

Introducing Nature Lovers...

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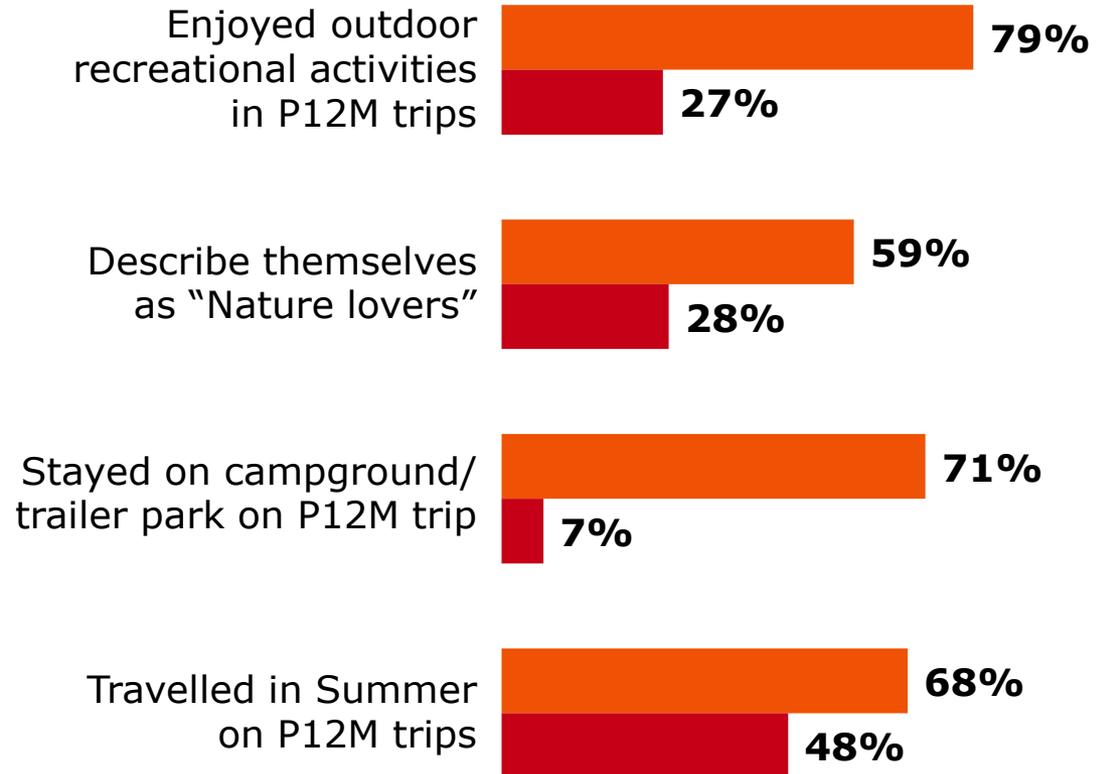
Nature Lovers

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

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



Key Differentiators



■ Nature Lovers
■ Total Travellers

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

Who Are Nature Lovers?

	Nature Lovers %
Age:	
18-34 Years	35
35-54 Years	42
55 Or Older	23
Gender:	
Male	45
Female	55
Household Composition:	
Live alone	11
Couple with no children	36
Any children 18 or younger	43

	Nature Lovers %
Occupation Status:	
Employed	63
Retired	12
Homemaker/ child caring	9
Student	5
Unemployed/ disability	7
Ethnic Status:	
Born outside Canada/ US	10
Visible minority	5

- Well Above Average
- Below Average
- Well Below Average

Value Metrics

	Nature Lovers
Average Annual Household Income	\$70,547
Average Annual Household Travel Budget	\$2,172
Average Number Of Trips In Past 12 Months	3.1
Average Trip Length (in days)	5.4
Average Party Size Per Trip	3.7
Average Spend Per Person In Travel Party	\$382
Maximum Spend Per Trip	\$1,753

 Above Average
 Below Average

Travel Attitudes

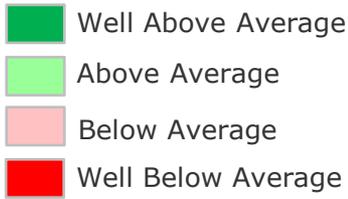
– Top-2-Box Agreement (Agree Strongly/Somewhat)

	Nature Lovers %
A family vacation is an important time to make family memories	87
I enjoy sharing stories back home after my travels	82
I tend to choose places to visit where I will be awe-struck by the sheer beauty of nature, land, mountains, seas and wildlife	76
I like to visit small towns and villages when I travel	73
I love travelling to places off the beaten path	73
When I'm on vacation, I just do whatever I want, however I want	69
I like to take my time at historical sites or museums	69
I like to see local architecture or city scapes that are different from my own	67
I find it enriching to be exposed to the local customs and routines of people in another country	66
When travelling, I like to walk around and do everyday things like eating and socializing, just as the locals do	66
I am much more carefree while on vacation than I am at home	61
I prefer to thoroughly plan my trips in advance	61
I am comfortable travelling with groups of people	41
When I travel, I like to experience arts and culture	40
Shopping is an important part of the travel experience for me	30
To the extent possible, I plan my pleasure travel around visiting the world's most famous sites and destinations	29
When travelling, I prefer to eat food that is like the food I eat at home	27
I tend to prefer travel destinations that I know fairly well	24
When I travel, I am more interested in understanding the past than in experiencing culture as it exists now	24
I tend to get nervous or anxious when I travel	20
One thing that makes me uncomfortable about travelling is having to adjust to unfamiliar locations, foods, people and languages	19
When choosing a pleasure travel destination, I am influenced by what is currently popular	13

Lifestyle Attitudes

– Top-3-Box Agreement (8/9/10 out of 10)

	Nature Lovers %	
My life revolves around my family	61	
I am generally an optimistic person	53	
I consider myself to be youthful in spirit	48	
I never seem to have enough time to accomplish all I need to in a day	47	
I am in tune with nature	46	
I am a confident person	44	
I am completely open to diverse cultures, lifestyles and ideas	44	
I need to escape my everyday life from time to time and seek new experiences	44	
I make a point of taking time to relax and unwind	43	
I spend most of my leisure time at home	43	
I often seek solitude and quiet times for contemplation	34	
I am one of those who likes to have everything planned in advance	32	
People tend to look to me for advice	32	
It is important to me to make a good impression on others	30	
I have lots of friends	28	
I love to be spontaneous	28	
I am more adventurous than most of my friends	28	
I feel financially secure	25	
I am more physically active than most people	25	
My life is too stressful	23	
I'm usually the first among my friends to try something new	17	
I love the fine arts and high culture	15	
I consider myself a follower rather than a leader	11	
I tend to be the life of the party	10	



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Activity Profile (NETS)

Trips Taken During Past 12 Months

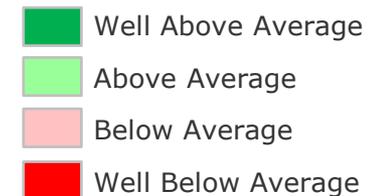
	Nature Lovers	
	Total Trips	Ontario Trips
Any Activities on Trips Taken in Past 12 Months:	%	
Camping and related outdoor activities	79	75
Beach, resort, spa and water	49	45
Visiting friends/ relatives and social events	46	36
Museums, history, galleries, sightseeing and knowledge	45	37
Botanical/ nature parks, scenic landmarks and related learning	43	38
Shopping	35	27
Touring	33	29
Culinary (fine dining and wineries)	28	21
Major tourist attractions (amusement/ theme parks, zoo, aquarium)	25	14
Cultural events/ festivals	17	13
Sporting events (spectator, player), golf	10	8
Nightclubs and places of entertainment	7	7
Visiting casinos or other gambling	7	8

Well Above Average
 Below Average
 Well Below Average

Activity Profile (Detail)

Trips Taken During Past 12 Months

	Nature Lovers	
	Total Trips	Ontario Trips
Any Activities on Trips Taken in Past 12 Months:	%	
Camping	66	64
Visiting friends and relatives	41	32
Visiting a beach	40	38
Hiking / climbing	36	36
Shopping	35	27
Visiting scenic landmarks	33	25
City sightseeing on your own	28	23
Dining in fine restaurants	26	18
Visiting places of historical interest	25	17
Visiting small towns and villages	24	19
Visiting national or provincial nature parks	24	21
Fishing	23	24
Wildlife / bird watching	22	22
Attending family / social event (e.g., wedding, reunion)	18	11
Touring by car or RV	17	16
Visiting museums or galleries	17	13
None of these / some other activity	17	9
Visiting theme/amusement park	17	11
Boating / sailing	15	13
Kayaking or canoeing	14	20
Water activities (e.g., waterskiing, diving, windsurfing)	13	9
Visiting a zoo, aquarium	13	6
Attending theatre, concerts or dance shows	10	7
Visiting / staying at a resort	10	5



Main Activity On Trips Taken During Past 12 Months

Main Activity:	Nature Lovers	
	Total Trips	Ontario Trips
	%	
Camping and related outdoor activities	53	55
Visiting friends/relatives and social events	33	24
Beach, resort, spa and water	14	8
Museums, history, galleries, sightseeing and knowledge	10	8
Botanical/nature parks, scenic landmarks and related learning	7	5
Major tourist attractions (amusement/ theme parks, zoo, aquarium)	7	6
Cultural events/festivals	5	4
Touring	5	3
Sporting events (spectator, player), golf	3	3
Culinary (fine dining and wineries)	2	3
Shopping	2	2
Visiting casinos or other gambling	1	2
Nightclubs and places of entertainment	0	1

 Well Above Average

Activity Profile – Nature Lovers

- Relationship Between Main and Other Activities

	Main Activities		
	Camping	VFR	Beach
Other Activities	%		
Hiking climbing	45	10	14
Visiting a beach	32	17	100
Fishing	26	7	11
Wildlife/bird watching	26	5	14
Visiting scenic landmarks	24	12	23
Visiting national or provincial nature parks	18	9	14
Visiting places of historical interest	16	9	10
Visiting small towns and villages	15	13	17
Visiting friends and relatives	15	100	12
Shopping	15	26	32
Kayaking or canoeing	13	3	5
City sightseeing on your own	13	14	20
Boating / sailing	10	8	9
Water activities (e.g., waterskiing, diving, windsurfing)	10	5	15
Touring by car or RV	9	12	16
Dining in fine restaurants	7	18	29
Camping	100	18	20
Visiting museums or galleries	7	10	6
Visiting a zoo, aquarium	3	8	12
Visiting an amusement or theme park	5	7	16
Visiting a garden attraction (e.g., botanical gardens)	2	6	14

Benefit Profile

Trips Taken During Past 12 Months

	Nature Lovers	
	Total Trips	Ontario Trips
Travel Benefits Sought On Trips In Past 12 Months	%	
To relax and relieve stress	71	68
To have fun and be entertained	60	58
To stay connected with family	57	44
To create lasting memories	56	51
To see or do something new and different	43	36
To enrich your relationship with partner/ children	43	39
To explore and learn	37	33
To re-energize	35	36
To renew personal connections with people (other than family)	26	25
To seek solitude and isolation	25	27
To gain knowledge of history, other cultures	14	9
To be challenged physically	14	17
To experience different ways of life	13	9
To meet new people	12	10
To stimulate your mind / be intellectually challenged	9	11
To be pampered	5	3

 Well Above Average

 Above Average

Sources Used To Plan Trips

	Nature Lovers	Difference vs. Total Travellers
	%	
Friends/family/colleagues (Net)	42	+7
Brochures/pamphlets	18	+1
Travel guides/books	9	-1
Articles/features in travel magazines	4	-3
Own/previous experience	23	+4
Information from a specific attraction	6	-1
Automobile Associations	9	±0
Travel agent (in person)	2	-3
Airline	1	-3
Travel programs on TV	3	-3
TV ads	4	-1

Q. Thinking about all of the overnight pleasure trips you have taken within Ontario during the past year or so, which of the following information sources did you use when planning your travel? If you have not taken an overnight pleasure trip within Ontario, please think about your last overnight pleasure trip.

	Nature Lovers	Difference vs. Total Travellers
Internet Sources Used:	%	
Any Internet (Net)	78	-4
- Accommodation websites e.g., hotel	35	-6
- Online travel agencies	23	-11
- Airline websites	14	-10
- Official destination websites, e.g., VisitFlorida	23	±0
- Review sites	15	-6
- Online blogs	5	-2
- Social media	5	-1
- Group buying sites, e.g., Wagjag	4	±0
- Travel apps	2	-1

Q. What kind of Internet sources, if any, did you use to plan your trips?

Nature Lovers Population Projections

Geographic Markets

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total Canada	1,273,265	9.5%
Ontario	831,520	9.2%
GTA	265,047	6.7%
Other Ontario	561,276	11.1%
Quebec	379,381	9.9%
Montreal	259,850	9.0%
Other Quebec	119,531	12.6%
Manitoba	67,561	12.5%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Major US Markets		
Philadelphia	83,152	2.0%
Boston	124,728	2.5%
Chicago	155,910	2.4%
New York City	51,970	0.7%
Washington DC	88,349	2.0%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total US	3,928,932	3.9%
States:		
Connecticut	62,364	2.3%
Delaware	46,773	6.8%
Illinois	296,229	3.1%
Indiana	306,623	6.3%
Maryland	181,895	6.8%
Massachusetts	129,925	2.3%
Michigan	478,124	6.3%
Minnesota	249,456	6.1%
New Jersey	109,137	1.9%
New York	379,381	2.8%
Ohio	348,199	3.8%
Pennsylvania	431,351	3.9%
Virginia	192,289	4.7%
Wisconsin	280,638	6.6%
Kentucky	62,364	2.1%
New Hampshire	31,182	2.0%
North Carolina	213,077	2.9%
Rhode Island	5,197	0.6%
Vermont	10,394	2.1%
West Virginia	109,137	8.1%



How To Reach Nature Lovers

Detail Media Consumption

	Nature Lovers	Difference vs. Total Travellers
% reading newspaper	36%	-30
- Daily print	52%	-6
- Daily on computer	32%	-1
- Daily on mobile	12%	+3
% reading travel section of daily newspaper	41%	-13
% reading magazine	62%	-3
- Home/garden	26%	+1
- Entertainment/music	25%	-6
- Science/geography	19%	+5
- Outdoor activities	16%	+9
- Family/parenting	14%	+3
Avg. # hrs. watch TV (reg)	12.6	-1.5
Avg. # hrs. watch PVR	2.4	-1
Ave. # hrs. watch TV online	4.9	-0.3
- Movies	49%	-1
- Crime dramas	43%	+1
- Science/nature	35%	+10
- Science fiction/fantasy	23%	+5
Avg. # hrs. listen to radio	9.1	+1.2
- News/talk	32%	-3
- Modern rock	30%	+3
- Country	30%	+8

	Nature Lovers	Difference vs. Total Travellers
% using Internet	88%	-1
- Search engine	84%	+7
- Weather	64%	+11
- Shopping	47%	-3
- Video download	32%	+4
- Specific activities (fishing, dog breeds, etc)	29%	+10
Avg. # hrs. spent browsing per week	10.5	-1.6
% using social networks	81%	+3
- Facebook	71%	+3
- Twitter	12%	-2
Avg. # hrs. spent on social networks	4.4	-0.2
% using smartphone/tablet when travelling	40%	-6
- Look up information	75%	-2
- Check review sites	17%	-8
- make reservations	19%	-5
- Use travel apps	15%	-4