

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

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

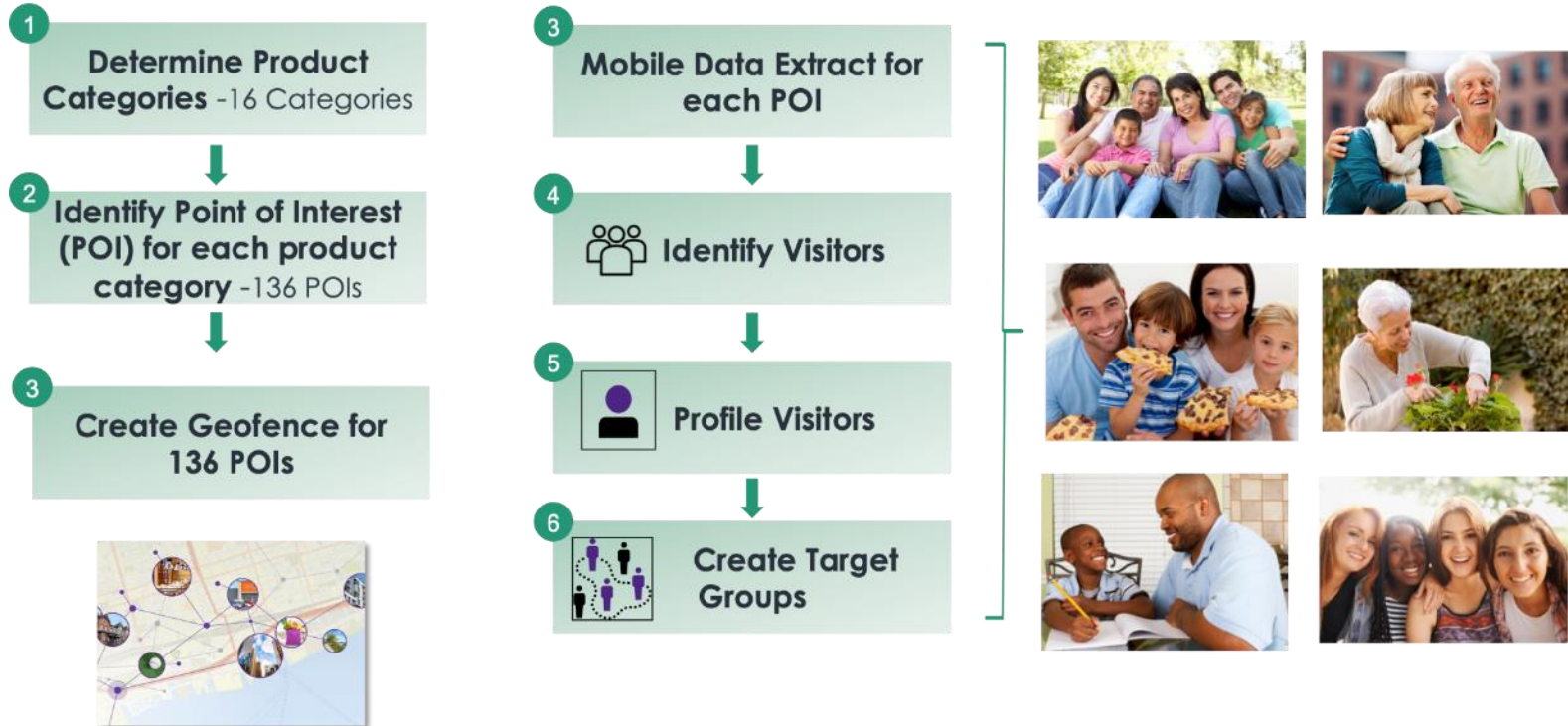
Some product categories were not included as they were too difficult to analyze:

- 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

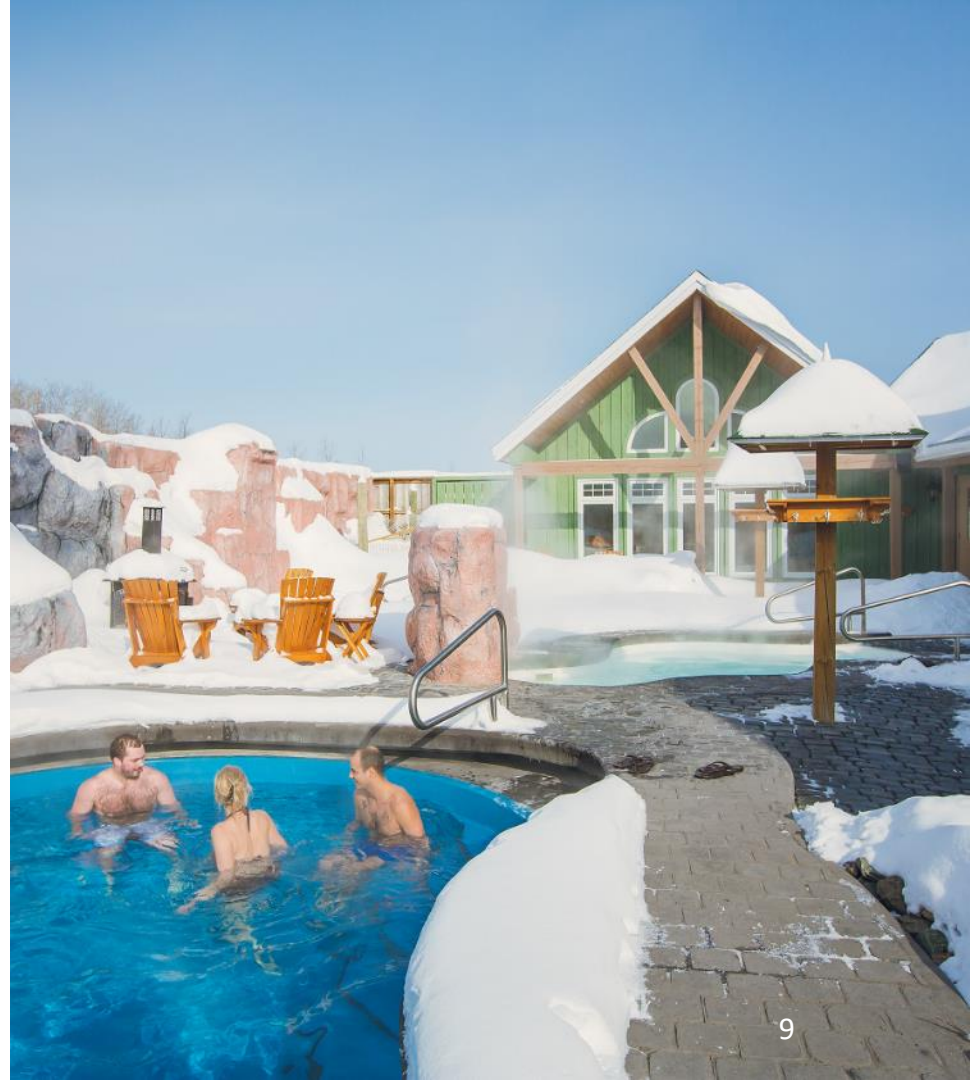
Using privacy compliant mobility app-based data (MobileScapes) and syndicated survey data (Numeris), EA identified Destination Ontario visitors by experience/product and overlaid consumer segments (PRIZM) to create key Visitor target groups.

| | 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 |

RESORTS SUMMARY





RESORTS: LOCAL VISITORS

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RESORTS LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

| LOCAL TARGET GROUPS | | Who are they?* | Market Size | | Where do they visit? | | |
|---------------------|-----|---|-------------|------------|-----------------------|-------|---|
| | | | | | Community Attractions | | |
| | | Target Group Description | Count | % of Total | Visitor Behaviour | | Local Visitors for Community Attractions |
| | | | | | Comp% | Index | |
| | TG1 | Older to mature suburban and rural empty-nesters living in single-detached houses. They are likely to be retired and live off their below-average household incomes. | 304K | 13.7% | 19.0% | 139 |  |
| | TG2 | Older rural couples and families living in single-detached homes. They utilize their trades or college certificates by working in management or trades sectors, earning above-average household incomes. | 252K | 11.3% | 15.7% | 139 |  |
| | TG3 | Middle-aged suburban families living with their school-aged children. They are likely to utilize their trades or college educations in blue-collar occupations, earning above-average household incomes. | 259K | 11.6% | 15.5% | 133 |  |
| | TG4 | Older to mature urban empty-nesters with modest income. They are likely to hold high school or trades diplomas working in blue-collar occupations. | 130K | 5.8% | 8.0% | 136 |  |

RESORTS BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban and rural empty-nesters living in single-detached houses



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
- Parks/City Gardens
- Home and Craft Shows
- Theatre and Concerts-Variety Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing



Platforms & Advertisement Channels?*

- Radio: Classic and Today's Country
- Newspaper: Community Newspaper
- TV: Curling, Figure Skating, CFL
- Magazine: CAA Magazine, Canadian Living
- Internet: Moderate Users (0-4 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**

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

RESORTS BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older rural couples and families living in single-detached homes



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
- National or Provincial Park
- Theatre and Concerts-Variety Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing
- Skiing-Cross Country



Platforms & Advertisement Channels?*

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



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Want Control
- Discriminating Consumerism
- Trust Small Business



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RESORTS BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Middle-aged suburban families living with their school-aged children



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
- Parks/City Gardens
- Home and Craft Shows
- Theatre–Community Theatre
- ATV/Snowmobiling
- Golfing



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Want Control
- Flexible Definition Families
- Technology Anxiety
- Prefer Ethical Companies



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RESORTS BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature urban empty-nesters with modest income



Who are they?*

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



What do they like to do?*

- Carnivals/Fairs
- Parks/City Gardens
- Sporting Events
- Home and Craft Shows
- Theatre and Concerts–Various Venues
- Fishing/Hunting



Platforms & Advertisement Channels?*

- Radio: Today's Country, Mainstream Rock
- Newspaper: Community Newspaper
- TV: CFL, Auto Racing, Golf, NFL
- Internet: Light Users (0–2 hrs/day)
- Social Media: Pinterest



How do they think?*

- Need for Escape
- Want Control
- Prefer Ethical Companies
- Flexible Definition Families
- Technology Anxiety



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RESORTS: NON-LOCAL VISITORS

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RESORTS 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 | | |
| | | Count | % of Total | Visitor Behaviour | | Non-Local Visitors for Community Attractions |
| | Target Group Description | | | Comp% | Index | |
| NON-LOCAL TARGET GROUPS | TG1 Older to mature urban wealthy families living with adult children. These well-educated households earn well-above-average incomes via white-collar occupations. | 572K | 5.7% | 9.8% | 172 |  |
| | TG2 Diverse middle-aged suburban families with school-aged children living in detached houses. They utilize their university educations in white-collar jobs and earn above-average incomes. | 1.0M | 10.4% | 15.8% | 152 |  |
| | TG3 Diverse middle-aged urban fringe families living with adult children. These university educated diverse households earn above-average incomes via white-collar jobs. | 891K | 8.9% | 12.3% | 138 |  |
| | TG4 Middle-aged suburban families with teenagers. They are more likely to hold trades or college certificates and work in white- or blue-collar jobs, earning above-average income. | 763K | 7.6% | 10.9% | 144 |  |
| | TG5 Older to mature suburban empty-nesters. These retired individuals are more like to hold trades or college certificates and earn incomes on par with the market average. | 458K | 4.6% | 5.3% | 115 |  |

RESORTS BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature urban wealthy 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?*

- Theme Parks
- Ballet/Opera/Symphony
- Theatre and Concerts-Variety Venues
- Skiing-Downhill and Cross Country
- Hockey
- Whale Watching



How do they think?*

- Open to Learn from Diversity
- Canada a 'Land of Opportunity'
- Want Control
- Values Authentic Brands
- Skeptical of Small Business



Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, News/Talk
- TV: Sports Games, Evening Local News
- Magazine: People, Zoomer Magazine
- Newspaper: The Globe and Mail, National Post
- Internet: Moderate Users (2-4 hrs/day)
- Social Media: Snapchat, Pinterest



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RESORTS BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Diverse middle-aged suburban families with school-aged children living in detached houses



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
- Visiting Professional Sports–Soccer and Basketball
- Hockey



How do they think?*

- Canada a 'Land of Opportunity'
- Risk Taker
- Family First
- Trust Advertising
- Ostentatious Consumption



Platforms & Advertisement Channels?*

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



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RESORTS BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Diverse middle-aged urban fringe families living with adult children



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?*

- Theme Parks
- Ballet/Opera/Symphony
- Film Festivals
- Theatre-Various Venues
- Marathon
- Skiing-Downhill



Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, All News, Sports
- TV: Soccer, Basketball
- Internet: Heavy Users (3+ hrs/day)
- Social Media: Instagram, LinkedIn, Twitter



How do they think?*

- Ostentatious Consumption
- Need for Status Recognition
- Traditional Family
- Informed Purchasing
- Prefer Looks over Function



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RESORTS BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Middle-aged suburban families with teenagers



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 or Provincial Parks
- Theatre-Community Theatre
- Concerts-Casinos
- ATV/Snowmobiling
- Power boating/Jet Skiing



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Enjoy Being One with Nature
- Technology Anxiety
- Guided by Reason and Logic
- Want Control



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RESORTS BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban empty-nesters



Who are they?*

- **Trades** or **College** Certificate
- **Retired**
- **Average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Sporting and Racing Events
- Parks/City Gardens
- Theatre and Concerts-Variety Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing
- Skiing-Cross Country



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Sports Games, Home Reno Shows
- Magazine: CAA Magazine, Canadian Living
- Newspaper: Community Newspaper
- Internet: Light Users (0-1 hr/day)
- Social Media: Pinterest



How do they think?*

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



Find out where they live**

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A person is kayaking on a calm body of water during a vibrant sunset. The sky is filled with dramatic, colorful clouds in shades of orange, red, and purple. In the distance, a city skyline is visible on the horizon. The overall scene is peaceful and scenic.

THANK YOU

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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