

PRIZM Segments Included (by SESI): 03, 08, 10, 15, 18, 24, 30, 31, 57, 61, 64

Market: Alberta

Overview

- Of the 9 EQ Target Groups identified in Canada, Free Spirits rank 1st, making up 322,609 households, or 19.6% of the total Households in Alberta (1,644,476)
- The Median Household Maintainer Age is 46, 53% of couples have children living at home
- Average Household Income of \$122,710 compared to Alberta at \$125,945
- Top Social Value: Need for Escape The desire to regularly escape the stress and responsibilities of everyday life
- Above Average interest in Sporting Events

Sources: DemoStats 2020, PRIZM 2020

- Above Average interest in travelling within Canada (Banff), Free Spirits from Alberta spent an average of \$1,545 on their last vacation
- On average, Free Spirits from Alberta spend 12hrs/week listening to the Radio, 20hrs/week watching TV, 1hr/week reading the Newspaper and 4hrs/day on the Internet. Daily Magazine usage is minimal (6 min/day)
- 79% currently use Facebook, 42% use Instagram and 33% use Twitter

Market Sizing

Total Population

Target Group: 977,515 | 21.9% Market: 4,472,482

Total Households

Target Group: 322,609 | 19.6% Market: 1,644,476

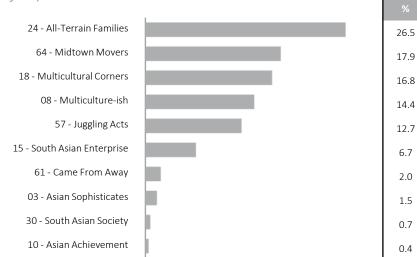
Source: Environics Analytics 2020

Top Geographic Markets

		Target Group		Market	
Census Subdivision	% of Group	% of Market	Index	HH Count	% of Market
Calgary, AB (CY)	37.7	24.1	123	504,320	30.7
Edmonton, AB (CY)	26.2	21.6	110	392,545	23.9
Airdrie, AB (CY)	3.8	47.8	243	25,833	1.6
Grande Prairie, AB (CY)	3.4	43.0	219	25,600	1.6
Red Deer, AB (CY)	2.9	22.1	113	42,867	2.6
Wood Buffalo, AB (SM)	2.8	32.9	168	27,216	1.7
Lethbridge, AB (CY)	2.3	18.2	93	40,477	2.5
Spruce Grove, AB (CY)	2.2	46.3	236	15,517	0.9
Leduc, AB (CY)	1.8	46.0	234	12,590	0.8
Fort Saskatchewan, AB (CY)	1.7	51.5	263	10,713	0.7

Top PRIZM Segments

% of Target Group Households



Target Group



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Demographic Profile



Target Group: 977,515 | 21.9% Market: 4,472,482

Total Households

Target Group: 322,609 | 19.6% Market: 1,644,476

Average Household Income

\$122,710 (97)

Median Household Maintainer Age

> 46 (94)

2 Persons 3 Persons 5+ Persons 1 Person 4 Persons

18.7

117

Household Size*

Marital Status**

60.3% (101)

18.6

77

53.4% (115)

29.8

87

19.3

126

Education**

28.5% (102)

13.6

131

Married/Common-Law

Couples With Kids at Home

Non-Official Language*

Family Composition***

High School Certificate Or Equivalent

Visible Minority Presence*

42.1% (148)

Belong to a visible minority group

2.3% (158)

No knowledge of English or French

30.4% (133)

Born outside Canada

Immigrant Population*

Psychographics**

Strong Values	weak values
I	

Personal Optimism	122 73		Attraction to Nature
Need for Escape	120	80	Fulfilment Through Work
Status via Home	117	85	Brand Apathy
Work Ethic	116	86	Ecological Concern
Culture Sampling	116	87	Importance of Spontaneity

Key Social Values

Need for Escape Index = 120

Work Ethic Index = **116** Culture Sampling Index = **116**

Legacy

Index = 114

Pursuit of Originality Index = **112**

Attraction For Crowds Index = **110**

Ecological Fatalism Index = 109

Social Intimacy Index = 109

Multiculturalism Index = 109

Traditional Family Index = 108

National Pride Index = 108

Confidence in Advertising Index = 108



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Sports & Leisure

Occasionally/Regularly Participate or Attended/Visited [Past Year]

Top 5 Activities Participated*	% Comp	Index
Reading	80.4	99
Camping	58.8	100
Gardening	58.0	98
Home exercise & home workout	57.5	104
Volunteer work	52.1	102

Top 5 Activities Attended*	% Comp	Index
Other activities & attractions	51.9	112
Auditoriums, arenas & stadiums (any)	48.7	103
Sporting events	45.4	110
Parks & city gardens	41.0	104
Movies at a theatre/drive-in	39.6	105

Kev	Tour	ism ⊬	CUIV	rries :

Camping	Swimming	Cycling	Sporting events	Hiking & backpacking	Parks & city gardens	National or provincial park	Bars & restaurant bars
<u>Å</u>	\$			Ś	*	T P	
58.8%	51.9%	48.1%	45.4%	43.3%	41.0%	39.4%	38.9%
(100)	(101)	(106)	(110)	(106)	(104)	(97)	(105)
Ice skating	Zoos & aquariums	Golfing	Photography	Specialty movie theatres/IMAX	Canoeing & kayaking	Fishing & hunting	Historical sites
	ET3						
32.1%	32.0%	30.1%	29.4%	27.3%	26.0%	25.6%	24.4%
(106)	(102)	(96)	(95)	(108)	(96)	(90)	(98)
Theme parks, waterparks & water slides	Pilates & yoga	Downhill skiing	Cross country skiing & snowshoeing	ATV & snowmobiling	Hockey	Video arcades & indoor amusement centres	Power boating & jet skiing
	Ĵ	₹°	±3i	500	Ą		
24.0%	21.9%	21.2%	19.7%	15.5%	15.0%	14.3%	13.3%
(113)	(97)	(106)	(93)	(89)	(95)	(108)	(98)
Adventure sports	Curling	Dinner theatres	Snowboarding	Inline skating	Music festivals	Beer, food & wine festivals	Marathon or similar event
	M.		<u> </u>		((()))		¥.
12.6%	11.5%	11.3%	9.9%	9.7%	8.3%	7.5%	4.9%
(101)	(94)	(90)	(121)	(122)	(101)	(95)	(114)
Sources: Opticks Powered by Numer	is 2020 I	index: At least 10% above or	Source: Environia	s Analytics 2020	(!) Indicates small sample size	*Selected and rani	ked by percent composition



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113

107

98

105

98

105

100

91

97

84

Travel Profile

Top Canadian Destinations*



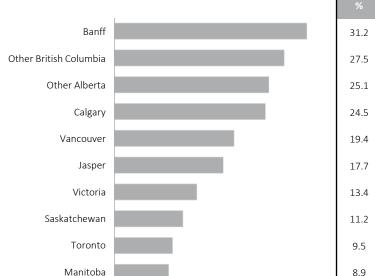
Vacation Spending

Under \$500

28.9

97

Spent Last Vacation



Vacation Booking**

Used [Past 3 Years]



%	Index
41.0	101
37.6	102
35.4	107
31.3	107
17.9	98
15.9	95
10.0	99
7.4	101

Booked With [Past Year]



Booking.com

Hotels.com Hotels.com

trivago Trivago.ca

** travelocity Travelocity.com/ca

15.1% (110)()red tag.ca

4.3% (100)

4.0% (107)

1.7%

(117)

1.9% (111)

0.8% (93)

Redtag.ca/itravel.com (!) 0.6% (81)

Airline Websites 15.5%

Discount Sites

Other Travel

(107)

3.9%

Travel Type & Frequency

Business Trips



11.1 (102)

Average number of nights away in the past year for business trips

Personal Trips

3.7 (102)

Average out-of-town vacations taken in the past 3 years

Average number of business trips by mode of transportation in the past year:





3.7

(110)



4.3



Sources: Opticks Powered by Numeris 2020 Index: At least 10% above or

\$1,000 to

\$1,999

22.6

106

\$2,000 to

\$2,999

11.1

97

\$500 to

\$999

20.0

96

Note: Base variables are default and vary based on database

below the average

\$3,000 to

\$3,999

6.8

114

Target Group

\$4,000 or

More

10.7

99

Source: Environics Analytics 2020

(102)

Average spend

on last trip

(!) Indicates small sample size

*Selected and ranked by percent composition **Ranked by percent composition

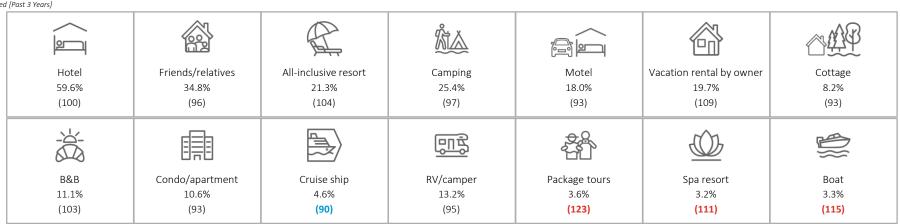


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Travel Profile

Accommodation Preferences*

Used [Past 3 Years]



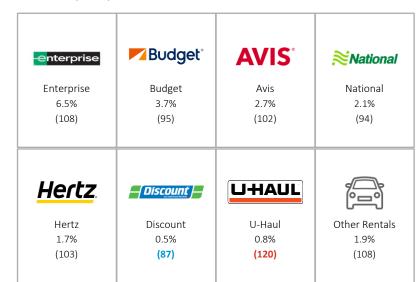
Airline Preferences**

Flown [Past Year]



Car Rental*

Rented From [Past Year]





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Media

Overall Level of Use

Radio

12 hours/week (96)

1,188 minutes/week (99)

Reality shows

Television

Newspaper

20.8 105

101

104

104

106

106

105

103

104

110

103

1 hours/week (85)

6 minutes/day

(73)

Magazine

Internet ((()))

239 minutes/day (103)

Top Radio Programs* Programs [Weekly]

	%	Inde
1ainstream Top 40/CHR	24.6	126
ews/Talk	22.2	86
dult Contemporary	18.7	117

Mainstream Top 40/CHR	24.6	126
News/Talk	22.2	86
Adult Contemporary	18.7	117
Classic Hits	16.9	97
Today's Country	15.2	94
AOR/Mainstream Rock	11.3	112
Hot Adult Contemporary	9.6	122
Multi/Variety/Specialty	9.3	81
Modern/Alternative Rock	9.2	130

Top Television Programs* Programs [Average Week]

	%	Index
Movies	53.1	103
Evening local news	33.9	97
Primetime serial dramas	29.6	103
Hockey (when in season)	29.1	96
Home renovation/decoration shows	24.6	98
Situation comedies	23.9	100
Suspense/crime dramas	23.4	97
News/current affairs	22.5	90
Documentaries	21.5	93

Top Newspaper Sections* Frequency Read [Occasionally/Frequently]

	%	Index
Local & Regional News	51.7	97
National News	46.6	94
International News & World	42.1	93
Movie & Entertainment	31.3	96
Sports	26.7	94
Health	24.9	93
Food	24.2	93
Editorials	24.0	87
Business & Financial	21.3	90
Travel	18.9	88

Top Magazine Publications*

Read [Past Month]

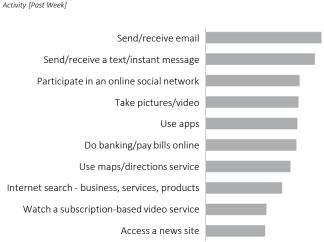
Hello! Canada

Cineplex Magazine

	%	Inde
Other U.S. magazines	6.9	93
Other English-Canadian	5.9	85
CAA Magazine	4.7	85
Maclean's	4.2	99
Canadian Living	4.0	81
People	3.9	104
National Geographic	3.7	88
Reader's Digest	3.4	69

Top Internet Activities*

Classic Rock

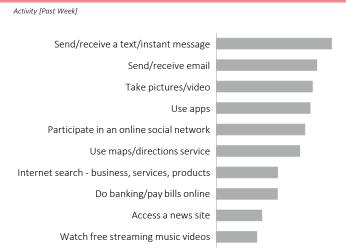


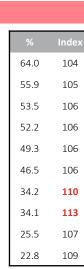
7.3

106

Top Mobile Activities*







94

101

3.4

3.1

69.6

65.7

56.5

55.8

55.2

54.6

51.0

46.0

36.6

35.8

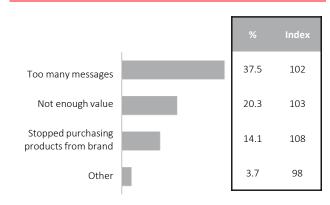


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Media

Social Media Platforms Reasons to Follow Brands Usage [Currently Use] Facebook YouTube LinkedIn in 78.8% 72.0% 49.2% (100)(103)(108)To get coupons and 36.0 110 discounts Instagram WhatsApp Twitter 41.9% 41.9% 32.5% To learn about a brand's 34.1 107 (109)(114)(113)products /services Pinterest Podcasts Snapchat 32.5 106 To enter contests 31.6% 19.6% 17.3% (98)(110) (113)To be among the first to 14.5 118 hear brand news Reddit Blogs Health/Fitness 97 13.3% 11.0% 9.6% To provide feedback to 12.1 106 (128)(114)(109)the brand Dating App Flickr Tinder To engage with content 8.9 112 4.9% 3.3% 2.9% To make suggestions for (112)(117)(131)new products/services 6.0 112 To share brand-related stories with consumers 5.9 105 **Social Media Attitudes** "I tend to ignore marketing and "Use SM to keep up to date on general "I am well informed about SM" advertisements when I'm in a social news/events" media environment" 37% | Index = **111** 40% | Index = 103 70% | Index = 97

Reasons to Unfollow Brands



Actions Taken using Social Media

Variables with Response "Yes"



"Use SM to keep up to date on news/events in my industry" 31% | Index = 109

"Feel comfortable collaborating with others through SM" 31% | Index = 109

"I am open to receiving relevant marketing messages through social media channels" 23% | Index = 106

Source: Environics Analytics 2020



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Market: Alberta

Product Preferences

Variables with "Aaree" Statements

"I would like	to eat healthy foods
mo	ore often"
75%	Index = 101

"I have tried a product/service based on a personal recommendation" 71% | Index = 99

"I generally achieve what I set out to do" 69% | Index = 98 "Family life and having children are most important to me" 62% | Index = 101 "I am very concerned about the nutritional content of food products I buy" 62% | Index = 100

"I value companies who give back to the community" 60% | Index = 98

"I like to cook" 58% | Index = 103 "I offer recommendations of products/services to other people" 57% | Index = 100 "I consider myself to be informed on current events or issues" 54% | Index = 94 "I am interested in learning about different cultures" 54% | Index = 96

"I like to try new places to eat" 54% | Index = 101

"I make an effort to buy local produce/products" 50% | Index = 95 "I like to try new and different products" 49% | Index = 107 "It's important to buy products from socially-responsible/environmentallyfriendly companies" 48% | Index = 100

"When I shop online I prefer to support Canadian retailers" 47% | Index = 99

"Free-trial/product samples can influence my purchase decisions" 42% | Index = 99

"I am adventurous/"outdoorsy"" 41% | Index = 102 "I prefer to shop online for convenience" 31% | Index = 102 "Staying connected via social media is very important to me" 30% | Index = 99

"Vegetarianism is a healthy option" 27% | Index = 105

"I am willing to pay more for ecofriendly products"

26% | Index = 103

"Advertising is an important source of information to me"

26% | Index = 96

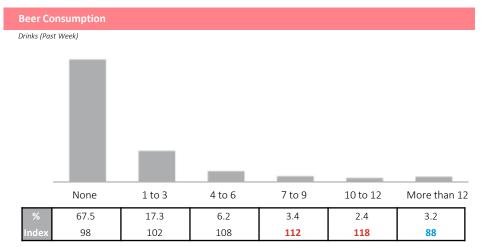
"I consider myself to be sophisticated" 26% | Index = 106

"I lead a fairly busy social life" 24% | Index = 94 "I enjoy being extravagant/indulgent" 21% | Index = 109



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Product Preferences



Drinks

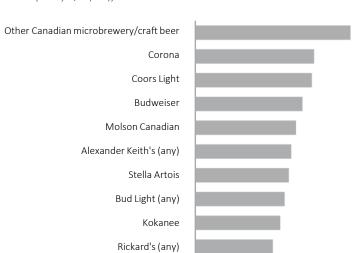
Drank [Past Month]	% Comp	Index
Canadian wine	11.8	95
Liqueurs (any)	6.9	102
Cider	6.7	109

Type Drank [Past Month]	% Comp	Index
Microbrewery/craft beer	12.7	109

rand of Drink [Most Often/Frequent] % Com		Index
Other Canadian microbrewery/craft beer	19.8	98

Top 10 Beers*

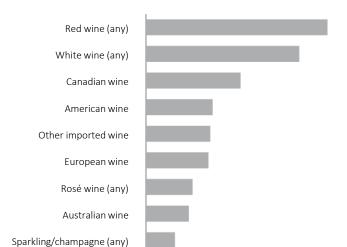
Brand Drink [Most Often/Frequently]

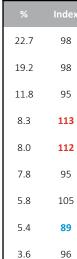


%	Index
19.8	98
15.2	98
14.9	95
13.7	99
12.9	99
12.3	96
11.9	108
11.4	93
10.9	96
9.9	105

Wine Details

Drank [Past Month]







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Product Preferences

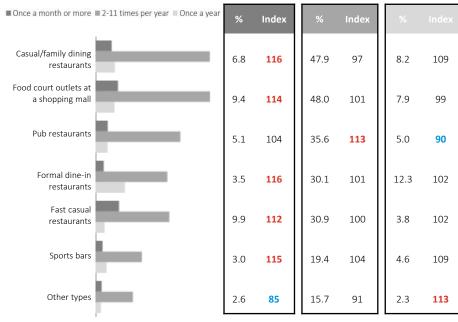
Restaurant Type Visited*

Frequency of Visiting [Past Year]



Restaurant Service Type*

Frequency of Visiting [Past Year]



Purchased Organic Food

Done [Past Week]





Organic Meat 7.7% (119)



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Product Preferences

Demographics



Rent 27.8%

(102)

72.2% (100)

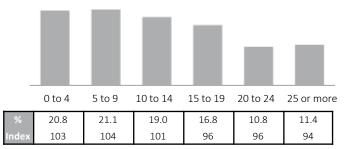
Own

Age of Children at Home



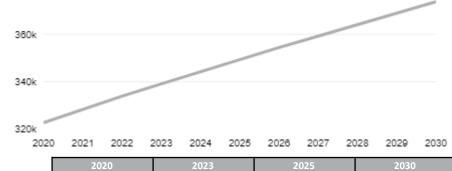
Children at Home 51.8%

(122)



Demographic Trends

Household Projections

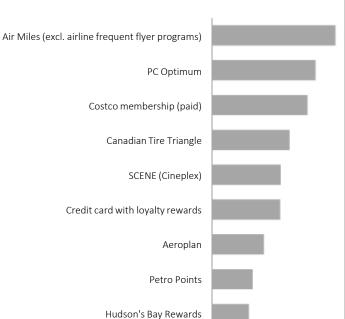


	2020	2023	2025	2030
Count	322,609	339,014	349,467	373,835
% Change	-	5.1	8.3	15.9
Index	-	102	102	99

Note: Index compares % change from 2020 target group households to % change from 2020 market households

Loyalty Programs*

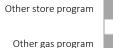
Member

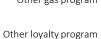


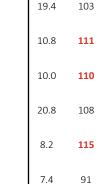


Esso Extra Program









104

103

107

100

115

105

107

111

64.4

54.0

49.9

40.5

35.9

35.7

27.2

21.4

10.0

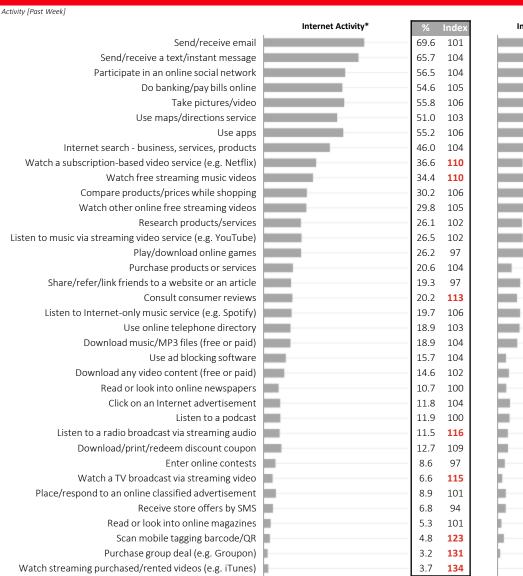
101

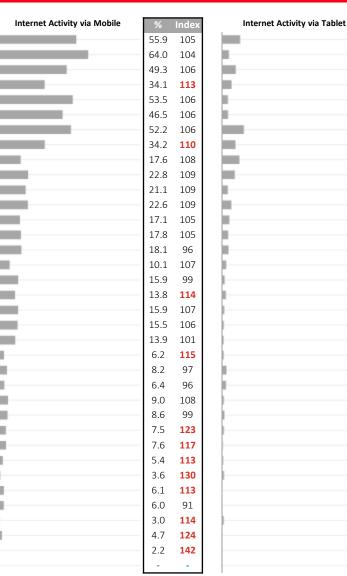


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Internet Activity





Inde

98

92

104

108

109

98

111

94

118

123

106

117

106

109

89

107

80

117

121

104

107

106

129

101

95

148

112

102

99

126

85

106

12.8

5.1

9.8

6.9

4.4

4.5

15.4

9.6

12.3

9.1

4.4

6.7

5.4

4.6

4.8

3.2

2.2

3.0

1.9

1.6

1.4

1.5

3.4

3.1

1.6

2.0

1.6

0.9

1.1

1.7

0.7



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95

104

100

84

91

132

88

92

91

98

119

120

135

6.3

2.9

2.2

1.4

3.1

1.4

0.8

1.5

1.4

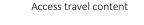
1.0

Internet Activity

Top Website Types*







Access real estate listings/sites



Access home decor-related content

Access a TV station's website

Access celebrity gossip content

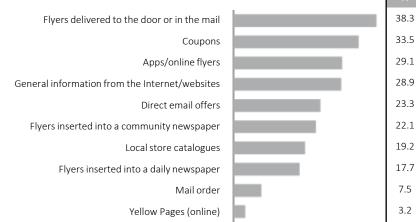
Access fashion or beautyrelated content

Access automotive news/content

Target Group

Direct Media Usage



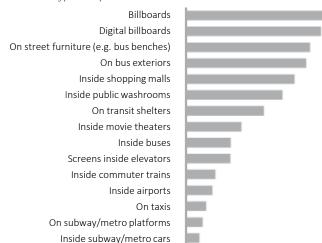


Yellow Pages (print)

22.1 19.2 17.7 7.5 3.2

Out of Home Advertising

Noticed Advertising [Past Week]



3.1

2.5

96

101

97

100

98

90

94

100

96

93

84

100

102

110

113

102

108

116

110

103

127

120

98

117

125

113

2.9

Index

103

97

101

110

109

106

101

110

90

104

101

105

100

35.8

26.1

13.7

13.1

10.7

8.9

11.8

6.6

7.9

7.3

4.3

25.5

16.9

9.3

10.6

10.9

3.9

6.3

3.9

3.9

5.2

3.7

2.1

107

103

107

110

115

115

91

119

91

128

102

109

107



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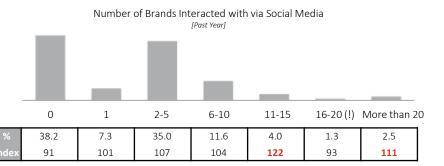
Market: Alberta

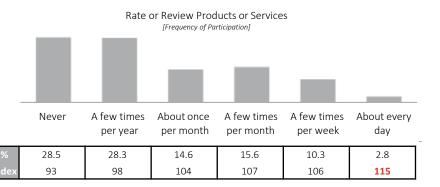
Social Media Usage

Social Media Overview

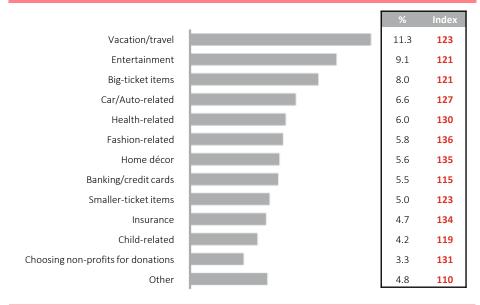
- 72% of Free Spirits from Alberta tend to access social media on their mobile phones during the morning hours, 68% during the afternoon hours
- 11% seek recommendations for Vacation/Travel Information via social media (Above Average)
- 84% believe that Social media companies should not be allowed to own or share their personal information

Brand Interaction





Seek Recommendations via Social Media*



Top Social Media Attitudes**

Free Spirits from Alberta are private about sharing their personal information online

"Social media companies should not be allowed to own or share my personal information" 84% | Index = 98

"I tend to ignore marketing and advertisements when I'm in a social media environment" 70% | Index = 97

"I would be more inclined to participate in SM if I knew my personal info would not be owned/shared by company" 72% | Index = 99

"Use SM to stay connected with personal contacts" 46% | Index = 105

Target Group

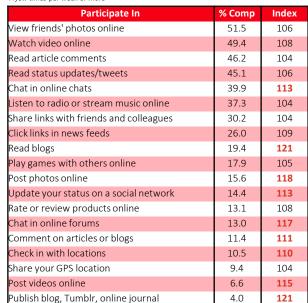


PRIZM Segments Included (by SESI): 03, 08, 10, 15, 18, 24, 30, 31, 57, 61, 64 Market: Alberta

Social Media Usage

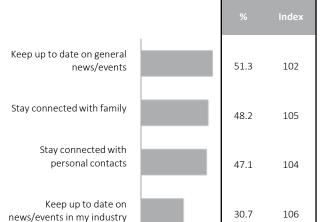
Frequency of Participation*

A few times per week or more



Social Media Uses*

A few times per week or more



Number of Connections Across all social media

150-199

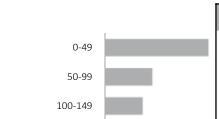
200-299

300-399

400-499

500-1000

More than 1000



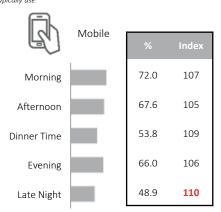


5.5

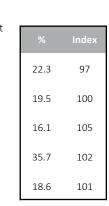
111

Social Media Access

Typically use







Stav connected with

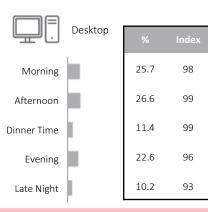
work/professional contacts



22.6

113

%	Index
24.9	97
27.4	102
16.3	101
36.1	103
16.0	102



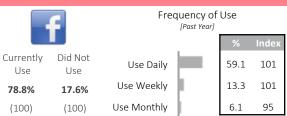


PRIZM Segments Included (by SESI): 03, 08, 10, 15, 18, 24, 30, 31, 57, 61, 64 **Market:** Alberta

Social Media Usage

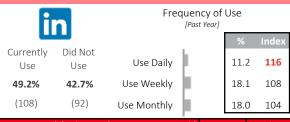


Facebook



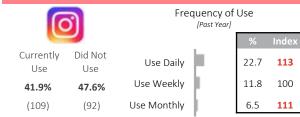
(100) (100)	Use Monthly	6.1	. 95
Participate In* (at leas	st a few times per week	() % Comp	Index
Read my news feed		57.4	103
Comment/Like other u	sers' posts	49.0	104
Watch videos		41.7	106
Use Messenger		40.7	103
Watch live videos		19.4	112
Like or become a fan o	f a page	15.5	106
Post photos		14.6	112
Click on an ad		14.2	110
Update my status		13.9	113
Post videos		7.6	119
Create a Facebook gro	up or fan page	5.1	122
Give to a Facebook fun	draiser (!)	3.1	125
Create a Facebook fund	draiser (!)	2.4	122

LinkedIn



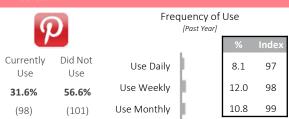
(108)	(92)	Use Monthly	р.	18.	0 104
Participate In* (a	t least a	few times per we	eek)	% Comp	Index
Read your newsfe	ed			13.3	119
View a job postina	g			10.6	124
Search and reviev	v other p	rofiles		7.5	114
Watch videos				7.4	116
Create a connecti	on			5.1	115
Update your prof	ile inforn	nation		4.2	119
Comment on con	tent			3.8	109
Click on an ad (!)				3.4	117
Post an article, vic	deo or pi	cture (!)		3.0	125
Participate in Link	edIn for	ums (!)		2.6	115
Request a recomr	mendatio	on (!)		2.6	116
Join a LinkedIn gr	oup (!)			2.1	108

nstagram



· ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '		
Participate In* (at least a few times per week)	% Comp	Index
View photos/videos	28.9	112
Like photos/videos	24.8	115
Comment on photos/videos	14.4	114
Watch live videos	14.3	120
Send direct messages	12.0	124
View a brand's page	9.6	124
Post photos/videos	8.8	121
Watch IGTV videos	6.9	123
Click on ads	6.0	121

Pinterest

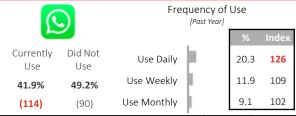


Reddit

Frequency of Use [Past Year] Currently Did Not Use Daily 5.0 131 Use Use Use Weekly 5.0 139 13.3% 78.7% (128)(96)Use Monthly 2.9 107

Participate In* (at least a few times per month)	% Comp	Index
View content	10.2	133
Follow specific Subreddits	7.1	133
Vote on content	5.2	142
Post content	3.0	135

WhatsApp

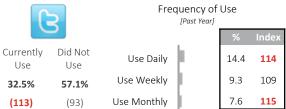


Participate In* (at least a few times per week)	% Comp	Index
Send/receive messages	27.3	122
Send/receive images	24.6	124
Use group chats	19.4	126
Use voice calls	12.7	128
Send/receive documents and files	12.1	130

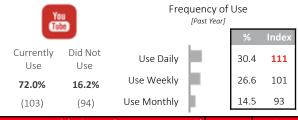


PRIZM Segments Included (by SESI): 03, 08, 10, 15, 18, 24, 30, 31, 57, 61, 64 Market: Alberta

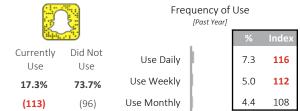
Social Media Usage



(113)	(93)	Use Monthly	1	7.6	115
Participate In* (a	t least a	few times per w	eek)	% Comp	Index
Read tweets				21.6	114
Watch videos				12.9	115
Tweet				8.0	118
Respond to tweet	:S			8.0	124
Retweet				7.4	124
Send or receive d	irect mes	sages		7.3	122
Share a link to a b	log post	or article of inter	est	6.8	115
Follow users who	follow yo	ou		6.3	118
Watch live videos			6.2	117	
Actively follow ne	w users			5.3	117
Click on an ad				3.6	114



(94)	Use Monthly	Use Monthly		5 93
(at least a	few times per we	eek)	% Comp	Index
			47.4	109
ideos			15.4	117
os			14.2	107
			9.3	122
Leave comment or post response on video			7.7	123
Click on an ad			7.4	106
Embed a video on a web page or blog			4.9	118
t a video			3.6	131
	(at least a decos os tor post recon a web p	(at least a few times per we ideos os t or post response on video on a web page or blog	(at least a few times per week) ideos os t or post response on video on a web page or blog	(at least a few times per week) % Comp 47.4 47.4 ideos 15.4 os 14.2 9.3 7.7 7.4 7.4 on a web page or blog 4.9

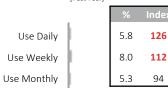


(113)	(50)	,	1		
Participate In*	(at least a f	few times per we	eek) % C	omp	Index
Receive photos/	'videos		9	.4	117
Send direct text	messages		7	.4	111
Send photos/vid	leos		7	.3	117
Use filters or eff	ects		5	.3	128
Read Snapchat o	discover/Ne	ews	5	.1	134
Use group chat			4	.0	128
View a brand's s	naps		3	.4	130
Use video chat			2	.7	122
View ads			2	.6	116

Audio Podcasts



Frequency of Use [Past Year]



Participate In* (at least a few times per week)	% Comp	Index
Listen to another genre of podcast	5.8	130
Listen to a news podcast	5.6	125
Listen to an educational podcast	5.0	125
Listen to a comedy podcast	4.6	135
Listen to a business podcast	4.0	119
Listen to a sports podcast	3.7	119
Subscribe to a sports podcast**	3.4	123
Listen to a technology focused podcast	3.1	125
Subscribe to another genre of podcast	2.9	124
Subscribe to a educational podcast	2.2	119
Subscribe to a news podcast	2.0	117
Subscribe to a comedy podcast (!)	1.9	121
Subscribe to a business podcast (!)	1.6	120
Subscribe to a technology podcast (!)	1.5	121

Source: Environics Analytics 2020

Other Social Media Platforms

Tinder			Tik '	Tok	
	Currently Use	Did Not Use	45	Currently Use	Did Not Use
	2.9%	93.3%		2.5%	93.8%
	(131)	(99)		(110)	(99)

Frequency of Use -Tinder [Past Year]

