

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.

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

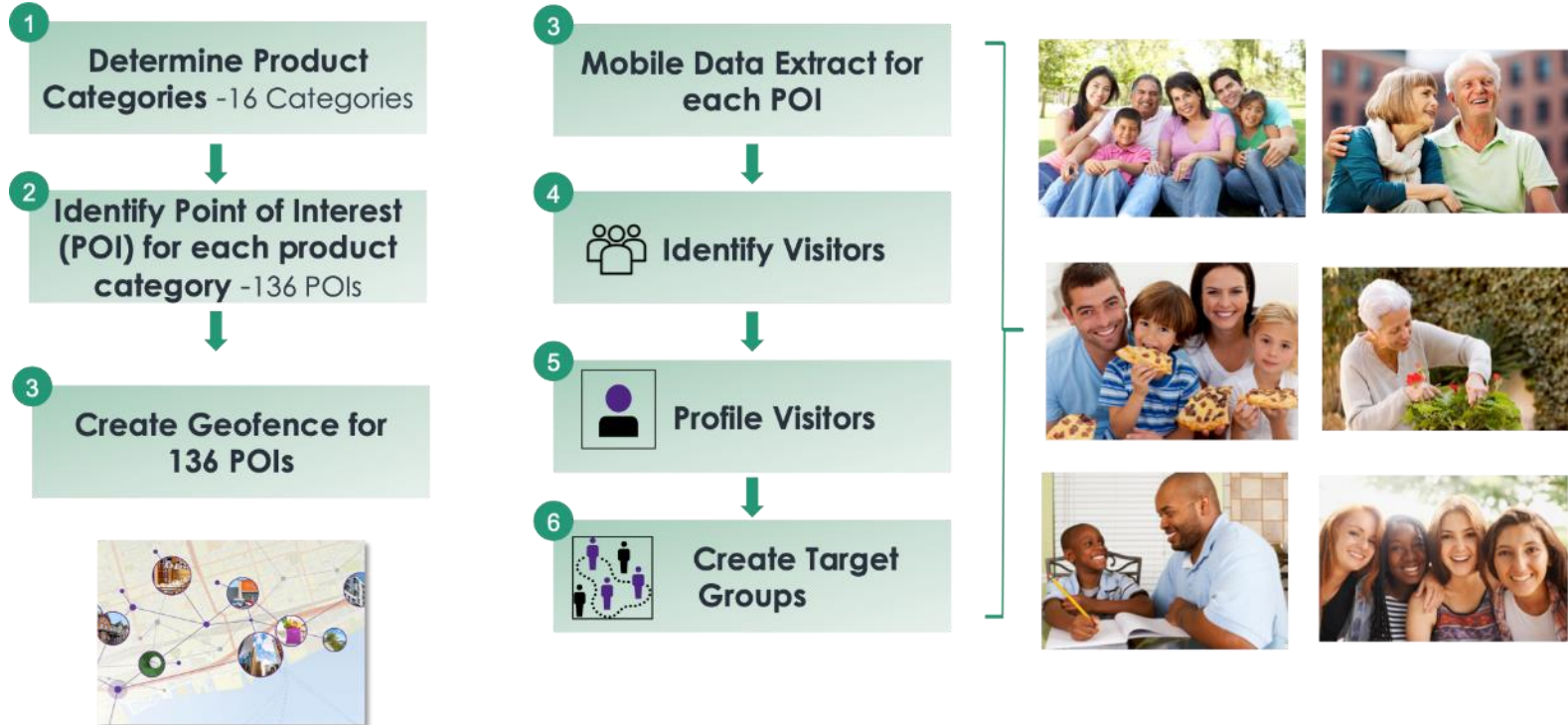
Some product categories were not included as they were too difficult to analyze:

- 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

FOODIE DESTINATIONS, FOOD TRAILS & FESTIVAL SUMMARY

FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS: LOCAL VISITORS










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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

LOCAL VISITORS' SUMMARY

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
Target Group Description		Count*	% of Total	Comp%	Index	Count*		% of Total	Comp%	Index		
LOCAL TARGET GROUPS	TG 1	Midscale, older to mature empty-nesters living in less urban areas. They are likely to work in the trades sector and earn slightly above-average incomes.	350K	4.5%	5.6%	124		288K	21.2%	40.3%	190	
	TG 2	Wealthy older families living with adult children in urban neighbourhoods. These university-educated households work in white-collar occupations.	814K	10.5%	13.8%	131		78K	5.7%	3.4%	59	
	TG 3	Diverse middle-aged urban fringe families living with school-aged children. They work in white-collar jobs and earn above-average incomes.	1.1M	13.7%	18.3%	133		76K	5.6%	1.8%	32	
	TG 4	Midscale, mature couples or older families. They are likely to have high school diplomas and work in the trades sector with slightly below-average take home incomes.	652K	8.4%	11.7%	139		169K	12.4%	6.9%	56	
	TG 5	Younger urban singles living in rented high-rise apartments. These university-educated urbanites are likely to work in white-collar occupations with below-average incomes.	1.2M	15.2%	20.4%	134		173K	12.8%	7.1%	56	
	TG 6	Middle-aged suburban families living in single-detached homes. They are likely to hold trades or college certificates and work in the trades sector with average incomes.	325K	4.2%	4.7%	112		231K	17.0%	14.7%	86	
	TG 7	Modest, younger non-family households living in urban areas. Primarily work-in blue-collar jobs and earn below-average incomes.	116K	1.5%	1.7%	116		117K	8.6%	11.6%	135	

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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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Midscale, older to mature empty-nesters living in less urban areas



Who are they?*

- **Trades** or **College** Certificate
- **Blue-collar**
- **Slightly 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 and Concerts-Various Venues
- Power Boating/Jet Skiing
- ATV/Snowmobiling



Platforms & Advertisement Channels?*

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



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Trust Small Business
- Guided by Reason and Logic
- Need for Escape



Find out where they live**

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

FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Wealthy older families living with adult children in urban neighbourhoods



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
- Theme Parks
- Theatre and Concerts-Various Venues
- Marathon
- Skiing-Downhill and Cross Country
- Skateboarding



Platforms & Advertisement Channels?*

- Radio: All News, Sports, News/Talk
- TV: NFL, Soccer
- Newspaper: The Globe and Mail
- Internet: Moderate Users (2-4 hrs/day)
- Social Media: Snapchat



How do they think?*

- Want Control
- Open to Learn from Diversity
- Vitality
- Committed to Health
- Support Community



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse middle-aged urban fringe families living with school-aged children



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?*

- Ballet/Opera/Symphony
- Popular Music/Rock Concerts
- Concerts-Arenas
- Theatre-Major Theatres
- Basketball
- Hockey



Platforms & Advertisement Channels?*

- Radio: Sports, Mainstream Top 40
- TV: Soccer, Basketball, Children's Program
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Instagram, Twitter



How do they think?*

- Pursuit of Originality
- Feel Secure about Financial Future
- Prefer Looks over Function
- Ostentatious Consumption
- Price Matters



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Midscale, mature couples or older families



Who are they?*

- **High School** Diploma
- **Blue-collar**
- **Slightly below-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Sporting Events
- Music Festivals
- Concerts-Outdoor Stages
- Theatre-Community and Festivals
- Beer/Food/Wine Festivals



Platforms & Advertisement Channels?*

- Radio: Mainstream Rock, News/Talk
- TV: Golf, NFL, CFL
- Newspaper: Community Newspaper
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Facebook



How do they think?*

- Open to Learn from Diversity
- Interest in Diversity
- Need for Escape
- Proud Canadian
- Guided by Reason and Logic



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Younger urban singles living in rented high-rise apartments



Who are they?*

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



What do they like to do?*

- Film and Music Festivals
- Ballet/Opera/Symphony
- Comedy Clubs/Shows
- Theatre and Concerts-Various Venues
- Martial Arts
- Billiards/Pool



Platforms & Advertisement Channels?*

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



How do they think?*

- Open to Learn from Diversity
- Ecological Concern
- Want to Protect Environment
- Risk Taker
- Pursuit of Originality



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL COMMUNITY ATTRACTIONS

Middle-aged suburban families living in single-detached homes



Who are they?*

- **Trades** or **College** Certificate
- **Blue-collar**
- **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-Community Theatre
- ATV/Snowmobiling
- Curling



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Technology Anxiety
- Reject Order
- Proud Canadian
- Guided by Reason and Logic



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **LOCAL** MARKET POTENTIAL COMMUNITY ATTRACTIONS

Modest, younger non-family households living in urban areas



Who are they?*

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



What do they like to do?*

- Carnivals/Fairs
- Food/Wine Shows
- Home and Craft Shows
- Theatre-Community Theatre
- Concerts-Outdoor Stages
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Financial Concern Regarding the Future
- Prefer Ethical Companies
- Technology Anxiety
- Trust Small Business



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS: NON-LOCAL VISITORS





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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

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?					
	Target Group Description		Count	% of Total	Major Attractions			Community Attractions		
					Visitor Behaviour		Non-Local Visitors for Major Attractions	Visitor Behaviour		Non-Local Visitors for Community Attractions
					Comp%	Index		Comp%	Index	
TG1	Older suburban and rural families and couples earning above-average incomes. They are likely to hold trades or college certificates and work in the trades sector.		829K	22.9%	25.2%	110		9.7%	42	
TG2	Diverse upscale suburban middle-aged families. These university-educated households earn well-above-average household incomes, working in white-collar occupations.		421K	11.6%	13.8%	119		3.4%	30	
TG3	Older to mature singles and couples living in suburban areas. They are likely to work in the trades sector and earn below-average household incomes.		395K	10.9%	14.2%	130		5.3%	49	
TG4	Indigenous mature empty-nesters living in rural areas. They work in blue-collar jobs and earn below-average household incomes.		583K	16.1%	13.2%	82		57.8%	360	

FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Older suburban and rural families and couples earning above-average incomes



Who are they?*

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



What do they like to do?*

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



Platforms & Advertisement Channels?*

- Radio: Today's Country, Multi/Variety/Specialty
- TV: Golf, CFL, Curling, Auto Racing
- Newspaper: Community Newspaper
- Internet: Light Users (0-2 hrs/day)
- Social Media: Pinterest



How do they think?*

- Want Control
- Trust Small Business
- Enjoy Being One with Nature
- Discriminating Consumerism
- Need for Escape



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse upscale suburban middle-aged 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?*

- Theme Parks
- Indoor Amusement Centers
- Visiting Professional Sports-Basketball, Soccer and Hockey
- Snowboarding and Hockey
- Adventure Sports



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Price Matters
- Feel Secure about Financial Future
- Brand Matters
- Trust Advertising



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Older to mature singles and couples living in suburban areas



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
- Home and Craft Shows
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Fishing/Hunting
- Golfing



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Hits
- TV: CFL, Golf, Daytime Soap Operas
- Newspaper: National Post, Community
- Magazine: Canadian Living
- Internet: Light Users (0-2 hrs/day)
- Social Media: Facebook



How do they think?*

- Enjoy Being One with Nature
- Prefer Ethical Companies
- Proud Canadian
- Trust Small Business
- Need for Escape



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FOODIE DESTINATIONS, FOOD TRAILS & FESTIVALS

BEST **NON-LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Indigenous mature empty-nesters living in rural areas



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
- Fishing/Hunting



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Curling, Daytime Soap Operas
- 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
- Financial Concern Regarding the Future
- Support Community
- Utilitarian Consumerism
- Trust Small Business



Find out where they live**

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A person in a kayak is on a calm body of water, likely a lake, during a vibrant sunset. The sky is filled with dramatic, colorful clouds in shades of orange, red, and purple. The sun is low on the horizon, creating a bright glow and reflecting on the water's surface. In the far distance, a city skyline is visible against the horizon line.

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