SHUSWAP
Beautiful. Casual. Down-to-earth.

+ WAVES

THE RIGHT HEIGHT FOR DESTINATION MANAGEMENT IN THE SHUSWAP REGION

Destination Marketing and Development Strategy 2028

FINAL - Last Updated March 28, 2024

Travel Local
new markets nearby

Travel Local

new markets nearby

travellocalmarketing.ca

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Planning to Reach New Heights.

Project Overview

Why Destination Management is Important.

- Increased staff performance and employee satisfaction
- Greater stakeholder satisfaction
- Stronger buy-in for Shuswap focus, decisions, priorities, and spending
- Improves the health and resilience of local businesses
- Increases Shuswap market power and guest satisfaction

Project Plan Overview.

PHASE 1
Project Initiation and Planning

1. Project kickoff-off meeting including validating workplan and detailed project schedule
1. Set research goals and instruments, including mixed-methods such as: Literature Review; Interviews; Polling; Focus Groups; Surveys; Desk Research; Social Listening; Brand, Content and Channel Performance Audit; Price-Value Mapping; Importance-Performance Analysis; Community Capital Frameworks Analysis
1. Develop inventory of assets and stakeholders, leveraging background material provided by Shuswap Tourism
1. Develop comprehensive stakeholder engagement and consultation plan

PHASE 2
Data Collection and Strategic Insights

5. Conduct Brand, Content and Channel Audit, including full digital analysis of earned and owned channels
5. Conduct primary and secondary research and analysis report
5. Conduct a market analysis to align regional strengths to opportunities
5. Conduct a tourism infrastructure, DMO network, workforce, and land-use analysis
5. Initiate stakeholder consultation using Community Capitals Framework (CCF) and develop analysis report
5. Pair data points to uncover main strategic insights that will inform priorities and main strategies

PHASE 3
Performance Management Framework and Strategy Development

11. Prepare interim report
11. Develop and implement results-based performance management framework to set goals, key measures and actions that will signal continuous improvement
11. Prepare draft report
11. Present final report
11. Develop a communications plan to raise awareness and strengthen wider buy-in for final report
11. Close project and deliver final reports and materials

July 2023 | July - November, 2023 | November - January, 2023

The goal is to create a destination position that's sustainable, attractive and supports a competitive advantage.

Community and Market Insights.

Research and Engagement

Community Engagement.

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**

RESEARCH AND ENGAGEMENT.

LITERATURE REVIEW

WORKSHOPS (3)

FOCUS GROUPS

SURVEY

MIXED METHODS

INTERVIEWS

FACEBOOK GROUP

FEEDBACK AND POLLS

See **Appendix A** (Survey), **Appendix B** (Interviews), and **Appendix C** (Focus Groups) for a detailed summary.

Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis.

SWOT.

External

Negative

Positive

Internal

Threats

- Climate Change
- Labour Shortages
- Rising Costs
- Provincial, Regional, and Municipal Regulations

Opportunities

- Tourism Infrastructure and Amenities
- Shoulder Seasons
- Active Transportation Network
- Organized Sustainability Initiatives
- Unified Marketing and Development Strategy
- Road Infrastructure Improvements and Maintenance

Weaknesses

- Infrastructure and Amenities
- Seasonality of Demand
- Fragmented Marketing and Development
- Transportation Infrastructure
- Organized Sustainability Initiatives
- Awareness

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

See **Appendix D** for a detailed summary.

Destination Brand Audit.

Destination Audit Focus.

1

Culture

2

Market Analysis

3

Marketing Mix

See **Appendix E** for a detailed summary.

Brand Audit Results.

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 tourism 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.

See **Appendix E** for a detailed summary.

Brand Audit Results.

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.

See **Appendix E** for a detailed summary.

Brand Audit Results.

Marketing Mix

- **Despite the existence of a 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.

See **Appendix E** for a detailed summary.

Market Performance and Trends.

2022 ON THE PATH TO RECOVERY

DESTINATION CANADA

LEGEND

Overnight arrivals

2019 | 2022

% current proportion of 2019 levels

After reopening its borders to international travel in late summer 2021, Canada removed all COVID-19 border regulations on October 1, 2022.

Visitor arrivals gradually improved throughout the year to bring 2022 annual arrivals to 58% of 2019 levels.

UNITED STATES
15.0M | 9.1M | 61%

MEXICO
487K | 347K | 71%

UK
863K | 588K | 68%

FRANCE
663K | 463K | 70%

GERMANY
415K | 249K | 60%

CHINA
708K | 64K | 9%

JAPAN
251K | 51K | 20%

SOUTH KOREA
254K | 74K | 29%

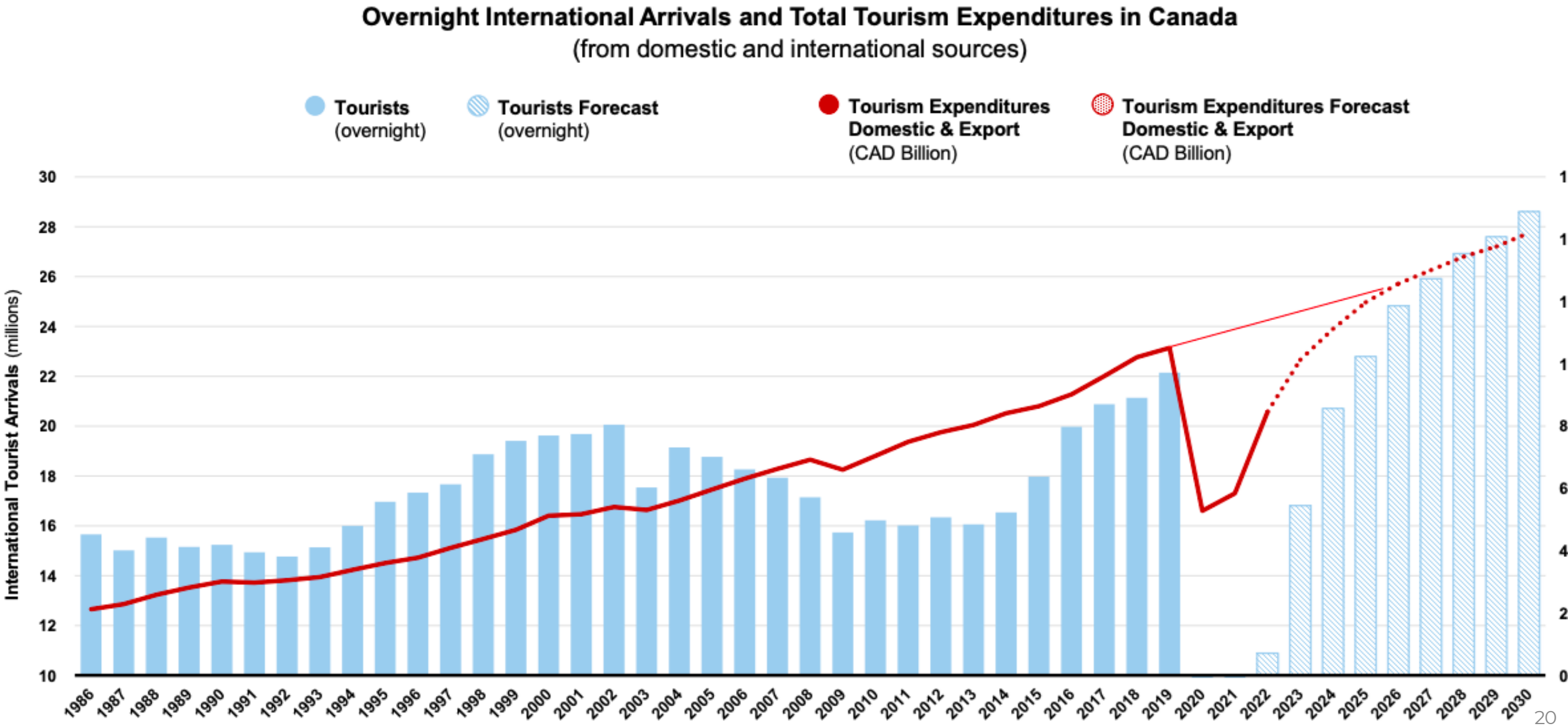
AUSTRALIA
351K | 159K | 45%

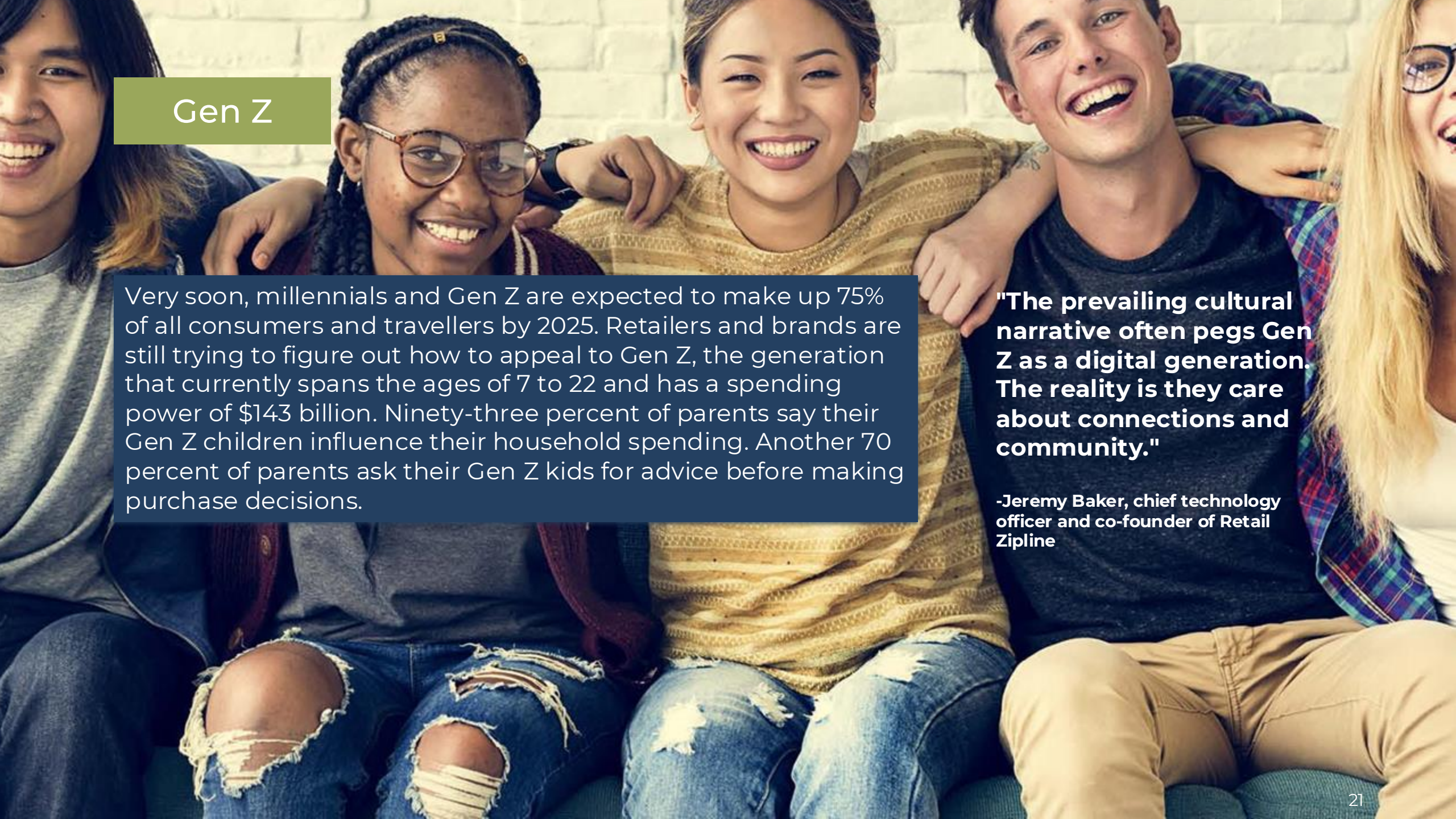
TOTAL ANNUAL GLOBAL ARRIVALS
22.1M | 58%

Monthly overnight arrivals

4M

Tourist expenditures and international arrivals set to return to long-term growth trend by 2026





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. 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.

"The prevailing cultural narrative often pegs Gen Z as a digital generation. The reality is they care about connections and community."

-Jeremy Baker, chief technology officer and co-founder of Retail Zipline

Key Trends.

Based on Shuswap region's strengths and assets, the following consumer trends hold the most potential for the region:

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

See **Appendix F** for a detailed summary.

Competitive Analysis and Sources of Advantage.

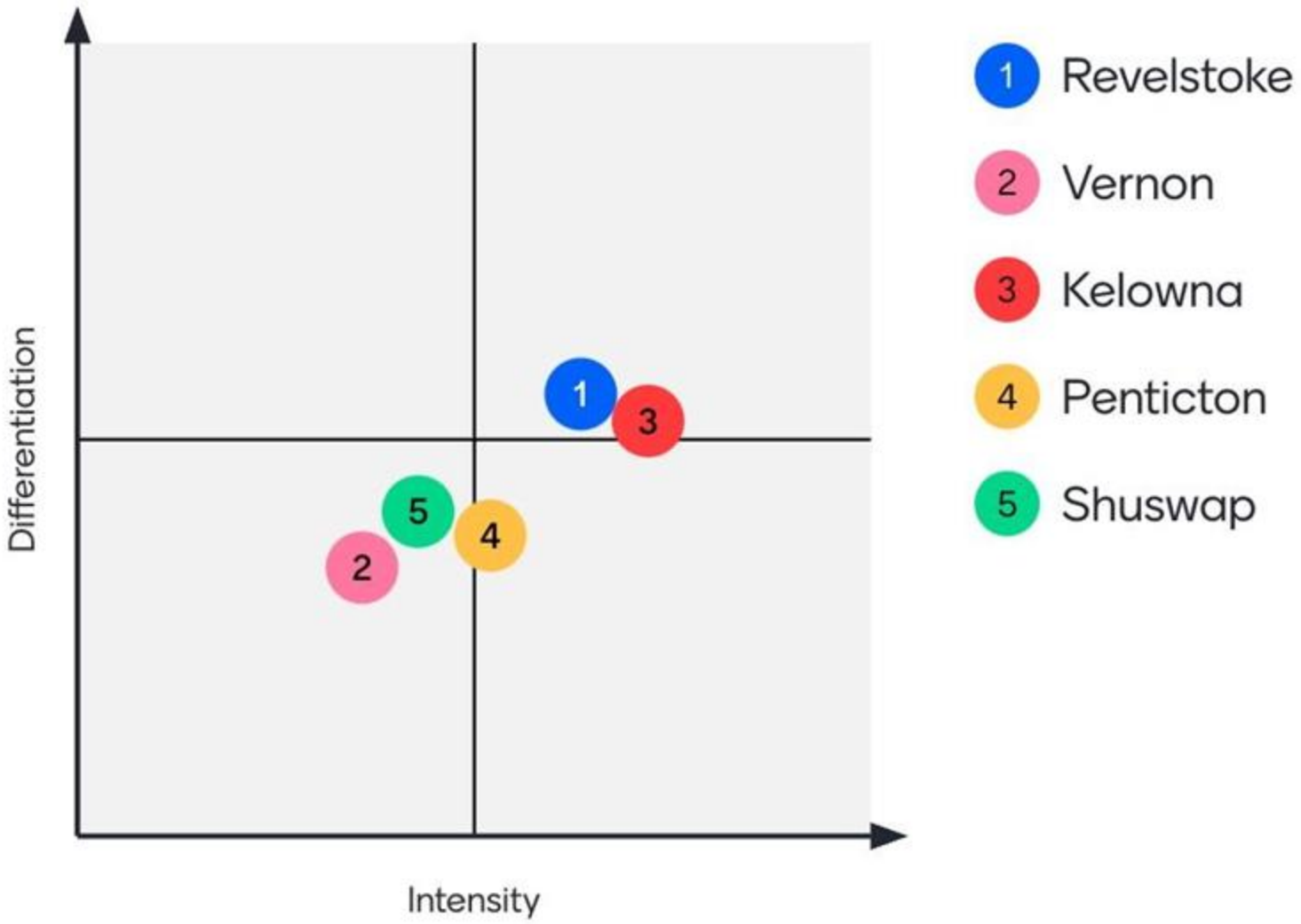
Competitive Set Analysis.

Key Findings

- 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".

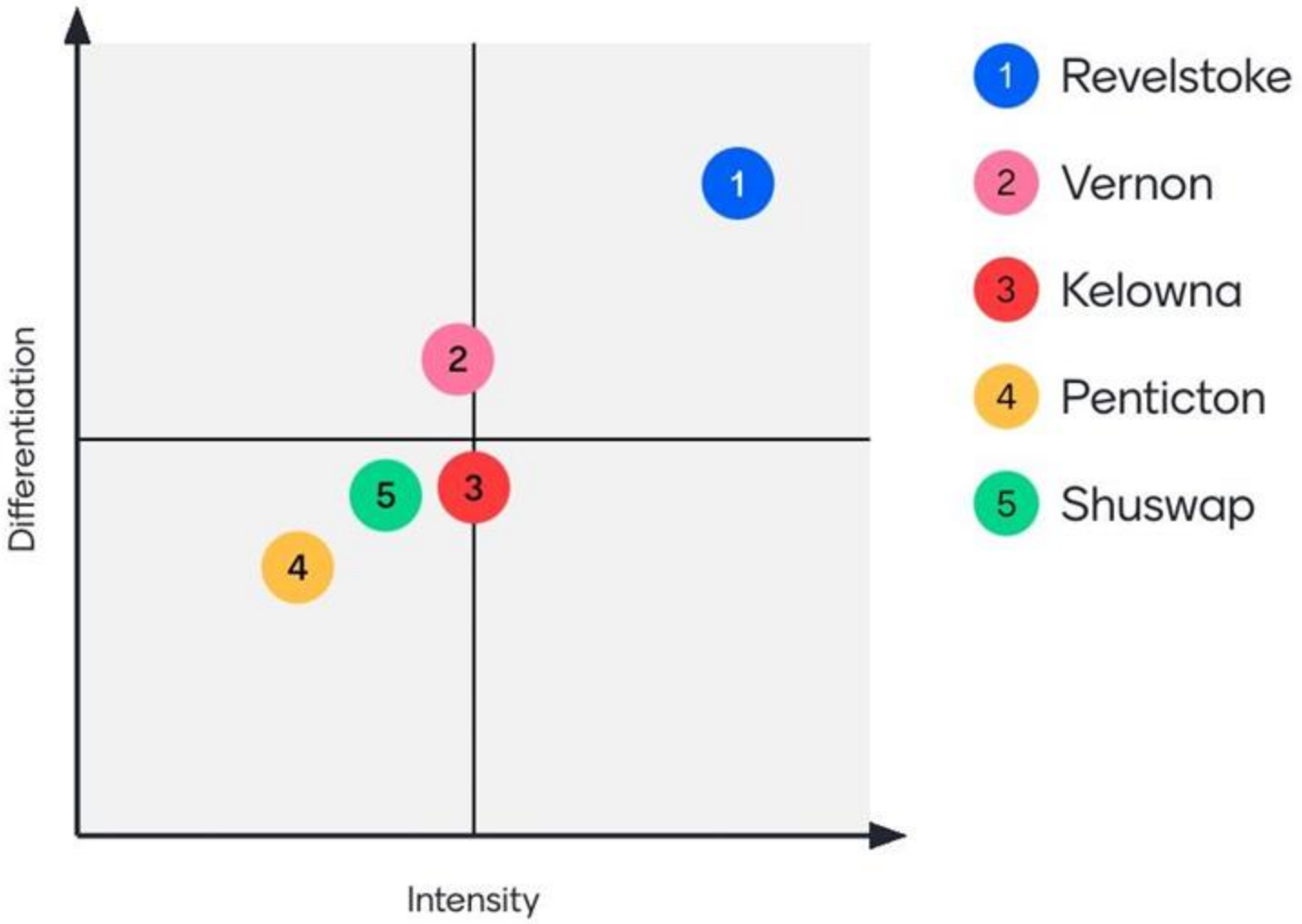
See **Appendix G** for a detailed summary.

Competitive Advantage (Summer).



Source: Shuswap Destination Brand Audit Workshop, 2023

Competitive Advantage (Winter).



Source: Shuswap Destination Brand Audit Workshop, 2023

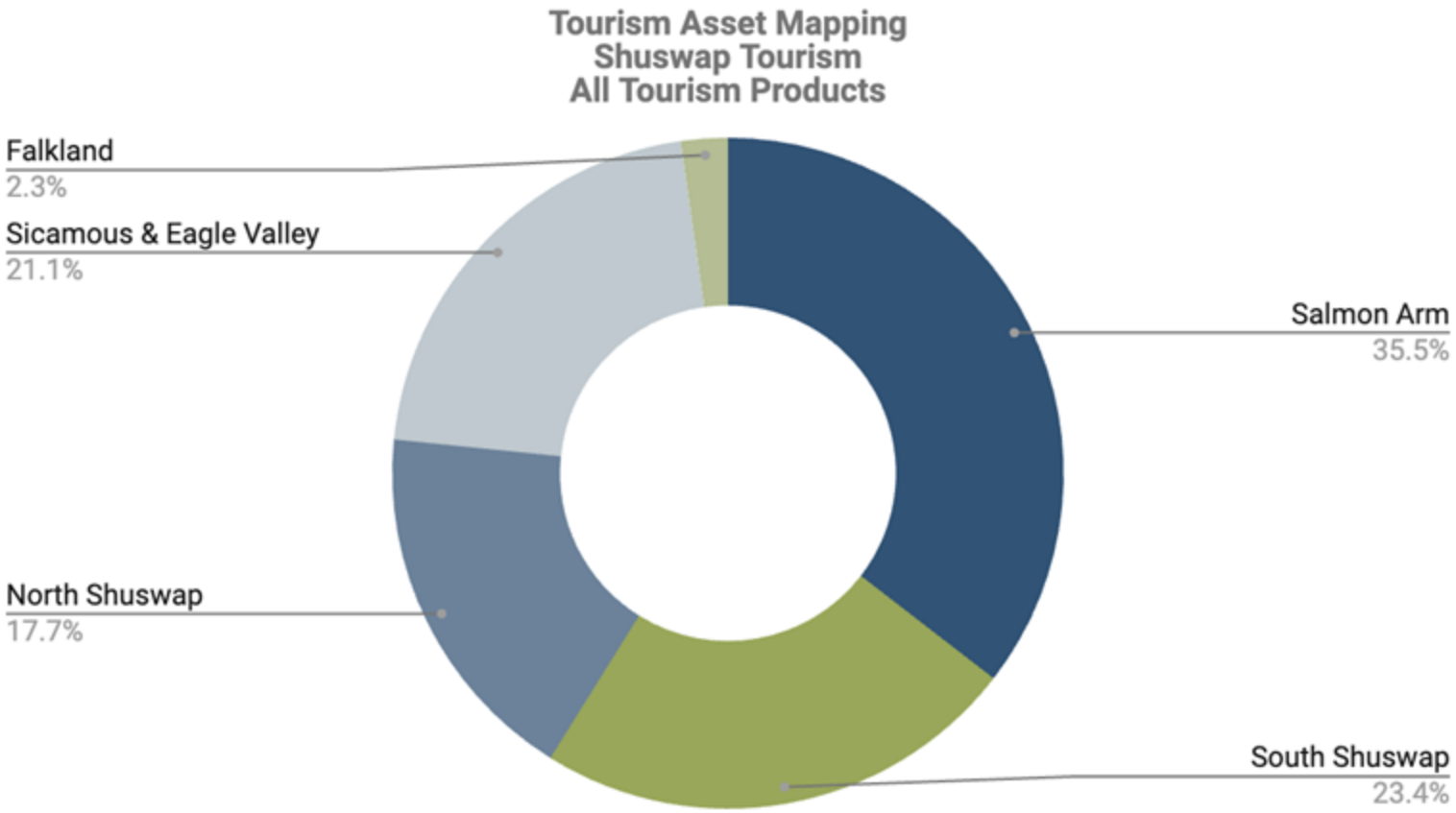
Product and Experience Analysis.

Tourism Asset Mapping.

Overview

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 H** for a detailed summary.

Product Breadth and Depth.

Key Findings

- The Shuswap region has something to offer in every season, but compared to similar nearby destinations, Shuswap falls in the middle of the pack
- **Strongest season is spring/summer** (scoring the highest tourism offering index across the competitive set) but Shuswap has the **lowest tourism offering index in fall/winter** season compared 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

High-Value Destination Development and Marketing Opportunities

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 H** for a detailed summary.

Product Breadth and Depth.

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**

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 (i.e., anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

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

Competitor Price-Performance Analysis.

Overview

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

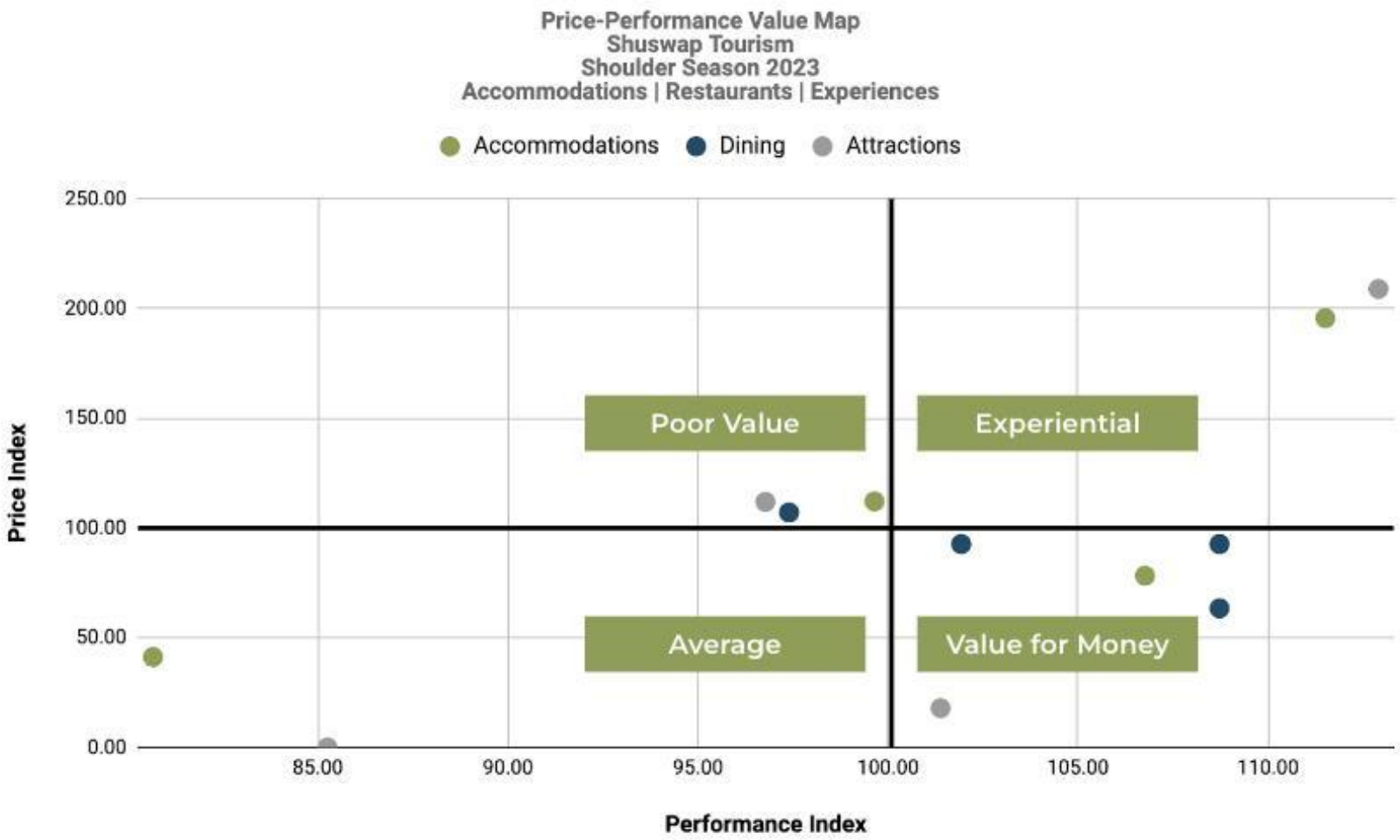
See **Appendix H** for a detailed summary.

Price Performance Value Map.

What's the Story?

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.

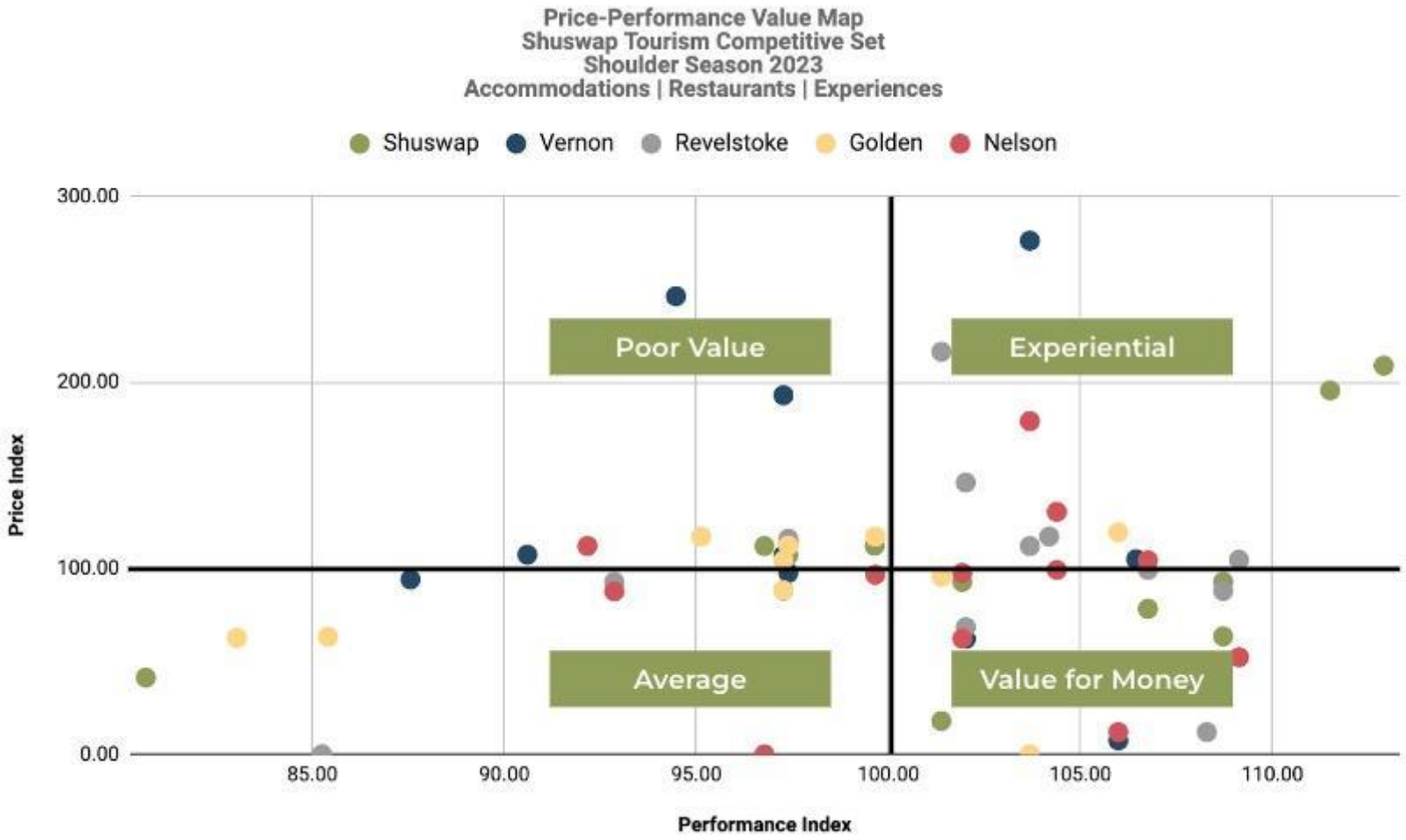


What's the Story?

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

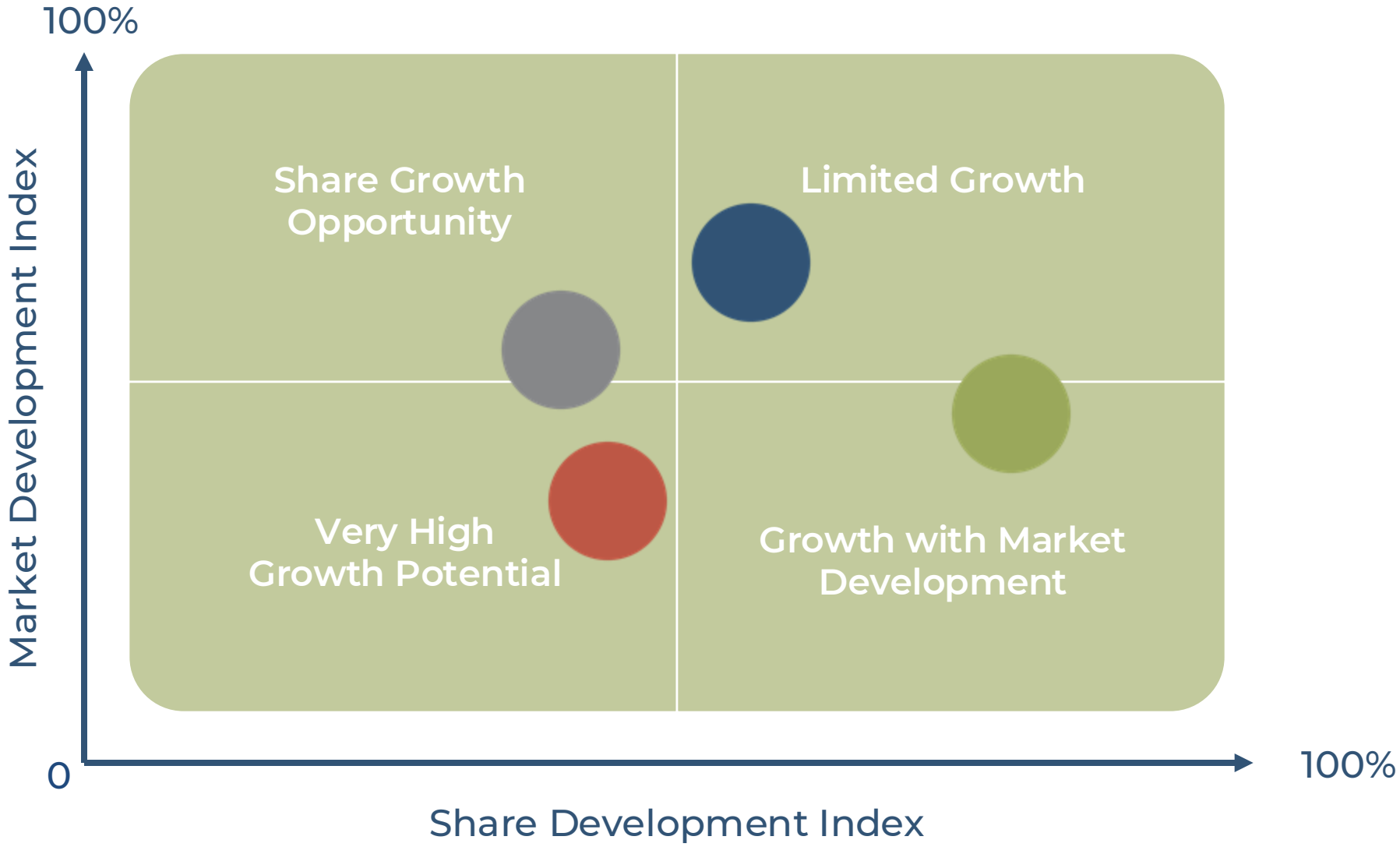
Golden and Vernon businesses seem to have their work cut out for them with too many offering poor to average value.

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.



Destination Growth Analysis.

Managing Destination Growth Potential.



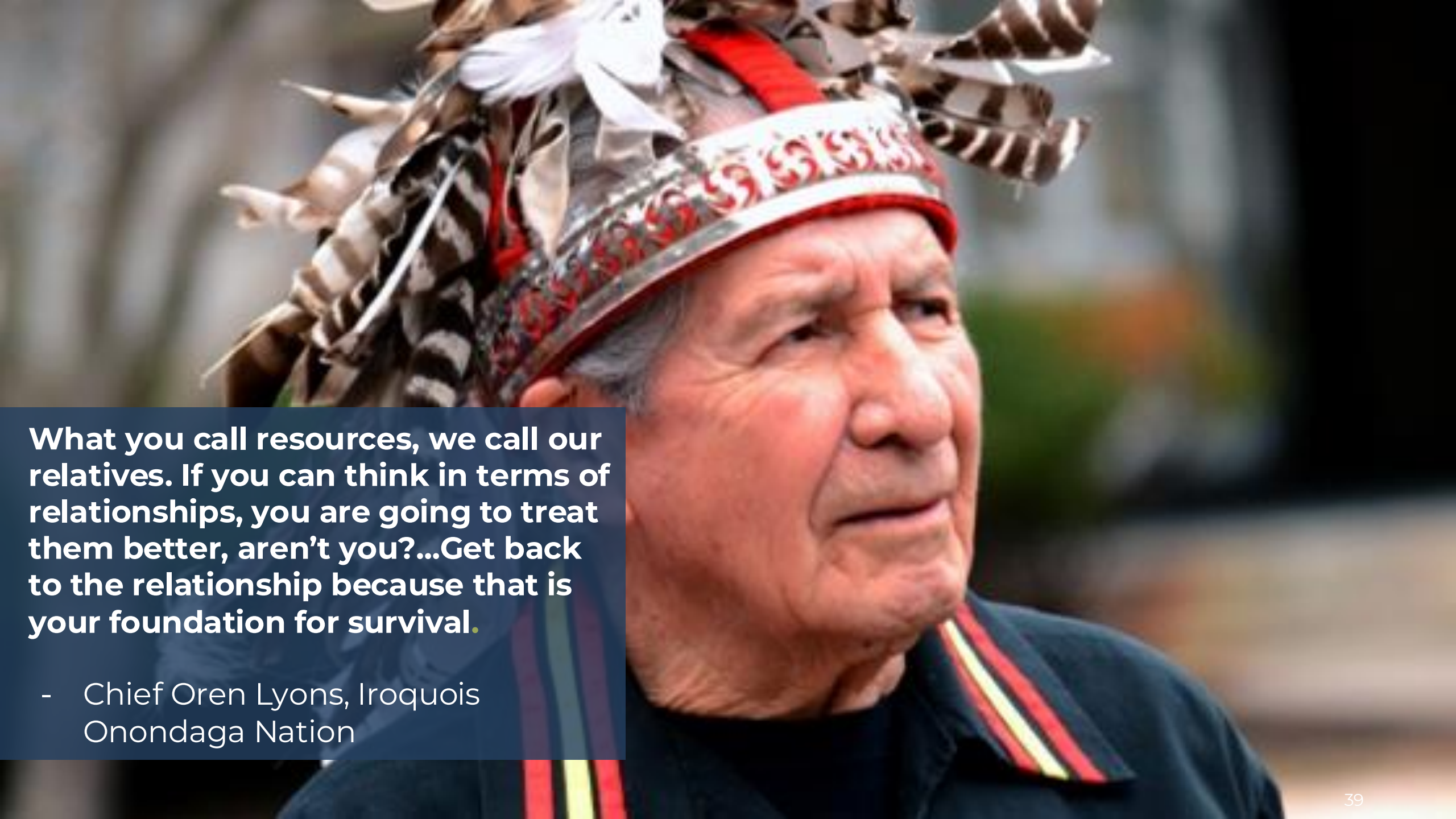
See **Appendix I** for complete method and analysis.

Shuswap Destination Growth Potential.

See **Appendix I** for a detailed summary.

A New Vision for the Shuswap Region.

Well-Being is The Big Result



What you call resources, we call our relatives. If you can think in terms of relationships, you are going to treat them better, aren't you?...Get back to the relationship because that is your foundation for survival.

- Chief Oren Lyons, Iroquois Onondaga Nation

A Destination Vision Focused on Well-Being: A New Methodology.

Well-Being: The New Signal of Progress.

1. Set the Vision

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.

2. Set the Goal

After being introduced to the fundamentals of regenerative economics, 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.

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.

A Destination Vision Focused on Well-Being: A New Methodology.

Well-Being: The New Signal of Progress.

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).[1] 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.

Community Vision for Well-Being.

Source: Shuswap Tourism Advisory Committee Workshop, 2023

Well-Being: The New Signal Of Progress.

CONNECTING TO THE PEOPLE AROUND US.

BEING ACTIVE IN OUR BODIES.

TAKING NOTICE OF THE WORLD.

LEARNING NEW SKILLS.

GIVING TO OTHERS.

Source: New Economics Foundation

Community Vision for Well-Being.

Q1: Describe what success looks and feels like in the Shuswap region.

Factors Contributing to Community Well-Being

N = 31

	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%

**Derived from The New Economics Foundation's Five Ways to Wellbeing*

Source: Shuswap Tourism Advisory Committee Workshop, 2023

Well-Being: The New Signal Of Progress.

42%

CONNECTING TO THE PEOPLE AROUND US.

52%

EXPERIENCING JOYFUL MOMENTS.

20%

TAKING NOTICE OF THE WORLD.

16%

PROSPERING BUSINESSES AND COMMUNITIES.

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

Change the Destination Goal.

Going Beyond Growth

Progress can no longer be endless growth.

- Kate Raworth, DEAL

The Doughnut.

A Compass for 21st Century Thriving

Between these two boundaries lies a doughnut-shaped space that is both ecologically safe and socially just – a space in which destinations can thrive.

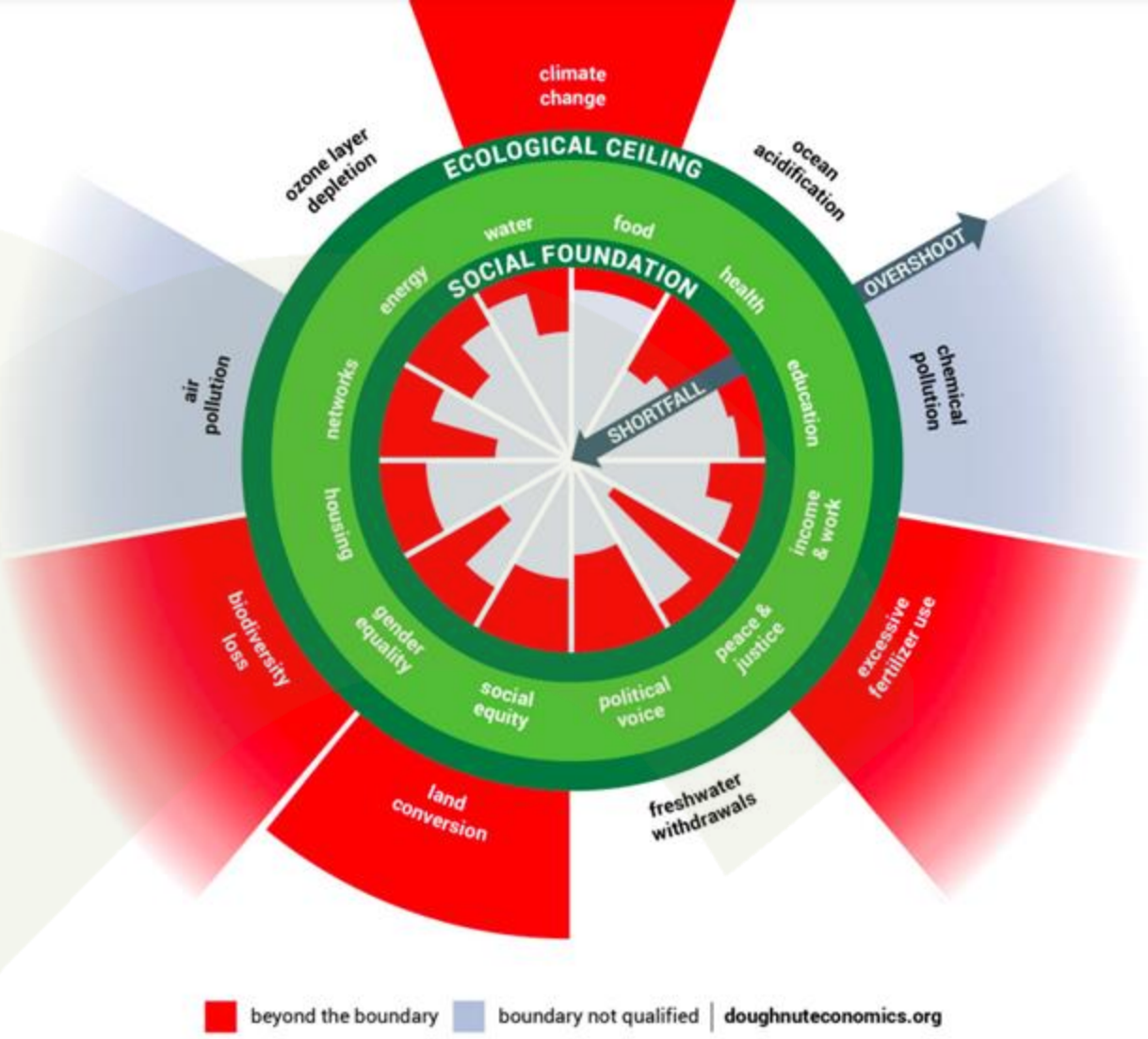
The goal is to leave no one falling short on the essentials of life, without overshooting planetary boundaries.

Source: Kate Raworth, Doughnut Economics Action Lab.

The Doughnut.

The World is Far Out of Balance

Today's global economy leaves billions of people falling short on life's essentials AND is overshooting multiple planetary boundaries.



Source: Kate Raworth, Doughnut Economics Action Lab

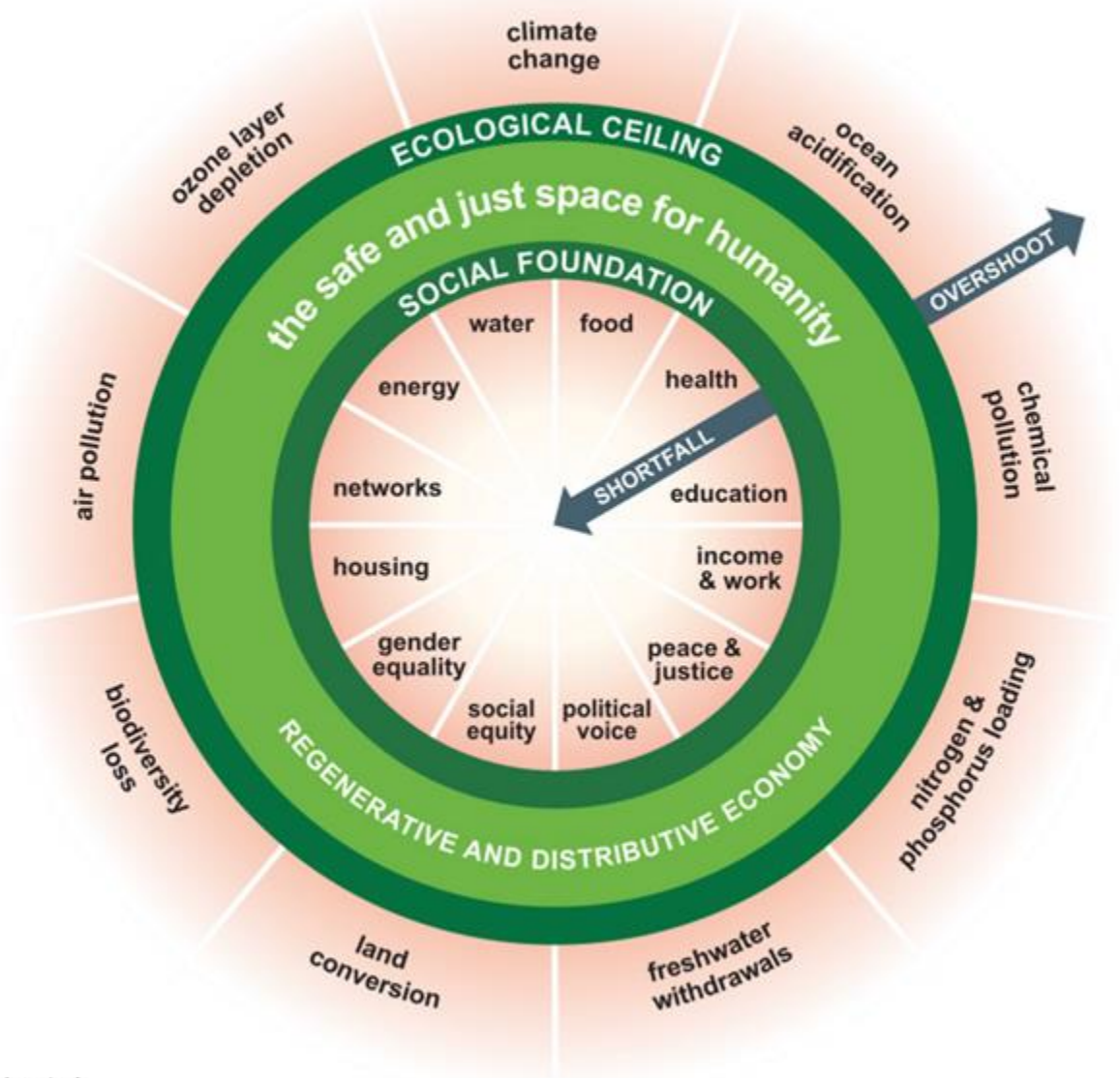
Let's Get Inside The Doughnut.

Group Exercise

Using a **GREEN CARD**, identify ways that Shuswap visitors and the community help humanity move towards living in the Doughnut.

Using a **RED CARD**, identify ways that your organization contributes to social and ecological pressure.

Use an **ORANGE CARD** to identify where social and ecological pressures create risks or impacts for your community.



Reference: Kate Raworth, Doughnut Economics Action Lab.

Doughnut Exercise Key Insights.

How do Shuswap visitors / businesses help humanity move towards sustainability?

N = 43

	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%

Collaborative efforts by community champions and organizational partners are seen to have the biggest impact on sustainable practices in the Shuswap region. Environmental preservation, food security programs and support-local initiatives also ranked highly.

Living within the Doughnut.

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.

Source: Shuswap Tourism Advisory Committee Workshop, 2023

Doughnut Exercise Key Insights.

How do Shuswap businesses / organizations contribute to social / ecological pressures?

N = 53

	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%

Damage to the local ecosystem is the biggest concern when it comes to the impact of tourism in the Shuswap region, along with the unsustainable development of resident housing.

Pushing Outside Healthy Boundaries.

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.

Source: Shuswap Tourism Advisory Committee Workshop, 2023

Doughnut Exercise Key Insights.

Where do social / ecological pressures create risks or impacts for businesses?

N = 48

	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%

Key risks identified include overloading infrastructure capacity, adapting to climate change, and environmental degradation.

Full Circle Risks and Impacts.

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.

Source: Shuswap Tourism Advisory Committee Workshop, 2023

Change the Yardstick for Progress.

Measure
Well-Being,
Not Growth

A New Way to Measure Well-Being.
The Tourism Quality of Life Index

Please rate how important the following items are to you personally.
Scale: 1 = “not at all important” to 5 = “extremely important

	1	2	3	4	5
Preserving peace and quiet					
Feeling safe					
Clean air and water					
City services like police and fire protection					
A stable political environment					
Good public transportation					
The beauty of my community					
Quality roads, bridges, and utility services					
The prevention of crowding and congestion					
Controlled traffic					
Controlled urban sprawls and population growth					
Litter control					
Proper zoning/land use					
My personal life quality					
The preservation of my way of life					
A feeling of belonging in my community					
Resident participation in local government					
Having tourists who respect my way of life					
The image of my community to others					
An understanding of different cultures					
Awareness of natural and cultural heritage					
Community pride					
Opportunities to participate in local culture					
Preservation of wildlife habitats					
Preservation of natural areas					
Preservation of cultural/historical sites					
Strong and diverse economy					
Stores and restaurants owned by local residents					

Measure the Outcome that Matters Most

The success and performance of your destination management efforts should be measured against whether or not they continuously improve your community’s well-being.

The **Tourism and Resident Quality of Life Index (TQOL)** is the global tourism industry’s top method for measuring sentiments about your visitor economy’s sustainability and impact on everyday life in your community. **Using 38 quality-of-life indicators**, your community rates their importance, satisfaction with outcomes, and tourism’s most important contributions.

The Benefits.

One Index says it all. Understand the economic, social, and environmental outcomes at play in your destination. The **TQOL Index** is your single best destination management KPI, and your best way to benchmark year over year the performance results that really matter to the people who actually live there.

Destination Well-Being: Measuring Continuous Improvement.

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

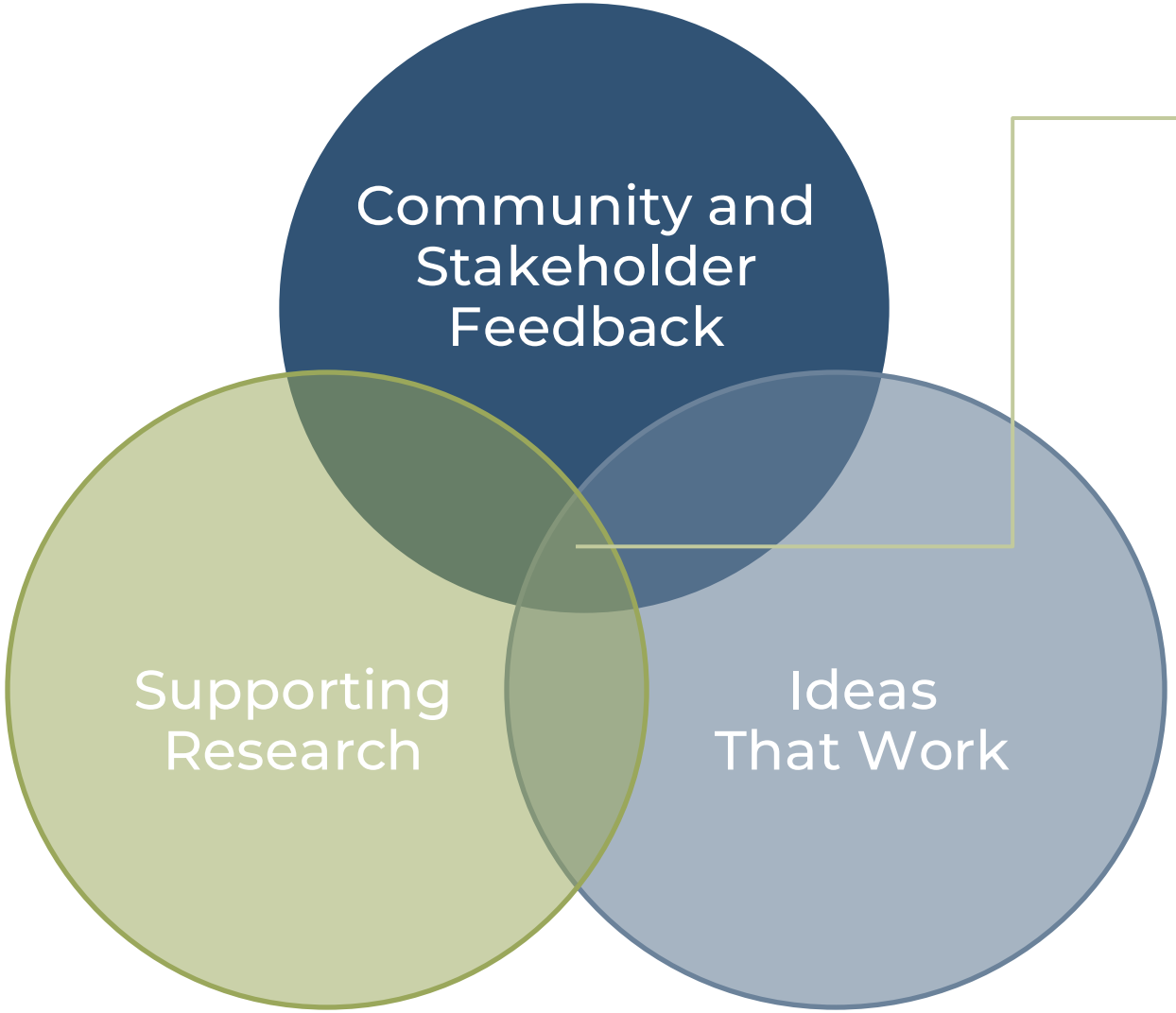
Regenerative and Distributive By Design.

Destination Development and Marketing Focus

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.***

Destination Development and Marketing Focus

Strategic Insights.



What's the story?

We pair what we learned over the community engagement and research work, and then, we stand back and look at the bigger story this data is telling us. These *Strategic Insights* then form the backbone of the destination development focus. This step makes sure that each priority can be traced back to what the community, stakeholders, and experts have said or reported.

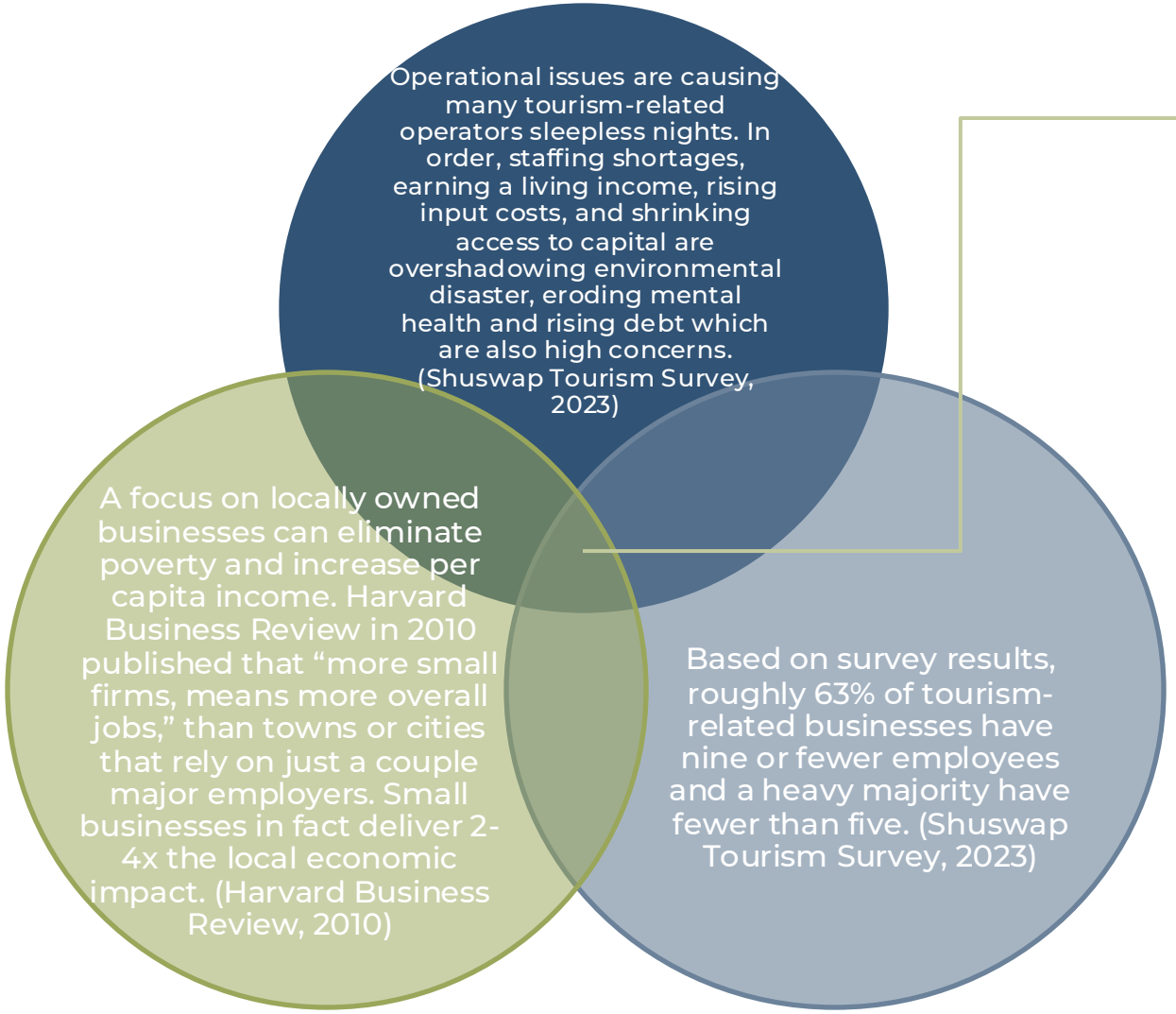
Build a More Redistributive, Resilient, Local Economy.

Destination Development and Marketing Focus

We need to re-invent economic development as if small business mattered.

- Michael Shuman, Global Expert Building Local Economies

Strategic Insights.



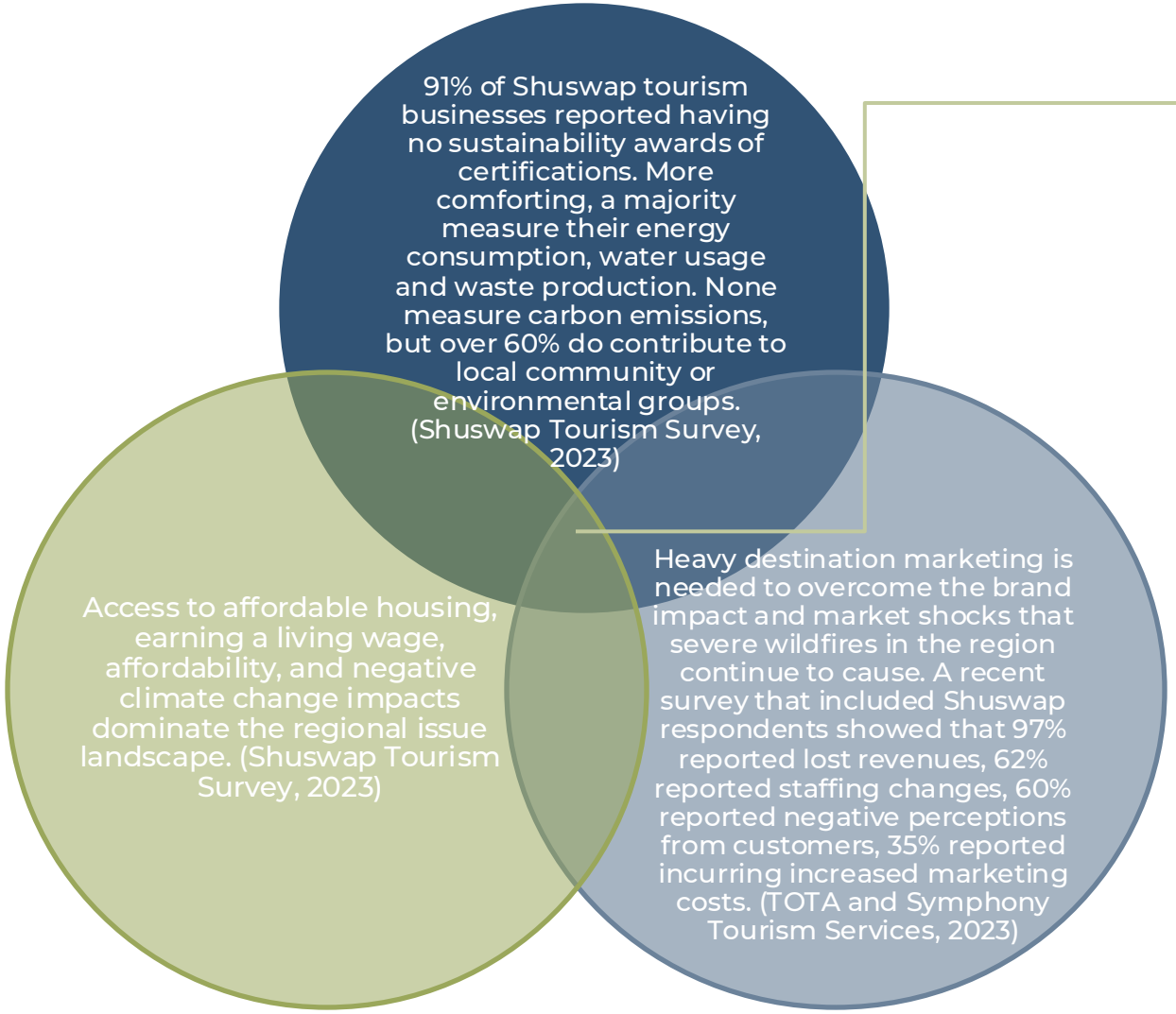
What's the story?

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 loca 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.

Small is beautiful.

A Diversity Of Small Economic Development Projects Can Be Deeper And Longer Lasting For The Local Economy.

Strategic Insights.



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 available critical tools 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.

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

Focus.

Build a More Redistributive, Resilient, Local Economy

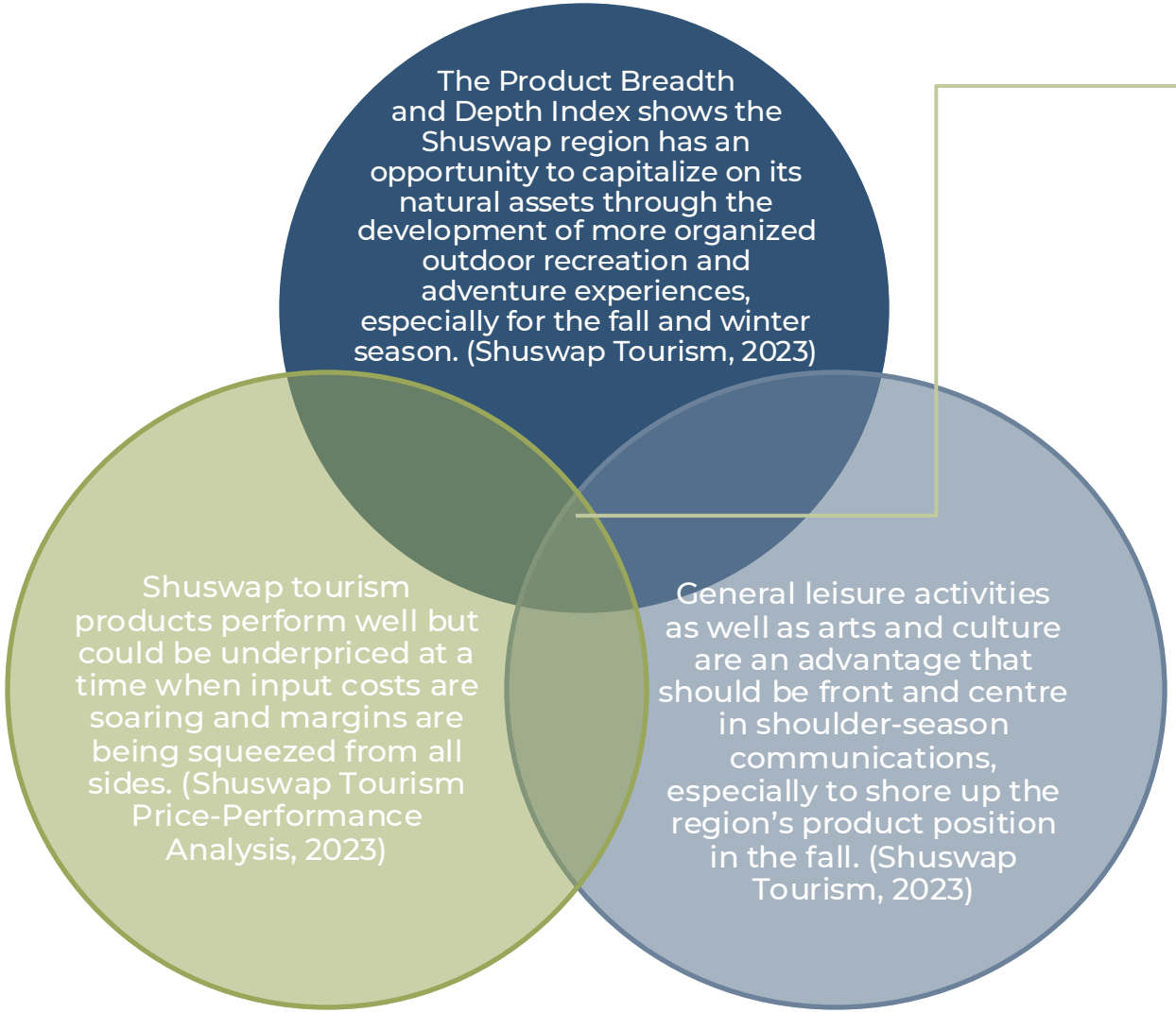
Improve profitability of locally owned businesses by bringing together Shuswap tourism-related business operators to pursue scale efficiencies to ensure businesses continue to generate outsized local impacts.

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

Make the Shuswap More Competitive.

Destination Development and Marketing Focus

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 experiences in the Spring and Fall so that the region claims a clear advantage over competitors.

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 enterprise business model to capitalize on natural assets through the development of more organized outdoor recreation and adventure experiences

Focus.

Make the Shuswap More Competitive

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

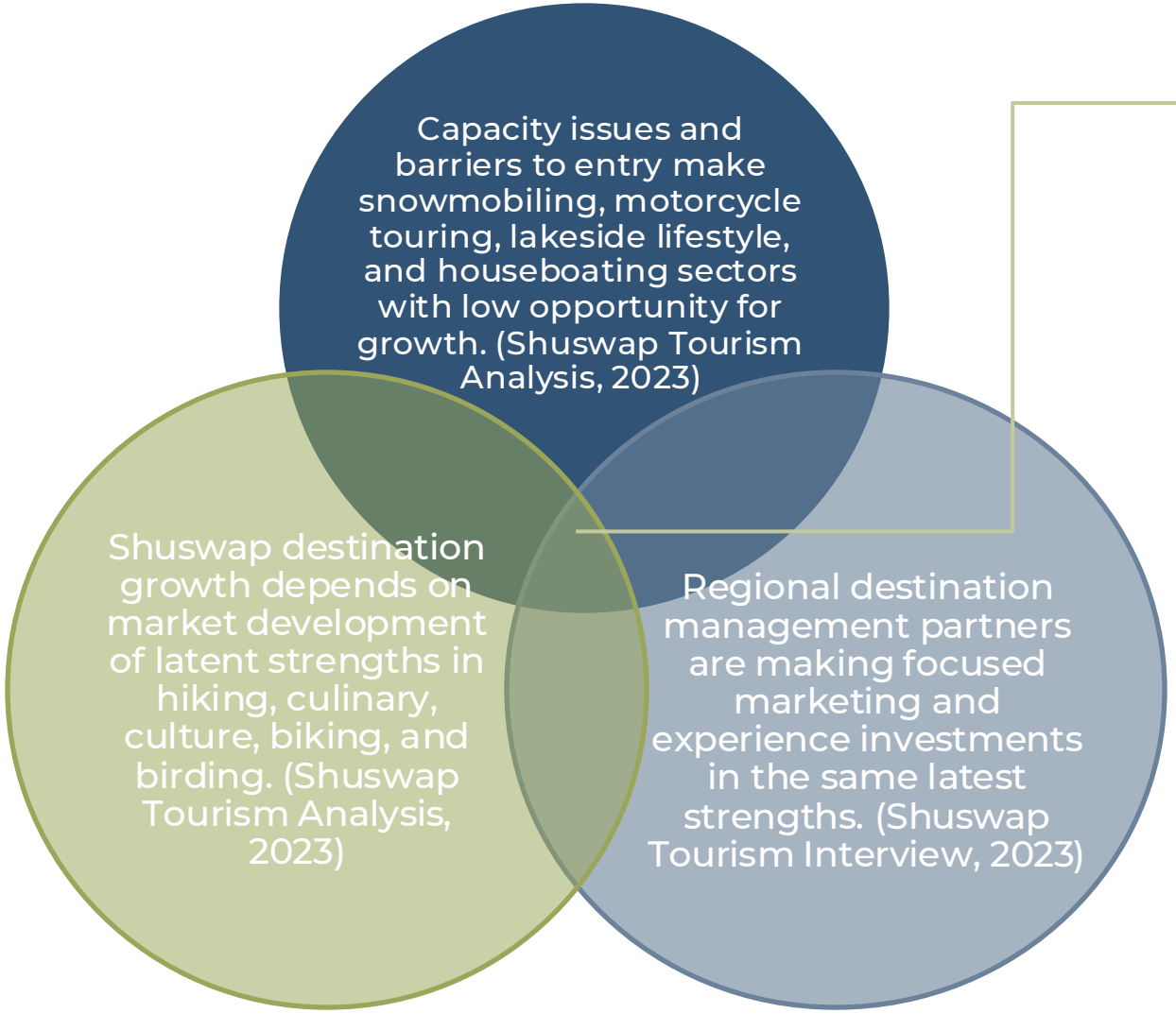
Key Initiative	Start	Resource(s)
1. Mentor, coach, and encourage the next generation of tourism related-business owners by working with local business accelerators	2025	Partnership
2. Offer service culture training, experience improvements and yield pricing to push local tourism-related businesses to 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

*See **Appendix J** for for Grande Cache Case Study.

Flex the Full Strength of Our Experience.

Destination Development and Marketing Focus

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.

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.

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

Focus.

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

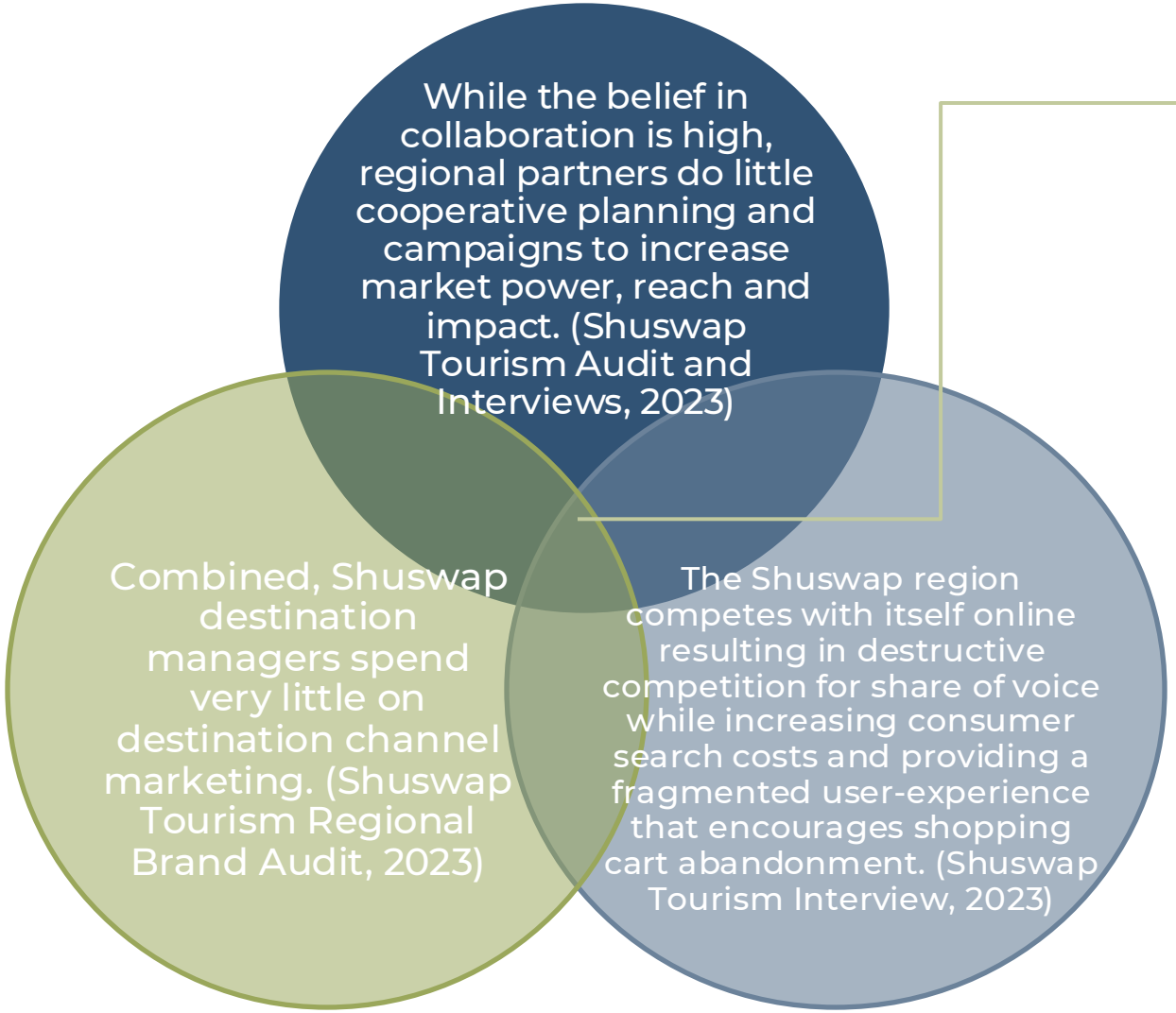
Focus.

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)
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

Strategic Insights.



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 tourism 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 building a collaborative marketing focus that applies the full marketing power of the region to increase traveller awareness and consideration about sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.

Key Initiatives

- 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

Strategy.

Harness latent experience strengths in hiking, culinary, culture, biking and birding by building a collaborative marketing focus that applies the full marketing power of the region to increase traveller awareness and consideration about sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.

Key Initiatives

- 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.

Focus.

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. Institute a collaborative planning framework to develop and continuously improve a regional marketing focus	Annually Q3 2024 Start	Internal
2. 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
3. Develop and rollout a refreshed regional marketing segmentation strategy that better leverages the competitive advantage of EQ	2024	Internal

Focus.

Flex the Full Strength of Our Experience

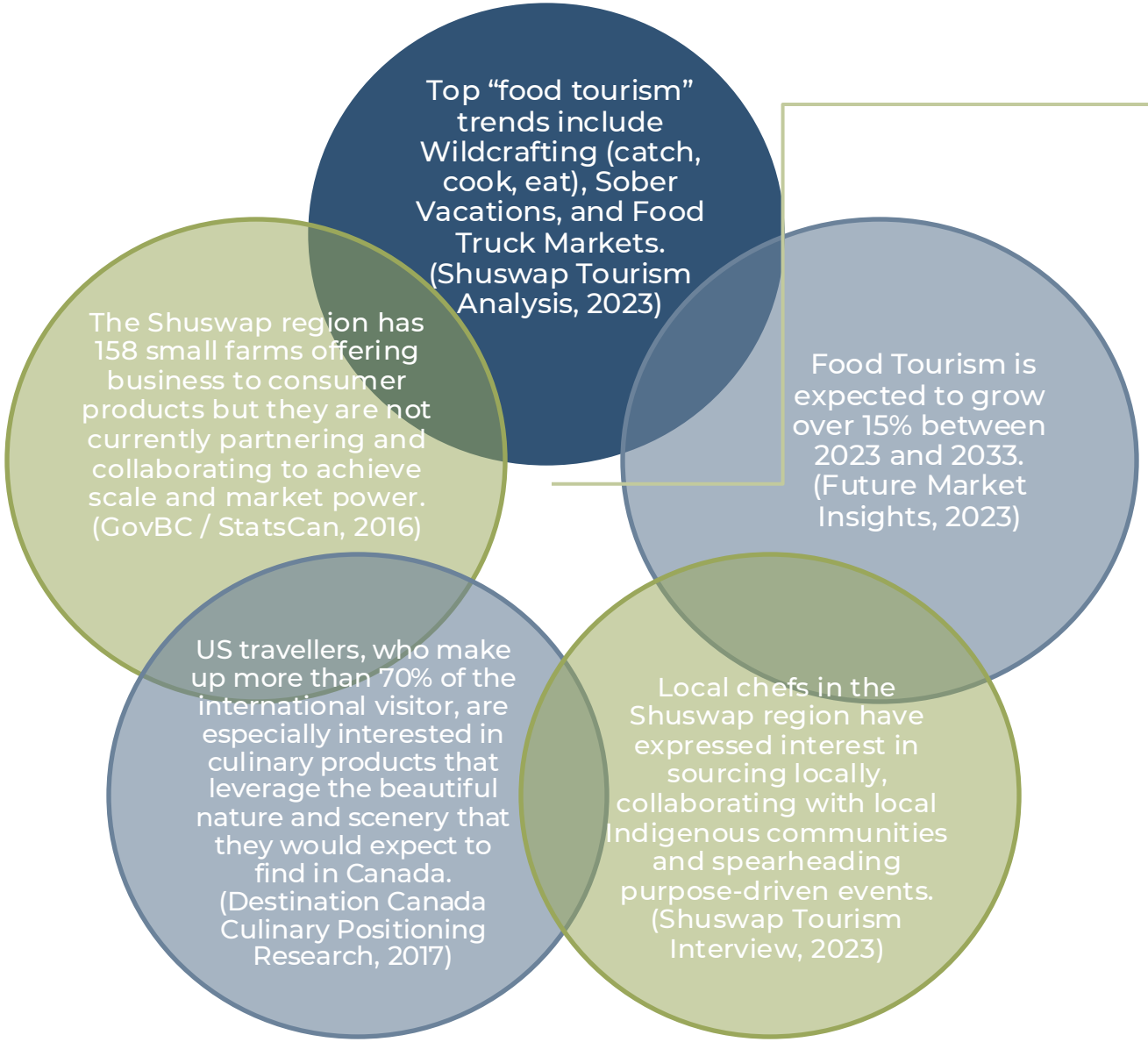
Harness latent experience strengths in hiking, culinary, culture, biking and birding by coordinating a heavy regional investment focus on sector growth opportunities that can differentiate the Shuswap region in the shoulder-seasons and increase competitive intensity.

Key Initiative	Start	Resource(s)
4. Align budgets, human resources and marketing communications focus against the most relevant and important stages of the P2P: awareness and consideration	2024	Internal
5. 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
6. 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

Share the Best Bites of the Shuswap.

Destination Development and Marketing Focus

Strategic Insights.



What’s the story?

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.

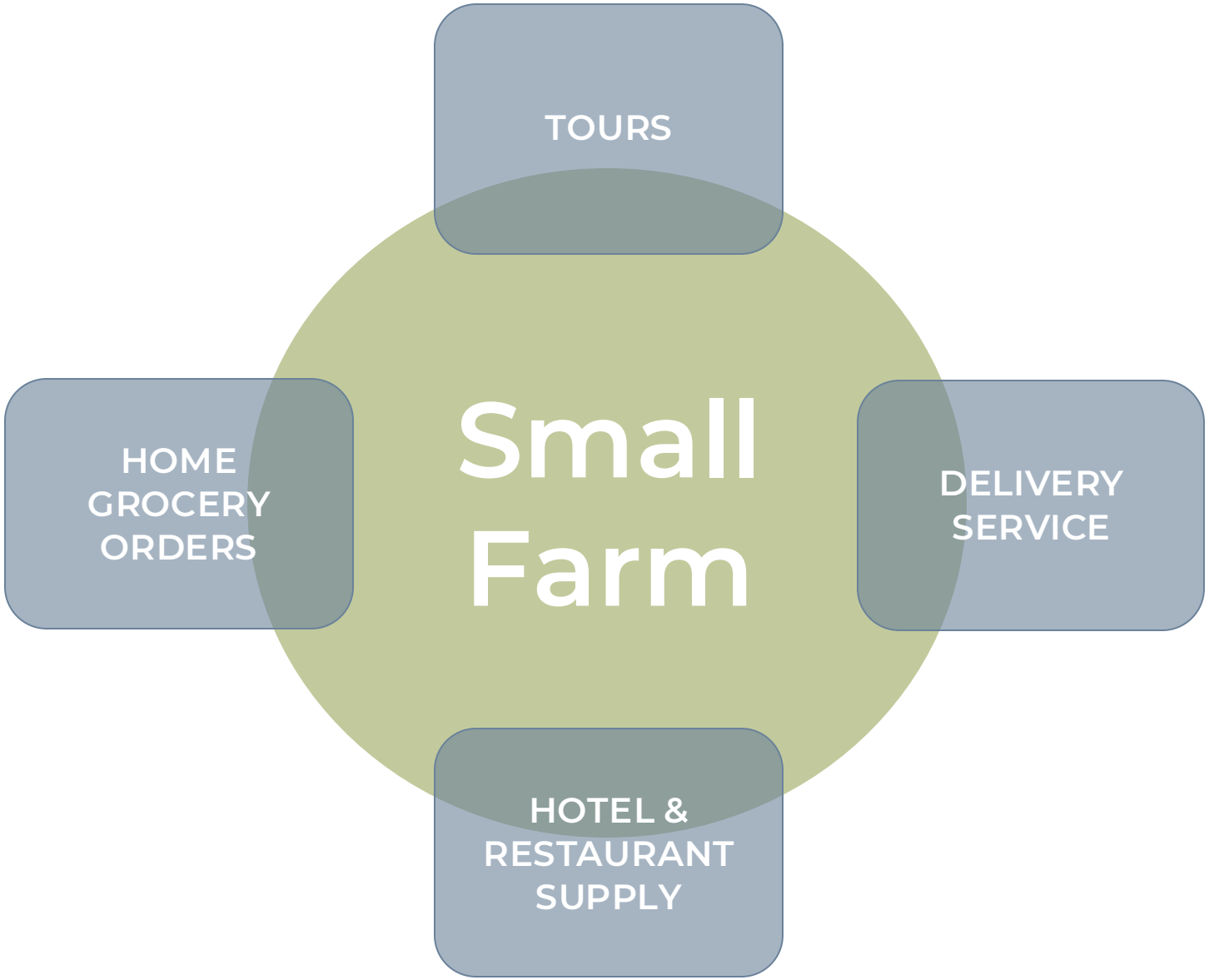
Solutions will run up and down the entire value chain. A focus on growing deep, not broad, will help build local clusters of businesses from scratch to diversify. The small farm movements present particular strong advantages for Indigenous communities looking to increase their food sovereignty.

Skipping the pre-trip Costco Run to stock up on groceries bought locally cuts waste, improves quality, and saves on gas. You're also helping the local community thrive, rather than lining the pockets of an international company.

If more overnight visitors bought local, car emissions would go down, local jobs would go up, and small retailers would thrive.

Grow deep, not broad.

Create business clusters from SCRATCH.



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.

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

Focus.

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

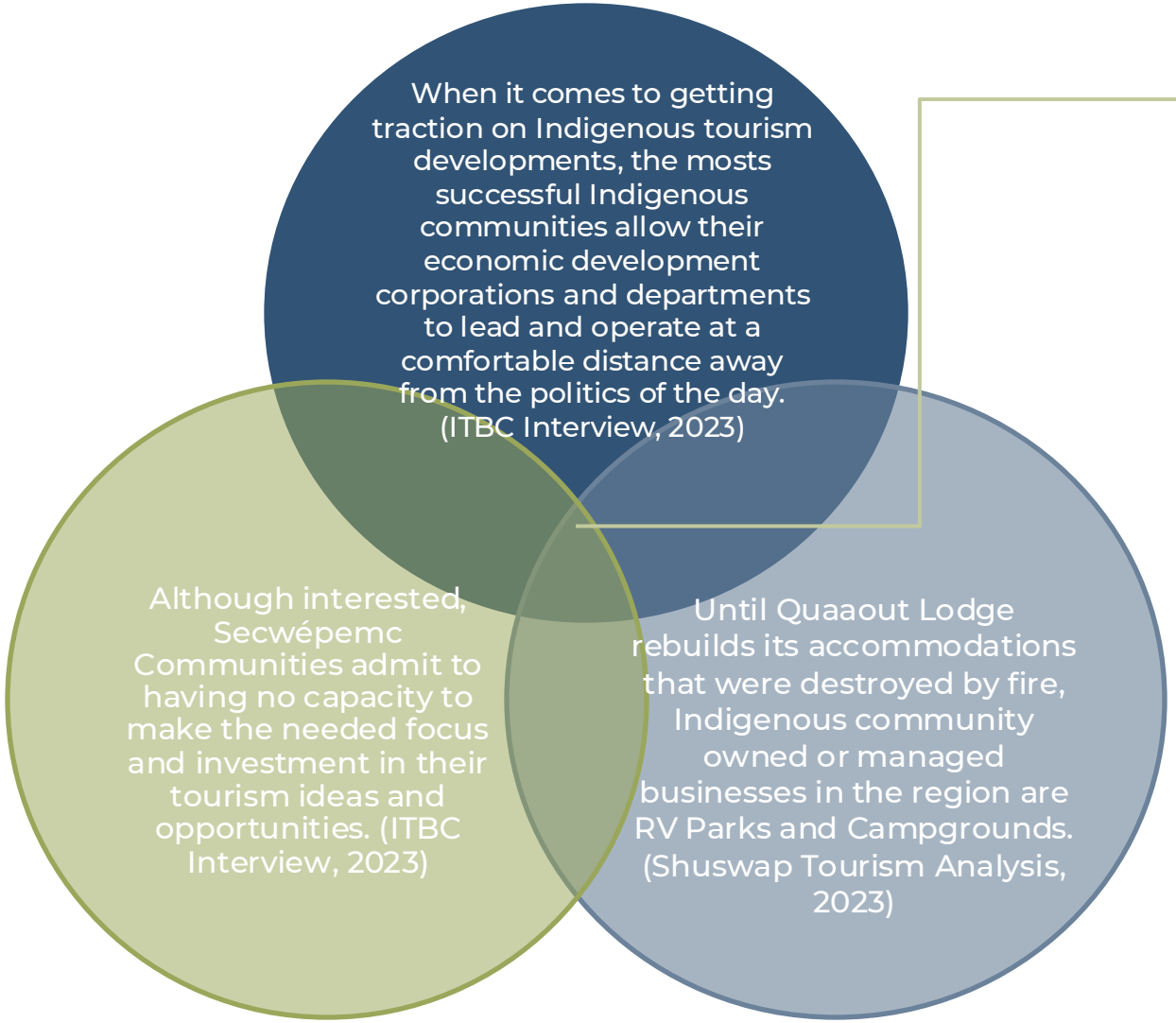
Foster the Secwépemc Indigenous Economy.

Destination Development and Marketing Focus

Economic Reconciliation

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.

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, 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.

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 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

Focus.

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.

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 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

Focus.

Foster the Secwépemc Indigenous Economy

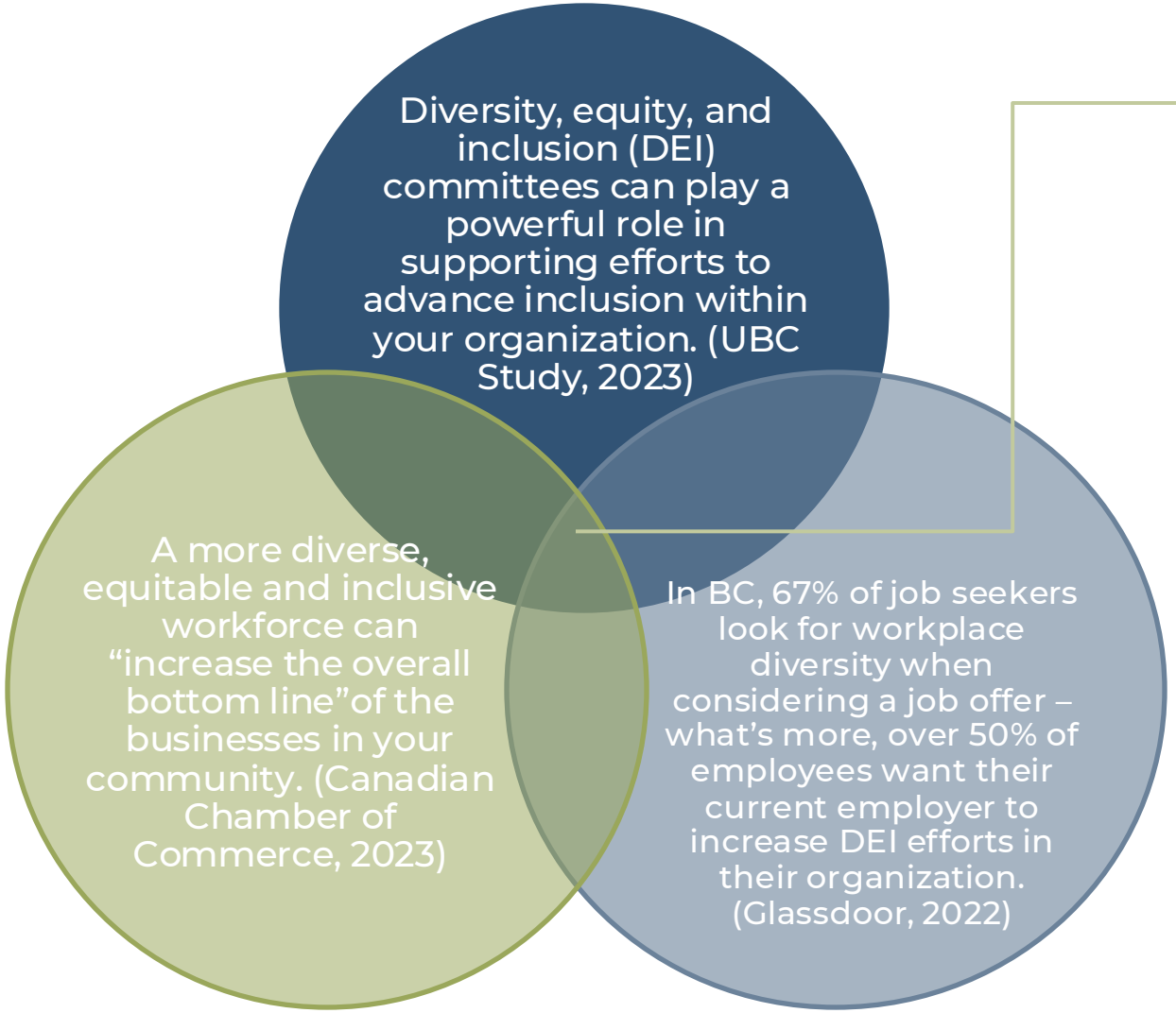
Work with Secwépemc entrepreneurs to develop and launch Indigenous wildcrafting tours that will simultaneously support the local Indigenous economy and the Shuswap region's food tourism market development focus.

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

Empower People to Achieve.

Destination Development and Marketing Focus

Strategic Insights.



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 minority groups in question, businesses hired more BIPOC employees than those that identify as LGBTQ+ or as a person with a disability.

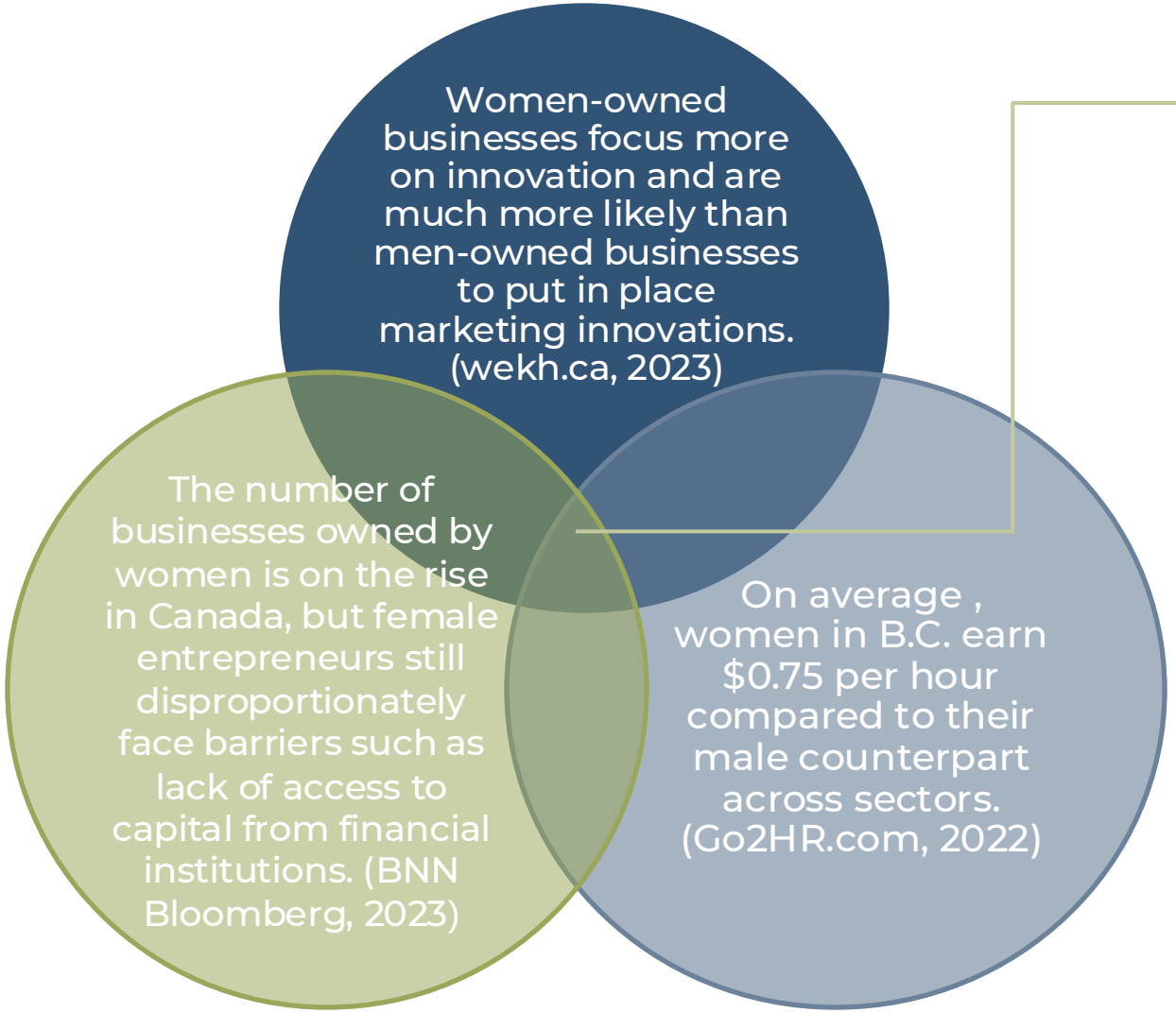
This provides a great opportunity to build platforms around hiring and welcoming more employee Diversity, Equity and Inclusiveness.

Meeting People "Where They're At".

Match economic development solutions against where Shuswap residents are at along the 'livelihoods continuum'.

Source: Community Economic Development Plan, City of Vancouver, 2017

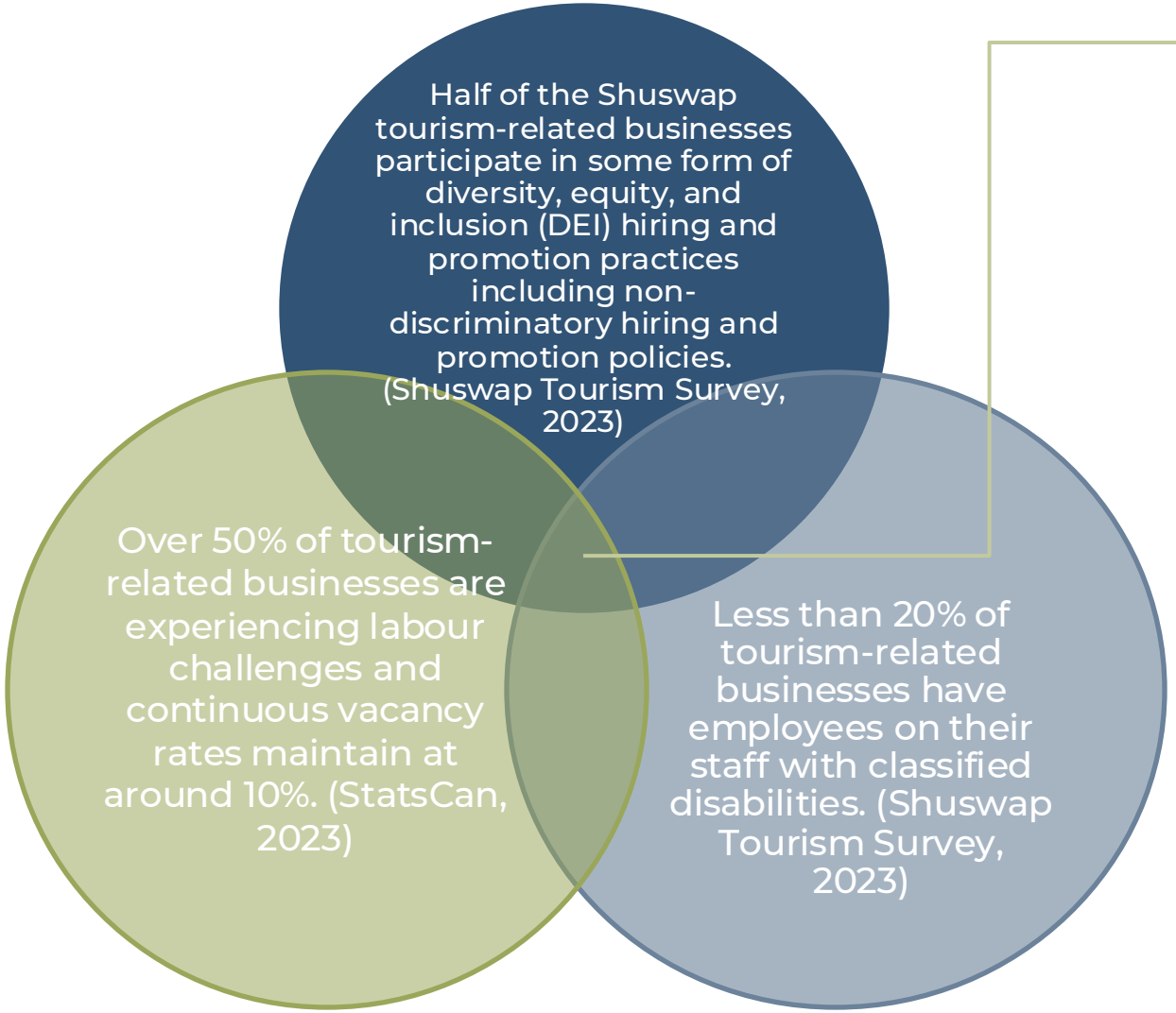
Strategic Insights.



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.

Strategic Insights.



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 Shuswap 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.

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)

Focus.

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.

Survey.

Appendix A

Tourism-Related Business Respondent Survey Results.

Shuswap Tourism Survey Audience.

N = 35

Tourism-Related Business

N = 26

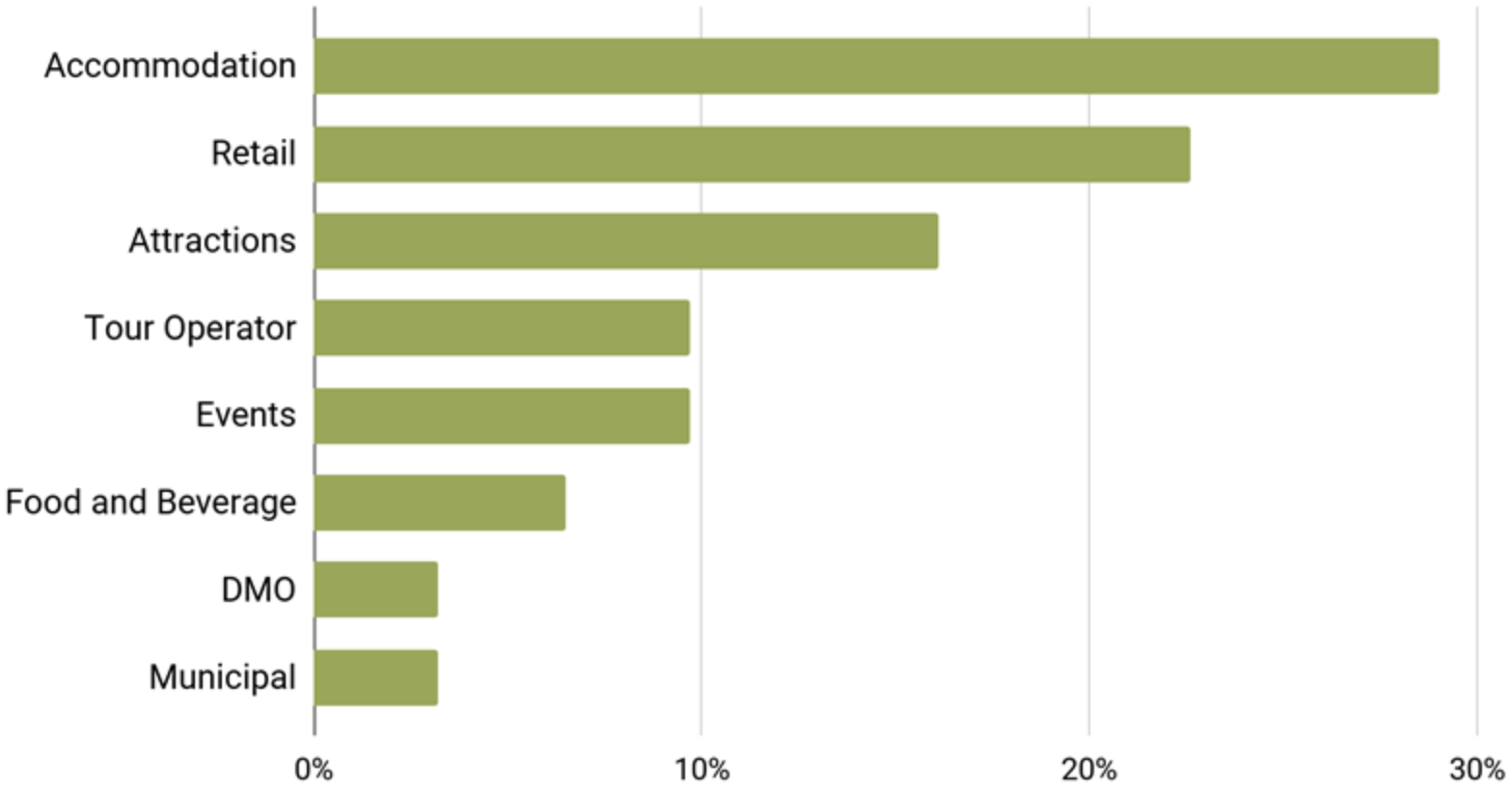
Tourism Champions

Source: Shuswap Tourism Destination Development Survey, 2023 - Q2 (N = 61)

Tourism-Related Business Profile.

Q4. How would you describe your business/organization?

N = 31

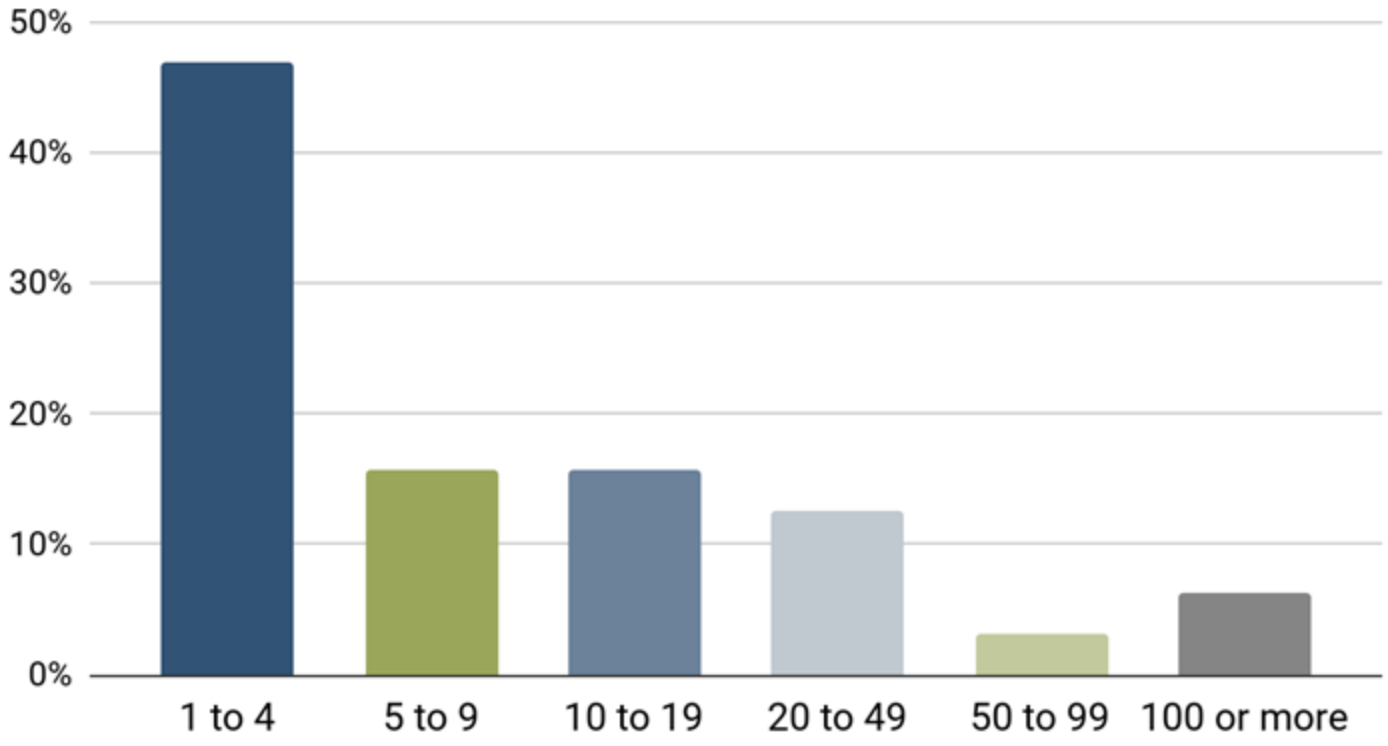


	N	%
Accommodation	9	29.0%
Retail	7	22.6%
Attractions	5	16.1%
Tour Operator	3	9.7%
Events	3	9.7%
Food and Beverage	2	6.5%
DMO	1	3.2%
Municipal	1	3.2%
Transportation	0	0.0%

Source: Shuswap Tourism Destination Development Survey, 2023

Q5. Please state the number of employees your business/organization has.

N = 32

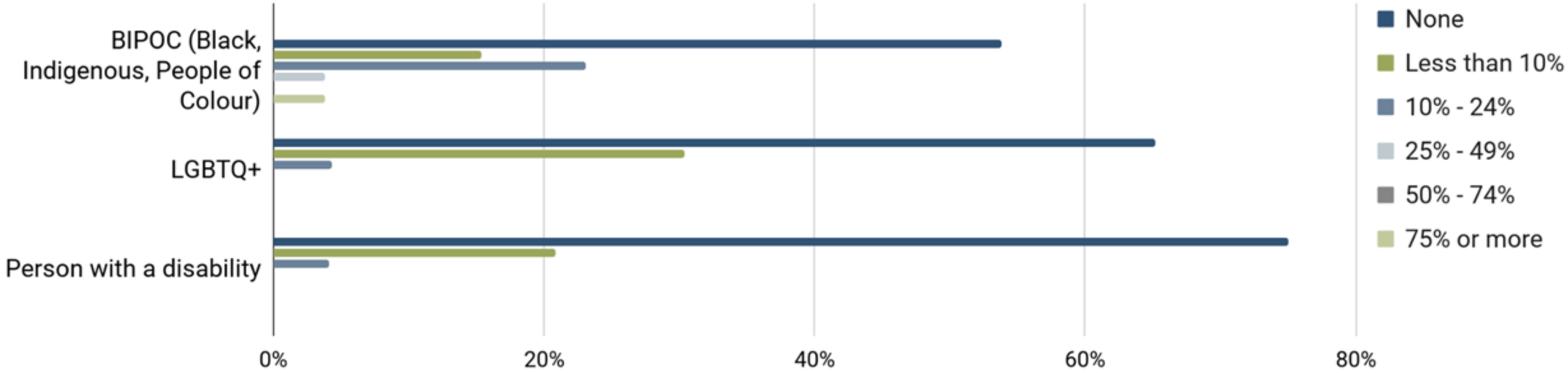


	N	%
1 to 4	15	46.9%
5 to 9	5	15.6%
10 to 19	5	15.6%
20 to 49	4	12.5%
50 to 99	1	3.1%
100 or more	2	6.3%

Source: Shuswap Tourism Destination Development Survey, 2023

Q6. What percentage of your employees identify with a minority group?

N = 26

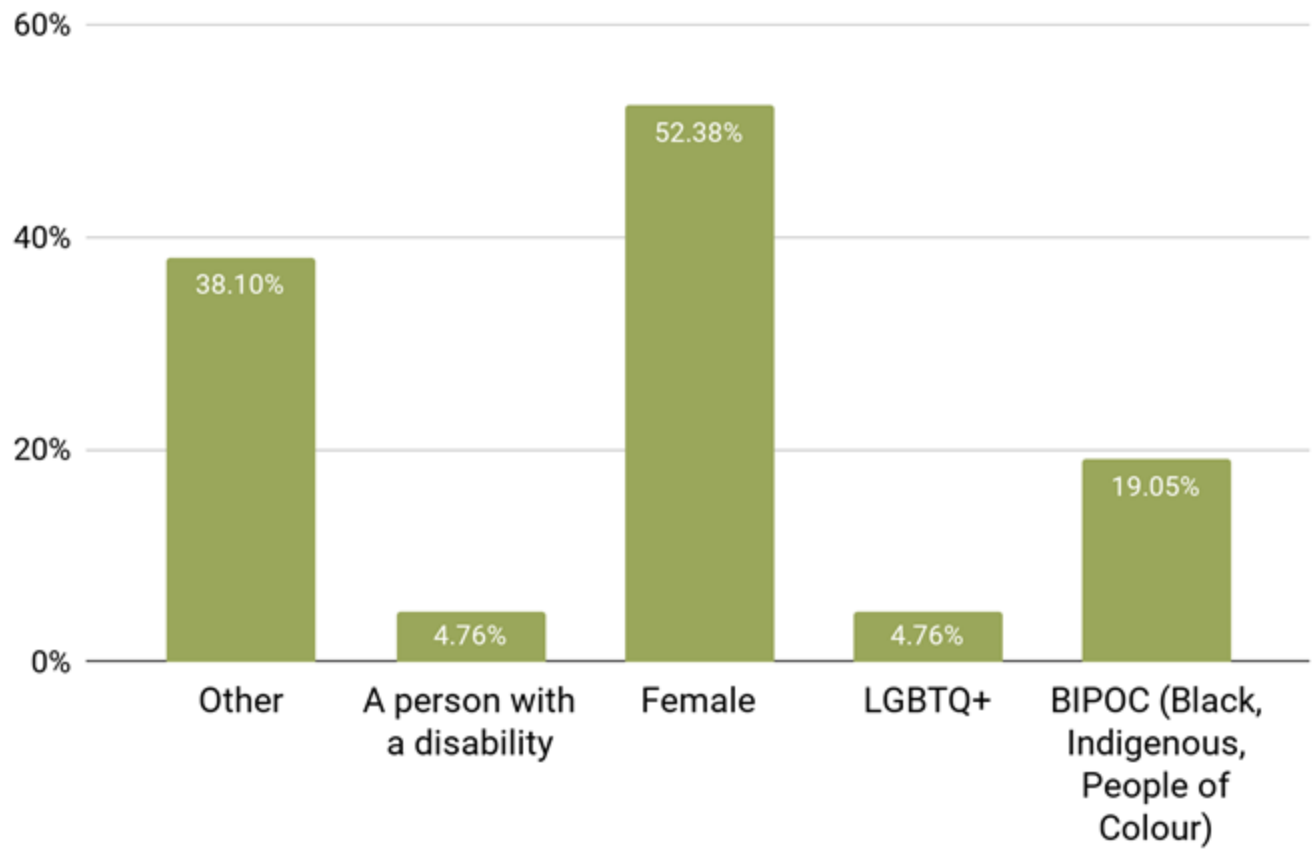


	BIPOC	LGBTQ+	Person with a disability
None	53.9%	65.2%	75%
Less than 10%	15.4%	30.4%	20.8%
10% to 24%	23.1%	4.4%	4.2%
25% to 49%	3.9%	0.0%	0.0%
50% to 74%	0.0%	0.0%	0.0%
75% to to more	3.9%	0.0%	0.0%

Source: Shuswap Tourism Destination Development Survey, 2023

Q7. Is your business owned/operated by someone who identifies as a minority?

N = 21



	N	%
Female	11	52.4%
BIPOC	4	19.1%
LGBTQ+	1	4.8%
Pearson with a disability	1	4.8%
None of the above	8	38.1%

Source: Shuswap Tourism Destination Development Survey, 2023

Accessibility and Business Diversity, Equity, and Inclusion.

- Business is somewhat accessible (69%)
- Business is accessible (19%)
- Business is not accessible (12%)
- 55% of businesses do not engage in DEI hiring / promotion practices

45% of businesses have DEI practices in place that include non-discriminatory hiring and promotion policies.

Source: Shuswap Tourism Destination Development Survey, 2023 - Q8 (N = 22), Q9 (N= 26)

Business Sustainability Practices.

91%
no sustainability awards or certifications

Measure or report on:

- Energy consumption (89%)
- Water usage (67%)
- Waste production (67%)
- Carbon emissions (0%)

62%
contribute to community or environmental groups

14%
provided details on sustainability efforts

Source: Shuswap Tourism Destination Development Survey, 2023 - Q10 (N = 21), Q11 (N= 9), Q12 (N = 21), Q13 (N = 6)

Q14. Who would be an ally in supporting sustainable tourism development?

N = 13

	N	%
Municipalities	**3**	**23.1%**
DMOs	**3**	**23.1%**
Community Champions	**3**	**23.1%**
Local Tourism Businesses	**3**	**23.1%**
Local Non-profits	2	15.4%
Tourism Consumers	1	7.7%

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.

Source: Shuswap Tourism Destination Development Survey, 2023

Q15. What are the strongest assets to tourism in the Shuswap region?

N = 17

1. Natural Environment

88%

2. Outdoor Recreation Experiences

Small town feel, friendly people, and houseboats were also mentioned to a lesser degree.

3. Local Food and Wine

4. Local Culture and History

Source: Shuswap Tourism Destination Development Survey, 2023

Q16. What would strengthen tourism in the Shuswap tourism region?

N = 16

- Active Transport Network
- Road Maintenance and Improvements
- Lake Access
- Family Friendly Activities
- Wildfire Response
- Accommodations
- Wastewater Management
- Building Out Shoulder Seasons

Source: Shuswap Tourism Destination Development Survey, 2023

Q17. What aspects of tourism in the Shuswap region could be improved upon?

N = 16

Inconsistencies in tourism marketing and development across the regions and seasonal fluctuations in demand were noted as main areas of opportunity. Limited accommodation supply (especially for camping and RVs), organized environmental sustainability efforts, wildfire control, and accessibility were also mentioned.

Source: Shuswap Tourism Destination Development Survey, 2023

Q18. What is your most common guest complaint?

N = 17

1. Wildfires

2. Poor Road Conditions / Infrastructure

3. Lacking Amenities

4. Seasonality / Limited Operating Hours

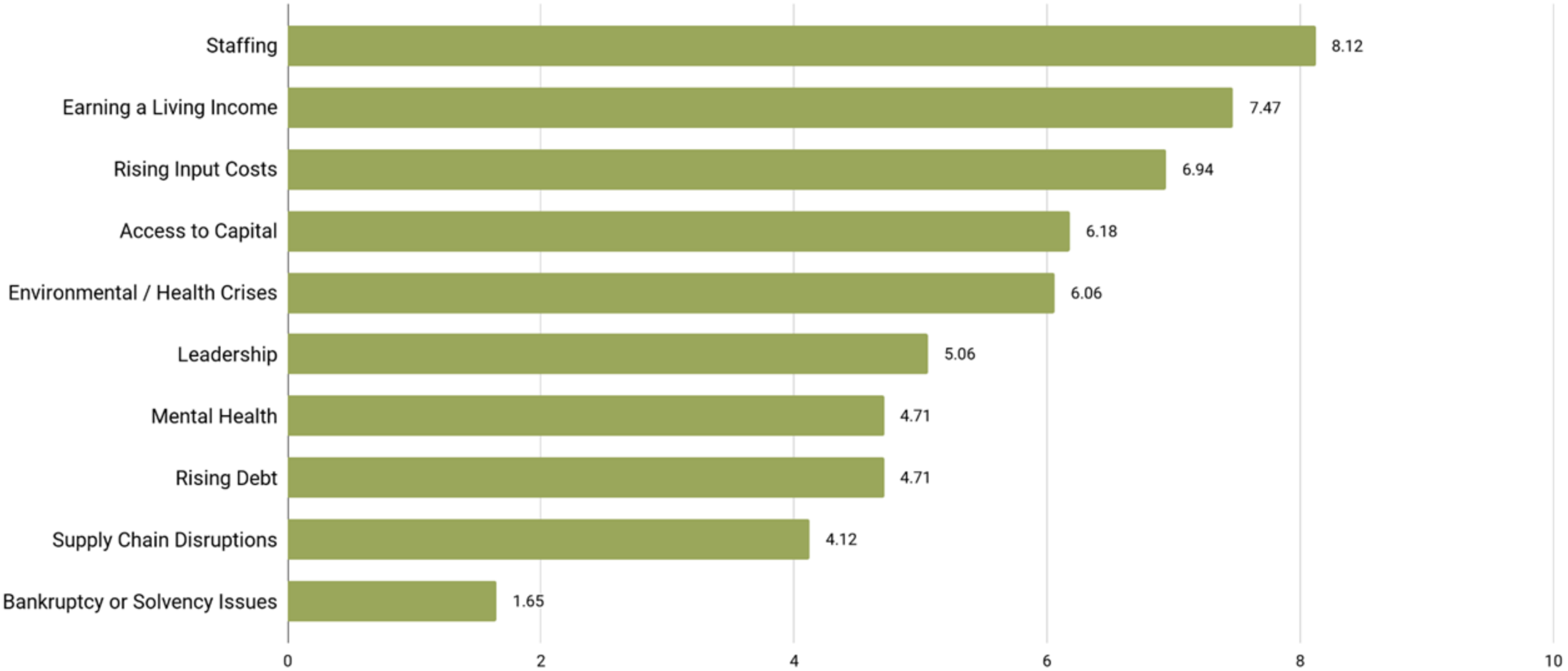
5. Weak Active Transport Network

Limited year-round family friendly activities, poor lake access, short staffing during peak seasons, high costs, and limited housing for staff also noted.

Source: Shuswap Tourism Destination Development Survey, 2023

Q19. In the next 5 years, what significant challenges will your business be facing?

N = 17



Source: Shuswap Tourism Destination Development Survey, 2023

Tourism Champion Respondent Survey Results.

Q21. What is special about the Shuswap region that you don't want to lose?

N = 12

Tourism champions do not want to sacrifice the natural environment nor their access to it. The small-town feel, friendly atmosphere, local food and wine scene, local culture and history, and peak summer tourism demand were also noted as special aspects in the Shuswap region.

The Shuswap region's natural environment and access to nature were ranked highest and most mentioned by respondents.

Source: Shuswap Tourism Destination Development Survey, 2023

Q22. What are the strongest assets to tourism in the Shuswap region?

N = 12

1. Natural Environment

50%

2. Outdoor Recreation Experiences

3. Sense of Community

Tourism champions agree with tourism-related businesses that the Shuswap region's natural environment is the strongest tourism asset, especially the lake.

Source: Shuswap Tourism Destination Development Survey, 2023

Q23. Who would be an ally in supporting sustainable tourism development?

N = 9

- Local Non-profits
- Indigenous Community
- Municipalities
- Community Champions
- Tourism Consumers

Unlike tourism-related businesses, tourism champions believe that local non-profits and the local Indigenous community would be the strongest allies towards sustainable tourism development.

Source: Shuswap Tourism Destination Development Survey, 2023

Q24. What would strengthen tourism in the Shuswap tourism region?

N = 12

The development of an active transportation network (expanded trail system with bike and boat rentals), improvement and maintenance of roadways, and increased lake access were most noted.

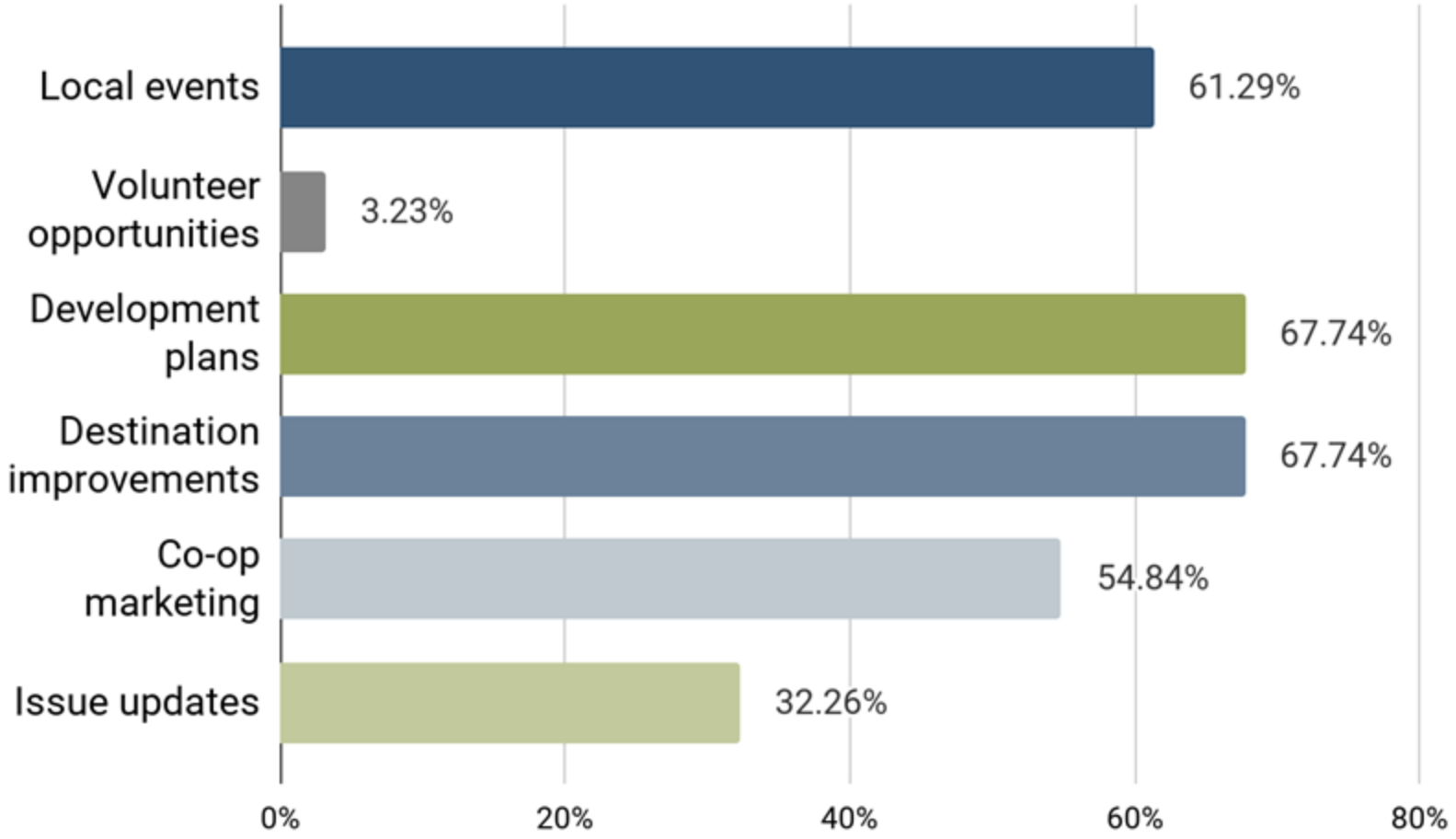
Shuswap tourism-related businesses and tourism champions both agree that an active transportation network would strengthen tourism in the region.

Source: Shuswap Tourism Destination Development Survey, 2023

Communication Preferences Survey Results.

Q26. What would you like Shuswap Tourism to communicate with stakeholders?

N = 31



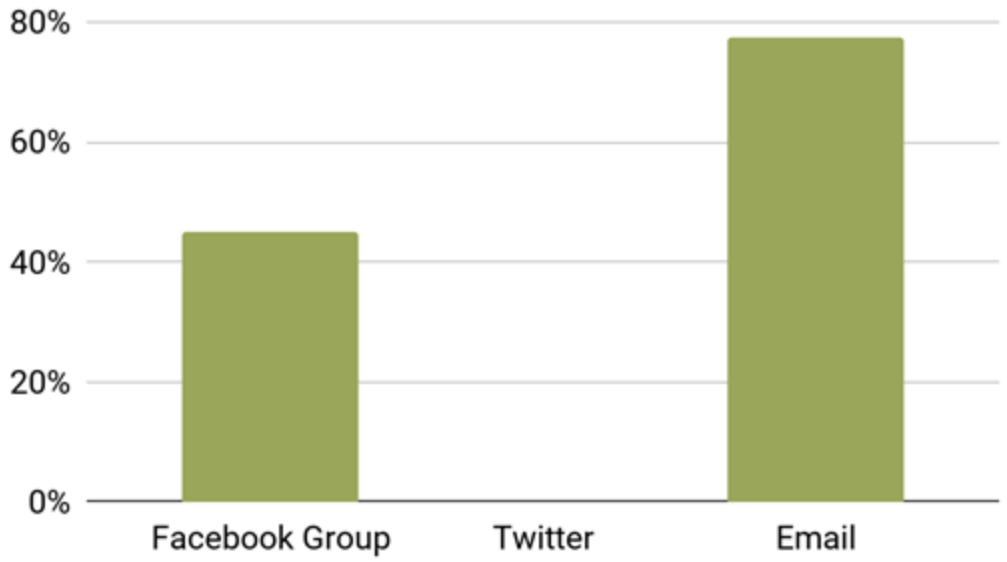
	N	%
Development Plans	**21**	**67.7%**
Destination Improvements	**21**	**67.7%**
Local Events	**19**	**61.3%**
Co-op Marketing Opportunities	**17**	**54.8%**
Issue Updates	10	32.3%
Volunteer Opportunities	1	3.2%

Source: Shuswap Tourism Destination Development Survey, 2023

Communication Preferences.

Q27. What communication channels do you prefer?

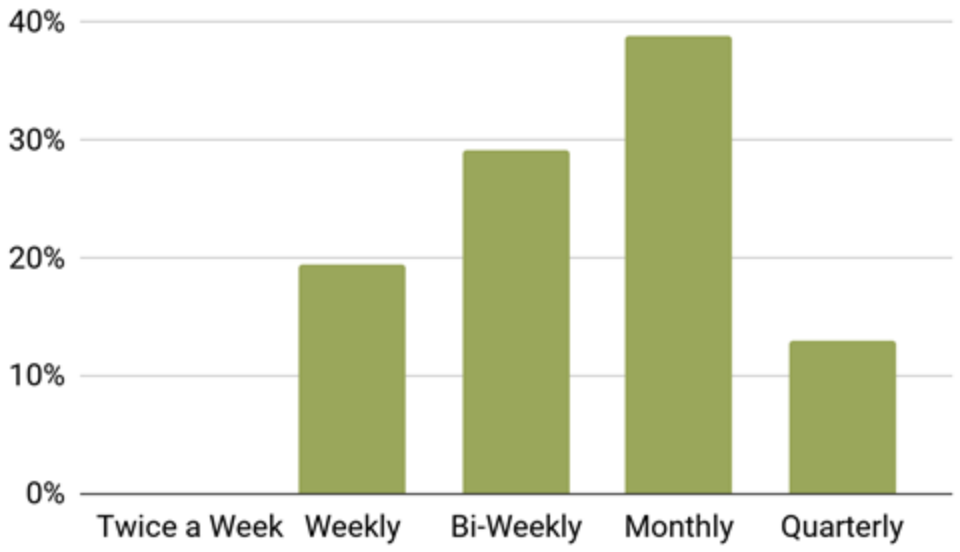
N = 31



	N	%
Email	24	77.4%
Facebook Group	14	45.2%
Twitter	0	0.0%

Q28. With what frequency would you like to receive communications?

N = 31



	N	%
Twice a Week	0	0.0%
Weekly	6	19.4%
Bi-Weekly	9	29.0%
Monthly	12	38.7%
Quarterly	4	12.9%

Source: Shuswap Tourism Destination Development Survey, 2023

Interviews.

Appendix B

Shuswap Tourism Stakeholder Interviews.

N = 15

Strengths

- Beautiful natural amenities
- Well-kept trails and recreation opportunities
- Friendly and enthusiastic community
- Unique perspective on competition that is more interested in collaboration
- Capacity to offer holistic, sustainable, and unified tourism experiences

Weaknesses

- Inconsistent marketing across sub-regions who operate independently
- Missing amenities (including accommodation supply, wayfinding, and adequate lake access)
- Poor awareness (lack of FAM trips)
- Threat of climate change and wildfires, cost of living, labour shortages

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q2. What is one of the most common things you hear from visitors to your business or visitors to your community about the Shuswap experience?

N = 8

	N	%
Beautiful Environment	**6**	**75.0%**
Friendly People	**3**	**37.5%**
Good Place to Live	2	25.0%
Limited Accommodations	2	25.0%
Wildfires	2	25.0%
Inconsistent Offerings	1	12.5%
Poor Lake Access	1	12.5%
Expensive	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q3. What do you think the Shuswap community is doing well?

N = 8

	N	%
Access to Nature	**5**	**62.5%**
Hospitality	**4**	**50.0%**
Events	2	25.0%
Target Market Alignment	2	25.0%
Collaborative Stakeholders	1	12.5%
Enthusiastic Community	1	12.5%
Summer Tourism Season	1	12.5%
Proximity	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q4. In the next 1-2 years, what external issues or trends do you think will have the biggest impact on your community?

N = 8

	N	%
Climate Change	**6**	**75.0%**
Cost of Living	**6**	**75.0%**
Staffing	1	12.5%
Economic Development	1	12.5%
Funding	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q5. What challenges does your community currently face?

N = 8

	N	%
Housing / Homelessness	**5**	**62.5%**
Limited Accommodations	**3**	**37.5%**
Staffing	**3**	**37.5%**
Inconsistent Marketing	2	25.0%
Lacking Amenities	1	12.5%
Water Management	1	12.5%
Seasonality	1	12.5%
Lack of Awareness	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q6. Who is doing tourism well, that Shuswap Tourism could learn from?

N = 8

- Vancouver Island
- BC Interior / Alberta
- BC Ski Hills
- Haida Gwaii
- Yukon
- Newfoundland
- New Zealand

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q7. From the perspective of your business, what opportunities or experiences could be capitalized on?

N = 8

	N	%
Unified Marketing Approach	**5**	**62.5%**
Upgrade Trails	**2**	**25.0%**
Cultural Districts	1	12.5%
Indigenous Tourism	1	12.5%
Regenerative Agriculture	1	12.5%
Backcountry Development	1	12.5%
Accommodations	1	12.5%
Events	1	12.5%
FAM Tours	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q8. Could you tell me about your sustainability practices?

N = 8

- Waste Management
- Sourcing Locally
- Clean Energy
- Trail Standards
- Indigenous Partnerships

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.

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q9. Tell me about your competition.

N = 8

Respondents uniquely “don’t look at it as competition” rather they “think about partners”. Tourism stakeholders are more interested in finding ways to collaborate with other businesses and destinations that offer comparable products and services as they see more value in this than competing with them.

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q10. What do you think the top priority should be for Shuswap Tourism in both the short and long term?

N = 8

	N	%
Unified Marketing Approach	**5**	**62.5%**
Building Shoulder Seasons	**3**	**37.5%**
Indigenous Tourism	1	12.5%
Sustainable Tourism	1	12.5%
Accommodations	1	12.5%
Building Capacity	1	12.5%
FAM Tours	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Q11. What are ways that Shuswap Tourism could build out tour experiences that attract the right kind of traveller to the area? What resources would they need?

N = 8

	N	%
Guided Experiences	**5**	**62.5%**
Shoulder Seasons	2	25.0%
Marketing	2	25.0%
Packages	2	25.5%
Accommodations	1	12.5%
Lake Transportation	1	12.5%

Source: Shuswap Tourism Stakeholder Interviews, 2023

Focus Groups.

Appendix C

Shuswap Tourism Focus Groups.

N = 3
Sunnybrae

N = 5
Sorrento

Focus Groups.

Overview & Key Findings

- 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 municipal regulations. CSRD 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.

Focus Group Findings.

The region has a unique small town feel that fosters a sense of community and an atmosphere of collaboration among local businesses.

Heart and Soul of Destination

- Local Collaboration
- Small Town Feel
- Friendly People
- Natural Environment

Shuswap Lake

underutilized with opportunity to leverage for better transportation with public access docks

Opportunities for Progress

- Municipal Regulations
- Limited Accommodations
- Resident Sentiment

Source: Shuswap Tourism Focus Group, 2023

Focus Group Findings.

What do you see the next 3 years looking like in Shuswap?

- Tourism Infrastructure
- Local Arts & Culture
- Protecting the Lake
- Soft Adventure Market

Tourism stakeholders are excited about opportunities for community building. They see Agricultural Tourism, Recreation Experiences, and Accommodations as the biggest opportunities in the Shuswap region.

Source: Shuswap Tourism Focus Group, 2023

Key Insights and Aha Moments.

Appendix D

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 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 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.

Destination Strengths.

- **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 regions 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 tourism industry thrives on the genuine friendliness of its community. Visitors recognize the welcoming nature of the Shuswap, 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.

Destination Weaknesses.

- **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 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 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 the Shuswap Tourism’s message and the missed opportunity to capitalize on the community's collaborative nature.

Destination Weaknesses.

- **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 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 tourism industry, emphasizing the need for strategic solutions to address labour-related challenges.

Destination Threats.

- **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.

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 is 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.

Destination Opportunities.

- **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.

Destination Opportunities.

- **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 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 Brand Audit.

Appendix E

Destination Audit Focus.

1

Culture

2

Market Analysis

3

Marketing Mix

Cultural Identity.

Great Destinations are Always Place Based.

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 explain the dynamic tension between *regions* and communities.

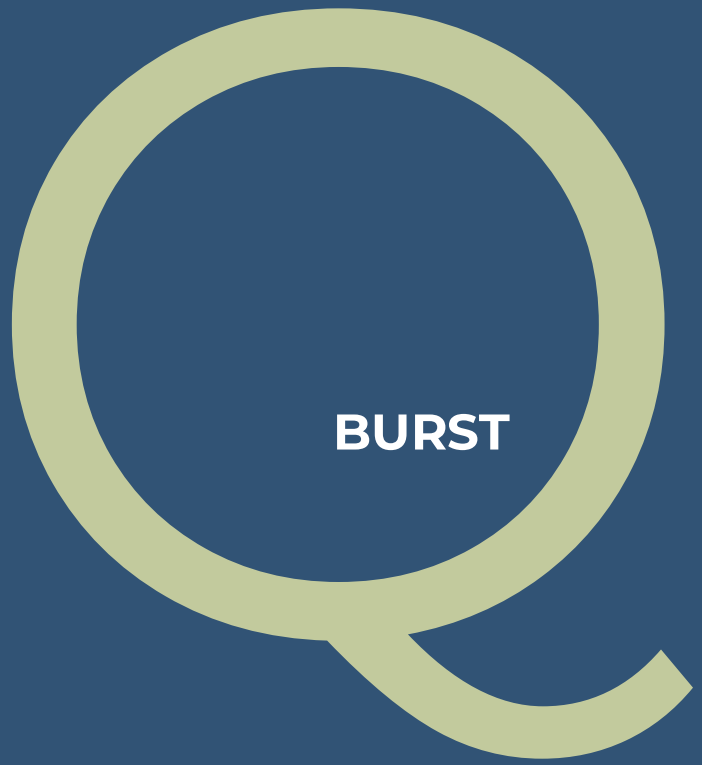
As destination managers, what do you do well?

We have a lot of people that promote our community, so there is a lot of content, we just need more content in the offseason	We developed 12 visitor kiosks throughout our region to assist visitors with their vacation experience once they have arrived.	We have good knowledge base of marketers, so there is no shortage of great ideas, and interesting solutions	We welcome everyone to our business, we are inclusive, we are respectful, friendly and are very proud of the service we offer.
Epic event every 4 years with the Sockeye Salmon spawn - engaging our community members in the event	host schools and international visitors 5 months of the year with free programs	We have a comprehensive social media marking program in place on Facebook, Instagram and Twitter (X)	I try to be a great leader to my team, lead by example.
We provide ambassador training to local businesses so that their staff can enhance the visitor experience.	We in Sicamous are great at welcoming all of our visitors in the summer months.	Let people know of different events that we have going on in the community	Showcase the shoulder season opportunities available in the area to generate more visitation
Share events that our chamber hosts throughout the season when we are not active	Love our community, as a region the sense of pride and love for our region shows in most of what is put out there.	Really well informed on local events and activities	Work with the community to figure out how to make their tourism Experiences better
attend community events to educate	Expert product knowledge	Create itineraries for shoulder season attractions in our community.	Spread the word thru our social channels
Connect with our communities	Market houseboating well.	We share our story	Connect people
We create authentic experiences based on our cultural strengths and work to build itineraries based on people's travel values		I point people in the right direction of doing fun activities that are unique for the area. I also make sure that everyone is happy and enjoying themselves	

Source: Shuswap Destination Brand Audit Workshop, 2023

Regional Collaboration.

Source: Shuswap Destination Brand Audit Workshop, 2023



Type as many questions as you can think of in 3 mins

Q BURST.

Q Collaborate to Compete

The Shuswap region has so much to offer. We're crazy busy in the summer, but the rest of the year, it still feels like we're batting below our weight class. The South Okanagan gets so much more attention by the industry. If we could work more effectively and efficiently together, we could supersize our budgets and marketing impact. Salmon Arm and Sicamous are making a strong impact, but it still feels like we're not doing as well as our competitors to the South and East.

how do we compete with communities with massive budgets for market share?	How can a not for profit allocate money for marketing with little revenues?	How do we promote out winter trails better? Lit xc ski trails. Snowshoe trails. Winter Wine, Beer, Cider Tours.	Is there a way we can extend the summer season
what draws people here vs. there?	What are the barriers to travel in the shoulder seasons?	What is our competitive advantage in the offseason?	What kind of NEW tourism experience can be created for Fall/Winter?
What industries can we better support outside of the summer season?	How do we make an impact vs already well know regions	How do we work with other partners to attract visitors for nordic visitors?	How can we creat more events in non summer season?
Can all the regions adapt a more cohesive branding under the Shuswap Tourism Umbrella?	What other seasons have events to draw to the region?	what drives travel in the winter?	How do our assets compare to neighbouring communities in the offseason
what is our unique value proposition that outweighs neighbouring communities?	How do we encourage our local businesses to stay open in the off season? How do we work together more effectively as the whole Shuswap?	why are people travelling in the winter?	What role can our chamber play?
What kind of products can we attract people within the off-season? Are we utilizing our unique assets to their fullest in the off-season? Can we attract people with food/personal growth festivals?		How can we partner on more events to create a larger draw? How can we build our off season visitation? How can we promote our areas more effectively? How can we stand out more than the South Okanagan?	

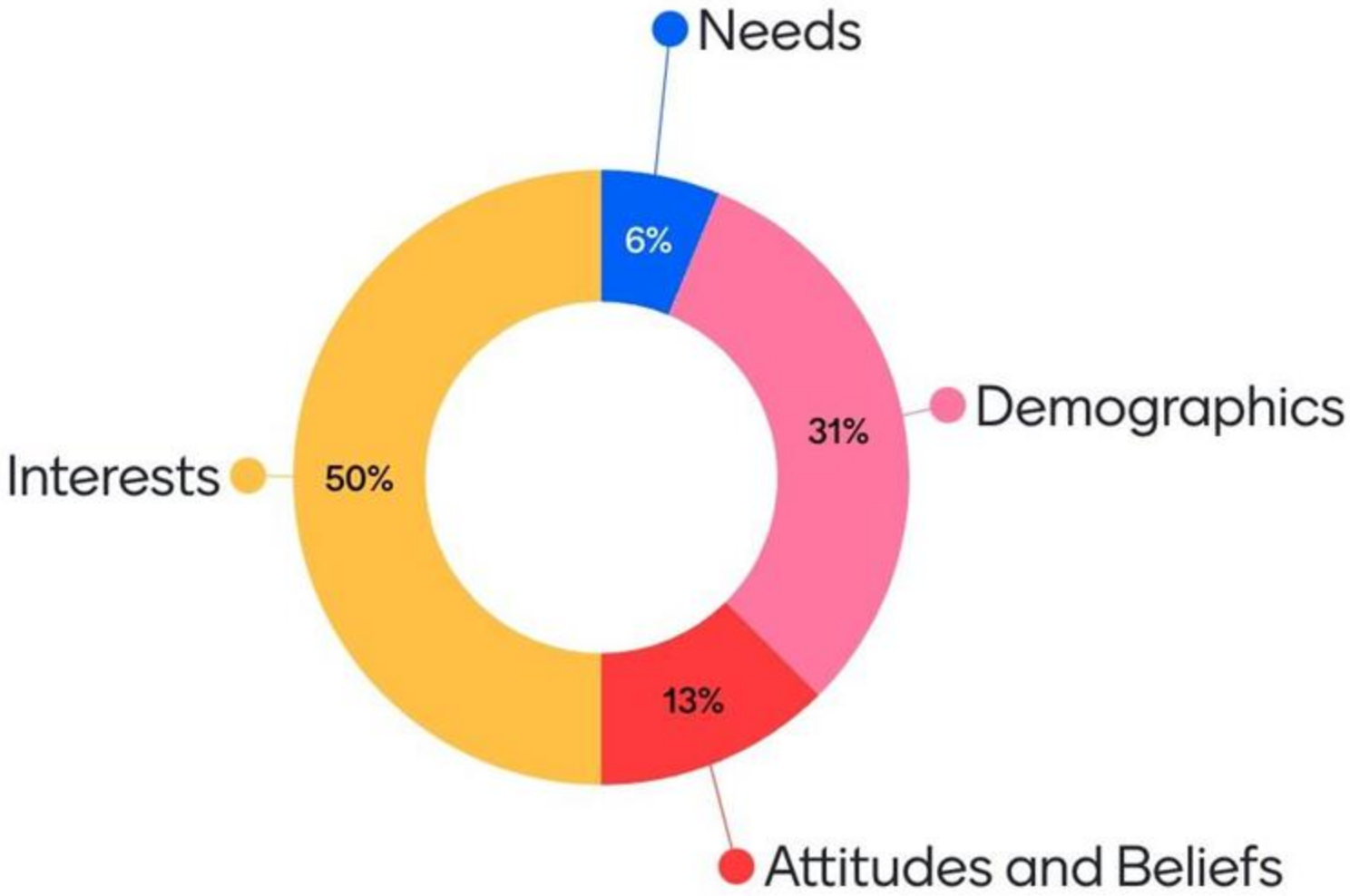
Source: Shuswap Destination Brand Audit Workshop, 2023

Market Analysis.

Market Segmentation.

Source: Shuswap Destination Brand Audit Workshop, 2023

What is your MAIN market segment focus?



Source: Shuswap Destination Brand Audit Workshop, 2023

How do you want future visitors to feel about the Shuswap?

Enthusiastic	Emotionally connected to the area, leave feeling refreshed and reconnected with there family and friends.	I want them to feel like they found a place that is big enough to offer what they need and small enough to care that they feel welcomed, seen and appreciated.
Nostalgic	A place to relax and unwind from hectic city life.	I want coming to the Shuswap to be a yearly tradition all year round, for each season. to pass on and share with siblings and friends
A place where visitors can reconnect with loved ones and nature.	The place to unwind, reconnect, work on personal well-being. Simple pleasures. Unpretentious. Affordable. Amazing.	Creating someone's new or renewed "happy place"
Creating authentic bonding experiences	Happy - but I am conflicted with appealing to the "I" mentality of the visitor making decision solely for themselves and not looking at the region and all that it offers for everyone.	At peace - being with nature and all life that the land supports
A place where you are warmly welcomed.	This is a place of integrity, care for others, respect for diversity and cultures, serious about changing our lives to be able to more appropriately, accountably, sustainably live in this land.	

Source: Shuswap Destination Brand Audit Workshop, 2023

Marketing Mix.

Emotional Brand Market Power.

Leveraging Your Destination Brand.

Source: Shuswap Destination Brand Audit Workshop, 2023

Travel's Path-to-Purchase (P2P).

"Today's customer journey is so complex that it looks more like the plot of a "whodunit" than a decision to buy a new jacket. Consumers have more choice than ever before. They research and shop across multiple devices, multiple touch points, around the clock — both online and off."

- Google

Marketing Along the P2P.

Stages 1-3
Channel Tactics

- Video
- Radio
- OOH
- Connected TV
- Print
- Social Display

Stages 4-5
Channel Tactics

- SEO
- Paid Search
- Itinerary Building Apps
- Media Relations
- Blogs
- Key Influencers
- Social Posts
- Social Lead Gen
- Destination Websites
- Ratings and Reviews
- AirBnB | VRBO

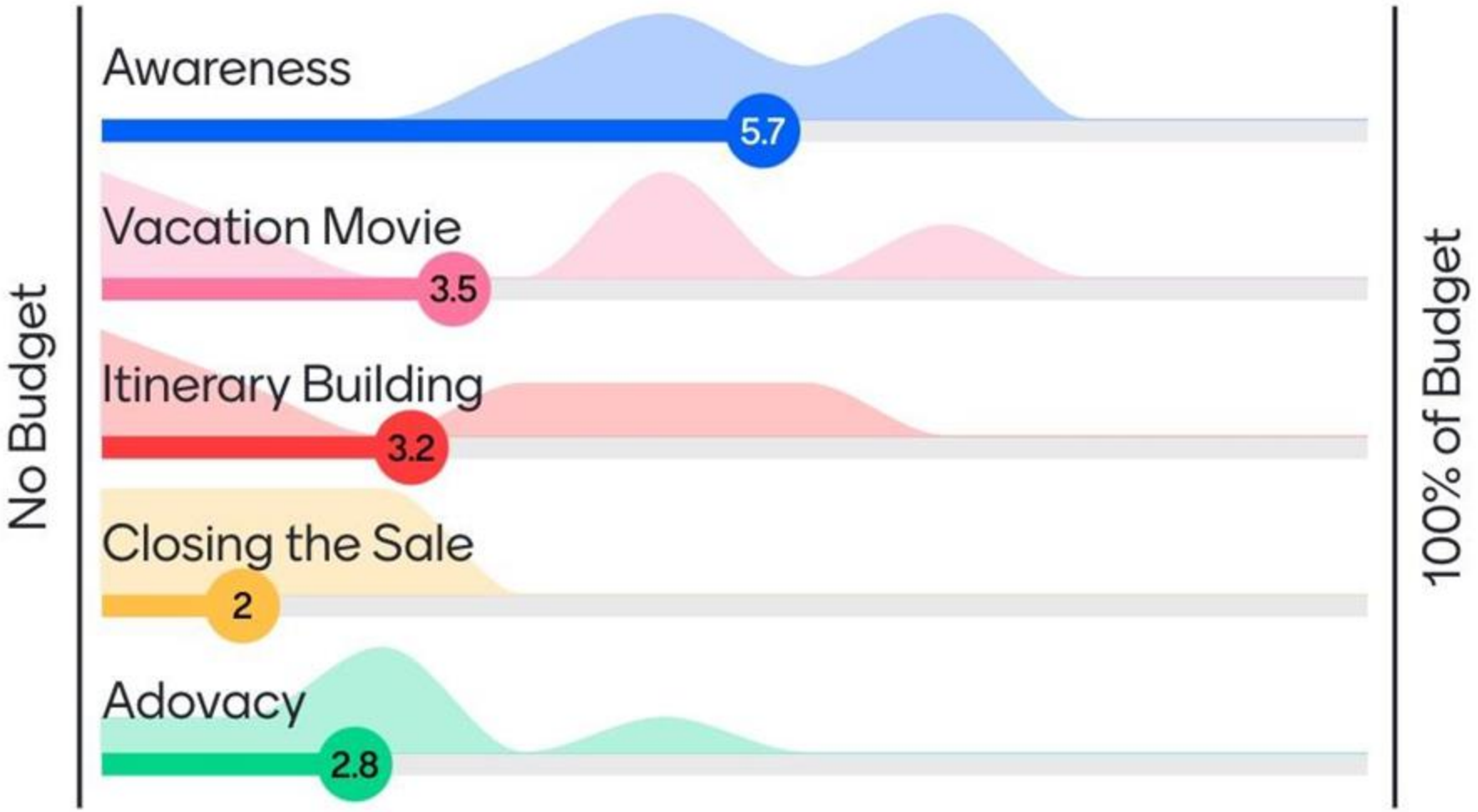
Stages 6-7
Channel Tactics

- SEO
- Paid Search
- Remarketing
- Hotel Booking Engines
- Online Travel Agency (OTA)
- AirBnB | VRBO
- Operator Website
- Visitor Info Centre (VIC)

Stages 8-9
Channel Tactics

- Visitor Info Centre (VIC)
- Front Desk Attendants
- Cab Drivers
- Local Ambassadors
- Social Media Engagement

Marketing Communications Channel Weight.



Source: Shuswap Destination Brand Audit Workshop, 2023

Market Performance and Trends.

Appendix F

2022 ON THE PATH TO RECOVERY

DESTINATION CANADA

LEGEND

Overnight arrivals

2019 | 2022

% current proportion of 2019 levels

After reopening its borders to international travel in late summer 2021, Canada removed all COVID-19 border regulations on October 1, 2022.

Visitor arrivals gradually improved throughout the year to bring 2022 annual arrivals to 58% of 2019 levels.

UNITED STATES
15.0M | 9.1M | 61%

MEXICO
487K | 347K | 71%

UK
863K | 588K | 68%

FRANCE
663K | 463K | 70%

GERMANY
415K | 249K | 60%

CHINA
708K | 64K | 9%

JAPAN
251K | 51K | 20%

SOUTH KOREA
254K | 74K | 29%

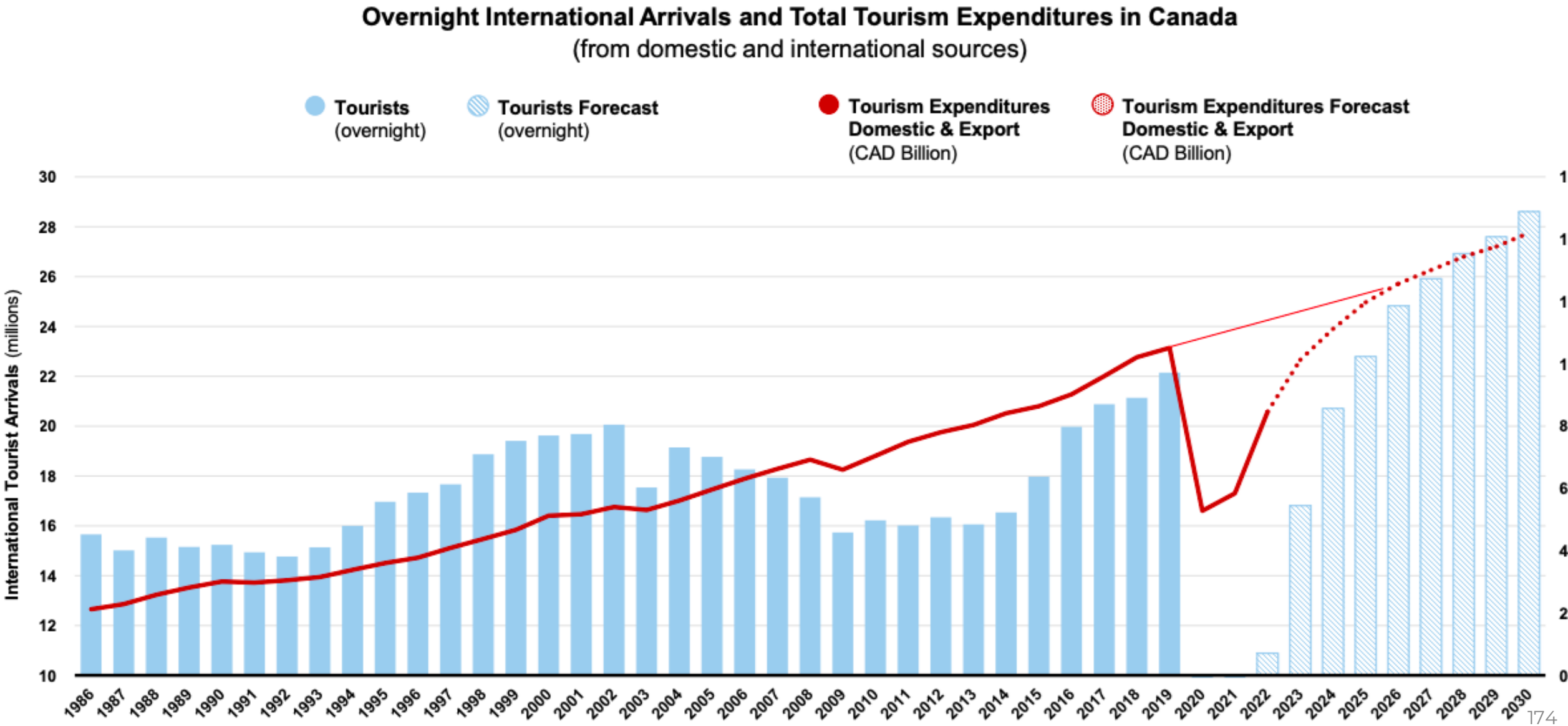
AUSTRALIA
351K | 159K | 45%

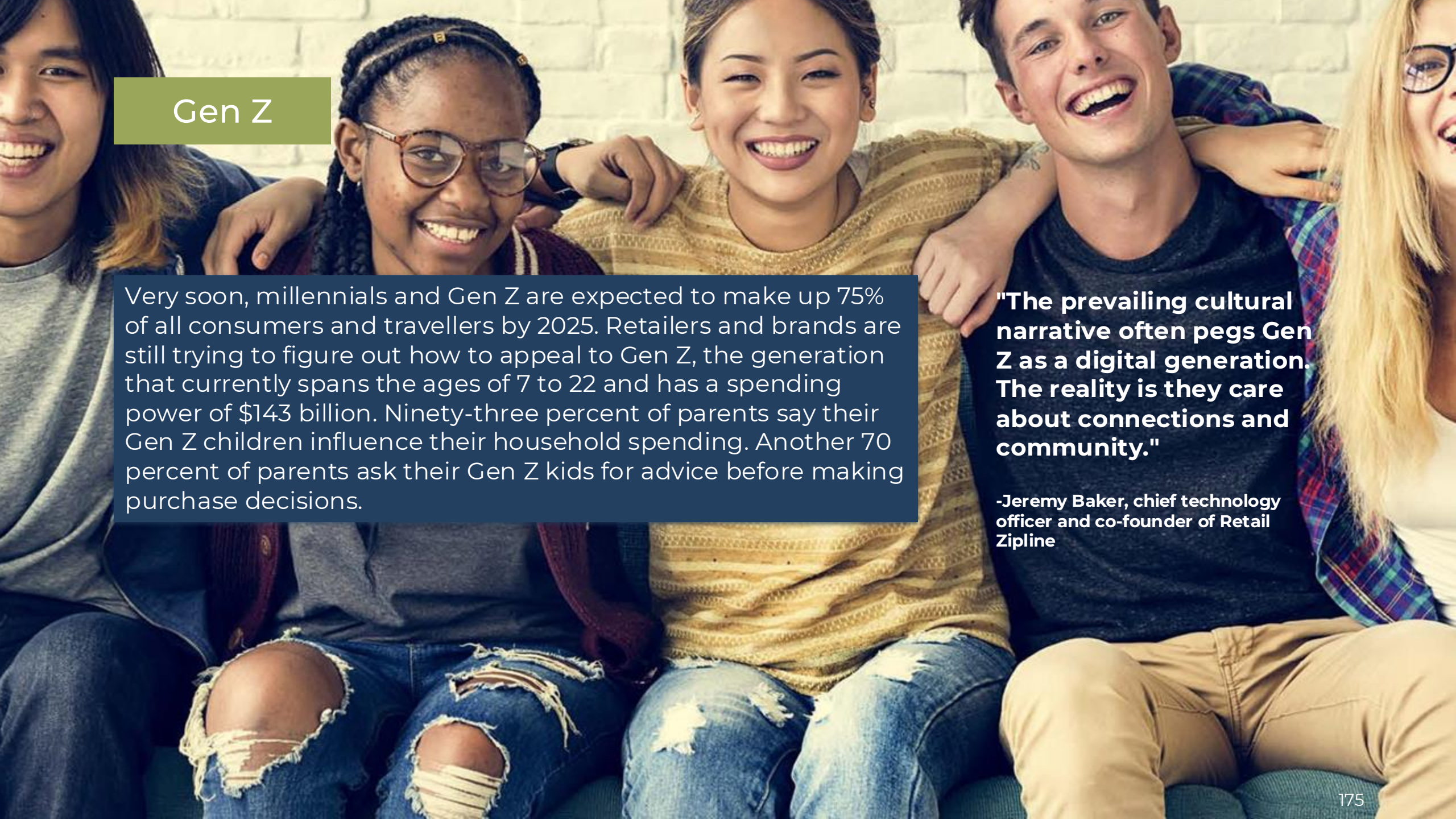
TOTAL ANNUAL GLOBAL ARRIVALS
22.1M | 58%

Monthly overnight arrivals

4M

Tourist expenditures and international arrivals set to return to long-term growth trend by 2026





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. 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.

"The prevailing cultural narrative often pegs Gen Z as a digital generation. The reality is they care about connections and community."

-Jeremy Baker, chief technology officer and co-founder of Retail Zipline

Arts & Culture

Risk...can be the catalyst that propels you forward.

- Robert Redford

Hiking is the New Yoga

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

Competitive Analysis and Sources of Advantage.

Appendix G

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.

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

Competitive Position and Profitability

Competitive Advantage

- Product Differentiation
- Service Differentiation
- Reputation

Competitive Intelligence

- Master Plans
- Competitor Benchmarking
- Perceptual Mapping

Industry Attractiveness

- Competitor Entry/Exit
- Buyer/Supplier Power
- Substitutes/Rivalry

Competitive Set Overview.

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

As a multiseason destination that offers lakeside lifestyle as a primary tourism experience, Shuswap region is most comparable to Vernon, Revelstoke, Golden, and Nelson.

Competitive Set Overview.

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

Competitive Set Overview.

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

Unlike its competitors, Shuswap is not currently marketing the MICE industry, sports tourism, nightlife, luxury, or accessible travel experiences. Shared weaknesses amongst competitors include seasonal fluctuations, poor transportation infrastructure and accessibility, and limited market visibility. Uniquely, however, the Shuswap region also suffers from a fragmented marketing strategy across its participating regions.

Product and Experience Analysis.

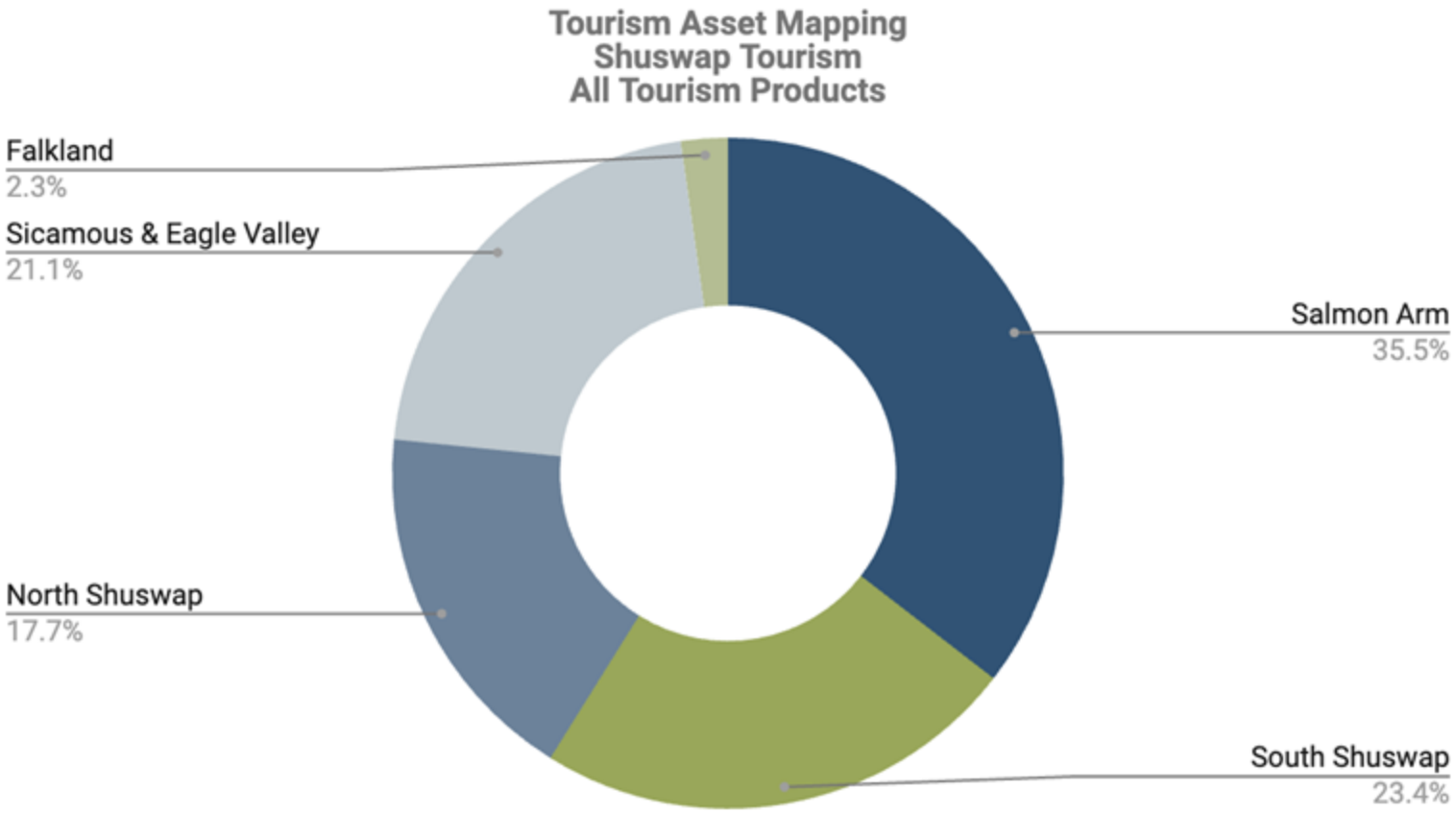
Appendix H

Tourism Asset Mapping.

Overview

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.

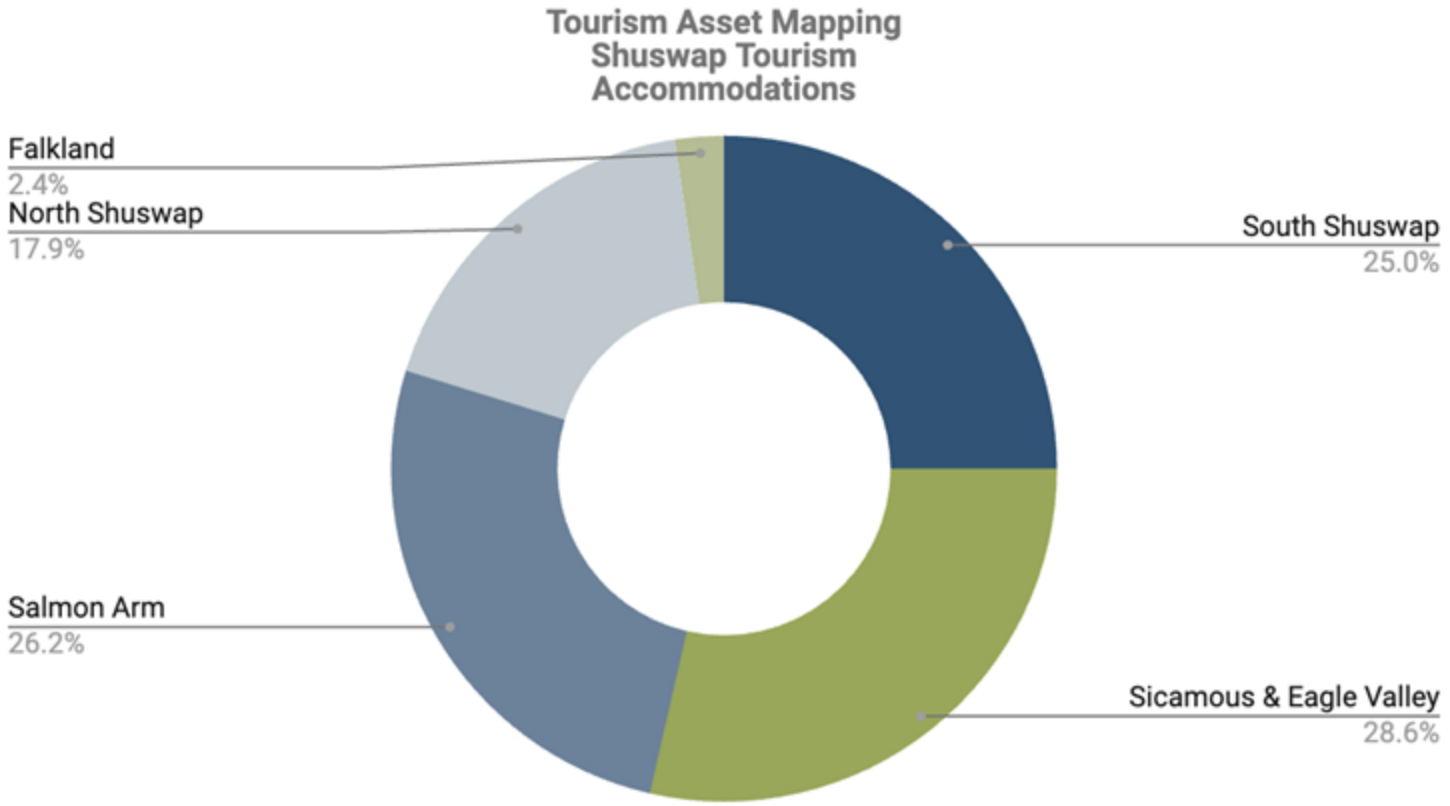


What's the Story?

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



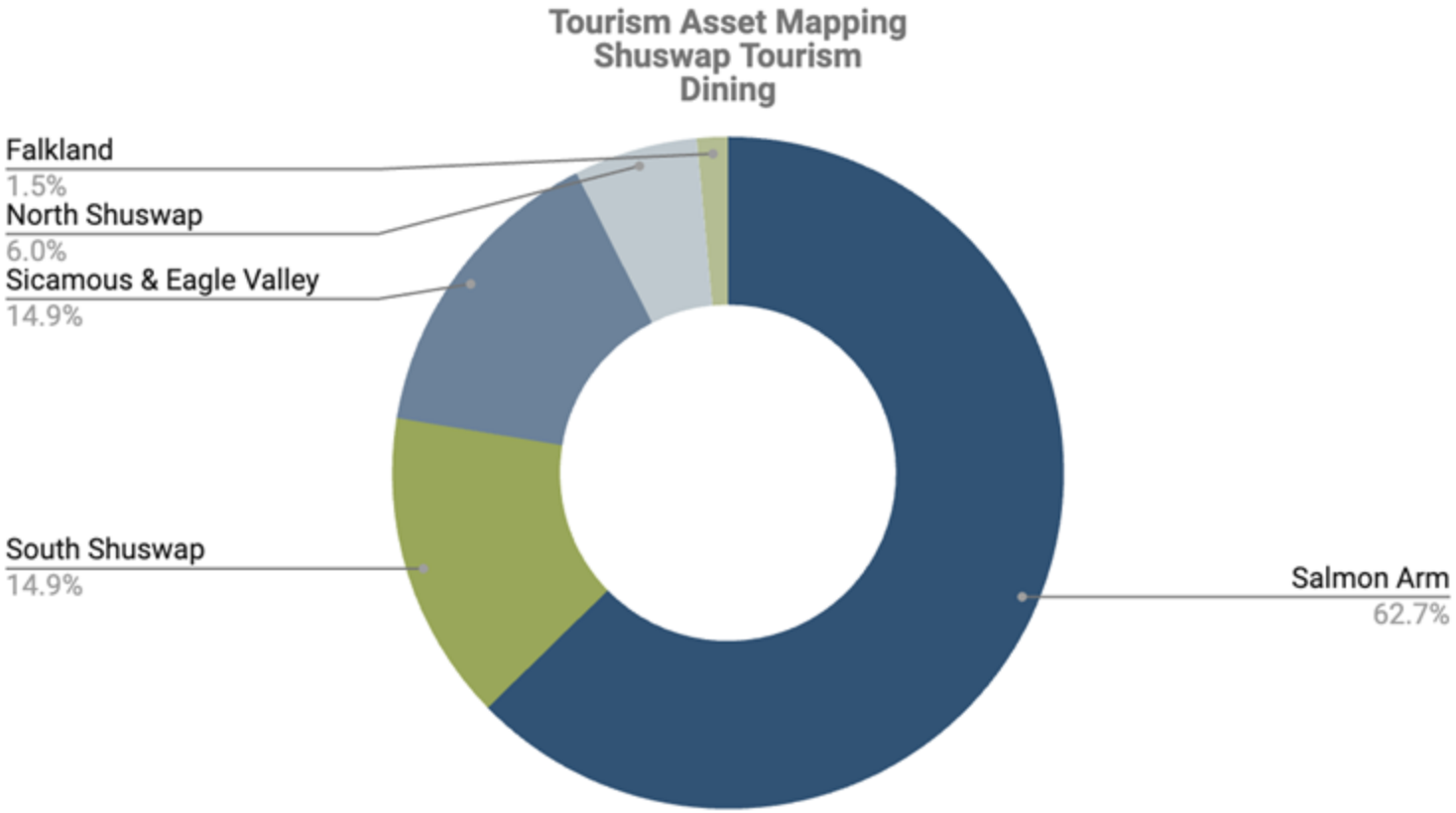
Region	AirBNB & Vacation Rentals	Bed & Breakfast	Cabins & Cottages	Hotels & Resorts	Houseboats	Motels	RV Parks & Camp-grounds
Falkland	0.0%	0.0%	0.0%	0.0%	0.0%	16.7%	3.8%
North Shuswap	30.0%	16.7%	18.8%	9.1%	0.0%	16.7%	19.2%
Salmon Arm	20.0%	33.3%	18.8%	54.5%	0.0%	0.0%	26.9%
Sicamous & Eagle Valley	10.0%	41.7%	18.8%	18.2%	100.0%	50.0%	26.9%
South Shuswap	40.0%	8.3%	43.8%	18.2%	0.0%	16.7%	23.1%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What's the Story?

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 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.



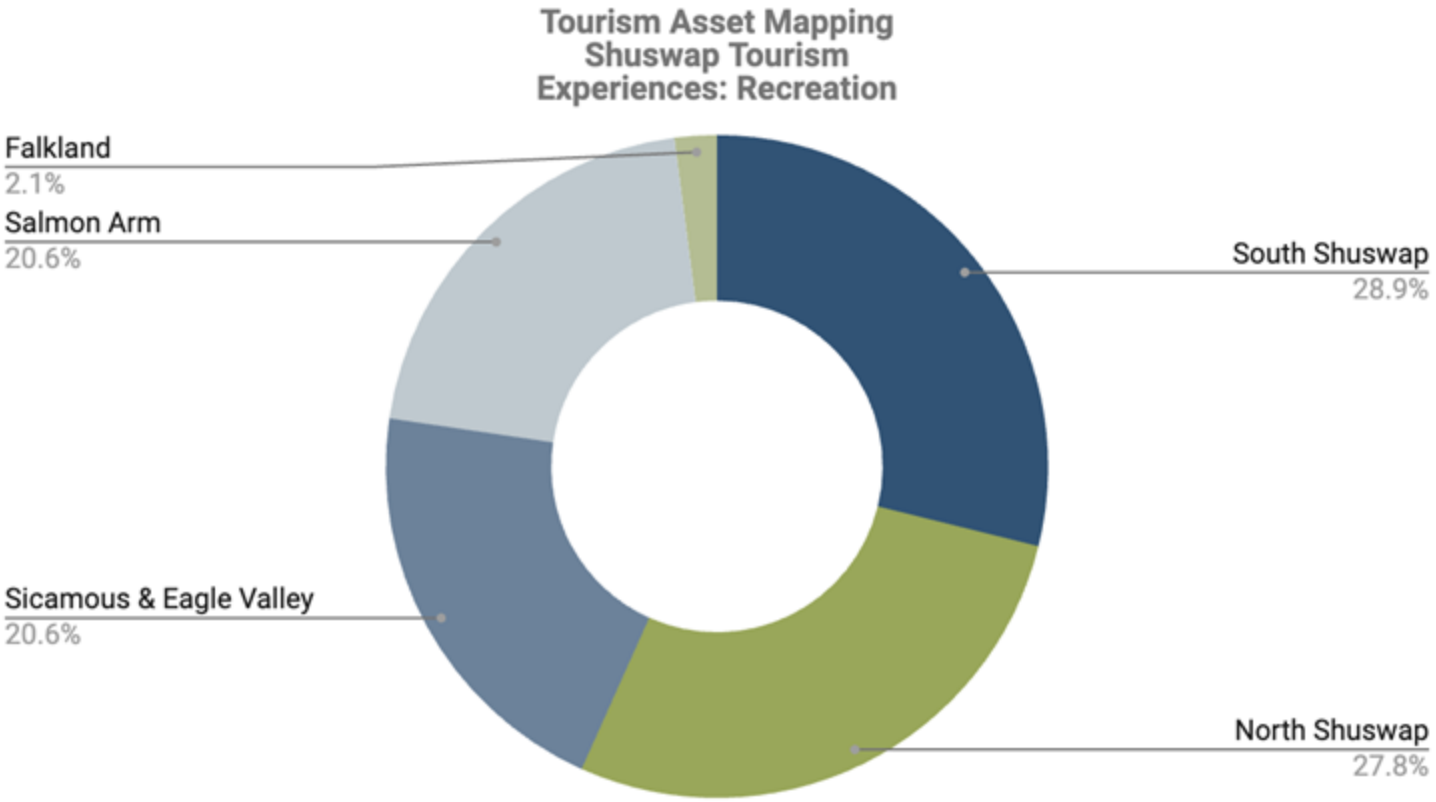
Region	Breweries	Cafes & Bakeries	Cideries	Distilleries	Farmers Market	Local Food & Farms	Pubs	Restaurants
Falkland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%
North Shuswap	0.0%	0.0%	0.0%	0.0%	50.0%	6.7%	0.0%	6.9%
Salmon Arm	33.3%	66.7%	100.0%	50.0%	50.0%	66.7%	40.0%	65.5%
Sicamous & Eagle Valley	0.0%	0.0%	0.0%	50.0%	0.0%	26.7%	40.0%	10.3%
South Shuswap	66.7%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	17.2%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What's the Story?

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.



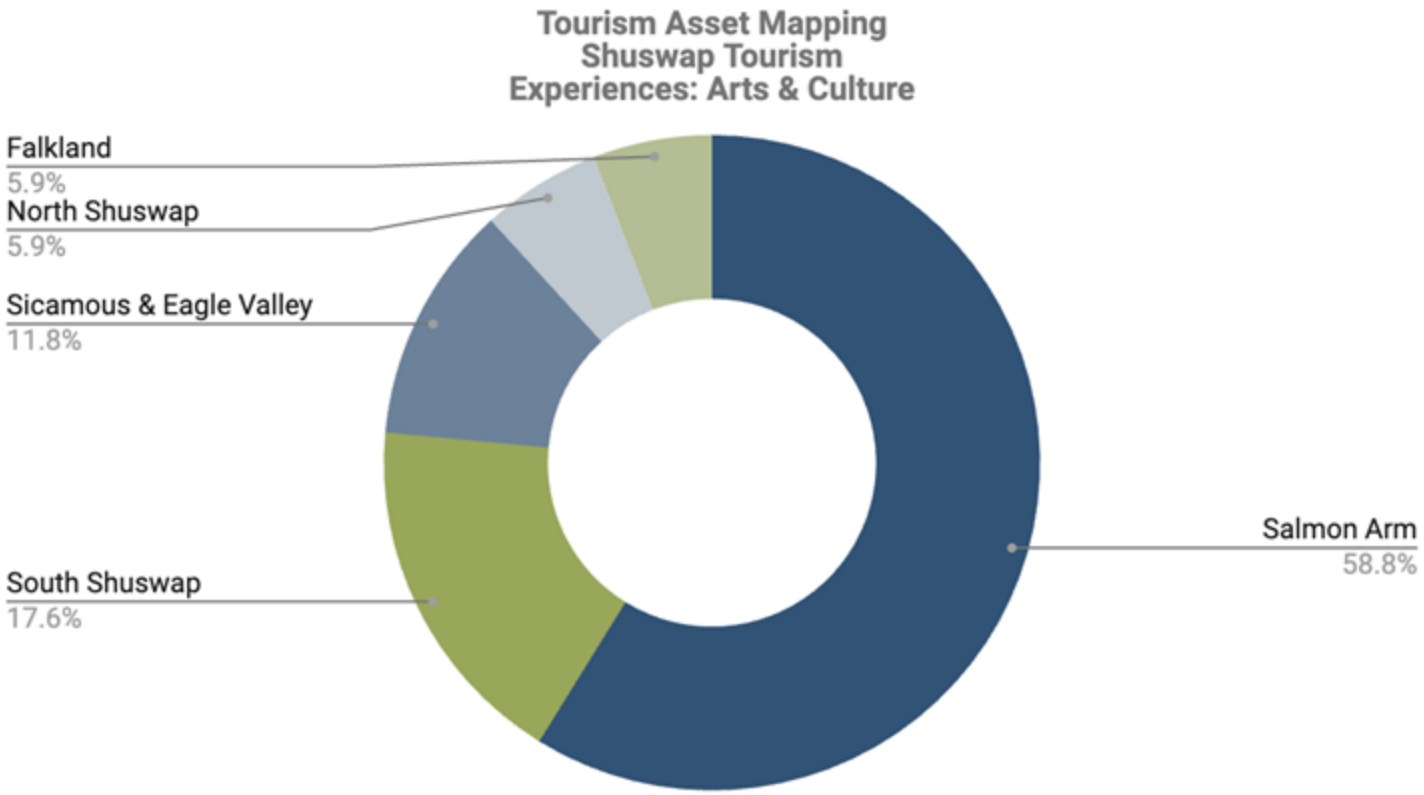
Region	Beach, Lakes & Rivers	Biking	Boat Launch	Boat Tours, Marina & Rentals	Fishing	Golf	Hiking	Horse-back Riding	House boats	Motor Touring	Paddle & Sup	Rafting
Falkland	3.6%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
North Shuswap	35.7%	0.0%	34.6%	31.3%	14.3%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%
Salmon Arm	14.3%	75.0%	11.5%	6.3%	42.9%	42.9%	100.0%	100.0%	0.0%	0.0%	50.0%	0.0%
Sicamous & Eagle Valley	14.3%	25.0%	15.4%	31.3%	14.3%	28.6%	0.0%	0.0%	100.0%	0.0%	0.0%	50.0%
South Shuswap	32.1%	0.0%	38.5%	31.3%	14.3%	14.3%	0.0%	0.0%	0.0%	100.0%	50.0%	0.0%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What's the Story?

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.



Region	Galleries & Artisans	Indigenous Experiences	Museums & Heritage
Falkland	0.0%	0.0%	16.7%
North Shuswap	9.1%	0.0%	0.0%
Salmon Arm	81.80%	0.0%	16.7%
Sicamous & Eagle Valley	0.0%	0.0%	33.3%
South Shuswap	9.1%	0.0%	33.3%
Grand Total	100.0%	100.0%	100.0%

Product Breadth and Depth.

Overview

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. Meanwhile, spending in these locally-owned businesses generate 2.5 times more benefits (taxes, income, jobs) than large outside-owned chains. Harvard Business Review published an exhaustive study of US cities proving that more small firms meant more jobs. In fact, a focus on locally owned businesses can eliminate poverty and increase per capita income.

Based on a broad set of experiences that actually drive visitation, an analysis of product breadth and depth was undertaken for both the summer and winter for the competitive sets below.

Competitive Set

- Vernon
- Revelstoke
- Golden
- Nelson

Product Breadth and Depth.

All Tourism Products

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

Products	Travel Driver*	Shuswap	Vernon	Revelstoke	Golden	Nelson
Axe Throwing	No					
Beach/Marina	Yes					
Boating/Sailing	No					
Bowling	No					
Catskiing	Yes					
Dog Sledding	No					
Escape Room	No					
Events	Yes					
Farm/Ranch/Zoo	No					
Fishing	Yes					
Fat Biking	Yes					
Galleries	No					
Golf	Yes					
Go-Karting	No					
Hang/Paragliding	Yes					
Heli Skiing	Yes					
Hiking Trails	Yes					
Horseback Riding	No					
Ice Skating	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					
Ski/Snowboarding	Yes					
Skydiving	Yes					
Sleigh Rides	No					
Snorkel/Scuba	Yes					
Snowmobiling	Yes					
Snowshoeing	No					
Spa/Wellness	Yes					
Theatres	No					
Waterpark	No					
Wildlife Watching	Yes					
Winery/Brewery	Yes					
Zipline	No					
TOTAL		**31.5**	**34**	**32**	**30.5**	**27**
INDEX		**100**	**108**	**102**	**97**	**86**

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

Product Breadth and Depth.

Key Findings

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

High-Value Destination Development and Marketing Opportunities

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.

Product Breadth and Depth.

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**

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 (i.e., anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

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

Product Breadth and Depth.

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 (i.e., anchor activity) as opposed to a non-driver that they would engage in on-site when visiting.*

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**

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**

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

Competitor Price-Performance Analysis.

Overview

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:

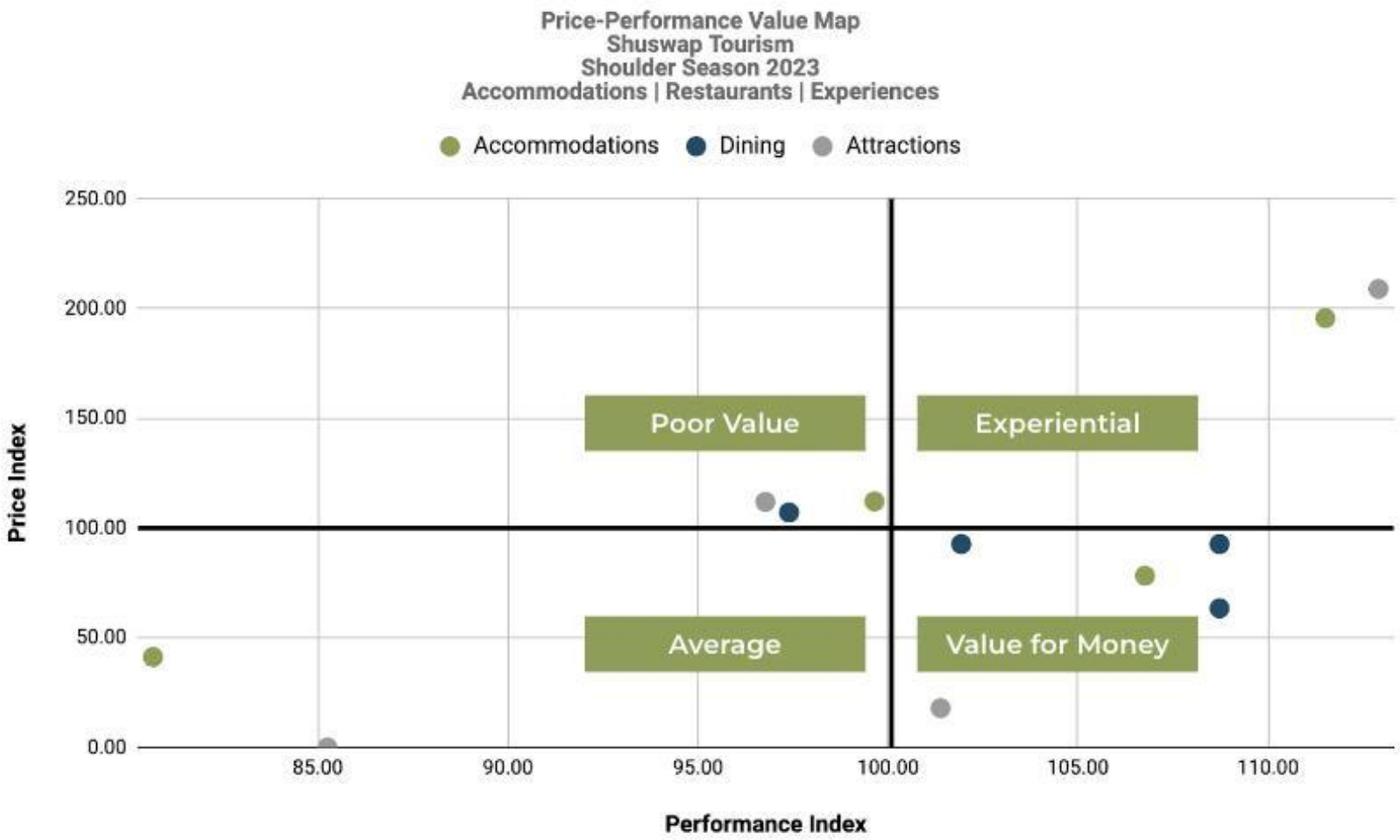
- Accommodations
- Restaurants
- Experiences

Price Performance Value Map.

What's the Story?

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.

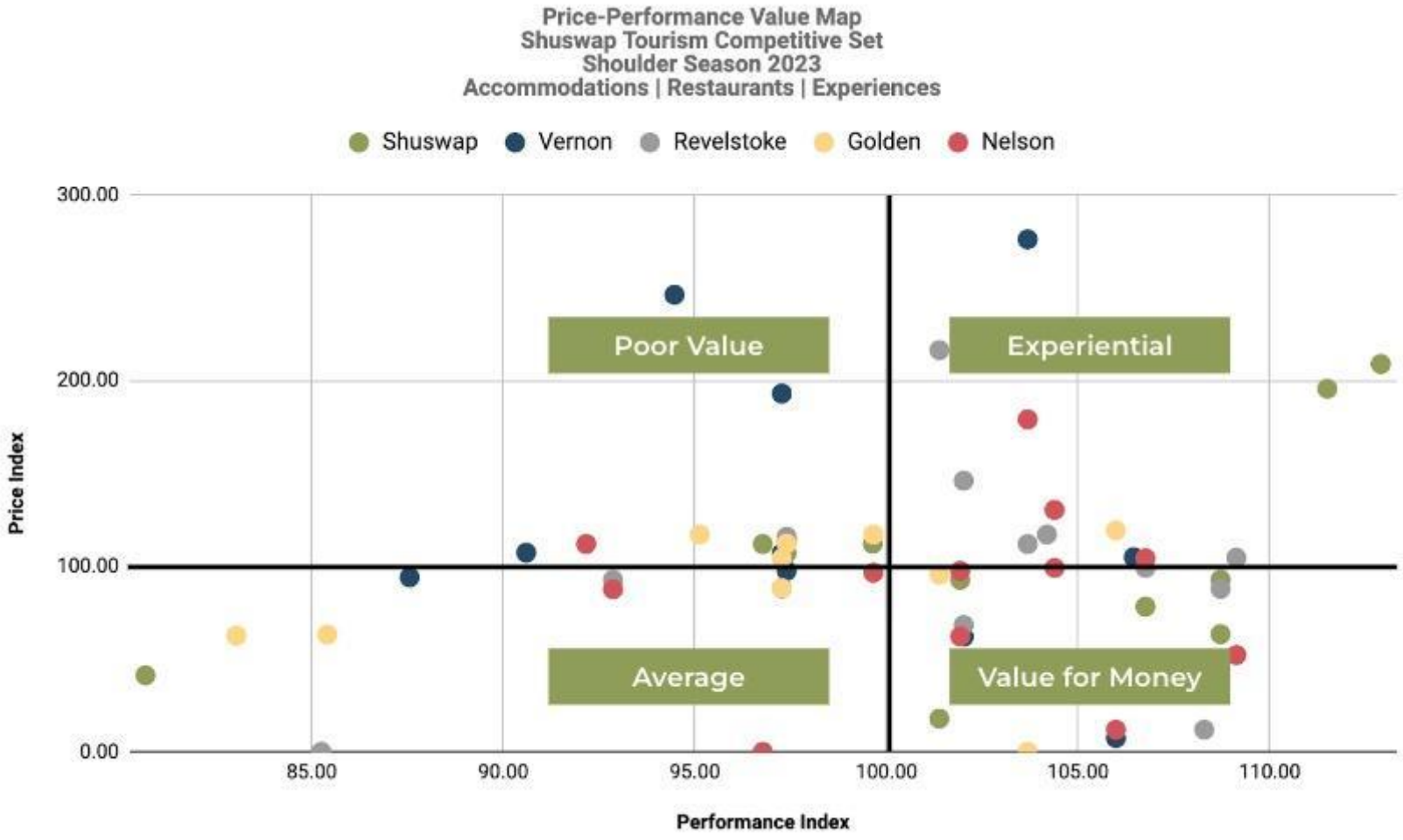


What's the Story?

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.



What's the Story?

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.

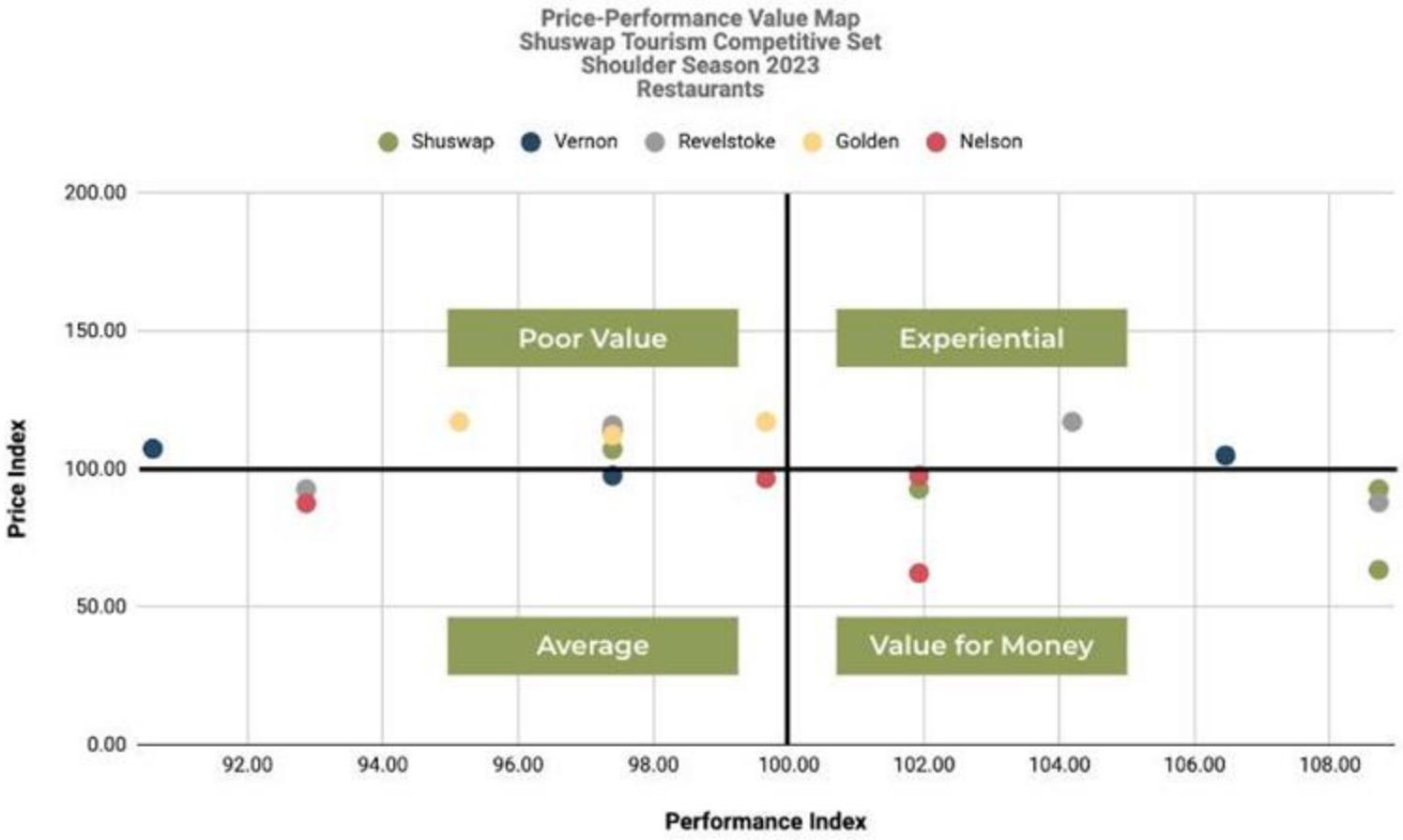
What's the Story?

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.

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

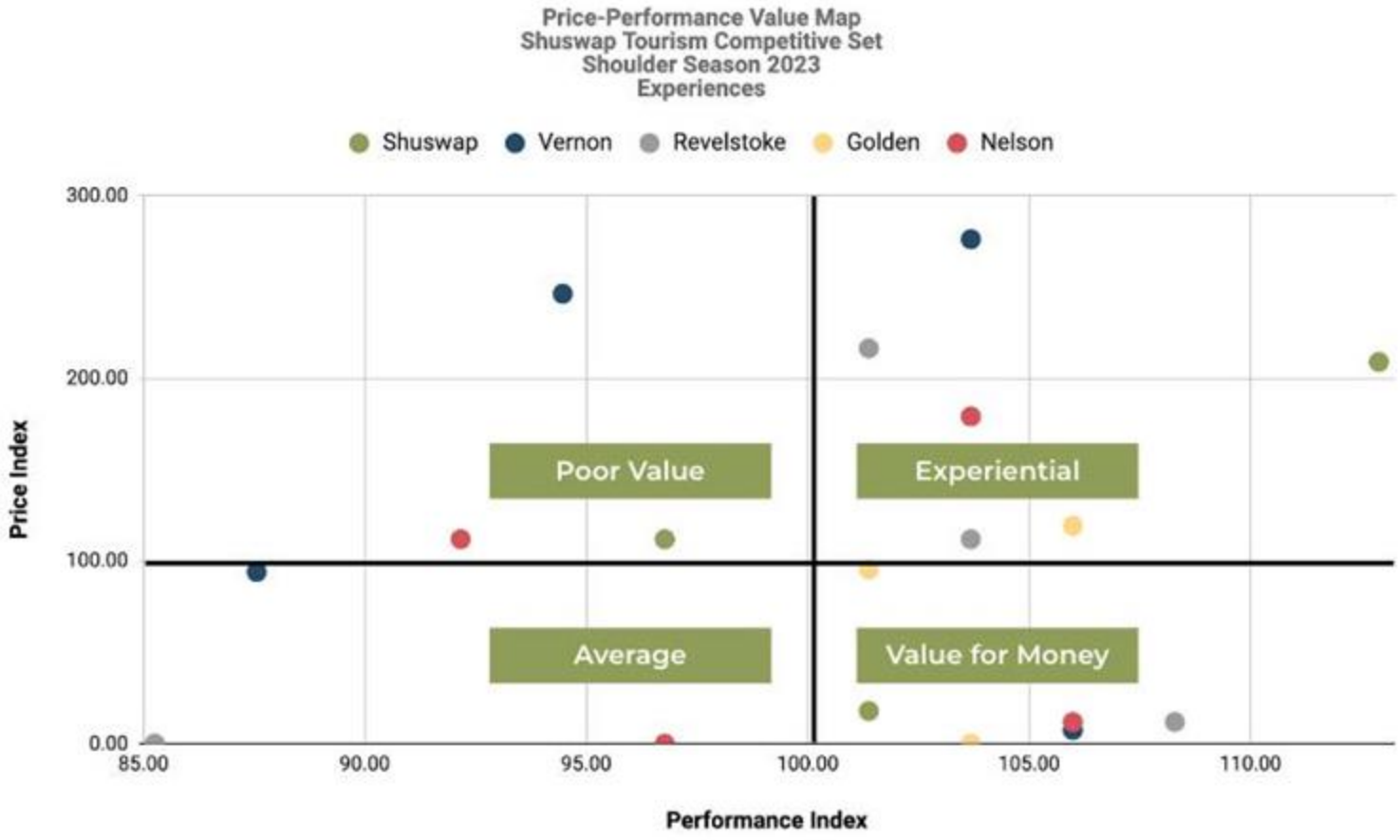


What's the Story?

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

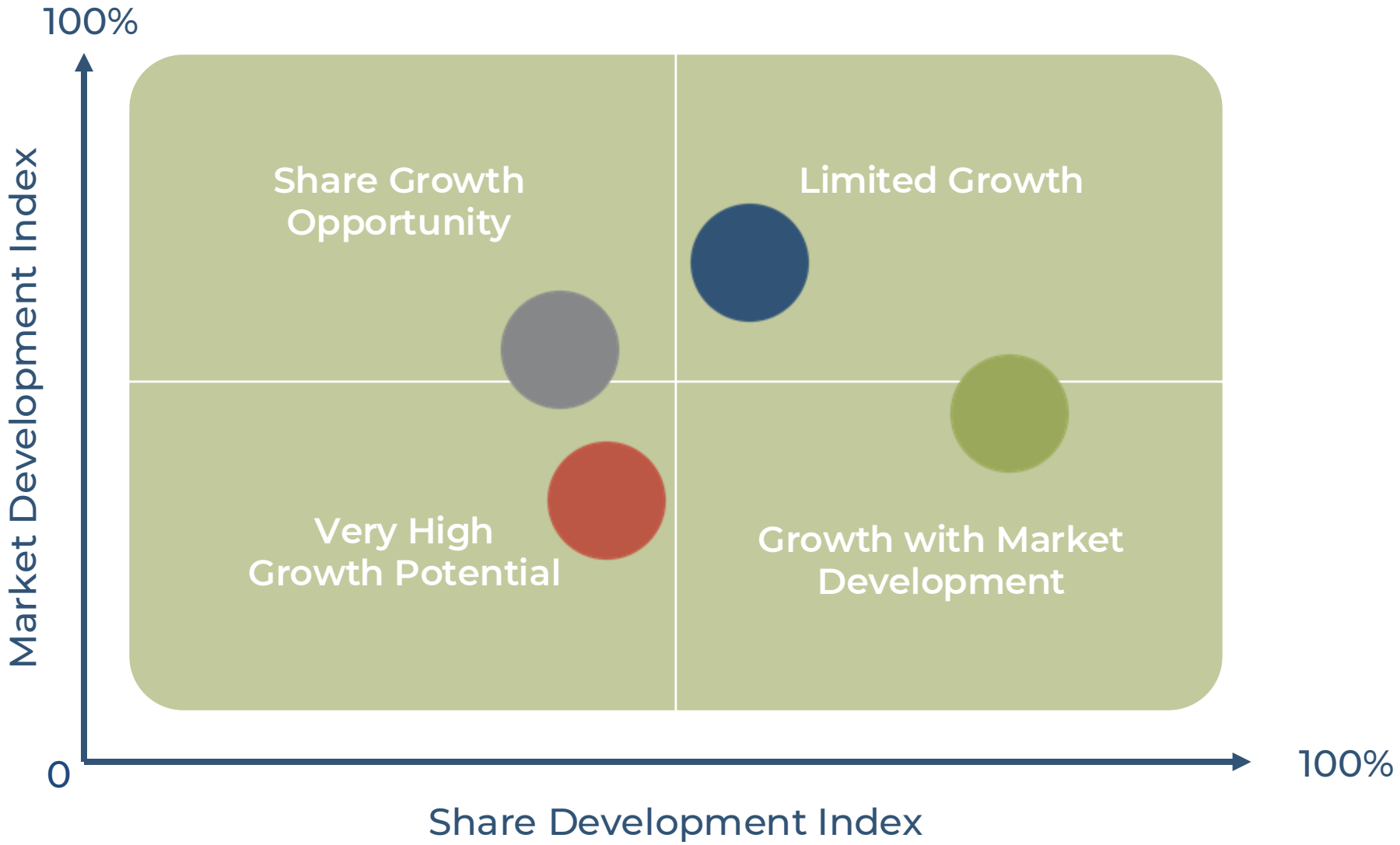
Similar to Vernon and Nelson, the Shuswap region's experiences compete in every value category. Notably, however, two Shuswap offerings fall low on the price index meaning that the region is likely missing out on potential revenue.



Destination Growth Analysis.

Appendix I

Managing Destination Growth Potential.



Shuswap Destination Growth Potential.

Managing Shuswap Growth Potential.

	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 Market Demand.

Shuswap 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

Shuswap 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 Market Potential.

Shuswap 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)

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.
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.

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 US market primary rider markets. US overnight visits to Shuswap between June and September estimated to account for roughly 75% of market or 73,148 overnight US 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.

Forces that Shape Market Growth.

Share Performance Metric

- **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

Customer Response Scale

Extremely	**5**
Very	
	4
Moderately	**3**
Slightly	

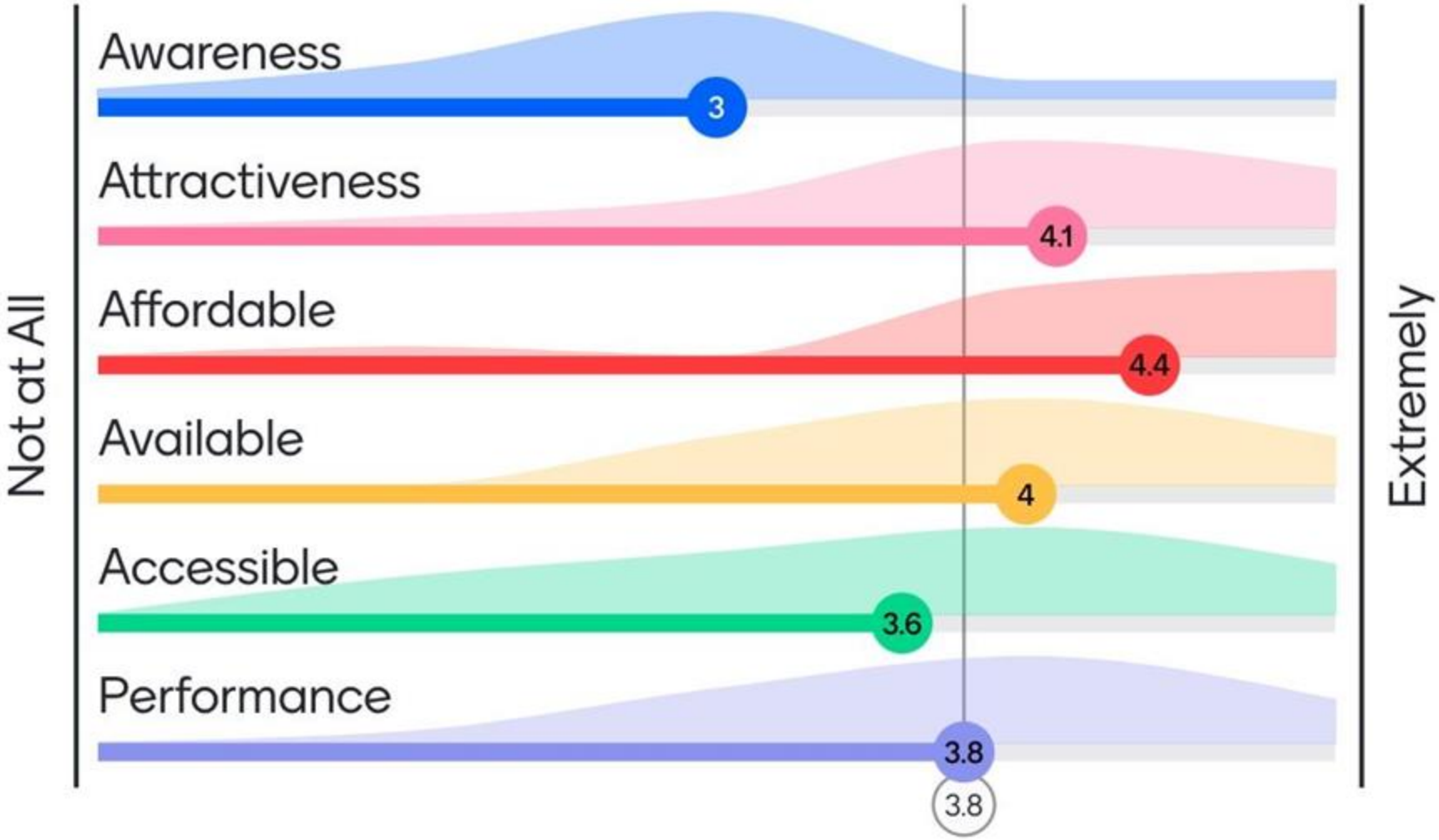
Current vs. Potential Market Share Index: Hiking.

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**			

Shuswap Region Insights: Hiking.

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.

Hiking.



Source: Shuswap Destination Brand Audit Workshop, 2023

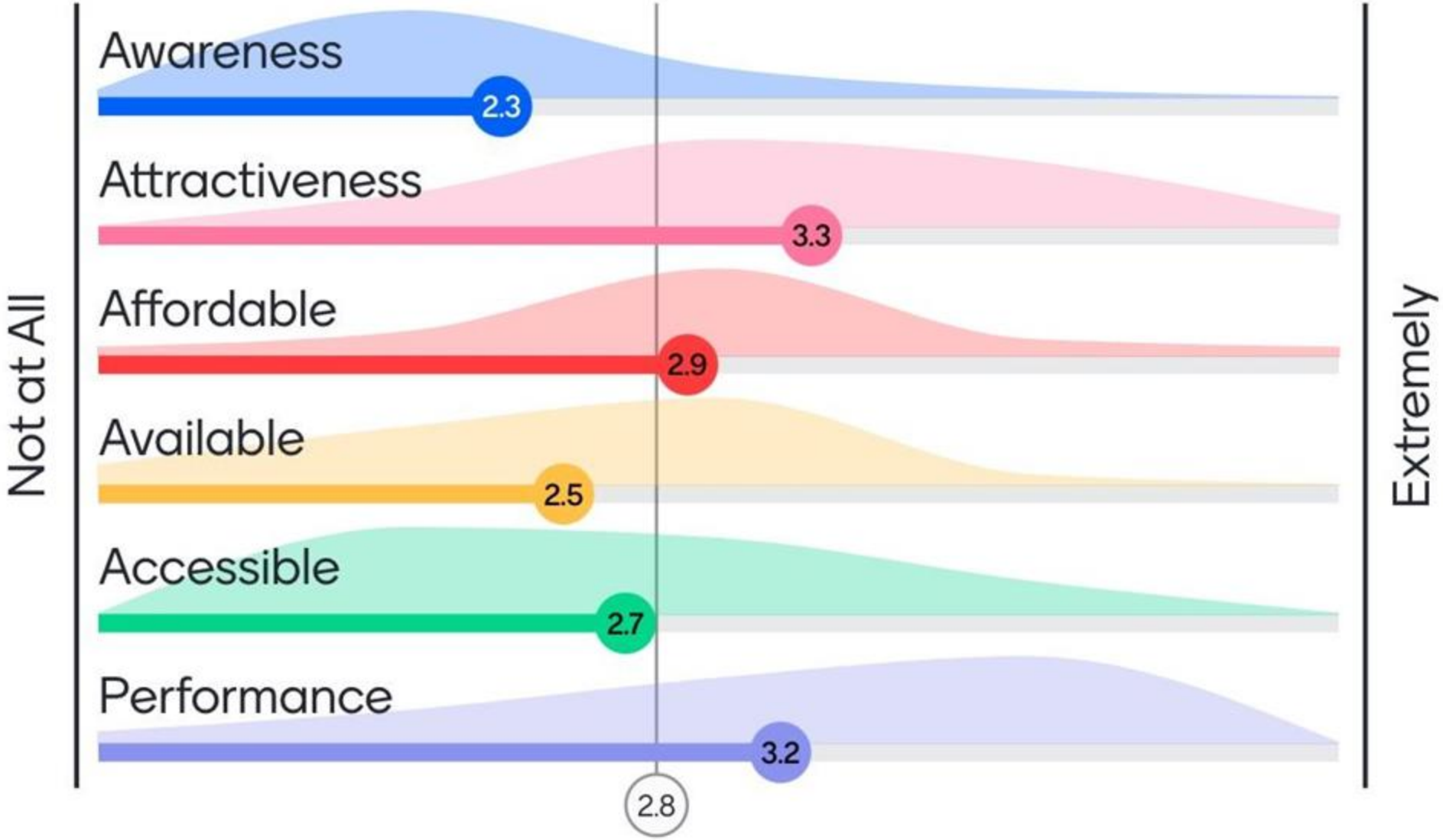
Current vs. Potential Market Share Index: Culinary.

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**			

Current vs. Potential Market Share Index: Culinary.

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.
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.

Culinary.



Source: Shuswap Destination Brand Audit Workshop, 2023

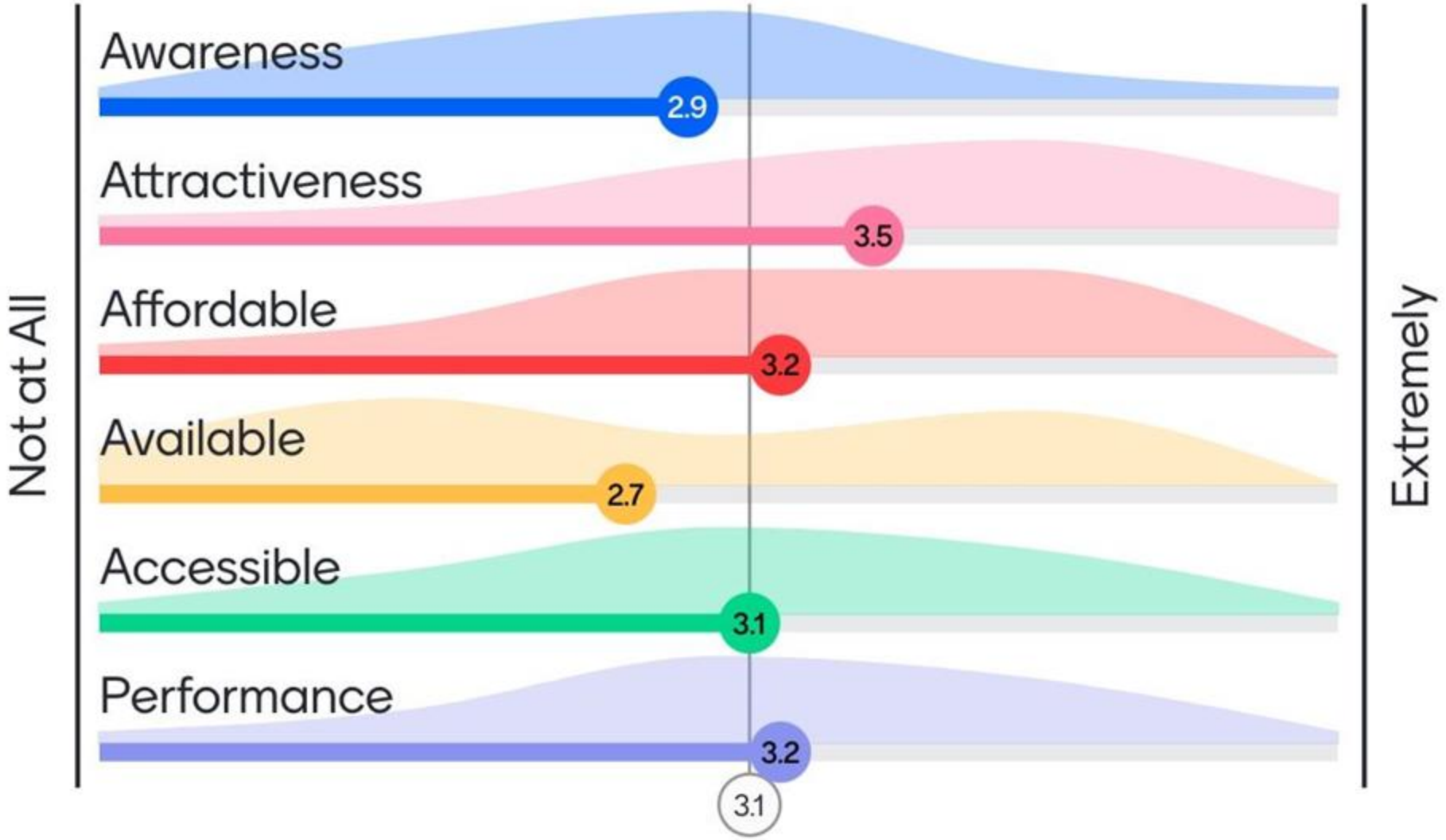
Current vs. Potential Market Share Index: Culture.

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**			

Current vs. Potential Market Share Index: Culture.

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.
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.

Culture.



Source: Shuswap Destination Brand Audit Workshop, 2023

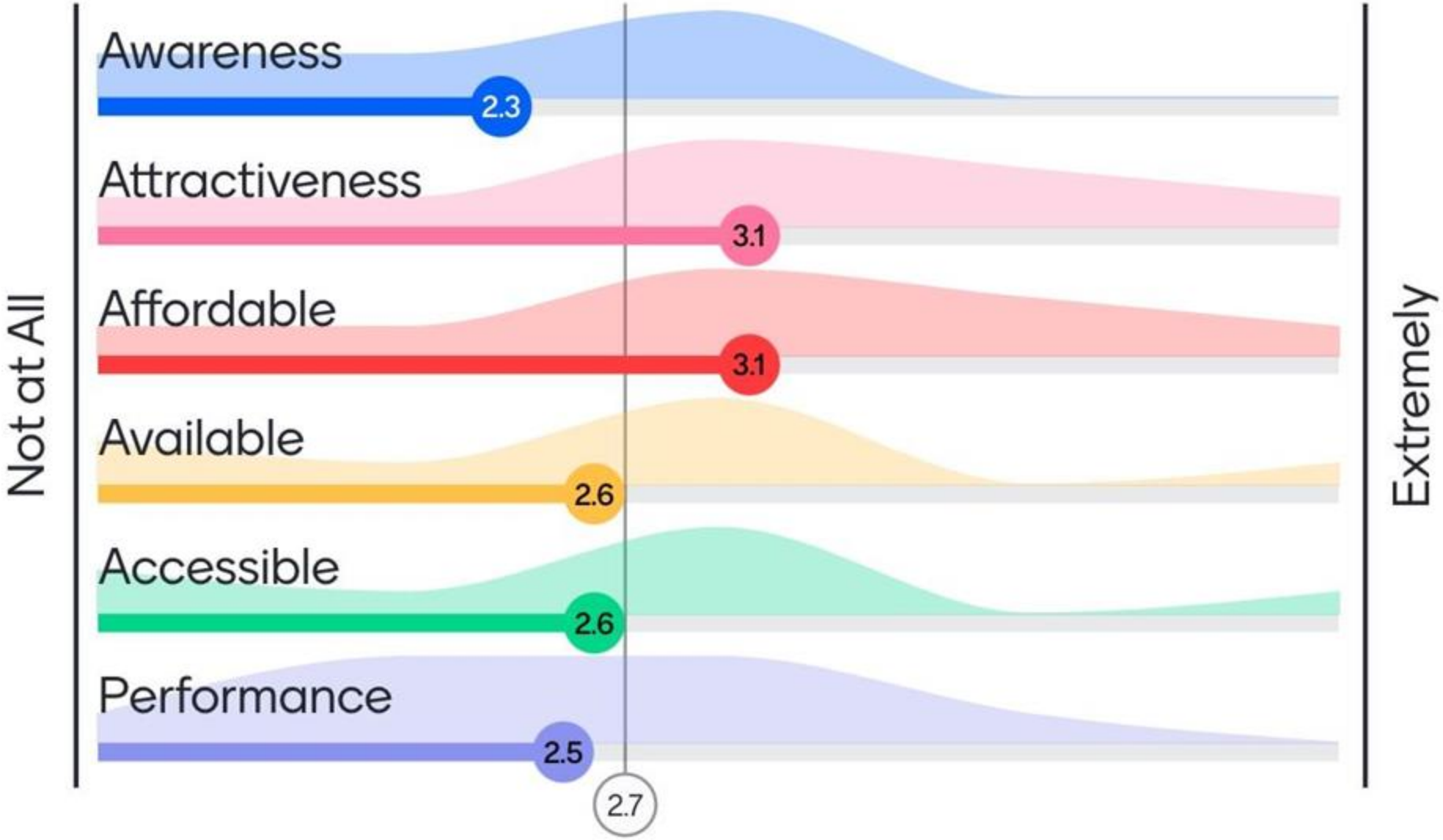
Current vs. Potential Market Share Index: Biking and Cycle Touring.

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	**63.1**			

Current vs. Potential Market Share Index: Biking and Cycle Touring.

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.
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.

Biking.



Source: Shuswap Destination Brand Audit Workshop, 2023

Current vs. Potential Market Share Index: Birding (Scenario).

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**			

Current vs. Potential Market Share Index: Birding.

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 specifies to watch for (see bcbirdtrail.ca).
Accessible		While still early in its development, Shuswap 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.

Current vs. Potential Market Share Index: Motorcycle Touring (Scenario).

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**			

Current vs. Potential Market Share Index: Motorcycle Touring.

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.
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

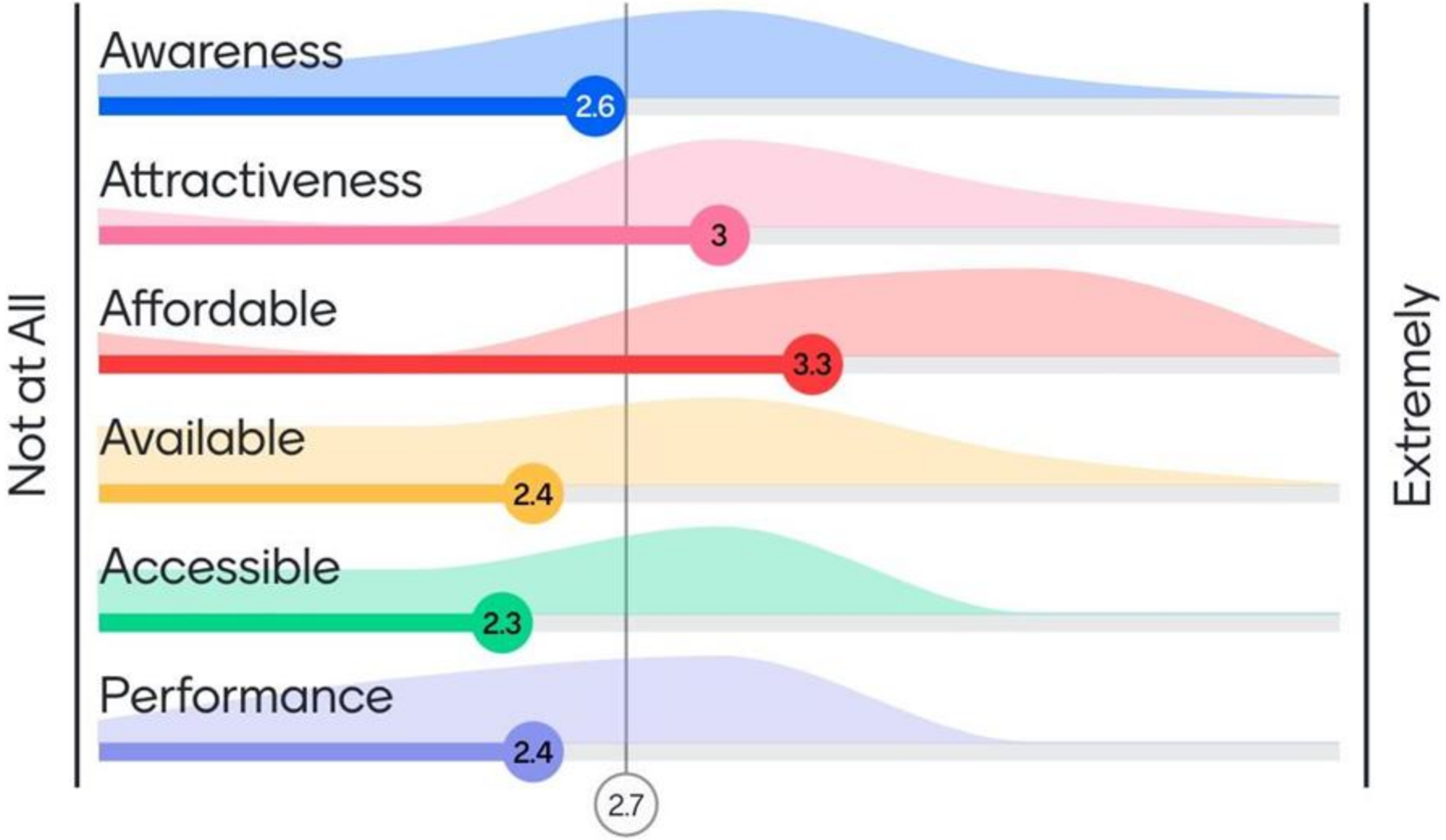
Current vs. Potential Market Share Index: Nordic and Snowshoeing.

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**			

Current vs. Potential Market Share Index: Nordic and Snowshoeing.

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 for Nordic skiing, light touring, ski touring and snowshoeing. Otherwise, there is limited land available in region that's free of conflicts with snowmobilers.
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).

Nordic and Snowshoeing.



Source: Shuswap Destination Brand Audit Workshop, 2023

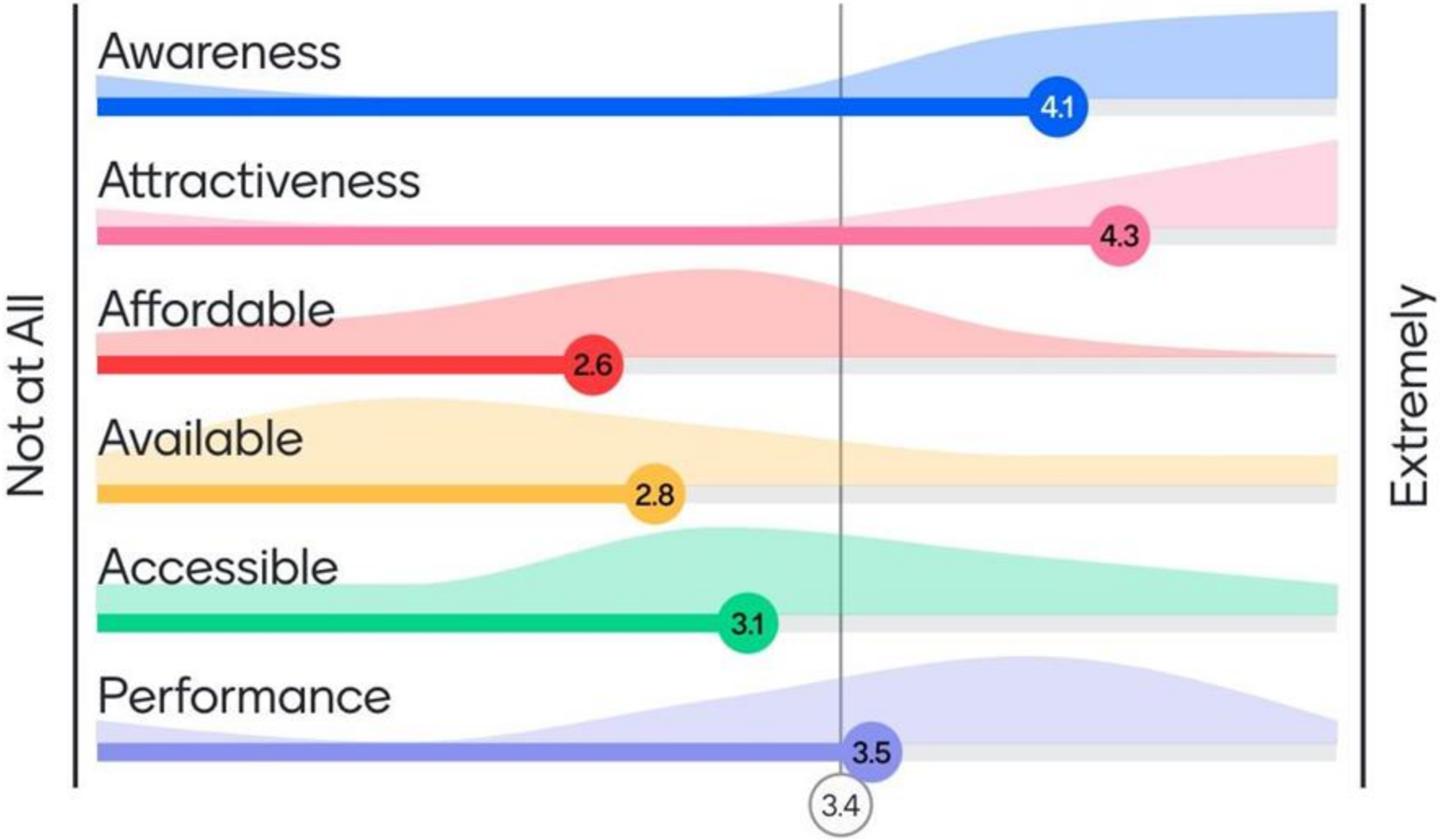
Current vs. Potential Market Share Index: Lakeside Lifestyle.

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**			

Current vs. Potential Market Share Index: Lakeside Lifestyle.

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 a 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).
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.

Lakeside Lifestyle.



Source: Shuswap Destination Brand Audit Workshop, 2023

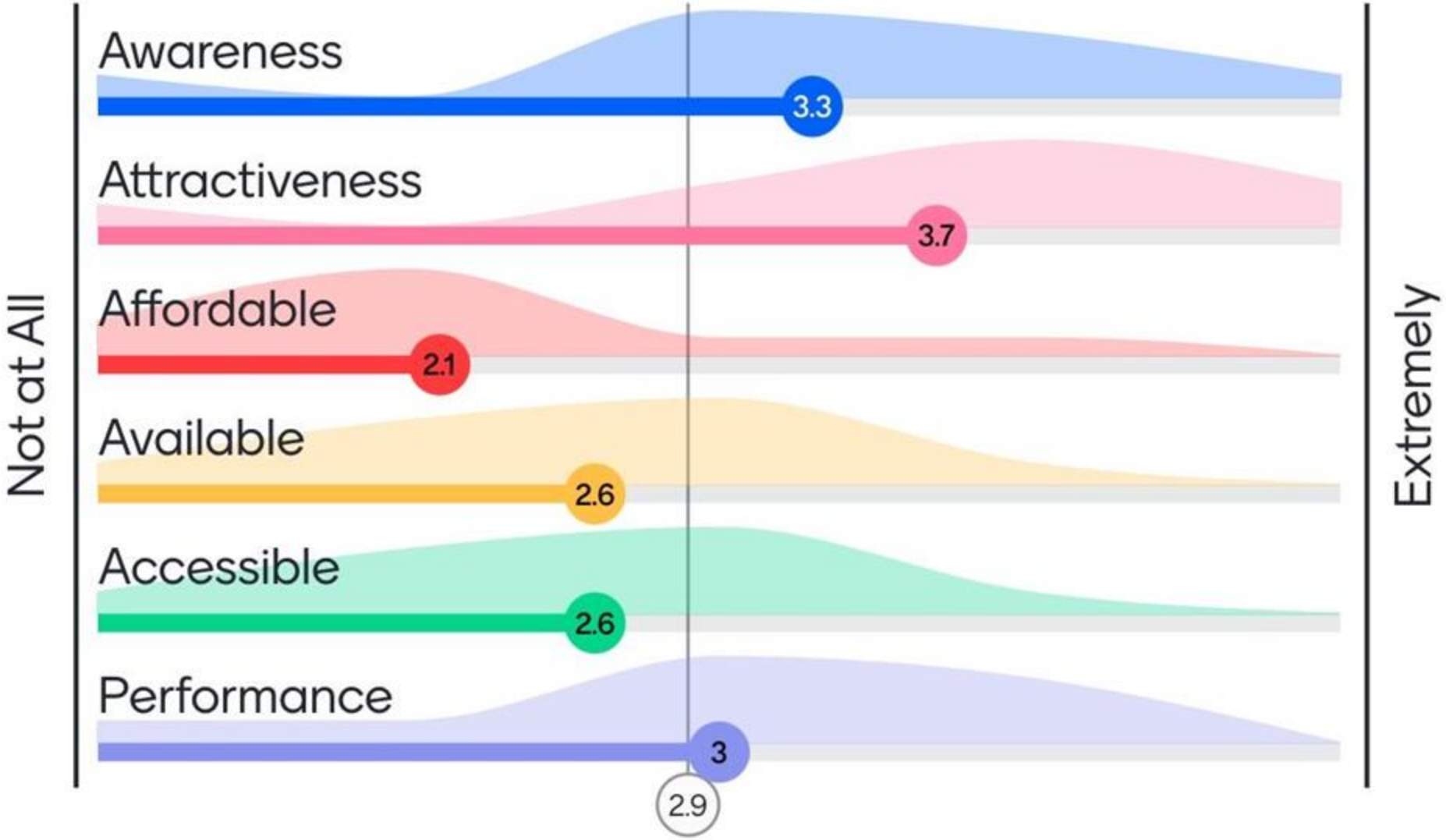
Current vs. Potential Market Share Index: Sledding.

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**			

Current vs. Potential Market Share Index: Sledding.

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.
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.

Sledding.



Source: Shuswap Destination Brand Audit Workshop, 2023

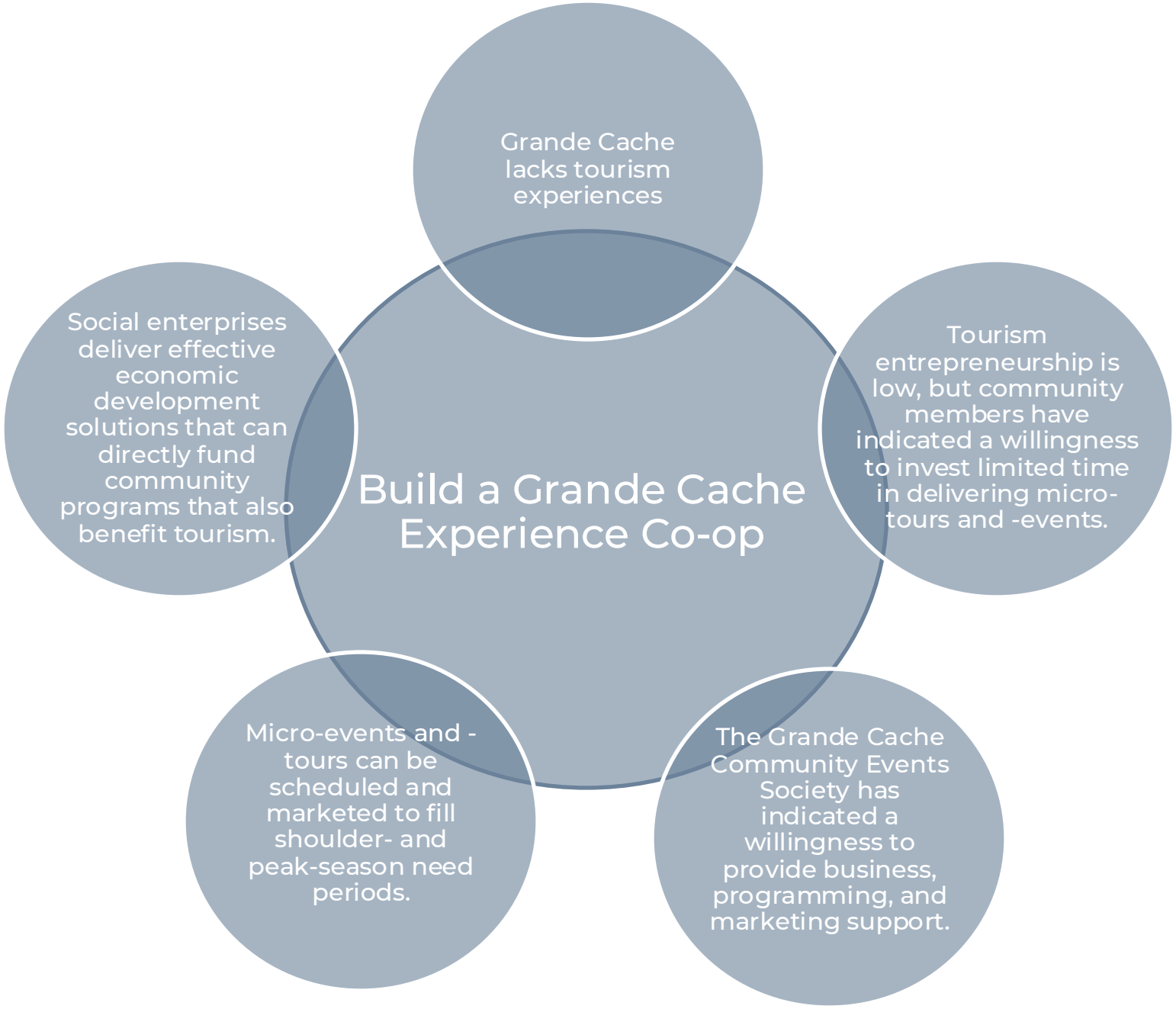
Case Study: Grande Cache Experience Co-op.

Appendix J

Case Study

Grande Cache Experience Co-op.

Strategic Insight.



The Grande Cache Experience Co-op

A Social Enterprise.

Grande Cache Experience Co-op.

While Grande Cache has much to offer in terms of scenic views, it does not offer much in the line of tourism experiences. Some community members themselves lamented the lack of tourism experiences.

While tourism entrepreneurship is low in the community, there exists volunteers and local “experts” who know the area, its history and culture, who have indicated a willingness to invest time into delivering micro-tours and events. Micro-events can also enhance community life and experience life and can be scheduled and marketed to fill peak and shoulder season need periods.

Grande Cache Community Events Society has indicated a willingness to provide business programming and marketing support. Community members have also suggested dark sky adventures (nighttime stargazing tours), Indigenous cultural tours and experiences, Indigenous healing, bird watching, history walks, micro-events, outdoor adventure days, hiking with a local, and more.

Until new businesses emerge, a social enterprise model could power the delivery of experiences and with targeted marketing support, help local hotels and restaurants fill important need periods.

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THE RIGHT HEIGHT FOR DESTINATION MANAGEMENT IN THE SHUSWAP REGION

Travel Local
new markets nearby