Putting Canada on the Map:
Enhanced Tourism Insights from Coast to Coast, to Coast

June 23rd, 2025

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Today's Presenters

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Senior Director, Product Management

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VP, Account Management

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VP, Business Development – Tourism Lead

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Agenda

- Welcome!

- VisitorView Reloaded: What's New

- Sneak Peek!

- On the ground: Use Cases

- Thank you

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VisitorView Reloaded: What's New

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VisitorView: A Comprehensive Tourism Intelligence Product

A class-defining solution for analyzing and understanding overnight visitor travel patterns across Canadian destinations.

Where are most visitors coming from? (Domestic, US, International)

What are the peak travel months in my region?

Which areas experience the highest overnight visitor activity?

How long do overnight visitors typically stay in a destination?

Integrate with PRIZM to gain deeper insight into visitor lifestyles

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What's New with VisitorView: Enhanced Methodology & Coverage

Expanded Geographic Detail for Destinations

- Province

- Tourism Region

- NEW Census Subdivisions (CSD)

- NEW Census Metropolitan Areas (CMA)

- NEW Census Divisions (CD)

- NEW Client Destinations (Custom)

Aligned Methodologies

- Consistent modelling across **VisitorView** for domestic, American and international visitors for holistic comparisons
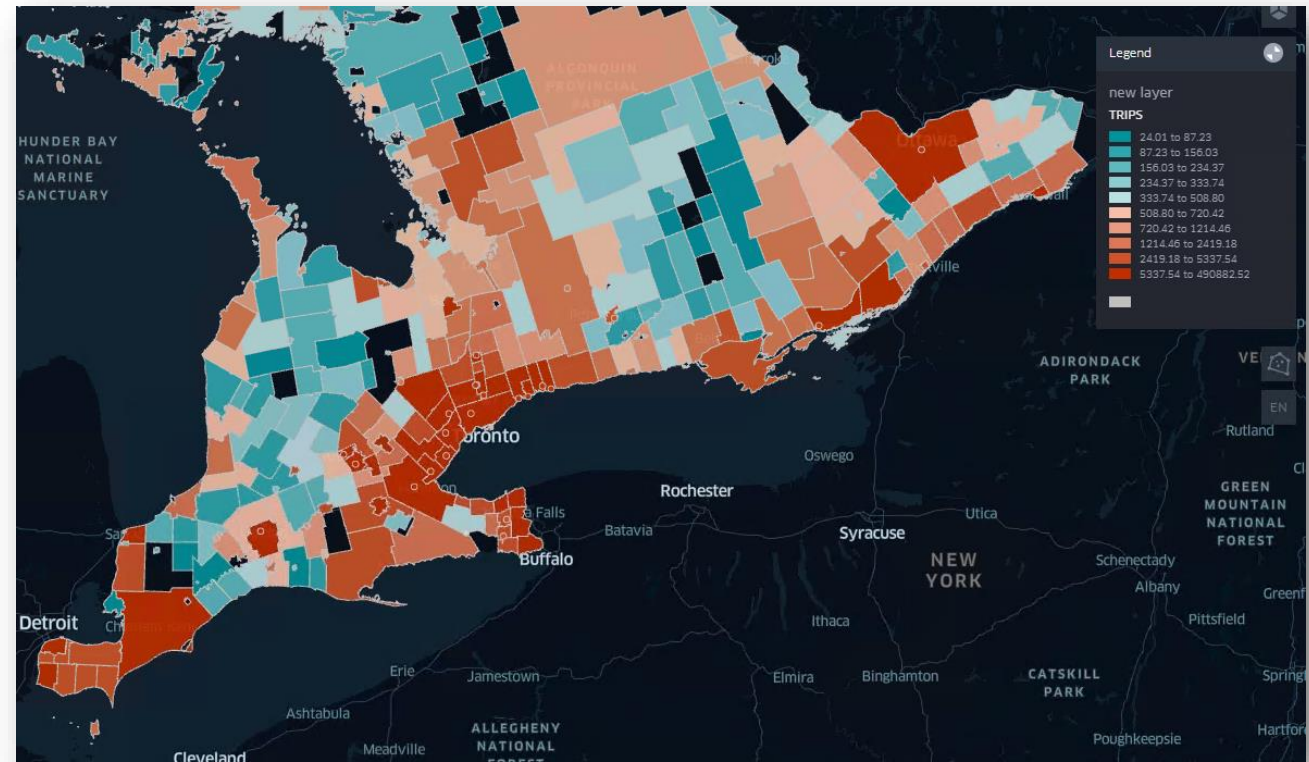
Improved Destination Accuracy

- Enhanced detection of overnight stays using advanced cellular network data analysis

Refined Tourism Filters

- Reduce noise from non-tourism movement and redefine trip length thresholds to better identify visitor activity

Distribution of Trips from US to Ontario at CSD Level

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What's New with VisitorView: Product Specific Enhancements

VisitorView Canada 🇨🇦

- Updated visitor definition now includes visitors venturing 40+ km from home, aligning with industry standards of overnight visitors

VisitorView U.S. 🇺🇸

- Improved origin estimation using two years of Visitor Travel Survey data (VTS), resulting in superior trip matching, and integration of vehicle border entry data to enhance trip estimates

VisitorView International 🇺🇳

- Destination estimates are now controlled at the province of entry level for upgraded regional-level projections

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What Variables are Available?

Measures	Time Frames	Years
Visitors (CA)	Full Year	2022
Trips	Quarters	2023
Nights	Seasons	2024
Nights/Trip	Months	2025
Nights/Visitor (CA)		

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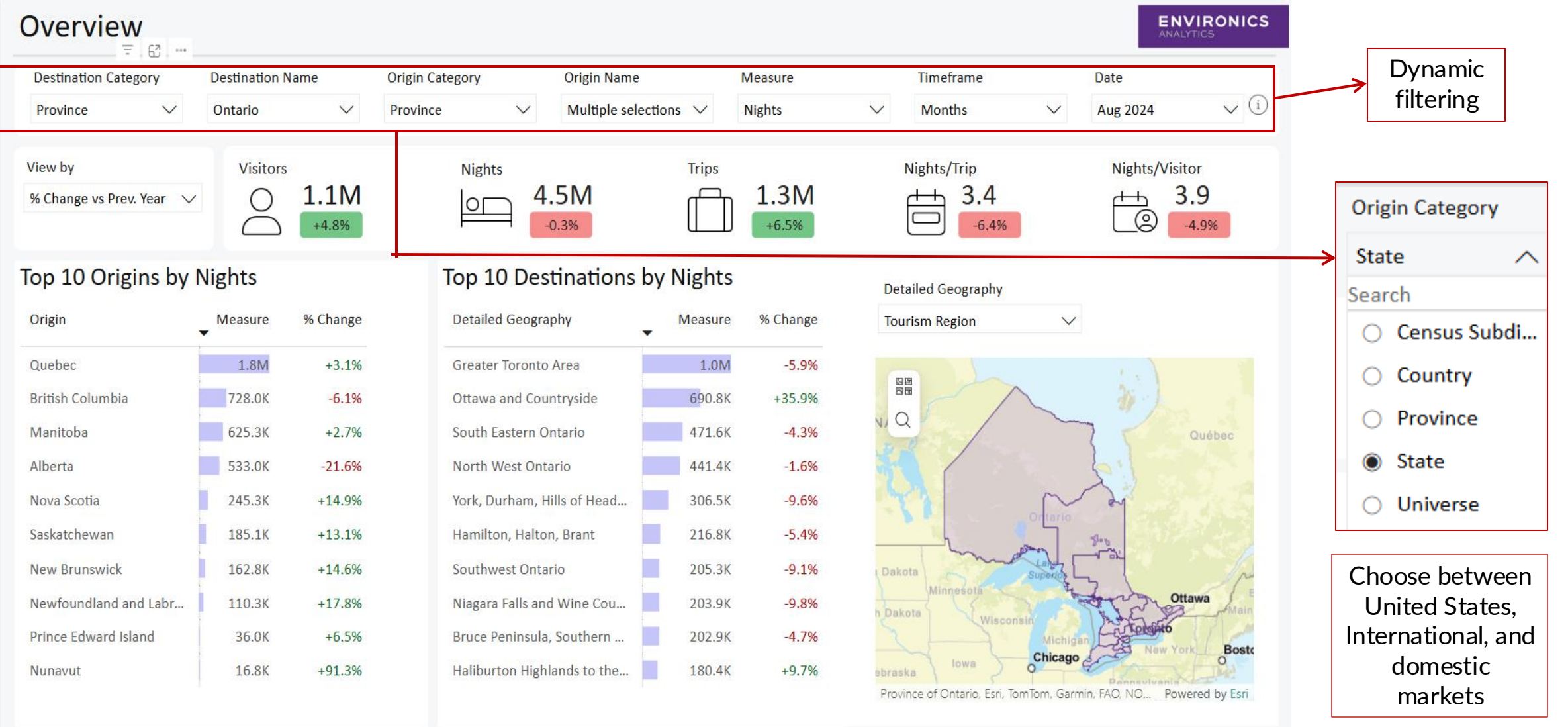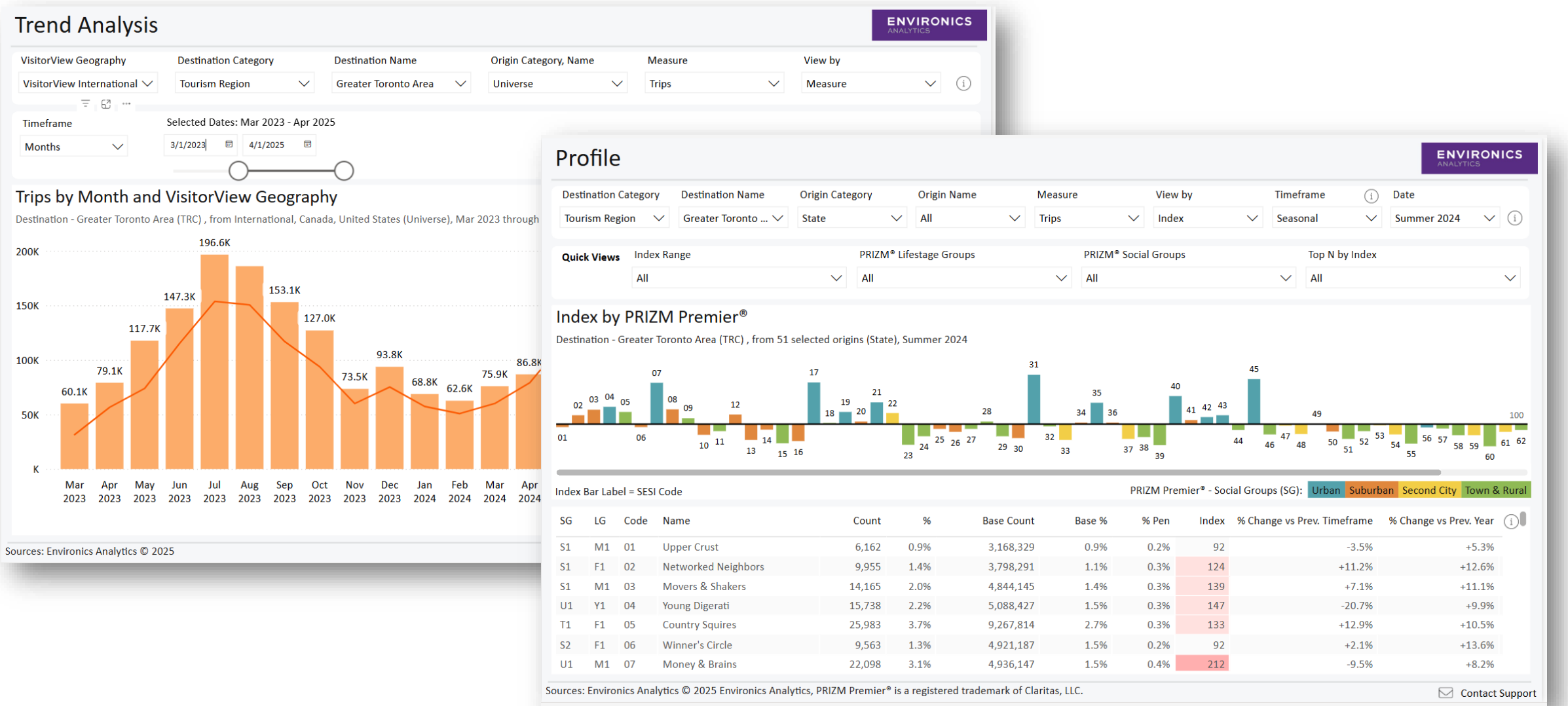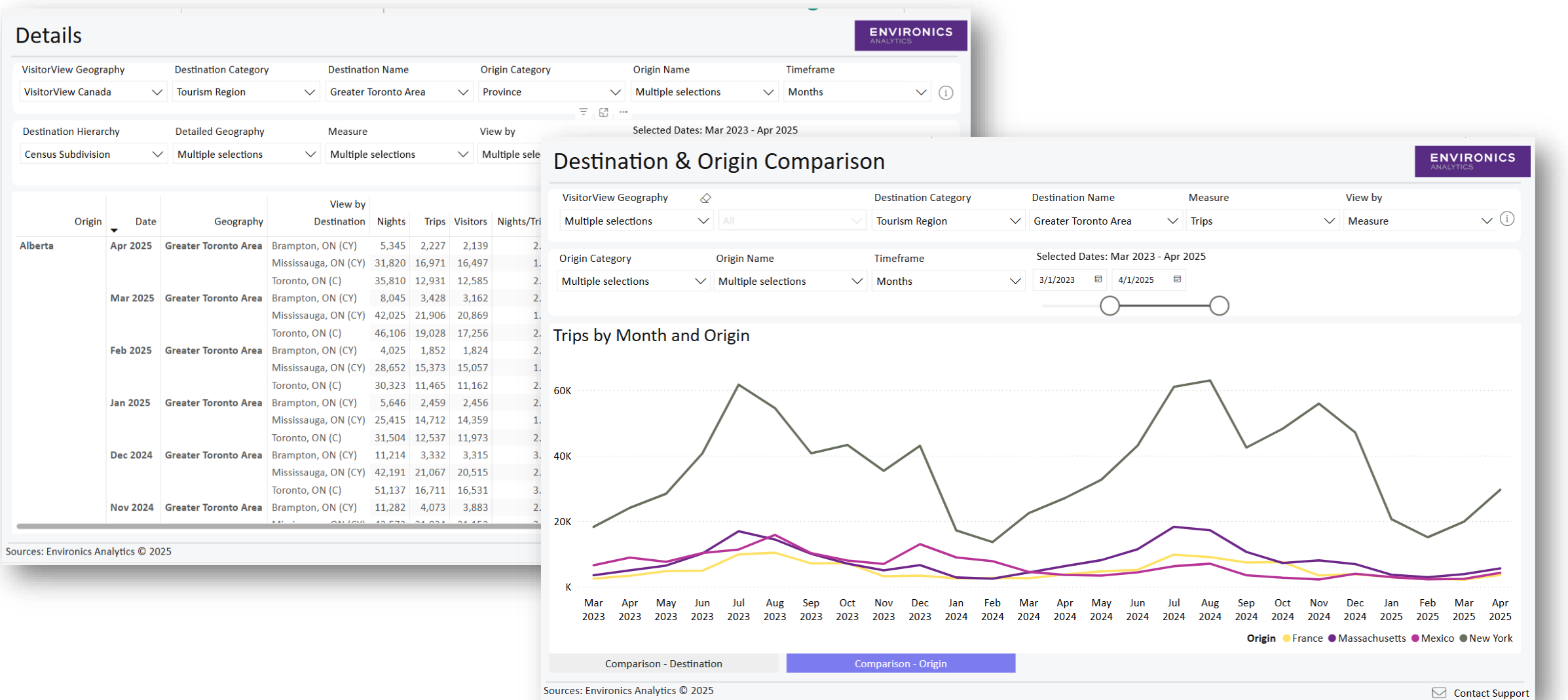
A Look Inside the New VisitorView Dashboards

A Look Inside the New VisitorView Dashboards

A Look Inside the New VisitorView Dashboards

Sneak Peek!

What's next for VisitorView in 2025?

Coming Soon – Mode of Entry

Mode of Entry - Land, Air and Sea breakdown of trips

Coming Soon – Travel Diaries

Travel Diaries - Cross-visitation of destination pairs

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                                    ┌─────────────────┐
                                    │  25,000 Nights  │
                                    │   in Niagara    │
                                    │     Region      │
                                    └─────────────────┘
┌─────────────────┐                 ┌─────────────────┐
│ 100,000 Nights  │                 │  10,000 Nights  │
│   in Toronto    │─────────────────│   in Montreal   │
└─────────────────┘                 └─────────────────┘
                                    ┌─────────────────┐
                                    │ 5,000 Nights in │
                                    │   Ottawa and    │
                                    │   Countryside   │
                                    └─────────────────┘
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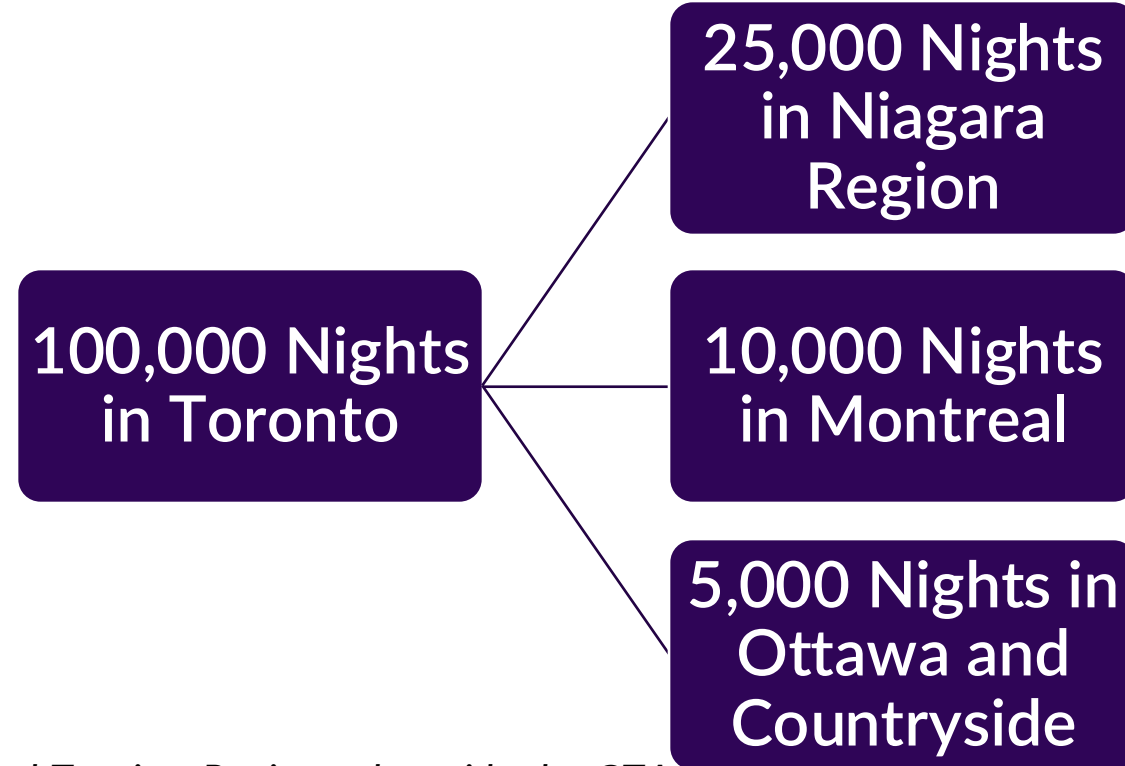
EXAMPLE ONLY: Top 5 most visited Tourism Regions alongside the GTA

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Coming Soon – Locations of Interest

Locations of Interest - DAs containing attractions

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VisitorView On the Ground

- Seasonality

- Shifting Traveller Sentiment

- Major Events Planning

VisitorView On the Ground

- Seasonality

Sun Peaks, BC has a strong Winter season.

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Winter visitors are upscale, with a mix of family, mature and young , they are heavily centered in urban areas.

Profile

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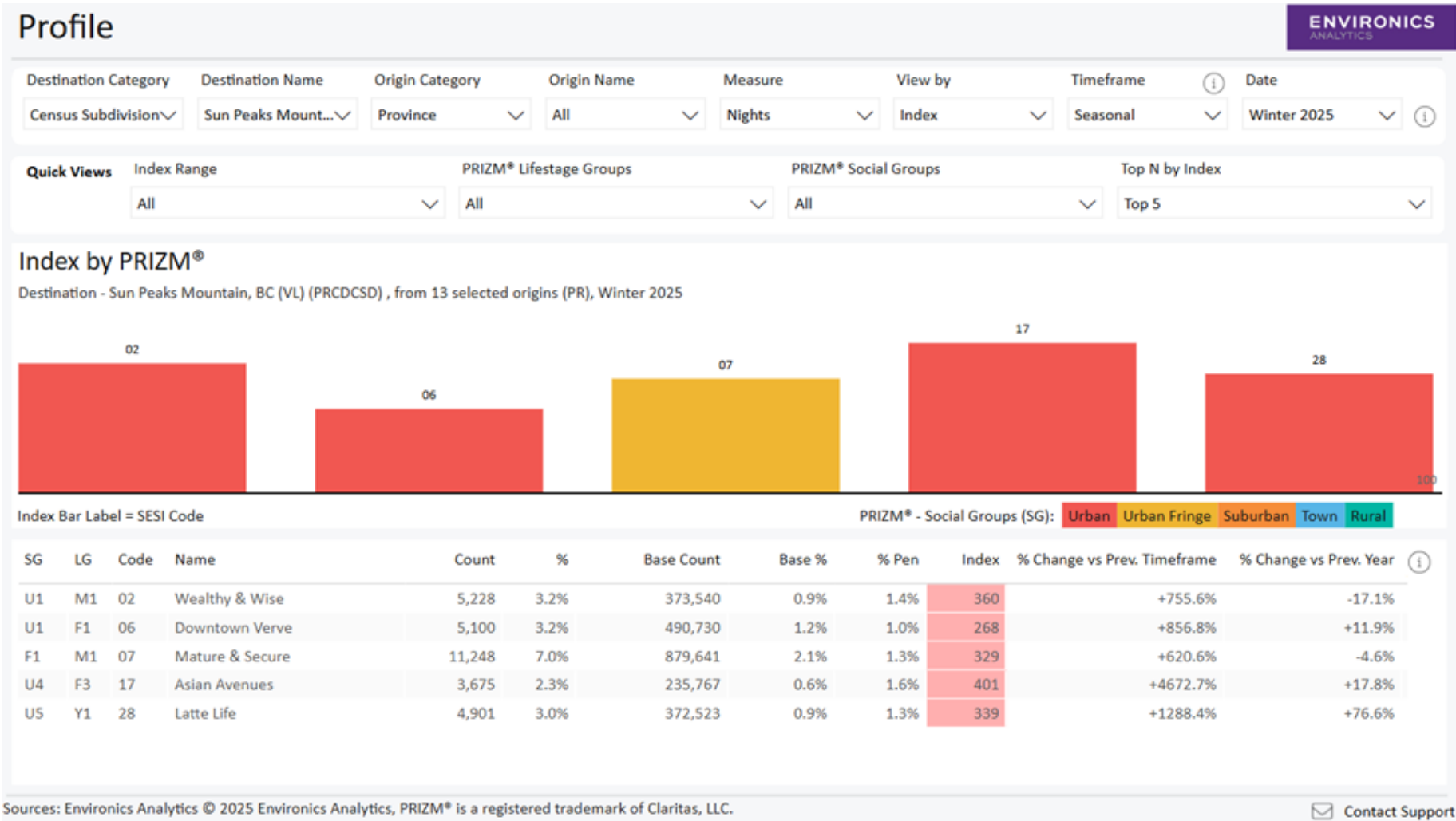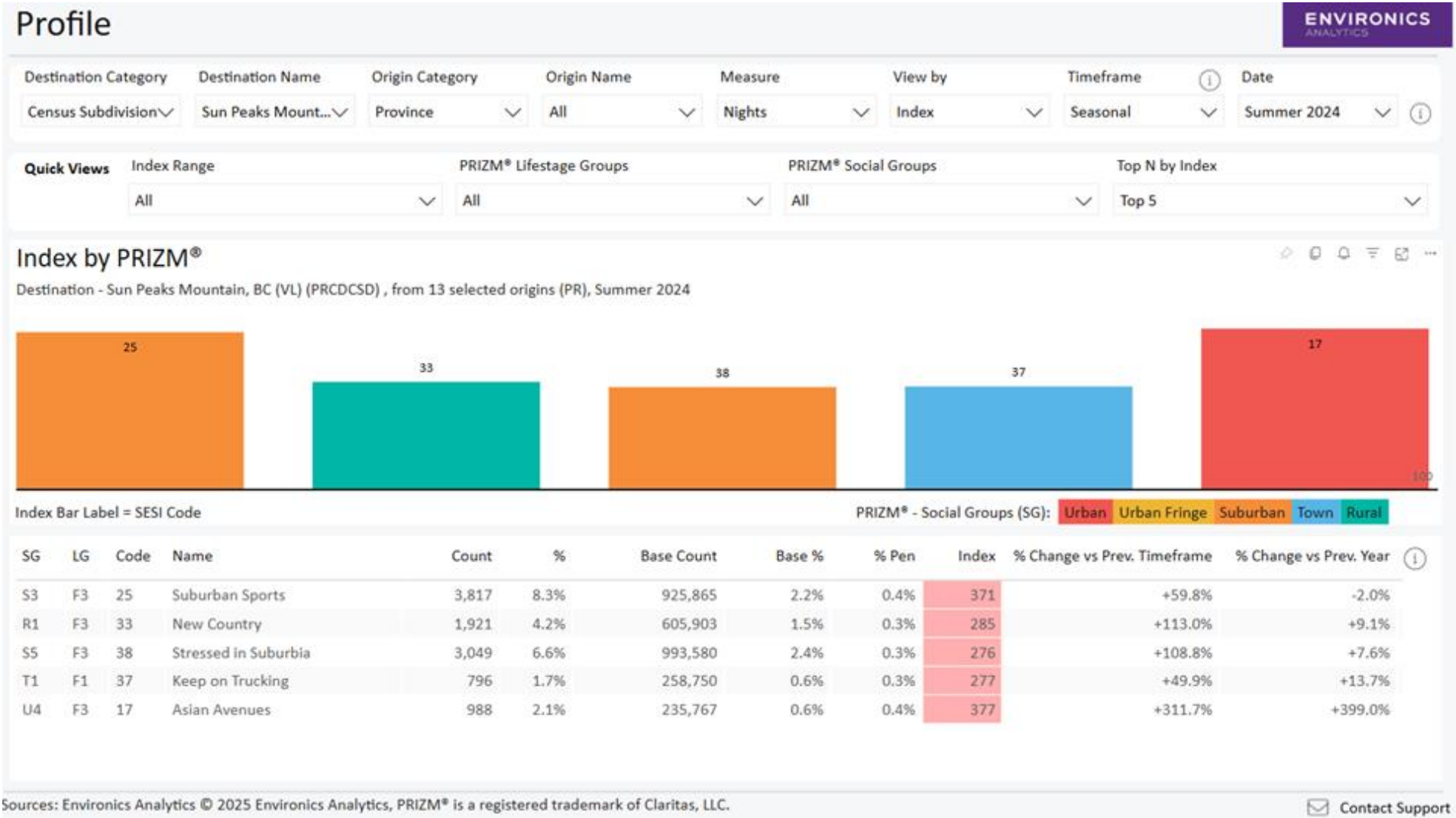| Destination Category	Destination Name	Origin Category	Origin Name	Measure	View by	Timeframe	Date
Census Subdivision	Sun Peaks Mount...	Province	All	Nights	Index	Seasonal	Winter 2025

Quick Views	Index Range	PRIZM® Lifestage Groups	PRIZM® Social Groups	Top N by Index
	All	All	All	Top 5

Index by PRIZM®

Destination - Sun Peaks Mountain, BC (VL) (PRCDCSD) , from 13 selected origins (PR), Winter 2025

Index Bar Label = SESI Code

PRIZM® - Social Groups (SG): Urban | Urban Fringe | Suburban | Town | Rural

SG	LG	Code	Name	Count	%	Base Count	Base %	% Pen	Index	% Change vs Prev. Timeframe	% Change vs Prev. Year
U1	M1	02	Wealthy & Wise	5,228	3.2%	373,540	0.9%	1.4%	360	+755.6%	-17.1%
U1	F1	06	Downtown Verve	5,100	3.2%	490,730	1.2%	1.0%	268	+856.8%	+11.9%
F1	M1	07	Mature & Secure	11,248	7.0%	879,641	2.1%	1.3%	329	+620.6%	-4.6%
U4	F3	17	Asian Avenues	3,675	2.3%	235,767	0.6%	1.6%	401	+4672.7%	+17.8%
U5	Y1	28	Latte Life	4,901	3.0%	372,523	0.9%	1.3%	339	+1288.4%	+76.6%

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Interestingly Summer visitors are more town and suburban middle-income families

Profile

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Destination Category	Destination Name	Origin Category	Origin Name	Measure	View by	Timeframe	Date
Census Subdivision ∨	Sun Peaks Mount... ∨	Province ∨	All ∨	Nights ∨	Index ∨	Seasonal ∨	Summer 2024 ∨

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PRIZM® - Social Groups (SG): Urban | Urban Fringe | Suburban | Town | Rural

SG	LG	Code	Name	Count	%	Base Count	Base %	% Pen	Index	% Change vs Prev. Timeframe	% Change vs Prev. Year
S3	F3	25	Suburban Sports	3,817	8.3%	925,865	2.2%	0.4%	371	+59.8%	-2.0%
R1	F3	33	New Country	1,921	4.2%	605,903	1.5%	0.3%	285	+113.0%	+9.1%
S5	F3	38	Stressed in Suburbia	3,049	6.6%	993,580	2.4%	0.3%	276	+108.8%	+7.6%
T1	F1	37	Keep on Trucking	796	1.7%	258,750	0.6%	0.3%	277	+49.9%	+13.7%
U4	F3	17	Asian Avenues	988	2.1%	235,767	0.6%	0.4%	377	+311.7%	+399.0%

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Strategic Implications

Marketing

- How can you segment audience by season to better target their needs?

- What incentives can attract diverse traveler groups?

- How can you align marketing with traveler behavior and social values

Destination Development

- What investments are needed to enhance summer infrastructure?

- How can we improve transport options for visitors?

- Are businesses open year-round?

Engagement

- Are these the types of visitors you want to attract? Do our visitors share values with residents?

- How can we use visitor insights to boost community sentiment?

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VisitorView On the Ground

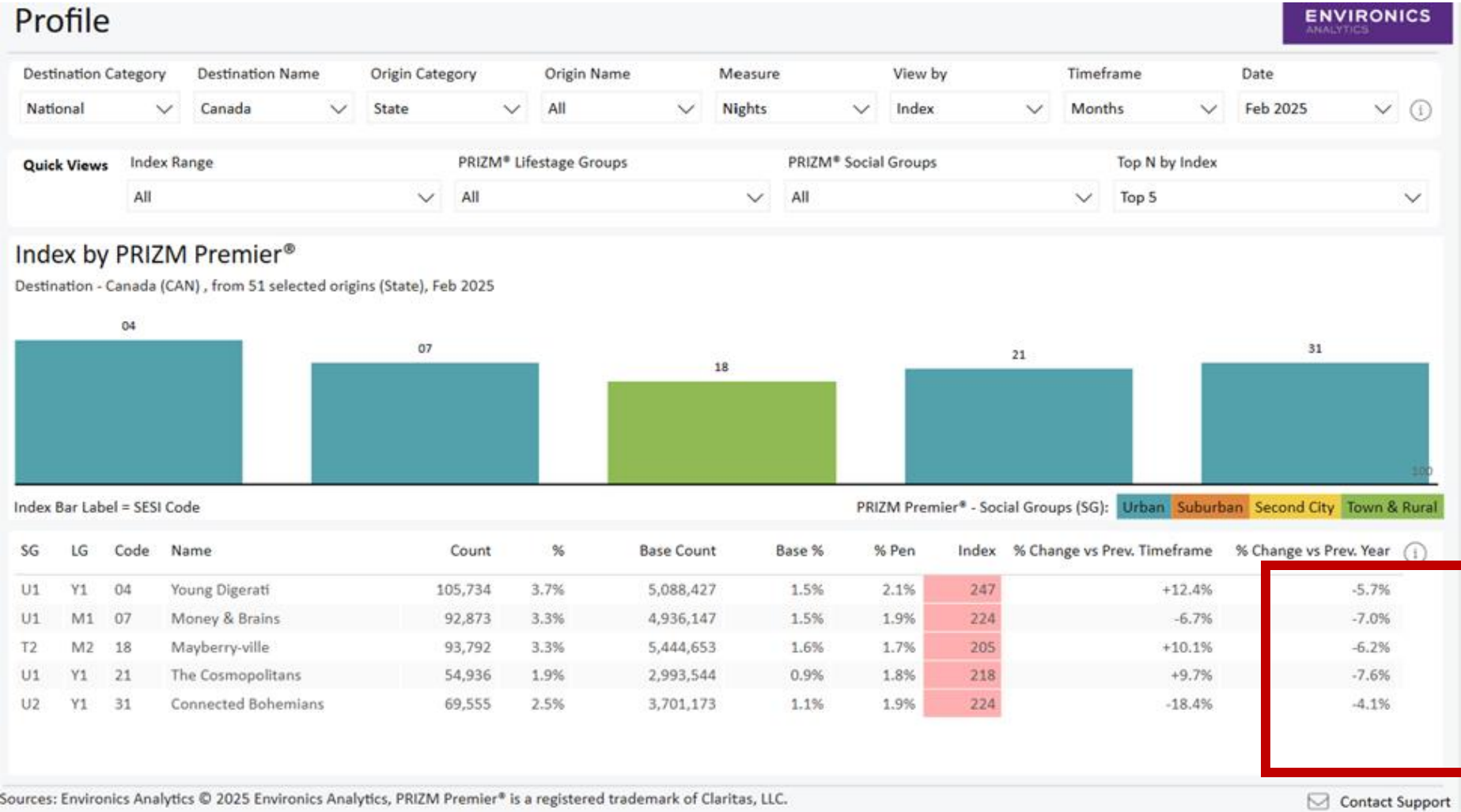- Shifting visitation sentiments

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There is some YOY softness, especially on the international tourism front, with a 20% decline in February and March nights
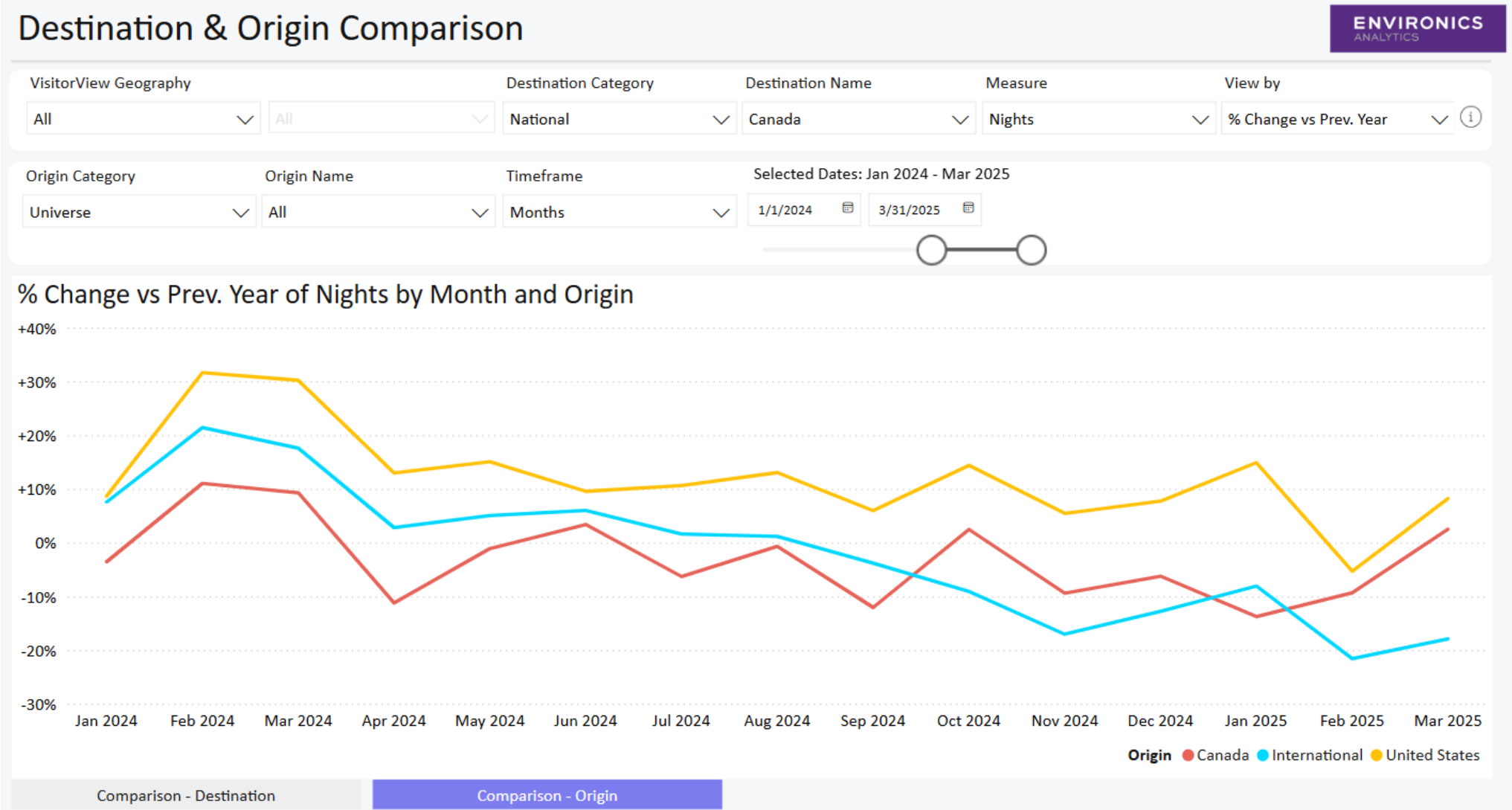
The top 10 States show similar trends with a drop in February but show a rebound in March.
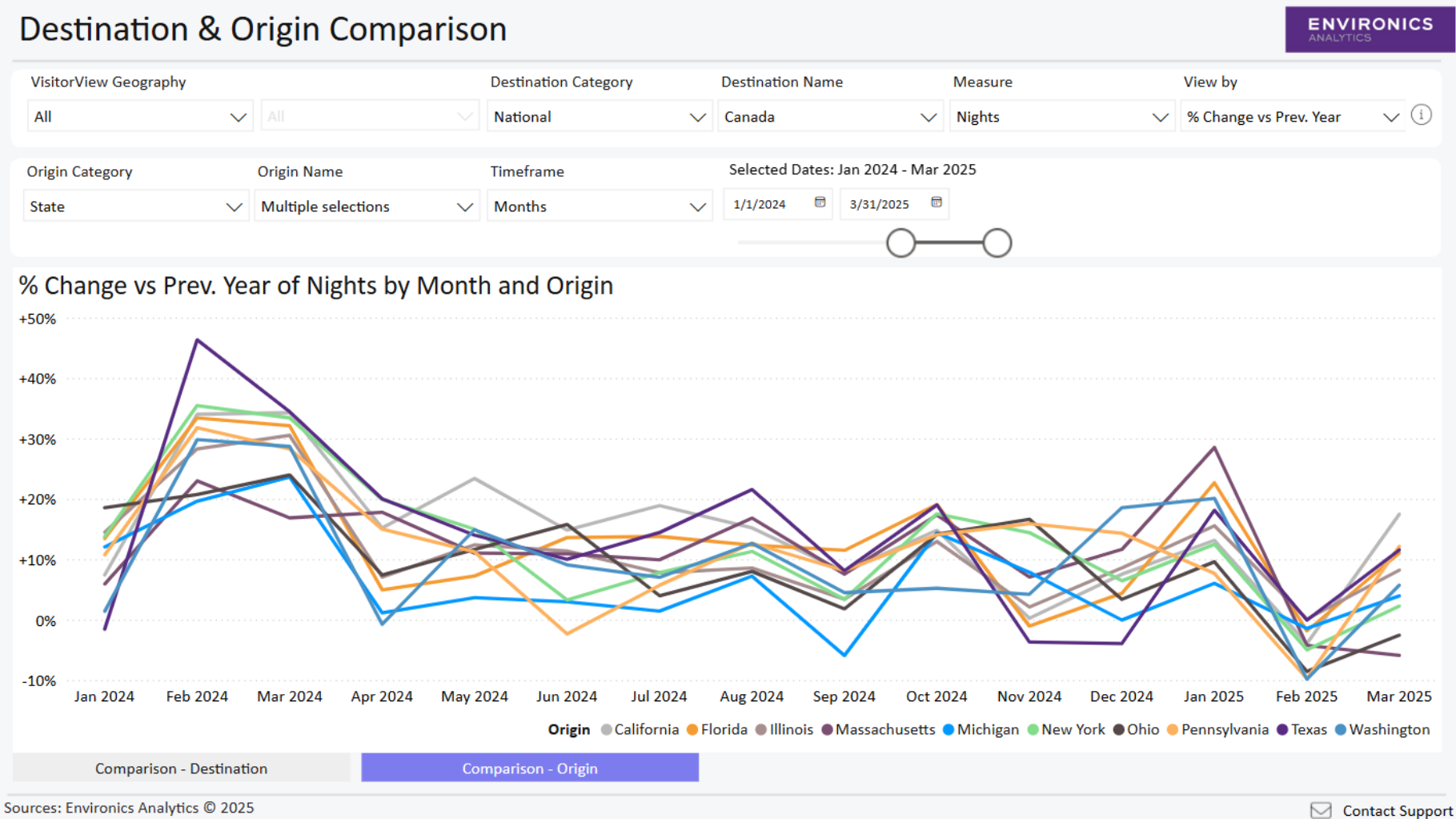
Even top visitor types to Canada are showing a YOY decline

Profile

Destination Category	Destination Name	Origin Category	Origin Name	Measure	View by	Timeframe	Date
National	Canada	State	All	Nights	Index	Months	Feb 2025

Quick Views	Index Range	PRIZM® Lifestage Groups	PRIZM® Social Groups	Top N by Index
	All	All	All	Top 5

Index by PRIZM Premier®

Destination - Canada (CAN) , from 51 selected origins (State), Feb 2025

Index Bar Label = SESI Code

PRIZM Premier® - Social Groups (SG): Urban Suburban Second City Town & Rural

SG	LG	Code	Name	Count	%	Base Count	Base %	% Pen	Index	% Change vs Prev. Timeframe	% Change vs Prev. Year
U1	Y1	04	Young Digerati	105,734	3.7%	5,088,427	1.5%	2.1%	247	+12.4%	-5.7%
U1	M1	07	Money & Brains	92,873	3.3%	4,936,147	1.5%	1.9%	224	-6.7%	-7.0%
T2	M2	18	Mayberry-ville	93,792	3.3%	5,444,653	1.6%	1.7%	205	+10.1%	-6.2%
U1	Y1	21	The Cosmopolitans	54,936	1.9%	2,993,544	0.9%	1.8%	218	+9.7%	-7.6%
U2	Y1	31	Connected Bohemians	69,555	2.5%	3,701,173	1.1%	1.9%	224	-18.4%	-4.1%

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Strategic Implications

- Do you want to prioritize attracting more Canadian visitors? What unique opportunities or challenges does the in the current situation present?

- Is maintaining your current U.S. market share a priority? What trends or shifts might influence this decision?

- Is your destination prepared to welcome a new or different visitor profile? What infrastructure, services, or messaging might need to evolve?

- Do American visitors feel genuinely welcomed in our community? How do local perceptions and cultural alignment influence this, should you be concern?

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VisitorView On the Ground

- Major Events Planning

Americans spent 100K more nights in Tayronto in November 2024!
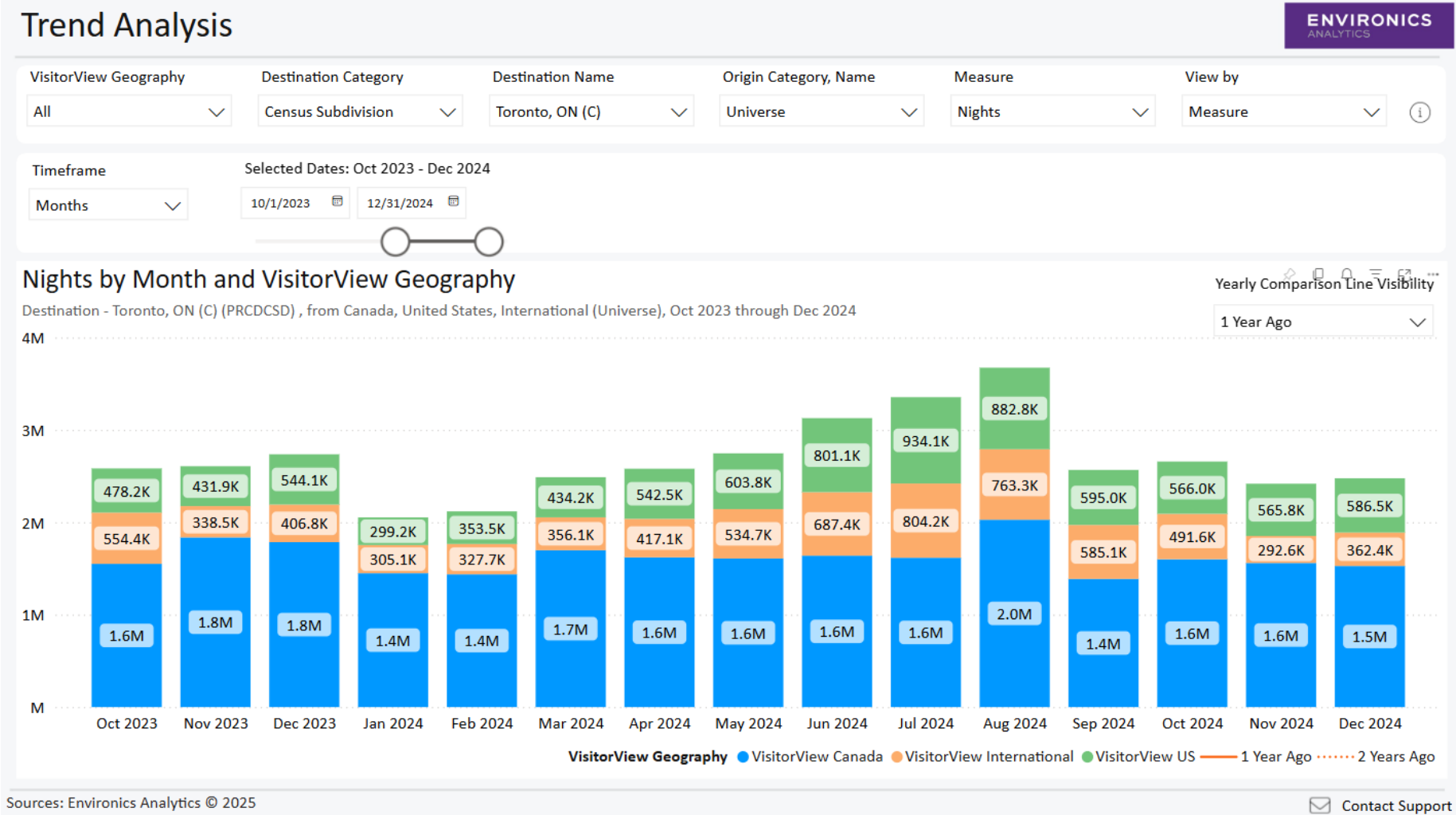
Suburban and Rural families shied away from Tayronto in November 2024 with a double-digit drop in YOY nights to the city
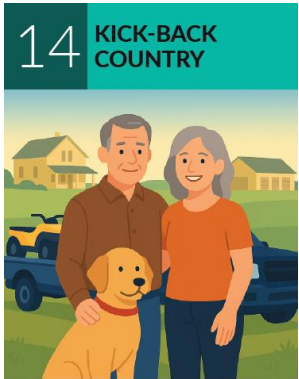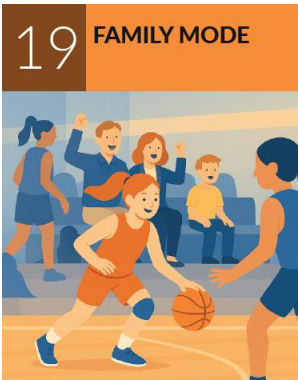

14 KICK-BACK COUNTRY

R1 Upper-Middle Rural — Middle-Age Families F3

Rural, middle-aged and older couples and families

-14.4%
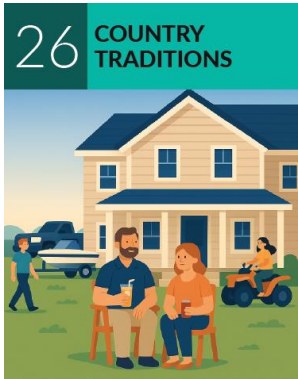
26 COUNTRY TRADITIONS

R1 Upper-Middle Rural — Middle-Age Families F3
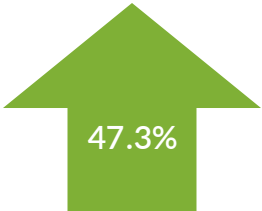
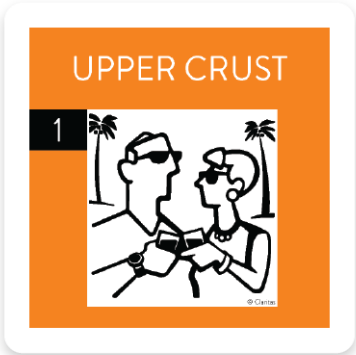Rural, upper-middle-income couples and families

-17.2%
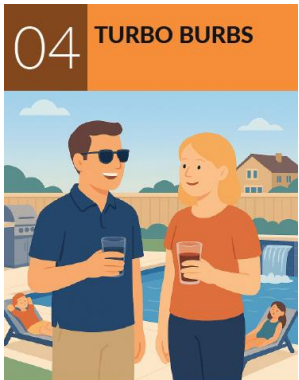
04 TURBO BURBS

S1 Suburban Elite — Middle-Age Families F3

High-income, middle-aged, suburban families and couples

-6.4%

19 FAMILY MODE

S3 Upper-Middle Suburbia — Middle-Age Families F3

Suburban, financially comfortable, middle-aged families
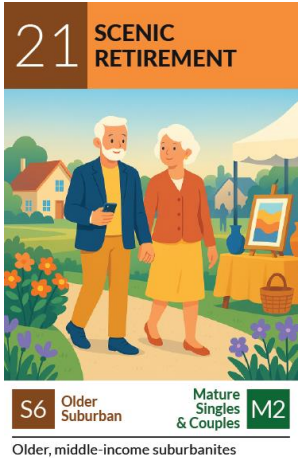
-12.9%

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The types of visitors differed as well, with more affluent US visitors heading to Tayronto

UPPER CRUST
1
53.7%

URBAN MODERN MIX
45
37.9%

WINNER'S CIRCLE
6
43.6%

LOW-RISE LIVING
63
47.3%

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Swiftcouver saw an uptick in both domestic and US visitors in December 2024; 5.5% and 31.5% respectively

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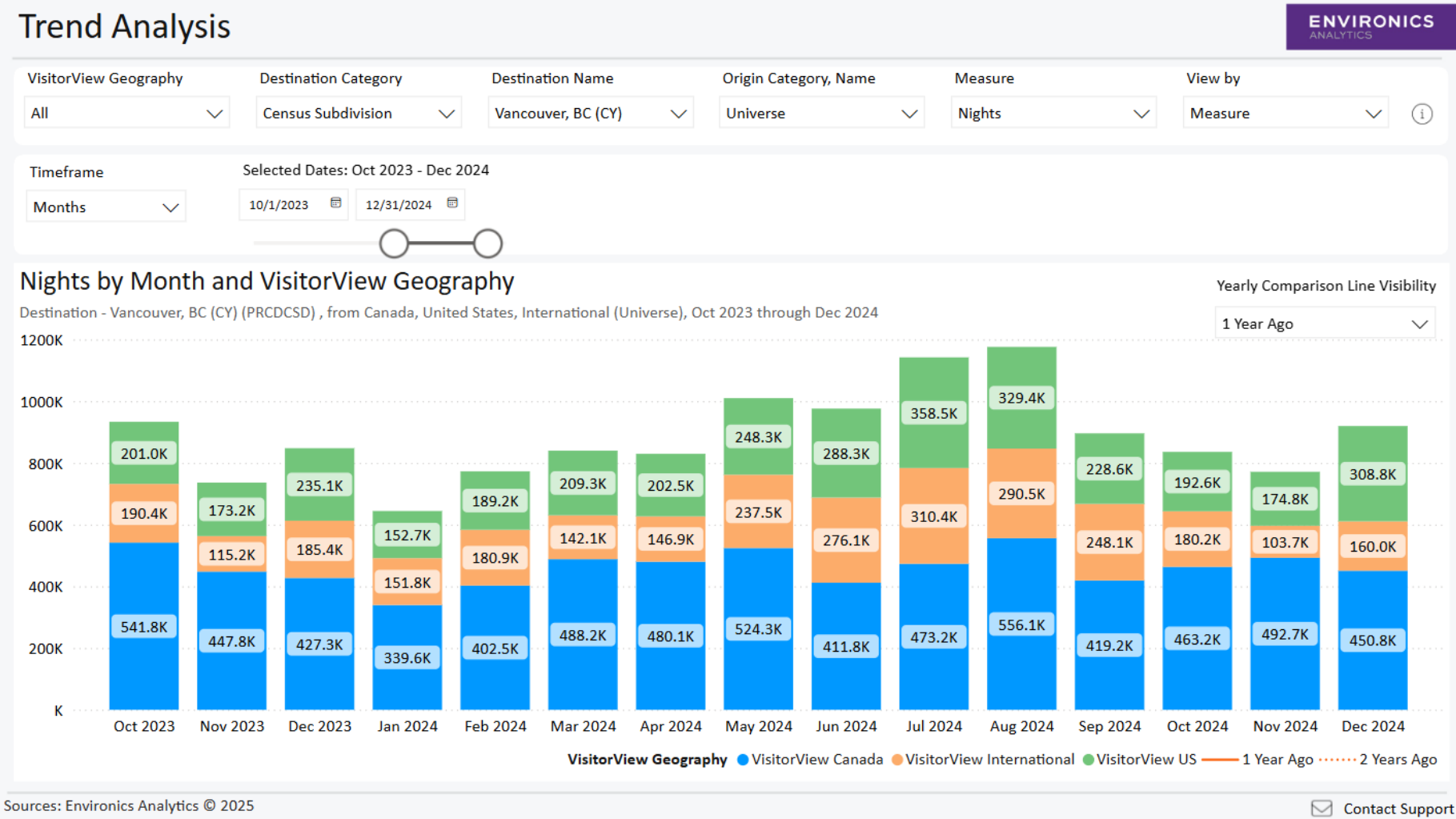
Domestically, there are some typical visitor types who stayed away during this major event, primarily younger families

25 SUBURBAN SPORTS

S3 Upper-Middle Suburbia — Middle-Age Families F3

Upper-middle income, younger and middle-aged suburbanites

-14.8%

38 STRESSED IN SUBURBIA

S5 Middle-Income Suburbia — Middle-Age Families F3

Middle-income, younger and middle-aged, suburban families

-1.4%

21 SCENIC RETIREMENT

S6 Older Suburban — Mature Singles & Couples M2

Older, middle-income suburbanites

-8.1%

19 FAMILY MODE

S3 Upper-Middle Suburbia — Middle-Age Families F3

Suburban, financially comfortable, middle-aged families

-1.4%

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While Tayronto saw an influx of new visitor types, Swiftcouver welcomed familiar faces from our American neighbours

CONNECTED BOHEMIANS
31
6.2%

MONEY & BRAINS
7
0.4%

YOUNG DIGERATI
4
3.7%

THE COSMOPOLITANS
21
-0.1%

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Strategic Implications

New Visitor Types:

- How do I embrace these new visitors to my region?

- With new visitor profiles coming, how can I encourage them to visit our attractions and not just event-related activities?

- Knowing there are new visitor types coming to a major event, how do I, as an adjacent DMO encourage disbursement to my area?

Familiar Faces:

- Recognizing familiar faces are opting out of big events, how can I encourage them to come another time?

- As a DMO at a distance from the major event location, how do I attract the familiar faces to visit here instead?

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Thank You

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