



ONTARIO
Yours to discover

Ontario Segmentation Refresh

July 2009

Catherine Pearson

Vice President

416-969-2835

catherine.pearson@environicsanalytics.ca

Emily Anderson

Senior Associate

416-969-2861

emily.anderson@environicsanalytics.ca





Objective

To update OTMPC's existing custom segmentation system to capture the most recent changes in demographics, behaviours and attitudes in Ontario. The update will include:

- Identifying, locating and quantifying the segments in ON
- Refreshing the personification of the segments

Background

OTMPC's custom segmentation system captures Ontario residents who travel in Ontario.

Historically four target segments have been identified in Ontario and described:

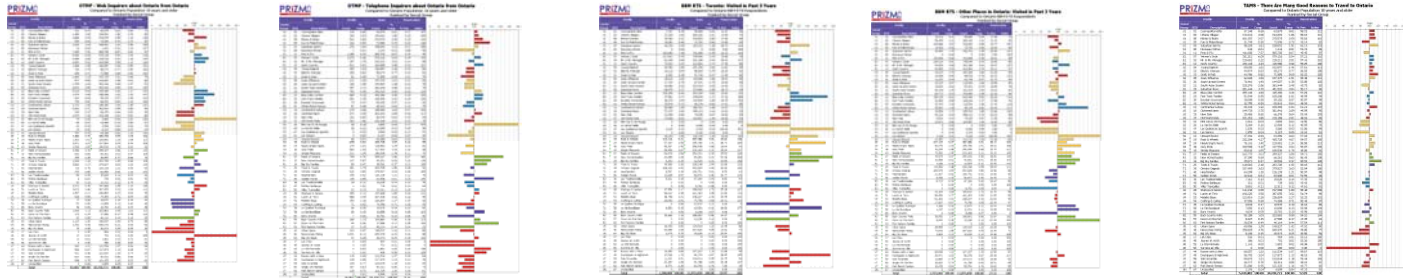
- Adventurers
- Fun-Loving Families
- Retired Roamers
- Young Go-Gos



OTMPC Web and Telephone Inquiries

BBM RTS ON Respondents linked to PRIZM C2

TAMS ON Respondents linked to PRIZM C2



Update "Target Groups" based on similarities among strong clusters

Adventurers

02 Urban Villagers, 07 Suburban Gentry, 07 Winner's Circle, 08 Money & Strains, 10 Mr. & Mrs. Manager

Fun-Loving Families

11 Pets & PCs, 12 God's Country, 14 Upward Bound, 22 Blue-Collar Comfort, 23 Fast-Track Families, 41 White Picket Fences

Retired Roamers

19 Kids & Wilsons, 24 Nearly Empty Nests, 38 Grey Pride, 43 Simple Pleasures

Young Go Gos

13 Continental Culture, 15 Electric Avenue, 31 Grads & Yards

Refresh the Target Segments using PRIZM-Linked Data

Imaging: Bring your Target Groups to Life

Use **response analysis** to continually learn and fine-tune targeting and communications strategies

Reach them with the best media *and* message

Direct Mail:
Addressed and Unaddressed

Targeted E-Mail Blasts

Promotions
in markets

Mass Media
with a targeted message



Data Sources



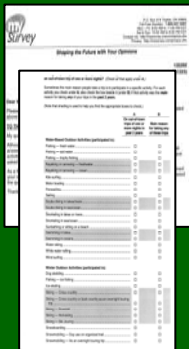
ON Respondents (2008)

- Visited in the Past 3 Years:
 - Niagara Falls
 - Toronto
 - Ottawa
 - Other in Ontario



ON Residents only

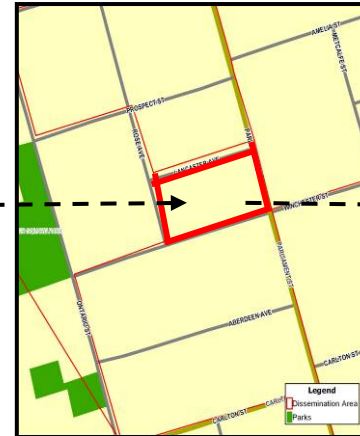
- OTMPC Inquiries between January 2007 and May 2009
- Telephone Inquiries
 - Web Inquiries



TAMS ON Respondents (2006)

- Visited in the Past 2 years:
 - Ontario
 - Northern Ontario
 - Southern Ontario
- Many good reasons to travel to ON
- Found ON Appealing
- Frequency of Trips to ON

Six digit postal code





- 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. System has been updated in January 2009 to capture the most recent demographic, behavioural and attitudinal changes
- Allows marketers to tailor products, services and craft messages that will resonate with their target market

	01 Cosmopolitan Elite Prosperous Parents F5 U1 Urban Elite	20 Asian Up-and-Comers Maturing Diversity F6 S2 Suburban Upscale Ethnic	40 Heartlanders Later Years M3 T1 Town Midscale
Description	Very wealthy middle-aged and older families	Successful, middle-aged Asian families	Mature, working-class town couples
Age	Middle-Aged & Older	Middle-Aged	Mature
Housing Tenure	Homeowners	Homeowners	Homeowners
Education	University	University/High School	Grade 9/High School/Trade
Job Type	White Collar	Service Sector & White Collar	Service Sector & Blue Collar
Ethnic Presence	Medium	High	Low
Sample Social Value	<i>Discriminating Consumerism</i>	<i>Cultural Fusion</i>	<i>Importance of National Superiority</i>
Preferences	Ballet/opera/symphony Golf equipment Business and finance magazines European wine \$500,000+ in securities and savings	Galleries/museums/science centres Digital cameras Book travel online Fish and seafood Toyota	Gardening Sears catalogue Golden oldies radio Bacon Canada Savings Bonds

Captures

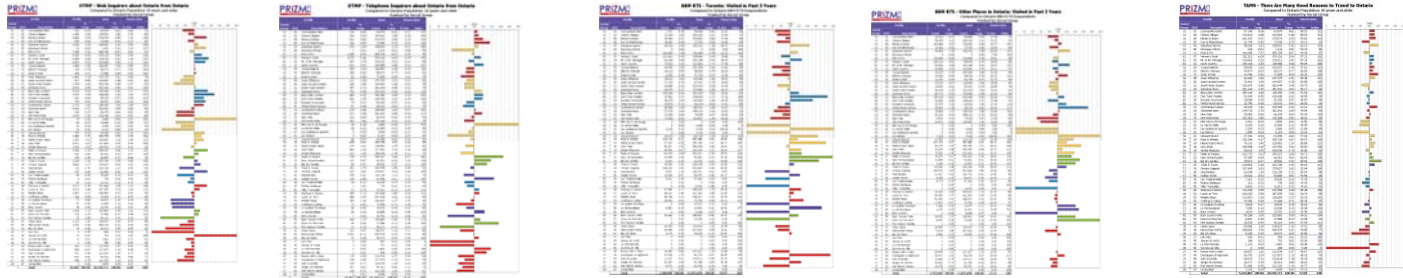
- Socio-economic status (not just income e.g. retirees with fixed income but high disposable income)
- Regionality
- Ethnic Diversity
- Urbanity
- Demographic changes
- Behaviours
- Attitudes/mindsets



OTMPC Web and Telephone Inquiries

BBM RTS ON Respondents linked to PRIZM C2

TAMS ON Respondents linked to PRIZM C2



Update "Target Groups" based on similarities among strong clusters

Adventurers

02 Urban Villagers, 07 Winner's Circle, 08 Money & Strains, 10 Mr. & Mrs. Manager

Fun-Loving Families

11 Pets & PCs, 12 God's Country, 14 Upward Bound, 22 Blue-Collar Comfort, 23 Foot-Track Families, 41 White Picket Fences

Retired Roamers

19 Kids & Wives, 24 Nearly Empty Nests, 38 Grey Pride, 43 Simple Pleasures

Young Go Gos

13 Continental Culture, 15 Electric Avenue, 31 Grads & Yaks

Refresh the Target Segments using PRIZM-Linked Data

Imaging: Bring your Target Groups to Life

Use **response analysis** to continually learn and fine-tune targeting and communications strategies

Reach them with the best media *and* message

Direct Mail:
Addressed and Unaddressed

Targeted E-Mail Blasts

Promotions in markets

Mass Media with a targeted message



Adventurers



Well-off older middle-aged married couples with adult-age children & some empty nests

Fun-Loving Families



Well-off younger and middle-aged suburban and exurban families with lots of children

Young Go-Gos

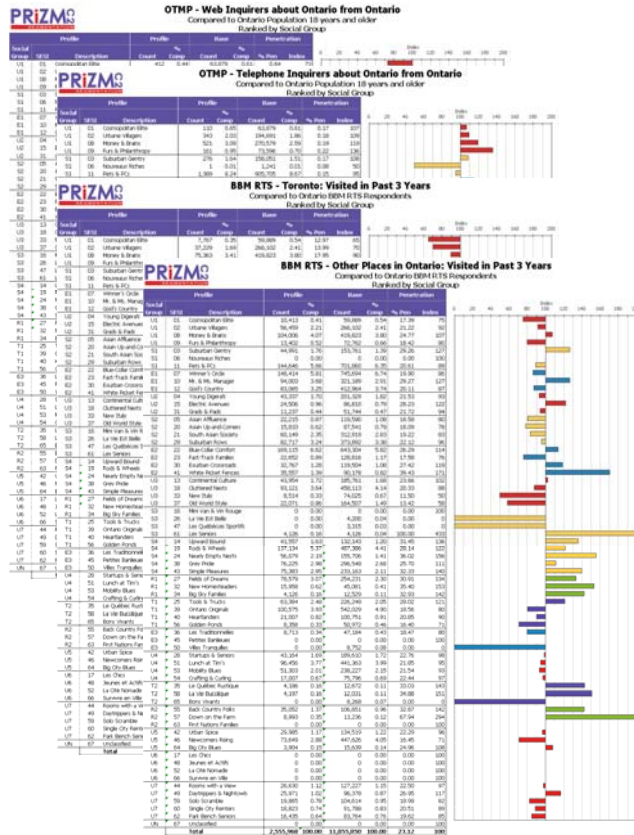


Young successful, well-off, multi-ethnic urban trendsetters

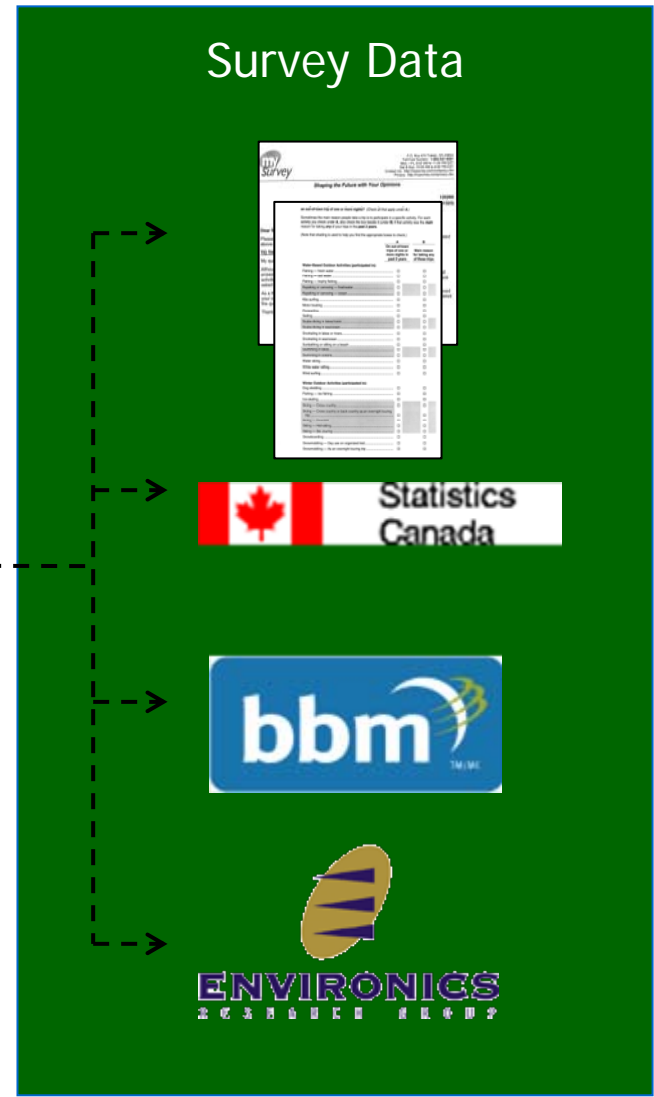
Retired Roamers







Midscale mature and older retirees and seniors living in suburbia and towns



New profiles capture changes in demographics, geography and travel behaviours





	 Adventurers	 Fun-Loving Families	 Retired Roamers	 Young Go-Gos
Size (#, % of ON HHds)	779,349 (15.57%)	919,817 (18.38%)	542,871 (10.85%)	148,398 (2.97%)
Demographic Summary	Established families with teens Upper-middle-class/affluent Moderate Chinese presence Live in/near major cities Ottawa, Toronto, Mssg., Markham	Younger families, school-age kids Middle/upper-middle class Mod. South Asian presence Suburbs/exurbs of major cities Ottawa, Brampton, Mssg., Vaughan	Empty-nested retirees Midscale, some fixed incomes Low In/near smaller cities Hamilton, Ottawa, London, Sudbury	Singles and couples Just starting out (wh. collar) Moderately diverse Cities near big universities Toronto, Ottawa, London, Kingston
TAMS Travel Behaviour - Past 2 Yrs	<i>% of Sample, Index</i>	<i>% of Sample, Index</i>	<i>% of Sample, Index</i>	<i>% of Sample, Index</i>
Visited ON	18.55% (108)	21.45% (109)	12.19% (109)	2.63% (106)
Northern ON	18.07% (98)	22.66% (115)	13.36% (118)	2.81% (88)
Southern ON	20.36% (110)	21.64% (110)	11.85% (104)	3.64% (114)
Avg # of Trips to ON (#, Index)	3.72 (102)	3.61 (99)	3.87 (106)	3.75 (103)
"Many Good Reasons to Travel to ON"	19.16% (112)	19.28% (98)	11.82 (104)	2.87 (115)
BBM Travel Behaviour - Past 3 Yrs				
Visited Toronto	18.13% (92)	24.10% (120)	13.36% (116)	2.54% (64)
Visited Ottawa	22.41% (114)	19.28% (96)	11.68% (101)	4.83% (122)
Visited Niagara Falls	20.54 (104)	22.21% (110)	10.47% (91)	4.39% (111)
Visited Cottage Country	23.17% (118)	21.73% (108)	10.39% (90)	5.87% (123)
Visited Other Ontario	19.76% (101)	20.71% (103)	14.31% (124)	3.85% (97)
Who they Travel With				
With Kids 15 and Under	12%	8%	12%	6%
With Kids 16 and Over	2%	2%	3%	20%
As a Couple	32%	27%	36%	38%
With Friends	42%	54%	39%	31%
Just Me	12%	9%	10%	5%
Web Inquiries	18.84% (110)	22.31% (113)	11.88% (105)	2.76% (111)
Phone Inquiries	17.99% (105)	20.86% (106)	10.19% (90)	2.16% (87)



Core Clusters

<p>02 Urbane Villagers</p> <p>Prosperous Parents F3</p> <p>U1 Urban Elite</p>	<p>03 Suburban Gentry</p> <p>Middle-Aged Achievers F3</p> <p>S1 Suburban Elite</p>	<p>05 Asian Affluence</p> <p>Prosperous Parents F5</p> <p>S2 Suburban Upscale Ethnic</p>
<p>07 Winner's Circle</p> <p>Middle-Aged Achievers F3</p> <p>E1 Exurban Elite</p>	<p>08 Money & Brains</p> <p>Prosperous Parents F3</p> <p>U1 Urban Elite</p>	<p>10 Mr. & Ms. Manager</p> <p>Middle-Aged Achievers F3</p> <p>E1 Exurban Elite</p>

Include for Tactical Reach

<p>01 Cosmopolitan Elite</p> <p>Prosperous Parents F5</p> <p>U1 Urban Elite</p>	<p>04 Young Digerati</p> <p>Starter Nests Y2</p> <p>U2 Urban Young</p>
--	---

15.6% of Ontario Households (779,349)
 17.1% of Ontario Total Population (2,259,709)
 17.1% of Ontario 18+ Population (1,786,802)
 17.2% of Ontario 15+ Population (1,893,148)
 17.3% of Ontario 12+ Population (1,985,350)

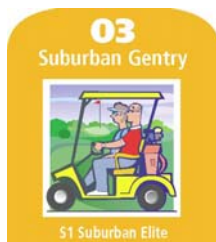


Target Group Highlights

- These wealthy, well established families like to get active, stay fit and soak up culture
- They enjoy a few long distance trips a year with their children, and some quiet weekends away for two
- Many of their trips are researched via the internet and the mail they receive; regardless of the type of trip they tend to be big spenders
- They are found in and around large cities in Southern Ontario, in places like Ottawa, Toronto, Markham, Oakville, and Burlington
- Their best media are daily newspapers and the internet



2007 PRIZM CE Clusters

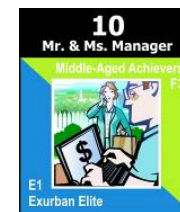
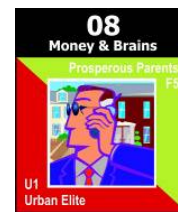


Total Size in 2007: 558,366 HHs

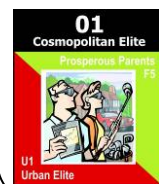
Overview of Changes (More to Come):

- Size in market has increased (11.6% to 15.6% of ON HHs)
- More families with kids of all ages, fewer empty/emptying nests
- Expanded presence in suburbs
- Different ethnic groups: more Chinese/South Asian presence, less Southern European presence

PRIZM C2: Stayed the Same (429,526 HHs)



PRIZM C2: Added to Target Group (349,823 HHs)



← Previously unassigned



From Young Go-Gos →



← From Fun-Loving Families

PRIZM C2: Removed from Target Group (132,723 HHs)



Total Size in 2009: 779,349 HHs



- Size in market has increased (11.6% to 15.6% of ON HHs)
- Expanded presence in suburbs – slight decrease in Toronto proper
- More families with kids of all ages, fewer empty/ emptying nests
- Different ethnic groups: more Chinese/South Asian presence, less Southern European presence

Key Similarities between 2007 and 2009 Segments

Demographics:

- Average household incomes exceed the average by 50%-60%
- Contain many ethnic households and neighbourhoods, with a strong presence of Chinese
- Similar presence across Ontario: top CSDs include Toronto, Ottawa, Mississauga, London

Social Values:

- Strong vitality, active adventurers
- Aesthetics continue to be important, strong consumers
- Price is not a factor in their purchase decisions

Travel and Leisure

- Strong for cultural and historical attractions
- Enjoy outdoor activities like golf, downhill skiing
- Balance travel within Canada with international destinations

Media

- Best media continue to be newspapers and the internet

Key Differences between 2007 and 2009 Segments

Demographics:

- 2009 TG's households are larger, much more likely to contain households with children than in 2007
- Higher proportion of children age 25+ living at home (4.6% in 2007 vs 12.2% in 2009)
- Group is 10,000 smaller in Toronto in 2009: loss of #17 is mostly compensated by addition of #1 and #4

Social Values:

- 2009 group is much more adaptable to complexity than in 2007
- Seeking experience but will save on principle

Travel and Leisure

- 2009 group also interested in family attractions like theme parks (lower proportion of empty nesters)
- Couples weekend getaways
- More travel within Ontario (Ottawa and Cottage Country are popular); travel to West still strong but has moderated

Media

- Internet use is even stronger in 2009 households, due partially to the presence of "millennial" children



Demographic Highlights

Lifestage: Middle-aged and older (45-64 years) couples with young adult (18-24 years) children

HH Size: Large; 40% with 4+ people (43% greater than average)

Housing Type: Owners; single-detached houses or low-rise condos built in the 1980s and early 1990s

Education: 36% have a university degree

Job Type: White collar; above average for business finance administration (14%), management (10%), social sciences (7%), sciences (6%); average for sales and service (15%)

Commuting: 85% drive (7% greater than average)

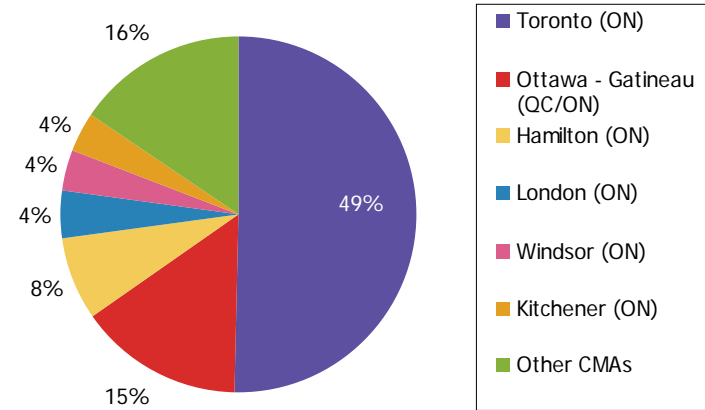
Diversity: Average at 30%; Visible minorities include Chinese (8%) and South Asian (6%)

Average HH Income: \$142,409 (61% greater than average)

Lifestyle Overview

Adventurers are well-off, highly educated established families living in and near Ontario's major cities. Their high incomes afford them the opportunity to lead lives full of activity. By day they are successful managers and business and finance administrators, but at night, on the weekends and on holiday they like to spend their time keeping fit and soaking up culture. This group's favourites include cultural events like theatre and art galleries, trade shows and all sorts of expos like auto and boat shows, and live professional sports events, particularly tennis and baseball. Fitness is important to them, and they enjoy working up a sweat with a game of tennis or an afternoon at the ski slope. It's no surprise then that their garages are filled with toys, including newly-purchased skis and golf equipment.

Top Census Metropolitan Areas (CMAs)



Top Markets – Census Subdivisions

Name	Target Group		Market		Penetration	
	# of HHds	% of Mkt	# of HHds	% of Mkt	% Pen	Index
Toronto (ON)	191,196	24.53	1,062,592	21.23	17.99	116
Ottawa (ON)	105,911	13.59	352,502	7.04	30.05	193
Mississauga (ON)	52,626	6.75	236,070	4.72	22.29	143
Hamilton (ON)	27,407	3.52	211,923	4.23	12.93	83
London (ON)	28,759	3.69	158,312	3.16	18.17	117
Brampton (ON)	18,722	2.40	148,690	2.97	12.59	81
Windsor (ON)	7,519	0.96	94,481	1.89	7.96	51
Markham (ON)	36,204	4.65	94,323	1.88	38.38	246
Kitchener (ON)	7,452	0.96	88,303	1.76	8.44	54
Vaughan (ON)	17,687	2.27	84,771	1.69	20.86	134
Legend	Low Index (I<80)			High Index (I>120)		



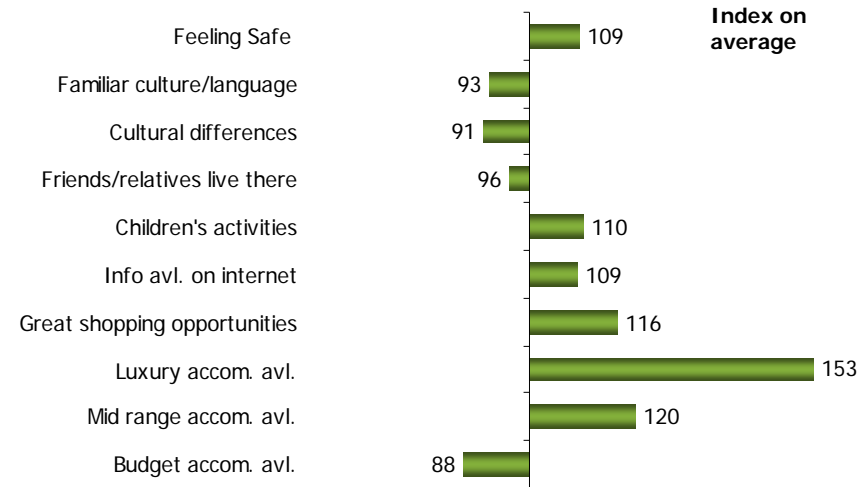
Travel-Oriented Social Values

Key Travel-Related Social Values			
Value	Index	Value	Index
Adaptive Navigation	101	Importance of Price	90
Aversion to Complexity	90	Need for Escape	96
Canadian Identity	103	Need for Status Recognition	99
Confidence in Advertising	105	Penchant for Risk Taking	97
Confidence in Big Business	112	Primacy of the Family	96
Confidence in Small Business	88	Pursuit of Originality	109
Control of Destiny	105	Pursuit of Novelty	110
Cultural Fusion	109	Risk Aversion	89
Ecological Lifestyle	98	Search For Roots	67
Financial Concern Re Future	74	Technological Anxiety	81
High Index (110+)		Low Index (90/less)	

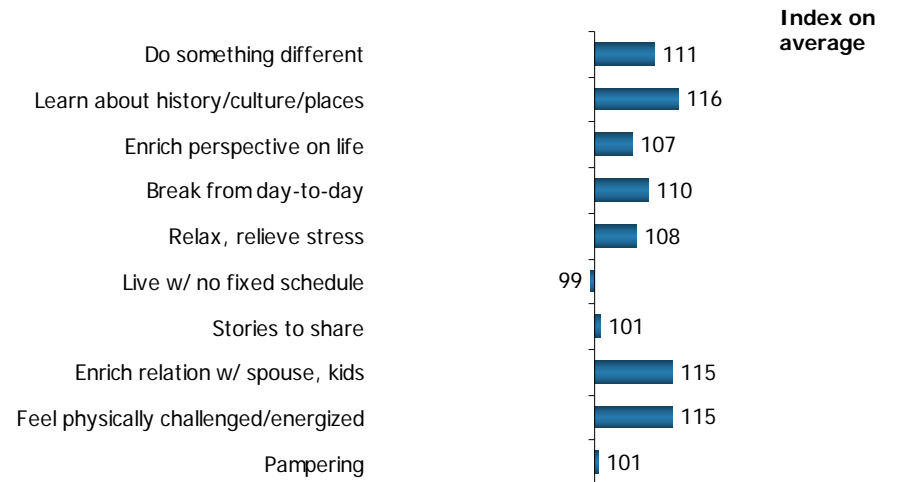
Social Values Overview

When deciding how to spend their leisure or vacation time, these families are likely to seek out opportunities to learn about new and different cultures, and to incorporate that learning into their everyday lives. These families have an energetic, lively approach to live and are attracted to experiences that are intensely enjoyable and satisfy their detail-orientation. This group enjoys buying big ticket items and going on expensive trips, but also is likely to save money on principle. This appears contradictory, but it is evident that these Adventurers tend to rationalize their big-spending ways as helpful to their overall state of well-being. They are not particularly attracted to nature, but enjoy the stimulation of crowds and learning about new cultures, and tend to seek out experiences where they can maximize time with each other, sharing new tastes and experiences.

Vacations – Conditions Sought



Vacations – Benefits Sought



Source: Environics Research, TAMS



Personal Travel Highlights

Type of Trip: Couples' weekend getaways, longer trips (1-2 weeks) to a variety of far-away destinations with the kids in tow

Destinations: Europe, major Canadian and American cities (in particular Ottawa), cottage country

Travel Mode: Air for long-distance travel – but the family SUV works great for long-weekend getaways

Accommodation: B&Bs, all-inclusives, hotels and cottages

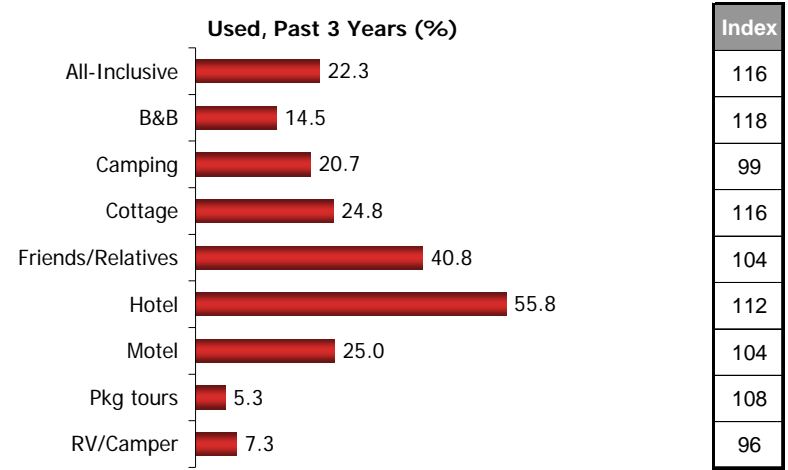
Activities/Attractions: Museums, cultural and athletic shows and events, historic and architectural sites, theme parks

Expenditure: Big spenders on travel in general, whether on a long-weekend getaway or a two-week holiday

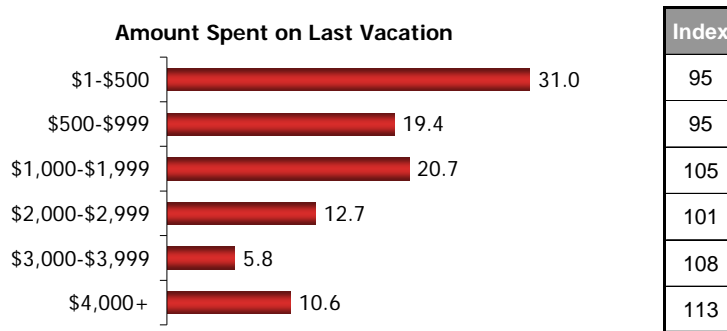
Seasons: A few big trips a year – winter and summer

Information Sources: Travel websites and guidebooks, friends and relatives, maps, and past experience. More likely than average to use official travel guides.

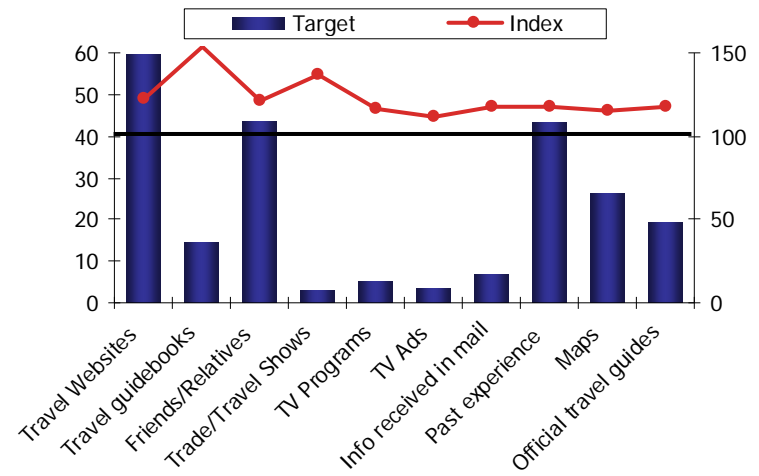
Travel Accommodation



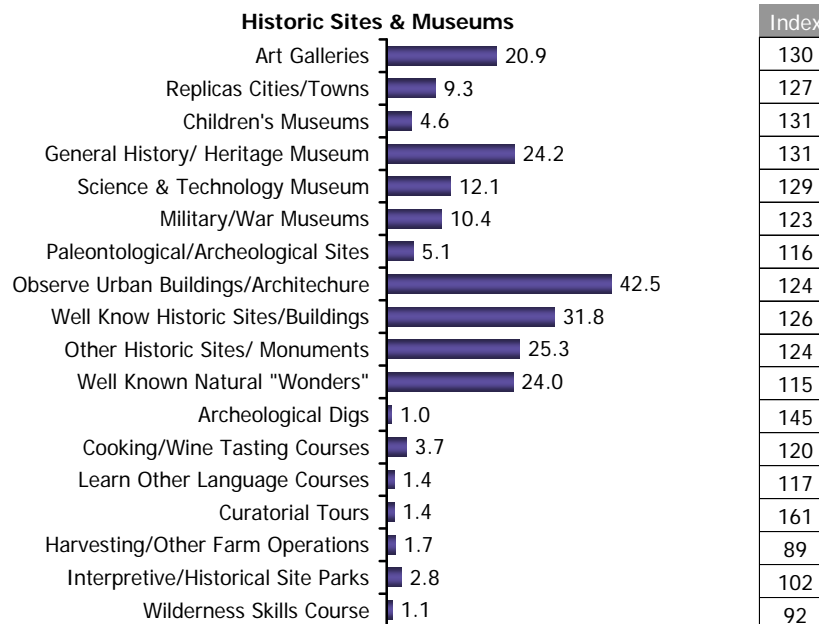
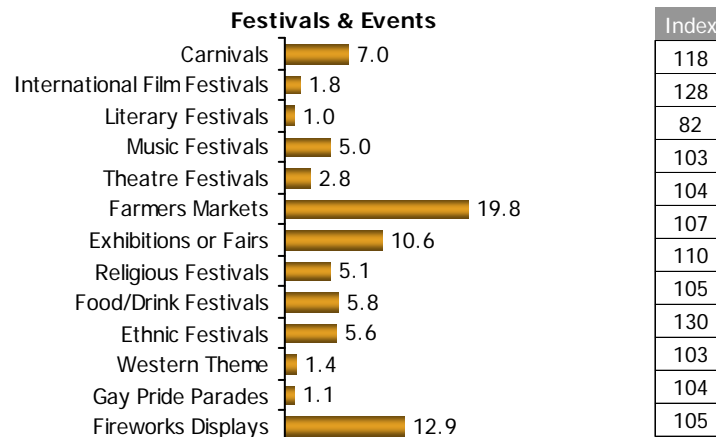
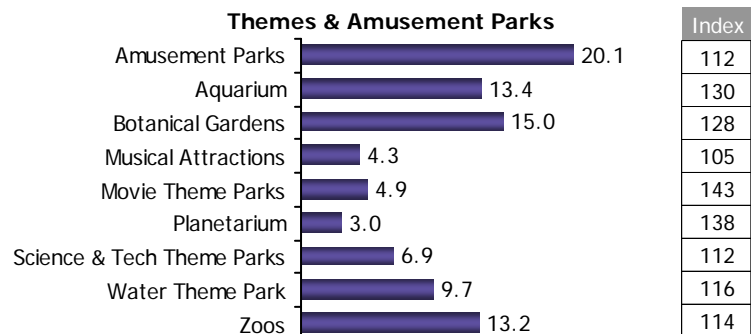
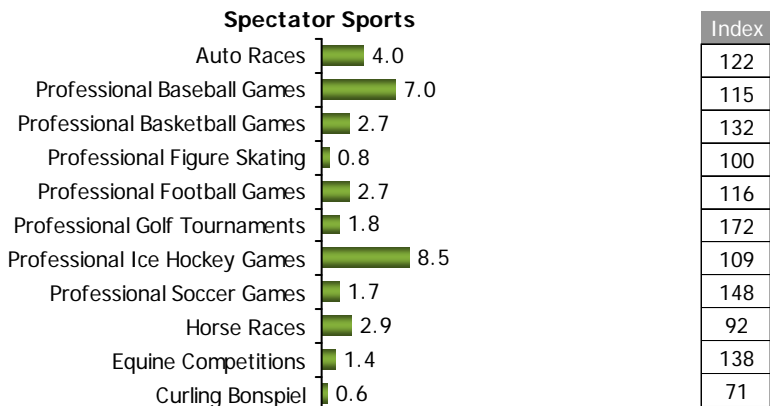
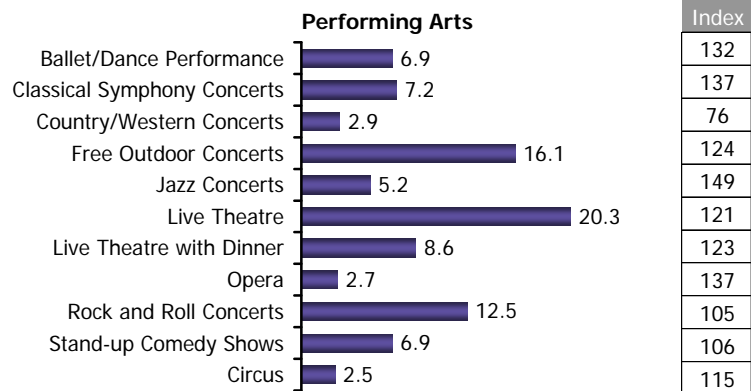
Expenditure on Last Vacation



Source of Travel Information



Source: BBM-RTS, TAMS



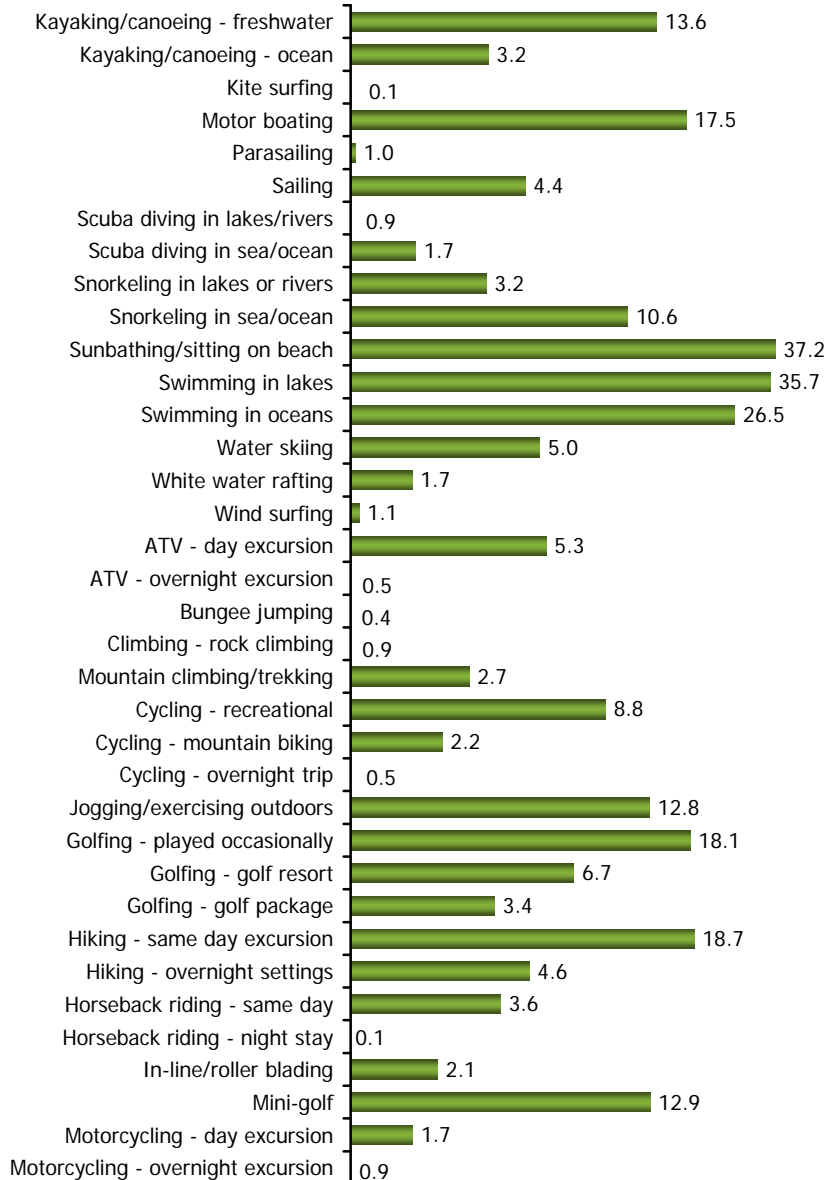
➤ % target group participates in activity
 ➤ Index – compares TG to all of ON. Index of 100 is average
 ➤ Most scaling is logarithmic for enhanced presentation

Source: TAMS

ONTARIO *Yours to discover* Adventurers: Outdoor Activities



Summer Activities

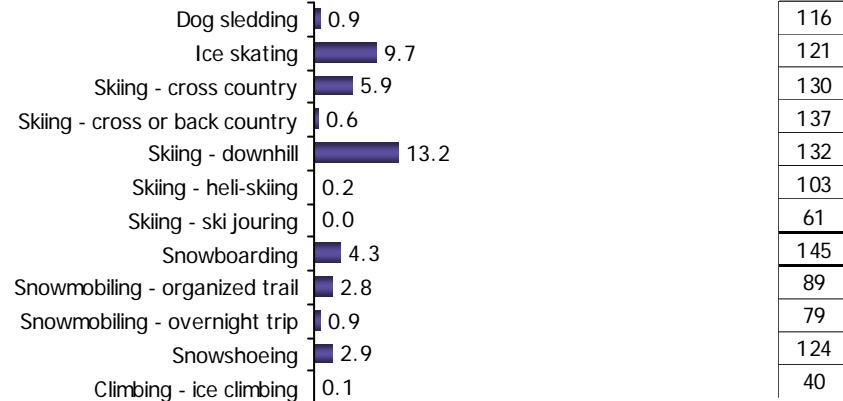


Source: TAMS

Index

110
140
61
114
92
119
91
94
129
134
111
110
125
111
96
103
102
50
125
70
125
109
84
101
136
133
182
200
109
82
99
64
120
119
110
108

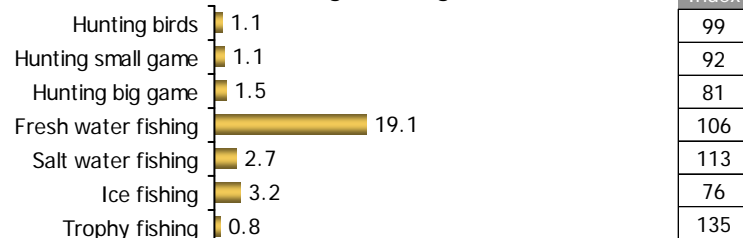
Winter Activities



Index

116
121
130
137
132
103
61
145
89
79
124
40

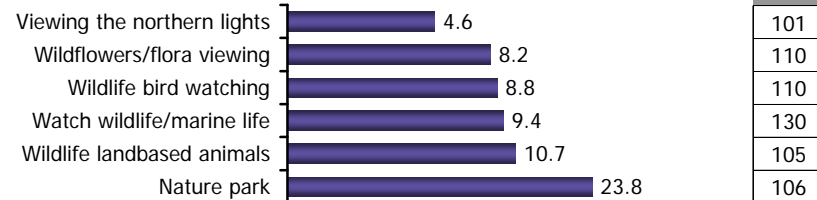
Hunting & Fishing



Index

99
92
81
106
113
76
135

Nature & Wildlife



Index

101
110
110
130
105
106

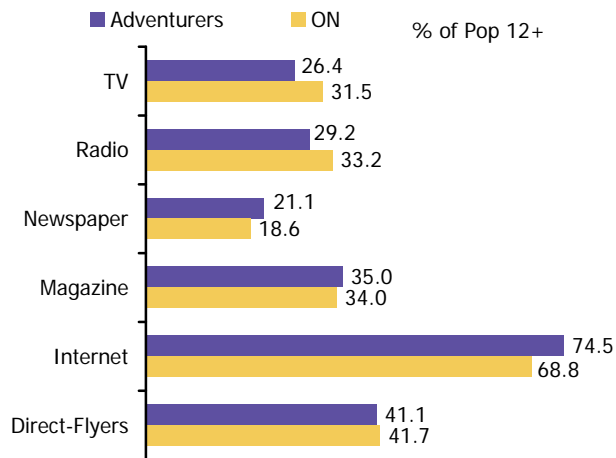
- This group enjoys a range of activities in both cities and the countryside
- In the summer, these adventurers particularly enjoy swimming, often in lakes and rivers



Media Overview

These Adventurers are heavy users of print media, having high readership of daily newspapers and a wide range of magazines, but they spend a lot of time on the internet, whether at home or at work. They enjoy a wide range of activities online, from shopping to instant messaging, and from reading the news to downloading music. Travel magazines along with the travel section of the daily newspaper are popular with this group, perhaps as inspiration for their next vacation. While they are lighter consumers of traditional broadcast media, their business-oriented occupations and their interest in sports keep them tuning into international news and their favourite teams' big games. With respect to direct media, this group uses flyers and coupons at rates about average for Ontario.

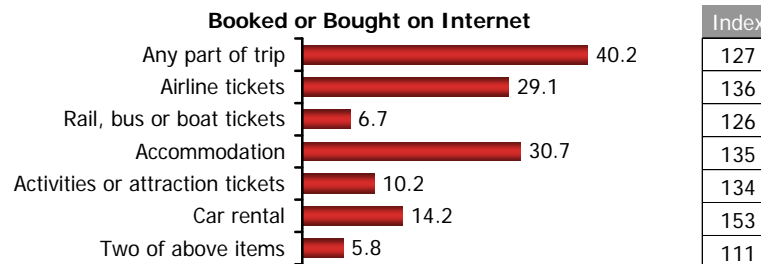
Media Usage



*TV, Radio & Newspaper Measure "Heavy Usage Tercile" Magazine Measures "Read Yesterday", Internet Measures "Yesterday" Direct Measures "Somewhat Favourable"

Source: BBM-RTS, TAMS

Booked/Bought Travel on the Internet



- These Adventurers are strong for booking most or all of their travel over the internet, in particular airfare and accommodation.

Media Highlights

Television: Light viewers; basketball, golf, football, movies, news/current affairs; Discovery Channel, A&E

Radio: Moderate listeners; sports, classical/fine arts, modern/alternative rock

Newspapers: Heavy daily readers; business & finance, sports, travel, entertainment sections

Magazines: Moderate readers; business and finance, sports and recreation, travel and tourism genres

Internet: Moderate to heavy users; high speed at home, use to search for information, research upcoming purchases

Direct: Unfavourable towards flyers, but very likely to use the internet in shopping. Average use of coupons, catalogues and mail order



Communication Themes

- ✓ Novelty and Culture – Attracted to and interested in diversity, this group is looking to try new things and sample new cultures
- ✓ Independent Thinkers – Control of Destiny is a theme for them and they are looking for Originality in what they do
- ✓ Energetic Discovery – They feel they are more energetic than others and not afraid of taking risks and sharing new experiences

Travel Behaviours

- ✓ Travel year round and often with luxury accommodation a key feature, all-inclusives, cottages and hotels are all popular
- ✓ Destinations: Will seek out interesting and exciting new destinations with an opportunity to learn about culture and share with their families
- ✓ Information: All sources especially internet and newspaper travel sections, as well as official Provincial/National sources

Creative Messaging

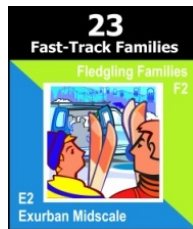
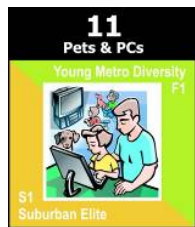
- ✓ Older middle-aged households with adult age children who are involved in a wide variety of activities
- ✓ These consumers appreciate comfort and luxury and are willing to pay for it
- ✓ They are attracted to activities that fit their active and upscale lifestyles with all the trappings they have earned through their hard work

Touch Points

- ✓ Online communications
- ✓ Ads in daily newspapers, especially business & finance, travel and entertainment sections
- ✓ Ads in business & finance magazines
- ✓ Outdoor ads on their drive routes



Core Clusters



Include for Tactical Reach



18.4% of Ontario Households (919,817)
 20.9% of Ontario Total Population (2,749,165)
 19.7% of Ontario 18+ Population (2,063,339)
 19.8% of Ontario 15+ Population (2,179,088)
 20.0% of Ontario 12+ Population (2,297,231)



Target Group Highlights

- These well off young families like to see it all, and enjoy time in Ontario's big cities and countryside
- Travel is usually by car to somewhere in Canada with the occasional flight to a sunny destination
- Holidays are generally frugal with limited expenditure on tickets to "kid focused" attractions, such as amusement parks and museums
- They are found near big and medium-sized cities in south and central Ontario, in places like Brampton, Vaughan, Barrie, Whitby, and Kitchener
- They are moderate users of most forms of media and are favourable to flyers delivered to their door



2007 PRIZM CE Clusters



Total Size in 2007: 952,610 HHs

Overview of Changes (More to Come):

- Size in market has decreased slightly (19.8% to 18.4% of ON HHs)
- Includes an expanded presence of midscale, exurban blue-collar families
- Expanded presence in exurban areas throughout Ontario
- Slightly stronger ethnic presence (mainly in Pets & PCs)

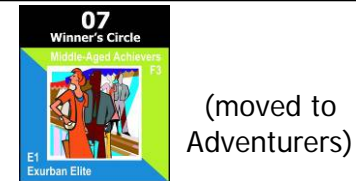
PRIZM C2: Stayed the Same (807090 HHs)



PRIZM C2: Added to Target Group (112,747 HHs)



PRIZM C2: Removed from Target Group (232,999 HHs)



Total Size in 2009: 919,817 HHs



- Size in market has decreased slightly (19.8% to 18.4% of ON HHs)
- Includes a greater presence of midscale, exurban blue-collar families
- Expanded presence in exurban areas throughout Ontario
- Slightly stronger ethnicity – slightly more South Asian

Key Similarities between 2007 and 2009 Segments

Demographics:

- Average household incomes are similar (\$103,000) however closer to ON average likely to changes in economy
- More blue collar families
- Similar presence across Ontario: top CSDs include Toronto, Brampton, Mississauga, Vaughan, Ottawa

Social Values:

- Time pressures seeking a break, relaxation or no schedule
- Importance of family time and memories
- Low risk takers not willing to try new cultures or take risks when travelling with kids

Travel and Leisure

- Strong for kid friendly activities
- Enjoy outdoor activities like cycling, hiking rafting, swimming
- Travel more in summer and around school breaks

Media

- Newspaper and Internet remain light and average respectively

Key Differences between 2007 and 2009 Segments

Demographics:

- More blue collar families slightly younger
- Smaller share of Toronto Metropolitan Area (38% vs 50%). More concentrated in suburbs and exurban areas around the major cities

Social Values:

- Seeking utilitarian – they like luxury but not at any cost.
- Become more rational like to include educational value for kids
- Seeking control. They want to do things on their schedule

Travel and Leisure

- Activities tend to be even more family oriented
- Less expensive activities

Media

- Stronger users of media. Television. Radio, magazine readership and direct mail have increased



Communication Themes

- ✓ Control – This group likes to feel in control and will want to do things their way and on their schedule
- ✓ Family Relaxation - Their travel will likely be centred around getting the kids out and involved in what is going on as well as getting a break from the daily grind
- ✓ Security – Given their penchant for family travel, they are not looking to take risks with their children and security is important on their trips

Travel Behaviours

- ✓ They tend to travel during their kids' vacation periods, so summer and March break are their strong travel seasons
- ✓ Destinations: Family-centric trips are big. They will likely cart the family off in the car or an RV along with the occasional longer trip to a warm destination. All-inclusives, cottages and camping
- ✓ Information: Generally they rely on friends and family, past experience, and the internet, but like to learn more at trade shows and from TV ads

Creative Messaging

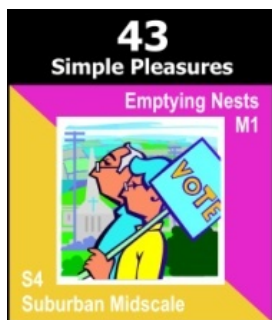
- ✓ Young families with young kids, family-oriented options are what will likely appeal
- ✓ They like luxury, but not at any cost, looking to get the most for their money and travel comfortably
- ✓ Stress-free travel is a key for them. They want to spend time with their families and relax without too many complications

Touch Points

- ✓ Online communications
- ✓ Radio stations during commuting hours. Mainstream rock or Top 40 are popular
- ✓ Ads in local weekday papers
- ✓ Outdoor billboards located on their commuting routes
- ✓ Ads in parenting, children's and entertainment magazines



Core Clusters



10.8% of Ontario Households (542,871)
 9.6% of Ontario Total Population (1,266,367)
 10.1% of Ontario 18+ Population (1,059,803)
 10.1% of Ontario 15+ Population (1,105,219)
 10.0% of Ontario 12+ Population (1,143,305)



Target Group Highlights

- These older couples enjoy trips that let them reconnect with nature, and see family in distant cities
- They like to camp or RV, and will occasionally fly to a special destination
- They use maps, information received in the mail, and official travel guides to plan the parks, historic sites and theatres on their itinerary, with an eye on the budget
- They are found in small cities in Ontario, in places like Thunder Bay, Sudbury, St. Catharines, and Windsor
- They are heavy TV viewers with a focus on sports and documentaries. They enjoy old time radio and like to read travel magazines



2007 PRIZM CE Clusters

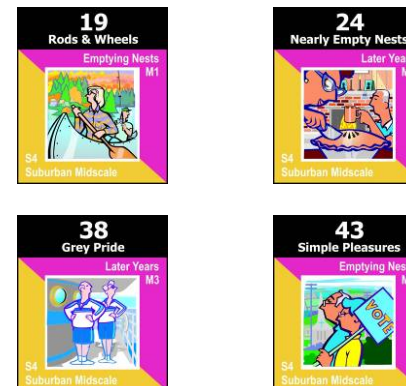


Total Size in 2007: 590,162 HHs

Overview of Changes (More to Come):

- Size in market has decreased (12.3% to 10.9% of ON HHs)
- Stronger concentration in the inner and older suburbs of Ontario's cities
- Less presence in small towns
- Comfort with technology has increased – but they still need plenty of reassurance

PRIZM C2: Stayed the Same (542,871 HHs)



PRIZM C2: Added to Target Group (0 HHs)

PRIZM C2: Removed from Target Group (65,114 HHs)



Removed from targeting

Total Size in 2009: 542,871 HHs



- Size in market has decreased (12.3% to 10.9% of ON HHs)
- Stronger concentration in the inner and older suburbs of Ontario's cities
- Less presence in small towns
- Comfort with technology has increased – but they still need plenty of reassurance

Key Similarities between 2007 and 2009 Segments

Demographics:

- Older couples and single retirees with moderate to low education levels
- Mix of households who own vs rent
- Low ethnic presence

Social Values:

- Seeking familiarity and simplicity
- Avoid big city promotions, prefer the simpler life
- Emphasize regions and attractiveness

Travel and Leisure

- Frequent travels, often by RV
- Parks in Canada and comforts of home
- Fishing and hunting and outdoor activities
- Lower budgets

Media

- Newspaper and Internet remain light and average respectively

Key Differences between 2007 and 2009 Segments

Demographics:

- Group has become slightly older
- Average household income went up to \$77,120

Social Values:

- Desire to leave families with a firm cultural, moral and spiritual legacy
- Often place family ahead of themselves, will often get them involved in travel planning

Travel and Leisure

- Attend select spectator sports like baseball, golf and skating
- Prefer summer activities including nature and wildlife

Media

- Increase in television, radio and magazine readership
- More favourable towards direct mail



Communication Themes

- ✓ Canada & Ontario – These are proud Canadians and Ontarians, so emphasizing this will appeal to their sense of national pride, specifically focused on Ontario
- ✓ Simple & Stress Free – Complexity and stress are not appealing. They want to get away and keep things simple
- ✓ Cost Conscious – Price is important to these budget-conscious travellers

Travel Behaviours

- ✓ They travel all year and are always willing to pick up and go on short notice. They tend to seek out more cost-saving options
- ✓ Destinations: They like to travel to familiar destinations within Canada. Parks and small towns and cities appeal
- ✓ Information: They use travel guides and rely on their past experiences and recommendations, as well as mailed information

Creative Messaging

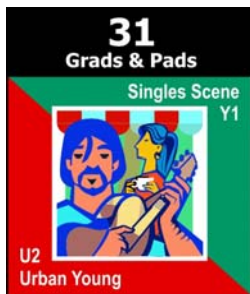
- ✓ Active seniors 65+ who are looking to get in touch with nature, or to have a taste of big city life, and are not tied down by kids or jobs
- ✓ Keep it familiar. They do not want to discover new territory or break new ground, but rather prefer what they know and what they like
- ✓ Ecological awareness is high, so activities that align with this and companies that align with this will appeal

Touch Points

- ✓ TV Advertising during golf, auto racing, figure skating, game shows or baseball on TV
- ✓ Radio advertising, especially on country, adult standards and oldies stations
- ✓ Magazine ads in seniors, nature & ecology or tourism titles
- ✓ Ads in community papers
- ✓ Favourable to direct mail
- ✓ Avoid the internet



Core Clusters



3.4% of Ontario Households (169,221)
 3.2% of Ontario Total Population (422,724)
 3.3% of Ontario 18+ Population (346,707)
 3.3% of Ontario 15+ Population (362,540)
 3.3% of Ontario 12+ Population (376,112)



Target Group Highlights

- These young up-and-comers enjoy exploring new places and cultures with their friends or partners
- Trips are typically long weekends with friends visiting nearby cities or affordable places in the countryside
- They like to use official travel guides to give them a good deal on music festivals, sports and outdoor activities such as white water rafting
- They live mostly in Toronto and the other university cities such as Ottawa, London and Kingston
- They rely on the guide books (including official) and the internet for most of their information, including online newspapers, magazines and radio streaming



2007 PRIZM CE Clusters



Total Size in 2007: 181,124 HHs

Overview of Changes (More to Come):

- Market size has decreased (3.8% to 3.0% of ON HHs)
- Fewer young professional "elites," more recent grads just starting out
- Slightly younger overall
- Ethnic diversity is similar
- Stronger interest in ethical consumerism

PRIZM C2: Stayed the Same (101,456 HHs)



PRIZM C2: Added to Target Group (46,942 HHs)



PRIZM C2: Removed from Target Group (89,092 HHs)



(moved to Adventurers)

Total Size in 2009: 148,398 HHs



Communication Themes

- ✓ Open Minded: Deep interest in other cultures and living an Ecological Lifestyle.
- ✓ Stress Relief: Their fast-paced, youthful lives can get stressful, and many feel a need for escape and rejuvenation
- ✓ Control Seekers: They look to exercise control over all aspects of their lives and are concerned about original touches and being unique.

Travel Behaviours

- ✓ Weekenders who like to get away after a tough week at the office on short trips as well as the occasional escape to somewhere warm
- ✓ Destinations: Popular scenic locations as well as periodic trips to sunny destinations. Likely to seek out eclectic accommodations like B&Bs or the homes of friends and relatives (or friends and relatives of friends and relatives!)
- ✓ Information: Online information is key, and they also go by official and non-official travel guides, past experience, and recommendations

Creative Messaging

- ✓ Young, hip urbanites in the under-35 age range who lead active social lives and will probably be looking for ways to mingle
- ✓ They like thrills and excitement and are willing to take risks
- ✓ Other cultures and the mystique of discovery will be of interest
- ✓ They are not overly concerned about price

Touch Points

- ✓ Online communications; websites that well-designed and beautiful to look at
- ✓ Ads in national and local newspapers, specifically in the business, tech and entertainment sections
- ✓ Ads in food, fashion and current affairs magazines
- ✓ Public transit ads (in areas where applicable)
- ✓ Less receptive to flyers



- Market size has decreased (3.8% to 3.0% of ON HHs)
- Fewer young professional “elites,” more recent grads just starting out
- Slightly younger overall
- Ethnic diversity is similar
- Stronger interest in ethical consumption

Key Similarities between 2007 and 2009 Segments

Demographics:

- Still young up and coming professionals
- Well educated and concentrated in the Toronto and Ottawa markets

Social Values:

- Believe in modern definitions of Gender and Family relations.
- Very social
- Like to be in control
- Not overly concerned about price

Travel and Leisure

- Long weekends and week long get aways to cities and urban areas with all the action
- Often travel by car and stay with friends
- Like what cities have to offer

Media

- Internet is still the best way to reach this group. Direct mail remains unfavorable and TV and radio remain light.

Key Differences between 2007 and 2009 Segments

Demographics:

- Slightly younger
- Average household income has decreased to \$81,000 slightly below the provincial average
- Concentration in Toronto has dropped due to a segment becoming adventures

Social Values:

- Seeking new experiences and opportunities to sample different cultures
- Need for escape to share stories and be pampered

Travel and Leisure

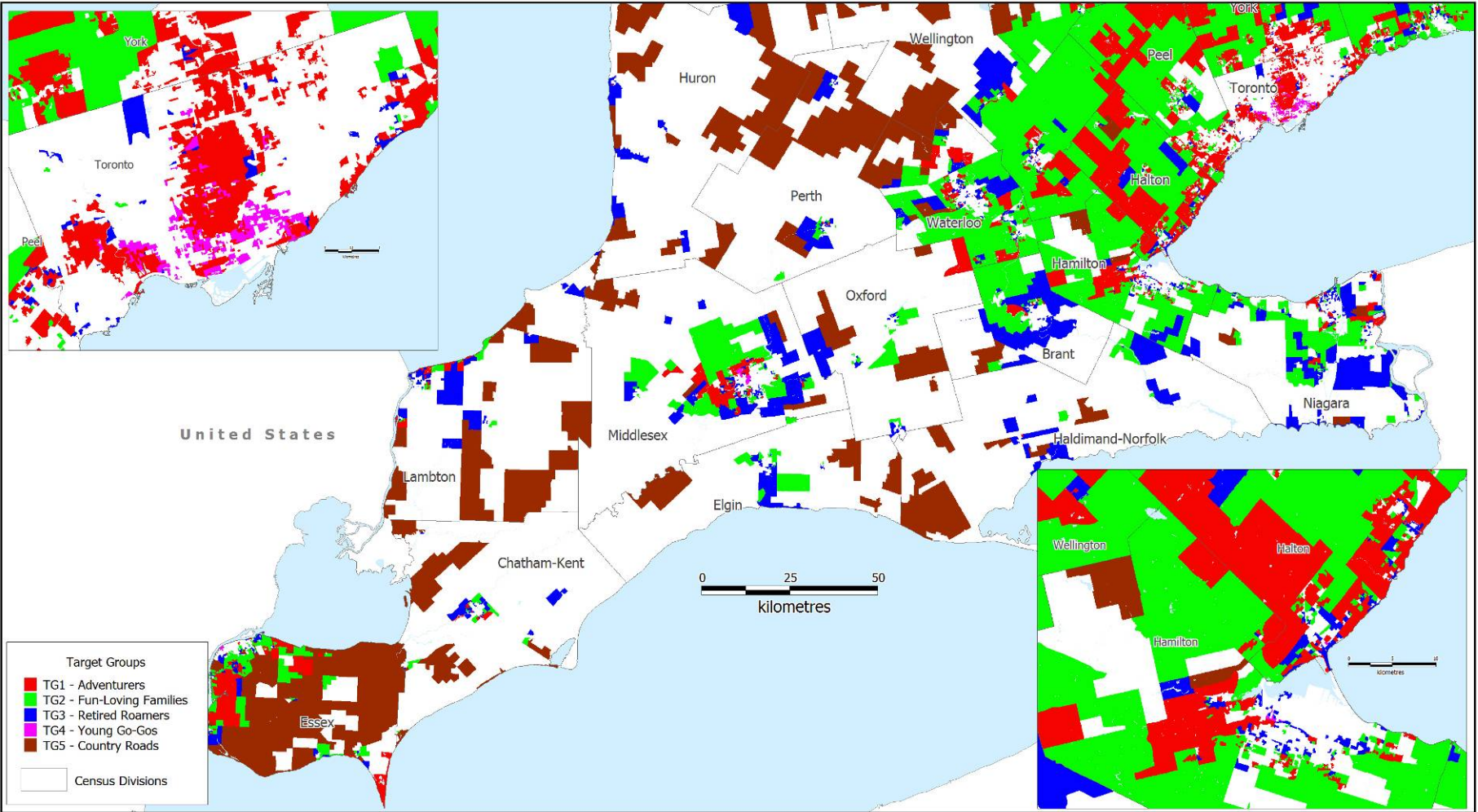
- Interested in the arts, festival events and history sites to seek the experience wide range activities that are more urban oriented.
- Avoid hunting and fishing offers

Media

- Magazine readership has increased and newspaper readership has dropped



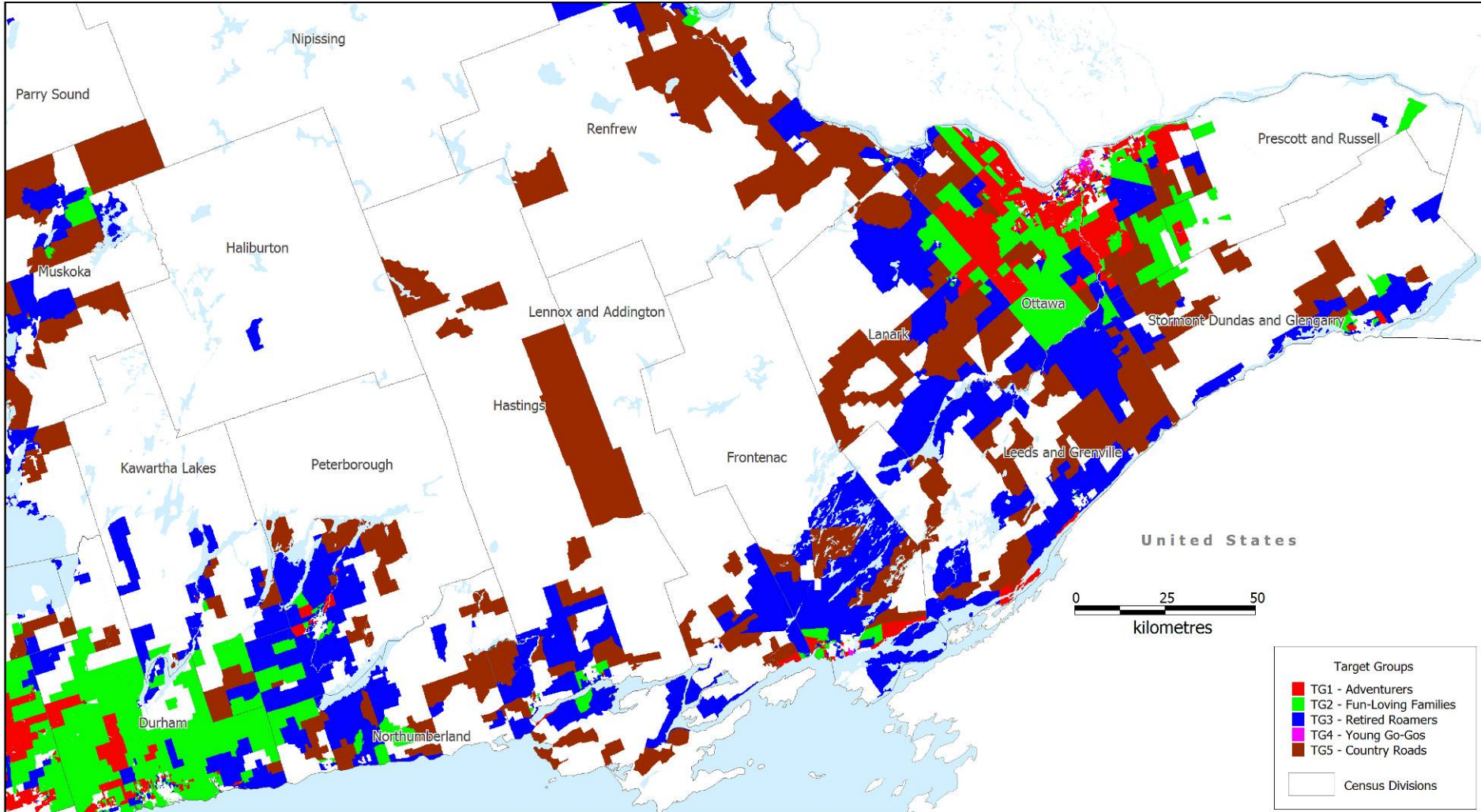
**OTMPC
Target Groups
Southwestern Ontario - By Dissemination Area**



©2009 Environics Analytics. Based, in part, on computer files licensed from Statistics Canada under Licensing Agreement 6894. No confidential information was provided by Statistics Canada. PRIZM and selected PRIZM2 nicknames are trademarks of Nielsen Claritas Services, The Nielsen Company (U.S.) and are used with permission.



**OTMPC
Target Groups
Eastern Ontario - By Dissemination Area**



Target Groups

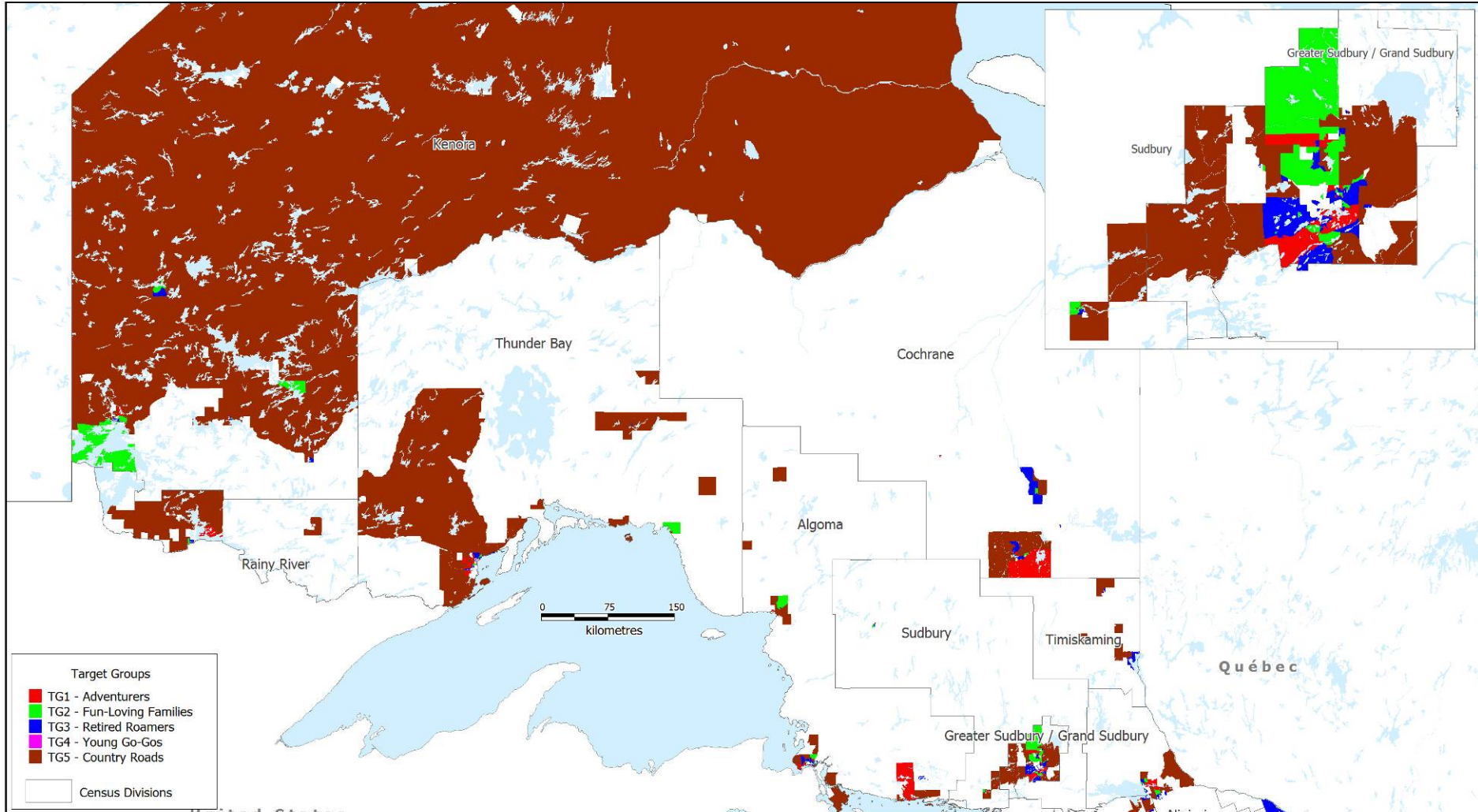
- TG1 - Adventurers
- TG2 - Fun-Loving Families
- TG3 - Retired Roamers
- TG4 - Young Go-Gos
- TG5 - Country Roads

Census Divisions

©2009 Environics Analytics. Based, in part, on computer files licensed from Statistics Canada under Licensing Agreement 6894. No confidential information was provided by Statistics Canada. PRIZM and selected PRIZM/C2 nicknames are trademarks of Nielsen Claritas Services, The Nielsen Company (U.S.) and are used with permission.



**OTMPC
Target Groups
Northern Ontario - By Dissemination Area**



©2009 Environics Analytics. Based, in part, on computer files licensed from Statistics Canada under Licensing Agreement 6894. No confidential information was provided by Statistics Canada. PRIZM and selected PRIZM2 nicknames are trademarks of Nielsen Claritas Services, The Nielsen Company (U.S.) and are used with permission.



Push & track targeted email



Acquire, Track, & Retain with targeted mail



Target Key Customers for Cross-Sell



Tailor web content, direct site traffic



Customize inbound / outbound messaging



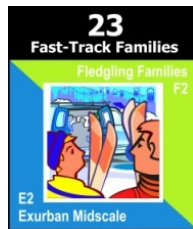
Target Out-of-Home



Target Mass Media



Core Clusters



Include for Tactical Reach



18.4% of Ontario Households (919,817)
 20.9% of Ontario Total Population (2,749,165)
 19.7% of Ontario 18+ Population (2,063,339)
 19.8% of Ontario 15+ Population (2,179,088)
 20.0% of Ontario 12+ Population (2,297,231)



Target Group Highlights

- These well off young families like to see it all, and enjoy time in Ontario's big cities and countryside
- Travel is usually by car to somewhere in Canada with the occasional flight to a sunny destination
- Holidays are generally frugal with limited expenditure on tickets to "kid focused" attractions, such as amusement parks and museums
- They are found near big and medium-sized cities in south and central Ontario, in places like Brampton, Vaughan, Barrie, Whitby, and Kitchener
- They are moderate users of most forms of media and are favourable to flyers delivered to their door



Demographic Highlights

Lifestyle: Younger families with small children

HH Size: Large; 58% with 3+ people

Housing Type: Owners; above average for recently built semi-detached houses and low-rise condos

Education: Highly educated; above average for college (21%); average rates for high-school (27%), university (25%)

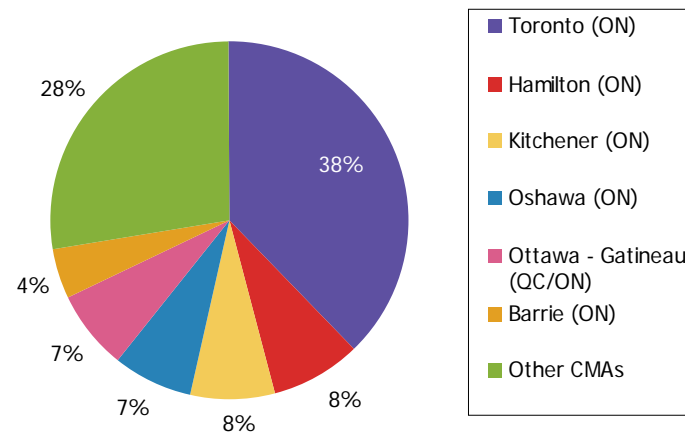
Job Type: Mixed; above average for management (8%), sciences (5%); average sales and service (16%), business finance administration (14%), trades, transport, operators (10%)

Commuting: 89% drive (12% higher than average)

Diversity: Average at 29%; South Asian (8%)

Average HH Income: \$103,732 (17% greater than average)

Top Census Metropolitan Areas (CMAs)



Lifestyle Overview

Ontario's Fun-Loving Families are younger families, living near the province's large and medium-sized cities, who have diverse careers and levels of education. Their outings are largely family oriented, including Saturday afternoon trips to theme parks, the zoo or the local aquarium, attending a CFL game, or playing softball. They enjoy spending time outside, and try to make a couple trips a year to nearby Provincial and National parks. While their kids determine many of their leisure activities, parents do their best to make time to pursue their own passions. You can find many of these adults gardening, working out at home, and dining out with friends. These dual-salary earners spend their above-average incomes maintaining their new, single detached homes, and purchasing golf and exercise gear.

Top Markets – Census Subdivisions

Name	Target Group		Market		Penetration	
	# of HHds	% of Mkt	# of HHds	% of Mkt	% Pen	Index
Ottawa (ON)	61,741	6.71	352,502	7.04	17.52	95
Brampton (ON)	53,669	5.83	148,690	2.97	36.09	196
Mississauga (ON)	48,963	5.32	236,070	4.72	20.74	113
Vaughan (ON)	43,311	4.71	84,771	1.69	51.09	278
Hamilton (ON)	42,631	4.63	211,923	4.23	20.12	109
Barrie (ON)	33,457	3.64	55,025	1.10	60.80	331
Windsor (ON)	26,794	2.91	94,481	1.89	28.36	154
Kitchener (ON)	26,335	2.86	88,303	1.76	29.82	162
London (ON)	25,003	2.72	158,312	3.16	15.79	86
Whitby (ON)	23,129	2.51	45,500	0.91	50.83	277
Legend	Low Index (I<80)			High Index (I>120)		



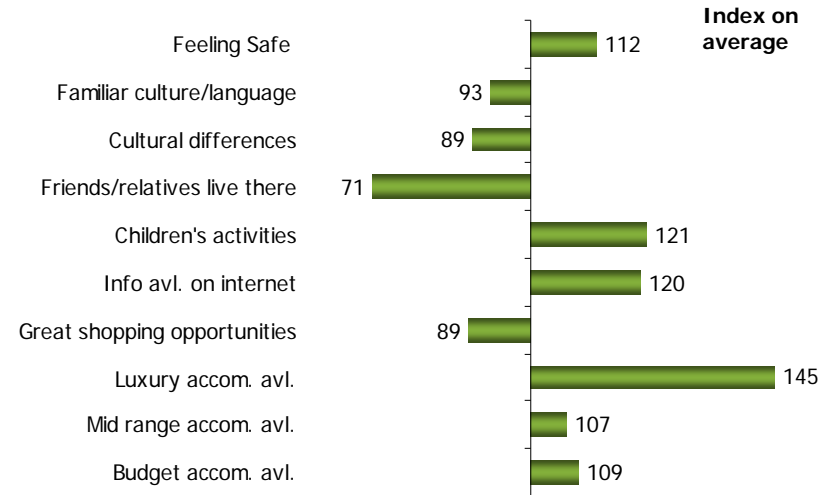
Travel-Oriented Social Values

Key Travel-Related Social Values			
Value	Index	Value	Index
Adaptive Navigation	102	Importance of Price	91
Aversion to Complexity	100	Need for Escape	94
Canadian Identity	99	Need for Status Recognition	102
Confidence in Advertising	98	Penchant for Risk Taking	92
Confidence in Big Business	103	Primacy of the Family	108
Confidence in Small Business	92	Pursuit of Originality	95
Control of Destiny	107	Pursuit of Novelty	103
Cultural Fusion	101	Risk Aversion	104
Ecological Lifestyle	93	Search For Roots	103
Financial Concern Re Future	85	Technological Anxiety	97
High Index (110+)		Low Index (90/less)	

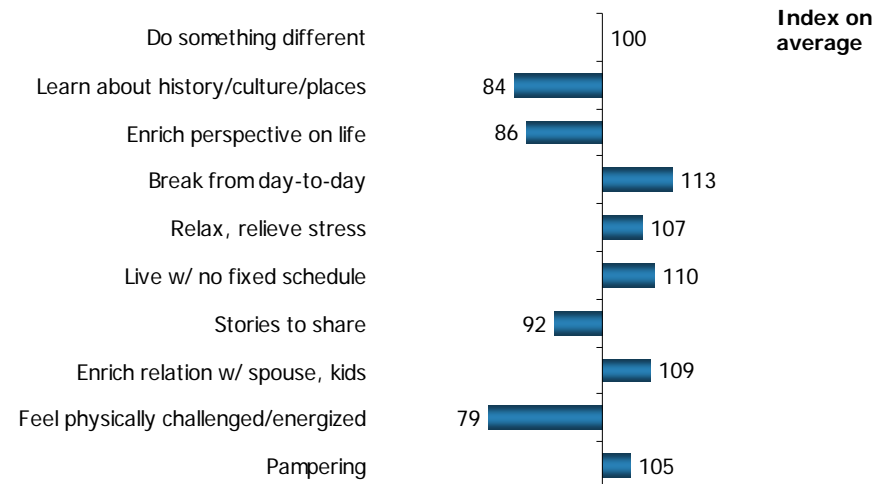
Social Values Overview

These busy families feel like there is never enough time in the day to accomplish everything they need to do, and as such, they want to ensure their vacations give them a chance to relax, get pampered, and live without a fixed schedule. Provincial Families place a lot of importance on family bonding, and trips designed to enrich the entire family will have particular appeal. Since they like to have a strong sense of agency over their life events and see technology as a great tool for managing their everyday lives, they like to design the content of their vacations themselves, and will often use the internet to do research and book their transportation and accommodations. While they enjoy a few bells and whistles, these families are largely rational consumers that like their trips to include educational value for kids and adults alike.

Vacations – Conditions Sought



Vacations – Benefits Sought





Personal Travel Highlights

Type of Trip: Family-centered getaways to major destinations in Canada and the United States

Destinations: National/Provincial parks in Canada, sun destinations, major Canadian cities

Travel Mode: Mainly car/RV travel, but will occasionally fly to a sun destination or to a far-away Canadian city

Accommodation: Camping, All-Inclusive, hotel, or with friends/relatives

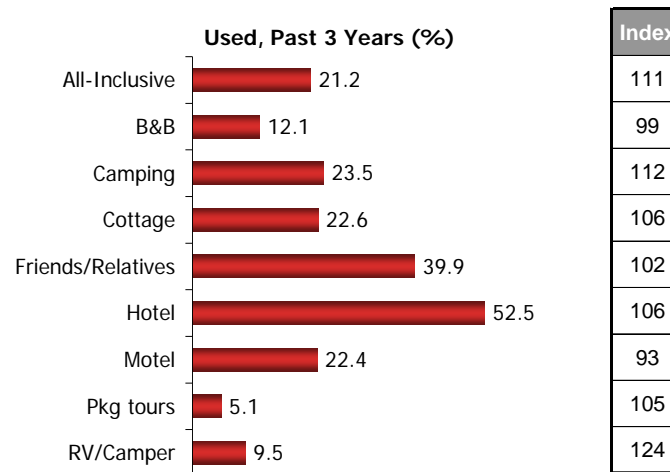
Activities/Attractions: Hiking and swimming; Kid-friendly fun like theme parks, museums, and "natural wonders"

Expenditure: Generally frugal, but will splurge on attraction tickets for the whole family

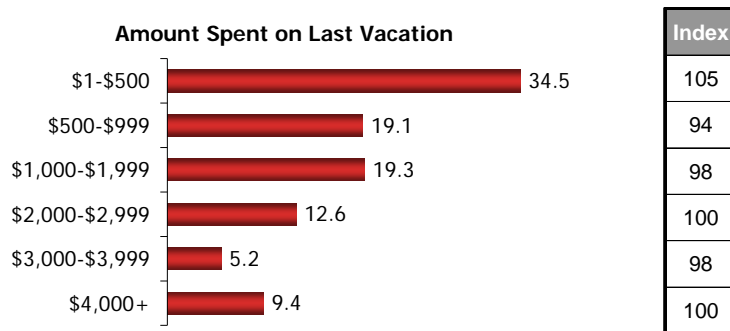
Seasons: Spring break and summer

Information Sources: Trade and travel shows, TV ads, travel websites, friends/relatives recommendation and past experience

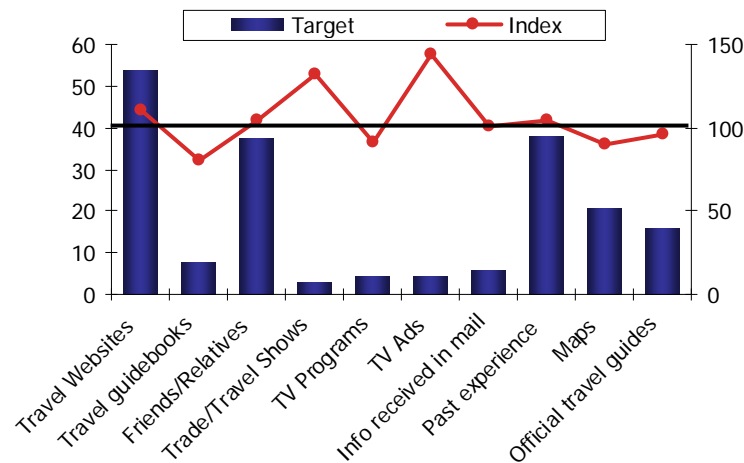
Travel Accommodation



Expenditure on Last Vacation



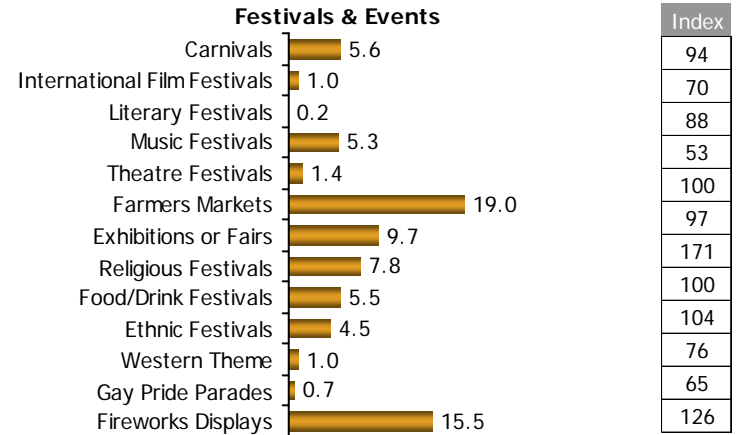
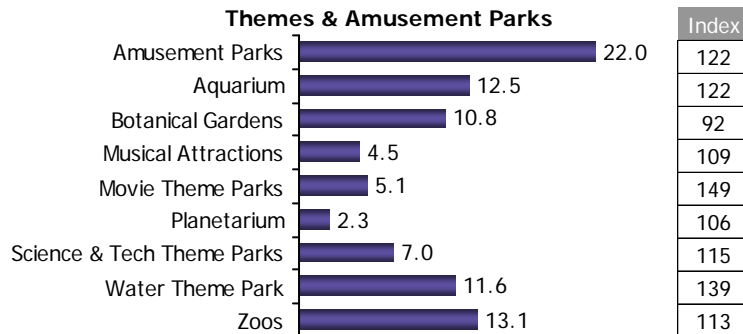
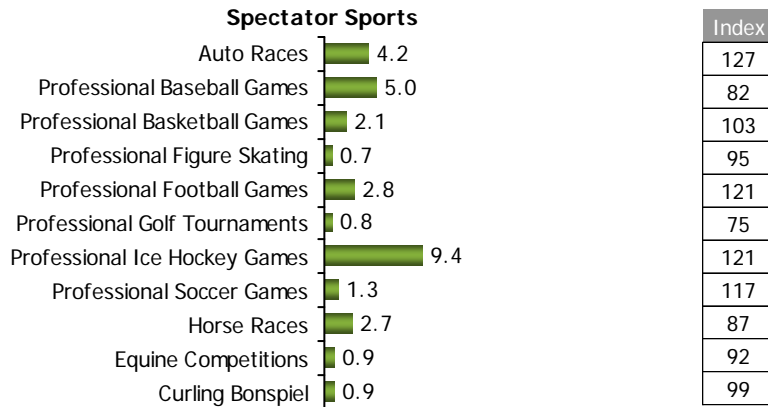
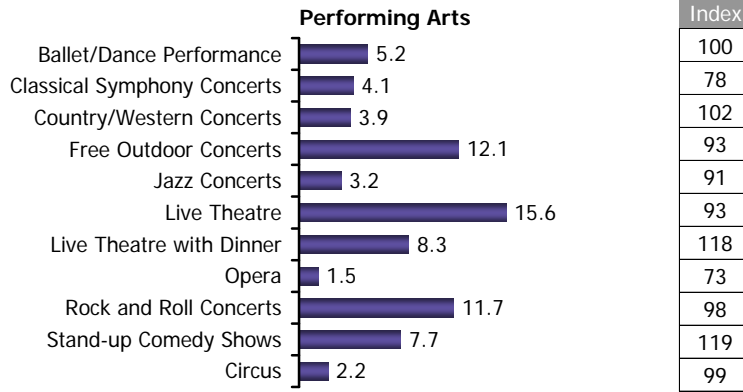
Source of Travel Information



Source: BBM-RTS, TAMS

ONTARIO Fun-Loving Families: Arts & Culture

Yours to discover



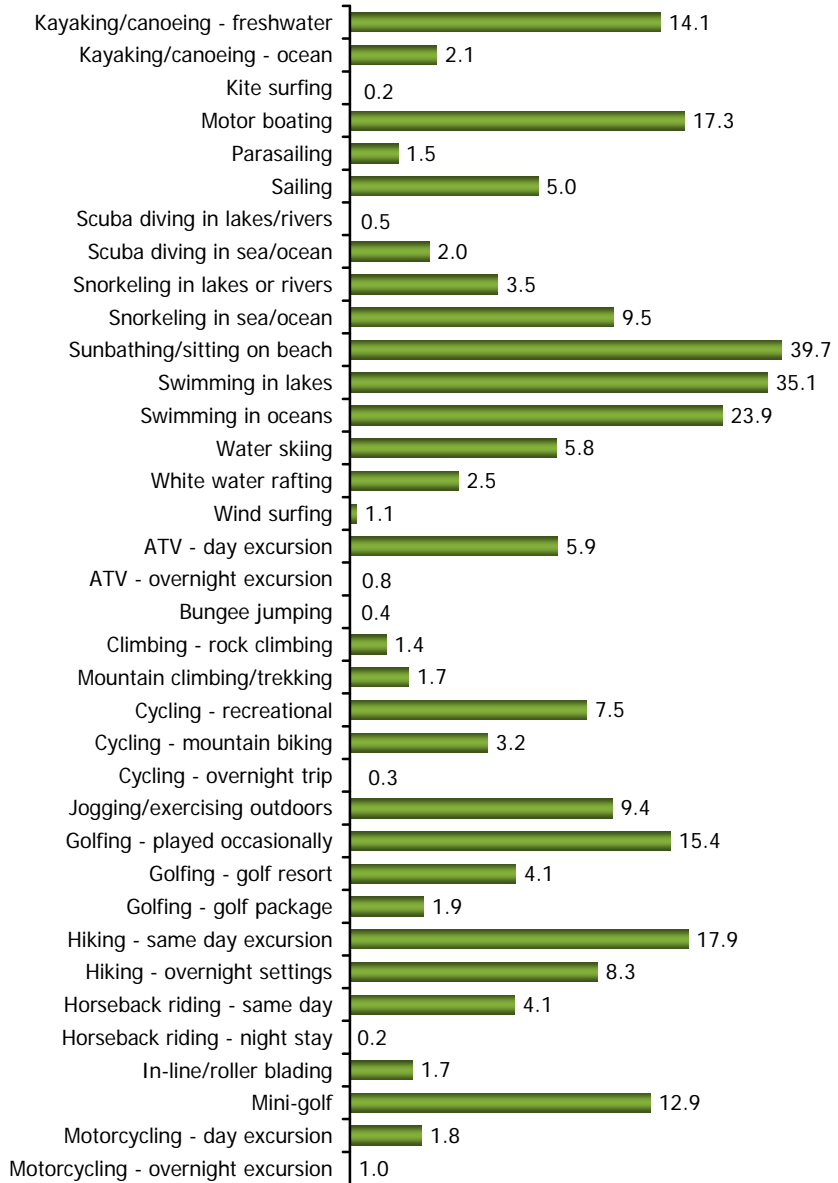
- % target group participates in activity
- Index – compares TG to all of ON. Index of 100 is average
- Most scaling is logarithmic for enhanced presentation

Source: TAMS

ONTARIO Fun-Loving Families: Outdoor Activities



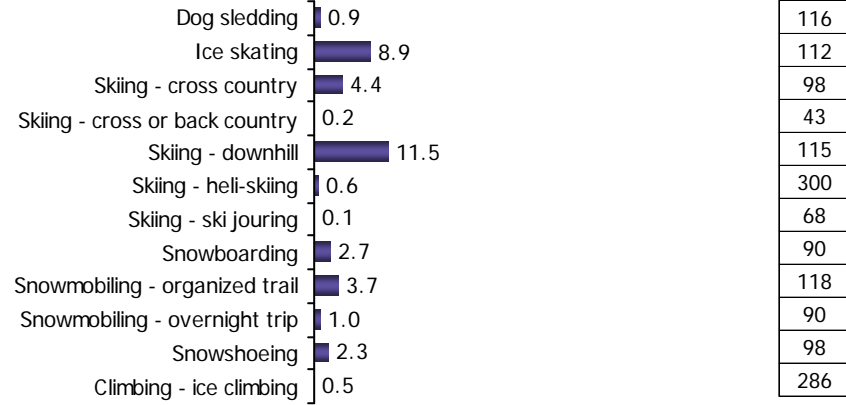
Summer Activities



Index

114
91
155
113
133
133
55
106
144
120
119
108
113
128
143
101
114
83
108
110
75
94
125
54
100
113
112
110
105
148
112
106
98
120
120
119

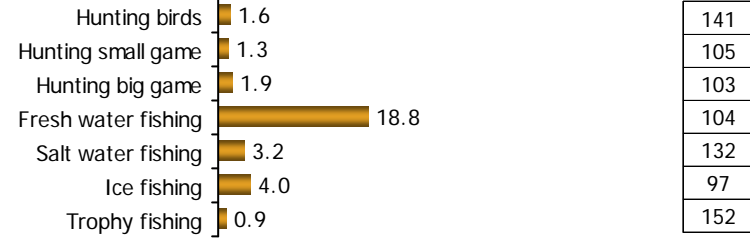
Winter Activities



Index

116
112
98
43
115
300
68
90
118
90
98
286

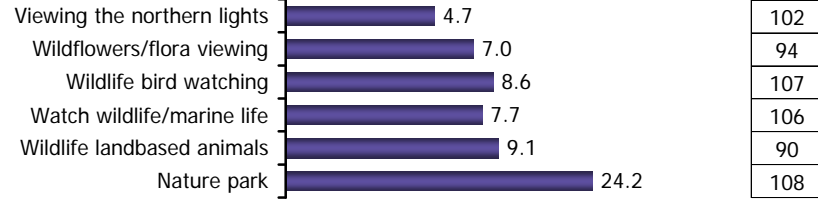
Hunting & Fishing



Index

141
105
103
104
132
97
152

Nature & Wildlife



Index

102
94
107
106
90
108

- While this group enjoys all sorts of family fun at theme and amusement parks, they enjoy almost every kind of outdoor activity at rates above the average for Ontario
- They are not as strong for many city activities, preferring trips where they can camp and get in touch with nature

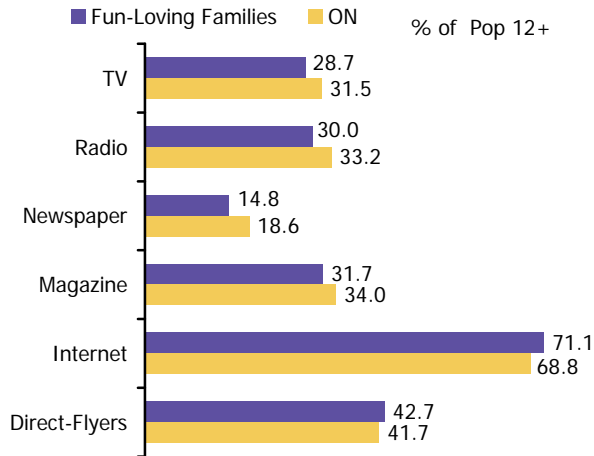
Source: TAMS



Media Overview

Moderate media consumers in general, Ontario's Fun-Loving Families use broadcast and print media to stay up to date on local, national and international news as well as sports. As with all consumers, their interests and lifestyle determine the type of media they consume. They love their suburban homes and are always interested in keeping the décor current and interesting, and home and garden TV shows and magazines are very popular. They also display an interest in the entertainment industry – they like reality TV, *People* magazine, and reading the entertainment section of the national paper. Online, they access their traditional media sources; they visit news and radio station websites, chat groups, and music downloading sites. They use the internet, coupons and flyers in shopping at average rates.

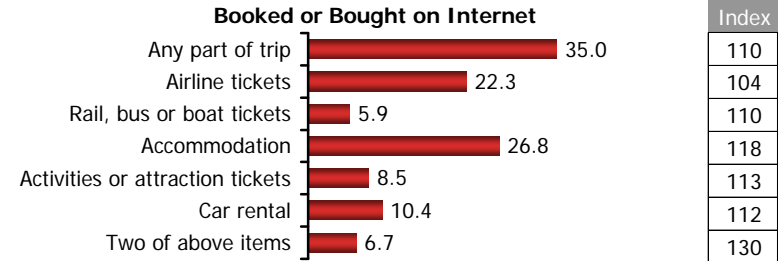
Media Usage



*TV, Radio & Newspaper Measure "Heavy Usage Tercile" Magazine Measures "Read Yesterday", Internet Measures "Yesterday" Direct Measures "Somewhat Favourable"

Source: BBM-RTS, TAMS

Booked/Bought Travel on the Internet



- These families are strong for researching and booking as much of their vacation as possible on the internet, in the comfort of their home or office.

Media Highlights

Television: Moderate viewers; reality shows, NFL football, home improvement shows; Treehouse TV, NHL Network, HGTV

Radio: Moderate listeners; AOR/mainstream rock, modern/alternative rock, Top 40/CHR

Newspapers: Lighter readers of dailies and community papers; real estate, domestic & international news, entertainment sections

Magazines: Moderate readers; Babies & Parenting, Children & Youth, Entertainment & Music titles

Internet: Average users; high speed at home; perform a range of activities online like streaming video, chat, music downloads

Direct: Favourable to flyers delivered to the door or in the mail; average use of coupons, catalogues and the internet for shopping; below average use of mail order



Core Clusters

19
Rods & Wheels
Emptying Nests
M1
S4
Suburban Midscale

24
Nearly Empty Nests
Later Years
M3
S4
Suburban Midscale

38
Grey Pride
Later Years
M3
S4
Suburban Midscale

43
Simple Pleasures
Emptying Nests
M1
S4
Suburban Midscale

10.8% of Ontario Households (542,871)
9.6% of Ontario Total Population (1,266,367)
10.1% of Ontario 18+ Population (1,059,803)
10.1% of Ontario 15+ Population (1,105,219)
10.0% of Ontario 12+ Population (1,143,305)



Target Group Highlights

- These older couples enjoy trips that let them reconnect with nature, and see family in distant cities
- They like to camp or RV, and will occasionally fly to a special destination
- They use maps, information received in the mail, and official travel guides to plan the parks, historic sites and theatres on their itinerary, with an eye on the budget
- They are found in small cities in Ontario, in places like Thunder Bay, Sudbury, St. Catharines, and Windsor
- They are heavy TV viewers with a focus on sports and documentaries. They enjoy old time radio and like to read travel magazines



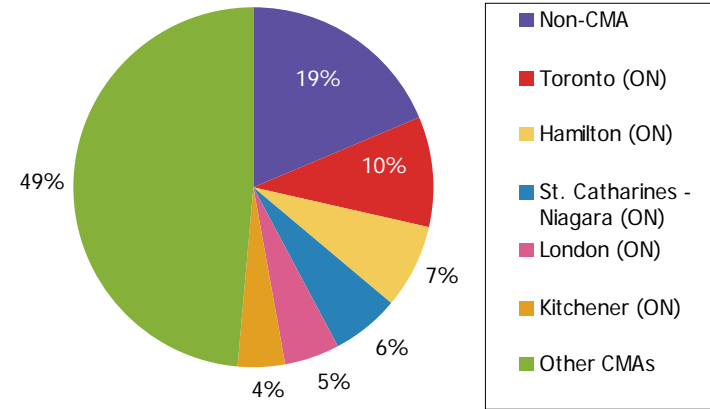
Demographic Highlights

- Lifestage:** Older (65+ years) empty nested couples and singles
- HH Size:** Small; 67% with 2 or less people
- Housing Type:** Owned older single-detached houses and rented high-rise apartments
- Education:** Moderate; college and trade/apprenticeship diplomas are both common
- Job Type:** Many retirees; those who work have jobs in health, sales/service, business, and trades
- Commuting:** 87% drive (9% above average), 6% walk (8% above average)
- Diversity:** Below average at 16%
- Average HH Income:** \$77,120 (13% below average)

Lifestyle Overview

Retired Roamers are older and mature couples and singles (some widowed) living in suburban regions across the Province. They have diverse education and employment, but their lifestyles have much in common. With a considerable amount of leisure time, members of this group enjoy indoor hobbies, spending time in nature, and attending lots of trade shows. During the warm weather months these retirees are active in their gardens, and enjoy camping and power boating. Winter sports for this group are curling and cross country skiing. Their trade show attendance is reflective of their outdoorsy lifestyles; garden, RV, healthy living, and sportsman's shows are popular. They also like to get out and enjoy what their neighbourhood has to offer and can be found at the park, enjoying community theater, and at local fairs.

Top Census Metropolitan Areas (CMAs)



Top Markets – Census Subdivisions

Name	Target Group		Market		Penetration	
	# of HHds	% of Mkt	# of HHds	% of Mkt	% Pen	Index
Hamilton (ON)	25,160	4.63	211,923	4.23	11.87	109
Ottawa (ON)	22,372	4.12	352,502	7.04	6.35	59
Toronto (ON)	19,790	3.65	1,062,592	21.23	1.86	17
London (ON)	18,225	3.36	158,312	3.16	11.51	106
Greater Sudbury (ON)	16,382	3.02	68,417	1.37	23.94	221
St. Catharines (ON)	14,321	2.64	58,657	1.17	24.41	225
Burlington (ON)	14,010	2.58	71,298	1.42	19.65	181
Windsor (ON)	12,727	2.34	94,481	1.89	13.47	124
Thunder Bay (ON)	12,015	2.21	48,557	0.97	24.74	228
Kitchener (ON)	10,936	2.01	88,303	1.76	12.38	114
Legend	Low Index (I<80)			High Index (I>120)		



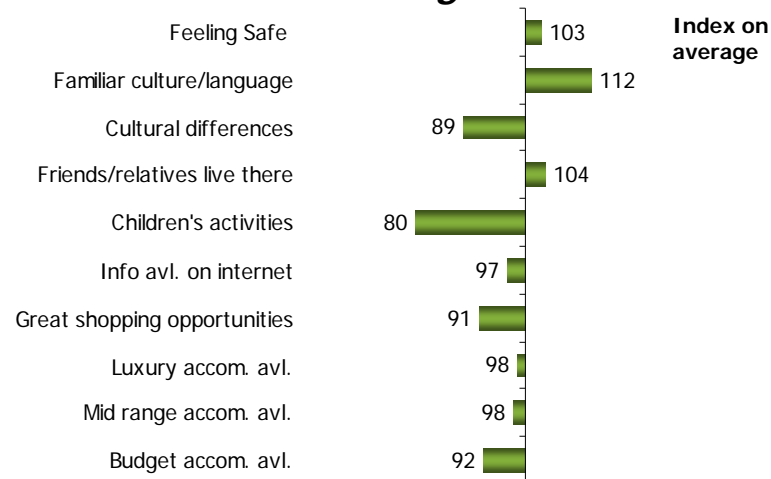
Travel-Oriented Social Values

Key Travel-Related Social Values			
Value	Index	Value	Index
Adaptive Navigation	92	Importance of Price	107
Aversion to Complexity	113	Need for Escape	113
Canadian Identity	114	Need for Status Recognition	88
Confidence in Advertising	105	Penchant for Risk Taking	96
Confidence in Big Business	97	Primacy of the Family	114
Confidence in Small Business	94	Pursuit of Originality	91
Control of Destiny	105	Pursuit of Novelty	89
Cultural Fusion	99	Risk Aversion	119
Ecological Lifestyle	102	Search For Roots	70
Financial Concern Re Future	105	Technological Anxiety	95
High Index (110+)		Low Index (90/less)	

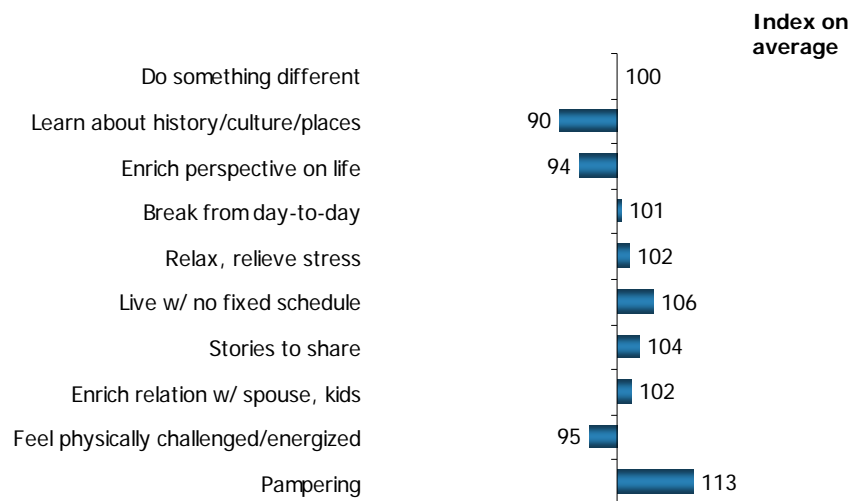
Social Values Overview

The ideal vacation for Retired Roadies is one where they can escape from the complexities and stresses of modern life, get away from the stresses of their everyday life, and get back to a more simple, healthy, and authentic way of life. Given their strong pride in their Canadian and Ontario heritage, spending time in Ontario and in Canada's scenic parks and landscapes is immensely popular with this group, as it lets them get in touch with their roots. These Roamers place their families before themselves, and they often like to involve their adult children and grandchildren in their travel plans. Furthermore, this group has a strong desire to leave their families with a firm cultural, moral, and spiritual legacy, and their vacations, and the learning and experiences which result from them are an ideal way to initiate that gift.

Vacations – Conditions Sought



Vacations – Benefits Sought





Personal Travel Highlights

Type of Trip: Long, leisurely trips to National and Provincial parks, often swinging by cities to visit family and friends

Destinations: Parks across Canada, Northern Ontario, Toronto, and a range of other smaller cities and towns in Ontario

Travel Mode: Car or RV; occasionally they'll fly to a particularly special destination

Accommodation: RV/Camper, motel, camping, hotel, cottage

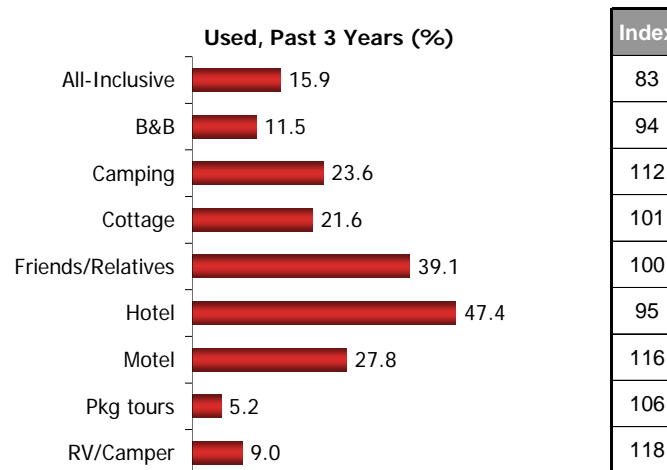
Activities/Attractions: Outdoorsy activities like hiking, cross country skiing, and hunting/fishing; live theatre, historic/interpretive sites

Expenditure: Some big spenders, but with many fixed incomes this group is pleased to find a good deal

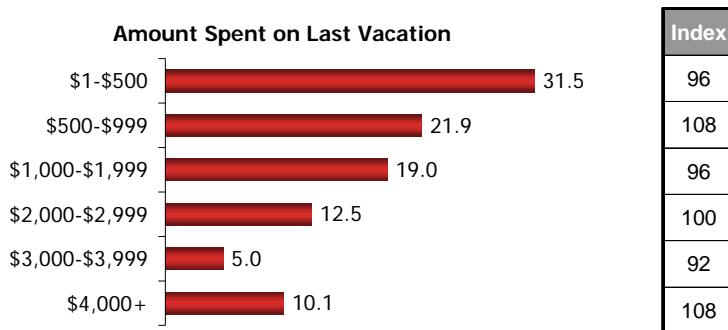
Seasons: All seasons, particularly spring and fall

Information Sources: Official travel guides, past experience, information received in the mail, and TV commercials

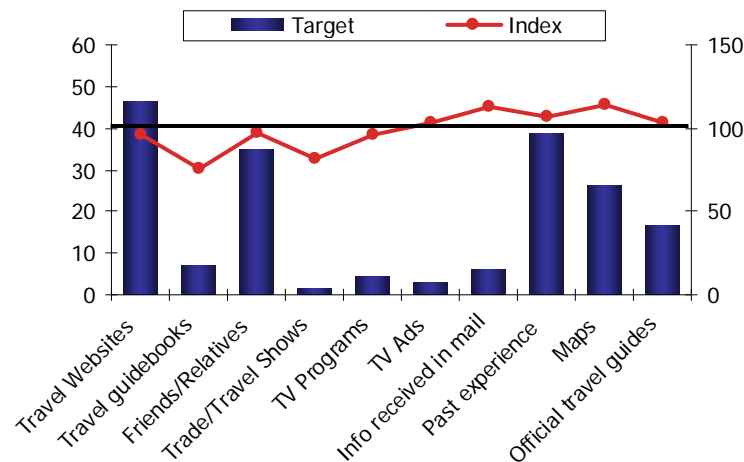
Travel Accommodation



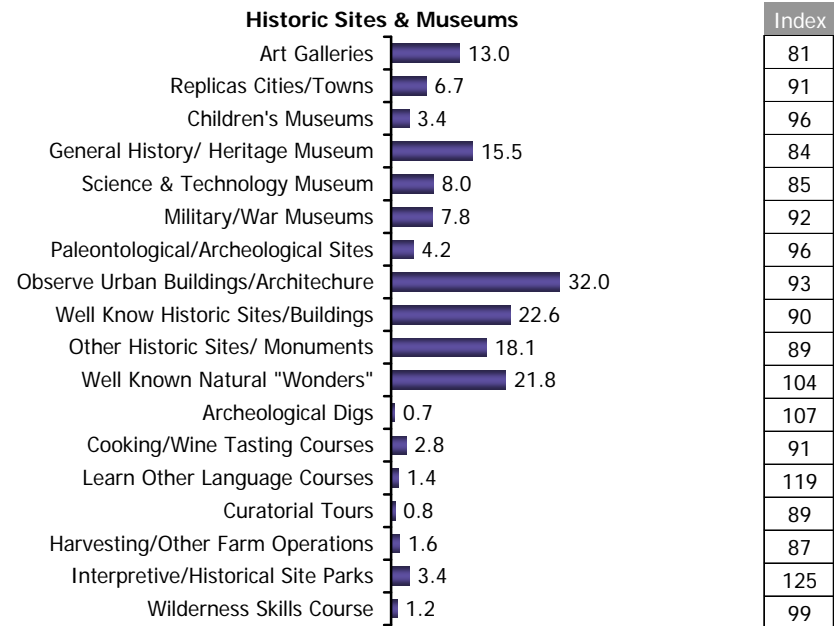
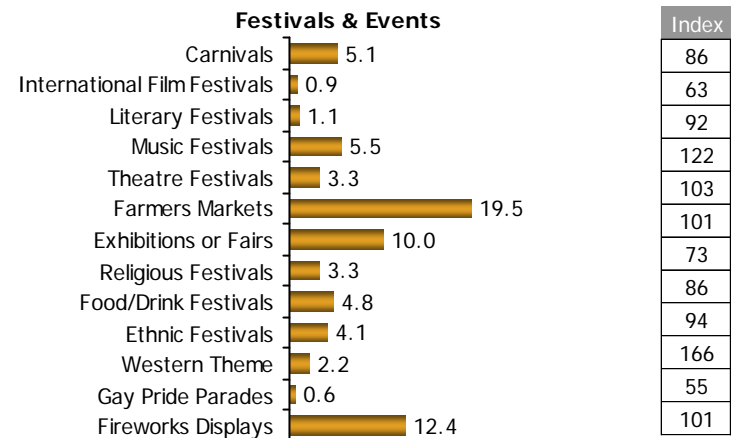
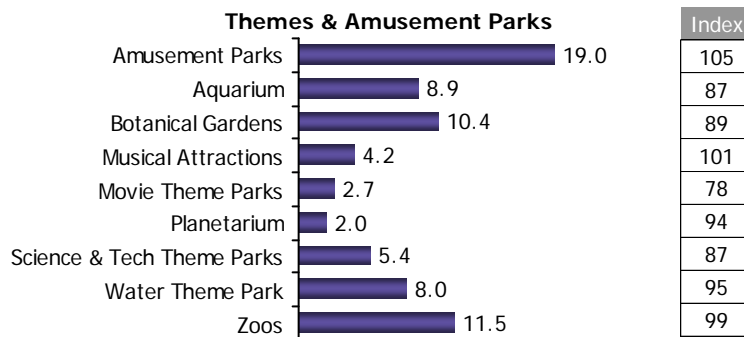
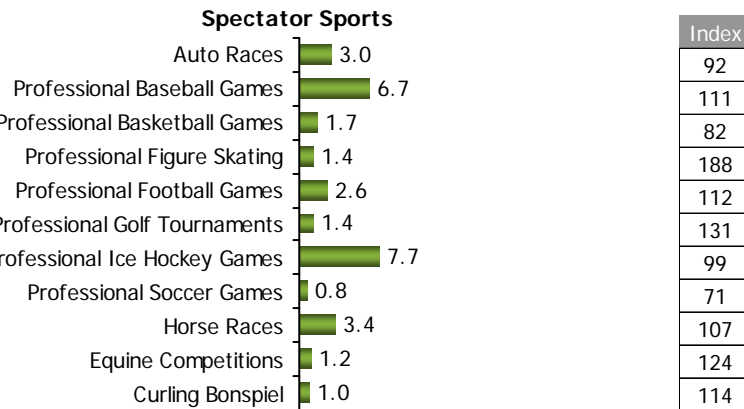
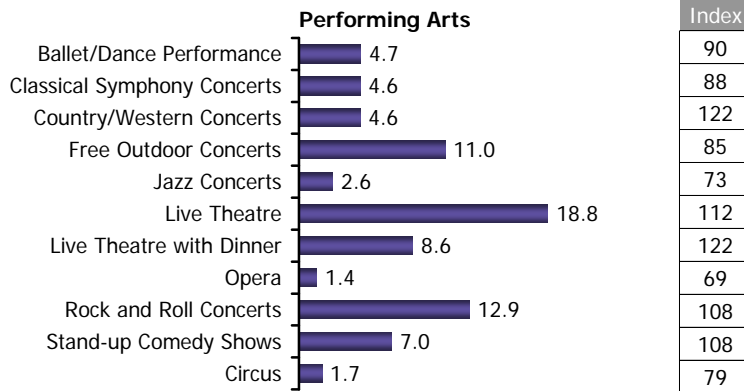
Expenditure on Last Vacation



Source of Travel Information



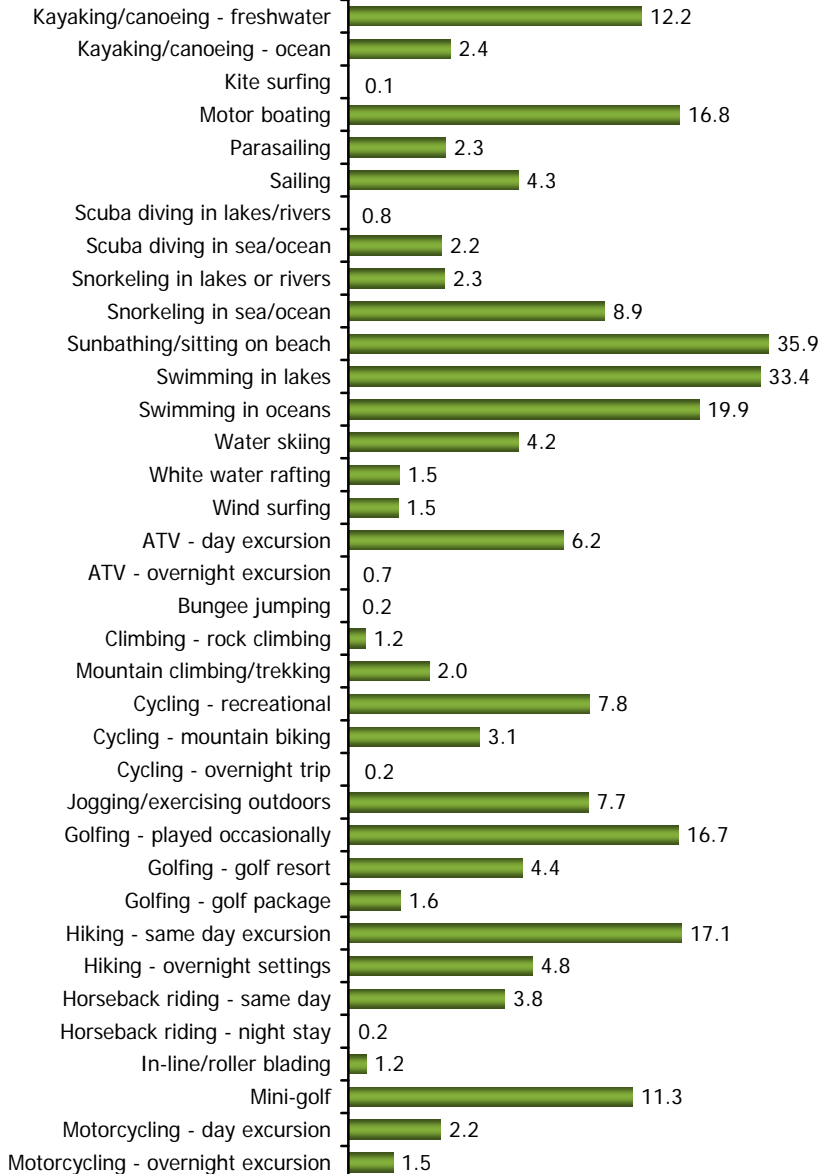
Source: BBM-RTS, TAMS



➤ % target group participates in activity
 ➤ Index – compares TG to all of ON. Index of 100 is average
 ➤ Most scaling is logarithmic for enhanced presentation



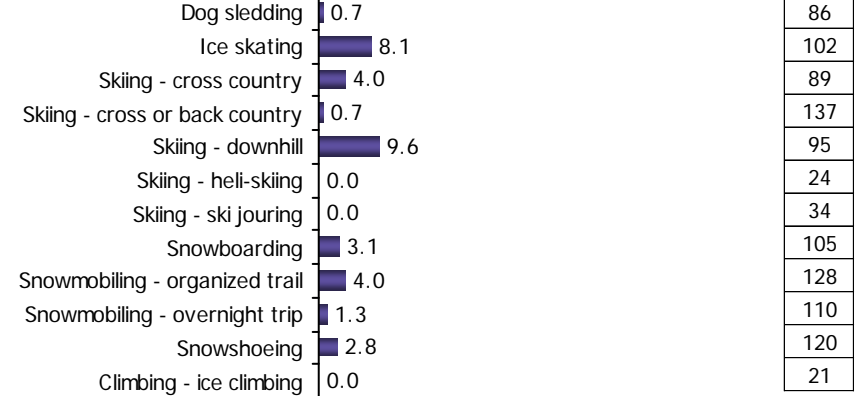
Summer Activities



Index

98
103
54
110
202
114
80
120
93
112
107
103
94
94
88
146
121
72
61
94
90
97
118
37
82
122
120
91
100
86
105
86
67
105
143
174

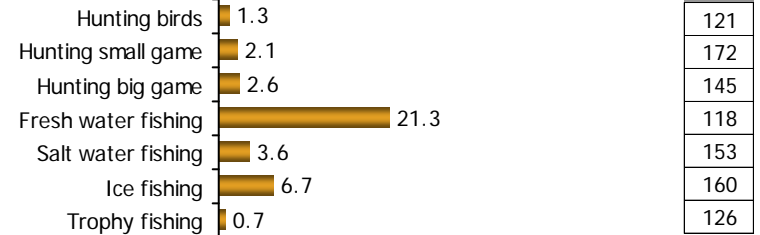
Winter Activities



Index

86
102
89
137
95
24
34
105
128
110
120
21

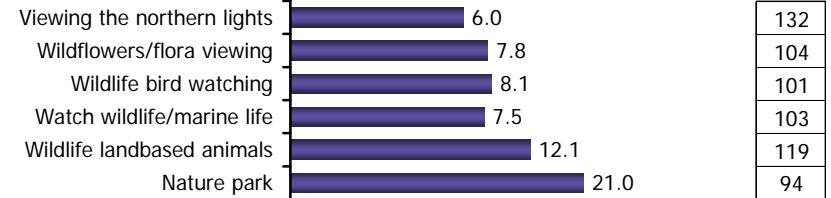
Hunting & Fishing



Index

121
172
145
118
153
160
126

Nature & Wildlife



Index

132
104
101
103
119
94

- These retirees are happy in the city or the country, filling their days with both favourite and new activities
- They like to have balanced trips that incorporate busy days of sight-seeing and plenty of time to relax and soak up the scenery

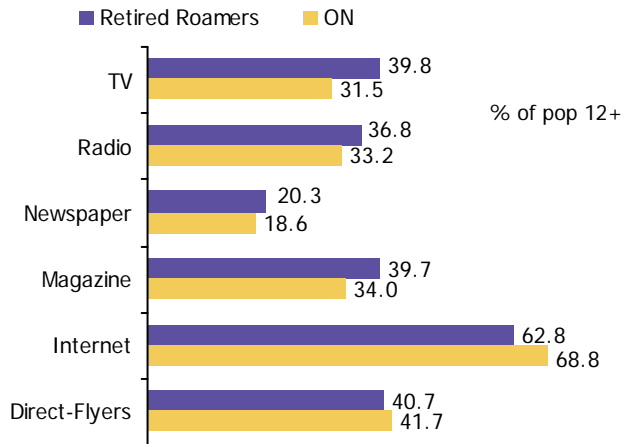
Source: TAMS



Media Overview

Ontario's Retired Roamers love their traditional broadcast and print media. They have a genuine interest in news and current events and access information via TV, radio, and newspaper. Both their home and their garden are of particular importance to this group, as indicated by their TV show and magazine choices. Much of their media consumption is driven by their age and lifestage: reading *Prevention* and *Zoomer* magazines, and listening to golden oldies. Also reflecting their mature age, Retired Roamers are not heavy users of the internet. They display below average rates for almost all online activities, although they will buy some attraction tickets online. On the flip side, this group has a positive opinion of flyers, and in fact they use flyers, catalogues, and mail order for making purchases.

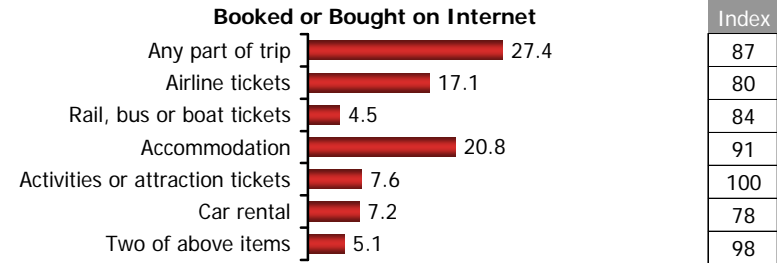
Media Usage



*TV, Radio & Newspaper Measure "Heavy Usage Tercile" Magazine Measures "Read Yesterday", Internet Measures "Yesterday" Direct Measures "Somewhat Favourable"

Source: BBM-RTS, TAMS

Booked/Bought Travel on the Internet



- This group is slightly weaker than average when it comes to booking most aspects of their travel online
- Occasionally they can be convinced to make small purchases – like theatre tickets – on the internet

Media Highlights

Television: Heavy viewers; figure skating, golf, auto racing, game shows, baseball, *The Weather Network*

Radio: Heavy listeners; country, adult standards, AOR/mainstream rock, golden oldies

Newspapers: Moderate readers of dailies and heavy readers of community papers; classifieds, editorials, food sections

Magazines: Heavy readers; Senior Citizens, Nature & Ecology, Travel & Tourism genres

Internet: Light users, 24% do not use at all; many have dial-up. Activities include research, reading the news, instant messaging

Direct: Very favourable to flyers delivered to the door or in the mail; above-average users of store catalogues, coupons and mail order



Communication Themes

- ✓ Canada & Ontario – These are proud Canadians and Ontarians, so emphasizing this will appeal to their sense of national pride, specifically focused on Ontario
- ✓ Simple & Stress Free – Complexity and stress are not appealing. They want to get away and keep things simple
- ✓ Cost Conscious – Price is important to these budget-conscious travellers

Travel Behaviours

- ✓ They travel all year and are always willing to pick up and go on short notice. They tend to seek out more cost-saving options
- ✓ Destinations: They like to travel to familiar destinations within Canada. Parks and small towns and cities appeal
- ✓ Information: They use travel guides and rely on their past experiences and recommendations, as well as mailed information

Creative Messaging

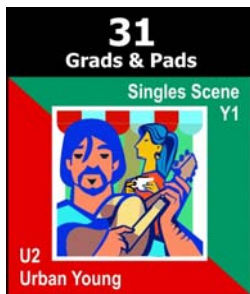
- ✓ Active seniors 65+ who are looking to get in touch with nature, or to have a taste of big city life, and are not tied down by kids or jobs
- ✓ Keep it familiar. They do not want to discover new territory or break new ground, but rather prefer what they know and what they like
- ✓ Ecological awareness is high, so activities that align with this and companies that align with this will appeal

Touch Points

- ✓ TV Advertising during golf, auto racing, figure skating, game shows or baseball on TV
- ✓ Radio advertising, especially on country, adult standards and oldies stations
- ✓ Magazine ads in seniors, nature & ecology or tourism titles
- ✓ Ads in community papers
- ✓ Favourable to direct mail
- ✓ Avoid the internet



Core Clusters



3.4% of Ontario Households (169,221)
3.2% of Ontario Total Population (422,724)
3.3% of Ontario 18+ Population (346,707)
3.3% of Ontario 15+ Population (362,540)
3.3% of Ontario 12+ Population (376,112)



Target Group Highlights

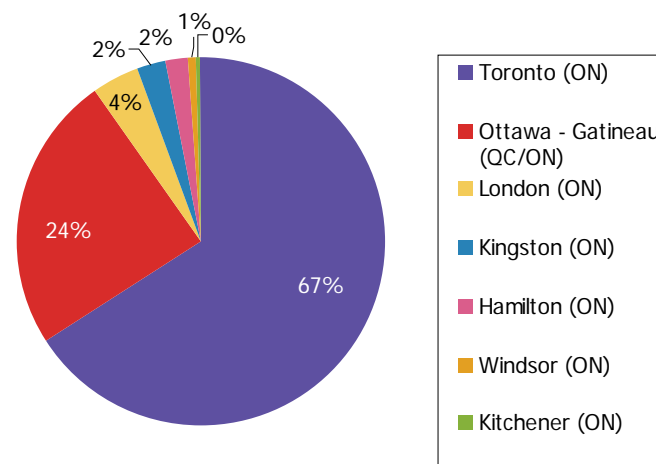
- These young up-and-comers enjoy exploring new places and cultures with their friends or partners
- Trips are typically long weekends with friends visiting nearby cities or affordable places in the countryside
- They like to use official travel guides to give them a good deal on music festivals, sports and outdoor activities such as white water rafting
- They live mostly in Toronto and the other university cities such as Ottawa, London and Kingston
- They rely on the guide books (including official) and the internet for most of their information, including online newspapers, magazines and radio streaming



Demographic Highlights

Lifestage: Young (under 34) couples and singles, many just starting professional careers
HH Size: Small; 44% with 1 person
Housing Type: Renters; old (pre-1946) semi-detached or row houses, low-rise apartments, detached duplexes
Education: 44% have a university degree (twice the average)
Job Type: White collar; above average for business, social science, service, and scientific jobs
Commuting: Above average for using public transit (33%), walking (21%) and cycling (5%)
Diversity: Average at 28% immigrant population; Chinese (7%), Black (4%), South Asian (4%)
Average HH Income: \$81,478 (8% lower than average)

Top Census Metropolitan Areas (CMAs)



Lifestyle Overview

Ontario's Young Go-Gos are highly-educated urban singles and couples leading active social lives. Their households generally consist of one or two residents, although a small number have children. As a result, while their income is below the Ontario average, their disposable incomes are actually quite robust given their small household size, and the fact that most do not own their homes or have children. While they are focused on building their careers in business, health, and social science, they make an effort to lead busy, well-rounded lives outside of the workplace. They are a cultured, health focused, and social group, attending art galleries, the ballet, and food and wine shows, going to the gym or out for a jog, and meeting up with friends at restaurants, bars and clubs.

Top Markets – Census Subdivisions

Name	Target Group		Market		Penetration	
	# of HHds	% of Mkt	# of HHds	% of Mkt	% Pen	Index
Toronto (ON)	97,891	65.97	1,062,592	21.23	9.21	311
Ottawa (ON)	36,205	24.40	352,502	7.04	10.27	346
London (ON)	6,261	4.22	158,312	3.16	3.95	133
Kingston (ON)	3,658	2.46	51,105	1.02	7.16	241
Hamilton (ON)	2,467	1.66	211,923	4.23	1.16	39
Windsor (ON)	1,337	0.90	94,481	1.89	1.42	48
Waterloo (ON)	379	0.26	42,530	0.85	0.89	30
Burlington (ON)	200	0.13	71,298	1.42	0.28	9
Legend	Low Index (I<80)			High Index (I>120)		



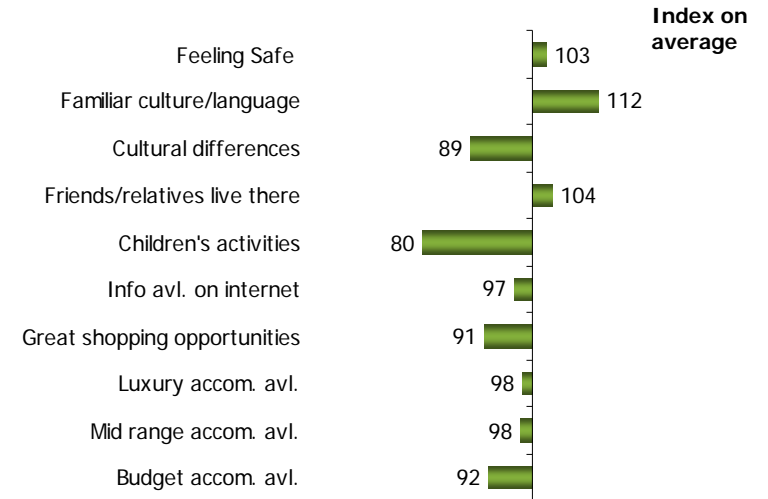
Travel-Oriented Social Values

Key Travel-Related Social Values			
Value	Index	Value	Index
Adaptive Navigation	116	Importance of Price	93
Aversion to Complexity	73	Need for Escape	124
Canadian Identity	84	Need for Status Recognition	70
Confidence in Advertising	71	Penchant for Risk Taking	122
Confidence in Big Business	64	Primacy of the Family	58
Confidence in Small Business	76	Pursuit of Originality	125
Control of Destiny	111	Pursuit of Novelty	94
Cultural Fusion	159	Risk Aversion	92
Ecological Lifestyle	124	Search For Roots	117
Financial Concern Re Future	96	Technological Anxiety	96
High Index (110+)		Low Index (90/less)	

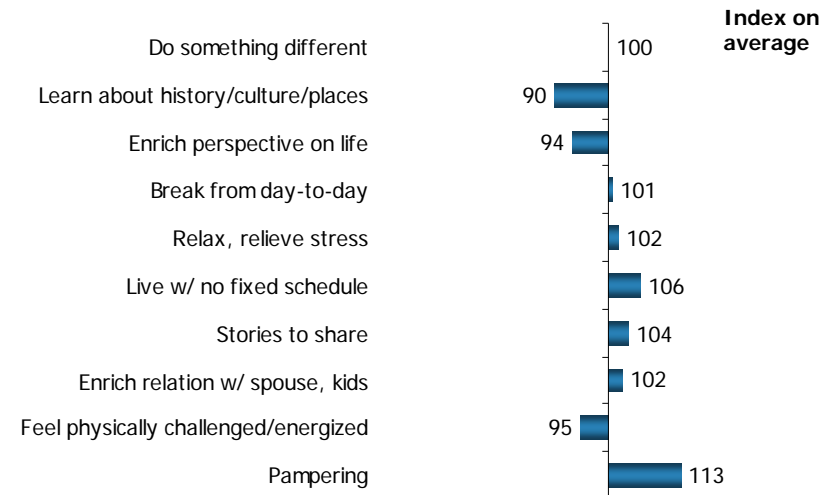
Social Values Overview

Not surprisingly, Young Go-Gos display a number of “youthful” values. They actively seek out new experiences and opportunities to sample and learn from other cultures, particularly in social settings with groups of friends or a significant other. When they travel, they prefer to set their own itineraries, which allow them to see everything they want while providing ample time for spontaneous adventures. They are enthusiastic shoppers, and enjoy being the first to try out the latest trends in products and services, particularly because they like their status as “early adopters,” sharing their best and worst experiences with friends and family. They are concerned about the environment and try to buy products and travel services that are socially-conscious and environmentally-friendly. Still, aesthetics play a key role in the choices of these idealistic, detail-oriented consumers.

Vacations – Conditions Sought



Vacations – Benefits Sought





Personal Travel Highlights

Type of Trip: Long weekends and week-long trips to rejuvenate and see new places

Destinations: Nearby cities and popular scenic regions, the occasional sun destination trip, occasionally Europe or Asia

Travel Mode: Car travel is most frequent, but fly once or twice a year to visit sun destinations or family/friends in distant cities

Accommodation: B&Bs, Friends/relatives, all-inclusives

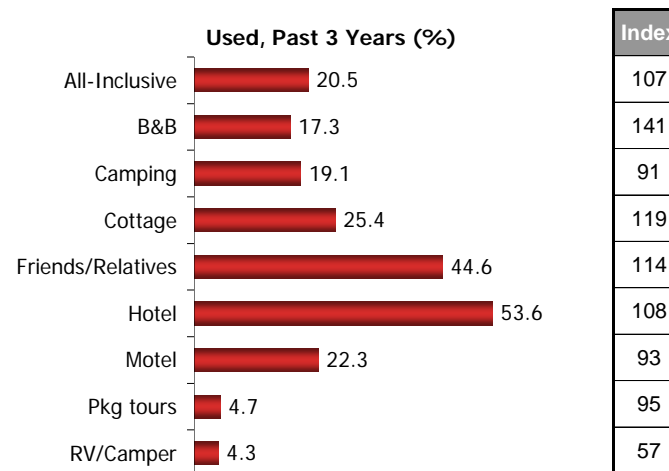
Activities/Attractions: Wide range of cultural attractions, professional sports, music festivals, white water rafting, SCUBA diving, and observing animals in the wild

Expenditure: Try to find deals/discounts on accommodation and transportation, but spend freely on activities

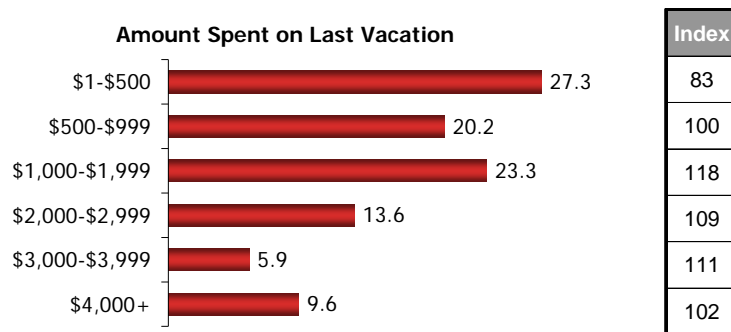
Seasons: Typically off-peak, and over summer long weekends

Information Sources: Official travel guides and other guidebooks, past experience, TV programs, recommendations

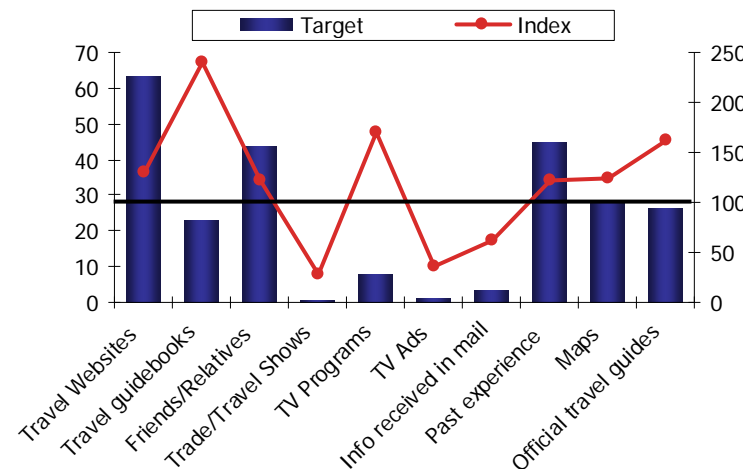
Travel Accommodation



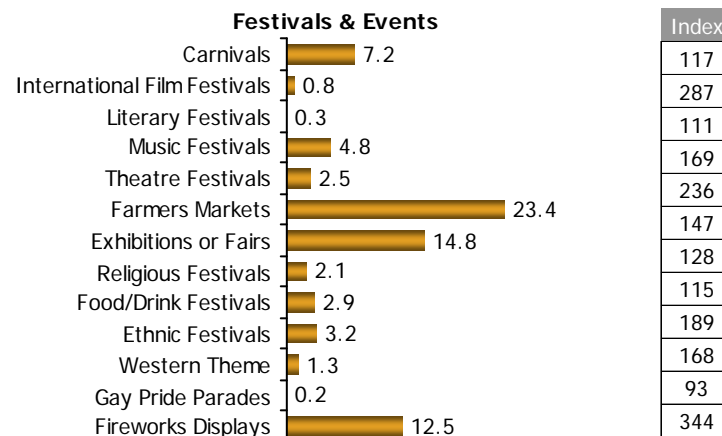
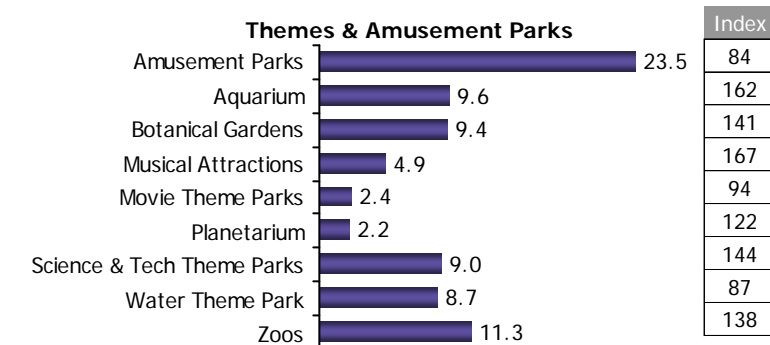
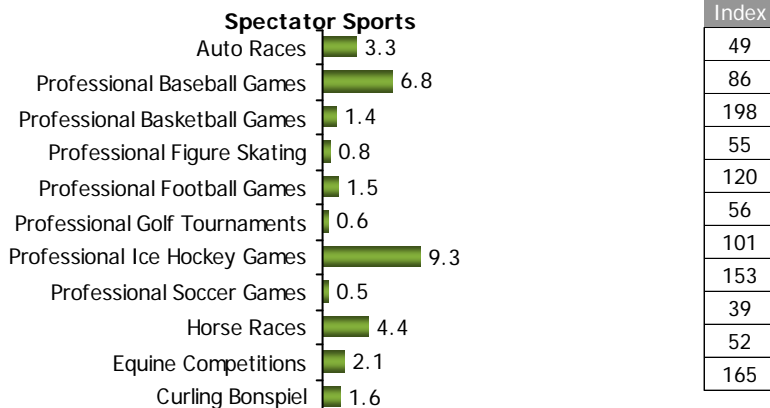
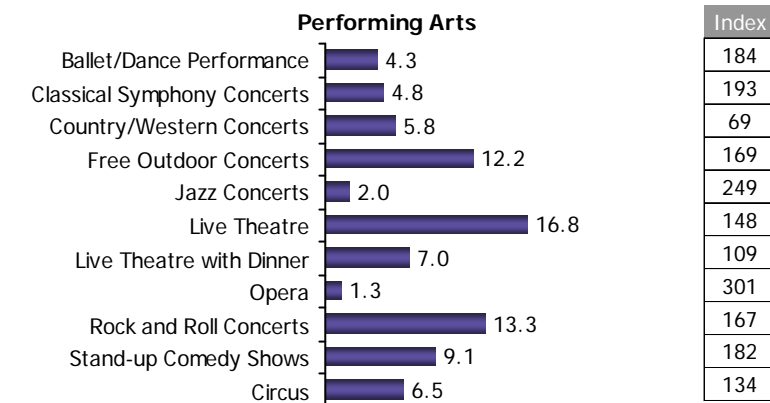
Expenditure on Last Vacation



Source of Travel Information



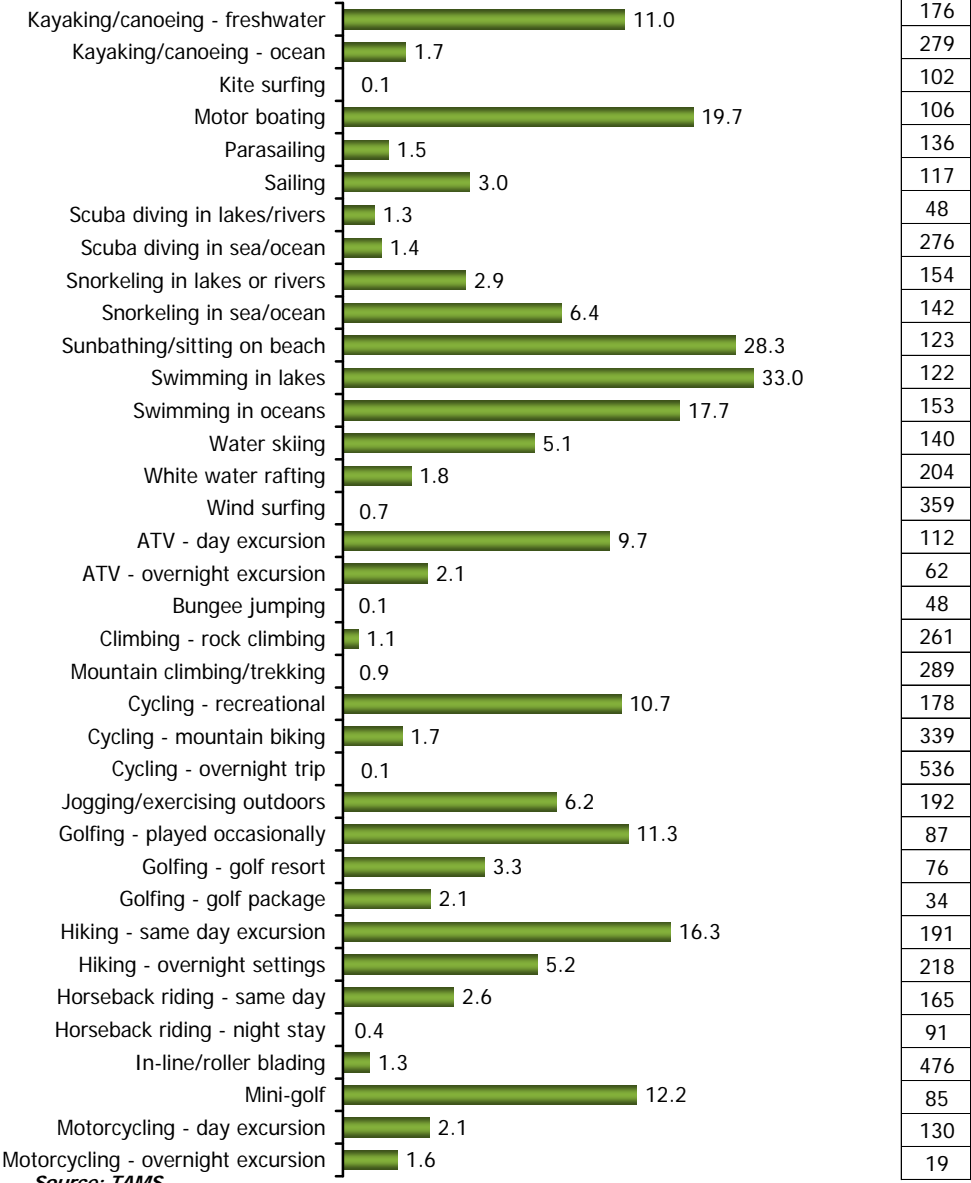
Source: BBM-RTS, TAMS



- % target group participates in activity
- Index – compares TG to all of ON. Index of 100 is average
- Most scaling is logarithmic for enhanced presentation

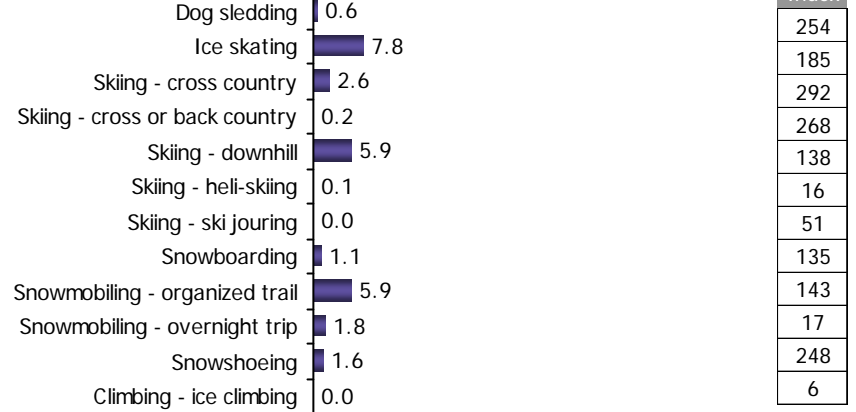


Summer Activities

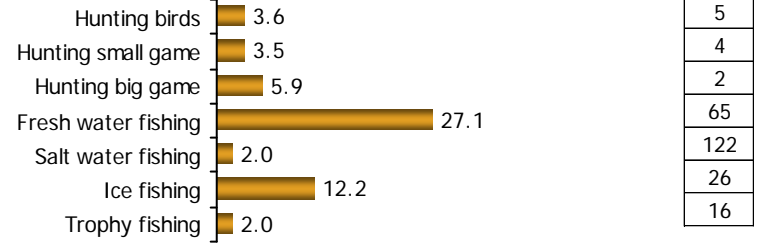


Source: TAMS

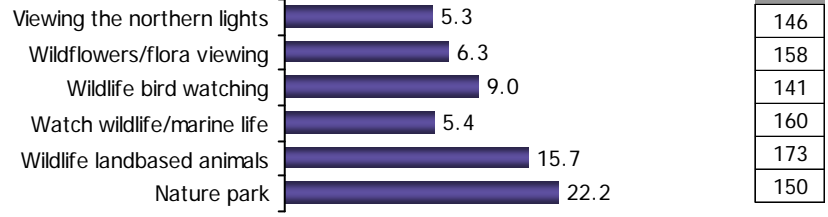
Winter Activities



Hunting & Fishing



Nature & Wildlife



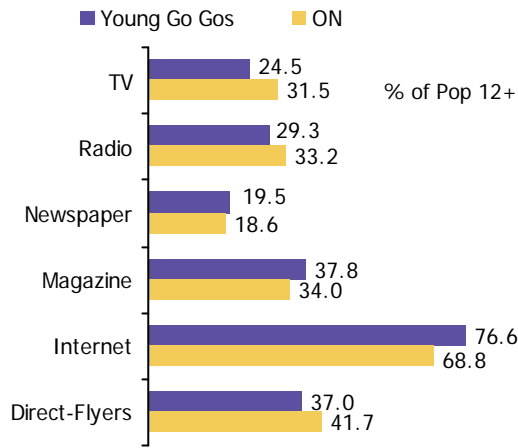
- Whether visiting the city or the country, this group is likely to take in a diverse variety of attractions
- These urbanites love an opportunity to see wildlife, catch a glimpse of the northern lights or spend a day at the beach



Media Overview

While Young Go-Gos are light to moderate users of broadcast and most print media, preferring to use the internet as their go-to source for all sorts of information, communication, shopping and entertainment. Still, even their traditional media preferences tend to reflect their lifestyle choices. Young Go-Gos further their interest in culture by listening to jazz and classical/fine arts on the radio, and reading the entertainment section of the newspaper. These are well-rounded individuals with interests in sports, food and lifestyle, and current events, which is evident in their preference of magazines and TV stations. They tend to be unfavourable to direct mail and flyers delivered to the door, but are likely to search out much of the same information on the internet.

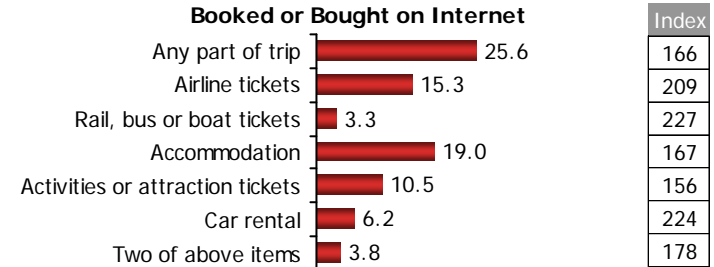
Media Usage



*TV, Radio & Newspaper Measure "Heavy Usage Tercile" Magazine Measures "Read Yesterday", Internet Measures "Yesterday" Direct Measures "Somewhat Favourable"

Source: BBM-RTS, TAMS

Booked/Bought Travel on the Internet



- These active travelers enjoy the convenience of booking all or most of their travel itineraries on the internet

Media Highlights

Television: Light viewers; basketball, documentaries, sitcoms, news/current affairs; Bravo!, CBC Newsworld, MuchMoreMusic

Radio: Lighter listeners; jazz, classical/fine arts, specialty, news/talk, and sports stations

Newspapers: Moderate readers of dailies and light readers of community papers; computer/high tech, business/financial, food, international news, entertainment sections

Magazines: Heavier readers; alternative weeklies, nature/ecology, current affairs, fashion, technology genres

Internet: Heavy users; high-speed at home and work; perform many activities online including podcasting, reading the news

Direct: Very unfavourable to flyers delivered to the door or in the mail; above average use of internet in shopping, average use of coupons and mail-order



Communication Themes

- ✓ Open Minded: Deep interest in other cultures and living an Ecological Lifestyle.
- ✓ Stress Relief: Their fast-paced, youthful lives can get stressful, and many feel a need for escape and rejuvenation
- ✓ Control Seekers: They look to exercise control over all aspects of their lives and are concerned about original touches and being unique.

Travel Behaviours

- ✓ Weekenders who like to get away after a tough week at the office on short trips as well as the occasional escape to somewhere warm
- ✓ Destinations: Popular scenic locations as well as periodic trips to sunny destinations. Likely to seek out eclectic accommodations like B&Bs or the homes of friends and relatives (or friends and relatives of friends and relatives!)
- ✓ Information: Online information is key, and they also go by official and non-official travel guides, past experience, and recommendations

Creative Messaging

- ✓ Young, hip urbanites in the under-35 age range who lead active social lives and will probably be looking for ways to mingle
- ✓ They like thrills and excitement and are willing to take risks
- ✓ Other cultures and the mystique of discovery will be of interest
- ✓ They are not overly concerned about price

Touch Points

- ✓ Online communications; websites that well-designed and beautiful to look at
- ✓ Ads in national and local newspapers, specifically in the business, tech and entertainment sections
- ✓ Ads in food, fashion and current affairs magazines
- ✓ Public transit ads (in areas where applicable)
- ✓ Less receptive to flyers