Symphony Tourism Services
2023 Community Research Overview

SYMPHONY
TOURISM
SERVICES

The **BC Regional Tourism Secretariat Regional DMOs** together with their research partners, bring accessible and affordable research to Communities across British Columbia.

How?

With mobile data tools, we can bring visitor analysis to the **community level** or the **business level.**

Working Together
The Process

Identify Objectives

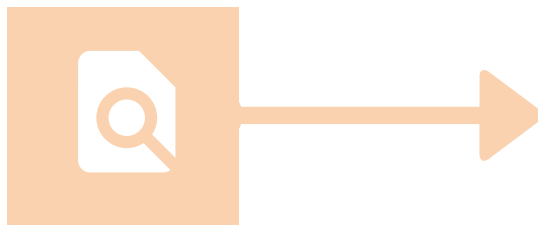Work together to determine Research Objectives

Develop Program

Recommend Program and Reports best suited to Objectives

Proposal

Proposal is submitted outlining project deliverables and a contract is signed

Analysis

Data is analyzed, Summary Report and Supporting Documents are compiled

Delivery & Follow Up

Reports are presented to you and support provided by a follow up session

The Options
VisitorView, MobileScapes, Dashboard

VisitorView

- Ideal for cities, regional districts, cooperatives, etc. with large areas

- Monthly, Quarterly, Yearly data

- Includes Overnight Stay data

MobileScapes

- Ideal for smaller budget destinations

- Mobile device data collected in client chosen locations (Maximum 110 acres)

- Custom time range

Dashboard

- Ideal for destinations of all sizes

- Completely customizable

- Various data sources supplied by the client or sourced by Symphony including data from MobileScapes and Visitor view

About VisitorView

- Symphony Tourism Service's data partner, **Environics Analytics**, is a Canadian based research firm providing information solutions for a variety of industries in Canadian, USA and International Markets.

- Symphony is the data processing partner of the British Columbia Regional Tourism Secretariat (BCRTS) which holds the EA data license.

- The "VisitorView Canada" platform provides insights the tourism industry needs to understand, market, and grow their business with Canadian travellers.

- Visitor View produces neighborhood-level estimates of overnight Canadian visitors to **Canada**, the **provinces** and **territories**, one of Canada's **85 tourism regions** as defined by Destination Canada, and more.

- Estimates are provided for the **total number of visitors**, the **number of trips** and the **number of nights spent** in each province or tourism region.

- VisitorView is based on anonymized, consent-based mobile location data Monthly, quarterly and annual estimates

Methodology

- **Visitor:** A visitor is defined as someone who travels 60+km from their point of origin

- **Trips:** Are defined as the count of domestic traveller trips which involved spending one or more nights over the time period as part of a continuous visit to the destination

- **Nights Stayed:** Is defined as the count of unique nights a domestic visitor was observed in the destination over the time period (between 6:00pm – 8:00am the following day)

VisitorView Report Content

Visitor Counts and Origins - by Canadian Province

- Visitor Volume: Unique Overnight Visitors, Trips, Nights Stayed, Average Length of Stay

Visitor Counts and Origins - by Top Markets (BC & AB)

- BC & AB Visitor Volume: Unique Overnight Visitors, Trips, Nights Stayed, Length of Stay
- Visitor Origins: Top Cities in BC & AB

Visitors by Market Segment: PRIZM & EQ

- Environics Analytics PRIZM Market Segments
- Explorer Quotient (EQ) top traveller types visiting as defined by Destination Canada's clusters of PRIZM market segments. These can be used to develop communications strategies and products to suit the profiles. Includes percentage breakdown, summaries and detailed profiles.
- Detailed 17-page PRIZM & EQ Profiles
- Potential new geographies to target based on goals and similar market segments.
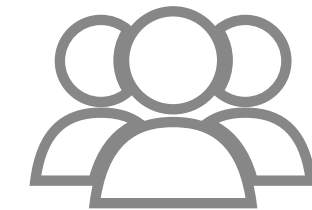
About MobileScapes

What is MobileScapes?

- Combines data collected from mobile devices with location enabled tracking on various Apps

- Identifies devices observed within a defined area:
  - e.g Trail head, public square or a hotel for a given date and time range
  - 110 acres (Non-contiguous)

- The amount of anonymized, permission based data captured is dependent upon:
  - Device being ON
  - Device has Apps allowing location tracking
  - There is a WIFI or Cell tower within the geo-fenced area for the device to ping

- The devices then become a sample of the visitors to the area (just like a sample of people answering a survey)

- The Sample is then reviewed for visitor origin postal codes, extrapolated and then averaged using a number of external data sources used by Environics Analytics to weight and validate the data

Why MobileScapes?

Short of doing an intercept or in-person visitor survey, the next best solution is Mobile Data. It allows us to capture a sample of visitors at various locations and assess them by origin, demographic and psychographic variables.
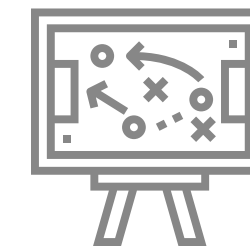
Identify **WHO** visits your location, **WHAT** they like (Activities/Media Habits) and **WHERE** there are more people like them in your top markets.

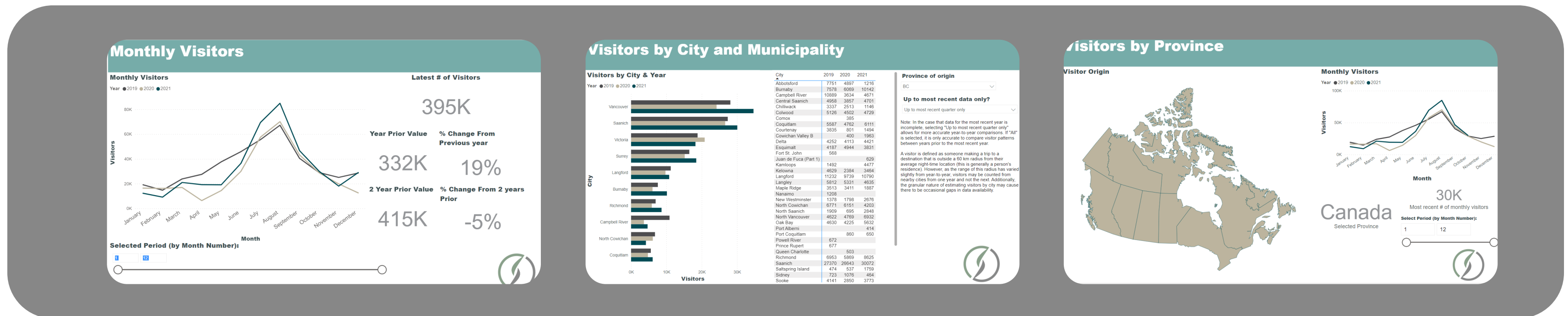**Understand your Visitors**

Identify Top Markets

Execute your Strategy

| Report Content	VisitorView vs MobileScapes	
Visitor Counts and Origins (Canada, USA & International available)	✓	**Only Canada and USA**
• Unique Visitors	✓	✓
• Trips	✓	✓
• Nights Stayed	✓	
• Average Length of Stay		✓
• Average visits per visitor		✓
• Visit Summary by daypart and day of the week		✓
Visitor Counts and Origins - by Top Markets (BC & AB)		
• Unique Visitors by month	✓	✓
• Trips by month	✓	
• Nights Stayed by month	✓	
• Average Length of Stay	✓	
• Top Cities in BC & AB	✓	✓
Visitors by Market Segment: PRIZM & EQ		
• Environics Analytics PRIZM Market Segments	✓	✓
• Explorer Quotient (EQ) top traveller types: Includes percentage breakdown, summaries and detailed profiles	✓	✓
• Detailed 17-page PRIZM & EQ Profiles	✓	✓
• Potential new geographies to target based on goals and similar market segments	✓	✓

Dashboard Services

- **Ideal for destinations of all sizes**

- **Completely customizable**

- **Various data sources supplied by the client or sourced by Symphony, including data from MobileScapes and VisitorView**

For more information or a walk through of an example Dashboard contact
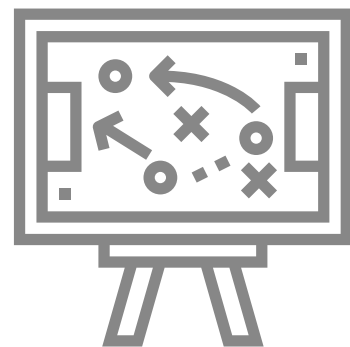Info@SymphonyTourism.ca

How Can These Insights Help You?
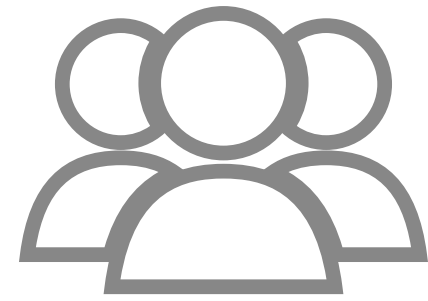
Understand your Customers

Identify Top Markets

Execute your Strategy

Develop Profiles

- Visitor Profiles developed to help you understand your visitors
  - Origins
  - Demographics
  - Psychographics
  - Life Stage/Family Size
  - Income Level
  - Media Habits
  - Activities/Interests

Product Development & Campaigns

- Use your Visitor Insights to create new products or Itineraries
- Tailor existing products/services to existing customers or potential future customers
- Identify New Target Markets to expand your reach
- Target Digital or Traditional Media Campaigns based on geography, media habits, social values, activities etc.

Deliverables
What's Included?

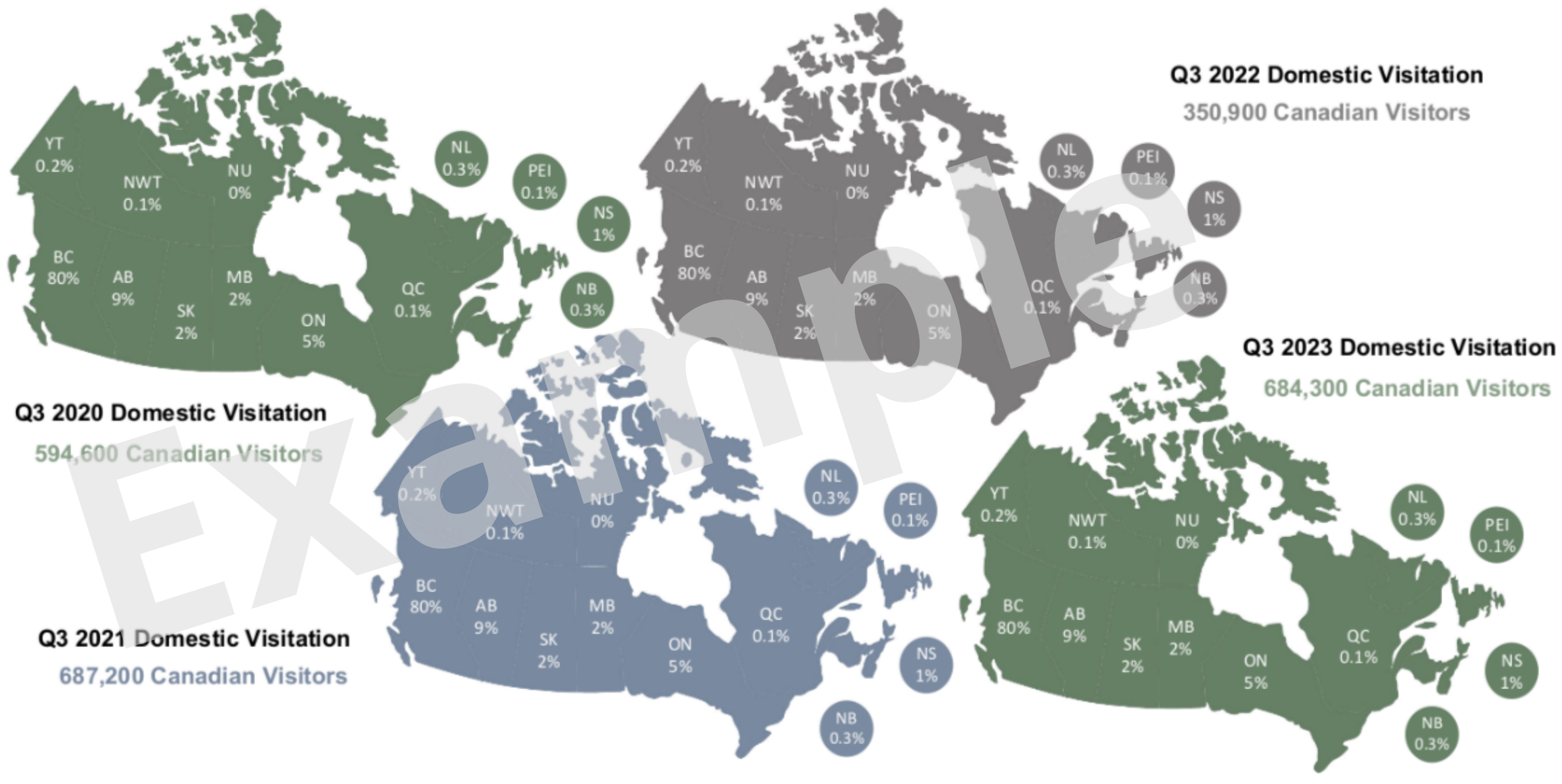| Visitor Data	Market Data

• Approximate Visitor Volume by time frame
 	
• Top visitor origin locations by province and city
 	
• Visitor Profile by Top Origins
 	
• Percentage breakdown by province
 	
• Top PRIZM segments by origin
 	
• Top EQ segments by origin
	• Visitor profile Highlights by Prizm Segment and EQ segment
	
	   ○ Demographics
	   ○ Key Social Values
	   ○ Key Tourism Activities
	   ○ Travel Profile (Vacation Booking, Vacation Spend etc.)
	   ○ Traditional and Digital (Social) Media usage
	   ○ Product Preferences
	   ○ Activity interests
	   ○ Internet Activity

Sample Report Content

Visitor View Quarterly Provincial Visitors
Example

Overview

During Q3 2020 British Columbia saw an average of **594,600** Domestic Visitors. During Q3 2021 the region saw **687,200** Domestic Visitors, in Q3 2022, **350,900** Domestic Visitors and in Q3 2023, **684,300** Domestic Visitors.

- **Increase** of 15% 2023 compared to 2020

- **Increase** of 95% 2023 compared to 2021

- **Decrease** of -0.4% 2023 compared to 2022

Note: A Visitor is defined as someone who travels 60+ km from their point of origin, counts may include British Columbia resident visitors depending on point of origin and point of destination
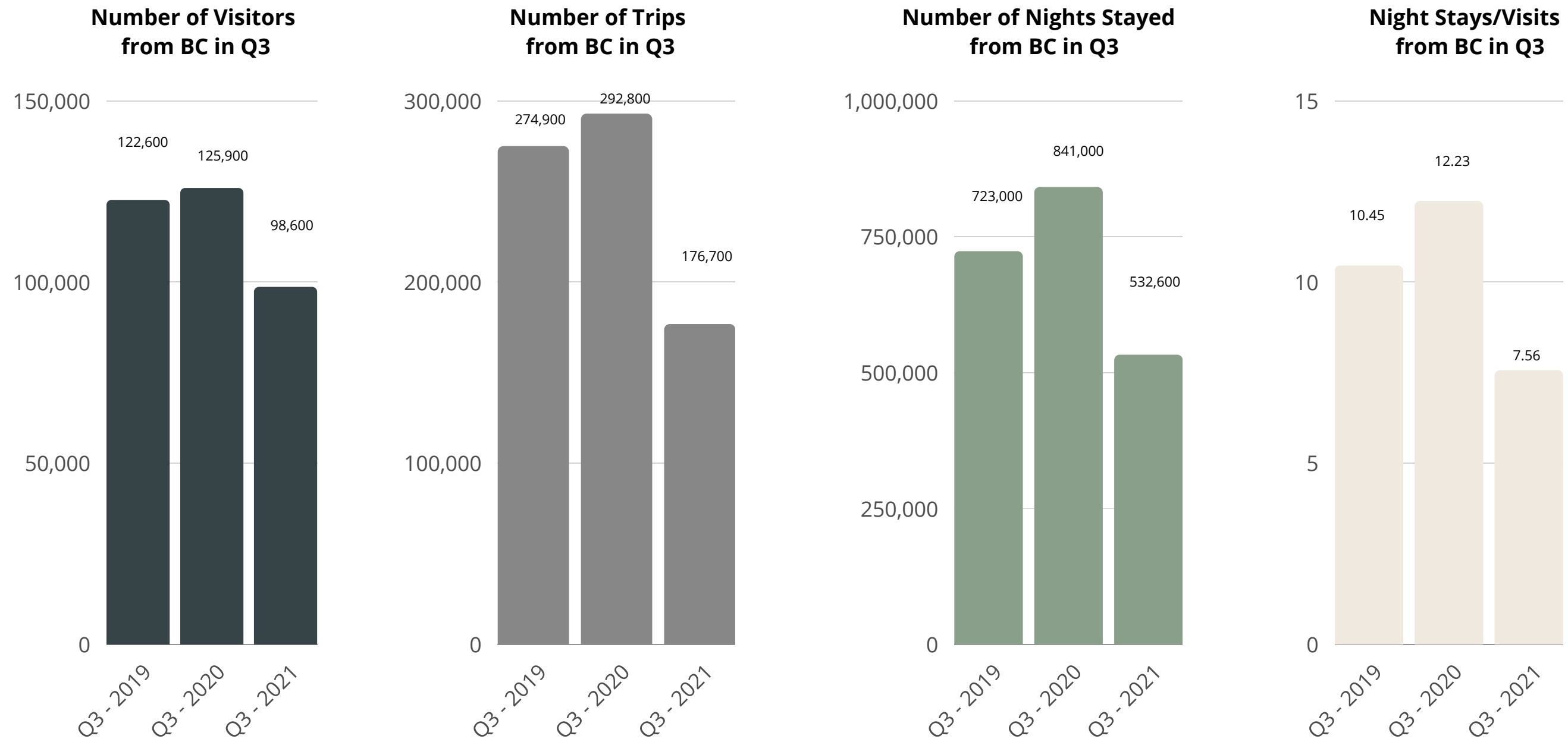

Q3 2020 Domestic Visitation
594,600 Canadian Visitors

Q3 2021 Domestic Visitation
687,200 Canadian Visitors

Q3 2022 Domestic Visitation
350,900 Canadian Visitors

Q3 2023 Domestic Visitation
684,300 Canadian Visitors

BC Visits To Example Area
Number Of Visitors By Origin City (Example)

City	-Time Period- Visitor Count
Prince George	15,000
Vancouver	6,200
Surrey	4,800
Kitimat	4,400
Terrace	3,800
Smithers	3,500
Abbotsford	3,300
Prince Rupert	3,100
Vanderhoof	3,100
Kamloops	3,000

City	-Time Period- Visitor Count
Prince George	16,700
Vancouver	6,300
Surrey	4,500
Kamloops	3,800
Kitimat	3,600
Prince Rupert	3,400
Abbotsford	3,300
Smithers	2,900
Terrace	2,900
Vanderhoof	2,800

City	-Time Period- Visitor Count
Prince George	21,100
Prince Rupert	4,700
Surrey	3,300
Terrace	2,900
Vancouver	2,800
Smithers	2,600
Kamloops	2,500
Vanderhoof	2,400
Nanaimo	2,100
Bulkley-Nechako A	1,800

Visitation
BC Residents Travelling To Example Area

Number of Visitors from BC in Q3

150,000
- Q3 - 2019: 122,600
- Q3 - 2020: 125,900
- Q3 - 2021: 98,600

100,000

50,000

0

Number of Trips from BC in Q3

300,000
- Q3 - 2019: 274,900
- Q3 - 2020: 292,800
- Q3 - 2021: 176,700

200,000

100,000

0

Number of Nights Stayed from BC in Q3

1,000,000
- Q3 - 2019: 723,000
- Q3 - 2020: 841,000
- Q3 - 2021: 532,600

750,000

500,000

250,000

0

Night Stays/Visits from BC in Q3

15
- Q3 - 2019: 10.45
- Q3 - 2020: 12.23
- Q3 - 2021: 7.56

10

5

0

Q3 = July | August | September
Note: All counts have been rounded to the nearest 100

Visitor View Domestic Visitors By PRIZM & EQ Type
2019 - 2020 - 2021 (Example)

| Q3 - 2019 | Q3 - 2020 | Q3 - 2021 |

Q3 2019 Visits by EQ Type

Q3 2020 Visits by EQ Type

Q3 2021 Visits by EQ Type
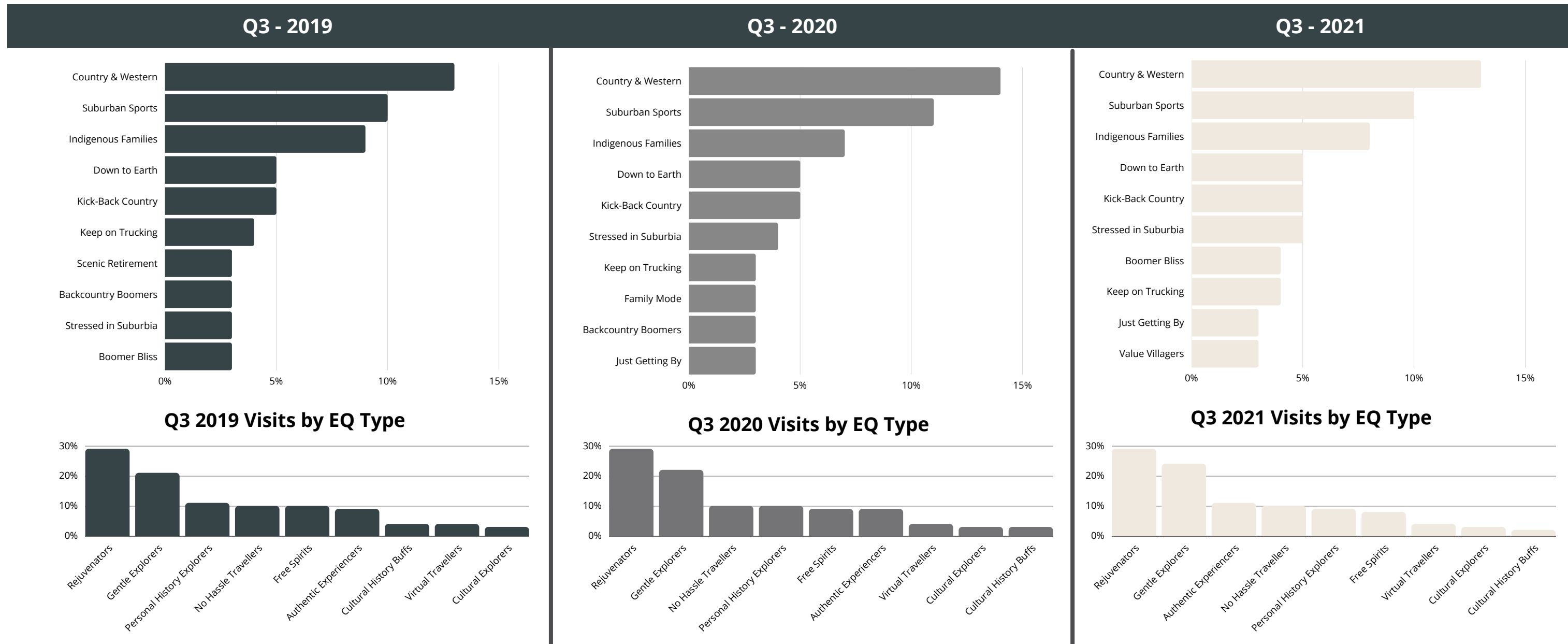
- **Similar output for Mobilescapes - Market Segments by time period**

Insights- Potential Growth Markets
Top Locations By Top Market Segments (Example)

Alberta	British Columbia	AB Target Considerations	BC Target Considerations

Calgary/Edmonton/ Airdrie
 	
○ Loyal Visitors who understand your products/services and travelled during multiple periods.
 	
○ These geographies are also strong visitors by PRIZM Segment
	Local Thomspon Okanagan Residents
	○ Kelowna, Kamloops, Vernon
	○ Columbia-Shuswap C, E, F
	○ North Okanagan F
	   ■ These are loyal visitors who understand your products/services and visited during both time periods
	
	BC Regional Visitors
	○ Vancouver, Surrey, Abbotsford
	   ■ Less frequent travellers looking for experiences that allow them to connect with nature and experience different outdoor activities
		Consider targeting by Alberta Top PRIZM Segments:
		
		○ New Country
		○ Turbo Burbs
		○ Mature & Secure
		○ Kick-Back Country
		○ All-Terrain Families
		○ Family Mode
		○ The A-List
		○ Country & Western
		○ Mid-City Mellow
		○ Modern Suburbia
		○ Middle-Class Mosaic
		○ All-Terrain Families
		○ Multicultural Corners
		○ Friends & Roomies
		○ Stressed in Suburbia
		
		Top 10 Locations of Top PRIZM Segments:
		○ Calgary
		○ Edmonton
		○ Strathcona County
		○ Airdrie
		○ St. Albert
		○ Red Deer
		○ Lethbridge
		○ Wood Buffalo
		○ Grande Prairie
		○ Rocky View County
			Consider targeting by BC Top PRIZM Segments:
			
			○ Backcountry Boomers
			○ Country & Western
			○ Boomer Bliss
			○ Down to Earth
			○ Family Mode
			○ New Country
			○ Scenic Retirement
			○ Suburban Recliners
			○ Suburban Sports
			○ Scenic Retirement
			○ Indigenous Families
			○ Slow-Lane Suburbs
			○ Agri-Biz
			○ Just Getting By
			
			Top 10 Locations of Top PRIZM Segments:
			○ Surrey
			○ Langley
			○ Kelowna
			○ Delta
			○ Coquitlam
			○ Chilliwack
			○ Maple Ridge
			○ Saanich
			○ Abbotsford
			○ North Vancouver

A note about the BC & AB Target Considerations

These "Top 10 Locations" have been identified by running North Thompson Valley's top PRIZM segments through the database to pull out the top cities to target in order to capture these segments.

If you would like to target by PRIZM segment, we have provided the Postal Codes or FSAs to be used in marketing campaigns. These would be the specific FSAs aligned to your top market segments.

2021 BC PRIZM Segment Summary
Suburban Sports

General Canadian Summary

- 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

- EQ Type: Gentle Explorer

Source: Environics PRIZM Marketer's Guide 2021

Category	British Columbia Highlights
Household Count	Of the 67 PRIZM Clusters identified in Canada, Suburban Sports rank 1st, making up 122,632 households, or 6.1% of the total Households in British Columbia (2,018,734).
Maintainer Age	Median Household Maintainer Age is 52
Children at Home	47.1% of couples have children living at home (Above Average).
Household Income	Above Average Household Income of $127,861 compared to BC at $113,574.
Top Social Values	Rejection of Orderliness, Need for Escape, and Racial Fusion
Top Tourism Activities	Swimming, Camping, and Hiking/Backpacking. Above Average interest in Cycling, Visiting National/Provincial Parks, and Golfing.
Travel	Above Average interest for travelling within Canada (Above Average for Vancouver, Banff, and Jasper), Suburban Sports from British Columbia spent an average of $1,566 (Average) on their last vacation.
Social Media	76.8% currently use Facebook, 36.9% use Instagram, 24.6% use Twitter, and 69.3% use YouTube.

Source: Environics Analytics- Envision 2021

Summaries provided for all top segments in report
- Access to all summaries for BC & AB as part of BCRTS Research Program

Example Key Findings

Category	BC Visitors - Excluding Locals	BC Visitors - Excluding Locals	AB Visitors	AB Visitors
	April - Sept	Nov - March	April - Sept	Nov - March
Estimated Visitor Volume and %	40,000 or 65% were from BC	90,000 or 72% were from BC	20,000 or 14% were from Alberta	50,000 or 50% were from Alberta
Top Visitor Origin Locations	• Kamloops • Surrey • Chilliwack • Cariboo L • Abbotsford	• Kamloops • Surrey • Abbotsford • Chilliwack • Vancouver	• Edmonton • Grande Prairie • Strathcona County • Grande Prairie County 1 • Calgary	• Edmonton • Grande Prairie • Strathcona County • Calgary • Jasper
Top PRIZM Segments	• Suburban Sports • Country & Western • Family Mode • Kick-Back Country • Stressed in Suburbia	• Family Mode • Suburban Sports • Country & Western • Kick-Back Country • South Asian Society	• New Country • All-Terrain Families • Modern Suburbia • Suburban Sports • Country & Western	• New Country • All-Terrain Families • Modern Suburbia • Country & Western • Suburban Sports
Top EQ Types	• Gentle Explorers • Rejuvenators • Authentic Experiencers	• Rejuvenators • Gentle Explorers • Free Spirits	• Free Spirits • Rejuvenators • Gentle Explorers	• Rejuvenators • Free Spirits • Gentle Explorers

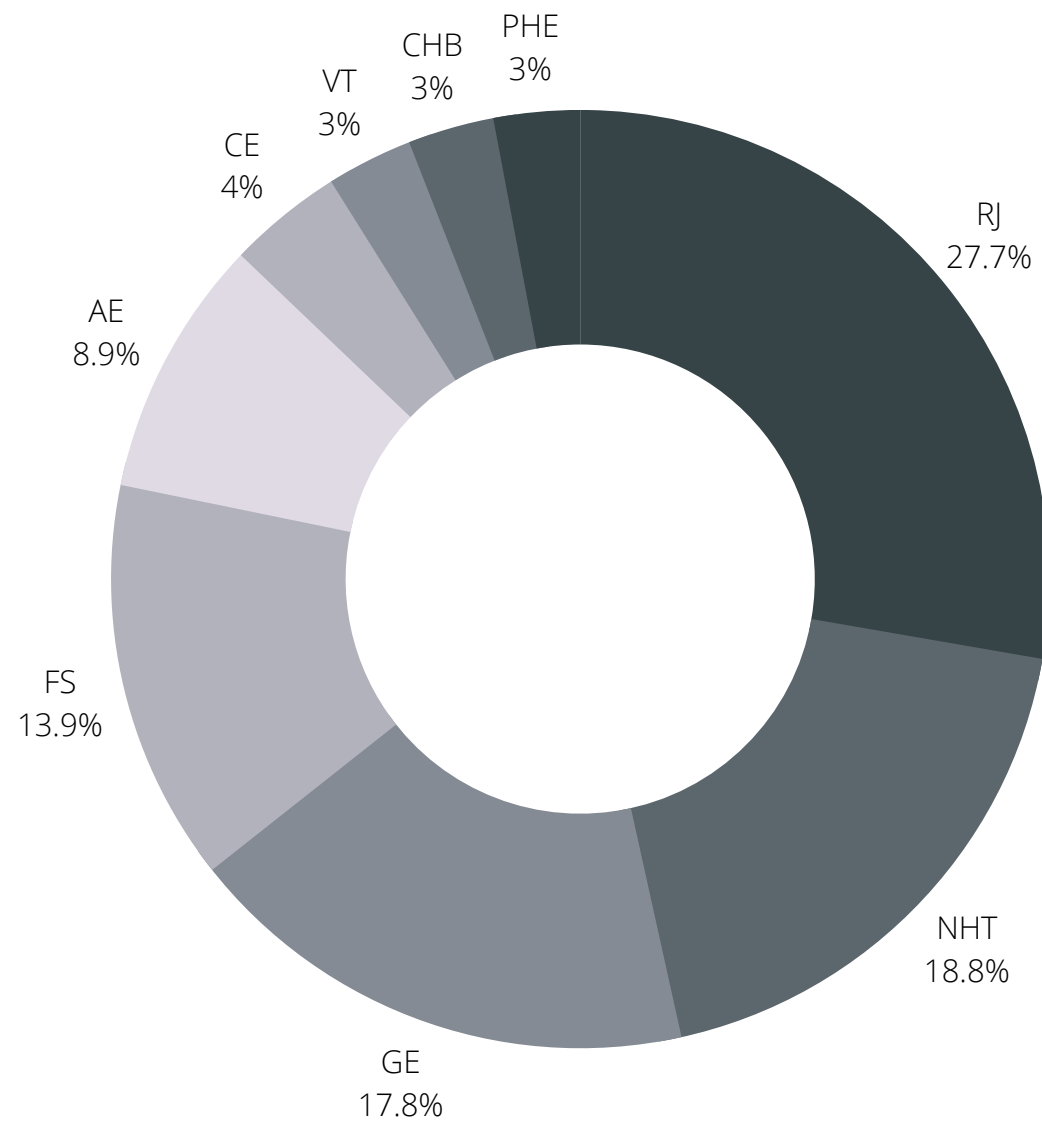# Top PRIZM Segments Of Visitors To Your Area
Canadian PRIZM Summaries (Example)

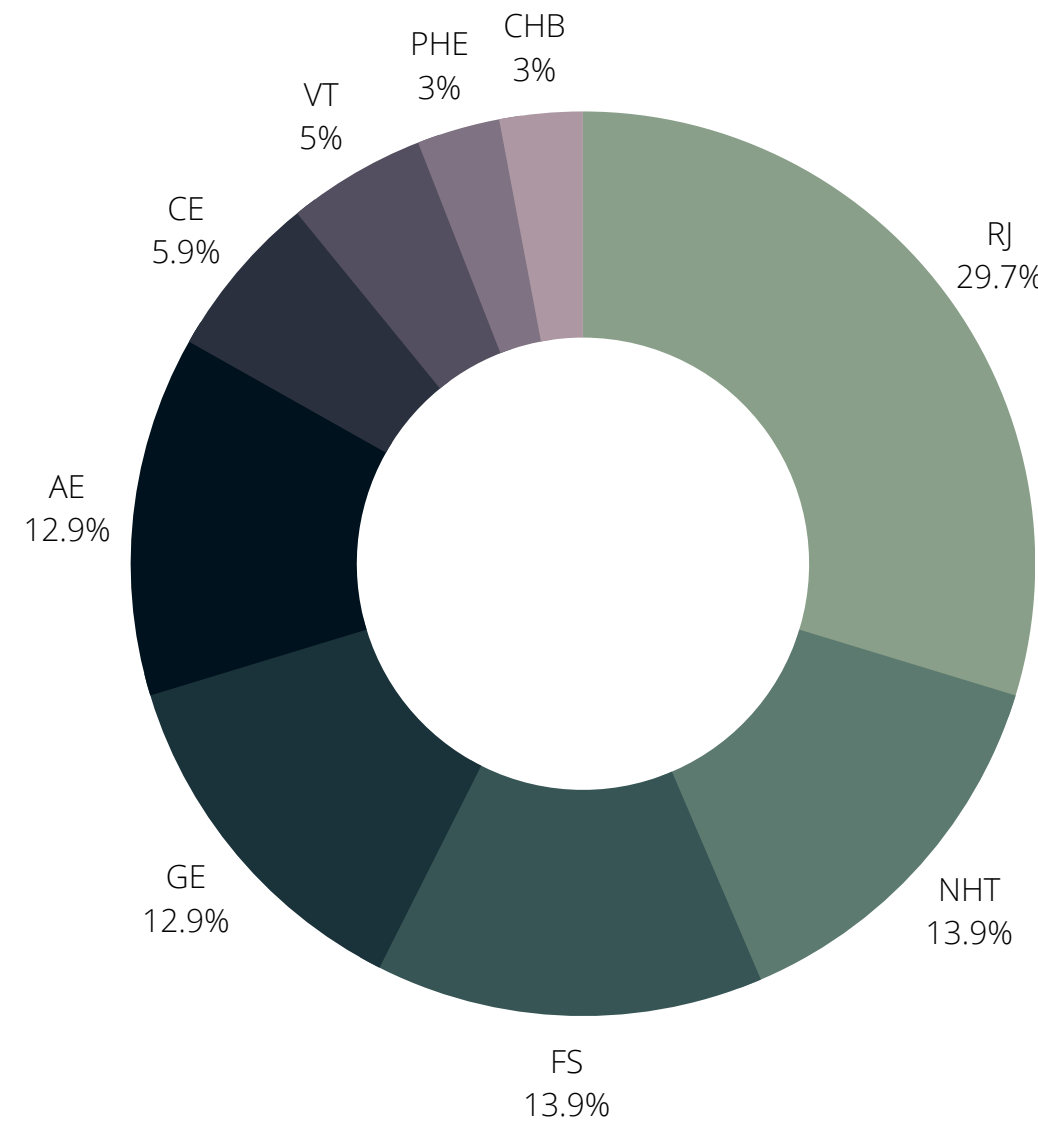| Country & Western	Keep on Trucking	Suburban Sports	New Country	Family Mode
Country & Western are typically: • Middle-aged • Below-average income travellers • Value outdoor experiences such as: ○ Snowmobiling ○ Hiking ○ Camping ○ Boating	Keep on Trucking are typically: • Younger and middle-aged couples and families • Higher concentration of peoples with Aboriginal Origin • Value small-town community involvement, living a healthy lifestyle and social equality	Suburban Sports are typically: • Middle-aged couples and families • Above average incomes • Who enjoy: ○ Camping ○ Fishing/hunting ○ Cross country skiing and snowshoeing	New Country are typically: • One of the wealthiest rural segments in Canada • Typically between the ages of 45-64 years old • Value: ○ Community involvement ○ purchasing from small businesses	Family Mode are typically: • Middle-aged couples and families with children (ages 10+) at home • Value: ○ Outdoor adventure and interacting with people from different cultures

Top EQ Types Of Visitors To Your Area
Guests From British Columbia, Alberta & Ontario (Example)

British Columbia

RJ 27.7%
NHT 18.8%
GE 17.8%
FS 13.9%
AE 8.9%
CE 4%
VT 3%
CHB 3%
PHE 3%

Alberta

RJ 29.7%
NHT 13.9%
FS 13.9%
GE 12.9%
AE 12.9%
CE 5.9%
VT 5%
PHE 3%
CHB 3%

Ontario

GE 47%
NHT 24%
RJ 8%
FS 7%
PHE 5%
CE 4%
AE 3%
CHB 2%

Authentic Experiencers **(AE)**
Cultural History Buffs **(CHB)**
Cultural Explorers **(CE)**

Free Spirits **(FS)**
Gentle Explorers **(GE)**
No Hassle Travellers **(NHT)**

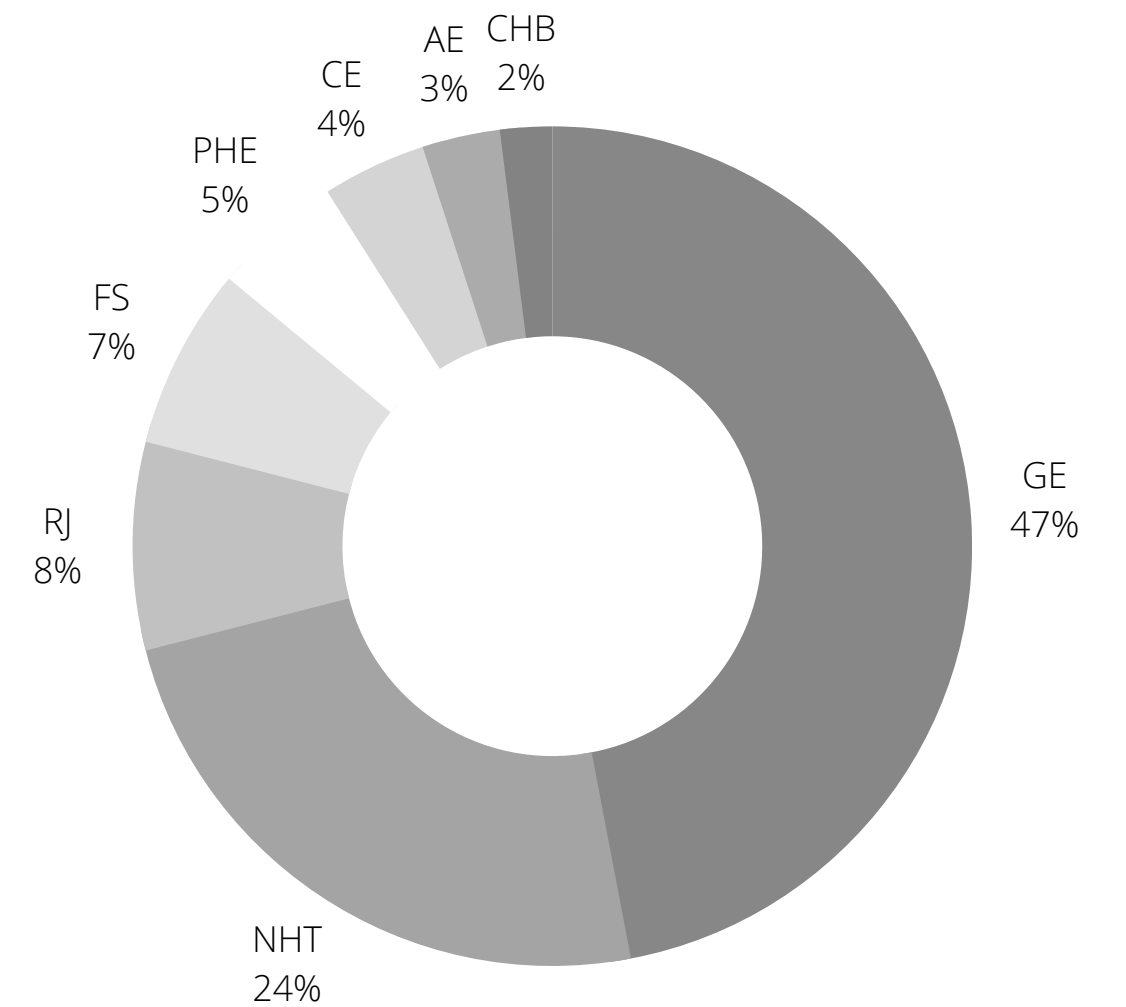Personal History Explorers **(PHE)**
Rejuvenators **(RJ)**
Virtual Travellers **(VT)**

Additional Reports

Profile Details:

- Each EQ, PRIZM and Visitor Profile Includes 17 pages of detailed information:
  - Top cities to find them in
  - Demographics
  - Key Social Values
  - Key Tourism Activities
  - Travel Profile (Vacation Booking, Vacation Spend etc.)
  - Traditional and Digital (Social) Media usage
  - Product Preferences
  - Internet Activity

bcrts
British Columbia
Regional Tourism
Secretariat

Country & Western
PRIZM Segments Included (by SESI): 50
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada Country & Western rank 3rd, making up 87,601 households, or 4.4% of the total Households in British Columbia (2,010,897)

- The Median Household Maintainer Age is 57, 48% of couples have children living at home

- Below Average Household Income of $91,291 compared to BC at $106,681

- **Top Social Value: Attraction to Nature** - How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life

- Above average interest in visiting Parks/City Gardens, Photography, Canoeing and Kayaking

- Above average interest in travelling within Canada (Vancouver, Victoria, Alberta, Calgary, Nova Scotia, Jasper and Montreal), Country & Western from British Columbia spent an average of $1,348 on their last vacation

- On average, Country & Western from British Columbia spend 14hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.6hrs/day on the Internet. Daily Magazine usage is minimal (10 min/day)

- 84% currently use Facebook, 33% use Instagram and 22% use Twitter

- EQ Type: Rejuvenator

Market Sizing

Total Population
Target Group: 220,156 | 4.3%
Market: 5,064,371

Total Households
Target Group: 87,601 | 4.4%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Revelstoke, BC (CY)	3.2	73.6	1,691	3,763	0.2
Port Hardy, BC (DM)	1.8	71.4	1,646	2,161	0.1
Merritt, BC (CY)	1.6	45.0	1,034	3,117	0.2
Rossland, BC (CY)	1.6	80.0	1,839	1,752	0.1
Whistler, BC (DM)	1.5	23.7	542	5,686	0.3
Lake Cowichan, BC (T)	1.5	72.6	1,666	1,789	0.1
Princeton, BC (T)	1.5	79.8	1,835	1,592	0.1
Mackenzie, BC (DM)	1.4	70.2	1,605	1,742	0.1
Peace River B, BC (RDA)	1.3	65.6	1,514	1,697	0.1
Smithers, BC (T)	1.3	56.4	1,295	1,950	0.1

Top PRIZM Segments
% of Target Group Households

50 - Country & Western   100.0

Additional Information And Contact

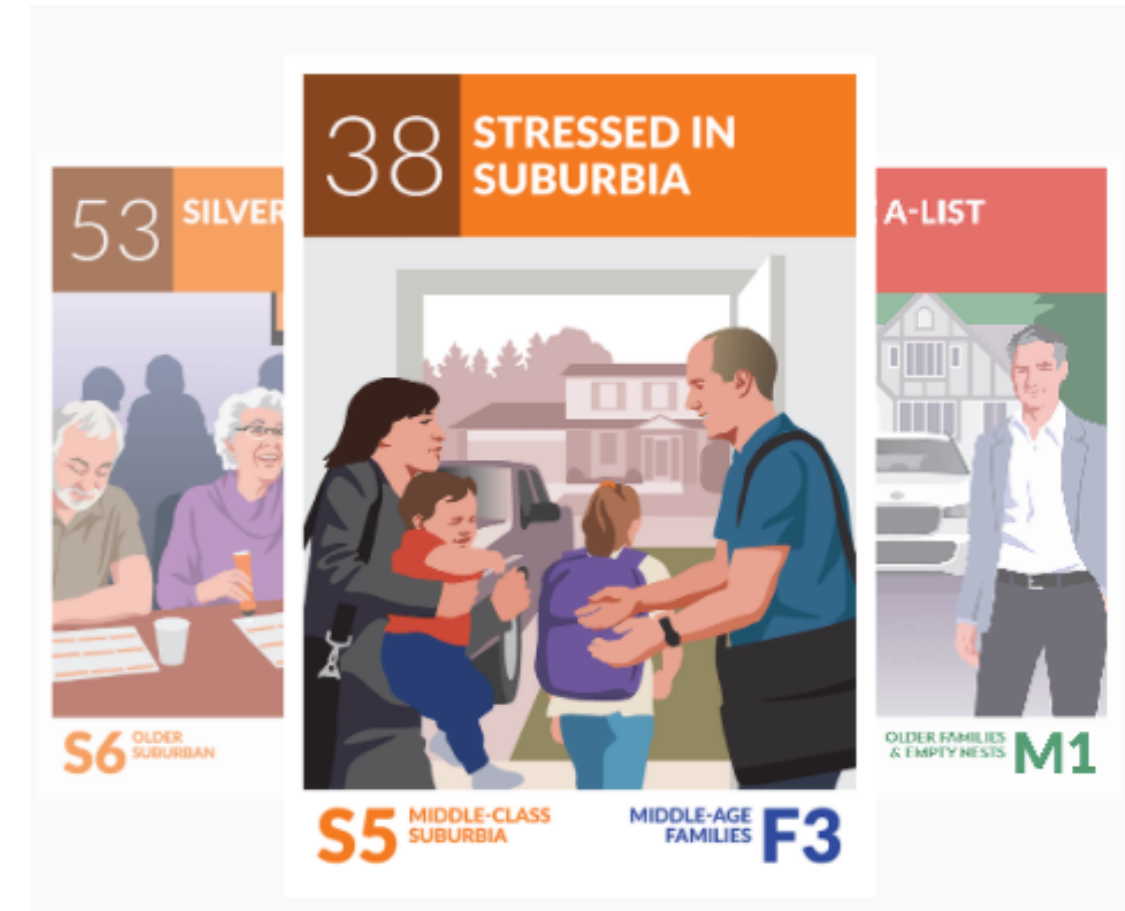# About Environics Analytics

Environics Analytics is one of North America's leading data analytics and marketing services companies.

PRIZM 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
- International

About EQ

- **Explorer Quotient**, also known as EQ, was developed by Destination Canada in partnership with Environics Analytics.

- EQ is a proprietary market segmentation system based on the science of psychographics; developed to provide tourism businesses with insights into why and how people like to travel.

- EQ goes beyond traditional market research of defining people. It looks deeper at views of the world to learn exactly why different types of travellers seek out entirely different travel experiences.

About
Symphony Tourism Services

- **Symphony Tourism Services** is a small research and marketing consulting company created as a resource to support the tourism industry across British Columbia. STS is a subsidiary of the **Thompson Okanagan Tourism Association (TOTA)**.

- STS currently supplies **research**, **marketing, training, consulting** and **project management** services ranging from economic development and tourism development consulting, custom visitor and market research, and digital marketing campaign development and execution.

Learn more at symphonytourismservices.com

Contact Us
For Inquires and Pricing

Submit the Contact Form Directly

OR

Email: Info@SymphonyTourism.ca
Phone: (778) 721-5448

symphonytourismservices.com