



TOTA COMMUNITY RESEARCH PROGRAM 2020

2019 RDOS ALBERTA VISITOR FSA ANALYSIS BY
PRIZM SEGMENT

RESEARCH OVERVIEW

- Environics Analytics classifies Canada's neighbourhoods into 67 unique lifestyle types by integrating geographic, demographic and psychographic data to form the PRIZM database
- These segments can be used to better understand and communicate with your ideal customer

ENVIRONICS
ANALYTICS

All research queries are supported by detailed reports that summarize the following information:

- Top Geographic Markets
- Demographic Profiles
- Psychographic Profiles
- Key Social Values
- Key Tourism Activities
- Travel Profile (Vacation Spending, Booking, Travel Type and Frequency)
- Accommodation, Airline and Car Rental preferences
- Media Usage (Traditional and Social Media)
- Product Preferences (Food and Beverage)

INTRODUCTION

- The **Thompson Okanagan Tourism Association (TOTA)** through its commercial division **Symphony Tourism Services (STS)** provides custom research, marketing and consulting services to the Tourism Industry.



**SYMPHONY
TOURISM
SERVICES**
INSPIRED NAVIGATION

Visitor Profiles

Target Markets

Comparative
Analysis

Agency Campaign
Execution

Marketing Strategy

Media Habits

Product and
Experience Design

Analysis and
Visualization

Website & Social
Channel Content

Market
Segmentation
Analysis

Tactical Marketing
Plan

Campaign Planning

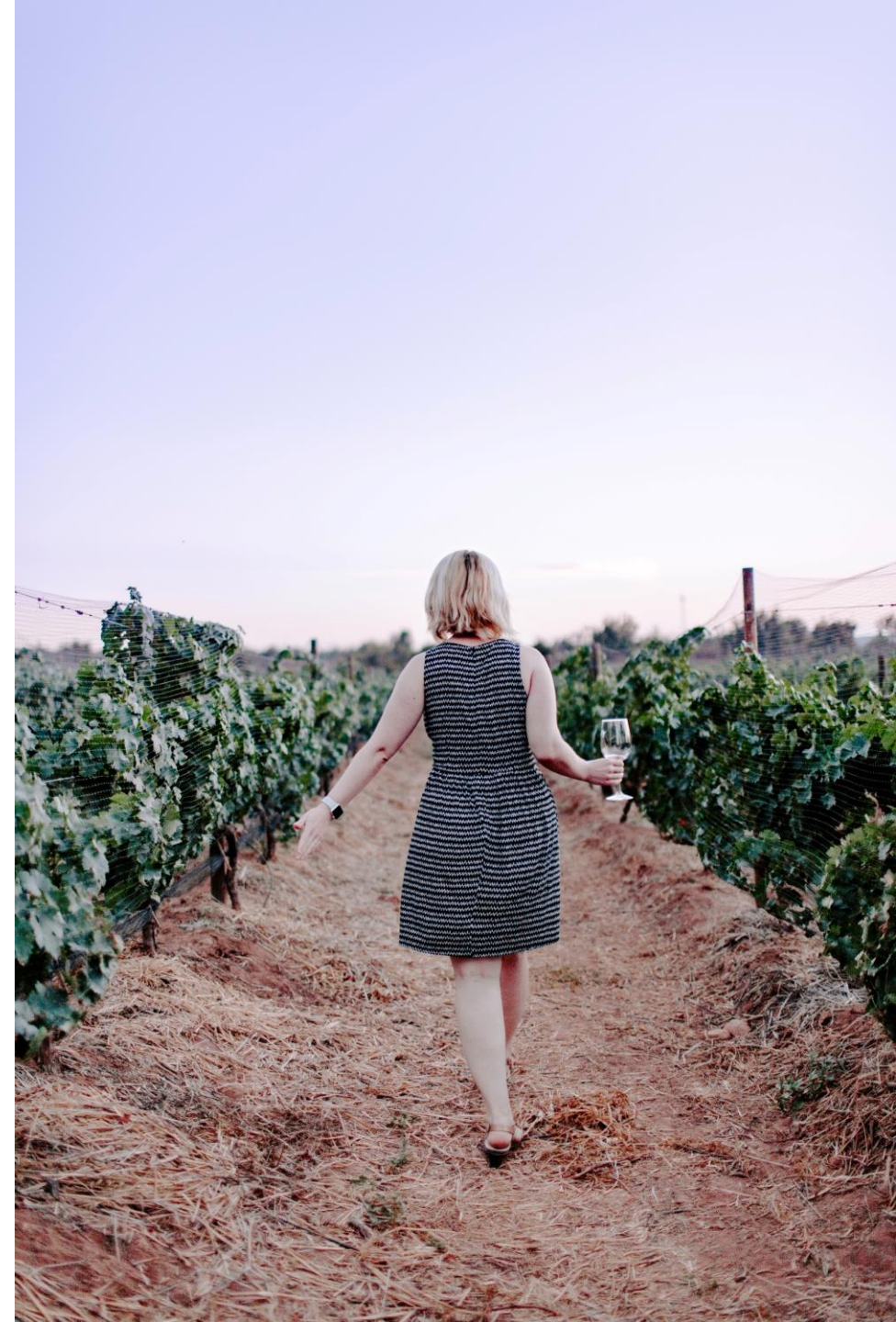


OBJECTIVES

- To provide market segmentation analysis of highest visitor volume to your district, using TELUS Insights as a baseline.
- To provide market research for destination stewardship, strategic planning, target marketing and plan implementation.

RESEARCH OVERVIEW

- The following research consists of both Visitor and Market Research utilizing data from TELUS Insights and Environics Analytics.
- Data excludes residents of the Thompson Okanagan.
- FSA Data is profiled using **Monthly Unique Counts**, averaged across the season and rounded to the nearest 100.
- Market information is available by: Province, City and FSA
- Top Visitor Origin FSA's (First three characters of a postal code) by visitor count have been "rolled up" to the City level to profile Market Data by Environics Analytics PRIZM Segments
- Additional Market Data can also be profiled by:
 - Sector (e.g. Hiking, Biking, Culinary)
 - Social Values (e.g. Global Consciousness, Multiculturalism)
 - Custom Variable Sets
 - Custom Geo-Profiles by your top markets





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
 - Or Email: 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

RDOS DISTRICT
ALBERTA FSA ANALYSIS BY
2020 PRIZM SEGMENTS

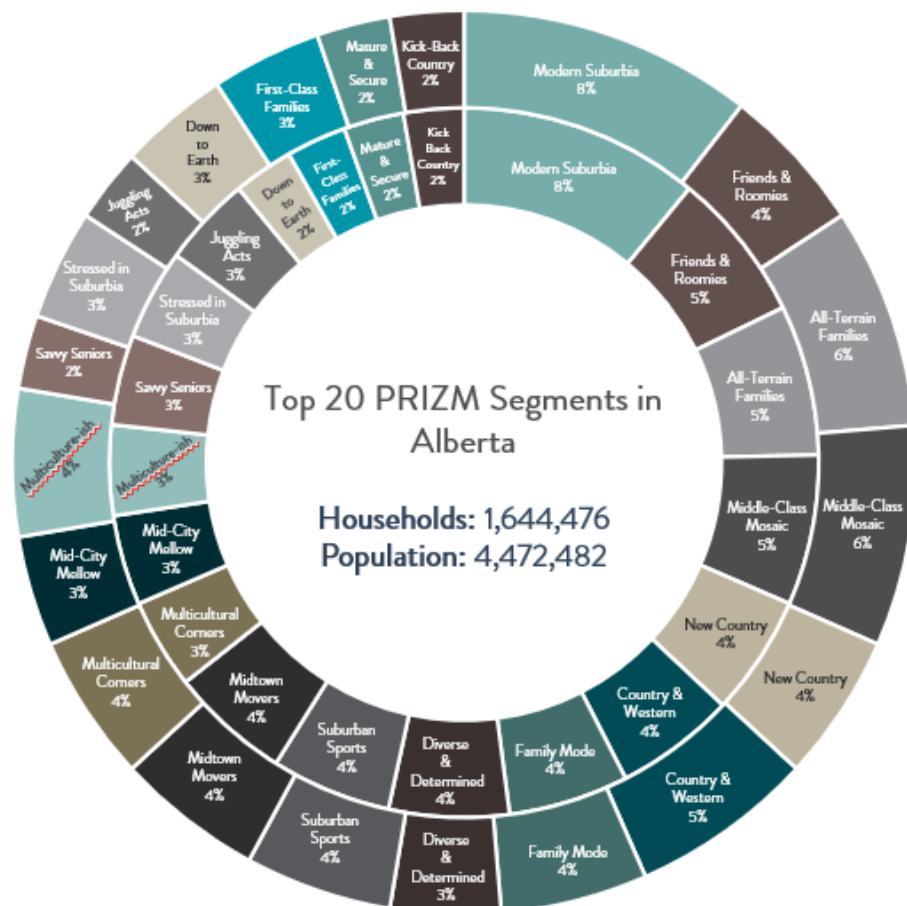


RDOS DISTRICT FSA ANALYSIS

TOP PRIZM SEGMENTS BY VISITOR ORIGIN CSD'S

Top PRIZM Segments by Overall Visitor Origin CSD's

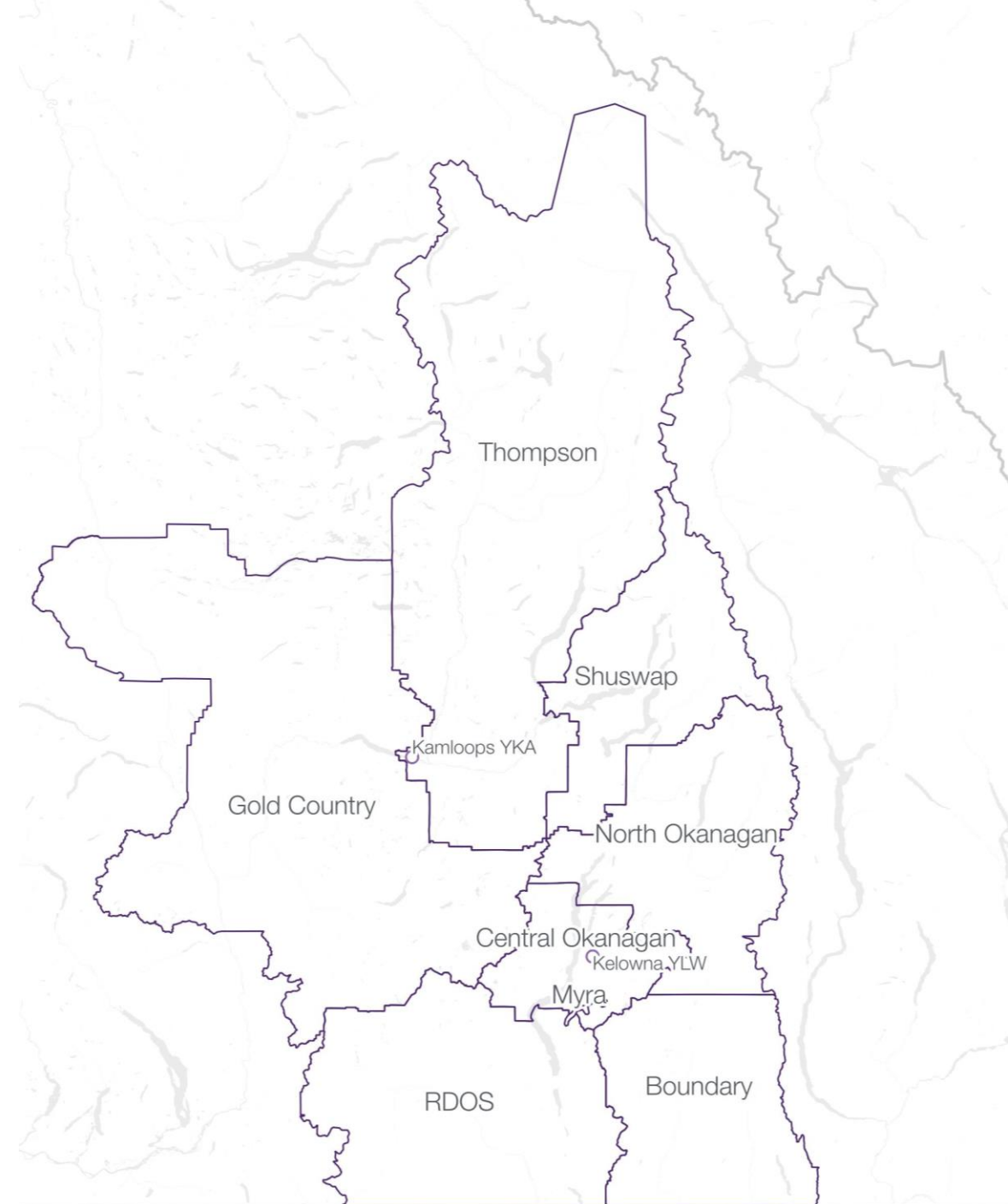
CSD (City)	TOP PRIZM Segment
Calgary	Modern Suburbia (10%)
Edmonton	Modern Suburbia (16%)
La Crete Area	Country & Western (73%)
Fort McMurray	Suburban Sports (23%)
Grande Prairie	All-Terrain Families (27%)



Outer Circle: Population
 Inner Circle: Households

DISTRICT FSA ANALYSIS

- Visitor Origin profiles are created through an analysis of the RDOS District **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 and Alberta are profiled by the Top ranking Environics Analytics **PRIZM Segments**
- Deliverables include up to 20 17-page custom geo-profiles including demographics, psychographics and media habits (Traditional and Social) and corresponding Postal Codes for Target Marketing

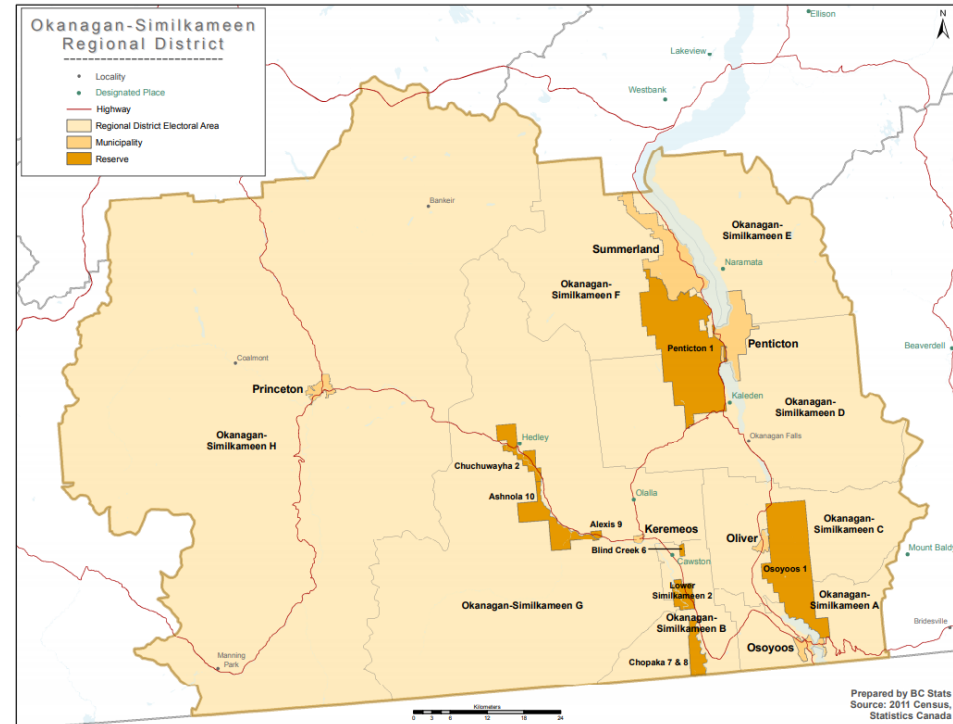


Regional District Okanagan Similkameen (RDOS) District



2019 Alberta Visitor FSA Analysis by PRIZM
Segment

October 2020



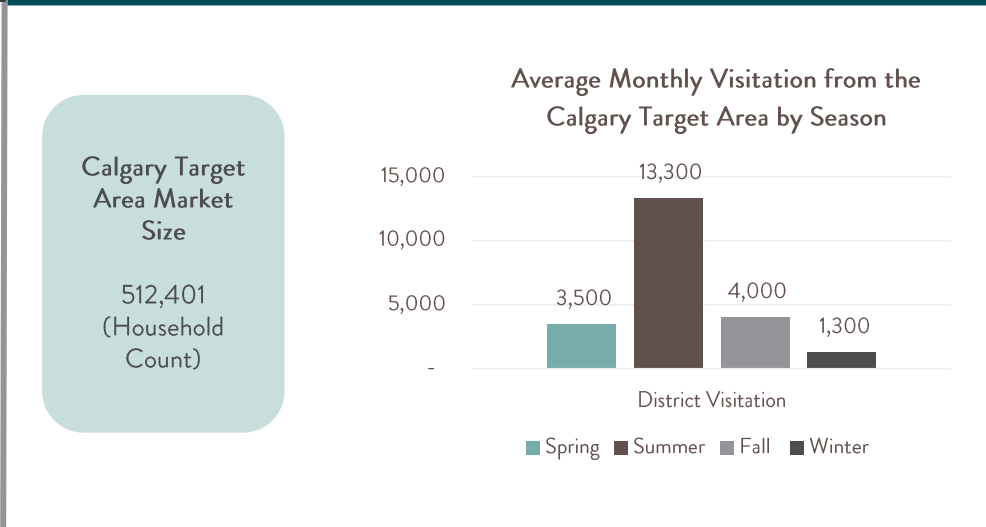
RDOS District – 2019 Visitor Origin Analysis by PRIZM Segment

Calgary Target Area

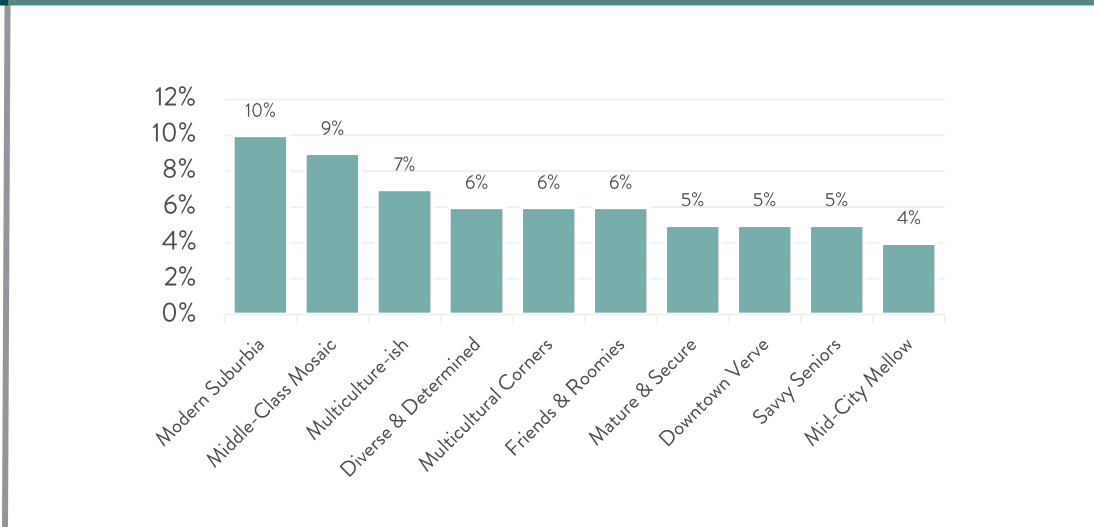


Overview

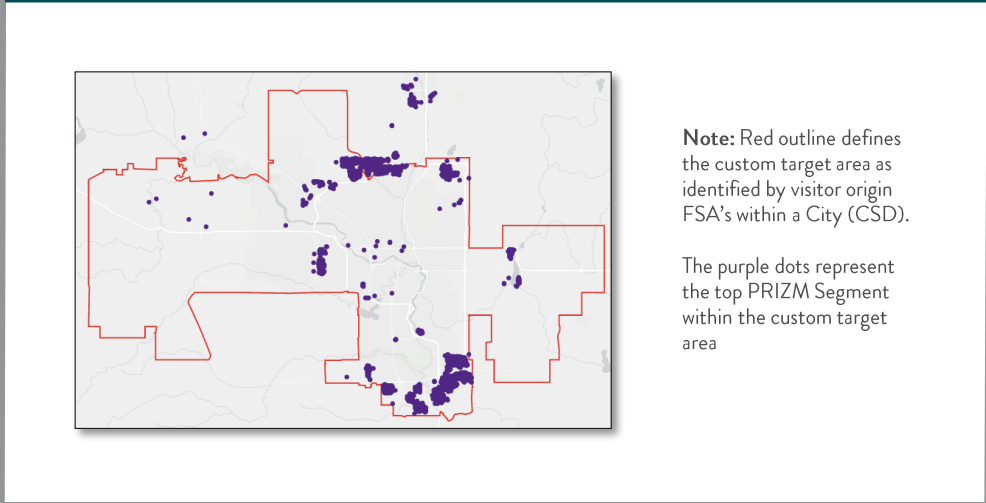
Calgary Target Area Market Size and Average Monthly Visitation



Top 10 PRIZM Segment Breakdown in Calgary Target Area



Top PRIZM Segment in Calgary Target Area – Modern Suburbia



Category	Custom Calgary Target Area PRIZM Highlight
Household Count	Modern Suburbia make up 49,301 households, or 9.6% of the total Households in the Custom Calgary target area (512,401)
Maintainer Age	Median Household Maintainer Age is 41
Children at Home	59% of couples have children living at home
Household Income	Average Household Income of \$140,212 compared to the Custom Calgary target area at \$139,958
Top Social Value	Confidence in Advertising: A tendency to trust and use advertising as a source of reliable information. Also, a tendency to identify with the fashions and the role models promoted by advertising and the consumer society
Media Habits	<ul style="list-style-type: none"> 11hrs/week listening to the Radio, 18hrs/week watching TV, 0hr/week reading the Newspaper and 4.6hrs/day on the Internet. Daily Magazine usage is minimal (4 min/day) 76% currently use Facebook, 48% use Instagram and 37% use Twitter

CSD = Census Subdivision (City) Level of Geography
FSA = Forward Sortation Area – First three characters of a postal code



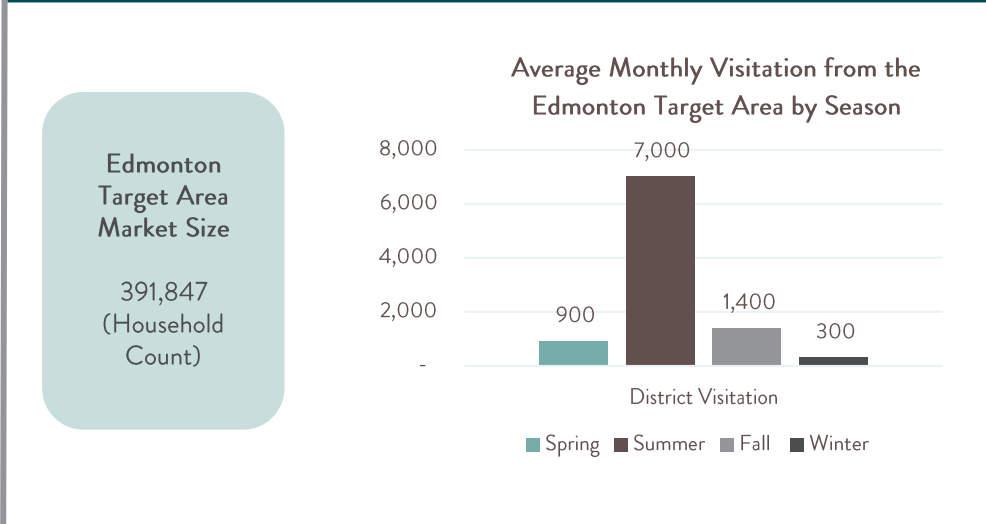
RDOS District – 2019 Visitor Origin Analysis by PRIZM Segment

Edmonton Target Area

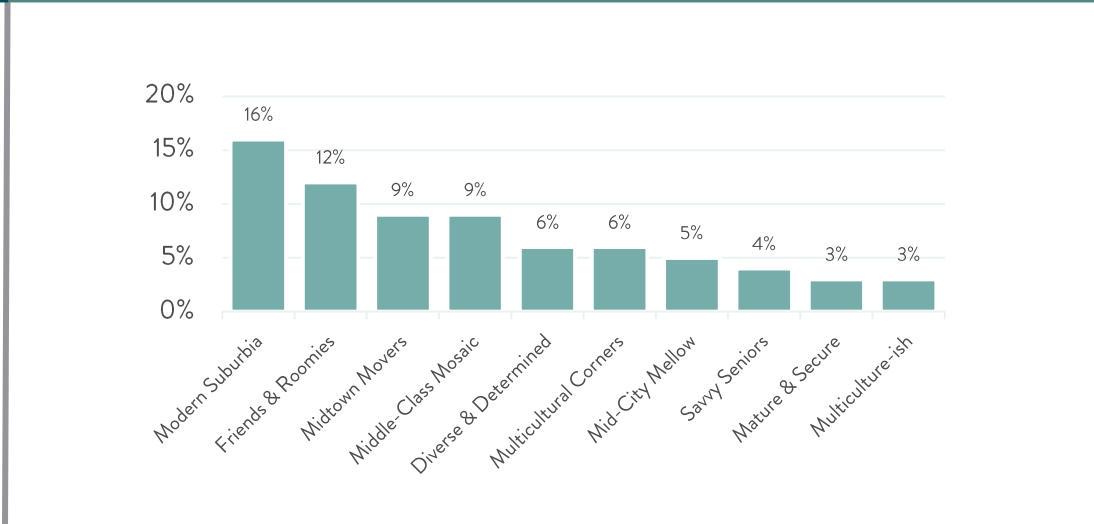


Overview

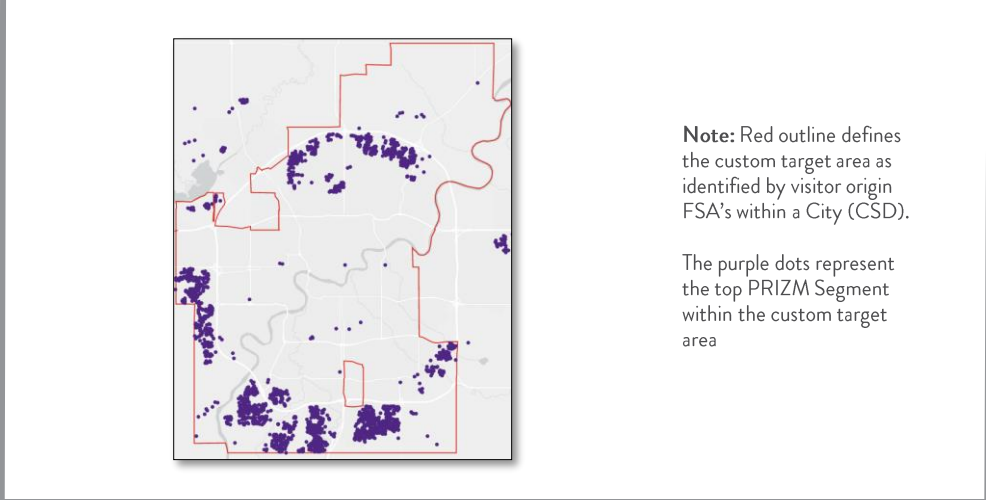
Edmonton Target Area Market Size and Average Monthly Visitation



Top 10 PRIZM Segment Breakdown in Edmonton Target Area



Top PRIZM Segment in Edmonton Target Area – Modern Suburbia



Category	Custom Edmonton Target Area PRIZM Highlight
Household Count	Modern Suburbia make up 61,025 households, or 15.6% of the total Households in the Custom Edmonton target area (391,847)
Maintainer Age	Median Household Maintainer Age is 40
Children at Home	57% of couples have children living at home
Household Income	Above Average Household Income of \$137,605 compared to the Custom Edmonton target area at \$114,297
Top Social Value	Confidence in Advertising: A tendency to trust and use advertising as a source of reliable information. Also, a tendency to identify with the fashions and the role models promoted by advertising and the consumer society
Media Habits	<ul style="list-style-type: none"> 11hrs/week listening to the Radio, 18hrs/week watching TV, 0hr/week reading the Newspaper and 4.6hrs/day on the Internet. Daily Magazine usage is minimal (4 min/day) 78% currently use Facebook, 48% use Instagram and 36% use Twitter

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RDOS District – 2019 Visitor Origin Analysis by PRIZM Segment

La Crete Area Target Area

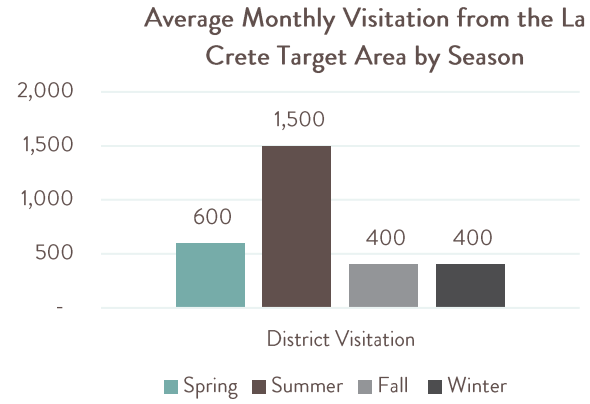


Overview

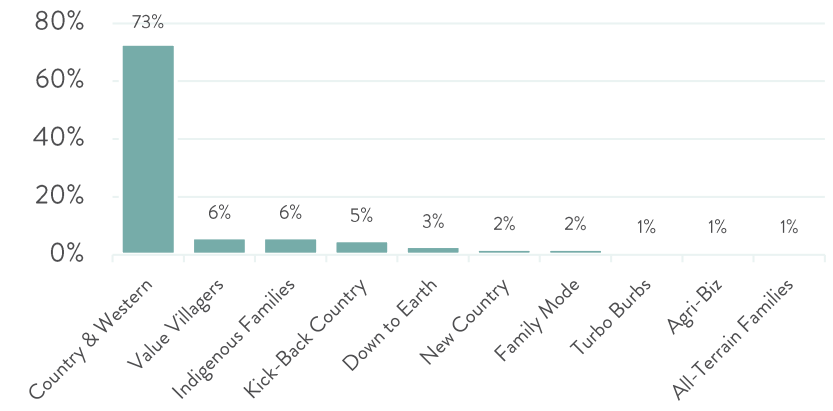
- The **La Crete Target Area** was created using monthly unique visitor origin FSA's as supplied by TELUS Insights, "rolled up" and averaged at the CSD (City) level.
- The **La Crete Target Area** was the second Alberta visitor origin location during Winter 2019, the third during Spring and Summer 2019 and the fourth during Fall 2019.
- The La Crete Area Market consists of **1 large FSA**. Visitors to the RDOS district in 2019 originated from the single large FSA.

La Crete Target Area Market Size and Average Monthly Visitation

La Crete Target Area Market Size
29,753 (Household Count)



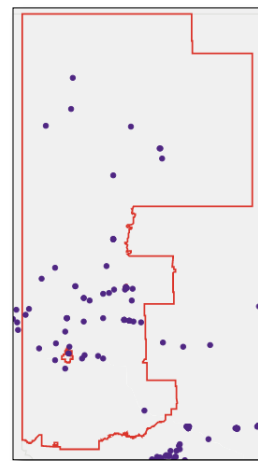
Top 10 PRIZM Segment Breakdown in La Crete Target Area



Country & Western PRIZM Summary – Canada

- Older, middle-income western homeowners
- Mixed Education
- Farming and Blue-Collar employment
- Value outdoor experiencers, boating, camping, hiking, snowmobiles and motorcycles
- Top Geography: Newfoundland, Saskatchewan, Manitoba, British Columbia, Alberta
- EQ Type: Rejuvenator

Top PRIZM Segment in the La Crete Target Area – Country & Western



Note: Red outline defines the custom target area as identified by visitor origin FSA's within a City (CSD).
The purple dots represent the top PRIZM Segment within the custom target area

Category	Custom La Crete Target Area PRIZM Highlight
Household Count	Country & Western make up 21,572 households, or 72.5% of the total Households in the Custom La Crete target area (29,753)
Maintainer Age	Median Household Maintainer Age is 45
Children at Home	47% of couples have children living at home
Household Income	Average Household Income of \$105,817 compared to the Custom La Crete target area at \$113,765
Top Social Value	Ecological Fatalism: A tendency to believe that today's environmental problems are too big for any one person to affect. People strong on this construct feel that environmental destruction is somewhat acceptable and inevitable and accept the notion that job protection or economic advancement should be allowed at the expense of environmental protection.
Media Habits	<ul style="list-style-type: none"> 14hrs/week listening to the Radio, 19hrs/week watching TV, 1hr/week reading the Newspaper and 3.6hrs/day on the Internet. Daily Magazine usage is minimal (13 min/day) 84% currently use Facebook, 32% use Instagram and 22% use Twitter

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FSA = Forward Sortation Area – First three characters of a postal code



RDOS District – 2019 Visitor Origin Analysis by PRIZM Segment

Fort McMurray Target Area



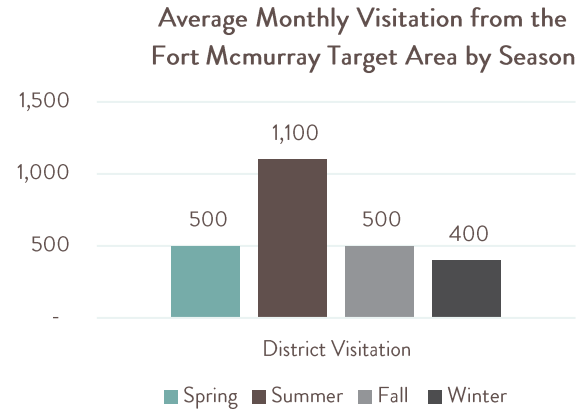
Overview

Fort McMurray Target Area Market Size and Average Monthly Visitation

Top 10 PRIZM Segment Breakdown in the Fort McMurray Target Area

- The **Fort McMurray 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 **Fort McMurray Target Area** was the third largest Alberta visitor origin location during Fall and Winter, the fourth market during Spring and the eighth market during Summer 2019.
- The Fort McMurray Market consists of 3 FSA's. Visitors to the RDOS district in 2019 originated from 2 of them.

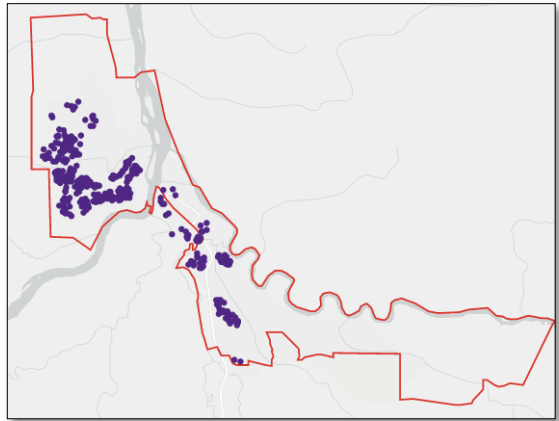
Fort McMurray Target Area Market Size
25,230 (Household Count)



Suburban Sports PRIZM Summary – Canada

- Middle-aged couples and families (with children of all ages at home)
- Moderate Education (high school/college degree)
- Blue-collar positions in service sector (natural resources, Trades)
- Value community involvement and companies that treat their employees fairly
- Top Geography: St. John's, Victoria, Chilliwack, Kelowna and Barrie

Top PRIZM Segment in the Fort McMurray Target Area – Suburban Sports



Note: Red outline defines the custom target area as identified by visitor origin FSA's within a City (CSD).
The purple dots represent the top PRIZM Segment within the custom target area

Category	Custom Fort McMurray Target Area PRIZM Highlight
Household Count	Suburban Sports make up 5,868 households, or 23.3% of the total Households in the Custom Fort McMurray target area (25,230)
Maintainer Age	Median Household Maintainer Age is 46
Children at Home	52% of couples have children living at home
Household Income	Above Average Household Income of \$243,531 compared to the Custom Fort McMurray target area at \$217,053
Top Social Value	Racial Fusion - People who are strongest on this construct are accepting of ethnic diversity within families, such as inter-racial marriage, believing that it enriches people's lives
Media Habits	<ul style="list-style-type: none"> 14hrs/week listening to the Radio, 20hrs/week watching TV, 1hr/week reading the Newspaper and 3.7hrs/day on the Internet. Daily Magazine usage is minimal (8 min/day) 80% currently use Facebook, 38% use Instagram and 30% use Twitter

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RDOS District – 2019 Visitor Origin Analysis by PRIZM Segment

Grande Prairie Target Area



Overview

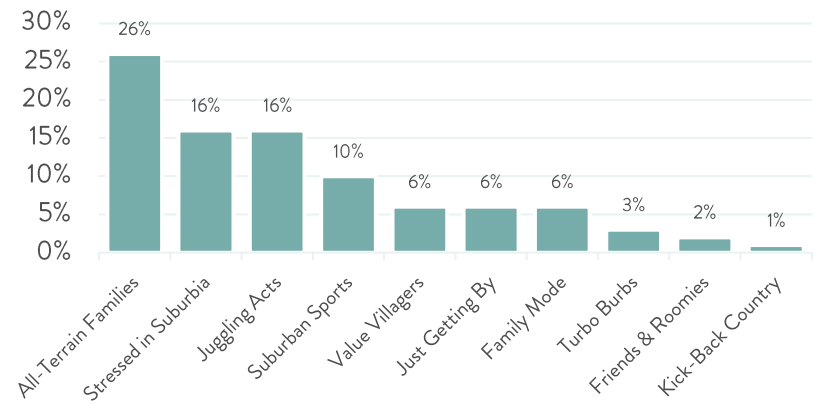
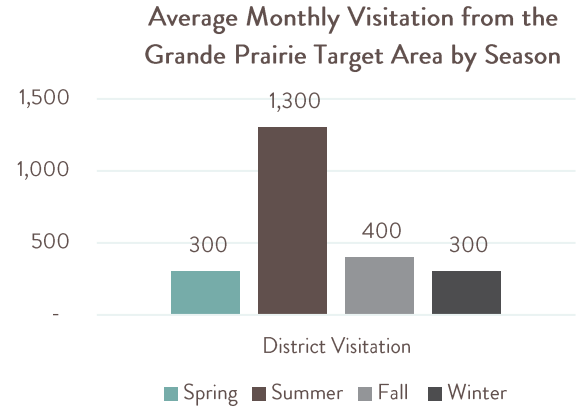
Grande Prairie Target Area Market Size and Average Monthly Visitation

Top 10 PRIZM Segment Breakdown in the Grande Prairie Target Area

- The Grande Prairie 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 Grande Prairie Target Area was the fifth largest Alberta visitor origin location across all seasons in 2019.
- The Grande Prairie Market consists of 3 FSA's. Visitors to the RDOS district in 2019 originated from all 3 of them.

Grande Prairie Target Area Market Size

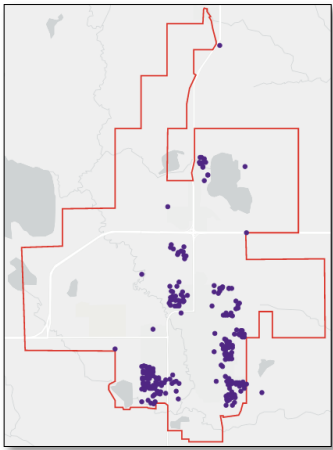
27,739
(Household Count)



All-Terrain Families PRIZM Summary – Canada

- Younger and Middle-Aged couples and families with children under the age of 15
- Moderate Education (high school/college degree/Trades)
- Blue-collar positions in Mining, Oil and Gas Industries
- Value hard work, and the thrill of purchasing, are often impulse shoppers who do not spend a great deal of time researching products before buying them
- Top Geography: St. Johns, Fredericton, Lethbridge, Red Deer
- EQ Type: Free Spirit

Top PRIZM Segment in the Grande Prairie Target Area – All-Terrain Families



Note: Red outline defines the custom target area as identified by visitor origin FSA's within a City (CSD).
The purple dots represent the top PRIZM Segment within the custom target area

Category	Custom Grande Prairie Target Area PRIZM Highlight
Household Count	All-Terrain Families make up 7,343 households, or 26.5% of the total Households in the Custom Grande Prairie target area (27,739)
Maintainer Age	Median Household Maintainer Age is 40
Children at Home	53% of couples have children living at home
Household Income	Above Average Household Income of \$146,852 compared to the Custom Grande Prairie target area at \$130,825
Top Social Value	Need for Escape - The desire to regularly escape the stress and responsibilities of everyday life
Media Habits	<ul style="list-style-type: none"> 14hrs/week listening to the Radio, 21hrs/week watching TV, 0hr/week reading the Newspaper and 3.8hrs/day on the Internet. Daily Magazine usage is minimal (6 min/day) 80% currently use Facebook, 41% use Instagram and 29% use Twitter

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SYMPHONY
TOURISM
SERVICES

INSPIRED NAVIGATION

Contact: Simone Carlyse-Smith, Managing Director
Symphony Tourism Services, a subsidiary of the Thompson
Okanagan Tourism Association

778-721-5448

sts@totabc.com

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