know, nothing!
Assess trails according to recognized grading standards used in other trail systems/areas. Keep trail features aligned with the provided grading.
At least a little more focus on more advanced trails that challenge the experienced rider. We have enough beginner, family and kid friendly trails.
Awareness
ban strava people who change the trails to boost their alpha male egos and strava times.
Better berms. The berms seem to cut off half way through. Mote sanctioned trails. There are a lot of trails not on the maps (like Teenage Dirtbag) that would be fun to explore, but I don't always want to have someone show me these trails I see braiding off of main trails
Better Club merchandise.
Better communicate trail rules & etiquette especially with e-bike proliferation creating potential conflicts re: up hill riders, and passing.
Better designed climbing trails for doing all day laps- example is Cumberland Sobo no Micha. I'm not sure if it's the grade or what but a few other towns the climbs up are long and steady but not fatiguing and can do all day laps. Here it just kills you unless you are a die hard every day rider and not a leisure athlete. This is usually the reason I have to travel to ride with friends from out of town, they all hate the climbs here so won't come.
Better inclusivity, more from level rides, better instructing, and a continued development of better trails and accessibility to said trails.
Better information on All-Trails.
Better maintain trails. The club does an awesome job brushing and clearing debris, but doesn't do a good of a job of repairing berms, holes, braking bumps, or erosion. It seems like once the trails are built, they're mostly all left to degrade.
Better Mountain Shadows area access for green level riders. Up track to power line should not have been designed to be a filter.
better signage at trail junctions... some are a bit ambiguous
Better signage for donations.
Better signage on Mt7 and mountain shadows
better trail maintenance
Better trail maintenance in regards to roots, corners, bump tracks and all on most trails in area. Would like maintenance to take one trail and focused on it until most problems are solved instead of doing bits and pieces that are not easily noticeable
Better trail maps at junctions on the cross country trail network
Bike repair stands and pumps throughout the area, continue building networks

Summer 2023 – Golden Mountain Biking Economic Impact

<i>Black machine built jump line on Mt 7. I do enjoy and ride the steep and loose trails on Mt 7 but I would really enjoy some more variety such as flow trails and more moderate tech trails. (Fast tech including tech gardens instead of having to carefully ride down something real steep). Organized shuttle events?</i>
<i>Brush cut the sides of more trails</i>
<i>Build an alpine trail.</i>
<i>Build more advance trails. Continuing to build lackluster blue trails isn't needed.</i>
<i>Build more black, technical, hand made trails outside of Mt7 area. There is enough blue manicure trails in our network.</i>
<i>Build more cross country trails</i>
<i>Build more green and blue flow trails.</i>
<i>Build more jump trails</i>
<i>Build more sanctioned black trails. Everything has been 'dumbed down' all over the province and forcing pirate trails to be built. Own the fact that Golden is raw and gnarly, there's plenty of blue and green trails around.</i>
<i>Build more trails!!!! Always more trails !!!!!</i>
<i>Build more trails. Hire a larger trail crew that works for a longer period of time. Lobby KHMR to be open later in the day so you could ride after work while the sun shines until 1045pm.</i>
<i>Build real jumps, drops, gaps. Get someone who really know how to build them to work on them. Best jumps in town are all on rogue trails...</i>
<i>built more trails and eliminate use of trails by ebikes</i>
<i>Can't really think of anything. Keep up the good work. Golden mountain, biking rocks.</i>
<i>Cant think of anything</i>
<i>Can't think of anything</i>
<i>Can't think of anything right at the moment.</i>
<i>Cheaper accommodations so I might stay for more than just a day next time.</i>
<i>Communicate, but that is not a problem peculiar to GCC.</i>
<i>Connect the resort to the cedar lake elevation to the north of the KH road.</i>
<i>Continue kicking butt and doing what they're doing!! Love to see more trials built in near future to expand mount shadows area.</i>
<i>continue the great work!</i>
<i>Continue the motivation with chasing grants and advocating provincial and local government to support the groups goals</i>
<i>Continue to expand the trail network for all levels of riders</i>
<i>Continue to maintain and expand the network. Build it and they will come.</i>
<i>Continue to maintain and upgrade the existing network of trails. Continue to support events and youth training/bike camps. Develop some longer-distance XC trails. For example, a loop between Nicholson and Parson.</i>
<i>Continue to work on increasing number of trails available to ride. As I ride every day, is nice to have variety.</i>
<i>Continue trail maintenance. I would like to see more old trails rebuilt. I would also like to see way more wood work added to the networks.</i>
<i>Continue trail network expansion</i>
<i>Control the extent of the trail network to ensure that it gives space to wildlife to be undisturbed from trails so it's not focusing on more, new trails but on maintaining quality network that is already there. And if you're building a trail, do it right beside where another one is so it doesn't encroach into wild space for wildlife. Also, I am concerned about the alpine biking around Golden; especially with helicopters. it's not environmentally friendly at all. It's tough on the landscape that doesn't recover and it's hard on the wildlife like mountain goats. Thanks for listening.</i>
<i>Create easier access to pedal up on to a nice big jump line not like premature bigger jumps then that</i>
<i>Create more black/double black trails</i>
<i>Create more new trail and well design</i>
<i>Definitely needs to be more beginner level trails - even for a low intermediate rider there isn't much variety and definitely nothing for tourists by way of easy riding.</i>
<i>Develop big alpine rides similar to Frisbee Ridge in Revelstoke</i>
<i>Develop bike trails on the North Bench, Golden Donald Upper Rd area.</i>
<i>Develop more experienced beginner trails. More than green adaptive with features but not blue difficult. Transition for kids & adults learning moving from adaptive trails to blue difficult is extreme. Nice to have a few longer mid /beginner experienced trails for all developing skills and family rising (CBT area, Moonrakers and Mtn 7 areas</i>
<i>Development of a sanctioned alpine trail</i>
<i>Don't allow our trails to get logged so they look like war zones</i>
<i>Epic alpine trail</i>

Summer 2023 – Golden Mountain Biking Economic Impact

<i>Establish groomed fat bike trails at Dawn Mountain Nordic centre. Many other areas have shown fat biking and Nordic skiing can coexist. The terrain and snow around the Dawn Mountain is better suited than Mountain Shadows for fat biking. The cycling club and Nordic centre could have a season pass for fat biking.</i>
<i>Even more trails</i>
<i>Events. Specifically related to inclusivity for all skill levels. More furious 5s but more variability to include beginner to intermediate race courses.</i>
<i>Expand kids bush part type trails to have that area to teach kids</i>
<i>Expand the trail system to the south of mt7 to Horse Creek and improve access as to avoid hwy 95</i>
<i>Extended kids camps, like weekly afternoon camps throughout the season. The spring camps are great and could be extended. Lobby RCR to better maintain the park. It could be a great asset for the area but lack of trail variety and almost complete lack of maintenance makes for a mediocre experience. Won't renew my pass next season since I didn't enjoy it much anymore this year. Also, RCR should do at least one weekday with longer hours so locals can bike after work. I know this wouldn't add a single sale for them but might keep some of us as customers instead of opting out.</i>
<i>F5 and thanks giviner are great! It would be nice to have a few more community events and group rides for both ends of the skill/terrain spectrum throughout the season. This might help people feel more welcome to participate in club activities.</i>
<i>Fewer people</i>
<i>Fix the trails when they start getting rough. ie adaptive and betminator</i>
<i>Flowing jump trails like SunPeaks or silver star</i>
<i>Focus on trail variety and specificity within the individual trail networks - There is too much importance placed on making new trails that appeal to everyone. Paradoxically this only leads to trails that appeal to nobody with a lack of variety that would otherwise distinguish trails within a given network. Each network achieves variety from each other as a whole, but the trails are almost too similar within each network. Maybe consider hiring outside talent to build or rework trails instead of using the same company every single time.</i>
<i>Full services at the cedar Lake camp ground. (Showers and laundry)</i>
<i>GCC is doing a great job. Only thing to add would be to increase the inventory of trails.</i>
<i>Get a better bike</i>
<i>get better dirt like the stuff from whistler ;)</i>
<i>Great as it is</i>
<i>Great job generally. Beginner/blue line jumps at new skills park are not great for beginners. A tweak there would be greatly appreciated. Especially as a coach. Trail maintenance at the bike park desperately needed, although that was improved this year and Super Berm is running great. Opening times at bike park are dismal. I've spoken to many locals who would appreciate at least 1 late evening for locals. Great job on the fat bike groomers, hope that continues this year. All great progress overall!</i>
<i>Greater variety of trails. More black tech.</i>
<i>Hire a group that actually knows how to build jump trails. The reason every other town does so much better is because jump trails bring visitors. Also berms are terrible here</i>
<i>Honestly not much. Everything is pretty awesome.</i>
<i>Honestly, I can't think of anything. Gcc does an amazing job</i>
<i>I can't think of anything. I love riding in Golden. I think the trail network is fantastic. It would be cool to develop some high elevation/alpine trail systems but I think that might be hard to find/do. Maybe in Glenogle and then over towards the Blaeberry and down into Redburn. That would be a big ride.</i>
<i>I don't know</i>
<i>I love the signage and how many trails we have! Thanks for everything</i>
<i>I mostly use the trails for running so I've answered the question about how often I used the trails referring to running not biking. I answered the rest of the questions about biking, which I don't do much. Modernize some older trails</i>
<i>I think more adaptive trail would be good and maintenance of older trails if possible. Education around minimizing your environmental impacts would be great. Discouraging building of unsanctioned trails.</i>
<i>I think the GCC does a very good job, but it would be nice to have more funding and trails built. I have personally donated to getting the new Scali built to have a bit more variety</i>
<i>I think they are doing a great job, would be great to have funding certainty for trail maintenance. Very impressed with the work done and support for biking in Golden</i>
<i>I think they should keep expanding and improving the trails. The trails have consistently improved since I've been a member for the last 8 years</i>
<i>I Think they should organize group rides</i>
<i>I was generally very satisfied</i>
<i>i would like to contribute and participate more but it seems like many events are held during week days which makes us weekend warriors unable to do so.</i>
<i>I would like to see a Mt 7 shuttle service. This could be an interesting small business for summer students... of course I would like more trails but everyone would. To be specific it would be nice to have another option on Mt 7 instead of riding 5Km down. That trail is getting absolutely worked especially when it gets dry.</i>
<i>I'd like to see more technical trails and jump trails.</i>
<i>I'm an intermediate rider and find the trails really interesting and varied, however i hear from others that Golden needs more variety in black and jump trails</i>
<i>I'm not entirely sure. They do a very good job from what I can tell.</i>

Summer 2023 – Golden Mountain Biking Economic Impact

<i>I'm not sure if it's even possible to do anything because of how steep the trails are, but trail maintenance (improve water channeling and drainage?) to reduce the rain ruts on Skid Marks would have improved my experience.</i>
<i>Improve maintenance on single-track downhill trails.</i>
<i>Improve on trail variety. Professionally built features. Jump trail with blue/black options</i>
<i>improve trails.</i>
<i>Increased trail variety. More technical XC</i>
<i>It's pretty good as it is. Loving the cross country trails and as someone that got injured before moving here and got a chance to get back on my bike in Golden's trail, I was happy with the variety from adaptative trail, to cross country and more challenging one. Good to gain back confidence !</i>
<i>Just continue what they have been doing, building new trails and keeping the trails about biking not politics.</i>
<i>Keep adding great trails!</i>
<i>Keep building more trails.</i>
<i>Keep doing what you're doing!</i>
<i>Keep it as a 24 race.</i>
<i>Keep it up. Keep adding new trails or connectors when possible.</i>
<i>Keep logging off the developed trails.</i>
<i>Keep on building and expanding the trail network</i>
<i>Keep the psychosis race track in its original flavor and continue to add more trails elsewhere on Mt7. Jumps can be added anywhere on the mountain but leave the legendary race course as a race course. Would be nice to see dead dog get a bit of love. Would be great to have some signage and maps of the newest trails.</i>
<i>Keep trails maintained and continue to build new trails</i>
<i>Keep up the great work!</i>
<i>Keep up the trails and make sure there are all levels (including beginners and intermediate trails) that are well marked</i>
<i>less blue flow, more tech trails. work on increasing trail QUALITY over Quantity</i>
<i>Less mosquitoes</i>
<i>Limit e-bike access trails</i>
<i>Lobby harder to get more difficult features and/or trails built in Golden. The club has a tendency to limit itself by assuming it knows how the govt, insurers, users will react to something and therefore many things don't get done.</i>
<i>Lobby harder to minimize logging the trail networks. Logging is the #1 reason I no longer ride certain trails...the aesthetic is gone.</i>
<i>Local shuttle services would be phenomenal but not necessarily a GCC issue.</i>
<i>Maintain trails and build better/more intermediate features.</i>
<i>Maintaining 5k</i>
<i>Maintenance and development of the Mt 7 trail network. If only one is possible than maintenance.</i>
<i>Make an alternative to take it easy and most options on the lower mount 7 so you don't have to ride 3k all the time</i>
<i>Make even more blue trails!</i>
<i>Make sure trail network is Maintained.</i>
<i>Marquee trails to attract riders from other destinations - ie an A-line type jump trail or a Frisbee ridge style alpine trail - to make Golden stand out more</i>
<i>Maybe a shuttle for mt7 other than that it's great</i>
<i>Men's lessons / clinic Kids and Ladies seem well served but in my experience men are at the mercy of their friends good graces 'riding down' and offering advice when it comes to skills development.</i>
<i>minor point but the maps designate trails by number (with the names shown separately) whereas the trail signs just use the name. May be better going forward to add trail number to the sign as well the name.</i>
<i>More alpine access</i>
<i>More alpine trails</i>
<i>More and better built jumps. The hyomuptera 'repairs' made the jumps dangerous and unrideable</i>
<i>More beginner and intermediate trails. Better trail maintenance.</i>
<i>More beginner friendly trails</i>
<i>more black diamond trails in the mountain shadows and CBT areas.</i>
<i>More black sanctioned trails</i>
<i>More black trails with black jumps and other features</i>

Summer 2023 – Golden Mountain Biking Economic Impact

More black trails, bigger and longer jump trails, below 3k on mount 7 trail zone could have a few black trails to offer. Bring back toonie racing on Mt7 A bike show and shine style event Kids races More learn to ride events More black trails
More Black, Double Trails that are sanction (we mainly have blue trails on the map) Jumps trail that is build by a professional company that specialize in jumps One Green Trail
More black/double black flow and tech trails. New trails are always fun.
More blue runs or slightly wider trail for the blue runs.
More communal group rides for different level of skill
More comprehensive trail signing, similar to the signing in Prescott Arizona. At those trails, the signing was so good, Trail Forks wasn't needed. Washroom facilities at Refection Lake need improvement. Add more tool facilities at all trailheads, the one at Moonraker is an awesome idea.
More dark blue/black trails that aren't mount 7 fall line
More descending blue flow trails
More direct funding for volunteer trail builders while maintaining trails that are under the GCC umbrella, or while helping develop a new network under the GCC
More easy trails.
More easy trails.
More easy trails. Trail maps in situ, labeling on trail junctions.
More events that serve more then hotdogs. More trails getting approved. Being able to have signage at every intersections so that every trail doesn't end up with 2 names
More family friendly events
More family friendly trails. More blue trails
More flow style down tracks to complement all the up track (especially on CBT side).
More flow, more mount 7 dh, more connection trails to Nicholson, north bench, etc..... groomed fat bike trails for jogging with dogs.
More flowy down trails on the CBT side
More flowy trails, less braking required, trail speed features
More green flow trails,
More green trails. Assuring that there are not too many people in the trails at the same time.
More group ride options
More group rides
More intermediate options from top of mt 7
More lessons and tours
More long + sustained flow + berms!
More machine built trails
More maintenance on existing trails and we'll built flow/jump trails for all levels.
More mount 7 maintenance
More new trails created. There hasn't been any new trails for a few years now.
More progressive black to DB jumps. Re touch old trails, trail improvements and alternate features/lines. Using old blue trails and adding off shoots to black features. Wood work!
More properly built machine jump flow trails designed and built by people with a proven track record in building these types of trails. Sun Peaks, Whistler, Silver Star style. The ski hill needs to develop the lower mountain with more flow and jump lines that have an actual trail speed and jumps that work. The Catamont needs to be replaced with a detachable high speed chair. Bigger jumps, better built and designed by pros would be the theme
More shade at trailhead.. Recommendations how to link up trails
More signage
More tech trails on the moonraker side
more trail features, jumps and drops
More trail maintenance and upgrading, and additions of trails of the Mount 7 network. More technical riding options on CBT area.
More trail maintenance.
More trail signs.
More trail variety
More trail variety at blue level on hill. So many families out now on the hill! If one run closes ie super berm it really limits variety available for the day.
more trails
More trails maybe? But I'm generally pretty happy with Golden as a mountain biking area

More trails off mt 7
More trails on lower CBT area.
More trails on mt 7
More trails similar to Premature, especially from the top of mount 7. Schacher takes a long time to get down and is more of a climb trail. The beginning of Summit is really rutted out and bumpy and just doesn't feel great
More trails to come please!
More trails! More features on boring trails.
More trails, less 24hr races
more trails, more signage, more washrooms
More trails, more variety of trails
More trails, put a bigger emphasis on out of town riders contributing to the cost of trails maintenance, more kid programs
More trails. It would be awesome to have some more kid friendly trails (for ages 6-12) that are accessible without a vehicle. Expanding the adaptive trail network would also be nice, Revelstoke has a great adaptive network. And more blue and black trails in general. New trails are always fun. Overall I think the club does a great job and the riding here is excellent.
More variety in trail design
More variety of blue trails with blue features - the skills park is a nice place to practice progressive drops, etc. but there aren't a lot of progressive features on trail. There are large jumps/drops with uneventful ride arounds to avoid the features. It would be nice to have medium size technical trail features instead of just green to black or ride around. I've ridden trails in other towns where the trail splits (a black side and a blue side) and re-joins and the blue side is still fun with blue features so you still feel like you're having a good ride instead of just dodging all the black features to ride the in-between bits.
more variety of trails (number of trails, flow and tech, blue and black levels)
More variety of TTFs. Variety of drops, woodwork, natural features, and skinnies that are progressive and not just built for advanced riders. Most trails I've been on are flow (which is fun) so it would be nice to add some trails with various woodwork and technical sections. Or maybe I just haven't found those trails yet!
More winter fat bike grooming
More/Longer Jump Trails with progression in mind.
mosquito control, keep dev/building new trails, keep up with the fabulous maintenance.
Mtn 7 shuttle services
Much more attention given to where important ecological and sensitive wildlife habitat values are located on the landscape. Not only paying attention to economic and social values. Encouraging people to stay out of areas where there have been sightings of grizzly bears and black bear moms with cubs. Also, promote the ecological values to wildlife of leaving your off leash dog at home while biking. Off leash dogs are a danger to humans on the trail and also to sensitive wildlife. I nearly got knocked off my bike last week by an off leash dogs while going down Chute The Duck.
Nicholson connector, so people don't have to cycle on the highway
No idea to provide.
No more bugs
Not a lot of new trails but more dark blue trails or adding more features to existing trails.
Not much, it was awesome!
Not much. A shuttle service maybe for Mt 7?
Not sure
Not sure really like all the trails I have ridden and they are well maintained
Nothing I can think of at this point. Enjoying the trails and quality of trails.
Nothing I can think of at this time
Nothing I can think of- we're pretty independent bikers
Nothing really. It's pretty good
Nothing, very happy
Nothing. It's perfect as it is
Nothing. Just keep on the maintenance and making new trails.
Offer lessons at Keith King bike park.
Offer lessons for different skill levels.
Offering more kid-friendly options and signage for those options.
Online trail maps
Open a couple low maintenance black technical trails. Blue flow trails are fun but take too much effort to maintain constantly.

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Organize more easy bike events for beginners and children. Organize a night race/event to compensate for the loss of the night section of Golden 24. But great job this year!!
Overall I think this is a great trail network. I would like to see a bit more of the more wider and open runs like the adaptive trails to encourage more beginners to enjoy the trails or get into the sport.
Potentially, a few more blue, 'flowy' trails.
Provide more features on the trails. Have organized rides according to level of riders. Have different themed nights of things to work on with experienced riders
Put more effort into better understanding the effects of mountain biking on wildlife and the environment and strongly discourage mountain biking in sensitive alpine environments.
put washrooms at the extent of each trail network (out by rock about, canyon creek etc). Doing a pretty awesome job otherwise!
Putting the number on the trail posts it's easier to remember the number than the name of the trail for new comers
Reduce rogue trail building
Regular group rides and shuttles
Regular shuttle up Mt7
Remove the sticks/logs and debris from the sides of the trails. Will make the trails more aesthetically pleasing and safer.
Repair woodwork in mookrakers CBT and while we are at it rebuild some more of the old stunts in mountain Shadows
Resist the urge to overly groom the single track of roots and rocks during maintenance/rebuilds.
Safe route on the highway from Nicholson to Golden.
Seriously, can't think of anything beyond what they already do.
Shuttle service at mount 7, a little further development/ refinement of the skills park
Signage is somewhat confusing if you don't know where you are.. the arrows are pointing in directions you don't know which way to go. Also the new bike jump park is awesome but it doesn't look good .. are there plans to make it look less deserted and more approachable?
Signage was poor on local trails. In the little I saw of them.
simple communication as to what is happening would be amazing
Some more black rated trails. Would especially love to see a black flow jump line on Mt 7. We have a lot of great blue flow and gnarly steep janky trails but we don't have much in between.
Star ratings on quality of trails. As a new rider, I don't know whether some trails are generally rutted out, etc. Having star ratings on trails (like a climb, for example!) would be amazing.
Stop building rogue trails (yes, the executive members of GCC do this) Build approved and designed trails Stop putting big jumps in blue connect trails (summit connector) Put jumps where they belong (not before sharp turns, visibility, etc) KHMR crew should visit Whistler and Revelstoke for some tutorials Show all trails on the map (like why is red wine marked with stop signs on schacher but not shown anywhere)
Stop 'dumbing down' some of the trail features / trail obstacles.
Straighter bridges with straight and smooth entry in both directions, for safety. I don't like a turning entry or a bump or rock that can make a rider wobble over the bridge.
Summer bike camps for kids or more weekly after school kids groups. Build more moderate grade climbing trails. Our climbing trails are so steep compared to other areas (ex reflection lake climb is brutal) see nelson, valemount, nakusp, red MTN climbing trails
Taking a few gnarled heavy roots out of the paths that are for more intermediate riders. One on 7-up (first turn to the right) and 2 on Selkirk Slackers, the main one being located past the bridge structure just before the short climb. Thanks!!
The downhill trails aren't great for beginner riders and the chair lift for the bottom half of the mountain is slow and hard to get bikes on.
The events are great! Keep up the great trail maintenance. Maybe you'll get to build a black trail eventually
The events they held this summer (furious 5 etc) were very fun and would love to see more community building like that. Maybe regular group rides for different abilities
The gcc is doing a great job
The Mount 7 trails are not well sign listed or mapped on the network so improve maps on trails and signage. Shuttle up mount 7 be great
The only thing that I felt could be better is some trails for my youngest daughter to ride on and develop her skills. She really enjoys the adaptive trails, bush party/woodlot but seems to be a bit of a gap in skill level required to step up to other trails from there. I don't know there is a reasonable solution to this as it is only a phase in her development.
There are a lot of trails to choose from. It's hard to know where to start. Trailforks is only so useful for this. It might be helpful to put together some route suggestions based on ride time and level of difficulty. Indicate where to park for each ride.
There is nothing I would change about GCC's job of the trails and services. 10/10. Keep doing what you are doing!
Trail maintenance on Mt 7
Trail variety and development. Without the rogue trail building, Golden's trail variety is sorely lacking. Classic mt7 lines need updates. A black jump trail is required. Steep, technical trails built with the natural terrain are needed.
Unfolded, wall mountable bike maps. A small thing, but cool to have. Generally very satisfied with what the GCC is and offers. I'm embarrassed to say, I'm not a member but will next season.
Unsure
Unsure

Unsure
Up track at KH resort.
Update the map at CBT parking lot
update the maps in the parking lot kiosks
Uptracks for all abilities like many other town bike associations in BC have built, e.g. Nakusp, Cumberland, Valemount. Also a shuttle service like they have in valemount would be fantastic
Water dishes for pups
We live in Golden part time so are not as familiar with trails as the locals. Would prefer more signage on unmarked intersecting trails. Would also enjoy a 'seniors' aspect to the club for group rides and lessons. But really, I'm extremely happy with everything the club is doing and the quality of all the trails!
We need more trails like the adaptive trails. I'm not necessarily saying they need to be designed to accommodate adaptive bikes, but more that we need more smooth, mellow, flowy trails with berms and rollers, but without jumps (or a nice way around the jumps).
When building new trail please contract the work out, to out of region builders. It's time we get some trail variety from build to build, get some new, creative blood into the area. I love to see things kept local but it's just not cutting it.
When building new trails in the area, please consider the use for families and children. Some of our up tracks are far to difficult for general use and they should not be just for elite riders. Every area should be accessible (uphill) for all riders. Downhill can have various degrees of difficulty from green runs to double black.
When building new trails to hire companies that are based from out of area. (Get variety in our riding) All trails are almost great and don't seem thought out.
Wintergroom for fat biking in the Moonrakers including the Scallimag Trail. Scallimag has been a fantastic addition to the network for those riding from the resort and always has lots of traffic on it. Also, would like to see more adaptive trails which are fun for families and beginners also (and for winter cycling)
Work on more green trails. There isn't much available to beginners. Maybe some progressive suggestions for what blue trails to try first after green? (Marking the easier blues)
Workshops and skills courses more often
Would be nice to know / find the newer trails on mount 7
You guys rock! Don't stop! More party!

General Comments/Recommendations

1) Keep up the momentum. 2) A few more trail maintenance/day use donation boxes or locations. 3) Better advertisement of the importance of day use fees or GCC membership.
1. Put more resources into supporting the rogue trail builders in the valley. Rogue trails account for 95% of the new trails being built, and 100% of the quality trails being built. If the cycling club can't get new trails built/approved, then work with the community to protect and maintain our unsanctioned trails. This is the approach Squamish takes with it's network. 2. Hire a new ED that is a passionate, skilled mountain biker, not someone who is doing the role just because. 3. Send your new ED to successful clubs around BC to learn from what they are doing, and how we can apply their learning to our town.
Accessibility of the network from town is the best feature we have. I would like to see more black trail being build outside of Mt7. I think we are lacking varieties of trails within the sub-network.
Alpine epic access possibility (with an educational component so people can be respectful and conscientious alpine rider). End of season GC2 wind up day. About 5 years ago there was a fantastic end-of-season wrap up by the club: group rides, kids rides and events, a small poker ride, chainless DH. Was super fun and had something for everyone. Burgs, beer and dogs etc at end of it all. Would be a great community builder in the fall. Occasional trail maintenance days actually during the day. The odd Sat a.m. from 9-1. In the past this always got a huge turn-out. Though the current Wed work parties are much appreciated and excellent...not everyone can attend at that time.
Amazing work making golden affordable to bike when everything around us seems to be going through the roof. My family appreciates this
An epic Alpine Trail like Revy or Rossland would be a huge driver of more out of town tourists to the area. Would put Golden more on the map for mountain biking in BC and North America
Another climb trail from the bottom of mighty Quinn would be amazing. Aswell as a few more trails on the CBT side. Could be an interesting network if done correctly
Appreciate all the work you guys do! You're doing a great job. And appreciate being given a survey to put in our two cents. Cheers!!
As an outsider I wasn't aware of the trail network around Golden (not sure if that's a good or bad thing for you!!)
As important as new trail building is, it can sometimes feel like the trails we already have could use the love and attention to keep them riding smooth. Example: Mighty Quinn gets rutted and beat up so quickly and doesn't seem to get smoothed out again until the next season (to have a very short window of smooth riding before getting destroyed again). There aren't really other flowy trails to ride once its blown out.
At times a separation of social cycling club and trail society look like a better option
Be more inclusive of all riding levels when building trails!
Beautiful place to live to build trail , maybe a few more man made features but nature is rad too
Big shout out to trail crew! Absolutely amazing people!
Can't think of any.
Easier pedal up trail to top of mount 7 and shuttle service for mount 7
Excellent communication
Expect everyone to pay to use trails!
Fantastic job! We live biking in Golden.
Fat Bike Festivals are gaining in popularity and attendance. Good thing to keep in mind. I'd be happy to volunteer.
For some reason. some trials do not show on my GPS? not on Trial Forks. Twisted Sister is one.
Funding allotment for supporting volunteers. In preparation for psychosis 2024, there is already a lot of volunteer work that is happening and will continue in Spring to bring the race line to life. Not to mention work after the race. Some race proceeds should be put towards support. This does not need to be paid for time (I understand the issues that come with this, though this would be ideal). But it could look like reimbursing expenses. Replacement tools, nails, sandbags, or gas reimbursement for driving up 7. I support the building of new trails, but as the network and number of riders expand, we need to also think about how we are organizing maintenance in the network. The state of Dead Dog and the race line since Crankworx is a testament to that.
Generally the GCC is doing a great job.
Good job with the skills park
Good job!
Good survey!
Great Club!!! Awesome job !!! Thank-you !!!
Great community! I think the bike park is lacking in quality (not part of GCC's work?). Still lots of opportunity for trail expansions on Mt 7 and other FSR's. Could GCC perhaps start legalizing and maintaining some of the pirate trails on Mt 7? There's a lot of great trails that could be revived with not a huge amount of effort (wires, slippery kitty, black's)
Great job by club the trails are much appreciated
Great job Congratulations!
Great job with the trails. We're so lucky!!
Great job with trail upkeep and maintenance - it's a thankless job.
Great job!
Great job!

<i>Great that you are encouraging network</i>
<i>Great work by the club in general!</i>
<i>Great work!</i>
<i>Great work, much appreciated</i>
<i>Great work. Some of the best trails any where</i>
<i>Host events in the summer time.</i>
<i>I am personally very impressed with the variety of trails, maintenance and overall service the Golden Cycling club provides.</i>
<i>I don't like how the bike club backs down when dealing with certain groups. I'm still upset we had to redo the end of Mighty Quinn/Goldrush because of the owners of Alpine Meadow Lodge. Mountain biking brings in a lot of \$ into the community and we should push back when 'staple' trails are affected. I'd love a shuttle service option for Mt 7 Overall the mountain biking in Golden has evolved and vastly improved over the last 10 years. I'm super happy to live here for the biking. There are very few places that you can bike from your house and access amazing trails. I'd like to give a shout out to Rich and Julie for their work on Mt 7.</i>
<i>I have many thoughts but do not know enough to provide accurate comments.</i>
<i>I liked the jerseys you sold this year</i>
<i>I love riding in Golden</i>
<i>I love to pedal. but I want to pedal to go down, not across. Riding in golden could be very similar to Cumberland and Cumberland has all style of trails and harder blues.</i>
<i>I mostly did laps on the Adaptive trail this year, as I'm getting older and less adventurous.</i>
<i>I pay my dues every year and bike minimally now but use the trails for trail running and appreciate the upkeep.</i>
<i>I personally think the golden cycling club has done a wonderful job. Supporting and appreciating their volunteers in all areas, from race event s to maintenance. Local businesses are also very supportive and involved with donations, event prizes and many other services.</i>
<i>I think there could be done more regarding corporate sponsorships. The packages for this year weren't super attractive. Ask corporations to sponsor a specific trail instead of the club. Continue to do the small race events.</i>
<i>I would like to see better parking areas and amenities like a bike washing stand and flush toilets. better unto date signage as well.</i>
<i>I would like to see mandatory snowshoe wearing on groomed fat bike trails.</i>
<i>I would love a connector trail from the end of Quentin's to the middle section of premature</i>
<i>i would love more advance notice for community biking events so that i could attend more. last minute is tough for my family.</i>
<i>I would love to see bike demo days hosted in Golden</i>
<i>I would love to see more progressive learning lessons for teenagers to progress at the park, dirt jumps, general xc, enduro and downhill. Perhaps some camps tailored to those that can ride quite well but still looking to improve</i>
<i>I'd love to see more existing trails maintained and upgrade to have multiple line options for profession, with proper signage for how hard the feature is. For example, I love the replaced woodwork on Magic Dragon. It could use signage for the features, and there's many more trips that could use multiple lines and features like that.</i>
<i>I'm happy with all work GCC has and is doing.....but QUIT SUGGESTING IN GCC MAP/ BROCHURE FOR RIDERS TO STOP AND HAVE SWIM AT CEDAR 2.....SADLY LOCAL SWIMMING AREA NOT LOCAL ANYMORE!!!</i>
<i>It would be cool to know about behind the scenes GCC efforts.</i>
<i>Keep building new trails</i>
<i>Keep offering the kids Mountain Bike Camp in the spring!</i>
<i>Keep on rockin it guys!</i>
<i>Keep the trail crew working through the summer please</i>
<i>Keep up the good work</i>
<i>Keep up the good work</i>
<i>Keep up the good work</i>
<i>Keep up the good work</i>
<i>Keep up the good work it's been awesome riding in Golden !</i>
<i>Keep up the good work!</i>
<i>Keep up the good work.</i>
<i>Keep up the great work</i>
<i>Keep up the great work!</i>
<i>Keep up the great work!</i>

Keep up the great work! Really enjoy biking in Golden
keep up the great work, from your fellow Blackwater Bicycle Association member in West Virginia.
Keep up the terrific work!
Less of a 'old boys club' in the cycling club change is a good thing
Let's keep mountain biking tourism growing, more people riding here and coming to events will help with the town income in many facets.
Love the community's attitude about mountain biking and the importance to the community. We come from a community just down the road (Invermere) where the community seems more interested in reducing the number of trails available to mountain bikers.
Love the trails and prompt clean up when trees are down. Would love to have clinics and group rides for intermediate riders - sometimes it seems there are only group rides for the elite riders
Love the trails. Love the fiver series. Could probably change the xc race next year due to low attendance but otherwise I'm stoked to ride everyday and race as much as possible
Make sure you keep the signage updated. Especially when you are new to the area, the great signage helped a lot!
Make the XC race a mass start instead of time trials
Make tour operators pay for trail use
Maybe have a few more lodging specific for mountain bikers for ease of SUPER SECURELY storing, repairing, cleaning our bikes.
More adaptive trails would be great or beginner kids trails.
More black trails
more green trails would be nice for beginners
More knowledgeable and bigger progressive trail crew.
More mt 7 maintenance
More push for new DH specific trails
More trails are always my number one suggestion
Need to get on the winter grooming for fat biking
No, great work and thanks for all that you do.
No, keep up the great work
No. You are doing great. Love everything about GCC.
No..just thanks and keep doing what you are doing!!!
None really, I would know more if I lived in golden and did more than KHMR
Nope, keep doing the great work you're doing!
Not at the moment
Not really. If available I would wonder if a trail host, similar to ski host, would be useful just to give some 1st time riders to Golden the lay of the land
One of the people that does regular trail maintenance on the CBT trail likes to dig holes on the side of the trail. I'm guessing to drain water that might collect after a rain. As much as I appreciate the work he's doing, if someone could tell him to stop with that BS already would be good.
Overall happy and think they are doing a great job.
Please share the race courses sooner. I would like to know what the trails are to see if I'm Interested in participating
Psychosis is possibly the best race track in the world. Very little needs to be done other than preserve it.
Race series and engagement of the community are great initiatives to maintain going forward, well done!
Really appreciate all your efforts.
Really enjoy the trails and all the hard work & dedication provided by the volunteer teams!
Ride on
Scalisnag is wild what happened there? It was the perfect grade to build a legit downhill flow trail but instead they built an (yet another) up track with extreme tight corners (it really doesn't ride good down)...
Scalisnag is almost always used as a down for a pavement shuttle to link into CBT network below. And why would anyone peddle up scalisnag now? Theres no down track!
See previous comment re: work done on Scallimag to connect into the Moonraker trail system, being a great add and always busy, particularly on weekends.
see previous question
See previous.
Share in previous comments
Summer long trail crew. Seems like the trail crew barely gets caught up in the spring then struggles again to get caught up in fall. Summer long trail crew would allow for maintenance to actually happen when it's needed.
Team up with KH to develop trails on their tenure. No application required. 4000 acres of land to build trails.

Thank you to the Cycling Club directors & Trail Crew that do such a great job of keeping the trails well maintained and signed!
Thanks for being so organized it's great to have a sweet trail network to come visit
Thanks for looking after the trail network and focusing on the local community. Please limit racing on our trails as it's hard on the trails. How to get visitors involved in supporting trail maintenance in Golden either by volunteering or money?
Thanks for the great trails!
Thanks for the hard work !
Thanks for your efforts!
Thanks to the executive for volunteering your time to make mountain biking great in Golden
The cycling club itself- would be nice to have a spot on Facebook to post looking for riding buddies or co-ed social ride nights.
The GCC is not a marketing organization. It is here to serve the riders that are already using the trails. No one else is worried about maintaining the quality of trails available so focus on that.
The improvements to Scalli this year was a great improvement. Another great addition to the upper trails, would be to link the play ground at the ski hill to the power lines on Twisted Sister. With this in place it would create a couple of options to ride up/down from the ski hill, and be a great extension to Twisted Sister. Link the lower part of Old Age and Treachery to Take It Easy to provide an alternative lower loop.
The kiosk board never have any info relating to what GCC is doing,
The new skill park is really nice
The old jerseys were great I loved the graphics. It would be cool seeing something unique like this again as I found the jerseys this year to be a bit boring.
The skills park is awesome
The skills park is wonderful! It would be nice to have some landscaping at the base that would prevent the muddy ruts, especially after a rain. Riders, especially kids, still ride and it is a bit messy/rutty. I wonder if some grass and/or benches would be nice for parents/friends watching riders. And maybe no camping during the golden 24 at the base of the skills park.
Trail crew has been doing a great job. Sad that some of the best trails are unsanctioned and at risk of being de-activated.
Trail maintenance has been great... would like to see more development
Trail maintenance is amazing. Getting that new skills park in, next level. Thank you for all your hard work!! If I don't have so many broken bones one year I'll try to get out for your work/ ride events.
trail maintenance is amazing. If I was being greedy I would love to see more trails groomed for winter fat biking and there is nothing quite like a freshly whipper snipped trail for fun times
Truly appreciate everything you guys have done to make biking in Golden amazing!!
We appreciate the work you put into this.
We could really use more focus on easier riding/trails. Trails like the kids are back are very few and far between. It's a fantastic trail but it's also one of the only trails for beginners to learn and progress on.
We have a terrific trail network. Big thank you to past and current volunteers. Love to see a mostly rideable hike/bike ridge trail South off the gondola that links into Moonraker network.
We have enough blue (green) level trails
We ran in to two really nice trail maintenance crew who gave us a shuttle up the hill. They didn't have to stop but did and were super friendly and great representatives of the community out there. Thanks! Great to be part of that community for a day.
Where the heck is the public transit? Why is there no bus to KHR, and why is there no bus to Mount 7 or moonraker /cbt?! Pretty rude to assume everyone can afford or have access to a vehicle.
Would be good to see an enduro race instead of xc
Would it be possible to build some more technical trail options in the CBT mainline area?
Would like to see more of the Enduro races. Once a month through the summer.
Y'all are great! We are so lucky to have such a dedicated club with members and representatives that really care about the trails and their riders.
You are all lovely
You are doing a great job! Keep it up!
You do a great job!
You guys rock and the maintenance is so good and appreciated
You read doing great job, Thank you!
You're doing great

Appendix B. Details of Economic Impacts

Appendix B – Explanation of Economic Impacts Model

An Input-Output Primer

National Accounting (also termed Economic Accounting) assumes a company undertakes two steps in its production process. First, it purchases material inputs from other industries; and second, it transforms those material inputs into finished goods (or services) ready for resale. Take as an example a Restaurant. The Restaurant buys raw food items from the Food Wholesaling sector. Using other material inputs (e.g., electricity, gas, rent, utensils, etc.), it transforms the raw food into a completed restaurant meal, which, in turn, is sold to the restaurant patron at a selling price higher than the cost of its material inputs. The difference between the selling price of the meal and the material input cost is the “mark-up” or “value-added”. This value-added is used to pay for the labour, any taxes levied by governments, the depreciation of equipment, any interest costs the Restaurant may have, and will also generate, the owner hopes, a profit.

National Accounting asserts that the value which the Restaurant sector adds to the economy (hence, the term “value added”) is equal not to the total revenues of the Restaurant, but only to this “mark-up” value. That is, the value of an industry to an economy is the difference between the value of its output (effectively, total operating revenues) and the cost of its material inputs. In this way, the Restaurant industry does not claim the value of the raw food inputs it uses, which should rightly be accounted for by the Agriculture and Food Manufacturing industries. Using “Value-Added”, there is no double counting when measuring the value of an industry.

In terms of a Restaurant, the value-added of the Restaurant will be equal to the revenue received minus all of its material costs for goods or services uses in preparing the meals (material inputs), or:

$$\text{Value Added} = \text{Revenue} - \text{Material Inputs}$$

Another way of defining value added is that it is the sum of an industry’s payments for labour, for indirect taxes, for depreciation and interest costs, and for profit:

$$\text{Value Added} = \text{Labour} + \text{Indirect taxes} + \text{Depreciation} + \text{Interest Costs} + \text{Profit}$$

In other words, the resulting value-added of any firm (or industry) is available to be shared among labour (wages, salaries and benefits), indirect taxes and “operating surplus.” The operating surplus itself is shared between payments for the use of physical capital (depreciation), payments for the use of monetary capital (interest costs), and payments (profits) to the owner(s) of the enterprise. Value-added is an industry’s contribution to, or **direct impact** on, the economy. And the sum of value-added of all industries is termed the country’s Gross Domestic Product (GDP).

An important distinction needs to be made between Financial Accounting and National Accounting. Under financial accounting, an industry which has a high value added (i.e., contributes a lot to the economy), can be unprofitable if, for example, its payments to labour or for interest costs are too high. Alternatively, low value-adding industries can be very profitable to their owners, depending on their usage of labour and their capital structure. Economists have standardized the measure of the flows of commodities between industries and the inter-relationships of inputs and outputs among industries through the concept of Input-Output (I/O) analysis. The **SUPPLY** matrix identifies the various types of output the sector produces (the Restaurant industry produces “restaurant” services). The **USE** matrix highlights all of the various types of inputs used to produce that output (the Restaurant industry uses a variety of inputs including raw foods, electricity, natural gas, rent, etc.). By mathematically manipulating these matrices, it is possible to determine by how much the supply of each commodity will increase when the output of an industry increases by one dollar.

The GDP-to-Output ratio is a measure of the direct contribution to the economy per dollar of output. Clearly, an industry that requires a lower dollar value of inputs to produce a given dollar of output is a higher value-adding industry. One must note, however, that a higher GDP-to-Output ratio does not imply that the industry is more important to the economy. It merely states that for every dollar of output the impact on the economy is greater. Obviously, when examining an industry’s importance to an economy one must also take into account the total output of the industry. There is, however, another important characteristic of an industry that must be examined if one is to determine the importance of a sector to the local economy: its **linkages** to other industries.

When inputs such as raw foods are purchased by the Restaurant sector, the industries supplying those goods and services (in this case, the Agricultural and Food Manufacturing industries) increase their own economic activity. This increased activity itself creates demand for other products. The Agricultural industry, for example, may need more fertilizer. Fertilizer producers themselves may need more chemicals and fuel oil. The demand for extra chemicals and fuel oil will, in turn, stimulate activity in the chemical and petroleum industries. The increased activity in the chemical industry will create greater demand for its own inputs, perhaps some other primary chemicals. And so it continues down the chain of industries. The sum effects of all this additional economic activity are known as **indirect impacts**.

Such **indirect impacts** (also known as “multiplier effects” or “spin-offs”) on the economy clearly are important. They should not be ignored (as they usually are with financial accounting) if we are to measure the true benefits of an industry to an economy. An interesting observation is that, while it is true that high value-adding industries generally have low indirect impacts, those industries with relatively lower direct impacts have relatively higher indirect impacts. This is because, by definition, low value-adding industries consume more inputs per dollar of output and thus have a greater impact on their supplying industries. It should be noted, however, that the level of indirect impacts is highly influenced by the type of goods and services demanded and by the propensity of the companies (or the economy) to import those particular goods and services. The higher the propensity to import the required goods and services, the lower will be the effects on the local economy. Indeed, an industry that imports all its inputs will have virtually no indirect impact on the economy, save the small level of distributive activity (wholesale, retail and transportation margins) the imports may generate.

Increased industrial activity has a third effect on the economy. When additional wages and salaries are paid out, those dollars (appropriately adjusted for taxes and savings) are available to be re-spent on consumer goods and services. Take, for example, an additional \$1 million in wages resulting in say, an increase of \$750,000 in disposable income. Depending on the spending patterns, this may result in extra consumer spending of say, \$500,000 in the retail sector (the remaining being spent in the entertainment sector, restaurant sector, etc.). This will increase the economic activity of the manufacturers and other suppliers of consumer goods to the retail sector who, in turn, will increase their own employment and their own wage payments. The sum effects of this additional activity due to increased wages are known as **induced impacts**. Again, it should be clear that, like indirect impacts, induced impacts are highly influenced by the economy's propensity to import as well as by the economy's taxation and savings rates, the level of wages paid to employees and the level of capacity at which the economy is operating.

The question arises: given that there are many levels of indirect and induced spending which affect many, many different firms and industrial sectors, how can we estimate these impacts on the economy? Fortunately, economists have developed a method to estimate these impacts, by using the same input-output tables to which we already have been introduced. However, since the base information is coming from financial statement data directly provided by operators, it is critical to understand how financial statement data are re-structured to meet National Accounting standards. These differences are discussed below.

Technical Differences

Although the National Accounting (Input-Output) measurement of the value and impacts of an industry begins with the same set of data as the financial results of the industry, a number of adjustments are required in order to conform to strict National Accounting standards. To avoid possible confusion, these technical differences between Financial Accounting and National Accounting should be understood, although not all the differences relate to the Restaurant example we are using in this primer. The intent here is not to provide a comprehensive or definitive discussion of these differences, however, but rather to provide a cursory overview. For a more in-depth discussion of the differences and of the methodology underlying National Accounting, the interested reader is referred to the National Accounting compendium published by the UN.

The following outlines the major differences:

1. The first and perhaps most important difference is that National Accounting measures all non-tax related revenues and expenses related to production, even those not itemized on the corporate income statement. Hence, gratuities paid to staff are included as output. This increases output but not material inputs, and therefore it increases the estimate of GDP (Output – Inputs) by precisely the amount of gratuities. Using our other definition of GDP (GDP = indirect taxes + wages, salaries and benefits + operating surplus), we see that the increase in GDP is reflected in an increase in wages and salaries equal to the reported gratuities.

Another (usually) off-budget item is an estimate of the value of imputed room and board provided to employees. On the Output side there is an increase in lodging revenues and, since the provision of room and board is a value to the employee, it is considered equivalent to a wage, and thus contributes to overall GDP equal to the value of the imputed room and board. Statistics Canada has standard values that it uses to assess the value of this room and board.

2. At the same time, National Accounting omits revenues not directly related to the production process. Generally, these incomes are limited to interest and dividend earnings, but include non-operating revenues related to rental incomes, commissions and the like.
3. A third difference is that, under National Accounting, the value of each input in the **USE** matrix is stated in “producer” or “basic” prices. That is, all wholesale, retail, and transportation costs included in the “purchaser” price of a commodity are removed, as are all commodity taxes, indirect taxes and import duties. These “distributive and tax margins,” as they are called, are explicitly recognized in the **USE** matrix as separate line items. For the Restaurant industry, the purchase cost of food will be equal to the “producer” cost of food (the cost at the manufacturer’s plant gate) plus the cost of transporting the food (the “transportation” margin) plus any retail/wholesale mark-ups plus any indirect taxes. The reader should understand that this does not in any way reduce the total cost of inputs to the industry; it simply re-assigns the costs to different input categories.
4. A fourth difference lies in the treatment of merchandise sales. National Accounting treats the purchase of merchandise as partly a purchase from the manufacturer of the good (equal to the cost price of the good less distributive and tax margins) and partly a purchase from the retailer (equal to the mark-up for the good). Consequently, in an input-output table for a sector selling retail goods, there is no recognition of the cost of the merchandise on the input (**USE**) side, and only the mark-up value is recognized on the output (**SUPPLY**) side. The cost of the merchandise is captured in the Manufacturing sector as output.

Appendix B – Detailed Economic Impacts Table

TOURISM SPENDING IMPACTS TOTAL SPEND									
	REGION: Columbia-Shuswap			19	REST OF BRITISH COLUMBIA				
	Direct in Golden	Indirect in CSRD	Induced in CSRD	REGIONAL TOTAL	Direct***	Indirect	Induced	REST OF BC TOTAL	TOTAL IMPACTS, BC
Consumer Spending*	\$5,553,207	\$509,787	\$651,308	\$6,714,302	\$227,267	\$1,223,006	\$782,039	\$2,232,312	\$8,946,614
<i>Direct International Imports</i>	\$893,969	\$34,989	\$88,288	\$1,017,247	\$55,169	\$81,152	\$106,008	\$242,328	\$1,259,575
<i>Direct Interprovincial Imports</i>	\$324,562	\$47,200	\$49,194	\$420,956	\$84,382	\$108,621	\$59,067	\$252,070	\$673,026
<i>Direct Forward Taxes</i>	\$642,685	\$0	\$21,628	\$664,312	\$0	\$0	\$25,968	\$25,968	\$690,280
Domestic Output**	\$3,691,991	\$427,598	\$492,198	\$4,611,787	\$87,717	\$1,033,233	\$590,996	\$1,711,945	\$6,323,733
GDP at Basic Prices	\$2,004,961	\$257,478	\$362,118	\$2,624,557	\$30,385	\$550,016	\$347,589	\$927,989	\$3,552,546
Real GDP at Basic Prices (\$2012)	\$1,284,598	\$183,165	\$284,658	\$1,752,420	\$16,592	\$387,343	\$273,236	\$677,171	\$2,429,591
Material Inputs	\$1,687,030	\$170,120	\$130,080	\$1,987,231	\$57,332	\$483,217	\$243,407	\$783,956	\$2,771,187
Labour Income	\$1,415,210	\$166,889	\$114,621	\$1,696,720	\$11,459	\$341,665	\$234,867	\$587,991	\$2,284,711
<i>Wages and Salaries</i>	\$1,163,730	\$106,692	\$79,395	\$1,349,817	\$9,480	\$230,902	\$127,029	\$367,411	\$1,717,228
<i>Mixed Income</i>	\$135,472	\$46,897	\$25,447	\$207,816	\$248	\$83,521	\$92,316	\$176,085	\$383,901
<i>Employers' social contributions</i>	\$116,008	\$13,300	\$9,779	\$139,087	\$1,732	\$27,242	\$15,521	\$44,494	\$183,582
Employment (jobs)	33.0	2.6	2.2	37.8	0.1	5.3	3.1	8.6	46.4
Employment (FTEs)	24.1	2.0	1.7	27.9	0.1	4.2	2.4	6.7	34.6
Total Taxes	\$1,012,771	\$58,045	\$99,527	\$1,170,343	\$3,750	\$119,431	\$106,470	\$229,651	\$1,399,994
<i>Total Federal Taxes</i>	\$501,796	\$28,887	\$47,309	\$577,992	\$2,132	\$57,728	\$48,328	\$108,188	\$686,181
<i>Total Indirect Taxes</i>	\$327,864	\$1,924	\$13,311	\$343,099	\$56	\$4,645	\$15,982	\$20,683	\$363,782
<i>Fed Trading Profits Tax</i>	\$0	\$0	\$21	\$21	\$0	\$0	\$26	\$26	\$47
<i>Fed Gasoline Tax</i>	\$21,403	\$246	\$346	\$21,994	\$10	\$710	\$415	\$1,135	\$23,129
<i>Fed Excise Tax</i>	\$23	\$1	\$1	\$24	\$1	\$2	\$1	\$4	\$28
<i>Fed Excise Duties</i>	\$4,918	\$86	\$434	\$5,439	\$2	\$227	\$522	\$751	\$6,190
<i>Fed Air Transport Tax</i>	\$287	\$46	\$270	\$603	\$3	\$111	\$325	\$438	\$1,041
<i>Fed Import Duties</i>	\$44,538	\$106	\$270	\$44,914	\$27	\$275	\$324	\$626	\$45,540

Summer 2023 – Golden Mountain Biking Economic Impact

GST	\$254,229	\$858	\$10,907	\$265,993	\$6	\$2,078	\$13,096	\$15,180	\$281,173
Fed Proportion of HST	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Indirect Taxes on Production	\$2,468	\$582	\$1,061	\$4,111	\$7	\$1,242	\$1,273	\$2,523	\$6,634
Personal Income Taxes	\$126,136	\$19,388	\$13,324	\$158,849	\$1,358	\$39,064	\$16,405	\$56,826	\$215,675
Corp. Income Taxes	\$47,795	\$7,574	\$20,674	\$76,044	\$719	\$14,019	\$15,941	\$30,679	\$106,724
Total Provincial Taxes	\$471,195	\$21,604	\$38,185	\$530,984	\$1,515	\$45,541	\$41,294	\$88,350	\$619,334
Total Indirect Taxes	\$383,895	\$8,272	\$21,315	\$413,482	\$332	\$19,896	\$25,593	\$45,820	\$459,302
Prov Environmental Tax	\$29,067	\$1,004	\$1,045	\$31,116	\$84	\$2,572	\$1,254	\$3,910	\$35,027
Prov Trading Profits Tax	\$12,457	\$278	\$3,350	\$16,085	\$7	\$726	\$4,023	\$4,756	\$20,841
Prov Gas Tax	\$66,017	\$904	\$1,172	\$68,093	\$29	\$2,524	\$1,407	\$3,960	\$72,053
Prov. Land Transfer Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prov Other Tax	\$1,965	\$0	\$102	\$2,066	\$0	\$0	\$122	\$122	\$2,189
PST	\$258,472	\$2,330	\$8,800	\$269,602	\$167	\$6,061	\$10,566	\$16,794	\$286,396
Provincial Proportion of HST	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Aboriginal Trading Profits	\$0	\$0	\$5	\$5	\$0	\$0	\$6	\$6	\$11
Prov. Indirect Taxes on Production	\$15,917	\$3,757	\$6,840	\$26,514	\$45	\$8,013	\$8,213	\$16,271	\$42,785
Royalties/Prov. Resource Taxes	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Personal Income Taxes	\$50,689	\$7,680	\$5,028	\$63,397	\$554	\$15,383	\$6,312	\$22,249	\$85,646
Corp. Income Taxes	\$36,611	\$5,651	\$11,842	\$54,105	\$630	\$10,262	\$9,389	\$20,281	\$74,386
Total Municipal/RD Taxes	\$39,779	\$7,555	\$14,033	\$61,367	\$103	\$16,161	\$16,849	\$33,113	\$94,480
Municipal Land Transfer Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Municipal Sales Tax****	\$8,409	\$150	\$551	\$9,110	\$14	\$369	\$661	\$1,044	\$10,154
Property, Business & Other Mun. Taxes	\$31,370	\$7,404	\$13,482	\$52,257	\$89	\$15,792	\$16,188	\$32,069	\$84,326

*Consumer Spending includes Forward Consumer Taxes (e.g., accommodation taxes on hotel visits is included in spending).

**Domestic Output is equal to Spending minus Imports minus Consumer Taxes.

***Rest of British Columbia Direct: The producer cost of goods (i.e., the cost excluding wholesale, retail and transportation margins, taxes, etc.) is measured at the factory gate.

For some consumer spending (think the purchase of clothing) those factories may be located in other regions. Consumer taxes are assigned to Columbia-Shuswap

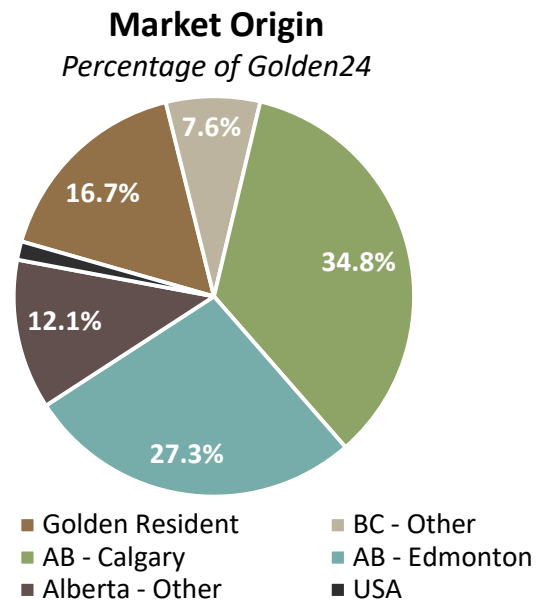
****Municipal Sales Taxes includes Accommodation MRDT taxes, municipal parking taxes and MST on Electricity.

Appendix C. Golden24 Insights

The Golden24 event is held over a weekend in June. This season, it was between June 16-18, 2023. According to the organizer, there were 397 participants (including local participants) and 300 non-local supporters and spectators. GCC interviewers conducted a total of 66 completed interviews onsite with 14 also completing the follow up survey. Due to the small sample size, there are limited insights from the follow up available. The key highlights from this event are summarized below.

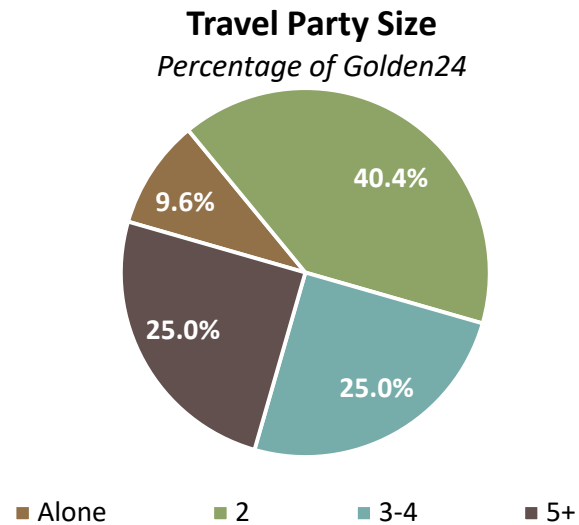
Market Origin

Alberta is the largest source market for the Golden24 event with 74.2% from here – predominantly coming from Calgary (34.8%) and Edmonton (27.3%). 16.7% were Golden residents with an additional 7.6% being from other places in BC.



Travel Party

Overall, most Golden24 respondents (40.4%) were travelling in a group of 2 people. Overall, Golden24 respondents had an average travel party size of 3.7 with 31% having children in their travel party. This is notably higher travel party size and percentage travelling with kids than the general mountain biking population.



Travel Party	Total Golden24 Visitors
Travel Party Size	3.7
Adults	3.1
Children (under 18)	0.6
% with Children (under 18)	31%

Q. We just have some questions about your trip to Golden in general. You mentioned you are a visitor to Golden, including yourself, how many people are in your travel party? How many are children under 18 and how many are adults?

Base: All Golden24 Visitor Intercept respondents, Total n=52.

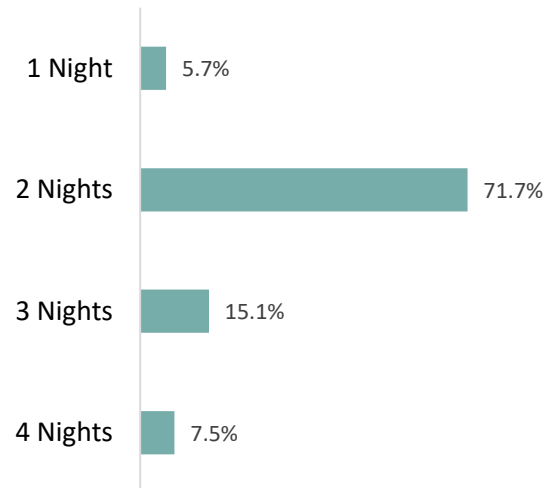
Length of Stay

Golden24 visitors appear to be only travelling for the event therefore their total trip length is the same as their trip length within Golden which is 2.3 nights. The majority of participants (71.7%) stay two nights in Golden.

Length of Stay	Overnight Golden24 Visitors
Average nights on trip	2.3
Average nights in Golden	2.3

Number of Nights in Golden

Percentage of Overnight Golden24 Visitors

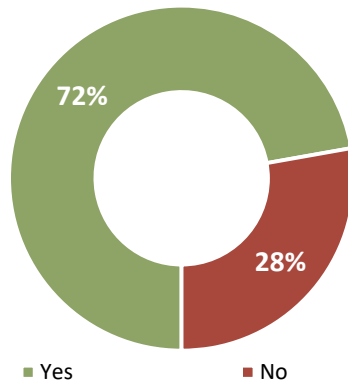


Q. What is your total trip length - that is, how many nights are you away from home on this trip?

Base: All Overnight Golden24 Visitor Intercept respondents, Total n=52/53.

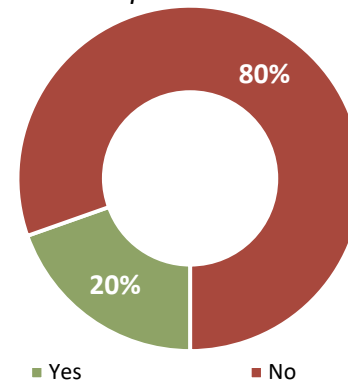
Nearly three-quarters (72%) of participants noted that they were staying at the Golden24 camping/RVing areas. The remaining 28% were staying in other accommodations – mainly paid fixed-rood accommodations such as hotels and motels. One-in-five Golden24 respondents also reported that they were staying at least one additional night in Golden either before or after the event.

Staying at Event
*Percentage of Golden24
Respondents*



Q. Are you staying here at the Golden 24 camping/RVing areas?
Base: All Overnight Golden24 Visitor Intercept respondents, Total n=54.

**Staying Additional Nights in
Golden**
*Percentage of Golden24
Respondents*



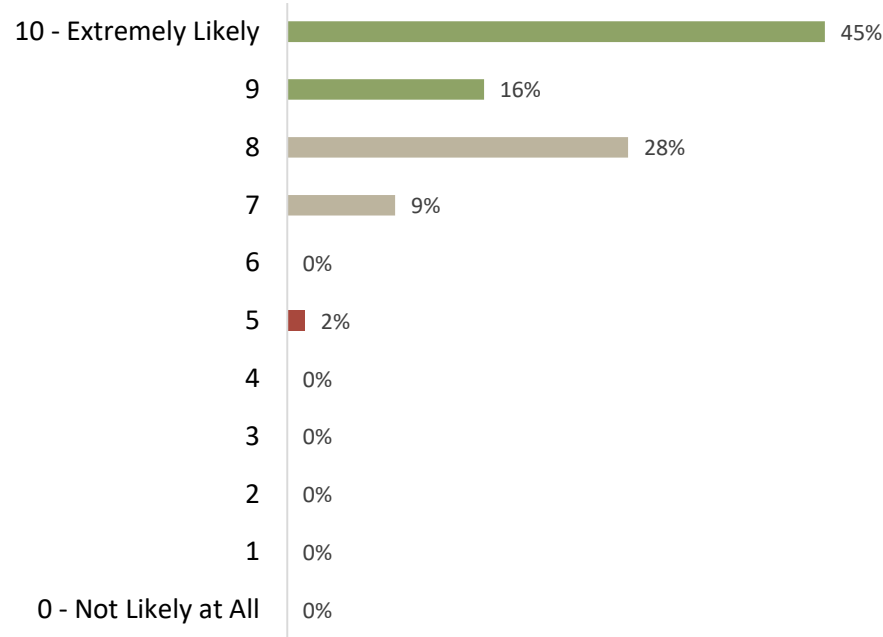
Q. Are you staying in Golden any additional nights before or after the Golden 24 event?
Base: All Overnight Golden24 Visitor Intercept respondents, Total n=51.

Experience Evaluation

Golden24 respondents are strong promoters of Golden as a Mountain Biking destination. In fact, 61% are classified as promoters having rated their likelihood to recommend Golden as a mountain biking destination as '9' or '10-Extremely Likely' on a scale of '0 – Not Likely at All' to '10-Extremely Likely'. This bodes well as the Golden24 event likely results in residual visitation not only from participants and their support crew but also from new mountain bike visitors.

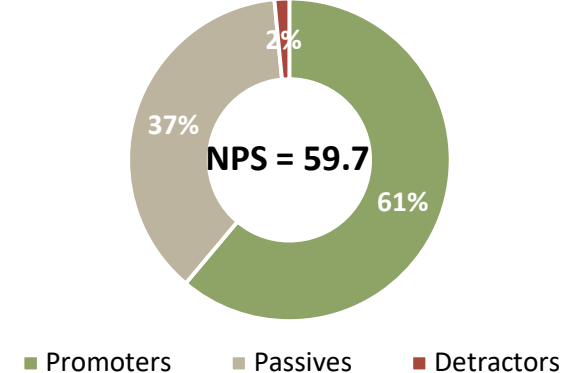
Likelihood to Recommend Golden as a Mountain Biking Destination

Percentage of Golden24 Respondents



Golden's Net Promoter Score as Mt Biking Destination

Percentage of Golden24 Respondents



Q. On a scale of 0 to 10 where 0 is not likely at all and 10 is extremely likely, how likely are you to recommend Golden as a mountain biking destination?

Base: All Golden24 intercept respondents excluding PNA/DK Total n=67.

Expenditures (Golden24 Visitors Only)

Based on survey respondents, we can estimate the direct expenditures for Golden24 Visitors to Golden. Outside of event costs, we estimate that this event brings \$76,489 in direct expenditures to Golden. The majority of these expenditures (\$64,221) are trip-related expenditures such as accommodation and food while \$12,268 are Mountain Biking-related expenditures such as bike maintenance and repairs.

Source	<i>Golden24 Visitors Per Person Spend</i>	<i>Golden24 Visitors Estimated Spend</i>
Golden24 Visitors – Mountain Biking - Related Spend in Golden	\$18.56	\$12,268
Golden24 Visitors – Trip-Related Spend in Golden	\$92.60	\$64,221
TOTAL Expenditures in GOLDEN	\$111.16	\$76,489

Trip-Related Expenditures in Golden

Total Trip-Related Expenditures*	<i>Golden24 Visitors Event</i>
Accommodation (if overnight)	\$13,165
Transportation	\$14,450
Food and Beverage	\$20,230
Shopping	\$5,459
Attractions	\$3,532
Other Outdoor Recreation	\$1,927
Entertainment	\$4,817
Other Travel-Related Expenditures	\$642
Average Per Person Trip Expenses for Event	\$64,221
Average Per Person Trip Expenses	\$92.60

* Breakdown of trip expenditure type based on small sample size (n=10) therefore use extreme caution when interpreting results.

Appendix D. Questionnaires

A1. Onsite Survey

**Golden Cycling Club
Mountain Biking Study – Summer 2023
Intercept Survey DRAFT June 19**

Interviewer: _____

S1. Date: _____

S2. Location:

- a. Cedar Lake
- b. CBT Parking Lot
- c. Reflection Lake
- d. Kicking Horse Mountain
- e. Other: _____

1. My name is \${INTERVIEWER} and I'm conducting a survey on behalf of the Golden Cycling Club. May I ask you some questions about your mountain biking in the area? IF NEEDED: The survey will take approximately 3-5 minutes.

- a. Yes
- b. No – Not Mountain Biking | RECORD GENDER, THANK & TERMINATE
- c. No – Previously completed | RECORD GENDER, THANK & TERMINATE
- d. No - Other | RECORD GENDER, THANK & TERMINATE

2. Are you a ...?

- a. Permanent Resident of Golden / CSRD Area A
- b. A day visitor to Golden (not staying a night in Golden)
- c. An overnight visitor staying in Golden for 1 to 29 nights
- d. A seasonal visitor staying for 30 nights or more

- e. A property owner in Golden or Kicking Horse, but not resident
- f. PREFER NOT TO ANSWER

3. Have you or anyone in your group already been approached to complete a survey by the Golden Cycling Club [IF RESIDENT: “today?” | IF VISITOR: “on this trip?”]

- a. Yes | **RECORD GENDER, THANK & TERMINATE.**
- b. No
- c. PREFER NOT TO ANSWER | **RECORD GENDER, THANK & TERMINATE.**

4. Are you a Golden Cycling Club member?

- a. Yes
- b. No

5. ASK IF Q2~=1, Where do you live?

Defined as your usual place of residence...choose one

- a. BC
- b. Alberta
- c. Other Canada
- d. USA
- e. Overseas
- f. PREFER NOT TO ANSWER

Question logic: This question will show when: Question "Where do you live?

Defined as your usual place of residence....choose one "is one of the following answers ("BC", "Alberta")

6. ASK IF Q5=a OR b, What community do you live in?

Select one. If you don't know write in the community under other.

- ☐ BC – Revelstoke
- ☐ BC - Columbia Valley
- ☐ BC - Okanagan Valley (Kelowna, Penticton)
- ☐ BC - Lower Mainland (Vancouver, Fraser Valley)
- ☐ BC - Other: Write In _____
- ☐ AB - Calgary

- ☐ AB - Edmonton
- ☐ AB - Red Deer
- ☐ AB - Bow Valley
- ☐ AB - Fort McMurray
- ☐ AB - Lethbridge
- ☐ AB – Write In _____
- ☐ PREFER NOT TO ANSWER

Question logic: This question will show when: Question "Where do you live?"

Defined as your usual place of residence....choose one "is one of the following answers ("Other Canada")

7. ASK IF Q5 = c, What province do you live in?

- ☐ Ontario
- ☐ Quebec
- ☐ Manitoba
- ☐ Saskatchewan
- ☐ Nova Scotia
- ☐ New Brunswick
- ☐ Newfoundland
- ☐ PEI
- ☐ Yukon
- ☐ NWT
- ☐ Nunavut
- ☐ PREFER NOT TO ANSWER

Question logic: This question will show when: Question "Where do you live?"

Defined as your usual place of residence....choose one "is one of the following answers ("BC", "Alberta" "Other Canada")

8. ASK IF Q5 = a, b OR c, What is your postal code?

IF NEEDED: Please note, providing a full postal code helps us better understand our visitors.

[i.e. V5N0M2, alpha-numeric, no spaces]

- ☐ Postal Code: _____
Does NOT Want to Share Postal Code
- ☐ Doesn't Know Postal Code
- ☐ PREFER NOT TO ANSWER

Question logic: This Question will show when: Question "Where do you live?

Defined as your usual place of residence....choose one "is one of the following answers ("USA")

9. ASK IF Q5 = d, What US State are you from?

- a. USA – Washington
- b. USA – California
- c. USA – Oregon
- d. USA – Idaho
- e. USA – New York
- f. USA – Texas
- g. USA – Florida
- h. USA – Illinois
- i. USA – Colorado
- j. USA – Arizona
- k. USA – Michigan
- l. USA - Other: Write In: _____ *
- m. PREFER NOT TO ANSWER

**10. ASK IF Q5 = d, If USA, what is your zip code? [IF NEEDED: Please note, providing a 5-digit zip code helps us better understand our visitors.
[i.e. 90210, 5-digit numeric zip code]**

- ☐ Zip Code: _____
- ☐ Does NOT Want to Share Zip Code
- ☐ Doesn't Know Zip Code
- ☐ PREFER NOT TO ANSWER

11. ASK IF VISITOR (Q2=2,3)

We just have some questions about your trip to Golden in general.

You mentioned you are a visitor to Golden. Including yourself, how many people are in your travel party? How many are children under 18 and how many are adults? (Travel party includes individuals who have the same itinerary and/or shared expenses.) Please enter the number in each category. If none, please enter '0'.

_____ Adult(s) + _____ Child(ren) (under 18) = _____ Total [AUTOSUM]

12. **ASK IF VISITOR (Q2=2,3), What is your total trip length -that is, How many nights are you away from home on this trip?**

Fill in the number of nights, the answer should be a numeric value. The value should be less than 365.

- ☐ None, just away for the day
- ☐ Nights: _____
- ☐ Don't Know/Not Sure

13. **Q12=Nights or Don't Know, And how many of those nights are you in Golden?**

Fill in the number of nights, the answer should be a numeric value. The value should be less than 365.

- ☐ None, just here for the day
- ☐ Nights: _____
- ☐ Don't Know/Not Sure

14. **Q13=Nights or Don't Know, Which of the following best describes your primary (most often used) type of accommodation on this trip while in Golden?** [IF NEEDED,PROBE: Would that be...[READ]]

- a. Hotel
- b. Motel
- c. B&B / Guest House
- d. Vacation Rental / Airbnb / VRBO / Other 'Sharing Economy' Accommodation
- e. Campground / RV Park
- f. Friends and/or Family
- g. Other, please specify: _____
- h. PREFER NOT TO ANSWER

15. **Q14=1-5, OR 7, And is your accommodation located in...?**

- a. Downtown Golden
- b. Golden Adjacent to Highway 1 (i.e. hotel row along hwy)
- c. Kicking Horse Mtn. Resort
- d. South of Downtown (i.e. along hwy 95 incl camping)

- e. North of Hwy 1 (i.e. Blaeberry/North Bench)
- f. Other, please specify: _____
- g. PREFER NOT TO ANSWER

SECTION 2: This next section asks about the mountain bike trip in Golden.

16. ASK IF OVERNIGHT VISITOR (Q2=3), AND LOCATION ~= KICKING HORSE, Are you riding the bike park at Kicking Horse Resort on this trip?

- a. Yes
- b. No
- c. Not Sure
- d. PREFER NOT TO ANSWER

17. ASK IF OVERNIGHT VISITOR (Q2=3), AND LOCATION = KICKING HORSE, Are you riding any of the Golden trails outside of the bike park at Kicking Horse Resort on this trip?

- a. Yes
- b. No
- c. Not Sure
- d. PREFER NOT TO ANSWER

18. ASK IF OVERNIGHT VISITOR (Q2=3) OR IF Q13=Nights, On this trip, how many days do you plan to mountain bike in Golden?

- a. # Days
- b. Don't Know/Not sure
- c. PREFER NOT TO ANSWER

19. ASK IF (Q18=Days) AND Q17=a(YES) OR, IF (LOCATION=a,b,c or d) AND IF (Q18=Days), Of those, how many trail days (or partial days) do you plan to spend at the following Golden locations?

- a. CBT Mainline Trails: _____
- b. Moonraker Trails: _____
- c. Mount 7 Trails: _____
- d. Mountain Shadows Trails: _____
- e. Not sure
- f. PREFER NOT TO ANSWER

20. ASK IF LOCATION = KICKING HORSE OR Q16=a(Yes), And how many trail days (or partial days) do you plan to spend at the Kicking Horse Mountain Resort Bike Park?

- a. Kicking Horse Bike Park: _____
- b. Not Sure

c. PREFER NOT TO ANSWER

21. ASK IF VISITOR (Q2=2,3), On this trip to Golden are you or anyone in your travel party using the services of mountain bike tour, lessons or rental business? Which one(s)?

- a. No
- b. Yes – Tour/Guide (including Heli-biking)
- c. Yes – Lessons
- d. Yes – Rental (Higher Ground – in town)
- e. Yes – Rental (Selkirk Ski & Bike – at Kicking Horse Village)
- f. Yes – Rental (Kicking Horse Resort)
- g. PREFER NOT TO ANSWER

SECTION 3: This next section asks about your mountain bike riding Today.

22. Which of the following apps or services, if any, are you using to track your rides today?

PLEASE NOTE THIS DOES NOT INCLUDE USING APP FOR INFORMATION ONLY.

- a. Trail Forks (not just for information but to log their ride)
- b. Strava
- c. Garmin
- d. Other, please specify:
- e. None – not tracking my rides today
- f. PREFER NOT TO ANSWER

23. Including yourself, how many people are in your riding party today?

- a. Just myself
- b. # People: _____
- c. Don't Know/Not Sure
- d. PREFER NOT TO ANSWER

24. Did you get to the trails/hill today?

- a. By Vehicle – Parked in Lot
- b. By Vehicle – Shuttled
- c. By Bike
- d. Other- Specify: _____

25. ASK IF Q24=a or b, How many people were in the vehicle you arrived in today?

- a. Just myself

- b. # People in Vehicle: _____
- c. Don't Know/Not Sure
- d. PREFER NOT TO ANSWER

26. ASK IF LOCATION =a, b, c, or e, How many trails do you plan to ride today?

- a. # Trails: _____
- b. Don't Know/Not Sure
- c. PREFER NOT TO ANSWER

27. Are you aware that there are adaptive trails in the CBT Trail network? (If needed: adaptive trails are specifically designed to accommodate riders using adaptive bikes. Specifications include a range of elements including but not limited to width of trail, running slope, berm radius and slope, and obstacles)

- a. Yes
- b. No/Not Sure
- c. PREFER NOT TO ANSWER

28. Do you, or anyone you know, ride an adaptive bike?

- a. Yes
- b. No
- c. Not Sure
- d. PREFER NOT TO ANSWER

29. ASK IF Q26=YES, Would having more adaptive trails, increase how often you ride Golden's trail network? [IF NEEDED: Outside of the Bike Park]

- a. Yes
- b. No
- c. PREFER NOT TO ANSWER

SHOW IF VISITOR (Q2=2,3), SECTION 4: To calculate the economic impact of Mountain Biking, we need to know about how much you will spend on mountain biking and other trip related expenditures while in Golden on this trip.

30. ASK IF VISITOR (Q2=2,3), First, let's talk about Mountain Biking related expenses. About how much will you and your entire travel party spend on the following items while in Golden on this trip?

- a. Mountain Bike Tickets (i.e. Kicking Horse Bike Park): \$ _____
- b. Mountain Bike Rentals (including safety equipment): \$ _____
- c. Mountain Bike Tour or Guiding Services: \$ _____
- d. Mountain Bike Parts: \$ _____

- e. Mountain Bike Maintenance/Repairs: \$_____
- f. Shopping/Retail purchases related to Mountain Biking: \$_____
- g. NOT SURE
- h. PREFER NOT TO ANSWER

31. ASK IF VISITOR (Q2=2,3), Now, let's talk about trip related expenditures. Thinking about accommodations if applicable, food, activities, shopping and transportation, approximately how much will your travel party spend on this trip while in Golden?

[An estimate is fine]

\$_____
Don't Know/No Response

32. ASK IF VISITOR (Q2=2), Including this trip, what is your best estimate as to how many day trips you have/will personally make to Golden to ride over the summer 2023 season?

- a. Just this trip
- b. # Day Trips: _____
- c. Don't Know/Not Sure
- d. PREFER NOT TO ANSWER

33. ASK IF VISITOR (Q2=3) OR ID Q13=Nights, Including this trip, what is your best estimate as to how many overnight trips you have/will personally make to Golden to ride over the summer 2023 season?

- a. Just this one
- b. # Overnight Trips: _____
- c. Don't Know/Not Sure
- d. PREFER NOT TO ANSWER

34. Have you, or do you plan to, donate to the Golden Cycling Club this trip or season?

- a. Yes
- b. No
- c. Not Sure
- d. PREFER NOT TO ANSWER

35. ASK IF RESIDENT (Q2=1,4,5), What is your best estimate as to how many days you have/will personally ride on the following trail networks in Golden over the summer 2023 biking season?

- a. CBT Mainline Trails: _____

- b. Moonraker Trails: _____
- c. Mount 7 Trails: _____
- d. Mountain Shadows Trails: _____
- e. Kicking Horse Bike Park: _____
- f. NOT SURE
- g. PREFER NOT TO ANSWER

36. Do you have a 2023 season's pass for the Bike Park at Kicking Horse?

- a. Yes
- b. No
- c. PREFER NOT TO ANSWER

37. ASK IF LOCATION~=KICKING HORSE AND Q17=YES, On a scale of 1 to 5 where 1 is 'not satisfied at all' and 5 is 'very satisfied', what is your level of satisfaction with the Mountain Bike trails in Golden? (not including the Bike Park at Kicking Horse)

- a. Not Satisfied at All
- b. _____
- c. _____
- d. _____
- e. Very Satisfied
- f. Not Sure Yet
- g. PREFER NOT TO ANSWER

38. On a scale of 0 to 10 where 0 is not likely at all and 10 is extremely likely, how likely are you to recommend Golden as a mountain biking destination?

- 0. Not Likely at All
- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. Extremely Likely
- 11. PREFER NOT TO ANSWER

39. How likely are you to recommend the Bike Park at Kicking Horse Mountain Resort to other riders?

1. Not Likely at All
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
10. Extremely Likely
11. PREFER NOT TO ANSWER

Lastly, just a few questions for statistical purposes...

40. In which of the following age categories are you? Are you...

Choose one response.

- a. 19-24 years
- b. 25-34 years
- c. 35-44 years
- d. 45-54 years
- e. 55-64 years
- f. 65-74 years
- g. 75 years or older
- h. Prefer not to answer

41. What gender do you identify as? Please select one response.

- a. Female/Woman/Feminine
- b. Male/Man/Masculine
- c. Non-Binary, Gender Fluid, and/or Two-Spirit
- d. My gender identity is not listed, please specify _____
- e. Prefer not to answer / don't know

42. *ASK IF RESIDENT & GCC MEMBER*, To accurately estimate the economic impact from mountain biking in Golden, we need to understand your annual expenditures. As a follow-up to this interview, we will be sending out a survey to all Golden Cycling Club members in September to

inquire about your expenditures. We hope that you will watch for it and respond. **END**

Does the Golden Cycling Club have your current email on file?

- a. Yes
- b. No: What email address you like us to send it to: _____
- c. Not sure: What email address you like us to send it to: _____
- d. PREFER NOT TO ANSWER

43. *ASK IF RESIDENT & NOT GCC MEMBER*, To accurately estimate the economic impact from mountain biking in Golden, we need to understand residents' annual expenditures. As a follow-up to this interview, we would like to contact you in September to inquire about your expenditures. This would involve being contacted via email and completing a short online survey. All personal contact information will be kept confidential and only used for this study. By completing the online follow up questionnaire, you will be eligible for a draw for one of three Pre-paid Visa Gift cards valued at \$100, \$150 and \$250.

Are you willing to participate?

- a. Yes – email to use for that purpose: _____
- b. No

44. *ASK IF NOT RESIDENT*, Thank you for your time today - your participation is very much appreciated. As a follow-up to this interview, we would like to contact you in a few weeks after you get home to ask a bit more about your trip. This would involve being contacted via email and completing a short online survey. All personal contact information will be kept completely confidential. Your email will NOT be shared and will only be used for this one study.

By completing the follow up questionnaire, you will be eligible for a draw to win one of three pre-paid gift cards valued at \$100, \$150 and \$250 [IF NEEDED: they are pre-paid Visa Gift Cards in Canadian dollars and accepted worldwide].

Would you be willing to participate?

- 1. Yes
- 2. No - go to THANKS & CLOSE

45. What email should we use for that purpose?

_____@_____._____

That concludes our interview. Thank you again for taking the time to speak with me today. Have a wonderful day/evening.

A2. Follow Up Survey

Landing Page:

Welcome to the Golden Cycling Club economic impacts of Mountain Biking survey.

Thanks for taking the time to complete the survey.

By completing this survey before **October 31, 2023** you will be entered into a draw one (1) of three (3) pre-paid VISA cards each valued at \$100, \$150, and \$250 (Canadian). The selected entrants will be notified in early November.

If you need to exit the survey and complete it at another time, simply close the survey window. You can use the email invitation link to return to the survey and start where you left off.

How to navigate: Please use the NEXT button at the bottom of your screen to navigate through this survey. If you need to go back to a previous answer, please use the BACK link at the top left hand of the page. Do not use your web browser's navigation buttons located at the top of your screen as they may cause connection errors.

Confidentiality: All of your responses will be kept confidential and only be used for this study.

Questions? If you are having technical difficulties with the survey software, please contact Align Consulting at surveys@alignconsultinggroup.ca If you have questions about the project please contact the Golden Cycling Club at events@goldencyclingclub.com
Thank you!

Survey:

We are studying Mountain Biking in and around Golden, BC. We wanted to let you know what we consider the Golden area. Golden is in the heart of Kicking Horse Country, is located between Glacier National Park (to the west), Yoho National Park (to the east), Kinbasket Lake (to the north), and the Columbia Valley wetlands (to the south). The Golden area includes the Columbia Shuswap Regional District (CSRD) Area A, the Town of Golden, Kicking Horse Mountain Resort.

Please keep this in mind when answering the following survey questions.

Q1. Please confirm where you live. Is it..

- Outside of the Golden area/the CSRD Area A
- In the Golden area/the CSRD Area A

RESIDENT SECTION:

Q2. In total, what is your best estimate as to how many days you personally rode the Mountain Bike trails in the Golden area over the 2023 season? The 2023 season is between June 1, 2023 and September 30, 2023.

Total Days (or Partial Days) Spent Mountain Biking in the Golden area: _____

Q3. How many of those [PIPE IN Q2 ANSWER] days (or partial days) did spend at each of the following Golden Mountain Biking sites/locations? *Please fill in the number of days, the response should make sense given the number of total Mountain Biking days. If you did not ride at a site, please enter '0'*

1. CBT Mainline Trails: _____
2. Moonraker Trails: _____
3. Mount 7 Trails: _____
4. Mountain Shadows Trails: _____
5. Kicking Horse Bike Park: _____
6. Other Areas: _____

To calculate the economic impact of Mountain Biking, we need to know about how much you spent on mountain biking in Golden this season (summer 2023).

Q4. About how much did you spend this season on the following items in Golden?

1. Mountain Bike Tickets (i.e. Kicking Horse Bike Park): \$ _____
2. Mountain Bike Rentals (including safety equipment): \$ _____
3. Mountain Bike Tour or Guiding Services: \$ _____
4. Mountain Bike Parts: \$ _____
5. Mountain Bike Maintenance/Repairs: \$ _____
6. Shopping/Retail purchases related to Mountain Biking: \$ _____
7. Other Mountain Biking Expenses: \$ _____
8. NOT SURE
9. PREFER NOT TO ANSWER

Q4b. IF Q4.7>\$0 ASK: What is included in 'Other Mountain Biking Expenses'?

VISITOR ONLY SECTION

About your summer 2023 trip...

If you have traveled to Golden more than once this summer, please think about the trip during which you were asked to participate in this survey while mountain biking. Our records show this was in [PIPE IN FROM INTERCEPT] [invite('custom 4')].

Q5. [IF OVERNIGHT] How many nights did you stay in Golden on that trip?

1. None – Day Visit Only
2. Nights: _____
3. Don't know/don't recall
4. Prefer not to answer

Q6. How important were each of the following factors in deciding to visit Golden?

*Please select one response for every row.**

	1 - Not Important At All	2	3	4	5 - Extremely Important	99 Don't Know
Quality of Mountain Biking (excluding KHMR)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Variety of Mountain Biking in Area (excluding KHMR)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kicking Horse Bike Park	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Golden 24 Event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Activities for Non-Mountain Biking Members of Travel Party	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is familiar/I've been there before	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proximity/Close By	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of Accommodations in Area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I Have Friends and Family that Live in Golden	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7. How many DAY trips to Golden did you make between June 1, 2023 and September 30, 2023 that included at least one mountain bike ride?

Please include the trip you completed the initial survey with our onsite interviewer. An estimate is fine.

_____ [VALID ANSWER = 1-100]

Q8. How many OVERNIGHT trips to Golden did you make between June 1, 2023 and September 30, 2023 that included at least one mountain bike ride? Please include the trip you completed the initial survey with our onsite interviewer. An estimate is fine.

_____ [VALID ANSWER = 1-100]

Expenditures: It is very important to understand the economic impact travellers have on their destination. This short section asks about your travel party's expenditures while in Golden.

Q16. First, let's talk about Mountain Biking related expenses. About how much did you and your entire travel party spend on the following items while in Golden on that trip? If you visited more than once, please use the trip where you were intercepted by our interviewer while mountain biking.

- a. Mountain Bike Tickets (i.e. Kicking Horse Bike Park): \$ _____
- b. Mountain Bike Rentals (including safety equipment): \$ _____
- c. Mountain Bike Tour or Guiding Services: \$ _____
- d. Mountain Bike Parts: \$ _____
- e. Mountain Bike Maintenance/Repairs: \$ _____
- f. Shopping/Retail purchases related to Mountain Biking: \$ _____

Q17. In Canadian dollars, what were your travel party's total expenditures while in Golden on that trip?

Please include all purchases, taxes and tips except long-haul flights or car rentals outside of Golden. If you pre-paid any items prior to leaving on your trip (e.g. accommodation, tours, etc.), please include these in your estimate. An estimate is fine.

- ☐ Canadian Dollars: \$ _____ *Go to Q18.*
- ☐ Don't Know *Go to Q19.*
- ☐ Prefer Not to Answer *Go to Q19.*

Q18. Approximately what percentage of your party's total expenditures while in Golden were attributed to the following categories?
























Please enter the appropriate proportions below, excluding long-haul flights. Please insert '0' for those categories you did not spend any money in. The sum of your answers should equal 100%.

___	% on Accommodation (hotels, motels, lodge, camping/RV fees, etc.) <i>IF DAY VISITOR ENTER '0'</i>
___	% on Transportation (vehicle rental, gas, repairs, ferry, taxi, bus, chartered transfer, helicopter etc.)
___	% on Food and Beverage (including taxes and tips)
___	% on Shopping (clothing, gifts, books, etc.)
___	% on Attractions (admission, shows, tours, etc.)
___	% on Outdoor Recreation (park or ski lift pass, guiding services, etc.)
___	% on Other Entertainment (spa, etc.)
___	% on Other Expenditures

Q19. Overall, how satisfied are you with your trip while in Golden?

- ☐ 1 – Very dissatisfied
- ☐ 2 – Somewhat satisfied
- ☐ 3 – Neither satisfied nor dissatisfied
- ☐ 4 – Somewhat satisfied
- ☐ 5 – Very satisfied
- ☐ Prefer not to answer [EXCLUSIVE]

Q20. On a scale of 1 to 5, where 1 is 'very poor' and 5 is 'excellent', please rate your experience of each component of your visit to Golden.

	1 – Very Poor	2	3	4	5 - Excellent	99 Don't know/Prefer not to answer
Accommodation						
Dining						
Recreation and Adventure Opportunities						
Attractions (i.e. Kicking Horse Mountain Resort, Golden Skybridge)						
Local Directional Signage						
Attractiveness along Hwy 1 between east & west entrances to Golden						
Overall Experience in Golden						

ASK ALL SECTION

The Golden Cycling Club welcomes your feedback on the 2023 Mountain Biking season. Please let us know what you think about the following aspects of Golden's trail areas.

Q21. On a scale of 1 to 5, where 1 = Very Unsatisfied and 5 = Very Satisfied, how satisfied are you with the following mountain biking elements while in Golden/Golden area? For this question, please limit your responses to trails within the Golden trail network NOT INCLUDING Kicking Horse Bike Park.

	1 – Very dissatisfi ed	2 – Somewh at dissatisfi ed	3 – Neither Satisfied Nor Dissatisfi ed	4 – Somewh at satisfied	5 – Very satisfied	Don't Know	Not Applic able
Trail Quality	0	0	0	0	0	0	0
Trail Variety	0	0	0	0	0	0	0
Trail Maintenance	0	0	0	0	0	0	0
On-Trail Signage	0	0	0	0	0	0	0
Trail/Network Maps	0	0	0	0	0	0	0
Number of Adaptive Trails (i.e. adaptive trails are specifically designed to accommodate riders using adaptive bikes. Specifications include a range of elements including but not limited to width of trail, running slope, berm radius and slope, and obstacles)	0	0	0	0	0	0	0
Quality of Adaptive Trails	0	0	0	0	0	0	0
Washroom Facilities in Area	0	0	0	0	0	0	0
Picnic/Shelter Options in Area	0	0	0	0	0	0	0
Overall, Mountain Biking in Golden Area	0	0	0	0	0	0	0

Q22. ASK IF VISITED KICKING HORSE BIKE PARK in INTERCEPT OR Q3.5.>0, **Overall, how satisfied are you with your experience at Kicking Horse Bike Park this summer?**

1 – Very dissatisfied

2 – Somewhat satisfied

3 – Neither satisfied nor dissatisfied

4 – Somewhat satisfied

5 – Very satisfied

DID NOT VISIT KICKING HORSE BIKE PARK

Prefer not to answer

Q23. How satisfied are you with the following aspects of Kicking Horse Bike Park?

	1 – Very dissatisfi ed	2 – Somewh at dissatisfi ed	3 – Neither Satisfied Nor Dissatisfi ed	4 – Somewh at satisfied	5 – Very satisfied	Don't Know	Not Applic able
Quality of Runs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Variety of Runs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trail Maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-Mountain Signage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trail/Network Maps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Uploading/Chair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation to/from Resort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rentals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lessons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for Money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24. On a scale of 0 to 10 where 0 is 'Not Likely at All' and 10 is 'Extremely Likely', how would you rate your likelihood to...

	0 - Not Likel y At All	1	2	3	4	5	6	7	8	9	10 - Extre mely Likel y	Prefe r Not to Ans wer
ASK IF VISITOR: Return to Golden for Mountain Biking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recommend Golden as a Mountain Biking Destination to friend, family, or colleagues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ASK IF VISITOR: Recommend Golden as a travel destination or a place to visit to friend, family or	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

colleagues												
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Q25. **What about your trip to Golden led to your {{ Q24c }} out of 10 (Extremely Likely) response? Please be as specific as possible.**

Q26. **How interested are you/would you be purchasing regionally-made mountain bike bikes/parts/gear? For the purposes of this study, 'regionally-made' would include the Kootenay region**

- 1 - Not Interested at All
- 2 - Slightly Interested
- 3 - Moderately Interested
- 4 - Very Interested
- 5 - Extremely Interested
- Don't Know
- Prefer not to Answer

Q27. **Have you heard of the Kootenay Outdoor Recreation Enterprise Initiative or KORE?**

- a. Yes
- b. No

Q28. **How important are each of the following to have locally available in Golden?**

- a. Bike Sales
- b. Bike Repairs and Maintenance
- c. Gear Sales
- d. Lessons
- e. Guides/Tours
- f. Shuttle Services

SCALE:

- 1 – Not Important at All
- 2

- 3
- 4
- 5 – Very Important
- 9 – Prefer Not to Answer

Q29. How satisfied are you with the Mountain Bike-related services available in Golden/Golden area?

- a. Bike Sales
- b. Bike Repairs and Maintenance
- c. Gear Sales
- d. Lessons
- e. Guides/Tours

SCALE:

- 1 – Very dissatisfied
- 2 – Somewhat dissatisfied
- 3 – Neither Satisfied Nor Dissatisfied
- 4 – Somewhat satisfied
- 5 – Very satisfied

- 8 – Not Applicable
- 9 – Prefer Not to Answer

ASK IF RATED A UNDER 3, What specifically are you not satisfied with about Bike Sales in Golden?

ASK IF RATED B UNDER 3, What specifically are you not satisfied with about Bike Repairs and Maintenance in Golden?

ASK IF RATED C UNDER 3, What specifically are you not satisfied with about Gear sales in Golden?

ASK IF RATED D UNDER 3, What specifically are you not satisfied with about Lessons in Golden?

ASK IF RATED E UNDER 3, What specifically are you not satisfied with about Guides/Tours in Golden?

Q30. Did you attend this year's Golden 24 event held June 16-18, 2023?

- a. Yes, as a participant
- b. Yes, as a worker/volunteer
- c. Yes, as a spectator/fan
- d. No

Q31. ASK IF NOT A GCC MEMBER, Are you aware of the Golden Cycling Club?

- a. Yes
- b. No

Q32. ASK IF NOT A GCC MEMBER AND A VISITOR, What would encourage you to donate to the Golden Cycling Club or other clubs where you travel to mountain bike?

Q33. What is one thing the GCC could do to improve your Mountain Biking experience in the Golden area?

Q34. Do you have any other comments/suggestions you would like to share with the Golden Cycling Club?

Finally, just a few questions for statistical purposes...

Q35. **What is the highest level of education you have completed?** *Please select one response.*

- a. Less than high school
- b. High school
- c. Some technical college or university
- d. College or technical diploma
- e. Undergraduate degree
- f. Graduate degree
- g. Other, please specify: _____
- h. Prefer not to say

Q36. **Before taxes, what is your approximate annual household income in Canadian dollars?** *Please select one response.*

- a. \$49,999 or less per year
- b. \$50,000 - \$74,999
- c. \$75,000 - \$99,999
- d. \$100,000 - \$149,999
- e. \$150,000 - \$199,999
- f. \$200,000 - \$249,999
- g. \$250,000 or more
- h. Prefer not to say

You are eligible for a draw to win a one (1) or three (3) pre-paid VISA card valued at \$100, \$150, and \$250 (Canadian Dollars) . In order to enter you, we will need your name and email address. This information will be kept confidential and used only to administer the draw. Would you like to be entered into the draw?

- ☐ Yes
- ☐ No

That completes the survey. Thank you for your time. Your feedback is helpful and appreciated.