



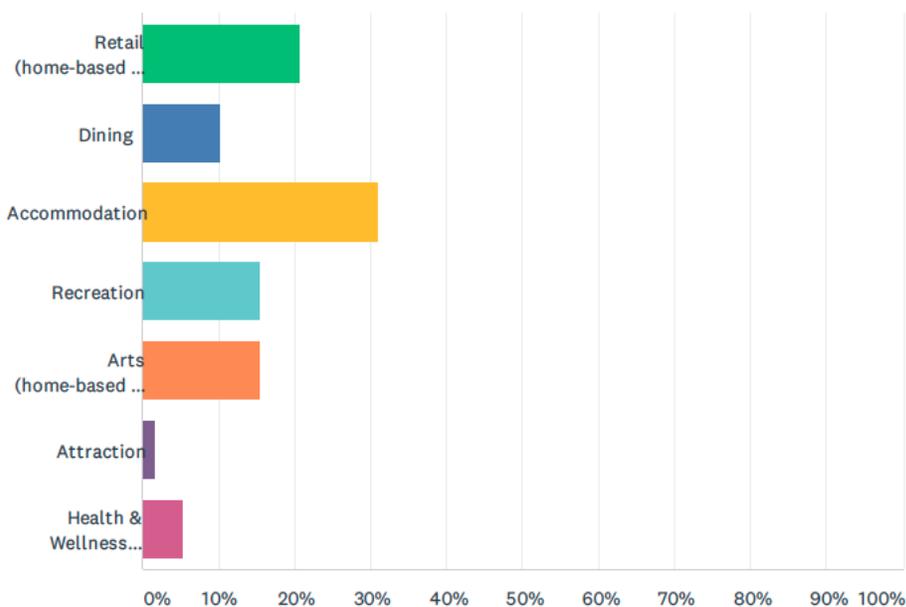
WINTER 2020 - PARTNER SURVEY REPORT

METHODOLOGY

To track the pulse of tourism in the Nelson and Kootenay Lake region throughout Winter 2020/21 (December 2020 to March 2021) during COVID-19, a survey was sent out to 212 tourism-related businesses (181 unique emails) that are NKLT members. Members were given from April 28 to May 29 to complete the survey and were informed through SurveyMonkey, email, newsletter, and on NKLT Facebook Group.

RESPONDENTS

58 businesses completed the Winter 2020 survey which represents 27% of the 212 businesses. Fall Survey had the exact same percentage of completed responses. Respondents were from seven different sectors. The members who completed the survey are quantified as follows: Accommodation – 31%, Retail – 20%, Dining – 10%, Arts – 16%, Recreation – 16%, Health/Spa – 5%, Attractions – 2%. The data is not conclusive, but it is a good sampling and warrants recognition, action, and validity.

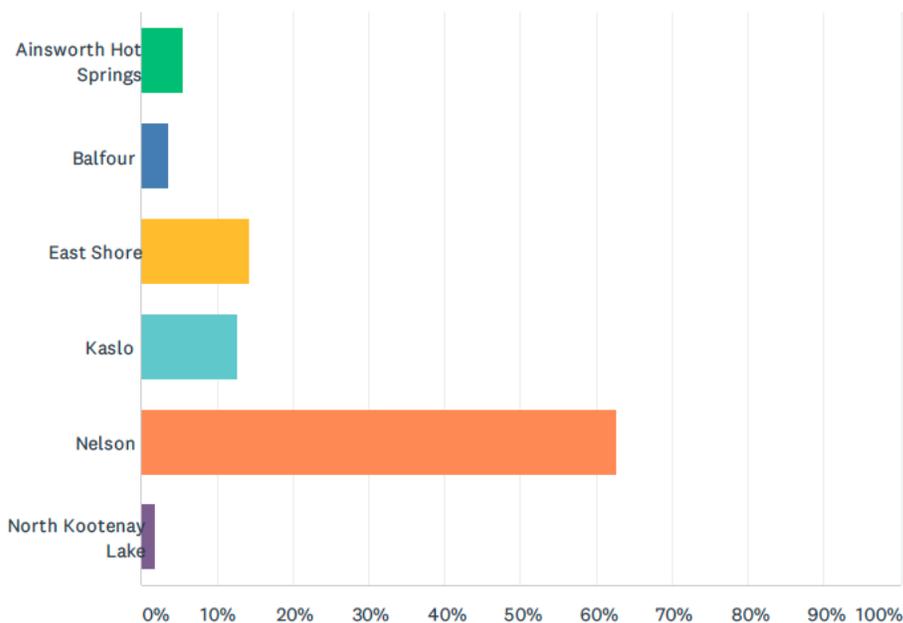


LOCATIONS

The respondents were located in all the communities around Kootenay Lake. The percentages are somewhat reflective of the number of tourism businesses (212 across the region) in each community. The data therefore fairly represents the entire region. 62% respondents were from Nelson (117

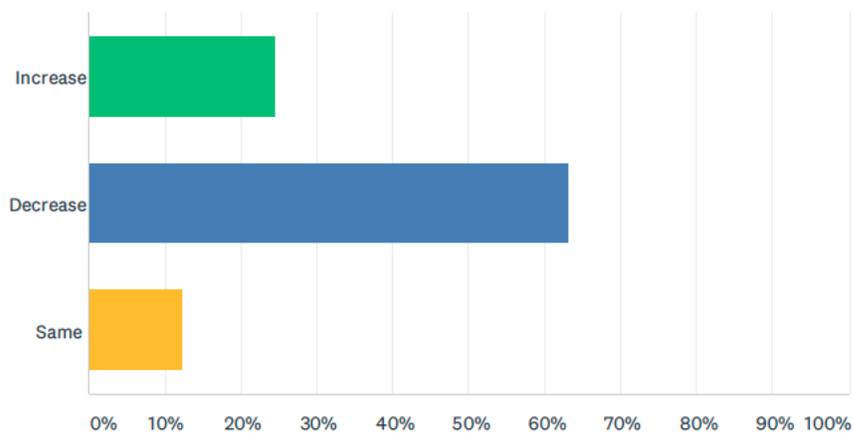


businesses), 14% East Shore (28 businesses), 12% Kaslo (32 businesses), 5% Ainsworth Hot Springs (9 businesses), 4% Balfour (14 businesses) and 2% North Kootenay Lake (7 businesses).



SALES

The travel restriction announcements in November 2020 encouraging “local travel only” resulted in 65% of businesses seeing a decrease in sales over the year previous. 25% of businesses had an increase in sales, 12% remained the same over the year previous.



Winter sales at tourism businesses compared to 2019, excluding accommodation, varied from down 100% to up 200%. The 30 respondents who completed this data verifies the following averages:



- December – up 4%
- January – down .07%
- February – up 2.6%
- March – up 21%

Accommodators provided occupancy rate data over the winter, but the numerical format varied resulting in inaccurate data collection. In the spring 2021 survey this question will need to be presented differently to collect accurate data.

EMPLOYEES

This was the first time collecting the number of employees working in the tourism-sector across our region. For this winter survey, 33 of the 58 respondents completed this question, which was 15% of the 212 businesses. Full- and part-time employees in the tourism sector is therefore estimated at 1908.

FULLTIME

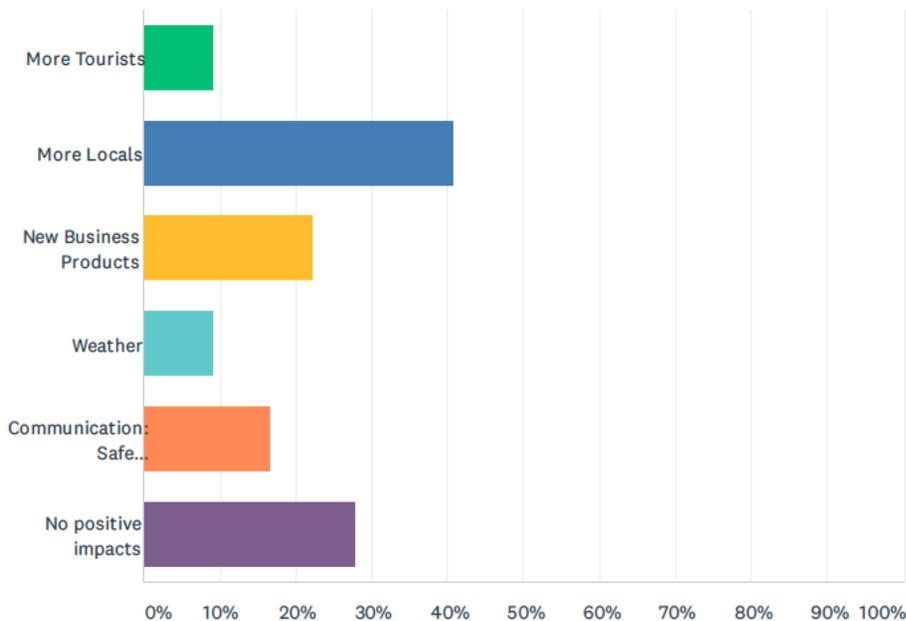
Full-time employee numbers ranged from 1 to 40. The average number was 5 employees, with a total number of 239 employees. This data was not conclusive, but we can calculate that at an average of 5 employees and 212 tourism businesses across the region, the total would be approximated at 1060 full-time employees in the tourism sector in the winter 2020 season.

PART-TIME

Part-time employee numbers were also tracked. The average was 4 employees per business with a total of 184. Based on 212 tourism businesses in the region we can estimate there were 848 part-time employees in the tourism sector in the winter 2020 season.

POSITIVE IMPACTS

Businesses saw positive impacts with an increase in locals, new business products, and safe communication. 27% however saw no positive sales or occupancy impacts.

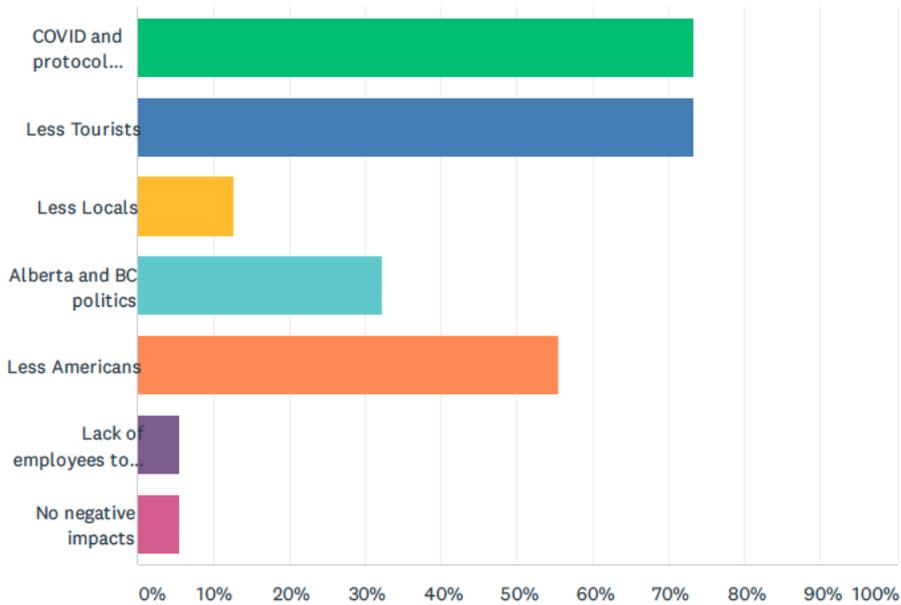


COMMENTS

- *Positive- local getaway; Negative- Covid restrictions*
- *Christmas sales were a positive impact*
- *Not that I wanted more tourists at the time, I was grateful for the public health oversight and mandates for safety.*
- *We couldn't have afforded to operate without CEWS*
- *A good portion of the guests were from essential work (primarily contractors/trades people).*
- *I lost 90% of my guiding business that usually makes up for 50% of my overall business. I countered that by doubling my AST business. A true local success story.*

NEGATIVE IMPACTS

COVID-19 and the PHO (Provincial Health Officer) request to not travel outside of our area and stay home had a massive negative impact. 73% of respondents noted the health protocols and lack of tourists as negative impacts. 55% were affected by the lack of American travellers. With the travel restrictions NKLT purchased local media (print, radio, magazine) encouraging the Staycation and shopping local at businesses in-store and on-line. The Alberta and BC political dialogue played a negative role, noted by 32% of the respondents. Only 5% of businesses were impacted by lack of employees and 5% saw no negative impacts to their business.

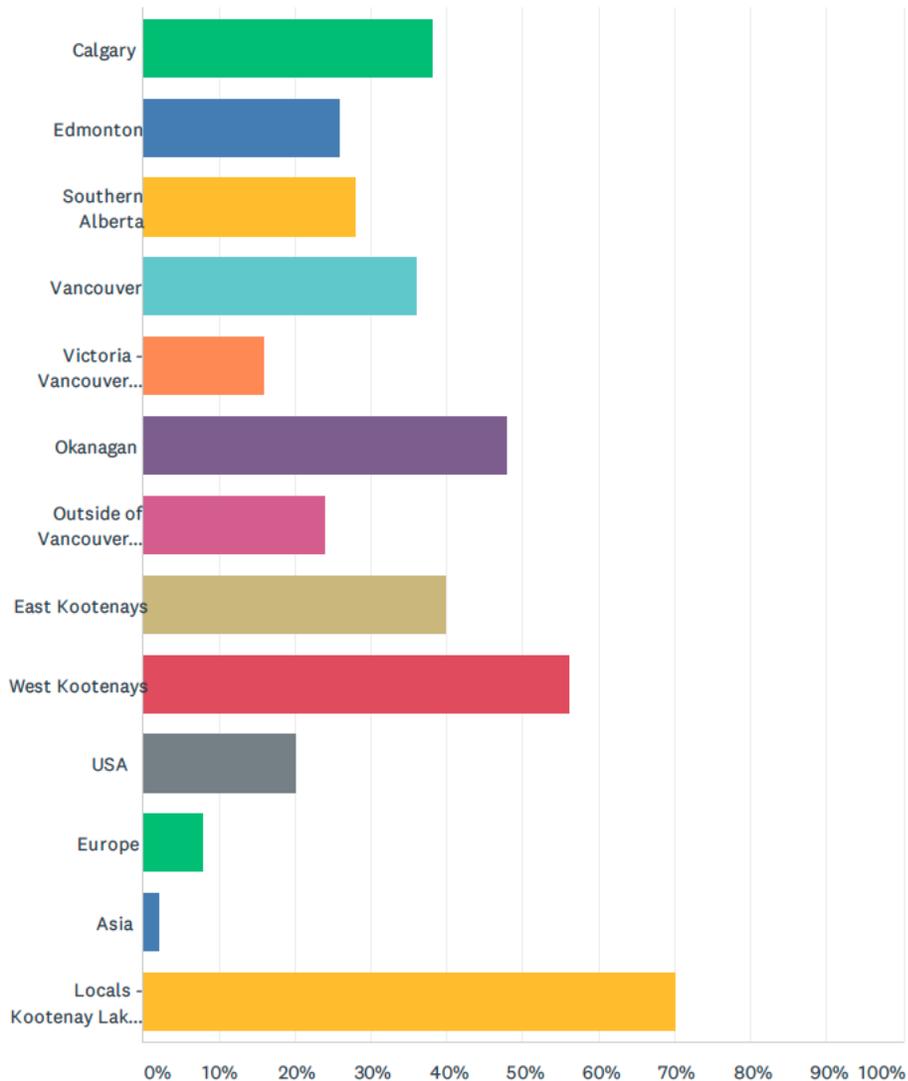


COMMENTS

- *Due to COVID and a lack of sustainable business we chose not to operate this past winter*
- *Lack of markets impacted my business negatively*
- *Weird winter, didn't close as usual, more phone orders, less walk ins*
- *We long term rented our accommodations this winter*
- *We did okay but the increase was likely due to the Kootenay lake fishing incentive*
- *Online sales increased substantially for xc and bike, but lack of tourism decreased downhill sales.*

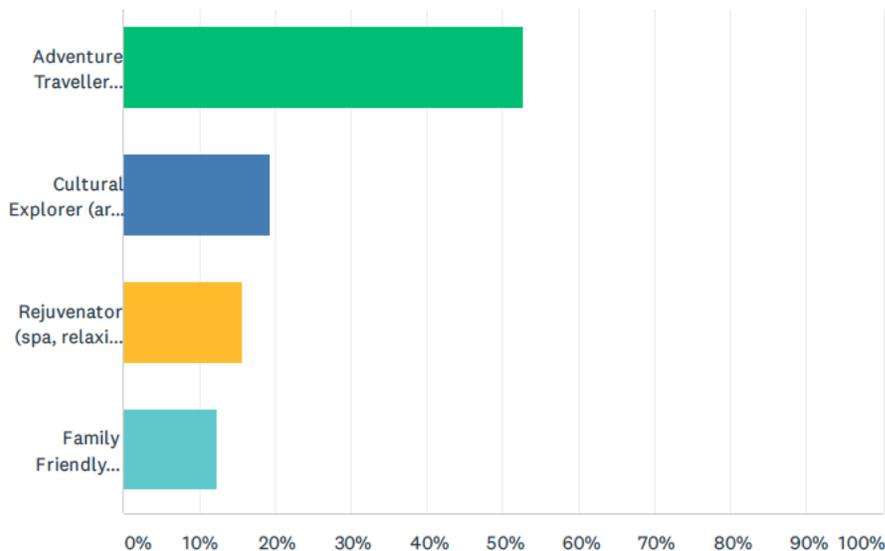
LOCATIONS

Visitors were mostly from the West Kootenay area, followed by Okanagan, East Kootenay and then Calgary and Vancouver. Locals were the top people travelling around and supporting tourism businesses. #thinklocalfirst and local marketing campaigns, and just down-right awesome people in all the communities allowed businesses to continue to operate, and some very successfully.



TRAVELLER TYPES

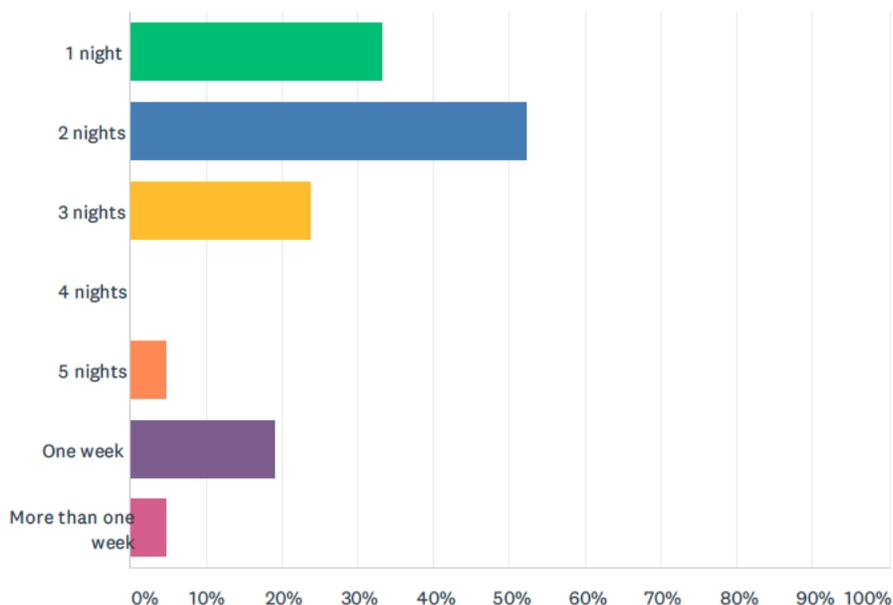
Adventure Travellers were our main audience with 53% of travellers fitting this traveller type. This data mimics previous seasonal surveys. Cultural Explorers were next, at 19% followed by Rejuvenator at 16% and Family Friendly at 12%. The only shift from Fall to Winter was a decrease in family visitors in the winter. NKLT will continue to market to these traveller types, with focused messaging and media.



LENGTH OF STAY

Visitors were staying primarily 2 nights. 1 night and 3 nights were popular, but this is a shift from previous years at 4-6 night stays. Lack of American visitors throughout the winter was probably a key factor in the decrease in night stays.

We will continue to work on increasing length of stay when travel opens up and we can market to people outside of our region – Finding Awesome, again.





SUMMARY

Overall, winter 2020 was a challenging season due to COVID-19 travel restrictions, health regulations, and lack of travellers from outside our region. However, the bright spot is that locals stepped up. Travellers stayed close to home, were [SMART](#) about their travel decisions, did staycations, and shopped and dined locally.

The value and importance of travel continues to be an interesting area of study as the mental health of individuals, of all ages and economics, battle the desire to explore, but are required to stay home. NKLT will continue to tell our unique story through the Our Place video series, with the deliberate message to keep the region front of mind.

Once things open up and travel is permitted, there will be a massive amount of people travelling. We will need to be aware of this, manage it, and continue to communicate to visitors the aspects that make our region what it is: safe, beautiful, quiet, quaint, sophisticated, and an awesome visitor experience.

“Thanks for all your efforts to this point and in the recovery!!”

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