UNWTO NETWORK OF SUSTAINABLE TOURISM OBSERVATORIES

2019 GLOBAL INSTO MEETING

THOMPSON OKANAGAN

SUSTAINABLE TOURISM OBSERVATORY

GLENN MANDZIUK

President & CEO,
Thompson Okanagan Tourism Association
SUSTAINABLE TOURISM

OBSERVATORY

ISSUE AREA 1: LOCAL SATISFACTION
OBJECTIVES OF THE OBSERVATORY

1. Strengthening the delivery of responsible tourism with a focus on Biosphere, accessibility and indigenous tourism

2. Creating alignment and synergy through strengthened partnerships and further cross industry collaboration

3. Research and the utilization of big data through data collection, cross referencing, validation, analysis and interpretation

4. Crisis management through monitoring, mitigation, planning and communications

5. Strategic marketing and communications through research, education and feedback mechanisms

6. Influencing change through municipal, provincial and federal advocacy and resident awareness
RESEARCH STRUCTURE

DATA SOURCES

PRIMARY
- TELUS Insights
- Surveys
- Commissioned Research
- Biosphere Certification & Adhesion

SECONDARY
- TOTA
  Partner
  Reports & Studies

DATA GATHERING AND ANALYSIS

EDUCATIONAL INSTITUTIONS

TOTA

INTERDEPARTMENTAL COMMITTEE

OUTCOMES AND DIRECTION

ANNUAL REPORTS
OUR APPROACH TO LOCAL SATISFACTION WITH TOURISM

1. Stakeholder & Community Engagement
2. Resident Perception of Tourism
3. Tourism Sentiment Index
4. Visitor Segmentation & Volume Modelling
5. Indigenous Engagement & Collaboration
OUR APPROACH TO LOCAL SATISFACTION WITH TOURISM

1. Stakeholder & Community Engagement
2. Resident Perception of Tourism
3. Tourism Sentiment Index
4. Visitor Segmentation & Volume Modelling
5. Indigenous Engagement & Collaboration
1. STAKEHOLDER & COMMUNITY ENGAGEMENT

REGIONAL DEVELOPMENT STRATEGY

- In 2012, TOTA completed the Fully Endorsed 10-year Regional Tourism Strategy – *Embracing our Potential*
  - 18 Month Process
  - 1,800 Stakeholders Involved
  - 90 Communities + 33 First Nations Communities Engaged
  - 48 Input Sessions

- In 2019, TOTA completed an updated version of the Strategy: *Embracing our Potential 2.0*
  - Regional Roll up from 7 planning corridor strategies
  - Over 300 tourism stakeholders engaged
  - 7 working committees established
  - Presentations to City Councils
I. STAKEHOLDER & COMMUNITY ENGAGEMENT

**PRINCIPLE PARTNERS**
Leaders in sustainable and responsible tourism management and systems

**COMMITTED COMPANIES**
Tourism businesses and organizations committed to continuous improvement toward certification

**REGIONAL PARTNERS**
Organizations and DMO's committed to the communication, implementation, and promotion of sustainable tourism

**COMMUNITIES**
Communities and Organizations committed to supporting the Biosphere Sustainable Tourism efforts
1. STAKEHOLDER & COMMUNITY ENGAGEMENT

BIOSPHERE INTERDEPARTMENTAL COMMITTEE

Representation
Includes:

- City of Kelowna
- Okanagan Collaborative Conservation Project
- Ministry of Tourism, Arts, and Culture
- BC Hotel Association
- Summerhill Pyramid Winery
- Central Okanagan Regional District
- Tourism Kamloops
- Tourism Kelowna
- Women’s Resource Centre
- Agriculture Advisory Committee
- Interior Health

- Central Okanagan Economic Development Corporation
- Recreation Sites and Trails BC
- Indigenous Tourism British Columbia
- Tourism Wells Gray
- Destination British Columbia
- Okanagan College
- University of British Columbia Okanagan
- Fortis BC
- Okanagan Basin Water Board
- Sustainable Wine Growing BC
2. RESIDENT PERCEPTION OF TOURISM
REPORT ON RESIDENT SATISFACTION

Destination British Columbia in partnership with TOTA contracted an independent research group to conduct an annual online survey with residents.

The key objectives of the Resident Perceptions survey are to:

- Identify how tourism compares to other major industries; perception of new jobs and local economic activity;
- Determine how important the tourism industry is perceived to be to the economic well-being of local communities;
- Understand the perception of the economic, social/cultural, and environmental impacts tourism plays in the region; and,
- Explore residents’ perceptions of the tourism industry by tourism region, age, and length of time living in the region.
2. RESIDENT PERCEPTION OF TOURISM

METHODOLOGY

Interviews were completed by residents using an online panel. Final data was weighted by forward sortation area (FSA) regions to reflect proportions to ensure representativeness.

Survey Administration and Response
The online survey, designed by Destination British Columbia, was fielded between December 7 and 19, 2018.

<table>
<thead>
<tr>
<th></th>
<th>Weighted Interviews</th>
<th>Unweighted Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>1,504</td>
<td>1,504</td>
</tr>
<tr>
<td>Thompson Okanagan</td>
<td>263</td>
<td>361</td>
</tr>
<tr>
<td></td>
<td>17%</td>
<td>24%</td>
</tr>
</tbody>
</table>
2. RESIDENT PERCEPTION OF TOURISM

SAMPLE QUESTIONS

• How important is the tourism industry to the economic well-being of the region?

• Which industry is the largest contributor to the Thompson Okanagan economy today?

• What is the perception of the economic impact of tourism?

• What is the perception of the social/cultural impact of tourism?

• What is the perception of the environmental impact of tourism?

• What perceptions do residents have of the overall benefit of tourists?

• What perceptions do residents have of the volume of tourists in their community?
2. Resident Perception of Tourism

Perception of Tourism Industry Importance

### Importance of the Tourism Industry: British Columbia

<table>
<thead>
<tr>
<th>TOTAL IMPORTANT (Very important + Somewhat important)</th>
<th>TOTAL (n=1,504)</th>
<th>Thompson Okanagan (n=361)</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Columbia</td>
<td>95%</td>
<td>98%</td>
</tr>
</tbody>
</table>

### Importance of the Tourism Industry: Thompson Okanagan

<table>
<thead>
<tr>
<th>TOTAL IMPORTANT (Very important + Somewhat important)</th>
<th>TOTAL (n=1,481)</th>
<th>Thompson Okanagan (n=361)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Community</td>
<td>88%</td>
<td>95%</td>
</tr>
</tbody>
</table>
2. RESIDENT PERCEPTION OF TOURISM

Perceived Volume of Tourists

<table>
<thead>
<tr>
<th>Season</th>
<th>Too Many</th>
<th>Just the Right Amount</th>
<th>Too Few</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring (Mar-May)</td>
<td>7%</td>
<td>67%</td>
<td>26%</td>
</tr>
<tr>
<td>Summer (Jun-Aug)</td>
<td>34%</td>
<td>56%</td>
<td>11%</td>
</tr>
<tr>
<td>Fall (Sep-Nov)</td>
<td>6%</td>
<td>66%</td>
<td>28%</td>
</tr>
<tr>
<td>Winter (Dec-Feb)</td>
<td>4%</td>
<td>55%</td>
<td>41%</td>
</tr>
</tbody>
</table>
2. RESIDENT PERCEPTION OF TOURISM

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree (Strongly/Somewhat)</th>
<th>Neutral</th>
<th>Disagree (Strongly/Somewhat)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I want tourists to come to my community and have an enjoyable experience.</td>
<td>87%</td>
<td>11%</td>
<td>2%</td>
</tr>
<tr>
<td>I appreciate tourists for the contribution they make to the local economy.</td>
<td>83%</td>
<td>14%</td>
<td>3%</td>
</tr>
<tr>
<td>I feel positive about my encounters with tourists in my community.</td>
<td>78%</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>I take pride in making tourists feel welcome in my community.</td>
<td>77%</td>
<td>19%</td>
<td>4%</td>
</tr>
</tbody>
</table>
3. TOURISM SENTIMENT INDEX

TOTA contracts an independent research group to conduct a comprehensive analysis of what people are saying about our destination online. Insights from this data help guide our strategic planning, marketing and destination development, enabling us better opportunities to influence the way people talk about the Thompson Okanagan region.

- **Destination promoter**: Those actively recommending or speaking positively about your destination to others.
- **Destination passive**: Those speaking about your destination from an indifferent point of view.
- **Destination detractor**: Those actively discouraging or speaking negatively about your destination to others.
3. TOURISM SENTIMENT INDEX

Of all conversations online being driven by Thompson Okanagan’s tourism experience or products, 52% of those conversations have been identified as destination promoters.

\[
\frac{52 - 2}{100} = \text{Destination Promoters}
\]

\[
\text{Tourism Sentiment Score™ Result} = 50
\]
3. TOURISM SENTIMENT INDEX

TOURISM SENTIMENT DASHBOARD INDICATORS

• Destination Comparisons (How Do We Stack Up?)
  • Southern QLD Country
  • Flanders (EN)
  • Napa Valley
  • Vancouver Island
  • Niagara Region

• Which Key Tourism Assets Are Driving Online Conversations?

• Tourism Categories – A Detailed Look at 50 Tourism Assets That Comprise the Tourism Sentiment Score

• Where Is Our Destination Going From Here? (Trendline)
3. TOURISM SENTIMENT INDEX

Tourism Sentiment Score: Trendline

Comparative Median
Comparative Linear Projection
Thompson Okanagan Sentiment Timeline
Thompson Okanagan Linear Projection
4. VISITOR SEGMENTATION & VOLUME MODELLING

- Analysis of visitor patterns and market segments help us understand visitor impact and volumes
- Attracting the **right type of visitor** to the **right location** at the **right time of year**, helping to complement resident desire for **Authentic Experiencers** and **Cultural Explorers**.

**Mobile Insights Deliver Visitor Data** → **Environics Analysis including Explorer Quotient Profiling** → **Use in Marketing Initiatives to Hyper-Target Potential Visitors** → **Analyze Return on Investment by Number of People Who Saw Ads That Actually Visited Destination**
4. VISITOR SEGMENTATION & VOLUME MODELLING

Hyper target based on key visitation origin and consumer profiles research shows it varies by each district & season.

Results vary by season.

Dominant EQ types in this market:
- Free Spirits: 8%
- Cultural History Buffs: 81%

V5S
4. VISITOR SEGMENTATION & VOLUME MODELLING

CASE STUDY: ROUTE 97

PROGRAMMATIC ADVERTISING

Seattle, WA Campaign | May-Aug 2018 | Connecting America Program

**Objective:** Increase awareness of Route 97 and the Thompson Okanagan Region

1. Targeted Authentic Experiencers by physical location (ZIP Codes) – 25-54
2. Agency executed the digital campaign (Facebook, Google Adwords (Search & Display) and YouTube
3. Used Zip Codes from Environics Analytics data source
4. Agency measured impact of the campaign exposure (impressions)
5. Results: 9,705 total visits to the Thompson Okanagan Region by consumers who had viewed the campaign ads, on average visits took place 4-9 weeks after the campaign
TOTA, in partnership with the Provincial Indigenous Tourism Association, hired a Regional Specialist to build relationships with the 33 Indigenous Interior Salish Communities in the Thompson Okanagan.

Through the fundamental approach of “mouths shut, ears open,” we identified the following:

- A need for training – latest and best practices in Indigenous Tourism
- A desire to use art as the medium to share the Interior Salish Story
- An opportunity for a series of projects creating social value through cultural tourism
6. INDIGENOUS ENGAGEMENT & COLLABORATION

INTERNATIONAL INDIGENOUS TOURISM SUMMIT BID 2019

NOVEMBER 12 – 14, 2019
6. INDIGENOUS ENGAGEMENT & COLLABORATION

REVEALING OUR STORY: IArT PROJECT

INDIGENOUS ARTISAN MOBILE ENTERPRISE
6. INDIGENOUS ENGAGEMENT & COLLABORATION

1000 HANDS

- Social Engagement Initiative that has evolved into a Community Building Initiative:
  - Brought back traditional techniques that may have been lost to ultimately create a tourism product while fostering community pride.