



# 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

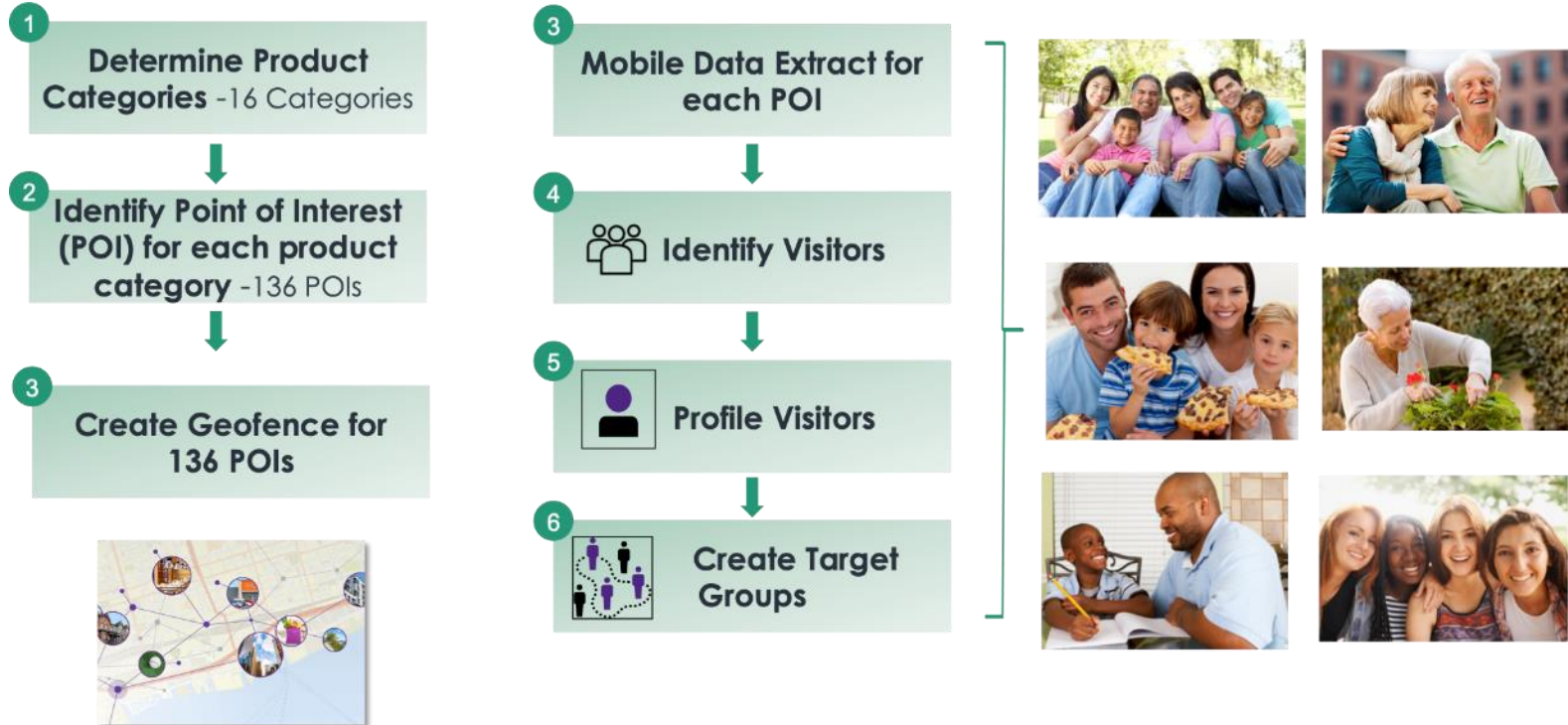
Some product categories were not included as they were too difficult to analyze:

- 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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION SUMMARY



# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION: LOCAL VISITORS

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# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## 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				
	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		
Target Group Description										
Wealthy older urban families living with adult children. These university-educated households work in white-collar jobs and earn well-above-average incomes.	495K	7.7%	10.4%	135		119K	3.7%	2.4%	65	
Diverse younger urban singles living in rented apartments. Working in white-collar jobs, these university-educated individuals earn below-average incomes.	837K	13.0%	18.6%	143		63K	2.0%	1.8%	93	
Diverse middle-aged urban families. They earn incomes on par with the market average working in white-collar jobs and live in high-rise apartments.	1.2M	17.9%	22.0%	123		225K	7.0%	1.7%	24	
Diverse multi-generational families residing in urban fringe areas. They work in white-collar jobs and earn slightly below-average household incomes.	613K	9.5%	10.6%	111		461K	14.4%	1.9%	13	
Older suburban couples living in single-detached houses. They are likely to hold trades or college certificates and work in the trades sector.	272K	4.2%	3.6%	86		782K	24.4%	43.9%	180	
Either younger or mature single urbanites living in rented apartments. They work in the sales and service or trades sectors and earn below-average incomes.	277K	4.3%	3.9%	90		394K	12.3%	21.5%	175	
Mature suburban singles with below-average incomes. They are likely to be retired and have below-average household incomes.	155K	2.4%	1.8%	76		260K	8.1%	11.0%	135	

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

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



### Platforms & Advertisement Channels?\*

- Radio: Classical/Fine Arts, All News
- TV: Golf, Figure Skating, NFL, Soccer
- Newspaper: The Globe and Mail
- Internet: Moderate Users (2-4 hrs/day)
- Social Media: Snapchat



### How do they think?\*

- Open to Learn from Diversity
- Want Control
- Value Authentic Brands
- Skeptical of Small Business
- Committed to Health



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse younger urban singles living in rented apartments



### Who are they?\*

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



### What do they like to do?\*

- Ballet/Opera/Symphony
- Film and Music Festivals
- Theatre and Concerts-Various Venues
- Dancing/Night Clubs
- Martial Arts
- Health Club Activity



### Platforms & Advertisement Channels?\*

- Radio: Alternative Rock, News/Talk
- TV: Tennis, Sci Fi 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
- Interest in Diversity
- Ecological Concern
- Committed to Health
- Pursuit of Originality



### Find out where they live\*\*

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# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse middle-aged urban families



### Who are they?\*

- **Well-educated**
- **White-collar**
- **Average** household income
- **Culturally diverse** with a strong presence within South Asian and Black Communities



### What do they like to do?\*

- Film Festivals
- Dancing/Night Clubs
- Concerts-Theatres/Halls
- Theatre-Major Theatres
- Martial Arts
- Basketball



- Radio: Classical/Fine Arts, Sports
- TV: Variety/Award Specials, Soccer
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Twitter, YouTube



### How do they think?\*

- Ostentatious Consumption
- Prefer Looks over Function
- Feel Secure about Financial Future
- Enjoy Advertising
- Interest in Diversity



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse multi-generational families residing in urban fringe areas



### Who are they?\*

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



### What do they like to do?\*

- Film Festivals
- Historical Sites
- Ballet/Opera/Symphony
- Theatre-Various Venues
- Basketball
- Adventure Sports



### Platforms & Advertisement Channels?\*

- Radio: Ethnic/Multicultural, All News
- TV: Soccer, Baseball, Basketball
- Newspaper: The Globe and Mail
- Magazine: Cineplex and Zoomer Magazine
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, YouTube



### How do they think?\*

- Ostentatious Consumption
- Value Authentic Brands
- Prefer Looks over Function
- Enjoy Advertising
- Skeptical of Small Business



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST **LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older suburban couples living 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
- National or Provincial Park
- Home and Craft Shows
- Theatre and Concerts-Variety Venues
- ATV/Snowmobiling
- Power boating/Jet Skiing



### Platforms & Advertisement Channels?\*

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



### How do they think?\*

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



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST **LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Either younger or mature single urbanites living in rented apartments



### Who are they?\*

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



### What do they like to do?\*

- Music Festivals
- Concerts-Outdoor Stages
- Theatre-Community Theatres
- Home Shows
- Fishing/Hunting



### Platforms & Advertisement Channels?\*

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



### How do they think?\*

- Need for Escape
- Technology Anxiety
- Financial Concern Regarding the Future
- Prefer Ethical Companies
- Interest in Diversity



### Find out where they live\*\*

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



# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST **LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Mature suburban singles with below-average incomes



### 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
- Theatre and Concerts-Various Venues
- Carnivals/Fairs
- Parks/City Gardens
- Craft Shows



### Platforms & Advertisement Channels?\*

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



### How do they think?\*

- Need for Escape
- Financial Concern Regarding the Future
- Proud Canadian
- Prefer Ethical Companies
- Trust Small Business



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION: NON-LOCAL VISITORS

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MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

NON-LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

	Who are they?	Market Size		Where do they visit?					
				Major Attractions			Community Attractions		
				Visitor Behaviour		Non-Local Visitors for Major Attractions	Visitor Behaviour		Non-Local Visitors for Community Attractions
	Target Group Description	Count	% of Total	Comp%	Index		Comp%	Index	
NON-LOCAL TARGET GROUPS	TG1 Upscale middle-aged to older suburban families. They are likely to hold trades or college diplomas and work in white-collar occupations.	1.1M	25.3%	32.0%	126		29.8%	118	
	TG2 Older urban families earning above average incomes. They are likely to hold university diplomas and work in the finance sector with above-average household incomes.	302K	6.8%	8.4%	125		4.8%	71	
	TG3 Diverse middle-aged suburban families. They live with school-aged children at home. Working in white-collar occupations, these university-educated households earn above-average incomes.	350K	7.8%	11.4%	145		3.0%	39	
	TG4 Retired older to mature rural empty-nesters with modest incomes. These college-educated households are more likely to be retired, having worked in trades occupations.	581K	13.0%	10.9%	84		18.0%	138	
	TG5 Diverse mature singles living in rented high-rise apartments. These households have modest educations. They are likely to work in the sales and service sector and earn below-average household incomes.	413K	9.3%	8.3%	90		15.2%	164	
	TG6 Indigenous older couples living in rural areas. They are more likely to be Indigenous and work in blue-collar occupations.	395K	8.8%	7.5%	85		11.0%	124	

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

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

Upscale middle-aged to older suburban families



## Who are they?\*

- **Trades** or **College** Certificate
- **White-collar**
- **Well-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-Community Theatre
- Concerts-Casinos
- Skiing-Cross Country



## Platforms & Advertisement Channels?\*

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



## How do they think?\*

- Need for Escape
- Accept Ethnic Diversity within Families
- Want Control
- Technology Anxiety
- Guided by Reason and Logic



## Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Older urban families earning above average incomes



### Who are they?\*

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



### What do they like to do?\*

- Indoor Amusement Centres
- Popular Music/Rock Concerts
- Ballet/Opera/Symphony
- Concerts-Various Venues
- Curling



### Platforms & Advertisement Channels?\*

- Radio: Mainstream Rock, Sports
- TV: Soccer, NFL
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Instagram, Pinterest



### How do they think?\*

- Open to Learn from Diversity
- Interest in Diversity
- Guided by Reason and Logic
- Proud Canadian
- Ecological Concern



### Find out where they live\*\*

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# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

## BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

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
- Specialty Movie Theatres
- Indoor Amusement Centers
- Snowboarding
- Basketball



### Platforms & Advertisement Channels?\*

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



### How do they think?\*

- Risk Taker
- Need for Escape
- Prefer Looks over Function
- Brand Matters
- Pursuit of Originality



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

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

Retired older to mature rural empty-nesters with modest incomes



### Who are they?\*

- **College** or **Trades** 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
- Skiing-Cross Country



### Platforms & Advertisement Channels?\*

- Radio: Classic Country, Today's Country
- TV: Curling, Primetime Serial Dramas
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Maclean's
- 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



### Find out where they live\*\*

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

# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

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

Diverse mature suburban singles living in rented high-rise apartments



### Who are they?\*

- **No Certificate/Diploma**
- **Grey-collar**
- **Below-average** household income
- **Culturally diverse** with a strong presence within Black Community



### What do they like to do?\*

- Film Festivals
- Horse Racing
- Historical Sites
- Concerts-Casinos and Halls
- Theatre-Community Theatre



### Platforms & Advertisement Channels?\*

- Radio: Sports
- TV: Morning Local News
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Canadian Living
- Internet: Light Users (0-2 hrs/day)
- Social Media: Facebook



### How do they think?\*

- Need for Escape
- Trust Small Business
- Utilitarian Consumerism
- Guided by Reason and Logic
- Technology Anxiety



### Find out where they live\*\*

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



# MUSEUMS & HERITAGE SITES, SCIENCE & EDUCATION

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

Indigenous older couples living in rural areas



### Who are they?\*

- **Trades** or **College** Certificate
- **Blue-collar**
- **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
- National or Provincial Parks
- Theatre and Concerts-Variety Venues
- Home Shows
- Skiing-Cross Country and Downhill
- Hiking/Backpacking



### Platforms & Advertisement Channels?\*

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



### How do they think?\*

- Enjoy Being One with Nature
- Open to Diverse Cultures
- Trust Small Business
- Support Community
- Utilitarian Consumerism



### Find out where they live\*\*

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

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