Consumer Insight Research

RTO 12 – Explorers' Edge

February 5th, 2013

TNS

ONTARIO Yours to discover | OTMPC

Ontario MINISTRY OF TOURISM, CULTURE AND SPORT

Background & Overview

TNS Growth Map

Your business issues

- In February 2009, the Ontario Government issued a comprehensive report on the future of the tourism industry (Discovering Ontario). Among its recommendations were the goals of becoming one of the world's preferred destinations and doubling tourism receipts by 2020.
- The RTOs were established as one means of realizing these goals by establishing unique brands and tourism experiences and by more clearly defining Ontario's breadth of assets using a coordinated marketing approach.
- As one of Ontario's leading overnight pleasure travel destinations, and as one offering a unique and diverse set of experiences linked to nature, RTO12 has a significant role to play as part of this growth mandate.
- Localized domestic markets have been the primary source of tourism volume for RTO12, and it is anticipated that the localized focus of the marketing effort will be retained.
- Growth can be stimulated in a variety of ways:
  - Build on the behaviours of current core visitors;
  - Attract current non-visitors with aligned interests;
  - Innovate, renovate and package product to optimize growth potential among both current and prospective visitors;
  - Identify new segments and geographic markets for expansion.

69,093

2

surveys

884

variables

Geographic Coverage Of The Research

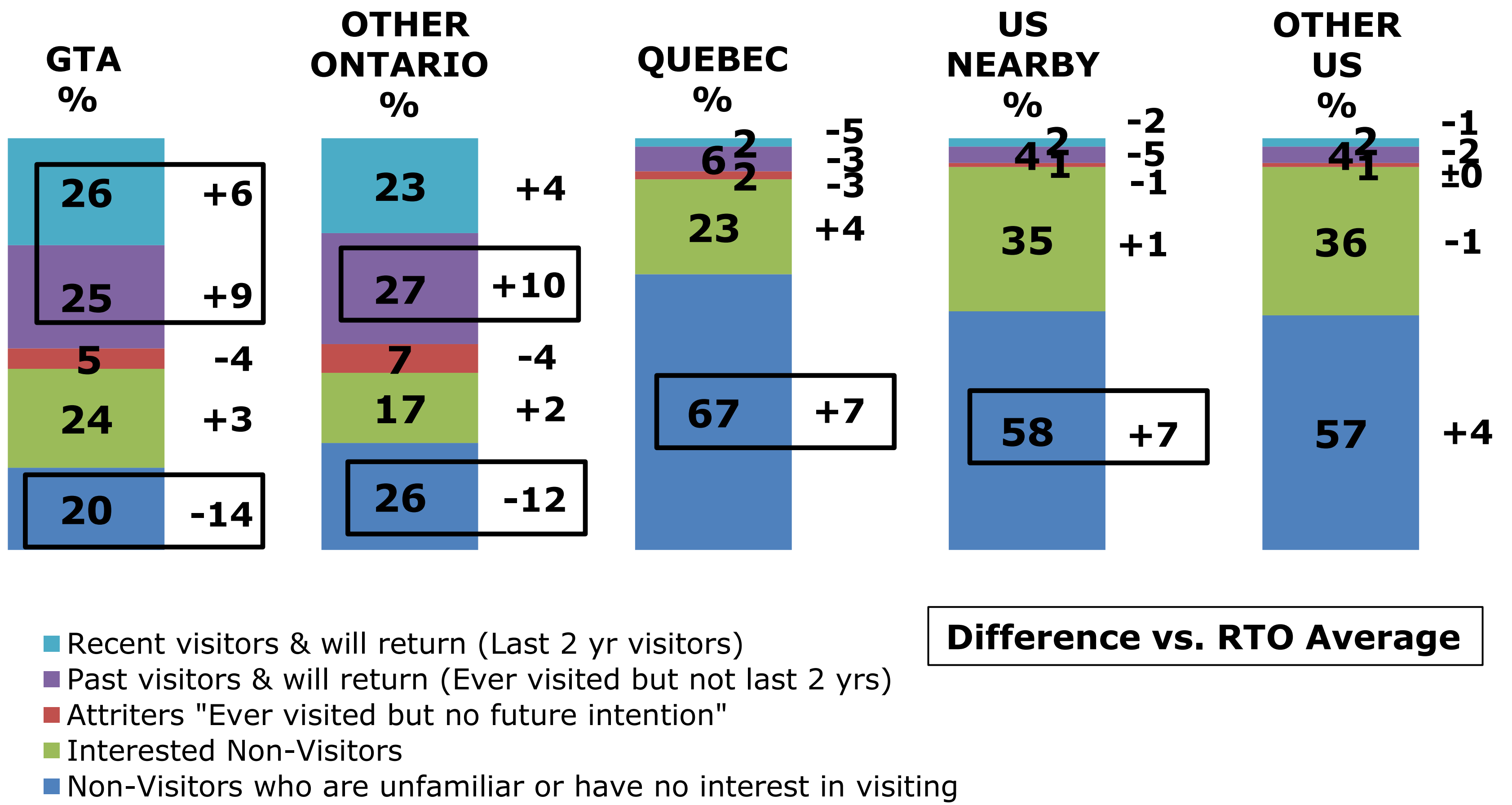
Definition Of US Source Markets

US Nearby = Pennsylvania, Ohio, and New York State

Rest of US = The balance of the US, i.e., excludes Nearby

Awareness, Interest & Visitation

Awareness, Interest & Visitation to Explorers' Edge

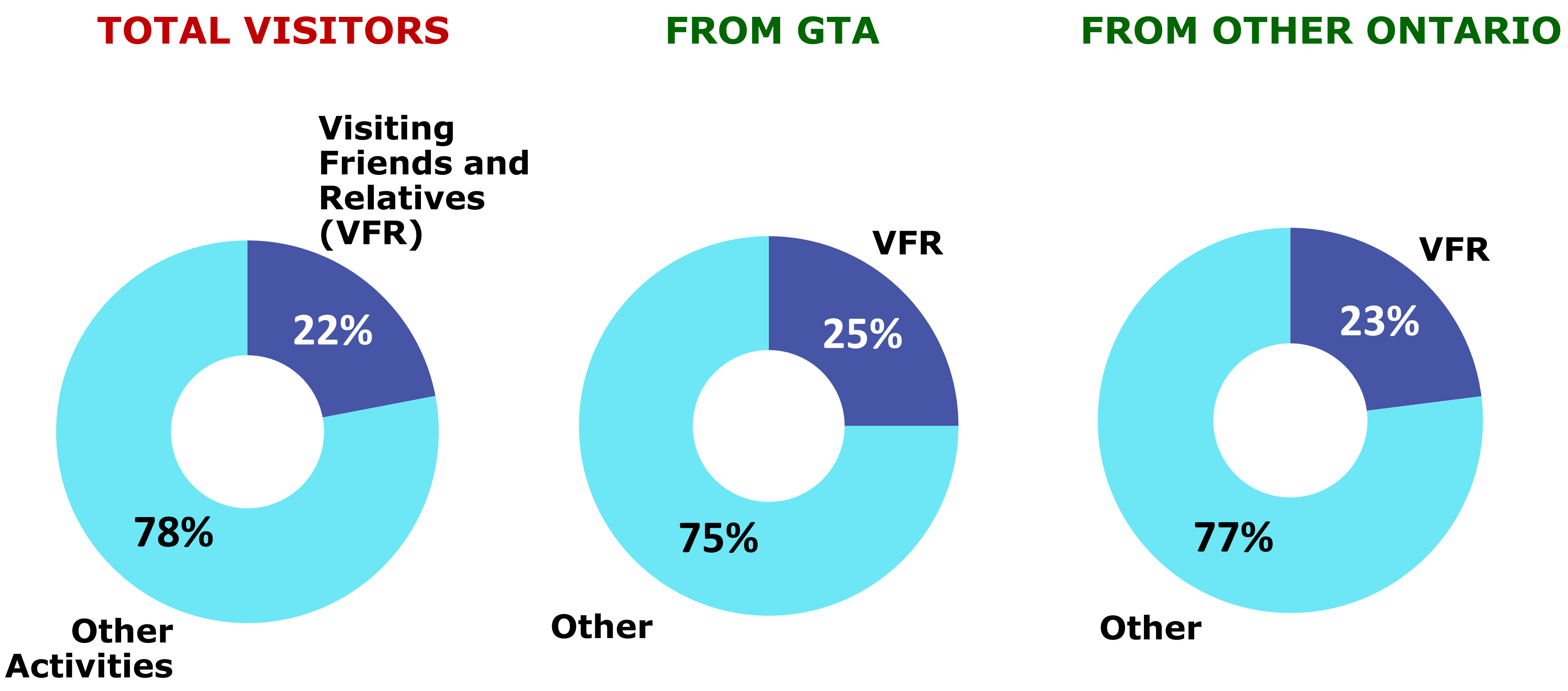


Incidence Of Visitation And Interest By Source Market

Travellers Residing In…		Percent of Travellers from each Source Market Stating… Explorers' Edge		
		Visited ….		Very Interested in Visiting in next 2 years
		Ever	In Past Two Years	
ONTARIO	%	62	28	43
- GTA		61	29	47
- Other Ontario		63	26	39
QUEBEC	%	12	3	12
NEARBY U.S.	%	8	3	12
- New York		10	4	15
- Ohio		6	2	10
- Pennsylvania		7	1	10
OTHER U.S.	%	6	2	12

Relatively high

Single Main Activity Stimulating Trip To Region



Trip Activities Among Recent Visitors To Region

	Total %	GTA %	Other Ontario %
Water- based / beach activities (Net)	**45**	**50**	**45**
- Visiting a beach	**25**	**27**	**27**
- Kayaking or canoeing	**18**	**19**	**19**
- Boating / sailing	**17**	**20**	**17**
- Water activities (e.g., waterskiing, diving, windsurfing)	**10**	**12**	**11**
Visiting Friends and Family	**33**	**33**	**36**
Camping	**23**	**25**	**23**
Hiking / climbing	**22**	**21**	**25**
Fishing	**19**	**16**	**25**
Shopping	**19**	**15**	**19**
Wildlife / bird watching	**18**	**17**	**19**
Visiting small towns and villages	**16**	**15**	**17**
Visiting national or provincial nature parks	**15**	**17**	**12**
Dining in fine restaurants	**14**	**15**	**12**
Visiting scenic landmarks	**13**	**14**	**13**
City sightseeing on your own	**10**	**9**	**12**
Visiting places of historical interest	**7**	**6**	**8**
Visiting museums or galleries	**7**	**5**	**7**
Visiting / staying at a resort	**7**	**9**	**5**

Relatively High

Evaluation of Recent Trips to the Region
Key Metrics

Visitors from….	Satisfaction with Trip		Overall Trip Value		Likelihood to Recommend Destination	
	Avg. Score/ 10		**Avg. Score/ 10**		**Avg. Score/ 10**	
TOTAL US AND CANADIAN SOURCE MARKETS	**8.8**		**8.4**		**8.5**	
GTA	**8.8**		**8.4**		**8.6**	
Other Ontario	**8.8**		**8.4**		**8.4**	

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Visitors from....	Satisfaction with Trip		Overall Trip Value		Likelihood to Recommend Destination	
	Avg. Score/ 10	% Rating 9/10	Avg. Score/ 10	% Rating 9/10	Avg. Score/ 10	% Rating 9/10
TOTAL US AND CANADIAN SOURCE MARKETS	**8.8**	**62%**	**8.4**	**54%**	**8.5**	**60%**
GTA	**8.8**	**62%**	**8.4**	**55%**	**8.6**	**62%**
Other Ontario	**8.8**	**62%**	**8.4**	**54%**	**8.4**	**60%**

Evaluation of Recent Trips to the Region
Key Metrics

Visitors from….	Satisfaction with Trip		Overall Trip Value		Likelihood to Recommend Destination	
	Avg. Score/ 10	% Rating 9/10	Avg. Score/ 10	% Rating 9/10	Avg. Score/ 10	% Rating 9/10
TOTAL US AND CANADIAN SOURCE MARKETS	**8.8** (8.2)	**62%** (50%)	**8.4** (7.8)	**54%** (41%)	**8.5** (8.0)	**60%** (50%)
GTA	**8.8** (8.6)	**62%** (57%)	**8.4** (8.0)	**55%** (45%)	**8.6** (8.0)	**62%** (49%)
Other Ontario	**8.8** (8.7)	**62%** (60%)	**8.4** (8.1)	**54%** (47%)	**8.4** (7.9)	**60%** (48%)

(Average RTO scores are shown in brackets)

Relatively High

Perceptions

Explorers’ Edge Offer

The Offer

- This Region offers endless opportunities for exploration and adventure. It is a special place where nature and civilization meet in an unparalleled landscape defined by water, rugged earth and sky. The resulting breadth of experiences is second to none whether one wishes to to rest, rejuvenate, reenergize or meet new challenges.
- Nature is at the centre of the offer, but the brand’s direction is about instilling appreciation of the diversity of experiences that exist within the Region and encouraging a desire to explore in all four seasons.

Explorers’ Edge’s Strategic Assets

1. Algonquin and other parks
2. Resorts and spas
3. Culinary experiences
4. Outfitted outdoor adventures
5. Art galleries and studios
6. Georgian Bay Biosphere, shoreline and islands.
7. Fishing and hunting
8. Premier cottage country
9. Trails and biking
10. Golf and outdoor sports
11. Festivals & events
12. Towns and villages of interest
13. Lake cruises, boating and water activities
14. Equestrian centres and trails

Perception Of Explorers’ Edge
Average Score For Core Offer Attributes Among Those Familiar

	GTA	Other Ontario	Quebec	Nearby US	Other US
Has impressive scenery and landscapes	**8.9**	**9.0**	**6.8**	**7.7**	**7.2**
A great place to enjoy boating	**8.9**	**9.0**	**7.2**	**7.8**	**7.3**
A great place for enjoying outdoor activities	**8.9**	**9.0**	**6.5**	**7.7**	**7.3**
A great place to rest and rejuvenate	**8.6**	**8.7**	**6.4**	**7.5**	**7.1**
A great place for having fun	**8.3**	**8.4**	**6.7**	**7.7**	**7.0**
A unique place	**8.2**	**8.3**	**6.3**	**7.6**	**7.1**
Has popular attractions (man-made or natural)	**7.9**	**8.1**	**6.2**	**7.5**	**7.0**
Offers an authentic travel experience (not a tourist trap)	**7.7**	**7.7**	**6.9**	**7.6**	**7.1**
A place that is well known for its quality of travel experiences and services	**7.8**	**8.0**	**6.6**	**7.4**	**6.8**
Offers many possibilities to experience something new and different	**7.6**	**7.8**	**5.9**	**7.5**	**7.0**
Has great golf courses	**7.7**	**7.8**	**6.6**	**7.4**	**7.0**
A place that offers something for everyone	**7.6**	**7.7**	**6.7**	**7.5**	**6.9**
Offers appealing travel experiences year-round	**7.4**	**7.6**	**6.8**	**7.4**	**6.8**
Has great food and restaurants	**7.1**	**7.4**	**6.1**	**7.4**	**7.0**
Offers excellent value for the money	**6.9**	**7.1**	**6.1**	**7.3**	**6.9**
Great for arts & culture (museums, galleries, theatre, etc)	**6.1**	**6.3**	**6.4**	**7.3**	**6.7**
A great place to experience diverse cultures and ways of life	**5.8**	**6.1**	**6.6**	**7.4**	**6.9**

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Relatively Low

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Relatively High **Relatively Low**

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Perceptions Of Explorers’ Edge — Best And Worst Scores

Average rating on 10-point scale among recent visitors (past 2 years)

Highest

Has impressive scenery and landscapes	**8.4**	**(+1.2)**
A great place for enjoying outdoor activities	**8.3**	**(+1.0)**
A great place to enjoy boating	**8.3**	**(+1.1)**
A great place for having fun	**8.1**	**(+1.1)**
A place that can create lasting memories	**8.1**	**(+1.1)**
A great place to rest and rejuvenate	**8.0**	**(+1.0)**
A place where I would feel safe and comfortable	**8.0**	**(+0.9)**

Lowest

Interesting cities and towns that are worth seeing	**7.4**	**(+0.6)**
Easy destination to get to	**7.4**	**(+0.8)**
Interesting festivals and fairs	**7.4**	**(+0.8)**
Great food and restaurants	**7.4**	**(+0.5)**
Offers appealing travel experiences year-round	**7.4**	**(+0.7)**
Suits personal lifestyle and travel needs	**7.4**	**(+0.7)**
Easy to get around from place to place once you are there	**7.3**	**(+0.6)**
Excellent value for the money	**7.1**	**(+0.4)**
Great for arts & culture	**6.9**	**(+0.4)**
A great place to experience diverse cultures and ways of life	**6.7**	**(±0.0)**

(   ) Difference vs. non-visitors who are familiar

“Table Stakes” And Drivers Of Engagement

Perceptions of Explorers’ Edge among past visitors who do/do not plan to return

Regardless of whether they intend to return, visitors agree that Explorers’ Edge can deliver on these expectations…

- **Offers an authentic travel experience**
- **Easy to get around from place to place once you are there**
- **Great place to experience diverse cultures / ways of life**
- **A place where I would feel safe and comfortable**
- **Great place for enjoying outdoor activities**
- **Impressive scenery and landscapes**

Loyalty

& Sustained Growth

However sustained visitation hinges on going beyond the “table stakes”. Repeat visitors are far more likely than non-repeaters to believe…

- **Great for a vacation/getaway**
- **A great place for having fun**
- **Excites my curiosity**
- **Interesting festivals and fairs**
- **A unique place**
- **Has popular attractions (man-made or natural)**
- **Great place to rest and rejuvenate**
- **Great place for a romantic holiday**
- **Fits my personal lifestyle and pleasure travel needs**

Note: Based on analysis of gaps between repeat visitors and non-repeat visitors.

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Implications

Growth Summary

Growth insights

- The GTA and the wider Ontario market are key to the vitality of tourism to the Region. There is room for further growth within these markets.
- The Nearby US is at a more formative stage of development and will require long-term effort and investment to develop.
- The Quebec market is not particularly open or attuned to the Region. While some interest exists, it would likely be difficult to convert.

Precise plans for growth

- The GTA and Ontario should remain the primary targets for travellers to the Region. RTO12 investments should be primarily directed here for the foreseeable future.
- This means attracting those who already have some familiarity with the core offer. Therefore...
  - Stimulate visitation by placing emphasis on what is new, different and unique.
  - Communicate ***& package*** product diversity to encourage new thinking about the Region and broader exploration of the offer.
  - Use consumer segments to target communications and packaging.
- For now, use a partnering approach in the US (with the OTMPC, etc). Independent investment of limited resource will not be fruitful.
- Focus should not be placed on Quebec.

Growth Summary

Growth insights

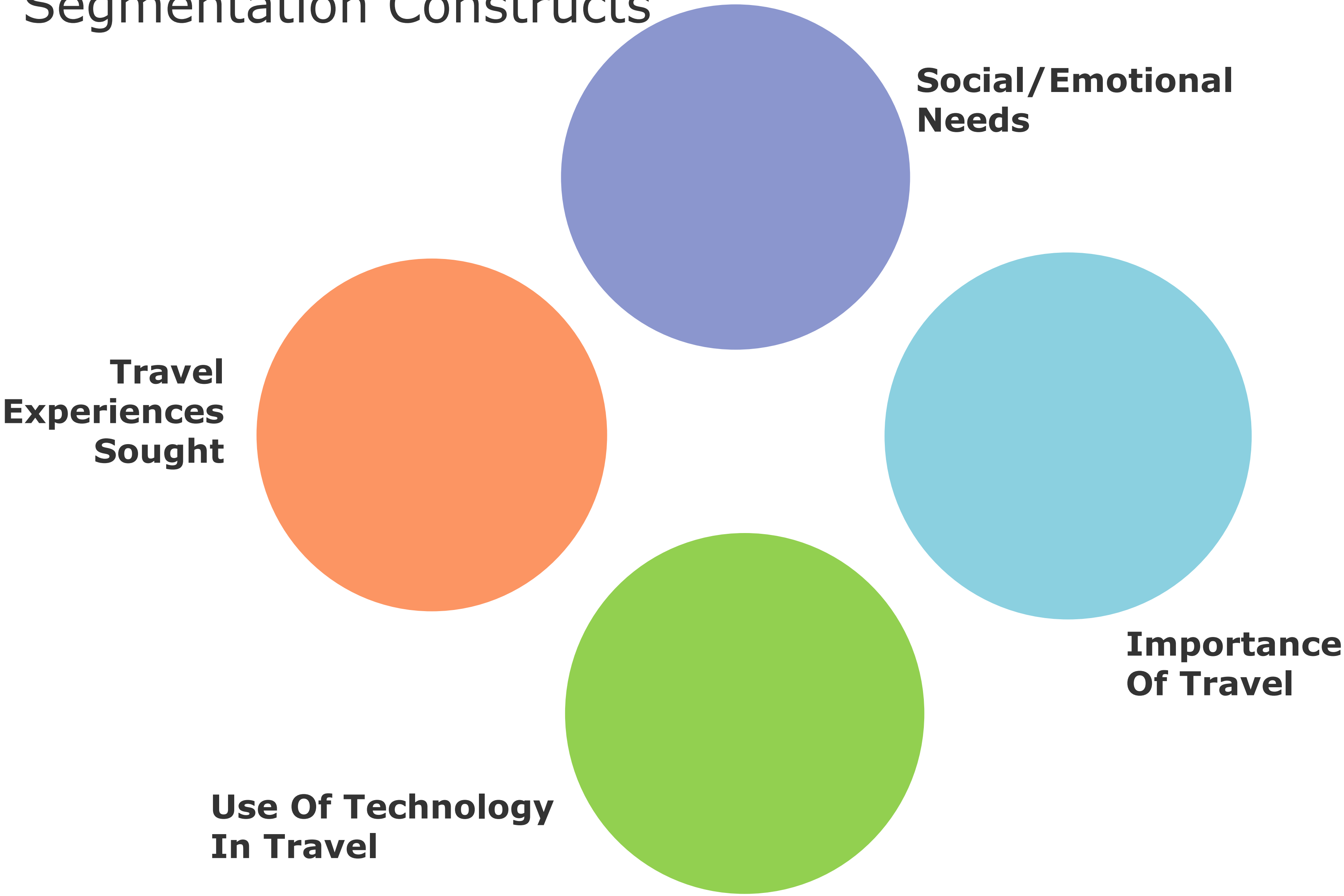
- The Region is highly rated for outdoor experiences, particularly those aligned with water-based activities in the context of rest and relaxation.
- It also has a reputation for uniqueness and authenticity that can be further leveraged.
- But it is not well recognized for the many strong assets it has beyond the outdoors:
  - Arts and culture;
  - Culinary;
  - Festivals and fairs.
- Cultural diversity and year-round opportunities are not fully appreciated.
- Exciting curiosity and establishing personal relevance are key to stimulating committed interest.

Precise plans for growth

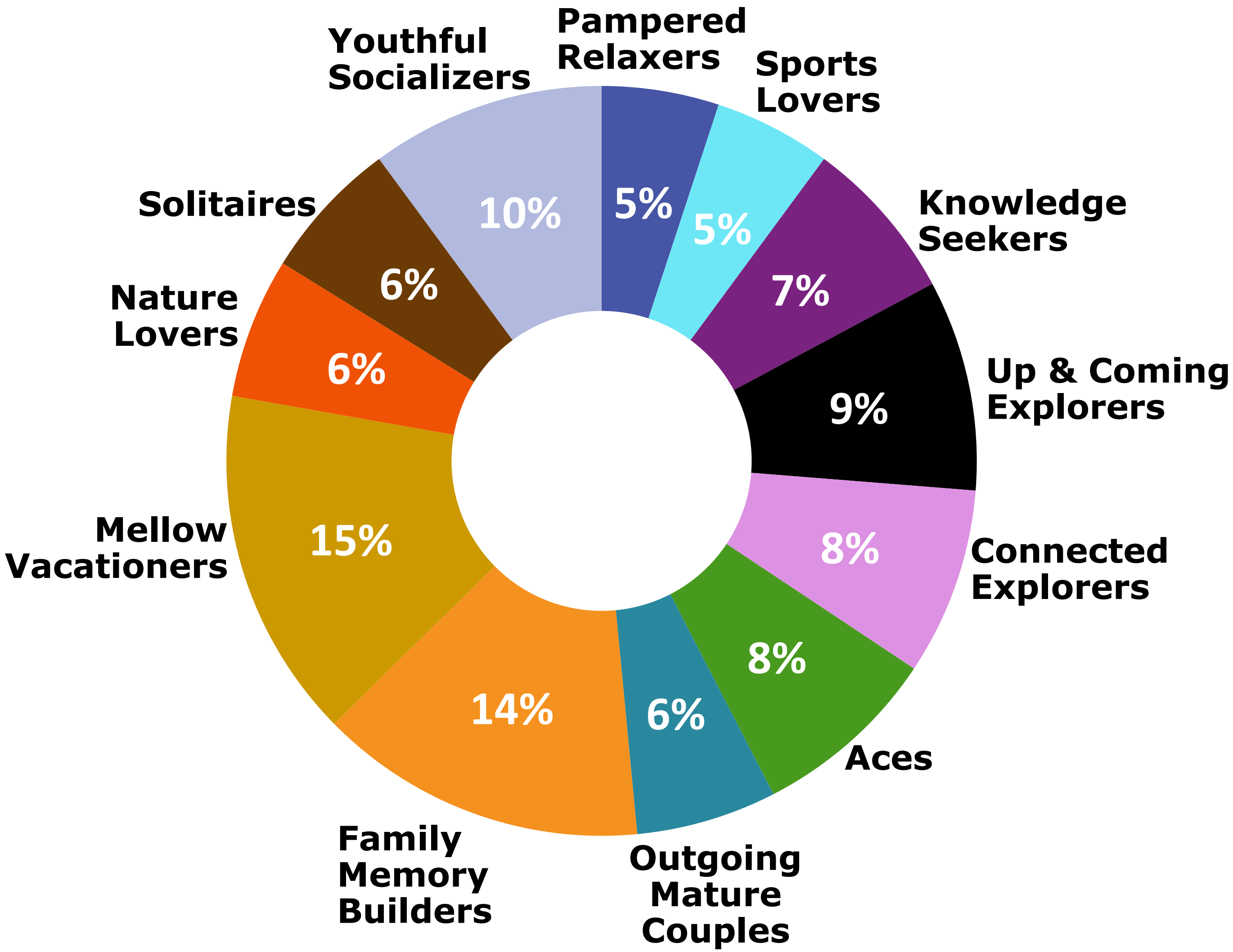
- Emotively, rest and relaxation should remain central to the offer.
- And, the outdoors and water should be core to the experience.
- However, to stimulate new growth, highlight complementary experiences such as festivals, fairs, arts and culinary. This will…
  - Elevate spending among loyalists.
  - Stimulate curiosity among potentials.
  - Support off-peak visitation.
- Highlight unique and specific aspects of the outdoors to achieve the same end:
  - Trails, touring, winter activities.
- Connect with consumers at an emotive level in marketing communications – move beyond just the products offered.
- Use digital channels to personalize messaging.

Overlaying The Traveller Segmentation

Segmentation Constructs



12 Unique Segments Were Identified



Introducing The 12 Travel Segments

Pampered Relaxers

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

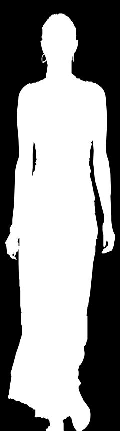
For this segment, vacations are a time to relax and re-energize often through high-end sophisticated activities.

Sports Lovers

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

Knowledge Seekers

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



Up & Coming Explorers

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

Connected Explorers

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

Aces

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

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Introducing The 12 Travel Segments (cont'd)

Outgoing Mature Couples

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

Family Memory Builders

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

Mellow Vacationers

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

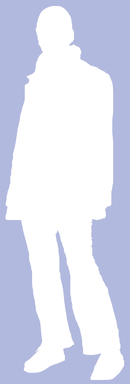
Nature Lovers

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.

Solitaires

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



Youth Socializers

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

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

Using Segmentation To Broaden Offer

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ONTARIO
Yours to discover

Demographic

Demographic Classification

	Singles	Couples	Families
Older			
Mid			
Younger			

Demographic Classification

	Singles	Couples	Families
Older			
Mid	**Solitaires**	**Pampered Relaxers**	**Nature Lovers** **Family Memory Builders**
Younger	**Youthful Socializers**		**Up & Coming Explorers**

Demographic Classification

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

Demographic Classification

	Singles	Couples	Families
Older		**Outgoing Mature** **Know. Seekers** **Mellow Vacationers** **Aces**	
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Younger	**Youthful Socializers**	**Connected Explorers**	**Up & Coming Explorers**

Demographic Classification

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

Incidence Of Segment Within Source Market

Percent of travellers residing in… falling into each segment				
	Ontario	Quebec	Nearby US	Other US
	%	%	%	%
Pampered Relaxers	11	17	4	3
Sports Lovers	9	9	5	4
Knowledge Seekers	8	10	7	7
Up & Coming Explorers	7	3	12	9
Connected Explorers	7	5	7	9
Aces	6	2	11	8
Outgoing Mature Couples	9	14	4	5
Family Memory Builders	9	7	13	15
Mellow Vacationers	8	7	16	17
Nature Lovers	11	13	5	6
Solitaires	5	6	5	6
Youthful Socializers	9	7	10	10

Well Above Average
Above Average
Below Average
Well Below Average

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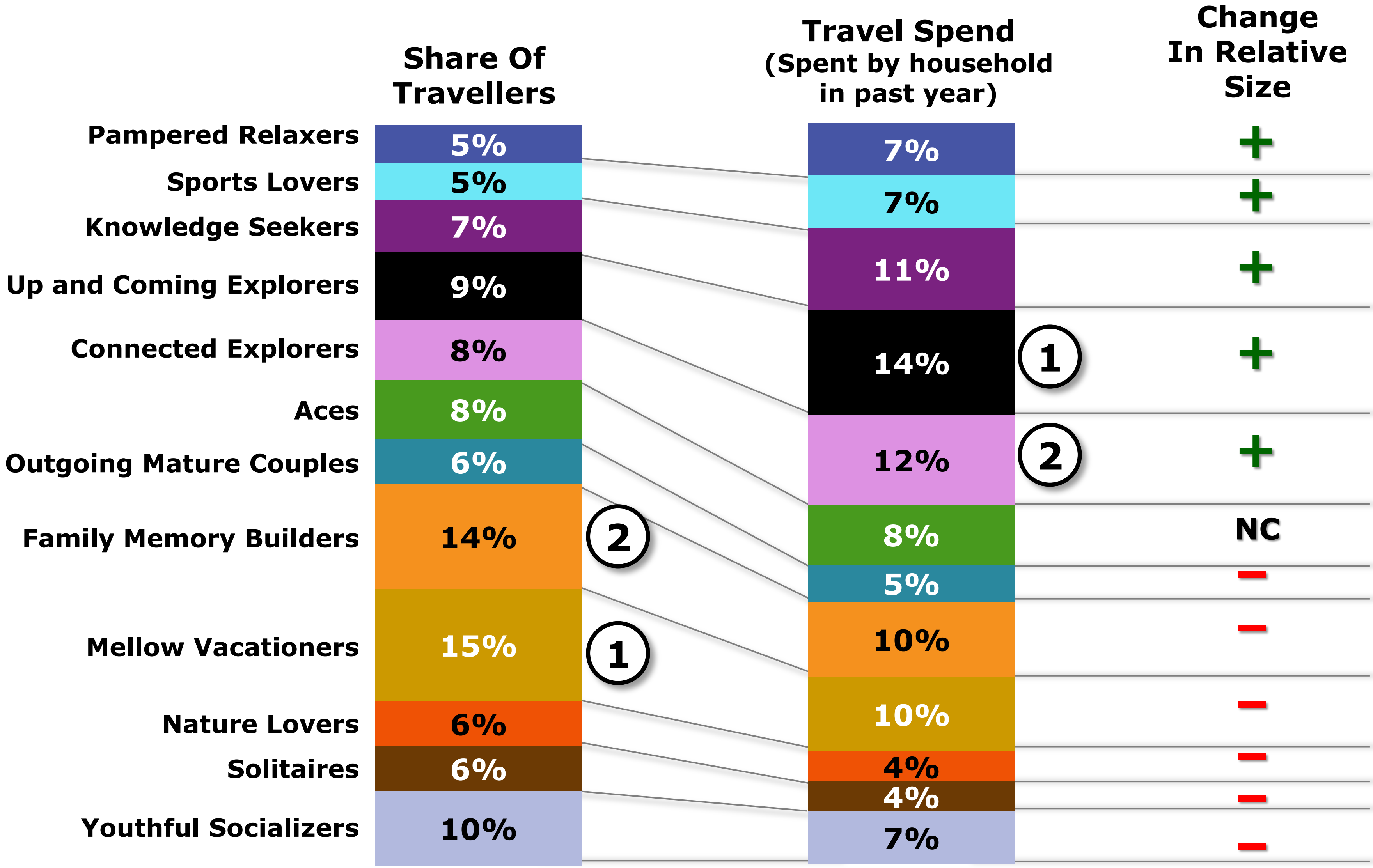
Segment Value

"Dollars vs. Bodies"



Other Value Metrics

	Average Annual House-hold Income	Average Annual House-hold Travel Budget	Average Number Of Trips In Past 12 Months	Average Trip Length (In days)	Average Party Size Per Trip
Pampered Relaxers	$105,554	$4,232	2.8	6.4	3.0
Sports Lovers	$103,533	$3,868	3.3	5.4	3.2
Knowledge Seekers	$102,480	$4,713	3.1	8.0	2.7
Up & Coming Explorers	$88,361	$4,637	3.5	4.6	2.8
Connected Explorers	$93,080	$4,267	3.6	5.8	2.8
Aces	$77,205	$3,093	2.8	4.6	2.9
Outgoing Mature Couples	$68,152	$2,562	2.6	6.8	3.6
Family Memory Builders	$82,159	$2,213	2.3	4.9	4.1
Mellow Vacationers	$80,141	$2,061	2.2	5.4	2.5
Nature Lovers	$70,547	$2,172	3.1	5.4	3.7
Solitaires	$62,507	$1,990	2.5	6.0	1.6
Youthful Socializers	$66,383	$2,029	2.4	4.7	2.9

Above Average **Below Average**

TNS

Experiences Sought

Travel Experiences Sought By Segments

	Pam-pered Relaxers	Sports Lovers	Know-ledge Seekers	Up & Coming Explorers	Connected Explorers	Aces	Outgoing Mature Couples	Family Memory Builders	Mellow Vaca-tioners	Nature Lovers	Soli-taires	Youthful Social-izers
	%	%	%	%	%	%	%	%	%	%	%	%
Nature Lover	13	21	25	32	30	17	30	32	30	49	29	21
Knowledge Seeker	6	24	54	17	23	17	21	18	23	16	27	16
Adventure Seeker	7	20	15	35	23	17	15	17	8	25	14	31
Culture Seeker	12	16	52	21	34	11	7	13	18	9	25	30
Love Being Pampered	49	7	3	14	14	23	7	13	10	4	10	10
Love Socializing	16	15	9	7	13	15	31	4	9	7	12	20

Well Above Average
Above Average
Below Average
Well Below Average

Average Number of Activities = 10.2 Versus 6.1 among Total Travellers

TNS

Prioritizing the Segments

Suggested Criteria For Prioritization

1. **Setting Priorities to Support the Current Business.** Identifying those segments that contribute most strongly to your Region's tourism industry today.

   - Which segments is the region attracting at above-average numbers – delivering tourists (as opposed to dollars)?
   - Which segments are demonstrating a behavioural preference for the Region (contributing higher share among visitors to the Region than the segment represents among total travellers)?
   - Which segments are spending in the region at above their average rate?

2. **Identifying the Growth Opportunity.** Identifying segments offering the most potential to grow tourism to the Region.

   - Alignment of the segment's travel interests and activities with the Region's existing and potential future product offering.
   - Level of interest in the region (will the segment be more or less difficult to attract?).
   - Dollars available for tourism – what is the segment's share of total travel spending?
   - Single trip value – how much is typically spent per trip within the segment?

Supporting The Current Business: Current Visitation Levels

People Volume	Rate Of Attraction	Dollar Volume
Segments with above average share of travellers to Explorers' Edge	Segments with elevated representation among Explorers' Edge travellers relative to total travellers	Segments with above average share of Spending in Explorers' Edge
▪ Up & Coming Explorers ▪ Nature Lovers ▪ Sports Lovers ▪ Pampered Relaxers	▪ Up & Coming Explorers ▪ Nature Lovers ▪ Sports Lovers ▪ Pampered Relaxers	▪ Up & Coming Explorers ▪ Pampered Relaxers ▪ Nature Lovers ▪ Connected Explorers

Looking Forward: Supporting Tourism Growth

TNS

ONTARIO
Yours to discover

Activities Undertaken On Trip – Ontario Trips vs. Total Trips

Pampered Relaxers

On Ontario Trips	On Any Trips
Culinary (vineyards and fine dining)	Beach
Shopping	Shopping
Sightseeing (Net)	Fine dining
Touring (Net)	Sightseeing
Beach	Resort
Spa	Touring (Net)
Casino/gambling	

Sports Lovers

On Ontario Trips	On Any Trips
Shopping	Shopping
Fine dining	Fine dining
Sporting events (spectator)	Sporting events (spectator)
Sightseeing (Net)	Beach
Beach	Sightseeing
	Golf

Knowledge Seekers

On Ontario Trips	On Any Trips
Sightseeing (Net)	Sightseeing (Net)
Visiting nature sights (Net)	Visiting nature sights (Net)
Fine dining	Touring (Net)
Touring (Net)	Shopping
Shopping	
Festivals/ events (Net)	

Up and Coming Explorers

On Ontario Trips	On Any Trips
Amusement/ theme park (Net)	Amusement/ theme park (Net)
Playing sports (Net)	Sightseeing (Net)
Outdoor activities (Net)	Nature sightseeing (Net)
Sightseeing (Net)	Outdoor activities (Net)
Nature sightseeing (Net)	Shopping
Shopping	Culinary
Touring (Net)	Beach

Connected Explorers

On Ontario Trips	On Any Trips
Sightseeing (Net)	Sightseeing (Net)
Culinary (Net)	Shopping
Nature sightseeing (Net)	Nature sightseeing (Net)
Shopping	Culinary
Outdoor activities (Net)	Touring (Net)
Festivals/ events (Net)	Beach

Aces

On Ontario Trips	On Any Trips
Casinos/ gambling	Casinos/ gambling
Shopping	Shopping
Fine dining	Fine dining
Sightseeing (Net)	Sightseeing (Net)
Theatre/ Concerts/ dance shows	Beach

Aligns with Region Offer

Activities Undertaken On Trip – Ontario Trips vs. Total Trips

Outgoing Mature Couples

On Ontario Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Fishing
- Touring (Net)
- Beach

On Any Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Beach
- Touring (Net)

Family Memory Builders

On Ontario Trips

- Sightseeing (Net)
- Shopping
- Nature sightseeing (Net)
- Culinary
- Amusement/ theme park (Net)

On Any Trips

- Shopping
- Sightseeing (Net)
- Amusement/ theme park (Net)
- Beach
- Nature Sightseeing (Net)
- Culinary
- Touring (Net)

Mellow Vacationers

On Ontario Trips

- Fine Dining
- Sightseeing
- Touring (Net)
- Fishing

On Any Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Beach
- Museums/ Galleries

Nature Lovers

On Ontario Trips

- Camping
- Outdoor activities (Net)
- Nature sightseeing (Net)
- Beach
- Sightseeing (Net)
- Touring (Net)
- Shopping

On Any Trips

- Camping
- Outdoor activities (Net)
- Sightseeing (Net)
- Nature sightseeing (Net)
- Beach

Solitaires

On Ontario Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Museum/ galleries
- Beach
- Theatre/ concerts/ dance shows

On Any Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Beach
- Museum/ galleries

Youthful Socializers

On Ontario Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Nightclubs/ entertainment
- Theatre/ concerts/ dance shows

On Any Trips

- Shopping
- Fine dining
- Sightseeing (Net)
- Beach
- Nightclubs/ entertainment
- Theatre/ concerts/ dance shows

Aligns with Region Offer

Future Interest In Visiting The Region

Above Average Interest In Visiting Explorers' Edge In Next Two Years

Average interest levels

GTA	OTHER ONTARIO	QUEBEC	NEARBY US	OTHER US
47%	39%	12%	10%	10%
Nature Lovers (68%)	Nature Lovers (54%)	Up and Coming Explorers (27%)	Up and Coming Explorers (33%)	Up and Coming Explorers (39%)
Connected Explorers (53%)	Up and Coming Explorers (47%)	Connected Explorers (17%)	Nature Lovers (19%)	Nature Lovers (17%)
	Connected Explorers (45%)	Youthful Socializers (15%)	Connected Explorers (17%)	Connected Explorers (17%)
			Knowledge Seekers (14%)	Youthful Socializers (14%)

Determining High Value Segments

	Share Of Travel Dollars (Spent by household in past year)	Avg. Spend At Any Destination	Avg. Spend On Ontario Trips	Above Avg. In RTO12
Pampered Relaxers	7%	$2,952	$1,175	✓
Sports Lovers	7%	$1,659	$1,116	
Knowledge Seekers	11%	$3,024	$1,160	
Up and Coming Explorers	14%	$2,266	$2,028	
Connected Explorers	12%	$2,051	$1,702	
Aces	8%	$1,625	$1,101	
Outgoing Mature Couples	5%	$1,643	$1,314	
Family Memory Builders	10%	$1,774	$1,074	
Mellow Vacationers	10%	$1,073	$766	
Nature Lovers	4%	$1,149	$843	
Solitaires	4%	$1,168	$1,103	
Youthful Socializers	7%	$1,298	$731	

TNS

Spend $ in Green = Above Average
Spend $ in Red = Below Average

Current And Future Segment Priorities

Current

Primary

- ✓ **Nature Lovers**
- ✓ **Pampered Relaxers**
- ✓ **Up and Coming Explorers**
- ✓ **Sports Lovers**

Future

Primary

- ✓ **Connected Explorers**
- ✓ **Nature Lovers**
- ✓ **Up and Coming Explorers**
- ✓ **Pampered Relaxers**

Reaching Target Segments

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%

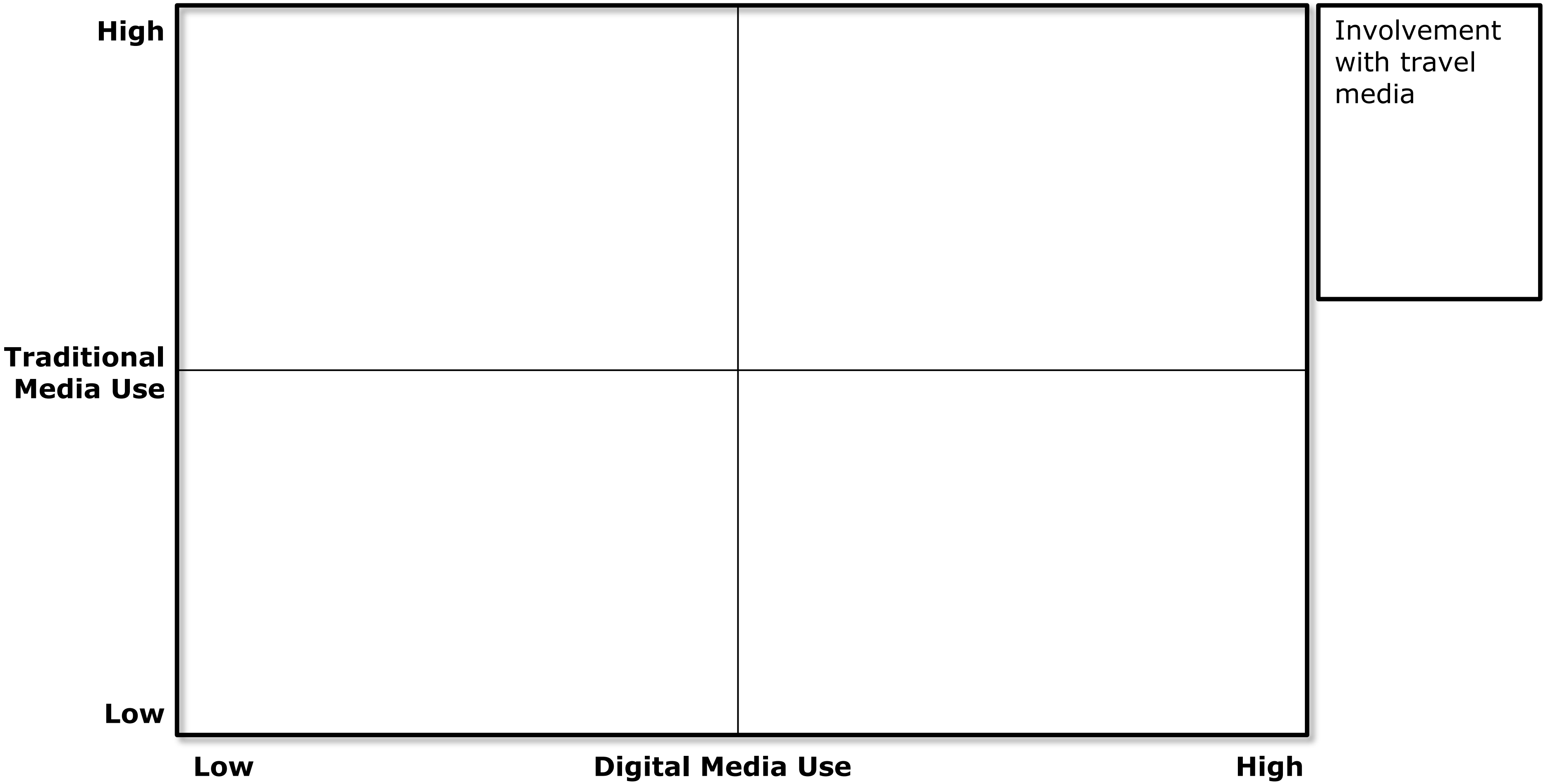
Where To Find Up And Coming Explorers

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**606,106**	**4.5%**
Ontario	501,347	5.6%
GTA	404,071	10.2%
Other Ontario	97,276	1.9%
Quebec	97,276	2.5%
Montreal	82,311	2.9%
Other Quebec	14,966	1.6%
Manitoba	7,483	1.4%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	329,243	8.1%
Boston	306,794	6.2%
Chicago	486,381	7.6%
New York City	1,010,177	13.6%
Washington DC	434,002	9.9%

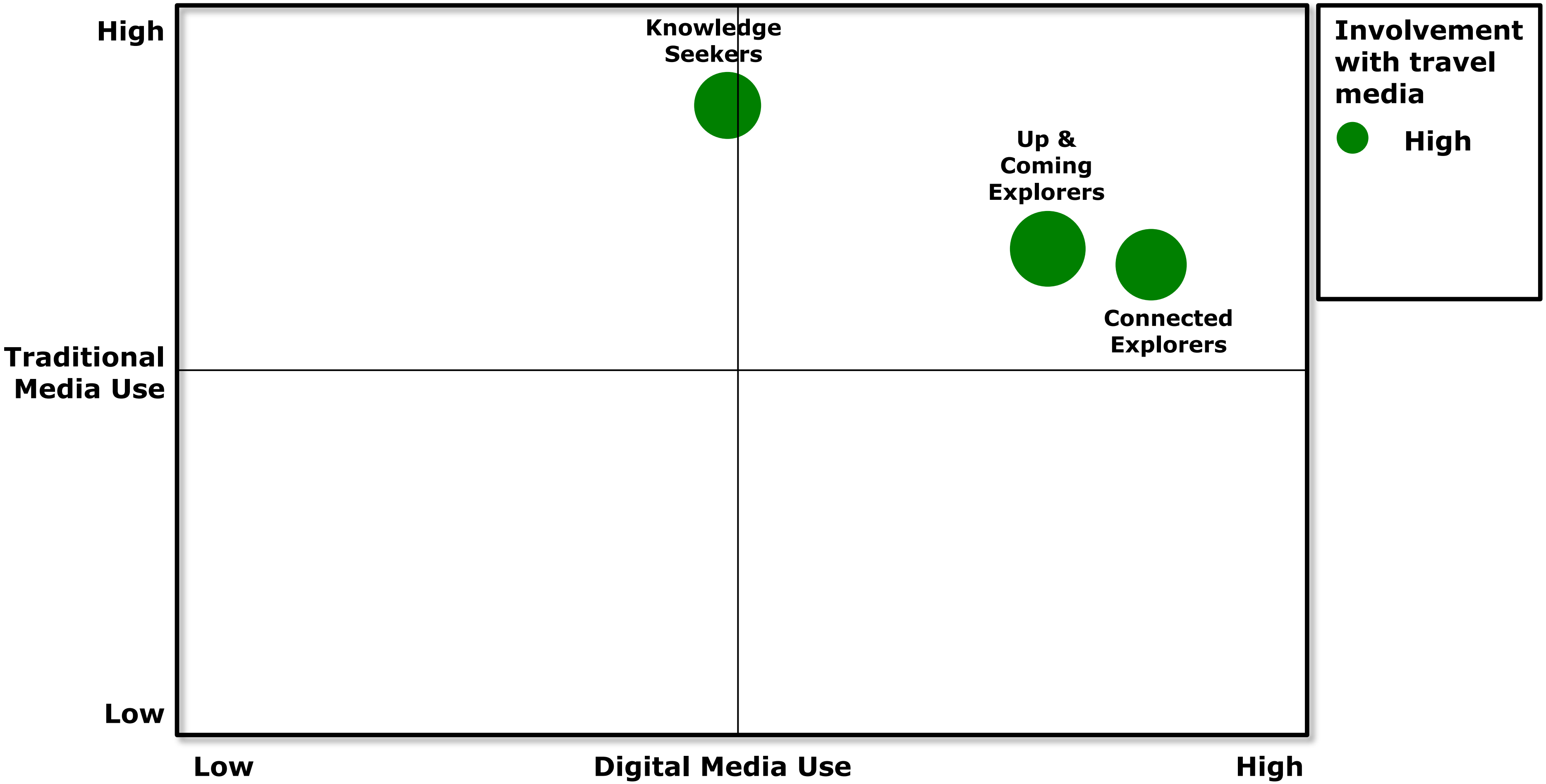
Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**6,876,684**	**6.8%**
States:		
Connecticut	359,174	13.0%
Delaware	44,897	6.5%
Illinois	583,658	6.0%
Indiana	82,311	1.7%
Maryland	366,657	13.7%
Massachusetts	314,277	5.5%
Michigan	351,691	4.7%
Minnesota	119,725	2.9%
New Jersey	568,692	9.9%
New York	1,631,248	12.0%
Ohio	493,864	5.4%
Pennsylvania	501,347	4.5%
Virginia	471,416	11.4%
Wisconsin	231,966	5.5%
Kentucky	157,139	5.2%
New Hampshire	52,380	3.3%
North Carolina	434,002	6.0%
Rhode Island	22,448	2.7%
Vermont	14,966	3.0%
West Virginia	29,931	2.2%

How To Reach Target Segments – Media Consumption Patterns



Note: Size of bubble corresponds to size of segment

How To Reach Target Segments – Media Consumption Patterns



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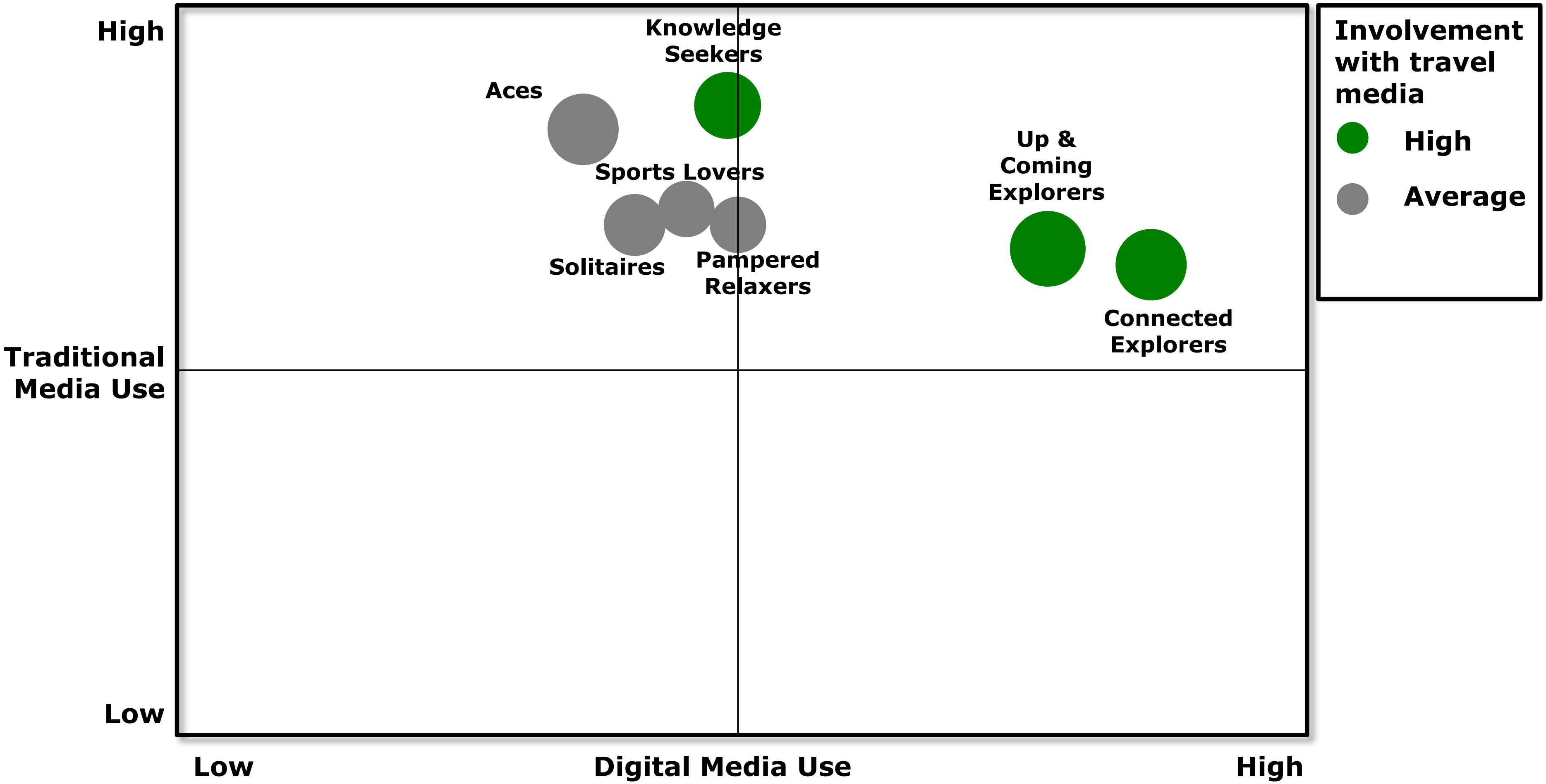

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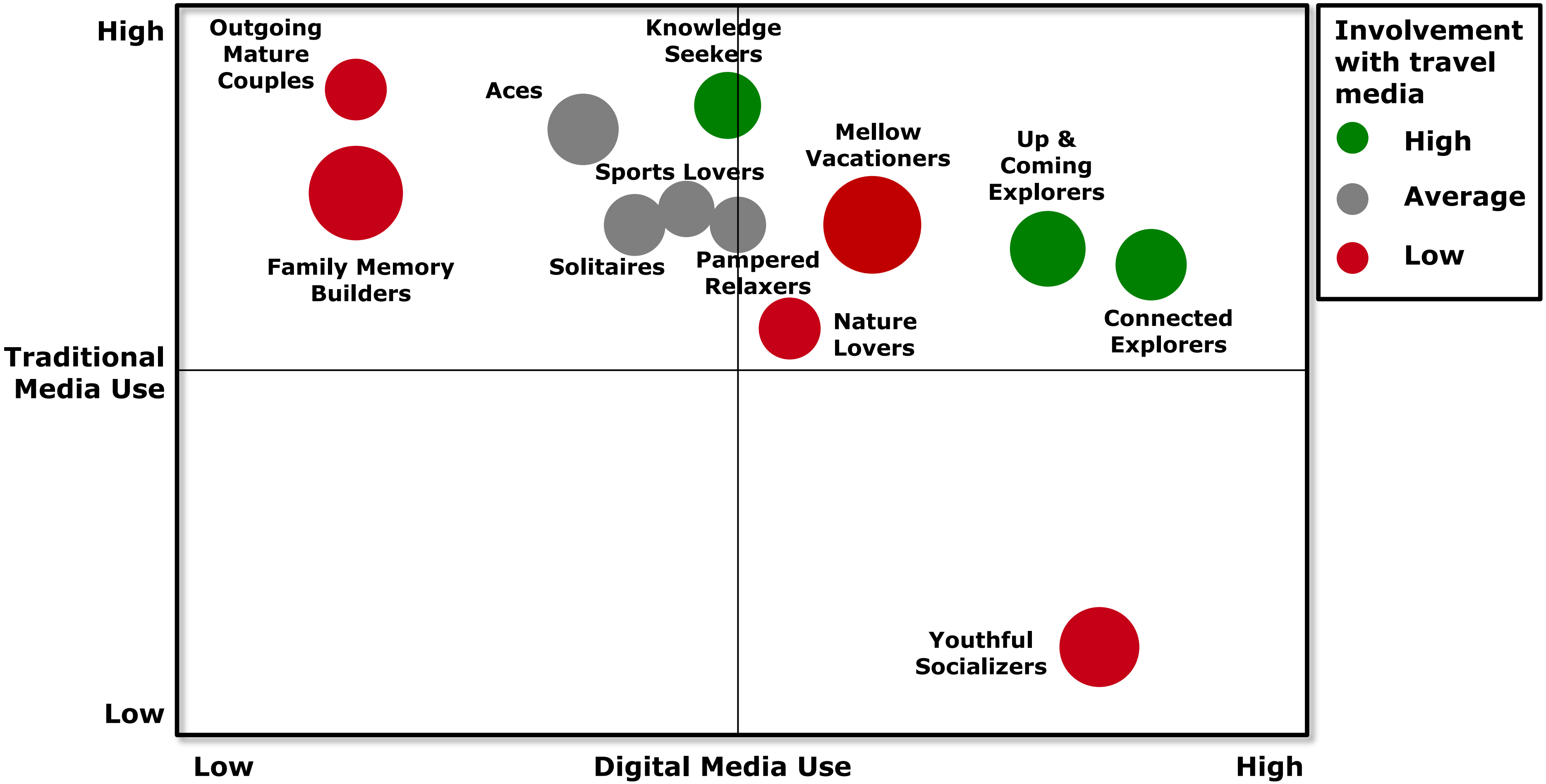
How To Reach Target Segments – Media Consumption Patterns



Note: Size of bubble corresponds to size of segment

How To Reach Connected Explorers

	Connected Explorers	Difference vs. Total Travellers
% reading newspaper	**78%**	**+12**
- Daily print	**51%**	**-7**
- Daily on computer	**55%**	**+22**
- Daily on mobile	**25%**	**+16**
% reading travel section of daily newspaper	**73%**	**+19**
% reading magazine	**78%**	**+13**
- Entertainment/music	**44%**	**+13**
- Food/cooking	**41%**	**+15**
- Travel	**33%**	**+20**
- Home/garden	**32%**	**+7**
- Health/fitness/living	**30%**	**+8**
Avg. # hrs. watch TV (reg)	**13.8**	**-0.3**
Avg. # hrs. watch PVR	**4.4**	**+1.0**
Ave. # hrs. watch TV online	**7.3**	**+2.1**
- Movies	**59%**	**+9**
- Dramas	**55%**	**+6**
- News	**56%**	**+11**
- Travel	**49%**	**+28**
Avg. # hrs. listen to radio	**7.2**	**-0.7**
- Morning (weekday)	**83%**	**+8**
- News/talk	**45%**	**+10**
- Top 40	**41%**	**+11**

	Connected Explorers	Difference vs. Total Travellers
% using Internet	**98%**	**+9**
- Search engine	**90%**	**+13**
- Weather	**72%**	**+19**
- Shopping	**73%**	**+23**
- Entertainment	**67%**	**+21**
- Travel	**67%**	**+34**
Avg. # hrs. spent browsing per week	**17.3**	**+4.6**
% using social networks	**93%**	**+15**
- Facebook	**87%**	**+19**
- Twitter	**26%**	**+12**
Avg. # hrs. spent on social networks	**6.5**	**+1.9**
% using smartphone/tablet when travelling	**79%**	**+33**
- Look up information	**98%**	**+21**
- Check review sites	**74%**	**+49**
- make reservations	**62%**	**+38**
- Use travel apps	**51%**	**+32**

Above Average

TNS

Implications

Growth Summary

Growth insights

- As one of Ontario's premier outdoor destinations, RTO 12 has the ability to attract a broad spectrum of travellers.
- While Nature Lovers are at the core of attraction, their spend levels tend to be muted.
- The appeal of the outdoors and nature cuts across multiple segments exhibiting higher spend levels.
- In addition, Pampered Relaxers and Sports Lovers represent an middle-age cohort with premium spend levels and some affinity to the Region beyond nature *per se*.

Precise plans for growth

- Place the unique natural environment at the core of the offer. But surround it with complementary activities that extend the experience and further differentiate the Region.
- Attract high-end spenders (epitomized by Pampered Relaxers) by promoting and/or further investing in premium accommodation, services and activities - shopping, resorts, spas, access to "the outdoors" in comfort.
- Impress Nature Lovers with the wide range of Park experiences in the Region that are easily accessed within reasonable budgets, yet provide exposure to an incredible diversity of environments.

Growth Summary

Growth insights

- Connected Explorers are under-represented among current visitors, but show strong potential to drive future growth.
- Up and Coming Explorers exhibit strong interest in the Region.
- Both Explorer segments represent a more youthful traveller with relatively high spend levels.
- The outdoors resonates with these groups, but so too does a host of other experiences.

Precise plans for growth

- The Explorer segments provide a target for a youth strategy that emphasizes:
  - The Region's iconic outdoor attractions;
  - The active outdoors;
  - A sense of adventure that can be exercised without foregoing rest and relaxation.
- For Connected Explorers it will also be important to emphasize the range of diverse experiences to enjoy on a single trip, extending beyond nature.
  - Emphasize the arts and culture activities available, including culinary, music and festivals.
  - Showcase a truly unique natural **and social** setting that offers experiences during the day and in the evening and across all seasons.

Growth Summary

Growth insights

- Digital and mobile connectivity plays a key role in reaching the Explorer groups as does vertical travel media.
- Up and Coming Explorers provide some targeting cues for reaching interested ethnic and immigrant groups.

Precise plans for growth

- Use the Explorer segments to deepen the digital marketing strategy – online itineraries, planning tools, supports for mobile real-time decision-making.
- These groups should represent the target if vertical travel media are used.
- Develop marketing materials specifically aimed at the youthful ethnic traveller.
  - This is relevant to Up and Coming Explorers and to the GTA target market
  - The materials must be culturally sensitive beyond just language, and facilitate engagement with activities that may be new to this group (education, guided activities, etc.).

Growth Summary

Growth insights

- Connected Explorers are under-represented within current visitors but show strong potential to drive future growth.

Precise plans for growth

- Drive growth within this segment through demonstrating the breadth of the offer. Emphasize the number of activities and experiences available within a single trip. Combine day and night activities in communications to emphasize the fullness of the experience.
- Emphasize arts and culture activities available, including culinary, music and festivals to promote the unique RTO 12 experience.
- Where possible, use social media and digital to enhance the travelling experience; before, during and after the trip.

Questions and Discussion

How To Reach Pampered Relaxers

Detail Media Consumption

	Pampered Relaxers	Difference vs. Total Travellers
% reading newspaper	37%	-29
- Daily print	58%	±0
- Daily on computer	25%	-8
- Daily on mobile	10%	+1
% reading travel section of daily newspaper	54%	+3
% reading magazine	61%	-4
- Entertainment/music	35%	+4
- Food/cooking	29%	+3
- Fashion/beauty	26%	+9
- Health/fitness/living	23%	+1
- Travel	16%	+3
Avg. # hrs. watch TV (reg)	13.3	-0.8
Avg. # hrs. watch PVR	4.1	+0.7
Ave. # hrs. watch TV online	4.2	-1
- Movies	54%	+4
- Dramas	54%	+5
- News	48%	+3
- Reality shows	46%	+11
Avg. # hrs. listen to radio	8.2	+0.3
- Top 40	37%	+7
- News/talk	29%	-6
- Oldies	29%	-1

	Pampered Relaxers	Difference vs. Total Travellers
% using Internet	90%	+1
- Search engine	80%	+3
- Weather	55%	+2
- Shopping	52%	+2
- Travel	48%	+15
- Entertainment	46%	±0
Avg. # hrs. spent browsing per week	10.7	-1.4
% using social networks	74%	-4
- Facebook	61%	-7
- Twitter	6%	-8
Avg. # hrs. spent on social networks	3.6	-1
% using smartphone/tablet when travelling	43%	-3
- Look up information	70%	-7
- Check review sites	11%	-14
- make reservations	15%	-9
- Use travel apps	14%	-5

How To Reach Sports Lovers

Detail Media Consumption

	Sports Lovers	Difference vs. Total Travellers
% reading newspaper	**21%**	**-45**
- Daily print	**63%**	**+5**
- Daily on computer	**33%**	**0**
- Daily on mobile	**10%**	**+1**
% reading travel section of daily newspaper	**53%**	**-1**
% reading magazine	**69%**	**+4**
- Professional Sports	**30%**	**+19**
- Health/fitness/living	**22%**	**0**
- General interest	**21%**	**+1**
- Business/finance/investment	**18%**	**+3**
- Outdoor activities	**15%**	**+8**
Avg. # hrs. watch TV (reg)	**14.3**	**+0.2**
Avg. # hrs. watch PVR	**4.0**	**+0.6**
Ave. # hrs. watch TV online	**4.1**	**-1.1**
- Sports	**67%**	**+33**
- News	**52%**	**+7**
- Movies	**49%**	**-1**
- Situation comedies	**40%**	**+5**
Avg. # hrs. listen to radio	**9.2**	**+1.3**
- News/talk	**40%**	**+5**
- Oldies	**36%**	**+6**
- Sports	**30%**	**+17**

	Sports Lovers	Difference vs. Total Travellers
% using Internet	**90%**	**+1**
- Search engine	**80%**	**+3**
- Weather	**62%**	**+9**
- Sports	**55%**	**+27**
- Network news	**34%**	**+3**
- Newspapers	**34%**	**+5**
Avg. # hrs. spent browsing per week	**10.0**	**-2.1**
% using social networks	**70%**	**-8**
- Facebook	**57%**	**-11**
- Twitter	**12%**	**-2**
Avg. # hrs. spent on social networks	**3.0**	**-1.6**
% using smartphone/tablet when travelling	**49%**	**+3**
- Look up information	**79%**	**+2**
- Check review sites	**20%**	**-5**
- make reservations	**25%**	**+1**
- Use travel apps	**13%**	**-6**

How To Reach Knowledge Seekers
Detail Media Consumption

	Knowledge Seekers	Difference vs. Total Travellers
% reading newspaper	**77%**	**+11**
- Daily print	**68%**	**+10**
- Daily on computer	**30%**	**-2**
- Daily on mobile	**6%**	**-3**
% reading travel section of daily newspaper	**34%**	**+14**
% reading magazine	**74%**	**+9**
- News	**32%**	**+14**
- Travel	**27%**	**+14**
- Science/geography	**21%**	**+7**
- Business/finance/investment	**20%**	**+5**
- City (Toronto Life, etc.)	**12%**	**+5**
Avg. # hrs. watch TV (reg)	**13.9**	**-0.1**
Avg. # hrs. watch PVR	**3.6**	**+0.2**
Ave. # hrs. watch TV online	**4.7**	**-0.5**
- News	**56%**	**+11**
- Dramas	**50%**	**+1**
- History	**41%**	**+6**
- Travel	**31%**	**+10**
Avg. # hrs. listen to radio	**7.9**	**±0**
- News/talk	**49%**	**+14**
- Top 40	**21%**	**-9**
- Classical	**19%**	**+7**

	Knowledge Seekers	Difference vs. Total Travellers
% using Internet	**90%**	**+1**
- Search engine	**81%**	**+4**
- Weather	**59%**	**+6**
- Travel	**52%**	**+19**
- Newspapers	**35%**	**+6**
- Entertainment	**34%**	**-12**
Avg. # hrs. spent browsing per week	**11.7**	**-1.0**
% using social networks	**64**	**-14**
- Facebook	**55**	**-13**
- Twitter	**7**	**-7**
Avg. # hrs. spent on social networks	**2.4**	**-2.2**
% using smartphone/tablet when travelling	**29**	**-11**
- Look up information	**75**	**-2**
- Check review sites	**18**	**-7**
- Make reservations	**24**	**±0**
- Use travel apps	**13**	**-6**

How To Reach Up And Coming Explorers

Detail Media Consumption

	Up and Coming Explorers	Difference vs. Total Travellers
% reading newspaper	**51%**	**-15**
- Daily print	**64%**	**+6**
- Daily on computer	**37%**	**+4**
- Daily on mobile	**15%**	**+6**
% reading travel section of daily newspaper	**83%**	**+29**
% reading magazine	**50%**	**-15**
- Computers/electronics/tech	**30%**	**+18**
- Fashion/beauty	**29%**	**+12**
- Business/finance/investment	**29%**	**+14**
- Health/fitness/living	**28%**	**+6**
- Automobile/cycle	**22%**	**+11**
Avg. # hrs. watch TV (reg)	**10.6**	**-3.5**
Avg. # hrs. watch PVR	**3.5**	**+0.1**
Ave. # hrs. watch TV online	**7.4**	**+2.2**
- Movies	**44%**	**-6**
- Cooking shows	**41%**	**+1**
- Biography	**20%**	**+3**
- Shopping channels	**12%**	**+7**
Avg. # hrs. listen to radio	**5.3**	**-2.6**
- Classical	**25%**	**+13**
- Sports	**22%**	**+9**
- Jazz	**15%**	**+8**

	Up and Coming Explorers	Difference vs. Total Travellers
% using Internet	**89%**	**±0**
- Entertainment	**59%**	**+13**
- Search engine	**42%**	**-35**
- Games	**38%**	**+7**
- Health	**36%**	**±0**
- Weather	**26%**	**-27**
Avg. # hrs. spent browsing per week	**13.8**	**+1.7**
% using social networks	**90%**	**+12**
- Facebook	**80%**	**+12**
- Twitter	**33%**	**+19**
Avg. # hrs. spent on social networks	**5.9**	**+1.3**
% using smartphone/tablet when travelling	**67%**	**+21**
- Look up information	**73%**	**-4**
- Check review sites	**43%**	**+18**
- make reservations	**41%**	**+17**
- Use travel apps	**19%**	**±0**

How To Reach Connected Explorers

Detail Media Consumption

	Connected Explorers	Difference vs. Total Travellers
% reading newspaper	**78%**	**+12**
- Daily print	**51%**	**-7**
- Daily on computer	**55%**	**+22**
- Daily on mobile	**25%**	**+16**
% reading travel section of daily newspaper	**73%**	**+19**
% reading magazine	**78%**	**+13**
- Entertainment/music	**44%**	**+13**
- Food/cooking	**41%**	**+15**
- Travel	**33%**	**+20**
- Home/garden	**32%**	**+7**
- Health/fitness/living	**30%**	**+8**
Avg. # hrs. watch TV (reg)	**13.8**	**-0.3**
Avg. # hrs. watch PVR	**4.4**	**+1.0**
Ave. # hrs. watch TV online	**7.3**	**+2.1**
- Movies	**59%**	**+9**
- Dramas	**55%**	**+6**
- News	**56%**	**+11**
- Travel	**49%**	**+28**
Avg. # hrs. listen to radio	**7.2**	**-0.7**
- Morning (weekday)	**83%**	**+8**
- News/talk	**45%**	**+10**
- Top 40	**41%**	**+11**

	Connected Explorers	Difference vs. Total Travellers
% using Internet	**98%**	**+9**
- Search engine	**90%**	**+13**
- Weather	**72%**	**+19**
- Shopping	**73%**	**+23**
- Entertainment	**67%**	**+21**
- Travel	**67%**	**+34**
Avg. # hrs. spent browsing per week	**17.3**	**+4.6**
% using social networks	**93%**	**+15**
- Facebook	**87%**	**+19**
- Twitter	**26%**	**+12**
Avg. # hrs. spent on social networks	**6.5**	**+1.9**
% using smartphone/tablet when travelling	**79%**	**+33**
- Look up information	**98%**	**+21**
- Check review sites	**74%**	**+49**
- make reservations	**62%**	**+38**
- Use travel apps	**51%**	**+32**

TNS

How To Reach Aces

Detail Media Consumption

	Aces	Difference vs. Total Travellers
% reading newspaper	**69%**	**+3**
- Daily print	**65%**	**+7**
- Daily on computer	**26%**	**-7**
- Daily on mobile	**7%**	**-2**
% reading travel section of daily newspaper	**56%**	**+2**
% reading magazine	**62%**	**-3**
- Entertainment/music	**37%**	**+6**
- Food/cooking	**23%**	**-3**
- Home/garden	**22%**	**-3**
- Health/fitness/living	**19%**	**-3**
- Sports	**17%**	**+6**
Avg. # hrs. watch TV (reg)	**18.9**	**+4.8**
Avg. # hrs. watch PVR	**3.7**	**+0.3**
Ave. # hrs. watch TV online	**4.8**	**-0.4**
- Movies	**59%**	**+9**
- Crime dramas	**52%**	**+10**
- Sports	**47%**	**+13**
- Reality shows	**41%**	**+6**
Avg. # hrs. listen to radio	**8.4**	**+0.5**
- Oldies	**38%**	**+8**
- News/talk	**31%**	**-4**
- Sports	**19%**	**+6**

	Aces	Difference vs. Total Travellers
% using Internet	**86%**	**-3**
- Search engine	**75%**	**-2**
- Weather	**52%**	**-1**
- Shopping	**48%**	**-2**
- Games	**46%**	**+15**
- Sports	**35%**	**+7**
Avg. # hrs. spent browsing per week	**13.1**	**+0.4**
% using social networks	**73%**	**-5**
- Facebook	**64%**	**-4**
- Twitter	**9%**	**-5**
Avg. # hrs. spent on social networks	**4.1**	**-0.5**
% using smartphone/tablet when travelling	**34%**	**-12**
- Look up information	**72%**	**-5**
- Check review sites	**13%**	**-12**
- make reservations	**16%**	**-8**
- Use travel apps	**17%**	**-2**

How To Reach Outgoing Mature Couples

Detail Media Consumption

	Outgoing Mature Couples	Difference vs. Total Travellers
% reading newspaper	**82%**	**+16**
- Daily print	**73%**	**+15**
- Daily on computer	**16%**	**-17**
- Daily on mobile	**2%**	**-7**
% reading travel section of daily newspaper	**62%**	**+8**
% reading magazine	**78%**	**+13**
- Home/garden	**35%**	**+10**
- Food/cooking	**31%**	**+5**
- General interest	**31%**	**+11**
- Entertainment/music	**28%**	**-3**
- Crafts/antiques	**21%**	**+11**
Avg. # hrs. watch TV (reg)	**19.2**	**+5.1**
Avg. # hrs. watch PVR	**3.7**	**+0.3**
Ave. # hrs. watch TV online	**6.2**	**+1.0**
- News/current affairs	**67%**	**+22**
- Movies	**58%**	**+8**
- History	**46%**	**+11**
- Sports	**44%**	**+10**
Avg. # hrs. listen to radio	**11.3**	**+3.4**
- Oldies	**41%**	**+11**
- News/talk	**40%**	**+5**
- Country	**33%**	**+11**

	Outgoing Mature Couples	Difference vs. Total Travellers
% using Internet	**61%**	**-28**
- Search engine	**80%**	**+3**
- Weather	**51%**	**-2**
- Shopping	**38%**	**-12**
- Games	**36%**	**+5**
- Health	**33%**	**-3**
Avg. # hrs. spent browsing per week	**9.2**	**-3.5**
% using social networks	**67%**	**-11**
- Facebook	**50%**	**-18**
- Twitter	**4%**	**-10**
Avg. # hrs. spent on social networks	**9.2**	**-3.5**
% using smartphone/tablet when travelling	**16%**	**-30**
- Look up information	**58%**	**-19**
- Check review sites	**7%**	**-18**
- make reservations	**15%**	**-9**
- Use travel apps	**19%**	**±0**

How To Reach Family Memory Builders

Detail Media Consumption

	Family Memory Builders	Difference vs. Total Travellers
% reading newspaper	37%	-29
- Daily print	46%	-12
- Daily on computer	33%	±0
- Daily on mobile	8%	-1
% reading travel section of daily newspaper	38%	-16
% reading magazine	64%	-1
- Entertainment/music	35%	+4
- Home/garden	27%	+2
- Family/parenting	26%	+15
- Health/fitness/living	25%	±0
- Fashion/beauty	18%	+1
Avg. # hrs. watch TV (reg)	12.3	-1.8
Avg. # hrs. watch PVR	3.8	+0.4
Ave. # hrs. watch TV online	3.6	-1.6
- Dramas	53%	+4
- Reality shows	47%	+12
- Crime dramas	44%	+2
- Situation comedies	39%	+4
Avg. # hrs. listen to radio	7.7	-0.2
- Top 40	40%	+10
- News/talk	28%	-7
- Modern rock	33%	+6

	Family Memory Builders	Difference vs. Total Travellers
% using Internet	92%	+3
- Search engine	81%	+4
- Weather	56%	+3
- Shopping	54%	+4
- Entertainment	48%	+2
- Parenting	14%	+8
Avg. # hrs. spent browsing per week	11.1	-1.0
% using social networks	81%	+3
- Facebook	75%	+7
- Twitter	9%	-5
Avg. # hrs. spent on social networks	4.9	+0.3
% using smartphone/tablet when travelling	51%	+5
- Look up information	81%	+4
- Check review sites	19%	-+6
- make reservations	14%	-10
- Use travel apps	13%	-6

How To Reach Mellow Vacationers

Detail Media Consumption

	Mellow Vacationers	Difference vs. Total Travellers
% reading newspaper	**65%**	**-1**
- Daily print	**59%**	**+1**
- Daily on computer	**29%**	**-4**
- Daily on mobile	**5%**	**-4**
% reading travel section of daily newspaper	**42%**	**-12**
% reading magazine	**64%**	**-1**
- Home/garden	**26%**	**+1**
- Food/cooking	**22%**	**-4**
- General interest	**21%**	**+1**
- Entertainment/music	**20%**	**-11**
- Health/fitness/living	**18%**	**-4**
Avg. # hrs. watch TV (reg)	**14.8**	**+0.7**
Avg. # hrs. watch PVR	**2.6**	**-0.8**
Ave. # hrs. watch TV online	**4.0**	**-1.2**
- Dramas	**47%**	**-2**
- Movies	**45%**	**-5**
- News/current affairs	**44%**	**-1**
- History	**37%**	**+2**
Avg. # hrs. listen to radio	**7.8**	**-0.1**
- News/talk	**37%**	**+2**
- Oldies	**34%**	**+4**
- Top 40	**18%**	**-12**

	Mellow Vacationers	Difference vs. Total Travellers
% using Internet	**89%**	**±0**
- Search engine	**77%**	**±0**
- Weather	**50%**	**-3**
- Shopping	**44%**	**-6**
- Entertainment	**31%**	**-15**
- Travel	**16%**	**-17**
Avg. # hrs. spent browsing per week	**11.0**	**-1.7**
% using social networks	**66%**	**-12**
- Facebook	**56%**	**-12**
- Twitter	**6%**	**-8**
Avg. # hrs. spent on social networks	**3.1**	**-1.5**
% using smartphone/tablet when travelling	**29%**	**-17**
- Look up information	**68%**	**-9**
- Check review sites	**12%**	**-13**
- make reservations	**10%**	**-14**
- Use travel apps	**10%**	**-9**

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**

How To Reach Solitaires

Detail Media Consumption

	Solitaries	Difference vs. Total Travellers
% reading newspaper	**68%**	**+2**
- Daily print	**56%**	**-2**
- Daily on computer	**36%**	**+3**
- Daily on mobile	**6%**	**-3**
% reading travel section of daily newspaper	**48%**	**-6**
% reading magazine	**65%**	**±0**
- Entertainment/music	**30%**	**-1**
- News	**25%**	**+7**
- Food/cooking	**23%**	**-3**
- Health/fitness/living	**21%**	**-1**
- Science/geography	**16%**	**+2**
Avg. # hrs. watch TV (reg)	**15.7**	**+1.6**
Avg. # hrs. watch PVR	**3.0**	**-0.4**
Ave. # hrs. watch TV online	**5.3**	**+0.1**
- Dramas	**50%**	**+1**
- News/current affairs	**49%**	**+4**
- History	**38%**	**+4**
- Science fiction/fantasy	**23%**	**+5**
Avg. # hrs. listen to radio	**8.9**	**+1.0**
- News/talk	**42%**	**+7**
- Oldies	**32%**	**+2**
- Classical	**18%**	**+6**

	Solitaires	Difference vs. Total Travellers
% using Internet	**86%**	**-3**
- Search engine	**80%**	**+3**
- Weather	**53%**	**±0**
- Shopping	**52%**	**+2**
- Network news sites	**36%**	**+5**
- Newspaper sites	**33%**	**+4**
Avg. # hrs. spent browsing per week	**15.5**	**+2.8**
% using social networks	**68%**	**-10**
- Facebook	**56%**	**-12**
- Twitter	**11%**	**-3**
Avg. # hrs. spent on social networks	**4.5**	**-0.1**
% using smartphone/tablet when travelling	**30%**	**-16**
- Look up information	**70%**	**-7**
- Check review sites	**18%**	**-7**
- make reservations	**19%**	**-5**
- Use travel apps	**16%**	**-3**

How To Reach Youthful Socializers

Detail Media Consumption

	Youthful Socializers	Difference vs. Total Travellers
% reading newspaper	50%	-16
- Daily print	45%	-13
- Daily on computer	42%	+9
- Daily on mobile	11%	+2
% reading travel section of daily newspaper	41%	-13
% reading magazine	57%	-8
- Entertainment/music	44%	+13
- Fashion/beauty	30%	+13
- Food/cooking	23%	-3
- Health/fitness/living	20%	-2
- General interest	17%	-3
Avg. # hrs. watch TV (reg)	12.9	-1.2
Avg. # hrs. watch PVR	3.2	-0.2
Ave. # hrs. watch TV online	6.5	1.3
- Dramas	54%	+5
- Movies	52%	+2
- Situation comedies	42%	+7
- Reality shows	39%	+4
Avg. # hrs. listen to radio	7.1	-0.8
- Top 40	47%	+17
- Modern rock	34%	+7
- News/talk	24%	-11

	Youthful Socializers	Difference vs. Total Travellers
% using Internet	95%	+6
- Search engine	81%	+4
- Shopping	59%	+9
- Entertainment	58%	+12
- Weather	50%	-3
- Video download/upload sites	46%	+18
Avg. # hrs. spent browsing per week	15.8	+3.1
% using social networks	90%	+12
- Facebook	86%	+18
- Twitter	22%	+8
Avg. # hrs. spent on social networks	6.9	+2.3
% using smartphone/tablet when travelling	65%	+19
- Look up information	85%	+8
- Check review sites	20%	-5
- make reservations	13%	-11
- Use travel apps	18%	-1

Pampered Relaxers Population Projections

Geographic Markets

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total Canada	**1,407,113**	**10.5%**
Ontario	844,268	9.4%
GTA	406,053	10.3%
Other Ontario	450,276	8.9%
Quebec	514,601	13.5%
Montreal	389,971	13.6%
Other Quebec	124,630	13.1%
Manitoba	40,203	7.4%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Major US Markets		
Philadelphia	144,732	3.5%
Boston	221,118	4.5%
Chicago	140,711	2.2%
New York City	317,605	4.3%
Washington DC	112,569	2.6%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total US	**2,613,210**	**2.6%**
States:		
Connecticut	52,264	1.9%
Delaware	48,244	7.0%
Illinois	196,996	2.0%
Indiana	64,325	1.3%
Maryland	84,427	3.2%
Massachusetts	217,097	3.8%
Michigan	124,630	1.7%
Minnesota	88,447	2.2%
New Jersey	233,179	4.1%
New York	534,703	3.9%
Ohio	144,732	1.6%
Pennsylvania	257,301	2.3%
Virginia	116,589	2.8%
Wisconsin	152,772	3.6%
Kentucky	100,508	3.3%
New Hampshire	40,203	2.5%
North Carolina	104,528	1.4%
Rhode Island	16,081	1.9%
Vermont	8,041	1.6%
West Virginia	16,081	1.2%

Sports 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	**1,487,058**	**11.1%**
Ontario	995,185	11.1%
GTA	377,484	9.5%
Other Ontario	617,701	12.2%
Quebec	394,642	10.3%
Montreal	268,814	9.4%
Other Quebec	125,828	13.3%
Manitoba	97,231	17.9%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Major US Markets		
Philadelphia	177,303	4.3%
Boston	200,181	4.1%
Chicago	183,023	2.8%
New York City	148,706	2.0%
Washington DC	217,339	5.0%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total US	**4,232,397**	**4.2%**
States:		
Connecticut	68,633	2.5%
Delaware	22,878	3.3%
Illinois	383,203	3.9%
Indiana	188,742	3.9%
Maryland	240,217	9.0%
Massachusetts	240,217	4.2%
Michigan	285,973	3.8%
Minnesota	217,339	5.3%
New Jersey	326,009	5.7%
New York	491,873	3.6%
Ohio	434,679	4.7%
Pennsylvania	503,312	4.5%
Virginia	200,181	4.8%
Wisconsin	142,986	3.4%
Kentucky	68,633	2.3%
New Hampshire	11,439	0.7%
North Carolina	308,851	4.3%
Rhode Island	28,597	3.5%
Vermont	22,878	4.6%
West Virginia	57,195	4.2%

TNS

Knowledge Seekers Population Projections

Geographic Markets

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**902,005**	**6.7%**
Ontario	578,209	6.4%
GTA	312,233	7.9%
Other Ontario	260,194	5.2%
Quebec	300,668	7.9%
Montreal	225,501	7.8%
Other Quebec	75,167	7.9%
Manitoba	23,128	4.3%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	185,027	4.5%
Boston	277,540	5.6%
Chicago	364,271	5.7%
New York City	387,400	5.2%
Washington DC	323,797	7.4%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**4,880,080**	**4.8%**
States:		
Connecticut	190,809	6.9%
Delaware	23,128	3.3%
Illinois	462,567	4.8%
Indiana	144,552	3.0%
Maryland	289,104	10.8%
Massachusetts	277,540	4.8%
Michigan	231,283	3.1%
Minnesota	213,937	5.2%
New Jersey	491,477	8.6%
New York	751,671	5.5%
Ohio	312,233	3.4%
Pennsylvania	387,400	3.5%
Virginia	393,182	9.5%
Wisconsin	225,501	5.3%
Kentucky	86,731	2.9%
New Hampshire	63,603	4.0%
North Carolina	237,065	3.3%
Rhode Island	28,910	3.5%
Vermont	11,564	2.3%
West Virginia	28,910	2.1%

Up and Coming Explorers Population Projections

Geographic Markets

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**606,106**	**4.5%**
Ontario	501,347	5.6%
GTA	404,071	10.2%
Other Ontario	97,276	1.9%
Quebec	97,276	2.5%
Montreal	82,311	2.9%
Other Quebec	14,966	1.6%
Manitoba	7,483	1.4%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	329,243	8.1%
Boston	306,794	6.2%
Chicago	486,381	7.6%
New York City	1,010,177	13.6%
Washington DC	434,002	9.9%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**6,876,684**	**6.8%**
States:		
Connecticut	359,174	13.0%
Delaware	44,897	6.5%
Illinois	583,658	6.0%
Indiana	82,311	1.7%
Maryland	366,657	13.7%
Massachusetts	314,277	5.5%
Michigan	351,691	4.7%
Minnesota	119,725	2.9%
New Jersey	568,692	9.9%
New York	1,631,248	12.0%
Ohio	493,864	5.4%
Pennsylvania	501,347	4.5%
Virginia	471,416	11.4%
Wisconsin	231,966	5.5%
Kentucky	157,139	5.2%
New Hampshire	52,380	3.3%
North Carolina	434,002	6.0%
Rhode Island	22,448	2.7%
Vermont	14,966	3.0%
West Virginia	29,931	2.2%

Connected Explorers Population Projections

Geographic Markets

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total Canada	**738,329**	**5.5%**
Ontario	560,339	6.2%
GTA	290,058	7.3%
Other Ontario	270,281	5.4%
Quebec	138,437	3.6%
Montreal	112,068	3.9%
Other Quebec	26,369	2.8%
Manitoba	32,961	6.1%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Major US Markets		
Philadelphia	270,281	6.6%
Boston	323,019	6.6%
Chicago	573,523	8.9%
New York City	421,902	5.7%
Washington DC	402,125	9.2%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total US	**5,853,891**	**5.8%**
States:		
Connecticut	171,398	6.2%
Delaware	19,777	2.9%
Illinois	764,698	7.9%
Indiana	276,873	5.7%
Maryland	309,834	11.6%
Massachusetts	296,650	5.1%
Michigan	395,533	5.2%
Minnesota	204,359	5.0%
New Jersey	395,533	6.9%
New York	711,960	5.2%
Ohio	329,611	3.6%
Pennsylvania	468,048	4.2%
Virginia	342,795	8.3%
Wisconsin	250,504	5.9%
Kentucky	250,504	8.3%
New Hampshire	72,514	4.5%
North Carolina	448,271	6.2%
Rhode Island	26,369	3.2%
Vermont	13,184	2.7%
West Virginia	52,738	3.9%

Aces Population Projections

Geographic Markets

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**821,422**	**6.1%**
Ontario	659,048	7.3%
GTA	286,543	7.2%
Other Ontario	382,057	7.6%
Quebec	105,066	2.7%
Montreal	76,411	2.7%
Other Quebec	28,654	3.0%
Manitoba	57,309	10.6%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	391,608	9.6%
Boston	439,365	8.9%
Chicago	506,225	7.9%
New York City	678,151	9.1%
Washington DC	229,234	5.2%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**8,729,999**	**8.7%**
States:		
Connecticut	171,926	6.2%
Delaware	38,206	5.5%
Illinois	811,871	8.4%
Indiana	276,991	5.7%
Maryland	315,197	11.8%
Massachusetts	468,020	8.1%
Michigan	735,459	9.8%
Minnesota	372,505	9.1%
New Jersey	582,637	10.2%
New York	1,442,265	10.6%
Ohio	926,488	10.1%
Pennsylvania	1,012,451	9.1%
Virginia	401,160	9.7%
Wisconsin	439,365	10.3%
Kentucky	248,337	8.3%
New Hampshire	66,860	4.2%
North Carolina	257,888	3.6%
Rhode Island	57,309	6.9%
Vermont	47,757	9.6%
West Virginia	38,206	2.8%

Outgoing Mature Couples Population Projections

Geographic Markets

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total Canada	**1,649,502**	**12.3%**
Ontario	996,045	11.1%
GTA	285,491	7.2%
Other Ontario	710,555	14.1%
Quebec	602,703	15.8%
Montreal	425,064	14.8%
Other Quebec	177,639	18.7%
Manitoba	50,754	9.4%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Major US Markets		
Philadelphia	158,606	3.9%
Boston	183,983	3.7%
Chicago	342,589	5.3%
New York City	133,229	1.8%
Washington DC	145,917	3.3%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total US	**4,694,736**	**4.7%**
States:		
Connecticut	95,164	3.5%
Delaware	31,721	4.6%
Illinois	526,572	5.4%
Indiana	228,393	4.7%
Maryland	164,950	6.2%
Massachusetts	177,639	3.1%
Michigan	418,720	5.6%
Minnesota	253,770	6.2%
New Jersey	253,770	4.4%
New York	406,031	3.0%
Ohio	444,097	4.8%
Pennsylvania	412,375	3.7%
Virginia	336,245	8.1%
Wisconsin	253,770	6.0%
Kentucky	139,573	4.6%
New Hampshire	76,131	4.8%
North Carolina	336,245	4.6%
Rhode Island	31,721	3.8%
Vermont	12,688	2.6%
West Virginia	101,508	7.5%

Family Memory Builders Population Projections

Geographic Markets

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**911,476**	**6.8%**
Ontario	658,898	7.3%
GTA	252,578	6.4%
Other Ontario	406,321	8.1%
Quebec	197,669	5.2%
Montreal	164,725	5.7%
Other Quebec	32,945	3.5%
Manitoba	43,927	8.1%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	384,357	9.4%
Boston	483,192	9.8%
Chicago	582,027	9.1%
New York City	318,468	4.3%
Washington DC	362,394	8.3%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**10,070,162**	**10.0%**
States:		
Connecticut	263,559	9.6%
Delaware	54,908	7.9%
Illinois	955,403	9.8%
Indiana	669,880	13.9%
Maryland	373,376	13.9%
Massachusetts	439,266	7.6%
Michigan	647,917	8.6%
Minnesota	395,339	9.6%
New Jersey	549,082	9.6%
New York	955,403	7.0%
Ohio	834,604	9.1%
Pennsylvania	977,366	8.7%
Virginia	724,788	17.5%
Wisconsin	373,376	8.8%
Kentucky	417,302	13.9%
New Hampshire	120,798	7.6%
North Carolina	977,366	13.5%
Rhode Island	87,853	10.6%
Vermont	98,835	19.9%
West Virginia	120,798	9.0%

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Mellow Vacationers Population Projections

Geographic Markets

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**1,211,108**	**9.1%**
Ontario	842,510	9.4%
GTA	315,941	8.0%
Other Ontario	526,569	10.4%
Quebec	298,389	7.8%
Montreal	228,180	7.9%
Other Quebec	70,209	7.4%
Manitoba	70,209	13.0%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	526,569	12.9%
Boston	807,405	16.4%
Chicago	965,376	15.0%
New York City	842,510	11.3%
Washington DC	702,092	16.0%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**16,341,181**	**16.2%**
States:		
Connecticut	456,360	16.6%
Delaware	87,761	12.7%
Illinois	1,404,183	14.5%
Indiana	631,882	13.1%
Maryland	649,435	24.3%
Massachusetts	824,958	14.3%
Michigan	1,316,422	17.5%
Minnesota	614,330	14.9%
New Jersey	982,928	17.2%
New York	2,018,513	14.9%
Ohio	1,386,631	15.1%
Pennsylvania	1,527,049	13.7%
Virginia	947,824	22.9%
Wisconsin	842,510	19.8%
Kentucky	596,778	19.9%
New Hampshire	210,627	13.2%
North Carolina	1,211,108	16.7%
Rhode Island	122,866	14.8%
Vermont	193,075	38.9%
West Virginia	298,389	22.2%

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%

Solitaries Population Projections

Geographic Markets

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total Canada	**846,885**	**6.3%**
Ontario	573,696	6.4%
GTA	307,337	7.8%
Other Ontario	266,359	5.3%
Quebec	239,040	6.3%
Montreal	198,062	6.9%
Other Quebec	40,978	4.3%
Manitoba	34,149	6.3%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Major US Markets		
Philadelphia	218,551	5.3%
Boston	341,486	7.0%
Chicago	389,294	6.1%
New York City	505,399	6.8%
Washington DC	396,124	9.0%

Place of Residence:	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Total US	**5,982,832**	**5.9%**
States:		
Connecticut	116,105	4.2%
Delaware	61,467	8.9%
Illinois	662,482	6.8%
Indiana	218,551	4.5%
Maryland	341,486	12.8%
Massachusetts	361,975	6.3%
Michigan	389,294	5.2%
Minnesota	218,551	5.3%
New Jersey	368,805	6.4%
New York	887,863	6.5%
Ohio	314,167	3.4%
Pennsylvania	375,634	3.4%
Virginia	635,164	15.4%
Wisconsin	184,402	4.3%
Kentucky	102,446	3.4%
New Hampshire	27,319	1.7%
North Carolina	457,591	6.3%
Rhode Island	75,127	9.1%
Vermont	47,808	9.6%
West Virginia	68,297	5.1%

Youthful Socializers Population Projections
Geographic Markets

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total Canada	**1,363,706**	**10.2%**
Ontario	1,014,327	11.3%
GTA	518,434	13.1%
Other Ontario	495,893	9.8%
Quebec	281,757	7.4%
Montreal	214,136	7.4%
Other Quebec	56,351	5.9%
Manitoba	67,622	12.5%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Major US Markets		
Philadelphia	450,812	11.0%
Boston	417,001	8.5%
Chicago	608,596	9.5%
New York City	845,272	11.4%
Washington DC	529,704	12.1%

	Projected number of adults 18+ in segment	Segment incidence among total adults in each market
Place of Residence:		
Total US	**9,906,593**	**9.8%**
States:		
Connecticut	326,839	11.9%
Delaware	56,351	8.1%
Illinois	957,975	9.9%
Indiana	349,379	7.2%
Maryland	405,731	15.2%
Massachusetts	507,163	8.8%
Michigan	777,651	10.3%
Minnesota	383,190	9.3%
New Jersey	698,759	12.2%
New York	1,420,058	10.5%
Ohio	788,921	8.6%
Pennsylvania	800,191	7.2%
Virginia	631,137	15.3%
Wisconsin	462,082	10.9%
Kentucky	236,676	7.9%
New Hampshire	78,892	4.9%
North Carolina	777,651	10.7%
Rhode Island	56,351	6.8%
Vermont	56,351	11.3%
West Virginia	67,622	5.0%