

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 dramatic, with bright light coming from the opening in the ice, creating a strong contrast with the dark water.

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

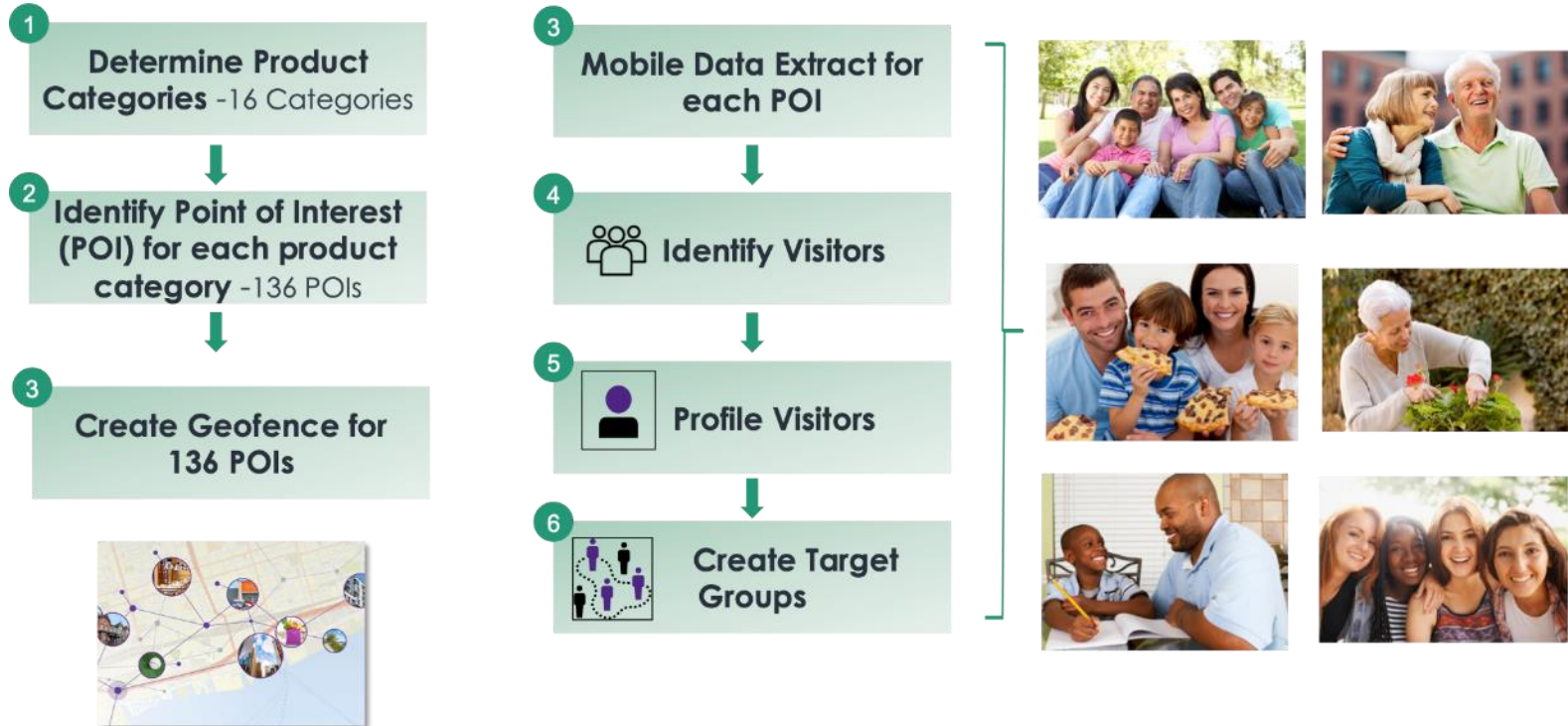
Some product categories were not included as they were too difficult to analyze:

- 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



FRANCOPHONE EXPERIENCES SUMMARY

FRANCOPHONE EXPERIENCES: LOCAL VISITORS

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FRANCOPHONE EXPERIENCES LOCAL VISITORS' SUMMARY

Please refer to each Target Group profile for full detail		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						
LOCAL TARGET GROUPS	TG1	Younger to middle-aged urban singles residing in rented apartments. These university educated individuals tend to work in white- or grey-collar occupations, earning slightly below-average household incomes.	893K	16.8%	28.8%	343	
	TG2	Older to mature suburban couples living in single-detached houses. They are likely to utilize their trades or college educations in blue-collar occupations earning incomes on par with the market average.	199K	3.8%	16.7%	889	

FRANCOPHONE EXPERIENCES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Younger to middle-aged urban singles residing in rented apartments



Who are they?*

- **Well-educated**
- **Grey- or White-collar**
- **Slightly below-average** household income
- **Less likely** to be culturally diverse



What do they like to do?*

- Film and Music Festivals
- Ballet/Opera/ Symphony
- Comedy Clubs/Shows
- Concerts-Night Clubs and Outdoor Stages
- Theatre-Major Theatres
- Martial Arts
- Billiards/Pool



How do they think?*

- Open to Learn from Diversity
- Interest in Diversity
- Flexible Definition Families
- Ecological Concern
- Pursuit of Originality



Platforms & Advertisement Channels?*

- TV: Tennis, Sci-Fi Shows
- Newspaper: The Globe and Mail
- Internet: Heavy Users (4+ hrs/day)
- Social Media: LinkedIn, YouTube, Twitter



Find out where they live**

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

FRANCOPHONE EXPERIENCES BEST LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban couples 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-Community and Festivals
- ATV/Snowmobiling
- Power Boating/Jet Skiing
- Skiing-Cross Country



How do they think?*

- Need for Escape
- Enjoy Being One with Nature
- Utilitarian Consumerism
- Guided by Reason and Logic
- Technological Anxiety



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Hits
- TV: Golf, CFL, Curling, Home Reno Shows
- Newspaper: Community Newspaper
- Internet: Light Users (0-2 hrs/day)
- Social Media: Pinterest, Facebook



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FRANCOPHONE EXPERIENCES: NON-LOCAL VISITORS

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FRANCOPHONE EXPERIENCES 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	
		Target Group Description	Count	% of Total	Visitor Behaviour Comp% Index	Non-Local Visitors for Community Attractions
NON-LOCAL TARGET GROUPS	TG1	Diverse middle-aged to older suburban wealthy families with school-aged children. These university educated individuals tend to work in white-collar occupations, earning well-above-average household incomes.	654K	9.4%	15.3% 164	
	TG2	Middle-aged to older suburban families with children. They are likely to utilize their trades or college educations in blue-collar occupations, earning above-average household incomes.	1.3M	19.1%	26.6% 139	
	TG3	Older to mature suburban singles and couples. They are likely to have trades or college certificates and work in blue-collar occupations.	840K	12.0%	20.1% 167	

FRANCOPHONE EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL

FOR COMMUNITY ATTRACTIONS

Diverse middle-aged to older suburban wealthy families with school-aged children



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
- Indoor Amusement Centres
- Popular Music/Rock Concerts
- Hockey
- Adventure Sports
- Basketball



How do they think?*

- Canada a 'Land of Opportunity'
- Enjoys Advertising
- Ostentatious Consumption
- Brand Matters
- Vitality



Platforms & Advertisement Channels?*

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



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FRANCOPHONE EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Middle-aged to older suburban families with 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
- National or Provincial Park
- Home and Craft Shows
- Theatre-Community Theatre
- Fishing/Hunting
- ATV/Snowmobiling



Platforms & Advertisement Channels?*

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



How do they think?*

- Need for Escape
- Want Control
- Technology Anxiety
- Want to Leave a Legacy
- Guided by Reason and Logic



Find out where they live**

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FRANCOPHONE EXPERIENCES BEST NON-LOCAL MARKET POTENTIAL FOR COMMUNITY ATTRACTIONS

Older to mature suburban singles and couples



Who are they?*

- **Trades** or **College** Certificate
- **Blue-collar**
- **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
- Theatre-Community and Festivals
- Concerts-Outdoor Stages
- ATV/Snowmobiling
- Power Boating/Jet Skiing
- Fishing/Hunting



How do they think?*

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



Platforms & Advertisement Channels?*

- Radio: Today's Country, Classic Hits
- TV: Curling, Golf, CFL, Daytime Soaps
- Newspaper: Community Newspaper
- Magazine: CAA Magazine, Canadian Living
- Internet: Light Users (0-1 hr/day)
- Social Media: Pinterest, Facebook



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