

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 in the ice, creating a strong contrast with the dark water.

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

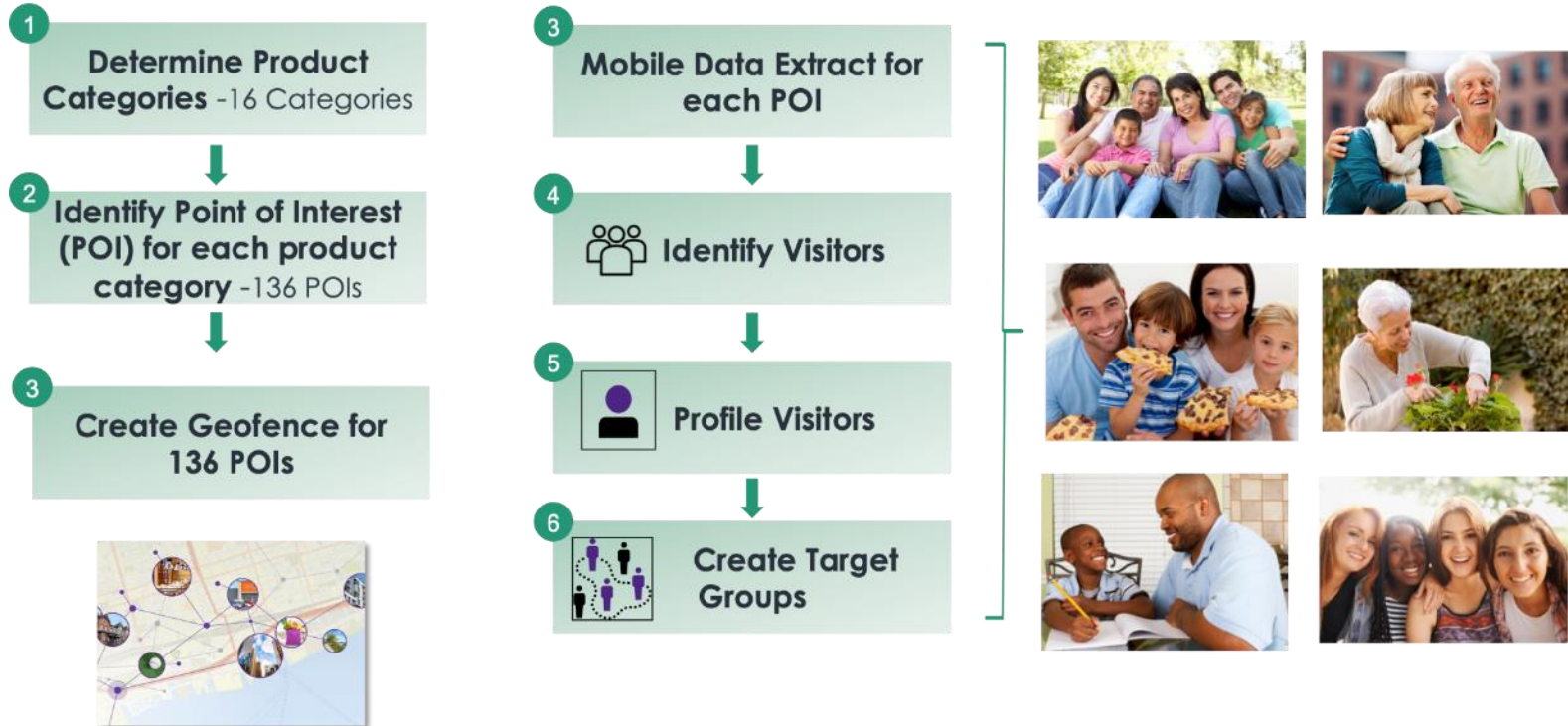
Some product categories were not included as they were too difficult to analyze:

- 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

MAJOR & MINOR LEAGUE SPORTS SUMMARY

MAJOR AND MINOR LEAGUE SPORTS: LOCAL VISITORS












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MAJOR & MINOR LEAGUE SPORTS LOCAL VISITORS' SUMMARY

Please refer to each Target Group Profile for full detail

LOCAL TARGET GROUPS

Who are they?*	Where do they visit?														
	Scotiabank Arena (Sep – Jun)					Rogers Centre					BMO Field				
	Market Size		Visitor Behaviour		Local Visitors for Scotiabank Arena	Market Size		Visitor Behaviour		Local Visitors for Rogers Centre	Market Size		Visitor Behaviour		Local Visitors for BMO Field
Count	% of Total	Comp%	Index	Count		% of Total	Comp%	Index	Count		% of Total	Comp%	Index		
Target Group Description															
Wealthy older urban families with adult children at home. They utilize their university educations working in white-collar jobs.	384K	7.7%	11.6%	150		385k	7.6%	10.0%	130		385K	7.6%	7.7%	101	
Diverse middle-aged suburban families. They hold university educations and work in white-collar jobs with above-average incomes.	970K	19.4%	22.2%	114		990K	19.7%	22.0%	112		1.0M	19.8%	22.2%	112	
Younger to middle-aged urban singles and couples in high-rise apartments. They earn above-average incomes via white-collar jobs.	987K	19.7%	25.1%	127		987k	19.6%	25.2%	128		987K	19.5%	25.1%	129	
Older middle-aged urban and suburban couples and families in single-detached houses. They utilize their trades or college educations in the trades sector.	238K	4.8%	4.8%	101		244K	4.9%	4.9%	102		260K	5.1%	5.0%	97	
Younger urban singles in rented low-rise apartments. With modest educations, they are likely to work in grey-collar jobs.	128K	2.6%	2.6%	104		127K	2.5%	2.3%	89		127K	2.5%	3.1%	123	

Source: PRIZM, MobileScapes, DemoStats









Benchmark: Ontario for DemoStats & Local-Market for Each Point of Interest for MobileScapes

Index Legend:	< 90 Below Average	91 – 109 Average	110 + Above Average
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MAJOR & MINOR LEAGUE SPORTS LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail		Who are they?*	Where do they visit?									
			Canadian Tire Centre					Hockey Hall of Fame				
			Market Size		Visitor Behaviour		Local Visitors for Canadian Tire Centre	Market Size		Visitor Behaviour		Local Visitors for Hockey Hall of Fame
Target Group Description		Count	% of Total	Comp%	Index	Count		% of Total	Comp%	Index		
LOCAL TARGET GROUPS	TG 1	Wealthy older urban families with adult children at home. They utilize their university educations working in white-collar jobs.	101K	9.0%	10.7%	119		385K	7.7%	9.6%	124	
	TG 2	Diverse middle-aged suburban families. They hold university educations and work in white-collar jobs with above-average incomes.	285K	25.4%	39.3%	155		970K	19.4%	18.2%	94	
	TG 3	Younger to middle-aged urban singles and couples in high-rise apartments. They earn above-average incomes via white-collar jobs.	50K	4.5%	4.1%	91		987K	19.7%	28.6%	145	
	TG 4	Older middle-aged urban and suburban couples and families in single-detached houses. They utilize their trades or college educations in the trades sector.	178K	15.9%	23.2%	146		240K	4.8%	3.7%	77	
	TG 5	Younger urban singles in rented low-rise apartments. With modest educations, they are likely to work in grey-collar jobs.	109K	9.7%	6.8%	70		128K	2.6%	3.0%	118	

MAJOR & MINOR LEAGUE SPORTS LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail		Who are they?*	Where do they visit?									
			TD Place					Tim Hortons Field				
			Market Size		Visitor Behaviour		Local Visitors for TD Place	Market Size		Visitor Behaviour		Local Visitors for Tim Hortons Field
		Count	% of Total	Comp%	Index	Count		% of Total	Comp%	Index		
LOCAL TARGET GROUPS	TG 1	Wealthy older urban families with adult children at home. They utilize their university educations working in white-collar jobs.	101K	8.6%	14.3%	167		120K	8.1%	4.0%	49	
	TG 2	Diverse middle-aged suburban families. They hold university educations and work in white-collar jobs with above-average incomes.	312K	26.4%	34.3%	130		455K	30.8%	15.4%	50	
	TG 3	Younger to middle-aged urban singles and couples in high-rise apartments. They earn above-average incomes via white-collar jobs.	50K	4.3%	7.2%	168		22K	1.5%	2.2%	147	
	TG 4	Older middle-aged urban and suburban couples and families in single-detached houses. They utilize their trades or college educations in the trades sector.	173K	14.6%	19.7%	135		394K	26.7%	38.2%	143	
	TG 5	Younger urban singles in rented low-rise apartments. With modest educations, they are likely to work in grey-collar jobs.	108K	9.1%	11.4%	125		80K	5.4%	12.2%	224	

MAJOR AND MINOR LEAGUE SPORTS BEST LOCAL MARKET POTENTIAL

FOR SCOTIABANK ARENA, ROGERS CENTRE, CANADIAN TIRE, HOCKEY HALL OF FAME, TD PLACE

Wealthy older urban families 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
- Theme Parks
- Visiting Professional Sports–Basketball
- Theatre and Concerts–Various Venues
- Skiing–Downhill and Cross Country
- Hockey



Platforms & Advertisement Channels?*

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



How do they think?*

- Open to Learn from Diversity
- Canada a 'Land of Opportunity'
- Interest Based Buying
- Value Authentic Brands
- Skepticism Toward Small Business



Find out where they live**

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

MAJOR AND MINOR LEAGUE SPORTS BEST LOCAL MARKET POTENTIAL

FOR SCOTIABANK ARENA, ROGERS CENTRE, CANADIAN TIRE, BMO FIELD, TD PLACE

Diverse middle-aged suburban families



Who are they?*

- **Well-educated**
- **White-collar**
- **Above-average** household income
- **Culturally diverse** with a strong presence within South Asian Community



What do they like to do?*

- Theme Parks
- Zoos/Aquariums
- Visiting Professional Sports–Basketball and Soccer
- Adventure Sports
- Basketball



Platforms & Advertisement Channels?*

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



How do they think?*

- Brand Matters
- Show off via their Home
- Trust Advertising
- Feel Secure about Financial Future
- Traditional Family



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MAJOR AND MINOR LEAGUE SPORTS BEST LOCAL MARKET POTENTIAL

FOR SCOTIABANK ARENA, ROGERS CENTRE, BMO, HOCKEY HALL OF FAME

Younger to middle-aged urban singles and couples in high-rise apartments



Who are they?*

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



What do they like to do?*

- Film and Music Festivals
- Ballet/Opera/Symphony
- Visiting Professional Sports–Basketball
- Theatre and Concerts–Various Venues
- Adventure Sports
- Health Club Activity



Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, 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



How do they think?*

- Open to Learn from Diversity
- Committed to Health
- Pursuit of Originality
- Interest in Diversity
- Ecological Concern



Find out where they live**

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MAJOR AND MINOR LEAGUE SPORTS BEST LOCAL MARKET POTENTIAL

FOR CANADIAN TIRE, TD PLACE, TIM HORTONS FIELD

Older middle-aged urban and suburban couples and families in single-detached houses



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
- Parks/City Gardens
- Visiting Professional Sports–Hockey
- Theatres and Concerts–Various Venues
- Curling
- ATV/Snowmobiling



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Reject Order
- Proud Canadian
- Technology Anxiety
- Flexible Definition Families



Find out where they live**

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MAJOR AND MINOR LEAGUE SPORTS BEST LOCAL MARKET POTENTIAL

FOR TD PLACE, TIM HORTONS FIELD

Younger urban singles in rented low-rise apartments



Who are they?*

- **High School** 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
- Visiting Professional Sports-Football
- Specialty Movie Theatres
- Theatre and Concerts-Various Venues
- Martial Arts



Platforms & Advertisement Channels?*

- Radio: Mainstream Rock, Today's Country
- TV: Sci-Fi Shows, Daytime Soaps
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Twitter, YouTube



How do they think?*

- Open to Learn from Diversity
- Prefers Ethical Companies
- Interest in Diversity
- Flexible Definition Families
- Financial Concern Regarding the Future



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MAJOR AND MINOR LEAGUE SPORTS: NON-LOCAL VISITORS

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MAJOR & MINOR LEAGUE SPORTS NON-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?											
					Scotiabank Arena (Sep – Jun)			Rogers Centre (Apr-Oct)			BMO Field (Full year)			Canadian Tire Centre (Sep-Jun)		
	Target Group Description	Count	% of Total	Visitor Behaviour		Non-Local Visitors for Scotiabank Arena	Visitor Behaviour		Non-Local Visitors for Rogers Centre	Visitor Behaviour		Non-Local Visitors for BMO Field	Visitor Behaviour		Non-Local Visitors for Canadian Tire Centre	
				Comp%	Index		Comp%	Index		Comp%	Index		Comp%	Index		
NON-LOCAL TARGET GROUPS	TG 1	Older urban wealthy families with adult children. They work in white-collar jobs.	413K	7.8%	13.0%	166		11.4%	145		13.6%	174		3.5%	45	
	TG 2	Diverse middle-aged suburban comfortable families. They utilize their university educations in white-collar jobs and earn above-average incomes.	873K	16.5%	30.4%	184		26.8%	162		31.7%	192		10.1%	61	
	TG 3	Suburban middle-aged suburban lower income families in row houses. They earn below-average incomes via blue-collar occupations.	430K	8.1%	10.4%	127		11.1%	136		10.8%	133		7.4%	91	
	TG 4	Older rural lower income empty-nesters. They earn below-average incomes via blue-collar jobs.	1.1M	19.9%	13.3%	67		13.2%	66		11.0%	55		35.3%	177	
	TG 5	Older suburban and rural low income singles and couples. They are likely to be retired households with below-average incomes.	570K	10.8%	7.3%	67		8.9%	82		7.5%	70		14.1%	131	
	TG 6	Older rural and suburban comfortable empty-nesters. They earn incomes on par with the market average via the trades sector.	764K	14.5%	11.5%	79		13.1%	91		10.5%	73		16.6%	115	












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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MAJOR & MINOR LEAGUE SPORTS NON-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?								
					Hockey Hall of Fame (Full year)			TD Place (Full year)			Tim Hortons Field (Sep-Dec)		
	Target Group Description	Count	% of Total	Visitor Behaviour		Non-Local Visitors for Hockey Hall of Fame	Visitor Behaviour		Non-Local Visitors for TD Place	Visitor Behaviour		Non-Local Visitors for Tim Hortons Field	
				Comp%	Index		Comp%	Index		Comp%	Index		
NON-LOCAL TARGET GROUPS	TG 1	Older urban wealthy families with adult children. They work in white-collar jobs.	413K	7.8%	14.1%	180		5.5%	71		9.3%	119	
	TG 2	Diverse middle-aged suburban comfortable families. They utilize their university educations in white-collar jobs and earn above-average incomes.	873K	16.5%	29.2%	177		9.5%	57		20.5%	124	
	TG 3	Suburban middle-aged suburban lower income families in row houses. They earn below-average incomes via blue-collar occupations.	430K	8.1%	8.7%	107		5.9%	72		9.1%	112	
	TG 4	Older rural lower income empty-nesters. They earn below-average incomes via blue-collar jobs.	1.1M	19.9%	12.8%	64		35.4%	178		10.1%	51	
	TG 5	Older suburban and rural low income singles and couples. They are likely to be retired households with below-average incomes.	570K	10.8%	8.6%	80		12.0%	111		12.1%	112	
	TG 6	Older rural and suburban comfortable empty-nesters. They earn incomes on par with the market average via the trades sector.	764K	14.5%	11.8%	82		17.0%	118		20.3%	140	

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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MAJOR AND MINOR LEAGUE SPORTS BEST NON-LOCAL MARKET POTENTIAL

FOR SCOTIABANK ARENA, ROGERS CENTRE, BMO, HOCKEY HALL OF FAME, TIM HORTONS FIELD

Older urban wealthy families with adult children



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
- Sporting Events
- Concerts-Arenas
- Theatre-Major Halls
- Hockey



Platforms & Advertisement Channels?*

- Radio: All News, Sports, Mainstream Rock
- TV: NFL, Golf, Soccer
- Internet: Moderate Users (2-4 hrs/day)
- Social Media: Snapchat



How do they think?*

- Want Control
- Open to Learn from Diversity
- Canada a 'Land of Opportunity'
- Guided by Reason and Logic
- Vitality



Find out where they live**

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

MAJOR AND MINOR LEAGUE SPORTS BEST NON-LOCAL MARKET POTENTIAL

FOR SCOTIABANK ARENA, ROGERS CENTRE, BMO, HOCKEY HALL OF FAME, TIM HORTONS FIELD

Diverse middle-aged suburban comfortable families



Who are they?*

- **Well-educated**
- **White-collar**
- **Above-average** household income
- **Culturally diverse** with a strong presence within South Asian Community



What do they like to do?*

- Theme Parks
- Zoos/Aquariums
- Indoor Amusement Centers
- Visiting Professional Sports–Basketball, Soccer and Hockey
- Hockey



Platforms & Advertisement Channels?*

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



How do they think?*

- Canada a 'Land of Opportunity'
- Need for Escape
- Brand Matters
- Want Control
- Trust Advertising



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MAJOR AND MINOR LEAGUE SPORTS BEST NON-LOCAL MARKET POTENTIAL

FOR SCOTIABANK ARENA, ROGERS CENTRE, BMO, HOCKEY HAL OF FAME, TIM HORTONS FIELD

Suburban middle-aged suburban lower income families in row houses



Who are they?*

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



What do they like to do?*

- Popular Music/Rock Concerts
- Home Shows
- Concerts-Outdoor Stages
- Theatre-Community Theatre
- Curling
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Technology Anxiety
- Proud Canadian
- Prefer Ethical Companies
- Questions Authority



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MAJOR AND MINOR LEAGUE SPORTS BEST NON-LOCAL MARKET POTENTIAL FOR CANADIAN TIRE, TD PLACE

Older rural lower income empty-nesters



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
- Visiting Professional Sports–Football, Hockey
- Theatre and Concerts–Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

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



How do they think?*

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



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MAJOR AND MINOR LEAGUE SPORTS BEST NON-LOCAL MARKET POTENTIAL FOR CANADIAN TIRE, TD PLACE, TIM HORTONS FIELD

Older suburban and rural low income singles and couples.



Who are they?*

- **Trades** or **College** Certificate
- **Retired**
- **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
- Craft Shows
- Visiting Professional Sports-Football
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

- Radio: Classic Country, Oldies
- TV: Curling, Figure Skating, CFL, Golf
- Magazine: CAA Magazine, Canadian Living
- Newspaper: Community Newspaper
- Internet: Light Users (0-3 hrs/day)
- Social Media: Pinterest



How do they think?*

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



Find out where they live**

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MAJOR AND MINOR LEAGUE SPORTS BEST NON-LOCAL MARKET POTENTIAL FOR CANADIAN TIRE, TD PLACE, TIM HORTONS FIELD

Older rural and suburban comfortable empty-nesters



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
- Visiting Professional Sports-Hockey
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

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



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Technology Anxiety
- Proud Canadian
- Trust Small Business



Find out where they live**

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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 in a small kayak on the water. In the distance, a city skyline is visible on the horizon.

THANK YOU

ENVIRONICS
ANALYTICS

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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