



TELUS Insights

Analytics for the real world



City of Revelstoke

May 2018 – April 2019

Destination Marketing Executive Summary



Prepared for:
The City of Revelstoke

Prepared by:
TELUS Insights



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This study utilizes de-identified and aggregated TELUS mobile subscriber data. In order to protect the privacy of TELUS subscribers, all personal information is removed. Proprietary algorithms were developed to aggregate, calculate and extrapolate impressions to the general population of Canada. These algorithms were also used to derive demographic profiles based on Statistics Canada's 2016 Census and National Household Survey.



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Data and privacy

To protect the privacy of subscribers, several frameworks and measures are in place:

- All data is de-identified meaning it cannot be traced back to an individual.
- All data is aggregated into large data pools ensuring privacy is fully protected at all times.
- All data is extrapolated to be representative of the total Canadian population.
- All data is stored on secured TELUS assets.

This study utilizes 365 days of data passively collected by TELUS. Traffic volumes were calculated by using algorithms that calculate the distance and time between different user events as generated by the TELUS network.

Location analytics are possible using this data because specific cell towers have an associated geographic coordinate. By aggregating and de-identifying this data, it is possible to perform geographic and movement analysis, while respecting individual privacy.



Methodology

Cellular data was collected passively from the TELUS network between the months of May 2018 and April 2019. This data was then de-identified, and aggregated according to the details laid out in the Data and Privacy section. Once this data set was built, a series of algorithms were run on the data to determine important traits, such as the monthly unique count of visitors, the monthly unique count of trips by length of stay, and daily unique counts for visitors or residents of the Revelstoke Study Areas.

The goal of this study was to provide The City of Revelstoke insights for two contexts: city planning and destination marketing. To do this, TELUS Insights studied, on a monthly basis, the visitor and resident populations of two Study Areas: the Total Area and the City Area, which is within the Total Area.

In order to distinguish visitors from residents, a proprietary Assumed Home Neighbourhood algorithm is used. This algorithm takes into account many factors about the device, over a period of 45 days ending at the completion of the study period. Using this larger trailing data set, a location with a significant amount of time spent is identified and categorized as the assumed home neighbourhood.

For International visitors, the Mobile Country Code (MCC) from the device is used to identify which country the device originated from. This unique code is assigned to a country, and is based on the origin of the SIM card within the device. For this reason, some devices may be misidentified as being from a specific country, even though the owner of the device is from another country. These numbers provide a good representation of who has come from a given place, but are not necessarily capturing 100% of those visiting. For this reason, a market share that takes into consideration the number of observed versus the total number of visits from a given country is applied to the data in order for it to be representative.

Definitions

Monthly Unique Count

The total number of unique devices observed in a Study Area during a given month. This number is extrapolated to the population.

Study Month

This is the month that was studied. In the case of Monthly Unique Counts, counts would only be considered to the Study Month.

Study Area

A Study Area is a geo-fenced area. A device must have been within a Study Area to be counted.

Canadian Visitors

Canadian cellular devices with assumed home locations outside of the indicated Study Area.

International Visitors

The number of visitors with non-Canadian cellular devices.

Length of Stay

The Length of Stay is how long a visitor stayed in a Study Area for a unique trip. Lengths of stay are grouped by the amount of time spent. The groups are 8-24 hrs, 25-72 hours.

Revelstoke Study

Area Definitions

Study Area

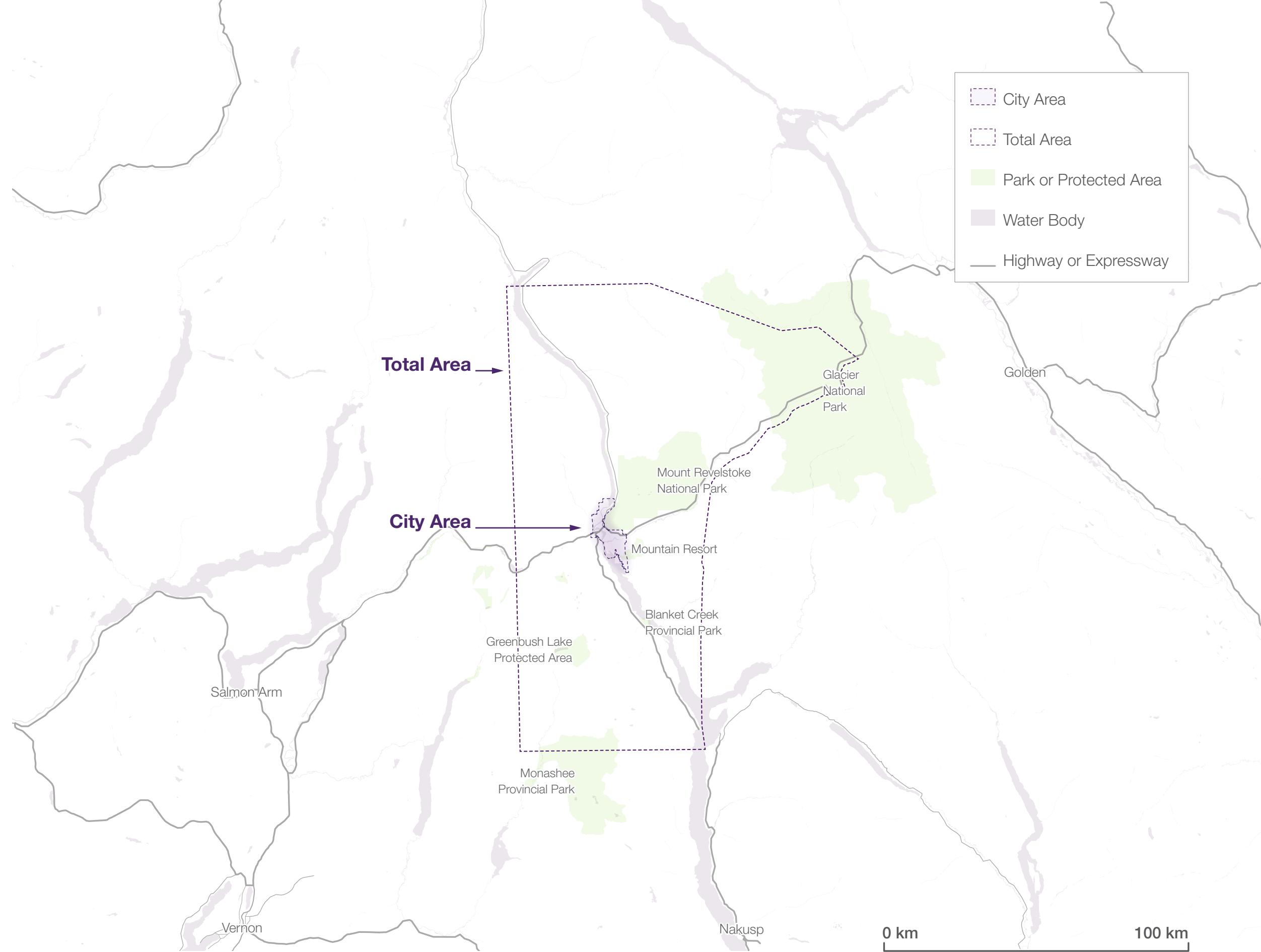
A Study Area is a geo-fenced area. A device must have been within a Study Area to be counted. There are two distinct Study Areas.

Total Area

The Total Area is the largest boundary of the study. It extends North to the top of Lake Revelstoke and South to where Highway 23 meets Upper Arrow Lake. The Area includes the entire Mount Revelstoke National Park of Canada. The Eastern edge of the Area includes the Trans Canada Highway and a portion of the Glacier National Park. The Western edge of the Area stops before the Mount Griffin Provincial Park.

City Area

The City Area boundary is based on the CSD or City boundary of Revelstoke.



Executive Summary

Beginning in May 2018, TELUS Insights has conducted a monthly analysis of the visitors in the Revelstoke Total Area. The goal of this 12 month analysis was to provide Revelstoke with qualified insights to support strategic tourism planning.

This summary addresses key questions including:

- What was the total number of unique visitors each month?
- How many visitors are in the Total Area but not visiting the City?
- How many visitors are coming from key Canadian and International markets?
- Which key markets are visiting during the spring and fall shoulder seasons?
- How do the total number of short one-night trips compare to quality multi-night trips?
- How many short one-night trips and quality multi-night night trips are being taken by visitors from key Canadian and International markets?
- What are the monthly trends in Canadian visitor demographics for millenials, zoomers, and families?

Monthly Unique Visitors

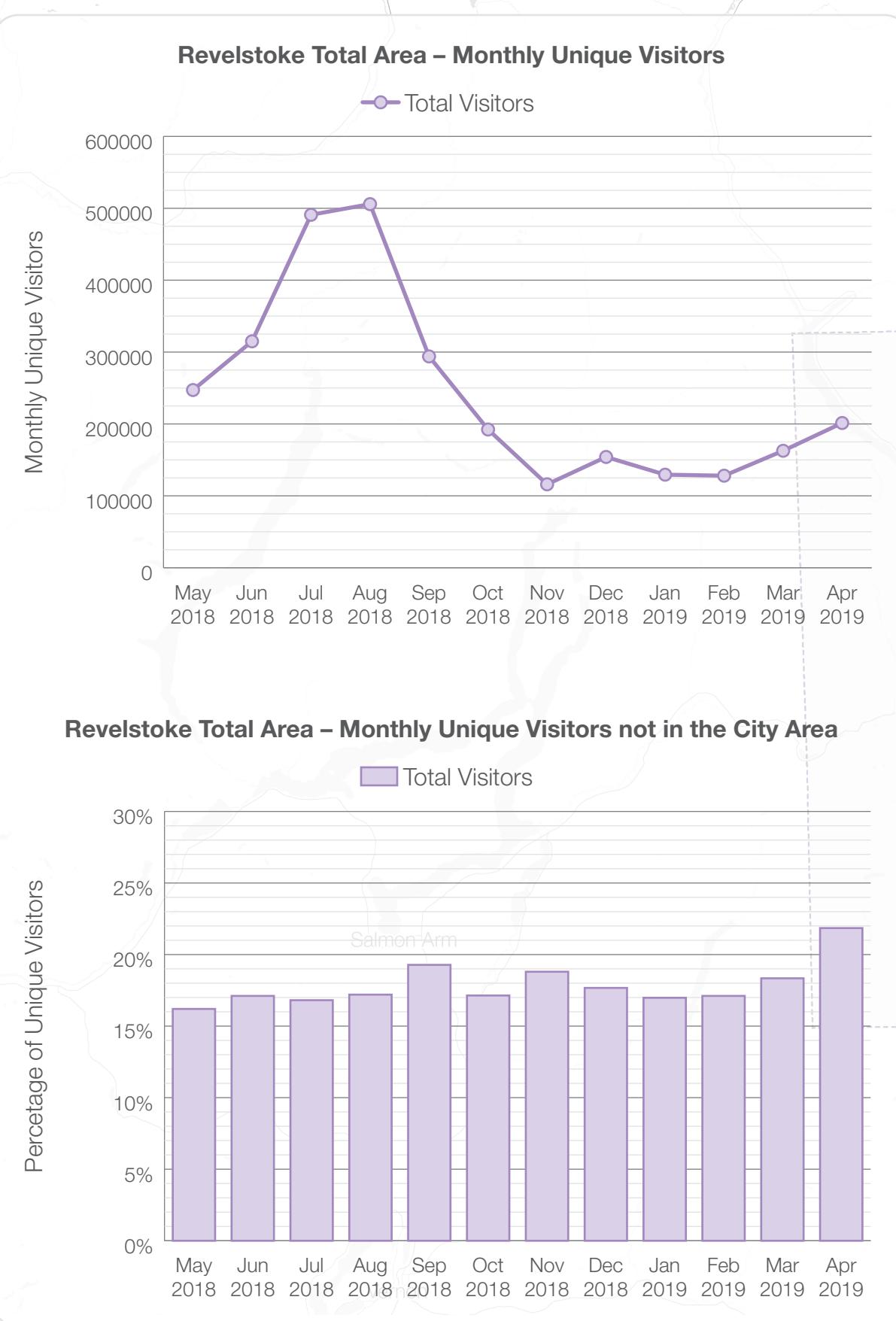
Total Visitors

May 2018 – April 2019

This line chart shows the monthly unique counts of total visitors in the Revelstoke Total Area. The column chart shows the monthly unique counts of total visitors that did not enter the Revelstoke City Area as a percentage of the total visitors in the Revelstoke Total Area, representing a missed market opportunity.

Monthly unique counts of total visitors include all Canadian and International visitors across the entire month. Canadian visitors are people with an assumed home neighbourhood in Canada but outside of the Revelstoke Total Area.

International visitors are distinguished by the mobile country code associated with the device sim card.



506K Total

506K Total unique visitors were seen during August at the height of the summer season.

154K Total

154 Total unique visitors were seen during December at the height of the winter season.

16-20%

16%-20% of total unique visitors did not enter the City Area while visiting Revelstoke per month.

19.28%

19.28% of total visitors did not enter the City Area in September.

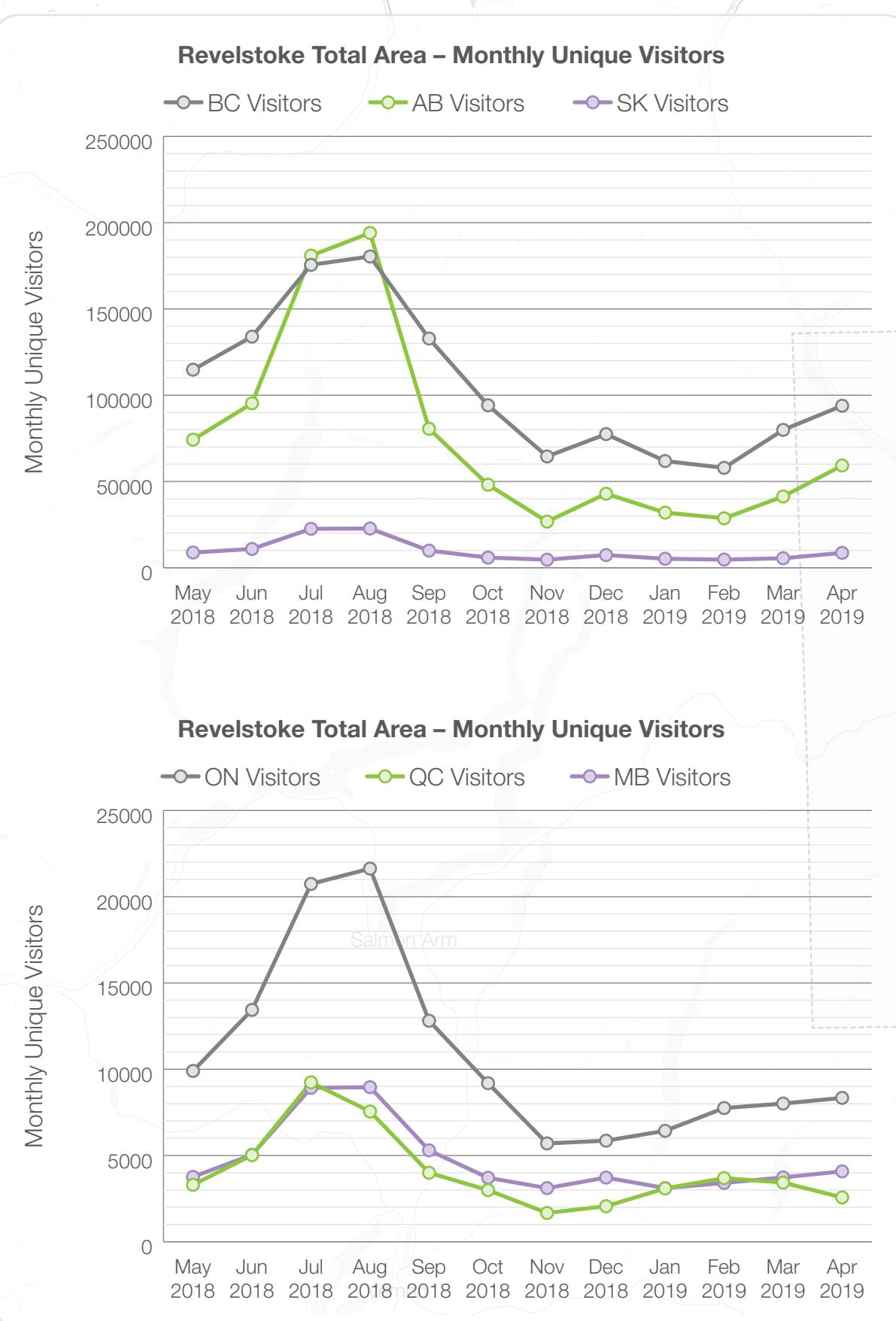
Monthly Unique Visitors

Canadian Visitors
Provincial markets

May 2018 – April 2019

These line plots show the monthly unique counts of Canadian visitors in the Revelstoke Total Area by their assumed home province. These charts include the top provincial markets of British Columbia, Alberta, Saskatchewan, Manitoba, Ontario and Quebec.

Monthly unique counts include all Canadian visitors across the entire month. Canadian visitors are distinguished as visitors with an assumed home neighbourhood in Canada but outside of the Revelstoke Total Area.



38% AB Visitors

Albertan visitors were the largest market (38%) of total unique visitors in August.

50% BC Visitors

British Columbian visitors were the largest market (50%) of total unique visitors in December.

9% ON and QC

While AB and BC markets fall at the end of the winter, ON and QC rise in February becoming 9% of the total unique visitors.

Monthly Unique Visitors

Canadian Visitors City Markets

May 2018 – April 2019

These line plots show the monthly unique counts of Canadian visitors in the Revelstoke Total Area by their assumed home city. The left column of charts shows the top city markets in British Columbia and the right column includes the top city markets of Alberta, Saskatchewan, Ontario and Quebec.

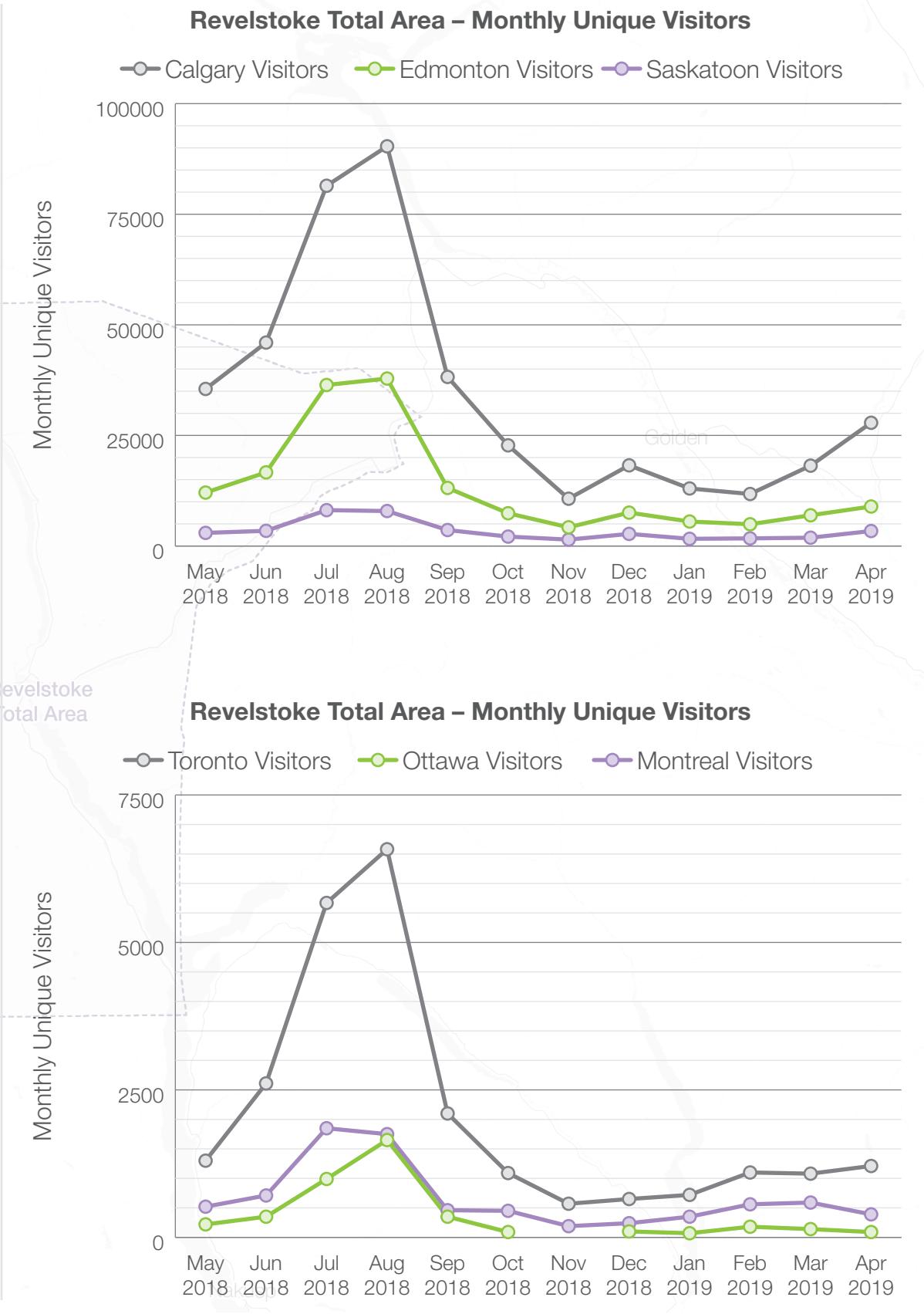
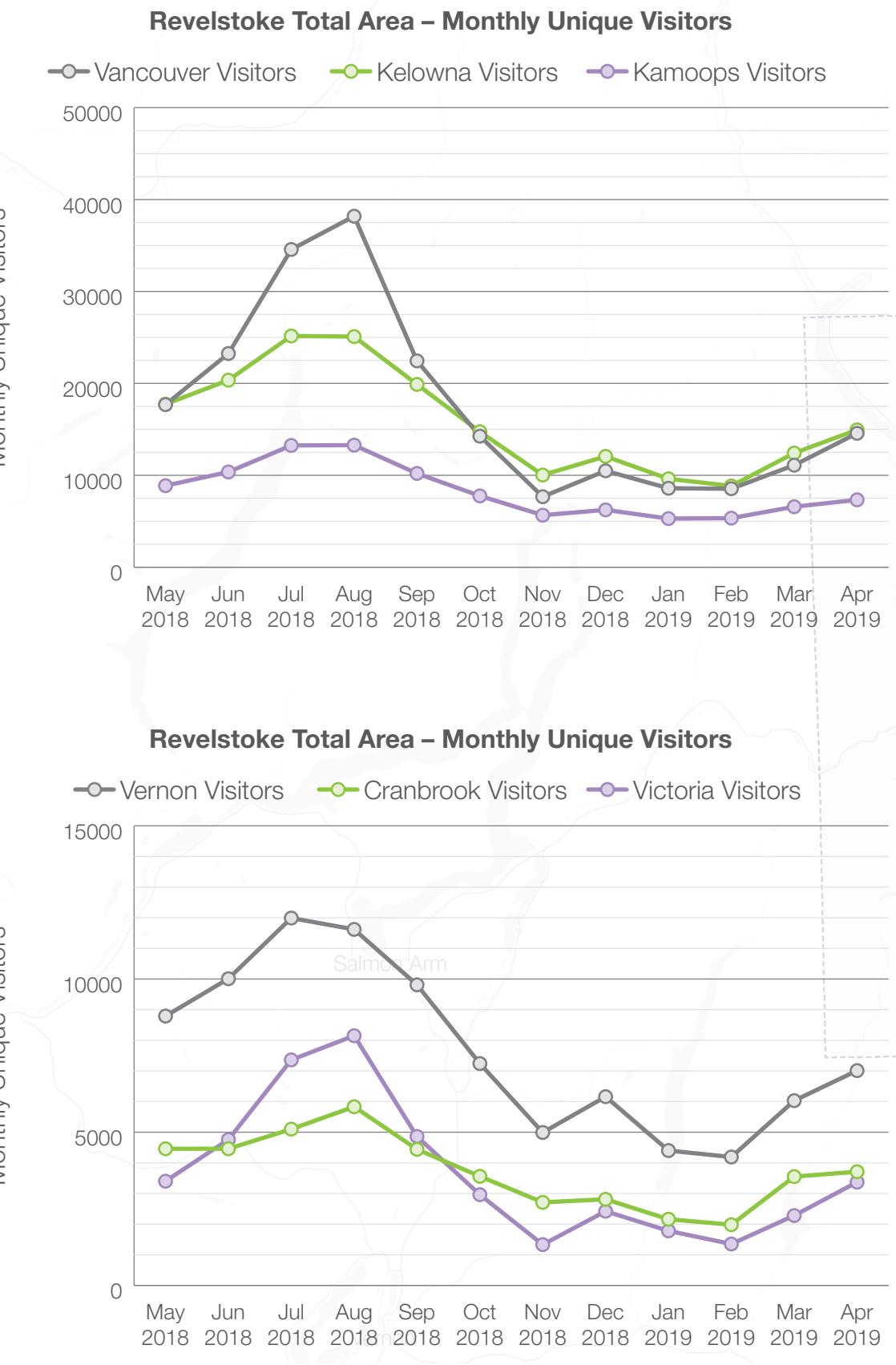
Monthly unique counts include all Canadian visitors across the entire month. Canadian visitors are distinguished as visitors with an assumed home neighbourhood in Canada but outside of the Revelstoke Total Area.

15% of August

Calgary visitors were 15% of total visitors during August

8% of November

Kelowna visitors were a large part of the fall shoulder season.



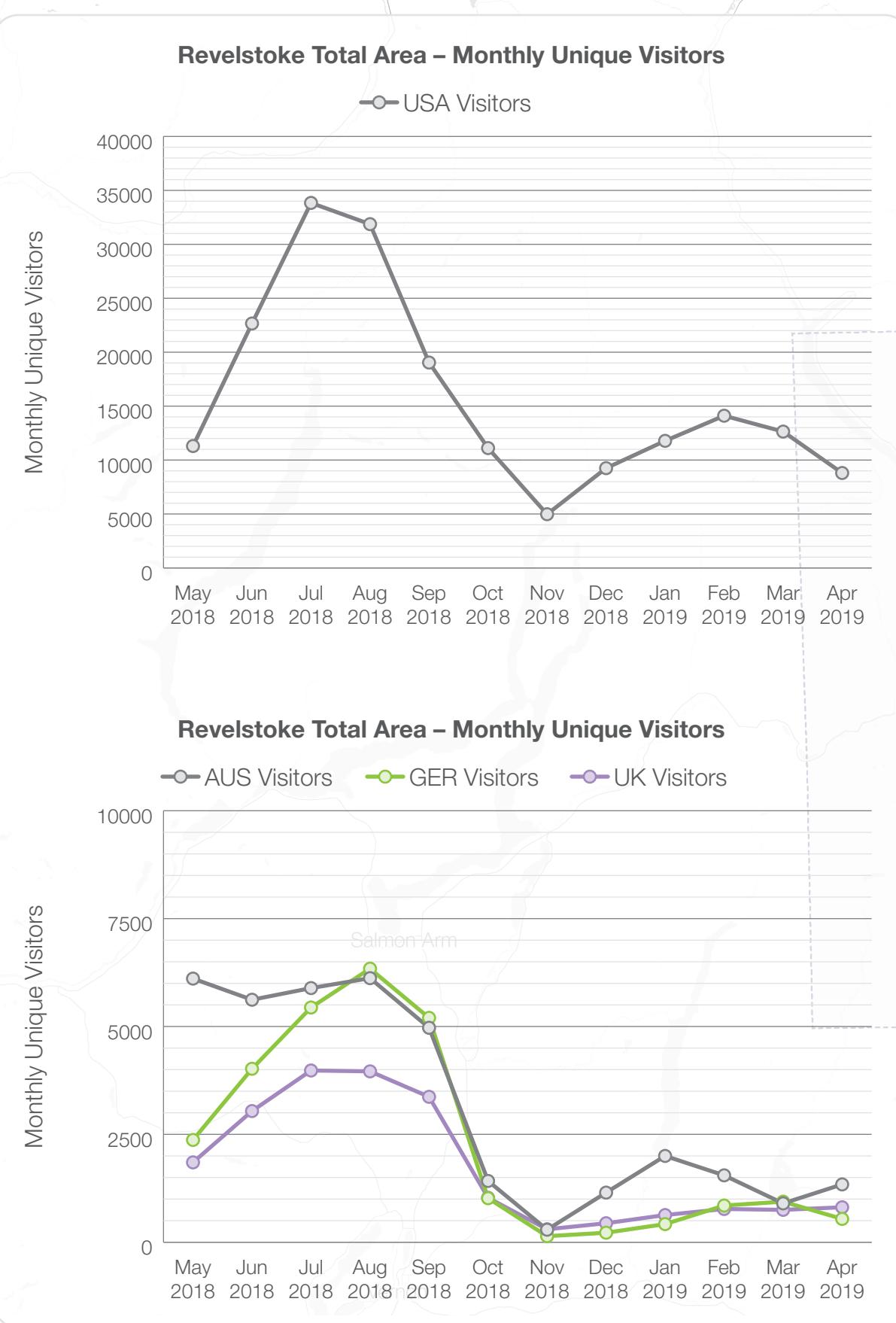
Monthly Unique Visitors

International Visitors
Country markets

May 2018 – April 2019

These line plots show the monthly unique counts of International visitors in the Revelstoke Total Area by their country of origin. These charts show the top holistic International markets including the United States of America, Australia, Germany, and the United Kingdom.

Monthly unique counts include all International visitors across the entire month. International visitors are distinguished by the mobile country code associated with the device sim card.



34K in July

During the early summer season Americans were 6.9% (34K) of total unique visitors.

14K in February

American visitors represented 11% (14K) of total unique visitors during the late ski season.

6K in May

Australian visitors were a larger percentage (2%) of total unique visitors during the spring shoulder season.

2K in January

Australian visitors were a larger percentage (1.5%) of total unique visitors during the mid-ski season.

Monthly Unique Visitors

American Visitors
State markets

May 2018 – April 2019

These line plots show the monthly unique counts of American visitors in the Revelstoke Total Area by their state of origin. These charts show the top twelve states with the most American visitors originating from them.

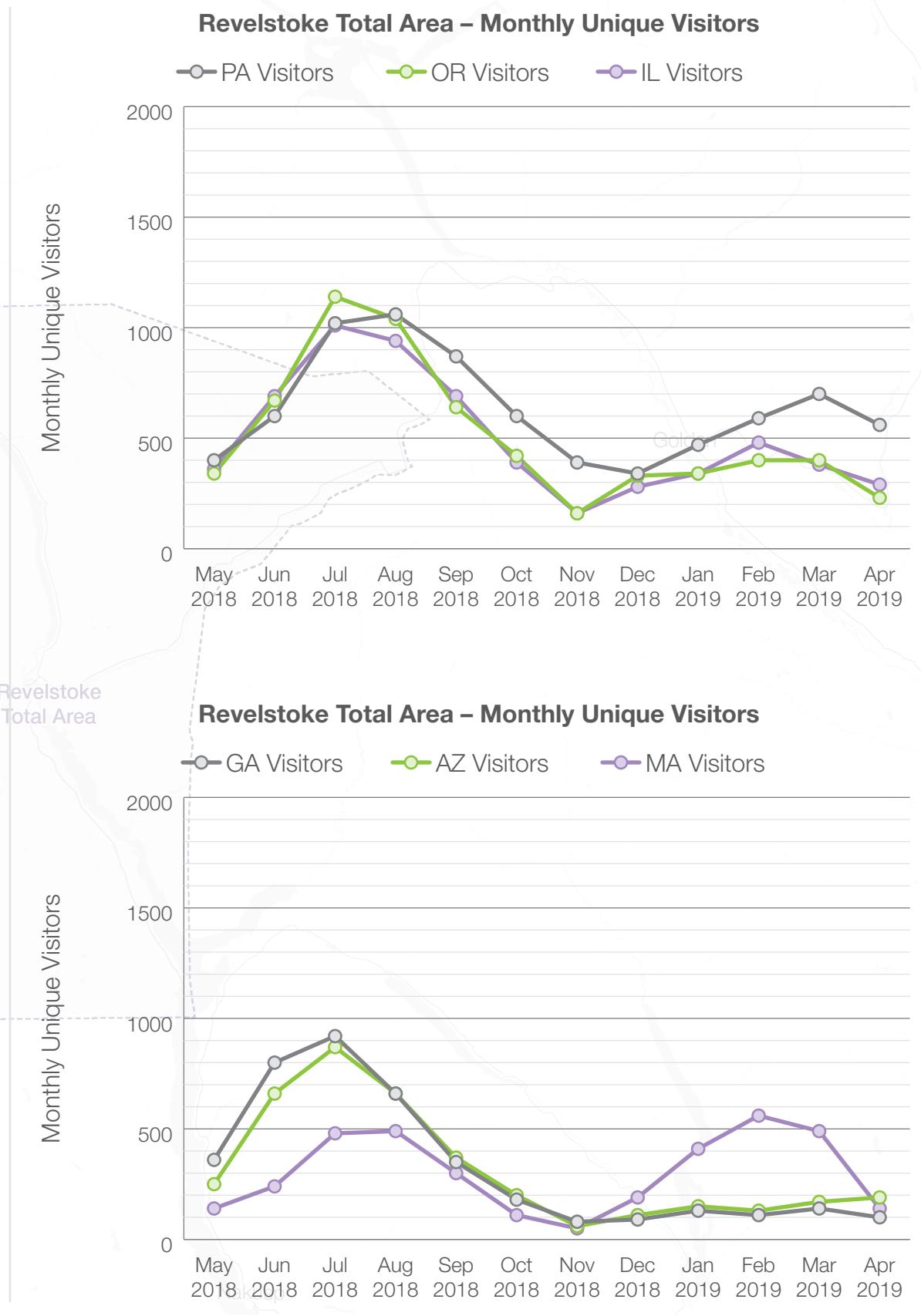
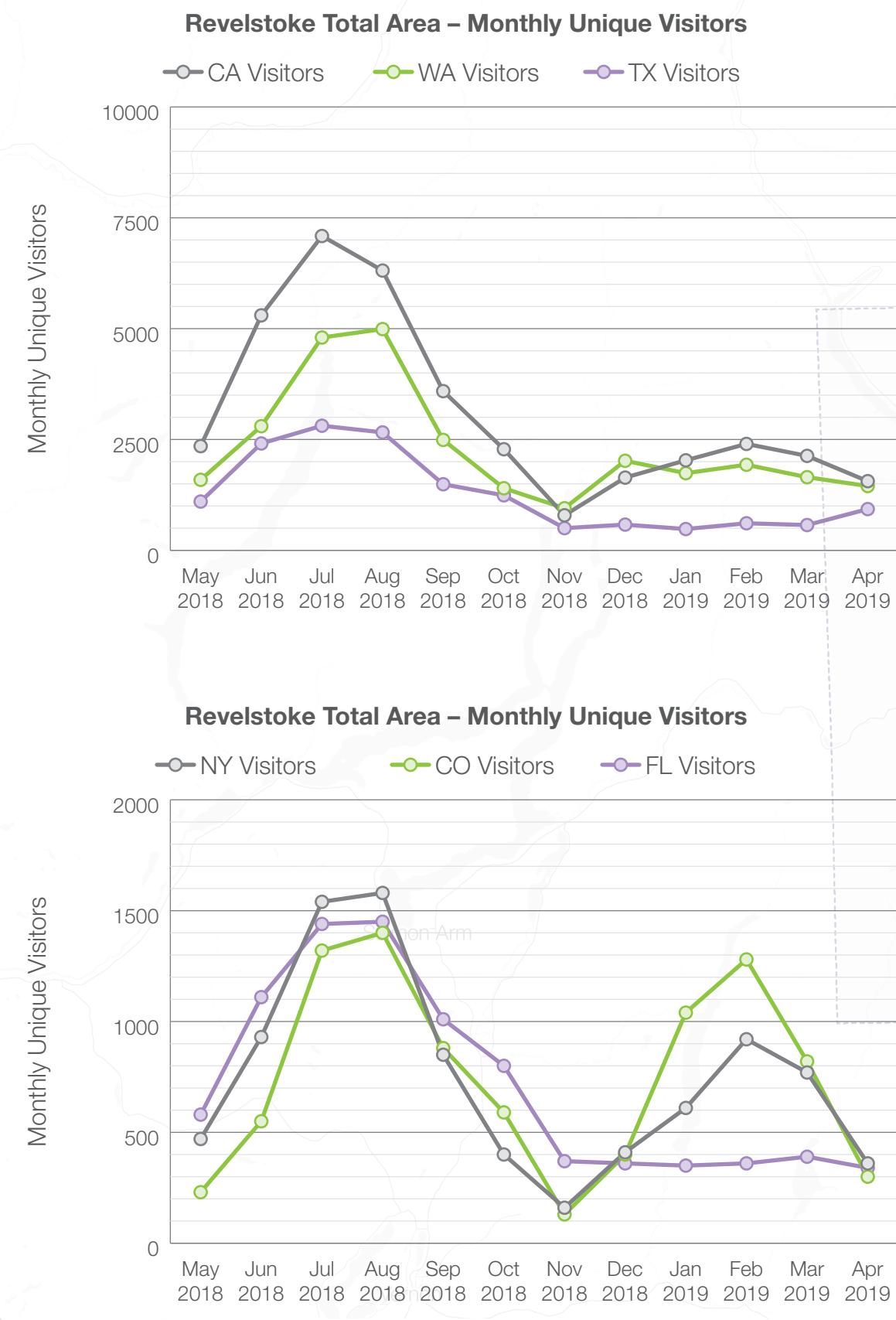
Monthly unique counts include all International visitors across the entire month. International visitors are distinguished by the mobile country code associated with the device sim card.

CA Visitors

Californian visitors were the largest USA State market during July and February.

560 MA Visitors

A higher number of Massachusetts Visitors were present in February than during the summer months.



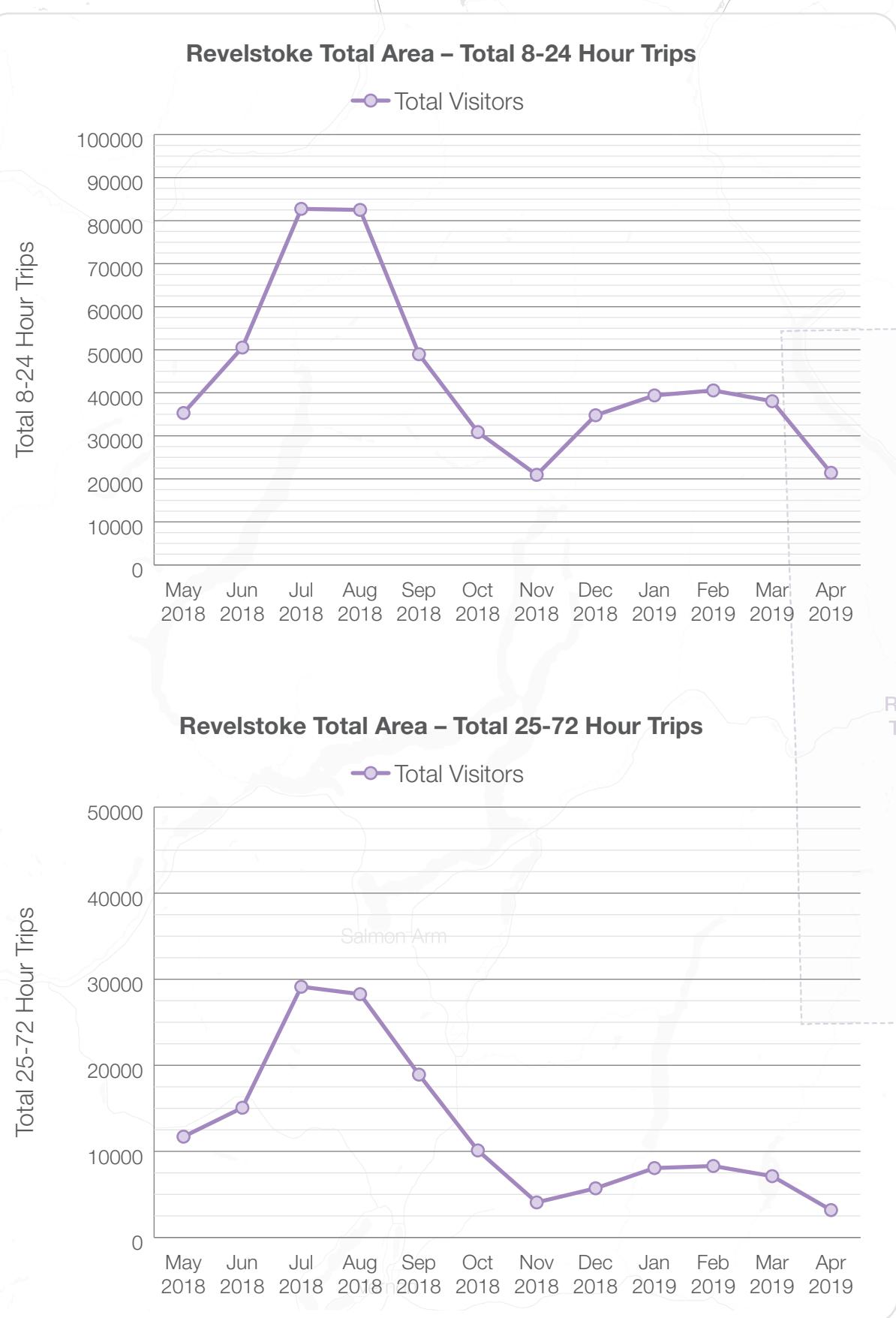
Length of Stay

Total Trip Counts

Total Visitors

May 2018 – April 2019

These charts show the total number of trips taken by all Canadian and International visitors to the Revelstoke Total Area. A trip is considered a consecutive period of time within the Total Area before being seen outside of it. Total trip counts were grouped by length of stay. These two line plots compare the monthly counts of 8-24 hour trips to 25-72 hour trips. 8-24 hour trips can be used as a proxy for short one night trips and 25-72 hour trips as a proxy for multi-night quality trips.



165K in summer

During July and August 165K short one-night trips were taken by visitors.

80K in winter

During January and February 80K short one-night trips were taken by visitors.

57K in summer

During July and August 57K multi-night quality trips were taken by visitors.

16K in winter

During January and February 16K multi-night quality trips were taken by visitors.

Length of Stay

Total Trip Counts

Canadian Visitors

Provincial markets

May 2018 – April 2019

These charts show the total number of trips taken by Canadian visitors to the Revelstoke Total Area. Canadian visitors are broken down by their assumed home province, these charts include counts of visitors from British Columbia, Alberta, and Saskatchewan. A trip is considered a consecutive period of time within the Total Area before being seen outside of it. Total trip counts were grouped by length of stay. These two line plots compare the monthly counts of 8-24 hour trips to 25-72 hour trips. 8-24 hour trips can be used as a proxy for short one night trips and 25-72 hour trips as a proxy for multi-night quality trips.



56% BC and AB

British Columbian and Albertan visitors took 56% of all short trips during August

44% BC and AB

British Columbian and Albertan visitors took 44% of all short trips during February.

68% BC visitors

During October, BC visitors took 67.7% (6K) of all quality multi-night trips. BC Visitors also took 66.3% of multi-night trips in November.

Length of Stay

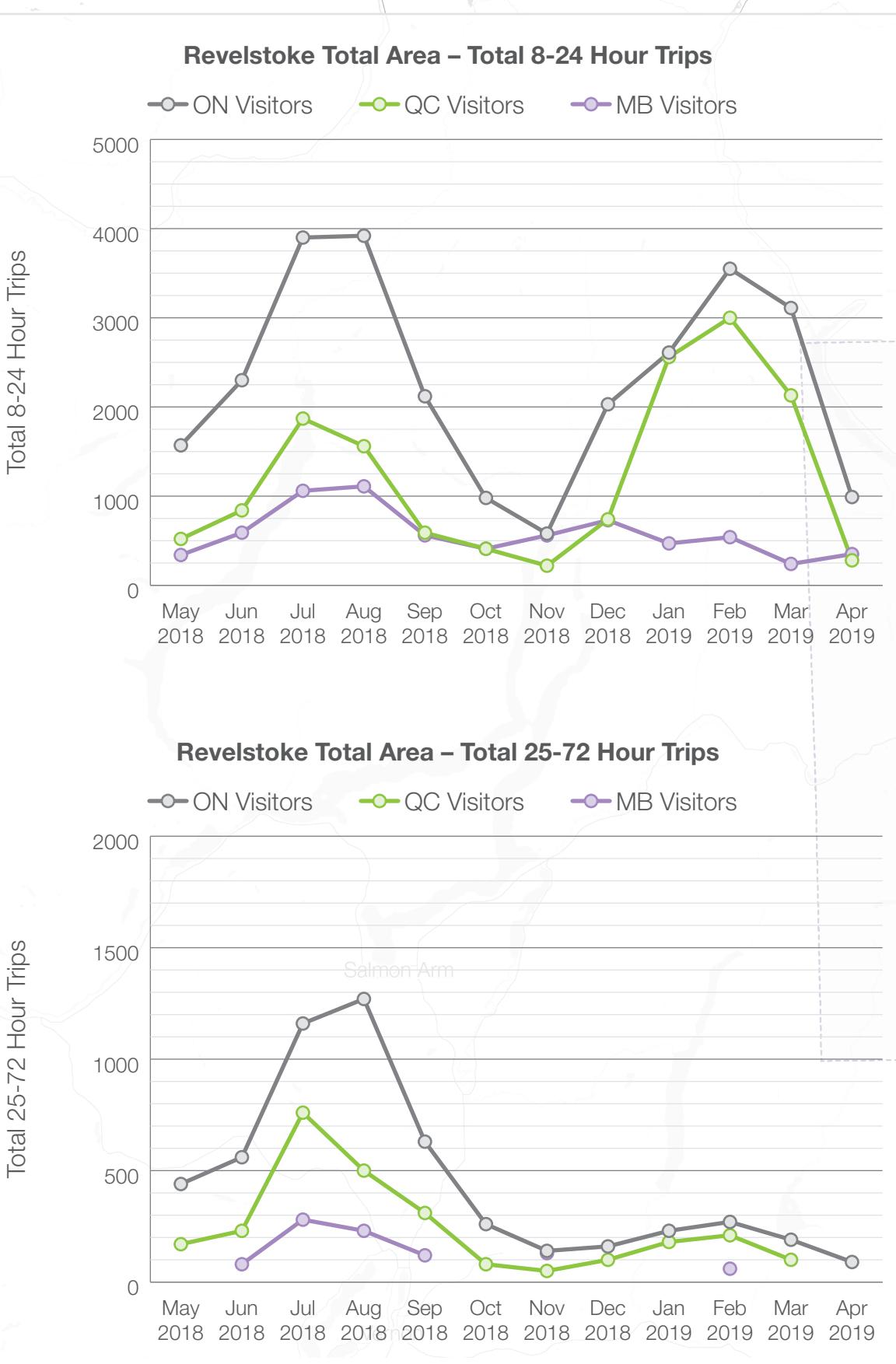
Total Trip Counts

Canadian Visitors

Provincial markets

May 2018 – April 2019

These charts show the total number of trips taken by Canadian visitors to the Revelstoke Total Area. Canadian visitors are broken down by their assumed home province, these charts include counts of visitors from Manitoba, Ontario, and Quebec. A trip is considered a consecutive period of time within the Total Area before being seen outside of it. Total trip counts were grouped by length of stay. These two line plots compare the monthly counts of 8-24 hour trips to 25-72 hour trips. 8-24 hour trips can be used as a proxy for short one night trips and 25-72 hour trips as a proxy for multi-night quality trips.



Ontario Visitors

Ontario visitors took 78K short trips in July and August and 66K in February and March. Being 8.8% of total short trips in February.

Quebec Visitor

Quebec took almost twice as many short trips in the winter months compared to the summer months.

3,690 Trips

Ontario and Quebec visitors took a total of 3,690 multi-day trips during July and August.

Winter Trips

During February, Ontario and Quebec visitors are 16% of short trips but only 5% of multi-day trips.

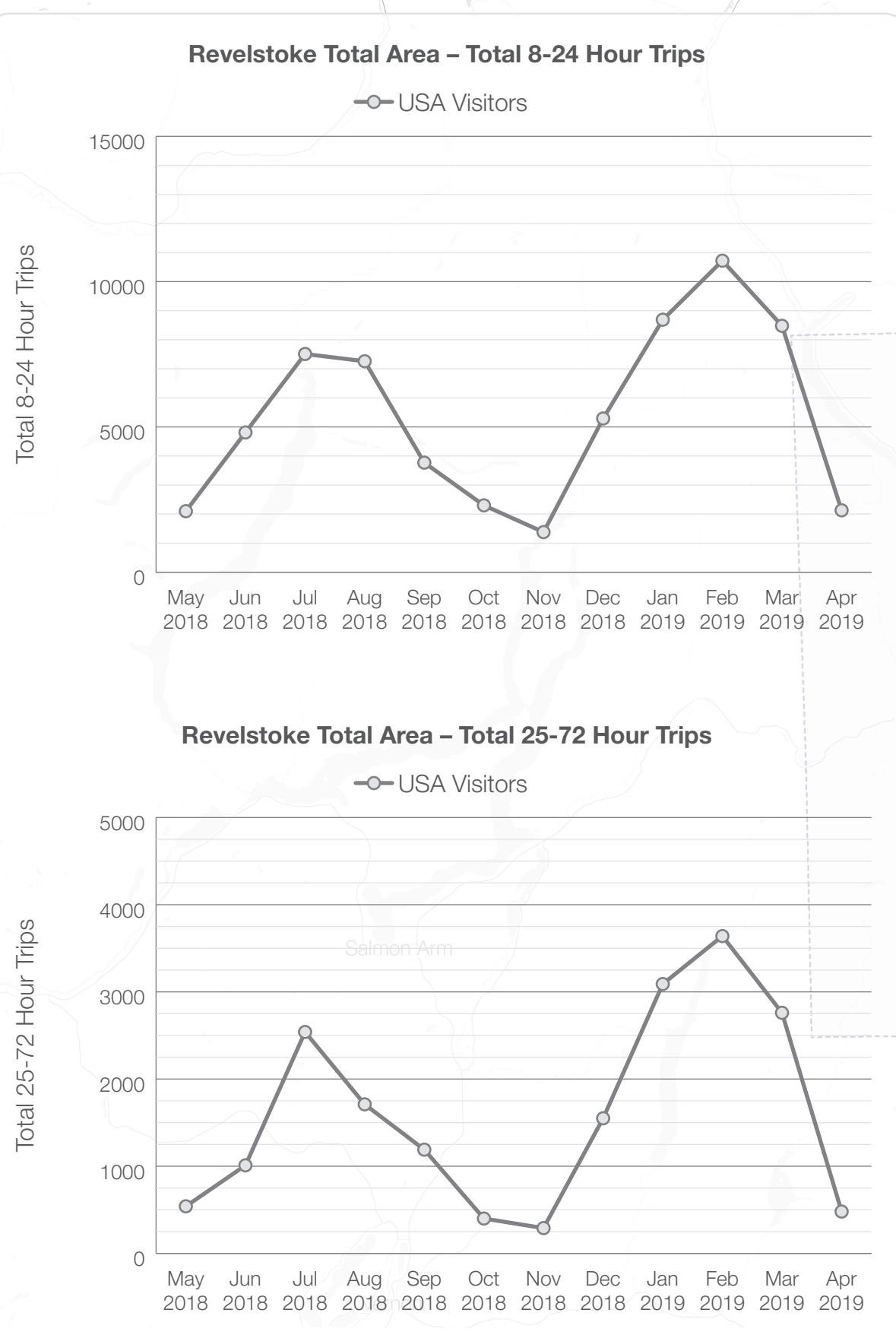
Length of Stay

Total Trip Counts

American Visitors

May 2018 – April 2019

These charts show the total number of trips taken by American visitors to the Revelstoke Total Area. A trip is considered a consecutive period of time within the Total Area before being seen outside of it. Total trip counts were grouped by length of stay. These two line plots compare the monthly counts of 8-24 hour trips to 25-72 hour trips. 8-24 hour trips can be used as a proxy for short one night trips and 25-72 hour trips as a proxy for multi-night quality trips.



10,720 Trips

In the month of February, American visitors took 10,720 short one-night trips. Representing 26% of short trips taken that month.

22-26% of trips

American visitors took between 22% and 26% of one-night trips monthly from January to March.

3,640 Trips

In the month of February, American visitors took 3,640 quality multi-day trips.

38-43% of trips

American visitors took between 38% and 43% of multi-night trips monthly from January to March.

Length of Stay

Total Trip Counts

International Visitors

Country markets

May 2018 – April 2019

These charts show the total number of trips taken by International visitors to the Revelstoke Total Area. International visitors are broken down by their country of origin, these charts include counts of visitors from Australia, Germany, and the United Kingdom. A trip is considered a consecutive period of time within the Total Area before being seen outside of it. Total trip counts were grouped by length of stay. These two line plots compare the monthly counts of 8-24 hour trips to 25-72 hour trips. 8-24 hour trips can be used as a proxy for short one night trips and 25-72 hour trips as a proxy for multi-night quality trips.



1,660 Australian

Australian visitors took 1,660 short one-night trips in January. Representing 22% of total short trips taken that month.

German Visitors

German visitors took 1,820 short trips and 1,520 multi-day trips in August.

6% September

German visitors also make up 6% of total multi-day trips taken during September.

Monthly Unique Visitors

Aggregate Demographics

Canadian Visitors

May 2018 – April 2019

These line plots show the month-over-month probable demographic characteristics of Canadian visitors to the Revelstoke Total Area. These results are based on the 2016 Stats Can Census reported demographics and are an aggregated representation of all Canadian visitors.

The top line plot compares Canadian visitor's likely age characteristic and the bottom line plot compares probable family size.

The Canadian aggregated demographics provided are based on the 2016 Statistic Canada Census. In order to calculate the demographics of Canadian visitors, every visitor's assumed home neighbourhood's demographics from the census are summed together, being weighted to the number of visitors coming from the specific neighbourhood. These adjusted values represent the probability of any given visitor having that specific demographic characteristic.

The Age Characteristic provided does not show any ages below 20 years, based on TELUS policy to not report on anybody under the age of 18. The census age breakdowns result in 20 being the lowest age reported.



Zoomer Trends

Zoomers (50-69 Years) have a probability of being around 30% of the visitor demographic. Trending above 30% during the fall.

Millennial Trends

Millennials (20-34 Years) have a probability of being around 20% of the visitor demographic. Trending above 20% during the winter.

Family Trends

Two person families have a probability of being around 60% of the visitor demographic. The probability of visitors being part of larger family demographics trends slightly higher during the summer.



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