Key Findings

Ontario Tourism Marketing Partnership Segmentation Summary
June 2007
TAMS Travel Data

Survey Data
Methodology

TAMS Travel Data

- In Canada we used a special cut of data - ON Residents who travel within ON
- US was restricted to US respondents who travel to ON in Tier 1-3
What is PRIZM CE?

- An innovative consumer segmentation system that classifies all Canadians into one of 66 groups based on their demographics, behaviours and attitudes.
- The first Canadian segmentation model to link geodemographics to Social Values data to explain consumer behaviour.
- Allows marketers to tailor products, services and craft messages that will resonate with their target market.

Captures

- Socio-economic status (not just income e.g. retirees with fixed income but high disposable income)
- Regionality
- Ethnic Diversity
- Urbanity
- Demographic changes
- Behaviours
- Attitudes/mindsets
- North American similarities and differences

![PRIZM CE](PRIZM_CE.png)

**Description**

**Age**
- Middle-Aged & Older

**Housing Tenure**
- Homeowners

**Education**
- University

**Job Type**
- White Collar

**Ethnic Presence**
- Some

**Preferences**

**Sample Environments**
- Very affluent middle-aged and older city dwellers
- Sailing
- $2,500+ on women’s clothes
- BMW

**Social Value**
- Need for personal achievement

**01 Cosmopolitan Elite**
- U1 Urban Elite

**22 Asian Up-and-Comers**
- S2 Suburban Upscale Ethnic

**30 Traditional Quebec Towns**
- L3 Exurban Francophone

**Successful middle-aged Asian families**
- Middle-Aged
- Homeowners
- University/College
- Service Sector & White Collar

**High**
- Tennis
- Cell phones
- NBA games
- Premium ice cream
- Internet banking

**Introversion and empathy**
- Sewing
- Winners
- Mittelmédia
- Tomato juice
- Hyundai

**Spiritual quest**
- Older
- Homeowners
- High School/College/Trade
- Mixed
- Low
- French
- English
- Asian
- Jewish

**North American similarities and differences**
How the Target Groups were Created

- Data included in the analysis for Ontario and the US were:

<table>
<thead>
<tr>
<th>TAMS Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Visited ON for Pleasure (past 2 years)</td>
</tr>
<tr>
<td>• Frequency of Trips to ON</td>
</tr>
<tr>
<td>• Have Access to Cottage within Province (Canadian data only)</td>
</tr>
</tbody>
</table>

- Four similar segments based on lifestage exist both sides of the border
Ontario Market
50% of the ON households are in the target groups

According to TAMS:
- 59% of ON residents travel within ON for pleasure
- 10% of US residents in Tier 1-3 travel to ON for pleasure
## Ontario Target Groups Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Market Size</th>
<th>Demographics</th>
<th>Key Behaviours</th>
<th>Travel Behaviours</th>
</tr>
</thead>
</table>
| Upscale Adventurers | Well-off older middle-aged married couples with adult-age children & some empty nests | 558,366 (11.64%) ON hhds | • Middle aged (45-64) families; Kids (18+)  
  • Large (Over 1/3 with 4+)  
  • Own; Older single-detached  
  • University (42%)  
  • White Collar (41%), Self Employed (14%)  
  • Public Transit, Car  
  • Average (31% Imm. Pop)  
  • English and French  
  • $121,848 (54% above avg) | • Europe, Golf/Ski in Ontario  
  • # of trips in ON: 2,846,260  
  • Access to Cottage Channel: Index 129  
  • Online  
  • Ballet, Opera  
  • Ski, Tennis, Golf  
  • Casinos, Sporting events  
  • Read Newspapers  
  • Use Internet  
  • Do not like flyers | • Outdoorsy: jet/snow skiing, skate/snowboarding  
  • Theme parks, bowling  
  • Plays, dinner theatres  
  • Light TV/Radio users  
  • Average internet  
  • Time Savers  
  • Group Travel  
  • Family Vacations  
  • Status  
  • Mississauga  
  • Brampton  
  • Hamilton  
  • Ottawa |
| Provincial Families | Well-off younger and middle-aged suburban and exurban families with lots of children | 952,610 (19.84%) ON hhds | • Lower middle-aged (35-54) families; Kids (<15)  
  • Large (57% with 4+)  
  • Own; Newer singles and semis  
  • College (28%)  
  • Mixed  
  • Car  
  • Low (26% Imm. Pop)  
  • English  
  • $103,182 (31% above avg) | • Ontario, family destinations  
  • # of trips in ON: 4,757,604  
  • Access to Cottage Channel: Index 112  
  • Multiple, vehicle rentals  
  • Outdoorsy: jet/snow skiing, skate/snowboarding  
  • Theme parks, bowling  
  • Plays, dinner theatres  
  • Light TV/Radio users  
  • Average internet  
  • Time Savers  
  • Group Travel  
  • Family Vacations  
  • Status  
  • Mississauga  
  • Brampton  
  • Hamilton  
  • Ottawa | • World travel, Canada  
  • # of trips in ON: 721,763  
  • Access to Cottage Channel: Index 136  
  • Multiple, vehicle rentals  
  • Outdoorsy: jet/snow skiing, skate/snowboarding  
  • Theme parks, bowling  
  • Plays, dinner theatres  
  • Light TV/Radio users  
  • Average internet  
  • Time Savers  
  • Group Travel  
  • Family Vacations  
  • Status  
  • Mississauga  
  • Brampton  
  • Hamilton  
  • Ottawa |
| Young Go-Gos        | Young successful, well-off, multi-ethnic urban trendsetters                   | 181,124 (3.78%) ON hhds | • Young (25-44); Singles; no kids  
  • Small (73% 1 or 2 people)  
  • Rent  
  • University (55%)  
  • White Collar (48%), Service (38%)  
  • Public Transit, Walk, Bike  
  • Strong (33% Imm. Pop)  
  • English and French  
  • $91,492 (16% above avg) | • Ontario, family destinations  
  • # of trips in ON: 721,763  
  • Access to Cottage Channel: Index 136  
  • Multiple, vehicle rentals  
  • Outdoorsy: jet/snow skiing, skate/snowboarding  
  • Theme parks, bowling  
  • Plays, dinner theatres  
  • Light TV/Radio users  
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  • Average internet  
  • Time Savers  
  • Group Travel  
  • Family Vacations  
  • Status  
  • Mississauga  
  • Brampton  
  • Hamilton  
  • Ottawa |
| Retired Roamers     | Midscale mature and older retirees and seniors living in suburbia and towns    | 590,162 (12.3%) ON hhds | • Mature (55+), no kids  
  • Small (67% 1 or 2 people)  
  • Own; Older single-detached, 27% rent  
  • High School, College  
  • Mixed, White & Blue, Self-employed (13%)  
  • Car, 6% Walk  
  • Low (15% Imm. Pop)  
  • English  
  • $64,838 (18% below avg) | • Ontario, family destinations  
  • # of trips in ON: 2,699,941  
  • Access to Cottage Channel: Index 117  
  • Discount broker, self-book  
  • Festivals, fairs, markets  
  • RV, garden, boat shows  
  • Curling, snowmobiling, hunting, fishing  
  • Above avg TV/Radio/newspapers | • Mainly North America  
  • # of trips in ON: 2,699,941  
  • Access to Cottage Channel: Index 117  
  • Discount broker, self-book  
  • Festivals, fairs, markets  
  • RV, garden, boat shows  
  • Curling, snowmobiling, hunting, fishing  
  • Above avg TV/Radio/newspapers |
Upscale Adventurers

02 Urbane Villagers

03 Suburban Gentry

04 Asian Affluence

08 Money & Brains

10 Mr. & Ms. Manager

17 Cluttered Nests
Demographic Overview

The Upscale Adventurers group consists mainly of older middle-aged married couples with adult-age children (some empty nests). These well-off consumers own older single-detached homes in and around larger cities in mainly urban and suburban neighbourhoods. The members of this group are well educated, with almost half having attended university and they have parlayed their high education level into well-paid white collar positions. There is also a solid presence of entrepreneurs and the self-employed. These communities have an average ethnic presence, mostly made up of more established immigrants who arrived in Canada before the 1970s and a high instance of first and second generation residents. Chinese, Italian and Greek are the most prevalent groups, while a high proportion of Jewish consumers are also notable.

Snapshot Demographics

**Lifestage:** Middle aged (45-64) families; Kids (18+)

**HH Size:** Large (Over 1/3 with 4+ people)

**Housing Type:** Own; Older single-detached

**Education:** University (42%)

**Job Type:** White Collar (41%), Self Employed (14%)

**Commuting:** Public Transit, Car

**Ethnic Presence:** Average (31% Immigrant Pop); Chinese, Italian, Greek. High on Religion: Jewish

**Language:** English and French

**Average HH Income:** $121,848 (54% above average)

Geographic Overview

Distribution within Census Metropolitan Areas

![CMA/ CA Distribution Chart]

**Source:** PRIZM®, Statistics Canada,
Lifestyle Overview

Thanks to lofty incomes, the members of Upscale Adventurers can indulge in active leisurely pursuits. They’re heavily involved in sports—as both participants and spectators. They like to ski, jog and go canoeing. They try to stay fit and belong to health and country clubs, where they enjoy swimming, golf, tennis and aerobic exercise. But for one in ten, these activities are too pedestrian; they prefer extreme sports like sky diving, scuba diving and white water rafting.

Most adults in this group have no children to tie them down, so they can frequent such late-night entertainment venues as comedy clubs, casinos and dinner theaters. Because Upscale Adventurers appreciate the trappings of success, they like to score hot tickets for professional sporting events and have high rates for attending basketball, football and baseball games.

These busy suburbanites are just as fanatic about culture and the arts, regularly attending plays, ballets, operas and concert performances. Their fondness for being on the cutting edge of culture extends to travel activities as well: They’re more likely than the general population to attend exhibitions featuring travel and skiing.

Key Words

- Energy
- Control
- Aesthetics
- Comfort
- Connected
- Technology

Source: PRIZM C2, BBM RTS Canada
Travel Behaviour

Upscale Adventurers represent Ontario’s most active travellers, going abroad to visit museums and see the sights, and travelling throughout Canada to golf, ski and explore cultural offerings.

They’re particularly fond of vacationing in Mexico, the Western and Southern U.S. and Western Canada. Another favoured vacation destination is Europe, with the group exhibiting high rates for going to France, Italy and the United Kingdom.

Back in North America, their preferred destinations vary according to the season. In the winter, Upscale Adventurers like to fly off to beaches in Hawaii and the Southern U.S., or hit the slopes around Banff, Jasper and the U.S. Rockies. Come fall, they prefer Canadian locales, especially in New Brunswick and the Western Provinces.

In the spring and summer, they concentrate on perennial favourites like Whistler, Vancouver and Prince Edward Island as well as cities in the Western U.S. They also like to explore Ontario, especially in the summer and fall, when they leave Toronto behind to visit golf and ski resorts.

While many of these Canadians used to arrange their vacations through full-service travel agencies, today they’re more likely to go online to book their air and hotel accommodations as well as to search for information about package deals.

Nearly half use an online travel agency and many prefer to get promotions online or read about them in the business, sports or entertainment sections of newspapers.

While on vacation, these well-to-do travelers will enjoy a wide variety of activities, from downhill and cross country skiing to sailing and golfing. They will take in all sorts of cultural activities such as jazz concerts or operas, and will visit spas and wineries at above average rates. Taking in the architectural beauty of spots they visit, and hitting museums and other cultural sites are also popular vacation activities.

Travel Motivations

Seek:

• Connection: These consumers are looking to make a connection with those around them. They are on a life long journey of learning. They feel they are more vital than the average person, which could motivate them to choose more active pursuits when they travel. Travel is a journey not a destination and is best experienced with like-minded companions who like to have fun while learning

• Attention to Detail: This group seeks an authentic experience and will avoid sterile, commercial hotels. They appreciate the fine details.

• Aficionados: These consumers really get into their hobbies or pursuits, and may be open to trips and packages which cater to their special interests or hobbies.

• Flexibility & Technology: They like to be in control. Give them options, but let them make choices. They are comfortable with technology plus it gives them additional control: consider online information and booking options.

Avoid:

• Nature: This group likes to be active and is not drawn to the rustic purity and serenity of open spaces or camping

• Spiritual Journeys: This group knows where they are and where they want to go. They are not interested in “finding themselves” when they travel.

• Price Point Sales: These travellers do not need to worry about the price of a package or trip. They will be discerning about getting value, but would be willing to pay for quality and would have no qualms about high priced options that were worth the money.

Source: PRIZM©, BBM RTS Canada, TAMS
Media Overview

The educated and affluent members of Upscale Adventurers are light media consumers overall, with a preference for print. They tend to watch sports or infomercials, but mostly are not big TV fans. They tune in to radio stations that offer talk, jazz and classic rock. They're especially fond of print media, reading daily newspapers and magazines that cover business, fashion, technology and news. Among their favourite periodicals are Canadian Business, Homemakers and Time. But they have also adopted new media and they will go online for email and just surf for entertainment. The propensity to use the Internet at school may indicate it is the kids who are online.

Media Usage

<table>
<thead>
<tr>
<th>Media</th>
<th>Upscale Adventurers</th>
<th>Total Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV (Heavy)</td>
<td>32.31%</td>
<td>27.07%</td>
</tr>
<tr>
<td>Radio (Heavy)</td>
<td>31.48%</td>
<td>28.74%</td>
</tr>
<tr>
<td>Newspaper (Heavy)</td>
<td>21.94%</td>
<td>27.21%</td>
</tr>
<tr>
<td>Magazine</td>
<td>35.78%</td>
<td>37.35%</td>
</tr>
<tr>
<td>Internet Usage</td>
<td>60.50%</td>
<td>66.43%</td>
</tr>
<tr>
<td>Direct (Favourable)</td>
<td>61.87%</td>
<td>58.49%</td>
</tr>
</tbody>
</table>

Source: PRIZM, BBM RTS Canada
Provincial Families

- 07 Winner's Circle
- 11 Pets and PCs
- 12 God's Country
- 14 Upward Bound
- 18 Blue-Collar Comfort
Demographic Overview

The members of the Provincial Families segment tend to be families in the lower middle age with lots of children, usually under 15. There is also an above average instance of multiple family households with some multigenerational families in the group. They house their large families in owned single and semi-detached dwellings in suburban and exurban neighbourhoods. Only about a quarter of these Ontarians has attained a university level education, although they are above average for attending a college. They have an even distribution in the workforce with a slight trend toward blue collar jobs and earn a comfortable 31% above the norm for Ontario. Mainly outside the city, they drive to and from work. There is not a strong ethnic presence in this group, with only some second generation immigrants showing up, mainly of Italian descent.

Snapshot Demographics

Lifestage: Lower Middle Age (35-54) Families; Kids <15
HH Size: Large (57% with >3 people)
Housing Type: Owned; Newer Single & Semi-Detached homes
Education: College (28%) & University (27%)
Job Type: Mixed. Service Sector (37%), Blue Collar (32%), White Collar (30%)
Commuting: Car
Ethnic Presence: Low (26% Immigrant Pop.); Italian
Language: English
Average HH Income: $103,182 (31% above average)

Source: PRIZM, Statistics Canada
Lifestyle Overview

The members of Provincial Families lead busy, kid-centered lives. They’re outdoorsy households who score high for activities like jet skiing, skateboarding, snowboarding and skiing. Many typically have one or two children who join teams to play hockey, soccer, football or baseball. They’re the Ontarians who spend their vacations hauling the kids to family-friendly attractions such as theme parks, zoos, aquariums or national parks; on weekends, they’re always looking for a bowling alley, video arcade or ice skating rink for some afternoon fun.

While Provincial Families are not the culture buffs found in more upscale groups, they do attend plays and dinner theatres at above-average rates. And the relatively young adults like to go out—if they can get a babysitter—to the occasional bar, comedy club or restaurant. Their kids would just as soon stay home where they can go on their computers, ride bikes and play with their pets; birds are especially popular among this group.

When it comes to travel, these families look to their own backyard: At this stage in their lives, they prefer short trips around Ontario than anywhere else in the world.

Source: PRIZM®. BBM RTS Canada
Travel Behaviour

With their sprawling families, this group prefers the convenience and variety that touring Ontario offers. Any season of the year, Provincial Families can be found vacationing in Toronto and other destinations in the province. However, they also make occasional forays throughout the year to other family-friendly locales: Niagara Falls, Banff, Ottawa, Quebec City, Northeastern U.S. and Southern U.S. In the summer, they may take the family by car to Prince Edward Island or Cape Breton Island, but that’s because it’s less costly than flying with several kids.

These Ontarians prefer to travel by car rather than plane or train, and they have above-average rates for renting vehicles from Enterprise, Hertz and Avis. Although they could afford more exotic locations, Provincial Families are not adventuresome travellers: They have relatively low rates for travelling abroad and they’ve yet to explore many far-off provinces, such as Saskatchewan, Northwest Territories and New Brunswick.

Although they’re not big media consumers—many are too busy to sit in front of a TV set—they do read magazines at decent rates, especially parenting, children’s, photography and men’s publications. And they do respond to direct advertising sent online—ever on the lookout for family travel specials. The vacation activities for this group are also family-centric for the most part. Water sports and fishing are amongst some of the aquatic vacation activities. While travelling, they’ll hit amusement parks, theme parks and aquariums for the kids, as well as engaging in active pursuits like beach volleyball. Golf is also popular, while mini-golf will get the kids going. The parents will also enjoy trips to wineries for tasting and the whole family will take in fireworks displays while on holidays.

Travel Motivations

Seek:

- **Time Savers:** Might respond better to time-saving packages and offers which are easy to choose as they are too busy to do the research and plan their own itineraries.
- **Group Travel:** They feel comfortable in crowds and would be open to packages and charters, as well as group tours and guided trips.
- **Family Vacations:** These family centric Ontarians will want family options. The “escape from the kids” approach is not for them as they will want inclusive travel options.
- **Status:** These consumers will want to show off the fact they are visiting the high-end “where-its-at” locations.
- **Spontaneity:** Their busy lives lead them to enjoy moments of relaxation when they can, often last minute or ad hoc. The availability of last minute trips, packages or specials would appeal to these consumers.

Avoid:

- **Ecology:** This group is not overly big on environmental conservation and ecology, so eco-tourism and “back to nature” travel is not necessarily to their taste.
- **Culture and History:** This group is weak on cultural sampling and multiculturalism. They prefer familiarity over discovery.
- **Personal Achievement:** These travellers do not need a sense that they took on a challenge to succeed. They already feel that the strong rise to the top. They would not respond well to a “push yourself to the limit” message.

Source: PRIZM+
BBM RTS Canada, TAMS
Media Overview
Provincial Families members are light media consumers who don't make much time in their busy lives for media consumption. They're light TV viewers, enjoying cartoons, comedy and sports programming, and tuning to cable networks like Comedy Network and Family Channel. During their commutes to work, they might have their radios tuned to classic rock and Top 40. They tend to prefer their local newspapers, reading up on what is happening where they live first. Their favorite magazines include Cosmopolitan, Food & Drink, Seventeen and Sports Illustrated. They are not big users of the Internet overall, though they have high-speed access at home and school, probably where the kids use it more than the adults.

Media Usage

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Provincial Families</th>
<th>Total Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV (Heavy)</td>
<td>32.31</td>
<td>27.62</td>
</tr>
<tr>
<td>Radio (Heavy)</td>
<td>31.48</td>
<td>31.49</td>
</tr>
<tr>
<td>Newspaper (Heavy)</td>
<td>21.94</td>
<td>19.22</td>
</tr>
<tr>
<td>Magazine</td>
<td>35.78</td>
<td>34.09</td>
</tr>
<tr>
<td>Internet Usage</td>
<td>60.50</td>
<td>64.11</td>
</tr>
<tr>
<td>Direct (Favourable)</td>
<td>61.87</td>
<td>58.50</td>
</tr>
</tbody>
</table>

Source: PRIZM 2®. BBM RTS Canada

Media Highlights

**Television:** Light viewers. Not big on commercials. Cartoons, NFL football, some other sports. Comedy Network, Family Channel, MuchMusic, Treehouse TV.

**Radio:** Light listeners. Mainstream, Top 40, classic rock, urban.

**Magazines:** Light magazine readers. Parenting, children’s, men’s, photography. Cosmopolitan, Food & Drink, Seventeen, Sports Illustrated, Today's Parent.

**Newspapers:** Light newspaper readers. More local dailies than national. Selected sections: front page, local news.

**Internet:** Average Internet users, with some high-speed access at home. Used more at school (probably by kids).

**Direct:** Less favourable towards direct mail, flyers and coupons.
Young Go-Gos

05 Young Digerati
13 Continental Culture
15 Electric Avenues
**Demographic Overview**

The Young Go-Gos group consists primarily of singles and couples under 35 years old and on their way up the ladder. Mainly university educated with well-paying jobs in white-collar professions and the service industry, their income of 16% above the provincial average and their single status afford them plenty of disposable income. They prefer living in older apartments, high-, low-rise or duplexes and close to the urban action, but they’re also a mobile group, with 17% having moved in the past year, almost 30% above the provincial average. With their in-town locations, more than half the residents commute to work without a car; 14% walk to their jobs. This urban group has a multi-ethnic flavour as more than a third are immigrants or children of immigrants.

**Snapshot Demographics**

| Lifestage: | Younger (25-44) Singles; No kids |
| HH Size:   | Small (73% with 1-2 people) |
| Housing Type: | Rental; Older Apartments - All Types |
| Education: | University (55%) |
| Job Type: | White Collar (48%), Service Sector (38%) |
| Commuting: | Public Transit, Walking, Bicycle |
| Ethnic Presence: | Strong (33% Immigrant Pop.); Chinese, Greek. Religion: Jewish |
| Language: | English and French |
| Average HH Income: | $91,492 (16% above average) |

**Geographic Overview**

**Distribution within Census Metropolitan Areas**

- Ottawa-Gatineau: 16.2%
- Kingston: 0.5%
- Toronto: 80.6%
- London: 0.7%
- Hamilton: 1.5%
- Kitchener: 0.1%
- Waterloo: 0.3%
- Cambridge: 0.0%
- Burlington: 0.1%
- Oakville: 0.3%
- Collingwood: 0.1%

**Distribution within Census Subdivisions**

<table>
<thead>
<tr>
<th>Census Subdivision</th>
<th>Target Group: Young Go-Gos</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
</tr>
<tr>
<td>Total</td>
<td>181,124</td>
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<tr>
<td>Toronto</td>
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<td>Ottawa</td>
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<td>Hamilton</td>
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<td>Mississauga</td>
<td>583</td>
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<tr>
<td>Oakville</td>
<td>512</td>
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<tr>
<td>Waterloo</td>
<td>467</td>
</tr>
<tr>
<td>Burlington</td>
<td>215</td>
</tr>
<tr>
<td>Collingwood</td>
<td>104</td>
</tr>
</tbody>
</table>

Source: PRIZM, Statistics Canada
Lifestyle Overview

Footloose and childless, members of the Young Go-Gos group seem to be constantly on the move. They enjoy nightlife and exhibit high rates for going to restaurants, comedy clubs, movies, plays and rock concerts. They’re body-conscious types who make time for exercise, especially Pilates, cycling, soccer and skiing; they’re 50% more likely than the general population to join health clubs. Around the house, they enjoy reading books, making gourmet meals and listening to music: jazz, classic rock and hot adult contemporary are favourite genres. But Young Go-Gos are more interested in making the urban scene to sample whatever is new and hot—from a film festival or art gallery opening to a jazz concert or outdoor theatrical production. Ecologically minded, they have high rates for going whale watching, hiking, backpacking and camping in national or provincial parks. These typically unmarried singles and couples also seek out venues that cater to the “unattached but looking.” They like to go to bars, nightclubs and dance clubs. And they score high for attending a variety of exhibitions on topics ranging from wine and books to travel and sex. During vacations, these eclectic travellers also like to check out historical sites, parks and city gardens.

Key Words

- Ecology
- Discovery
- Control
- Escape
- Spontaneous
- Originality
Travel Behaviour

It’s difficult to find a travel destination that Young Go-Gos don’t visit at above average rates. These upscale and unattached young people are more than twice as likely as average Ontarians to visit Africa, Asia, Europe and the United Kingdom. In Canada, they’re frequent visitors to Quebec, Nova Scotia, the Northwest Territories, Nunavut and the Yukon. They’ll take a getaway trip to the big city or other parts of Ontario any time of the year, but they do have other seasonal favorites. In the winter, they like going to some of Canada’s big cities—Montreal, Ottawa, Quebec City or Vancouver—in addition to warmer states in the U.S. In the spring and fall, they prefer Quebec, Nova Scotia and the Northeastern U.S. as well as destinations in British Columbia like Victoria, Whistler and Vancouver. In the summer, the list of high-ranking destinations grows longer, including the Western and Southern U.S., as well as all of Manitoba and B.C. Unlike more affluent suburban travellers, the urban-based Young Go-Gos economize frequently by renting cars, vans and trucks for their vacations. And they also look for discount fares and all-inclusive package tours, some travellers booking excursions by themselves, others using full-service agencies. But they are harder for marketers to reach through mainstream media. They’re lighter consumers of magazines and television, and they tend to listen to few radio stations other than those featuring news and fine arts programming. When they go on vacation, Young Go-Gos like to keep their days filled with all sorts of activities. It seems as though they will try almost anything to add to the enjoyment of their trips, and score high for participation on everything from extreme sports to fishing and bird-watching to attending cultural events. They will hit spas, take language courses, go skiing, swimming, biking - you name it, a Young Go-Go on vacation will probably give it a shot.

Travel Motivations

Seek:

- **Flexibility & Ecology:** They like to be in control. Give them options, but let them make choices. They are concerned about the environment and ecology and may respond well to “eco-options” for their travel choices.
- **Escape:** Travel mainly to get away from their everyday stresses and responsibilities. Want to have no worries or cares. Everything taken care of for them. This could be a simple massage at a spa, or an exotic trip. They embrace spontaneity so many escapes are last minute.
- **Originality:** They like new and interesting experiences, and like to differentiate themselves from the “pack”. The “uncharted” uniqueness of the destination may appeal.
- **Attention to Detail:** They appreciate and tend to respond more favourably to good aesthetics.

Avoid:

- **Nature:** This group likes to be active and is not drawn to the rustic purity and serenity of nature. They will enjoy activities like camping and hiking, but more for the escape value rather than the “nature experience”.
- **Security Concerns:** This group is not afraid of unknown or unfamiliar destinations. Do not need to emphasize “Canadian” instead focus on the uniqueness.
- **Brand Names:** These travellers are not likely to select based on brand or company name, instead examining the offer based on its merits and what appeals to them.

Source: PRIZM©, BBM RTS Canada, TAMS
Media Overview

The members of Young Go-Gos are selective media consumers with a preference for newspapers and the Internet. They’d rather participate in sports or go to music clubs than watch TV athletics or listen to music on the radio. But when going out isn’t an option, they enjoy watching news, soaps and documentaries; their favorite cable channels include Bravo!, Food TV and CBC Newsworld. And they tune their radios at home to classic rock and classical music. These hip singles like to stay abreast of the latest news, subscribing to newspapers and magazines that feature current affairs, entertainment and international news. But they’re bigger fans of the Internet, where they pursue a variety of activities such as accessing news and job sites and reading online magazines.

Media Usage

<table>
<thead>
<tr>
<th>Media</th>
<th>Total Market</th>
<th>Young Go Gos</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV (Heavy)</td>
<td>32.31%</td>
<td>25.86%</td>
</tr>
<tr>
<td>Radio (Heavy)</td>
<td>31.48%</td>
<td>24.49%</td>
</tr>
<tr>
<td>Newspaper (Heavy)</td>
<td>21.94%</td>
<td>26.55%</td>
</tr>
<tr>
<td>Magazine</td>
<td>35.78%</td>
<td>39.33%</td>
</tr>
<tr>
<td>Internet Usage</td>
<td>60.50%</td>
<td>72.27%</td>
</tr>
<tr>
<td>Direct (Favourable)</td>
<td>52.94%</td>
<td>61.87%</td>
</tr>
</tbody>
</table>

Source: PRIZM, BBM RTS Canada

Media Highlights


Radio: Light listeners, especially evenings. Classical/fine arts, classic rock, classic hits, jazz, news/talk, traffic reports.


Internet: Heavy Internet users, with high-speed cable and DSL access, at work, home and school. Access online job sites. Will use the Internet for shopping.

Direct: Unfavourable towards direct mail.
Retired Roamers

19 Rods & Wheels
25 Nearly Empty Nests
35 Grey Pride
39 Simple Pleasures
42 Heartlanders
Demographic Overview

The Retired Roamers group consists mainly of older married empty nesters (some widows and divorcees). With no children to support, members of this group are able to stretch their modest incomes. Education levels within this group are mixed; high school and trades certificates are above Ontario’s average and a quarter of this group has received a college education. Although many have retired, those still in the workforce are evenly distributed among white collar, service sector and blue collar jobs with a slight trend toward service sector and self-employment. You will likely find these folks driving to and from work, with only a few lucky ones being close enough to walk. The majority of this group own single detached homes away from the hustle and bustle of city living, however 27% are renters. These neighbourhoods are homogenous, with a low immigrant and ethnic population.

Snapshot Demographics

Lifestage: Mature (55+) couples without kids at home; some widowed (9%) and divorced (7%)
HH Size: Small (67% with 1 or 2 people)
Housing Type: Own older single-detached; 27% rent
Education: High School, Trades, College
Job Type: Mix Service Sector, White and Blue collar, Self Employed (13%)
Commuting: Car (88%), Walk (6%)
Ethnic Presence: Low (15% Immigrant Pop)
Language: English
Average HH Income: $64,838 (18% below average)

Geographic Overview

Distribution within Census Metropolitan Areas

<table>
<thead>
<tr>
<th>CMA/CA</th>
<th>Total</th>
<th>% Comp</th>
<th>% Pen</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toronto</td>
<td>21,398</td>
<td>3.63</td>
<td>2.10</td>
<td>16</td>
</tr>
<tr>
<td>London</td>
<td>18,007</td>
<td>3.05</td>
<td>11.71</td>
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<tr>
<td>Ottawa</td>
<td>24,481</td>
<td>4.15</td>
<td>7.27</td>
<td>56</td>
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<tr>
<td>Greater Sudbury</td>
<td>17,129</td>
<td>2.90</td>
<td>25.45</td>
<td>197</td>
</tr>
<tr>
<td>Kawartha Lakes</td>
<td>14,152</td>
<td>2.40</td>
<td>47.16</td>
<td>365</td>
</tr>
<tr>
<td>St. Catharines - Niagara</td>
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<td>2.18</td>
<td>22.79</td>
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<td>Kingston</td>
<td>12,172</td>
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<td>14.60</td>
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<tr>
<td>Peterborough</td>
<td>10,943</td>
<td>1.85</td>
<td>23.43</td>
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<tr>
<td>Windsor</td>
<td>10,686</td>
<td>1.81</td>
<td>11.66</td>
<td>90</td>
</tr>
<tr>
<td>Other</td>
<td>590,162</td>
<td>100.00</td>
<td>12.91</td>
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</table>

Distribution within Census Subdivisions

<table>
<thead>
<tr>
<th>Census Subdivision</th>
<th>Target Group: Retired Roamers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
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<tr>
<td>Total</td>
<td>590,162</td>
</tr>
<tr>
<td>Hamilton</td>
<td>24,760</td>
</tr>
<tr>
<td>Ottawa</td>
<td>24,481</td>
</tr>
<tr>
<td>Toronto</td>
<td>21,398</td>
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<tr>
<td>London</td>
<td>18,007</td>
</tr>
<tr>
<td>Greater Sudbury</td>
<td>17,129</td>
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<tr>
<td>Kawartha Lakes</td>
<td>14,152</td>
</tr>
<tr>
<td>St. Catharines</td>
<td>12,885</td>
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<tr>
<td>Kitchener</td>
<td>12,172</td>
</tr>
<tr>
<td>Thunder Bay</td>
<td>10,943</td>
</tr>
<tr>
<td>Windsor</td>
<td>10,686</td>
</tr>
</tbody>
</table>

Source: PRIZM©, Statistics Canada
Lifestyle Overview

Although they only have modest incomes, the Retired Roamers lead active leisure lives, centred around the outdoors close to home in their communities. Local theatres and community venues like small outdoor theatres in parks are more their style, rather than high-brow cultural events. They attend festivals at high rates and will be on the lookout for exhibitions, carnivals, fairs and markets. Crafts, such as, knitting and sewing and other more sedate activities are also popular, and these Ontarians will attend shows to learn the latest techniques and keep up to date on their hobbies. Also enjoying outdoorsy pursuits, this group tends to take in RV shows, garden shows and boat shows at above average rates, looking to be informed on their purchases of personal watercraft or trailers. When they decide to be active, Retired Roamers members will participate in winter sports like curling, skiing and snowmobiling, as well as such pursuits as bird-watching, fishing, hunting and boating. Surveys show that national and provincial parks are among their favourite places to enjoy the great outdoors and all the accompanying activities. These footloose Ontarians are likely to hop in their RV or hitch up their camper and get out to these parks and enjoy themselves as often as they can. They join golf clubs at above average rates, and like to watch auto and horse races as well as figure skating. And these seniors are not above gambling some of their modest incomes looking for a big payout on lotteries, where they spend at above average rates. A trip to a casino outside their home province would be a treat for them.

Key Words

- Economic
- Familiarity
- Nature
- Rational
- Nationalism
- Reluctant
Travel Behaviour

Despite their modest incomes, Retired Roamers members are fairly active travellers who enjoy vacationing mainly in North America, taking in Canada and selected areas of the USA. Nationalistic and big fans of nature, their destination lists include many of the most scenic areas in Canada. To get where they’re going, these economy-minded retirees often drive, and they have high rates for owning campers and RVs. When they do fly, it’s often with a discount carrier. They will go online to book their own airline and hotel reservations, bypassing costly full-service travel agencies.

If Retired Roamers consumers are going to leave the country, chances are they are going to Mexico to catch some sun and enjoy the rustic beauty, probably on a package or a charter, or maybe even a time-share. They will also try the warmer areas of the USA for their beach fix, especially in the winter.

Due to their retired status and mainly child-free households, their preferred destinations do not vary much according to the season, and they are always researching and planning their next trip. In the winter, these Ontarians will travel both East and West to such varied destinations as Victoria, Saskatchewan and Nova Scotia, as well as trying trips to warmer US destinations. In the fall and spring they follow the same patterns, with the Maritimes and Prairie provinces also high on their lists. In the summer they don’t score as high for far-flung destinations. Familiarity is important for them, as evidenced by their high rate of travel inside Canada.

When Retired Roamers go on vacation, they’re big fans of all kinds of fishing, depending on the season. They enjoy ice-fishing, sport fishing or salt-water fishing. Golfing is popular, and they will also take trips to golf resorts. Observing wildlife and getting close to nature is big for them, and they like to go camping in a wilderness setting. For a taste of culture, they’ll take in a dinner theatre performance.

Travel Motivations

Seek:

• **Nature:** These consumers are fans of the country life and will want to experience the great outdoors, rather than the big city. This mindset also reflects in their travel preferences.

• **Information:** These are consumers who will research their purchases before spending their hard-earned money. They will want as much information about their options and travel as possible before making their decisions.

• **Price:** They are concerned about their financial future and will look for ways to make their money work for them. Deals and offers will appeal to them and they will always look to get the most for their money.

• **Nationalism:** This group’s strong sense of being Canadian will lead them to look for options that will support their country. They think in terms of regions, and this reflects in their travel habits, so regional offers would appeal to them.

Avoid:

• **Emotional Offers:** This group will analyze and research their decisions, so rational, features and benefits offers will resonate better.

• **Global Appeal:** This group likes to be close to home and the “discover the world” message is not for them.

• **Big Brand:** These travellers are not skeptical toward small business and will feel more comfortable dealing with a smaller more personal company, as opposed to a large, faceless corporation.
Media Overview
Retired Roamers stay current with their community’s events and national news through a variety of media. Radios are frequently tuned to weather, news, community info and country music. Their televisions might be glowing with the familiar faces of CBC Newsworld and CTV Newsnet. When they are looking for entertainment they might change the channel to country music videos, a favorite game show or soap opera. These retirees are avid readers of their local papers as well as the Globe and Mail. They have the time to read the entire paper, although they might focus on the real estate, food or editorial sections. These traditionalists would rather turn the pages of a Canadian content magazine like Reader’s Digest, Maclean’s or Canadian Living than turn on their computers to surf the net. They appreciate flyers being delivered to their doors or inserted into their newspapers.

Media Usage

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Total Market</th>
<th>Retired Roamers</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV (Heavy)</td>
<td>32.31%</td>
<td>35.14%</td>
</tr>
<tr>
<td>Radio (Heavy)</td>
<td>31.48%</td>
<td>34.55%</td>
</tr>
<tr>
<td>Newspaper (Heavy)</td>
<td>21.94%</td>
<td>25.32%</td>
</tr>
<tr>
<td>Magazine</td>
<td>35.78%</td>
<td>38.55%</td>
</tr>
<tr>
<td>Internet Usage</td>
<td>54.35%</td>
<td>60.50%</td>
</tr>
<tr>
<td>Direct (Favourable)</td>
<td>61.87%</td>
<td>64.91%</td>
</tr>
</tbody>
</table>

Source: PRIZM, BBM RTS Canada

Media Highlights

Television: Moderate to heavy viewers. Game shows, suspense/crime drama, talk shows, soap operas/serial dramas, figure-skating. Court TV, CMT, Lonestar, History Channel, CBC Newsworld.

Radio: Strong listeners. Community information, country, mainstream rock, talk/phone in shows, news, weather.

Magazines: Average readers. Senior citizens, automotive, sports & recreation, gardening & homes, travel & tourism. Canadian Geographic, Reader’s Digest, Maclean’s, Canadian Living.

Newspapers: Heavy newspaper readers. Globe and Mail and local/community papers. Read most or all pages. Preference for real estate, classifieds, editorials and food sections.

Internet: Below average Internet users, with phone line access. Use at home and work.

Direct: Responsive to direct mail. Favorable towards flyers in newspapers and coupons delivered to their doors.
US MARKET
### US Target Groups Propensity to Travel to ON

<table>
<thead>
<tr>
<th>Description</th>
<th>Hhlds in States in Tier 1-3</th>
<th>%</th>
<th>Propensity to Travel in ON (Tier 1 &amp; 2)</th>
<th>Propensity to Travel in ON (Tier 3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Flyers</td>
<td>6,536,100</td>
<td>13.45</td>
<td>153</td>
<td>121</td>
</tr>
<tr>
<td>Footloose Families</td>
<td>3,061,462</td>
<td>6.30</td>
<td>138</td>
<td>112</td>
</tr>
<tr>
<td>Silver Streaks</td>
<td>4,288,088</td>
<td>8.83</td>
<td>150</td>
<td>96</td>
</tr>
<tr>
<td>Young &amp; Restless</td>
<td>4,789,761</td>
<td>9.86</td>
<td>91</td>
<td>136</td>
</tr>
<tr>
<td><strong>Total Target</strong></td>
<td><strong>18,675,411</strong></td>
<td><strong>38.44</strong></td>
<td><strong>134</strong></td>
<td><strong>118</strong></td>
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<tr>
<td>Non-Target</td>
<td>29,903,851</td>
<td>61.56</td>
<td>82</td>
<td>84</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>48,579,262</strong></td>
<td><strong>100</strong></td>
<td><strong>100</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

- 10% of US residents in Tier 1-3 travel to ON for pleasure
## US Target Groups Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Market Size</th>
<th>Demographics</th>
<th>Key Behaviours</th>
<th>Travel Motivations</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Flyers</td>
<td>Wealthy mix of older families and married couples without children at home</td>
<td>6,536,100 (13.45%) hhds</td>
<td>Selected States Tier 1-3</td>
<td>Middle aged (35-59) families and empty nesters</td>
<td>Europe, cruises, upscale hotels, golf/tennis resorts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Mix (34% 2 &amp; 46% 4+)</td>
<td>Frequent flyer programs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Own; newer single-detached</td>
<td>Online, small travel companies</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>College/University &amp; Post-graduate degrees</td>
<td>Plays, Dance performances</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>White collar professionals</td>
<td>Golf, Tennis, Racquetball</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Car</td>
<td>Attend Hockey, Basketball</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Low; some Asian</td>
<td>Read newspapers &amp; magazines</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$150,000+ (well above avg)</td>
<td>Use Internet</td>
</tr>
<tr>
<td>Footloose Families</td>
<td>Middle class households with large, younger families, working hard to live the American Dream</td>
<td>3,061,462 (6.30%) hhds</td>
<td>Selected States Tier 1-3</td>
<td>Younger Middle aged (35-54) families</td>
<td>Theme parks, all-inclusive resorts, ski resorts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Large (53% 3+ people)</td>
<td>Drive to destinations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Own; single-detached</td>
<td>Online booking, high on car rentals</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Some College, Associate &amp; Bachelor degrees</td>
<td>Movies, pop music concerts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Service Sector &amp; White collar</td>
<td>Baseball, soccer, biking</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Car</td>
<td>Zoos, campgrounds</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Average</td>
<td>Watch TV &amp; read some newspaper</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$50k-$100k (average)</td>
<td>Use Internet</td>
</tr>
<tr>
<td>Silver Streaks</td>
<td>Mature middle class married couples who have already raised their families some widows and widowers</td>
<td>4,288,088 (8.83%) hhds</td>
<td>Selected States Tier 1-3</td>
<td>Mature (45+) empty nesters; a few widows</td>
<td>Europe, Canada, domestic destinations, casinos</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td>Small (62% 2 or less)</td>
<td>Frequent flyers, drive, RV</td>
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<td></td>
<td></td>
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<td>Own; Older Single detached</td>
<td>Mid-scale and discount travel booking</td>
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<td></td>
<td></td>
<td></td>
<td>Bachelor &amp; Master’s Degrees</td>
<td>Movies, plays, concerts</td>
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<td></td>
<td></td>
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<td>White collar; Service Sector</td>
<td>Golf, walking, gym</td>
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<td></td>
<td>Car</td>
<td>Casinos, reading</td>
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<td></td>
<td></td>
<td>None</td>
<td>Read newspapers &amp; magazines</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$75k-$149k (above avg)</td>
<td>Basic Internet use</td>
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<tr>
<td>Young &amp; Restless</td>
<td>Well educated younger singles in smaller childless households</td>
<td>4,789,761 (9.86%) hhds</td>
<td>Selected States Tier 1-3</td>
<td>Younger (25-44) Singles; No kids</td>
<td>Domestic, North America, gambling, skiing, beaches</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Small (63% with 1-2)</td>
<td>Car rentals</td>
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<td></td>
<td>Mix (2/3 own &amp; 1/3 rent)</td>
<td>Online booking, discount travel booking</td>
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<td></td>
<td>College/University &amp; Post-graduate degrees</td>
<td>Plays, movie premieres</td>
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<td></td>
<td></td>
<td>White Collar</td>
<td>Jogging, biking, hiking</td>
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<td>Car</td>
<td>Bars, nightclubs</td>
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<td>Some Bike</td>
<td>Read newspapers and watch TV</td>
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<td>Low; Some Asian</td>
<td>Heavy Internet use</td>
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<td>$50k-$100k (average)</td>
<td>Small Groups</td>
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<td>Simplicity</td>
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<td>Ecology</td>
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<td></td>
<td>Boston et al, MA-NH</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Philadelphia, PA</td>
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</tbody>
</table>

**Selected States:** Tier 1-3

**Key Markets:**
- New York, NY
- Washington et al, DC
- Chicago, IL
- Boston et al, MA-NH
High Flyers

- 01 Upper Crust
- 03 Movers & Shakers
- 05 Country Squires
- 06 Winner's Circle
- 07 Money & Brains
- 08 Executive Suites
- 09 Big Fish, Small Pond
- 12 Brite Lites, Li'l City
Demographic Overview

High Flyers households are a mix of older families and married couples without children at home. With their university and post-graduate educations and high powered careers, these wealthy professionals have climbed the corporate ladder. Their busy work days are spent in white collar professions as engineers, financial specialists and lawyers. Their generous household incomes provide them the luxury of large, single-detached homes in the comfort and security of the suburbs. However, living outside of major cities typically requires workers in this elite group to spend thirty minutes to an hour commuting to the office. Although their neighbourhoods generally have a low ethnic presence, they do boast an above-average Asian population at 6%.

Snapshot Demographics

- **Lifestage:** Middle aged (35-59) families and empty nesters
- **HH Size:** Mix (34% with 2 people & 46% 4+ people)
- **Housing Type:** Own; newer single-detached
- **Education:** College/University & Post-graduate degrees
- **Job Type:** White collar professionals
- **Occupations:** Legal, Engineer, Financial Specialist
- **Commuting:** Car
- **Ethnic Presence:** Low; some Asian
- **Average HH Income:** $150,000+ (well above average)

Geographic Overview

Distribution of High Flyers within States Tier 1-3

<table>
<thead>
<tr>
<th>State</th>
<th>Count</th>
<th>% Comp</th>
<th>% Pen</th>
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<td>Cleveland et al, OH</td>
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<tr>
<td>St. Louis, MO</td>
<td>127,430</td>
<td>1.97</td>
<td>10.47</td>
<td>77</td>
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</table>

Source: PRIZM NE Neighbourhood Demographics
The affluent members of High Flyers may have high-powered careers, but they also make time for activities and athletic pursuits. They go out to restaurants, theatres and museums at high rates. They also live in luxury at home, gracing their fashionable houses with well-manicured gardens, installing the latest exercise equipment in their basement gyms and filling their family rooms with books, DVDs and music CDs—everything from classical to jazz to pop.

A mix of middle-aged families and empty-nesting couples, High Flyers members tend to be outdoorsy Americans who go camping, skiing, hiking and canoeing at high rates. They enjoy a variety of “members only” sports—golf, tennis and racquetball—played at health and country clubs. They’re also regular spectators at pro hockey, basketball and football games.

With their educated backgrounds and deep pockets, these Americans appreciate cultural offerings, attending plays, movies and dance performances at high rates. In the marketplace, they’re voracious consumers, buying products through stores, mail-order catalogues and online websites. But they also display a charitable streak and have high rates for donating money to arts causes, public television and other charities.

Source: PRIZM NE, Simmons 2006
Travel Behaviour

Members of High Flyers are consummate travellers. Canada, Switzerland, China, Jamaica—it’s difficult to find a destination that they don’t visit at high rates. More than a third have traveled to Europe and Asia. Nearly 30% have visited Canada in the last three years, and nearly the same number have gone on holiday in Mexico and the Caribbean. With their lofty incomes, High Flyers members have the money to travel in style. They exhibit high rates for staying in upscale hotels (Hyatts and Hiltons are popular), taking cruises or heading to golf and tennis resorts like Deerhurst and Blue Mountain. The couples in this group like to gamble and frequent the casinos in Las Vegas and Atlantic City as well as Niagara Falls and Windsor. Those with kids make a strong market for Disney resorts, Universal Studios and Ontario theme parks like the Canada’s Wonderland and Ontario Place. And many households enjoy a wide variety of activities while travelling to cities like Toronto and Ottawa: visiting science museums and aquariums, going to art galleries and comedy clubs and strolling through historic sites and downtown streets.

While members of this group belong to frequent flyer clubs at twice the national average, they also rent a lot of cars once they arrive at their destination. And these adventurous travellers not only like booking their travel online, they’re also willing to sign up for tours with obscure travel companies. Having the wherewithal to do as they please, they’re almost evenly divided between those who pursue vacations with organized activities and those who only want to relax and do nothing at all—preferably in an exotic international locations.

Travel Motivations

Seek:

• **Advertising and Brand:** These are brand conscious consumers who respond to slick and stimulating advertising. They enjoy advertising for its own sake, and will respond well to an established brand.

• **Spontaneity:** Their busy lives lead them to enjoy moments of relaxation when they can, often last minute or ad hoc. The availability of last minute trips, packages or specials would appeal to these high energy consumers.

• **Spiritual Journeys:** These consumers have a need to seek real life experiences in natural settings. They will be looking for journeys of discovery and enlightening experiences.

• **Open Minded:** These consumers have a less traditional outlook on things like families and gender roles. They like to rely on their gut reactions and the emotional feel of a destination.

Avoid:

• **Safety & Security:** This group is not afraid of going out into the world and exploring. They do not fear for their personal safety and appeals of this nature will fall on deaf ears.

• **All-in-one:** These consumers like to have control and options. Closed packages or inflexible itineraries will not be attractive to them.

• **Appearance & Image:** These factors are not big with these consumers, despite their trust in brand names. They are not going to worry about their appearance or the perception of their destination by others, but will be guided by their own feelings.
Media Overview

Members of the High Flyers group have a strong preference for print media and online resources. They like to stay current with a variety of newspapers including the Wall Street Journal and Washington Post. Even with their high powered careers and active lifestyles, High Flyers take the time to read the business, travel and fashion sections of the paper. Their magazine preferences lean more towards their hobbies and interests; travel, running, personal finance and health. The internet is one of the first places members of this tech savvy group look for information. They visit sites like Travelocity, Orbitz, Expedia and shop online. When the televisions or radios are on in these busy households, they maybe listening to news or sports updates or watching the US Open (tennis), The Masters (golf) and The History Channel.

Media Usage

<table>
<thead>
<tr>
<th>Media</th>
<th>1st Quintile (%)</th>
<th>2nd Quintile (%)</th>
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</thead>
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<tr>
<td>TV (Heavy)</td>
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<td>Radio (Heavy)</td>
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<td>Magazine (Heavy)</td>
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<td>Newspaper (Heavy)</td>
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<tr>
<td>Internet Usage (Heavy Home/Work)</td>
<td>25.37</td>
<td>42.71</td>
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</table>

Source: PRIIZM NE, Simmons 2006

Media Highlights

**Television:** Average viewers. Home & Garden, CNN, Fox, MSNBC, The History Channel, sports broadcasts.

**Radio:** Average listeners. News/talk, classical music, all sports, all news.

**Magazines:** Heavy magazine readers. Travel, business, food, sports type magazines. Runner’s World, Men’s Health, Kiplinger’s Personal Finance, The Economist, Fortune.


**Internet:** Heavy Internet users at home and work. Avid online shoppers and use internet as an information source.
Footloose Families

17 Beltway Boomers
18 Kids & Cul-de-Sacs
20 Fast-Track Families
29 American Dreams
Demographic Overview

The members of the Footloose Families segment are working hard to live the American Dream. These upper-middle-class households tend to consist of large, younger families. They raise their children in single detached homes of average value. Members of this segment may not be living in the most diverse areas, but there is an average presence of blacks and whites and higher rates of Hispanic/Latin and multi-race households. Their education levels are middle of the road, with some attending college but not completing their degrees and approximately one quarter receiving a Bachelor’s or Associate’s degree. Their careers are more likely to be in mid-level positions such as office administration or lower level sales positions. Their healthy salaries are likely enough to provide them and their families with good memories and a comfortable lifestyle.

Snapshot Demographics

Lifestage: Younger middle aged (35-54) families
HH Size: Large (53% 3+ people)
Housing Type: Own; single-detached
Education: Some College, Associate & Bachelor degrees
Job Type: Service Sector and White collar
Occupations: Sales, Office Administration, Mathematics/Computer
Commuting: Car
Ethnic Presence: Average; Higher presence of Hispanic/Latin and multi-race households
Average HH Income: $50,000-$100,000 (average)

Distribution of Footloose Families within States Tier 1-3

<table>
<thead>
<tr>
<th>Name</th>
<th>Count</th>
<th>% Comp</th>
<th>% Pen</th>
<th>Index</th>
</tr>
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<td>Minneapolis-St. Paul, MN</td>
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<td>9.73</td>
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<td>Washington et al, DC-MD</td>
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<td>98</td>
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<td>Indianapolis, IN</td>
<td>66,586</td>
<td>2.18</td>
<td>6.31</td>
<td>98</td>
</tr>
</tbody>
</table>

Source: PRIZM NE Neighbourhood Demographics

CONFIDENTIAL – Prepared by Environics Analytics – June 2007
Lifestyle Overview

The young and sprawling households of Footloose Families have energy to spare. They have high rates for participating in team sports like baseball, soccer and basketball as well as individual pursuits such as jogging, biking and aerobics. They like to travel as a family to beaches, lakes and campgrounds. And they’re overwhelmingly religious: nearly nine out of ten belong to a church, temple or synagogue.

These thriving households like to get out and about, packing their kids in vans and SUVs to visit zoos, bowling alleys, ice skating rinks and campgrounds. Displaying mainstream cultural sensibilities, they attend movies, plays and pop music concerts all at high rates. And they’ll occasionally splurge on tickets to a professional football or ice hockey game.

At home, these acquisitive families buy an impressive assortment of games, videos, CDs and athletic equipment. With their educated backgrounds, they also purchase plenty of books, educational toys and word games. Always upwardly striving, Footloose Families members are especially fond of self-help books.

Key Words

- Diversity
- Efficiency
- Memories
- Excitement
- Connections
- Uniqueness

Source: PRIZM NE, Simmons 2006
Travel Motivations

Seek:

- **Experiential:** Footloose Families consumers are looking for interesting experiences and meaningful moments. They like to apply their personal creativity to their vacation planning and come up with original ideas.
- **Multiculturalism:** These are consumers who will have an openness to the diverse cultures that make up society and would be open to learning more about the multicultural aspects of their destinations, including multicultural fairs, shows and events.
- **Time Savers:** This group feels a considerable time restraint as well as the need to regain control of their time. Time saving technology and vacations filled with a “get the most out of your time” message will appeal.
- **Crowds:** An attraction to crowds would indicate this group’s propensity to enjoy destinations where large groups gather, such as amusement parks, resorts and other such popular spots.

Avoid:

- **Relaxed Approach:** These consumers will not like the relaxed approach in sales and service, preferring order and an established moral code of conduct in their treatment.
- **Traditional Family:** Not fans of traditional family and gender roles, the depiction of the “All-American” family is not going to resonate with this group.
- **Small Groups:** There is less of a desire to be around smaller, close-knit groups. They will want to be involved with larger organizations and activities.

Travel Behaviour

The members of Footloose Families never met a theme park they didn’t like. These upscale households exhibit high rates for visiting the Disney parks and Six Flags facilities in the U.S. as well as Marineland and Science North in Ontario. And they like to stay at all-inclusive resorts that offer lots of organized activities for their kids. For a big getaway, they’ll take a winter trip to a ski resort like Snow Valley, Blue Mountain and Talisman.

With their sprawling families, these households tend to be value-conscious travellers who prefer domestic vacations to international excursions. Typically, they’ll head to warm-weather destinations, exhibiting slightly higher rates for travelling to Mexico and the Caribbean than to Canada, which 17% have visited over the last three years.

But they will travel to Ontario for rustic summer vacations, going fishing, camping, hiking and swimming in national and provincial parks. Compared to average Americans, they’re much more likely to go water skiing, boating and white water rafting during their holidays in Ontario.

To plan their excursions, Footloose Families tend to book their reservations over the Internet; they’re big fans of Travelocity, Expedia and Orbitz. And to get to their destinations, these economy-minded families often drive, with high rates for renting cars. When they do fly, it’s often with a discount carrier like Southwest.

Source: PRIZM NE Simmons 2006, Social Values, TAMS
Media Overview
The focus on children and raising a family is quite evident in the media selections of the Footloose Families segment. Television channels are kid friendly Disney Channel and Nickelodeon. On a Saturday night the convenience of a Pay-Per-View movie might win out over strapping the kids into the family van to rent a video. Although these households are light magazine readers they might pick up a publication that provides advice and commentary on parenting and family issues. When carting their children to practices and lessons they might be listening to the newest rock song or getting updates on the latest sports score. Online radio is popular with members of this hard working group. Although the internet might be used predominantly at the office, pop-up ads and emails containing product and service information are appreciated by this segment.

Media Usage

<table>
<thead>
<tr>
<th>Media</th>
<th>Footloose Families</th>
<th>Select States in Tier 1-3</th>
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</thead>
<tbody>
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<td>TV (Heavy)</td>
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<td>Radio (Heavy)</td>
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<tr>
<td>Newspaper (Heavy)</td>
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</tr>
<tr>
<td>Internet Usage (Heavy)</td>
<td>25.37</td>
<td>30.73</td>
</tr>
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</table>

Source: PRIZM, BBM RTS Canada

Media Highlights

**Television:** Average viewers. Disney Channel, Nickelodeon, ESPN, Pay-Per-View Movies. Malcolm In The Middle, Gilmore Girls, Nip/Tuck.

**Radio:** Average listeners. NBA basketball, ESPN Radio, adult alternative, modern rock.


**Internet:** Above average Internet users, especially at work. Favourable opinion of pop-up ads. Listen to online radio.
Silver Streaks

11 God's Country
14 New Empty Nests
15 Pools & Patios

21 Gray Power
26 The Cosmopolitans
39 Domestic Duos
Demographic Overview

The Silver Streaks group is comprised of mature couples who have already raised their families. These middle-class married couples (and a few widows and widowers) have many years of hard work behind them and are starting to look forward to their retirement. Members of this segment are well educated: 28% have a Bachelor’s or Master’s degree. And though they may be nearing the end of their careers, they are still earning above-average incomes in management, financial and office administration positions. Their commutes to work last between 15 and 45 minutes - a bit shorter than the other two target groups. Many live in very homogenous communities and still own older, detached homes of average value.

Snapshot Demographics

Lifestage: Mature (50+) empty nesters; a few widows & widowers
HH Size: Small (26% 1 person and 36% 2 people)
Housing Type: Own; Older Single detached homes
Education: Bachelor’s & Master’s degrees
Job Type: White collar; some Service Sector
Occupations: Financial Specialist, Office Administration, Management
Commuting: Car
Ethnic Presence: None
Average HH Income: $75,000-$149,999 (above average)

Geographic Overview

Distribution of Silver Streaks within States Tier 1-3

<table>
<thead>
<tr>
<th>State</th>
<th>Total</th>
<th>% Comp</th>
<th>% Pen</th>
<th>Index</th>
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<td>Cleveland et al, OH</td>
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<td>103,652</td>
<td>2.42</td>
<td>8.51</td>
<td>94</td>
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</tbody>
</table>

Source: PRIZM NE Neighbourhood Demographics
Lifestyle Overview

The members of Silver Streaks are entering their retirement years, but they're still healthy enough to lead active leisure lives. They keep fit by playing golf, walking and exercising at a gym. They enjoy activities organized by church groups, arts associations and unions, all of which they belong to at high rates. They have the time and financial wherewithal to attend sporting events; they particularly like watching professional football, college basketball and Indy car racing.

These maturing couples also enjoy relaxing at home, where they like to spend time gardening, doing needlework and reading—mysteries, business books, romance novels—the whole gamut. Although they dine out at high rates, they also enjoy entertaining people at home. Silver Streaks members are by no means sedentary Americans. They go out to movies, plays and concerts at high rates. Nearly a third took an adult education class in the last year. These frisky folks also enjoy gambling, whether it's playing a daily lottery or going to a casino. Surprisingly, more than a quarter of these young-at-heart households go online to play games at least once a month.

Key Words

- Brand
- Activity
- Familiarity
- Appearances
- Technology
- Options
Travel Behaviour

Silver Streaks households tend to be adventurous travellers. They enjoy crossing the Atlantic to visit countries like Greece, Germany and Ireland. But they also enjoy travelling domestically to California, New England and the Mid-Atlantic states. And about one in five visited Canada in the past three years.

For their Ontario vacations, Silver Streaks tend to pack their schedules with a range of activities. They like to play golf, swim and stroll around cities like Toronto and Ottawa for sightseeing. They have high rates for going to farmer's markets, museums, botanical gardens and free outdoor performances. And they’re willing to stay up late on holiday to go to plays, comedy clubs and fireworks’ displays.

In addition, members of Silver Streaks arrange vacations around places where they can gamble. These Americans are 60% more likely than the national average to gamble on riverboats and inside the casinos in Windsor, Point Edward and Niagara Falls.

Indeed, these seniors get around quite a bit. They belong to frequent flyer programs but also have high rates for travelling by ship, train, RV and car. They tend to stay in mid-scale and discount hotels—like Best Western, Red Roof Inn and Motel 6—but they’ll also spend the money on a golf/tennis resort. And while the stereotypical image is of seniors flocking to the same vacation haunts year after year, they tell pollsters that they like to go someplace new with each trip—to expand their horizons.

Travel Motivations

Seek:
- **Buying Experience:** The act of purchasing the package or trip is just as important to these consumers as what they are acquiring. Their faith in brand names also affects their experience.
- **Balance:** Silver Streaks are willing to balance quality vs. quantity. They will look for select trips and packages which cater specifically to their needs, as opposed to travelling and spending on just anything.
- **Appearance:** They are concerned about their appearance and looking good, as this is perceived as a measure of success. For example, they may look to resorts with dress codes or well-uniformed staff as a sign of quality.
- **Technology:** This group feels a certain excitement over the possibilities offered by new technology and may be willing to try new channels for booking and reservations.

Avoid:
- **Impulse:** This group will not buy on impulse, preferring to think their purchases through completely, so rational features and benefits will resonate better.
- **Mystery and Discovery:** This is not a group that is on the lookout for mysterious forces and unexplained phenomena. They are rooted in the “here and now” and believe in modern science. They will look for rational, real-world fun.
- **Time Savers:** These consumers like to take the time to consider their purchases and even create their own packages. Time saving or quick-fix options are not for them.

Source: PRIZM NE, Simmons 2006, Social Values, TAMS
Media Overview

Similar to the High Flyers group, Silver Streaks gravitate toward printed materials for their news and information. They are heavy magazine readers, enjoying a variety of hobby related periodicals – travel, golf and home entertainment. Their newspaper selections of The Wall Street Journal and The Washington Post reflect their high education levels. Silver Streaks will also use newspapers and magazines for information on upcoming documentaries, news specials and favourite television shows. Televised golf tournaments might grab the attention of this group. This traditional group will likely use the internet more for email and work related activities. However, they may enjoy the novelty of being able to search online for travel and financial information.

Media Highlights

Television: Average viewers. CNN, CNBC, news/documentaries, early evening news. Travel Channel, Dateline, 60 Minutes, Las Vegas, The Masters and LPGA Tour.

Radio: Slightly above average listeners. News/talk, classical music, jazz, big band, all sports radio.


Internet: Moderate/Light Internet users. Tend to use at work. Search for financial, car/hotel/plane information online.

Source: PRIZM NE, Simmons 2006
Young & Restless

04 Young Digerati
10 Second City Elite
13 Upward Bound
22 Young Influentials

23 Greenbelt Sports
30 Suburban Sprawl
41 Sunset City Blues
Demographic Overview

The younger (under 45 years old) singles of Young & Restless consists primarily of smaller, childless households. Very highly educated with well-paying jobs in white-collar professions—such as law, mathematics/computers and entertainment/sports - members of this cultured group have bright futures ahead of them. Without the responsibilities and costs of childrearing, members of this group have more disposable income to devote to their lifestyles. And they’re attracted to the amenities of the big cities, with an additional advantage being a short commute to work (a few even bike to their jobs). Approximately 60% of this group have successfully purchased their home, which is on par with the national average, and one third rent homes and apartments. This urban group has only a slight ethnic edge with 4% of the population being Asian.

Snapshot Demographics

Lifestage: Younger (25-44) Singles; No kids
HH Size: Small (63% with 1-2 people)
Housing Type: Mix (2/3 owners and 1/3 renters)
Education: College/University & Post-graduate degrees
Job Type: White Collar
Occupation: Mathematics/Computer, Legal, Arts/Entertainment/Sports
Commuting: Car; Some Bike
Ethnic Presence: Low; Some Asian
Average HH Income: $50,000-$100,000 (average)

Source: PRIZM NE Neighbourhood Demographics
Lifestyle Overview

The members of Young & Restless lead hip and fast-paced lifestyles, drawn to nightlife activities like moths to city streetlights. These on-the-prowl Americans have high rates for going to bars, dance clubs and restaurants. They’re big fans of the arts, attending plays, movies, dance performances and museum openings whenever possible. Many are early adopters who are quick to check out the latest film, nightclub and indie band.

With these singles still immersed in the dating scene, the members of Young & Restless devote time daily to staying in shape. They like to go jogging, biking, hiking and in-line skating all at relatively high rates. They also occasionally play tennis and other racquet sports at health clubs. But they rarely buy tickets to pro sporting events, preferring to play rather than watch sports; their only exceptions are pro ice hockey and baseball games, which they attend at average rates.

Because they typically live in cramped quarters, Young & Restless members spend a lot of leisure time away from home. They have low rates for cooking and gardening. For vacations, they’re just as likely to go to a big city as a lakeside beach or national park. While they exhibit high rates for backpacking, boating and camping, they show little interest in fishing or hunting.

On the rare occasions when they are at home, they can be found entertaining friends, listening to music—everything from country to hip-hop—and going online to play games, listen to online radio and shop. Internet mavens, more than eight in ten buy books, CDs and other products online.

Source: PRIZM NE, Simmons 2006
Travel Behaviour

The members of Young & Restless love the idea of travelling abroad; they just can’t afford it. Instead, these Americans have high rates for domestic travel, heading especially to Florida, the Colorado Rockies and beaches along both coasts. Many like to travel to other North American destinations, and about 20% have visited Canada and Mexico over the last three years.

As for their favourite vacation activities in Ontario, they run the gamut: This group loves to go skiing at resorts like Blue Mountain, Mount St. Louis and Glen Eden. In the summer, they pack up their SUVs to go camping, hiking and canoeing in parks like Algonquin, Point Pelee and St. Lawrence Islands. And many are content to head to lively cities like Toronto, Stratford and Kitchener for the theatre festivals, jazz concerts, art galleries and nightlife.

As price-sensitive travellers, Young & Restless members frequently use the Internet to book their travel and prefer to stay at affordable hotels like Days Inn, Comfort Inn and Best Western. And with a relatively low incidence of car ownership, they also tend to rent vehicles for travel, especially from low-priced car rental companies like Budget and Enterprise. But they’re also open to travel by other means, and they have high rates for taking buses and trains to travel through Ontario.

Travel Motivations

Seek:
- **Small Groups:** These singles and childless couples will enjoy getting out on trips with smaller groups of friends or co-workers and experiencing a more intimate setting.
- **Experiential:** They are looking for interesting experiences and meaningful moments. They like to have control over their options and choose their own path.
- **Simplicity:** These consumers are fans of familiarity and keeping it simple and predictable. They will return to previously visited destinations and well-known spots.
- **Ecology:** There is a strong feeling of environmental protection in this group. They do not believe in sacrificing the environment for economic advancement. They will look for travel options which preserve and protect the environment.

Avoid:
- **Traditional Advertising:** There is a lack of confidence in advertising in this group, which would lead them to trust the less traditional sources for their vacation information, such as word of mouth or Internet “buzz”.
- **Brand Names:** They do not place a large emphasis on brand name, and will look at the individual merits of a service or product regardless of the label or company.
- **Community:** These travellers are not overly interested in their community and being involved in local affairs. They will not participate in community events as much, nor will they read community newspapers or other forms of communication.

Source: PRIZM NE, Simmons 2006, Social Values, TAMS
Media Overview

Members of the busy Young & Restless group are likely plugged into their MP3 players and computers rather than television and radio stations. Their up-and-coming status requires them to read a wider variety of newspapers. On the weekends you might find members of these households flipping through the *New York Times* or *Washington Post*. A few critical magazines like *The Economist* and *Vanity Fair* might make it onto their coffee tables. Their busy social lives make television less of a priority, but when they need a quiet evening at home they might turn on E! Entertainment TV or *America’s Next Top Model*. Internet use for this digital segment is above average. They bank online, stay current with instant news and information updates through online radio, newspapers and magazines.

Media Usage

<table>
<thead>
<tr>
<th></th>
<th>Young &amp; Restless</th>
<th>Select States in Tier 1-3</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV (Heavy)</td>
<td>38.53</td>
<td>38.68</td>
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<tr>
<td>Radio (Heavy)</td>
<td>39.23</td>
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<td>Magazine (Heavy)</td>
<td>40.06</td>
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<tr>
<td>Newspaper (Heavy)</td>
<td>40.81</td>
<td>43.43</td>
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<tr>
<td>Internet Usage (Heavy Home/Work)</td>
<td>25.37</td>
<td>29.58</td>
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</tbody>
</table>

1st Quintile = Heavy

Source: PRIZM NE, Simmons 2006

Media Highlights

**Television:** Average viewers. Style TV, hockey, Bravo, E! Entertainment TV. *America’s Next Top Model, Entertainment Tonight, The Amazing Race.*

**Radio:** Average listeners. Alternative radio, World Series baseball, Super Bowl, all news radio.

**Magazines:** Average magazine readers. Travel, science/technology, food, women’s fashion type magazines. *New Yorker, Vanity Fair, Self, Shape, Travel & Leisure, The Economist.*


**Internet:** Frequent Internet users. Listen to online radio, read internet magazines and newspapers.
OTMPC’s Ontario Segments vs. CTC’s EQ Segments
# OTMP’s Ontario Segments vs CTC’s EQ Segments

## OTMP’s Ontario Segments vs CTC’s EQ Segments

<table>
<thead>
<tr>
<th>ON Tourism Segment</th>
<th>Measure</th>
<th>OTMP</th>
<th>Proportion</th>
<th>CTC’s EQ Segments</th>
<th>Proportion</th>
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<tbody>
<tr>
<td>Upscale Adventurers</td>
<td>Population</td>
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<td>Retired Boomers</td>
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<td>Young Go Gals</td>
<td>Population</td>
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<td>Retired Boomers</td>
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<tr>
<td>Total</td>
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<tr>
<td></td>
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<td>403,905</td>
<td>6.6%</td>
<td>425,309</td>
<td>7.0%</td>
</tr>
</tbody>
</table>

- OTMP can leverage CTC’s EQ segments and tailor product and services based on Experiences to OTMP’s segments.

Note: CTC segments are not uniquely assigned to PRIZM clusters. Some clusters appear multiple times accounting for the higher totals.
OTMP can leverage CTC’s EQ segments and tailor product and services based on Experiences to OTMP’s segments

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