TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

February 24, 2022

Tobermory, Ontario

ENVIRONICS ANALYTICS

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DESTINATION ONTARIO

PROJECT OVERVIEW

To better understand Ontario visitors who frequent different experiences within the province, we analyzed 16 tourism product categories provided by Destination Ontario.

The outcome of the analysis will allow Ontario Tourism Operators to better understand who local and non–local visitors to the 16 product categories are.

The product category reports will assist operators to:

- Target the right audience with the right experiences
- Identify the right platform and advertising channel to find their audience
- Access postal code information of potential high–value audiences
- Understand the unique attributes of potential high–value audiences for creative insight

WHAT IS NOT INCLUDED

Some product categories were not included as they were too difficult to analyze:

- Product categories that are difficult to be portrayed on a map, or do not have clearly defined boundaries, e.g. trails
- Product categories that include POIs in dense areas that are difficult to isolate from neighbouring businesses, i.e. restaurants and bars
- Point of interests (POI) that have small sample size or low foot traffic making it difficult to analyze
- Point of Interest (POI) where a business is located within the area of another business which also makes it difficult to isolate

METHODOLOGY

PROJECT PHASES

With the guidance of Destination Ontario, target audiences for the 16 product categories were identified as follows:

1. **Determine Product Categories** -16 Categories
2. **Identify Point of Interest (POI) for each product category** -136 POIs
3. **Create Geofence for 136 POIs**

3. **Mobile Data Extract for each POI**
4. **Identify Visitors**
5. **Profile Visitors**
6. **Create Target Groups**

PRODUCT CATEGORIES

GROUP 1:

1. Attractions & Theme Parks
2. Spas & Retreats
3. Resorts
4. ATV
5. Angling
6. Indigenous Experiences
7. Francophone Experiences
8. Major & Minor League Sports

GROUP 2:

1. Theatre & Film
2. Musuems, Heritage Sites, Science & Education
3. Art Galleries
4. Opera, Ballet & Symphony
5. Foodie Destinations, Food Trails & Festivals
6. Wine Regions
7. Breweries, Cideries & Distilleries
8. Farmers' Markets

METHODOLOGY

Using privacy compliant mobility app–based data (MobileScapes) and syndicated survey data (Numeris), EA identified Destination Ontario visitors by experience/product and overlayed consumer segments (PRIZM) to create key Visitor target groups.

	Local Visitors	Non–Local Visitors
Community Attractions	Visitors enjoying community attractions within 40km from their home	Visitors who travel more than 40km to enjoy community attractions
Major Attractions	Visitors enjoying bigger mass venues within 40km from their home – often these are people living in the city	Visitors who travel more than 40km to enjoy bigger mass venues

Sources: PRIZM, MobileScapes , Numeris, DemoStats

ANGLING SUMMARY

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ANGLING:
NON-LOCAL VISITORS

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ANGLING NON–LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

	Who are they?*	Market Size		Where do they visit? Community Attractions		
	Target Group Description	Count	% of Total	Visitor Behaviour Comp%	Visitor Behaviour Index*	Non–Local Visitors for Community Attractions
NON–LOCAL TARGET GROUPS	**TG 1** **Middle–aged suburban families with school–aged children.** They tend to hold college diplomas, work in white–collar occupations and earn well above–average household incomes.	1.0M	8.5%	22.4%	263	
	TG 2 **Older rural lower income couples.** They are likely to utilize their trades or college educations in blue–collar occupations, earning below–average household incomes.	1.5M	12.3%	54.1%	440	
	TG 3 **Mature urban lower income singles and couples.** Likely to hold high school or trades certificates, these individuals tend to work in grey– or blue–collar occupations, earning below–average household incomes.	826K	6.8%	10.4%	154	

Source: PRIZM, MobileScapes, DemoStats
Benchmark: Ontario for DemoStats & Ontario excluding Local–Community Market for MobileScapes

Index Legend:	< 90 Below Average	91 – 109 Average	110 + Above Average

ANGLING BEST **NON–LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Middle–aged suburban families with school–aged children

Who are they?*

- **College** Diploma
- **White–collar**
- **Well-above–average** household income
- **Less likely** to be culturally diverse

What do they like to do?*

- Sporting and Racing Events
- National or Provincial Park
- Craft Shows
- Skiing–Cross Country and Downhill
- ATV/Snowmobiling
- Curling

How do they think?*

- Want Control
- Committed to Health
- Need for Escape
- Guided by Reason and Logic
- Want to Leave a Legacy

Platforms & Advertisement Channels?*

- Radio: Today's Country, Mainstream Rock
- TV: Golf, Curling, NFL, Auto Racing
- Newspaper: National Post, Community
- Internet: Moderate Users (3–4 hrs/day)
- Social Media: Pinterest

Find out where they live**

- The corresponding FSA Ranking file helps by providing postal codes near your business

Source: PRIZM, MobileScapes, DemoStats, SocialValues, Numeris
Benchmark: Ontario for DemoStats, Numeris & Canada for SocialValues

* Chosen from index ranking with minimum 5% composition
** Ranked by count of total household pop 15+ in Ontario

ANGLING BEST **NON–LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older rural lower income couples

Who are they?*

- **Trades** or **College** Certificate
- **Blue–collar**
- **Below–average** household income
- **Less likely** to be culturally diverse with a high Indigenous Community presence

What do they like to do?*

- Sporting and Racing Events
- Parks/ City Gardens
- Theatre–Community and Festivals
- Concerts–Casinos and Outdoor Stages
- ATV/Snowmobiling
- Power Boating/Jet Skiing

How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Trust Small Business
- Need for Escape
- Financial Concern Regarding the Future

Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Sports Games, Home Reno, Talk Shows
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Canadian Living
- Internet: Light Users (0–2 hrs/day)
- Social Media: Pinterest

Find out where they live**

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ANGLING BEST **NON–LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Mature urban lower income singles and couples

Who are they?*

- **High School** or **Trades** Certificate
- **Grey-** or **Blue–collar**
- **Below–average** household income
- **Less likely** to be culturally diverse

What do they like to do?*

- Carnivals/Fairs
- Parks/City Gardens
- Home and Craft Shows
- Theatre–Community Theatre
- Concerts–Outdoor Stages
- Fishing/Hunting

How do they think?*

- Need for Escape
- Prefer Ethical Companies
- Open to Learn from Diversity
- Trust Small Business
- Vitality

Platforms & Advertisement Channels?*

- Radio: Today's Country, Mainstream Rock
- TV: CFL, NFL, Golf, Daytime Soaps
- Newspaper: Community Newspaper
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Pinterest, Facebook

Find out where they live**

- The corresponding FSA Ranking file helps by providing postal codes near your business

Source: PRIZM, MobileScapes, DemoStats, SocialValues, Numeris
Benchmark: Ontario for DemoStats, Numeris & Canada for SocialValues

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THANK YOU

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Appendix

- **Well-educated:** Holding bachelor's degree or above
- **Average Household Income:** $116,878 (**Above-average income:** >$120K; **Below-average income:** <$160K and **Average income:** $106-120K)
- **Total Visible Minority:** Average %comp is 32.5%
- **White-Collar Occupations:**
  - Management
  - Business and Finance
  - Sciences and Technical Professions
  - Healthcare
  - Government and Education
- **Grey-Collar Occupations:**
  - The Arts and Sports
  - Sales and Service
- **Blue-Collar Occupations:**
  - Trades
  - Primary Industries
  - Manufacturing

Benchmark: Ontario