

40 min to complete

# Enhancing Winter & Shoulder Season Tourism in Canada

Six-Module Learning Series

# Webinar

# Elevating Canadian Experiences: Agenda

03:40 to complete

## **Module One: Introduction to Elevating Canadian Experiences**

- a. The Goal of the Elevating Canadian Experiences Program
- b. Approach to Developing the Elevated Canadian Experiences Program
- c. Tourism During a Crisis

## Elevating Canadian Experiences: Agenda

07:45 to complete

### **Module Two: Seasonality in Tourism**

- a. Global Challenges
- b. Causes of Seasonality
- c. Four Factors Impacting Your Business

# 02

## Elevating Canadian Experiences: Agenda

05:15 to complete

### **Module Three: Canada's Challenges with Seasonality**

- a. Canada's Bell Curve
- b. Winter and Shoulder Season Factors
- c. A Peak Season Destination

# 03

## Elevating Canadian Experiences: Agenda

04:15 to complete

### **Module Four: Shoulder Season Tourism**

- a. Why Choose Canada?
- b. Canada's Barriers
- c. Popular Canadian Destinations & Activities

# 04

## Elevating Canadian Experiences: Agenda

10:00 to complete

### **Module Five: Strategic Planning**

- a. Seasonality Strategic Questions
- b. Six Ideas to Boost Seasonal Tourism
- c. Matching Consumer Needs



## Elevating Canadian Experiences: Agenda

06:45 to complete

### **Module Six: Case Studies & Key Takeaways**

- a. Lapland, Finland
- b. Iceland
- c. Key Takeaways



**Module One:**

# **Introduction to Elevating Canadian Experiences**



## Elevating Canadian Experiences: Goals

***The Elevating Canadian Experiences program is designed to enhance Winter & Shoulder Season Tourism in Canada.***

## **Elevating Canadian Experiences: Goals**



**Identify communities  
with high potential**



**Support businesses, DMOs  
and other various  
stakeholders**

# Elevating Canadian Experiences: Six-Step Approach



## Elevating Canadian Experiences: Tourism During A Crisis

### Key Considerations:

- Key partnerships
- Flexible offerings
- Innovative products, services and packages
- Long-term solutions



02

**Module Two:**  
**Seasonality in**  
**Tourism**

# Seasonality in Tourism: Global Challenges



## Financial:

- Reduced total revenue
- Limited access to capital
- Lower ROI



## Seasonality in Tourism: Global Challenges

### Operational:

- Labour attraction (high season)
- Unemployment (low season)
- Idle resources and facilities





## Visitors and Communities:

- Social carrying capacity
- Overcrowding in sensitive areas



# Seasonality in Tourism: Causes of Seasonality



Weather



Calendar effects  
and timing decisions

01



02



04



03



Awareness of destination,  
brand and availability  
of experiences



Interest by  
stakeholders

## **Weather**

***There's no such thing as  
bad weather, just bad gear.***



## **Calendar effects and timing decisions**

***Eventually, consumers will work, learn and travel all at the same time.***



## **Interest by stakeholders**

***Fatigue and depleted resources are barriers that cause seasonality in tourism.***



## Seasonality in Tourism: Causes of Seasonality

### **Awareness of destination, brand and availability of experiences**

***Traveller perception, right or wrong, has  
a major impact on seasonality in tourism.***



## Seasonality in Tourism: Four Factors Impacting Your Business

- Insecurity of decision making
- The McDonald's effect
- Bragging rights
- FOMO



003

**Module Three:**

**Canada's Challenges  
with Seasonality**



## Challenges with Seasonality: Canada's Challenges

- Toronto, Vancouver and Montreal are the most visited cities in Canada.
- Only 1% of visitor activities are winter-based.
- 85% of visitors travel to Ontario British Columbia and Quebec.
- Accommodation in major cities peaks during the summer.
- Geographic and seasonal concentration can have a negative impact on visitor experience.

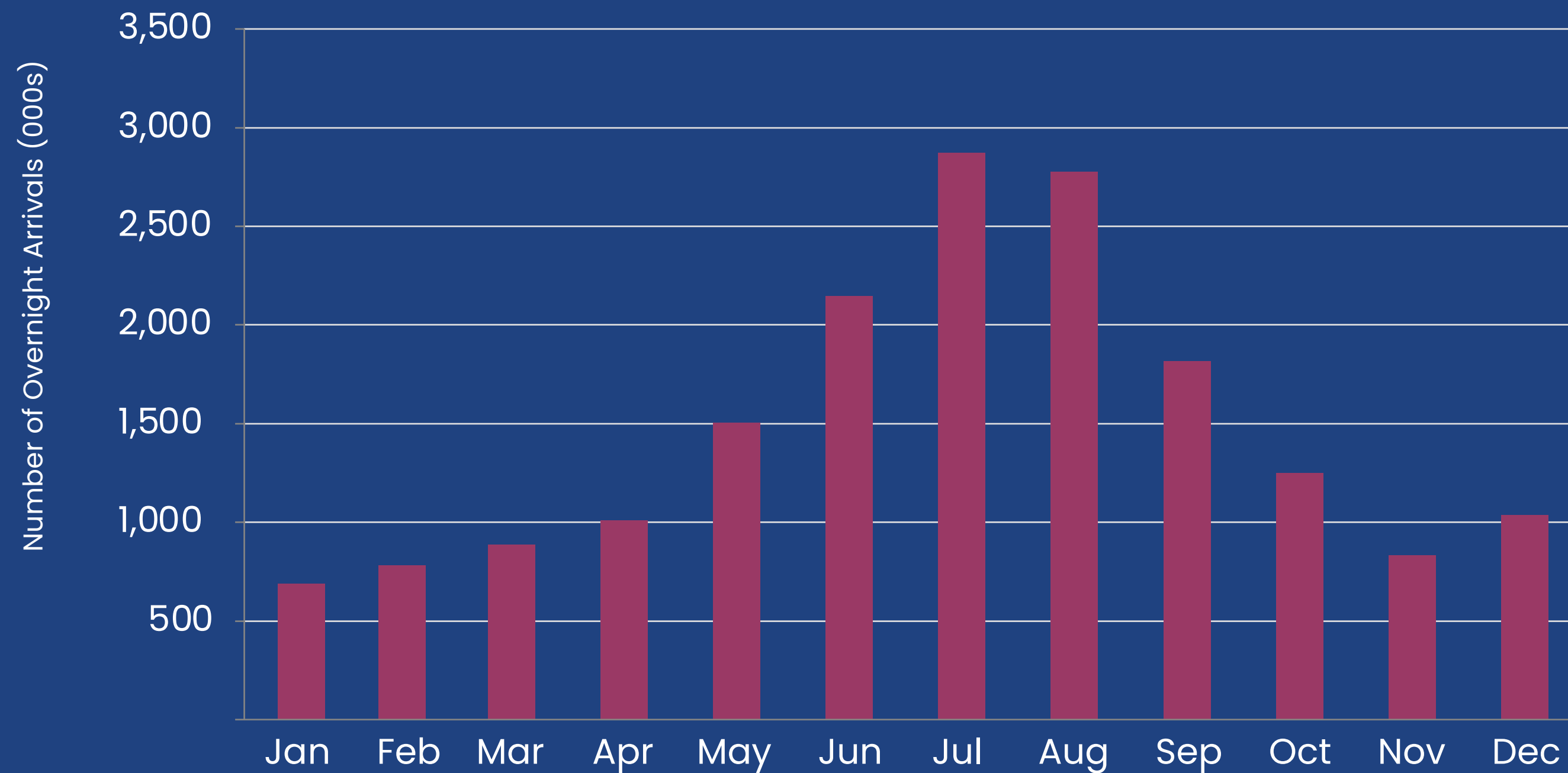


***There is pent-up demand for travel, but consumer behaviour has drastically changed.***

# Challenges with Seasonality: Canada's Bell Curve

## Seasonality In Canada

Monthly Average of Total International Arrivals to Canada (1990–2018)



***The perception is tourism in Canada begins the Victoria Day long weekend and ends on Labour Day.***

## Challenges with Seasonality: Shoulder Season Factors

### Motivators:

- Fewer crowds
- Perceived as less expensive
- Traveller profile is similar to peak season consumers

***The shoulder season is defined as March, April and May; as well as September and October.***

## Challenges with Seasonality: Shoulder Season Factors

### Barriers:

- Potential for poor weather
- Children are back to school
- Lack of products, services, attractions and operators

***There is opportunity to stimulate off-season travel by developing strategies around school holidays.***

## Challenges with Seasonality: Shoulder Season Factors

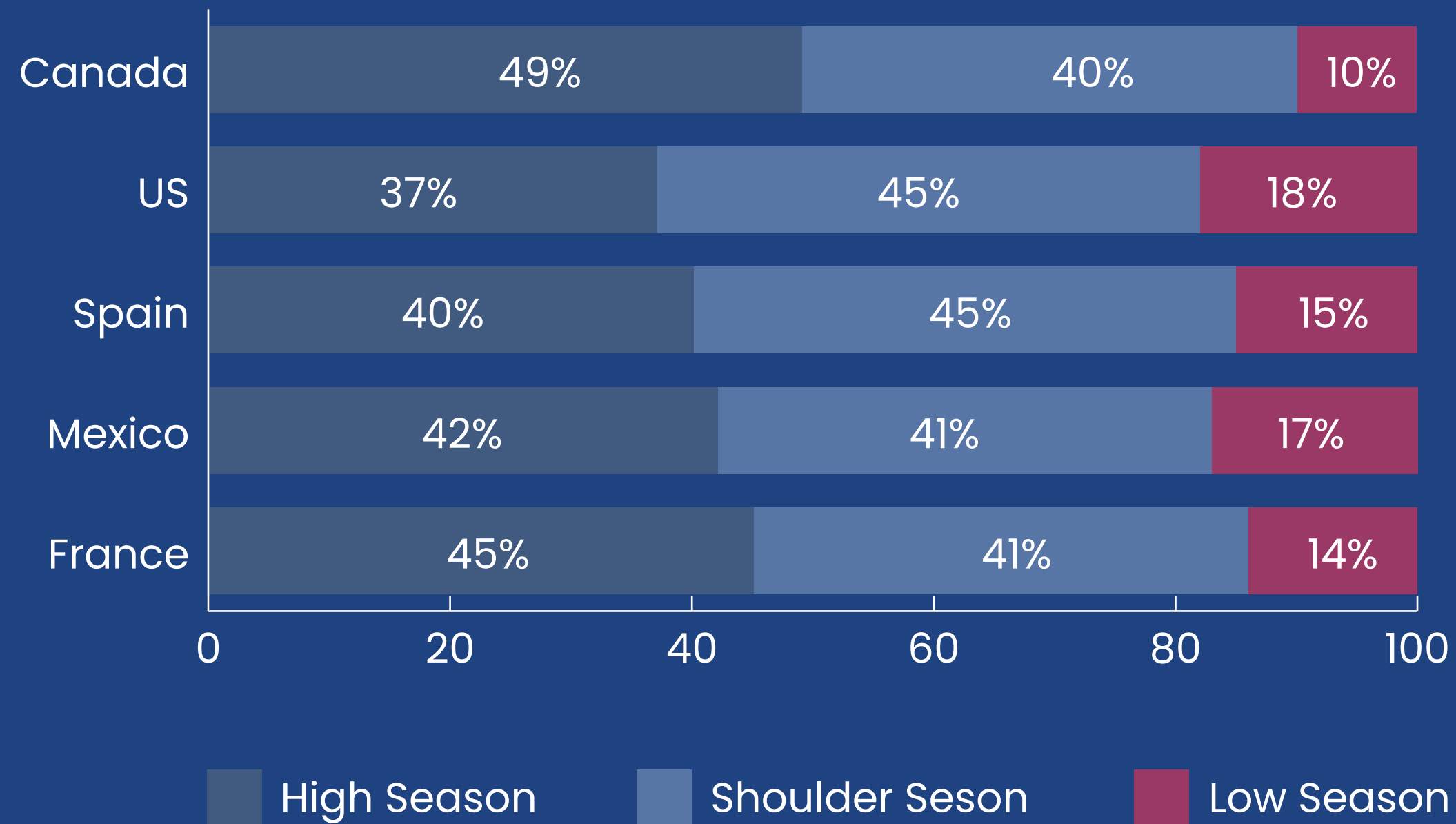
### Activities:

- Sightseeing
- Outdoor adventure
- Culinary experiences

***Consumers want a full itinerary-like experience combining everything they want to see, taste and do.***

## Challenges with Seasonality: A Peak Season Destination

### Canada: A High Season (Summer) Destination



***Canada is a seen as a high season destination by international and national consumers.***

004

**Module Four:**

**Winter and Shoulder  
Season Tourism**

## Winter and Shoulder Season Tourism: Why Choose Canada?



**Canadians**

**47%**

Motivated by cheaper accommodations



**Britons**

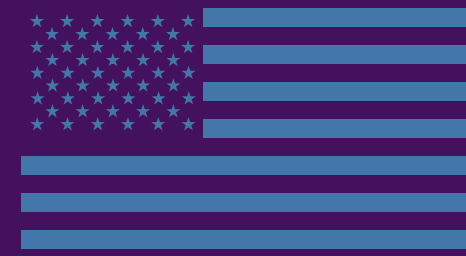
**53%**

Motivated by less expensive flights

***The lack of crowds is the most common driver for shoulder season travel to Canada.***



## Winter and Shoulder Season Tourism: Why Choose Canada?



**Americans**

**16%**

Motivated by  
friendlier people

***Americans have a wider range of reasons for travel to Canada during the shoulder season.***

## Winter and Shoulder Season Tourism: Canada's Barriers?

***Poor weather in the fall and spring is widely believed to be Canada's largest barrier to developing shoulder season tourism.***

***The possibility of attractions and trails being closed is the most common reservation consumers have about off-season travel.***

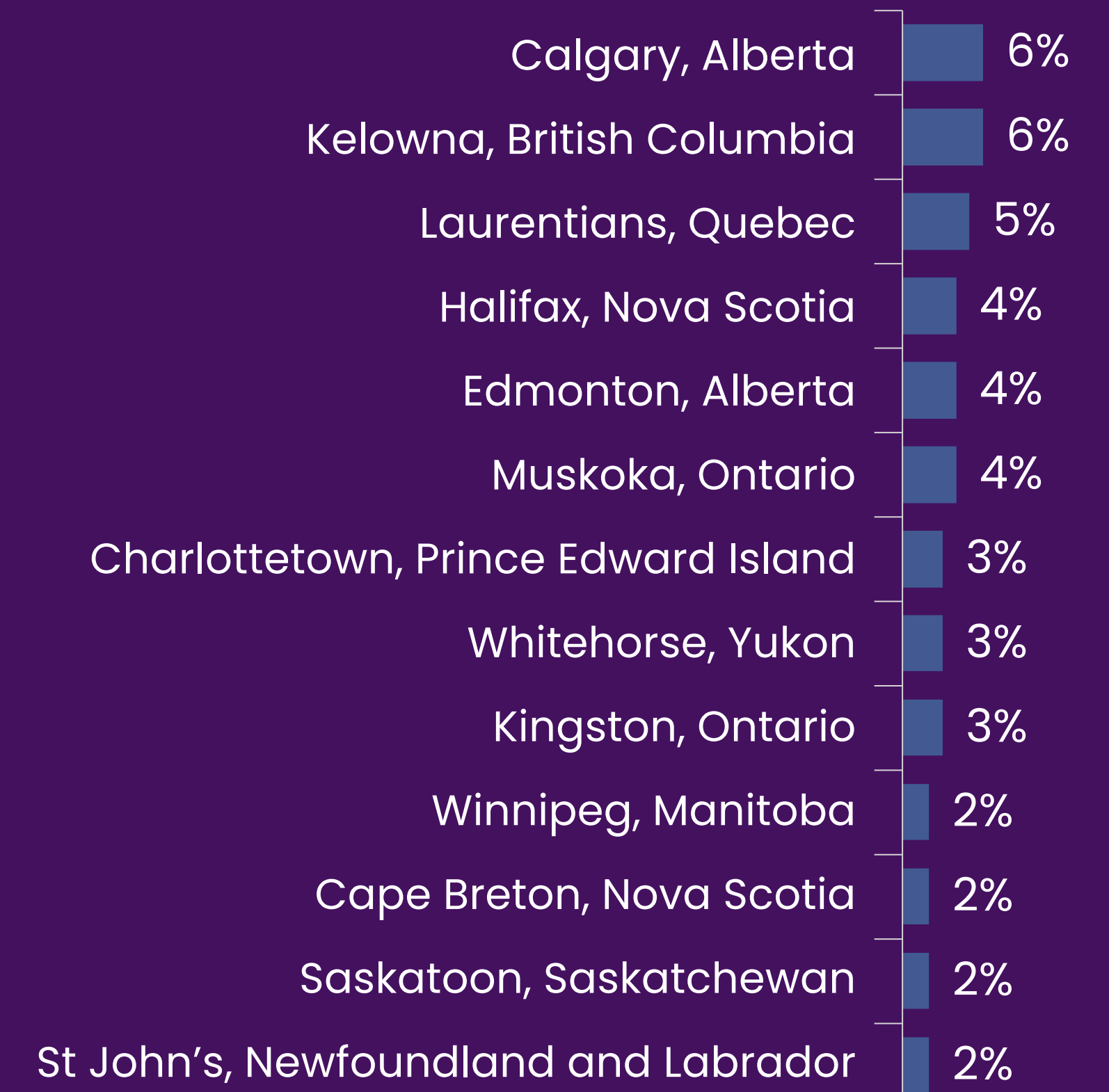
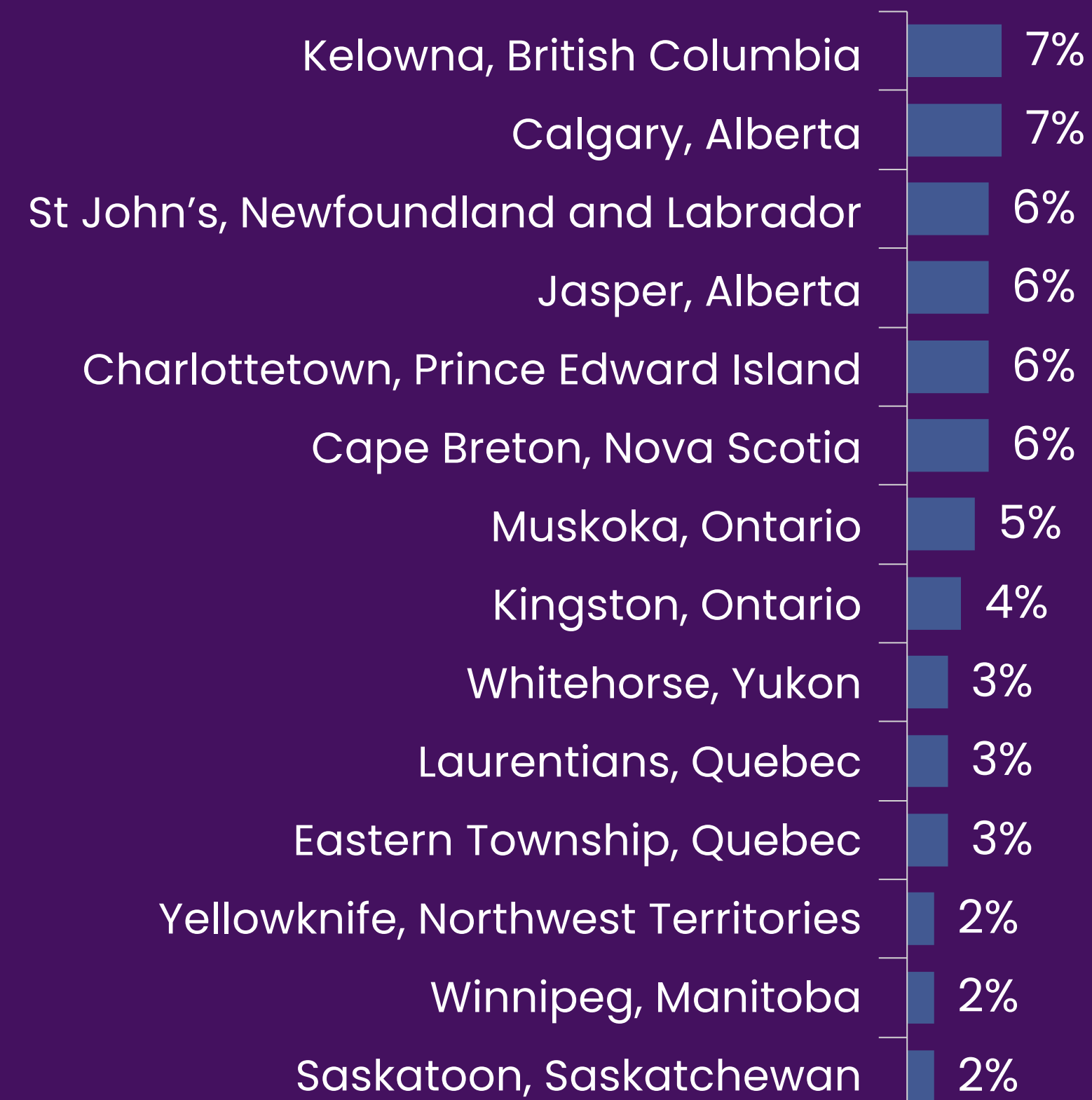
# Winter and Shoulder Season Tourism: Popular Canadian Destinations

## Additional Canadian Destinations – Most Likely to Visit in Shoulder/Winter Season

% interested to visit during...

Shoulder Season

Winter Season



## Winter and Shoulder Season Tourism: Popular Canadian Destinations

***Marquee destinations with the highest brand awareness in the peak season are also most likely to be visited during the winter and shoulder seasons.***

***Second tier destinations are still seen as an attractive alternative despite being less popular or lesser known amongst Canadian consumers.***

# Winter and Shoulder Season Tourism: Popular Canadian Activities

## Sightseeing

Most popular among  
Canadians, Americans  
and Britons.

## Culinary

Particularly popular  
with Canadians and  
Americans.

# Winter and Shoulder Season Tourism: Popular Canadian Activities

## National Parks

Popular among American and British consumers.

## Wildlife

Particularly popular among Britons during the shoulder season.



## Winter and Shoulder Season Tourism: Reflection Questions

01

***What is the top opportunity for winter and shoulder tourism in your region?***

- Food & drink
- Outdoor adventure
- Festivals & events
- Cultural experiences
- Something else

## Winter and Shoulder Season Tourism: Reflection Questions

02

***Who are the prime consumers for winter and shoulder tourism in your region?***

- Business travellers
- Couples
- Young families
- Small groups
- Sporting teams
- Another group / market



### 03

#### ***What are the top challenges for winter and shoulder tourism in your region?***

- ✓ Perceptions of weather
- ✓ Awareness of activities
- ✓ Access to labour
- ✓ Lack of operator training
- ✓ Quality services / authentic experiences

005

**Module Five:**

# **Strategic Planning**

# Strategic Planning: Seasonality Questions



## Strategic Planning: Seasonality Questions



***Alter resident perception about off-season tourism?***

***Limit overcrowded marquee destinations?***

***Develop new winter and shoulder season offers?***

***Year-round destination/add weeks or months to the season?***

## Strategic Planning: Seasonality Questions

***What are the specific causes of seasonality in your destination?***



Climate



Marketing



Perceptions



Availability

## **Strategic Planning: Seasonality Questions**

***Is there a consensus to invest time, effort and finances into developing winter and shoulder season tourism?***

***What solutions will positively impact tourism organizers and operators, accommodation providers and key stakeholder?***

## **Strategic Planning: Seasonality Questions**

***Is there space, capital and community resources available to support the development of winter and shoulder season tourism?***

***What are the key drivers of winter and shoulder season tourism in similar destinations with comparable offerings, and can you effectively replicate those experiences?***

## Strategic Planning: Seasonality Questions

***How will the development of winter and shoulder season tourism impact the current marketplace?***



Environmental



Communal



Financial



## Strategic Planning: Seasonality Questions

***Are there any long-term issues that will challenge the sustainability of winter and shoulder season tourism in your destination?***

# Strategic Planning: Six Ideas to Boost Seasonal Tourism

1

## **Extend the Season**

Reduce prices before and after the peak season.

2

## **Create New**

**Attractions & Events**  
Develop indoor events and non-weather-dependant festivals.

## Strategic Planning: Six Ideas to Boost Seasonal Tourism

3

### **Revamp Destination**

Attract new audiences  
by changing image  
and facilities.

4

### **Rebrand as Unique or Prestigious**

Position some experiences as  
being exclusive or rare.

## Strategic Planning: Six Ideas to Boost Seasonal Tourism

5

### **Develop a Second Peak Season**

Add a strong winter season to a high summer season.

6

### **Add Non-Conventional Tourist Attractions**

Develop unique experiences within your destinations.

## **Strategic Planning:** Matching Consumer Needs

### **Pricing & Packaging:**

- Discounted or packaged pricing during the off-season
- Special occasion packages for accommodations, restaurants and activities

### **Diversifying Destination & Product:**

- Diversify into niche products and events such as sports tournaments, meetings and conferences
- Develop or package products for communities of interest groups

## **Strategic Planning:** Matching Consumer Needs

### **Market Diversification:**

- Attract regional markets, special interest travellers and specialized consumer segments

### **Destination Facilitation:**

- Align marketing campaigns with destination branding and positioning

### **Structural & Environmental:**

- Develop programs and structures to facilitate off-season visitation

0065

**Module Six:**

**Case Studies &  
Key Takeaways**

**Case Studies:** Lapland, Finland

**Building a winter tourism experience in partnership with local communities and Indigenous groups.**

- Winter and related recreational activities the main driver for growth in tourism
- Christmas and winter season continues to draw the most visitors with December being the most popular month





## Case Studies: Lapland, Finland

### **Building a winter tourism experience in partnership with local communities and Indigenous groups.**

- In 2017, approximately 2.9 million tourists visited with 1.5 million foreign visitors (U.K. Russia, Germany and Japan)
- January–April is the 2nd peak season, while June–September forms a 3rd season



## Case Studies: Iceland

### Tackling high summer season by growing winter and shoulder season offerings.

- June–August was traditionally the high season, but recent growth has been in the winter season
- Long-term strategy to develop Iceland as a year-round destination
- Extending the shoulder season is the focus by tourism stakeholders and authorities



### Common challenges facing seasonal tourism:

- Weather, staff and labour
- Product and experience development
- Authentic marketing and brand awareness
- Transportation, access and infrastructure
- Partnerships and networking
- Support for entrepreneurs



## Key Takeaways: Opportunities & Actions

### Strategy:

- Define goals and priorities
- Identify unique advantages and establish collaborative partnerships
- Link destination to key demand generators



## **Product & Experience Development:**

- Assess current offerings
- Tailor winter and shoulder season experiences to different markets
- Create packaged itineraries to enhance the visitor experience



## **Customer Service:**

- Evaluate service standards
- Create a customer service strategy to address barriers and concerns
- Ensure quality meets expectations in person/online



## Key Takeaways: Opportunities & Actions

### Marketing:

- Offer seasonal pricing
- Generate buzz with seasonal content and a compelling, authentic message
- Tailor image to reflect true seasonal experiences



## Key Takeaways: Opportunities & Actions

### Leadership:

- Evaluate service standards
- Create a customer service strategy to address barriers and concerns
- Ensure quality meets expectations in person/online





# Thank you

