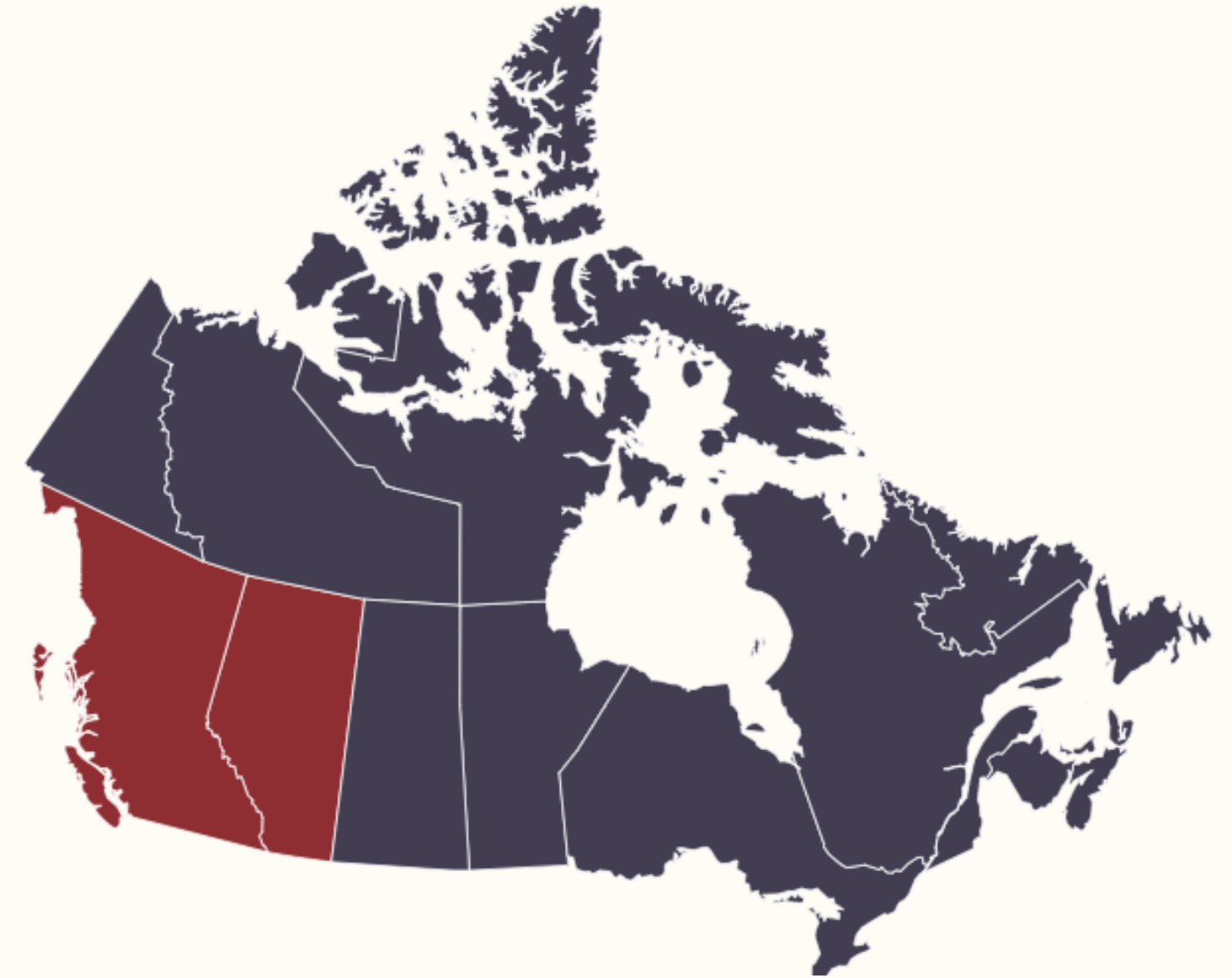


2020 VISITOR INSIGHTS

KOOTENAY ROCKIES REGION

PURPOSE

- As the tourism industry navigates through the global pandemic of COVID-19, the British Columbia Regional Tourism Secretariat (BCRTS) will provide baseline research to support the industry
- Baseline visitor analysis will help industry understand who is visiting our regions so they can plan strategically to attract visitors who will support their recovery
- The program has commenced with the **BC Market** as the top priority to coincide with the PHO travel recommendations for British Columbia, followed by the **Alberta Market**
- This report focuses on visitor analysis to the **Kootenay Rockies Region**



SUMMARY

- In 2018 the Kootenay Rockies Region saw an average of 1,204,400 Domestic Visitors. In 2019 the Region saw 1,296,800 Domestic Visitors and in 2020 919,100 Domestic Visitors. A decrease of 24% compared to 2018 visitation and 29% compared to 2019 visitation.
- April 2020 saw the lowest number of Canadian travellers visiting the Kootenay Rockies Region. Decreasing by 63% when compared to April 2018 and 64% when compared to April 2019.

British Columbia Highlights

- The top Visitor Origin Locations of BC travellers visiting the Kootenay Rockies Region in 2018, 2019 and 2020 were: Vancouver, Kelowna and Surrey
- The top PRIZM Segments of BC Travellers to the Kootenay Rockies Region in 2018, 2019 and 2020 were: Country & Western, Suburban Sports and Scenic Retirement
- The top EQ Types of BC Travellers to the Kootenay Rockies Region in 2018, 2019 and 2020 were: Gentle Explorers, Rejuvenators and Authentic Experiencers

Alberta Highlights

- The top Visitor Origin Locations of Alberta travellers visiting the Kootenay Rockies Region in 2018, 2019 and 2020 were: Calgary, Edmonton, Airdrie and Lethbridge
- The top PRIZM Segments of Alberta Travellers to the Kootenay Rockies Region in 2018, 2019 and 2020 were: Modern Suburbia, All-Terrain Families and Family Mode
- The top EQ Types of Alberta Travellers to the Kootenay Rockies Region in 2018, 2019 and 2020 were: Free Spirits, Authentic Experiencers and No Hassle Travellers

RESEARCH OVERVIEW

- Environics Analytics is a Canadian based research firm providing information solutions for a variety of industries in both the Canadian and USA Markets
- Visitor View Canada provides insights the tourism industry needs to understand, market to and grow their business with Canadian travellers
- Visitor View produces neighborhood-level estimates of overnight Canadian visitors to **Canada**, the **provinces** and **territories**, or one of Canada's **85 tourism regions** as defined by Destination Canada
- 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
- Visitor View is based on anonymized, consent-based mobile location data Monthly, quarterly and annual estimate data is available starting with January 2018 to allow for analysis of historical trends

Methodology

- **Visits:** 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)

HOW CAN VISITOR VIEW HELP YOU?

- Measure the effectiveness of your marketing strategies on Canadian Visitors, the Canadian travel and tourism industry and understand the impact of the worldwide COVID-19 pandemic as it relates to Visitors, Number of Trips and Number of Overnight Stays within **Canada**, its **provinces**, **territories**, and **tourism regions**
- Using Visitor View we can compare the number of visitors and their travel patterns by month in 2018, 2019 and 2020
- We can also compare different regions to assess the impact of the pandemic on Canadian travel patterns and identify when visitors start to return to British Columbia's respective tourism regions
- Identify the best regions and neighborhoods in Canada to prospect for new visitors and use the PRIZM Segmentation System to optimize experience development and marketing



CANADA INSIGHTS

YEAR OVER YEAR PROVINCIAL VISITATION COMPARISON



Note: British Columbia declared a provincial state of emergency on Wednesday, March 18, 2020 as a result of the COVID-19 Global Pandemic.

Overview

2018 Domestic Visitation vs. 2020 Domestic Visitation

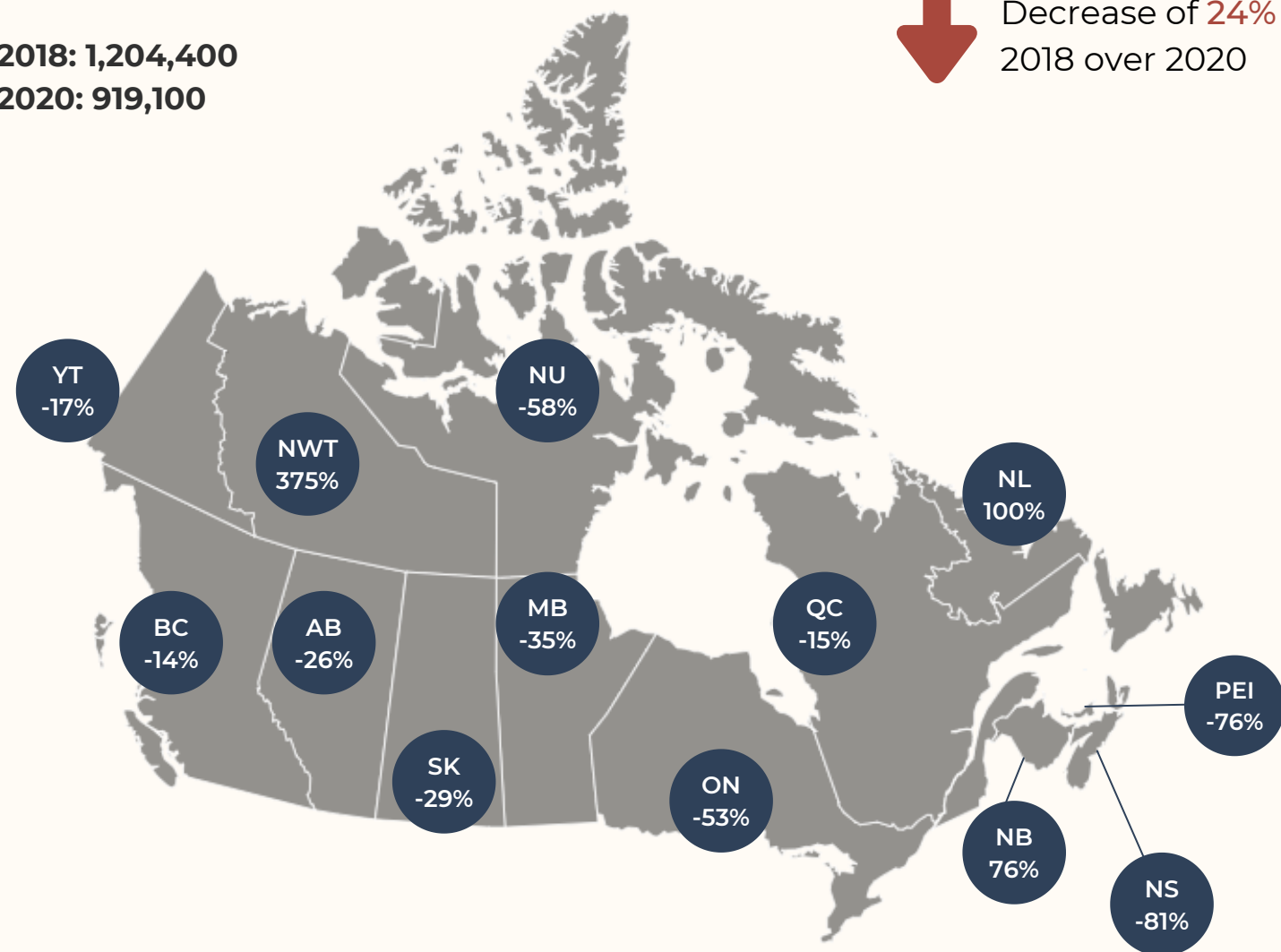
2019 Domestic Visitation vs. 2020 Domestic Visitation

- In 2018 the Kootenay Rockies Region saw an average of 1,204,400 Domestic Visitors. In 2019 the Region saw 1,296,800 Domestic Visitors and in 2020 919,100 Domestic Visitors. A **decrease of 24%** compared to 2018 visitation and **29%** compared to 2019 visitation.
- 2020 saw a **decrease** in visitation from every Province, with the exception of the Northwest Territories, up 375% (although visitation counts were still minimal), and New Brunswick, up 76%. There was no ranking visitation from Newfoundland in 2018, resulting in a total increase in 2020.
- Visitation from all provinces decreased in 2020 when compared to 2019.

Yearly visitors to the Kootenay Rockies 2018 vs. 2020

2018: 1,204,400
2020: 919,100

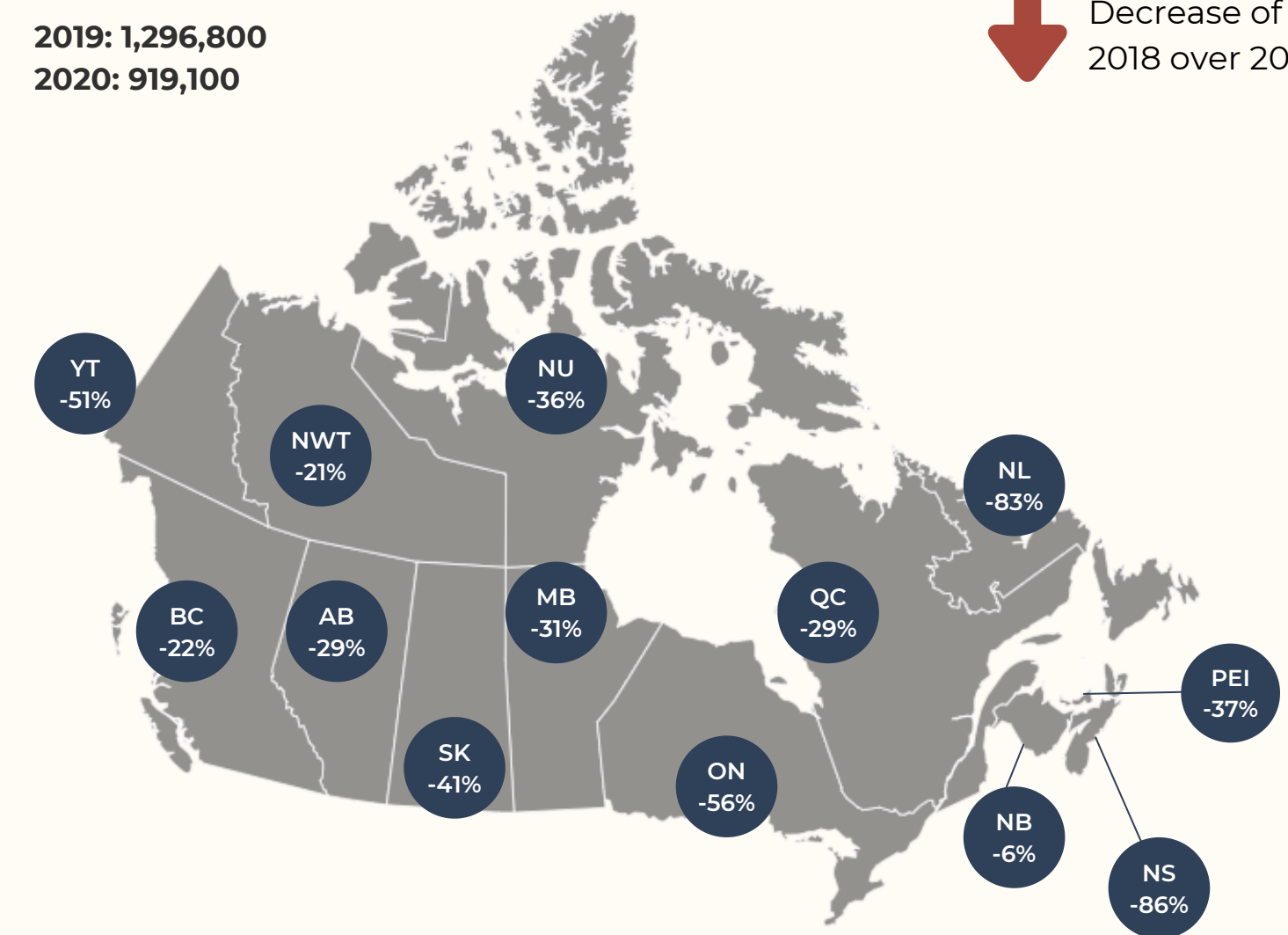
Canada
Decrease of **24%**
2018 over 2020



Yearly visitors to the Kootenay Rockies 2019 vs. 2020

2019: 1,296,800
2020: 919,100

Canada
Decrease of **29%**
2018 over 2020



*All Percentages relate to an increase or decrease in yearly Visitor Counts when comparing 2018 and 2019 to 2020

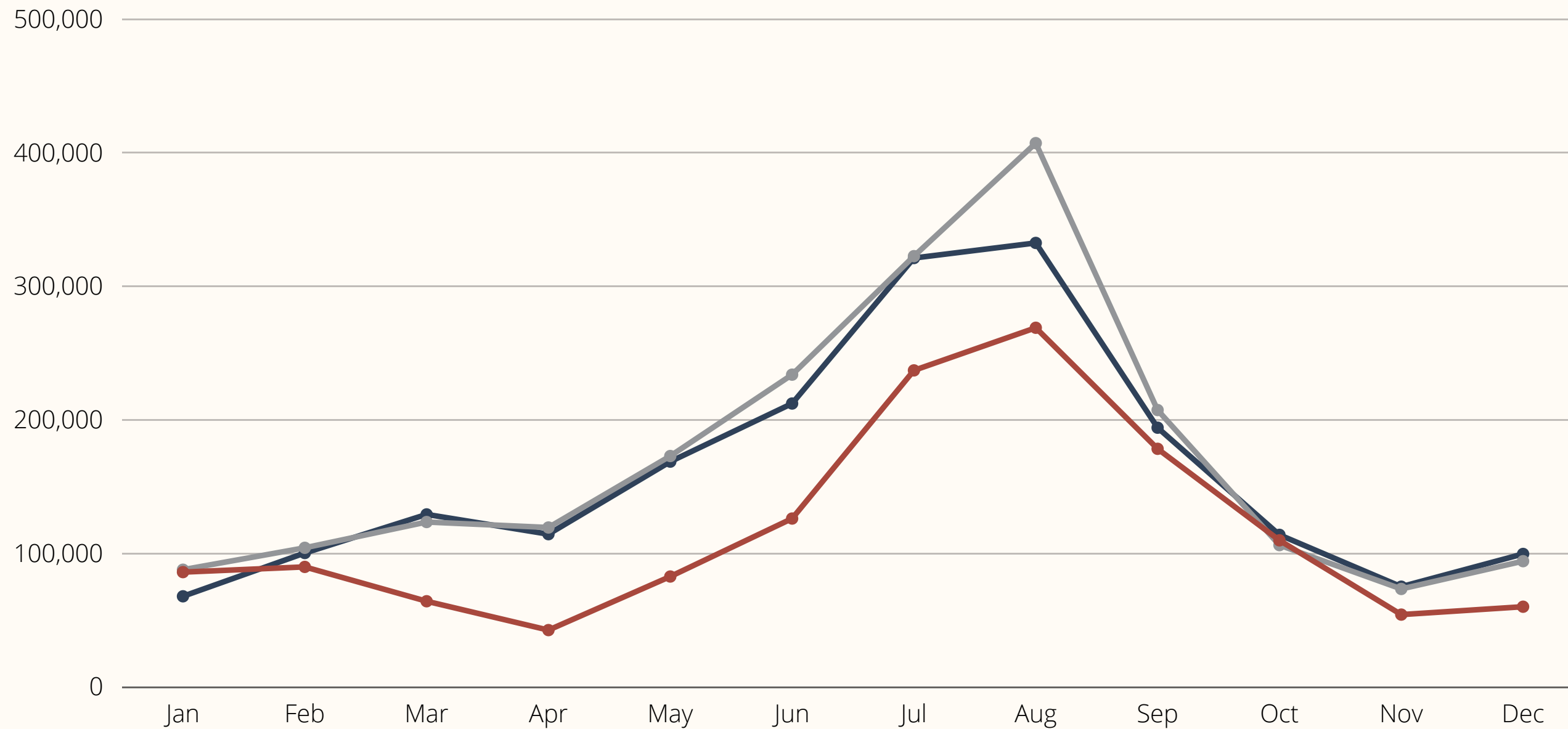
Note: A Visitor is defined as someone who travels 60+ km from their point of origin, counts may include Kootenay Rockies resident visitors depending on point of origin and point of destination



CANADIAN VISITATION



CANADIAN VISITORS TRAVELLING TO THE KOOTENAY ROCKIES BY MONTH



KEY FINDINGS

- April 2020 saw the lowest number of Canadian travellers visiting the Kootenay Rockies Region. Decreasing by **63%** when compared to April 2018 and **64%** when compared to April 2019.
- August 2020 saw the highest number of Canadian travellers visiting the Kootenay Rockies Region.
- While visitation to the Kootenay Rockies Region from Canadian Travellers is significantly down when compared to 2018 and 2019, an upward trend in visitors is apparent May-August 2020.

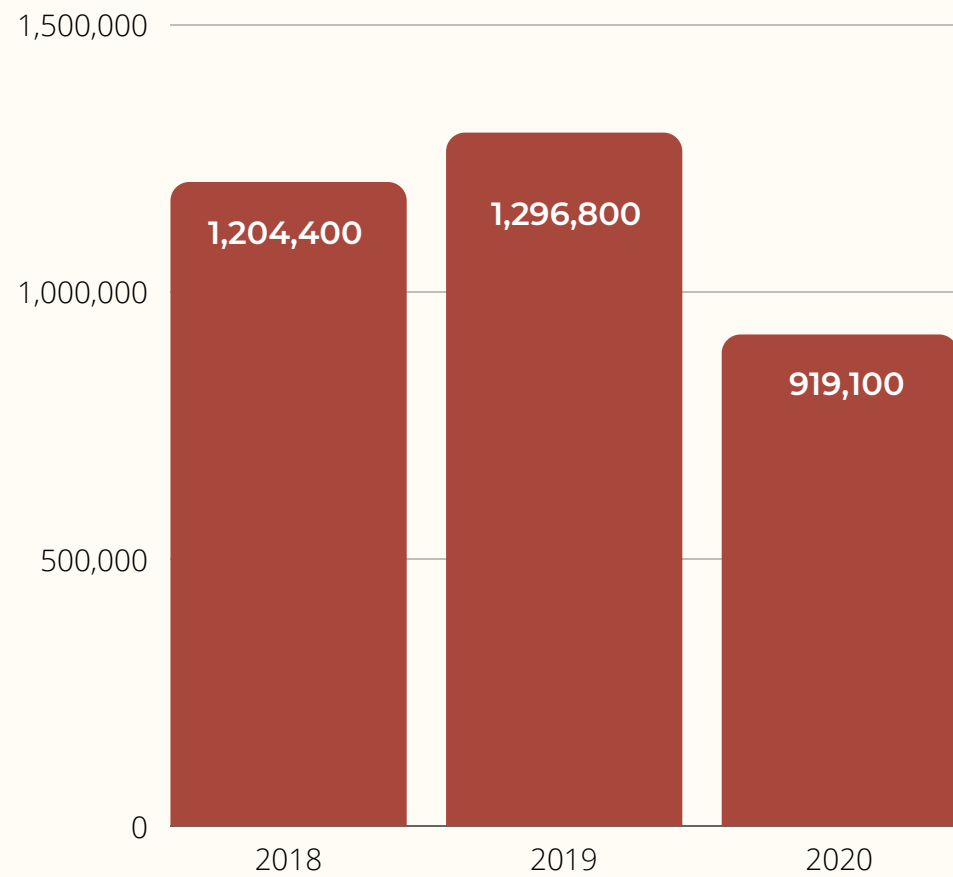
Note: British Columbia declared a provincial state of emergency on **Wednesday, March 18, 2020** as a result of the COVID-19 Global Pandemic.

KEY MARKET VISITATION

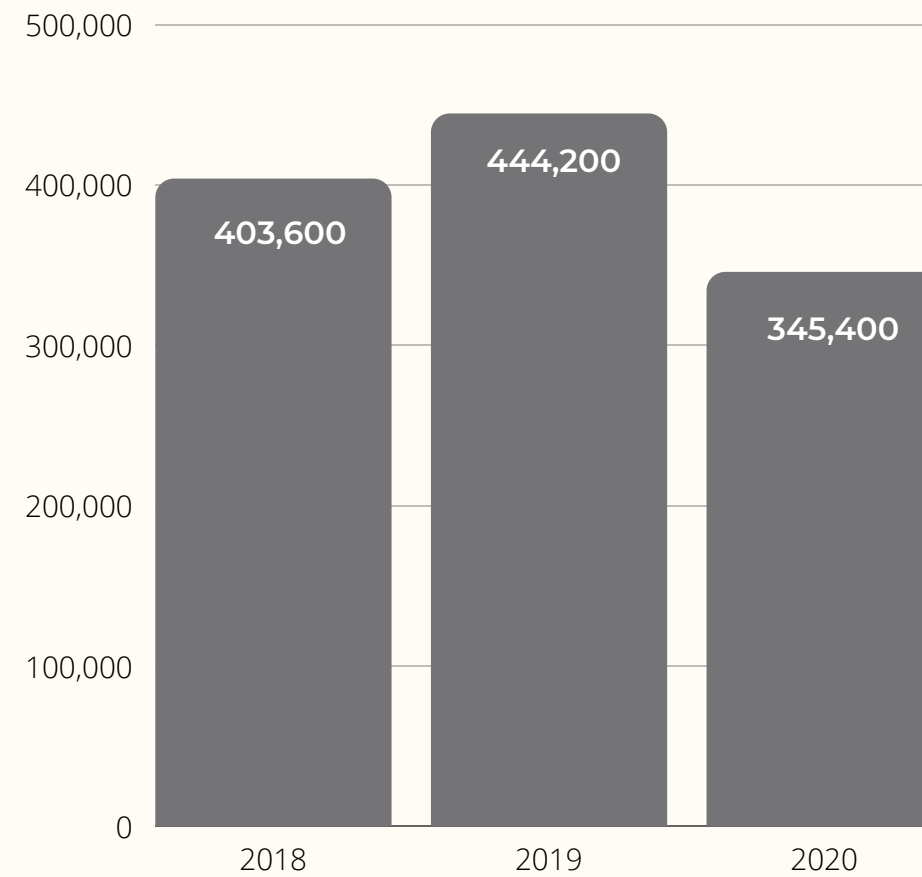
CANADA, BC AND ALBERTA VISITORS TRAVELLING TO THE KOOTENAY ROCKIES YEAR OVER YEAR



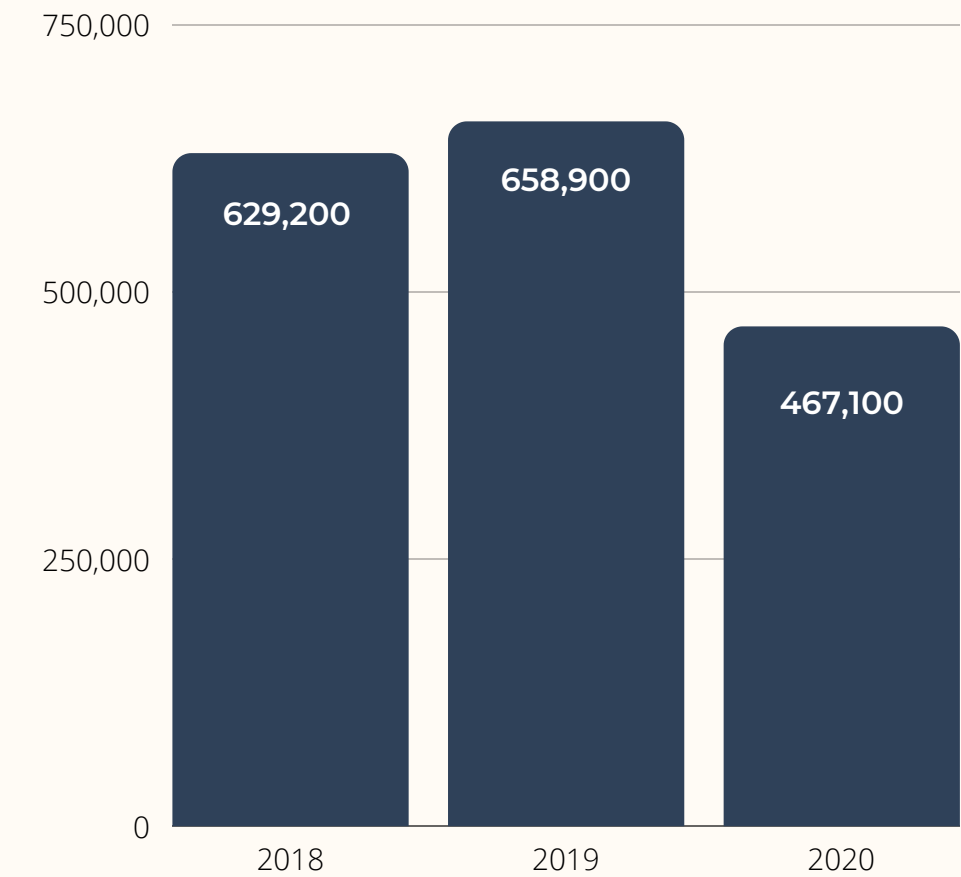
Number of Visitors to the Kootenay Rockies from Canada Year over Year



Number of Visitors to the Kootenay Rockies from BC Year over Year



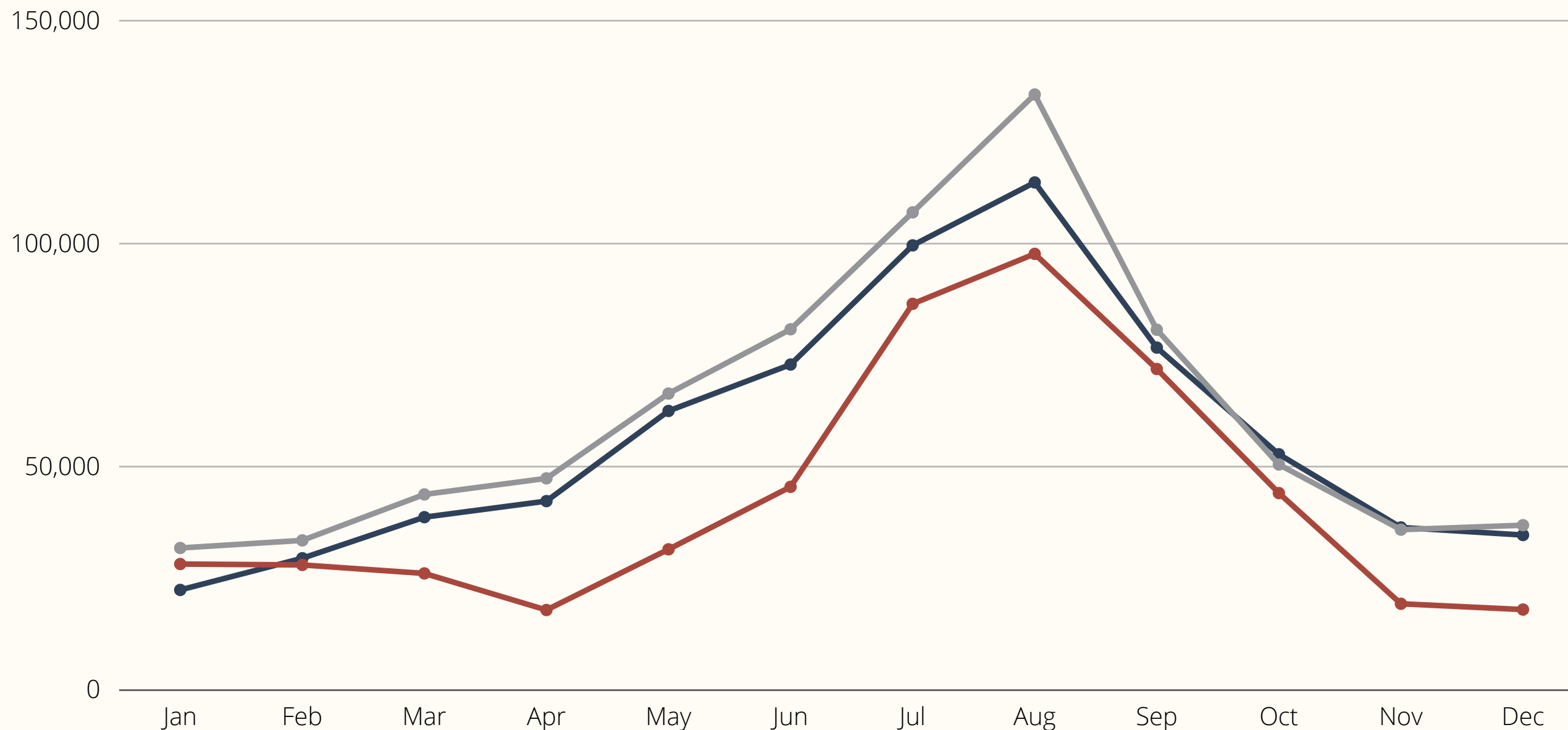
Number of Visitors to the Kootenay Rockies from Alberta Year over Year



BRITISH COLUMBIA INSIGHTS

BRITISH COLUMBIA VISITATION

BC VISITORS TRAVELLING TO THE KOOTENAY ROCKIES BY MONTH



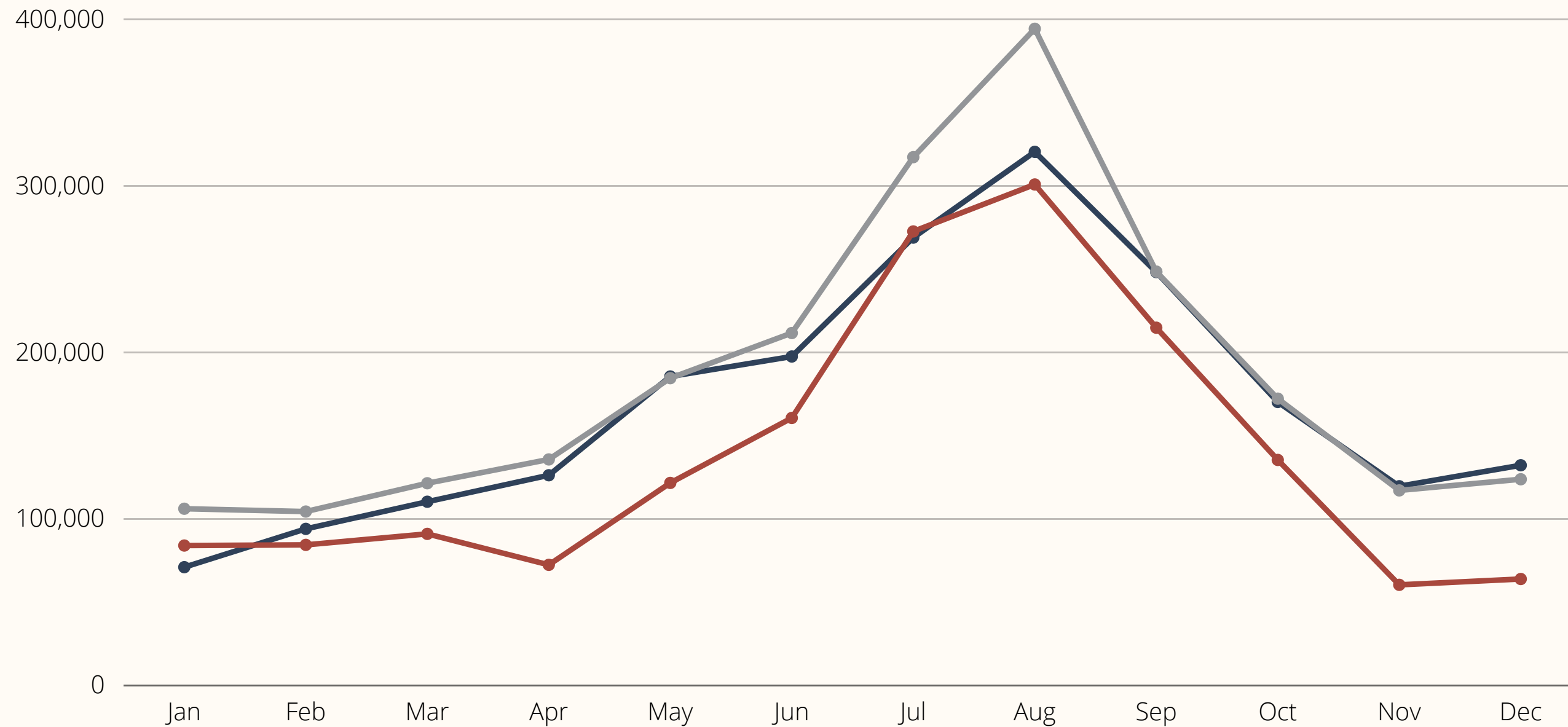
KEY FINDINGS

- April 2020 saw the lowest number of BC travellers visiting the Kootenay Rockies Region. Decreasing by **58%** when compared to April 2018 and **62%** when compared to April 2019.
- August 2020 saw the highest number of BC travellers visiting the Kootenay Rockies Region.
- While visitation to the Kootenay Rockies Region from BC Travellers is significantly down when compared to 2018 and 2019, an upward trend in visitors is apparent May-August 2020.

Note: British Columbia declared a provincial state of emergency on **Wednesday, March 18, 2020** as a result of the COVID-19 Global Pandemic.

BRITISH COLUMBIA VISITATION

BC TRIPS TO THE KOOTENAY ROCKIES BY MONTH



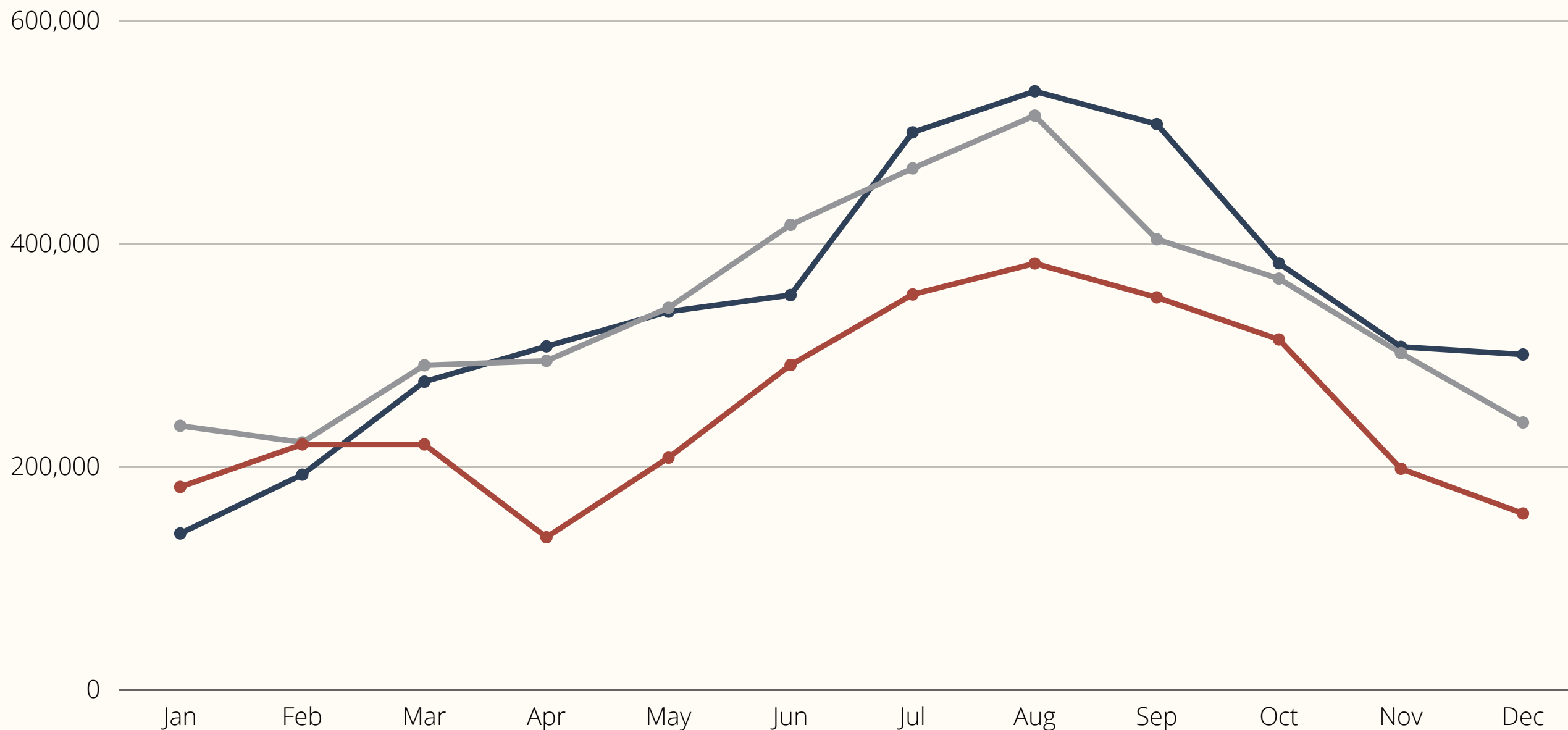
KEY FINDINGS

- April 2020 saw the lowest number of BC Trips to the Kootenay Rockies Region. Decreasing by **54%** when compared to April 2018 and **59%** when compared to April 2019.
- August 2020 saw the highest number of BC Trips to the Kootenay Rockies Region.
- While trips to the Kootenay Rockies Region from BC Travellers are significantly down compared to 2018 and 2019, an upward trend in number of trips is apparent May-August 2020.

Note: British Columbia declared a provincial state of emergency on **Wednesday, March 18, 2020** as a result of the COVID-19 Global Pandemic.

BRITISH COLUMBIA VISITATION

BC OVERNIGHT STAYS IN THE KOOTENAY ROCKIES BY MONTH



KEY FINDINGS

- April 2020 saw the lowest number of BC travellers staying overnight in the Kootenay Rockies Region. Decreasing by **43%** when compared to April 2018 and **47%** when compared to April 2019.
- August 2020 saw the highest number of BC Travellers staying overnight in the Kootenay Rockies Region.
- While Overnight Stays in the Kootenay Rockies Region from BC Travellers is significantly down compared to 2018 and 2019, an upward trend in Overnight Stays is apparent May-August 2020.

Note: British Columbia declared a provincial state of emergency on **Wednesday, March 18, 2020** as a result of the COVID-19 Global Pandemic.

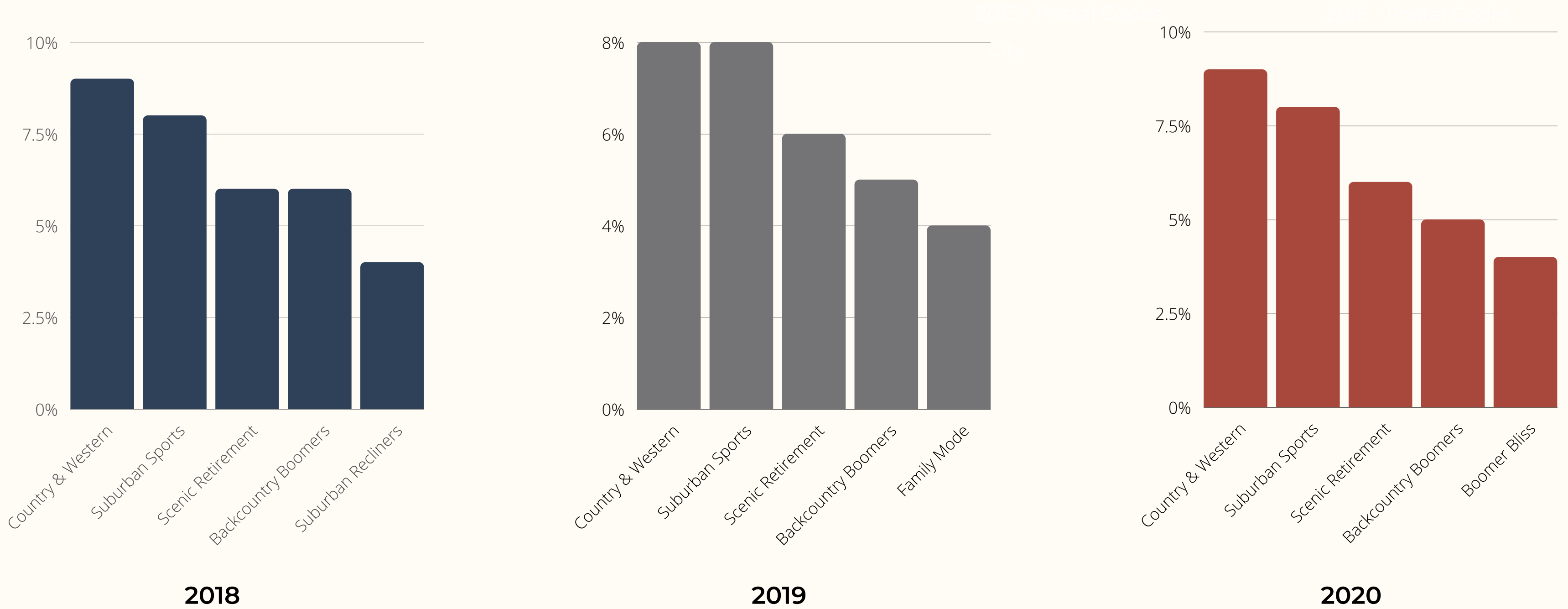
ORIGIN OF BC TRAVELLERS

TOP ORIGIN CITIES OF THOSE TRAVELLING TO THE KOOTENAY ROCKIES FROM BC BY YEAR

City	2018 Visitor Count	City	2019 Visitor Count	City	2020 Visitor Count
Vancouver	33,800	Vancouver	39,500	Vancouver	26,200
Kelowna	24,900	Kelowna	30,400	Kelowna	25,500
Surrey	22,900	Surrey	25,700	Surrey	22,700
Kamloops	14,200	Kamloops	16,000	Kamloops	13,500
Vernon	10,400	Abbotsford	11,800	Abbotsford	9,300
Cranbrook	9,900	Burnaby	11,600	Vernon	9,000
Burnaby	9,900	Richmond	9,900	Burnaby	8,000
Abbotsford	9,500	Cranbrook	9,900	Cranbrook	8,000
Richmond	8,400	Vernon	9,300	Richmond	7,000
Saanich	7,300	Coquitlam	7,800	Langley	5,900

TOP PRIZM SEGMENTS OF BC TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020



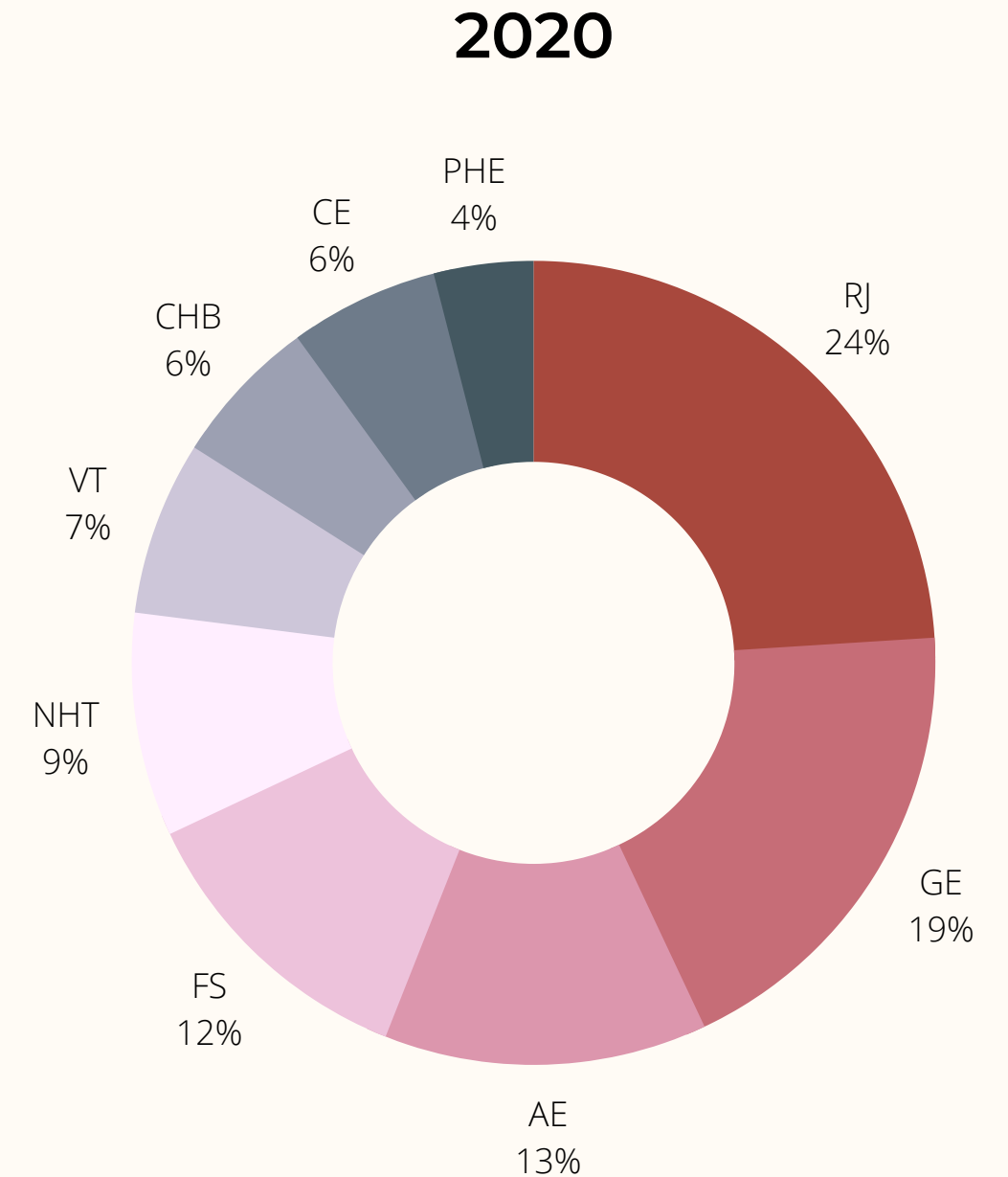
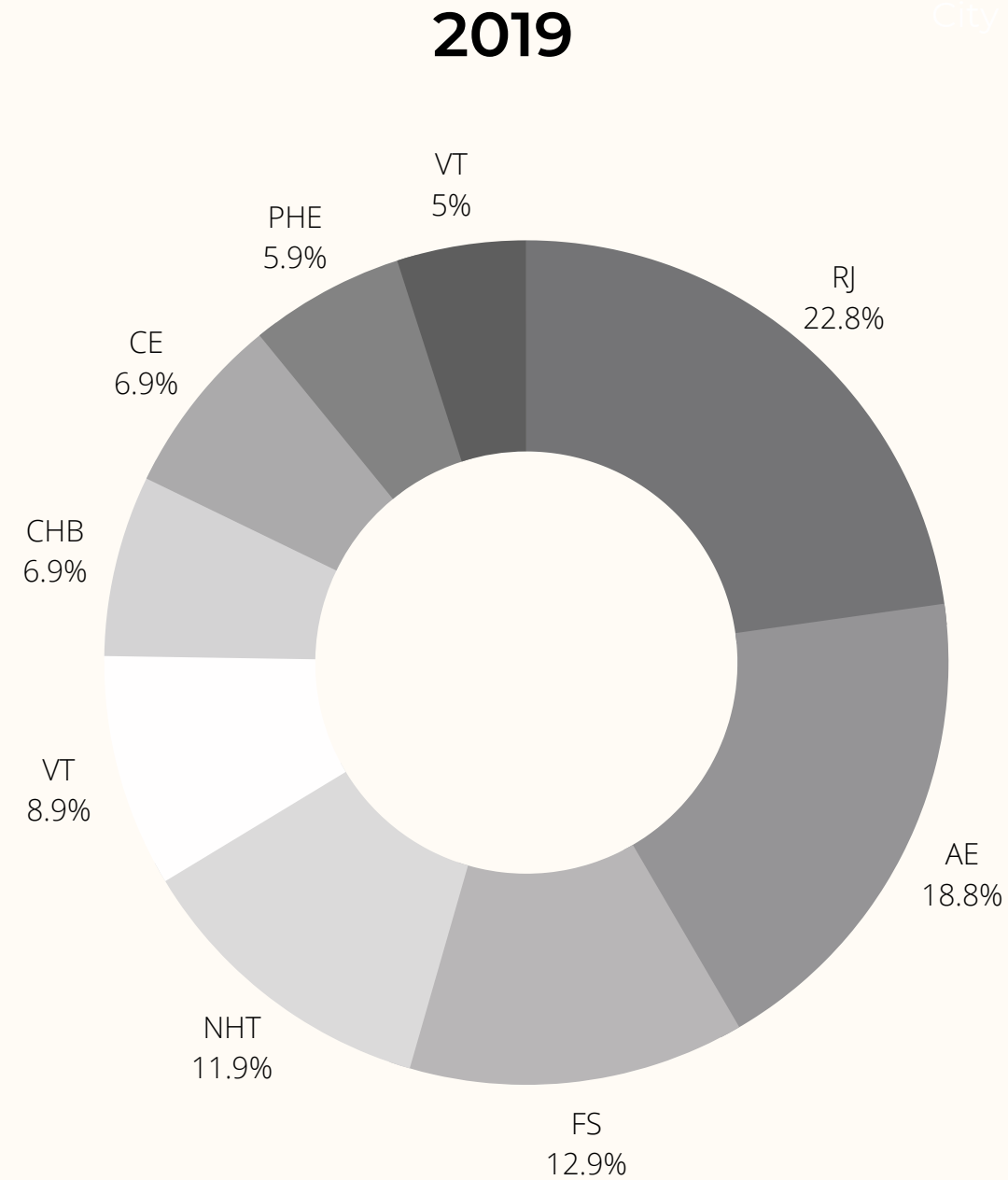
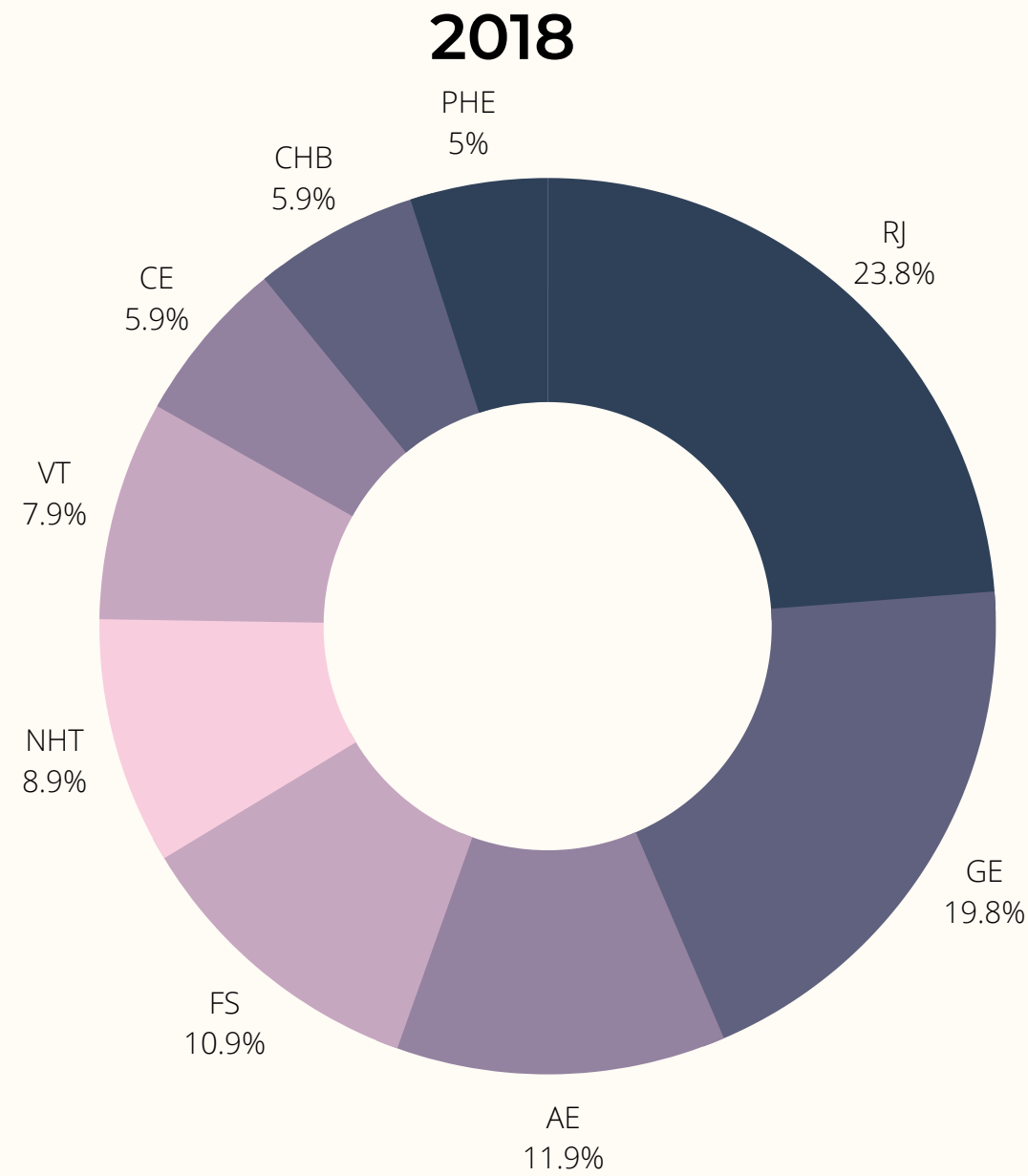
TOP PRIZM SEGMENTS OF BC TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020

Category	Country & Western	Suburban Sports	Scenic Retirement	Backcountry Boomers	Boomer Bliss
Household Count	<ul style="list-style-type: none"> Rank 3rd by Household Count 87,601 households, or 4.4% of the total Households in BC 	<ul style="list-style-type: none"> Rank 1st by Household Count 123,442 households, or 6.1% of the total Households in BC 	<ul style="list-style-type: none"> Rank 2nd by Household Count 94,025 households, or 4.7% of the total Households in BC 	<ul style="list-style-type: none"> Rank 15th by Household Count 54,847 households, or 2.7% of the total Households in BC 	<ul style="list-style-type: none"> Rank 13th by Household Count 59,001 Households or 2.9% of the total Households in BC
Maintainer Age	57	52	64	63	62
% of Children at Home	48% of couples have children living at home	47% of couples have children living at home	39% of couples have children living at home	37% of couples have children living at home	46% of couples have children living at home
Household Income	Below Household Income of \$91,291 compared to BC at \$106,681	Above Average Household Income of \$120,592 compared to BC at \$106,681	Average Household Income of \$100,586 compared to BC at \$106,681	Below Average Household Income of \$85,977 compared to BC at \$106,681	Above Average Household Income of \$141,716 compared to BC at \$106,681
Top Social Value	Attraction to Nature	Racial Fusion	Ethical Consumerism	Attraction to Nature	Effort Toward Health
Social Media Habits	84% currently use Facebook, 33% use Instagram and 22% use Twitter	79% currently use Facebook, 36% use Instagram and 23% use Twitter	79% currently use Facebook, 30% use Instagram and 21% use Twitter	83% currently use Facebook, 30% use Instagram and 20% use Twitter	75% currently use Facebook, 32% use Instagram and 23% use Twitter

TOP EQ TYPES OF BC TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020



TOP EQ TYPES OF BC TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020

Category	Gentle Explorers	Rejuvenators	Authentic Experiencers
Household Count	<ul style="list-style-type: none"> Rank 1st by Household Count 322,371 households, or 16% of the total Households in BC 	<ul style="list-style-type: none"> Rank 3rd by Household Count 237,088 households, or 14.4% of the total Households in AB 	<ul style="list-style-type: none"> Rank 3rd by Household Count 207,086 households, or 12.6% of the total Households in AB
Maintainer Age	54	55	57
% of Children at Home	47% of couples have children living at home	54% of couples have children living at home	49% of couples have children living at home
Household Income	Below Average Household Income of \$93,549 compared to BC at \$106,681	Below Average Household Income of \$110,045 compared to AB at \$125,945	Above Average Household Income of \$211,249 compared to AB at \$125,945
Top Social Value	Racial Fusion	Attraction to Nature	Culture Sampling
Social Media Habits	80% currently use Facebook, 35% use Instagram and 23% use Twitter	80% currently use Facebook, 32% use Instagram and 22% use Twitter	76% currently use Facebook, 37% use Instagram and 30% use Twitter

TOP EQ TYPES OF BC TRAVELLERS TO THE KOOTENAY ROCKIES

CANADIAN EQ SUMMARIES

Gentle Explorers

- Middle-class families with children at home; higher rates of 4+ persons at home; below average rates of travel
- 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

Rejuvenators

- Mature singles and empty nesters; have lower levels of educational attainment and earn below average incomes
- 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

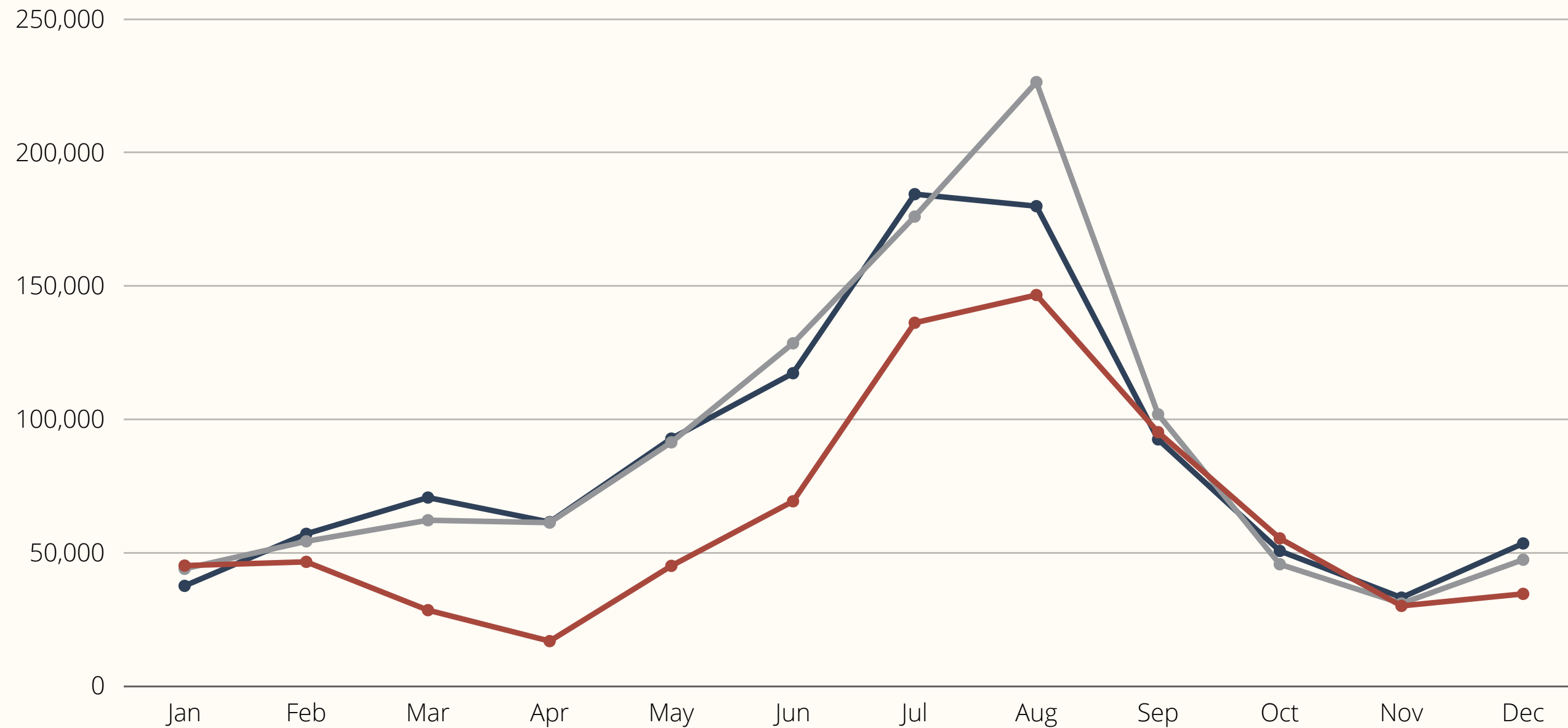
Authentic Experiencers

- Affluent, highly educated mature singles and couples with older children; living in urban and suburban neighbourhoods
- 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
- Tend to be older, highly educated and adventurous
- Relish experiencing all their travel destination has to offer in a reserved and non-exorbitant way
- 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

ALBERTA INSIGHTS

ALBERTA VISITATION

ALBERTA VISITORS TRAVELLING TO THE KOOTENAY ROCKIES BY MONTH



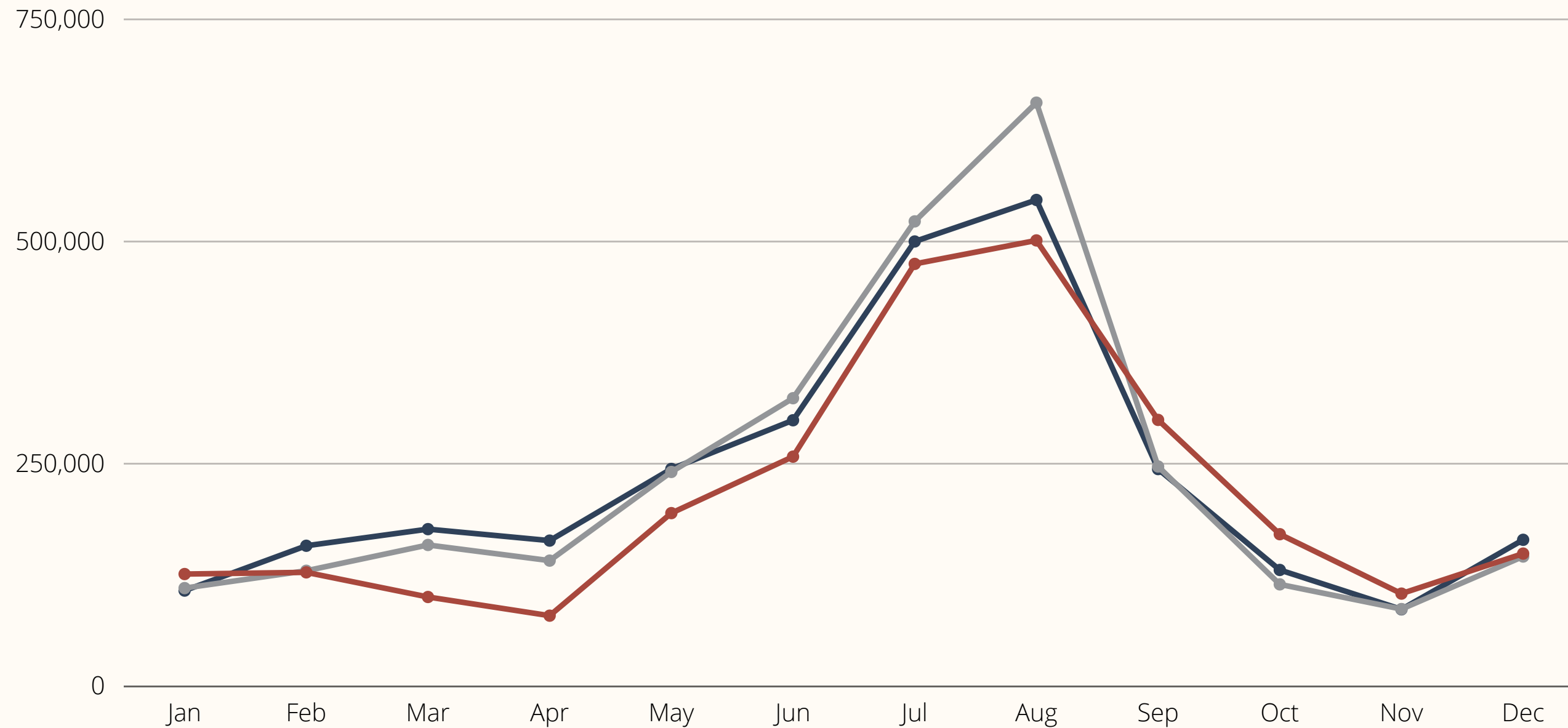
KEY FINDINGS

- April 2020 saw the lowest number of Alberta travellers visiting the Kootenay Rockies Region. Decreasing by **72%** when compared to April 2018 and **72%** when compared to April 2019.
- August 2020 saw the highest number of Alberta travellers visiting the Kootenay Rockies Region.
- While visitation to the Kootenay Rockies Region from Alberta Travellers is significantly down when compared to 2018 and 2019, an upward trend in visitors is apparent May-August 2020.

Note: Alberta declared a provincial state of emergency on **Tuesday, March 17, 2020** as a result of the COVID-19 Global Pandemic.

ALBERTA VISITATION

ALBERTA TRIPS TO THE KOOTENAY ROCKIES BY MONTH



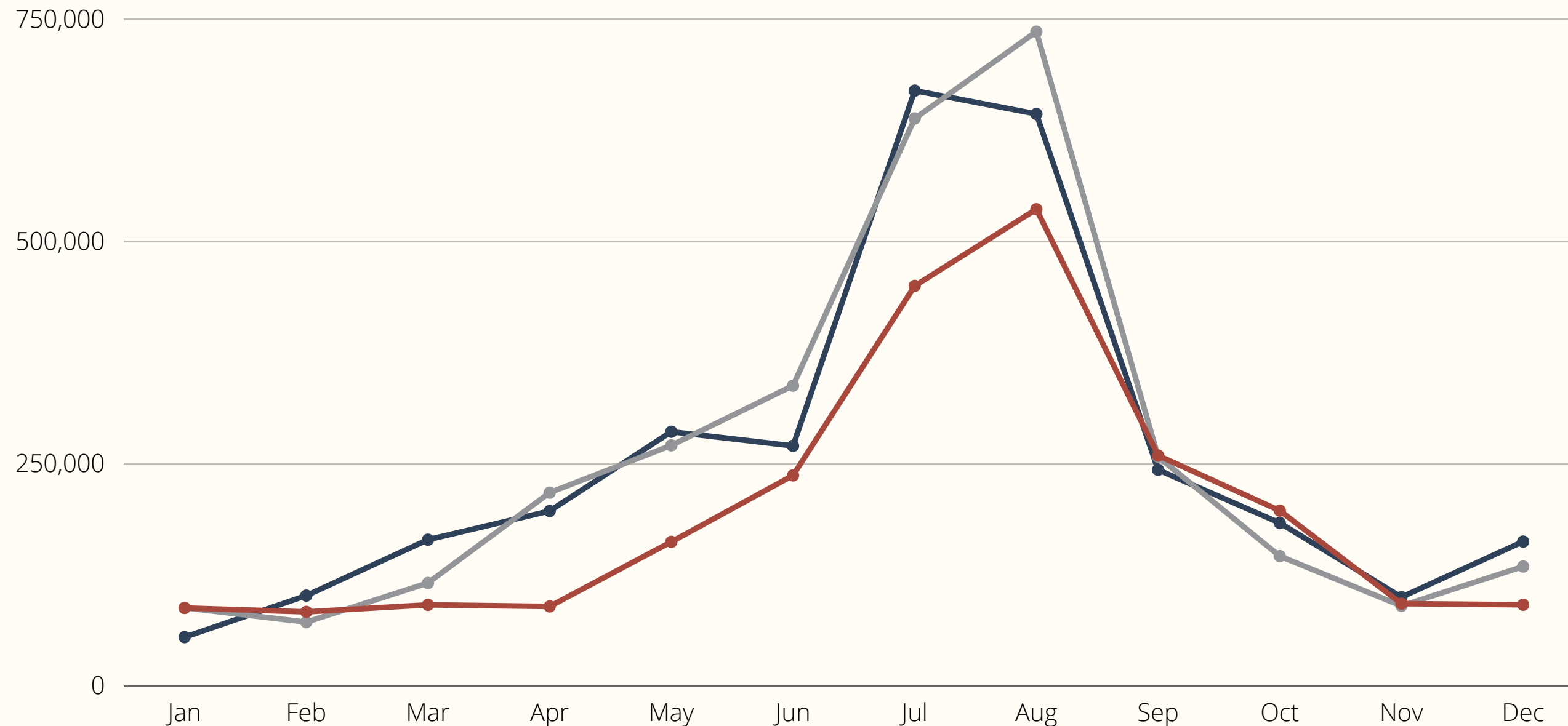
KEY FINDINGS

- April 2020 saw the lowest number of Alberta Trips to the Kootenay Rockies Region. Decreasing by **67%** when compared to April 2018 and **66%** when compared to April 2019.
- August 2020 saw the highest number of Alberta Trips to the Kootenay Rockies Region.
- While trips to the Kootenay Rockies Region from Alberta Travellers are significantly down compared to 2018 and 2019, an upward trend in number of trips is apparent May-August 2020.

Note: Alberta declared a provincial state of emergency on Tuesday, March 17, 2020 as a result of the COVID-19 Global Pandemic.

ALBERTA VISITATION

ALBERTA OVERNIGHT STAYS IN THE KOOTENAY ROCKIES BY MONTH



KEY FINDINGS

- April 2020 saw the lowest number of Alberta travellers staying overnight in the Kootenay Rockies Region. Decreasing by **52%** when compared to April 2018 and **44%** when compared to April 2019.
- August 2020 saw the highest number of Alberta Travellers staying overnight in the Kootenay Rockies Region.
- While Overnight Stays in the Kootenay Rockies Region from Alberta Travellers is significantly down compared to 2018 and 2019, an upward trend in Overnight Stays is apparent May-August 2020.

Note: Alberta declared a provincial state of emergency on **Tuesday, March 17, 2020** as a result of the COVID-19 Global Pandemic.

ORIGIN OF ALBERTA TRAVELLERS

TOP ORIGIN CITIES OF THOSE TRAVELLING TO THE KOOTENAY ROCKIES FROM BC BY YEAR

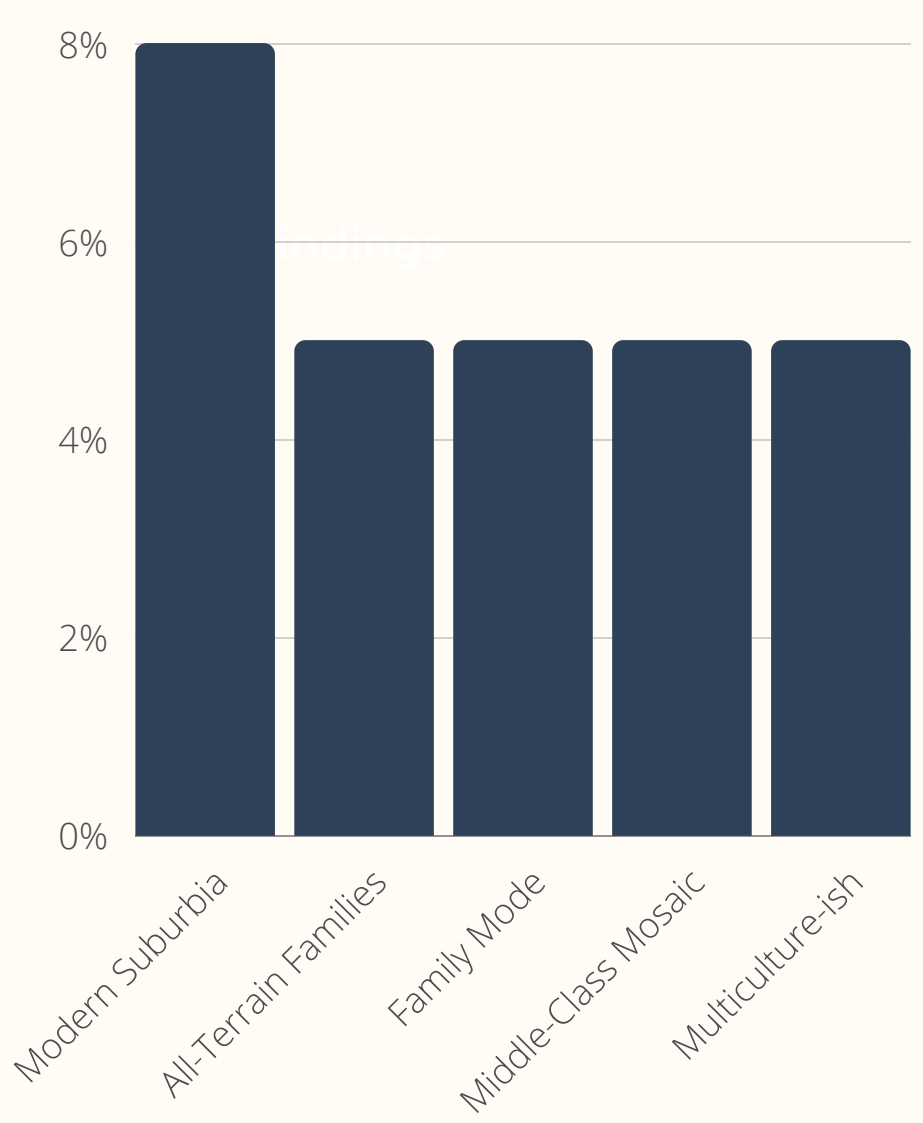
City	2018 Visitor Count	City	2019 Visitor Count	City	2020 Visitor Count
Calgary	281,200	Calgary	284,000	Calgary	210,000
Edmonton	81,400	Edmonton	87,100	Edmonton	60,200
Lethbridge	18,500	Airdrie	19,200	Airdrie	15,500
Airdrie	16,600	Lethbridge	18,200	Lethbridge	13,600
Red Deer	15,600	Red Deer	17,700	Red Deer	10,500
Strathcona County	12,600	Strathcona County	13,000	Rocky View County	8,500
Rocky View County	11,700	Rocky View County	11,300	Strathcona County	7,700
St. Albert	8,300	St. Albert	8,200	Okotoks	6,900
Okotoks	7,700	Okotoks	8,100	Cochrane	6,200
Medicine Hat	7,600	Cochrane	7,800	Canmore	5,300

TOP PRIZM SEGMENTS OF ALBERTA TRAVELLERS TO THE KOOTENAY ROCKIES 2018, 2019 AND 2020

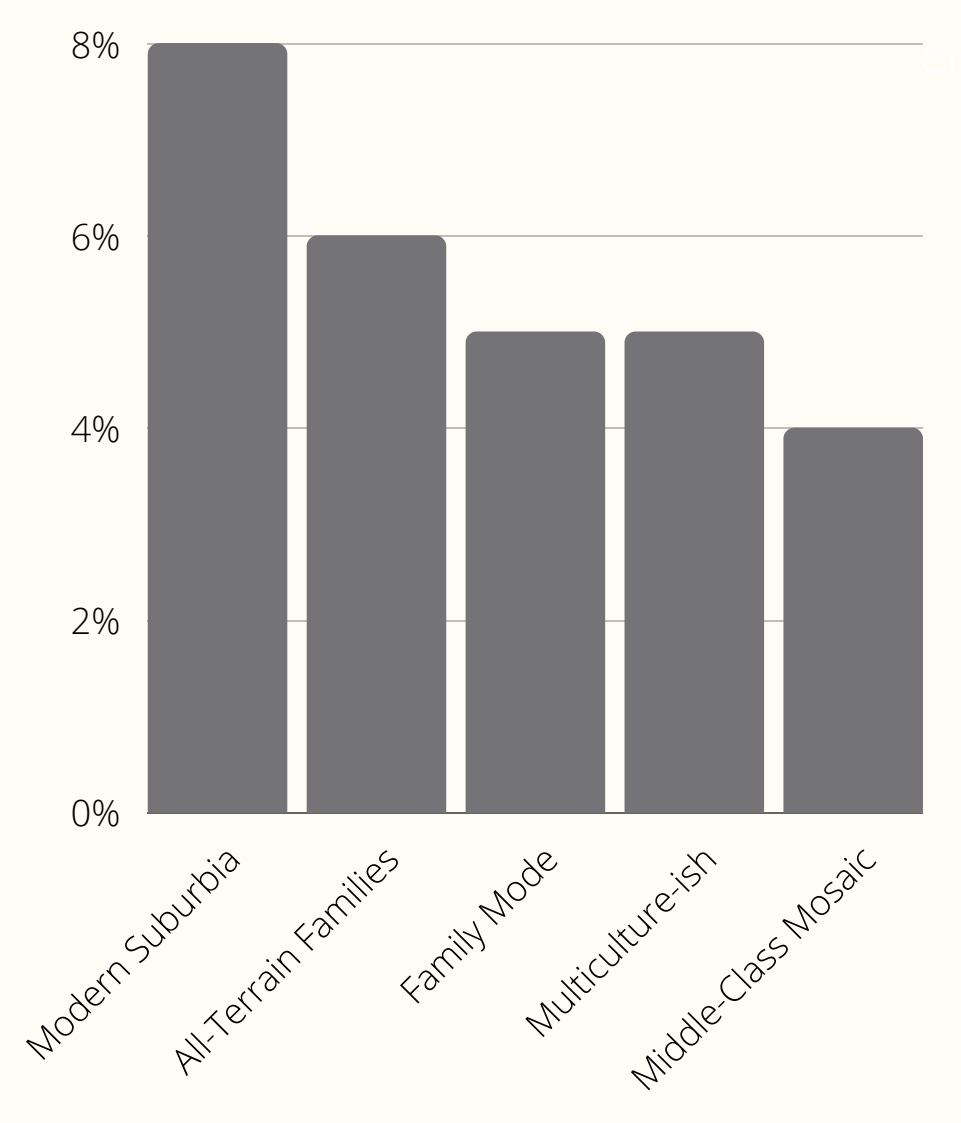
2015 - Postal Codes

2016 - Postal Codes

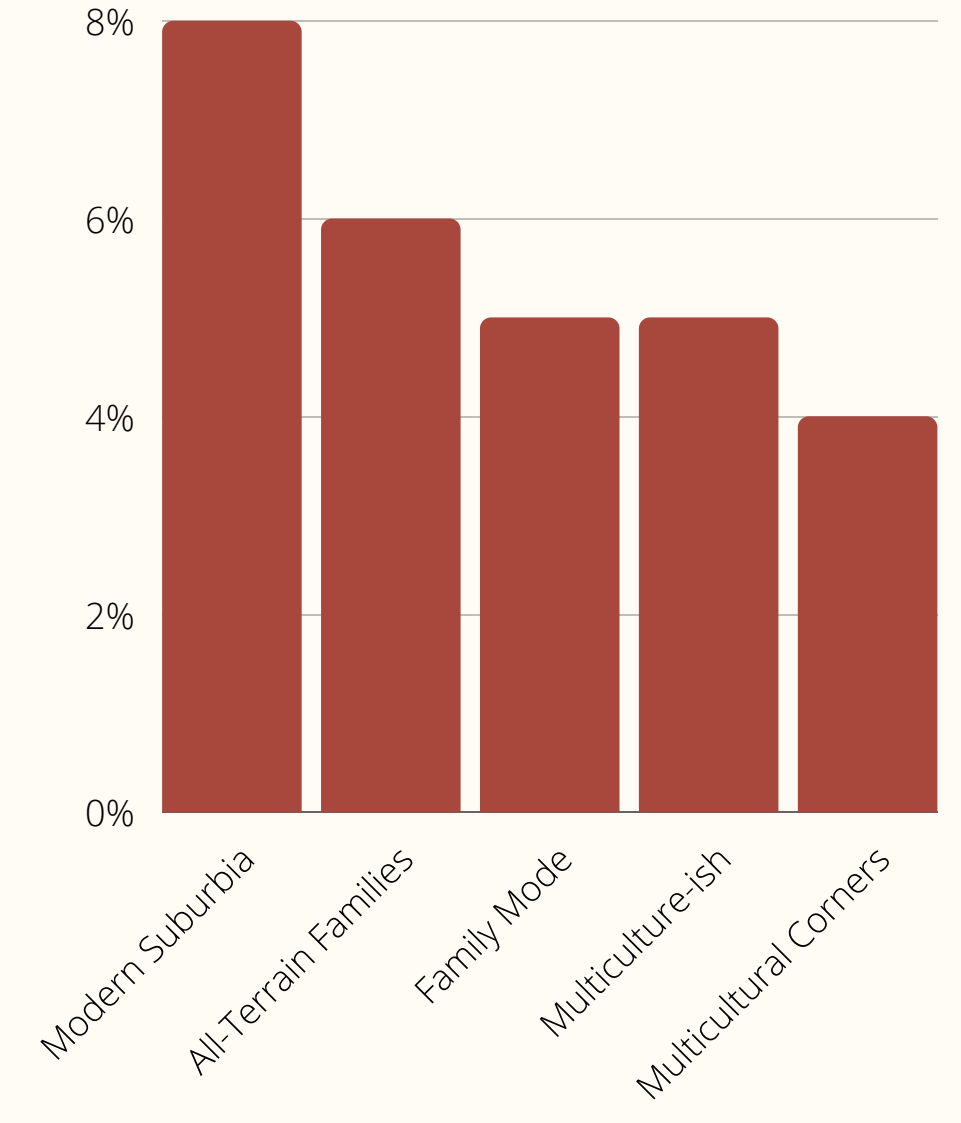
% of Total



2018



2019



2020



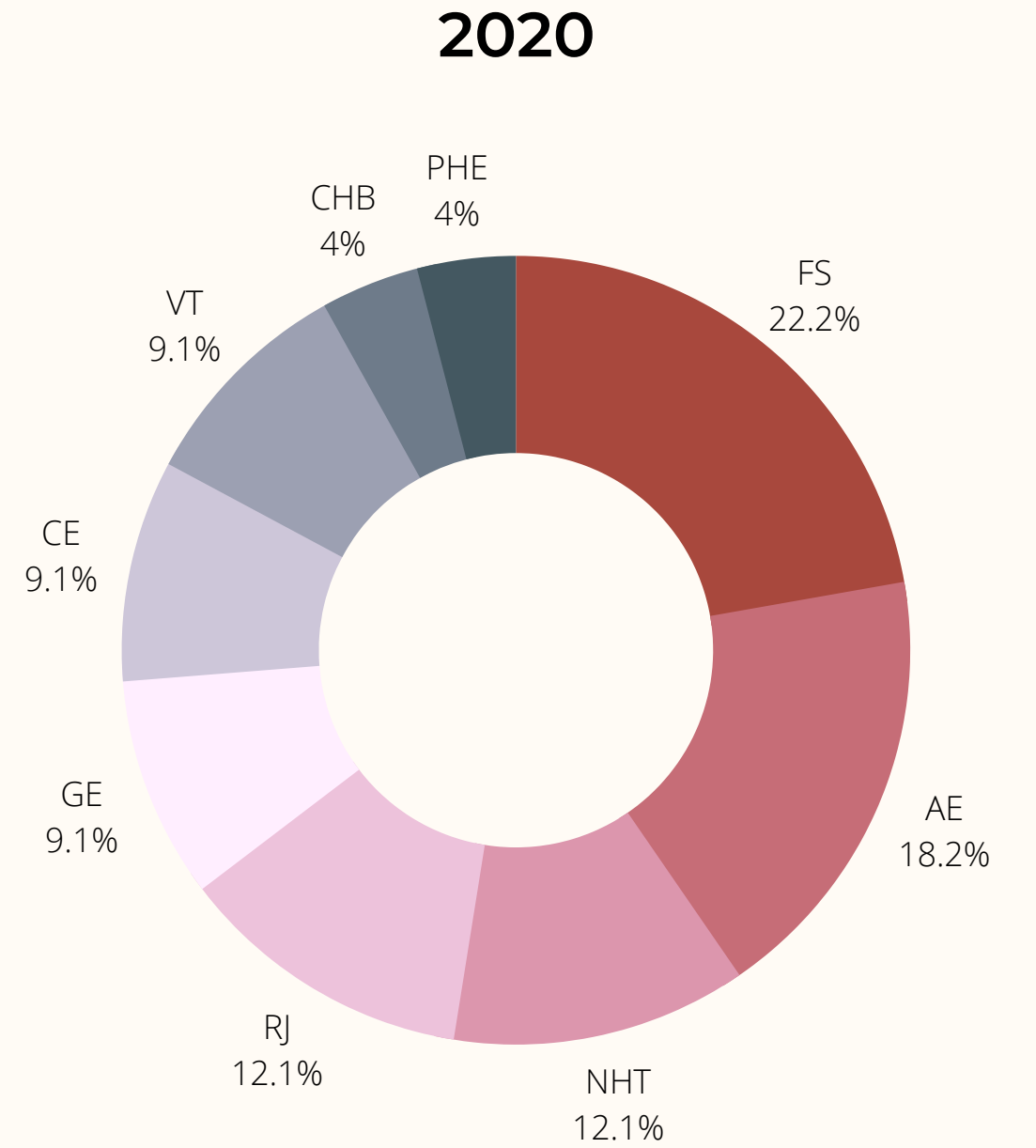
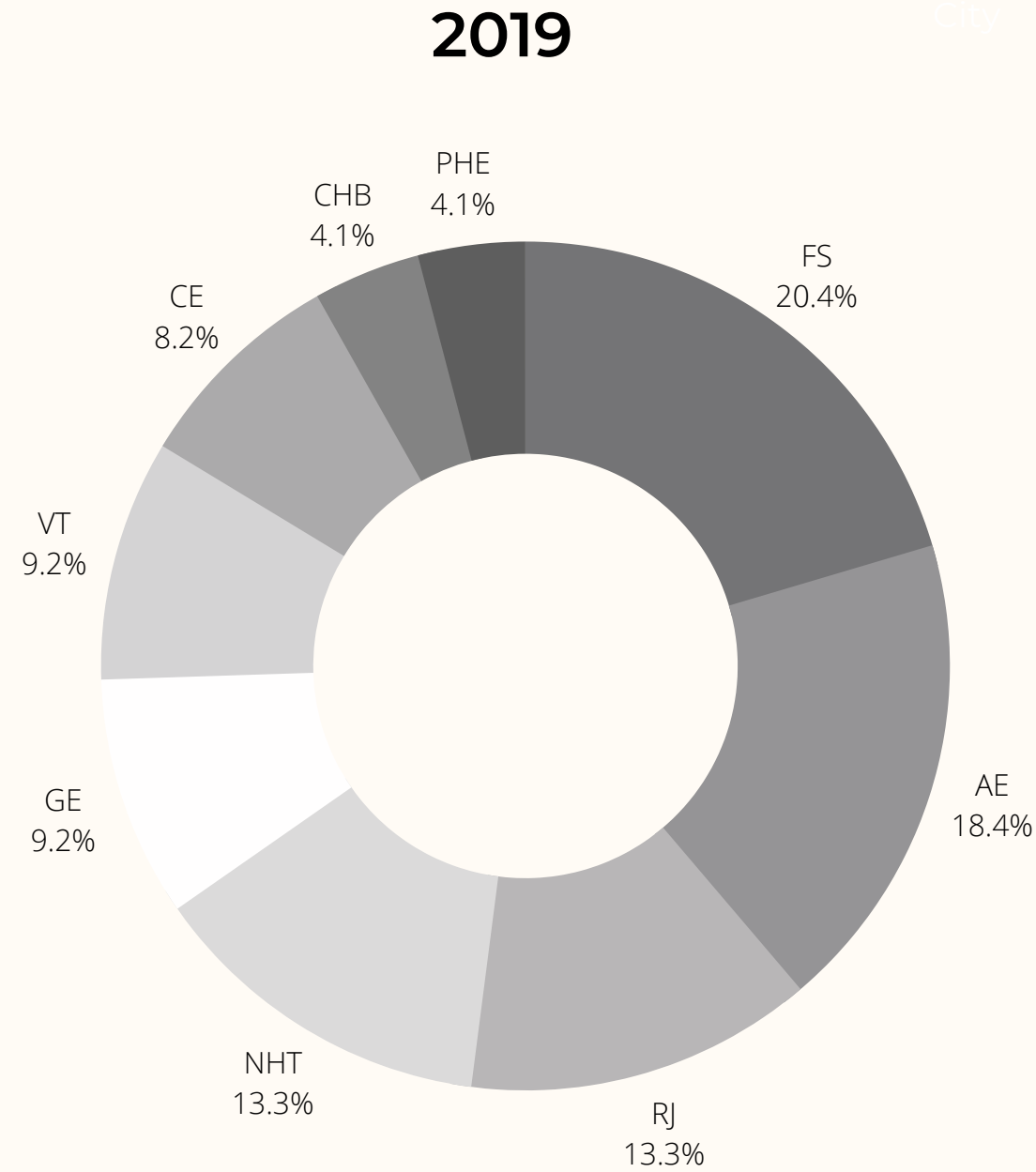
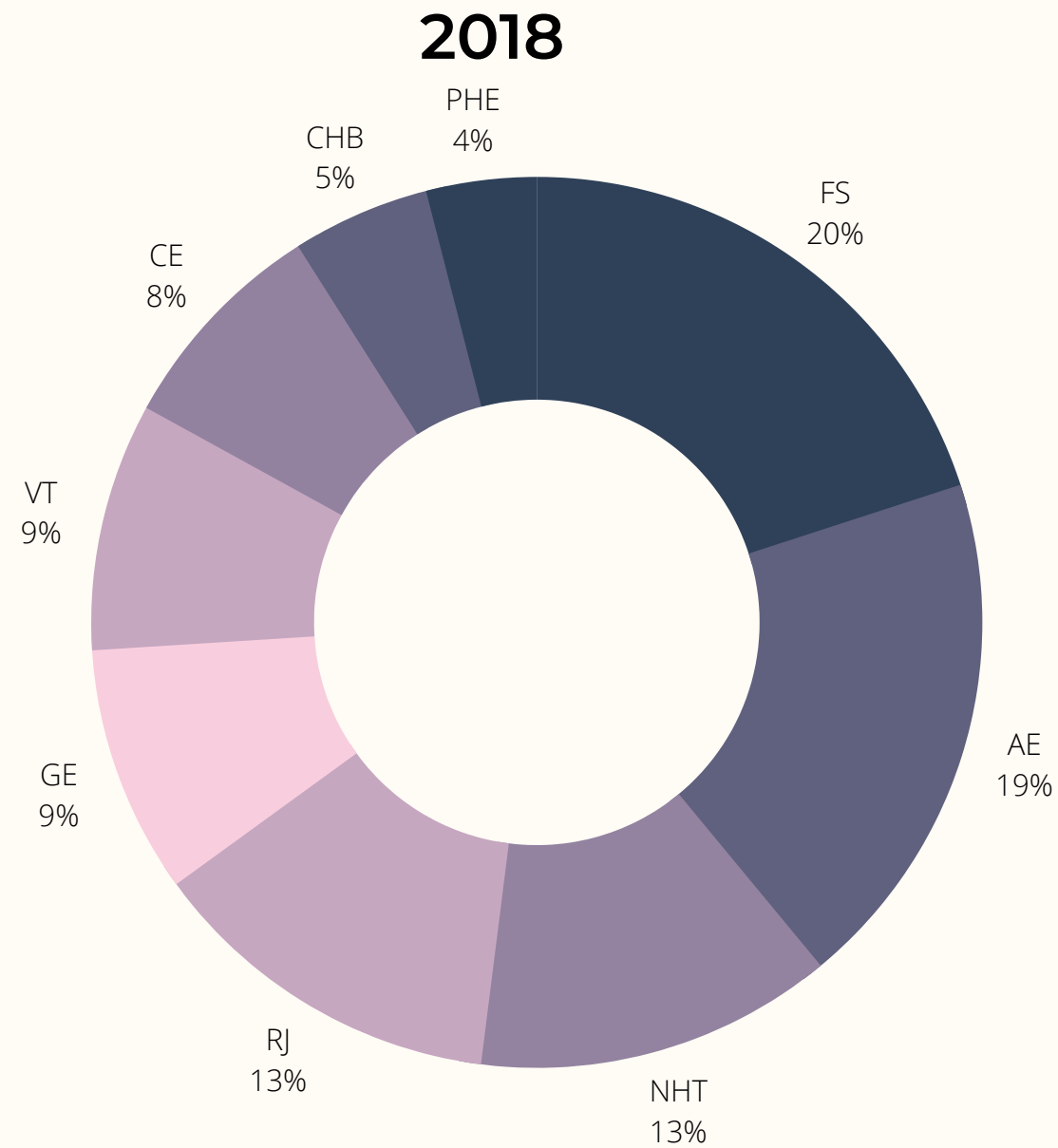
TOP PRIZM SEGMENTS OF ALBERTA TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020

Category	Modern Suburbia	All-Terrain Families	Family Mode	Middle-Class Mosaic	Multiculture-ish
Household Count	<ul style="list-style-type: none"> Rank 1st by Household Count 123,489 households, or 7.5% of the total Households in AB 	<ul style="list-style-type: none"> Rank 3rd by Household Count 85,544 households, or 5.2% of the total Households in AB 	<ul style="list-style-type: none"> Rank 7th by Household Count 64,272 households, or 3.9% of the total Households in AB 	<ul style="list-style-type: none"> Rank 4th by Household Count 81,980 households, or 5% of the total Households in AB 	<ul style="list-style-type: none"> Rank 13th by Household Count 46,523 households, or 2.8% of the total Households in AB
Maintainer Age	41	42	48	52	48
% of Children at Home	58% of couples have children living at home	53% of couples have children living at home	54% of couples have children living at home	47% of couples have children living at home	65% of couples have children living at home
Household Income	Above Average Household Income of \$141,199 compared to AB at \$125,945	Above Average Household Income of \$138,853 compared to AB at \$125,945	Above Average Household Income of \$150,792 compared to AB at \$125,945	Below Average Household Income of \$97,145 compared to AB at \$125,945	Above Average Household Income of \$166,844 compared to AB at \$125,945
Top Social Value	Confidence in Advertising	Need for Escape	Need for Escape	Work Ethic	Legacy
Social Media Habits	77% currently use Facebook, 48% use Instagram and 36% use Twitter	78% currently use Facebook, 43% use Instagram and 31% use Twitter	77% currently use Facebook, 39% use Instagram and 29% use Twitter	81% currently use Facebook, 40% use Instagram and 31% use Twitter	75% currently use Facebook, 43% use Instagram and 36% use Twitter

TOP EQ TYPES OF ALBERTA TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020



TOP EQ TYPES OF ALBERTA TRAVELLERS TO THE KOOTENAY ROCKIES

2018, 2019 AND 2020

Category	Free Spirits	Authentic Experiencers	No Hassle Travellers
Household Count	<ul style="list-style-type: none"> Rank 1st by Household Count 322,609 households, or 19.6% of the total Households in AB 	<ul style="list-style-type: none"> Rank 3rd by Household Count 207,086 households, or 12.6% of the total Households in AB 	<ul style="list-style-type: none"> Rank 8th by Household Count 199,715 households, or 12.1% of the total Households in AB
Maintainer Age	46	57	51
% of Children at Home	53% of couples have children living at home	49% of couples have children living at home	48% of couples have children living at home
Household Income	Average Household Income of \$122,710 compared to AB at \$125,945	Above Average Household Income of \$211,249 compared to AB at \$125,945	Average Household Income of \$118,008 compared to AB at \$125,945
Top Social Value	Need for Escape	Culture Sampling	Need for Escape
Social Media Habits	79% currently use Facebook, 42% use Instagram and 33% use Twitter	76% currently use Facebook, 37% use Instagram and 30% use Twitter	79% currently use Facebook, 38% use Instagram and 29% use Twitter

TOP EQ TYPES OF ALBERTA TRAVELLERS TO THE KOOTENAY ROCKIES

CANADIAN EQ SUMMARIES

Free Spirits

- Ethnically diverse, well educated families that earn moderate incomes; living in urban and suburban areas
- 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
- 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
- Enjoy the best they can afford in terms of accommodations and restaurants

Authentic Experiencers

- Affluent, highly educated mature singles and couples with older children; living in urban and suburban neighbourhoods
- 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
- Tend to be older, highly educated and adventurous
- Relish experiencing all their travel destination has to offer in a reserved and non-exorbitant way
- 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

No Hassle Travellers

- Mature singles and couples, without children at home, who are in or nearing retirement
- 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
- Average Canadians/Americans leading busy lives, understated and cautious with spending money
- Favour nature and worry-free vacations, but also enjoy the cultural highlights of their destinations
- Prefer quiet weekend getaways close to home

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