

RESEARCH RESULTS

KORE Regional Roundtables and Sector Survey



Publication Date: November 2023

Project Team: Lauren Rethoret (Research Lead and Report Author); Jonnah Ronquillo (Survey Intern); Dr. Sarah-Patricia Breen (Project Advisor)



On behalf of Selkirk College, I (we) acknowledge that we operate and serve learners on the unceded traditional territories of the Sinixt (Lakes), the Syilx (Okanagan), the Ktunaxa, and the Secwépemc (Shuswap) peoples.

Executive Summary

The Kootenay Outdoor Recreation Enterprise Society (KORE) partnered with Selkirk Innovates to undertake research that would help KORE 1) plan their strategic priorities for the next two to five years; and 2) gather data to support development of a regional sector profile. The research consisted of a series of in-person focus groups held around the region in June 2023, as well as a survey delivered in September and October 2023.

Key findings from the focus groups are that the KORE network is diverse, with businesses seeing the value that the KORE collaboration brings (especially through activities like networking/mentorship and exposure to new markets, driving more sales), but also pushing the organization to think strategically about who it serves and whether there is a need to tailor services to narrower categories of businesses. Participants made several suggestions for activities that KORE could take on over the next three to five years and these activities were prioritized through the follow-up survey. Businesses also recognized that their individual success is linked, in part, to the overall well-being of the outdoor recreation technology sector and recommended related activities that would elevate the profile of the sector amongst government, local communities, and consumers. A need for more comprehensive business supports or coaching services was also identified by some participants.

Findings from the survey confirm the diversity of the KORE network but also point to some commonalities that characterize the sector as consisting of small businesses that:

- have few employees and modest revenue;
- are focused on North American markets with the local Kootenay market remaining particularly important for some;
- value direct-to-consumer sales;
- are generally interested in growth, but visions of growth may be limited to a certain size that helps a small business achieve sustainability; and
- see sales, market diversification, and product/service diversification as keys to their growth.

Based on the combined findings from the focus groups and the survey, some possible next steps are identified for the KORE team. Many of these revolve around activities that individual businesses perceive as potentially supportive of their growth, sustainability, and competitiveness, while others are oriented toward growing a strong outdoor recreation technology sector. Under the first category, opportunities for KORE involvement include a formalized mentorship or networking program, activities that address personnel challenges like a directory of pre-vetted vendors or support to engage students, marketing activities, group buys, and working with businesses to grow sales outside of the Kootenays. Under the theme of growing the sector, opportunities that emerged include working with business support providers (e.g., KAST, Basin Business Advisors) to promote their services and address perceived gaps in support, increasing the visibility of the sector through events, creating outputs that help tell the story of sector and its impact (e.g., policy briefs), and stewarding the sector's 'ecosystem' by enhancing relationships with government and economic development partners, as well aligned sectors like tourism. A final potential focus area for KORE involves better defining the mandate and target audience for the organization itself. Values that could guide this process (e.g., products or services that are reflective of the Kootenay outdoor recreation culture and environment) were confirmed by survey participants.

Contents

- Introduction 1
- Methods 1
 - KORE Regional Roundtables..... 1
 - Data Collection..... 2
 - Data Analysis..... 3
 - Sector Survey 3
 - Data Collection..... 4
 - Data Analysis..... 4
- Results..... 4
 - KORE Regional Roundtables..... 4
 - One Word to Describe KORE..... 5
 - How *has* KORE helped your business?..... 6
 - How *could* KORE help your business?..... 7
 - One Word to Describe the Outdoor Recreation Technology Sector 9
 - What Does a Strong Outdoor Recreation Technology Sector Look Like?..... 10
 - What is Needed for a Strong Sector?..... 11
 - Sector Survey 13
 - Business Location..... 13
 - Business Activities..... 13
 - Related Outdoor Recreation Activities 14
 - Home Based Business 14
 - Length of Time in Business..... 14
 - Number of Employees 14
 - Annual Revenue 15
 - Location of Business Processes..... 15
 - Sales Channels..... 16
 - Location of Sales 17
 - Business Outlook..... 17
 - Business Growth 18
 - Priority Activities for KORE..... 18
 - Business Values..... 21
- Recommendations for Next Steps 22

Conclusion.....	25
Appendix A: Survey Instrument	26
Appendix B: Clarifying Descriptions Included with Survey	37
Appendix C: Detailed Roundtable Coding Results	40
Appendix D: Survey Data Tables	43

INTRODUCTION

The Kootenay Outdoor Recreation Enterprise Society (KORE) supports development of an economic cluster focused on outdoor recreation gear design and manufacturing in the Kootenay Region. KORE is currently planning their strategic priorities for the next two to five years and understands the importance of engaging sector participants and representatives in the design of future focus areas. Four years after its inception, KORE also recognizes the need to document the position and impact of the sector in a way that can build support for the diverse and growing businesses that are a part of it.

KORE approached Selkirk Innovates to request research support to understand the position and needs of the Kootenay-based outdoor recreation manufacturing and technology sector. The objectives of the research collaboration were twofold:

1. support KORE's strategic planning by identifying priority focus areas for the next 2-5 years; and
2. gather data to support development of a regional sector profile.

METHODS

The research involved two main components:

1. a series of focus groups (the "Kore Regional Roundtables") held around the Kootenay region in spring 2023, and
2. a survey delivered to KORE businesses in fall 2023.

KORE Regional Roundtables

The roundtables were organized and hosted by KORE, with Selkirk Innovates providing research support as well as input on the guiding questions and facilitation plan. Robyn Peel, the Community Futures East Kootenay Community Economic Development Coordinator and KORE Board Member, facilitated the roundtable sessions, and graphic facilitators from Michelle Laurie and Associates attended to visually document the conversations. The final graphic is included as **Figure 1**.

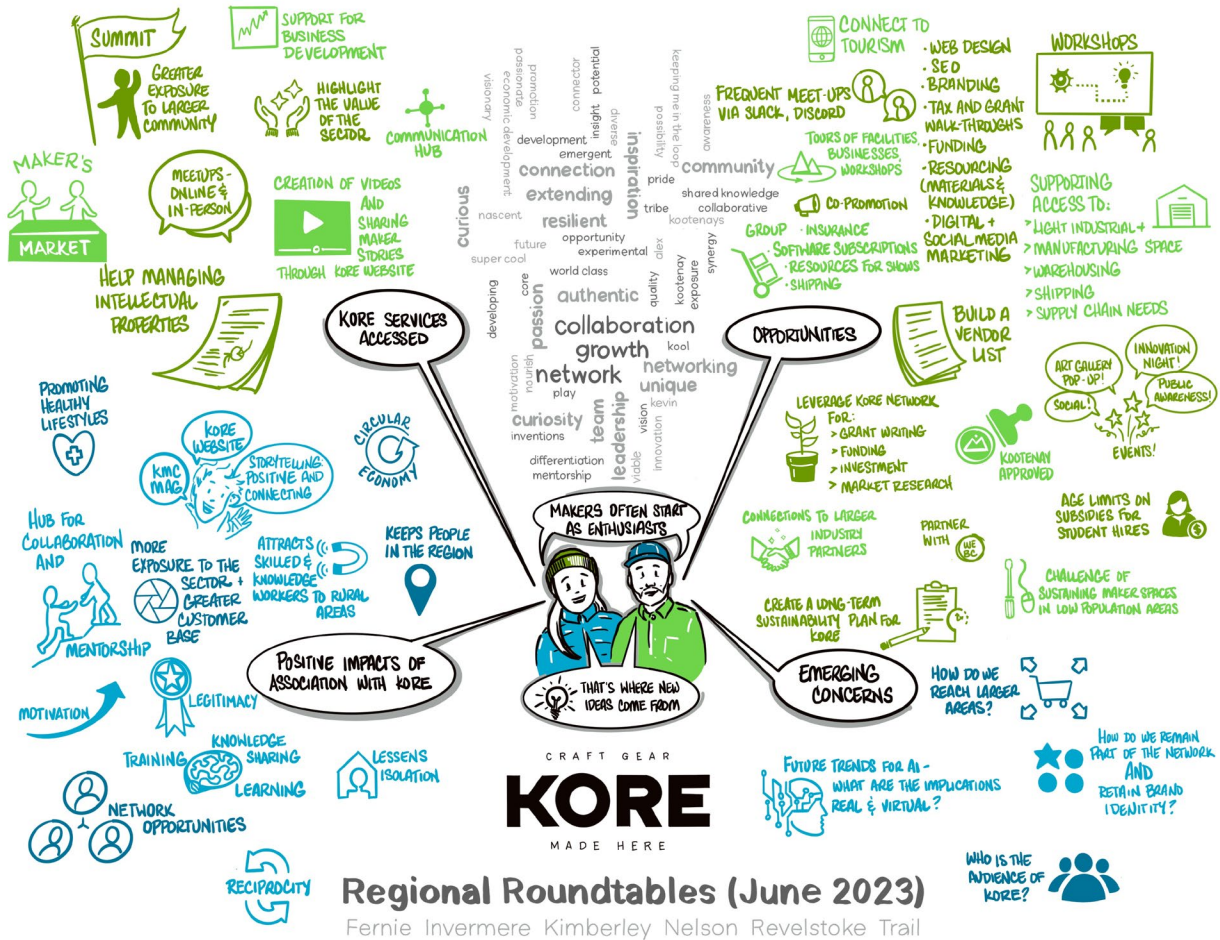


Figure 1: Graphic recording from Michelle Laurie and Associates

Data Collection

Roundtables were held in six Kootenay communities—Nelson, Trail, Invermere, Revelstoke, Cranbrook and Fernie—in June 2023. The events were approximately three hours long, with the first half being dedicated to “makers” (representatives of businesses in the outdoor recreation technology sector), and the second half welcoming participation from representatives of stakeholder organizations whose work supports the sector, either directly or indirectly (e.g., economic development agencies, tourism associations).

The first half of the roundtable was focused on the needs of the makers and their experiences working with KORE. Each attendee was asked to introduce themselves and their business, indicate when they joined KORE, and provide one word that they would use to describe KORE. The group was then collectively asked to provide input on the following guiding questions:

- How has participating in the KORE network impacted your business, and more specifically, what KORE activities or services have you used and what were the results?
- What activities or services could KORE offer that would directly help your business?

The facilitator would probe themes that emerged from group conversation. Following the initial sessions, as some themes proved to be common across communities, the facilitator would also prompt conversation if participants did not address these themes organically.

The second half of the roundtables was focused on the position and needs of the outdoor recreation technology sector. New participants from supporting organizations were welcomed, and everyone was asked to introduce themselves again, this time providing one word to describe the sector. The group was then collectively asked to provide input on the following guiding questions:

- What does a strong, connected outdoor recreation technology sector look like?
- What are our roles in creating this, and who needs to be at the table?

Selkirk Innovates' role during the roundtables was to take notes during the discussion. The sessions were also recorded; however, in the recordings, it was often difficult to hear the conversation and/or discern who was speaking. The recordings were therefore used only to fill gaps in the researcher's notes.

Data Analysis

Following completion of the sessions, the researcher thematically coded the notes for each community using themes that emerged from within the data (i.e., themes were not pre-established and then applied to the data). "Themes", or codes, are categories or groups of similar ideas that commonly appear in the data. NVivo software was used to support the coding process. As data analysis progressed through the notes from each community, if a theme emerged that hadn't been identified earlier in the process, the researcher would revisit notes coded earlier to look for references to the new theme that were present, but not strong enough to warrant development of a theme at the time that section was originally coded. Notes were generally coded by paragraph. If paragraphs referred to two distinct themes, they were coded once to each. For example, the following extract from the notes was coded once to "Events including Summit or Maker's Market" and once to "Market Expansion" under the question, "How could KORE help your business?":

Speaker 1: Speaker would like to see more of the markets. Especially if others landed sales or leads that transitioned to sales, like they did. Markets brings them into a customer facing environment. KORE doesn't have other ways to do this. If you want to grow a business, you don't do that by making more stuff, but rather by selling more stuff. Selling direct to customers is the most important for this business.

Data were then analyzed based on the number of references made to each code. Analysis was performed for each community, and then results of all roundtables were combined.

Sector Survey

The survey was designed to help KORE prioritize the suggestions from focus group participants regarding opportunities for KORE to support businesses and/or strengthen the outdoor recreation technology sector. Recognizing that to grow the sector KORE needs a better sense of the profile of the businesses involved, the survey also included several questions related to business type, size, and outlook. Selkirk Innovates researchers collaborated with KORE personnel to establish the survey instrument, a copy of which is included as Appendix A. To support the surveying process, certain survey terms were defined. These were available to respondents either by clicking links in the survey or, for those who completed

the survey during a structured interview, by asking the survey researcher for clarification. The clarifying descriptions are included as Appendix B. The survey protocol and questions were reviewed by the Selkirk College Research Ethics Board and approved as project number 2023-008.

Data Collection

The survey was delivered over a period of seven weeks from September to November 2023. Data were collected using Survey Monkey. KORE provided a contact list of 52 businesses. Each of these businesses were invited twice to schedule a time to meet with a Selkirk Innovates researcher to take the survey through a structured interview. Those who did not respond to this invitation, or who indicated they were too busy to schedule an interview, were provided with a link to the online survey so that they could take it at their convenience. Businesses who still did not take the survey were sent another follow-up (fourth) invitation. The survey was also promoted through a KORE newsletter, in social media posts from both Selkirk Innovates and KORE, and at a presentation made to attendees at the KORE Outdoor Rec Tech Summit in October 2023.

The structured interview approach was requested by KORE and supported by Selkirk Innovates because of the researchers' experience that this method generates higher quality data, particularly in providing detail where there are open ended questions. In interviews, respondents can request clarification on certain questions, or provide more detailed answers than they would in written form.

The survey was completed confidentially, with KORE not having access to the names of respondents, their businesses, or any data provided by individual businesses. In the results, data have been aggregated to protect the confidentiality of respondents.

Data Analysis

Raw data from Survey Monkey were downloaded, reviewed, and modified where necessary to ensure that the responses were categorized correctly by the respondents and therefore that the tallies were accurate. For example, in the question asking about business activities, there was an option for respondents to select 'other' and describe the business. Some of the descriptions matched existing categories, so those responses were recategorized accordingly. Open ended questions were coded using a similar thematic coding process as described in the 'Data Analysis' section for the KORE Regional Roundtables (see above). Results were then summarized as tables and graphs. Analysis methods specific to individual questions are described in the 'Results' section below.

RESULTS

KORE Regional Roundtables

The following section provides quantitative and qualitative summaries of the six roundtables held in June 2023. The following number of participants attended each roundtable:

- Nelson: 20
- Trail: 11
- Invermere: 10
- Revelstoke: 7

- Cranbrook: 14
- Fernie: 10

There are several considerations to be mindful of when interpreting the results:

1. Results are generally presented by the number of references made to each code/theme during a roundtable session. It is important to keep in mind that the number of code references is simply an indicator of how often that issue was discussed during a point-in-time conversation. While the number of references can indicate awareness and importance of a topic, the number of references alone does not necessarily reflect the level of importance of an issue is to the group. For example, where a group may be unaware or minimally aware of an issue, regardless of its importance it will not be reflected in the thematic analysis.
2. Tallied references to a code/theme may be either positive or negative. For example, under the 'reshoring manufacturing' code (see the "What does a Strong Sector Look Like?" section), there were many comments about how this is an important goal, and also many comments about how this is an unrealistic goal given the current state of manufacturing in the region. In circumstances where this split is notable, there is further explanation provided in the analysis that follows the data summary (graph) provided for each question below.
3. Coding references are generally analyzed according to the guiding question that the participant was responding to during the roundtable discussion; however, many codes have thematic relationships to other codes that are analyzed in relation to a different guiding question. As such, the results for these themes should be considered together. Some of the coding relationships that the research team identified include:
 - a. 'Shared space' (under "What Should KORE do to Help KORE Businesses?") and 'Sufficient supportive infrastructure' (under "What does a Strong Sector Look Like?")
 - b. 'Engagement with government' (under "What Should KORE do to Help KORE Businesses?") and 'Government awareness' (under "What does a Strong Sector Look Like?")
 - c. 'Funding and financing' (under "What Should KORE do to Help KORE Businesses?") and 'Investment' (under "What does a Strong Sector Look Like?")
 - d. 'Training, coaching, and business skill development' (under "What Should KORE do to Help KORE Businesses?") and 'Fill in gaps in business support and coaching' (under "What is Needed to Grow a Strong Sector?").

Summarized results for all codes are provided in Appendix C and copies of all coded notes have been provided to KORE.

One Word to Describe KORE

When roundtable attendees were invited to share one word to describe KORE, common terms used included "network" (6 instances), "collaboration" (4), "cool" (3), and "community" (3). All words were assembled into a word cloud (**Figure 2**), with the most common words being presented in larger font.

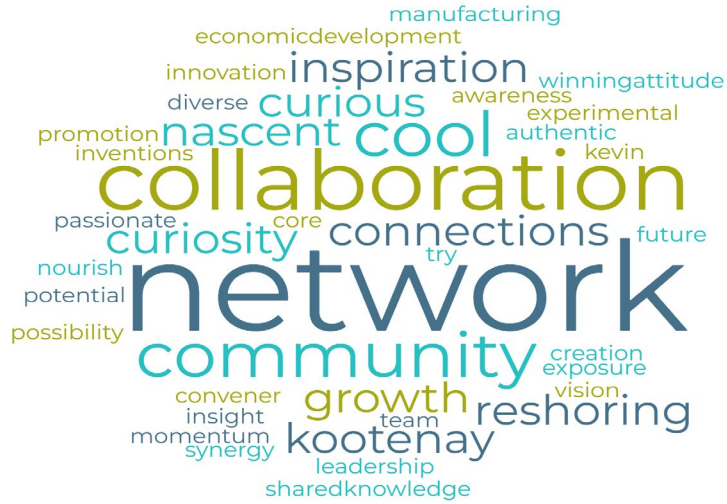


Figure 2: Word cloud of responses to the question, "what is one word you could use to describe KORE?"

How has KORE helped your business?

Overall results for this question are provided in **Figure 3**. Note that Cranbrook is not included in these results because no current KORE businesses/makers were present at that roundtable.

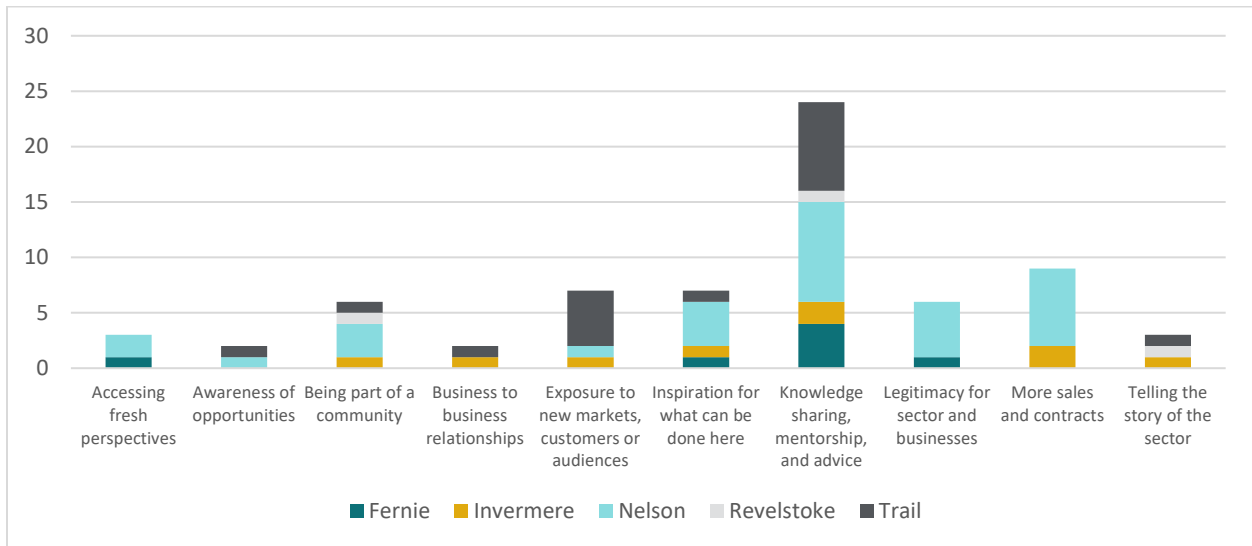


Figure 3: Number of references to themes identified from discussion around the question, "how has KORE helped your business?"

The theme of ‘knowledge sharing, mentorship, and advice’ is prominent in the results (24 references across all communities). Participants spoke often about the value of sharing experiences or advice on business challenges. Many told how they had benefitted from another KORE business being open and willing to share, and some mentioned how this was especially helpful when they were attempting to implement a new business activity that was beyond business as usual. The quote, *“a rising tide floats all boats”* came up several times, and one participant shared that *“KORE helps you grow the comfort zone of your business”*. Multiple participants indicated that KORE had provided helpful introductions to other people or organizations operating in the economic ecosystem. The Selkirk Technology Access

Centre (STAC) was identified as an organization that facilitated knowledge sharing and advice that was particularly helpful to organizations as they grew their experience with manufacturing equipment or brainstormed product solutions. A few respondents mentioned that being a mentor has been helpful for them, in that the process allows them to give back to the community and feel less isolated.

The themes of ‘more sales and contracts’ (9 references) and ‘exposure to new markets, customers, or audiences’ (7 references) were also prominent in the data. The 2022 Maker’s Market and Summit in Kimberley were identified as good examples of how KORE has helped businesses grow their reach. A couple participants also mentioned KORE’s video series as a useful sales tool.

Several participants mentioned that collaboration through the KORE network provides ‘inspiration for what can be done here’ (7 references), both in terms of growing awareness of the diversity of products sold by Kootenay makers and providing motivation for youth looking to start a meaningful career in the region.

Finally, ‘being part of a community’ was a benefit highlighted by 6 roundtable attendees. Participants appreciated that KORE fosters a culture that helps businesses feel like they are part of a group of like-minded organizations. This has links to the ‘knowledge sharing’ theme because many makers believe the community has an ethic of mutual support.

How *could* KORE help your business?

Each roundtable had an extensive discussion about this question. Results are summarized in **Figure 4**.

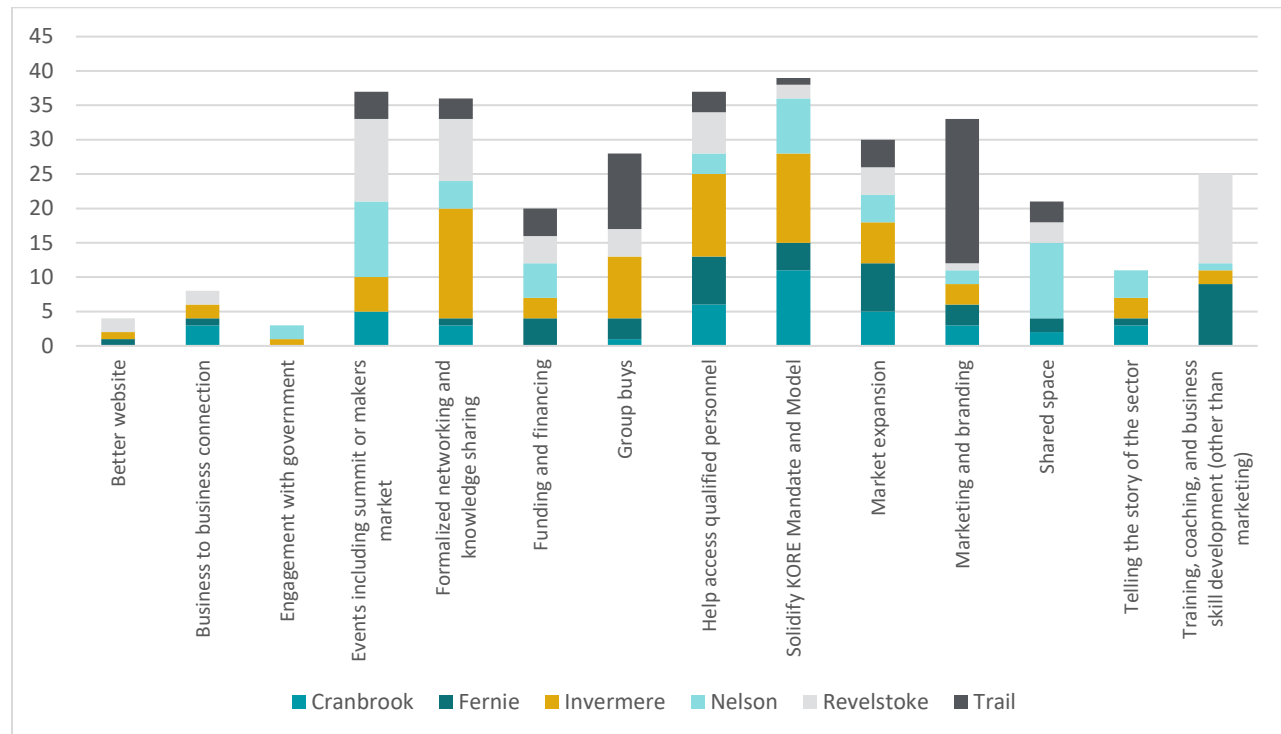


Figure 4: Number of references to themes identified from discussion around the question, "how could KORE help your business?"

The most discussed theme for this question was ‘solidify KORE mandate and model’ (39 references). Most of these references (31) were about the need to better define the KORE brand and the values that

are attached to the organization. Some businesses questioned whether they share the same values. There was discussion about whether there is a need to better define who is “in” or “out” of the KORE network, and what the deciding criteria would be for membership. No firm recommendations came forward, but some of the questions that emerged were, “should quality be a defining factor?”, “does business size matter?”, “should KORE members adhere to a certain way of doing business?”, and “does it matter where the products are made?”. Overall, there was an emphasis on the need for KORE to primarily serve small businesses, although this conflicts with some of the comments made during the “What does a strong sector look like” section about flagship businesses being a defining factor. Participants also discussed challenges with the “outdoor rec tech” phrase, given that it is not common terminology outside of the KORE network.

The next most common theme was ‘events including the annual rec tech summit or the maker’s market’ (37 references). Participants generally encouraged continuation of past events held by KORE, especially the Outdoor Rec Tech Summit, as these events help with the objective of expanding markets and building opportunities to engage with customers. There was encouragement to consider moving the summit to different communities, and some tension about whether it should be small and locally-focused or a larger event that attracts attendees from other regions. Beyond the Summit, there was also discussion of KORE attending larger trade shows to help promote Kootenay makers, and a few mentions of opportunities to host collective demo days. Finally, there was some discussion, especially at the Revelstoke event, about the possibility of hosting in-person casual meetups or tours of a maker’s facility.

‘Help to access qualified personnel’ was also referred to 37 times. There were two prominent sub-themes under this category. The first was focused on the possibility of developing a directory of vendors that KORE businesses can draw on for support. Participants shared that outsourcing elements of their work is necessary, but it can be challenging to source a vendor that is a good fit. Some thought that KORE could “pre-vet” potential vendors for quality of product, knowledge of the sector, and alignment with common values among KORE businesses. Some of the specific vendor services mentioned were marketing, web design, CAD, and injection molding. The second sub-theme was student employees. Businesses were open to providing employment/learning opportunities to students, but the process of finding and hiring the students needs to be easy. Some spoke of their success with student hires, while others mentioned they did not have a good experience. There were several references to the opportunity to work with local colleges to build capacity through student engagement (e.g., as product testers) and development of training programs that serve the needs of the sector.

Under the theme of ‘formalized networking and knowledge sharing’ (36 references), participants encouraged KORE to expand the valuable contributions it has already made to the sector. There was interest in continuing the type of networking and learning that happens at the summit throughout the year. Many thought that an online asynchronous forum of some sort could help achieve this goal, though some also cautioned that there needs to be an incentive for businesses to participate (i.e., they cannot just help other businesses solve problems) and the platform should be based on something that most businesses already use. Participants also encouraged KORE to continue the direct facilitation of business-to-business relationships that it already does. “Mastermind” or mentoring groups were also mentioned in a couple communities, and participants thought these would be most helpful if they were organized by categories that matter to businesses (e.g., type of product, location of market).

‘Marketing and branding’ (33 references) was another common theme that was especially prevalent at the Trail roundtable. Among participants, there was general agreement that marketing is something businesses need help with. One participant summarized a common perspective from this discussion as follows: “[Marketing is] my weak point. I’m way better at being a nerd. I’ve never been an Instagram guy. Not very good at ‘Hey look at me!’ But it’s essential. As good as the product is, if no one knows it exists, you’re never going to sell it.” There was some discussion of KORE helping individual businesses to access marketing support that is tailored to their unique products and markets, but there was also discussion of the value and potential of collective marketing.

Participants stressed a need for help with ‘market expansion’ (30 references) by facilitating opportunities to reach new potential customers. There was a particular emphasis on opportunities that would help build awareness of KORE businesses beyond the Kootenays, though there was also recognition that local markets still hold significant untapped potential.

Under the theme of ‘group buys’, there were two common suggestions. The first, discussed in most communities, was that KORE look into access discounted group shipping rates for participating businesses. The second suggestion, which was primarily discussed in Trail, was that KORE facilitate access to liability insurance for businesses that struggle to find suppliers with competitive rates.

One Word to Describe the Outdoor Recreation Technology Sector

When roundtable attendees were invited to share one word to describe the outdoor rec tech sector, common terms used included “authentic”, “inspired”, and “unique”, each with 3 references. All words were assembled into a word cloud (Figure 5), with the most common words being presented in larger font.



Figure 5: Word cloud of responses to the question, "what is one word you could use to describe the Outdoor Recreation Technology Sector?"

What Does a Strong Outdoor Recreation Technology Sector Look Like?

Summarized results for this question are presented in **Figure 6**.

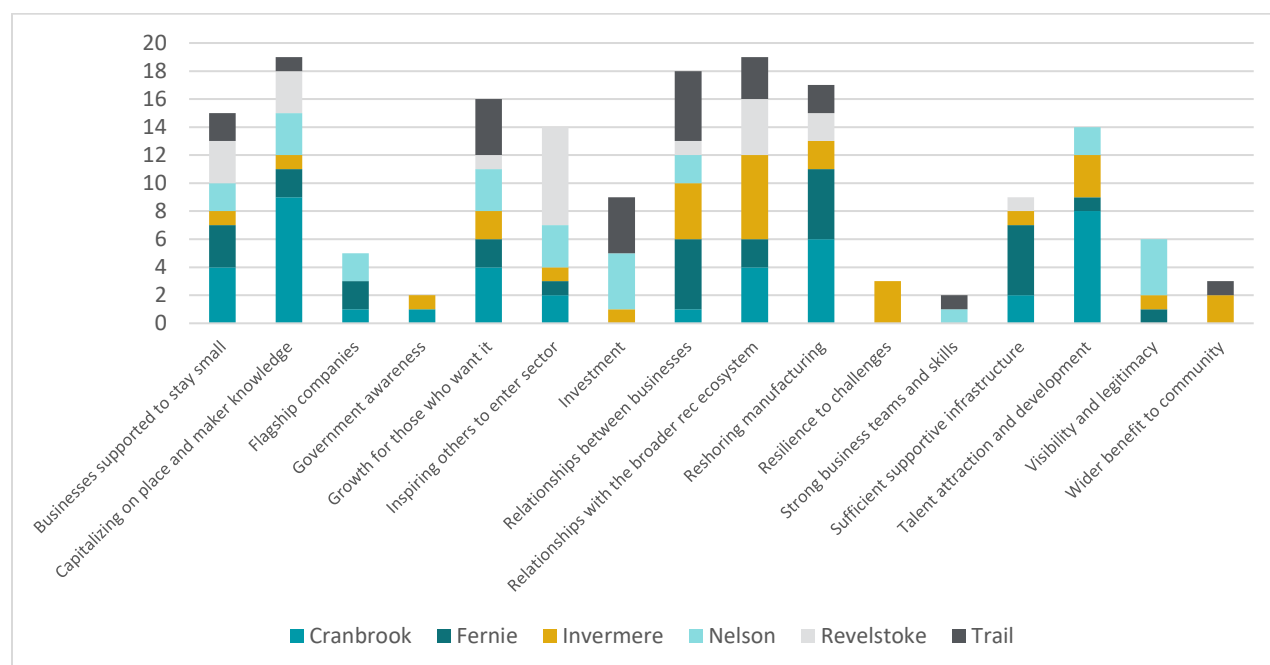


Figure 6: Number of references to themes identified from discussion around the question, "What does a strong outdoor recreation technology sector look like?"

One of the most prominent themes under this question was 'relationships with the broader outdoor recreation ecosystem' (19 references). Participants acknowledged that a strong outdoor recreation technology sector does not exist in isolation. The emergent cluster of KORE businesses has grown out of the fact that the makers are outdoor enthusiasts whose knowledge of a sport or activity is critical to their product's success. Relationships with the tourism sector were spoken of often, as some participants envisioned a future where exceptional outdoor experiences combine with high quality gear to put the Kootenays "on the map". Other stakeholders referenced by participants included academic institutions, local governments, environmental organizations, retailers, and economic development agencies.

Related to this was the equally common theme of 'capitalizing on place and maker knowledge' (19 references). As discussed above, participants recognized that one of the key distinguishing factors of the Kootenay outdoor recreation technology sector was that KORE businesses are making gear that is reflective of the Kootenay environment and culture. The quote "*we make because we do*" reflects a common sentiment of participants. Some envisioned a future where the Kootenays are known for craft gear in the way that the Okanagan is known for wine, and where hailing from the Kootenays is a badge of honour. Others cautioned that the Kootenays are not well-known outside the region, which could challenge the success of place-focused promotional efforts.

'Relationships between businesses' (18 references) were also noted as an important indicator of a strong sector. Participants acknowledged the spirit of 'co-opetition' in the local sector and spoke of the

potential benefits of partnerships that involve, for example, collaboration on product development, or sharing equipment and supplies.

‘Reshoring manufacturing’ was the next most prominent theme (17 references), especially at the Cranbrook and Fernie roundtables. There was roughly an equal split between participants who were supportive of the goal of KORE businesses manufacturing in the Kootenays, and those who believed that offshore manufacturing is vital to local businesses remaining competitive. Participants acknowledged that technological innovation is enhancing the efficiency and cost-effectiveness of local manufacturing, but that there are other important barriers (e.g., warehousing) that need to be removed before broadscale manufacturing can be a realistic goal for this region.

‘Growth for businesses who want it’ (16 references) and ‘support to stay small’ (15 references) were other common and related themes. There was a clear tension between a desire to see the sector grow, and the need to support the small businesses that currently characterize the sector to thrive while staying small. A few participants mentioned ‘flagship businesses’ as a key indicator of a strong sector, and there was recognition that it is important to push into new markets to be able to grow beyond a ‘lifestyle’ business. Some participants expressed that they want to grow only to the point where the business is sustainable and provides a decent living for the owners, but that business support services are not available to these types of organizations. Multiple participants shared their opinion that a sector characterized by many small businesses has advantages: *“[It’s important to] have people in the funding stream realize that 50 small entities employing two people each might have more resilience than one company providing 100 jobs.”*

What is Needed for a Strong Sector?

Results for this question are summarized in **Figure 7**.

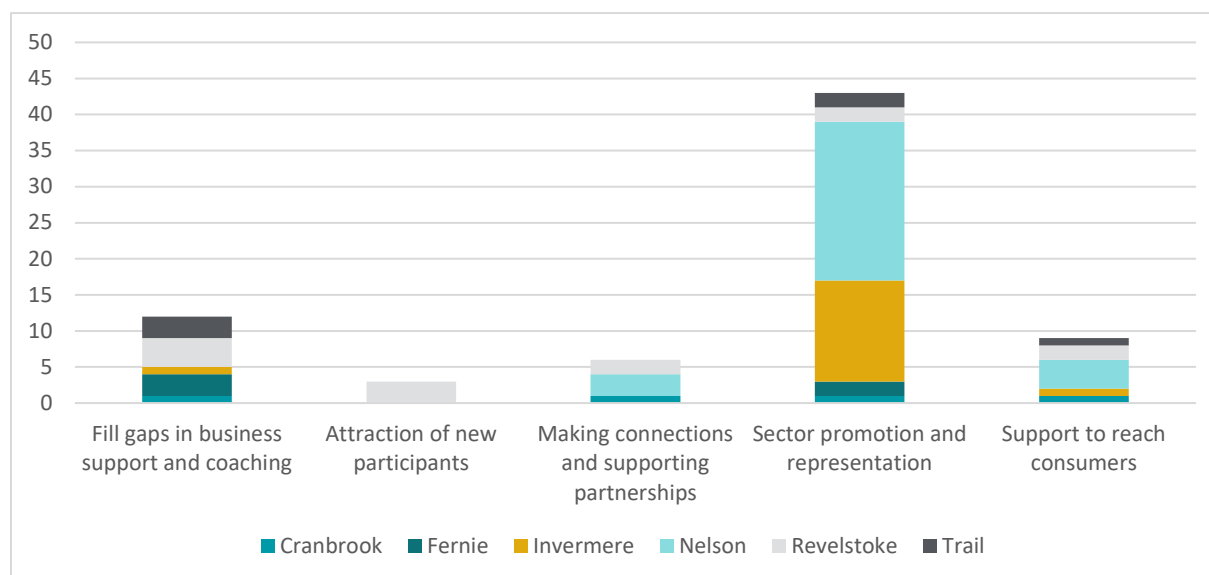


Figure 7: Number of references to themes identified from discussion around the question, "What is needed to grow a strong sector?"

Responses to this question were dominated by the theme, ‘sector promotion and representation’ (43 references), with the most important sub-theme being ‘demonstration of impact’ (19) and a related

second sub-theme being ‘building awareness and support among all levels of government’ (9). Participants mentioned the importance of KORE to establishing a single industry voice (potentially by serving as an industry association) to communicate what is needed by the sector. In Nelson, especially, there was discussion about the need for tools or collateral to support the goal of building awareness among decision-makers (e.g., policy briefs, stories), with the goal being to have government recognize the size and value of the sector through targeted financial support programs, tax incentives, etc. Participants stressed that evaluation of impact should include considerations beyond conventional economic metrics, like the ‘soft’ benefits enjoyed by owners of small lifestyle businesses, or the health benefits that are enabled by participation in outdoor recreation.

Another prominent theme under this question was ‘fill gaps in business support and coaching’ (12 references). As mentioned above, a few participants feel there is a lack of services for owner-operated businesses, or businesses who don’t want to scale up. There was also discussion of a need for additional accelerator/incubator services that fill the gap between start-up and well-established businesses. Based on comments made from representatives of economic development agencies, it was also clear that some businesses may have incorrect or incomplete information about the support services offered and who they are for, highlighting an opportunity to better communicate existing programs to the KORE network.

The roundtable facilitator prompted discussion under this question with the additional question, “Who should be involved in efforts to strengthen the sector?”. Coding results for this question are summarized in **Figure 8**.

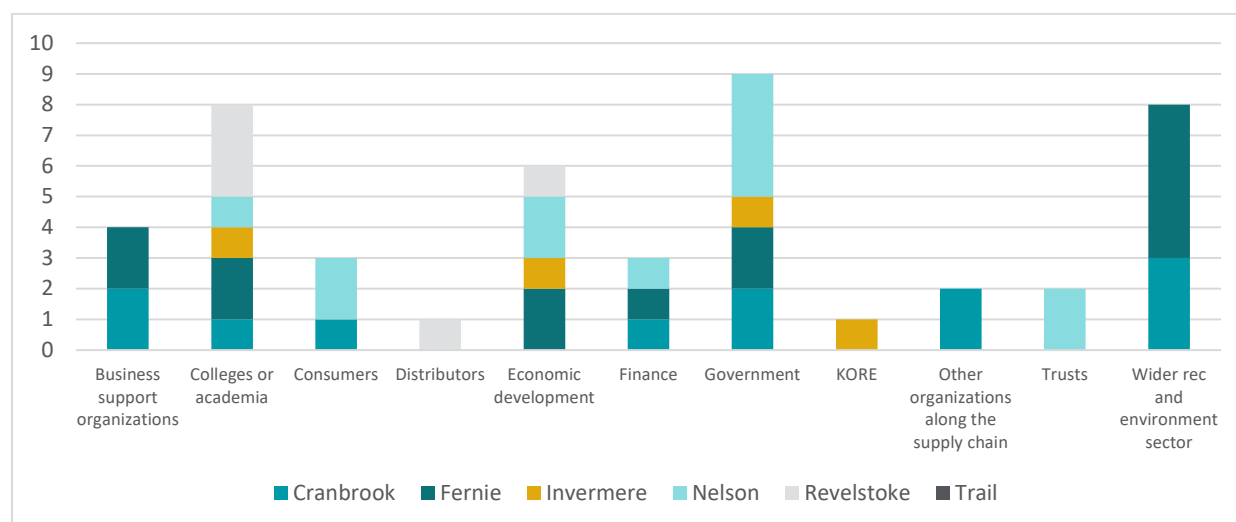


Figure 8: Number of references to themes identified from discussion around the question, “Who should be involved in efforts to strengthen the sector?”

Participants felt that development of a strong outdoor recreation technology sector would require participation from various levels of government (9 references), colleges or academia (8), the wider outdoor recreation ecosystem, including the environment sector (8), economic development agencies (6), and business support organizations like marketing and IP protection firms (4), among others.

Sector Survey

The survey received a total of 40 responses; however, 11 of those included no information beyond the initial question asking for consent to participate. Therefore, the effective number of responses is 29, representing 56% of the 52 businesses included in KORE's contact list. Included within the 52 participating businesses are a small number of businesses that are not headquartered within the Kootenay region but have ties to the area. Results for each question are provided below. A summary of all survey data is included as Appendix D. Results below are primarily provided in percentages. When using results, it is important to exercise caution when interpreting percentages due to the small numbers involved. Although the relative response rate was strong for this survey (which should indicate strong potential for good correlation between the survey sample and the full population), the number of respondents is still small (which results in a larger margin of error). In the data that follow, a result of 10% refers to approximately three businesses.

Business Location

To get a sense of the profile of the businesses participating in the survey, respondents were asked to provide the first three digits of their postal code. The highest percentage of respondents (45%, 13) are in the V1L area (Nelson and area, including south to Salmo and east along the West Arm of Kootenay Lake to Balfour) (**Figure 9**). The VOA (Columbia Valley from Invermere to Mica) and VOE (Columbia Shuswap area from Revelstoke to Kelowna/Kamloops and north to Wells Gray) areas each had 21% of respondents (6), and VOB (southern East Kootenays including Creston, Cranbrook, Kimberley, Canal Flats and the Elk Valley), and VOG (Beaver Valley, Rossland, Slocan Valley and north end of Kootenay Lake) each had 7% (2). The remaining 21% of businesses (6) were each from postal codes with only one response and have therefore been combined to protect confidentiality.

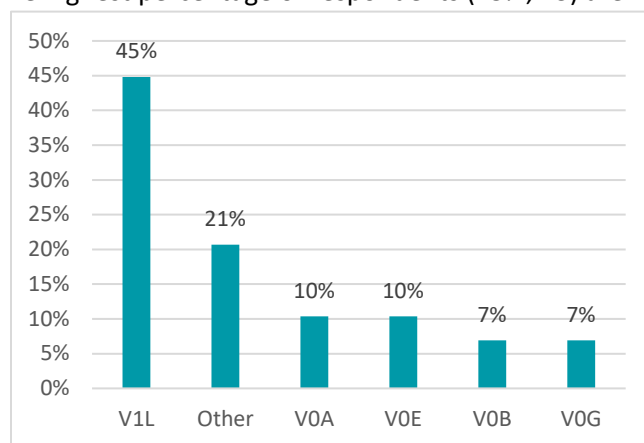


Figure 9: Percentage of respondents by postal code (n=29)

Business Activities

Businesses classified themselves according to a set list of activities (**Figure 10**). As they had the option to select more than one activity, the totals add up to more than 100%. Product development/design was selected the most often (79% of responses), followed by gear manufacturing - hard goods (52%) and outdoor recreation-related technology (41%).

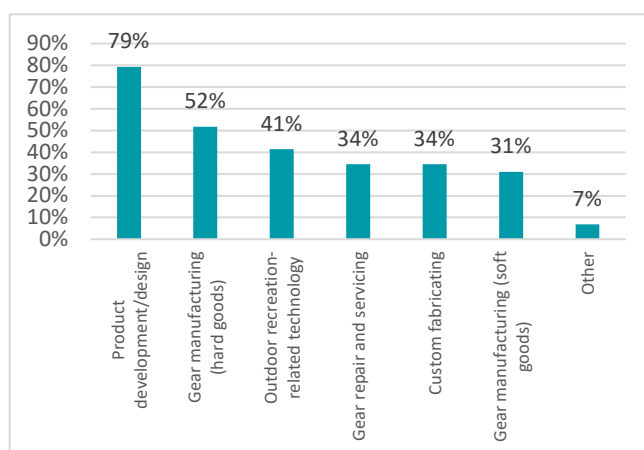


Figure 10: Percentage of businesses by type of business activity (n=29)

Related Outdoor Recreation Activities

When asked to indicate which outdoor recreation activities best align with their business, respondents most often chose the ‘outdoor lifestyle’ category (52% of respondents), which was provided as an option to encompass businesses that may not have a specific target activity (e.g., soft goods manufacturing) (**Figure 11**). Other common choices include bicycling (45%), skiing/snowboarding (45%), and tent camping (28%). Respondents had the option to select more than one category for this question, so the total percentage of businesses is higher than 100%.

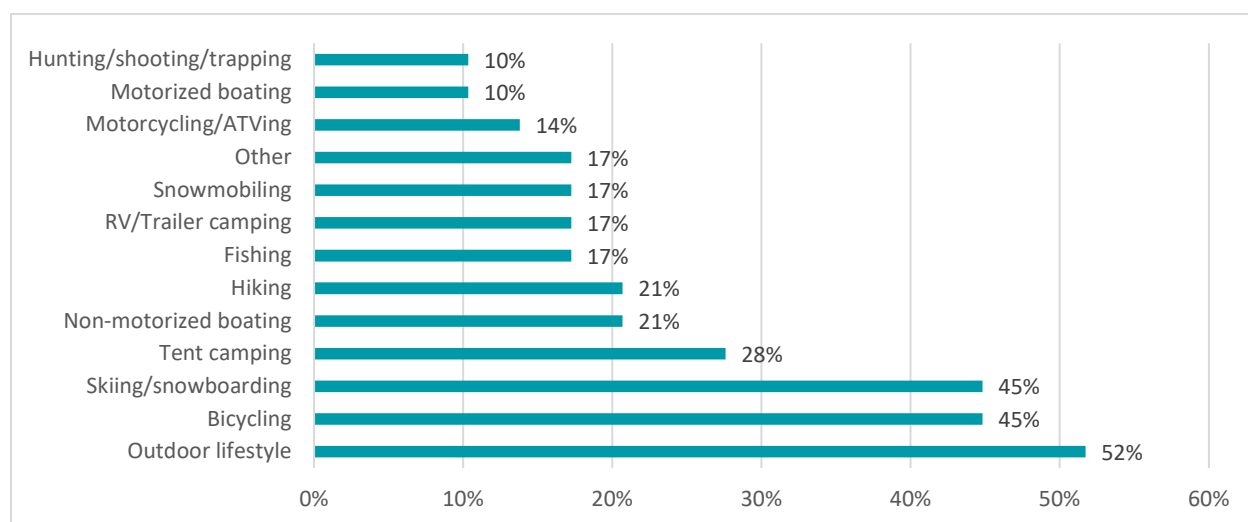


Figure 11: Percentage of businesses aligned with various outdoor recreation activities (n=29)

Home Based Business

Just over half of respondents (59%) indicated that their business is based out of their home (**Figure 12**).

Length of Time in Business

Respondents have generally had multiple years in business but have not yet reached the maturity phase (**Figure 13**). Thirty-one percent of businesses have been operating for between five and nine years, and a similar number (28%) have been in business for between 1 and 4 years. A few more businesses (24%) have been operating for more than 10 years as compared to those who are very new (less than one year, 17%).

Number of Employees

The question asking about number of employees had interesting results given that, while most businesses are very small, with only a few

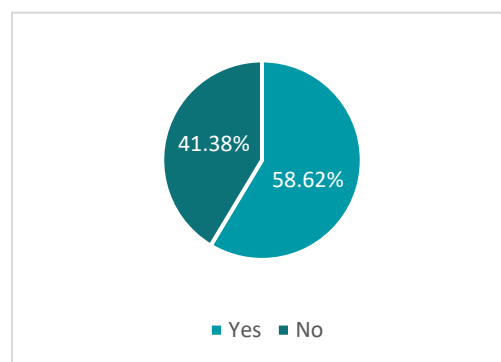


Figure 12: Percentage of respondents indicating their business is home-based (n=29)

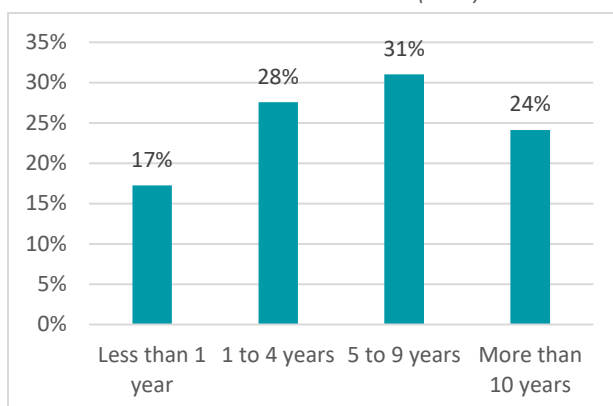


Figure 13: Percentage of respondents by length of time in business (n=29)

employees, there are a few outlying businesses with many full-time employees.

In terms of full-time employees, the median number of employees among respondents was one (**Figure 14**). Nearly half of respondents (45%) reported having no full-time employees, not even themselves. Of these respondents, most reported having one or two part-time or casual employees. Thirty-eight percent of respondents reported having one or two full-time employees.

In terms of part-time employees, again, the median number of employees was one, and again, almost half (45%) reported having zero. Another 45% reported having one or two.

The vast majority of participating businesses rarely employ casual/on-call or seasonal employees, or contractors who serve in employee-like positions (e.g., someone a business would regularly hire for marketing or design services).

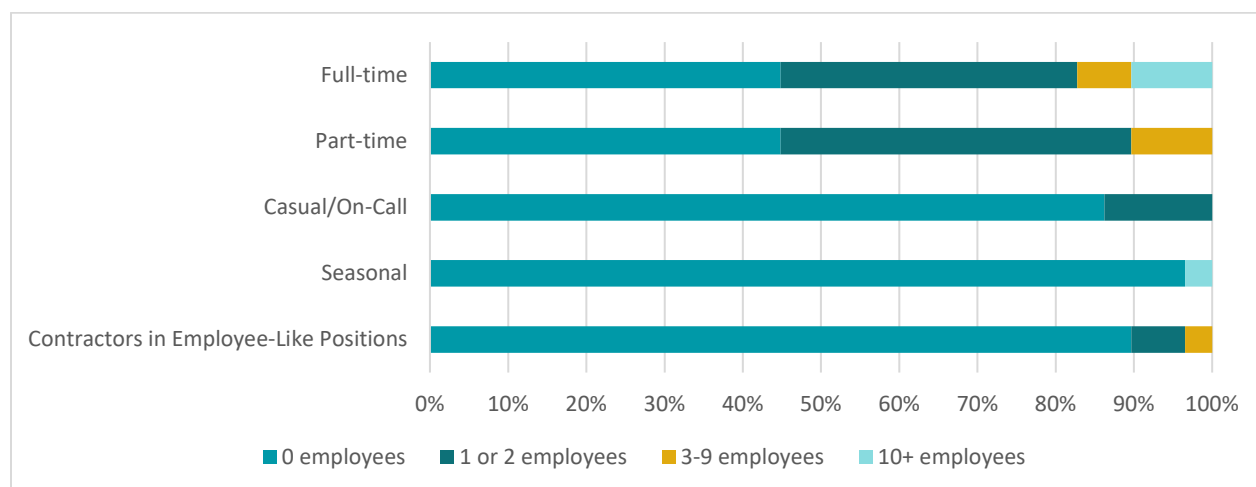


Figure 14: Percentage of respondents by number of employees in various employment categories (n=29)

Annual Revenue

Five businesses elected not to answer this question. Of those who answered, almost half (46%) are very small businesses with an annual revenue of less than \$50,000 (**Figure 15**). Thirty-eight percent of respondents fell into ranges between \$50,000 and \$1,000,000, and 17% were larger businesses with an annual revenue of over \$1,000,000.

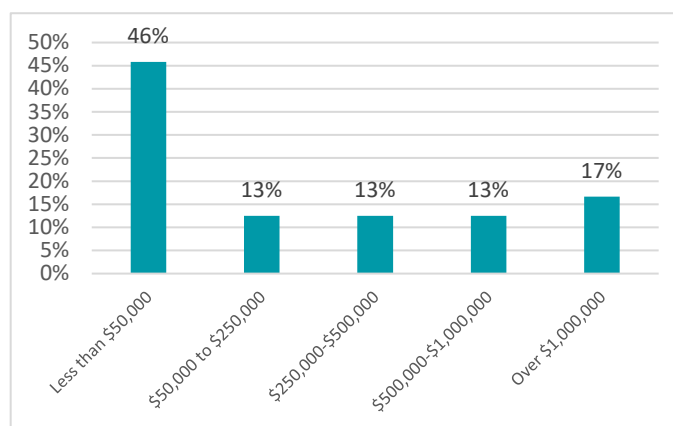


Figure 15: Percentage of respondents by category of annual revenue (n=24)

Location of Business Processes

Businesses were asked to indicate where key business processes take place, and they had the option to select more than one location for each process. Across all types of processes, the most common location was “in house” (**Figure 16**). The business process that is most commonly contracted out is manufacturing, with 66% of businesses indicating that at least some of their manufacturing does not happen in house. The location of

contracting businesses depends on the process in question. For product design and marketing, the most common location of contractors is within the Kootenay region; however, for distribution, contractors are most commonly located elsewhere in Canada, and for manufacturing and sales, contractors are usually located in other countries.

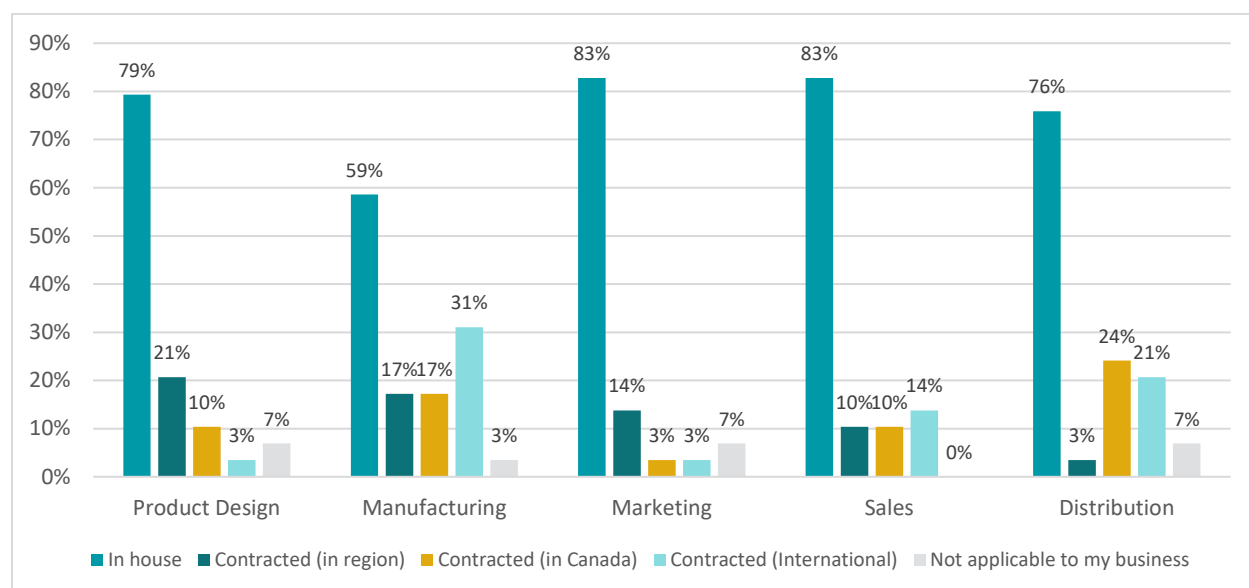


Figure 16: Percentage of respondents by location of key business process (n=29)

Sales Channels

For this question, respondents ranked various sales channels by the importance of that channel to their business. Each response was assigned a value out of six (ranked first = 6, ranked second = 5, etc.), and the total for each channel was summed across all responses to generate the 'total weight' for each channel. This value was then divided by the number of respondents (26) to generate the 'average weight' for each channel. The most important sales channel to

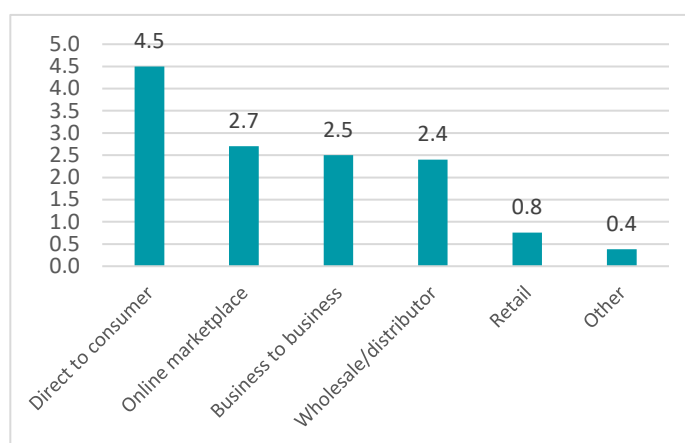


Figure 17: Most important sales channels by average weight (n=26)

respondent businesses is 'direct to consumer', with an average weight of 4.5 (**Figure 17**). Fourteen of the 26 respondents indicated this channel is the most important to their business. 'Online marketplace' and 'business to business' were the next two most important sales channels, with average weights of 2.7 and 2.5, respectively. 'Retail' is a relatively unimportant channel for respondents, with zero indicating this is their most important channel, and 17 indicating this channel is not applicable to their business (see Appendix D for the data table). A few respondents said that their business sometimes uses an 'other' channel for sales, and the only recorded response in the open-ended question asking for details on other channels was "events".

Location of Sales

Respondent businesses sell to markets across the globe; however, some markets are more important than others (**Figure 18**). All respondents indicated that Kootenay-based customers are responsible for at least a portion of their sales, with a range of 1% to 25% being the most prominent response. The Kootenays, along with other locations in Canada and the United States, appear to be the most important geographic markets for respondent businesses at this time. While some respondents indicated that they make some sales (between 1% and 25%) to markets in Europe, Asia, and other locations, these respondents were in the minority.

This question was skipped by 4 businesses, and many others did not fully answer the question, in that they only indicated which markets they sell to and did not indicate which markets make up 0% of their sales. For analysis purposes, these businesses were assumed to have responded “0%” for sales locations where they did not input a response.

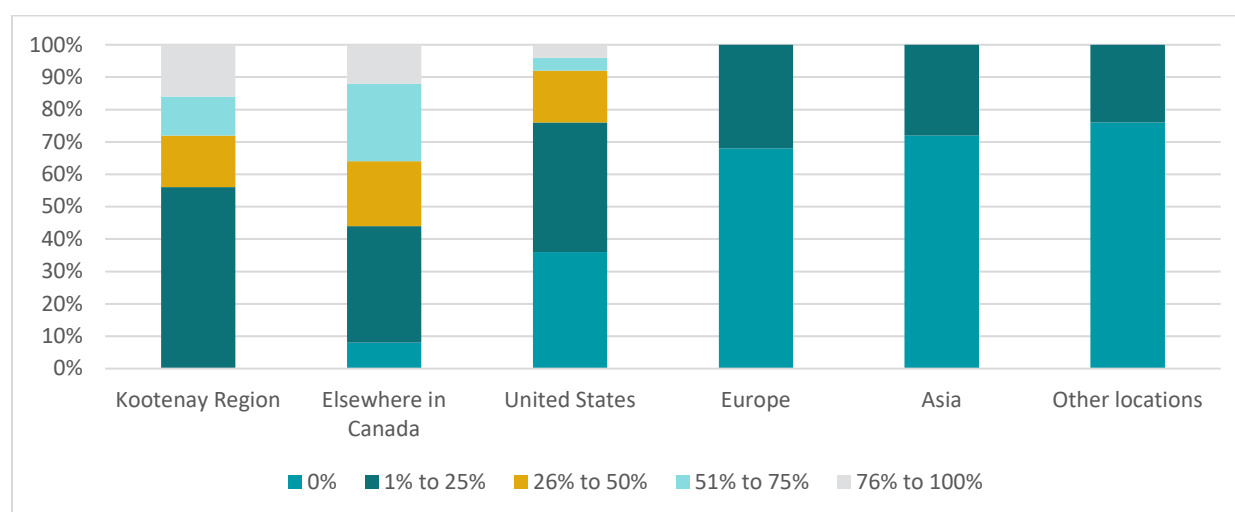


Figure 18: Percentage of respondents by component of sales made to various geographic markets (n=25)

Business Outlook

The majority of respondents (61%) expect their business to expand over the next three years, while 18% expect to continue operating at a similar size, and 11% expect to sell or transfer their business (**Figure 19**). Of the 11% of respondents who answered ‘other’ to this question, they indicated they either plan to begin production or close the business down.

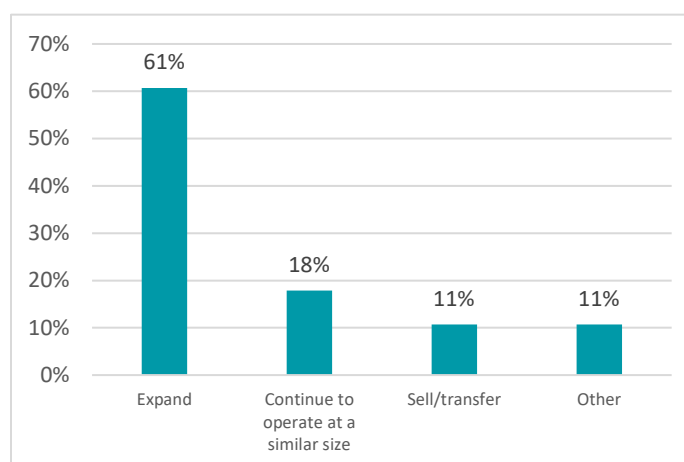


Figure 19: Percentage of respondents by outlook for business in next 3 years (n=28)

Business Growth

Respondents were asked to indicate their interest in growing the businesses, regardless of their business outlook. The vast majority (72%) indicated that they are 'very interested' in growth, with only a few businesses (7%) indicating that they are not interested (**Figure 20**).

For the 26 respondents who answered 'very interested', or 'somewhat interested' to this question, they were also asked what growth looks like for their business. This was an open-ended question with responses that were thematically coded. The most common theme in these responses was 'more sales' (46%). 'More diverse market' and 'larger product or service line' were other common themes, each accounting for 27% of responses (**Figure 21**).

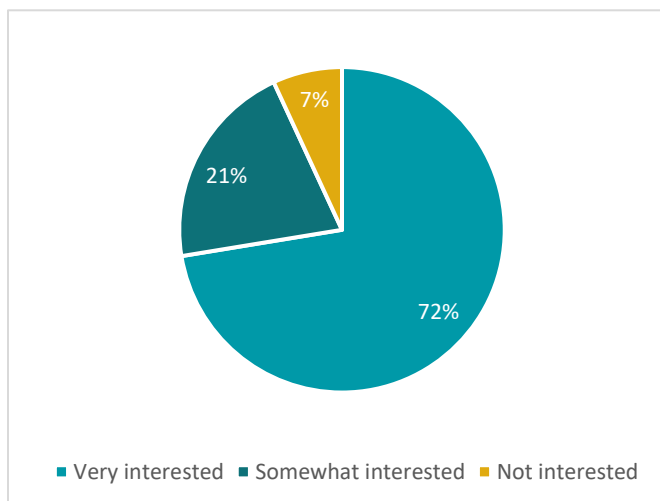


Figure 20: Percentage of respondents by level of interest in growing the business (n=29)

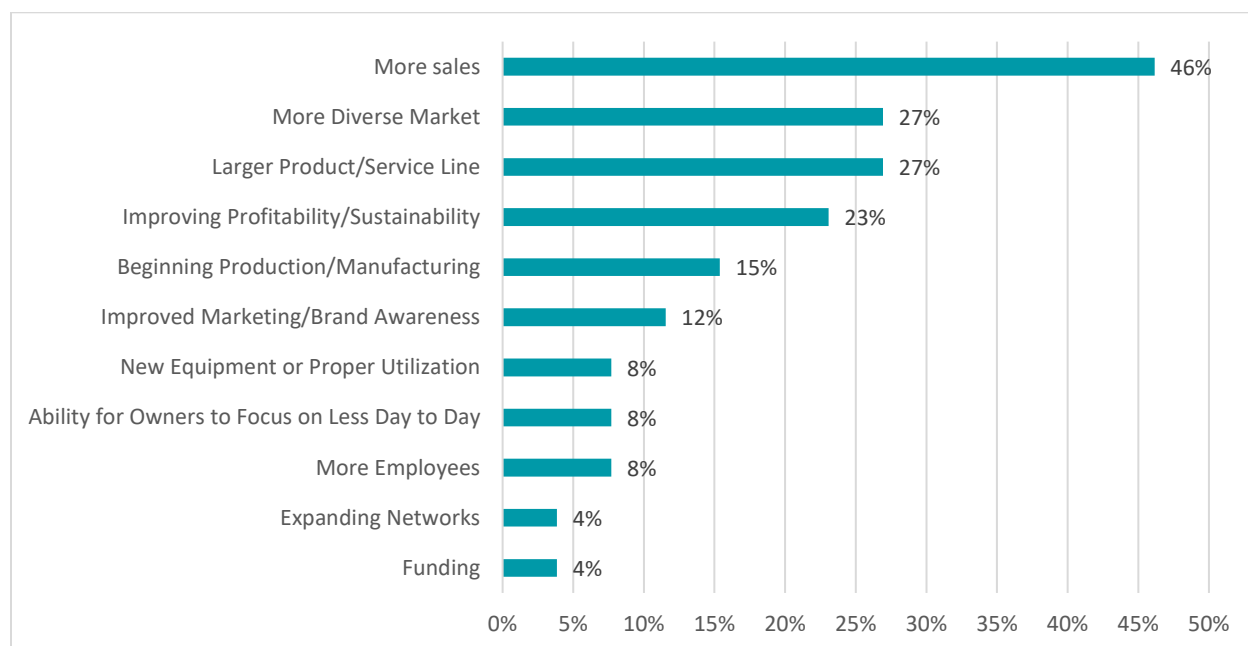


Figure 21: Common themes in open-ended responses to the question, "what does growth look like for your business?" (n=26)

Priority Activities for KORE

For the next four questions, respondents were asked to indicate how helpful various support programs would be to their business. Options for each question were developed based on suggestions made by attendees at the roundtable sessions. If a business indicated an activity would be 'very helpful', that response was given a weight of two, 'somewhat helpful' was given a weight of 1, and 'not helpful or not

applicable’ was given a weight of zero. The weights were then summed across all responses and divided by the number of respondents (28) to generate an average score.

COLLABORATION AND NETWORKING

Businesses responded favourably to activities that would link them to one another for networking and peer learning (**Figure 22**). A formal networking program, with an average score of 1.4, was received slightly better than the next most popular option, which would see KORE personnel continuing their current practice of facilitating direct connections between businesses when opportunities arise. In the comments section for this question, some of the responses echoed themes heard during the roundtables, including support for “mastermind” groups or in-person tours of businesses. One person also suggested KORE prioritize youth engagement, and another suggested a directory of KORE businesses that would allow them to contact each other. It was not clear how this would differ from the directory already on the KORE website.

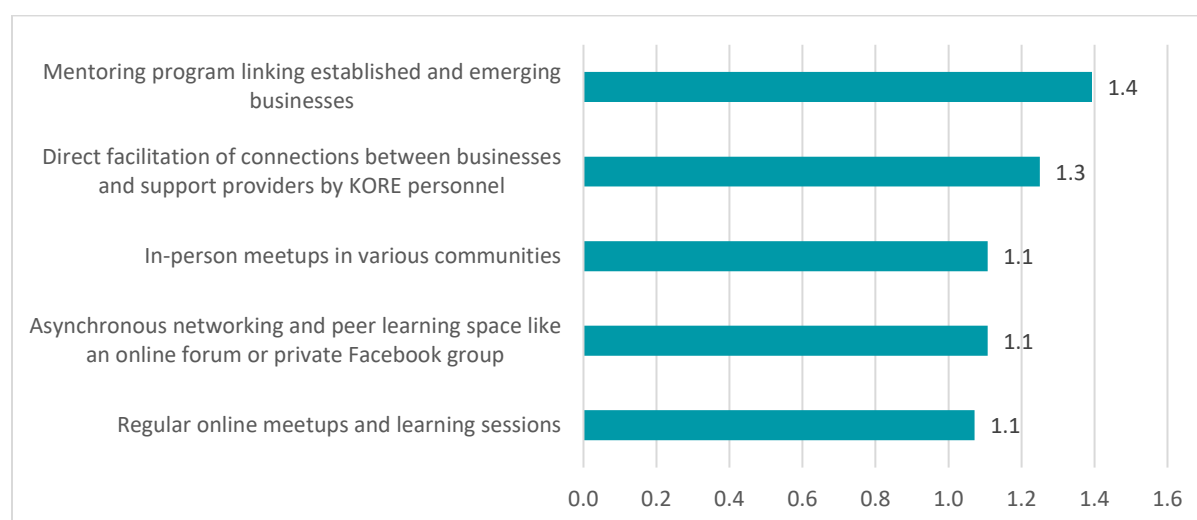


Figure 22: Average score for various options for KORE support under the theme of "collaboration and networking" (n=28)

BUSINESS SERVICES

Under the theme of ‘business services’, individualized marketing support and coaching (average score of 1.4) edged out group marketing services (1.3), but both options were generally well-received with only five businesses indicating that either of these options would not be helpful (**Figure 23**). A ‘database of pre-vetted business service providers’ and ‘shared access to student employees’ were two other popular options under this theme, both with an average score of 1.3. The option of ‘discounted group insurance rates’ was polarizing—13 businesses indicated this would be very helpful, but 12 said it would not be helpful. Comments for this question also suggested group employee benefits (similar to what is provided by some chambers of commerce), business-to-business discounts, and an industrial makerspace for the East Kootenays.



Figure 23: Average score for various options for KORE support under the theme of "business services" (n=28)

Businesses who indicated that 'coaching for business activities other than marketing' would be helpful were asked to elaborate on their needs, recognizing that a variety of supports are already available to businesses in the region. A few common themes were present in the 17 responses to this question:

- Accounting/financial reporting: 4 responses
- General business development and operation: 2 responses
- Website development/maintenance: 2 responses
- Human resources: 2 responses
- Sales/distribution: 2 responses.

SALES AND DISTRIBUTION

Under the theme of 'sales and distribution', businesses responded most favourably to the idea of KORE representing Kootenay outdoor recreation technology businesses at industry trade shows (average score of 1.4) (**Figure 24**). The idea of creating a shared retail display was also well-received (1.2). In the comments for this question, one respondent suggested that KORE could help businesses connect with trade agents, another suggested that KORE could help businesses access the retail market, two suggested gathering related businesses and associations (e.g., a ski association, Avalanche Canada), another suggested KORE could help facilitate access to shared third party logistics help, and there was a final suggestion to facilitate more direct-to-consumer sales.

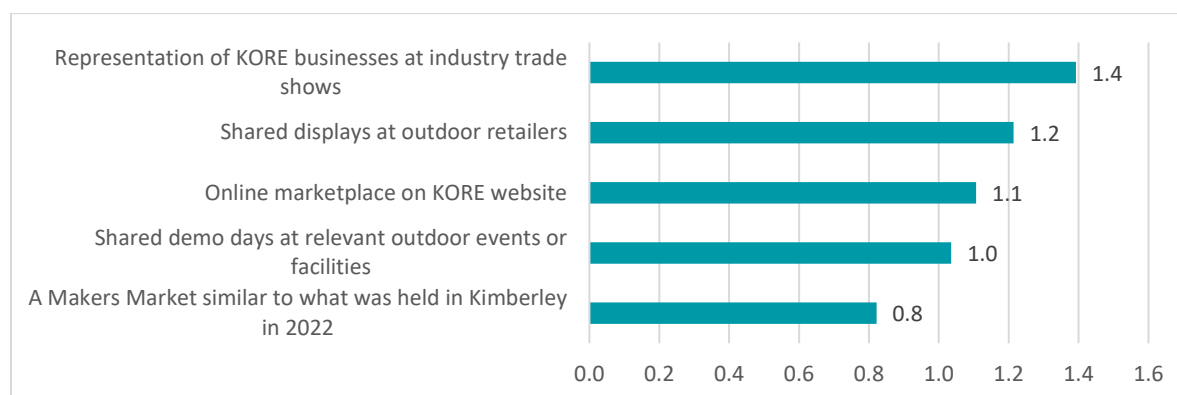


Figure 24: Average score for various options for KORE support under the theme of "sales and distribution" (n=28)

PROMOTION OF THE OUTDOOR RECREATION TECHNOLOGY SECTOR

Two options under the theme of ‘promoting the outdoor recreation technology sector’ scored the highest out of all options across all themes. These were ‘engagement of local and provincial government decision-makers’ and ‘work with tourism and recreational organizations to cross-promote products and services’, both with an average score of 1.5 (**Figure 25**). All options under this theme were relatively well-received, suggesting this is a priority area for KORE’s work going forward. In the comments section, there was a suggestion to expose educational institutions to products made by KORE businesses.

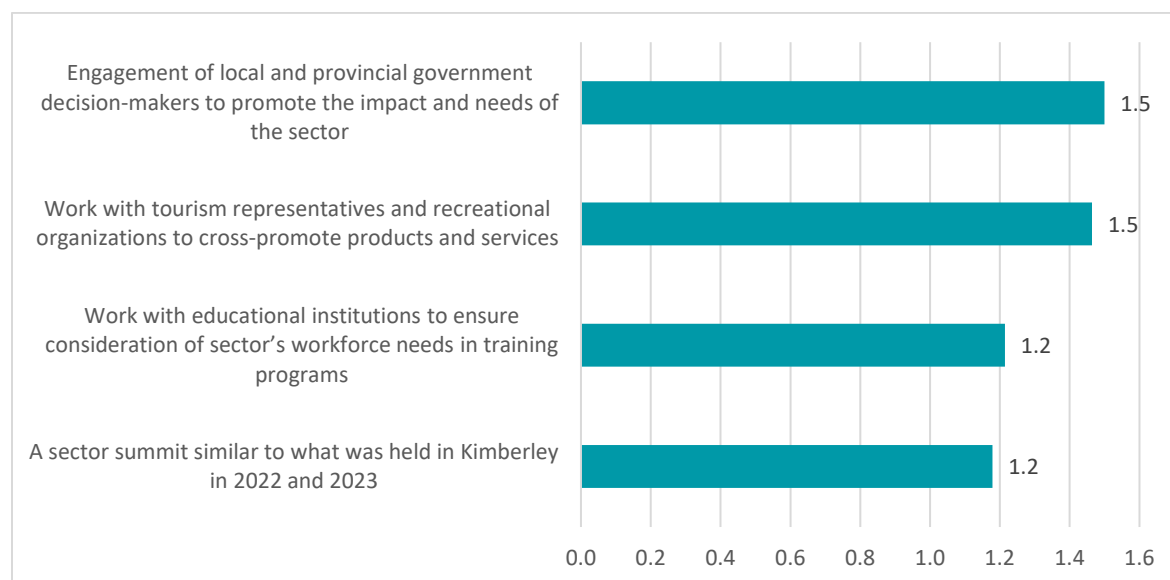


Figure 25: Average score for various options for KORE support under the theme of "promotion of the sector" (n=28)

Business Values

Due to the emphasis during the roundtables on the importance of KORE better defining its mandate and model, survey respondents were asked to weigh in on the values that they think define KORE businesses. All suggestions scored relatively well, with the majority of respondents indicating that all of the listed values align with businesses in the sector (**Figure 26**). However, the values that scored the highest were ‘reflective of the Kootenay recreation culture and environment’ (93%), ‘unique, niche, or special products’ (89%) and ‘focus on quality’ (89%). A few respondents suggested other values beyond those listed that could be considered. These included: community engagement (2 respondents), collaboration (1) and a focus on sustainability/ecological footprint (1).

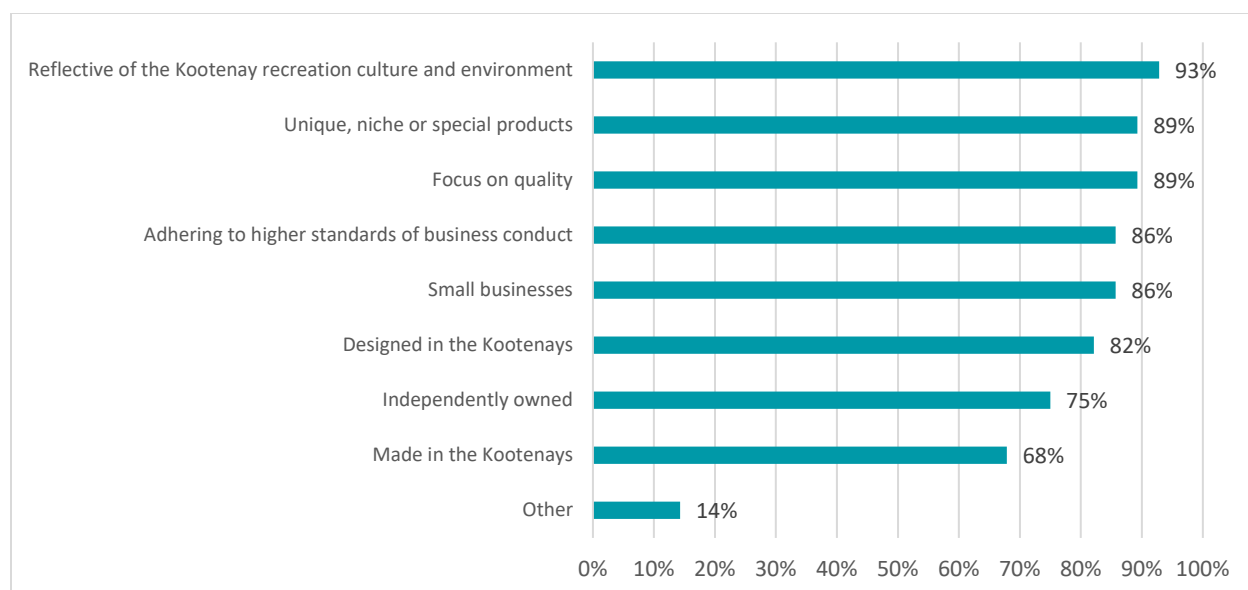


Figure 26: Percentage of respondents that think certain values define KORE businesses (n=28)

RECOMMENDATIONS FOR NEXT STEPS

When reviewing the results of the regional roundtables alongside the results from the survey of KORE businesses, several areas stand out as potential future areas of focus for KORE. These are presented below in no particular order.

- Supporting networking and mentorship
 - o During the roundtables, many participants mentioned how helpful KORE's efforts have been to connect sector businesses through informal introductions and more structured forms of networking like the annual summit. A few also mentioned how mentorship from other KORE businesses has helped them to overcome challenges, including a sense of isolation that can come with running a small business. The survey confirmed that there is strong interest in KORE continuing its informal efforts to connect the network, as well as development of a more formal mentorship program or set of mastermind groups. An asynchronous online network may also be an option, though in the survey, this was not received as favourably as network-building activities that would be more intentional in the types of businesses they connect.
- Supporting KORE businesses' personnel challenges
 - o Developing and maintaining a directory of pre-vetted vendors
 - This option was well-supported in both the roundtables and the survey. KORE could issue a "Request for Qualifications" to networks of marketing companies, web developers, IP support providers, etc. The RFQ could ask respondents to identify how their offerings align with the needs of KORE businesses, and to provide references from similar companies.
 - o Facilitating shared student engagement
 - During the roundtables, some participants spoke of the value of working with student employees, while others shared that they had experienced challenges.

There was agreement that regardless of the outcome, it can be difficult to navigate the red tape of student employment programs, and few businesses would have the capacity to take on a fulltime intern or employee. The option of 'shared access to student employees' was favourably received in the sector survey. Selkirk College has implemented a program with Living Lakes Canada that may be of interest to KORE. Using grant funding, Living Lakes partners with Selkirk to host one or two students each summer. Over the course of the student's work term, they work on several small projects for various watershed groups that partner with Living Lakes. Each group submits a project description before the summer, and Living Lakes works with Selkirk to select the projects that are best positioned for student involvement.

- Support related to marketing
 - At the roundtables, many businesses expressed a need for help with marketing. There were mixed opinions on whether this support would be most effectively delivered as one-on-one training/services for individual businesses or a group undertaking that promotes KORE businesses as a whole, similar to the recently launched 'Kootenay Approved' campaign. Both of these options were well-supported in the sector survey.
- Supporting businesses with market expansion
 - Roundtable participants expressed a need for help with expanding their customer base, particularly outside of the Kootenays. In the survey, businesses also acknowledged that market expansion is a key factor in their growth plans. A KORE presence at out-of-region trade shows, similar to the recent attendance at the Banff Mountain Film Festival, may help to expand the market of KORE businesses. Another option is shared displays at outdoor retailers. Though retail is not currently an important sales channel for survey respondents, there is some interest among KORE businesses in growing their retail presence.
- Facilitating group buys
 - KORE could investigate possible opportunities to support businesses in accessing preferred rates for shipping or liability insurance. However, activities on this theme should recognize that, while developing this support would be highly impactful for some businesses, there are many others for whom this is not applicable or would not be helpful.
- Promoting available business supports and filling gaps
 - During the roundtables, many participants shared that they are experts in their product, but not experts in running a business. Many survey participants also shared that business coaching would be helpful for them, though there was little agreement on specific support needs (with the exception of training in accounting/financial reporting). A first step for KORE on this theme may be to better promote the many business coaching services that are already available to the region, as some stakeholder participants in the roundtables shared that there are misconceptions and/or a lack of knowledge about these services. KORE could also communicate perceived gaps to business support providers to help them understand opportunities to increase engagement and/or improve programs.
- Refining KORE's mandate

- A desire to see KORE more clearly define its network and purpose was a strong theme in the roundtables, and some businesses were uncertain about whether KORE's values aligned with their own. There is an opportunity to refine "who is KORE" without being exclusionary, as the survey showed that there is widespread agreement on certain defining values, including being 'reflective of the Kootenay outdoor recreation culture and environment', which many roundtable participants agreed is a strength of the sector.
- Increasing the visibility of the sector
 - Roundtable participants shared many benefits that could come from efforts to increase awareness of KORE businesses among potential customers (more sales), government (supportive policy), and other businesses or individuals who are considering either starting a new business or relocating their existing business to the Kootenays (sectoral growth). Events were recognized as one of the best ways to increase visibility, especially the annual KORE summit. While the Maker's Market was spoken of positively by a few roundtable participants, it was not ranked as one of the more helpful potential activities in the sector survey.
- Stewarding the sector's ecosystem
 - Results from the survey demonstrate that businesses know the sector needs strong stakeholder relationships to be successful. Roundtable participants spoke of the potential benefits that could come from efforts to better connect KORE businesses with economic development agencies and all levels of government. Academic institutions were also highlighted as important partners given the role they play in training the regional workforce, as well as the potential synergies that exist between certain programs (e.g., the Mountain Adventure Skills Training program at College of the Rockies) and KORE businesses. The link to tourism was also acknowledged. This link is important given that "outdoor recreation" is most often discussed within the perspective of activities and assets, and is often associated with tourism related to these experiences. Linking the emergent outdoor recreation manufacturing sector with the established outdoor recreation activity sector presents an opportunity to grow participating businesses and sector awareness.
- Telling the story of the sector
 - Relationship building efforts will need tools to help characterize the sector for decision-makers, while demonstrating the impact of KORE businesses. KORE already plans to create a sector profile that draws on survey data collected through this study. This profile could be accompanied by a policy brief or a series of stories that speak to the successes of KORE businesses, the value they bring to the Kootenay community, and the challenges that they are working hard to overcome. The profile and policy brief(s) should not attempt to use survey data to extrapolate conclusions about the size of the sector or its economic impact, as the small sample size would make such conclusions inaccurate.

CONCLUSION

Selkirk Innovates appreciates the opportunity to have worked with KORE to better understand the needs of the businesses it serves and those of the outdoor recreation technology sector more broadly. Results from the KORE Regional Roundtables and the Sectoral Survey demonstrate that, while KORE businesses are diverse, there are some common characteristics that define that majority of businesses, foremost among these being that businesses are small, yet interested in growth. There are also several opportunities for KORE support that would help businesses achieve their goals while also strengthening the sector and contributing to economic development. Collectively, the roundtables and survey provided ample opportunity for outdoor recreation technology and manufacturing businesses in the Kootenay region to participate in setting the strategic directions for KORE over the next three to five years.

APPENDIX A: SURVEY INSTRUMENT

Outdoor Manufacturing Sector Survey

Introduction

This study is being conducted by Selkirk Innovates in partnership with the Kootenay Outdoor Recreation Enterprise Initiative (KORE). The aim of the study is to understand the position, contributions, and support needs of the Kootenay-based outdoor manufacturing sector. This includes collecting the following types of information about participating businesses:

- company characteristics (location, length of time in business, etc.);
- workforce characteristics;
- revenue and sales information; and
- business support needs.

In order to provide this information, we would like you to complete a survey. If possible, we would like to collect your responses through a live interview either on the phone or through Zoom. This format will allow you to ask clarifying questions about the survey. In addition, it is our experience that we can gather higher-quality data through this format. However, if we are not able to schedule an interview with you, we will send you a link to complete the survey on your own.

The data collected will be used by KORE as they plan their strategic initiatives for the next 2-5 years. Results will help ensure KORE's programming and advocacy is valuable to the sector. The results will build on information gathered at a series of focus groups that KORE held around the region in June.

The survey should take about 30 minutes if you participate in a live interview, or 20 minutes if you do it on your own using the survey link. Your participation is voluntary and you may withdraw at any time. You may also skip a question if you do not wish to answer it.

There are no known risks if you decide to participate in this survey. Survey data will be kept confidential within the research team. KORE will only receive analyzed data that has been aggregated. We will aggregate data in a way that removes any information that could potentially identify you (e.g., data points with very low response numbers).

Survey Monkey is the online tool that will be used to collect survey responses. Data will be stored in Canada. The security and privacy policy for Survey Monkey can be found at: <https://www.surveymonkey.com/mp/legal/privacy/>. Your data will be downloaded and deleted from the Survey Monkey password protected account by November 30, 2023.

If you have any questions about this survey, please contact Lauren Rethoret at lrethoret@selkirk.ca.

The Selkirk College Research Ethics Board has approved this research study. If you have any ethical concerns, please contact reb@selkirk.ca.

* 1. Check yes to confirm that you understand the informed consent statement on this survey and agree to participate.

- Yes
- No

Outdoor Manufacturing Sector Survey

Part 1: Business Profile

2. Business Name

(Optional - please note this will only be used for tracking responses and will not be linked to your data in our report to KORE)

3. What are the first 3 digits of your business' postal code?

4. Which of the following types of activities best describe your business? (select all that apply)

- Gear manufacturing (hard goods)
- Gear manufacturing (soft goods)
- Food manufacturing
- Gear repair and servicing
- Product development/design
- Custom fabricating
- Outdoor recreation-related technology
- Other (please specify)

5. Which of the following outdoor recreation activities best aligns with your business? (select all that apply)

- Bicycling
- Fishing
- Motorized boating
- Non-motorized boating
- Climbing
- Hiking
- Tent camping
- RV/Trailer camping
- Hunting/shooting/trapping
- Motorcycling/ATVing
- Snowmobiling
- Skiing/snowboarding
- Outdoor lifestyle
- Other (please specify)

6. Is this a home-based business?

- Yes
- No

7. How long has your business operated?

- Less than 1 year
- 1 to 4 years
- 5 to 9 years
- 10 to 19 years
- More than 20 years

8. How many people does your business employ (including yourself)?

For sole proprietorships with no employees, this should be answered as "1" in either the full-time or part-time category. Please respond based on your maximum level of employment in the last year.

Full-time employees
(>35 hours/week)

Part-time employees
(<35 hours per week)

Casual employees (on
call)

Seasonal employees

Contractors in
employee-like
positions

9. Using Fiscal 2022 as a benchmark, what is the annual revenue of your business?

- Less than \$25,000
- \$25,000-\$50,000
- \$50,000-\$100,000
- \$100,000-\$250,000
- \$250,000-\$500,000
- \$500,000-\$1,000,000
- Over \$1,000,000

10. Please describe where the following business processes take place for your business (select all that apply):

	In house	Contracted (in region)	Contracted (in Canada)	Contracted (International)	Not applicable to my business
Product Design	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Please rank the following sales channels in terms of the relative volume of sales that each has contributed to your business over the past year:

Drag and drop to change the order of the choices. Choose N/A if an option does not apply to your business.

- | | | |
|----------------------|-----------------------|------------------------------|
| <input type="text"/> | Direct to consumer | <input type="checkbox"/> N/A |
| <input type="text"/> | Business to business | <input type="checkbox"/> N/A |
| <input type="text"/> | Retail | <input type="checkbox"/> N/A |
| <input type="text"/> | Online marketplace | <input type="checkbox"/> N/A |
| <input type="text"/> | Wholesale/distributor | <input type="checkbox"/> N/A |
| <input type="text"/> | Other | <input type="checkbox"/> N/A |

12. If your business uses another sales channel than those listed in the previous question, please specify the type of channel.

13. Approximately what percentage of your sales are made to the following geographical markets?

	0%	1% to 25%	26% to 50%	51% to 75%	76% to 100%
Kootenay Region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Elsewhere in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
United States	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Europe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other locations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14. Please select the most likely outlook for your business in the next 3 years (select one):

- Expand
 Continue to operate at a similar size
 Downsize
 Sell/transfer
 Merge with another company
 Close the business down
 Other (please specify)

15. Regardless of the most likely outlook for your business, how interested are you in growing the size of your business in the next 3 years? (select one)

- Very interested
- Somewhat interested
- Not interested

Outdoor Manufacturing Sector Survey

16. If you selected 'very interested' or 'somewhat interested' in the last question, what does growth look like for your business?

Outdoor Manufacturing Sector Survey

Part 2: KORE Strategic Directions

17. At a series of roundtable discussions held in the spring, KORE businesses and sector representatives suggested a number of activities for KORE to offer over the next 3-5 years. Under each of the categories below, please rate how helpful each suggested activity would be to your business.

Collaboration and Networking between KORE Businesses

(For more details on each activity, click the hyperlinked heading above)

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable
Asynchronous networking and peer learning space like an online forum or private Facebook group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direct facilitation of connections between businesses and support providers by KORE personnel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentoring program linking established and emerging businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In-person meetups in various communities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regular online meetups and learning sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>		

18. Please continue rating how helpful the following activities would be to your business.

Business Services

(For more details on each activity, click the hyperlinked heading above)

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable
Individualized marketing support and coaching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group marketing services that promote KORE businesses as a collective (e.g., collective brand, videos)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coaching for business activities other than marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discounted group insurance rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discounted group shipping rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared access to student employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Database of pre-vetted business service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

19. If you selected 'very helpful' or 'somewhat helpful' for 'Coaching for business activities other than marketing', what type of business coaching do you need?

20. Please continue rating how helpful the following activities would be to your business.

Sales and Distribution

(For more details on each activity, click the hyperlinked heading above)

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable
Online marketplace on KORE website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared demo days at relevant outdoor events or facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A Makers Market similar to what was held in Kimberley in 2022	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Representation of KORE businesses at industry trade shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shared displays at outdoor retailers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

21. Please continue rating how helpful the following activities would be to your business.

Promotion of the Outdoor Recreation Technology Sector

(For more details on each activity, click the hyperlinked heading above)

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable
A sector summit similar to what was held in Kimberley in 2022 and 2023	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Engagement of local and provincial government decision-makers to promote the impact and needs of the sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work with tourism representatives and recreational organizations to cross-promote products and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Work with educational institutions to ensure consideration of sector's workforce needs in training programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>		

22. What values do you think define KORE businesses? (check all that apply)

- Small businesses
- Focus on quality
- Unique, niche or special products
- Made in the Kootenays
- Designed in the Kootenays
- Reflective of the Kootenay recreation culture and environment
- Independently owned
- Adhering to higher standards of business conduct
- Other (please specify)

APPENDIX B: CLARIFYING DESCRIPTIONS INCLUDED WITH SURVEY

Terms

Question	Term	Description
4 – Type of business activities	Gear Manufacturing – Hard Goods	Hard goods are durable pieces of equipment (e.g., tents, skis)
4 – Type of business activities	Gear Manufacturing – Soft Goods	Soft goods include apparel and bedding
8 – Number of employees	Contractors in Employee-Like Positions	For example, someone you regularly hire for marketing or design services

Proposed Activities

Further explanation on potential future KORE activities is provided below. Please note that activity descriptions are preliminary and may change based on further exploration of activities identified as a priority by KORE businesses.

Collaboration and Networking between KORE Businesses	
Asynchronous networking and peer learning space like an online forum or private Facebook group	An online community where members can participate according to their own schedule. Could serve as a space to ask questions, share resources, etc.
Direct facilitation of connections between businesses and support providers by KORE personnel	An extension of work that has already been happening at KORE. Based on their knowledge of businesses' operations or needs, KORE staff or board members make connections to peers or support providers.
Mentoring program linking established and emerging businesses	Formalization of mentorship-oriented relationships currently being brokered by KORE. Would involve connecting businesses who have expressed a need for mentorship with those who have expressed an interest in providing it.
In-person meetups in various communities	Casual opportunities for KORE business representatives to meet others (or business support providers) in their area.
Regular online meetups and learning sessions	Periodic online meetings through a technology like Zoom. May be organized around different themes. Could include casual conversation as well as presentations on topics of interest to KORE businesses.
Business Services	

Individualized marketing support and coaching	Access to marketing support providers who work with each business to understand and respond to their individual needs.
Group marketing services that promote KORE businesses as a collective (e.g., collective brand, videos)	Promotion of KORE businesses under a common marketing campaign.
Coaching for business activities other than marketing	Facilitating group or individual access to business support providers for training on themes like business planning, growing sales, etc.
Discounted group insurance rates	Some KORE businesses shared that the cost of liability insurance is prohibitive. KORE could explore the possibility of accessing discounts based on a bulk insurance buy.
Discounted group shipping rates	Some KORE businesses shared that the cost of shipping is problematic in some communities. KORE could explore the possibility of accessing preferred shipping rates based on a shared account or group buy.
Shared access to student employees	Some umbrella organizations like KORE have hired a summer student who then provides multiple businesses with support for small projects under a common theme (e.g., marketing, advanced manufacturing)
Database of pre-vetted business service providers	Some KORE businesses expressed interest in a shared database of vendors (marketers, web designers, etc.) who have knowledge of the outdoor industry and/or successful experience working with other KORE businesses.
Sales and Distribution	
Online marketplace on KORE website	A sales channel directly on the KORE website.
Shared demo days at relevant outdoor events or facilities	For example, KORE ski manufacturers gathering to offer demos during an event at one of the region's ski hills.
A Makers Market similar to what was held in Kimberley in 2022	Similar to a farmer's market. Brings makers together to profile and sell their products to attendees.
Representation of KORE businesses at industry trade shows	Attendance by KORE personnel or board members at trade shows to collectively promote KORE businesses and the Kootenay outdoor recreation technology sector.
Shared displays at outdoor retailers	Engaging with outdoor retailers (either in-region or out-of-region) to create a display that profiles the products of multiple KORE businesses.
Promotion of the Outdoor Recreation Technology Sector	

A sector summit similar to what was held in Kimberley in 2022 and 2023	A conference that brings together manufacturers, product designers, economic development practitioners, investors, government representatives, etc. from across western North America.
Engagement of local and provincial government decision-makers to promote the impact and needs of the sector	Efforts to share the story and impact of the sector so that its needs are considered in policy-making. May include presentations, meetings, development of policy briefs, etc.
Work with tourism representatives and recreational organizations to cross-promote products and services	For example, a campaign that highlights the region's trails while also featuring locally-made hiking gear.
Work with educational institutions to ensure consideration of sector's workforce needs in training programs	Documenting and sharing the skills that KORE businesses need to fill in order to succeed.

APPENDIX C: DETAILED ROUNDTABLE CODING RESULTS

Code	Cranbrook	Fernie	Invermere	Nelson	Revelstoke	Trail	Total
How has KORE helped your business?	0	0	0	0	0	0	0
Accessing fresh perspectives	0	1	0	2	0	0	3
Awareness of opportunities	0	0	0	1	0	1	2
Being part of a community	0	0	1	3	1	1	6
Business to business relationships	0	0	1	0	0	1	2
Exposure to new markets, customers or audiences	0	0	1	1	0	5	7
Inspiration for what can be done here	0	1	1	4	0	1	7
Knowledge sharing, mentorship, and advice	0	4	2	9	1	8	24
Legitimacy for sector and businesses	0	1	0	5	0	0	6
More sales and contracts	0	0	2	7	0	0	9
Telling the story of the sector	0	0	1	0	1	1	3
How could KORE help your business?	0	0	0	0	0	0	0
Better website	0	1	1	0	2	0	4
Business to business connection	3	1	2	0	2	0	8
Engagement with government	0	0	1	2	0	0	3
Events including summit or makers market	5	0	5	11	12	4	37
Formalized networking and knowledge sharing	3	1	16	4	9	3	36
Funding and financing	0	4	3	5	4	4	20
Group buys	1	3	9	0	4	11	28
Insurance	0	0	0	0	0	3	3
Shipping	0	1	6	0	4	8	19
Help access qualified personnel	6	7	12	3	6	3	37
Resource or supplier directory	2	2	2	2	3	1	12
Student engagement	0	3	6	1	1	2	13
Solidify KORE Mandate and Model	11	4	13	8	2	1	39
Better define KORE brand and values	10	3	13	3	1	1	31
Market expansion	5	7	6	4	4	4	30
Beyond the Kootenays	2	1	1	4	2	3	13
Marketing and branding	3	3	3	2	1	21	33
Shared space	2	2	0	11	3	3	21

Telling the story of the sector	3	1	3	4	0	0	11
Training, coaching, and business skill development (other than marketing)	0	9	2	1	13	0	25
What does a strong sector look like?	0	0	0	0	0	0	0
Businesses supported to stay small	4	3	1	2	3	2	15
Capitalizing on place and maker knowledge	9	2	1	3	3	1	19
Flagship companies	1	2	0	2	0	0	5
Government awareness	1	0	1	0	0	0	2
Growth for those who want it	4	2	2	3	1	4	16
Inspiring others to enter sector	2	1	1	3	7	0	14
Investment	0	0	1	4	0	4	9
Relationships between businesses	1	5	4	2	1	5	18
Relationships with the broader rec ecosystem	4	2	6	0	4	3	19
Reshoring manufacturing	6	5	2	0	2	2	17
Resilience to challenges	0	0	3	0	0	0	3
Strong business teams and skills	0	0	0	1	0	1	2
Sufficient supportive infrastructure	2	5	1	0	1	0	9
Talent attraction and development	8	1	3	2	0	0	14
Visibility and legitimacy	0	1	1	4	0	0	6
Wider benefit to community	0	0	2	0	0	1	3
What is needed for a strong sector?	0	0	0	0	0	0	0
Fill gaps in business support and coaching	1	3	1	0	4	3	12
Attraction of new participants	0	0	0	0	3	0	3
Making connections and supporting partnerships	1	0	0	3	2	0	6
Sector promotion and representation	1	2	14	22	2	2	43
Demonstration of impact	1	2	2	11	2	1	19
Develop/join an industry association	0	0	0	5	0	0	5
To government	0	0	6	3	0	0	9
Support to reach consumers	1	0	1	4	2	1	9
Who should be involved?	12	14	4	12	5	0	47
Business support organizations	2	2	0	0	0	0	4
Colleges or academia	1	2	1	1	3	0	8
Consumers	1	0	0	2	0	0	3

Distributors	0	0	0	0	1	0	1
Economic development	0	2	1	2	1	0	6
Finance	1	1	0	1	0	0	3
Government	2	2	1	4	0	0	9
KORE	0	0	1	0	0	0	1
Other organizations along the supply chain	2	0	0	0	0	0	2
Trusts	0	0	0	2	0	0	2
Wider rec and environment sector	3	5	0	0	0	0	8

APPENDIX D: SURVEY DATA TABLES

3. Business Location (n=29)

Postal Code	#	%
V1L	13	45%
Other	6	21%
VOA	3	10%
VOE	3	10%
VOB	2	7%
VOG	2	7%

4. Business Activities (n=29)

Activity	#	%
Product development/design	23	79%
Gear manufacturing (hard goods)	15	52%
Outdoor recreation-related technology	12	41%
Gear repair and servicing	10	34%
Custom fabricating	10	34%
Gear manufacturing (soft goods)	9	31%
Other	2	7%

5. Related Outdoor Recreation Activities (n=29)

Activity	#	%
Outdoor lifestyle	15	52%
Bicycling	13	45%
Skiing/snowboarding	13	45%
Tent camping	8	28%
Non-motorized boating	6	21%
Hiking	6	21%
Fishing	5	17%
RV/Trailer camping	5	17%
Snowmobiling	5	17%
Other	5	17%
Motorcycling/ATVing	4	14%
Motorized boating	3	10%
Hunting/shooting/trapping	3	10%

6. Home-Based Business (n=29)

Home-based business?	#	%
Yes	17	59%
No	12	41%

7. Length of Time in Business (n=29)

Duration	#	%
Less than 1 year	5	17%
1 to 4 years	8	28%
5 to 9 years	9	31%
More than 10 years	7	24%

8. Number of Employees (n=29)

Range	Full-time		Part-time		Casual/On-Call		Seasonal		Contractors in Employee-Like Positions	
	#	%	#	%	#	%	#	%	#	%
0 employees	13	45	13	4	25	86	2	8	26	90
1 or 2 employees	11	38	13	45	4	14	0	0	2	7
3-9 employees	2	7	3	10	0	0	0	0	1	3
10+ employees	3	10	0	0	0	0	1	3	0	0

9. Annual Revenue (n=24)

Range	#	%
Less than \$50,000	11	46%
\$50,000 to \$250,000	3	13%
\$250,000-\$500,000	3	13%
\$500,000-\$1,000,000	3	13%
Over \$1,000,000	4	17%

10. Location of Business Processes (n=29)

	In house		Contracted (in region)		Contracted (in Canada)		Contracted (International)		Not applicable to my business	
	#	%	#	%	#	%	#	%	#	%
Product Design	23	79	6	21	3	10	1	3	2	7
Manufacturing	17	59	5	17	5	17	9	31	1	3
Marketing	24	83	4	14	1	3	1	3	2	7

Sales	24	83	3	10	3	10	4	14	0	0
Distribution	22	76	1	3	7	24	6	21	2	7

11. Sales Channels (n=26)

Answer Choices	1 (*6)	2 (*5)	3 (*4)	4 (*3)	5 (*2)	6 (*1)	N/A (*0)	Total Weight	Average Weight
Direct to consumer	14	5	2	0	0	0	4	117	4.5
Business to business	3	7	3	0	0	1	11	66	2.5
Retail	0	2	0	3	1	1	17	22	0.8
Online marketplace	4	5	4	0	2	0	9	69	2.7
Wholesale/distributor	5	1	4	3	1	0	11	62	2.4
Other	0	0	1	2	0	1	20	11	0.4

12. Location of Sales (n=25)

Range	Kootenay Region		Elsewhere in Canada		United States		Europe		Asia		Other locations	
	#	%	#	%	#	%	#	%	#	%	#	%
0%	0	0	2	8	9	36	17	68	18	72	19	76
1% to 25%	14	56	9	36	10	40	8	32	7	28	6	24
26% to 50%	4	16	5	20	4	16	0	0	0	0	0	0
51% to 75%	3	12	6	24	1	4	0	0	0	0	0	0
76% to 100%	4	16	3	12	1	4	0	0	0	0	0	0

13. Business Outlook (n=28)

Outlook	#	%
Expand	17	61%
Continue to operate at a similar size	5	18%
Sell/transfer	3	11%
Other	3	11%

14. Interest in Growing the Business (n=29)

Level of Interest	#	%
Very interested	21	72%
Somewhat interested	6	21%
Not interested	2	7%

15. What Growth Means to the Business (n=26)

Theme	#	%
Funding	1	4%
Expanding Networks	1	4%
More Employees	2	8%
Ability for Owners to Focus on Less Day to Day	2	8%
New Equipment or Proper Utilization	2	8%
Improved Marketing/Brand Awareness	3	12%
Beginning Production/Manufacturing	4	15%
Improving Profitability/Sustainability	6	23%
Larger Product/Service Line	7	27%
More Diverse Market	7	27%
More sales	12	46%

16. Priority Activities – Collaboration and Networking (n=28)

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable	Total Score	Average Score
Regular online meetups and learning sessions	7	16	5	30	1.1
Asynchronous networking and peer learning space like an online forum or private Facebook group	9	13	6	31	1.1
In-person meetups in various communities	8	15	5	31	1.1
Direct facilitation of connections between businesses and support providers by KORE personnel	10	15	3	35	1.3
Mentoring program linking established and emerging businesses	15	9	4	39	1.4

17. Priority Activities – Business Services

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable	Total Score	Average Score
Discounted group insurance rates	13	3	12	29	1.0
Coaching for business activities other than marketing	10	11	6	31	1.1
Discounted group shipping rates	14	6	8	34	1.2
Group marketing services that promote KORE businesses as a collective (e.g., collective brand, videos)	13	10	5	36	1.3

Shared access to student employees	13	11	4	37	1.3
Database of pre-vetted business service providers	13	11	3	37	1.3
Individualized marketing support and coaching	15	8	5	38	1.4

17a. Business Coaching Needs

Theme	Number of Responses
Anything delivered outside of work hours	1
Management	1
Grants	1
International markets	1
Quality control	1
Regulatory compliance	1
Technology	1
Sales/distribution	2
Human resources	2
Website	2
General business development and operation	2
Accounting/financial reporting	4

18. Priority Activities – Sales and Distribution

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable	Total Score	Average Score
A Makers Market similar to what was held in Kimberley in 2022	5	13	9	23	0.8
Shared demo days at relevant outdoor events or facilities	9	11	8	29	1.0
Online marketplace on KORE website	11	9	8	31	1.1
Shared displays at outdoor retailers	14	6	8	34	1.2
Representation of KORE businesses at industry trade shows	16	7	5	39	1.4

19. Priority Activities – Promotion of the Outdoor Recreation Technology Sector

	Very Helpful	Somewhat Helpful	Not Helpful or Not Applicable	Total Score	Average Score
A sector summit similar to what was held in Kimberley in 2022 and 2023	12	9	6	33	1.2

Work with educational institutions to ensure consideration of sector's workforce needs in training programs	11	12	5	34	1.2
Work with tourism representatives and recreational organizations to cross-promote products and services	16	9	3	41	1.5
Engagement of local and provincial government decision-makers to promote the impact and needs of the sector	17	8	3	42	1.5

20. Businesses Values

Value	#	%
Other	4	14%
Made in the Kootenays	19	68%
Independently owned	21	75%
Designed in the Kootenays	23	82%
Small businesses	24	86%
Adhering to higher standards of business conduct	24	86%
Focus on quality	25	89%
Unique, niche or special products	25	89%
Reflective of the Kootenay recreation culture and environment	26	93%

301 Frank Beinder Way,
Castlegar, BC V1N 4L3
phone **250.365.7292**
toll free **1.888.953.1133**
email **info@selkirk.ca**