

An underwater photograph showing a diver swimming through a narrow opening in a large ice formation. The water is a deep blue, and the ice is white and translucent. The diver is positioned in the center of the frame, facing away from the camera and slightly to the right. The lighting is dramatic, with bright light coming from the opening ahead, creating a silhouette effect on the diver and highlighting the textures of the ice.

TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

March 3, 2022

Tobermory, Ontario

ENVIRONICS
ANALYTICS

An Agency of the Government of Ontario

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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

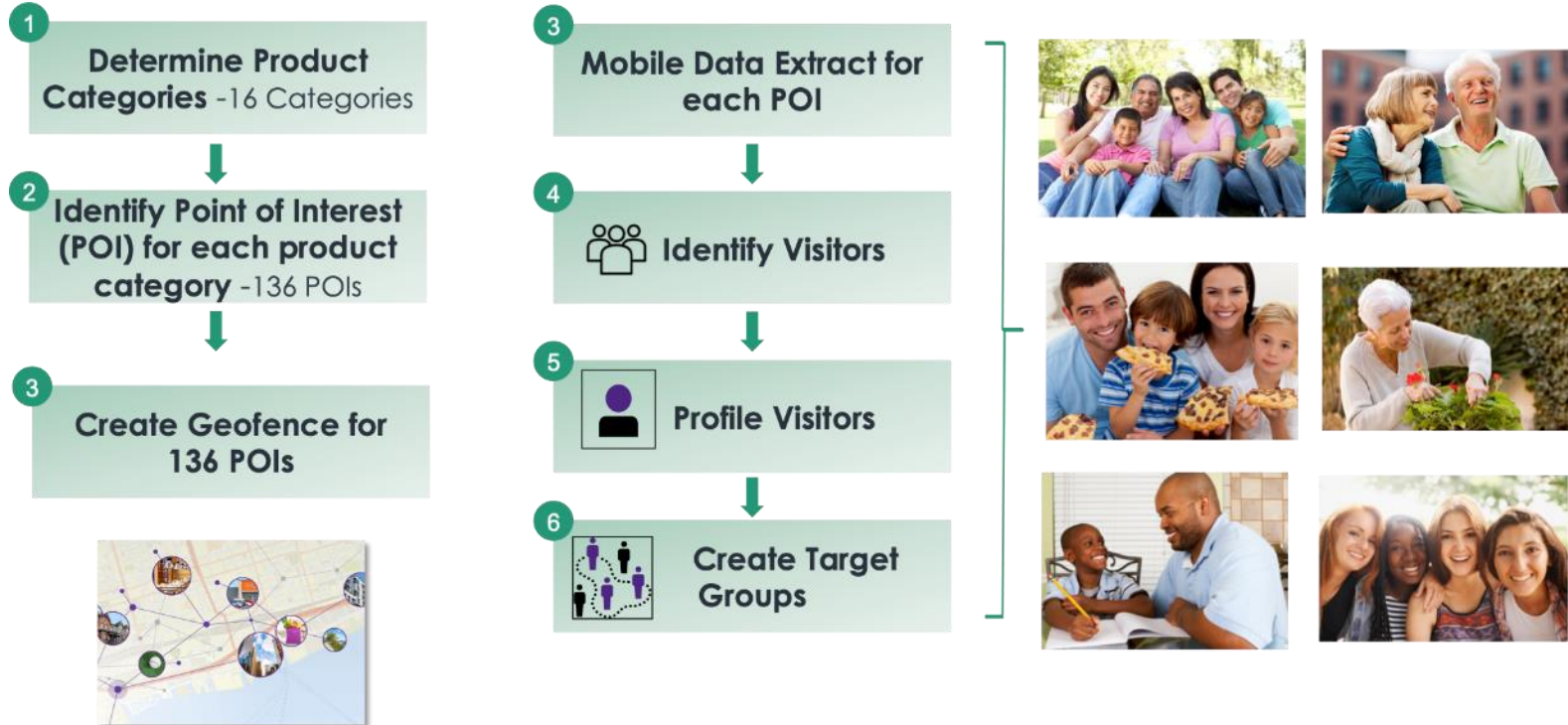
Some product categories were not included as they were too difficult to analyze:

- 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:





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

METHODOLOGY

Using privacy compliant mobility app-based data (MobileScapes) and syndicated survey data (Numeris), EA identified Destination Ontario visitors by experience/product and overlaid 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

BREWERIES, CIDERIES & DISTILLERIES SUMMARY






BREWERIES, CIDERIES & DISTILLERIES: LOCAL VISITORS

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BREWERIES, CIDERIES & DISTILLERIES LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

Please refer to each Target Group profile for full detail		Who are they?	Where do they visit?									
			Major Attractions					Community Attractions				
			Market Size		Visitor Behaviour		Local Visitors for Major Attractions	Market Size		Visitor Behaviour		Local Visitors for Community Attractions
		Count*	% of Total	Comp%	Index	Count**		% of Total	Comp%	Index		
LOCAL TARGET GROUPS	TG 1	Diverse younger to middle-aged urban singles living in rented high-rise apartments. These well-educated individuals work in white-collar jobs and earn average household incomes.	669K	13.3%	19.8%	148		707K	9.2%	4.5%	49	
	TG 2	Wealthy older urban families living with adult children at home. These households have university educations and work in white-collar occupations earning well-above-average incomes.	578K	11.5%	13.5%	118		648K	8.4%	4.8%	57	
	TG 3	Upscale older suburban and rural families living in single-detached houses. They have trades or college educations and earn above-average incomes through white- or blue-collar jobs.	220K	4.4%	4.4%	101		1.2M	16.2%	37.0%	229	
	TG 4	Retired older to mature suburban empty-nesters with below-average income. They are likely to be retired with below-average incomes.	79K	1.6%	1.2%	75		729K	9.5%	22.8%	241	
	TG 5	Younger Indigenous urban singles and couples with modest incomes. These individuals have modest educations and work in grey- or blue-collar occupations. They earn below-average incomes.	77K	1.5%	1.3%	82		362K	4.7%	8.2%	175	

BREWERIES, CIDERIES & DISTILLERIES BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse younger to middle-aged urban singles living in rented high-rise apartments



Who are they?*

- **Well-educated**
- **White-collar**
- **Average** household income
- **Culturally diverse** with a strong presence within Chinese Community



What do they like to do?*

- Film Festivals
- Ballet/Opera/Symphony
- Dancing/Night Clubs
- Theatre and Concerts-Various Venues
- Marathon
- Adventure Sports



Platforms & Advertisement Channels?*

- Radio: Alternative Rock, News/Talk
- TV: Tennis, Sci-Fi and Late-Night Talk Shows
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, Twitter, YouTube, Online Dating Sites



How do they think?*

- Open to Learn from Diversity
- Ecological Concern
- Pursuit of Originality
- Committed to Health
- Want Control



Find out where they live**

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

BREWERIES, CIDERIES & DISTILLERIES BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Wealthy older urban families living with adult children at home



Who are they?*

- **Well-educated**
- **White-collar**
- **Well-above-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Ballet/Opera/Symphony
- Film Festivals
- Theatre and Concerts –Various Venues
- Visiting Professional Sports-Basketball
- Skateboarding
- Skiing-Cross Country and Downhill



Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, News/Talk
- TV: Soccer, Golf, News/Current Affairs
- Newspaper: The Globe and Mail
- Internet: Moderate Users (2-4 hrs/day)
- Social Media: LinkedIn, Snapchat



How do they think?*

- Open to Learn from Diversity
- Want Control
- Interest Based Buying
- Ecological Concern
- Skeptical of Small Business



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BREWERIES, CIDERIES & DISTILLERIES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Upscale older suburban and rural families living in single-detached houses



Who are they?*

- **Trades** or **College** Certificate
- **White-** or **Blue-collar**
- **Above-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Sporting and Racing Events
- National or Provincial Park
- Home and Craft Shows
- Theatre-Community Theatres
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Want Control
- Enjoy Being One with Nature
- Technology Anxiety
- Guided by Reason and Logic



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BREWERIES, CIDERIES & DISTILLERIES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Retired older to mature suburban empty-nesters with below-average income



Who are they?*

- **Trades** or **College** Certificate
- **Retired**
- **Below-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Sporting and Racing Events
- Parks/City Gardens
- Home and Craft Shows
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Curling, Figure Skating, CFL, Golf
- Newspaper: Community Newspaper
- Magazine: Canadian Living, CAA Magazine
- Internet: Light Users (0-2 hrs/day)
- Social Media: Pinterest



How do they think?*

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



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BREWERIES, CIDERIES & DISTILLERIES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Younger Indigenous urban singles and couples with modest incomes



Who are they?*

- **No Certificate/Diploma**
- **Grey-** or **Blue-collar**
- **Below-average** household income
- **Less likely** to be culturally diverse with a high Indigenous Community presence



What do they like to do?*

- Carnivals/Fairs
- Music Festivals
- Popular Music/Rock Concerts
- Home, Craft and Auto Shows
- Theatre and Concerts-Various Venues
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

- Financial Concern Regarding the Future
- Prefer Ethical Companies
- Need for Escape
- Interest in Diversity
- Trust Small Business



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BREWERIES, CIDERIES & DISTILLERIES: NON-LOCAL VISITORS

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BREWERIES, CIDERIES & DISTILLERIES NON-LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

NON-LOCAL TARGET GROUPS		Who are they?	Market Size		Where do they visit?					
					Major Attractions			Community Attractions		
		Target Group Description	Count	% of Total	Visitor Behaviour		Non-Local Visitors for Major Attractions	Visitor Behaviour		Non-Local Visitors for Community Attractions
					Comp%	Index		Comp%	Index	
	TG1	Middle-aged to older suburban families with above-average incomes. These households are more likely to hold trades or college certificates and earn above-average incomes, working in management or trades sectors.	538K	11.9%	18.4%	154		15.8%	133	
	TG2	Retired, midscale mature suburban empty-nesters. Having trades or college certificates, they are likely to be retired and have incomes on par with the market average.	319K	7.1%	8.2%	116		10.0%	141	
	TG3	Middle-aged suburban families with school-aged children at home. These university-educated households are more likely to work in white-collar jobs and earn above-average household incomes.	619K	13.7%	20.4%	148		12.2%	89	
	TG4	Older to mature rural couples living in single-detached houses. They are likely to have modest educations and work in blue-collar occupations with below-average incomes.	578K	12.8%	10.8%	84		20.0%	156	

BREWERIES, CIDERIES & DISTILLERIES BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Middle-aged to older suburban families with above-average incomes



Who are they?*

- **Trades** or **College** Certificate
- **White-** or **Blue-collar**
- **Above-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Sporting and Racing Events
- National or Provincial Parks
- Craft Shows
- Curling
- Visiting Professional Sports-Hockey
- Fishing/Hunting



Platforms & Advertisement Channels?*

- Radio: Today's Country, Mainstream Rock
- TV: CFL, Auto Racing, Golf
- Internet: Moderate Users (3-4 hrs/day)
- Social Media: Pinterest



How do they think?*

- Need for Escape
- Want Control
- Reject Order
- Canada a 'Land of Opportunity'
- Optimistic



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BREWERIES, CIDERIES & DISTILLERIES BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Retired, midscale mature suburban empty-nesters



Who are they?*

- **Trades** or **College** Certificate
- **Retired**
- **Average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Sporting and Racing Events
- Parks/City Gardens
- Home and Craft Shows
- Theatre and Concerts-Various Venues
- Power Boating/Jet Skiing
- ATV/Snowmobiling



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Curling, Golf, CFL, Figure Skating
- Newspaper: Community Newspaper
- Internet: Light Users (0-2 hrs/day)
- Social Media: Pinterest



How do they think?*

- Proud Canadian
- Need for Escape
- Technology Anxiety
- Trust Small Business
- Want to Leave a Legacy



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BREWERIES, CIDERIES & DISTILLERIES BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Upscale middle-aged suburban families with school-aged children at home



Who are they?*

- **Well-educated**
- **White-collar**
- **Above-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Theme Parks
- Zoos/Aquariums
- Indoor Amusement Centres
- Visiting Professional Sports-Basketball
- Snowboarding
- Hockey and Basketball



Platforms & Advertisement Channels?*

- Radio: Sports, Mainstream Top 40
- TV: Children's Programs, Basketball
- Internet: Moderate Users (3-4 hrs/day)
- Social Media: Instagram, Twitter



How do they think?*

- Need for Escape
- Optimistic
- Want Control
- Open to Learn from Diversity
- Price Matters



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BREWERIES, CIDERIES & DISTILLERIES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature rural empty-nesters living in single-detached houses



Who are they?*

- Either **No Certificate/Diploma** or **Trades 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
- Home and Craft Shows
- Parks/City Gardens
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Curling, CFL, Contest Shows
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Canadian Living
- Internet: Light Users (0-1 hrs/day)
- Social Media: Pinterest, Facebook



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Guided by Reason and Logic
- Financial Concern Regarding the Future
- Trust Small Business



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A full-page background image showing a sunset over a body of water. The sky is filled with vibrant orange, red, and purple clouds. The sun is low on the horizon, creating a bright glow. In the foreground, a person is visible in a small boat on the water. The overall mood is serene and beautiful.

THANK YOU

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