

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 of the diver, creating a strong silhouette effect.

TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

February 24, 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

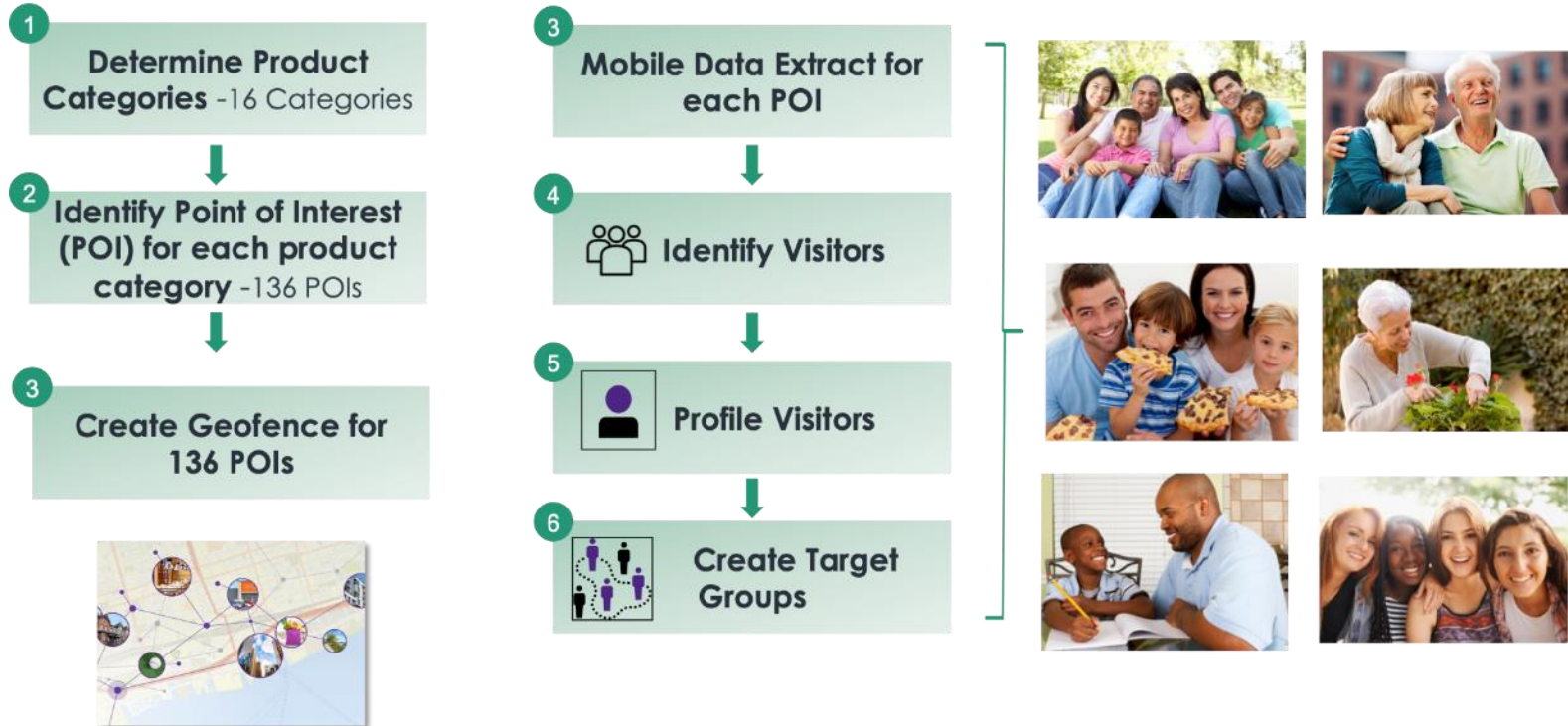
Some product categories were not included as they were too difficult to analyze:

- 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. Theatre & Film
2. Museums, 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 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

INDIGENOUS EXPERIENCES SUMMARY






INDIGENOUS EXPERIENCES: LOCAL VISITORS

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INDIGENOUS EXPERIENCES 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?*	Market Size		Where do they visit?		
					Community Attractions		
			Target Group Description	Count	% of Total	Visitor Behaviour	
Comp%	Index						
LOCAL TARGET GROUPS	TG 1	Older to mature suburban and town low-income singles and couples. They are likely to be retired from blue-collar occupations with below-average incomes.	66K	4.9%	16.0%	329	
	TG 2	Older to mature rural low-income empty-nesters. They tend to have modest educations and work in blue-collar occupations, earning below-average incomes.	136K	10.0%	23.6%	235	
	TG 3	Older to mature suburban lower income singles and couples. They utilize their trades or college educations by working in blue-collar occupations with below-average household incomes.	157K	11.6%	18.7%	160	
	TG 4	Younger urban lower income singles living in low-rise apartments. These modest educated urbanities are more likely to work in grey or blue-collar occupations, earning below-average incomes.	129K	9.5%	10.9%	115	
	TG 5	Older to mature suburban wealthy households either empty-nesters or living with their adult children at home. These university educated households tend to work in white-collar occupations with well-above-average take home incomes.	69K	5.1%	6.7%	131	

INDIGENOUS EXPERIENCES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban and town low-income singles and couples



Who are they?*

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



What do they like to do?*

- Music Festivals
- Home, Craft and Garden Shows
- Carnivals/Fairs
- Theatre and Concerts-Variety Venues
- ATV/Snowmobiling
- Fishing/Hunting



How do they think?*

- Enjoy Being One with Nature
- Support Community
- Trust Small Business
- Open to Diverse Cultures
- Financial Concern Regarding the Future



Platforms & Advertisement Channels?*

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



Find out where they live**

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

INDIGENOUS EXPERIENCES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature rural low-income empty-nesters



Who are they?*

- Either **No Certificate/Diploma** or **Trades** Certificate
- **Blue-collar**
- **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
- Concerts-Variety Venues
- Theatre-Variety Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

- Radio: Classic Country, Today's Country
- TV: Curling, Primetime Serial Dramas
- Magazine: CAA Magazine, Canadian Living
- Newspaper: Community Newspaper
- Internet: Light Users (0-2 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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INDIGENOUS EXPERIENCES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban lower income singles and couples



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
- Concerts–Various Venues
- Theatre–Community Theatre
- ATV/Snowmobiling
- Powerboating/Jet Skiing
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Utilitarian Consumerism
- Trust Small Business
- Enjoy Being One with Nature
- Technology Anxiety



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INDIGENOUS EXPERIENCES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Younger urban lower income singles living in low-rise apartments



Who are they?*

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



What do they like to do?*

- Home, Craft and Auto Shows
- Music Festivals
- Carnivals/Fairs
- Comedy Clubs/Shows
- Concerts-Outdoor Stages
- Theatre-Community Theatre
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

- Financial Concern Regarding the Future
- Prefer Ethical Companies
- Need for Escape
- Trust Small Business
- Open to Diverse Cultures



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INDIGENOUS EXPERIENCES BEST LOCAL MARKET POTENTIAL

FOR COMMUNITY ATTRACTIONS

Older to mature suburban wealthy households either empty-nesters or living with their 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?*

- Sporting Events
- Parks/City Gardens
- Home, Craft and Garden Shows
- Concerts-Variety Venues
- Theatre-Festivals and Community
- Curling
- Skiing-Cross Country and Downhill



Platforms & Advertisement Channels?*

- Radio: Multi/Variety/Specialty, News Talk
- TV: Golf, Curling, CFL, News/Current Affairs
- Newspaper: The Globe and Mail and Community
- Internet: Light Users (0-2 hrs/day)
- Social Media: Pinterest, Snapchat



How do they think?*

- Open to Learn from Diversity
- Canada a 'Land of Opportunity'
- Interest in Diversity
- Proud Canadian
- Support Community



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INDIGENOUS EXPERIENCES: NON-LOCAL VISITORS

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INDIGENOUS EXPERIENCES 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		Non-Local Visitors for Community Attractions
					Comp%	Index	
NON-LOCAL TARGET GROUPS	TG1	Older to mature mainly suburban empty-nesters. They are likely to have modest educations and work in blue-collar occupations, earning below-average incomes.	923K	8.5%	16.1%	190	
	TG2	Older to mature rural empty-nesters. They are likely to utilize their trades or college educations in blue-collar occupations, earning below-average household incomes.	899K	8.3%	16.7%	202	
	TG3	Older to mature suburban low-income singles and couples. They are likely to hold trades or college certificates and work in grey- or blue-collar occupations, earning below-average incomes.	823K	7.6%	15.7%	207	
	TG4	Younger urban singles living in rented apartments. These young urbanities have modest educations and work mainly in grey-collar occupations with below-average take home incomes.	1.0M	9.2%	14.1%	153	

INDIGENOUS EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature mainly suburban empty-nesters



Who are they?*

- Either **No Certificate/Diploma** or **Trades** Certificate
- **Blue-collar**
- **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-Community or Festivals
- ATV/Snowmobiling
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

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



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INDIGENOUS EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature rural empty-nesters



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
- Parks/City Gardens
- Theatre-Community and Festivals
- Concerts-Variety Venues
- Power Boating/Jet Skiing
- ATV/Snowmobiling



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Financial Concern Regarding the Future
- Trust Small Business
- Distrust Advertising



Platforms & Advertisement Channels?*

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



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INDIGENOUS EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban low-income singles and couples



Who are they?*

- **Trades** or **College** Certificate
- **Grey-** or **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
- Theatre- Community Theatre
- Concerts-Variety Venues
- ATV/Snowmobiling
- Fishing/Hunting



How do they think?*

- Need for Escape
- Proud Canadian
- Trust Small Business
- Utilitarian Consumerism
- Prefer Ethical Companies



Platforms & Advertisement Channels?*

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



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INDIGENOUS EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Younger urban singles living in rented 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?*

- Music and Film Festivals
- Home, Craft and Auto Shows
- Theatre-Community and Festivals
- Concerts-Outdoor Stages
- Carnivals/Fairs
- Martial Arts



Platforms & Advertisement Channels?*

- Radio: Multi/Variety, Today's Country
- TV: Tennis, Golf, CFL
- Newspaper: Community Newspaper
- Magazine: Canadian Living, Cineplex
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Facebook



How do they think?*

- Financial Concern Regarding the Future
- Prefer Ethical Companies
- Interest in Diversity
- Reject Social Inequality
- Want to Protect Environment



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A wide-angle photograph of a sunset over a body of water. 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. In the foreground, a person is seen from behind, paddling a kayak on the calm water. In the distance, a city skyline is visible on the horizon.

THANK YOU

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**DESTINATION
ONTARIO**

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