Regional Visitor Highlights

2018 - Year in Review

For Internal Use Only
RESEARCH OVERVIEW

• The following research consists of both Visitor and Market Research utilizing data from TELUS Insights and Environics Analytics.

• Visitor Data provided by TELUS Insights excludes residents of the Thompson Okanagan Region.

• Information is available: Nationally, Internationally, by Province and by Country.

• An individual who travels more than once into the region is counted only once per month visited. Repeat visitation counts those travellers who visited more than once by length of stay.

• 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 Explorer Quotient Types (EQ).

• Market Data can also be profiled by (Fees Apply):
  • Sector (e.g. Hiking, Biking, Culinary)
  • Social Values (e.g. Global Consciousness, Multiculturalism)
  • Custom Variable Sets
  • Custom Geo-Profiles by your top three 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
THOMPSON OKANAGAN REGIONAL VISITATION 2018

9.6 MILLION MINIMUM 1 NIGHT STAYS IN REGION

84% DOMESTIC 8.1 MILLION

56% BC
27% AB
5% SK
5% ON

16% INTERNATIONAL 1.5 MILLION

USA 65%
AUS 7%
GER 5%
CHN 4%

Includes Repeat Visitation by the same individual. Excludes residents of the Thompson Okanagan Region

459K DAY TRIPS STOPPED MIN. 90 MINS

65% | 298K
35% | 161K

Source: TELUS Insights TOTA
THOMPSON OKANAGAN DOMESTIC TOTAL OVERNIGHT STAYS 2018

VISITOR ORIGIN

8,103,330
Total number of Overnight Stays by Minimum One-Night Stay

Note: Totals are based on a minimum of One-Night stay in Region and include Repeat Visitation

56% 4,566,720
British Columbia

27% 2,218,190
Alberta

4% 333,650
Saskatchewan

5% 425,130
Manitoba

5% 398,160
Ontario

Note: 2,370 or 0.03% of Overnight Stays fall below the Privacy threshold and therefore are not classified by Province.

Source: TELUS Insights TOTA
TOP 5 INTERNATIONAL TOTAL OVERNIGHT STAYS 2018

VISITOR ORIGIN

USA
1,002,810
65%

UK
62,340
4%

GER
70,930
5%

CHN
68,370
4%

AUS
115,450
7%

1,546,180
Total number of Overnight Stays by Minimum One-Night Stay

Note: Totals are based on a minimum of One-Night stay in Region and include Repeat Visitation.

Note: 5,810 or 0.37% of Overnight Stays fall below the Privacy threshold and therefore are not classified by Country.

Source: TELUS Insights
THOMPSON OKANAGAN OVERNIGHT STAYS 2018

DOMESTIC LENGTH OF STAY

SINGLE OVERNIGHT

2 NIGHT STAYS*

4-7 NIGHT STAYS*

3 NIGHT STAYS

8-14 NIGHT STAYS

14+ NIGHT STAYS

*WITH THE EXCEPTION OF JULY, AUGUST, AND DECEMBER WHERE 4-7 NIGHT STAYS RANK SECOND, AND 2 NIGHT STAYS RANK THIRD

INTERNATIONAL LENGTH OF STAY

SINGLE OVERNIGHT

4-7 NIGHT STAYS

2 NIGHT STAYS

3 NIGHT STAYS

8-14 NIGHT STAYS

14+ NIGHT STAYS

REPEAT VISITATION

Single night repeat visitation dominates across all international markets.

PEAKING IN AUGUST WITH 23K REPEAT VISITS FROM INTERNATIONAL TRAVELERS

Source: TELUS Insights

SINGLE NIGHT REPEAT VISITATION DOMINATES ACROSS ALL DOMESTIC MARKETS

PEAKING IN JULY WITH 215K REPEAT VISITS FROM CANADIAN TRAVELLERS
THOMPSON OKANAGAN REGIONAL MOVEMENT
BY HIGHEST VOLUME AVERAGE 2018

REGIONAL MOVEMENT FROM CANADIAN TRAVELLERS ON AVERAGE IS STRONGEST TRAVELLING FROM

GOLD COUNTRY → THOMPSON
29,769 Travellers

- Thompson → Gold Country (29,162)
- RDOS → Central Okanagan (21,948)
- North Okanagan → Central Okanagan (21,188)

REGIONAL MOVEMENT FROM INTERNATIONAL TRAVELLERS ON AVERAGE IS STRONGEST TRAVELLING FROM

GOLD COUNTRY → THOMPSON
11,482 Travellers

- Thompson → Gold Country (7,184)
  Gold Country → Shuswap (4,314)
- Shuswap → Thompson (4,175)

Note: Regional Movement numbers are based on average visitation across 12 months and not total unique visitor count.

* Origins and Destinations were based on previous and next stops, using the minimum 90 minute stop definition.
**EQ Composition by Top BC Visitor Origin Markets**

### Vancouver – All Seasons

**Top EQ Types:**

1. Free Spirits (51%)
2. Cultural Explorers (30%)

![Free Spirits](image1)

### Top Vancouver FSA – All Seasons

**Top EQ Types:**

1. Cultural Explorers (81%)
2. Cultural History Buffs (17%)

![Cultural Explorers](image2)

### Surrey – All Seasons

**Top EQ Types:**

1. Personal History Explorers (36%)
2. Free Spirits (17%)

![Personal History Explorers](image3)

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**Note:** This represents the EQ Market Composition by Custom Target Area based on counts by FSA (90 minute stay in region).

The percentage indicates the composition of the EQ Types by custom target area and does not reflect the city as a whole.
Calgary – All Seasons

Top EQ Types:

1. Authentic Experiencers (27%)

2. Free Spirits (27%)

Edmonton – All Seasons

Top EQ Types:

1. Gentle Explorers (23%)

2. Free Spirits (22%)

3. Authentic Experiencers (20%)

Note: This represents the EQ Market Composition by Custom Target Area based on counts by FSA (90 minute stay in region).

The percentage indicates the composition of the EQ Types by custom target area and does not reflect the city as a whole.
EQ COMPOSITION BY TOP ONTARIO VISITOR ORIGIN MARKETS

**Toronto**
Top Target Area EQ Types

- Cultural Explorers – All Seasons
- Free Spirits – Except Fall
- Cultural History Buffs – Fall and Winter

**Ottawa**
Top Target Area EQ Types

- Authentic Experiencers – Except Winter
- Free Spirits – All Seasons
- Cultural Explorers – Except Summer
- Gentle Explorers - Winter

*Note:* This represents the EQ Market Composition by Custom Target Area based on counts by FSA (90 minute stay in region).
ABOUT ENVIRONONICS ANALYTICS

• Enviononics 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.

• Enviononics 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.
Questions?

Simone Carlysle-Smith
Managing Director Symphony Tourism Services

sts@totabc.com

778.721.5448