Tourism Experience Development in Alberta During the Coronavirus Pandemic

by

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Abstract

In an increasingly competitive global marketplace, the need for destinations to create compelling and memorable experiences to differentiate themselves and power economic growth has become an important destination development strategy following significant tourism industry disruption resulting from the Coronavirus pandemic. The purpose of this study was to explore key concepts in tourism experience development and gather knowledge on how tourism experiences, markets, and consumer behaviour have changed in Alberta, Canada because of the COVID-19 pandemic. Using exploratory qualitative methodology, this study involved semi-structured interviews with 15 tourism operators in Alberta to explore the evolution of tourism experiences as the province emerges from the pandemic.

The interview results found operators shifted their focus to domestic visitor markets during the pandemic, but following the pandemic international visitation is still lagging behind pre-pandemic levels and corporate markets have been slow to return. Tourism operators reported both pent-up demand for experiences as well as audiences who are still hesitant to travel and gather. Consumer buying habits have become more non-committal, trending towards last-minute purchasing and flexible buying options. Further to this, the tourism experience adaptations that occurred during the pandemic resulted from COVID-19 safety measures such as masking, hand sanitization, reducing capacities, and distancing guests. Technology accelerated as a driver of innovation and brought about improvements in visitor experiences, allowed businesses to reach more diverse and international audiences, and improved accessibility for some audiences. However, effective use of technology was challenging for some and there is a strong desire by tourism operators to go back to the way things were done pre-pandemic.

This was an important study not only to understand the experiences of tourism operators in Alberta but to bring forth timely considerations for the future of Alberta's tourism industry such as meeting consumers' diverse needs, bringing back skilled labour, building adaptive business strategies, and ensuring personalization is backed by data. The question overwhelmingly on tourism operators' minds is "what do people want from their experiences now?" As we enter an era of regrowth for Alberta's tourism industry, the time is ripe for the creation of impactful and engaging experiences that strengthen Alberta's tourism economy and inspire the world to visit Alberta. The question we must ask ourselves is how do we best support the industry in developing memorable Canadian experiences?

Keywords: experience development, adaptation, experience economy, Alberta, tourism, Coronavirus pandemic

Preface

This thesis is an original work by Krasna Kos completed under the supervision of Dr. Elizabeth Halpenny. The research project, of which this thesis is a part, received research ethics approval from the University of Alberta Research Ethics Board, Project Name "Tourism Experience Development in Alberta During the Coronavirus Pandemic", No. Pro00122141, 21/07/2022.

Table of Contents

List of Tables

List of Figures

Introduction

In an increasingly competitive global marketplace, the need for destinations to create compelling and memorable experiences to entice visitation has become more critical than ever following the unprecedented impact of the coronavirus pandemic (COVID-19) on the tourism industry. To improve destination development, destination marketing organizations and tourism providers are focusing on crafting stronger experiences and creating marketing messages that will appeal to the emotions and motivations of travellers as a way to fight for consumer attention, time, loyalty, and spending. As tourists have access to vast amounts of information and destination choice, they expect more from their experiences. As such, there has been a movement toward “experiential travel,” or experiences that are immersive, authentic, and memorable (Binkhorst & Dekker, 2009). Many consumers also want personal and customized experiences, and seek a balance between control by the experience stager and self-determined activities with spontaneity, freedom, and self-expression (Binkhorst & Dekker, 2009). These shifts in consumer behaviour are important for destination managers and tourism operators to understand, thus, extensive research in tourism experience development has been conducted to study how elements of motivation, memory, meaning, emotion, and engagement satisfy psychological consumer needs and sway tourists’ decision-making and behavior (Ketter, 2018).

Pine and Gilmore’s (1998) foundational work on the “experience economy” has been some of the most influential in experience research across many industries, tourism notwithstanding. They defined experiences as meaningful, impactful, intangible, and inherently personal, with no two people having the same experience even at the same place and time (Pine & Gilmore, 1999). According to Pine and Gilmore (1999), the economy has progressed from commodities to goods to services, and now to experiences, as consumers place more value on experiences over material goods and are willing to pay a premium for immersive, engaging experiences (Pine & Gilmore, 1998). The experience economy introduced a new way of thinking about consumer experience where robust experiences were lauded as the best way to form strong customer connections and compete for the time, money, and attention of consumers. As tourism is an inherently experiential industry, experiences are the key to competitive differentiation and a major area of focus and growth for many destination management organizations seeking to elevate the customer experience more intentionally and improve the destination experience based on changing consumer expectations. A shift to experience-based thinking in tourism has brought about a focus on delivering authentic and memorable experiences, creating emotional connections with travellers, and transforming tourism products into experiences (Travel Alberta, 2020).

The coronavirus pandemic started to engulf the globe in 2019 and has been the most significant disruptor to global travel and tourism in the history of the industry (Destination Canada, 2021a). Businesses all over the world witnessed plunging demand, supply chain disruptions, border closures, grounded flights, meeting and event cancellations, mandated social distancing, and work-from-home orders (Kaur & Kaur, 2020). Many sectors of the global economy have been devastated, particularly those rooted in the experience industry such as hospitality, sports, meetings and events, and tourism (Pine, 2020). With nearly three years of COVID-19 behind us (at the time of writing), travel restrictions have begun to lift and global economies to reopen; the tourism industry is starting to rebuild after suffering deep financial, employment, and visitation losses. However, the pandemic has had a profound impact on travel preferences, creating a permanent change in industry economics, changing expectations and opportunities, and shaping unequal market and industry recovery (Destination Canada, 2021a).

Many of the long-term effects of COVID-19 are still emerging and the key to recovery will be through developing an understanding of changes in the industry and in consumer behaviour so destinations can strategically adjust areas of focus, mitigate future risk and capitalize on market opportunities (Destination Canada, 2021a).

Considering these impacts on tourism experiences and consumer behaviour, there is a need to understand what the experience economy looks like now as the tourism industry emerges from the pandemic. Pine and Gilmore (2019) argue that experiences are not a luxury but a necessity, thus, consumers crave experiences in all situations. In their updated edition of *The Experience Economy*, they make the case that experiences are critical and achievable in any environment (Pine & Gilmore, 2019). Even during the COVID-19 lockdowns, people did not give up their experiences, they simply shifted them from public to familial, from international to local, from outside the home to inside the home, and from physical to digital (Pine, 2020). Some of the tourism businesses that survived the pandemic pivoted their business strategies to create virtual experiences, engaged their customers through social media, focused on domestic markets, offered outdoor experiences, and emphasized health, safety, and hygiene as part of their experiences. The need for connection and engaging experiences only strengthened during the pandemic (Kaur & Kaur, 2020). After more than two years of pent-up demand, consumers are hungry for travel experiences once again to make up for lost time; and not just any experiences will do (Jorden, 2022). As consumers are increasingly seeking meaningful, immersive, novel, and purposeful experiences, a shift in consumer travel behaviour has been reported where passions, hobbies, and novel experiences are being prioritized instead of specific countries when making visitation decisions (Jorden, 2022; Sparkloft Media, 2022). Moreover, after a significant period of disruption, the global tourism marketplace may be even more aggressive than before the pandemic and competition for tourist dollars will be fierce as countries seek to attract visitors to power economic growth and recapture lost market share (Destination Canada, 2021b). It is imperative that businesses and destinations use the lessons learned during the pandemic, not only to build a more agile and future-ready tourism industry but also to stand out and grab consumer attention in a changing experience economy.

Purpose of Study

The purpose of this study was to explore key concepts in tourism experience development and gather knowledge on how tourism experience provision has changed in Alberta before, during, and after the COVID-19 pandemic. Although the literature on experience design and development is broad-ranging, five overarching experience development concepts have been chosen to inform this research: experience economy, co-creation, memorable tourism experiences, extraordinary experiences, and experiential marketing. Despite much academic attention in the areas of motivation, meaning, and experiences in tourism literature, more research is needed on how to apply and operationalize experience economy concepts (Ketter, 2018). As such, employing a temporal frame of before COVID-19, during COVID-19, and post-COVID-19, this research documents how Alberta tourism operators have designed and delivered experiences. Although the threat of COVID-19 still loomed during this study, the period of time when the interviews were conducted (July - August 2022) was referred to as post-COVID-19 for the purposes of this paper. Through enhancing their knowledge of experience development, tourism providers are better positioned to respond to market demand and create experiences that attract more visitors, generate more revenue, and strengthen both the business and destination brand. The need for understanding and adapting experiences has never been more pressing as the tourism industry seeks to adapt to changing consumer preferences and rebuild from the COVID-19 pandemic.

Research Questions

The following three research questions guided this study:

1. How have tourism experiences evolved in Alberta from pre-pandemic times to now?
2. How has tourism consumer behaviour changed and what do visitors want from their experiences now?
3. How have target markets changed for Albertan tourism providers and how have experiences been adapted to serve these changing markets?

Scope and Data

Canada has deemed tourism experience development to be a valuable visitor attraction and destination development strategy. The country's leading marketing and research organization, Destination Canada (Destination Canada, 2021b), aims to increase the quality and quantity of competitive travel experiences by partnering with provincial destination marketing and management organizations to support the experience development process through experiential training programs such as Travel Alberta's SHiFT program, Tourism Nova Scotia's EXCELLerator program, Tourism Saskatchewan's Achieving AWEsome program, and Destination BC's Remarkable Experiences program. Export-ready tourism experiences are eligible to apply to Destination Canada's Canadian Signature Experiences list, a collection of once-in-a-lifetime travel experiences found only in Canada that are marketed to lucrative international markets (Destination Canada, n.d.).

As this thesis specifically focuses on tourism operators and tourism experience development in Alberta, Canada, data for this study was collected via interviews conducted with

Alberta tourism operators. The interviews were transcribed and coded to identify themes and patterns within the qualitative data. The results from this study provide insight into how tourism experiences, consumer preferences, and target markets have evolved in Alberta as a result of the COVID-19 pandemic.

Literature Review

Research on experience development concepts is broad ranging encompassing several social and psychological concepts such as meaning, values, memory, consumer behaviour, emotion, and psychological needs. This study has chosen five overarching experience development concepts to review to develop knowledge on tourism experience development: experience economy, co-creation, memorable tourism experiences, extraordinary experiences, and experiential marketing. These concepts have also been incorporated into the interview questions. The literature review examines how the tourism industry has adapted tourism experiences during the COVID-19 pandemic and the trends that have emerged as a comparison to the experience adaptations and strategies that occurred in Alberta.

Experiences and the Experience Economy

Experiences have emerged as a central construct in psychological research from the foundational work of Csikszentmihalyi's (1975) concept of flow and optimal experiences, and Maslow's (1964) peak experiences resulting from happiness and fulfillment often achieved through nature experiences, aesthetic perception, creative activities, intellectual insight, holistic experiences, and athletic pursuits (as cited in Bastiaansen, 2019). Although experiences have long been fundamental components of tourism, the concept of an experience is subjective, complex, and difficult to define. Mannell and Iso-Ahola (1987) have noted in early tourism literature that the experience itself is the most elusive area in tourism and a greater understanding of tourism experience development is needed. Pine and Gilmore (1998) view experiences, and transformation resulting from experiences, as the final phases of economic progression, evolving through the lower stages of commodities, goods, and services economies (Pine & Gilmore, 1998). While the goods and services economies are based on features and benefits, the experience economy highlights intangible aspects such as emotions and interactions through consumption of an experience (Pine & Gilmore, 1999). These intangible aspects and emotional experiences are inherently personal as they exist in the mind of the engaged individual (Pine & Gilmore, 1998). Pine and Gilmore (2019) distinguish experiences from services through the key characteristic of *time*. Services are delivered on demand and are about time well saved, while experiences are revealed over a duration of time and are about time well spent (Pine & Gilmore, 2019). As consumers are willing to pay more for a high-value experience than for a service or good, experience staging is the key to competitive differentiation (Pine & Gilmore, 1999).

The challenge, however, is designing not just any ordinary experience, but an engaging, compelling experience that commands a higher price. According to Pine and Gilmore (1999), a memorable experience occurs when a business intentionally uses services as the stage and goods as props to engage customers in a personal way, delivering an experience that is highly differentiated, distinctive, memorable, and customized. Thus, in the experience economy, the attention shifts away from product or service delivery to the customer's experience as the value-added element (Pine & Gilmore, 1999). Pine and Gilmore (1999) emphasize that expertly staged experiences should engage consumers through active versus passive participation and immersion (becoming part of the experience) versus absorption (merely occupying a person's attention). They recommend that all experiences should have elements of four dimensions: education (develop new knowledge and skills), escapism (allows for immersion in the experience), aesthetics (looks inviting and engaging), and entertainment (delivers an experience that is fun and enjoyable). Pine and Gilmore (1998) note that the richest experiences will have elements of all four dimensions; the "sweet spot" is the intersection where these dimensions meet. It is when customers perceive that they feel, learn, and become immersed, that all the senses become involved and the experience feels meaningful or extraordinary (Pine & Gilmore, 1999).

As it is becoming increasingly imperative for businesses in a competitive tourism industry to create engaging and memorable experiences, Pine and Gilmore (1999) suggest five key design principles for operationalizing and developing memorable experiences:

1. Theme the experience to create a storyline that captivates the customer
2. Incorporate impressions and takeaways of the experience that fulfill the theme
3. Eliminate negative cues that contradict or detract from the theme as every interaction will influence a customer's perception
4. Mix in memorabilia that represent the experience to extend the impact of the experience, add personal connection to the experience, and generate more revenue
5. Engage all five senses to enhance memorability

As Pine and Gilmore (1999) advocated, incorporating experiential elements into a tourism experience can increase the value, generate demand, and create the potential for a business to charge a higher price and attract a higher yield consumer market. These factors will differentiate and define businesses that will succeed in the experience economy. In addition to competitive business advantage, experiences can be layered onto a company's existing offerings, thereby contributing a new revenue stream (Pine & Gilmore, 1999).

From a consumer perspective, an "experience" better connects to the hearts and minds of travellers rather than being sold a product (Pine & Gilmore, 1999). The more customized and personally engaging an experience becomes, the more value it will provide the consumer by serving that individual's needs uniquely and enhancing their satisfaction with the experience (Pine & Gilmore, 1999). Modern consumers are digitally connected to a wealth of information increasing their knowledge of and exposure to events and experiences globally. This in turn increases the expectations of what an engaging experience could and should look like. Many of today's consumers are also time-poor and want to spend their limited leisure time in the most memorable and enjoyable way possible. As such, travellers seek to engage with the people and places they visit, connect with locals, get off the beaten track, engage the senses, slow down, and dive into the local culture (Arsenault & Anderson, 2019). Consumers are searching for unique, memorable, and authentic experiences that reflect their own personal stories and enrich their lives (Binkhorst & Dekker, 2019; Ketter, 2018). Buying experiences also makes people happier and gives them a greater sense of well-being rather than buying goods (Pine & Gilmore, 1999).

Co-creation

As businesses fight for consumer attention in a competitive tourism industry and customers become increasingly discerning regarding their experiences, "experiential" has evolved from a buzzword to an expectation for travellers. Many companies still innovate from a product-centric point of view, however, there is a movement away from solely looking at consumer product use and buying behaviour towards strategizing based on consumer needs, motivations, and values (Binkhorst & Dekker, 2009). Some scholars have claimed that this shift from service-based to experience-based economies has come about as a result of societal changes in social values, such as dematerialization, and consumers' desire to have more involvement in the creation of their experiences (Binkhorst & Dekker, 2009; Mehmetoglu & Engen, 2011). Thus, the driving force behind the experience economy can partly be attributed to an individual's need to create their own identity and to shape their personality in a life characterized by increased freedom and improved economy (Mehmetoglu & Engen, 2011). Consumers are searching for psychological needs fulfillment such as inspiration, authenticity, belonging, value, and meaning (Binkhorst & Dekker, 2009), and the right types of experiences can fulfill these needs. But how do experience providers know what their customers want? Prahalad & Ramaswamy (2004) have suggested that businesses should enter into a dialogue with their customers through co-creation.

Co-creation is the process through which customers interact with a business to generate their own meaningful experience which adds specific value for the individual consumer, particularly towards the personal, social, and cultural values that the individual holds (Binkhorst & Dekker, 2009; Prahalad & Ramaswamy, 2004). In this approach to experience development, consumers participate in the innovation process instead of passively responding. Managers facilitate the experience so they can co-shape consumer expectations and experiences, but the individual is empowered to personalize the experience (Prahalad & Ramaswamy, 2004). Co-creation is not a customization of products and services or a staging of events around the business's offerings (Prahalad & Ramaswamy, 2004). It is about the joint creation of value reflective of how the individual chooses to interact with the experience environment that the company facilitates (Prahalad & Ramaswamy, 2004). Campos et al. (2016) consider active participation and interaction during the on-site experience to be the two key dimensions of co-creation. Active participation generates interest and contributes to the creation of meaning derived from the experience and social interactions allow individuals to experience belonging and community (Campos et al., 2016).

Co-creation has been regarded as the future of innovation by some researchers as it allows customers to gain more control in creating unique experiences that reflect their personal stories and interests rather than the top-down approach traditionally seen in businesses (Binkhorst & Dekker, 2009). Research in tourism co-creation has suggested that it is an important strategy for creativity, involvement, and overcoming commodification as it allows for authentic and meaningful experiences to be created that are personal and subjective to that individual (Binkhorst & Dekker, 2009). Typically, tourists are rarely included as partners in the process of designing the tourism experience beforehand, but rather asked to report about it during the experience, or evaluate it afterward. Being sensitive to the wishes and needs of consumers is also a step to becoming a more customer-centric organization and potentially identifying niche markets to target. Co-creation also moves away from “sage on a stage” events where customers are talked at, to allowing customers to discover and learn for themselves (Arsenault & Anderson, 2019). This interactivity helps to focus attention on the experience leading to higher levels of memorability (Campos et al., 2016). Customers will have a greater sense of ownership of the experience and will become advocates for the experience (Arsenault & Anderson, 2019).

From an experience producer perspective, co-creation is beneficial because product and experience development is informed by the consumer and caters to their personal attitudes, social values, and motivations. Prahalad and Ramaswamy (2003) suggest that a new source of value creation for businesses will come from these personalized interactions. Binkhorst and Dekker (2009) extend this approach by suggesting that co-creation will also contribute to the uniqueness and authenticity of the destination itself by moving away from marketing based solely on destination attributes as globalization and the convergence of technologies are making it harder to differentiate experience offerings (Prahalad & Ramaswamy, 2004). Furthermore, if consumers do not see any differentiation in the experience offering, they will buy based on price alone (Pine & Gilmore, 1999). This isn't a sustainable option for many local tourism businesses which run on tight profit margins.

Memorable Tourism Experiences

The delivery of memorable experiences is central to the experience economy and has catalyzed a rich body of research studying the memorability of experiences and how memorability might be measured (Schmitt et al., 2009; Kim et al., 2012). A memorable tourism experience (MTE) has been defined as a tourism experience that is positively remembered and recalled after the event has occurred (Kim et al., 2012). However, as experiences are personal, subjective, and influenced by the mental state of the engaged individual, so too are MTEs (Kim et al., 2012). As consumers have advanced past the point where satisfaction and quality alone are indicative of the experiences they seek, memorable experiences are a new standard by which experiences will be measured and should be incorporated into the study of customer experiences (Kim et al., 2012). It is important to understand the impact memory has as research has shown that it greatly influences future behaviour (Kim et al., 2012). When an experience is memorable, consumers are more likely to report being satisfied with the experience, recommend the experience to others, revisit the experience, and report that the experience was personally meaningful (Campos et al., 2016).

Tourists have different experiences even if they are doing the same thing in the same place, as their moods, interests, backgrounds, and personal feelings at that moment affect their interpretations of the experience. Even if all tourists say that they enjoyed themselves during an experience, it does not necessarily mean that they had the same memorable experiences (Kim et al., 2012). As our memory is also limited in capacity, not all experiences will translate into memories. The degree of attention an individual pays to a subject is an important influencer of what will become encoded in our minds and recalled (Campos et al., 2016). In a study exploring the importance of co-creation in enhancing tourists' attention and memorability of a dolphin swimming experience, Campos et al. (2016) found that active participation, interaction, and attention helped improve experience memorability. Kim et al. (2012) also explored factors that contribute to the memorability of an experience. They found these to include affective feelings (sociability, pleasure, happiness, irritation, guilt, sadness, worry), cognitive evaluations (meaningfulness, challenge, reflection), and novelty (unusual, atypical, or distinctive events). Using these factors, Kim et al. (2012) developed seven constructs within a tourism experience that are most likely to contribute to memorable tourism experiences: hedonism, novelty, local culture, refreshment (perceived freedom, revitalization, renewal), meaningfulness (learning about oneself), involvement, and knowledge. Destination managers can obtain useful marketing information by utilizing these seven constructs as a scale. They can learn how their businesses rank against their competition across the seven components of memorable experiences and use this knowledge to adjust marketing and program content (Kim et al., 2012).

Understanding the importance of creating memorable experiences can help inform and improve programming. Experience managers can incorporate activities that help customers learn about themselves or local cultures, thus bringing more meaning to the tourism experience (Kim et al., 2012). Additionally, managers should think about creating the right blend of education and entertainment, incorporating unexpected moments of novelty or surprise, developing activities that hold attention and require mental focus or active participation, and interactions with others that contribute to enhanced attention. The recollection of tourist experiences is important because remembered experiences will determine revisitation, recalled satisfaction, and recommendations (Le et al., 2019). As memory fades over time, sensory cues and post-trip marketing stimuli can lead to the reconstruction of positive tourist memories (Le et al., 2019). Tourism operators should regard memorability of the experience as a key factor in securing competitive advantage in the experience economy as a memorable experience can satisfy the learning and creation needs of tourists (Wang et al., 2020) and is linked to the meaningfulness of the experience (Campos et al., 2016).

Experiential Marketing

As Pine and Gilmore (1999) noted in their experience economy work, companies have moved away from traditional product marketing toward marketing experiences for their customers. Customers today take product features and benefits, quality, and positive brand image as a given; they want products that deliver an experience that dazzles their senses, touches their hearts, and stimulates their minds (Schmitt, 1999). They want something they can relate to that expresses their personality and fits with their lifestyles, values, and self-construct; they want a brand that can deliver an experience (Schmitt et al., 2009). Experiences connect consumers in a personal and memorable way through providing sensory, emotional, cognitive, behavioral, and relational values, which replace the functional values provided by commodities, goods, and services (Schmitt, 1999). Schmitt (1999) has said that this shift in marketing has come about as a result of three phenomena: the prevalence of technology has created increasingly connected and informed consumers, branding has become prevalent and brands have become synonymous with a type of experience and self-identity, and companies have become more focused on the customer, community, and entertainment (Schmitt, 1999). These phenomena spurred the movement from traditional marketing to experiential marketing (Schmitt, 1999).

Experiential or experience marketing has been defined as a customer-focused marketing activity that connects a customer to an organization by focusing on experiences, engagements, and interactions (Schmitt, 1999). It is about taking the essence of a product and amplifying it into tangible, physical, and interactive experiences (Atwal & Williams, 2017 as cited in Ketter, 2018). Experiential marketing is distinct from traditional marketing in four key ways: it focuses on the experience of the consumers, treats consumption as a holistic experience that involves tangible and intangible aspects, recognizes both the rational and the emotional drivers of consumption, and uses eclectic methodologies and marketing channels to deliver emotions and complex messages (Schmitt, 1999). Experience marketing is a key component of creating an experience as it shifts the marketing focal point from the characteristics of the destination to the tourists' experiences of engaging the senses, feeling (creating moods and emotions), thinking (having a transformative experience or gaining a new perspective) acting (encouraging a particular behaviour and action), and relating (inspiring social interaction and a sense of belonging) (Schmitt, 1999; Ketter, 2018). According to Pine and Gilmore (1999), the experience is the marketing; a strong experience will create memorable impressions, build brands, and lead to word-of-mouth marketing.

From the supply perspective, developing a memorable and highly emotional experience is key to competition and business success (Pine & Gilmore, 1999; Ketter, 2008). From the demand perspective, in their decision-making process, tourists are seeking experiences that meet their needs instead of just being sold a product. Experiential marketing delivers value to consumers as it satisfies the consumers' search for emotions, memorable experiences, and the satisfaction of social and psychological needs via consumption, such as needs for meaning, identity, authenticity, and happiness (Boswijk et al., 2007 as cited in Ketter, 2018). Sidali et al. (2015)

have said that tourists seek experiences ranging from purely hedonic and pleasurable to a search for novelty and authenticity to seeking opportunities for emotional catharsis (as cited in Ketter, 2018). According to this view, the tourist's vacation choice is not about consuming a travel product but about having an experience of a lifetime, as memorable experiences are considered of greater importance than products and services (Ketter, 2018). Experiential purchases have also been found to provide consumers with more satisfaction than material purchases (Schmitt et al., 2009; Pine & Gilmore, 2019). There is an expectation that by visiting the destination, tourists desire a personal and meaningful experience that promotes personal growth and self-actualization (Kirillova et al., 2017 as cited in Ketter, 2018). As such, it has been argued that the quality of the experience, and not the quality of the goods and services, will make the experience memorable (Pizam, 2010 as cited in Ketter, 2018). Knowing this, destinations can attract visitors not only by listing the tangible assets of the place but by promoting the intangible experience that is waiting for them (Ketter, 2018). The businesses that will thrive in a competitive travel economy will be the ones that are most aware and aligned with both their customers' purchase behaviours and personal values (Ketter, 2018).

Extraordinary Experiences

As the tourism industry increasingly finds itself in competition with other leisure-related industries for the attention of the time-starved public, gaining a competitive advantage is more likely to fall to those providing particularly extraordinary experiences (Pine & Gilmore, 1999). Building upon Pine and Gilmore's concept of the experience economy, research has been done to better understand what differentiates ordinary versus extraordinary experiences and average experiences versus meaningful experiences (Mehmetoglu & Engen, 2011). Where ordinary experiences are seen to be common and frequent, extraordinary experiences are uncommon, infrequent, emotional, meaningful, unique, and have the power to transform thoughts or behaviour (Husemann et al., 2015 as cited in Duerden et al., 2018). Similarly, Jefferies and Lepp (2012) define extraordinary experiences as highly memorable, special, emotionally charged, spontaneous, and contributing to personal growth or renewal. Extraordinary experiences have also been compared to Csikszentmihalyi's (1990) concept of flow; an experience resulting from engaging skill with a challenging activity, characterized by the transformation of time (passing quickly or standing still), intrinsic reward, deep concentration, a loss of self-awareness, and a sense of control (as cited in Jefferies & Lepp, 2012). While extraordinary experiences have similarities with flow, they differ in that they are associated with novel or unique events that typically involve high emotional intensity, may entail a greater sense of newness or originality, might not require superior effort, and may be more interpersonal in that they are often triggered by reflective interaction with others (Jefferies & Lepp, 2012; Duerden et al., 2018).

In order to create extraordinary experiences, Jefferies and Lepp (2012) suggested that experience developers use tactics such as incorporating novelty or surprise into social and physical settings in order to facilitate emotionally charged experiences. High investment activities involving competition or a sense of accomplishment, like learning a new skill, can be built into programming to elicit feelings of growth and development (Jefferies & Lepp, 2012). Contrary to the common practice of packing as many activities into a day as possible, research has found that reflection allows for complex experiences to be understood and appreciated and allows individuals to see positive change within themselves (Jefferies & Lepp, 2012). Program managers can stimulate reflection through focused discussion, writing, introspection, or through education (Jefferies & Lepp, 2012). In addition to these tactics, Arnould and Price (1993) found that the most memorable and emotionally charged experiences involved connecting with nature and strengthening social connections with others through camaraderie and community building (as cited in Jefferies & Lepp, 2012). Managers can build these tactics into their programming to encourage consumer engagement and develop experiences that are viewed as extraordinary.

Providing leisure and tourism professionals with an understanding of experience types will help them to more intentionally design a specific and desired type of experience for the consumer. As competition increases within the experience economy, only the best experience providers will thrive. Thus, aptitude in consumer and user experience will become essential skills for tourism businesses. Creating the "right" experience demands specific knowledge of the content needed by the customer. As Pine and Gilmore's (1999) aforementioned experiential dimensions of education, escapism, aesthetics, and entertainment have significant effects on consumer satisfaction, these elements can be used by tourism managers when developing their products and services (Mehmetoglu & Engen, 2011). In order to meet market needs and demands, it is important to create experiences that capture the essence of immersion through feeling, learning, being, and doing (Mehmetoglu & Engen, 2011). It is when all these senses become involved that the experience feels meaningful or extraordinary for the individual (Pine & Gilmore, 1999). Extraordinary experiences can benefit the individual through producing strong emotions and memories, facilitating the discovery of significant and personally relevant insights and meaning, and eliciting personal transformations in values, beliefs, intentions, or self-perceptions (Duerden et al., 2018).

Tourism Experience Shifts and Trends Resulting From COVID-19

COVID-19 has been a significant disruptor to global tourism resulting in major transformations for the tourism industry as consumer behaviour, demand, and values shift (Rogerson, 2021; Destination Canada, 2021a). Tourism businesses have had to adapt through product diversification, price reduction, reduced staff and capacity levels, modifying target markets, changing marketing tactics, and building new business partnerships (Rogerson, 2021). Many tourism providers scaled back operations and services during COVID-19, downgrading the quality of experiences delivered in response to pandemic-related factors such as supply chain issues, increasing costs, labour shortages, and reduced revenue resulting from plunging demand (Destination Canada, 2021a). Consequently, many tourism businesses have been forced to close as access to capital and government grants diminish, further affecting the quantity and quality of tourism experiences. However, as international borders have started to reopen, demand for tourism experiences is increasing and the tourism industry is starting to rebuild despite a devastating setback, albeit in a very different global market. What visitors value and where they spend their attention, time, and money are changing (Destination Canada, 2021a). Destinations and businesses that understand these shifts in experience preference and consumer behaviour will be better equipped to adapt their operational models; improve products, services, and experiences; better focus their marketing budgets; and prepare for what the future holds for the industry (Destination Canada, 2021a). As tourism businesses start to rebuild, it is important to refocus on creating compelling experiences and adaptive strategies as the degradation of tourism experiences threatens the reputation of both individual businesses and destinations (Alonso et al., 2022). The tourism industry must have the capacity to adapt experience offerings according to what the new state of tourism demands (Alonso et al., 2022). Monitoring trends and understanding shifts in experience development is a key step to helping the industry minimize risk and maximize market opportunities (Destination Canada, 2021a). As such, examining experience development trends, both globally and locally, will provide insight into what tourism businesses are doing to thrive and capture consumer attention in the new era of tourism. Some of the key shifts in tourism experiences and recent industry trends are identified below.

Acceleration of Digitalization and Virtual Experiences

Social distancing and travel and gathering restrictions accelerated the use of technologies by both tourists (information about travel restrictions, online COVID-19 alerts, and hygiene measures) and businesses (online food delivery, virtual cooking experiences, virtual events, virtual tours of attractions and destinations) during the pandemic (Sigala, 2020). Consumer adoption of technology has generated vast volumes of data, making it possible for tourism operators and destinations to utilize data analytics to track consumer behaviours, understand the consumer journey and preferences, and provide insights on products and experiences supporting informed decisions around pricing, marketing, and product development (Destination Canada, 2021a). Technology is also moving the tourism industry to a place where seamless and frictionless travel experiences are consumer expectations as digital technology is used to increase connection, improve security, and help drive a better consumer experience (Destination Canada, 2021a). During COVID-19, we saw the proliferation of contactless technologies such as mobile applications for hotel check-ins, mobile payments and travel bookings, self-service kiosks, in-room technologies for entertainment and shopping, robots for concierge and food services, digital wallets and payments, artificial intelligence-enabled websites, and chat boxes for customer communication (Sigala, 2020). As accelerated digitalization has placed more emphasis on customer experience and needs, businesses may need greater investment in technology and systems required to deliver exceptional experiences and anticipate consumer expectations and needs more quickly and proactively than the competition (Diebner et al., 2020).

Although the tourism industry has used virtual reality (VR) and augmented reality (AR) technology for years to market destinations to potential customers, as the pandemic brought about border closures and social distancing a new urgency to create virtual experiences ensued as a way to stay connected with consumers (Godovykh et al., 2022). Thus, meetings and events were moved online via digital platforms like Zoom, marketing efforts predominantly focused on digital, and tourism sites and venues engaged with consumers through virtual tours and AR and VR experiences (Godovykh et al., 2022). Virtual experiences were safe and accessible options to connect with consumers during COVID-19 while also minimizing tourism pressures such as overtourism and environmental impact (Godovykh et al., 2022). However, there are notable limitations of virtual experience such as limited sensations (touch, smell), and the perception that virtual is more inauthentic and impersonal than traditional tourism (Godovykh et al., 2022). Tourists may also crave serendipitous moments, new experiences, adventure, and discovery that simply can not be recreated in virtual reality. Although virtual experiences may not replace traditional travel, they still offer intriguing possibilities to connect with customers and augment visitor onsite experiences. For example, Travel Alberta has implemented virtual tours through their “Alberta at Home” experiences where you can engage with some of the province’s most popular destinations and attractions through virtual guided tours, live-streamed events, and videos (Travel Alberta, 2022). Alberta Food Tours has also developed self-guided food tours during the pandemic via a mobile application when in-person tours could not operate. The tours were set up as a game where players generate their own experiences to discover hidden gems and explore the food, art, and history of neighbourhoods in Calgary, Alberta (Alberta Food Tours, n.d.).

Domestic Travel

In response to travel restrictions and the decline in tourism, destination management organizations and tourism operators relied on domestic markets for revenue in the absence of international visitors. Operators had to adjust existing experience offerings and marketing tactics to focus on domestic tourists. Some businesses increased their online and social media presence to market themselves to new domestic markets, lowered rates to entice domestic tourists, or introduced new offerings like family-friendly and nature experiences that would be attractive to domestic tourists under travel and social distancing restrictions (Rogerson, 2021). On the travel demand side, a key trend that started to emerge was the importance of familiarity with a destination which has further translated to an uplift in short-haul travel as some seek the comfort and security of staying closer to home (Southan, 2021).

Travel Alberta pivoted their marketing efforts during the pandemic by launching the "worth the wait" campaign targeting Albertans who typically travel outside the province encouraging them to spend their money locally and reminding them of the hidden gems in their own province (Travel Alberta, 2021). Although domestic travellers do not spend as much as international travellers, they may be enticed to visit off-the-beaten-track experiences that international visitors might not consider (Travel Alberta, 2021). Domestic travellers may also have the potential to be long-term loyal customers and travel ambassadors, helping to encourage travel in the short term and make up for some of the lost international visitation spending (Travel Alberta, 2021). However, a changed focus from international to domestic markets also has implications for tourism providers as they adjust their experience offerings to target different markets.

Conscious Travel

A pause in global travel during the pandemic brought about a focus on tourism's impact on the environment and local populations and renewed awareness of issues such as overtourism, infrastructure strain, preservation of cultures and nature, and overreliance on tourism dollars (Destination Canada, 2021a). Not only has socio-environmental consciousness towards travel proliferated during COVID-19, but the pandemic has also created a pent-up demand for travel and a desire to meaningfully connect with people and places (Destination Canada, 2021a). There is growing research indicating consumers are seeking ways to travel more responsibly, support local economies and local cultures, reduce their carbon footprint and contribute towards "regenerative travel" benefitting local communities economically, socioculturally, and environmentally (Destination Canada, 2021a, p. 35). This movement may have implications on the experiences travel operators create to better connect with audiences seeking more meaningful, authentic, and impactful tourism experiences, with some reports predicting the rise of conscious travel as a major trend in 2022 (Southan, 2021). There has also been a movement away from travelling for social prestige and social media "likes" and towards travel that is personally meaningful (Southan, 2021). Conscious travellers are more discerning about the journeys they go on, they are willing to travel longer but less often, they want to engage with local communities in respectful ways and form meaningful human connections, they are less reckless with their travel spending, want local and authentic experiences, seek out tourism operators that are minimizing their impact on the planet and want to give back to the destinations they visit (Southan, 2021). Some travellers are also looking to minimize the number of people they come into contact with as the COVID-19 virus is still a lingering threat, which in turn has increased demand for smaller, more local accommodation options and travel experiences (Southan, 2021).

Outdoor and Adventure Experiences

Social distancing measures imposed during the COVID-19 pandemic such as reduced social contact, avoiding crowds, and minimizing travel, impact how travellers experience and evaluate leisure and travel activities and influence tourists' perceptions of which experiences may pose health hazards (Sigala, 2020). Social distancing drove many travellers to open spaces and natural attractions as an antidote to confinement and a way to remain distanced from others while still engaging in leisure experiences (Destination Canada, 2021a). The closure of fitness centres encouraged people to be active outside, a habit that many have continued post-COVID-19 lockdowns (Southan, 2021). People also increasingly started looking to nature to enhance wellness, manage anxiety, feel connected, and engage in adventure and physical fitness (Destination Canada, 2021a). Prolonged periods at home and having the freedom to travel taken away has driven a shift in people's mentality to take those once-in-a-lifetime trips while they can (Southan, 2021). This has led to an increased sense of adventure and search for escapism, hence challenging adventures such as Everest Basecamp, Kilimanjaro, and the Inca Trail have seen a resurgence in popularity (Southan, 2021). The pandemic has drastically changed peoples' habits and interest in the outdoors but we have yet to see whether this will have a lasting effect on the experiences travellers will seek in the future.

Wellness and Hygiene

Tourist perceptions of risk associated with the spread of the pandemic have resulted in shifts in consumer demand to which businesses have to adapt (Rogerson, 2021). Travellers are understandably cautious after multiple new strains of the COVID-19 virus have emerged and travel restrictions have changed often. Customer reviews are becoming increasingly vital, both online and by word of mouth, as consumers seek recommendations and reassurance about

COVID-19 health and safety measures (Southan, 2021). Tourism companies have raced to implement safety measures such as upgrading cleaning procedures, adopting new health and safety standards, obtaining health certifications, implementing contact tracing, incorporating contactless payment and operation methods, and retraining staff to ensure the safety of customers and securing their brand image (Sigala, 2020). Tourism companies also redesigned experiences to feature smaller groups, virtual tours and experiences, outdoor activities, and private experiences, complying with social distancing and gathering restrictions (Sigala, 2020).

As safety, hygiene, and social distancing became predominant concerns during COVID-19, so did a renewed focus on the importance of personal wellbeing. During the pandemic, we saw increased loneliness, decreased mental health, a lack of connection to others, and concern for personal health (Destination Canada, 2021a). Not only is there pent-up demand for travel and novel experiences, but also the sense of escape, rejuvenation, and connection that is often associated with travel (Destination Canada, 2021a). According to the Global Wellness Institute, the wellness travel market was estimated to be growing at more than twice the rate of tourism overall (Destination Canada, 2021a). This may lead to significant opportunities for destinations and tourism providers to capture part of a rapidly-growing industry.

Remote Work

COVID-19 caused a rapid shift to remote work for many office-based roles as a way to enforce social distancing and avoid health concerns associated with travelling during the pandemic (Destination Canada, 2021a). This gave rise to "workations" where visitors combine work with vacations, staying for longer periods of time in a certain place (Southan, 2021). Longer stay holidays increased in 2021 as the digital nomad trend gained popularity and is expected to remain a top tourism trend in 2022 as the global economy reopens (Southan, 2021).

As this trend has resulted in remote workers becoming a new visitor segment in many countries, tourism businesses and destinations need to be cognizant of this new segment and rethink the experiences they offer beyond what is typically available for shorter-term visitors (Destination Canada, 2021a).

Greatest of All Trips (GOAT) Mindset

An Expedia Travel Trends Report for 2022 predicts the biggest tourism trend will be the "GOAT" (Greatest of All Trips) mindset; a “go big” and “no regrets” style of travel pursuing transformative and meaningful travel experiences (Expedia, 2021). Expedia's (2021) research polled 12,000 travellers across 12 countries and found that travellers are seeking out excitement and exhilaration in their travel experiences (41%), the feeling that they have made the most out of their trip (40%), and are more willing than before to splurge on their future travels (40%) to make up for lost time during the pandemic. This report predicts that in 2022, travellers will indulge more in luxury experiences, room and flight upgrades, and bucket-list experiences and destinations, splurging on value-adds that will enhance their trips (Expedia, 2021).

Long periods of social and travel limitations have led to demands for novel and spontaneous experiences and a renewed curiosity to learn and experience the world (Expedia, 2021). American travellers are reported to be more inclined post-pandemic to step outside of their comfort zones and immerse themselves in novel and sensation-seeking experiences such as trying new foods and local delicacies, seeking out off-the-beaten-track experiences and destinations, and a willingness to try daring or high adrenaline activities and experiences (Expedia, 2021). Traveller priorities are also shifting towards a greater focus on staying present and mindful in their travels, with nearly a quarter of American travellers in an Expedia Travel Trends Report (2021) planning to spend less time on their mobile devices and more time immersed in their destination to ensure they fully experience all it has to offer. Coming out of a long period of constraints and limitations, this report predicts that 2022 will be about the quality of rich and meaningful experiences for consumers, rather than the quantity of travel (Expedia, 2021).

In summary, the pandemic has been a significant disruptor to the tourism industry resulting in changing consumer behaviour, demand, and values (Rogerson, 2021; Destination Canada, 2021a). An aptitude in consumer experience delivery and the ability to adapt experience offerings according to shifting consumer needs will be important skills for tourism businesses seeking to create experiences that are robust enough to survive plunges in the market, personalized enough to demand a price tag, and differentiated enough to stand out from the competition (Kaur & Kaur, 2020). The experience development concepts of co-creation, memorability, extraordinary experiences, and experiential marketing are key components of designing and delivering in-demand experiences. In addition to understanding experience development, monitoring trends is key to maximizing market opportunities (Destination Canada, 2021a). Accordingly, questions on trends and experience-based concepts were incorporated into the interview questions to determine the level of experience and trend knowledge of operators and whether this knowledge is being applied during experience development. Gathering this information can help evaluate how aligned Alberta tourism operators are to shifting markets and customer needs and purchase behaviours. In addition, the interview responses may help to establish if there are gaps in experience development knowledge and skills that may need support from destination management organizations. As the Alberta tourism industry starts to rebuild, it is important to refocus on creating compelling experiences and adaptive strategies as the degradation of tourism experiences during the pandemic threatens the reputation of both individual businesses and the province as a destination.

Methods

Research Design

In order to explore the changing tourism experience development landscape in Alberta, qualitative methodology was used to conduct an exploratory investigation of Alberta tourism operations with interviews as a primary source of data. As the aim of this study was to gather insight into how tourism experiences, consumer behaviour, and target markets have evolved during the COVID-19 pandemic from the perspective of Alberta tourism operators, a qualitative research method was chosen as qualitative data seek to explain "how" and "why" a phenomenon or behaviour occurs (Yin, 2003). Qualitative research involves the study of people and things in their real-world settings, represents the views and perspectives of a study's participant and not the researcher, embraces the contextual conditions (social, institutional, cultural, environmental) within which people's lives take place, and contributes insights from existing or new concepts that may help to explain behaviour and thinking (Yin, 2003). Qualitative research also attempts to interpret phenomena in terms of the meanings people assign to them which may be done through a range of methods including interviews, direct observations, documents, visual materials, or personal experience (Denzin & Lincoln, 2005).

Semi-structured interviews were used to gather in-depth knowledge on how Alberta tourism providers adapted their experience offerings during the COVID-19 pandemic. Interviews were chosen, as opposed to questionnaires or surveys, to gain deeper insight and detailed responses from operators rather than general patterns and trends that surveys and questionnaires often produce from a wider selection of people. As the interview questions were semi-structured, a predetermined set of questions was used but the interviews allowed for open-ended responses from the operators. This approach defined a concrete issue (i.e., experience adaptation, target markets, consumer behaviour changes), while still allowing flexibility for interview participants to share their own opinions, perspectives, and examples according to their subjective experience and understanding of experience adaptation during COVID-19. Granting interview participants the flexibility to shape their answers helped to obtain richer and more descriptive interview responses. Descriptive responses were beneficial to this research as descriptive data illustrates the complexities of a situation and presents information from a variety of sources and viewpoints (Brown, 2008).

As a descriptive exploratory study of tourism operator adaptation, the research did not aim to provide final and conclusive answers to the research questions, but merely explored the research topic with varying levels of depth (Dudovskiy, 2022). Exploratory studies are often conducted using interpretive research methods in an attempt to answer questions focused on the what, why and how, helping to better understand a problem rather than offering conclusive solutions to the problem (Dudovskiy, 2022). To this end, this exploratory study sought to study how tourism operators have changed the design and delivery of their experiences in response to the COVID-19 pandemic (the "how"), the strategies they have implemented to respond to the COVID-19 crisis (the "what"), and strategies for building a more resilient and adaptive tourism industry in the future (the "why"). This study did not seek to establish representativeness or wider generalization but rather aimed to explore experience development strategies and document the experiences of individual tourism businesses in the province of Alberta in response to a global pandemic. As interviews were conducted between July- August 2022, the interview responses and assumptions reflect the operating context of that time. For the purposes of this paper, this period of time is referred to as "post-COVID-19" as stringent public health restrictions in Alberta were lifted, including masking and social distancing, and borders began to reopen to international travel with pre-arrival COVID-19 testing lifted for fully vaccinated travellers on April 1, 2022 (Public Health Agency of Canada, 2022). As such, tourism businesses were operating at a time when momentum was positive for rebuilding tourism in light of reduced COVID-19 measures, increasing tourism visitation to Canada, pent-up travel demand, and largely positive consumer sentiment (Destination Canada, 2022a).

Data Collection and Sampling

Potential interview participants were selected based on the following criteria: whether they were a tourism operator in Alberta; whether they had been involved in the development or delivery of tourism experiences pre, during, and post-COVID-19; and either owned or helped manage a tourism business so they had some authority and expertise in the area of experience development and adaptation. Lists of tourism businesses to potentially interview were sourced from destination management websites in Alberta such as Travel Alberta, Explore Edmonton, Banff and Lake Louise Tourism, Tourism Jasper, and Tourism Calgary.

Forty-six tourism operators in Alberta were emailed for potential interviews; a total of 15 agreed to be interviewed for this study. As there is no minimum sample size in qualitative inquiry, interviews were stopped once data saturation had occurred and no new information was revealed by further participant selection (Patton, 1990). I attempted to target a broad range of tourism businesses operating in different markets (i.e., culinary tourism, adventure tourism, cultural tourism, etc.) to gather as many different perspectives as possible; however, the range of participants was limited by those who agreed to be interviewed. Table 1 indicates the tourism sector, business category, and business location of the interview participants. A nonprobability convenience sampling method (Frey, 2018) was used where interviews were conducted with tourism operators to which I had access and who responded to my interview request. The interview sample included more city-based than rural or town-based operators, a greater number of attraction and accommodation operators than other sectors, and an almost even split between large and small operators. Although a variety of operators were interviewed, the opinions in this study are slightly skewed toward the aforementioned participant categories with greater representation. The study results were not generalizable to the broader tourism industry in Alberta; however, convenience sampling is an appropriate method for exploratory research as this study examined the in-depth subjective experiences, perceptions, and responses of a small selection of tourism operators in Alberta.

Table 1 Interview Participants

Pseudonym	**Sector**	**Business Category**	**Location**
1	Accommodation	Owner operated small business	Nordegg, Alberta
2	Festival	Non-profit, festival	Edmonton, Alberta
3	Museum, community centre	Non profit, community centre	Red Deer, Alberta
4	Attraction	City owned attraction	Edmonton, Alberta
5	Accommodation, activities	Owner operated small business	Three Hills, Alberta
6	Accommodation, meetings & events	Corporation	Edmonton, Alberta
7	Tours	Owner operated small business	Calgary, Alberta
8	Festival	Non-profit, festival	Edmonton, Alberta
9	Tours	Owner operated small business	Canmore, Alberta
10	Attraction	City owned attraction	Edmonton, Alberta
11	Attraction	Private attraction	Edmonton, Alberta
12	Accommodation, meetings & events	Corporation	Calgary, Alberta
13	Accommodation, culinary	Owner operated small business	Drumheller, Alberta
14	Tours	For-profit with multiple brand extensions	Banff, Alberta
15	Attractions, events	Corporation	Edmonton, Alberta

As potential interviewees could be based anywhere within Alberta, the interviews were conducted either over the phone or via virtual video calling platforms such as Zoom. This also allowed the interviews to be recorded, either over the phone or through Zoom, and transcribed via an online transcription tool, Otter.ai, facilitating the ability to thoroughly review participant answers and look for trends in the data and emerging themes. The interviews lasted between 30 – 60 minutes in length.

Ethics

The ethical considerations of this study were done in accordance with the University of Alberta Research Ethics Board. Individuals in the study were informed of the project through a study information and consent letter sent via email once the participants agreed to be interviewed. Interviews were confirmed via email where participants were asked whether they were comfortable if the interview was recorded. Participants were also sent calendar invites which also included study and consent information. At the beginning of each interview, an interview script was read notifying the participants of the study's purpose and once again asking for participation consent and consent for the meeting to be recorded. The anonymity and protection of respondent identities were guaranteed and thus identifying information has been anonymized. Project approval was obtained through the University of Alberta Research Ethics Board before interviews were conducted.

Interview Questions

Eight interview questions were chosen to guide the discussions and were informed by the five experience development concepts identified in the literature review. Within each of the eight overarching questions were follow-up probes (identified as bullet points "a," "b" and "c" under each numbered question) if a more detailed response was required. These interview questions were:

1. Has COVID-19 changed your target market? Which markets did you serve pre-COVID-19, during COVID-19, and now? Who do you foresee being your target market in the next few years?
    a. Is there a difference between what international markets seek versus Canadian markets?
2. What kinds of experiences are consumers now seeking and how has this changed during COVID-19?
    a. How do you know what consumers want?
    b. Are there current consumer behaviours or preferences that stand out to you?
    c. Have you incorporated opportunities for co-creation into your experiences (customers interacting with the business to generate their own meaningful experience) and what does this look like during COVID-19 when there might be less interaction with customers?
3. How did you adapt or modify your experiences during COVID-19?
    a. How are you developing experiences to reach differing target markets (i.e., from international to domestic markets)?
    b. Were there experience development concepts or experience economy knowledge that helped guide your experience adaptation?
    c. What was successful and unsuccessful?
4. Have you noticed the emergence of any experiential trends or innovation in experience development?

5. Has storytelling played a role in your experience development strategy? If so, how?
6. What lessons were learned throughout the COVID-19 pandemic that would support the resiliency of Alberta's tourism experiences in the future?
7. As tourism rebounds in Alberta, how will you differentiate your experiences?
    a. How will you make your experiences more extraordinary or memorable for your customers? What techniques or knowledge will be used?
    b. How will you market your experiences in a competitive marketplace? What techniques or knowledge will be used?
8. Which tools or research were helpful in developing and adapting your experience development strategy (i.e., market research, demographics, trends, etc.)?
    a. Are there areas of research that you would like to see or would be helpful to know more about?

Data Analysis

Data analysis for this study was approached from an interpretive perspective as the interview questions explore the ideas, experiences, and perspectives (Guba & Lincoln, 1994) of Alberta tourism providers and look for commonalities in reported experiences and perspectives. The use of an interpretive perspective contributes to knowledge of individuals and phenomena as it focuses on how people define their reality (Yin, 2003). As this study aimed to gain an in-depth look at the responses of tourism operators, the Results section outlines how the operators responded to the interview questions and whether any commonalities, trends, or themes existed among the responses. The interview transcripts were assessed for patterns and categorized according to the themes that emerged. Thematic analysis is a method of identifying, analyzing, and reporting patterns or themes within data (Braun & Clarke, 2006). It allows for organizing and describing the data set, lending to the interpretation of the various aspects of the research topic (Braun & Clarke, 2006). Themes capture something important about the data in relation to the research questions and represent a patterned response or meaning in the data (Braun & Clarke, 2006). Descriptive coding was used to summarize the data based on experience development concepts and experience adaptations to COVID-19 as seen in the literature review. The study results were organized by three broad themes that emerged in the data: target markets, experience development and adaptation, and strategy.

Results

The interview questions in this study were developed to explore how tourism experiences, consumer behaviour, and target markets in Alberta have been affected throughout the COVID-19 pandemic. The interview questions also probed into experience development concepts identified in the literature review such as co-creation in question 2, experience economy in question 3, storytelling in question 5, extraordinary or memorable experiences in question 7, and marketing in question 7. Responses were organized by three broad themes that emerged: target markets (interview question 1), experience development and adaptation (interview questions 2, 3, 4), and strategy (interview questions 5, 6, 7, 8).

Target Markets (Interview Question 1)

During the COVID-19 pandemic, Canada closed its borders to international travellers and restricted inter-provincial travel with varying degrees of stringency depending upon the province. In response to travel restrictions and the decline in international tourism, tourism operators relied on domestic markets for visitation during this time. Since Canada opened its borders to international travel on April 1, 2022 (Public Health Agency of Canada, 2022), there was a slow reintroduction of international visitation at the time of interviews. Consequently, it was expected that operator reports would have affirmed a reliance on domestic visitation for revenue. However, a slightly more unexpected trend in the interview responses was the number of operators who stated that their total visitation numbers were stronger than they were before the pandemic.

Type of Visitor Markets

Coinciding with pandemic travel restrictions, most operators reported that visitation was dominated by domestic markets during the pandemic (interviews 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 14, 15). Three of these operators remarked that their target markets were mostly local and regionally focused pre-COVID-19, thus the pandemic did not have an effect on the type of markets they targeted (interviews 2, 3, 4). As for post-pandemic visitation, operators found that international markets were still lagging from pre-COVID-19 levels (interviews 1, 3, 8, 9, 10, 14, 15). The factors contributing to lagging international markets were reported to be challenges with flight cancellations, difficulty finding rental vehicles, increasing costs of travel, busy airports and border crossings (interviews 1, 8), and limited group travel (interview 14). Two rural accommodation providers reported seeing more out-of-province visitation since COVID-19 restrictions had lifted than they experienced pre-pandemic (interview 5, 13).

Levels of Visitation

As travel and capacity restrictions during the pandemic limited total visitation numbers for tourism operators in Alberta, it was expected that the interviewees would report higher visitation levels now that COVID-19 restrictions have been lifted. However, several operators reported greater overall visitation post-pandemic than they experienced pre-pandemic (interviews 5, 4, 7, 9, 13, 14). The reasons given for seeing greater visitation included: there is a pent-up demand for travel, people do not want to stay confined in their homes any longer, pandemic lockdowns made people realize that being with others and experiencing things are important, people want to be active, and people want a sense of normality (interviews 5, 4, 7, 9, 13, 14). Only one operator reported seeing less visitation now than during the pandemic because of greater competition from festivals, restaurants, and attractions (interview 11).

Differences Between International and Canadian Markets

Some operators stated there is either no difference between what international and domestic travellers seek (interview 7) or that they do not tailor experiences to target different markets (interviews 1, 9). Operators that did report differences between what domestic and international audiences wanted gave the following reasons: local audiences tend to support local artists more (interview 8); international visitors want information about history, culture, and Indigenous experiences (interview 9, 10, 15); international markets are more interested in organized tours with transportation as they might not have access to a vehicle or are not comfortable sightseeing on their own (interviews 10, 14); and international visitors want authentic Canadian experiences (interview 15).

Experiences and Adaptation (Interview Questions 2- 4)

Consumer Preferences

The literature review section cited some notable shifts in tourism experiences and trends resulting from COVID-19, including accelerated digitalization and virtual experiences, increased visitation to local attractions and offerings, conscious travel (Destination Canada, 2021a), outdoor and adventure travel, wellness-related experiences, “bleisure” travel (blended business and leisure travel) and “workations,” and a GOAT mindset (Expedia, 2021) where travellers are making up for lost time during COVID-19 lockdowns by seeking excitement and novelty in their experiences and are willing to spend more on travel experiences. The interview participants reported some similarities to these experience trends including outdoor and nature-based experiences (interviews 1, 4, 5), wellness-related experiences (interviews 4, 6), and the popularity of staycations due to some travel hesitancy (interview 12). Operators also noticed additional experience preferences not discussed in the literature review such as an increase in family-focused activities (interviews 1, 5), increased custom and private tours (interviews 7, 14), and strong interests in communal experiences (interviews 5, 9) and cultural experiences (interviews 2, 9, 10). One interviewee noted that people are desperately seeking connection post-COVID-19, whether it be to their land, their country, or to themselves (interview 9). Other operators emphasized the importance of authenticity as consumers seek authentic approaches to culture and history (interview 10) and want authentic Canadian experiences (interview 15).

Although the pandemic has increased the adoption of technology by both consumers and tourism operators (Destination Canada, 2021a), technology has both enhanced and detracted from the customer experience. Some operators shared that technology has enhanced their experience offerings (interview 2) or increased accessibility through removing financial and physical barriers (interview 8), but several operators also revealed that virtual experiences are not a replacement for in-person. Virtual fatigue has set in for many audiences and there is a desire to return to in-person experiences (interviews 3, 4, 6, 10, 15).

Not all operators interviewed agreed there was a change in consumer preference or behaviour following the pandemic. Some stated that consumers are seeking the same types of experiences as they were pre-pandemic (interviews 1, 3, 15), with one interview participant explaining, “I think it's just been a progression. So, the things that we were starting to focus on pre-COVID have just become stronger post-COVID” (Interviewee 15).

Consumer Behaviour

The consumer behaviours that were discussed by tourism operators fell into two broad categories: sentiment or attitude and purchasing behaviour. The behaviours and preferences mentioned were also not necessarily caused by COVID-19, as some started before the pandemic or may have been influenced by macro-environmental conditions at the time of writing such as rising inflationary prices and travel costs. Consumer behaviour patterns discussed by operators focused on cautiousness, value consciousness, safety consciousness, and heightened negativity. Reports of consumer cautiousness included a cautiousness towards gathering (interviews 2, 10,13), with one interviewee stating that hybrid programming may still be an important trend while hesitancy to gather still exists (interview 2). Travel hesitancy was also reported as travel remains difficult with flight cancellations and busy airports (interview 1), and staying locally or “staycations” were reported to still be popular (interview 12). Consumers were also reported to be non-committal and hesitant to book future events (interview 8). Interviewee 10 attributed hesitancy to consumer concerns regarding potential cancellation fees, attritions, and penalties if event attendance is cancelled or if attendance is low. Only one operator reported seeing more advanced bookings for adventure activities which he attributed to worldwide tourism staff shortages and consumer worry that an activity might be cancelled if not enough people book ahead (interview14).

Consumers were reported to be more budget and value-conscious (interviews 6, 13, 14), contradicting the GOAT mindset discussed in the literature review where travellers are willing to spend more on tourism experiences. Interviewee 6 stated that consumers are more concerned about getting value for their money as prices for goods and services have increased. Package deals and all-inclusive experiences became popular during the pandemic and are still being sought by budget-conscious consumers according to interviews 6 and 12. One of the hotels interviewed recognized a growing trend towards “bleisure travel,” or combined business and leisure travel in one trip (interview 6). The total number of business trips has decreased but the length of business stays has increased (interviews 6, 15) as consumers take advantage of cost savings associated with adding personal travel to a paid business trip. Some operators saw success with higher-end offerings such as 3-course meals and concierge services that targeted couples, individuals, and leisure markets (interviews 6, 11, 15), while others whose attractions are family-focused reported that people want inexpensive activities (interviews 2, 3).

Differing levels of concern regarding safety and cleanliness among consumers were also reported. One interviewee operating in the family and outdoor attraction sector stated that safety is still a top concern for their customers (interview 10), while another operator in a similar sector (rural accommodation) noted guests are willing to book accommodation stays but are not booking experiences such as plays just yet (interview 13). Another operator, also in rural accommodation, stated that safety, cleanliness, and social distancing were top of mind during COVID-19, but customers are not asking about these measures now (interview 1).

Heightened anger and greater incidences of negative visitor interactions were reported in interviews 4 and 11. One attraction hired security guards to de-escalate potentially harmful consumer behaviour and reported more fighting amongst children and a greater need to manage expectations of behaviour for both children and adults (interview 4). Another operator reported that customers have become more demanding during the pandemic and have increased their expectation levels, noting an attitude of entitlement, "like they were doing us a favour by bringing in business" (Interviewee 12).

Other consumer behaviours reported included a greater interest in buying local than pre-COVID-19 (interview 13); increased preference for contactless technology and digitalization such as finding information online, ordering and booking online, contactless check-ins, and payment (interviews 10, 12); and differing levels of consumer stamina towards events varying from a greater desire for experiences (interview 12) and an increase in multiple adventure activities in one day (interview 14), to audiences who are no longer interested in scheduling several events into one day (interview 8).

Knowing What Consumers Want

An understanding of what consumers want was revealed by two sources: the consumers themselves via feedback, surveys, and social media; or through others such as consultation with stakeholders to determine what consumers might want or examining what has been successful for other markets. Operators revealed that they gathered consumer information by asking their customers through surveys, social media, one on one conversations, or via email (interviews 4, 5, 6, 7, 8, 9, 15); they looked at what is popular in other markets (interviews 4, 11, 15); they consulted with partners (staff, volunteers, corporate partners, tourism operators, vendors, Destination Management Organizations) to determine what consumers were interested in (interviews 2, 4, 15); and new experiences were tested and scaled where the first iteration would be smaller and simpler and then adapted for larger audiences based on staff and consumer feedback (interviews 10, 11).

An interesting tactic to note was utilizing micro-influencers as representatives of a target market. A hotel operator shared that they partner with micro-influencers in the travel, hospitality, and food sectors to entice their social media followers to visit the hotel (interview 6). Interviewee 6 received valuable feedback from micro-influencers by asking questions about what inspires them to travel, what makes them partner with a particular business, and why they choose to engage in particular experiences (interview 6).

Some of the tourism operators admitted to not knowing what consumers want (interviews 3, 5, 12). Smaller businesses and owner-operators struggled to find the time or staff capacity to read existing research or do their own market research. Some comments included using a "gut feeling" of what people want from experiences because there isn't time to do market research (Interviewee 5), or using online marketing as a way to indicate whether there is interest in an experience rather than gathering feedback before an experience is marketed (interview 12). Waiting to see what was working in other markets was a common strategy seen among the operators, however, Interviewee 12 revealed their business should have adapted quicker: "We sat on some things and let the competition get ahead of us because we weren't sure that things were going to last instead of adapting quickly and abandoning quickly if it didn't work out".

Adaptations

The experience adaptations tourism operators implemented during the pandemic occurred in response to government health protocols to reduce the spread of the COVID-19 virus. Businesses in Alberta were subject to COVID-19 safety measures such as masking, hand sanitization, social distancing, reduced venue capacity, temperature checks, single-use plastics and individually wrapped food items, Plexiglass barriers separating people, temporary business closures, contact tracing, and COVID-19 health declaration forms. As businesses were required to comply with these safety protocols and COVID-19 restrictions, operators reported the following adaptation methods:

- Reduced capacity (interviews 1, 2, 4, 9, 10, 11, 14, 15)
- Social distancing (interviews 1, 5, 7, 9, 11, 14) and use of barriers like Plexiglass (interview 7)
- Hand sanitization (interviews 5, 7, 14)
- One-way directional systems (interviews 2, 4, 11)
- Registration was moved from in-person to online (interviews 2, 4)
- Staggered visitor check-ins (interview 5)
- Group tours were suspended (interview 4)
- Masking was required (interviews 4, 11)
- Use of pre-recorded content or virtual experiences (interviews 2, 4, 10, 15)
- Increased social media communications to engage with customers (interviews 3, 15)
- Extended length of their events due to reductions in customer capacities (interviews 2, 6, 10, 11)
- Food was served to customers individually rather than communal style (interviews 5, 14) or to take away (interviews 12, 13, 15)
- Indoor programs or events were moved outdoors (interviews 2, 9, 10)
- Businesses had to temporarily close (interviews 1, 3, 7, 11, 15)

Once COVID-19 restrictions lifted, operators stopped utilizing these adaptations with the exception of a few changes that improved customer experience. These improvements included purchasing tickets online which minimized in-person wait times (interviews 2,4) and staggered arrivals times allowing for personalized guest check-ins (interview 5). Social distancing restrictions led some tourism operators to use technology to create new hybrid or virtual experiences. New virtual experiences included plays and tours (interview 8), environmental education programs (interview 4), a murder mystery and paranormal investigation (interview 10), and an online local goods market (interview 13). A festival provider who was permitted to run their outdoor festival during the pandemic incorporated technology into their in-person experiences. For example, the use of soundscapes (sounds of music or storytelling) throughout the outdoor trails and videos of singing, dancing, and storytelling displayed cultural offerings during a time when singers, dancers, and storytellers could not gather in person (interview 2).

The hotel operators that were interviewed had to pivot their target markets from corporate to leisure in response to the decline in business travel during the pandemic (interviews 6, 12). As a result, both hotels shifted away from corporate conferences and room packages to leisure-focused experiences such as spa treatments, golf simulators, games rooms, in-room dining, and distanced yoga (interviews 6, 12). These new leisure and wellness activities focused on enticing individuals, couples, and families rather than business travellers. Two operators also created new higher-end experiences including personal shopping and concierge services (interview 15) and a higher-end 3-course outdoor dome dining experience (interview 11).

Adaptation Successes and Challenges

In addition to how experience offerings were adapted during the pandemic, operators were also asked which adaptations were successful and unsuccessful. The operators tended to frame successes as internal strategies or capabilities, for instance, creativity and strengthened partnerships. Whereas unsuccessful challenges or adaptations were mostly framed as external environmental challenges such as industry labour shortages, travel restrictions, and inflationary travel prices. Some internal capability challenges were also shared such as lack of skills and time. One operator revealed that operational successes resulted from "constraints forced creativity" as the pandemic forced businesses to do things differently making new ideas and reassessing business priorities more urgent (Interviewee 11). Operators reported their pandemic successes to be enhanced creativity (interview 11), a time to try new things (interview 12), and the addition of new hybrid and digital strategies (interviews 2, 8). Interviewee 11 shared that as staff and budgets were reduced during the pandemic, the business was forced to reassess their strategies and cut underperforming programs. The operator discovered that a one-day event takes the same amount of resources and marketing as a month-long event. In response, their one-day signature festival was extended to a month-long event to bring in additional revenue (interview 11). Additional pandemic successes included the industry forming stronger partnerships (interviews 10, 15), and technology improving audience accessibility (interviews 4, 8), visitor experience through online ticketing (interview 4), and staggered check-ins (interview 5).

Most experience adaptations were reported to be successful as they were implemented in compliance with government pandemic safety protocols. When asked about unsuccessful adaptations and challenges, operators shared internal challenges such as reduced budgets (interviews 3, 8); reduced staff, capacity, and time (interviews 3, 6, 12); and a lack of skills to adapt to technology (interviews 3, 12). External challenges affecting experience offerings included destination inaccessibility due to cancelled flights (interviews 1, 14), difficulty navigating changing COVID-19 restrictions (interview 1), and travel expense increases (interview 1, 8).

Strategy (Interview Questions 5-8)

Storytelling in Experience Development Strategy

Storytelling was generally discussed by the interview participants through their marketing and communications strategies. Operators held contrasting views of their need to engage in marketing: they either did little to no marketing or stated marketing and storytelling were very important strategies for their business. The reasons for doing minimal marketing were predominantly either time or knowledge constraints. The operators shared that keeping up with social media and marketing was challenging (interviews 1, 3, 7). One operator stated that marketing was not necessary because the business had minimal competition in a rural area (interview 1). A second operator shared that the destination they operate in is iconic and always busy, so marketing is not needed (interview 14). Interviewee 14 commented that people pick the destination first and then pick the activities once at the destination, thus, it should be destination marketing organizations that market the area to people, rather than individual operators.

In contrast to not utilizing marketing tactics, marketing was also used by operators to establish connection, trust, education, and communicate safety**.** Some of the comments focusing on the impact of storytelling included: stories connected people to cultures in a deeply profound way (interview 2); stories were central to authentic, collaborative, and experiential experiences (interview 10); and stories allowed for connection, engagement, and education (interview 4). Interviewee 8 spoke about using storytelling to create emotional impact and connect with audiences during pandemic closures. When referring to the cancellation of a festival during the pandemic, Interviewee 8 used storytelling to garner support from the community:

> […] storytelling is so powerful. And everything we do here we tried to do through story, because it does have that emotional impact. It is such an immediate way to connect with folks. […] if you want things you care about to still be here on the other side of the pandemic, you have to support them. (Interviewee 8)

During the pandemic, safety became the focal communication point and the number one priority for most tourism operators. Many operators made note of this shift in their messaging where storytelling had to be “safety first, experience second” (Interviewee 4).

Lessons Learned During the Pandemic

Despite differing experiences during the pandemic, many of the lessons shared by tourism operators either focused on relationships (take care of your teams, develop partnerships, have empathy) or strategy (be adaptive, focus on doing one thing well). Tourism operators shared lessons about the importance of taking care of taking care of teams (interviews 2, 6, 8, 10) through spending time and money on training (interview 6); being mindful of burnout and building in redundancy, breaks, healthy teams, succession planning, and mentorship (interviews 8); developing strong partnerships (interviews 2, 12, 15) to learn from and support others in the tourism community; showing empathy to customers (interviews 7,8,9) through kindness, tolerance and understanding (interview 9), and flexibility with cancellation and refund policies (interview 7).

The most frequently shared lessons were the importance of being adaptive (interviews 2, 5, 7, 12, 14, 10) and assessing business strategy (interviews 3, 8, 11, 14). The pandemic was a time of uncertainty where many operators did not know how to react to changing COVID-19 restrictions or how to plan ahead. Thus, the need for adaptability and flexibility were cited in the lessons they shared: adapt quickly and abandon quickly if the idea does not work out (interview 10, 12), flexibility is important as “what is true today may not be true tomorrow” (Interviewee 4), stay true to what you want to provide for guests and adapt that to your current circumstances (interview 5), and have scalable products and modular budgets so you can quickly identify what can be pulled back and what can be scaled up (interview 10). Operators also reported that taking the time to assess business strategy was critical during the pandemic (interviews 3, 8, 11, 14) and allowed for evaluating what worked well and dropping activities that were not providing value (interview 11), and focusing on doing one thing well instead of spreading too thin (interview 8).

Differentiating Experiences

The aspects that operators identified as their differentiators were intangible concepts focused on emotion, connection, and personal experience. This aligns with what Pine and Gilmore (1999) suggest make experiences memorable; distinctive, customized, engaging, and immersive elements. Tourism operators offered the following factors that differentiated their experiences: personalization (interviews 1, 5, 9, 12, 14), service and relationships (interview 12), authenticity allowing for cultural connection and engagement (interviews 2, 10), connection and making experiences magical (interview 8), surprise and novelty (interview 11), and taking care of people in a human way (interview 11).

Operators also shared that their memorable experiences made them stand out from the competition. Techniques for memorable experiences used by some operators included reiterating positive experiences through takeaways like photos (interview 4), storytelling and incorporating emotion (interview 7), providing education and information so visitors feel they have gained value from the experience (interview 14), and using novelty and surprise (interview 11). As one operator shared:

> The festival never remains static, it is unjuried and uncensored. It is about giving artists the resources and the platform they need to wow you, challenge you, make you laugh. There's an aliveness and spontaneity that exists when you put so many artists in one place at one time and watch them collide together with audiences. (Interviewee 8)

Industry Research

The effects of the COVID-19 pandemic on the tourism industry were unprecedented and deeply impacted tourism businesses globally. Health measures and distancing protocols changed frequently and varied in Canada interprovincially and within different sectors. As such, changing government policies and interpreting health recommendations were difficult to navigate for many tourism operators. During this time of not only operational uncertainty but uncertainty in terms of consumer comfort levels, it would have been beneficial to know what research and information were helpful to operators when deciding how to pivot their business. However, amongst the small sample of tourism operators that were interviewed, the majority did not find industry or market research helpful (interviews 1, 3, 10, 11, 12) because they did not find the research relevant for small operators (interviews 1, 3), reports were released too late when data was no longer useful (interview 10), or they were too busy to use research (interview 11, 12). Other operators either did their own research through social media or surveys (interviews 6, 8), looked at what others in the market were doing (interviews 4, 5, 7, 8, 10, 15), or found forecasts on visitation, comfort levels and spending useful (interviews 8, 10).

Discussion

As some operators found information on consumer visitation levels, behaviours, and purchase habits useful, this discussion focuses on the implications the study data trends might have for the tourism industry in Alberta. The COVID-19 pandemic was an unprecedented time of disruption for tourism and it is important to document operators' challenges, successes, and gaps in knowledge as the industry starts to rebuild. As many tourism businesses did not survive, gathering research and information from businesses that successfully navigated the pandemic may help to inform future tourism strategies and support the resiliency of Alberta's tourism experiences. The following discussion probes further into the trends seen in the three overarching themes of target markets, experience development and adaptation, and strategy.

Target Markets

The overall trend seen in Alberta's visitation markets was the prevalence of domestic visitors during the pandemic as travel restrictions limited international travel. Notable observations stemming from the results were an increase in overall post-pandemic visitation relative to pre-pandemic levels (interviews 5, 4, 7, 9, 13, 14) or a return similar to pre-pandemic visitation levels (interviews 2, 3, 4). As nine out of 15 interviewees reported strong post-pandemic visitation, this might indicate renewed demand for tourism experiences in Alberta. The success these operators are seeing, however, may not reflect what the broader Alberta tourism industry is experiencing. The tourism operators approached for this interview were selected from travel industry websites and were in operation post-pandemic. Thus, the businesses interviewed were those who had survived the pandemic and were willing to share their experiences. In this study's exploration of tourism experience adaptation, the perspectives and experiences of failed businesses were not considered. Consequently, not all tourism businesses in Alberta are experiencing the same levels of success as those interviewed.

Further to this, the interview results also show that tourism recovery has been unequal in Alberta. Different sectors and activities are seeing differing rates of visitation return. The tourism sectors that reported strong visitation returns were outdoor activities, tours, large festivals, and small accommodation providers. Some audiences may be more primed to return to certain activities because of costs, comfort levels, and perceived health risks associated with the activities. The hotels and small non-profits in this study reported that overall post-pandemic visitation levels were still low. Hotels in particular are not accessing the full visitation market.

With the slow return of international and corporate travel, hotels are still currently reliant on leisure markets for visitation and revenue generation.

Despite the relatively quick recovery for certain tourism products, operators had mixed opinions on how long it will take the Alberta tourism industry to recover to pre-pandemic visitation levels. External challenges were the most commonly cited factors slowing international regrowth including flight cancellations, reduced availability of direct international flights, increasing travel costs, airport delays, and industry staff shortages. One interview participant who lies at the intersection of both the tourism and arts community shared their reflections on challenges regrowing the workforce and the industry:

> […] regrowth for us can only happen at the speed of our industry[….] we've really started to think about how we regrow in a way that is kind, you know, making sure that we are considering the needs of our community that we are really considering how we come back in a way that brings everyone along with us [….] as we come out of COVID knowing how much burnout is impacting people knowing where comfortability is that that we are really building the resource and the redundancy to grow steadily and safely, right. (Interviewee 8)

This concern for how the tourism industry has treated its labour force and whether skilled workers are comfortable with returning to a potentially volatile industry will be major challenges to industry recovery. Supporting innovation in workforce development and upskilling existing workers is critical as the industry is faced with severe capacity shortages during a time of regrowth.

Experience Development and Adaptation

Consumer Behaviour and Preferences

In addition to considering labour shortages during industry regrowth, operators must stay informed of changing consumer behaviour and preferences. What visitors value and where they spend their time and money is changing in response to the lasting impact of COVID-19 (Destination Canada, 2021a). Post-pandemic, tourism operators reported that consumers are seeking outdoor experiences (interviews 1, 4, 5), wellness experiences (interviews 4, 6), family-focused activities (interviews 1, 5); staycations (interview 12), communal experiences (interviews 5, 9) and cultural offerings (interviews 2, 9, 10). Although the interview sample size for this research study was only 15 operators, these experience types aligned with those seen in Alberta tourism outlook reports indicating that shared experiences, emotional escape, and well-being remain key experience motivators in Alberta (Stone Olafson, 2022).

In addition to motivations, consumer comfort levels, risk tolerance, and behaviours have also shifted with changing COVID-19 conditions. At the time of writing, Alberta had lifted all pandemic-related travel and gathering restrictions. Although there is an eagerness to return to in-person experiences for some audiences, others are still dealing with the emotional and physical impacts of COVID-19 and remain cautious. These differing consumer comfort levels are important to note as they have implications for purchasing behaviour and experience expectations. For instance, consumer purchasing behaviours have shifted away from longer-term contracts and commitments toward more last-minute bookings and a desire for flexible cancellation policies. Tourism operators may have to rethink their experience design with a focus on customer empathy and differing safety needs, particularly when considering potentially heightened consumer anger and negativity as reported in interviews 4, 11, and 12. Sigala (2020) has suggested that experience design plays an important role in influencing customers' emotions, behaviors, attitudes, and evaluations. The presence of elements that suggest safety (for example hand sanitizer, a well-ventilated area, the smell of cleanliness, and relaxing music) will influence psychological comfort and perceived safety (Sigala, 2020). Thus, intentional and customer-centric experience design should be a key factor when tourism operators consider how to create experiences in a post-COVID-19 era.

The spectrum of differing consumer comfort levels poses a challenge to experience design in that tourism operators may have to balance the needs of cautious audiences with those who are ready to move on from COVID-19 and seek normality. In Diebner et al.'s (2020) insights into adapting customer experiences during COVID-19, they emphasize the need to show empathy and support when dealing with anxious customers. Particularly in times of crisis, a customer's interactions with a business will affect loyalty to that business (Diebner et al, 2020). As such, they suggest businesses can best meet the needs of their customers by using technology to enhance the customer experience. Technology should be used to seamlessly provide services, increase communications, enhance connections, and personalize experiences (Diebner et al, 2020). Businesses that successfully make this shift to digital and deliver superior experiences have an opportunity to strengthen post-pandemic customer relationships and loyalty (Diebner et al, 2020).

Experience Development

Diebner et al. (2020) suggested that technology is an important tool if businesses want to position themselves as customer experience leaders. In addition to the need for understanding shifting consumer behaviours, operators should also understand how their experience offerings can meet consumer needs. The study's main finding indicated that tourism operators only changed their experiences if their existing models were no longer operational. The majority of the operators interviewed kept their businesses running the same way during the pandemic with added COVID-19 safety measures (masking, social distancing), rather than developing new experiences. The overwhelming sentiment heard from tourism operators was a desire to go back to operating the same way as they had pre-pandemic, thus, showing the power of status quo bias. Status quo bias occurs when there is a preference for things to stay the same by doing nothing or by sticking to previously made decisions to avoid change (Samuelson, & Zeckhauser, 1988). Innovation and change can be difficult in the face of status quo bias, particularly for small businesses dealing with the added pressures of limited time, resources, and capacity for change. However, this desire to stay the same contradicts research in business management literature supporting the importance of adaptation and innovation. For instance, Traskevich and Fontanari's (2021) study on destination resiliency suggests that businesses must innovate instead of reacting if they want to emerge stronger post-pandemic. Tourism operators must think about change proactively as a way to prepare for future crises (Traskevich & Fontanari, 2021).

To develop proactive and resilient business strategies, tourism operators could look to small business adaptation literature such as Alonso et al.'s (2022) study on facilitating adaptation in small hospitality businesses. Their examination of how restaurants survived the 2008-2009 financial crisis found that businesses employing proactive strategies, rather than reactive cost-reducing strategies, improved their competitiveness during the economic downturn. The researchers suggested implementing a dynamic capabilities framework based on three adaptive measures: sensing (recognizing opportunities and threats), seizing (taking action to create new business avenues or minimize losses), and transforming-reconfiguring (the process of continuous renewal to embrace changing best practices and depart from conventional ways of thinking) (Alonso et al., 2022). The dynamic capabilities framework could be an important business strategy that even small tourism operators could use to mitigate future disruptions to the tourism industry.

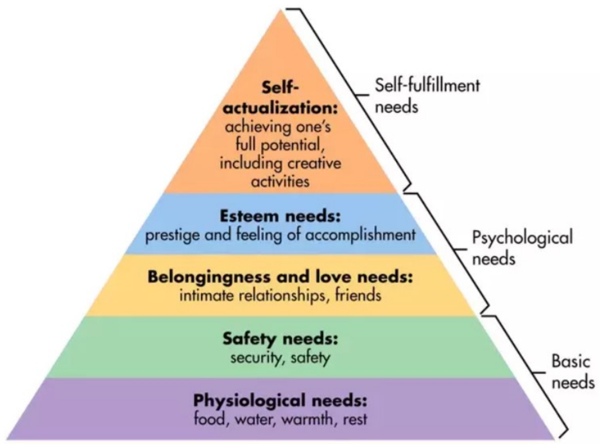
Adaptations

The experience adaptations previously shared were logistical changes complying with COVID-19 safety measures rather than experiential enhancements such as memorability, immersiveness, co-creation, and storytelling. As the COVID-19 pandemic disrupted tourism operators' revenues, employment levels, and visitation, most businesses were focused on navigating changing COVID-19 restrictions and surviving the crisis. A top priority for operators was also to keep customers safe.

This focus on the safety of experiences contrasts with pre-pandemic tourism experiences which focused on self-actualization and meeting consumer needs for creativity and self-fulfillment. Self-actualization is at the top of Maslow's hierarchy of needs representing the highest order of motivation driving us to reach our full potential (Maslow, 1943 as cited in McLeod, 2022). Maslow proposed that higher-order needs generally will not be pursued until lower needs are met (Maslow, 1943 as cited in McLeod, 2022). If the hierarchy of needs theory is applied to the pandemic, COVID-19 brought consumer needs back down to basic levels of physical safety (protection against illness) and psychological safety (comfort, security). This may suggest that focusing on safety measures was the most important strategy for operators during the pandemic rather than innovating to meet self-actualization needs.

However, in a post-pandemic era, global consumer reports have found that people want to once again make consumption choices based on aspiration rather than necessity; they want to stop reacting to events and start creating the self-actualized life they want (Rogers, 2021). Even though the pandemic may not have been a time to implement experience economy strategies, the experience landscape is shifting back towards fulfilling higher-order motivations. With shifting consumer needs in mind, experiential tactics and experience economy knowledge will re-emerge as important consumer engagement strategies.

Figure 1 Maslow's Hierarchy of Needs



(Maslow, 1943 as cited in McLeod, 2022)

Further supporting the need to rethink experience development strategies, one tourism operator offered the interesting insight that developing new experiences post-pandemic is more difficult than it was during the pandemic. According to Interviewee 11, it was easier to know what types of experiences people wanted during COVID-19 because of social distancing and lockdowns. People wanted to be social and have a connection with others; they wanted to leave their places of isolation for novel, unique and exciting experiences; and they wanted to be active outdoors as a remedy for being locked in their homes. However, customers wanted to do this safely with minimal threat of contracting COVID-19. In response to what people were missing during the pandemic, Interviewee 11 created higher-end, outdoor dining experiences for cohorts.

Now that COVID-19 restrictions have been lifted and greater competition exists with the opening of restaurants, festivals and attractions, this operator shared that they are now unsure of how to capture consumer attention:

> COVID was fairly easy, in terms of, you know, what's been taken away from people in COVID. You know, what they don't get to have that they used to have, they don't get to go to restaurants, they don't get to be together safely. So that was fairly easy. It was a bit of a gimme, you know […] but we're out of COVID now, and [….] the question I don't know the answer to, what do people want now? What are they missing now? And it's not quite as apparent and that's where research might be very helpful to us. (Interviewee 11)

This uncertainty around post-pandemic consumer needs and how to create experiences to meet those needs was echoed by several operators. As the tourism industry emerges from a long period of constraints, some predict that travel trends will be about the quality of rich and meaningful experiences for consumers, rather than quantity (Expedia, 2021).

Experience Trends and Innovations

When asked about experiential trends and innovations, the accelerated use of technology and digitalization emerged as an important innovation resulting from the pandemic. Technology facilitated customer experience improvements such as staggered check-ins (interview 5), online bookings (interview 4), improved audience accessibility (interview 8), connection to a broader audience (interviews 4,8), and online staff training (interview 8). The use of virtual technologies also provided opportunities for broader cultural expression for some operators through new digital mediums such as pre-recorded videos and soundscapes (interview 2).

Although technology afforded opportunities for improved visitor experience, connection, and, engagement, it also posed challenges for some operators that struggled with the time or knowledge to implement digital strategies. One operator mentioned hosting hybrid events and embracing technology as their biggest innovations, however, also said that virtual experiences took too long to develop and required a lot of planning and resources (interview 12). This operator reported that they never fully developed the potential for doing business differently because it was exceptionally hard for the hospitality industry to not have personal connections and face-to-face interaction. This operator stopped offering virtual and hybrid experiences once COVID–19 restrictions were lifted and the business reverted back to its “normal” way of operating (interview 12).

Furthermore, not all tourism operators attempted to incorporate digital tactics. Festivals, hotels, and attractions with educational programs developed online events and programs. In contrast, tour operators, activity-based businesses, rural and small accommodation providers, and small non-profit activity centres did not develop virtual programs. The operators that did not implement digital strategies found that these strategies were either ineffective for their target market or they did not have the capacity or knowledge to develop digital tactics. While there may be advantages to innovating during a crisis, innovation may be unappealing or inaccessible if businesses lack the time, skills, knowledge, budget, and staff resources needed. Unsurprisingly, many tourism operators did not have the capacity to implement innovations during COVID-19. As previously discussed with the proclivity toward status quo bias, the desire to go back to the way things were pre-COVID-19 could have also impacted a willingness to ideate and innovate.

Experience Economy

A key focus of this study was on tourism experience delivery and design and the use of experience economy concepts by tourism operators. Researchers such as Kaur and Kaur (2020) posited that the pandemic reiterated the need for Pine and Gilmore's experience economy lessons. Businesses should understand how to create experiences that are robust enough to survive plunges in the market, personalized enough to demand a price tag, and differentiated enough to stand out from the competition (Kaur & Kaur, 2020). At the same time, experience economy knowledge and product innovation may not be relevant to all tourism operators, particularly during a time of crisis. Some of the operators interviewed did not feel the need to change or innovate. For instance, a small remote business with little competition reported that it had no desire for more customers or new product offerings (interview 1).

Moreover, the definition of what constitutes a "transformation" or an "innovation "is unclear, especially for small businesses that may have made small operational or experiential changes compared to larger operators. In Price et al.'s (2022) study of how small tourism businesses talk about COVID-19, they found that small businesses did not share a progress-driven approach to business change, there was no evidence of a radical new normal for them as COVID-19 was not perceived as a crisis. Similarly, the operator interviewed in this study also opposed business change and reverted back to normal operations despite an industry crisis. Larger operators with better funding, better industry networks, and more staff and resources reported innovating and adapting more than smaller operators. In this case, we need to ask "what is the relevance of business opportunity, transformation, and innovation for small operators focused on the everyday operational challenges of running a tourism business?" Some of the operators interviewed reported utilizing more of an improvisational strategy to experience development where consumer research was not used and experiences were developed based on a gut feeling of what people wanted rather than a process for developing a new experiential tourism product. This lack of a formalized strategy wasn't necessarily an inferior strategy for small businesses, but rather a practical, alternative way of navigating the pandemic.

The more common narrative seen in pandemic crisis management, however, is the need for innovation and adaptation. Striving for innovation aligns with the experience economy theory where continually improving, personalizing, and adding more value to experiences is the key to competitive differentiation. As some researchers have criticized the tourism sector for the exchangeability of products that can be found in almost every destination (Traskevich & Fontanari, 2021), experience economy knowledge may be important for the creation of differentiated and compelling high-value experiences.

Co-creation can also be a strategy that adds specific value to the individual consumer, particularly toward the personal, social, and cultural values that the individual holds (Binkhorst & Dekker, 2009; Prahalad & Ramaswamy, 2004). Co-creation is the process through which customers interact with a business to generate their own meaningful experience (Binkhorst & Dekker, 2009). It was cited as an important experience development concept in the literature review, although there was little discussion of this strategy during the interviews indicating there may be a gap in co-creation knowledge. Co-creation was a strategy that was discussed by only two tourism operators. One operator discussed co-creation in the context of collaborating with partners to co-develop experiences (interview 2). The second tourism operator discussed co-creation in reference to flexible tour itineraries as set itineraries that are shaped by the needs and interests of visitors (interview 9).

In addition to minimal references to co-creation, experience economy tactics were only discussed broadly by the operators. Elements of personalization (interviews 1, 5, 9, 12, 14);

customization (personal shopping and concierge services in interview 15); memorability, connection, authenticity (interviews 2 ,8, 10); novelty and surprise (interviews 4, 8); the importance of understanding needs and motivations (interview 11); and storytelling to enhance connection (interview 2, 8) were mentioned in the interviews. The operators made little reference to how these experiential tactics were used in their experience development strategies. Once again, the lack of discussion may indicate limited knowledge in these areas. However, three of the 15 interviewees had attended experience development workshops offered by Travel Alberta and had training in experience economy concepts. Thus, experiential strategies may not have been discussed in detail because they were not relevant during pandemic experience planning, rather than not known about.

Strategy

Marketing

Similar to the aforementioned experience development concepts, the importance of storytelling was acknowledged by the operators but very few commented on how it was used as a strategy or which tactics made storytelling successful. Marketing messages were predominantly used to address how operators were complying with COVID-19 protocols and keeping customers safe. As noted in the aforementioned hierarchy of needs discussion, storytelling became a reflection of basic consumer safety needs at the time. Partnership marketing, or collaborative marketing, was also mentioned as an important marketing tactic. Many operators forged stronger industry partnerships during the pandemic and banded together on a “collective tourism strategy” to cross-promote other operators, thereby creating a stronger overall destination message with multiple experience offerings (interview 10). By cross-promoting each other in marketing, Interviewee 15 worked with other tourism partners in Alberta to showcase the diversity of Alberta's destination offerings to entice international traveller visitation.

Lessons Learned

In addition to the need for strong partnerships, a prevalent theme reiterated by several operators was the importance of taking care of employees. As almost every interview noted the importance of staff, taking care of employees should have been a top strategic priority before the pandemic. Despite being an important driver of job creation, the tourism sector has been criticized for excessively long working hours, low wages, high turnover rate, lack of social protection, inconsistent seasonal or part-time work, and limited career opportunities (International Labour Organization, 2022). These workplace challenges, coupled with the fact that many tourism employees found work in other sectors during the pandemic, could mean tourism labour shortages will continue to be challenging over the next few years of tourism recovery. Thus, taking better care of employees is an important lesson to the industry necessitating innovation in workforce development to recruit, train, and retain staff across all tourism sectors.

Differentiation

In addition to labour shortages, differentiation is also a challenge for tourism operators competing with other destinations globally. If customization and personalization provide consumer value by serving individual needs uniquely and enhancing experience satisfaction, these strategies are key to differentiation from the competition (Pine & Gilmore, 1999). When asked how will experiences be differentiated, the most common response given by operators was that personalization makes their business stand out from others. Good personalization, however, starts with good data. Accessing the right data to inform personalization is still a challenge for many tourism operators who rely upon direct customer feedback and a “gut feeling” when developing their experiences. A strong personalization strategy should rely on a mix of consumer feedback, observation by the tourism operator, company websites, social media activity, and third-party data from outside sources such as industry reports and consumer search behaviour (Skift, 2018). Although technology can not replace the connection established by human interaction, it should be used to enhance the consumer experience.

Industry Research

The importance of industry partnerships and collaboration was a strong theme seen in many of the interviews. As many operators did not find industry research helpful, they looked to other businesses as a way to gather information on what was happening in other markets, which experience adaptations were working, and what recovery might look like in faster-moving markets. Although being a late adopter allows a business to learn from the lessons of others, it also presents the question of how much innovation might have been stalled as operators waited to see what others were doing. And is this “wait and see” method opposing the lessons imparted during the pandemic of adaptation and innovation? One smaller operator wanted destination management organizations, like Travel Alberta, to help by sharing their social media content and amplifying their messages rather than providing social media workshops (interview 3). When asked what type of research they would like to see, operators wanted more industry recovery forecasts (interviews 1, 2, 4, 14); reports on consumer trends, comfort levels, motivations, and expectations (interview 2); information on how other markets have succeeded through the pandemic (interview 4); where other tourism markets are seeing the greatest returns on investment (interview 14); and how consumers are making purchase decisions (interview 11).

Some operators also wanted more information on how to use digital tools (interview 5) and how to build an online experience (interview 9).

As the industry looked to their own community for support, ideas, and help navigating COVID-19 restrictions, this shows the importance of collective knowledge during a time of crisis. Unfortunately, not all operators have strong tourism community networks, which begs the questions: “Would tourism businesses have fared better if there was a better way to connect the community, consolidate knowledge, ask questions and get answers from each other?” “If research was not helpful to tourism operators, how do we fill this gap?” and “Would an online community, portal, or forum have helped support the industry?”

Study Limitations

While this paper documents a number of novel insights from Alberta-based tourism operators during the COVID-19 pandemic and suggests practical implications for tourism providers, study limitations must also be noted. The interview sample size was small and non-randomized so the results can not be generalizable to the broader Alberta tourism industry. It is very likely that a different group of tourism operators would have had different experiences, perceptions, and opinions and would have answered in very different ways. Although this study’s aim was to understand the subjective experiences of a small subset of Alberta tourism operators, extending similar research to a larger sample size would provide interesting insight into how Alberta tourism businesses survived the pandemic and what research might help them rebuild and thrive in future years.

Although this study elicited interesting insights from individual tourism operators, the study was also limited by time and resources. There is a limited amount and depth of information that can be gathered in a 30 to 60-minute interview period. The majority of the eight interview questions also had one to three prompt questions should further detail or discussion be needed. Not all prompt questions were asked in each interview due to limited interview time contributing to differing levels of response detail. Follow-up interviews and interviews with a broader range of tourism operators would have contributed to the depth of knowledge obtained.

Furthermore, some of the answers received to the interview questions were similar. For instance, interview participants responded similarly to the questions of what kinds of experiences are consumers now seeking (interview question 2), what has been successful in the experiences that you're offering (interview question 3) and how will you differentiate your experiences (interview question 7). The answers shared provide a similar emphasis that consumers are seeking personalization, authenticity, and connection. This may have resulted from the way the questions were worded by the researcher. Alternatively, similar answers may have been given because tourism operators believe what consumers want, what they are offering, and what makes them different are the same things. A lack of diversity in answers was also observed for responses related to storytelling tactics, which also could have occurred because of the way the question was worded or asked. The question may have been too general and further detail could have focused on what makes a good story such as "How did you create a story authentic to your business?" "How do you communicate your story in an authentic and effective way?" "How do you use storytelling to engage your current audiences and attract new audiences?" and "How does your story manifest itself in your experiences?"

A further limitation of the study is the potential for researcher bias and making inferences about the data that is not objective. As a reflective researcher, I must acknowledge how my own experiences and opinions may have informed my observations, albeit unintentionally. Research is never truly neutral or objective, particularly in interpretive studies where the researcher is immersed in the data interpretation (Guba & Lincoln, 1994). My hope is that passion for the research and the experience of the research participants led to greater insight into the data without extensively influencing interpretation.

Implications and Further Research

The purpose of this study was not to provide tourism program or policy recommendations but to better understand the experience of Alberta's tourism operators during the COVID-19 pandemic and the impact the pandemic had on tourism markets, experiences, and consumer behaviours. An assessment of these collective perceptions, experiences, and opinions did bring forward some important insights into the future of Alberta's tourism industry as it seeks to rebuild. As I learned more about the subjective experiences of the 15 tourism operators I interviewed, some of the most interesting insights I felt were the questions this study brought up for further research.

Each of the eight interview questions investigated brings forward additional considerations and implications for the tourism industry. Further areas for discussion and research could be:

- How long will pent-up travel demand last and how will the industry manage demand with ongoing labour shortages?
- What types of experiences will consumers want now as we continue to emerge from the pandemic?
- How can we improve the imparting of experience development knowledge to tourism operators particularly when the roles of destination management organizations are shifting?
- What will the experiential trends and innovations be as we move into a post-COVID-19 period for travel?

- As we shift our messages away from safety, cleanliness, and COVID-19 measures, what are the stories we should be telling our consumers now?
- How do we ensure the tourism industry does not lose sight of the lessons learned during the pandemic?
- Is now the time to focus on differentiation and memorable experiences when many businesses are still rebuilding staff, revenue, and resources?
- If industry research was not helpful for tourism operators during the pandemic, how can the industry be better supported with knowledge and resources now?

In addition to a call for more research into the needs of tourism operators, consumers, and the labour market, the findings from this study bring forward important considerations for Alberta's future destination development strategy and suggests the following six areas for further development:

1) Many tourism operators in Alberta are still experiencing strong domestic and regional tourism indicating a need to continue developing strategies to maximize domestic and regional visitation
2) The Alberta tourism industry should support operators to further develop experience-based capabilities and knowledge. If Alberta is to become a competitive tourism destination, the industry needs to be able to adapt experience offerings to respond to changing consumer demands
3) The way industry research is being communicated lacks diversity and appears to be either not useful or accessible to the majority of operators. Destination management organizations should re-evaluate how to best serve operators and re-evaluate not only what industry information is needed but *how* information should be shared

4) Partnerships and collaboration were important to Alberta's tourism industry during a period of crisis. However, there is a lack of connection and collaborative opportunities between operators and destination management organizations, particularly for small operators. There is a need to further develop this sense of community and collective knowledge in Alberta's tourism industry
5) Alberta tourism operators have a strong desire to revert back to their pre-pandemic ways of operating. It is important for destination management organizations to recognize this propensity and support operators with developing skills in proactive business adaptation and change management strategies
6) Technology has the potential to help operators better respond to market demand and consumer needs and enhance personalization strategies. There is a need for the industry to explore how to support the adoption of technology by Alberta tourism operators

The future of Alberta's tourism regrowth may depend on understanding these questions and ensuring we learn from the lessons imparted during one of the tourism industry's greatest challenges in recent history. If destinations are to remain resilient in the face of future industry challenges, there is a need to think proactively about change and develop the knowledge and skills needed for a resilient and adaptive tourism industry.

Conclusion

The purpose of this study was to explore key concepts in tourism experience development from the perspective of tourism operators and gather knowledge on how tourism experiences in Alberta have evolved during the COVID-19 pandemic. The need for understanding and adapting experiences has never been more pressing as the tourism industry seeks to recover and rebuild following more than two years of travel restrictions. By building experience development knowledge, tourism providers are better positioned to respond to market demand and create experiences that attract more visitors, generate more revenue, and strengthen the recovery of the province's economy and provincial brand. This study looked at how three core areas have been affected by the pandemic: tourism markets, experiences, and consumer behaviour. The study's findings showed that target markets shifted heavily to domestic travellers during the pandemic; the acceleration of technology was a driver of innovation leading to improved visitor experiences; experiential trends were extensions of what was seen pre-pandemic; and consumer behaviour changes showed both travel and purchasing hesitancy and pent-up travel demand.

Further to the aforementioned changes in markets, experiences and consumer behaviour, this study contributed knowledge to the Alberta tourism industry through the insights garnered in the interviews. The most striking questions elicited in this study were: "How do we meet differing consumer needs when there is a dichotomy in comfort levels?" "How do we take care of the people in the tourism industry and bring back skilled labour to retain the integrity of highly personalized experiences?" "How do we support technological innovation and build adaptive strategies for the tourism industry during a time of minimal staff, budgets and resources?" "If industry research is not helpful to tourism operators, what is?"

Furthermore, the pandemic brought about a time when operators struggled to keep their businesses afloat. During this time, experiences were pivoted away from meeting self-actualization needs towards meeting basic safety needs. Thus, knowledge of experience development concepts may have stalled during the pandemic; however, the question overwhelmingly on tourism operators' minds is "What do people want from their experiences now?" As we enter a time of regrowth for in Alberta, the tourism industry is ripe for engaging and compelling experiences that strengthen the visitor economy and inspire the world to visit Alberta. The question we must ask ourselves is how do we best support the industry in developing memorable Canadian experiences?

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