SYMPHONY
TOURISM
SERVICES
INSPIRED NAVIGATION

MOBILESCAPES RESEARCH INSIGHTS

March 2021

Alert Bay Visitor Analysis

BRITISH COLUMBIA & ALBERTA VISITOR ANALYSIS

ABOUT SYMPHONY

Kelly Galaski
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- Symphony Tourism Services is a consulting company created as a resource to support the tourism industry in the Thompson Okanagan region and across British Columbia regions of the BC Regional Tourism Secretariat. STS is a subsidiary of the Thompson Okanagan Tourism Association (TOTA).

Shelby Campbell
Research Specialist

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- STS currently supplies research, marketing, consulting and project management services ranging from economic development and tourism development consulting, custom visitor and market research, and digital marketing campaign development and execution.

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AGENDA

OBJECTIVES

- Understand your visitors: Who are they, where are they coming from? What are their interests? Where do they get their information? And where are more of them that we can market to?

- Utilize research results derived from MobileScapes Mobile Movement analysis to support strategy direction, target marketing and COVID-19 Recovery planning

INTRODUCTION

- This Visitor Analysis profiles Mobile Movement Data for key locations within Alert Bay as they relate to Destination Canada's Explorer Quotient Traveller Types and Environics Analytics 2020 PRIZM5 Market Segmentation profiles

- Through this project we aim to answer the above questions, identify similarities/differences in visitor profiles, and ultimately provide you with insights to aid in reaching your marketing goals

ABOUT ENVIRONICS ANALYTICS & PRIZM

Environics Analytics is one of North America's leading data analytics and marketing services companies.

PRIZM provides insights into more than 30,000 variables including demographics, consumer preferences, lifestyles and values tied to postal codes. There are 67 PRIZM Clusters in Canada.

Environics Analytics Research provides a deeper understanding of customers and markets through geographic analysis and customized segmentation.

ABOUT EQ

- [Explorer Quotient](#), also known as EQ, was developed by Destination Canada in partnership with Environics Analytics.

- EQ is a proprietary market segmentation system based on the science of psychographics; developed to provide tourism businesses with insights into why and how people like to travel

- EQ goes beyond traditional market research of defining people. It looks deeper at views of the world to learn exactly why different types of travellers seek out entirely different travel experiences.

DESTINATION CANADA EQ RESOURCES

- [EQ TOOLKIT](#)

- [EQ PROFILES](#)

EQ Explorer Quotient | QE Quotient explorateur

ABOUT MOBILESCAPES

What is MobileScapes?

- Combines data collected from mobile devices with location enabled tracking on various Apps

- Identifies devices observed within a defined area:
  - e.g Trail head, public square or a winery for a given date and time range
  - 110 acres (Non contiguous)

- The amount of anonymized, permission based data captured is dependent upon:
  - Device being ON
  - Device has Apps allowing location tracking
  - There is a WIFI or Cell tower within the geo-fenced area for the device to ping

- The devices then become a sample of the visitors to the area (just like a sample of people answering a survey)

- The Sample is then reviewed for visitor origin postal codes, extrapolated and then averaged using a number of external data sources used by Environics Analytics to weight and validate the data

Why MobileScapes?

- Identify Visitor Movement Patterns
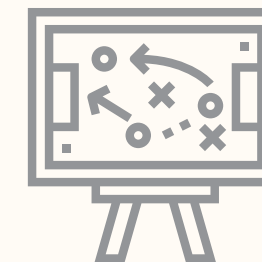- Identify Visitation trends by Date, Time of day and Location

Identify **WHO** visits your location, **WHAT** they like (Activities/Media Habits) and **WHERE** more people like them are

Understand your Visitors

Identify Top Markets

Execute your Strategy

HOW TO USE MOBILESCAPES
HOW CAN THESE INSIGHTS HELP YOU?

Identify Patterns	Develop Profiles	Product Development & Campaigns
• Use Visitor Volume estimates to identify fluctuations/changes in visitation by month/season/year • COVID-19 Patterns	• Visitor Profiles developed to help you understand your visitors ○ Demographics ○ Psychographics ○ Life Stage/Family Size ○ Income Level ○ Media Habits ○ Activities/Interests	• Use your Visitor Insights to create new products or Itineraries • Tailor existing products/services to existing customers • Identify New Target Markets or expand your reach • Target Digital or Traditional Media Campaigns based on geography, media habits, social values, activities etc.

DATA ANALYZED

- **MobileScapes** is an anonymized, permission-based data service, which uses data collected from location-enabled mobile devices.

- The main sources of data are **opt-in location-enabled applications** on mobile devices and ad exchange platforms.

- At present, there are approximately **100,000 mobile applications** that contribute data to Environics Analytics' MobileScapes services.

Alert Bay - 2019

Sample of **7,200** visitors analyzed from British Columbia

Sample of **200** visitors analyzed from Alberta

Alert Bay - 2020

Sample of **7,000** visitors analyzed from British Columbia

Sample of **200** visitors analyzed from Alberta

Alert Bay - 2019

Sample of **4,900** visitors analyzed from British Columbia

  * *Local Residents from Alert Bay removed from Sample*

Alert Bay - 2020

Sample of **4,800** visitors analyzed from British Columbia

  * *Local Residents from Alert Bay removed from Sample*

VISITOR ORIGIN

PROVINCIAL BREAKDOWN
2019 VISITORS

- On average **94%** of visitors to the 3 geo-coded Alert Bay areas in 2019 were from British Columbia, **3%** from Alberta and **2%** from Ontario

- This report will focus on the **British Columbia Market**, followed by the **Alberta Market**

Note: When Alert Bay was removed from the analysis, BC made up **91%** and Alberta **4%** of 2019 visitors

YT
0.3%

NT
0.1%

NU
0%

BC
94%

AB
3%

SK
0%

MB
1%

ON
2%

QC
0%

NL
0%

PEI
0%

NB
0%

NS
1%

PROVINCIAL BREAKDOWN
2020 VISITORS

- On average **96%** of visitors to the 3 geo-coded Alert Bay areas in 2019 were from British Columbia and **2%** from Alberta. There was minimal visitation from all other Provinces.

- This report will focus on the **British Columbia Market**, followed by the **Alberta Market**

Note: When Alert Bay was removed from the analysis, BC made up **95%** and Alberta **3%** of 2020 visitors

YT
0%

NT
0%

NU
0%

NL
0%

BC
96%

AB
2%

MB
0.3%

QC
1%

SK
0.1%

ON
0.1%

PEI
0%

NB
0%

NS
0%

VISITOR ORIGIN BY CITY
BRITISH COLUMBIA

Key Findings

- Campbell River and Nanaimo ranked as the top visitor origin locations in 2019 and 2020 for the Alert Bay- Non-Local Analysis.

- Non-Northern Vancouver Island Visitation from Victoria, Courtenay, Saanich and Comox ranked in the top 7 BC locations in 2019 and 2020.

- Non Island Visitation from Vancouver ranked within the top 7 visitor origin locations in 2019 and 2020.

Visitor Origin - 2019	
City	% of Total
Campbell River	9%
Nanaimo	8%
Victoria	6%
Courtenay	6%
Vancouver	5%
Saanich	5%
Comox	4%

Visitor Origin - 2020	
City	% of Total
Nanaimo	13%
Campbell River	12%
Courtenay	7%
Vancouver	7%
Surrey	4%
Comox	4%
Saanich	4%

VISITOR ORIGIN BY CITY
ALBERTA

Key Findings

- Calgary was the top Visitor Origin market across both years (2019 and 2020)

- Visitation from all other Alberta Cities were very low overall in 2019 and 2020

Visitor Origin - 2019	
City	% of Total
Calgary	52%
Edmonton	16%
Strathcona County	11%
Red Deer	9%
Hinton	6%

Visitor Origin - 2020	
City	% of Total
Calgary	61%
Mackenzie County	30%
Foothills No. 31	9%

VISITOR INSIGHTS

KEY FINDINGS
BRITISH COLUMBIA

Category	BC Visitors - 2019	BC Visitors - 2020	Key Findings
Estimated Visitor Volume and %	• 4,900 or 91% were from BC	• 4,800 or 95% were from BC	Key Findings comparing the full mobile analysis (including locals) to the analysis that does not include visitation from Port Hardy:
Top Visitor Origin Locations	• Campbell River • Nanaimo • Victoria • Courtenay • Vancouver • Saanich • Comox • Surrey • Coquitlam • North Saanich • Port Alberni • Richmond • Burnaby	• Nanaimo • Campbell River • Courtenay • Vancouver • Surrey • Comox • Saanich • Burnaby • Victoria • Abbotsford • Delta • Duncan • Ladysmith • West Vancouver	• The top 10 PRIZM Segments are similar across both analyses, however; Social Networkers, Suburban Sports, Savvy Seniors and Suburban Recliners also ranked in the secondary analysis (non-local) for 2019 and Suburban Sports, Stressed in Suburbia, Metro Melting Pot and Family Mode also ranked in the secondary analysis (non-local) for 2020
Top PRIZM Segments	• Scenic Retirement • Country & Western • Just Getting By • Indigenous Families • Slow-Lane Suburbs • Social Networkers • Suburban Sports • Indieville • Savvy Seniors • Suburban Recliners	• Scenic Retirement • Just Getting By • Suburban Recliners • Slow-Lane Suburbs • Savvy Seniors • Suburban Sports • Boomer Bliss • Stressed in Suburbia • Metro Melting Pot • Family Mode	
Top EQ Types	• Rejuvenators • Gentle Explorers • Authentic Experiencers	• Rejuvenators • Gentle Explorers • Authentic Experiencers	• The top three EQ Types are consistent across both years and analyses.

KEY FINDINGS
ALBERTA

Category	Alberta Visitors- 2019	Alberta Visitors- 2020
Estimated Visitor Volume and %	• 200 or 3% were from Alberta	• 200 or 2% were from Alberta
Top Visitor Origin Locations	• Calgary • Edmonton Visitation from Alberta was very limited in 2019	• Calgary • Mackenzie County Visitation from Alberta was very limited in 2020
Top PRIZM Segments	• Multiculture-ish • Stressed in Suburbia • Modern Suburbia • Suburban Sports • Turbo Burbs	• Country & Western • The A-List • Mid-City Mellow • Turbo Burbs • New Asian Heights
Top EQ Types	• Free Spirits • Gentle Explorers • Virtual Travellers	• Authentic Experiencers • Rejuvenators • Personal History Explorers

CURRENT VISITOR PROFILE
BRITISH COLUMBIA

BC Visitors (Non Local) - 2019

- The Median Household Maintainer Age for British Columbian visitors (Non-Local) to the Alert Bay Geo-Fenced Areas in 2019 was 54, 28% of couples have children living at home

- Average Household Income of $91,941 compared to BC at $106,681

- Top Social Value: Confidence in Small Business: A tendency to assume that small businesses are generally fair and ethical in their practices, committed to providing quality goods, and working in the public interest.

- Key Tourism Activities: Reading, Gardening, Swimming. Above Average interest in Cross Country Skiing/Snowshoeing, Fishing/Hunting

- Average interest in travelling within Canada (Above Average for: Alberta), British Columbian visitors (Non-Local) to the Alert Bay Geo-Fenced Areas in 2019 spent an average of $1,660 on their last vacation

- On average, British Columbian visitors to the Alert Bay Geo-Fenced Areas in 2019 spent 14hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.6hrs/day on the Internet. Daily Magazine usage is minimal (10min/day)

- 79% currently use Facebook, 36% use Instagram and 25% use Twitter

BC Visitors (Non Local) - 2020

- The Median Household Maintainer Age for British Columbian visitors (Non-Local) to the Alert Bay Geo-Fenced Areas in 2020 was 55, 30% of couples have children living at home

- Average Household Income of $97,326 compared to BC at $106,681

- Top Social Value: Need for Escape - The desire to regularly escape the stress and responsibilities of everyday life

- Key Tourism Activities: Reading, Gardening, Swimming. Above Average interest in Golfing, Cross Country Skiing/Snowshoeing, Fishing/Hunting

- Average interest in travelling within Canada (Above Average for: Alberta), British Columbian visitors (Non-Local) to the Alert Bay Geo-Fenced Areas in 2020 spent an average of $1,644 on their last vacation

- On average, British Columbian visitors to the Alert Bay Geo-Fenced Areas in 2020 spent 13hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.6hrs/day on the Internet. Daily Magazine usage is minimal (10min/day)

- 79% currently use Facebook, 35% use Instagram and 24% use Twitter

CURRENT VISITOR PROFILE
ALBERTA

Alberta Visitors - 2019

- The Median Household Maintainer Age for Alberta visitors to the Alert Bay Geo-Fenced Areas in 2019 was 42, 66% of couples have children living at home

- Average Household Income of $117,877 compared to Alberta at $122,710

- Top Social Value: Confidence in Advertising: A tendency to trust and use advertising as a source of reliable information. Also, a tendency to identify with the fashions and the role models promoted by advertising and the consumer society

- Key Tourism Activities: Camping, Swimming, Above Average interest in Attending Sporting Events, Cycling, Zoos/Aquariums, Photography

- Above Average interest in travelling within Canada (Banff, Calgary, Jasper), Alberta visitors to the Alert Bay Geo-Fenced Areas in 2019 spent an average of $1,335 on their last vacation

- On average, Alberta visitors to the Alert Bay Geo-Fenced Areas in 2019 spent 10hrs/week listening to the Radio, 19hrs/week watching TV, 1hr/week reading the Newspaper and 3.9hrs/day on the Internet. Daily Magazine usage is minimal (3min/day)

- 79% currently use Facebook, 45% use Instagram (17% above average) and 38% use Twitter (30% above average)

Alberta Visitors - 2020

- The Median Household Maintainer Age for Alberta visitors to the Alert Bay Geo-Fenced Areas in 2020 was 45, 62% of couples have children living at home

- Above Average Household Income of $140,345 compared to Alberta at $122,710

- Top Social Value: Ecological Fatalism: A tendency to believe that today's environmental problems are too big for any one person to affect. People strong on this construct feel that environmental destruction is somewhat acceptable and inevitable and accept the notion that job protection or economic advancement should be allowed at the expense of environmental protection. They also view environmental leaders as misguided and overly extreme

- Key Tourism Activities: Camping, Swimming, Cycling, Above Average interest in Hockey

- Average interest in travelling within Canada (Above Average for: Jasper, Manitoba), Alberta visitors to the Alert Bay Geo-Fenced Areas in 2020 spent an average of $1,414 on their last vacation

- On average, Alberta visitors to the Alert Bay Geo-Fenced Areas in 2020 spent 12hrs/week listening to the Radio, 19hrs/week watching TV, 1hr/week reading the Newspaper and 3.8hrs/day on the Internet. Daily Magazine usage is minimal (6min/day)

- 80% currently use Facebook, 41% use Instagram and 31% use Twitter. 16% above average use of Snapchat

KEY VARIABLE HIGHLIGHTS
BRITISH COLUMBIA & ALBERTA

Variable	BC Visitors - 2019	BC Visitors - 2020	AB Visitors - 2019	AB Visitors - 2020
I am interested in learning about different cultures	63% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy learning about different cultures	63% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy learning about different cultures	55% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy learning about different cultures	57% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy learning about different cultures
I occasionally/regularly participate in Camping activities	54% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy camping activities	54% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy camping activities	56% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy camping activities	58% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy camping activities
I occasionally/regularly participate in Whale Watching activities	11% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy Whale Watching activities	11% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy Whale Watching activities	4% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy Whale Watching activities	6% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy Whale Watching activities
I occasionally/regularly participate in Fishing/Hunting activities	28% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy fishing/hunting activities	27% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy fishing/hunting activities	17% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy fishing/hunting activities	24% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy fishing/hunting activities
I occasionally/regularly participate in Hiking/Backpacking activities	52% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy hiking/backpacking activities	52% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy hiking/backpacking activities	36% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy hiking/backpacking activities	32% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy hiking/backpacking activities
I occasionally/regularly participate in Swimming activities	59% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy swimming activities	60% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy swimming activities	55% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy swimming activities	53% of the Visitors sampled within the Geo-fenced Alert Bay area enjoy swimming activities

SUMMARY HIGHLIGHTS
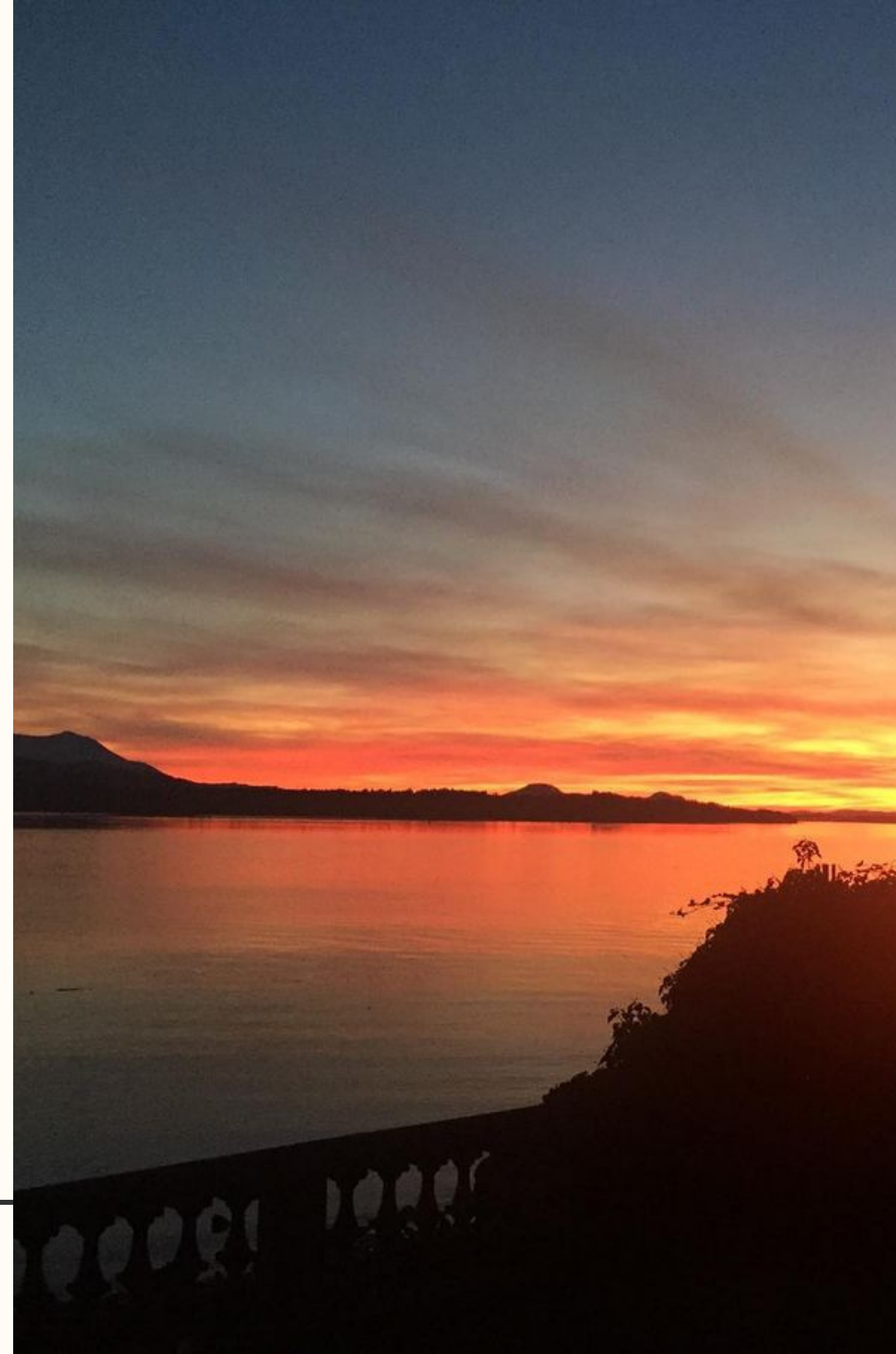## BRITISH COLUMBIA

- British Columbia was the primary origin of Alert Bay Visitors, making up **91%** of visitation in 2019 and **95%** in 2020

- Campbell River, Nanaimo and Victoria were the top three visitor origin locations in 2019 and Nanaimo, Campbell River and Courtenay were the top three in 2020

- **Scenic Retirement, Country & Western and Just Getting By** were the top three PRIZM Segments in 2019 and Scenic Retirement, Just Getting By and Suburban Recliners were the top three in 2020

  - **Scenic Retirement** are typically older and more mature, middle-income suburbanites, who enjoy: Visiting Parks/City Gardens, Photography Canoeing and Kayaking
  - **Country & Western** are typically middle aged, below average income travellers who enjoy: Snowmobiling, Hiking, Camping, Boating
  - **Just Getting By** are typically Younger, low-income city singles and families who value leisure activities, visiting chain restaurants and keeping up to date on entertainment and celebrity gossip
  - **Suburban Recliners** are typically suburban downscale singles and couples who enjoy community theatre, music festivals and visiting national/provincial parks

- **The top three EQ Types of visitors from BC are consistent during both years (Rejuvenators, Gentle Explorers and Authentic Experiencers)**

SUMMARY HIGHLIGHTS
ALBERTA

- Alberta was the secondary origin location of Alert Bay Visitors (although visitor counts were still minimal), making up **3%** of visitation in 2019 and **2%** in 2020

- Calgary was the top visitor origin markets in 2019 and 2020 (followed by Edmonton in 2019 and Mackenzie County in 2020). Although visitation was minimal from all other Alberta locations

- The top three PRIZM Segments visiting Alert Bay in 2019 were Multiculture-ish, Stressed in Suburbia and Modern Suburbia. The top three in 2020 were Country & Western, the A-List and Mid-City Mellow

  - **Multiculture-ish** are typically ethnically diverse middle-aged Asian and South Asian households who value ethnic diversity within their communities, work ethic and advertising
  - **Stressed in Suburbia** are typically middle-income, younger and middle-aged suburban families who enjoy outdoor sports and cultural activities
  - **Modern Suburbia** are typically highly educated younger and Middle-Aged, diverse families with younger children who value trying new and exciting products and aesthetics over functionality
  - **Country & Western** are typically Older, middle-income western homeowners who value outdoor experiencers, boating, camping, hiking, snowmobiles and motorcycles
  - **The A –List** are Canada's wealthiest segment. They are typically Middle-aged and older couples and families with older children (ages 10-25) who value community involvement, cultural diversity and having a healthy lifestyle
  - **Mid-City Mellow** are typically Older, more mature singles and middle-aged families with older children. They value community involvement and the preservation of cultural traditions as well as brand authenticity

- The top three EQ Types visiting Alert Bay from Alberta in 2019 were Free Spirits, Gentle Explorers and Virtual Travellers. The top three in 2020 were Authentic Experiencers, Rejuvenators and Personal History Explorers

- Alberta Visitors to the Alert Bay geo-fenced area tend to be younger, wealthier and more family oriented than BC Travellers to Alert Bay. They enjoy outdoor activities such as camping, swimming and cycling and 66% have children living at home.

INSIGHTS
POTENTIAL GROWTH MARKETS

| British Columbia	Alberta	Considerations	COVID-19 Considerations

• Vancouver Island (Campbell River, Nanaimo, Victoria, Courtenay)
  ○ Semi-Frequent travellers who are looking to understand and explore their "Own Backyard" or different locations on Vancouver Island
 	
• Local Northern Vancouver Island Residents (Port McNeill, Mount Waddington, Alert Bay, Port Hardy)
  ○ These are local visitors who understand your products/services and visited in 2019 and 2020
 	
• Lower Mainland Visitors (Vancouver, Surrey)
  ○ Less frequent travellers looking for experiences that allow them to connect with nature and experience different outdoor activities
	• Calgary
	  ○ Loyal Visitors (Wealthier and more Family Oriented) who are ethnically diverse and are looking to understand your products/services through family based leisure activities
	
	•
	  ○ **Note:** 2019 Visitors from Alberta ranked above average for many outdoor activities. 2020 Visitors did not rank as high for the same activities
	
	• Edmonton/Mackenzie County
	  ○ Visitors on a much smaller scale
		• Consider targeting by BC Top PRIZM Segments:
		  ○ Scenic Retirement
		  ○ Just Getting By
		  ○ Country & Western
		  ○ Indigenous Families
		  ○ Slow-lane Suburbs
		  ○ Suburban Recliners
		
		• Top 10 Locations of Top PRIZM Segments:
		  ○ Abbotsford
		  ○ Nanaimo
		  ○ Kelowna
		  ○ Prince George
		  ○ Chilliwack
		  ○ Kamloops
		  ○ Vernon
		  ○ Victoria
		  ○ Langley
		  ○ Maple Ridge
		  ○ Penticton
			British Columbia announced a Provincial State of Emergency due to the COVID-19 Pandemic on March 18, 2020, Alberta announced on March 17, 2020
			
			Province wide restrictions limiting social interactions and travel are still in place
			
			BC COVID-19 Travel Restrictions

VISITOR PERSONAS
PRIZM SEGMENTS

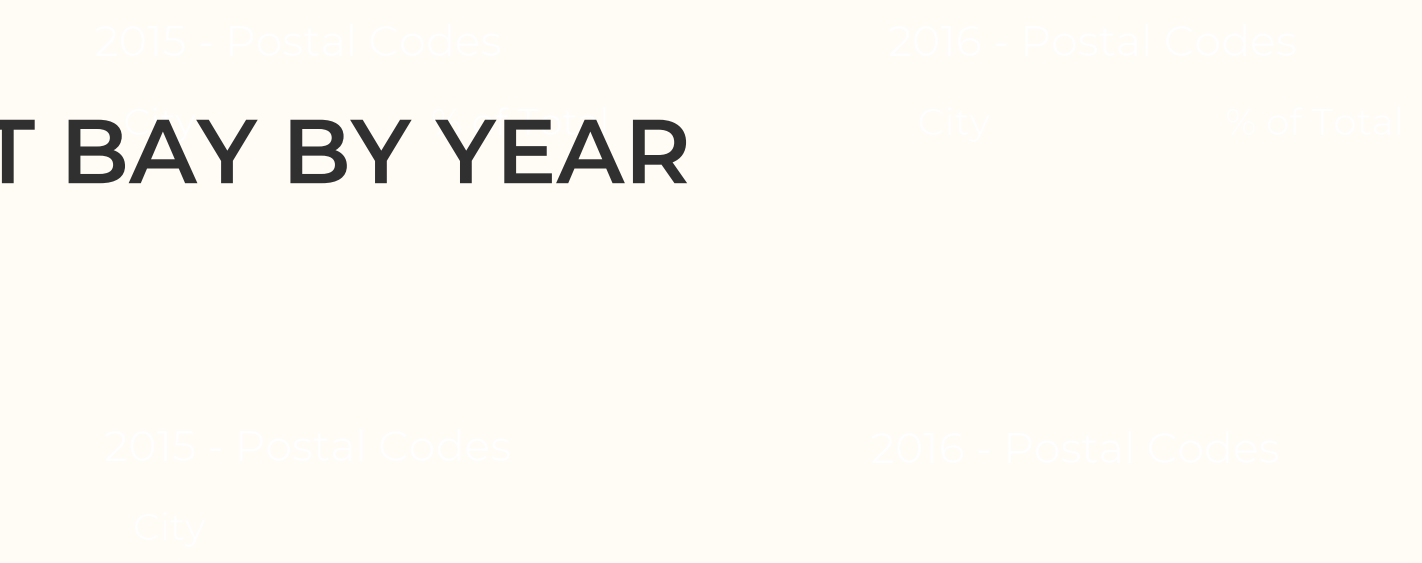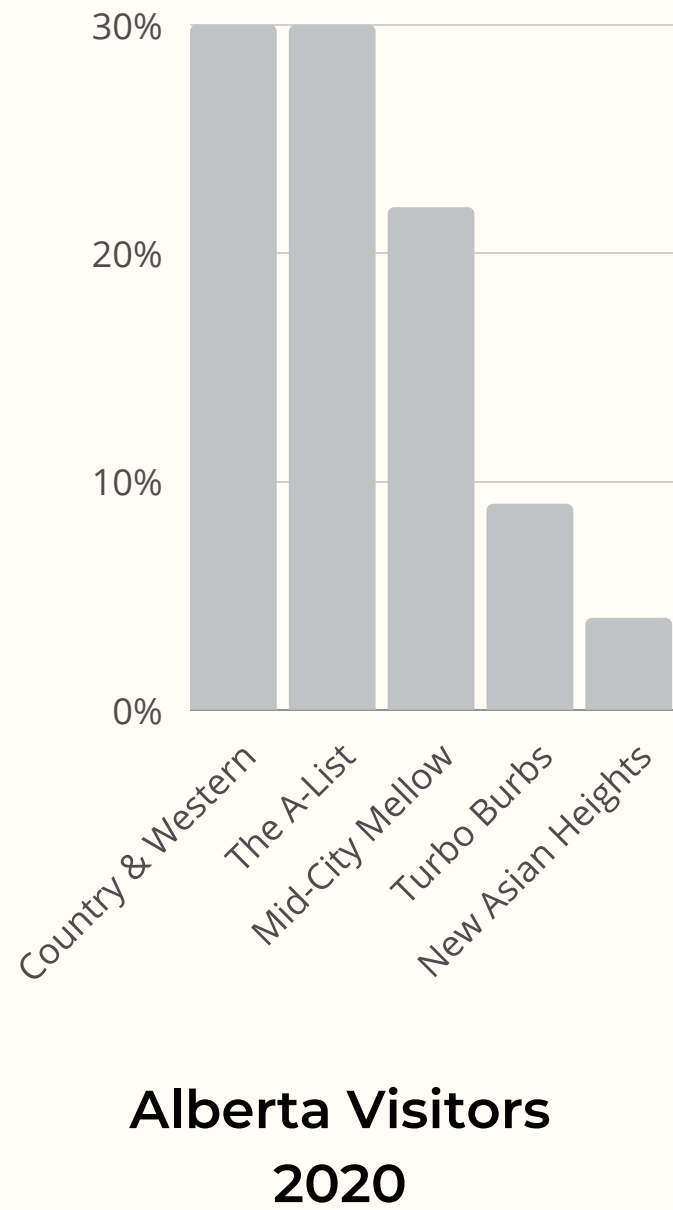# TOP PRIZM SEGMENTS OF VISITORS TO THE ALERT BAY AREA BY YEAR
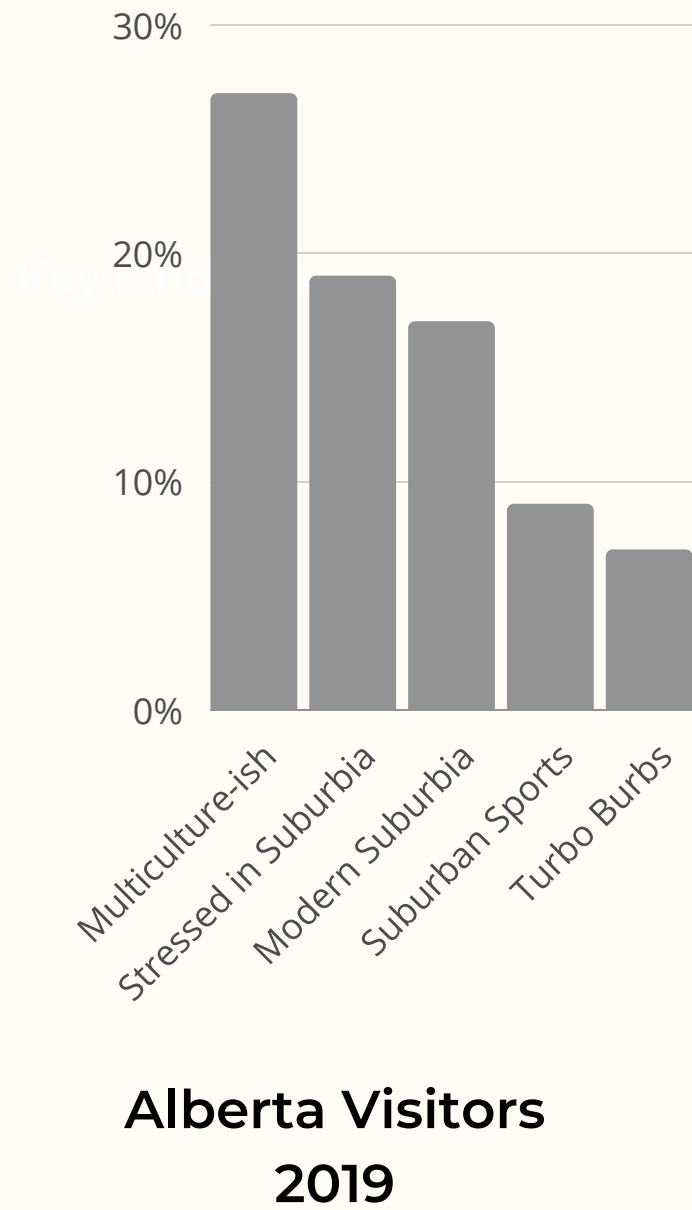## BRITISH COLUMBIA
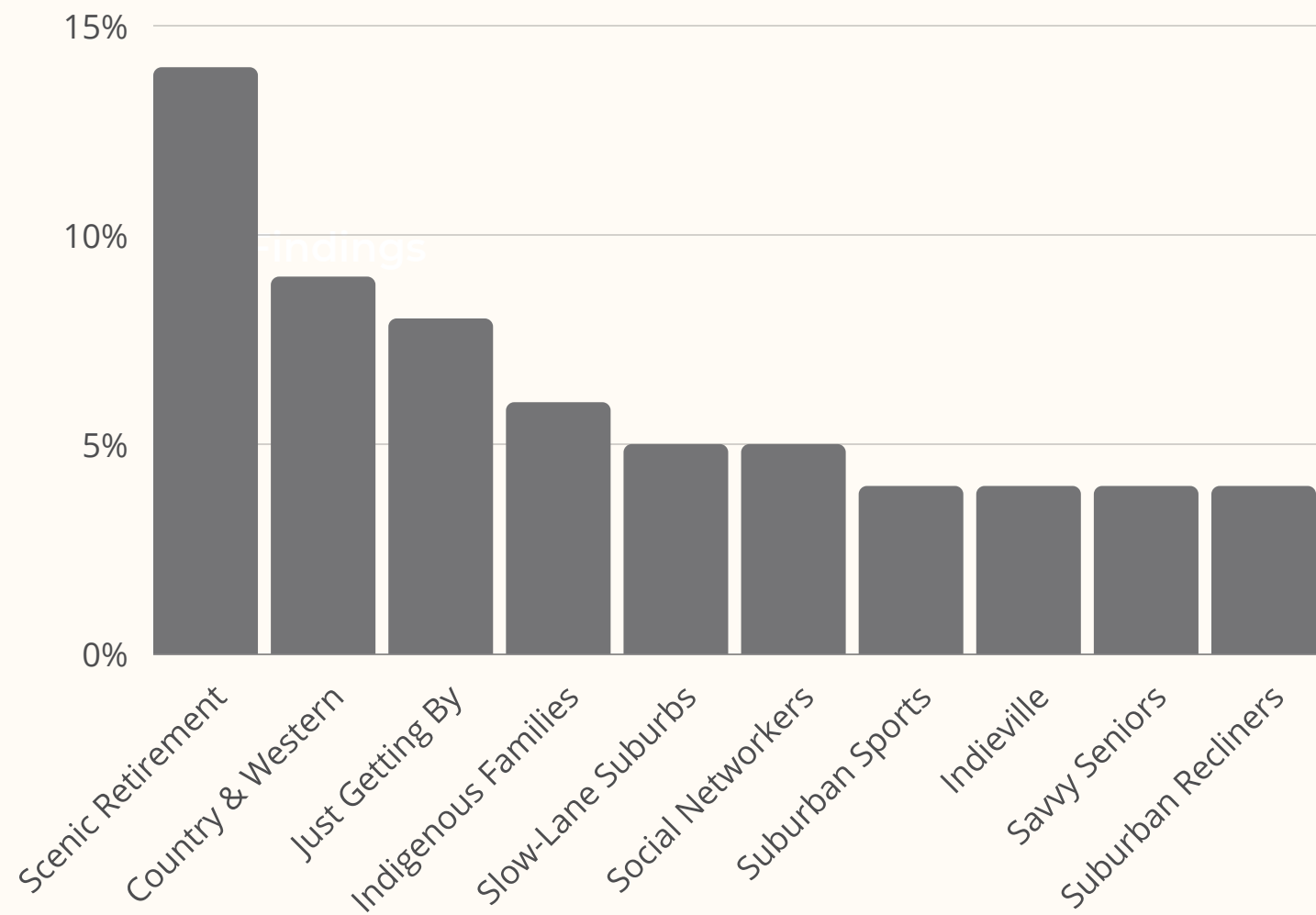
BC Visitors - Non-Local 2019
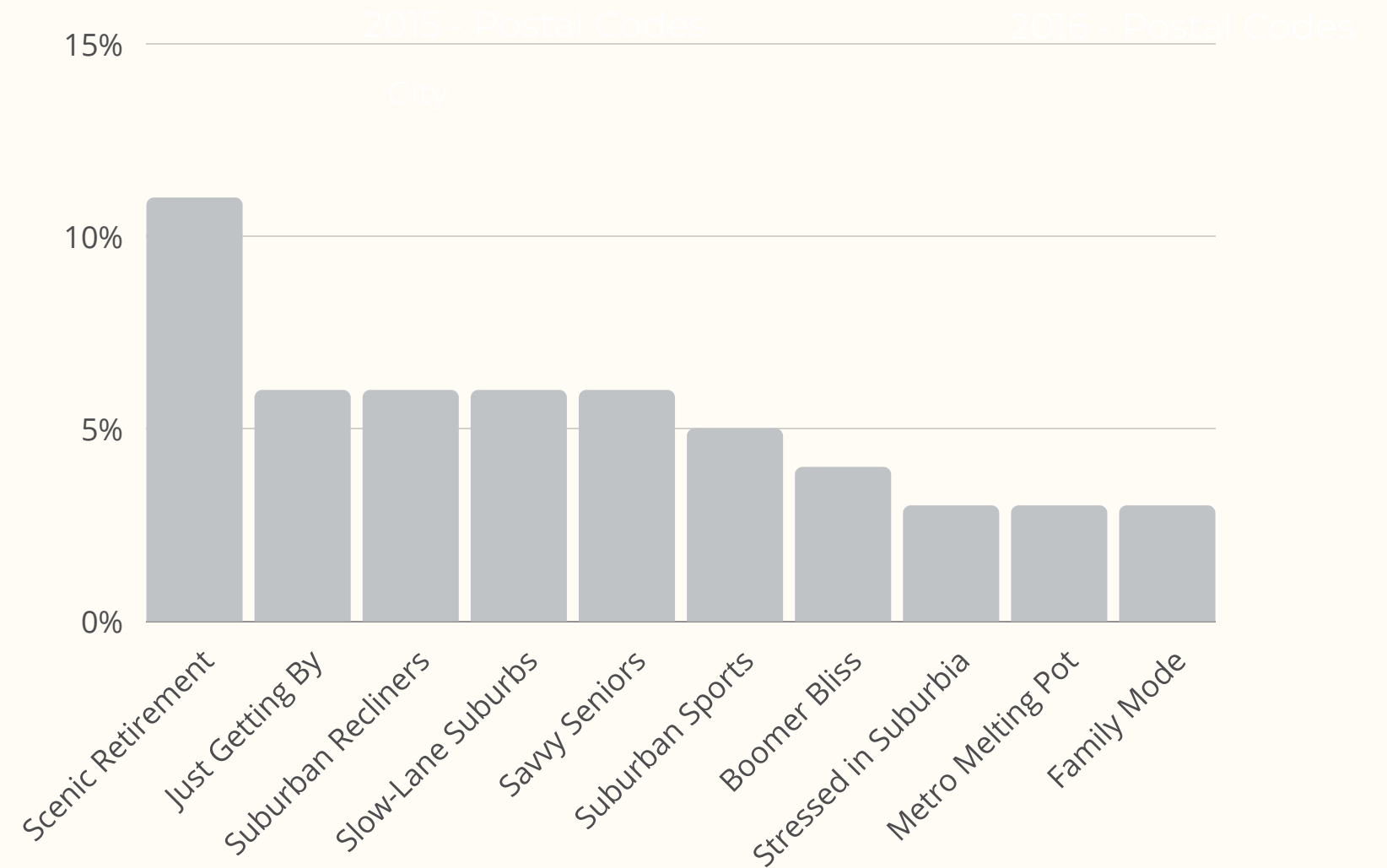
BC Visitors - Non-Local 2020

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY BY YEAR
ALBERTA

Alberta Visitors 2019

Alberta Visitors 2020

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
BRITISH COLUMBIA MARKET

Category	Backcountry Boomers	Country & Western	Indigenous Families	Just Getting By	Savvy Seniors
Household Count	• Rank 15th by Household Count • 54,847 households, or 2.7% of the total Households in BC	• Rank 1st by Household Count • 123,442 households, or 6.1% of the total Households in BC	• Rank 32nd by Household Count • 23,088 households, or 1.1% of the total Households in BC	• Rank 12th by Household Count • 65,327 households, or 3.2% of the total Households in BC	• Rank 6th by Household Count • 85,564 households, or 4.3% of the total Households in BC
Maintainer Age	63	52	54	51	60
% of Children at Home	37% of couples have children living at home	47% of couples have children living at home	37% of couples have children living at home	56% of couples have children living at home	48% of couples have children living at home
Household Income	Below Average Household Income of $85,977 compared to BC at $106,681	Above Average Household Income of $120,592 compared to BC at $106,681	Below Average Household Income of $79,525 compared to BC at $106,681	·Below Average Household Income of $62,460 compared to BC at $106,681	Average Household Income of $104,131 compared to BC at $106,681
Top Social Value	Attraction to Nature	Racial Fusion	Attraction to Nature	Primacy of Environmental Protection	Culture Sampling
Social Media Habits	83% currently use Facebook, 30% use Instagram and 20% use Twitter	79% currently use Facebook, 36% use Instagram and 23% use Twitter	85% currently use Facebook, 35% use Instagram and 26% use Twitter	81% currently use Facebook, 35% use Instagram and 24% use Twitter	79% currently use Facebook, 36% use Instagram and 25% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
BRITISH COLUMBIA MARKET CONTINUED

Category	Scenic Retirement	Slow-Lane Suburbs	Suburban Recliners	Suburban Sports
Household Count	• Rank 2nd by Household Count • 94,025 households, or 4.7% of the total Households in BC	• Rank 28th by Household Count • 28,299 households, or 1.4% of the total Households in BC	• Rank 14th by Household Count • 56,046 households, or 2.8% of the total Households in BC	• Rank 1st by Household Count • 123,442 households, or 6.1% of the total Households in BC
Maintainer Age	64	56	60	52
% of Children at Home	39% of couples have children living at home	52% of couples have children living at home	46% of couples have children living at home	47% of couples have children living at home
Household Income	Average Household Income of $100,586 compared to BC at $106,681	·Below Average Household Income of $87,080 compared to BC at $106,681	·Below Average Household Income of $75,008 compared to BC at $106,681	Above Average Household Income of $120,592 compared to BC at $106,681
Top Social Value	Ethical Consumerism	National Pride	Racial Fusion	Racial Fusion
Social Media Habits	79% currently use Facebook, 30% use Instagram and 21% use Twitter	81% currently use Facebook, 34% use Instagram and 22% use Twitter	82% currently use Facebook, 32% use Instagram and 21% use Twitter	79% currently use Facebook, 36% use Instagram and 23% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
ALBERTA MARKET

Category	Multiculture-ish	Stressed in Suburbia	Modern Suburbia	Suburban Sports	Turbo Burbs
Household Count	• Rank 13th by Household Count • 46,523 households, or 2.8% of the total Households in AB	• Rank 15th by Household Count • 42,788 households, or 2.6%% of the total Households in AB	• Rank 1st by Household Count • 123,489 households, or 7.5% of the total Households in AB	• Rank 9th by Household Count • 61,676 households, or 3.8% of the total Households in AB	• Rank 22nd by Household Count • 34,645 households, or 2.1% of the total Households in AB
Maintainer Age	48	48	41	50	55
% of Children at Home	65% of couples have children living at home	44% of couples have children living at home	58% of couples have children living at home	46% of couples have children living at home	51% of couples have children living at home
Household Income	Above Average Household Income of $166,844 compared to AB at $125,945	Below Average Household Income of $110,451 compared to AB at $125,945	Above Average Household Income of $141,199 compared to AB at $125,945	Average Household Income of $136,314 compared to AB at $125,945	Above Average Household Income of $225,242 compared to AB at $125,945
Top Social Value	Legacy	Racial Fusion	Confidence in Advertising	Racial Fusion	Racial Fusion
Social Media Habits	75% currently use Facebook, 43% use Instagram and 36% use Twitter	80% currently use Facebook, 37% use Instagram and 27% use Twitter	77% currently use Facebook, 48% use Instagram and 36% use Twitter	79% currently use Facebook, 35% use Instagram and 25% use Twitter	77% currently use Facebook, 36% use Instagram and 29% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
ALBERTA MARKET CONTINUED

Category	Country & Western	The A-List	Mid-City Mellow	New Asian Heights
Household Count	• Rank 6th by Household Count • 70,151 households, or 4.3% of the total Households in AB	• Rank 28th by Household Count • 64,272 households, or 3.9% of the total Households in AB	• Rank 12th by Household Count • 53,453 households, or 3.3% of the total Households in AB	• Rank 50th by Household Count • 3,350 households, or 0.2% of the total Households in AB
Maintainer Age	54	57	58	36
% of Children at Home	56% of couples have children living at home	55% of couples have children living at home	57% of couples have children living at home	27% of couples have children living at home
Household Income	Below Average Household Income of $99,744 compared to AB at $125,945	Above Average Household Income of $466,483 compared to AB at $125,945	Average Household Income of $119,718 compared to AB at $125,945	Below Average Household Income of $74,900 compared to AB at $125,945
Top Social Value	Emotional Control	Culture Sampling	Culture Sampling	Culture Sampling
Social Media Habits	82% currently use Facebook, 32% use Instagram and 21% use Twitter	73% currently use Facebook, 38% use Instagram and 31% use Twitter	78% currently use Facebook, 35% use Instagram and 27% use Twitter	77% currently use Facebook, 42% use Instagram and 31% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
CANADIAN PRIZM SUMMARIES

Backcountry Boomers	Country & Western	Indigenous Families	Just Getting By	Mid-City Mellow

Backcountry Boomers are typically:
 	
• Rural, lower-middle-income older couples and singles
 	
• Below Average Household Income
 	
• Enjoy:
  ○ Photography
  ○ Visiting Parks/City Gardens
	Country & Western are typically:
	
	• Middle-aged
	
	• Below-average income travellers
	
	• Value outdoor experiences such as:
	  ○ Snowmobiling
	  ○ Hiking
	  ○ Camping
	  ○ Boating
		Indigenous Families are typically:
		
		• Younger and middle-aged First Nations, Inuit and Métis families
		
		• Nearly 95% of residents are of Indigenous origin
		
		• Enjoy
		  ○ Camping
		  ○ Visiting Parks/City Gardens
		  ○ Photography
			Just Getting By are typically:
			
			• Younger, low-income city singles and families
			
			• Enjoy:
			  ○ Visiting Parks/City Gardens
			  ○ Adventure Sports
			
			• Value leisure activities, visiting chain restaurants and keeping up to date on entertainment and celebrity gossip
				Mid-City Mellow are typically:
				
				• Older, more mature singles and middle-aged families with older children
				
				• Enjoy:
				  ○ Visiting National/Provincial Parks,
				  ○ Golfing
				  ○ Downhill Skiing
				
				• Value community involvement and the preservation of cultural traditions as well as brand authenticity

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
CANADIAN PRIZM SUMMARIES CONTINUED

Modern Suburbia	Multiculture-ish	New Asian Heights	Savvy Seniors	Scenic Retirement

Modern Suburbia are typically:
 	
• Younger and Middle-Aged, diverse families with younger children
 	
• Enjoy:
  ○ Pilates/Yoga
  ○ Ice Skating
 	
• Value trying new and exciting products and aesthetics over functionality
	Multiculture-ish are typically:
	
	• Ethnically diverse middle-aged Asian and South Asian households
	
	• Enjoy:
	  ○ Ice Skating
	  ○ Video Arcades and Indoor Amusement Parks
	
	• Value ethnic diversity within their communities, work ethic and advertising
		New Asian Heights are typically:
		
		• Younger, Educated Asian Singles and Couples
		
		• Enjoy:
		  ○ Hiking/Backpacking
		  ○ Visiting Zoos/Aquariums
		
		• Value city life and a fast-paced urban environment, shopping, going out to pubs and sports bars
			Savvy Seniors are typically:
			
			• Upper-Middle-income Seniors in Urban Apartments. Nearly 40% of maintainers are over 65
			
			• Enjoy:
			  ○ Golf
			  ○ Camping
			  ○ Hiking
			  ○ Visiting Parks/City Gardens
			
			• Value cultural activities, art galleries, the theatre and classical music concerts
				Scenic Retirement are typically:
				
				• Older and more mature, middle-income suburbanites
				
				• Enjoy:
				  ○ Visiting Parks/City Gardens
				  ○ Photography
				  ○ Canoeing and Kayaking
				
				• Value traditional media and home-based hobby crafts

TOP PRIZM SEGMENTS OF VISITORS TO ALERT BAY 2019/2020
CANADIAN PRIZM SUMMARIES CONTINUED

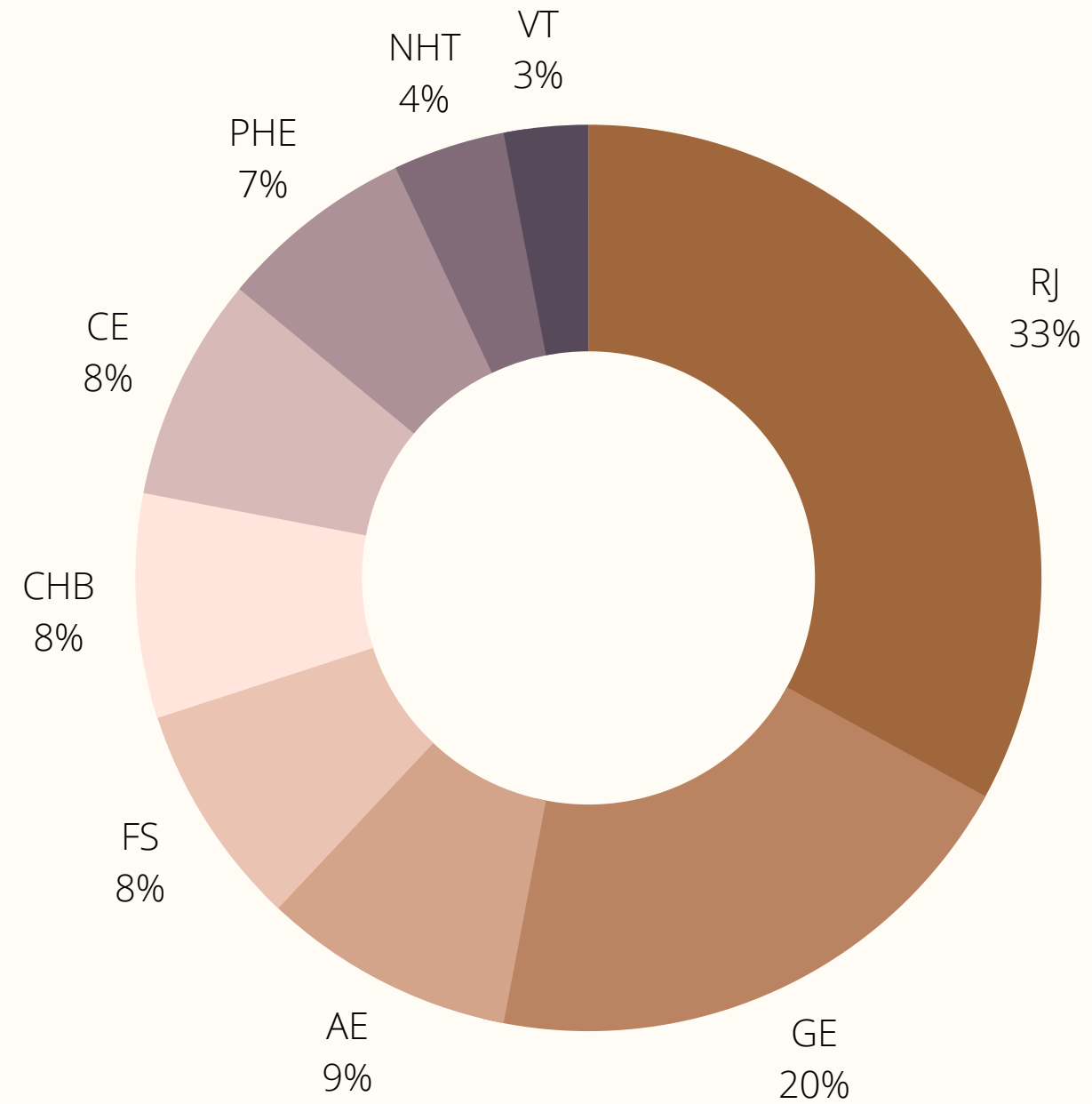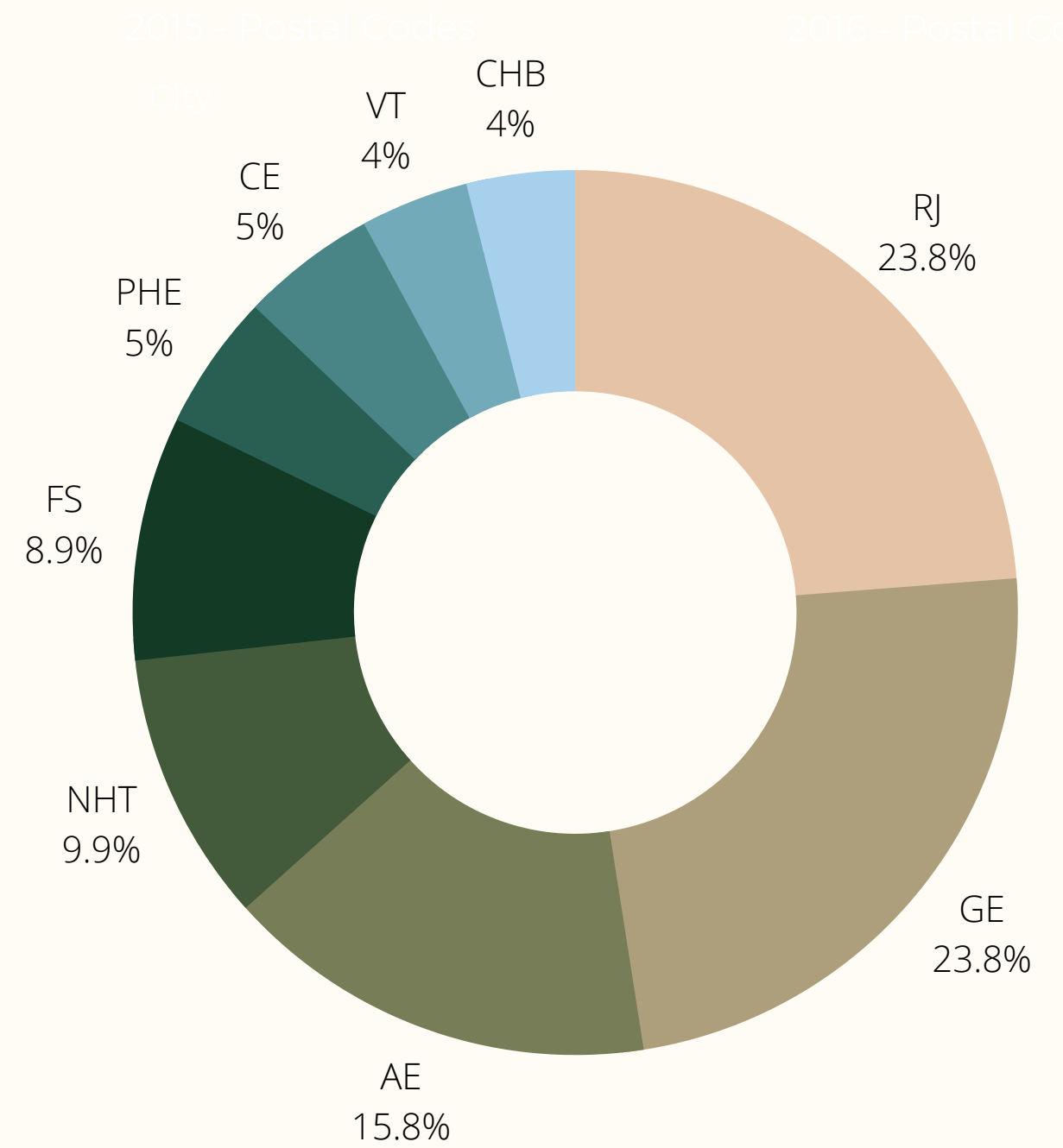| Slow-Lane Suburbs	Stressed in Suburbia	Suburban Recliners	Suburban Sports	The A-List	Turbo Burbs

Slow-Lane Suburbs are typically:
 	
• Older and mature suburban singles and couples
 	
• Enjoy:
  ○ Camping
  ○ Visiting Parks/City Gardens
  ○ Photography
 	
• Value leisure-intensive lifestyles, casinos, community theatre,
  ○ beer/food/wine festivals
	Stressed in Suburbia are typically:
	
	• Middle-Income, younger and middle-aged suburban families
	
	• Below Average Household Income
	
	• Enjoy:
	  ○ Swimming
	  ○ Camping
	  ○ Fishing/Hunting
		Suburban Recliners are typically:
		
		• Suburban downscale singles and couples many are retired Empty-Nesters
		
		• Enjoy:
		  ○ Community Theatre
		  ○ Visiting National/Provincial Parks
		  ○ Casinos
		• Suburban Recliners are socially progressive and prefer a more casual approach to life
			Suburban Sports are typically:
			
			• Middle-aged couples and families
			
			• Enjoy:
			  ○ Camping
			  ○ Fishing/Hunting
			  ○ Cross Country Skiing and Snowshoeing
			
			• Value community involvement and companies that treat their employees fairly
				The A-List are typically:
				
				• Canada's most affluent segment
				
				• Middle-aged and older couples and families with older children (ages 10-25)
				
				• Enjoy:
				  ○ Visiting Restaurants/Bars
				  ○ Downhill Skiing
				  ○ Visiting Zoos/Aquariums
				
				• Value community involvement, cultural diversity and having a healthy lifestyle
					Turbo Burbs are typically:
					
					• Middle-aged couples and families (with children ages 10-24 at home)
					
					• Enjoy:
					  ○ Camping
					  ○ Visiting Parks/City Gardens
					  ○ Cycling
					
					• Value products offered by companies that are good corporate citizens as well as small, local businesses

VISITOR PERSONAS

EQ TYPES

TOP EQ TYPES OF VISITORS TO THE ALERT BAY AREA BY YEAR
BRITISH COLUMBIA

BC Visitors Non-Local - 2019

2019 chart values:
- RJ 33%
- GE 20%
- AE 9%
- FS 8%
- CHB 8%
- CE 8%
- PHE 7%
- NHT 4%
- VT 3%

BC Visitors Non-Local - 2020

2020 chart values:
- RJ 23.8%
- GE 23.8%
- AE 15.8%
- NHT 9.9%
- FS 8.9%
- PHE 5%
- CE 5%
- VT 4%
- CHB 4%

Authentic Experiencers (AE)
Cultural History Buffs (CHB)
Cultural Explorers (CE)

Free Spirits (FS)
Gentle Explorers (GE)
No Hassle Travellers (NHT)

Personal History Explorers (PHE)
Rejuvenators (RJ)
Virtual Travellers (VT)

TOP EQ TYPES OF VISITORS TO ALERT BAY BY YEAR
ALBERTA

Alberta Visitors - 2019

FS 30%
GE 30%
VT 17%
RJ 11%
AE 10%
CE 2%

AB Visitors - 2020

AE 38.4%
RJ 30.3%
PHE 22.2%
CHB 4%
VT 3%
FS 2%

Authentic Experiencers (AE)
Cultural History Buffs (CHB)
Cultural Explorers (CE)

Free Spirits (FS)
Gentle Explorers (GE)
No Hassle Travellers (NHT)

Personal History Explorers (PHE)
Rejuvenators (RJ)
Virtual Travellers (VT)
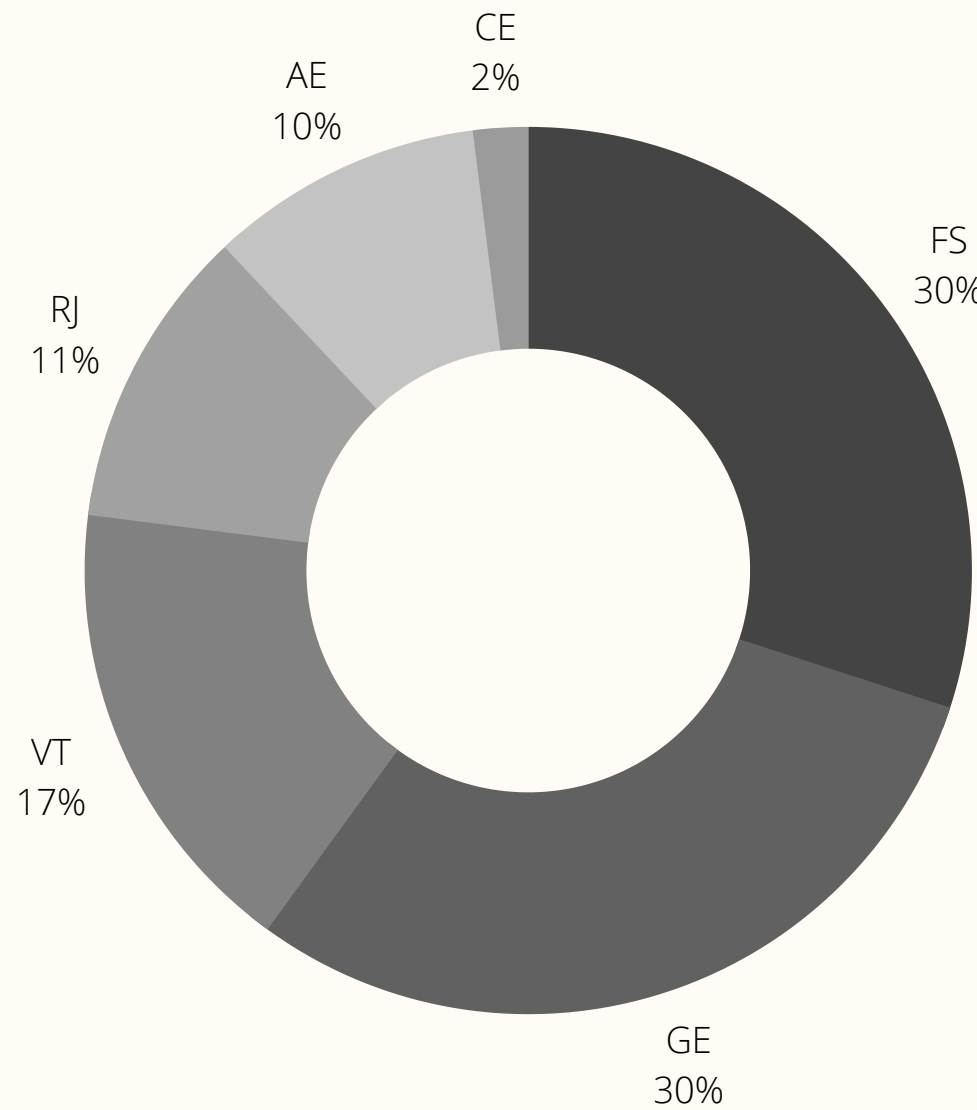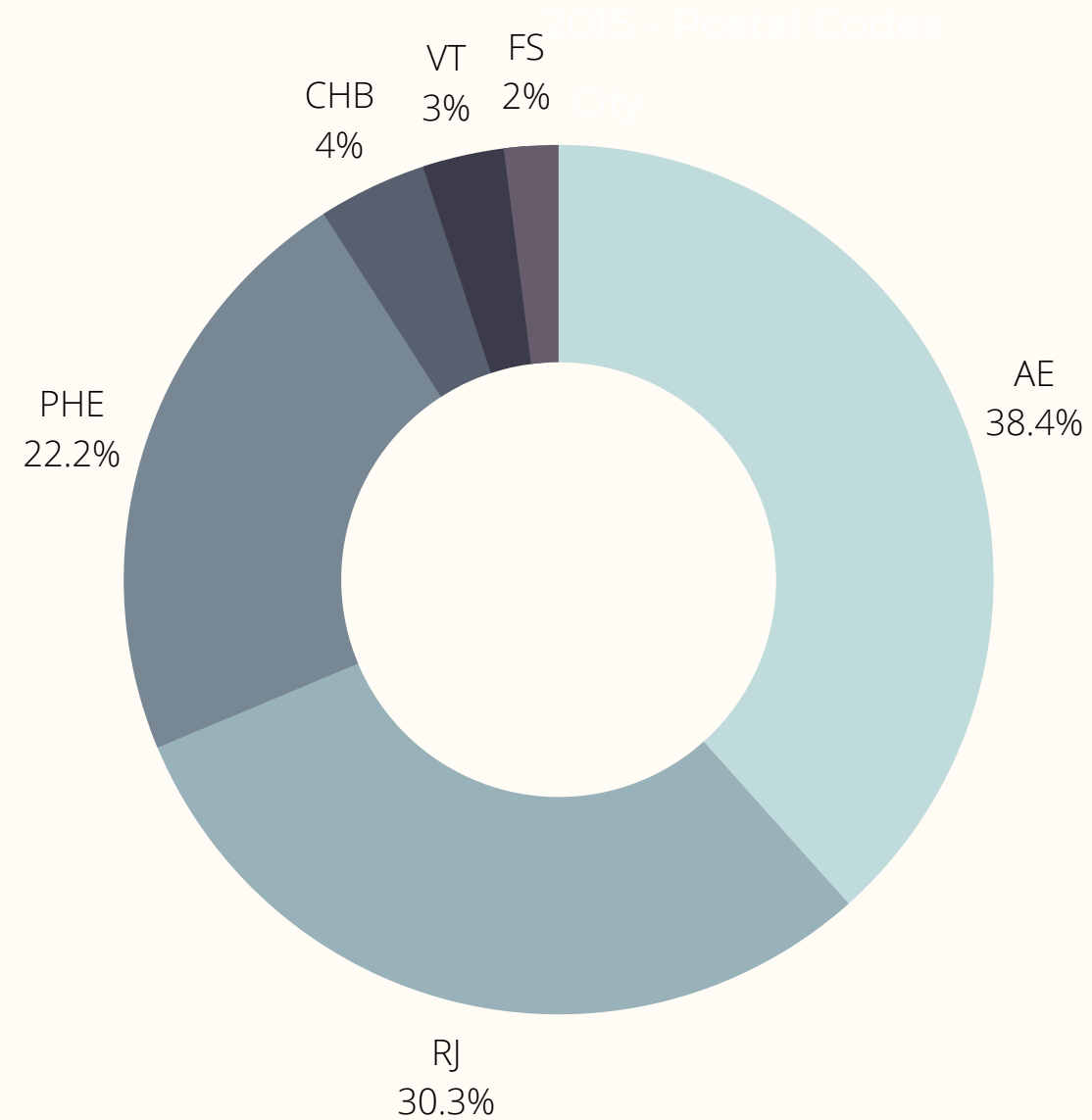
TOP EQ TYPES OF VISITORS TO ALERT BAY
BRITISH COLUMBIA MARKET

Category	Rejuvenators	Gentle Explorers	Authentic Experiencers
Household Count	• Rank 3rd by Household Count • 294,476 households, or 14.6% of the total Households in BC	• Rank 1st by Household Count • 322,371 households, or 16% of the total Households in BC	• Rank 4th by Household Count • 260,859 households, or 13% of the total Households in BC
Maintainer Age	59	54	59
% of Children at Home	46% of couples have children living at home	47% of couples have children living at home	54% of couples have children living at home
Household Income	Average Household Income of $99,976 compared to BC at $106,681	Below Average Household Income of $93,549 compared to BC at $106,681	Above Average Household Income of $152,393 compared to BC at $106,681
Top Social Value	Attraction to Nature	Racial Fusion	Culture Sampling
Social Media Habits	81% currently use Facebook, 32% use Instagram and 21% use Twitter	80% currently use Facebook, 35% use Instagram and 23% use Twitter	76% currently use Facebook, 34% use Instagram and 25% use Twitter

TOP EQ TYPES OF VISITORS TO ALERT BAY
ALBERTA MARKET

Category	Authentic Experiencers	Free Spirits	Gentle Explorers
Household Count	• Rank 3rd by Household Count • 207,086 households, or 12.6% of the total Households in AB	• Rank 1st by Household Count • 322,609 households, or 19.6% of the total Households in AB	• Rank 5th by Household Count • 199,412 households, or 12.1% of the total Households in AB
Maintainer Age	57	46	50
% of Children at Home	49% of couples have children living at home	53% of couples have children living at home	41% of couples have children living at home
Household Income	•Above Average Household Income of $211,249 compared to Alberta at $125,945	Average Household Income of $122,710 compared to AB at $125,945	Below Average Household Income of $104,079 compared to AB at $125,945
Top Social Value	Culture Sampling	Need for Escape	Racial Fusion
Social Media Habits	76% currently use Facebook, 37% use Instagram and 30% use Twitter	79% currently use Facebook, 42% use Instagram and 33% use Twitter	80% currently use Facebook, 36% use Instagram and 26% use Twitter

TOP EQ TYPES OF VISITORS TO ALERT BAY
ALBERTA MARKET CONTINUED

Category	Personal History Explorers	Rejuvenators	Virtual Travellers
Household Count	• Rank 7th by Household Count • 70,695 households, or 4.3% of the total Households in AB	• Rank 3rd by Household Count • 237,088 households, or 14.4% of the total Households in AB	• Rank 9th by Household Count • 141,229 households, or 8.6% of the total Households in AB
Maintainer Age	57	55	42
% of Children at Home	57% of couples have children living at home	54% of couples have children living at home	56% of couples have children living at home
Household Income	Average Household Income of $111,184 compared to AB at $125,945	Below Average Household Income of $110,045 compared to AB at $125,945	Average Household Income of $136,350 compared to AB at $125,945
Top Social Value	Culture Sampling	Attraction to Nature	Confidence in Advertising
Social Media Habits	78% currently use Facebook, 35% use Instagram and 26% use Twitter	80% currently use Facebook, 32% use Instagram and 22% use Twitter	78% currently use Facebook, 46% use Instagram and 35% use Twitter

TOP EQ TYPES OF VISITORS TO ALERT BAY
CANADIAN EQ SUMMARIES

Authentic Experiencers	Free Spirits	Gentle Explorers
• Affluent, highly educated mature singles and couples with older children; living in urban and suburban neighbourhoods	• Ethnically diverse, well educated families that earn moderate incomes; living in urban and suburban areas	• Middle-class families with children at home; higher rates of 4+ persons at home; below average rates of travel
• Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit	• Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others	• Gentle Explorers are primarily defined by their reluctance to venture far beyond the comfort of home
• Tend to be older, highly educated and adventurous	• Tend to be young, experimentalist, committed travellers looking for thrills and frills. They live the travel experience to the fullest	• They travel 'on condition', demanding the very best and most comfortable environments for themselves when they must do so
• Relish experiencing all their travel destination has to offer in a reserved and non-exorbitant way	• They seek some structure when they travel so they can indulge in worry-free hedonistic activities	• They are apprehensive travellers who prefer the tried and true over discovering new destinations and cultures
• Drawn to nature and are likely to seek it out far and wide	• Enjoy the best they can afford in terms of accommodations and restaurants	• They prefer creature comforts and the security of group travel
• Travel is an important part of their lives, so they are likely to go often and for a while		• Travel is an opportunity to act more vividly and spontaneously than when at home

TOP EQ TYPES OF VISITORS TO ALERT BAY
CANADIAN EQ SUMMARIES CONTINUED

Personal History Explorers

- Diverse families living in both urban and rural areas; lower levels of educational attainment and earning below-average incomes

- As travellers, Personal History Explorers are primarily defined by their desire to connect to their own cultural roots, and do so by travelling in comfort, style and security

- They are a more culturally diverse group

- Social people who enjoy being with others when travelling and favour group travel

Rejuvenators

- Mature singles and empty nesters; have lower levels of educational attainment and earn below average incomes

- Rejuvenators are family-oriented people who travel with others to escape from the stresses of everyday life, be pampered, and indulge themselves

- They are busy, family-oriented Canadians/Americans seeking a relaxing escape, typically within Canada and the US

- They enjoy sharing travel with others (friends or family) and prefer it to be a time for understated indulgence and relaxation, away from their burdens and responsibilities at home

Virtual Travellers

- Middle-aged families with lower levels of educational attainment; living outside of urban areas

- Virtual Travellers are highly reluctant travellers who travel only when they must, and typically just to visit friends or relatives

- For Virtual Travellers, travelling is a chore, not an experience to be enjoyed

- They are fearful of change and complexity in their lives and like to maintain control when travelling

- They are highly unlikely to venture far from home

NORTHERN VANCOUVER ISLAND

VISITOR SUMMARY

NORTHERN VANCOUVER ISLAND VISITOR SUMMARY
BRITISH COLUMBIA

WHO ARE THEY?

- Scenic Retirement was the top PRIZM segment across all communities in the non-local analysis for 2019.
- Country & Western was second across all except Regional District with Boomer Bliss. The top 3rd segment was different by community with Indigenous Families, Boomer Bliss, Savvy Seniors, and Suburban Recliners showing up.

The top EQ Types across all analyses were Rejuvenators, Gentle Explorers and Authentic Experiences. Northern Vancouver Island Profile is made up of Older, middle-income empty nesters (55+) and younger-middle-aged families. They enjoy participating in outdoor activities such as camping, hiking and fishing as well as having an interest in learning about cultures.

WHERE DID THEY COME FROM?

Local travel from within the Northern Vancouver Island communities is strong. Port Hardy and Port McNeill ranked as top visitor origin locations across all geo-coded locations in 2019 and 2020

Visitors from Campbell River, Nanaimo, Courtenay and Vancouver ranked within the top 7 locations across the multiple queries

WHAT DO THEY LIKE?

- Mix of Income levels, with older empty nesters having higher incomes, younger families with lower incomes.

- 24% above average compared to BC to NOT have Children at home. 43% of the households are couples

- Top Social Values: Attraction to Nature, Racial Fusion, Cultural Sampling

- Above Average Interest in: Visiting Parks/Gardens, Photography, Canoeing/Kayaking, Fishing/Hunting, Cross Country Skiing/Snowshoeing, Golf, Visiting Historical Sites

- 14hrs/week listening to the Radio, 22hrs/week watching TV, 1hr/week reading the Newspaper and 3.4hrs/day on the Internet. Daily Magazine usage is minimal (10min/day)
    - Above Average users of Radio and TV

Attraction to Nature

"How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life"

WHERE TO FIND MORE OF THEM

- North Vancouver
- Surrey
- Saanich
- Langley
- Coquitlam
- Abbotsord
- Prince George
- North Cowichan
- Parksville
- Nanaimo

- Vernon
- Chilliwack
- Qualicum Beach
- Kelowna
- Vernon
- Courtenay
- Summerland
- Saltspring Island
- Victoria

NORTHERN VANCOUVER ISLAND VISITOR SUMMARY
ALBERTA - FAMILY SEGMENTS

WHO ARE THEY?

- All-Terrain Families
- Family Mode
- Modern Suburbia
- The A-List
- Turbo Burbs

All of these Segments are at least 10% more likely than the general Alberta population to have Children living at home

The Alberta profile of the Northern Vancouver Island FAMILY visitor is made up of younger -middle-aged (45 years old and younger) wealthy families who tend to use nature as a means to escape their everyday lives. They enjoy family-friendly activities such as RV/Camping, outdoor sports, boating and group activities.

WHERE DID THEY COME FROM?

Calgary was the top visitor origin location of Alberta travellers in 2019 and 2020 by a substantial margin across all geo-fenced locations with Edmonton as a secondary market.

Visitors from Wood Buffalo, Strathcona County and Red Deer ranked within the top 7 locations across the multiple queries

WHAT DO THEY LIKE?

- Above Average Household Income of $174,716 compared to Alberta at $122,710

- 18% above average compared to Alberta to HAVE Children at home. 34% of the households have 2+ children

- Top Social Value: Need for Escape

  - Above Average Interest in: Cycling, Sporting Events, Hiking/Backpacking, Visiting National/Provincial Parks, Skating, Canoeing/Kayaking

- 12hrs/week listening to the Radio, 19hrs/week watching TV, 1hr/week reading the Newspaper and 4.1hrs/day on the Internet. Daily Magazine usage is minimal (6min/day)
  - Below Average users of Newspapers and Magazines

Need for Escape

"The desire to regularly escape the stress and responsibilities of everyday life"

WHERE TO FIND MORE OF THEM

- Calgary
- Edmonton
- Strathcona County
- Airdrie
- Red Deer
- St. Albert
- Wood Buffalo
- Grande Prairie
- Rocky View County
- Spruce Grove

NORTHERN VANCOUVER ISLAND VISITOR SUMMARY
ALBERTA - NON - FAMILY SEGMENTS

WHO ARE THEY?

- Country & Western
- Indigenous Families
- Mid-City Mellow
- New Country
- Stressed in Suburbia
- Suburban Sports

All of these Segments are at least 6% less likely than the general Alberta population to have Children living at home

The Alberta profile of the Northern Vancouver Island NON - FAMILY visitor is made up of middle-aged/mature (50 years old and older) mid-income singles and couples who enjoy being outside and are nearing retirement. They enjoy Swimming, Hiking, Golfing and also appreciate culture based activities

WHERE DID THEY COME FROM?

Calgary was the top visitor origin location of Alberta travellers in 2019 and 2020 by a substantial margin across all geo-fenced locations with Edmonton as a secondary market.

Visitors from Wood Buffalo, Strathcona County and Red Deer ranked within the top 7 locations across the multiple queries

WHAT DO THEY LIKE?

- Average Household Income of $114,015 compared to Alberta at $122,710

- 7% below average compared to Alberta to HAVE Children at home. 59% of the households are single or couples

- Top Social Value: Need for Escape

    - Above Average Interest in: Fishing/Hunting, ATV/Snowmobiling, Hockey

- 14hrs/week listening to the Radio, 20hrs/week watching TV, 1hr/week reading the Newspaper and 3.7hrs/day on the Internet. Daily Magazine usage is minimal (10min/day)
    - Above Average users of Magazines however usage is still minimal

Need for Escape

"The desire to regularly escape the stress and responsibilities of everyday life"

WHERE TO FIND MORE OF THEM

- Calgary
- Edmonton
- Red Deer
- Medicine Hat
- Wood Buffalo

- Lethbridge
- St. Albert
- Grande Prairie
- Strathcona County
- Airdrie

ADDITIONAL RESOURCES

ADDITIONAL REPORTS

Profile Details (Shared via Google Drive):

- Each EQ, PRIZM and Visitor Profile Includes 17 pages of detailed information:
  - Demographics
  - Key Social Values
  - Key Tourism Activities
  - Travel Profile (Vacation Booking, Vacation Spend etc.)
  - Traditional and Digital (Social) Media usage
 - Product Preferences
  - Internet Activity
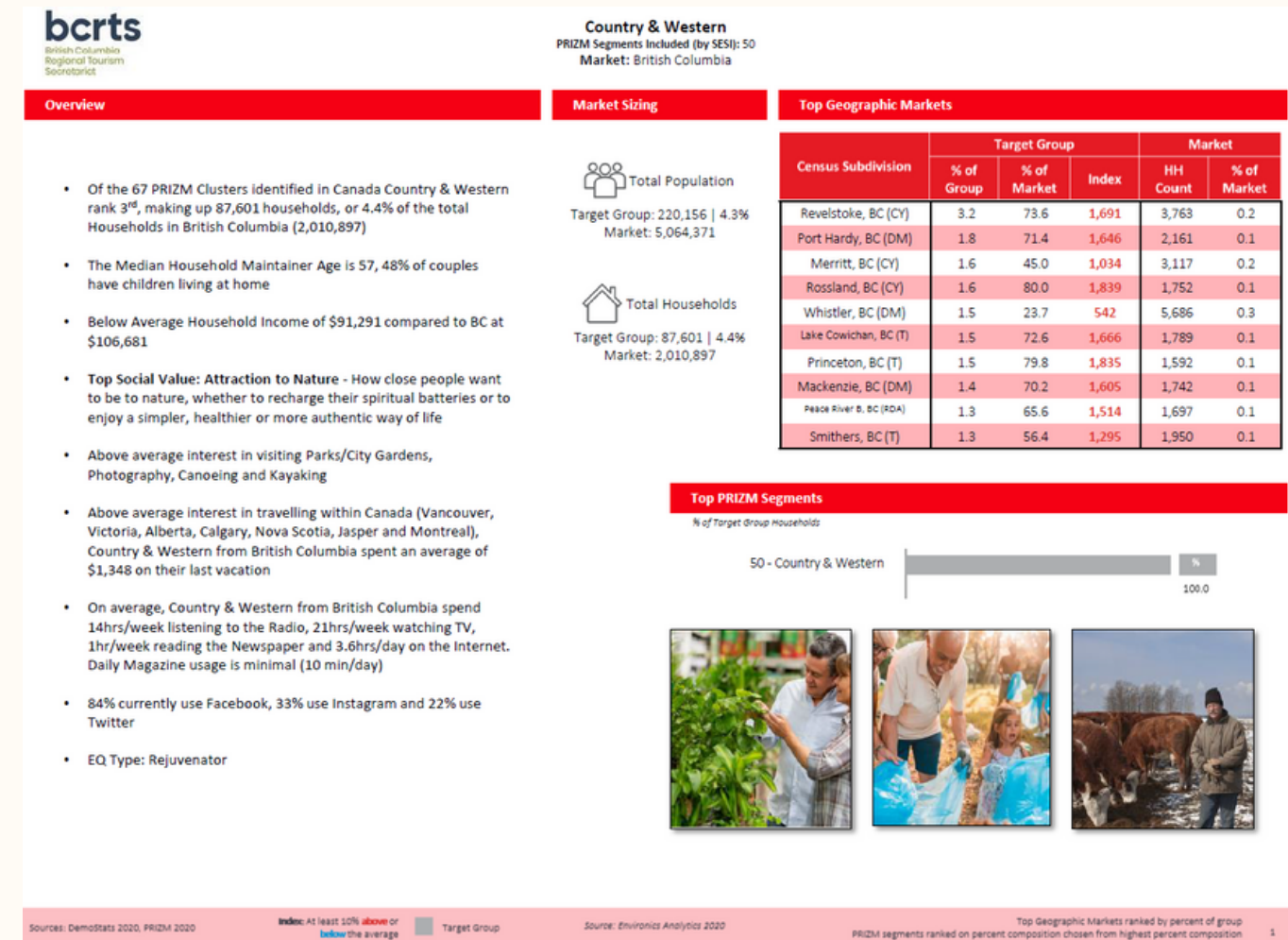
SUMMARY OF REPORTS

Project Deliverables:

- Alert Bay Area - Visitor Analysis Summary Report

- Alert Bay Area Profile by Area and Province (BC, Alberta)

- Top three Provincial Profiles by PRIZM Segment (BC, Alberta)

- Top three Provincial Profiles by EQ Type (BC, Alberta)

Profile Details:

- Each EQ, PRIZM and Visitor Profile Includes 17 pages of detailed information:
  - Demographics
  - Key Social Values
  - Key Tourism Activities
  - Travel Profile (Vacation Booking, Vacation Spend etc.)
  - Traditional and Digital (Social) Media usage
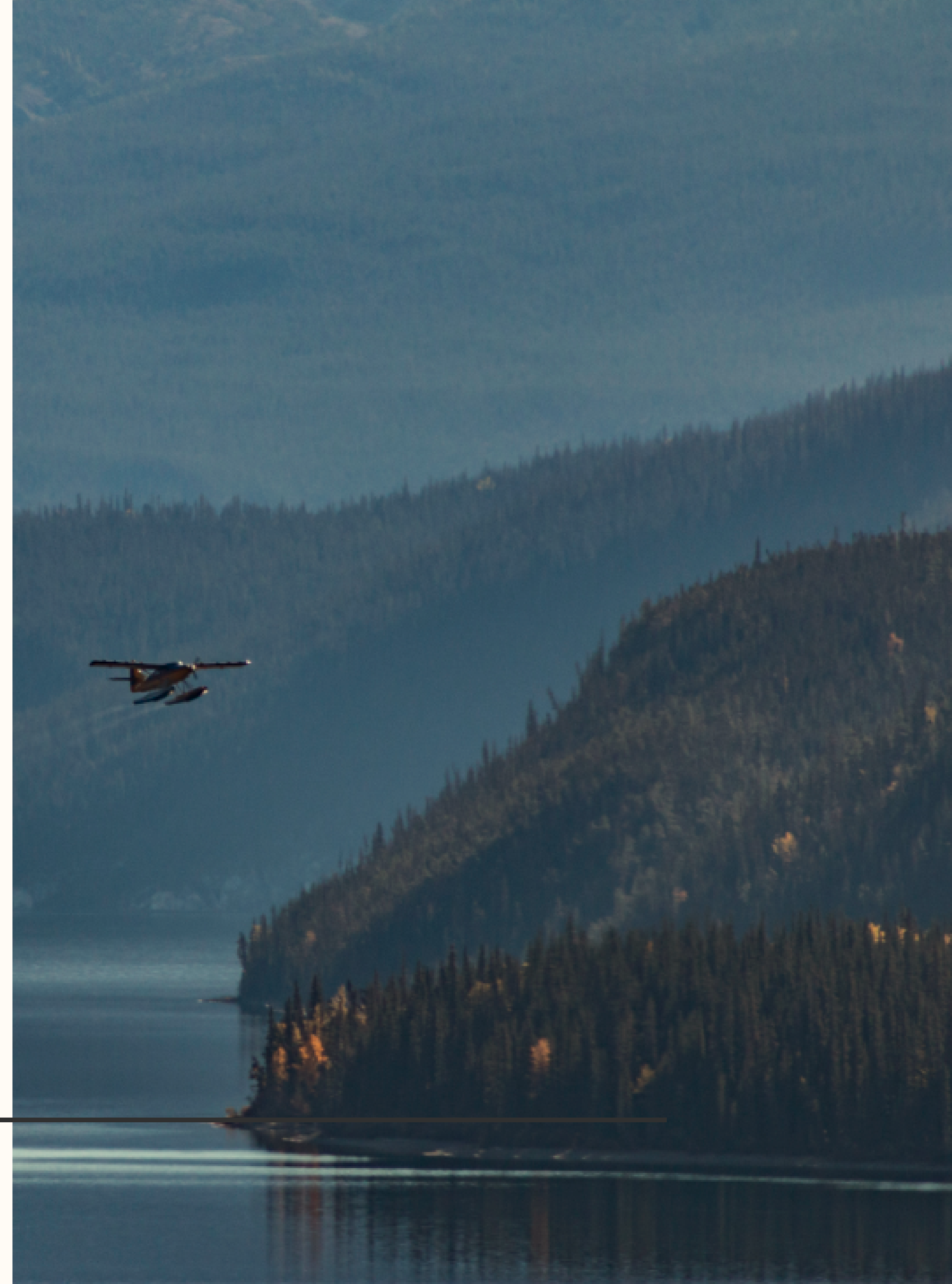 - Product Preferences
  - Internet Activity
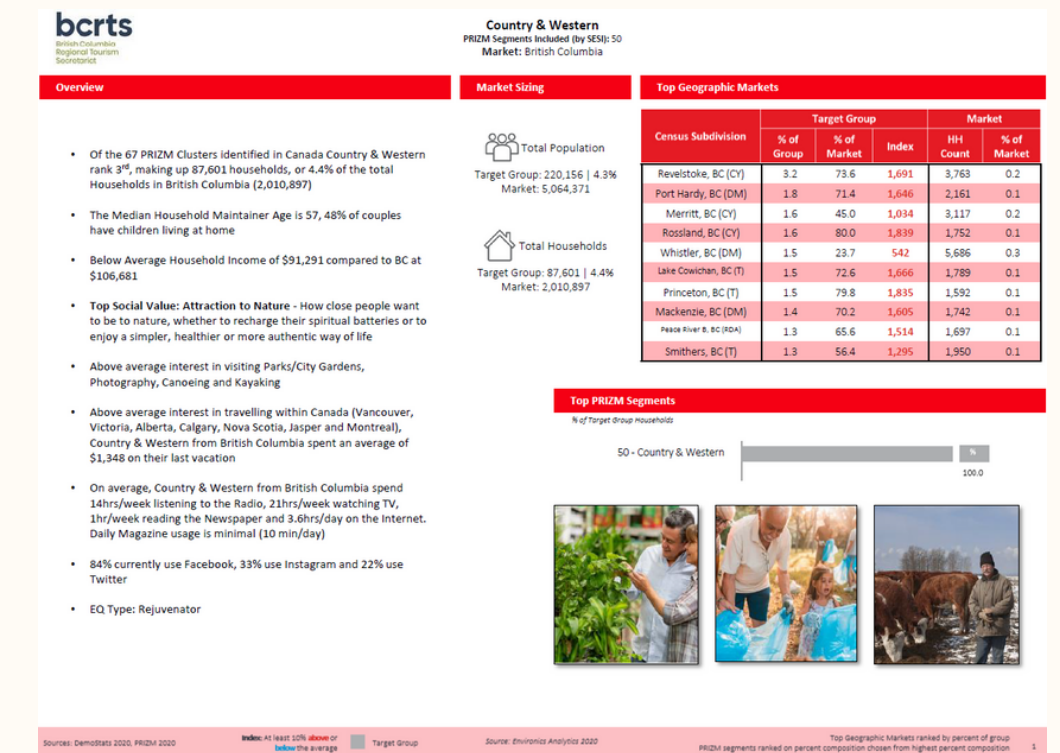
RESOURCES

Destination Canada - Explorer Quotient (EQ) Program

Environics Analytics

British Columbia - COVID-19

Thompson Okanagan Tourism Association - Research Spotlight

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