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Destination Marketing and Development Strategy 2028
FINAL

Presented to Shuswap Tourism
Last Updated March 28, 2024

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1. Executive Summary

The world has changed. So have the opportunities. With major destination players facing compression and over tourism, destinations like the Shuswap region have an immediate opportunity to build market share in a new destination management era focused on spreading the tourism base around, and outside traditional centres and corridors.

The aim is to thrive, not only grow. Improving community well-being is rooting itself as the driving purpose of tourism, and the rallying point for its most passionate and talented supporters. Ready to leap ahead in this new era, this *Shuswap Tourism Destination Marketing and Development Strategy 2028* is focused on creating a visitor economy that's sustainable, attractive, and supports a competitive advantage in completely new and underleveraged arenas of opportunity.

With the longtail impacts of COVID still present, BC short-haul and neighbouring provincial markets continue to lead the recovery until international markets regain momentum in 2026. With the right investment and marketing mix, the Shuswap region could grow its market share from the current 21% of Thompson Okanagan visitors.

Knowing it will take a community-powered approach to reach this new level, engagement with Shuswap Tourism stakeholders was deep and extensive. Part of a mixed-methods research and engagement approach, an estimated 5,000 primary data points served as the backbone for new ideas and important shifts.

Part of this effort, a destination brand audit revealed that greater collaboration and laddering up the market power of destination brands within the Shuswap region present significant opportunities and upside provided destination players are willing to work together efficiently and effectively on a common focus.

Imagining a future that everyone wants to work towards is the most important work of destination planning. It asks us to shift attention to what is possible and to suspend any reservations we might have that are grounded in the limitations of today.

Shuswap Region Destination Management Goal

By 2028, Improve Community Well-Being in the Shuswap Region by Continuously Working to Increase the Region's Tourism Quality of Life (TQOL) Index Score

Based on community feedback, the Shuswap region's vision for tourism is ultimately about community well-being, and thanks to advances in social sciences data

collection, the Tourism Quality of Life (TQOL) Index provides a powerful performance measure that can truly signal continuous improvement in reaching the goal.

Based on those principles and insights above, A total of six (6) areas of strategic focus offering the highest destination value have been put forward to help the Shuswap region destination achieve its main goal:

1. Build a More Redistributive, Resilient Local Economy: Improve profitability of locally owned businesses by bringing together Shuswap tourism-related business operators to pursue scale efficiencies to ensure businesses continue to generate outsized local impacts.
2. Make the Shuswap More Competitive: Strengthen destination position by satisfying market-demand for an enhanced breadth and depth of Shuswap region experiences in the spring and fall so that the region claims a clear advantage over competitors.
3. Flex the Full Strength of Our Experience: Harness latent experience strengths in hiking, culinary, culture, biking and birding by coordinating a heavy regional investment focus on sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.
4. Share the Best Bites of the Shuswap: Harness the collective market power of regional food tourism-related businesses so that the Shuswap region has formalized focus, capacity, and funding to develop a competitive advantage in the agritourism and culinary tourism space.
5. Foster the Secwépemc Indigenous Economy: Foster Indigenous entrepreneurship by supporting existing and new Indigenous tourism businesses with business coaching and mentoring that increases Indigenous operator capacity and improves the support they receive from their local community members, administrations, and traditional governance. Additionally, work with Secwépemc entrepreneurs to develop and launch Indigenous wildcrafting tours that will simultaneously support the local Indigenous economy and the Shuswap region's food tourism market development focus.
6. Empower People to Achieve: Nurture a tourism destination culture that fosters creativity, fresh perspectives, and understanding by implementing and encouraging local businesses and tour operators to enforce policies and programs designed to empower BIPOC, LGBTQ2S+, retirees, and women.

The main strategy and key initiatives for each are summarized in **Section 10** of the *Shuswap Tourism Destination Marketing and Development Strategy 2028*. Suggested milestones and estimated costs for each key initiative are detailed in supporting tables to help set short-, medium-, and longer-term planning priorities.

2. Project Overview

A destination's experience or product position coupled with its destination marketing effort are the two main factors that influence a destination's market share. The *Shuswap Tourism Destination Marketing and Development Strategy 2028* considers both part of the equation. With three-quarters of the effort mandated to go against destination development, work focused heavily on an analysis of the destination experience, supporting infrastructure and assets, overall tourism-related business needs and inputs like labour, transportation and logistics. The aim is to create a destination position that's sustainable, attractive and supports a competitive advantage.

Before COVID, destination marketing and development tended to be supply-driven and too focused on economic indicators that didn't necessarily signal whether a community was thriving. Global instability and a renewed commitment to sustainable travel has returned the focus to making sure that tourism provides more holistic benefits to the community.

Modern destination marketing and development strategy, grounded in the principles and ideas of Community Economic Development (CED), offers destination managers and tourism professionals new solutions that fall perfectly in line with the call for greater community leadership, and multiple bottom-line solutions that improve local well-being. This methodology is market-driven but also applies local economy solutions, knowing that a diversity of small and community-powered projects can also drive or support domestic and international visitor arrivals.

The New Destination Management Principles

- Aim to Thrive. Don't let growth become a goal in itself. Thrive, and grow. Embrace the 21st century goal of community well-being. Meet the needs of your local destination within the means of the planet.
- Nurture Human Nature. Promote diversity, participation, collaboration and reciprocity. Take a livelihoods focus that considers a range of tourism-related opportunities from formal to informal. Empower community 'connectors' and informal networks that can lead and get results.
- Favour Local Economy Solutions. Modern place-making requires local economy solutions that foster self-reliance, resilience and connectors that can improve everyone's operations at scale. A focus on locally owned businesses can eliminate poverty and increase per capita income. A diversity of small economic development projects can be deeper and longer lasting for the local economy.
- Be Distributive and Regenerative by Design. Thriving economies are diverse and favour distribution. They are also regenerative, choosing to be circular and to put back what they take.

Using these principles and the new tools and solutions they provide, this report is able to present deeper strategic insights and use these, to make stronger recommendations.

3. Destination Profile

The Shuswap is in the centre of BC and sees over 4 million travellers directly through the region on the Trans-Canada Hwy and Hwy 97B, almost equidistant from Calgary and Vancouver. This offers a tremendous opportunity to engage with tourists that may be travelling to either destination.

In addition to attracting region-specific visitation, the Shuswap is also located within the larger Thompson Okanagan Tourism region and sees increased visitation because of interest and associated spillover from communities in both the Okanagan and Thompson subregions.

A full 83% of the 924,270 domestic visitors in 2018 came from BC and Alberta, and Shuswap Tourism's optimum Pacific Northwest U.S. market, per 2018 data, is estimated to be 750,000[1].

[1] All data in this section from Shuswap District Community Research, Visitation Summary, 2018-2020.

Fast forward, 2020 metrics and visitor data have shown unpredictable travel trends that have been skewed immensely because of the COVID-19 pandemic. Telus insights data available to Shuswap Tourism through the TOTA Community Research Program show that 2019 saw an increase in international visitation across all four (4) seasons compared to 2018. Domestic travel was up by 32% and 42% for summer and fall respectively over 2018 numbers but was down 18% in spring 2019 compared to spring 2018. Winter visitation in 2019 compared to 2018 was down just 2%.

The majority of domestic visitors continue to come from Western Canada, with BC and Alberta making up the vast majority. Domestic visitation from BC residents peaked in August 2019 at 81,650. Domestic visitation from Alberta also peaked in July 2019 at 78,690. The region is also seeing significantly more visitation from both the Yukon and the Northwest Territories across all seasons. The U.S. remains the strongest international market, followed by China, South Korea, Australia, and Mexico.

4. Community Engagement and Research Methods

Great destinations are always place-based. The business of tourism always operates in rich locations of culture, environment, and people. Because community identity always plays a critical role in fostering authentic local development processes, destination marketing and development should always seek out diverse opinions and inclusive points of view. Being more than just market-driven, great plans that spark important change invariably respect community identity and work to conserve and protect the local assets that make the community livable and worth visiting in the first place.

Well-rounded insights are required so destinations can plan for the future and fully consider the social, economic, cultural, and environmental risks and opportunities. For this Shuswap Tourism work, the main research and engagement objectives were:

- Identify source(s) of 'sustained' competitive advantage that will see the Shuswap community thrive and grow
- Underline destination assets, strengths and opportunities that should be leveraged or improved on
- Uncover local economy tourism solutions that improve Shuswap community and destination well-being
- Surface opportunities to improve destination marketing that will deliver scale, efficiencies, reach and market power

Engagement method targets were met and in important cases exceeded. An initial on-site visit in the region created the foundation for solid connections throughout

the research and engagement phase. For example, participants in the on-site interviews were incredibly responsive, with the number of target interviews easily met. Attendance at Shuswap Tourism Advisory Committee meetings and Destination Brand Audit workshop saw great turnout and stakeholder engagement.

Figure 01. Community Engagement Highlights

SURVEY 61 responses

FACEBOOK GROUP 35 members

SHUSWAP DESTINATION BRAND AUDIT 11 participants

TOURISM ADVISORY COMMITTEE WORKSHOP 17 attendees

2 STAKEHOLDER FOCUS GROUPS WITH 13 attendees

IN DEPTH STAKEHOLDER INTERVIEWS 15

PRIMARY DATA POINTS +5,000

The process required the active participation of diverse stakeholders throughout the region (see **Appendix B**).

Indigenous Engagement

A holistic tourism strategy and plan would not be complete without Economic Reconciliation in mind that's focused on intentful inclusion of First Nations partnerships. Concrete actions that generate measurable outcomes for neighbouring Indigenous or entrepreneur-owned tourism businesses should be taken.

The Shuswap region community lives, works, and plays on the ancestral territory of the Secwépemc. Over the course of this planning project, outreach has focused on engaging with Indigenous Tourism BC (ITBC) directly with further plans to engage the Secwépemc First Nations members.

Economic Reconciliation plans are ongoing and will remain open and flexible to the cultural needs and values of Indigenous partners (see **Foster the Secwépemc Indigenous Economy** focus in **Section 10**).

Research Methods

A mixed methods approach was adopted with primary data collection being the most important source of strategic insights. Community engagement, field work, and data collection happened from August - December, 2023.

Relying on different techniques to ask similar lines of enquiry not only strengthens the reliability and validity of results, but it also cuts risk should any single method not deliver meaningfully.

Figure 02. Destination Marketing and Development Research Phases

The research methodology followed a phased approach. The three key phases are illustrated above. After collection, data was clustered and themed to ensure that representation was provided, and that each insight was given weight.

A detailed summary of each research and engagement method can be found in **Appendix C** through **Appendix G**.

5. Key Findings

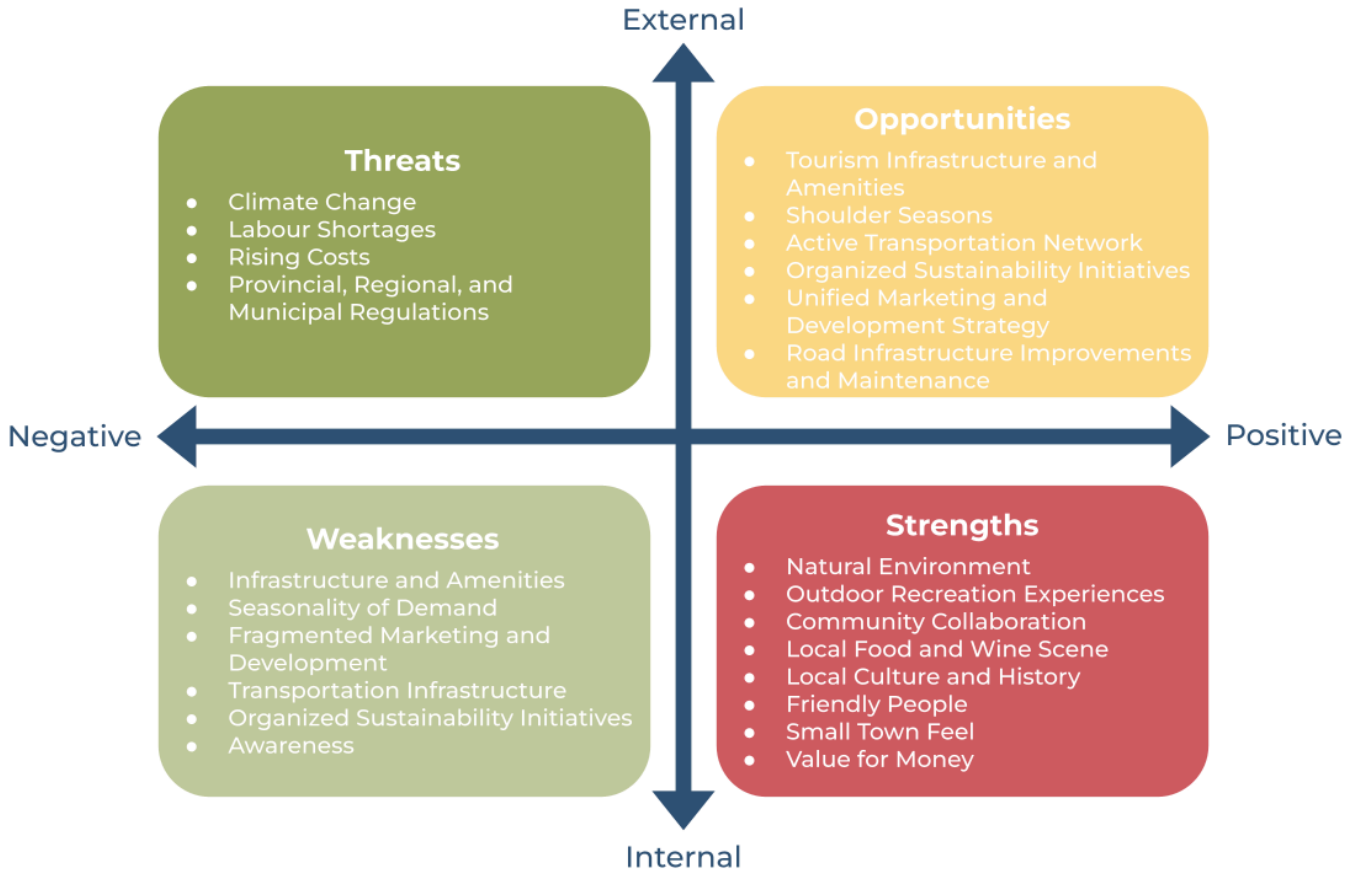
Analysis and feedback results were triangulated to look at the story the data was telling. Using a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) as a framework to tell the overarching story, the main findings were:

> Strengths: Natural environment; outdoor recreation experiences; community collaboration; local food and wine scene; local culture and history; friendly people; small town feel; value for money.
>
> Weaknesses: Infrastructure and amenities; seasonality of demand; fragmented marketing and development; transportation infrastructure; organized sustainability initiatives; awareness.
>
> Opportunities: Tourism infrastructure and amenities; shoulder seasons; active transportation network; organized sustainability initiatives; unified marketing

and development strategy; road infrastructure improvements and maintenance.

Threats: Climate change; labour shortages; rising costs; provincial, regional, and municipal regulations.

Figure 03. Shuswap Tourism Destination Marketing & Development SWOT Analysis



Destination Strengths

Natural Environment: The region's natural beauty, including the lake and scenic trails, serves as a primary attraction and industry's economic bedrock. This synergy between tourism and the natural environment positions the Shuswap region as a premier destination, offering both economic and cultural benefits through the preservation and promotion of its natural assets.

Outdoor Recreation Experiences: The Shuswap region's tourism industry is distinguished by its diverse year-round outdoor recreation, including activities like hiking, swimming, and snowmobiling. Stakeholders acknowledge the community's success in providing access to nature through well-maintained trails. This commitment to outdoor experiences serves as a unique selling point, particularly in

comparison to its competitors. The region particularly excels in spring and summer offerings, featuring unique activities like horseback riding, whitewater rafting, and a waterpark. This emphasis on outdoor recreation, combined with strengths in leisure and arts and culture tourism, solidifies the Shuswap region's appeal.

Community Collaboration: The Shuswap region's tourism industry benefits from having a strong sense of community with a collaborative atmosphere. Tourism businesses prioritize collaboration over competition which presents the region with the capacity to offer holistic and unified tourism experiences. Stakeholders, including municipalities, DMOs, businesses, non-profits, community champions, and the Indigenous community, are united on building a collaborative, competitive, and sustainable tourism strategy.

Local Food and Wine Scene: The table has been set with passionate, talented Chefs, Winemakers, Brewmasters, Cideries, and small quality farmers. This is a rare and perfect fit for the growing trends in food tourism. Collaborating between producer, grower, venues, and restaurants would provide a unique and significant destination advantage. As a region, these authentic and quality offerings combined would elevate the region's competitive advantage attracting travellers who are aligned with the values that are reflective of the residents and locally owned businesses in the Shuswap region.

Local Culture and History: The region stands out with unique selling points that include a vibrant lake-life culture, music and cultural events, and a commitment to showcasing local heritage and cultural experiences for visitors.

Friendly People: The Shuswap region's tourism industry thrives on the genuine friendliness of its community. Visitors recognize the welcoming nature of the Shuswap region, with some choosing to make it their home after experiencing its hospitality. This sentiment is reinforced by stakeholders, underscoring the positive impact of the region's friendly residents on business. The authentic warmth of the local population emerges as a valuable asset, enhancing the Shuswap region's appeal as both a tourist destination and a desirable place to live.

Small Town Feel: A charming small-town atmosphere is a main appeal, and residents emphasize the importance of preserving its intimate and welcoming ambiance. The cultivation and promotion of this small-town vibe will play an increasing role in shaping the destination's success, and local community energy should be harnessed to protect it.

Destination Weaknesses

Underpriced in a Late Growth Market: Tourism products within the Shuswap region offer a diverse range of visitor value. Notably, the majority of Shuswap tourism products analyzed provide strong Value for Money meaning they are performing at

high standards but could be dangerously underpriced at a time when input costs are soaring and margins are being squeezed from all sides. This focus on volume at discount prices in an over-served family traveller segment should not be the dominant segmentation and pricing strategy for a destination whose brand promise is strong enough to command price premiums. Overcoming this trap will require destination managers to push local tourism-related businesses to offer a stronger experience and set higher prices, which will help the destination become more competitive and operators more financially stable and resilient to the future market shocks which are sure to come.

Tourism Infrastructure and Amenities: Visitors complain about limited accommodation options, inadequate lake access, and missing amenities like wayfinding and bike rentals. The region also contends with overloading existing infrastructure, contributing to social and ecological risks. In comparison to competitors, the Shuswap region lacks developed tourism offerings, such as resorts and guided tours.

Seasonality of Demand: The Shuswap region's tourism industry experiences seasonal fluctuations in demand, resulting in limited operating hours and experiences outside of peak seasons. Notably, the region performs weaker than its competitors when it comes to fall and winter tourism offerings, lacking diverse experiences like ice skating, fat biking, catskiing, heli skiing, and dog sledding. Seasonal fluctuations in demand primarily impact local businesses and the tourism labourforce, making year-round operation and employment difficult.

Fragmented Marketing and Development: The Shuswap region's tourism industry grapples with a fragmented marketing and development approach. Inconsistencies in tourism offerings and the independent marketing of the various subregions contributes to a disjointed tourism approach. Stakeholders highlighted concerns about the dilution of Shuswap Tourism's message and the missed opportunity to capitalize on the community's collaborative nature.

Transportation Infrastructure: Data and feedback show a lack of adequate lake access, an inadequate active transport network, and poor road systems. The overall impact of poor transportation infrastructure underscores the need for improvements to enhance accessibility and visitor satisfaction.

Organized Sustainability Initiatives: A significant majority of tourism-related businesses lack any sustainability awards or certifications, with only a quarter measuring or reporting on sustainability indicators. This absence of organized efforts extends to diversity, equity, and inclusion (DEI) initiatives as well. The impact of tourism on the local ecosystem is evident, including the introduction of invasive species, overtourism, land and water damage, improper waste management, and disruption to wildlife.

Destination Opportunities

Tourism Infrastructure and Amenities: Attracting new investment holds the potential to bring sorely needed accommodation capacity to the region. Supporting amenities like public restrooms, visitor information centres, and taxi services are also needed.

Economic Dispersion: Building out tourism offerings in Armstrong and Spallumcheen, Enderby, Chase, and Falkland, presents a promising opportunity for overall tourism development in the Shuswap region. Long term plans to spread tourism benefits more evenly across the region are both redistributive and regenerative all at the same time.

Shoulder Seasons: A focused and coordinated approach to build out shoulder-seasons is probably the strong sustainability move that the region could make. Repositioning the region as THE place to visit in the fall and spring, coupled with concentrated experience development efforts will improve industry profitability, resilience, staffing, and affordability, while making sure tourism development improves community well-being.

Active Transportation Network: Expanding existing bike lanes, improving lake access with more docks, more bike and boat rental services are key. Another prospect lies in upgrading and building out existing biking and hiking trail systems.

Organized Sustainability Initiatives: Adopting a sustainability framework with goals that are tailored to the region and performance indicators that are scaled and trackable will give the Shuswap region a focus to rally behind and the means to continuously improve.

Unified Marketing and Development Strategy: The Shuswap tourism industry has a significant opportunity to forge a unified marketing and development strategy across participating regions. The key opportunity lies in developing a cohesive marketing approach, encompassing brand consolidation, alignment on market segmentation and positioning, and forming robust partnerships and packages across tourism stakeholders. Seizing this opportunity is crucial for promoting a unified and impactful tourism presence in the Shuswap region.

Road Infrastructure Improvements and Maintenance: Harness the region's strong collective voice and direct it towards making sure roads are accessible and safe. Shuswap region destination managers should have a clear and immediate understanding of their transportation infrastructure needs and these should be communicated regularly to responsible government departments and officials.

Destination Threats

Climate Change: Stakeholders expressed deep and widespread concerns about the potential impacts of climate change - wildfires, declining water quality and supply, etc. Emergency preparedness and crisis response will be critical disciplines to master if the destination hopes to collaboratively build up its resilience and mitigate business disruptions.

Labour Shortages: Workers are unable to afford living in the area or sustain year-round employment due to the seasonality of tourism demand. This limitation poses a potential hindrance to the growth and sustainability of the Shuswap region's tourism industry, emphasizing the need for strategic solutions to address labour-related challenges.

Rising Costs: The cost of living is going up and social impacts are growing in severity. Housing emerges as a paramount challenge, with homelessness becoming a prominent issue due to the scarcity of affordable and rental housing inventory. This challenge compounds staffing issues, as tourism workers find it difficult to afford living in the area or maintain year-round employment due to the seasonality of tourism demand.

Provincial, Regional, and Municipal Regulations: Tourism businesses require certainty when making important capital investments in their business and setting operating schedules that become part of the promise made to visitors. Unclear rules, inconsistencies in their application, poor communication, or significant delays can derail operators' plans and discourage future investment threatening the local economy and government tax income.

6. Competitive Analysis & Sources of Advantage

Understanding the forces shaping the Shuswap region's competitive position offers important insights and clues that can be used to grow market share at the expense of competitors, or at least to set stretch goals in pursuit of a market leader.

With summer and winter presenting limited growth options, marketing in the fall and spring presents the Shuswap region with an opportunity to harness its collaborative marketing power in order to more strongly differentiate itself and perhaps take second and even first position from the usual suspects and new competitors like Golden and Nelson.

See **Appendix H** for detailed findings and additional context.

Key Insights

- As a multiseason destination that banks on lakeside lifestyle as a primary tourism experience, the Shuswap region competes with Vernon, Revelstoke, Golden, and Nelson.
- Like its competitors, the Shuswap region is marketed as a four-season destination targeted towards families and groups interested in recreation and leisure, adventure, arts and culture, or unique dining experiences. Unlike its competitors, however, Shuswap Tourism is not currently marketing towards the MICE industry, sports tourism, nightlife, luxury, or accessible travel.
- The Shuswap region's unique selling points include the lake, outdoor summer recreation, houseboats, cultural events, and local food and drink experiences.
- Although the Shuswap region's offerings are comparable to its competitors, they may not be as developed or robust for tourism. The Shuswap region also suffers from a fragmented marketing strategy. Other weaknesses include seasonality, poor transportation infrastructure, and limited market visibility.
- The Shuswap region falls in the middle of the pack when it comes to overall product offerings. More specifically, the region performs stronger than its competitive set when it comes to spring / summer offerings but the weakest in the fall / winter. Additionally, the Shuswap region scored the highest on leisure and arts and culture tourism offerings but fell behind on recreation and adventure.
- Tourism products within the Shuswap region compete in every visitor value category. Nobtaly, however, the majority of tourism products in the Shuswap region fall to the right of the performance index, providing strong "Value for Money".

High-Value Destination Development and Marketing Opportunities

The competitive analysis reveals that the Shuswap region has an opportunity to capitalize on its natural assets through the development of more organized outdoor recreation and adventure experiences, especially for the spring and fall shoulder seasons. General leisure activities as well as arts and culture are an advantage that should be front and centre in shoulder-season communications, especially to shore up the region's product position in the fall.

7. Destination Experience Analysis

Tourism asset mapping, product breadth and depth, and price-value analysis offer a well-rounded consideration of the destination experience, and reveal unique opportunities for building out strengths across the region, improving the visitor experience, and claiming an experiential advantage that will drive destination brand fame and increase tourism operator profits.

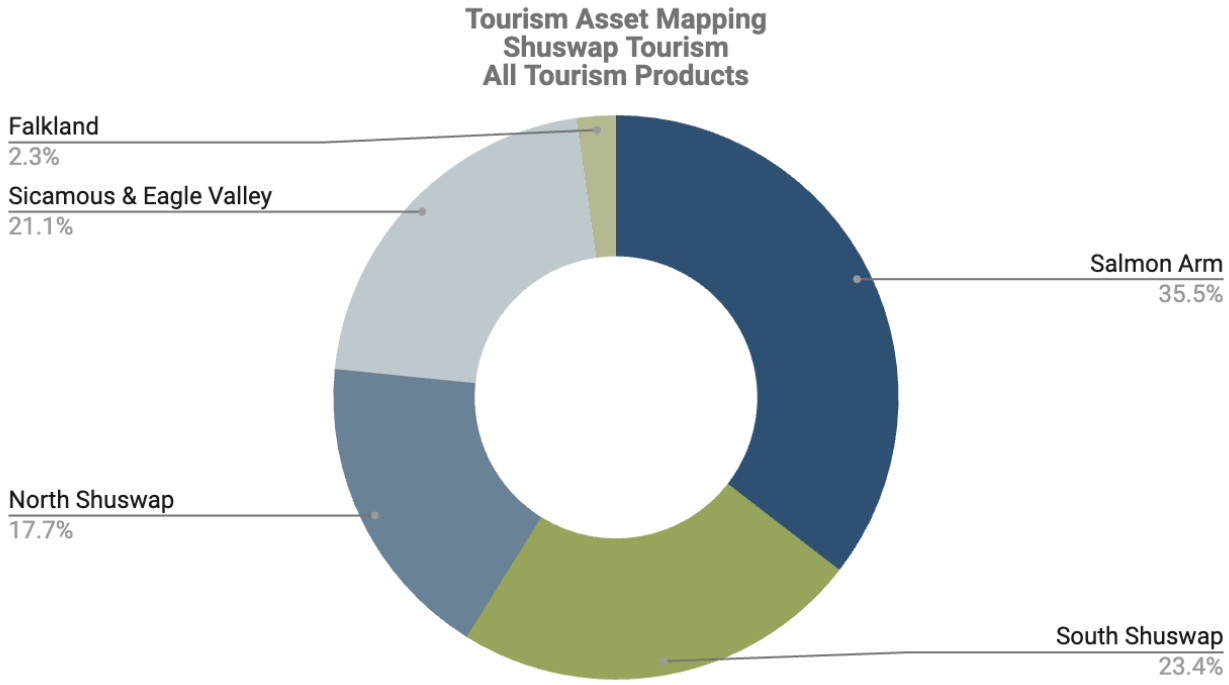
Tourism Asset Mapping

While only 2.3% of the region's tourism products are in Falkland, the rest are distributed among Salmon Arm (35.5%), South Shuswap (23.4%), Sicamous and Eagle Valley (21.1%), and North Shuswap (17.7%) respectively. This distribution varies, however, when reviewing specific tourism products such as accommodations, dining, and experiences.

Encouraging product dispersion is key to building a tourism economy that distributes gains and impacts more evenly across invested communities. Overall, there appears to be a need to build out tourism offerings within the Falkland subregion.

See **Appendix I** for detailed findings and additional context.

Table 01. Shuswap Tourism Asset Mapping - All Tourism Products



Product Depth & Breadth

The Shuswap region has an opportunity to capitalize on its natural assets through the development of more organized outdoor recreation and adventure experiences, especially for the fall and winter season.

General leisure activities as well as arts and culture are an advantage that should be front and centre in shoulder-season communications, especially to shore up the region's product position in the fall.

See **Appendix I** for detailed findings and additional context.

Key Insights

- The Shuswap region has something to offer in every season, but compared to similar nearby destinations, Shuswap falls in the middle of the pack.
- The strongest season is spring / summer (scoring the highest tourism offering index across the competitive set) but the Shuswap region has the lowest tourism offering index in fall / winter season compared to competitors.
- Leisure and arts and culture tourism offerings score highest but the Shuswap region sits around the middle of the pack on recreation and adventure offerings.

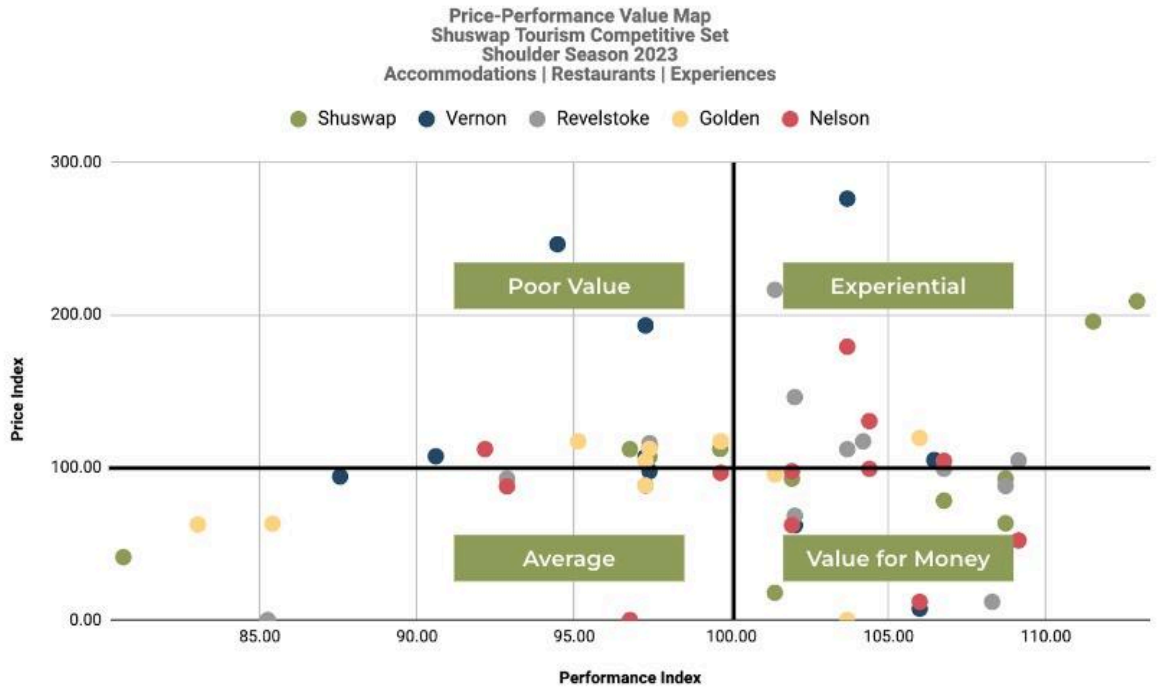
Competitor Price-Performance Analysis

Visitors don't make their travel purchase decisions based on price alone. Far from it. The experience and other benefits, which are often difficult to quantify, create value.

For the purposes of this report, this price-performance analysis compared the Shuswap region with competitors Vernon, Revelstoke, Golden, and Nelson in the following categories:

- Accommodations
- Restaurants
- Experiences

Table 02. Price-Performance Value Map: Shuswap Region Competitive Set (2023)



See **Appendix I** for detailed findings and additional context.

Key Insights

- Tourism products within the Shuswap region offer a diverse range of visitor value. Notably, the majority of Shuswap region tourism products analyzed provide strong *Value for Money* meaning they are performing at high standards but could be dangerously underpriced at a time when input costs are soaring and margins are being squeezed from all sides.
- The goal is always to land in the coveted *Experiential* arena that allows operators to charge premium prices while still earning high customer praise. Service culture training, experience improvements, and yield pricing are key tactics in pushing local businesses into this space.
- Similar to the Shuswap region, tourism products from across the competitive set fall under various categories of visitor value.
- Golden and Vernon businesses seem to have their work cut out for them with too many offering poor to average value.
- Nelson and the Shuswap region are providing value for the money at least, but should envy the quality of the Revelstoke experience and the greater net margins that come with. In fact, with less effort, Revelstoke could make a clean sweep of the Experiential market.

8. Destination Growth Analysis

At any point in time, a destination has an existing pool of current and prospective visitors who make up current market demand and a potential pool of prospective visitors who provide the opportunity to grow market demand. Understanding your destination's ceiling for growth is not only of great strategic importance, it is also essential to making sure that growth doesn't surpass levels that the local environment, community, and businesses can support.

Calculating a Market Development Index (MDI) helps destination managers understand the evolution of a market or product sectors, and to measure its potential for future growth. By looking at the destination's current market demand in relation to its market potential, destination managers are offered important signals that can tell them when to invest or more importantly, when not to.

Projecting a destination's future market share is complex, and outside of large DMOs with sizable market research budgets and professional teams at the ready, most DMOs never attempt it. But using simple marketing logic, we can develop a reasonable estimate. Using the destination marketing mix (ie. promotion x product x price x place x service), we can set a share development path that asks potential visitors (or failing that, asks local destination players themselves) to rate a destination's performance along this sequence of market share metrics. Measuring current performance against a desired level of response provides a Share Development Index (SDI) that can tell us what marketing mix strategies are needed to realize the share growth we want.

See **Appendix J** for complete method and analysis.

Table 03. Shuswap Region Destination Growth Potential

Key Insights

- The Shuswap region's destination growth potential and future competitiveness rests on the development of its shoulder-season hiking, culinary, culture, biking, and birding experiences.
- Compression in the local accommodation sector, elevated climate-related risks, water shortages, and intense pressure on local resources suggest that future investments in the summer lakeside lifestyle would only yield diminishing returns. Market-based management principles dictate that the Shuswap region could dramatically reduce its marketing and destination development investments focused on building summer demand, and if high season operators matched that move with price increases, then higher margins, lower compression, and more sustainable tourism would result.
- A popular idea that could alleviate this compression is building more public boat dock infrastructure to spread the tourism base around to less busy, less explored arms of the lake. The proposition is certainly attractive to tourism-related businesses in Scotch Creek and Sunnybrae, for example. Success would ease boat and houseboat congestion on the lake, and most likely, spark private-sector investments in sorely needed accommodations.

9. A Destination Vision Focused on Well-Being

The economic foundations of destination management need to change. The most important being the need for a more evolved definition of growth. Progress can no longer be endless growth. The future will ask us to “create economies that make us thrive, whether or not they grow” (Raworth, 2017).

Imagining a future that everyone wants to work towards is the most important work of destination planning. It asks us to shift attention to what is possible and to suspend any reservations we might have that are grounded in the challenges and limitations of today.

Using an experiential sensory exercise, Shuswap Tourism stakeholders were asked to travel to the future and list what they considered evidence that the Shuswap region had realized its full potential as a sustainable destination. This method focused more on positive, emotionally motivated outcomes, rather than wordsmithing a lowest-common denominator community vision into a single paragraph.

Figure 04. Community Vision for Well-Being

Source: Shuswap Tourism Advisory Committee Workshop, 2023

Turning this new destination vision of well-being into a concrete goal(s) requires a new framework for measuring community well-being. The New Economics Foundation has distilled community well-being down to five (5) simple acts. Besides being more holistic, these measures also fall much more in line with Indigenous worldviews.

Organizing workshop visioning feedback into one of these five simple acts, shows that experiencing joyful moments, connecting to people, taking notice of the world and prospering businesses and communities are the most important and relevant factors contributing to community well-being.[2]

Translating the community's vision into a single goal is challenging, especially with so many different opinions about what future well-being within the community ultimately might look like.

Since the Shuswap region's vision is ultimately about community well-being, the work is made easier when we consider the main goal as improving community well-being over time. From here, the only thing missing from this goal is a measure that will signal to the community that well-being is being improved (or not improved) over time. Here, continuous improvement is key.

By 2028, Improve Community Well-Being in the Shuswap by Continuously Working to Increase the Region's Tourism Quality of Life (TQOL) Index Score

With the understanding that progress can no longer be measured in terms of growth, measuring whether or not we are reaching our destination goals focused on well-being then becomes a matter of generating the "right" signals.

[2] See Appendix G for detailed method

Table 04. Shuswap Region Destination Vision - Goals, Measures and Targets

Destination Vision for Well-Being	Community Ranking	Goal	Measure	2025 Target
Experiencing Joyful Moments	1	Living, working and playing in the Shuswap region makes people happy	TQOL Index	Baseline
Connecting to the People Around Us	2	The Shuswap region has a strong sense of community	TQOL Index	Baseline
Taking Notice of the World	3	People are mindful, self-aware, present, unplugged, thoughtful, and curious.	TQOL Index	Baseline

Source: Shuswap Tourism Advisory Committee Workshop, 2023 | New Economics Foundation, 2008

After a comprehensive literature review of tourism and non-tourism well-being and quality of life indexes, Travel Local's research team recommends that destinations use the rigorously developed and tested Tourism and Quality of Life Index (TQOL). With 38 validated QOL indicators, the TQOL instrument not only captures residents' quality of life satisfaction but also the extent to which tourism is perceived to influence this assessment. These insights can help identify the role that tourism plays towards QOL within the destination as well as areas of focus for sustainable development.

10. Destination Development and Marketing Focus

Together, the strategic lenses, principles, and insights presented so far tell a rich story. Based on this strategic narrative, the following destination marketing and development focus and supporting key initiatives will continuously improve community well-being in the Shuswap region.

A total of six (6) areas of focus have been put forward:

1. Build a More Redistributive, Resilient Local Economy
2. Make the Shuswap More Competitive
3. Flex the Full Strength of Our Experience
4. Share the Best Bites of the Shuswap
5. Foster the Secwépemc Indigenous Economy
6. Empower People to Achieve

The main strategy and key initiatives for each are summarized below. Suggested milestones and estimated costs for each key initiative are detailed in supporting tables to help set short-, medium-, and longer-term planning priorities.

1. Build a More Redistributive, Resilient Local Economy

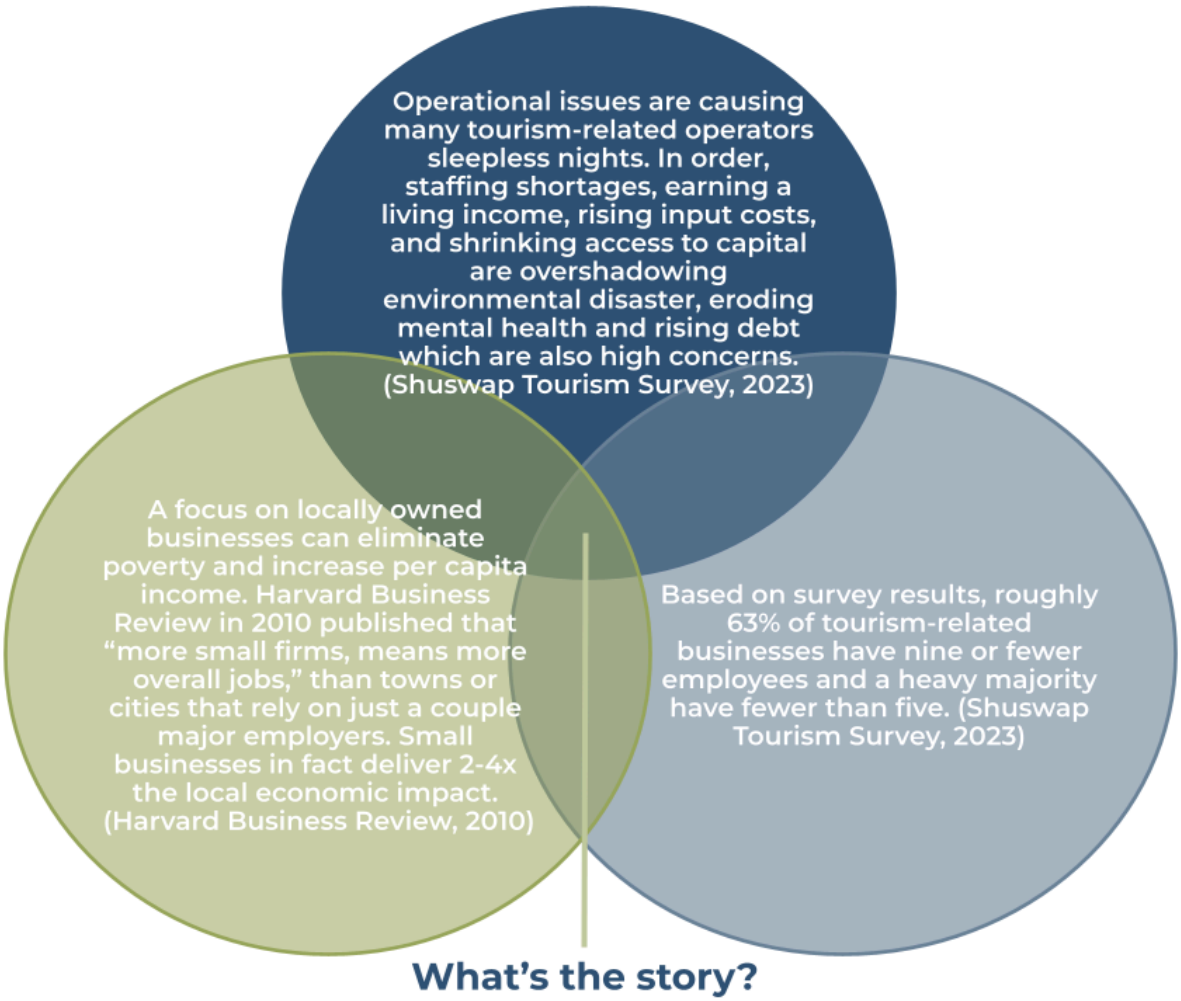
Over the last 20 years, focused tourism product development has all but disappeared across Canada. Supply research, sector analysis and well funded product clubs designed to incubate new ideas, fell to broad one-size fits all small business guides and toolkits. DMO funding was being slashed and what was left was pushed almost entirely into marketing. Funding new tourism startups and business growth wasn't the focus and was left entirely (almost) to the invisible hand of the market.

A focus on locally owned businesses can eliminate poverty and increase per capita income. Harvard Business Review in 2010 published that "more small firms, means more overall jobs," than towns or cities that rely on just a couple major employers. Small businesses in fact deliver 2-4x the local economic impact.

Based on Shuswap survey results, roughly 63% of tourism-related businesses have nine (9) or fewer employees. A heavy majority have fewer than five (5). Operational issues are causing many tourism-related operators sleepless nights. In order, staffing shortages, earning a living income, rising input costs, and shrinking access to capital are overshadowing environmental disaster, eroding mental health and rising debt which are also high concerns.[3]

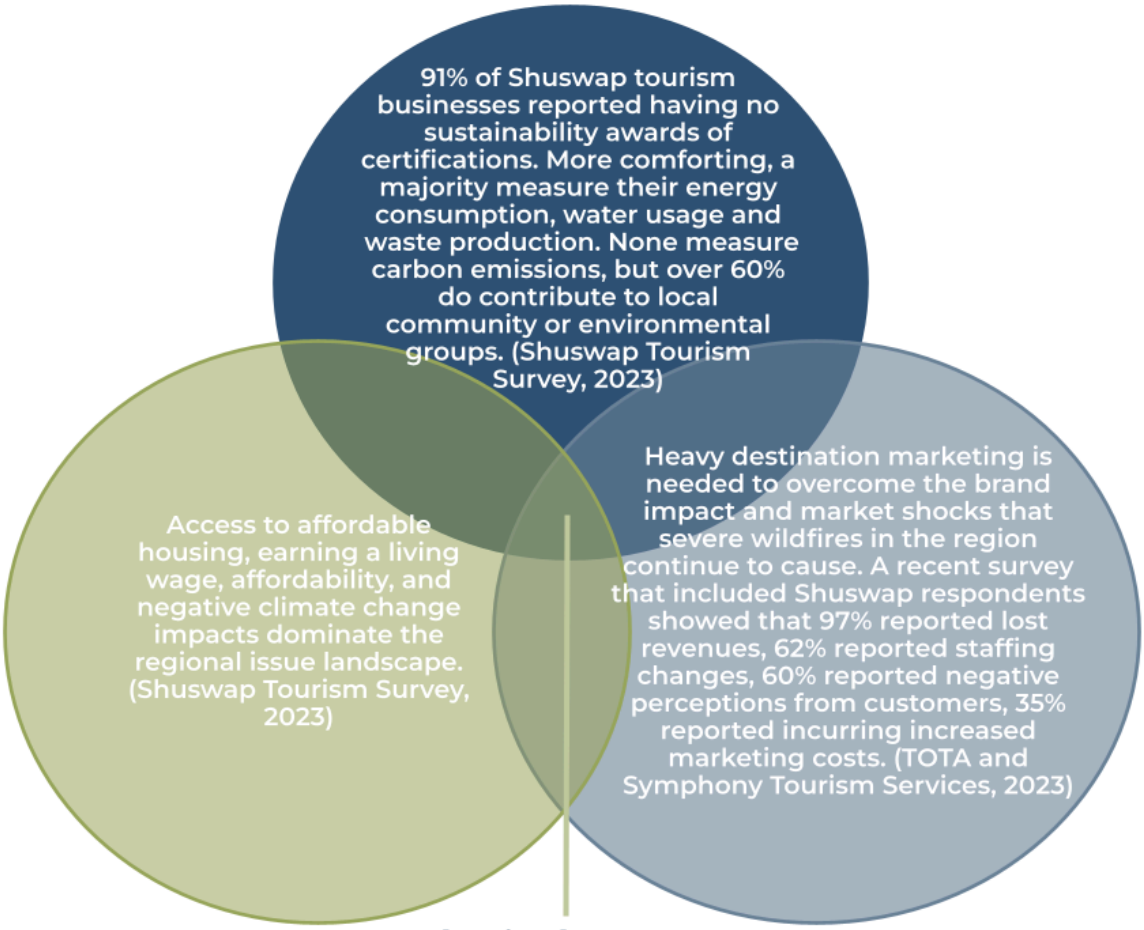
[3] Shuswap Tourism Survey, 2023

Strategic Insights



What's the story?

There's strength in numbers, so local businesses should band together, find common needs, and use their newfound market power to re-negotiate with suppliers, buy local in bulk, cut procurement costs, and more. Destination management organizations can be important connectors in this work by offering coordination support, grant writing, and scaled efficiencies like technology platforms that deliver common value while cutting costs.



What's the story?

In addition to their financial position, there exists an opportunity to benchmark and improve Shuswap business social performance with respect to workers, stakeholders and the environment.

Managing a triple-bottom line also requires businesses to proactively address impacts to the operating environment such as drought, extreme heat, toxic air quality, and forest fires.

Fortunately for the Shuswap region, TOTA, and Destination BC are providing strong leadership and making critical tools available to prepare, coordinate, and respond to natural disasters and resulting business interruptions.

Strategy

Improve profitability of locally owned businesses by bringing together Shuswap tourism-related business operators to pursue scale efficiencies to ensure businesses continue to generate outsized local impacts.

Overview of Key Initiatives

- Seek out opportunities to cut operating costs for local businesses and offer profitability training
- Adopt programs to better encourage and measure positive social impact (ie. TOTA Biosphere Certification)
- Provide support for recruitment of key talent and staff
- Partner to build a Shuswap Buy Local program
- Plan for business interruption, crisis communications, and response planning

Table 05. Build a More Redistributive, Resilient Local Economy

Build a More Redistributive, Resilient, Local Economy
Improve profitability of locally owned businesses by bringing together Shuswap tourism-related business operators to pursue scale efficiencies to ensure businesses continue to generate outsized local impacts.

Key Initiative	Start	Resource(s)
1. Seek out opportunities to cut operating costs for local businesses and offer profitability training so operators understand how they can cut volume while increasing profits	2025	Yield Management Training
2. Adopt and implement a program that increases the number of businesses who are measuring, benchmarking and improving their social performance with respect to workers, stakeholders and the environment (ie. TOTA Biosphere Certification)	2025	Partner with TOTA
3. Provide support for recruitment of key talent and staff	2025	Funding, Program Support
4. Partner to build a Shuswap Buy Local program	2026	Funding, Program Support
5. Plan for business interruption, crisis communications, and response planning	2024	Funding
6. Engage private-sector business facilitator to work on a cash and performance basis to uncover and leverage opportunities to cut local business operating costs	2025	$10K Business plan and startup

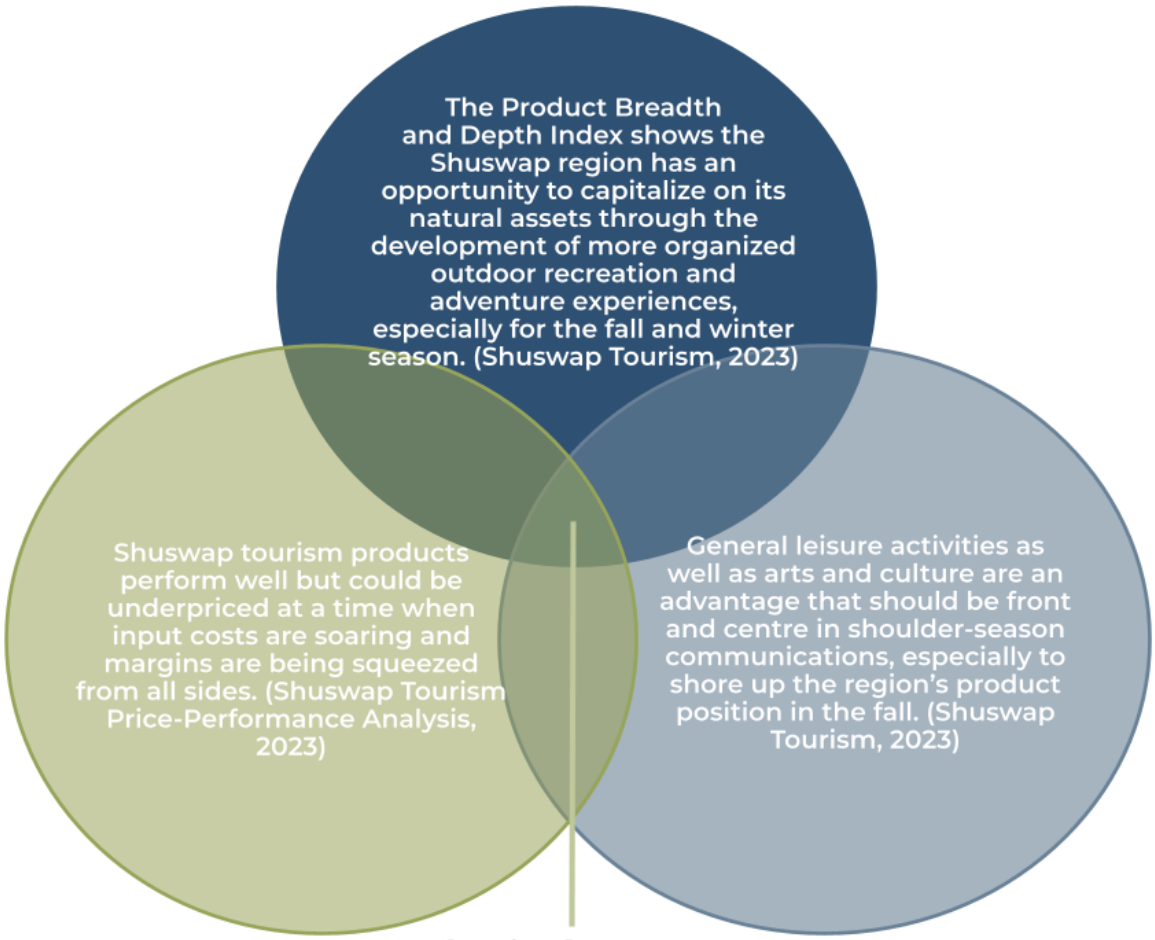
2. Make the Shuswap More Competitive

With summer and winter presenting limited growth options in a field marked by highly differentiated competitors with aggressive collaborative marketing programs, marketing in the fall and spring presents the Shuswap region with an opportunity to make its own move to the front of the pack. By harnessing its own collaborative marketing power in order to more strongly differentiate itself, the Shuswap region could perhaps take second and even first position from the usual suspects and competitors like Golden and Nelson, who have been underestimated for far too long.

If the Shuswap region is going to make bold moves in the shoulder-season, destination managers and local businesses will need to make some changes. Notably, the majority of Shuswap tourism products analyzed provide strong "Value for Money" meaning they are performing at high standards but could be dangerously underpriced at a time when input costs are soaring and margins are being squeezed from all sides. The goal is always to land in the coveted Experiential arena that allows operators to charge premium prices while still earning high customer praise. Service culture training, experience improvements, and yield pricing are key tactics in pushing local businesses into this space.

The Shuswap region has an opportunity to capitalize on its natural assets through the development of more organized outdoor recreation and adventure experiences, especially for the fall and spring seasons. General leisure activities as well as arts and culture are an advantage that should be front and centre in shoulder-season communications, especially to shore up the region's product position in shoulder-seasons.

Strategic Insights



What's the story?

With summer and winter presenting limited growth options in a field marked by highly differentiated competitors with aggressive collaborative marketing programs, marketing in the fall and spring presents the Shuswap region with an opportunity to make its own move to the front of the pack.

By harnessing its own collaborative marketing power in order to more strongly differentiate itself, the Shuswap region could perhaps take second and even first position from the usual suspects and competitors like Golden and Nelson, who have been underestimated as rivals.

The goal is always to land in the coveted Experiential arena that allows operators to charge premium prices while still earning high customer praise. Service culture training, experience improvements, and yield pricing are key tactics in pushing local businesses into this space.

Strategy

Strengthen destination position by satisfying market-demand for an enhanced breadth and depth of Shuswap region experiences in the spring and fall so that the region claims a clear advantage over competitors.

Overview of Key Initiatives

- Mentor, coach, and encourage the next generation of tourism related-business owners
- Offer service culture training, experience improvements, and yield pricing to push local tourism-related businesses to deliver more experiential value
- Develop an Experience Co-op social[4] enterprise business model to capitalize on natural assets through the development of more organized outdoor recreation and adventure experiences

Table 06. Make the Shuswap More Competitive

Make the Shuswap More Competitive Strengthen destination position by satisfying market-demand for an enhanced breadth and depth of Shuswap region experiences in the spring and fall so that the region claims a clear advantage over competitors.		
Key Initiative	**Start**	**Resource(s)**
1. Mentor, coach, and encourage the next generation of tourism related-business owners by working with local business accelerators	2025	Partnership
2. Offer service culture training, experience improvements and yield pricing to push local tourism-related businesses to deliver more experiential value	2025	Partnership, Training
3. Develop an Experience Co-op social enterprise business model to capitalize on natural assets through the development of more organized outdoor recreation and adventure experiences	2025	Business Plan, Funding

[4] As part of their Destination Development planning, Grande Cache in Alberta is considering a social enterprise model to deliver a greater range of experiences in the area. Calling it the *Grande Cache Experience Co-op*, regional tourism planners are working with local societies, hobbyists, and adventurers on the delivery of tourism experiences that can be packaged with overnight stays. The social enterprise would provide the business structure and contract out delivery to locals who have an interest in leading seasonal tours like hiking, wildlife viewing, or foraging.

3. Flex the Full Strength of Our Experience

Regional destination marketing experts admit that regional collaboration could be better. When asked what they do well, answers centred on individual strengths and isolated tactics. On average, they rated their own performance in working together as moderate. Meeting at set times of the year to make joint plans and resource allocations, celebrating each other's successes, building up a local pool of local research and data, creating content together, focused marketing co-op campaign, inviting leadership that creates a climate for success, empowering the community to act, and finding scale efficiencies to cut costs and increase market power are all key areas of opportunity. The good news is that nearly all regional partners are up to the task.

The Shuswap region needs a refreshed market segmentation strategy. Collectively, the region rarely focuses marketing campaigns on specific target segments. Marketing briefs should always identify the target segment, including their fundamental attitudes, tastes and preferences, behaviours and channel preferences. Digital is the great equalizer and the Shuswap region has access to the same digital tools and suppliers as their biggest competitors. This provides an opportunity to customize, test, and optimize the performance of everything from marketing creative to channel selection.

Social values provide depth and context to the community identity feedback. Using Destination Canada's Explorer Quotient (EQ)© we can go beyond traditional market research of defining people.

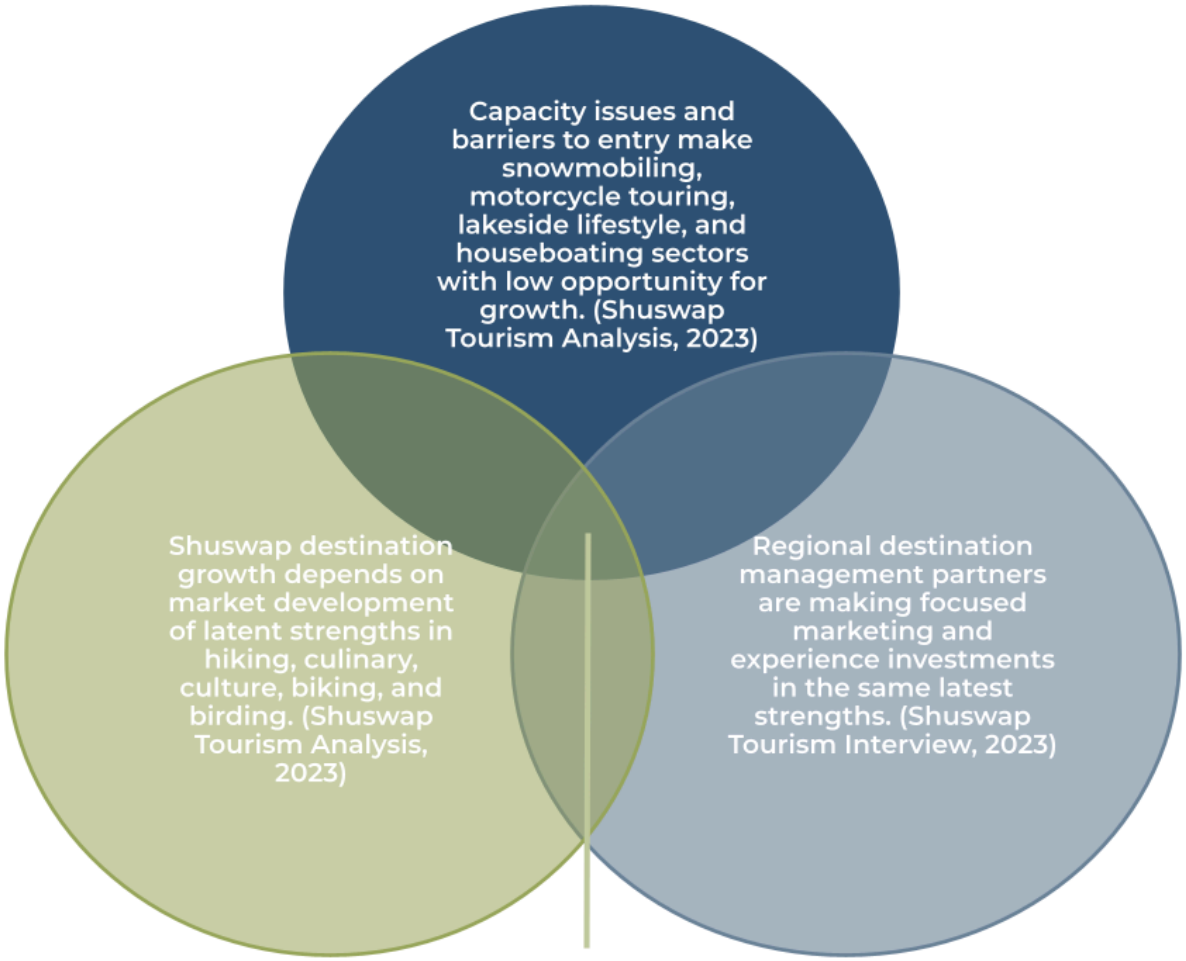
We can uncover the Shuswap community's personal beliefs, social values and views of the world using the EQ Quiz and community engagement feedback. Then, we can easily identify what kind(s) of travellers the community will relate to the most. The place where these two worlds intersect powers Shuswap Tourism's new destination and experience development focus.

When asked about their main market segment focus in the Destination Brand Audit, only 13% cited a reliance on traveller attitudes and beliefs. Over 80% rely on interest- or demographic-based targeting, likely due to the fact that Google and Meta audience builders make it easiest to do so.

Values should lead and should power your destination development, tourism experiences, and marketing. More powerful and transformational experiences come from taking the time to understand how your community values overlap with those of your "best" visitor.

The Shuswap region's greatest opportunity rests in building up experiences and infrastructure to attract those online travellers who are passionate about embracing, discovering, and immersing themselves in the culture, people, and places they visit.

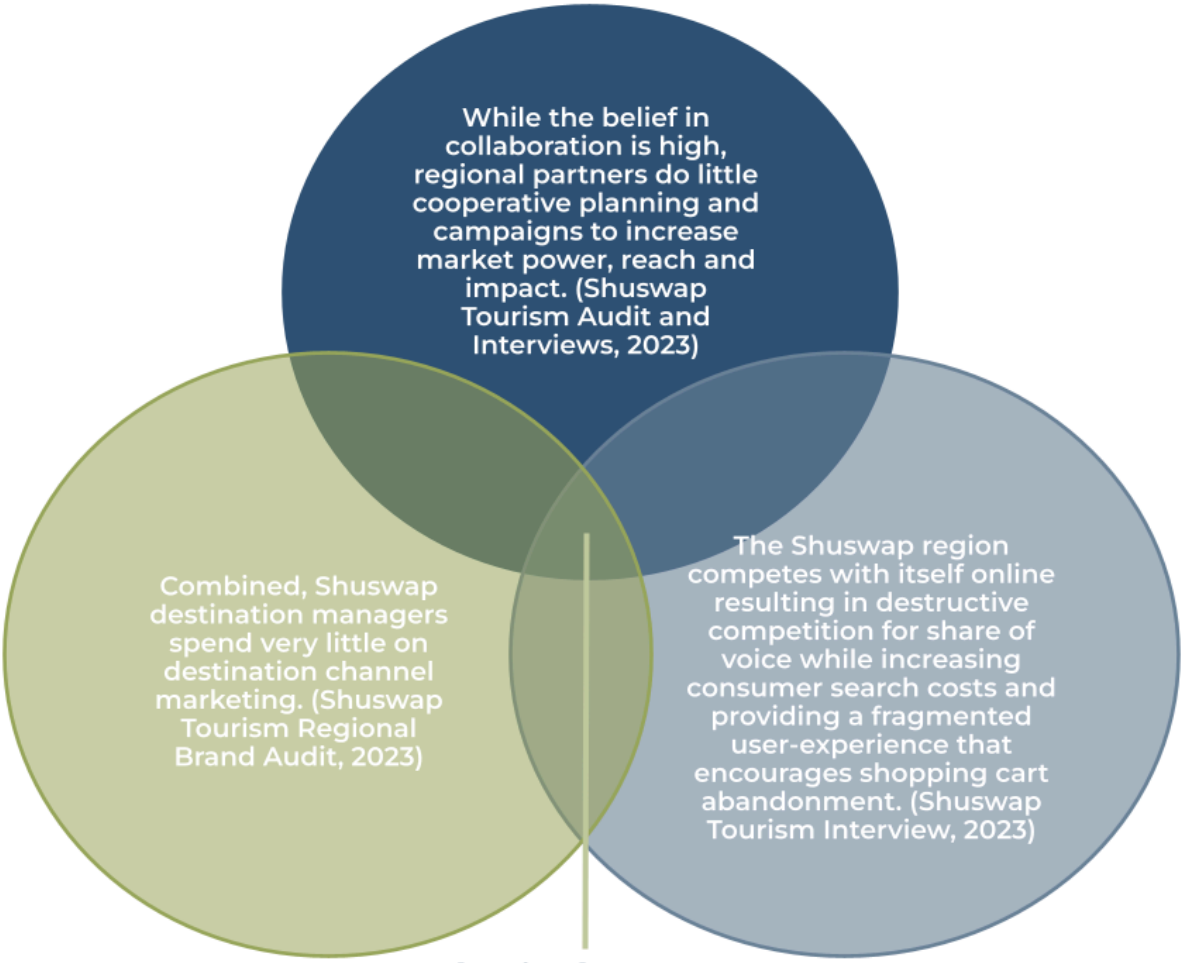
Strategic Insights



What's the story?

The Shuswap region has an opportunity to pull ahead of the competition in key experience battlegrounds. Strong community support and a local identity that embraces an active lifestyle, eating local, and promoting the arts has sown the perfect conditions for growing market share in experience categories that will see tourism improve community well-being year-round.

Destination managers will need to join forces to focus marketing and development resources on latent growth opportunities, while spending less but still defending the economic yield from core market experiences that are the region's bread and butter.



What's the story?

Destination managers will need to join forces to focus marketing and development resources on latent growth opportunities, while spending less but still defending the economic yield from core market experiences that are the region's bread and butter.

Regional destination marketers have the leadership acumen needed to bring higher-level or 'first-order' thinking to the table. During a Question Burst exercise, regional marketing leaders were able to quickly pose questions whose solutions would accelerate the Shuswap region's collective performance.

First-order priorities should be to align planning processes, co-op marketing, target segments, and commitments about roles and responsibilities along the path-to-purchase.

Strategy

Harness latent experience strengths in hiking, culinary, culture, biking, and birding by coordinating a heavy regional investment focus on sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.

Overview of Key Initiatives

- Hiking: Build out a destination trail multi-day hike to Cinnemousun Narrows Provincial Park (see shuswaptrails.com)
- Biking: Rail Trail development from Shuswap to South Okanagan (ie. Sicamous to Armstrong...to Osoyoos). Groundwork commenced also in Enderby.
- Culture: Support Salmon Arm Cultural Master plan, and scale up SAEDS event management approach to provide strategic and grant funding support for regional events like the planned Sicamous Riverside Guitar Festival
- Birding: Support local investments in developing the Shuswap leg of the BC Bird Trail with targeted interests-based marketing
- Sledding: Partner with EVSA, Sicamous and Revelstoke equivalents to develop a capacity and yield management program
- Advocacy: Provide regional partners with capacity to manage development issues and leverage plans that require government buy-in, foster a positive tourism investment climate, and encourage partnerships that amplify cultural and ecological areas of interest and concern
- Institute a collaborative planning framework to develop and continuously improve a regional marketing focus
- Pool resources to develop and house regional and local market research that provides insights about the user experience. Leverage the TOTA Research Consortium, citizen science, and social media polling to generate more localized insights.
- Develop and rollout a refreshed regional marketing segmentation strategy that better leverages the competitive advantage of EQ
- Align budgets, human resources, and marketing communications focus against the most relevant and important stages of the P2P: awareness and consideration
- Implement a UX strategy that better aligns regional digital investments to provide a more seamless traveller experience along the most important brand touchpoints
- Adopt a defensive marketing strategy to maintain market share in dominant sectors. Conduct nudge marketing campaigns to encourage positive visitor behaviours and reduce over-tourism impacts.

Table 07. Flex the Full Strength of Our Experience

Flex the Full Strength of Our Experience
Harness latent experience strengths in hiking, culinary, culture, biking, and birding by coordinating a heavy regional investment focus on sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.

Key Initiative	Start	Resource(s)
1. Hiking: Partner with Shuswap Trail Alliance to build out a destination trail multi-day hike to Cinnemousun Narrows Provincial Park	2024	Partnership, Business Plan
2. Biking: Support Rail Trail development from Shuswap to South Okanagan (ie. Sicamous to Armstrong...to Osoyoos), as well as groundwork commenced in Enderby.	Ongoing	TBC
3. Culture: Support Salmon Arm Cultural Master plan, and scale up SAEDS event management approach to provide strategic and grant funding support for regional events like the planned Sicamous Riverside Guitar Festival	2024	Funding
4. Birding: Support local investments in developing the Shuswap leg of the BC Bird Trail with targeted interests-based marketing	2024	Partnership, Funding
5. Sledding: Partner with EVSA, Sicamous and Revelstoke equivalents to develop a capacity and yield management program	2025	Partnership, Funding
6. Advocacy: Provide regional partners with capacity to manage development issues and leverage plans that require government buy-in like Sicamous plans to convert Eagle River Golf & Country Club into a campground	2024	Internal
7. Advocacy: Foster a positive tourism investment climate by working with all levels of government business permitting to ensure local businesses understand requirements and in turn, governments understand the need for business certainty	2025	Internal
8. Advocacy: Amplify the cultural and ecological importance of the Adams River by partnering with the Secwépemc and Adams River Salmon Society to create a compelling video series detailing riverway active fire recovery and rehabilitation efforts.	2024	Partnership, Funding
9. Institute a collaborative planning framework to develop and continuously improve a regional marketing focus	Annually Q3 2024 Start	Internal
10. Pool resources to develop and house regional and local market research that provides insights about the user experience. Leverage the TOTA Research Consortium, citizen science and social media polling to generate more localized insights.	2024	Funding
11. Develop and rollout a refreshed regional marketing segmentation strategy that better leverages the competitive advantage of EQ	2024	Internal

Flex the Full Strength of Our Experience
Harness latent experience strengths in hiking, culinary, culture, biking, and birding by coordinating a heavy regional investment focus on sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.

Key Initiative	Start	Resource(s)
12. Align budgets, human resources, and marketing communications focus against the most relevant and important stages of the P2P: awareness and consideration	2024	Internal
13. Implement a UX strategy that better aligns regional digital investments to provide a more seamless traveller experience along the most important brand touchpoints	2025	Internal
14. Adopt a defensive marketing strategy to maintain market share in dominant sectors. Conduct nudge marketing campaigns to encourage positive visitor behaviours and reduce over-tourism impacts.	2025	Funding

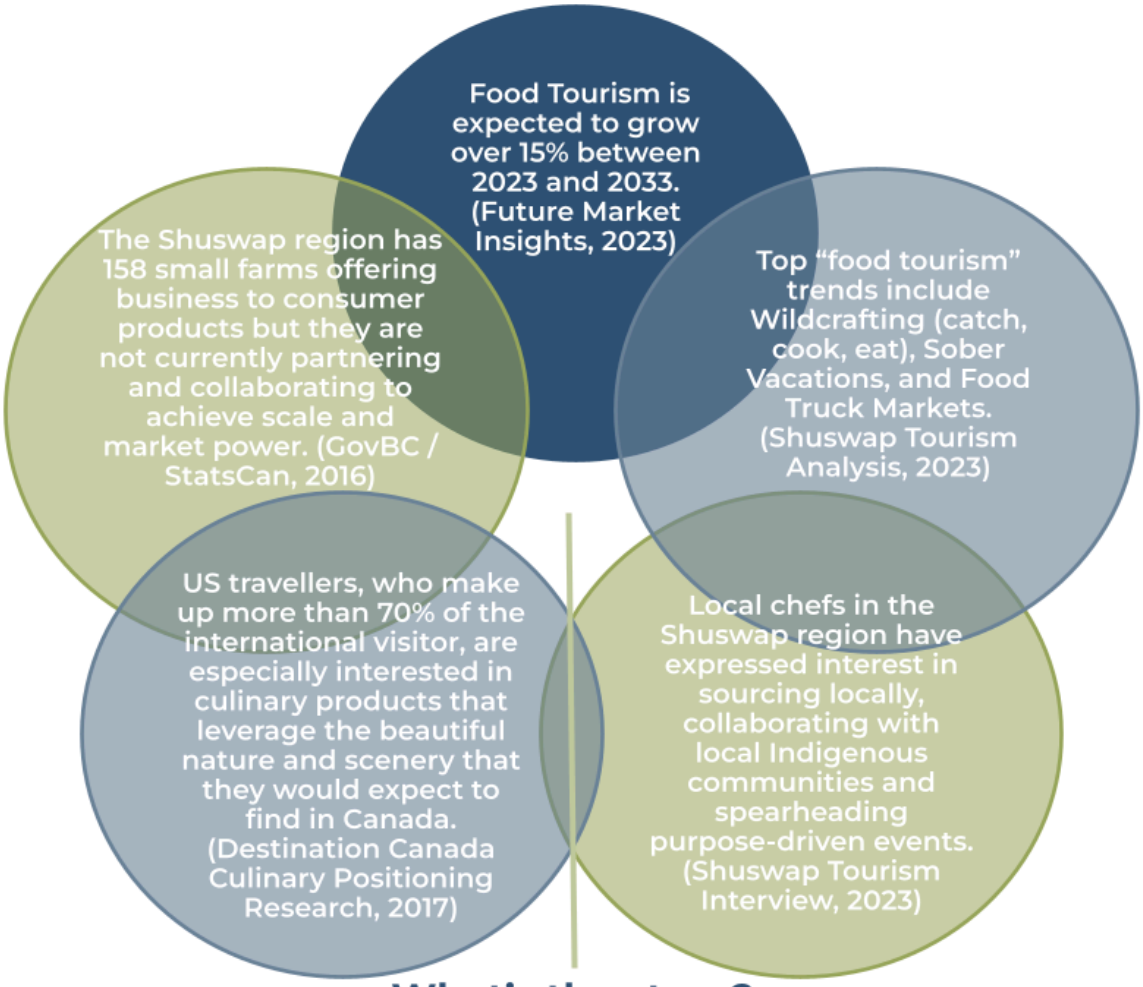
4. Share the Best Bites of the Shuswap

Culinary experiences present strong growth potential and a source of competitive advantage in the future with some development and investment in the Shuswap region.

The Shuswap region has strong connectors like the Shuswap Trail Alliance, Eagle Valley Snowmobile Club, Shuswap BackCountry Riders, and many others who work tirelessly behind the scenes to openly share their special places with visitors. Without a formalized local culinary association of their own, chefs, restaurant owners, event planners, farmers, and tour guides will need to collaborate to build a unique food tourism experience that will be a destination draw.

Solutions will run up and down the entire value chain. A focus on growing deep, not broad, will help build local clusters of businesses from scratch to diversify. The small farm movements present particular strong advantages for Indigenous communities looking to increase their food sovereignty.

Strategic Insights[5]



What's the story?

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[5] Destination Canada Culinary Positioning Research, 2017 | Future Market Insights, 2023 | GovBC/StatsCan, 2016 | Shuswap Tourism Analysis, 2023: https://www.riversidecranberries.ca/, https://cvfm.ca/, https://letseattheworld.com/, https://www.nytimes.com/2023/01/03/travel/butchery-course-vacation.html, https://swallowtail.ca/pop-dining/hunt-gather-dinner/, https://moosemeatandmarmalade.com/about-the-show/

Solutions will run up and down the entire value chain. A focus on growing deep, not broad, will help build local clusters of businesses from scratch to diversify. The small farm movements present particular strong advantages for Indigenous communities looking to increase their food sovereignty.

Strategy

Harness the collective market power of regional food tourism-related businesses so that the Shuswap region has formalized focus, capacity, and funding to develop a competitive advantage in the agritourism and culinary tourism space.

Overview of Key Initiatives

- Help develop and support a local culinary advisory body with a representative from Shuswap Farmers, Chef's Restaurants, Accommodations, First Nations Hunters-Gatherers, and Tour Providers
- Work with the local small farm movement and local business accelerators to build high-potential business clusters from scratch such as local farm food delivery service or a pop-up alcohol free beverage shop
- Build up the local agritourism sector as part of the Farm Gate project
- Support Pay it Forward culinary events to thank wildfire and COVID frontline staff and volunteers

Table 08. Share the Best Bites of the Shuswap

Share the Best Bites of the Shuswap Harness the collective market power of regional food tourism-related businesses so that the Shuswap region has formalized focus, capacity, and funding to develop a competitive advantage in the agritourism and culinary tourism space.		
Key Initiative	**Start**	**Resource(s)**
1. Help develop and support a local culinary advisory body with a representative from Shuswap Farmers, Chef's Restaurants, Accommodations, First Nations Hunters-Gatherers, and Tour Providers	2025	Administration
2. Work with the local small farm movement and local business accelerators to build high-potential business clusters from scratch such as local farm food delivery service or a pop-up alcohol free beverage shop	2026	Internal

3. Build up the local agritourism sector by recruiting and managing an inventory of roadside and immersive agritourism experiences as part of the Farm Gate project so these experiences can be promoted	2024	Funding
4. Support *Pay it Forward* culinary events to thank wildfire and COVID frontline staff and volunteers	2024	Funding

5. Foster the Secwépemc Indigenous Economy

With the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) now law in BC and the province's guiding framework for reconciliation, The Shuswap region has a duty to work collaboratively with local Indigenous communities.

Rather than just legislated, the reasons for working with local Indigenous communities should be related to what the Heiltsuk Nation calls 'turning things around and making them right again.' Economic Reconciliation will improve the well-being of all in the Shuswap region, and could be considered the single most important driver of more sustainable values, behaviours, and outcomes for the Shuswap tourism region as a whole.

Strategic Insights

What's the story?

With the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) now law in BC and the province's guiding framework

for reconciliation, The Shuswap region has a duty to work collaboratively with local Indigenous communities.

Rather than just legislated, the reasons for working with local Indigenous communities should be related to what the Heiltsuk Nation calls '*turning things around and making them right again*.' Economic Reconciliation will improve the well-being of all in the Shuswap region, and could be considered the single most important driver of more sustainable values, behaviours, and outcomes for the Shuswap tourism region as a whole.

Tourism professionals should avoid any attempts to divert urgent Indigenous capacity away from the primacy of social issues and projects. Unless the Indigenous community has an economic development arm ready to dedicate internal staff resources AND a tribal council willing to engage and get community buy-in, the tourism industry's best opportunity to support the resurgence of the Indigenous economy rests in fostering entrepreneurship and supporting these new businesses to engage with their community.

Strategy 1

Foster Indigenous entrepreneurship by supporting existing and new Indigenous tourism businesses with business coaching and mentoring that increases Indigenous operator capacity and improves the support they receive from their local community members, administrations, and traditional governance.

Overview of Key Initiatives

- Support an annual intake into the Full Circle Indigenous business accelerator program to local Secwépemc entrepreneurs to provide resources to mentor, coach, and encourage Indigenous community members interested in started a business (see fullcircle.indigenousworx.com)
- Leverage relationship and expertise of ITBC Regional Specialist to identify partnership opportunities, and support their local presentations about the value of Indigenous tourism
- Collaborate with local Indigenous economic development departments on capacity building solutions
- Support Splatsin and Adams Lake RV park and campground operations, especially with yield management, infrastructure development, and human resources management

Table 09 Foster the Secwépemc Indigenous Economy - Strategy 1

Foster the Secwépemc Indigenous Economy Foster Indigenous entrepreneurship by supporting existing and new Indigenous tourism businesses with business coaching and mentoring that increases Indigenous operator capacity and improves the support they receive from their local community members, administrations, and traditional governance.		
Key Initiative	**Start**	**Resource(s)**
1. Support an annual intake into the Full Circle Indigenous business accelerator program to local Secwépemc entrepreneurs to provide resources to mentor, coach, and encourage Indigenous community members interested in started a business (see fullcircle.indigenousworx.com)	2025	Partnership
2. Leverage relationship and expertise of ITBC Regional Specialist to identify partnership opportunities, and support their local presentations about the value of Indigenous tourism	Ongoing	Internal
3. Collaborate with local Indigenous economic development departments on capacity building solutions	Ongoing	Funding
4. Support Splatsin and Adams Lake RV park and campground operations, especially with yield management, infrastructure development, and human resources management	Ongoing	Funding

Strategy 2

Work with Secwépemc entrepreneurs to develop and launch Indigenous wildcrafting tours that will simultaneously support the local Indigenous economy and the Shuswap region's food tourism market development focus.

Overview of Key Initiatives

- Support Secwépemc entrepreneurs to register for the Full Circle business accelerator to develop a tour business around hunting, trapping, gathering or fishing
- Help Secwépemc entrepreneurs to partner with complimentary local tourism-related businesses who can provide business mentorship, market access, and valued-adding experiences. For example, work with a local Chef to to cook and serve the food sourced during the tour with a pop-up culinary event and hotel stay package.

Table 10. Foster the Secwépemc Indigenous Economy - Strategy 2

Foster the Secwépemc Indigenous Economy
Work with Secwépemc entrepreneurs to develop and launch Indigenous wildcrafting tours that will simultaneously support the local Indigenous economy and the Shuswap region's food tourism market development focus.

Key Initiative	Start	Resource(s)
1. Support Secwépemc entrepreneurs to register for the Full Circle business accelerator to develop a tour business around hunting, trapping, gathering or fishing	2025	Partnership
2. Help Secwépemc entrepreneurs to partner with complimentary local tourism-related businesses who can provide business mentorship, market access, and valued-adding experiences. For example, work with a local Chef to to cook and serve the food sourced during the tour with a pop-up culinary event and hotel stay package.	Ongoing	Internal

6. Empower People to Achieve

Addressing inequality and social divides is crucial. Rather than relying on trickle-down economics to naturally hand-out benefits and well-being, destination managers need to enact proactive approaches to make sure the local economy delivers benefits more fairly and efficiently.

Looking inside the community, diversity and inclusivity also means ensuring community members have equal access to support and opportunities regardless of their race, heritage, gender, and sexual orientation. Focus also needs to be on community members in recovery, dealing with mental health issues or physical disabilities, or rebuilding their lives after being in the corrections system. Aside from being the right thing to do, there are also significant cost savings and social benefits.[6]

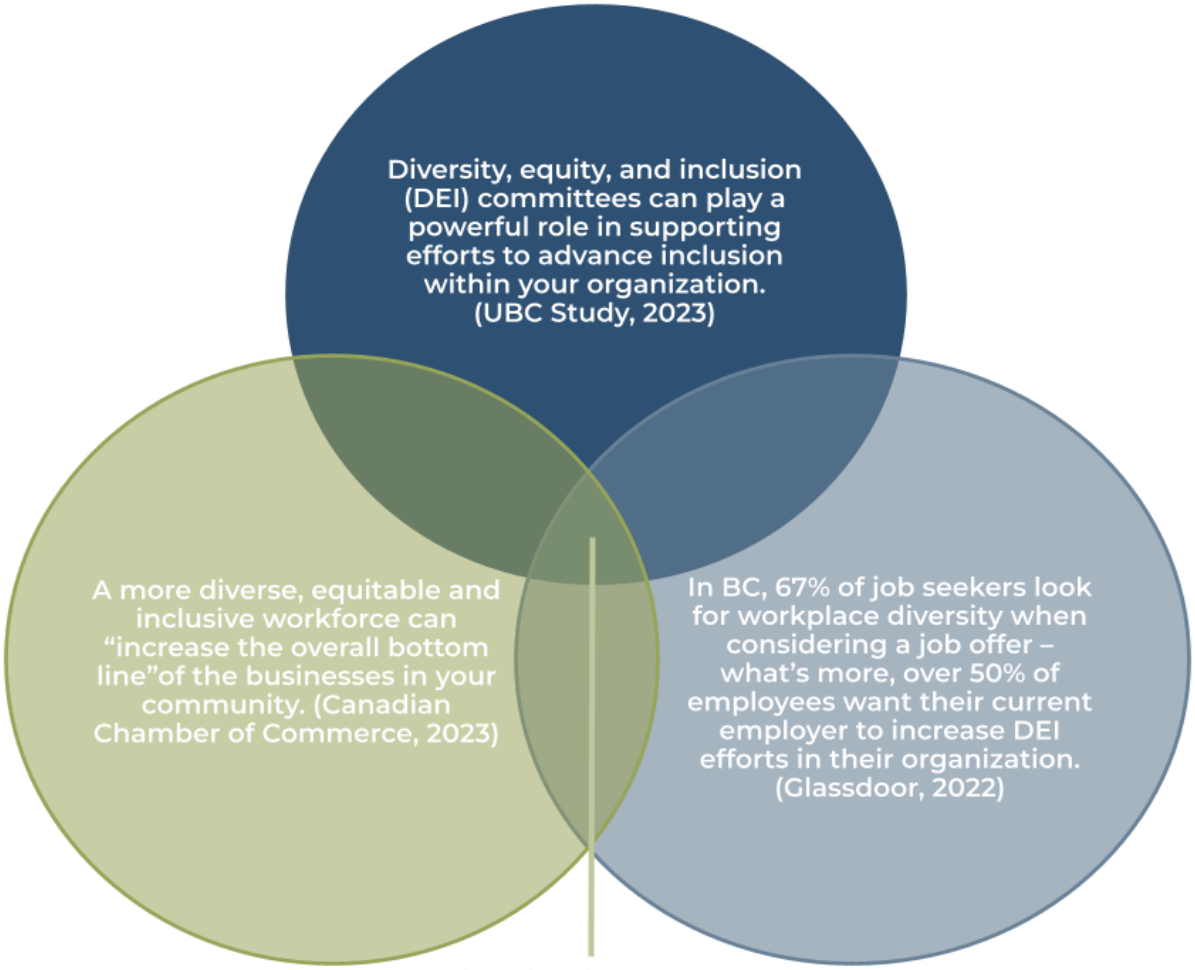
In addition to addressing inequality and barriers to employment, inclusivity also means "meeting people where they are at". Not everyone can (or even wants) to work a 9-5 job.

As one of the most impoverished and barriered neighbourhoods in the country, the downtown eastside in Vancouver (DTES) needed a radical new strategy that created diverse and inclusive employment. Together with staff from the City of Vancouver, the strategy was co-created in 2016 by staff and a group of 35 community groups, businesses, residents, and other local stakeholders.

Rather than squeezing people into traditional forms of employment and entrepreneurship, the DTES chose to see the economy as a "continuum of income and employment opportunities through which residents create their livelihoods". Among the many impressive wins and approaches, they also created a social innovation corridor built expressly to service hyper-local employment interests whether more informal or more formal.[7]

Strategic Insights

[6] The Beautiful Bailout: How a Social Innovation Scale-up Will Solve Government's Priciest Problems, Shaun Loney with Will Braun, 2018
[7] Community Economic Development Plan, City of Vancouver, 2017

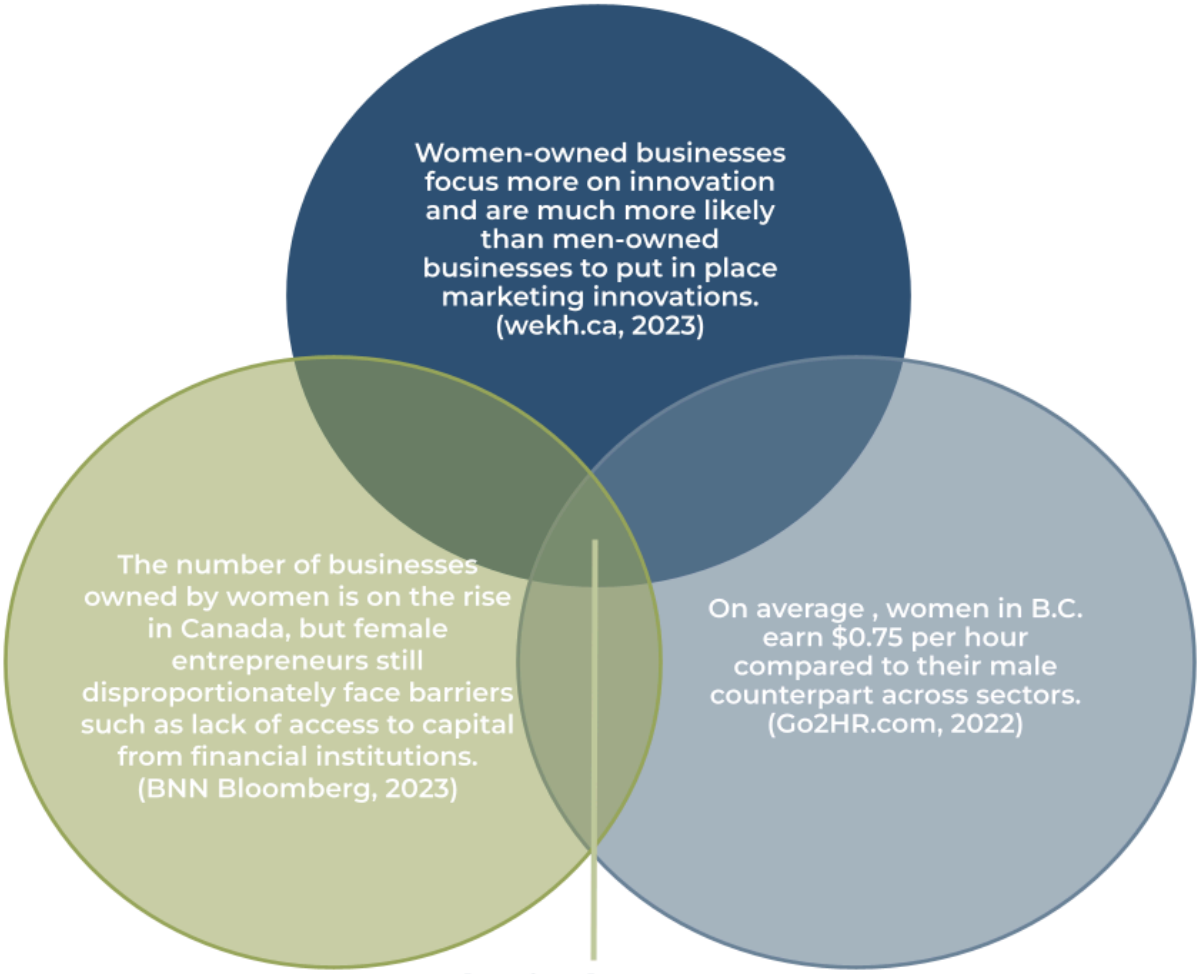


What's the story?

The majority of Shuswap tourism-related businesses noted that, to their knowledge, none of their employees identify with a minority group (ie. BIPOC, LGBTQ+, or a person with a disability). From the three (3) minority groups in question, businesses hired more BIPOC employees than those that identify as LGBTQ+ or as a person with a disability.

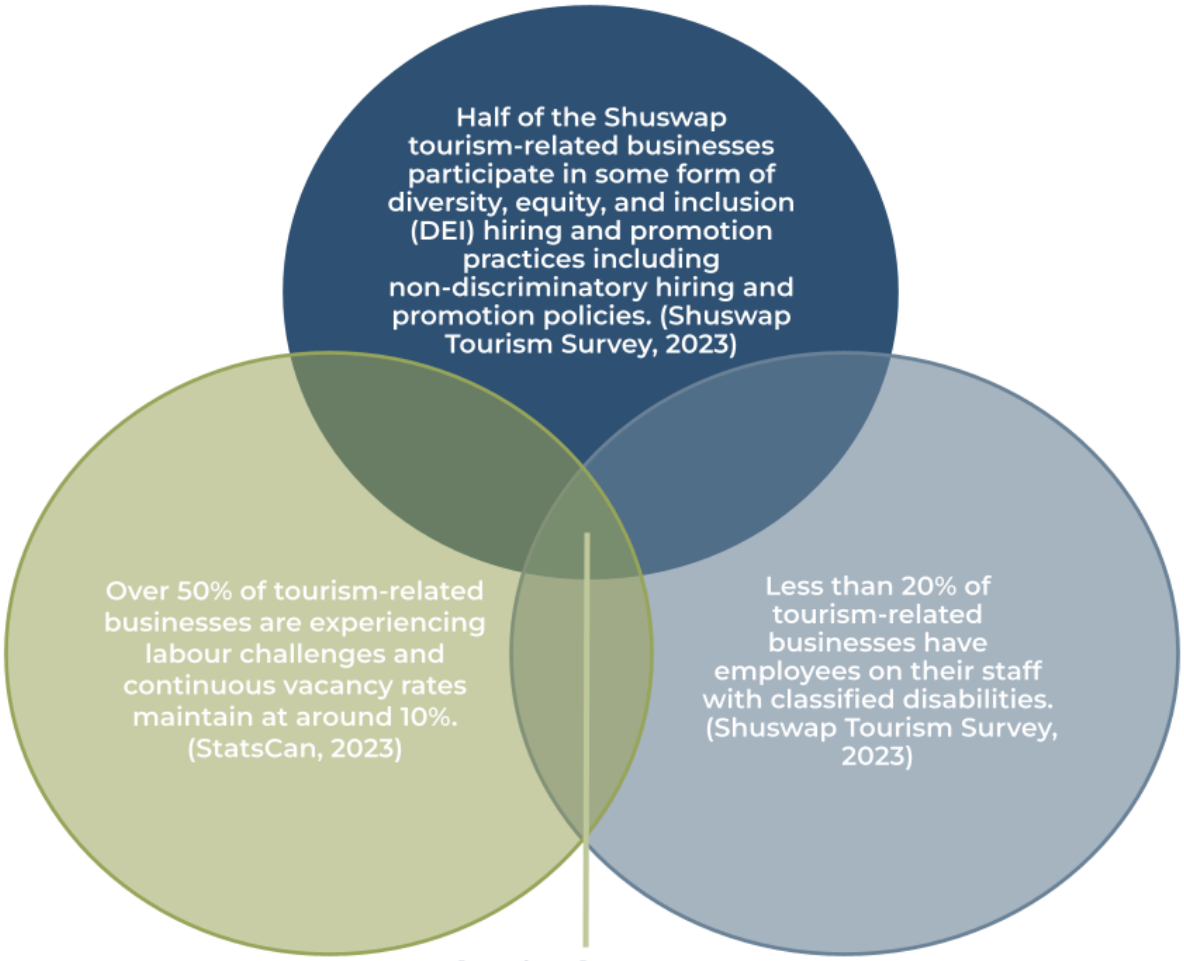
This provides a great opportunity to build platforms around hiring and welcoming more employee Diversity, Equity and Inclusiveness.[8]

[8] Sources: Canadian Chamber of Commerce, Website, September 2023 | Glassdoor DEI Report, Website, July 2022 | UBC Study, Guide download, June 2023 | Women Entrepreneurship Knowledge Hub, The state of women's entrepreneurship in Canada 2023, wekh.ca, June 2023 | BNN Bloomberg Study, September 2023 | Go2HR study, October 2022 | StatsCan Analysis on labour challenges in Canada, 2023



What's the story?

As 52% of business owners are female and 5% LGBTQ+, Shuswap tourism-related businesses would flourish through addressing and removing systemic barriers to employment, entrepreneurship, and access that women in business face.



What's the story?

The labour crisis within British Columbia and Canada for low skilled workers in tourism is anticipated to continue to grow and maintain at a rate that is twice as high as other industries. Embracing stronger DEI hiring practices and workplace accommodations would provide some relief in this very important area.

Empowering local accessibility champions to sometimes take the lead and sometimes advise, will prove the magic formula for making the Shuswap region a destination that ignites everyone's potential.

Strategy

Nurture a tourism destination culture that fosters creativity, fresh perspectives, and understanding by implementing and encouraging local businesses and tour operators to enforce policies and programs designed to empower BIPOC, LGBTQ2S+, retirees, and women.

Overview of Key Initiatives

- Partner with WORTH Association to host women-focused events to inspire and grow participation
- Hire an employment and DEI policy expert to audit the destination and develop a broad destination-wide policy
- Provide support and tools for tourism businesses to effectively implement and be in compliance with the BC Pay Transparency Act
- Undertake the development of a social procurement initiative to match home-based business supply of products with tourism-related business that could benefit (ie. small batch artisanal soaps to be used in hotels and/or restaurants)

Table 11. Empower People to Achieve

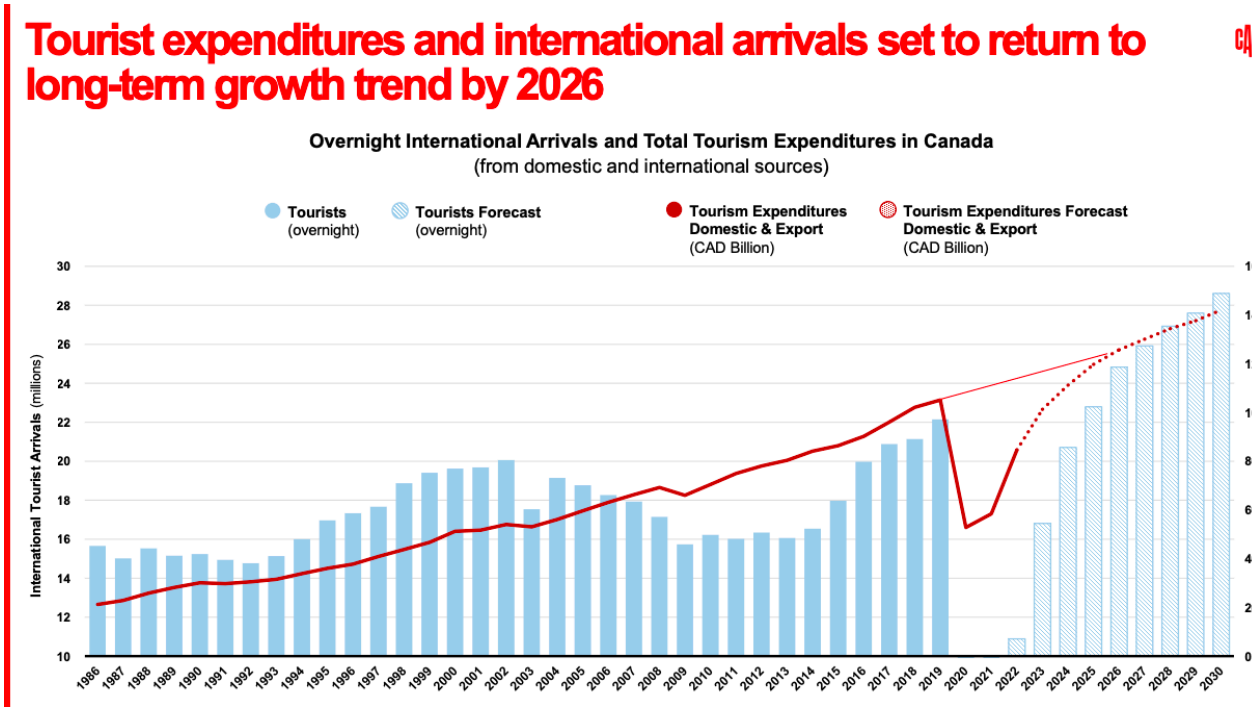
Empower People to Achieve Nurture a tourism destination culture that fosters creativity, fresh perspectives, and understanding by implementing and encouraging local businesses and tour operators to enforce policies and programs designed to empower BIPOC, LGBTQ2S+, retirees, and women.		
Key Initiative	**Start**	**Resource(s)**
1. Partner with WORTH Association to host women-focused event to inspire and grow participation	2026	Partnership
2. Hire an employment and DEI policy expert to audit the destination and develop a broad destination-wide policy	2025	Funding
3. Provide support and tools for tourism businesses to effectively implement and be in compliance with the BC Pay Transparency Act	2025	Internal
4. Undertake the development of a social procurement initiative to match home-based business supply of products with tourism-related business that could benefit (ie. small batch artisanal soaps to be used in hotels and/or restaurants)	2025	Funding

Appendix

Appendix A. Market Performance & Trends

With the longtail impacts of COVID still present, BC short-haul and neighbouring provincial markets continue to lead the recovery until international markets regain momentum in 2026.[9]

Figure A1. Tourism Expenditures and International Arrivals in Canada



Source: Destination Canada, 2023

While many trends impact tourism supply and demand, below are some of the main market trends that play to Shuswap Tourism's strengths and market position.

- Gen Z
- The Arts and Culture Renaissance
- Hiking
- True Local
- Culinary

[9] Destination Canada, 2023

Gen Z: Very soon, Millennials and Gen Z are expected to make up 75% of all consumers and travellers by 2025. Retailers and brands are still trying to figure out how to appeal to Gen Z, the generation that currently spans the ages of 7 to 22 and has a spending power of $143 billion.[10] Ninety-three percent of parents say their Gen Z children influence their household spending. Another 70 percent of parents ask their Gen Z kids for advice before making purchase decisions.[11]

The Arts and Culture Renaissance: Celebrating arts and culture can bring invested destinations strong acclaim and fame. In 1969, Robert Redford bought the land now known as Sundance and envisioned the careful growth of a community committed to the balance of art, nature and community. Today, Sundance Resort offers an atmosphere steeped in cultural heritage. The resort's values and vision launched the Sundance Institute which spawned generations of cult status indie films and launched the world's most influential independent film festival. Today, the resort community continues to host and embrace music events, festivals, and author series that celebrate independent thought and expression.

Hiking: Among the most enduring recent health and wellness trends, hiking remains among the top mindfulness and stress reduction activities, especially among luxury consumers. Epic scenery, rare topography and transformational point-to-point hikes drive fame and fortune for destinations lucky enough to have the right mix in their backyards.

True Local: COVID's impact on the North American mindset has only strengthened the focus on what is truly important to personal and community well-being. This awakening is powering a marked increase in demand for destinations and experiences backed by communities that value the same things. Experiencing authentic local culture was already a top need for many traveller segments, and now, its importance as a decision driver has hit the next level. Surfacing and celebrating local culture at every consumer touchpoint, as well as a strong 'buy local' campaigns have never been more important.

Culinary: Travellers are interested in connecting with food on a deeper level, to understand where it comes from and how it is harvested. Hands-on culinary experiences are emerging that provide travellers with the opportunity to hunt, gather, and butcher their own food before turning it over to a professional chef to create a delicious meal.

Farm-to-table experiences support local producers, appreciate the diversity of regional cuisines, connect visitors with nature and the community, and provide diners with a sustainable and ethical dining experience. Other key trends in culinary tourism include sober vacations, a street food movement that's still taking off, and farmer's market activations. A great example of a successful farmer's market activation is the Comox Valley Farmer Market, which offers diverse local farmers and

[10] Gen Zers, Business Insider, Dominic-Madori Davis, January 2020
[11] What Makes Them Buy: Gen Z Buyer Behaviors (Updated 2021), The Shelf, December 2020.

artisans in addition to local bands, entertainers, and food trucks both through the summer as well as off-season holiday and festivals.

Appendix B. Research and Engagement

Destination marketing and development should always bring together different stakeholders to achieve the common goal of a more sustainable destination. More than just market-driven, it respects community identity and works to conserve and protect local assets that makes the community livable and worth visiting. In this effort, well-rounded insights are required so destinations can plan for the future and fully consider the social, economic, cultural, and environmental risks and opportunities.

For this Shuswap Tourism work, the main research and engagement objectives were:

- Identify source(s) of 'sustained' competitive advantage that will see the Shuswap community thrive and grow
- Underline destination assets, strengths and opportunities that should be leveraged or improved on
- Uncover local economy tourism solutions that improve Shuswap community and destination well-being
- Surface opportunities to improve destination marketing that will deliver scale, efficiencies, reach and market power

The process required the active participation of diverse stakeholders. In the context of the project, the Shuswap Tourism stakeholder population was defined as:

- CSRD Board of Directors
- Shuswap Tourism Advisory Committee
- Indigenous leaders and partners
- Tourism-related businesses
- Community tourism champions and networks
- Community organizations and clubs
- Non-commercial recreation clubs
- Sector associations
- Community Non-profits (ie. arts, festivals)
- Local destination and business marketers

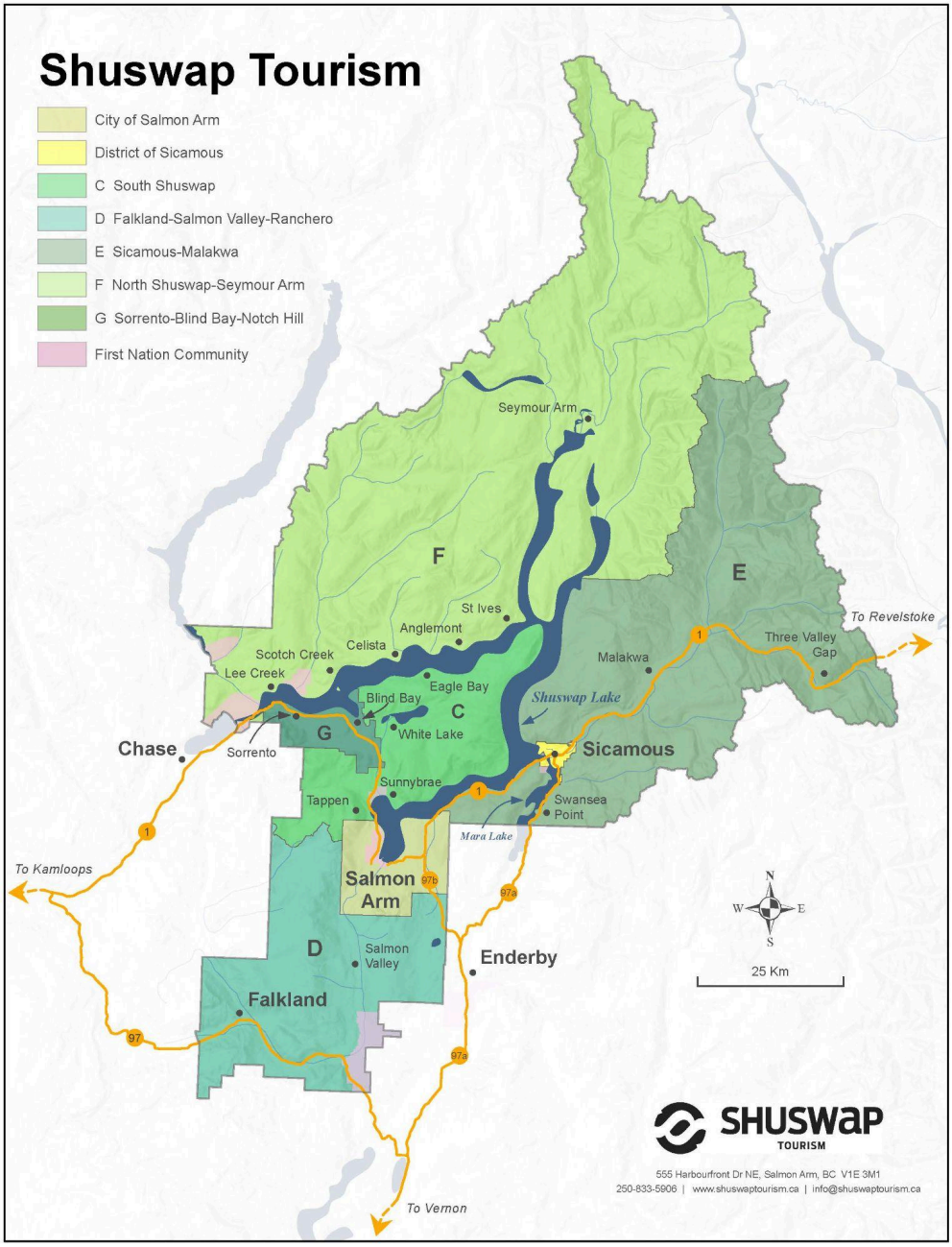
Shuswap Tourism Catchment Area

- Falkland & Area
- North Shuswap
- Salmon Arm

- Sicamous & Eagle Valley
- South Shuswap

Previously, Armstrong, Chase and Enderby paid into Shuswap Tourism $5,000 annual to be included, however these agreements have not been in place since 2019.

Figure B1. Shuswap Tourism Catchment Area



Source: Shuswap Tourism, 2023

Appendix C. Destination Brand Audit

Greater collaboration and laddering up the market power of destination brands within the Shuswap region presents significant opportunities and upside provided destination players are willing to work together efficiently and effectively on a common focus.

Following a standard destination marketing framework, a Shuswap Destination Brand Audit was designed to deliver the strategic insights and a common bar of understanding so that regional stakeholders can work together to develop a collaborative focus. The Brand Audit focused on three (3) key market-based management foundations.

Figure C1. Destination Brand Audit Market-Based Management Foundations

Key Insights

Working Culture

- Regional destination marketing experts admit that regional collaboration could be better. When asked what they do well, answers centred on individual strengths and isolated tactics.
- On average, they rated their own performance in working together as moderate. Meeting at set times of the year to make joint plans and resource allocations, celebrating each other's successes, building up a local pool of local research and data, creating content together, focused marketing co-op campaign, inviting leadership that creates a climate for success, empowering the community to act and finding scale efficiencies to cut costs and increase market power are all key areas of opportunity. The good news is that regional partners are up to the task.

- Regional destination marketers have the leadership acumen needed to bring higher-level or 'first-order' thinking to the table. During a Question Burst exercise, regional marketing leaders were able to quickly pose questions whose solutions would accelerate the Shuswap region's collective performance. While this Shuswap Destination Development and Marketing Strategy offers solutions to many of these questions, further questioning should be encouraged and time put aside to work collaboratively on solutions.

Market Analysis

- The Shuswap region needs a refreshed market segmentation strategy. Collectively the region rarely focuses marketing campaigns on specific target segments. Marketing briefs should always identify the target segment, including their fundamental attitudes, tastes and preferences, behaviours and channel preferences. Digital is the great equalizer and the Shuswap region has access to the same digital tools and suppliers as their biggest competitors. This provides an opportunity to customize, test, and optimize the performance of everything from marketing creative to channel selection.
- When asked about their main market segment focus, only 13% cited a reliance on traveller attitudes and beliefs. Over 80% rely on interest- or demographic-based targeting, likely due to the fact that Google and Meta audience builders make it easiest to do so.
- When asked how they want visitors to feel about the Shuswap region, answers focused on general emotional outcomes rather than pointed evidence that there is a widespread grasp of the emotional benefits that target segments are looking for.

Marketing Mix

- Despite the existence of strong regional and local destination brands, audit respondents do not feel that they are sufficiently leveraging the benefits of a strong destination brand. When it comes to capitalizing on awareness, loyalty and repeat visits, negotiating power, emotional impact and ability to charge a premium, respondents largely felt they were leaving money on the table.
- Interview feedback and audit responses show significant opportunity for the Shuswap region to better align and coordinate its marketing investments against the relevant stages of the path-to-purchase. For example, a destination experience position focused on building up awareness about hiking and culinary options in the shoulder-seasons is quite new to the market and will require heavy and patient investments in marketing tactics that build awareness and consideration. Presently, the region is dramatically underinvested in building awareness and consideration as a region or as a destination management organization working for their local community.

Only Explore Sicamous is making investments to create demand and move target audiences further down the P2P.

Method

The Shuswap Destination Brand Audit was conducted through a literature review of secondary sources, internet desk research, and marketing best practices.

To ensure validity and reliability of findings, Shuswap Tourism and Travel Local sought feedback from a Shuswap Destination Marketing Audit Board, a working group of regional destination managers from a cross-section of disciplines, who on a daily basis, directly influence the region's destination marketing approach. Moderate-to-high marketing knowledge was a prerequisite.

The purpose of the Shuswap Destination Brand Audit was to explore regional and local destination marketing enhancements that increase brand power, market impact and community well-being. Enhancements include but are not limited to marketing operations, insights, strategy, and channels.

Shuswap Destination Marketing Audit Board Composition

- Salmon Arm Economic Development Society
- District of Sicamous
- Shuswap Tourism
- Local Business
- Local Destination Marketing Experts
- Shuswap Tourism

Culture

Who Shuswap region destination managers consider themselves to be and how they define their role in relation to the role of their neighbours determines whether together, they foster authentic local tourism development or destructive competition.

Key Questions

- Who are we...really?
- What do we do well?
- How do we view our marketing neighbours?

- What are our most important strengths and assets in this work?

Findings

Destinations and businesses always operate in rich locations of culture, environment, and people. Community identity always plays a critical role in fostering authentic local development processes. It strikes at the heart of 'destructive competition,' and explains the dynamic tension between regions and communities.

On average, respondents rated their own performance in working together as moderate. Meeting at set times of the year to make joint plans and resource allocations, celebrating each other's successes, building up a local pool of local research and data, creating content together, focused marketing co-op campaign, inviting leadership that creates a climate for success, empowering the community to act and finding scale efficiencies to cut costs and increase market power are all key areas of opportunity. The good news is that regional partners are up to the task.

Regional destination marketers have the leadership acumen needed to bring higher-level or 'first-order' thinking to the table. During a Question Burst exercise, regional marketing leaders were able to quickly pose questions whose solutions would accelerate the Shuswap region's collective performance. When asked what they do well, answers centred on individual strengths and isolated tactics, however regional destination marketing experts also admitted that regional collaboration could be better.

Figure C2. Regional Collaboration

Source: Shuswap Destination Brand Audit Workshop, 2023

While this Shuswap Destination Development and Marketing Strategy offers solutions to many of these questions, further questioning should be encouraged and time put aside to work collaboratively on solutions.

Market Analysis

Market-based management strategies will deliver superior levels of visitor satisfaction, community well-being, and profitability only if a proper market analysis is done.

Key Questions

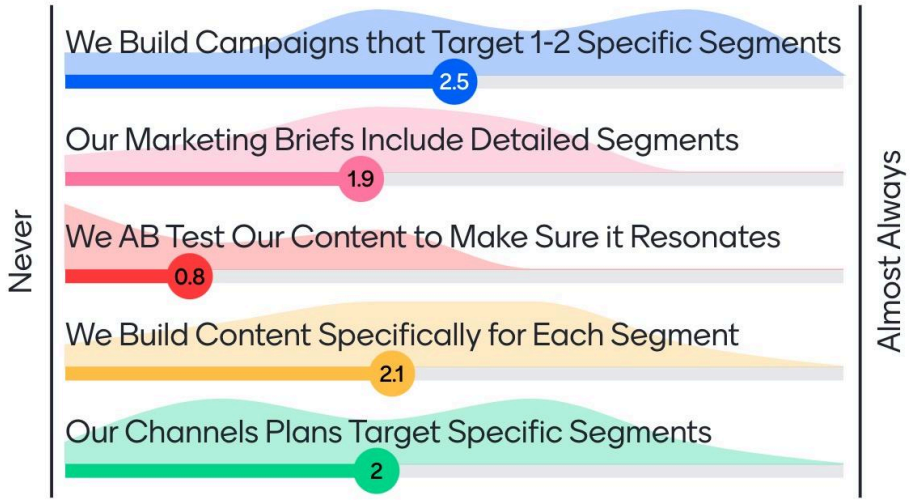
- What business are we in?
- What's our broad market vision?
- What's our untapped market potential?
- How are we going to manage market 'growth'?
- How much should we spend on marketing to get the 'growth' we want?
- Why are visitors satisfied or dissatisfied?
- What visitor value are we generating?
- What are the 'perceived' experience, service and brand benefits of our destination visitors?
- What are the emotional benefits our destination provides?
- What do our visitors need?
- What are our source(s) of advantage?

Findings

The Shuswap region needs a refreshed market segmentation strategy. Collectively the region rarely focuses marketing campaigns on specific target segments. Marketing briefs should always identify the target segment, including their fundamental attitudes, tastes and preferences, behaviours, and channel preferences. Digital is the great equalizer and the Shuswap region has access to the same digital tools and suppliers as their biggest competitors. This provides an opportunity to customize, test, and optimize the performance of everything from marketing creative to channel selection.

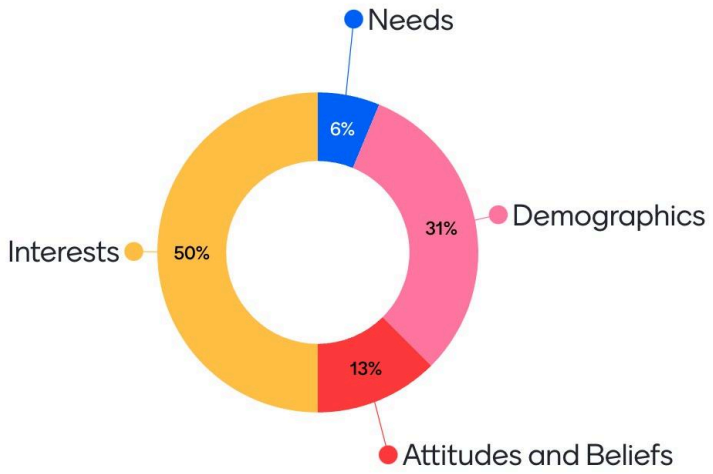
When asked about their main market segment focus, only 13% cited a reliance on traveller attitudes and beliefs. Over 80% rely on interest- or demographic-based targeting, likely due to the fact that Google and Meta audience builders make it easiest to do so.

Figure C3. Market Segmentation



Source: Shuswap Destination Brand Audit Workshop, 2023

Figure C4. Main Market Segment Focus



Source: Shuswap Destination Brand Audit Workshop, 2023

When asked how they want visitors to feel about the Shuswap region in another Question Burst exercise, answers focused on general emotional outcomes rather than pointed evidence that there is a widespread grasp of the emotional benefits that target segments are looking for.

Marketing Mix

A market-based destination will influence local industry to set prices based on visitor needs and the strength of the destination's experience position relative to competitors. Only then, can destination marketers deploy tactical marketing

strategies that will trigger the performance results that signal a destination's goals are being reached, and that the overall VISION is on its way to being realized.

Key Questions

- How attractive is our destination's experience position?
- What are our brand assets and liabilities?
- How strong is our marketing effort?
- Is our destination value-priced?
- What channel approach is the most profitable for the local tourism industry?
- Where is tomorrow's visitor on the path-to-purchase (P2P)? How aligned are our marketing communications with the visitor response we want to influence?

Findings

Despite the existence of strong regional and local destination brands, audit respondents do not feel that they are sufficiently leveraging the benefits of a strong destination brand. When it comes to capitalizing on awareness, loyalty and repeat visits, negotiating power, emotional impact, and ability to charge a premium, respondents largely felt they were leaving money on the table.

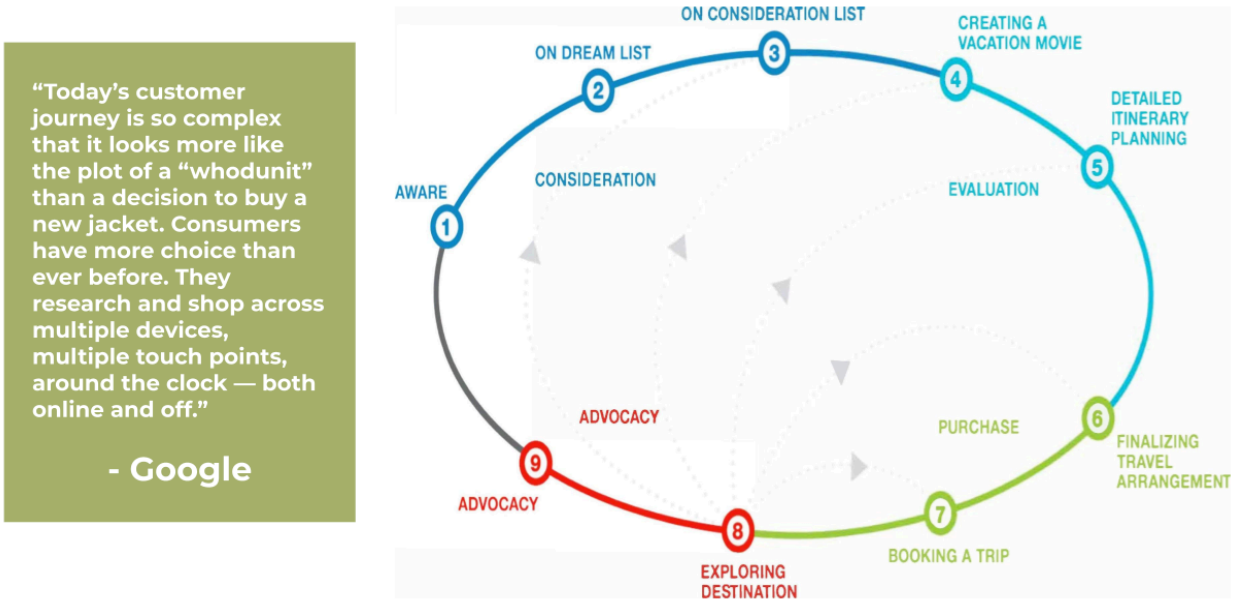
Figure C5. Leveraging the Shuswap Region as a Destination Brand

Source: Shuswap Destination Brand Audit Workshop, 2023

Travel's Path to Purchase (P2P)

Competition for consumer attention is fierce. Leisure travellers will come into contact with Shuswap region destination brands and many other competing messages numerous times at different points in their decision-making. Through word-of-mouth, they'll also influence others once they've experienced a destination, experience, product, or service themselves.

Figure C6. Travel's Path to Purchase



Marketing Along the Path to Purchase

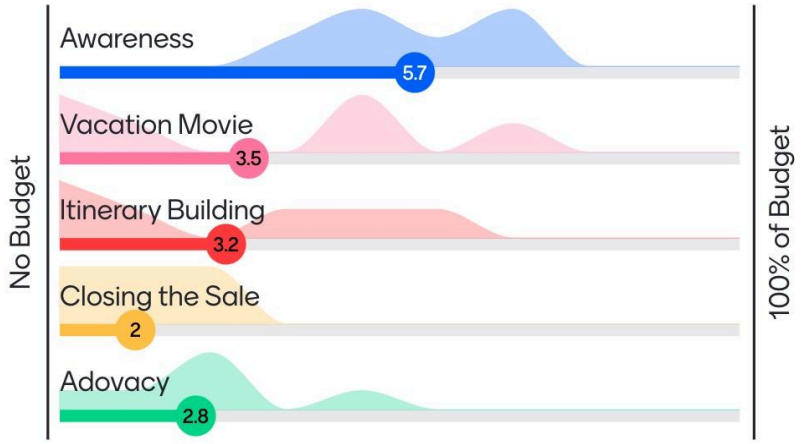
These are the most popular and tested tactics that destination marketers deploy based on where consumers are at along the P2P. For example, brand videos with inspiring and emotional messages are effective at increasing awareness of your destination. At the other end of the customer journey, social media and local ambassadors are two of the most effective channel tactics for helping to spread word-of-mouth about a destination's experience.

Figure C7. Marketing Along the Path to Purchase

Marketing Communications Channel Weight

Interview feedback and audit responses show significant opportunity for the Shuswap region to better align and coordinate its marketing investments against the relevant stages of the path-to-purchase. For example, a destination experience position focused on building up awareness about hiking and culinary options in the shoulder-seasons is quite new to the market and will require heavy and patient investments in marketing tactics that build awareness and consideration. Presently, the region is dramatically underinvested in building awareness and consideration as a region or as a destination management organization working for their local community. Only Explore Sicamous is making investments to create demand and move target audiences further down the P2P.

Figure C8. Marketing Communications Channel Weight



Source: Shuswap Destination Brand Audit Workshop, 2023

Appendix D. Survey

The Shuswap Destination Development Survey was designed to capture wider community opinions and feedback on opportunities, the current state, and future outlook for the Shuswap as a travel destination. Survey Monkey was used to deliver the online survey that was launched at the Shuswap Tourism Advisory Committee Workshop on November 3, 2023. The survey was promoted at the workshop, via the Shuswap Tourism e-newsletter, the Shuswap Tourism Destination Management Facebook Group, and direct personalized email to key stakeholders, ie. Tourism Advisory Committee, Board, etc. The survey ran from November 3 to December 2, 2023. Total response rate was N=61.

Survey Profile

The survey was programmed to capture respondent feedback in two (2) separate datasets, detailed below.

- Tourism-Related Businesses (N=35): Accommodations, Retail, Attractions, Tour Operators, Events, Food and Beverage, DMO, Municipal, Transportation
- Tourism Champions (N=26): CSRD Board of Directors, Shuswap Tourism Advisory Committee, Indigenous Leaders and Partners, Community Tourism

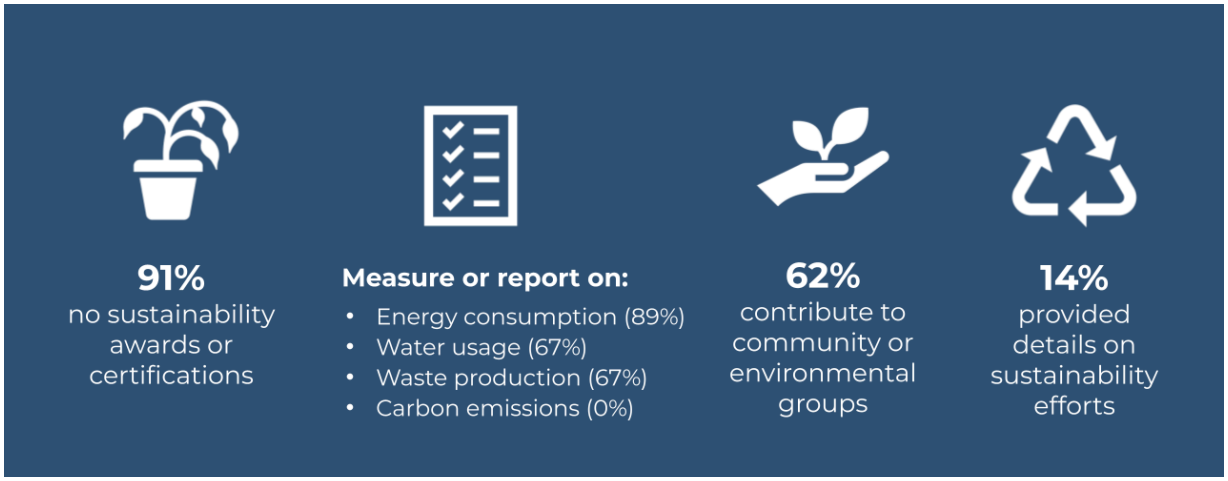
Key Insights

- The Shuswap region's greatest strength is its natural environment (primarily the lake) and the accessibility to year-round outdoor recreational opportunities. Additional strengths include the local food and wine scene, the region's rich culture and history, the area's small town feel, as well as its friendly people.
- The Shuswap region's greatest weakness is the fragmented / independent marketing and development strategies across the Shuswap regions. Other weaknesses include seasonal fluctuations in demand, poor transportation infrastructure, missing amenities, and a lack of organized DEI and Sustainability initiatives.
- The Shuswap region experiences external threats including climate change (primarily the resulting wildfires), labour shortages, and rising costs.
- Opportunities for the Shuswap region include the implementation of a unified marketing and development strategy across the participating regions, the expansion of the existing active transport network, the improvement and maintenance of roadways, the development of year-round family friendly activities, the development of tourism amenities, and the implementation of an organized sustainability strategy.
- Respondents felt that the municipalities, DMOs, local businesses, non-profits, the Indigenous community, and tourism champions would be allies in the region's efforts towards a new organizational and marketing strategy.

Tourism-Related Business Profile & Insights

- Survey respondents included tourism-related businesses (N=35) and tourism champions (N=26) at a combined total response rate of N=61.
- The majority of tourism-related business respondents were from the Accommodation (29%), Retail (23%), and Attraction (16%) sectors.
- Roughly 63% of tourism-related businesses have nine (9) or fewer employees and a heavy majority (47%) have fewer than five (5).
- The majority of tourism-related businesses noted that, to their knowledge, none of their employees identify with a minority group (ie. BIPOC, LGBTQ+, or a person with a disability). From the three (3) minority groups in question, businesses hired more BIPOC employees than those that identify as LGBTQ+ or as a person with a disability.
- 52% of the tourism-related business owners / operators identified as female. While several also identified as BIPOC, LGBTQ+, or a person with a disability, the second largest group (38%) did not identify with a minority group.
- 45% of tourism-related businesses have Diversity, Equity, and Inclusion (DEI) practices in place that include non-discriminatory hiring and promotion policies.
- Most tourism-related businesses (69%) ranked themselves as somewhat accessible.
- When asked who might be an ally in supporting sustainable tourism development, municipalities mentioned included the District of Sicamous, City of Salmon Arm, and the Village of Chase. Explore Sicamous, Shuswap Tourism, and TOTA were referenced as DMOs that would have the energy and power to get sustainable tourism development projects off the ground.

Figure D1. Shuswap Tourism-Related Business Sustainability Practices

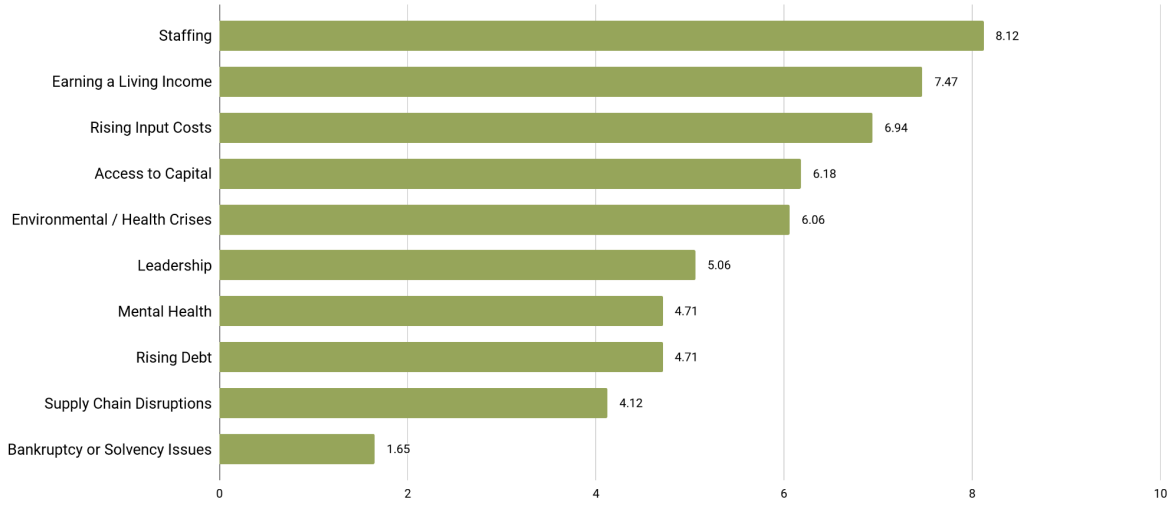


Source: Shuswap Tourism Destination Development Survey, 2023

Tourism-Related Business Insights on Strengths, Opportunities, and Challenges

- An overwhelming majority (88%) of tourism-related businesses agreed that the natural environment, and more specifically the lake, is the Shuswap region's strongest tourism asset. Outdoor recreation, local food and wine, and the Shuswap region's local culture and history were ranked behind the natural environment as other strong tourism assets.
- Tourism-related businesses identified the need for a more advanced active transportation network (ie. expanded trail system with bike and boat rentals), improvement and maintenance of roadways, as well as increased lake access as opportunities to strengthen tourism in the region.
- Inconsistencies in tourism marketing and development across the regions and seasonal fluctuations in demand were noted as main areas for improvement.
- Tourism-related businesses noted that common guest complaints are related to wildfires, poor road conditions and infrastructure, missing amenities (ie. Visitor info centre, public restrooms, taxis), and limited operating hours/experiences outside of peak seasons.

Table D1. Challenges that Tourism-Related Businesses Anticipate in the Next 5 Years



Source: Shuswap Tourism Destination Development Survey, 2023

Tourism Champion Insights

- Tourism-related businesses identified the need for a more advanced active transportation network (ie. expanded trail system with bike and boat rentals), improvement and maintenance of roadways, as well as increased lake access as opportunities to strengthen tourism in the region.

- Tourism champions agree with tourism-related businesses that an active transportation network would strengthen tourism in the region.

Figure D2. What Tourism Champions Don't Want to Sacrifice for Tourism

Source: Shuswap Tourism Destination Development Survey, 2023

Figure D3. Strongest Assets Ranked by Tourism Champions

Source: Shuswap Tourism Destination Development Survey, 2023

Appendix E. Interviews

One-on-one, semi-structured interviews collected insights from key stakeholders to gather the same understanding of the current state and opportunities. Focused on getting a deeper perspective, a total of 21 high-level stakeholder interviews were conducted from August 14 - 15, 2023 during Travel Local's on-site visit with Shuswap Tourism.

An additional nine (9) targeted interview participants were contacted with a request for a detailed interview over the period between October 10 - 20, 2023 to gather further insights.

Key Insights

- From the visitor perspective, the region's strengths include the beautiful natural amenities, accessible via well-kept trails and recreation opportunities. Moreover, the Shuswap region is home to a friendly and enthusiastic community.
- From the supply side, tourism stakeholders benefit from having a unique perspective on competition, such that they are more interested in collaboration. These strengths bode well for the region's capacity to offer holistic, sustainable, and unified tourism experiences.
- Internally, the destination struggles with inconsistent marketing and offerings as the various subregions operate independently; missing amenities including accommodation supply, wayfinding, and adequate lake access; as well as poor awareness due to a lack of FAM trips.
- Externally, the Shuswap region is threatened by climate change and wildfires; increasing costs of living; and tourism labour shortages.
- Opportunities for Shuswap Tourism include the development of a unified marketing approach, making the destination more tourism ready, building out shoulder seasons, and building market awareness.

Strengths & Assets

- Interview respondents identified a wealth of strengths in the Shuswap region including beautiful natural amenities, well-kept trails and recreation opportunities, a friendly community, and the capacity to offer holistic, sustainable, and unified tourism experiences.
- Common compliments received by visitors mainly highlight the beautiful environment including the lake and walking trails as well as the welcoming nature of the Shuswap community.
- More than half of the interviewed tourism stakeholders agree that the Shuswap community does a good job at providing access to nature through

well-kept trails and outdoor recreation opportunities. The region also succeeds in showing hospitality to visitors as its community is friendly and welcoming.

- The Shuswap community has a very unique perspective on competition, such that they "don't look at it as competition" rather they "think about partners" and are more interested in collaboration.

Challenges & Opportunities

- Weaknesses identified by tourism stakeholders include inconsistent marketing across subregions who operate independently, missing amenities (ie. accommodation supply, wayfinding, and adequate lake access), poor awareness (lack of FAM trips), and the threat of climate change and wildfires, as well as cost of living and labour shortages.
- Climate change and cost of living were both ranked as the highest areas of concern in the next couple of years.
- The greatest challenge currently facing the Shuswap region is housing. Homelessness is becoming a larger issue as there is a lack of affordable and rental housing inventory.
- A unified marketing approach and upgrades to the trail system were identified as key areas of opportunity in the region.
- Shuswap tourism stakeholders primarily look to other nearby destinations that are doing tourism well. Vancouver Island, specifically Tofino and Campbell River, offer a source of inspiration through their off-season marketing, atmosphere, and walkability.

Sustainability & Future Priorities

- Half of the respondents engage in some form of sustainable waste management practices including composting, recycling, and banning single-use plastics. Many maintain relationships with local farmers, artisans, and businesses in efforts to use local suppliers and partners.
- Looking ahead to the future, Shuswap tourism stakeholders tend to agree that a unified marketing approach and building shoulder seasons should be prioritized in both the short and long term.
- In efforts to build out tourism experiences, stakeholders suggest that Shuswap Tourism develop more guided experiences including tours of the farms, restaurants, trails, and lake.

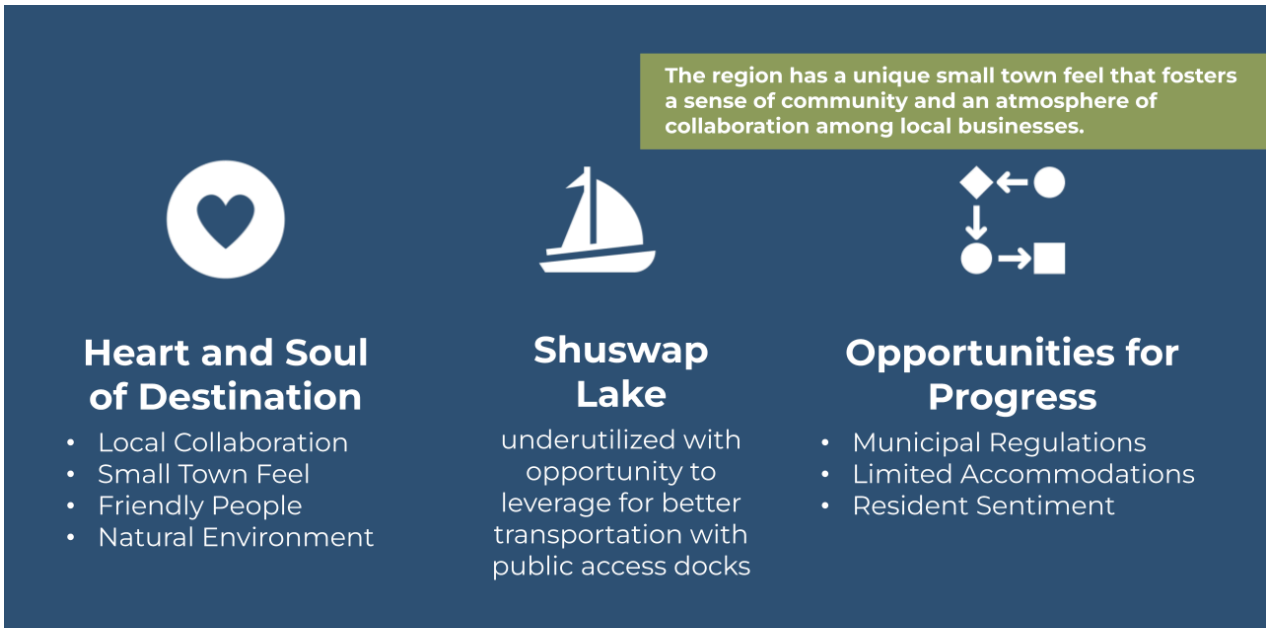
Appendix F. Focus Groups

A total of two (2) focus groups were conducted from August 14 - 15, 2023 during Travel Local's on-site visit with Shuswap Tourism: Sunnybrae (N=3) and Sorrento (N=5). These were completed as part of the one-on-one, semi-structured interviews designed to collect insights from key stakeholders.

Key Insights

- The Shuswap region's biggest strength is its collaborative atmosphere. Local tourism stakeholders recognize that there is greater value in working together than competing against one another. The Shuswap region also benefits from its friendly residents, small town feel, and natural amenities.
- Tourism development within the region has been hindered greatly by provincial, regional, and municipal regulations. Codes and zoning requirements have significantly increased development costs and timelines. As a result, the region is currently lacking tourism infrastructure in a number of areas.
- Tourism stakeholders see several opportunities for the sustainable development of Shuswap tourism including the need for tourism infrastructure development and the opportunity to attract new markets through the expansion of agri-tourism, community tourism, and soft adventure tourism experiences.

Figure F1. Focus Group Findings



Source: Shuswap Tourism Focus Group, 2023

Figure F2. Focus Group Insights on the Future

Source: Shuswap Tourism Focus Group, 2023

Appendix G. Shuswap Tourism Advisory Committee Workshop

Field research was completed during the Shuswap Tourism Advisory Committee Workshop including guests and local tourism champions on November 3, 2023. The workshop gathered perceptions, attitudes and beliefs about the ecological, social, and economic pressures facing the Shuswap region and explored a vision for what community well-being looks like in the region.

A total of 17 stakeholders participated in the workshop that featured dynamic exercises and interactive technology. Key insights and findings from the workshop exercises are detailed below.

Key Insights

- Shuswap region visitors and tourism businesses support movement toward "living within the doughnut" in a number of ways. Most notably, collaborative efforts by community champions and organizational partners have the biggest impact through advocacy, education, and donations. Other significant initiatives include environmental preservation efforts, food security programs, support-local initiatives, and community recreation and wellness programs.
- Within the Shuswap region, the most significant pressure created by tourism is damage to the local ecosystem. Other impacts worth considering include the unsustainable development of resident housing, improper waste management systems, poor governance over bylaws and taxes, exceeding capacity limitations, and contributing to vehicle emissions due to poor road conditions and limited active transport networks.
- Within the Shuswap region, the most notable social and ecological risks include overloading the capacity of the existing infrastructure, adapting to climate change, as well as environmental degradation. Other notable impacts that may become an increasing concern include business/park closures, threats to community safety, community dissatisfaction, increased social inequality, as well as population migration away from the Shuswap region.
- When asked to describe what success looks and feels like in the Shuswap region, the most frequent answers were experiencing joyful moments, connecting with people, and taking notice of the world.

Sustainability (Doughnut Exercise)

In 2009, the leading earth system scientists from around the world, came up with a way of measuring just how much pressure humans can safely put on the planet. They identified nine (9) boundaries that form the earth's 'Ecological Ceiling.'

4 Four boundaries relate to the air we breathe: localised air pollution, atmospheric ozone layer depletion, atmospheric carbon dioxide emissions leading to climate change and then dissolving into the oceans leading to ocean acidification.

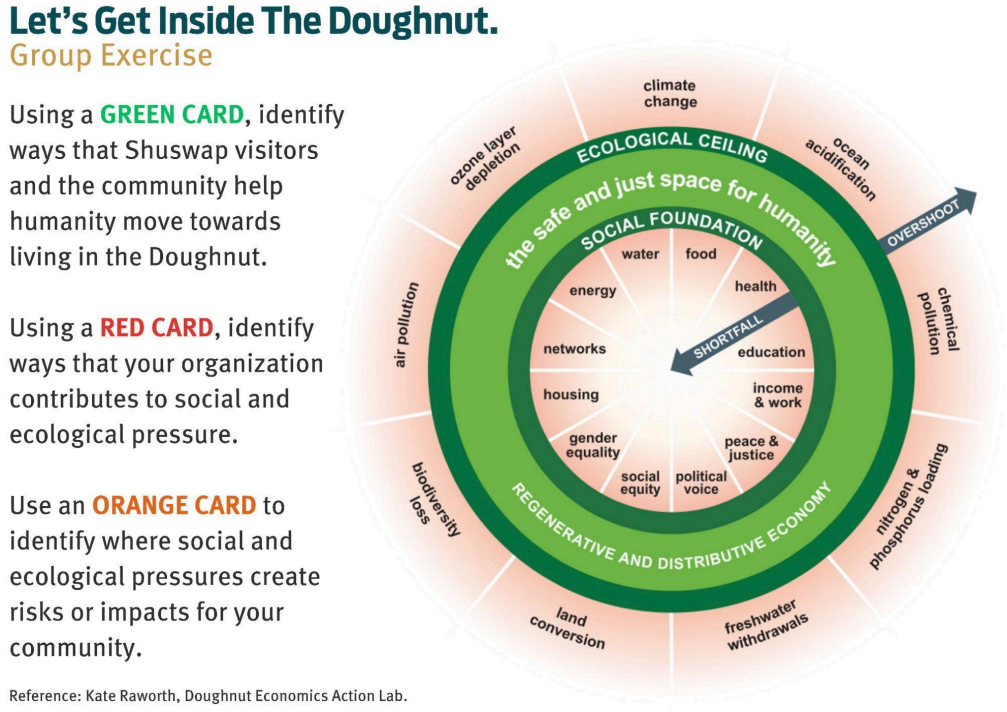
2 There are two boundaries that pollute the land and seas: chemical pollution (that include plastics, metals, synthetics and chemicals) that can't be returned to the planet's natural cycles; and nitrogen and phosphorus loading from industrial farming.

2 There are two localised impacts of freshwater withdrawals and land conversion (for farming, industry, housing, transport, and so on) that have immediate local effects, and that collectively undermine global resilience.

1 All of these have an impact on life and so lead to biodiversity loss.

Years later, regenerative economist Kate Raworth proposed there also needs to be an inner boundary that denotes the social foundation of what it means to meet the essentials of a good life. Recognizing that symbols and illustrations have great power to inspire change, the *Doughnut* became Raworth's illustrated model mapping the existence of these inner and outer ring boundaries, and the dangers of living outside them.

Figure G1. Doughnut Exercise



Source: Kate Raworth, Doughnut Economics Action Lab

Inspired by Raworth's team and the Doughnut Economics Action Lab (DEAL), Shuswap Tourism Advisory Committee workshop participants were taken through an exercise to help them understand the Doughnut, and to help them give voice to the pressures facing the local community.

Doughnut Exercise Findings

The Shuswap region supports humanity's movement toward "living within the doughnut" in a number of ways. Most notably, collaborative efforts by community champions and organizational partners like the Shuswap Trail Alliance, Shuswap Watershed, Economic Development Societies, and Council Chambers have the biggest impact through advocacy, education, and donations. Other significant initiatives include environmental preservation efforts through Communities in Bloom, Trail Voly Days, and Don't Move a Mussel campaigns; food security programs with the Eagle Valley Resource Society and local schools; support-local initiatives including farmers markets and the use of local suppliers; as well as community recreation and wellness programs like Unplug and Play.

Several respondents also highlighted initiatives that have been gaining traction within the community such as DEI practices, green waste management systems, partnerships with the Indigenous community, opportunities for arts and culture expression, and youth mentorship programs.

Table G1. Ways Shuswap Region Visitors and Businesses Help Humanity Move Towards Sustainability

	N	%
Community Champions and Partners	**12**	**27.9%**
Environmental Preservation Efforts	**6**	**14.0%**
Food Security Programs	4	9.3%
Supporting Local Businesses	4	9.3%
Recreation and Wellness Programs	4	9.3%
Diversity, Equity, and Inclusion Practices	3	7.0%
Waste Management Systems	3	7.0%
Indigenous Partnerships	2	4.7%
Arts and Culture Expression	2	4.7%
Youth Mentorship	2	4.7%

Source: Shuswap Tourism Advisory Committee Workshop, 2023 (N=43)

Despite efforts towards reducing and offsetting the impact of tourism, it is impossible to have tourism without contributing to social and ecological pressures in some capacity. Within the Shuswap region, the most significant pressure created by tourism is damage to the local ecosystem. This, most notably, includes the introduction of invasive species, damage or destruction to the land, and disruption to native wildlife. Other impacts worth considering include the unsustainable

development of resident housing, improper waste management systems, poor governance over bylaws and taxes, exceeding capacity limitations, and contributing to vehicle emissions due to poor road conditions and limited active transport networks. Other less significant impacts include the lack of visitor education and limited buy-in from small businesses towards community-wide initiatives.

Table G2. How Shuswap Region Businesses and Organizations Contribute to Social and Ecological Pressures

	N	%
Damage to Ecosystems	**10**	**18.9%**
Unsustainable Development	**5**	**9.4%**
Improper Waste Management	4	7.5%
Poor Governance	4	7.5%
Capacity Limitations	3	5.7%
Vehicle Emissions	3	5.7%
Poor Visitor Education	1	1.9%
Lack of Business Buy-In	1	1.9%

Source: Shuswap Tourism Advisory Committee Workshop, 2023 (N=53)

As the success of the tourism industry relies heavily on the well-being of its host community / environment, any contributed pressures will ultimately return as risks and impacts to the businesses that created them. Within the Shuswap region, the most notable social and ecological risks include overloading the capacity of the existing infrastructure (ie. overtourism, congestion / traffic, overfilling landfills, and creating infrastructure risks); adapting to climate change (ie. increased wildfires, droughts, and inclement weather); as well as environmental degradation (ie. declining water quality, loss of native species, and loss of habitat). Other notable impacts that may become an increasing concern include business / park closures, threats to community safety; community dissatisfaction, increased social inequality, as well as population migration away from the Shuswap region.

Table G3. Social and Ecological Pressures Impacting Shuswap Region Businesses

	N	%
Capacity Overload	**9**	**18.8%**
Climate Change	**7**	**14.6%**
Environmental Degradation	**7**	**14.6%**
Closures	5	10.4%
Community Safety	3	6.3%
Community Dissatisfaction	2	4.2%
Social Inequality	2	4.2%
Population Migration	1	2.1%

Source: Shuswap Tourism Advisory Committee Workshop, 2023 (N=48)

Destination Vision

1. Set the Vision

With the ecological and social impacts and opportunities more clear in their minds, workshop participants better understood that the economic foundations of destination management need to change. The most important being the need for a more evolved definition of growth. Raworth reminds that progress can no longer be endless growth. The future will ask us to "create economies that make us thrive, whether or not they grow".

Using an experiential sensory exercise, participants were asked to travel to the future and list what they considered evidence that the Shuswap region had realized its full potential as a sustainable destination. This method focused more on positive, emotionally motivated outcomes, rather than wordsmithing a lowest-common denominator community vision into a single paragraph.

Like a healthy forest, the evidence that community well-being is present forms the forest canopy: happy locals, personal health, financial equity, clean air, etc. Inputs like political power, money, human resources, assets, and infrastructure are more rarely (if ever) mentioned, but are understood to be the main inputs that will help the destination realize its vision of well-being.

Figure G2. Community Vision for Well-Being

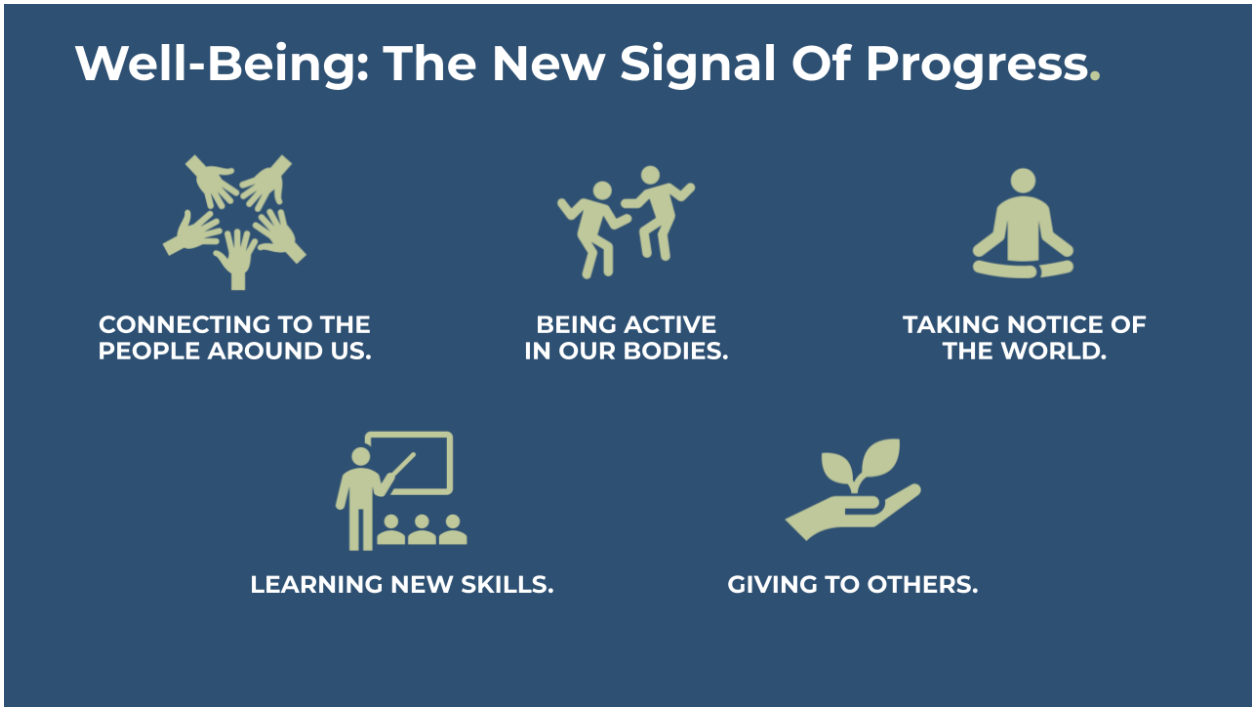
Source: Shuswap Tourism Advisory Committee Workshop, 2023

2. Set the Goal

After being introduced to the fundamentals of regenerative economics (see previous **Doughnut Exercise** section above), Shuswap Tourism Advisory Committee workshop participants helped set new destination development goals that fell out of the community's collective vision of a future where the Shuswap region and community is thriving.

Turning this new destination vision of well-being into goals requires a new framework for measuring community well-being. Following a thorough analysis, the New Economics Foundation distilled community well-being down to five (5) simple acts. Besides being more holistic, these measures also fall much more in line with Indigenous worldviews.

Figure G3. Framework for Measuring Community Well-Geing



Source: New Economics Foundation

Organizing workshop visioning feedback into one of these five simple acts, shows that experiencing joyful moments, connecting to people, taking notice of the world and prospering businesses and communities are the most important and relevant factors contributing to community well-being.

Table G4. Shuswap Vision for Well-Being: Signals of Progress

	N	%
Experiencing joyful moments	**16**	**51.6%**
Connecting to the people around us*	**13**	**41.9%**
Taking notice of the world*	**6**	**19.4%**
Prospering businesses and communities	5	16.1%
Being active in our bodies*	3	9.7%
Giving to others*	2	6.5%
Learning new skills*	2	6.5%
Feeling safe and secure	2	6.5%
Thriving Environment	1	3.2%

Sources: Shuswap Tourism Advisory Committee Workshop, 2023 | New Economics Foundation, 2008

With the Shuswap region's vision more clearly expressed and prioritized, a result-based measurement technique was applied to translate this vision into goals, illustrated in the below table. This same technique then translated these goals into relevant and reliable measures that could realistically be defined, implemented and used over time to signal whether or not Shuswap Tourism destination development plans were truly serving the community's vision.

Table G5. Shuswap Region Destination Vision - Goals, Measures and Targets

Destination Vision for Well-Being	Community Ranking	Goal	Measure	2024 Target
Experiencing Joyful Moments	1	Living, working and playing in the Shuswap region makes people happy	TQOL Index	Baseline
Connecting to the People Around Us	2	The Shuswap region has a strong sense of community	TQOL Index	Baseline
Taking Notice of the World	3	People are mindful, self-aware, present, unplugged, thoughtful, and curious.	TQOL Index	Baseline

Source: Shuswap Tourism Advisory Committee Workshop, 2023 | New Economics Foundation, 2008

3. Set the Measure

With the understanding that progress can no longer be measured in terms of growth, measuring whether or not we are reaching our destination goals focused on well-being then becomes a matter of generating the "right" signals. Using a technique to break specific goals down into strong and relevant measures, it becomes easier to see exactly what needs to be done.

While certainly new to the field of destination development, other professions and industries have developed a robust inventory to measure community well-being. A

quick internet search reveals dozens of formalized and tested methods that destination management leaders should review, discuss and adopt if the tourism industry is going to get serious about measuring non-economic performance indicators that signal improvements to key outcomes that are expected from more sustainable tourism practices.

While the concept of well-being is difficult to define, there is a general consensus that it comprises of several dimensions. One approach to capturing quality of life (QOL) assessments has been to measure each dimension independently. This approach, however, can only yield narrow insights that are difficult to cross-examine towards delivering strategic and holistic solutions. An index, on the other hand, holds the capacity to capture the full picture. By using a consistent approach towards measuring each QOL dimension, an index is capable of not only providing comparable measures across each dimension, but also an aggregated and single measure of well-being.

After a comprehensive literature review of tourism and non-tourism well-being and quality of life indexes, Travel Local's research team recommends that destinations use the rigorously developed and tested Tourism and Quality of Life Index (TQOL).[12] With 38 validated QOL indicators, the TQOL instrument not only captures residents' quality of life satisfaction but also the extent to which tourism is perceived to influence this assessment. These insights can help identify the role that tourism plays towards QOL within the destination as well as areas of focus for sustainable development.

[12] Sources: Andereck, K., & Jurowski, C. (2006). Tourism and quality of life. Quality tourism experiences, 136-154 | Andereck, K. L., & Nyaupane, G. (2010). Development of a tourism and quality-of-life instrument. In Quality-of-life community indicators for parks, recreation and tourism management (pp. 95-113). Dordrecht: Springer Netherlands | Andereck, K. L., & Nyaupane, G. P. (2011). Exploring the nature of tourism and quality of life perceptions among residents. Journal of Travel research, 50(3), 248-260.

Appendix H. Competitive Analysis

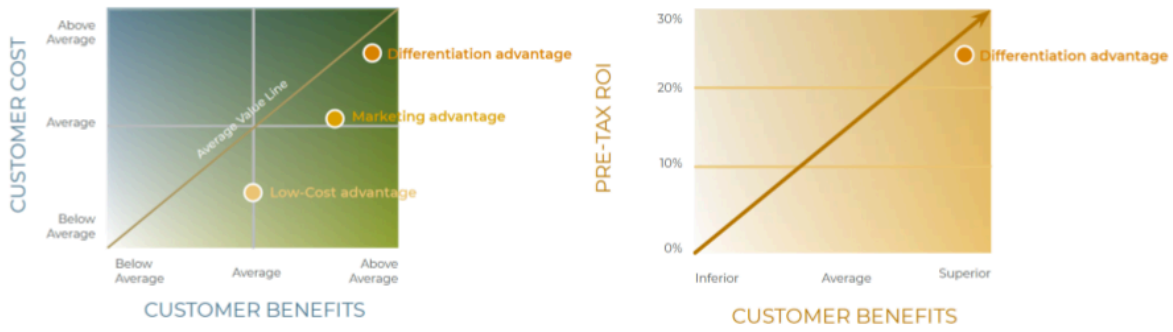
Competitive Advantage, Customer Values, and Profitability

Cutting costs is often just a band-aid solution, while outspending the competition on marketing isn't an option given current budgets and the business climate, not to mention that the same digital marketing tools are available to anyone. Focusing on being different, service quality, and your reputation will deliver not only your strongest advantage, but also your largest return-on-investment. It's also not easily duplicated by competitors.

Understanding the forces shaping the Shuswap region's competitive position offers important insights and clues that can be used to grow market share at the expense of competitors, or at least to set stretch goals in pursuit of a market leader.

The Shuswap region has limited options when it comes to selecting its source of advantage. Cutting costs undercuts a destination's value proposition and more often erodes long term profitability. Outspending the competition on marketing isn't an option either given current budgets and the business climate, not to mention that the same digital marketing tools are available to anyone. Focusing on being different, service quality, and the Shuswap region's reputation will deliver not only the strongest advantage, but also its largest return-on-investment. It's also not easily duplicated by competitors.

Figure H1. Competitive Forces that Shape Tourism's Competitive Position and Profitability



Shuswap Destination Competitive Analysis

With summer and winter presenting limited growth options, marketing in the fall and spring presents the Shuswap region with an opportunity to harness its collaborative marketing power in order to more strongly differentiate itself and perhaps take second and even first position from the usual suspects and new competitors like Golden and Nelson.

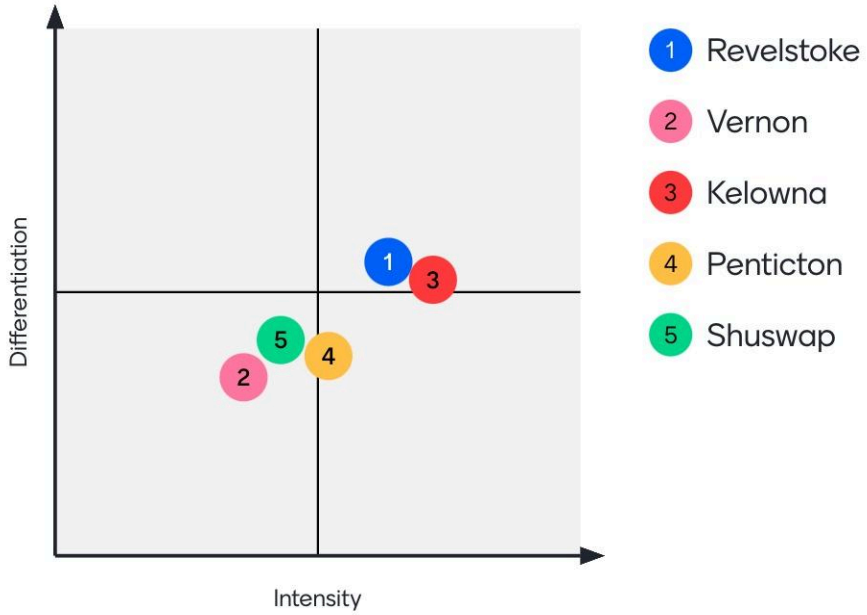
Key Insights

- As a multiseason destination that banks on lakeside lifestyle as a primary tourism experience, the Shuswap region competes with Vernon, Revelstoke, Golden, and Nelson.
- Like its competitors, the Shuswap region is marketed as a four-season destination targeted towards families and groups interested in recreation and leisure, adventure, arts and culture, or unique dining experiences. Unlike its competitors, however, Shuswap Tourism is not currently marketing towards the MICE industry, sports tourism, nightlife, luxury, or accessible travel.
- The Shuswap region's unique selling points include the lake, outdoor summer recreation, houseboats, cultural events, and local food and drink experiences.
- Although the Shuswap region's offerings are comparable to its competitors, they may not be as developed or robust for tourism. The Shuswap region also suffers from a fragmented marketing strategy. Other weaknesses include seasonality, poor transportation infrastructure, and limited market visibility.
- The Shuswap region falls in the middle of the pack when it comes to overall product offerings. More specifically, the region performs stronger than its competitive set when it comes to spring / summer offerings but the weakest in the fall / winter. Additionally, the Shuswap region scored the highest on leisure and arts and culture tourism offerings but fell behind on recreation and adventure.
- Tourism products within the Shuswap region compete in every visitor value category. Nobtaly, however, the majority of tourism products in the Shuswap region fall to the right of the performance index, providing strong "Value for Money".

Competitive Analysis (Summer)

When polled, Shuswap tourism stakeholders felt their destination trailed Revelstoke and Kelowna, which they felt are more differentiated and make their market power felt in the summer. Shuswap respondents took a much more moderate view of its market influence, finding their peak season competitive differentiation and intensity swimming somewhere between Vernon and Penticton.

Table H1. Shuswap Region Competitive Advantage (Summer)

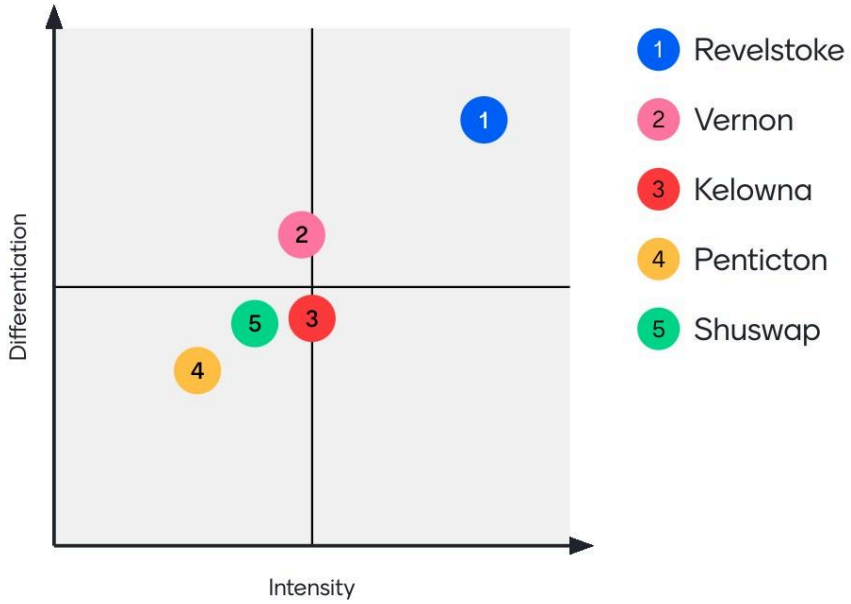


Source: Shuswap Destination Brand Audit Workshop, 2023

Competitive Analysis (Winter)

Under the blanket of winter, Revelstoke soars above all destinations in the competitive set. Vernon is second with Shuswap wedged in the middle this time between Kelowna and Penticton.

Table H2. Shuswap Region Competitive Advantage (Winter)



Source: Shuswap Destination Brand Audit Workshop, 2023

Competitive Set Overview

Taking a market-based management approach to analyzing the destination's competition, the project looked for product, service and reputation-based opportunities that present potential sources of advantage. Competitive intelligence gathering also measured how intensely the Shuswap region competes with other destinations in BC.

Shuswap Region Competitive Set

- Vernon
- Revelstoke
- Golden
- Nelson

The Shuswap region holds a strong position amongst its competitive set. As a multiseason destination that offers lakeside lifestyle as a primary tourism experience, the Shuswap region is most comparable to Vernon, Revelstoke, Golden, and Nelson. The region's average performance rating is 4.4, in line with Revelstoke and Nelson. When comparing tourism product offerings, the region's competitive intensity is high in the summer and low in the winter.

With respect to visitor positioning, the Shuswap region, like its competitors, markets itself as a four-season destination targeted towards families and groups interested in recreation and leisure, adventure, arts and culture, or unique dining experiences. The region is accessible for both domestic and international travellers and primarily offers standard economic pricing options. Unlike its competitors, however, the Shuswap region is not currently marketing the MICE industry, sports tourism, nightlife, luxury, or accessible travel experiences.

The region's unique selling points (USP) include the Shuswap Lake, outdoor recreation experiences, houseboats, cultural events, and local food and drink experiences. These are similar to the USPs of the competitive set in many ways as most are known for their lakes and parks, local dining experiences, as well as their arts and culture scene. A weakness for the Shuswap region, however, is that although its offerings may be comparable they may not be as developed or robust for tourism as its competitors. For instance, while there are many free / low-cost outdoor recreation experiences in the Shuswap region, many of the surrounding destinations have mountain resorts, vacation packages, guided tours, and retail to capitalize on these visitors and bring further benefits to the region.

The Shuswap tourism industry's weaknesses are similar to its competitors such that it experiences seasonal fluctuations, poor transportation infrastructure and accessibility, as well as limited market visibility. Uniquely, however, the Shuswap

region also suffers from a fragmented marketing strategy across its participating regions.

Table H3. Shuswap Region Competitive Set

Destination (Performance Rating)	Visitor Positioning	USP	Weaknesses	Direct International Air Access	Competitive Intensity Winter / Summer	
Shuswap (4.4)	- Four-season travel - Families and groups - Recreation and leisure - Adventure seekers - Arts and culture buffs - Foodies - Domestic & Intl. - Standard pricing	- Shuswap Lake - Outdoor recreation - Houseboats - Cultural events - Local food and drink	- Fragmented marketing - Low winter demand - Transport. infrastructure - Market visibility - Tourism amenities	No (YLW, 131 km)	Low	High
Vernon (4.2)	- Four-season travel - Families and groups - MICE industry - Recreation and leisure - Adventure seekers - Sports tourism - Arts and culture buffs - Foodies - Nightlife - Domestic & Intl. - Standard to luxury	- Lakes and parks - SilverStar Resort - Cultural District - Farms and ranches - Distilleries and wineries	- Overwhelming website - Wide product breadth - Shoulder demand - Market visibility - Tourism infrastructure	Yes (YLW, 40km)	High	High

Destination (Performance Rating)	Visitor Positioning	USP	Weaknesses	Direct International Air Access	Competitive Intensity Winter / Summer	
Revelstoke (4.4)	- Four-season travel - Families and groups - MICE industry - Recreation and leisure - Adventure seekers - Arts and culture buffs - Foodies - Nightlife - Accessible travel - Domestic & Intl. - Standard to luxury	- Revelstoke Resort - Mt. Revelstoke Park - Heli and Catskiing - Railway Museum - Outdoor adventure rec.	- Low summer demand - Transportation access - Capacity constraints - Accommodations - Limited visitor type	No (YLW, 187 km)	High	Mid
Golden (4.2)	- Four-season travel - Families and groups - Recreation and leisure - Adventure seekers - Sports tourism - Arts and culture buffs - Domestic & Intl. - Standard pricing	- Kicking Horse Resort - Yoho National Park - Columbia River - Outdoor recreation - Pedestrian Bridge	- Transportation access - No vehicle rentals - Arts and culture - Shoulder demand - Luxury offerings	No (YXC, 255 km)	Low	Mid

Destination (Performance Rating)	Visitor Positioning	USP	Weaknesses	Direct International Air Access	Competitive Intensity Winter / Summer	
Nelson (4.4)	- Four-season travel - Families and groups - Recreation and leisure - Adventure seekers - Sports tourism - Arts and culture buffs - Foodies - Domestic & Intl. - Standard to luxury	- Heritage landmarks - Arts and culture scene - Outdoor recreation - Eclectic shops/cafes - Kootenay Lake	- Transportation access - Shoulder demand - Market visibility - Capacity constraints - Affordability	No (GEG, 277 km)	Mid	Low

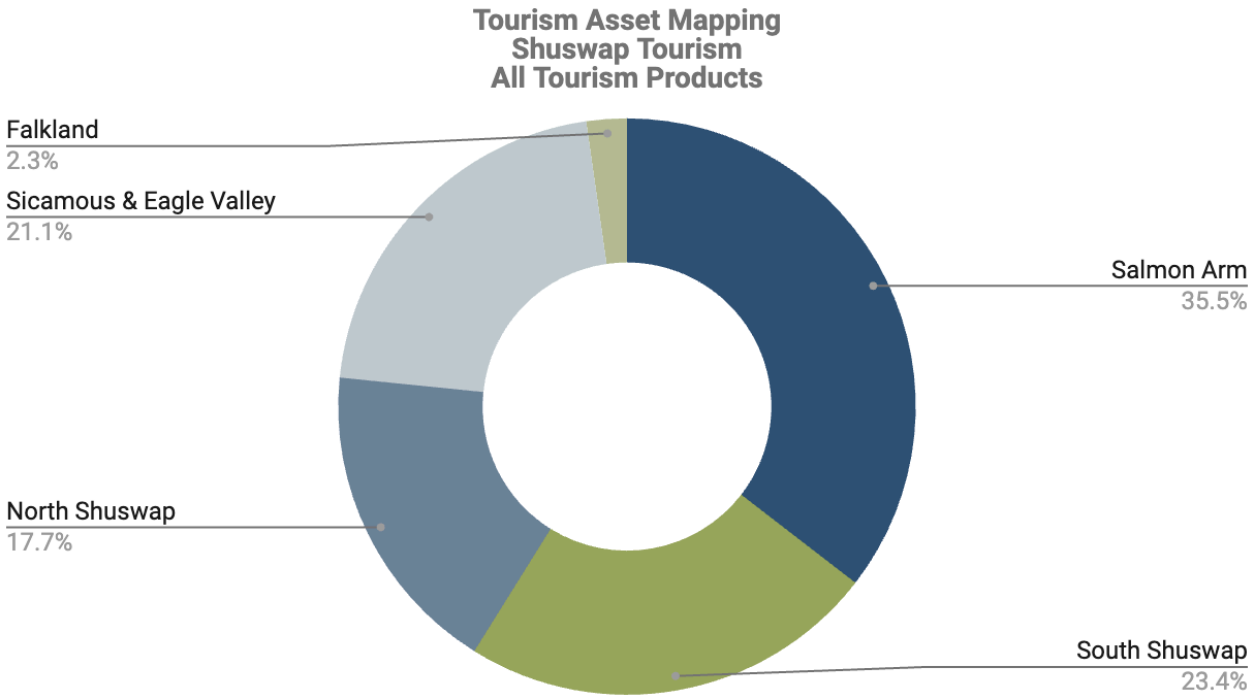
Appendix I. Product & Experience Analysis

Tourism Asset Mapping

While only 2.3% of the region's tourism products are in Falkland, the rest are distributed among Salmon Arm (35.5%), South Shuswap (23.4%), Sicamous and Eagle Valley (21.1%), and North Shuswap (17.7%) respectively. This distribution varies, however, when reviewing specific tourism products such as accommodations, dining, and experiences.

Encouraging product dispersion is key to building a tourism economy that distributes gains and impacts more evenly across invested communities. Overall, there appears to be a need to build out tourism offerings within the Falkland subregion.

Table I1. Shuswap Tourism Asset Mapping - All Tourism Products



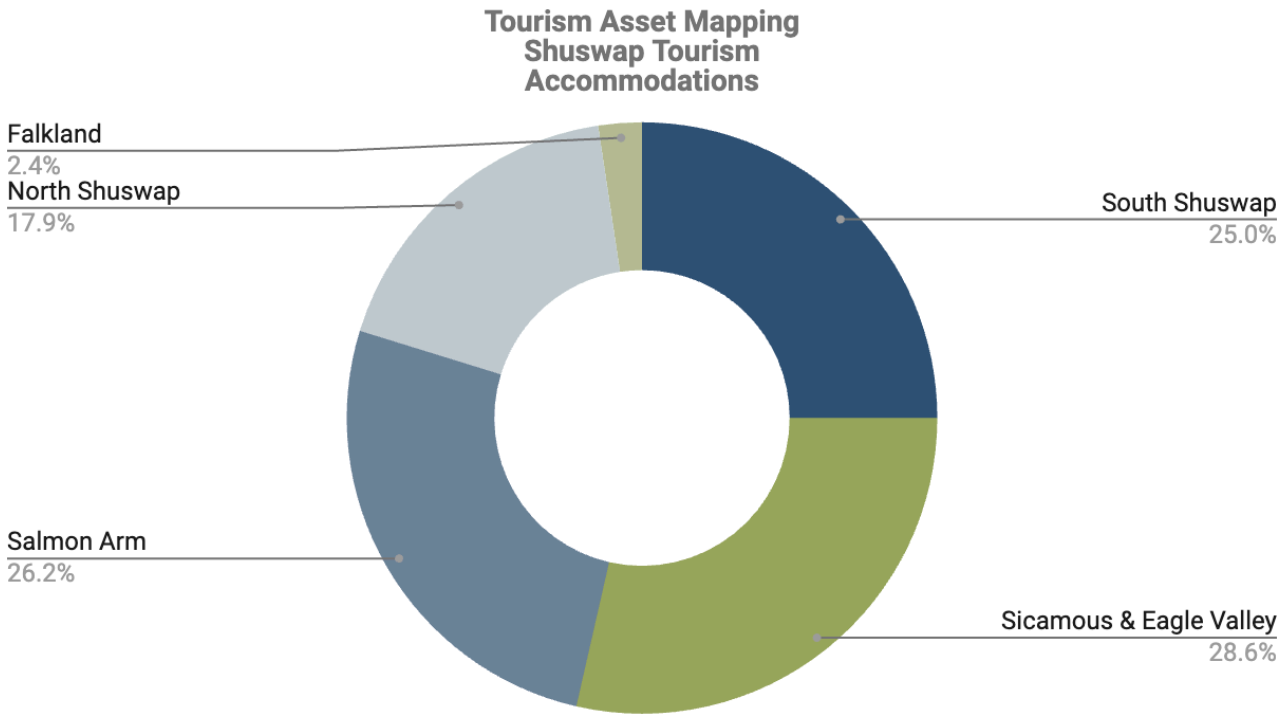
Accommodations

Apart from Falkland, tourism accommodation offerings are fairly evenly distributed across the remaining subregions.

Interestingly, Salmon Arm is home to most of the hotels and resorts, Sicamous and Eagle Valley is the prime location for houseboats, while South Shuswap has the largest supply of vacation rentals and cottages.

Product gaps are present in Falkland with only 2.4% of the region's accommodations, all of which are motels, RV parks, or campgrounds. Additionally, North Shuswap has a very low supply of hotel and resorts.

Table I2. Shuswap Tourism Asset Mapping - Accommodations



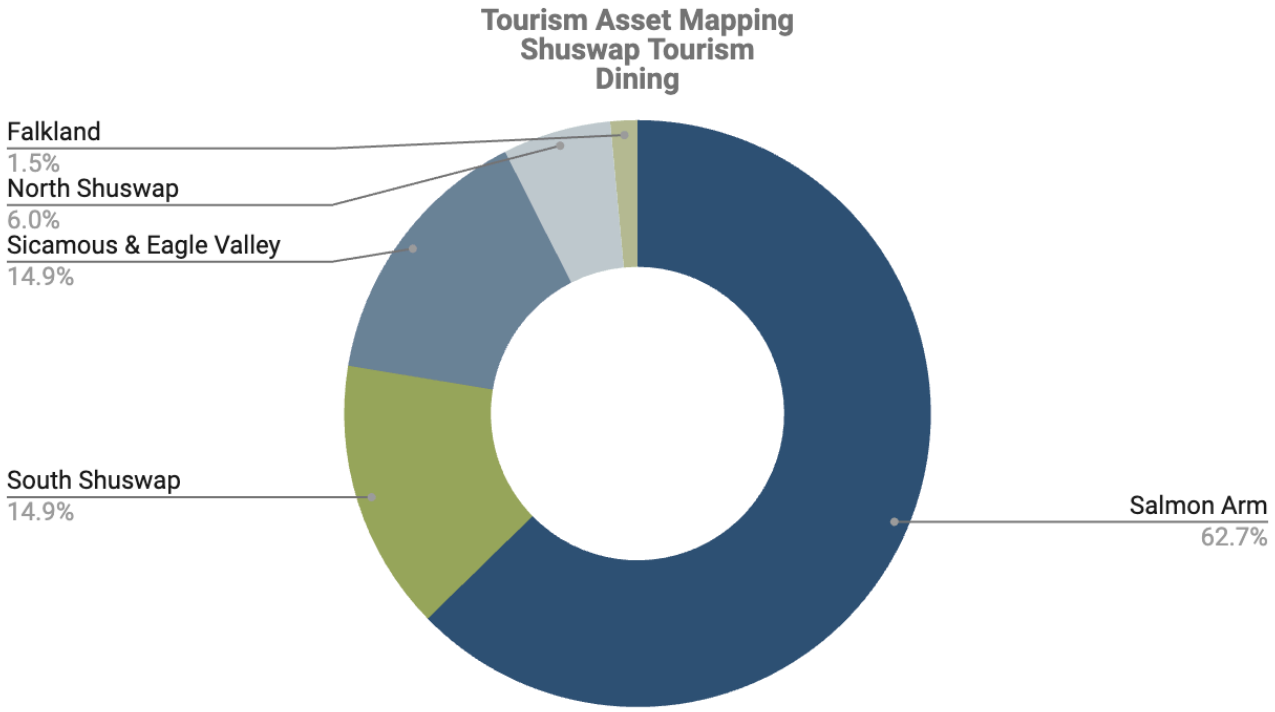
Dining

Looking at dining, over half of the offerings are located within Salmon Arm alone (62.7%).

Interestingly, Salmon Arm is the only subregion to offer dining options across all eight (8) categories and has the greatest number of cafes and bakeries, cideries, local food / farms, and restaurants of the subregions.

Some notable product gaps include the lack of dining options currently available in Falkland and North Shuswap, as well as the overemphasis on distilleries and pubs in Sicamous and Eagle Valley.

Table I3. Shuswap Tourism Asset Mapping - Dining



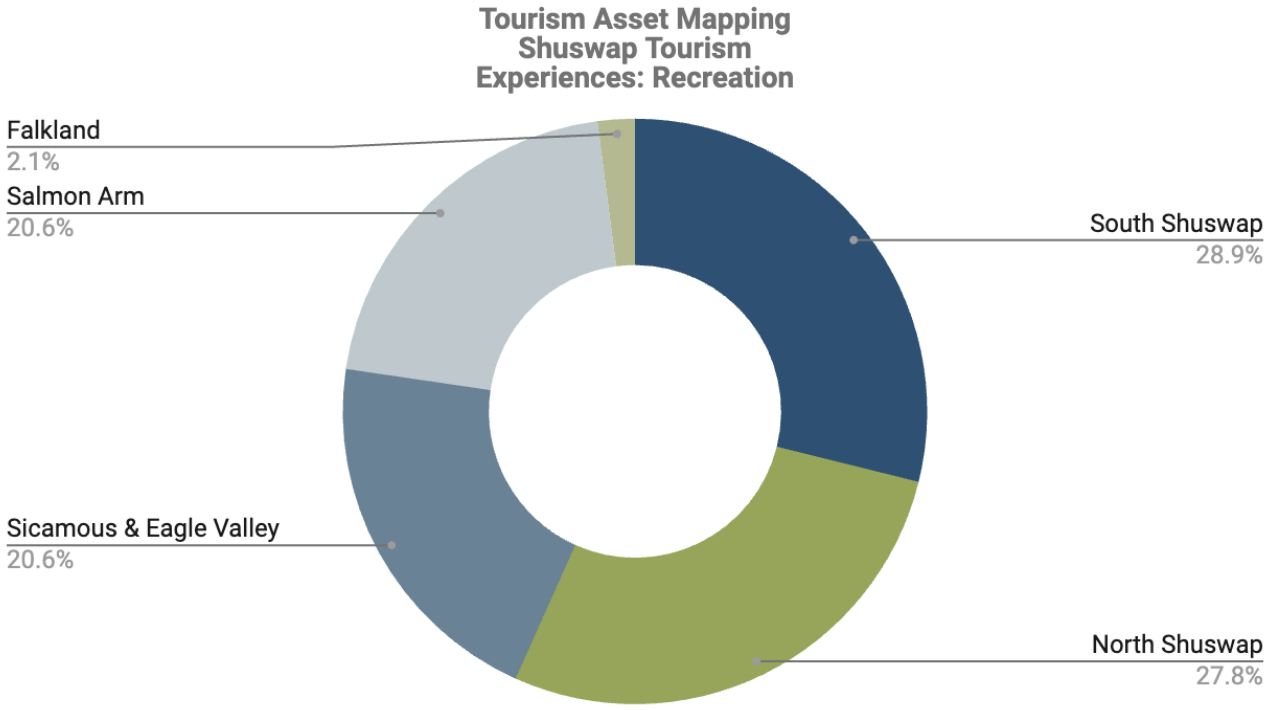
Recreation

Recreation experiences are similarly distributed across the subregions, apart of Falkland.

Due to trail locations, Salmon Arm is the prime location for biking, hiking, and horseback riding, while water-based activities are primarily found in North and South Shuswap, and Sicamous and Eagle Valley.

Notable product gaps include Falkland's limited recreation offerings, the lack of trail-based experiences outside of Salmon Arm, and the poor distribution of water-based activities across the subregions.

Table I4. Shuswap Tourism Asset Mapping - Recreation



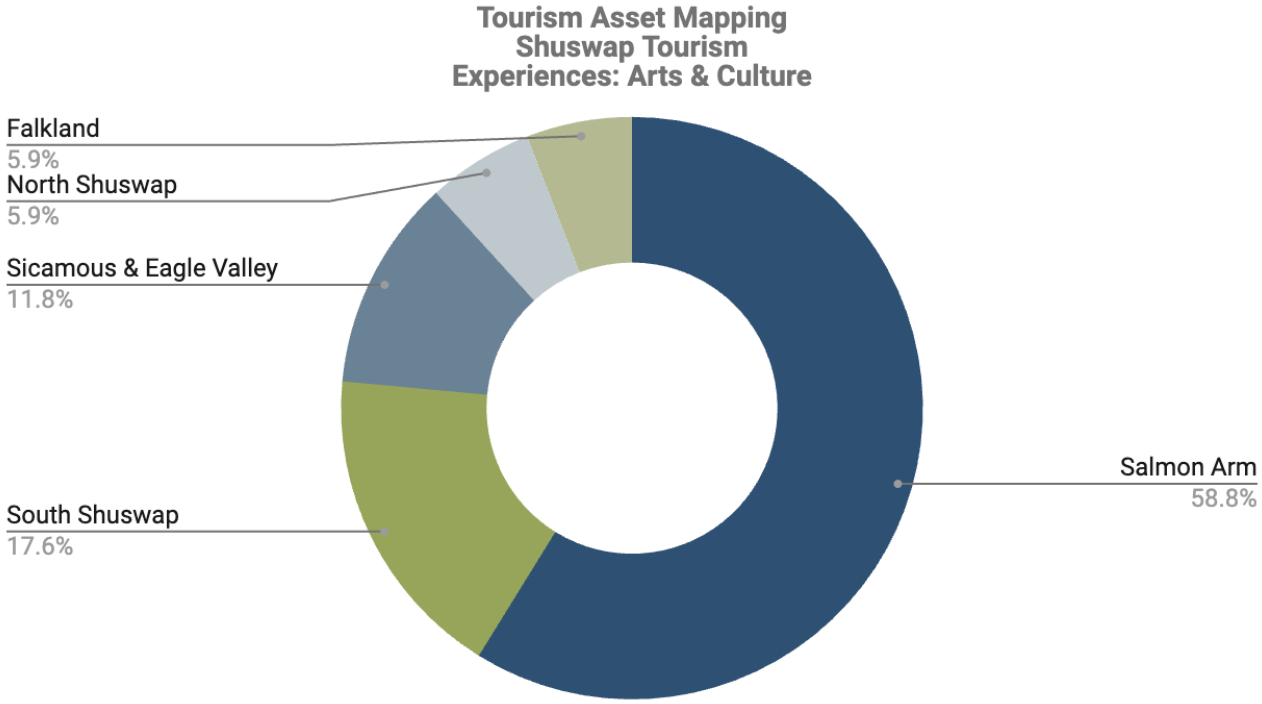
Arts & Culture

Salmon Arm, once again, leads with over half of the region's arts and culture offerings.

Interestingly, this is Falkland's strongest product category. Despite this, Salmon Arm is still home to the greatest portion of galleries and artisans, while Sicamous and Eagle Valley is tied with South Shuswap for Museums and heritage sites.

Notable gaps include the overall lack of Indigenous experiences, the lack of galleries and artisans in Falkland and Sicamous and Eagle Valley, and the lack of museums and heritage sites in North Shuswap.

Table I5. Shuswap Tourism Asset Mapping - Arts & Culture



Product Depth & Breadth

The Shuswap region has an opportunity to capitalize on its natural assets through the development of more organized outdoor recreation and adventure experiences, especially for the fall and winter season. General leisure activities as well as arts and culture are an advantage that should be front and centre in shoulder-season communications, especially to shore up the region's product position in the fall.

Key Insights

- The Shuswap region has something to offer in every season for every type of visitor.
- When compared to similar nearby destinations (ie. Vernon, Revelstoke, Golden, and Nelson), however, the Shuswap region falls in the middle of the pack.
- The region's strongest season is spring / summer, scoring the highest tourism offering index across the competitive set. Some of the more unique offerings provided in the Shuswap region during the spring / summer include horseback riding, farming / zoos, whitewater rating, axe throwing, go-karting, mini golf, and a waterpark.
- In contrast, the Shuswap region has the lowest tourism offering index of its competitors when it comes to the fall / winter season. Notably, the region is lacking fall / winter experiences like ice skating, fat biking, catskiing, heli skiing, and dog sledding, in addition to no skiing / snowboarding and weaker snowshoeing offerings when compared to its neighbours.
- With respect to product types, the Shuswap region scored the highest when it came to leisure and arts and culture tourism offerings but scored around the middle of the pack on recreation and adventure offerings. This is likely due to the region's beautiful natural environment (ie. parks, lakes, and beaches) and culture (ie. museums, galleries, theatres, farms, wineries / breweries) but lack of tourism infrastructure to fully take advantage of these assets.
- The Shuswap region has an opportunity to capitalize on its natural assets through the development of more organized outdoor recreation and adventure experiences, especially in the fall / winter season (ie. skiing / snowboarding, catskiing, heli skiing, fat biking, snowshoeing, wildlife watching, rock climbing). Moreover, through the addition of packages and partnerships, all stakeholders could benefit from year-round tourism demand.

A wide and deep bench of experiences provides greater visitor value, commands price premiums that benefit your local community, and strengthens your destination brand power. Noted and celebrated economist Michael Shuman focuses on the power of spending in locally-owned retail businesses and their ability to generate 2.5 times more benefits (taxes, income, jobs) than large outside-owned chains.[13] The Harvard Business Review published an exhaustive study of US cities proving that

[13] Shuman, YouTube, March, 2016

more small firms meant more jobs.[14] In fact, a focus on locally owned businesses can eliminate poverty and increase per capita income.[15]

Legend

	Product Exists	1 point
	Product Weakness	0.5 points
	No Product	0 points

Table 16. Shuswap Region Spring/Summer Tourism Products

Products	Travel Driver*	Shuswap	Vernon	Revelstoke	Golden	Nelson
Axe Throwing	No					
Beach/Marina	Yes					
Boating/Sailing	No					
Bowling	No					
Escape Room	No					
Events	Yes					
Farm/Ranch/Zoo	No					
Fishing	Yes					
Galleries	No					
Golf	Yes					
Go-Karting	No					
Hang/Paragliding	Yes					
Hiking Trails	Yes					
Horseback Riding	No					
Lakes/Rivers	Yes					
Mini Golf	No					
Motorized Rec.	Yes					
Mountain Biking	Yes					
Mountain Coaster	No					
Museums	No					
Paddling	No					
Parks	Yes					
Rafting	Yes					
Rock Climbing	Yes					
Rope Course	No					
Shopping	Yes					
Skydiving	Yes					
Snorkel/Scuba	Yes					
Spa/Wellness	Yes					
Theatres	No					
Waterpark	No					
Wildlife Watching	Yes					
Winery/Brewery	Yes					
Zipline	No					
TOTAL		**28.5**	**26**	**25**	**24.5**	**20.5**
INDEX		**100**	**91**	**88**	**86**	**80**

**Travel driver is defined as activity that would motivate a visitor to travel to a destination (ie. anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

[14] The Secret to Job Growth: Think Small, Glaeser and Kerr, Harvard Business Review, August 2010
[15] Federal Reserve of Atlanta, 2013

Table I7. Shuswap Region Fall/Winter Tourism Products

Products	Travel Driver*	Shuswap	Vernon	Revelstoke	Golden	Nelson
Axe Throwing	No					
Bowling	No					
Catskiing	Yes					
Dog Sledding	No					
Escape Room	No					
Events	Yes					
Fat Biking	Yes					
Galleries	No					
Heli Skiing	Yes					
Ice Skating	No					
Museums	No					
Shopping	Yes					
Ski/Snowboarding	Yes					
Sleigh Rides	No					
Snowmobiling	Yes					
Snowshoeing	No					
Spa/Wellness	Yes					
Theatres	No					
TOTAL		**10.5**	**15.5**	**15**	**11**	**12.5**
INDEX		**100**	**148**	**143**	**105**	**119**

**Travel driver is defined as activity that would motivate a visitor to travel to a destination (ie. anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

Table I8. Shuswap Region Recreation & Adventure Tourism Products

Products	Travel Driver*	Shuswap	Vernon	Revelstoke	Golden	Nelson
Axe Throwing	No					
Boating/Sailing	No					
Catskiing	Yes					
Dog Sledding	No					
Fishing	Yes					
Fat Biking	Yes					
Golf	Yes					
Go-Karting	No					
Hang/Paragliding	Yes					
Heli Skiing	Yes					
Hiking Trails	Yes					
Horseback Riding	No					
Ice Skating	No					
Motorized Rec.	Yes					
Mountain Biking	Yes					
Paddling	No					
Rafting	Yes					
Rock Climbing	Yes					
Rope Course	No					
Ski/Snowboarding	Yes					
Skydiving	Yes					
Snorkel/Scuba	Yes					
Snowmobiling	Yes					
Snowshoeing	No					
Zipline	No					
TOTAL		**16.5**	**19**	**19**	**19**	**16**
INDEX		**100**	**115**	**115**	**115**	**97**

**Travel driver is defined as activity that would motivate a visitor to travel to a destination (ie. anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

Table I9. Shuswap Region Arts & Culture Tourism Products

Products	Travel Driver*	Shuswap	Vernon	Revelstoke	Golden	Nelson
Events	Yes					
Farm/Ranch/Zoo	No					
Galleries	No					
Museums	No					
Shopping	Yes					
Theatres	No					
Winery/Brewery	Yes					
TOTAL		**7**	**7**	**6**	**4.5**	**5.5**
INDEX		**100**	**100**	**86**	**64**	**79**

**Travel driver is defined as activity that would motivate a visitor to travel to a destination (ie. anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

Table I10. Shuswap Region Leisure Tourism Products

Products	Travel Driver*	Shuswap	Vernon	Revelstoke	Golden	Nelson
Beach/Marina	Yes					
Bowling	No					
Escape Room	No					
Lakes/Rivers	Yes					
Mini Golf	No					
Mountain Coaster	No					
Parks	Yes					
Sleigh Rides	No					
Spa/Wellness	Yes					
Waterpark	No					
Wildlife Watching	Yes					
TOTAL		**8**	**8**	**7**	**7**	**5.5**
INDEX		**100**	**100**	**88**	**88**	**79**

**Travel driver is defined as activity that would motivate a visitor to travel to a destination (ie. anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

Competitor Price-Performance Analysis

Visitors don't make their travel purchase decisions based on price alone. Far from it. The experience and other benefits, which are often difficult to quantify, create value.

For the purposes of this report, this price-performance analysis compared the Shuswap region with competitors Vernon, Revelstoke, Golden, and Nelson in the following categories:

- Accommodations
- Restaurants
- Experiences

Table I11. Price Performance Value Map

Key Insights

- Tourism products within the Shuswap region offer a diverse range of visitor value. Notably, the majority of Shuswap region tourism products analyzed provide strong *Value for Money* meaning they are performing at high standards but could be dangerously underpriced at a time when input costs are soaring and margins are being squeezed from all sides.
- The goal is always to land in the coveted *Experiential* arena that allows operators to charge premium prices while still earning high customer praise. Service culture training, experience improvements, and yield pricing are key tactics in pushing local businesses into this space.
- Similar to the Shuswap region, tourism products from across the competitive set fall under various categories of visitor value.
- Golden and Vernon businesses seem to have their work cut out for them with too many offering poor to average value.
- Nelson and the Shuswap region are providing value for the money at least, but should envy the quality of the Revelstoke experience and the greater net margins that come with. In fact, with less effort, Revelstoke could make a clean sweep of the Experiential market.

Shuswap Region Accommodations, Restaurants, Experiences

Tourism products within the Shuswap region offer a diverse range of visitor value. Notably, the majority of Shuswap tourism products analyzed provide strong Value for Money meaning they are performing at high standards but could be dangerously underpriced at a time when input costs are soaring and margins are being squeezed from all sides.

The goal is always to land in the coveted Experiential arena that allows operators to charge premium prices while still earning high customer praise. Service culture training, experience improvements, and yield pricing are key tactics in pushing local businesses into this space.

Table I12. Shuswap Region Accommodations, Restaurants, Experiences

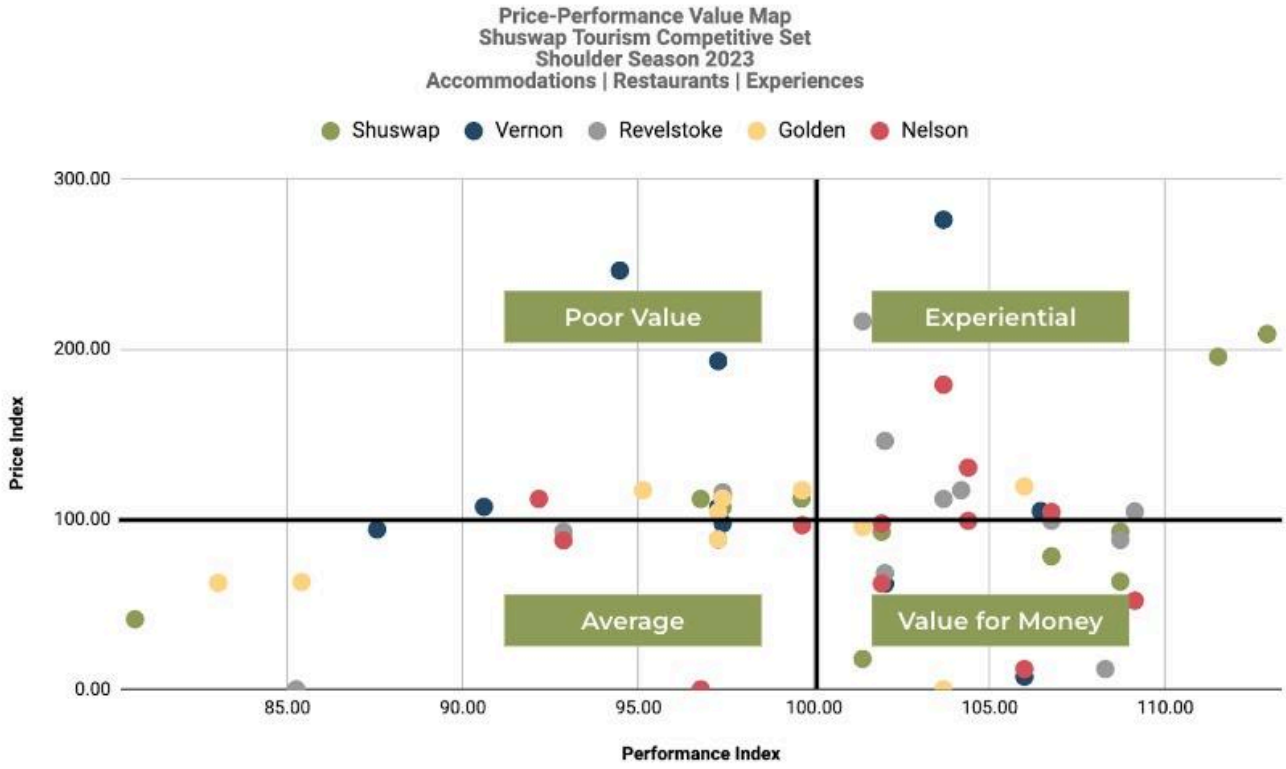
Shuswap Region Competitive Set: Accommodations, Restaurants, Experiences

Similar to the Shuswap region, tourism products from across the competitive set fall under various categories of visitor value.

Golden and Vernon businesses seem to have their work cut out for them with too many offering poor to average value.

Nelson and the Shuswap region are providing value for the money at least, but should envy the quality of the Revelstoke experience and the greater net margins that come with. In fact, with less effort, Revelstoke could make a clean sweep of the Experiential market.

Table I13. Shuswap Region Competitive Set: Accommodations, Restaurants, Experiences



Shuswap Region Competitive Set: Accommodations

Looking at accommodations, Golden and Vernon remain in difficult positions, with many offerings serving only poor or average value to visitors.

Shuswap, Nelson, and Revelstoke, on the other hand, compete primarily in the value for money and experiential categories. Shuswap is at risk of falling behind, however, as one of its properties is hovering around the performance index while another has the lowest performance rating of the competitive set.

It is important for these businesses to remain resilient against pricing wars and focus, rather, on making service improvements towards becoming experiential offerings.

Table I14. Shuswap Region Competitive Set: Accommodations

Shuswap Region Competitive Set: Restaurants

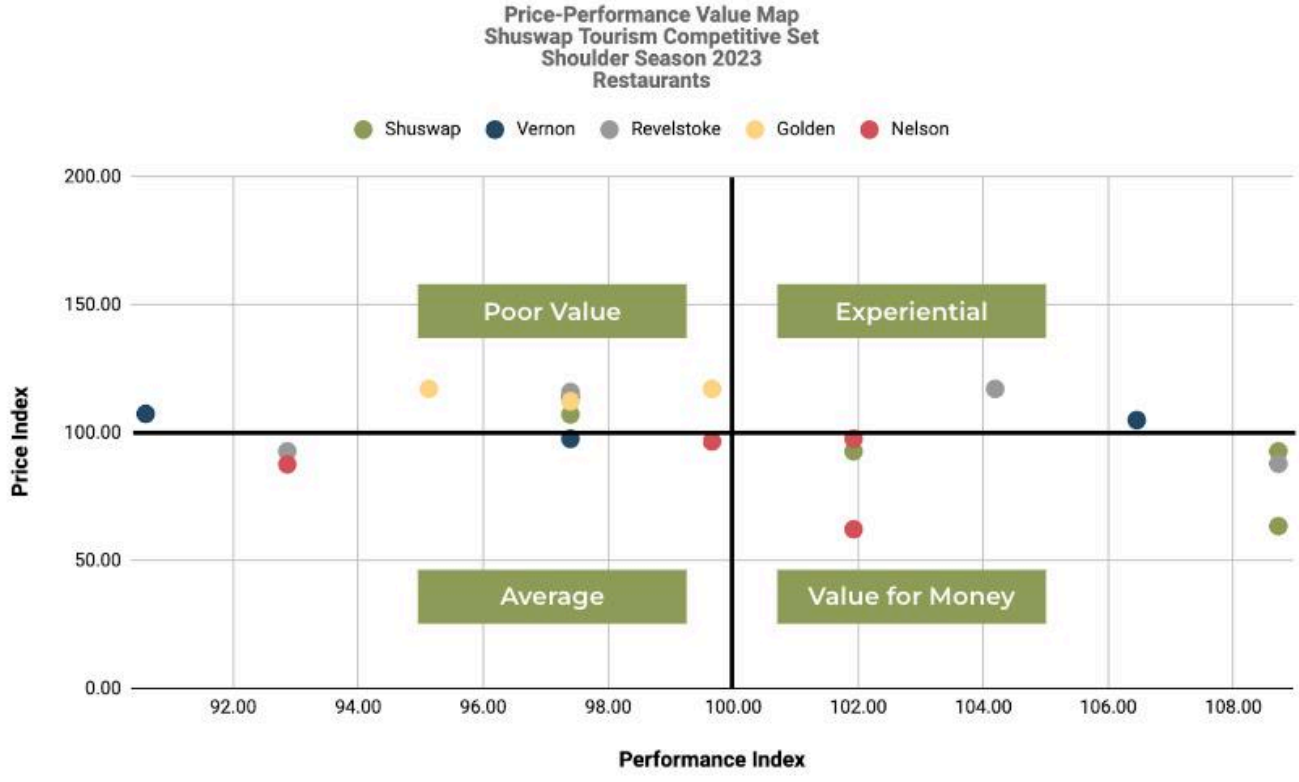
Interestingly, restaurants across the competitive set all fall relatively close to the price index. This means that, more than anything else, properties are competing on performance.

Golden and Vernon once again fall behind with only one property, each, falling above the performance index.

Interestingly, Revelstoke and Nelson struggle in this category more than others as half of their properties fall below the performance index.

The Shuswap region outperforms the rest with three (3) properties falling above the performance index. There remains room, however, to make moves towards more experiential offerings.

Table I15. Shuswap Region Competitive Set: Restaurants



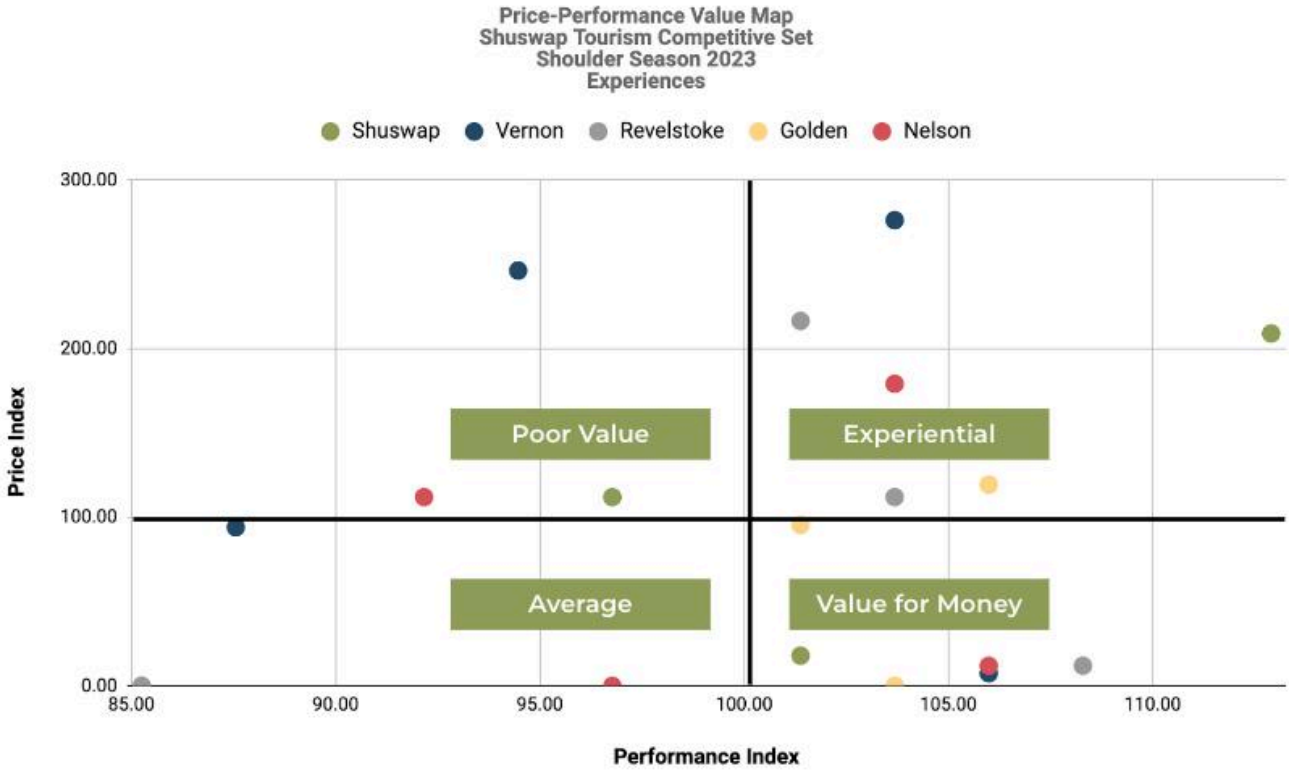
Shuswap Region Competitive Set: Experiences

In terms of experience offerings, the competitive set is highly dispersed with most destinations competing in at least three (3) value categories.

Golden leads this category, overall, with all of its offerings falling above the performance index, while Revelstoke remains in strong positioning leading on experiential offerings.

Similar to Vernon and Nelson, the Shuswap region's experiences compete in every value category. Notably, however, two (2) Shuswap offerings fall low on the price index meaning that the region is likely missing out on potential revenue.

Table I16. Shuswap Region Competitive Set: Experiences



Appendix J. Destination Growth Analysis

At any point in time, a destination has an existing pool of current and prospective visitors who make up current market demand and a potential pool of prospective visitors who provide the opportunity to grow market demand. Understanding your destination's ceiling for growth is not only of great strategic importance, it is also essential to making sure that growth doesn't surpass levels that the local environment, community, and businesses can support.

Calculating a Market Development Index (MDI) helps destination managers understand the evolution of a market or product sectors, and to measure its potential for future growth. By looking at the destination's current market demand in relation to its market potential, destination managers are offered important signals that can tell them when to invest or more importantly, when not to.

Projecting a destination's future market share is complex, and outside of large DMOs with sizable market research budgets and professional teams at the ready, most DMOs never attempt it. But using simple marketing logic, we can develop a reasonable estimate. Using the destination marketing mix (ie. promotion x product x price x place x service), we can set a share development path that asks potential visitors (or failing that, asks local destination players themselves) to rate a destination's performance along this sequence of market share metrics. Measuring current performance against a desired level of response provides a Share Development Index (SDI) that can tell us what marketing mix strategies are needed to realize the share growth we want.

Key Insights

- The Shuswap region's destination growth potential and future competitiveness rests on the development of its shoulder-season hiking, culinary, culture, biking, and birding experiences.
- Compression in the local accommodation sector, elevated climate-related risks, water shortages, and intense pressure on local resources suggest that future investments in the summer lakeside lifestyle would only yield diminishing returns. Market-based management principles dictate that the Shuswap region should dramatically reduce its marketing and destination development investments focused on building summer demand.
- A popular idea that could alleviate this compression is building more public boat dock infrastructure to spread the tourism base around to less busy, less explored arms of the lake. The proposition is certainly attractive to tourism-related businesses in Scotch Creek and Sunnybrae, for example. Success would ease boat and houseboat congestion on the lake, and most likely, spark private-sector investments in sorely needed accommodations.

Table J1. Managing Destination Growth Potential

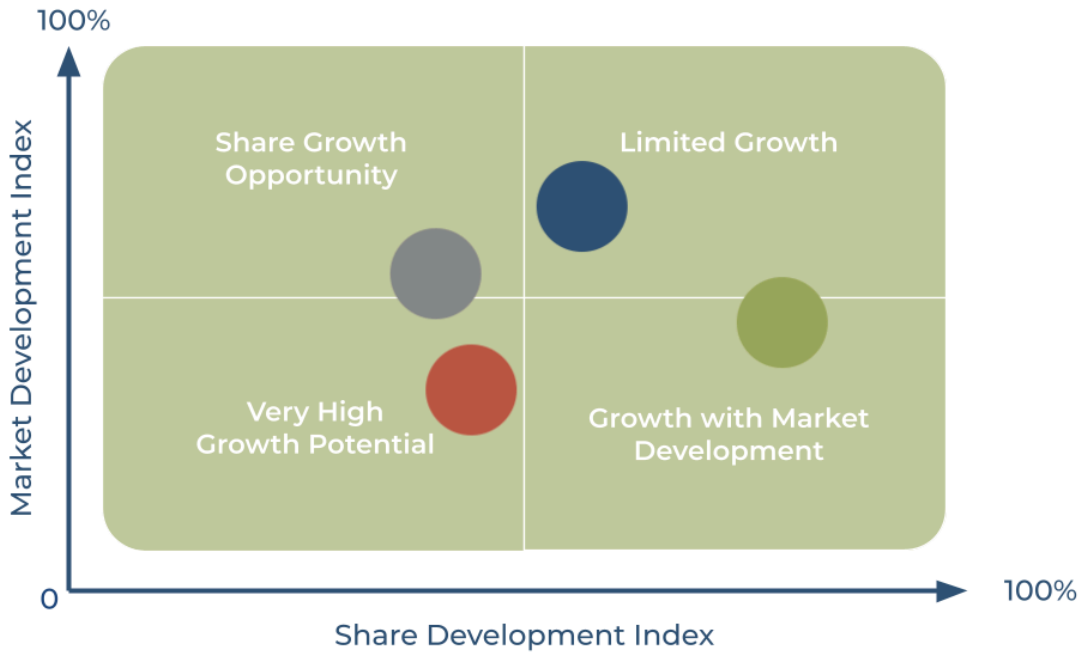


Table J2. Shuswap Region Destination Growth Potential

Table J3. Shuswap Region Market Development Index & Share Development Index

	Market Development Index	Share Development Index
Hiking	19.85	82.65
Culinary	19.03	64.71
Culture	17.44	67.50
Biking	11.28	63.15
Lakeside	97.09	96.20
Sledding	97.09	110.18
Birding	10	52
Motorcycle Touring	76.9	73.4

Shuswap Region Market Demand

Table J4. Shuswap Region Overnight Market Demand (2018)

Thompson Okanagan*	Shuswap (Domestic)	Shuswap (International)	Shuswap (Total)	Shuswap Market Share
4,512,529	748,110	182,720	930,830	21%

Source: Thompson Okanagan Regional Tourism Development Strategy, April 2021

Table J5. Shuswap Region Overnight Market Demand by Trip Anchor

Shuswap Overnight Visits	Hiking or Nature Walk (18%)*	Trying Local Food and Drink (15%)	Culture (11%)	Wellness (7%)	Biking (4%)
930,830	167,549	139,625	102,391	65,158	37,233

**Activities important enough to base an entire trip around. All activity rates from Canada Global Tourism Watch, October 2021.*

Shuswap Region Market Potential

Table J6. Shuswap Region Overnight Market Potential 2023 (Forecast)

	Overnight Visits**	Thompson Okanagan Share	Thompson Okanagan Overnight Visits	Shuswap Overnight Visits (21% share)
BC	9,855,000	29%	2,857,950	600,170
Alberta	2,609,000	16%	417,440	87,662
Ontario	848,000	31%	262,880	55,205
International (US, China, SK)	1,007,000	13%	130,910	27,491
Total	**14,319,000**		**3,669,180**	**770,528**

Based on current market demand share to Shuswap of 21%.
***Destination BC forecast 2023 overnight leisure visits. Total BC (2.6M), Alberta (9.9M) and Ontario (848K)*

Table J7. Shuswap Region Market Potential 2023 by Trip Anchor (Forecast)

	Market Potential (Overnight)	Hiking or Nature Walk (23%)***	Trying Local Food and Drink (20%)	Culture (16%)	Wellness (12%)	Biking (9%)
BC	2,857,950	514,431	428,693	314,375	200,057	114,318
Alberta	417,440	75,139	62,616	45,918	29,221	16,698
Ontario	262,880	47,318	39,432	28,917	18,402	10,515
International (US, China, SK)	130,910	23,564	19,637	14,400	9,164	5,236
Total	**3,669,180**	**843,911**	**733,836**	**587,069**	**440,302**	**330,226**

Based on current market demand share to Shuswap of 21% (Blended International and Domestic).

****Activities important enough to base an entire trip around. All activity rates from Canada Global Tourism Watch, October 2021, with incremental 5% added to reflect future growth.*[16]

Market Development Index

Table J8. Shuswap Region Market Development Index

	Leisure	Hiking or Nature Walks	Trying Local Food and Drink	Culture	Wellness	Biking
Current Market Demand	930,830	167,549	139,625	102,391	65,158	37,233
Market Potential	3,669,180	843,911	733,836	587,069	440,302	330,226
MDI	**25.37%**	**19.85%**	**19.03%**	**17.44%**	**14.80%**	**11.28%**
	Lakeside Lifestyle*	Snowmobiling**	Birding***	Motorcycle Touring		
Current Market Demand	431,800	14,100	6,600	30,645		
Market Potential	444,754	14,523	66,000	39,838		
MDI	**97.09%**	**97.09%**	**10.00%**	**76.92%**		

**Total 2019 visitation minimum one night stay between June and September equals 539,750. Assumes 80% visit for lakeside lifestyle. Includes domestic and international overnight visitors. Market potential reflects intense local compression during peak season as accommodations are at or over capacity during the high season with no new builds in the region. Shuswap Community Research, Year in Review, Thompson Okanagan Tourism Association, 2019.*
***Economic Impact Analysis, Eagle Valley Snowmobile Club, 2021. Market potential reflects interview data revealing that staging areas are at capacity and overnight visitors being directed to Revelstoke.*
****Columbia Shuswap ranks in fifth place in BC, counting 339 bird species after nearly 66,000 checklists submitted (eBird.org, 2023). Assume 10% of these were made by birders who stayed at least one night. Market potential estimated at 10x current demand.*
*****Assumes domestic and U.S. market primary rider markets. U.S. overnight visits to Shuswap between June and September estimated to account for roughly 75% of market or 73,148 overnight U.S. visits. Total 2019 visitation minimum one night stay between June and September equals 539,750. Assume riders account for 5% of overnight visitor volume. Market potential assumes 3% increase to match Canadian growth rate for Canadian sales.*

[16] Sources: Shuswap Community Research, Year in Review, Thompson Okanagan Tourism Association, 2019 | Thompson Okanagan Regional Tourism Development Strategy, April 2021 | Thompson Okanagan, Regional Tourism Profile, Destination BC, 2017.

Share Development Index

Forces that Shape Market Growth: Share Performance Metrics

- Awareness: Visitors know your destination offers it
- Attractiveness: Visitors are interested in doing the activity
- Affordable: The price is acceptable
- Available: The destination has a strong offering
- Accessible: Transportation and infrastructure are in place. Low barriers to consumer entry.
- Performance: Visitor satisfaction with promised experience

Destination Response Scale

- Extremely - 5
- Very - 4
- Moderately - 3
- Slightly - 2
- Not at All - 1

Hiking

Table J9. Shuswap Region Current vs. Potential Market Share Index: Hiking

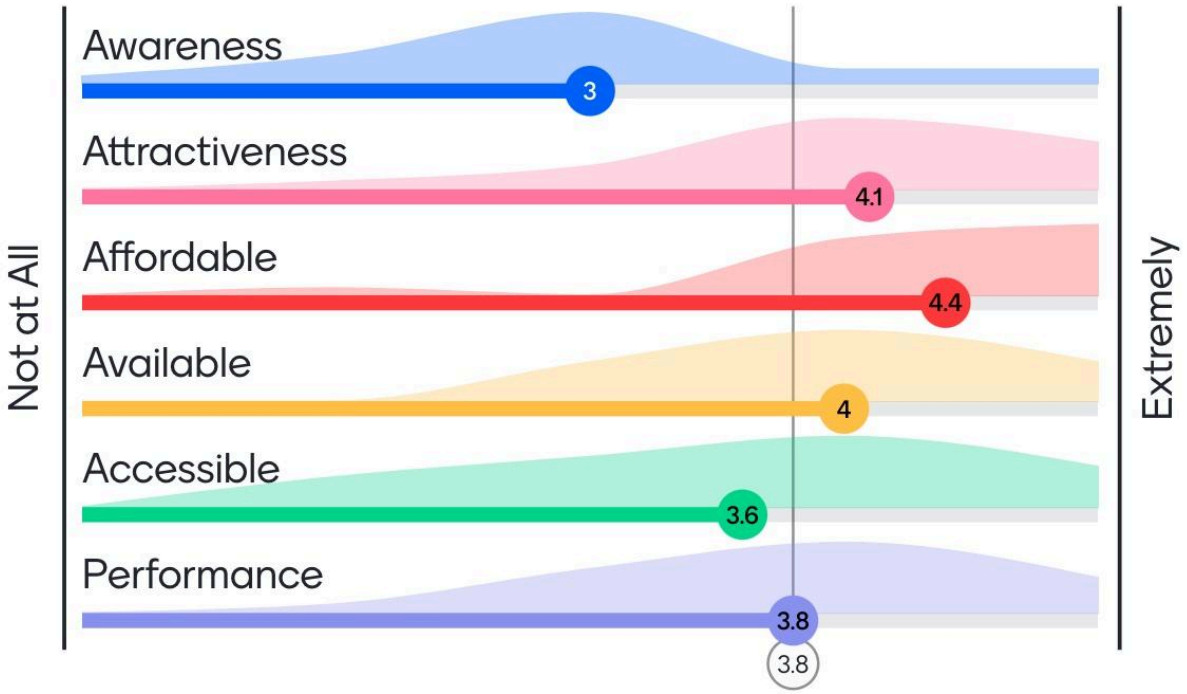
Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	60.0%	65.00%	-5.00%	Marketing
Attractiveness	82.0%	87.00%	-5.00%	Marketing
Affordable	88.0%	88.00%	0.00%	N/A
Available	80.0%	80.00%	0.00%	Develop
Accessible	72.0%	72.00%	0.00%	Develop
Performance	76.0%	80.00%	-4.00%	Develop
MARKET SHARE INDEX	**18.95%**	**22.93%**	-3.98%	
SHARE DEVELOPMENT INDEX	**82.7**			

Table J10. Shuswap Region Share Performance Metrics: Hiking[17]

Share Performance Metric	Insight
Awareness	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%. The Thompson Okanagan has a 29% share of BC resident overnight visits and 16% of Alberta overnight, but they stay longer (2.9 vs 3.3 nights).
Attractiveness	18% state hiking or walking in nature is their main trip purpose. While on vacation, 48% of BC residents are keen compared to 43% Albertans, and it ranks in the top 5 of activities for Albertans (DBC, 2023).
Affordable	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available	AllTrails shows about 185 curated trails within the Shuswap region. About half are rated of moderate difficulty, with balance split between easy and hard. Nearly 60% are rated 4 stars and above. Almost all have light to moderate use with 2 reported as heavily used: Enderby Cliffs and Margaret Falls. About half are hiking trails, with balance split between walking and running trails (AllTrails, October 2023). Interview needed with Shuswap Trail Alliance (TBC), but told they plan using Trailforks so this app should also be reviewed and hiking/biking trails analyzed. Key initiative: Build out a destination trail multi-day hike to Cinnemousun Narrows Provincial Park (see shuswaptrails.com).
Accessible	The Shuswap region is in the centre of BC and sees over 4 million travellers directly through the region on the Trans-Canada Hwy and Hwy 97B, almost equidistant from Calgary and Vancouver. This offers a tremendous opportunity to engage with tourists that may be travelling to either destination.
Performance	AllTrails shows about 185 curated trails within the Shuswap region. Nearly 60% are rated 4 stars and above. Tourism Sentiment Score (TSI) 32 (Hiking and Rock Climbing) is in the 75th percentile for the country and contributes about 30% to the destination score.

[17] Sources: Economic Impact Analysis: Sicamous Snowmobiling, Eagle Valley Snowmobile Club, MNP, 2021 | Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023 | AllTrails Website, October 15, 2023

Figure J1. Share Performance Rankings: Hiking



Source: Shuswap Destination Brand Audit Workshop, 2023

Culinary

Table J11. Shuswap Region Current vs. Potential Market Share Index: Culinary

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	46.0%	51.0%	-5.0%	Marketing
Attractiveness	66.0%	71.0%	-5.0%	Marketing
Affordable	58.0%	58.0%	0.0%	Pricing
Available	50.0%	55.0%	-5.0%	Develop
Accessible	54.0%	59.0%	-5.0%	Develop
Performance	64.0%	69.0%	-5.0%	Develop
MARKET SHARE INDEX	**3.04%**	**4.70%**	**-1.7%**	
SHARE DEVELOPMENT INDEX	**64.7**			

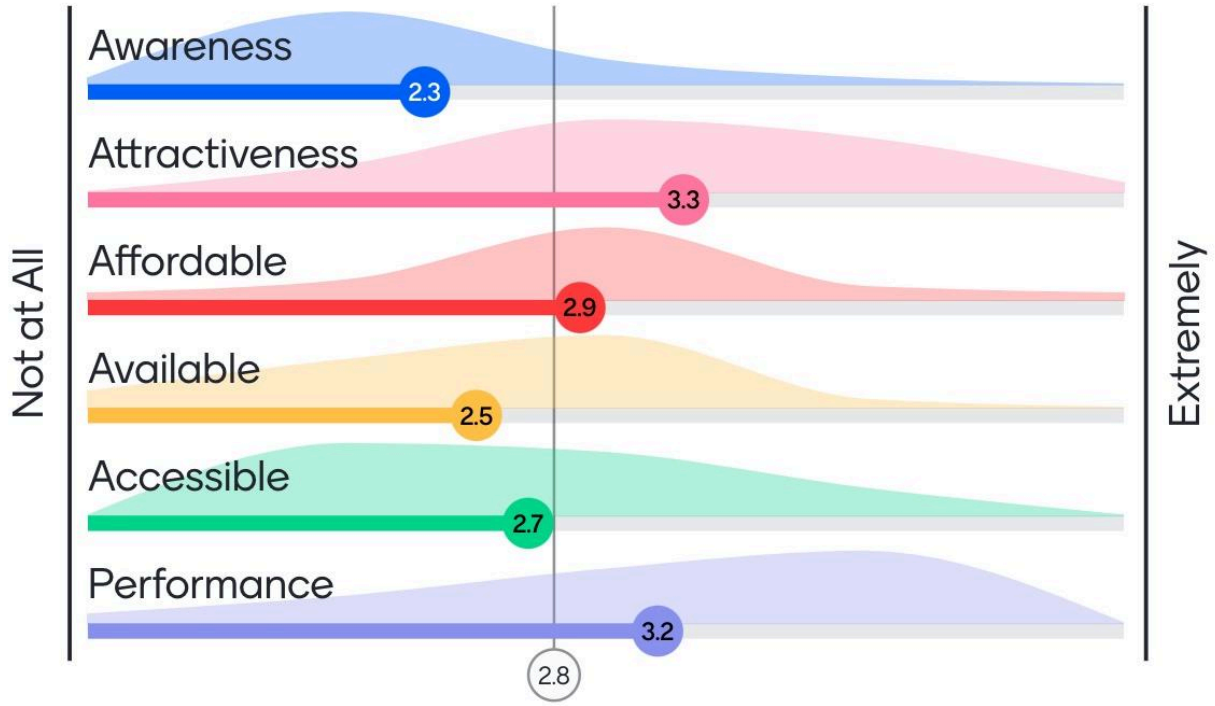
Table J12. Shuswap Region Share Performance Metrics: Culinary[18]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	Trying local food and drink is the main driver (15%), while breweries and wineries (11%) and local food and drink festivals and events (11%) were also strong. Ranked as a top 5 activity for Albertans and BC residents.
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available		Farm Gate Project aggregating local experiences and retailers. Region has increasingly famous Timber restaurant with celebrated Chef Chris Whittaker who is eager to lead events, fundraisers and special programming ie. shop and cook with Chef Margaret McCormick and Nigel Collett who operate @tasteoftheshuswap and have strong ideas, experience, and followings.

[18] Sources: Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023

Share Performance Metric	Measure	Insight
Accessible		The Shuswap region is in the centre of BC and sees over 4 million travellers directly through the region on the Trans-Canada Hwy and Hwy 97B, almost equidistant from Calgary and Vancouver. This offers a tremendous opportunity to engage with tourists that may be travelling to either destination.
Performance	NPS (by Province), Relative Performance, TSI	NPS for BC is 2nd in country (no number value given). TSI 32 (Restaurants and Dining) in 65th percentile for the country and contributes about 12% to destination score. TSI 23 (Wineries and Vineyards) are in the 60th percentile for the country and contributes about 1% to destination score.

Figure J2. Share Performance Rankings: Culinary



Source: Shuswap Destination Brand Audit Workshop, 2023

Culture

Table J13. Shuswap Region Current vs. Potential Market Share Index: Culture

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	58.0%	63.0%	-5.0%	Marketing
Attractiveness	70.0%	75.0%	-5.0%	Marketing
Affordable	64.0%	64.0%	0.0%	Pricing
Available	54.0%	59.0%	-5.0%	Develop
Accessible	62.0%	67.0%	-5.0%	Develop
Performance	64.0%	69.0%	-5.0%	Develop
MARKET SHARE INDEX	**5.57%**	**8.25%**	**-2.68%**	
SHARE DEVELOPMENT INDEX	**67.5**			

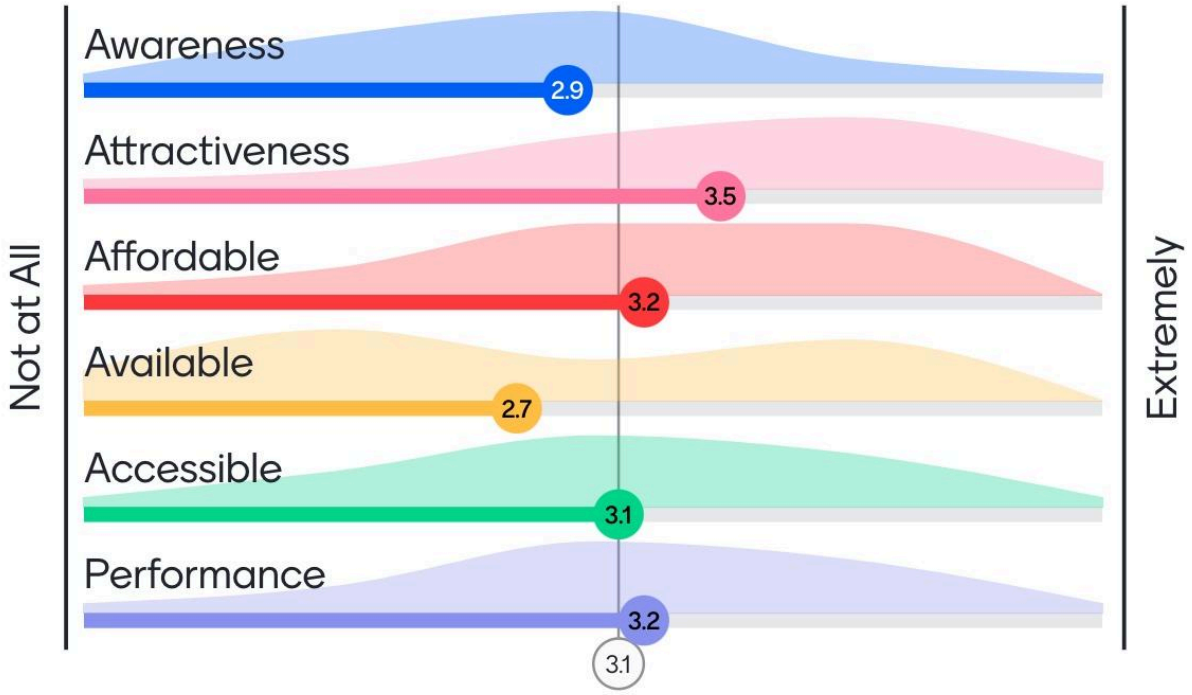
Table J14. Shuswap Region Share Performance Metrics: Culture[19]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	Exploring local history and heritage (19%), catching live shows (12%), galleries and museums (11%), music festivals (11%), cultural festivals (9%), and exploring Indigenous culture (7%) will themselves serve as the main reason to book a trip to the region. Interest in these is 2-3x greater when on vacation and looking for something to do.
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available		Annual Roots and Blues Festival is a main summer draw welcoming approximately 30,000 annually to Salmon Arm. Other events include North Shuswap Winter Festival and Adams River Sockeye Salmon Run. (See new Salmon Arm Cultural Master Plan.) Interviews revealed a very strong local Jazz scene (see Salmon Arm Jazz Club) that prompts envy and surprise from VFR (could be promising strength given Vancouver's "no fun city" reputation and ongoing downtown safety issues).

[19] Sources: Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023

Share Performance Metric	Measure	Insight
Accessible		The Shuswap region is in the centre of BC and sees over 4 million travellers directly through the region on the Trans-Canada Hwy and Hwy 97B, almost equidistant from Calgary and Vancouver. This offers a tremendous opportunity to engage with tourists that may be travelling to either destination.
Performance	NPS (by Province), Relative Performance, TSI	NPS for BC is 2nd in country (no number value given). TSI 55 (Festivals and Events) is in the 90th percentile for the country and contributes about 38% to destination score.

Figure J3. Share Performance Rankings: Culture



Source: Shuswap Destination Brand Audit Workshop, 2023

Biking & Cycle Touring

Table J15. Shuswap Region Current vs. Potential Market Share Index: Biking and Cycle Touring

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	46.0%	51.0%	-5.0%	Marketing
Attractiveness	62.0%	67.0%	-5.0%	Marketing
Affordable	62.0%	62.0%	0.0%	N/A
Available	52.0%	57.0%	-5.0%	Develop
Accessible	52.0%	57.0%	-5.0%	Develop
Performance	50.0%	55.0%	-5.0%	Develop
MARKET SHARE INDEX	**2.39%**	**3.79%**	**-1.4%**	
SHARE DEVELOPMENT INDEX	**82.7**			

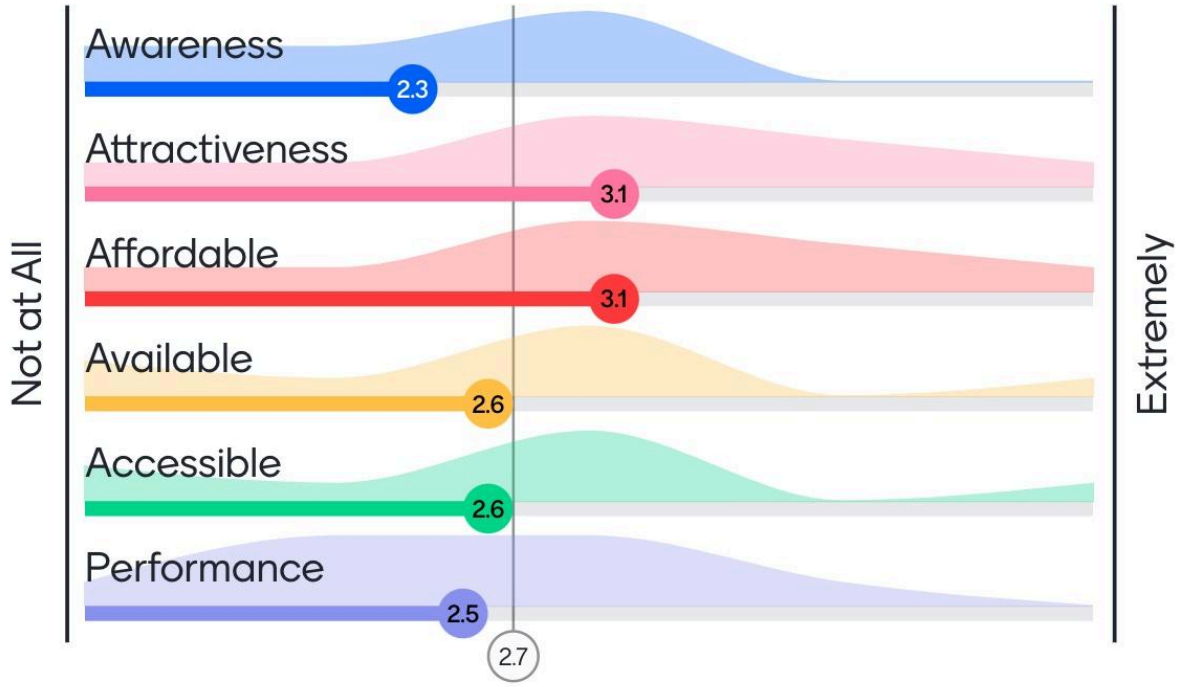
Table J16. Shuswap Region Share Performance Metrics: Biking and Cycle Touring[20]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	While local or regional statistics are unavailable, cycle tourism is important enough for about 9% of respondents surveyed to base an entire trip around (Canada Global Tourism Watch, 2021).
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available	AllTrails	Rail Trail development from Shuswap region to South Okanagan (ie. Sicamous to Armstrong...to Osoyoos). Groundwork has also commenced in Enderby (DBC, 2019). AllTrails reports about 45 mountain biking trails in the Shuswap region. Most are rated moderate with roughly half ranked 4 stars or above. Nearly all receive light to moderate use. Interview needed with Shuswap Trail Alliance (TBC), but told they plan using Trailforks so this app should also be reviewed and hiking/biking trails analyzed.

[20] Sources: Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023 | AllTrails Website, October 15, 2023

Share Performance Metric	Measure	Insight
Accessible		Shuswap Trail Alliance identified need for clear roles / policies on use to avoid conflicts.
Performance	NPS (by Province), Relative Performance, TSI	NPS for BC is 2nd in country (no number value given). TSI 30 (Biking and Cycling) in 90th percentile for country and contributes about 1% to destination score.

Figure J4. Share Performance Rankings: Biking and Cycle Touring



Source: Shuswap Destination Brand Audit Workshop, 2023

Birding (Scenario)

Table J17. Shuswap Region Current vs. Potential Market Share Index: Birding

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	35.0%	50.0%	-15.0%	Marketing
Attractiveness	60.0%	65.0%	-5.0%	Marketing
Affordable	70.0%	70.0%	0.0%	N/A
Available	65.0%	70.0%	-5.0%	Develop
Accessible	65.0%	70.0%	-5.0%	Develop
Performance	70.0%	75.0%	-5.0%	Develop
MARKET SHARE INDEX	**4.35%**	**8.36%**	**-4.0%**	
SHARE DEVELOPMENT INDEX	**52.00**			

Table J18. Shuswap Region Share Performance Metrics: Birding[21]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	Shuswap region ranks in fifth place in BC, counting 339 bird species after nearly 66,000 checklists submitted (eBird.org, 2023).
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available		Shuswap has a well developed Bird Trail product and a wide variety of species to watch for (see bcbirdtrail.ca).

[21] Sources: Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023 | eBird Canada Website, October 15, 2023 | The BC Bird Trail Website, October 15, 2023

Share Performance Metric	Measure	Insight
Accessible		While still early in its development, Shuswap region and Sicamous birding sites are well marked and easily accessible within and just outside urban areas.
Performance	NPS (by Province), Relative Performance, TSI	Regional insight unavailable; however, Tourism Sentiment Index (TSI) score of 20 (Nature Photography) in 35th percentile for the country and contributes about 16% to destination score.

Motorcycle Touring (Scenario)

Table J19. Shuswap Region Current vs. Potential Market Share Index: Motorcycle Touring

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	35.0%	40.0%	-5.0%	Marketing
Attractiveness	60.0%	65.0%	-5.0%	Marketing
Affordable	30.0%	30.0%	0.0%	N/A
Available	70.0%	70.0%	0.0%	Develop
Accessible	30.0%	33.0%	-3.0%	N/A
Performance	60.0%	60.0%	0.0%	N/A
MARKET SHARE INDEX	**0.79%**	**1.08%**	**-0.3%**	
SHARE DEVELOPMENT INDEX	**73.43**			

Table J20. Shuswap Region Share Performance Metrics: Motorcycle Touring[22]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	In 2023, the projected revenue in the Motorcycles market in Canada was expected to reach US$815.30M. The market is anticipated to experience a steady annual growth rate (CAGR 2023-2028) of 2.80%, resulting in a projected market volume of US$936.20M by 2028. The Canadian motorcycle market is experiencing a surge in demand for electric motorcycles, driven by increasing environmental consciousness and government incentives. Additionally, there is a trend among younger consumers to embrace the motorcycle culture and lifestyle, further driving the demand for motorcycles in the country (Statista, Website, December 2023).
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.

[22] Sources: Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023 | Destination BC Provides Over $6 Million for Collaborative Tourism Marketing Ventures Throughout the Province, April 2023 | Riding The Shuswap Area of British Columbia, Canada, Rider Magazine, October 15, 2023 | Statista Motorcycles Canada, October 15, 2023

Share Performance Metric	Measure	Insight
Available		The Shuswap region is a popular area for riding and boasts strong assets. There's Canadian Motorcycle Adventure Tours and the DREAMCYCLE MOTORCYCLE MUSEUM. This one of a kind, 1st class museum features over 100 vintage and collector motorcycles from around the world, and includes Sprokkets Cafe. Destination BC is investing in motorcycle touring along Route 16. Northern BC communities are calling on motorcycle enthusiasts to tour the Highway 16 corridor from Mt. Robson to Prince Rupert. The initiative has been so successful that new tourism experiences have been developed to capitalize on the momentum of this route (Destination BC, April, 2023).
Accessible		Motorcycle and gear cost, licensing, training and negative perceptions around safety present barriers to entry that slow growth.
Performance	NPS (by Province), Relative Performance, TSI	Regional insights unavailable

Nordic & Snowshoeing

Table J21. Shuswap Region Current vs. Potential Market Share Index: Nordic and Snowshoeing

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	52.0%	57.0%	-5.0%	Marketing
Attractiveness	60.0%	65.0%	-5.0%	Marketing
Affordable	66.0%	66.0%	0.0%	N/A
Available	48.0%	48.0%	0.0%	Develop
Accessible	46.0%	51.0%	-5.0%	Develop
Performance	48.0%	53.0%	-5.0%	Develop
MARKET SHARE INDEX	**2.18%**	**3.17%**	**-1.0%**	
SHARE DEVELOPMENT INDEX	**68.8**			

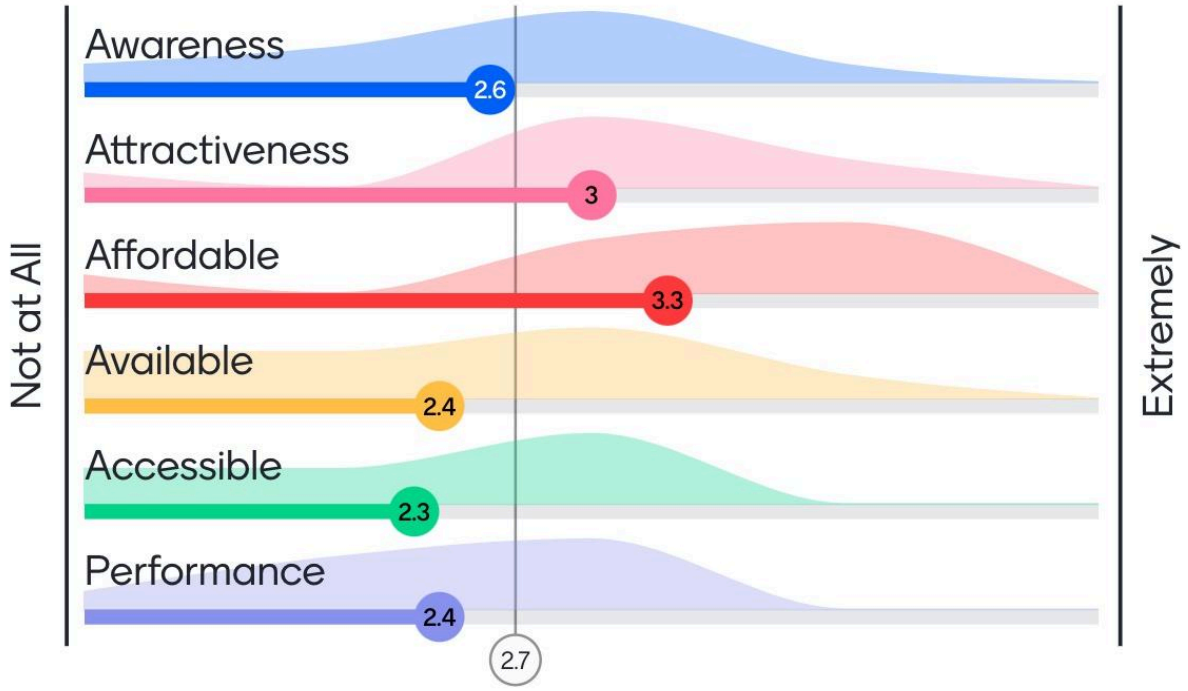
Table J22. Shuswap Region Share Performance Metrics: Nordic and Snowshoeing[23]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	As a driver, 3% would book a trip just to snowshoe or cross-country ski. While on their trip though, interest climbs to 11%.
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available		Larch Hills has the highest commercial potential for Nordic skiing, light touring, ski touring and snowshoeing. Otherwise, there is limited land available in-region that's free of conflicts with snowmobilers.

[23] Sources: Economic Impact Analysis: Sicamous Snowmobiling, Eagle Valley Snowmobile Club, MNP, 2021 | Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023 | AllTrails Website, October 15, 2023

Share Performance Metric	Measure	Insight
Accessible		The Shuswap region is in the centre of BC and sees over 4 million travellers directly through the region on the Trans-Canada Hwy and Hwy 97B, almost equidistant from Calgary and Vancouver. This offers a tremendous opportunity to engage with tourists that may be travelling to either destination.
Performance	NPS (by Province), Relative Performance, TSI	A rough search of the Shuswap catchment areas shows +50 snowshoe trails with 16 rated over 4.5 stars (AllTrails, January, 2024).

Figure J5. Share Performance Rankings: Nordic and Snowshoeing



Source: Shuswap Destination Brand Audit Workshop, 2023

Lakeside Lifestyle

Table J23. Shuswap Region Current vs. Potential Market Share Index: Lakeside Lifestyle

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	82.0%	77.0%	5.0%	Marketing
Attractiveness	86.0%	89.0%	-3.0%	Marketing
Affordable	52.0%	47.0%	5.0%	Pricing
Available	56.0%	59.0%	-3.0%	Develop
Accessible	62.0%	65.0%	-3.0%	Develop
Performance	70.0%	75.0%	-5.0%	
MARKET SHARE INDEX	**8.91%**	**9.26%**	**-0.4%**	
SHARE DEVELOPMENT INDEX	**96.2**			

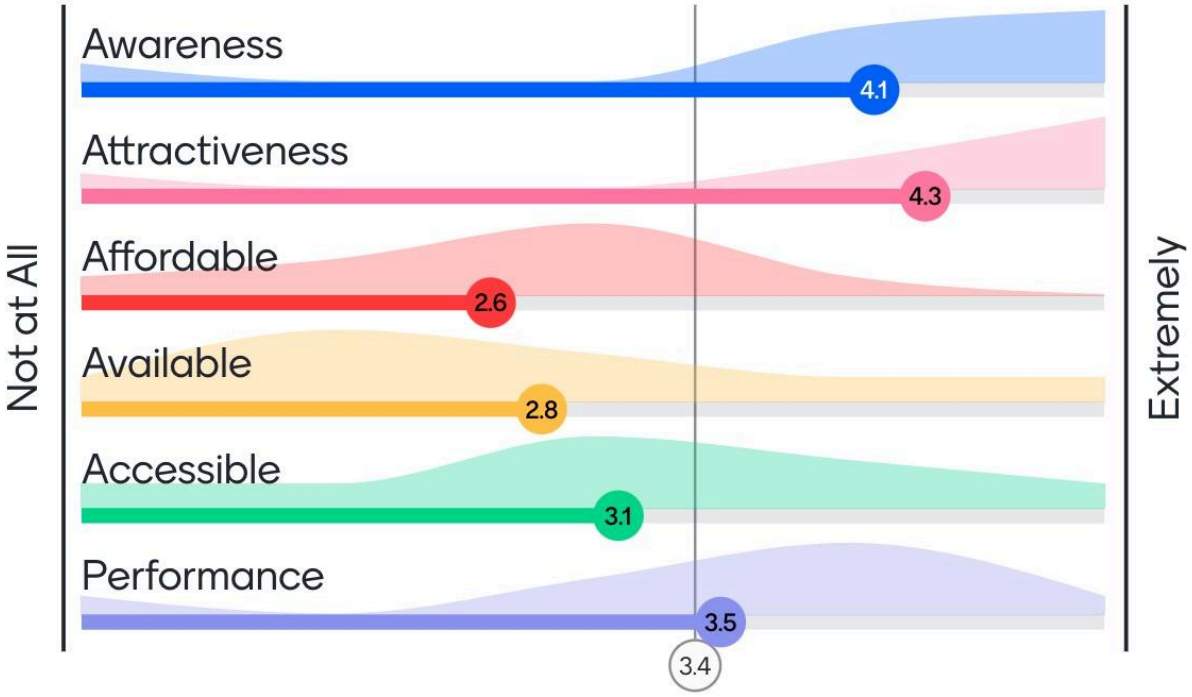
Table J24. Shuswap Region Share Performance Metrics: Lakeside Lifestyle[24]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	Beaches, lakes and rivers are ranked as a Top 5 Experience for BC residents. Nearly 45% look for lakeside fun and beaches when they vacation. Many throw their bikes in the back (16%) over neatly stacked golf clubs (12%) and fishing rods (15%). And if the destination doesn't provide, they've remembered to bring their own kayaks, canoes, or paddle boards (25%).
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available		Summer represents half of the Shuswap region's annual volume making compression a significant barrier for new entrants into the market. With current accommodations and campgrounds at capacity, locals admit that growth will only come with new hotels. Lake pollution and negative behaviours of visitors on the water are significant sustainability issues that need to be addressed (Shuswap Tourism Stakeholder Interviews, 2023).

[24] Sources: Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023

Share Performance Metric	Measure	Insight
Accessible		The Shuswap region is in the centre of BC and sees over 4 million travellers directly through the region on the Trans-Canada Hwy and Hwy 97B, almost equidistant from Calgary and Vancouver. This offers a tremendous opportunity to engage with tourists that may be travelling to either destination.
Performance	NPS (by Province), Relative Performance, TSI	Regional insights unavailable but overcrowding and compression could be causing downward pressure on visitor satisfaction.

Figure J6. Share Performance Rankings: Lakeside Lifestyle



Source: Shuswap Destination Brand Audit Workshop, 2023

Sledding

Table J25. Shuswap Region Current vs. Potential Market Share Index: Sledding

Share Performance Metric	Destination Response	Potential Response	Performance Gap	Management Focus
Awareness	66.0%	56.0%	10.0%	Marketing
Attractiveness	74.0%	84.0%	-10.0%	Marketing
Affordable	42.0%	42.0%	0.0%	N/A
Available	52.0%	42.0%	10.0%	Develop
Accessible	52.0%	52.0%	0.0%	Develop
Performance	60.0%	70.0%	-10.0%	Develop
MARKET SHARE INDEX	**3.33%**	**3.02%**	**0.3%**	
SHARE DEVELOPMENT INDEX	**110.2**			

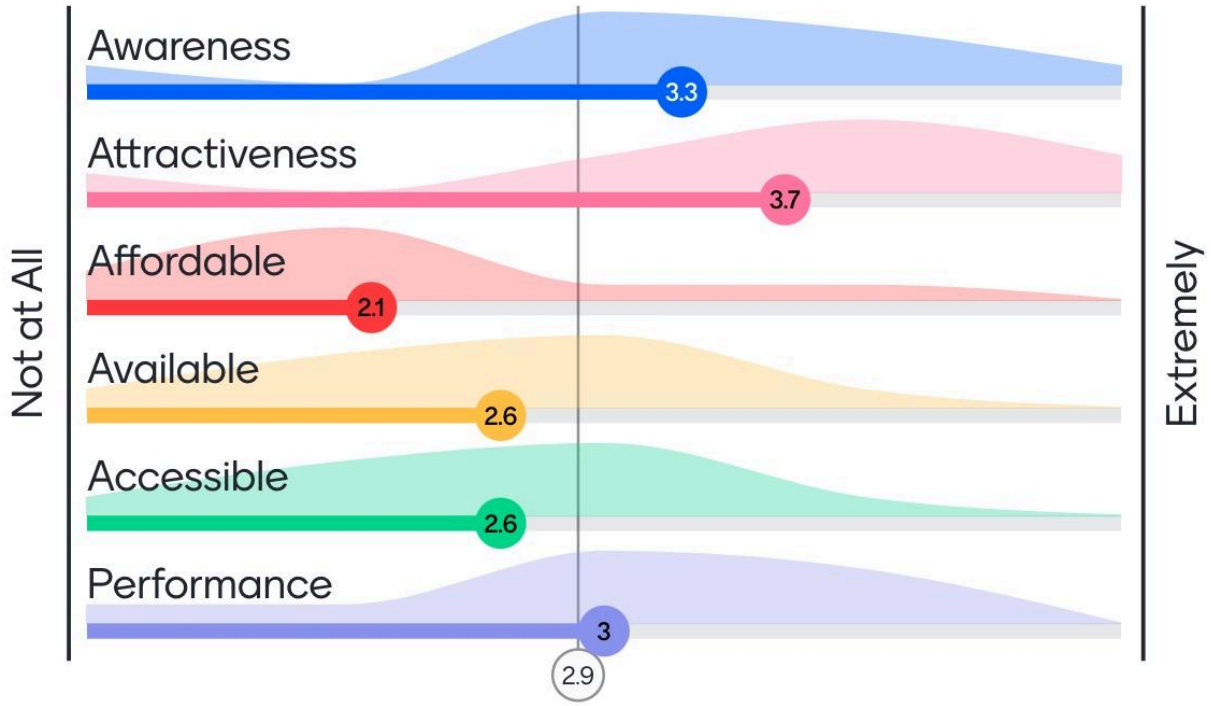
Table J26. Shuswap Region Share Performance Metrics: Sledding[25]

Share Performance Metric	Measure	Insight
Awareness	Aided Consideration, Knowledge of Vacation Opps, Net Active Planning	Aided Consideration: 40% of Canadians seriously consider visiting Thompson Okanagan (GTW, 2021). Knowledge of vacation opportunities is 26% (4th highest in BC) and net active planning 11%.
Attractiveness	Activity to Base Entire Trip Around, Activities Interested in While on Vacation	Eagle Valley Snowmobile Club reports nearly 3K multi-day trips at an average of 4.7 days (ie. 14K snowmobiler days) spending nearly $5M on everything from food, restaurants, gear, and including $1.2M on overnight accommodations (EVSC, 2021).
Affordable	Anticipated Travel Spending, Perceived Barriers to Travelling, Factors Influencing Destination Choice, Relative Price	Those travelling to BC expect to pay 36% more, and within BC, the same. Cost is the top deterrent for Canadian residents to travel domestically (41%, up from 34% in 2020). BC residents (34%) and Albertans (39%) say they'll visit the region if it fits within their budget.
Available		Sicamous has four sledding areas offering a variety of terrain from beginner to expert deep powder.

[25] Sources: Economic Impact Analysis: Sicamous Snowmobiling, Eagle Valley Snowmobile Club, MNP, 2021 | Shuswap Destination Development Plan, Destination BC, 2019 | Market Profiles, Destination BC, February 2023 | Canada, Global Tourism Watch, Destination Canada, 2021 | Shuswap Tourism Opportunity Strategy, SAEDC and CSRD, 2002 | TSI Rankings Report, Shuswap, Q2, 2023 | AllTrails Website, October 15, 2023 | ISMA reveals intriguing snowmobiling stats and facts, Snoriders Website, October 15, 2023

Share Performance Metric	Measure	Insight
Accessible		Motorized land use conflicts precipitating need for ORV Trail Strategy (BC Government has ORV Trail Strategy and Trail Fund).
Performance	NPS (by Province), Relative Performance, TSI	Regional insights unavailable but volume and popularity suggest very high performance ratings.

Figure J7. Share Performance Rankings: Sledding



Source: Shuswap Destination Brand Audit Workshop, 2023