



Thompson
Okanagan
Tourism
Resiliency
Program

RESEARCH ROUNDUP



SYMPHONY
TOURISM
SERVICES

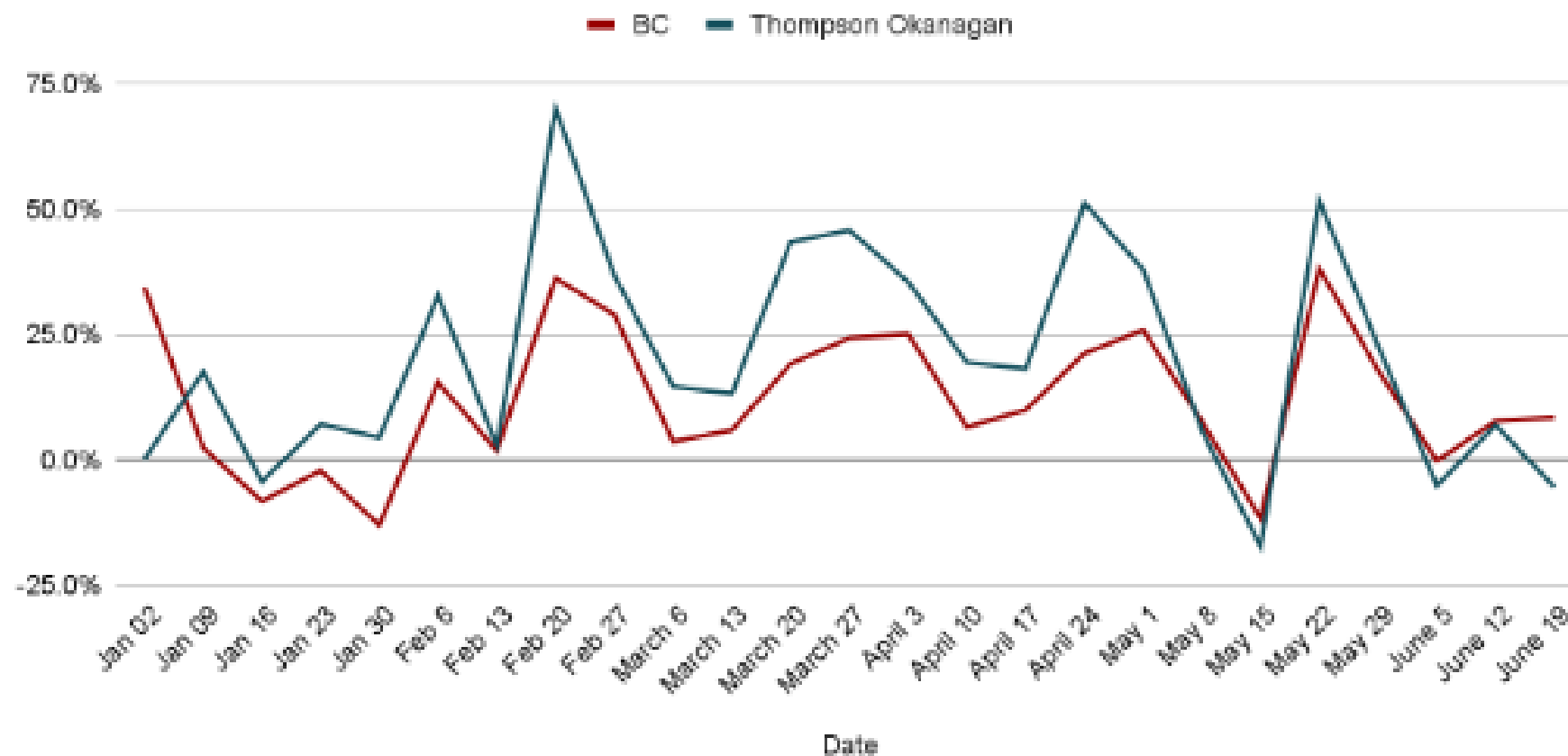
PURPOSE

- The Thompson Okanagan Tourism Association is actively monitoring the impact of COVID-19 on the tourism industry through our partnerships with the BC Regional Tourism Secretariat and the British Columbia Hotel Association
- We are sharing information with our stakeholders through a series called **Research Roundup**, which includes custom reports from our research program and highlights from a variety of sources including:
 - Destination Canada
 - Destination BC
 - Travel and Tourism Research Association
 - Destination Analysts
 - UNWTO
 - BCHA/STR/BCRTS
 - Destination Think
- Learn more about the Thompson Okanagan Tourism Resiliency Program: <https://www.totabc.org/resiliency>



**THOMPSON
OKANAGAN**

DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019 VS. 2022) VARIATION THOMPSON OKANAGAN REGION



Key Findings

- Domestic Overnight Visitation to the Thompson Okanagan for Week 24 (June 13 - June 19, 2022) is **down -5.4%** compared to the same week in 2019
- The Thompson Okanagan saw **13.9% less visitation** when compared to British Columbia Week 24 (June 13 - June 19, 2022)
- Visitation to the Thompson Okanagan **decreased by 12.4%** and British Columbia **increased 0.7%** when comparing Week 23 (June 6 - June 12, 2022) to Week 24 (June 13 - June 19, 2022)

Long Weekends and Holidays:

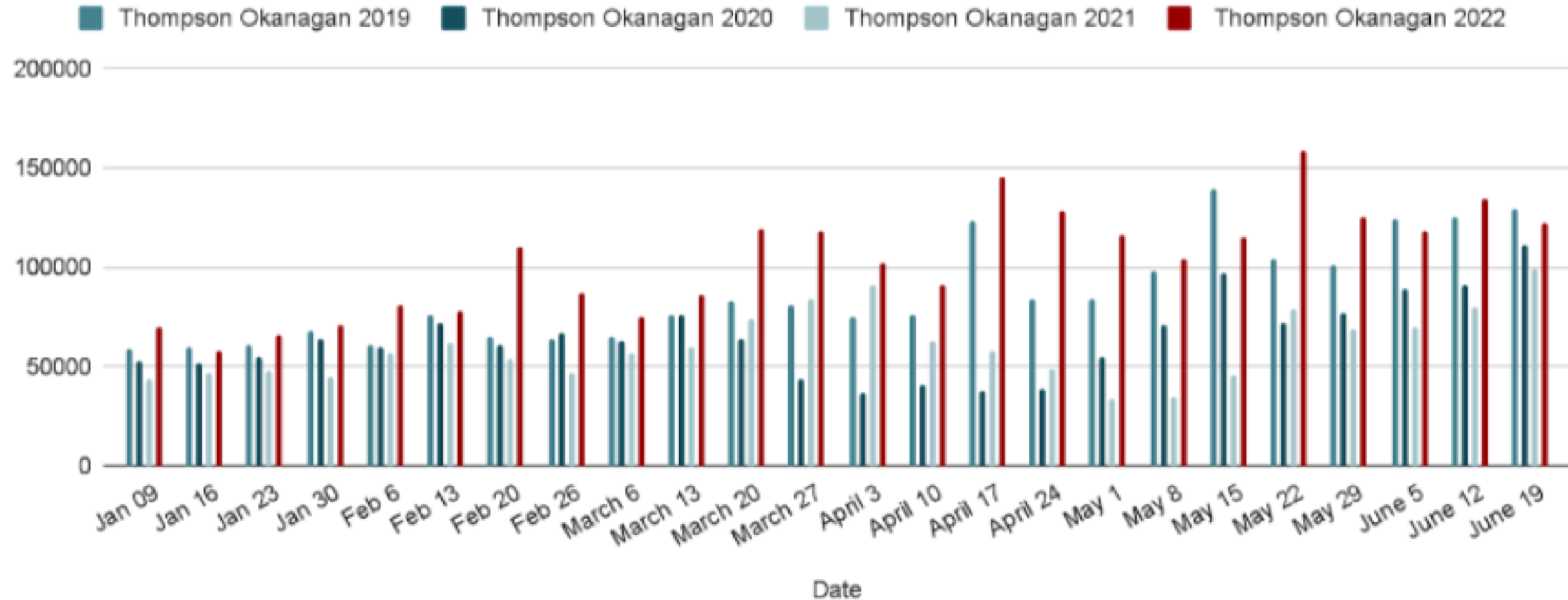
- New Years Day
- Family Day
- Easter
- Victoria Day

4 | Research Roundup

Notes:

- Data is based on the movement of mobile devices travelling within BC from BC or the rest of Canada who have spent one night 60 kms from their mobile device's home location. Therefore it includes all mobile movement - work and contractor travel, relocations within six months' time, visiting friends and relatives and people moving around their own regions.
- The baseline of comparison is 2019, with percentages above 0% indicating higher rates of visitation in 2022 than 2019, and percentages below 0% indicating lower rates of visitation in 2022 than 2019.
- Weekly comparisons may not reflect the exact same date between the two comparison years especially now they are 3 years apart. Therefore holiday weekends may fall on different weeks and result in higher peaks in the current year.

DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021, 2022) VARIATION THOMPSON OKANAGAN REGION



**BRITISH
COLUMBIA**

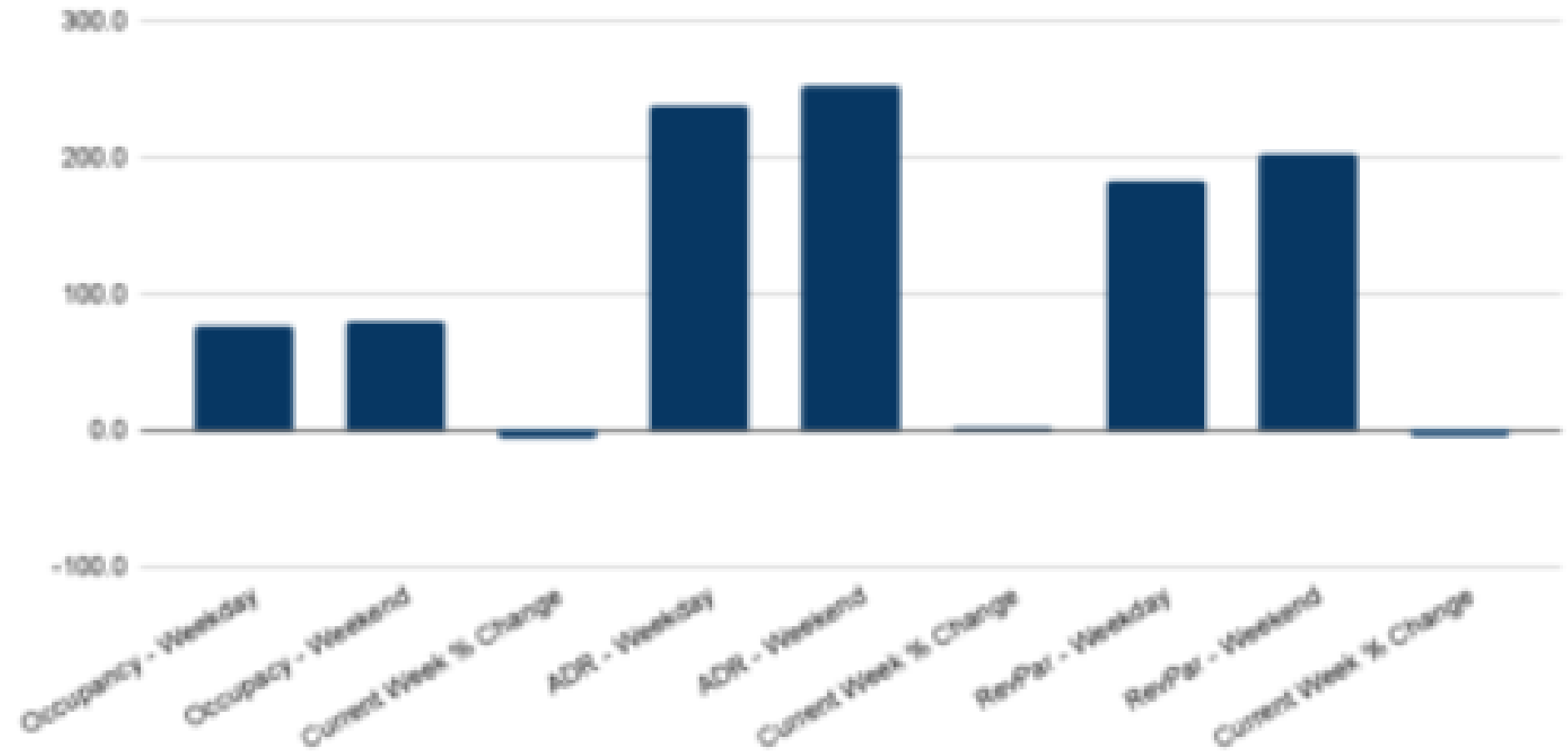
STR SUMMARY BC & REGIONS

JUNE 12 - JUNE 18, 2022

- British Columbia had a **76.5%** occupancy from Sunday-Thursday and a **79.8%** occupancy during the weekend, down **-6.3%** compared to the same week in 2019.
- British Columbia had an ADR of **\$238.10** from Sunday-Thursday and an ADR of **\$252.82** during the weekend, up **2.5%** compared to the same week in 2019.
- British Columbia had a RevPAR of **\$182.17** from Sunday-Thursday and a RevPAR of **\$201.65** during the weekend, down **-3.9%** compared to the same week in 2019.

Regional STATS the Weekend of June 17-18, 2022:

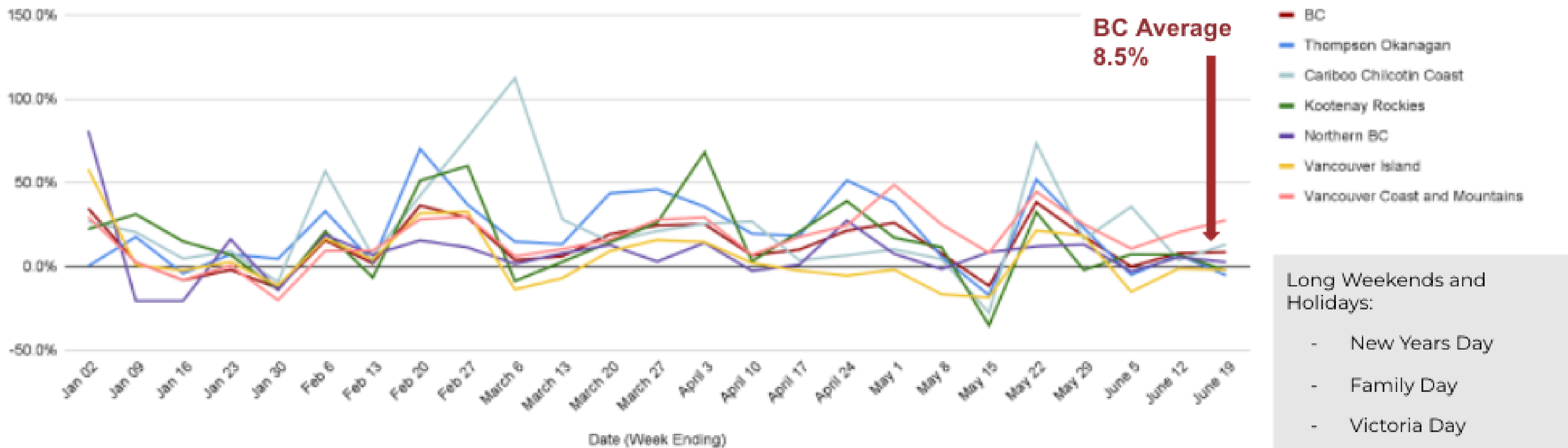
- Cariboo Chilcotin Coast: OCC **67.5%** ADR **\$150.40** REVPAR **\$101.48**
- Kootenay Rockies: OCC **72.8%** ADR **\$176.14** REVPAR **\$128.18**
- Northern BC: OCC **60.7%** ADR **\$129.43** REVPAR **\$78.52**
- Thompson Okanagan: OCC **76.2%** ADR **\$195.15** REVPAR **\$148.65**
- Whistler: OCC **59.1%** ADR **\$322.77** REVPAR **\$190.84**
- Vancouver Island: OCC **83.8%** ADR **\$279.08** REVPAR **\$233.93**
- Vancouver: OCC **87.8%** ADR **\$290.53** REVPAR **\$255.13**



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DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019 VS. 2022) VARIATION

B.C REGIONS



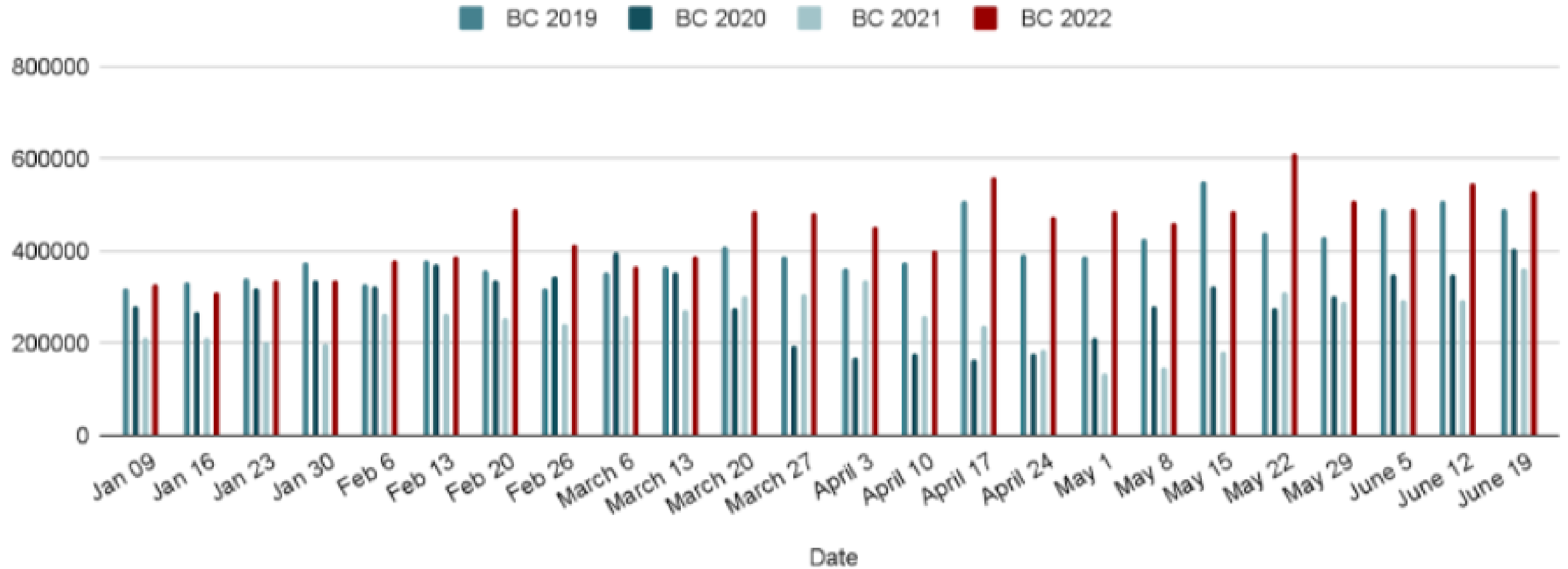
Key Findings

- Average Domestic Overnight Visitation to BC for Week 24 (June 13 - June 19, 2022) is **up 8.5%** compared to the same week in 2019
- When comparing Week 23 (June 6 - June 12, 2022) to Week 24 (June 13 - June 19, 2022) Cariboo Chilcotin Coast, and Vancouver Coast and Mountains saw an **increase** in visitation. Thompson Okanagan, Kootenay Rockies, Northern BC, Vancouver Island, saw a **decrease**
- British Columbia **increased 0.7%** when comparing Week 23 (June 6 - June 12, 2022) to Week 24 (June 13 - June 19, 2022)

Notes:

- Data is based on the movement of mobile devices travelling within BC from BC or the rest of Canada who have spent one night 60 kms from their mobile device's home location. Therefore it includes all mobile movement - work and contractor travel, relocations within six months' time, visiting friends and relatives and people moving around their own regions.
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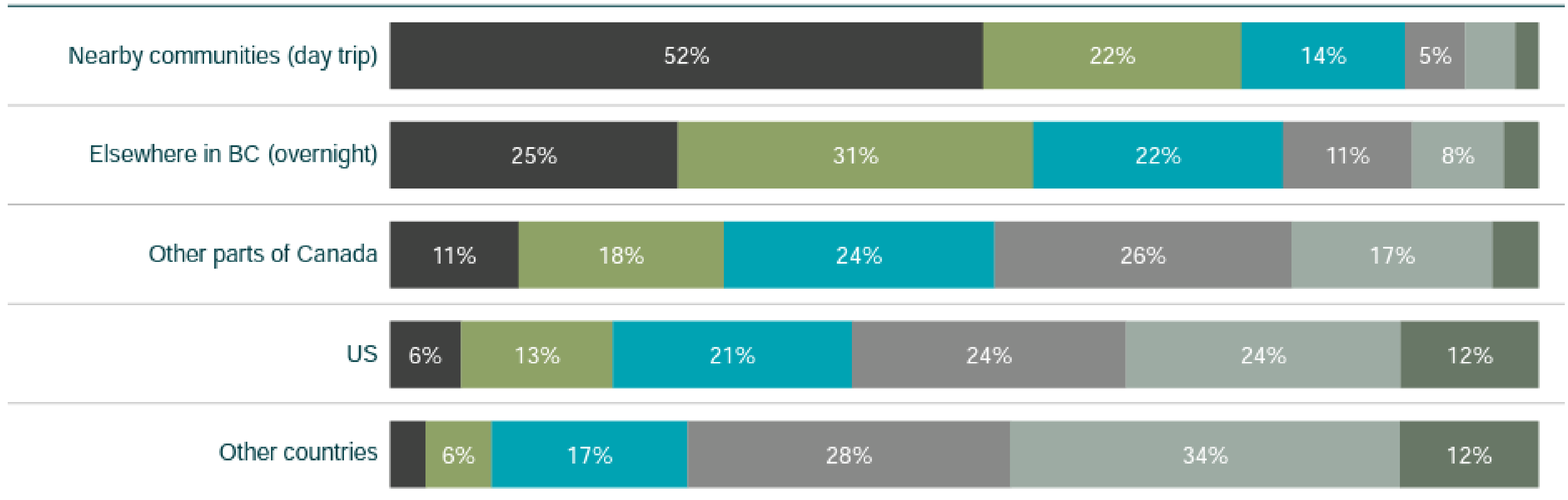
DOMESTIC OVERNIGHT VISITORS - WEEKLY YEAR OVER YEAR (2019, 2020, 2021, 2022) VARIATION BRITISH COLUMBIA



SNAPSHOT OF BRITISH COLUMBIA RESIDENTS' TRAVEL INTENTIONS

WAVE 47 - JUNE 10, 2022

When, if at all, are you likely to make trips to the following destinations?



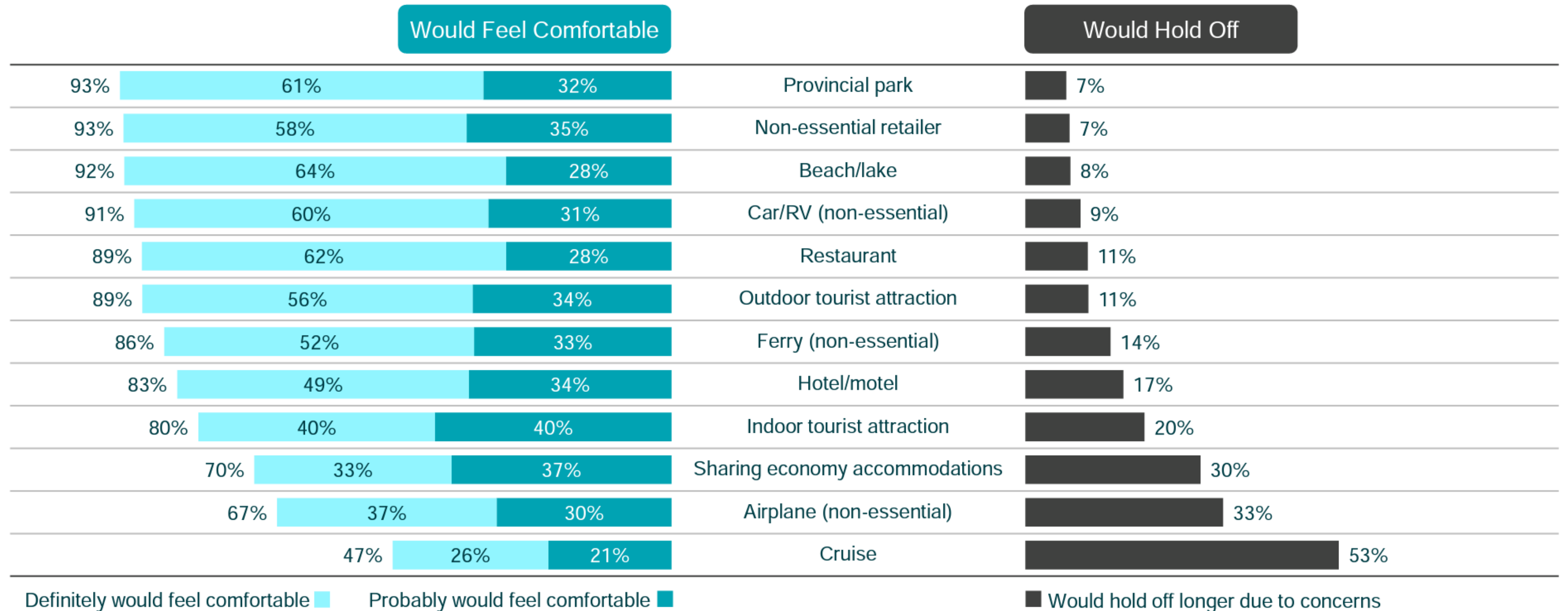
Within next 4 weeks
 2-3 months from now
 4-12 months from now
 Within 2 years
 Not sure, but longer than 2 years
 Never

Base: All respondents

Due to rounding, the sum of the individual values shown may not add up to 100%

SNAPSHOT OF BRITISH COLUMBIA RESIDENTS' COMFORT LEVELS WITH ACTIVITIES, TRANSPORTATION AND ACCOMMODATION

WAVE 47 - JUNE 10, 2022



Base: All respondents, excluding not applicable/don't do this in general and not applicable/wouldn't do this at this time of year
 D1. Would you be comfortable doing/using each of the following in the next few weeks, or are you likely to hold off longer due to concerns about COVID-19?
 Due to rounding, the sum of the individual values shown may not add up to the total shown.

2021 BC PRIZM SEGMENT SUMMARY

ENCLAVES MULTIETHNIQUES

General Canadian Summary

- Diverse, downscale city singles and families. More than 35% are French Speaking
- Moderate Education (Grade 9/Trade School)
- Service Sector Positions
- Enjoy large communal experiences and a range of media, often accessed through mobile devices
- Top Geography: Montréal
- EQ Type: Cultural History Buff



Source: Environics PRIZM Marketer's Guide 2021

Category

British Columbia Highlights

Household Count

Of the 67 PRIZM Clusters identified in Canada, Enclaves Multiethniques rank 52nd, making up 2,786 households, or 0.1% of the total Households in British Columbia (2,018,734).

Maintainer Age

Median Household Maintainer Age is 45

Children at Home

44.7% of couples have children living at home (Average).

Household Income

Below Average Household Income of \$63,620 compared to BC at \$113,574.

Top Social Values

Patriarchy, Fatalism, and Penchant for Risk

Top Tourism Activities

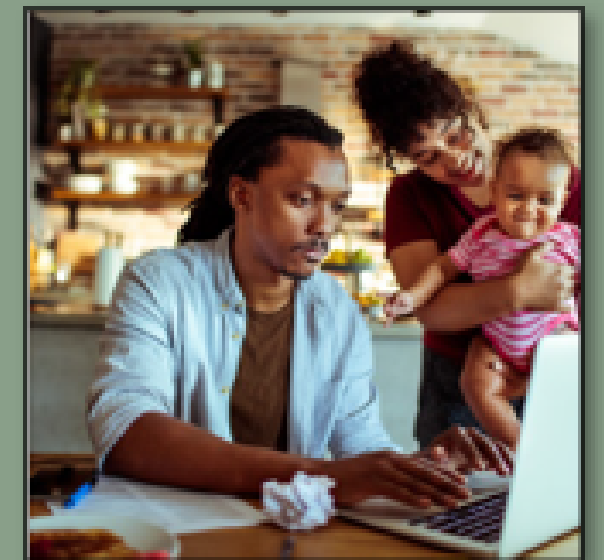
Swimming, Camping, and Hiking/Backpacking. Above Average interest in Video Arcades/Indoor Amusement Centres, Zoos/Aquariums, and Curling.

Travel

Below Average interest for travelling within Canada (Above Average for Newfoundland & Labrador), Enclaves Multiethniques from British Columbia spent an average of \$1592 (Average) on their last vacation.

Social Media

76.4% currently use Facebook, 49.1% use Instagram (Above Average), 35% use Twitter (Above Average), and 79.3% use YouTube (Above Average).



COVID-19 MOBILITY COMMUNITY REPORT- GOOGLE INSIGHTS

WEEK OF JUNE 24, 2022 - BC

- Retail & recreation traffic is up **+5%** compared to the same period in 2020
 - Includes restaurants, cafes, shopping centres, theme parks, museums, and libraries.
- Grocery & pharmacy traffic is up **+13%** compared to the same period in 2020
 - Includes grocery markets, food warehouses, farmers markets, speciality food shops, drugstores, and pharmacies.
- Parks traffic is up **+160%** compared to the same period in 2020
 - Includes national parks, public beaches, marinas, dog parks, and public gardens.
- Transit station traffic is down **-16%** compared to the same period in 2020
 - Includes subway, bus, and train stations.
- Workplace traffic is down **-22%** compared to the same period in 2020.
- Residential traffic is up **+1%** compared to the same period in 2020



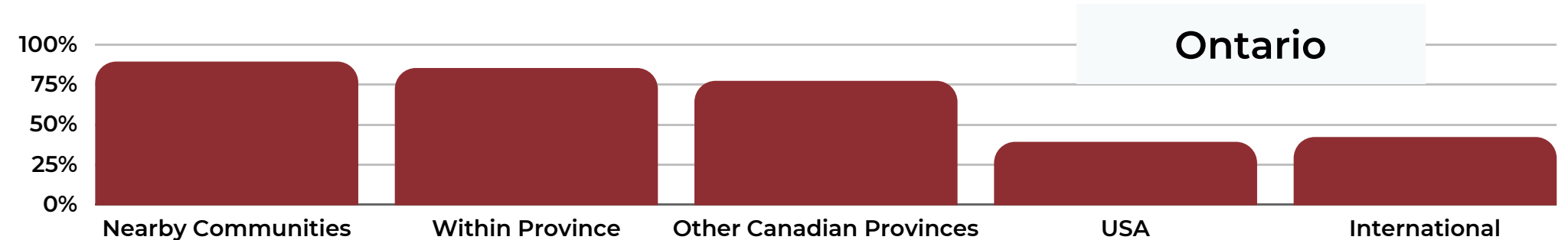
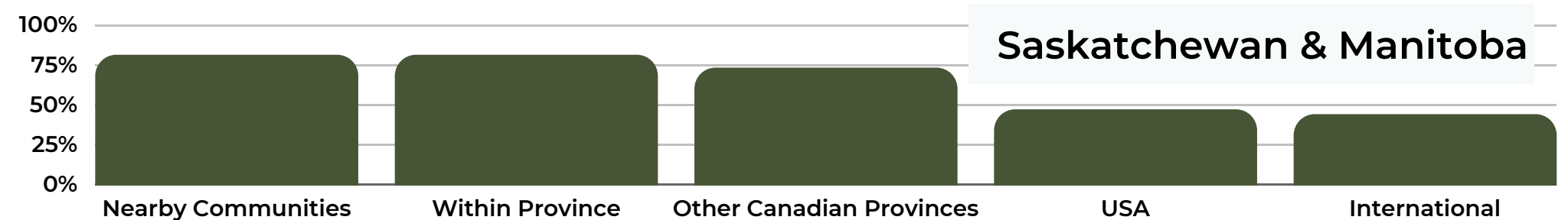
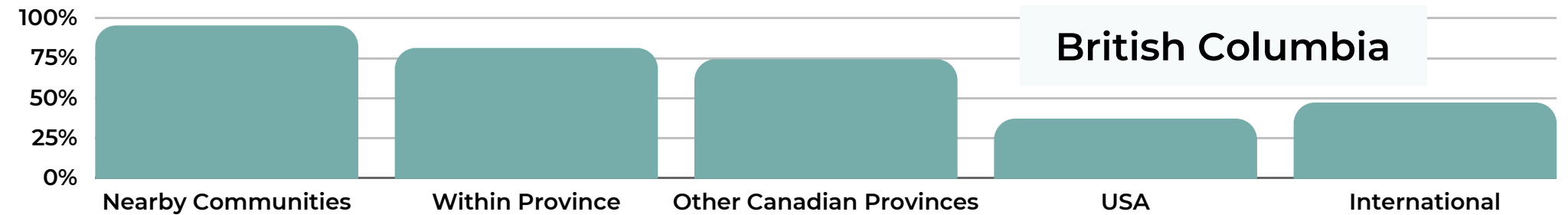
CANADA AND AMERICA

CANADIAN RESIDENT SENTIMENT TOWARDS TRAVEL

"I FEEL SAFE TO TRAVEL"

Destination Canada's June 2, 2022 sentiment towards travel shows:

- **95%** of B.C. residents feel safe travelling to communities near them, compared to **88%** of Alberta travellers, **81%** of SK & MB travellers, and **89%** of Ontario travellers.
- **81%** of B.C. residents feel safe travelling to communities within their Province, compared to **87%** of Alberta travellers, **81%** of SK & MB travellers, and **85%** of Ontario travellers.
- **74%** of B.C. residents feel safe travelling to other provinces within Canada, compared to **82%** of Alberta travellers, **73%** of SK & MB travellers, and **77%** of Ontario travellers.
- **37%** of B.C. residents feel safe travelling to the United States, compared to **52%** of Alberta travellers, **47%** of SK & MB travellers, and **39%** of Ontario travellers.
- **41%** of B.C. residents feel safe travelling Internationally, compared to **49%** of Alberta travellers, **42%** of SK & MB travellers, and **42%** of Ontario travellers



AMERICAN TRAVEL - THE ROLE OF PSYCHOGRAPHICS, HIGH PRICES AND AD IMAGERY

JUNE 6, 2022

High travel prices are having an impact although travel demand remains strong. Travellers still get their heartstrings pulled by landscape and sunset images in travel advertising. As always, marketers would be wise to dig deeper into psychographics to target their most fruitful audiences.

With the peak summer travel season begun, more Americans are agreeing it's a good time to spend money on travel (33.4%). Additionally, 61.7% per cent say that leisure travel will be a high spending priority – the highest level it's been since July 2021. Yet inflation and prices are indeed having an impact. The percentage of American travellers saying that if gas prices don't come down, they will take fewer road trips this summer (61.1%) and/or stay closer to home (63.0%) both increased 3 percentage points. High travel prices as an impediment to travel also climbed 3-points in the last month to 41.8%. 30.1% say they have cancelled a trip they had planned or considered because of high prices. When asked to rate how much a deterrent specific travel costs are, the two most commonly seen as “deal breakers” are gas (22.9%) and airfare (11.8%)

Americans are splintering again on Covid. Although a larger proportion of Americans feel optimistic about how the Covid situation will progress in the next month (32.3%), a growing proportion now feel it will worsen (up to 25.3% from 21.5% last month). More also feel that the virus is impacting their ability to have meaningful travel experiences (up 5-points in the last month to 38.2%).

IMPORTANT: These findings are brought to you from our independent research, which is not sponsored, conducted or influenced by any advertising or marketing agency. The key findings presented below represent data from over 4,000 American travelers collected in May 2022.



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