TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

March 3, 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
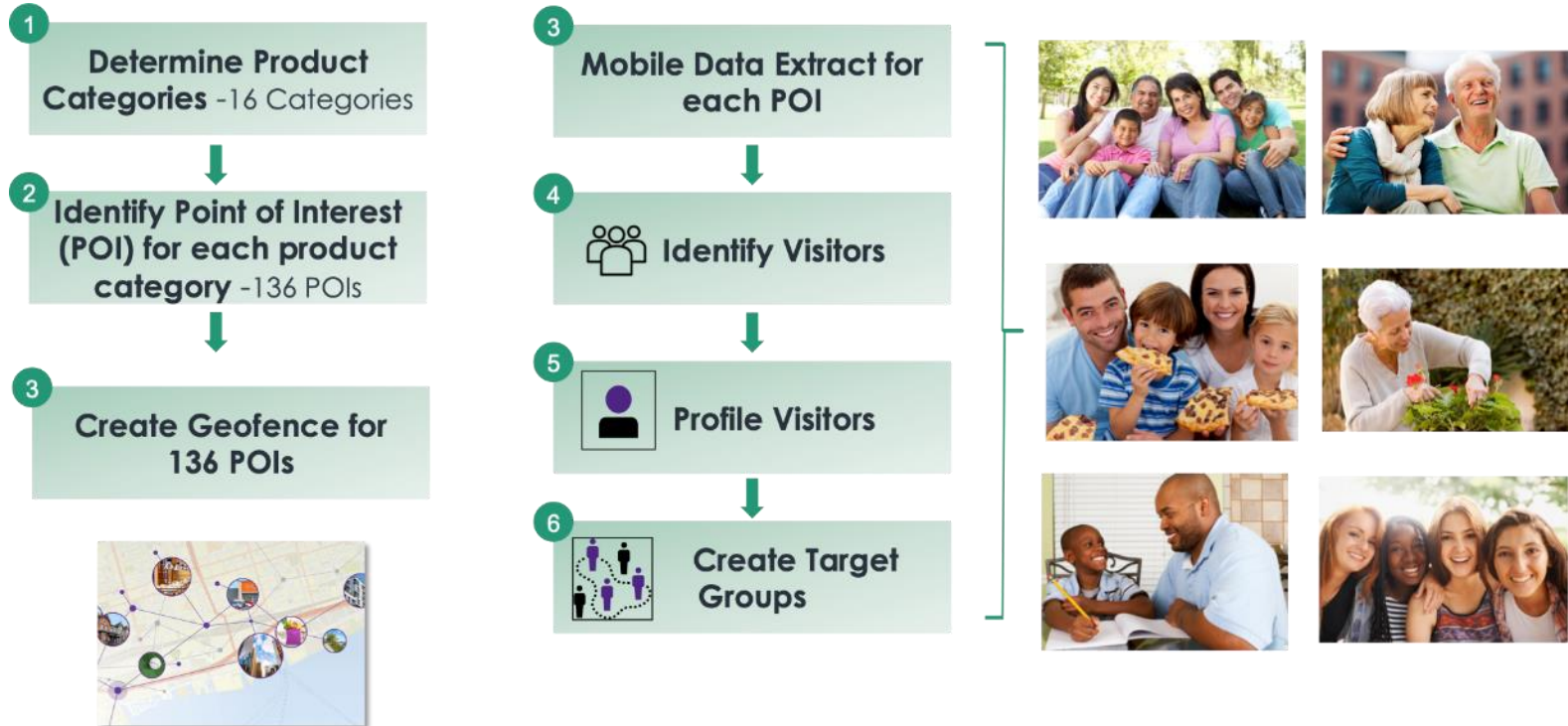
WHAT IS NOT INCLUDED

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**

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
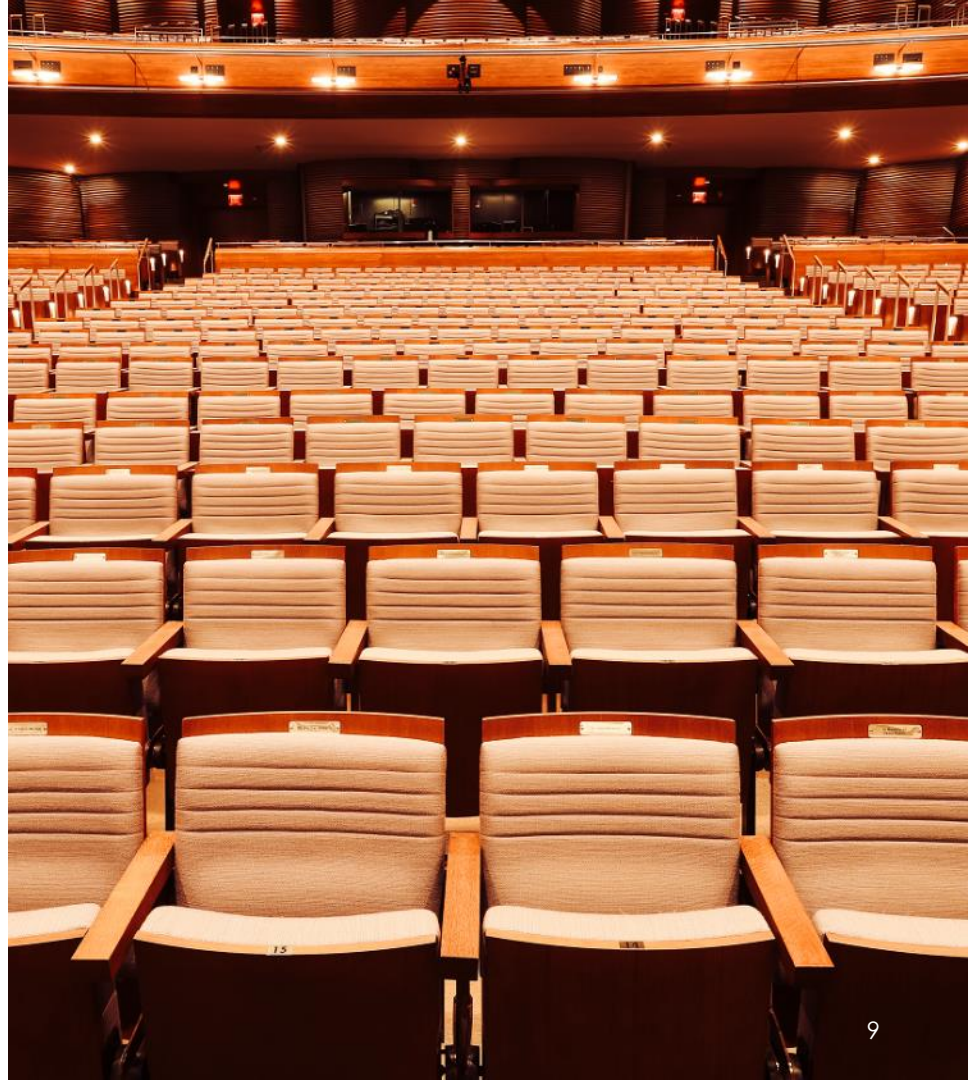7. Farmers' Markets
8. Wine Regions

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

THEATRE & FILM SUMMARY

ENVIRONICS
ANALYTICS

DESTINATION
ONTARIO

THEATRE & FILM: LOCAL VISITORS

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THEATRE & FILM LOCAL VISITORS' SUMMARY

	Who are they?						Where do they visit?					
							Major Attractions					
		Target Group Description	**Market Size**		**Visitor Behaviour**		**Local Visitors for Major Attractions**	**Market Size**		**Visitor Behaviour**		**Local Visitors for Community Attractions**
Please refer to each Target Group profile for full detail			Count*	% of Total	Comp%	Index		Count**	% of Total	Comp%	Index	
	TG1	**Wealthy older to mature urban families living with adult children.** These university-educated households work in white-collar jobs and earn well-above-average household incomes.	851K	9.7%	11.3%	117	🎯	36K	7.9%	7.7%	98	🎯
	TG2	**Younger to middle-aged urban singles living in rented apartments.** These households tend to be university-educated and earn below-average incomes via white-and grey-collar jobs.	1.2M	13.1%	20.3%	155	🎯	54K	11.8%	4.8%	41	
	TG3	**Diverse middle-aged to older urban upscale families living with adult children at home.** They hold university diplomas and earn above-average incomes via white-collar jobs.	549K	6.2%	8.2%	132	🎯	38K	8.3%	4.5%	54	
	TG4	**Older to mature suburban singles and couples living in single-detached houses.** They are likely to be retired and with slightly below-average household incomes.	508K	5.8%	7.3%	127	🎯	125K	27.2%	50.8%	187	🎯
	TG5	**Upscale middle-aged to older suburban families living in single-detached houses.** They are likely to hold trades or college certificates and earn well-above-average household incomes via white- and blue-collar jobs.	655K	7.4%	7.3%	98		29K	6.3%	13.0%	207	🎯

LOCAL TARGET GROUPS (vertical label, Community Attractions spans the right-hand "Where do they visit?" header)

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

THEATRE & FILM BEST **LOCAL** MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Wealthy older to mature 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
- Theatre-Various Venues
- Concerts-Outdoor Stages
- Craft Shows
- Curling

Platforms & Advertisement Channels?*

- Radio: News/Talk, All News, Sports
- TV: Golf, NFL, Soccer, Baseball
- Newspaper: The Globe and Mail
- Internet: Moderate Users (2-3 hrs/day)
- Social Media: Snapchat, Pinterest

How do they think?*

- Open to Learn from Diversity
- Want Control
- Canada a 'Land of Opportunity'
- Interest Based Buying
- Value Authentic Brands

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

THEATRE & FILM BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Younger to middle-aged urban singles living in rented apartments

Who are they?*

- **Well-educated**

- **White-** or **Grey-collar**

- **Below-average** household income

- **Less likely** to be culturally diverse

What do they like to do?*

- Film and Music Festivals
- Theatre and Concerts-Various Venues
- Dancing/Night Clubs
- Comedy Clubs/Shows
- Martial Arts
- Billiards/Pool

Platforms & Advertisement Channels?*

- Radio: Modern/Alternative Rock, News/Talk
- TV: Tennis, Sci-Fi/Fantasy Shows
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, YouTube

How do they think?*

- Open to Learn from Diversity
- Accept Ethnic Diversity within Families
- Interest in Diversity
- Ecological Concern
- Optimistic

Find out where they live**

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THEATRE & FILM BEST LOCAL MARKET POTENTIAL FOR MAJOR ATTRACTIONS

Diverse middle-aged to older urban upscale families living with adult children at home

Who are they?*

- **Well-educated**

- **White-collar**

- **Above-average** household incomes

- **Culturally diverse** with a strong presence within Chinese Community

What do they like to do?*

- Ballet/Opera/Symphony
- Film Festivals
- Theatre-Various Venues
- Visiting Professional Sports-Basketball
- Martial Arts
- Racquet Sports

Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, All News
- TV: Soccer, Cartoons, Tennis
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn

How do they think?*

- Trust Big Business
- Open to Learn from Diversity
- Prefer Looks over Function
- Skeptical of Small Business
- Enjoy Advertising

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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THEATRE & FILM BEST LOCAL MARKET POTENTIAL
FOR MAJOR AND COMMUNITY ATTRACTIONS

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

Who are they?*

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

- **Retired**

- **Slightly 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
- Power Boating/Jet Skiing

Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Curling, Figure Skating, CFL, Golf
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Mclean's
- Internet: Light to Moderate Users (0-3 hrs/day)
- Social Media: Pinterest

How do they think?*

- Utilitarian Consumerism
- Enjoy Being One with Nature
- Financial Concern Regarding the Future
- Proud Canadian
- 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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THEATRE & FILM BEST LOCAL MARKET POTENTIAL
FOR COMMUNITY ATTRACTIONS

Upscale middle-aged to older suburban families living in single-detached houses

Who are they?*

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

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

- **Well-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 Theatres
- ATV/Snowmobiling
- Fishing/Hunting

Platforms & Advertisement Channels?*

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

How do they think?*

- Want Control
- Accept Ethnic Diversity within Families
- Need for Escape
- Proud Canadian
- Want to Leave a Legacy

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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THEATRE & FILM: NON-LOCAL VISITORS

THEATRE & FILM 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	
TG 1	**Upscale middle-aged to older suburban families.** They are likely to hold college diplomas and work in white-collar occupations.	607K	16.8%	23.5%	139	🎯	24.2%	144	🎯
TG 2	**Diverse, upscale middle-aged suburban families.** These university-educated households earn well-above-average household incomes working in white-collar occupations.	185K	5.1%	7.1%	139	🎯	9.2%	179	🎯
TG 3	**Retired older to mature rural singles and couples with below-average incomes.** They are likely to be retired with below-average household incomes.	410K	11.4%	13.4%	118	🎯	14.0%	123	🎯
TG 4	**Older to mature suburban empty-nesters with average incomes**. They work in blue-collar jobs and earn household incomes on par with the market average.	737K	20.4%	19.7%	94	🎯	27.5%	135	🎯

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

THEATRE & FILM BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Upscale middle-aged to older suburban families

Who are they?*

- **College** Diploma
- **White-collar**
- **Well-above-average** household income
- **Less likely** to be culturally diverse

What do they like to do?*

- Sporting and Racing Events
- Craft Shows
- National or Provincial Parks
- Theatre-Community Theatre
- Golfing
- Skiing-Cross Country

Platforms & Advertisement Channels?*

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

How do they think?*

- Need for Escape
- Open to Learn from Diversity
- Accept Ethnic Diversity within Families
- Want Control
- Proud Canadian

Find out where they live**

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THEATRE & FILM BEST NON-LOCAL MARKET POTENTIAL
FOR MAJOR AND COMMUNITY ATTRACTIONS

Diverse, upscale 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 and Chinese Communities

What do they like to do?*

- Theme Parks
- Indoor Amusement Centers
- Zoos/Aquariums
- Basketball
- Hockey
- Adventure Sports

Platforms & Advertisement Channels?*

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

How do they think?*

- Ostentatious Consumption
- Risk Taker
- Trust Advertising
- Brand Matters
- Feel Secure about Financial Future

Find out where they live**

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THEATRE & FILM BEST NON-LOCAL MARKET POTENTIAL FOR MAJOR AND COMMUNITY ATTRACTIONS

Retired older to mature rural singles and couples with below-average incomes

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
- Garden, Craft and Home Shows
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing
- Fishing and Hunting

Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Country
- TV: Home Reno and Daytime Talk Shows
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Mclean's
- Internet: Light Users (0-2 hrs/day)
- Social Media: Pinterest

How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Financial Concern Regarding the Future
- Distrusts Advertising
- 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

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THEATRE & FILM BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban empty-nesters with average incomes

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
- Theatre and Concerts-Various Venues
- ATV/Snowmobiling
- Fishing/Hunting
- Power Boating/Jet Skiing

Platforms & Advertisement Channels?*

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

How do they think?*

- Need for Escape
- Guided by Reason and Logic
- Technology Anxiety
- Trust Small Business
- Proud Canadian

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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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