

Applying Consumer Insights To Attract North American Visitors

October 23rd, 2012



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ONTARIO
Yours to discover

OTMPC

Ontario

MINISTRY OF TOURISM, CULTURE AND SPORT

Growth summary



Ontario strives for tourism growth

The RTO structure was created as a platform for driving growth

It focuses marketing and the development of Ontario's diverse tourism assets.

The growth outcomes will be diverse:

- Appropriately develop and package regional product;
- Attract new spending and boost frequency among core visitors;
- Attract new and peripheral visitors.
- Define high potential consumer segments and source markets for targeting by Region.

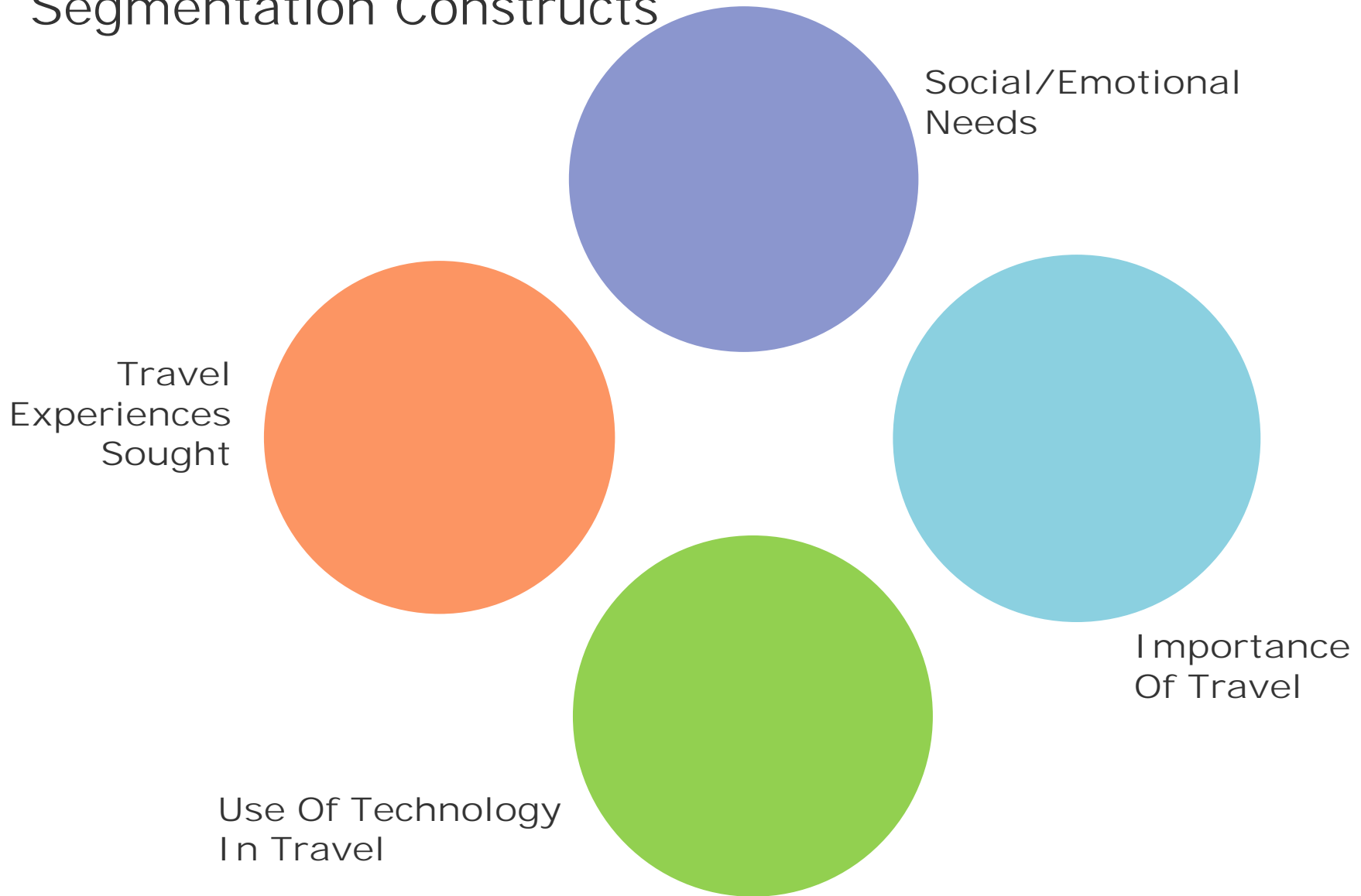
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Segmentation Constructs



Geographic Coverage Of The Research



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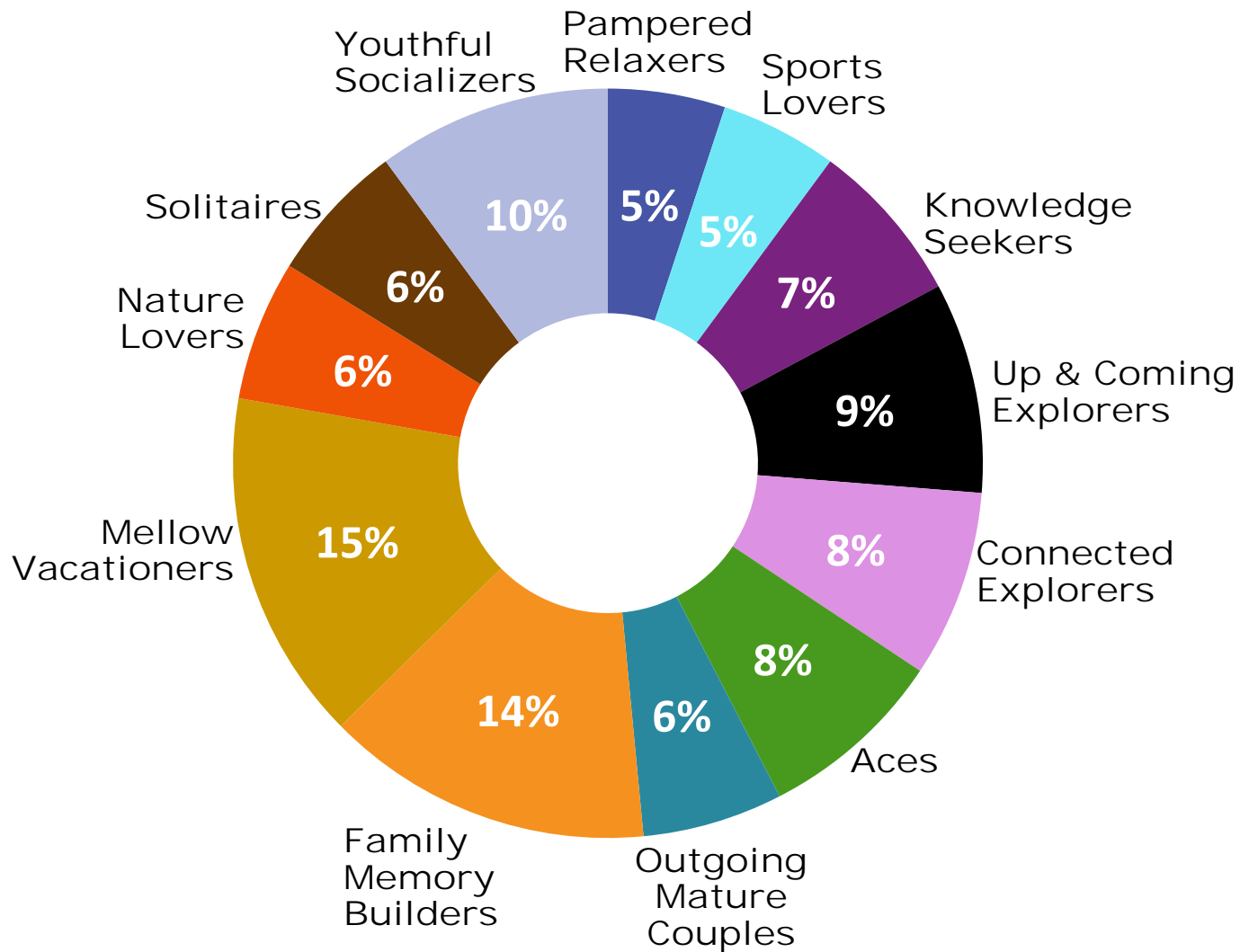
Introducing The Segments



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12 Unique Segments Were Identified



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Who Are They?



Introducing Pampered Relaxers...

5%

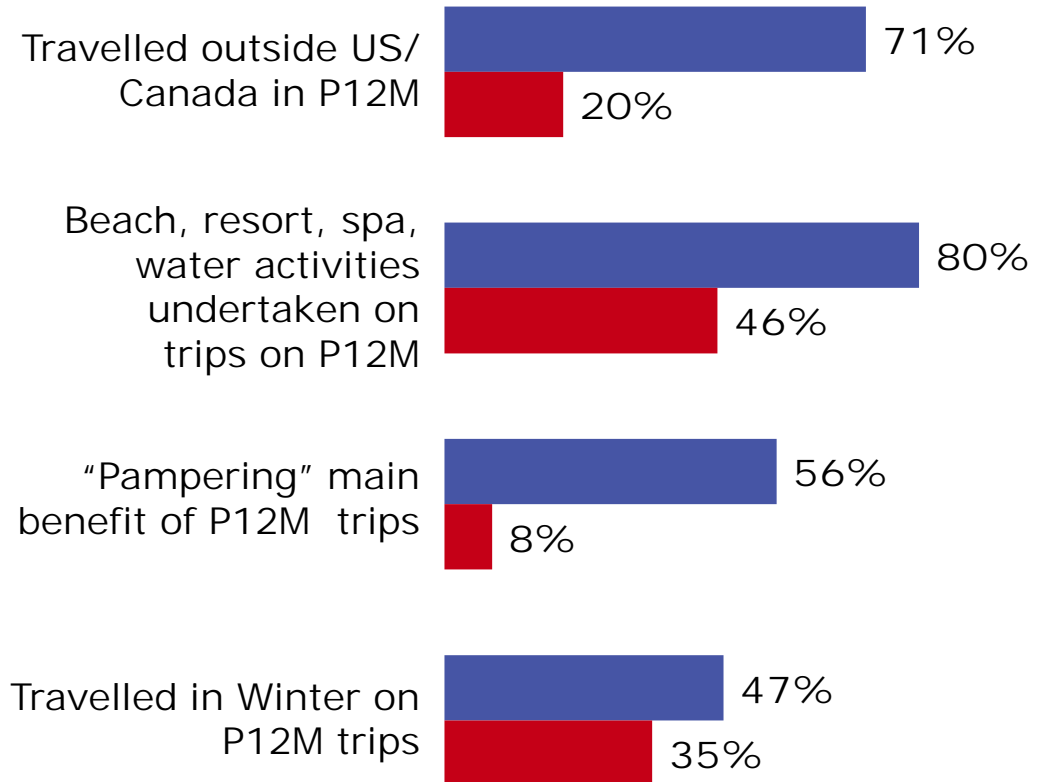
Pampered Relaxers



This segment is defined by an orientation toward pampering and resort life experiences. This very often involves beach experiences, water and sun destinations in winter.

For this segment, vacations are a time to relax and re-energize often through high-end sophisticated activities.

Key Differentiators



■ Pampered Relaxers
■ Total Travellers



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Introducing Sports Lovers...

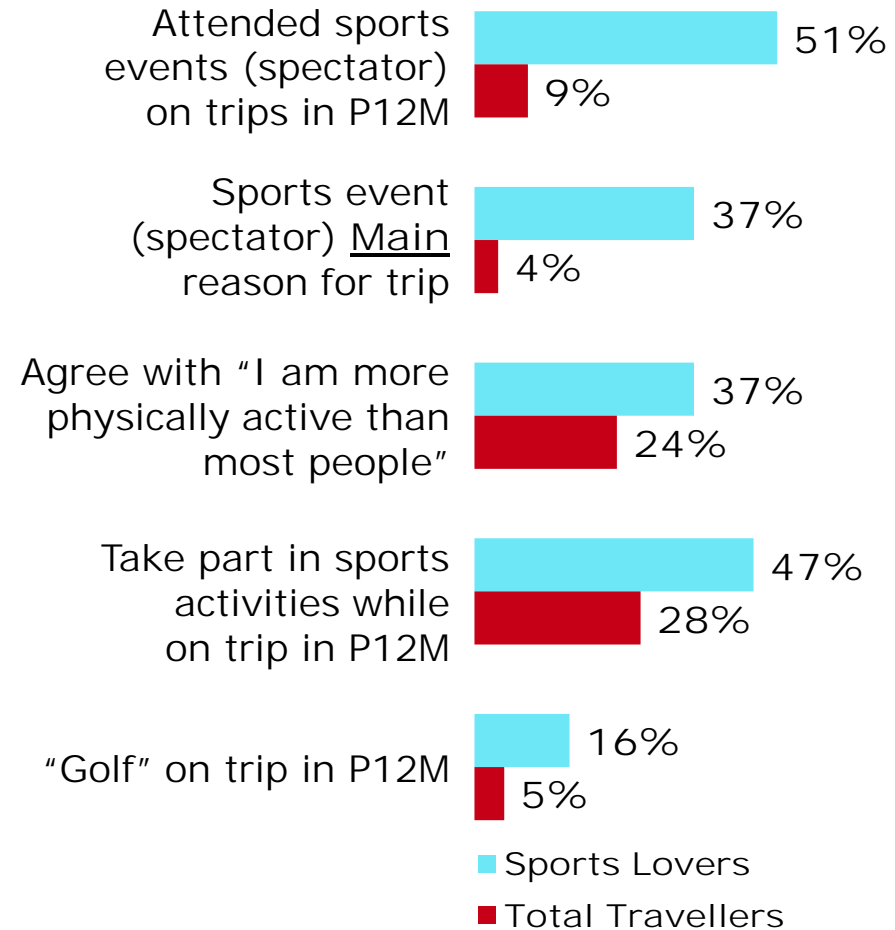
5%

Sports Lovers

This group, skews more male, and is driven by a love of sports, either watching or participating. By the nature of their passion these people describe themselves as more active and energetic than most. In reality their sports are not necessarily extreme more in keeping with what is readily available, and more likely to be organized team sports and golf.



Key Differentiators




Introducing Knowledge Seekers...

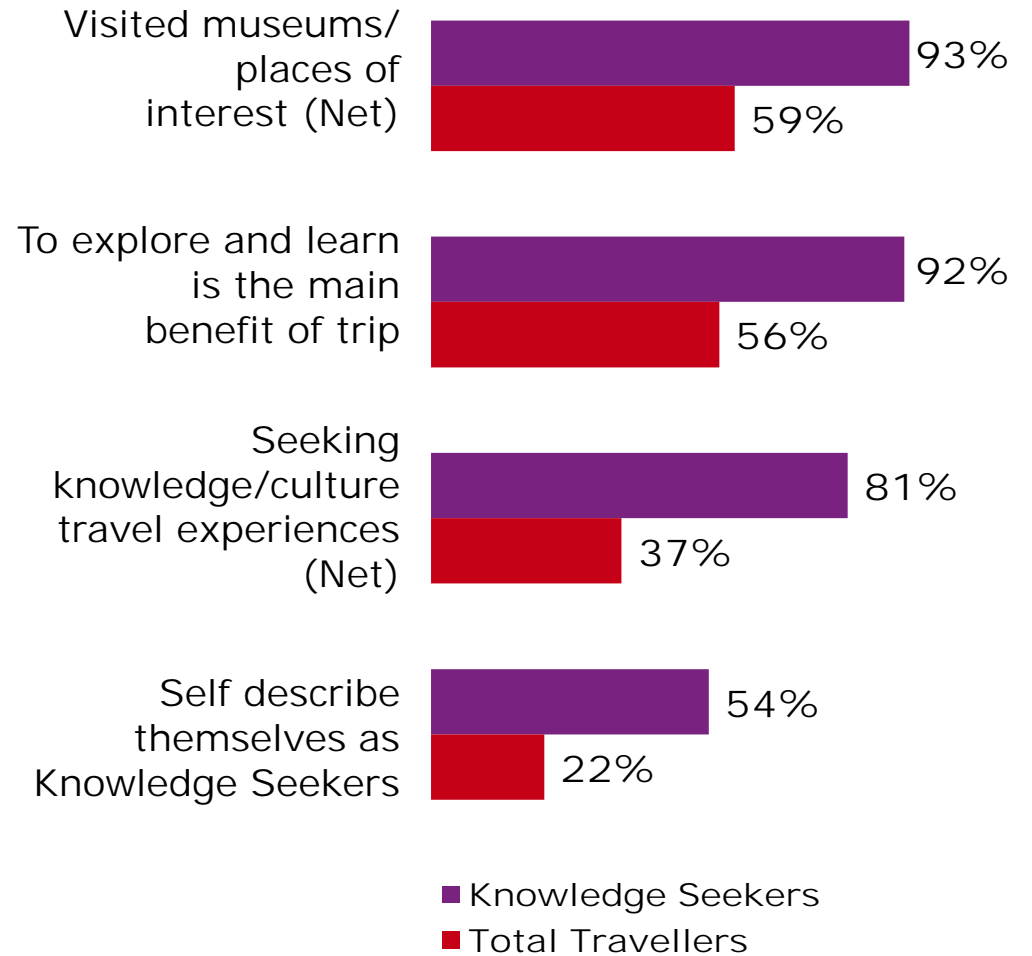
7%

Knowledge Seekers

Travellers in this segment are looking to appreciate and understand the places they visit. Their trips are typically about expanding their knowledge and stimulating their minds rather than resting and relaxing. They are driven by a desire to explore culture, history, architecture and natural landmarks and often focus on sight-seeing, museums, galleries and historical sites.



Key Differentiators



Introducing Up & Coming Explorers...

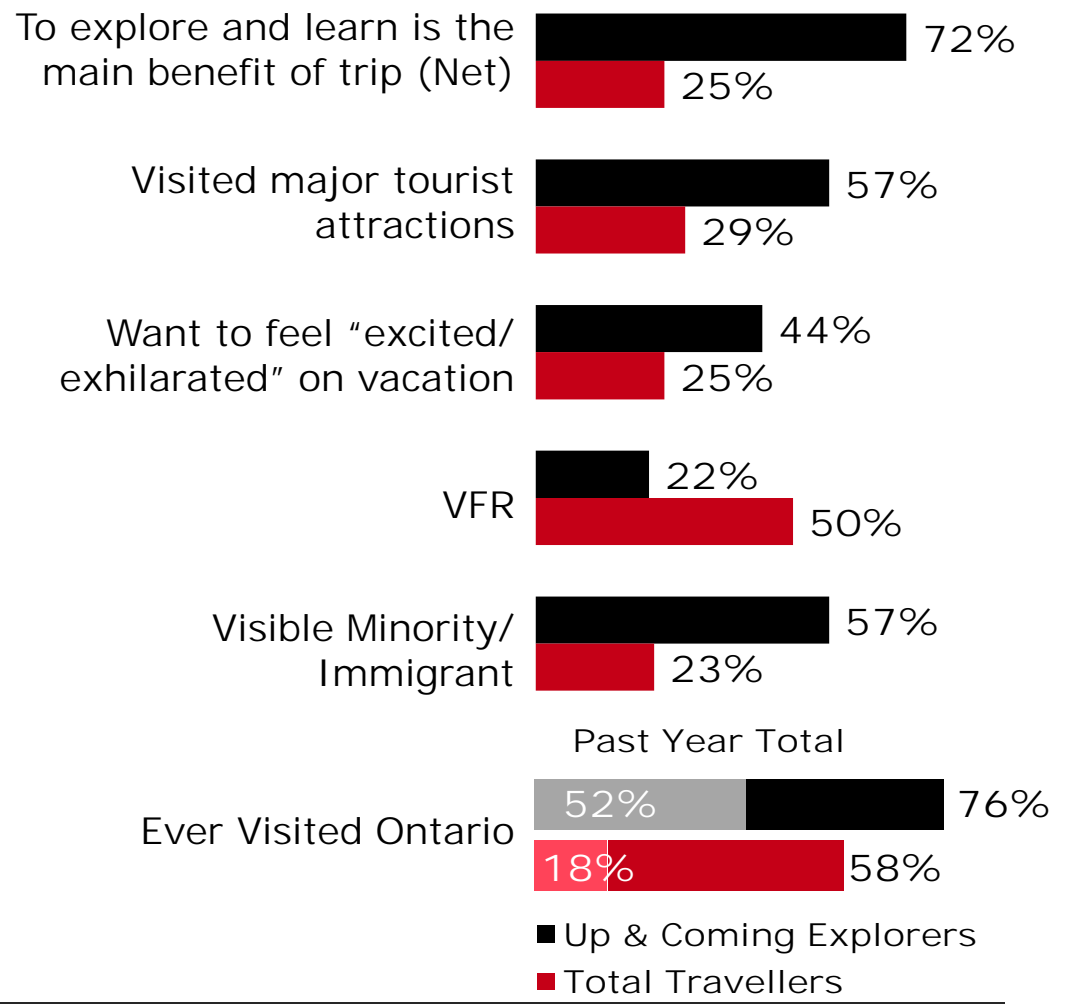
9%

Up & Coming Explorers



This is a youth-oriented group that is on its way up in the world. These travellers are emerging into a new life-stage, often characterized by greater affluence and new opportunities. Visible minorities and immigrants often fall into this segment. Travel is not about connecting with family or friends. While these people often want to be adventurous and energetic, their travel experiences often start with core tourist attractions. Ontario and the active outdoors is popular, with visitation typically being very recent.

Key Differentiators



Introducing Connected Explorers...

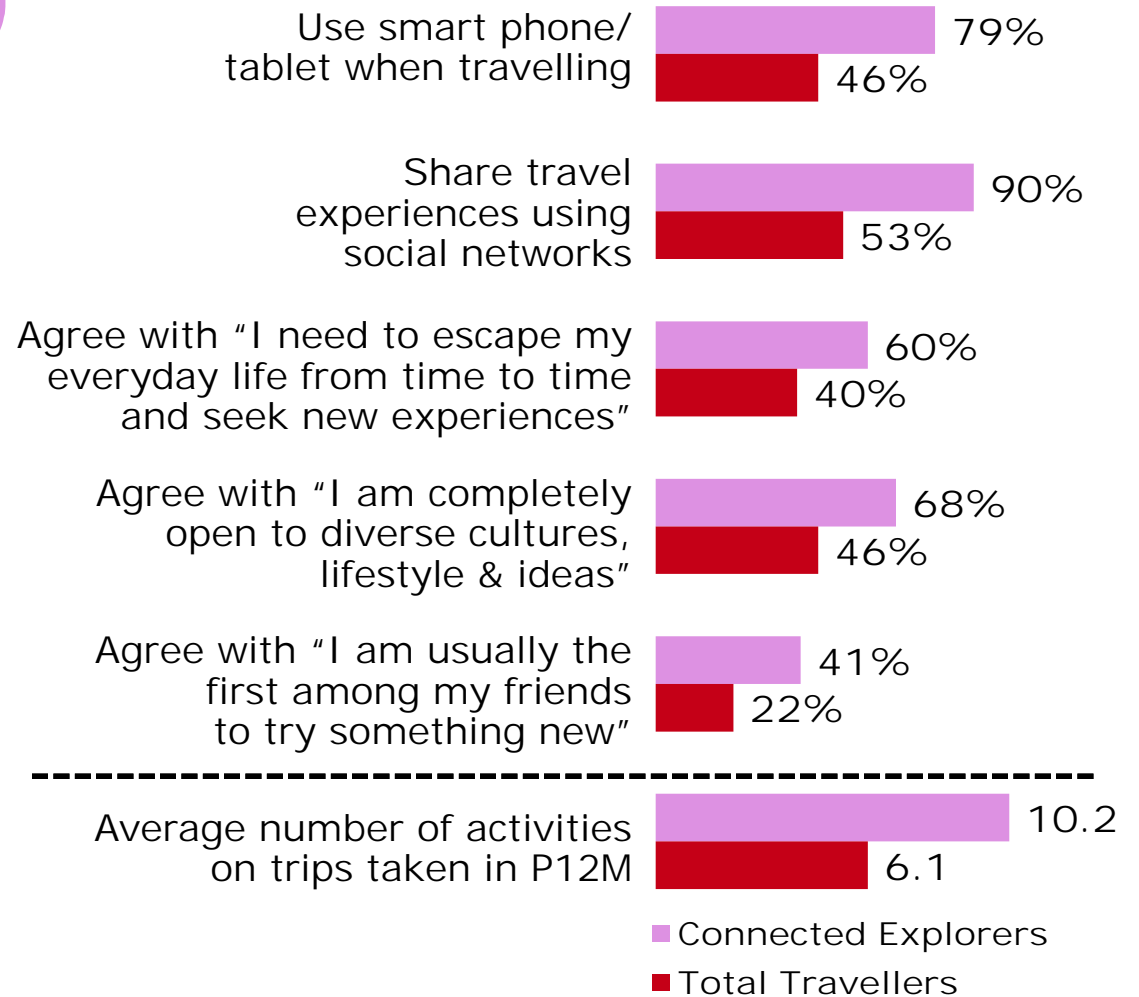
8%

Connected Explorers

This segment has a psychological need to take a break from the everyday and be exposed to new experiences and knowledge. They are committed to expanding their horizons through travel. Interestingly, the Internet and new technologies are key instruments in facilitating these travel interests & experiences. They research, book and share travel experiences through new technologies – before, during and after trips.




Key Differentiators



Introducing Aces...

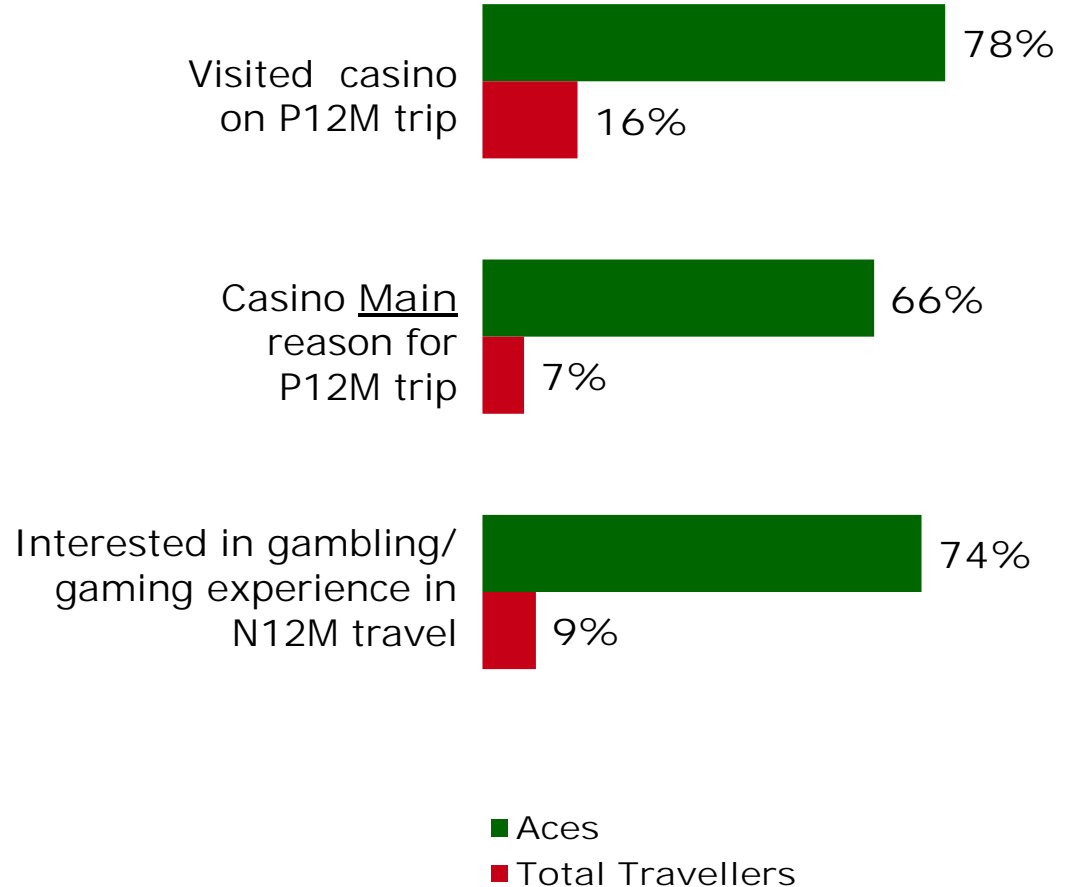
8%

Aces



Predominantly driven by a love of gaming and gambling, this segment loves casinos and the related ambiance that provides them with a sense of escape. For this group, the casino resort environment provides them with a sense of indulgence and escape as everything to have 'fun' is located close at hand.


Key Differentiators



Introducing Outgoing Mature Couples...

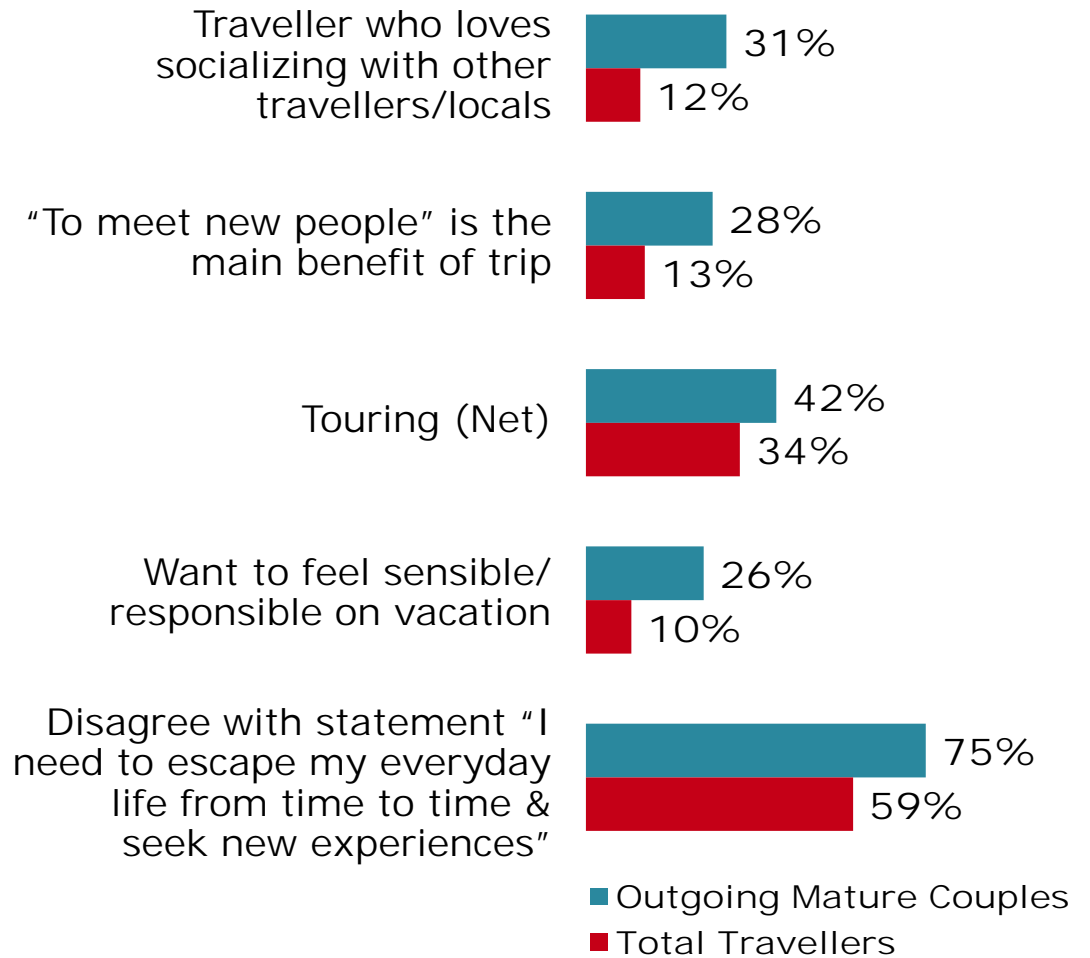
6%

Outgoing Mature Couples



Skewing strongly toward seniors and those in retirement, these travellers are driven by a desire to maintain their vitality and connection with the world. They are not particularly adventurous, rather they want to maintain their vitality often by interacting with new people (travellers and locals alike). It is important to them to feel competent and vital.

Key Differentiators




Introducing Family Memory Builders...

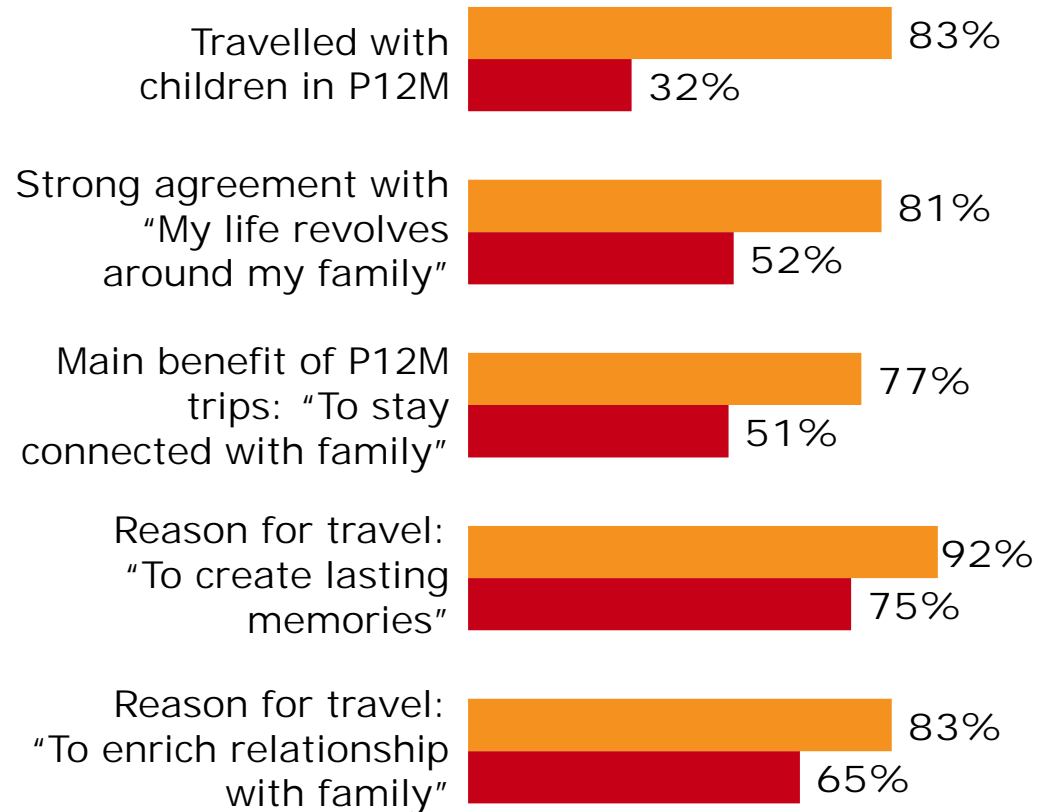
14%

Family Memory Builders

This is a segment driven by families with children < 18. They want a playful vacation that is centred around building family memories and strengthening the bonds. Activities such as theme parks allow the family to have fun and build these lasting memories.



Key Differentiators




■ Family Memory Builders
 ■ Total Travellers



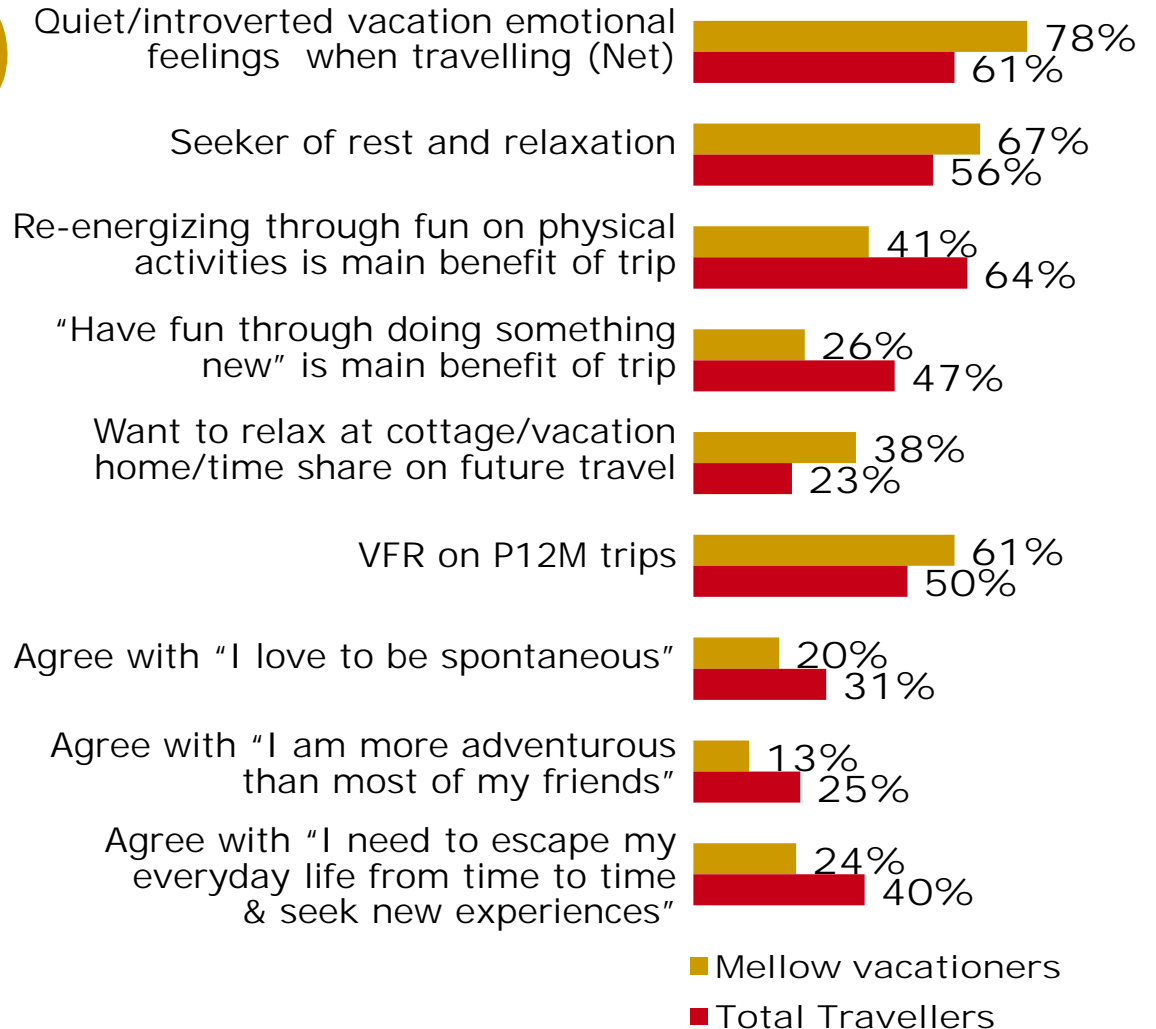
Introducing Mellow Vacationers...

Mellow Vacationers 15%



This segment wants to unwind on vacation, and relaxed and low key experiences are their preference. This group doesn't want itineraries or to do anything new or unusual. They want travel experiences that set them at ease. They aren't activity-oriented and often travel as a couple.

Key Differentiators




Introducing Nature Lovers...

7%

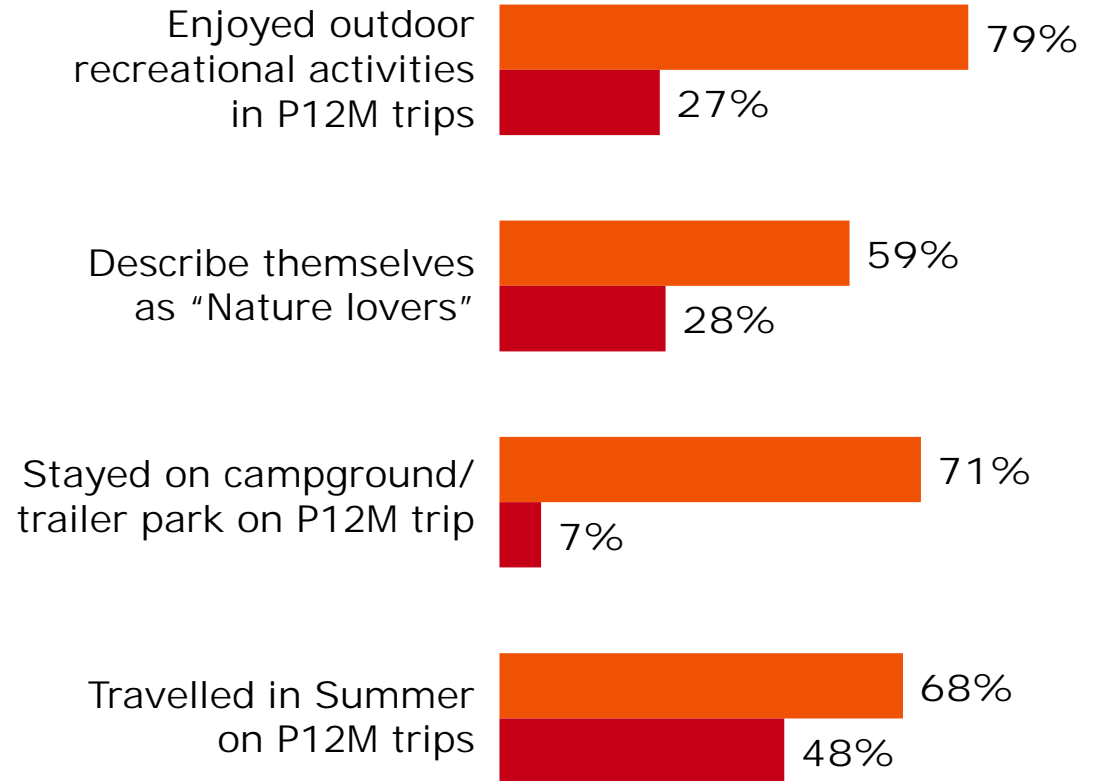
Nature Lovers

This is a consumer segment attracted to outdoor experiences aligned to Ontario's quintessential parks & lakes offering. Camping and associated activities, e.g., hiking, canoeing, fishing are key interests for this group. The majority classify as "nature lovers". Activities align with the recreational aspects of the outdoors and not necessarily the extreme aspects of the outdoors, e.g., avid angling or hunting.

Not surprisingly, the travel style is basic with camping prevalent.



Key Differentiators



■ Nature Lovers
 ■ Total Travellers

Note: Camping and related outdoor activities includes camping, hiking, fishing, canoeing, kayaking, ATV and bike trails.



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Introducing Solitaires...

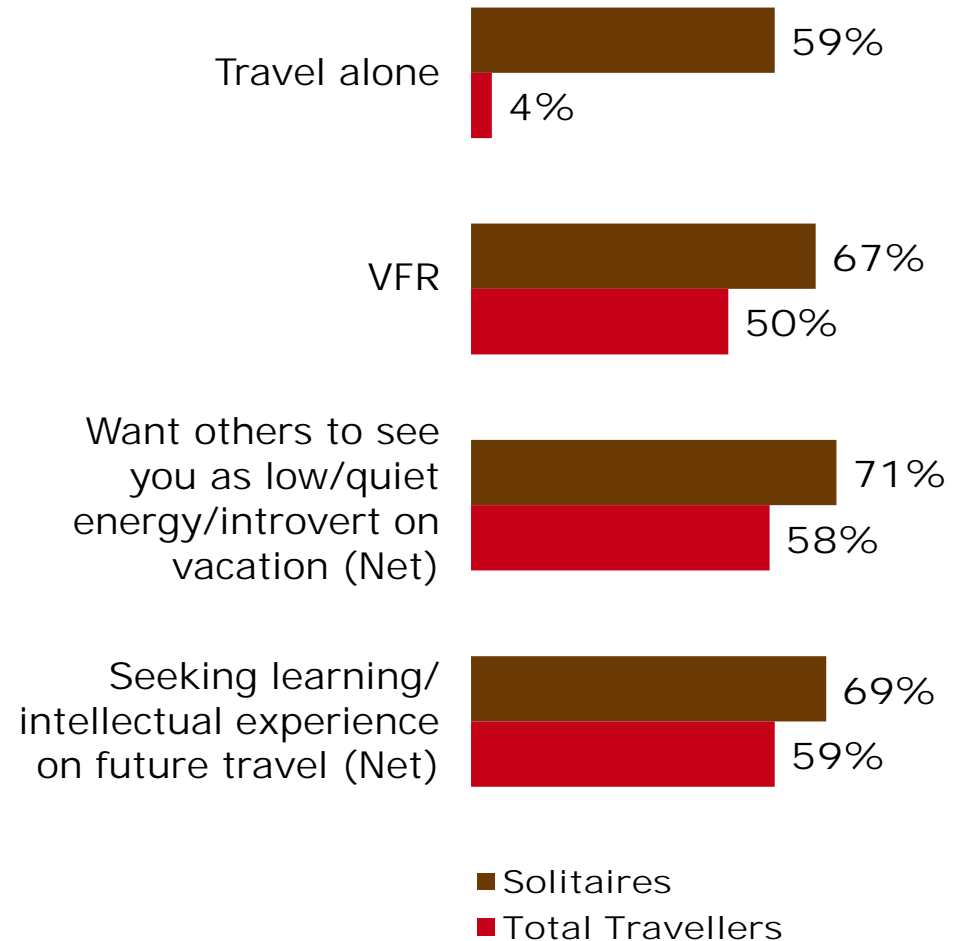
7%

Solitaires

This group of largely single people often travel alone. They are quiet and reserved people, whose travel experiences and budgets are often quite basic. While they often connect with acquaintances or family at the destinations they choose, they are introspective people. If they gravitate to any forms of activity, they tend to be those that can be enjoyed in isolation and align with inward thinking (museum, galleries).



Key Differentiators



Introducing Youth Socializers...

10%

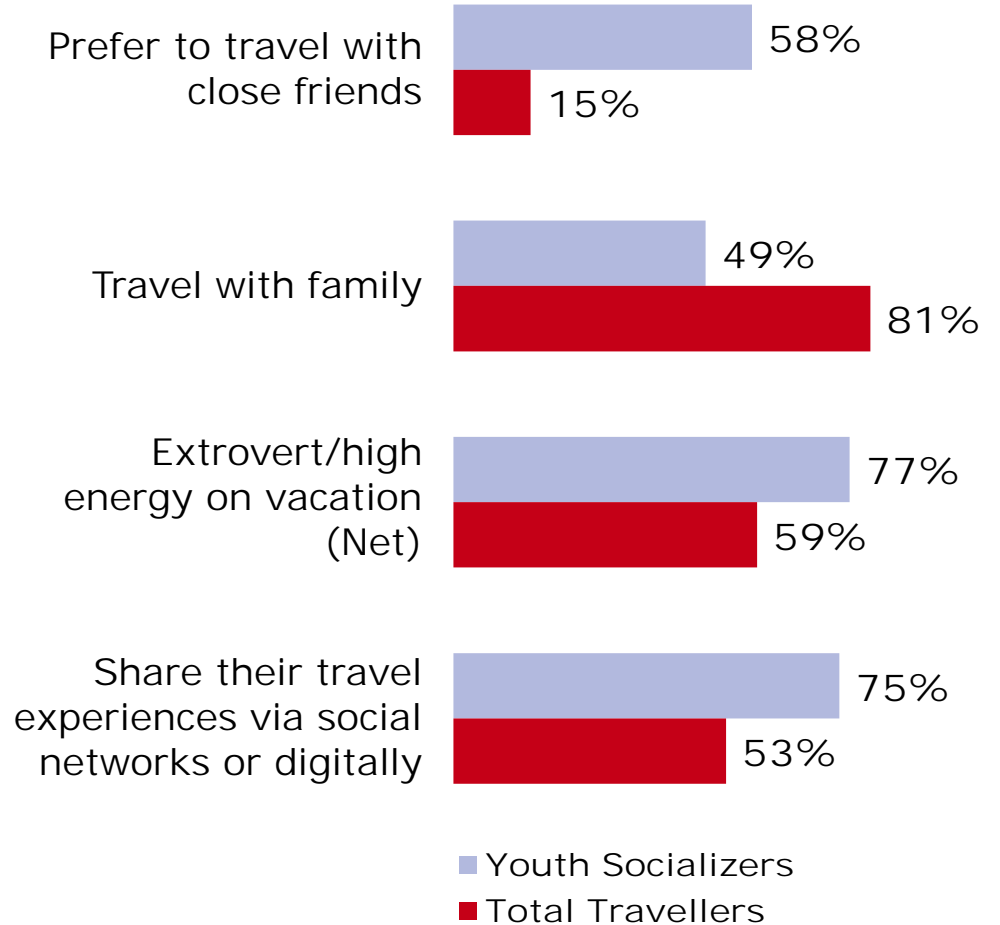
Youth Socializers



This is a typical youth segment driven by a love of socializing with friends on vacations, often on a limited budget.

This is a group that wants to have fun and unwind on vacation and this is best achieved by spending time in a group and sharing experiences with others.

Key Differentiators



Demographic Classification

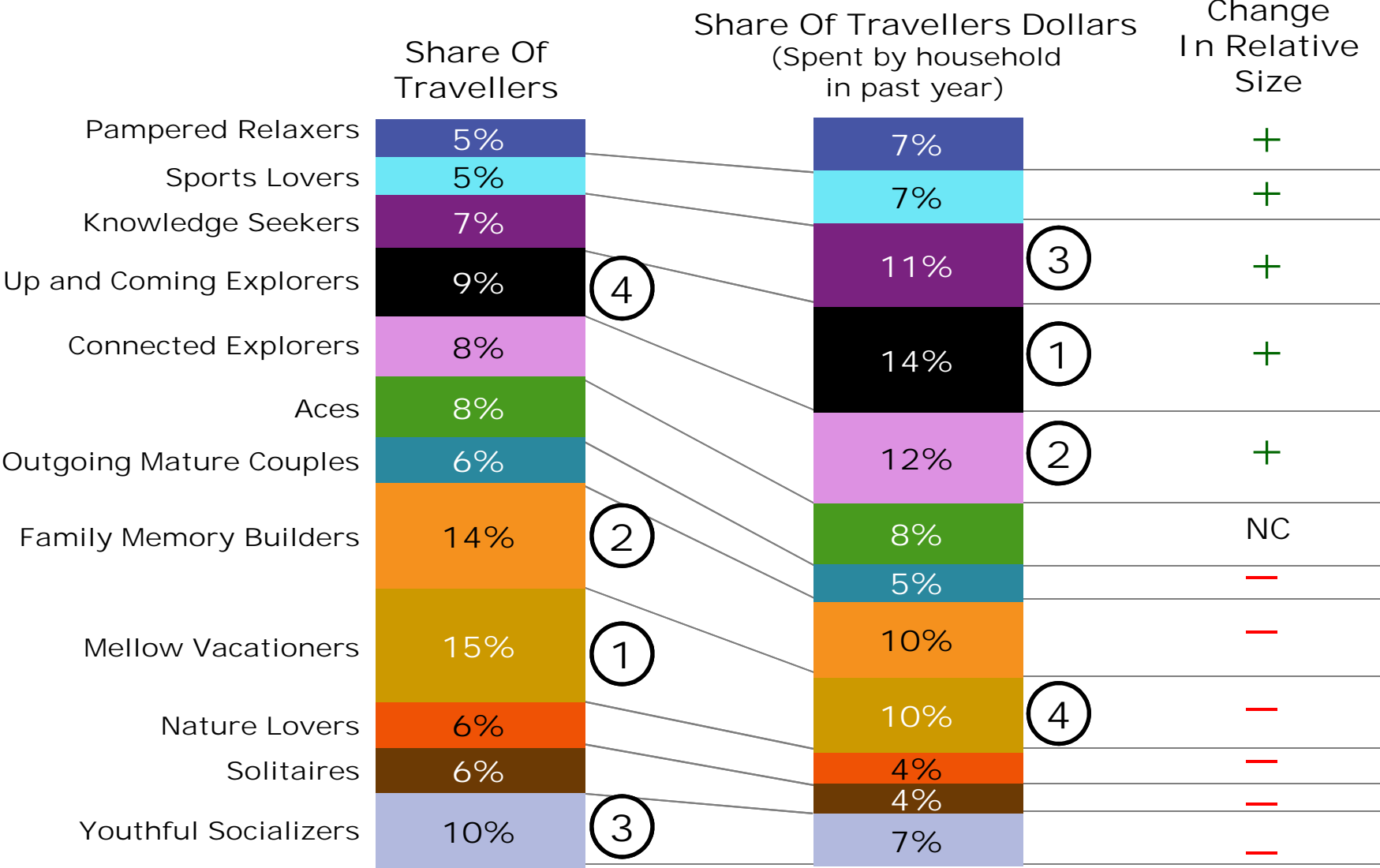
Older		<p>Outgoing Mature</p> <p>Know. Seekers</p> <p>Mellow Vacationers</p> <p>Aces</p>	
Mid	<p>Solitaires</p>	<p>Pampered Relaxers</p> <p>Sports Lovers</p>	<p>Nature Lovers</p> <p>Family Memory Builders</p>
Younger	<p>Youthful Socializers</p>	<p>Connected Explorers</p>	<p>Up & Coming Explorers</p>
	Singles	Couples	Families



How Valuable Are They?



"Dollars vs. Bodies"



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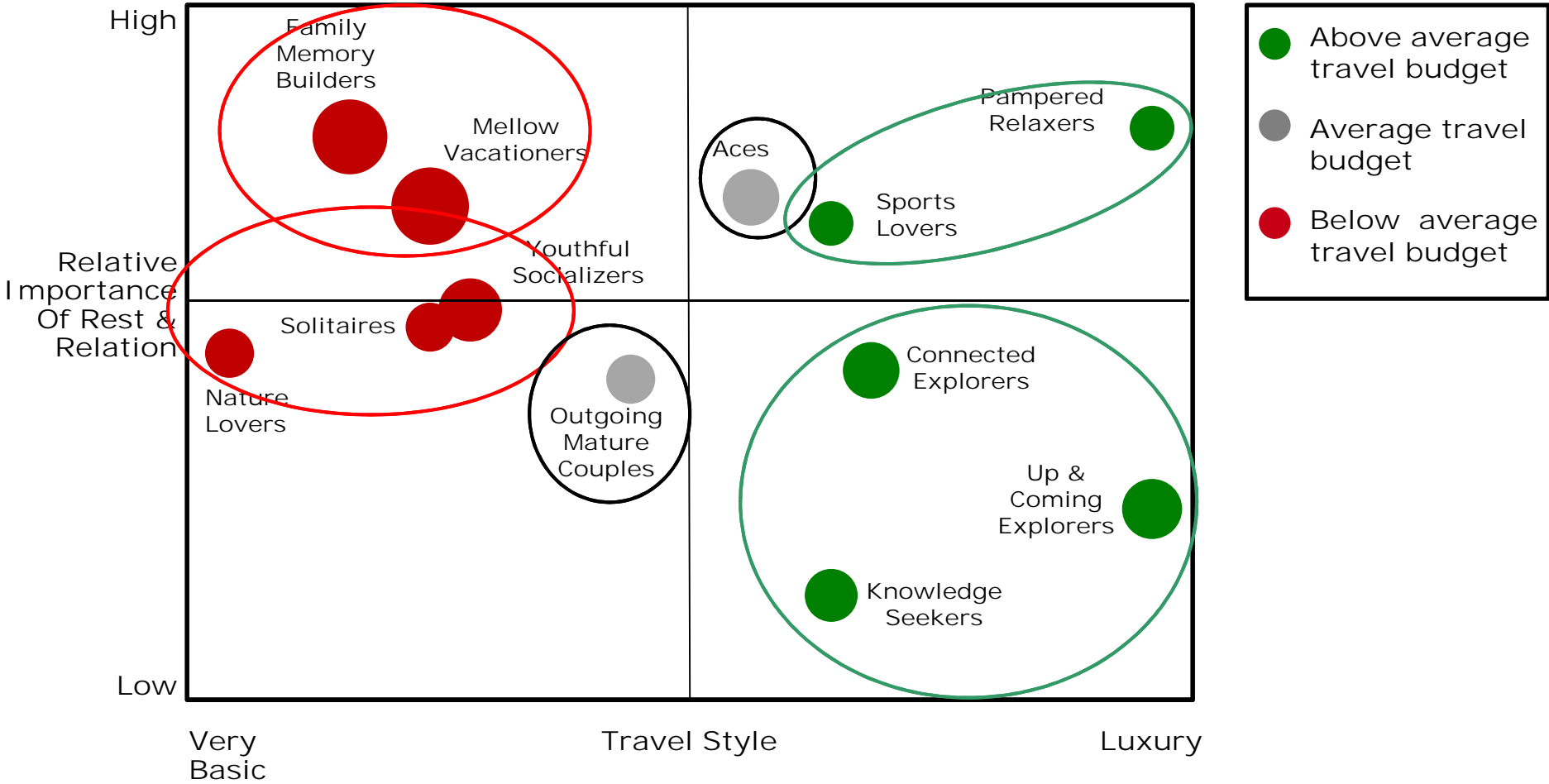
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What Do They Look For From Travel?



Mapping of Segments on Travel Fundamentals

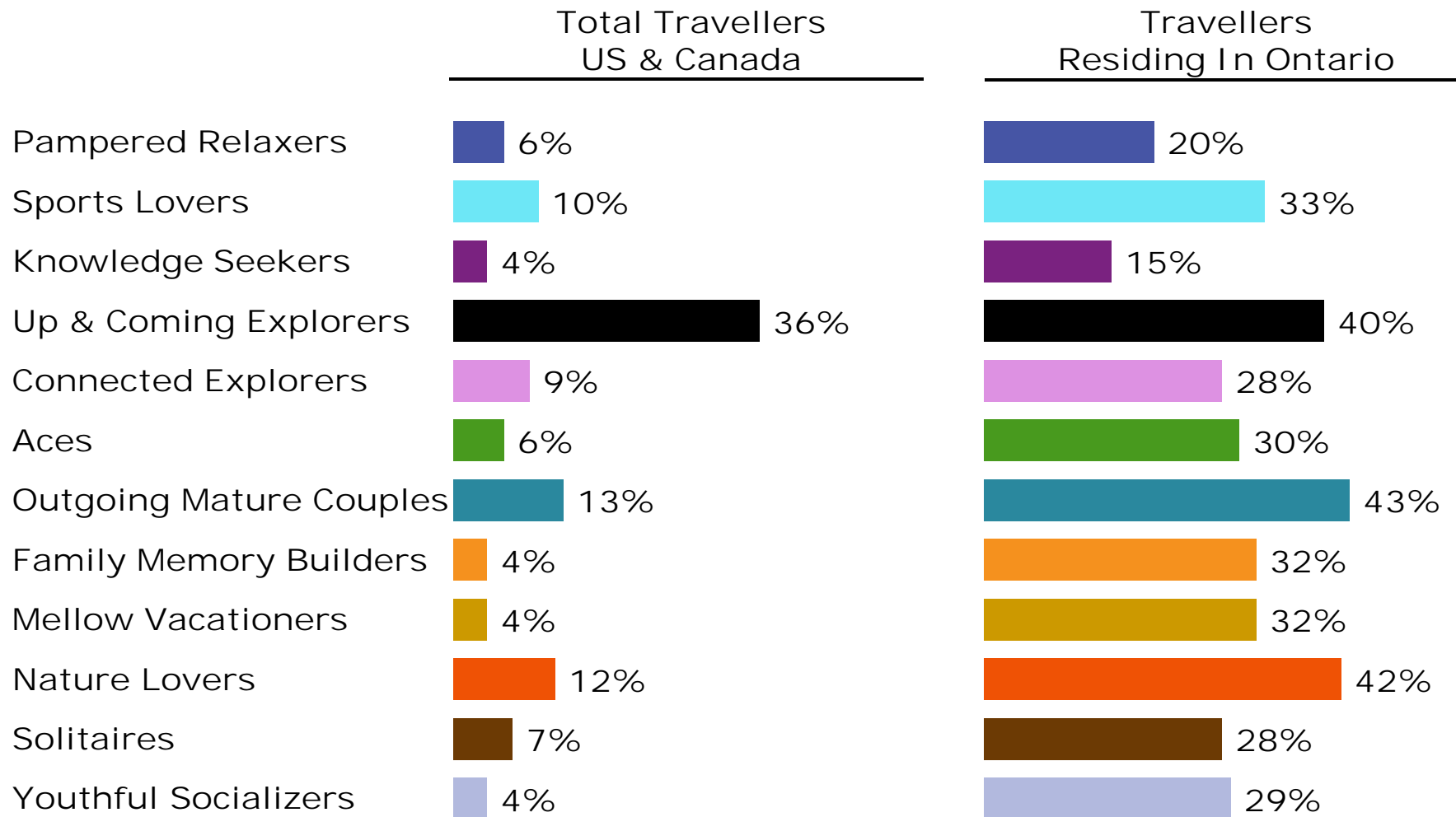
Travel Style, Importance of Rest & Relaxation and Travel Budget



Note: Size of bubble corresponds to size of segment



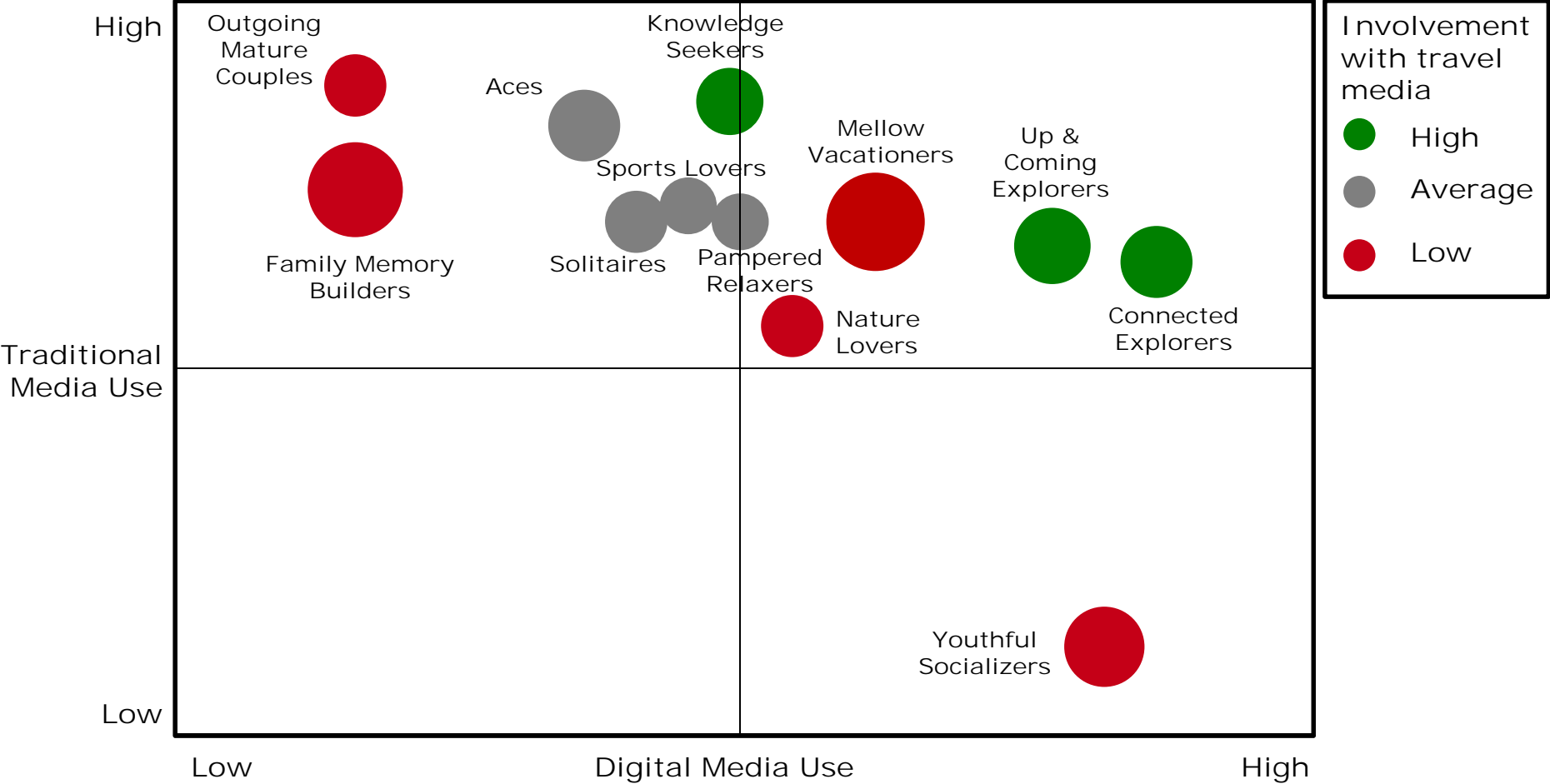
% Share Of Spend In Ontario



How To Reach Target Segments.



Media Consumption Patterns



Note: Size of bubble corresponds to size of segment

