Golden Visitor Segmentation Study
PRIZM Analysis

Tourism Golden

DETAILED SEGMENT SUMMARY

TOURISM
Golden
GOLDEN RULES

Table of Contents

Introduction

Align Consulting Group (ACG) was retained by Tourism Golden to analyze the Telus Insights data and develop target segments in Canada and the USA. Unfortunately, the PRIZM system requires a full postal code but the Telus Insights data only provides the FSA (first three digits). As such, we leveraged the Environics' MobileScapes data. ACG worked closely with Destination BC who supported Tourism Golden through the provision of the PRIZM software and access to the MobileScapes data, as well as their staff time and expertise throughout the project.

The process consisted of four main steps:

1. Pull MobileScapes data based on hand-drawn polygons to avoid capture of through-traffic;
2. Identify the PRIZM consumer segments contained in the relevant MobileScapes data;
3. Group PRIZM consumer segments to get unique target profiles for Tourism Golden; and,
4. Leverage the PRIZM analytics output to develop insights about these unique target profiles/segments.

This report focuses on the segments that were identified and analyzed through the aforementioned steps.

Introduction

Purpose & Objectives:

The purpose of this project was to update Tourism Golden's target segments in Canada. The overall goal of segmentation is to identify high yield segments – that is, those segments that are likely to be the most profitable or that have growth potential – so that these can be selected for special attention (i.e. become target markets).Based on this purpose, the main objectives were:

- To advance Tourism Golden's tactical knowledge of visitors in Canada;

- To identify/confirm Golden's EQ segments; and,

- To geo-locate potential visitors.

About the MobileScapes data:

- Data was pulled based on catchment areas defined in coordination with Tourism Golden.
- The data excluded local residents and those living within approximately 1 hour drive.
- Data was based on two complete years running from November 2019-October 2021. The data was also broken out by season (Winter & Summer) which informed segment development.

What is PRIZM?

PRIZM is a segmentation system developed by Environics Analytics that categorizes each Canadian or US household into one of 67 consumer segments (lifestyle types). Each lifestyle group is linked to a postal or zip code.

The data provide better understanding of customers based on their behaviours, insights on how to appeal to them, and how to reach them. Specifically, it identifies locations that have a high likelihood of reaching new customers.

For Golden visitors, like consumer segments (of the 67 mentioned above) were combined into 5 segments.

Segments

5 Canadian Segments Developed

1. Authentic Winter Warriors
2. Diverse Summer Learners
3. Rural Year-Round Rejuvenators
4. Round City Escapists
5. Year-Round Suburban Families

represents **45%** of the Canadian market

Tips for Reading

- Because the base data used was the MobileScapes Data, which is only domestic travellers, there are 5 Canadian Segments but no US Segments.

- Segments were primarily developed based on PRIZM social group, PRIZM lifestage group, EQ and other demographics as available.

- PRIZM lifestyle types are summarized for each segment but be aware they have changed since the last iteration of this in 2017.

- Most percentages are on a household level rather than an individual level.

Tips for Reading

- The segment summaries present data based on incidence levels and index scores.

- Index scores are not displayed here (only interpreted)

- Index scores are available in accompanying excel spreadsheets

- Red percentages/numbers mean high index scores (> 110)

- Blue percentages/numbers mean low index scores (< 80)

- Black numbers mean average index scores (between 109 and 81)
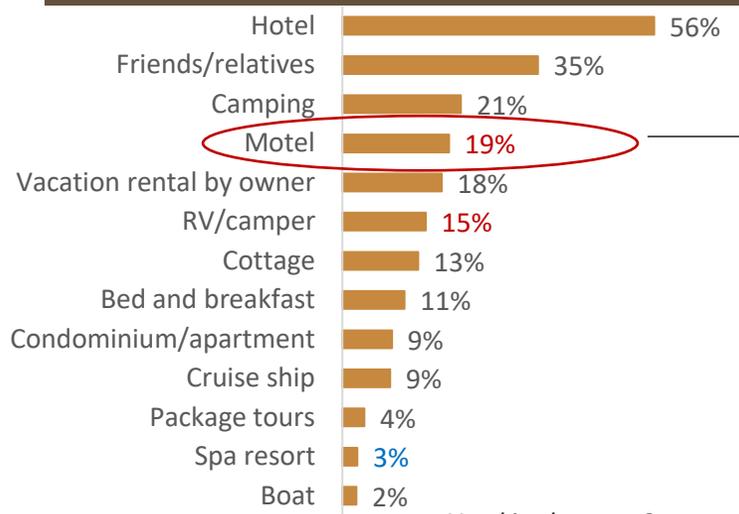
Index Calculation

$$\frac{\% \text{ of Segment}}{\% \text{ of General Population}} = \text{Index Score}$$

Example: % RYRRs booked through discount/last minute agency = 6.33%

% general population booked through discount/last minute agency = 8.21%

6.33/8.21 = 77 index score
77 is less than 80 so percentage below (6%) is blue

RYRRs Vacation Accommodations

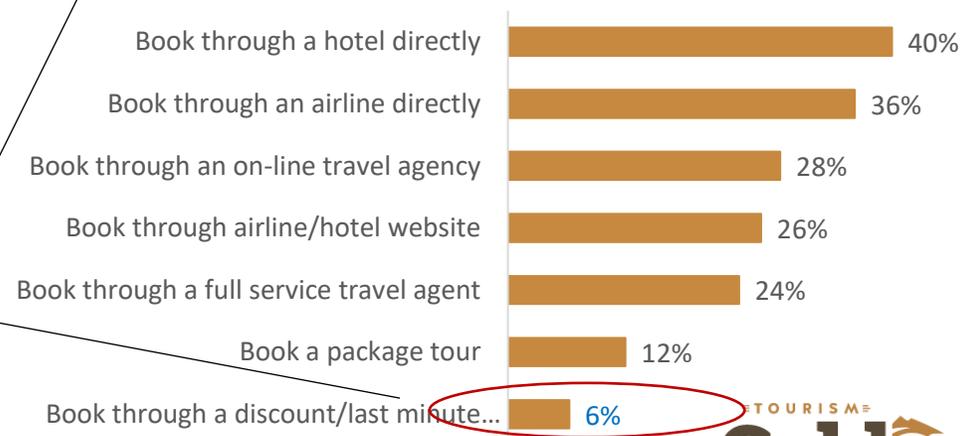| Accommodation	%
Hotel	56%
Friends/relatives	35%
Camping	21%
Motel	**19%**
Vacation rental by owner	18%
RV/camper	**15%**
Cottage	13%
Bed and breakfast	11%
Condominium/apartment	9%
Cruise ship	9%
Package tours	4%
Spa resort	3%
Boat	2%

Used in the past 3 years

Interpretation

RYRRs are more likely than the general population to stay at a motel.

RYRRs are less likely than the general population to book vacation services through an airline/hotel website.

RYRRs Vacation Services Bookings

Booking Method	%
Book through a hotel directly	40%
Book through an airline directly	36%
Book through an on-line travel agency	28%
Book through airline/hotel website	26%
Book through a full service travel agent	24%
Book a package tour	12%
Book through a discount/last minute...	6%

Used in the past 3 years

Golden
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Canadian Segments

1. Authentic Winter Warriors

2. Diverse Summer Learners

3. Rural Year-Round Rejuvenators

4. Round City Escapists

5. Year-Round Suburban Families

1. Authentic Winter Warriors (AWW)

Authentic Winter Warriors (AWW) - Summary

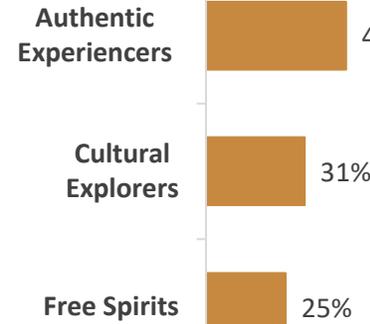## Market Size (Households)

15,031,844 in Canada

AWW HHs

1,242,522 HHs in Canada

8% of market

Snapshot

Urban and suburban upscale/wealthy families and couples or empty nests with a university degree.

EQ Types

Authentic Experiencers	44%
Cultural Explorers	31%
Free Spirits	25%

Authentic Experiencers are understated travellers looking for authentic, tangible engagement with destinations and are very interested in historical travel.

Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Learners

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.

Enthusiastic Indulgers

PRIZM Lifestyle Groups in the Authentic Winter Warriors Segment

20%

09 BOOMER BLISS
- Older and mature, upscale suburbanites.
- Suburban Elite
- Older Families & Empty Nests

17%

57 JUGGLING ACTS
- Younger, lower-middle-income urban singles and families.
- Younger Urban Mix
- Younger Singles & Couples

16%

22 INDIEVILLE
- Younger and middle-aged urban singles and couples.
- Young Urban Core
- Younger Singles & Couples

15%

06 DOWNTOWN VERVE
- Younger and middle-aged upscale city dwellers.
- Urban Elite
- School-Age Families

14%

04 TURBO BURBS
- Middle-aged upscale suburbanites.
- Suburban Elite
- Middle-Age Families

10%

02 WEALTHY & WISE
- Wealthy, older and mature city sophisticates.
- Urban Elite
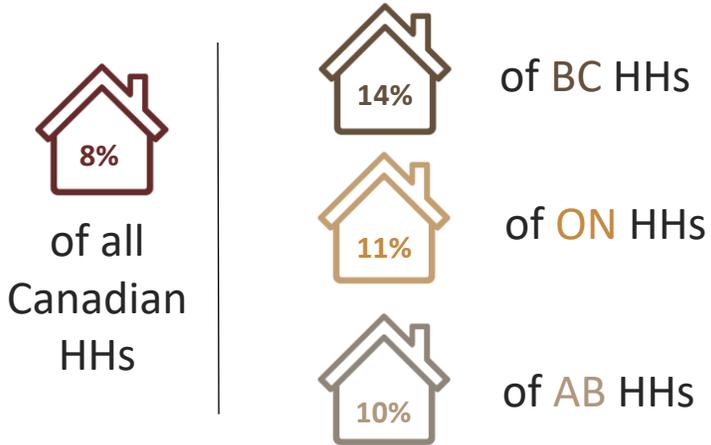- Older Families & Empty Nests

7%

30 SOUTH ASIAN SOCIETY
- Middle-aged, middle-income South Asian families.
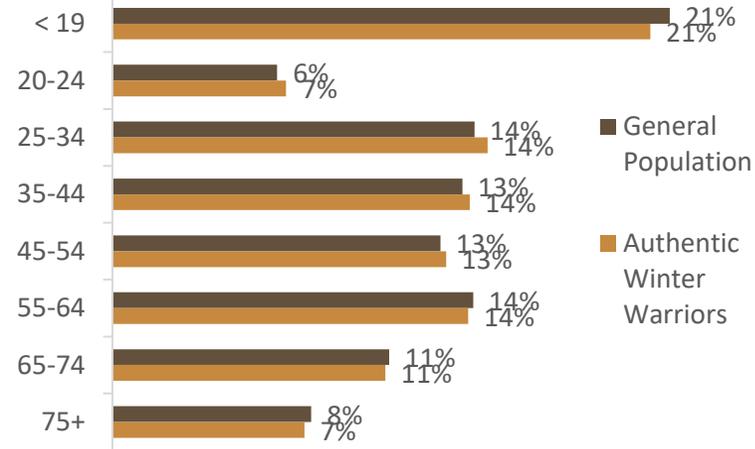- Midscale Urban Fringe
- Large Diverse Families
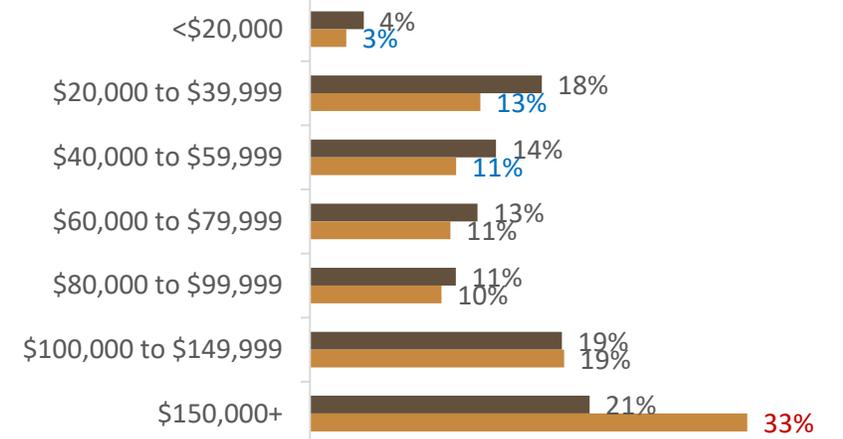
AWWs - Demographics

AWW HHs

8% of all Canadian HHs

14% of BC HHs

11% of ON HHs

10% of AB HHs

Age

Age	General Population	Authentic Winter Warriors
< 19	21%	21%
20-24	6%	7%
25-34	14%	14%
35-44	13%	14%
45-54	13%	13%
55-64	14%	14%
65-74	11%	11%
75+	8%	7%

AWW Average Age = 41.5
General Pop. Average Age = 41.5

HH Income ($ CND)

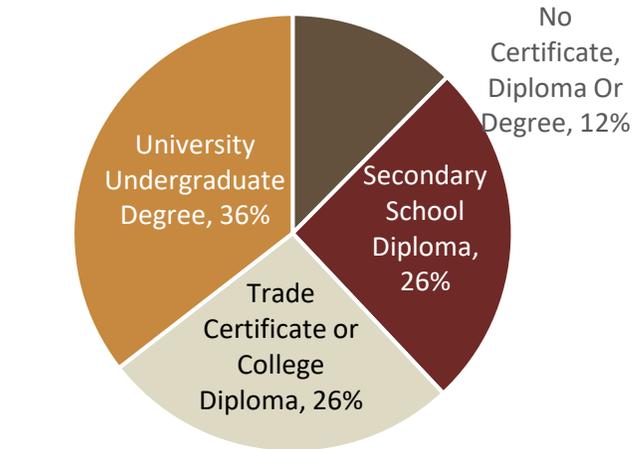| Income	General Population	Authentic Winter Warriors
<$20,000	4%	3%
$20,000 to $39,999	18%	13%
$40,000 to $59,999	14%	11%
$60,000 to $79,999	13%	11%
$80,000 to $99,999	11%	10%
$100,000 to $149,999	19%	19%
$150,000+	21%	33%

AWW Average HH Income = $146,924
General Pop. Average HH Income = $109,506

AWW Demographics

25% are visible minorities

24% are immigrants

84% speak English

13% speak English & French

AWW Education

- University Undergraduate Degree, 36%
- No Certificate, Diploma Or Degree, 12%
- Secondary School Diploma, 26%
- Trade Certificate or College Diploma, 26%

36% AWW have University Degree
26% General Pop have University Degree

AWW Family Structure

58% married/common law
45% with children at home
  33% are < 10 years old
  35% are 10-19
  33% are 20+

2.60 average persons in households
67% occupy a detached house
70% own their accommodation

AWWs – Traditional Media Highlights

Overall Media Use

TV: Moderate

Radio: Moderate

Newspapers: Moderate

Magazines: Light/Moderate

OOH: Light

Print Media – Daily Newspaper

32% read the daily newspaper yesterday
8% read the community newspaper yesterday

Top 5 Newspaper Sections Read:
57% Local & regional news
54% National news
51% International/world
34% Health
34% Movie & entertainment
26% read the Travel section

*AWWs were more likely to read the **Real estate** and **New homes** sections.*

Radio

66% listened to the radio yesterday

Top 5 Radio Program Reach:
31% News/Talk
16% Adult Contemporary
16% Mainstream Top 40
14% Classic Hits
14% Multi/Variety/Specialty

*AWW radio listeners were more likely than the general population to listen to **jazz, ethnic/multi-cultural, adult standards** and **classic rock,** among many other radio programs.*

Out of Home

High index scores on noticing out of home advertising

Top 5 Places Advertising Noticed:
30% Billboards
25% On Bus Exteriors
17% Digital Billboards
17% On Street Furniture
16% On Transit Shelters

Noticed in past week.

*AWWs were more likely than the general population to notice advertising inside **commuter trains**, on **taxis, subway cars/ platforms** and many other locations.*

Print Media – Magazine

19% read a magazine yesterday, more likely to have usage in light and moderate categories.

Top 5 Magazines Read:
11% CAA Magazine
8% Other English-Canadian
8% Other U.S. Magazines
7% Canadian Living
7% Maclean's

*AWWs were more likely to read **Report on Business, Cottage Life, Food & Drink, Style at Home** and **Zoomer** magazines among many other titles.*

TV

Moderate index scores for watching TV

*AWW TV watchers were more likely than the general population to watch **golf** and **basketball** programming, and spend more hours watching speciality and digital networks like **MSNBC US, Crave TV, Vision TV, TCM, Golf Channel, Teletoon, AMC** and **Slice** network, among many others.*

AWWs – Online Habits

Online Behaviour – General Use

Overall Internet Use:
29% Light
30% Moderate
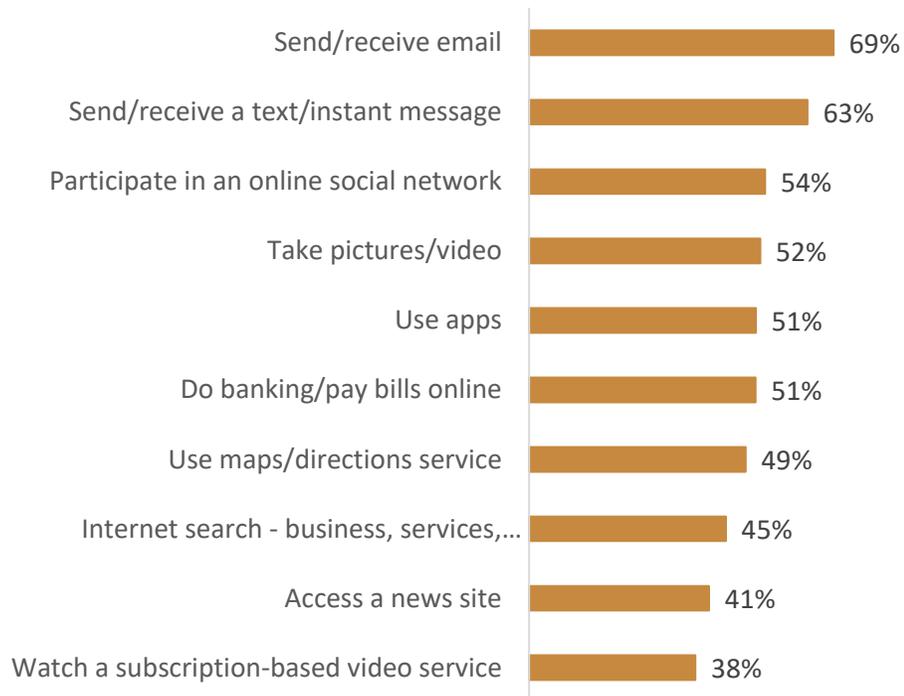**32%** Heavy

Used Internet Yesterday:

84%

Time Spent Online:

0-5 hours	5-10 hours	10-15 hours	15-25 hours	25 hours+
5%	15%	12%	22%	35%

Hours spent on the internet on weekdays

Online Behaviour – Selected Activities

Activity	%
Send/receive email	69%
Send/receive a text/instant message	63%
Participate in an online social network	54%
Take pictures/video	52%
Use apps	51%
Do banking/pay bills online	51%
Use maps/directions service	49%
Internet search - business, services,…	45%
Access a news site	41%
Watch a subscription-based video service	38%

Activities in past week.

Mobile Behaviour – Selected Activities

Activity	%
Send/receive a text/instant message	58%
Take pictures/video	50%
Send/receive email	49%
Use apps	47%
Participate in an online social network	41%
Use maps/directions service	41%
Internet search - business, services,…	29%
Access a news site	27%
Do banking/pay bills online	26%
Watch free streaming music videos	21%

Activities in past week.

AWWs – Social Media

Overall Social Media Use

High

57% participate in online social media networks yesterday
24% have more than 300 friends

Social Media Currently Use

Facebook 77%

YouTube 71%

WhatsApp 44%

LinkedIn 43%

Instagram 40%

Twitter 30%

Pinterest 28%

Snapchat 12%

TikTok 7%

Overall, AWWs are active social media users with Facebook being their primary social media platform. They are more likely to actively use WhatsApp, LinkedIn, Instagram and Twitter apps than the general population. Also, AWWs are also notably more likely to participate every day in online chats, listen to radio or stream music, view friend's photos and use SM to keep up to date on news/events in their industry.

Reasons to <u>follow</u> brands through Social Media

18% follow more than 5 brands

31% - To learn about a brand's products /services
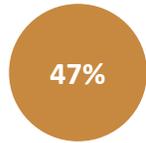**28%** - To get coupons and discounts
26% - To enter contests
13% - To be among the first to hear brand news
11% - To provide feedback to the brand about their products or services
9% - To engage with content

Reasons to <u>disengage</u> with brands through Social Media

47% have disengaged from a brand

34% - Too many messages
20% - Not enough value
14% - I stopped purchasing products from this brand

Social Media Actions

33% - Like brand on Facebook
19% - Subscribe to brand email newsletter
15% - Follow brand on Instagram
13% - Subscribe to brand channel on YouTube
9% - Follow brand on Twitter
9% - Join an online community of consumers who also like the brand

AWWs – Activities and Attractions
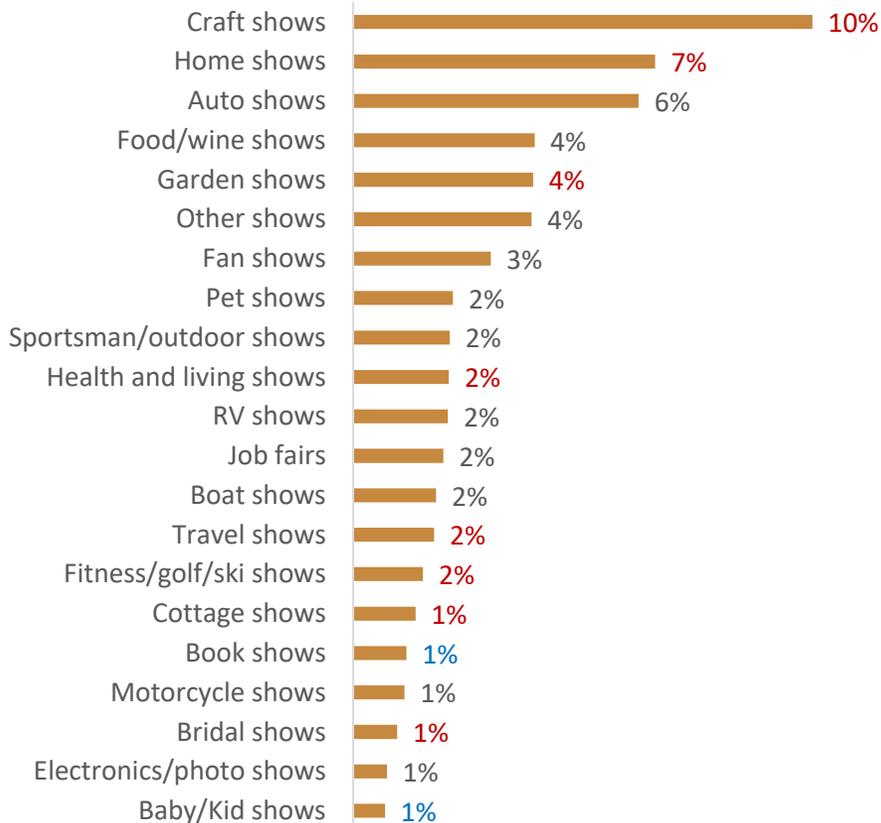
Club Membership
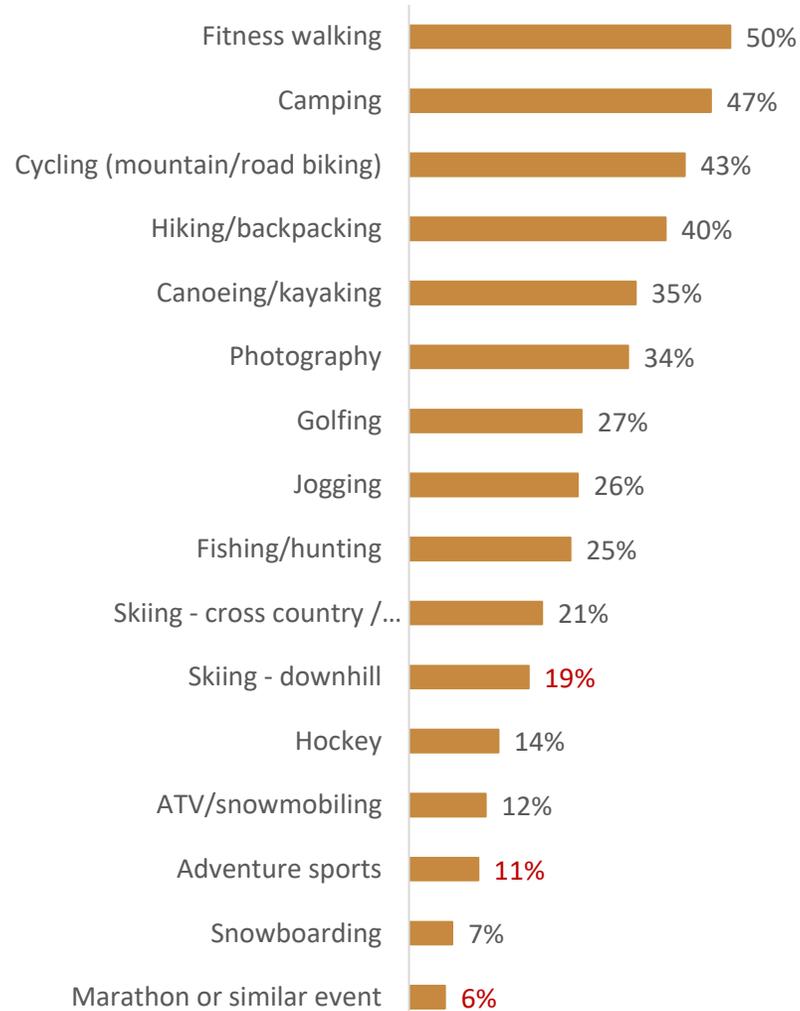
High index scores for club membership

22% were a member of a fitness club
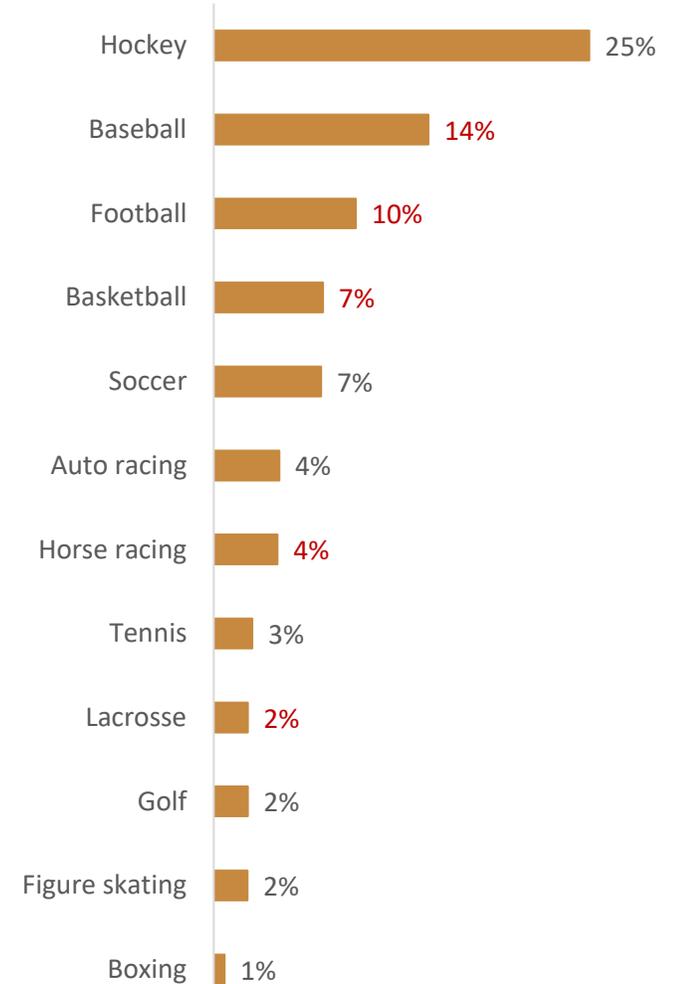**3%** were a member of a golf club

Consumer Shows Attended in Past Year

Show	Percent
Craft shows	10%
Home shows	7%
Auto shows	6%
Food/wine shows	4%
Garden shows	4%
Other shows	4%
Fan shows	3%
Pet shows	2%
Sportsman/outdoor shows	2%
Health and living shows	2%
RV shows	2%
Job fairs	2%
Boat shows	2%
Travel shows	2%
Fitness/golf/ski shows	2%
Cottage shows	1%
Book shows	1%
Motorcycle shows	1%
Bridal shows	1%
Electronics/photo shows	1%
Baby/Kid shows	1%

Selected Outdoor Activity Participation
(Occasional or Regular Participation)

Activity	Percent
Fitness walking	50%
Camping	47%
Cycling (mountain/road biking)	43%
Hiking/backpacking	40%
Canoeing/kayaking	35%
Photography	34%
Golfing	27%
Jogging	26%
Fishing/hunting	25%
Skiing - cross country /…	21%
Skiing - downhill	19%
Hockey	14%
ATV/snowmobiling	12%
Adventure sports	11%
Snowboarding	7%
Marathon or similar event	6%

Attendance at Live Professional Sporting Events
(Occasional or Regular Participation)

Sport	Percent
Hockey	25%
Baseball	14%
Football	10%
Basketball	7%
Soccer	7%
Auto racing	4%
Horse racing	4%
Tennis	3%
Lacrosse	2%
Golf	2%
Figure skating	2%
Boxing	1%

AWWs – General Travel Behaviour

Frequency of Travel

- 0 Trips: 18%
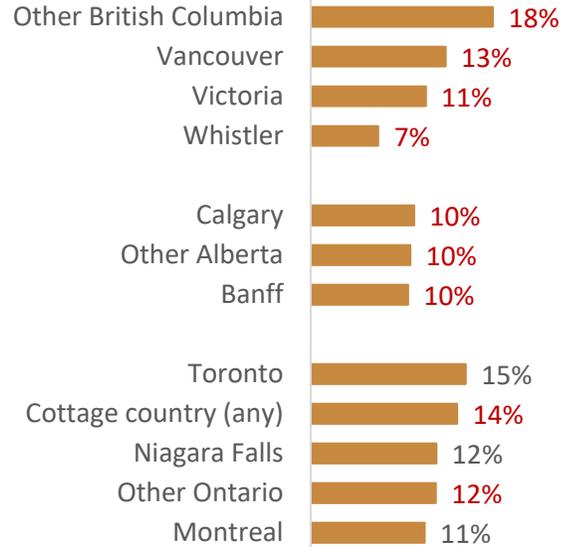- 1-2 Trips: 24%
- 3-4 Trips: 29%
- 5+ Trips: 29%

Taken in the past 3 years

3.6

Avg. out-of-town vacations taken in the past 3 years

Vacation Destinations

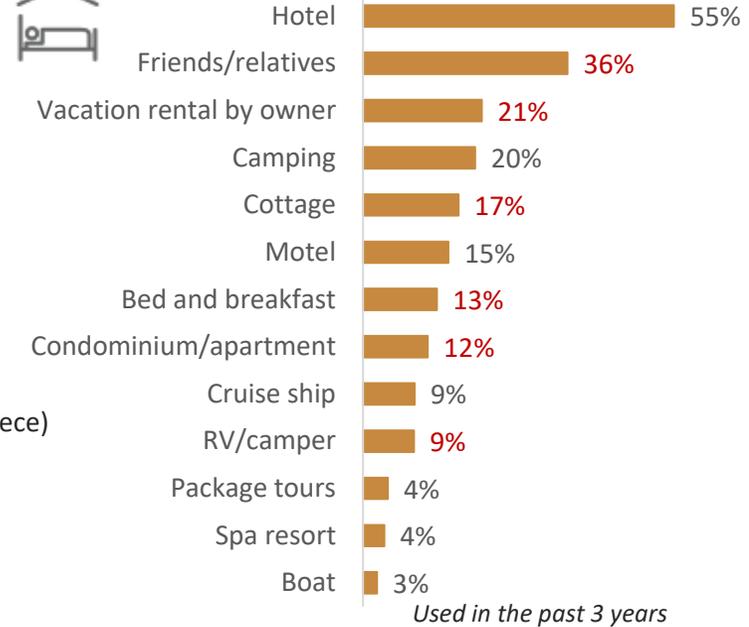### Top Canadian Destinations

Visited in the past 3 years

- Other British Columbia: 18%
- Vancouver: 13%
- Victoria: 11%
- Whistler: 7%
- Calgary: 10%
- Other Alberta: 10%
- Banff: 10%
- Toronto: 15%
- Cottage country (any): 14%
- Niagara Falls: 12%
- Other Ontario: 12%
- Montreal: 11%

Top US

- 12% Florida
- 9% Other Western US
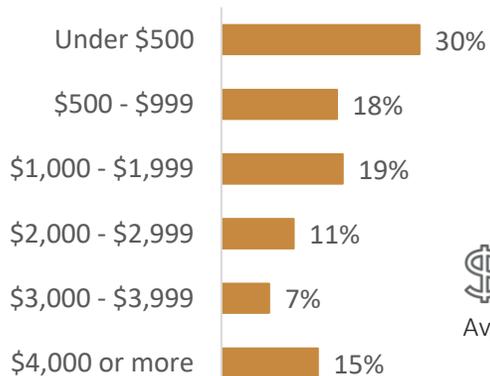- 7% New York City
- 7% Las Vegas
- 6% Other Southern US

Top Overseas

- 12% Mexico
- 11% Other Europe (Incl. Turkey, Greece)
- 10% United Kingdom/Republic of Ireland
- 10% Other Caribbean
- 6% France
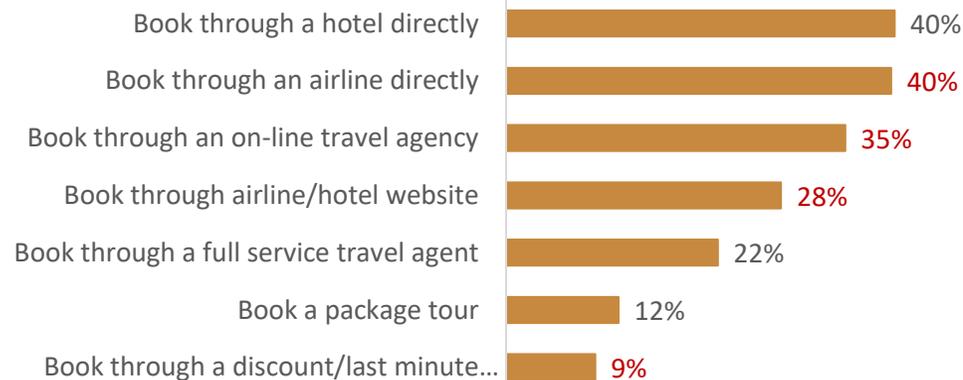
Vacation Accommodations

Used in the past 3 years

- Hotel: 55%
- Friends/relatives: 36%
- Vacation rental by owner: 21%
- Camping: 20%
- Cottage: 17%
- Motel: 15%
- Bed and breakfast: 13%
- Condominium/apartment: 12%
- Cruise ship: 9%
- RV/camper: 9%
- Package tours: 4%
- Spa resort: 4%
- Boat: 3%

Amount Spent on Last Vacation

- Under $500: 30%
- $500 - $999: 18%
- $1,000 - $1,999: 19%
- $2,000 - $2,999: 11%
- $3,000 - $3,999: 7%
- $4,000 or more: 15%

$1,674

Avg. spend on last trip

Vacation Services Bookings

Used in the past 3 years

- Book through a hotel directly: 40%
- Book through an airline directly: 40%
- Book through an on-line travel agency: 35%
- Book through airline/hotel website: 28%
- Book through a full service travel agent: 22%
- Book a package tour: 12%
- Book through a discount/last minute…: 9%

Booking Websites Visited

Visited in past year

- Expedia.com/Expedia.ca: 37%
- Airline websites: 31%
- Booking.com: 21%
- Hotels.com: 18%
- Trivago.ca: 17%
- Other online travel sites: 14%
- Travelocity.com/Travelocity.ca: 13%
- Sunwing.ca: 10%
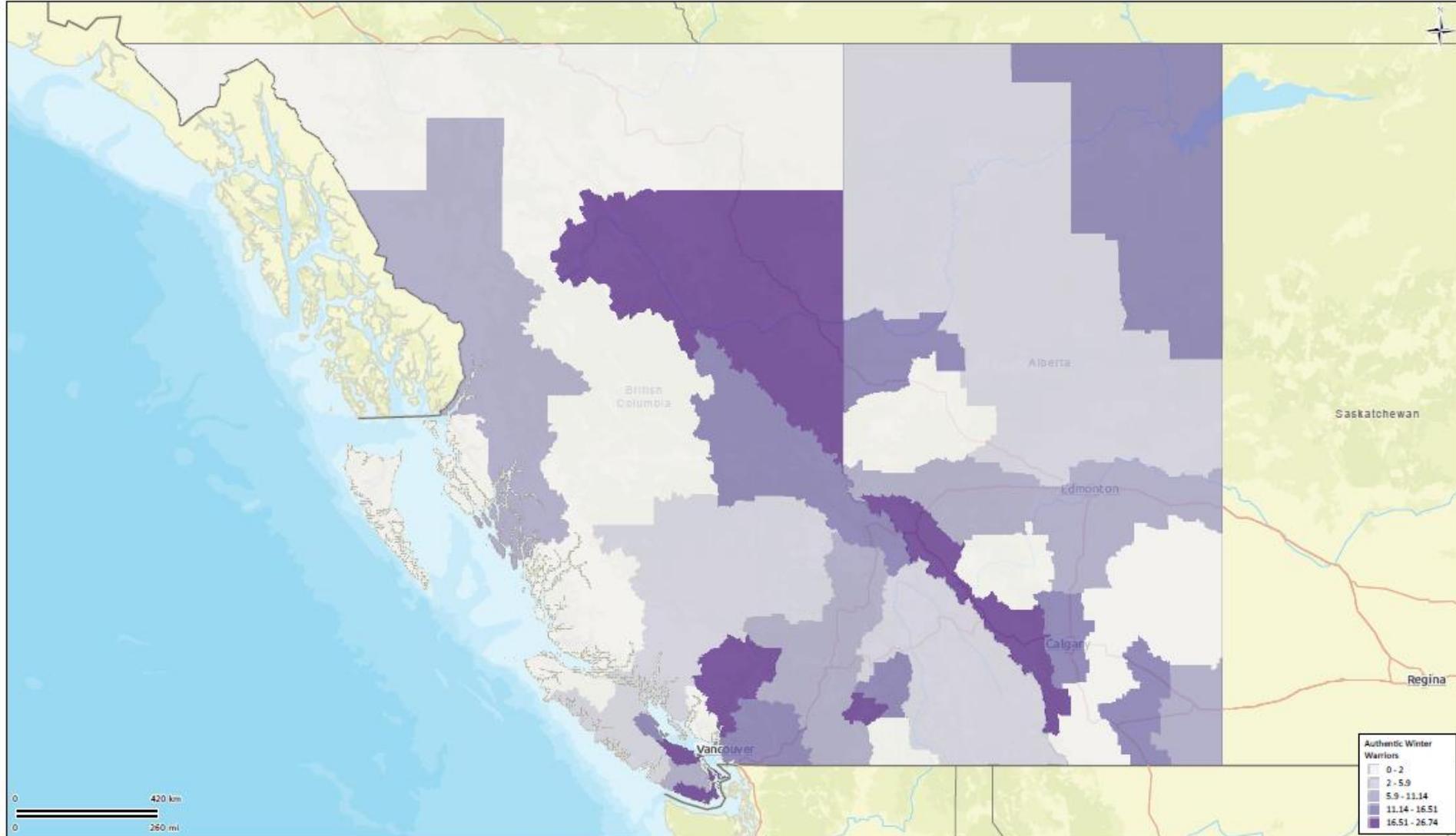- Other discount travel sites: 9%
- Redtag.ca: 6%
- itravel2000.com: 6%

AWWs – BC/AB Census Divisions (% Penetration)

Authentic Winter Warriors
Target Group Penetration: Golden Target Groups

Authentic Winter Warriors
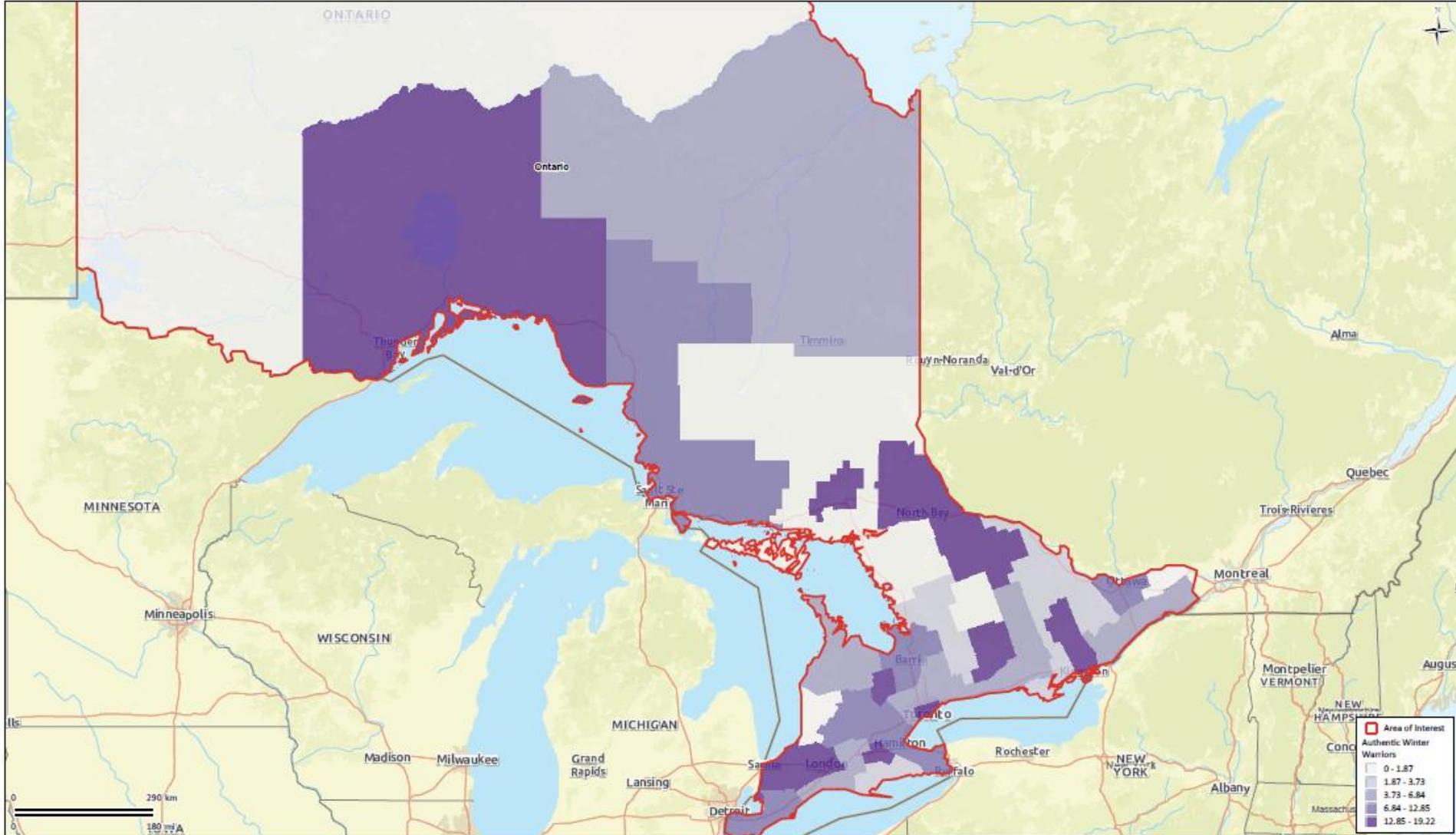- 0 - 2
- 2 - 5.9
- 5.9 - 11.14
- 11.14 - 16.51
- 16.51 - 26.74

AWWs – Ontario Census Divisions (% Penetration)

Authentic Winter Warriors- Ontario
Target Group Penetration: Golden Target Groups

Authentic Winter Warriors (AWW) - Summary

- Authentic Winter Warriors segment accounts for 14% of MobileScapes data (travellers) for Golden; however, this segment accounted for 19% of Winter travellers but only 10% of Summer travellers.

- This segment represents 8% of Canadian households but 14% of BC households, 11% of Ontario households and 10% of Alberta households, which are all over indexed meaning this segment is more prevalent in these Provinces.

- Tends to be well educated with 36% having a University degree which is notably higher than general population.

- Have higher than average household incomes with one-third making $150,000 or more.

- Authentic Winter Warriors are moderate traditional media users and are typical online users. They are, however, heavy social media users. They follow brands on social media and in addition to their high use of Facebook and YouTube, are more likely to use many social media platforms including Whatsapp, LinkedIn, Instagram and Twitter.

- They are notably more likely to be involved in clubs.

- They travel and are more likely to visit BC in the past three year. Specially, 18% visited BC outside the Vancouver/Victoria/Whistler over the past three years. Although they mainly stay in hotels, they are more likely to stay with friends and at vacation rentals.

- This segment is more likely to be located in BC, Alberta and Ontario. Within these market, they have the best penetration in areas known for outdoor recreation (i.e. along the Rockies, Whistler/Pemberton).

2. Diverse Summer Travellers (DST)
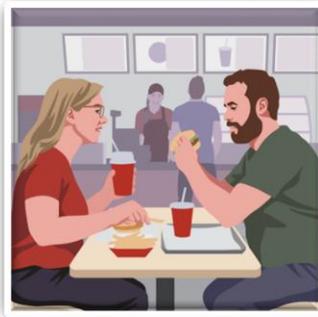
Diverse Summer Travellers (DST) - Summary

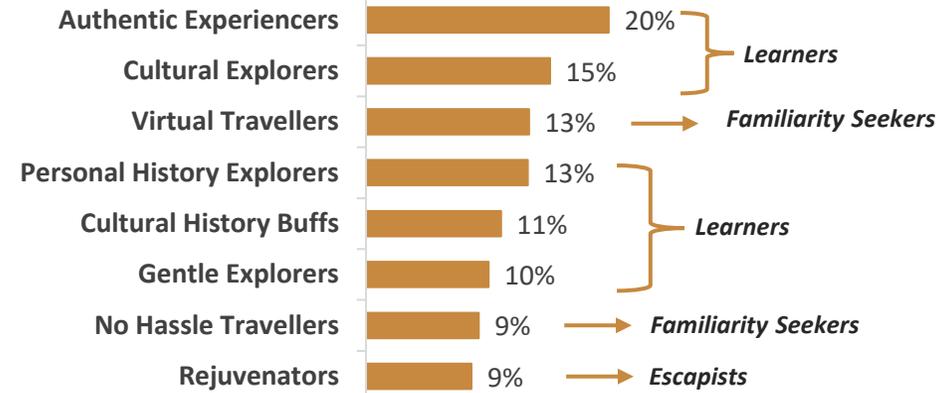## Market Size (Households)

15,031,844 in Canada.

DST HHs

2,334,263 HHs in Canada.

16% of market

Snapshot

Upscale and middle-income urban and suburban, young and older families with a university degree.

EQ Types

EQ Type	%	Group
Authentic Experiencers	20%	Learners
Cultural Explorers	15%	Learners
Virtual Travellers	13%	Familiarity Seekers
Personal History Explorers	13%	Learners
Cultural History Buffs	11%	Learners
Gentle Explorers	10%	Learners
No Hassle Travellers	9%	Familiarity Seekers
Rejuvenators	9%	Escapists

PRIZM Lifestyle Groups in the Diverse Summer Learners Segment

15% — **52 FRIENDS & ROOMIES**
- Young, diverse lower-middle-income city dwellers.
- Younger Urban Mix
- Younger Singles & Couples

13% — **11 MODERN SUBURBIA**
- Multi-ethnic younger and middle-aged suburbanites.
- Upscale Suburban Diversity
- Young Families

13% — **23 MID-CITY MELLOW**
- Older and mature city homeowners.
- Urban Older
- Older Families & Empty Nests

11% — **32 DIVERSE & DETERMINED**
- Midscale, younger and middle-aged city dwellers.
- Midscale Urban Fringe
- School-Age Families

10% — **60 VALUE VILLAGERS**
- Lower-middle-income city dwellers.
- Younger Urban Mix
- School-Age Families

10% — **07 MATURE & SECURE**
- Older and mature upscale city dwellers.
- Upscale Urban Fringe
- Older Families & Empty Nests

10% — **05 FIRST-CLASS FAMILIES**
- Large, well-off suburban families.
- Suburban Elite
- Large Diverse Families

9% — **36 MIDDLE-CLASS MOSAIC**
- Middle-income urban homeowners.
- Urban Older
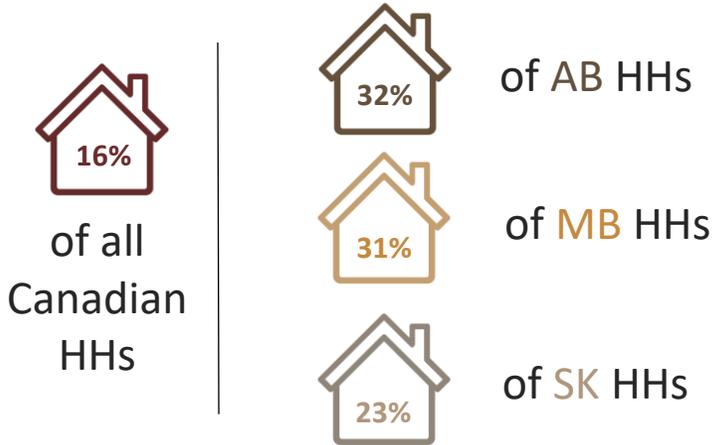- Middle-Age Families

9% — **45 SLOW-LANE SUBURBS**
- Older and mature suburban singles and couples.
- Older Suburban
- Older Families & Empty Nests

DSTs - Demographics

DST HHs

16% of all Canadian HHs

- 32% of AB HHs
- 31% of MB HHs
- 23% of SK HHs

Age

Age	General Population	Diverse Summer Learners
< 19	21%	22%
20-24	6%	7%
25-34	14%	15%
35-44	13%	14%
45-54	13%	13%
55-64	14%	13%
65-74	11%	10%
75+	8%	7%
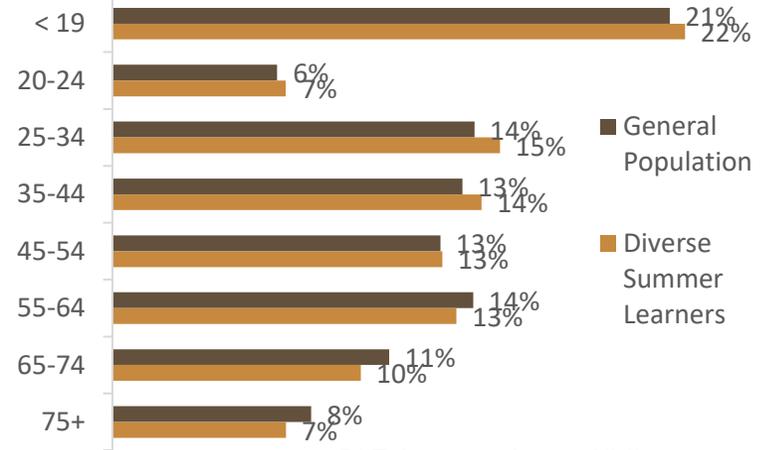
DST Average Age = 40.3
General Pop. Average Age = 41.5

HH Income ($ CND)

Income	General Population	Diverse Summer Learners
<$20,000	4%	3%
$20,000 to $39,999	18%	15%
$40,000 to $59,999	14%	13%
$60,000 to $79,999	13%	13%
$80,000 to $99,999	11%	11%
$100,000 to $149,999	19%	21%
$150,000+	21%	24%
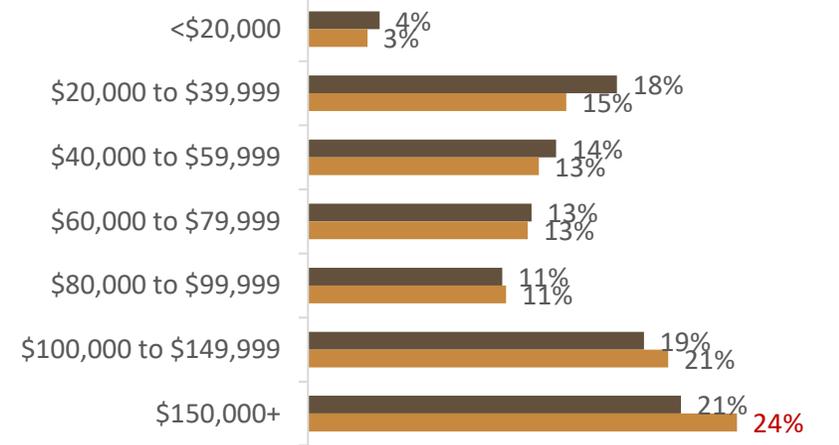
DST Average HH Income = $115,821
General Pop. Average HH Income = $109,506

DST Demographics

- 31% are visible minorities
- 27% are immigrants
- 86% speak English
- 12% speak English & French

DST Education

- No Certificate, Diploma Or Degree, 13%
- Secondary School Diploma, 28%
- Trade Certificate or College Diploma, 30%
- University Undergraduate Degree, 29%
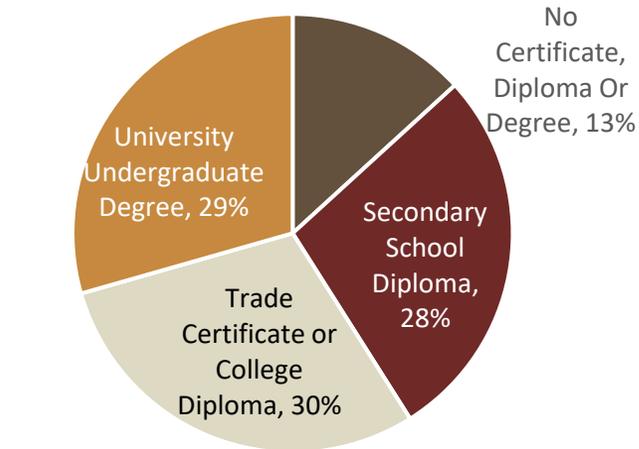
29% DST have University Degree
26% General Pop have University Degree

DST Family Structure

57% married/common law

46% with children at home
- **34%** are < 10 years old
- **34%** are 10-19
- **32%** are 20+

2.62 average persons in households
73% occupy a detached house
72% own their accommodation

DSTs – Traditional Media Highlights

Overall Media Use

- TV: Moderate
- Radio: Moderate/Light
- Newspapers: Moderate
- Magazines: Moderate
- OOH: Light

Print Media – Daily Newspaper

30% read the daily newspaper yesterday
7% read the community newspaper yesterday

Top 5 Newspaper Sections Read:
- **55%** Local & regional news
- **51%** National news
- **49%** International/world
- **33%** Movie & entertainment
- **31%** Health
- **24%** read the Travel section

Radio

67% listened to the radio yesterday

Top 5 Radio Program Reach:
- **25%** News/Talk
- **19%** Mainstream Top 40
- **18%** Adult Contemporary
- **15%** Classic Hits
- **13%** Today's Country

*DST radio listeners were more likely than the general population to listen to **religious, modern/alternative rock, sports, all news, classic rock** and **jazz**.*

Out of Home

Moderate index scores on noticing out of home advertising, but direct mailers such as coupons and emails have high index scores.

Top 5 Places Advertising Noticed:
- **31%** Billboards
- **23%** On Bus Exteriors
- **19%** Digital Billboards
- **18%** On Street Furniture
- **16%** Inside shopping malls

Noticed in past week.

*DSTs were more likely than the general population to notice advertising on **transit shelters**, inside **commuter trains** and **airports**.*

Print Media – Magazine

17% read a magazine yesterday

Top 5 Magazines Read:
- **10%** CAA Magazine
- **7%** Other English-Canadian
- **7%** Other U.S. Magazines
- **6%** Canadian Living
- **6%** Maclean's

*DSTs were more likely to read **People, Style at Home, Cineplex, Fashion Magazine** and **Hello! Canada** magazines among many other titles.*

TV

Moderate index scores for watching TV

*DST TV watchers were more likely than the general population to watch **CFL football** programming, and spend more hours watching speciality and digital networks like **Teletoon, Headline News, AMC, Crave TV, Family Channel** and **The Learning Channel** networks, among many others.*

DSTs – Online Habits

Online Behaviour – General Use

Overall Internet Use:
27% Light
30% Moderate
34% Heavy

Used Internet Yesterday:

85%

Time Spent Online:

0-5 hours	5-10 hours	10-15 hours	15-25 hours	25 hours+
5%	13%	12%	22%	37%

Hours spent on the internet on weekdays

Online Behaviour – Selected Activities

Activity	%
Send/receive email	70%
Send/receive a text/instant message	64%
Participate in an online social network	55%
Take pictures/video	54%
Do banking/pay bills online	53%
Use apps	53%
Use maps/directions service	50%
Internet search - business, services, products	43%
Access a news site	40%
Watch a subscription-based video service	39%

Activities in past week.

Mobile Behaviour – Selected Activities

Activity	%
Send/receive a text/instant message	59%
Send/receive email	52%
Take pictures/video	51%
Use apps	49%
Participate in an online social network	44%
Use maps/directions service	42%
Do banking/pay bills online	30%
Internet search - business, services, products	29%
Access a news site	27%
Watch free streaming music videos	23%

Activities in past week.

DSTs – Social Media

Overall Social Media Use

High

59% participate in online social media networks yesterday
25% have more than 300 friends

Social Media Currently Use

Facebook 78% **YouTube** 71% **WhatsApp** 44%

LinkedIn 43% **Instagram** 41% **Twitter** 30%

Pinterest 28% **Snapchat** 13% **TikTok** 7%

Overall, DSTs are very active social media users with Facebook and YouTube being their primary SM platforms. They are notably more likely to actively use WhatsApp, LinkedIn, Instagram, Twitter, Snapchat, Podcasts and Reddit apps than the general population. Also, DSTs are also more likely to listen to radio or stream music, read blogs, read status updates/tweets, view friend's photos, watch videos online, participate in online forums and share their GPS location/check in with locations about every day.

Reasons to _follow_ brands through Social Media

18% follow more than 5 brands

30% - To learn about a brand's products /services
29% - To get coupons and discounts
26% - To enter contests
12% - To be among the first to hear brand news
11% - To provide feedback to the brand about their products or services
9% - To engage with content

Reasons to _disengage_ with brands through Social Media
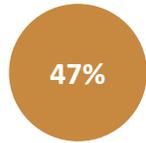
47% have disengaged from a brand

35% - Too many messages
20% - Not enough value
14% - I stopped purchasing products from this brand

Social Media Actions

35% - Like brand on Facebook
18% - Subscribe to brand email newsletter
16% - Follow brand on Instagram
14% - Subscribe to brand channel on YouTube
10% - Follow brand on Twitter
9% - Join an online community of consumers who also like the brand

DSTs – Activities and Attractions

Club Membership

High index scores for club membership
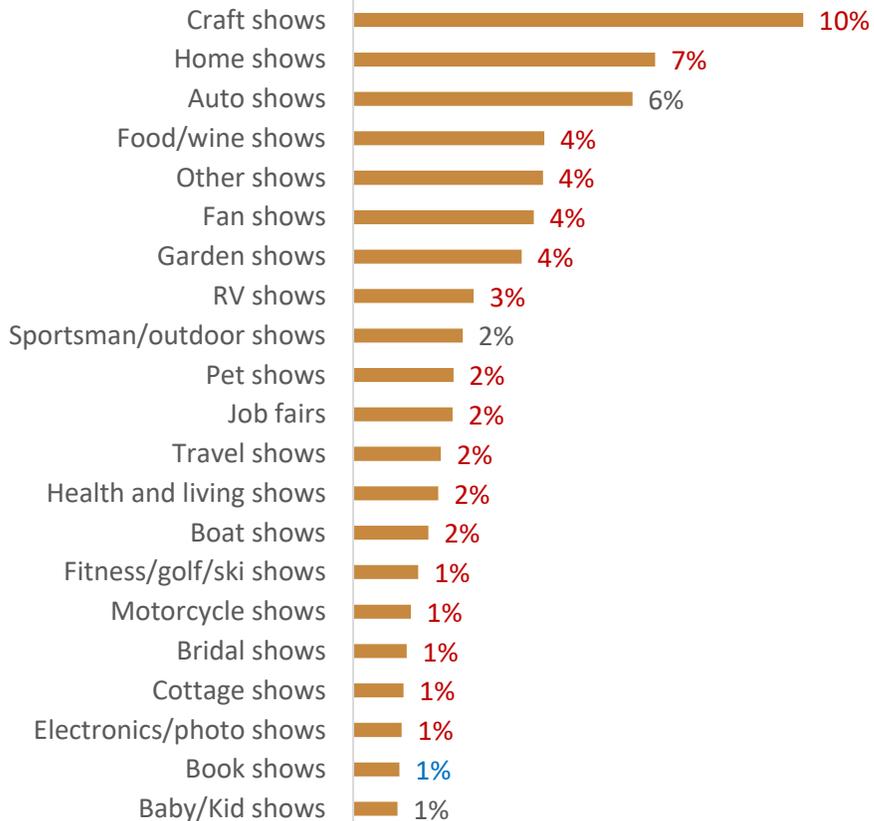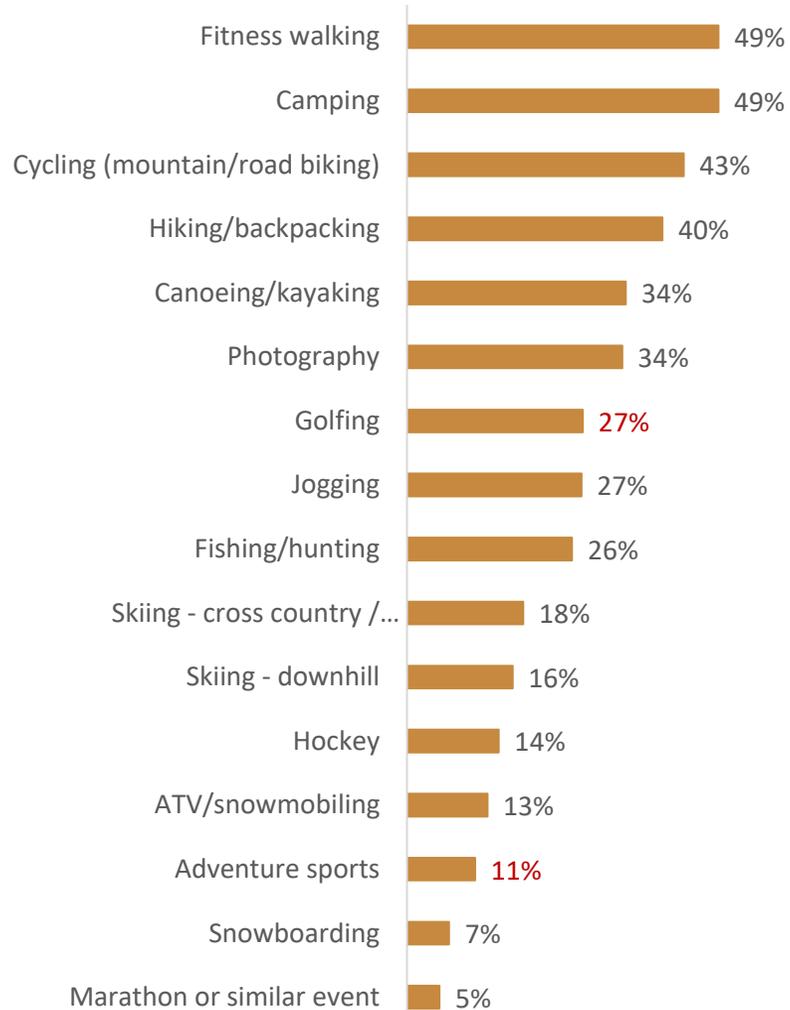
22% were a member of a fitness club
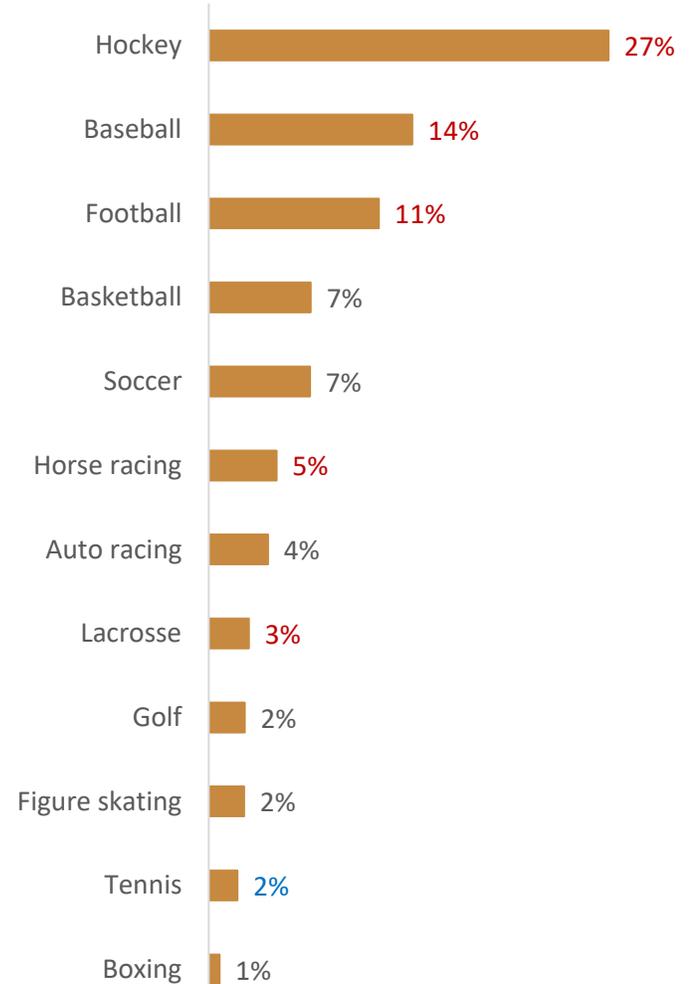**3%** were a member of a golf club

Consumer Shows Attended in Past Year

Show	Percentage
Craft shows	10%
Home shows	7%
Auto shows	6%
Food/wine shows	4%
Other shows	4%
Fan shows	4%
Garden shows	4%
RV shows	3%
Sportsman/outdoor shows	2%
Pet shows	2%
Job fairs	2%
Travel shows	2%
Health and living shows	2%
Boat shows	2%
Fitness/golf/ski shows	1%
Motorcycle shows	1%
Bridal shows	1%
Cottage shows	1%
Electronics/photo shows	1%
Book shows	1%
Baby/Kid shows	1%

Selected Outdoor Activity Participation
(Occasional or Regular Participation)

Activity	Percentage
Fitness walking	49%
Camping	49%
Cycling (mountain/road biking)	43%
Hiking/backpacking	40%
Canoeing/kayaking	34%
Photography	34%
Golfing	27%
Jogging	27%
Fishing/hunting	26%
Skiing - cross country /...	18%
Skiing - downhill	16%
Hockey	14%
ATV/snowmobiling	13%
Adventure sports	11%
Snowboarding	7%
Marathon or similar event	5%

Attendance at Live Professional Sporting Events
(Occasional or Regular Participation)

Sport	Percentage
Hockey	27%
Baseball	14%
Football	11%
Basketball	7%
Soccer	7%
Horse racing	5%
Auto racing	4%
Lacrosse	3%
Golf	2%
Figure skating	2%
Tennis	2%
Boxing	1%

DSTs – General Travel Behaviour

Frequency of Travel

Pie chart:
- 19% — 0 Trips
- 24% — 1-2 Trips
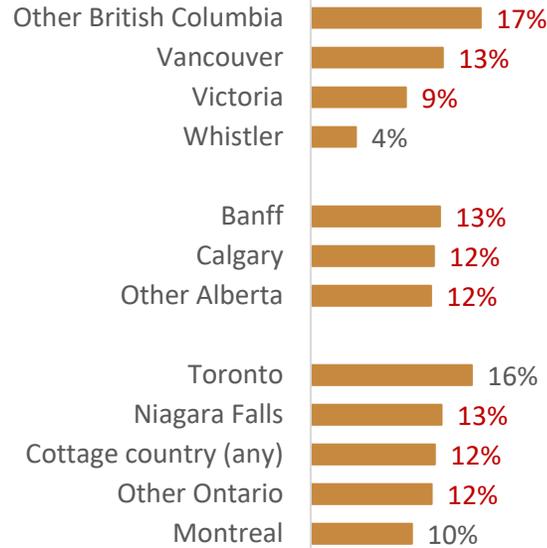- 30% — 3-4 Trips
- 28% — 5+ Trips

Taken in the past 3 years

3.6
Avg. out-of-town vacations taken in the past 3 years

Vacation Destinations

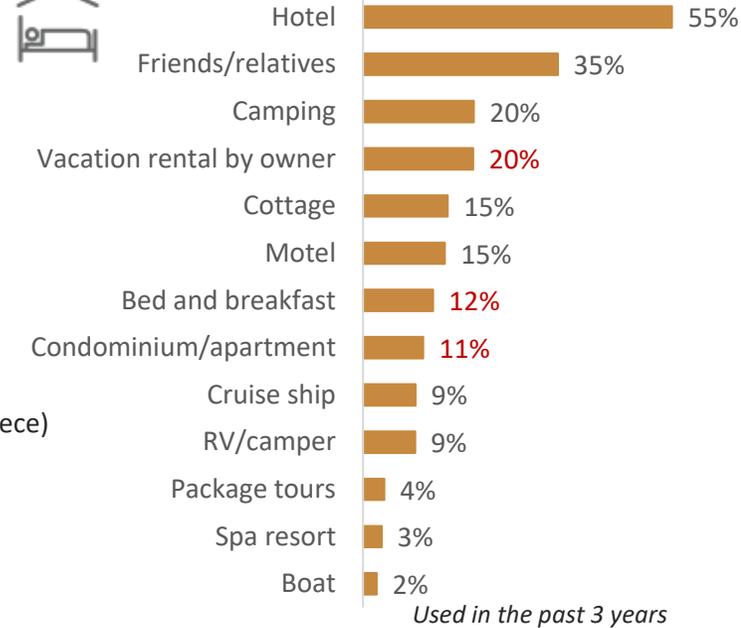### Top Canadian Destinations

Visited in the past 3 years

- Other British Columbia — **17%**
- Vancouver — **13%**
- Victoria — **9%**
- Whistler — 4%

- Banff — **13%**
- Calgary — **12%**
- Other Alberta — **12%**

- Toronto — 16%
- Niagara Falls — **13%**
- Cottage country (any) — **12%**
- Other Ontario — **12%**
- Montreal — 10%

Top US
- **12%** Florida
- **8%** Other Western US
- **7%** Las Vegas
- **6%** New York City
- **6%** Other Southern US

Top Overseas
- **12%** Mexico
- **10%** Other Europe (Incl. Turkey, Greece)
- **10%** Other Caribbean
- **9%** United Kingdom/Republic of Ireland
- **5%** France

Vacation Accommodations

Used in the past 3 years

- Hotel — 55%
- Friends/relatives — 35%
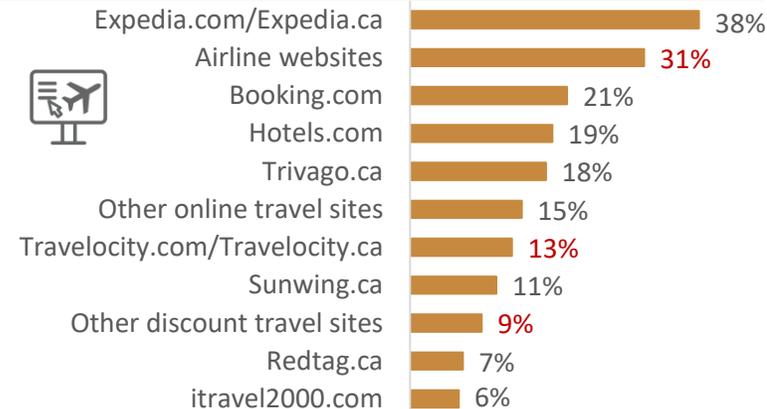- Camping — 20%
- Vacation rental by owner — **20%**
- Cottage — 15%
- Motel — 15%
- Bed and breakfast — **12%**
- Condominium/apartment — **11%**
- Cruise ship — 9%
- RV/camper — 9%
- Package tours — 4%
- Spa resort — 3%
- Boat — 2%

Amount Spent on Last Vacation

- Under $500 — 30%
- $500 - $999 — 18%
- $1,000 - $1,999 — 20%
- $2,000 - $2,999 — 11%
- $3,000 - $3,999 — 7%
- $4,000 or more — 15%

$1,650
Avg. spend on last trip

Vacation Services Bookings

Used in the past 3 years

- Book through a hotel directly — 40%
- Book through an airline directly — 38%
- Book through an on-line travel agency — **35%**
- Book through airline/hotel website — **28%**
- Book through a full service travel agent — 22%
- Book a package tour — 11%
- Book through a discount/last minute… — 9%

Booking Websites Visited

Visited in past year

- Expedia.com/Expedia.ca — 38%
- Airline websites — **31%**
- Booking.com — 21%
- Hotels.com — 19%
- Trivago.ca — 18%
- Other online travel sites — 15%
- Travelocity.com/Travelocity.ca — **13%**
- Sunwing.ca — 11%
- Other discount travel sites — **9%**
- Redtag.ca — 7%
- itravel2000.com — 6%
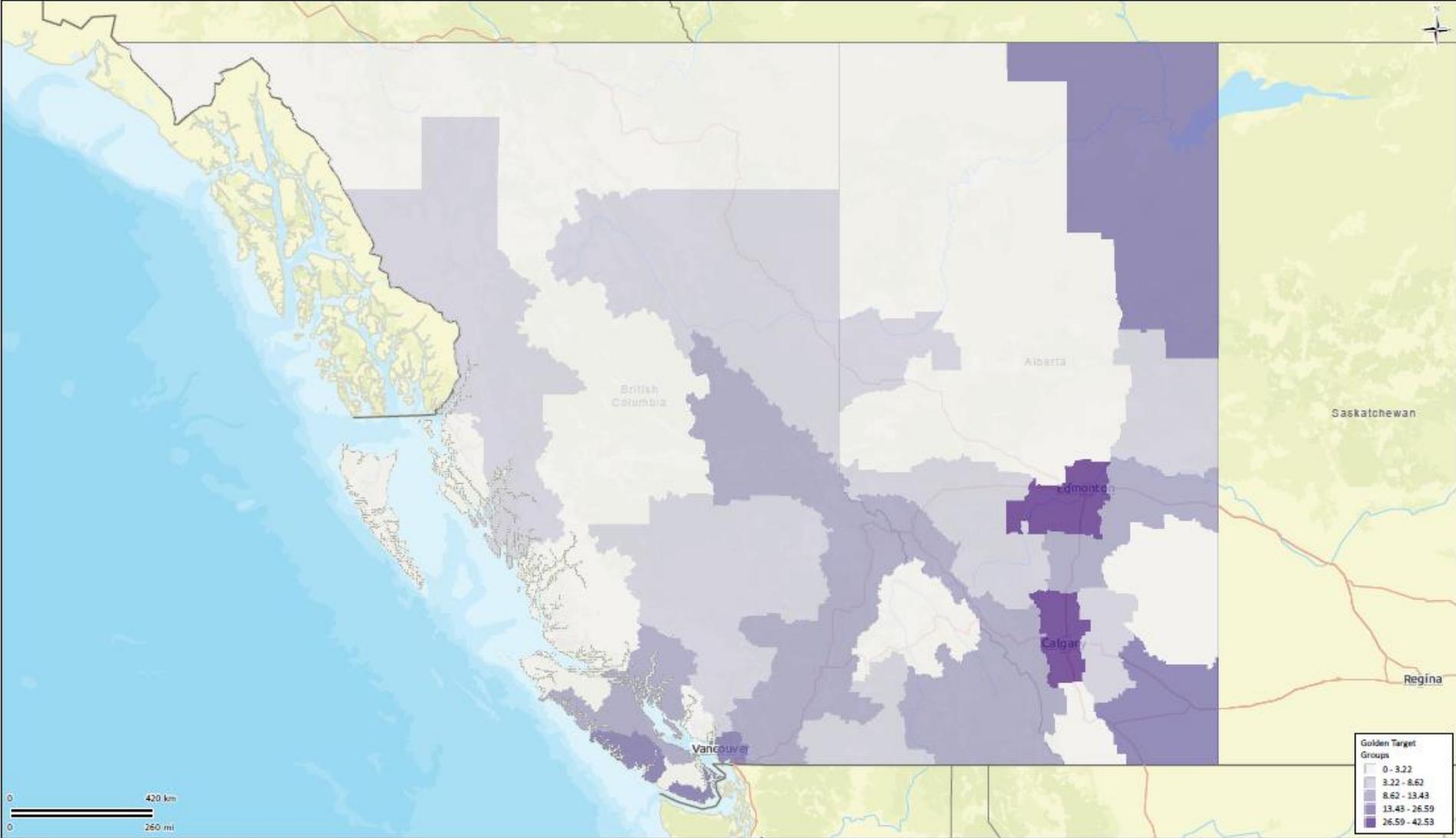
DSTs – BC/AB Census Divisions (% Penetration)

Diverse Summer Learners
Target Group Penetration: Golden Target Groups

DSTs – Ontario Census Divisions (% Penetration)
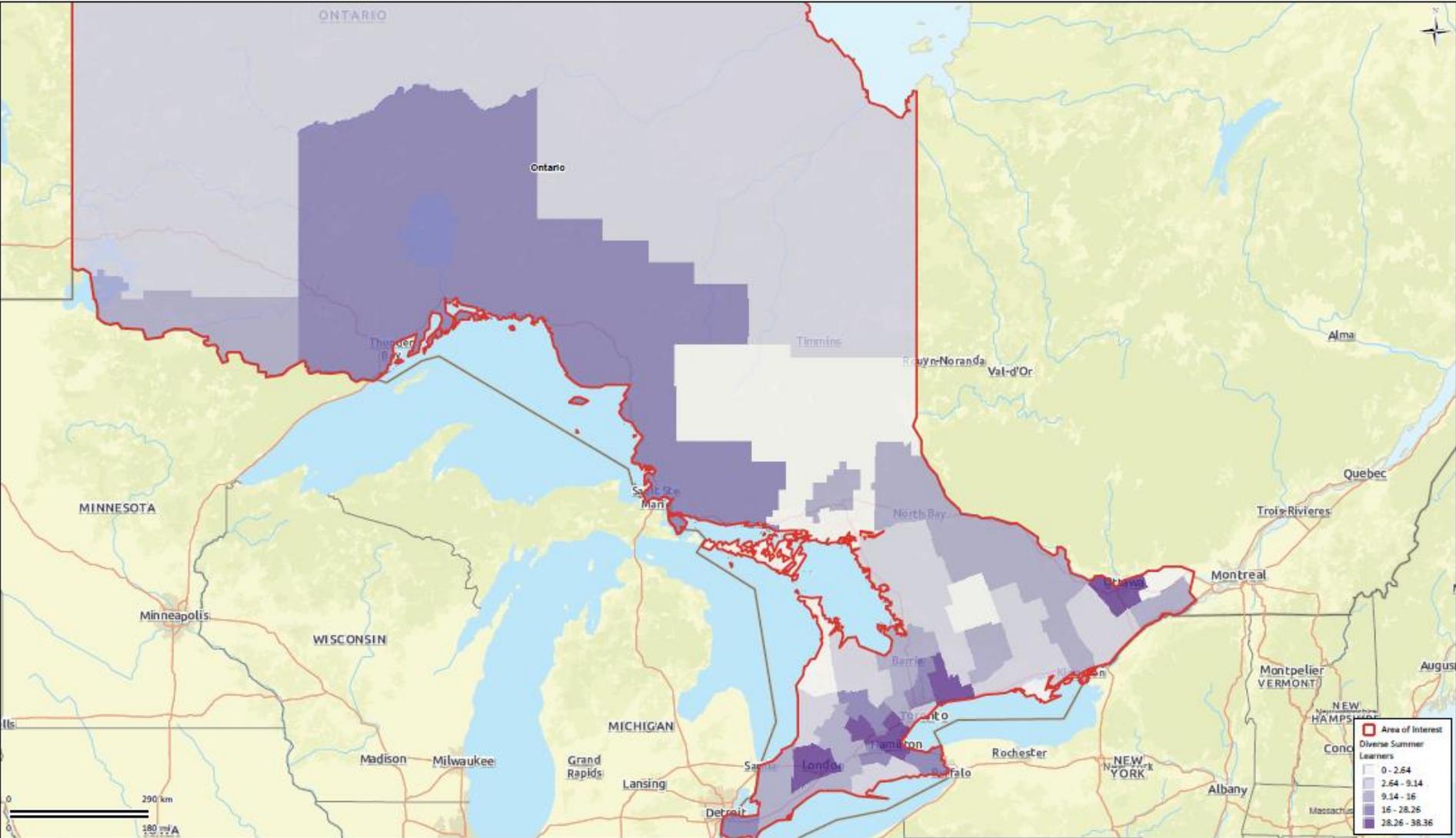

Diverse Summer Learners- Ontario
Target Group Penetration: Golden Target Groups

Diverse Summer Travellers (DST) - Summary

- Diverse Summer Travellers segment accounts for 22% of MobileScapes data (travellers) for Golden; however, this segment accounted for 27% of Summer travellers but only 16% of Winter travellers.

- This segment represents 16% of Canadian households but is over indexed for households in Alberta (32%), Manitoba (31%), Saskatchewan (23%) and Ontario (18%).

- Tends to be well educated with 29% having a University degree which is notably higher than general population and more likely to live in a detached home.

- This segment is more likely to be visible minorities (31%), immigrants (27%).

- Diverse Summer Travellers are moderate traditional media users being more likely to watch CFL football on TV and listen to Mainstream Top 40 on the radio. They are heavy online and social media users. They follow brands on social media (particularly Instagram and Twitter) and in addition to their high use of Facebook and YouTube, are more likely to use many social media platforms including Whatsapp, LinkedIn, Instagram and Twitter.

- They are notably more likely to be belong to a fitness club and attend a range of consumer shows.

- They travel and are more likely to visit BC in the past three year. Specially, 17% visited BC outside the Vancouver/Victoria/Whistler over the past three years. Although they mainly stay in hotels, they are more likely to stay at vacation rentals, B&Bs and Condo/Apartments.

- Within BC, Alberta and Ontario, this segment is more likely to be located in Edmonton, Calgary, Ottawa, Hamilton and London.

3. Rural Year-Round Rejuvenators
(RYRR)
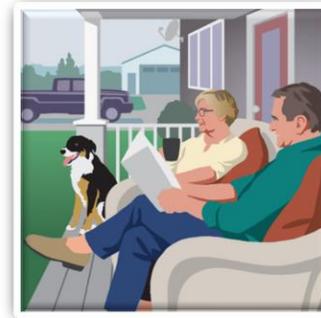
Rural Year-Round Rejuvenators (RYRR) - Summary

Market Size (Households)

15,031,844 in Canada

RYRR HHs

1,204,224 HHs in Canada

8% of market

Snapshot

Older and middle-aged couples and families, upscale and middle-income rural homeowners with a technical degree. Most with children between 10-19 at home.

EQ Types
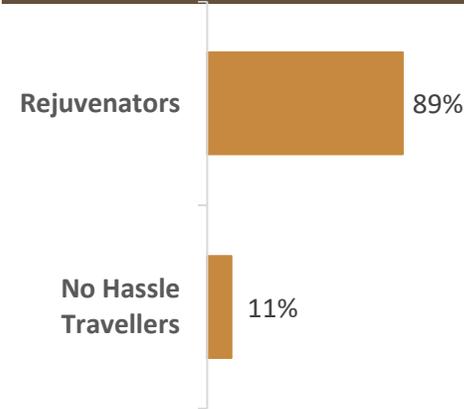
Rejuvenators — 89%

No Hassle Travellers — 11%

Rejuvenators are escapists that are family-oriented, travel to escape, love to indulge and be pampered.
→ *Escapists*

No Hassle Travellers are familiarity seekers and are cautious, dutiful and reserved. They seek secure group travel and want to escape from the duties and obligations of life.
→ *Familiarity Seekers*

PRIZM Lifestyle Groups in the Rural Year-Round Rejuvenators Segment

33%

41 DOWN TO EARTH
- Older, middle-income rural couples and families.
- Lower-Middle Rural
- Older Families & Empty Nests

22%

50 COUNTRY & WESTERN
- Older, middle-income western homeowners.
- Lower-Middle Rural
- Mature Singles & Couples

18%

33 NEW COUNTRY
- Middle-aged, middle-income rural couples and families.
- Upper-Middle Rural
- Middle-Age Families

16%

14 KICK-BACK COUNTRY
- Rural, middle-aged upscale families and couples.
- Upper-Middle Rural
- Middle-Age Families

11%

48 AGRI-BIZ
- Middle-income farmers and blue-collar workers.
- Lower-Middle Rural
- Middle-Age Families

RYRRs - Demographics

RYRR HHs

8% of all Canadian HHs

28% of SK HHs
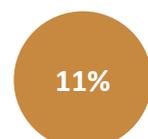
27% of PEI HHs

20% of MB HHs

Age

Age	General Population	Rural Year-Round Rejuvenators
< 19	21%	23%
20-24	6%	6%
25-34	14%	11%
35-44	13%	12%
45-54	13%	12%
55-64	14%	16%
65-74	11%	13%
75+	8%	8%

RYRR Average Age = 42.5
General Pop. Average Age = 41.5

HH Income ($ CND)

Income	General Population	Rural Year-Round Rejuvenators
<$20,000	4%	4%
$20,000 to $39,999	18%	17%
$40,000 to $59,999	14%	14%
$60,000 to $79,999	13%	13%
$80,000 to $99,999	11%	11%
$100,000 to $149,999	19%	20%
$150,000+	21%	21%

RYRR Average HH Income = $106,101
General Pop. Average HH Income = $109,506

RYRR Demographics

3% are visible minorities

8% are immigrants

93% speak English

6% speak English & French

RYRR Education

- University Undergraduate Degree, 14%
- No Certificate, Diploma Or Degree, 21%
- Secondary School Diploma, 30%
- Trade Certificate or College Diploma, 36%

14% RYRR have University Degree
26% General Pop have University Degree

RYRR Family Structure

64% married/common law

48% with children at home
37% are < 10 years old
38% are 10-19
25% are 20+

2.59 average persons in households
89% occupy a detached house
82% own their accommodation

RYRRs – Traditional Media Highlights

Overall Media Use

TV: Heavy

Radio: Heavy

Newspapers: Light

Magazines: Light

OOH: Light

Print Media – Daily Newspaper

30% read the daily newspaper yesterday
11% read the community newspaper yesterday

Top 5 Newspaper Sections Read:
54% Local & regional news
50% National news
46% International/world
32% Health
31% Editorials
24% read the Travel section

*RYRRs were more likely to read the **Classified ads (excl. real estate)** and **New homes** sections.*

Radio

68% listened to the radio yesterday

Top 5 Radio Program Reach:
22% News/Talk
20% Today's Country
17% Classic Hits
14% Adult Contemporary
12% Hot Adult Contemporary

*RYRR radio listeners were more likely than the general population to listen to **classic country**, **classic rock**, **oldies** and **religious**.*

Out of Home

Low index scores on noticing out of home advertising, but direct mailers such as flyers inside community newspapers and yellow papers have high index scores.

Top 5 Places Advertising Noticed:
25% Billboards
15% On Bus Exteriors   **17%** Inside shopping malls
14% Digital Billboards   **16%** On Street Furniture
Noticed in past week.

Print Media – Magazine

15% read a magazine yesterday, more likely to be light magazine readers.

Top 5 Magazines Read:
10% CAA Magazine   **6%** Canadian Living
6% Other English-Canadian **6%** Maclean's
6% Other U.S. Magazines

*RYRRs were more likely to read **Our Canada, Outdoor Canada, Cottage Life, Good Housekeeping** and **Better Homes & Gardens** magazines among many other titles.*

TV

More likely to be heavy TV watchers

*RYRR TV watchers were more likely than the general population to watch **curling** and **other sports** programming. They also spend more hours watching speciality and digital networks like **CMT, OLN, Dtour, Discovery Channel, History Channel** and **Oprah Winfrey** network, among many others.*

RYRRs – Online Habits

Online Behaviour – General Use

Overall Internet Use:
29% Light
30% Moderate
30% Heavy

Used Internet Yesterday:

82%

Time Spent Online:

0-5 hours	5-10 hours	10-15 hours	15-25 hours	25 hours+
6%	15%	12%	22%	32%

Hours spent on the internet on weekdays

Online Behaviour – Selected Activities

Activity	%
Send/receive email	67%
Send/receive a text/instant message	63%
Participate in an online social network	56%
Take pictures/video	51%
Do banking/pay bills online	48%
Use apps	48%
Use maps/directions service	45%
Internet search - business, services,…	40%
Access a news site	39%
Watch a subscription-based video service	35%

Activities in past week.

Mobile Behaviour – Selected Activities

Activity	%
Send/receive a text/instant message	59%
Take pictures/video	48%
Send/receive email	48%
Use apps	43%
Participate in an online social network	42%
Use maps/directions service	36%
Internet search - business, services,…	27%
Do banking/pay bills online	26%
Access a news site	26%
Watch free streaming music videos	19%

Activities in past week.

RYRRs – Social Media

Overall Social Media Use

Light

59% participate in online social media networks yesterday
17% have more than 300 friends

Social Media Currently Use

Facebook 82%   **YouTube** 66%   **Pinterest** 35%

Instagram 30%   **LinkedIn** 29%   **WhatsApp** 25%

Twitter 21%   **Snapchat** 10%   **TikTok** 5%

Overall, RYRRs are light social media users. They are less likely than the general population to follow brands, share stories or post items on social media sites. They are more likely than the general population to use Pinterest.

Reasons to <u>follow</u> brands through Social Media

14% follow more than 5 brands

28% - To learn about a brand's products /services
27% - To get coupons and discounts
24% - To enter contests
9% - To be among the first to hear brand news
8% - To provide feedback to the brand about their products or services
6% - To engage with content

Reasons to <u>disengage</u> with brands through Social Media
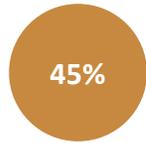
45% have disengaged from a brand

32% - Too many messages
17% - Not enough value
14% - I stopped purchasing products from this brand

Social Media Actions

34% - Like brand on Facebook
15% - Subscribe to brand email newsletter
10% - Follow brand on Instagram
9% - Subscribe to brand channel on YouTube
8% - Join an online community of consumers who also like the brand
5% - Follow brand on Twitter

RYRRs – Activities and Attractions

Club Membership

Moderate index scores for club membership

16% were a member of a fitness club
2% were a member of a golf club

Consumer Shows Attended in Past Year

Show	%
Craft shows	10%
Auto shows	7%
Home shows	5%
Other shows	4%
Food/wine shows	4%
Garden shows	3%
Fan shows	3%
RV shows	3%
Sportsman/outdoor shows	3%
Pet shows	2%
Boat shows	2%
Job fairs	1%
Fitness/golf/ski shows	1%
Health and living shows	1%
Travel shows	1%
Motorcycle shows	1%
Cottage shows	1%
Baby/Kid shows	1%
Book shows	1%
Bridal shows	1%
Electronics/photo shows	0%

Selected Outdoor Activity Participation
(Occasional or Regular Participation)

Activity	%
Camping	51%
Fitness walking	48%
Cycling (mountain/road biking)	46%
Hiking/backpacking	40%
Canoeing/kayaking	35%
Photography	34%
Fishing/hunting	33%
Golfing	29%
Jogging	25%
ATV/snowmobiling	22%
Skiing - cross country /…	21%
Skiing - downhill	17%
Hockey	15%
Adventure sports	10%
Snowboarding	6%
Marathon or similar event	5%

Attendance at Live Professional Sporting Events
(Occasional or Regular Participation)

Sport	%
Hockey	29%
Baseball	13%
Football	9%
Soccer	5%
Basketball	5%
Auto racing	5%
Horse racing	5%
Golf	3%
Figure skating	2%
Lacrosse	2%
Tennis	1%
Boxing	0%

RYRRs – General Travel Behaviour

Frequency of Travel

Pie chart:
- 19% — 0 Trips
- 25% — 1-2 Trips
- 26% — 3-4 Trips
- 30% — 5+ Trips

Taken in the past 3 years

3.6
Avg. out-of-town vacations taken in the past 3 years

Vacation Destinations

Top Canadian Destinations

Visited in the past 3 years

- Other British Columbia — 17%
- Vancouver — 12%
- Victoria — 8%
- Whistler — 3%

- Other Alberta — 16%
- Calgary — 14%
- Banff — 12%

- Toronto — 13%
- Other Ontario — 11%
- Cottage country (any) — 10%
- Niagara Falls — 9%
- Saskatchewan — 8%

Top US

- 11% Florida
- 8% Other Western US
- 6% Other Southern US
- 6% Las Vegas
- 6% New York City

Top Overseas

- 12% Mexico
- 8% Other Europe (Incl. Turkey, Greece)
- 7% Other Caribbean
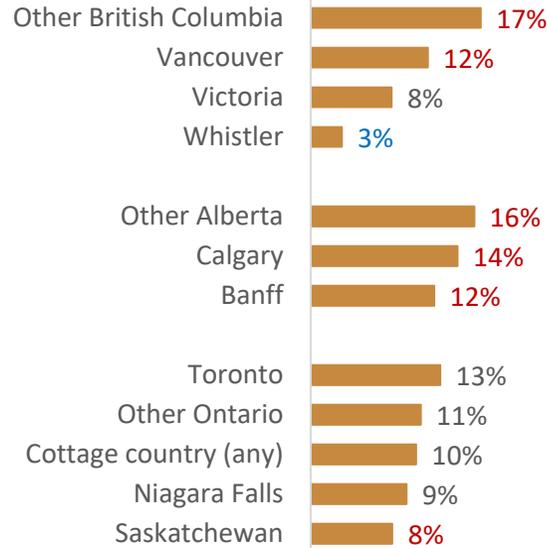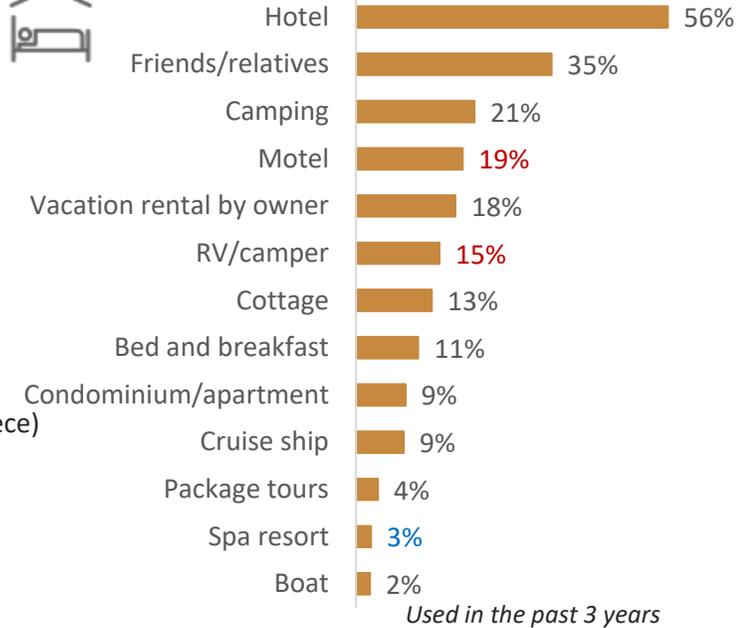- 5% United Kingdom/Republic of Ireland
- 4% Cuba

Vacation Accommodations

Used in the past 3 years

- Hotel — 56%
- Friends/relatives — 35%
- Camping — 21%
- Motel — 19%
- Vacation rental by owner — 18%
- RV/camper — 15%
- Cottage — 13%
- Bed and breakfast — 11%
- Condominium/apartment — 9%
- Cruise ship — 9%
- Package tours — 4%
- Spa resort — 3%
- Boat — 2%

Amount Spent on Last Vacation

- Under $500 — 30%
- $500 - $999 — 16%
- $1,000 - $1,999 — 22%
- $2,000 - $2,999 — 11%
- $3,000 - $3,999 — 8%
- $4,000 or more — 13%

$1,657 Avg. spend on last trip

Vacation Services Bookings

Used in the past 3 years

- Book through a hotel directly — 40%
- Book through an airline directly — 36%
- Book through an on-line travel agency — 28%
- Book through airline/hotel website — 26%
- Book through a full service travel agent — 24%
- Book a package tour — 12%
- Book through a discount/last minute… — 6%

Booking Websites Visited

Visited in past year

- Expedia.com/Expedia.ca — 33%
- Airline websites — 26%
- Booking.com — 18%
- Hotels.com — 16%
- Trivago.ca — 15%
- Other online travel sites — 12%
- Travelocity.com/Travelocity.ca — 11%
- Sunwing.ca — 10%
- Other discount travel sites — 7%
- Redtag.ca — 6%
- itravel2000.com — 6%

RYRRs – BC/AB Census Divisions (% Penetration)

Rural Year-Round Rejuvenators
Target Group Penetration: Golden Target Groups

RYRRs – Ontario Census Divisions (% Penetration)

Rural Year-Round Rejuvenators- Ontario
Target Group Penetration: Golden Target Groups

Area of Interest
Golden Target Groups
0 - 5.76
5.76 - 15.6
15.6 - 28.22
28.22 - 41.38
41.38 - 63.77

Rural Year-Round Rejuvenators (RYRR) - Summary

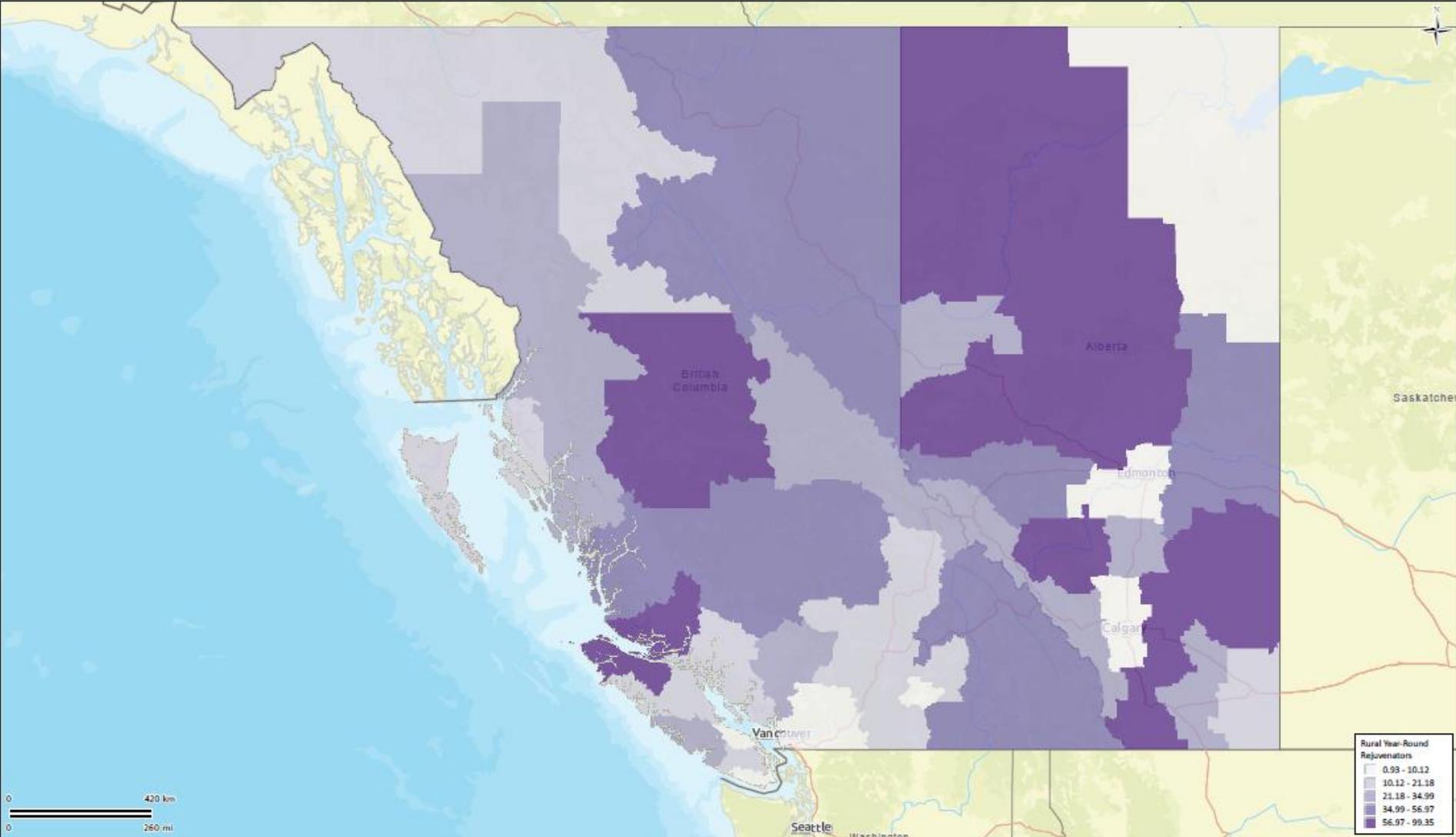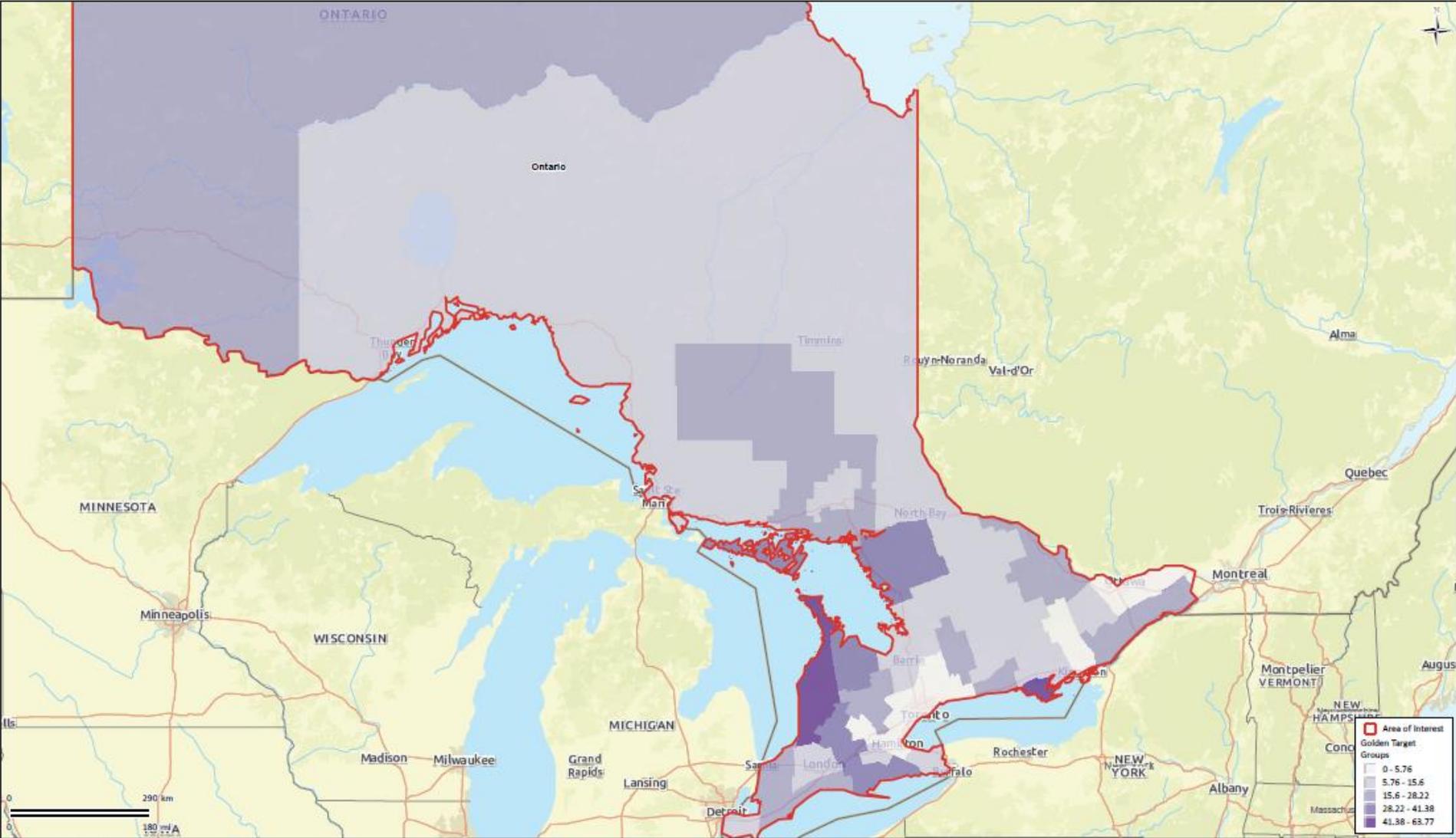- Rural Year-Round Rejuvenators segment accounts for 12% of MobileScapes data (travellers) for Golden. This is consistent between seasons as this segment accounted for 12% of Winter and 13% of Summer travellers.

- This segment represents 8% of Canadian households but is over indexed for households in all Provinces except Ontario and Quebec. The highest penetration of this segment is in Saskatchewan (28%), PEI (27%), and Manitoba (20%).

- Tends to be less educated but more likely to own their detached home. They are more likely to have kids at home, particularly those aged 10-19.

- Rural Year-Round Rejuvenators are heavy TV and Radio users being more likely to watch sports programming, especially curling, and listen to Today's Country. They are average online users and light social media users. Despite being light users, they have standard use of Facebook and YouTube and are more likely to use Pinterest.

- They are notably more likely to participate in Camping, Fishing/Hunting, Golf, and ATV/Snowmobiling.

- They are more likely to be frequent travellers and are more likely to visit BC in the past three year. Specially, 17% visited BC outside the Vancouver/Victoria/Whistler over the past three years. Although they mainly stay in hotels, they are more likely to stay at motels and RV/Campers.

- True to its name, this segment is most likely to be found in rural areas.

4. Year-Round City Escapists (YRCE)

Year-Round City Escapists (RCE) - Summary

Market Size (Households)

15,031,844 in Canada.

YRCE HHs

608,328 HHs in Canada.

4% of market

Snapshot

Urban, upper-middle-income singles, couples and families. Most likely with a university degree and not likely to have children at home.

EQ Types

Authentic Experiencers — 69%

Cultural History Buffs — 19%

No Hassle Travellers — 12%

Authentic Experiencers are understated travellers looking for authentic, tangible engagement with destinations and are very interested in historical travel.

Cultural History Buffs are constant travellers and love to get immersed in local culture, people and settings.

Learners

No Hassle Travellers are familiarity seekers and are cautious, dutiful and reserved. They seek secure group travel and want to escape from the duties and obligations of life.

Familiarity Seekers

PRIZM Lifestyle Groups in the Year-Round City Escapists Segment

54%

16 SAVVY SENIORS
- Upper-middle-income seniors in urban apartments
- Urban Older
- Older Families & Empty Nests

19%

28 LATTE LIFE
- Younger, single urban renters.
- Younger Urban Mix
- Very Young Singles &
- Couples

15%

01 THE A-LIST
- Very wealthy cosmopolitan families and couples.
- Urban Elite
- Older Families & Empty Nests

12%

37 KEEP ON TRUCKING
- Upper-middle-income town homeowners.
- Town Mix
- School-Age Families

YRCEs - Demographics

YRCE HHs

4% of all Canadian HHs

27% of NWT HHs

8% of BC HHs

6% of AB HHs

Age

Age	General Population	Year-Round City Escapists
< 19	21%	18%
20-24	6%	6%
25-34	14%	15%
35-44	13%	13%
45-54	13%	12%
55-64	14%	14%
65-74	11%	12%
75+	8%	10%

YRCE Average Age = 44.1
General Pop. Average Age = 41.5

HH Income ($ CND)

Income	General Population	Year-Round City Escapists
<$20,000	4%	3%
$20,000 to $39,999	18%	15%
$40,000 to $59,999	14%	13%
$60,000 to $79,999	13%	12%
$80,000 to $99,999	11%	10%
$100,000 to $149,999	19%	18%
$150,000+	21%	29%

YRCE Average HH Income = $170,669
General Pop. Average HH Income = $109,506

YRCE Demographics

21% are visible minorities

22% are immigrants

81% speak English

17% speak English & French

YRCE Education

- No Certificate, Diploma Or Degree, 10%
- Secondary School Diploma, 24%
- Trade Certificate or College Diploma, 26%
- University Undergraduate Degree, 40%

40% YRCE have University Degree
26% General Pop have University Degree
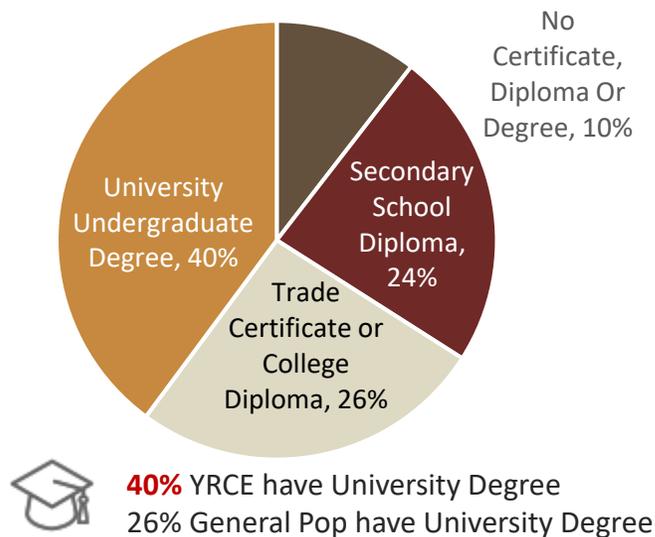
YRCE Family Structure

55% married/common law

47% without children at home

2.26 average persons in households
55% occupy a detached house
44% occupy an apartment
67% own their accommodation

YRCEs – Traditional Media Highlights

Overall Media Use

- TV: Moderate
- Radio: Moderate
- Newspapers: Moderate/Heavy
- Magazines: Moderate
- OOH: Light

Print Media – Daily Newspaper

36% read the daily newspaper yesterday
8% read the community newspaper yesterday

Top 5 Newspaper Sections Read:

60% Local & regional news
58% National news
56% International/world
37% Health
36% Editorials
29% read the Travel section

*YRCEs were more likely to read the **New homes, Business & Financial, Sports, Fashion/Lifestyle** and **Real Estate** sections.*

Radio

67% listened to the radio yesterday

Top 5 Radio Program Reach:

34% News/Talk
17% Adult Contemporary
15% Multi/Variety/Specialty
14% Mainstream Top 40
13% Classic Hits

*YRCE radio listeners were more likely than the general population to listen to **jazz, adult standards, modern/alternative rock, all news, sports** and **classical/fine arts**.*

Out of Home

High index scores on noticing out of home advertising

Top 5 Places Advertising Noticed:

30% Billboards
24% On Bus Exteriors
17% On Street Furniture
17% Digital Billboards
17% On Transit Shelters

Noticed in past week.

*YRCEs were more likely than the general population to notice advertising inside **commuter trains, airports, buses** and **screens inside elevators**.*

Print Media – Magazine

21% read a magazine yesterday, more likely to have usage in all categories (light, moderate, heavy).

Top 5 Magazines Read:

11% CAA Magazine
9% Other English-Canadian
9% Other U.S. Magazines
8% Canadian Living
7% Maclean's

*YRCEs were more likely to read **Report on Business, Zoomer, Style at Home, Time, Cottage Life** and **Fashion** magazines among many other titles.*

TV

Moderate index scores for watching TV

*YRCE TV watchers were more likely than the general population to watch **golf** and **curling** programming, and spend more hours watching speciality and digital networks like **MSNBC US, Headline News, Golf Channel, TCM, Fox News US** and **The Shopping Channel** network, among many others.*

YRCEs – Online Habits

Online Behaviour – General Use

Overall Internet Use:

30% Light
29% Moderate
30% Heavy

Used Internet Yesterday:

83%

Time Spent Online:

0-5 hours	5-10 hours	10-15 hours	15-25 hours	25 hours+
6%	14%	12%	22%	33%

Hours spent on the internet on weekdays

Online Behaviour – Selected Activities

Activity	%
Send/receive email	70%
Send/receive a text/instant message	62%
Do banking/pay bills online	52%
Participate in an online social network	52%
Take pictures/video	51%
Use apps	50%
Use maps/directions service	49%
Internet search - business, services,…	45%
Access a news site	41%
Watch a subscription-based video service	36%

Activities in past week.

Mobile Behaviour – Selected Activities

Activity	%
Send/receive a text/instant message	57%
Send/receive email	49%
Take pictures/video	48%
Use apps	45%
Participate in an online social network	40%
Use maps/directions service	39%
Internet search - business, services,…	28%
Access a news site	26%
Do banking/pay bills online	26%
Watch free streaming music videos	20%

Activities in past week.

YRCEs – Social Media

Overall Social Media Use

Moderate

55% participate in online social media networks
24% have more than 300 friends

Social Media Currently Use

Facebook 77%   **YouTube** 71%   **LinkedIn** 44%

WhatsApp 43%   **Instagram** 39%   **Twitter** 29%

Pinterest 28%   **Podcasts** 21%   **Snapchat** 11%

Overall, YRCEs tend to be less active social media users, with Facebook and YouTube being their primary social media platforms. They are notably more active on LinkedIn, WhatsApp, Twitter and Podcasts than the general population. When they did use social media they were passive users and read posts, tweets and status updates but rarely posted themselves.

Reasons to <u>follow</u> brands through Social Media

17% follow more than 5 brands

30% - To learn about a brand's products /services
27% - To get coupons and discounts
24% - To enter contests
12% - To be among the first to hear brand news
10% - To provide feedback to the brand about their products or services
9% - To engage with content

Reasons to <u>disengage</u> with brands through Social Media
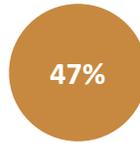
47% have disengaged from a brand

35% - Too many messages
21% - Not enough value
14% - I stopped purchasing products from this brand

Social Media Actions

33% - Like brand on Facebook
18% - Subscribe to brand email newsletter
15% - Follow brand on Instagram
12% - Subscribe to brand channel on YouTube
9% - Join an online community of consumers who also like the brand
9% - Follow brand on Twitter

YRCEs – Activities and Attractions

Club Membership

Moderate index scores for club membership

21% were a member of a fitness club
3% were a member of a golf club

Consumer Shows Attended in Past Year

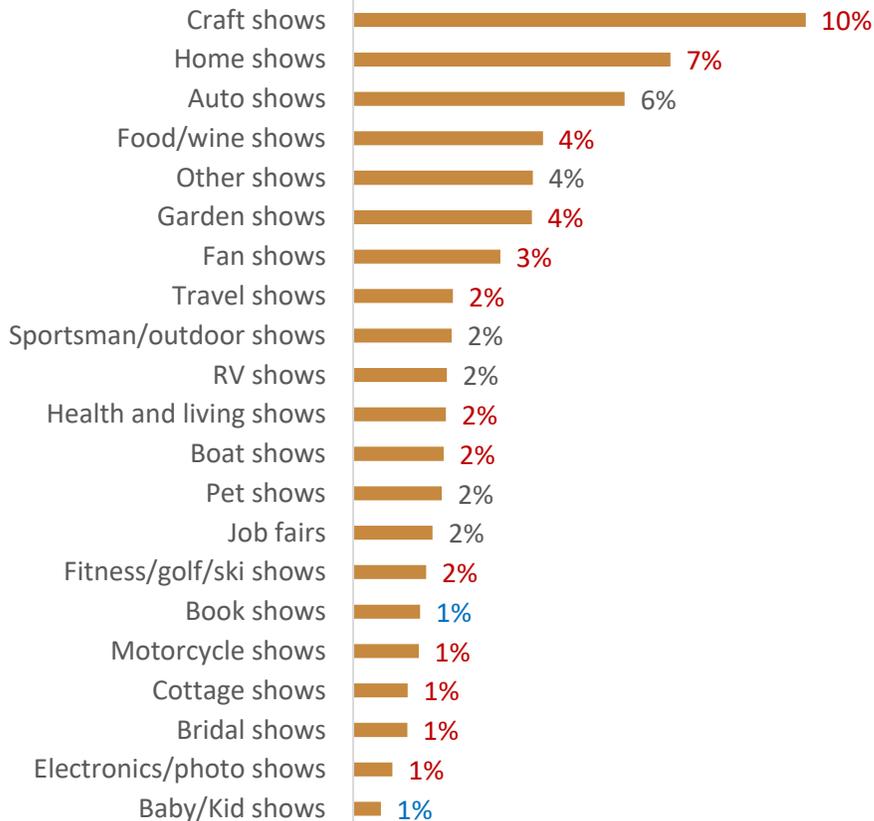| Show	%
Craft shows	10%
Home shows	7%
Auto shows	6%
Food/wine shows	4%
Other shows	4%
Garden shows	4%
Fan shows	3%
Travel shows	2%
Sportsman/outdoor shows	2%
RV shows	2%
Health and living shows	2%
Boat shows	2%
Pet shows	2%
Job fairs	2%
Fitness/golf/ski shows	2%
Book shows	1%
Motorcycle shows	1%
Cottage shows	1%
Bridal shows	1%
Electronics/photo shows	1%
Baby/Kid shows	1%

Selected Outdoor Activity Participation
(Occasional or Regular Participation)

Activity	%
Fitness walking	52%
Camping	45%
Cycling (mountain/road biking)	42%
Hiking/backpacking	41%
Photography	34%
Canoeing/kayaking	34%
Golfing	26%
Jogging	25%
Fishing/hunting	24%
Skiing - cross country /…	21%
Skiing - downhill	17%
Hockey	13%
ATV/snowmobiling	12%
Adventure sports	11%
Snowboarding	6%
Marathon or similar event	5%

Attendance at Live Professional Sporting Events
(Occasional or Regular Participation)

Sport	%
Hockey	25%
Baseball	14%
Football	10%
Soccer	7%
Basketball	7%
Horse racing	4%
Auto racing	4%
Golf	3%
Lacrosse	2%
Figure skating	2%
Tennis	2%
Boxing	1%

YRCEs – General Travel Behaviour

Frequency of Travel

- ■ 0 Trips — 18%
- ■ 1-2 Trips — 23%
- ■ 3-4 Trips — 29%
- ■ 5+ Trips — 30%

Taken in the past 3 years

3.7 Avg. out-of-town vacations taken in the past 3 years

Vacation Destinations

Top Canadian Destinations

Visited in the past 3 years

- Other British Columbia — **20%**
- Vancouver — **14%**
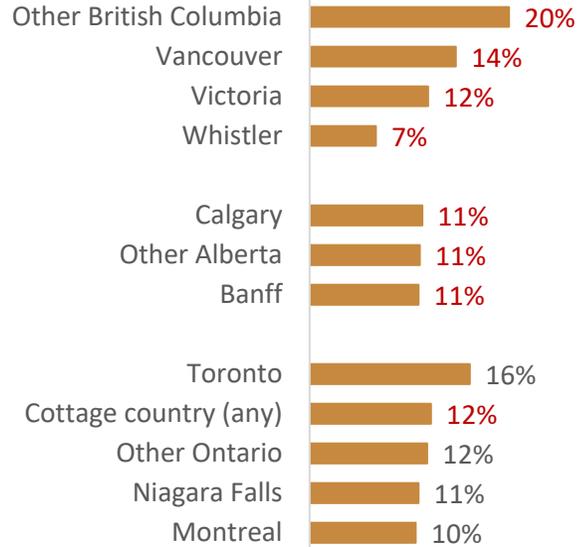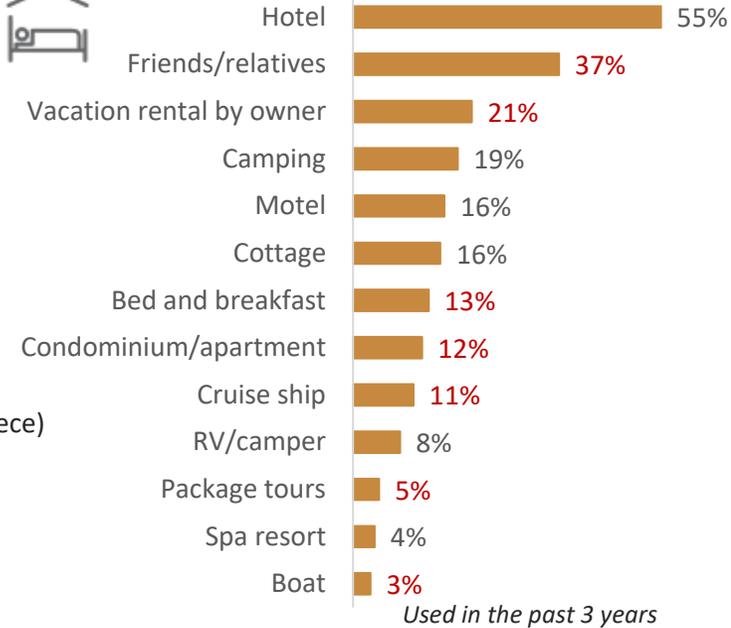- Victoria — **12%**
- Whistler — **7%**
- Calgary — **11%**
- Other Alberta — **11%**
- Banff — **11%**
- Toronto — 16%
- Cottage country (any) — **12%**
- Other Ontario — 12%
- Niagara Falls — 11%
- Montreal — 10%

Top US

- **11%** Florida
- **10%** Other Western US
- **7%** New York City
- **7%** Las Vegas
- **6%** Other Southern US

Top Overseas

- **13%** Mexico
- **11%** Other Europe (Incl. Turkey, Greece)
- **10%** United Kingdom/Republic of Ireland
- **9%** Other Caribbean
- **6%** France

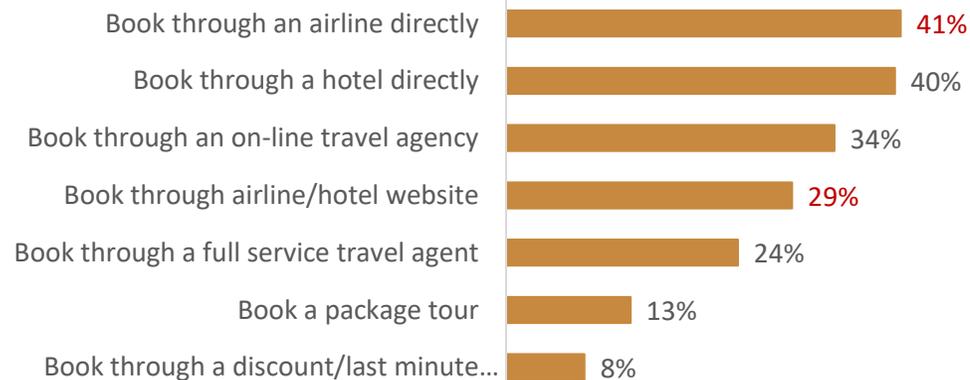## Vacation Accommodations

Used in the past 3 years

- Hotel — 55%
- Friends/relatives — **37%**
- Vacation rental by owner — **21%**
- Camping — 19%
- Motel — 16%
- Cottage — 16%
- Bed and breakfast — **13%**
- Condominium/apartment — **12%**
- Cruise ship — **11%**
- RV/camper — 8%
- Package tours — **5%**
- Spa resort — 4%
- Boat — **3%**

Amount Spent on Last Vacation

- Under $500 — 29%
- $500 - $999 — 17%
- $1,000 - $1,999 — 19%
- $2,000 - $2,999 — 11%
- $3,000 - $3,999 — 7%
- $4,000 or more — **16%**

$ **1,730** Avg. spend on last trip

Vacation Services Bookings

Used in the past 3 years

- Book through an airline directly — **41%**
- Book through a hotel directly — 40%
- Book through an on-line travel agency — 34%
- Book through airline/hotel website — **29%**
- Book through a full service travel agent — 24%
- Book a package tour — 13%
- Book through a discount/last minute… — 8%

Booking Websites Visited

Visited in past year

- Expedia.com/Expedia.ca — 37%
- Airline websites — **32%**
- Booking.com — 21%
- Hotels.com — 18%
- Trivago.ca — 17%
- Other online travel sites — 15%
- Travelocity.com/Travelocity.ca — **13%**
- Sunwing.ca — 10%
- Other discount travel sites — 9%
- Redtag.ca — 6%
- itravel2000.com — 6%

YRCEs – BC/AB Census Divisions (% Penetration)

Year-Round City Escapists
Target Group Penetration: Golden Target Groups

DESTINATION
BRITISH COLUMBIA
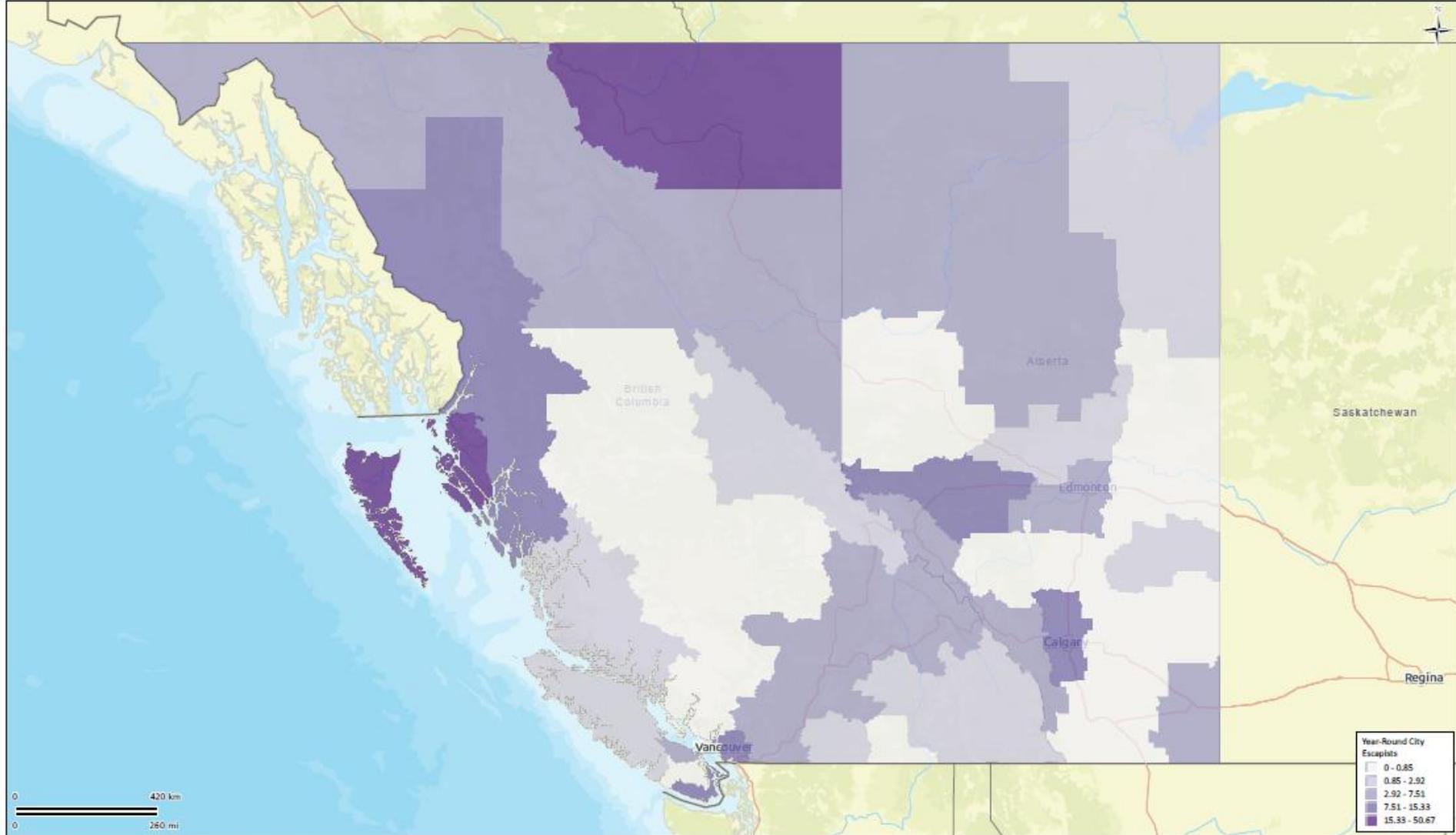
Year-Round City
Escapists
0 - 0.85
0.85 - 2.92
2.92 - 7.51
7.51 - 15.33
15.33 - 50.67

YRCEs – Ontario Census Divisions (% Penetration)

Year-Round City Escapists- Ontario
Target Group Penetration: Golden Target Groups

Area of Interest
Year-Round City Escapists
0 - 0.94
0.94 - 2.54
2.54 - 5.23
5.23 - 8.39
8.39 - 17.9

Year-Round City Escapists (RCE) - Summary

- Year-Round City Escapists segment accounts for 9% of MobileScapes data (travellers) for Golden including accounting for 12% of Winter travellers and 8% of Summer travellers.

- This segment represents only 4% of Canadian households but 27% of NWT households, 17% of Yukon households, 8% of BC households, and 6% of Alberta households.

- More likely to be age 65 and older and be well educated with 40% having a University degree which is notably higher than general population.

- Tend to be wealthy with higher than average household incomes at $170,669. That said, they are more likely to live in an apartment and not have children at home.

- Year-Round City Escapists are moderate traditional media users and are typical online users. Print appears to be a good means of reaching them with 36% having read a daily newspaper and 21% reading a magazine yesterday. They are moderate social media users. In addition to their high use of Facebook and YouTube, are more likely to use LinkedIn, Whatsapp, Twitter, and Podcasts.

- They are more likely to participate in adventure sports.

- They are more likely to be frequent travellers and spend more on their trips. In the past three years, 20% visited BC outside the Vancouver/Victoria/Whistler. Although they mainly stay in hotels, they are more likely to stay in vacation rentals and with friends.

- This segment does not have a high penetration across the country so targeting them will require more micro-levels. We recommend looking for them in Vancouver, Calgary and Edmonton as key markets.

5. Year-Round Suburban Families
(YRSF)

Year-Round Suburban Families (YRSF) - Summary

Market Size (Households)

15,031,844 in Canada

YRSF HHs
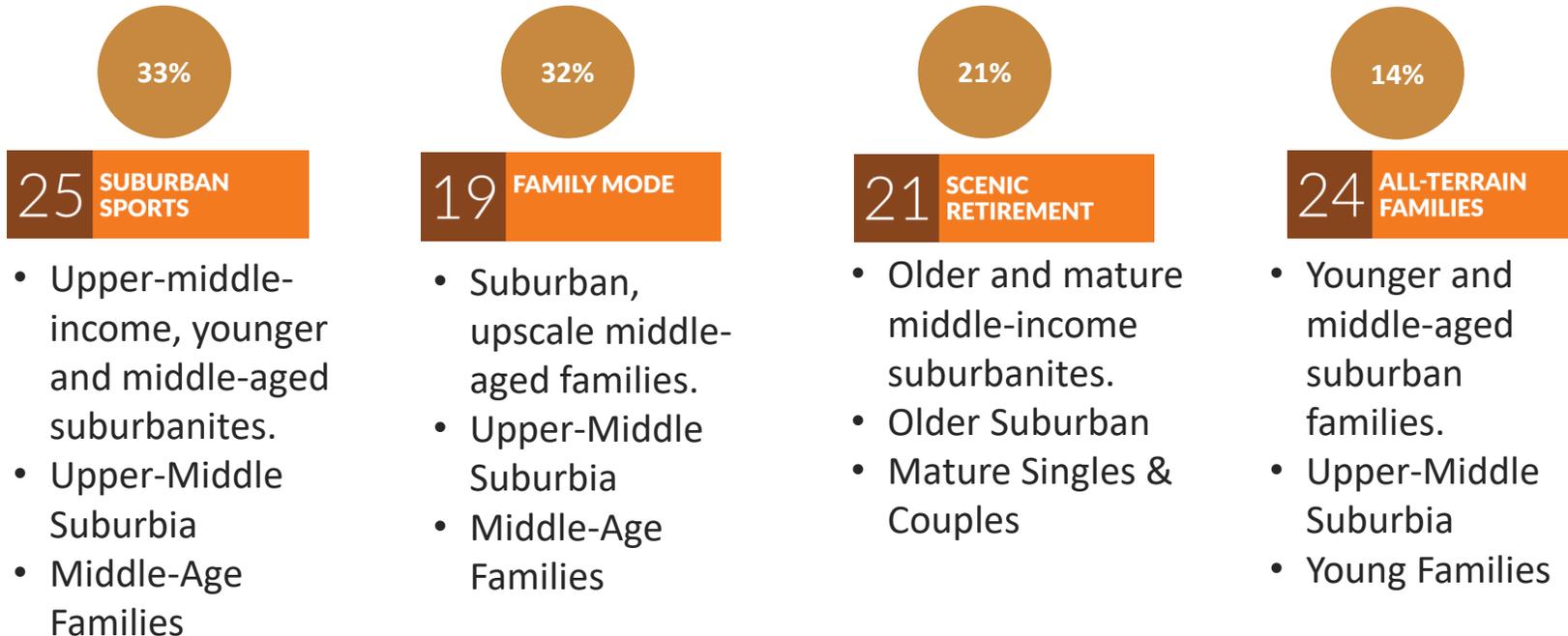
1,052,208 HHs in Canada

7% of market

Snapshot

Younger and middle-aged, upscale middle-income suburban families. Most likely with a technical degree and more likely to have younger children at home.
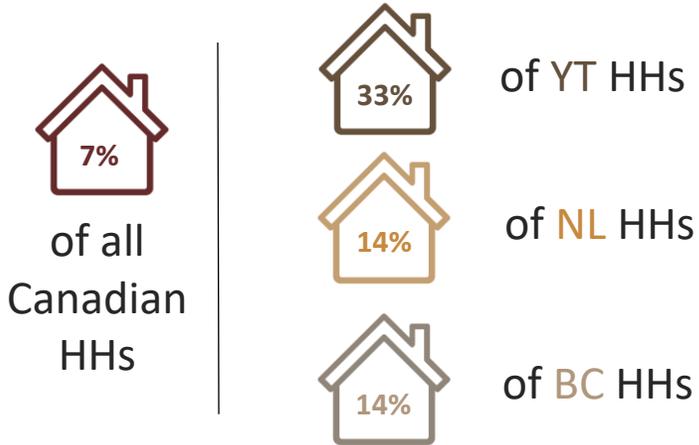
EQ Types

EQ Type	%
Gentle Explorers	33%
No Hassle Travellers	32%
Rejuvenators	21%
Free Spirits	14%

Gentle Explorers are familiarity seekers and reluctant. They demand luxury and comfort when they travel. There's no place like home.

No Hassle Travellers are familiarity seekers and are cautious, dutiful and reserved. They seek secure group travel and want to escape from the duties and obligations of life.

Familiarity Seekers

Rejuvenators are escapists that are family-oriented, travel to escape, love to indulge and be pampered.

Escapists

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.

Enthusiastic Indulgers

PRIZM Lifestyle Groups in the Year-Round Suburban Families Segment

33% — 25 SUBURBAN SPORTS
- Upper-middle-income, younger and middle-aged suburbanites.
- Upper-Middle Suburbia
- Middle-Age Families

32% — 19 FAMILY MODE
- Suburban, upscale middle-aged families.
- Upper-Middle Suburbia
- Middle-Age Families

21% — 21 SCENIC RETIREMENT
- Older and mature middle-income suburbanites.
- Older Suburban
- Mature Singles & Couples

14% — 24 ALL-TERRAIN FAMILIES
- Younger and middle-aged suburban families.
- Upper-Middle Suburbia
- Young Families

YRSFs - Demographics

YRSF HHs

7% of all Canadian HHs

33% of YT HHs

14% of NL HHs

14% of BC HHs

Age

Age	General Population	Year-Round Suburban Families
< 19	21%	25%
20-24	6%	6%
25-34	14%	13%
35-44	13%	14%
45-54	13%	13%
55-64	14%	13%
65-74	11%	10%
75+	8%	7%

YRSF Average Age = 39.9
General Pop. Average Age = 41.5

HH Income ($ CND)

Income	General Population	Year-Round Suburban Families
<$20,000	4%	2%
$20,000 to $39,999	18%	10%
$40,000 to $59,999	14%	11%
$60,000 to $79,999	13%	11%
$80,000 to $99,999	11%	11%
$100,000 to $149,999	19%	24%
$150,000+	21%	30%

YRSF Average HH Income = $127,144
General Pop. Average HH Income = $109,506

YRSF Demographics

12% are visible minorities

13% are immigrants

91% speak English

9% speak English & French

YRSF Education

- University Undergraduate Degree, 21%
- No Certificate, Diploma Or Degree, 14%
- Secondary School Diploma, 30%
- Trade Certificate or College Diploma, 35%

21% YRSF have University Degree
26% General Pop have University Degree
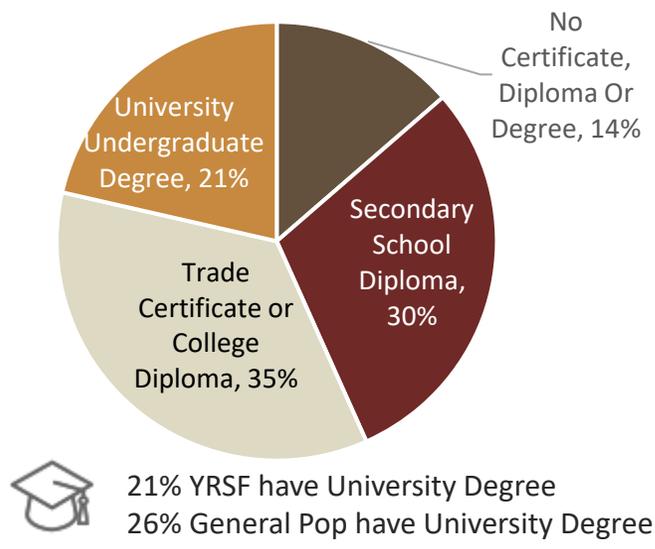
YRSF Family Structure

64% married/common law

46% with children at home
38% are < 10 years old
37% are 10-19
25% are 20+

2.73 average persons in households
85% occupy a detached house
83% own their accommodation

YRSFs – Traditional Media Highlights

Overall Media Use

TV: Moderate

Radio: Moderate

Newspapers: Moderate

Magazines: Light/Moderate

OOH: Light

Print Media – Daily Newspaper

29% read the daily newspaper yesterday
10% read the community newspaper yesterday

Top 5 Newspaper Sections Read:
54% Local & regional news
50% National news
47% International/world
30% Health
30% Movie & entertainment
25% read the Travel section

*YRSFs were more likely to read the **Classified ads** and **Real estate** sections.*

Radio

67% listened to the radio yesterday

Top 5 Radio Program Reach:
24% News/Talk
18% Today's Country
17% Adult Contemporary
17% Classic Hits
15% Mainstream Top 40

*YRSF radio listeners were more likely than the general population to listen to **classic rock, classic country, modern/alternative rock, religious** and **AOR/mainstream rock**.*

Out of Home

Low index scores on noticing out of home advertising, but direct mailers such as community newspaper flyers have high index scores.

Top 5 Places Advertising Noticed:
30% Billboards
20% On Bus Exteriors
19% Digital Billboards
16% On Street Furniture
14% Inside Shopping Malls
Noticed in past week.

*YRSFs were more likely than the general population to notice advertising inside **airports**.*

Print Media – Magazine

17% read a magazine yesterday, more likely to have usage in light and moderate categories.

Top 5 Magazines Read:
9% CAA Magazine
7% Other English-Canadian
7% Other U.S. Magazines
6% Maclean's
6% Canadian Living

*YRSFs were more likely to read **Our Canada, Style at Home, Outdoor Canada, Hello! Canada, People** and **Reader's Digest** magazines, among many other titles.*

TV

Moderate index scores for watching TV

*YRSF TV watchers were more likely than the general population to watch **golf** and **curling** programming, and spend more hours watching speciality and digital networks like **CMT, MSNBC US, Golf Channel, Gusto/CTV Life, Slice, OLN, HGTV** and **History Channel** network, among many others.*

YRSFs – Online Habits

Online Behaviour – General Use

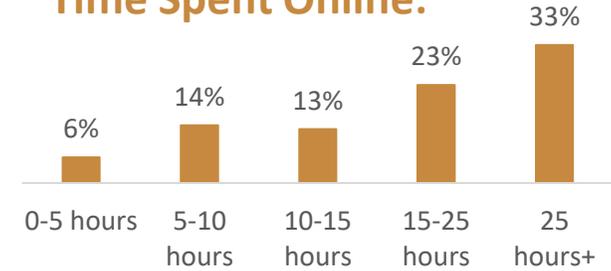**Overall Internet Use:**

29% Light
32% Moderate
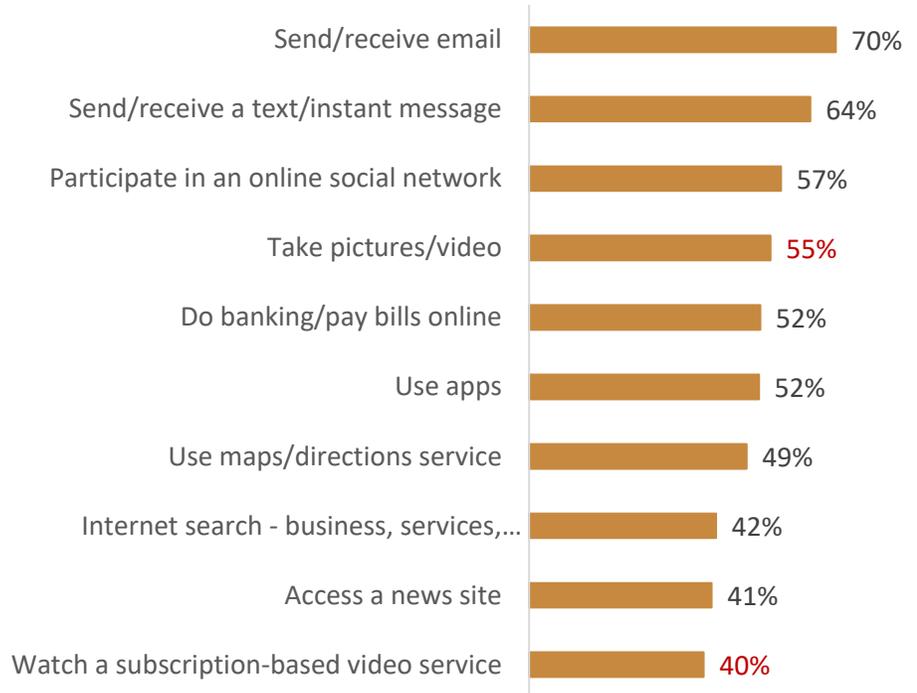**30%** Heavy

Used Internet Yesterday:

84%

Time Spent Online:

6%	14%	13%	23%	33%
0-5 hours	5-10 hours	10-15 hours	15-25 hours	25 hours+

Hours spent on the internet on weekdays

Online Behaviour – Selected Activities

Activity	%
Send/receive email	70%
Send/receive a text/instant message	64%
Participate in an online social network	57%
Take pictures/video	55%
Do banking/pay bills online	52%
Use apps	52%
Use maps/directions service	49%
Internet search - business, services,…	42%
Access a news site	41%
Watch a subscription-based video service	40%

Activities in past week.

Mobile Behaviour – Selected Activities

Activity	%
Send/receive a text/instant message	60%
Take pictures/video	52%
Send/receive email	52%
Use apps	48%
Participate in an online social network	45%
Use maps/directions service	41%
Do banking/pay bills online	29%
Access a news site	29%
Internet search - business, services,…	29%
Watch free streaming music videos	22%

Activities in past week.

YRSFs – Social Media

Overall Social Media Use

Light

59% participate in online social media networks
21% have more than 300 friends

Social Media Currently Use

Facebook 79% **YouTube** 69% **Instagram** 37%

LinkedIn 37% **WhatsApp** 34% **Pinterest** 32%

Twitter 27% **Snapchat** 13% **TikTok** 6%

Overall, YRSFs are light social media users with Facebook being their primary social media platform. They are more likely than the general population to use Pinterest. When they did use social media they were passive users who read news feeds, tweets, status updates and viewed friend's photos, but rarely posted themselves. They tend to listen to radio or stream music online about every day.

Reasons to <u>follow</u> brands through Social Media

17% follow more than 5 brands

30% - To learn about a brand's products /services
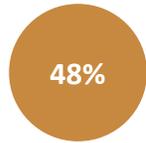**28%** - To get coupons and discounts
27% - To enter contests
11% - To be among the first to hear brand news
11% - To provide feedback to the brand about their products or services
8% - To engage with content

Reasons to <u>disengage</u> with brands through Social Media

48% have disengaged from a brand

35% - Too many messages
19% - Not enough value
14% - I stopped purchasing products from this brand

Social Media Actions

36% - Like brand on Facebook
17% - Subscribe to brand email newsletter
14% - Follow brand on Instagram
11% - Subscribe to brand channel on YouTube
9% - Join an online community of consumers who also like the brand
8% - Follow brand on Twitter

YRSFs – Activities and Attractions
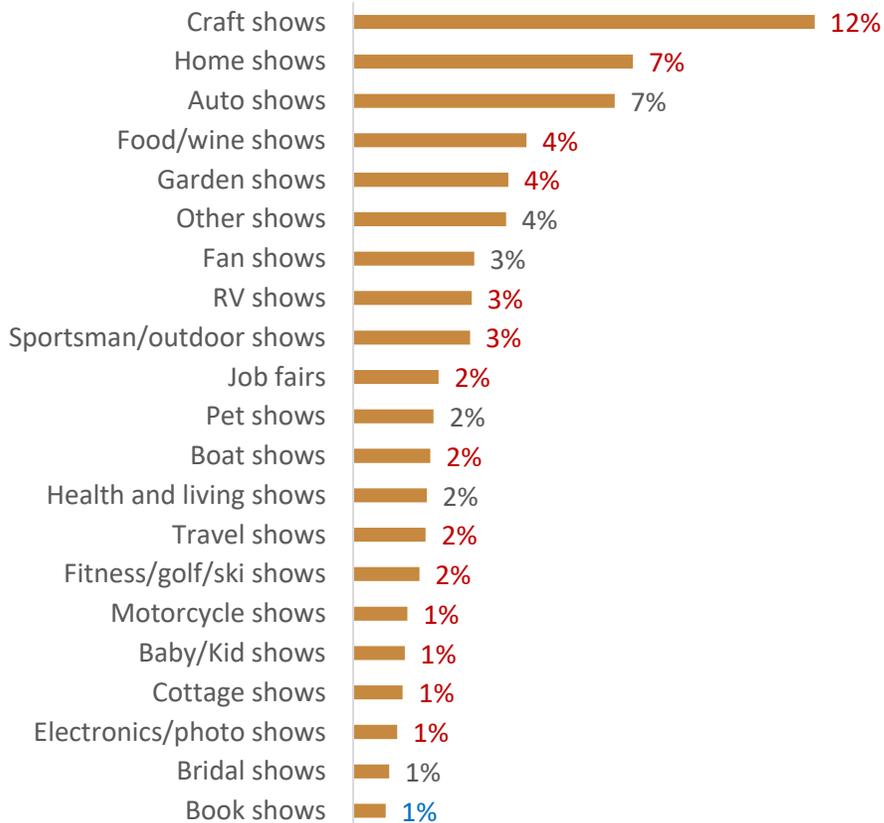
Club Membership
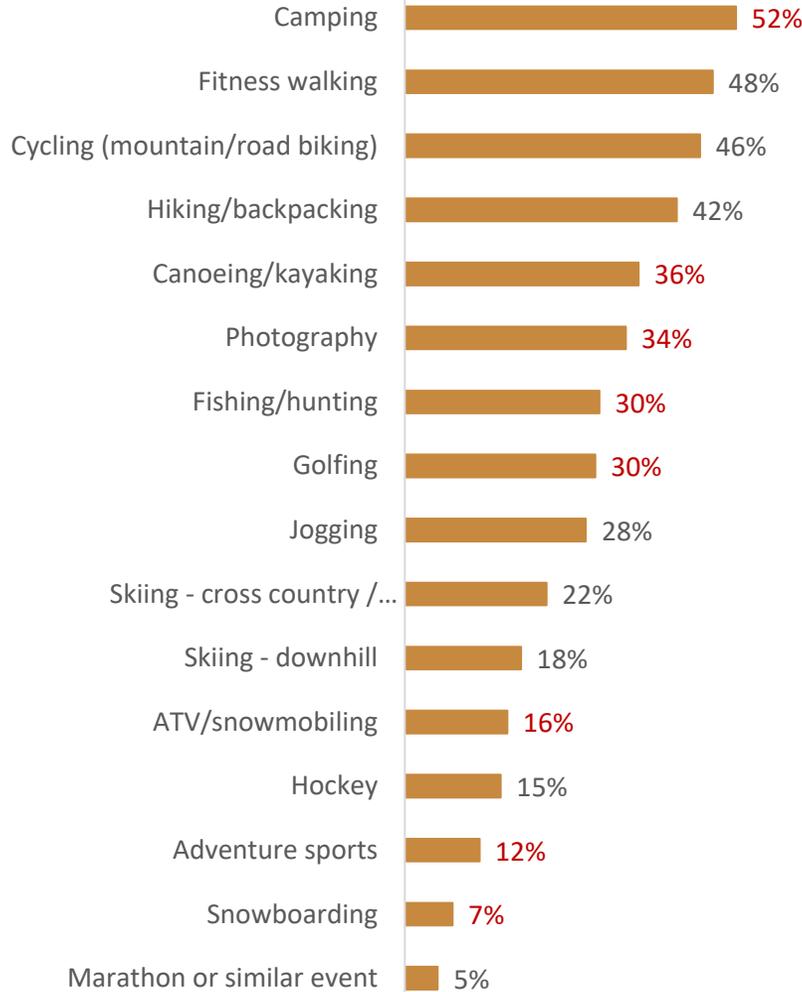
Moderate index scores for club membership

20% were a member of a fitness club
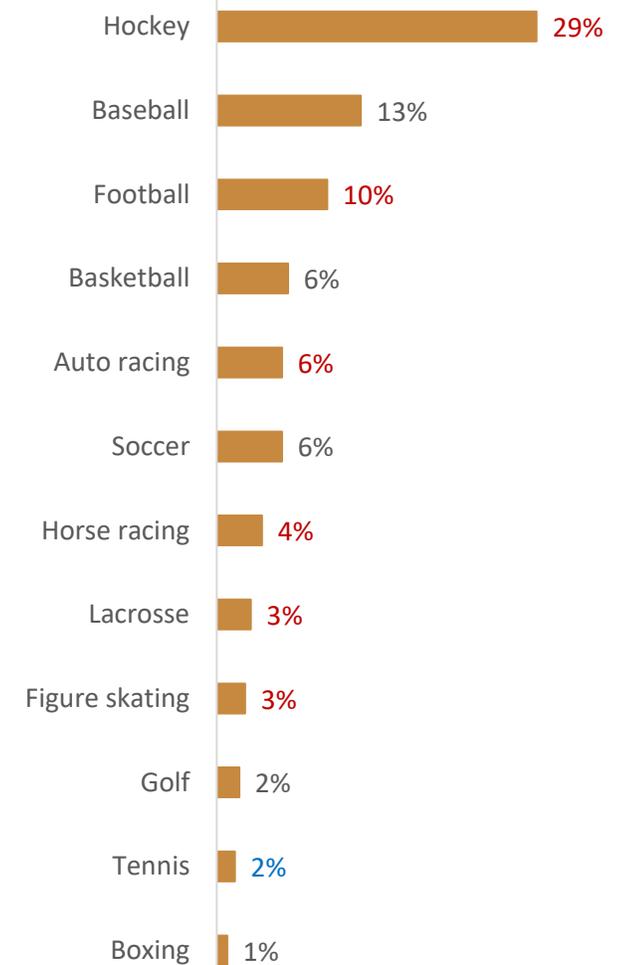**3%** were a member of a golf club

Consumer Shows Attended in Past Year

Show	%
Craft shows	12%
Home shows	7%
Auto shows	7%
Food/wine shows	4%
Garden shows	4%
Other shows	4%
Fan shows	3%
RV shows	3%
Sportsman/outdoor shows	3%
Job fairs	2%
Pet shows	2%
Boat shows	2%
Health and living shows	2%
Travel shows	2%
Fitness/golf/ski shows	2%
Motorcycle shows	1%
Baby/Kid shows	1%
Cottage shows	1%
Electronics/photo shows	1%
Bridal shows	1%
Book shows	1%

Selected Outdoor Activity Participation
(Occasional or Regular Participation)

Activity	%
Camping	52%
Fitness walking	48%
Cycling (mountain/road biking)	46%
Hiking/backpacking	42%
Canoeing/kayaking	36%
Photography	34%
Fishing/hunting	30%
Golfing	30%
Jogging	28%
Skiing - cross country /…	22%
Skiing - downhill	18%
ATV/snowmobiling	16%
Hockey	15%
Adventure sports	12%
Snowboarding	7%
Marathon or similar event	5%

Attendance at Live Professional Sporting Events
(Occasional or Regular Participation)

Sport	%
Hockey	29%
Baseball	13%
Football	10%
Basketball	6%
Auto racing	6%
Soccer	6%
Horse racing	4%
Lacrosse	3%
Figure skating	3%
Golf	2%
Tennis	2%
Boxing	1%

YRSFs – General Travel Behaviour

Frequency of Travel

Pie chart:
- 18% — 0 Trips
- 25% — 1-2 Trips
- 28% — 3-4 Trips
- 30% — 5+ Trips

3.6
Avg. out-of-town vacations taken in the past 3 years

Taken in the past 3 years

Vacation Destinations

Top Canadian Destinations

- Other British Columbia — 21%
- Vancouver — 15%
- Victoria — 11%
- Whistler — 6%

- Calgary — 14%
- Other Alberta — 14%
- Banff — 12%

- Toronto — 15%
- Cottage country (any) — 12%
- Niagara Falls — 12%
- Other Ontario — 11%
- Ottawa — 8%

Visited in the past 3 years

Top US
- **12%** Florida
- **10%** Other Western US
- **8%** Las Vegas
- **7%** Other Southern US
- **6%** New York City

Top Overseas
- **14%** Mexico
- **9%** Other Europe (Incl. Turkey, Greece)
- **9%** Other Caribbean
- **7%** United Kingdom/Republic of Ireland
- **5%** Cuba

Vacation Accommodations

- Hotel — 55%
- Friends/relatives — 37%
- Camping — 22%
- Vacation rental by owner — 21%
- Motel — 17%
- Cottage — 14%
- RV/camper — 13%
- Bed and breakfast — 12%
- Condominium/apartment — 10%
- Cruise ship — 9%
- Spa resort — 4%
- Package tours — 4%
- Boat — 3%
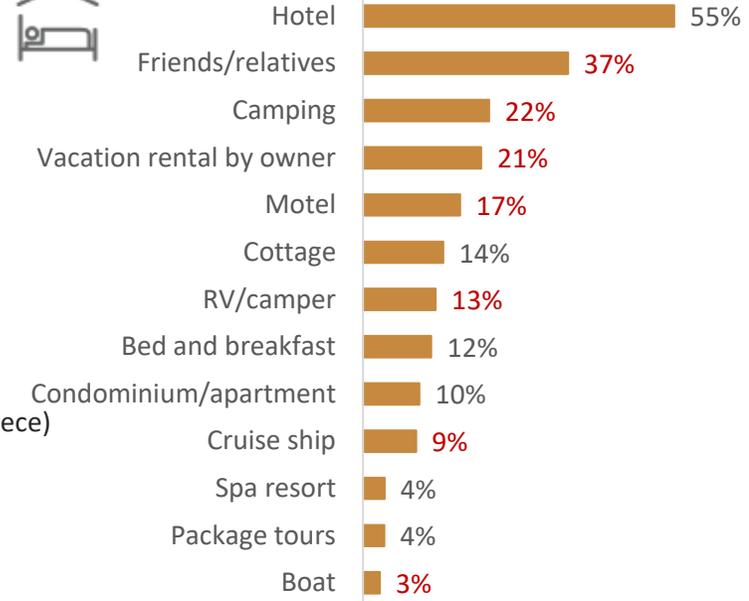
Used in the past 3 years

Amount Spent on Last Vacation

- Under $500 — 30%
- $500 - $999 — 19%
- $1,000 - $1,999 — 18%
- $2,000 - $2,999 — 11%
- $3,000 - $3,999 — 7%
- $4,000 or more — 15%

$1,679
Avg. spend on last trip

Vacation Services Bookings

- Book through a hotel directly — 41%
- Book through an airline directly — 38%
- Book through an on-line travel agency — 33%
- Book through airline/hotel website — 28%
- Book through a full service travel agent — 22%
- Book a package tour — 10%
- Book through a discount/last minute… — 9%

Used in the past 3 years

Booking Websites Visited

- Expedia.com/Expedia.ca — 39%
- Airline websites — 29%
- Booking.com — 20%
- Hotels.com — 19%
- Trivago.ca — 17%
- Other online travel sites — 14%
- Travelocity.com/Travelocity.ca — 13%
- Sunwing.ca — 11%
- Other discount travel sites — 9%
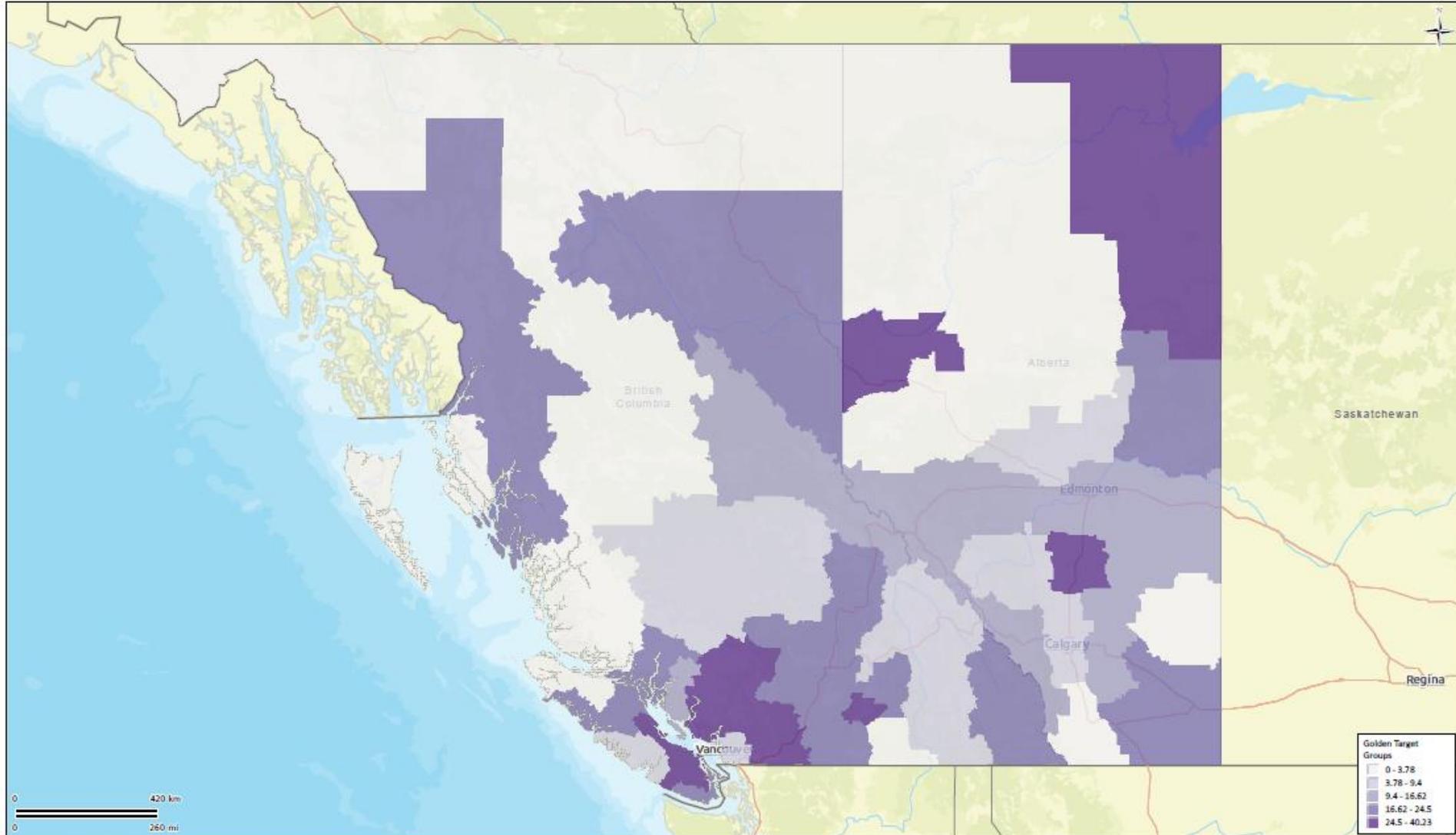- Redtag.ca — 7%
- itravel2000.com — 7%
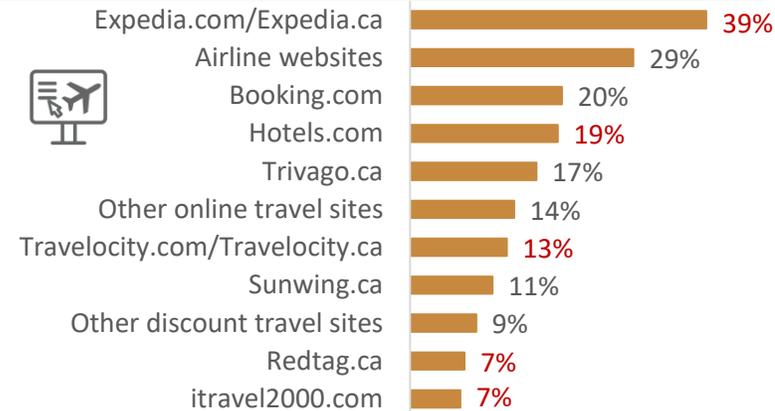
Visited in past year

YRSFs – BC/AB Census Divisions (% Penetration)

Year-Round Suburban Families
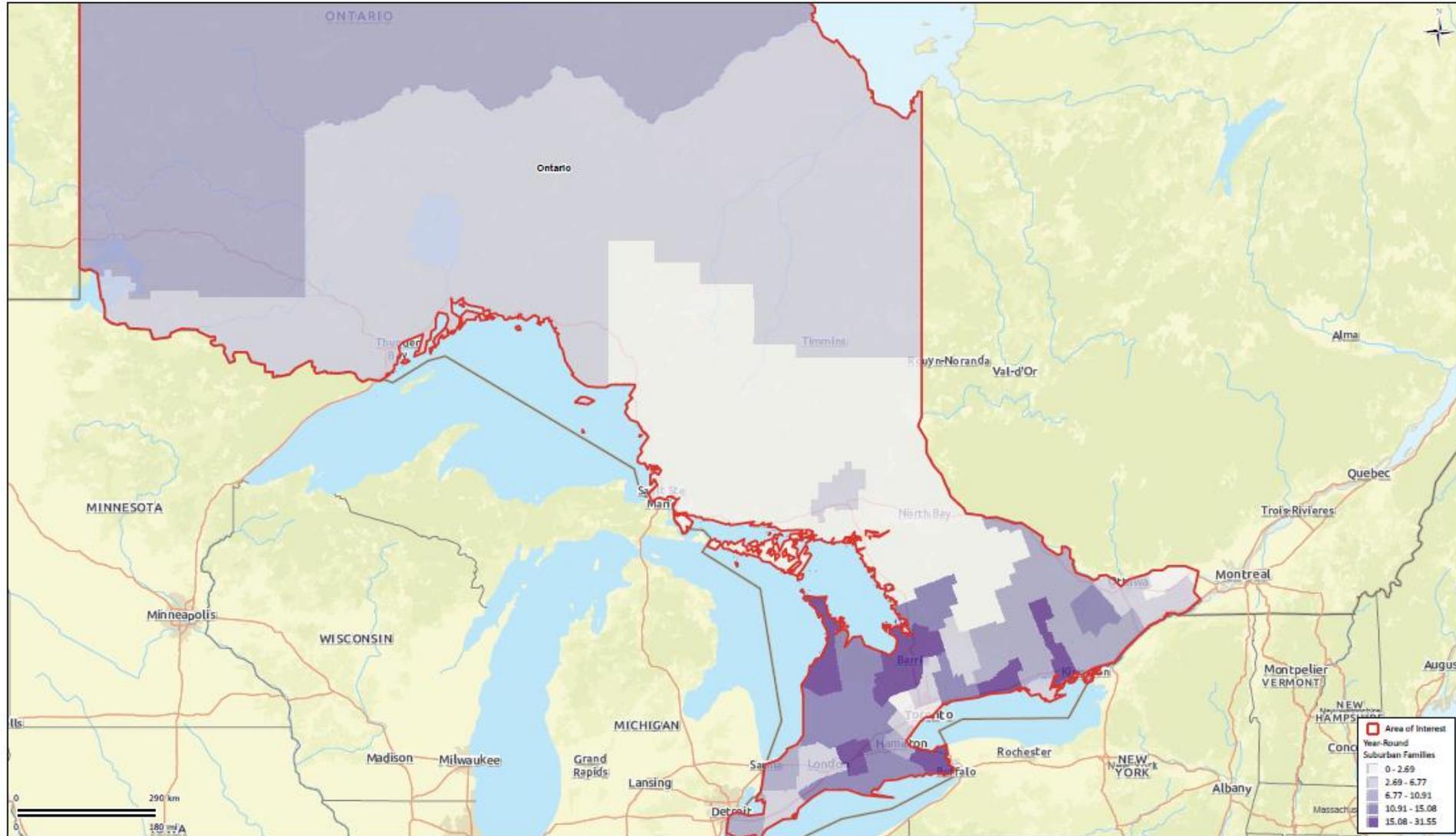Target Group Penetration: Golden Target Groups

YRSFs – Ontario Census Divisions (% Penetration)

Year-Round Suburban Families- Ontario
Target Group Penetration: Golden Target Groups

Year-Round Suburban Families (YRSF) - Summary

- Year-Round Suburban Families segment accounts for 12% of MobileScapes data (travellers) for Golden. This is consistent between seasons as this segment accounted for 12% of Winter and 13% of Summer travellers.

- This segment represents 8% of Canadian households with the highest penetration in Alberta (14%), British Columbia (13%), Saskatchewan (9%), and Newfoundland & Labrador (14%).

- They are less likely to be minorities and immigrants. They have average education levels but are more likely to be married and have a higher than average number of people in household at 2.73 being more likely to have kids under 10 in the household. They are more likely to own their detached home.

- Year-Round Suburban Families are moderate traditional media users. They are also average online users and light social media users. Despite being light users, they have standard use of most social media platforms (i.e. Facebook, Instagram, Twitter) and are more likely to use Pinterest.

- They are notably more likely to participate in many outdoor activities including Camping, Canoeing/ Kayaking, Fishing/Hunting, Golf, ATV/Snowmobiling, Adventure Sports, and Snowboarding.

- They are more likely to be frequent travellers and are more likely to visit BC in the past three year. Specially, 21% visited BC outside the Vancouver/Victoria/Whistler over the past three years. Although they mainly stay in hotels, they are more likely to stay at a variety of accommodation types.

- They are likely to be found in suburban locations, particularly the Fraser Valley, Nanaimo/Duncan, Red Deer, Barrie, Niagara Falls, Peterborough, and Kingston.