

SYMPHONY TOURISM SERVICES INSPIRED NAVIGATION



MOBILESCAPES RESEARCH INSIGHTS

Port Hardy Visitor Analysis

BRITISH COLUMBIA & ALBERTA VISITOR ANALYSIS

ABOUT TOTA THOMPSON OKANAGAN DURISM ASSOCIATION

- 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).
- 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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OBJECTIVES

INTRODUCTION

- market to?
- Segmentation profiles
- reaching your marketing goals

• 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

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

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

• 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

ABOUT ENVIRONICS ANALYTICS & PRIZM

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

<u>PRIZM</u> 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.



ENVIRONICS ANALYTICS



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

• <u>EQ TOOLKIT</u>

• EQ PROFILES

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

are

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



HOW CAN THESE INSIGHTS HELP YOU?

Identify Patterns	Develop Profiles
 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 Demographics Size Life Stage/Family Size Income Level Media Habits Activities/Interests

Product Development & Campaigns

- Use your Visitor Insights to create new products or ltineraries
- 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 locationenabled 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.

Port Hardy - 2019

Sample of **26,900** visitors analyzed from British Columbia Sample of **2,200** visitors analyzed from Alberta

Port Hardy - 2020

Sample of 23,300 visitors analyzed from British Columbia Sample of **1,100** visitors analyzed from Alberta

Port Hardy - 2019

Sample of **20,600** visitors analyzed from British Columbia * Local Residents from Port Hardy removed from Sample



Port Hardy - 2020

Sample of **17,800** visitors analyzed from British Columbia * Local Residents from Port Hardy removed from Sample

VISITOR ORIGIN

PROVINCIAL BREAKDOWN 2019 VISITORS

- On average 86% of visitors to the 5 geo-coded Port Hardy areas in 2019 were from British Columbia, 7% from Alberta and 3% from Ontario
- This report will focus on the British Columbia Market, followed by the Alberta Market
- Note: When Port Hardy was removed from the analysis, BC made up 83% and Alberta 9% of 2019 visitors



PROVINCIAL BREAKDOWN 2020 VISITORS

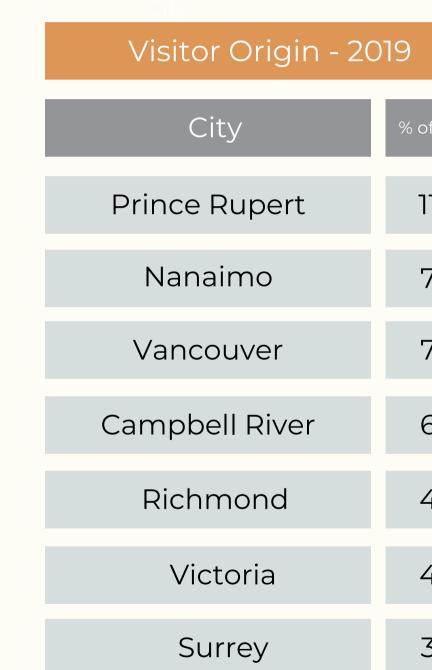
- On average 92% of visitors to the 5 geo-coded Port Hardy areas in 2020 were from British Columbia, 4% from Alberta and 2% from Ontario.
 Visitation from all other Provinces was minimal in 2020.
- This report will focus on the British Columbia Market, followed by the Alberta Market
- Note: When Port Hardy was removed from the analysis, BC made up 90% and Alberta 5% of 2020 visitors



VISITOR ORIGIN BY CITY BRITISH COLUMBIA

Key Findings

- Prince Rupert ranked as the top visitor origin location in 2019 and 2020 for the Port Hardy- Non-Local Analysis.
- Non-Northern Vancouver Island Visitation from Nanaimo and Campbell River ranked in the top 7 BC locations in 2019 and 2020.
- Non Island Visitation from Vancouver and Surrey ranked as top visitor origin locations in 2019 and 2020.



	Visitor Origin - 2020			
ofTotal	City	% of Total		
11%	Prince Rupert	8%		
7%	Vancouver	7%		
7%	Campbell River	6%		
6%	Surrey	5%		
4%	Courtenay	4%		
4%	Nanaimo	4%		
3%	Saanich	3%		

VISITOR ORIGIN BY CITY ALBERTA



	Visitor Origin - 2020			
of Total	City	% of Total		
32%	Calgary	20%		
17%	Strathcona County	13%		
8%	Irricana	9%		
6%	Lethbridge	9%		
5%	Edmonton	9%		
3%	Canmore	6%		
2%	Foothills No. 31	6%		

VISITOR INSIGHTS

KEY FINDINGS BC

Category	BC Visitors - 2019	BC Visi
Estimated Visitor Volume and %	• 20,600 or 83% were from BC	• 17,800 or 90% wer
Top Visitor Origin Locations	 Prince Rupert Nanaimo Saanich Saanich Vancouver Campbell River Richmond Victoria Surrey Port Edward 	 Prince Rupert Vancouver Campbell River Surrey Courtenay Nanaimo Saanich
Top PRIZM Segments	 Indigenous Families Country & Western Scenic Retirement Suburban Sports Suburban Recliners Keep on Trucking Just Getting By Boomer Bliss Savvy Seniors Down to Earth 	 Scenic Retirement Indigenous Families Boomer Bliss Suburban Sports Suburban Recliners
Top EQ Types	 Rejuvenators Gentle Explorers Personal History Explorers 	 Rejuvenators Gentle Explorers Authentic Experie

sitors - 2020

vere from BC

- Richmond
- Burnaby
- Esquimalt
- Comox
- Parksville
- Coquitlam
- Victoria
- Country & Western
- Keep on Trucking
- Just Getting By
- Family Mode
- Savvy Seniors

Key Findings

Key Findings comparing the full mobile analysis (including locals) to the analysis that does not include visitation from Port Hardy:

- The top 10 PRIZM Segments are consistent across both analyses, however; Suburban Recliners and Savvy Seniors also ranked in the secondary analysis (non-local) for 2019 and 2020
- The top three EQ Types are consistent across both years and analyses.

s riencers

KEY FINDINGS ALBERTA

Category	Alberta Visitors- 2019	Alberta Visitors- 2020
Estimated Visitor Volume and %	 2,200 or 7% were from Alberta 	 1,000 or 4% were from Alberta
Top Visitor Origin Locations	 Calgary Edmonton Strathcona County Wood Buffalo St. Albert Grande Prairie Brooks 	 Calgary Strathcona County Irricana Lethbridge Edmonton Canmore Foothills No. 31
Top PRIZM Segments	 Suburban Sports Family Mode Turbo Burbs Middle-Class Mosaic Modern Suburbia 	 The A-List Happy Medium Slow-Lane Suburbs Family Mode New Country
Top EQ Types	 Authentic Experiencers No Hassle Travellers Gentle Explorers 	 Rejuvenators Authentic Experiencers No Hassle Travellers

CURRENT VISITOR PROFILE BRITISH COLUMBIA & ALBERTA

BC Visitors - 2019	BC Visitors - 2020	Alberta Visi
 The Median Household Maintainer Age for British Columbian visitors (Non-Local) to the Port Hardy Geo- Fenced Areas in 2019 was 53, 33% of couples have children living at home 	 The Median Household Maintainer Age for British Columbian visitors (Non-Local) to the Port Hardy Geo- Fenced Areas in 2020 was 54, 33% of couples have children living at home 	• The Median Household Main visitors to the Port Hardy Geo was 43, 56% of couples have
 Average Household Income of \$104,094 compared to BC at \$106,681 	 Average Household Income of \$102,549 compared to BC at \$106,681 	 Above Average Household In compared to Alberta at \$122,
 Top Social Value: Need for Escape - The desire to regularly escape the stress and responsibilities of everyday life 	 Top Social Value: Need for Escape - The desire to regularly escape the stress and responsibilities of everyday life 	 Top Social Value: Need for Es regularly escape the stress as everyday life
 Key Activities: Reading, Gardening, Swimming, Camping. Above Average interest in ATV/Snowmobiling 	 Key Activities: Reading, Gardening, Swimming, Camping. Above Average interest in ATV/Snowmobiling 	 Key Tourism Activities:, Abov Swimming, Cycling, Attendir Hiking/Backpacking
• Average interest in travelling within Canada (Above Average for: Alberta), British Columbian visitors (Non- Local) to the Port Hardy Geo-Fenced Areas in 2019 spent an average of \$1,636 on their last vacation	• Average interest in travelling within Canada (Above Average for: Vancouver, Alberta), British Columbian visitors (Non-Local) to the Port Hardy Geo-Fenced Areas in 2020 spent an average of \$1,640 on their last vacation	 Average interest in travelling Average for: Banff, Calgary, V Manitoba, Toronto), Alberta v Geo-Fenced Areas in 2019 sp on their last vacation
 On average, British Columbian visitors (Non-Local) to the Port Hardy Geo-Fenced Areas in 2019 spent 13hrs/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 (9min/day) 	 On average, British Columbian visitors (Non-Local) to the Port Hardy Geo-Fenced Areas in 2020 spent 13hrs/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 (9min/day) 	 On average, Alberta visitors t Fenced Areas in 2019 spent 1 Radio, 19hrs/week watching Newspaper and 4.3hrs/day o Magazine usage is minimal (76% currently use Facebook,
 79% currently use Facebook, 38% use Instagram and 25% use Twitter 	 79% currently use Facebook, 37% use Instagram and 25% use Twitter 	above average) and 33% use average)

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sitors - 2019

Alberta Visitors - 2020

intainer Age for Alberta Geo-Fenced Areas in 2019 re children living at home

Income of \$151,159 22,710

Escape: The desire to and responsibilities of

ove Average interest in ding Sporting Events,

ng within Canada (Above , Vancouver, Jasper, Victoria, a visitors to the Port Hardy spent an average of \$1,552

s to the Port Hardy Geot 13hrs/week listening to the g TV, Ohr/week reading the on the Internet. Daily Il (6min/day)

ok, 44% use Instagram (14% se Twitter (14% above

- The Median Household Maintainer Age for Alberta visitors to the Port Hardy Geo-Fenced Areas in 2020 was 47, 49% of couples have children living at home
- Above Average Household Income of \$174,551 compared to Alberta at \$122,710
- Top Social Value: Need for Escape: The desire to regularly escape the stress and responsibilities of everyday life
- Key Tourism Activities: Camping, Swimming, Cycling, Above Average interest in Attending Sporting Events, Golf, Ice Skating, Canoeing/Kayaking
- Average interest in travelling within Canada (Above Average for: Banff, Calgary, Vancouver, Jasper), Alberta visitors to the Port Hardy Geo-Fenced Areas in 2020 spent an average of \$1,558 on their last vacation
- On average, Alberta visitors to the Port Hardy Geo-Fenced Areas in 2020 spent 13hrs/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)
- 77% currently use Facebook, 41% use Instagram and 31% use Twitter

KEY VARIABLE HIGHLIGHTS BRITISH COLUMBIA & ALBERTA

Variable	BC Visitors - 2019	BC Visitors - 2020	AB Visitors - 2019	AB Visitors - 2020
l am interested in learning about different cultures	62% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy learning about different cultures	62% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy learning about different cultures	54% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy learning about different cultures	56% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy learning about different cultures
I occasionally/regularly participate in Camping activities	54% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy camping activities	54% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy camping activities	62% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy camping activities	64% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy camping activities
I occasionally/regularly participate in Canoe/Kayaking activities	37% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy canoe/kayak activities	37% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy canoe/kayak activities	32% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy canoe/kayak activities	30% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy canoe/kayak activities
I occasionally/regularly participate in Fishing/Hunting activities	25% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy fishing/hunting activities	25% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy fishing/hunting activities	29% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy fishing/hunting activities	29% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy fishing/hunting activities
I occasionally/regularly participate Hiking/Backpacking activities	51% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy hiking/backpacking activities	51% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy hiking/backpacking activities	46% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy hiking/backpacking activities	43% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy hiking/backpacking activities
Attended/Visited [Pst Yr] - Local Attractions - National or provincial park	35% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy visiting local attractions - National/Provincial Parks	36% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy visiting local attractions - National/Provincial Parks	44% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy visiting local attractions - National/Provincial Parks	44% of the Visitors sampled within the Geo-fenced Port Hardy area enjoy visiting local attractions - National/Provincial Parks

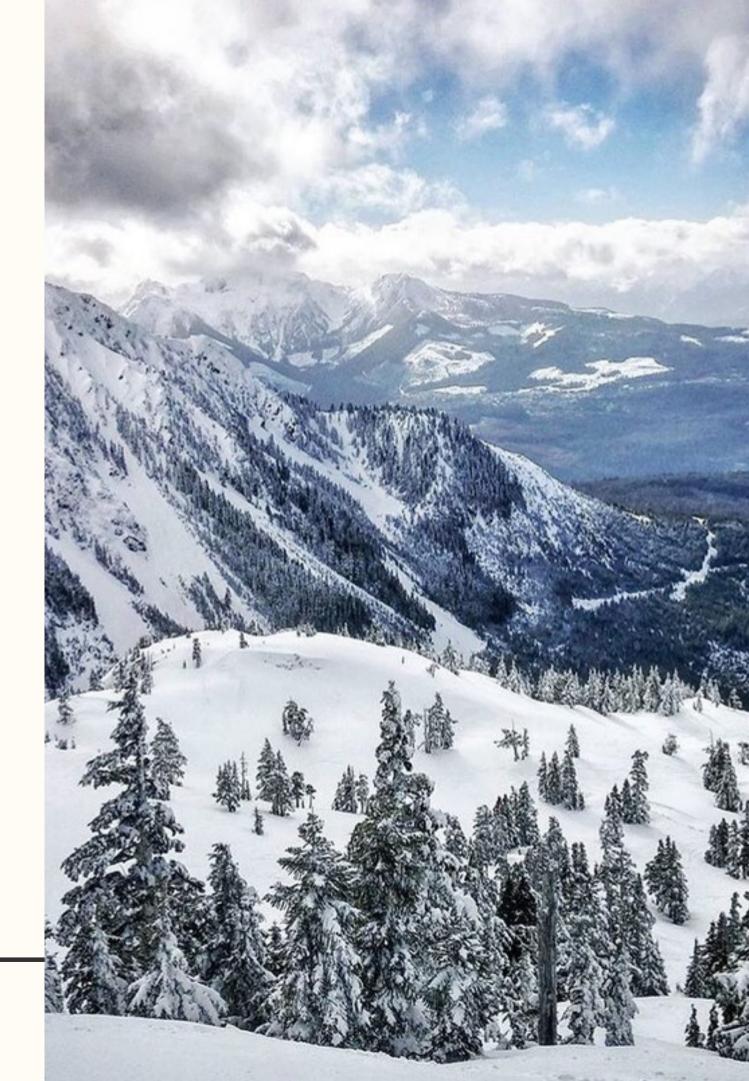
SUMMARY HIGHLIGHTS BRITISH COLUMBIA

- British Columbia was the primary origin of Port Hardy Area Visitors, making up 83% of visitation in 2019 and 90% in 2020
- Prince Rupert, Nanaimo and Vancouver were the top three visitor origin locations in 2019 and Prince Rupert, Vancouver and Campbell River were the top three in 2020
- The top three PRIZM Segments visiting the Port Hardy Area were Indigenous Families, Country & Western and Scenic Retirement were the top three in 2019 and Scenic Retirement, Indigenous Families and Boomer Bliss were the top three in 2020
 - Country & Western are typically middle aged, below average income travellers who enjoy: Snowmobiling, Hiking, Camping, Boating
 - Indigenous Families are younger and middle-aged First Nations, Inuit and Métis families. They are typically active adventurers, enjoying fishing, hunting and snowmobiling.
 - Scenic Retirement are typically older and more mature, middle-income suburbanites, who enjoy: Visiting Parks/City Gardens, Photography Canoeing and Kayaking
 - Boomer Bliss are typically older and mature, upper-middle-income suburbanites. They appreciate the arts (theatre, galleries) and outdoor activities such as golf and fishing.
- EQ Types of visitors from BC in 2019 Rejuvenators, Gentle Explorers and Personal History Explorers. The top three EQ Types in 2020 were: Rejuvenators, Gentle Explorers and Authentic Experiencers.



SUMMARY HIGHLIGHTS ALBERTA

- Alberta was the secondary origin location of Port Hardy Area Visitors (although visitor counts were still minimal), making up 7% of visitation in 2019 and 4% in 2020
- Calgary, Edmonton and Strathcona County were the top visitor origin markets in 2019. Calgary, Strathcona County and Irricana were the top visitor origin markets in 2020.
- The top three PRIZM Segments visiting Port Hardy Area in 2019 were Suburban Sports, Family Mode and Turbo Burbs. The top three in 2020 were the A-List, Happy Medium and Slow-Lane Suburbs
 - Suburban Sports are typically middle-aged couples and families (with children of all ages at home). They value community involvement and companies that treat their employees fairly
 - Family Mode are typically Middle-aged couples and families with children (ages 10+) at home. They value outdoor adventure and interacting with people from different cultures
 - Turbo Burbs are typically Middle-aged couples and families (with children ages 10-24 at home). They value products offered by companies that are good corporate citizens as well as small, local businesses.
 - 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 Value community involvement, cultural diversity and having a healthy lifestyle
 - Happy Medium are typically suburban, middle-income couples and families. They enjoy keeping up with the latest trends, boating and riding motorcycles
 - Slow-Lane Suburbs are typically older/mature suburban singles and couples. They enjoy golfing, theatre and food/wine festivals
- The top three EQ Types visiting the Port Hardy Area from Alberta in 2019 were Authentic Experiencers, No Hassle Travellers and Gentle Explorers. The top three in 2020 were Rejuvenators, Authentic Experiencers and No Hassle Travellers
- Alberta Visitors to the Port Hardy Area geo-fenced area tend to be younger and wealthier than BC Travellers to the Port Hardy Area. They tend to enjoy camping, swimming and cycling and Hiking/Backpacking at above average rates compared to Alberta and often use travel as a means for escape from everyday life.



INSIGHTS POTENTIAL GROWTH MARKETS

British Columbia	Alberta	Considera
 Vancouver Island Nanaimo, Campbell River, 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 (Prince Rupert, Port McNeill) These are loyal visitors who understand your products/services and visited in 2019 and 2020 Lower Mainland Visitors (Vancouver, Surrey, Richmond, Burnaby) Less frequent travellers looking for experiences that allow them to connect with nature and experience different outdoor activities 	 Calgary/Edmonton Loyal Visitors (Wealthier and more Family Oriented) who are looking to understand your products/services while reconnecting with Nature Visitor Origin locations differed by year 	 Consider targeting PRIZM Segments: Boomer Bliss Country & Weste Indigenous Fam Just Getting By Scenic Retireme Top 10 Locations of Segments: Nanaimo Kelowna Chilliwack Kamloops Abbotsford North Cowichan Vernon Saanich Prince George Courtenay

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COVID-19 Considerations

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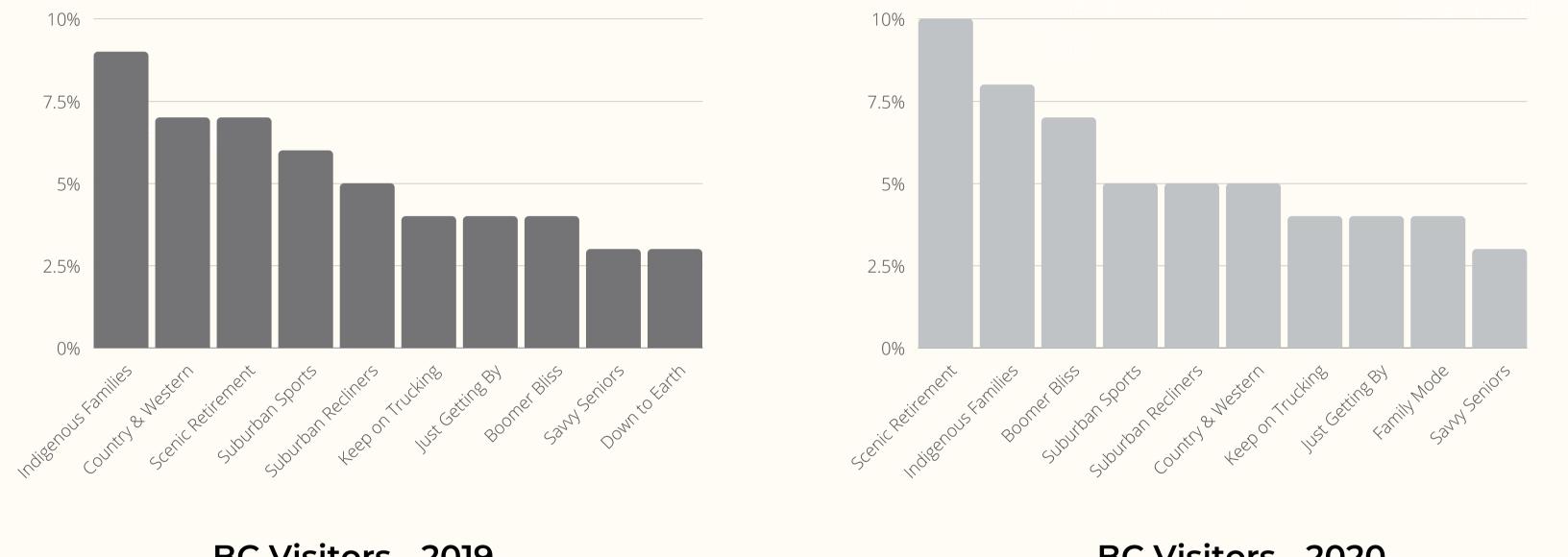
British Columbia announced a Provincial State of Emergency due to the COVID-19 Pandemic on March 18, 2020, Alberta announced on March 17, 2020

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 PORT HARDY AREA BY YEAR **BRITISH COLUMBIA**

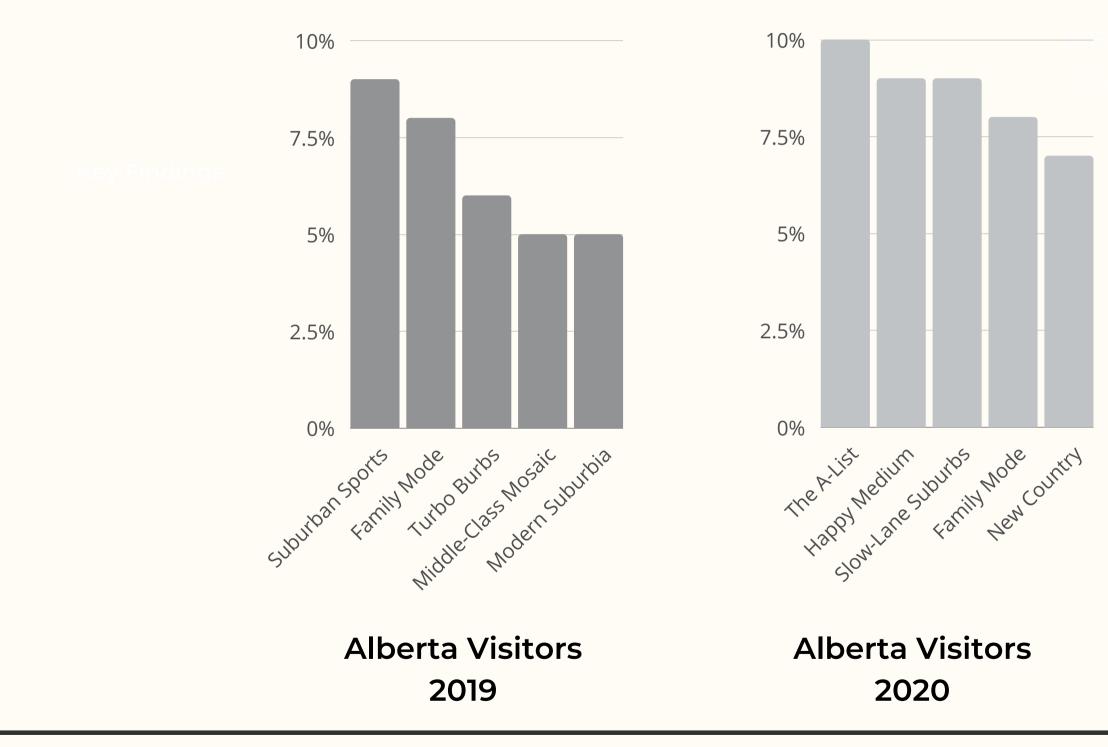


BC Visitors - 2019

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BC Visitors - 2020

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY BY YEAR ALBERTA



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2016 - Postal Codes

% of Total

- Postal Codes 2016 - Postal Codes

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY **BRITISH COLUMBIA MARKET**

Category	Country & Western	Indigenous Families	Scenic Retirement	Just Getting By
Household Count	 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 2nd by Household Count 94,025 households, or 4.7% of the total Households in BC 	 Rank 12th by Household Count 65,327 households, or 3.2% of the total Households in BC
Maintainer Age	52	54	64	51
% of Children at Home	47% of couples have children living at home	37% of couples have children living at home	39% of couples have children living at home	56% of couples have children living at home
Household Income	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	Average Household Income of \$100,586 compared to BC at \$106,681	•Below Average Household Income of \$62,460 compared to BC at \$106,681
Top Social Value	Racial Fusion	Attraction to Nature	Ethical Consumerism	Primacy of Environmental Protection
Social Media Habits	79% currently use Facebook, 36% use Instagram and 23% use Twitter	85% currently use Facebook, 35% use Instagram and 26% use Twitter	79% currently use Facebook, 30% use Instagram and 21% use Twitter	81% currently use Facebook, 35% use Instagram and 24% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY **BRITISH COLUMBIA MARKET**

Category	Suburban Sports	Boomer Bliss	Suburban Recliners	Savvy Seniors
Household Count	 Rank 1st by Household Count 123,442 households, or 6.1% of the total Households in BC 	123,442 households, or 6.1% of		 Rank 6th by Household Count 85,564 households, or 4.3% of the total Households in BC
Maintainer Age	52	62	60	60
% of Children at Home	47% of couples have children living at home			48% of couples have children living at home
Household Income	Above Average Household Income of \$120,592 compared to BC at \$106,681	Above Average Household Income of \$141,716 compared to BC at \$106,681	•Below Average Household Income of \$75,008 compared to BC at \$106,681	Average Household Income of \$104,131 compared to BC at \$106,681
Top Social Value	Racial Fusion	Racial Fusion Effort Toward Health		Culture Sampling
Social Media Habits	79% currently use Facebook, 36% use Instagram and 23% use Twitter	75% currently use Facebook, 32% use Instagram and 23% use Twitter	82% currently use Facebook, 32% use Instagram and 21% use Twitter	79% currently use Facebook, 36% use Instagram and 25% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY **ALBERTA MARKET**

Category	Suburban Sports	Family Mode	Turbo Burbs	Middle-Class Mosaic	Modern Suburbia
Household Count	 Rank 9th by Household Count 61,676 households, or 3.8% of the total Households in AB 	 Rank 7th by Household Count 64,272 households, or 3.9% of the total Households in AB 	 Rank 22nd by Household Count 36,645 households, or 2.1% of the total Households in AB 	 Rank 4th by Household Count 81,980 households, or 5% of the total Households in AB 	 Rank 1st by Household Count 123,489 households, or 7.5% of the total Households in AB
Maintainer Age	50	48	55	52	41
% of Children at Home	46% of couples have children living at home	54% of couples have children living at home	51% of couples have children living at home	47% of couples have children living at home	58% of couples have children living at home
Household Income	Average Household Income of \$136,314 compared to AB at \$125,945	Above Average Household Income of \$150,792 compared to AB at \$125,945	Above Average Household Income of \$225,242 compared to AB at \$125,945	Below Average Household Income of \$97,145 compared to AB at \$125,945	Above Average Household Income of \$141,199 compared to AB at \$125,945
Top Social Value	Racial Fusion	Need for Escape	Racial Fusion	Work Ethic	Confidence in Advertising
Social Media Habits	79% currently use Facebook, 35% use Instagram and 25% use Twitter	77% currently use Facebook, 39% use Instagram and 29% use Twitter	77% currently use Facebook, 36% use Instagram and 29% use Twitter	81% currently use Facebook, 40% use Instagram and 31% use Twitter	77% currently use Facebook, 48% use Instagram and 36% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY ALBERTA MARKET CONTINUED

Category	The A-List	Happy Medium	Slow-Lane Suburbs	New Country
Household Count	 Rank 28th by Household Count 23,972 households, or 1.5% of the total Households in AB 	 Rank 37th by Household Count 10,370 households, or 0.6% of the total Households in AB 	 Rank 36th by Household Count 10,423 households, or 0.6% of the total Households in AB 	 Rank 5th by Household Count 71,011 households, or 4.3% of the total Households in AB
Maintainer Age	57	53	55	55
% of Children at Home	55% of couples have children living at home	57% of couples have children living at home	53% of couples have children living at home	54% of couples have children living at home
Household Income	Above Average Household Income of \$466,483 compared to Alberta at \$125,945	Below Average Household Income of \$108,136 compared to Alberta at \$125,945	Below Average Household Income of \$90,965 compared to Alberta at \$125,945	Below Average Household Income of \$107,836 compared to AB at \$125,945
Top Social Value	Culture Sampling	Racial Fusion	National ride	Attraction to Nature
Social Media Habits	73% currently use Facebook, 38% use Instagram and 31% use Twitter	79% currently use Facebook, 34% use Instagram and 23% use Twitter	80% currently use Facebook, 34% use Instagram and 25% use Twitter	80% currently use Facebook, 31% use Instagram and 21% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY CANADIAN PRIZM SUMMARIES

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Boomer Bliss	Country & Western	Down to Earth	Fa
 Boomer Bliss are typically: Middle-aged couples and families with children (ages 10+) at home Enjoy: Visiting Parks/City Gardens Cycling Bars/Restaurants Value environmental protection and eco- friendly products 	 Country & Western are typically: Middle-aged Below-average income travellers Value outdoor experiences such as: Snowmobiling Hiking Camping Boating 	 Down to Earth are typically: Older, middleincome rural couples and families The majority of maintainers are over 55 years old enjoying average household incomes Enjoy: Fishing Hunting Bird-Watching Gardening 	Family I Midd and child hor Enjo 0 C 0 C 0 C 0 C 0 C 0 C 0 C 0 C

City %

15 - Postal Codes

2016 - Postal Codes

Family Mode

- Mode are typically:
- ddle-aged couples d families with ildren (ages 10+) at me
- joy:
- Camping
- Cycling
- Pilates and Yoga
- lue outdoor
- venture and
- eracting with
- ople from different
- tures

Happy Medium

Happy Medium are typically:

- Suburban, middleincome couples and families
- Enjoy:
 - Camping
 - Visiting Parks/City
 Gardens
 - Photography
- Enjoy home based activities such as sewing and woodworking as well as spectator sports and shopping at second hand stores

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY **CANADIAN PRIZM SUMMARIES CONTINUED**

Just Getting By Keep on Trucking Indigenous Families Middle-Class Mosaic Indigenous Families Just Getting By are Keep on Trucking are Middle-Class Mosaic are typically: typically: typically: are typically: • Younger, low-income • Middle-income urban • Upper=Middle Younger and city singles and families homeowners. More than income town middle-aged First a third of the population homeowners often Nations, Inuit and • Enjoy: are visible minorities located in rural Métis families • Visiting Parks/City communities Gardens • Eniov: • Nearly 95% of • Ice Skating • Adventure Sports • Tend to enjoy • Visiting Video residents are of outdoor activities Arcades/Indoor • Value leisure activities. Indigenous origin such as: **Amusement Centres** visiting chain • Boating • Hockey restaurants and Enjoy • ATVing keeping up to date on • Camping Snowmobiling • Value a mellow urban entertainment and • Visiting lifestyle doing yoga and celebrity gossip Parks/City reading entertainment Gardens and science magazines • Photography

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Modern Suburbia

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

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY CANADIAN PRIZM SUMMARIES CONTINUED

Savvy Seniors	Scenic Retirement	Slow-Lane Suburbs	Subur
Savvy Seniors are typically:Upper-Middle-income	Scenic Retirement are typically:	Slow-Lane Suburbs are typically:	Suburbai typically:
Seniors in Urban Apartments. Nearly 40% of maintainers are over 65	 Older and more mature, middle- income suburbanites 	 Older and mature suburban singles and couples 	 Subursingle many Empt
 Enjoy: Golf Camping Hiking Visiting Parks/City Gardens 	 Enjoy: Visiting Parks/City Gardens Photography Canoeing and Kayaking 	 Enjoy: Camping Visiting Parks/City Gardens Photography Value leisure-intensive 	 Enjoy Co Vis Na Pa Ca
 Value cultural activities, art galleries, the theatre and classical music concerts 	 Value traditional media and home-based hobby crafts 	lifestyles, casinos, community theatre, o beer/food/wine festivals	 Subursocial social prefer appro

016 - Postal Codes City % of T

urban Recliners

an Recliners are y:

urban downscale les and couples ny are retired oty-Nesters

by:

- Community Theatre
- Visiting
- National/Provincial
- Parks
- Casinos
- urban Recliners are
- ally progressive and
- fer a more casual
- roach to life

Suburban Sports

Suburban Sports are typically:

- Middle-aged couples and families
- Enjoy:
 - Camping
 - Fishing/Hunting
 - Cross CountrySkiing andSnowshoeing
- Value community involvement and companies that treat their employees fairly

TOP PRIZM SEGMENTS OF VISITORS TO PORT HARDY CANADIAN PRIZM SUMMARIES CONTINUED

The A-List	Turbo Burbs	Value Villagers
 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 	 Value Villagers are typically: Lower-middleincome city dwellers Below Average Household Income Enjoy: Cross Country Skiing Snowshoeing ATV and Snowmobiling

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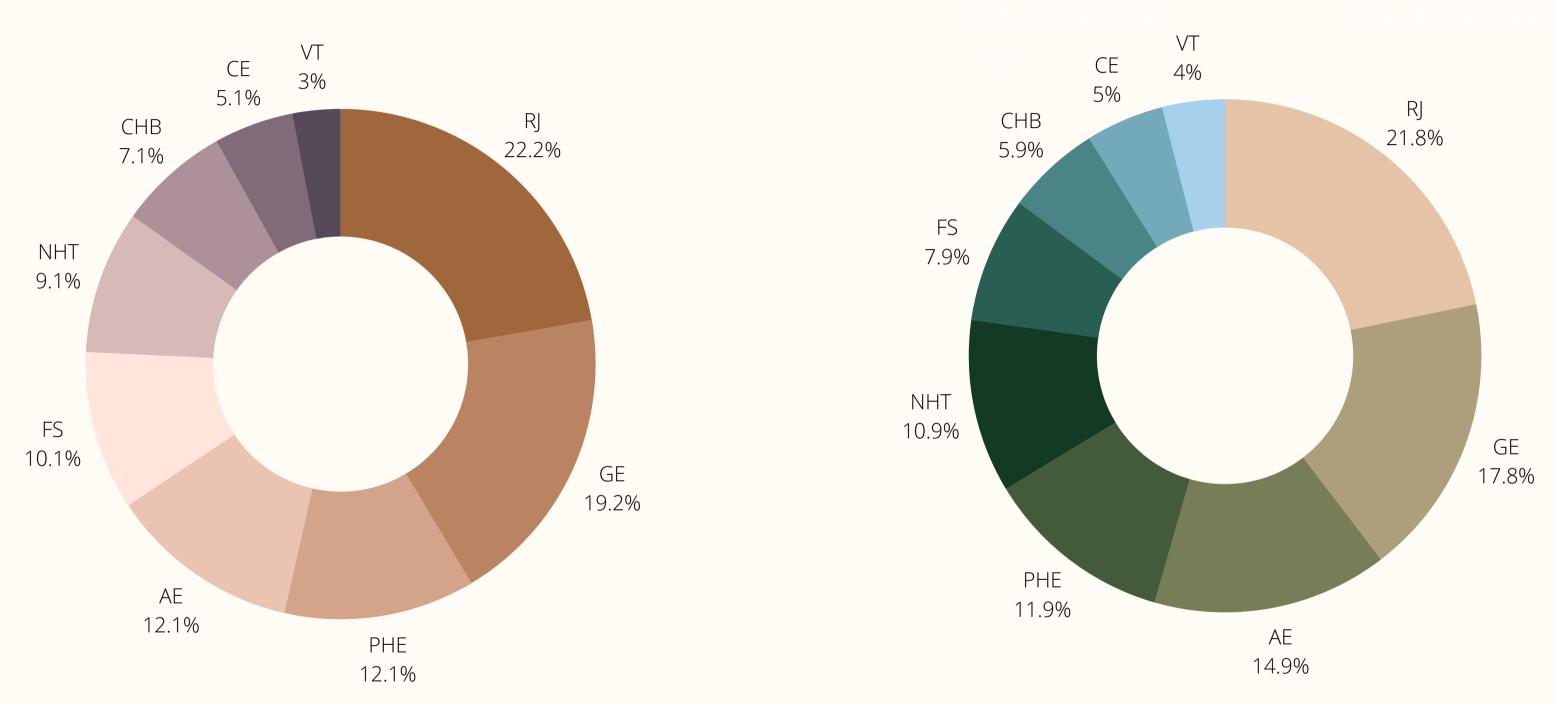
2016 - Postal Codes

City % of Total

2016 - Postal Codes

VISITOR PERSONAS EQ TYPES

TOP EQ TYPES OF VISITORS TO THE PORT HARDY AREA BY YEAR BRITISH COLUMBIA



BC Visitors Non-Local - 2019

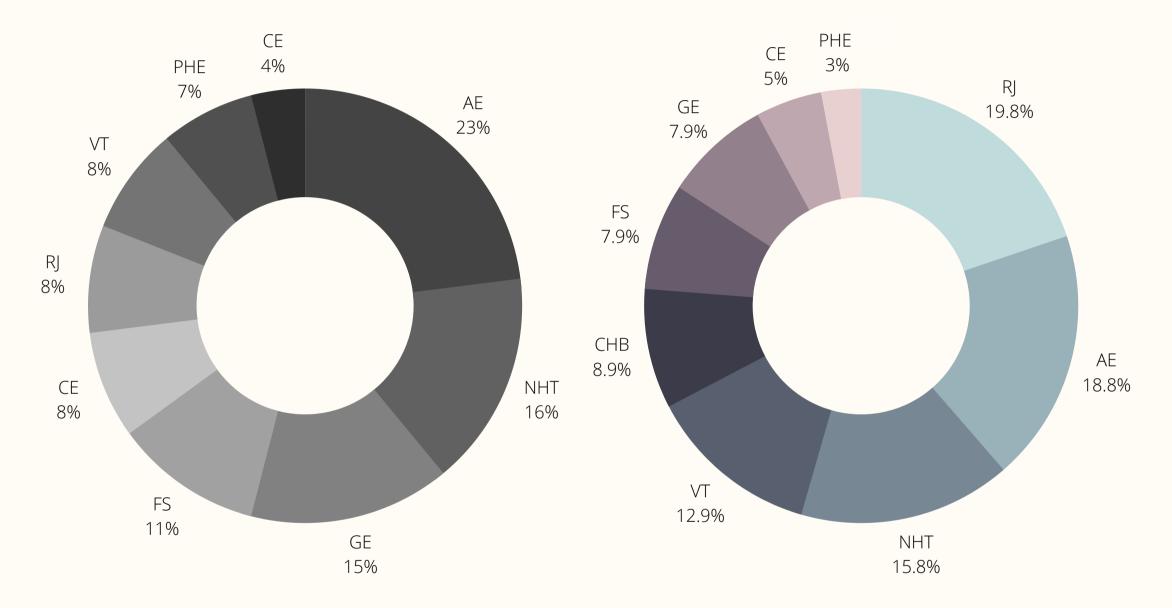
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Authentic Experiencers (AE) Cultural History Buffs (CHB) Cultural Explorers (CE)

BC Visitors Non-Local - 2020

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 PORT HARDY BY YEAR **ALBERTA**



Alberta Visitors - 2019

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

AB Visitors - 2020

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 PORT HARDY BRITISH COLUMBIA MARKET

Category	Rejuvenators	Gentle Explorers	Personal History 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 7th by Household Count 145,982 households, or 7.3% 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	54	59	
% of Children at Home	46% of couples have children living at home	47% 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	•Average Household Income of \$97,012 compared to BC at \$106,682	Above Average Household Income of \$152,393 compared to BC at \$106,681	
Top Social Value	Attraction to Nature	Racial Fusion	Ecological Fatalism	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, 40% use Instagram and 24% use Twitter	76% currently use Facebook, 34% use Instagram and 25% use Twitter	

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TOP EQ TYPES OF VISITORS TO PORT HARDY ALBERTA MARKET

Category	Authentic Experiencers	No Hassle Travellers	Gentle Explorers	Rejuvenators	
Household Count	 Rank 3rd by Household Count 207,086 households, or 12.6% of the total Households in AB 	 Rank 8th by Household Count 199,715 households, or 12.1% of the total Households in AB 	 Rank 5th by Household Count 199,412 households, or 12.1% of the total Households in AB 	 Rank 3rd by Household Count 237,088 households, or 14.4% of the total Households in AB 	
Maintainer Age	57	51	50	55	
% of Children at Home	49% of couples have children living at home	48% of couples have children living at home	41% of couples have children living at home	54% of couples have children living at home	
Household Income	Above Average Average Household Income of \$211,249 compared to AB at \$125,945	Average Household Income of \$118,008 compared to AB at \$125,945	Below Average Household Income of \$104,079 compared to AB at \$125,945	Below Average Household Income of \$110,045 compared to AB at \$125,945	
Top Social Value	Culture Sampling	Need for Escape	Racial Fusion	Attraction to Nature	
Social Media Habits	76% currently use Facebook, 37% use Instagram and 30% use Twitter	79% currently use Facebook, 38% use Instagram and 29% use Twitter	80% currently use Facebook, 36% use Instagram and 26% use Twitter	80% currently use Facebook, 32% use Instagram and 22% use Twitter	

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TOP EQ TYPES OF VISITORS TO PORT HARDY CANADIAN EQ SUMMARIES

Rejuvenators

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

Gentle Explorers

- Middle-class families with children at home; higher rates of 4+ persons at home; below average rates of travel
- Gentle Explorers are primarily defined by their reluctance to venture far beyond the comfort of home
- They travel 'on condition', demanding the very best and most comfortable environments for themselves when they must do so
- They are apprehensive travellers who prefer the tried and true over discovering new destinations and cultures
- They prefer creature comforts and the security of group travel
- Travel is an opportunity to act more vividly and spontaneously than when at home

Personal History Explorer

- 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

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15 - Postal Codes

2016 - Postal Codes City % of Total

Authentic Experiencers

• Affluent, highly educated mature singles and couples with older children; living in urban and suburban neighbourhoods

• 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

• Tend to be older, highly educated and adventurous

• Relish experiencing all their travel destination has to offer in a reserved and non-exorbitant way

• Drawn to nature and are likely to seek it out far and wide

• Travel is an important part of their lives, so they are likely to go often and for a while

No Hassle Travellers

- Mature singles and couples, without children at home, who are in or nearing retirement
- No-Hassle Travellers are cautious, dutiful and reserved people who seek secure group travel that allows them to escape from the duties and obligations of everyday life
- Average Canadians/Americans leading busy lives, understated and cautious with spending money
- Favour nature and worry-free vacations, but also enjoy the cultural highlights of their destinations
- Prefer quiet weekend getaways close to 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.

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 Value: Attraction to Nature
- 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"

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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

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.

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"

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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

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

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

The Alberta profile of the Northern Vancouver Island NON - FAMILY visitor is made up of middleaged/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

Need for Escape

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

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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

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

bcrts

- Of the 67 PRIZM Clusters identified in Canada Country & Western rank 3rd, making up 87,601 households, or 4.4% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 57, 48% of couples have children living at home
- Below Average Household Income of \$91,291 compared to BC at \$106.681
- Top Social Value: 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
- Above average interest in visiting Parks/City Gardens, Photography, Canoeing and Kayaking
- Above average interest in travelling within Canada (Vancouver Victoria, Alberta, Calgary, Nova Scotia, Jasper and Montreal), Country & Western from British Columbia spent an average of \$1,348 on their last vacation
- · On average, Country & Western from British Columbia spend 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 (10 min/day)
- 84% currently use Facebook, 33% use Instagram and 22% use Twitter
- EQ Type: Rejuvenator

Country & Western PRIZM Segments Included (by SESI): 50 Market: British Columbia

Market Sizing	Top Geographic Markets							
		Target Group			Market			
COC Total Population	Census Subdivision	% of Group	% of Market	Index	HH Count	% of Market		
Target Group: 220,156 4.3%	Revelstoke, BC (CY)	3.2	73.6	1,691	3,763	0.2		
Market: 5,064,371	Port Hardy, BC (DM)	1.8	71.4	1,646	2,161	0.1		
	Merritt, BC (CY)	1.6	45.0	1,034	3,117	0.2		
<i>i i i i i i i i i i</i>	Rossland, BC (CY)	1.6	80.0	1,839	1,752	0.1		
Total Households	Whistler, BC (DM)	1.5	23.7	542	5,686	0.3		
Target Group: 87,601 4.4%	Lake Cowichan, BC (T)	1.5	72.6	1,666	1,789	0.1		
Market: 2,010,897	Princeton, BC (T)	1.5	79.8	1,835	1,592	0.1		
	Mackenzie, BC (DM)	1.4	70.2	1,605	1,742	0.1		
	Peace River B, BC (RDA)	1.3	65.6	1,514	1,697	0.1		
	Smithers, BC (T)	1.3	56.4	1,295	1,950	0.1		

Top PRIZM Segn % of Target Group Household

50 - Country & Western



Index: At least 10% above or Target Group. Source: Environics Analytics 2020

Top Geographic Markets ranked by percent of group PRI2M segments ranked on percent composition chosen from highest percent composition

SUMMARY OF REPORTS

Project Deliverables:

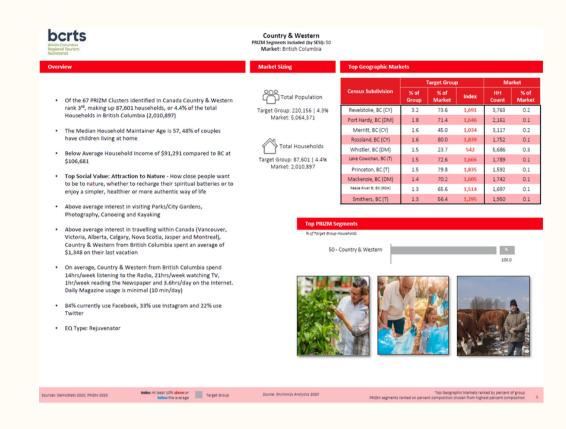
- Port Hardy Area Visitor Analysis Summary Report
- Port Hardy Area Profile by Area and Province (BC, Alberta)
- Top three Provincial Profiles by PRIZM Segment (BC, Alberta)
- Top three Provincial Profiles by EQ Type (BC, Alberta)

Profile Details:

- pages of detailed information:
 - Demographics
 - Key Social Values
 - Key Tourism Activities
 - etc.)

 - Product Preferences
 - Internet Activity

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Each EQ, PRIZM and Visitor Profile Includes 17

Travel Profile (Vacation Booking, Vacation Spend

Traditional and Digital (Social) Media usage

RESOURCES

<u>Destination Canada - Explorer Quotient (EQ)</u> <u>Program</u>

Environics Analytics

British Columbia - COVID-19

<u>Thompson Okanagan Tourism Association -</u> <u>Research Spotlight</u>

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SYMPHONY TOURISM SERVICES

INSPIRED NAVIGATION