

March 2021



**SYMPHONY
TOURISM
SERVICES**
INSPIRED NAVIGATION

MOBILESCAPES RESEARCH INSIGHTS



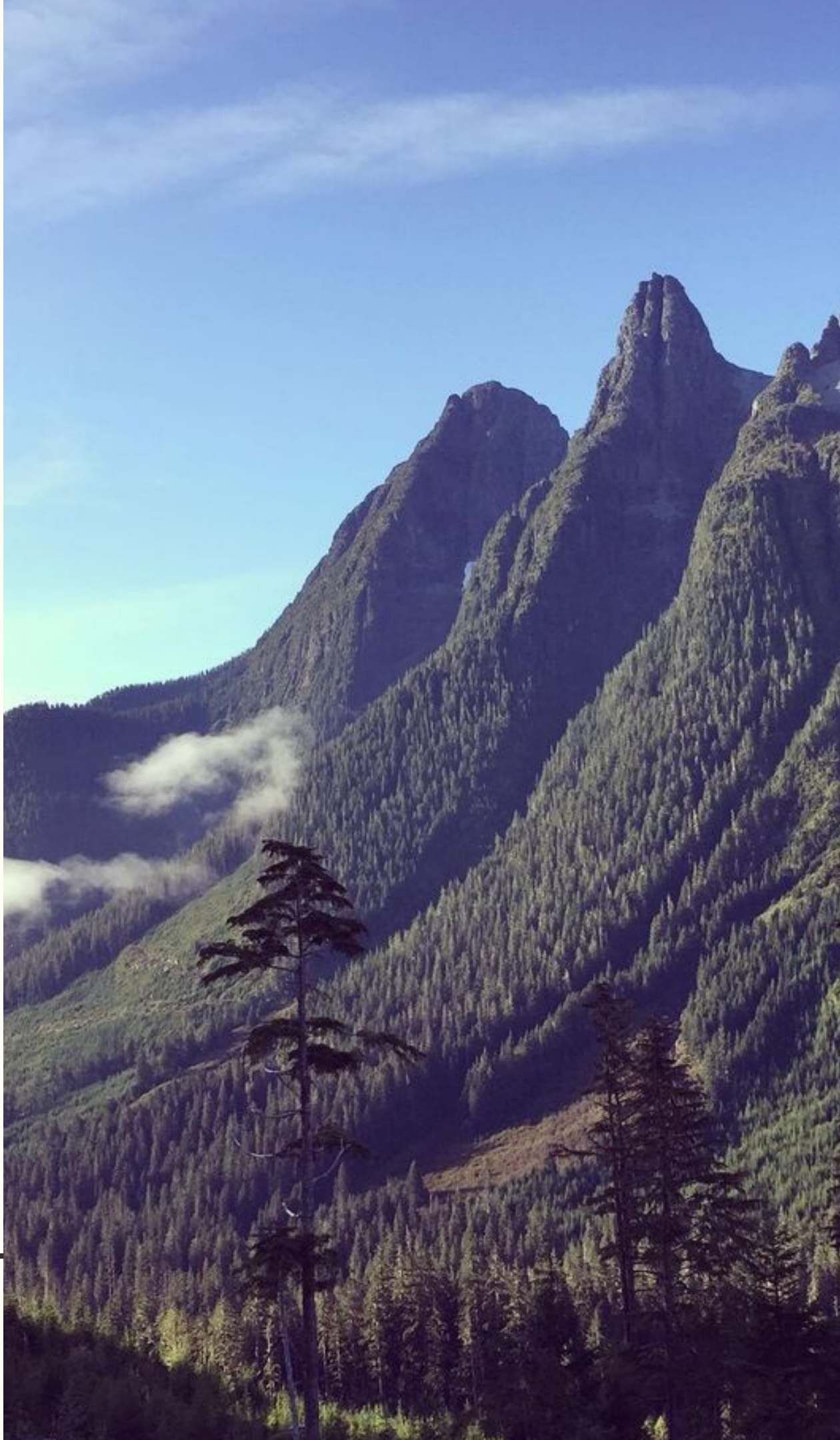
**Northern Vancouver
Island**

**Regional District Visitor
Analysis**

BRITISH COLUMBIA & ALBERTA VISITOR ANALYSIS

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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
- This Visitor Analysis profiles Mobile Movement Data for key locations within the Regional District of Mount Waddington 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

INTRODUCTION

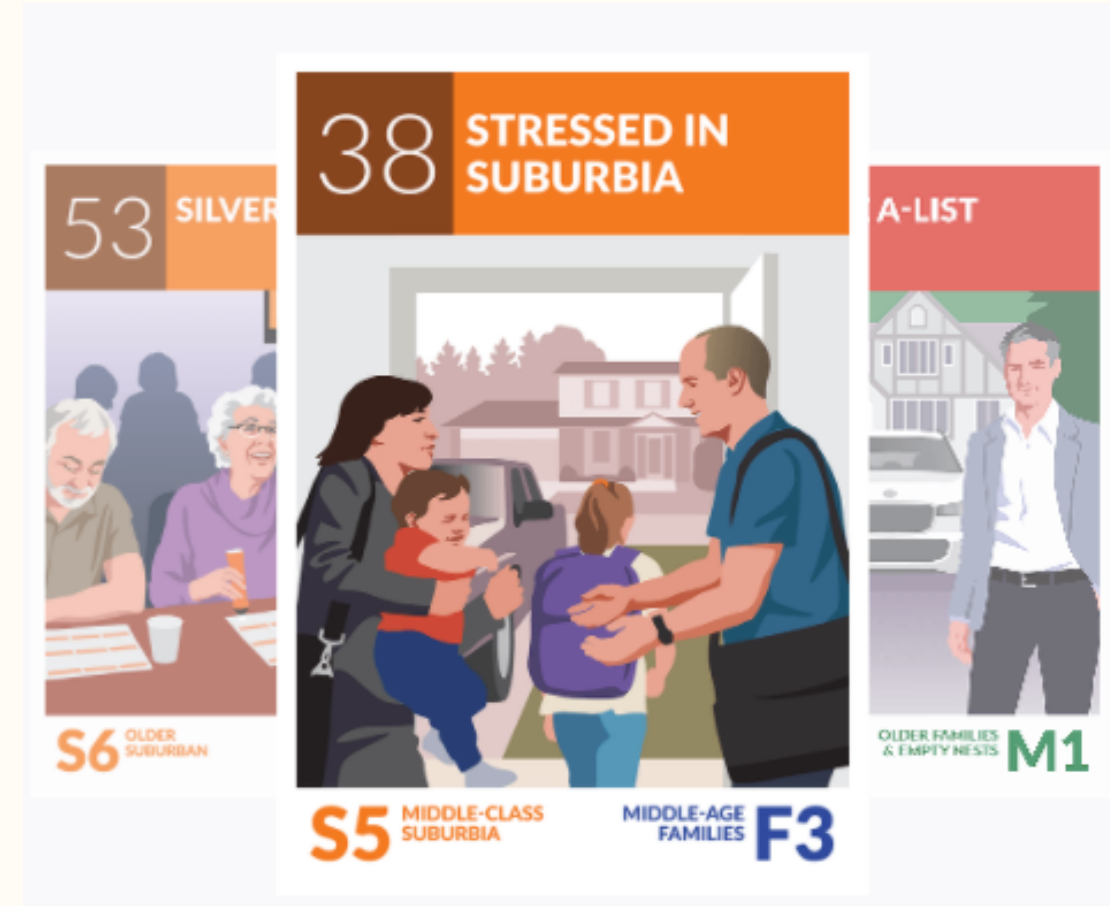
ABOUT ENVIRONICS

[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.

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

- [EQ TOOLKIT](#)
- [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

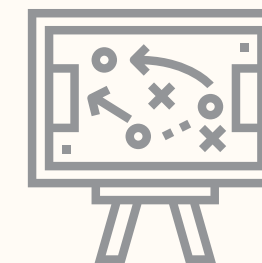
Identify **WHO** visits your location, **WHAT** they like (Activities/Media Habits) and **WHERE** more people like them are



Understand your Visitors



Identify Top Markets



Execute your Strategy

HOW TO USE MOBILESCAPES

HOW CAN THESE INSIGHTS HELP YOU?

Identify Patterns

- Use Visitor Volume estimates to identify fluctuations/changes in visitation by month/season/year
- COVID-19 Patterns

Develop Profiles

- Visitor Profiles developed to help you understand your visitors
 - Demographics
 - Psychographics
 - Life Stage/Family Size
 - Income Level
 - Media Habits
 - Activities/Interests

Product Development & Campaigns

- 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.



Regional District Area - 2019

Sample of **13,200** visitors analyzed from British Columbia
Sample of **700** visitors analyzed from Alberta



Regional District Area - 2020

Sample of **12,100** visitors analyzed from British Columbia
Sample of **200** visitors analyzed from Alberta



Regional District Area - 2019

Sample of **9,000** visitors analyzed from British Columbia

** Local Residents from Mount Waddington and Port Alice removed from Sample*



Regional District Area - 2020

Sample of **8,500** visitors analyzed from British Columbia

** Local Residents from Mount Waddington and Port Alice removed from Sample*

VISITOR INSIGHTS

KEY FINDINGS

BC

Category	BC Visitors - 2019	BC Visitors - 2020	Key Findings
Estimated Visitor Volume and %	<ul style="list-style-type: none"> 9,000 or 89% were from BC 	<ul style="list-style-type: none"> 8,500 or 95% were from BC 	<p>Key Findings comparing the full mobile analysis (including locals) to the analysis that does not include visitation from Mount Waddington or Port Alice:</p> <ul style="list-style-type: none"> The top 10 PRIZM Segments are consistent across both analyses, however; Suburban Recliners and Friends and Roomies also ranked in the secondary analysis (non-local) for 2019. Country Traditions and Suburban Sports ranked in the secondary analysis (non-local) for 2020. Authentic Experiencers replaced Virtual Travellers as one of the top three EQ Types in 2019 and 2020.
Top Visitor Origin Locations	<ul style="list-style-type: none"> Campbell River Nanaimo Saanich Comox Victoria Courtenay Squamish Surrey North Black Creek Burnaby Port Alberni Vancouver Central Saanich 	<ul style="list-style-type: none"> Campbell River Courtenay Nanaimo Vancouver Esquimalt Surrey Comox Saanich Port Alberni Victoria Squamish Richmond North Vancouver Colwood 	
Top PRIZM Segments	<ul style="list-style-type: none"> Scenic Retirement Country & Western Slow-Lane Suburbs Boomer Bliss Just Getting By Suburban Sports Suburban Recliners Down to Earth Friends & Roomies Indigenous Families 	<ul style="list-style-type: none"> Scenic Retirement Boomer Bliss Savvy Seniors Slow-Lane Suburbs Country Traditions Suburban Sports Country & Western Down to Earth Just Getting By Backcountry Boomers 	
Top EQ Types	<ul style="list-style-type: none"> Rejuvenators Gentle Explorers Authentic Experiencers 	<ul style="list-style-type: none"> Rejuvenators Authentic Experiencers Gentle Explorers 	

KEY FINDINGS

ALBERTA

Category	Alberta Visitors- 2019	Alberta Visitors- 2020
Estimated Visitor Volume and %	<ul style="list-style-type: none"> • 700 or 5% were from Alberta 	<ul style="list-style-type: none"> • 200 or 2% were from Alberta
Top Visitor Origin Locations	<ul style="list-style-type: none"> • Calgary • Wood Buffalo <p>Visitation from Alberta was very limited in 2019</p>	<ul style="list-style-type: none"> • Calgary • Edmonton <p>Visitation from Alberta was very limited in 2020</p>
Top PRIZM Segments	<ul style="list-style-type: none"> • New Country • Suburban Sports • Savvy Seniors • Indigenous Families • Stressed in Suburbia 	<ul style="list-style-type: none"> • Mature & Secure • Mid-City Mellow • Social Networkers • All-Terrain Families • Modern Suburbia
Top EQ Types	<ul style="list-style-type: none"> • Gentle Explorers • Rejuvenators • Authentic Experiencers 	<ul style="list-style-type: none"> • Personal History Explorers • Free Spirits • Authentic Experiencers

CURRENT VISITOR PROFILE

BC

BC Visitors (Non Local) - 2019

- The Median Household Maintainer Age for British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2019 was 56, 32% of couples have children living at home
- Average Household Income of \$98,829 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, Camping. Above Average interest in Cross Country Skiing/Snowshoeing
- Above Average interest in travelling within Canada (Vancouver, Alberta (Calgary, Jasper), British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2019 spent an average of \$1,630 on their last vacation
- On average, British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2019 spent 14hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.5hrs/day on the Internet. Daily Magazine usage is minimal (9min/day)
- 79% currently use Facebook, 34% use Instagram and 23% use Twitter. 12% above average use of Pinterest
- 59% of British Columbian visitors(Non-Local) to the Regional District Geo-Fenced Areas in 2019 tend to access social media on their mobile phones during the morning hours, 57% during the afternoon hours
- 7% seek recommendations for Vacation/Travel Information via social media (Below Average)
- 88% believe that Social media companies should not be allowed to own or share their personal information
- British Columbian visitors(Non-Local) to the Regional District Geo-Fenced Areas in 2019 are private about sharing their personal information online

BC Visitors (Non Local) - 2020

- The Median Household Maintainer Age for British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2020 was 55, 31% of couples have children living at home
- Average Household Income of \$104,385 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, Camping. Above Average interest in Cross Country Skiing/Snowshoeing, golfing, fishing/hunting
- Above Average interest in travelling within Canada (Vancouver, Victoria, Alberta (Calgary, Jasper) Nova Scotia), British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2020 spent an average of \$1,670 on their last vacation
- On average, British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2020 spent 14hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.5hrs/day on the Internet. Daily Magazine usage is minimal (9min/day)
- 78% currently use Facebook, 35% use Instagram and 24% use Twitter. 10% above average use of Pinterest
- 59% of British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2020 tend to access social media on their mobile phones during the morning hours, 58% during the afternoon hours
- 7% seek recommendations for Vacation/Travel Information via social media (Below Average)
- 88% believe that Social media companies should not be allowed to own or share their personal information
- British Columbian visitors (Non-Local) to the Regional District Geo-Fenced Areas in 2020 are private about sharing their personal information online

CURRENT VISITOR PROFILE

ALBERTA

Alberta Visitors - 2019

- The Median Household Maintainer Age for Alberta visitors to the Regional District Geo-Fenced Areas in 2019 was 45, 54% of couples have children living at home
- Average Household Income of \$137,734 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, Visiting National/Provincial Parks and Zoos/Aquariums
- Average interest in travelling within Canada (Above Average for: Banff, Calgary, BC, Jasper, Manitoba), Alberta visitors to the Regional District Geo-Fenced Areas in 2019 spent an average of \$1,459 on their last vacation
- On average, Alberta visitors to the Regional District Geo-Fenced Areas in 2019 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)
- 79% currently use Facebook, 41% use Instagram and 32% use Twitter

Alberta Visitors - 2020

- The Median Household Maintainer Age for Alberta visitors to the Regional District Geo-Fenced Areas in 2020 was 41, 51% of couples have children living at home
- Average Household Income of \$122,104 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, Cycling, Above Average interest in Swimming, Attending Sporting Events, Hiking/Backpacking and Visiting National/Provincial Parks
- Average interest in travelling within Canada (Above Average for: Banff, BC, Calgary, Jasper, Vancouver), Alberta visitors to the Regional District Geo-Fenced Areas in 2020 spent an average of \$1,555 on their last vacation
- On average, Alberta visitors to the Regional District Geo-Fenced Areas in 2020 spent 12hrs/week listening to the Radio, 18hrs/week watching TV, 0hr/week reading the Newspaper and 4.6hrs/day on the Internet. Daily Magazine usage is minimal (5min/day)
- 78% currently use Facebook, 45% use Instagram (17% above average) and 23% use Twitter (13% above average)

KEY VARIABLE HIGHLIGHTS

BC

Variable	BC Visitors - 2019	BC Visitors - 2020
I am interested in learning about different cultures	62% of the Visitors sampled within the Geo-fenced Regional District area enjoy learning about different cultures	63% of the Visitors sampled within the Geo-fenced Regional District area enjoy learning about different cultures
I occasionally/regularly participate in Camping activities	55% of the Visitors sampled within the Geo-fenced Regional District area enjoy camping activities	54% of the Visitors sampled within the Geo-fenced Regional District area enjoy camping activities
I occasionally/regularly participate in Whale Watching activities	11% of the Visitors sampled within the Geo-fenced Regional District area enjoy Whale Watching activities	10% of the Visitors sampled within the Geo-fenced Regional District area enjoy Whale Watching activities
I occasionally/regularly participate in Fishing/Hunting activities	27% of the Visitors sampled within the Geo-fenced Regional District area enjoy fishing/hunting activities	26% of the Visitors sampled within the Geo-fenced Regional District area enjoy fishing/hunting activities
I occasionally/regularly participate in Hiking/Backpacking activities	52% of the Visitors sampled within the Geo-fenced Regional District area enjoy hiking/backpacking activities	52% of the Visitors sampled within the Geo-fenced Regional District area enjoy hiking/backpacking activities
I occasionally/regularly participate in Swimming activities	60% of the Visitors sampled within the Geo-fenced Regional District area enjoy swimming activities	61% of the Visitors sampled within the Geo-fenced Regional District area enjoy swimming activities

KEY VARIABLE HIGHLIGHTS

ALBERTA

Variable	AB Visitors - 2019	AB Visitors - 2020
I am interested in learning about different cultures	55% of the Visitors sampled within the Geo-fenced Regional District area enjoy learning about different cultures	62% of the Visitors sampled within the Geo-fenced Regional District area enjoy learning about different cultures
I occasionally/regularly participate in Camping activities	61% of the Visitors sampled within the Geo-fenced Regional District area enjoy camping activities	62% of the Visitors sampled within the Geo-fenced Regional District area enjoy camping activities
I occasionally/regularly participate in Whale Watching activities	5% of the Visitors sampled within the Geo-fenced Regional District area enjoy Whale Watching activities	4% of the Visitors sampled within the Geo-fenced Regional District area enjoy Whale Watching activities
I occasionally/regularly participate in Fishing/Hunting activities	28% of the Visitors sampled within the Geo-fenced Regional District area enjoy fishing/hunting activities	26% of the Visitors sampled within the Geo-fenced Regional District area enjoy fishing/hunting activities
I occasionally/regularly participate in Hiking/Backpacking activities	40% of the Visitors sampled within the Geo-fenced Regional District area enjoy hiking/backpacking activities	46% of the Visitors sampled within the Geo-fenced Regional District area enjoy hiking/backpacking activities
I occasionally/regularly participate in Swimming activities	56% of the Visitors sampled within the Geo-fenced Regional District area enjoy swimming activities	58% of the Visitors sampled within the Geo-fenced Regional District area enjoy swimming activities

SUMMARY HIGHLIGHTS

BRITISH COLUMBIA

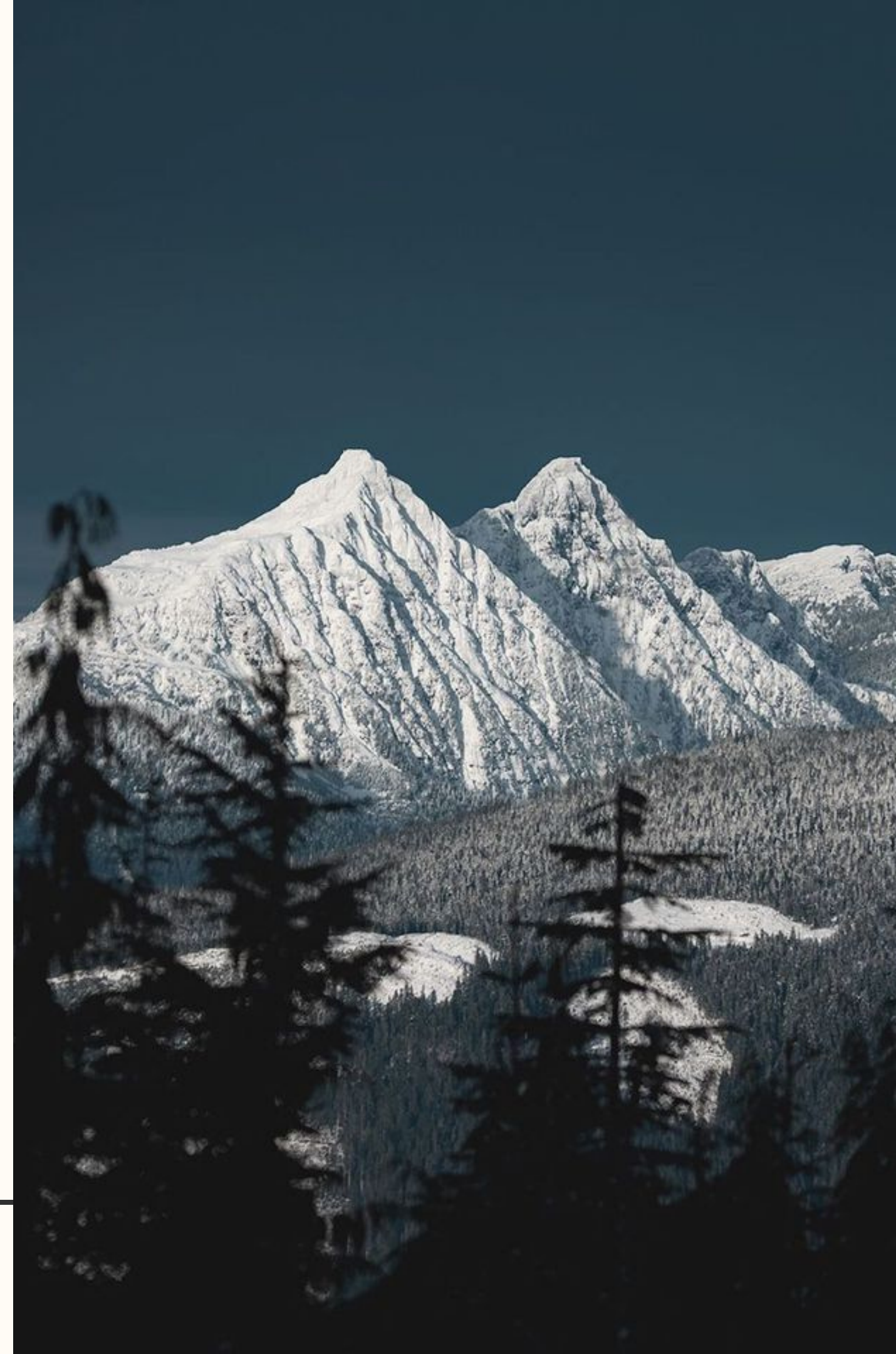
- British Columbia was the primary origin of Regional District Area Visitors, making up **89%** of visitation in 2019 and **95%** in 2020
- Campbell River, Nanaimo and Saanich were the top three visitor origin locations in 2019 and Campbell River, Courtenay and Nanaimo were the top three in 2020
- Scenic Retirement, Country & Western and Slow-Lane Suburbs were the top three in 2019 and Scenic Retirement, Boomer Bliss and Savvy Seniors were the top three in 2020
 - **Country & Western** are typically middle aged, below average income travellers who enjoy: Snowmobiling, Hiking, Camping, Boating
 - **Scenic Retirement** are typically older and more mature, middle-income suburbanites, who enjoy: Visiting Parks/City Gardens, Photography Canoeing and Kayaking
 - **Backcountry Boomers** are typically rural, lower-middle-income older couples and singles. They tend to enjoy their natural surroundings, participating in hiking, cross-country skiing and snowmobiling
 - **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.
 - **Slow-Lane Suburbs** are typically older and mature suburban singles and couples who enjoy active leisure-intensive lifestyles
 - **Savvy Seniors** are upper-middle income seniors living in urban apartments who enjoy golfing and cultural activities
- Rejuvenators, Gentle-Explorers and Authentic Experiencers were the top three EQ Types visiting in 2019 and Rejuvenators, Authentic Experiencers and Gentle Explorers were the top three in 2020



SUMMARY HIGHLIGHTS

ALBERTA

- Alberta was the secondary origin location of Regional District Area Visitors (although visitor counts were still minimal), making up **5%** of visitation in 2019 and **2%** in 2020
- Calgary was the top visitor origin markets in 2019 and 2020 (followed by Wood Buffalo in 2019 and Edmonton in 2020). Although visitation was minimal from all other Alberta locations
- The top three PRIZM Segments visiting Regional District Area in 2019 were New Country, Suburban Sports and Savvy Seniors. The top three in 2020 were Mature & Secure, Mid-City Mellow and Social Networkers.
 - **New Country** are one of the wealthiest rural segments with maintainers between the ages of 45-64 years old. They value community involvement and purchasing from small businesses rather than larger corporations
 - **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
 - **Savvy Seniors** are typically upper-middle-income Seniors in Urban Apartments. Nearly 40% of maintainers are over 65. They enjoy cultural activities, art galleries, the theatre and classical music concerts
 - **Mature & Secure** are typically older and more mature upscale city dwellers, they are wealthy and enjoy staying active through yoga and fitness classes.
 - **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
 - **Social Networkers** are young, diverse singles living in city apartments. They are the youngest of all the PRIZM Segments and enjoy cultural activities such as art, cinema and music
- The top three EQ Types visiting the Regional District Area from Alberta in 2019 were Gentle Explorers, Rejuvenators and Authentic Experiences. The top three in 2020 were Personal History Explorers, Free Spirits and Authentic Experiencers.
- Alberta Visitors to the Regional District Area geo-fenced area tend to be younger, diverse and more family oriented than BC Travellers to Regional District Area. They enjoy outdoor activities such as attending sporting events, and visiting national parks. **50%** have children living at home.



INSIGHTS

POTENTIAL GROWTH MARKETS

British Columbia	Alberta	Considerations	COVID-19 Considerations
<ul style="list-style-type: none"> • Vancouver Island (Campbell River, Nanaimo, Courtenay, Saanich, Comox) <ul style="list-style-type: none"> ◦ 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 Hardy, Port McNeill, Mount Waddington, Port Alice) <ul style="list-style-type: none"> ◦ These are loyal visitors who understand your products/services and visited in 2019 and 2020 • SECONDARY MARKET - Lower Mainland Visitors (Surrey, Vancouver, Squamish) 	<ul style="list-style-type: none"> • Calgary <ul style="list-style-type: none"> ◦ Loyal Visitors (Mid-High income) who are ethnically diverse and are looking to escape from everyday life through adventure based leisure activities • <ul style="list-style-type: none"> ◦ Note: 2020 Visitors from Alberta ranked above average for many active outdoor activities (Swimming, Hiking, Canoeing). 2019 Visitors did not rank as high for the same activities although they did rank high for attending Sporting Events and visiting National/Provincial Parks • Wood Buffalo/Edmonton <ul style="list-style-type: none"> ◦ Visitors on a much smaller scale 	<ul style="list-style-type: none"> • Consider targeting by BC Top PRIZM Segments: <ul style="list-style-type: none"> ◦ Backcountry Boomers ◦ Boomer Bliss ◦ Country & Western ◦ Indigenous Families ◦ Just Getting By ◦ Scenic Retirement • Top 10 Locations of Top PRIZM Segments: <ul style="list-style-type: none"> ◦ Nanaimo ◦ Kelowna ◦ Chilliwack ◦ Kamloops ◦ Abbotsford ◦ North Cowichan ◦ Vernon ◦ Prince George ◦ Saanich ◦ Courtenay 	<p>British Columbia announced a Provincial State of Emergency due to the COVID-19 Pandemic on March 18, 2020, Alberta announced on March 17, 2020</p> <p>Province wide restrictions limiting social interactions and travel are still in place</p> <p><u>BC COVID-19 Travel Restrictions</u></p>

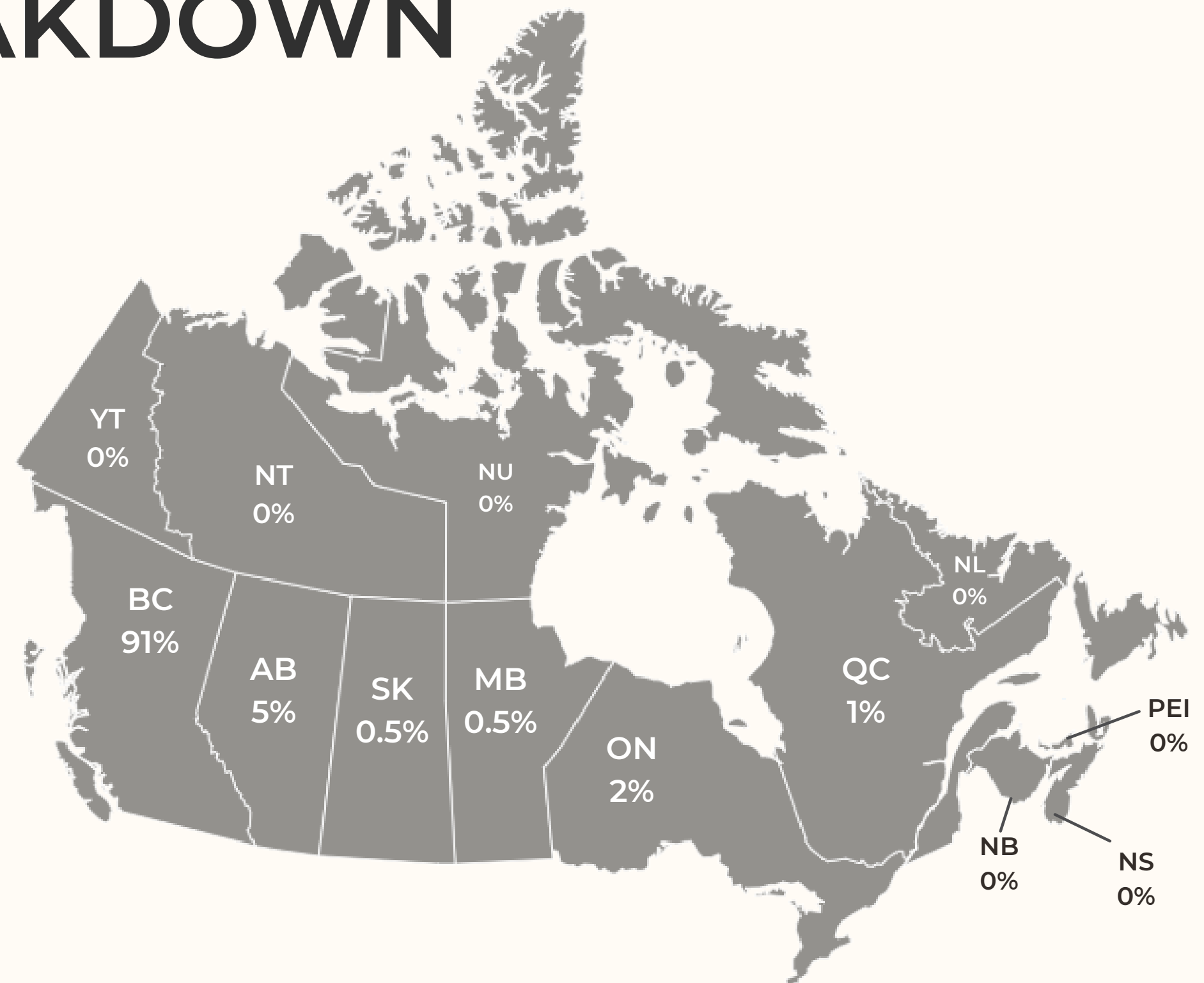
VISITOR ORIGIN

PROVINCIAL BREAKDOWN

2019 VISITORS

- On average 91% of visitors to the 6 geocoded Regional District areas in 2019 were from **British Columbia**, 5% from **Alberta** and 2% from **Ontario**
- This report will focus on the **British Columbia Market**, followed by the **Alberta Market**

Note: When Mount Waddington and Port Alice were removed from the analyses, **BC** made up 89% and **Alberta** 5% of 2019 visitors

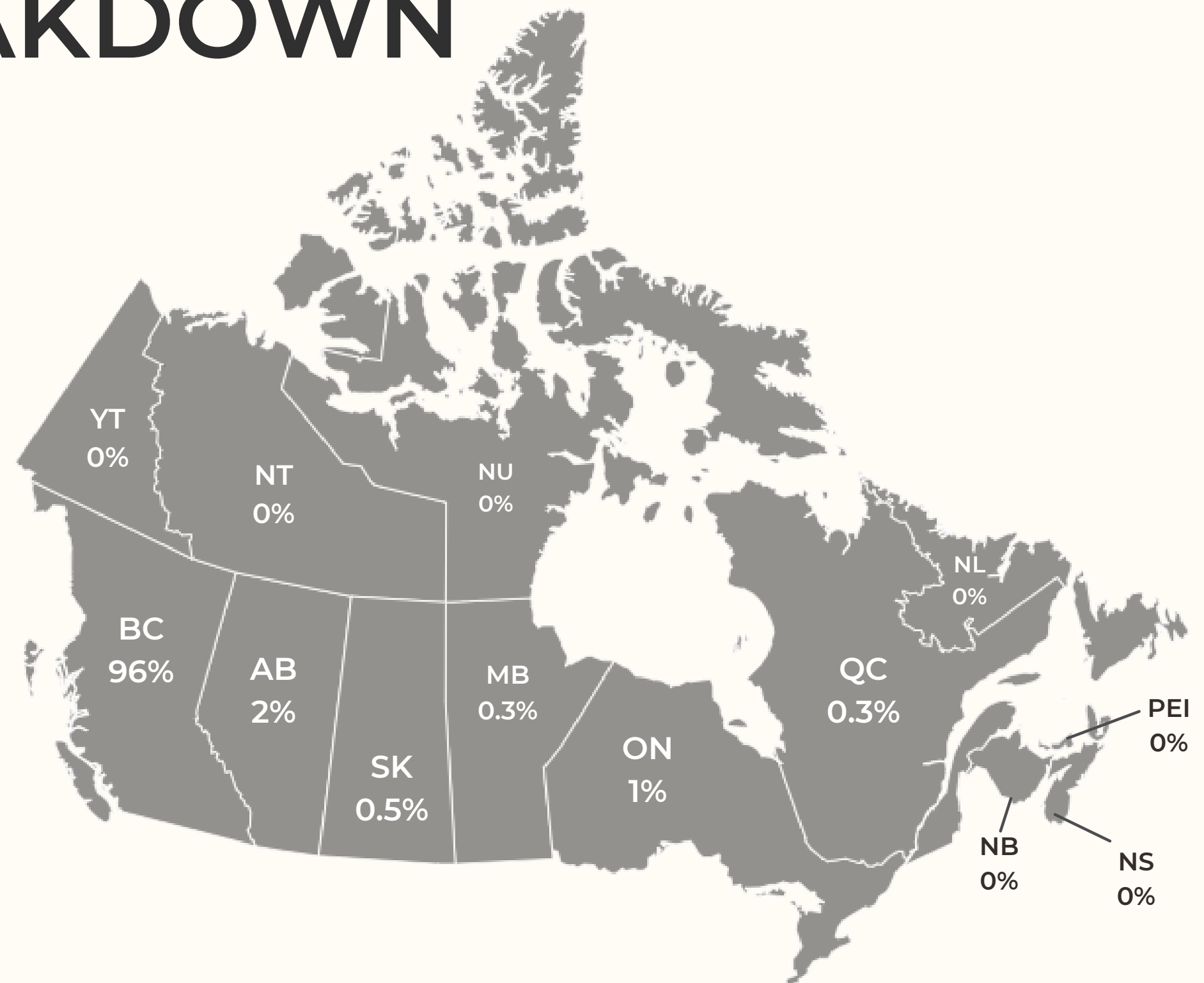


PROVINCIAL BREAKDOWN

2020 VISITORS

- On average 96% of visitors to the 6 geo-coded Regional District areas in 2020 were from **British Columbia**, 2% from **Alberta** and 1% from **Ontario**
- This report will focus on the **British Columbia Market**, followed by the **Alberta Market**

Note: When Mount Waddington and Port Alice were removed from the analyses, **BC** made up 95% and **Alberta** 2% of 2020 visitors



VISITOR ORIGIN BY CITY

BC

Key Findings

- Campbell River ranked as the top visitor origin location in 2019 and 2020 for the Regional District Analysis.
- Non-Northern Vancouver Island Visitation from Saanich and Victoria ranked in the top 7 BC locations in 2019 and Esquimalt in 2020.
- Non Island Visitation from Vancouver and Surrey ranked as top visitor origin locations in 2020.

City

Visitor Origin - 2019

City	% of Total
Campbell River	10%
Nanaimo	10%
Saanich	5%
Comox	4%
Victoria	3%
Courtenay	3%
Squamish	3%

Visitor Origin - 2020

City	% of Total
Campbell River	11%
Courtenay	10%
Nanaimo	8%
Vancouver	5%
Esquimalt	5%
Surrey	4%
Comox	3%

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

City

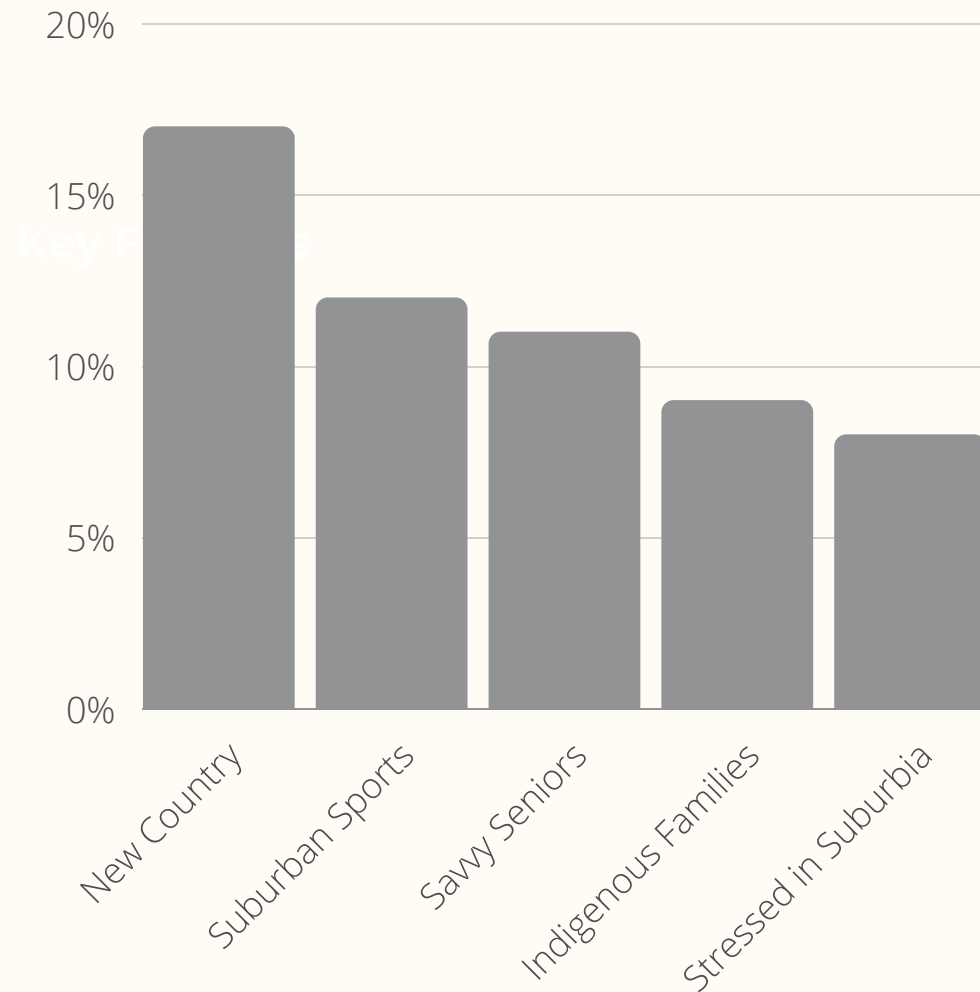
Visitor Origin - 2019	
City	% of Total
Calgary	19%
Wood Buffalo	14%
Brazeau County	9%
Grande Prairie	8%
Strathcona County	8%

Visitor Origin - 2020	
City	% of Total
Calgary	55%
Edmonton	11%
Wood Buffalo	11%

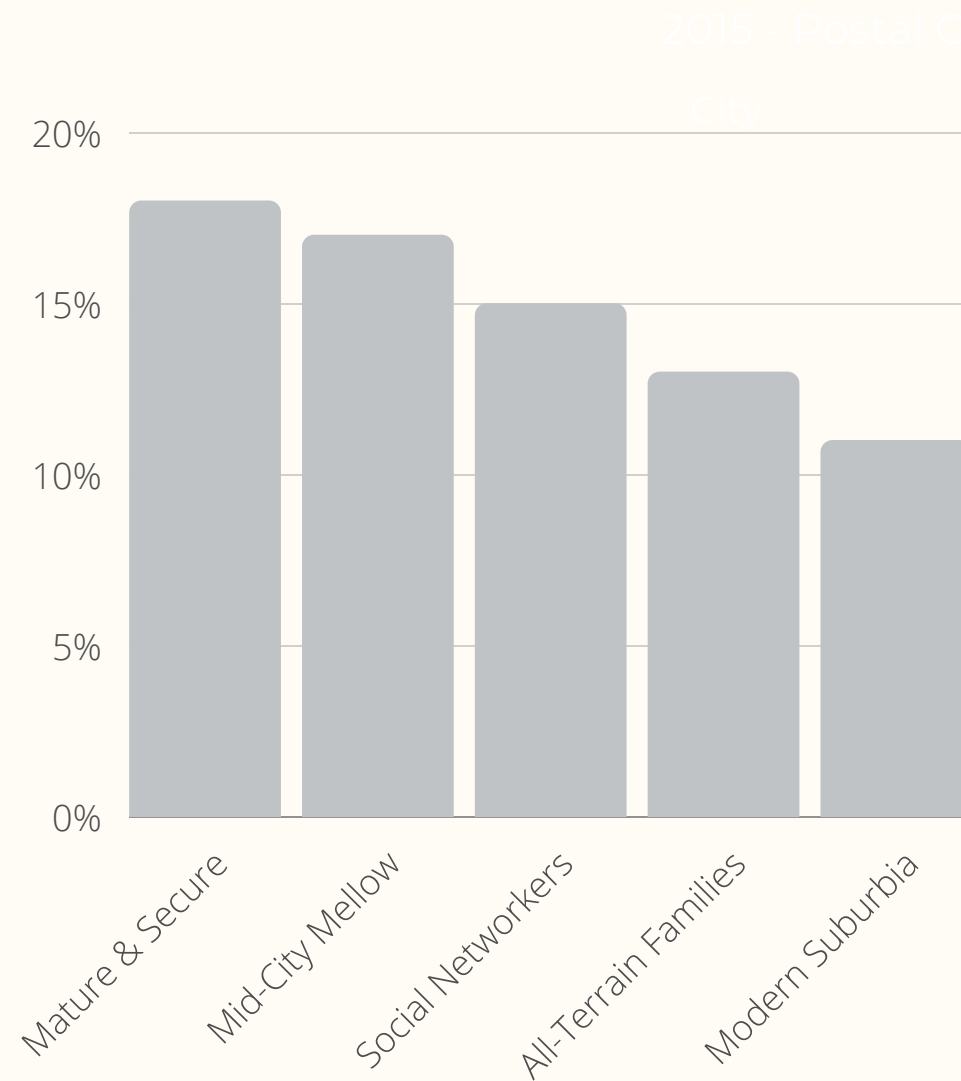
VISITOR PERSONAS

PRIZM SEGMENTS

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA BY YEAR ALBERTA

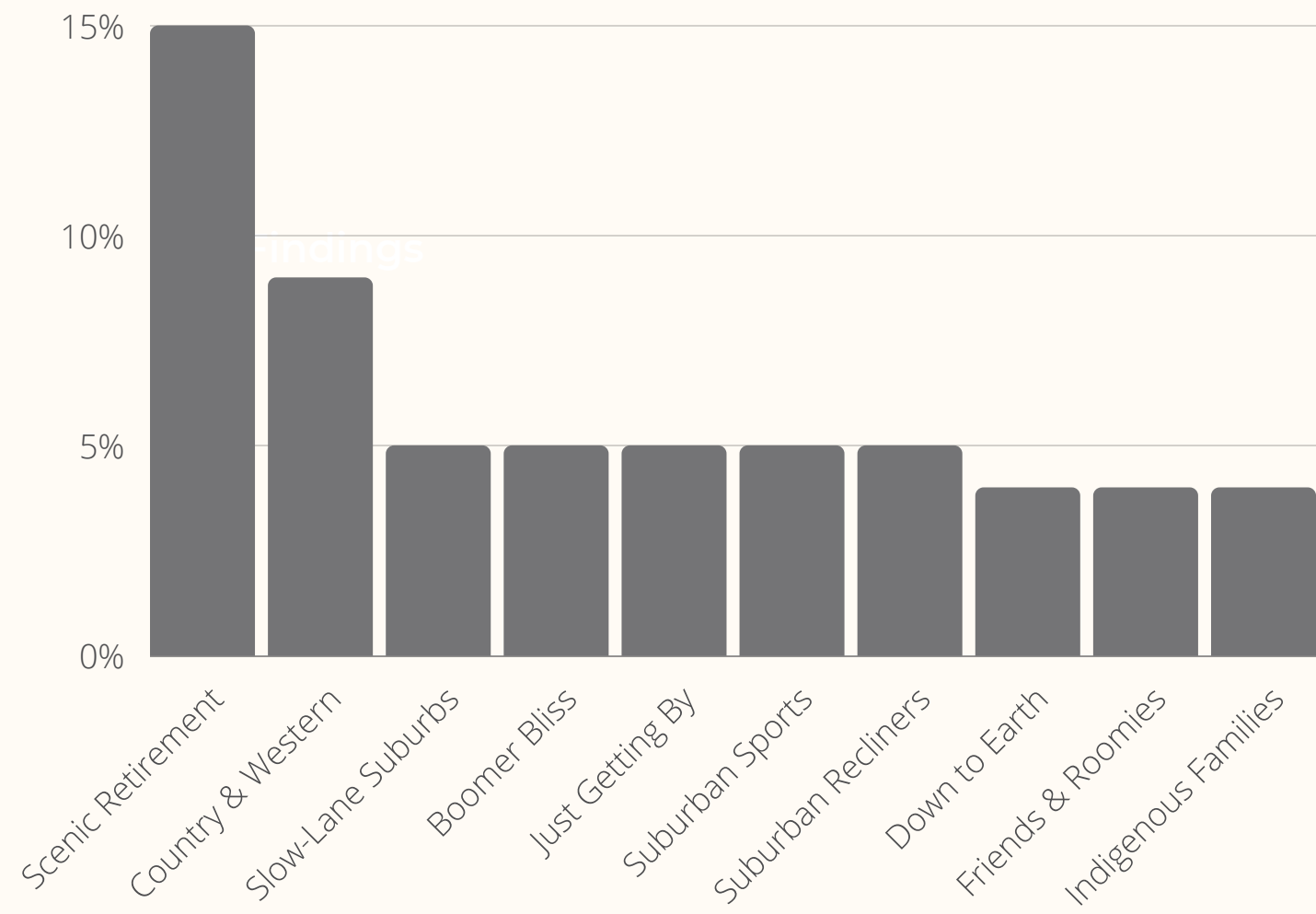


**Alberta Visitors
2019**

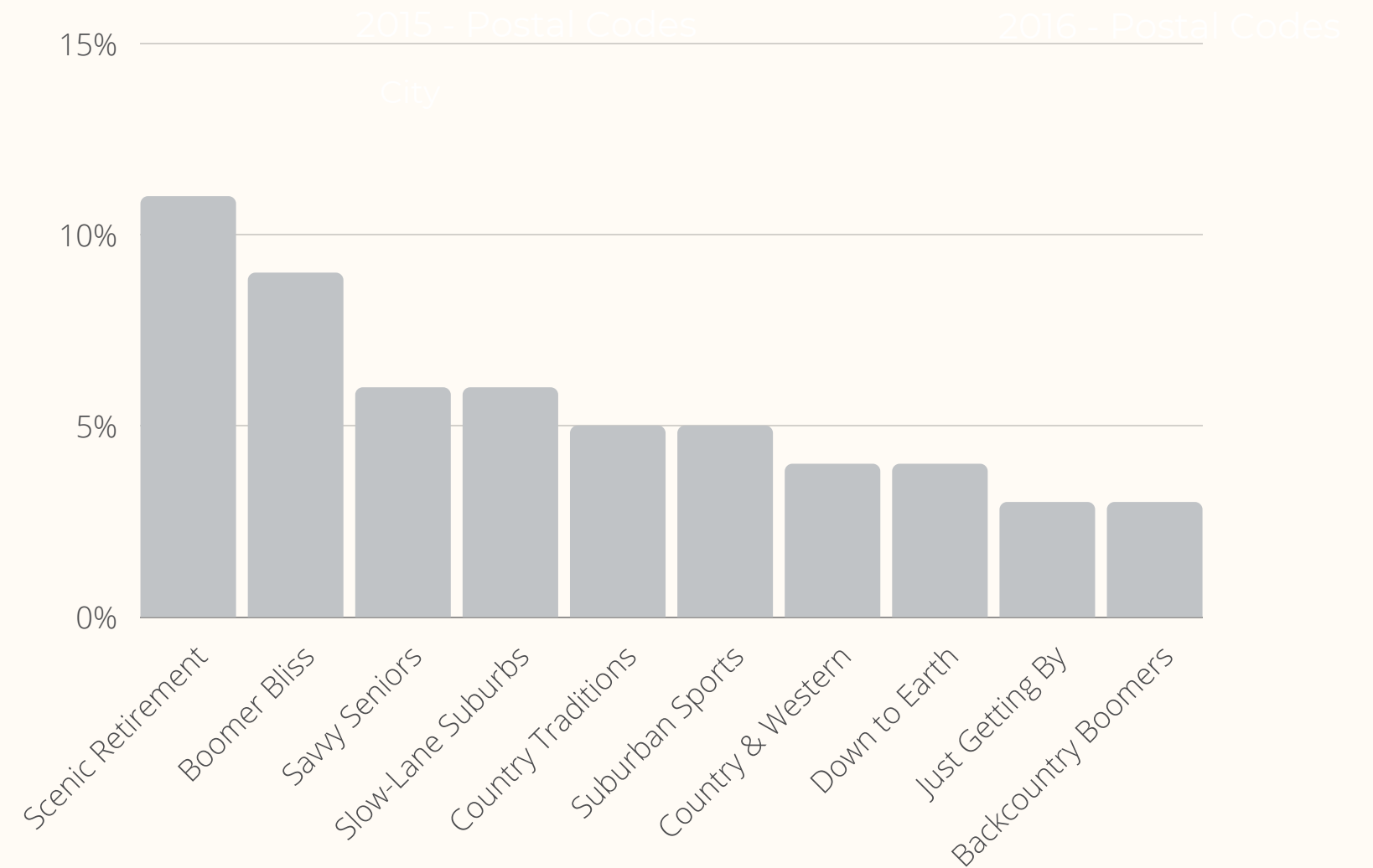


**Alberta Visitors
2020**

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA BY YEAR BC



BC Visitors - Non-Local 2019



BC Visitors - Non-Local 2020

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA 2019/2020

BRITISH COLUMBIA MARKET

Category	Backcountry Boomers	Boomer Bliss	Country & Western	Indigenous Families	Just Getting By	Scenic Retirement
Household Count	<ul style="list-style-type: none"> Rank 15th by Household Count 54,847 households, or 2.7% of the total Households in BC 	<ul style="list-style-type: none"> Rank 13th by Household Count 59,001 Households or 2.9% of the total Households in BC 	<ul style="list-style-type: none"> Rank 3rd by Household Count 87,601 households, or 4.4% of the total Households in BC 	<ul style="list-style-type: none"> Rank 32nd by Household Count 23,088 households, or 1.1% of the total Households in BC 	<ul style="list-style-type: none"> Rank 12th by Household Count 65,327 households, or 3.2% of the total Households in BC 	<ul style="list-style-type: none"> Rank 2nd by Household Count 94,025 households, or 4.7% of the total Households in BC
Maintainer Age	63	62	57	54	51	64
% of Children at Home	37% of couples have children living at home	46% of couples have children living at home	48% of couples have children living at home	37% of couples have children living at home	56% of couples have children living at home	39% 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 \$141,716 compared to BC at \$106,681	Below Average Household Income of \$91,291 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 \$100,586 compared to BC at \$106,681
Top Social Value	Attraction to Nature	Effort Toward Health	Attraction to Nature	Attraction to Nature	Primacy of Environmental Protection	Ethical Consumerism
Social Media Habits	83% currently use Facebook, 30% use Instagram and 20% use Twitter	75% currently use Facebook, 32% use Instagram and 23% use Twitter	84% currently use Facebook, 33% use Instagram and 22% 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, 30% use Instagram and 21% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA 2019/2020

BRITISH COLUMBIA MARKET CONTINUED

Category	Slow-Lane Suburbs	Savvy Seniors	Country Traditions
Household Count	<ul style="list-style-type: none"> Rank 28th by Household Count 28,299 households, or 1.4% of the total Households in BC 	<ul style="list-style-type: none"> Rank 6th by Household Count 85,564 households, or 4.3% of the total Households in BC 	<ul style="list-style-type: none"> Rank 40th by Household Count 14,714 households, or 0.7% of the total Households in BC
Maintainer Age	56	60	56
% of Children at Home	52% of couples have children living at home	48% of couples have children living at home	51% of couples have children living at home
Household Income	Below Average Household Income of \$87,080 compared to BC at \$106,681	Average Household Income of \$104,131 compared to BC at \$106,681	Above Average Household Income of \$120,329 compared to BC at \$106,681
Top Social Value	National Pride	Culture Sampling	Attraction to Nature
Social Media Habits	81% currently use Facebook, 34% use Instagram and 22% use Twitter	79% currently use Facebook, 36% use Instagram and 25% use Twitter	78% currently use Facebook, 33% use Instagram and 21% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA 2019/2020

ALBERTA MARKET

Category	All-Terrain Families	Indigenous Families	Mature & Secure	Mid-City Mellow	Modern Suburbia
Household Count	<ul style="list-style-type: none"> Rank 3rd by Household Count 85,544 households, or 5.2% of the total Households in AB 	<ul style="list-style-type: none"> Rank 43rd by Household Count 5,839 households, or 0.4% of the total Households in AB 	<ul style="list-style-type: none"> Rank 19th by Household Count 35,973 households, or 2.2% of the total Households in AB 	<ul style="list-style-type: none"> Rank 12th by Household Count up 53,453 households, or 3.3% of the total Households in AB 	<ul style="list-style-type: none"> Rank 1st by Household Count 123,489 households, or 7.5% of the total Households in AB
Maintainer Age	42	52	58	58	41
% of Children at Home	53% of couples have children living at home	44% of couples have children living at home	48% of couples have children living at home	57% of couples have children living at home	58% of couples have children living at home
Household Income	Above Average Household Income of \$138,853 compared to AB at \$125,945	Below Average Household Income of \$98,996 compared to AB at \$125,945	Above Average Household Income of \$160,241 compared to AB at \$125,945	Average Household Income of \$119,718 compared to AB at \$125,945	Above Average Household Income of \$141,199 compared to AB at \$125,945
Top Social Value	Need for Escape	Attraction to Nature	Legacy	Culture Sampling	Confidence in Advertising
Social Media Habits	78% currently use Facebook, 43% use Instagram and 31% use Twitter	53% currently use Facebook, 33% use Instagram and 22% use Twitter	75% currently use Facebook, 37% use Instagram and 29% use Twitter	78% currently use Facebook, 35% use Instagram and 27% use Twitter	77% currently use Facebook, 48% use Instagram and 36% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA 2019/2020

ALBERTA MARKET CONTINUED

Category	New Country	Savvy Seniors	Social Networkers	Stressed in Suburbia	Suburban Sports
Household Count	<ul style="list-style-type: none"> Rank 5th by Household Count 71,011 households, or 4.3% of the total Households in AB 	<ul style="list-style-type: none"> Rank 14th by Household Count up 43,382 households, or 2.6% of the total Households in AB 	<ul style="list-style-type: none"> Rank 32nd by Household Count 16,894 households, or 1% of the total Households in AB 	<ul style="list-style-type: none"> Rank 15th by Household Count 42,788 households, or 2.6% of the total Households in AB 	<ul style="list-style-type: none"> Rank 9th by Household Count 61,676 households, or 3.8% of the total Households in AB
Maintainer Age	55	56	35	48	50
% of Children at Home	54% of couples have children living at home	52% of couples have children living at home	34% of couples have children living at home	44% of couples have children living at home	46% of couples have children living at home
Household Income	Below Average Household Income of \$107,836 compared to AB at \$125,945	Average Household Income of \$124,394 compared to AB at \$125,945	Below Average Household Income of \$73,479 compared to AB at \$125,945	Below Average Household Income of \$110,451 compared to AB at \$125,945	Average Household Income of \$136,314 compared to AB at \$125,945
Top Social Value	Attraction to Nature	Culture Sampling	Culture Sampling	Racial Fusion	Racial Fusion
Social Media Habits	80% currently use Facebook, 31% use Instagram and 21% use Twitter	78% currently use Facebook, 38% use Instagram and 28% use Twitter	76% currently use Facebook, 44% use Instagram and 30% use Twitter	80% currently use Facebook, 37% use Instagram and 27% use Twitter	79% currently use Facebook, 35% use Instagram and 25% use Twitter

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA 2019/2020

CANADIAN PRIZM SUMMARIES

All-Terrain Families

All-Terrain Families are typically:

- Younger and Middle-Aged couples and families with children under the age of 15
- Value hard work, and the thrill of purchasing, are often impulse shoppers who do not spend a great deal of time researching products before buying them

Backcountry Boomers

Backcountry Boomers are typically:

- Rural, lower-middle-income older couples and singles
- Below Average Household Income
- Enjoy:
 - Photography
 - Visiting Parks/City Gardens

Boomer Bliss

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

Country & Western are typically:

- Middle-aged
- Below-average income travellers
- Value outdoor experiences such as:
 - Snowmobiling
 - Hiking
 - Camping
 - Boating

Country Traditions

Country Traditions are typically:

- Rural, upper-middle-income couples and families
- Enjoy relaxing in cottages/cabins
- Value outdoor experiences such as:
 - Gardening
 - Boating
 - Swimming

TOP PRIZM SEGMENTS OF VISITORS TO THE REGIONAL DISTRICT AREA 2019/2020

CANADIAN PRIZM SUMMARIES CONTINUED

Indigenous Families

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

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

Mature & Secure

Mature & Secure are typically:

- Older couples and families with children (ages 10+) at home
- Enjoy:
 - Ice Skating
 - Visiting Specialty Theatres/IMAX
 - Downhill Skiing
- Value their health and local (Canadian) made products/services

Mid-City Mellow

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 THE REGIONAL DISTRICT AREA 2019/2020

CANADIAN PRIZM SUMMARIES CONTINUED

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

New Country

New Country are typically:

- One of the wealthiest rural segments in Canada
- Typically between the ages of 45-64 years old
- Value:
 - Community involvement
 - purchasing from small businesses

Savvy Seniors

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

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 THE REGIONAL DISTRICT AREA 2019/2020

CANADIAN PRIZM SUMMARIES CONTINUED

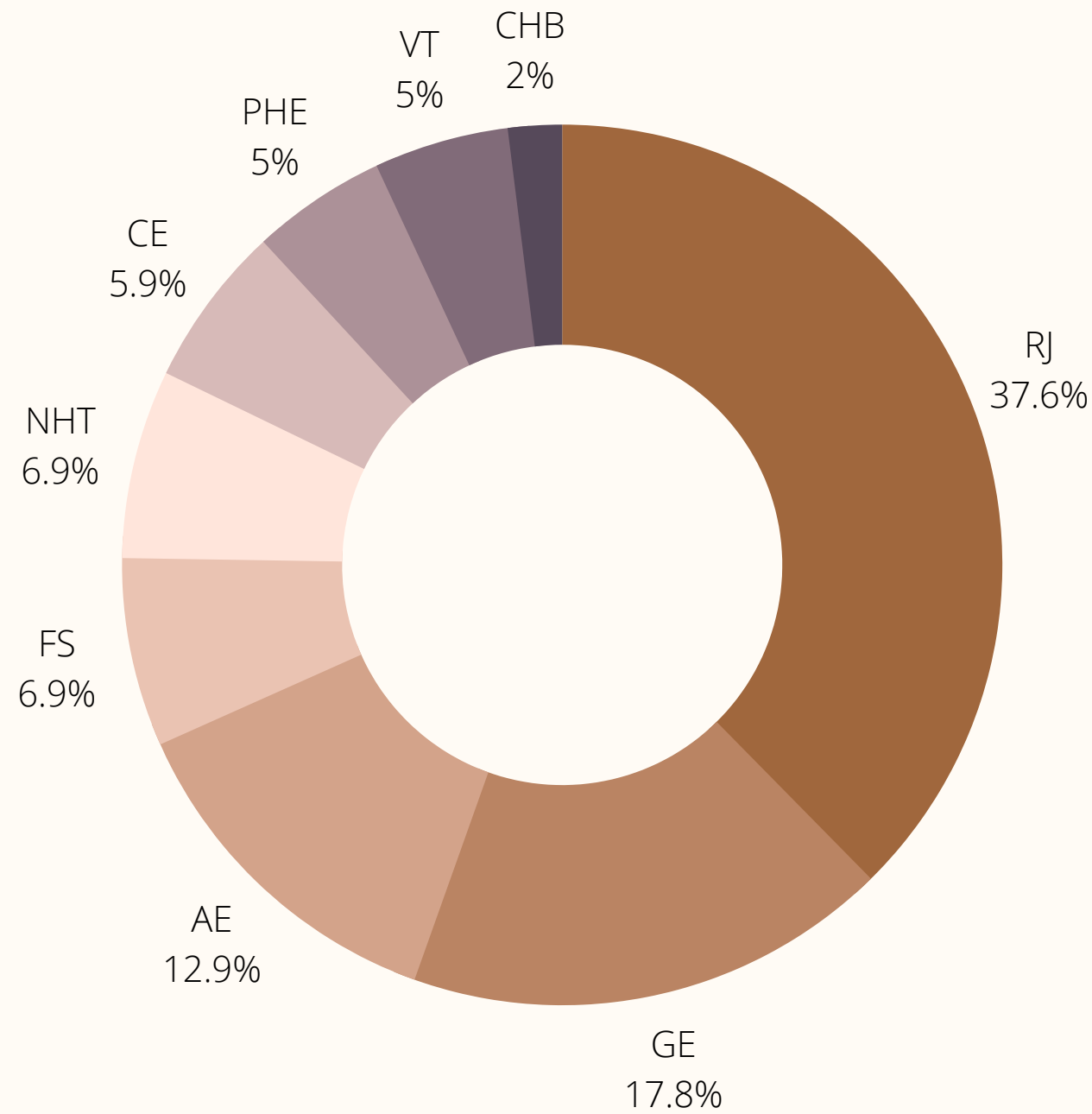
Slow-Lane Suburbs	Social Networkers	Stressed in Suburbia	Suburban Sports
<p>Slow-Lane Suburbs are typically:</p> <ul style="list-style-type: none"> • Older and Mature suburban singles and couples • Enjoy: <ul style="list-style-type: none"> ◦ Fishing/Hunting ◦ Camping • Enjoy living active, leisure-intensive lifestyles <ul style="list-style-type: none"> ◦ Community Theatre ◦ Beer/Food/Wine Festivals 	<p>Social Networkers are typically:</p> <ul style="list-style-type: none"> • Young, Diverse singles in city apartments. Over 50% identify as a visible minority • Enjoy: <ul style="list-style-type: none"> ◦ Beer/Food/Wine Festivals ◦ Music Festivals ◦ Marathons • Enjoy the lively cultural scene of city living, frequenting art galleries, cinemas, operas and music festivals 	<p>Stressed in Suburbia are typically:</p> <ul style="list-style-type: none"> • Middle-Income, younger and middle-aged suburban families • Below Average Household Income • Enjoy: <ul style="list-style-type: none"> ◦ Swimming ◦ Camping ◦ Fishing/Hunting 	<p>Suburban Sports are typically:</p> <ul style="list-style-type: none"> • Middle-aged couples and families • Enjoy: <ul style="list-style-type: none"> ◦ Camping ◦ Fishing/Hunting ◦ Cross Country Skiing and Snowshoeing • Value community involvement and companies that treat their employees fairly

VISITOR PERSONAS

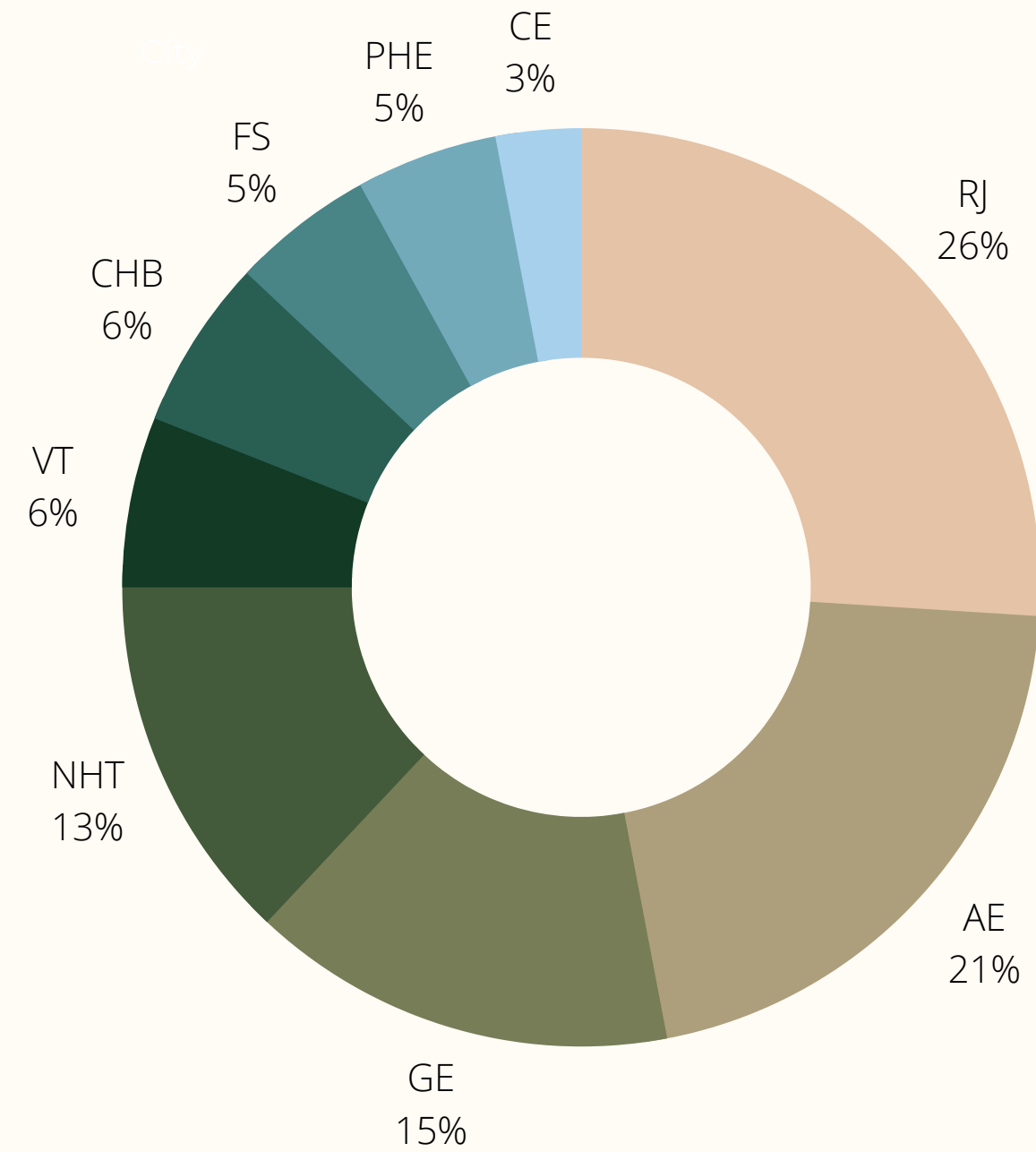
EQ TYPES

TOP EQ TYPES OF VISITORS TO THE REGIONAL DISTRICT AREA BY YEAR

BC



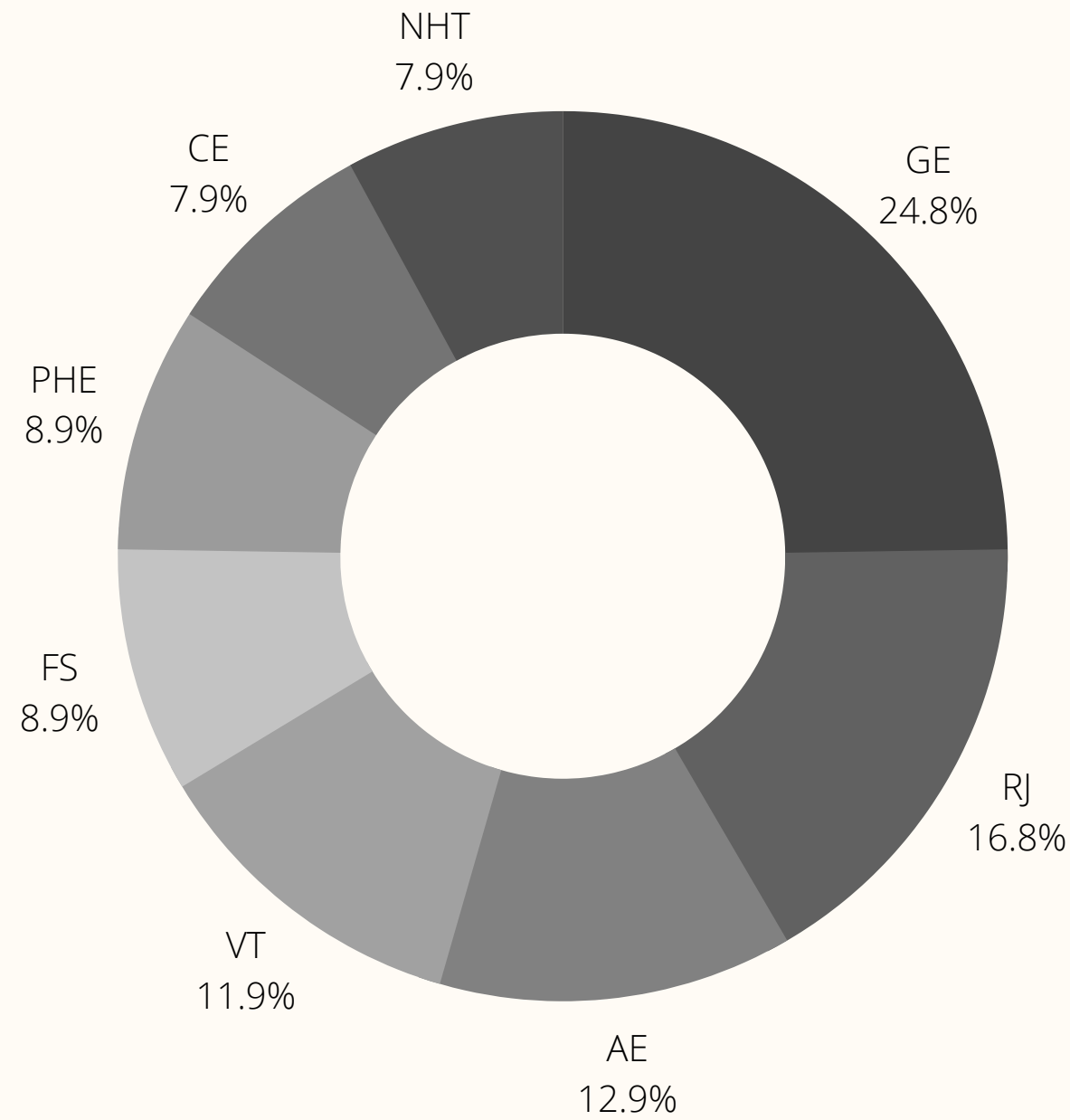
BC Visitors Non-Local - 2019



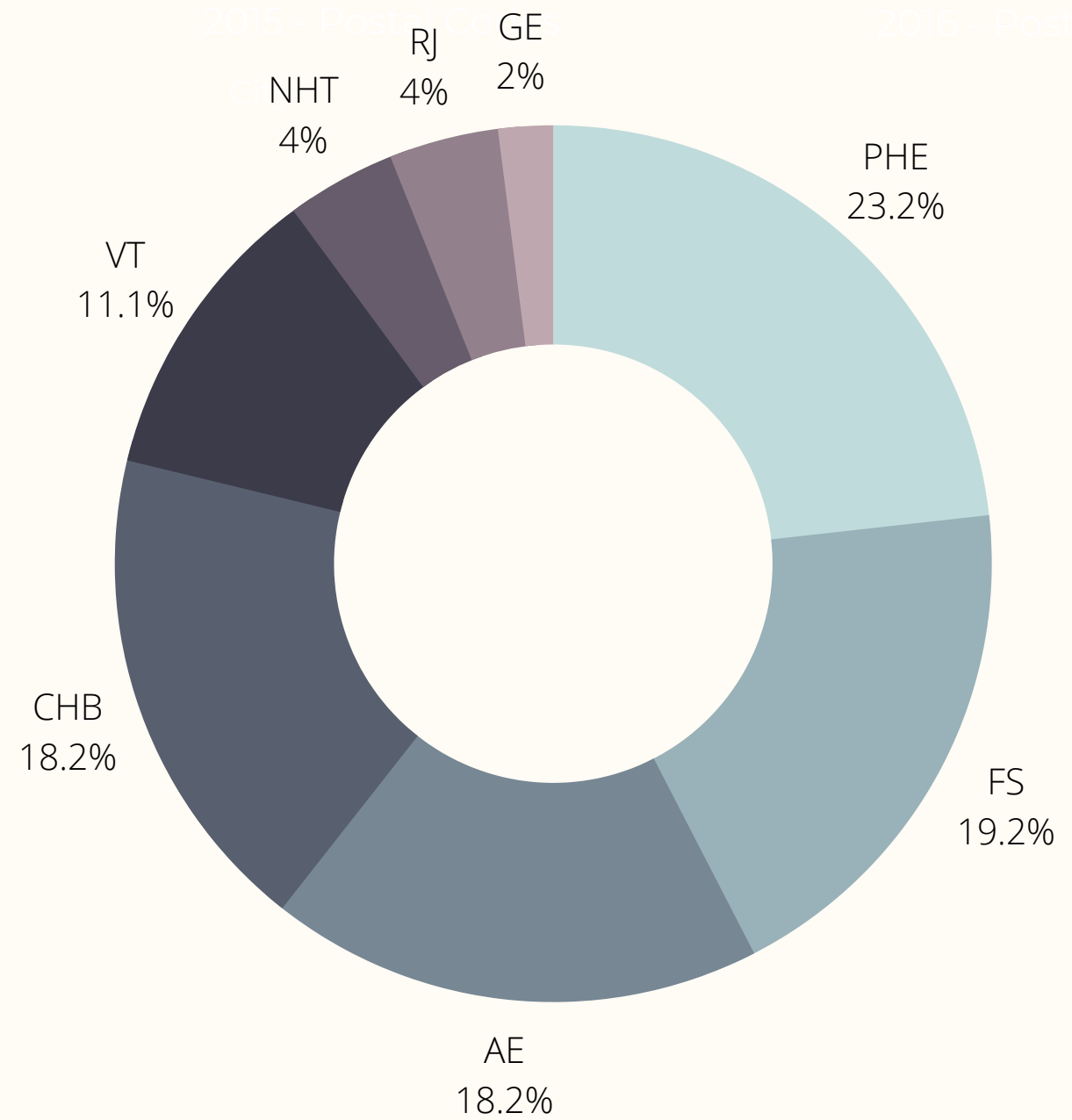
BC Visitors Non-Local - 2020

TOP EQ TYPES OF VISITORS TO THE REGIONAL DISTRICT AREA BY YEAR

ALBERTA



Alberta Visitors - 2019



AB Visitors - 2020

TOP EQ TYPES OF VISITORS TO THE REGIONAL DISTRICT AREA

BRITISH COLUMBIA MARKET

Category	Rejuvenators	Gentle Explorers	Authentic Experiencers
Household Count	<ul style="list-style-type: none"> Rank 3rd by Household Count 294,476 households, or 14.6% of the total Households in BC 	<ul style="list-style-type: none"> Rank 1st by Household Count 322,371 households, or 16% of the total Households in BC 	<ul style="list-style-type: none"> 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 THE REGIONAL DISTRICT AREA

ALBERTA MARKET

Category	Authentic Experiencers	Free Spirits	Gentle Explorers
Household Count	<ul style="list-style-type: none"> Rank 3rd by Household Count 207,086 households, or 12.6% of the total Households in AB 	<ul style="list-style-type: none"> Rank 1st by Household Count 322,609 households, or 19.6% of the total Households in AB 	<ul style="list-style-type: none"> 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 THE REGIONAL DISTRICT AREA

ALBERTA MARKET CONTINUED

Category	Personal History Explorers	Rejuvenators
Household Count	<ul style="list-style-type: none"> Rank 7th by Household Count 70,695 households, or 4.3% of the total Households in AB 	<ul style="list-style-type: none"> Rank 3rd by Household Count 237,088 households, or 14.4% of the total Households in AB
Maintainer Age	57	55
% of Children at Home	57% of couples have children living at home	54% 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
Top Social Value	Culture Sampling	Attraction to Nature
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

TOP EQ TYPES OF VISITORS TO THE REGIONAL DISTRICT AREA

CANADIAN EQ SUMMARIES

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

Free Spirits

- Ethnically diverse, well educated families that earn moderate incomes; living in urban and suburban areas
- 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
- Tend to be young, experimentalist, committed travellers looking for thrills and frills. They live the travel experience to the fullest
- They seek some structure when they travel so they can indulge in worry-free hedonistic activities
- Enjoy the best they can afford in terms of accommodations and restaurants

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

TOP EQ TYPES OF VISITORS TO THE REGIONAL DISTRICT AREA

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

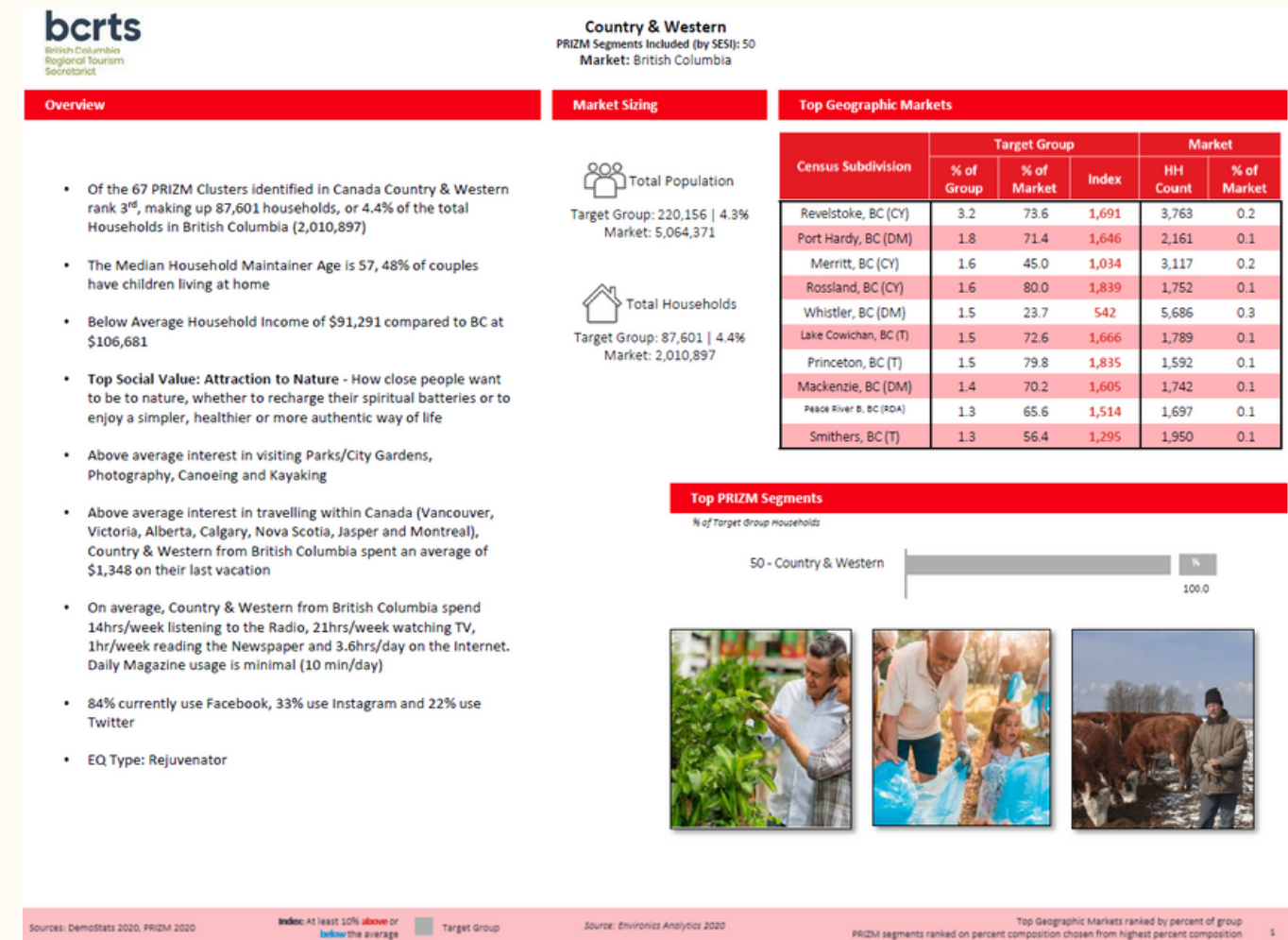
- Middle-aged families with lower levels of educational attainment; living outside of urban areas
- Virtual Travellers are highly reluctant travellers who travel only when they must, and typically just to visit friends or relatives
- For Virtual Travellers, travelling is a chore, not an experience to 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

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



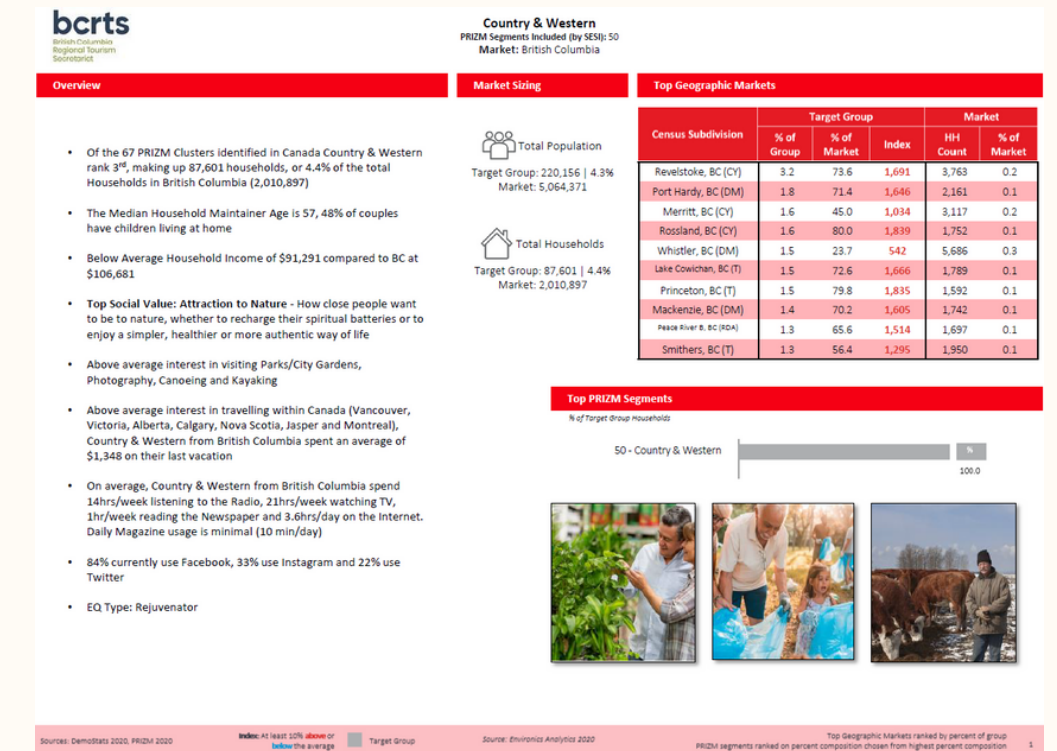
SUMMARY OF REPORTS

Project Deliverables:

- Regional District Area - Visitor Analysis Summary Report
- Regional District 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:

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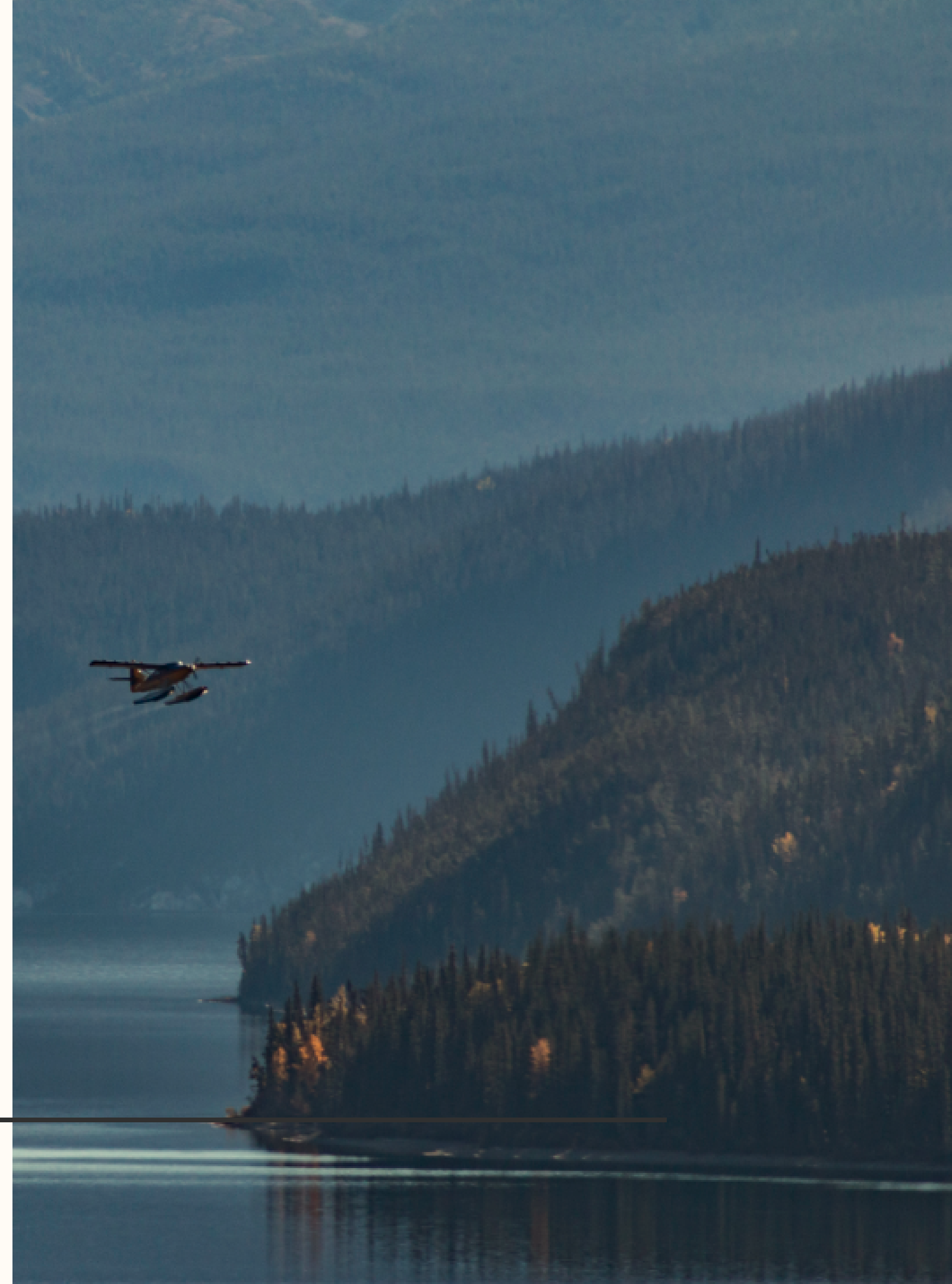
RESOURCES

[Destination Canada - Explorer Quotient \(EQ\) Program](#)

[Environics Analytics](#)

[British Columbia - COVID-19](#)

[Thompson Okanagan Tourism Association - Research Spotlight](#)



ABOUT SYMPHONY

- **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. 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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