The Opportunity Cost of Being Invisible

WHY VISITOR DISCOVERY AND CONNECTIVITY ARE LOCAL ECONOMIC INFRASTRUCTURE

A practical framework for turning visitor discovery into wider local value, while balancing economic opportunity with capacity, resident priorities and responsible destination management.

The question at the centre

How much local value is lost when visitors can't discover the full community, and how can better connectivity expand that value without creating unmanaged pressure?

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Executive Summary

Communities don't become economically stronger through tourism simply because people arrive. Value is created when visitors can discover the community, find reasons to stay, move confidently between local businesses and experiences, spend across the wider local economy, and leave behind enough value to support jobs, public revenue, infrastructure and future investment.

This white paper makes a simple argument: visibility and connectivity are economic infrastructure. A community can't capture value from a visitor who never discovers it, and it captures far less from a visitor who finds only one attraction, struggles to plan the rest of the trip, and leaves before the wider community becomes visible.

The central proposition

Discovery creates the visit. Connectivity increases the value of the visit. Managed discoverability helps distribute that value across more businesses, places, seasons and communities.

Canada's visitor economy already operates on a massive scale. In 2024, tourism generated about $130 billion in direct visitor spending, contributed $41.0 billion to GDP, supported 702,700 jobs and included more than 265,800 tourism-industry businesses. Tourism also generated $32.7 billion in government revenue. [2, 3, 5]

Those national figures matter, but the local question is more useful: how much visitor value is a community failing to capture because its experiences, events, accommodations, trails, restaurants and small businesses are fragmented or hard to find?

The answer isn't to pursue maximum volume. Unmanaged tourism can strain roads, public transport, waste systems, housing, natural areas and residents' patience. **The stronger model is value-led tourism:** attract appropriate visitors, help them discover more relevant options, disperse them across time and space, respect capacity, and reinvest a meaningful share of the resulting public and private value into the infrastructure that makes both visiting and living in the community better. [9, 10, 11]

Key findings

Visitors are one of the three central audiences in regional attractiveness, alongside investors and talent. [1]

Overnight domestic visits generated roughly 4.4 times the spending of same-day visits across the second, third and fourth quarters of 2025. [6, 7, 8]

Concentrated tourism creates avoidable pressure. OECD guidance supports spreading visitor flows to prepared areas, extending demand into shoulder periods and investing in shared infrastructure. [9, 10]

Better discoverability doesn't have to turn every hidden gem into the next crowded hotspot. Personalised discovery can match different visitors with different places, times and experiences, provided capacity and community priorities are built into the system.

Tourism's local value depends on capture and circulation. Revenue leakage, external ownership and concentration among a few large firms can reduce the benefit that reaches residents and local services. [10]

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1. The Local Growth Equation

There are many ways to strengthen a local economy, including productivity growth, business formation, exports, investment, workforce development and population growth. **At the community level, however, two highly visible routes bring new demand into a place:** attracting people and businesses to locate there, and attracting visitors to spend there.

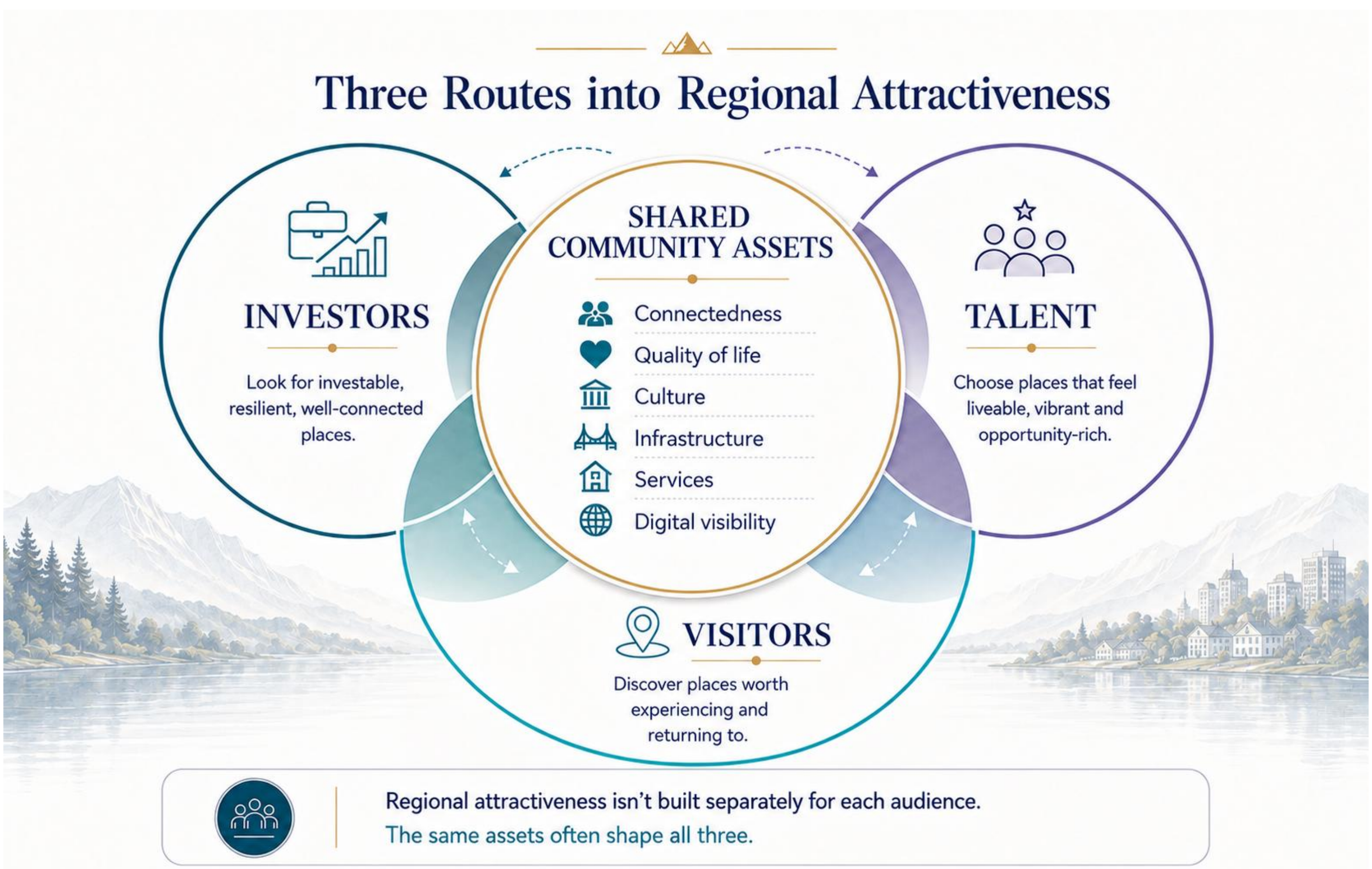
The first route is familiar. Communities compete for employers, entrepreneurs, investment and residents. New jobs can bring new households, increase the tax base and support local demand. The process is important, but it's often slow and constrained by housing, labour supply, infrastructure, financing and the availability of suitable employment.

The visitor economy offers a second route. It brings outside spending into the community without requiring the spender to relocate. A visitor can discover a place today, travel next month and support an accommodation, restaurant, event, attraction, retailer and service provider during a single trip.

The OECD's regional attractiveness framework treats investors, talent and visitors as three key target groups. That matters because it places tourism inside economic development, rather than beside it as a separate promotional activity.[1]

An overlooked economic development channel

The visitor economy brings outside spending into a community, supporting local businesses, jobs, public revenue and the amenities that make it a better place to live and visit.



2. Tourism as Imported Demand

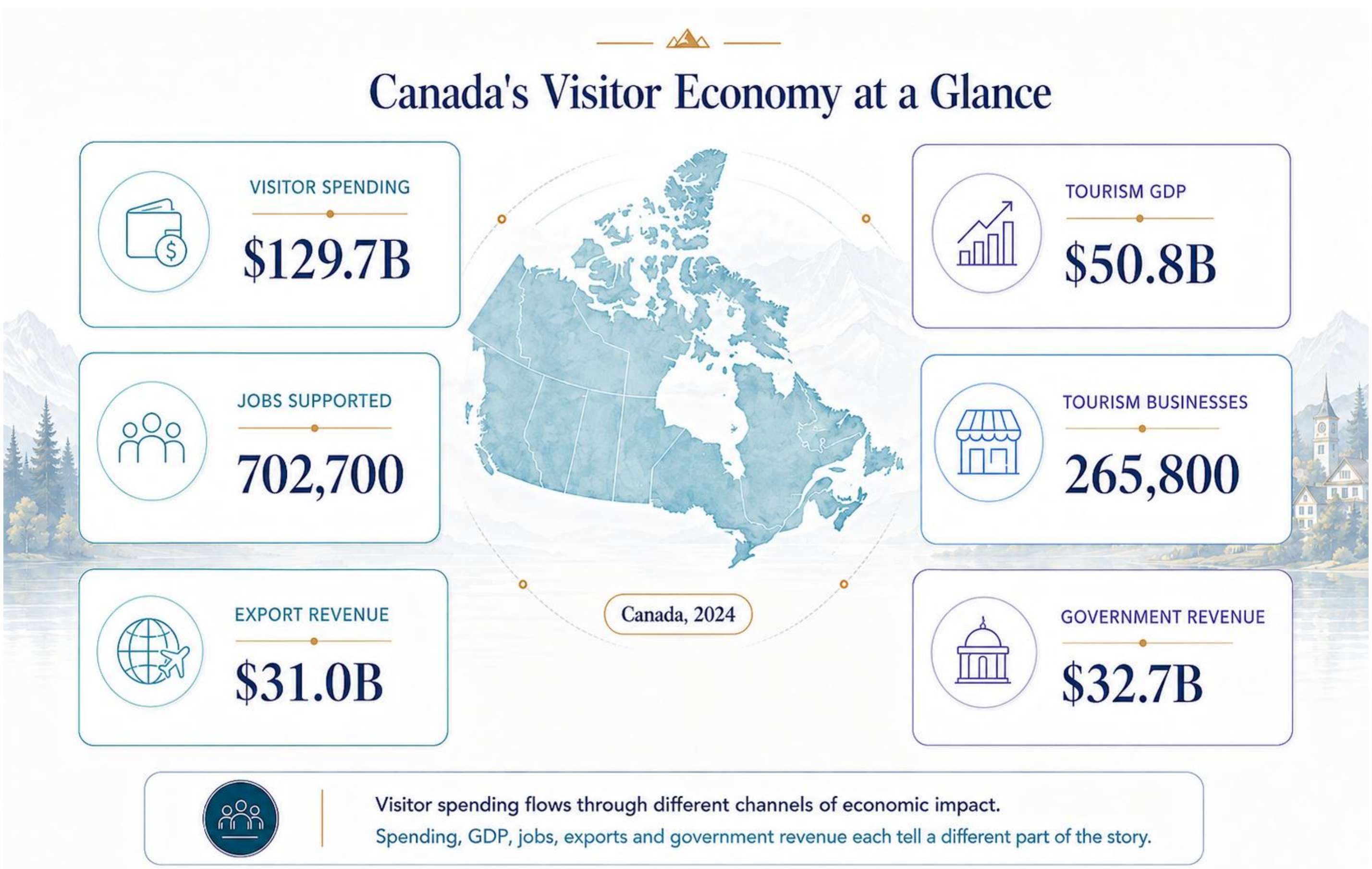
Tourism behaves like an export at two levels. International visitors bring new money into Canada. Domestic visitors also transfer spending from their home region into the community they visit. That spending reaches far beyond hotels and attractions. It flows through transportation, food and beverage, recreation, retail, events, fuel, services and local supply chains.

Tourism's 2024 GDP growth of 3.6% outpaced Canada's overall economic growth of 1.7%. The sector's demand also surpassed its 2019 level for the first time in the current data series.[3]

However, visitor spending doesn't automatically translate into local prosperity. The impact depends on who owns the businesses, who's employed, where supplies are purchased, which booking channels are used and how widely visitors spend across the community. Communities capture more value when that spending reaches more local businesses and continues circulating locally.

Why imported demand matters

Visitor spending brings new money into a community, where it can support local businesses, employment, public revenue and further investment. The more widely that spending circulates locally, the greater its economic value.



3. From Visibility to Community Value

The economic chain begins before the visitor arrives. It begins when a place, event, experience or business becomes visible enough to enter consideration. The infographic below maps the progression from discovery to a stronger local economy and, ultimately, a better quality of life for residents and visitors.

3.1 How the Cycle Works

A single act of discovery can create multiple layers of value when the wider community is connected. A visitor may arrive for an event, stay overnight, dine locally, explore nearby attractions and spend with several businesses along the way. Each additional connection gives the community another opportunity to extend the visit, distribute spending and turn one decision into broader economic impact.

Stage	Value created	What it means
1	Visibility	A visitor discovers the community and has enough information to consider it.
2	Reason to visit	Events, culture, nature, attractions and experiences convert awareness into intent.
3	Local participation	Dining, shopping, recreation and services distribute spending beyond a single anchor attraction.
4	Longer stay	Accommodation and a fuller itinerary extend time in the community and expand the spending window.
5	Business value	Revenue supports local businesses, wages, suppliers, entrepreneurship and future investment.
6	Public value	Taxes and fees contribute to public revenue, while private investment supports facilities and services.
7	Community value	Better amenities, infrastructure and economic stability improve quality of life and future attractiveness.

The same cycle works in reverse. When experiences are difficult to find, fewer visitors choose the community in the first place. When information is fragmented, those who do arrive are more likely to stay for less time, visit fewer places and concentrate their spending around the small number of options that are easiest to discover. That leaves much of the community's existing capacity outside the visitor journey.

The opportunity cost reaches far beyond a missed booking. It includes the meal that wasn't purchased, the room that remained empty, the shop that wasn't visited, the employee hours that weren't needed, the tax revenue that wasn't generated and the future investment that wasn't supported. Over time, repeated gaps in discovery reduce the amount of visitor demand that reaches local businesses and weaken the cycle through which tourism contributes to infrastructure, amenities and quality of life.

Better connectivity helps more of the community participate. When visitors can easily understand what's available, how experiences fit together and what suits their particular interests, they're more likely to build fuller itineraries and move beyond the same handful of highly visible attractions.

This spreads attention and spending across a wider range of businesses, neighbourhoods and experiences, while helping communities make better use of the assets they already have.

The cost of a disconnected visitor journey

When experiences are difficult to find or plan together, visitors make shorter trips, reach fewer businesses and concentrate their spending around the options they can easily see. Better connectivity helps more of the community participate in the economic value of each visit.

4. The Compounding Effect of Invisible Inventory

A community can have exceptional tourism assets and still underperform if those assets are difficult to discover, understand or combine into a trip. Invisibility appears in several forms: outdated websites, incomplete event information, unclaimed business profiles, disconnected calendars, unclear booking paths, inconsistent hours, weak accessibility information, poor mapping and content that search engines or AI systems can't interpret confidently.

The cost compounds across the visitor journey. A missed experience can mean a shorter itinerary. A shorter itinerary can remove the need for an overnight stay. The missing overnight stay can remove several meals, retail purchases and additional activities. A single visibility gap can therefore affect multiple businesses that never see the visitor at all.

The discovery environment is also changing. Fewer than one-third of travellers in a 2026 McKinsey analysis had used generative AI for travel tasks, but 84% of those users said it improved their experience. The most common uses were general research, inspiration, local food recommendations, transport planning and itinerary creation. [14]

Major travel platforms are responding by embedding natural-language planning, personalised comparison and bookable itineraries directly into their products. This doesn't make regional websites or operator content less important though, it raises the value of accurate, structured and connected information because AI systems can only surface what they can reliably understand. [15]

5. The Long-Tail Opportunity

A common criticism of promoting 'hidden gems' is that visibility will simply overcrowd them. That can happen when a sensitive place is promoted indiscriminately, without capacity information, timing guidance or local governance. It doesn't follow, however, that better discovery must send everyone to the same hidden place.

Each visitor is looking for a different version of a destination. One person wants a quiet accessible trail. Another wants a late-night music event. A family wants an indoor activity near their accommodation. A business traveller wants a local supper within a short walk. A cyclist wants a route, repair stop and café. The community's lesser-known assets are not one interchangeable category. They form a long tail of distinct experiences, each relevant to different people under different conditions.

When only the headline attractions are easy to find, visitor choice is artificially narrow. A destination with hundreds of experiences can still feel like it has twenty things to do because the rest require insider knowledge, scattered searches or luck. Personalised discovery can widen the set of relevant options instead of broadcasting one generic list to everyone.

The system still needs guardrails. Sensitive sites may require visitor limits, seasonal closures, permit rules or deliberate exclusion from broad promotion. Businesses and communities should be able to signal capacity, operating windows, accessibility, suitability and desired visitor types. Managed discovery is a distribution tool, not a licence to expose every place to unlimited demand.

6. Longer Stays and Wider Spend

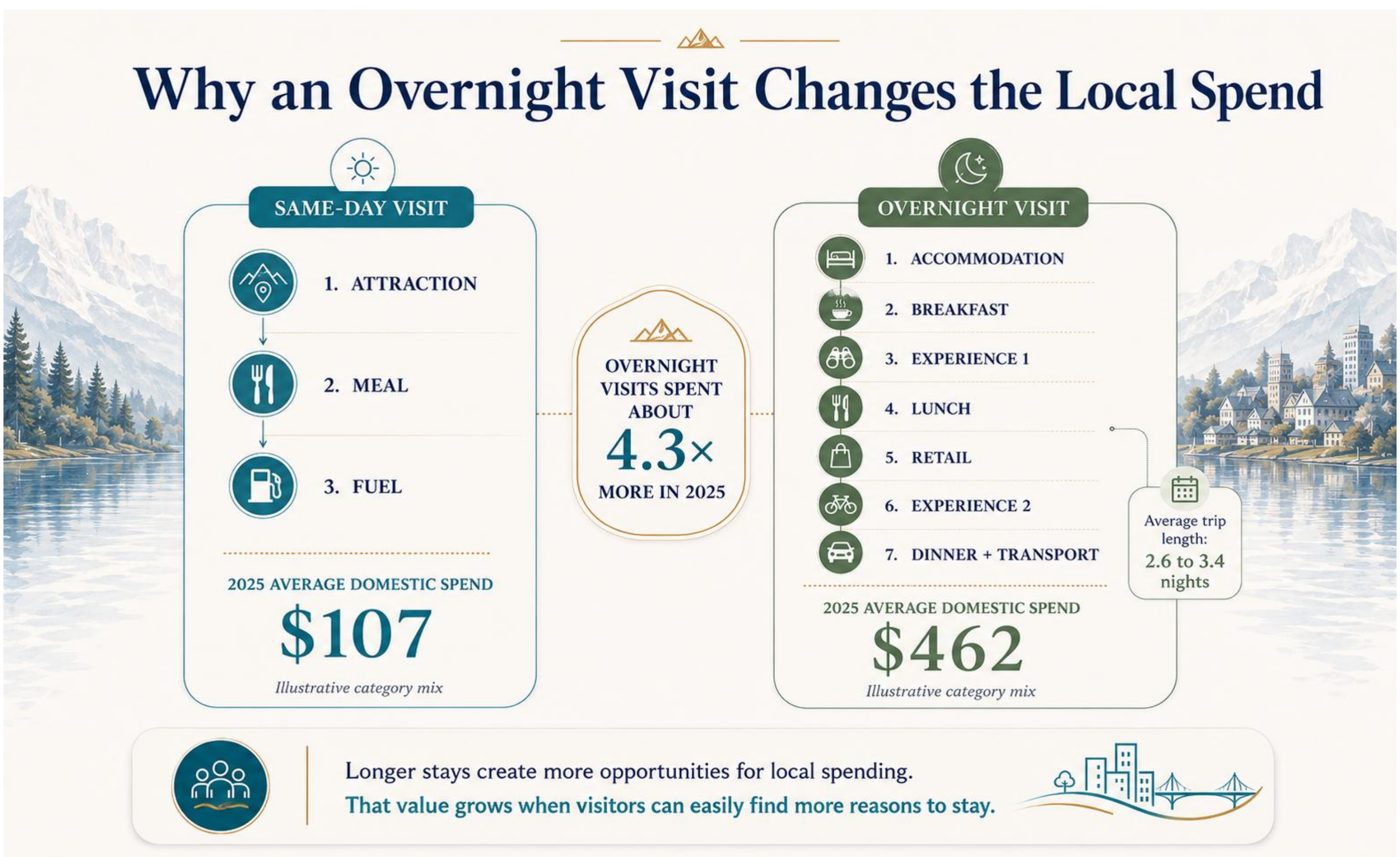
Length of stay is one of the clearest links between discovery and local economic value. A same-day visitor has a limited spending window, while an overnight visitor is more likely to purchase accommodation, multiple meals, transport, retail, entertainment and additional experiences.

Period	Average same-day domestic spend	Average overnight domestic spend	Overnight multiple
Q1 2025	$108	$425	3.9x
Q2 2025	$101	$449	4.4x
Q3 2025	$116	$513	4.4x
Q4 2025	$103	$462	4.5x

Across all four quarters of 2025, the average overnight domestic visit generated roughly 4.3 times the spending of a same-day visit. Average trip length ranged from 2.6 to 3.4 nights. [6, 7, 8, 9]

Day visitors remain highly valuable, particularly for events, attractions, retail districts and communities near major population centres. Better discoverability gives visitors a clearer view of the reasons to extend their trip when those reasons genuinely exist.

A connected itinerary matters because no single operator usually creates the entire stay. The accommodation benefits from the event. The restaurant benefits from the trail. The shop benefits from the festival. The community captures more value when those pieces are visible together and visitors can move from one to the next with confidence.



7. When Tourism isn't Managed Well

Tourism can strengthen a community, but unmanaged growth can also make a place harder to live in. Pressure is often concentrated in the same streets, parks, trails, waterfronts and neighbourhoods that residents use every day. When infrastructure and governance don't keep pace, the economic benefits can be overshadowed by congestion, waste, environmental degradation, housing pressure, seasonal overload and resentment.

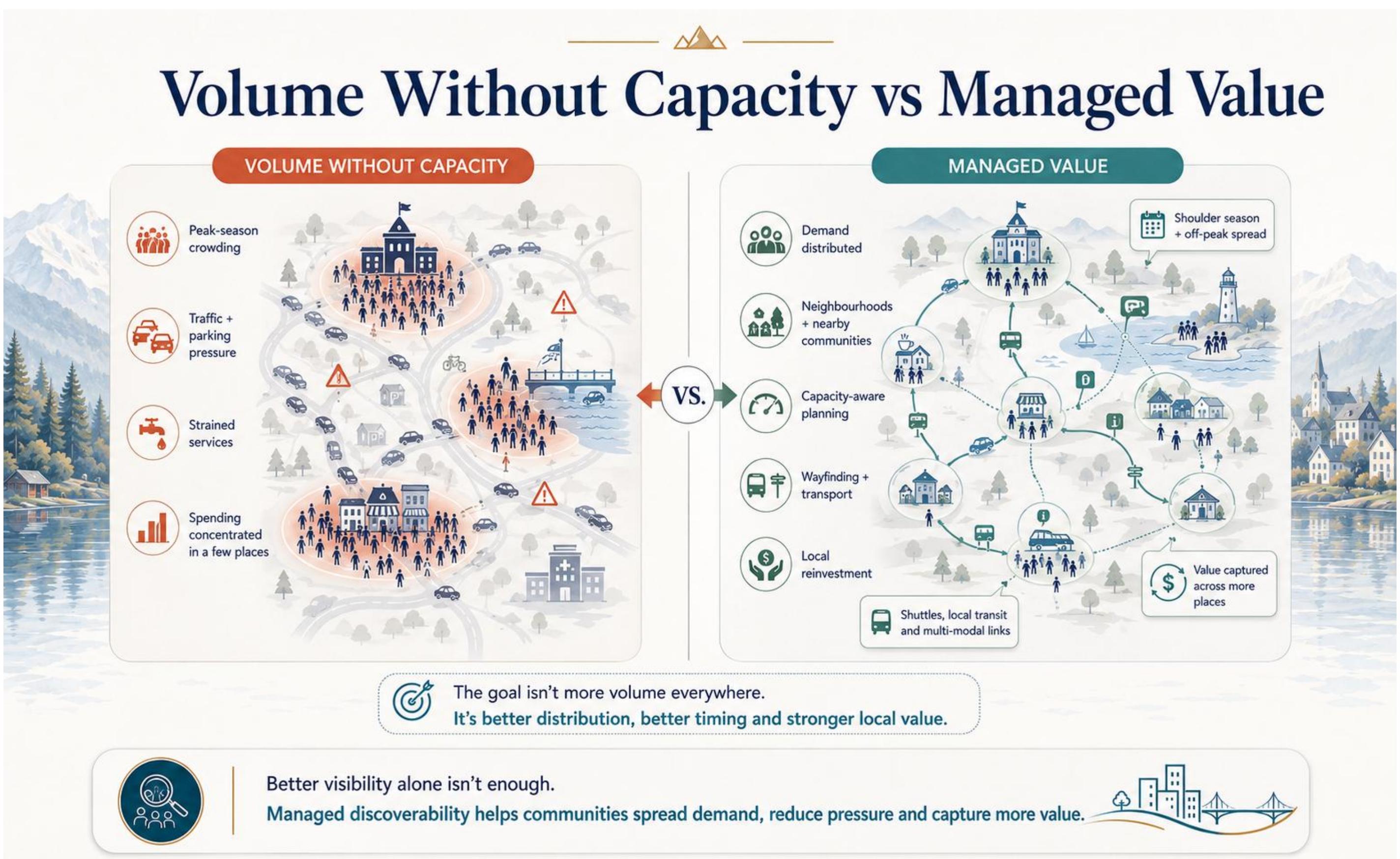
In Booking.com's 2025 survey of 32,000 travellers across 34 countries, respondents identified traffic congestion (38%), littering (35%), overcrowding (30%) and rising cost of living (29%) as common tourism-related challenges where they lived. Only 16% favoured capping visitor numbers as the primary answer. Respondents placed more emphasis on improved transport, waste management and environmental conservation. [12]

The OECD similarly warns that uneven visitor flows can create excessive pressure on infrastructure, the environment, local communities and other parts of the economy. Its policy guidance supports dispersing visitors across locations, extending demand into shoulder periods and improving infrastructure so destinations can manage flows more effectively. [9, 10]

This is why tourism success can't be measured by arrivals alone. A destination can have record visitor numbers and still produce poor outcomes if spending is concentrated, local residents carry the costs, workers can't find housing, public services are strained, or natural assets are degraded.

The objective

Focus on visitation that creates more local value with less concentrated pressure.



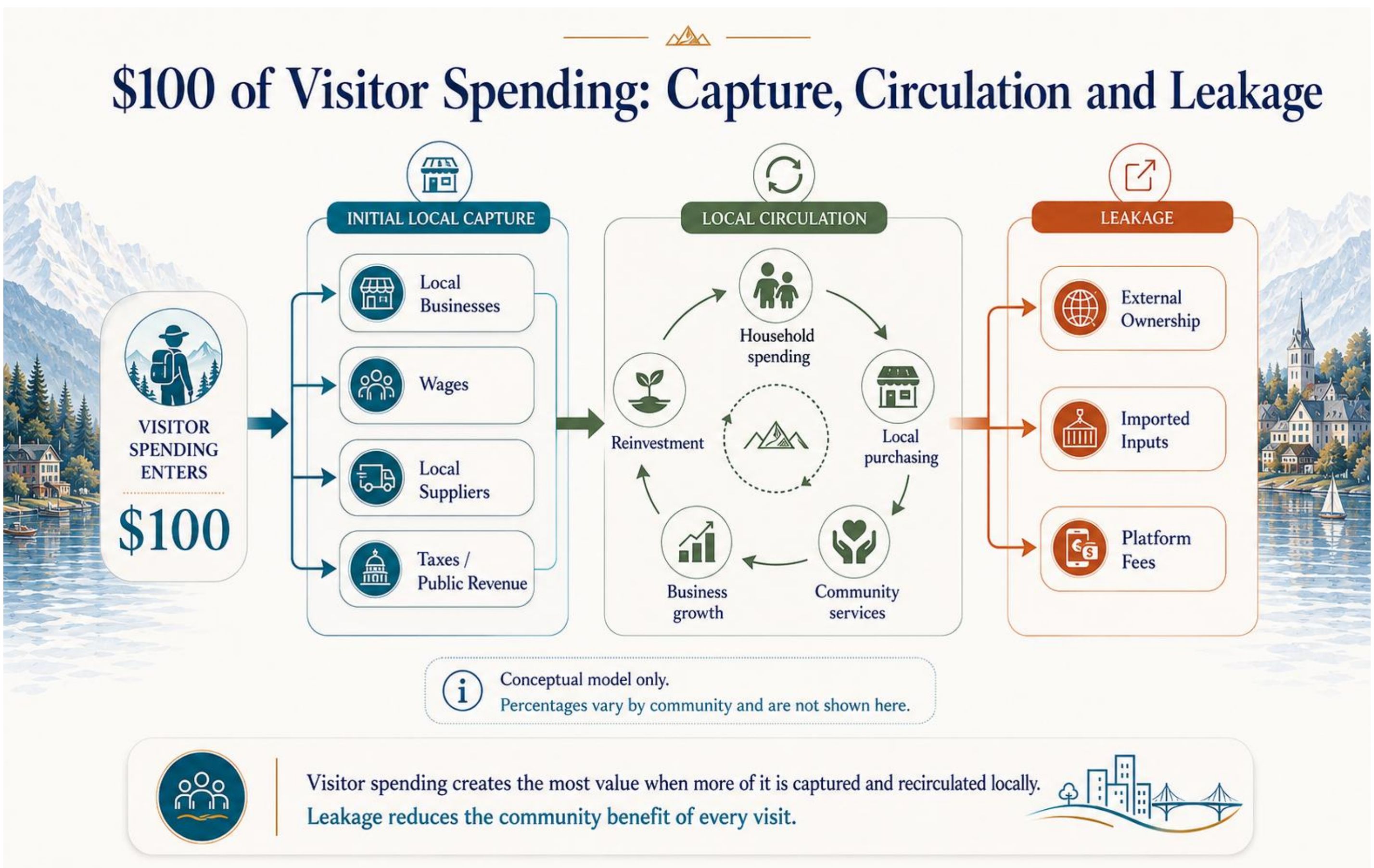
8. Reinvestment and Local Capture

Tourism's public value is substantial. In 2024, tourism generated $32.7 billion in government revenue across Canada. For every $100 in tourism spending, governments received an average of $25.21 through taxes and other attributable revenue. [5]

That figure doesn't mean $25.21 is automatically returned to the place where the visitor spent the money though. Revenue flows through federal, provincial, territorial, municipal and Indigenous governments, and public budgets aren't always earmarked by source. It does show that tourism contributes meaningfully to the fiscal capacity that supports public services.

Communities and governments should treat part of tourism's value as a reinvestment case. Visitor growth can justify and help fund stronger public transport, roads, trails, washrooms, waste systems, public spaces, broadband, signage, accessibility improvements, emergency services, conservation and cultural facilities. These aren't tourism-only assets. They make daily life more functional and improve the community's appeal to residents, workers and investors as well. [10]

The private side matters too. Local capture improves when visitors book with locally owned operators, eat at independent restaurants, buy from local retailers, attend community events and support regional suppliers. Leakage increases when revenue leaves through external ownership, imported inputs, platform fees or concentration among a small number of large firms. Some leakage is inevitable, but its scale determines how much tourism contributes to local development. [10]



9. Discoverability as Infrastructure

Infrastructure is usually understood as roads, utilities, transport and public facilities. In a digital visitor economy, information also has to function as infrastructure. Visitors need accurate, connected and actionable data to move through a place. Operators need a practical way to participate. Communities need enough visibility into demand and flow to make better decisions.

Infrastructure layer	What it does	Community value
Shared tourism data	Accurate information about operators, events, experiences, hours, location, accessibility and seasonality.	Fewer dead ends and stronger representation of the community's full inventory.
Discovery and personalisation	Recommendations based on interests, trip context, timing, mobility, budget and pace.	More relevant options and less dependence on one generic top-ten list.
Itinerary connectivity	The ability to combine accommodations, dining, events, trails and attractions into a workable plan.	Longer stays, more stops and wider distribution of spending.
Capacity and stewardship signals	Closures, permits, sensitivity, busy periods, operating windows and visitor suitability.	Better flow management and less pressure on fragile or overloaded assets.
Action pathways	Booking, inquiry, directions, tickets, calendars and clear next steps.	More visitor intent converted into measurable local activity.
Measurement	Data on coverage, flow, seasonality, conversion and local participation.	Evidence for investment, infrastructure and destination management.

This is the space Roamlii is building toward: a connected discovery, planning and booking ecosystem that helps visitors find more of what fits them while helping communities and operators become easier to understand, plan around and act on. The role isn't to replace local expertise or destination strategy. It's to give that expertise a stronger digital pathway into the visitor journey.

As AI-supported search and itinerary planning become more common, the quality of the underlying information becomes even more important. Natural-language interfaces can make planning easier, but they can also repeat the same popular recommendations when the broader local inventory is fragmented, unstructured or absent. [14, 15]

Visibility is part of the visitor infrastructure

Roads help visitors reach a community. Discoverability helps them understand where to go, what's available and how the pieces fit together. Without that digital layer, valuable experiences can remain effectively inaccessible.

9.1 A Framework for Managed Discoverability

Better visibility should be designed around community value, not simply more clicks. A managed discoverability framework can help destinations grow the visitor economy while protecting residents, infrastructure and sensitive places.

Principle	Focus	Application
1	Surface breadth	Represent the wider community, not only the best-known or best-funded assets.
2	Personalise relevance	Match visitors to different options based on their actual trip, interests and constraints.
3	Distribute in time and space	Promote nearby communities, alternative routes, quieter periods and shoulder seasons where capacity exists.
4	Respect limits	Use closures, capacity, permits, sensitivity and resident priorities as discovery inputs.
5	Connect to action	Make it easy to move from interest to itinerary, booking, inquiry, directions or attendance.
6	Measure local value	Track not only traffic and arrivals, but longer stays, business participation, dispersal, local capture and resident outcomes.

This framework changes the question from *'How do we get more people here?* to *'How do we help the right visitors discover more of the community at the right time, in ways the community can support?* That is a more durable economic development question.

10. What Communities Should Measure

Visitor counts and website traffic are useful, but they don't show whether tourism is creating broad local value. Communities need a more complete measurement framework that connects visibility, visitor behaviour, business outcomes, infrastructure and resident experience.

Measure	Management question
Inventory visibility	What share of local operators, events and experiences are accurately represented and discoverable?
Discovery distribution	Is attention concentrated on a few assets, or reaching a wider range of businesses and places?
Length of stay	Are visitors finding enough relevant reasons to stay longer?
Stops and categories	How many local businesses or experience categories are reached during a typical trip?
Season and weekday spread	Is demand moving into quieter periods where capacity exists?
Geographic dispersal	Are nearby towns, neighbourhoods and rural areas receiving appropriate visitor activity?
Conversion	Do discovery and planning lead to bookings, inquiries, attendance, directions or saved itineraries?
Local capture	How much spending reaches locally owned businesses, workers and suppliers?
Infrastructure pressure	Where are transport, waste, public spaces, trails or services approaching capacity?
Resident sentiment	Do residents believe tourism is improving or diminishing quality of life?
Environmental and cultural stewardship	Are natural and cultural assets being protected as demand grows?
Reinvestment	Are tourism-related public and private value strengthening the systems that support residents and visitors?

Not every community will have the resources to measure everything immediately. The practical starting point is to establish a small baseline, identify the most important local pressure points and economic gaps, then improve the data over time.

Measure the value, not only the volume

Visitor counts show how many people arrived. Stronger measurement shows where they went, how long they stayed, which businesses benefited, when demand occurred and how much value remained in the community.

11. Recommendations for Industry Leaders

The opportunity now is to move from broad tourism promotion towards a more connected, measurable and community-centred approach. That means helping visitors discover more of what already exists, improving how those assets work together and ensuring visitor growth contributes to stronger local value.

1. **Treat tourism as economic development.** Connect visitor strategy with business development, infrastructure, workforce, culture, transport and community planning.
2. **Build the complete inventory before promoting harder.** A community can't distribute attention across assets that aren't represented accurately or consistently.
3. **Prioritise relevance over generic popularity.** Use visitor context to surface different options, rather than sending everyone through the same top-ten funnel.
4. **Design dispersal around capacity.** Direct visitors to prepared places and appropriate seasons, not simply anywhere that appears less busy.
5. **Connect discovery to a full trip.** Help visitors combine accommodations, events, food, attractions, trails, retail and transport into practical itineraries.
6. **Reinvest in shared infrastructure.** Use the economic and fiscal case for tourism to strengthen transport, public spaces, wayfinding, accessibility, waste systems, conservation and services.
7. **Measure what residents experience.** Visitor growth that erodes liveability isn't a durable success. Resident sentiment and infrastructure pressure belong beside economic indicators.
8. **Reduce leakage and widen participation.** Support local ownership, procurement, supplier networks and participation by smaller operators.
9. **Prepare for AI-mediated discovery.** Structure content so AI and search tools can interpret the breadth of the destination accurately, while retaining human governance and local context.

The priority is stronger local value

The strongest strategies connect visibility, capacity, visitor flow and local participation. Success comes from helping the right visitors discover more of the community at the right time, while ensuring residents and local businesses share in the benefit.

12. What a Connected Visitor Journey Looks Like

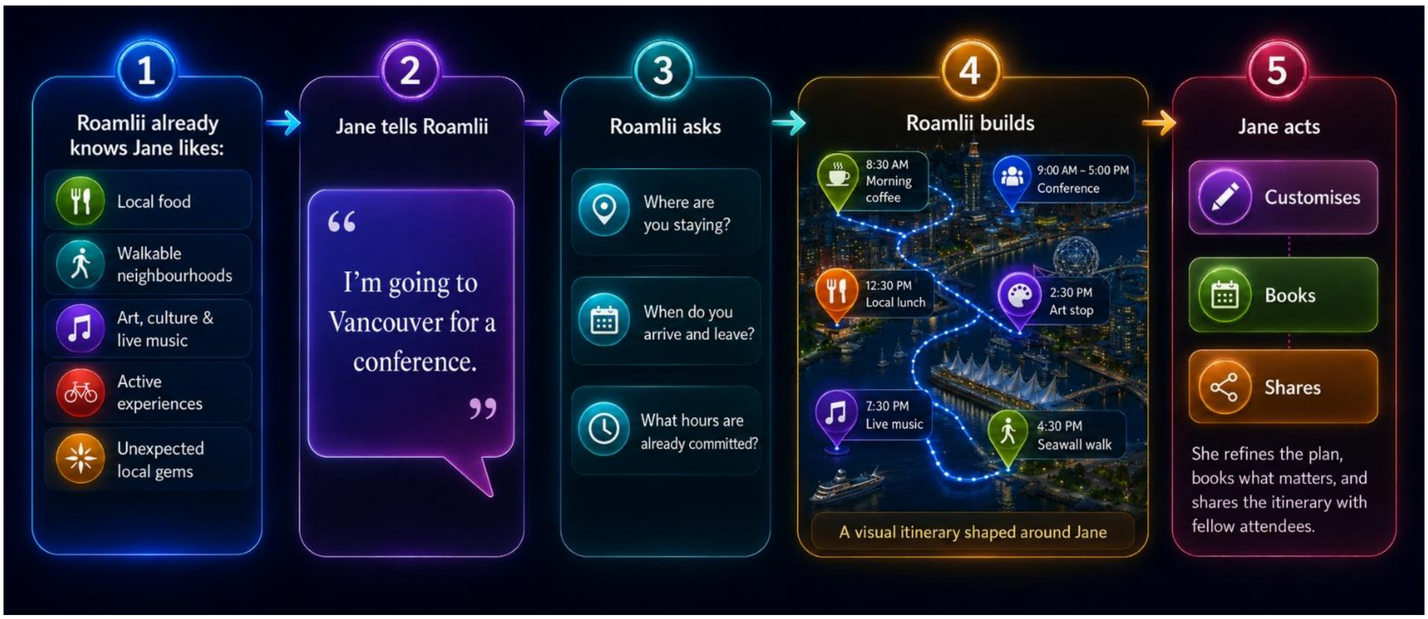
Jane is heading to Vancouver for a conference and wants the time around it to feel personal, relevant and worth exploring.

Roamlii already understands that she likes local food, walkable neighbourhoods, arts and culture, active experiences and unexpected local gems. It asks only what's still missing, then builds a plan around her schedule.

The result is a trip that feels personal rather than generic. Jane discovers places she wouldn't have known to search for, fills the gaps around her conference, and can customise, book and share the itinerary with confidence.

That's where the wider value begins. A more relevant journey helps Jane reach more businesses, neighbourhoods and experiences. For operators, it creates visibility at the moment there's a genuine fit. For communities, it helps more of the local inventory participate in each visit.

Roamlii is building the connected digital infrastructure behind that journey. It brings fragmented information together, personalises discovery and creates clearer paths from interest to action.



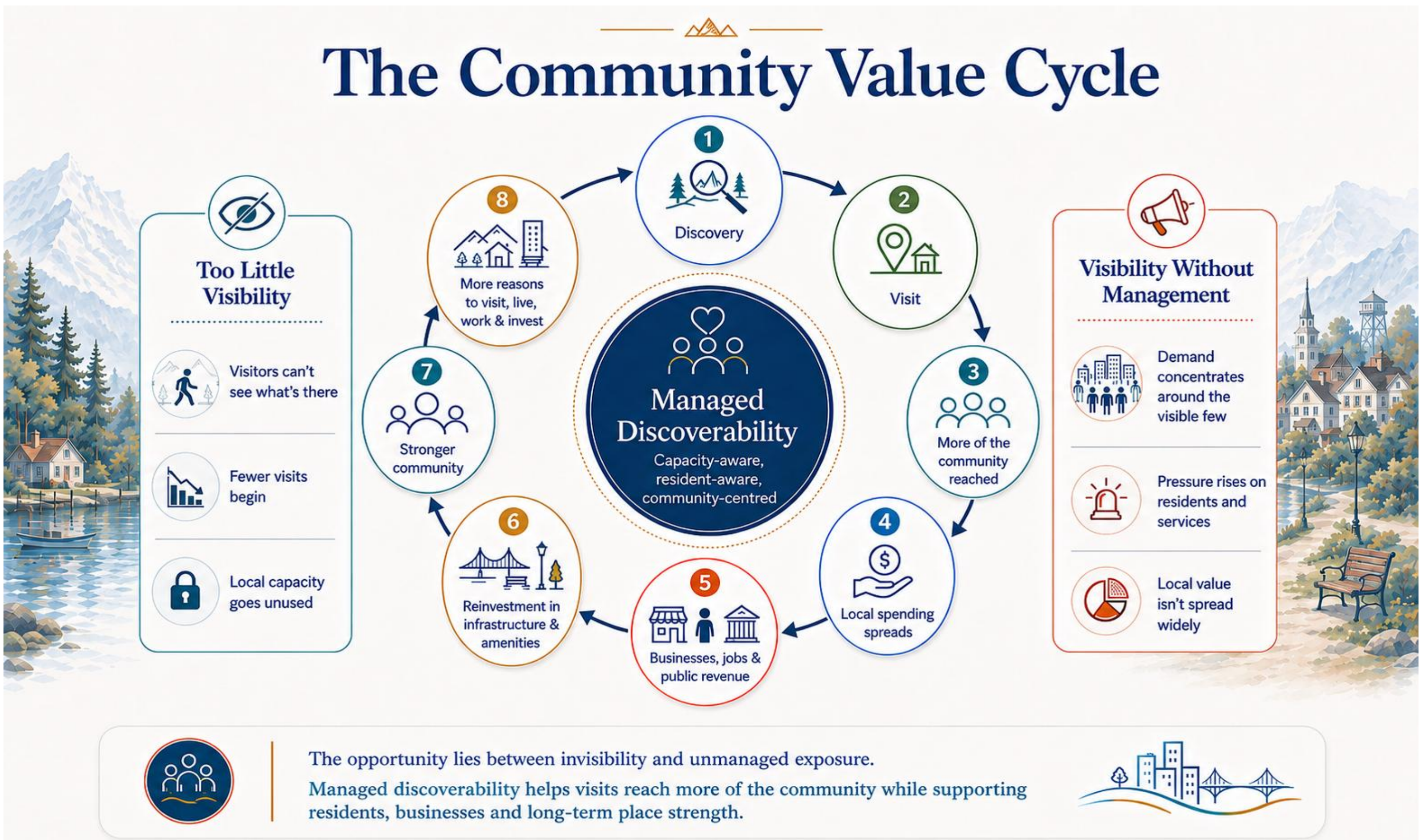
Roamlii's role in this model

Connect fragmented community information, understand visitor intent, surface relevant local options, build fuller itineraries and give regions a stronger foundation for measuring and managing visitor value.

13. Summary

A community can't benefit from what visitors can't see. It also can't build a healthy visitor economy by making everything visible without regard for capacity, residents or the places being promoted. The opportunity lies between those two failures. Communities can treat discoverability as infrastructure, connect the wider local inventory, match different visitors with different options, extend stays where appropriate, distribute spending across more businesses and reinvest tourism's value into the systems that support both visitors and residents.

That creates a stronger cycle: discovery leads to a visit; the visit reaches more of the community; local spending supports businesses, jobs and public revenue; investment improves infrastructure and amenities; and a stronger community creates more reasons to visit, live, work and invest.



Technology won't solve infrastructure pressure, resident concerns, housing challenges or tourism leakage on its own.

Those issues require governance, investment and local decision-making. What connected discovery can do is make the visitor economy more legible and manageable. More of the community can participate, more suitable options can be surfaced, demand can be distributed more intelligently and tourism strategy can move beyond promoting the same few assets to everyone.

The goal is a stronger community value cycle

Managed discoverability helps more visitors reach more of the community, while keeping capacity, residents and local priorities at the centre. The result is stronger local participation, better-distributed spending and more value reinvested into the places people live and visit.

Connectivity doesn't just support tourism. When it's managed well, it strengthens communities.

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[1] OECD (2023). Rethinking Regional Attractiveness in the New Global Environment. Source

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[13] Booking.com (2026). What Locals Want: Sustainable travel habits informed by residents. Source

[14] McKinsey & Company (2026). Travel planning gets an AI upgrade. Source

[15] Expedia Group (2026). New AI travel planning and personalised discovery capabilities announced at Explore 2026. Source

14.1 Research Notes

National figures describe the scale of Canada's visitor economy and shouldn't be applied mechanically to a specific community. Local outcomes vary by visitor mix, season, ownership, wage structure, supply chains, infrastructure, capacity and leakage. Community-level business cases should use local data wherever it exists.

The traveller surveys cited from Booking.com are industry research rather than official statistics. They are included to illustrate resident and traveller attitudes alongside the policy and economic evidence from Statistics Canada and the OECD.

All web sources were accessed in July 2026.