

# + LIFT

## THE RIGHT HEIGHT FOR DESTINATION DEVELOPMENT AT SILVER STAR

Destination Development Plan 2028



DESTINATION  
**SILVER STAR**





DESTINATION  
**SILVER STAR**

Destination Development Plan 2028

November 24, 2023

Destination Development  
Planning by

*Travel Local*  
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# 1. EXECUTIVE SUMMARY

The *Destination Silver Star Destination Development Plan 2028* is focused on creating a future resort community that's sustainable, attractive, and supports a competitive advantage. The aim is to thrive, not only grow, and so, the ultimate goal is to continuously improve community well-being.

Modern destination development strategy, grounded in the principles and ideas of market-based management, community economic development, Indigenous reconciliation, and regenerative economics, offers destination managers solutions that align with the call for greater community leadership and bottom-line solutions that improve local well-being.

Mixed-methods research and community engagement focused on identifying sources of advantage that would see the resort community thrive and grow; underlining destination assets, strengths, and opportunities that should be leveraged or improved on; and uncovering local economy solutions that would improve resort community well-being.

Analysis and feedback results were triangulated to look at the story the data was telling. Using a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) as a framework, the main driving insights were:

**Strengths:** A vibrant local economy supported by local residents; quality core offering in both seasons; small town feel that reflects a strong sense of community and unique character of Silver Star.

**Weaknesses:** Seasonality and lack of public transit both pose a challenge, as well as weak collaboration amongst local businesses and market conditions leaving some business owners unable to make a living.

**Opportunities:** Underutilized assets and experience offerings that broaden destination appeal; upsides that come with a premium brand hotel; service culture improvements; transportation and signage enhancements; affordable housing for local staff; and mixed-use master development plans that support a pedestrian economy and housing options for a wider range of guests and residents.

**Threats:** Labour shortages along with environmental emergencies, economic uncertainty, and intense competition are straining local staff and business owners.

The aim is to thrive, not only grow, and so, the ultimate goal is to continuously improve community well-being.

A complete summary of destination strengths, weaknesses, opportunities and threats is detailed in **Appendix A**.

Based on those principles and insights above, the following destination development focus and supporting key initiatives will continuously improve community well-being at Silver Star.



A total of five areas of focus have been put forward:

- 1. Insist on Transit-Oriented Development:** Increase accessible public transportation to resort by looking at co-operative service models that get staff and visitors up and down the mountain so that vehicle-based carbon emissions are reduced.
- 2. Build a More Redistributive, Resilient Local Economy:** Improve profitability of locally owned businesses by bringing together Silver Star operators to pursue scale efficiencies to ensure resort businesses continue to generate outsized local impacts.
- 3. Make Silver Star More Competitive:** Strengthen destination position and marketing effort by satisfying market-demand for an enhanced breadth and depth of on-mountain experiences so that Silver Star grows market share of visitors.
- 4. Fire-Up Economic Reconciliation:** Share decision-making power with local Indigenous communities to create win-win solutions that actively increase local Indigenous capacity and improve Indigenous community well-being.
- 5. Empower People to Achieve:** Nurture a resort culture that fosters creativity, fresh perspectives, and understanding by implementing and encouraging Destination Silver Star (DSS) members to enforce policies and programs designed to empower and include diverse people to make the DSS vision a reality.

The main strategy and key initiatives for each are summarized in **Section 7** of the *Destination Silver Star Destination Development Plan 2028*. Suggested milestones and estimated costs for each key initiative are detailed in supporting tables to help set short-, medium-, and longer-term planning priorities.

## 2. PROJECT OVERVIEW

A destination's experience or product position coupled with its destination marketing effort are the two main factors that influence a destination's market share. The *Destination Silver Star Destination Development Plan 2028* considers only the first part of that equation, requiring an analysis of the destination experience, supporting infrastructure and assets, overall tourism-related business needs and inputs like labour, transportation and logistics. The overarching goal is to create a destination position that's sustainable, attractive and supports a competitive advantage.

The goal is to create a destination position that's sustainable, attractive and supports a competitive advantage.



Before COVID, destination development tended to be supply-driven and too focused on economic indicators that didn't necessarily signal whether a community was thriving. Global instability and a renewed commitment to sustainable travel has returned the focus to making sure that tourism provides more holistic benefits to the community.

Modern destination development strategy, grounded in the principles and ideas of Community Economic Development (CED), offers destination managers and tourism professionals new solutions that fall perfectly in line with the call for greater community leadership, and multiple bottom-line solutions that improve local well-being. This methodology is market-driven but also applies local economy solutions, knowing that a diversity of small and community-powered projects can also drive or support domestic and international visitor arrivals.

Using these principles and the new tools and solutions they provide, this report is able to present deeper strategic insights and use these, to make stronger recommendations. Key principles applied in the context of this plan are below.

### **Strategic Principles**

- Aim to Thrive
- Nurture Human Nature
- Favour Local Economy Solutions
- Be Distributive and Regenerative by Design

See **Appendix B** for a detailed summary of the above strategic principles. Altogether, the *Destination Silver Star Destination Development Plan 2028* is meant to be a key source of focus to make Silver Star more entrepreneurial, self-reliant, resilient, sustainable, and meaningful for locals and visitors alike.

### 3. DESTINATION PROFILE

Celebrated as a local gem, SilverStar Mountain Resort is a Top 100 resort in North America. Inspired by the “Silver Queen” mine, the first ski turns happened in the early 1930s. Nearly a century later, Silver Star is home to a thriving community and destination resort on the cusp of its next chapter.

Part of British Columbia’s Monashee Mountain Range, SilverStar Mountain Resort LLP operates on 3.3 skiable acres, making it one of the bigger resorts in BC. With a 760 m total vertical drop and 700 cm annual snowfall without a flake of man-made snow, the mountain has 132 marked runs. Perhaps less known is its extremely close proximity to Vernon, a thriving North Okanagan town only 22 km away. Silver Star is only 65 km from Kelowna International Airport (YLW), which offers more than 60 daily non-stop commercial flights between nine airlines.

In the summer, the mountain lifestyle switches gears with mountain biking on 69 km of downhill trails, 400 dirt jumps, and 70 km of x-country trails to explore. The resort is also home to some of the best lift-assisted alpine hiking in Southern BC with over 10 km of hiker-only trails and another 20 km that are multi-use.

The Silver Star Resort Association DBA, also known as Destination Silver Star (DSS), is the destination marketing and management organization mandated to maintain and enhance the Silver Star experience. Founded in 2021, Destination Silver Star is a not-for-profit, membership-based organization with approximately 1,000 members representing accommodations, attractions, restaurants, retail and homeowners. Its areas of focus include community and member engagement, marketing, sales, media relations, events, research, and destination development.

Current Master Plans will see significant private-sector development on private land that if done right, could ensure the resort community is sustainable, liveable and more competitive.

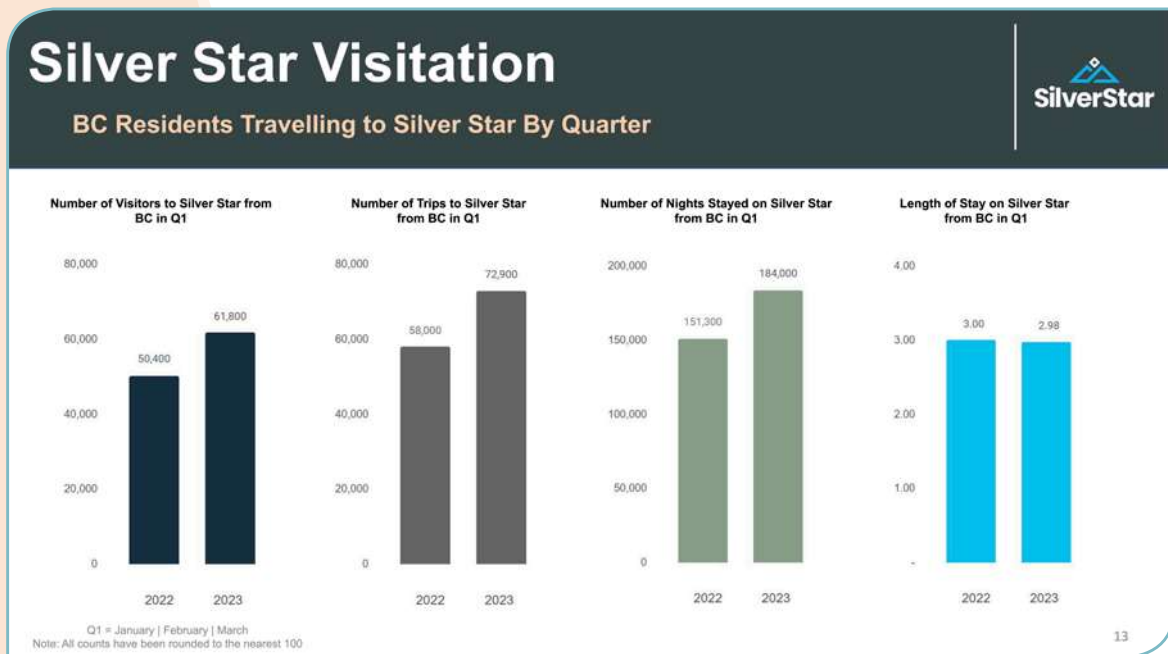




## 4. MARKET PERFORMANCE

With the longtail impacts of COVID still present, BC short-haul and neighbouring provincial markets continue to lead the recovery until international markets regain momentum in 2026.<sup>1</sup> See **Appendix C** for the latest performance data from Destination Silver Star.

Silver Star has made a strong winter season recovery across the board with visitor numbers, trips to the resort, and overnight stays showing marked increases over Q1 2023, compared to the same period the year before.<sup>2</sup>



Source: Silver Star Visitor Highlights 2023, Symphony Tourism Services and BC Regional Tourism Secretariat

### Market Trends

While many trends impact tourism supply and demand, below are some of the main market trends that play to Silver Star's strengths and market position.

#### Main Market Trends

- Gen Z
- Hiking
- True Local
- Economic Reconciliation
- Regenerative (and Generous) Resort Design

See the **Market Trends** section of **Appendix C** for a detailed summary of the above market trends.

<sup>1</sup> Destination Canada, 2023

<sup>2</sup> Silver Star Visitor Highlights 2023, Symphony Tourism Services and BC Regional Tourism Secretariat

## 5. RESEARCH & ENGAGEMENT

Destination development should always bring together different stakeholders to achieve the common goal of a more sustainable destination. More than just market-driven, it respects community identity and works to conserve and protect local assets that makes the resort livable and worth visiting. In this effort, well-rounded insights are required so destinations can plan for the future and fully consider the social, economic, cultural, and environmental risks and opportunities.

For this DSS work, the main research and engagement objectives were:

- Identify source(s) of ‘sustained’ competitive advantage that will see the resort community thrive and grow
- Underline destination assets, strengths and opportunities that should be leveraged or improved on
- Uncover local economy tourism solutions that improve resort community well-being

The process required the active participation of diverse stakeholders inside and outside the community (see **Appendix D**).

### COMMUNITY ENGAGEMENT HIGHLIGHTS

Survey: **213** responses

Facebook Group: **85** members

Community & Board Workshops: **+50** attendees

In-depth Member Interviews: **12**

Solution Groups: **2 sessions combined into 1** to facilitate attendance

Primary Data Points: **+2,000**

## Research Methods

A mixed methods approach was adopted with primary data collection being the most important source of strategic insights. Community engagement, field work, and data collection happened from May - November, 2023.

Relying on different techniques to ask similar lines of enquiry not only strengthens the reliability and validity of results, but it also cuts risk should any single method not deliver meaningfully.

## DESTINATION DEVELOPMENT RESEARCH PHASES



The research methodology followed a phased approach. The three key phases are illustrated above. After collection, data was clustered and themed to ensure that representation was provided, and that each insight was given weight.

A detailed summary of each research and engagement method can be found in **Appendix E** through **Appendix H**.

## Survey

The DSS Destination Development Survey was designed to capture wider community opinions and feedback on opportunities, the current state, and future outlook for Silver Star as a destination. See **Appendix E** for a full overview of the survey methodology and findings.

### *Key Insights*

- Early indications are that Silver Star businesses are bullish on their recovery, with some saying last year was their ‘best year ever.’ Others worry about a looming global downturn. Seemingly at odds with this, some businesses indicated strong worry noting business closures and difficulty making a sustainable living.
- Survey respondents indicated that the biggest destination development challenges facing business in the next five years are: Staff Housing, Labour Shortages, Economic Uncertainty, and Climate Change.



- 92% of businesses have no awards or certifications related to sustainability. Some measure or report their water usage, energy consumption, waste production, and carbon emissions.
- Small town feel and the sense of community are key aspects of the resort that locals, businesses, and home investors do not want to lose. The strongest and most unique assets to tourism and recreation at Silver Star were identified as its diversity of offerings, natural environment and family friendly atmosphere. Respondents added that Silver Star's proximity to nearby cities (ie. Vernon, Okanagan Valley, Int'l Airport) is undersold.

## Interviews

One-on-one, semi-structured interviews collected insights from key stakeholders to gather the same understanding of the current state and opportunities. Focused on getting a deeper perspective, a total of 12 in-depth interviews were conducted between May - November, 2023. See Appendix F for a full overview of the interview methodology and findings.

### Key Insights

- Visitors like Silver Star for its small town feel and diversity of quality year-round offerings followed by its sense of community, unique character and family friendly atmosphere.
- In terms of what Silver Star is doing well, resort management, maintaining standards and choosing value over volume were the strongest themes shared on this topic.
- Growing demand, dealing with environmental emergencies and economic uncertainty were top of mind as the external issues and trends that will have the biggest impact on Silver Star's business. Meanwhile, labour shortages and adequate staff housing are entrenching themselves as the most challenging internal operational issues that need solutions.
- Improved accessibility is an opportunity. Local adaptive programs should be 'ramped up,' while storefronts need proper ramping for people with disabilities.
- Sun Peaks stands as the competitive benchmark followed by Big White, Whistler, and Revelstoke.
- From the perspective of local business operators, growing summer as well as early season and late season where passes are less are key market development priorities. Others feel Main Street is an underutilized and underperforming asset.
- Sustainability is largely understood as involving a holistic approach. POWDR and SilverStar Mountain Resort LLP oversee Play Forever, which funds local charities that improve community health and wellness like new bikes for the local school district. Conversely, there is a perception that waste management needs urgent attention, including moving away from single use plastics.



Photo: Lianne Viau

## DSS Member Engagement Workshop

Field research was completed during the Destination Silver Star member workshop on September 11, 2023, to gather perceptions, attitudes and beliefs about the ecological, social and economic pressures facing Silver Star. A total of 50 stakeholders participated in the workshop that featured dynamic exercises and interactive technology. Key insights and findings from the workshop exercises are detailed below. See **Appendix G** for a full overview of the workshop methodology and findings.

## SUSTAINABILITY

### *Key Insights*

- Ways that the DSS community keeps the resort sustainable includes recycling and waste reduction efforts, the provision of experiences that contribute to health and wellness, as well as creating an accessible and inclusive environment.
- Silver Star visitors and tourism-related businesses contribute to social and ecological pressures through transportation emissions, waste production, and inadequate land use practices.
- Social and ecological pressures come back to create risks and impacts for Silver Star visitors and tourism-related businesses in the form of damage to the operating environment, the declining health and wellness of stakeholders, and rising costs due to resource scarcity and logistics chain interruptions.

## DESTINATION VISION

**Table 1** DSS Destination Goals, Measures and Targets

Destination Vision for Well-Being	Community Ranking	Goal	Measure	2024 Target
Experiencing Joyful Moments	1	Living, working and playing at Silver Star makes people happy	Happiness Index	Baseline
Connecting to the People Around Us	2	Silver Star has a strong sense of community	Sense of Community Scale	Baseline
Spending Time in Nature	3	Get people outside to improve their mental and physical well-being	Mental and Physical Health Metrics	Baseline
Feeling Safe and Secure	4	Provide a safe place to relax and let go of your day	Psychological Safety Measures	Baseline

Source: DSS Member Workshop 2023 | New Economics Foundation, 2008

In 2024, Destination Silver Star is committed to measuring community well-being in these four most important areas and setting a baseline and targets for 2025.

## COMMUNITY STRENGTHS

### Key Insights

- Empty buildings and commercial space, a Chilcoot Conference Centre that's too quiet, and mostly empty National Altitude Training Center topped the list of building capital that Silver Star members felt were the most under-utilized assets in the community.
- Local arts and heritage, mountain culture and vibrant culinary scene are storied opportunities. The challenge of activating Silver Star cultural assets was met with a long list of unique ideas worth further exploration like a welcome host dinner every fall for new staff, First Nations culture and history integrated into the community, local artist shows and author readings, wildcrafting interpretive tours, and film events celebrating mountain culture.
- Silver Star's natural space and quality terrain are strengths and present opportunities. Unsung natural capital mentioned was Proctor Lake, the full expanse of trails for nordic and fat biking, ample space for an outdoor amphitheater, going 'further and farther' with terrain extensions allowing for backcountry skiing and multi-day backcountry hiking loops with more lookouts over the Monashees, wildcrafting tours, adaptive adventures, yoga platforms and better trail network connections between Silver Star and Sovereign Lake.

## Solution Groups

In a Question Burst exercise focused on making local Silver Star businesses more resilient and helping employees with better transportation and housing, community members were able to zoom-in on key questions and work together to brainstorm an impressive list of early answers. See example below. Complete details on the Solution Group methodology and solution group ideas can be found in **Appendix H**.

### Q BURST 1

Problem	Most Important Question	Why is this Important?
Local Business Drought	How Can Local Businesses Work Together to Cut Costs and Scale Up?	Local small businesses need support building healthier bottom lines. Working together, they can leverage their superior business knowledge to become more resilient and sustainable.

### *Solution Group Ideas*

- Combine bulk buying power to purchase commonly used par stock and food ingredients to reduce costs.
- Leverage common infrastructure needs like developing a shared commissary kitchen to cut overhead and also operate the space as a village employee kitchen where affordable meals could be purchased using pooled ingredients, resulting in less kitchen waste and improved employee mental health for youth needing connection and community.

## Indigenous Engagement

A holistic tourism strategy and plan would not be complete without Economic Reconciliation in mind that's focused on intentful inclusion of First Nations partnerships. Concrete actions that generate measurable outcomes for neighbouring Indigenous or entrepreneur-owned tourism businesses should be taken.

The Silver Star community lives, works and plays on the ancestral territory of the Okanagan (Syilx) and Secwepemc. Over the course of this planning project, outreach has focused on engaging with the Okanagan Indian Band (OKIB) directly with further plans to engage the Splotsin First Nations members.

Economic Reconciliation plans are ongoing and will remain open and flexible to the cultural needs and values of Indigenous partners (see **Fire-Up Economic Reconciliation** focus in **Section 7**).

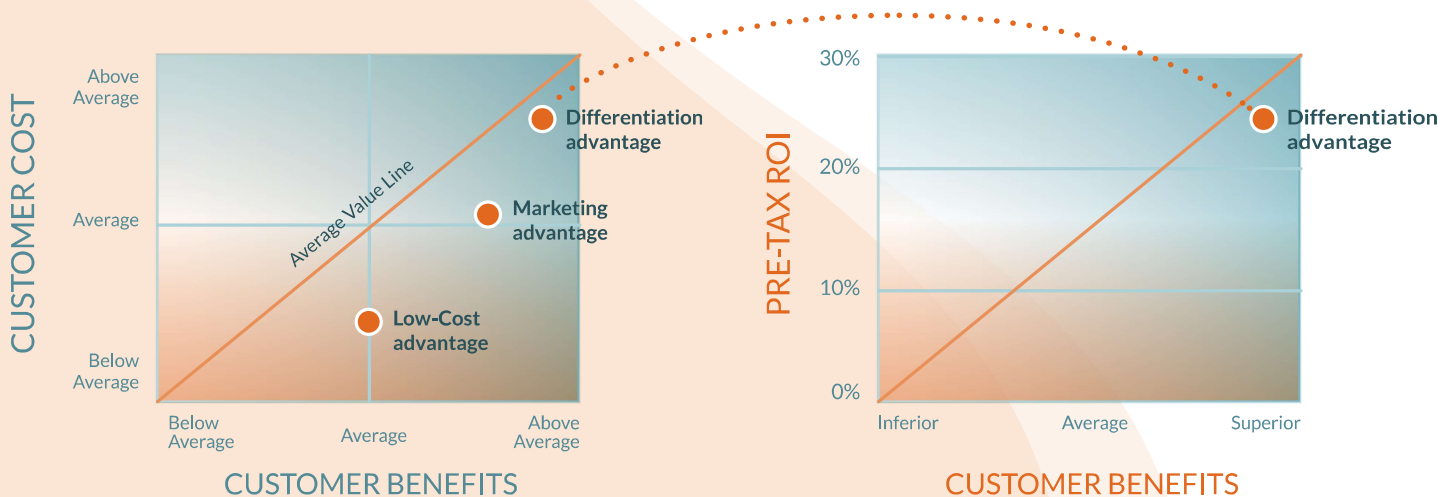
## 6. COMPETITIVE ANALYSIS & SOURCES OF ADVANTAGE

Understanding the forces shaping Silver Star's competitive position offers important insights and clues that can be used to grow market share at the expense of competitors, or at least to set stretch goals in pursuit of a market leader.

Silver Star has limited options when it comes to selecting its source of advantage. Cutting costs undercuts a destination's value proposition and more often erodes long term profitability. Outspending the competition on marketing isn't an option either given current budgets and the business climate, not to mention that the same digital marketing tools are available to anyone. Focusing on being different, service quality and Silver Star's reputation will deliver not only the strongest advantage, but also its largest return-on-investment. It's also not easily duplicated by competitors.



### Competitive Forces that Shape Tourism's Competitive Position and Profitability



Taking a market-based management approach to analyzing the destination's competition, the project looked for product, service and reputation-based opportunities that present potential sources of advantage. Competitive intelligence gathering also measured how intensely Silver Star competes with other resort destinations in BC. See **Appendix I** for full table and competitive analysis.

#### Destination Silver Star Competitive Set

- Sun Peaks Resort
- Revelstoke Mountain Resort
- Big White Ski Resort
- Whistler Blackcomb Ski Resort



An immediate conclusion to draw is that the competitive field is wide open for any resort willing to reposition itself in the marketplace around a brand promise and pillars that emphasize emotional and experiential benefits, not features and benefits which have been proven inferior motivators of human behaviour.<sup>3</sup>

## Competitor Price-Performance Analysis

Visitors don't make their travel purchase decisions based on price alone. Far from it. The experience and other benefits, which are often difficult to quantify, create value too. An analysis of the interactions between the price and performance of experiences relative to those of your competitors can help destinations lean into new areas of improvement.

Given the opportunity to grow summer business, a relative price-performance analysis compared Silver Star with summer competitors Sun Peaks, Big White, Revelstoke Mountain Resort, and Whistler in the following categories:

- Mountain bike parks
- A selection of 4- and 3-star hotels
- A selection of upscale and everyday restaurants
- Tours, experience, and attractions

See **Appendix I** for detailed price-performance value mapping that supports key findings.

### Key Findings

- A good number of Silver Star accommodations, restaurants and experiences provide strong experiential value, meaning visitors give it high marks and pay a premium.
- As service standards get back up to par and businesses shake off the COVID hangover, performance ratings will climb for others and so will revenue.
- Team building, energetic guest service training and yield-management will help move more accommodations, restaurants and activities back into more profitable territory.
- Looking at the full competitive set, Silver Star doesn't compete in the value for money market segment. Instead, it has a solid foothold in the coveted experiential arena where guests are all too willing to pay a premium for the wonderful experience. This arena only sees Silver Star punching above its weight class to square off against the Whistler Blackcomb experience.
- Revelstoke Mountain Resort remains an intense competitor, especially with respect to the breadth and depth of its offering, but the price-performance of key assets shows the destination trailing or at least, failing to capitalize on its strengths.

<sup>3</sup> Source: *Thinking, Fast and Slow*, Daniel Kahneman, Farrar, Straus and Giroux, 2011.



- In what should be of great concern to all resort competitors, mountain biking enthusiasts ready to send it, and hikers all laced-up to hit the trails found BC bike parks and on-mountain trails to provide average value.
- With sizable investments being made by all competitors in building out trails, resort amenities to service and celebrate riding culture, and campgrounds to meet a wider range of preferences, resorts should be investing as well in the user experience and finding ways to earn higher performance ratings, to start.
- Despite lessons learned from US resorts that cash-in on making world-class hiking trails accessible, Canadian resorts continue to lag behind in taking advantage of the increased wave of interest in point-to-point, loops, epic climbs and hut-to-hut backcountry hikes. This is in spite of BC and Alberta being recognized as offering some of the greatest wilderness hiking in the world.

## Product Breadth & Depth

Based on a broad set of resort product categories, an analysis of resort product breadth and depth was undertaken for both the summer and winter for the competitive sets detailed above. See **Appendix I** for detailed findings and additional context.

### *Key Findings*

- The Product Breadth and Depth Index shows Sun Peaks (+20%) and Whistler (+35%) ahead of Silver Star in winter with Big White slightly behind and Revelstoke trailing.
- Summer shows Sun Peaks and Revelstoke with 50% more experiences and Whistler nearly double Silver Star's offering. Only Big White does worse.
- Revelstoke Mountain Resort and the town itself position themselves together in the marketplace, and thus, benefit from a stronger competition positioning.
- A premium hotel with outdoor heated pool and destination spa in the Thompson Okanagan could provide a significant advantage to investors and their supporting destination.
- The competitive field is wide open for any resort willing to reposition itself in the marketplace around a brand promise and pillars that emphasize emotional and experiential benefits, not features and benefits which have been proven inferior motivators of human behaviour.<sup>4</sup>
- Partner with Sovereign Lake Nordic Club to market programs and facilities more strongly to Silver Star Resort overnight guests.

<sup>4</sup> Kahneman, 2011

# 7. DESTINATION DEVELOPMENT FOCUS

Together, the strategic lenses, principles, and insights presented so far tell a rich story. Based on this, the following destination development focus and supporting key initiatives will continuously improve community well-being at Silver Star.

A total of five areas of focus have been put forward:

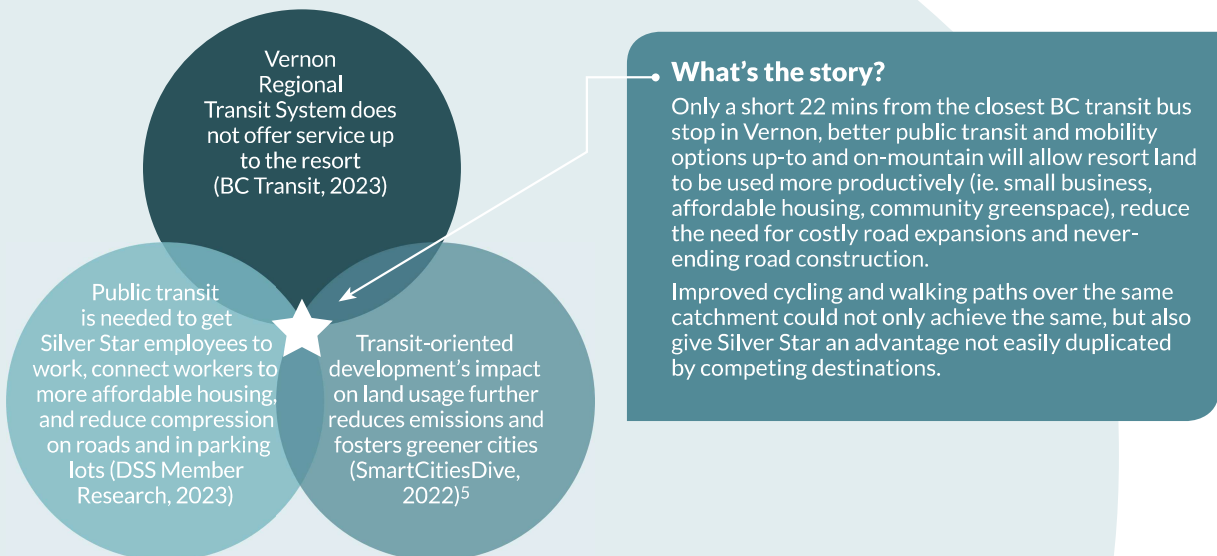
1. Insist on Transit-Oriented Development
2. Build a More Redistributive, Resilient Local Economy
3. Make Silver Star More Competitive
4. Fire-Up Economic Reconciliation
5. Empower People to Achieve

The main strategy and key initiatives for each are summarized below. Suggested milestones and estimated costs for each key initiative are detailed in supporting tables to help set short-, medium-, and longer-term planning priorities.

## 1. Insist on Transit-Oriented Development

Only a short 22 mins from the closest BC transit bus stop in Vernon, better public transit and mobility options up-to and on-mountain will allow resort land to be used more productively (ie. small business, affordable housing, community greenspace), reduce the need for costly road expansions and never-ending road construction. It will also make the resort more affordable for employees helping improve retention and workplace commitment.

### Strategic Insights



5 To reduce transportation emissions, make it realistic for people to ditch cars, David Scorey, SmartCitiesDive, March 2022

## Strategy

Increase accessible public transportation to resort by looking at co-operative service models that get staff and visitors up and down the mountain so that vehicle-based carbon emissions are reduced.

### Overview of Key Initiatives

- Innovative transit partnerships with BC Transit, business, and social enterprises
- Smart City design principles that build the on-resort pedestrian economy
- Improved cycling and footpaths up to and around resort community
- Better signage and wayfinding



**Table 2** Insist on Transit-Oriented Development

<b>Insist on Transit-Oriented Development</b> Increase accessible public transportation to resort by looking at co-operative service models that get staff and visitors up and down mountain so that vehicle-based carbon emissions are reduced.		
Key Initiative	Completion	Cost
1. Incubate new bus service using social enterprise model in partnership with other benefiting stakeholders like Sovereign Lake Nordic Club.	2026	\$30K Feasibility study and business plan
2. Pursue private-public partnership options to launch BC Transit accessible seasonal service beyond Pleasant Valley through the Silver Star Foothills, Kedleston and SilverStar Mountain Resort.	2025	TBC after exploratory talks with BC Transit
3. Develop, expand and improve cycling and footpath network up to and on mountain.	2028	\$50K Feasibility study and mapping
4. Adopt smart city design principles that require all resort master plans to demonstrate transit-oriented development that reduces emissions, nurtures a pedestrian economy and allows local land to be used more productively. <sup>6</sup>	2024	\$10K Policy development
5. Work with POWDR, DSS Members, and Silver Star Property Owners Association to develop, design and build improved signage and wayfinding.	2025	

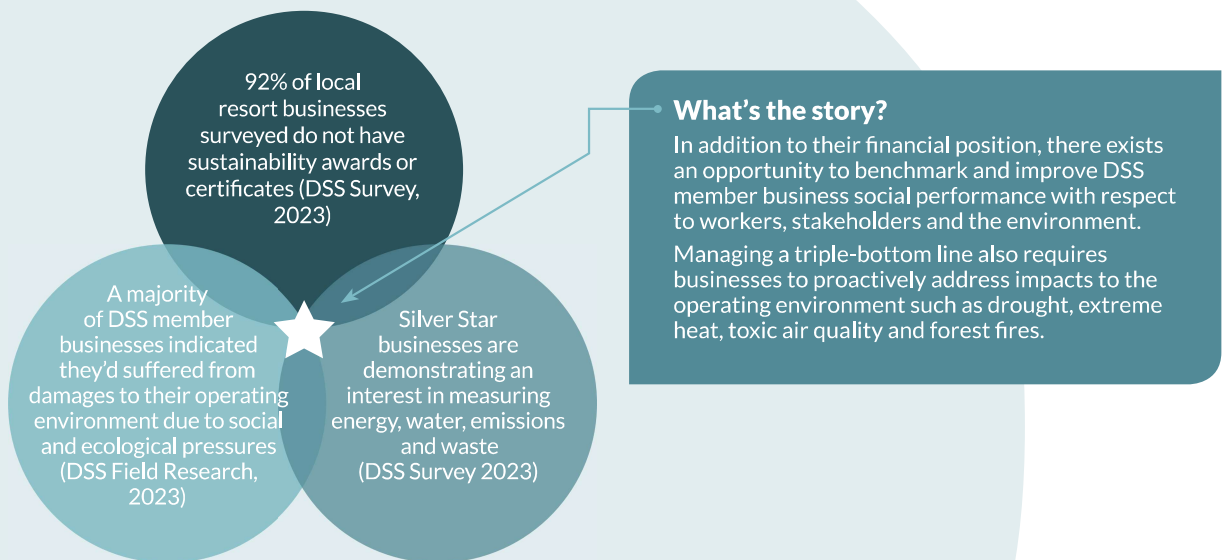
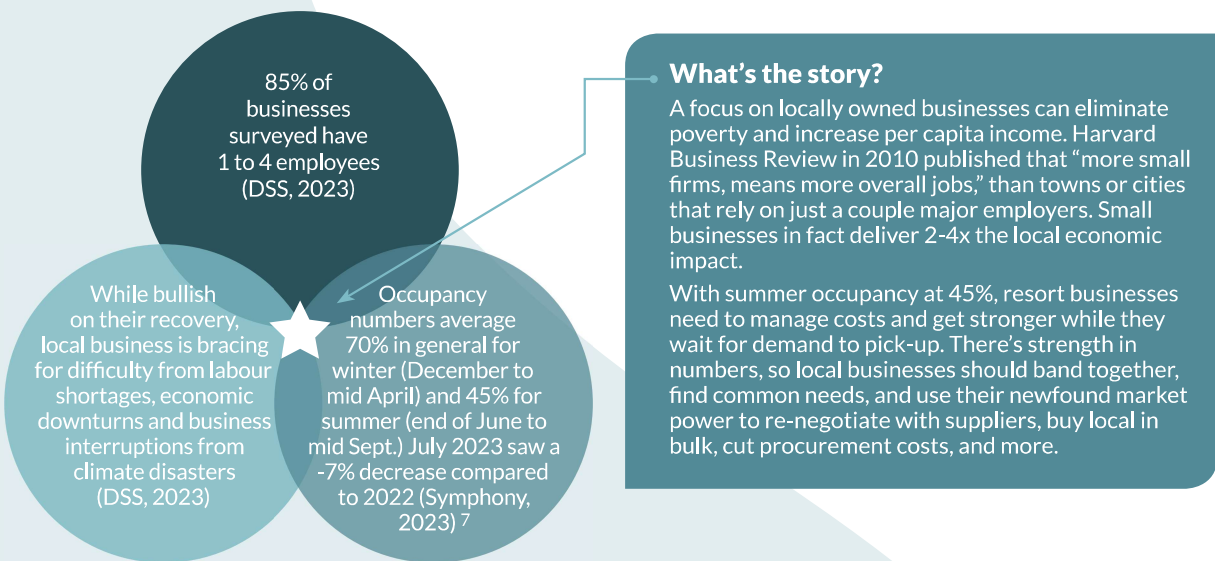
<sup>6</sup> Smartcitiesdive, 2022

## 2. Build a More Redistributive, Resilient Local Economy

A focus on locally owned businesses can eliminate poverty and increase per capita income. Harvard Business Review in 2010 published that “more small firms, means more overall jobs,” than towns or cities that rely on just a couple major employers. Small businesses in fact deliver 2-4x the local economic impact.

With summer occupancy at 45%, resort businesses need to manage costs and get stronger while they wait for demand to pick-up. There’s strength in numbers, so local businesses should band together, find common needs, and use their newfound market power to re-negotiate with suppliers, buy local in bulk, cut procurement costs, and more.

### Strategic Insights



7 Silver Star Visitor Highlights 2023, Symphony Tourism Services and BC Regional Tourism Secretariat, September 2023.

## Strategy

Improve profitability of locally owned businesses by bringing together Silver Star operators to pursue scale efficiencies to ensure resort businesses continue to generate outsized local impacts.

### Overview of Key Initiatives

- Seek out opportunities to cut operating costs for local businesses and offer profitability training
- Develop programs to better encourage and measure positive social impact
- Provide support for recruitment of key talent and staff
- Partner with Tourism Vernon to build a Buy Local program
- Plan for business interruption, crisis communications, and response planning

**Table 3** Build a More Redistributive, Resilient Local Economy

<b>Build a More Redistributive, Resilient Local Economy</b> Improve profitability of locally owned businesses by bringing together Silver Star operators to pursue scale efficiencies to ensure resort businesses continue to generate outsized local impacts.		
Key Initiative	Completion	Cost
1. Engage private-sector business facilitator to work on a cash and performance basis to uncover and leverage opportunities to cut local business operating costs.	2024	\$10K Business plan and startup
2. Adopt and implement a program that increases the number of businesses who are measuring, benchmarking and improving their social performance with respect to workers, stakeholders, and the environment.	2024	
3. Assist local member businesses with winter and summer recruitment efforts.	Ongoing	\$30K Collateral, events, travel
4. Partner with Tourism Vernon and private-sector to build and manage a fee for service Buy Local program that generates local sales, especially during need periods.	2024	\$30K Feasibility study and business plan
5. Build-up a contingency fund designed to help DSS member businesses weather serious and immediate business interruptions.	Ongoing	Program development
6. Initiate crisis communications and response planning with Tourism Vernon and Thompson Okanagan Tourism Association (TOTA) to ensure effective coordination between overseeing agencies so that visitors receive appropriate messaging and business interruptions are mitigated.	2024	\$30K Planning and training

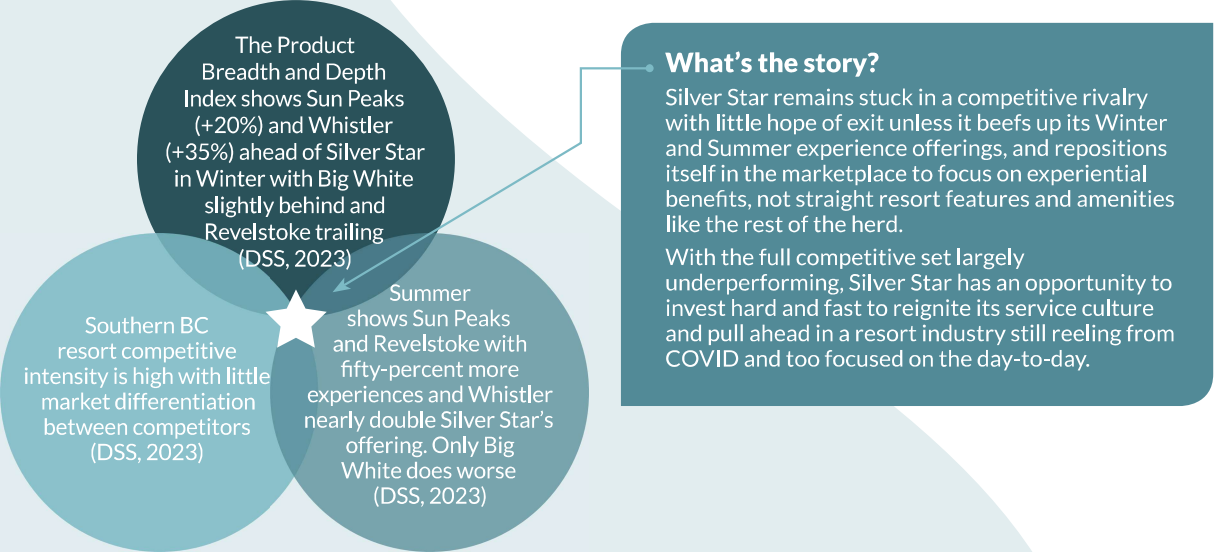
7. Provide a Yield Management and Pricing Analysis and training to local DSS business members so they can improve their profitability while making room for future growth.	2024	\$40K Analysis and training
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### 3. Make Silver Star More Competitive

Silver Star remains stuck in a competitive rivalry with little hope of exit unless it beefs up its Winter and Summer experience offerings, and repositions itself in the marketplace to focus on experiential benefits, not straight resort features and amenities like the rest of the herd.

With the full competitive set largely underperforming, Silver Star has an opportunity to invest hard and fast to reignite its service culture and pull ahead in a resort industry still reeling from COVID and too focused on the day-to-day.

#### Strategic Insights



#### Strategy

Strengthen destination position and marketing effort by satisfying market-demand for an enhanced breadth and depth of on-mountain experiences so that Silver Star grows market share of visitors.

#### Overview of Key Initiatives

- Mentor, coach, and encourage the next generation of tourism related-business owners
- Identify opportunities and future needs with a resort-wide Product Analysis
- Work with Silver Star Resort on small tour operator licenses and on-mountain hiking infrastructure
- Drive overnight stays with conferences and events
- Launch a North Thompson Okanagan Arts and Culture program
- Construction and operation of a new campground, and village enhancements

**Table 4** Make Silver Star More Competitive

<b>Make Silver Star More Competitive</b> Strengthen destination position and marketing effort by satisfying market-demand for an enhanced breadth and depth of on-mountain experiences so that Silver Star grows market share of visitors.		
Key Initiative	Completion	Cost
1. Partner with a local business accelerator and Tourism Vernon to provide mentoring, coaching and startup support to inspire residents and smart young adults to start a new tourism-related business, and to push up the survival rate of these start-ups.	2026	\$50K Program development and Yr1 start
2. Develop a Resort-wide Product Analysis to identify the market forces shaping future demand for resort experiences so that DSS members and new entrants can identify opportunities, develop stronger business plans, and successfully apply for capital.	2024	\$20K Product analysis and recommendations
3. Motivate POWDR to explore potential of a fee for service business model that grants small tour operator licenses within its controlled recreation area that can provide the resort with a differentiation advantage.	2024	
4. Explore social innovations and enterprise models that could deliver needed on-mountain experiences while providing a source of employment and revenue for local entrepreneurs or societies.	2025	\$10K Feasibility study and recommendations
5. Empower passionate locals, societies, anchor institutions, and expert producers with tools, systems, and seed capital so they can develop, manage and deliver DSS brand aligned conferences and events that drive overnight stays and local spending during need periods.	2024	\$100K Web portal, tools and seed capital
6. Work with the Arts Council of the North Okanagan and POWDR to develop and launch a North Thompson Okanagan Arts and Culture program that positions Silver Star and Vernon offering together, and invites local artists to animate resort assets like Mainstreet, main resort entrance/exit, and trailheads.	2025	\$100K RFEOI and inaugural artist commission
7. Work with POWDR to find funding to further develop on-mountain hiking infrastructure to increase variety and minimize user conflicts.	2025	TBC
8. Enhance Silver Star summer and shoulder season program with construction and operation of a new campground that includes dedicated sites with RV hookup, and village enhancements including beautifications, childrens play area, accessible trail connecting to mountain village and wayfinding signage.	Camping opens late 2024 or spring 2025	\$775K project value

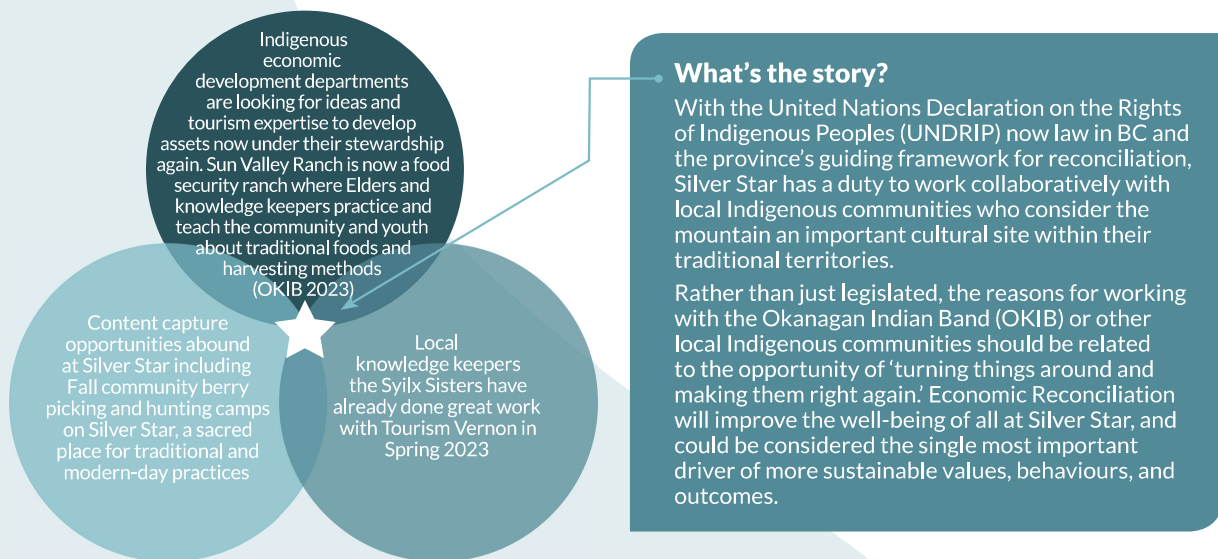


## 4. Fire-Up Economic Reconciliation

With the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) now law in BC and the province's guiding framework for reconciliation, Silver Star has a duty to work collaboratively with local Indigenous communities who consider the mountain an important cultural site within their traditional territories.

Rather than just legislated, the reasons for working with local Indigenous communities should be related to what Coastal First Nations refer to as: 'turning things around and making them right again.' Economic Reconciliation will improve the well-being of all at Silver Star, and could be considered the single most important driver of more sustainable values, behaviours, and outcomes.

### Strategic Insights



### Strategy

Share decision-making power with local Indigenous communities to create win-win solutions that actively increase local Indigenous capacity and improve Indigenous community well-being.

### Overview of Key Initiatives

- Provide resources to mentor, coach, and encourage Indigenous community members interested in starting a business
- Leverage relationship and expertise of ITBC Regional Specialist to identify partnership opportunities
- Collaborate with local Indigenous economic development departments
- Open channels of communication with local Indigenous communities

**Table 5** Fire-Up Economic Reconciliation

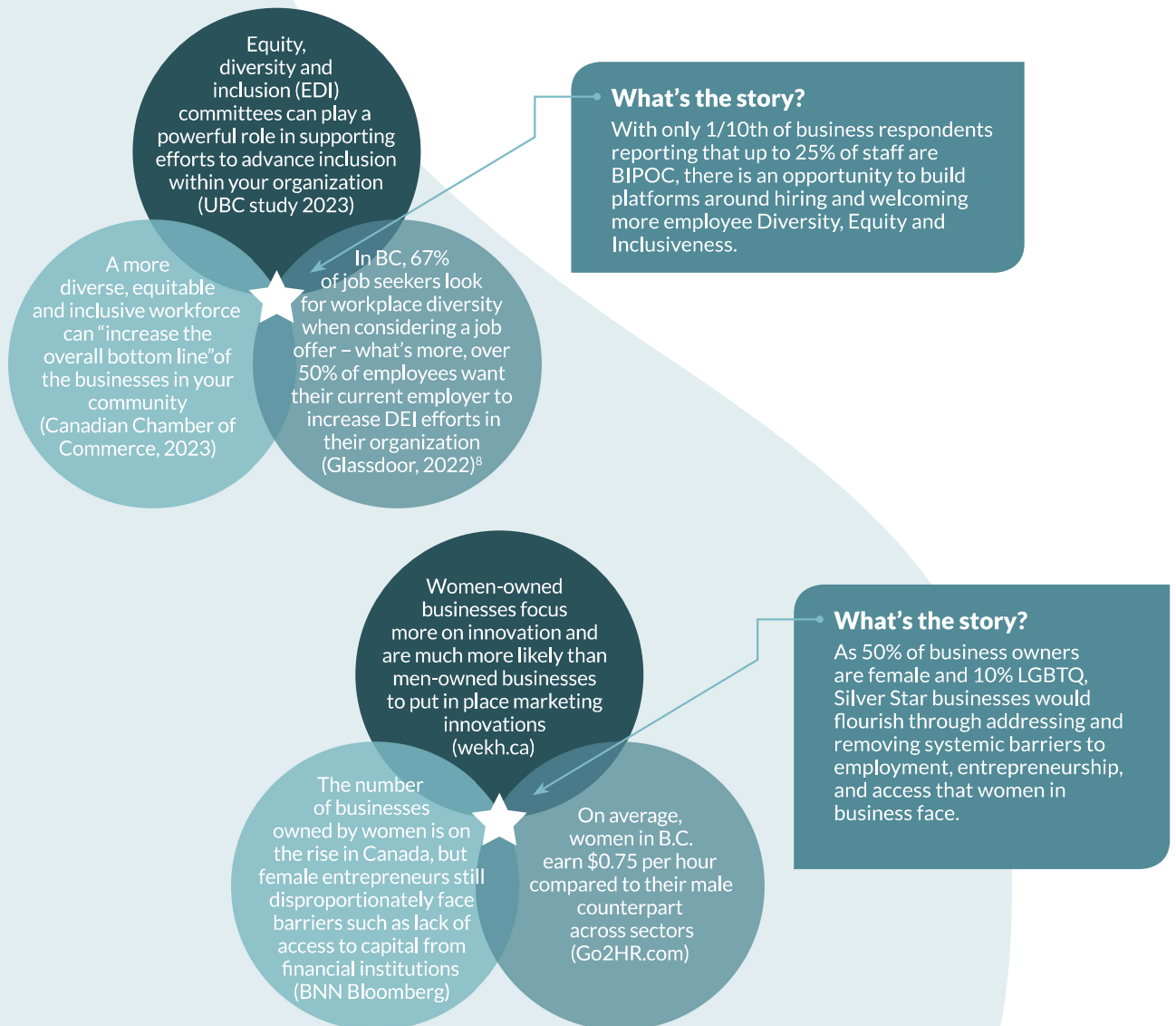
<b>Fire-up Economic Reconciliation</b> Share decision-making power with local Indigenous communities to create win-win solutions that actively increase local Indigenous capacity and improve Indigenous community well-being.		
Key Initiative	Completion	Cost
1. Provide access to an online Business Accelerator that will provide mentoring, coaching and knowledge to Indigenous community members interested in starting a business.	Annually	\$5K Annual subscription
2. Leverage Indigenous Tourism BC regional specialist expertise to connect local Indigenous communities with tourism programs and knowledge that prepares them to benefit from Silver Star partnership opportunities	Ongoing	
3. Work with local Indigenous economic development departments and corporations to help them identify tourism assets and make plans to develop them.	Ongoing	\$30K Annual dollar matching fund for business development
4. Provide an Indigenous designed and branded social retail space for local Indigenous artisans.	2026	\$10K Business plan
5. Work with local Indigenous communities to establish regular communications sharing protocols and processes so that DSS members, Silver Star visitors, AND Indigenous community members can receive communications of interest.	2025	
6. Work with local Indigenous communities to recruit and establish an Indigenous advisory group whose participants will be paid an honorarium to participate in semi-annual development, planning and oversight of projects designed to advance Silver Star's commitment to Economic Reconciliation and sustainability through Indigenous world views, teachings and practices.	2024	\$20K Yr1 development and management

## 5. Empower People to Achieve

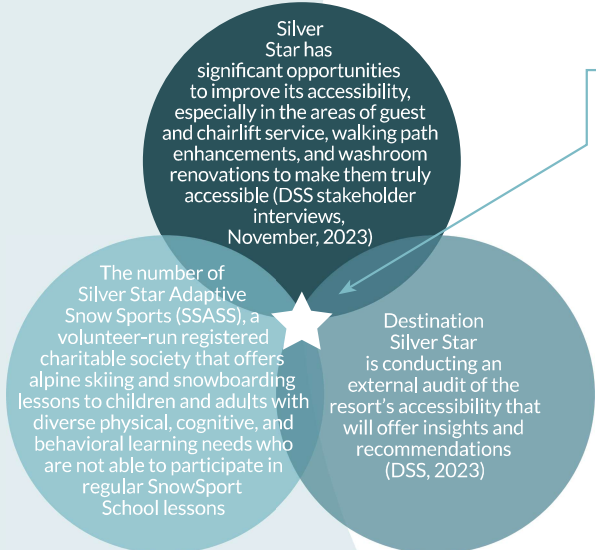
Managing common resources requires strong and varied institutions that can redistribute the flow of social, environmental, and economic benefits. Destination Silver Star and SilverStar Mountain Resort LLP can work to share power and benefits directly with the community who can develop their own solutions and manifest outcomes that improve everyone’s quality of life at the resort.

Active attention to diversity and inclusivity provides more equal access to support and opportunities regardless of people’s gender, sexual orientation, health and mental / physical ability. In addition to addressing inequality and barriers to employment, inclusivity also means “meeting people where they are at.” Not everyone can (or even wants) to work a 9-5 job. Destination Silver Star’s culture and physical assets benefit tremendously from a legion of informal networks that do important unpaid work. Volunteers are an essential part of Silver Star’s everyday mountain culture.

### Strategic Insights



<sup>8</sup> Sources: Canadian Chamber of Commerce, Website, September 2023 | Glassdoor DEI Report, Website, July 2022 | UBC Study, Guide download, June 2023 | Women Entrepreneurship Knowledge Hub, The state of women’s entrepreneurship in Canada 2023, wekh.ca, June 2023 | BNN Bloomberg Study, September 2023 | Go2HR study, October 2022



**What's the story?**

BC is home to leaders in the field of building accessibility. For example, the Rick Hansen Foundation offers self-audit tools, training and certification. The Silver Star community includes passionate locals with disabilities who are active mountain users who depend on the proper accessibility infrastructure and adaptive sports programs to fully share in the cultural, health, and personal connection benefits that living and playing at Silver Star offers.

The Village itself is centralized with diverse accessibility infrastructure elements that are waiting for the right improvements and expansions. The greatest strength and asset lies in the many connectors like the Silver Star Adaptive Snow Sports society and local accessibility champions who regularly volunteer their energy and expertise.

Empowering local accessibility champions to sometimes take the lead and sometimes advise, will prove the magic formula for making Silver Star a destination that ignites everyone's potential.

**Strategy**

Nurture a resort culture that fosters creativity, fresh perspectives, and understanding by implementing and encouraging DSS members to enforce policies and programs designed to empower BIPOC, LGBTQ2S+, retirees, and women to make the DSS vision a reality.

**Overview of Key Initiatives**

- Partner with WORTH Association to elevate equity
- Hire an employment and DEI policy expert to audit the destination and develop a broad resort-wide policy
- Gather input from micro-entrepreneurs and part-time artisans
- Develop and implement a pay transparency plan
- Follow up on 2023 accessibility audit and partner with Silver Star Adaptive Snow Sports to help fund program and infrastructure improvements



**Table 6 Empower People to Achieve**

<b>Empower People to Achieve</b> Nurture a resort culture that fosters creativity, fresh perspectives, and understanding by implementing and encouraging DSS members to enforce policies and programs designed to empower BIPOC, LGBTQ2S+, retirees, and women to make the DSS vision a reality.		
Key Initiative	Completion	Cost
1. Make the Silver Star 'Community' a destination brand pillar and support the informal networks that provide community service and enhance the value of tourism-related assets.	2025	\$10K Event promotion F&B, management
2. Use the WORTH Association as a strong resource to elevate Silver Star's equity platform. Offer to host a WORTH conference or event as a major sponsor to elevate the partnership.	2025	\$20K Consulting fees and member engagement
3. Hire an employment and DEI policy expert to audit the destination and develop a broad resort-wide policy that can be adapted and tailored to work with individual sectors within the Silver Star Resort platform. This policy and procedure document would consider the Accessible British Columbia Act.	2026	\$20K Program development and communications support
4. Launch a social procurement program that sources needed business inputs from micro-entrepreneurs and part-time artisans.	2025	
5. Develop and implement a pay transparency plan as a proactive measure to the Pay Equity Act.	TBC	TBC
6. Follow-up on 2023 accessibility audit with implementation plan addressing issues like compassionate, appropriate guest service, walking path clearing and enhancements (ie. better traction, signage, signs requesting others yield to people with disabilities), capital plan for handicap washroom updates, trained lift staff able to deliver priority lift service, etc.	TBC	TBC
7. Create a short and long term implementation plan for accessibility to address high impact-low cost implementations to be completed in the short term. (Ex. place 3 or 4 guest-use wheelchairs at cafe's and/or store entrances so a person in a sit-ski can enter an indoor area without being physically carried by another person.)	TBC	TBC
8. Partner with Silver Star Adaptive Snow Sports to help fund program and infrastructure improvements.	TBC	TBC

# Appendix

## Appendix A. Detailed SWOT Analysis

Research and engagement results were triangulated to look at what story the data has to tell. Using a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) as a framework, the main driving insights were:

**Strengths:** A vibrant local economy supported by local residents; quality core offering in both seasons; small town feel that reflects a strong sense of community and unique character of Silver Star.

**Weaknesses:** Seasonality and lack of public transit both pose a challenge, as well as weak collaboration amongst local businesses and market conditions leaving some business owners unable to make a living.

**Opportunities:** Underutilized assets and experience offerings that broaden destination appeal; upsides that come with a premium brand hotel; service culture improvements; transportation and signage enhancements; affordable housing for local staff; and mixed-use master development plans that support a pedestrian economy and housing options for a wider range of guests and residents.

**Threats:** Labour shortages along with environmental emergencies, economic uncertainty, and intense competition are straining local staff and business owners.

### DSS Destination Development SWOT Analysis



## Destination Strengths

**Local Economy is Strong:** Personal use owners and residents support their local economy, making strong use of seasonal recreational opportunities, dining and shopping locally, and supporting events. There's a strong belief that tourism benefits local business.

**Natural Environment:** Silver Star is well regarded for its natural environment. Namely, its unique location in the Okanagan region of the Southern Interior of British Columbia gives way to a plethora of natural amenities with plenty of natural fresh powder snow in the winter and ideal climate in the summer.

**Quality Core Offerings:** Silver Star has “something for everyone”. In the winter, the picturesque mountains set the stage for world class Nordic and Alpine skiing, tubing, snowshoeing, and skating; while, in the summer, the resort transforms into a utopia for hiking as well as mountain and cross-country biking. Off the hills, the local village is home to a variety of year-round stores and restaurants as well as an art gallery and museum.

**Small Town Feel:** Locals love Silver Star for its small-town feel, describing it as a “hidden gem”. The town is walkable in the summer and ski-in, ski-out in the winter, with no chain hotels or restaurants and a focus on unique mom and pop shops. Silver Star offers a quaint, inviting, calm, and relaxed environment with uncrowded surroundings and shorter lines. This while being 20 minutes from Vernon and equal distance as competitors from an international airport.

**Sense of Community:** Besides a string of usual benefits, DSS members feel that tourism builds community, and they have no problem listing allies and partners that can help, OKIB being among them. And they know who their Connectors are, listing a deep bench of community champions who have a talent for getting things done and bringing new ideas to life.

**Family Friendly Atmosphere:** For the family minded market segment, Silver Star is not overly technical, making it accessible to a variety of skill levels. It is emphasized that this is not a party destination but rather a relaxed and quiet place where families can enjoy a peaceful and safe vacation.

**Mindful Resort Management:** The resort management, under the ownership of POWDR, has made significant improvements. The community feels more connected to the resort, with the General Manager, and his team, actively engaging with the community. The resort has also been praised for its professional staff training as well as its grooming practices.

**Unique Character:** Silver Star is known for its unique character and is often described as “magical” by visitors. The architecture and village atmosphere create an exciting and enchanting experience. The village features homes on the Knoll, colorful buildings, and a Nordic vibe with gnomes scattered throughout the village and trails.

## Destination Weaknesses

**Seasonality:** Silver Star visitor volumes oscillate between high winter season and low summer with 'mud season' limiting shoulder season opportunities for leisure spending. Unless capital is patient, the lows make it hard for businesses needing short-term returns to invest in the wider summer offering necessary to drive business.

**Weak B2B Collaboration:** Silver Star businesses have faith in the business associations they belong to when it comes to helping them scale up, cut costs and boost their impact. Despite proven benefits, this spirit of collaboration seemingly wavers when it comes to collaborating directly amongst local businesses.

**Recovery Leaving Some Businesses Behind:** Seemingly at odds with the bullish business outlook, some businesses indicated worry about business closures and owners unable to make a sustainable living.

**Better Transportation and Signage Needed:** Silver Star suffers from a lack of transit options, poor road quality in winter, and heavy reliance on personal vehicles causing parking lot compression. A more comprehensive, consistent signage program is needed for wayfinding AND promoting responsible behaviours (ie. no littering). Safer cycling infrastructure up-to and on-mountain is a need and opportunity.

**Make it a More Livable Silver Star:** The current housing mix favours large, executive style detached homes. Making the resort a more livable community requires Mixed Use Development, Missing Middle Housing, and Affordable Housing for locals and staff.

**Proper Waste Management:** The destination needs to improve solid waste and recycling infrastructure. Better recycling facilities for tourists and residents are required to address garbage and wildlife problems associated with improper waste disposal.

## Destination Opportunities

**Build Up Summer:** Although Silver Star is home to a diverse set of quality offerings, it continues to suffer from seasonality challenges. With winter well-handled save some late season need periods, destination players should maximize potential during the summer months and shoulder seasons (as much as the mud allows). Consideration should be given to the provision of savings for locals in the off-season, the expansion of events and programming in the summer months, as well as the addition of summer activities and amenities.

**Main Street Improvements:** Silver Star has an opportunity to enhance the appeal of the Main Street, transforming it from merely a highway through the village into a vibrant destination in itself. This can be achieved by organizing events such as small concerts, wine festivals, and other community gatherings as well as expanding nightlife options, providing visitors with



compelling reasons to stay and explore. Collaborating with local artisans and merchants could further enrich the Main Street ambiance and draw a diverse range of visitors.

**Open Doors to a Premium Hotel:** A premium hotel with outdoor heated pool and destination spa in the Thompson Okanagan could provide a significant advantage to investors and their supporting destination.

**Public Transit:** Improved transit is crucial for guest convenience and staff mobility. Offering regular transit services and safe cycling routes to and from Vernon can alleviate parking congestion and enhance the overall guest experience. It's essential not to move all parking away from the resort, as convenient access was noted as vital for visitors, especially families with small children.

**Staff Need Affordable Housing:** To address staffing challenges, Destination Silver Star should explore social enterprise models and partnerships to create more staff housing through new developments and repurposing underutilized assets. Providing affordable and convenient housing options for employees can help attract and retain a dedicated workforce, ensuring the resort's smooth operation and high-quality service.

**Improve Customer Value:** A good number of Silver Star accommodations, restaurants and experiences provide strong experiential value, meaning visitors give it high marks and pay a premium. As service standards get back up to par and businesses shake off the COVID hangover, performance ratings will climb for others and so will revenue. Team building, energetic guest service training and yield-management will help move more accommodations, restaurants and activities back into more profitable territory.

**Make Sustainability a Coordinated Focus:** While some businesses have taken charge, most businesses do not have sustainability awards or certifications. SilverStar Mountain Resort LLP has a commitment to protecting the environment and supporting its community through the Play Forever initiative, while nearly 60% of businesses surveyed give time, money, in-kind value to local groups and causes. A few other businesses measure consumption, waste and emissions. A coordinated sustainability framework would harness the energies of an already tight community and focus them on achieving outcomes that would drive the bottom line, improve resilience and serve community well-being.

## Destination Threats

**Labour Shortages:** Due to labor shortages within the tourism industry, Silver Star is experiencing significant staffing challenges, specifically with filling part-time positions.

**Environmental Emergencies:** Silver Star is facing threats from environmental emergencies. Reduced snowfall affects on-mountain conditions and causes safety hazards on mountain bike trails. Recent interface fires are impacting air quality, forcing cancellations, and cementing a destination brand liability (Fire Season) that will be difficult to get out from under.

**Deteriorating Mental Health:** Stress, depression, and anxiety amongst staff, business managers and owners is high. Prolonged states of emergency, continued climate change impacts and economic uncertainty have emotional and psychological impacts that require concerted investments in mental health services as an essential team building component.

**Economic Uncertainty:** While tourist expenditures and international arrivals may be set to return to their long term growth trend by 2026, broader measures of economic output are showing slow growth amongst western countries. Higher interest rates, and inflation will continue to put downward pressure on consumer spending and net margins.

**Competition Intense:** Just like others, Silver Star focuses heavily on the family-friendly market segment, highlighting more or less the same features and benefits. The competitive race is wide open for any resort willing to reposition itself in the marketplace around a brand promise and pillars that emphasize emotional and experiential benefits, key motivators for GenZ and Millennials. This about-face would ride the wave of interest in more authentically local resorts.

## Appendix B. Strategic Principles for Destination Development

Modern destination development strategy, grounded in the principles and ideas of Community Economic Development (CED), offers destination managers and tourism professionals new solutions that fall perfectly in line with the call for greater community leadership, and multiple bottom-line solutions that improve local well-being. This methodology is market-driven but also applies local economy solutions, knowing that a diversity of small and community-powered projects can also drive or support domestic and international visitor arrivals.

Using these principles and the new tools and solutions they provide, this report is able to present deeper strategic insights and use these, to make stronger recommendations. Key principles applied in the context of this plan are below.

### *Strategic Principles*

**Aim to Thrive.** Don't let growth become a goal in itself. Thrive, and grow. Embrace the 21st century goal of community well-being. Meet the needs of your local destination within the means of the planet.

**Nurture Human Nature.** Promote diversity, participation, collaboration and reciprocity. Take a livelihoods focus that considers a range of tourism-related opportunities from formal to informal. Empower community 'connectors' and informal networks that can lead and get results.

**Favour Local Economy Solutions.** Modern place-making requires local economy solutions that foster self-reliance, resilience and connectors that can improve everyone's operations at scale. A focus on locally owned businesses can eliminate poverty and increase per capita income. A diversity of small economic development projects can be deeper and longer lasting for the local economy.

**Be Distributive and Regenerative by Design.** Thriving economies are diverse and favour distribution. They are also regenerative, choosing to be circular and to put back what they take.

## Appendix C. Market Performance

Resort pace for winter 2024 is strong with latest stats showing a 70-75% occupancy average from mid-December to mid-March as of mid-November 2023. There is a need to grow March visitation, and to find more ways to proactively grow summer which likely comes from group business development.

### Market Trends

While many trends impact tourism supply and demand, below are some of the main market trends that play to Silver Star's strengths and market position.

**Gen Z:** Very soon, Millennials and Gen Z are expected to make up 75% of all consumers and travellers by 2025. Retailers and brands are still trying to figure out how to appeal to Gen Z, the generation that currently spans the ages of 7 to 22 and has a spending power of \$143 billion.<sup>9</sup> Ninety-three percent of parents say their Gen Z children influence their household spending. Another 70 percent of parents ask their Gen Z kids for advice before making purchase decisions.<sup>10</sup>

**Hiking:** Among the most enduring recent health and wellness trends, hiking remains among the top mindfulness and stress reduction activities, especially among luxury consumers. Epic scenery, rare topography and transformational point-to-point hikes drive fame and fortune for destinations lucky enough to have the right mix in their backyards.

**True Local:** COVID's impact on the North American mindset has only strengthened the focus on what is truly important to personal and community well-being. This awakening is powering a marked increase in demand for destinations and experiences backed by communities that value the same things. Experiencing authentic local resort culture was already a top need for many traveller segments, and now, its importance as a decision driver has hit the next level. Surfacing and celebrating local culture at every consumer touchpoint, as well as a strong 'buy local' campaigns have never been more important.

**Economic Reconciliation:** A holistic tourism strategy and plan would not be complete without Economic Reconciliation in mind that's focused on intentful inclusion of First Nations partnerships. Concrete actions that generate measurable outcomes for neighbouring Indigenous or entrepreneur-owned tourism businesses should be taken.

**Regenerative (and Generous) Resort Design:** Vail Ski Resort has committed to ZERO emissions, water and natural impact by 2030. The new Six Senses in Norway will be the world's first energy-positive hotel. A 94-room hotel, this world-first is set to open in 2024, and will be completely off-grid and carbon neutral. Net zero and positive design principles are expected to become standard and key selling points.

<sup>9</sup> Gen Zers, Business Insider, Dominic-Madori Davis, January 2020

<sup>10</sup> What Makes Them Buy: Gen Z Buyer Behaviors (Updated 2021), The Shelf, December 2020

## Appendix D. Research and Engagement

Destination development should always bring together different stakeholders to achieve the common goal of a more sustainable destination. More than just market-driven, it respects community identity and works to conserve and protect local assets that makes the resort livable and worth visiting. In this effort, well-rounded insights are required so destinations can plan for the future and fully consider the social, economic, cultural and environmental risks and opportunities.

For this DSS work the main research and engagement objectives were:

- Identify source(s) of 'sustained' competitive advantage that will see the resort community thrive and grow
- Underline destination assets, strengths and opportunities that should be leveraged or improved on
- Uncover local economy tourism solutions that improve resort community well-being

The process required the active participation of diverse stakeholders. In the context of the project, the DSS stakeholder population was defined as:

- Destination Silver Star BOD and Engagement Committee
- Tourism-related resort business owners
- Resort property owners association
- DMO network partners
- Local government (administration and elected)
- Indigenous leaders and partners
- Community organizations and clubs
- Non-commercial recreation clubs
- Sector associations
- Community Non-profits (i.e. arts, festivals)
- Community tourism champions
- Community resident champions

## Appendix E. Survey

The DSS Destination Development Survey was designed to capture wider community opinions and feedback on opportunities, the current state, and future outlook for Silver Star as a destination.

Survey Monkey was used to deliver the online survey that was launched in advance of the DSS Board Workshop on June 16, 2023. The survey was promoted via the DSS e-newsletter, the DSS Destination Development Plan Facebook Group, and direct personalized email to key stakeholders, ie. Engagement Committee, Board, etc. The survey ran from June 15 to August 21, 2023. Total response rate was N=213.

The survey was programmed to capture respondent feedback in three separate datasets, detailed below.

- Tourism Related Businesses (N=23): On Mountain Accommodations (Hotel, Lodge, Short-Term Rental Owners in Canada and International), Retail, Restaurants, Tours, Experiences
- Tourism Supporters (N=185): Silver Star Residents, Personal Use Owners that Live Elsewhere, Local Government Officials, DSS BOD, DMO Network Partners, Indigenous Leaders and Partners, Community Organizations and Clubs, Non-commercial recreation clubs, Sector associations, Community Non-profits (i.e. arts, festivals)
- Both (N=5): Tourism Related Businesses and Tourism Supporters, as defined above

### *Respondent Profile*

#### Member Type

- Tourism Related Businesses
- Tourism Supporters
- Both (Tourism Related Businesses and Tourism Supporters)

#### Employees

- 85% have 1 to 4
- +62% from outside community
- 55% FT | 45% PT
- 58% employed seasonally

#### Seasonality

- Spring and Fall no share of business
- Summer peak season for 36%

## Diversity, Equity, and Inclusion

- 1/10th business respondents say up to 25% staff BIPOC
- Nearly quarter indicated <25% staff LGTBQ
- 50% business owners female | 10% owners LGBTQ
- 69% feel Silver Star at least somewhat accessible to persons with a disability

## *Key Insights*

- Early indications are that Silver Star businesses are bullish on their recovery, with some saying last year was their 'best year ever.' Others worry about a looming global downturn. Seemingly at odds with this, some businesses indicated strong worry noting business closures and difficulty making a sustainable living.
- Survey respondents indicated that the biggest destination development challenges facing business in the next five years are: Staff Housing, Labour Shortages, Economic Uncertainty, and Climate Change.
- 92% of businesses have no awards or certifications related to sustainability. Some measure or report their water usage, energy consumption, waste production, and carbon emissions.
- Small town feel and the sense of community are key aspects of the resort that locals, businesses, and home investors do not want to lose. The strongest and most unique assets to tourism and recreation at Silver Star were identified as its diversity of offerings, natural environment and family friendly atmosphere. Respondents added that Silver Star's proximity to nearby cities (ie. Vernon, Okanagan Valley, Int'l Airport) is undersold.

## Appendix F. Interviews

One-on-one, semi-structured interviews collected insights from key stakeholders to gather the same understanding of the current state and opportunities.

Focused on getting a deeper perspective, a total of 12 in-depth interviews were conducted between May-November, 2023. Each interview session was 30 minutes to one hour in length and participants were asked 8 to 10 open-ended questions. The same questions were posed to each individual to ensure consistency.

### *Key Insights*

- Visitors like Silver Star for its small town feel and diversity of quality year-round offerings followed by its sense of community, unique character and family friendly atmosphere.
- In terms of what Silver Star is doing well, resort management, maintaining standards and choosing value over volume were the strongest themes shared on this topic.
- Growing demand, dealing with environmental emergencies and economic uncertainty were top of mind as the external issues and trends that will have the biggest impact on Silver Star's business. Meanwhile, labour shortages and adequate staff housing are entrenching themselves as the most challenging internal operational issues that need solutions.
- Improved accessibility is an opportunity. Local adaptive programs should be 'ramped up,' while storefronts need proper ramping for people with disabilities.
- Sun Peaks stands as the competitive benchmark followed by Big White, Whistler, and Revelstoke.
- From the perspective of local business operators, growing summer as well as early season and late season where passes are less are key market development priorities. Others feel Main Street is an underutilized and underperforming asset.
- Sustainability is largely understood as involving a holistic approach. POWDR and SilverStar Mountain Resort LLP oversee Play Forever, which funds local charities that improve community health and wellness like new bikes for the local school district. Conversely, there is a perception that waste management needs urgent attention, including moving away from single use plastics.



## Appendix G. DSS Member Engagement Workshop

Field research was completed during the Destination Silver Star member workshop on September 11, 2023, to gather perceptions, attitudes and beliefs about the ecological, social and economic pressures facing Silver Star. A total of 50 stakeholders participated in the workshop that featured dynamic exercises and interactive technology.

### Sustainability (Doughnut Exercise)

In 2009, the leading earth system scientists from around the world, came up with a way of measuring just how much pressure humans can safely put on the planet. They identified nine (9) boundaries that form the earth's 'Ecological Ceiling.'

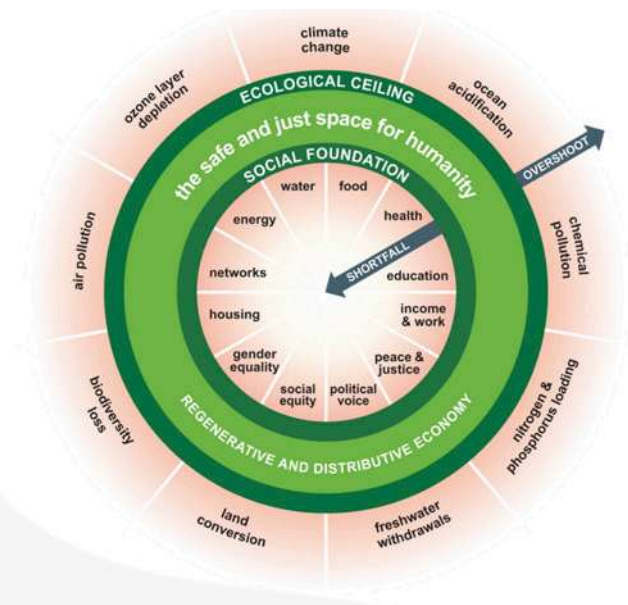
- 4 Four boundaries relate to the air we breathe: localised air pollution, atmospheric ozone layer depletion, atmospheric carbon dioxide emissions leading to climate change and then dissolving into the oceans leading to ocean acidification.
- 2 There are two boundaries that pollute the land and seas: chemical pollution (that include plastics, metals, synthetics and chemicals) that can't be returned to the planet's natural cycles; and nitrogen and phosphorus loading from industrial farming.
- 2 There are two localised impacts of freshwater withdrawals and land conversion (for farming, industry, housing, transport, and so on) that have immediate local effects, and that collectively undermine global resilience.
- 1 All of these have an impact on life and so lead to biodiversity loss.

Years later, regenerative economist Kate Raworth proposed there also needs to be an inner boundary that denotes the social foundation of what it means to meet the essentials of a good life. Recognizing that symbols and illustrations have great power to inspire change, the *Doughnut* became Raworth's illustrated model mapping the existence of these inner and outer ring boundaries, and the dangers of living outside them.

## The Doughnut. A Compass for 21st Century Thriving

Between these two boundaries lies a doughnut-shaped space that is both ecologically safe and socially just – a space in which destinations can thrive.

The goal is to leave no one falling short on the essentials of life, without overshooting planetary boundaries.



Source: Kate Raworth, *Doughnut Economics Action Lab*

Inspired by Raworth’s team and the Doughnut Economics Action Lab (DEAL), Destination Silver Star workshop participants were taken through an exercise to help them understand the Doughnut, and to help them give voice to the pressures facing the local community.

### Key Insights

Silver Star visitors and tourism-related businesses help the resort community live within the **Doughnut** through a number of environmental and social practices (see below table). Most prominently, these include recycling and waste reduction efforts (e.g., composting, recycling, zero single-use plastics), the provision of experiences that contribute to health and wellness (e.g., physical activity, time in nature), as well as creating an accessible and inclusive environment (e.g. activities for all ages, DEI hiring practices, indigenous partnerships).

**Table G1** Ways Silver Star Members and Visitors Help Keep the Resort Sustainable

	N	%
<b>Recycling and Waste Reduction</b>	<b>28</b>	<b>21.37%</b>
<b>Health and Wellness Promotion</b>	<b>27</b>	<b>20.61%</b>
Accessibility and Inclusivity	13	9.92%
Water Management and Conservation	9	6.87%
Community and Social Engagement	7	5.34%

Source: DSS Member Workshop, 2023 (N = 131 responses)

Silver Star visitors and tourism-related businesses contribute to social and ecological pressures in a number of ways (see below table). Most notably, these pressures include transportation emissions (e.g. visitors/staff travel, reliance on private car), waste production (e.g. inadequate recycling, food waste, disposables), and inadequate land use practices (e.g., deforestation for development, building larger homes, disrupting/polluting habitats).

**Table G2 DSS Member Contributions to Local Social and Ecological Pressures**

	<b>N</b>	<b>%</b>
<b>Transportation Emissions</b>	<b>41</b>	<b>30.83%</b>
<b>Waste Production</b>	<b>20</b>	<b>15.04%</b>
<b>Inadequate Land Use</b>	<b>16</b>	<b>12.03%</b>
<b>Water Consumption</b>	<b>13</b>	<b>9.77%</b>
Poor Accessibility and Inclusion	5	3.76%

Source: DSS Member Workshop, 2023 (N = 133)

Social and ecological pressures come back to create risks and impacts for Silver Star visitors and tourism-related businesses (see below table). The greatest threats identified included damage to the operating environment (e.g., forest fires, pollution, and a loss of wildlife), declining health and wellness of stakeholders (e.g., depression, anxiety, pandemics, and air quality), as well as rising costs due to inflation.

**Table G3 Social and Ecological Pressures Impacting Silver Star Businesses**

	<b>N</b>	<b>%</b>
<b>Damage to Operating Environment</b>	<b>24</b>	<b>17.65%</b>
<b>Health and Wellness</b>	<b>19</b>	<b>13.97%</b>
<b>Rising Costs</b>	<b>17</b>	<b>12.50%</b>
Loss of Business	12	8.82%
Climate Change and Weather Patterns	12	8.825

Source: DSS Member Workshop, 2023 (N = 136)

# Destination Vision

With the ecological and social impacts and opportunities more clear in their minds, workshop participants better understood that the economic foundations of destination management need to change. The most important being the need for a more evolved definition of growth. Raworth reminds that progress can no longer be endless growth. The future will ask us to “create economies that make us thrive, whether or not they grow.”

After being introduced to the fundamentals of regenerative economics (see previous **Doughnut Exercise** section above), DSS members helped set new destination development goals that fell out of the community’s collective vision of a future where the Silver Star community is thriving.

Using an experiential sensory exercise, participants were asked to travel to the future and list what they considered evidence that Silver Star had realized its full potential as a sustainable destination. This method focused more on positive, emotionally motivated outcomes, rather than wordsmithing a lowest-common denominator community vision into a single paragraph.

Like a healthy forest, the evidence that community well-being is present forms the forest canopy: happy locals, personal health, financial equity, clean air, etc. Inputs like political power, money, human resources, assets, infrastructure and more rarely (if ever) mentioned, but are understood to be the main inputs that will help the destination realize its vision of well-being.

## Community Vision for Well-Being



Source: DSS Member Workshop, 2023

Turning this new destination vision of well-being into goals requires a new framework for measuring community well-being. Following a thorough analysis, the **New Economics Foundation** distilled community well-being down to five (5) simple acts, illustrated below. Besides being more holistic, these measures also fall much more in line with Indigenous worldviews.



Source: New Economics Foundation

Organizing workshop visioning feedback into one of these five simple acts, shows that experiencing joyful moments, connecting to people, spending time in nature and feeling safe and secure are the most important and relevant factors contributing to community well-being.

**Table G4 Destination Silver Star Vision for Well-Being: Signals of Progress**

	<b>N</b>	<b>%</b>
<b>Experiencing joyful moments</b>	<b>47</b>	<b>55.29%</b>
<b>Connecting to the people around us*</b>	<b>34</b>	<b>40.00%</b>
<b>Spending time in nature</b>	<b>31</b>	<b>36.47%</b>
<b>Feeling safe and secure</b>	<b>26</b>	<b>30.59%</b>
Being active in our bodies*	8	9.41%
Taking notice of the world*	8	9.41%
Giving to others*	8	9.41%

Source: DSS Member Workshop 2023 | New Economics Foundation, 2008

- Experiencing joyful moments: Happy, energized, joyful, excited, enthusiastic, exhilarated, optimistic, positive, playful, vibrant, prideful, strong, magical, colorful, busy, bustling, smiling, laughing, having fun, thriving, and prospering.
- Connecting to the people around us: Engagement, community, inclusiveness, togetherness, cohesion, love, integration, collaboration, cooperation, harmony, welcomingness, oneness, belonging, appreciation, worthiness, hugs, family, friendship, and diversity.
- Spending time in nature: Natural, clean, fresh, balanced, open, authentic, looked-after, green, lush, beautiful, and responsible.
- Feeling safe and secure: Safe, at peace, content, calm, satisfied, relaxed, quiet, tranquil, fulfilled, comfortable, and unaffected.

With the community’s vision more clearly expressed and prioritized, a result-based measurement technique was applied to translate this vision into goals, illustrated in the below table. This same technique then translated these goals into relevant and reliable measures that could realistically be defined, implemented and used over time to signal whether or not Silver Star destination development plans were truly serving the community’s vision.

**Table G5 DSS Destination Goals, Measures and Targets**

Destination Vision for Well-Being	Community Ranking	Goal	Measure	2024 Target
Experiencing Joyful Moments	1	Living, working and playing at Silver Star makes people happy	Happiness Index	Baseline
Connecting to the People Around Us	2	Silver Star has a strong sense of community	Sense of Community Scale	Baseline
Spending Time in Nature	3	Get people outside to improve their mental and physical well-being	Mental and Physical Health Metrics	Baseline
Feeling Safe and Secure	4	Provide a safe place to relax and let go of your day	Psychological Safety Measures	Baseline

Source: DSS Member Workshop 2023 | New Economics Foundation, 2008

*In 2024, Destination Silver Star is committed to measuring community well-being in these four most important areas and setting a baseline and targets for 2025.*

While certainly new to the field of destination development, other professions and industries have developed a robust inventory of methods and instruments to measure community well-being. A quick Internet search reveals dozens of formalized and tested methods that destination management leaders should review, discuss, and adopt if the tourism industry is going to get serious about measuring non-economic performance indicators that signal improvements to key outcomes that are expected from more sustainable tourism practices.

## Community Strengths (CCF)

At the workshop, participants were also polled using the Community Capitals Framework (CCF). Looking at seven specific dimensions and their interactions, CCF looks at a community's assets (not needs or problems) and whether they are being put to good use. Some assets can be invested to generate more assets. Neglected assets depreciate and in the process, cause harm to the community unless something is done about it. Because of its full-circle take, CCF has become one of the main lenses for community analysis and development around the world.

### The Seven Community Capitals



Source: Chart Developed by the Purdue Center for Regional Development

Using an online interactive polling platform, workshop participants were asked to share insights on community capitals including built, natural, social, cultural, and human assets to the region. The platform allowed participants to share their ideas in real time, anonymously.

### *Key Insights*

- Empty buildings and commercial space, a Chilcoot Conference Centre that's too quiet, and mostly empty National Altitude Training Center topped the list of building capital that Silver Star members felt were the most under-utilized assets in the community.
- Local arts and heritage, mountain culture and vibrant culinary scene are storied opportunities. The challenge of activating Silver Star cultural assets was met with a long list of unique ideas worth further exploration like a welcome host dinner every fall for new staff, First Nations culture and history integrated into the community, local artist shows and author readings, wildcrafting interpretive tours, and film events celebrating mountain culture.
- Silver Star's natural space and quality terrain are strengths and present opportunities. Unsung natural capital mentioned was Proctor Lake, the full expanse of trails for nordic and fat biking, ample space for an outdoor amphitheater, going 'further and farther' with terrain extensions allowing for backcountry skiing and multi-day backcountry hiking loops with more lookouts over the Monashees, wildcrafting tours, adaptive adventures, yoga platforms and better trail network connections between Silver Star and Sovereign Lake.

The Community Capitals Framework approach is most powerful when the community is able to stand back and look for leverage points across multiple capitals, starting with potential connectors who can lead the work with the right community support behind them. For example, local trail running group Bush Babes could invite visitors to explore lesser known trails and help reduce congestion on more popular routes. The non-profit North Okanagan Cycling Society, who hosts social rides at Silver Star and works to maintain trails that form important extensions of Silver Star's controlled recreation area, could be tapped to help host a mountain bike film, skills and gear festival with special events and trade activations at the Chilcoot Conference Centre. Bike dealer meetings, using in-town shops as ambassadors, and leveraging being a host of the Crankworx Summer Series also present collaborative opportunities.

A winter festival in partnership with Sovereign Lake Nordic Club could similarly program events at the conference centre designed to promote and fund increased trail usage, connectivity and marketing between it and the resort. Destination Silver Star could establish an annual gathering of connectors to review the CCF data with the goal of establishing community-driven initiatives that could make fuller use of underutilized local assets<sup>11</sup>.

11 See CCF dataset from DSS Member Workshop, September, 2023.



Q2: What built assets pose strengths and opportunities for tourism?

**Table G6 Silver Star's Built Capital**

	<b>N</b>	<b>%</b>
Trail and Lift System	15	13.04%
Chilcoot Conference Centre	13	11.30%
National Altitude Training Center	9	7.83%
Commercial Space	8	6.96%
Accommodations	5	4.35%
Lot E	4	3.48%
Ski-in, Ski-out Infrastructure	3	2.61%

Source: DSS Member Workshop 2023 (N = 115)

Q3: What natural assets pose strengths and opportunities for tourism?

**Table G7 Silver Star's Natural Capital**

	<b>N</b>	<b>%</b>
Natural Space and Quality Terrain	15	20.00%
Ideal Climate and Weather	9	12.00%
Native Flora and Fauna	6	8.00%
Access to Water (e.g., Brewer's Pond)	6	8.00%
Picturesque Views	2	2.67%

Source: DSS Member Workshop 2023 (N = 75)

Q4: What social groups pose strengths and opportunities for tourism?

**Table G8 Silver Star's Social Capital**

	<b>N</b>	<b>%</b>
Recreational Groups*	12	31.58%
Arts & Culture Groups**	10	26.32%
Local Community Groups***	3	7.89%
Indigenous Community Groups (i.e., OKIB)	3	7.89%

Source: DSS Member Workshop 2023 (N = 38)

\*NOCS, VSC, SSFC, SSASS, SLNC, Bush Babes, Naughty Neighbours, Vernon Adaptive, CRIS Adaptive Adventures, Access Revolution, Spinal Cord Injury BC

\*\*Mountain Museum, Arts Council, Book clubs, Bridge clubs, Games groups, Local Losers

\*\*\*Rotary Club, Optimists Club, Mamas for Mamas, Property Owners Association

Q5: What cultural assets pose strengths and opportunities for tourism?

**Table G9 Silver Star's Cultural Capital**

	<b>N</b>	<b>%</b>
Local Arts and Heritage*	10	22.22%
Mountain Culture**	9	20.00%
Regional Food and Beverages	8	17.78%
Indigenous Culture and History	6	13.33%

Source: DSS Member Workshop 2023 (N = 45)

\*Writers, Artists, Artisans, Musicians, Historian

\*\*International visitors/staff, Hospitality, Storytelling, Community events and activities

\*\*\*Produce, Wine, Craft beer

## Appendix H. Solution Groups

In a Question Burst exercise focused on making local businesses more resilient and helping employees with better transportation and housing, Silver Star community members were able to zoom-in on key questions and work together to brainstorm an impressive list of early answers.

Traditional to destination development planning, sector focus groups are effective at gathering immediate and expert feedback on a wide range of priorities, challenges, and opportunities. Unfortunately, they also promote siloed thinking and divert focus from ecosystem-based approaches that discover important efficiencies, common ground, and opportunities for cross-collaboration.

Looking to harness the benefits of resort-wide ideas, the project adopted a Solution Group methodology built on the premise that ‘Questions are the Answer.’<sup>12</sup> Here, the Executive Director of the MIT Leadership Centre Hal Gregersen asks destination managers to focus on more catalytic questions. Asking better questions will deliver breakthrough solutions, knock down barriers, open up new spaces, challenge norms, and send energy down more productive pathways.

Using Gregersen’s Question Burst Method, destination managers and businesses are better able to reframe the problem, think differently, and adopt a growth mindset.

**Reframe the Problem:** A destination’s advantage will only come from asking great questions that break down assumptions and reframe the problem in an entirely different way.

**Think Differently:** Our ability to unleash creative thinking with the ultimate goal of thinking differently will deliver a competitive advantage that can’t be easily duplicated by other destinations.

**Adopt a Growth Mindset:** Rather than accepting limits or allowing ourselves to be hemmed in by convention, a growth mindset gives people the freedom to challenge the status quo, and reframe what we think we know about destination management, running a volunteer society and even, being on a Board.

A total of three (3) Solution Groups were planned to be carried out. These groups were designed to invite members interested in the following:

- Making the Resort Community More Sustainable
- Helping Small Businesses and Local Economy Thrive
- Hiring and Retaining Great Employees

12 Questions are the Answer: A Breakthrough Approach to Your Most Vexing Problems at Work and in Life, Hal Gregersen, HarperCollins, 2018.

Due to scheduling conflicts and stakeholder availability, the small business and staffing Solution Groups were combined into a single session to facilitate attendance. The Solution Group took place on October 27, 2023 via a 1.5 hour video call with seven (7) participants.

Using a Question Burst exercise, the group was presented with a short, two (2) minute synopsis of two specific challenges that surfaced in the project research. After the opportunity was presented, each member of the group was given 3 minutes to quietly and on their own ask as many related or inspired questions as came to mind. Questions were entered using an online mobile polling platform and participants were not allowed to voice added concerns, considerations, ideas or solutions during the allotted time. As a group, participants were then allowed a couple of minutes to review the questions presented before restarting a final round of the same question burst exercise.

In the final step, participants were asked to identify a single question that resonated with them enough that they would be willing to invest in finding answers or solutions. Using these questions as the focus, a short group brainstorm revealed promising solutions.

### ***Q BURST: Local Business Drought***

The wider resort business community understands that ‘if the chairlifts are running, the resort is making money.’ But a thriving local business community also employs locals, increases local taxes, and gives back to the community. More than that, a resort’s competitive position depends on serving guests with a healthy variety of shops, restaurants, accommodations, experiences, and fun things to do when they’re not on the mountain. Before COVID, Silver Star had a competitive line-up of summer and winter experiences on offer. Now, these options have all but disappeared. Right now, Silver Star businesses are struggling to stay open, while others are cashing out with few (if any) new businesses rushing in to take their place.

### **Most Important Question**

How Can Local Businesses Work Together to Cut Costs and Scale Up?

### **Why is this Important?**

Local small businesses need support building healthier bottom lines. Working together, they can leverage their superior business knowledge to become more resilient and sustainable.

### **Solution Group Ideas**

- Combine bulk buying power to purchase commonly used par stock and food ingredients to reduce costs.
- Leverage common infrastructure needs like developing a shared commissary kitchen to cut overhead and also operate the space as a village employee kitchen where affordable meals could be purchased using pooled ingredients, resulting in less kitchen waste and improved employee mental health for youth needing connection and community.

### ***Q BURST: Empty Staff Rooms***

Resorts are finding it incredibly hard to find and keep staff. The food service sector is having a particularly hard time of it. Making things worse, staff wages aren't keeping up with inflation and those that want to work, can't find a place to live on the mountain or in town.

#### **Most Important Question**

Can Private-Sector Transportation Solutions Fill The Gap in Service to the Mountain?

#### **Why is this Important?**

Increased affordable transportation options between Silver Star and Vernon would open up access to a larger rental pool, increase employee disposable income, and reduce vehicle emissions.

#### **Solution Group Ideas**

- Elements Bus Repairs and Parts could be supported with business planning, startup capital and grants, operations and staffing to deliver private-sector electric bus service between Vernon and Silver Star.

#### **Most Important Question**

Can Local Networks Be Empowered to Deliver Affordable Housing Options to Resort Employees?

#### **Why is this Important?**

Local associations have their own networks that could be approached for housing options, while SilverStar Mountain Resort's buying power could be leveraged to secure better and longer term rental terms.

#### **Solution Group Ideas**

- SilverStar Mountain Resort in partnership with Destination Silver Star could provide mountain and retail incentives and/or employer guaranteed leases to Vernon landlords previously reluctant to house seasonal staff.
- The new RV Park and Campground could make allotments to offer fully serviced lots reserved for staff who could rent trailers or bring their own.
- Sovereign Lake Nordic Members could be approached to list available rental accommodations.

# Appendix I. Competitive Analysis

## Competitive Set Topline Analysis

Competitive intensity is high amongst Southern BC mountain resorts except for summer when Big White and Sun Peaks trail behind slightly. If nothing else mattered, positive reviews would put Silver Star in a dead heat with Revelstoke Mountain Resort, Big White, Sun Peaks, and Whistler Blackcomb. Across the board, these resorts position themselves similarly around their 'unique' features and benefits that promise the same casual to fine-dining, beginner to intermediate to expert slopes, cozy family friendly, warm exceptional service, speedy lift access, sweeping terrain, and more.

The greatest variability comes down to product breadth and depth with Whistler in the clear lead and Revelstoke benefitting from its purposeful and seamless association with the town's strong offering (see the **Detailed Product Breadth and Depth Analysis** section below for detailed analysis). Whether they have direct air access or not, these resorts are near sellouts in the winter with guests from Europe, the UK, America, Australia, and increasingly Asia. With mud-season wiping out any possibility of competing as a 4-season destination, resorts have turned their attention to summer as the next competitive battleground.

**Table I1 Silver Star Resort Winter/Summer Competitive Set Topline Analysis**

Competitor	Performance Rating	Operating Season	USP	Weakness	Direct Air Access	Competitive Intensity Winter / Summer	
SilverStar Mountain Resort	4.7 (2,441 Google Reviews)	Winter: Late November – Early April  Summer: Late June – Mid September	<ul style="list-style-type: none"> <li>- One of Canada’s oldest and largest resorts</li> <li>- Colourful village with small town feel, central main street and unique mountain culture</li> <li>- Uncrowded</li> <li>- 100% natural snow</li> </ul>	<ul style="list-style-type: none"> <li>- Weaker product breadth and depth</li> <li>- Limited events programming</li> <li>- Nordic network difficult to access</li> <li>- Lack of shuttle service</li> <li>- Ski runs have too many flats and lifts too spread out</li> </ul>	Yes (YLW, 65 km)		
Revelstoke Mountain Resort	4.7 (3,309 Google reviews)	Winter: Early December – Mid April  Summer: Mid May - Late: September	<ul style="list-style-type: none"> <li>- Big Mountain Terrain, longest vertical descent in North America</li> <li>- Broad depth and breadth of winter and summer experiences</li> <li>- Close to vibrant town of Revelstoke extending wide range of boutique shops, gourmet restaurants and accommodation options</li> </ul>	<ul style="list-style-type: none"> <li>- Limited on-mountain accommodations, retail and restaurant options</li> <li>- Traffic congestion on powder days</li> <li>- Crowded lift lines and poor trail markers</li> </ul>	No (YLW, 187 km)	High	High
Big White Ski Resort	4.7 (3,979 Google Reviews)	Winter: Late November – Early April  Summer: Late June – Early September	<ul style="list-style-type: none"> <li>- Canada’s 2nd largest lift system</li> <li>- Canada’s largest ski-in, ski-out village</li> <li>- Canada’s largest resort night skiing area</li> <li>- 20 on-site restaurants sourced locally</li> </ul>	<ul style="list-style-type: none"> <li>- Limited Summer offerings and retail options</li> <li>- Limited events programming</li> <li>- Poor visibility</li> </ul>	Yes (YLW, 62 km)	High	Low

Competitor	Performance Rating	Operating Season	USP	Weakness	Direct Air Access	Competitive Intensity Winter / Summer	
Sun Peaks Resort	4.7 (2,565 Google Reviews)	Winter: Mid November – Early April  Summer: Mid June – Late September	<ul style="list-style-type: none"> <li>- Canada's second largest ski area with 3 peaks, all accessible from village</li> <li>- Lift access to peaks in the summer</li> <li>- Unique European-styled, ski-through village</li> <li>- BC's highest 18-hole golf course</li> <li>- Plenty of shopping and dining options</li> </ul>	<ul style="list-style-type: none"> <li>- Weaker product breadth and depth</li> <li>- Desolate atmosphere in summer</li> <li>- Resort amenities and terrain spread out weakening sense of personal connection and local vibrant mountain culture</li> <li>- No proximity to an international airport</li> <li>- Crowding in peak seasons</li> </ul>	Yes (YKA, 60 km – but not an intl. airport)	High	
Whistler Blackcomb	4.6 (4,944 Google Reviews)	Winter: Late November – Mid May  Summer: Mid May – Early October	<ul style="list-style-type: none"> <li>- Named North America's best ski resort</li> <li>- Diverse and wide-range of offerings including record-breaking PEAK 2 PEAK Gondola</li> <li>- One of the longest ski seasons in North America</li> <li>- Over 200 shops and 150 dining options</li> <li>- After hours, nightlife options</li> <li>- Free outdoor skating rink</li> </ul>	<ul style="list-style-type: none"> <li>- High price point</li> <li>- Crowded lift lines during peak seasons</li> <li>- 2hr 30 mins transfer time from YVR to Whistler Village Centre</li> <li>- Over-commercialization</li> <li>- Lack of Beginner Terrain</li> <li>- Larger scale and transient international clientele make it hard to feel the presence of the distinct local mountain culture</li> </ul>	No (YVR, 135 km)	High	High



## Detailed Price-Performance Values Mapping

Visitors don't make their travel purchase decisions based on price alone. Far from it. The experience and other benefits, which are often difficult to quantify, create value too. An analysis of the interactions between the price and performance of experiences relative to those of your competitors can help destinations lean into new areas of improvement.

Given the opportunity to grow summer business, a relative price-performance analysis compared Silver Star with summer competitors Sun Peaks, Big White, Revelstoke Mountain Resort, and Whistler in the following categories:

- Mountain bike parks
- A selection of 4- and 3-star hotels
- A selection of upscale and everyday restaurants
- Tours, experience, and attractions

### Price-Performance Value Map



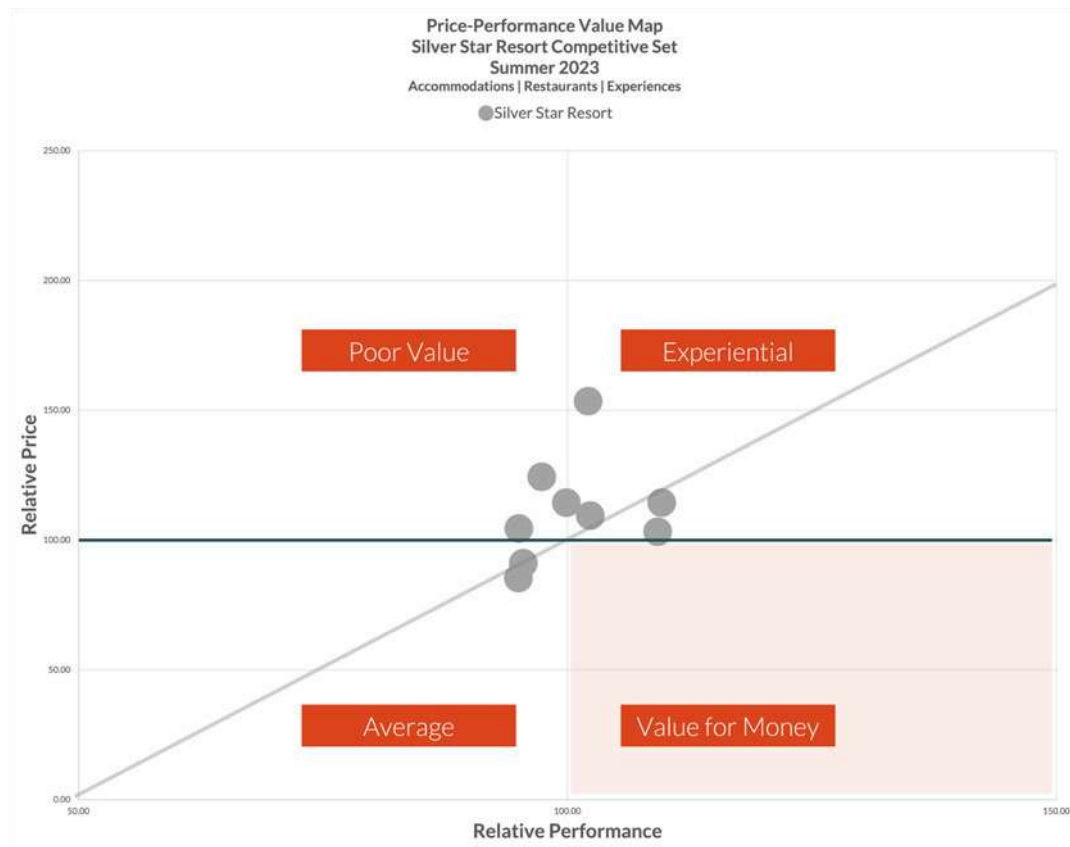
## Silver Star Accommodations, Restaurants, Experiences

A good number of Silver Star accommodations, restaurants and experiences provide strong experiential value, meaning visitors give it high marks and pay a premium.

As service standards get back up to par and businesses shake off the COVID hangover, performance ratings will climb for others and so will revenue.

Team building, energetic guest service training and yield-management will help move more accommodations, restaurants and activities back into more profitable territory.

**Table 12 Silver Star Accommodations, Restaurants, Experiences**

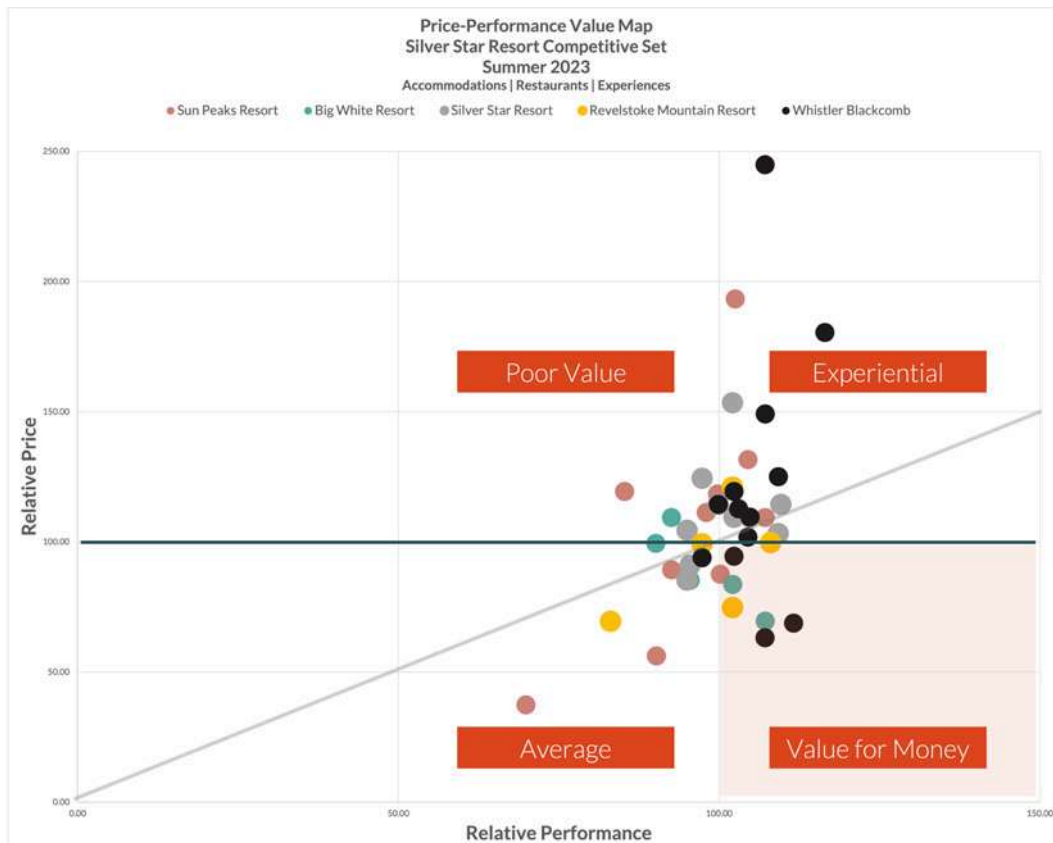


## Silver Star Competitive Set: Accommodations, Restaurants, Experiences

Looking at the full competitive set, Silver Star doesn't compete in the value for money market segment. Instead, it has a solid foothold in the coveted experiential arena where guests are all too willing to pay a premium for the wonderful experience. This arena only sees Silver Star punching above its weight class to square off against the Whistler Blackcomb experience.

Revelstoke Mountain Resort remains an intense competitor, especially with respect to the breadth and depth of its offering, but the price-performance of key assets shows the destination trailing or at least, failing to capitalize on its strengths.

**Table 13 Silver Star Competitive Set: Accommodations, Restaurants, Experiences**



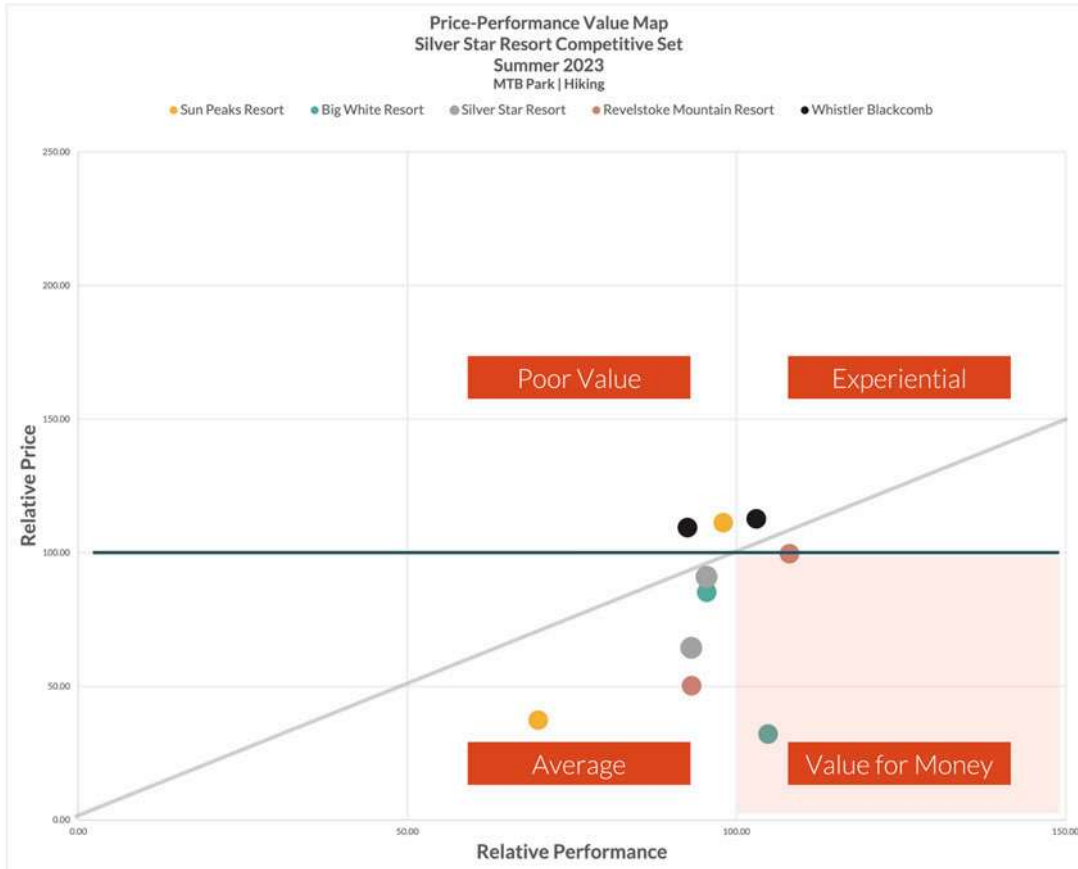
## Silver Star Competitive Set: Mountain Bike Park, Hiking

In what should be of great concern to all resort competitors, mountain biking enthusiasts ready to send it, and hikers all laced-up to hit the trails found the bike park and on-mountain trails to provide most average value.

With sizable investments being made by all competitors in building out trails, resort amenities to service and celebrate riding culture, and campgrounds to meet a wider range of preferences, resorts should be investing as well in the user experience and finding ways to earn higher performance ratings, to start.

Despite lessons learned from US resorts that cash-in on making world-class hiking trails accessible, Canadian resorts continue to lag behind in taking advantage of the increased wave of interest in point-to-point, loops, epic climbs and hut-to-hut backcountry hikes. This, in spite of BC and Alberta being recognized as offering the greatest wilderness hiking in the world.

**Table I4 Silver Star Competitive Set: Mountain Bike Park, Hiking**



## Detailed Product Breadth and Depth Analysis

A wide and deep bench of experiences provides greater visitor value, commands price premiums that benefit your local community, and strengthens your destination brand power. Noted and celebrated economist Michael Shuman focuses on the power of spending in locally-owned retail businesses and their ability to generate 2.5 times more benefits (taxes, income, jobs) than large outside-owned chains.<sup>13</sup> The Harvard Business Review published an exhaustive study of US cities proving that more small firms meant more jobs.<sup>14</sup> In fact, a focus on locally owned businesses can eliminate poverty and increase per capita income.<sup>15</sup>

### LEGEND

	Product Exists	1 point
	Product Weakness	0.5 points
	No Product	0 points

### SUMMER

Products	Travel Driver*	Sun Peaks Resort	SilverStar Resort	Big White Resort	Revelstoke Resort	Whistler Blackcomb
MTB Park	Yes					
Bike School	No					
Hiking	Yes			Few trails		
Spa	Yes			Mobile		
Fitness Centre	No				In hotel	In hotel
Shopping	No		Minimal	Minimal	Minimal	
Events	Yes		Minimal	Minimal	Minimal	
Tours	No					
Lakes	Yes		Pond			
Gallery	No	Gift Shop			Off-site	
Pool	No			In hotel	In hotel	In hotel
Motorized Rec.	Yes	e-bikes	e-bikes		Off-site	
Disc Golf	No					
Museums	No				Off-site	
Golf	Yes				Off-site	
Paddling	No				Off-site	
Games Area	No					
Rock Climbing	No				Off-site	
W.W. Rafting	No				Off-site	
Aerial Touring	No				Off-site	
Rope Course	No					Small

13 Shuman, YouTube, March, 2016

14 The Secret to Job Growth: Think Small, Glaeser and Kerr, Harvard Business Review, August 2010

15 Federal Reserve of Atlanta, 2013

Heli-Hiking	No				Off-site	Off-site
Mountain Coaster	No					
Zipline	No					
<b>TOTAL</b>		<b>15</b>	<b>10</b>	<b>6.5</b>	<b>15.5</b>	<b>20</b>
<b>INDEX</b>		<b>150</b>	<b>100</b>	<b>65</b>	<b>150</b>	<b>200</b>

\*Travel driver is defined as activity that would motivate a visitor to travel to a destination (i.e., anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.

## WINTER

Products	Travel Driver*	Sun Peaks Resort	SilverStar Resort	Big White Resort	Revelstoke Resort	Whistler Blackcomb
Ski/Snowboard	Yes					
Sports School	No					
Tubing	No					
Snowshoeing	Yes				Off-site	
Motorized Rec.	No				Off-site	
Tours	No				Off-site	
Spa	Yes			Mobile		
Fitness Centre	No				In hotel	In hotel
Shopping	No		Minimal	Minimal	Minimal	
Events	Yes		Minimal	Minimal	Minimal	
Ice Skating	No					
Backcountry	No				Off-site	
Dog Sledding	No				Off-site	
Gallery	No	Gift Shop			Off-site	
Museums	No				Off-site	
Sleigh Rides	No					Off-site
Games Area	No					
Heli-Skiing	Yes					
Ice Climbing	No					Off-site
Paragliding	Yes					
<b>TOTAL</b>		<b>15.5</b>	<b>13</b>	<b>12.5</b>	<b>11</b>	<b>17.5</b>
<b>INDEX</b>		<b>119</b>	<b>100</b>	<b>96</b>	<b>85</b>	<b>135</b>

\*Travel driver is defined as activity that would motivate a visitor to travel to a destination (i.e., anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.



DESTINATION  
**SILVER STAR**

Destination Development Plan 2028

November 24, 2023

Destination Development  
Planning by

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