TourismScapes User Guide

Version 1.0: March 6, 2024

Three Isle Lake

Alberta

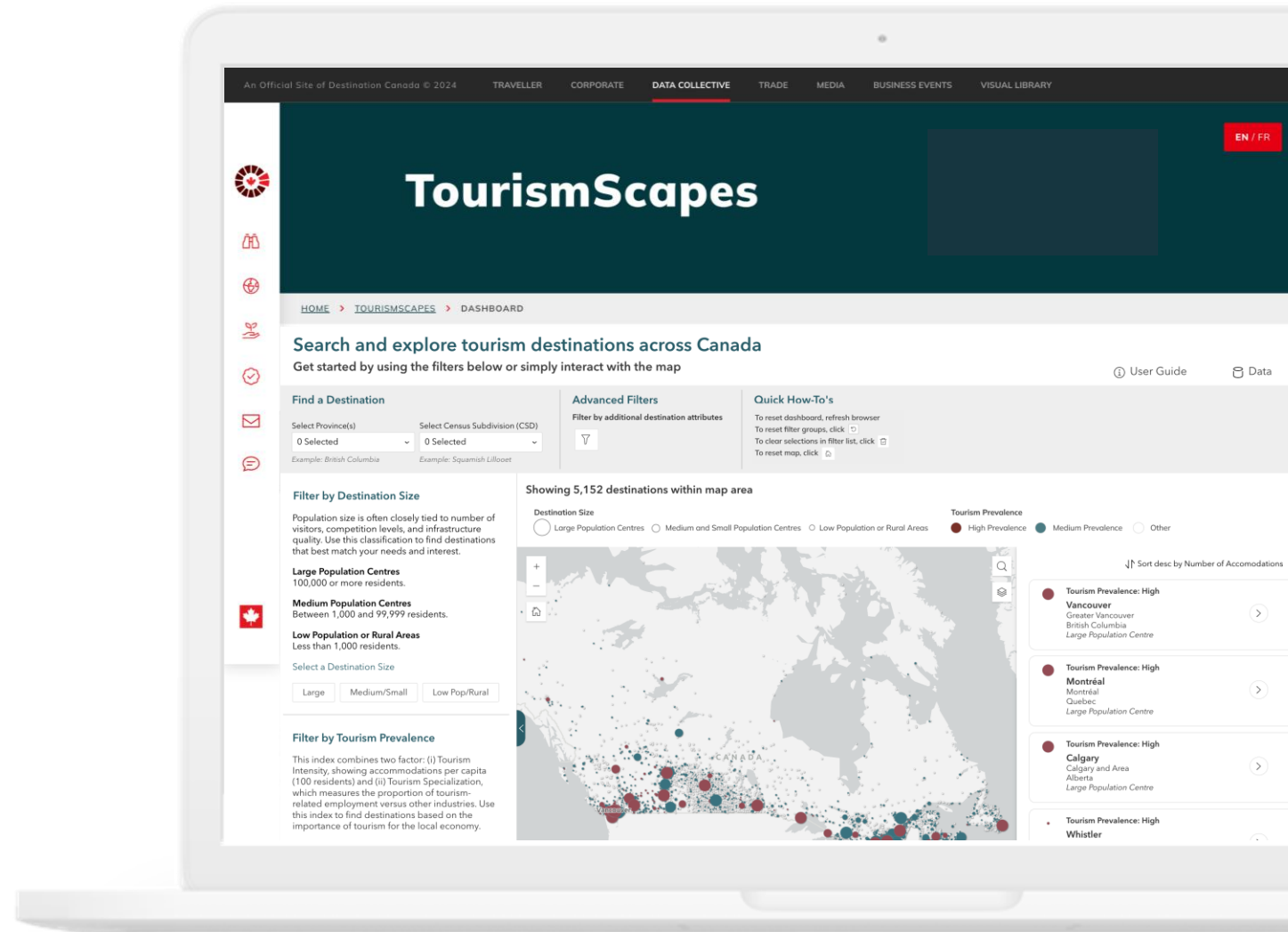# Table of Contents

What you can find in this document

Wedgemount Lake

British Columbia

What is TourismScapes?

TourismScapes is an interactive dashboard built from spatial data layers that provides self-service market intelligence at a community level (Census subdivision) to support destination development and investment.

This document is intend to provide:

- An overview of the components and how to navigate the dashboard

- Examples of insights users can generate

Dashboard features at-a-glance

Search and explore page

A — Helpful resources
- Click 'User Guide' to view user guide
- Click 'Data' to learn about metrics and data sources

B — Filter panel
- Filter the dashboard using the selections offered in the drop-down menus
- Learn how to reset filters in 'Quick How-to's'

C — Reference panel
- Understand and filter by Destination Size and Tourism Prevalence – see Page 13 for methodology
- Hide / unhide this panel using the arrow tab

D — Cluster map
- View number of destinations and typology
- Data can also be filtered using this map

E — Destination listing
- Sortable list of destinations within the map area
- Click the arrow to view more information about the destination

Dashboard features at-a-glance

Destination profile page
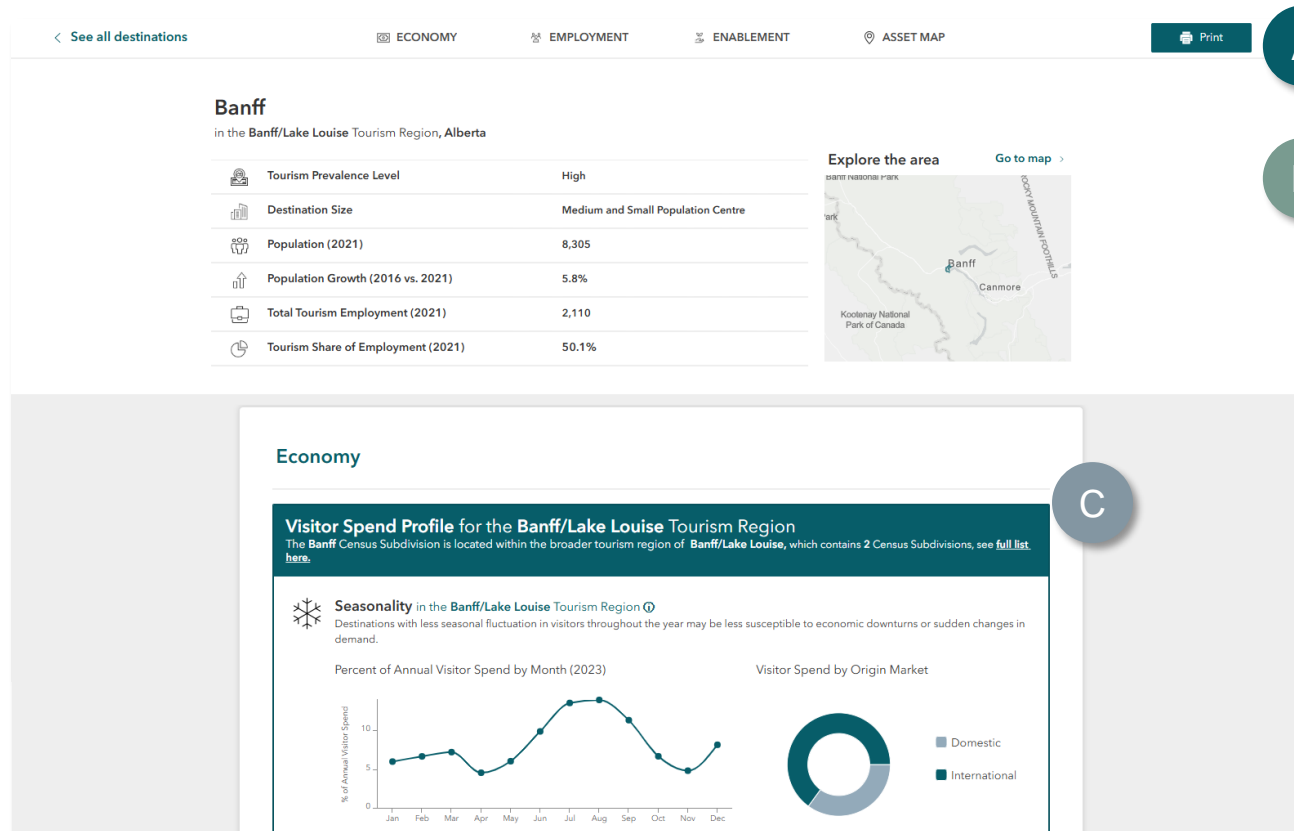
A Dashboard page navigation
- Click 'See all destinations' to go back to search and explore page
- Use links to jump to a dashboard section

B Profile summary
- View high-level key information for a destination
- Click 'Go to map' to jump to Asset Map section

C Dashboard sections
View dashboard sections and visualizations for a destination:
- Economy
- Employment
- Enablement
- Asset Map

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Understand the Industry Investor persona and their dashboard needs and goals

Persona *Who am I?*	As a **boutique hotel franchisor**…
Goal *What am I trying to achieve?*	in order to **better understand a community's existing supply base** and **potential demand in a market**, as well factors like **population, transportation access and talent pool**…
Key activity *How do I do this?*	I need to **run a high-level assessment to identify and compare markets** based on criteria that align with my investment goals.

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As a boutique hotel franchisor, I am looking for potential investment opportunities in a small-town destination with ~~low seasonality~~ high population growth and near a designated park or heritage site in the province of my selection …

How to use the **Search and Explore Page**…

Search and explore tourism destinations across Canada
Get started by using the filters below or simply interact with the map
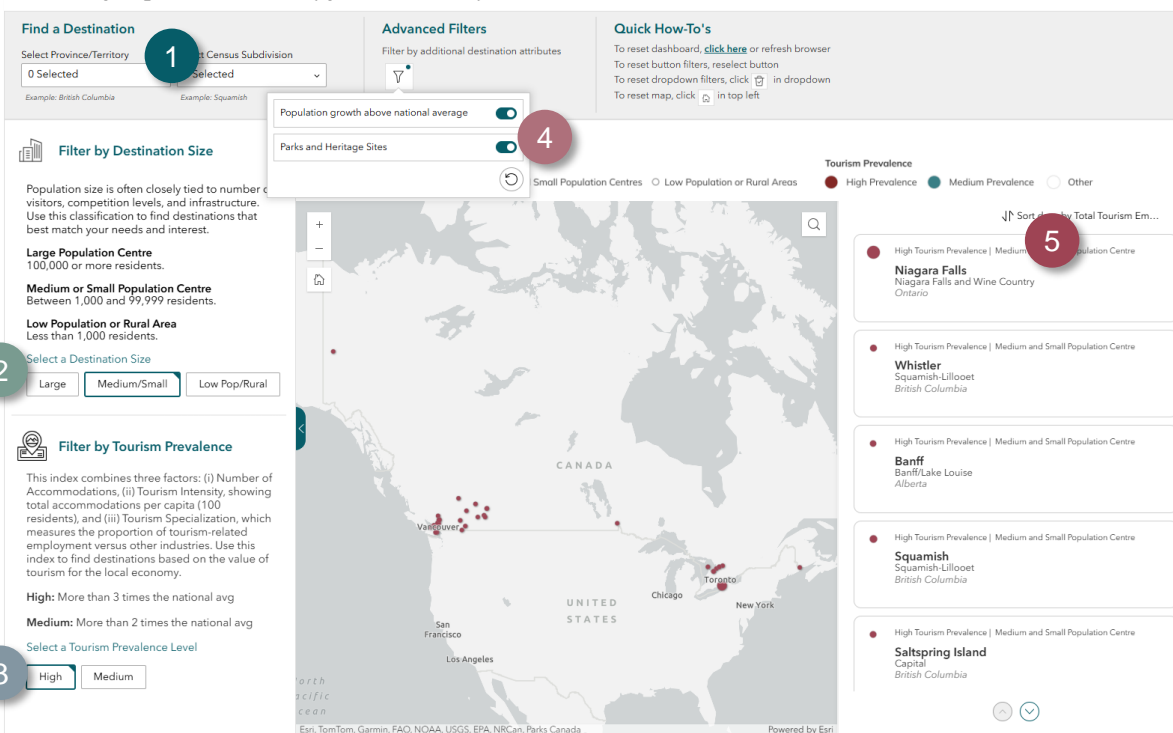
ⓘ User Guide   🗐 Data

Find a Destination

Select Province/Territory
| 0 Selected |

Select Census Subdivision
| Selected |

Example: British Columbia   Example: Squamish

Advanced Filters
Filter by additional destination attributes

🔽•

Population growth above national average ⬤
Parks and Heritage Sites ⬤
↺

Quick How-To's
To reset dashboard, **click here** or refresh browser
To reset button filters, reselect button
To reset dropdown filters, click 🗑 in dropdown
To reset map, click ⌂ in top left

Filter by Destination Size

Population size is often closely tied to number of visitors, competition levels, and infrastructure. Use this classification to find destinations that best match your needs and interest.

Large Population Centre
100,000 or more residents.

Medium or Small Population Centre
Between 1,000 and 99,999 residents.

Low Population or Rural Area
Less than 1,000 residents.

Select a Destination Size
| Large | Medium/Small | Low Pop/Rural |

Filter by Tourism Prevalence

This index combines three factors: (i) Number of Accommodations, (ii) Tourism Intensity, showing total accommodations per capita (100 residents), and (iii) Tourism Specialization, which measures the proportion of tourism-related employment versus other industries. Use this index to find destinations based on the value of tourism for the local economy.

High: More than 3 times the national avg

Medium: More than 2 times the national avg

Select a Tourism Prevalence Level
| High | Medium |

Small Population Centres ⦿ Low Population or Rural Areas

Tourism Prevalence
⬤ High Prevalence   ⬤ Medium Prevalence   ○ Other

Sort by Total Tourism Em…

High Tourism Prevalence | Medium…
Niagara Falls
Niagara Falls and Wine Country
Ontario

High Tourism Prevalence | Medium and Small Population Centre
Whistler
Squamish-Lillooet
British Columbia

High Tourism Prevalence | Medium and Small Population Centre
Banff
Banff/Lake Louise
Alberta

High Tourism Prevalence | Medium and Small Population Centre
Squamish
Squamish-Lillooet
British Columbia

High Tourism Prevalence | Medium and Small Population Centre
Saltspring Island
Capital
British Columbia

Esri, TomTom, Garmin, FAO, NOAA, USGS, EPA, NRCan, Parks Canada   Powered by Esri

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① **Select province under the filter drop-down**

② **Filter by Destination Size:**
☐ Large Population Centres
☒ Medium/small Population Centres
☐ Low Population or Rural Areas

> I'm interested in starting my boutique hotel in a **smaller market**

③ **Filter by Tourism Prevalence**
☒ High Tourism Prevalence
☐ Medium Tourism Prevalence
☐ Other

> I'm interested in a location that has **high tourism prevalence** and existing visitor base

④ **Drill down results further through Advanced filters:**
☒ Population growth above national average
☒ Parks and Heritage Sites

> I'm interested in areas with **population growth above the national average** that have **Parks and Heritage Sites** as I start my business.

⑤ **Select a destination from the list to view profile**

Insights and Scenario Example: Industry Investor

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As a boutique hotel franchisor, once I've identified a potential destination opportunity, I need to understand and assess the destination's existing supply base and potential demand, as well factors like population, transportation access and employment availability

How to use the **Search and Explore Page**…

1 Economy

This section covers two main topics:

a) **Visitor Spending:** It shows how visitors contribute to the economy of the broader tourism region, including whether they're primarily domestic or international, and how spending fluctuates seasonally.

b) **Business Landscape:** Provides an overview of the tourism businesses and other dominant sectors in the destination.

2 Employment

This section explores **tourism-related employment**, including the share of tourism employment within the local economy, total tourism employment, and Indigenous and immigrant representation within the tourism sector.

3 Enablement

This section provides insights on the existing **accommodation infrastructure** within the destination, including hotel rooms and short-term rentals, as well as factors such as **geographic accessibility** and **cost of living.**

4 Asset Map

Use the Asset Map to discover **parks and heritage sites, cultural and art facilities, Indigenous tourism businesses (ITAC), past federal investments in tourism**, and other relevant infrastructure such as **educational facilities** and **airports.**

Understand the Destination Steward persona and their dashboard needs and goals

	Persona *Who am I?*	As a **Director of Tourism and Community Development for a municipality…**
	Goal *What am I trying to achieve?*	in order to **support the development of my community's tourism strategic plan,**
	Key activity *How do I do this?*	I need to **perform a situational analysis** to highlight the value within my community.

Insights and Scenario Example: Destination Steward

As a Director of Tourism and Community Development for a municipality, I am looking to understand and assess the value of tourism in my community…

How to use the **Search and Explore Page**…

**1** Enter community name in search bar

2 Click arrow to view community profile

Tourism Prevalence: Medium
Sault Ste. Marie
North-Central Ontario
Ontario
Medium and Small Population Centre

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🏛 **As a Director of Tourism and Community Development for a municipality, I am looking to understand and assess the value of tourism in my community…**

How to use the **Destination Profile Page**… *Example insights for Sault Ste. Marie*
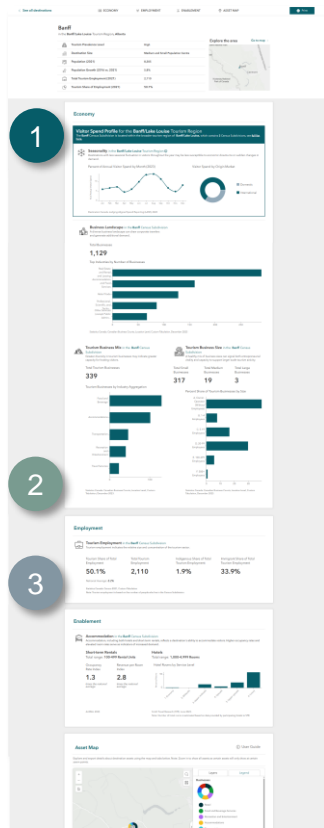
Sault Ste. Marie is located in the **North-Central Ontario tourism region**, where visitor spend occurs mostly between **July and September**.

Sault Ste. Marie has a **high share of tourism employment relative to the national average - employing over 2,900 people**, with over **9% of tourism employees identifying as Indigenous**.
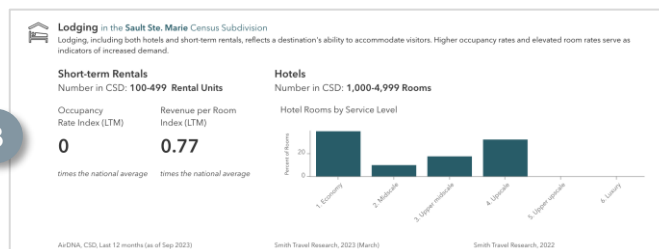
The majority of hotel rooms by service level in Sault Ste. Marie are economy, followed by upscale.

APPENDIX

DESTINATION CANADA   CANADIAN TOURISM DATA **collective**

Tourism Prevalence Index was developed to help identify destinations based on the value of tourism for the local economy.

What factors are considered to calculate the Tourism Prevalence Index?

This index combines **three factors** to assess the significance of tourism for a local economy, is calculated at the Census subdivision level (CSD).

Factor 1: Total Accommodations, which includes both hotel rooms and short-term rental listings.

$$\text{Total Accomodation} = \text{Number of Hotel Rooms} + \text{Number of Short Term Rentals}$$

Factor 2: Tourism Intensity, which considers the number of accommodations per capita (100 residents).

$$\text{Tourism Intensity} = \frac{\text{Total Accomodation}}{\text{Population in 2021}} X\ 100$$

Factor 3: Tourism Specialization, which measures the proportion of employment in the tourism industry compared to other industries – also known as the Location Quotient.

$$\text{Tourism Specialization} = \text{Location Quotient}$$

KEY TERMS

Census subdivision (CSD) is the general term for municipalities (as determined by provincial/territorial legislation) or areas treated as municipal equivalents for statistical purposes (e.g., Indian reserves, Indian settlements and unorganized territories).

Location Quotient: The location quotient (LQ) measures the concentration of tourism employment in a region relative to the national average. A LQ greater than one means that the concentration of tourism employment is greater than the national average. Nationally, the maximum LQ is 9.16 , the minimum LQ is 0 .

DATA SOURCES

Number of Rooms (STR. AM:PM Database, 2022)
Number of Short-term Rentals (AirDNA, 2022)
Population (Census. Statistics Canada, 2021)
Tourism Employment (Census. Statistics Canada, 2021)

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Tourism Prevalence index was developed to help identify destinations based on the value of tourism for the local economy.

How is the Tourism Prevalence Index Calculated?

To create the index, the 3 variables are first normalized and combined using equal weighting.

$$Tourism\ Prevalence =$$

$$\frac{Total\ Accomodation\ normalized +\ Tourism\ Intensity\ normalized + Tourism\ Specialization\ normalized}{3}$$

Using the output of the above calculation destinations are then assigned as High or Medium Tourism Prevalence Index using the following rules:

High: Destination's Tourism Prevalence Index is **3x the National Average**

Medium: Destination's Tourism Prevalence Index is **2x the National Average**

All remaining destinations are classified as "Other"

KEY TERMS

Normalization: The term "normalization" refers to the scaling down of the data points such that the normalized data falls between 0 and 1. This normalization technique helps compare corresponding normalized values from two or more data point by making sure they on the same scale.

Normalization Formula

$$X_{normalized} = \frac{X - X_{min}}{X_{min} - X_{max}}$$