

# Phase 1 South Kootenay Regional Tourism Management Plan Literature Review and Content Analysis Summary

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## Executive Summary

The South Kootenay region is comprised of the individual communities of Trail, Rossland, Warfield, Fruitvale, Montrose and Electoral Areas A and B. This region currently does not have a collaborative plan to develop or manage tourism. A literature review and content analysis of relevant regional documents was completed to address the following questions:

1. What is the existing tourism environment in this region?
2. Are there any issues that are currently limiting the region's tourism potential?
3. What are the current visitor markets and their perception of the region?
4. What are the region's opportunities, competitive advantages, and lead projects?
5. What are the current and past marketing approaches?
6. Has there been any return of investment, or indication of success of tourism initiatives?

The following report summarizes the results.

## Key Findings

### TOURISM ENVIRONMENT

- The tourism environment includes current tourism management approaches and issues that are currently limiting the potential of tourism
- The existing tourism environments in the region, apart from Rossland, is non-existent or exists on a small scale that is limited by a lack of support and regional collaboration.
- The area is geographically isolated with limited air access, which leaves most tourists visiting by vehicle. Driving visitors often experience gaps in infrastructure, services, and amenities to support travel quality (e.g., rest stops with washrooms, interpretative signage, event information, and lookouts).

### VISITOR MARKETS

- Top visitor markets include Canadian residents – mostly from British Columbia, Alberta, and Saskatchewan.
- Other tourist markets include Europe – particularly Germany and the United Kingdom – and the United States of America.
- The South Kootenays are well known for drawing visitors who want to experience the “Kootenay Vibe”. The Kootenay vibe can be described as the laid-back nature of the many small communities, and the counterculture acceptance that keeps visitors returning.
- Tourists look forward to what is described as the vast offerings of outdoor activities, access to nature, and accessible backcountry.

- Rossland is well-developed as a four-season destination known for Red Mountain, and world-class skiing and snowboarding opportunities.
- The most common projected traveler type were the authentic experiencers - visitors who are passionate about exploring nature, history, and culture, on the path to personal development. This was followed closely by gentle explorers – visitors who enjoy the security of familiar surroundings, appreciate convenience, relaxation and typically look for all the comforts of home.

## **OPPORTUNITIES**

- The South Kootenay communities all shared a common theme of looking to re-brand and support/enhance the development of their downtown cores.
- The individual plans prioritized growing the presence of art, culture, heritage and creating/expanding park and recreation services.
- Developing winter and summer experiences could increase the visitor volume in non-peak seasons.
- Communities want to develop gateway entrances and create a sense of arrival to visitors and residents.
- All the individual plans have recognized the necessity of collaborating with the neighbouring communities.
- To succeed in a tourism market, the South Kootenays could benefit from being marketed as a packaged experience – as the communities offer something for every type of traveler.
- Visitors lack an easy way to gain awareness of all the area experiences and often must research multiple sites, brochures, and guides for this information. The communities have expressed interest in regional collaboration from enhancing the local trail system to creating a one-stop resource for marketing efforts (e.g., a regional website with a collaborative event calendar).

## **MARKETING**

- Marketing has shifted towards maintaining an online presence through social media, third party platforms, and community websites, all which have proven to be helpful.
- Research suggests using print marketing (e.g., pamphlets, information brochures and visitor guides) at all key visitor entrance gateways such as visitor centres and airports. This is something the communities are already doing or have shown interest in doing.

# Phase 1 South Kootenay Regional Tourism Management Plan: Survey Summary

Erin Head, Tracey Harvey, Sarah-Patricia Breen  
April 25, 2023

## Executive Summary

The Trail and District Chamber of Commerce (TDCOC) is embarking on a 3-phase project to generate a strategy for how to advance tourism, through an economic development lens, in the South Kootenay region. The first phase involved an assessment to analyze existing tourism products and experiences. TDCOC completed this assessment via a survey, created to address the following questions:

- What is the business knowledge of tourism value in the region?
- What are the potential benefits of tourism for regional businesses?
- What is the range of experiences and products in the region?
- Who are the target audiences?
- What needs and opportunities are identified by regional businesses?

The following summarizes the results, which were analyzed by Selkirk Innovates.

## Key Findings

### BACKGROUND

- Approximately 111 businesses featured in the #ThinkLocalFirst campaign brochure from the South Kootenay region comprised of Rossland, Warfield, Trail, Montrose, Fruitvale, and Area A and B of the Regional District Kootenay Boundary, were targeted for the survey.
- Responses were provided independently online and via in-person visits.
- There were 60 respondents:
  - 40 respondents completed the survey independently.
    - However, 12 of these respondents started the survey, but skipped all questions and were not included in the totals.
  - 20 responses were manually entered based on in-person visits.
- Businesses from all five municipalities responded, however, the majority of respondents were from business in Trail and Rossland.

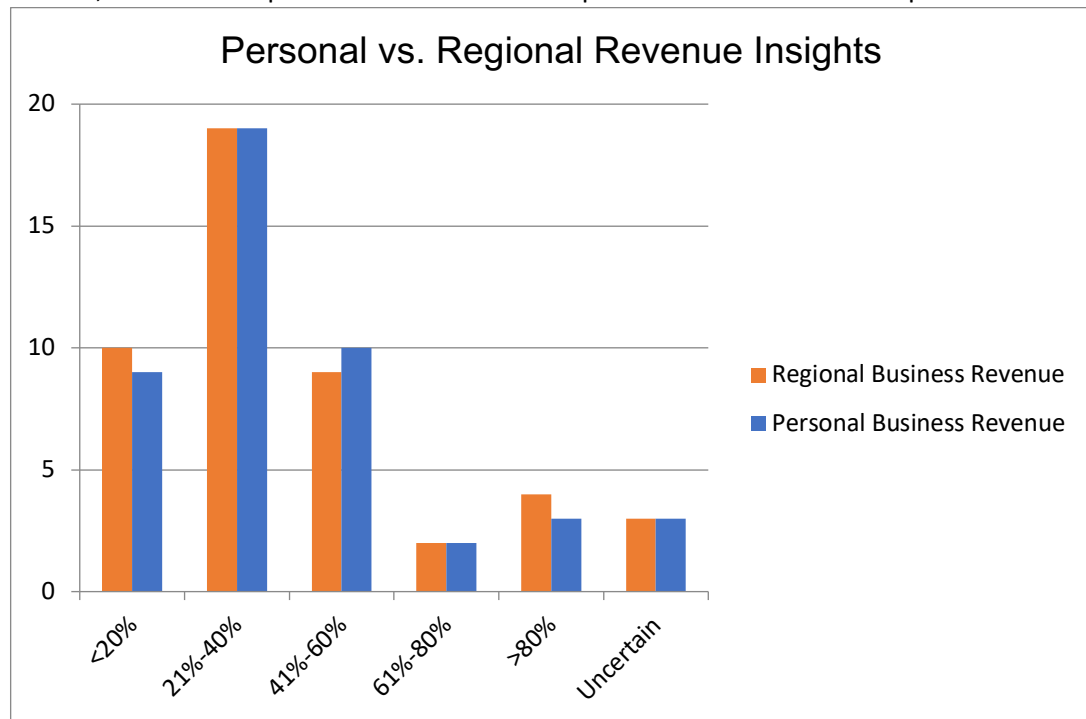
### VISITOR SERVICES AND VISITOR TYPES

- To better understand the experiences available, and the existing market, respondents were asked questions about the types of services and products they provide, as well as the types of visitors that frequent their businesses.
- The majority of responding businesses provided both services and products.
- Retail was indicated as the top category, followed by food and beverage, and adventure tourism and recreation.

- Top visitor types<sup>1</sup> were identified as:
  - Gentle Explorers who enjoy the security of familiar surroundings, appreciate convenience, relaxation and typically look for all the comforts of home.
  - Cultural Explorers who are active travelers that enjoy frequent weekend escapes focused on nature, local culture, and history.
  - Free Spirits who are thrill-seeking, need for the exciting and the exotic.
- Understanding visitor types is critical to the success of a tourism plan, as it supports targeted marketing and promotion, strategic development, maximizing economic impact, collaboration, and partnerships.

### REVENUE INSIGHTS

- To better understand business experiences and perceptions related to the economic impact of visitors, respondents were asked to estimate revenue from visitors for both their business and the region.
- Most respondents indicated that 21%-40% of their business revenue and regional revenue comes from visitors.
- This indicates potential opportunity for increased revenue from visitors.
- There is indication that respondents consider their businesses representative of a regional business, as 34% of respondents answered both questions with the same response.



### CHALLENGES

- Respondents were asked an open-ended question about challenges related to visitors.
- Responses were grouped by similar topic area and summarized.

<sup>1</sup> Visitor types are derived from Explorer Quotient, a way to segment and describe visitors  
<https://www.destinationcanada.com/en/tools>

- Marketing was indicated as the largest challenge, specifically:
  - Not promoting the area as a complete package.
  - Not promoting the region by a local tourism marketing organization.
  - Encouraging visitors to the area.
- Transportation was the second largest challenge, specifically:
  - The winter roads, lack of accessible transportation to the area, and lack of accessible transportation within the area.
- Other challenges included:
  - Demands of visitors not being met.
  - Climate change and how it may affect the region.
  - Limited business hours.
  - A lack of collaboration amongst businesses, organizations, and local governments.

#### **OPPORTUNITIES**

- Like challenges, respondents were again asked an open-ended question, but this time about opportunities related to visitors.
- Responses were grouped by similar topic area and summarized.
- Increasing the number of visitors was indicated as the largest opportunity, and specifically:
  - An increase in US visitors.
  - Encouraging residents from the Nelson area to visit.
  - Encouraging a broader range of visitors for events.
- Offering unique “Kootenay-niche” products and marketing was indicated as the second largest opportunity, and specifically:
  - Offering unique souvenirs.
  - Regional promotions.
  - Using market research to change and adjust as based on the needs and wants of visitors.
- Other opportunities included:
  - Collaboration (i.e., the creation of a destination marketing organization).
  - Business Expansion.
  - Special events.
  - Additional revenue (i.e., from tourism tax).

**For more detail about the project, please contact Erika Krest at [executivedirector@trailchamber.bc.ca](mailto:executivedirector@trailchamber.bc.ca)**

# Phase 1 South Kootenay Regional Tourism Management Plan: Focus Group Summary

Erin Head, Tracey Harvey, Sarah-Patricia Breen  
April 25, 2023

## Executive Summary

The Trail and District Chamber of Commerce (TDCOC) is embarking on a 3-phase project to generate a strategy for how to advance tourism in the South Kootenay region, through an Economic Development lens. The first phase engaged two small yet diverse focus groups of business and municipal leaders from various backgrounds, to identify options and provide insight for strategy development. The purpose of these focus groups was to discuss the following questions:

- Thinking about regional strengths and opportunities, what actions should a regional tourism plan include that could support or enable these?
- Thinking about regional weaknesses and threats, what actions should a regional tourism plan include that could reduce, mitigate, or address these?
- What are the available pathways or funding models to support this ongoing work?

The following summarizes the results, which were produced by Selkirk Innovates.

## Key Findings

### STRENGTHS AND OPPORTUNITIES

**Context:** The question focused on identifying strategies to promote tourism that are tailored to the unique characteristics and advantages of the region.

- Regional collaboration was identified, by both groups, as a priority.
- Regional collaboration included:
  - Continued communication with residents, local governments, community supporting organizations, and businesses.
  - Connecting the community through regional representation.
  - The creation of a Destination Marketing Organization (DMO).
  - Special events with regional representation.
- Group A also identified the following overarching topics:
  - A need for “demographic change” to target repeat and shoulder season visitors and longer stays. This may also help to increase the availability of skilled labor in the industry.
  - Marketing regional assets and promoting the area as a unique destination.
  - Leveraging events to increase community participation and to provide more reasons for visitors to travel to the region (Note, Group B also identified events, but with less emphasis).
- Group B also identified the following overarching topics:

- Coordination for planned business growth (vs unplanned growth), a population increase, and the creation of a sustainable regional environment. Related projects include improving Official Community Plans (OCPs) and increasing available accommodation.
- Branding, that requires selecting a regional name to capture the extent and character of the region.
- Infrastructure, that requires a “diagnostic identification” of existing infrastructure to understand regional assets and needs. This process may highlight the need for various infrastructure projects like developing a Violin Lake Park, a marina campground, and building more housing.
- Transportation improvements that would increase accessibility to and from the airport and within towns to help increase the number of visitors to the region.

### **WEAKNESSES AND THREATS**

**Context:** The question focused on actions that mitigate or address weaknesses and threats to the region. These actions should improve the quality of the tourism experience and increase the competitiveness of the region.

- Both groups acknowledged tourism must be developed thoughtfully to maintain the regional quality of life, preserve place, and be mindful of affordability. This approach will help create buy-in, and a cohesive regional environment that considers long term impacts.
- Marketing was also highlighted by both groups; positive advertising can be used to brand the region and increase communication between the region and visitors.
- Group A also identified the following overarching topics:
  - Using multiple means of communication (i.e., round table discussions and social media) to increase collaboration amongst partners, target markets, local audiences, and external audiences. This will be important for connecting communities.
  - Understanding the physical region, including the local culture and visitor service options to create a demand for visitors that will offer a return of investment.
  - Understanding visitor purposes and needs to increase length of stay by ensuring access to all amenities and attractions. This can be facilitated by the creation of partnerships.
  - Leveraging the local supply chain to promote local products, services, and partnerships.
- Group B also identified the following overarching topics:
  - Collaboration, which included education to build residents’ awareness about the value of tourism.
  - Branding and promotion for raising awareness of the unique region. This can be supported by selling South Kootenay merchandise and identifying a regional mascot.
  - Developing transportation options to improve the flow in and around downtown areas. This includes supporting active transportation and building and maintaining trails. Suggested projects include enabling scooter rentals and creating a pilot project for funding.
  - Industrial Improvements, such as the beautification of Teck (i.e., painting buildings, murals, and enhancing lighting) to improve the aesthetic appeal of the region and to promote industrial tourism.

## PATHWAYS AND FUNDING MODELS

**Context:** The question asked about different ways or models of funding to support the subsequent phases required to create a formal tourism management plan.

- Both groups identified the need to create a DMO.
- Creating a DMO would include:
  - Building trust, collaboration, and support among partners.
  - Implementing a Municipal and Regional District Tax (MRDT), and/or a hotel tax, and/or taxing “business tourists” (i.e., those who visit for business purposes).
  - Considering applying for Resort Municipality Status (e.g., see Whistler’s designation)
  - Collaborating with existing DMOs (i.e., Kootenay Rockies Tourism).
- Group B also identified how project-based funding could potentially support subsequent phases, which include:
  - Creating task groups to establish a short-term priority list of projects and action plans.
  - Identifying potential funders such as regional businesses, private investors, organizations like Columbia Basin Trust, and federal, provincial, regional, and municipal funders.
  - Approaching various funding and grant opportunities with “shovel ready” projects.

**For more detail about the project, please contact Erika Krest at [executivedirector@trailchamber.bc.ca](mailto:executivedirector@trailchamber.bc.ca)**