

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 and slightly to the right. The lighting is bright, coming from the opening in the ice, creating a dramatic effect.

TARGET AUDIENCE BY TOURISM PRODUCTS

TOURISM PRODUCT REPORT

March 3, 2022

Tobermory, Ontario

ENVIRONICS
ANALYTICS

An Agency of the Government of Ontario

The information contained in these documents is confidential, privileged and only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of Destination Ontario.

**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

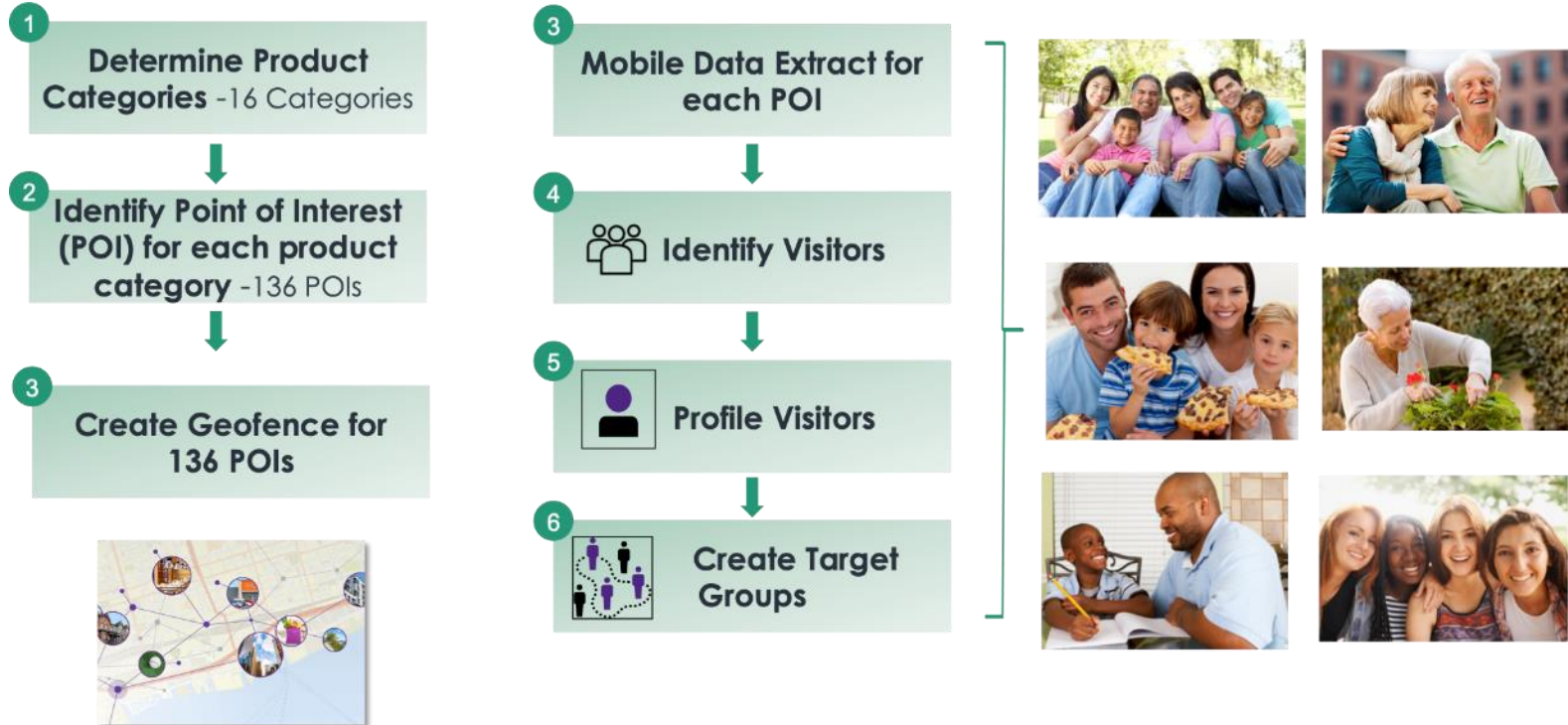
Some product categories were not included as they were too difficult to analyze:

- 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

WINE REGIONS SUMMARY

WINE REGIONS : LOCAL VISITORS









The information contained in these documents is confidential, privileged and only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of Destination Ontario.



WINE REGIONS LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

LOCAL TARGET GROUPS

Who are they?		Where do they visit?														
		Prince Edward County Wineries					Southwest of London Wineries					Niagara Wineries				
Target Group Description	Market Size		Visitor Behaviour		Local Visitors for Prince Edward County	Market Size		Visitor Behaviour		Local Visitors for Southwest of London	Market Size		Visitor Behaviour		Local Visitors for Niagara	
	Count*	% of Total	Comp%	Index		Count*	% of Total	Comp%	Index		Count*	% of Total	Comp%	Index		
Mature suburban couples with average incomes. They hold trades or college educations and earn average incomes via blue-collar jobs.		57K	36.9%	53.8%	146		48K	10.0%	19.7%	198		295K	12.1%	26.6%	219	
Older to mature, midscale rural empty-nesters living in older houses. They hold trades or college educations and earn incomes on par with the market average via blue-collar jobs.		61K	39.5%	32.6%	82		150K	30.8%	37.2%	121		315K	13.0%	17.8%	137	
Upscale older suburban families living with adult children at home. University educated working in white-collar occupations.		633	0.4%	1.0%	237		27K	5.6%	8.7%	154		190K	7.8%	5.8%	75	
Older to mature urban couples with below-average incomes. Trades or college educated working in blue-collar occupations and earn below-average household incomes.		8K	4.9%	4.3%	87		113K	23.2%	19.5%	84		402K	16.6%	23.9%	144	

WINE REGIONS BEST LOCAL MARKET POTENTIAL

FOR PRINCE EDWARD, SOUTHWEST OF LONDON, NIAGARA WINERIES

Mature suburban couples 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
- Parks/City Gardens
- Home and Craft Shows
- Theatre and Concerts-Various Venues
- Skiing-Cross Country
- Fishing/Hunting



Platforms & Advertisement Channels?*

- Radio: Today's Country, Mainstream Rock
- TV: Curling, CFL, Daytime Talk Shows
- Newspaper: Community Newspaper
- Internet: Light Users (0-1 hrs/day)
- Social Media: Pinterest, Facebook



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Guided by Reason and Logic
- Need for Escape
- Financial Concern Regarding the Future



Find out where they live**

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

WINE REGIONS BEST LOCAL MARKET POTENTIAL FOR SOUTHWEST OF LONDON, NIAGARA WINERIES

Older to mature, midscale rural empty-nesters with average incomes living in older 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-Various Venues
- Canoeing/Kayaking
- Golfing



Platforms & Advertisement Channels?*

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



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Need for Escape
- Trust Small Business
- Guided by Reason and Logic



Find out where they live**

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

WINE REGIONS BEST LOCAL MARKET POTENTIAL FOR SOUTHWEST OF LONDON

Upscale older suburban families living 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?*

- Sporting and Racing Events
- Theme Parks
- Craft and Auto Shows
- Concerts-Arenas
- Skiing-Downhill and Cross Country
- Hockey



Platforms & Advertisement Channels?*

- Radio: Mainstream Top 40, Sports
- TV: Contest Shows, Situation Comedies
- Internet: Moderate Users (3-4 hrs/day)
- Social Media: Snapchat



How do they think?*

- Want to Leave a Legacy
- Want Control
- Vitality
- Committed to Health
- Canada a 'Land of Opportunity'



Find out where they live**

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

WINE REGIONS BEST LOCAL MARKET POTENTIAL FOR NIAGARA WINERIES

Older to mature urban couples with below-average incomes



Who are they?*

- **Trades** or **College** Certificate
- **Blue-collar**
- **Below-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Parks/City Gardens
- Carnivals/Fairs
- Home and Craft Shows
- Theatre-Community Theatres
- Concerts-Outdoor Stages
- Fishing/Hunting



Platforms & Advertisement Channels?*

- Radio: Classic Rock, Today's Country
- TV: Auto Racing, CFL, Contest Shows
- Newspaper: Community Newspaper
- Internet: Light Users (0-1 hrs/day)
- Social Media: Pinterest



How do they think?*

- Need for Escape
- Want Control
- Technology Anxiety
- Proud Canadian
- Trust Small Business



Find out where they live**

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

WINE REGIONS: NON-LOCAL VISITORS

The information contained in these documents is confidential, privileged and only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of Destination Ontario.



WINE REGIONS NON-LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail

Please refer to each Target Group profile for full detail	Who are they?	Market Size		Where do they visit?									
				Prince Edward County Wineries			Southwest of London Wineries			Niagara Wineries			
				Visitor Behaviour		Non-Local Visitors for Prince Edward County	Visitor Behaviour		Non-Local Visitors for Southwest of London	Visitor Behaviour		Non-Local Visitors for Niagara	
	Count	% of Total	Comp%	Index	Comp%		Index	Comp%		Index			
NON-LOCAL TARGET GROUPS	TG 1	Retired older to mature suburban couples living in suburban areas. They hold trades or college certificates and are likely to be retired with average incomes.	645K	7.0%	12.4%	176		18.8%	267		8.7%	124	
	TG 2	Upscale middle-aged to older suburban families. They have higher educations in white-collar jobs and earn well-above-average incomes.	956K	10.4%	16.8%	161		16.6%	159		14.8%	142	
	TG 3	Older rural empty-nesters living in single-detached houses. They earn household incomes on par with the market average working in the trades sector.	577K	6.3%	8.4%	133		3.4%	55		4.2%	67	
	TG 4	Wealthy older urban families with adult children at home. These university-educated households work in white-collar jobs.	655K	7.2%	12.2%	170		3.2%	45		9.9%	139	
	TG 5	Upscale diverse young urbanites living in rented high-rise apartments. They utilize their university educations working in white-collar jobs.	1.3M	14.0%	16.3%	116		6.4%	46		18.7%	133	
	TG 6	Mature empty-nesters with modest incomes living in mixed urbanity levels. They earn below-average incomes working in blue-collar occupations.	1.3M	14.2%	10.0%	70		36.6%	258		14.5%	102	

Source: PRIZM, MobileScapes, DemoStats

Benchmark: Ontario for DemoStats & Ontario Excluding Local-Market for Each Point of Interest for MobileScapes

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

WINE REGIONS BEST NON-LOCAL MARKET POTENTIAL

FOR PRINCE EDWARD, SOUTHWEST OF LONDON, NIAGARA WINERIES

Retired older to mature suburban couples living in suburban areas



Who are they?*

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



What do they like to do?*

- Sporting Events
- Parks/City Gardens
- Home and Craft Shows
- Theatre and Concerts-Variou Venues
- ATV/Snowmobiling
- Fishing/Hunting



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Proud Canadian
- Trust Small Business
- Support Community
- Want to Leave a Legacy



Find out where they live**

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

WINE REGIONS BEST NON-LOCAL MARKET POTENTIAL

FOR PRINCE EDWARD, SOUTHWEST OF LONDON, NIAGARA WINERIES

Upscale middle-aged to older suburban families



Who are they?*

- **Well-educated**
- **White-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 Park
- Home and Craft Shows
- Skiing-Cross Country and Downhill
- Curling
- Golfing



Platforms & Advertisement Channels?*

- Radio: Sports, Mainstream Rock
- TV: Auto Racing, Golf
- Internet: Moderate Users (3-4 hrs/day)
- Social Media: Pinterest



How do they think?*

- Need for Escape
- Want Control
- Reject Order
- Committed to Health
- Proud Canadian



Find out where they live**

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

WINE REGIONS BEST NON-LOCAL MARKET POTENTIAL FOR PRINCE EDWARD WINERIES

Older rural empty-nesters 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
- Theatre and Concerts-Variou Venues
- ATV/Snowmobiling
- Power Boating/Jet Skiing
- Hiking/Backpacking



Platforms & Advertisement Channels?*

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



How do they think?*

- Enjoy Being One with Nature
- Utilitarian Consumerism
- Need for Escape
- Guided by Reason and Logic
- Trust Small Business



Find out where they live**

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

WINE REGIONS BEST NON-LOCAL MARKET POTENTIAL

FOR PRINCE EDWARD, NIAGARA WINERIES

Wealthy older 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
- Theatre-Variety Venues
- Craft Shows
- Curling
- Skiing-Cross Country and Downhill



Platforms & Advertisement Channels?*

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



How do they think?*

- Vitality
- Guided by Reason and Logic
- Want Control
- Committed to Health
- Brand Matters



Find out where they live**

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

WINE REGIONS BEST NON-LOCAL MARKET POTENTIAL

FOR PRINCE EDWARD, NIAGARA WINERIES

Upscale diverse young urbanites living in rented high-rise apartments



Who are they?*

- **Well-educated**
- **White-collar**
- **Well-above-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
- Concerts-Night Clubs/Bars
- Theatre-Major Theatres
- Adventure Sports
- Health Club Activity



Platforms & Advertisement Channels?*

- Radio: Classical/Fine Arts, Alternative Rock
- TV: Tennis, Sci-Fi Shows, Soccer
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, YouTube



How do they think?*

- Open to Learn from Diversity
- Interest in Diversity
- Want Control
- Ecological Concern
- Pursuit of Originality



Find out where they live**

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

WINE REGIONS BEST NON-LOCAL MARKET POTENTIAL FOR SOUTHWEST OF LONDON, NIAGARA WINERIES

Mature empty-nesters with modest incomes living in mixed urbanity levels



Who are they?*

- **Trades** or **College** Certificate
- **Blue-collar**
- **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
- Fishing/Hunting



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Rock
- TV: Curling, CFL, Daytime Soap Operas
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Canadian Living
- Internet: Light Users (0-1 hrs/day)
- Social Media: Pinterest



How do they think?*

- Enjoy Being One with Nature
- Financial Concern Regarding the Future
- Utilitarian Consumerism
- Guided by Reason and Logic
- Trust Small Business



Find out where they live**

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

A person in a canoe is on a calm body of water under a dramatic sunset sky. The sky is filled with vibrant orange, red, and purple clouds. In the far distance, a city skyline is visible on the horizon.

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