TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

March 3, 2022

Tobermory, Ontario

ENVIRONICS ANALYTICS

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:
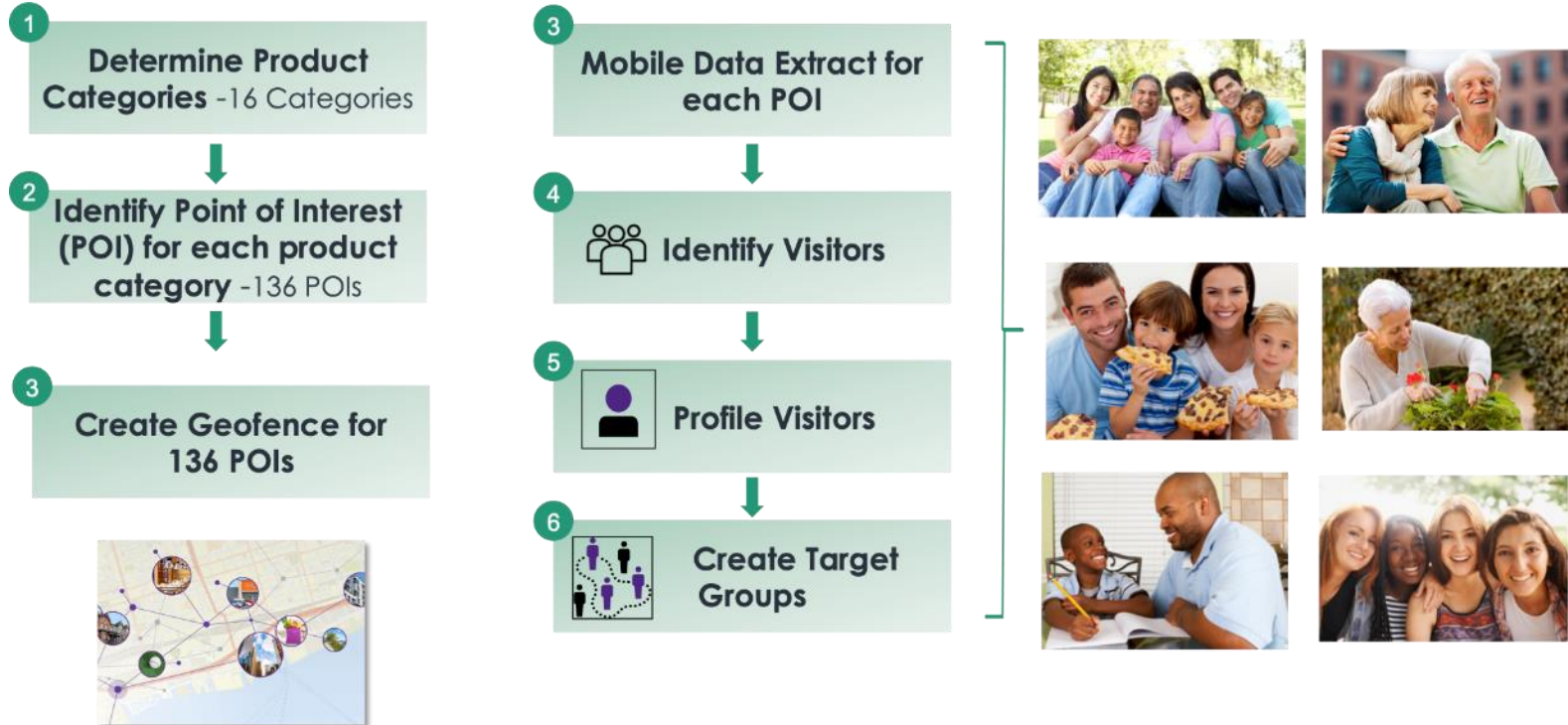
PRODUCT CATEGORIES

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 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

FARMERS' MARKETS SUMMARY

FARMERS' MARKET: LOCAL VISITORS

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FARMERS' MARKET LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

LOCAL TARGET GROUPS

		Who are they?	Where do they visit?								
			Major Attractions				Community Attractions				
		Target Group Description	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	
TG1		**Mature singles and couples with below-average income.** They tend to hold trades or college certificates and earn below-average household incomes.	332K	26.9%	30.7%	114	🎯	510K	18.4%	32.7%	178	🎯
TG2		**Upscale diverse middle-aged urban and suburban families.** These individuals have university educations in white-collar occupations and earn well-above-average household incomes.	205K	16.6%	21.0%	126	🎯	637K	23.0%	12.6%	55	
TG3		**Younger urban singles living in rented low-rise apartments.** They have modest educations and earn below-average incomes through the sales and service sector.	165K	13.4%	12.8%	96	🎯	209K	7.5%	13.9%	185	🎯
TG4		**Retired older suburban singles and couples living in single-detached houses.** With college or trades certificates, these households are likely to be retired with below-average incomes.	230K	18.6%	17.3%	93	🎯	389K	14.0%	28.9%	206	🎯

Source: PRIZM, MobileScapes, DemoStats
Benchmark: Ontario for DemoStats & *Local–Major Attraction Market, **Local–Community Market for MobileScapes

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

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FARMERS' MARKET BEST LOCAL MARKET POTENTIAL
FOR MAJOR AND COMMUNITY ATTRACTIONS

Mature urban and suburban singles and couples with below-average income

Who are they?*

- **Trades** or **College** Certificate

- **Blue-collar**

- **Below-average** household income

- **Less likely** to be culturally diverse

What do they like to do?*

- Beer/Food/Wine Festivals
- Home and Craft Shows
- Theatre-Community Theatres
- Concerts-Outdoor Stages
- Parks/City Gardens

Platforms & Advertisement Channels?*

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

How do they think?*

- Need for Escape
- Technology Anxiety
- Proud Canadian
- Want Control
- Accept Ethnic Diversity within Families

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

FARMERS' MARKET BEST **LOCAL** MARKET POTENTIAL
FOR MAJOR ATTRACTIONS

Upscale diverse middle-aged urban and suburban families

Who are they?*

- **Well-educated**

- **White-collar**

- **Well-above-average** household income

- **Culturally diverse** with a strong presence within South Asian Community

What do they like to do?*

- Dancing/Night Clubs
- Visiting Professional Sports-Soccer, Basketball
- Ballet/Opera/Symphony
- Theme Parks
- Basketball
- Adventure Sports

Platforms & Advertisement Channels?*

- Radio: Sports, All News
- TV: Soccer, Entertainment News Programs
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Snapchat, Twitter

How do they think?*

- Ostentatious Consumption
- Canada a 'Land of Opportunity'
- Vitality
- Trust Advertising
- Traditional Family

Find out where they live**

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FARMERS' MARKET BEST **LOCAL** MARKET POTENTIAL
FOR COMMUNITY ATTRACTIONS

Younger urban singles living in rented low-rise apartments

Who are they?*

- **No Certificate/Diploma**
- **Grey-collar**
- **Below-average** household income
- **Less likely** to be culturally diverse

What do they like to do?*

- Film and Music Festivals
- Comedy Clubs/Shows
- Dancing/Night Clubs
- Concerts–Various Venues
- Theatre–Community Theatres
- Martial Arts

Platforms & Advertisement Channels?*

- Radio: Multi/Variety/Specialty
- TV: Daytime Soap/Serial Dramas
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: YouTube

How do they think?*

- Open to Learn from Diversity
- Risk Taker
- Prefer Ethical Companies
- Need for Escape
- Price Matters

Find out where they live**

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FARMERS' MARKET BEST LOCAL MARKET POTENTIAL
FOR COMMUNITY ATTRACTIONS

Retired older suburban singles and couples living in single-detached houses

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
- Theatre and Concerts-Various Venues
- Home and Craft Shows
- ATV/Snowmobiling
- Power Boating/Jet Skiing

Platforms & Advertisement Channels?*

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

How do they think?*

- Need for Escape
- Proud Canadian
- Guided by Reason and Logic
- Trust Small Business
- Financial Concern Regarding the Future

Find out where they live**

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FARMERS' MARKET: NON-LOCAL VISITORS

FARMERS' MARKET 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	
TG 1	**Upscale diverse middle-aged to older families living with adult children at home.** They have university educations working in white-collar occupations with well-above-average incomes.	1.2M	13.3%	17.0%	128	🎯	18.2%	138	🎯
TG 2	**Older to mature rural empty-nesters with below-average incomes.** They are likely to hold either a college or trades certificate and work in blue-collar occupations with below-average household incomes.	704K	7.7%	14.7%	191	🎯	13.4%	174	🎯
TG 3	**Mature suburban couples with slightly-above average incomes.** They are likely to hold trades or college certificates and work in either health or trades sectors earning slightly above-average household incomes.	1.0M	10.9%	14.5%	132	🎯	8.3%	76	
TG 4	**Mature urban couples living in single-detached houses.** They are likely to hold high-school or trades diplomas and work in the trades sector.	493K	5.4%	7.2%	133	🎯	3.5%	64	
TG 5	**Retired older to mature empty-nesters living in rural areas.** These households are likely to be retired and have well-above-average household incomes.	478K	5.2%	4.2%	81		8.5%	162	🎯
TG 6	**Diverse younger to middle-aged urbanites living in rented high-rise apartments.** These university-educated individuals earn incomes on par with the market average through white-collar occupations.	807K	8.8%	6.5%	74		14.1%	160	🎯

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

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

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FARMERS' MARKET BEST NON-LOCAL MARKET POTENTIAL
FOR MAJOR AND COMMUNITY ATTRACTIONS

Upscale diverse middle-aged to older families living with adult children at home

Who are they?*

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

What do they like to do?*

- Ballet/Opera/Symphony
- Theme Parks
- Visiting Professional Sports-Basketball
- Curling
- Adventure Sports

Platforms & Advertisement Channels?*

- Radio: All News, Sports
- TV: Soccer, Basketball
- Internet: Moderate Users (3-4 hrs/day)
- Social Media: LinkedIn, Snapchat

How do they think?*

- Guided by Reason and Logic
- Committed to Health
- Open to Learn from Diversity
- Brand Matters
- Ostentatious Consumption

Find out where they live**

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

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FARMERS' MARKET BEST **NON-LOCAL** MARKET POTENTIAL
FOR MAJOR AND COMMUNITY ATTRACTIONS

Older to mature rural empty-nesters with below-average incomes

Who are they?*

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

What do they like to do?*

- Sporting and Racing Events
- Home and Craft Shows
- Parks/City Gardens
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Fishing/Hunting

Platforms & Advertisement Channels?*

- Radio: Classic Rock, Today's Country
- TV: Daytime Soap Operas, Contest Shows
- Newspaper: Community Newspaper
- Internet: Light Users (0-1 hrs/day)
- Social Media: Pinterest

How do they think?*

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

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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FARMERS' MARKET BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Mature suburban couples with slightly-above average incomes

Who are they?*

- **Trades** or **College** Certificate
- **White-** or **Blue-collar**
- **Slightly above-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-Community Theatres
- Concerts-Casinos
- ATV/Snowmobiling

Platforms & Advertisement Channels?*

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

How do they think?*

- Need for Escape
- Proud Canadian
- Accept Ethnic Diversity within Families
- Technology Anxiety
- Trust Small Business

Find out where they live**

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

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FARMERS' MARKET BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Mature urban couples with below-average incomes living in single-detached houses

Who are they?*

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

What do they like to do?*

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

Platforms & Advertisement Channels?*

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

How do they think?*

- Need for Escape
- Prefer Ethical Companies
- Financial Concern Regarding the Future
- Open to Learn from Diversity
- Flexible Definition Families

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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FARMERS' MARKET BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Retired older to mature empty-nesters living in rural areas

Who are they?*

- Either **No Certificate/Diploma** or **Trades** Certificate
- **Retired**
- **Well-above-average** household income
- **Less likely** to be culturally diverse

What do they like to do?*

- Sporting and Racing Events
- Music Festivals
- Home and Craft Shows
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing

Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Hits
- TV: Curling, Figure Skating
- Newspaper: The Globe and Mail, Community
- Magazine: CAA Magazine, Canadian Living
- Internet: Light Users (0-1 hrs/day)
- Social Media: Pinterest

How do they think?*

- Guided by Reason and Logic
- Enjoy Being One with Nature
- Financial Concern Regarding the Future
- Utilitarian Consumerism
- Prefer Ethical Companies

Find out where they live**

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

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FARMERS' MARKET BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Diverse younger to middle-aged urbanites 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: Classical Fine/Arts, News/Talk
- TV: Sci-Fi Shows, Tennis
- Newspaper: National Post
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, Twitter, YouTube

How do they think?*

- Value Authentic Brands
- Pursuit of Originality
- Committed to Health
- Ostentatious Consumption
- Ecological Concern

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

ENVIRONICS
ANALYTICS

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