



COMMUNITY  
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Community Tourism Foundations® Program

# KIMBERLEY

## SITUATION ANALYSIS

### SUMMARY

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## **Situation Analysis Summary**

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A detailed analysis of current market trends and the status of the tourism industry in Kimberley are presented in the Situation Analysis Report (June 2007). The following section is a brief overview of this document. For details on source references – see full document.

### **Market Trends**

#### **General Travel Trends**

While tourism continues to be recognized as one of the world's fastest growing service industries, the opportunities associated with the industry must be understood in the context of market trends. The key trends affecting the industry within Canada include:

#### ***Changes in International visitation***

- An ongoing decline in US overnight trips, with those travelling by automobile showing the greatest level of decline. The fall in this particular market segment for Canada as a whole amounted to 5.2% in 2006. Given that the US sector represents 75.7% of the total international market, it is not surprising to note that international visitation overall continues to decline. In 2006 international visits to Canada fell by 3.2%.
- The decline of this market within BC is similar to national trends. 2006 data shows a decline of 6.5% when day visitors are included in the calculations.
- Growth from emerging markets to Canada compensates for declining numbers travelling from the US, and other key markets including Japan, Germany and the UK. Visitors from countries such as China, Mexico and South Korea have all shown significant increases. These increases are also reflected within BC.

#### ***Canadian Travel Patterns***

- Outbound travel is at an all-time high and increased by 7.7% in 2006.
- Domestic demand is strong and accounted for three-quarters of all tourism revenue in 2006.
- The most reliable market for BC is BC residents. However, in the Kootenay Rockies region the Alberta market is significant.
- The performance of the Canadian hotel industry continues to gain momentum. Revenue per available room is expected to rise by 4.8% in 2007, following a growth of 6.6% in 2006.

#### ***Socio-Economic and Political Factors***

- There are distinct differences between the various demographic segments that are driving market preferences. The Baby-Boom generation (1946-64) is the largest bulge and as this group swells the growth of the 55+ age group distinct changes in activity participation and demands can be expected, with a decline in the more physically demanding activities such as downhill skiing and an increase in nature-based 'soft' adventure. Generation X (1965-80) is a small cohort and is characterized by a high spend per trip, while Generation Y (1977-94) is a larger segment and is fuelling growth in the adventure travel industry in particular.

- The strengthening Canadian dollar relative to all currencies from key markets has hurt the price competitiveness of Canadian destinations. In addition to this, overseas destination marketing organizations have become more aggressive in their marketing campaigns and are succeeding in attracting higher numbers of visitors from Canada's source markets.
- Rising fuel prices and related travel costs and the Western Hemisphere Travel Initiative are contributing to reduced travel from the US. However, it is likely that these same factors will also increase domestic growth in travel.
- The role of the internet continues to expand as a critical element of the 'buying' process and the potential for converting "lookers" to "bookers" is growing. US based predictions have suggested that by 2011 38% of all travel will be generated online.

## The Growth in Niche Tourism

Visitors to a destination are increasingly seeking to be an active participant in the experience. They are looking to be emotionally involved, educated, challenged, entertained or surprised. With the growth of "experiential tourism" there has been a corresponding growth in niche sectors that can deliver an experience. The Canadian Tourism Commission's recent re-positioning of *Canada as a destination where travellers can experience extra-ordinary personal experiences* will heighten this demand for engaging experiences that goes beyond the traditional goods and services offered by the travel industry.

The growth areas of tourism that are of relevance to Kimberley include the following niche products:

### **Winter Tourism**

The Canadian Tourism Commission recognizes that winter tourism is both a challenge and an important opportunity for Canada's tourism industry. While hosting the 2010 Winter Olympic and Paralympic Games will undoubtedly strengthen British Columbia's position as a winter tourism destination in the market place, considerable effort will still be required to capitalize on this profile in areas outside the Lower Mainland. Current trends in the alpine skiing and snowboarding sector indicate that ongoing growth of these activities as a base for a community's tourism industry cannot be assumed. In 2002 the Canadian Ski Council identified a combination of negative forces that had the potential to seriously impact domestic participation, and this combined with a decline in the US market was cause for significant concerns over the longer term sustainability of the industry. Since then the Canadian Ski Council has been engaged in a proactive and aggressive campaign to stimulate growth in snowsports participation.

Recent growth in the BC winter tourism sector is encouraging, but much of this can be attributed to weather related conditions – less than ideal snow conditions in eastern Canada and Europe, combined with excellent snow-fall in BC. To ensure the longer-term viability of snowsports the Canadian Ski Council has highlighted the need for the industry to focus on *conversion and retention*. Their research has shown that resorts vary considerably in their ability to promote the activity and that there is a vital need to evaluate the overall resort experience and to develop competitiveness at this level if the industry is to maintain a good outlook. Turning visitors into repeat customers and growing the profitability of the industry for a community hinges not just on the quality of the ski terrain and associated infrastructure, but equally on the quality of the additional attributes of a resort and its community which should enhance the actual ski experience. The impact of demographic trends and the changing market expectations must be clearly

understood at the local level if resort-based communities are to maintain and strengthen their market position.

In other areas of winter sports and related tourism there are indicators of growth, with evidence of latent demand in activities such as snowmobiling. The key issue concerning many of these other activities relates to inadequate information on suitable sites and trails. While local users may be very familiar with opportunities, there is a tendency for community tourism organizations to overlook the importance of developing strong partnerships with community user groups to promote and develop these opportunities as a tourism asset.

### ***Golf***

Canada has one of the highest golf participation rates in the world (21.5%) – with 5.95 million Canadians currently playing golf. Not only has the participation rate grown, but so too has the average annual number of rounds. In 2001 work conducted on behalf of the Royal Canadian Golf Association estimated that there were 64.7 million rounds of golf – this had risen to 92.2 in 2005. Much of this growth is driven by core enthusiasts and similar trends have been identified in the US and Europe. Kimberley, is particularly well positioned to benefit from the high interest levels that exist in the Albertan regional market, and this combined with the expansion of the Cranbrook Airport and the potential to draw from new markets, will give the community a strong basis for building the tourism sector in the summer and shoulder seasons. The cross-participation between golf and many nature-based and cultural activities enhances the potential opportunities for Kimberley to build a dynamic tourism industry.

### ***Nature-based Tourism***

This encompasses a wide range of activities that take place within a natural landscape. Canada and BC in particular are well positioned to attract significant demand in this area and trends are demonstrating that young seniors and those aged 35 to 55 are fuelling growth in this sector with their demand for new and enriching experiences related to adventure, nature and culture.

The increase in soft adventure has been particularly marked and again reflects the demographic trends. The preferred activities include hiking, general nature observation, canoeing, cycling, mountain biking, fishing and cultural interpretation, and while many visitors undertake these activities independently, the demand for guided services and packaging is growing.

Within the Kimberley area there is significant potential to develop mountain biking and off-road cycling as a sub-sector niche market given the variety of trails that exist in the area, the association of the region with the Trans Rockies Challenge, and the Resort lift infrastructure. Mountain biking in particular is a growing segment of the adventure tourism market and the development of destination mountain biking is having a notable impact on the local economy of communities that have sought to build their competitiveness in this niche market. As such, mountain biking can be a key attractor, while facilities designed for more generic trail riding can provide an important secondary experience and can increase the length of stay.

### ***Culture and Heritage Tourism***

The growing demand for experiential tourism is paralleled with an increasing level of interest in arts, culture and heritage products, including Aboriginal culture tourism. As visitors seek to 'connect' with a destination, there is rising demand for tourism product that gives them insight into the character and essence of the local landscape. While culture and heritage may not be a primary motivator in a destination, it has become critical as a complementary experience and plays a key role in extending the length of stay. Moreover, developing this type of product within a

community is important in sustaining local arts and culture and enriches community life for local residents. This in turn can assist in attracting new economic migrants and investment funding into an area. The work that the Canadian Tourism Commission is doing in raising the profile of the country's culture and heritage product is creating a new awareness and potential demand for community-based experiences, and communities should explore opportunities to develop related product.

Within Kimberley this sector is growing in strength and its capacity to attract visitors in its own right has expanded. A vibrant arts sector, a growing number of festivals and events, and the recent expansion of the Sullivan Mine Interpretive Centre and the Bavarian City Mining Railway together offer a significant resource base for building a strong culture and heritage tourism sector and enhancing other community-based tourism experiences.

### ***Meetings and Conventions Market***

The meetings and conventions market is worth approximately \$500 million in visitor revenues to BC and is a high yield market. While much of this business is generated in the Lower Mainland, Victoria, and in communities with purpose-built regional conference facilities such as Penticton, the sector still offers other areas considerable potential to build a stronger shoulder season tourism market. Research indicates that the smaller corporate meeting and the small social/leisure gathering both represent opportunity for this sector. However, capturing and developing this market requires a sophisticated approach to managing it with facilities such as on-line booking and/or centralized reservations services, dynamic packaging, and a well planned, interactive website aimed directly at meeting the needs of event planners.

### ***Trends in Wellness***

New niche tourism products are developing in response to a growing concern and interest in issues that relate to person well-being and environmental ethics. Products that embrace these changes in lifestyle values are becoming important elements within a destination and have the capacity to attract new market segments as well as adding value to the existing visitor experience. The spa and wellness sector has seen significant growth in recent years with revenue from the overall industry growing by 30% in 2005 alone. Destinations such as the Yukon are recognizing the potential of aligning this new sector with traditional outdoor products in a way that enables the territory to reposition the destination and attract new markets. Similarly, culinary tourism is emerging as a product in its own right and one that also has the potential to strengthen existing sectors. Regions with an agricultural industry are discovering the benefits of marketing regional cuisine as an experience that allow the visitor to appreciate new qualities of an area. These culinary opportunities, which can be associated with other products such as local wines, arts and culture, are creating the ambiance and sense of uniqueness that assists a community with building competitive advantage.

## **Context and Overview of the Tourism Industry in Kimberley**

### **Community Planning**

While there is no specific tourism plan in place for Kimberley, the focus of community consultations and recent planning has given tourism related issues a high priority. The community development and land-use planning processes and related documents that were reviewed in the Situation Analysis include:

- *The Kimberley Residents Want – 2003;*
- *The City of Kimberley Official Community Plan – July 2005;* and
- *The Business Vitality Index – Kimberley Assessment 2005.*

The findings and the associated policies of these processes all emphasize the need to maintain Kimberley’s community character and charm while pursuing compatible and sustainable economic development, including tourism. Developing Kimberley as a destination for arts and culture, diversifying the social and recreational facilities and services, particularly those related to athletic training, creating a new conference venue, improving infrastructural elements such as transportation and community signage, designating revitalizations areas, and raising the profile of Kimberley in the market place were all elements identified as strategic priority areas. The Tourism Plan has sought to strengthen the implementation of these policies through integrating them into the tourism strategies.

In addition to these community-wide planning initiatives that have occurred in recent years, the Situation Analysis noted a number of facility and site planning reports that are still current and therefore part of the context for tourism planning. These included:

- *Recreation Trails Master Plan;*
- *Kimberley Nature Park Management Plan;* and
- *Kimberley Alpine Resort Master Plan.*

The trail network and Kimberley Nature Park are important assets for both residents and visitors and the focus of the related plans is to manage and develop them effectively for non-motorized multiple compatible uses. The Resort Master Plan was written to guide the development of the Resort following the City of Kimberley’s sale of the facilities and land. The overall objective was to develop a *Mountain Resort designed to act as an unparalleled, high quality, regional/destination recreation attraction.*

## **Tourism Product and Destination Experiences**

### **Key Tourism Sectors and Attractors**

#### ***Winter Tourism:***

**Kimberley Alpine Resort** offers the winter tourism experience associated with the Mountain and a summer experience associated with Trickle Creek Golf Resort. The Resort is located approximately 3 km from City Centre making it one of the closest mountain resorts to an existing settlement. Total rise is 751m and use of the mountain is facilitated through one quad lift, two triple chairs, two double chairs, and a tee bar. The Resort is owned and operated by the Resorts of the Canadian Rockies (RCR). While the Trickle Creek Residence Inn by Marriot is the focal accommodation venue for the resort, there is a wide selection of new condominium developments on the Mountain with the majority of these available as visitor accommodation.

In summer months Kimberley Alpine Resort offers access to the Mountain for mountain biking. Operational costs associated with running the main Quad Chair have been met through partnership funding between accommodators and RCR. In 2006 RCR increased its contribution but reduced the hours of operation to Thursday through to Sunday.

### Key Tourism Sectors and Attractors

In addition to the alpine ski and snowboarding terrain, there are a range of other winter activities associated with Kimberley. Nordic skiing opportunities include 33 km of double set track that is groomed with 3.4 km illuminated for night use. Other related activities include snowmobiling and dog-sledding.

#### **Golf:**

There are three 18-hole golf courses within the city – **Trickle Creek Golf Resort** – owned by Resorts of the Canadian Rockies and operated as part of the Kimberley Alpine Resort; **Kimberley Golf Club**; and **Bootleg Gap Golf Course** – a 27-hole public facility that opened in 2002 with an 18-hole championship course and a 9-hole short course. In addition to these three courses, visitors to the area are within easy reach of 18-hole championship courses at St. Eugene Mission Resort and the Cranbrook Golf Club, and a further recreational 18-hole course at Way Lyn Ranch and 9-hole facility at Mission Hills Golf Club.

The range of local golf facilities is set to expand with plans for two new golf communities in the Cranbrook area. Wildstone by Havadays Developments and Shadow Mountain Golf Community will both increase the tee-time capacity in the wider community and will offer new elements to the resort style experience in the area.

#### **Nature-based Tourism:**

The resource base for nature-based tourism includes:

- **Kimberley Nature Park** which is over 800 hectares and features more than 100 kilometres of trails for a wide variety of non-motorized recreation activities.
- **Kimberley Trail Network** – an extensive network of other trails in the community that provide a setting for a wide variety of trail recreation opportunities and connect many neighbourhoods and recreational sites together. Signage and an excellent trail guide promote use of these facilities.
- The development of the proposed **Cranbrook to Kimberley Rails to Trails Initiative** will further strengthen the community's position as a destination with a range of trail opportunities.

Beyond the immediate community boundaries, there are excellent back-country areas and provincial parks that have the potential to offer visitors to Kimberley a wide range of nature-based activities, including river rafting, fishing and swimming. A small number of operators have established a variety of outfitting and guiding businesses to assist visitors in experiencing such activities.

#### **Culture and Heritage Tourism:**

This sector of tourism is growing in significance and offers considerable potential to attract new visitors and enhance the stay of visitors who have been primarily attracted by other product sectors.

- **The Sullivan Mine Interpretive Centre and the Bavarian City Mining Railway** – this facility has been operating as an attraction since 1984 and offered a 7.5 km train ride that connected the visitor from a location near downtown Kimberley along the Mark Creek to the Kimberley Ski

**Key Tourism Sectors and Attractors**

Village, together with the opportunity to walk through or view historical buildings and associated displays at the SM&R Downtown Railway Station. In May 2007 a major extension to the visitor experience opened. The new component is the underground railway tunnel through a massive rock ridge in the Mark Creek Valley. Visitors have the opportunity to disembark underground to take guided walks and view active displays of historical mining equipment in original work settings, and static displays of the mining story.

- **Festivals** – there is a strong festival sector in Kimberley. The city is perhaps best known for its annual **Kimberley International Old Time Accordion Championship (KIOTAC)** which has been taking place for over 30 years and personifies the Bavarian theme that was associated with the city. New festivals are being developed that highlight key product sectors, such as the Kimberley Festival of Golf and Winterfest, while events such as the Festival of the Arts further strengthen the culture and heritage sector.
- **Arts and cultural** – the development of Kimberley’s arts and cultural sector has largely been led by the Kimberley Arts Council with much of the activity based in **Centre 64 Art Gallery**. This building houses a Gallery, exhibition spaces, a studio and a theatre stage area that seats 124 people. Kimberley Summer Theatre, a professional theatre group, provides daily musical drama production in the Centre 64 theatre throughout the summer months. In addition to the performing arts, the cultural sector in Kimberley includes a range of artisans and arts and crafts retail outlets.

**Community Facilities:**

- **The Platzl** – This area of Kimberley is the main tourism focal point in the down town area. It offers a wide range of dining and unique retail experiences, and has the potential to be a key gathering point for visitors. During festival periods the Platzl provides an excellent backdrop for a wide range of events and entertainment. The pedestrianized area was modelled on the Bavarian theme and presents a European atmosphere. It includes the largest free standing Cuckoo Clock in North America and the Kimberley Heritage Museum.
- **Sport product** – with recent and proposed infrastructural developments in Kimberley, the city’s ability to host regional, provincial and national sporting events is increasing. The new Aquatic Centre and the proposed Paralympic Training Facility, together with the Resort facilities will raise the profile of the community as a sport tourism destination. Its status as a winter sports venue will be significantly strengthened with its hosting of the 2008 BC Winter Games in partnership with the City of Cranbrook.
- **Cominco Gardens** and **Marysville Falls** are additional local sites of interest that are popular with the visitor.

**Accommodation:**

The availability of accommodation in Kimberley has expanded dramatically in recent years with the development of a wide range of new properties on the Mountain. The total number of units in Kimberley is approximately 546 (1046 beds), with a further 140 campsites at Kimberley Riverside Campground. Accommodation is ‘graded’ according to a community-based ‘Gold’, ‘Silver’, and ‘Bronze’ quality rating scheme. However, the type of accommodation that is being marketed to the visitor is not typical of conventional supply in many destinations and has a significant under-representation of hotel/motel rooms. Much of the condominium style accommodation on the

**Key Tourism Sectors and Attractors**

Mountain is privately owned and available for visitor use through rental pools. The demand for investment properties and second homes is driving the nature of future build-out. A further 170 two- and three-bedroom units are planned, together with 60 one- and two-bedroom units, and 90 duplex, triplex and quad-plex buildings.

**Characteristics of the Visitor and the Visit**

Reported visitor statistics from the Visitor Centre in Kimberley, Kimberley Vacations (KV), and Kootenay Rockies tourism association were reviewed to determine general characteristics of the visitor and the visit. No attempt was made to quantify the size or value of the industry as the data required to facilitate such a process is not available. Data in general is limited and building a profile from what currently exists is difficult and must be interpreted with caution.

**Characteristics of the Visitor and the Visit**

***Market Origin:***

- The largest market of origin for Kimberley is Alberta (31% in the 2006 VC data), followed by local (22%) and rest of BC (18%). The US market represents approximately 10% according to VC data. The strength of the Albertan market is more pronounced when KV data is reviewed, with 76% of the 2006 reservations coming from this sector.
- Similarly, the Kootenay Rockies golf tracking program show that over 40% of green fees for all 23 destination golf courses originate from the Calgary area with a further 14% from Edmonton. Given that approximately 20% of this business is attracted to the Kimberley-Cranbrook courses it is safe to assume that the origin of golf visitors to the community is likely to show a similar high proportion of Albertans.

***Product markets:***

- The key product markets identified in the planning process are the winter tourism market, the golf market, and the festival and events market. The recreational touring market is likely to be significant in the summer months.
- Mountain biking has potential to grow as a product market but the community's profile and capacity in this sector is still limited in scope.

***Length of Stay and Seasonality:***

- The only available data on length of stay is the data generated by the VC. The accuracy of this data cannot be determined although it is likely that it does not capture all repeat visitation and the longer lengths of stay that may be associated with this sector. In the absence of other data the Situation Analysis shows that 37% are day visitors. A further 45% stay at least two nights, with only 15% in total staying for one or more weeks. This suggests that Kimberley has considerable strength as a short-break vacation destination, which is further supported by anecdotal evidence.

**Characteristics of the Visitor and the Visit**

- With regard to seasonality, the VC data shows a clear peak in the summer months. The reported low numbers in the winter months does not reflect the visitation associated with the ski season and suggests that the VC does not capture much of the winter-related visitor data.

**Market Awareness:**

- The regional market with the highest level of familiarity with Kimberley is eastern Washington (research reported in the Situation Analysis show that over 28% of respondents indicated ‘familiar’ or ‘very familiar’). This was followed by Alberta (21.6%) and BC excluding the Lower Mainland (20.1%). The regional markets with the lowest level of market awareness were western Washington (5.7%) and the Vancouver area (7.6%).
- For those with an awareness of Kimberley as a destination, 45.2% associated the community with skiing. Despite the significance of golf to the area, only 11.9% highlighted this activity as a ‘tourism appeal’. All other attributes of the area were referred to by less than 10% of those with knowledge of the area. These results suggest that while there may be moderate market awareness of Kimberley as a location in BC, there is limited appreciation of what the community has to offer beyond skiing.

**Strengths and Areas of Concern**

The following table presents an overview of the tourism industry strengths in Kimberley and the key issues and areas of concern. This synopsis is based on the findings documented in the Situation Analysis and provides a rationale for the strategic direction of the Tourism Plan. Issues highlighted in italics reflects consensus based comments that arose from a workshop discussion on obstacles facing the industry.

Strengths	Issues and Concerns
<b>Organizational structure and management of tourism</b>	
<ul style="list-style-type: none"> <li>• Strong interest in tourism within a wide range of community organizations – including City of Kimberley, Kimberley Vacations, and Kimberley Chamber of Commerce. Each of these organizations shows significant commitment to developing the tourism industry and to working in partnership with a range of tourism related stakeholders.</li> <li>• The Resorts of the Canadian Rockies is a key stakeholder within the community and plays a major role in the delivery of the tourism experience. Good relations exist between RCR and the community-based structures.</li> </ul>	<ul style="list-style-type: none"> <li>• No one organization with a comprehensive mandate for the development of the tourism industry from a business perspective. This weakness has been clearly acknowledged and steps are in place to establish a new partnership-based organization that would oversee all aspects of the tourism industry and the implementation of the Tourism Plan.</li> <li>• Concern over <i>historical baggage creating a lack of trust</i> which in turn <i>may impede partnerships</i>. The ongoing dialogue regarding the new DMO structure appears to be off-setting this issue.</li> </ul>

Strengths	Issues and Concerns
<ul style="list-style-type: none"> <li>• Strong voluntary sector contributing to the management and delivery of elements of the industry, including the Kimberley Arts Council, KIOTAC and the Kimberley Nordic Club.</li> <li>• Good working relationship with Kootenay Rockies.</li> <li>• Good understanding of the importance of integrating tourism planning into economic development and land-use planning.</li> <li>• A good appreciation of various aspects of destination management, including the value of a centralized reservations service, packaging, and quality assurance.</li> </ul>	<ul style="list-style-type: none"> <li>• Insufficient funding support for tourism marketing and development on an ongoing basis. The obstacles workshop noted that <i>uncoordinated resources is preventing economic vitality</i>. Again, the DMO work that has been undertaken is attempting to address these issues through voluntary contributions from stakeholder groups. This increased availability of funding will facilitate the implementation of the Tourism Plan.</li> <li>• No appreciation of the total value of tourism to the region. Stakeholders need to develop an understanding of their role in reporting performance and steps need to be put in place to collect the necessary data.</li> </ul>
<b>Tourism infrastructure</b>	
<ul style="list-style-type: none"> <li>• Destination attributes – located on a key north-south transportation route; good proximity to Alberta and regional US markets.</li> <li>• Cranbrook Airport – major expansion underway that will open up new long haul national and international markets.</li> <li>• Commitment to improve community signage and ensure that the visitor can move around the community with relative ease.</li> <li>• 546 accommodation units and 140 campsites. A further 320 accommodation units in the development stage. Quality of accommodation is good and the community rating system assists the visitor in selecting appropriate accommodation.</li> </ul>	<ul style="list-style-type: none"> <li>• Poor transportation linkage with Cranbrook Airport. This is a significant issue given the expansion plans and the potential of accessing new markets.</li> <li>• Inadequate connectivity between the Resort and downtown – particularly the Platzl. A shuttle bus service funded by various stakeholders has been put in place during peak seasons, but the sustainability of funding for this remains an issue.</li> <li>• Very low annual occupancy rate for the accommodation sector (20%). While the ownership structure of a significant proportion of the accommodation sector may be resulting in under-reporting of occupancy, it is likely that the skewed nature of the accommodation stock and the lack of conventional hotel rooms are contributing to this low occupancy. There is a need to address this imbalance in the accommodation facilities.</li> </ul>
<b>Tourism product and product sectors</b>	
<ul style="list-style-type: none"> <li>• Destination attributes – good climate for a four-season destination resort; small-town ambiance with a unique alpine character; pedestrianized and atmospheric Platzl area with excellent potential to be a key gathering point; good range of dining experiences; good retail sector.</li> <li>• Proximity of the Mountain to the city. Good ski terrain and ski infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>• Despite resource base, specific nature-based tourism sector has limited profile. Low level of packaging associated with activities outside the golf and alpine skiing/snowboarding sectors.</li> </ul>

Strengths	Issues and Concerns
<ul style="list-style-type: none"> <li>• Strong nature-based tourism assets with potential to expand a range of niche products. Excellent trail network. Considerable opportunity to further develop a mountain biking niche product.</li> <li>• Growing range of heritage and cultural tourism product. The expansion of the Sullivan Mine and Railway experience will assist in attracting new short-stay visitors passing through the corridor, and will enhance the visit of those on over-night visits.</li> <li>• Arts sector and the festivals sector both growing in their significance to the tourism economy and in their ability to contribute to resident’s quality of life.</li> <li>• New and proposed tourism product development will assist in growing the tourism economy, developing new niche markets, and increasing the profitability of shoulder season business.</li> </ul>	<ul style="list-style-type: none"> <li>• There are insufficient facilities and activities to meet the expectations of visiting families. Family-oriented product, such as the mini golf course, has been removed to make way for new accommodation development. This has become a significant issue, particularly given the fact that the Resort positions Kimberley as a family resort.</li> <li>• Limited retail and entertainment opportunities in the evening. Potential of Kimberley Summer Theatre constrained by limited seating.</li> <li>• The limited connectivity between the Resort and the Platzl has the potential to significantly undermine the visitor experience. Issues associated with accessing the Platzl combined with restricted retail opportunities does not align with market expectations of a Resort experience.</li> <li>• The Resort’s late date of winter opening compared to other ski resorts, particularly when snow conditions are good, has the potential to undermine the market image and positioning of the community as a winter destination and results in lost local and regional business.</li> <li>• The evening ‘family’ experience at the Resort in the winter is more limited than competitive resorts. Activities have been offered in the past but these were discontinued. The research of the Canadian Ski Council has demonstrated that it is ‘polish factors’ such as evening entertainment that determines the competitiveness and longer-term sustainability of a resort and its adjacent community.</li> <li>• Kimberley has excellent potential to develop a viable mountain biking and trail riding niche sector, but there has been insufficient strategic commitment to developing and promoting this market. Building this sector would assist in diversifying the summer experience and extending the length of stay.</li> <li>• There are limited retail outlets for local artisans. The arts and craft sector can play a key role within a tourism community and opportunities for strengthening the profile of this sector needs to be examined.</li> <li>• Tourism industry remains seasonal with implications for the viability of businesses and staffing. The proposed development of the conference centre and a greater focus on sport tourism will help to offset this seasonality.</li> </ul>

Strengths	Issues and Concerns
<b>Marketing and communications</b>	
<ul style="list-style-type: none"> <li>• Kimberley Vacations (KV) acts as the community's lead tourism marketing organization.</li> <li>• There is a single call to action on all material prepared by KV, including Golf Kimberley marketing collateral.</li> <li>• Kimberley Chamber of Commerce runs the Visitor Centre. The VC is located in the Platzl parking lot and serves the needs in the downtown area.</li> <li>• KV's role as a central reservation service assists in 'closing the sale'.</li> <li>• Strong support from Kootenay Rockies to assist Kimberley.</li> <li>• AHRT in place – will increase levels of funding available for marketing.</li> </ul>	<ul style="list-style-type: none"> <li>• No marketing plan in place.</li> <li>• <i>Fragmented identity and branding issues.</i></li> <li>• Positioning of the community needs to be strengthened.</li> <li>• Visitors staying on the Mountain without a vehicle will have problems accessing visitor information services.</li> <li>• Limited processes in place for market research and data collection – there needs to a greater understanding of the role of performance data and commitment to providing it.</li> <li>• Inadequate understanding and appreciation of tourism by the wider community – <i>lack of understanding of tourism is impeding development of tourism economy</i></li> </ul>