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
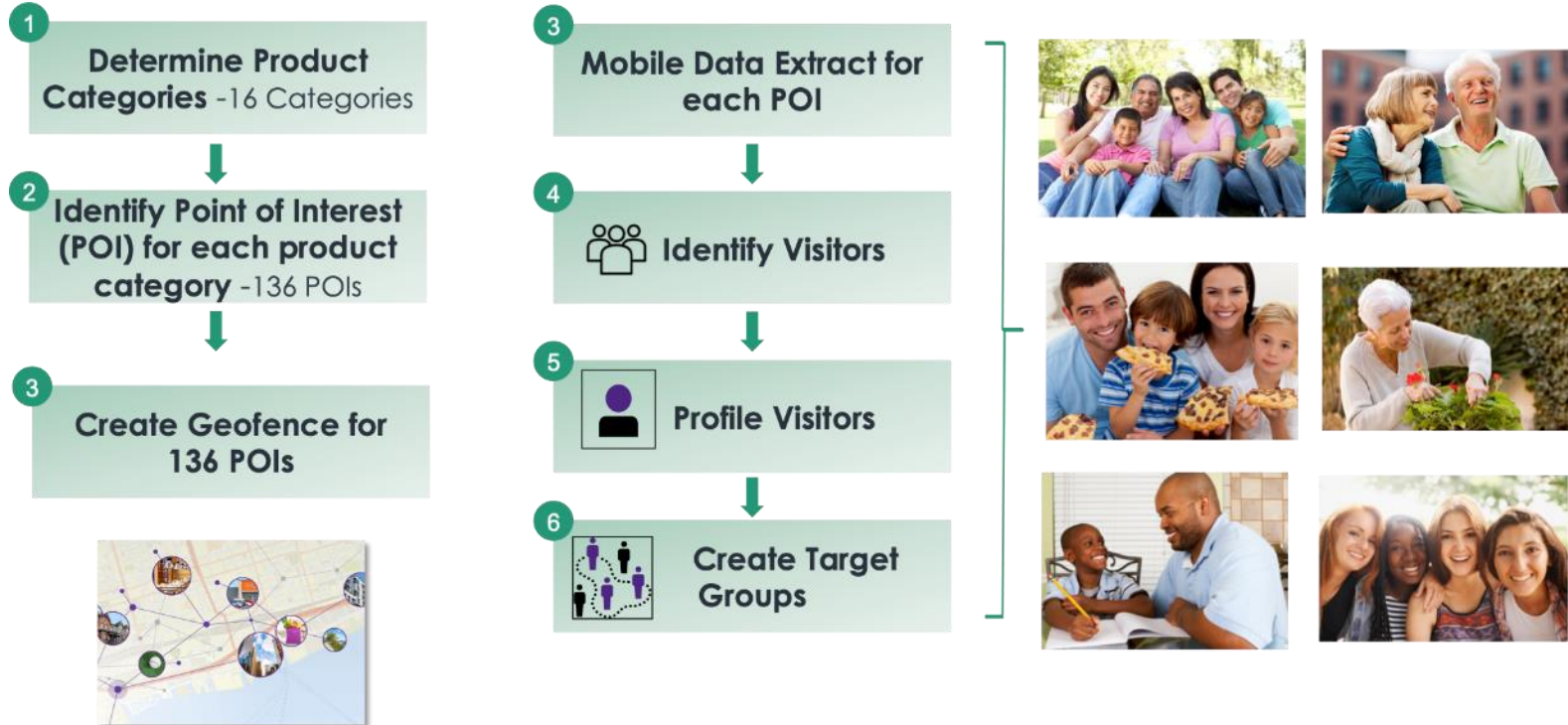
WHAT IS NOT INCLUDED

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:

1. **Determine Product Categories** -16 Categories

2. **Identify Point of Interest (POI) for each product category** -136 POIs

3. **Create Geofence for 136 POIs**

3. **Mobile Data Extract for each POI**

4. **Identify Visitors**

5. **Profile Visitors**

6. **Create Target Groups**

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

OPERA, BALLET & SYMPHONY SUMMARY

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OPERA, BALLET & SYMPHONY: NON-LOCAL VISITORS

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OPERA, BALLET & SYMPHONY LOCAL VISITORS' SUMMARY

		Who are they?		Market Size		Where do they visit?		
						Community Attractions		
Please refer to each Target Group profile for full detail		**Target Group Description**		Count*	% of Total	**Visitor Behaviour**		**Local Visitors for Major Attractions**
						Comp%	Index	
LOCAL TARGET GROUPS	**TG1**	**Wealthy middle-aged urban families living in single-detached homes.** These university-educated households earn well-above-average incomes working in white-collar occupations.		406K	7.6%	11.3%	150	◎
	TG2	**Diverse younger to middle-aged urban singles living in rented apartments.** These university-educated individuals work in white-collar occupations and earn slightly below-average incomes.		736K	13.7%	28.6%	209	◎

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

OPERA, BALLET & SYMPHONY BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Wealthy middle-aged urban families living in single-detached homes

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
- Film Festivals
- Art Galleries/Museums
- Theatre and Concerts-Various Venues
- Skiing-Downhill and Cross Country
- Marathon

Platforms & Advertisement Channels?*

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

How do they think?*

- Open to Learn from Diversity
- Want Control
- Skeptical of Small Business
- Ecological Lifestyle
- Spontaneous

Find out where they live**

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

*Chosen from index ranking with minimum 5% composition
** Ranked by count of total household pop 15+ in Ontario

OPERA, BALLET & SYMPHONY BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse younger to middle-aged 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
- Dancing/Night Clubs
- Theatre and Concerts-Various Venues
- Health Club Activity
- Billiards/Pool

Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, Alternative Rock
- Newspaper: The Globe and Mail
- TV: Tennis, Sci-Fi Shows
- 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
- Pursuit of Originality
- Committed to Health

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OPERA, BALLET & SYMPHONY : NON-LOCAL VISITORS

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OPERA, BALLET & SYMPHONY NON-LOCAL VISITORS' SUMMARY

		Who are they?		Market Size		Where do they visit?		
						Attractions		
Please refer to each Target Group profile for full detail		**Target Group Description**		Count	% of Total	**Visitor Behaviour**		**Non-Local Visitors for Major Attractions**
						Comp%	Index	
NON-LOCAL TARGET GROUPS	**TG 1**	**Upscale diverse middle-aged suburban families.** These university-educated households earn well-above-average incomes, working in white-collar occupations.		632K	9.2%	17.5%	190	
	TG 2	**Upscale mature urban families with adult children at home.** They are likely to hold university degrees and work in white-collar occupations with well-above-average incomes.		1.0M	14.7%	20.3%	138	
	TG 3	**Middle-aged suburban families living in single-detached houses.** Likely to hold trades/college certificates, these individuals tend to work in management or trades sectors and earn above-average incomes.		1.1M	16.4%	21.6%	132	

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

OPERA, BALLET & SYMPHONY BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Upscale diverse middle-aged 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?*

- Theme Parks
- Zoos/Aquariums
- Specialty Movie Theatres
- Hockey
- Jogging
- Basketball

Platforms & Advertisement Channels?*

- Radio: Mainstream Top 40, Sports, All News
- TV: Children's Programs, Basketball
- Internet: Heavy Users (3+ hrs/day)
- Social Media: Instagram, LinkedIn, Twitter, Snapchat

How do they think?*

- Risk Taker
- Optimistic
- Family First
- Trust Advertising
- Ostentatious Consumption

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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OPERA, BALLET & SYMPHONY BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Upscale mature 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
- Music Festivals
- Popular Music/Rock Concerts
- Theatre-Various Venues
- Concerts-Theatres/Halls
- Skiing-Downhill

Platforms & Advertisement Channels?*

- Radio: Classic/Fine Arts, News/Talk, Sports
- TV: Soccer, Tennis, NFL
- Newspaper: The Globe and Mail,
- Internet: Moderate Users (2-3 hrs/day)
- Social Media: YouTube, Facebook

How do they think?*

- Open to Learn from Diversity
- Want Control
- Interest in Diversity
- Ecological Concern
- Ostentatious Consumption

Find out where they live**

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OPERA, BALLET & SYMPHONY BEST **NON-LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Middle-aged suburban families living in single-detached houses

Who are they?*

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

- **White-** or **Blue-collar**

- **Above-average** household income

- **Less likely** to be culturally diverse

What do they like to do?*

- Sporting and Racing Events
- National and Provincial Park
- Home and Craft Shows
- Theatres-Community Theatre
- Skiing-Cross Country
- Golfing

Platforms & Advertisement Channels?*

- Radio: Today's Country, Mainstream Rock
- TV: Golf, Auto Racing, CFL
- Newspaper: National Post, Community
- 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
- Flexible Definition Families

Find out where they live**

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

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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

Benchmark: Ontario