DEVELOPING WINTER AND SHOULDER SEASON TOURISM EXPERIENCE OPPORTUNITIES

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with support from ETSI-BC

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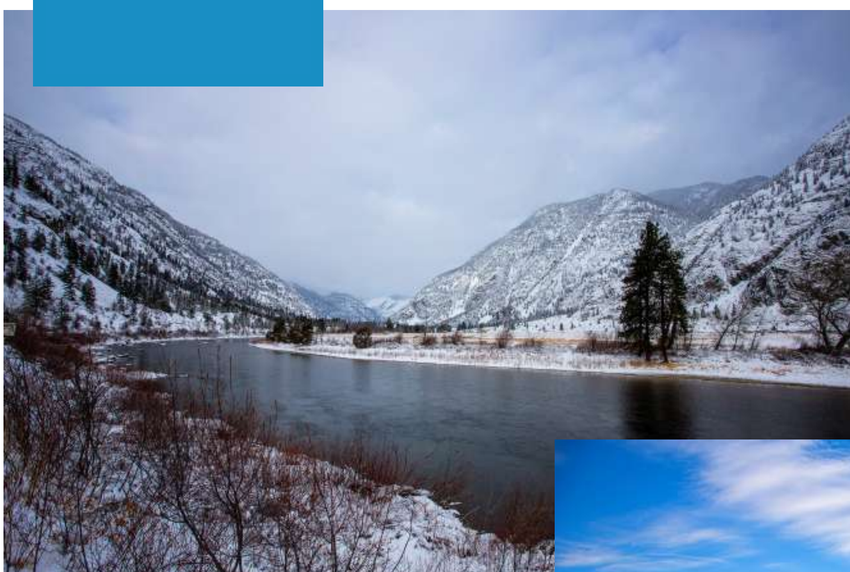

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1 Executive Summary

As the tourism industry recovers from the impacts of the world pandemic from COVID-19 - businesses, communities and visitor destinations are re-thinking tourism. In addition, climate events have been escalating in BC, and around the world in the past decade and impacts are being felt throughout our communities.

Relevant to this project, the tourism industry in BC has been seasonal for many communities, typically peak season is the summer months except for most mountain resort areas.

The purpose of this report is to provide a baseline of the current situation, summarize current visitors and identify market potential, identify two projects that could enhance shoulder and winter opportunities and refer the reader to key resources that could support local government and operators to mobilize together to enhance their current offerings and to create new experiences. This report and the corresponding online resources are accessible through a dedicated website in support of the local tourism industry in the Similkameen Valley, BC. Visit https://industry.similkameenvalley.com/

Visitor demand is expected to recover although its composition will differ from prior to the COVID-19 pandemic due to changing demographics, travel values and the lingering impacts of the pandemic. For smaller destinations like the Similkameen Valley there is some good news. Trends such as remote work, sustainability, cleanliness and hygiene can be the foundation for refining the brand promise to better differentiate from over-visited and less sustainable urban centres and resort communities. For this to happen, however, operators will have to innovate and develop new capacity to entice demand off the beaten path and away from the 10-week peak summer season.

Seasonality affects operators in the Similkameen Valley and by extension the destination. The adverse effects on industry are well documented and can be acute in smaller, rural communities:

- revenues and cash flow concentrated in a few months;
- underutilized assets and facilities;
- challenges accessing capital;
- challenges recruiting and retaining qualified management and staff;
- limited capacity for expanding experiences and markets;
- need for pursuing other sources of income.

Increasing visitor demand outside the summer seasons can be achieved through the following.[1]

- making experiences available for all seasons;
- building on the inherent authenticity of the Similkameen Valley for new experiences;
- reorienting marketing to engage new traveller types;
- off-season pricing that incentivizes travel;
- building on off-season events, festivals and sports that utilize available capacity; and
- helping operators become market and export-ready so they can scale up their marketing and operations.

[1] TIAC. no date. Elevating Canadian Experiences: Developing Winter and Shoulder Season Tourism.

2 Introduction

2.1 Background

As the tourism industry, and the world in general, recovers from the impacts of the world pandemic from COVID-19 - businesses, communities and visitor destinations are re-thinking tourism. In addition, climate events have been escalating in BC, and around the world in the past decade and impacts are being felt throughout our communities.

Relevant to this project, the tourism industry in BC has been seasonal for many communities, typically in the summer months and for those with winter products, winter may be peak season. For the Similkameen Valley visitor data indicates a similar pattern with visitors to the Regional District Okanagan Similkameen (RDOS), the Thompson Okanagan region, BC (and Canada in general), that summer is peak season and to expand tourism into shoulder (spring or fall) or winter seasons is dependent on several supply and demand factors. This report and corresponding online website dedicated to the local tourism industry support the opportunity to expand peak season. Note: the Town of Princeton experienced extreme flooding and subsequent damage and displacement of their residents in the fall of 2021 adding additional challenges for this area of the Similkameen Valley.

Destination Canada recently released the 40 key trends shaping the future of Canada's tourism industry. A critical finding is the emerging consumer preferences align with a more aspirational level of tourism. The travellers of tomorrow have a strong affinity to connect with the people and places they visit – they want to give back to the communities they visit.

The report reveals the trends influencing the traveller of tomorrow by three key areas:

- **Macro trends:** The profound socio-economic changes that will affect businesses and communities of all kinds, including climate change and accelerated digitalization.
- **Industry Trends:** Key challenges that will impact Canadian tourism businesses, such as reduced transport connectivity and labour shortages.
- **Market Trends:** Changes in consumer behaviour and values that will influence tourism businesses operational models, product and service development, channel marketing budgets, and focus for the future, including trends such as responsible travel, health and wellbeing and Indigenous connection.

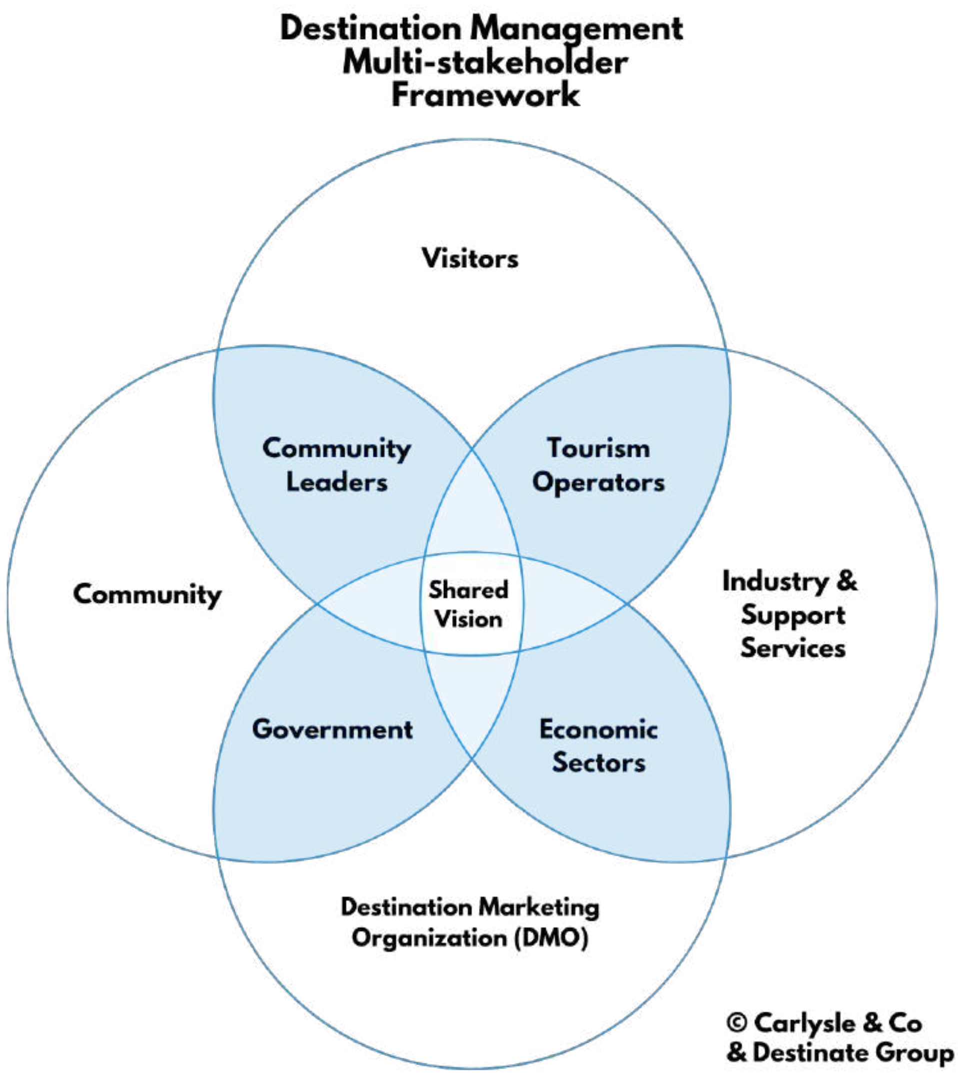
Further, the 2021 DestinationNEXT Futures Study focuses on three transformational opportunities to help destination leaders formulate strategic decisions for the future.

- **Destination Alignment:** Aligning the public, private and civic sectors drive destination performance
- **Sustainable Development:** Destination and product development should marry people, planet, profit and policy
- **Values Based Marketing:** A community's values, goals and creative energy are the new competitive advantage

According to DestinationNEXT Destination Alignment is one of three transformative opportunities for destinations. Destinations of all sizes are more competitive in the global visitor economy when government, community and industry priorities are aligned as much as possible. A whole-of-destination approach, where the public, private and civic sectors are all speaking to each other, creates stronger communities that elevates the visitor experience, supports sustainable and economic development across all sectors, and improves quality of life for residents.

Further Destination NEXT indicates the most effective destination organizations strive to enhance the competitiveness and sustainability of their destination within a harmonious relationship between the residents and visitors. In addition, they have the support of government officials and area residents who believe that the visitor industry positively impacts the local economy and elevates the overall quality of life. Progressive destination organizations are visionary, innovative, and aspirational, with the best interests of their communities at heart. But without a high level of community alignment, support, and engagement, it can be challenging to implement new strategic initiatives that elevate the destination experience for travellers and improve livability for residents. When government and residents agree on the value of the visitor industry to accelerate long term economic and community development, then it is much easier to build support for new destination stewardship initiatives that benefit locals and visitors.

This diagram (right) illustrates the interconnectivity of the stakeholders who make up a community tourism destination management framework for collaboration.



2.2 Report Purpose

The purpose of this report and corresponding online industry website for the local tourism industry is to provide a baseline of current visitors and market potential, identify two projects that could enhance shoulder and winter opportunities, identify key resources that could support local operators to mobilize together to enhance their current offerings and to create new experiences.

This report and the corresponding resources are accessible through a dedicated website to support the local tourism industry in the Similkameen Valley, BC.

Refer to https://industry.similkameenvalley.com/

2.3 Methodology & Engagement

The process included an update of the businesses listed in tourism in the Similkameen Valley as displayed on similkameenvalley.com, an industry e-newsletter announced the project, an online survey to those on the business database was conducted, information interviews with board members of the Similkameen Valley Planning Society, the Town of Princeton economic development officer, local organizations and select tourism operators was conducted. Further the baseline visitor and market data project was conducted specifically for this project to gather both insights to support the case for seasonal opportunities and as a legacy for tourism operators to use this information to support their individual businesses.

Tourism Planning Framework

When considering destination planning (in any context) the following four pillars support the overall vision for the destination. They include:

- **Destination Insights** includes gathering and utilizing research and insights about the destination, the markets, and internal and external factors to inform strategic planning and ultimately the performance measures.
- **Destination Sustainability** includes balancing tourism's economic, social, and environmental impacts, while addressing the needs of visitors, the industry, the environment, and the community.
- **Destination Development** includes strategic planning for and advancement of tourism supply by providing compelling experiences, quality infrastructure, and remarkable services to entice visitation.
- **Destination Marketing** includes identifying visitor experiences and promoting the destination to attract visitors. Ensuring brand alignment with the visitor experience.

Destination Management Framework by Key Function

DESTINATION MARKETING

VISITOR FOCUSED:

destination brand
visitor experience
visitor promotions
visitor digital presence

COMMUNITY DRIVEN:

destination brand
communications & public relations
industry communications
community digital presence

DESTINATION SUSTAINABILITY

VISITOR FOCUSED:

visitor commitment

COMMUNITY DRIVEN:

community commitment
crisis management
policy & funding
sustainable programs:

social wellbeing & culture
economic impact
environmental stewardship

SHARED DESTINATION VISION & CULTURE

DESTINATION INSIGHTS

VISITOR FOCUSED:

visitor profiles
market profiles
key performance indicators

COMMUNITY DRIVEN:

engagement
resident sentiment
destination profile
key performance indicators

DESTINATION DEVELOPMENT

VISITOR FOCUSED:

product development
industry development
visitor services

COMMUNITY DRIVEN:

asset management & infrastructure
workplace development
economic development

3 The Current Landscape: Adjusting to a New Reality

3.1 The economic impacts of COVID-19

COVID-19 has had an adverse effect on the national and provincial tourism industries and changed market dynamics as the pandemic continues to evolve. The visitor economy saw unprecedented losses in 2020 alongside business closures and rising unemployment. Although some travel metrics improved in 2021, demand and spending continued to fall well short of pre-pandemic levels.

Tourism is a service industry that relies on the unimpeded movement of domestic and international visitors to destinations. Travel restrictions and other health measures have therefore impacted tourism more than almost any other sector of the Canadian economy. Canada's major cities have been hit the hardest by the loss of tourism revenue, but smaller communities have seen major declines in visitor volumes as well.

Figure 1 Change in BC Tourism, 2020 versus 2019[2]

Revenue	Tax Revenues	GDP	Payroll	Jobs
↓ 65%	↓ 59%	↓ 67%	↓ 64%	↓ 64%

The adverse effects of the reduced visitor economy have fallen disproportionately on the transportation and hospitality sectors and its employees, including women, immigrants and youth.

The recovery in tourism is likely to take years, with the return of international visitors lagging the revival of domestic travel.[3]

3.2 Changes in travel and tourism

The recovery for tourism will be driven by pandemic-related forces as well as by changing consumer behaviour and overall travel conditions.

In the short term, international flows will continue to be highly influenced by cases and variants, vaccination rates, perceptions of safety and travel restrictions and requirements.[4] However, recovery will be uneven, uncertain and vary significantly by region and destination. Smaller, rural communities may benefit from travellers looking for less crowded destinations outside major urban areas that are also within easy reach of major markets.[5]

[2] Destination BC. 2022. Destination BC's 2020 Value of Tourism, February 2022.
[3] Destination Canada. 2022. Revisiting Tourism: Canada's Visitor Economy One Year into the Global Pandemic.
[4] Destination Canada. 2021. Destination Canada Visitor Economy Forecast Update June 2021.
[5] TIAC. no date. Elevating Canadian Experiences: Developing Winter and Shoulder Season Tourism.

3.3 Looking ahead to 2022 and beyond

The trends outlined in Table 1 focus on winter and shoulder season travel within the context of COVID-19 recovery. Even though visitor demand will recover in the coming years, its composition will differ from 2019 and before due to changing demographics, travel values and the lingering impacts of the pandemic. For smaller destinations like the Similkameen Valley there is some good news. Trends such as remote work, sustainability, cleanliness and hygiene can be the foundation for refining the brand promise to better differentiate from over-visited and less sustainable urban centres and resort communities. For this to happen, however, operators will have to innovate and develop new capacity to entice demand off the beaten path and away from the 10-week peak summer season.

Table 1 Key Trends Affecting Winter and Shoulder Tourism Development in Canada

Trend	Implications	
	Destinations	Operators
Remote work	Alignment of visitor and resident attraction	Travel packages for digital nomads
Sustainability	Sustainability as part of Destination Management	Align products/offers with destination sustainability standards
Cleanliness and hygiene	Tourism health and safety certifications	Certification from sources like EarthCheck as a differentiator
Rural tourism	Redirect visitors away from high use destinations	Partnerships for year-round offers
Slow travel	Plan for longer stays, integration into communities	Local, authentic experiences, not just activities
Wellness tourism	Develop wellness infrastructure	Develop value-for money offers
Last-minute bookings	New methodologies for data tracking	New operating models that can scale and adapt to changes in demand
Younger travellers	Profile travel, social values	Pilot new offers to Gen X and millennials
Supporting local	Domestic tourism strategies	Emphasize “loving what’s local”
Brand authenticity	Articulate branding in terms of health, safety and responsibility	Demonstrate value, prove consciousness of health risks
Vaccinations, testing, proving	Harmonized testing protocols	Collaboration with health authorities

4 Seasonality: Problem or Opportunity?

4.1 Winter and shoulder season definitions

- High Season - The traditional high season is June to August, except for ski resorts.
- Low Season - The low season is November to March.
- Shoulder Season – The shoulder season separates the high and low seasons. BC has two shoulder seasons, between September to November and April to May.
- Winter Season - The winter season is typically from December to March.

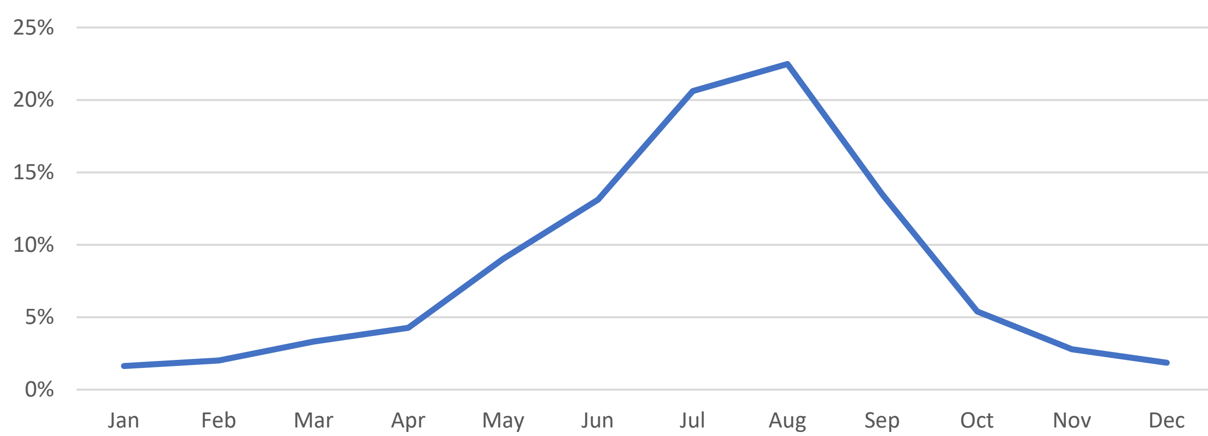
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Winter			Shoulder		High			Shoulder			
Low										Low	

4.2 Seasonality in the Similkameen Valley

The visitor economy in the Similkameen Valley is highly dependent on the summer high season with very low visitor volumes and spending in the low and winter seasons. As seen in Figure 2, 56% of visitors arrive between June and August, however, September is also a busy month, with 14%. From there, the drop-off in attendance is dramatic--only one in five visitors arrive between October and April.

Seasonality in the Similkameen is attributable to a combination of factors. The lack of a major winter product such as downhill skiing is one, highway travel conditions in winter is another. The small size of the industry locally and off-season closures limits capacity for attracting more demand outside of summer. A general lack of awareness of the opportunities that do exist is also a consideration.

Figure 2 Keremeos and Princeton Visitor Centre Attendance, Average Percent by Month, 2012 to 2019



4.3 The effects of seasonality on the Similkameen Valley

Seasonality affects operators in the Similkameen Valley and by extension the destination. The adverse effects on industry are well documented and can be acute in smaller, rural communities:

- revenues and cash flow concentrated in a few months;
- underutilized assets and facilities;
- challenges accessing capital;
- challenges recruiting and retaining qualified management and staff;
- limited capacity for expanding experiences and markets;
- need for pursuing other sources of income.

Businesspeople are looking for places where they believe they are going to get the greatest return on their investment. For some operators attracted by the lifestyle, seasonality can be an advantage, however for those who must make substantial investments in buildings and equipment (such as accommodators), seasonality can be a liability. Operators that develop longer seasons can provide better and more predictable returns for themselves and their partners.

Communities in the Similkameen Valley bear the costs of seasonality as well, from distorted labour and housing markets to social impacts such as congestion and anti-social behaviour by visitors during the high season. A dispersion of visitors across the region and across the different seasons has the potential to increase overall economic benefits while providing opportunities for a more diversified destination.

4.4 How to boost tourism year-round

Increasing visitor demand outside the summer seasons can be achieved through the following.[6]

- making experiences available for all seasons;
- building on the inherent authenticity of the Similkameen Valley for new experiences;
- reorienting marketing to engage new traveller types;
- off-season pricing that incentivizes travel;
- building on off-season events, festivals and sports that utilize available capacity; and
- helping operators become market and export-ready so they can scale up their experience design, marketing and operations.

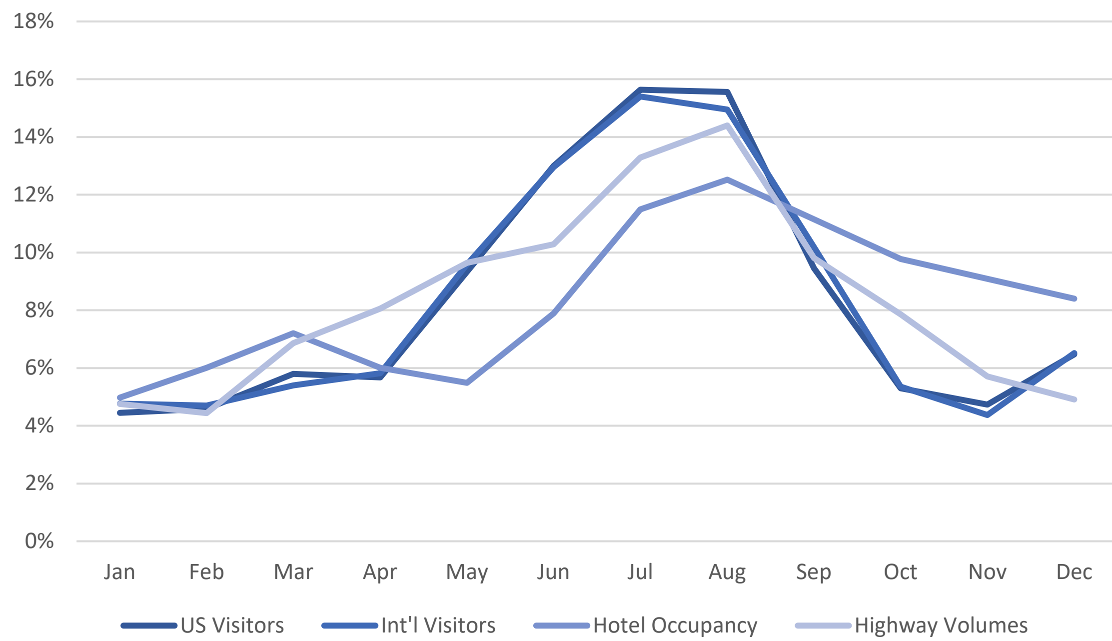
[6] TIAC. no date. Elevating Canadian Experiences: Developing Winter and Shoulder Season Tourism.

5 Trends, Insights and Analytics

5.1 Monthly visitation trends

Tourism in Canada and BC is still concentrated in the high season even though overall visitation is dominated by major urban centres with a greater variety of year-round visitor offers. Figure 3 shows four key activity metrics (International and USA visitation, hotel occupancies and highway traffic volumes) by month in 2019 (pre-COVID historical baseline), with consistent clustering in the June to September period.

Figure 3 BC Visitor Indicators by Month, 2019



A key measure of tourism activity is overnight stays, shown in Figure 4 and Figure 5 BC and Alberta travellers to the Thompson Okanagan between 2019 and 2021. The monthly distribution of data is like the BC data presented above and holds for 2020 and 2021 when almost all international visitation disappeared from the region.

Figure 4 BC Overnight Stays in the Thompson Okanagan by Month[7]

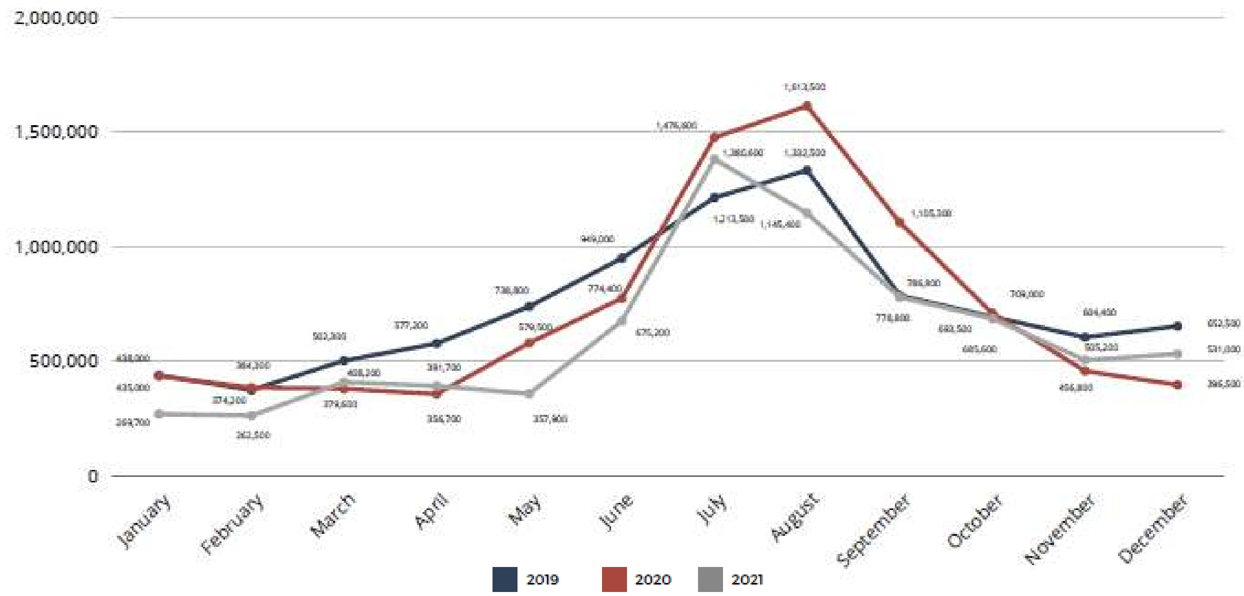
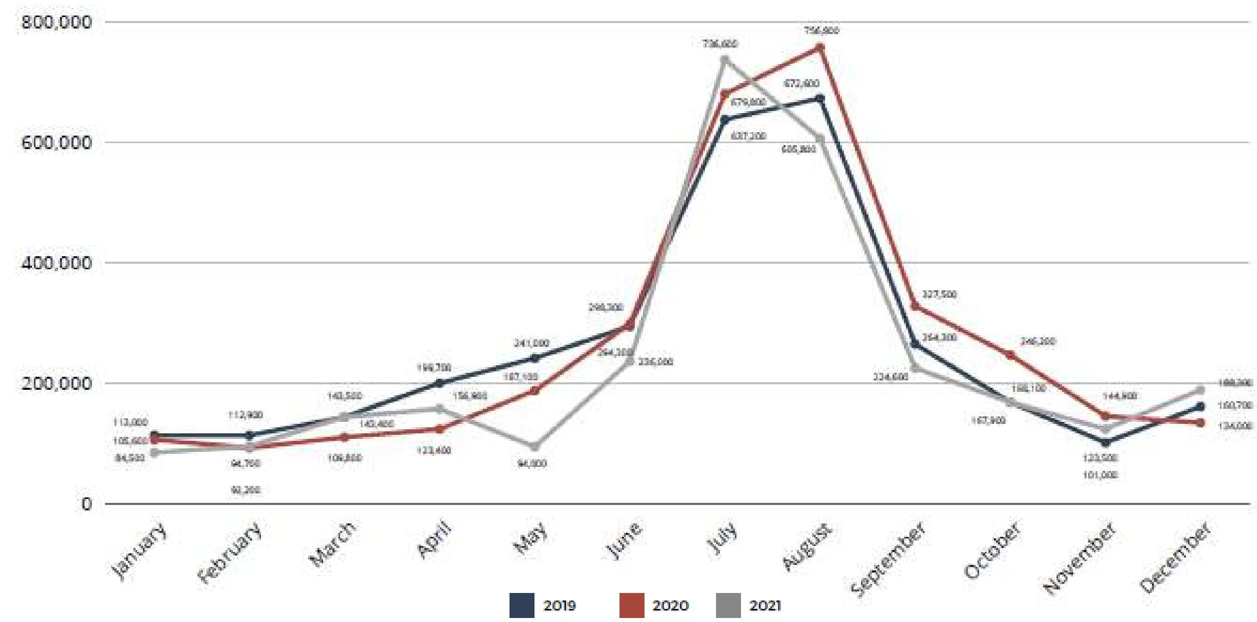


Figure 5 Alberta Overnight Stays in the Thompson Okanagan by Month[8]



Figures 6, 7, and 8 show similar patterns from the number one domestic market for the Similkameen Valley, BC.

[7] BCRTS. 2022. 2021 Year in Review British Columbia, Alberta & Canada Thompson Okanagan Region.
[8] BCRTS. 2022. 2021 Year in Review British Columbia, Alberta & Canada Thompson Okanagan Region.

Figure 6 BC Visitors travelling to the Regional District Okanagan Similkameen (RDOS) by Month[9]

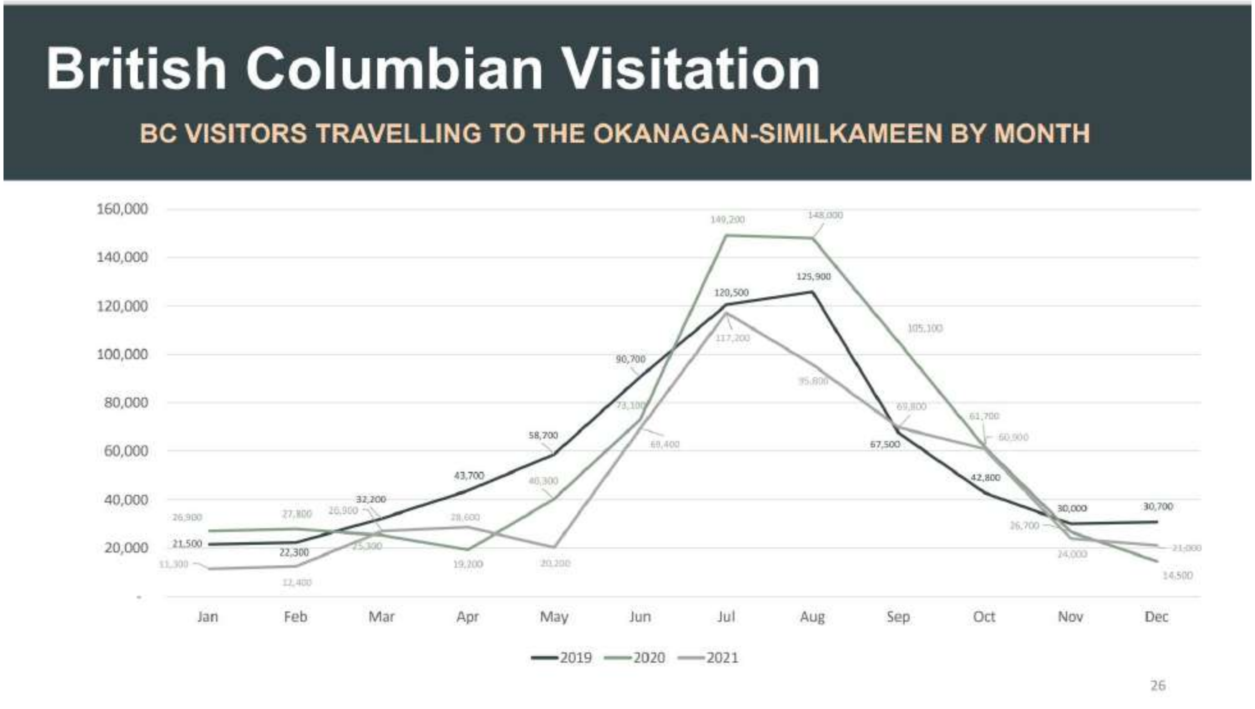


Figure 7 BC trips to the Regional District Okanagan Similkameen (RDOS) Month[10]

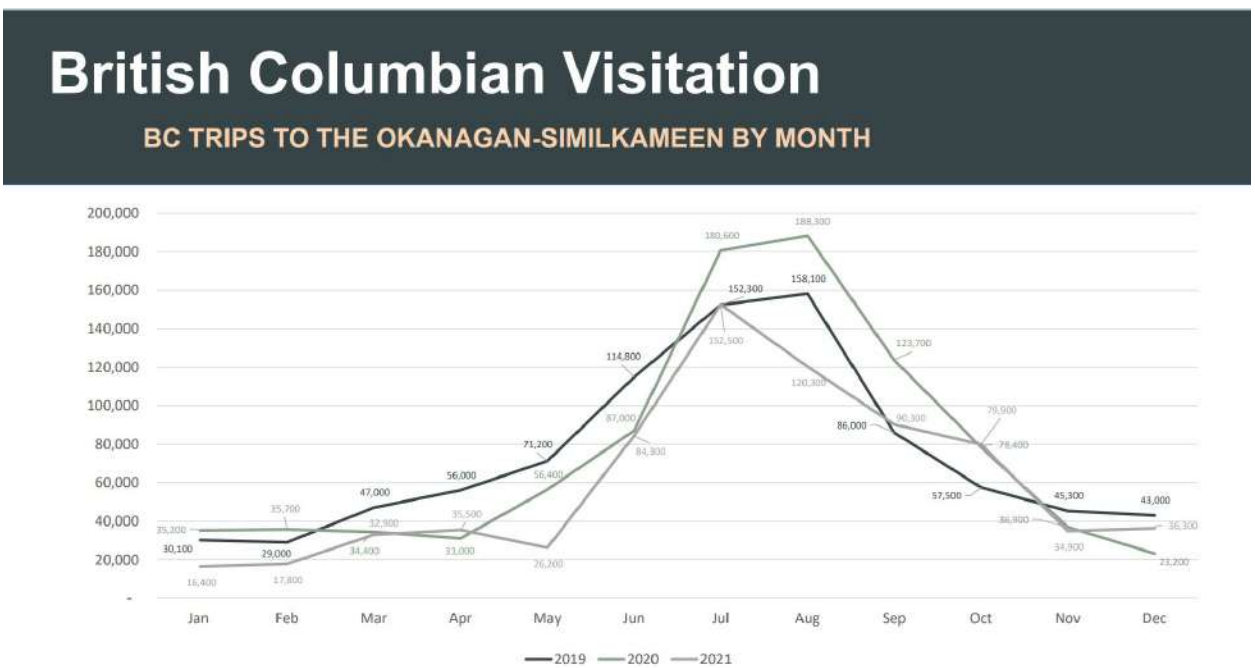
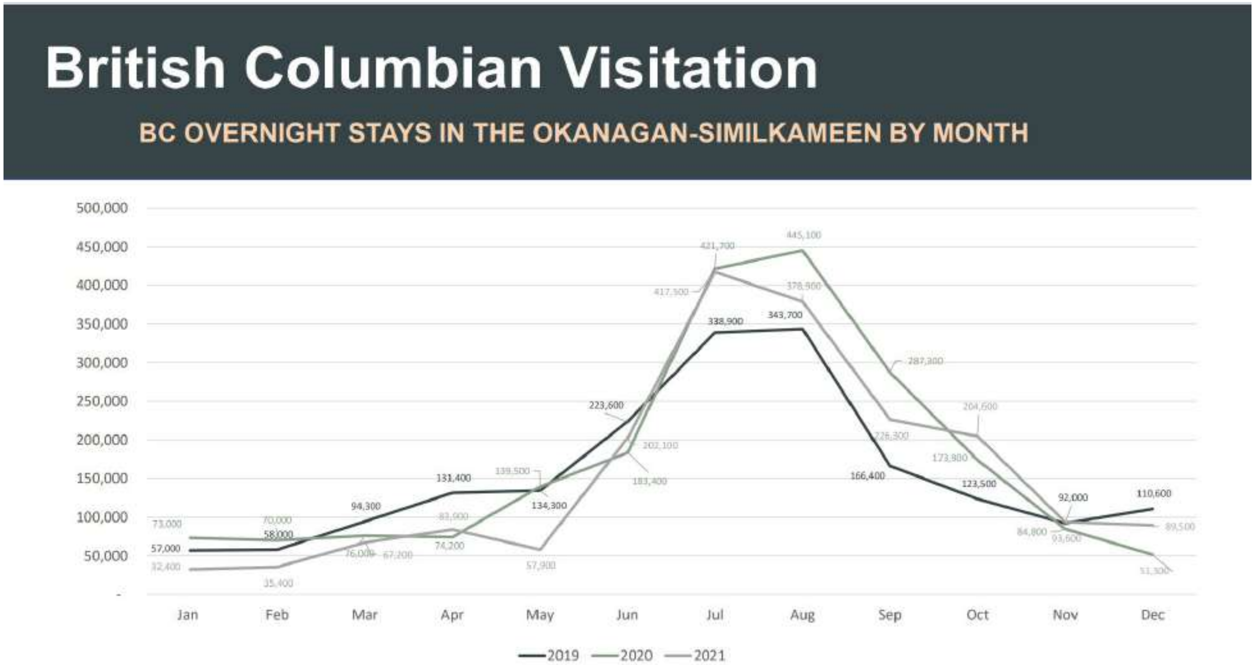


Figure 8 BC Overnight Stays to the Regional District Okanagan Similkameen (RDOS) by Month[11]



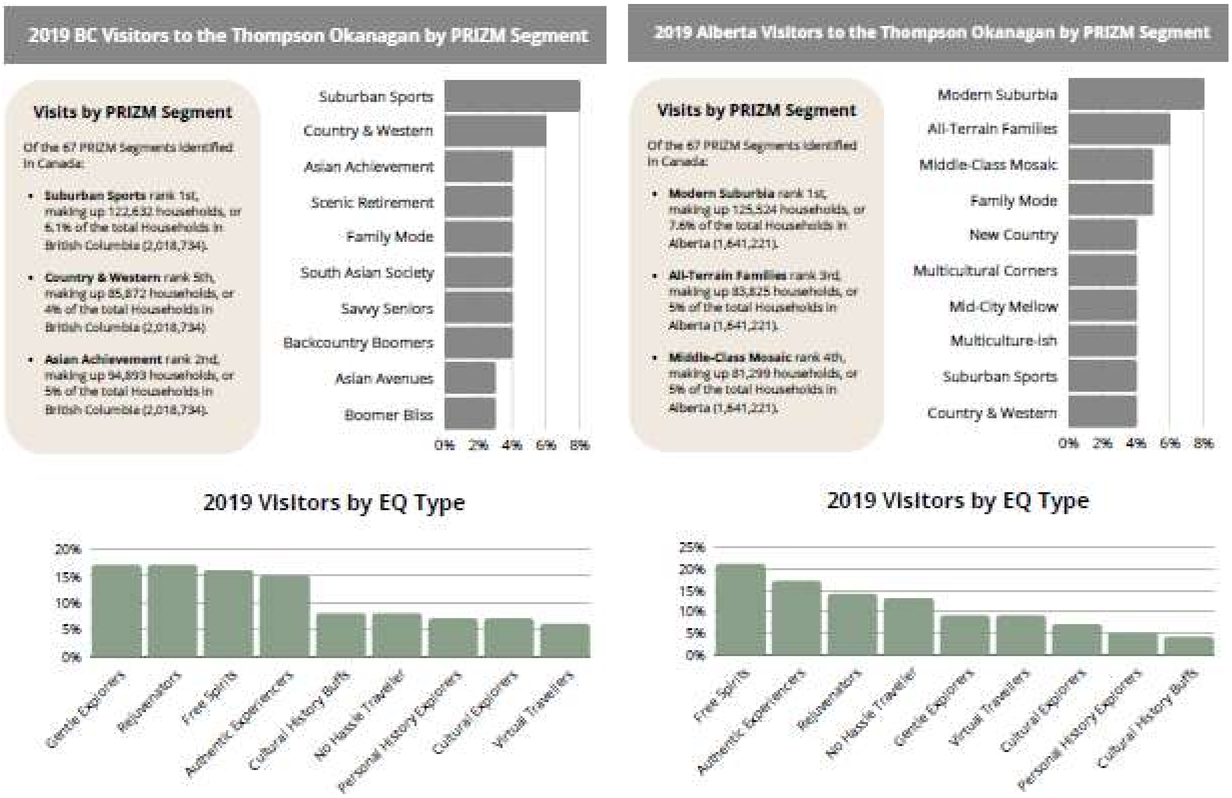
5.2 Visitor markets

The Thompson Okanagan region relies heavily on domestic visitors from BC and Alberta to drive the visitor economy. PRIZM and Explore Quotient (EQ) segments for these two markets in 2019 (baseline prior to COVID-19) are presented in Figure 6.[12]

It is noted that several EQ segments, especially Free Spirits, Cultural Explorers and Cultural History Buffs are interested in more winter activities. This holds true not just for travellers from BC and Alberta but from overseas as well, particularly Europe, Mexico and Japan.[13]

[9] Regional District Okanagan Similkameen (RDOS) Custom Report Symphony Tourism Services
[10] Regional District Okanagan Similkameen (RDOS) Custom Report Symphony Tourism Services, 2022
[11] Regional District Okanagan Similkameen (RDOS) Custom Report Symphony Tourism Services
[12] Readers can find out more about these segmentation methods at PRIZM and EQ.
[13] Destination Canada. 2015. EQ Profiles.

Figure 6 BC and Alberta PRIZM and EQ Segments to the Thompson Okanagan, 2019[14]



Top BC Visitor Origin, PRIZM and EQ Segments to the Regional District Okanagan Similkameen (RDOS)

Top Visitor Origin of BC Residents originate from Vancouver, Surrey, Kelowna, and Abbotsford consistently from 2019 (baseline), 2020 (COVID), and 2021. While overall volume decreased from each location during the period 2019-2021, these communities remain interested in the RDOS area. Further visitation from Penticton ranked in 2021 but not 2019-2020.

Top EQ types from BC found in all four quarters over the three-year period from 2019-2021 include Rejuvenators, Gentle Explorers, Free Spirits, Authentic Experiencers with Free Spirits and Authentic Experiencers ranking one and two respectively followed by and Gentle Explorers, for the summer season while Rejuvenators, Gentle Explorers dominate for October to March (off peak summer season), followed by Authentic Experiencers and Free Spirits. Note: in 2021 Free Spirits dominated in Jan-March 2021 for the first time.

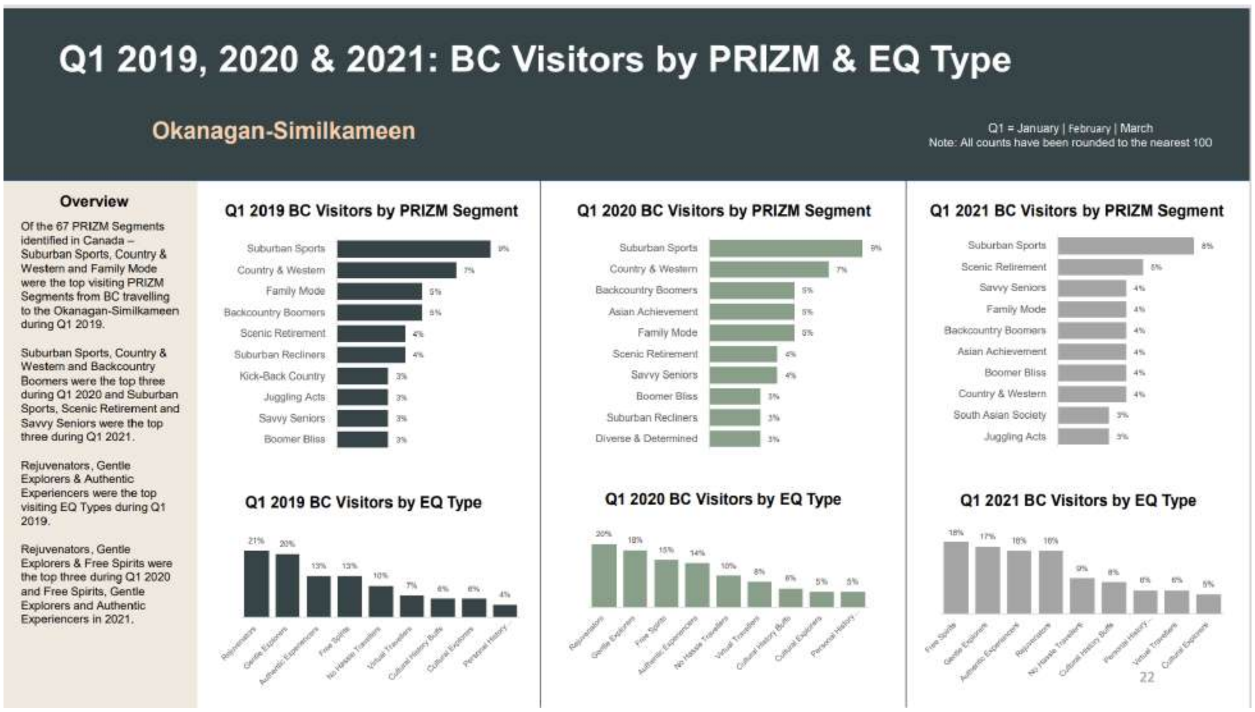
The opportunity to understand the difference in the types of visitors by season and throughout the past three-years allows both operators and marketers to consider their product and experiences they are offering for these seasonal differences.

[14] BCRTS. 2022. 2021 Year in Review British Columbia, Alberta & Canada Thompson Okanagan Region.

Top PRIZM segments from BC by all four quarters from 2019-2021 is Suburban Sports (given this segment is the largest in BC this is not surprizing), followed by Country & Western, except peak summer season which Asian Achievement ranked number two.

Figure 7 is an example of one quarter showing both the top PRIZM and EQ segments for an offseason period. The full report with all four quarters and information on the Alberta market can be found on the website.

Figure 7 Top BC Visitor Origin, PRIZM and EQ Segments to the Regional District Okanagan Similkameen (RDOS) Q1[15]



5.3 Top winter and shoulder season market insights

- High season travel is very pronounced in BC and the Thompson Okanagan but there is increasing activity in the shoulder season months of June and September. Due to congestion, high travel costs and an aging demographic that still has a high proportion of baby boomers, increased travel outside the summer months will increase in the future, provided supply conditions allow.
- Two-thirds of Americans, and majorities of Britons and Canadians, are amenable to shoulder season travel to avoid crowding and congestion.[16]
- Poor weather, closed attractions and school holidays in the UK market are disincentives to travel in the shoulder season. Longer operating seasons and experiences that account for bad weather can mitigate these constraints and boost demand accordingly.

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[15] Regional District Okanagan Similkameen (RDOS) Custom Report Symphony Tourism Services, 2022.
[16] TIAC. no date. Elevating Canadian Experiences: Developing Winter and Shoulder Season Tourism.

- International brand awareness of Canada is limited to major destinations and increasing demand outside of Vancouver, Quebec, Toronto and Montreal will require market and product development.
- Research suggests that the activities of interest to high season and shoulder season travellers to Canada are much the same, implying that extending seasons is more about providing longer access to existing experiences than the need for totally new products.
- Winter festivals around the world, such as China's Harbin Ice Festival and Quebec City's Winter Carnival attract millions of visitors annually. New hotel and resort offerings in Nordic countries have clearly demonstrated that demand exists for alternatives to the warm weather holidays in the Caribbean; and winter tourism has become much more than holidaying at traditional mountain ski resorts. In the last 15 years, overnight tourist days in Iceland have increased more than ten-fold. Destinations that are successfully attracting winter visitors are developing innovative packages that combine a range of winter activities in a seamless manner.

6 Similkameen Industry Snapshot

6.1 Significant Features and Activities

The Similkameen has a combination of natural features, attractions and events that support visitor experiences and the tourism economy in the region (Table 2). The semi-arid landscape and climate is a defining characteristic of the Valley and responsible for many built attractions including orchards, vineyards and wineries that attract thousands of visitors annually. These are complemented by rivers and lakes that support a wide variety of water-based activities. There is a rich Indigenous cultural and settlement history linked to farming, mining and transportation. The Kettle Valley Railway and historic Dewdney and Hudson's Bay trails played major roles in the formation of British Columbia.

Table 2 Significant Features and Activities of the Similkameen Valley

Natural features	• Similkameen River/Falls • Ashnola River • Tulameen River/Falls • Provincial Parks & Protected Areas • Barcelo Canyon Falls	• Otter Lake • Lightning Lakes • Keremeos Columns • Wildlife
Attractions	• Grist Mill and Garden • Red Bridge • Golf Courses • Apex Mountain Resort • Kettle Valley Railway • Historic Trails (Dewdney, Blackeye) • Hedley Mascot Gold Mine • 20 Mile Creek • Snaza'ist Discovery Centre	• Orchards • Vineyards • Fruits Stands • Wineries • Museums • Coalmont Hotel • Granite Creek Ghost Town • Pictographs • Galleries and studios
Events (previous)	• Ashnola pow wow • Christmas Light Up Parade • Similkameen Sizzle • Meadowlark Festival • Traditional Music Fest	• Princeton Air Show • Tulameen Days • Rodeos (Elks, Chopaka) • Fat Dog 120, Ultra520K Canada • Organic Harvest Moon Festival
Activities	• Rock hounding • Geocaching • Birdwatching • Fishing • Hunting • Hiking • Mountain biking • ATVing • Gold panning	• Canoeing/kayaking • Swimming • Tubing/floating • Equestrian/trail riding • Wildlife viewing • Tours (scenic/wine/cultural) • Downhill skiing • Nordic skiing • Snowmobiling

6.2 Business Profile

The tourism sector in the Similkameen includes accommodation, food and beverage services and a selection of guided tours (Table 3). Most facilities are in Princeton, Keremeos, Tulameen, Hedley and Manning Provincial Park.

There is a variety of complementary visitor services as well, including two Visitor Centres, conference facilities, transportation providers, retail services and recreation clubs.

Table 3 Hospitality Facilities in the Similkameen

Accommodation	• Backcountry (1) • B&B (4) • Cabin/Cottage (8) • Campground/RV (10) • Corporate Retreat (2)	• Farm/Orchard/Vineyard Stay (8) • Hotel (1) • Inn/Lodge (6) • Motel (6)
Food and beverage	• Bakeries (5) • Cafes/Coffee Shops (6) • Cideries (2) • Dining (9)	• Fast Food (3) • Pub/Lounge (3) • Wineries (15) • Fruit/Orchard stands (16)
Tours	• Guided nature (5)	• Wineries (5)

Source: Similkameen Valley. 2022. Business Directory. https://similkameenvalley.com/directory-cat/accommodation/.
Note: Accommodation and Food and Beverage counts are by unique listing.

7 Winter and Shoulder Season Destination Strategy

7.1 Strategic framework essentials

7.1.1 Guiding Principals

The guiding principles outlined in Figure 7 will help the Similkameen Valley Planning Society (SVPS) develop and maintain momentum as it moves towards a seasonally diverse visitor economy. They represent a reference point for keeping the organization moving forward and businesses involved.

Figure 7 SVPS Guiding Principles

Act long term	Outcomes are optimal when they last
Be authentic	Strive to be true to place and express what is distinctive about our landscape and people
Work together	Progress is achieved with collaboration
Act sustainably	The responsible use of natural, built and human resources will keep our community healthy and our tourism economy strong

7.1.2 Challenges & Opportunities

In the context of winter and should season development, the Similkameen Valley has the outdoor assets, scenery and parks/trails, and in the case of Keremeos/Cawston the winery product, to entice new visits but one of its biggest challenges is the lack of a true winter product opportunity close in to either Princeton or Keremeos. Manning Provincial Park and Apex Mountain Resort have strong winter offers but neither are close to Keremeos or Princeton. The low room inventory and limited hospitality infrastructure make it tremendously challenging to develop a winter product due to cash flow and labour constraints. The best opportunities for seasonal diversification are in the shoulder periods for those experiences where proven demand—agri-tourism, indigenous tourism, wine tourism and outdoor adventure. It is noted, however, that the economic benefits of tourism are higher for overnight stays than day visits. For the Upper Similkameen there is a need for a higher room inventory so higher demand translates into higher spending levels.

Figure 8 Strengths, Challenges and Opportunities

Strengths

- Landscape, scenery
- Rivers
- Parks, protected areas
- Recreation sites and trails
- Culture & heritage
- Agriculture
- Wineries

Challenges

- Low awareness
- Short season
- Limited infrastructure
- Low room inventory
- Lack of tours
- Highly variable winter conditions
- Access to labour

Opportunities

- Accommodation
- Packaging, itineraries
- Shoulder season experiences
  - wineries and related
  - wellness tourism
  - agri-tourism
  - Indigenous tourism
  - events

7.1.3 Vision and Objectives

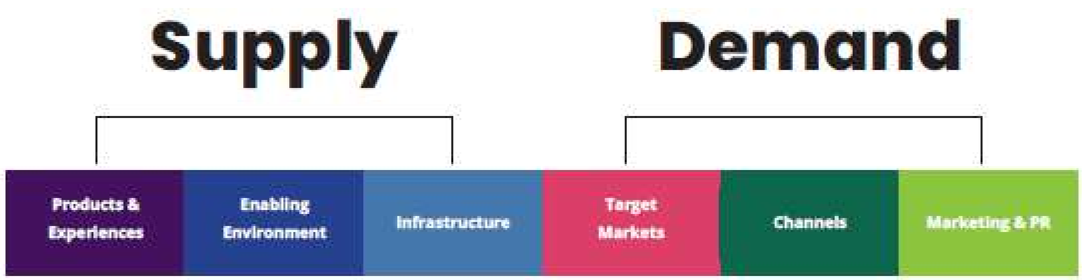
The underlying vision is a four-season outdoor recreation and cultural heritage playground with a range of accommodation types from rustic camping to quality resort lodgings. Objectives are as follows:

- Increase awareness of the Similkameen Valley and its brand among target markets;
- Increase the inventory of overnight-stay units;
- Cultivate a year-round destination;
- Encourage multi-day stays;
- Strengthen operator collaboration; and
- Develop at least two new market-ready, off-season experiences.

7.2 Lead Opportunities

Opportunities for action can arise from supply-side factors such as the infrastructure and products that attract visitors and spending, or demand-side factors such as targeting marketing and promotional activities that are focused on connecting with and drawing visitors to the region. Effective destination development strives to balance supply and demand conditions that maximizes the visitor economy without compromising environmental and socio-community sustainability standards (Figure 9).

Figure 9 Supply and Demand-led Opportunities



Source: Twenty31 Consulting (no date)

In terms of shoulder and winter diversification in the Similkameen Valley, the most pressing need is on building a more robust tourism supply with the appropriate level of marketing support. Marketing to bring in more visitors during the off season is unlikely to create a larger visitor economy unless the products and services are available to generate spend. As noted above, except for the two existing mountain resorts (Manning and Apex), the winter offer is limited and many hospitality services are scaled down to serve local markets, business travel and visiting of friends and relatives. The spring and all shoulder seasons hold out better potential in Princeton, Tulameen, Hedley and Keremeos because visitor demand is still relatively high and tourism operators can extend their existing season marginally (either starting earlier or staying open later).

The two lead opportunities, based on engagement feedback and analysis of the current situation in the Similkameen Valley, are a branded accommodation property (infrastructure) in the Princeton area and a wellness retreat (products and experiences) in the Keremeos/Cawston area.

7.2.1 Wellness retreat (Keremeos/Cawson)

Rationale:

To demonstrate effective partnering and packaging of existing products combined to create new experiences, a pilot project for the development and promotion of a new Wellness Retreat for the shoulder season will provide a case study example that will result in the creation of resources to support the local tourism operators to consider their own business opportunities.

Actions:

1.	Identify individual businesses who are interested in piloting a new visitor experience in collaboration
2.	Develop the concept of a Wellness Retreat
3.	Determine the resources and supports needed by the businesses to develop this new experience
4.	Utilize the new visitor and market research provided by the SVPS https://industry.similkameenvalley.com/research/
5.	Share key learnings and resources on the official Similkameen Valley tourism industry website https://industry.similkameenvalley.com/ to support other businesses

Roles, Resources and Risks:

- Led by interested operators, assisted by SVPS Tourism Services for access to visitor and market research, case study information posted on website
- Minimal time commitment

7.2.2 Hotel attraction (Princeton)

Rationale:

To generate more economic benefits out of tourism, the Similkameen Valley, and the Princeton area especially, require more room inventory to encourage overnight stays. Daily spending by overnight visitors in the Thompson Okanagan is approximately four times that of a day visitor. The vacancy rate in Princeton is believed to be very low because of business travel demand related to mine, mill and construction activities, but this has done little to encourage any investment in long-term accommodation properties (Schatz 2022, pers. comm.). The other issue is that Princeton lacks a quality branded facility such as a Best Western or Holiday Inn Express that would encourage travellers to consider an overnight stay and explore more of the experiences that are available. There would be more opportunities to create itineraries and packages for off-season golfing, outdoor recreation and event attendance as well as winter activities at China Ridge and the mountain resorts. Even winter camping could become a marketable experience providing before and after fixed-roof accommodation and other hospitality services are available. A branded or boutique hotel can generate sales for nearby retail and service businesses and capture tourism dollars in the community. It would also generate new tax revenues while creating new jobs for residents.

The Town of Princeton has applied for funding with the Economic Trust of the Southern Interior BC (ETSI-BC) fall intake; which, if successful, is for an investment attraction program, to include industry and community profiles. One of the target industries will be accommodation (Schatz 2022, pers. comm.).

Actions:

1. Create an investment case. This would consist of a local industry profile with supply and demand-side data, as well as market area business and tourism activity:	• inventory of properties and rooms • occupancy, average daily room and revenue per room rates (as there is no Municipal and Regional District Tax (MRDT) in Princeton this will require a survey of local properties) • inventory of demand generators such as natural or scenic sites, recreational activities, cultural or historic sites, special events and shopping and entertainment • traveller volumes, spending and market segmentation profiles • estimated lodging demand by business, leisure and visiting friends and relatives segments • retail sales • major employers • attendance trends at attractions and parks • highway traffic volumes
2. Work with Destination BC (DBC) and Thompson-Okanagan Tourism Association (TOTA) to identify the potential for group, small meeting and incentive travel segments in the area—this is currently a very small part of the accommodation market in the Similkameen Valley.	
3. Undertake location analysis to narrow down and provide data on a list of potential development sites. If practical and cost-effective, it might make sense to assemble suitable land parcels for eventual sale and transfer to a developer.	
4. Provide an incentive package to attract developer interest and investment:	• streamlined development permitting or pre-approved permitting for assembled parcels • ensure property tax rates are competitive • consider offering tax incentives for projects that meet heritage, revitalization or other development criteria that provide a net benefit to the community • transparent, supportive process • vision and focus for the community's future and its plans for expanding the local economy and the visitor economy • non-financial incentives and business facilitation, for example, in labour supply, training, education, recruitment and retention

Roles, Resources and Risks:

- Led by Town of Princeton, assisted by SVPS for access to visitor and market research
- Moderate time commitment, financial resources to be provided by ETSI-BC

7.3 Supporting Initiatives

The following initiatives can be implemented by SVPS as circumstances dictate and time and resources allow. They are meant to keep the focus on shoulder and winter season diversification and maintain momentum for the lead opportunities.

7.3.1 Website

The official website for tourism marketing for the Similkameen Valley has recently undergone a major content, navigation re-structure and SEO update to align with best practices to ensure an improved user experience in support continually creating awareness of the Similkameen Valley as most users are new to the website. The website is the official call to action for all marketing activities of the SVPS, however organic search continues to be the number source of users of the site. A new Winter section has been added to showcase winter products as they become market ready.

7.3.2 Identify shoulder and winter season markets

A comprehensive research process was undertaken for this project which includes 3-year visitor trend analysis by each quarter for the period 2019-2021. Further a 2022 year-in-review report will document the top EQ and PRIZM segments that visited the RDOS to monitor travel types returning to the RDOS.

For the RDOS number one domestic market BC Residents, current data suggests top EQ types for off-season based on previous visitation to the RDOS from 2019-2021 indicate Rejuvenators and Gentle Explorers dominate for October to March followed by Authentic Experiencers and Free Spirits. Note: in 2021 Free Spirits dominated in Jan-March 2021 for the first time. Full market profiles by EQ and PRIZM segments for the BC and Alberta market, plus BC Adventure Sports Enthusiasts, Culinary, Culture History, Cycling and Hiking can be found on the website. Each operator can determine the best match for their business or shoulder/winter season experience and review the corresponding market profiles.

7.3.3 Advertising and promotions

While the Similkameen Valley does not have a dedicated destination management organization, the SVPS does fund core destination marketing activities leveraged with Destination BC funding.

Core foundational marketing of the Similkameen Valley is present through an online presence of the official website https://similkameenvalley.com, Facebook and Instagram channels, Official Similkameen Valley Travel Experiences Guide (in partnership with Black Press) and regional and local pad maps. Consortium partnerships include the Crowsnest Tourism Alliance (a partnership of the SVPS, Similkameen Independent Winegrowers (SIW), Destination Osoyoos and Boundary Country (Regional District Kootenay Boundary), where the group has invested in a website portal as the main call-to-action for digital campaigns promoting travel in the BC and Alberta markets to the western section of Highway 3 with https://www.crowsnestscenic3.com/ supported by social media channels Facebook and Instagram.

7.3.4 Research

SVPS has participated in a research partnership with Destination Osoyoos for 2019-2022 data sources profiling the visitor to the Regional District Okanagan Similkameen (RDOS) area, which includes the Similkameen Valley and surrounding communities. The objective of the research is to understand who is coming from the primary market of BC (and Alberta as a secondary market) and to support local industry with these insights to apply to product and experience development and marketing for their own businesses. In addition to understanding visitor profiles with trend analysis dating back from 2018, identifying new target audiences also forms the market research strategy which include interest-based segments such as culinary, hiking, cycling, history and cultural enthusiasts. In addition to identifying these audiences postal code targeting through digital marketing provides a direct connection to these target audiences, which demonstrates the practical application of the information.

7.3.5 Off-season road conditions and winter content on the website

The SVPS added new content to the official website in 2022 to support winter travel including road and travel conditions to keep travellers informed and educated about off-season travel to the Similkameen. It is also important to ensure winter highway maintenance continues to be a high priority for the Ministry of Transportation and Infrastructure. Promote and highlight highway and safety improvements.

7.3.6 Itineraries and packages

Develop itineraries and packages for promotion on the SVPS website, with a focus on experiential packages that show off the Similkameen's distinction attributes. Itineraries should also be developed based on motivating experiences and learner segment visitor markets. Traditionally, a package would be a group of products and services (for example accommodation, transportation, meals, tours) presented as a unit and sold for one fixed price. Today, many travellers are seeking out experiential packages that provide encounters, interactions and lasting memories. The price of the package is based on the cost of the package components, plus a premium for the value travellers receive.

7.3.7 Remarkable Experiences

Promote uptake of the Destination BC Remarkable Experiences program among local operators, focusing on winter and shoulder season product development.

7.3.8 Winter camping

Work with Apex and Manning Park to pilot a winter camping experience that could be packaged with local operators and marketed through the SVPS website. Information and resources to local campgrounds and RV parks on winterizing their properties should also be considered. Currently the Town of Princeton operates the Municipal campground that open year-round. Monitor demand for winter-camping and expand opportunities from key learnings.

7.3.9 Innovation lab

The SVPS could host an annual innovation lab workshop with the objective of creating and testing/delivering a new product or experience. There is an obvious need to recruit and support an operator(s) as the pilot sponsor. The lab will generate interest and enthusiasm for pushing the envelope on innovative ideas for physical and temporal dispersion of tourism demand. It would also identify research and data resources for testing/piloting and provide industry-wide feedback on results and follow up.

7.3.10 Indigenous experiences

Work with Upper and Lower Similkameen bands to access Indigenous Tourism BC (ITBC) and Indigenous Tourism Canada programs and planning resources, targeting at least one new experience for the spring or fall. ITBC has received one-time funding earlier in 2022 from the BC Government for COVID recovery efforts aimed at the expansion of tourism business activities by Indigenous entrepreneurs and communities over the next two years.

7.3.11 Event Diversification

Developing new events can be a valuable tool for creating demand in the winter or shoulder season but the capacity for doing so in a small rural area like the Similkameen Valley is limited. Nevertheless, events and sports tournaments can be strong demand-generators and can have major payoffs over a short duration. An events strategy that targets either moving an existing long-standing and successful event outside the peak summer season, enhancing an event in the shoulder season or creating a new event is recommended. Additionally, a niche activity that the Similkameen already excels or could excel in should be the focus so organization and planning can be specific.

7.3.12 Infrastructure improvements

Continue to improve traveller infrastructure along highways #3, #3A and #5A including Wi-Fi services, rest stops, pullouts and points of interest that encourage less through travel. ETSI-BC and organizations like Connectivity BC are still funding infrastructure improvements but the SVPS needs to present a compelling application otherwise other communities and regions will be the recipients of financial assistance.

7.3.13 Trail improvements

Continue to support hiking/biking trail route integrity by lobbying Recreation Sites and Trails BC to fix washouts and improve surface quality, focusing on routes in proximity to staging area communities like Princeton and Keremeos. Encourage more business development on the trails and short-duration experiences. Provide support to volunteer groups undertaking trail building and maintenance.

7.3.14 Rentals and services

Continue to work with economic development offices and municipalities on profiling and promoting recreation rentals and related services to local entrepreneurs and businesspeople. Many travellers are not equipped for outdoor recreation activities, especially in the off-season. Bikes, ebikes, fishing, boating and other rentals provide those travellers with an opportunity to participate in an activity and stay longer in the region. Shuttle and transportation services can also be useful for encouraging one-way trail, river and lake excursions.

8 References

8.1 Abbreviations

AB	Alberta
BCP	BC Parks
DBC	Destination British Columbia
DI	Destinations International
DMO	Destination Management Organization
EQ	Explorer Quotient
MOE	Ministry of Environment
MRDT	Municipal and Regional District Tax
n/a	Not applicable
OCP	Official Community Plan
PUP	Park Use Permit
RFP	Request for Proposal
ROI	Return on Investment
SWOT	Strengths, Weaknesses, Opportunities, Threats
TBD	To be determined
TOTA	Thompson Okanagan Tourism Association
UNESCO	United Nations Educational and Scientific and Cultural Organisation
VC	Visitor Centre

8.2 Literature Cited

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Destination BC. 2022. *Visitor Centre Network Statistics Program Year Over Year Report 2010-2020.* Victoria, BC.

Destination Canada. 2015. EQ Profiles.

Destinations International. 2011. Standard DMO Performance Reporting A Handbook for Destination Marketing Organizations (DMOs).

Symphony Tourism Services. 2021. 2020 Visitor Insights Thompson Okanagan Region. Prepared for BC Regional Tourism Secretariat.

Twenty31 Consulting. No date. Elevating Canadian Experiences: Developing Winter and Shoulder Season Tourism.

8.3 SVPS & Town of Princeton Personal Communications

Manfred Bauer. Chair of SVPS & Mayor Village of Keremeos. Telephone interview, April 26, 2022.

George Bush. Director Electoral Area 'B', Regional District Okanagan Similkameen. Telephone interview, May 2, 2022.

Tim Roberts. Director Electoral Area 'G', Regional District Okanagan Similkameen. Telephone interview, May 2, 2022.

Gary Schatz, Director of Economic Development, Town of Princeton. Telephone interviews on April 25 and May 10, 2022.

Appendix A – Historical Tourism Data Tables

Figure 10 Seasonal Visitation to the Regional District Okanagan Similkameen – 2018 & 2019

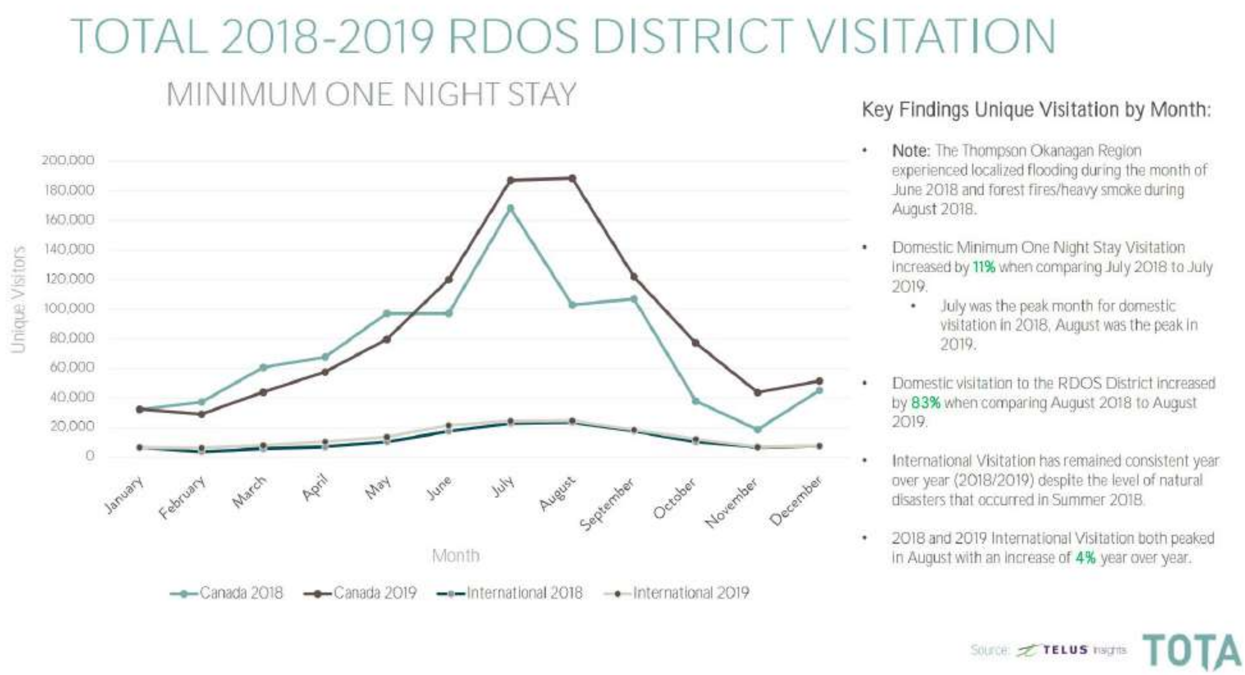
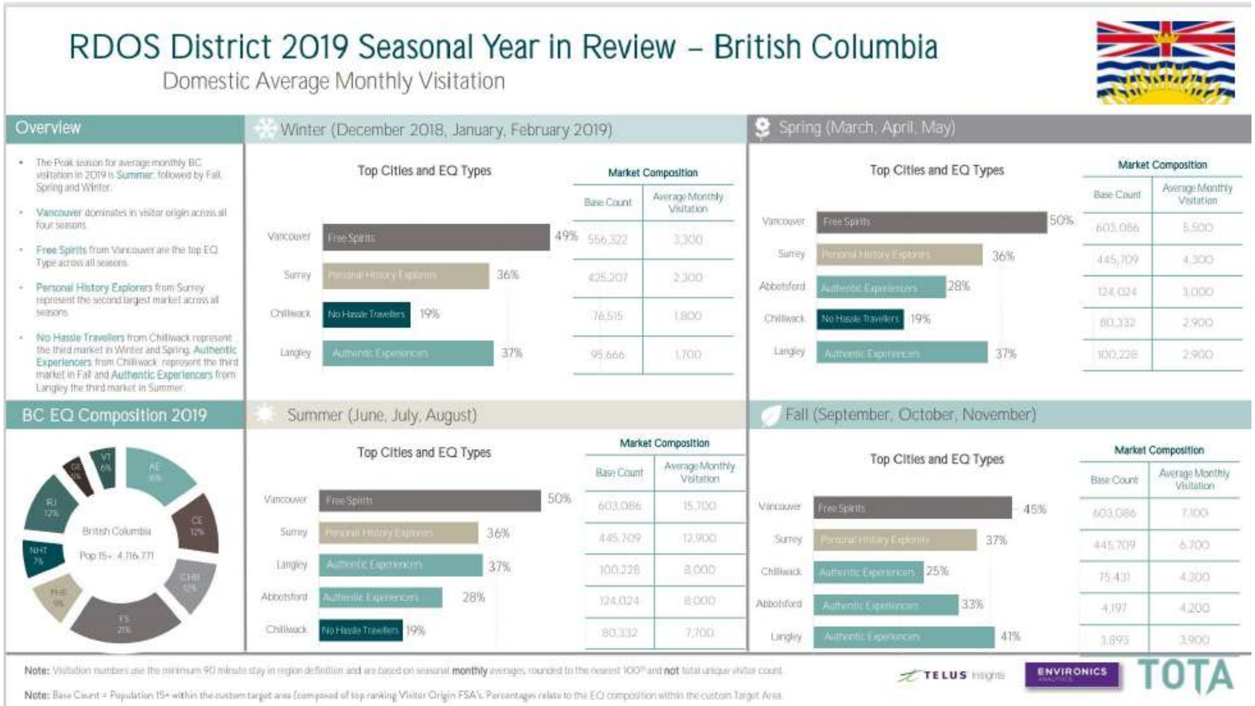


Figure 10 Seasonal Visitation to the Regional District Okanagan Similkameen – 2018 & 2019



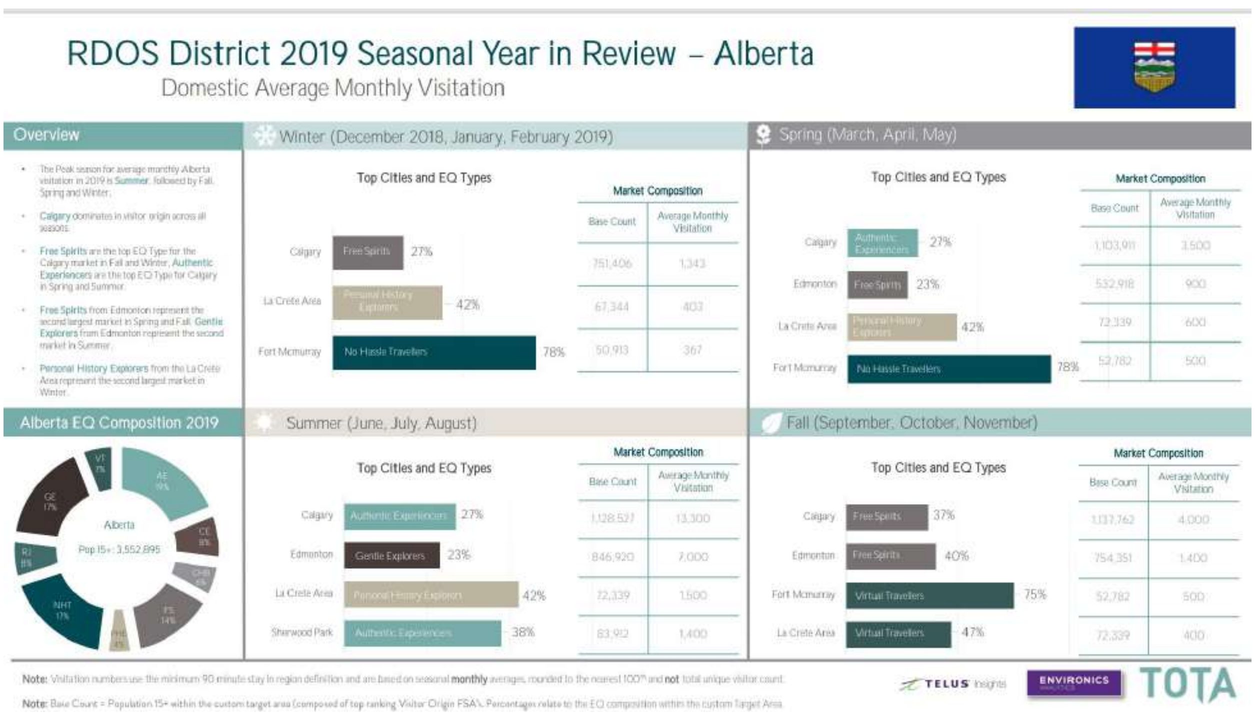
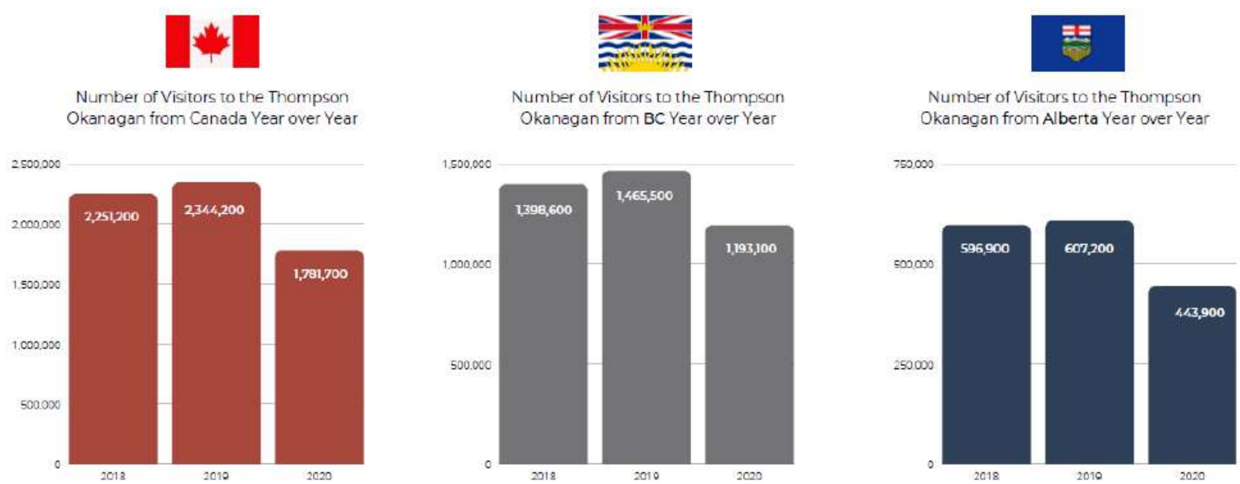


Figure 11 Canadian Travellers to Thompson Okanagan by Month, 2018-2020

Source: Symphony Tourism Services (2021)

Figure 12 Canada, BC and Alberta Visitors Travelling to the Thompson Okanagan Year Over Year



Source: Symphony Tourism Services (2021)

Figure 13 Top Origin Cities of Those Travelling to the Thompson Okanagan from BC by Year

City	2018 Visitor Count	City	2019 Visitor Count	City	2020 Visitor Count
Vancouver	146,800	Vancouver	166,100	Vancouver	133,700
Surrey	140,100	Surrey	145,200	Surrey	126,800
Kamloops	55,200	Kamloops	57,500	Kelowna	49,800
Abbotsford	53,900	Abbotsford	57,400	Abbotsford	49,000
Kelowna	52,200	Burnaby	55,700	Kamloops	46,200
Burnaby	51,400	Kelowna	55,700	Burnaby	45,200
Richmond	45,200	Richmond	49,700	Richmond	39,800
Langley	43,500	Langley	43,800	Langley	37,400
Coquitlam	37,700	Coquitlam	40,500	Coquitlam	33,000
Delta	34,100	Chilliwack	36,500	Chilliwack	29,900

Source: Symphony Tourism Services (2021)

Figure 14 Top PRIZM Segments of BC Travellers to the Thompson Okanagan

Category	Suburban Sports	Country & Western	Scenic Retirement	Asian Achievement	Family Mode
Household Count	• Rank 1st by Household Count • 123,442 households, or 6.1% of the total Households in BC	• Rank 3rd by Household Count • 87,601 households, or 4.4% of the total Households in BC	• Rank 2nd by Household Count • 94,025 households, or 4.7% of the total Households in BC	• Rank 5th by Household Count • 86,462 Households or 4.2% of the total Households in BC	• Rank 17th by Household Count • 51,487 Households or 2.6% of the total Households in BC
Maintainer Age	52	57	64	55	51
% of Children at Home	47% of couples have children living at home	48% of couples have children living at home	39% of couples have children living at home	55% of couples have children living at home	50% of couples have children living at home
Household Income	Above Average Household Income of $120,592 compared to BC at $106,681	Below Household Income of $91,291 compared to BC at $106,681	Average Household Income of $100,586 compared to BC at $106,681	Above Average Household Income of $120,295 compared to BC at $106,681	Above Average Household Income of $134,916 compared to BC at $106,681
Top Social Value	Racial Fusion	Attraction to Nature	Ethical Consumerism	Brand Genuineness	Racial Fusion
Social Media Habits	79% currently use Facebook, 36% use Instagram and 23% use Twitter	84% currently use Facebook, 33% use Instagram and 22% use Twitter	79% currently use Facebook, 30% use Instagram and 21% use Twitter	75% currently use Facebook, 41% use Instagram and 26% use Twitter	78% currently use Facebook, 35% use Instagram and 23% use Twitter

Source: Symphony Tourism Services (2021)

Figure 15 Top EQ Types of BC Travellers to the Thompson Okanagan

Category	Gentle Explorers	Rejuvenators	Free Spirits
Household Count	• Rank 1st by Household Count • 322,371 households, or 16% of the total Households in BC	• Rank 3rd by Household Count • 294,476 households, or 14.6% of the total Households in BC	• Rank 2nd by Household Count • 319,737 households, or 15.9% of the total Households in BC
Maintainer Age	54	59	52
% of Children at Home	47% of couples have children living at home	46% of couples have children living at home	56% of couples have children living at home
Household Income	Below Average Household Income of $93,549 compared to BC at $106,681	Average Household Income of $99,976 compared to BC at $106,681	Average Household Income of $114,381 compared to BC at $106,681
Top Social Value	Racial Fusion	Attraction to Nature	Consumption Evangelism
Social Media Habits	80% currently use Facebook, 35% use Instagram and 23% use Twitter	81% currently use Facebook, 32% use Instagram and 21% use Twitter	77% currently use Facebook, 42% use Instagram and 28% use Twitter

Source: Symphony Tourism Services (2021)

Figure 16 Top PRIZM Segments of Alberta Travellers to the Thompson Okanagan

Category	Modern Suburbia	All-Terrain Families	Family Mode	Middle-Class Mosaic	New Country
Household Count	• Rank 1st by Household Count • 123,489 households, or 7.5% of the total Households in AB	• Rank 3rd by Household Count • 85,544 households, or 5.2% of the total Households in AB	• Rank 7th by Household Count • 64,272 households, or 3.9% of the total Households in AB	• Rank 4th by Household Count • 81,980 households, or 5% of the total Households in AB	• Rank 5th by Household Count • 71,011 households, or 4.3% of the total Households in AB
Maintainer Age	41	42	48	52	55
% of Children at Home	58% of couples have children living at home	53% of couples have children living at home	54% of couples have children living at home	47% of couples have children living at home	54% of couples have children living at home
Household Income	Above Average Household Income of $141,199 compared to AB at $125,945	Above Average Household Income of $138,853 compared to AB at $125,945	Above Average Household Income of $150,792 compared to AB at $125,945	Below Average Household Income of $97,145 compared to AB at $125,945	Below Average Household Income of $107,836 compared to AB at $125,945
Top Social Value	Confidence in Advertising	Need for Escape	Need for Escape	Work Ethic	Attraction to Nature
Social Media Habits	77% currently use Facebook, 48% use Instagram and 36% use Twitter	78% currently use Facebook, 43% use Instagram and 31% use Twitter	77% currently use Facebook, 39% use Instagram and 29% use Twitter	81% currently use Facebook, 40% use Instagram and 31% use Twitter	80% currently use Facebook, 31% use Instagram and 21% use Twitter

Source: Symphony Tourism Services (2021)

Figure 17 Top EQ Types of Alberta Travellers to the Thompson Okanagan

Category	Free Spirits	Authentic Experiencers	Rejuvenators
Household Count	• Rank 1st by Household Count • 322,609 households, or 19.6% of the total Households in AB	• Rank 3rd by Household Count • 207,086 households, or 12.6% of the total Households in AB	• Rank 3rd by Household Count • 237,088 households, or 14.4% of the total Households in AB
Maintainer Age	46	57	55
% of Children at Home	53% of couples have children living at home	49% of couples have children living at home	54% of couples have children living at home
Household Income	Average Household Income of $122,710 compared to AB at $125,945	Above Average Household Income of $211,249 compared to AB at $125,945	Below Average Household Income of $110,045 compared to AB at $125,945
Top Social Value	Need for Escape	Culture Sampling	Attraction to Nature
Social Media Habits	79% currently use Facebook, 42% use Instagram and 33% use Twitter	76% currently use Facebook, 37% use Instagram and 30% use Twitter	80% currently use Facebook, 32% use Instagram and 22% use Twitter

Source: Symphony Tourism Services (2021)

Figure 18 Regional Visitor Profile, Thompson Okanagan 2017

Top five markets of origin (2014)		Share in Thompson Okanagan	
		Visitation	Spending
1	British Columbia	61%	44%
2	Alberta	19%	28%
3	United Kingdom	2%	3%
4	Australia	2%	4%

Primary accommodation*	BC residents	Other Canadians	US residents**	Other international**
Friends and family	50%	37%	39%	44%
Hotel	14%	17%	20%	28%
Motel	3%	5%	8%	8%
Other commercial fixed roof***	6%	8%	1%	10%
Camping / RV parks	18%	21%	8%	8%

	BC residents	Other Canadians	US residents***	Other international** *
1	Beach	Beach	National/provincial or nature park	National/provincial or nature park
2	Hiking or backpacking	Boating	Historic site	Wildlife viewing or bird watching
3	Camping	Hiking or backpacking	Wildlife viewing or bird watching	Historic site
4	Boating	National/provincial or nature park	Museum or art gallery	Museum or art gallery
5	National/provincial or nature park	Camping	Hiking or backpacking	Hiking or backpacking

Season of travel	BC residents	Other Canadians	US residents*	Other international*
January to March	14%	8%	16%	7%
April to June	24%	18%	19%	37%
July to September	45%	61%	54%	51%
October to December	18%	12%	11%	5%

Source: Destination BC (2017)

Appendix B - Key Trends

Tourism Trends

COVID-19 – The pandemic has devastated the travel economy in some sectors and countries but also repositioned demand to the benefit of some destinations. The most significant emergent trends are local travel/staycations, next level takeout by restaurants (picnic basket experiences for off-premises consumption), crowd control, travel bubbles and more private vehicle travel. Importantly, the impacts may not be temporary, even with the resolution of the COVID-19 virus, as other strains and varieties will undoubtedly emerge in the future.

Shifting Demographics – By 2030, the world's population is expected to increase 20% from today's 6.9 billion to 8.3 billion. Many developed countries have now progressively aging populations. Rural-to-urban migration continues to be a significant pattern within many countries. Millennials are the demographic cohort born between the early 1980s and the early 2000s. One of the largest generations in history, they have emerged as the tourism industry's most important not only because of their sheer size, but also for their appetite for international visits and stored demand for at least the next two to three decades. The top 2018 Millennial travel trends identified by STA Travel, the world's largest student and youth travel agency, shows that the overwhelming trend is for adventure travel. Social media is particularly important in travel decisions. Their interest in authentic and distinctive local experiences has resulted in leading global hotels responding with the introduction of nimble new services such as Edison bulbs in the bedrooms, cold-press-juice bars in the lobby and fast, free Wi-Fi everywhere. Innovation of this nature is becoming a significant factor in attracting this market, together with the need to provide opportunities to connect with local culture – its food, drink, and entertainment, and engage in unique adventure experiences while remaining a 'savvy spender.'

Disruptive Technologies - The use of mobile and other technology has exploded with most travellers now having near-constant access to web enabled devices. Mobile devices now account for most internet search requests and worldwide travel bookings and are now the world's preferred booking platform. It is a direct enabler of social media, with recommendations and stories from other travellers now the most influential source of information for travel destinations, with positive word of mouth driving travellers to act. Advocates are believed to represent up to 25% of the consumer base with the potential to influence the remaining 75%. New advances in Artificial Intelligence (AI) have implications for many areas of tourism from gaming and augmented reality experiences to robotics.

The Sharing Economy - Travel disrupters such as sharing economy organizations like Airbnb and Uber are changing the travel landscape. They have led to more traveller choice for accommodation and transportation trip components. Virtually unheard of 10 years ago, the sharing economy is now a multi-billion-dollar industry, with significant penetration in hospitality and transportation. Lyft, Uber and Airbnb are global companies whose services are likely to expand and diversify. The early adopters of disruptive travel technology are the Millennials, who happen to be confident in knowing what they want out of a unique trip no one else can say they had. The heavy use of social media and portable technology are linked to a shared economy that makes trip planning and trip engagement quick and easy.

Experiential travel - The umbrella trend that is now impacting all forms of tourism is the ever-increasing demand for experiences and the growth in experiential travel. It is evident across all age groups and generations. All elements of tourism and the hospitality sector have been responding to this trend and its impact has resulted in significant shift from developing products and things to do, to creating experiences that focus on the emotions, feelings and sensations that a visitor will experience within a destination, site or venue. In 2017 guides and operators added 30,000 new experiences to TripAdvisor alone. (Trekk Soft 2018)

Adventure Travel - The Global Adventure Tourism Market was valued at $586 million in 2018 and is projected to reach $1.6 billion in 2026. Expected compound annual growth over the next six years is expected to be more than 13% (AMR 2020). In British Colombia, direct tourist expenditures on wilderness tourism products are more than $1.5 billion dollars. In 2018 IntrepidTravel.com identified the growing significance of experiences to adventure travel as one of the top trends for the year.

Winter Tourism - More than three quarters of Americans would consider an overseas trip during the winter, with over half doing so without seeking a change in weather. In fact, winter festivals around the world attract millions of visitors, such as China's Harbin Ice Festival which had over a million visitors last year. New hotel and resort offerings in Nordic countries have clearly demonstrated that demand exists for alternatives to the warm weather holidays in the Caribbean; and winter tourism has become much more than holidaying at traditional mountain ski resorts. In the last 15 years, overnight tourist days in Iceland have increased more than ten-fold. Destinations that are successfully attracting winter visitors are developing innovative packages that combine a range of winter activities in a seamless manner.

Rural Tourism - Rural tourism represents the life, art, culture and heritage of rural locations by enabling interactions between tourists and locals for an enriching visitor experience. The term captures many different many forms of tourism, including agritourism, ethnic tourism, ecotourism, creative tourism, culinary tourism. Globalization has commoditized the tourism offer at many destinations, so there is any increasing premium placed on creativity and authenticity as differentiating experiences for tourists who are educated and enthusiastic about applying these principles. (Sasu and Epuran 2016)

Micro-adventures - In the ABTA Travel Trends Report for 2017 the growing demand for bookable micro-adventures was highlighted as a key trend shaping what travellers are doing on holiday. Defined as "small and achievable, for normal people with real lives," these can be anything from overnight treks to a cooking class or a two-day kayaking trip. Being "small," they are an affordable way to bring an element of excitement to a trip or they are used to form the core of a short break, and the interest in them is often fuelled by social media and news feeds.

Specialist Travel Experiences - Any destination with a competitive edge in a field of industry or technology has opportunities to leverage this unique element of competitiveness through the development of niche specialist travel experiences. There is a growing demand for innovative 'learning journeys,' highly specialised and based on knowledge exchanges around particular aspects of an industry or activity.

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