



TOURISM BRITISH COLUMBIA
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RESEARCH AND PLANNING

COLUMBIA VALLEY GOLF RESEARCH STUDY RESULTS

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Executive Summary

The purpose of this study was to develop a profile of golfers who visited the Columbia Valley in terms of traveller and trip characteristics.

A multi-location, two-stage survey design was used to achieve the study objectives. Travellers were interviewed at one of eight golf courses to obtain information about the typical golf traveller to the Columbia Valley. On-site interviews collected information from travellers during their trip and a follow-up questionnaire collected information from travellers after their trip. The purpose of the follow-up questionnaire was to gather information about trip motivation, planning, experiences and activities, and to understand travellers' perceptions of the Columbia Valley and British Columbia upon trip completion.

- Between June 1 and September 7 2008, 2,136 people were approached at various golf courses. Five surveys that were barely filled out, and for all practical purposes considered incomplete, were excluded resulting in 2,131 useable surveys. 1,416 agreed to the interview, but 369 were excluded because they were members of the golf club at which they were interviewed. 107 respondents indicated that they had previously completed the survey and were removed from the analysis, resulting in 940 useable surveys.
- Seventy percent of respondents agreed to complete the follow-up survey and 41% of these did so, resulting in 229 useable surveys for analysis.
- Eighty percent of travellers were from Alberta, whereas fewer were from BC (7%), elsewhere in Canada (8%), the US (3%) or from other international countries (2%).
- The majority of golf travellers in the Columbia Valley were between the ages of 35 to 64 years with the most frequently stated age category being 45 to 54 years of age (36%).
- Almost four-fifths (80%) of golf travellers had at least a college or technical diploma, with the most frequently stated education category being a basic university degree (45%).
- While a quarter of travellers (25%) stated explicitly that they preferred not the answer the question on annual household income, half (50%) of the respondents had incomes of at least \$100,000 and another sixth (16%) had incomes between \$65,000 and \$99,999.
- Approximately two-thirds (66%) of respondents were not currently members of a golf club, almost a quarter (25%) were members of a semi-private/public club and just under one-tenth (9%) were members of a private club.

- The majority of travellers interviewed at Columbia Valley golf courses were travelling for leisure purposes (90%), while fewer were travelling to visit friends and family (9%) or for business (1%).
- A majority (97%) of travellers used a car/truck/motorcycle as their primary mode of transportation, whereas fewer travelled in a recreational vehicle (2%) or a bus (<0.5%).
- Over a quarter (29%) of travellers were staying in second homes and over a fifth (23%) were staying in timeshares. Fewer were staying at traditional types of accommodation such as a resort (14%), with friends/relatives (11%) or in a hotel/motel (10%).
- BC residents were more likely to stay at a hotel/motel (26%) than were those from Alberta (9%) or other locations (12%). Alberta residents were more likely to stay in a second home (34%) than were BC residents (10%) or those from other locations (9%); and those from other locations were more likely to stay at a resort (24%) than were BC (12%) or Alberta (13%) residents.
- Golf was the primary trip motivation for the majority (78%) of respondents interviewed. Almost a fifth (18%) did not indicate an activity that as a primary trip motivator whereas the remaining 5% provided a diverse range of motivations that included relaxing, attending a wedding, boating, swimming and water sports.
- The primary destination of the majority of golf travellers (97%) was the Columbia Valley. Very few respondents (2%) were touring with no particular destination whereas the remainder (< 2%) had primary destinations elsewhere in the Kootenay Rockies (1.0%), elsewhere in BC (<0.5%) or in Alberta (<0.5%).
- Overall, the average travel party size was 4.7 people and 26% of travel parties had children. Those parties with children had an average of 6.6 people travelling in their group. Parties travelling without children had an average travel party size of 4.1 people.
- The majority of respondents (91%) had not travelled or planned to travel by air on the trip. Of the 9% who indicated they travelled by air, the overwhelming majority were on return tickets. However, there were differences in the planned arrival and departure cities. The arrival cities mentioned most frequently included Calgary (68%), Cranbrook (13%) and Edmonton (8%). The most common departure cities included Calgary (58%), Cranbrook (11%) and Toronto (10%).
- Travellers planned to spend an average of nine days away from home, including eight days in British Columbia and seven days in the Columbia Valley. Less than one-percent of the travellers (0.9%) indicated that they were just passing through the region.
- The majority (90%) of travellers indicated that golf was their primary leisure activity while in the Columbia Valley. 7% did not have a primary leisure activity whilst the remaining 3% had other leisure activities on which they spent the most time such as boating, relaxing and swimming.

- On average, respondents had taken an average of 3.5 overnight leisure trips over the previous 12 months to purposely play golf. Only one eighth (12%) of respondents did not take a single overnight trip for golf purposes in the previous year.
- Over one third (34%) of respondents played 40 or more rounds of golf in the past year, half (50%) played between 11-39 rounds, a sixth (16%) played between 1-10 rounds whereas a small fraction (<0.5%) did not play a single round of golf in the preceding 12 month period.
- The majority of travellers (84%) spent three weeks or more planning their trip. Reasons for selecting their primary destination included golf (27%), proximity/location (23%), accommodation (14%), prior experience (12%), family (8%), and cost (4%).
- Approximately two-fifths (43%) of travellers spent no more than two weeks pre-planning for the golf component of their trip. Almost half (48%) indicated that the first consideration in planning the golf component of their trip (independent of cost or budget considerations) was the actual destination.
- Previous visits to the Columbia Valley (87%), golf club/resort business websites (55%) and advice from friends/relatives (53%) were the top three information sources used before travel. Also important, but less frequently used information sources included golf resort brochure/travel guide ads (37%) and a local or regional tourism website (24%).
- Previous visits to the Columbia Valley (46%), advice from friends/relatives (30%) and golf resort brochure/travel guide ads (25%) were the top three information sources used during the trip. Also important, but less frequently used information sources included Visitor Centres (15%), golf club/resort business websites (14%) and magazines/newspapers (13%).
- Travellers were asked about leisure activities they participated in during their trip and, not surprisingly, almost all mentioned golf as a leisure activity (99%). The three most frequently cited activities aside from golf were fine dining (64%), visiting a natural hot spring pool (52%) and shopping for local arts and crafts (48%).
- Over three-quarters (77%) of respondents indicated their entire travel party played golf on the trip during which they were interviewed. Activities undertaken by those who did not play golf included swimming (34%), shopping (20%), hiking (6%) and relaxing (6%).
- Travellers were also asked about leisure activities they participated in while on other leisure trips in the past year. Again, the majority of respondents mentioned golf (74%) most frequently as a leisure activity that they participated in while on leisure trips in the past year. Aside from golf, the three most frequently cited activities included fine dining (70%), swimming (53%) and shopping for local arts and crafts (53%).

- The majority of the residents interviewed (89%) had previously golfed in the Columbia Valley. Almost half of the travellers interviewed planned to spend time golfing at the Copper Point (49%) and Eagle Ranch (46%) golf courses. Approximately one-third were planning to golf at Greywolf (36%) or the Springs (33%) whereas fewer were planning to golf at Riverside (29%), Mountainside (24%), Windermere (22%), Radium Resort (22%) or the Ridge at Copper Point (10%). Responses from the follow-up survey show the proportion that actually golfed at each course is higher.
- Over three quarters (77%) of travellers were repeat visitors to the golf course at which they were interviewed. Their average golf party size was 3.8 people; they played an average of almost two rounds of golf at that particular location and almost 4.5 rounds of golf in total over the course of their trip.
- Nearly two-thirds of travellers (61%) reported being very satisfied with their overall experience and a slightly lower proportion (56%) reported high satisfaction with the staff/customer service they received. Overall value for money (32% very satisfied) and cost of green fees (25% very satisfied) received the lowest ratings.
- Travellers were asked how many 9 and 18-hole rounds of golf they played during their visit to the Columbia Valley. Just over a quarter (28%) played at least one 9-hole round of golf and averaged 2.7 rounds during their visit. On the other hand, almost all respondents (99%) reported playing at least one 18-hole round of golf and an average of 4.8 rounds during their trip.
- Less than a tenth of travellers (5%) indicated that a portion of their trip was part of a packaged deal. Of those travellers that had purchased a package, the most common components were green fees (95%), accommodation (86%), meals (7%) and other entertainment (2%) components.
- Almost three-fifths of travellers indicated that their golf tee-time was very (32%) or quite important (27%) to them when choosing to play at the course that they were interviewed and surveyed at.
- Almost one-half (46%) of travellers were inflexible and could not have golfed at any other time of the day.
- Over two-thirds (68%) of respondents were not willing to pay more or less to change their golf tee time.
- Respondents were asked about their satisfaction with their trip in the Columbia Valley. Four-fifths (81%) were very satisfied with their trip. Those who were dissatisfied cited bad weather, limited inexpensive things to do, high costs and poor quality golf course compared to other resorts in the area as reasons for their poor rating.

- Respondents were also asked about their likelihood of recommending the Columbia Valley as a place to visit for family and friends. A majority of respondents indicated that they were either 'very likely' (81%) or 'likely' (16%) to do so.
- Respondents were asked about their likelihood of returning to the Columbia Valley. A large majority (94%) of travellers indicated that they were either 'very likely' (80%) or 'likely' (14%) to return for a future trip.
- Almost three-fifths of respondents (57%) were very satisfied with their overall golf course experience at the golf resort at which they were interviewed. Less than a tenth (8%) of respondents indicated that they were somewhat or very dissatisfied. Reasons provided by these respondents were related to cost, poor course conditions and limited dining opportunities.
- Positive images of the Columbia Valley were dominated by the golf experience (63%), beautiful scenery/landscapes of the region (56%), and weather (34%).
- Negative images of the Columbia Valley region focused heavily on cost considerations (65%), crowding (17%) and distance (14%).
- In terms of likelihood of taking another leisure trip in British Columbia, an overwhelming majority of travellers indicated that they were either 'very likely' (90%) or 'likely' (6%) to take another trip in the next two years.
- Respondents were also asked about their likelihood of taking another leisure trip in British Columbia with the main motivation of the trip being golf. A majority of respondents were 'very likely' (74%) or 'likely' (16%) to visit British Columbia because of golf.
- A variety of characteristics were identified as unique to the area including its scenery (69%), variety of golf course offerings (69%), weather (33%), proximity/accessibility (17%) and mountain golf (14%).
- Travellers at the Columbia Valley golf courses spent an average of \$423.23 per party per day or \$106.51 per person per day. There were notable differences in expenditures when broken down by origin of the travellers, primary accommodation type, travel party size and age.

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Introduction

The purpose of this study was to develop a profile of golfers who visited the Columbia Valley in terms of traveller and trip characteristics. Specifically,

- to determine the specific attributes and appeals of the Columbia Valley golf courses
- to profile golfers who play at the area's courses in terms of traveller and trip characteristics in order to support product development and marketing initiatives.

Methods

A multi-location, two-stage survey design was used to examine the study objectives. Travellers were interviewed at one of eight golf courses to obtain information about the typical golf traveller to the Columbia Valley. On-site interviews collected information from travellers during their trip and a follow-up questionnaire collected information from travellers after their trip. The purpose of the follow-up questionnaire was to gather information about trip motivation, planning, experiences and activities, and to understand travellers' perceptions of the Columbia Valley and British Columbia upon trip completion.

Similar visitor studies conducted in British Columbia have collected information from travellers at a reference site (a place where visitors congregate in the community) in addition to the primary interview site. The purpose of the reference site is to collect information about the typical traveller to the community and build a profile of travellers who are not presently visiting the primary interview site. In this study, data was not collected at a reference site because of feasibility issues associated with potential sites. However, in the past two years, Tourism British Columbia had completed two separate visitor studies in the region that captured general travellers to the area. These reports, (*Value of the Golden Visitor Centre 2007* and the *Fort Steele Heritage Town Visitor Study 2007*) which include a profile of the general traveller to the Golden region and the East Kootenay regions. The full reports of these studies can be found at www.tourismbc.com/research/.

Data Collection - Interview

A team of three interviewers collected data between June 1 and September 7, 2008. For the most part, the interviewers' schedule consisted of a systematic sample of four continuous days of interviewing followed by two days off (Appendix A). However due to the unforeseen difficulty in recruiting adequate number of respondents for the project, extra shifts were added to the original sampling schedule. Shifts were added accordingly to account for accurate representation of weekend versus week day sample days as well as equal dispersion among the eight participating golf courses.

Potential respondents were randomly selected to participate in a face to face interview at the completion of their golf round. Respondents were asked if they were willing to participate in a six to

eight minute interview and were given a complimentary gift (*Super, Natural British Columbia*[®] refrigerator magnet and a 10% discount at the applicable golf shop) for their time if they agreed to participate. Respondents were then asked if they were members of the golf course. If so, they were eliminated from the remainder of the interview ensuring that only non-member travellers were interviewed. Residents of the Columbia Valley region (defined to include the area south of Spillimacheen and north of Canal Flats) were eliminated after a series of demographic and profiling questions. The interviewers recorded responses on handheld computers (Palm Pilots) using Techneos Data Entryware software.

During the interview, questions were asked about (see Appendix B for questionnaires):

- traveller demographics,
- primary trip purpose,
- primary destination,
- primary mode of transportation,
- trip duration,
- length of stay in the Columbia Valley and in British Columbia,
- primary accommodation,
- daily expenditures, and
- golf experience in the Columbia Valley.

In addition, e-mail addresses were collected from those respondents in the interview who agreed to participate in the follow-up questionnaire. A chance to win a golf vacation for two to the Columbia Valley valued at over \$2,500 was used as an incentive to achieve a high participation rate in the follow-up questionnaire.

Between June 1 and September 7th 2008, 2,136 people were approached at eight golf courses in the Columbia Valley (Table 1). Five surveys that were barely filled out, and for all practical purposes considered incomplete, were excluded resulting in 2,131 useable surveys. Of those approached, 1,416 agreed to the interview, while 107 were excluded because they were members of the golf course. 107 respondents who indicated that they had previously completed the survey were also removed from the analysis, resulting in 940 useable surveys (Table 2).

Table 1. Travellers interviewed at golf courses in the Columbia Valley.

Golf Course	Number of Golfers Interviewed	Percentage of Respondents
Greywolf	200	9.4%
Springs @ Radium Resort	212	9.9%
Resort Course @ Radium Resort	322	15.1%
Eagle Ranch	257	12.0%
Copper Point (including Ridge @ Copper Point)	296	13.8%
Windermere Valley	348	16.3%
Mountainside	241	11.3%
Riverside	260	12.2%
Total	2,136	100.0%

Table 2. Travellers surveyed at golf courses in the Columbia Valley.

	Travellers Approached ¹	Agreed to Interview	Previous Respondents	Members	Useable Surveys	Residents	Part of Organized Tour Group
Columbia Valley ²	2,131	1,416	107	369	940	120	28

1. Excludes 5 incomplete surveys.

2. The Columbia Valley region includes the area south of Spillimacheen and north of Canal Flats.

Data Collection - Follow-Up Survey

Those who consented to participate in the follow-up survey via email were sent an email invitation to participate in the survey in October 2008 and were sent subsequently three email reminders. The email survey initially closed on November 30, 2008; however, it was re-opened for one week in early January 2009 in an extra attempt to increase response rates.

The follow-up questionnaire (Appendix B) collected a variety of information including:

- travel party demographics,
- trip duration,
- length of stay in British Columbia,
- primary destination,
- destination decision-making,
- trip motivation,
- trip activities,
- trip planning,
- trip expenditures,
- golf experience,

- positive and negative images of the Columbia Valley,
- unique characteristics of the Columbia Valley as a golf destination,
- satisfaction with the Columbia Valley and British Columbia, and
- the likelihood of returning to the Columbia Valley and British Columbia.

Seventy percent of travellers interviewed at Columbia Valley golf courses agreed to complete the follow-up survey and 41% of these did so by January 4, 2008, resulting in 229 useable surveys for analysis (Table 3).

Table 3. Follow-up survey responses from travellers interviewed at Columbia Valley golf courses.

	Travellers Asked to Participate in Follow-up Survey ¹	Agreed to Complete Follow-up Survey	Bounceback ²	No Response	Useable Follow-up Surveys ¹
Columbia Valley	799	557 (69.7%)	60	268	229 (41.1%)

1. Includes responses from those who were tourists (n=221), business travellers (n=1) or part of a golf tour (n=7). Follow-up survey responses from business travellers and those who were part of a golf tour are not further analysed for the purposes of this report.
2. Bounce back refers to emails sent unsuccessfully to email addresses either due to spam filters or incomplete/inaccurate email addresses.

Data Analysis

Descriptive statistics were used to analyze and summarize results of the report. 'Don't know/No response' answers and responses from business travellers have been excluded from the analyses for all questions unless otherwise noted. For some sections, results are presented by traveller sub-group (e.g. segmented based on traveller demographics or trip characteristics) to examine the difference among sub-groups.

In an effort to provide practical and actionable information to meet stakeholders' operational or marketing needs, this report will focus on practical differences rather than statistically significant differences. The rationale for this approach is that very small and unimportant differences can be found to be statistically significant under certain circumstances. As such, this report typically takes note of where there is a difference of ± 10 percentage points (ppts) or more. In the report's tables, differences that are 10 ppts or more higher than the overall results are highlighted in blue, while differences that are 10 ppt or more lower are shown in red (Figure 1).

The study design produced two sets of data – data from the interview and follow-up questionnaires. The respondents and the responses could vary between the interview and follow-up questionnaires. The respondents could differ because travellers could drop out of the study by not agreeing to complete the follow-up questionnaire or by not completing the follow-up questionnaire even if they had agreed to complete it (which could cause non-response bias). Both instances could cause the follow-up questionnaire results to be unrepresentative of travellers interviewed on-site.

Response biases were assessed to ensure validity of the final results by way of examining practical differences among the aforementioned data sets. Results of these assessments (Appendix C) and several other factors indicated that the interview information is the best source of data when the same or similar questions were asked on both the interview and follow-up questionnaire. Thus, follow-up questionnaire responses were used only when the question was not asked in the interview and when sample sizes permitted. All results presented in the remainder of this report are from the interview unless otherwise noted.

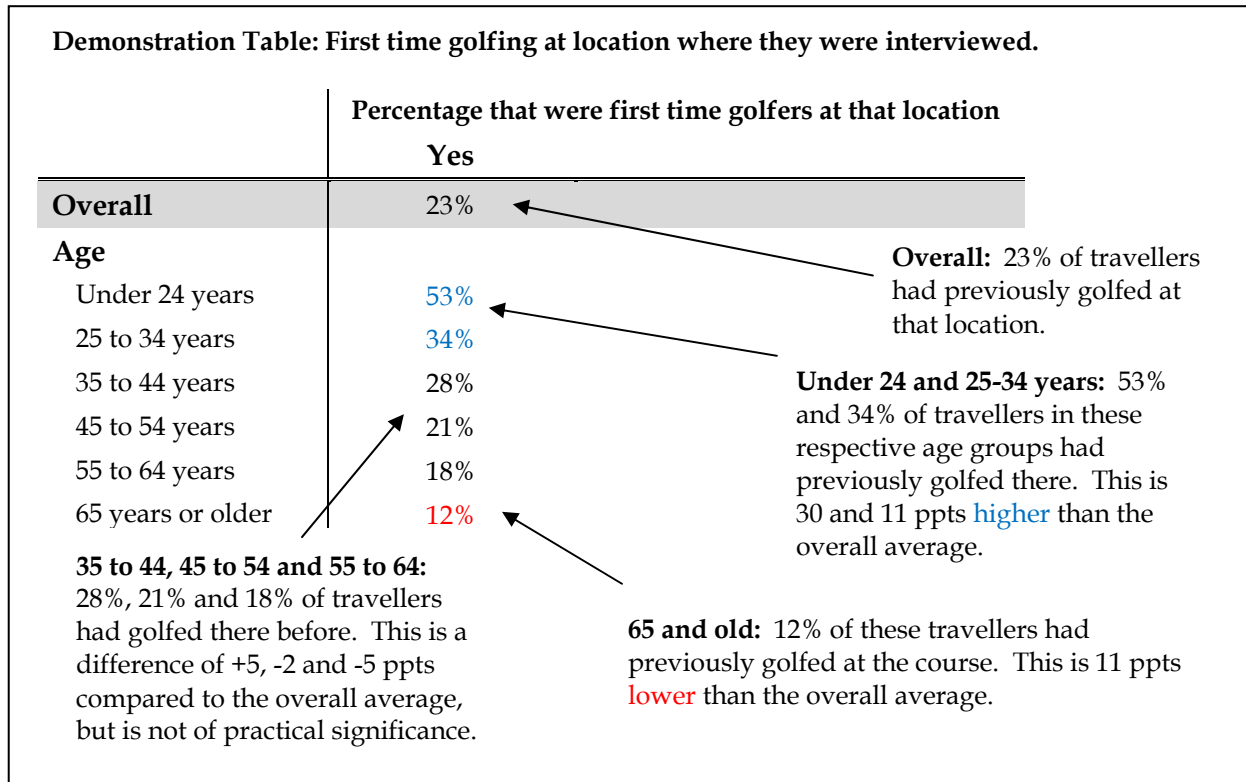


Figure 1. Interpreting the tables. Data is fictitious for illustrative purposes only.

There were three distinct groups of respondents from whom data was collected – tourists, residents and those who were part of an organized golf tour group (Table 4). Although the bulk of the report is based on independent travellers who represent the majority of respondents (84%), the report includes separate sections on residents (13%) and members of organized golf tour groups (3%). Wherever possible, results from the overall sample are included for comparative purposes and to help identify practical differences.

Table 4. Travellers interviewed at golf courses in the Columbia Valley.

Respondent Type	Number of Golfers Interviewed	Percentage of Respondents
Tourists	792	84.3%
Residents	120	12.8%
Tour Group	28	3.0%
Overall	940	100.0%

Results

Characteristics of the Golf Traveller (Demographics)

In the Columbia Valley, 80% of golf travellers were from Alberta, almost a tenth were from other provinces or territories in Canada (8%) or from British Columbia (7%) and fewer still were from the US (3%) or from other International countries (2%, Table 5). Practical differences were observed between the proportion of tourists from BC (7% tourists, 19% overall) and Alberta (80% tourists, 70% overall).

Approximately two-fifths (38%) of Canadian travellers from outside of British Columbia and Alberta originated from Saskatchewan, a similar proportion were from Ontario (37%). A fifth were from Manitoba (20%); whereas, fewer were from Quebec (3%) or Nova Scotia (2%, Figure 2). US travellers from 12 different states were intercepted at Columbia Valley golf courses (Figure 3). One quarter of these US travellers came from Washington (27%) while fewer were from other states such as California (14%), Idaho (9%), Montana (9%) and Pennsylvania (9%, Figure 3). One-third (33%) of travellers from other countries were from the United Kingdom (33%); whereas, another 20% were from Australia (Figure 4).

The majority of golf travellers in the Columbia Valley were between the ages of 35 to 64 years with the most frequently stated age category being 45 to 54 years of age (36%). About a quarter (25%) were between the age of 55 and 64, and another fifth (20%) were between 35 to 44 years of age. Less than a tenth (7%) were over the age of 65. Similarly, less than a tenth (9%) were between 25 to 34 years of age with only 3% of travellers were aged 24 or younger.

Almost four-fifths (80%) of golf travellers had at least a college or technical diploma, with the most frequently stated education category being a basic university degree (45%). The follow-up survey included a question on annual household income and one quarter of travellers (25%) preferred not the answer the question. Of those who responded, over two thirds (68%) had household incomes of at least \$100,000 and another fifth (22%) had incomes between \$65,000 and \$99,999. There were no practical differences with respect to age, education or household income between these travellers and the overall sample (Table 5).

In the follow-up survey, respondents were asked whether they were members of a golf club. Approximately two-thirds (66%) indicated that they did not belong to a golf club; almost a quarter (25%) were members of a semi-private/public club and just under one-tenth (9%) were members of a private club (Table 5). No practical differences were found between these travellers and the overall sample with respect to membership in golf clubs (Table 5).

Table 5. Traveller demographics of tourists interviewed at Columbia Valley golf courses.

	Tourists	Overall²
Origin	(n=792)	(n=940)
British Columbia	7.3%	19.3%
Alberta	79.7%	69.7%
Other Canada	8.3%	7.0%
US	2.8%	2.4%
Other International	1.9%	1.6%
Age¹	(n=772)	(n=916)
Under 24 Years	2.6%	2.4%
25-34 Years	9.1%	8.2%
35-44 Years	20.1%	21.9%
45-54 Years	36.4%	36.5%
55-64 Years	25.4%	24.5%
65 Years or Older	6.5%	6.6%
Education¹	(n=770)	(n=913)
Less Than High School	0.3%	0.2%
High School	12.1%	11.1%
Some Technical, College or University	7.8%	8.7%
College or Technical Diploma	22.9%	25.8%
University Degree	45.2%	43.3%
Masters or a PhD Degree	11.8%	11.0%
Annual Household Income¹	(n=220)	(n=225)
<i>Prefer not to answer this question</i>	24.8%	24.7%
Less than \$25,000	1.8%	1.8%
\$25,000 to \$49,999	3.6%	3.5%
\$50,000 to \$64,999	4.8%	4.7%
\$65,000 to \$99,999	21.7%	21.8%
\$100,000 to \$149,999	34.3%	34.7%
\$150,000 or more	33.7%	33.5%
Member of a Golf Club¹	(n=220)	(n=225)
Yes - Private Club	9.1%	8.9%
Yes - Semi-Private/Public Club	24.5%	24.9%
Not a Member	66.4%	66.2%

1. Business travellers have been excluded.

2. Includes local residents and tour group travellers.

Origin of Canadian Travellers From Outside of BC and Alberta by Province

Where are you from?

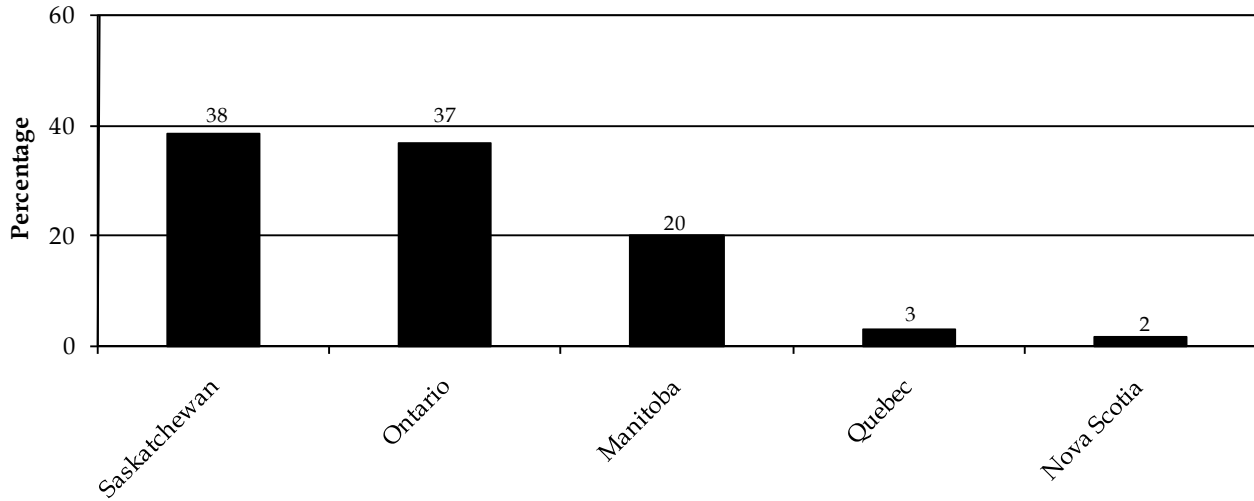


Figure 2. The percentage of travellers from provinces outside of British Columbia at Columbia Valley golf courses (n=65).

Origin of U.S. Travellers by State

Where are you from?

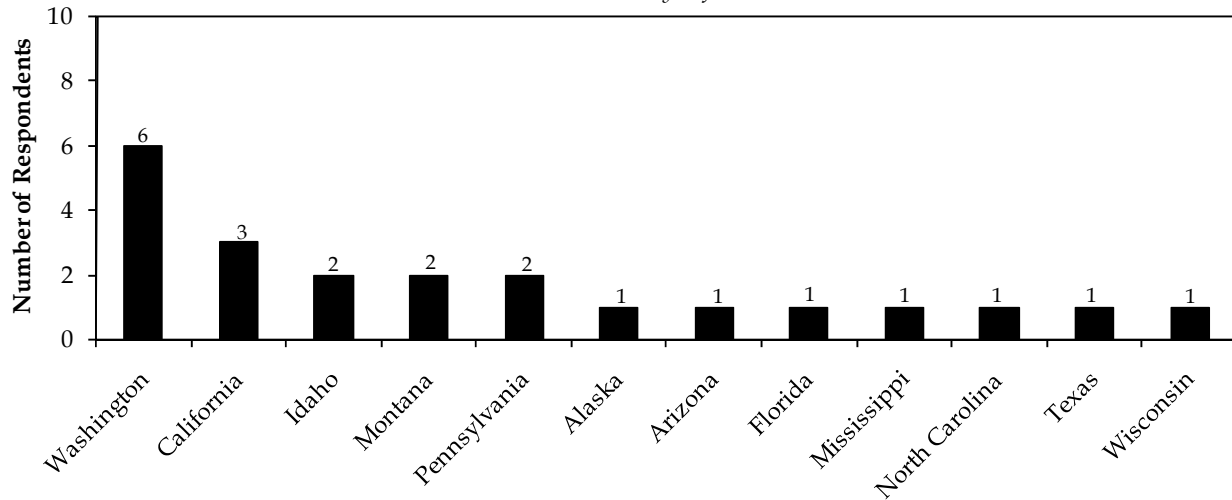


Figure 3. Number of US travellers from each state at Columbia Valley golf courses (n=22).

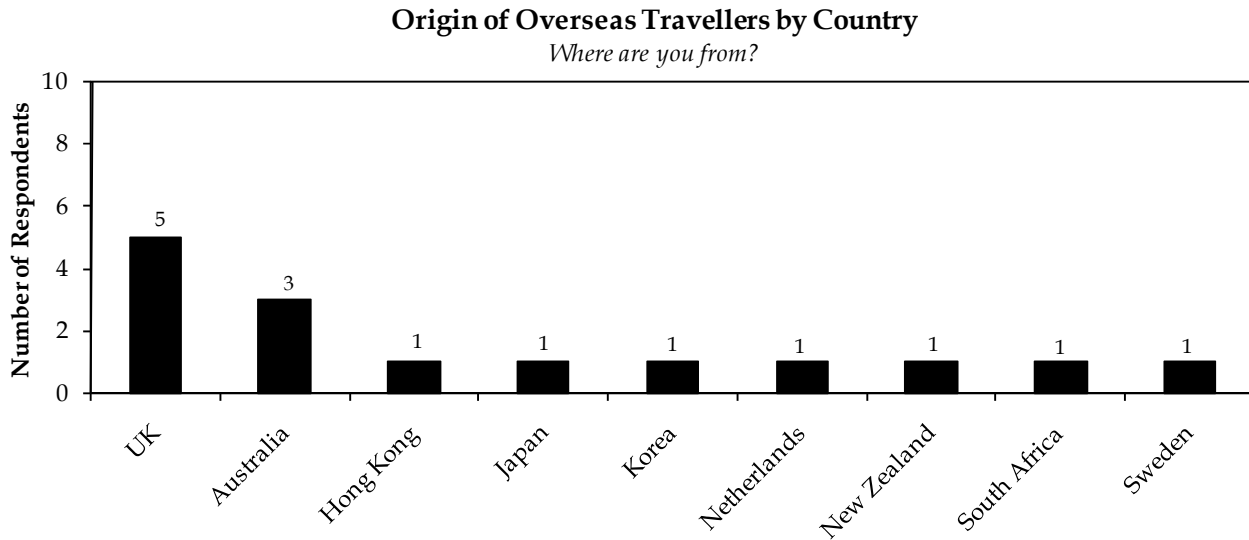


Figure 4. Number of travellers from countries other than Canada and the US at Columbia Valley golf courses (n=15).

Trip Characteristics

There were no practical differences between these travellers and the overall sample with respect to primary trip purpose, mode of transportation and primary accommodation.

The majority of travellers interviewed at Columbia Valley golf courses were travelling for leisure purposes (90%) while considerably fewer were visiting friends and family (9%) or travelling for business (1%, Table 6). Alberta residents were more likely to be travelling for leisure (92%) than were BC residents (86%) or those from other locations (77%). On the other hand, visitors from other locations were much more likely to be visiting family and friends (21%) than were residents of Alberta (7%) or BC (12%, Table 7).

The majority of travellers (97%) were using a car/truck/motorcycle as their primary mode of transportation; fewer were travelling by RV/Camper (2%) or by bus (0.4%, Table 6). Alberta residents were slightly more likely to be using a RV (3%) than were those from other locations (1%) or from BC (0%). BC residents were slightly more likely to be using a bus (2%) than were those from Alberta (<0.5%) or from other locations (0%, Table 7).

Over a quarter (29%) of golf travellers were staying in a second home, while an additional fifth (23%) were staying at a timeshare. Just over a tenth of golf travellers stayed at a resort (14%), with friends or relatives (11%) or at a hotel/motel (10%, Table 6) which are normally more traditional forms of accommodation (Table 7).

Primary trip purpose, mode of transportation and primary accommodation were further analyzed by market origin to identify the existence of practical differences based on residency. The results show

that visitors from BC were more likely to stay at a hotel/motel (26%) than were those from Alberta (9%) or other locations (12%); while Alberta residents were more likely to stay in a second home (34%) than were BC residents (10%) or those from other locations (9%). Those from other locations were more likely to stay at a resort (24%) than were BC (12%) or Alberta (13%) residents (Table 7). In terms of practical differences when compared to the overall sample, those from other locations were less likely to be travelling for leisure (77% vs. 90% overall), more likely to be travelling to visit family and friends (21% vs. 9% overall) and less likely to be using a second home for accommodation (9% vs. 29% overall); BC residents were more likely to be using a hotel/motel (26% vs. 10% overall) and less likely to be using a second home for their accommodation (10% vs. 29% overall, Table 6).

Table 6. The primary trip purpose, mode of transportation and primary accommodations of BC resident and Non-BC resident travellers interviewed at Columbia Valley golf courses.

	Percentage of Travellers by Residence			
	BC	Alberta	Other	Total
Primary Trip Purpose	(n=58)	(n=631)	(n=103)	(n=792)
Leisure	86.2%	92.2%	76.7%	89.8%
Visiting Friends & Family	12.1%	6.5%	21.4%	8.8%
Work/Business Activity	1.7%	1.1%	1.9%	1.3%
Other ¹	0.0%	0.2%	0.0%	0.1%
Mode of Transportation²	(n=57)	(n=623)	(n=100)	(n=780)
Car/Truck/Motorcycle	98.2%	97.0%	99.0%	97.3%
RV/Camper	0.0%	2.7%	1.0%	2.3%
Bus	1.8%	0.3%	0.0%	0.4%
Bicycle	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.0%	0.0%	0.0%
Primary Accommodations²	(n=51)	(n=621)	(n=100)	(n=772)
Hotel/Motel	25.5%	8.7%	12.0%	10.2%
Campground/RV	5.9%	7.7%	3.0%	7.0%
Friends OR Relatives	13.7%	9.2%	18.0%	10.6%
Other ³	0.0%	0.2%	0.0%	0.1%
B&B	3.9%	1.0%	1.0%	1.2%
Resort	11.8%	12.7%	24.0%	14.1%
Timeshare	23.5%	23.0%	24.0%	23.2%
Second Home	9.8%	34.1%	9.0%	29.3%
Rental House/Condo	5.9%	3.4%	9.0%	4.3%

1. Other trip purpose included second home (n=1).

2. Business travellers have been excluded in the table.

3. Other accommodation responses include passing through (n=1).

Golf was the primary trip motivation for the majority (78%) of respondents interviewed. Almost a fifth (18%) did not have a primary motivation. For the travellers who indicated that golf was not the primary trip motivator, 38 respondents (5%) provided a diverse range of motivations that included relaxing, attending a wedding, boating, swimming and water sports (Table 7).

Table 7. The primary motivation for this trip.

Primary Motivation	Tourists (n=780)	Overall (n=808)
None	17.6%	17.1%
Golf	77.6%	78.2%
Other ¹	4.9%	4.7%

1. Other includes relax (5), boating (4), wedding (3), cottage (2), lake (2), swimming (2), vacation (2), water sports (2), adventure activities, all activities, beach, camping, church, drinking, explore BC, get together, getting away, holidays, place here, pools, tri, visit family, wine tour and yard work.

The primary destination of the majority of golf travellers (97%) was the Columbia Valley. Very few respondents (2%) were touring with no particular destination whereas the remainder (< 2%) had primary destinations in other parts of the Kootenay Rockies (1%), Alberta (0.3%) or elsewhere in BC (0.1%). There were no practical differences between these travellers and the overall sample (Table 8).

Table 8. Primary destination of golf travellers (place where spend the most time).

Primary Destination	Percentage of Travellers ¹	
	Tourists (n=780) ²	Overall (n=807) ³
None, touring	1.8%	2.0%
Columbia Valley	96.8%	96.5%
<i>Invermere</i>	18.6%	18.5%
<i>Fairmont Hot Springs</i>	30.3%	30.1%
<i>Radium Hot Springs</i>	22.1%	22.4%
<i>Columbia Valley (unspecified)</i>	9.5%	9.3%
<i>Panorama</i>	9.5%	9.5%
<i>Windermere</i>	6.7%	6.4%
<i>Canal Flats</i>	0.3%	0.2%
Other Kootenay Rockies	1.0%	1.0%
Other BC	0.1%	0.1%
Alberta	0.3%	0.2%

1. Business travellers have been removed from the analysis.
2. Other Kootenay Rockies includes Cranbrook (n=2), Golden (n=2), Kimberly (n=3) and Kokanee Springs (n=1); other BC includes Christina Lake (n=1). Alberta includes Calgary (n=1) and Lake Louise (n=1).
3. Other Kootenay Rockies includes Kimberly (n=1).

The average travel party size was 4.7 people and only 26% of travel parties were travelling with children. Travel parties that included children tended to be substantially larger than those travelling without children. Those parties that travelled with children had, on average, 6.6 people travelling in their group. Among those travelling without children, the average travel party size was 4.1 people.

There were no practical differences with respect to proportion of children or party sizes between these travellers and the overall sample (Table 9).

Table 9. Traveller demographics of tourists interviewed at Columbia Valley golf courses.

	Tourists	Overall
<u>Average Travel Party Size¹</u>	<u>Number</u>	<u>Average</u>
Overall (n=772, 799)	4.72	4.94
<i>Median</i>	4.00	4.00
Parties without children (n=568, 589)	4.06	4.35
<i>Median</i>	3.00	3.00
Parties with children (n=204, 210)	6.57	6.60
<i>Median</i>	6.00	6.00
Proportion with Children (n=772, 799)¹	26.4%	26.3%

1. Business travellers have been excluded.

The majority of respondents (91%) had not travelled or planned to travel by air on the trip they were intercepted on. Of the 9% of air travellers, the majority planned on using air as well for their return trip. The arrival cities mentioned most frequently by these air travellers included Calgary (68%), Cranbrook (13%) and Edmonton (8%). The departure cities mentioned most frequently included Calgary (58%), Cranbrook (11%) and Toronto (10%). There were no practical differences between these travellers and the overall sample (Table 10).

Table 10. Travelled or planning to travel by air on this trip.

Air Travel (Actual/Planned)	Tourists (n=780)
Yes - return trip ^{1,2}	9.2%
Yes - one way in ^{1,2}	0.0%
Yes - one way out ^{1,2}	0.1%
No	90.6%

1. City flown into: Calgary (68%), Cranbrook (13%), Edmonton (8%), Spokane (3%), Toronto (3%), Vancouver (3%), Los Angeles (1%) and Victoria (1%).
2. City flown out of: Calgary (58%), Cranbrook (11%), Toronto (10%), Edmonton (7%), Spokane (4%), Vancouver (4%), Kelowna (3%), London (3%) and Montreal (1%).

Less than one percent (0.9%) of the travellers interviewed indicated that they were just passing through the Columbia Valley. Travellers planned to spend an average of nine days away from home, including eight days in British Columbia and seven days in the Columbia Valley. There were no practical differences between these travellers and the overall sample of respondents (Table 11).

Table 11. Trip duration.¹

	Tourists	Overall
No time in region - Passing through (n=772, 799)	0.9%	0.9%
Average days in the Region ² (n=765, 792)	7.20	7.16
<i>Median</i>	6.00	5.00
Average days in British Columbia (n=772, 799)	8.04	8.00
<i>Median</i>	6.00	6.00
Total days away from home ³ (n=780, 807)	8.66	8.62
<i>Median</i>	7.00	7.00

1. Business travellers have been excluded in this table.

In comparing trip length by market origin, other international visitors took considerably longer trips and spent notably more time away from home (26 days on average) than did travellers from any other origin. Other international visitors also spent considerably more time travelling in British Columbia (12 days on average) than did those from BC, Alberta, elsewhere in Canada or the US (Figure 5).

Average Days Spent Away From Home and in British Columbia by Travellers to the Columbia Valley

*How many days will you be away from home?
How many days will be spent in British Columbia?
How many of those days will be spent in the Columbia Valley?*

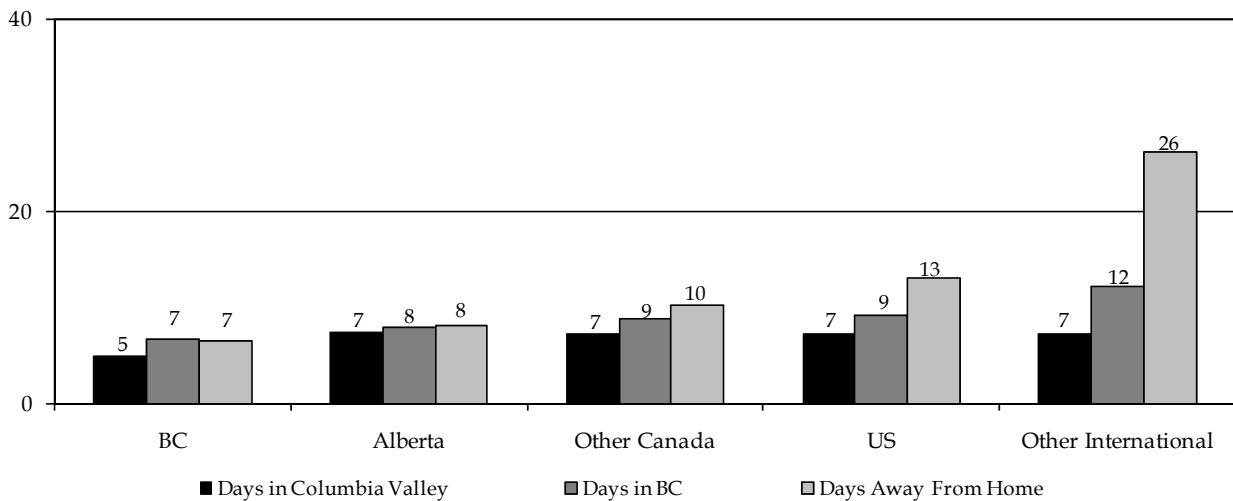


Figure 5. The average number of days spent away from home, in British Columbia and in the region by traveller origin (n=780 days away from home; n=772 days in BC; n=765 days in Columbia Valley).

The majority (90%) of travellers indicated that golf was their primary leisure activity while in the Columbia Valley. Of the travellers intercepted, only 7% did not have a primary leisure activity whilst the remaining 3% indicated other leisure activities such as boating, relaxing and swimming. There

were no practical differences between these travellers and the overall sample of respondents (Table 12).

Table 12. Primary (most time spent) leisure activity while in the Columbia Valley.

Primary Leisure Activity	Tourists (n=760)
None	6.8%
Golf	89.7%
Other ¹	3.4%

1. Other includes boating (5), relaxation (3), swimming (3), camping (2), pool (2), water sports (2), at the lake, beach, family reunion, fishing, get together, hot tub, pools, reading and yard work.

On average, golf travellers had taken 3.5 trips over the previous 12 months to purposely play golf. This was slightly higher than the overall average of 3.3 trips but not enough to be considered a practical difference. The most frequent response was two annual overnight golf trips (21%), one eighth (12%) of respondents did not take a single overnight trip for golf purposes in the previous year. There were no practical differences between these travellers and the overall sample (Table 13).

There were distinct sub-groups with respect to rounds of golf played in the previous year. Over one third (34%) were "high-rounders" who played 40 or more rounds of golf annually. Approximately half (50%) were "intermediary rounders" who played between 11-39 rounds followed by almost one sixth (16%) of "low rounders" who only played between 1-10 rounds of golf in the previous year. A small fraction (<0.5%) did not play a single round of golf in the preceding 12 month period.

Table 13. Number of overnight trips taken in last 12 months to purposely play golf and total rounds of golf played.

	Tourists	Overall
Total Overnight Golfing Trips	(n=758)	(n=902)
0	12.1%	13.5%
1	17.4%	17.6%
2	21.4%	22.2%
3	18.9%	17.6%
4	10.6%	10.6%
5	5.1%	5.2%
6	4.7%	4.3%
7-10	6.5%	5.7%
11 or more	3.3%	3.2%
Average	3.47	3.31
Median	2.00	2.00
Total Rounds of Golf Last Year	(n=769)	(n=913)
0	0.3%	0.2%
1-5	4.6%	4.4%
6-10	11.1%	11.7%
11-20	24.1%	25.5%
21-39	25.6%	26.6%
40-59	17.8%	16.0%
60+	16.6%	15.6%

Trip Planning

Travellers were asked about their trip planning in the follow-up survey. An overwhelming majority (84%) of golf travellers spent three or more weeks planning their trip, with the most common planning horizon being greater than 13 weeks (41%; Table 14).

The follow-up survey also asked these travellers about reasons for selecting their primary destination. Fifty-two respondents provided reasons for selecting their primary destination. The most frequent responses included golf (27%), proximity/location (23%), accommodation (14%), prior experience (12%), family (8%), and cost (4%, Table 14).

Follow-up survey respondents were asked if they had considered other destinations or routes in planning their trip. Over one-fifth (23%) of respondents had thought of 49 other destinations, the majority of which were outside the Columbia Valley (98%). Looking at it from a regional perspective, these included destinations in the Kootenay Rockies regions (25%), the US (25%), Alberta (16%), the Thompson Okanagan (14%), Vancouver Island (12%), other Canadian provinces (4%) and other international locations (4%, Table 14).

Table 14. Overall trip and golf component planning horizons.

	Tourists
Pre-planning for Trip	(n=215)
Day of Departure	0.0%
1-6 Days	4.7%
1-2 Weeks	11.6%
3-8 Weeks	27.9%
9-12 Weeks	14.9%
13 Weeks+	40.9%
Reasons for Choosing Primary Destination over Alternatives	(n=52)
Prior experience	11.5%
Proximity/Location	23.1%
Cost	3.8%
Family	7.7%
Golf	26.9%
Accommodation (Time Share/Second Home)	13.5%
Other ¹	13.5%
When planning this trip, considered other destinations or routes	(n=218)
Yes	22.5%
No	77.5%
Other Destinations Considered	(n=49)
In Columbia Valley Region	2.0%
Elsewhere	98.0%
Other Destinations Considered (detailed)	(n=49)
Vancouver Island	12.2%
Thompson Okanagan	14.3%
Kootenay Rockies	24.5%
Alberta	16.3%
Other Canada	4.1%
US	24.5%
Other World	4.1%

1. Other includes 'better match for time and events being attended', 'friend's reference', 'had not been thru the area for 20 years', 'never been there and wanted to see it', 'wanted to be in the mountains', 'weather' and 'wedding that week at Panorama'.

When it came to pre-planning for the golf component of their trip, the responses were more evenly distributed. Nearly a third (29%) planned their golf component 9 or more weeks in advance, while an additional 29% planned it 3-8 weeks prior to the start of the trip. Over two-fifths (43%) planned it within a couple of weeks of departure (between day of departure and 2 weeks), including 6% of travellers who planned their golf component on their actual day of departure (Table 15).

Almost half (48%) of all golf travellers indicated that their first consideration in planning the golf component of their trip (independent of cost or budget considerations) was the actual destination itself. Over a quarter (30%) considered the golf first and then went about finding a suitable destination. One tenth (10%) considered something other than the golf trip or destination, 8% had someone else look after the trip planning process while only a small handful (4%) made their decisions based upon package deals they went looking for (Table 15).

Table 15. Golf component pre-planning and preliminary considerations.

	Tourists
Pre-planning for Golf Component	(n=218)
Day of Departure	5.5%
1-6 Days	19.3%
1-2 Weeks	17.9%
3-8 Weeks	28.9%
9-12 Weeks	11.5%
13 Weeks+	17.0%
First Consideration When Planning the Golf Component of Your Trip (apart from cost or budget)	(n=217)
Thought about the destination and then thought about golfing and other activities	48.4%
Started by considering a golf trip and then started thinking about a destination	30.0%
Looked for package deals without considering any destinations, activities or travel experiences	3.7%
Someone else planned the trip	7.8%
Considered something else first	10.1%

Travellers were asked what information sources they used before their trip. Previous visits to the Columbia Valley (87%), golf club/resort websites (55%), advice from friends/relatives (53%) and golf resort brochure/travel guide ads (37%) were among the top information sources used before travel. One quarter (24%) used a local or regional tourism website. Less frequently used information sources included magazines/newspapers (18%), other websites (15%), Visitor Centres (13%), golf shows (12%), referrals from tourism businesses (7%) and www.HelloBC.com (6%, Figure 6).

Percentage of Travellers Using Each Information Source Before Their Trip

What information sources did you use to plan your trip?

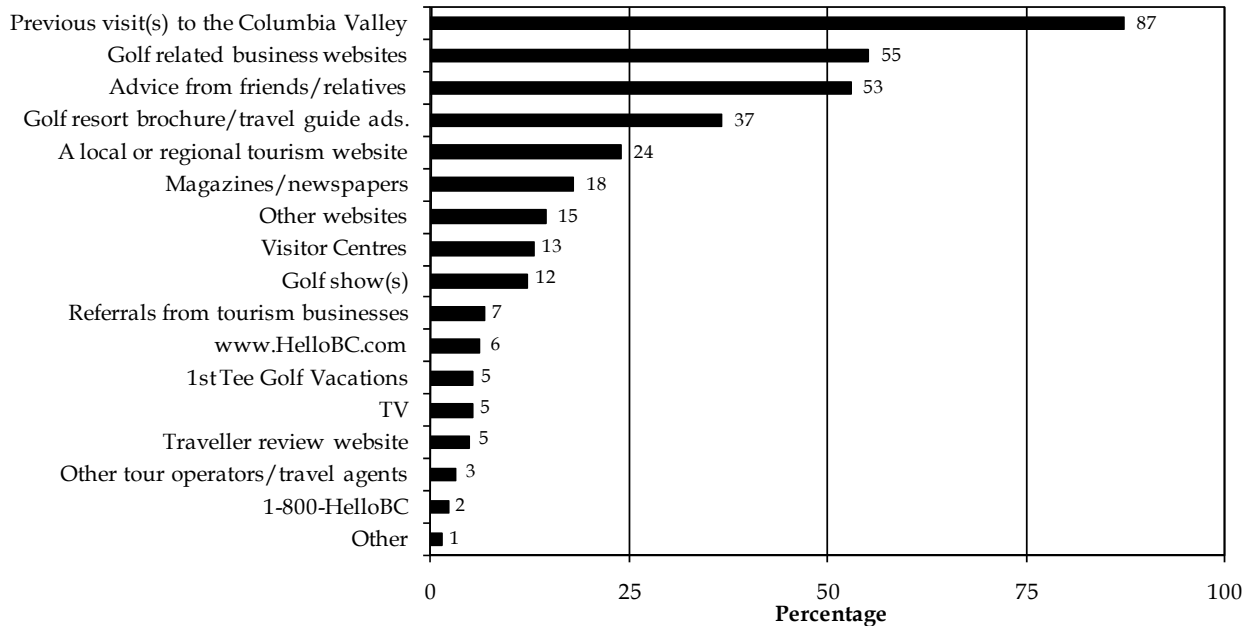


Figure 6. The percentage of travellers using each information source before their trip (n=221). Percentages add to more than 100% because travellers could use more than one information source before their trip.

The three information sources that travellers reported finding most useful before their trip were experience gleaned from previous visits to the Columbia Valley (70%), advice from friends/relatives/acquaintances (43%) and business websites for the golf club or resort www.ColumbiaValleyGolf.com (43%).

Travellers were also asked what information sources they used during their trip. A previous visit to the Columbia Valley was the top information source used during travel as listed by 46% of respondents. Also important, but less frequently used during travel were advice from friends and relatives (30%), golf resort brochure/travel guide ads (25%), Visitor Centres (15%), golf club/resort business websites (14%) and magazines/newspapers (13%). Other less frequently mentioned information sources included referrals from tourism businesses (7%), local or regional tourism website (7%), other websites (5%) or TV (4%, Figure 7).

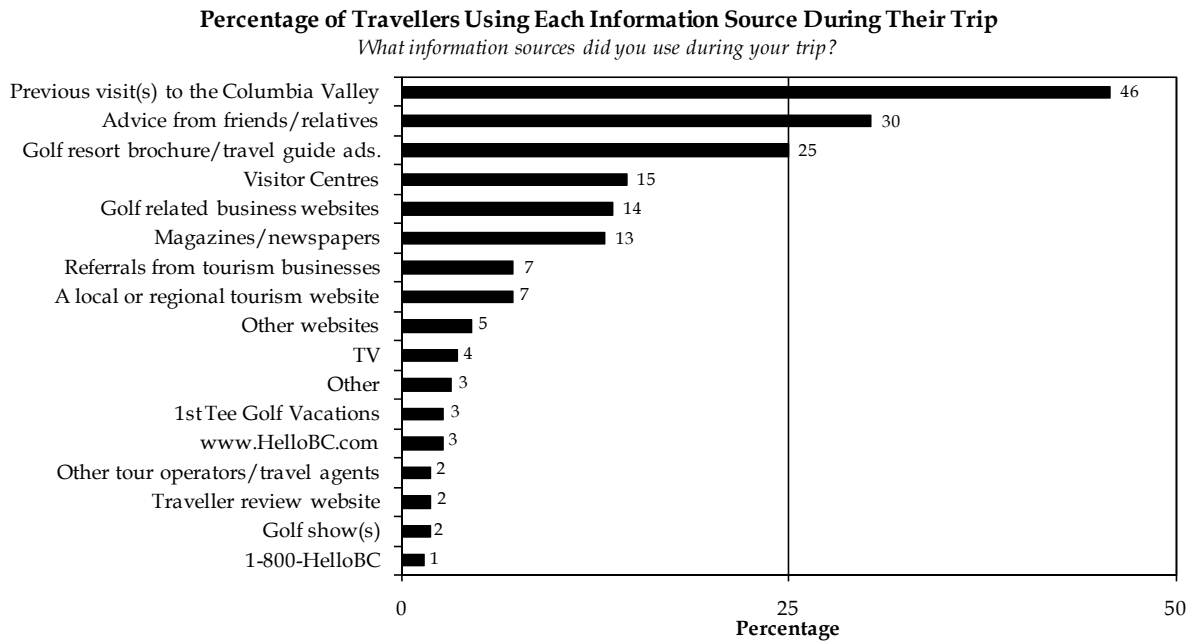


Figure 7. The percentage of travellers using each information source during their trip (n=221). Percentages add to more than 100% because travellers could use more than one information source during their trip.

Traveller Activities

In the follow-up survey, travellers were asked about leisure activities they participated in during their trip. Aside from golf, the most frequently cited activities by those interviewed at Columbia Valley golf courses included fine dining (64%), natural hot spring (52%), shopping for local arts and crafts (48%), swimming (46%), visiting friends/relatives (44%), hiking/climbing (29%) and wildlife viewing (26%, Table 16).

Travellers were also asked about activities they participated in while on other leisure trips in the past year. The most frequently cited activities included golf (74%), fine dining (70%), swimming (53%), shopping for local arts and crafts (53%), visiting friends and relatives (50%), natural hot spring (41%), hiking/climbing (37%), family attractions (35%), visiting municipal/ provincial/national parks (31%), visiting a museum, heritage or historic site (29%) and visiting a winery/brewery or cidery (29%, Table 16).

Table 16. Participation in activities by respondent and/or travel party while on this trip and other leisure trips in the past year.

Participation in Activity	Participate on this Trip (n=221)	Other Leisure Trips (n=221)
Golfing	99.1%	74.2%
Participating in fine dining	64.3%	69.7%
A natural hot spring pool	51.6%	41.2%
Shopping for locals arts and crafts	48.4%	52.9%
Swimming	45.7%	53.4%
Friends and/or relatives	44.3%	50.2%
Hiking/Climbing	29.4%	36.7%
Wildlife viewing (whale, bear, birds, etc.)	26.2%	24.9%
Family attraction (mini golf, zoo, etc.)	22.6%	35.3%
Municipal, provincial, or natural area outside a park	22.6%	30.8%
Boating (other than Kayaking/canoeing)	14.9%	23.5%
Museum, heritage, or historic site	14.5%	29.0%
A spa	12.7%	20.4%
Attending a festival, fair or exhibition	11.8%	24.9%
Visiting a winery, brewery, or cidery	11.3%	29.0%
City or municipal facility (swimming pool, performing arts centre etc.)	11.3%	23.1%
Mountain biking	6.3%	8.1%
Fishing	6.3%	16.3%
Cycling (other than mountain biking)	5.4%	9.0%
Kayaking/canoeing	5.4%	10.0%
Horseback riding	3.2%	9.0%
Rock climbing	1.8%	3.2%
First Nations attraction or event	1.4%	5.0%
Other ¹	10.0%	10.0%

1. 'Other' activities included attended a wedding atop a mountain, camping, casino (3), casual dining, checked out the store that we are part owners in, Invermere triathlon, motorcycle touring, off-roading in a 4 wheel drive, paragliding, playing cards, walking, rafting/helicopter ride, sightseeing (2), tennis, water Skiing, went to Banff Lake Louise as a day trip, white water rafting (2) and zip-lining in Sooke.

In the follow-up survey, over three-quarters (77%) of respondents indicated that their entire travel party played golf on the trip during which they were interviewed. The most frequently cited activities undertaken by those who did not play golf included swimming (34%), shopping (20%), hiking (6%) and relaxing (6%, Table 17).

Table 17. Participation in activities by respondent and/or travel party while on the trip.

	Tourists	Overall
Entire travel party played golf on the trip	(n=221)	(n=226)
Yes	76.5%	76.1%
No	23.5%	23.9%
Activities undertaken by those NOT playing golf	(n=50)	(n=52)
Swimming	34.0%	32.7%
Shopping	20.0%	23.1%
Hiking	6.0%	5.8%
Relaxation	6.0%	5.8%
Babysat/Children's Activities	4.0%	3.8%
Read	4.0%	3.8%
Spa	4.0%	3.8%
Visit Friends/Family	4.0%	3.8%
Biking	2.0%	1.9%
Camping	2.0%	1.9%
Massage	2.0%	1.9%
Off-roading	2.0%	1.9%
Quading	2.0%	1.9%
Sightseeing	2.0%	1.9%
Soaring	2.0%	1.9%
Tennis	2.0%	1.9%
Walk	2.0%	1.9%

Travel to the Columbia Valley

The majority of the residents interviewed (89%) had previously golfed in the Columbia Valley. Almost half of the travellers interviewed planned to spend time golfing at the Copper Point (49%) and Eagle Ranch (46%) golf courses. Approximately one-third were planning to golf at Greywolf (36%) or the Springs (33%) whereas fewer were planning to golf at Riverside (29%), Mountainside (24%), Windermere (22%), Radium Resort (22%) or the Ridge at Copper Point (10%, Table 18).

Table 18. First time golfing in the Columbia Valley and golf course visitation intent.

	Tourists	Overall
First Time Golfing in the Columbia Valley	(n=777)	(n=924)
Yes	11.5%	9.8%
No	88.5%	90.2%
Golf Course	(n=779)	(n=926)
The Springs	33.0%	32.6%
Radium Resort	22.0%	23.8%
Eagle Ranch	45.8%	44.1%
Greywolf	36.2%	34.7%
Copper Point	49.3%	50.1%
Windermere	22.3%	26.9%
Mountainside	23.9%	24.0%
Riverside	29.3%	29.4%
Other	10.3%	9.0%

In the original interview, respondents were asked about the courses they had golfed at, or planned to golf at, during their trip. In the follow-up survey, respondents were asked about the courses they golfed at during their trip. Copper Point (55%), Eagle Ranch (47%) and Greywolf (43%) were the golf courses visited most frequently. It is noteworthy that when compared to stated intent, higher visitation levels were reported for almost every golf course. Practical differences were found to exist between actual and planned visitation at Radium Resort (22% planned, 34% actual, Table 19)

Over three quarters (77%) of travellers were repeat visitors to the golf course at which they were interviewed. Their average golf party size was 3.8 people; they played an average of almost two rounds of golf at that particular location and almost 4.5 rounds of golf over the course of their trip.

Table 19. Columbia Valley golf courses - intended vs. actual visitation.

	Planned to Golf	Actually Golfed
Golf Course	(n=779)	(n=221)
Copper Point	49.3%	54.8%
Eagle Ranch	45.8%	46.6%
Greywolf	36.2%	42.5%
The Springs	33.0%	42.1%
Riverside	29.3%	36.2%
Radium Resort	22.0%	33.5%
Mountainside	23.9%	33.0%
Windermere	22.3%	22.6%

Nearly two-thirds of golf travellers (61%) reported being very satisfied with their overall experience and a slightly lower proportion (56%) reported high satisfaction with the staff/customer service they received. Overall value for money (32% very satisfied) and in particular cost of green fees (25% very satisfied) represents potential areas of concern for these travellers. It is noteworthy that there were no practical differences found in these reported satisfaction levels which suggests that these concerns permeate with all golfers interviewed in this study (Table 20).

Table 20. First time golfing at location, golf party size, rounds played at location and on trip and satisfaction levels.

	Tourists	Overall
First Time Golfing At This Location	(n=765)	(n=912)
Yes	22.7%	19.6%
No	77.3%	80.4%
Average Golf Party Size (today)	3.75	4.01
<i>Median</i>	3.00	3.00
Average Rounds of Golf Played at this Location	1.68	2.03
<i>Median</i>	1.00	1.00
Average Rounds of Golf Played on this trip	4.41	4.42
<i>Median</i>	4.00	4.00
Percentage who were Very Satisfied with:		
Overall Experience	60.5%	58.1%
Staff/Customer Service	56.3%	52.0%
Cost of Green Fees	24.7%	23.8%
Food and Beverage Services	35.3%	30.8%
Quality of Course	44.3%	41.0%
Overall Value for Money	32.4%	29.2%

In the follow-up survey, travellers were also asked how many 9 and 18-hole rounds of golf they played during their visit to the Columbia Valley. Just over a quarter (28%) of follow-up survey respondents played at least one 9-hole round of golf and those that did played an average of 2.7 rounds during their visit. The majority (99%) of follow-up survey respondents reported playing at least one 18-hole round of golf and those that did played an average of 4.8 rounds during their visit (Table 21).

Table 21. # of 9 and 18 hole rounds of golf played during trip to the Columbia Valley.

	Tourists	Overall
Proportion of follow-up respondents playing 9 hole rounds	27.6%	28.3%
Number of 9 hole rounds	(n=61)	(n=64)
1	45.9%	45.9%
2	26.2%	26.6%
3	3.3%	3.1%
4	8.2%	7.8%
5	6.6%	6.3%
6-10	9.8%	9.4%
Average	2.66	2.59
<i>Median</i>	2.00	2.00
Proportion of follow-up respondents playing 18 hole rounds	99.1%	98.7%
Number of 18 hole rounds	(n=219)	(n=223)
1	7.3%	7.2%
2	16.9%	17.0%
3	20.5%	20.6%
4	16.4%	17.0%
5	8.7%	8.5%
6	8.7%	8.5%
7	5.9%	5.8%
8-10	15.5%	15.2%
Average	4.75	4.73
<i>Median</i>	4.00	4.00

The majority of travellers (95%, Table 22) indicated that the current round of golf (during which they were intercepted was on) was not part of a golfing package. Those who were part of golf packages (5%) likely did so because of the inclusion of green fees (95%), accommodation (86%), and to a lesser extent meals (7%) and other entertainment components (2%, Table 22).

Table 22. Golf package usage and package components.

	Tourists
Current Round of Golf Part of a Golfing Package	(n=776)
Yes	5.4%
No	94.6%
Package Components	(n=42)
Accommodation	85.7%
Air Transportation	0.0%
Meals	7.1%
Rental Car	0.0%
Other Transportation	0.0%
Rental Clubs	0.0%
Spa Treatments	0.0%
Other Entertainment	2.4%
Lessons	0.0%
Green Fees	95.2%
Other	2.4%
Green Fees	(n=42)
The Springs	23.8%
Radium Resort	16.7%
Eagle Ranch	54.8%
Greywolf	59.5%
Copper Point	31.0%
Windermere	0.0%
Mountainside	16.7%
Riverside	26.2%
Other	7.1%

Almost three-fifths of travellers indicated that their golf tee-time was *Very* (32%) or *Quite Important* (27%) to them. On the other hand, the tee-time was considered *Somewhat less Important* to over a quarter (27%) and in the extreme case *Not At All Important* to over a tenth (14%) of respondents. These results are similar to those for the overall sample. This is reflected in subsequent traveller responses to a question regarding flexibility in starting tee-times. Almost one-half (46%) of these golf travellers were inflexible and could not have golfed at any other time of the day. On the other hand, just over half reported being flexible enough to have golfed earlier (35%) or later (19%) that day. However, over two-thirds (68%) of respondents were not willing to pay more or less to change their golf tee time. There were no practical differences between these travellers and the overall sample (Table 23).

Table 23. Tee-time importance, flexibility in starting tee-times, willingness to pay more/less to change time, days and willingness to pay to golf between alternate days.

	Golf Travellers	Overall
Tee Time	(n=773)	(n=920)
At or before 10:00am	52.0%	51.7%
10:01am to 1:00pm	38.4%	37.9%
1:01pm to 4:00pm	8.5%	9.2%
After 4:00pm	1.0%	1.1%
Tee-time Importance	(n=772)	(n=918)
Very Important	31.5%	29.4%
Quite Important	26.9%	27.6%
Somewhat Important	27.2%	29.6%
Not Important	14.4%	13.4%
Flexibility in Starting Tee Times	(n=729)	(n=847)
I could not have golfed at any other time of the day	45.8%	43.2%
I could have golfed earlier today	35.3%	38.7%
I could have golfed later today	18.9%	18.1%

Interestingly, when looking at tee-time importance and flexibility by the respondents' starting tee-times, there were some notable differences (Table 24). Early evening golfers were likely to report lower levels important for their starting tee-times (12.5% *Very Important* vs. 62.5% *Somewhat Important*, Table 24). However, they were the least flexible of golfer travellers with over half indicating that they could not have golfed at any other time. Similarly, mid-afternoon golfers (tee-times between 1:01pm – 4pm) are likely to place lower importance on tee-times than early or mid-day golfers (40.9% *Somewhat Important* of Mid-afternoon golfers). Those intercepted in the mid-afternoon were also the most flexible in their starting tee-time with less than a third indicating no flexibility (28.6% could not have golfed at any other time).

Looking further into potential differences in tee-time importance and flexibility across golfers revealed little to none additional significant or practical differences (Table 25).

Table 24. Tee-time Importance/Flexibility by Starting Tee-Time (Golf Travellers)

Golf Travellers	At or before 10:00am	10:01am to 1:00pm	1:01pm to 4:00pm	After 4:00pm	Overall
Tee Time Importance	(n=400)	(n=295)	(n=66)	(n=8)	(n=769)
Very important	35.5%	27.5%	27.3%	12.5%	31.5%
Quite important	30.3%	25.8%	13.6%	25.0%	27.0%
Somewhat important	22.8%	29.2%	40.9%	62.5%	27.2%
Not important	11.5%	17.6%	18.2%	0.0%	14.3%
Tee Time Flexibility	(n=377)	(n=279)	(n=63)	(n=7)	(n=726)
I could not have golfed at any other time of the day	49.9%	43.7%	28.6%	57.1%	45.7%
I could have golfed earlier today	28.9%	41.2%	47.6%	42.9%	35.4%
I could have golfed later today	21.2%	15.1%	23.8%	0.0%	18.9%

Table 25. Tee-time Importance/Flexibility by Day of the Week (Golf Travellers)

Golf Travellers (n=789)	Day of the Week (intercepted)		Overall
	Monday to Wednesday	Thursday to Sunday	
Tee-time by day of week	(n=370)	(n=413)	(n=783)
Before and including 10am	54.3%	49.4%	51.7%
10:01am to 1:00pm	36.5%	40.2%	38.4%
1:01pm to 4:00pm	8.4%	9.2%	8.8%
After 4pm	0.8%	1.2%	1.0%
Tee-time Importance by day of week	(n=372)	(n=410)	(n=769)
Very Important	33.1%	30.0%	31.5%
Quite Important	25.8%	28.3%	27.0%
Somewhat Important	27.7%	26.3%	27.2%
Not Important	13.4%	15.4%	14.3%
Tee-time Flexibility by day of week	(n=351)	(n=388)	(n=726)
I could not have golfed at any other time of the day	46.2%	44.6%	45.7%
I could have golfed later today	16.8%	20.6%	18.9%
I could have golfed earlier today	37.0%	34.8%	35.4%

In an effort to look at trying to shift golf demand from busy, high in demand times of the day and days of the week to less busy, lower demand days, respondents who indicate having some tee-time flexibility were asked if they were either willing to pay a premium or a receive a discount to golf at a different time. Specifically, golfers who expressed the ability to have golfed earlier in the day were asked if they would be willing to pay x% more to have golfed earlier. Alternatively, golfers who had the ability to have golfed later in the day were asked if they would have golfed later if they had received an x% discount (Figure 8).

Ability to shift tee-time demand was also assessed at the day of the week level. All respondents were asked about their willingness to pay a premium or a discount to golf on certain periods of the week (divided into peak demand days - Thursday through Sunday and low demand days - Monday through Wednesday).

Just over a third of all golf travellers (35.4%, Table 25) were able to have golfed earlier in the day, less than a tenth of those were willing to pay a premium (regardless of amount) for an earlier tee-time (7.0%, Figure 8). Not surprisingly, the 10% premium was the best received premium amount; however, only 10% of those who were asked would have been willing to pay 10% more to have golfed earlier in the day.

Conversely, of the approximately nearly one fifth of golf travellers (18.9%, Table 25) who were able to have golfed later in the day, approximately three quarters were willing to switch to a later tee-time in return for a discount (Figure 9). Interestingly, comparing the willingness to pay against the three discount price points that were tested, 20% less fared the best, with almost 90% of those asked indicating that 20% discount would influence them to have golfed later in the day. With less than three quarters willing to accept a 10% discount to have golfed early may indicate that a 10% discount (as compared to a 20%) was not a significant enough of a benefit to have shifted their demand.

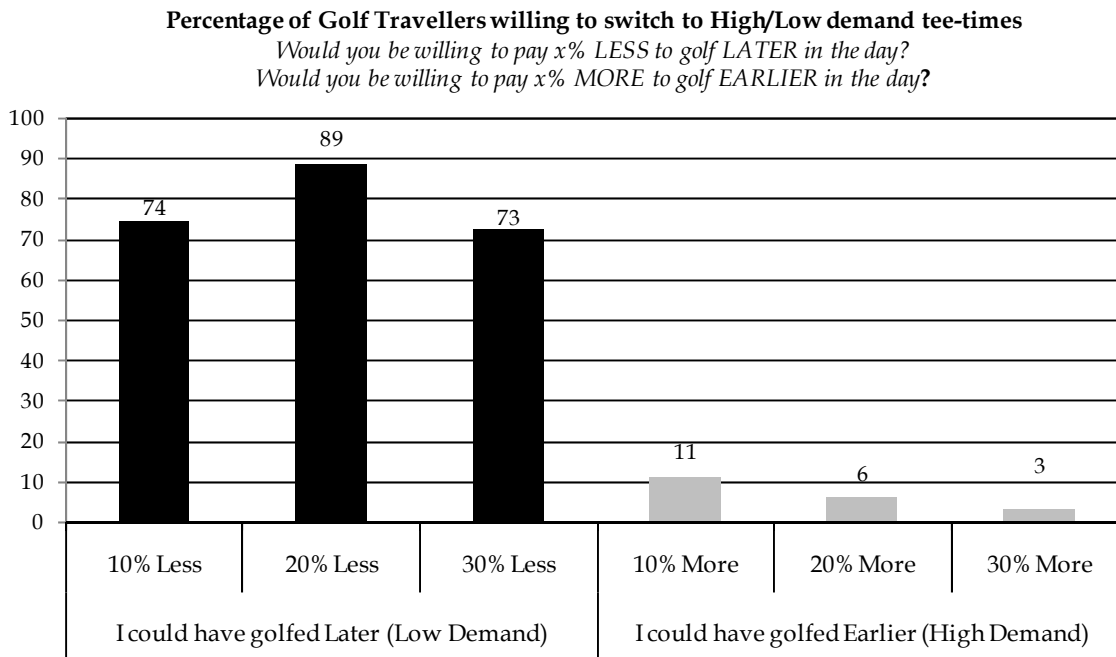


Figure 8. The percentage of golf travellers will to pay a premium to golf in high demand tee-times or to receive a discount golf in lower demand tee-times. Only golfers who indicated tee-time flexibility were asked about willingness to pay. Percentage value of premium/discount randomly assigned. (i.e. One-third of qualified respondents received 10%; 20% or 30% discount/premium).

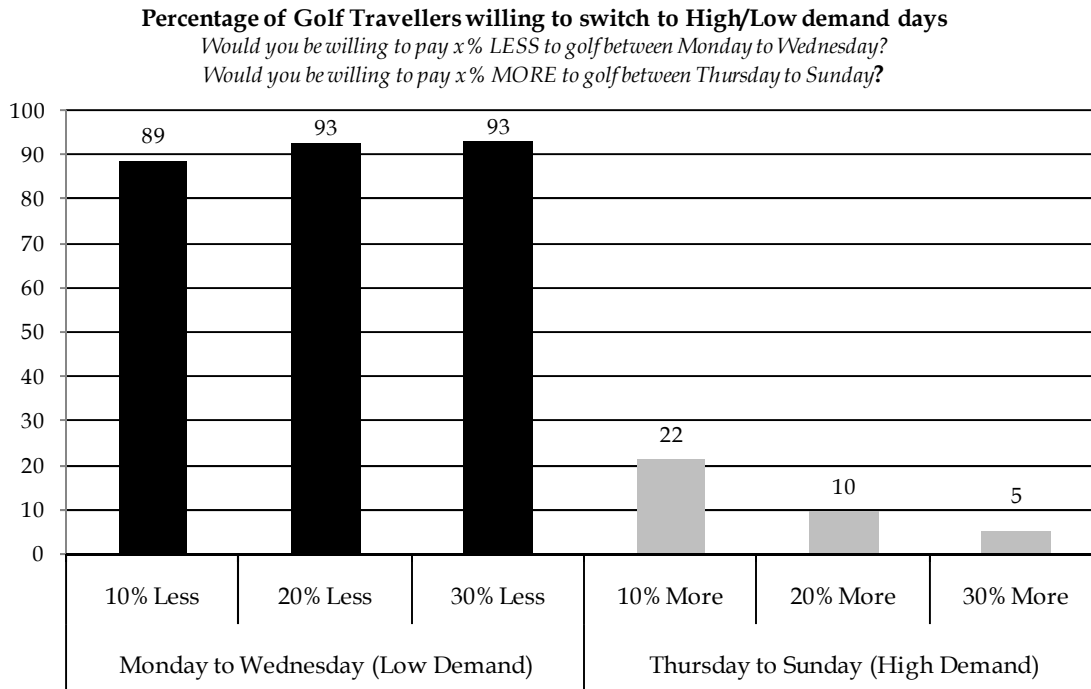


Figure 9. The percentage of golf travellers willing to pay a premium to golf on high demand days of the week or receive a discount golf on lower demand days of the week. Percentage value of premium/discount randomly assigned (i.e. One-third of qualified respondents received 10%; 20% or 30% discount/premium).

In an effort to better understand the components of a Columbia Valley golf trip that require most improvements and areas of greatest importance, respondents were asked to rank the satisfaction and importance for various trip factors on a scale of 1 to 5 (with 1 being *Very Satisfied/Important* and 5 being *Not at all Satisfied/Important*). The results of importance vs. satisfaction ratings are summarized in scatter graph format. Respondents who stated “no opinion” or did not provide a response were removed from the average calculations.

The factor listed as most important while planning, purchasing and while on their golf trip was understanding the *Number of Golf Courses offered in the Columbia Valley* (mean=3.76, Figure 10). Importantly, this element also received the highest rating in terms of travellers’ satisfaction (mean 4.16), indicating that golf travellers feel that it is important to have a destination that offers a variety of courses to play at and the Columbia Valley is excelling in this area. Most of the factors were found to be Somewhat Important such as, *Finding Detailed Information about BC golf trips on websites*; *Number of Activities Available (other than golf)* and *Finding detailed golf information in Brochure from resort/course*, however, the aspect that received the lowest importance rating was *Ease of Accessibility from a Major Airport* (mean=1.64). This accessibility factor also received the lowest satisfaction rating (mean = 2.99).

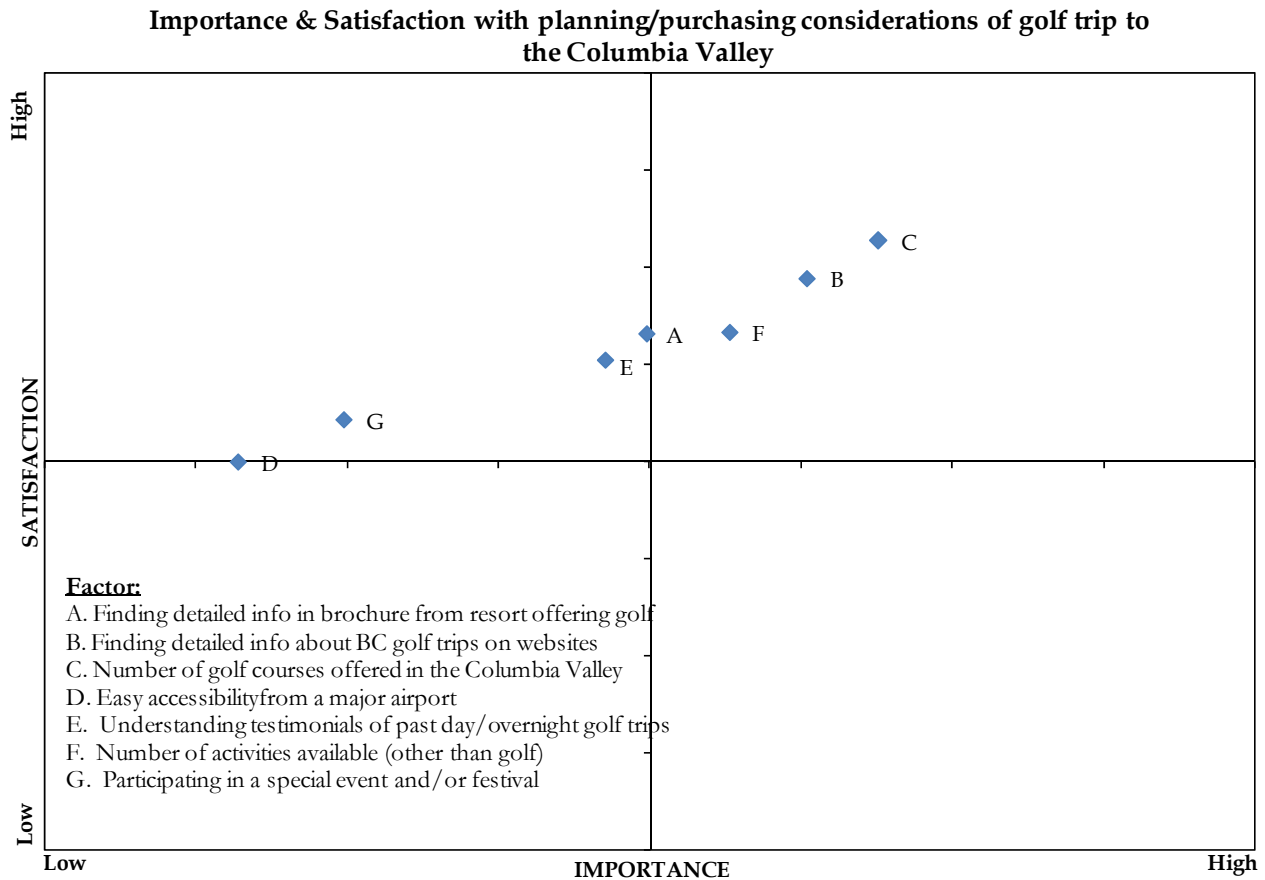


Figure 10. Respondents’ Importance and Satisfaction Ratings with Planning/Purchasing Components of Columbia Valley Golf trip.

In an effort to better understand the components of a Columbia Valley golf trip that require most improvements and areas of greatest importance, as well as identify areas where the destination is currently meeting and exceeding consumer expectations, respondents were asked to rank the satisfaction and importance for various service areas and trip factors on a scale of 1 to 5 (with 1 being *Very Satisfied/Important* and 5 being *Not at all Satisfied/Important*). The results of importance vs. satisfaction ratings are summarized in scatter graph format. Respondents who stated “no opinion” or did not provide a response were removed from the average calculations.

The service areas and golf trip components that were listed as most important by respondents were *Quality of Courses* (mean= 4.61) and *Condition of Course* (mean=4.63, Figure 11). Importantly, these elements also received high satisfaction scores from the majority of respondents, indicating that while quality of course and course conditions are important factors to overall customer satisfaction (means =4.50 & 4.33, respectively), on average, the Columbia Valley courses are meeting these needs. Other factors listed as high importance to golf travellers were *Cost of Green Fees* (mean=4.47) and *Customer Service at Golf Shop/Clubhouse* (mean=4.37). It is noteworthy that while the customer service at the courses received high satisfaction rates (mean = 4.43, similar to *Quality/Condition of Courses* ratings), the *Cost of Green Fees* received the third lowest satisfaction score (mean = 3.61).

Most of the factors such as, *Golf Shop/Clubhouse; Golf Carts; On-site Food & Beverage* and *Reputation of Course* were found to be Somewhat Important and Somewhat Satisfied (Quadrant II - in the High Importance/Satisfaction range) which would indicate an overall impression that currently the Columbia Valley area golf courses are currently at least meeting golf travellers' expectations. The two aspects that received lowest satisfaction ratings also received the lowest importance ratings and were services that majority of golf travellers may not have used (*Adult Golf Lessons & Equipment rental/repair services*).

Importance & Satisfaction with services provided at Columbia Valley Golf Courses

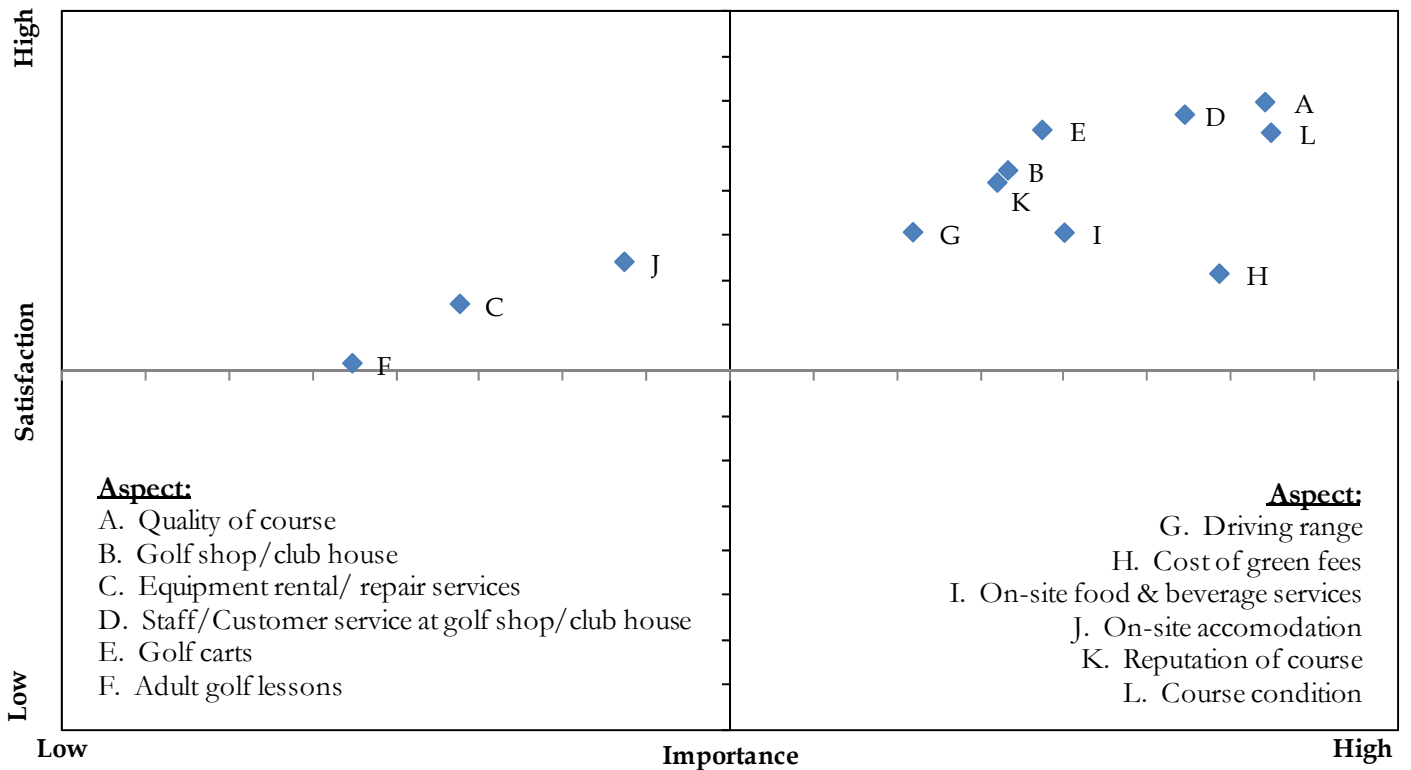


Figure 11. Respondents' Importance and Satisfaction Ratings with Services Provided at Columbia Valley Golf Courses.

Respondents to the follow-up questionnaire were asked about their satisfaction with their trip in the Columbia Valley (Figure 12). Four-fifths of respondents (81%) were *Very Satisfied* with their trip. The few who were dissatisfied (7%), they cited bad weather, limited inexpensive things to do, high costs and poor quality golf course compared to other resorts in the area as reasons for their poor rating.

Respondents to the follow-up questionnaire were also asked about their likelihood of recommending the Columbia Valley as a place to visit for family and friends (Figure 13). A majority of respondents indicated that they were either *'Very Likely'* (81%) or *'Likely'* (16%) to do so.

Satisfaction With Trip in the Columbia Valley

Overall, how satisfied or dissatisfied were you with your trip in the Columbia Valley?

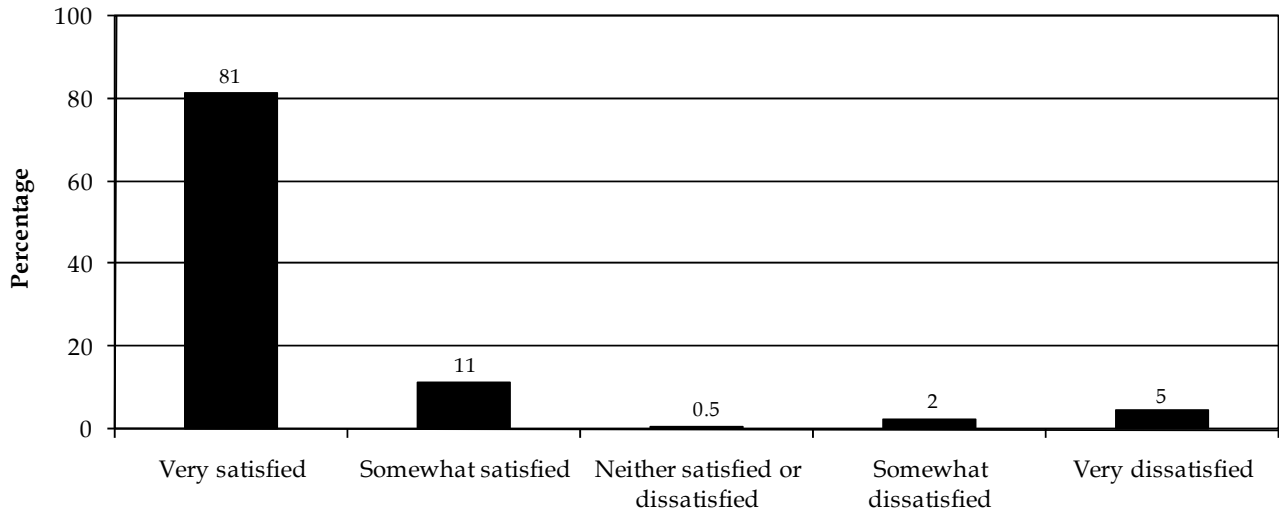


Figure 12. British Columbia trip satisfaction for golf travellers (n=221).

Likelihood of Recommending the Columbia Valley

How likely would you be to recommend the Columbia Valley as a place to visit for family and friends?

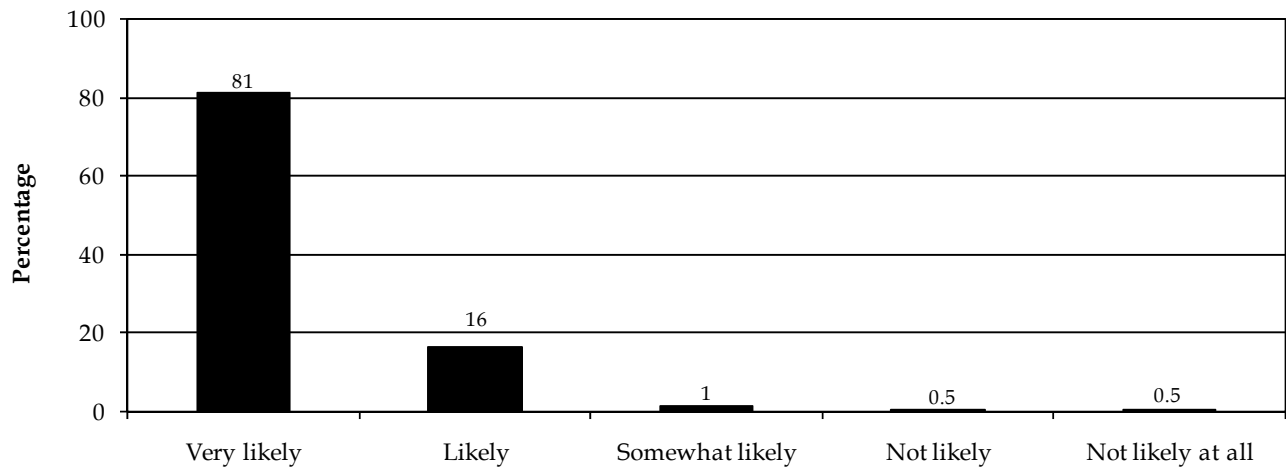


Figure 13. Likelihood of recommending the Columbia Valley as a place to visit for family/friends (n=221).

Follow-up survey respondents were asked about their likelihood of returning to the Columbia Valley Columbia for another leisure trip. A large majority (94%) of travellers indicated that they were either 'Very Likely' (80%) or 'Likely' (14%) to return to the Columbia Valley for a future trip (Figure 14).

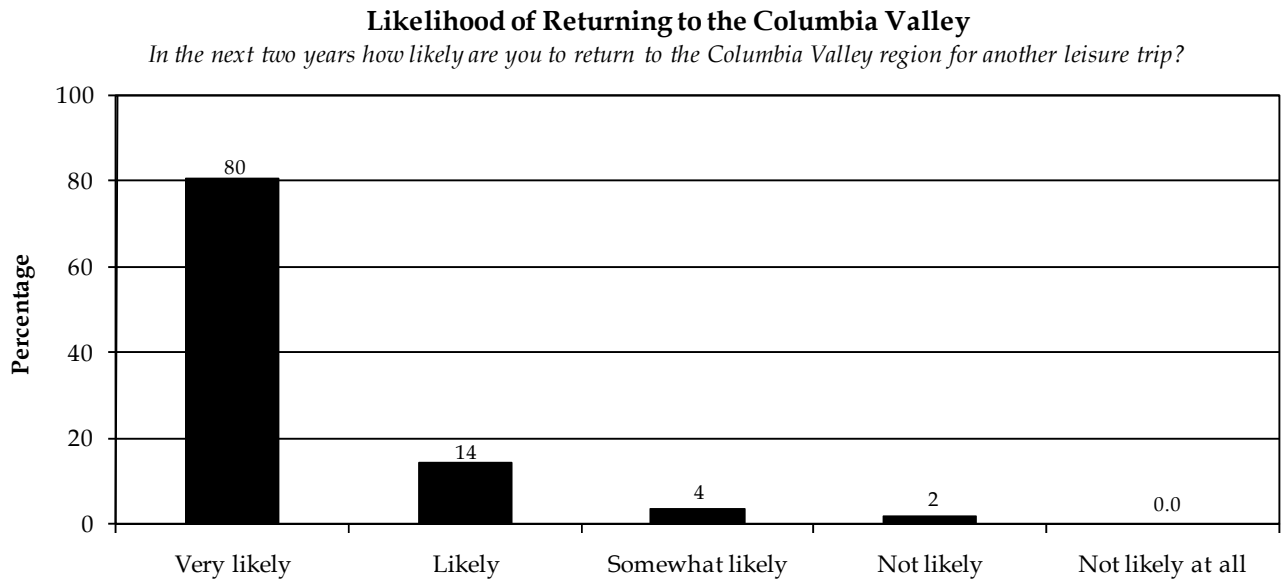


Figure 14. The likelihood of travellers taking another leisure trip to the Columbia Valley (n=220).

Respondents to the follow-up questionnaire were asked about their satisfaction with the overall value at the golf resort at which they were interviewed (Figure 15). Almost three-fifths of respondents (57%) were *Very Satisfied* with their overall golf course experience. Another one-third (32%) were *Somewhat Satisfied* with the overall value of what they received. Although a minority, almost one-tenth (8%) of respondents indicated that they were *Somewhat* or *Very Dissatisfied*. Reasons provided by these respondents were primarily related to cost, but also mentioned were poor course conditions and limited dining opportunities at the end of the day (see Appendix D for detailed responses).

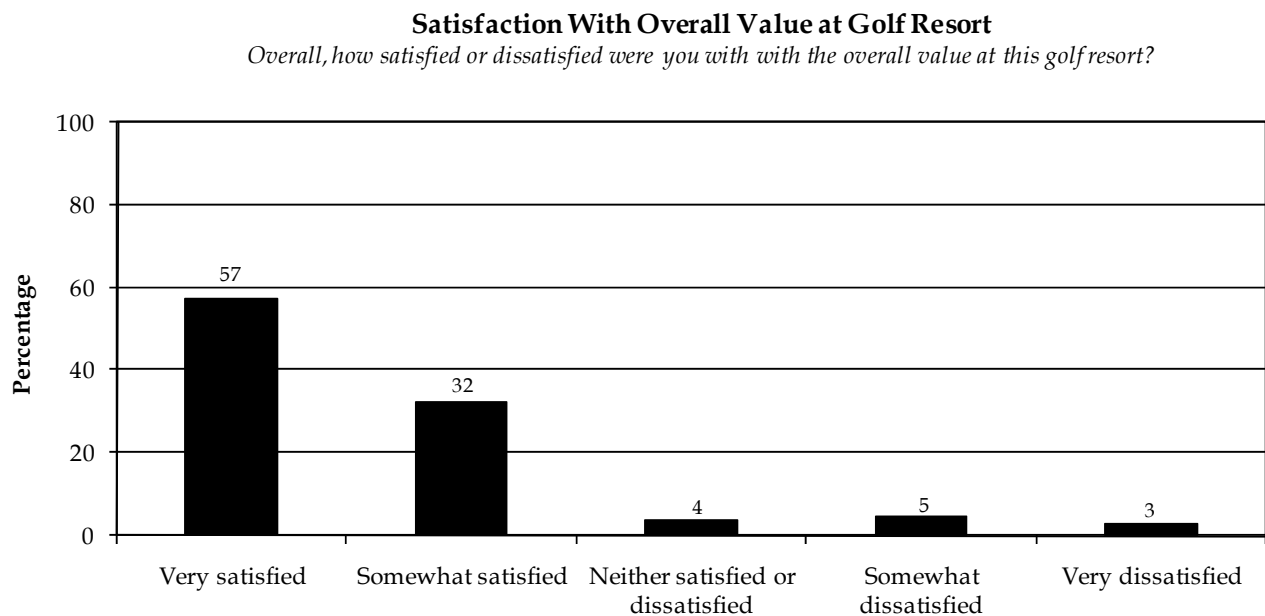


Figure 15. Satisfaction with overall value at golf resort (n=221).

Respondents to the follow-up survey were asked for additional comments/suggestions about their trip in the Columbia Valley or suggestions on what the province of British Columbia could do to enhance their golfing experience. Thirty five percent of travellers (n=78) shared their thoughts. One-third (33%) of these responses were primarily positive comments affirming that things were fine as they were. A smaller proportion of responses (15%) raised the issue of cost/value while 12% would have liked to have seen improvements in information dissemination/booking options. Less than a tenth (8%) raised issues pertaining to their golf experience, provided suggestions about multi-course packaging (6%) or expressed a desire for improvements in golf product packaging (6%). Other suggestions touched on the need for better transportation options (5%), programs for children (3%), golf course development (3%) and the need to keep it quaint and leave things they were (3%, Table 26). A detailed listing of these responses is provided in Appendix E.

Table 26. Participation in activities by respondent and/or travel party while on other leisure trips in past year.

	Percentage
Additional Comments/Suggestions to Enhance Golfing Experience	(n=78)
Positive Comments - nothing to improve upon	33.3%
Cost/Value	15.4%
Better Information Dissemination/Booking Options	11.5%
Golf Experience	7.7%
Multi-Course Packages	6.4%
Improved Packaging	6.4%
Other	6.4%
Better Transportation Options	5.1%
Keep it Quaint	2.6%
More Development	2.6%
Programs for Children	2.6%

Perceptions of Columbia Valley and British Columbia

In the follow-up questionnaire, travellers were asked “What positive and/or negative images come to mind when you think of the Columbia Valley as a vacation destination?” These image questions were asked to obtain an understanding of what travellers perceive the Columbia Valley to be doing right and what regional stakeholders can work on in terms of attracting and keeping travellers in the region.

A total of 216 follow-up survey respondents, representing 98% of the sample, included their comments on perceived positive aspects of Columbia Valley as a vacation destination. This group provided a total of 610 responses to the question. Positive responses were dominated by the golf experience (63%), the natural beauty and scenic landscapes (56%) and to a lesser extent, weather (34%, Figure 16). Comments provided by respondents are included in Appendix F.

A total of 156 follow-up survey respondents, representing 71% of the sample, included their comments on perceived negative aspects of Columbia Valley as a vacation destination. This group provided a total of 311 responses to the question. Negative perceptions from respondents at Columbia Valley golf courses focused unequivocally and overwhelmingly on cost (65%) and to a much lesser extent by crowding/busy (17%) and distance (14%, Figure 17). A detailed listing of these comments is included in Appendix G.

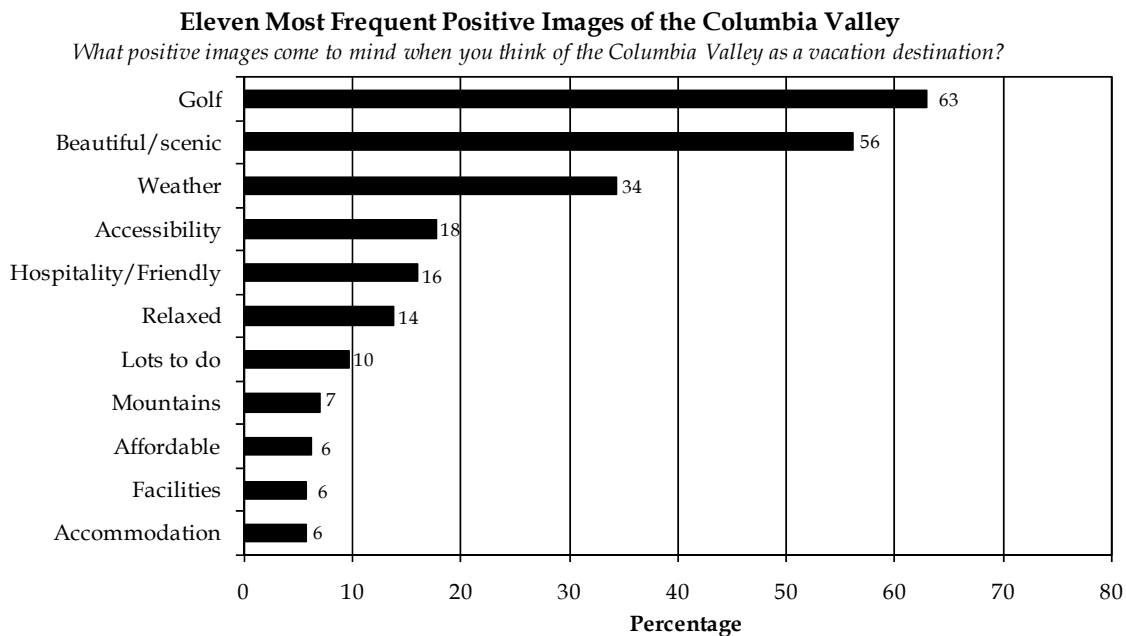


Figure 16. The most frequent positive images respondents had of the Columbia Valley as a golf destination. 216 respondents replied with 610 images.

Eleven Most Frequent Negative Images of the Columbia Valley

What negative images come to mind when you think of the Columbia Valley as a vacation destination?

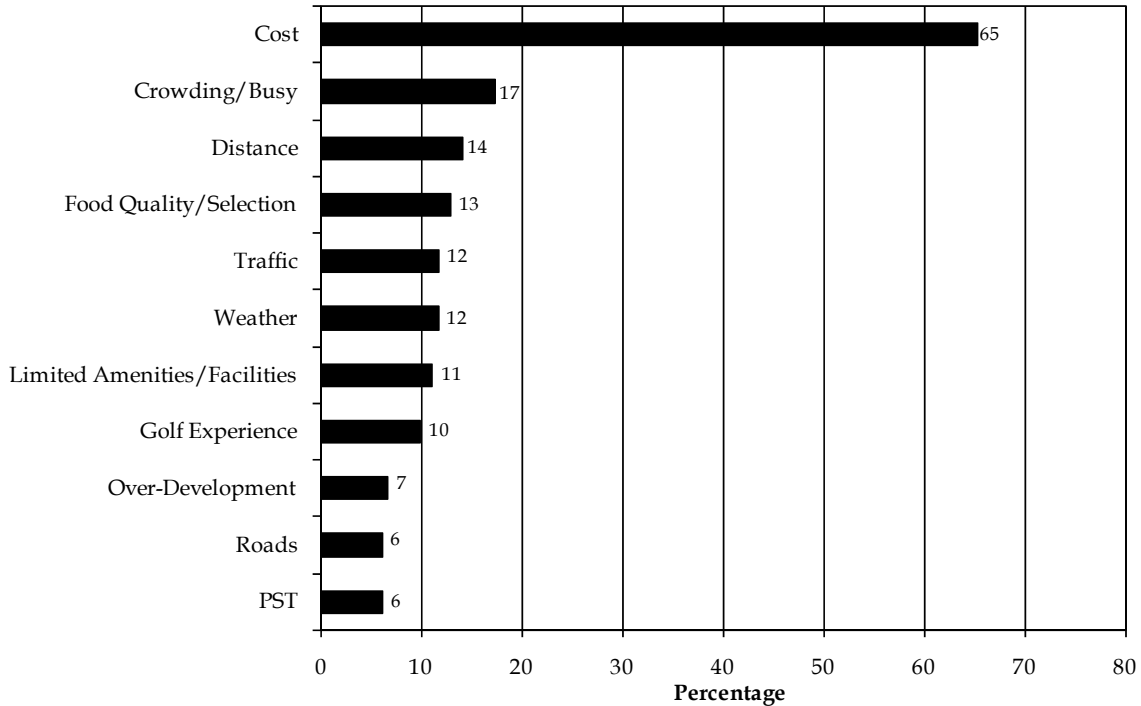


Figure 17. The most frequent negative images respondents had of the Columbia Valley as a vacation destination. 156 respondents replied with 311 images.

Respondents were asked about up to three destinations inside of British Columbia that they felt were similar to the Columbia Valley. The top 10 similar destinations (Table 27) were a mix of destinations also in the Kootenay Rockies as well other tourism regions in BC. Over a fifth of responses indicated that the Columbia Valley was similar to a destination outside of the Kootenay Rockies (e.g. Kelowna/Vancouver Island and/or the Okanagan) while other Kootenay Rockies destinations (Golden, Fernie and/or Cranbrook) rounded out the top ten destination list.

Table 27. Top 10 British Columbian Destinations Similar to the Columbia Valley

Destination mentioned	% of the responses
Kelowna	27.4
Vancouver Island	24.0
Okanagan	22.9
Kimberley	14.5
Victoria	14.5
Golden	10.1
Fernie	7.3
Cranbrook	6.7
Kamloops	6.7
Vancouver	6.7

* n=179; multiple category response and responses were unprompted and recorded as verbatim.

Community Comparison

Based on their responses to the previous similar destination question, respondents were asked whether the Columbia Valley had better, worse or similar performance in specific service areas as compared to a similar destination that they had mentioned. In this analysis, the net difference in the percentage of respondents describing the Columbia Valley as better and those describing similar destinations as better is used as an indicator to assess the overall performance of the Columbia Valley in relation to similar destinations. Respondents were asked to list both similar destinations inside and outside of British Columbia and the corresponding results are presented in Figure 18.

Golf travellers felt that the Columbia Valley had better performance in nine out of seventeen (52.9%) service areas as compared with similar destinations inside of British Columbia. In general, the Columbia Valley was thought to be better than other BC destinations at having good opportunities to visit provincial/national parks (net difference of +21.6%, Figure 18), as being Safe and Clean and being a Good place for golfing (net difference +16.2% and 14.5% respectively). The Columbia Valley has thought to be only slightly better for being a good place for Aboriginal cultural activities (net difference of 0.6%). The area was deemed similar to other destinations in terms of being a good place for outdoor recreational activities (net difference of 1.1%). On the other hand, the valley was perceived to lack excellent shopping (net difference of -34.6%), excellent restaurants (net difference of -32.4%) and as providing a fun nightlife and evening entertainment (net difference of -33.5%). As well, the valley was rated lower for offering opportunities for arts and culture (net difference of -24.0%).

Comparison between Columbia Valley and Other Destinations inside BC
"Columbia Valley Better" Minus "Other Destinations in BC Better"

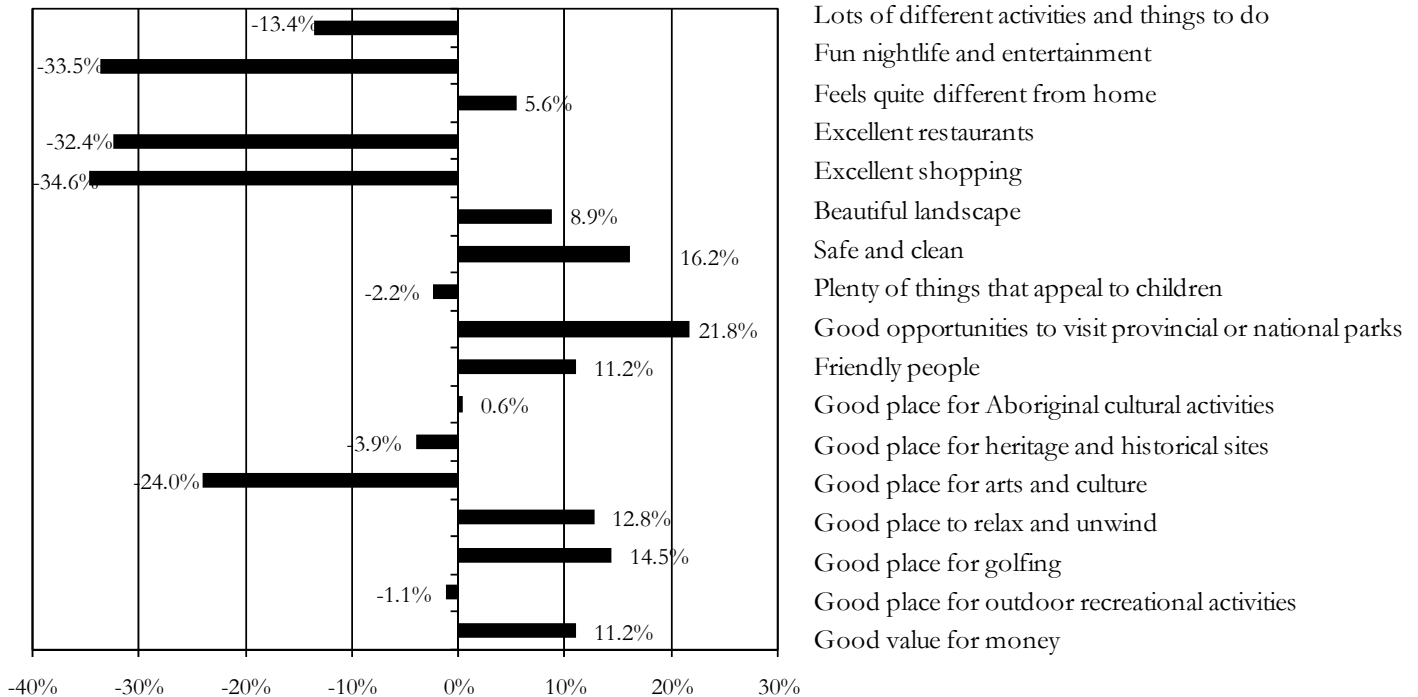


Figure 18. Destination comparison between Columbia Valley and Other Destinations inside of BC in terms of destination competitiveness. Positive percentages show Columbia Valley rated better compared to comparison destination.

Travel Experience in BC

Respondents to the follow-up questionnaire were asked about their likelihood of taking another leisure trip in British Columbia. Similar to the likelihood of returning to Columbia Valley, BC also had a high propensity of return for future leisure trips. The majority of respondents indicated that they were 'Very Likely' (90%) or 'Likely' to do so (6%, Figure 19) in the next two years.

Respondents to the follow-up questionnaire were also asked about their likelihood of taking another leisure trip in British Columbia with the main motivation of the trip being to golf. Almost three-quarters (74%) of respondents indicated that they were 'Very Likely' to do so whereas another sixth felt they were 'Likely' to be motivated to visit British Columbia because of golf (16%, Figure 20).

Likelihood of Taking Another Trip in British Columbia

In the next two years, how likely is it that you will take another trip in British Columbia?

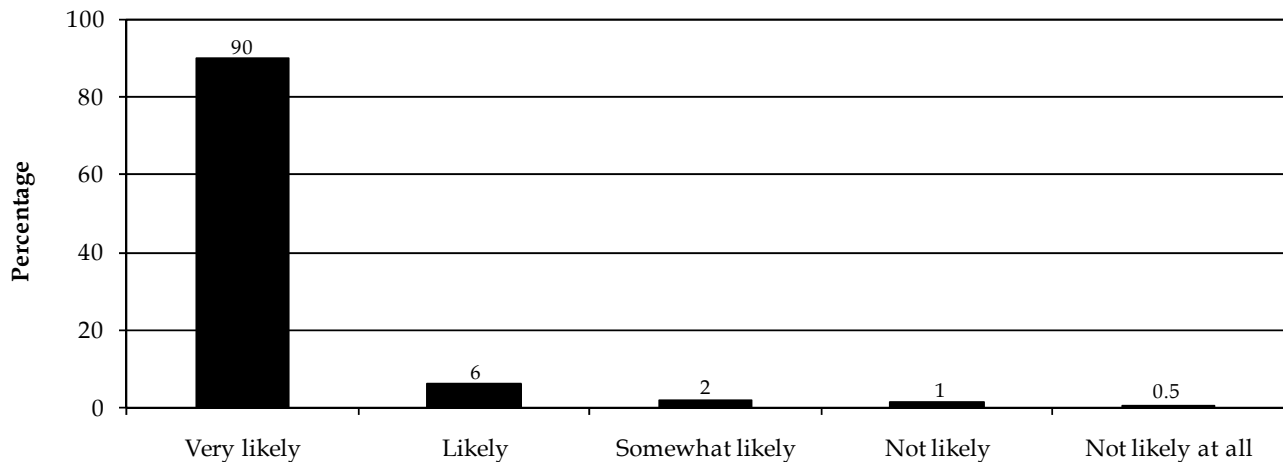


Figure 19. The likelihood of travellers taking another leisure trip within British Columbia (n=221).

Likelihood of Taking Another Trip in British Columbia

In the next two years, how likely is it that you will take another trip in British Columbia with the main motivation of the trip being to golf?

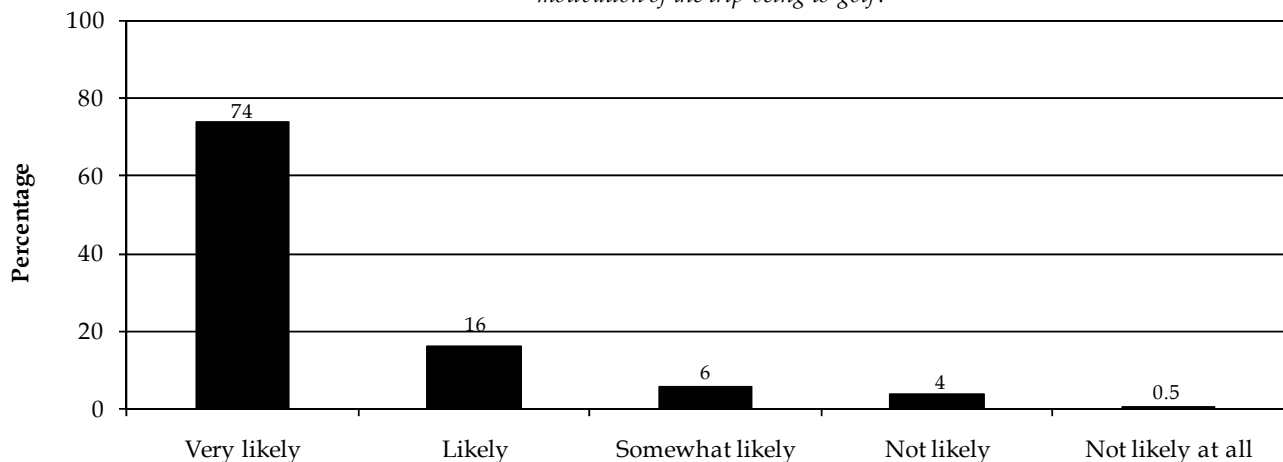


Figure 20. The likelihood of travellers taking another leisure trip within British Columbia with the main motivation of the trip being to golf (n=221).

Follow-up survey respondents were asked to identify up to three unique characteristics of the British Columbia as a golf destination. These characteristics could be useful for promotional activities to attract golf travellers to the area. A total of 209 follow-up survey respondents, representing 95% of the sample, included their comments on perceived unique aspects of British Columbia as a golf destination. This group provided a total of 539 responses to the question. A variety of characteristics were identified as unique to the area. The most common were its scenery (69%) and the variety of golf course offerings (69%). Less frequently mentioned characteristics included weather (33%), proximity/accessibility (17%) and mountain golf (14%, Figure 21). Appendix H provides a listing of the characteristics provided by respondents to this question.

Ten Most Unique Characteristics of British Columbia as a Golf Destination

What are the unique characteristics of British Columbia as a golf destination?

Unique characteristics are those that make British Columbia different from other destinations

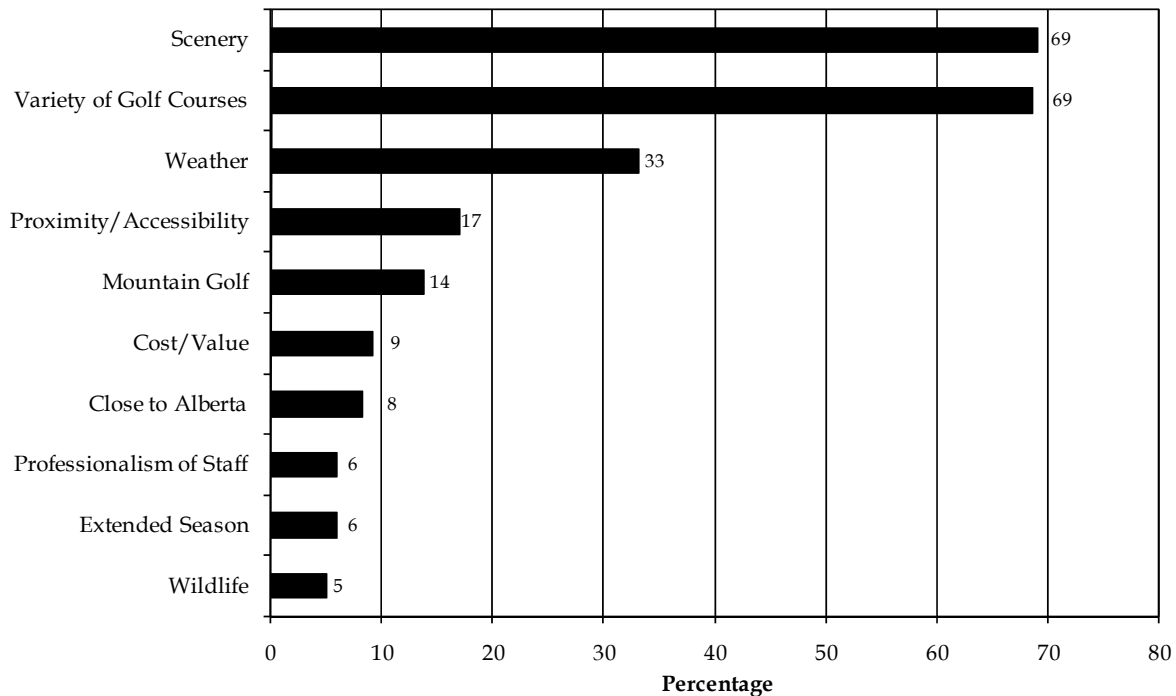


Figure 21. The most frequent unique characteristics of British Columbia as a golf destination. 209 respondents replied with 539 characteristics.

Expenditures

Travellers were asked, "In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodations?" Golf travellers interviewed at the Columbia Valley spent an average of \$423.23 per day or \$106.51 per person per day. Spending patterns varied noticeably depending on the origin of the travellers, ranging from \$416.22 for travellers from Alberta to \$480.88 for those visiting from the US. From a per person per day perspective, BC residents spent the most (\$140.42) whereas those from Alberta spent the least (\$100.49, Table 28).

There were also practical differences in daily expenditures when broken down by primary accommodation type, which ranged from \$240.76 for those staying in a campground/RV to \$688.89 for those staying at a B&B. This was also true on the individual traveller level (per person daily expenditures) where campground/RV users spent the least (\$73.18) and those at B&B's spent the most (\$202.56, Table 28).

Given that respondents were asked to provide daily expenditures based upon the spending of their entire travel party, it is not surprising that larger parties spent more than smaller parties per day. This ranged from \$143.75 for those travelling alone to \$760.97 for travel parties containing seven or more people. These results are reversed from a per person expenditure perspective as those in the larger groups spent less (\$80.80 for a group of seven or more) than did those in smaller groups (\$143.75 for a solo traveller, Table 28).

There were also noteworthy differences in daily expenditures based upon respondents' age category. Results ranged from per day expenditures of \$351.33 for travellers over the age of 65 to \$479.40 for travellers between 25-34 years of age. When looked at from a per person per day perspective, those aged 55 to 64 spent the most (\$122.92) whereas those aged 35 to 44 spent the least (\$96.86, Table 28).

In the follow-up survey, visitors were asked to provide more detailed information about their travel party's spending during their golf trip in the Columbia Valley. The average spending based on the follow-up survey (\$414.19) was slightly lower when compared to average spending reported by respondents in their initial interview (\$423.23). Visitors who completed the follow-up survey were asked to provide information on the proportion of their spending that would be attributed to eight different categories. Of the total dollars that visitors reported spending, the highest proportion, over a third (36%) was spent on outdoor recreation, followed by accommodation (22%), food and beverage (21%), transportation (13%) and shopping (5%). Less was reportedly spent on other entertainment (2%), attractions (1%) or in other areas (1%) not adequately captured by the survey categories.

The highest average spending was on outdoor recreation including golfing, park pass, and nature guides (average expenditure in this category was \$147.45 for those who reported spending). The lowest level of spending was on attractions such as admission, shows and tours, reported by 1% of all visitors with an average purchase of \$5.38 (for those who reported spending). The proportions and the corresponding dollar amounts spent on the various categories are summarized in Table 29.

Table 28. The average daily expenditures of travellers at Columbia Valley Golf Courses.

\$ CDN Daily Expenditures*	Average Per Party Daily Expenditure (n=655) ¹	Average Per Person Daily Expenditure (n=655) ¹
Overall Average	\$423.23	\$106.51
<i>Median</i>	<i>\$300.00</i>	<i>\$87.50</i>
Origin		
BC	\$476.51	\$140.42
Alberta	\$416.22	\$100.49
Other Canada	\$429.64	\$135.12
US	\$480.88	\$106.79
Other International	\$430.91	\$119.95
Primary Accommodations		
Hotel/Motel	\$526.58	\$155.86
Campground/RV	\$240.76	\$73.18
Friends OR Relatives	\$339.01	\$88.00
Other ²	\$500.00	\$125.00
B&B	\$688.89	\$202.56
Resort	\$624.58	\$148.09
Timeshare	\$371.17	\$90.22
Second Home	\$372.29	\$87.83
Rental House/Condo	\$570.00	\$125.10
Travel Party Size		
1 person	\$143.75	\$143.75
2 people	\$278.89	\$139.45
3-6 people	\$396.01	\$94.46
7 or more people	\$760.97	\$80.80
Age		
Under 24 Years	\$408.33	\$101.75
25-34 Years	\$479.40	\$114.00
35-44 Years	\$456.88	\$96.86
45-54 Years	\$393.35	\$98.06
55-64 Years	\$428.71	\$122.92
65 Years or Older	\$351.33	\$112.77

*The top and bottom 2% of responses were trimmed to ensure an accurate mean daily expenditure.

Practical differences of $\pm 10\%$ from the overall average are colour-coded.

1. Business travellers and day trippers were not included in this analysis.

2. n=1

Table 29. Travel Party Spending by Visitors Interviewed at Columbia Valley Golf Courses.

	Percent of Total	Average Spending per Travel Party ¹ (n=205)
Accommodation (hotels, motels, lodge, camping/RV fees, etc.)	21.9%	\$90.71
Transportation (flights within BC, vehicle rental, gas, repairs, ferry, taxi, etc.)	12.6%	\$52.19
Food & beverage (include any taxes and tips paid)	20.8%	\$86.15
Shopping (clothing, gifts, film, books, etc.)	5.1%	\$21.12
Attractions (admission, shows, tours, etc.)	1.3%	\$5.38
Outdoor recreation (golfing, park pass, nature guide, etc.)	35.6%	\$147.45
Other entertainment (spa, etc.)	2.1%	\$8.70
Other (unspecified)	0.6%	\$2.49
Total	100.0%	\$414.19

1. Excludes business travellers, residents and those who were travelling as part of an organized golf tour.

Travel parties spent an average of \$414.19 during their trip. Parties that included children reported spending substantially less (\$282.32), about three fifths as much as those travelling without children (\$461.03). Those who were members of a semi-private/public club (\$440.78) spent more than did those who were not members of a golf club (\$389.26) whilst those who were members of private club (\$536.16) spent the most. Those who spent 9-12 weeks planning their trip spent the most during their trip (\$556.70) whereas those who planned their trip 1-6 days prior to departure spent the least (\$289.15). There was a linear relationship between the length of time spent planning the golf component of the trip and the amount of money spent during the trip. In other words, those who planned their golf component on the day of departure spent the least (\$171.43) whereas those who spent 13+ weeks pre-planning this component spent the most (\$616.01, Table 30). This is likely a function of the length of trip since those on longer trips tend to spend more time planning their vacation. However, the potential relationship of length of trip, length of time spent planning and average daily expenditures warrants the need to ensure that appropriate travel planning information including golf resources, is available throughout the year for use by those who do spend considerable time planning their trips.

From a per person perspective, the average expenditure was \$114.35. The pattern of spending for parties with/without children and for golf club membership was consistent with what was found earlier (i.e., those travelling with children spent less and non-members spent less than did members of semi-private/public clubs who in turn spent less than did members of a private club). With respect to advance trip planning, those who booked their trips 1-6 days (\$134.57) and 3-8 weeks in advance (\$134.99) spent the most whereas those who booked their trip 1-2 weeks in advance spent the least (\$101.57). Those who booked the golf component of their trip 1-6 days in advance spent the least (\$88.79) whereas those who booked this component 13+ weeks in advance spent the most (\$148.53, Table 30).

Table 30. Average Spending by Golf Club Membership, Travel Parties with Children, Advance Trip and Golf Component Planning.

	Average Spending per Travel Party ¹	Average Spending per Person ¹
Overall	\$414.19	\$114.35
<i>Median</i>	<i>\$250.00</i>	<i>\$90.45</i>
Children in Travel Party		
Yes	\$282.32	\$61.76
No	\$461.03	\$128.51
Golf Club Member		
Yes - Private Club	\$536.16	\$149.54
Yes - Semi-Private/Public Club	\$440.78	\$119.52
Not a Member	\$389.26	\$107.41
Advance Trip Planning		
1-6 days	\$289.15	\$134.57
1-2 weeks	\$304.55	\$101.57
3-8 weeks	\$413.22	\$134.99
9-12 weeks	\$556.70	\$125.51
13+ weeks	\$423.79	\$102.95
Advance Golf Component Planning		
Day of departure	\$171.43	\$94.71
1-6 days	\$251.16	\$88.79
1-2 weeks	\$322.00	\$92.25
3-8 weeks	\$456.57	\$130.79
9-12 weeks	\$557.39	\$117.98
13+ weeks	\$616.01	\$148.53

1. Excludes business travellers, residents and those who were travelling as part of an organized golf tour.

Resident Golfer Characteristics

Amongst those interviewed in this study were residents of the Columbia Valley, defined as the region including the area south of Spillimacheen and north of Canal Flats. These respondents were excluded from the survey after a series of short questions.

Over two-thirds of resident golfers were between 35 and 54 years of age. Of these, almost two-fifths (37%) were 35 to 44 years old and a third (34%) were between the ages of 45 and 54. Almost a quarter (24%) were over the age of 55, 4% were between 25 to 34 years whereas only 2% of respondents were under 24 years of age. Over four-fifths of these residents had completed college or university. These included over two-fifths (45%) who had completed a college or technical diploma and almost a third that had completed a university degree (32%). Practical differences were between resident golfers and the overall sample with respect to age (35-44 years old: 36% (resident), 22% overall) and education ((college/technical diploma: 45% (resident), 26% overall), university degree: 32% (resident), 43% (overall), Table 31).

Table 31. Traveller demographics at Columbia Valley golf courses.

	Residents	Overall
Origin	(n=120)	(n=940)
British Columbia	100.0%	19.3%
Alberta	0.0%	69.7%
Other Canada	0.0%	7.0%
US	0.0%	2.4%
Other International	0.0%	1.6%
Age	(n=118)	(n=916)
Under 24 Years	1.7%	2.4%
25-34 Years	4.2%	8.2%
35-44 Years	36.4%	21.9%
45-54 Years	33.9%	36.5%
55-64 Years	20.3%	24.5%
65 Years or Older	3.4%	6.6%
Education	(n=117)	(n=913)
Less Than High School	0.0%	0.2%
High School	2.6%	11.1%
Some Technical, College or University	13.7%	8.7%
College or Technical Diploma	45.3%	25.8%
University Degree	31.6%	43.3%
Masters or a PhD Degree	6.8%	11.0%

1. Business travellers have been excluded.

The highest proportion of overnight golfing trips taken by residents was two trips (27%). The next most common response was zero trips. Almost twice (25%) as many residents reported taking no overnight golfing trips in the previous year compared to the overall sample (14%), a difference that is considered practical and noteworthy. On average, resident golfers had taken 1.9 trips over the previous 12 months to purposely play golf. This too was lower than the average of 3.3 trips taken by the overall sample (Table 32).

Over two-thirds of resident golfers reported playing between 11-39 rounds of golf in the previous year. This included almost two-fifths (37%) who played 11-20 rounds of and almost a third (32%) who played 21-39 rounds. Differences were found to exist between resident golfers and the overall sample with respect to rounds of golf played in the previous year: 11-20 rounds (37% residents, 26% overall) and 40-59 rounds (5% residents, 16% overall, Table 33). This highlights the potential that exists for growing the resident golfer market.

Table 32. Total overnight golfing trips and total rounds of golf played last year.

	Residents	Overall
Total Overnight Golfing Trips	(n=118)	(n=902)
0	24.6%	13.5%
1	18.6%	17.6%
2	27.1%	22.2%
3	10.2%	17.6%
4	11.9%	10.6%
5	5.1%	5.2%
6	1.7%	4.3%
7-10	0.8%	5.7%
11 or more	0.0%	3.2%
Average	1.92	3.31
Median	2.00	2.00
Total Rounds of Golf Last Year	(n=118)	(n=913)
0	0.0%	0.2%
1-5	4.2%	4.4%
6-10	15.3%	11.7%
11-20	37.3%	25.5%
21-39	32.2%	26.6%
40-59	5.1%	16.0%
60+	5.9%	15.6%

The majority of the residents interviewed (99%) had previously golfed in the Columbia Valley. Almost three-fifths of the travellers interviewed planned to spend time golfing at the Copper Point (58%) and Windermere (58%) golf courses. Approximately one-third were planning to golf at Radium Resort (33%) and Eagle Ranch (33%) whereas fewer were planning to golf at Riverside (30%), Mountainside (25%), Greywolf (20%) or the Ridge at Copper Point (17%). Practical differences were found to exist between residents and the overall sample at the Eagle Ranch (33% residents, 44% overall), Greywolf (20% residents, 35% overall) and Windermere (58% residents, 27% overall, Table 33) golf courses.

The proportion of residents who were repeat visitors to the golf course at which they were interviewed (98%) was higher than that seen in the overall sample (80%). The average resident golf party size of 3.4 people was lower than the overall average golf party size of 4.0 people and the reported playing average of slightly over four rounds of golf on their trip was higher than that reported by the overall sample (2 rounds). In other words, compared to the overall sample, resident golfers were repeat visitors whose golf parties tended to be smaller in size but who on average played almost twice as many rounds during the trip on which they were interviewed (Table 33).

High satisfaction ratings were not forthcoming from residents who, perhaps due to frequent visitation to the courses, were more knowledgeable when it came to assessing the quality of the service they received and were able to offer a qualified response that would be worth taking note of. In fact, residents gave lower ratings for every category and the differences were considered practical in the following categories: overall experience (45% vs. 58% overall), staff/customer service (27% resident, 52% overall), food and beverage services (10% resident, 31% overall), quality of course (23% resident, 41% overall), and overall value for money (9% resident, 29% overall). Interestingly, both groups gave low satisfaction ratings to the cost of green fees (20% residents vs. 24% overall, Table 33).

Table 33. First time golfing in the Columbia Valley, golf course visitation intent, first time golfing at location, golf party size, rounds played at location and satisfaction levels.

	Residents	Overall
First Time Golfing in the Columbia Valley	(n=120)	(n=924)
Yes	0.8%	9.8%
No	99.2%	90.2%
Golf Course	(n=120)	(n=926)
The Springs	28.3%	32.6%
Radium Resort	32.5%	23.8%
Eagle Ranch	32.5%	44.1%
Greywolf	20.0%	34.7%
Copper Point	58.3%	50.1%
The Ridge @ Copper Point	16.7%	10.9%
Windermere	58.3%	26.9%
Mountainside	25.0%	24.0%
Riverside	30.0%	29.4%
Other	0.0%	9.0%
First Time Golfing At This Location	(n=120)	(n=912)
Yes	1.7%	19.6%
No	98.3%	80.4%
Average Golf Party Size (n=120, 924)	3.38	4.01
<i>Median</i>	4.00	3.00
Average rounds of golf played at this Location on this trip (n=120, 925)	4.32	2.03
<i>Median</i>	2.50	1.00
Percentage who were very satisfied with:		
Overall Experience (n=120, 914)	45.0%	58.1%
Staff/ Customer Service (n=119, 922)	26.9%	52.0%
Cost of Green Fees (n=120, 903)	20.0%	23.8%
Food and Beverage Services (n=97, 668)	10.3%	30.8%
Quality of Course (n=120, 922)	22.5%	41.0%
Overall Value for Money (n=120, 912)	9.2%	29.2%

Almost three-fifths of travellers indicated that their golf tee-time was somewhat (48%) or not important (9%) to them. On the other hand, the tee-time was considered quite important to over a quarter (30%) and in the extreme case very important to over a tenth (13%) of respondents. These results are very different from those for the overall sample. This is reflected in subsequent traveller responses to a question regarding flexibility in starting tee-times. Over three-quarters of residents (77%) were flexible and could have golfed at any other time of the day. On the other hand, just over one-fifth (23%) reported being inflexible in their ability to golf earlier or later that day. Over four-fifths (81%) of respondents were not willing to pay more or less to change their golf tee time. There were practical differences between residents and the overall sample in tee-time importance: very important (13% resident, 29% overall) and somewhat important (48% resident, 30% overall); flexibility in starting tee-times (could not have golfed at any other time (23% resident, 43% overall)), could have golfed earlier (65% resident, 39% overall); and in willingness to pay more/less to golf at a different time (19% resident, 30% overall, Table 34).

Table 34. Tee-time importance, flexibility in starting tee-times, willingness to pay more/less to change time, days and willingness to pay to golf between alternate days.

	Residents	Overall
Tee-time Importance	(n=120)	(n=918)
Very Important	13.3%	29.4%
Quite Important	30.0%	27.6%
Somewhat Important	47.5%	29.6%
Not Important	9.2%	13.4%
Flexibility in Starting Tee Times	(n=93)	(n=847)
I could not have golfed at any other time of the day	22.6%	43.2%
I could have golfed earlier today	64.5%	38.7%
I could have golfed later today	12.9%	18.1%
Would you have been willing to pay more/less to golf earlier/later TODAY?	(n=72)	(n=480)
Yes	19.4%	29.6%
No	80.6%	70.4%
Days	(n=120)	(n=929)
Monday to Wednesday	53.3%	48.8%
Thursday to Sunday	46.7%	51.2%
Would you have been willing to pay to play golf between [@Days]?	(n=118)	(n=917)
Yes	55.9%	50.8%
No	44.1%	49.2%

Organized Tours Golfer Characteristics

Amongst those interviewed in this study were visitors who were participants in a golf tour organized by a third party. The majority (86%) of these respondents were Alberta residents, approximately one-tenth (11%) were from BC whilst the rest were from the US (4%). All golf tour participants were aged 35 and over. Almost half (48%) were between 45 and 54 years of age, over a fifth (22%) were 65 years or older and close to another fifth (19%) were between 55 and 64 years of age. Over two-thirds (70%) of these respondents had completed college or university, with the most frequently stated education category being an initial university degree (41%). Practical differences were found to exist with respect to market origin: Alberta (86% tour group, 70% overall) and age: 35-44 (11% tour group, 22% overall), 45-54 (48% tour group, 36% overall) and 65 + (22% tour group, 7% overall, Table 35).

Table 35. Traveller demographics at Columbia Valley golf courses.¹

	Golf Tours	Overall
Origin	(n=28)	(n=940)
British Columbia	10.7%	19.3%
Alberta	85.7%	69.7%
Other Canada	0.0%	7.0%
US	3.6%	2.4%
Other International	0.0%	1.6%
Age²	(n=27)	(n=916)
Under 24 Years	0.0%	2.4%
25-34 Years	0.0%	8.2%
35-44 Years	11.1%	21.9%
45-54 Years	48.1%	36.5%
55-64 Years	18.5%	24.5%
65 Years or Older	22.2%	6.6%
Education	(n=27)	(n=913)
Less Than High School	0.0%	0.2%
High School	18.5%	11.1%
Some Technical, College or University	11.1%	8.7%
College or Technical Diploma	25.9%	25.8%
University Degree	40.7%	43.3%
Masters or a PhD Degree	3.7%	11.0%

1. Business travellers have been excluded.
2. Small sample size, interpret with caution.

The majority of travellers participating in golf tours that were interviewed in the Columbia Valley were travelling for leisure purposes (93%). The majority of these visitors (96%) were using a car/truck/ motorcycle as their primary mode of transportation. Practical differences were found to exist between tour group respondents and the overall sample in their use of accommodation. Tour group respondents were more likely to use hotel/motel (22% tour group, 11% overall), friends/relatives (22% tour group, 11% overall), resort (30% tour group, 15% overall), and less likely

to use a timeshare (4% tour group, 23% overall) or a second home (15% tour group, 29% overall, Table 36).

Table 36. The primary trip purpose, mode of transportation and primary accommodations of golf travellers.

	Golf Tours	Overall
Primary Trip Purpose	(n=28)	(n=820)
Leisure	92.9%	89.9%
Visiting Friends & Family	3.6%	8.7%
Work/Business Activity	3.6%	1.3%
Other	0.0%	0.1%
Mode of Transportation¹	(n=27)	(n=807)
Car/Truck/Motorcycle	96.3%	97.3%
RV/Camper	0.0%	2.2%
Bus	3.7%	0.5%
Bicycle	0.0%	0.0%
Other	0.0%	0.0%
Primary Accommodations¹	(n=27)	(n=799)
Hotel/Motel	22.2%	10.6%
Campground/RV	7.4%	7.0%
Friends OR Relatives	22.2%	11.0%
Other	0.0%	0.1%
B&B	0.0%	1.1%
Resort	29.6%	14.6%
Timeshare	3.7%	22.5%
Second Home	14.8%	28.8%
Rental House/Condo	0.0%	4.1%

1. Business travellers have been excluded in the table.

The Columbia Valley was the primary destination for a majority (89%) of tour group travellers. Practical differences were observed as a higher proportion of tour group travellers (33%) compared to the overall sample (22%) reported Radium Hot Springs as their primary destination (Table 37).

Table 37. Primary destination of golf travellers (place where spend the most time).¹

	Golf Tour (n=27) ²	Overall (n=807) ³
None, touring	7.4%	2.0%
Columbia Valley	88.9%	96.5%
Invermere	14.8%	18.5%
Fairmont Hot Springs	25.9%	30.1%
Radium Hot Springs	33.3%	22.4%
Columbia Valley (unspecified)	3.7%	9.3%
Panorama	11.1%	9.5%
Windermere	0.0%	6.4%
Canal Flats	0.0%	0.3%
Other Kootenay Rockies ²	3.7%	1.1%
Other BC	0.0%	0.1%
Alberta	0.0%	0.3%

1. Business travellers have been removed from the analysis.
2. Other Kootenay Rockies includes Kimberly (n=1).
3. Other Kootenay Rockies includes Cranbrook (n=2), Golden (n=2), Kimberly (n=3) and Kokanee Springs (n=1); other BC includes Christina Lake (n=1). Alberta includes Calgary (n=1) and Lake Louise (n=1).

The average golf tour party size was 11 people. One fifth (22%) of these respondents were travelling with children. Party sizes for those travelling without children were larger (12 people) compared to those travelling with children (eight people). Practical differences were found to exist with respect to average travel party size: overall (11 people in tour group, five people in overall sample), parties with children (12 people in tour group, four people in overall sample) and parties without children (eight people in tour group, seven people in overall sample, Table 38).

Table 38. Traveller party size at Columbia Valley golf courses.

	Golf Tours	Overall
<u>Average Travel Party Size</u>	<u>Average</u>	<u>Average</u>
Overall (n=27; 799)	11.15	4.94
Median	6.00	4.00
Parties without children (n=21; 589)	12.14	4.35
Median	7.00	3.00
Parties with children (n=6; 210)	7.67	6.60
Median	6.00	6.00
Proportion with Children (n=27; 799)	22.2%	26.3%

Tour group travellers spent an average of seven days away from home, seven days in BC and six days in the region during their trip. Practical differences were found when comparing the average length of time spent in the region: (six days for tour groups, seven days for overall sample), time in BC (seven days for tour groups, eight days for overall sample) and time spent away from home (seven days for tour groups, nine days for overall sample, Table 39).

Table 39. Trip duration.¹

	Golf Tours	Overall
No time in region - passing through (n=27, 799)	0.0%	0.9%
Average days in the region (n=27, 792)	6.02	7.16
<i>Median</i>	4.00	5.00
Average days in British Columbia (n=27, 799)	6.93	8.00
<i>Median</i>	5.00	6.00
Total days away from home (n=27, 807)	7.33	8.62
<i>Median</i>	5.00	7.00

1. Business travellers have been excluded in this table.

Respondents took an average of five overnight trips in the past year to purposely play golf. Two overnight golf trips were mentioned most frequently by almost a quarter (23%) of tour group respondents. Practical differences were found in the proportion of respondents taking 11 or more overnight golfing trips (15% tour group, 3% overall). The average number of trips taken by tour group travellers (4.8 trips) was also higher than the overall average of 3.3 trips (Table 40).

The highest proportion of respondents (31%) reported playing a total of 21-39 annual rounds of golf in the previous year, followed by another quarter (27%) who reported playing 60 or more round of golf during this time period. Practical differences were found amongst those who played 11-20 rounds (15% golf tours, 26% overall) and those who played more than 60 rounds (27% golf tours, 16% overall, Table 40).

The majority of the golf tour participants (96%) had previously golfed in the Columbia Valley. Greywolf (56%), Eagle Ranch (44%) and the Springs (41%) were the golf courses cited most frequently by respondents when asked about courses where they planned to spend time golfing. Practical differences were found to exist in golf course visitation: Radium Resort (37% golf tours, 24% overall), Greywolf (56% golf tours, 35% overall), Copper Point (37% golf tours, 50% overall, Table 41).

Table 40. Total overnight golfing trips and total rounds of golf last year.

	Golf Tours	Overall
Total Overnight Golfing Trips	(n=26)	(n=902)
0	3.8%	13.5%
1	19.2%	17.6%
2	23.1%	22.2%
3	15.4%	17.6%
4	7.7%	10.6%
5	7.7%	5.2%
6	3.8%	4.3%
7-10	3.8%	5.7%
11 or more	15.4%	3.2%
Average	4.77	3.31
Median	3.00	2.00
Total Rounds of Golf Last Year	(n=26)	(n=913)
0	0.0%	0.2%
1-5	0.0%	4.4%
6-10	15.4%	11.7%
11-20	15.4%	25.5%
21-39	30.8%	26.6%
40-59	11.5%	16.0%
60+	26.9%	15.6%

The majority of these golf tour members were repeat visitors to the golf course at which they were interviewed (89%). On the day of the interview, the respondents were in golf parties that averaged 14 people and played two rounds of golf. Respondents indicated that they would play an average of five rounds of golf on the trip during which they were interviewed. Practical differences were found to exist in golf party sizes (14.3 golf tours, 4.0 overall) as well as in rounds of golf played (1.7 golf tours, 2.0 overall, Table 41).

Almost half (48%) of the golf tour travellers indicated that they were very satisfied with their overall golf course experience. Less than 1 in 10 respondents (9%) indicated they were very satisfied with food and beverage services they experienced at the golf resort. Practical differences were found to exist with respect to satisfaction with: overall experience (48% golf tour; 58% overall), staff/customer service (37% golf tour, 52% overall), food and beverage services (9% golf tours, 31% overall) and quality of course (30% golf tour, 41% overall, Table 41).

Table 41. First time golfing in the Columbia Valley, golf course visitation intent, first time golfing at location, golf party size, rounds played at location and on trip and satisfaction levels.

	Golf Tours	Overall
First Time Golfing in the Columbia Valley	(n=27)	(n=924)
Yes	3.7%	9.8%
No	96.3%	90.2%
Golf Course	(n=27)	(n=926)
The Springs	40.7%	32.6%
Radium Resort	37.0%	23.8%
Eagle Ranch	44.4%	44.1%
Greywolf	55.6%	34.7%
Copper Point	37.0%	50.1%
The Ridge @ Copper Point	14.8%	10.9%
Windermere	18.5%	26.9%
Mountainside	22.2%	24.0%
Riverside	29.6%	29.4%
Other	11.1%	9.0%
First Time Golfing At This Location	(n=27)	(n=912)
Yes	11.1%	19.6%
No	88.9%	80.4%
Average Golf Party Size (today; 27, 924)	14.26	4.01
<i>Median</i>	8.00	3.00
Average Rounds of Golf Played at this Location (27, 925)	1.70	2.03
<i>Median</i>	1.00	1.00
Average Rounds of Golf Played on this trip (26, 804)	4.65	4.42
<i>Median</i>	4.00	4.00
Percentage who were very satisfied with:		
Overall Experience (n=27, 914)	48.1%	58.1%
Staff/Customer Service (n=27, 922)	37.0%	52.0%
Cost of Green Fees (n=25, 903)	16.0%	23.8%
Food and Beverage Services (n=22, 668)	9.1%	30.8%
Quality of Course (n=27, 922)	29.6%	41.0%
Overall Value for Money (n=26, 912)	26.9%	29.2%

Two thirds (67%) of respondents indicated that their current round of golf was part of a golfing package. This was substantially higher and different when compared to the overall sample where less than one tenth (8%) were currently using a package when they were interviewed (Table 42).

Green fees (100%) were included in every package that was purchased by these golfers for the various courses at which they planned to golf. Other package components included accommodation (61%), meals (22%), rental clubs (11%), lessons (6%) and other items (6%) not included on the survey list. Practical differences were found with respect to package components such as accommodation (61% golf tours, 78% overall), meals (22% golf tours, 12% overall) and more specifically for green fees for the Springs (56% golf tours, 33% overall), Radium Resort (56% golf tours, 28% overall), Eagle Ranch (33% golf tours, 48% overall), Greywolf (44% golf tours, 55% overall), and Windermere (17% golf tour, 5% overall) golf courses (Table 42).

Table 42. Golf package usage and package components.

	Golf Tours	Overall
Current Round of Golf Part of a Golfing Package	(n=27)	(n=803)
Yes	66.7%	7.5%
No	33.3%	92.5%
Package Components	(n=18)	(n=60)
Accommodation	61.1%	78.3%
Air Transportation	0.0%	0.0%
Meals	22.2%	11.7%
Rental Car	0.0%	0.0%
Other Transportation	0.0%	0.0%
Rental Clubs	11.1%	3.3%
Spa Treatments	0.0%	0.0%
Other Entertainment	0.0%	1.7%
Lessons	5.6%	1.7%
Green Fees	100.0%	96.7%
Other	5.6%	3.3%
Green Fees	(n=18)	(n=60)
The Springs	55.6%	33.3%
Radium Resort	55.6%	28.3%
Eagle Ranch	33.3%	48.3%
Greywolf	44.4%	55.0%
Copper Point	38.9%	33.3%
The Ridge @ Copper Point	16.7%	8.3%
Windermere	16.7%	5.0%
Mountainside	16.7%	16.7%
Riverside	22.2%	25.0%
Other	11.1%	8.3%

Over three-quarters of tour group travellers indicated that their golf tee-time was very (42%) or quite important (35%) to them. On the other hand, the tee-time was considered somewhat important to almost a fifth (19%) and in the extreme case not important to a small fraction (5%) of respondents. These results are quite different from those for the overall sample. Practical differences were found between tour group travellers and the overall sample in tee-time importance: very important (42% golf tours, 29% overall) and somewhat important (19% golf tours, 29% overall, Table 43).

Almost three-fifths of tour group respondents (56%) were flexible and could have golfed at any other time of the day. On the other hand, two-fifths (44%) reported being inflexible in their ability to golf earlier or later that day. Over four-fifths (86%) of these travellers were not willing to pay more or less to change their golf tee time. There were practical differences between tour group travellers and the overall sample in terms of willingness to pay more/less to golf at a different time (14% golf tours, 30% overall, Table 43).

Table 43. Tee-time importance, flexibility in starting tee-times, willingness to pay more/less to change time, days and willingness to pay to golf between alternate days.

	Golf Tours	Overall
Tee-time Importance	(n=26)	(n=918)
Very Important	42.3%	29.4%
Quite Important	34.6%	27.6%
Somewhat Important	19.2%	29.6%
Not Important	3.8%	13.4%
Flexibility in Starting Tee Times	(n=25)	(n=847)
I could not have golfed at any other time of the day	44.0%	43.2%
I could have golfed earlier today	44.0%	38.7%
I could have golfed later today	12.0%	18.1%
Would you have been willing to pay more/less to golf earlier/later TODAY?	(n=14)	(n=480)
Yes	14.3%	29.6%
No	85.7%	70.4%
Days	(n=27)	(n=929)
Monday to Wednesday	55.6%	48.8%
Thursday to Sunday	44.4%	51.2%

Conclusions

1. Travellers who were interviewed at golf courses in the Columbia Valley:

- Were predominantly from Alberta (80%),
- Were most likely to be over the age of 45 (68%),
- Were likely to have attained at least a college or technical diploma (80%),
- Were most likely to be travelling without children (74%),
- Were most likely to rate themselves as either very satisfied (81%) or somewhat satisfied (11%) with their trip in the Columbia Valley, and
- Were most likely to rate themselves as either very satisfied (57%) or somewhat satisfied (32%) with the overall value of the golf course at which they were interviewed.

Trip characteristics of travellers at the Columbia Valley golf courses showed that:

- The primary trip purpose was leisure (90%), followed by visiting family/friends (9%),
- Cars/trucks/motorcycles were the primary mode of transportation for most travellers (97%),
- Second homes were the primary accommodation type for 29% of travellers, followed by timeshares (23%),
- Over half of the travellers (54%) rated themselves as very flexible in terms of being able to golf earlier (35%) or later (19%) than their scheduled tee time,
- The three most frequent activities during the trip (besides golfing) were fine dining (64%), visiting a natural hot spring pool (52%) and shopping for local arts and crafts (48%),
- The three most frequent activities on trips for purposes other than leisure in the past year (besides golfing) were fine dining (70%), swimming (53%) and shopping for local arts and crafts (53%),
- Most travellers (84%) spent three weeks or more planning their trip, with the most common planning horizon being greater than 13 weeks (41%),
- Over two-fifths (43%) of travellers spent no more than two weeks pre-planning for the golf component of their trip,
- Previous visits to the Columbia Valley (87%), golf club/resort business websites (55%) and advice from friends and relatives (53%) were among the top information sources used before travel,
- Previous visits to the Columbia Valley (46%) and advice received from friends and relatives (30%) were the top information sources used during travel,
- The majority of travellers (99%) were spending time in the Columbia Valley as opposed to just passing through, and
- The average time spent in the Columbia Valley was seven days.

2. The profile of travellers can be applied:

- To primarily serve as a valuable resource of relevant market intelligence as it relates to the Columbia Valley and area golf product.
- To ensure that the information provided to golf resort users reflects the needs of golf travellers.
- To assist in business planning for existing and potentially new tourism businesses in the Columbia Valley and Kootenay Rockies region by providing detailed profiles of current valley golf clientele.
- To design and refine a marketing plan for Columbia Valley golf courses utilizing information and key learnings from the traveller profile, destination imagery, golf destination competitiveness analysis as well as traveller travel planning behaviours.
- To evaluate the potential of refining services provided by Columbia Valley golf courses to meet golfers' changing needs identified in the research.
- To design package offerings with other golf and/or non-golf products in the Columbia Valley and nearby area.

Limitations

1. These results are representative of travellers who were interviewed at various golf courses in the Columbia Valley between June 1 and September 7, 2008. The results do not represent a profile of golfers to Columbia Valley Golf Courses for the whole golf season. Applying these results to the remaining months of the season could over-estimate the volume of certain golf travellers who may be prone to travel in certain months as the study was completed during the peak golf season. In addition, trip and traveller characteristics of travellers at other times of the year could differ from those interviewed during the study period.
2. Some of the statistics contained within this report were produced with small sample sizes; consequently some of the results should be treated with caution.
3. Results presented here do not represent the full range of analysis that can be completed with the data collected. For example, a profile of travellers visiting friends and family versus those that were travelling for leisure could be developed. Please contact Alison Aspinall, Research and Planning Tourism British Columbia (Alison.Aspinall@tourismbc.com) for more information on obtaining custom reports using this data.

Appendices

Appendix A - Interviewer schedule and interviews completed

Appendix B - Questionnaires

Appendix C - Response bias testing

Appendix D - Reasons for dissatisfaction with overall value of golf course

Appendix E - Positive images of the Columbia Valley as a vacation destination

Appendix F - Negative images of the Columbia Valley as a vacation destination

Appendix G - Unique Images of British Columbia as a golf destination

Appendix H - Comments from e-mail follow-up survey

Appendix A - Interview Schedule and Interviews Completed

Table A1. The day and number of travellers approached, the number who agreed to the interview, the number of residents, number of refusals, number travelling in a tour group and the number of independent tourists interviewed at Columbia Valley golf courses during the study period.

	Columbia Valley Golfers Interviewed (June 1 - July 15, 2008)								
	Number of People Approached	Agree to Interview	Previous Participant	Members	Refusals	Potential Sample	Number of Residents	Part of Tour Group ¹	Tourists
June 1	16	14	0	0	2	14	1	6	7
June 2	22	22	0	0	0	22	1	2	19
June 3	20	19	3	0	1	16	0	0	16
June 4	13	10	0	0	3	10	0	2	8
June 7	16	12	1	0	4	11	0	0	11
June 8	12	9	0	2	3	7	1	1	5
June 9	15	12	0	0	3	12	0	0	12
June 10	4	3	0	0	1	3	1	0	2
June 13	16	13	0	1	3	12	0	0	12
June 14	23	19	0	0	4	19	0	0	19
June 15	26	18	0	0	8	18	0	2	16
June 16	22	15	0	0	7	15	0	1	14
June 19	21	13	0	0	8	13	0	0	13
June 20	23	22	0	1	1	21	0	2	19
June 21	9	8	0	0	1	8	0	0	8
June 22	9	9	0	4	0	5	0	0	5
June 23	14	11	0	0	3	11	1	0	10
June 25	31	28	0	10	3	18	1	1	16
June 26	24	21	0	7	3	14	0	1	13
June 27	24	17	2	0	7	15	0	1	14
June 28	39	31	2	11	8	18	1	0	17
June 29	26	18	1	3	8	14	0	0	14
July 1	20	20	0	11	0	9	0	0	9
July 2	20	18	0	8	2	10	1	1	8
July 3	20	16	0	0	4	16	1	0	15
July 4	16	14	1	6	2	7	0	0	7
July 7	37	34	1	19	3	14	0	0	14
July 8	15	13	0	11	2	2	0	0	2
July 9	17	13	1	0	4	12	0	0	12
July 14	12	11	0	8	1	3	0	0	3
July 15	28	17	2	0	11	15	0	0	15

Columbia Valley Golfers Interviewed (July 16 - August 15, 2008)									
	Number of People Approached	Agree to Interview	Previous Participant	Members	Refusals	Potential Sample	Number of Residents	Part of Tour Group ¹	Tourists
July 16	16	11	0	4	5	7	0	0	7
July 17	10	9	0	4	1	5	0	1	4
July 18	16	12	0	3	4	9	0	0	9
July 19	26	15	1	4	11	10	1	0	9
July 20	72	48	4	18	24	26	3	1	22
July 21	59	44	0	8	15	36	8	0	28
July 22	109	79	14	12	30	53	6	0	47
July 23	25	23	4	0	2	19	0	1	18
July 25	59	43	7	9	16	27	7	1	19
July 26	38	22	6	2	16	14	2	0	12
July 27	39	24	0	13	15	11	2	1	8
July 28	45	22	2	2	23	18	4	1	13
July 30	27	25	1	19	2	5	0	0	5
July 31	70	38	4	7	32	27	6	0	21
August 1	27	18	0	10	9	8	1	0	7
August 2	75	39	10	5	36	24	4	1	19
August 3	49	27	3	10	22	14	3	0	11
August 4	9	7	0	0	2	7	0	0	7
August 5	10	8	1	0	2	7	0	0	7
August 6	60	33	5	11	27	17	2	1	14
August 7	62	37	7	11	25	19	4	0	15
August 8	36	18	2	7	18	9	3	0	6
August 9	42	23	4	8	19	11	2	0	9
August 12	43	18	0	2	25	16	3	0	13
August 13	54	31	7	8	23	16	5	0	11
August 14	40	21	2	8	19	11	5	0	6
August 15	56	39	2	13	17	24	3	0	21

Columbia Valley Golfers Interviewed (August 17 - September 7, 2008)									
	Number of People Approached	Agree to Interview	Previous Participant	Members	Refusals	Potential Sample	Number of Residents	Part of Tour Group ¹	Tourists
August 17	20	9	0	4	11	5	3	0	2
August 18	41	19	0	11	22	8	5	0	3
August 19	40	28	2	8	12	18	1	0	17
August 20	19	11	0	4	8	7	1	0	6
August 21	23	7	1	2	16	4	2	0	2
August 24	35	27	1	19	8	7	2	0	5
August 25	20	14	1	3	6	10	1	0	9
August 26	19	10	0	2	9	8	2	0	6
August 27	16	7	1	1	9	5	2	0	3
August 30	27	10	0	2	17	8	4	0	4
August 31	3	1	0	1	2	0	0	0	0
Sept. 1	12	9	0	5	3	4	2	0	2
Sept. 2	10	6	0	2	4	4	3	0	1
Sept. 5	13	7	0	2	6	5	1	0	4
Sept. 6	27	9	1	1	18	7	3	0	4
Sept. 7	22	8	0	2	14	6	5	0	1
Total	2,131	1,416	107	369	715	940	120	28	792

Appendix B - Questionnaires

Interview Questions

Interviewer _____

Date _____

COLUMBIA VALLEY GOLF – CV

Good morning / afternoon / evening. My name is _____ and I'm conducting an interview on behalf of the Columbia Valley Golf Association and Tourism British Columbia. We are interested in speaking with golfers about their travel experiences in the Columbia Valley.

1. Would you have approximately six to eight minutes to answer some questions? If you participate, we would like to give you a complimentary gift for your time.

YES NO

2. Have you or anybody in your travel party been previously interviewed at a Columbia Valley Golf course on this trip? (Have map to show participating courses - this does not include the 1st tee form).

YES NO

3. Are you a member here at <<insert course name>>?

YES NO If yes, go to Box 1.

4 Where do you live (usual place of residence)?

Province _____ OR State _____ OR Country (other international) _____

IF FROM BC 5 Are you a resident of Columbia Valley? The Columbia Valley region includes the area south of Spillmacheen and north of Canal Flats.

NO YES Go to Box 2.

6. Are you part of an organized golf tour? Golf tour includes participants of a tour organized by a third party.

NO YES

Box 1. Members

• Including yourself, how many people were in your golf party today? Golf party includes the number of people that you purposely came to golf with today.

_____ DK/NR

• Please rate your satisfaction with <<insert course name>> on each of the following using a scale of 1 to 5, where one is not at all satisfied and five is very satisfied.

	Not Satisfied			Very Satisfied		DK/NR
	1	2	3	4	5	
STAFF/CUSTOMER SERVICE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COST OF GREEN FEES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOOD AND BEVERAGE SERVICES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QUALITY OF COURSE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL VALUE FOR MONEY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL EXPERIENCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

• What was your tee time today?

_____ DK/NR

• Last year, in a typically week how many rounds of golf did you play?

_____ DK/NR

• How many overnight trips did you take to purposely play golf in the past 12 months? (Please include this trip in applicable).

_____ DK/NR

THANK YOU!

Interviewer _____

Date _____

COLUMBIA VALLEY GOLF – CV

Box. 2 Locals

- Is this your first time golfing in the Columbia Valley?

YES NO

- Which of following courses in the Columbia Valley have you or do you plan on golfing at during this trip? (**Consult course map**) (Select all that apply)

A. THE SPRINGS	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	F. RIDGE @ COPPER POINT	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
B. RADIUM RESORT	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	G. WINDERMERE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
C. EAGLE RANCH	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	H. MOUNTAINSIDE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
D. GREYWOLF	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	I. RIVERSIDE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
E. COPPER POINT	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR				

- Is this your first time golfing at <<insert course name>>?

YES NO

- On this trip, how many rounds of golf will you play here at <<insert course name>>?

_____ DK/NR

- Including yourself, how many people were in your golf party today? Golf party includes the number of people that you purposely came to golf with today.

_____ DK/NR

- Please rate your satisfaction with <<insert course name>> on each of the following using a scale of 1 to 5, where one is not at all satisfied and five is very satisfied.

	Not Satisfied			Very Satisfied		
	1	2	3	4	5	DK/NR
STAFF/CUSTOMER SERVICE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COST OF GREEN FEES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOOD AND BEVERAGE SERVICES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QUALITY OF COURSE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL VALUE FOR MONEY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL EXPERIENCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- What was your tee time today?

_____ DK/NR

- How important was tee time availability when choosing to play at <<Insert course name>>? (Choose one of the following)

VERY IMPORTANT
 QUITE IMPORTANT
 SOMEWHAT IMPORANT
 NOT IMPORTANT
 DK/NR

- Which of the following statements best describes your flexibility in your starting tee time today? (Select most appropriate answer)

I COULD NOT HAVE GOLFED AT ANY OTHER TIME OF THE DAY → Go to Q28
 I COULD HAVE GOLFED EARLIER TODAY → Go to Q27
 I COULD HAVE GOLFED LATER TODAY → Go to Q27
 DK/NR → Go to Q28

Interviewer _____

Date _____

COLUMBIA VALLEY GOLF – CV

Box 2. Locals (Con't)

- Last year, in a typically week how many rounds of golf did you play?
 _____ DK/NR

- How many overnight trips did you take to purposely play golf in the past 12 months? (Please include this trip in applicable).
 _____ DK/NR

- In which of the following age category are you?
 A. UNDER 24 YEARS E. 55-64 YEARS
 B. 25-34 YEARS F. 65 YEARS OR OLDER
 C. 35-44 YEARS G. DK/NR
 D. 45-54 YEARS

- What is the highest level of education that you have completed?
 A. LESS THAN HIGH SCHOOL E. UNIVERSITY DEGREE
 B. HIGH SCHOOL F. MASTERS/PHD DEGREE
 C. SOME TECHNICAL COLLEGE OR UNIVERSITY G. OTHER
 D. COLLEGE OR TECHNICAL DIPLOMA H. DK/NR

- Gender of respondent
 MALE FEMALE

THANK YOU!

To start, we have a few questions about your current trip.

7. What is the **primary** purpose of your trip? Is it for Leisure, Visiting Friends and Family or Business?

- LEISURE
- VISITING FRIENDS & FAMILY
- WORK/BUSINESS ACTIVITY
- OTHER (SPECIFY _____)
- DK/NR

8. What leisure activity/ies was the **primary motivation for this trip**?

_____ NONE DK/NR

9. What is your primary destination (place that you will spend the most time)?

_____ NONE, TOURING DK/NR

10. Have you or are you planning to travel by air on this trip?

- YES – Return Trip
- YES – One way in
- YES – One way out
- NO
- DK/NR

IF Q.10= YES What city did you fly into? _____ Out of _____?

11. What is your primary (most often used) mode of transportation while in BC on this trip?

- CAR/TRUCK/MC RV BUS OTHER _____

12. Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? _____ days (**Consult calendar; include day left and day returning**)

13. How many of those days will be spent travelling in British Columbia? _____ days

14. How many days will be spent in the Columbia Valley? (**Consult regional map**) _____ days

15. What is your **primary** (most time spent) leisure activity while in Columbia Valley?

_____ NONE DK/NR

16. Is this your first time golfing in the Columbia Valley?

YES NO

17. Which of following courses in the Columbia Valley have you or do you plan on golfing at during this trip? (**Consult course map**) (Select all that apply)

A. THE SPRINGS	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	F. RIDGE @ COPPER POINT	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
B. RADIUM RESORT	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	G. WINDERMERE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
C. EAGLE RANCH	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	H. MOUNTAINSIDE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
D. GREYWOLF	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR	I. RIVERSIDE	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR
E. COPPER POINT	<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> DK/NR				

Skip if Q. 12=1 18. Which of the following best describes your **primary** (most often used) type of accommodation on this trip?

<input type="checkbox"/> HOTEL/MOTEL	<input type="checkbox"/> RESORT
<input type="checkbox"/> TIME SHARE	<input type="checkbox"/> CAMPGROUND/RV
<input type="checkbox"/> BED & BREAKFAST	<input type="checkbox"/> SECOND HOME
<input type="checkbox"/> FRIENDS OR RELATIVES	<input type="checkbox"/> OTHER _____

19. Including yourself, how many people are in your travel party on this trip? How many are children under 18 and how many are adults? (Travel party includes individual who have the same itinerary and/or the same expenditures. Travel party may not be the same as your golf party today.)

_____ Adult(s) _____ Child(ren) (under 18) = _____ Total

OVERNIGHTERS 20. In Canadian dollars, what was your travel party's total expenditure yesterday, including accommodation?

\$ _____ NONE DK/NR

DAY TRIPPERS 20. In Canadian dollars, what will be your travel party's total expenditure today?

\$ _____ NONE DK/NR

I would like to ask you some questions about your golf experience at <<Insert Course Name>> today.

21. Is this your first time golfing at <<insert course name>>?

YES NO

22. On this trip, how many rounds of golf will you play here at <<insert course name>>?

_____ DK/NR

23. **In total**, how many rounds of golf will you play here **on this trip**?

_____ DK/NR

24. Including yourself, how many people were in your golf party today? Golf party includes the number of people that you purposely came to golf with today.

_____ DK/NR

Interviewer _____

Date _____

COLUMBIA VALLEY GOLF – CV

25. Please rate your satisfaction with <<insert course name>> on each of the following using a scale of 1 to 5, where one is not at all satisfied and five is very satisfied.

	Not Satisfied			Very Satisfied		DK/NR
	1	2	3	4	5	
STAFF/CUSTOMER SERVICE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COST OF GREEN FEES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FOOD AND BEVERAGE SERVICES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QUALITY OF COURSE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL VALUE FOR MONEY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL EXPERIENCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. Was this current round of golf part of a golfing package?

- YES → Go to Q27 NO → Go to Q28

27. What components were included in the golf package? (Check all that apply).

- ACCOMODATION MEALS ENTERTAINMENT SPA RENTAL CAR
- GREEN FEES AIR TRANSPORTATION OTHER TRANSPORT LESSONS RENTAL CLUBS
- ▶ WHICH COURSES?
- A. THE SPRINGS G. WINDERMERE OTHER _____
- B. RADIUM RESORT H. MOUNTAINSIDE
- C. EAGLE RANCH I. RIVERSIDE
- D. COPPER POINT J. GREYWOLF
- E. RIDGE @ COPPER POINT
- F. OTHER _____

28. What was your tee time today?

_____ DK/NR

29. How important was tee time availability when choosing to play at <<Insert course name>>? (Choose one of the following)

- VERY IMPORTANT
- QUITE IMPORTANT
- SOMEWHAT IMPORANT
- NOT IMPORTANT
- DK/NR

30. Which of the following statements best describes your flexibility in your starting tee time today? (Select most appropriate answer)

- I COULD NOT HAVE GOLFED AT ANY OTHER TIME OF THE DAY → Go to Q32
- I COULD HAVE GOLFED EARLIER TODAY → Go to Q30
- I COULD HAVE GOLFED LATER TODAY → Go to Q30
- DK/NR → Go to Q32

31. Would you have been willing to pay \$\$\$\$ to golf at <<insert time of day category>> today?

- YES NO

32. Would you have been willing to pay \$\$\$\$ to golf on <<insert day of week>>?

- YES NO

Now I would like to ask a few more questions about yourself.

33 Last year, how many rounds of golf did you play?

- 0 1-5 6-10 11-20 21-39 40-59 60+ DK/NR

34 How many overnight trips did you take to purposely play golf in the past 12 months? (Please include this trip in applicable).

_____ DK/NR

Interviewer _____

Date _____

COLUMBIA VALLEY GOLF – CV

35 In which of the following age category are you?

- A. UNDER 24 YEARS
- B. 25-34 YEARS
- C. 35-44 YEARS
- D. 45-54 YEARS
- E. 55-64 YEARS
- F. 65 YEARS OR OLDER
- G. DK/NR

36 What is the highest level of education that you have completed?

- A. LESS THAN HIGH SCHOOL
- B. HIGH SCHOOL
- C. SOME TECHNICAL COLLEGE OR UNIVERSITY
- D. COLLEGE OR TECHNICAL DIPLOMA
- E. UNIVERSITY DEGREE
- F. MASTERS/PHD DEGREE
- G. OTHER
- H. DK/NR

37. Gender of respondent

- MALE
- FEMALE

38. As a follow-up to this interview, we would like to contact you after your trip to inquire about the rest of your trip to British Columbia. Participation would involve completing a questionnaire that will be emailed to you. In exchange, we are pleased to offer you a chance to win a golf vacation for 2 to the Columbia Valley valued at over \$2500.00. All contact information will be kept confidential and only used for this study. Would you be willing to participate?

- YES
- NO

39. May I have your email address?

_____ @ _____

Thank you!

Follow-Up Questions



Your opinions are important

Tourism British Columbia and the Columbia Valley Golf Association are working together to better understand your experiences, activities and impressions of your trip in the Columbia Valley, British Columbia. The Columbia Valley region includes the area south of Spillimacheen and north of Canal Flats and includes Radium Hot Springs, Invermere, Panorama, Windermere, and Fairmont Hotsprings

If you have travelled within the Columbia Valley, British Columbia more than once this year, please tell us about the trip during which you were interviewed while you were golfing and agreed to participate in this survey.

By completing and submitting this survey, you will be entered in a draw to win a Columbia Valley Golf Vacation for! This Grand Prize includes rounds of golf at each of the nine Columbia Valley Golf Courses two nights accommodation at Radium Hot Springs Resort, nights accommodation at Panorama Mountain Village, and nights accommodation at Fairmont Hot Springs Resort.

To begin the survey, click "**NEXT**" at the bottom of the page. Clicking "reset" will clear your responses only for that page. To return to previously completed questions, use the back arrow button located in Internet Explorer (or your default web browser) at the top of your screen. Software limitations will not allow you to save a partially completed survey on your desktop. If you close the survey before submitting it, you will have to restart the survey. If you have any questions, or experience difficulty completing this survey, please e-mail the survey administrator, Nancy Radman, at Nancy.Radman@tourismbc.com or call (604) 775-0931. Please respond by **November 7th 2008**

About your trip we encountered you on...

While golf may have been just a day trip from your home or part of a larger trip within British Columbia, this section asks questions about characteristics of all your time away from home.

1. How many days were you away from your residence on your entire trip?

_____ day(s) away from residence

2. Of the above days how many were spent in British Columbia?

If you are from British Columbia and you spent your whole vacation within the province, this should be the same as your previous response.

_____ day (s) in British Columbia

3. When planning this trip, did you and/or your travel party consider other destinations or routes?
- Yes [Goto question Q4]
 - No [Goto question Q6]
 - Don't Know [Goto question Q6]

4. What other destination or routes did you consider when planning this trip? (Please list up to three)

1 _____
 2 _____
 3 _____

5. In general, what made you and/or your travel party choose your primary destination over the alternatives you listed previously?

6. We would like to know which activities you have participated in while on trips you have taken. From the below...

A. Which activities did you and/or your travel-party (those you travelled with and that you also shared travel expenses with) participate in while on this trip?

B. Which activities have you and or your travel party participated in while on other leisure trips in the past year?

	A	B
Golfing	<input type="radio"/>	<input type="radio"/>
Participating in fine dining	<input type="radio"/>	<input type="radio"/>
Shopping for locals arts and crafts	<input type="radio"/>	<input type="radio"/>
Attending a festival, fair or exhibition	<input type="radio"/>	<input type="radio"/>
Mountain biking	<input type="radio"/>	<input type="radio"/>
Cycling (other than mountain biking)	<input type="radio"/>	<input type="radio"/>
Hiking/Climbing	<input type="radio"/>	<input type="radio"/>
Rock climbing	<input type="radio"/>	<input type="radio"/>
Wildlife viewing (whale, bear, birds, etc.)	<input type="radio"/>	<input type="radio"/>
Fishing	<input type="radio"/>	<input type="radio"/>
Kayaking/canoeing	<input type="radio"/>	<input type="radio"/>
Boating (other than Kayaking/canoeing)	<input type="radio"/>	<input type="radio"/>
Swimming	<input type="radio"/>	<input type="radio"/>
Horseback riding	<input type="radio"/>	<input type="radio"/>
First Nations attraction or event	<input type="radio"/>	<input type="radio"/>
Museum, heritage, or historic site	<input type="radio"/>	<input type="radio"/>
Family attraction (mini golf, zoo, etc.)	<input type="radio"/>	<input type="radio"/>
Visiting a winery, brewery, or cidery	<input type="radio"/>	<input type="radio"/>
Municipal, provincial, or natural area outside a park	<input type="radio"/>	<input type="radio"/>
City or municipal facility (swimming pool, performing arts centre etc.)	<input type="radio"/>	<input type="radio"/>
A spa	<input type="radio"/>	<input type="radio"/>
A natural hot spring pool	<input type="radio"/>	<input type="radio"/>
Friends and/or relatives	<input type="radio"/>	<input type="radio"/>
Other _____	<input type="radio"/>	<input type="radio"/>

7. How far in advance did you start planning (started gathering information on and making arrangements) for this trip?

Please select the most appropriate response.

- | | |
|----------------------------------------|----------------------------------|
| <input type="radio"/> Day of departure | <input type="radio"/> 9-12 weeks |
| <input type="radio"/> 1-6 days | <input type="radio"/> 13+ weeks |
| <input type="radio"/> 1-2 weeks | <input type="radio"/> Don't know |
| <input type="radio"/> 3-8 weeks | |

8. How far in advance did you start planning the golf component of your trip?

Please select the most appropriate response.

- | | |
|----------------------------------------|----------------------------------|
| <input type="radio"/> Day of departure | <input type="radio"/> 9-12 weeks |
| <input type="radio"/> 1-6 days | <input type="radio"/> 13+ weeks |
| <input type="radio"/> 1-2 weeks | <input type="radio"/> Don't know |
| <input type="radio"/> 3-8 weeks | |

9. We would like to know the information sources you used to plan your trip before and during your trip. This includes information where to stay, what route to take, where to eat and/or what to see and do.

A. What information sources did you use **before** your trip? Please select all that apply.

B. What were the **three most useful** information sources you used **before** your trip? Please select top three only.

C. What information sources did you use **during** your trip? Please select all that apply.

	A	B	C
Previous visit(s) to the Columbia Valley	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Golf show(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advice from friends/relatives/acquaintances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1-800-HelloBC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
www.ColumbiaValleyGolf.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
www.HelloBC.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A local or regional tourism website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traveller review website (i.e. tripadvisor.com, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other websites (other than those mentioned above)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ad in Tourism/Travel/Visitor Guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Magazines/Newspapers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1st Tee Golf Vacations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Tour operators/travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitor Centres	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Referrals from Tourism businesses (i.e. from an accommodation property)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. On the trip where you went golfing, what do you estimate your travel party's (those you travelled with, that you also shared travel expenses with) total expenditures were while in the Columbia Valley in **Canadian Dollars**? Please include all purchases, taxes and tips except long-haul flights. If you pre-paid any items prior to leaving on your trip (e.g. accommodation, tours, etc.), please include these in your estimate.

\$ _____

11. Approximately what percentage of your party's total expenditures was attributed to the following categories? Please fill in the appropriate proportions, **excluding long-haul flights. Ensure all responses equal 100%.**

	% of Total
Accommodation (hotels, motels, lodge, camping/RV fees, etc.)	_____
Transportation (flights within BC, vehicle rental, gas, repairs, ferry, taxi, etc.)	_____
Food & beverage (include any taxes and tips paid)	_____
Shopping (clothing, gifts, film, books, etc.)	_____
Attractions (admission, shows, tours, etc.)	_____
Outdoor recreation (golfing, park pass, nature guide, etc.)	_____
Other entertainment (spa, etc.)	_____
Other	_____

About Columbia Valley

This section asks questions about your impressions and experiences while golfing in the Columbia Valley region. The Columbia Valley region includes the area south of Spillimacheen and north of Canal Flats and includes Radium Hot Springs, Invermere, Panorama, Windermere, and Fairmont Hot Springs

12. What positive and/or negative images/characteristics come to mind when you think of the **Columbia Valley** as a vacation destination?

Please type up to three responses for each.

	Positive	Negative
1	_____	_____
2	_____	_____
3	_____	_____

13. Which of the following courses in the Columbia Valley did you golf at on your trip? Please select all that apply

- | | |
|----------------------------------------|------------------------------------------------|
| <input type="checkbox"/> The Springs | <input type="checkbox"/> Ridge at Copper Point |
| <input type="checkbox"/> Radium Resort | <input type="checkbox"/> Windermere |
| <input type="checkbox"/> Eagle Ranch | <input type="checkbox"/> Mountainside |
| <input type="checkbox"/> Greywolf | <input type="checkbox"/> Riverside |
| <input type="checkbox"/> Copper Point | |

14. How many rounds of golf did you play during your visit to the **Columbia Valley**?

of 18 hole rounds _____

of 9 hole rounds _____

15. Apart from any cost or budgetary considerations, what did you consider first when planning the golf component of your trip?

Please select the **most appropriate** response.

- Thought about the destination and then thought about golfing and other activities
- Started by considering a golf trip and then started thinking about a destination
- Looked for package deals without considering any destinations, activities or travel experiences
- Someone else planned the trip
- Considered something else first (please specify) _____
- Don't Know/Not Sure

16. **A.** Using the table below, how **important** were each of the following factors to you while you when **planning and purchasing your trip** to the Columbia Valley?

B. Using the same table, how **satisfied** were you with each of the following factors when considering your trip to the Columbia Valley?

Planning trip	A. Importance to me:					B. My satisfaction with:				
	Very important		Neither		Not at all important	Very satisfied		Neither		Not at all satisfied
Finding detailed information in a printed brochure from resort offering golf	<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"/>
Finding detailed information in a printed brochure from resort offering golf	<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"/>
Finding detailed information about BC golf trips on websites	<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"/>
Understanding the number of golf courses offered in the Columbia Valley	<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"/>
Having easy accessibility to destination from a major airport	<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"/>
Understanding what other people thought of past golf day/overnight golf trips (testimonials)	<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"/>
Finding detailed information in a printed brochure from resort offering golf	<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"/>
Having a number of activities available (other than golf)	<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"/>
Participating in a special event and/or festival	<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"/>

17. Overall, how satisfied or dissatisfied were you with your trip in the Columbia Valley? Please select **one response only**.

- Very Dissatisfied [Goto question Q18]
- Somewhat Dissatisfied [Goto question Q18]
- Neither Satisfied or Dissatisfied [Goto Q18]
- Somewhat Satisfied [Goto question Q19]
- Very Satisfied [Goto question Q19]
- Don't know [Goto question Q19]

18. Please explain why you were **dissatisfied** with your trip to the Columbia Valley:

19. How likely would you be to **recommend** the Columbia Valley as a place to visit for family and friends?

Please **select one response only**.

- Not likely at all
- Not likely
- Somewhat likely
- Likely
- Very likely
- Don't know

20. Given your experience in the Columbia Valley, in the next **two** years how likely are you to return to the Columbia Valley region for another leisure trip?

Please **select one response only**.

- Not likely at all
- Not likely
- Somewhat likely
- Likely
- Very likely
- Don't know

21. In the next **two** years, how likely is it that you will take another trip in British Columbia? Please **select one response only**.

- Not Likely at All
- Not Likely
- Somewhat Likely
- Likely
- Very Likely
- Don't Know

About <<Golf Course Intercepted At>>

This section asks questions about your impressions and experiences while golfing at Radium Resort.

22. Did your entire **travel party** play golf on the trip?

- Yes [Goto question Q24]
- No [Goto question Q23]

23. What activities did those **who did not golf** do on this trip?

24. From the table below, please consider:

A. How **important** each of the following aspects were to you while choosing Radium Resort?

B. How **satisfied** were you with each of the following aspects at Radium Resort?

If a service was not available at the golf course on the trip in which we encountered you on, please mark **N/A (Not applicable)**.

Services provided at Radium Resort...	A. Importance to me:					B. My satisfaction with:				
	Very important		Neither		Not at all important	Very satisfied		Neither		Not at all satisfied
Considered when choosing golf course										
Quality of the course	<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"/>
Golf shop and clubhouse facility	<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"/>
Equipment rental and repair services	<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"/>
Customer service at the golf shop/clubhouse	<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"/>
Golf carts	<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"/>
Adult lessons (golf)	<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"/>
Driving range	<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"/>
Cost of green fees	<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"/>
On-site food and beverage	<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"/>
On-site accommodation	<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"/>
Reputation of Course	<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"/>
Course condition	<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"/>

25. Overall, how **satisfied or dissatisfied** were you with the overall **value** at Radium Resort?

- Very Dissatisfied [Goto question Q26]
- Somewhat Dissatisfied [Goto Q26]
- Neither Satisfied or Dissatisfied [Goto question Q26]
- Somewhat Satisfied [Goto question Q27]
- Very Satisfied [Goto question Q279]
- Don't know [Goto question Q27]

26. Please explain why you were **dissatisfied** with the overall value at Radium Resort:

About British Columbia as a overnight trip destination...

This section asks for your opinions on British Columbia as a golf destination

27. What are the **unique characteristics** of British Columbia as a golf trip destination? "Unique characteristics" are those that make British Columbia different from other destinations.

Please type **up to three** unique characteristics.

1. _____
2. _____
3. _____

28. In the next two years, how likely is that you will take another trip in British Columbia with the main motivation of the trip being to **golf**?

Please select **one response** only.

- Not Likely at All [Goto question Q31]
- Not Likely [Goto question Q31]
- Somewhat Likely
- Likely
- Very Likely
- Don't Know

29. What destinations **within British Columbia** would you consider for future golf vacations (other than the Columbia Valley)?

Please check **None** if you are **not** considering another golf vacation **within BC**.

- 1 _____ [Goto question Q30]
- 2 _____ [Goto question Q30]
- 3 _____ [Goto question Q30]
- None [Goto question Q31]

30. Comparing **Destination 1** to the **Columbia Valley**, please indicate if you feel **Destination 1** would be **BETTER** or if the **Columbia Valley** would be **BETTER**, they would be **EQUAL**, or if **NEITHER** would be better for each of the following aspects.

	CV Better	Equal	None
Good value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for outdoor recreational activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for golfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place to relax and unwind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for heritage and historical sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for Aboriginal cultural activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendly people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good opportunities to visit provincial/national parks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plenty of things that appeal to children	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safe and clean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beautiful landscape	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Excellent shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Excellent restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels quite different from home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fun nightlife and entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lots of different activities and things to do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

31. What destinations **outside of British Columbia** would you consider for future golf vacations?

Please check **None** if you are **not** considering another golf vacation **outside BC**.

- 1 _____ [Goto question Q32]
- 2 _____ [Goto question Q32]
- 3 _____ [Goto question Q32]
- None [Goto question Q34]

32. Comparing **Destination outside of BC 1.** to the Columbia Valley, please indicate if you feel **Destination 1** would be **BETTER** or if the Columbia Valley would be **BETTER**, they would be **EQUAL**, or if **NEITHER** would be better for each of the following.

	CV Better	Equal	None
Good value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for outdoor recreational activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for golfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place to relax and unwind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for arts and culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for heritage and historical sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good place for Aboriginal cultural activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendly people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good opportunities to visit provincial/national parks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plenty of things that appeal to children	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safe and clean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beautiful landscape	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Excellent shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Excellent restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feels quite different from home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fun nightlife and entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lots of different activities and things to do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

33. What destinations outside of British Columbia would you consider for future golf vacations? Please check **None** if you are not considering another golf vacation outside BC.

- Destination 1 _____
- Destination 2 _____
- Destination 3 _____
- None

About you...

34. Who was in your immediate travel party (those you travelled with and that you also shared expenses with) on this trip?

Please start with yourself and fill in their relationship to you and their age.

Who? <i>e.g. wife, husband, daughter, son, parent, friend....</i>	Age <i>(in years)</i>	Gender <i>(M=Male or F=Female)</i>
1. <u>Myself</u>	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____

35. Are you a member of a golf club?

Please select **one response** only.

- Yes - Private Club
- Yes - Semi-private/public Club
- Not a member
- Don't know

36. From the selection of education choices below, which best describes the level you have attained?

Please select **one response** only.

- Less than high school
- High school
- Some technical college or university
- College or technical diploma
- University degree
- Masters/PhD degree
- Other _____

37. From the selection below, which best describes (before taxes and in Canadian dollars) your annual household income?

Please select **one response** only.

- Less than \$25,000
- \$25,000 to \$49,999
- \$50,000 to \$64,999
- \$65,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- I prefer not to answer
- Don't know

38. Please share any additional comments about your trip in the Columbia Valley or suggestions on what the province of British Columbia could do to enhance your golfing experience?

39. Are you willing to participate in future Tourism British Columbia research? Participation may involve answering web-based surveys similar to this one. Your address information will be kept completely confidential and used only for research purposes.

- Yes
- No

Thank you for your help!

Please click **SUBMIT SURVEY** to be entered in a draw for a chance to win a vacation for two to Columbia Valley (Valued at \$2,500). The Grand prize includes two rounds of golf at each of the nine Columbia Valley Golf Courses, two nights accommodation at Radium Hot Springs Resort, two nights accommodation at Panorama Mountain Village, two nights at Fairmont Hot Springs Resort. The draw will be held in November 2008.

GOOD LUCK!

Appendix C - Response Bias Testing

Response Bias Testing

Methods

The study design produced two sets of data that are available for analysis – the interview and follow-up questionnaires. The respondents could differ because travellers could drop out of the study by not agreeing to complete the follow-up questionnaires or by not completing the follow-up questionnaire if they had agreed to complete it. Both instances could cause the follow-up questionnaire results to be unrepresentative of travellers interviewed (non-response bias).

A series of tests were conducted to assess the follow-up questionnaires' representativeness or, in other words, if the follow-up questionnaire results portray the actual population of travellers interviewed.

Representativeness was assessed by:

1. Comparing demographics, trip and traveller characteristics between those that agreed and did not agree to complete the follow-up questionnaire (Tables A3).
2. Comparing demographics, trip and traveller characteristics between those that responded and those that did not respond to the follow-up questionnaire (Tables A3).

Responses to similar questions in the interview and follow-up questionnaires could vary due to real differences in traveller behaviour (for example, a traveller may have perceived that an item may have had a different impact on their trip when they were interviewed compared to the responses on the follow-up questionnaire). Therefore a series of questions were asked in the same way on both the interview and follow-up questionnaire. Differences between responses to the two questionnaires were assessed by comparing responses to key questions that were asked in both the interview and on the follow-up questionnaire (Table A4).

Results

Differences in Respondents who Agreed or Did Not Agree to Follow-up

- At the Columbia Valley Golf Courses, there were no practical differences between respondents who agreed to participate with those who did not agree to participate in the mailback questionnaire.

Differences in Respondents that Returned/Did Not Return the Follow-up Questionnaire

- There was one difference between respondents who returned the follow-up questionnaire compared to those that did not. Those who returned the follow-up survey spent, on average, fewer days in the Columbia Valley region than did those who agreed to complete the survey but did not follow through.

Differences in Interview/Follow-up Responses

- Responses to the follow-up survey were generally consistent with those given during the interview at the Columbia Valley golf course.
- On average, follow-up respondents were travelling in smaller travel parties.
- They were also less likely to have a university degree.

Conclusions

- Overall, few differences existed between those who agreed to participate in the follow-up questionnaire and those who did not agree to participate in the follow-up questionnaire.
- Follow-up question responses are generally representative of the population that was interviewed.
- Most of the variables tested did not indicate practical difference between the follow-up questionnaire and interview results.

Table A3. A summary of the comparisons between those that agreed to the follow-up questionnaire and those that did not, those that did and did not respond to the follow-up questionnaire and between the interview and follow-up responses for the Columbia Valley.

Columbia Valley	✓ Indicates a Practical Difference		
	Agreed to Follow-up	Follow-up Responses (Non-Response Bias)	Interview/Follow-up Responses
Origin	N	N	n/a
Gender	N	N	N
Age	N	N	N
Party Size	N	N	✓
Parties With Children	N	N	N
Education	N	N	✓
Days Away from Home	N	N	N
Median	✓	N	N
Days in BC	N	N	N
Median	✓	✓	✓
Days in Columbia Valley	N	✓	n/a
Median	✓	N	n/a
Daily Expenditure ¹	N	N	N
Median	N	N	✓

1. Expenditure comparisons only include those that could answer the question in the interview. Those that started their trip on the day of the interview and those that did not answer the question were excluded. The top and bottom 2% of responses were trimmed.

Table A4. A summary of differences in data between the interview and follow-up questionnaire

Concept/Questions	Trip Characteristics Results		Practical Difference?
	Interview	Follow-up	
Mean Days Away From Home	8.66	9.19	N
<i>Median</i>	7.00	7.00	N
Mean Days In BC	8.04	8.34	N
<i>Median</i>	6.00	7.00	✓
Mean Daily Expenditure	\$423.23	\$414.19	N
<i>Median</i>	\$300.00	\$250.00	✓
Mean Party Size	4.72	3.86	✓
Age - Under 24 Years	2.6%	3.0%	N
Age - 25-34 Years	9.1%	8.0%	N
Age - 35-44 Years	20.1%	16.1%	N
Age - 45-54 Years	36.4%	40.2%	N
Age - 55-64 Years	25.4%	24.1%	N
Age - 65 Years or Older	6.5%	8.5%	N
Education - Less Than High School	0.3%	0.5%	N
Education - High School	12.1%	8.3%	N
Education - Some Technical, College or University	7.8%	12.4%	N
Education - College or Technical Diploma	22.9%	29.4%	N
Education - University Degree	45.2%	34.9%	✓
Education - Masters or a PhD Degree	11.8%	11.9%	N
Education - Other	0.0%	2.8%	N
Gender - Male	77.8%	69.0%	N
Gender - Female	22.2%	31.0%	N
Parties with Children	26.1%	23.6%	N

Appendix D - Reasons for Dissatisfaction with Overall Value of Golf Course

Overall, how satisfied or dissatisfied were you with the overall value at this golf resort?
Please explain why you were dissatisfied with the overall value at this gold resort.

- Cost is becoming excessive. After golf there was no room in restaurant so we had to go to Invermere for food and refreshments.
- Course was not in good condition and not worth the price we paid. However the location and tee times available best met the needs of the group. I would not personally pay that price as a recreational round.
- Far too expensive for quality of course.
- Feel the cost to golf is very high.
- Green fees too high. Great course but a round of golf at a Canadian golf course is just not worth that much.
- Highest price for 18 holes that we paid in the 5 rounds, the course was in poor condition, winter kill, re sodded areas, grass and weeds in the fairway sand traps, etc.
- I feel that due to the high cost of the green fees, there should be a discount (or other compensation) for days when the course conditions are so poor. The cart GPS was not fully working that day either. Other courses were in better shape and not as expensive.
- If it were not for the accommodation discount I would not have golfed there, course was in terrible condition compared to other course which with my villa discount was 20.00 cheaper. Price needs to reflect condition of course. Also, Marshalls did not do their job, for 90.00 I expect pace of play to be maintained, and not have problems with groups taking kids on the course and not raking traps/ fixing divots, it's terrible I can play cheaper courses and have simple things like that taken care of. Will not go out of my way to golf there again.
- Too expensive for what we played, very disorganized getting checked in at pro shop, didn't have enough carts ready and we had to wait and missed tee time. We were rushed on the course and the construction on the course interrupted play. I would likely NOT go back there.
- We all felt it was over priced for a short course. Other friends from AB that went at a different time had also expressed the same opinion.
- Year over year the price keeps going up but the course experience hasn't changed. The rate of play is a problem.

Appendix E – Comments from e-mail Follow-up Survey

Comments are grouped into the general categories of cost/value, multi-course packages, keep it quaint, more development, programs for children, better information dissemination/booking options, better transportation options, improved packaging, golf experience, other and positive comments.

Cost/Value

- Better prices at golf courses.
- Costs of groceries, fuel are higher.
- Enjoy the golf but are noticing that prices are increasing to point we will consider other areas.
- Great courses. Carts were cart path only.
- I get luck because the company I work for has a condo at big horn resort so we save a lot on accommodations. That being said the price of golf in Western Canada is becoming way too high. \$150.00 for a round of golf scares a lot of people from playing. I believe that a lot of people are robbed from the experience of playing these beautiful courses because of the price. All the courses play in the valley the only one that is priced economically is the courses. The only reason they are is that they don't keep it great shape like the others.
- Just keep the green fees fair and competitive.
- Keep it affordable.
- Keep the green fees reasonable and courses in good condition. A few more restaurants in Radium would be an asset.
- Re evaluate your green fees - Montana is much more value at this time. Develop golf packages between the courses.
- Remove provincial taxes.
- Still feel the golfing could be less expensive. The golf packages need to be set up different. Getting 2 nights and 3 rounds or 2 rounds with 1 night doesn't make sense when coming from far away. Doesn't take travel time into effect. Need to have an additional night accommodation to add value to it. Otherwise you have to golf same day as travel.
- We have got 30-32 guys together annually for several years. Most from Calgary and Prince George and Pine Falls Man. The cost and age of condos is a little worry some as there are many new resorts with indoor hot tubs etc. for the same price or even cheaper...staff is great though...

Multi-Course Packages

- Golf courses should get together and consider a cost incentive package.
- Golf packages for multiple courses custom made to price range.
- Great to golf--just a little expensive. Perhaps a golf package with options for several difference courses at a reduced rate.
- PACKAGES FOR A # courses to give green fee breaks.
- Packing courses together...with preferred tee times.

Keep it Quaint

- Very Nice Valley Hope it doesn't get over exploited.
- Excellent place to visit and golf - the challenge will be to keep it "quaint" and "relaxing" if development continues the way it is currently going.

More Development

- HARD TO IMPROVE - but possibly more development.
- We feel the Columbia Valley area is in need of more deluxe hotel accommodations. There seem to be lots of standard rooms available, but not enough deluxe accommodations. We rented a new condo in Radium and it was really nice but a hotel room would have been more suitable for a 3 night stay. We look forward to the new property at Copper Point.

Programs for Children

- Accommodate children activity.
- Kids programs while the parents' golf.

Better Information Dissemination/Booking Options

- Central On-line booking option for Golf Courses in the region.
- Golf BC website needs to have an easily searched domain name. Google and others divert to commercial, sponsored links and I would prefer to use Tourism BC's list of courses in a region to pick and choose for planning.
- Include information on green fees in promotional golf material, i.e. Golf in the Kootenays, etc.
- Love coming to BC. Suggest details of mountain adventures unique detailed pictures of potential adventures.
- More information online and easier booking online with no penalties for cancelling lots of good beer and possibly shuttles between courses and hotels decreasing traffic and alcohol on roads we are good
- More supplemental information when arriving to the destination, or at least making it more accessible
- Need better advertising in area for things to do.
- Start booking sooner you start too late in the year.
- The courses in general are spectacular and in excellent condition. Literature is not so easy to acquire. Web sites are useful.

Better Transportation Options

- Better Highways. Lower prices and taxes.
- HOURLY SHUTTLE BUSES TO AND FROM GOLF COURSES WILL CUT DOWN ON TRAFFIC AND FUEL.
- I really enjoyed the trip. We stayed in Panorama. The worst things were the travel between courses. Next time we will find a more central place. It didn't leave us time to do anything besides golf.
- If west jet flew to Invermere it would be nice it's a long drive from Edmonton.

Improved Packaging

- Definitely enjoy traveling to BC for some golf. Have had some great weather, courses and people have been friendly, helpful. Given the economic situation, I'll likely be checking out any special deals / promotions more carefully.
- I was particularly impressed with an offer which offered half price on a second round of golf (i.e. after the first 18 holes). That was very attractive and will bring me back to that particular course and others if they offered the same.
- More variety of 1 week packages.
- Travel/play golf packages.
- We have private accommodation when we stay in Radium - but it would be nice to be able to purchase a golf package with some deals on the local courses we want to golf.

Golf Experience

- Indoor golfing or driving range due to restricted weather.
- Monitor speed of play more consistently.
- Please upgrade the clubhouse and dining. This used to BE the place to play golf
- We were very disappointed with the condition of the course during our stay. Very expensive when considering the condition of the greens at that time.
- Tax those (_____) there are too many of them the line ups are huge. With all of them moving to the valley property value has increased and is forcing the locals out. There should be a more sustainable way to manage these (_____).
- We will for sure return to the Columbia valley for golf.

Other

- Access to water (lakes) is difficult for visitors. Clear algae growth in busy beach areas.
- ONLY ISSUE WITH WINDERMERE VALLEY IS THE LOCATION OF THE LOCAL DUMP.
- This is a group trip that we have taken for over 10 years. It is always enjoyable and we are always treated well. The local population and businesses continue to treat us the way they do we will keep coming back.
- Too much pressure to get into time shares, lighten up.

Positive Commentary

- Actually, a very enjoyable trip. Looking forward to coming back soon, as time and funds allow.
- Always a great experience, usually great weather.
- Always good.
- Columbia Valley offers everything we love to do, we go there often.
- Give me enough time on earth to get to all of them.
- Great fun, no immediate negatives....
- It is a great place to visit and golf. It impressed me so much that I invested in some property.
- It was a great experience.
- My family lives in B.C. so the Columbia Valley is a good meeting destination for us.
- My Wife and I had a great trip and really enjoyed ourselves, we will be back in the very near future
- This is truly the most amazing place to golf in the Rockies. We have also been to South Carolina - but prefer the mountains.
- This year's trip was a service award from my employer. I golfed the Springs, Eagle Ranch, Copper Point and Greywolf the previous year, and loved every minute of it!
- Trip was excellent. Condo was great.
- We aim to visit the Columbia Valley from Australia at least once every two years. We have family who live in Invermere and the area is such a nice place to visit.
- We had a very good time. The Golfing was great & the food, we do this twice a year, at Radium
- We had an absolutely wonderful time and would definitely do it again.
- We have a time share at Fairmont and will visit there almost every year.
- We have a time share at riverside so go every year.
- We have been going to Fairmont now for 18 years; we have always enjoyed our holidays there. There have ample changes over the years and I would say most are positive.
- We love going to BC.
- We love visiting the Columbia Valley.
- We own a timeshare at Hillside which makes it very convenient to come to the Valley. I returned a few months later with a group of 8 men for a 7 round golf trip in the Valley and in the Banff area. We had a blast.
- We own quarter shares of condo units at both Radium and at Fernie. Radium is better for golf, Fernie is better for skiing.
- We own timeshare at Fairmont...our choices are June or Sept/Oct so the weather can be beautiful or not...that is the only downside but nothing you can do about it!!
- We will happily return to the valley as we have a timeshare there which we like to use THERE, rather than trade for somewhere else.
- We will semi retire in the Columbia Valley if we get the opportunity. It is a relaxing place to stay and visit.

Appendix F – Positive Images of the Columbia Valley as a Vacation Destination

Comments are grouped into the general categories of accessibility, accommodation, affordable, beautiful/scenic, golf, weather, hospitality/friendly, customer service, clean, food, uncrowded, relaxed, wildlife/wilderness, mountains, lakes, lots to do, family, facilities, location, attractions, nature, safety, and other.

What positive images come to mind when you think of the Columbia Valley as a vacation destination?

Accessibility:

- 3 hrs from Calgary.
- Accessible (2).
- Close (2).
- Close by (2).
- Close by to Calgary.
- Close destinations.
- Close to Edmonton.
- Close to home (4).
- Close to nature.
- Distance.
- Distance from Calgary.
- Distance to travel.
- Easy access.
- Easy access / drive.
- Easy to get around.
- Easy to reach.
- Generally easy access.
- Good accommodations.
- Good accommodation (2).
- Good accommodations.
- Good lodging.
- Highways.
- Not too far.
- Proximity (5).
- Proximity to Calgary.
- Proximity to home,
- Short drive from Calgary.
- Under 3 hrs away.
- Within 1 day drive.

Accommodation:

- Accommodation (3).
- Accommodations (4).
- Accommodating.
- Better hotel choices.
- Camping.
- Camping nearby.
- Four seasons.
- Lodging.

Affordable:

- Affordability.
- Affordable (2).
- Good value (2).
- Inexpensive.
- Lodging price.
- Price (2).
- Prices seemed reasonable.
- Reasonable prices (2).
- Value (2).

Beautiful/Scenic:

- Atmosphere views.
- Awesome scenery.
- Beautiful (9).
- Beautiful area (2).
- Beautiful BC.
- Beautiful country side.
- Beautiful courses.
- Beautiful environment.
- Beautiful scenery (6).
- Beautiful surroundings.
- Beautiful views.
- Beauty (6).
- Breathtaking.
- Fantastic scenery.
- Gorgeous landscape.
- Gorgeous scenery (2).
- Great scenery (4).
- Lovely sights.
- Magnificent views.
- Majestic (2).
- Mountain scenery.
- Natural beauty (6).
- Physical beauty.
- Picturesque (2).
- Pretty.
- Pretty scenery (2).
- Scenery (49).
- Scenic (12).
- Scenic, weather.
- Spectacular scenery.
- Surroundings.
- The surroundings were remarkable, the freedom and space made the trip very relaxing and enjoyable.
- View (2).
- Views.
- Wonderful scenery.

Golf:

- # of golf courses.
- Beautiful golf courses (3).
- Challenging golf.
- Different level of golf courses.
- Excellent courses.
- Excellent golf (3).
- Fantastic golf experience.
- Golf (33).
- Golf course.
- Golf courses (12).
- Golf course choices.
- Golf course quality.
- Golf courses in the area.
- Golf courses were not busy.
- Golf experience is great because courses put regard to customer relations.
- Golf options.
- Golf prices reasonable.
- Golfing (9).
- Golfing choices.
- Good golf (5).
- Good golf courses (3).
- Good golfing (2).
- Good quality courses.
- Great course.
- Great golf (12).
- Great golf courses (7).
- Great golfing (5).
- Great golfing, lots of choices.
- Great variety of golf courses.
- Lots of golf.
- Lots of golf courses (3).
- Lots of golfing to choose from.
- Love the golf.
- Lush golf course.
- Manicured golf courses.
- Many golf choices (3).
- Mountain golfing.
- Nice golf courses (2).
- Number of courses.
- Number of golf courses.
- Open course.
- Quality golf.
- Quality golf courses.
- Quality of courses.
- Quality of golf (2).
- Scenic courses.
- The courses are very well maintained.

- Variety of courses.
- Variety of golf.
- Variety of golf courses.
- Very good location of golf courses.
- World class golf.

Weather:

- Beautiful weather.
- Clear nights.
- Climate (6).
- Conditions.
- Excellent conditions.
- Good weather and people.
- Good weather (9).
- Great weather (2).
- Great weather (we were lucky).
- Heat.
- Hot.
- Nice weather (3).
- Sun.
- Sunny weather.
- Typically good weather.
- Unreal weather.
- Usually good weather.
- Usually great weather.
- Warm.
- Warm days.
- Warm temperatures.
- Warmer temperatures.
- Warmth.
- Weather (37).
- Weather is usually good.

Hospitality/Friendly:

- Felt welcome everywhere.
- Friendly residents.
- Friendliness (3).
- Friendliness of people.
- Friendly (10)
- Friendly people (5).
- Friendly service.
- Friendly staff.
- Friendly, helpful people.
- Helpful.
- Hospitality (2).
- Nice people.
- Nice small town atmosphere.
- People (5).

- People are friendly.
- Welcoming.

Customer Service:

- Courses interested in repeat business -- good service.
- Customer service.
- Customer service was great.
- Excellent customer service while golfing.
- Excellent service.
- Great customer service.
- Nice staff.
- Pride in businesses.
- Very courteous staff at golf course.

Clean:

- Clean (3).
- Clean air and the best outdoors anywhere.
- Clean feel to it.
- Cleanliness.
- Fresh air.

Food:

- Dining experiences.
- Food (4).
- Food generally OK.
- Good food (2).
- Great food.
- Great dining in unique establishments.
- Some good dining.

Uncrowded:

- Few people & cars.
- Lack of crowds.
- Low population.
- Not too crowded.
- Not crowded.

Relaxed:

- A complete escape.
- Get away.
- Peaceful (2).
- Peacefulness.
- Quiet (2).
- Quiet and peaceful.
- R and R.
- Relaxation (3).

- Relaxed.
- Relaxed atmosphere (3).
- Relaxed pace.
- Relaxing (12).
- Relaxing vacation.
- Serenity.

Wildlife/Wilderness:

- Wildlife (5).
- Wilderness.
- Wilderness adventure.

Mountains:

- Mountainous.
- Mountains (13).
- Mountains and valleys.
- Mountains lakes.

Lakes:

- Beach & lake.
- Lake (6)
- Lake - boating.
- Lake Windermere.
- Lake/water access.
- Lakes.
- Rivers.

Lots to do:

- Choices.
- Lots of hiking.
- Lots of places to enjoy.
- Lots of recreation ideas.
- Lots to do (3).
- Lots to do on vacation.
- Outdoor activities.
- Plenty to do.
- Selection.
- Some special events.
- Swimming.
- Things to do.
- Varied activities.
- Variety.
- Variety of activities.
- Variety of choice.
- Variety of things to do (2).
- White water rafting.
- Wide variety of activities.

Family:

- Family (4).
- Family oriented (2).
- Family tradition.
- Great for kids.
- Great for kids, lots of activities.

Facilities:

- All the conveniences.
- Amenities.
- Facilities (2).
- Good amenities.
- Good quality facilities.
- Good restaurants.
- Nice restaurants.
- Recreation.
- Recreation facilities.
- Restaurants.
- Variety of facilities.
- Variety of restaurants.

Location:

- Location (5).
- Location/Beautiful.
- Locations.

Attractions:

- Attractions.
- Fun at the hot springs.
- Hot pools.
- Hot springs.
- Local.
- Local attractions.
- Other attractions.
- Radium Hot Springs.

Nature:

- Atmosphere.
- Great atmosphere.
- Green.
- Green, lush.
- Natural.
- Nature (3)
- Quaint feel of valley.
- Trees.
- Trees/vegetation.

Safety:

- Safe (2).

Other:

- Awesome.
- Childhood memories.
- Easy.
- Fresh air.
- Fun (2)
- Good (2).
- Long season.
- Nice resort.
- Nice small towns.
- Nice.
- Quality.
- Utilize timeshare.
- Very good.
- We have timeshare there.

Appendix G - Negative Images of the Columbia Valley as a Vacation Destination

Comments are grouped into the general categories of cost, PST, weather, crowding/busy, distance, traffic, roads, over-development, golf experience, limited amenities/facilities/services, food quality/selection, lack of night life/limited operating hours, new development/environmental quality, cleanliness, poor customer service, none, wildlife/insects and other.

What negative images come to mind when you think of the Columbia Valley as a vacation destination?

Cost:

- A little expensive.
- A little pricey.
- Accommodation cost.
- Becoming expensive.
- Can be expensive.
- Cost (7).
- Cost of food too high.
- Cost of gas.
- Cost of golf (7).
- Cost of meals.
- Cost of same.
- Cost of things.
- Cost to golf.
- Costly.
- Costly activities/ low value for money.
- Costs (2).
- Costs getting high.
- Expense.
- Expensive (10).
- Expensive air flight.
- Expensive entertainment.
- Expensive food.
- Expensive fuel.
- Expensive golf (4).
- Expensive golfing (1).
- Expensive recreation, food and gas.
- Expensive restaurants.
- Fuel prices (2).
- Gas costs (2).
- Gas price.
- Gas prices (3).
- Gas prices too high.
- Gas too expensive (2).
- Gasoline expensive.
- Getting expensive.
- Getting more expensive.
- Getting more expensive to make the trip from Edmonton.
- Getting overpriced.
- Golf can be a bit pricey.
- Golf courses are expensive.
- Golf courses are very expensive.
- Golf expensive.
- Golf fees (2).
- Golf is expensive (3).
- Golf ---pricey.
- Golf too expensive.

- Golf very expensive.
- A course is over priced, and my last visit was the last.
- High cost of golf.
- High price.
- Little range of price.
- No discounts for family's.
- No price reduction for out of province visitors.
- Other courses within 1 hour drive are cheaper.
- Price (5).
- Price of gas.
- Price of gasoline.
- Price of golfing.
- Prices (2).
- Prices - example gas carbon tax.
- Prices higher than where we live.
- Pricey.
- Rising costs.
- Rising costs for a family.
- Some are very pricey.
- Starting to get too expensive.
- Too expensive.

PST:

- Provincial Sales Tax (3).
- PST (3).
- PST tax.
- Taxes (2).
- Taxes!

Weather:

- Bad weather (2).
- Climate.
- Rain (2).
- Too hot.
- Unexpected weather.
- Weather (5).
- Weather - cold/rain.
- Weather at times.
- Weather in June can be iffy!
- Weather quite hot.
- Weather unpredictable.
- Weather unreliable.
- Windy.

Crowding/Busy:

- Busy (5).
- Can be congested.
- Crowded (3).
- Crowds (2).
- Getting crowded.
- Getting overpopulated.
- Lake is busy.
- Lake too busy on weekends.
- Lots of people (2).
- Other tourists.
- Parking.
- People.
- Scarce goods.
- Slow.
- Some things are getting run down.
- Starting to get too busy.
- Too busy (2).
- Too crowded.
- Too crowded - at times.

Distance:

- Distance (4).
- Distance for a short stay.
- Distance from home.
- Drive there.
- Driving.
- Far from home.
- Length of travel to get there.
- Locations.
- Long distance to get to the valley.
- Long drive.
- Lot of driving time.
- Nothing - too far to visit more often.
- Sometimes too close for extended trip.
- Transportation, it seemed tough to get around at times. Had to drive many different places to experience various environments and attractions.
- Travel distance.
- Travel from Ontario.
- Travel time.
- Travel time to get there.
- Travel to different courses.
- Trip from Calgary can be long depending on traffic.

Traffic:

- Busy roads.
- Highway traffic (2).
- Lots of traffic.
- Roads are busy.
- Single lane highway (2).
- Single lane highway very busy.
- Single lane highways.
- Slow traffic.
- Too many boats.
- Traffic (7).
- Traffic between Radium & Fairmont.

Roads:

- Bad roads.
- Dangerous roads.
- Highways.
- Narrow roads.
- Road signage.
- Road to Panorama/Grey Wolf.
- Roads (4).

Over-development:

- Construction everywhere.
- Development.
- Not a problem yet but try to keep the dining chains out. Banff for example has had its uniqueness ruined by the take over of eating establishments by the chains. Keep yourselves unique.
- On the verge of over development.
- Over-development in some areas.
- Over-development.
- Some areas rundown.
- Starting to get too commercialized.
- Tacky attractions.
- Too many people pushing vacation time shares.
- Too much development.

Golf Experience:

- Available times.
- Better directions and time.
- Booked.
- Booking can be complicated.
- Booking limitations.
- Golf games exceed 4 hours.
- Golfing.

- Have to book far in advance to get tee times.
- Hours of operation.
- Not enough time.
- Not getting tee times.
- Slow play at golf course.
- Sometimes crowded and can't get on courses.
- Tee times harder to get.
- Tough to get tee times.
- Very busy golf courses.

Limited Amenities/Facilities/Services:

- Accommodation quality.
- Lack of quality shopping.
- Lack of services.
- Lack of sewer.
- Limited campsites that are not seasonal.
- Limited choice of hotels.
- Limited shopping.
- Need more campgrounds.
- No air travel.
- No natural gas.
- No rental cars in radium.
- Not enough variety.
- Poor grocery services.
- Poor recycling.
- Poor water in lake.
- Services (2).
- Shopping.

Food Quality/Selection:

- Difficult to access good food restaurants and grocery stores.
- Fine dining.
- Finer restaurants.
- Food (4).
- Food in Fairmont.
- Food services.
- Food/dinning.
- Lack of good restaurants.
- Limited choice of restaurants.
- Limited quality restaurants.
- Limited restaurants in Radium.
- Need more dining choices.
- No good restaurants.
- No high end restaurants or night attractions.

- Not enough restaurants.
- Restaurants.
- Restaurants i.e., Limited and quality.
- Slow restaurant service.

Lack of Night Life/Limited Operating Hours:

- Farmers market needs to go into the fall.
- Lack of family entertainment in the evenings.
- Lack of night life.
- Limited night life.
- Need earlier children's activities before 11 am.
- Nightlife (2).
- No shops and restaurants open late.

New Development/Environmental Quality:

- Area planning.
- Lake Windermere needs more environmental protection.
- New developments not environmentally friendly.
- Red (sick-looking) trees.

Cleanliness:

- Cleanliness.
- Gravel pits.
- Junky Sites along Highway between Radium and Fairmont.
- No notice of poor conditions.
- Unkept privately owned highway frontage.

Poor Customer Service:

- hotel disappointing.
- Hotsprings a little disappointing.
- Terrible grocery stores.
- The clubhouse.

None:

- None (5).
- Nothing specific.

Wildlife/Insects:

- Insects.
- Wildlife.

Other:

- Camping Fairmont.
- Can't go often enough.
- Cities are older.
- Forest fires.
- Leaving at the end.
- Less abundance of info about other attractions.

Appendix H - Unique Images of the British Columbia as a Golf Destination

Comments are grouped into the general categories of wildlife, weather, scenery, close to Alberta, golf course variety, mountain golf, cost/value, proximity/accessibility, extended season, lakes, golf course staff/services, family/friends, friendly people, Canadian, accommodation, lots to do, uncrowded/authentic, relaxing and other.

What are the unique characteristics of British Columbia as a Golf Destination?

Wildlife:

- Lots of wildlife.
- Wildlife (8).
- Wildlife encountered.
- Wildlife on the course.

Weather:

- Better weather.
- Climate (2).
- Climates.
- Combination weather, courses, scenery.
- Dependable weather.
- Excellent weather.
- Good climate.
- Good golf weather.
- Good weather (4).
- Gorgeous weather.
- Great weather (4).
- Hot and dry weather.
- Nice weather.
- Reasonably good weather.
- Sun stays out late.
- The weather.
- Usually good weather (3).
- Valley weather.
- Variety of weather.
- Warm weather.
- Weather (37).
- Weather - not too hot not too cold.
- Weather conditions.
- Weather is good.
- Weather is typically good.
- Weather is usually great.
- Weather-longer season.

Scenery:

- Area.
- Beautiful scenery.
- Beautiful (3).
- Beautiful course.
- Beautiful courses.
- Beautiful locations.
- Beautiful mountain backdrop.
- Beautiful scenery (4).
- Beautiful scenery and wildlife.
- Beautiful settings (2).

- Beauty (5).
- Beauty of golf courses.
- Beauty-sights-unique.
- Breathtaking scenery.
- Fabulous scenery.
- Gorgeous valley.
- Great scenery (2).
- Landscape (2).
- Landscaping and beauty.
- Majestic scenery.
- Mountains.
- Mountain scenery (5).
- Mountain View.
- Mountain views (3).
- Mountains (22).
- Natural beauty.
- Natural beauty is fantastic.
- Nature (2).
- Nice scenery.
- Picturesque.
- Scenery (n=52).
- Scenery and course locations.
- Scenery and location.
- Scenery and wildlife.
- Scenery is awesome.
- Scenic (5).
- Scenic mountains.
- Surrounding beauty.
- Terrific mountain views.
- The scenery.
- The valley is absolutely gorgeous.
- The view.
- Topography (2).
- Varied scenery.
- Very scenic (3).
- View (2).
- Views (4).
- Views while on course.

Close to Alberta:

- Accessible from Alberta.
- Close proximity to our home in Alberta.
- Close to Calgary (9).
- Close to home (Calgary).
- Closer to Edmonton.
- Driving time from Edmonton.
- Proximity to Alberta (2).
- Proximity to Calgary (2).

Golf Course Variety:

- # of courses (2).
- # of excellent courses.
- Able to stay in one area with access to several golf courses.
- All courses in good condition.
- All level of courses.
- Availability.
- Care of course.
- Challenge.
- Challenging.
- Choice.
- Choice of courses (2).
- Choices (4).
- Concentration.
- Condition (2).
- Condition of courses (5).
- Conditioning.
- Conditions.
- Conditions of courses (2).
- Course.
- Course condition (4).
- Course conditions (2)
- Course quality.
- Course reputations.
- Course services.
- Courses are unique.
- Courses in great shape.
- Density of golf courses.
- Difference in courses.
- Different layouts.
- Different styles of courses.
- Different types of courses.
- Diverse settings.
- Diversity of terrain.
- Each course is unique.
- Facilities (2).
- Golf.
- Golf courses are in good shape.

- Golf courses available for all level of golfer.
- Golfing in the mountains.
- Good courses.
- Good golf courses.
- Good quality.
- Great course layout.
- Great courses & weather.
- Great golf.
- Great golf courses.
- Great golfing at a reasonable price.
- Interesting golf courses.
- Isolation on courses.
- Large number of quality courses.
- Location (6).
- Location, good weather.
- Lots of choices (5).
- Lots of courses in great shape.
- Lots of good courses.
- Lots of golf courses.
- Lots of golf courses to choose from.
- Lots of selection.
- Lots of variety.
- Many choices (2).
- Many choices close together.
- Many courses close together.
- Many great courses to choose from.
- Many top courses.
- Nice courses.
- Number of courses (5)
- Number of courses easily accessible.
- Number of golf courses (6).
- Number of great courses in the vicinity.
- Numerous courses.
- Numerous great courses in close proximity.
- Plentiful courses.
- Plenty of choice in a central area.
- Quality (6).
- Quality courses (2).
- Quality of courses (4).
- Quality tracks.
- Several courses in relatively small area.
- So many courses within 30 minutes.
- The quality of the resorts.
- Top courses.
- Tough.
- Toughness.
- Varied courses.
- Varied types of courses.

- Variety (10).
- Variety of courses (5).
- Variety of golf.
- Variety of golf courses.
- Variety of terrain.
- Very good conditions.
- Well maintained.
- Wide variety of golf courses.

Mountain Golf:

- Being in the mountains.
- Elevated tee boxes and greens.
- Elevation changes.
- Enhance golfing with beauty nature.
- Excellent courses with regional distinctions.
- Landscape of courses.
- Mountain courses (3).
- Mountain golf.
- Mountain golf courses (2).
- Mountain golfing.
- Mountain setting.
- Mountain terrain.
- Mountainous background.
- Mountains (not city golfing.)
- Mountains/course terrain.
- Playing in the mountains.
- Range of courses. Mountain/valley.
- Rolling holes.
- Scenic golf courses (2).
- Something different.
- Surroundings (mountain golfing).
- Terrain (3).
- Terrain of courses.
- The mountain setting.

Cost/Value:

- Affordable.
- Canadian dollar.
- Cheaper.
- Choice of price.
- Cost.
- Expense.
- Good packages.
- Good value (2).
- Good value for your money.
- Great \$ value.
- Great value.
- Kids golf free week.

- Mostly good price for the money.
- Price (2).
- Reasonable cost (2).
- Reasonably priced.
- Value.

Proximity/Accessibility:

- 3 hr drive.
- Accessibility (2).
- Accessibility to accommodation.
- Accessible golf.
- Close (3).
- Close proximity (2).
- Close proximity to all amenities.
- Close to friends/ family who golf.
- Close to home (5).
- Close to our timeshare.
- Convenient to home.
- Destination.
- Drivable.
- Ease of accessing these courses.
- Easy access (2).
- Easy to get to.
- Good roads.
- Good tracks.
- Nearby.
- Proximity to home.
- Proximity (4).
- Proximity to home (2).
- Short travel.
- Travel distance.

Extended Season:

- Conditions in Alberta winter.
- Early season play.
- Extended season (2).
- Late tee off times.
- Length of season (2).
- Long golf season.
- Long golfing season.
- Long season.
- Longer season (2).
- Open / later than in Alberta.

Lakes:

- Blue water/lakes.
- Columbia River.
- Hot springs.

- Lake.
- Lakes.
- Lakes and rivers.
- Water/lakes.
- Windermere Lake.

Golf Course Staff/Services:

- Courteous staff.
- Customer service.
- Friendly staff.
- GPS golf carts.
- Great course architects.
- Green.
- Green, lush.
- Greens.
- High customer service.
- People (mel).
- Pro shop personnel.
- Staff.

Family/Friends:

- Family.
- Family activity.
- Friends to visit.

Friendly People:

- Friendliness.
- Friendly.
- Friendly people.
- Friendliness.
- Great people.
- Meet friendly people.

Canadian:

- Canadian (2).
- Canadian destination.

Accommodation:

- Accommodation.
- Home away from home.
- Rent friend's condo so accommodation is easy.
- RV parks.
- We have 2nd home there.
- We have a condo on the springs.

Lots to do:

- Diverse activities.
- Diversity.
- Lots of things to do if you do not golf.
- The amount of activities is varied.
- Varied experiences.

Uncrowned/Authentic:

- Less people.
- Natural feel.
- Not overly "touristy".
- Still doesn't have cookie cutter chains --still a unique place to visit.
- Uncrowded.

Relaxing:

- Relaxed atmosphere (2).
- Relaxing environment.

Other:

- Degree.
- Don't know.
- Enjoyment.
- Familiarity.
- Flowers.
- Fruit.
- Good food.
- There are none.