

Elevating Canadian Experiences:

Developing Winter and Shoulder Season Tourism



Elevating
Canadian
Experiences™

Twenty31 tourism defined.

Canada

toolkit

Introduction

In 2019, the Creating Middle Class Jobs: A Federal Tourism Growth Strategy was launched with the aim to empower communities across Canada to leverage the potential for tourism. As part of that strategy, the Government of Canada committed to stimulate and diversify Canada's tourism products and experiences to overcome one of five of Canada's perennial tourism challenges outlined in a report commissioned by Destination Canada called "Unlocking the Potential of Canada's Visitor Economy".

Among the concerns was the high concentration of tourism demand in certain regions of Canada, and during the summer period. With just over three out of four international visitors only travelling to Canada's largest provinces (Ontario, British Columbia and Quebec), and most to the largest cities of Toronto, Vancouver and Montreal, the report recommended tourism opportunities expand beyond these large regions and cities into disparate rural communities across Canada.

In recognition of these challenges and priorities, the Government of Canada announced the Canadian Experiences Fund (CEF) of \$58.5 million offering an

unprecedented opportunity for Canada to expand and grow its distinctive products and experiences in communities that fall outside the most commonly and frequently visited areas in order to attract visitors to discover the charms of lesser-known parts of Canada and have experiences in those communities year round.

The funds were delivered through Canada's regional development agencies (RDAs) with a focus on five supporting initiatives. The Tourism Industry Association of Canada led the development of winter and shoulder season tourism in remote and rural communities, and farm-to-table / culinary tourism in a program called "Elevating Canadian Experiences: Winter and Culinary National Program". This program was supported through partnerships with Canada's Provincial and Territorial Tourism Industry Associations (PTTIA).

The program began with the launch of a series of workshops across Canada to provide information on the program, the importance of building winter and shoulder season tourism and culinary capacity for tourism in Canada.

Why a Toolkit?

Now more than ever, operating in tourism isn't easy. This toolkit is designed to help Canadian tourism businesses and destinations take advantage of previously untapped opportunities by developing strategies and plans for winter and shoulder tourism.

It offers valuable insights, worksheets, tips, tools and strategies to help you turn ideas into action. Each section begins with learning objectives and ends with a checklist to summarize the content and highlight

any action items to help you stay on track. We encourage you to read through the whole toolkit, but you may choose to jump ahead to specific sections based on your organization type, interest and experience!

This information, combined with the support of your Destination Marketing Organization (DMO), PTTIA, Provincial and Territorial Tourism Marketing Organization (PTO) and community tourism operators, will help empower you to grow by increasing tourism activity year-round.

Acknowledgements

This toolkit's recommendations are informed by the vast tourism experience of Twenty31 Consulting Inc. (www.twenty31.org), in-depth research, and insights drawn from over forty workshops with tourism stakeholders across Canada. The development team included:

Project Director

Greg Klassen, Partner

Project Manager

Erica D'souza, Tourism Strategist

Project Strategist

Joe Naaman, Partner

Project Facilitator

Oliver Martin, Partner

Research Director

Sam Mountford, Director

Research Analyst

Robin Gilbert Jones, Tourism Strategist

Have questions/comments?

We'd love to hear from you. Please get in touch at www.Twenty31.org, sending any enquiries, suggestions or success stories.

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Module 01:

The Current Landscape: Adjusting to a New Reality

Key Takeaways

- COVID-19 has had a profound impact on the global economy.
- There has been significant disruption to the travel and tourism industry, and specifically to small and medium-sized enterprises, travel trade channels, and destinations.
- Recovery phases and market expectations are continuing to shift.

Featuring

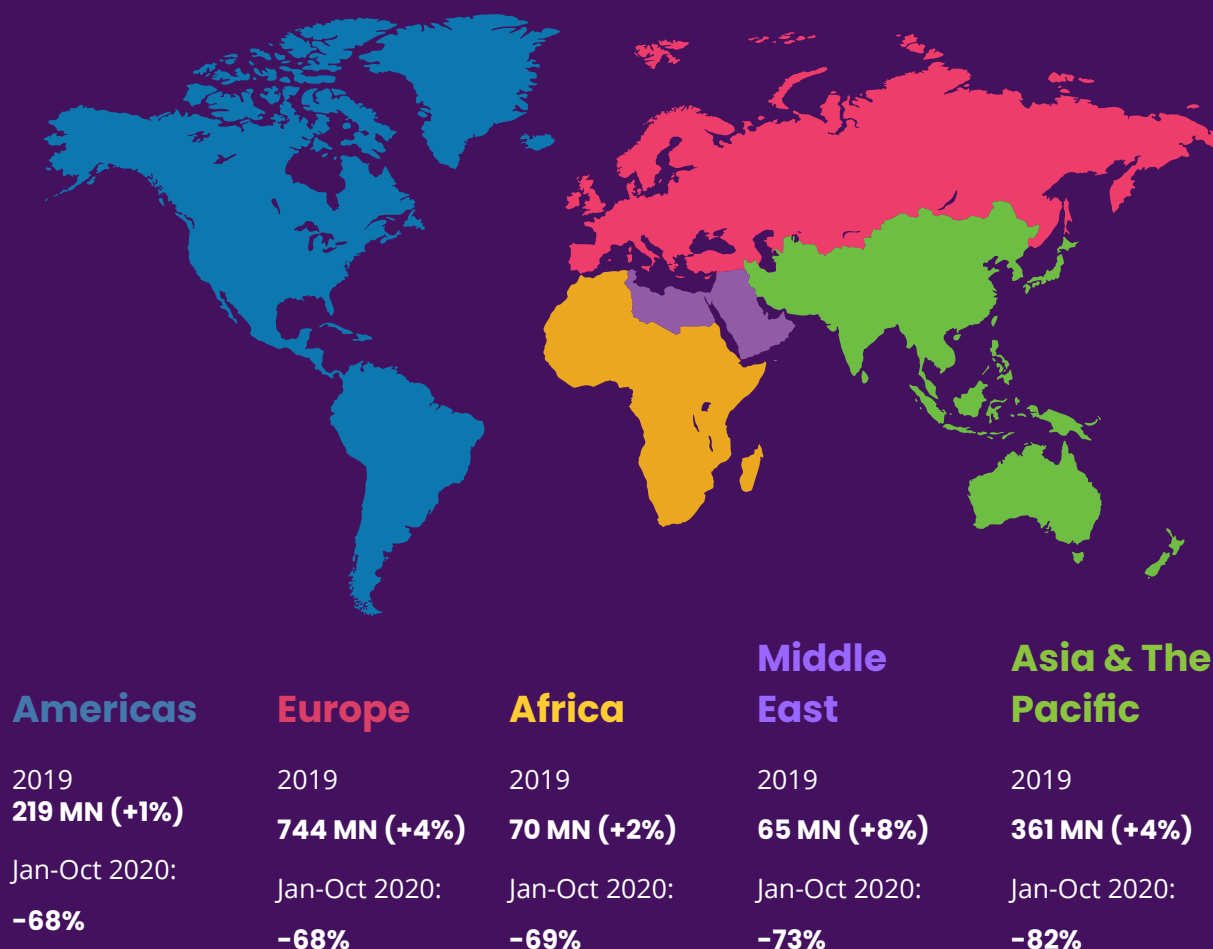
- The economic impacts of COVID-19
- Changes in travel and tourism
- Looking ahead to 2021 and beyond

This is a tremendously challenging time for everyone: as individuals, as business owners, as destination managers and as Canadians. While the world and businesses of all sizes across all industries have been affected, the travel industry faces challenges like no other. Airlines have been grounded, borders are closed, and leisure and business travel restricted. To say that this is uncharted territory, to which past global disruptions such as 9/11, the SARS outbreak and the 2009 financial crisis cannot compare, is an understatement.

What Are the Economic Impacts of COVID-19?

According to The World Tourism Organization (UNWTO), international tourism losses in 2020 were equivalent to about 1 billion arrivals and US\$ 1.1 trillion in international tourism receipts.¹ The estimated economic loss is expected to be US\$ 2 trillion in global GDP - more than 2% of the world's GDP in 2019.²

Figure 1: January – October 2020 International Tourist Arrivals



Source: UNWTO

What's Changed in Travel and Tourism?

Even with emerging glimmers of hope in the industry, it is likely that travel and tourism will be one of the last sectors to recover from the pandemic, with a likely time horizon of anything up to 24 months. Recovery, based on history, may be uneven and uncertain, and it will likely vary significantly by destination and region.

Until vaccines or treatments for COVID-19 become widely available, social distancing rules and group gathering restrictions will deter a full return to normal travel patterns. Nevertheless, as the economy recovers, rural destinations may benefit from travellers looking for less crowded destinations outside major urban areas that are also within easy reach of major markets. But this will require a comprehensive approach to safety that encompasses all stakeholders and is effectively communicated through DMOs to potential travellers.



What to Expect in 2021 and Beyond?

In late 2020 and early 2021, major travel and tourism and other sector sources published and circulated numerous “trends” or “predictions” reports for 2021 and a post-COVID-19 world. Below is a list that summarizes the most common top 12 “trends” from the myriad of reports reviewed that will likely impact destination winter and shoulder or “low-season” tourism development and growth in 2021, along with some insights on the potential impact they have on destinations as well as on operators.



01

Embracing Work from Anywhere

With a wholesale shift to remote working and keeping in touch with the office via digital technologies, the world is now everyone's office; 2021 will see an entirely new movement of "untethered" professionals – free from the constraints of offices, commutes and homes in the city, with more opportunities to temporarily relocate to places more beautiful and inspiring, and for longer periods of time.

Key Takeaways for Destinations:

Is it tourism or is it resident attraction? Lines will be further blurred between DMOs and economic development organizations in attracting the temporary visitor beyond the usual two-day to two-week vacationers. Loyalty programs and incentives will be required to attract the booming and competitive "workation" or "digital nomad" market.

Key Takeaways for Operators:

The development and marketing of travel office packages that meet the needs of digital nomads represent a tremendous opportunity for new business. These include long stay packages; hotel lobbies as shared workspaces and hotel and experience packages with shared workspace providers.



02

Travel With Intention and Impact

Sustainability will be more than a buzzword as people across the globe consider how to travel with a holistically green conscience; 'Regenerative Travel' continues to gain momentum with both companies and travellers seeking to minimize the negative effects of tourism on the planet while simultaneously making positive impact on their host destinations.

Key Takeaways for Destinations:

Clear sustainability goals, strategies and actions will be a required component of every destination marketing plan.

Key Takeaways for Operators:

The ability to demonstrate alignment and contribution towards the destination's sustainability initiatives will significantly impact business success.



03

Hygiene Over Fees

Travel decisions will be dramatically influenced by cleanliness standards; with increased scrutiny of hygiene due to COVID-19, search data finds that 45% of travellers included enhanced cleaning within their top three decision-making factors.

Key Takeaways for Destinations:

Perceptions of cleanliness, health and safety will rank higher than any other value proposition. “Tourism health and safety certified” from sources like EarthCheck and others providing health and safety assurances for destinations may be a key destination differentiator and driver of destination choice, and attract safety-conscious travellers.

Key Takeaways for Operators:

Protocols and procedures will continue to evolve based on the recommendations of health authorities – expect more costs. Health and safety from “tourism certified” sources may be a key differentiator for an operator and a driver of differentiation and choice.



04

The Rise of Rural

Search data is already showing that nearly 90% of overall searches are for trips to rural areas; cabin rentals are expected to be especially popular, accounting for 33% of total accommodation searches in 2020, a drastic 143% increase from 2019.

Key Takeaways for Destinations:

There will be significant opportunities to re-develop the tourism industry in ways that can address historical challenges related to over-tourism, environmental damage and unequal distribution of wealth.

Key Takeaways for Operators:

Entrepreneurial spirit, year-round offerings and new community partnerships will be key for business success.



05

The Slow Travel Movement

After a year of international lockdown, travel agents predict that, overall, travellers have acquired a taste for a slower pace; slow travel aims to give travellers a rich understanding of life in their destination through interactions with local people and opportunities to experience a community on a deeper level. This is especially important if the hassle of multiple COVID-19 negative tests is required, and long quarantine periods mean the quick trip is far less likely.

Key Takeaways for Destinations:

Expect tourists to stay for longer, spend more and even become more integrated into the local community.

Key Takeaways for Operators:

Integrative, local and authentic experiences that reflect this new aspiration can be marketed at a premium.



06

Wellness Tourism

It's time to embrace the future of wellness travel; the habits of travellers have changed, and more people are favouring a wellness staycation with demands for immunity-boosting retreats, socially distanced trips, private jet journeys and personal health and fitness holidays.

Key Takeaways for Destinations:

Bringing existing wellness tourism infrastructure to the forefront of destination marketing strategy will be a key competitive advantage.

Key Takeaways for Operators:

As wellness tourism has traditionally been positioned as a luxury experience, this new category of business could represent opportunities to build new, lucrative revenue streams.



07

Last Minute Bookings

When it comes to flexibility, more travellers are booking spontaneous last-minute trips; the average number of days between booking to check-in is now 50 days, down 37.5% from the average pre-pandemic lead time.

Key Takeaways for Destinations:

The ability to predict and plan for high and low volumes of travellers will become increasingly complex; investments in new methodologies for data tracking will pay dividends in the years to come.

Key Takeaways for Operators:

Business models will need to be adapted to absorb high degrees of uncertainty and surge capacity.



08

Younger Travellers

On the heels of a pandemic that poses the greatest threat to seniors and baby boomers, the average age of travellers has dropped precipitously across all categories; as the age and generational demographics of travellers shift to Gen X, it's likely that other consumer travel trends, such as the experiences on offer, popular destinations, preferred accommodations and amenities, will follow suit.

Key Takeaways for Destinations:

Understanding the values of the younger demographic, and being able to effectively communicate with them, will be paramount.

Key Takeaways for Operators:

Piloting new offers to meet the needs of Gen X in 2021 will form the basis of successful business in the years to come.



09

Supporting Local

With many borders still closed, and the potential of provincial quarantines looming, domestic locations in national parks, winter ski and beach towns will gain even more traction as preferred tourist choices; the focus on domestic tourism will continue to signal a massive departure from international and regular seasonal travel over the year to come.

Key Takeaways for Destinations:

Investing heavily in domestic tourism strategies will pay dividends in the longer term.

Key Takeaways for Operators:

Developing partnerships that reflect “loving what’s local” is a key step towards rebuilding economic stability.



10

Values-Driven Brand Authenticity

The intensity of the pandemic and the whole of 2020 has shed more light on the global issues faced by the collective; as we move into 2021, consumers will re-examine their values and seek the “new luxury” –brands with a conscience. The travel industry is no exception.

Key Takeaways for Destinations:

Now, more than ever, destinations will need to articulate their unique value propositions within the context of the new paradigm of health, safety, responsibility and equity, and how these values align with those of their prospective visitors.

Key Takeaways for Operators:

Like destinations, operators will need to define and demonstrate their values in authentic ways with a focus on proving “consciousness” through positive impact.



11

“Vaxications”

Pent-up demand for travel, the promise of vaccines for the general public by summer, and border/quarantine restrictions potentially being lifted by internationally coordinated digital health passports, will result in a rush of vaccine-enabled vacations.

Key Takeaways for Destinations:

Destinations capable of accepting travellers visiting for the purpose of receiving the vaccine should prepare special packages to maximize spending during the trip (even if they may be required to remain in quarantine). Additionally, destinations should consider coordination and standardization of certifications. We have already seen examples of limited supplies of vaccines being taken by visitors creating further animosity among residents for whom those vaccines were intended. In Florida they have stopped providing vaccines to visitors and the Yukon recently reported a case of a vaccine tourist getting the vaccine ahead of some residents. Proceed carefully with this trend.

Key Takeaways for Operators:

Operators should work closely with their destination leaders to identify potential opportunities to cater to this new travel segment.



12

Travel Testing, Proof of Vaccinations and Quarantines?

Many countries around the world will require proof of a negative corona virus test for all arriving international travellers; and may impose additional tests upon arrival or a few days later. Airports and hotels will add testing facilities, and airlines will enhance mobile apps with health features to prove negative tests. Testing may continue in spite of proof of vaccinations. And also, in spite of proof of vaccinations and multiple negative tests, destinations may still require quarantine periods of up to 14 days.

Key Takeaways for Destinations:

Harmonized testing protocols will need to be established and communicated, mirroring the international coordination of vaccine certification. This will take time to coordinate.

Key Takeaways for Operators:

Deep collaboration with government, health authorities and industry partners will be required to achieve alignment and consistency around health certification requirements.



The Current Landscape

Learning Checklist

- ☐ Understand the impacts of COVID-19 on the global economy.
- ☐ Recognize the ways the travel and tourism industry has been impacted and future opportunities.
- ☐ Stay up to date on the state of recovery and shifting market expectations.

¹UNWTO. "Impact assessment of the COVID-19 outbreak on international tourism"

²UNWTO. "Impact assessment of the COVID-19 outbreak on international tourism"

Other Resources:

CNN. "When will international travel return? Here's what we know right now"

Euronews. "What will travel look like in a post-Covid world?"

Forbes. "The Essential Travel Forecast Report 2021 (Part 4)"

Forbes. "Six Major 2021 Travel Trends Show Transforming Effects Of Covid-19"

Globe Trender. "Future Of Luxury Travel Forecast' Reveals 25 Trends For the New Decade"

Luxury Travel Advisor. "Tourism Australia Predicts Top Global Travel Trends for 2021"

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Phocus Wire. "Travel trends 2021 year of changes"

Seeker. "The Top Travel Trends and Destinations for 2021"

Skyscanner. "2021 Travel Trends and Traveller Mindset"

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WeForum. "Expert views: What the next normal looks like"

Amadeus. "6 trends for 2021: Travel's comeback story"

Big 7 Travel. "7 Top Tourism & Travel Trends for 2021"

The Economic Times. "Private drives, wellness retreat & other emerging tourism trends for 2021"

Hote News Now. "Travelers Expected to Make 'last-minute' Trips in 2021 "

Skift Research. "Defining the New Era of Wellness Tourism: Trends and Best Practices for Stakeholders"

CNN. "The travel trends to know in 2021"

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Entrepreneur. "Here are the top travel trends for 2021, according to Airbnb"

Euronews. "Here's what experts are forecasting for the travel industry in 2021"

Intrepid Travel. "How to go in 2021"

New York Times. "Testing Requirement Is the Latest Curveball for the Travel Industry"

Tourism Review. "Travel in 2021 – Youth Is Planning, Older People Are Cautious "

Travel Daily News. "The biggest wellness travel trends for 2021"

Travel Market Report. "8 Travel Trends for 2021, According to MMGY Global"

Travel Pulse. "Top Trends in Wellness Travel for 2021"

Veranda. "Here's What the Future of Travel Looks Like in 2021, According to Industry Experts"

Module 02:

Seasonality: Problem or Opportunity?

Key Takeaways

- Destinations can have their own unique high season, low season and shoulder season.
- Internal and external factors like weather, activity patterns, stakeholder interest and awareness can cause seasonality.
- A mindset shift will be key to driving forward new ideas and strategies to transform tourism in Canada.

Featuring

- Winter and shoulder season definitions
- The effects of seasonality on you & your community
- How to boost tourism year-round

What is known at this time is that tourism in Canada will not return to 2019 levels quickly (e.g. Tourism Economics, PATA and UNWTO all forecast a return to 2019 levels in a best-case scenario by 2024), and while it will recover, it will be in an altered form with a heavy reliance on domestic and regional visitors. This section covers the basics of seasonality and offers ideas and strategies that can transform our thinking around the tourism industry and visitor experience in Canada.

Why Tourism Matters

Before the emergence of COVID-19, the industry expanded at a rate higher than the global economy for almost a decade. The reasons for its growth have included a rising middle-class, low unemployment, advancing technology and increased access and connectivity. In 2019, a staggering 330 million jobs were supported by the travel and tourism industry globally.¹

Within Canada, tourism plays a critical role in entrepreneurial development and job creation. In fact, tourism generates 1 in 10 jobs in Canada and supports employment in every community across the country.²



What is Seasonality in Tourism?

The UNWTO defines seasonality as:³

A temporal imbalance in the phenomenon of tourism, which may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment, and admissions to attractions.



Although seasonality is sometimes viewed as a problem, it can empower destinations to break away from dated products and experiences and stereotypes. For instance, a summer beach hotspot may change its image to appeal to culinary enthusiasts and a ski destination may add a summer live music season to re-engage the same audience or a completely different one.

Benefits of winter and shoulder season tourism:

In recent years, winter and shoulder season tourism has attracted more investment thanks to its many economic benefits:

1. More reliable jobs;
2. Year-round revenue;
3. Ability to spread high concentrations of tourists around destinations;
4. Distribution of economic benefits from urban to rural areas; and,
5. Market diversification.

For destinations to address sustainability there has to be a focus on spreading visitation more evenly throughout the year. Within Canada, winter and shoulder season can help to improve tourism competitiveness and create the necessary demand to extend Canada's tourism season.



What Defines the Winter and Shoulder Season?

The summer season is traditionally the most popular time to visit and travel around Canada. Still, as travellers look for more authentic and unique experiences, real connection and interaction with locals and higher quality services and amenities, the winter and shoulder seasons are becoming coveted travel periods in their own right.

Establishing a clear description of each tourism season is a vital first step in understanding how destination features and challenges can be transformed into benefits for travellers. Each destination may have its own unique high season, low season and shoulder season which can last anywhere from a few weeks to a few months.



High Season

Depending on location, high season can occur during winter or summer. The months of June to August are considered the traditional high season in the Northern Hemisphere.

Low Season

The low season is dominant from November to March in the Northern Hemisphere. It peaks in January and begins to transition to shoulder season in April and May.

Shoulder Season

Shoulder season is used to describe the period between high season and low season. In Canada, there are generally two shoulder seasons: the main shoulder season, which falls between September and November and the second shoulder season, typically in April and May.

Winter Season

The winter season is the coldest time of the year, between autumn and spring. In the Northern Hemisphere, it is typically from December to March. In the Southern Hemisphere, it's the opposite.

Winter tourism can be defined either in terms of the actual season or the types of products and services associated with it.

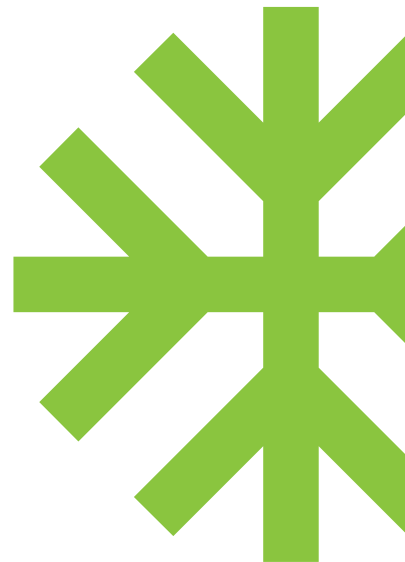


Figure 2: Global Examples of Shoulder Season Tourism⁴

Month	Example
January	In North Africa the Christmas peak crowds have passed and the weather warms.
March	In Brazil, Hawaii, and India the shoulder season emerges between local holidays.
April	In Western Europe the crowds thin and prices drop with still cool weather and chances of rain.
May	After the Cherry Blossom festivals end, Japan sees steep price reductions in Tokyo and Kyoto.
June	In Baja, Mexico prices lower and temperatures are mild between the Spring Break rush and the summer heat.
July	Despite hurricane areas, Puerto Rico, Dominican Republic, Jamaica, Turks and Caicos, and the Bahamas in the Caribbean will offer virtually empty beaches.
September	In South Africa it's early spring, animals are easier to spot as many trees do not have their seasonal leaves yet.
October	In the Mediterranean (Portugal, Spain, Rome, Naples), it is still easy to find warm temperatures.
November	Many destinations such as the Caribbean, South Pacific, Thailand, Cambodia, Vietnam, Bali, Singapore, Malaysia are bracing for the December rush.
December	In Costa Rica, the rainy season is ending but the majority of tourists have not arrived yet.

Source: Great Escape Publishing

Examples of Winter Season Tourism



Outdoor Adventure

- Skiing
- Ice-skating
- Snowboarding
- Walks and hiking
- Wildlife viewing



Arts and Culture

- Christmas villages
- Arts festivals
- Light festivals



Wellness

- Spas
- Hot springs



Indoor Sports

- Curling
- Sporting events



How to Identify Your Destination's Seasonality

Seasonality has distinct characteristics that are relatively easy to spot. Take a moment to look at your revenue or your destination's hotel occupancy rates. Do you see the changes by month and season? Is there a visible high, low and shoulder season?



Shoulder season

High season

Low season

The defining characteristics of seasonality include:⁵

- **Consistency:** It happens roughly at the same time each year and is predictable and reliable.
- **Commonality:** It affects other economic sectors and companies – from agriculture to accounting.
- **Cause:** It is affected by internal and external factors specific to the destination.

Why Does Seasonality Exist?

The causes of seasonality include natural factors, which are reflected through the conventional seasons (spring, summer, winter and autumn), as well as activity patterns and behavioural influences such as the reasons why people say they won't travel or choose not to travel at certain times of year.

The causes of seasonality include:



Weather

Temperature, hours of sunshine, rainfall, access, perceptions about weather and its unpredictability



Calendar

Christmas, Easter, Ramadan, Solstices, long weekends, other religious holidays



Timing

School vacations, industry vacations, agriculture or harvesting seasons, licensing requirements



Interest

Desire to expand seasons by tourism stakeholders



Awareness

Extent that travellers are aware of, and consider a destination for a visit



Service Levels

Extent that travellers believe businesses and attractions are open (actual or perceived), and that business owners believe there is demand beyond the high season



Entrepreneur Lifestyle

The decision business owners make to close for lifestyle reasons, especially if their business is a second income source

4 Factors Impacting Your Business Right Now

There are many factors that make the decision to travel in the winter and shoulder season tourism a particularly complicated one for consumers. Unfortunately, they all work together in some way to compound the issue for travellers.

01 Insecurity of Decision-Making

Travel spending is one of the most insecure decisions a consumer makes because there is little guarantee of a positive experience. You can only confirm if your purchase was worthwhile after a trip is complete.

02 The McDonald's Effect

To mitigate insecurity, consumers tend to go to places where they know what they're going to get. Tourism in the summer is known and familiar even if it's not the greatest, whereas the shoulder season can be less predictable.

03 Bragging Rights

Adding to this is the fact that travellers want to show off all of the places they've been and their experiences on social media. To get gorgeous photos they look for destinations with the most stunning scenery, trendiest food and the most beautiful things. During the shoulder season or winter it may be considered dark and dreary which is not nearly as appealing.

04 Fear Of Missing Out (FOMO)

When considering travel, consumers often worry that some products and experiences are unique to the summer months. As such, FOMO drives travellers to focus on the peak season when choosing a destination, and not the winter and shoulder seasons.

How Seasonality Affects You & Your Community

Seasonality affects tourism destinations and businesses in a number of ways. The most obvious fall within three categories: financial, operational and visitors and communities.

Financial



- Reduced 'total revenue' for a destination
- Access to capital due to short tourism season
- Lower return on capital investment

The most obvious effect of seasonality is the fact that we're leaving money on the table relative to the investments made. Investors look for places where they believe they are going to get the greatest return, and destinations that have longer seasons can demonstrate that they are working hard throughout the year to provide better and more predictable returns for investors.

Operational



- Labour attraction in high season and unemployment in low season
- Underutilization of resources and facilities

It's challenging to secure labour for short periods of time. Most people looking to build a career in tourism would prefer to work in a role with job security. While there are short-term labour pools (such as students) that are interested in working a few months at a time, being caught in a short-term hiring cycle is exhausting for everyone involved.

In addition, seasonality leads to the underutilization of resources, such as arenas, hotels, and museums. Unfortunately, some of these assets go virtually unused for large portions of the year.

Visitors and Communities



- Social carrying capacity
- Overcrowding at ecologically sensitive areas

Canadian destinations work because we have a social contract with residents, local government, tourism businesses, and consumers. If we only get tourists during the summer high season, we are putting enormous sustainability challenges on communities. Overcrowding at restaurants, museums, hiking trails, and boat lines can lower the quality of experiences and damage brand perceptions.

Lessons from Real Life: Different Views

When a destination has fewer tourism products and experiences available, the effects of seasonality really stand out. This can work for or against a destination, depending on the offering and the time span involved. For example, crowds would be sure to disappoint in a provincial park offering fall wildlife viewing. On the other hand, crowds would create a lively atmosphere—and be much more manageable—in a rural destination hosting a three-day Christmas artisan fair.



Making Seasonality Work for You

Although the negative side of seasonality often makes headlines, there are some positive elements as well.

Seasonality offers the potential to:

- Create experiences based on distinct seasons.
- Engage different types of travellers and audiences.
- Give communities a break from tourism.
- Create flexible employment (e.g., mobile youth, seniors).
- Build on rhythms of places and communities.
- Give operators time for planning, restoration and maintenance

Considering these unique elements, and others, when developing strategies can help unite stakeholders and get people invested and committed ([See Winter and Shoulder Season Strategy: A 3-Phase Process](#)).



How to Boost Tourism Year-round

A handful of actions have been tried and tested to reduce the impacts of seasonality and boost tourism year-round. Understanding local challenges, characteristics and collaboration within the industry and key decision-makers is a necessity.

01

Extending the Season

Reduce prices in months before and after peak season (i.e., spring deals in ski destinations)

02

Offering Different Attractions and Events

Develop events such as festivals, tournaments and competitions (i.e., sports tourism, chess)

03

Revamping the Destination

Changes to image, facilities and markets to attract new audiences and target market segments (e.g., millennial weekend getaways, senior small groups)

04

Rebranding the Destination as Unique/Prestigious

Positioning an opportunity to see something that may disappear or change (e.g., Polar Bear tourism in Churchill, Manitoba)

05

Adding a Second Main Season

Adding a winter sports season to a summer destination (or vice versa) because growth in a specific area is trending upwards

06

Adding Non-conventional Tourist Attractions

Developing experiences that are unique to a community and destination for communities of interest to share their passions

Case Study

Iceland Tackling Summer High Season by Growing Winter and Shoulder Season Offerings

Overview

Iceland, a Nordic island nation, is a popular destination known for its stunning volcanoes, hot springs and lava fields, massive glaciers, and national parks. Before the government's influential tourism program, the three-month summer season from June through August was considered the peak profit opportunity for local businesses.

Approach

Back in 2012, Iceland introduced its Tourist Site Protection Fund, to be partly financed via income from an accommodations tax. Its purpose was to propel the development of new attractions that would capture visitors while relieving some of the pressure from existing popular spots and better protecting its precious nature sites. Iceland's marketing efforts also homed in on responsible traveller behaviour, safety, multi-seasonal offerings instead of just summer, and looked to drive visitation towards lesser-known areas of the island.

Results

In recent years, tourism has grown. The program has created a balance between summer visitor volume and newer, off-season visitation. Back in 2010, a total of 488,000 international visitors arrived in Iceland. Skipping ahead to 2017, after the funding and marketing pivots, this number had grown to 2.2 million. As of 2018, the total population was 356,991, and a record breaking 2.3 million tourists visited Iceland.

Case Study

South Africa Climatic Diversity lends Itself to Varied Year-round Tourism

Overview

South Africa is vast and diverse, with seasonal climates that greatly contrast across its regions. Cape Town and the Western Cape are known for hot and dry summer months, and wintertime rainfall from June until August. Meanwhile, the rest of the country including the highly popular Kruger National Park area has heavy storm showers in summer, followed by a dry winter season from May through October.

Approach

The country's tourism marketing aimed to promote appealing, 'anytime of year' travel offerings by diversifying the destination messaging to follow the warm weather. While Cape Town is one of South Africa's most popular tourist and city break spots, it may not hold the same appeal in winter. Meanwhile it is prime season for promoting safari trips to Kruger, Madikwe, Pilanesberg, and KwaZulu-Natal as animals venture out to find water and the land's bush is lighter, making exotic game-spotting holidays optimal.

Results

South Africa's example of marketing multiple destinations, based on the timings of the varying regional warm seasons, makes a case for the benefits of diversification. Their approach has resulted in numerous 'peak' seasons for the country's tourism industry, with these different seasons each catering to a unique traveller audience.

Seasonality Learning Checklist

- ☐ Understand your destination's seasonality and the estimated timeframe for each season.
- ☐ Learn about the factors that cause seasonality in your destination.
- ☐ Assess your mindset around the potential for winter and shoulder season tourism in your destination.

¹UNWTO. "International Tourism Highlights, 2020 Edition"

²Statistics Canada. Table 36-10-0638-01 Tourism sector's share of jobs and employment income

³UNWTO. "Addressing Seasonality in Tourism: The Development of a Prototype"

⁴Allen, Lori. "Shoulder Season Destinations: A Calendar of the Best Time to Travel."

Other Resources:

Globe and Mail. "What other tourist darlings can learn from the sudden end of Iceland's 'miraculous' tourism growth"

Nordic Council of Ministers. "Arctic tourism in times of change: Seasonality"

Go2Africa. "Best Time For An African Safari | When To Go On Safari | Go2Africa"

Southern Destinations. "Why it's Smart to Travel in Shoulder Season"

PATA. "Seasonality in Tourism Industry: Impacts and Strategies"

Module 03:

The Situation in Canada: Trends, Insights & Analysis

Key Takeaways

- Seasonality impacts tourism performance across Canada and touches on every sector.
- Domestic tourism has been the lifeline for the industry but there are many benefits to diversifying.
- Shoulder and winter season travellers to tend to choose the same activities as in the summer high season.

Featuring

- Monthly visitation and passenger trends
- Where to look for statistics
- Top winter and shoulder season market insights

In this section, we take a closer look at seasonality in Canada. The information you find here will help you understand the historical trends for hotels, international markets and airlines, and market insights.

Seasonality in Canada

Earlier, we discussed ways to spot seasonality. Within Canada, seasonality can differ slightly by province or territory, but as a country the monthly pattern is reflected clearly in the following charts.

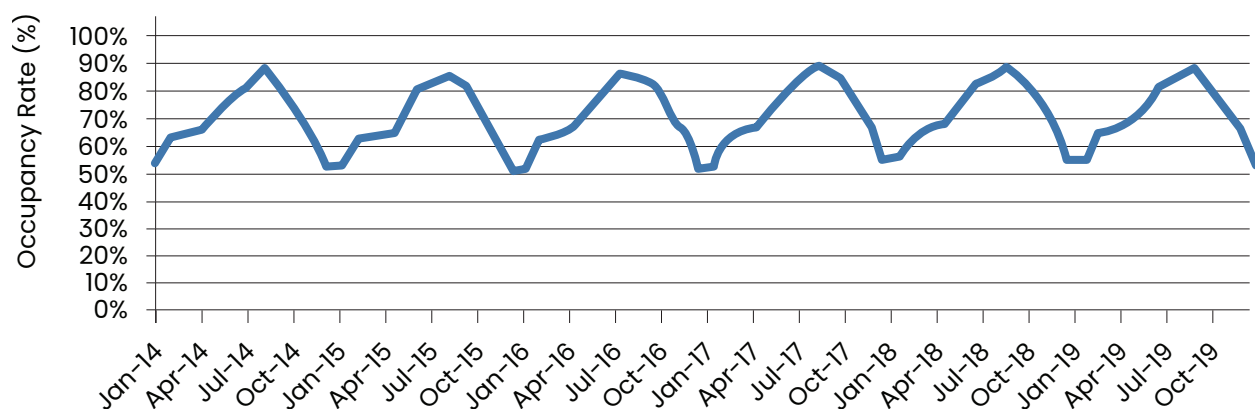


01

Hotel Occupancy Peaks in July and August ¹

This graph clearly shows the repeated pattern characterized by peaks in July and August and marked declines in the shoulder and low seasons.

Figure 3: Canada's Monthly Hotel Occupancy Rate (2014 – 2019)



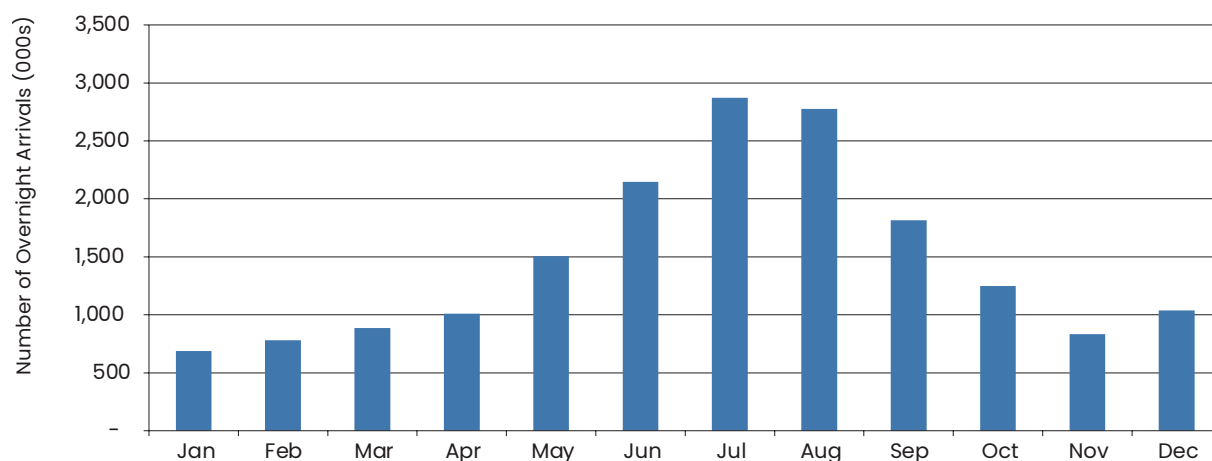
Source: CBRE. "CBRE Hotels' Trends in the Hotel Industry National Market/Operations Report"

02

International Arrivals Consistently Choose the Summer High Season²

The monthly average of all international arrivals to Canada over an almost 20-year period shows that a third of all visitors arrive during just two months of the year - the summer high season.

Figure 4: Monthly Average of Total International Arrivals to Canada (1990 – 2018)



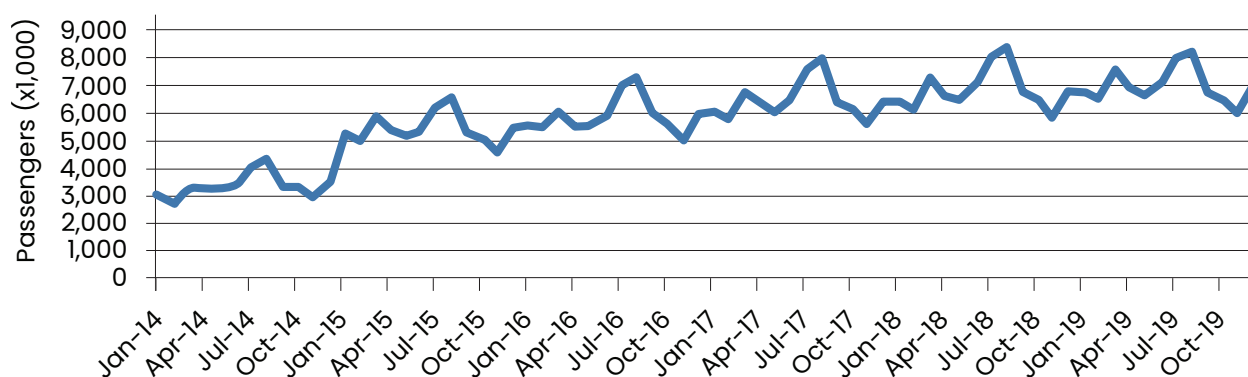
Source: Statistics Canada. Frontier Counts

03

Canada's Major Airlines Schedule Based on Peaks³

Passenger statistics from Canada's major airlines show that there are peaks year after year in the summer months. Like hotels, airlines have historically relied on measures like seasonality to plan their capacity and resources effectively.

Figure 5: Monthly Canadian Passenger Traffic (2014 – 2019)



Source: Statistics Canada. Table 23-10-0079-01 Operating and financial statistics for major Canadian airlines, monthly

Get to Know Canada's Markets

Domestic tourism has been the lifeline for the industry, since the vast majority of tourism businesses concentrate on it. However, there are benefits to diversifying. Not only do international audiences stay longer and spend more, but they may also have different travel patterns from Canadians, which helps to reduce seasonality.

Top Domestic Markets

Ontario



Quebec



Alberta



British Columbia



Keep in mind that, in addition to other Canadian provinces/territories, your most important market will be your own residents (local, regional and short-haul travellers). The list of top domestic markets can vary widely by province/territory because it is influenced by characteristics such as spend patterns, growth potential, and geographical proximity.

Top 5 International Export Markets

United States



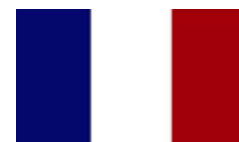
United Kingdom



China



France



Germany



The other top international markets for Canada are Australia, India, Japan, Mexico and South Korea.

Did you know that on average international travellers spend double in Canada compared to domestic travellers?⁴



Where to Look for Statistics

It's best to use a variety of sources and consider them in practical and realistic terms. There is a wealth of information based on primary research that you can use to explore travel and spending insights about markets. This includes:

Quarterly Spend Indicator Reports

Each quarter, Destination Canada publishes new data on international tourism spend in each of 10 key markets and the rest of the world. These indicators, developed by Statistics Canada, show the spending of international visitors in Canada region by region, across six key tourism spending categories.

Market Profile Reports

Destination Canada prepares reports with a brief overview of the market potential and general travel characteristics of the main international markets to Canada. The information is useful for tourism suppliers to better understand some of the market dynamics, and judge what the potential is.

Provincial and Territorial Resources

At the provincial or territorial level there are resources freely available to help operators develop an understanding of visitation patterns and travel preferences. For example, Destination BC offers an updated [interactive dashboard that summarizes trends](#).

Top Winter and Shoulder Season Market Insights

In March and April 2020, Twenty31 conducted a three-country opinion research study. The objective was to understand the attitudes of international travellers towards winter and shoulder season leisure travel within Canada, as well as the USA and the United Kingdom.

Results

01

The peak in booking during high season is most pronounced in Canada, where nearly two in five trips happen during July and August. For future trips, substantial numbers – at least two in five – suggest that they will most likely travel in shoulder season. Even if travellers do not follow through on this, this suggests there is no objection in principle to travelling outside the summer months.

02

There is substantial consensus on what high, shoulder and low season is in Canada, with shoulder season seen as April, May, September and October, as well as March by Americans. Two-thirds of Americans, and majorities of Britons and Canadians, think it likely that they would book a long-haul trip during shoulder season. Better weather and school holiday constraints are the main factors causing people to travel in high season, while those preferring shoulder low season are often motivated by fewer crowds.

03

At least in principle, shoulder season is at least as popular as high season as a time of year to travel to Canada due to perceived lack of crowds and cheaper prices, particularly among older travellers and those without children at home. However, the potential for poor weather and closed attractions are important disincentives, and school holidays are a major constraint, particularly in the UK.

04

The primary driver of destination selection for both shoulder and winter season travel is brand awareness, particularly outside Canada. It is the most familiar destinations – Niagara Falls, Vancouver, Quebec, Toronto, Montreal - that are preferred for travel at any time of the year.

05

There is little evidence here that shoulder or winter season travellers to Canada are distinct from high-season travellers in their activity profile. The activities of most interest (sightseeing, food tourism, visiting national parks) are, in Twenty31's experience, also those of interest to high season travellers. An exception may be wildlife viewing, which appears of greater interest to potential shoulder season travellers from the UK.



Case Study

Yukon Maximizes Capacity and Makes Winter and Shoulder Season a Priority

Overview

The Yukon is home to Canada's highest peak, mountainous terrain, vibrantly coloured lakes and much more. It's also made some of the country's most significant commitments towards increasing winter and shoulder tourism.

Approach

The territory's Tourism Development Strategy Action plan prioritized its need for year-round travellers, with the goal of "highlighting the unique assets that differentiate the destination from others" and maximizing available capacity during colder periods. From this came a series of supporting festivals, sports activities, special events, conferences and cultural attractions entirely focused around the winter and shoulder season months.

A 2017 summit that gathered over 100 attendees from 10 Yukon communities to discuss tourism trends and challenges highlighted accessibility as another key area needing a boost. In response to this feedback, several key improvements were enacted including a strategic airline partnership, local signage repair, and easier entry and infrastructure for backcountry trails, lakes, and rivers.

Results

The Yukon's program has created some positive results. From 2013 through 2019, their winter tourism saw strong development, including 22% growth in air arrivals (a 15,500 traveller increase at Erik Nielson Whitehorse International Airport), 21% more international overnight visitors, 13% higher retail sales, and a visitor increase of 6,800 at international border crossings into Yukon.

The Situation in Canada

Learning Checklist

- ☐ Understand the impacts of seasonality on tourism performance across Canada.
- ☐ Recognize the benefits of diversifying beyond domestic tourism markets.
- ☐ Examine which activities are key motivators for travel in the summer high season in your destinations.

¹CBRE. "CBRE Hotels' Trends in the Hotel Industry National Market/Operations Report"

²Statistics Canada. Frontier Counts.

³Statistics Canada. Table 23-10-0079-01 Operating and financial statistics for major Canadian airlines, monthly

⁴Statistics Canada. Visitors Travel Survey (2019, preliminary); Domestic from National Travel Survey (2019, preliminary release)

Other Resources:

Tourism Yukon. "Tourism Yukon 2017 Year-End Report"

Government of Yukon. "Yukon Tourism Development Strategy: Sustainable Tourism. Our Path. Our Future."

Nordic Council of Ministers. "Arctic tourism in times of change: Seasonality"

Module 04:

Winter and Shoulder Season Strategy: A 3-Phase Process

Key Takeaways

- A sound process is essential for creating a destination winter and shoulder season tourism strategy.
- Competitive opportunities and their supporting initiatives will need to be identified but also prioritized.
- You will need to bring stakeholders together to ensure you have the support of key players.

Featuring

- Strategic framework essentials
- A 3-Phase Process for winter and shoulder season tourism development
- Getting it right from the start

In this section, we will introduce a step-by-step process that a destination can undertake in order to identify key opportunities to develop and market winter and shoulder season tourism.

How to Develop a Winter and Shoulder Season Tourism Destination

Developing or enhancing a destination to support increased winter and shoulder season tourism often happens in stages to ensure that there is alignment between the supply side—the products and experiences that are available in the winter and shoulder season, the enabling environment—the leadership or policy to support the development of a strategy and, of course, the demand side to ensure that there is adequate demand from prospective markets and market segments to choose the destination. In many instances, the destinations' products and experiences as well as their target markets will be similar to those found during the high season while in other instances, a whole new set of products and experiences and potentially new target markets will need to be identified. To make it easier to identify opportunities, we have developed a strategic framework.



What is a Strategic Framework?

A winter and shoulder season tourism strategic framework will serve as your destination's blueprint. It's your step-by-step guide to organize priorities and initiatives into strategic drivers that build up to the vision you create.

Why do You Need One?

- Solidify a long-term vision for winter and shoulder season tourism development
- Ensure the guiding principles that direct the vision are in line with existing tourism guiding principles
- Address the challenges and opportunities for developing winter and shoulder season tourism
- Help to create a list of opportunities for the destination based on lead driver(s)
- Detail specific initiatives that can be undertaken by a destination to develop its winter and shoulder season over the designated period
- Outline a roadmap for execution of the strategy

Without a strategic framework your destination runs the risk of lack of direction and focus, inconsistent messaging, too many projects, and a potentially weak strategy.



Figure 6: A Winter and Shoulder Destination Strategic Framework

Guiding Principles	<ul style="list-style-type: none"> Values that guide tourism stakeholders in the development of winter and shoulder season tourism products and experiences
Challenges & Opportunities	<ul style="list-style-type: none"> Considers barriers identified in winter and shoulder engagement sessions as well as opportunities to address those barriers
Vision	<ul style="list-style-type: none"> Ensures alignment of the direction for winter and shoulder tourism that reflects industry demands, potential visitors, operators, and the communities that tourism serves
Objectives	<ul style="list-style-type: none"> Accomplishes a destination wishes to achieve its vision as it develops winter and shoulder tourism – the ultimate outcome
Pillars	<ul style="list-style-type: none"> Themes that become high-level speaking points to describe the focus of the strategy
Lead Opportunities	<ul style="list-style-type: none"> “Big idea” or “big opportunity” where there is a competitive advantage Can be supply driven reflecting a certain currently underleveraged competitive opportunity Can be demand driven like an under targeted group of prospective customers Prioritized in order of ease of implementation and impact on tourism objectives
Supporting Initiatives	<ul style="list-style-type: none"> Complements the lead opportunity Ensures conditions for success are met and there are sufficient resources to develop the lead opportunity Can include ensuring there is sufficient tourism infrastructure to support the product Can include developing a profile, size of market and characteristics of those who might be willing to travel to the region

What is a Strategy?

There are many definitions of “strategy”. We prefer the simple and long tested definition from Michael Porter published in the Harvard Business Review from 1996 which states that strategy is really about positioning a product or experience differently from competitors or performing similar activities in different ways. He goes on to state that the product or experience must deliver greater value to customers or create comparable value at a lower cost or do both. In terms of destinations developing a winter and shoulder season tourism strategy, it would seek to find out where a destination holds a competitive advantage —whether it is in a unique product or experience (e.g., dog sledding, ice fishing, snowmobiling), a geographic location (e.g., natural hot springs, Northern Lights, lakes and rivers, water falls) or an enabling environment (e.g., a designation such as a world heritage site, casino license, government support for tourism development).



Why do You Need One?

Strategies help to choose where your competitive opportunities may lie and where to focus your limited human, technological and financial resources. But equally importantly, strategies help you say “no” to ideas that might be good, but are not consistent with the focus that a strategy can provide.



The 3-Phase Process for Winter and Shoulder Season Destinations

By following this process you can develop a 24 to 36-month plan to develop and enhance your destination's winter and shoulder season tourism.

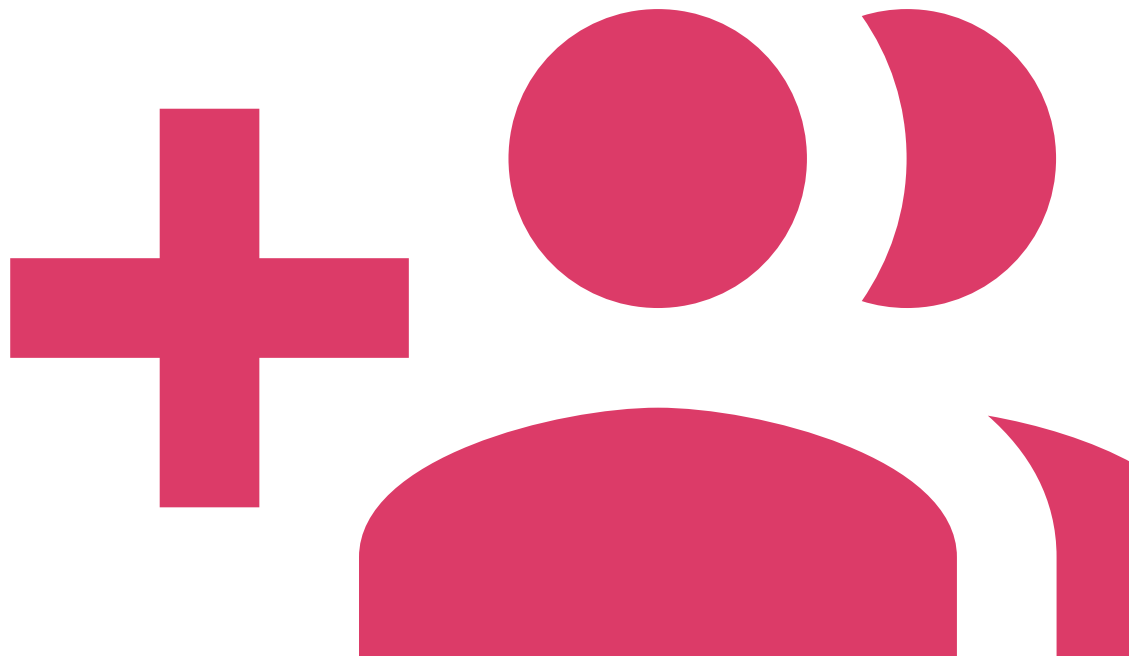


Who Should be Involved in Planning?

Define the roles and identify team members that represent different areas of your organization and can help strategize.

The strategy development team should include:

- Strategic planning lead to champion the strategic framework
- Leadership team members such as the CEO and senior executives
- Team members from marketing, product development and research



What Are the Phases?

Because all organizations are different you may decide to speed up or slow down each phase and the steps involved. The full development process can take between 2 to 4-months but its best to move at a pace that works for your team.

Figure 7: 3-Phase Process



Phase: 01

Gather

Situational Analysis

This involves an extensive review of background documents, including strategic plans, frameworks, tourism statistics (e.g., visitation, occupancy data), segmentation profiles, relevant annual reports and research studies. Doing so will help the team leading the strategy development process to understand the destination context, what has been done to date, the scope of previous projects, and the gaps and questions that need to be answered. This review will help reveal primary sources of growth and possible constraints.

For e t s



Stakeholder Engagement

Tourism does not operate in a vacuum. Operators and DMOs alike require the collaboration across multiple stakeholder groups to develop, package and market the destinations, tourism products and experiences. Because of this, it is important to gather key stakeholders to develop those opportunities together so that each stakeholder has a stake in the project's success.

Winter and Shoulder Season Workshops. Following the situational analysis, bring together tourism stakeholders to build awareness about winter and shoulder season tourism and learn about the unique challenges and opportunities being faced in the destination. It is essential to include different types of stakeholders to get full and complete input into the process.

Questionnaire. There are many tools to garner the views of key stakeholders. One of those channels is a questionnaire to gather information, viewpoints and opinion on a variety of topics related to the development of winter and shoulder season tourism. Questionnaires, or surveys, can be an important way to gather measurable “quantitative data”, and important particularly when viewpoints from a large number of stakeholders are required (i.e., residents, businesses, etc.).

Interviews. Interviews are another tool that researchers and project managers have to gain perspective from key stakeholders. These are often “qualitative” in nature and give an opportunity to elaborate on answers (as surveys don't always gather the “why” of their response). They give us an opportunity to dig deeper into insights.

2025

Visioning Workshop

The next critical step is to build a core group of stakeholders that can participate in a visioning workshop to support development of the strategy. This group of stakeholders will have attended the winter and shoulder workshop and be willing to lend their voice to the tourism strategy discussion. Aim to invite the gatekeepers (those who control access to specific resources) and influencers (those who have a unique perspective or specific opinion) in your destination. During this workshop, stakeholders will work together to draft guiding principles, challenges and opportunities, vision, strategic goals and objectives for winter and shoulder season tourism.

3



Costs

Types of Stakeholders

Who

Operators

Information or Perspective

Often product or experience developers, accommodation providers, transportation networks or other stakeholders integral to providing the assets and often the reason to visit a destination.

Economic Development Managers

The role that tourism development can play in the sustainable economic viability of their communities.

Funding agency representatives

They are important stakeholders to help navigate funding sources that frequently have criteria to meet in order to apply for development funds.

Local government representatives

Local government may hold the keys to policy changes that may be required. They may also be the interface for regulatory authorities, special licenses, support for building public infrastructure.

Regional and provincial tourism leaders

Local and community DMOs often belong to or work closely with regional and provincial tourism organizations, which also develop strategic priorities and may have additional funding that can support initiatives.

Community groups

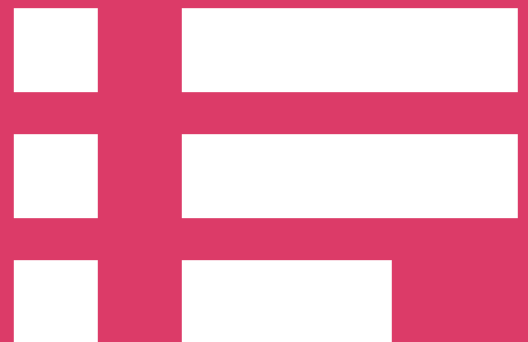
Community groups can be supportive in developing tourism opportunities. Sports organizations for instance can consider hosting tournaments and events. In addition, recent years have seen community groups in some destinations become loud advocates against tourism growth, particularly in destinations experiencing over tourism.

Associations

Associations, like community groups can be supportive or challenging of tourism initiatives. It is important to keep them apprised of all tourism opportunities and seek their support and engagement.

Some Workshop Tips

1. Set the date and length. Anywhere between 1 ½ and 3 hours is typical.
2. Locate and reserve a venue with adequate space, natural light and tables and chairs. If conducting a virtual workshop, test your platform options and create a meeting link.
3. Draft an agenda to move through the workshop objectives.
4. Tailor your presentation for the audience.
5. Present your situational analysis and findings from the winter and shoulder workshops.
6. Invite participants to introduce themselves.
7. Review the agenda and set participant expectations.



Phase: 02

Assess

During this phase, the strategy development team will begin to identify and prioritize opportunities to develop winter and shoulder tourism in the destination.

Initial Assessment

After the Phase 1 stakeholder engagement and visioning workshop is complete, the strategy development team will review and summarize what was learned during the discussion. Each of the destination and management drivers will be carefully analyzed to see where opportunities with the highest likelihood of success lie relative to the amount of human or financial resources required to achieve that success.

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Innovation Lab

The second workshop, with the same core group of stakeholders, will assess opportunities in greater detail to prioritize the identified opportunities down to 2-3 for further exploration. This workshop will help confirm that the outputs accurately reflect the discussion and the industry's needs. This workshop offers the added benefit of keeping stakeholders engaged for future implementation partnerships.

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Phase: 03

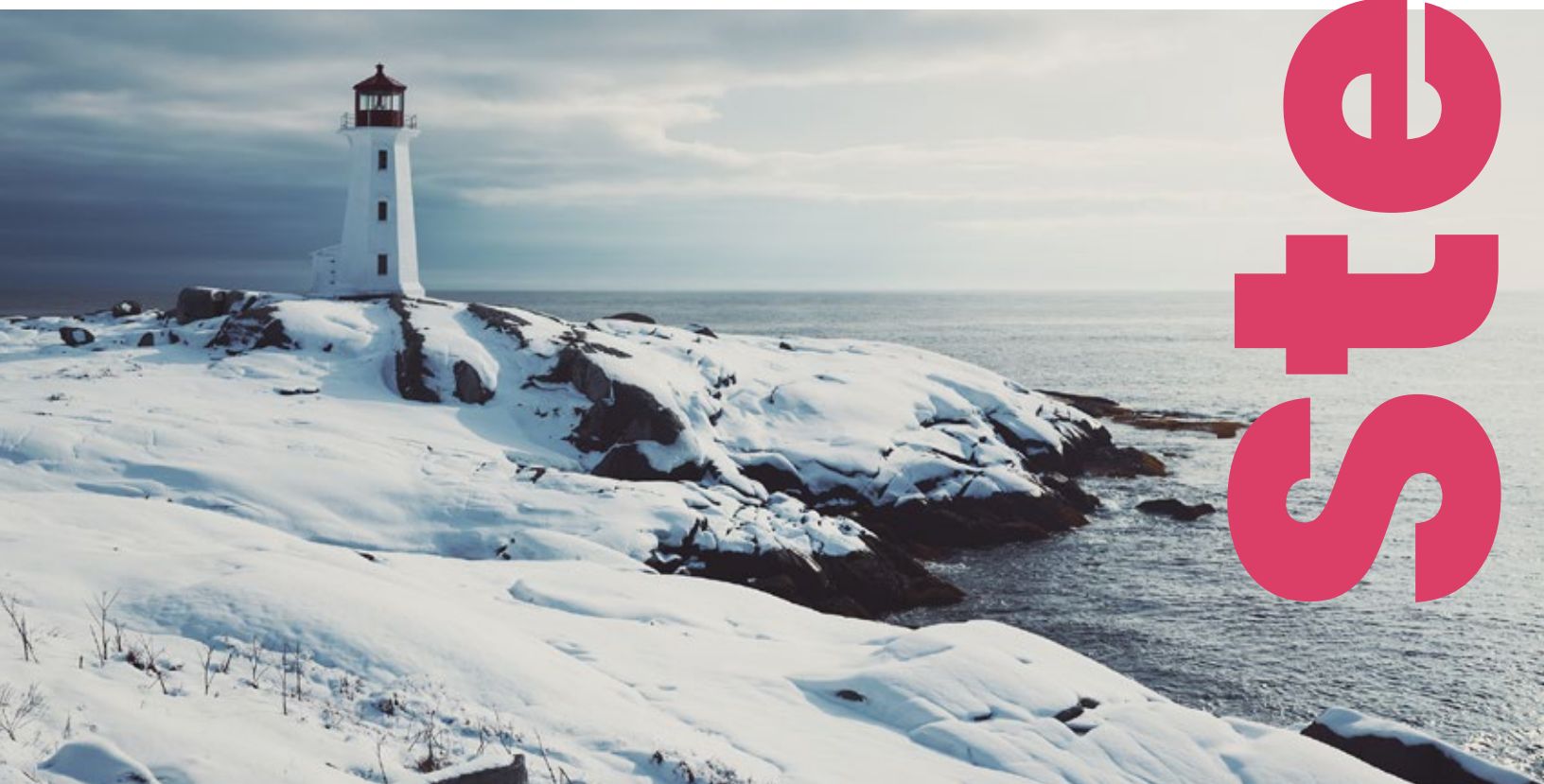
Recommend

The ultimate goal during the last phase is to finalize the strategic framework and share it with destination leadership and stakeholders.

Develop Strategic Framework Draft and Review

After the opportunities are prioritized based on ease of implementation and impact on objectives they can be drafted into a strategic framework that summarizes the overall development plan. At this point, a discussion with destination leadership will need to take place to review the winter/shoulder season strategic framework to see where challenges could arise and how the ideas add value.

602est



Recommend

After considering the feedback received, you can now work towards creating your final strategic framework. Lastly, present the final strategic framework to destination leadership and key stakeholders.

7 o p e t s



Putting it All Together

Now that we've covered the step-by-step approach to winter and shoulder destination development, let's dive deeper in. We've developed a series of building blocks for a destination to develop or enhance new products or experiences or new markets for winter and shoulder season tourism.



1. Guiding Principles

Guiding principles shape the decisions taken to develop the destination. Often, they reflect the role of tourism in the community, and the impact that tourism can have (positive and negative). For instance, the following are the guiding principles for a tourism master plan developed by a major city in Canada. They inform the rest of their strategy and objectives:



2. Challenges and Opportunities

Challenges

Every destination has challenges that impede their ability to achieve their objectives. Challenges often cited include access to trained labour, Wi-Fi availability, air access, shared accommodations policy, ride sharing, marketing budgets and infrastructure support. Challenges can range from categories of supply side—availability of products and experiences, to demand - identifying and addressing the needs of a target audience - to the enabling environment like prioritization of tourism by government and funding availability. Some of these challenges can be addressed easily, while others may take several years. But challenges that are not recognized as impediments to achieving objectives are never addressed.

It is important to document and reflect on these challenges as they can play a role in determining the viability of opportunities.

Opportunities

Like challenges, every destination also holds untapped potential. These can also be on the supply side—geographic assets like lakes, beaches and mountains or experiences like ski slopes, golf courses or even Niagara Falls, cultural assets like museums, and historic buildings. They can also be based on demand—access to a large city target audience or market segment like seniors, LGBTQ+ community or families. Finally, opportunities can lie within a destination's enabling environment, like special designations (biospheres) or infrastructure like convention facilities, cruise ship ports and parks. Clearly, opportunities are most often unique to specific destinations and every destination will have opportunities that can provide them with unique competitive advantages.



3. Vision

A vision for a destination, and in particular for developing winter or shoulder season tourism is how a destination would like to see itself over a time period. Many visions are for a ten-year period. They help determine the gaps, the challenges that need to be mitigated and the opportunities that can be leveraged in order to achieve that vision. Visions should also be aligned with the guiding principles to ensure opportunities line up with the values set out in the guiding principles. For instance, Destination Canada's vision is the following:

Our vision is that together,
we create the next era
of travel, inspiring those
with glowing hearts to fall
in love with Canada.

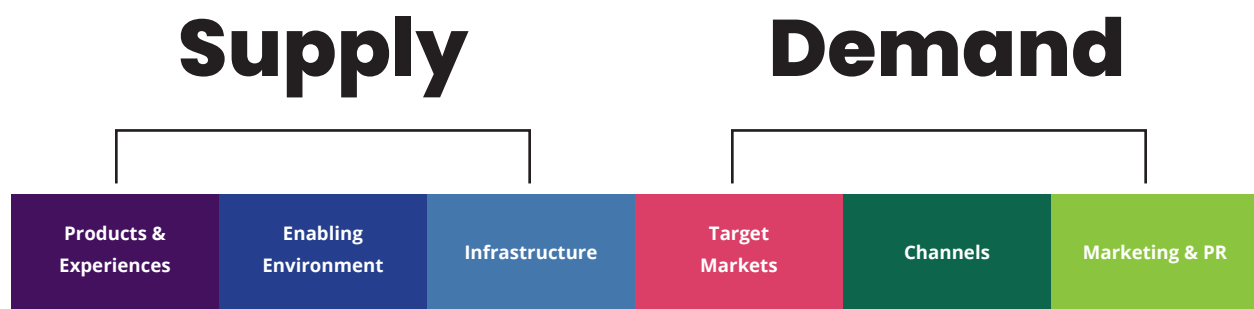


4. Lead Opportunities

Lead opportunities are those that help focus or prioritize the tourism opportunity. There may be dozens of opportunities for a destination that could be considered to develop a winter or shoulder season destination.

Opportunities can be driven by supply (the products or experiences we currently have that may appeal to prospective visitors) or demand (a market segment for which there is potentially unmet demand).

Figure 8: Supply or Demand-driven Opportunities



Supply-side opportunities include those natural, cultural or developed resources or a capability where the destination or the operator may hold a competitive advantage. These could range from snowmobile trails, dark skies or a particular cultural asset like a museum.

Demand-side opportunities include identifying a particular source market, target market segment or unique marketing channel, determining their needs or interests, and then compelling and inspiring them to visit through specialized channels (tour operators, travel agents, travel influencers) and direct to consumer marketing channels.

Within supply and demand drivers, opportunities can also be categorized as lead or supporting.

Lead Drivers:

- The “BIG IDEA” or the “BIG OPPORTUNITY” where the destination may have a competitive advantage because they have identified a driver of tourism demand, or may be blessed with a special attribute like a geographic feature, a cultural feature or even a special designation like a world heritage site.
- A lead opportunity can be supply-driven, reflecting a certain currently underleveraged competitive opportunity like “beaches” or a museum
- It can be demand-driven, like an under-targeted group of prospective customers (e.g. seniors from the US seeking a getaway)

Supporting Drivers:

- Ensures conditions for success are met and there are sufficient resources to develop the lead driver opportunity
- Could include ensuring there is sufficient tourism infrastructure to support the product
- Could include developing a profile, size of market and characteristics of those who might be willing to travel to the region



Tool: 01

How to Prioritize Opportunities

Here is a general process you can follow to help stay on track:

Step 1: Developing Opportunities for Consideration

Answer the following question

"We may have a competitive opportunity to develop or enhance winter or shoulder season tourism by....."

Example

Demand Side Lead Driver - Seniors in Atlantic Canada

Proof point

Seniors seeking opportunities for bus trips and getaways. Though more research is required to determine the unique demands and characteristics of this untapped audience, preliminary evidence suggests they are seeking small towns and communities, and are interested in seeing local history, museums, sights, local food, local crafts and enjoying shared experiences with other seniors.

Supporting Drivers - more research require

- Enabling Environment (Commitment from DMO and industry)
- Product and Experience Development (additional experiences; ensuring shops, museums, restaurants, pubs open)
- Infrastructure (addressing some mobility issues, parking for coaches)
- Channels (local tour operators, packages, Media FAM, Travel Trade FAM)
- Marketing and branding (communications, market position, advertising, launch)

Step 2: Choosing One or Two Opportunities

- Opportunities Prioritization Matrix

How do I choose the right opportunities? We have developed a framework to evaluate and prioritize the opportunities that are most likely to succeed. Opportunities that are both easy to implement and offer a high likelihood of success will be prioritized first. This framework is based on determining two areas—ease of implementation and impact.

Figure 9: Opportunity Evaluation Matrix

Ease of Implementation

		1	2	3	4	5
	Impact on sustainable growth	Very Weak	Weak	Neutral	Strong	Very Strong
1	Extremely Impactful	Moderate Opportunity	Moderate Opportunity	Important Opportunity	Priority Opportunity	Priority Opportunity
2	Very Impactful	Low Opportunity	Moderate Opportunity	Important Opportunity	Priority Opportunity	Priority Opportunity
3	Relatively Impactful	Low Opportunity	Moderate Opportunity	Moderate Opportunity	Important Opportunity	Important Opportunity
4	Not Very Impactful	Low Opportunity	Low Opportunity	Moderate Opportunity	Moderate Opportunity	Moderate Opportunity
5	Not at All Impactful	Low Opportunity	Low Opportunity	Low Opportunity	Low Opportunity	Moderate Opportunity

Tool: 02

Assessing Market Readiness

Twenty31's opportunities prioritization matrix will help identify which opportunities to focus on in the immediate and in the longer term.

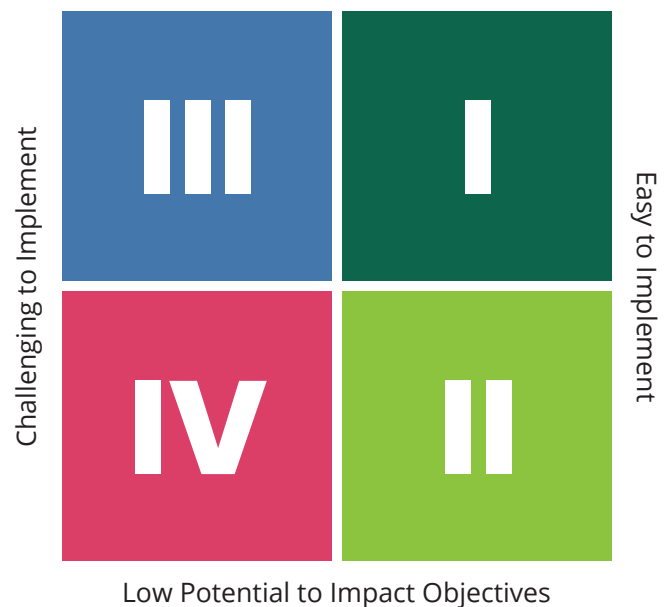
How to Read This Table:

- Prioritization of opportunities based on qualitative impact on objectives and ease of implementation
- All identified opportunities require additional assessment and research
- Identified opportunities are not static to one quadrant - they are dynamic with the hope that most opportunities will shift to quadrant I

The Quadrants:

- I. Near market-ready
- II. Quick wins for next 1-2 years
- III. Medium-term opportunities for next 2-4 years
- IV. Opportunities for later consideration/re-evaluation

Figure 10: Opportunity Prioritization Matrix



5. Supporting Initiatives

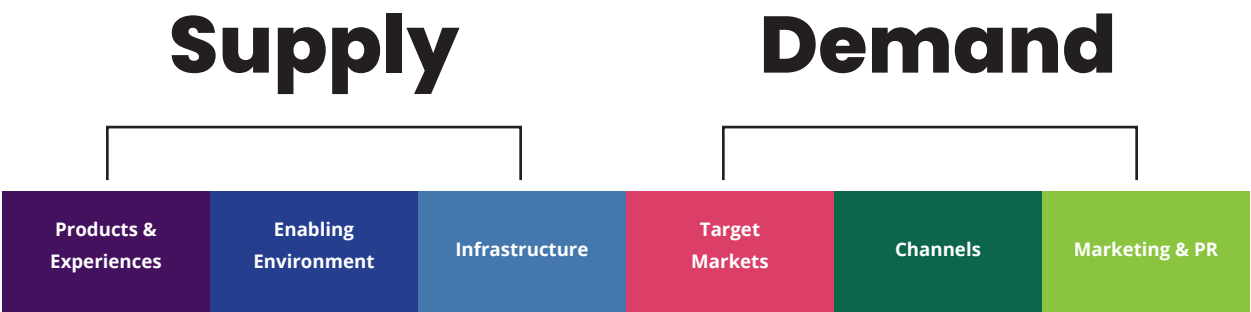
All lead initiatives will require some back up. If the “lead” is a product or experience, then the supporting initiatives might be supporting infrastructure, and a marketing campaign to support the development of the experience.

The supporting initiatives will help to achieve the lead opportunity after market research and development of the business case. Supporting initiatives include a short description and may become part of the “to do” list for multiple stakeholders.

Getting it Right From the Start

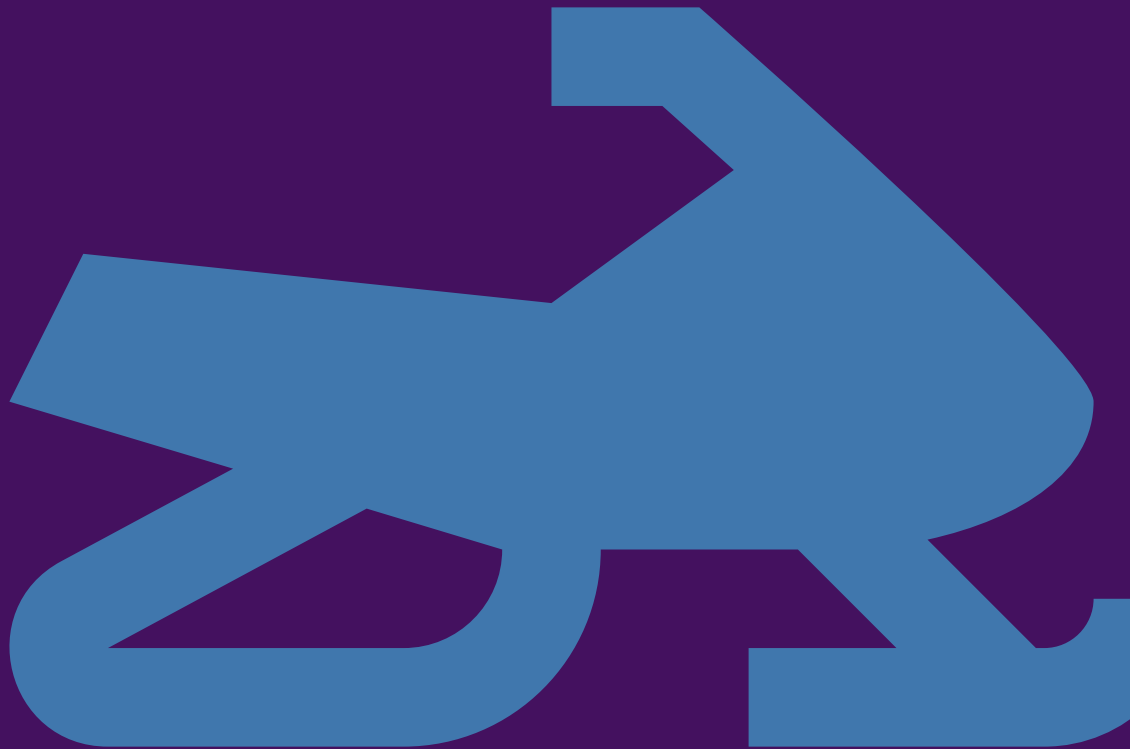
The following section presents some of the insights we learned during the 40 workshops delivered across Canada. Some areas will provide you with new knowledge and others include winter and shoulder season specific action items for your team to consider in your discussions.

Figure 11: Supply or Demand-driven Opportunities



Products and Experience

Products and experiences are the lifeblood of a tourism destination. They are the “things to do and see” at the destination. They don’t all necessarily need to be big tourism experiences like a theme park or museum. Products and experiences playing a supporting role can even be a bakery, a local specialty shop or a farmer’s market.



Demand-generator Inventory

All demand generators likely require additional research to determine their potential but at this stage, identifying key demand generators for a destination or operator can help narrow down opportunities. An inventory of products or experiences will help to define where there may be potential demand or where a destination or operators hold a competitive advantage.

New or Enhanced Products and Experiences

Demand generators can be new or enhanced products or experiences. Those that can be most effective meet a recognized need of a particular target audience (e.g., seniors, families with children, little league players, or business travellers). Demand generators can also reflect a unique attribute of a destination, like Niagara Falls, a historic downtown or sports facilities.

A quick checklist can help identify some product or experience demand generators:

- Does the product or experience potentially hold a competitive advantage?
- Is there demand for this experience from our target markets or new markets?
- Is there evidence that other destinations have had success with certain target markets?
- How influential is this product or experience when choosing the destination or operator?



Events, Tournaments, Sports Tourism

Developing new events can be a valuable tool for creating demand in the winter or shoulder season. Events and sports tournaments can be strong demand-generators. Long-standing events have been developed and nurtured in the high season and then moved to the shoulder or winter seasons to support periods of visitation challenge for a destination. In other instances, new events are created in the shoulder or winter seasons. Like products and experiences, events that are successful are those that possibly leverage a key attribute of a community like a robust music or arts scene, culinary scene, sports facilities, or natural features like parks. Other events can attract certain target audiences like motorcycle rallies, chess tournaments or events for the LGBTQ+ community.

Communities of Interest and Niche Experiences

Communities of interest refer to characteristics of some target segments that seek to travel to destinations to enjoy their passions with like-minded people. These range from avid quilters meeting for “knitting weekends”, to star gazers, to those who enjoy recreating historical events. Some destinations may consider if they have any special attributes that could provide a unique competitive advantage to attract certain communities.



Collaboration and Partnerships

In many destinations, the right products and experiences already exist, but the tools are lacking to link those experiences through packages and itineraries that may appeal to certain target audiences. In this case, the destination can use its asset inventory of all experiences with operators and align them through events, collaborative workshops or through digital tools to package experiences to be sold through multiple channels.



Support

The enabling environment captures the general settings for operating in a destination and the success factors and obstacles to competitiveness, including the policy environment for tourism businesses to operate effectively in the winter and shoulder seasons.



Destination Leadership

How much a destination prioritizes developing winter and shoulder season can make or break its success. Upgrading infrastructure for winter activities, putting in place funding programs to encourage innovative products, and executing international marketing campaigns are just a few of the tasks that are needed to succeed, and many will go beyond the scope of a DMO.

Ideas to consider

1. Assess leadership positions and skillsets based on your own set of community growth areas, challenges, gaps and advocacy issues.
2. Launch a dedicated winter and shoulder season tourism-working group.

Tourism Strategy & Prioritization

The best way to demonstrate that winter and shoulder season is a priority is to develop a plan and put it writing. This will allow the necessary funds to be allocated to boost resources, coordinate actions and launch development projects. This can help to attract large-scale investment and eager entrepreneurs.

Ideas to consider

1. Develop a winter and shoulder strategic framework and strategy.
2. Incorporate and prioritize winter and shoulder season for development in your destination's overall tourism strategy.

Leadership Communication

Destination leadership has to take on a lead role in advocating for winter and shoulder season tourism across all key stakeholder groups, including with other levels of government, PTTIAs, private sector developers, and investors. With strong networks in place, destinations can help overcome longstanding barriers and bottlenecks such as labour shortages and limited transportation.

Ideas to consider

1. Create a communications plan/campaign. Provide interesting status updates on progress, blog about results, post on social media and send out inspiring industry newsletters.
2. Highlight what is happening with tourism in the destination (stimulate demand) and how stakeholders can support the tourism economy (develop supply).

Regulatory

There are many government policies, guidelines and regulations that affect tourism, no matter what the size of business or type of organization. Some regulations will impact the viability of starting a winter-focussed business while others may limit the development of an experience geared to the winter or shoulder season. There may be good reasons for some but others may unintentionally create barriers for tourism growth.

Ideas to consider

1. Identify and review challenges and opportunities related to the policy and regulatory environment during the winter and shoulder season from the perspective of sub-destinations and operators.
2. Support the identification and registration of products and experiences for specific designations or certifications e.g., designation as a dark skies area (Yarmouth, Nova Scotia) or a historic site.

Labour

The labour market affects the way businesses in your destination operate. For example, more young people will enter the workforce with fewer openings available due to COVID-19.¹ At the other end, in recent years more seniors have been seeking part-time and flexible employment. Destinations that recognize the challenges and strive to create more fulfilling positions will be able to attract skilled and engaged workers that align with the growing needs of operators.

Ideas to consider

1. Identify, review and communicate labour challenges and opportunities for sub-destinations and operators.
2. Develop professional development initiatives (e.g., courses, certifications) to train and recognize tourism workers as experts in areas related to winter and shoulder season experiences.
3. Foster partnerships with universities/ colleges with tourism and hospitality programs to connect operators and students for co-op programs, internships, and work placements.

Resident Sentiment

Globally, and within Canada, resident sentiment towards tourism has weakened due to the COVID-19 pandemic. By continuously monitoring resident sentiment towards tourism in the winter and shoulder season, destinations can explore emerging and growing concerns related to quality of life, health and safety, the environment and more.

Ideas to consider

1. Conduct resident sentiment surveys to measure attitudes and support towards tourism across a collection of categories. This can be done via telephone, an online survey methodology or consumer research panel for large studies.
2. Include residents in your destination's tourism working group to give them a voice and engage in debate.
3. Develop a robust communications plan/ campaigns that tackle the negatives and positives to improve positive feelings towards tourism. Happy residents will make better ambassadors.

Funding

Great ideas will need the right resources such as time, staff and funding. Be the hub that connects tourism organizations with funding programs and also make it a priority in your budget.

Ideas to consider

1. Identify potential sources of funding. Local and provincial DMO's, regional economic development agencies (like ACOA, Western Economic Diversification, Fed Nor, etc.), provincial government business initiatives, private sector funding options, etc.
2. Identify, review and communicate all winter and shoulder funding options for sub-destinations and operators.
3. Allocate funds in your budget for dedicated team members to support winter and shoulder season growth (e.g., travel trade specialist).
4. Create targeted winter and shoulder season development funds based on unique needs (i.e., product development, market research, facility upgrades).



Infrastructure

Infrastructure within cities and communities are often big-ticket item capital investments made by a region to support community development or economic development. These are also often funded through multiple government authorities including regional governments, provincial and even federal governments. In some cases, infrastructure can include some aspect of private sector investment as well. These are known as PPP (Public-Private Partnerships). Examples include sports and recreation facilities, convention centres, cruise ship terminals, ports and museums. A region's infrastructure can sometimes dictate where possible investments could be made in winter and shoulder season tourism in order to develop its potential.



Destination Access

Improving access to a destination is critical for attracting new visitors – if it's not easy to get to, travellers may choose to go somewhere else. Are you a regional hub? Do you have new ports? Are you able to attract international flights? These can all become competitive advantages. Your unique opportunities can determine which markets are most promising and what else is needed to grow them (e.g., higher quality/more hotels).

In some instances, few direct air routes from domestic and overseas markets may hamper growth. There are ways that destinations can enhance air service. It is now common for communities to give airlines incentives like:

- Revenue guarantees
- Cash payments
- Marketing support
- Fee waivers
- Facility improvements

Transportation by car is frequently used for flexibility and cost. Making sure roads are safe for travel is a basic and important requirement. DMOs can work with stakeholders to prepare road safety guidelines and communications plans for businesses to share with travellers to reduce risk.



Intra-destination Transport

Having a variety of transportation modes will make it easier for travellers to get around. To help deliver on the above you will need to influence transportation planning efforts at varying levels to overcome barriers to growth. While a number of issues may be higher profile, such as major investments, there are likely small-scale issues that can have an impact. Areas to assess include:

- Taxi services
- Uber/rideshares
- Public transit routes
- Car rentals
- Bike shares/rentals

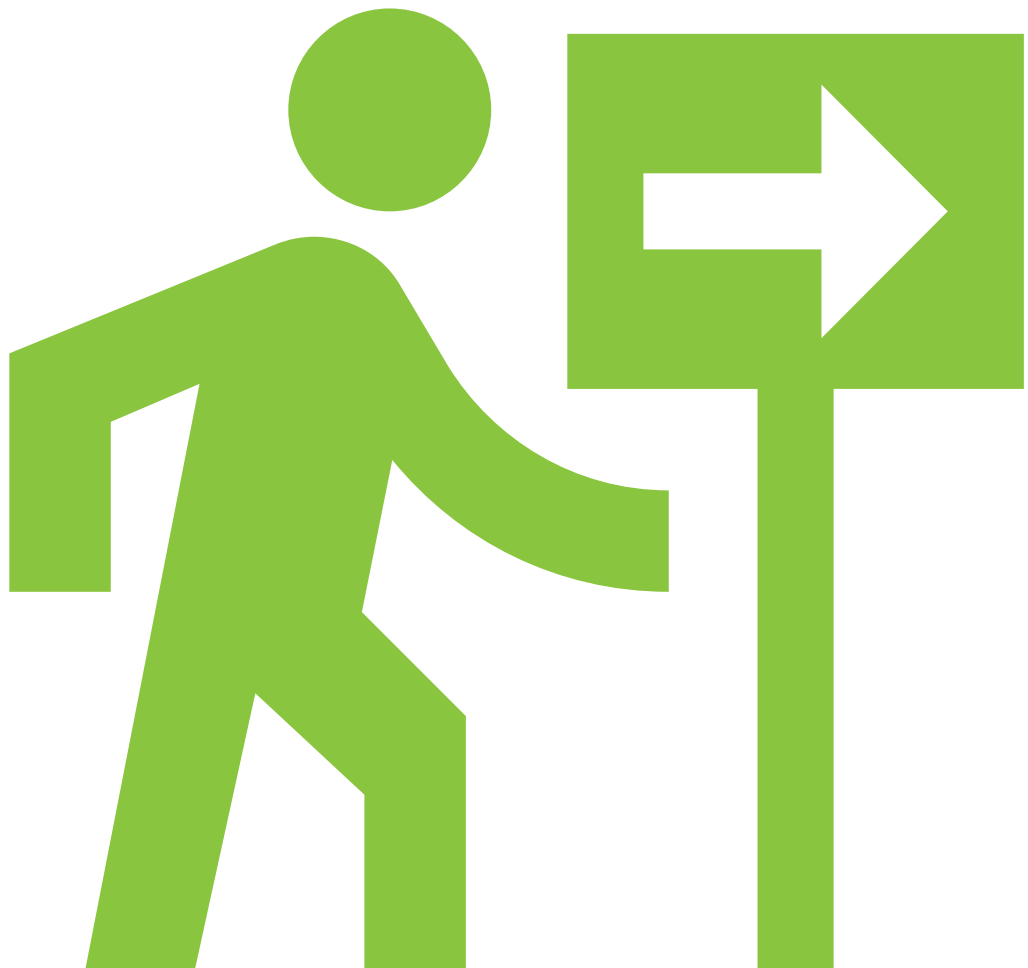
A key task will be to present the importance of transportation links between destinations and then communicate their value.



Wayfinding

Wayfinding is all about being a good host and pointing visitors in the right direction. It can enhance a destination's image and also boost awareness about things to do. The first step to creating effective signage is understanding where the problems are. An audit of existing signs, a plan for where new signs will go will and tourism attraction criteria will be the first steps.

Google Maps are vital and can help visitors get to a destination. Digital signage can step in to help visitors find exactly what they are looking for. Both are important tools. DMOs can play a role by providing training resources for operators and reiterate ways to boost their presence (Google Business Profiles).



Markets

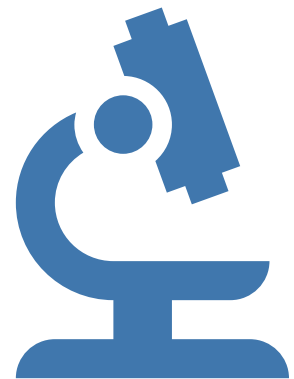
Source markets are defined through a multitude of criteria ranging from age, income and education to geographic proximity to lifestyle choices to hobbies and activities that a prospective customer might enjoy doing while travelling. If the primary target market criteria are geographic, your plan will be based on reaching those prospective travellers based on proximity to your destination or ease of access. If it is demographics (age, income, education, etc.) then you can attract visitors that might meet certain demographic criteria (families or seniors).

Source markets can also be determined by psychographic characteristics, which tell you “why” a customer might choose your destination or experience. For instance, they may want a quiet contemplative vacation or an opportunity to learn or pursue a hobby. Or your source markets may be based on lifestyle. The fact is that no one single segmentation or source market is sufficient and market research can help better link source markets to a destination or experience.



Market Research

Regardless of the choice of lead or supporting experiences from the supply side or demand, it will be important to conduct market research to validate your assumptions, further define the characteristics of the target markets, quantify the size of the market and support the development and refinement of your product, experience or event to reflect their demands.



Geographic Markets

Your market research will help you to determine which geographic markets align best with your destination and the experiences being offered. The mix of local, provincial, regional, domestic, and international markets will depend on the objectives you set. You will need to consider things like size of the market, spend, length of stay, access and the strength of relationships with the travel trade.



Communities of Interest

Travellers are motivated by all sorts of factors. Having a grasp on those motivators will help increase your success. In a competitive marketplace, some destinations take the route of focussing on the interests of small, passionate traveller segments. If you can connect your destination to a passionate community that appreciates the experience you provide it's more likely to lead to loyal visitors. These communities may have nothing to do with typical winter or shoulder season activities at all. They instead are driven by their interests and a desire to learn, connect and explore – think wine, chess, yoga, Harley enthusiasts.



A small company transformed sleepy Hamilton, Missouri into a quilter's paradise through the power of YouTube. Owner of Missouri Star Quilt Co., Jenny Doan, started her career selling quilts and running a website that sold pre-cut fabric. To grow sales Jenny started making her own YouTube videos on quilting. The videos become hugely popular and quilters now come from all over to come meet her and shop at her store. More quilting stores have popped up in the town, in addition to restaurants and a microbrewery."

- Quilting Capital

[Read More](#) 



Channels

Tourism typically has many tools or channels to reach prospective visitors. These can be broken down to two major channels:

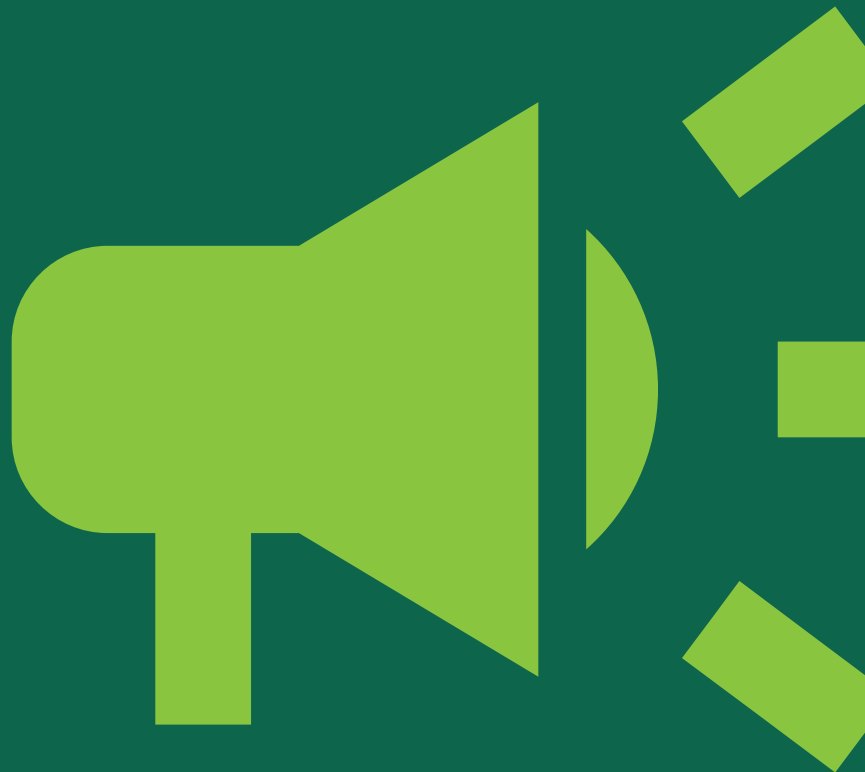
1. **Direct to consumer.** Direct to consumer marketing and advertising can be an effective way to communicate directly to a prospective traveller. These channels can include digital and print advertising, TV spots, through your own website and other advertising channels. The challenge with direct-to-consumer advertising is the expense, and the level of influence advertising can have on consumers.
2. **Intermediaries.** This approach is increasingly popular in tourism marketing. Intermediaries can include media (travel media, lifestyle media), bloggers or social media influencers to help tell your destination or experience story through what may be perceived as more credible or influential channels. Intermediaries can also be packaging your destination or experience through the travel trade, which include tour operators and packagers (which increasingly include digital packagers), through online travel agencies (OTAs) and travel agents.

How will you reach travellers? Which channels will you use? These questions are essential to understanding what kind of actions you will take and the necessary investments.



Marketing

Marketing and promotions are one of the final elements of developing a winter and shoulder season opportunity. This might include marketing a package or product or experience in a destination to reaching a specific target audience. It can also be branding the destination to ensure that target audiences put the destination on their short list when seeking an opportunity to travel. Finally, other marketing tools, like media relations, travel media, lifestyle media, social media and influencers can play a significant role in creating awareness and to compel and inspire visitors to the destination.



Winter and Shoulder Season Strategy Learning Checklist

- ☐ Make a commitment and build your team for strategy development.
- ☐ Collect your background documents, gather statistics and other relevant information.
- ☐ Start identifying stakeholders for participation.

¹Tourism HR. "COVID-19 Impact on Tourism Employment to 2025"

Other Resources:

Travel Pulse. "The Ghost Town Saved by Quilts and YouTube"

Module 05:

Supporting Winter and Shoulder Season Tourism: Tips for Operators

Key Takeaways

- It takes leadership, skill and determination to expand beyond the high season.
- To be successful you have to do some thinking and craft your plan.
- Working in partnership with others can be a rewarding experience.

Featuring

- Discover your big idea (or small idea)
- Simplify winter and shoulder travel
- Create buzz for your business and destination

By now, you may have some ideas you'd like to pursue and are ready to take the leap into the winter and shoulder season. Getting to the next level will involve assessing your business and opportunity, taking the visitor's view and working with your DMO and other tourism stakeholders. Take a read through our top 20 tips and then use them to design your approach.

What's Your Strategy?

If you want to stand out from other businesses and destinations and connect with potential visitors, you'll need to start by crafting a clear strategy.



Tip: 01

Get to Know Your Destination

Take a closer look at your destination to learn everything you can about the industry – how it works, who’s involved and what makes your destination unique. A great place to start is by checking plans and resources that are already available or are in the process of being developed through your DMO or local authorities. Look for:

- Winter and shoulder tourism destination strategies, frameworks and action plans
- Brand or marketing toolkits
- Product development strategies

Lo

o p i t



Worksheet: 01

Destination Dynamics

01 My destination has the following tourism products/services experiences that are unique (USPs). Why are they unique? (lakes, historic downtown, sports facilities, festivals and events etc.)

02 What are some of my destination's strengths and opportunities? (dark skies, museums, traditions etc.)

03 Is there a cluster or critical mass of activities to draw visitors to my destination area during the winter and shoulder season? (arts trails, breweries, live music etc.)

04 How many travellers are currently visiting my destination during the winter and shoulder season? (hotel occupancy trend by season)

05 What elements of my region or area do visitors know and understand and where are there gaps? (hidden gems, what's trending, hard to access assets etc.)

Notes:

Tip: 02

Find Your Partners

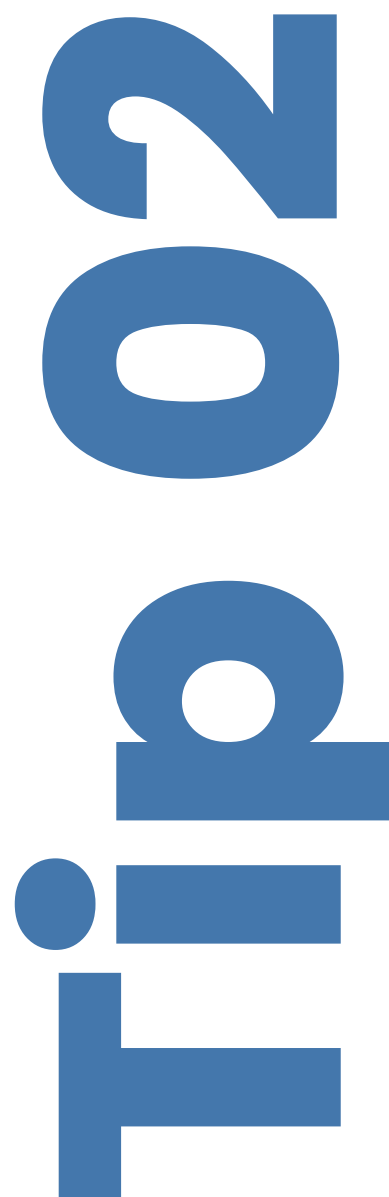
Your DMO can be a trusted partner and advocate. Connect and make them one of your key partners to access a wide range of services and opportunities. Keep in mind that you bring a lot to the table; there are benefits for both sides.

Here are some tips for working with your DMO:

- Let them know what you have to offer
- Know their role and priorities
- Share your voice and add to the conversation
- Stay connected through industry email lists, social media and other forums

Similar or complementary businesses can also provide great insights and be valuable contacts and partners. Here are some tips to discover new partnership opportunities:

- Do your research to join local business groups such as chambers of commerce, convention bureaus or other professional organizations.
- Ask other businesses in your community which groups they participate in or check out LinkedIn, Meetup, or Facebook for groups meeting near you.
- Join local tourism associations to meet and network. Buy an annual membership to stay connected.



Tip: 03

Choose The Right Type of Partnership

Working in partnership with others can be a rewarding experience. Partnerships can open new doors and generate various efficiencies. However, creating new relationships and maintaining them can be tricky enough, so it's best not to jump into a partnership on a whim.

The checklist below can help you determine whether a formal agreement or advice may be necessary:

- ☐ Change over time?
- ☐ Involve joint ownership of any assets?
- ☐ Require ongoing investment from you?
- ☐ Make a profit or incur a loss?
- ☐ Be involving direct competitors?
- ☐ Require you to share sensitive business information?

If you answered “yes” to any of these questions, you should seek legal advice before finalizing anything. This will likely involve drawing up some sort of partnership agreement that ensures clarity of responsibilities and liabilities.



Tip: 04

Create a Strategic Plan

If there's one takeaway from this pandemic, it's that strategic planning matters. So, do some thinking. Consider how you would adapt your campaigns, messaging, product or audience to meet winter and shoulder season needs. The following tools can help you start the brainstorming process so you have a better handle on your challenges and opportunities, vision, strategic objectives and more.

See [\(Winter and Shoulder Season Strategy: A 3-Phase Process\)](#) for more in-depth details on the strategic planning process, then adapt to your own needs!

4



Tip

Tool: 01

Strategic Planning Models – PESTLE Analysis

The PESTLE analysis framework is a strategic planning tool you can use to bolster your scenario analysis. With its holistic approach, accounting for a range of influential factors, it can be invaluable in both planning for and navigating your business. It stands for:

	Factor	Opportunity	Threat
Political			
Economic			
Social			
Technological			
Legal			
Environmental			

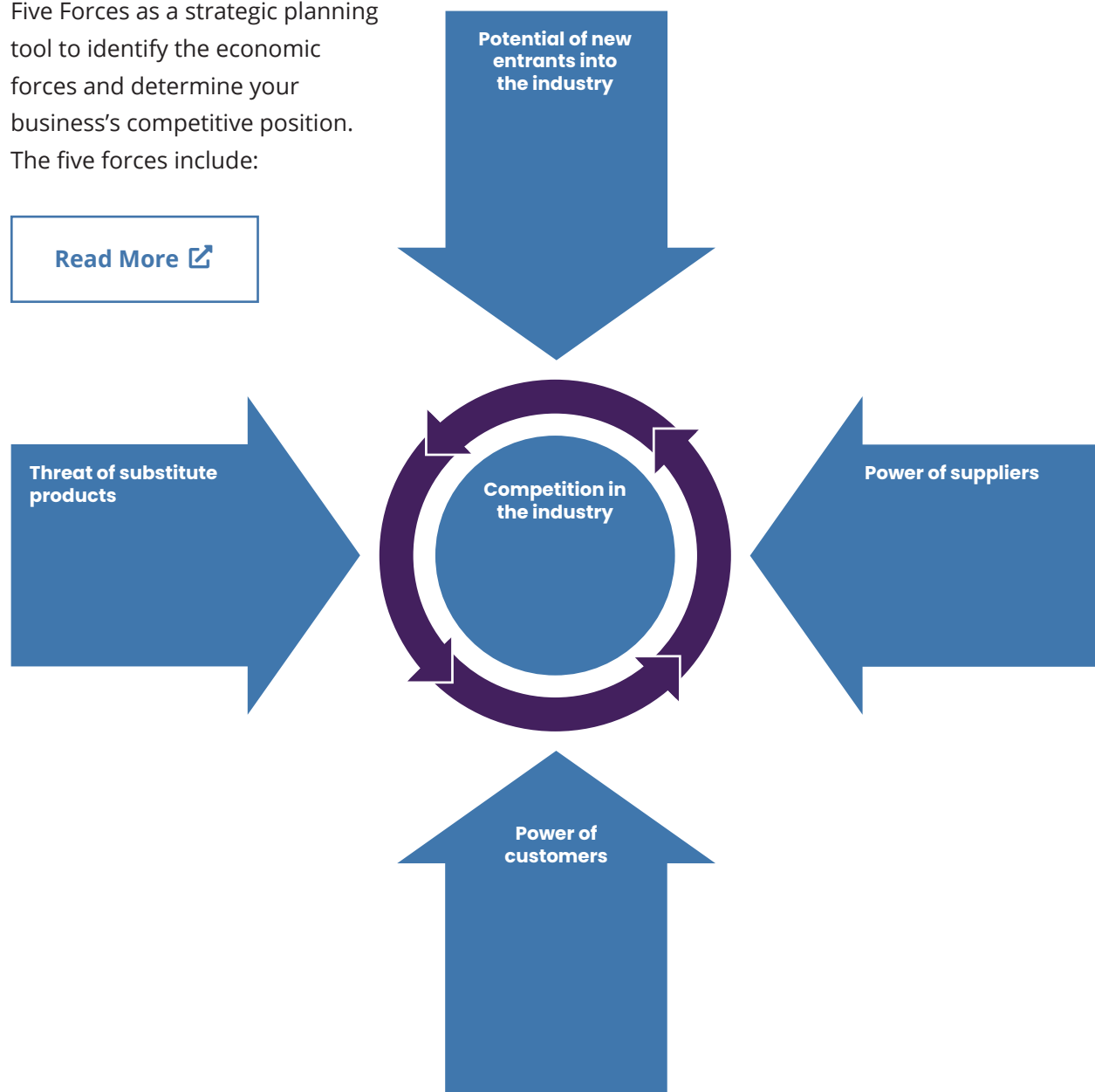
Each of these elements allows an organization to take stock of the business environment they're operating in, which helps develop a strategy for success.

[Read More](#) 

Tool: 02

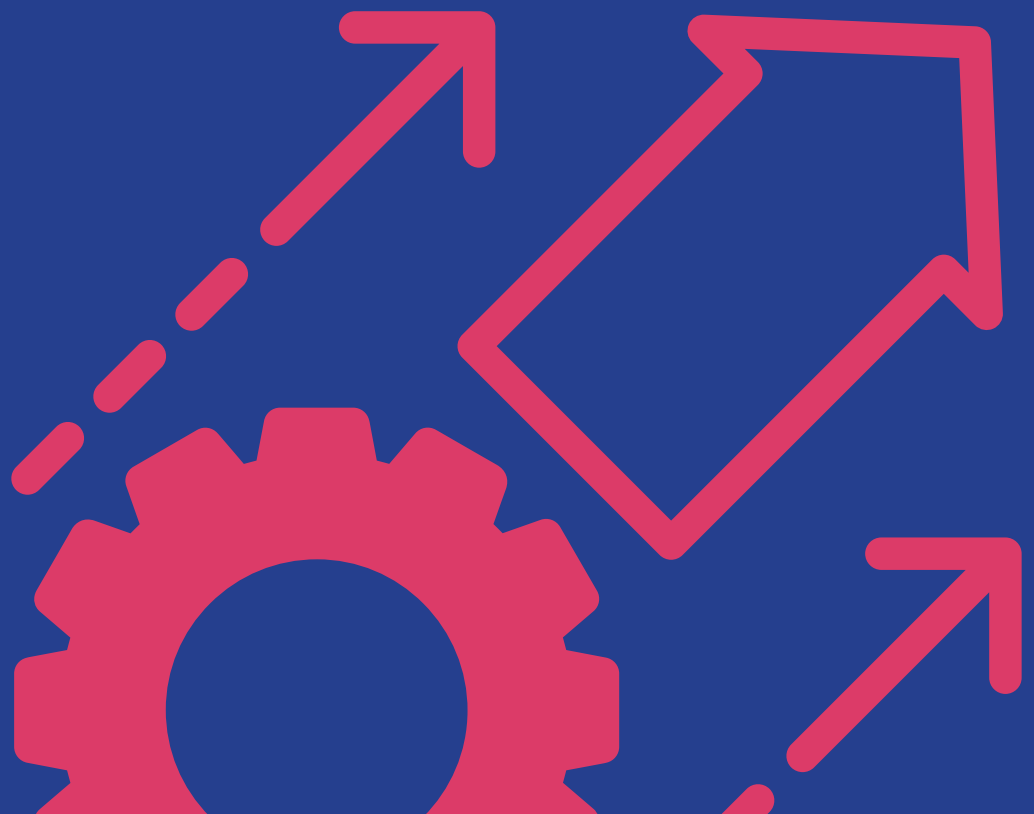
Strategic Planning Models – Porter's Five Forces

Additionally, you can use Porter's Five Forces as a strategic planning tool to identify the economic forces and determine your business's competitive position. The five forces include:

[Read More](#) 

Strive to Perform Better

Operational effectiveness is all about performing at your best. It's about delivering more value to customers, or comparable value at a lower cost, or both. Your business needs both operational efficiency and strategy to create a sustainable competitive advantage.



Tip: 05

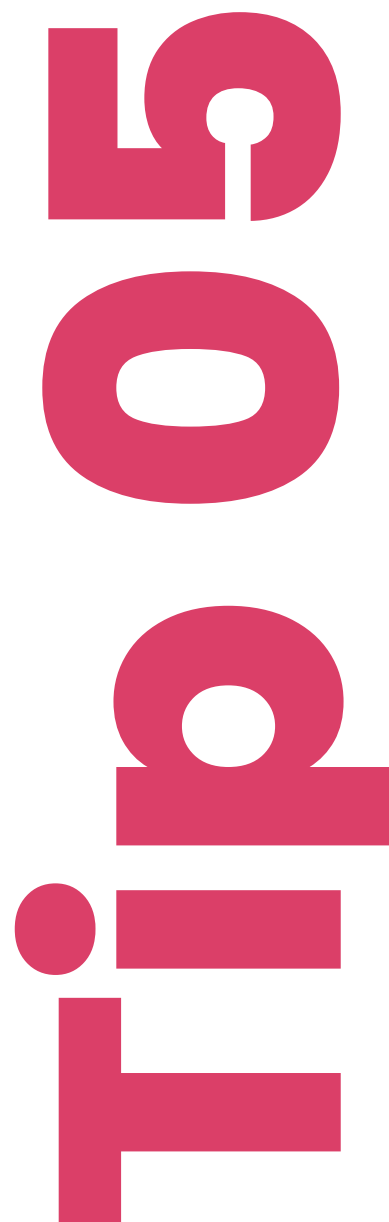
Create an Amazing Customer Service Experience

Great customer service is at the core of every successful tourism business. Research shows that 54% of all consumers say that they have higher customer service expectations than they did just one year ago.¹ In a competitive market, it's worth it to create a strategy that standardizes processes and ensures consistent and high quality experiences with every customer.

Top tips for creating a solid customer service strategy:

- Consider needs and expectations by market
- Include a service strategy at all customer touch points
- Monitor and evaluate service standards
- Collect customer feedback and act on it

Put yourself in the visitor's shoes. Are there ways you can make a winter or shoulder season travel experience more comfortable? Always ask yourself how a choice will improve the customer experience. For example, a first time visitor may have a lot more questions than a repeat. In this case, make it easier for them to find the information they need. Create blog posts, how-to guides or a Q&A list so people can help themselves.



Money Matters

Funding your business is one of the first—and most important—financial choices most business owners make. How you fund your business can affect how you run it, so take time to weigh your options.



Tip: 06

Secure Your Funding

Shifting your strategy to include winter and shoulder season operations may require new sources of funding. In addition to your usual sources, identify and review your options (such as grants, programs, business improvement areas, RDAs etc.) that are available to support development and/or enhancement of winter and shoulder season products and experiences. Connect with your tourism partners and stay up to date on new announcements. Finally, always ask questions early and get advice before filling out grant applications to ensure fit and eligibility.

GO
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F



Build Your Reputation and Hire Right

Human resource planning helps to ensure you have the right people with the right skills on your team to drive your business forward. Hiring in tourism can be tough; it's essential to plan ahead with a Human Resources Plan (HR Plan).

Your HR Plan must directly align with the strategy you set for your business. For example, a tour operator may have a goal to introduce backcountry winter walks, and will need to employ new workers that are trained for the elements, safety and varying guest experience levels. For each business goal and need, assess areas like staffing to ensure you have the capacity to deliver, training to prepare staff, and performance management to build talent.



Tip: 07

Conduct a Skills Inventory

A skills inventory is the collection of skills, education, and experiences of employees. By conducting one, you can gain a better understanding of your company's current skillset. Insights generated will help with delegation, job satisfaction, training programs, promotions, continuity, and deciding when to hire.

Start by identifying the skills and competencies that are important to your organization. Then have employees complete a self-assessment. Expect that you'll discover gaps, as well as skills that were previously unknown. And remember to keep your skills inventory current, so you have a real-time view of your workforce skills whenever you need it.

Tip



Tip: 08

Find Great Employees and Keep Them

Recruitment

The global nature of work and the increasing emphasis on lifelong learning means you don't have to hire the first person you interview. Take a good look at references and focus on finding a candidate who understands your business, mission, vision and has the spirit to serve.

Think outside the box when recruiting. Connect with universities/colleges with tourism and hospitality programs to have students placed with you for a year. Consider different candidate pools such as seniors looking for part-time year-round employment or create a strategic alliance with another operator to share staff.

Retention

An employee retention program can protect your business. When your top employees leave their knowledge, skills and experience go with them. That's why investing in employee training and retention is essential.



6 Proven Employee Retention Strategies



Offer competitive wages and salaries



Offer yearly bonuses to encourage loyalty



Outline clear pathways for career progression



Establish a mentorship program



Celebrate achievements



Create a comfortable atmosphere

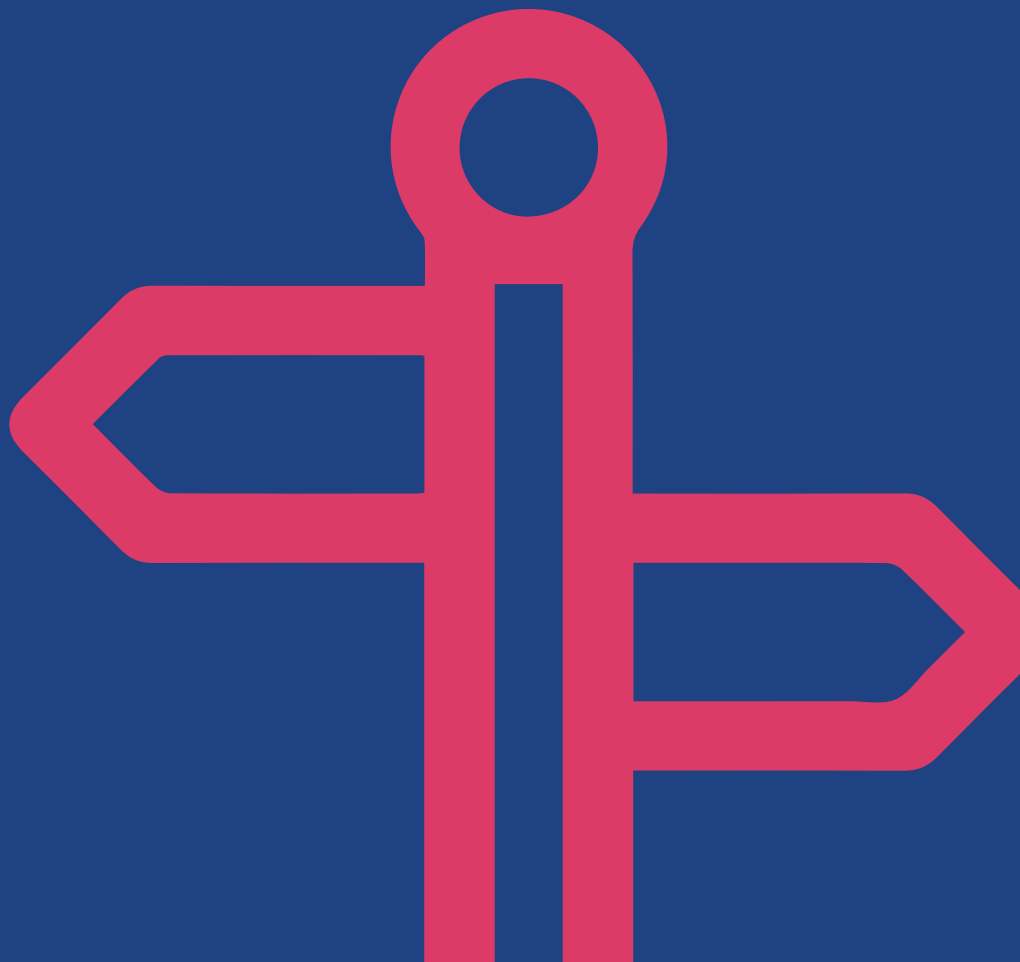
Tourism HR has a variety of valuable learning resources and training opportunities for tourism operators:

[Read More](#) 



A Bold New Direction

Knowing what type of products and services are in demand by domestic and international travellers will help you create compelling and interesting offerings.

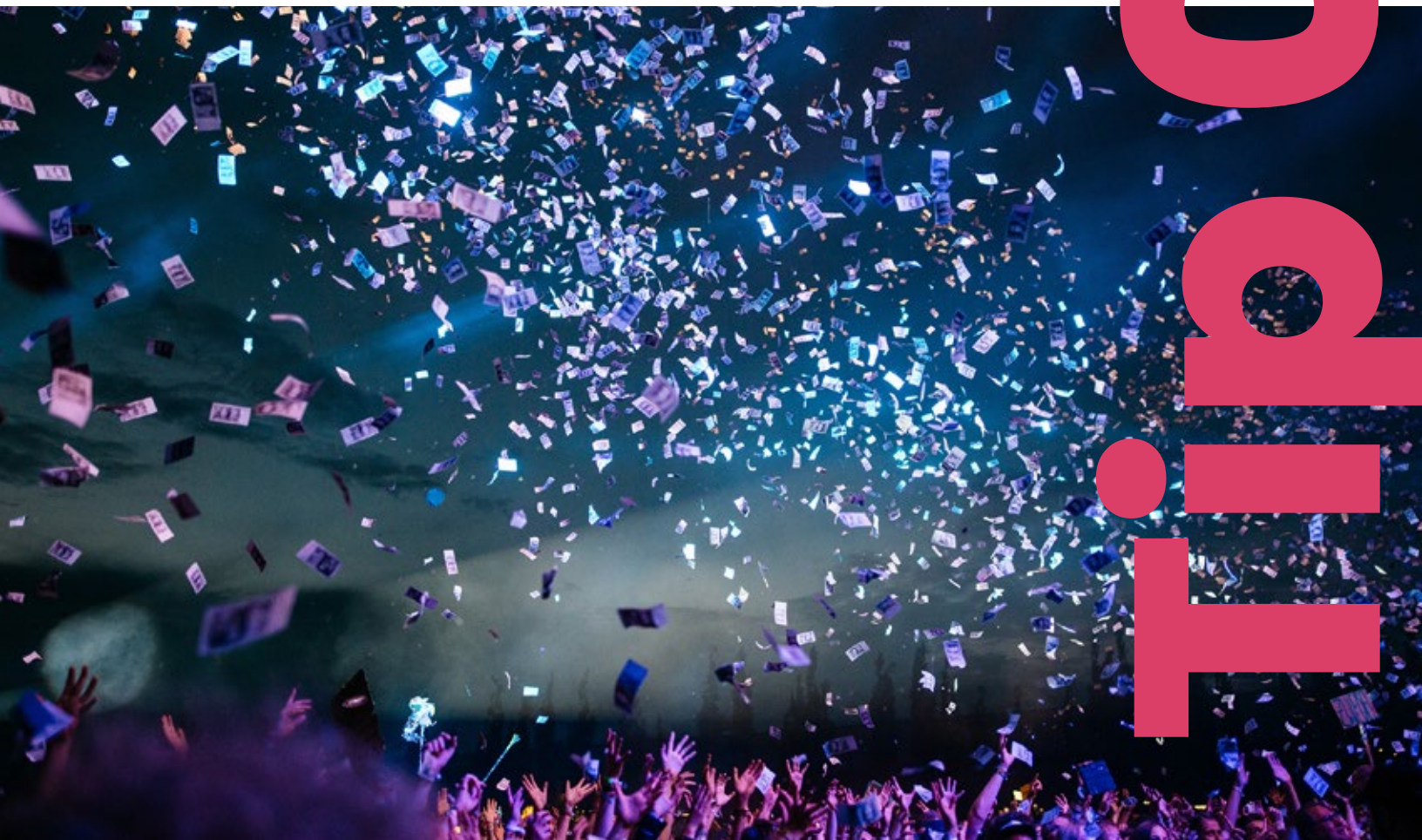


Tip: 09

Discover Your Big Idea (or Small Idea)

Great ideas often start out small. To offer quality products and experiences you need to understand the needs of different customers and strive to provide something that really matters to them. This rule applies to everything – from fall festivals to ice fishing trips, and retreats for corporate teams.

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Worksheet: 02

Creating Your Products and Experiences

Do you know where your current travellers are from? (local, regional, provincial etc.)

Have you defined your target market(s)? (market size, demand, length of stay, booking lead time, travel patterns etc.)

Do you know what is meaningful to them? (interests, hobbies, values etc.)

Have you chosen a specialization? (history, adventure, culinary, general touring etc.)

Do you have group offerings? (small groups of friends, corporate retreats, sports teams etc.)

Is your team proficient in multiple languages and aware of cultural nuances?
(alignment with target market)

Destination Canada's Explorer Quotient segments are a useful first step in determining what your product development priorities should be. The market segmentation tool provides data per segment, per country and provides insight into what motivates each group.

[Read More](#) 

Tip: 10

Make a Great Idea Better

In some cases a business has a great idea but needs to enhance it to create something bigger, leverage an existing spark or to align with an experience theme of the destination.



Tip

Worksheet: 03

Brainstorming Model – SCAMPER

The SCAMPER model is a handy technique that can help you generate new ideas and come up with solutions to difficult challenges. Maybe you're looking to substitute an existing product or service to make it better? Or perhaps improve a process or combine services to reduce costs to create winter offerings?

The first step is to think about which product or service you want to improve or are having challenges with. Then, ask questions about it by using each letter as noted below. The final step is to take a look at what you wrote and see what stands out as viable for further exploration.

SCAMPER stands for:

Substitute
Combine
Adapt
Modify
Put to another use
Eliminate
Reverse

	Product/service 1	Product/service 2	Product/service 3
Substitute			
Combine			
Adapt			
Modify			
Put to another use			
Eliminate			
Reverse			

Read More 

Tip: 11

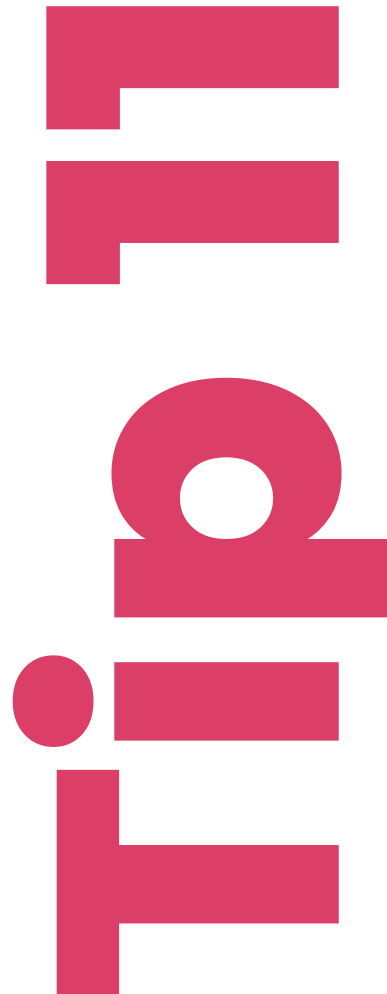
Create and Sell Itineraries & Packages

Being part of an itinerary or creating a package is a great way for travellers to learn more about your business and your destination. Packages are not a new idea, and all types of businesses create them. The rapid shift to online bookings has only made this process easier and more attractive for travellers.

Packages have evolved from traditional to experiential to meet the needs of travellers. Here's a breakdown on the differences:

What is a traditional package? Typically it is a group of products and services presented as a unit and sold for one fixed price. Products and services may include accommodation, transportation, experiences, and meals.

What is an experiential package? It focuses on creating encounters, interactions and moments to evoke emotions and leave travellers with lasting memories. The price of the package is based on the cost of the package components, plus a premium for the value travellers receive.

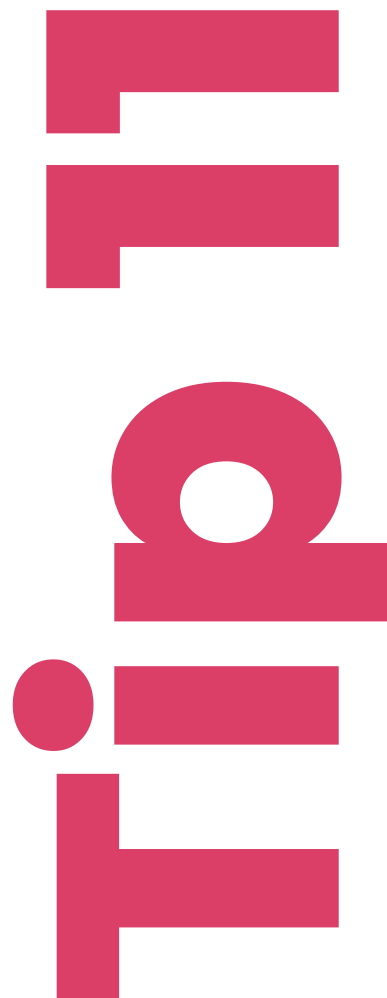


What Are Some of The Steps to Create a Package?²

- 01** Know your customers
- 02** Know your community and region
- 03** Think about the types of experiences that make sense for your business
- 04** Choose a theme or story
- 05** Plan the experience
- 06** Establish the flow with the itinerary
- 07** Select partners, suppliers and experience providers
- 08** Think about market positioning

HOW TO TAKE ACTION Work through Destination Canada's Signature Experiences Toolkit, available here:

[Read More](#) 



Being Ready and Accessible

Generally speaking, tourists expect facilities in their chosen destination to be comparable to what they enjoy at home. Unless you're promoting a rustic, 'return to nature' experience, having solid infrastructure that stands up during winter and shoulder season is a key part of your offering.



Tip: 12

Get Your Facilities Ready For Any Weather

From a guest perspective, managing expectations around what to pack to stay comfortable and in cold or rainy weather is obviously helpful. But when it comes to your business, proactively preparing any essential infrastructure can help reduce the risk of downtime, lost productivity, and damaged equipment.

01

Maintain Your Heating System

Schedule heating check-ups. Ask your maintenance team to check for problems with airlocks, leakage, and thermostat control.

02

Prepare for Power Outages

While power outages may be unexpected, you can still take steps in advance to minimize their potential impact on your business. Keep flashlights and batteries on hand and consider whether you need a backup power source.

03

Set Up a Communications Plan

Create a plan for situations like severe weather. Define roles for your team and decide on the best communication tools in advance.



Tip: 13

Simplify Winter and Shoulder Travel

Unreliable or nonexistent winter transportation and maintenance is a common challenge for rural operators. But don't let this stop you. Advocate for your business by bringing your challenges (and solutions) to decision-makers in your community. Are there any 'quick wins' that could improve things?

44% of Canadian travellers cite poor weather as a barrier for winter and shoulder season travel.³ Help them overcome this by offering your top travel tips. Tell them which roads to take, how long the drive will be, and what time it starts getting dark, as well as where to stop if conditions get bad.

Collaboration Tip

Partner with a shuttle service so you can safely bring visitors to you. Get other local hotels and operators involved to share services and reduce costs.

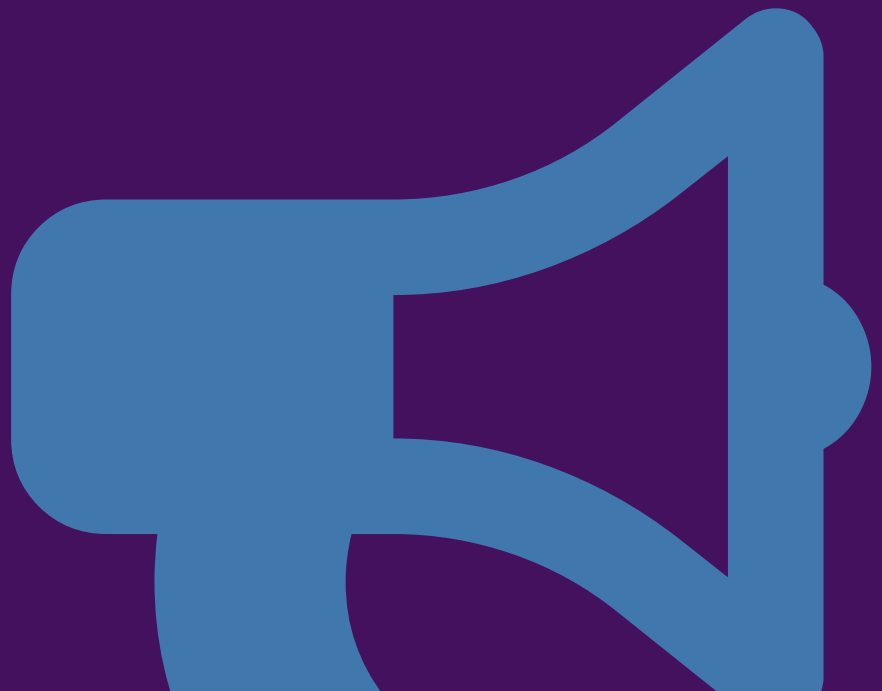
Collaboration Tip

If a lack of winter gear is a barrier for potential visitors, offer it on your site or link to other recommended vendors. By cross-promoting with another retailer, you may even tap into a whole new market!



Choosing Your Markets

Creating your product and marketing is often the fun part of starting or expanding a tourism business. To do it well, you need a solid understanding of the markets you want to enter and in-depth knowledge about your ideal traveller. Everything from their age, income, geographic proximity, lifestyle choices, online preferences and hobbies will help to inform your strategy and plans.



Tip: 14

Find Your Ideal Traveller

Market Research

Through your research you can validate your assumptions, further define the characteristics of the target markets, quantify the size of a market and support the development and refinement of your product, experience or event to reflect demands.

Geographic Markets

You should include a mix of local, provincial, regional, domestic, and international markets based on your objectives. Consider things like size of the market, spend, length of stay, access and the strength of DMO and PTO relationships with the travel trade.

Communities of Interest

In a competitive marketplace, businesses can take the route of focussing on the interests of small, passionate traveller segments. Head to [Winter and Shoulder Season Strategy: A 3-Phase Process](#) to find out how Hamilton, Missouri became a quilter's paradise.

The Elevating Canadian Experiences website is a resource for winter and shoulder season tourism research that you can use to assess profiles and characteristics. Please check out the website for more information.

[Read More](#) 

Reaching Potential Travelers

When it comes to marketing your business, you may not know where to start. Distribution channels are the means by which potential customers find out about your products and services – they are a vital way to promote your business and drive sales.

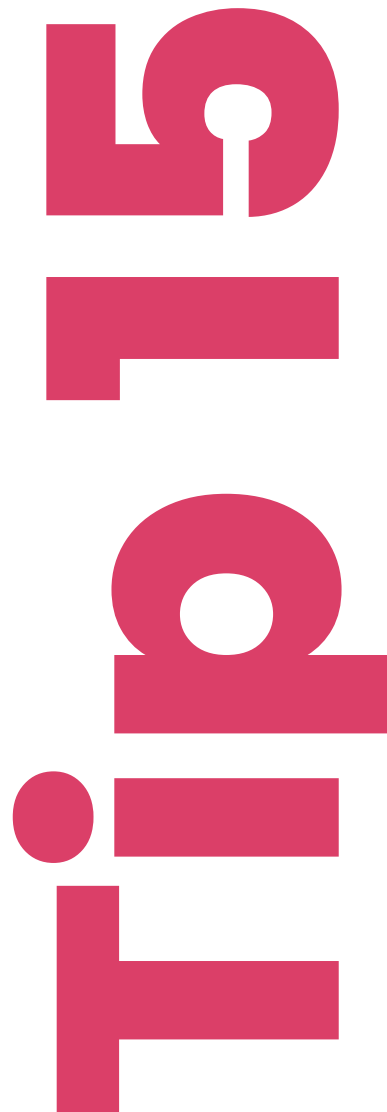


Tip: 15

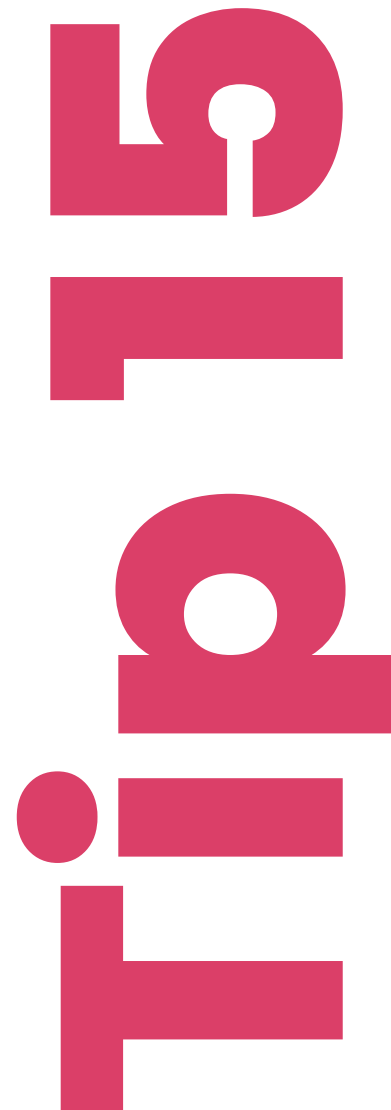
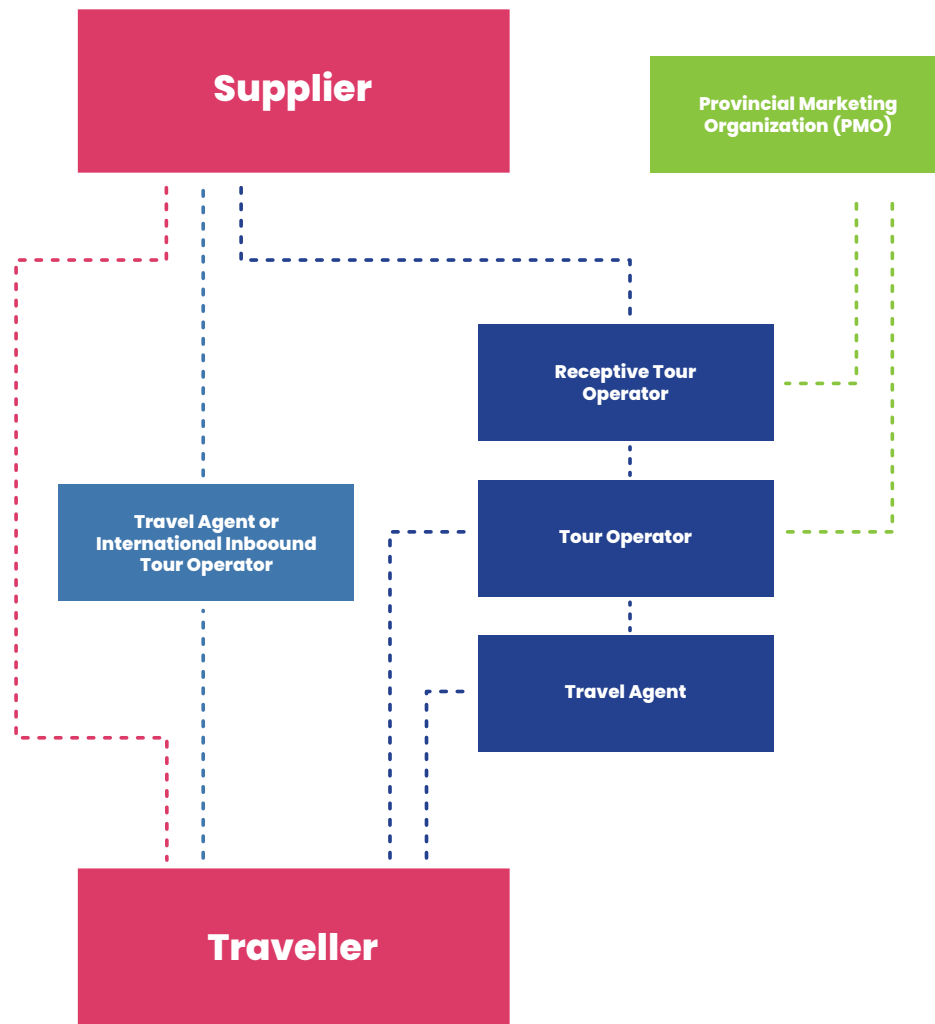
Understand The Travel Trade⁴

As your business grows and you become export ready, the travel trade will become your key distribution partners. Put simply, travel trade is the network of businesses that forms the international travel distribution system – the buyers and sellers who sell both to consumers and other buyers within the network.

Export Ready - Refers to a business that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, agrees to trade bookings and a cancellation policy.



The graphic below shows where the travel trade sits when it comes to the relationship between tourism operators/suppliers and travellers.



In order to be travel trade and export ready, you need to prepare yourself in a number of areas:

Rates

You need to have considered net rates and commissions when setting prices for travel trade partners.

Supply and Inventory

You need to determine if you have enough supply to work with travel trade before pursuing them.

Booking Systems and Policies

A flexible, online and automated booking system is very useful when working with both travel trade and consumers. You will need to develop booking policies to cover expectations for rates, taxes, allocations, arrival and departure times etc.

Year-round Support

International travel trade partners sell year-round and need you to be available to support their efforts.

Response Times

An industry benchmark is to respond to any inquiry, whether from travel trade or a consumer, within 24 hours. Be sure to provide a dedicated email and phone number that is monitored regularly, 365 days a year.

Service and Experience level Expectations

As travel trade are an educated and well-travelled audience, they expect consistently high product and service levels.

Much more information on working with travel trade is available in this document, produced by the Atlantic Canada Opportunities Agency, various DMOs across Atlantic Canada and Twenty31 Consulting.

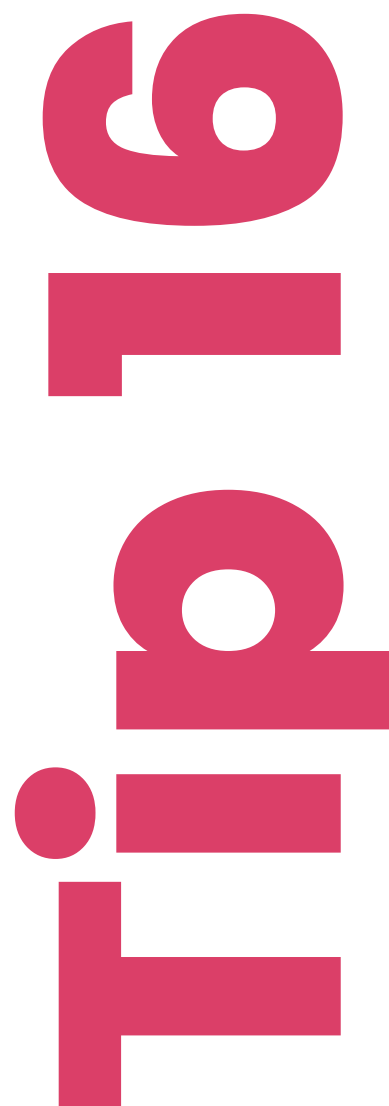
Much more information on working with travel trade is available in [this document](#), produced by the Atlantic Canada Opportunities Agency, various DMOs across Atlantic Canada and Twenty31 Consulting.

Tip: 16

Work With Online Travel Agencies⁵

Online Travel Agencies (OTAs) will play a critical role in the revitalization of small business revenues globally. If you've been skeptical about working with an OTA, here are some facts to consider:

- Understanding OTAs current market share - Over 60% of global small business bookings are made via OTAs, and two-thirds of all OTA bookings globally are with small, privately owned hotels.
- Marketing budgets and reach – With far greater purchasing power, mass customer base reach, and high-tech promotional tools like personalization and hyper-specific consumer targeting, OTAs' sophisticated marketing support can deliver beyond what typical small business can deliver on their own.
- Powerful data and insight perks - OTAs have constant access to the most immediate travel and tourism data and trends, which small businesses typically do not have the same access to (but can via OTA partners).
- Access to new market sources – By working with OTAs, small businesses can gain greater exposure beyond local markets, enable multi-lingual marketing efforts, and move into new international markets more rapidly using their vast global audiences.

[Read More](#) 

Be Clever With Your Marketing

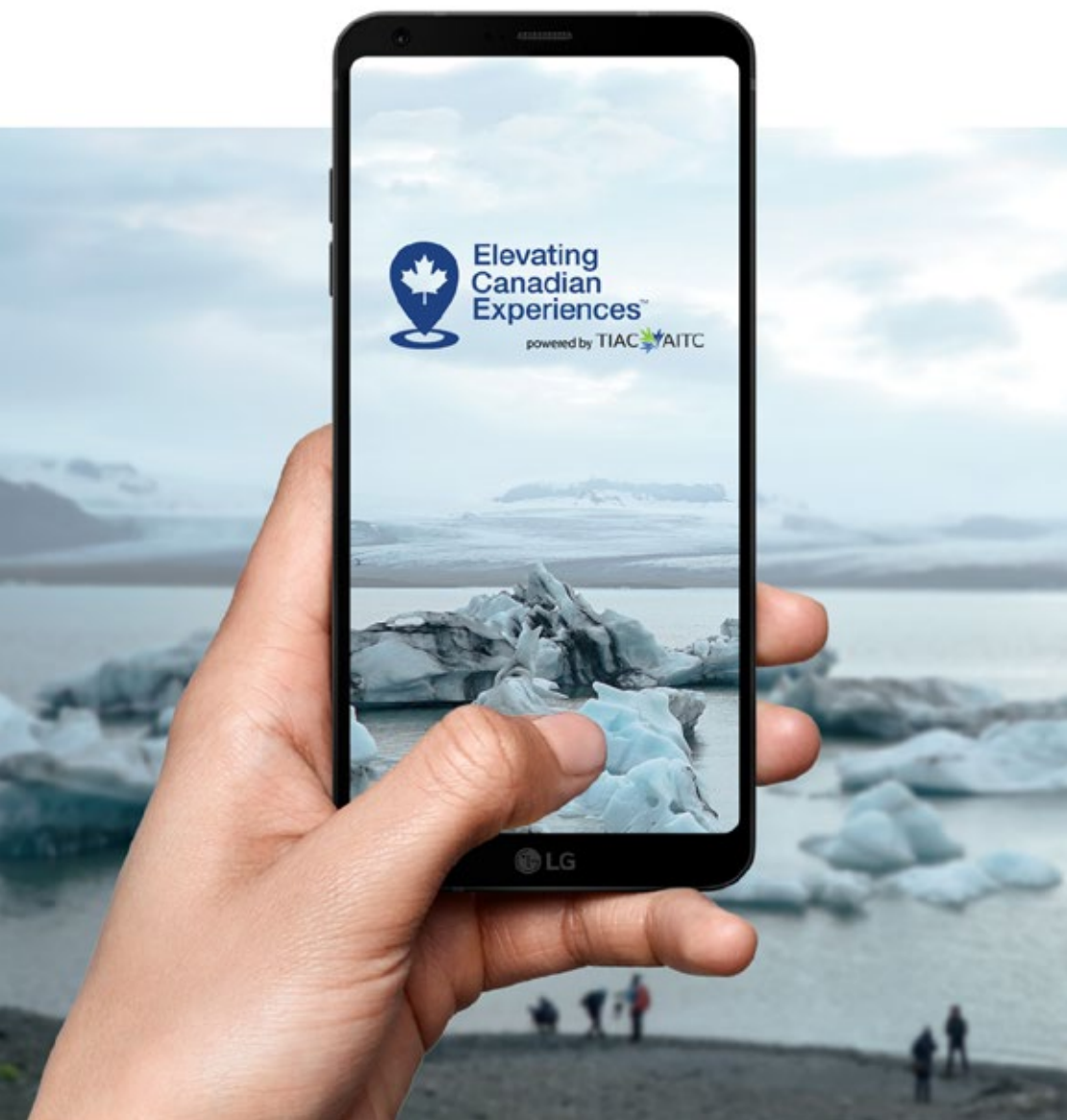
Digital technology has empowered us all, providing instant access to information and simplifying how we research our travel decisions. As an operator, you have more opportunities than ever to market your tourism business.



Tip: 17

Get Your Branding Right

A brand is the way a business positions itself in the marketplace– at a basic level, it is the name or symbol used to identify products or services, but it is also the ‘story’ it tells to differentiate itself from the competition. In this business climate, a strong brand acts as a promise of quality and consistency.



Tip

Tip: 18

Experiment With Your Pricing

To successfully manage your business year-round you need to learn how to price. There are a variety of pricing strategies and tactics specifically for the winter and shoulder season:

Approach

How

Create different pricing categories.

Set pricing based on the high, low and shoulder season, as well as the additional events and seasons you identify.

Play on the days of the week.

Try offering deals on Thursdays or Sundays to encourage visitors to extend a weekend getaway.

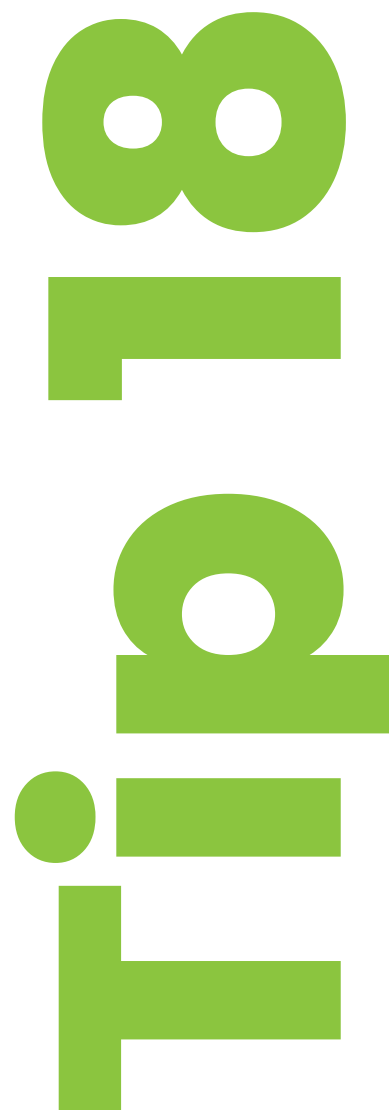
Create value-add pricing options.

Provide a locally sourced artisanal food basket on arrival if you're a hotel, offer a gourmet lunch basket for tours, or add tickets to a live theatre performance in town.

Use pre-sales to build excitement.

Create a countdown timer leading up to the launch of a fall experience, a workshop, or a festival in your community.

IDEA - Check out competitor pricing in your community and other destinations.



Tip: 19

Create Buzz for Your Business and Destination

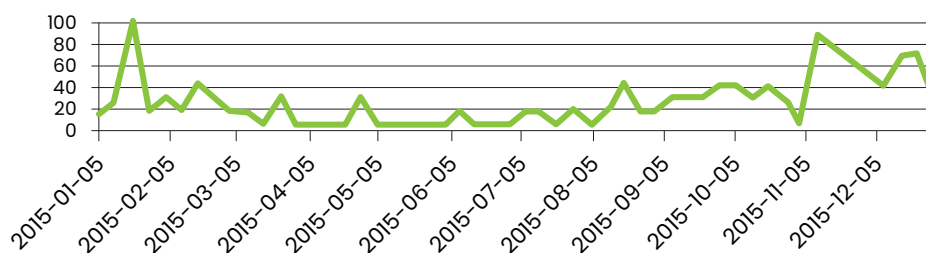
Want to get people talking about your business?
Here are a few ways to help make that happen:

Promote The Season With Your Website

Make it evident you're open year-round by using your website's homepage to highlight your seasonal branding. Whether you're selling scenic fall hikes or a winter wonderland spa retreat, you should start promoting the season at least 6-8 weeks in advance.

Google Search Trends can help you plan. For example, we explored Canadian search interest for the term 'winter trip' in 2019 and found a periodic interest throughout the year but the first week of August is when online research really picks up.

Figure 13: Interest over time "Winter Trip" in Canada (2019)



Source: Google Search Trends

Check out Google Search Trends for more information.

[Read More](#) 



Build Your Email Database All Year

Statistics show that 73% of millennials prefer communications from businesses to come via email. Email can be used to gather intelligence and communicate many different things such as seasonal discounts, updates, and promotions.

Some simple ways to build your email database include:

- Talk directly to your audience.
- Add signup forms and prompts to your website and social media accounts.
- Run contests and other engaging campaigns to add subscribers.
- Invite people to subscribe at events.

Use Images to Inspire

Start investing in high-quality images that capture the coziness of a Canadian winter. Just be careful to avoid setting unrealistic expectations. Feature natural scenes that inspire feelings of warmth rather than endless sunny skies. Have a variety of images for each season ready, and be sure to leverage user-generated content. Don't forget to check your DMO and PTO image libraries too!



Create a Seasonal Content Marketing Strategy

Travellers are looking for inspiration and planning their next trip throughout the year. A content marketing strategy will help you with all the details behind creation and keep your audience engaged.

Consider the following:

- Create a content calendar to plan out topics and schedules for the full year.
- Address the barriers you know about (e.g., weather not as good, attractions limited, no festivals/events, work commitments).
- Highlight benefits (e.g., lack of crowds, cheaper prices, friendlier people, fall colours, skiing).
- Share and re-share content across channels, especially during the high season to generate interest.
- Align content with your ideal traveller needs, interests, values etc.

Collaboration Tip

Work with your community to boost each other up across your collective channels and audiences.

How to Take Action

Use ready to go templates to create your own content marketing plan > <https://blog.hubspot.com/marketing/content-marketing-plan>



Leverage Events

If your destination has festivals and events, tournaments or business conferences, you have a huge opportunity to leverage increased demand. Even if your business is not directly involved or the event is happening in a nearby destination, there are ways to use it to your advantage.

Here are some ideas:

- Create a package that relates to the event.
- Buy a booth at the event or sponsor it.
- Promote the event on your social accounts and by email.
- Start a Google Adwords campaign to reach potential customers.

Spread the Word

Remember, tourism is all about people, so word of mouth referrals are often one of your most effective marketing strategies. Be sure to tell current visitors about what's happening in the winter and shoulder season. Then give them an incentive to write a review. Can you provide a discount if they bring along friends and family? Or offer a free service in return?



Tip: 20

Establish Strong Media Relationships

As in most industries, relationships in media are everything. Whether you distribute a media release to local or regional media when you have something new to announce. Or host a lunch with local media to establish relationships with industry professionals. These are both examples of ways you can start building yours.

Consumer vs Travel Trade Media⁶

All media falls into two main categories: trade and consumer. Travel trade media focuses on the industry and particular professions within it. Consumer media targets the general public.

All consumer and travel trade editors, reporters and influencers look for answers to the following questions:

Who is presenting the story?

What is the story?

Where is the story/ experience located?

When should travellers visit?

Why is this travel experience or destination relevant now?

How do travellers book and how do they get there?

Check out Destination Canada's Media Relations Toolkit for more in-depth information.

[Read More](#) 



Case Study

Storm Watching in Tofino

Overview

Tofino, located on the western coast of Vancouver Island in British Columbia, is a small village of 1,875 residents. It sits on traditional territory of the Tla-o-qui-aht First Nation within the Clayoquot Sound UNESCO Biosphere Region. It has long been a popular travel destination for surfing and other water sports during the warm summer months.

Between October and early March (formerly thought of as their 'bad season'), the area is too cold for those visitors, and it sees highly turbulent weather passing through.

Approach

With an average of 10-15 powerful storms taking place each year, Tofino successfully stimulated their winter and shoulder season tourism by building a brand around these natural spectacles. The events are particularly thrilling for 'storm-chasing' tourists, as they move in from across the Pacific with no landmasses to disrupt their force until they reach the shore.

Results

Today, Tofino village sees about 1 million visitors annually. The local hotel and accommodation businesses have greatly benefitted from this push, especially those with coastal views, as storm watching is mainly an indoor activity and thus creates an audience for them to engage with.

Case Study

Churchill Managing Accessibility and Authenticity

Overview

Churchill is a remote town on Hudson Bay, in the far north of Manitoba, which is only accessible by air or by rail. With potential visitors being so reliant on just two methods of travel, maintaining tourism can be challenging. For example, in 2017, a severe 57-hour blizzard caused so much damage to the railway that the community was isolated for 18 months.

Approach

Churchill's main visitor draw is their wintry northern lights and local wildlife. In the summer, tourists arrive to water paddle and view the hundreds of resident belugas. Later in fall, their famous polar bear population appears. An estimated 10,000 people per year visit the brief 5-6 week long 'bear season,' which is sometimes referred to as an example of 'last chance tourism.'

When the 2017 railway breakdown occurred, a group of local First Nations and industry leaders aligned together as the Arctic Gateway Group to purchase the damaged track along with the town's port. Later in 2018, the railway path to Churchill was able to reopen, and a funding plan was also announced to support further renovations for the port.

Results

Each year, 530,000 people travel to Northern Manitoba, generating over \$115,000 million in revenue, according to Travel Manitoba. While the renovations no doubt have enabled tourism success, some local owners continue to worry the increased access to Churchill poses potential risks to the town's very identity and its authenticity as a destination.

Supporting Winter and Shoulder Season Tourism Learning Checklist

- ☐ Understand what is required to succeed in the winter and shoulder season.
- ☐ Start planning details around your strategy development process.
- ☐ Connect with your DMO and other operators in your community.

¹Nextiva. "100 Essential Customer Service Statistics and Trends for 2021"

²Destination Canada. "Experiences: a toolkit for partners of the Canadian Tourism Commission (2nd edition)"

³Twenty 31/Elevating Canadian Experiences. "Growing Canada's Shoulders"

⁴Atlantic Canada Opportunities Agency. "Atlantic Canada Travel Trade Toolkit"

⁵PATA. "The Role of Online Travel Agencies in Supporting Asia Pacific SMEs in Recovery"

⁶Destination Canada. "Destination Canada International Media Toolkit"

Other Resources:

Travel Manitoba. "Polar Bear Capital of the World, Churchill"

Global News. "Oil pipeline to Port of Churchill a possibility: Manitoba premier"

Lonely Planet. "Churchill Travel"

The Guardian. "If it gets me, it gets me': the town where residents live alongside polar bears"

Norden. "Arctic tourism in times of change: Seasonality"

Saturday Evening Post. "Storm-chasing on Vancouver Island"

Tourism Tofino. "Storm Watching"

The Star. "Storm watching in Tofino"

RoadTrippers.com. "Perfect storm: In the winter, Tofino's rugged coastline puts on a wild and magnificent show"

Final Checklist and Resources

Review the comprehensive action checklist from this toolkit.

The Current Landscape: Adjusting to a New Reality

- ☐ Understand the impacts of COVID-19 on the global economy.
- ☐ Recognize the ways the travel and tourism industry has been impacted and future opportunities.
- ☐ Stay up to date on the state of recovery and shifting market expectations.

Seasonality: Problem or Opportunity?

- ☐ Understand your destination's seasonality and the estimated timeframe for each season.
- ☐ Learn about the factors that cause seasonality in your destination.
- ☐ Assess your mindset around the potential for winter and shoulder season tourism in your destination.

The Situation in Canada: Trends, Insights & Analysis

- ☐ Understand the impacts of seasonality on tourism performance across Canada.
- ☐ Recognize the benefits of diversifying beyond domestic tourism markets.
- ☐ Examine which activities are key motivators for travel in the summer high season in your destinations.

Winter and Shoulder Season Strategy: A 3-Phase Process for Destinations

- ☐ Make a commitment and build your team for strategy development.
- ☐ Collect your background documents; gather statistics and other relevant information.
- ☐ Start identifying stakeholders for participation.

Supporting Winter and Shoulder Season Tourism: Tips for Operators

- ☐ Understand what is required to succeed in the winter and shoulder season.
- ☐ Start planning details around your strategy development process.
- ☐ Connect with your DMO and other operators in your community.

Terms to Know

Build your vocabulary of commonly used terms and acronyms.

Glossary

Demand: A market segment for which there is potentially unmet demand.

Destination: A place defined by the market as a unique location of a size capable of attracting visitors.

Destination Marketing Organization: Destination marketing/management organizations that work with Provincial and Territorial Tourism Industry Associations, tourism operators, travel trade, associations, regional tourism organizations, legislators and government to collaboratively promote tourism growth.

Drivers: Resources or a capability where the destination or the operator may hold a competitive advantage.

Tourism Expenditure (Spending): The amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips.

Export Ready: Refers to a business that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, agrees to trade bookings and a cancellation policy.

High Season: Depending on location, high season can occur during winter or summer. The months of June to August are considered the traditional high season in the Northern Hemisphere.

Length of stay: Number of nights spent in one destination.

Low Season: The low season is dominant from November to March in the Northern Hemisphere. It peaks in January and begins to transition to shoulder season in April and May.

Market Ready: Refers to a business that markets to potential visitors, that communicates with potential visitors year-round, and is ready to accept advanced reservations.

Occupancy Rate: The percentage of the total number of guestrooms, which are occupied by guests on any given date.

Online Travel Agency (OTA): A travel website that is dedicated to travel, the site may be focused on travel reviews, the booking of travel or the combination of both.

Operator: The producer of a unit of travel merchandise, such as a carrier, hotel or sightseeing service. Also includes a company that provides local travel services, including transportation or guide services.

Seasonality: A temporal imbalance in the phenomenon of tourism, which may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment, and admissions to attractions.

Shoulder Season: Shoulder season is used to describe the period between high season and low season. In Canada, there are generally two shoulder seasons: the main shoulder season, which falls between September and November and the second shoulder season, typically in April and May.

Supply: The current products or experiences that may appeal to prospective visitors.

Lead Opportunities: The “BIG IDEA” or the “BIG OPPORTUNITY” where a destination may have a competitive advantage.

Provincial and Territorial Tourism Industry Associations (PTTIA): Provincial and Territorial Tourism Industry Associations represent tourism interests and promote and support policies, programs and activities that benefit the industry’s growth and development.

Provincial and Territorial Tourism Marketing Organization (PTO): Provincial marketing organizations work with tourism suppliers, travel trade, operators, associations, regional tourism organizations, legislators and government to collaboratively promote tourism growth within the province.

Supporting Opportunities: The conditions for success and resources to develop the lead driver opportunity.

Tourist: A visitor (domestic, inbound, or outbound) is classified as a tourist (or overnight visitor), if they stay at least one night (but less than a year), for any main purpose (business, leisure, or other personal purpose) other than to be employed by a resident entity in the country or place visited.

Travel Trade: The collection of companies, which buy and sell travel. This includes receptives, international inbound tour operators and travel agents.

Unique Selling Point: The benefits differentiating your product and service from your competitors.

Winter Season: The winter season is the coldest time of the year, between autumn and spring. In the Northern Hemisphere, it is typically from December to March. In the Southern Hemisphere, it's the opposite.

Acronyms

DMO: Destination Marketing Organization

OTA: Online Travel Agency

PTTIA: Provincial and Territorial Tourism Industry Associations

PTO: Provincial and Territorial Tourism Marketing Organization

RDA: Regional Development Agency

UNWTO: United Nations World Tourism Organization