

The Road Towards Data-Driven Destination Management

Experiences from the Thompson Okanagan Tourism Association (TOTA)

Presented by:

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Thompson Okanagan Tourism Association (TOTA)

X.FESTIVAL 2020

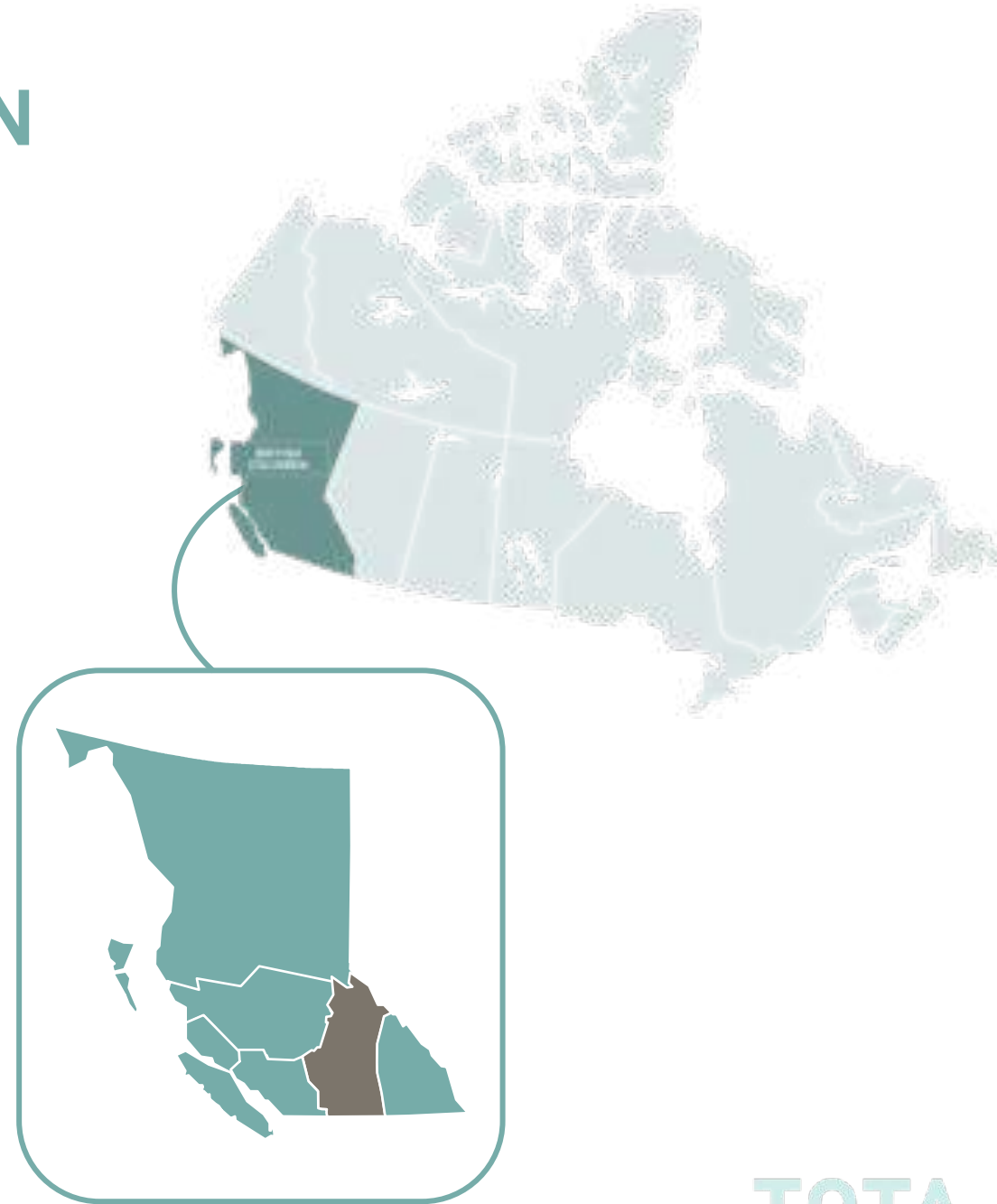
Reshaping the Visitor Economy

THOMPSON OKANAGAN REGION

Nestled in the Southern Interior of British Columbia, Canada, the Thompson Okanagan is a diverse region covering **approximately 71,600 km²**, roughly the same size as Ireland. Its name is derived from two major geographic features: the Thompson River and Okanagan Lake.

Home to over **90 communities, 33 Indigenous communities, and 4,500 tourism businesses**, it is a region rich in Indigenous culture, located on the traditional and unceded territories of the Syilx, Nlakápmux, and Secwépemc First Nations people.

The landscape is as varied as the tallest peak in the Canadian Rockies to the semi-arid climate of the Okanagan Desert, with sun-soaked valleys surrounded by sweeping grasslands and connected throughout by water.



The Thompson Okanagan's primary economic driver is tourism. Tourism generates over **\$3 billion** for the regional economy, attracting **5 million** visitors per year, and employing approximately **35,000 people** in our region.



ABOUT TOTA

The Thompson Okanagan Tourism Association (TOTA) is a not-for-profit society governed by the BC Societies Act. We are governed by an elected Board of Directors who represent business & community tourism interests throughout the region.

TOTA operates under a stakeholder model and we are guided through consultation with advisory committees on key initiatives. We are 1 of 5 regional tourism organizations in the province of BC that work under the Super, Natural British Columbia brand.



ACCREDITATIONS & COMMITMENTS



TOTA

RECOGNITION



World's Responsible
Tourism Award



North America's
Responsible Tourism
Award



World's Responsible
Tourism Award



North America's
Responsible Tourism
Award



TOURISM for
TOMORROW
DESTINATION AWARD 2018
WINNER



AWARD 2019

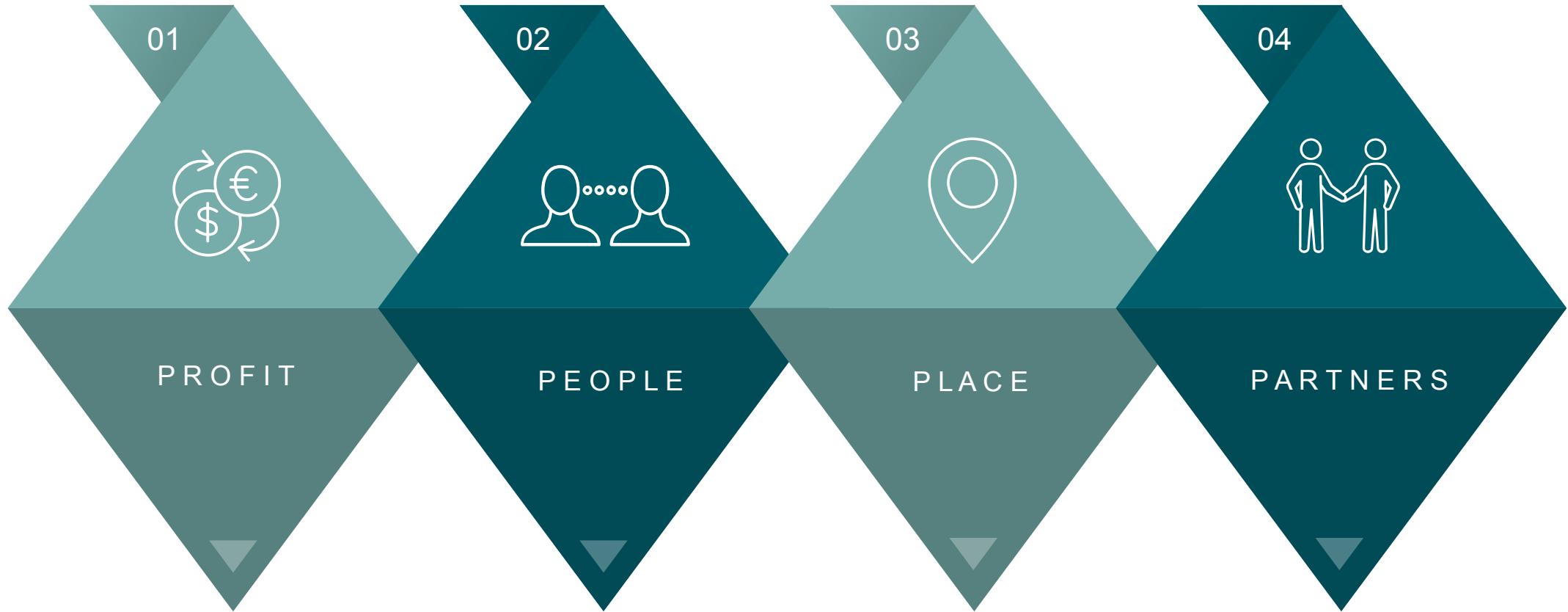


UNWTO AWARDS



TOTA

OUR REGIONAL FOUR "P'S"



REGIONAL PLEDGE

SUSTAINABLE TOURISM: WHAT IT MEANS TO US

01

PROFIT

The Economic Pillar

- Collaborate on developing a strong and sustainable economic environment
- Year-round revenue and employment opportunities
 - Remarkable and authentic destination experiences

02

PEOPLE

The Social Pillar

- Balancing the needs of the individual with the needs of the community
- Accessibility to an inclusive environment for all
 - Respecting our diverse heritage and rich Indigenous culture

03

PLACE

The Environmental Pillar

- Working toward reducing our collective impact on the environment
- Safeguarding our lands and ecosystem
 - Building sustainable and responsible infrastructure

04

PARTNERS

The Collaborative Pillar

- A common commitment to preserve the Thompson Okanagan for future generations
- Build and foster relationships focused on the pursuit of a common cause

UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS

1 NO POVERTY



2 ZERO HUNGER



3 GOOD HEALTH AND WELL-BEING



4 QUALITY EDUCATION



5 GENDER EQUALITY



6 CLEAN WATER AND SANITATION



7 AFFORDABLE AND CLEAN ENERGY



8 DECENT WORK AND ECONOMIC GROWTH



9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



10 REDUCED INEQUALITIES



11 SUSTAINABLE CITIES AND COMMUNITIES



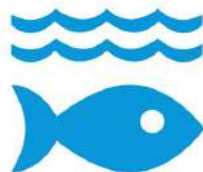
12 RESPONSIBLE CONSUMPTION AND PRODUCTION



13 CLIMATE ACTION



14 LIFE BELOW WATER



15 LIFE ON LAND



16 PEACE, JUSTICE AND STRONG INSTITUTIONS

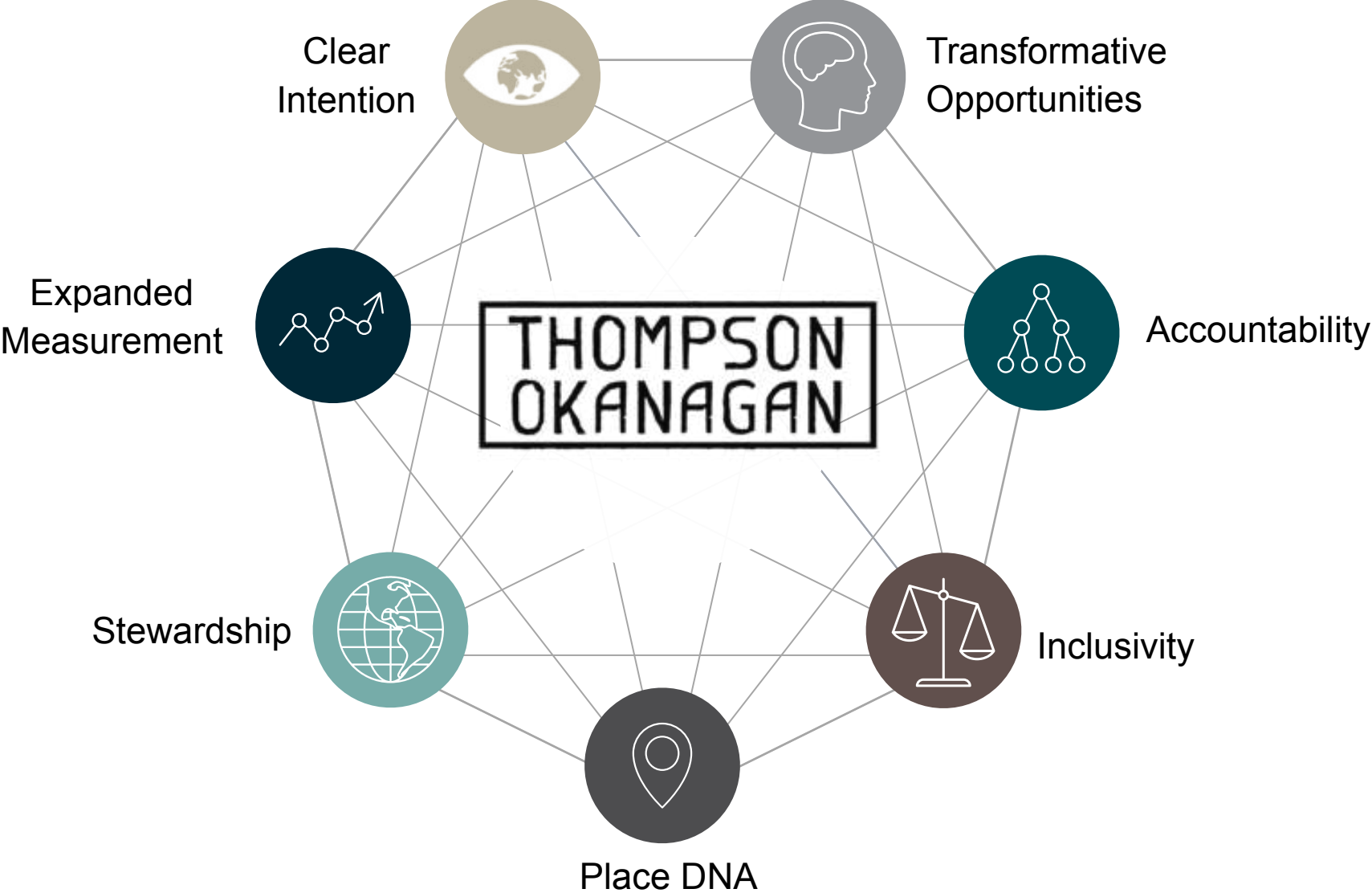


17 PARTNERSHIPS FOR THE GOALS



TOTA

OUR REGIONAL APPROACH





CLEAR INTENTION

REGIONAL DEVELOPMENT STRATEGY

In 2012, TOTA completed the 10-year Regional Tourism Strategy – ***Embracing Our Potential***

In 2019, TOTA completed an updated version of the Strategy: ***Embracing our Potential 2.0***



REGIONAL DEVELOPMENT STRATEGY



CORE PRINCIPLES



Rethink: What we value and how we measure success



Confront: Zero-sum thinking



Change: Products vs. Experiences



Understand: Right vs. Privilege



Respect: Society and (versus) Tourism



Opportunity: Destinations as living labs & transformative travel

OUR VISION 2030



EXPANDED MEASUREMENT:

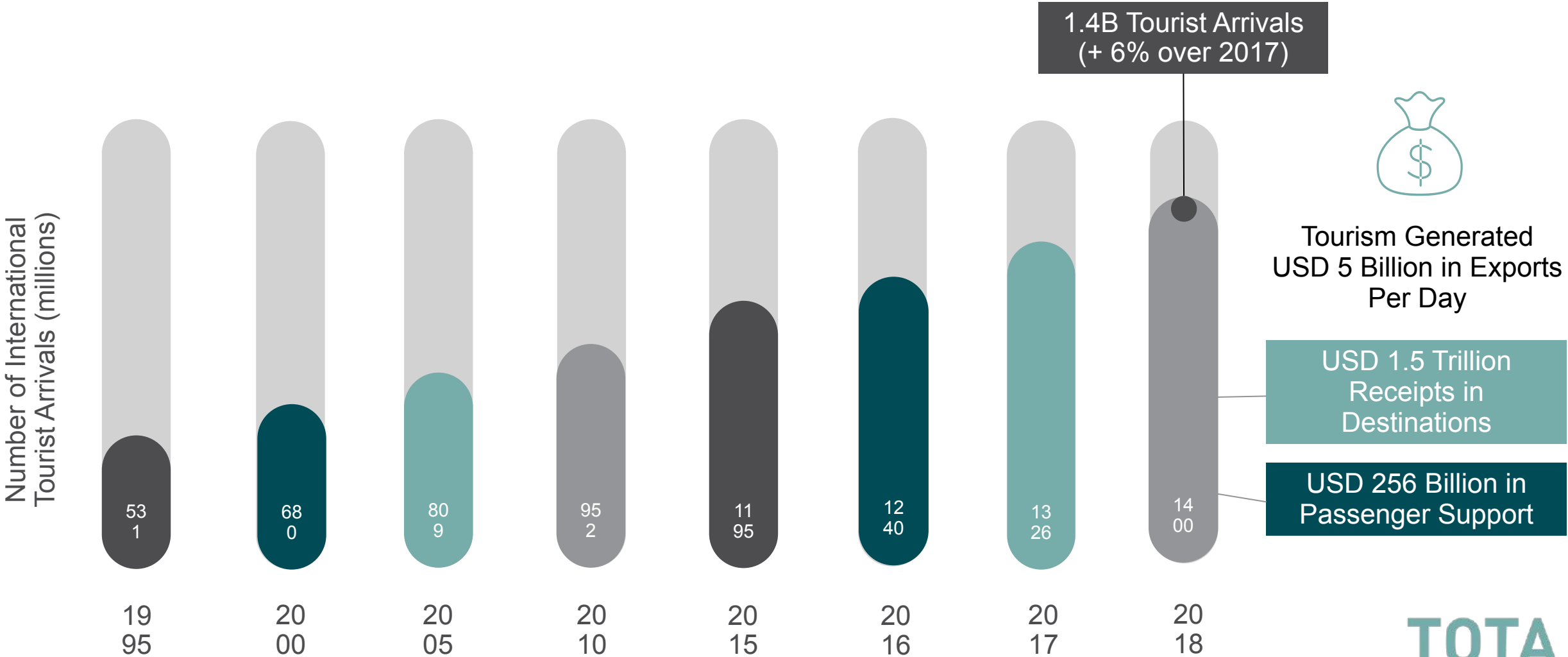


THE IMPORTANCE OF DATA-DRIVEN
DESTINATION MANAGEMENT

TOTA

TOURISM'S UNPRECEDENTED GROWTH

INTERNATIONAL TOURIST ARRIVALS GLOBALLY



“1.8 BILLION TRAVELLERS BY 2030 COULD
BE 1.8 BILLION OPPORTUNITIES OR
1.8 BILLION DISASTERS
AND IT IS UP TO ALL OF US TO CHOOSE.”

Dr. Taleb Rifai, Former Secretary-General of the UNWTO

THE RISE OF “OVERTOURISM”

ONE OF OXFORD
DICTIONARY'S WORDS OF
THE YEAR IN 2018

The Absence of Responsible
and Sustainable Destination and
Business Management Practices

Travel · News

'Overtourism' shortlisted as Word of the Year following Telegraph Travel campaign



'Overtourism' has been selected as one of Oxford



Oxford Dictionaries @OxfordWords

Follow

'Overtourism' is defined as 'an excessive number of tourist visits to a popular destination or attraction, resulting in damage to the local environment and historical sites and in poorer quality of life for residents', and has become a heavy burden for many 'must-see' locations



Oxford Dictionaries @OxfordWords · 16 Nov 2018

According to our data, use of 'overtourism' shot up in 2017 - thanks in part to mass protests across Europe - and subsequently emerged in 2018 as the go-to term, surpassing both 'anti-tourism' and 'tourism-phobia', which have been used to similar effect.

SCIENCE • CLIMATE CHANGE

Climate Change Is Shaping Up As an Utter Disaster for Much of America's Bird Life



Climate Change Is Destroying Our National Parks

New research suggests that national parks are getting hotter and drier faster than the rest of the country



ENVIRONMENT

If Emissions Continue, India Could See 1 Million Heat Deaths a Year

Premature deaths from extreme heat next century could top those from infectious diseases today

CLIMATE CHANGE AND SECURITY

The Oceans Are in Peril—and the IPCC Report Confirms It

By Rachel Westrate Tuesday, October 22, 2019, 10:10 AM

| SCIENCE |

Climate change is contributing to California's fires

Dry seasons are intensifying, increasing fire risk. And when autumn winds kick in, as they have this week, the flames break loose. Expect more of that.



Rach...
Scho...
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the H...
and a...
and E...
scho...
at the...
Wash...

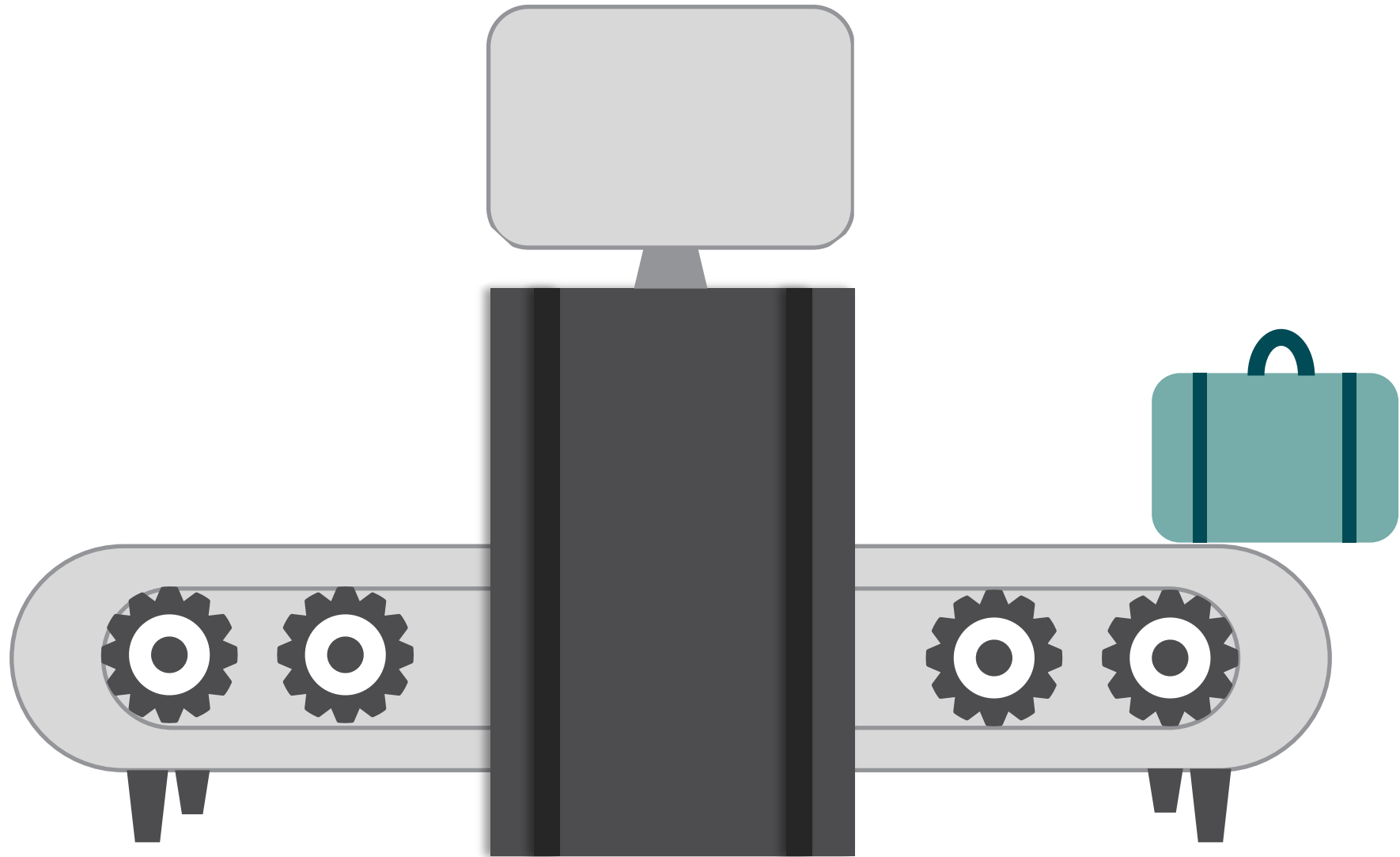
MORE

MODEL IN CRISIS...

WHY DID THIS HAPPEN?

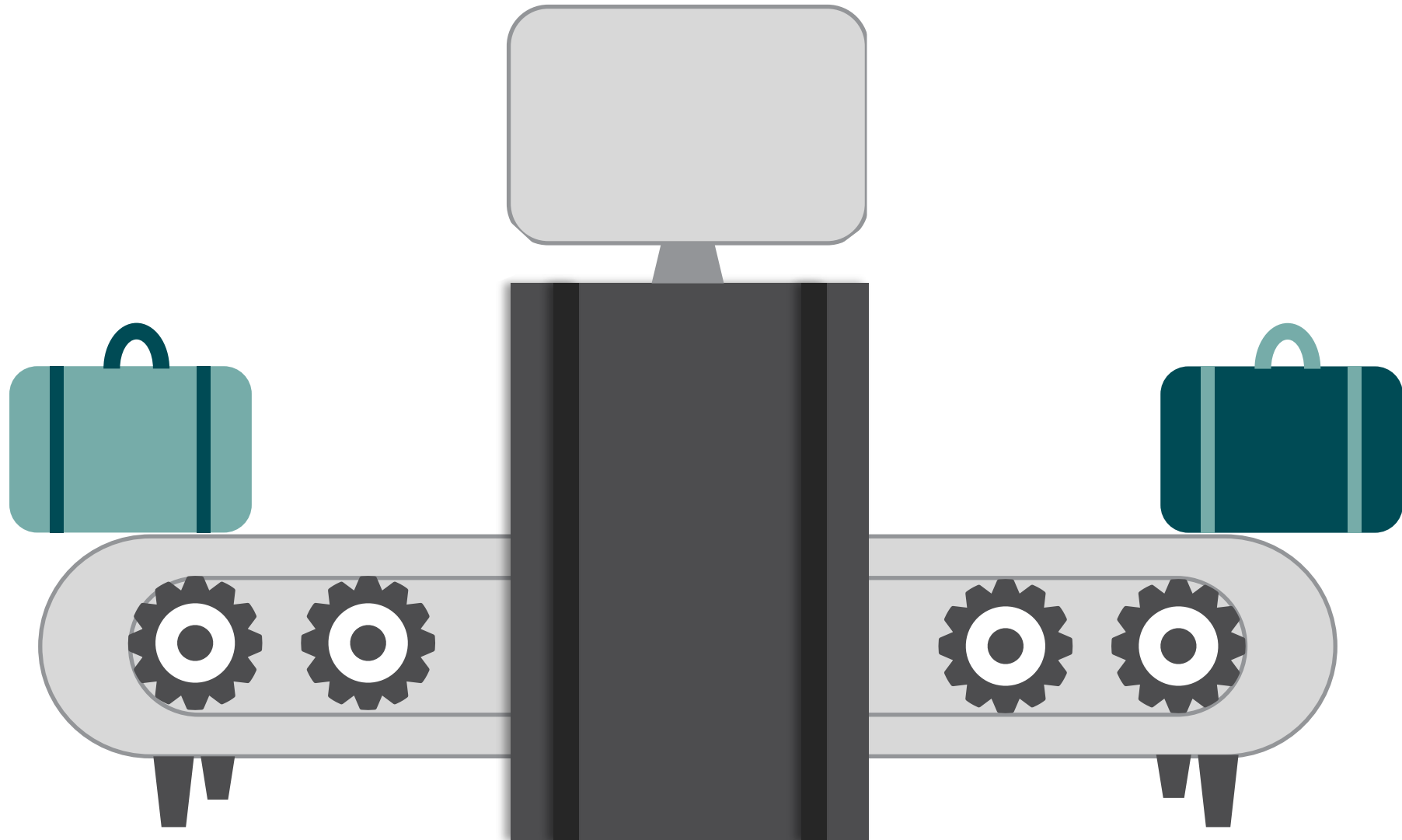
PROBLEMS WITH THE TRADITIONAL
LINEAR CONSUMPTION &
PRODUCTION MODEL

MEASURES OF SUCCESS



TOTA

MEASURES OF SUCCESS





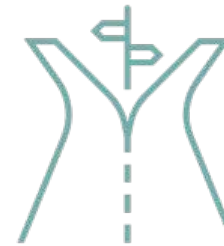
WITHOUT
BETTER
INFORMATION



NO BETTER
UNDERSTANDING



WITHOUT
BETTER
KNOWLEDGE



NO BETTER
DECISION-
MAKING



WITHOUT
BETTER
ACTIONS



NO CHANGE &
TRANSFORMATION

AND IN TIMES OF CRISIS

we are reminded that:

more holistic;
timelier;
more regular;
more georeferenced;
more detailed information

... enables us to better understand the quickly changing dynamics and make better-informed decisions.

WHY IT MATTERS, especially now...

As of September 2020, more than 121 million jobs and livelihoods in the Travel and Tourism sector have been impacted globally.

The estimated direct impact to the Canadian tourism sector will amount to an approximate GDP decline between **\$17.6 billion and \$23.3 billion**, with a potential loss of **306,000 and 406,000 jobs**, respectively.

If borders remain closed until the end of 2020, there will be an estimated 61% drop in revenues in 2020....

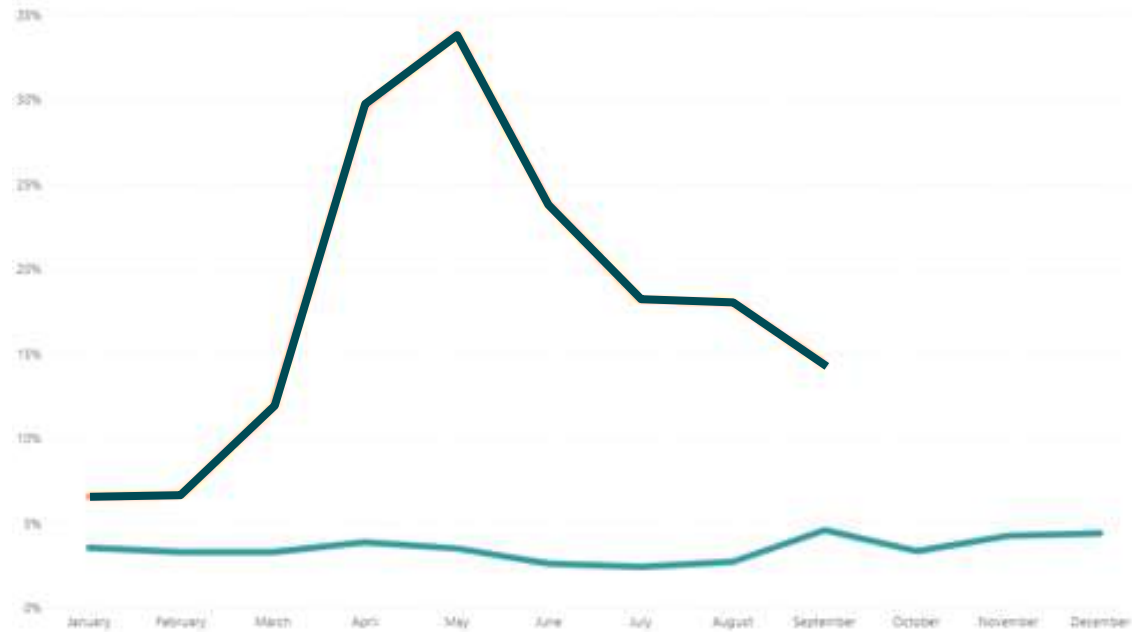
...”We also shouldn’t expect to see recovery to 2019 levels until 2024”.

Region	Jan	Feb	Mar	Apr	May	Jun	YTD
Africa	2	1	-43	-99	-99	-99	-57
North Africa	5	5	-37	-97	-99	-99	-62
Subsaharan Africa	1	0	-36	-100	-99	-100	-54
Americas	0	3	-49	-84	-89	-82	-55
Caribbean	-2	0	-57	-99	-99	-99	-58
Central America	-3	7	-55	-96	-99	-99	-55
North America	4	4	-45	-81	-90	-90	-56
South America	-5	1	-56	-99	-100	-100	-52
Asia and the Pacific	-5	-51	-82	-99	-99	-99	-72
North-East Asia	-19	-80	-94	-99	-99	-99	-83
Oceania	6	-20	-60	-99	-99	-99	-58
South Asia	7	-4	-70	-97	-99	-100	-55
South-East Asia	7	-36	-72	-99	-99	-99	-64
Europe	5	2	-81	-98	-99	-99	-66
Central/Eastern Europe	1	-2	-46	-97	-97	-99	-62
Northern Europe	5	4	-57	-97	-97	-94	-64
Southern/Medit. Europe	5	1	-69	-97	-99	-94	-72
Western Europe	8	6	-64	-96	-97	-92	-63
Middle East	5	-25	-45	-94	-94	-94	-57
Middle East	5	-25	-45	-94	-94	-94	-57
World	1	-16	-64	-97	-96	-93	-65

(International Tourism Arrivals, Source: UNWTO)

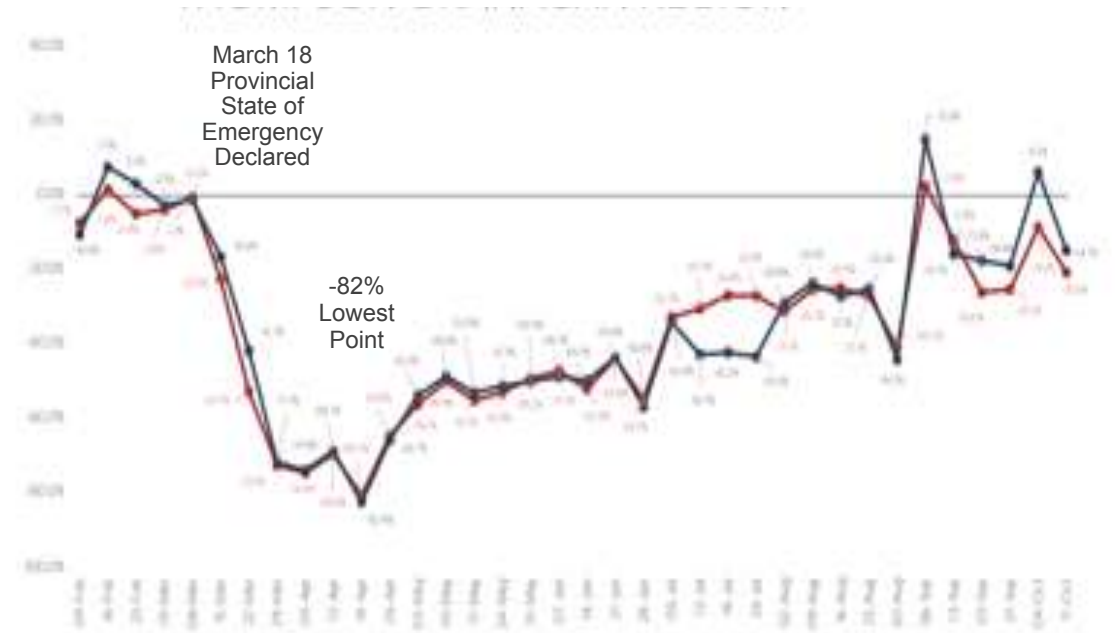
WHY IT MATTERS, especially now...

2019 and 2020 Tourism unemployment rate in BC, Canada



(Source: TourismHR Canada)

Domestic Overnight Visitation (year over year)



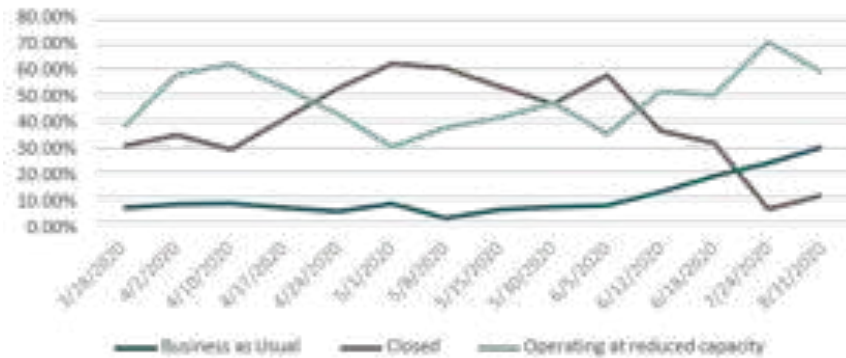
(Source: BC Regional Tourism Secretariat - Measuring Canadian Travel Patterns Thompson Okanagan Region)



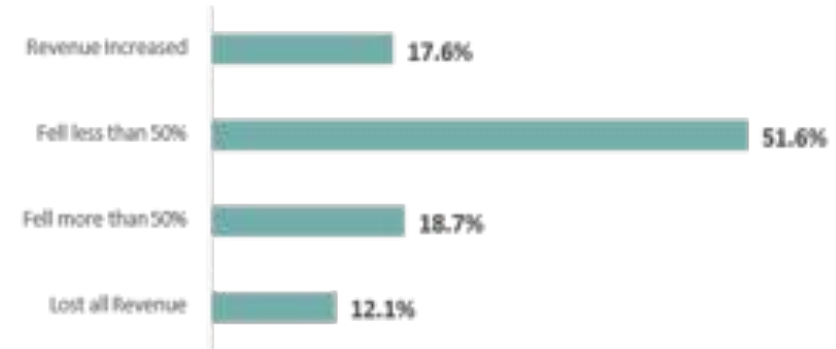
COVID-19 IMPACT SURVEY RESULTS

The graphs below outline the latest Thompson Okanagan survey results regarding the impact of COVID-19 on the tourism sector.

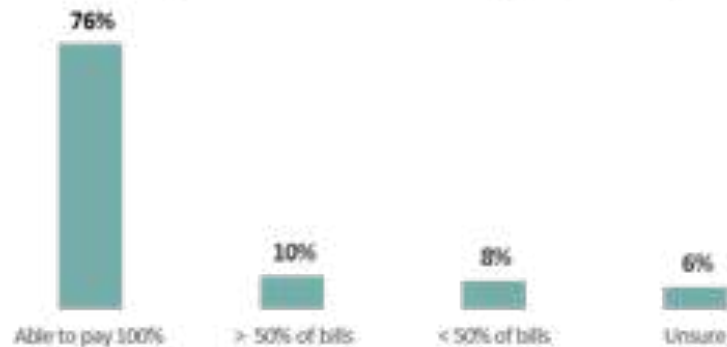
Impact of COVID-19, share of responses since start of survey



Proportion of respondents per change in revenue group



Do / Did you have the cash to pay your July bills?



Year-over-year change in revenue and percentage of firms without the cashflow to pay all of their bills



Source: BC Regional Tourism Secretariat. COVID-19 Tourism Impact Report. Weeks of July 27 - September 1, 2020.



WHY IT MATTERS, especially now...



WE NEED BETTER INFORMATION ABOUT
TOURISM'S IMPACTS TO EXPAND OUR
MEASURES OF SUCCESS.

EXPANDED MEASUREMENT:



TOWARDS A REGIONAL DATA HUB

TOTA

A central data hub that provides continuous and timely insights into tourism-relevant trends and dynamics in the region for a range of stakeholder audiences.

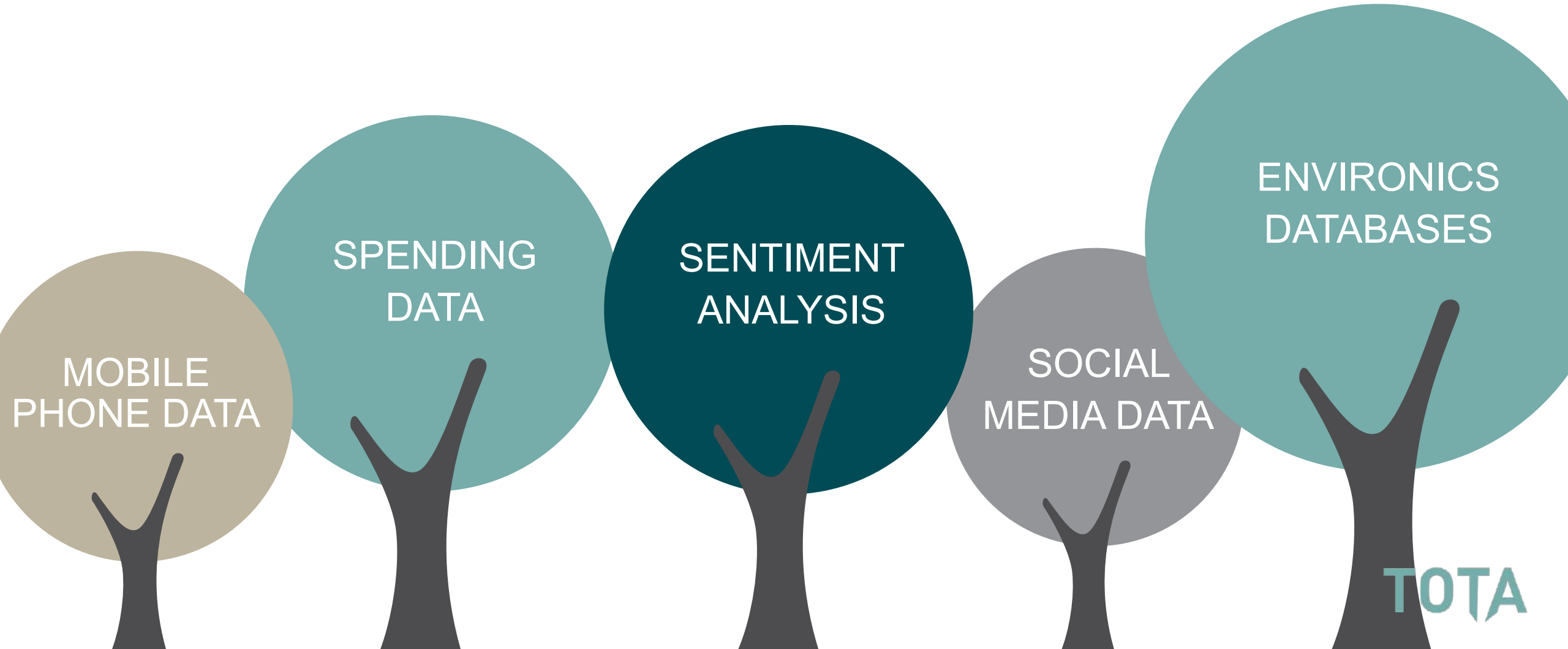
A CULTURAL CHANGE....

- Making it easier for stakeholders to find information
- Reduce time to access data
- Facilitate understanding of data
- Encourage stakeholders to love and lean on data
- Improve the ability to analyze data
- Increase commitments to data sharing
- Foster regular data inquiries



RESEARCH AND THE UTILIZATION OF BIG DATA

BUILDING ON ONGOING EFFORTS



OUR COMMITMENT

In 2019, Thompson Okanagan was formally accepted as one of 31 observatories in the UNWTO International Network of Sustainable Tourism Observatories.

TOTA defined 14 Key Areas of Focus for Monitoring:

1. Local Satisfaction with Tourism
2. Destination Economic Benefits
3. Employment, HR/Labor
4. Seasonality
5. Energy Management
6. Water Management
7. Sewage Treatment
8. Solid Waste Management
9. Development Control / Land Use
10. Climate Change and increased extreme weather events
11. Intra-regional connectivity & mobility
12. Indigenous products, experiences & community impacts
13. Sustainable Tourism Practices
14. Universal Inclusivity / Accessibility



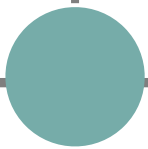


TOTA's TOURISM
DATA PLATFORM:
THE NEXT STEP

TOTA

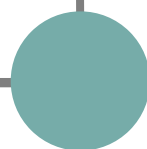
PHASED APPROACH

**PREPARATION
PHASE**



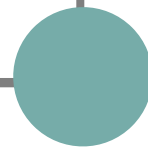
**Summer /
Fall 2020**

**DESIGN OF
PROTOTYPE**



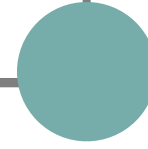
**Winter /
Spring 2021**

**LAUNCH
VERSION 1**



**Spring /
Summer 2021**

**EXTENSIONS &
MAINTENANCE**



**Rest of
2021 and beyond**



PREPARATION PHASE

INTERNAL
STRATEGY
FORMULATION

INTERNAL
INDICATOR
REVIEW

INTERNAL DATA
REVIEW

EXTERNAL
STAKEHOLDER
TALKS

EXTERNAL DATA
REVIEW

SEARCH FOR
TECHNICAL
PARTNER



PREPARATION PHASE – INTERNAL PROCESS

INTERNAL STRATEGY FORMULATION

- What is our vision and timeline?
- What are our specific objectives?
- How can we break the process into digestible and achievable pieces?
- What resources does this project require?
- What are our expectations for each phase?
- Which expectations are realistic?
- Who are important champions we need to engage?
- Who are the key user groups & what are their needs?
- How do we create a (financially) sustainable model?

PREPARATION PHASE – INTERNAL PROCESS

INTERNAL STRATEGY FORMULATION

INTERNAL INDICATOR REVIEW

- Which indicators are we already monitoring?
- Which new indicators do we want to monitor?
- Which have priority and why?
- Which indicators have we committed to in our different programs?
- Which indicators do we need to review and adapt to make them more achievable?
- What other kinds of information do we need to collect to cover all envisaged indicators?
- Which indicators are repetitive, which need to be reformulated to align better with official standards?
- Which indicators can we integrate into already existing processes?

PREPARATION PHASE – INTERNAL PROCESS

INTERNAL STRATEGY FORMULATION

INTERNAL INDICATOR REVIEW

INTERNAL DATA REVIEW

- What data do we currently collect?
- Which indicators does that data cover?
- Through which programs/activities does the current information come from? What are the data sources?
- What are the current data collection methods?
- What is the quality of the information?
- Where are the most significant data gaps?
- What information has priority and from whom do we collect that information?
- What resources do we have for the data work and how to best enable and empower them?
- Which information needs to be standardized?

PREPARATION PHASE – EXTERNAL PROCESS

STAKEHOLDER ENGAGEMENT SESSIONS

- Who will be the key users of the data platform?
- Which stakeholder groups do we have?
- What kind of information are they working with?
- What information would they like to have?
- How developed are their data management capacities?
- What are their biggest challenges when it comes to data?
- Which data is most important to help them with their core activities?
- Which partners have good data that could potentially be integrated?

PREPARATION PHASE – EXTERNAL PROCESS

STAKEHOLDER ENGAGEMENT SESSIONS

EXTERNAL DATA REVIEW

- What other external data sources exist that we have not considered yet?
- What other publicly available data would be interesting to include?
- What open data portals exist in the region, province, country?
- What quality does the data have?
- What are the best ways of connecting the data into the platform?
- Which partners do we need to speak with to make it happen?
- Which of the available information has priority?

PREPARATION PHASE – EXTERNAL PROCESS

STAKEHOLDER ENGAGEMENT SESSIONS

EXTERNAL DATA REVIEW

SEARCH FOR TECHNICAL PARTNER

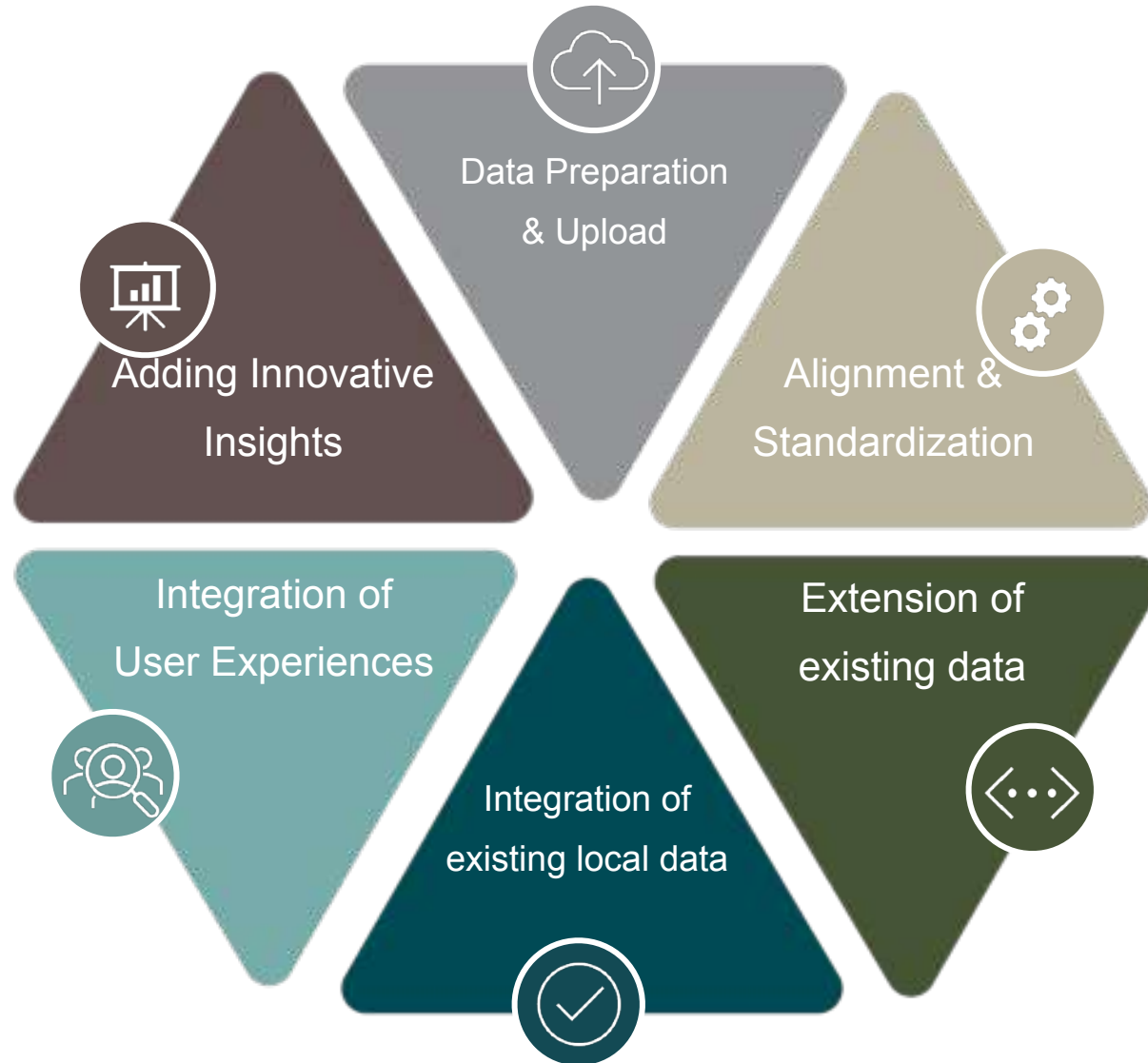
- Which approach do we want to adopt? Start from scratch or build on existing structures?
- What are our requirements for the companies we want to work with?
- How much ownership do we want in the short, medium and long-term?
- Which companies have the required expertise?
- Which kind of partnership do we want?
- How best to integrate the already gathered knowledge into the more technical phases?
- Which criteria have more weight for our specific case?
- What are the budget and time considerations?



LESSONS LEARNED...

- Don't start running without knowing why
- Do the homework first
- Closing the imagination gap: talk about expectations often
- Think about the long-term financial sustainability from the beginning
- Think about how you create value for different stakeholder groups
- Think about long-term ownership
- Throughout entire process: the art lies in prioritizing

THE WAY FORWARD: OUR FOCUS AREAS

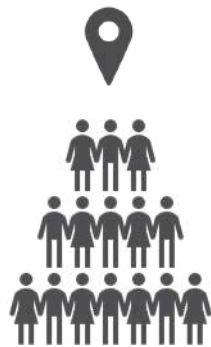


CLIMATE-AWARE MARKETING

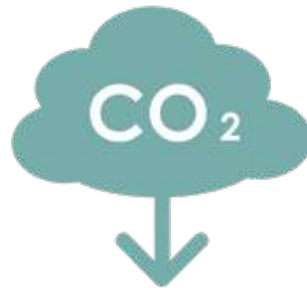
- Analysis of visitor patterns and market segments help us understand visitor impact and volumes
- Attracting the right type of visitor to the right location at the right time of year, helping to complement resident desire for **Authentic Experiencers** and **Cultural Explorers**.



Mobile Insights
Deliver Visitor
Data



Environics Analysis
including Explorer
Quotient Profiling



Analyzing origin,
length of stay, and
transport method of
potential visitor



Use in Marketing
Initiatives to Hyper-
Target Potential
Visitors



Analyze Return on
Investment by Number of
People Who Saw Ads
That Actually Visited
Destination



.....

GOING BEYOND DATA

.....

**GOING BEYOND THE
MOUNTAIN**

TOTA

HOW DO WE
FUNDAMENTALLY
TRANSFORM TOURISM
INTO A RESILIENT AGENT
OF POSITIVE CHANGE?



TOTA

IT'S ABOUT VALUES

“When the blood in your veins returns to the sea,
and the earth in your bones returns to the ground,
perhaps then you will remember that this land does not belong to you,
it is you who belongs to this land...”

OUR TRANSFORMATION DOES
NOT HAVE FRONTIERS.



THANK YOU

Glenn Mandziuk

President & CEO

Thompson Okanagan Tourism Association

CEO@TOTABC.com

TOTABC.org

TOTA THOMPSON OKANAGAN
TOURISM ASSOCIATION



· Certified
· Gold
· Destination
· 
· BDT 005/2017 RTI



INSTO

World Tourism Organization
International Network
of Sustainable Tourism
Observatories