TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

February 24, 2022

Tobermory, 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
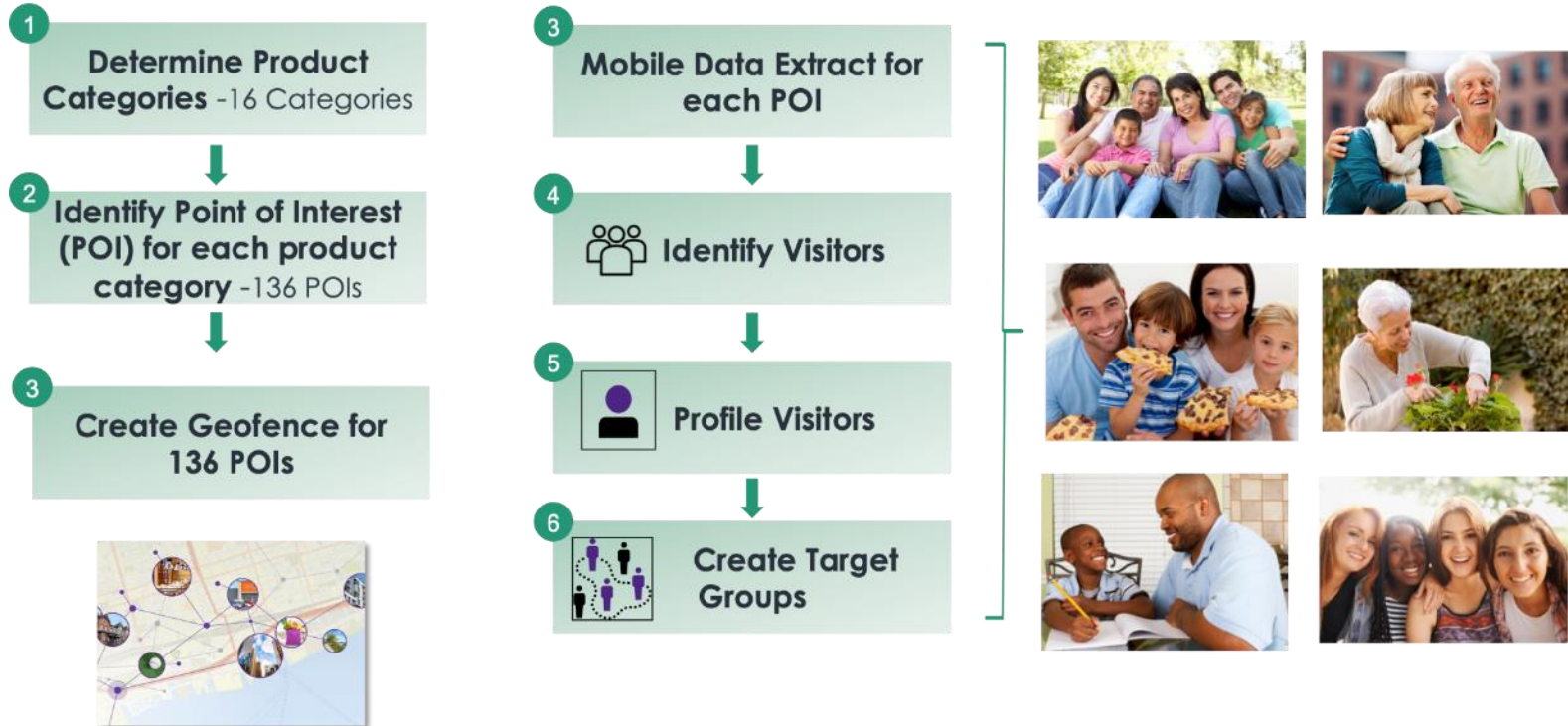
WHAT IS NOT INCLUDED

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**
4. **Mobile Data Extract for each POI**
5. **Identify Visitors**
6. **Profile Visitors**
7. **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. Theatre & Film
2. Musuems, 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 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

Sources: PRIZM, MobileScapes , Numeris, DemoStats

SPAS & RETREATS SUMMARY

ENVIRONICS
ANALYTICS

DESTINATION
ONTARIO

SPAS AND RETREATS: LOCAL VISITORS

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SPAS AND RETREATS LOCAL VISITORS' SUMMARY

Who are they?*		Where do they visit?									
		Major Attractions					**Community Attractions**				
	Target Group Description	**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	
TG 1	**Younger urban singles living in rented low–rise.** These young urbanites have modest education and earn below–average income via grey–collar jobs.	482K	6.6%	10.3%	156		97K	5.3%	9.7%	185	
TG 2	**Diverse younger urban singles living in rented high–rise apartments.** These individuals utilize their university education in white–collar occupations and earn a below–average income.	702K	9.6%	20.8%	218		22K	1.2%	0.8%	64	
TG 3	**Older to mature urban families living with adult children.** They are likely to hold university degrees and earn above–average incomes via white–collar jobs.	756K	10.3%	12.8%	124		72K	3.9%	3.7%	94	
TG 4	**Diverse middle–aged urban fringe families with young children.** These households are likely to have university educations and work in white–collar occupations taking home above–average incomes.	1.1M	15.0%	19.0%	127		115K	6.2%	3.0%	48	
TG 5	**Older to mature suburban singles and couples living in single–detached houses.** These households are likely to be retired and earn below–average incomes.	194K	2.6%	3.7%	139		332K	18.0%	36.8%	205	
TG 6	**Older rural empty–nesters living in their single–detached houses.** They are likely to hold trades or college certificates and work in blue–collar occupations earning average household incomes.	330K	4,5%	4.4%	97		310K	16.8%	27.7%	165	

Please refer to each Target Group profile for full detail

LOCAL TARGET GROUPS

Source: PRIZM, MobileScapes, DemoStats
Benchmark: Ontario for DemoStats & *Local–Major Attraction Market, **Local–Community Market for MobileScapes

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

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SPAS AND RETREATS BEST **LOCAL** MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Younger urban singles living in rented low–rise

Who are they?*

- **No Certificate/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
- Concerts–Various Venues
- Dancing/Night Clubs
- Theatre–Community Theatre
- Martial Arts

Platforms & Advertisement Channels?*

- Radio: Multi/Variety/Specialty
- TV: Sci–Fi Shows, Daytime Soaps
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: Facebook

How do they think?*

- Accept Ethnic Diversity within Families
- Interest in Diversity
- Prefer Ethical Companies
- Financial Concern Regarding the Future
- Want to Protect Environment

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

SPAS AND RETREATS BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse younger urban singles living in rented high–rise apartments

Who are they?*

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

What do they like to do?*

- Film Festivals
- Comedy Clubs/Shows
- Ballet/Opera/Symphony
- Theatre and Concerts–Various Venues
- Adventure Sports
- Billiards/Pool

Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, News/Talk
- TV: Tennis, Sci–Fi Shows
- Newspaper: The Globe and Mail, National Post
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, Twitter, YouTube

How do they think?*

- Open to Learn from Diversity
- Ecological Concern
- Interest in Diversity
- Committed to Health
- Interest Based Buying

Find out where they live**

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SPAS AND RETREATS BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Older to mature urban families living with adult children

Who are they?*

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

What do they like to do?*

- Ballet/Opera/Symphony
- Theatres– Various Venues
- Concerts–Outdoor Stages and Halls
- Craft Shows
- Whale Watching

Platforms & Advertisement Channels?*

- Radio: News/Talk, Multi/Variety/Specialty
- TV: Golf, NFL, CFL, Curling, Figure Skating
- Newspaper: The Globe and Mail, Community
- Internet: Moderate Users (2–3 hrs/day)
- Social Media: Pinterest, Snapchat

How do they think?*

- Open to Learn from Diversity
- Wants to Leave a Legacy
- Questions Authority
- Guided by Reason and Logic
- Want Control

Find out where they live**

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SPAS AND RETREATS BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse middle–aged urban fringe families with young children

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?*

- Ballet/Opera/Symphony
- Popular Music/Rock Concerts
- Indoor Amusement Centres
- Concerts and Theatres
- Playing Video Games
- Health Club Activity

Platforms & Advertisement Channels?*

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

How do they think?*

- Accept Ethnic Diversity within Families
- Prefer Looks over Function
- Price Matters
- Canada a 'Land of Opportunity'
- Open to Learn from Diversity

Find out where they live**

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SPAS AND RETREATS BEST **LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban singles and couples living in single–detached houses

Who are they?*

- **Trades** or **College** Certificate
- **Retired**
- **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–Various Venues
- ATV/Snowmobiling
- Powerboating/Jet Skiing

Platforms & Advertisement Channels?*

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

How do they think?*

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

Find out where they live**

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

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SPAS AND RETREATS BEST **LOCAL** MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older rural empty–nesters living in their 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
- Home and Craft Shows
- National or Provincial Parks
- Theatres–Community and Festivals
- ATV/Snowmobiling
- Powerboating/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?*

- Want Control
- Enjoy Being One with Nature
- Trust Small Business
- Need for Escape
- Technology Anxiety

Find out where they live**

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

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SPAS AND RETREATS : NON–LOCAL VISITORS

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SPAS AND RETREATS NON–LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

NON–LOCAL TARGET GROUPS

	Who are they?*	Market Size		Where do they visit?					
				Major Attractions			Community Attractions		
	Target Group Description	Count	% of Total	Visitor Behaviour		Non–Local Visitors for Major Attractions	Visitor Behaviour		Non–Local Visitors for Community Attractions
				Comp%	Index		Comp%	Index	
TG1	**Middle–aged to older suburban families with school–aged children.** These households are more likely to hold trades or college certificates and earn above–average incomes working in management or trades sectors.	698K	16.8%	22.3%	133	🎯	30.9%	184	🎯
TG2	**Upscale diverse suburban middle–aged to older families.** These upscale families utilize their university education in white–collar occupations and earn above–average household incomes.	356K	8.6%	11.9%	139	🎯	14.6%	170	🎯
TG3	**Older to mature rural empty–nesters living in their single–detached houses.** These households are more likely to work in the trades sector and earn household incomes on par with the market average.	450K	10.8%	15.7%	145	🎯	4.7%	43	
TG4	**Affluent mature urban families with children.** They utilize their university education in management, sciences and education sectors.	422K	10.2%	8.7%	85		15.9%	157	🎯

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

SPAS AND RETREATS BEST **NON–LOCAL** MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Middle–aged to older suburban families with school–aged children

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
- Home and Craft Shows
- Theatre–Community Theatre
- Concerts–Casinos
- ATV/Snowmobiling

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?*

- Enjoy Being One with Nature
- Need for Escape
- Accept Ethnic Diversity within Families
- Technology Anxiety
- Trust Small Business

Find out where they live**

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

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** Ranked by count of total household pop 15+ in Ontario

SPAS AND RETREATS BEST **NON–LOCAL** MARKET POTENTIAL
FOR MAJOR AND COMMUNITY ATTRACTIONS

Upscale diverse suburban middle–aged to older 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
- Popular Music/Rock Concerts
- Indoor Amusement Centres
- Basketball
- Adventure Sports
- Hockey

Platforms & Advertisement Channels?*

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

How do they think?*

- Canada a 'Land of Opportunity'
- Ostentatious Consumption
- Feel Secure about Financial Future
- Show off via their Home
- Need for Escape

Find out where they live**

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SPAS AND RETREATS BEST **NON–LOCAL** MARKET POTENTIAL
FOR MAJOR ATTRACTIONS

Older to mature rural empty–nesters living in their single–detached houses

Who are they?*

- **Trades** 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
- Theatre–Various Venues
- Concerts–Outdoor Stages
- ATV/Snowmobiling
- Power Boating/Jet Skiing

Platforms & Advertisement Channels?*

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

How do they think?*

- Enjoy Being One with Nature
- Guided by Reason and Logic
- Utilitarian Consumerism
- 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

Source: PRIZM, MobileScapes, DemoStats, SocialValues, Numeris
Benchmark: Ontario for DemoStats, Numeris & Canada for SocialValues

* Chosen from index ranking with minimum 5% composition   21
** Ranked by count of total household pop 15+ in Ontario

SPAS AND RETREATS BEST **NON–LOCAL** MARKET POTENTIAL
FOR COMMUNITY ATTRACTIONS

Affluent mature urban families with children

Who are they?*

- **Well–educated**

- **White–collar**

- **Above–average** household income

- **Less likely** to be culturally diverse

What do they like to do?*

- Parks/City Gardens
- Specialty Movie Theatres
- Theatre–Festivals
- Concert–Outdoor Stages
- Gardening
- Fitness Walking

Platforms & Advertisement Channels?*

- Radio: Sports, Mainstream Top 40
- TV: NFL, Golf, Tennis, Basketball
- Newspaper: The Globe and Mail
- Internet: Moderate Users (2–3 hrs/day)
- Social Media: Pinterest

How do they think?*

- Open to Learn from Diversity
- Canada a 'Land of Opportunity'
- Pursuit of Originality
- Enjoy Crowds
- Support Community

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

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