

# TOTA

THOMPSON OKANAGAN  
TOURISM ASSOCIATION

## REGIONAL DISTRICT OKANAGAN-SIMILKAMEEN (RDOS) COMMUNITY RESEARCH

2018 - 2019 Visitation Summary

Not for Circulation or  
Public Distribution



All Research is subject to the signing of a non-disclosure agreement (NDA) and cannot be shared with third-parties or anyone outside the organization.

# RESEARCH PROGRAM

## Research options for Destination Marketing Organizations and Regional Districts.

- Integrated Research Program consisting of both Visitor and Market Research utilizing data from Environics Analytics and TELUS Insights.
- Program intended to benefit DMO's, Local and Regional Government and Operators.
- All Research is subject to the signing of a non-disclosure agreement (NDA) and cannot be shared with third-parties or anyone outside the organization.



# DATA AND PRIVACY

- TELUS recognizes that Big Data comes with big responsibility to protect the privacy of individuals. They have implemented industry-leading standards to protect privacy every step of the way through:
  - De-Identification of data – meaning it cannot be traced back to an individual.
  - Aggregation of data into large data pools ensuring privacy is fully protected at all times.
  - Data extrapolation to be representative of the total Canadian Population.
- By de-identifying and aggregating the data, it is possible to perform geographic and movement analysis, while respecting privacy.



# DATA AND PRIVACY

- TELUS has implemented industry-leading Privacy and Design standards to ensure that privacy is not compromised.
- All the data analyzed by TELUS Insights is de-identified, meaning it cannot be traced back to an individual. It is also aggregated into large data pools to reveal mass-movement patterns and trends, and extrapolated to be representative of the total Canadian population as a further means of ensuring their privacy is protected at all times.
- For further information, please visit:
  - [telus.com/insights](https://telus.com/insights)
  - Or Email: [telusinsights@telus.com](mailto:telusinsights@telus.com)







# METHODOLOGY

Data was collected off of cellular network towers throughout the Thompson Okanagan to deliver insightful information on regional tourists.

Each tower is oriented to a specific region in order to determine where the visitors are within the area.

In order to be counted as a visitor to the region, a tourist must spend a minimum of 90 minutes stopped at a single location. Total Year to Date Visitation breaks down those visitors by 90 minutes as well as Single Overnight Stays.

Overnight guests were calculated based on where they spent the majority of nighttime hours (between 11:00pm and 6:00am).

Information available includes:

## Regional Visitation

- 90 minutes (Day Trippers)
- Single Overnight Stay

## Visitor Origin

- Province
- Country

## Overnight Stay

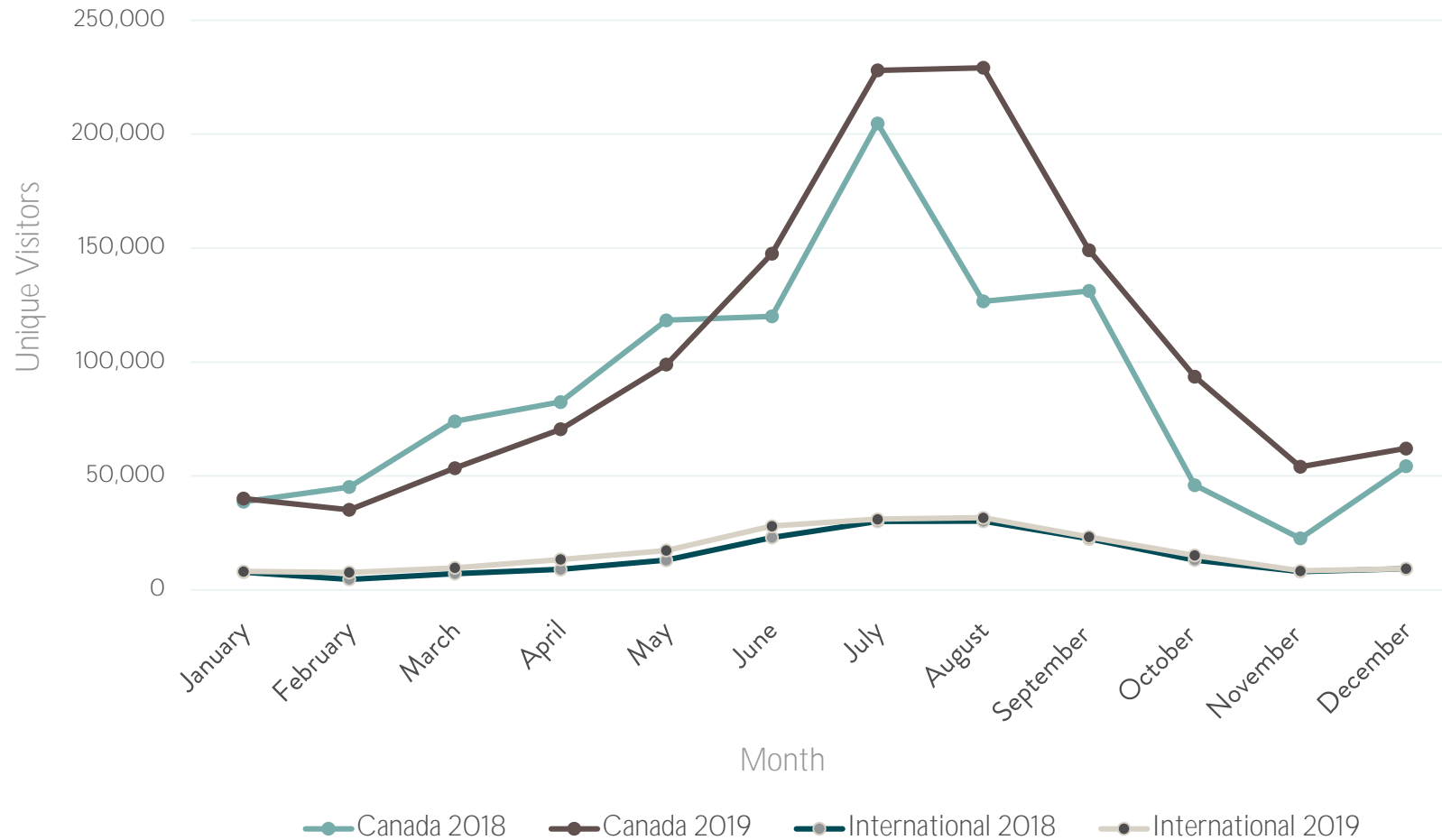
- Length of Stay
- Repeat Visitation

## Regional Movement

- Canada
- International

# DISTRICT VISITATION 2018-2019

# TOTAL 2018-2019 RDOS DISTRICT VISITATION

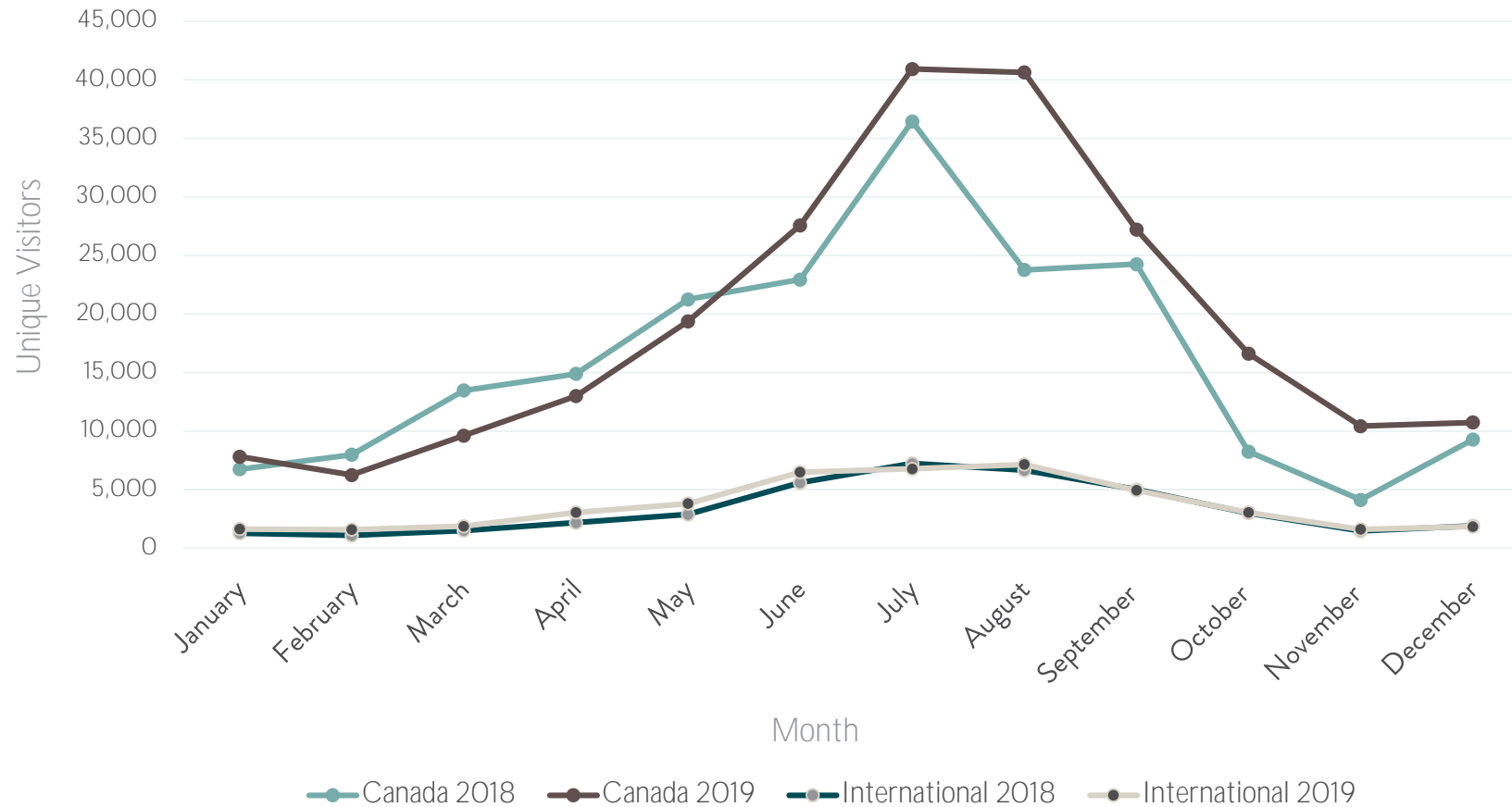


## Key Findings Unique Visitation by Month:

- Note:** The Thompson Okanagan Region experienced localized flooding during the month of June 2018 and forest fires/heavy smoke during August 2018.
- Domestic Visitation increased by **11%** when comparing July 2018 to July 2019.
  - July was the peak month for domestic visitation in 2018, August was the peak in 2019.
- Domestic visitation to the RDOS District increased by **81%** when comparing August 2018 to August 2019.
- International Visitation has remained consistent year over year (2018/2019) despite the level of natural disasters that occurred in Summer 2018.
- 2018 and 2019 International Visitation both peaked in August with an increase of **5%** year over year.

# TOTAL 2018-2019 RDOS DISTRICT VISITATION

## DAY TRIPPERS



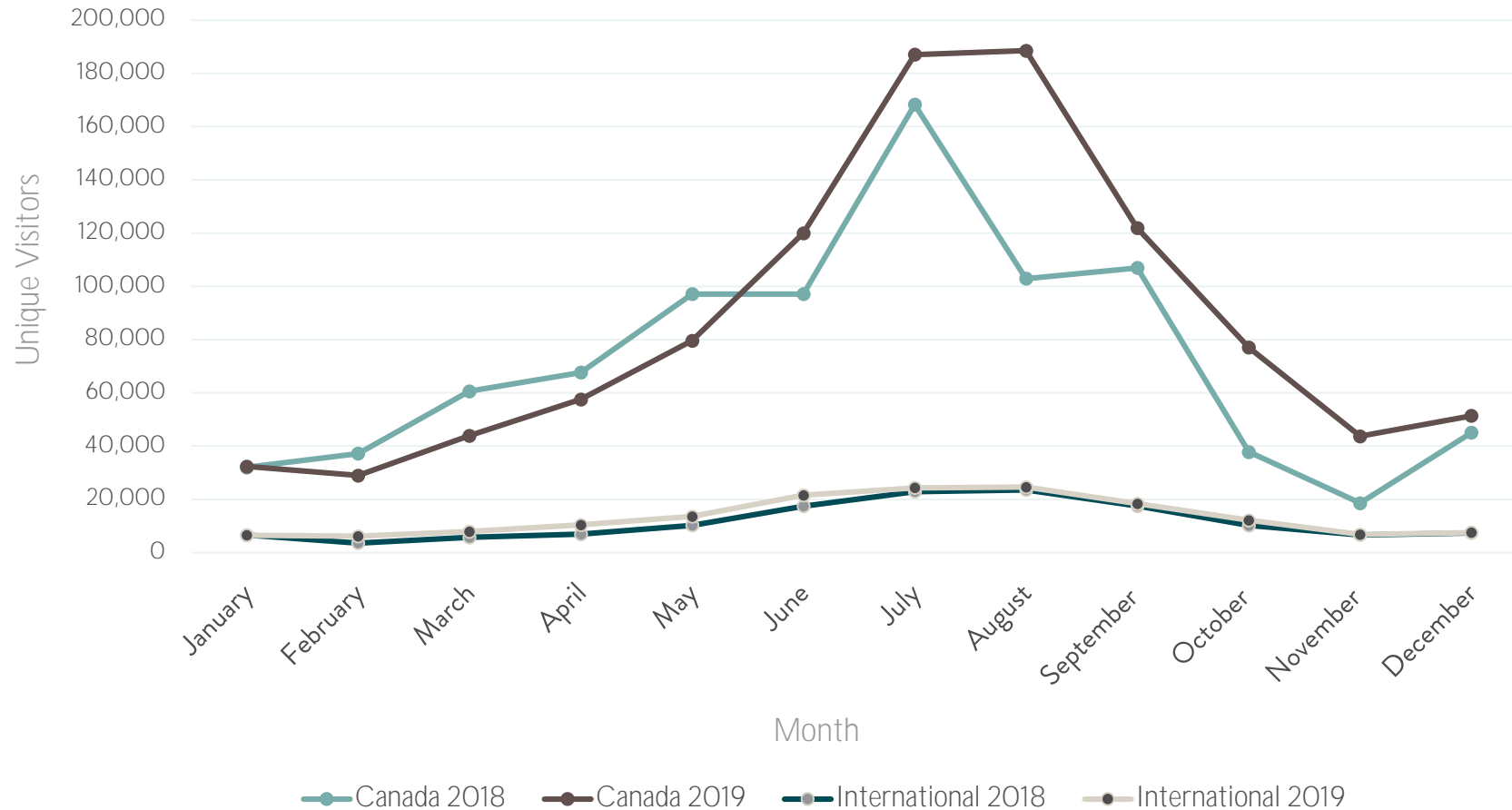
### Key Findings Unique Visitation by Month:

- Note:** The Thompson Okanagan Region experienced localized flooding during the month of June 2018 and forest fires/heavy smoke during August 2018.
- Domestic Day Trip Visitation increased by **12%** when comparing July 2018 to July 2019.
  - July was the peak month for domestic visitation in 2018 and 2019.
- Domestic visitation to the RDOS District increased by **71%** when comparing August 2018 to August 2019.
- International Visitation has remained consistent year over year (2018/2019) despite the level of natural disasters that occurred in Summer 2018.
- International Day Trip Visitation increased by **7%** when comparing August 2018 to August 2019.
  - July was the peak month for International visitation in 2018, August was the peak in 2019.
- International visitation to the Thompson District decreased **6%** when comparing July 2018 to July 2019.



# TOTAL 2018-2019 RDOS DISTRICT VISITATION

## MINIMUM ONE NIGHT STAY



### Key Findings Unique Visitation by Month:

- Note:** The Thompson Okanagan Region experienced localized flooding during the month of June 2018 and forest fires/heavy smoke during August 2018.
- Domestic Minimum One Night Stay Visitation increased by **11%** when comparing July 2018 to July 2019.
  - July was the peak month for domestic visitation in 2018, August was the peak in 2019.
- Domestic visitation to the RDOS District increased by **83%** when comparing August 2018 to August 2019.
- International Visitation has remained consistent year over year (2018/2019) despite the level of natural disasters that occurred in Summer 2018.
- 2018 and 2019 International Visitation both peaked in August with an increase of **4%** year over year.

SEASONAL YEAR IN REVIEW  
2018-2019

# RDOS District 2019 Seasonal Year in Review – British Columbia

## Domestic Average Monthly Visitation

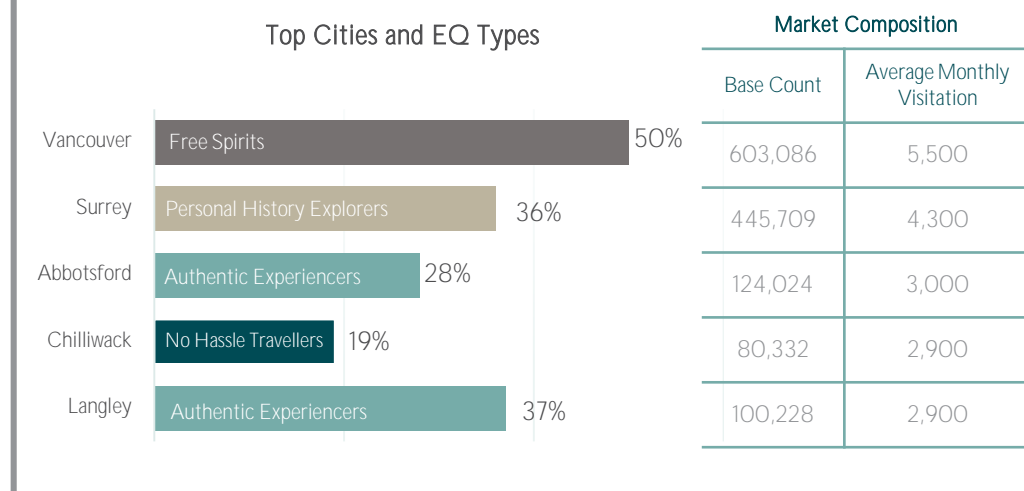
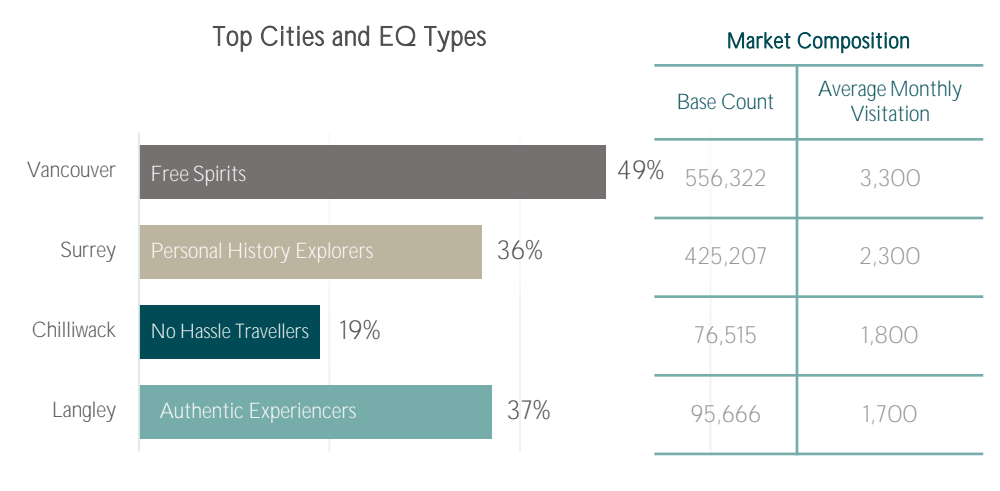


### Overview

### ❄ Winter (December 2018, January, February 2019)

### 🌸 Spring (March, April, May)

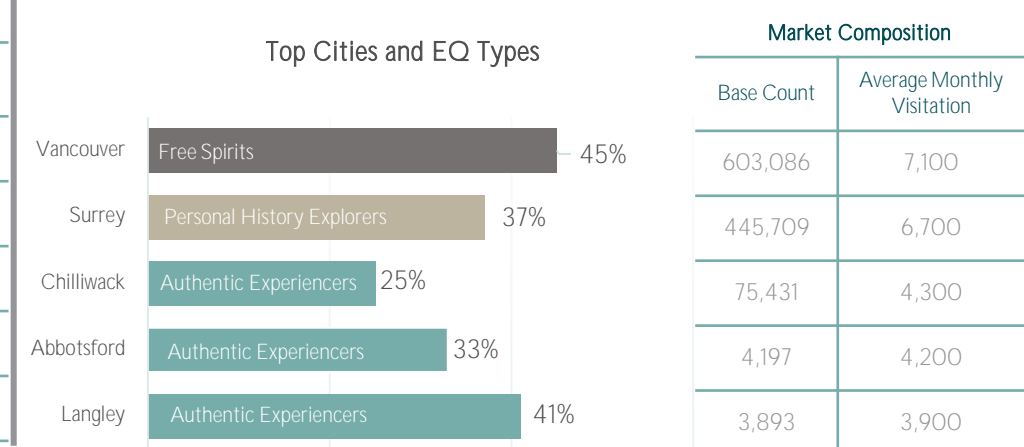
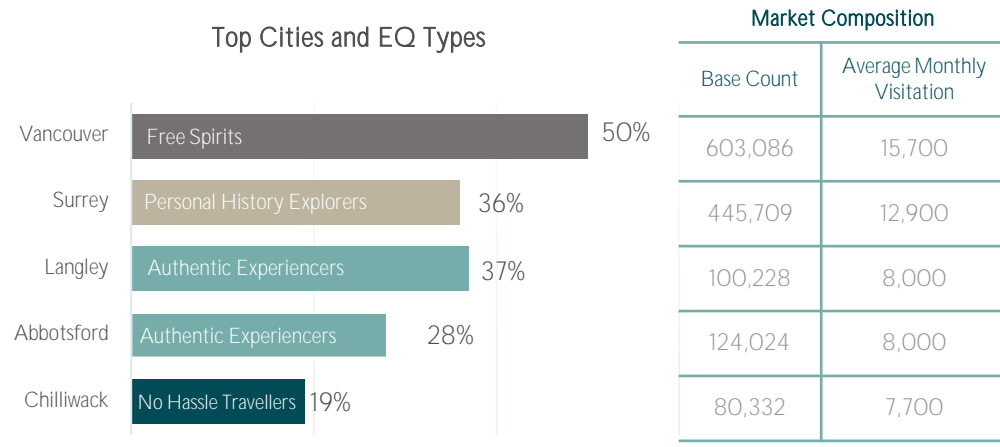
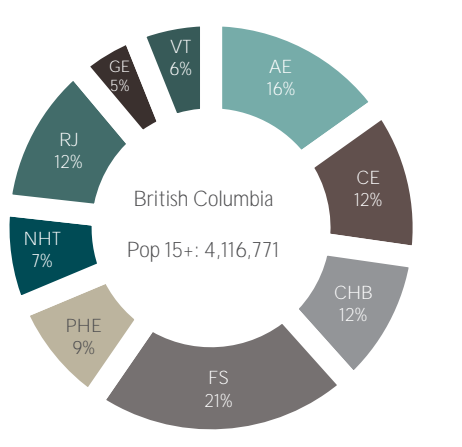
- The Peak season for average monthly BC visitation in 2019 is **Summer**, followed by Fall, Spring and Winter.
- Vancouver** dominates in visitor origin across all four seasons.
- Free Spirits** from Vancouver are the top EQ Type across all seasons.
- Personal History Explorers** from Surrey represent the second largest market across all seasons.
- No Hassle Travellers** from Chilliwack represent the third market in Winter and Spring, **Authentic Experiencers** from Chilliwack represent the third market in Fall and **Authentic Experiencers** from Langley the third market in Summer.



### BC EQ Composition 2019

### ☀ Summer (June, July, August)

### 🍂 Fall (September, October, November)



**Note:** Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal **monthly** averages, rounded to the nearest 100<sup>th</sup> and **not** total unique visitor count.

**Note:** Base Count = Population 15+ within the custom target area (composed of top ranking Visitor Origin FSA's. Percentages relate to the EQ composition within the custom Target Area.



# RDOS District 2019 Seasonal Year in Review – Alberta

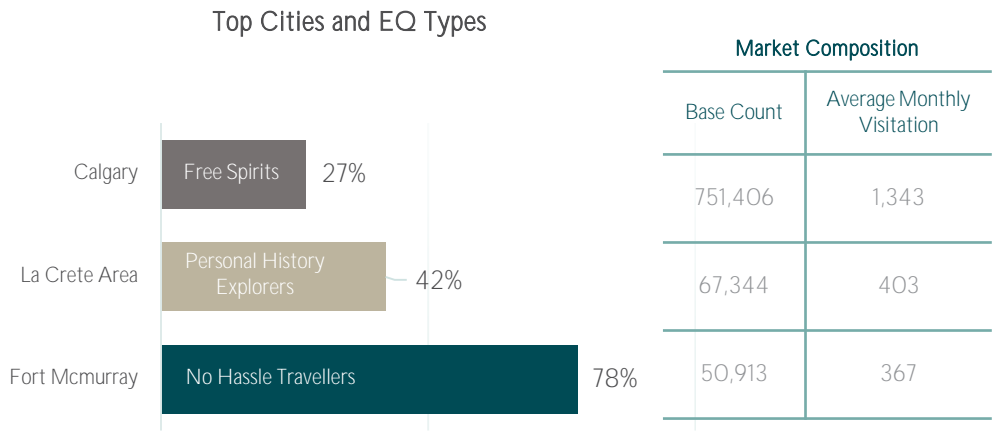
## Domestic Average Monthly Visitation



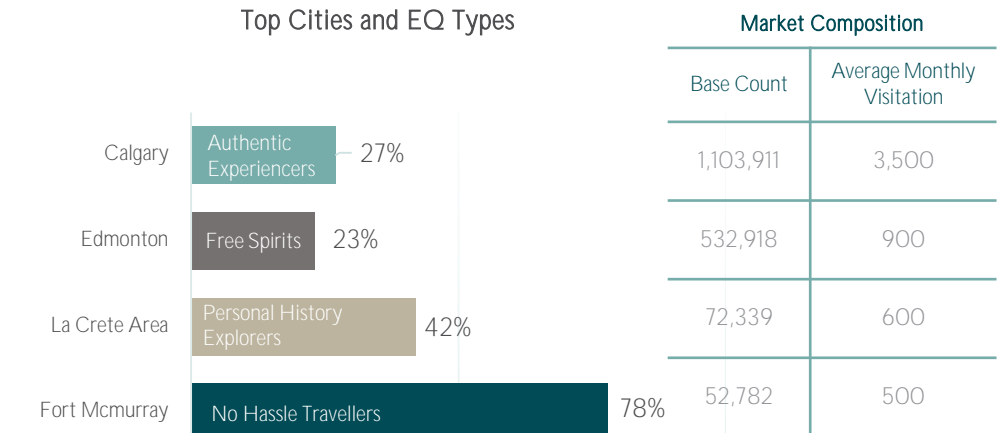
### Overview

- The Peak season for average monthly Alberta visitation in 2019 is **Summer**, followed by Fall, Spring and Winter.
- Calgary** dominates in visitor origin across all seasons.
- Free Spirits** are the top EQ Type for the Calgary market in Fall and Winter. **Authentic Experiencers** are the top EQ Type for Calgary in Spring and Summer.
- Free Spirits** from Edmonton represent the second largest market in Spring and Fall. **Gentle Explorers** from Edmonton represent the second market in Summer.
- Personal History Explorers** from the La Crete Area represent the second largest market in Winter.

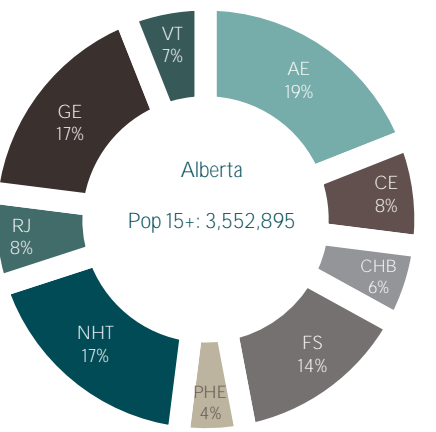
### ❄️ Winter (December 2018, January, February 2019)



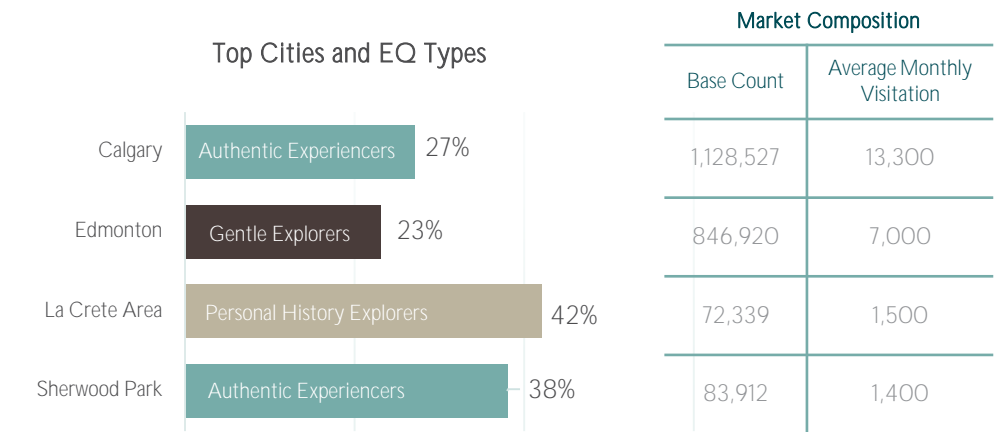
### 🌸 Spring (March, April, May)



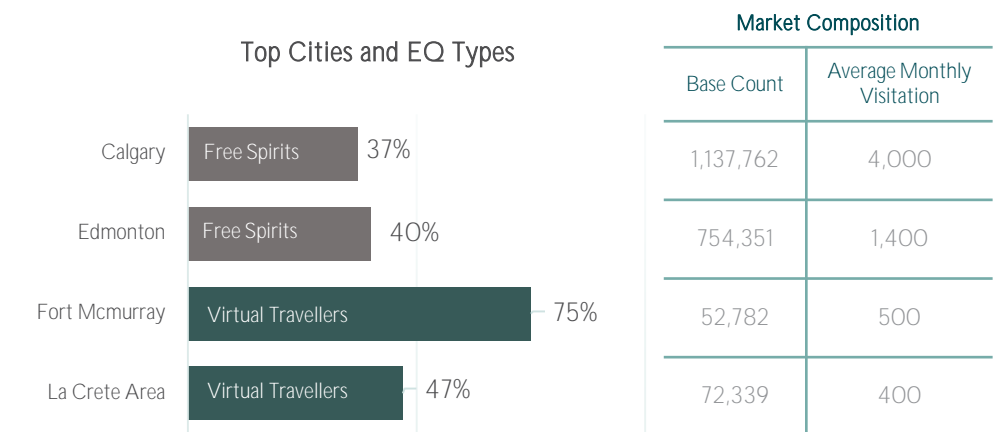
### Alberta EQ Composition 2019



### ☀️ Summer (June, July, August)



### 🍂 Fall (September, October, November)



**Note:** Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal **monthly** averages, rounded to the nearest 100<sup>th</sup> and **not** total unique visitor count.

**Note:** Base Count = Population 15+ within the custom target area (composed of top ranking Visitor Origin FSA's. Percentages relate to the EQ composition within the custom Target Area.



# RDOS District 2018 Seasonal Year in Review – British Columbia

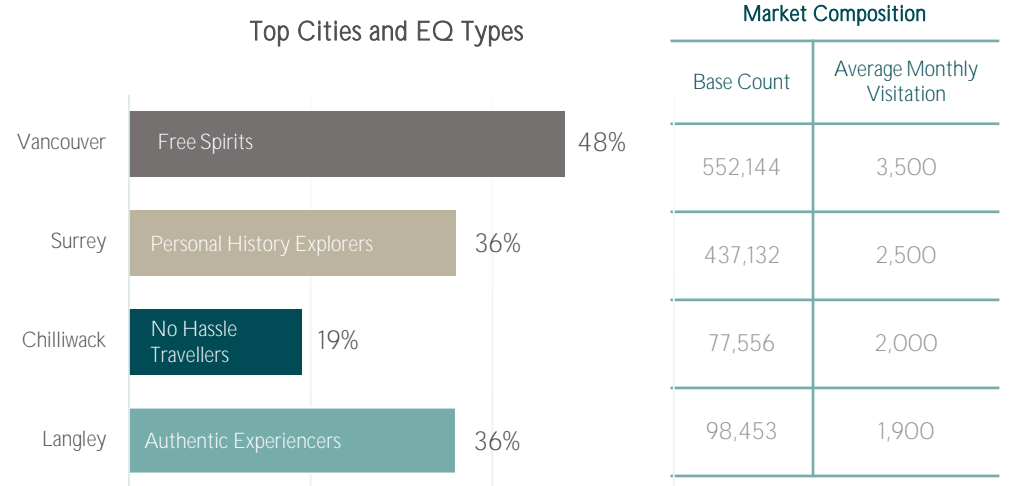
## Domestic Average Monthly Visitation



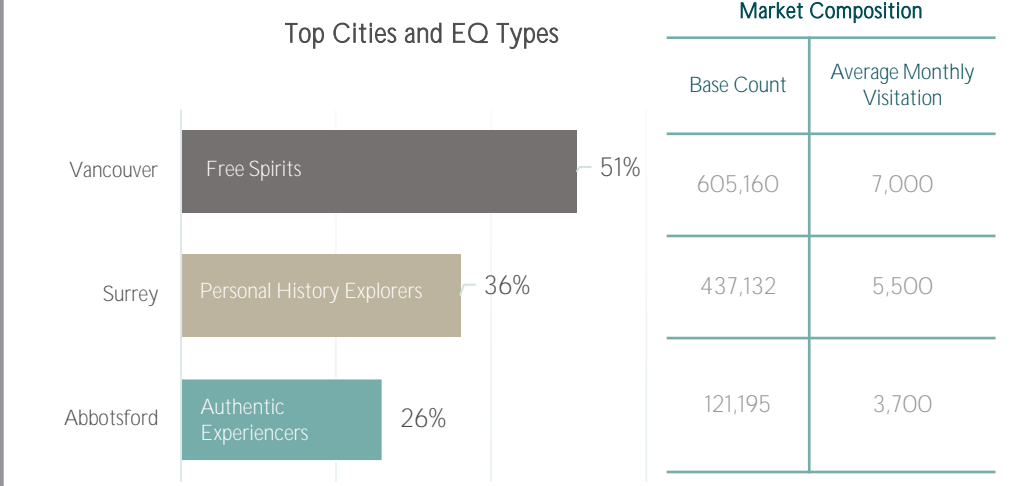
### Overview

- The Peak season for average monthly BC visitation in 2018 is **Summer**, followed by Spring, Fall and Winter
- Free Spirits** from Vancouver dominates in visitor origin across all four seasons.
- Personal History Explorers** from Surrey represent the second largest market during all four seasons.
- Authentic Experiencers** from Abbotsford represent the third largest market during Spring and Fall. **Authentic Experiencers** from Langley are third in Summer and **No Hassle Travellers** from Chilliwack are third in Winter.

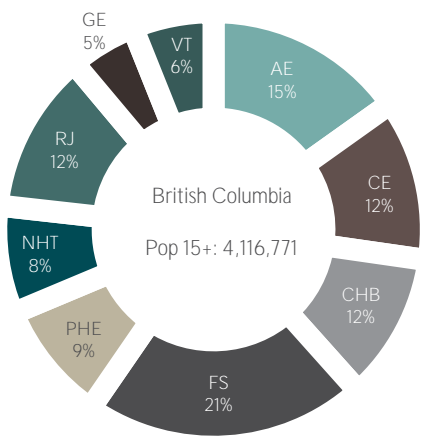
### ❄️ Winter (December 2018, January, February 2018)



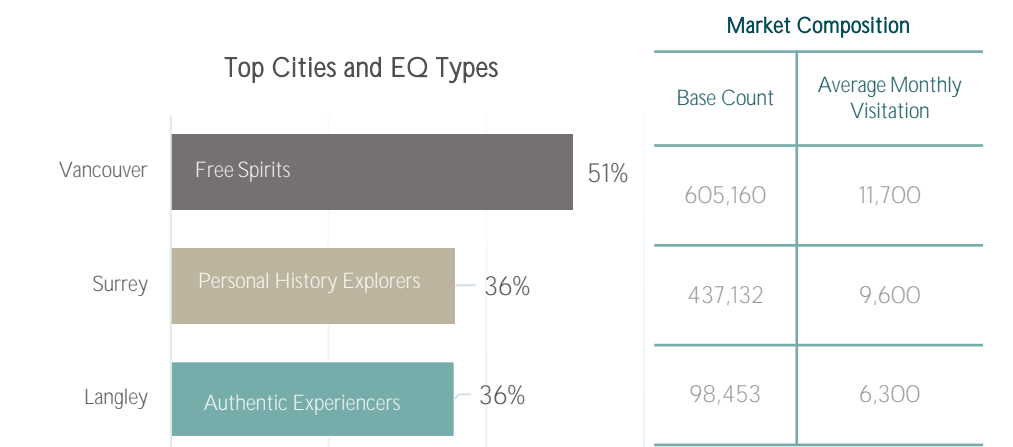
### 🌸 Spring (March, April, May)



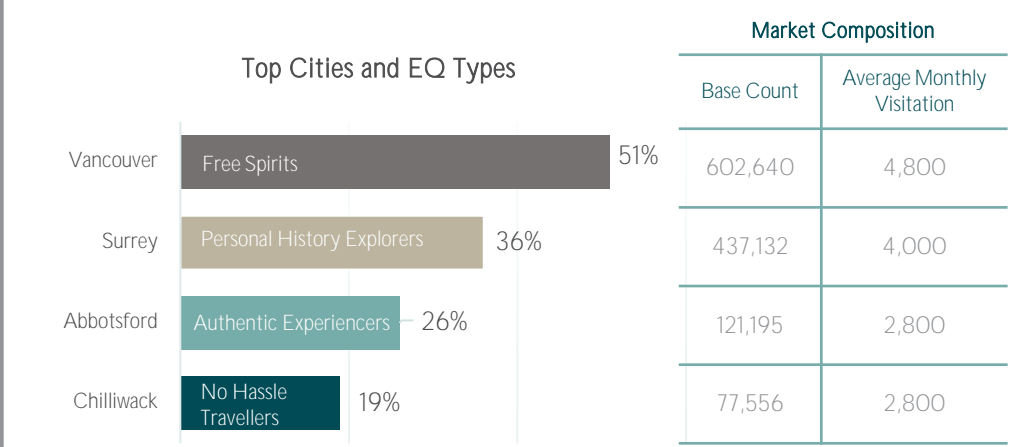
### BC EQ Composition 2018



### ☀️ Summer (June, July, August)



### 🍂 Fall (September, October, November)



**Note:** Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal **monthly** averages, rounded to the nearest 100<sup>th</sup> and **not** total unique visitor count.

**Note:** Base Count = Population 15+ within the custom target area (composed of top ranking Visitor Origin FSA's. Percentages relate to the EQ composition within the custom Target Area.



# RDOS District 2018 Seasonal Year in Review – Alberta

## Domestic Average Monthly Visitation



### Overview

- The Peak season for average monthly Alberta visitation in 2018 is **Summer**, followed by Spring, Fall and Winter.
- Calgary** dominates in visitor origin across all four seasons.
- Authentic Experiencers** from Calgary are the top EQ Type across all seasons (with the exception of Winter where **Free Spirits** from Calgary rank first).
- Gentle Explorers** from Edmonton represent the second largest market across all seasons, (with the exception of Winter where **No Hassle Travellers** from the La Crete Area rank second).

### ❄️ Winter (December 2018, January, February 2018)

#### Top Cities and EQ Types

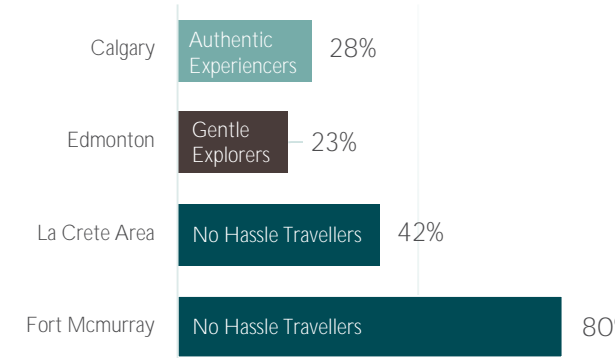


#### Market Composition

City	Base Count	Average Monthly Visitation
Calgary	773,379	1,500
La Crete Area	76,597	400
Fort McMurray	56,674	400

### 🌸 Spring (March, April, May)

#### Top Cities and EQ Types



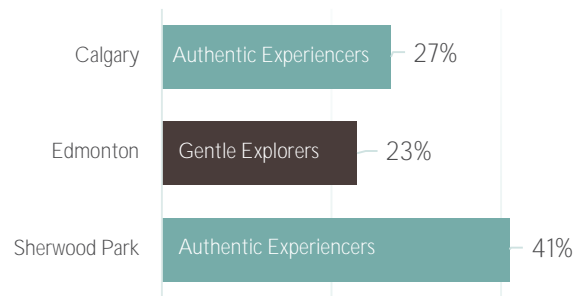
#### Market Composition

City	Base Count	Average Monthly Visitation
Calgary	1,099,847	4,600
Edmonton	642,947	1,700
La Crete Area	76,597	600
Fort McMurray	56,674	600

### Alberta EQ Composition 2018

### ☀️ Summer (June, July, August)

#### Top Cities and EQ Types

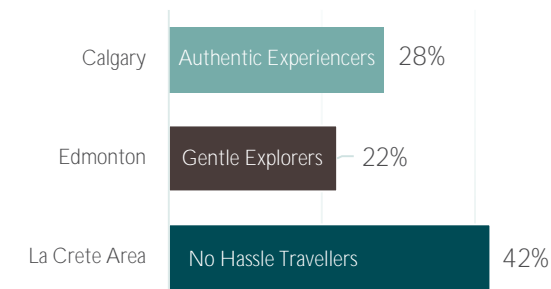


#### Market Composition

City	Base Count	Average Monthly Visitation
Calgary	1,112,994	10,400
Edmonton	836,378	5,400
Sherwood Park	85,220	1,000

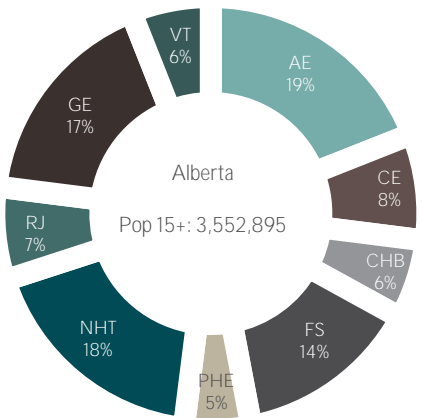
### 🍂 Fall (September, October, November)

#### Top Cities and EQ Types



#### Market Composition

City	Base Count	Average Monthly Visitation
Calgary	1,099,847	2,900
Edmonton	683,885	1,100
La Crete Area	76,597	400



**Note:** Visitation numbers use the minimum 90 minute stay in region definition and are based on seasonal **monthly** averages, rounded to the nearest 100<sup>th</sup> and **not** total unique visitor count.

**Note:** Base Count = Population 15+ within the custom target area (composed of top ranking Visitor Origin FSA's. Percentages relate to the EQ composition within the custom Target Area.





# AVERAGE MONTHLY VISITATION BY SEASON

# Spring 2018 vs. Spring 2019: Domestic and International Average Monthly Visitation by Season

RDOS District

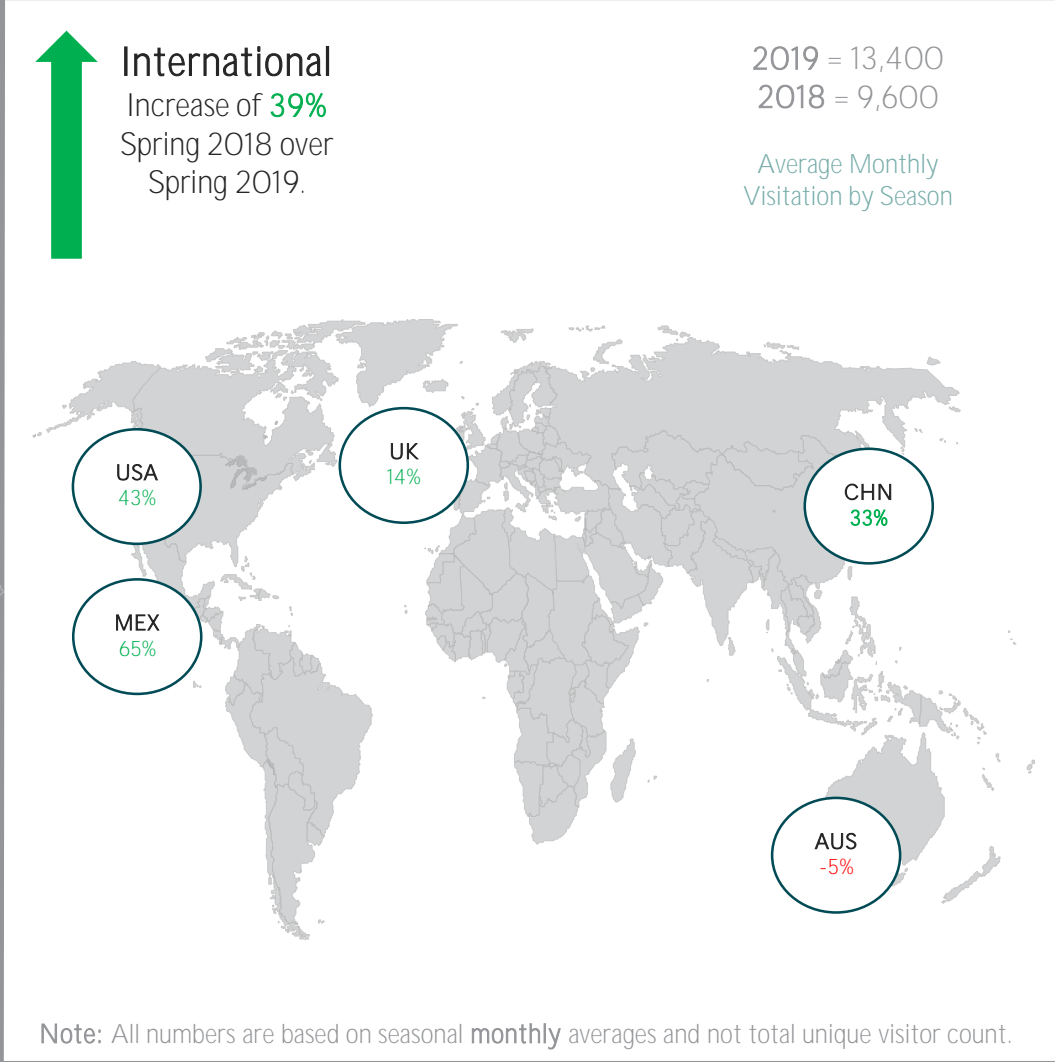
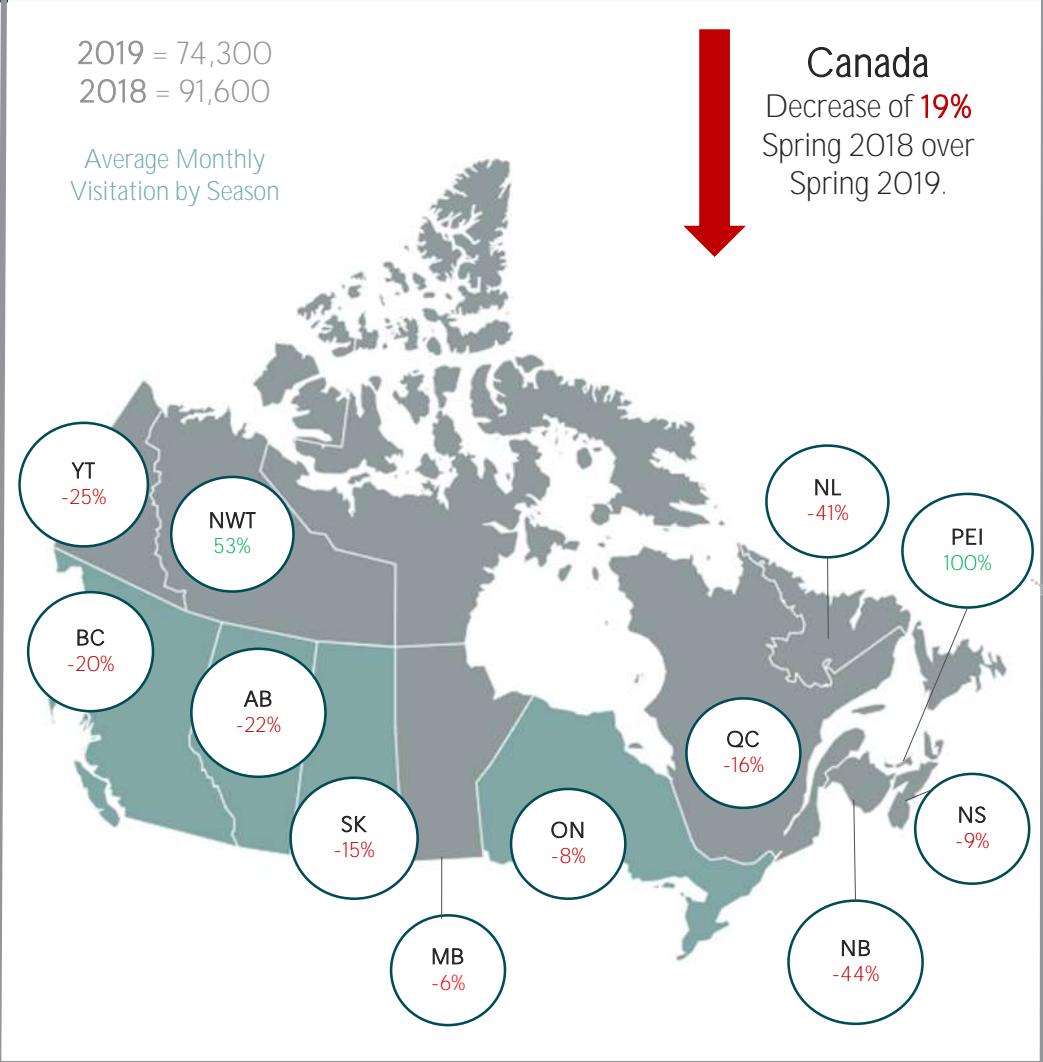
Spring = March | April | May

## Overview

## Domestic Average Monthly Visitation - Spring

## International Average Monthly Visitation - Spring

- Throughout **Spring 2018** the RDOS District saw an average of **91,600 Domestic Unique Visitation per month**. During the same time period in **2019** the District saw an average of **74,300 Domestic Unique Visitation per month**, a decrease of **19%** season over season, year over year.
- The decrease is consistent across all Provinces, with the exception of the Northwest Territories, up **53%** and Prince Edward Island, up **100%** (Note: there was no ranking visitation from PEI in Spring 2018, resulting in a total increase in 2019) when comparing average monthly visitation in Spring 2018 and 2019.
- Note:** there was no ranking average seasonal visitation from Nunavut in Spring 2018 or Spring 2019.
- Throughout **Spring 2018** the RDOS District saw an average of **9,600 International Unique Visitation per month**. During the same time period in **2019** the District saw an average of **13,400 International Unique Visitation per month**, an increase of **39%** season over season, year over year.
- The increase is consistent across the top countries, with the exception of Australia, down **5%** when comparing average monthly visitation in Spring 2018 and 2019.

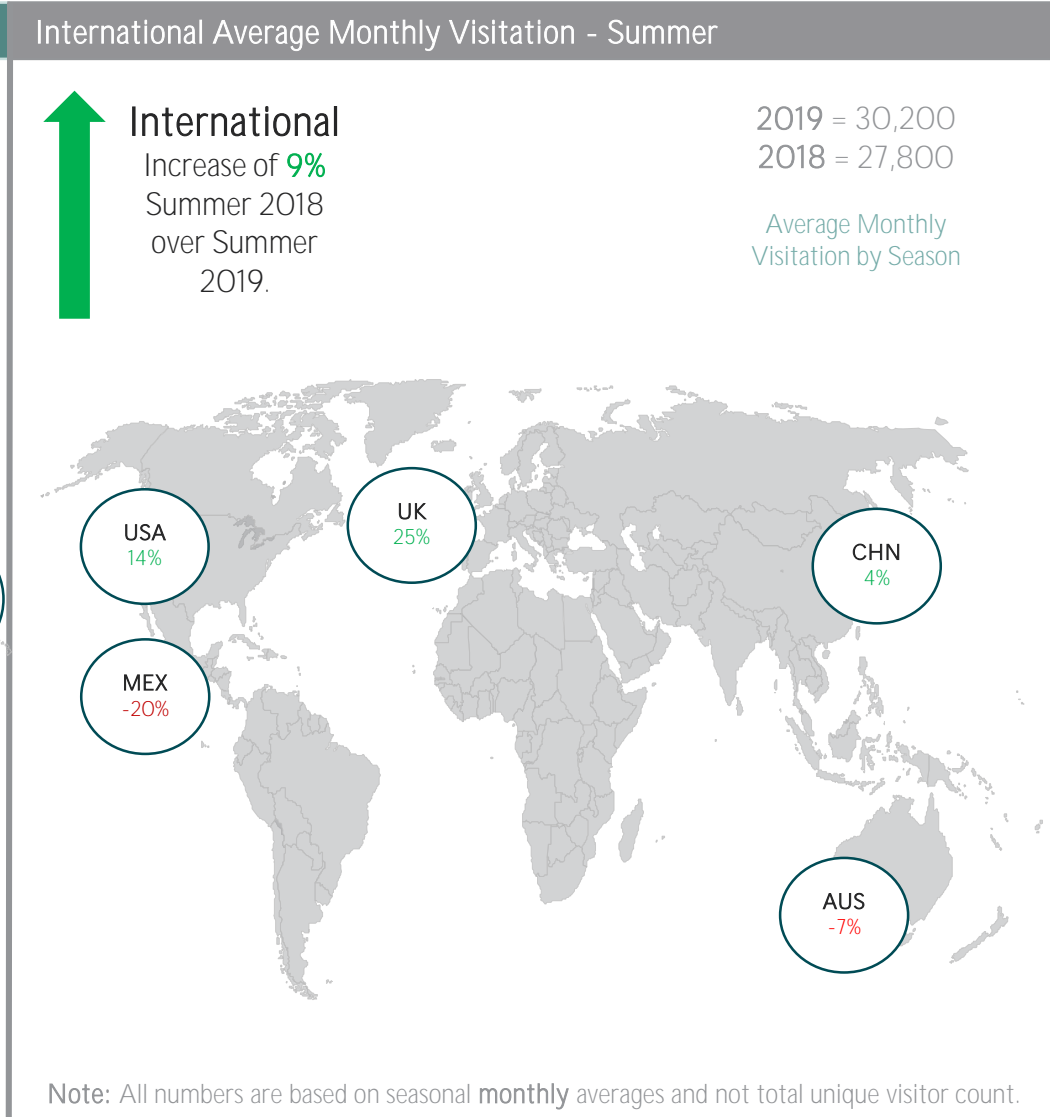
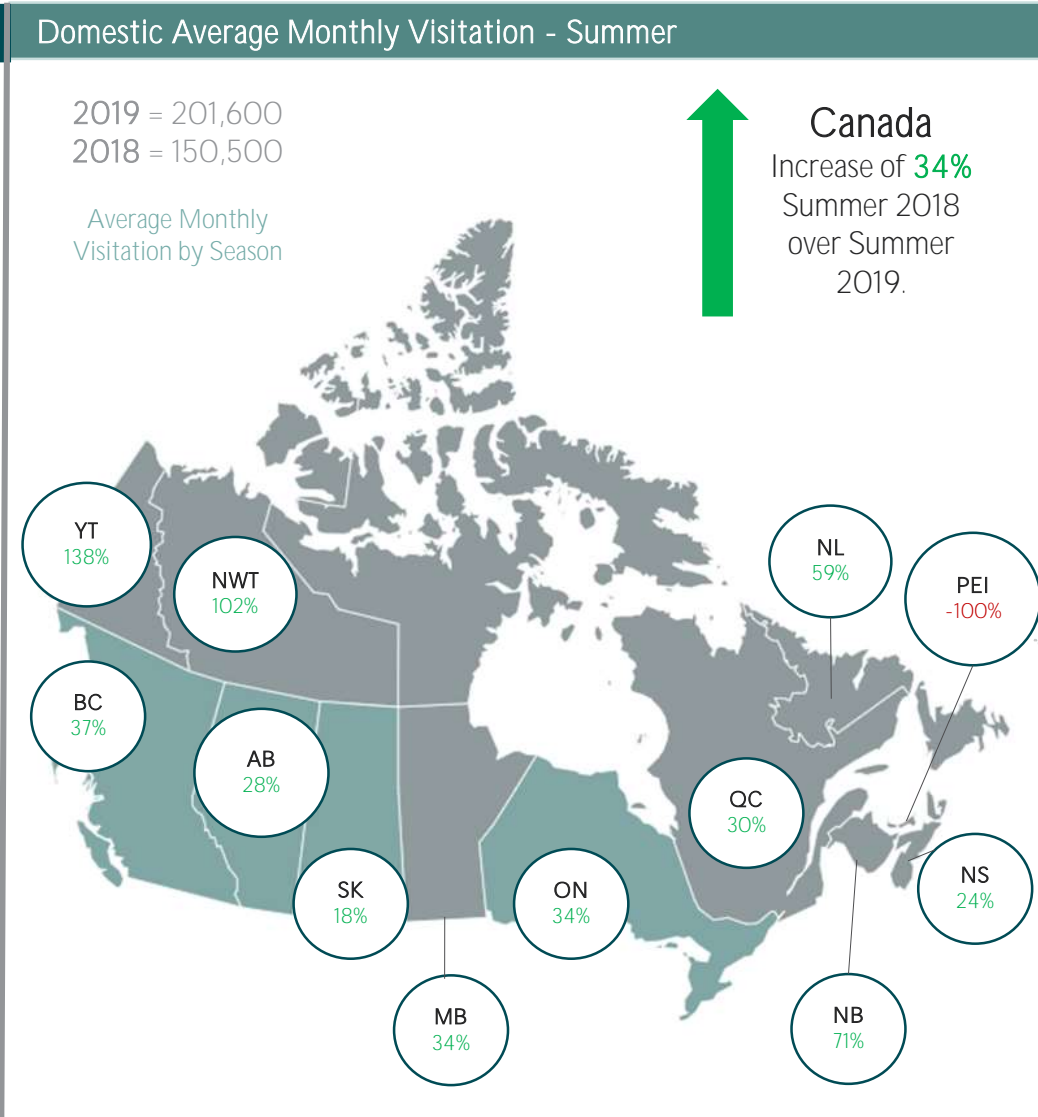


# Summer 2018 vs. Summer 2019: Domestic and International Average Monthly Visitation by Season

RDOS District

Summer = June | July | August

- ### Overview
- Throughout **Summer 2018** the RDOS District saw an average of **150,500 Domestic Unique Visitation per month**. During the same time period in **2019** the District saw an average of **201,600 Domestic Unique Visitation per month**, an increase of **34%** season over season, year over year.
  - The increase is consistent across all Provinces, with the exception of Prince Edward Island, down **100%** (Note: There was no ranking visitation from PEI in Summer 2019, resulting in a total decrease over Summer 2018) when comparing average monthly visitation in Summer 2018 and 2019.
  - Note:** there was no ranking average seasonal visitation from Nunavut in Summer 2018 or Summer 2019.
  - Throughout **Summer 2018** the RDOS District saw an average of **27,800 International Unique Visitation per month**. During the same time period in **2019** the District saw an average of **30,200 International Unique Visitation per month**, an increase of **9%** season over season, year over year.
  - The increase is consistent in the United States, the United Kingdom and China. Mexico decreased by **20%** and Australia decreased by **7%** when comparing average monthly visitation in Summer 2018 and 2019.



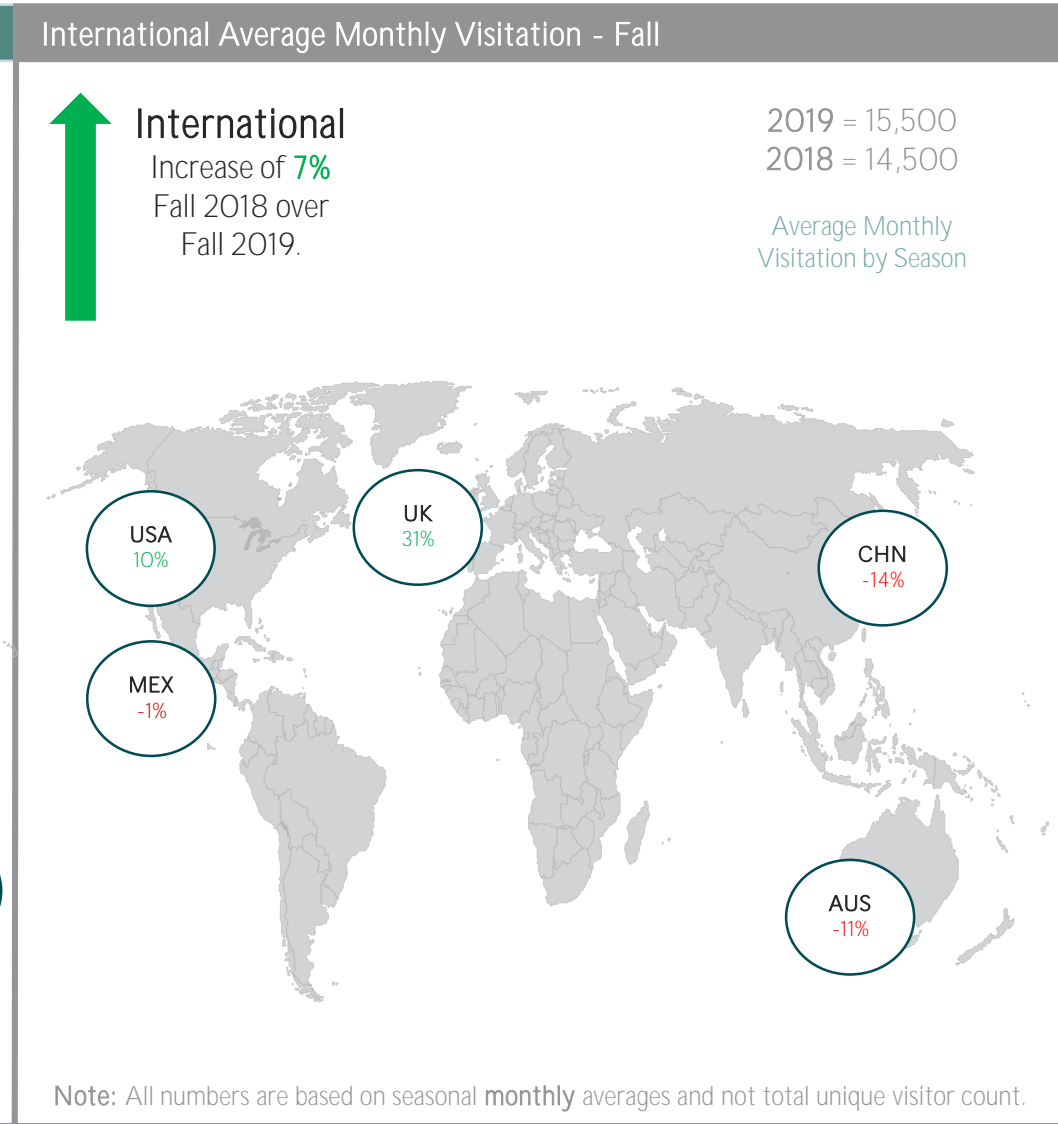
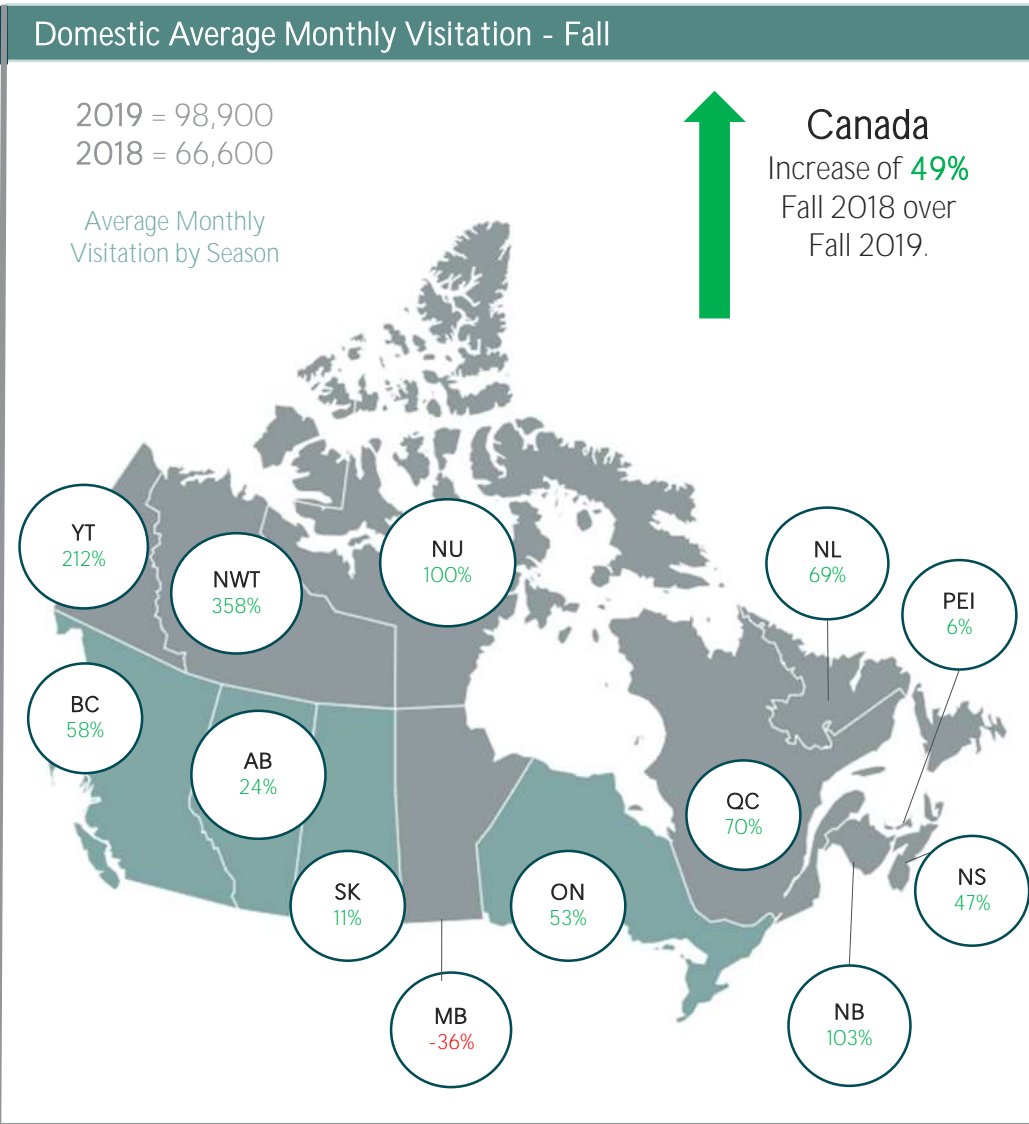
# Fall 2018 vs. Fall 2019: Domestic and International Average Monthly Visitation by Season

RDOS District

Fall = September | November | December

### Overview

- Throughout **Fall 2018** the RDOS District saw an average of **66,600 Domestic Unique Visitation per month**. During the same time period in **2019** the District saw an average of **98,900 Domestic Unique Visitation per month**, an increase of **49%** season over season, year over year.
- The increase is consistent across all Provinces, with the exception of Manitoba, down **36%** when comparing average monthly visitation in Fall 2018 and 2019.
- Note:** there was no ranking average seasonal visitation from Nunavut in Fall 2018, resulting in a total increase for Fall 2019.
- Throughout **Fall 2018** the RDOS District saw an average of **14,500 International Unique Visitation per month**. During the same time period in **2019** the District saw an average of **15,500 International Unique Visitation per month**, an increase of **7%** season over season, year over year.
- The increase is consistent for the United States and the United Kingdom. China decreased by **14%**. Australia by **11%** and Mexico by **1%** when comparing average monthly visitation in Fall 2018 and 2019.



\*All Percentages relate to an increase or decrease in Average Monthly Visitation Counts when comparing Fall (Sept, Oct, Nov) 2018 to Fall (Sept, Oct, Nov) 2019.

**Note:** Visitor Data provided by TELUS Insights **excludes** residents of the Thompson Okanagan Region. All data analyzed by TELUS Insights is de-identified and aggregated into large data pools to ensure privacy is protected at all times.

# Winter 2018 vs. Winter 2019: Domestic and International Average Monthly Visitation by Season

RDOS District

Winter 2018 = January, 2018 | February, 2018 | December, 2018  
 Winter 2019 = December, 2018 | January, 2019 | February, 2019

## Overview

- Throughout **Winter 2018** the RDOS District saw an average of **46,000 Domestic Unique Visitation per month**. During the same time period in **2019** the District saw an average of **43,100 Domestic Unique Visitation per month**, a decrease of **6%** season over season, year over year.
- The decrease is consistent for the following provinces: Newfoundland, down **100%** (Note: There was no ranking visitation from Newfoundland travellers in Winter 2019, resulting in a total decrease over Winter 2018), New Brunswick, down **55%**, BC, down **8%**, Alberta, down **7%**, Quebec, down **5%** and Saskatchewan, down **1%** when comparing average monthly visitation in Winter 2018 and 2019.
- Note:** there was no ranking average seasonal visitation from Nunavut in Winter 2018 or Winter 2019.
- Throughout **Winter 2018** the RDOS District saw an average of **9,400 International Unique Visitation per month**. During the same time period in **2019** the District saw an average of **8,200 International Unique Visitation per month**, a decrease of **13%** season over season, year over year.
- The decrease is consistent in Australia, down **1%** when comparing average monthly visitation in Winter 2018 and 2019.

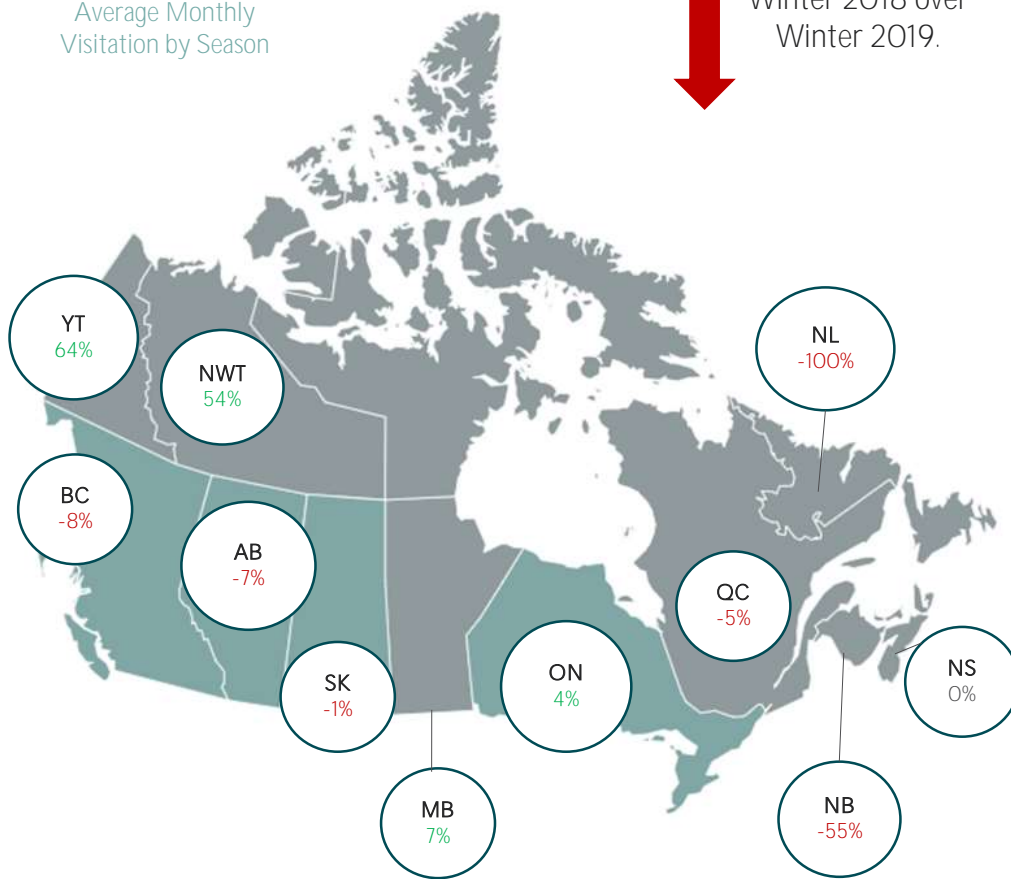
## Domestic Average Monthly Visitation - Winter

2019 = 43,100  
 2018 = 46,000

Average Monthly Visitation by Season



**Canada**  
 Decrease of **6%**  
 Winter 2018 over  
 Winter 2019.



## International Average Monthly Visitation - Winter

2019 = 8,200  
 2018 = 9,400

Average Monthly Visitation by Season



**International**  
 Decrease of **13%**  
 Winter 2018 over  
 Winter 2019.



Note: All numbers are based on seasonal monthly averages and not total unique visitor count.

\*All Percentages relate to an increase or decrease in Average Monthly Visitation Counts when comparing Winter (Jan, Feb, December 2018) to Winter (Dec 2018, Jan 2019, Feb 2019).



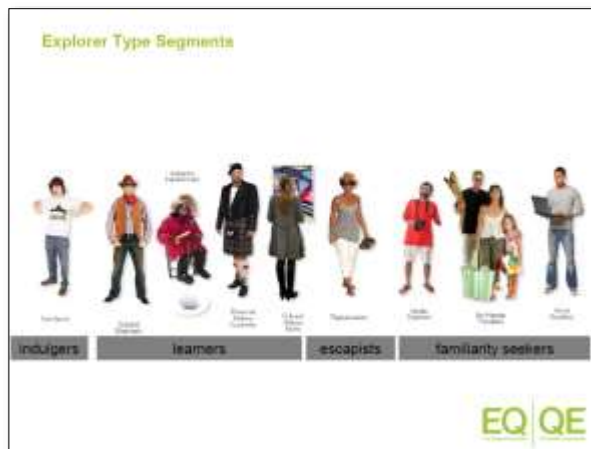
# ENVIRONICS ANALYTICS



## ABOUT ENVIRONICS ANALYTICS

- Environics Analytics is one of North America's leading data, analytics and marketing services companies.
- ENVISION5 provides insights into more than 30,000 variables including demographics, consumer preferences, lifestyles and values.
- Environics Analytics Research provides a deeper understanding of customers and markets through geographic analysis and customized segmentation.
- Market Reports Available for:
  - BC
  - Alberta
  - Ontario
  - United States





## ABOUT EQ

- Explorer Quotient, also known as EQ, was developed by Destination Canada in partnership with Environics Research Group.
- EQ is a proprietary market segmentation system based on the science of psychographics.
- EQ goes beyond traditional market research of defining people. It looks deeper at **individuals' personal beliefs, social values and views of the world** to learn exactly why different types of travellers seek out entirely different travel experiences.
- For more information visit: <https://www.destinationcanada.com/en/tools>

# APPLYING TELUS INSIGHTS TO ENVIRONICS ANALYTICS

- Using TELUS Insights counts by FSA and rolled up to the CSD/City level EQ Composition can be identified in Canada.
- Dominant EQ Types in the top three markets by BC, Alberta, Ontario are presented to aid in Target Marketing.
- Supporting EQ Market profiles provide demographics, psychographics, traditional and digital media habits for the Canadian Market.
- **Phase One** of the Research Analysis provides insights to determine marketing strategy and target markets.
- **Phase Two** of the Research Program provides custom services using Environics Analytics data sources based on your requirements such as:
  - Target Marketing by FSA – Direct to Agency
  - Sector (e.g. Hiking, Biking, Culinary)
  - Social Values (e.g. Global Consciousness, Multiculturalism)
  - Custom Variable Sets





## RESEARCH SERVICES

- Market Profiles (EnviroNics Analytics).
- Visitor Profiles (EnviroNics Analytics and/or TELUS Insights).
- Market Segmentation Targeting (EnviroNics Analytics and/or TELUS Insights).
- Digital Campaign Execution.
- Direct Marketing Strategy.
- Advertising Location Strategy.
- Additional TELUS Services based on your unique needs.



SYMPHONY  
TOURISM  
SERVICES

INSPIRED NAVIGATION

Contact: Simone Carlyle-Smith, Managing Director

Symphony Tourism Services, a subsidiary of the Thompson

Okanagan Tourism Association

778-721-5448

[sts@totabc.com](mailto:sts@totabc.com)

<https://www.totabc.org/symphony-tourism-services>