

TOTA COMMUNITY RESEARCH PROGRAM 2020

2019 VISITOR FSA ANALYSIS



ABOUT EMPLOYER QUOTIENT

- 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>

ENVIRONICS ANALYTICS



ABOUT ENVIRONICS ANALYTICS

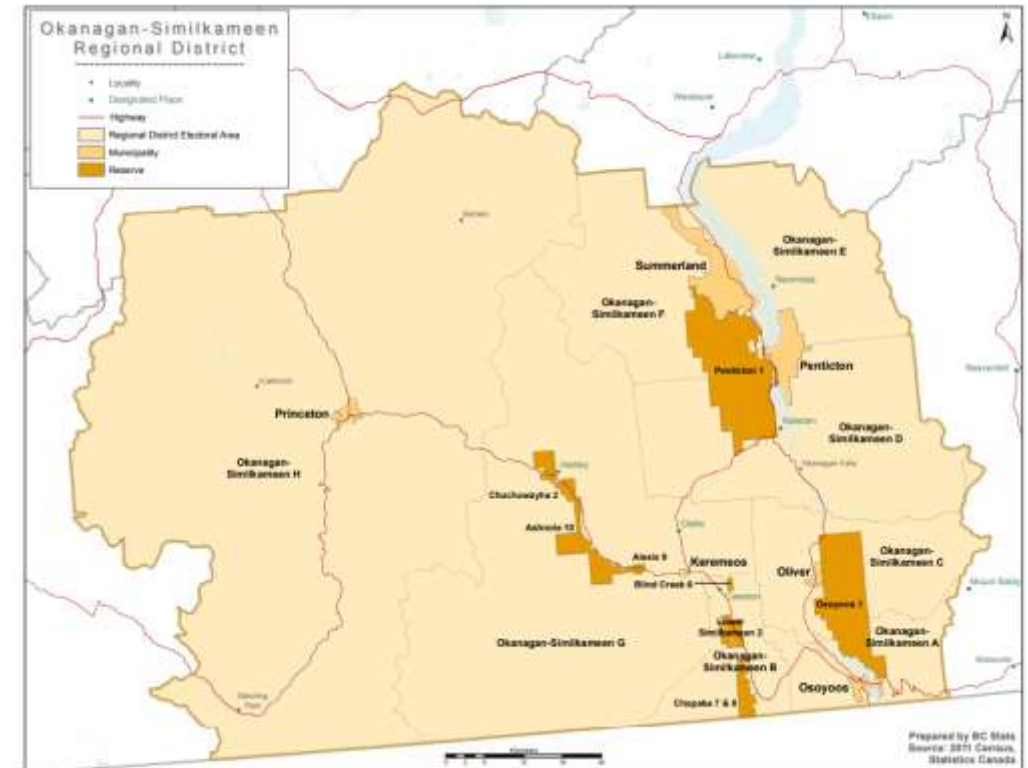
- Environics Analytics is one of North America's leading data, analytics and marketing services companies.
- ENVISION5 provides insights into more than 30,000 variables including demographics, consumer preferences, lifestyles and values.
- Environics Analytics Research provides a deeper understanding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

2019 VISITORS TO
REGIONAL DISTRICT
OKANAGAN SIMILKAMEEN
BY EXPLORER QUOTIENT

DISTRICT FSA ANALYSIS



- Visitor Origin profiles are created through an analysis of the Regional District Okanagan Similkameen (RDOS) **unique visitor origin** FSA's in British Columbia and Alberta as supplied by TELUS Insights
- The FSA's are “rolled up” and **averaged** at the CSD (City) level to determine top visitor origin by season within the RDOS district area, rounded to the nearest 100
- The top 5+ visitor origin CSD's from BC are profiled by Destination Canada's 9 Explorer Quotient (EQ Types)





DISTRICT FSA ANALYSIS – BRITISH COLUMBIA

Key Findings:

- The top 5 CSD’s in British Columbia based on **2019 Visitor Origin** to the RDOS District were: Vancouver, Surrey, Abbotsford, Chilliwack and Langley
- **Summer** was the top Season overall for visitor volume to the RDOS District from BC travellers
- **Authentic Experiencers, Free Spirits and Rejuvenators** were the dominant EQ Types across the majority of BC Visitor Origin Markets in 2019
- **V2R-Chilliwack** was the highest ranking visitor origin FSA overall from British Columbia, followed by **V2S-Abbotsford**

Top CSD’s (City) Areas of Visitor Origin by Season

CSD (City)	Average Monthly Visitation Spring	Average Monthly Visitation Summer	Average Monthly Visitation Fall	Average Monthly Visitation Winter
Vancouver	5,400	15,700	7,100	3,300
Surrey	4,300	12,900	6,700	2,300
Abbotsford	3,000	8,000	4,200	1,600
Chilliwack	2,900	7,700	4,300	1,800
Langley	2,900	8,000	3,900	1,700
Victoria	2,300	6,800	3,000	1,500
Nelson	2,000	2,500	2,200	1,400
Fruitvale	1,600	2,200	2,600	1,000
North Vancouver	1,500	5,100	2,800	800
Maple Ridge	1,500	4,600	2,200	800

Regional District Okanagan Similkameen (RDOS)– 2019 Visitor Origin Analysis



Chilliwack Target Area

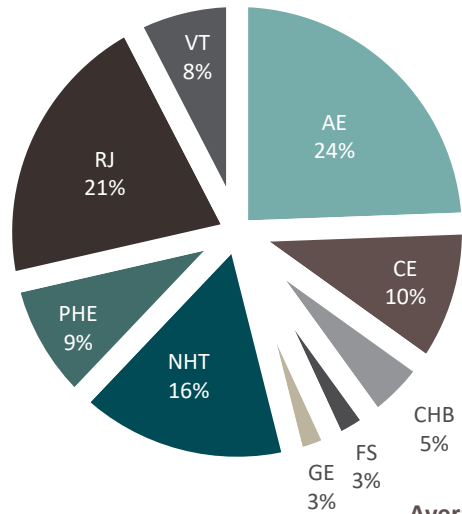
Overview

- The **Chilliwack Target Area** was created using monthly unique visitor origin FSA's as supplied by TELUS Insights, "rolled up" and averaged at the CSD (City) level.
- The **Chilliwack** Target Area was the fourth BC visitor origin location during Spring, the fifth during Summer and the third during Fall and Winter.
- The Chilliwack Market consists of **3** FSA's. Visitors to the RDOS district originate from all **3** of them.
- V2R** is the highest ranking visitor origin FSA, followed by **V2P** (Top FSA outlined on Map).
- Authentic Experiencers, Rejuvenators and No Hassle Travellers are the most prominent EQ Types within the **Chilliwack Target Area** at 24%, 21% and 16% respectively.

Average Monthly Market Share of Chilliwack Target Area

- Spring = 8%
- Summer = 20%
- Fall = 11%
- Winter = 5%

EQ Breakdown of Chilliwack Target Area

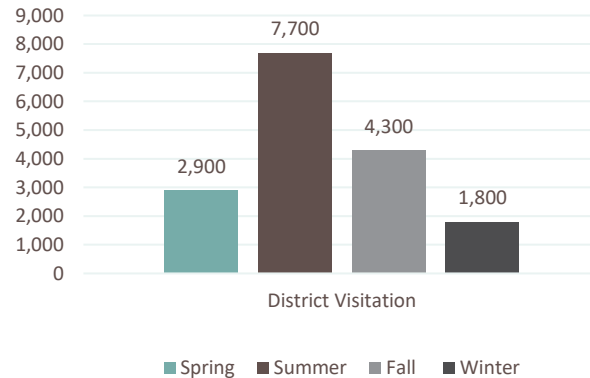


- Authentic Experiencers
- Cultural Explorers
- Cultural History Buffs
- Free Spirits
- Gentle Explorers
- No Hassle Travellers
- Personal History Explorers
- Rejuvenators
- Virtual Travellers

Chilliwack Target Area Market Size

38,271
(Household Count)

Average Monthly Visitation from Chilliwack Target Area by Season



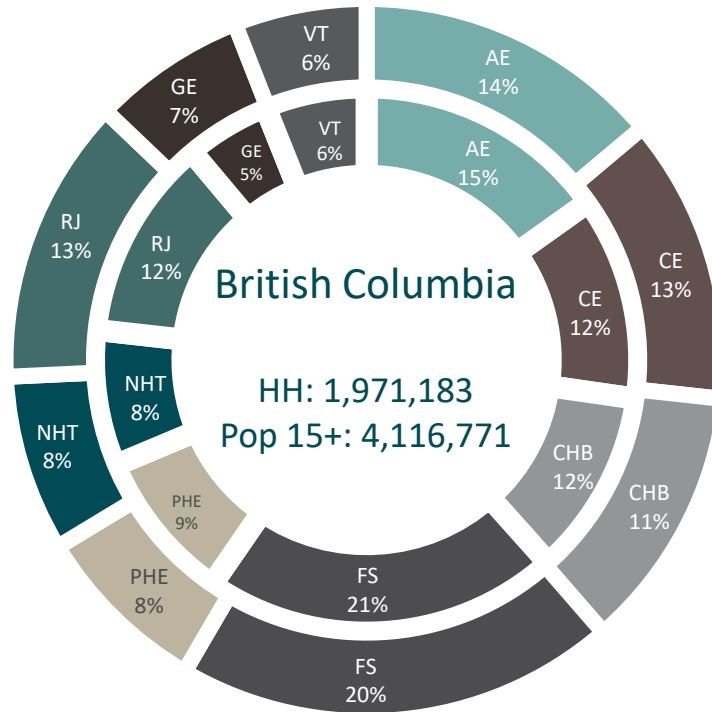
Top Seasonal FSA's by Average Monthly Visitor Origin Count from Chilliwack

FSA	Spring Average Visitation	Summer Average Visitation	Fall Average Visitation	Winter Average Visitation
V2R	1,700	4,600	2,600	1,000
V2P	1,200	2,900	1,600	700
V4Z	-	100	-	-





RDOS FSA ANALYSIS – BRITISH COLUMBIA



Outer Circle: Household Count
Inner Circle: Population 15+

Top EQ Types by Overall Visitor Origin CSD's

CSD (City)	Top EQ Type
Vancouver	Free Spirits (37%)
Surrey	Free Spirits (34%)
Abbotsford	Authentic Experiencers (33%)
Chilliwack	Authentic Experiencers (24%)
Langley	Authentic Experiencers (38%)
Victoria	Cultural History Buffs (29%)
Nelson	Rejuvenators (35%)
Fruitvale	Rejuvenators (78%)
North Vancouver	Free Spirits (27%)
Maple Ridge	Authentic Experiencers (39%)

RDOS District 2019 Seasonal Year in Review – British Columbia

Domestic Average Monthly Visitation

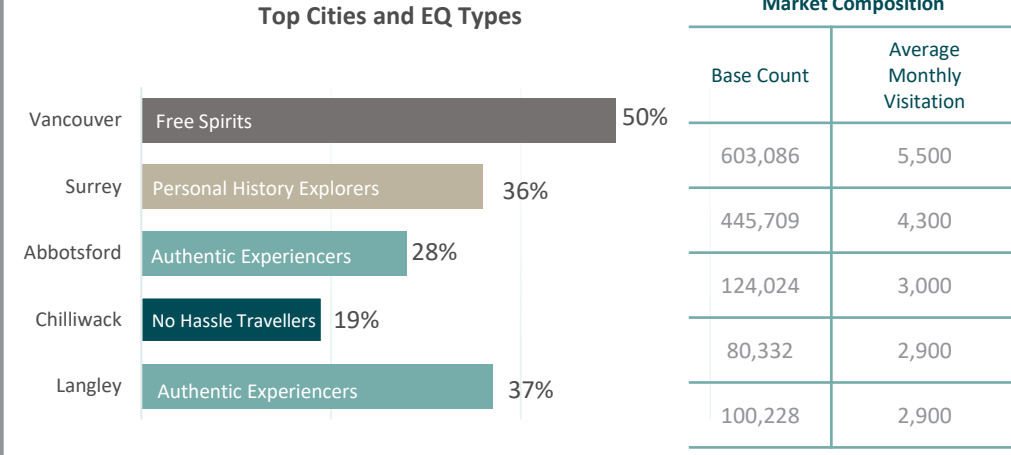
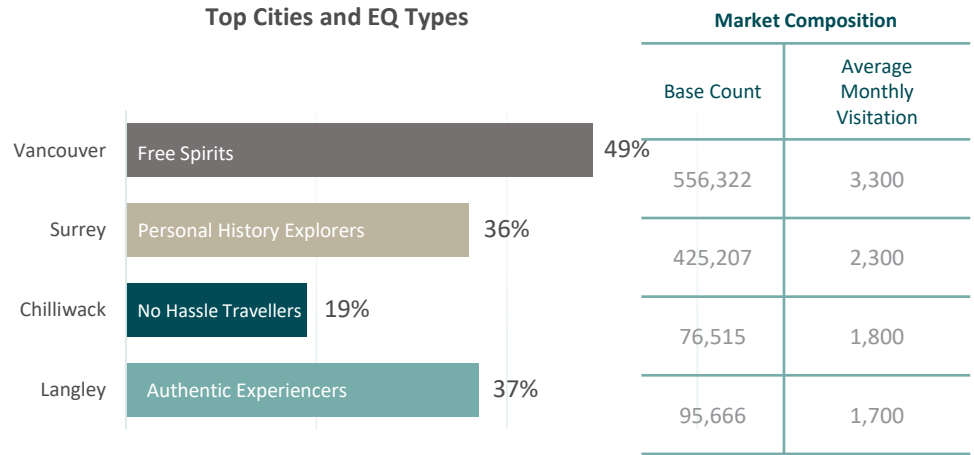


Overview

❄️ Winter (December 2018, January, February 2019)

🌸 Spring (March, April, May)

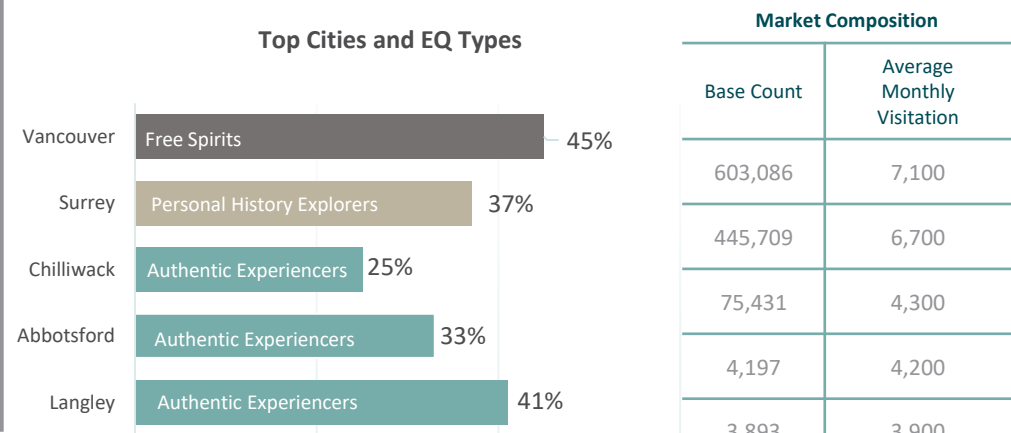
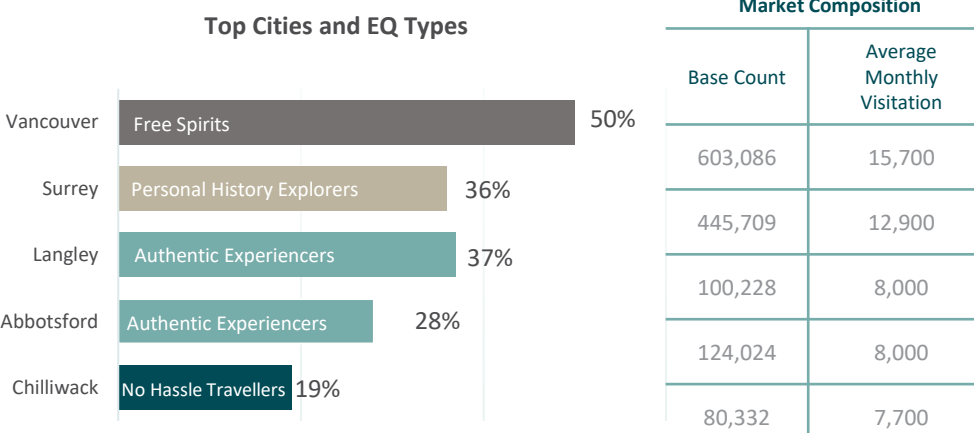
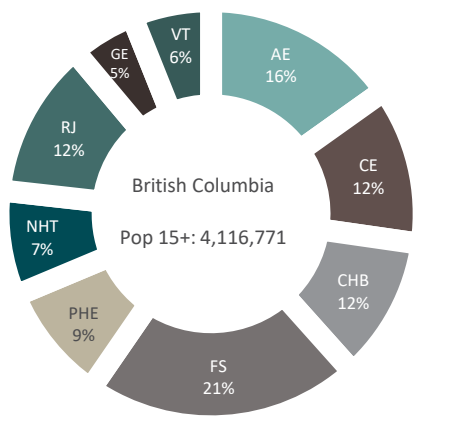
- The Peak season for average monthly BC visitation in 2019 is **Summer**, followed by Fall, Spring and Winter.
- Vancouver** dominates in visitor origin across all four seasons.
- Free Spirits** from Vancouver are the top EQ Type across all seasons.
- Personal History Explorers** from Surrey represent 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 100th 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.

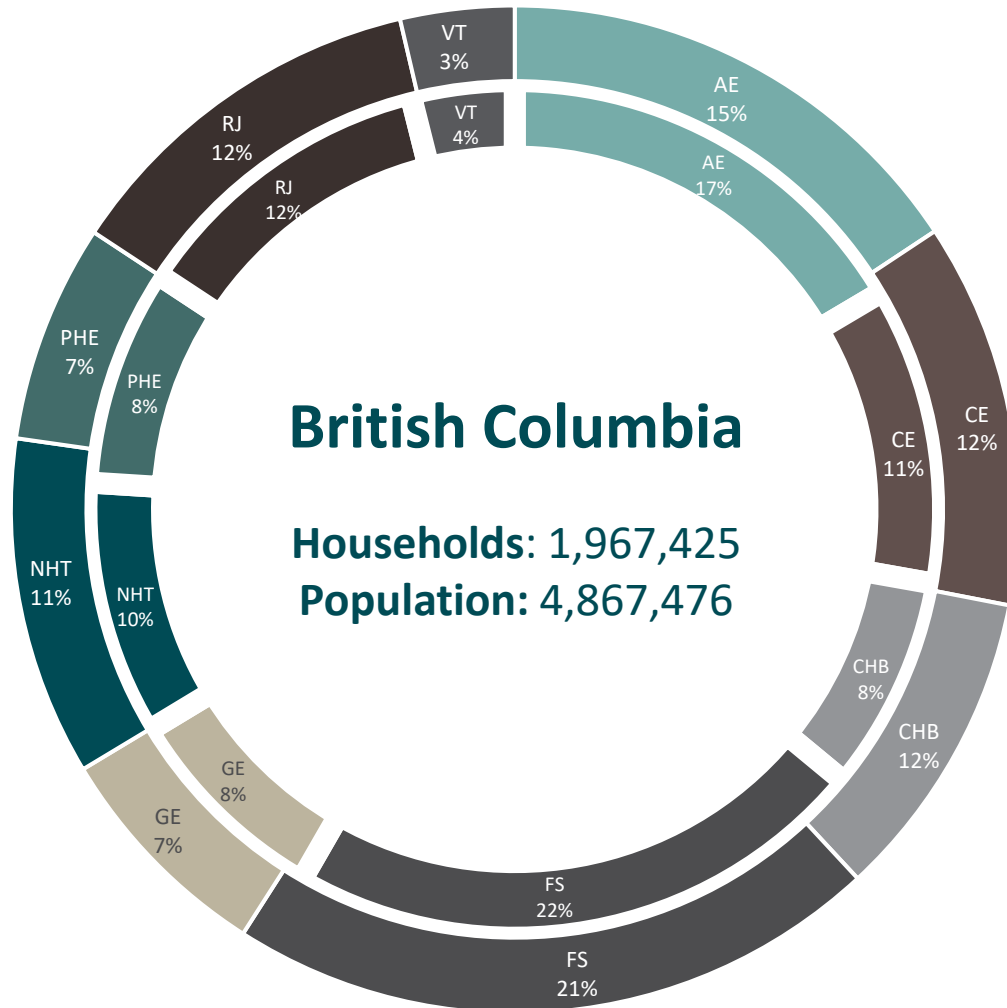


EXPLORER QUOTIENT MARKET SUMMARY BC





BRITISH COLUMBIA EQ COMPOSITION



EQ Type	Household Count	Population
Free Spirits (FS)	412,845	1,085,754
Authentic Experiencers (AE)	308,603	802,638
Cultural Explorers (CE)	243,215	550,378
Rejuvenators (RJ)	237,540	574,867
No Hassle Travellers (NHT)	213,998	470,142
Cultural History Buffs (CHB)	197,400	399,391
Gentle Explorers (GE)	143,831	391,125
Personal History Explorers (PHE)	137,888	402,330
Virtual Travellers (VT)	72,105	190,851

- Authentic Experiencers
- Cultural Explorers
- Cultural History Buffs
- Free Spirits
- Personal History Explorers
- No Hassle Travellers
- Rejuvenators
- Gentle Explorers
- Virtual Travellers

Outer Circle: Households
Inner Circle: Population

Refer to BC EQ Profiles for additional information



EXPLORER QUOTIENT (EQ) SUMMARY

FREE SPIRITS

General Canadian Summary:

- Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel.
- Experimental and adventurous, they indulge in high-end experiences that are shared with others.
- They tend to be young, experimentalist, committed travellers looking for thrills and frills.
- They live the travel experience to the fullest.
- They seek some structure when they travel so they can indulge in worry-free hedonistic activities.
- They enjoy the best they can afford in terms of accommodations and restaurants.



Category	British Columbia Highlights
Household Count	• Free Spirits make up 412,845 or 21% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	• Established Families • Ethnically diverse, well educated families that earn moderate incomes; living in urban and suburban areas
Maintainer Age	• 59% are below the age of 54 • Above Average for the 15-24, 35-44 and 45-54 Age Ranges compared to BC
Children at Home	• 45% have Children at Home
Ethnic Diversity	• Above Average Ethnic Diversity of 64% compared to BC at 33%
Household Income	• Average Household Income of \$102,111 compared to BC at \$105,535

- Refer to BC EQ Profiles for additional Information.
- Source: Environics Analytics

Source: Destination Canada EQ 2 Reference Document





EXPLORER QUOTIENT (EQ) SUMMARY

AUTHENTIC EXPERIENCERS

General Canadian Summary:

- Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.
- They tend to be older, highly educated and adventurous.
- They relish experiencing all their travel destination has to offer in a reserved and non-exorbitant way.
- They are drawn to nature and are likely to seek it out far and wide. Travel is an important part of their lives, so they are likely to go often and for a while.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • Authentic Experiencers make up 308,603 or 16% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Established Families • Affluent, highly educated mature singles and couples with older children; living in urban and suburban neighbourhoods
Maintainer Age	<ul style="list-style-type: none"> • 72% are over the age of 45 • Above Average for the 65-74 and 74+ Age Ranges compared to BC
Children at Home	<ul style="list-style-type: none"> • 40% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Below Average Ethnic Diversity of 16% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Above Average Household Income of \$132, 350 compared to BC at \$105,535

- Refer to BC EQ Profiles for additional Information.

- Source: Environics Analytics



EXPLORER QUOTIENT (EQ) SUMMARY

CULTURAL EXPLORERS

General Canadian Summary:

- Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.
- They are avid, open-minded and socially-engaged global travellers, who seek spontaneous and authentic experiences.
- They prefer to make their own plans as they go, rather than stick to predetermined schedules.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • Cultural Explorers make up 243,215 or 12% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Young Singles and Couples • Young, highly educated diverse singles and couples without children at home; living in urban neighbourhoods
Maintainer Age	<ul style="list-style-type: none"> • 43% are below the age of 45 • Above Average for the 15-24 and 25-34 Age Ranges compared to BC
Children at Home	<ul style="list-style-type: none"> • 31% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Average Ethnic Diversity of 28% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Average Household Income of \$112,755 compared to BC at \$105,535

• Refer to BC EQ Profiles for additional Information.

• Source: Environics Analytics



EXPLORER QUOTIENT (EQ) SUMMARY

REJUVENATORS

General Canadian Summary:

- Rejuvenators are family-oriented people who travel with others to escape from the stresses of everyday life, be pampered, and indulge themselves.
- They are busy, family-oriented Canadians/Americans seeking a relaxing escape, typically within Canada and the US.
- They enjoy sharing travel with others (friends or family) and prefer it to be a time for understated indulgence and relaxation, away from their burdens and responsibilities at home.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • Rejuvenators make up 237,540 or 12% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Mature Singles and Couples • Mature singles and empty nesters; have lower levels of educational attainment and earn below average incomes
Maintainer Age	<ul style="list-style-type: none"> • 55% are above the age of 55 • Above Average for the 45-54, 55-64 and 75+ Age Ranges compared to BC
Children at Home	<ul style="list-style-type: none"> • 32% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Below Average Ethnic Diversity of 7% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Average Household Income of \$90,734 compared to BC at \$105,535

- Refer to BC EQ Profiles for additional Information.
- Source: Environics Analytics

Source: Destination Canada EQ 2 Reference Document





EXPLORER QUOTIENT (EQ) SUMMARY

NO HASSLE TRAVELLERS

General Canadian Summary:

- No-Hassle Travellers are cautious, dutiful and reserved people who seek secure group travel that allows them to escape from the duties and obligations of everyday life.
- They are average Canadians/Americans leading busy lives, understated and cautious with spending money.
- They favour nature and worry-free vacations, but also enjoy the cultural highlights of their destinations.
- They prefer quiet weekend getaways close by.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • No Hassle Travellers make up 213,998 or 11% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Mature Empty Nesters • Mature singles and couples, without many children at home, who are in or nearing retirement
Maintainer Age	<ul style="list-style-type: none"> • 63% are above the age of 55 • Above Average for the 65-74 and 75+ Age Ranges compared to BC
Children at Home	<ul style="list-style-type: none"> • 29% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Below Average Ethnic Diversity of 9% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Average Household Income of \$102,483 compared to BC at \$105,535

- Refer to BC EQ Profiles for additional Information.

- Source: Environics Analytics



EXPLORER QUOTIENT (EQ) SUMMARY

CULTURAL HISTORY BUFFS

General Canadian Summary:

- Cultural History Buffs are life-long learners who seek the quiet discovery of the cultural and historical aspects of their destinations.
- They tend to be highly educated, and often single.
- They like to travel alone or with one other.
- They have a high propensity for international travel.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • Cultural History Buffs make up 197,400 or 10% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Young Singles and Couples • Young, educated singles and couples; earning below-average incomes
Maintainer Age	<ul style="list-style-type: none"> • 47% are below the age of 45 • Above Average for the 15-24 and 25-34 and 35-44 Age Ranges compared to BC
Children at Home	<ul style="list-style-type: none"> • 27% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Average Ethnic Diversity of 28% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Average Household Income of \$89,317 compared to BC at \$105,535

• Refer to BC EQ Profiles for additional Information.

• Source: Environics Analytics



EXPLORER QUOTIENT (EQ) SUMMARY

GENTLE EXPLORERS

General Canadian Summary:

- Gentle Explorers are primarily defined by their reluctance to venture far beyond the comfort of home.
- They travel 'on condition', demanding the very best and most comfortable environments for themselves when they must do so.
- They are apprehensive travellers who prefer the tried and true over discovering new destinations and cultures.
- They prefer creature comforts and the security of group travel.
- Travel is an opportunity to act more vividly and spontaneously than when at home.



Category	British Columbia Highlights
Household Count	• Gentle Explorers make up 143,831 or 7% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	• Middle-Aged Families • Middle-class families with children at home; higher rates of 4+ persons at home; below average rates of Travel
Maintainer Age	• 34% are between the ages of 35-54 • Above Average for the 45-54 Age Range compared to BC
Children at Home	• 45% have Children at Home
Ethnic Diversity	• Above Average Ethnic Diversity of 46% compared to BC at 33%
Household Income	• Average Household Income of \$114,395 compared to BC at \$105,535

• Refer to BC EQ Profiles for additional Information.

• Source: Environics Analytics



EXPLORER QUOTIENT (EQ) SUMMARY

PERSONAL HISTORY EXPLORERS

General Canadian Summary:

- As travellers, Personal History Explorers are primarily defined by their desire to connect to their own cultural roots, and do so by travelling in comfort, style and security.
- They are a more culturally diverse group.
- They are social people who enjoy being with others when travelling and favour group travel.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • Personal History Explorers make up 137,888 or 7% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Mixed Families • Diverse families living in both urban and rural areas; lower levels of educational attainment and earning below-average incomes.
Maintainer Age	<ul style="list-style-type: none"> • 39% are below the age of 44 • Above Average for the 15-24 and 35-44 Age Ranges compared to BC
Children at Home	<ul style="list-style-type: none"> • 44% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Above Average Ethnic Diversity of 60% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Average Household Income of \$87,524 compared to BC at \$105,535

• Refer to BC EQ Profiles for additional Information.

• Source: Environics Analytics



EXPLORER QUOTIENT (EQ) SUMMARY

VIRTUAL TRAVELLERS

General Canadian Summary:

- Virtual Travellers are highly reluctant travellers who travel only when they must, and typically just to visit friends or relatives.
- For Virtual Travellers, travelling is a chore, not an experience to be enjoyed.
- They are fearful of change and complexity in their lives and like to maintain control when travelling.
- They are highly unlikely to venture far from home.



Category	British Columbia Highlights
Household Count	<ul style="list-style-type: none"> • Virtual Travellers make up 72,105 or 4% of the Households in British Columbia (1,967,425)
General (Canadian) Life Stage Description	<ul style="list-style-type: none"> • Mixed Families • Middle-aged families with lower levels of educational attainment; living outside of urban Areas
Maintainer Age	<ul style="list-style-type: none"> • 58% are between the ages of 35-64 • Above Average for the 55-64 Age Range compared to BC
Children at Home	<ul style="list-style-type: none"> • 40% have Children at Home
Ethnic Diversity	<ul style="list-style-type: none"> • Below Average Ethnic Diversity of 7% compared to BC at 33%
Household Income	<ul style="list-style-type: none"> • Average Household Income of \$104,999 compared to BC at \$105,535

- Refer to BC EQ Profiles for additional Information.

- Source: Environics Analytics

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Contact: Simone Carlisle-Smith, Tourism Services Provider
Similkameen Valley Planning Society info@simonecs.com