

40 min to complete

Enhancing Winter & Shoulder Season Tourism in Canada

Six-Module Learning Series

Webinar

Elevating Canadian Experiences: Agenda

03:40 to complete

Module One: Introduction to Elevating Canadian Experiences

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

Elevating Canadian Experiences: Agenda

07:45 to complete

Module Two: Seasonality in Tourism

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

Elevating Canadian Experiences: Agenda

05:15 to complete

Module Three: Canada's Challenges with Seasonality

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

03

Elevating Canadian Experiences: Agenda

04:15 to complete

Module Four: Shoulder Season Tourism

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

Elevating Canadian Experiences: Agenda

10:00 to complete

Module Five: Strategic Planning

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

05

Elevating Canadian Experiences: Agenda

06:45 to complete

Module Six: Case Studies & Key Takeaways

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



Module One:

Introduction to Elevating Canadian Experiences

Elevating Canadian Experiences: Goals

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

Elevating Canadian Experiences: Goals



**Identify communities
with high potential**



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

Elevating Canadian Experiences: Six-Step Approach



Elevating Canadian Experiences: Tourism During A Crisis

Key Considerations:

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

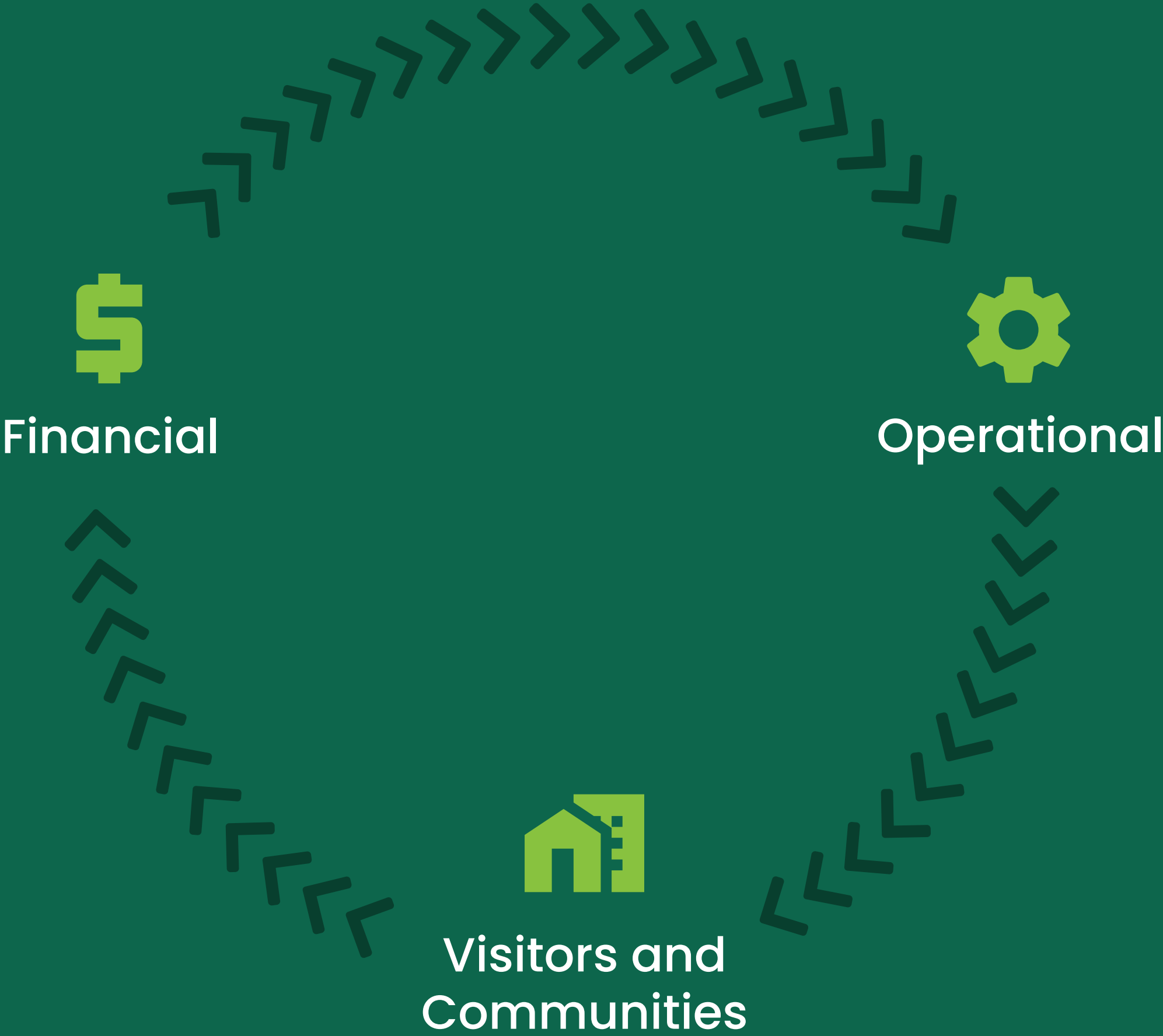


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Module Two:

Seasonality in Tourism

Seasonality in Tourism: Global Challenges



Financial:

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



Seasonality in Tourism: Global Challenges

Operational:

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

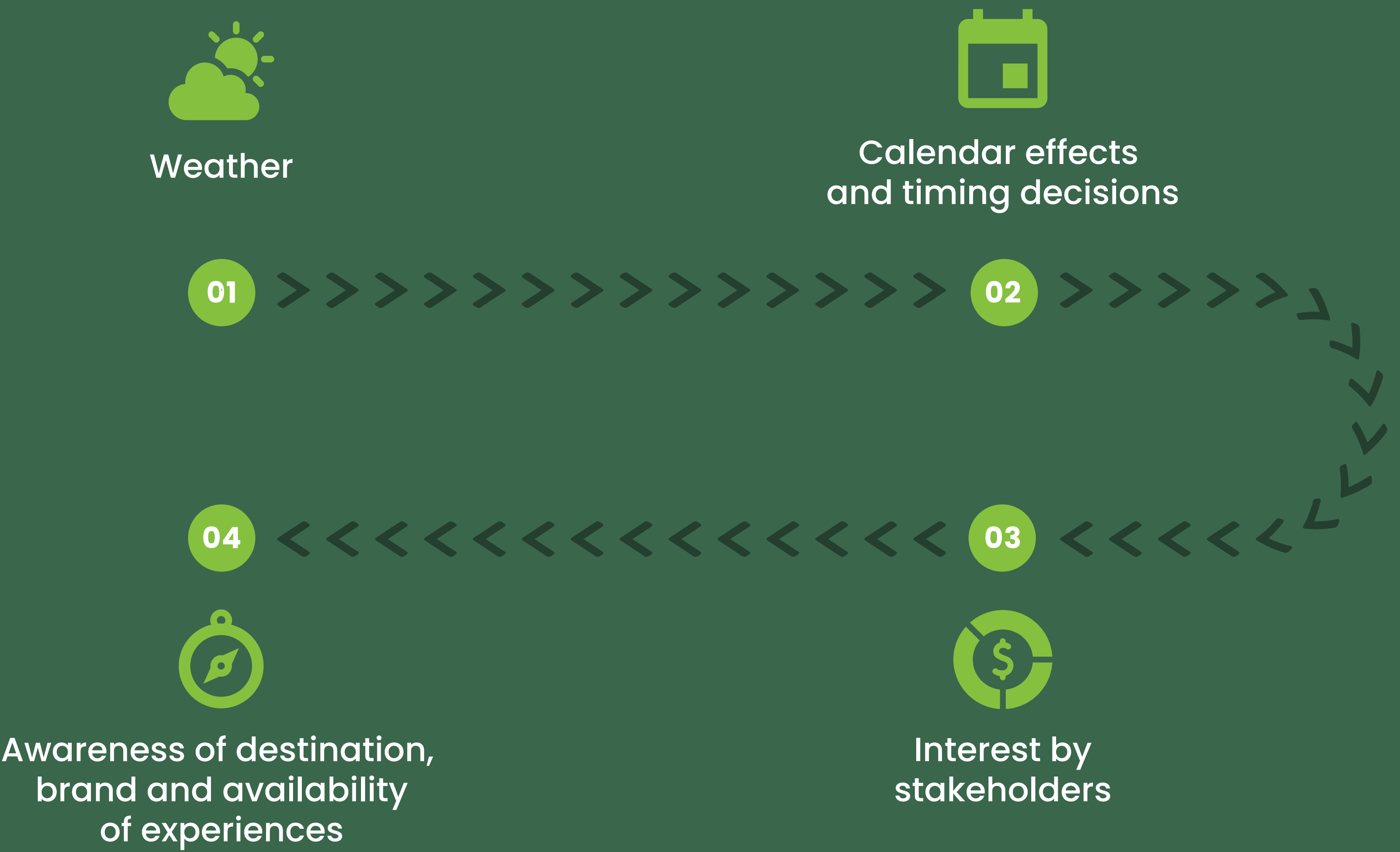


Visitors and Communities:

- Social carrying capacity
- Overcrowding in sensitive areas



Seasonality in Tourism: Causes of Seasonality



Seasonality in Tourism: Causes of Seasonality

Weather

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



Calendar effects and timing decisions

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



Interest by stakeholders

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



Seasonality in Tourism: Causes of Seasonality

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

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



Seasonality in Tourism: Four Factors Impacting Your Business

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



03

Module Three:

Canada's Challenges with Seasonality

Challenges with Seasonality: Canada's Challenges

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

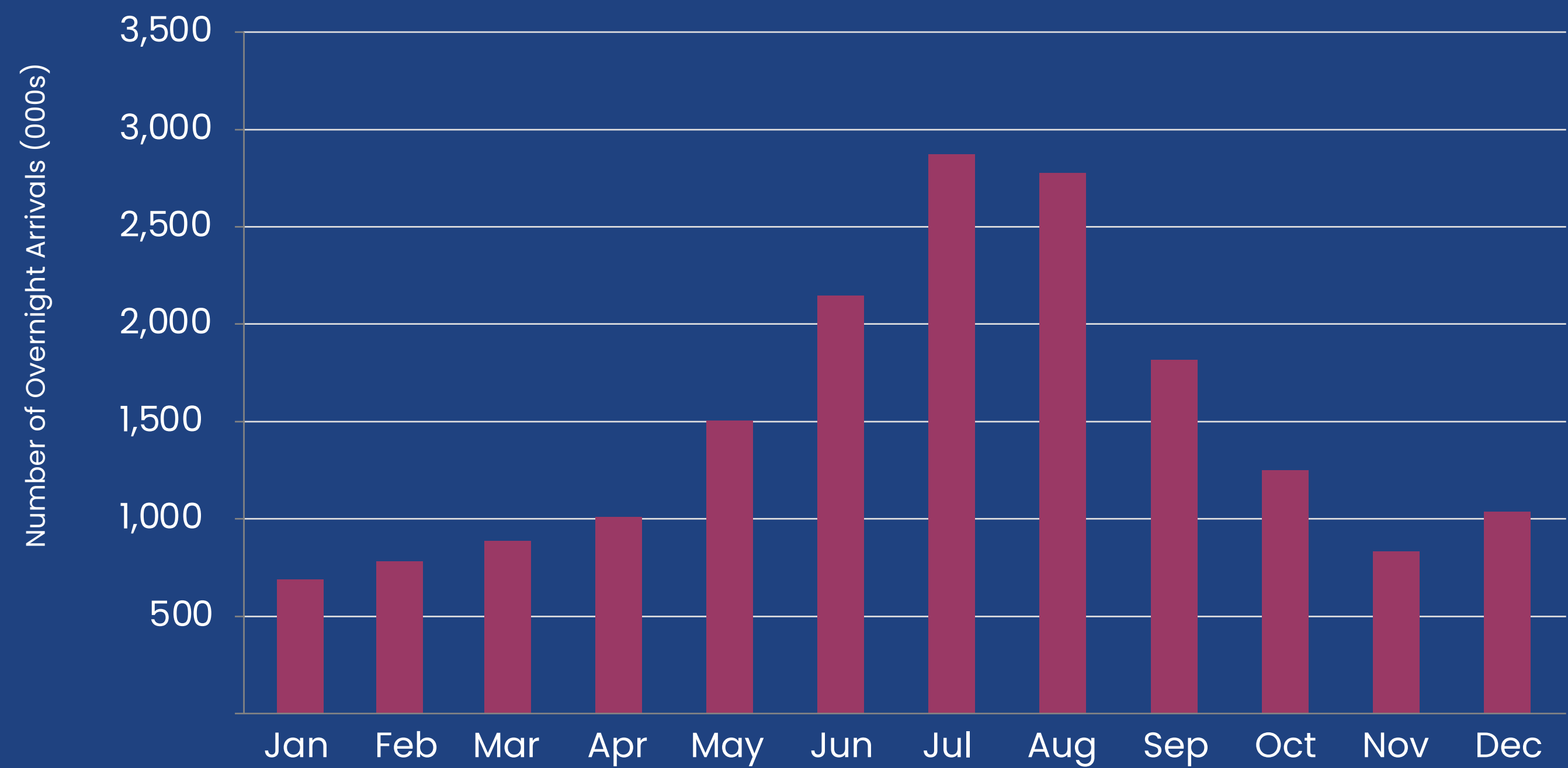


There is pent-up demand for travel, but consumer behaviour has drastically changed.

Challenges with Seasonality: Canada's Bell Curve

Seasonality In Canada

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



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

Challenges with Seasonality: Shoulder Season Factors

Motivators:

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

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

Challenges with Seasonality: Shoulder Season Factors

Barriers:

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



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

Challenges with Seasonality: Shoulder Season Factors

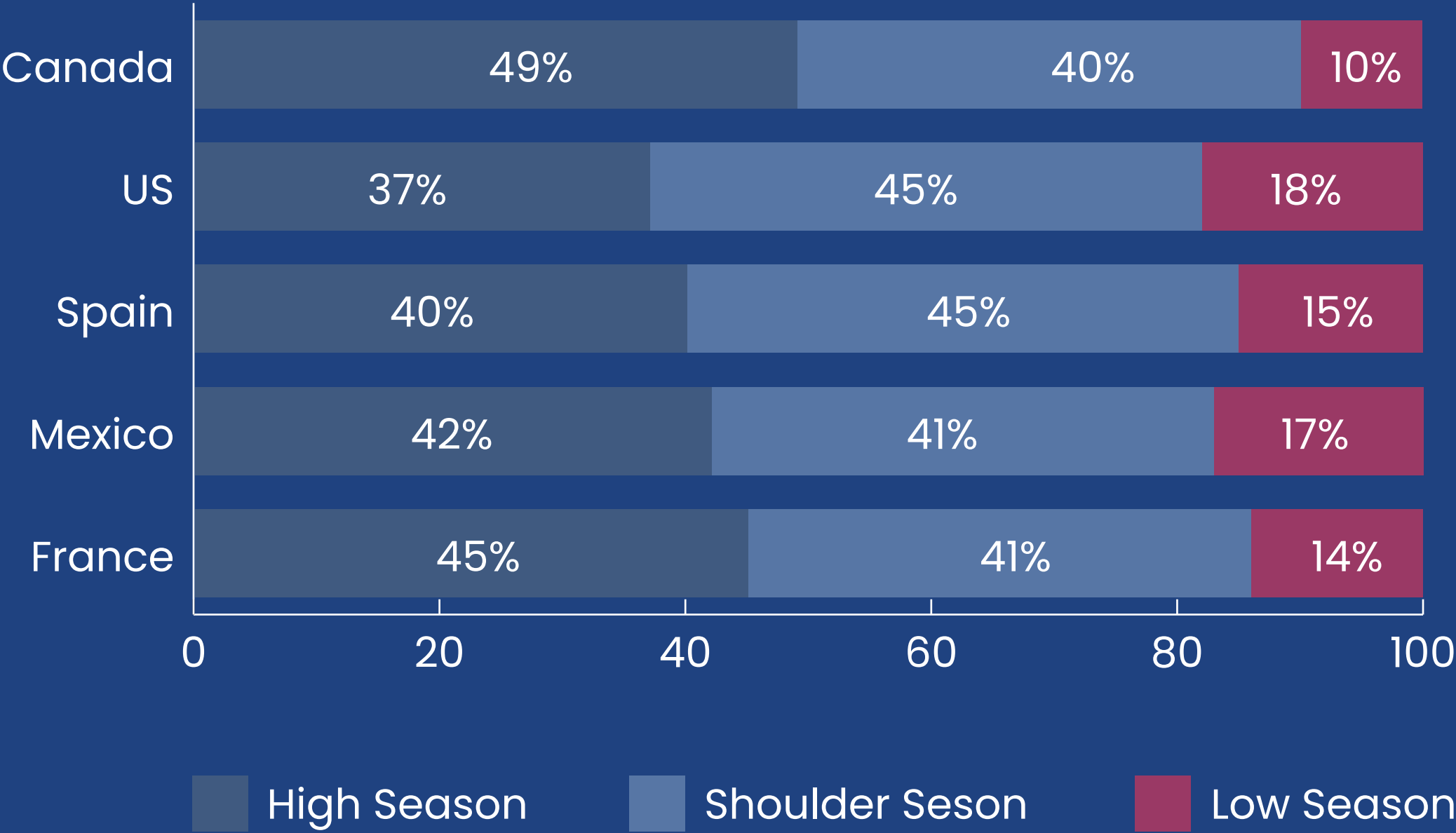
Activities:

- Sightseeing
- Outdoor adventure
- Culinary experiences

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

Challenges with Seasonality: A Peak Season Destination

Canada: A High Season (Summer) Destination



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

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Module Four:

Winter and Shoulder Season Tourism

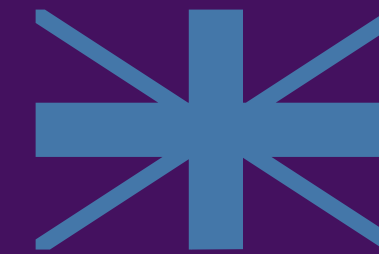
Winter and Shoulder Season Tourism: Why Choose Canada?



Canadians

47%

Motivated by cheaper accommodations



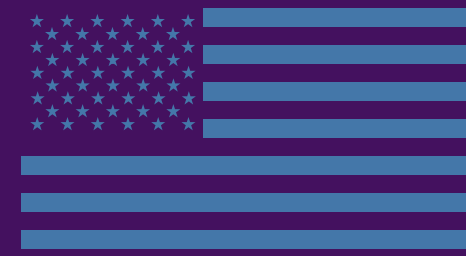
Britons

53%

Motivated by less expensive flights

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

Winter and Shoulder Season Tourism: Why Choose Canada?



Americans

16%

Motivated by
friendlier people

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

Winter and Shoulder Season Tourism: Canada's Barriers?

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

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

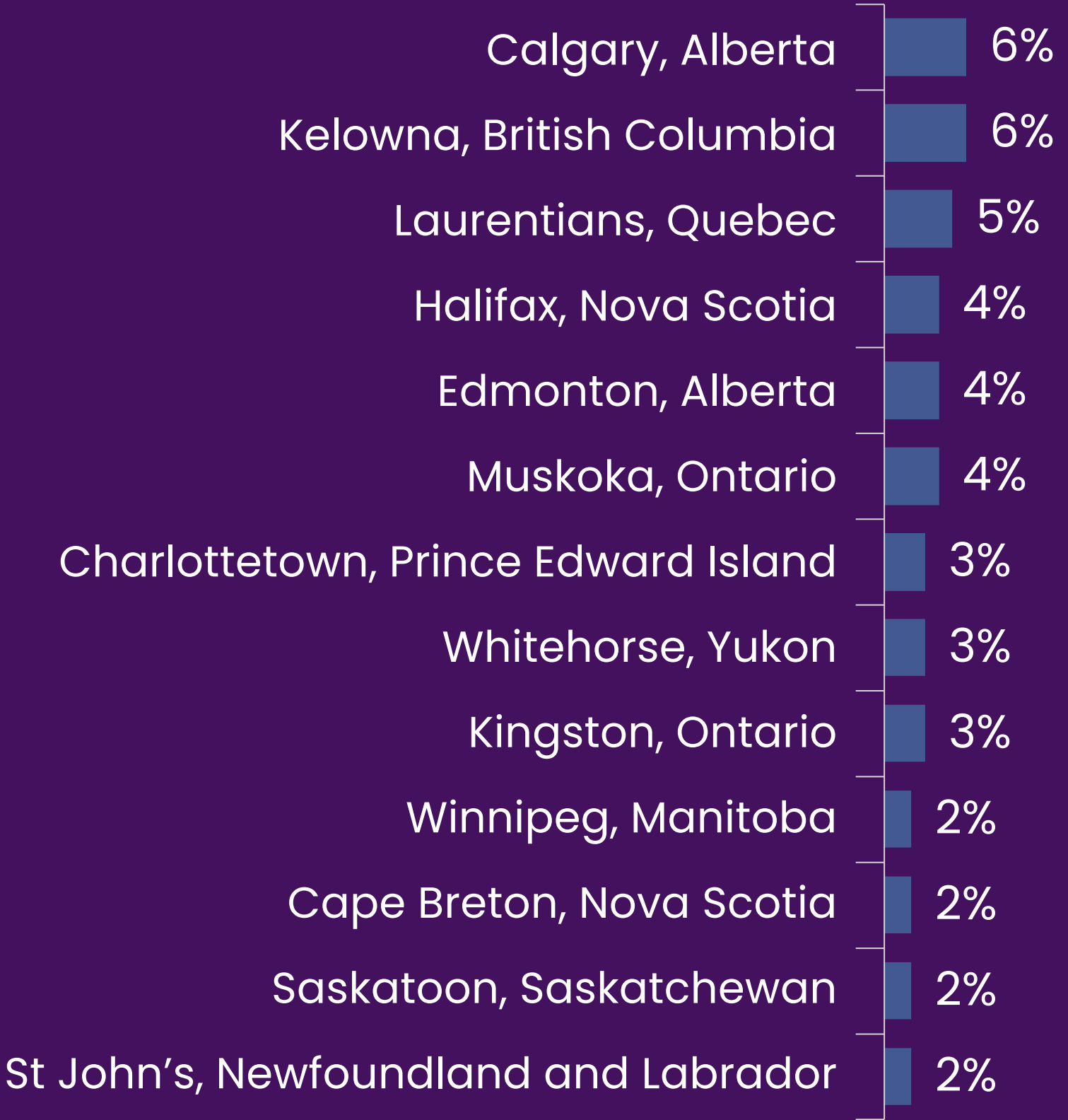
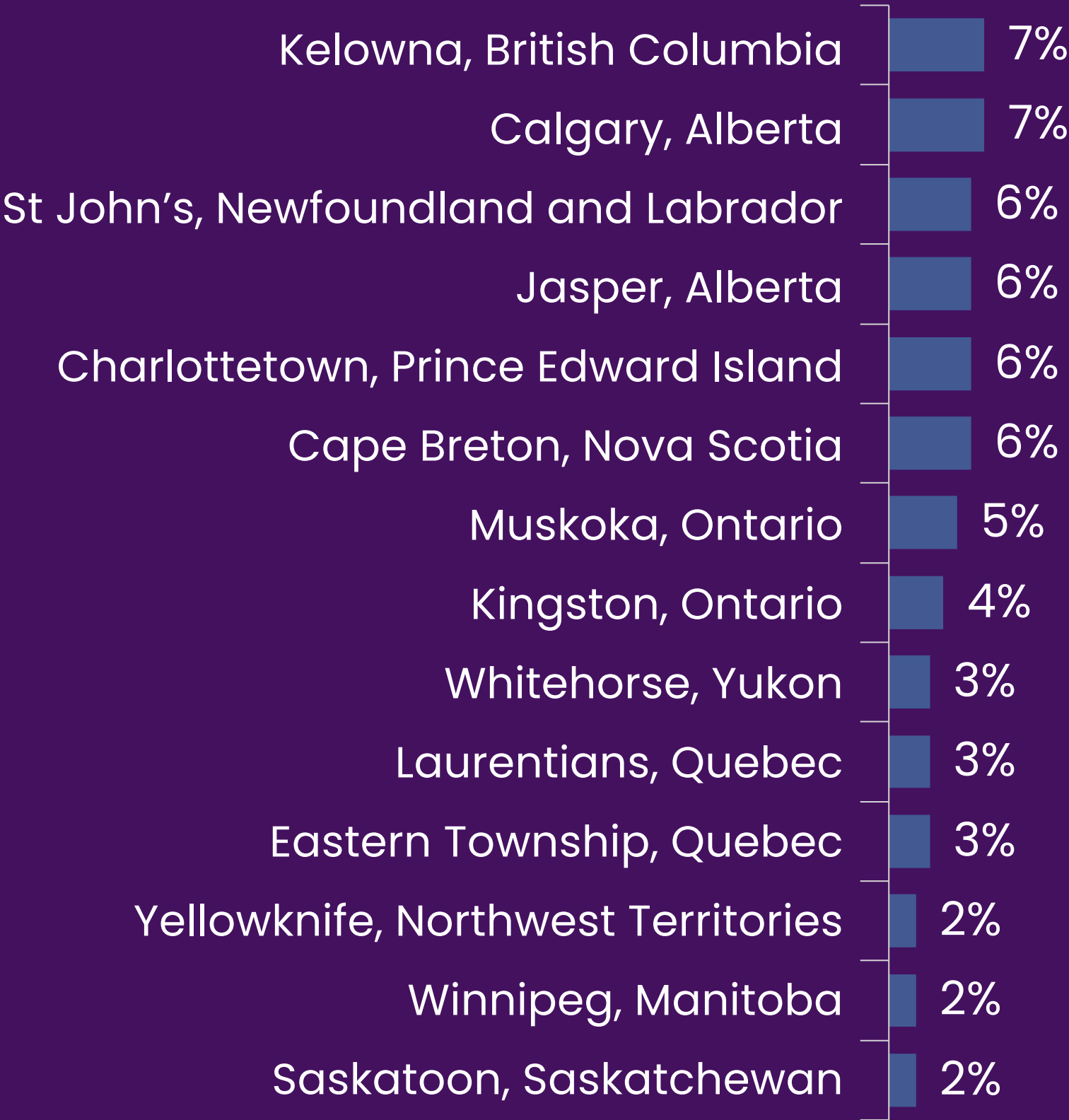
Winter and Shoulder Season Tourism: Popular Canadian Destinations

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

% interested to visit during...

Shoulder Season

Winter Season



Winter and Shoulder Season Tourism: Popular Canadian Destinations

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

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

Winter and Shoulder Season Tourism: Popular Canadian Activities



Sightseeing

Most popular among
Canadians, Americans
and Britons.

Culinary

Particularly popular
with Canadians and
Americans.

Winter and Shoulder Season Tourism: Popular Canadian Activities

National Parks

Popular among
American and British
consumers.

Wildlife

Particularly popular
among Britons during the
shoulder season.



Winter and Shoulder Season Tourism: Reflection Questions

01

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

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

Winter and Shoulder Season Tourism: Reflection Questions

02

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

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

Winter and Shoulder Season Tourism: Reflection Questions

03

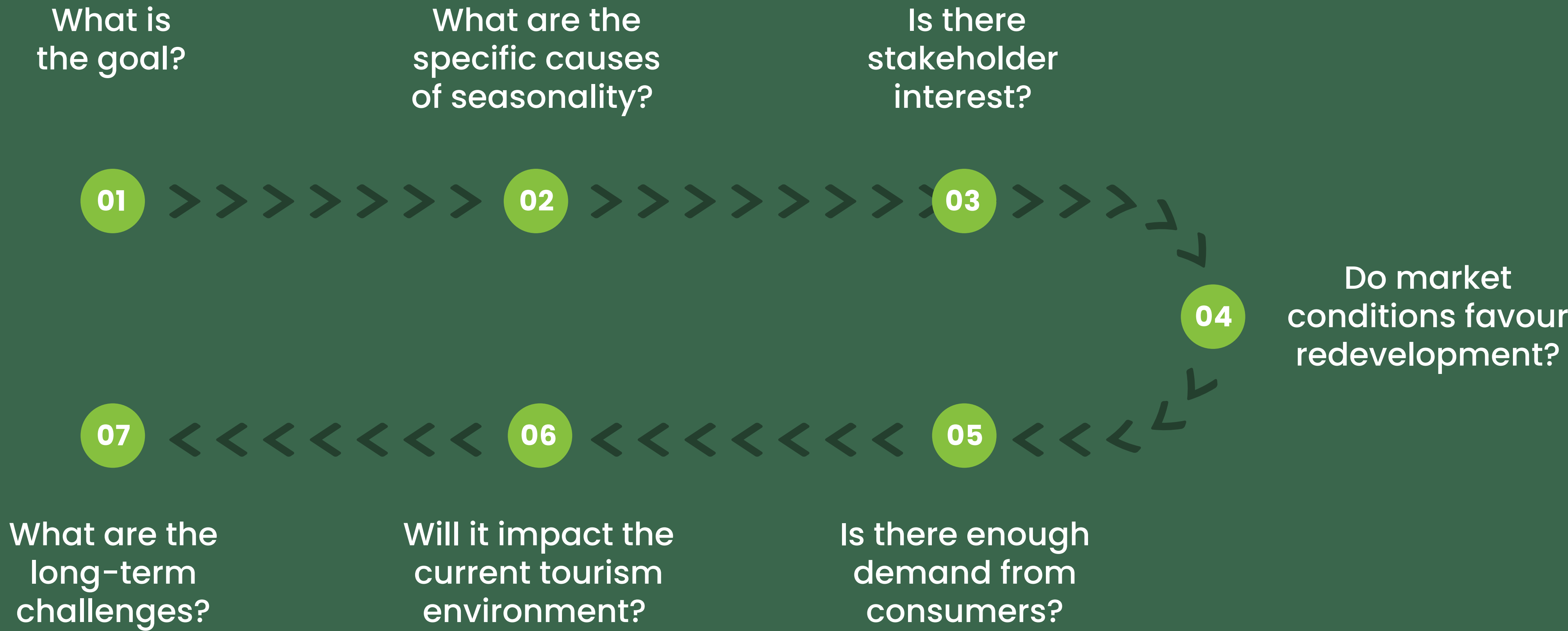
What are the top challenges for winter and shoulder tourism in your region?

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

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Module Five:
Strategic Planning

Strategic Planning: Seasonality Questions



Strategic Planning: Seasonality Questions



What is the goal?

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

***Limit overcrowded
marquee destinations?***

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

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

Strategic Planning: Seasonality Questions

What are the specific causes of seasonality in your destination?



Climate



Marketing



Perceptions



Availability

Strategic Planning: Seasonality Questions

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

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

Strategic Planning: Seasonality Questions

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

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

Strategic Planning: Seasonality Questions

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



Environmental



Communal



Financial

Strategic Planning: Seasonality Questions

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

Strategic Planning: Six Ideas to Boost Seasonal Tourism

1

Extend the Season

Reduce prices before and after the peak season.

2

Create New

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

Strategic Planning: Six Ideas to Boost Seasonal Tourism

3

Revamp Destination

Attract new audiences
by changing image
and facilities.

4

Rebrand as Unique or Prestigious

Position some experiences as
being exclusive or rare.

Strategic Planning: Six Ideas to Boost Seasonal Tourism

5

Develop a Second Peak Season

Add a strong winter season to a high summer season.

6

Add Non-Conventional Tourist Attractions

Develop unique experiences within your destinations.

Strategic Planning: Matching Consumer Needs

Pricing & Packaging:

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

Diversifying Destination & Product:

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

Strategic Planning: Matching Consumer Needs

Market Diversification:

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

Destination Facilitation:

- Align marketing campaigns with destination branding and positioning

Structural & Environmental:

- Develop programs and structures to facilitate off-season visitation

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Module Six:

Case Studies & Key Takeaways

Case Studies: Lapland, Finland

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

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



Case Studies: Lapland, Finland

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

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



Case Studies: Iceland

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

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



Common challenges facing seasonal tourism:

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



Key Takeaways: Opportunities & Actions

Strategy:

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



Product & Experience Development:

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



Customer Service:

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



Key Takeaways: Opportunities & Actions

Marketing:

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



Key Takeaways: Opportunities & Actions

Leadership:

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



Thank you

